2022 Japan Major Activities

HTA Branding Standing Committee
4.27.2022

Eric Takahata
Managing Director
MARKET SITUATION
Current Japan economic conditions

- **Vaccination**: 49.2% have completed booster shots and 79.9% are fully vaccinated as of April 20 in Japan.

- **Economic trend** continued positive movement in goods consumption. GDP growth for 2022 is projected at 2.1%. Go-To-Travel will resume for domestic travel post Golden Week holiday in May.

- **April Consumer Confidence index** has been the highest in the past 5 years. Especially, in 16 categories, “travel” and “car & motorcycles” have increased compared to previous months. This indicates consumers are consciously planning for long haul travel.

- **Exchange rate**: Yen rate = 129.43 yen/USD
Current travel industry conditions

- **Easing of border restrictions**: On April 1, the Ministry of Foreign Affairs of Japan (MOFA) eased travel advisory from Level 3 to Level 2. This is a major step for Japanese travel agencies to start selling package tours.

- **Increased daily entry**: From April 10, Japan has increased its daily new entry capacity to **10,000**.

- **Oil Surcharge**: Increase from **25,400 yen/RT (=$210)** to **47,200 yen/RT (=$390)** for June & July travel.

- **Four major airlines’ (ANA, Hawaiian, JAL, and ZIPAIR) operations**

<table>
<thead>
<tr>
<th></th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flights</td>
<td>81</td>
<td>79</td>
<td>91</td>
<td>137</td>
</tr>
<tr>
<td>Seats</td>
<td>19,099</td>
<td>18,814</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>
Roadmap for Overseas Travel Resumption

April | May | June | July | August | September | October | November | December

- **Booster Vaccine Rate**
  - April: ~67%
  - June: ~79%
  - July: ~84%
  (Source: Ministry of Health, Labor & Welfare)

- **Domestic Situation**
  - Diffusion of Oral Medicine
  - Ease of restriction with VTP (Vaccination Testing Package)

- **Japanese Domestic & Inbound Travel**
  - Go To Travel Campaign (Fostering demand of Japanese Domestic Travel)
  - Inbound Travel Monitor Test (Assuming reopening)

- **Ease of Border Control**
  - Reduction of Infectious Disease Risk Level
  - Further ease or elimination of restrictions on entry into Japan
  - Resumption of Overseas Travel (From calm area of the infection gradually)

- **JATA Activities**
  - Dispatching Delegations to Reopening Areas
  - B2B Webinar
  - B2B Webinar
  - B2B Promotion
  - Cultivating Travel Demand
  - B2C Promotion
  - Fostering Travel Demand
  - Tourism Expo Japan Tokyo
  - B2B Webinar

**Note:** The various schedules shown in this roadmap are based on JATA's own projections and are not officially announced plans.

**Completely Back to Normal**
Living with COVID-19.

- **Two Remaining Obstacles**
  1. Daily arrivals is restricted to max 10,000.
  2. Infectious Disease Risk Level is still 3. → from 4/1, lowered to Level 2

※Japanese government is considering 4th vaccination.
HTJ MAJOR INITIATIVES
MAY TO DECEMBER 2022
4 Pillars of Hawaiʻi Tourism Management

- **Natural Resources**
  - Advertising Campaigns
  - Gakken (Scholastic) manga for young generations

- **Hawaiian Culture**
  - Advertising Campaigns
  - Mālama Hawaiʻi SNS campaign
  - Gakken (Scholastic) manga for young generations
  - Continuous ‘Ōlelo Hawaiʻi education

- **Community**
  - Product development
  - Webinars

- **Brand Marketing**
  - Advertising Campaigns/Digital Marketing
  - Mālama Hawaiʻi SNS campaign
CONSUMER & PR INITIATIVES
MĂLAMA HAWAI‘I ADVERTISING CAMPAIGNS

- Newspaper panorama ad
- Newspaper partner alliance ad
- Airline Inflight

- OOH
MĀLAMA HAWAI‘I DIGITAL MARKETING

Promote Mālama Hawai‘i and Pono Traveler initiatives through advertising campaigns and ambassador projects to share the Mālama Hawai‘i message.
MĀLAMA HAWAI‘I MARKETING INITIATIVES

Through various angles, promote the concept and value of Mālama Hawai‘i to increase awareness of a Mālama mindset to the Japan Market

Mālama Hawai‘i SNS campaign

Gakken (Scholastic) manga for younger generations

Continuous ‘Ōlelo Hawai‘i education
HAWAIʻI COMMUNITY EVENT SUPPORT

- PR & Promotion
- Travel Industry Collaboration
  - Tour packages
  - PR & Promotion
- Collaborate on sales/promotion of Hawaiʻi made products/services
- Drive positive interaction with local community and Japanese visitors
Golf Promotion

