



2018
**GLOBAL
TOURISM
SUMMIT**

HAWAII TOURISM
AUTHORITY

*Charting the
Course*

#GTSHAWAII



OCTOBER 1-3
HONOLULU, HAWAII



Hawai'i Tourism Canada 2019 Brand Management Plan Overview

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Session overview

- ◆ Canada's Economic/Political Environment
- ◆ Market Trends
- ◆ Strategic Objectives
- ◆ Target Segments
- ◆ Key Leisure Programs
- ◆ Key MCI Programs





ECONOMIC & POLITICAL ENVIRONMENT



Canada's Economic / Political Environment

- ◆ 10th largest world economy by GDP
- ◆ \$33 trillion natural resource wealth
- ◆ Strong GDP growth rate 2.9% (annualized pace)
- ◆ Fastest growing economy in G7
- ◆ 6% unemployment (U.S.A. 3.9%)
- ◆ Highest proportion with university degree
- ◆ Consumer confidence remains high



Canada's Economic / Political Environment - Concerns

- ◆ NAFTA risk & potential impact
- ◆ GDP growth expected to level off
- ◆ Interest rates have increased
- ◆ Economy needs some diversification
- ◆ Canadian Dollar US \$0.77 down from US \$0.81 one year ago
- ◆ Liberal Party of Canada in power – Justin Trudeau
- ◆ Stable 55% approval rating
- ◆ Next election – October 2019





CANADA MARKET TRENDS



Market Trends

- ◆ Canadians travel internationally
- ◆ 13.2 million overseas leisure trips, YOY increase of 6.5%
- ◆ Canadians spend + \$35 billion annually on travel outside Canada
- ◆ 7.8 million leisure trips to USA January – June
YOY increase + 5.5%
- ◆ Canadians confident, willing to spend on travel
- ◆ Quebec is a growth market



Market Trends

- ◆ Ultra Low Cost Carriers (ULCC) gaining momentum
- ◆ Fuel costs increasing, forcing fares up
- ◆ Booking windows diminishing
- ◆ **Air Canada switched Hawai'i flights from LCC, appealing to MCI & High Value Travelers**
- ◆ Air Canada Hawai'i Seats 2017 - 172,275
 - (increasing in 2018)
- ◆ WestJet Hawai'i Seats 2017 – 285,614



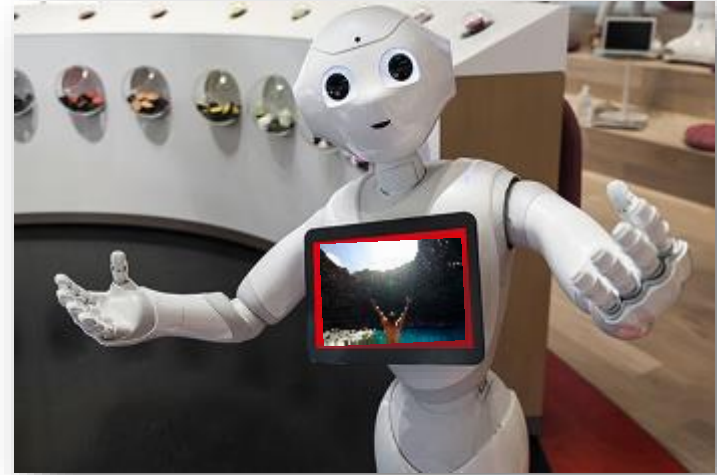
Market Trends

- ◆ Multigenerational Travel continues to be strong
- ◆ Chill Destinations! Iceland, Lapland, Greenland, Antarctica, Northern Canada
- ◆ Shared economy travel continues to grow
- ◆ Travel agency value resurgence
- ◆ Voluntourism



Market Trends

- ◆ Bleisure continues (mainly 18-34 yr olds)
- ◆ Reduced impact (responsible) travel awareness
- ◆ Mobile and mid-trip bookings continue to increase
- ◆ Frequency of social posting while traveling
- ◆ Increased Artificial Intelligence (AI) to enhance travel experience at all stages





2019 STRATEGIC OBJECTIVES

2019 Strategic Objectives

- ◆ Increase visitor spend, trip duration & multi-island / neighbor island visits
- ◆ Increase focus on high-spending travelers
- ◆ Elevate individual island brands
- ◆ Stay aligned with HTA mandate of responsible growth



2019 Strategic Objectives

- ◆ Encourage shoulder season travel
- ◆ Increase travel trade's destination knowledge (HDSP)
- ◆ Continue high impact PR to consumers and trade
- ◆ Enhance Social & Digital strategy for greater consumer engagement



