



Marianas Visitors Authority General Membership Meeting

July 3, 2014

Key Market Update





Korea
China
Taiwan
Japan
Russia



Korea Market Update



- **2014 ECONOMIC GROWTH:** 3.8% growth in 2014 compared to last year's 2.7%.

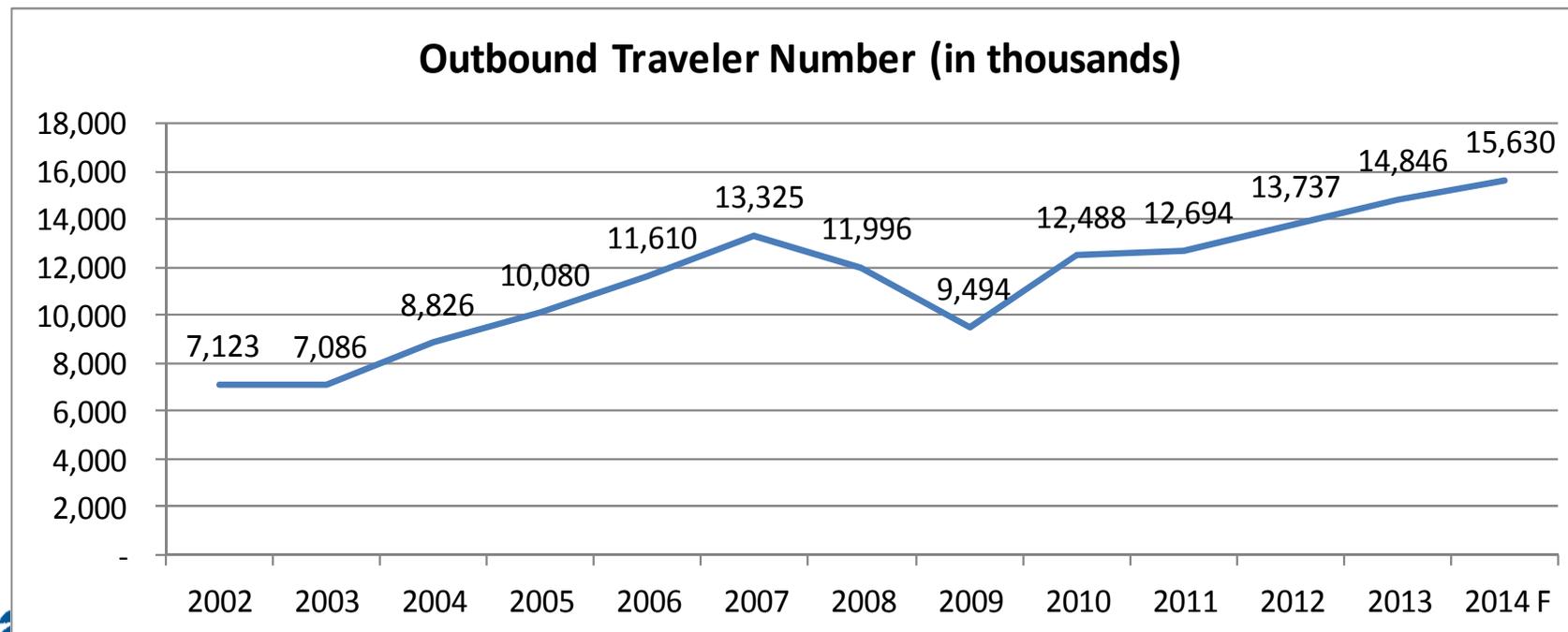
- **FERRY ACCIDENT:**
 - The ferry Sewol sinking on April 16 killed over 300 Korean
 - The tragedy has cast a pall of deep gloom over the entire nation and citizens lost trust in the government and cancelled overseas holidays during this time of national mourning
 - Short haul and cruise travel were heavily impacted
 - The market is just now returning to normal

- **2014 TRAVEL FORECAST:** all economic indicators indicate strong continued growth in outbound travel from Korea to the CNMI in the remainder of 2014

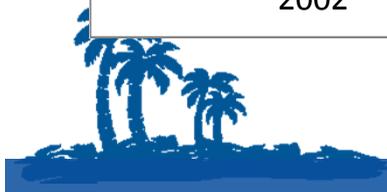


Korean Outbound Travel Overview

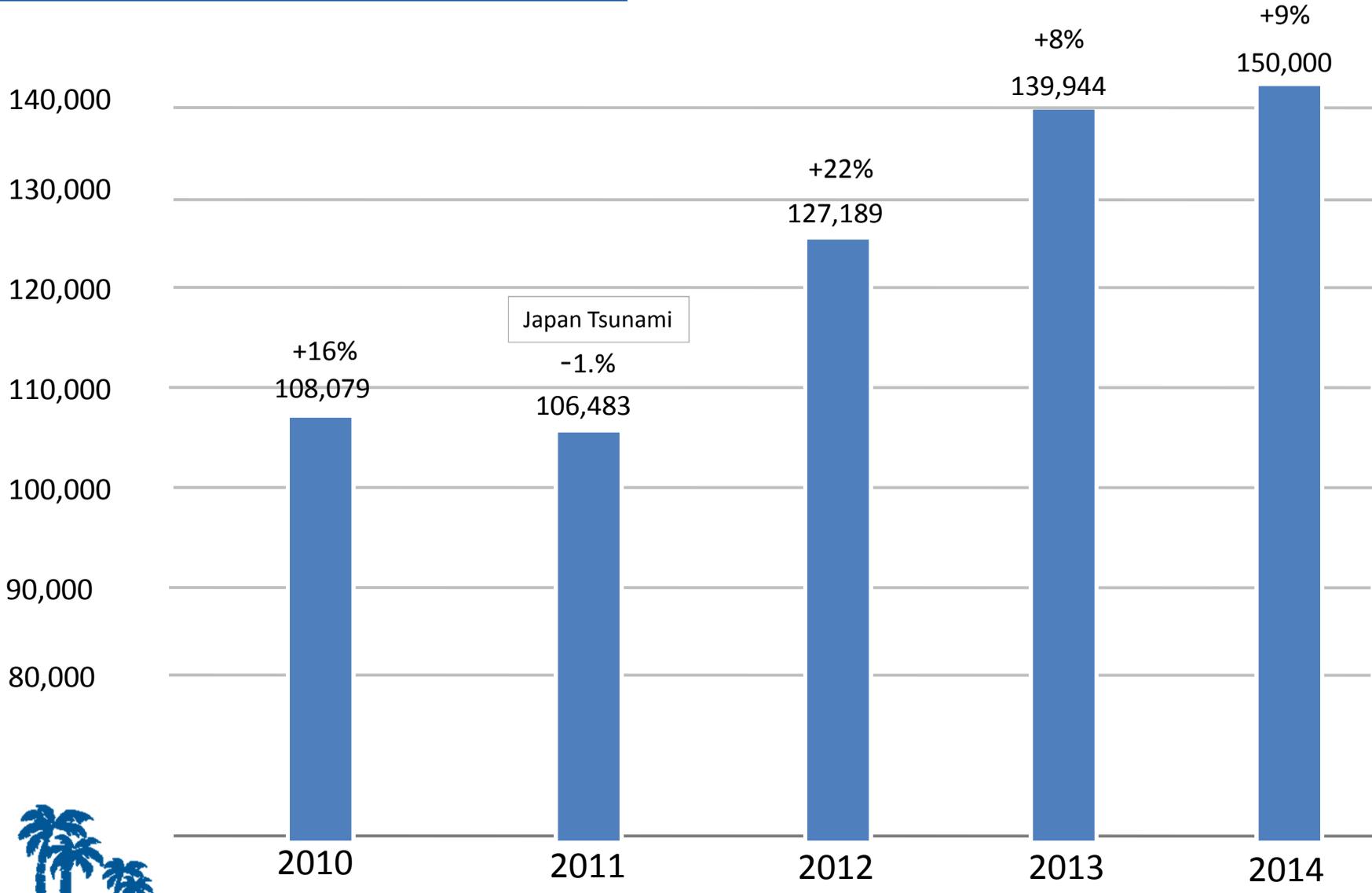
- 2013 OUTBOUND TRAVEL:** the total number of Korean outbound travelers in 2013 was 14.8 million up 8.1% year-on-year.
- 2014 FORECAST:** the number of Koreans travelling overseas in 2014 is expected to exceed 15.6 million growing 5%.



Source: Korea Tourism Organization(KTO)



Korean Arrivals to the CNMI



New Flights to the CNMI



- DYNAMIC AIRWAYS:** Dynamic Airways had launched Incheon/Saipan service with B767-200s from October 30, 2013. However, Dynamic Airways temporarily suspended its operation due to internal issues. The airline is now planning to launch two flights a week from Busan to Saipan from December 17th.



- JEJU AIR:** Korea's LCC, Jeju Air is planning to commence daily service to the CNMI from October 1 generating 69,000 seats, potentially 55,000 incremental Korean visitors and over \$120 million in incremental spending from the Korea market.

Dates	Day	Fight No.	Sector	Schedule	Aircraft
Oct 1, 2014 – Sep 30, 2015	Daily	7C3402	ICN/SPN	09:30/14:55	BOEING 737-800 189 seats
		7C3401	SPN/ICN	16:00/19:45	





2014 Korea Marketing Programs



Travel Trade Marketing



- **TOP AGENT MARKET SHARE:** the top 10 Korean outbound travel agents represent over 85% of all outbound travel from Korea, and the Top 2 Korean travel agents, Hana Tour and Mode Tour represent a 50% market share.
- KRT, Yellow Balloon, Bomul Tour, Very Good Tour & Interpark have been showing increase of sales volume to the CNMI compared with last year.