With Japanese golf players like Matsuyama winning major tournaments in the U.S., interest in golf and watching tournaments have increased. Stories of golf in Hawai‘i will be featured more and promoted in golf magazines and digital media.
MEDIA RELATIONS

• Focus on target media that features Mālama Hawai‘i
• Conduct online webinars to target editors and freelancers
• Conduct individual press tours according to media characteristics
• Periodic news releases, mail magazine distribution
**PR INITIATIVES**

“Mālama Hawai‘i Media 100” Project
Reaching out to 100 selected writers and editors to cultivate a deeper understanding of the Mālama Hawai‘i’s concept, Hawai‘i’s initiatives, etc.

- **“Doubling Media Sites Access” Project:** Enhancing the content on HTJ’s media site where media can always find information and stories related to Mālama Hawai‘i.

- **Conduct Media Workshops in Autumn:** Conduct media workshops to promote communications between Hawai‘i’s partners and the media.

- **Local Media Coordinator Relations:** Communicate with local media coordinators who provide information to the Japanese media on the concept of Mālama Hawai‘i.
EVENT MARKETING
MADE IN HAWAI‘I PROMOTION

HTJ collaborates with major Hawai‘i consumer events to promote and increase awareness of Made in Hawai‘i products in the Japanese market by working with DBEDT.

- Sapporo (OCT)
- Nagoya (MAY)
- Hiroshima (SEP)
- Osaka (JUL)
- Tokyo (SEP)
- Yokohama (JUN)
- Okinawa (NOV)
EVENT MARKETING
HŌKULE‘A PROJECT – MOVIE BLITZ

Support Polynesian Voyaging Society’s initiative through the screening of the documentary film, “Moananuiākea” in 3 sister cities and collaborative Hawai‘i events from July to Dec.

- “Moananuiākea” film screening
- Crew Talk show
- Donation booth setup
- Educational Seminar
- Sister City Relations

Sapporo (OCT)
Nagoya (MAY)
Hiroshima (SEP)
Osaka (JUL)
Tokyo (SEP)
Yokohama (JUN)
Okinawa (NOV)
TRAVEL TRADE INITIATIVES
TRAVEL TRADE MEDIA TIE-UPS

To educate on the concepts of Mālama Hawai‘i and Hawai‘i regenerative tourism throughout the travel industry in Japan, HTJ to collaborate with four major travel trade medias.

<table>
<thead>
<tr>
<th>Total</th>
<th>Travel Journal</th>
<th>Travel Voice</th>
<th>Travel Watch</th>
<th>Wing Travel</th>
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<tbody>
<tr>
<td>Reach</td>
<td>10,860,000</td>
<td>270,000</td>
<td>1,500,000</td>
<td>9,000,000</td>
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</table>
JATA TOURISM EXPO

• Date: September 22 – 25
  • Travel Trade B2B: 9/22 & 23
  • Consumer Event: 9/24 & 25
• Location: Tokyo Big Site
• Number of attendees: 150,000
PARTNER COLLABORATION

- Promotions & campaigns
- Staff training
- Product development
- Webinars

<table>
<thead>
<tr>
<th>Major Airlines</th>
<th>Wholesalers</th>
<th>OTAs</th>
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<tr>
<td>Hawaiian Airlines</td>
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<td><a href="#">Logos</a></td>
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<tr>
<td>ZIPAIR</td>
<td><a href="#">Logos</a></td>
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[Logos](#)
B2B WORKSHOP / MAHALO RECEPTION

- Date: End of November (TBD)
- Location: Tokyo and Osaka
- Purpose:
  - To share 4 pillars and educate about the Mālama Hawai‘i mindset throughout the travel industry
  - To give an opportunity for Hawai‘i marketing partners to strengthen relationships with travel trade representatives
  - To show appreciation to key representatives for their continued support

OSAKA
150 agents
40 partners

TOKYO
350 agents
40 partners
GOVERNMENT RELATIONS

HTJ facilitates governmental relations and will be coordinating a Governor lead delegation to Japan in May covering Japan governmental meetings, tourism stakeholder meetings, and economic development meetings.

- Japan Association of Travel Agents (JATA) visit in April
- The Japan-Hawai‘i Legislator’s Friendship Association visit in April
- Governor Delegation visit in May
BUDGET

HTJ Annual Budget: $9,000,000
January – April Actual: $1,364,518

May – December Remaining: $7,635,482

<table>
<thead>
<tr>
<th>May – December Budget Allocation</th>
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<tr>
<td>Admin</td>
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<tr>
<td>Consumer Direct</td>
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<td>Travel Trade</td>
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MAHALO NUI LOA