



SPRING TOURISM UPDATE

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OVERVIEW- MARKET CONDITIONS

- GDP growth expectations of healthy 2% for 2019
- Unemployment is at historic lows (5.8%)
- Consumer confidence has dipped since 2017-2018
- Exchange rate fluctuations (\$0.08 range over 12 months, currently hovering around \$0.75 CAD)
- Political landscape stable, election in or before October 2019

COMPETITION AND BRANDING

- Competitors vary by region & purpose of travel
- Winter escape competitors include Mexico & Caribbean, Florida, Arizona, South Pacific, Costa Rica, Australia, cruises & all-inclusive
- Hawai'i benefits from promotion alongside other sun destinations to generate travel consideration, but...
- HTCAN positions unique culture and other attributes to differentiate and appeal to high-value travelers

COMPETITION AND BRANDING

- On and offline advertising and social media reach high-value travelers, position Hawai'i alongside upscale competitive set
- Virtuoso relationship
- Careful selection of PR media outlets
- Increasing buzz / gaining share – S & C America, Europe, Asia, Africa
- Newly accessible, unique bucket list, hotel growth, affordable, less developed, flight duration, increased airlift

AIRLIFT

- Increased capacity - Air Canada (+7.8%) & WestJet (+4.2%) offered 489,000 direct seats to Hawaii in 2018 (YOY +5.6%)
- Average load factor of 81.2%, down 2% vs. 2017
- Winter 2018/19 direct capacity + 44,000 seats or 12.5%
- Indirect arrivals (via U.S.) forecast - 18.4% for Nov to Apr
- Fuel costs up, but flight costs have decreased slightly YOY
- **Air Canada Breaking News!**

RESPONSIBLE TOURISM

- Responsible / sustainable theme reinforced in all journalist activities
- Incorporating themes into training, materials, events, trade FAMs, travel trade media editorial, etc.
- Only collaborate with partners who respect the objectives, appeal to the desired visitor set



SHORT-TERM OPPORTUNITIES

- HTCAN biggest media (TV) campaigns in Q1
- Air Canada Vacations and WestJet Vacations have identified softer future bookings into Q2, attributed primarily to Kīlauea and storms
- Working with air and tour operators to support campaigns
- Discounts and incentives implemented by partners

SHORT-TERM OPPORTUNITIES

- Key Q2 partner trade shows that allow Travel Agent engagement
- Social media inspiration through compelling content activity on Facebook, Instagram, Twitter

Aloha Canada 2019

- Inspire and educate Travel Agents
- Elevate participating Hawai'i partners
- Toronto, Calgary, Vancouver – Oct 21-23



SHORT-TERM OPPORTUNITIES

Air Canada Race 2019 – (tentative)

- Travel Agent FAM/Race/Event intended for O'ahu for Nov 2019 – 9th Edition
- Experience driven/interactive, Travel Agents aspire to participate – ultimately creating brand advocates
- Extensive coverage in Travel Trade publications / social media, elevating impact



HAWAI'I ISLAND

- Current EnRoute Air Canada in-flight magazine features island of Hawai'i on front cover, 9 page article
- Details the post Kīlauea eruption experience in a very compelling way
- Result of a FAM orchestrated by HTCAN and Island of Hawai'i Visitors Bureau





MCI OVERVIEW

HCC Opportunities

- Direct targeting and engagement with planners who organise events of a scale suitable for HCC
- Utilisation and distribution of HCC materials that specifically counter preconceptions
- Datamine Simpleview follow-up opportunities or potential leads from past U.S. or Canadian business

MCI OVERVIEW

Upcoming Groups

- Sporting event – Approx. 3,000 global attendees
 - O'ahu 2020 or 2021, Convention Center, sporting venues
- Electronics Conference – Approx. 300 attendees, 1,400 nights
 - Maui October 2019, property TBD
- Frequent contact with decision makers and contacts to close
- HTCAN needs – recommendations as required, detailed up-to-date online resources for planners

MAHALO
THANK YOU
MERCI