Road shows & Trade Shows

Trade FAM Tours with Asiana





Launched 13 TV Home-Shopping Campaigns – generating 8,000 Visitors to the CNMI

LOTTE HomeShopping
6월 1일 02시 00분 이븐시백

숨겨진 환상의 섬 사이판
티니안
깨끗한 바다 속과 마음지 않은 자연환경
티니안 다이내스티 호텔&카지노

노랑풍선
티니안 특전

- 01 *아시아 항공 특별의 특별 비행(약 100마일리지 적립)
- 02 티니안 다이내스티 호텔 2박3일 2인1실
- 03 호텔 특별식 (한미/동식갈/일식갈)
- 04 호텔 특식회 포함(내빈에게 or BBQ 선택)
- 05 정바람기 티니안 아일랜드 관광표 2인1실 문화체험
- 06 해럴드로브 포함(메이크업/헤어/네일/스킨케어/화장품)
- 07 스킨케어 특별식 무제한 (수업, 궁정호박 포함)
- 08 남제왕의 라벨과 소일링 받을 수 있는 "풍동 날리기 체험"
- 09 공항 <-> 호텔부 공항 픽업 서비스 제공
- 10 항공TAX 포함(연료보충세 포함)
- 11 LIG 1박1일 여행사 부원
- 12 *전시여행에 보 수출여행사 제공 (연료보충세)

오전 출발 4일 ₩849,000~

오후 출발 5일 ₩799,000~

타니안 4박5일 ₩799,000~

Worldresort 돌아왔다!

아동 동반 고객!!
디럭스룸 무료 업그레이드

GS홈쇼핑 4월 13일 새벽 1시 방영

아동반환가 ₩100,000

3천495일 또는 14만5천 원 선제

GOLD 3백5십만
899,000원(부가세 포함)
아동 449,000원(부가세 포함)

10만원 추가시
GOLD 4백5십만

아동반환! (연간 최대 50%)

080-000-8080 080-000-8000

아시아항공 799,000원(부가세 포함)부터

LOTTE HomeShopping & 모두투어

아시아항공 799,000원(부가세 포함)부터

아동반환 399,500원(부가세 포함)부터

080-810-0000 080-000-0000



Joint Campaigns with Major Travel Agents – Tagaman, Taste of the Marianas, SIT

The 25th Annual Tagaman Triathlon
April 12, 2014

2014 타가맨 (Tagaman) 사이판 철인3종 경기
2014. 4.12

2014 타가맨 사이판 철인 3종 경기

타가맨 (Tagaman)은 사이판의 유일한 타가스톤에서 유래한 단거리 사이판에서 매년 개최되는 철인 3종 스포츠 경기로서 오는 2014년에는 4월 11일 그 화려한 막이 오른다. 약 120여 명의 참가자와 100여 명의 자원봉사자가 참가할 예정이다. 참가비는 1인당 100달러이며, 참가비는 1인당 100달러이며, 참가비는 1인당 100달러이다.

경기일정	4월 11일 (금요일)	4월 12일 (토요일)	4월 13일 (일요일)
2:00 pm - 5:00 pm	철인 삼종경기 참가 등록 (사이판 PIC 리조트)	4:00 am - 5:30 am	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)
6:00 pm -	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)	6:00 am	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)
		1:00 pm	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)
		6:00 pm	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)
		1:00 pm	타가맨 철인 삼종 경기 참가 등록 (사이판 PIC 리조트)

대회규정

본 경기는 미국 철인 3종 경기법에서 규약 준용하는 대회로서 미국 철인 3종 경기법 규정이 모든 참가자는 미국 철인 3종 경기법에서 인정되고 유효한 면허를 소지하고 있어야 하는 일정 연령을 18세 이상이어야 한다.

2014 타가맨 사이판 철인 3종 경기 PIC 골드 4일

상품 자세히 보기

상품 예약 및 문의 02-2124-5533

Saipan Tinian Rota ASIANA AIRLINES

Taste of Marianas

사이판 마리아나 맛축제

사이판에서 즐기는 색다른 맛의 세계! 다채로운 공연도 즐길 수 있는 사이판으로 GO! GO!!

5월 1일 열린 사이판에서는 특별한 맛 축제가 열렸다. 5월 1일 열린 사이판에서는 특별한 맛 축제가 열렸다. 5월 1일 열린 사이판에서는 특별한 맛 축제가 열렸다.

사이판 오션뷰빌 4일 ₩499,000-	사이판 오션뷰빌 5일 ₩679,000-	사이판 오션뷰빌 5일 ₩599,000-	사이판 오션뷰빌 6일 ₩1,070,000-	사이판 PIC 4/5/6일 ₩849,000-
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보물찾기 이벤트

보물찾기 이벤트

사이판 마리아나에 숨겨진 보물들!

사이판 왕복 항공권 1대	다이내믹 호텔 숙박권 1대
₩300,000	₩100,000

Network TV Coverage for the CNMI



KBS "Community Athletes": \$8.2 million



MBC "We Got Married": \$6.2 million



CJ TV "Dancing 9" Airing on July 18 & 25: estimated value: \$1.5 million



Media Fam Trips

Total unpaid media coverage generated this fiscal year-to-date: \$18.8 million



Blogger FAM Tour



말하는 대로~

이루어지는
마리아나 제도(사이판/티니안/로타)
커플 맞춤 여행 이벤트



SONY make.believe

소니 하이엔드 카메라
RX 포토그래퍼 모집

ZEISS



선정된 분께 마리아나 제도 출사 기회📷를 드립니다.

지원하기





2014-15 Korea Marketing Plan





Challenges:

- Lack of hotel rooms in the CNMI
- Increased LCC air seats to Guam at low seat prices via Jin Air and Jeju Air
- Lack of new developments or new openings in the CNMI
- The Sewol ferry tragedy in April hit private consumption and travel

Opportunities:

- New daily flights by Jeju Air between ICN/SPN from October 2014
- 117 Holidays in 2014 including weekends
- Strong Korean Won against the US Dollar
- Investment into the CNMI by the E-LAND Group





- **#1 Market:** for FY2014-15, the Korea team is targeting to become the number one source country for the CNMI in terms of visitor arrivals
- **Research-based Strategy:** now conducting comprehensive consumer research and utilize the research results in shaping future marketing strategies
- **Vibrant/Dynamic Destination:** position the Marianas as a vibrant dynamic travel destination which is growing once again via the Sports Island and Flower Island/Nature Paradise positioning
- **Segment Campaigns:** develop targeted promotions reaching key segments including MICE, Golf, Sports, Diving etc in co-op with key travel trade partners



Korea Marketing/PR Plan



- **TV HOME SHOPPING CAMPAIGN:** continue to promote the Marianas via TV home shopping channels in co-op with airlines
- **SOCIAL MEDIA CAMPAIGN:** increase sales volume of tour packages via increased investment in social commerce channels
- **ONLINE PROMOTIONS WITH ASIANA AIRLINES:** boost individual ticketing through Asiana's website and SNS channels
- **ONLINE PROMOTIONS WITH JEJU AIR:** promote the launching of new daily flights to Saipan through Jeju Air's website and SNS tools
- **SAIPAN AD CAMPAIGN:** increase awareness of the Marianas via joint ad campaign with Jeju Air to launch the new flight service
- **TINIAN & ROTA AD CAMPAIGN:** increase awareness of Tinian & Rota in the Korea market





- **BOOST NETWORK TV COVERAGE:** negotiate with all major TV networks to shoot in the CNMI with celebrities to position the Marianas as a desired travel destination targeting a mass market Korean audience
- **CO-OP WITH THIRD PARTY PARTNERS/CONSUMER BRANDS:** work with third party partners to carry out tie-in campaigns and secure huge amount of unpaid exposure
- **GUIDE BOOK MOBILE APP FOR ANDROID & APPLE:** launch mobile application of the guidebook for easy and free download and carry a useful interactive guidebook in the CNMI
- **MICE GROUP SUPPORT PROGRAM:** to promote MICE group travel to the Marianas as an ideal destination for corporate meetings and incentive group travel
- **GOLF INCENTIVE PROGRAM:** develop golf product incentive program to encourage sales and support travel agents to sell the Marianas as a top golf destination for Koreans



Korea Opportunities to Partner



Program	Title	Date	Opportunities to Partner
Trade Shows	Hana Tour Int'l Travel Fair	May	Booth Set-up
	BITF	September	
	Mode Tour Int'l Travel Fair	October	
	Road Show in Seoul and Busan	June or July	Distribution of collaterals
Trade FAMs	Mega FAM Tour with Asiana	July	Rooms, Meals, Activity, Transportation, etc.
	MICE Client FAM Tour	September	
Media FAMs	Major Trade Media FAM	March	
	Individual Consumer Media FAM	Year-round	
Consumer Promotions	Co-op Promotions with 3 rd Partners	Year-round	Rooms, Meals, Activities, etc.
PR	Guide Book Update	Jul to Sep	Information and Ad
	Network TV Filming	Year-round	Room, Meal, Activity, Transportation, etc.
	E-Marketing (Newsletter, Social Media)	Year-round	Your news
	Press Releases	Year-round	