2019 Strategic Objectives

- ◆ Encourage Canadians to visit Hawai‘i responsibly
 - Educate trade & consumers on unique attributes and sensitivities
- ◆ Reinforce & support Hawai‘i’s cultural identity
 - Active promotion of Signature Events, CEP/SIGI and Kūkulu Ola projects





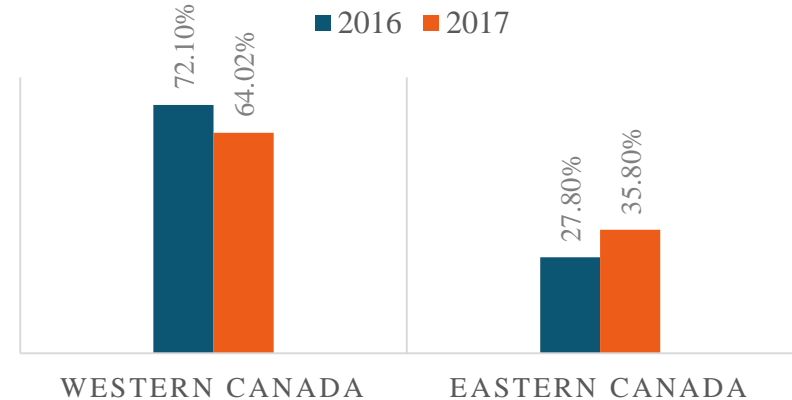
2019 TARGET SEGMENTS



2019 Target Segments

- ◆ Affluent High Value (Spending) Travelers (HVTs)
- ◆ Snowbird / Retirees (ZOOMERS)
- ◆ History & Culture Buffs
- ◆ Nature / Adventure / Outdoor Experience Seekers
- ◆ Romance Segment

GEO-TARGETING



Visits from Eastern Canada increasing, but B.C. & Alberta still 57%*

* Statistic Canada 2017 Data



2019 KEY PROGRAMS



2019 Key Leisure Programs

Television

- ◆ Targeted Specialty Channels plus Hawai'i Five-O, new Magnum P.I.
- ◆ TV Gross Impressions KPI: 22M



Co-operative Marketing Campaigns with key partners

- ◆ Targeted to high-intent travelers aligned with booking offers
- ◆ Travel Trade Shows KPI: 15
- ◆ Radio Impressions KPI: 2M
- ◆ Digital Gross Impressions KPI: 10M
- ◆ Travel Trade Print Circulation KPI: 250K

2019 Key Leisure Programs

Snowbird / Retiree Conversion Program

- ◆ Convert from competing destinations
- ◆ Digital Engagements KPI: 2.4M
- ◆ Consumer Show KPI: 2



Romance / Wedding Initiatives

- ◆ Position Hawai'i as attainable
- ◆ Digital Engagements KPI: 2.4M
- ◆ Print Circulation KPI: 200K
- ◆ Consumer Show KPI: 3



2019 Key Leisure Programs

Expedia.ca

- ◆ Tactical, timely, targeting High Spending Travelers
- ◆ Digital Engagements KPI: 3.6M
- ◆ Campaign PAX increase 15% YOY



President's Choice / MasterCard Loyalty Program

- ◆ Precision targeting of High Spending Travelers
- ◆ Digital Engagements KPI: 3M
- ◆ Incremental YOY Hawai'i Bookings: +50%



2019 Key Leisure Programs

HDSP Promotions / Incentives with Travel Trade partners

- ◆ Increase Agent destination knowledge
- ◆ HDSP Program completed KPI: 240



AMA Pin & Win – (Alberta's AAA)

- ◆ Extensive promotion with Grand Prize trips to Hawai'i
- ◆ Sales Increase KPI: 26% YOY
- ◆ Print Impressions KPI: 700K
- ◆ Digital Engagement KPI: 1M
- ◆ Social Impressions KPI: 10M





2019 KEY MCI PROGRAMS



2019 Key MCI Programs

Experience Aloha Business Exchange

- ◆ MCI decision makers to experience Hawai‘i
- ◆ Target Attendee KPI: 8
- ◆ RFPs Generated KPI: 3
- ◆ New Meeting KPI: 2



MCI Sales Mission Events

- ◆ Inform, Educate, Update in major markets
- ◆ Target Attendee KPI: 20
- ◆ RPPs Generated KPI: 5
- ◆ New Meeting KPI: 2



Questions?

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