MVA Korea Team



MVA Korea Team

Left to right: Irene Lee, Director; Chris Shin, Marketing Manager; Kate Lee, PR Manager



China Market Update



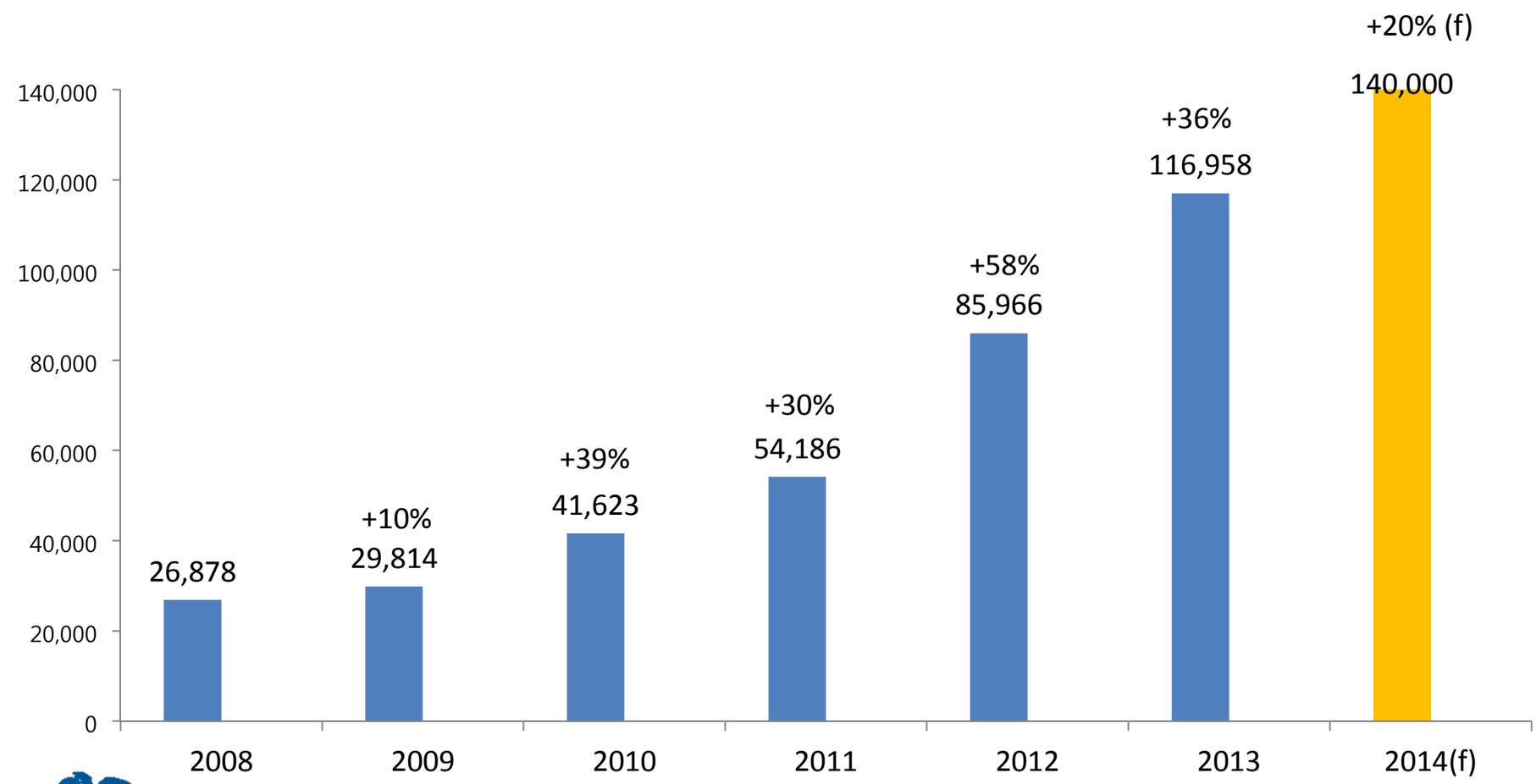
China Economic Overview



- **Population:** People's Republic of China (PRC) is the world's most populous nation with a population of over 1.36 billion
- **Huge Potential:** only 7% of China's population is traveling outbound each year, suggesting huge continued potential for growth out of China in the coming decade – China's outbound market is expected to double by 2020.
- **Economic Growth:** China's economy grew 7.7% year-on-year in 2013, beating the government's target of 7.5%.



Chinese Arrivals to the CNMI



Airlift to the CNMI from China



- **ESTABLISHED FLIGHTS:** China enjoys 8 weekly non-stop flights from Beijing, Shanghai and Guangzhou to the CNMI
- **NEW BEIJING FLIGHTS:** an extra two weekly direct non-stop flights from Beijing to Saipan were launched on May 2 by China Eastern in conjunction with Century Tours which are expected to be converted to regularly scheduled services in 2014
- **NEW HONG KONG FLIGHTS:** new direct non-stop flights between Hong Kong and Saipan were launched on May 18 by Dynamic Airways in conjunction with Century Tours with one flight every five days
- **AIRLIFT INCREASE:** this represents a 34% increase in airlift out of the China market to the CNMI over the past 12 months and is the key driver behind the continuing rapid growth of arrivals out of the China market to the CNMI





2013 China Program Highlights



- **ROAD SHOWS & SEMINARS:** to educate travel agents and to strengthen MVA's partnership with CNMI partners, Century Tours, Tinian Dynasty and major travel agents, MVA China has so far carried out over 20 road shows and seminars in key gateway cities and Tier 2 markets.



- **FAM TOURS:** MVA China cooperated with the Chengdu representative office of Asiana Airlines to organize an inspection tour for top local travel agents selling CNMI tour products to promote Saipan/Tinian/Rota tourism in Sichuan.



- **CITM 2013 in Kunming:** to promote the tourism resources of CNMI properties in China's south-west region, MVA China attended China International Travel Mart (CITM) 2013 in October. The mart attracted almost 100 exhibitors, 1,200 registered buyers and over 2,000 professional visitors. MVA China attended the mart with Century Tours and Tinian Dynasty as part of the broader Brand USA presence.



- **World Travel Fair (WTF) 2013:** MVA China Office co-operated with Century Tours, Tinian Dynasty and Hyatt Regency Saipan to set up an NMI booth to communicate with trade partners, media and consumers. An NMI delegate group also attended the exhibition and dealt directly with trade and public attendees. More than 38,000 visitors and over 500 exhibitors from 55 countries participated.



Consumer Promotions



- **CO-OP PROMOTIONS WITH 3RD PARTNERS:** MVA China carried out co-op promotions with various consumer brands, such as Johnny Studio, Tian'an Golf Club, Raffles City Shopping Mall and Canon camera to increase destination awareness of Marianas via their marketing/PR channels.



Network TV Promotions

- **Co-op Media Fam:** to promote charter flights from Beijing and Tianjin, MVA China worked with Century Tours to organize a Fam for three major media outlets from Northeast China. The media group included Jilin TV's "Fashion Travel," Chang Chun TV's "Food and Amusements" and HRB Art Radio.



Network TV Promotions



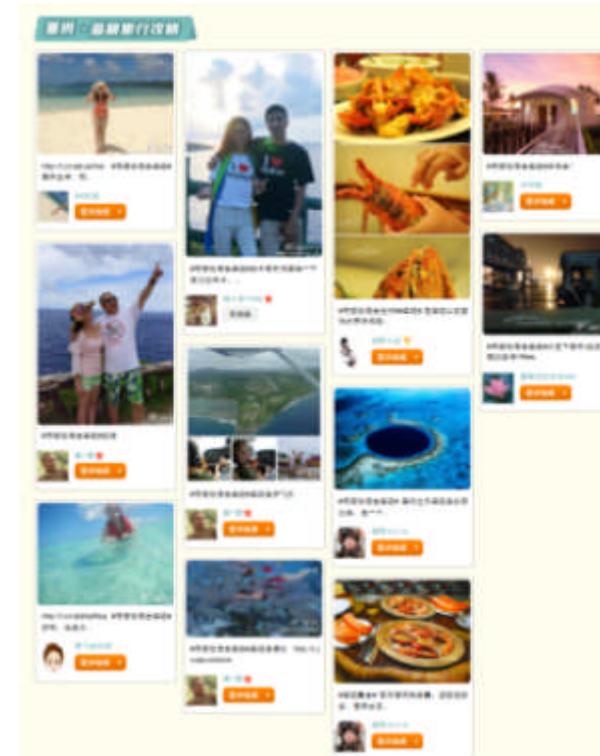
- **Shanghai Network TV Program:** to continue to promote CNMI's unique tourism resources, MVA China collaborated with Shanghai Network TV to produce a 50-minute program on Saipan and Tinian to be aired to an estimated 150 million viewers in China. The show is expected to yield an estimated \$1.3 million in advertising exposure for the Northern Mariana Islands on an unpaid basis.



Online Promotions



- **Travel with Weibo, Go around the World:** to further boost the CNMI's visibility on China's biggest online social media platform, MVA China's micro-blog attracted major nationwide consumer attention with stunning pictures of the destination supported by a wide range of Chinese visitors to CNMI sharing their travel experiences online with other prospective travelers.



Social Media Promotions



- **MVA Official Account on WeChat:** MVA China launched a new WeChat channel in China, now the country's hottest communication and social media platform. MVA China will provide regular updates on WeChat as well as Weibo to promote the abundant tourism resources of Saipan, Tinian and Rota.



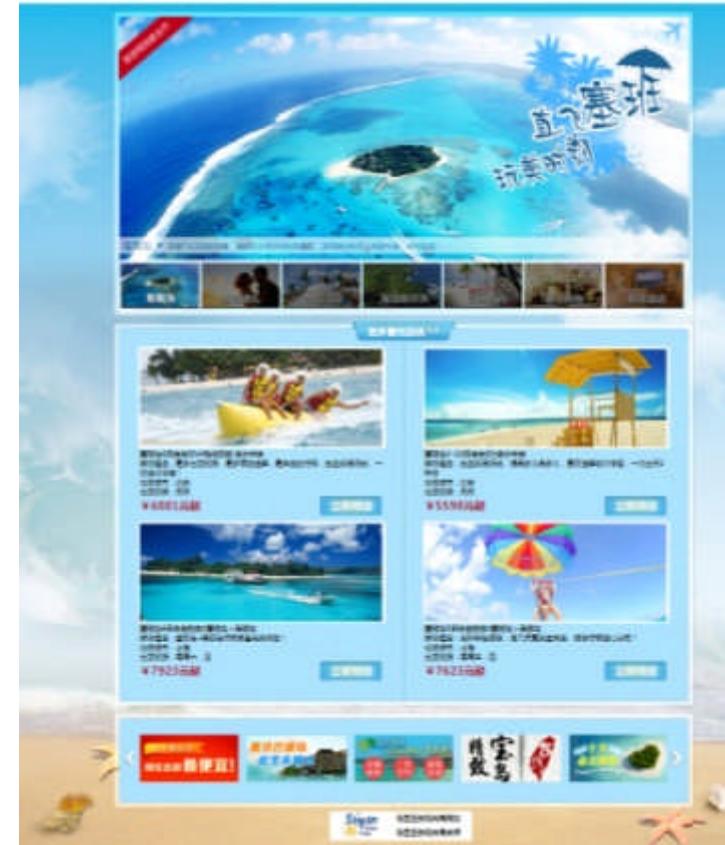
On-line Promotions

- **Channel Profile:** Sina is the most powerful on-line channel in China with 50 million page views daily, while its News Center has 30 million page views daily, and its Travel Channel has 27 million page views daily
- **Format:** variety of tie-ups with Sina.com to ensure maximum visibility for the CNMI.



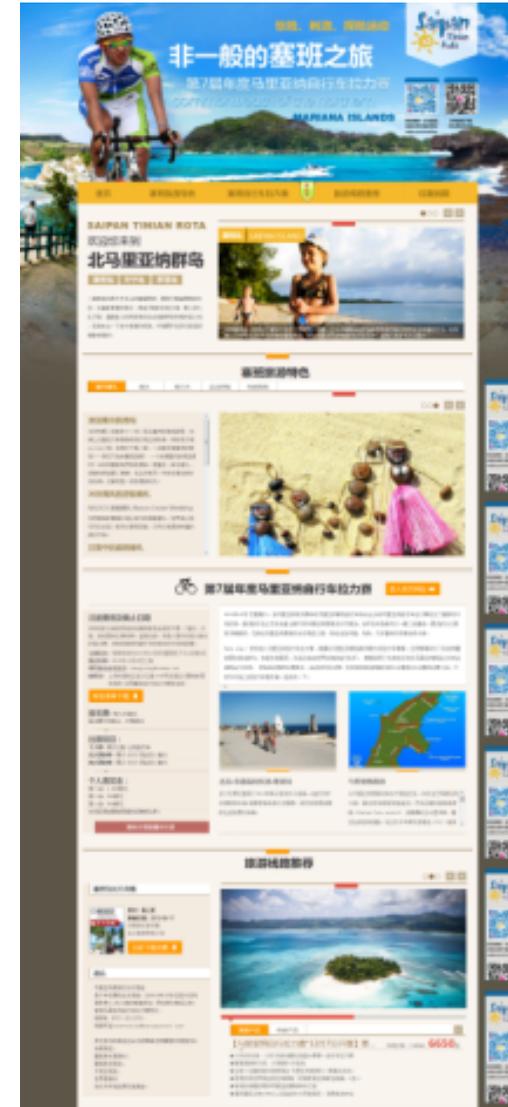
Online Promotions

- **Channel Profile:** As China's leading online travel service company, **Ctrip** provides over 50 million registered members with comprehensive services including hotel reservations, flight ticketing, packaged tours and corporate travel management. In addition, both business and leisure travelers who hold Ctrip memberships enjoy access to travel information and special discounts from preferred businesses throughout China.
- MVA China co-operated with Ctrip.com to promote travel packages and ensure maximum visibility of NMI through website advertising, SNS interactive programs and e-newsletters.



Online Promotions

- **Co-op with Lvmama:** MVA China launched CNMI sports promotions with Lvmama.com, one of the leading online booking channels in China, to promote NMI sport-themed tour packages. Chinese participants were secured for the Hell of the Marianas held on December 7.
- The three high-level Chinese riders that MVA China organized to participate in HOM in partnership with Lvmama.com each placed in the top three of their respective categories. It was the first time for Chinese riders to participate and another step in the China strategy of positioning CNMI as Sports Islands with Chinese.



Social Media Promotions



- **Launch of MVA Official Mobile Phone APP:** MVA China launched the Northern Mariana Islands Official APP, an important and useful tool for Chinese visitors to download e-brochure information via their mobile phones and catch up on the latest travel information about Saipan, Tinian and Rota.





Network Radio Promotions

- **Beijing Radio Broadcast 103.9:** MVA collaborated with FM103.9 Beijing Communication Radio in January 2014 on a program to introduce the beautiful islands of Saipan, Tinian and Rota and the various water sports of Managaha island. The main messages emphasized the destination appeal for vacationers and honeymooners and the visa-free policy for Chinese visitors.



Outdoor Advertising

- **Tele-booth Advertising Co-op with Century Tours:** MVA cooperated with Century Tours to implement Tele-booth Advertising in Shanghai, covering 330 booths citywide.





Outdoor Advertising

- **Bus Advertising in Guangzhou:** to maximize awareness in Guangzhou of Saipan, Tinian and Rota as ideal island travel destinations for southern China market travelers, MVA China launched a co-op campaign with TDI for advertising on 15 buses from January 20 to end of March.





Multi-media marketing campaign

- To boost load factors on Beijing charter flights January-March and with a focus on the low season, MVA carried out a series of marketing promotion activities, including metro and online advertising, outdoor billboards and online advertising.



- 86 pages of print coverage with a media value of US\$2.5 million
- Four TV episodes broadcast to 50 million viewers on 25 Chinese local television stations generating equivalent advertising value of US\$9 million
- Saipan Top 10 mobile phone APP - media value of US\$82,372
- Website equivalent advertising value to date of over US\$100,000





2014-15 China Marketing Plan





Challenges:

- Lack of hotel rooms in Saipan during peak seasons
- Lack of new development, new openings, destination improvements

Opportunities:

- China's outbound market is massive with huge potential for continued growth
- Challenging Korea to become the CNMI's #1 source market in 2015
- New flights launching from Beijing and Hong Kong to Saipan
- New airlines China Eastern and Dynamic Airways entering the China-Saipan market
- Target new secondary cities in 2015, including Shenyang, Tianjin & Hangzhou



2014-2015 Marketing Strategy



- **BOOST BRANDING/POSITIONING:** strengthen CNMI's positioning as "sport and flower islands" instead of just another "beach resort"
- **RETAIL CAMPAIGNS:** emphasize partnership with DFS and other retail partners given importance of shopping to Chinese visitors.
- **TINIAN & ROTA PROMOTIONS:** continue to develop Tinian and Rota's position as unique island destinations.
- **BOOST CO-OP ADVERTISING:** launch increased number of co-op campaigns with travel agent, airline and brand partners in the China market
- **INCREASE INVESTMENT IN SOCIAL MEDIA:** boost social media presence on Sina Weibo and WeChat to provide in-depth information about NMI to users to stimulate interest and attract followers at minimal cost.



2014-15 KEY PROGRAMS



- **Boost Guangzhou/South China Investment:** leverage the existing Guangzhou flights and new Hong Kong flights with a increasing investment in the Guangzhou/South China market with an expanded MVA team in Guangzhou.
- **Partner Training:** launch seminars and sales calls in Shanghai, Guangzhou and Beijing with NMI travel trade partners and suppliers.
- **MVA Training Academy:** launch on-line MVA training program, targeting travel trade professionals and media to educate them on the unique tourism resources of NMI.
- **Major Co-op campaigns with travel trade partners:** cooperate with travel trade partners such as Ctrip, CITS, JJ, etc to launch joint CNMI promotional marketing campaign.
- **Marketing campaigns with Century Tours & Tinian Dynasty:** cooperate with these two key China partners to launch CNMI promotional marketing campaigns involving road shows and seminars in the China market.



2014-15 KEY PROGRAMS



- **Brand USA Road Show:** Participate in Brand USA road shows, targeting gateway cities and Tier 2 markets
- **Boost Media Exposure:** via unpaid PR push targeting nationwide travel magazines, paid travel trade media advertising, outdoor campaigns
- **KOL Campaign:** launch KOL (key opinion leader) campaign to maximize the number of followers on MVA's Weibo and WeChat.
- **Consumer Events:** co-op with TDI and Century Tours to host consumer promotions to promote charter flights and increase bookings to NMI.
- **Marketing campaign with Golf & Sports clubs:** launch co-op campaigns with major China golf clubs to promote the CNMI's golf resources and with sports clubs to promote the CNMI as a Sports Paradise.



China Opportunities to Partner



Program	Title	Date	Opportunities to Partner
Trade Fams	Educational Fam with Centours and Tinian Dynasty to expose NMI tourism resources in Beijing, Shanghai & Guangzhou	Year-round	Rooms, Meals, Activity, Transportation, etc.
		Year-round	
Media Fams	Educational Fam with Centours and Tinian Dynasty to expose NMI tourism resources.	Year-round	
MVA China Sales Mission	Co-op with Tinian Dynasty and Century Tours	April	Host functions to meet Chinese tour operators
Consumer Promotions	Co-op Promotions with 3 rd Parties	Year-round	Rooms, Meals, Activities, etc.
PR	Guide Book Update	Feb. to Mar.	Information and Advertising
	E-Marketing (Newsletters, Social Media)	Year-round	Your news
	Press Releases	Year-round	



China Opportunities to Partner



Program	Title	Date	Opportunities to Partner
Trade Shows	Guangzhou International Travel Fair	March	MVA China establish booth with brochure display to meet with qualified travel trade and media partners
	Asia Golf Show, Beijing	March	
	Shanghai World Travel Fair	May	
	China International Travel Mart	November,2014	
	IT&CM, Shanghai	April	
	Beijing Int'l Travel Expo (BITE)	June	
	ITE, Hong Kong	June	
	Wedding shows in Beijing, Shanghai and Guangzhou	April, May, September	
	Beijing International Dive Show	May	



MVA Shanghai Team



MVA Shanghai Team

Left to Right: Mito Qi, Travel Trade Marketing Manager; Tina Yao, General Manager; Jacky Zhu, China Marketing Director; Winnie Wang, PR Manager

Winnie Wang, PR Manager



MVA Beijing Team



MVA Beijing Team

Left to right: Sunday Wang , PR Manager; Jill Wang, Travel Trade Marketing Manager; Lily Zhu, MICE Marketing Manager

Winnie Wang, PR Manager

MVA Guangzhou Team



MVA Guangzhou Team

Diana Liu, Marketing Director, South China
Jason Zhou, PR & Marketing Manager





2013 Taiwan Highlights



MVA Taiwan Launch – October 2013



- MVA Managing Director Perry Tenorio opened the MVA Office in Taiwan on Oct. 22, 2013, to promote the CNMI in the Taiwan market.



MVA Taiwan Launch



6 TV Networks, 18 online and print media, Top 10 travel agencies, 3 airlines



Taipei International Travel Fair (TITF) 2013



Taipei International Travel Fair – the largest travel show in Asia attracting over 300,000 visitors. MVA Pavilion voted “Most Popular Pavilion” in its first year.



Taipei International Travel Fair (TITF) 2013



- MVA Booth at the TITF 2013 American Pavilion
- TITF 2013 Press Conference
- American Pavilion Opening Ceremony



Taipei International Travel Fair (TITF) 2013



- New CNMI Tour Packages
- CNMI & Guam Tour Packages

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Consumer Campaign



- To increase the awareness of The Marianas as a popular vacation destination for media, travel trade partners, and visitors with ongoing campaign “Intern to the Marianas” from October 2013 to January 2014.



Marketing and PR Activities



- The “Intern to the Marianas” Campaign Final Stage : MVA Taiwan hosted a press conference at the Shangri-la Hotel with 7 TV networks, 16 online and print media on Jan. 14 to introduce the CNMI as the most welcome destination for Taiwanese travelers. The news was not only published in Taiwan but also had transformed into more than 50 online news in simplified Chinese (used in Mainland China) on major websites.





Total PR Value Secured

Month	Value
October 2013	\$363,000
November 2013	\$337,000
December 2013	\$376,500
January 2014	\$653,200
February 2014	\$239,500
March 2014	\$48,900
April 2014	\$125,000
May 2014	\$222,100
Total PR Value	\$2,365,200





2014 Taiwan Highlights



Travel Trade Marketing



- **TRADE SEMINARS:** to educate Taiwan's travel agents and to strengthen MVA's partnership with CNMI partners, Century Tours, Tinian Dynasty and major travel agencies, MVA Taiwan joined ANTOR (Association of National Tourism Office Representatives in Taiwan) and Taiwan Travel Agents Association's joint Trade Seminars in the major cities of Kaohsiung, Tainan, and Taoyuan in April 2014.



- **TRADE SEMINARS:** to educate Taiwan's travel agents and to strengthen MVA's partnership with Asiana Airlines and key travel agencies, MVA Taiwan joined OZ SPN PAK featuring the CNMI Tour Packages operated by Asiana Airlines to be promoted in the Taiwan market from June to December 2014.



ASIANA AIRLINES 

2014 Taipei Tourism Expo (TTE)



- **MVA Booth at "Taipei Tourism Expo 2014" American Pavilion organized by Discover America - Taiwan:** Taipei Tourism Expo (TTE) 2014 was held on May 23 to 26 at the Taipei World Trade Center. Marianas Visitors Authority participated in TTE 2014 by joining the popular American Pavilion to show the variety of island lifestyle and to promote CNMI as extraordinary island destination to the Taiwan market.



2014 Taipei Tourism Expo (TTE)

- **2014 Taipei Tourism Expo (TTE)** : TTE 2014 visitors reached 260,000, a 14% increase to last year's 227,000. TTE this year generated sales reaching US\$106 Million. The American Pavilion was set up in a central and strategic location. A significant surge in booking volume was reported during the four-day travel fair, exceeding the exhibitors' expectation.



Marketing and PR Activities

- The “Intern to the Marianas” Campaign Winner to the 9th Saipan Marathon : MVA Taiwan Internship Winner Sunny Lin travelled to the CNMI & participated in the 9th Saipan Marathon accompanied by selected Taiwan media to cover the Saipan Marathon plus other attractions and activities in The Marianas undertaken by Sunny to boost the media exposure in Taiwan. Sunny placed 3rd in one category.



- The competition has generated exposure from a total of 32 TV network programs , 8 print coverage, and more than 400 online news channels generating an ad value of over \$1.2 million, earning public attention since MVA Taiwan launched its office in October 2013.



Online Campaign

- **Online Campaign “Love in Tinian:** to create a romantic getaway destination targeting couples, lovers, families and potential visitors, MVA Taiwan started a new promotional campaign titled "Love in Tinian" from May 23 to September 9 to increase awareness of Tinian Island in the Taiwan market.
- The winners of the campaign will receive a 3 night accommodation at the Presidential Suite and flight tickets from/to Saipan to/from Tinian as Grand Prize sponsored by Tinian Dynasty Hotel & Casino. The campaign will last for 3 months to continually stimulate interest for the Mariana Islands as a high-end romantic destination for Taiwanese travelers. The campaign will last for 3 months to continually stimulate interest for the Mariana Islands in the Taiwan market, and generate new bookings to the CNMI.



Media FAM

- Golf Media :** MVA Taiwan arranged 3 golf and 1 lifestyle media to experience golf courses in Saipan and Rota on March 23-28 to cover the major golf courses exposures and provide the updated information about themed travel products on the CNMI to Taiwan market.



Media FAM

- **STAR TV “Cooking My Way”** : to maximize media exposure on The Mariana Islands, one of Taiwan’s major TV networks featured The Marianas as an ideal gourmet destination. MVA Taiwan negotiated with STAR TV (Fox International) for their TV show coverage on the CNMI, and arranged filming in The Marianas on May 10 to 15. The show aired on May 31 and June 7.



Media FAM

- **“Marianas Vow Renewal and Blessing Ceremony”**: A special activity arranged by MVA is the traditional Chamorro & Carolinian style Vow Renewal and Blessing Ceremony celebrating the 20th wedding anniversary of MVA Taiwan Director. Taiwan media in this Fam Tour covered the event to promote the romance market in Taiwan. This activity will be an option offered to be included in The Marianas Tour Packages.





2014–15 Taiwan Marketing Plan



Taiwan Challenges & Opportunities



Challenges:

- Lack of direct flight service between Taiwan and Saipan
- Lack of larger means of transportation between Saipan and Tinian and Rota

Opportunities:

- One of the most attractive island destinations for Taiwanese
- New CNMI tour package development in Taiwan
- Charter flights from Taipei to Saipan or Tinian key target for FY14-15
- Access to Taiwan via the new Hong Kong flights



MVA Taiwan Team



MVA Taiwan Team

Left to Right:

Eileen Chen, Marketing Executive

Jemy See, Supervisor

Milane Tsai, PR & Marketing Manager





Japan Market Update

- **ABENOMICS:**
 - New Prime Minister Abe's economic policy of "Abenomics"
 - Based on "the three arrows"
 - 1) Pump liquidity into the financial system until annual 2% inflation is achieved
 - 2) Boost public works spending and stimulus
 - 3) Speed deregulation of employment laws, online sales, overseas trade

- **CONSUMPTION TAX INCREASE:**
 - From April, the national sales tax was boosted from 5% to 8%
 - 46% of Japanese households are reducing household expenditures after the consumption tax increase



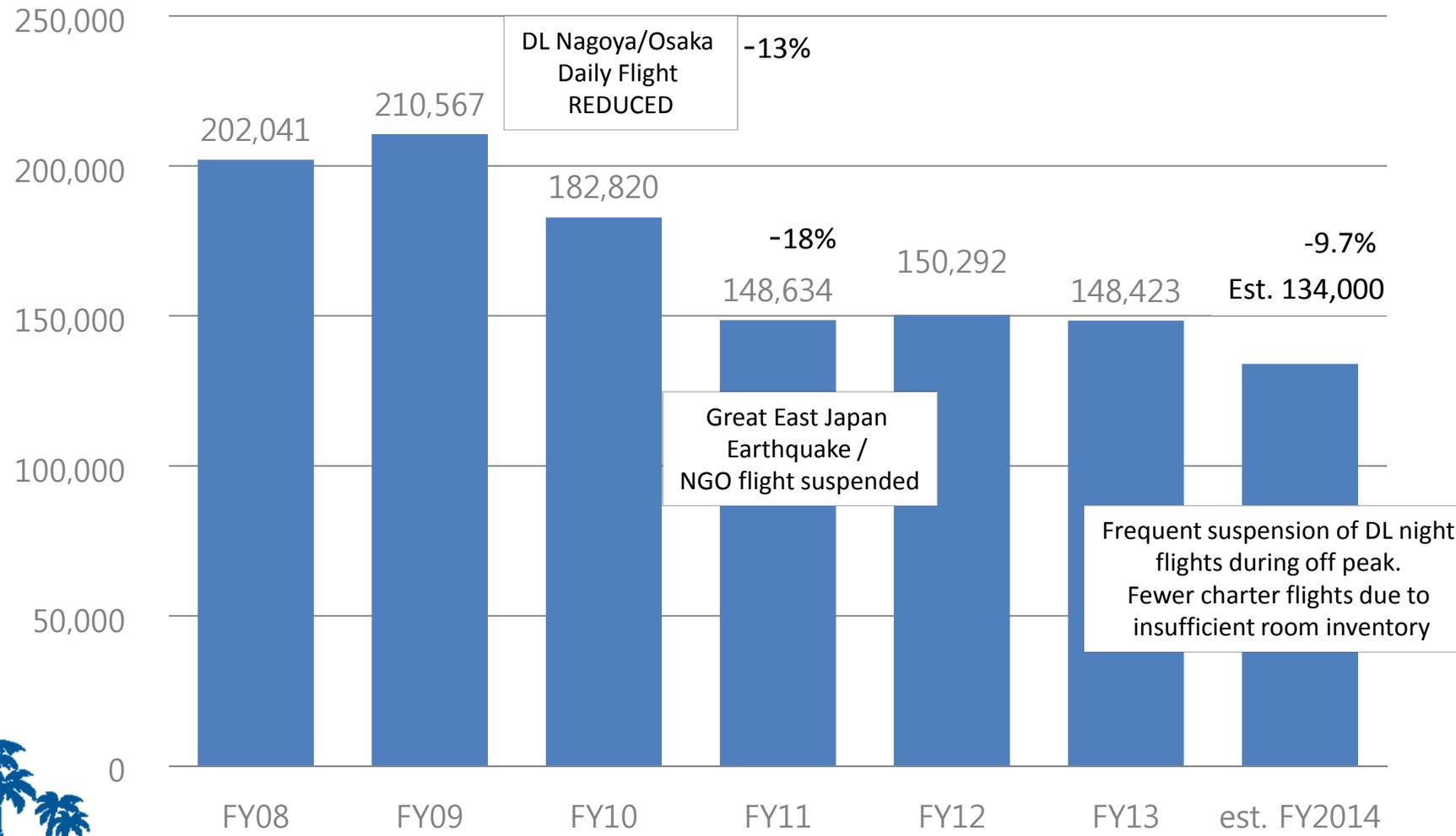
Japan Outbound Travel Overview



- **2013 OUTBOUND TRAVEL:** 17.4 million Japanese travelled overseas in 2013, down 5.5% due to the weaker yen, economic uncertainties, and tensions with China & Korea.
- **2014 TREND:** after a 5.5% decline in 2013, Japan's total outbound market is already down a further 4% in 2014 year-to-date through May.
- **EXCHANGE RATE:** the U.S. dollar has appreciated by 32% versus the Japanese yen over the last 2 years, making travel to the CNMI effectively 32% more expensive for Japanese today than it was 2 years ago.
- **FUEL SURCHARGES:** Delta Air Lines has raised their fuel surcharge on flights from Narita to Saipan this year from Yen 7,000 to Yen 8,000 (\$78) per passenger per flight – for \$320 in fuel surcharges for a family of 4.



Japanese Arrivals to the CNMI





Airlift from Japan

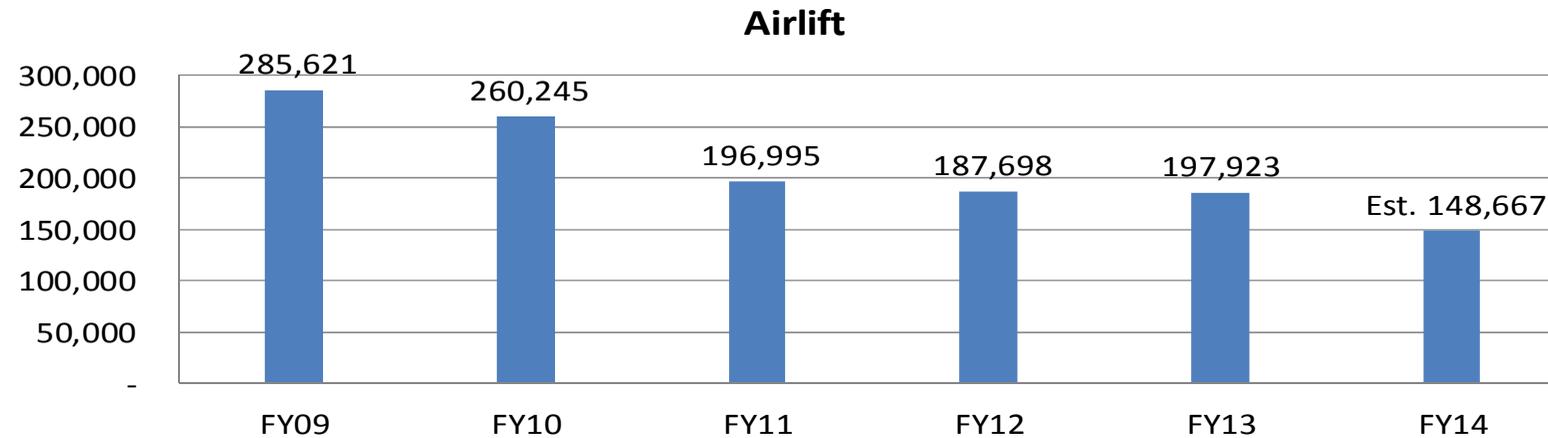
- **NARITA FLIGHTS:**
 - Delta Air Lines is the CNMI's key airline partner out of the Japan market
 - Operates double daily service from Narita
 - Delta Air Lines also offers a third flight in the peak season
 - Reduction in night flight services during off peak seasons
 - Asiana Airlines launches charter flights during key holiday seasons

- **OSAKA FLIGHTS:**
 - Asiana Airlines operates seasonal services from December to March, Japan's Golden Week (late April and early May) and summer holidays
 - MVA Japan is approaching Asiana to launch year round operations and use a larger 250-seat aircraft, instead of a 177-seat aircraft

- **NAGOYA FLIGHTS:**
 - Delta Air Lines operates charter flights during peak travel periods
 - MVA Japan's key objective for 2014-2015 is to secure regular year-round services from Nagoya



Airlift from Japan



- **AIRLIFT DEVELOPMENT:**

- As in Korea and China, the key to building arrivals out of the Japan market is to rebuild airlift:
 - Nagoya: year-round service
 - Osaka: year-round service
 - Narita: additional flights





2013 Japan Marketing Programs



Travel Trade Marketing



- **TRAVEL AGENTS:** 90% of bookings to the CNMI are made through travel agents, with 73% of travel agent bookings made through the top 20 agencies and the Top 2 Japanese travel agents, JTB and H.I.S. representing 35% of Japan's total outbound travel market. As a result, MVA Japan works closely with key travel trade partners to educate and encourage them to produce and sell a greater variety of tour products to the CNMI.
- **MVA TRADE SEMINARS:** 17 seminars and workshops training hundreds of key travel agents in Tokyo, Osaka, Nagoya, Sapporo, Sendai, Niigata, Hiroshima and Fukuoka in 2013.
- **IN-HOUSE SEMINARS:** to educate retail staff, MVA Japan conducted in-house seminars, with major travel agencies including JTB World Vacations for retailers of packages and Kinki Nippon Tourist for corporate sales staff.



Travel Trade Marketing



- **JAPAN MARIANAS TOURISM CLUB (JMTC):** networking with general managers of major wholesalers and airlines to promote CNMI tourism and organizes regular JMTC meetings in Saipan and Tokyo.
- **REGULAR SALES CALLS:** MVA Japan runs an aggressive schedule of sales calls to the travel trade to negotiate various promotional programs in Tokyo, Nagoya, Sapporo, Sendai, Niigata, Hiroshima and Fukuoka.



- **AGENT FAM TOURS:** arranged agent fam tours, targeting both tour planners and online agents at leading travel wholesalers and retailers throughout Japan to provide them with hands-on travel experience, most recently the Delta Airlines JTB J-net FAM tour in April → planning to increase number of fams in 2014-2015.
- **DELTA AIR LINES NARITA CO-OP PROMOTION:** MVA Japan and Delta Air Lines cooperated to produce paper fans. The design consists of a beautiful Managaha photo with the MVA logo on one side and a photo of aircraft flying in the sky with Delta Air Lines' logo on the other. MVA Japan and Delta Air Lines distributed these fans at various tourism promotions in Tokyo and at major travel agent retail outlets.



Media Fam Trips



- **MEDIA VISITS:** MVA Japan regularly negotiates with leading travel/lifestyle publications and popular TV shows to visit the CNMI to create media footage focusing on tourist attractions around the islands. MVA Japan arranged a total of **19 separate media visits** to the CNMI year-to-date in FY2014 generating media coverage with an unpaid media value of over **\$ 10 Million** as of June 2014.



On-line Promotions



- **JAPAN WEBSITE LAUNCH:** a completely renewed MVA Japan website and photo gallery was re-launched with a new design and images compatible with various devices including smartphones and Tablet PCs.
- **SOCIAL MEDIA MARKETING:** managed major social media platforms such as Facebook and Twitter. Also MVA Japan conducted a giveaway campaign to increase the number of followers of these accounts.





2014/15 Japan Marketing Plan



Japan Challenges & Opportunities



Challenges:

- Insufficient hotel rooms allocated to the Japan market
- Smaller aircraft to secure air seats for groups from Narita
- Frequent suspension of Delta night flights from Narita
- Seasonal operations from KIX and limited charter flights from Nagoya
- Lack of seats from Guam to Saipan to attract passengers from UA gateway cities in Japan
- Unstable flight services from Saipan to Tinian and Rota
- Increasing number of LCCs to other short haul destinations that are competitively priced

Opportunities:

- Findings from the recent consumer survey show deep appeal of the CNMI for Japanese
- Beautiful Flower Islands Project
- Must secure launch of LCC service to the CNMI





- **REBOOT JAPAN STRATEGY:** based on the findings from consumer research conducted in May 2014, all the Japan marketing strategies are being reviewed to rebuild the Japan market.
- **NEW AIRLIFT ABSOLUTELY CRUCIAL:** the single most important key is to boost air seat capacity between Japan and the CNMI and re-energize the travel trade with LCC service available.
- **NEW BRANDING/MESSAGING:** stimulate travel demand to the CNMI with the key messages of “Beautiful Flower Islands” and “Saipan, Tinian and Rota – Sports Paradise”
- **CULTURE PROMOTIONS:** promote local events, Chamorro/Carolinian culture, and undiscovered nature of Rota and Tinian to attract the attention of Japanese travelers.
- **SEGMENTED CAMPAIGNS:** develop campaigns targeting specific target segments, including active seniors, young families, students, golf, diving as well as the wedding market.



2014-15 PROGRAMS – AIRLIFT TARGETS



- **Delta & Asiana** – key legacy carriers
- **Vanilla Air (formerly AirAsia)**
 - New low-cost carrier
 - Double-daily from Narita to Taipei and Daily from Narita to Seoul
 - Acquiring 8 aircraft in 2014 and 10 aircraft in 2015
- **Peach Aviation (part of ANA Group)**
 - New low-cost carrier with Okinawa and Kansai hubs
 - 6 international routes
- **Spring Airlines (China)**
 - 3 domestic Narita flights launching from next August
- **Air Asia Japan (Thailand)**
 - Launching new service in 2015 together with Rakuten out of Haneda or Narita (not yet decided)
- **Dynamic Airways (USA)**
 - Basing aircraft on Saipan and launching flights from Korea, China & Hong Kong



2014-15 KEY PROGRAMS



- **NEW CNMI VIDEO ASSETS:** addition of new “Flower Island” video footage from Saipan, Tinian and Rota for TV, Online and Print media, showcase events and seminars, nationwide consumer promotional events etc.
- **NEW DESTINATION TRAINING PROGRAM:** in line with the Flower Island positioning, develop new set of destination training contents for all travel trade educational platforms – joint JATA training, new online training platform etc.
- **BOOST FAM TRIPS:** increase the number of trade and media fam trips to the CNMI in order to introduce key tour planners and media partners to the new positioning of the CNMI as the Flower Islands.
- **JOINT TRAVEL AGENT & AIRLINE PROMOTIONS:** boost number of co-op/joint promotions with major Japan travel trade and airline partners on the Flower Island positioning.



2014-15 KEY PROGRAMS



- **BOOST OTA FOCUS:** Encourage more OTAs to create Northern Marianas package tours in conjunction with the launch of new LCC service.
- **SOCIAL NETWORKING & ONLINE CAMPAIGNS:** boost the CNMI's social media presence focusing on Twitter, Facebook, mega-blogs, and a variety of online travel portals to generate on-line buzz.
- **JOINT APP DEVELOPMENT WITH KOREA:** develop Japanese language wifi enabled smartphone app so that Japanese visitors will be able to capture logos on Saipan in the app, and obtain exclusive discounts and services.
- **EXPAND BRAND TIE-UPS:** boost tie-ups with companies such as Otsuka Pharmaceuticals (Sports drinks), Toyota, Universal Music Japan, MTV Japan, Toho Entertainment, and all major TV channels, to increase the number of TV commercials, TV programs, music videos etc. shot in the CNMI.



Japan Partnership Opportunities



Program	Title	Date	Opportunities to Partner
Trade Shows Seminars	Japan Golf Fair	February	Booth Set-up
	JATA Tourism Expo	September	
	Marianas Seminar & Workshop	June	Distribution of collaterals
Trade FAMs	JTB FAM from Tokyo/Osaka	March/April	Rooms, Meals, Activity, Transportation, etc.
Media FAMs	Major Nationwide TV Filming “Hirunandesu”	June	
	Individual Consumer Media FAM	Year-round	
Consumer Promotions	Co-op Promotions with 3 rd party partners	Year-round	Rooms, Meals, Activities, etc.
PR	TV Filming	Year-round	Room, Meal, Activity, Transportation, etc.
	E-Marketing (Newsletter, Social Media)	Year-round	Partner’s latest information
	Press Releases	Year-round	





MVA Japan Team

(Left to right): Kimiko Tasaki, Travel Trade Manager ; Naoya Asao, Travel Trade Manager
Shigeru Nakamura, Travel Trade Director; Tomo Shimada, General Manager
Akira Takatsu, PR Director; Naoko Hashizume, PR Director,





Russia Market Update





- **ECONOMIC GROWTH:**
 - In 2012, Russia's economy showed its first signs of slowdown, growing at 3.4%
 - In 2013, GDP grew by only 1.3%
 - In 2014, with the Ukraine crisis, foreign sanctions, capital flight, and weak consumer confidence, the economic outlook for the Russian economy is highly uncertain

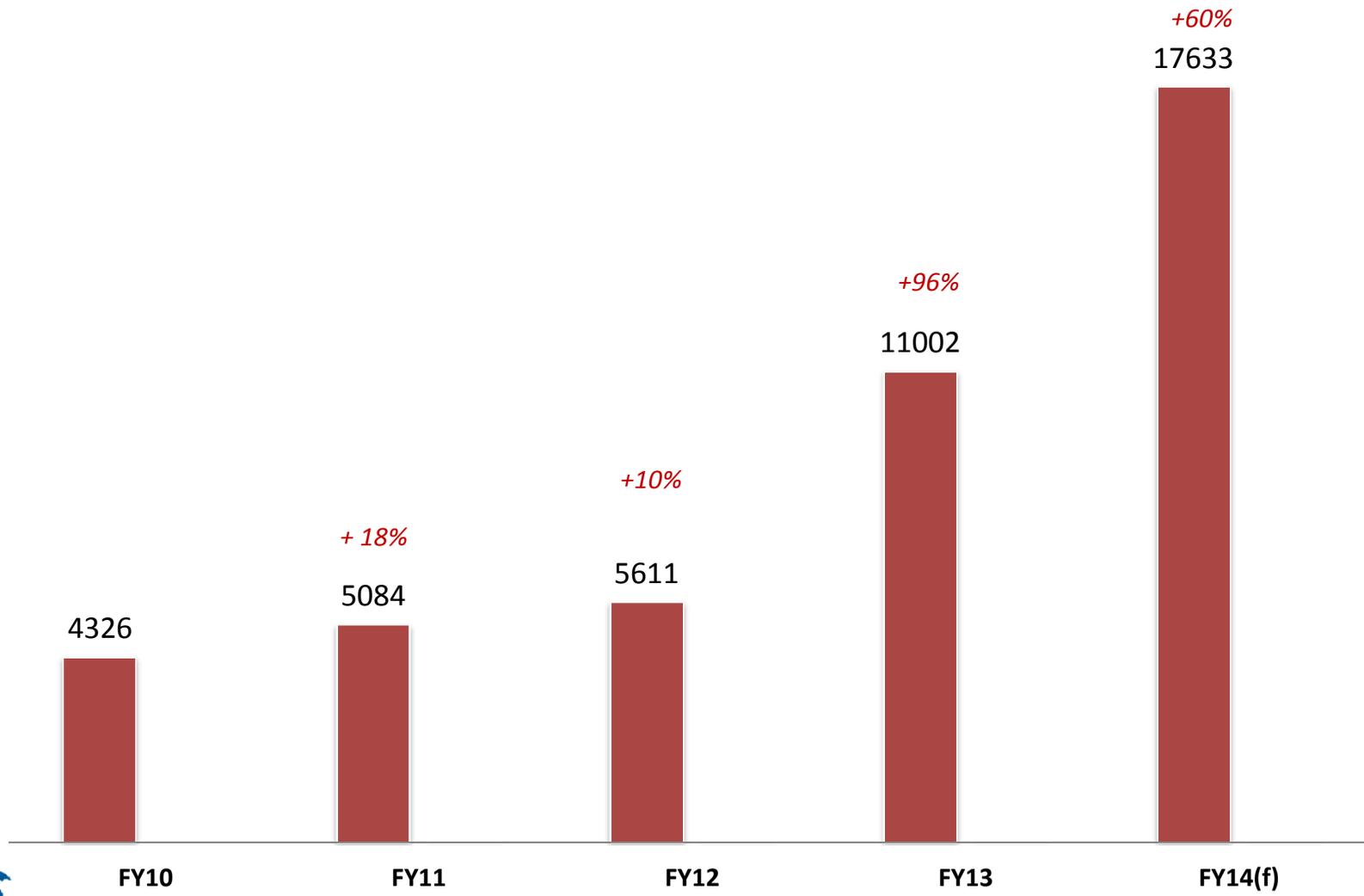
- **OUTBOUND TRAVEL:** Russian outbound travel has been growing 8-10% on average each year for the past decade but is projected to slow considerably in 2014.

- **TRAVEL TO THE CNMI:** by comparison, travel to the CNMI last year almost doubled to over 10,000 visitors, and so far this fiscal year, the Russian market is the CNMI's fastest growing market.

- **SPENDING IN THE CNMI:** in addition to being the CNMI's fastest growing market, Russian visitors are also the highest-spending visitors to the CNMI, spending on average \$4,129 per visit.



Russian Arrivals to the CNMI





2013 Russia Marketing Programs



MVA Vladivostok office launch



- Two MVA Russia offices were established in October 2013 in Moscow and Vladivostok to capitalize on rapid growth out of the Russia market, and leverage key partners in the Russia market including AVIACHARTERS and Asiana.



Travel Trade Marketing



- **TRADE SHOWS:** MVA Russia has participated in leading travel exhibitions all over Russia including:
 - Conde Nast Traveller Luxury Travel Fair - March 2014, Moscow
 - Moscow International Travel & Tourism (MITT) – March 2014, Moscow
 - Siberia International Travel & Tourism (SITT) – April 2014, Novosibirsk
 - Pacific International Travel Expo (PITE) – May 2014, Vladivostok

Condé Nast
Traveller
LUXURY TRAVEL FAIR



Mitt



Sitt



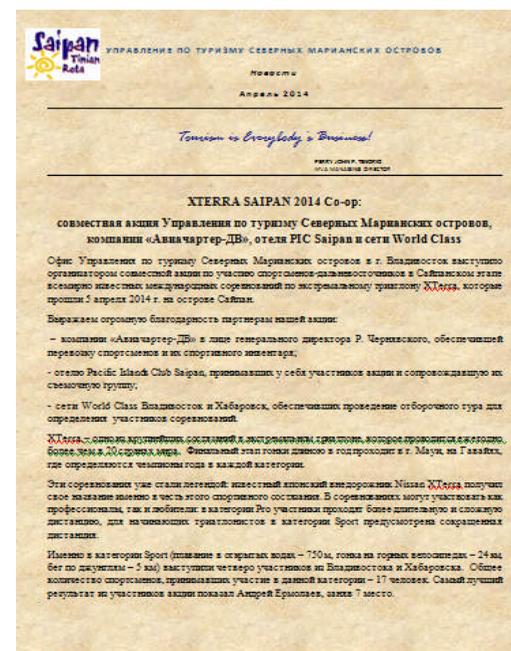
Тихоокеанская
международная
туристская
выставка Владивосток
PITE
Pacific International Travel Expo



Travel Trade Marketing



- **TRADE NEWSLETTERS:** MVA Russia has developed a monthly MVA newsletter, delivering the latest tourism information from the CNMI to over 300 key travel trade representatives selling tours to the CNMI from Russia.



Media Fam Trips



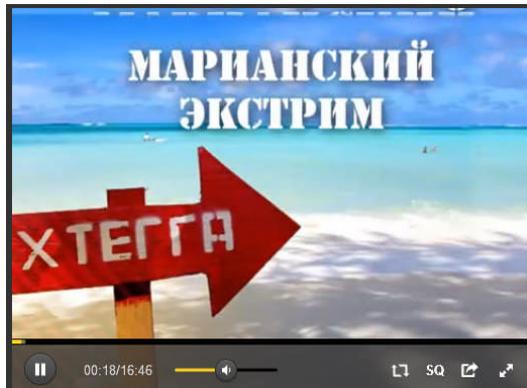
- **MEDIA FAMS:** MVA Russia has negotiated with the most powerful online and print media in Russia to visit the CNMI to create media coverage focusing on tourist attractions and events in the CNMI.
- **DESTINATION VIDEO SHOOTING:** MVA Russia initiated shooting of the first ever destination video on the CNMI in Russian to be used at trade shows, training seminars, and uploaded on the most viewed on-line video portals in Russia. Shorter promotional videos are being uploaded on travel agent Internet websites, featured in movie theatres prior to film showings, and used for various promotional activities of MVA Russia.



Sports Event Promotion



- **SAIPAN XTERRA CO-OP:** to generate more awareness of Saipan XTerra amongst professional sportsmen, beginners and general consumers, MVA Russia tied up with Aviacharter-DV, PIC Saipan and World Class fitness club network in Vladivostok and Khabarovsk to bring sportsmen to participate in XTerra Saipan 2014 in April. 4 sportsmen MVA Russia also invited most popular local Far East TV channel to Saipan to shoot news video and full time movie on Saipan XTerra.





2014-15 Russia Plan



RUSSIA CHALLENGES & OPPORTUNITIES



Challenges:

- Growing competition from Guam in Far East Russia
- Confusion of Guam as a part of the CNMI by travel agents and target travelers
- Insufficient hotel room allocations to the Russian market
- Economic stagnation is affecting Russian travel to the CNMI

Opportunities:

- Increased visibility and awareness of the Marianas in Russia with the opening of the new MVA offices
- New research just conducted to develop highly targeted Russia marketing plan
- New interline agreement between Aerflot and Asiana means new competitive pricing from Moscow and St. Petersburg via Seoul to the CNMI
- Korean visa waiver for Russians since January 1st 2014 opens new possibilities to develop combination routes with Asiana to the CNMI with short-term transit stay in Seoul



2014-15 RUSSIA MARKETING PLAN



- **SEGMENTED GEOGRAPHICAL APPROACH:** develop and carry out marketing programs targeting specific target segments depending on location across 9 time zones:
 - **Far East Russia market:** families with children and middle-aged tourists
 - **Central Russian market:** luxury, romance, divers, golfers, sports market

- **TRAVEL AGENT CO-OPS:** work with TAs to introduce new positioning of Saipan, Tinian and Rota in the Russia market.

- **AIRLINE PARTNERSHIPS:** work actively with major airline partners AVIACHARTER and Asiana to maintain airlift to the CNMI.

- **EVENT PROMOTION:** promote local sports and culture events in Saipan, Tinian and Rota to attract consumer's attention all over Russia.



2014-15 RUSSIA MARKETING PLAN



- **RUSSIA WEBSITE & SOCIAL NETWORKING SERVICES (SNS):** Regularly improve and update Russia website and develop popular and powerful MVA Russia Facebook page to provide in-depth information of the CNMI to online users, create interest and fans and establish the CNMI's brand positioning.
- **FAM TRIP ORGANIZATION:** bring key travel agent and media groups to visit all three islands to increase awareness of Tinian and Rota and boost sales of short-term trips to Tinian and/or Rota during their stay in Saipan.
- **ONLINE PROMOTIONS:** Strengthen online presence of the Marianas by creating content-rich marketing and PR programs on the web .
- **SPECIAL INTEREST TOURS (SIT):** promote SIT tours to the CNMI for travelers with a particular travel objective, such as golfing, triathlon, diving, or fishing (especially important for the central part of Russia).



Russia Opportunities to Partner



Program	Title	Date	Opportunities to Partner
Trade Shows Seminars	Conde Nast Traveller Luxury Travel Fair/ Moscow International Travel Trade Fair	March'15	Booth Set-up
	Pacific International Travel Expo	May'15	
	Moscow Luxury Travel Mart	September'14	
	Marianas Seminars & Workshops (Moscow, St. Petersburg, Far East Russia)	Sep-Nov'14 June'15	Introduction of "Saipan Plus" project, distribution of collaterals
Travel Trade FAMs	TO FAMs (Moscow & St. Petersburg TOs)	November'14	Rooms, Meals, Activity, Transportation, etc.
Media FAMs	Media FAMs from Moscow & Far East Russia	October'14 June'15	
Consumer Promotions	Co-op Promotions with 3 rd party partners	Year-round	Rooms, Meals, Activities, etc.
PR	TV Filming	Year-round	Room, Meal, Activity, Transportation, etc.
	E-Marketing (Newsletter, Social Media)	Year-round	Partner's latest information
	Press Releases	Year-round	



MVA Russia Team



MVA VLADIVOSTOK



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PR & Marketing Manager



Artem Latushkin
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MVA MOSCOW



Robert Obolgotiani
Country Manager



Victoria Mukranova
Tourism Director



Maria Grebennikova
PR & Marketing Manager





Marianas Visitors Authority China Representative Office

June 2014

THANK YOU!

