

BRANDING STANDING COMMITTEE

2025 CANADA – BRAND & MARKETING STRATEGY
MAY 16, 2024



ECONOMIC CONDITIONS



CANADIAN ECONOMIC CONDITIONS

The Glass is Half Empty

- CAD \$0.73 USD (\$0.75 in Jan.)
- High Inflation (food, fuel, housing)
- High Interest Rates
- Unemployment rising slightly to 6.2%, despite job availability increases
- Consumer confidence was low but maintaining, but recently dropped again





CANADIAN ECONOMIC CONDITIONS

The Glass is Half Full

- o Avoided a recession
- o Interest rate holding at 5.0% - predicted to drop in June... maybe
- o Acceptance of a new normal – pent up travel demand





THE IMPACT ON TRAVEL

Canadians are *still* traveling

- US Trips by air up 20% vs 2019
- Non-US trips are now 96% of pre-pandemic volume
- Recent AMEX study identified Canadians as second highest for trip spend, but spend in Hawai'i down 7.2% YOY
- Maintaining an average Hawai'i length of stay of 11.88 days



Gros Morne Park - Newfoundland

TRAVELER & TRADE COMMENTARY



CANADIAN TRAVELER HAWAI'I BOOKING SENTIMENT

What we're hearing

- Fire related hesitancy / uncertainty
- Hold off a year?
- Perceived resistance to visitors
- Mālama confusion and/or hesitancy
 - “Do we all have to volunteer?”
- Short Term Rental Questions – Popular with Canadians





CANADIAN TRAVEL PARTNER COMMENTARY

What's happening

- o Airlines are watching the booking volumes closely
- o WestJet has reduced Maui lift for the summer, but will increase for fall/winter

As expected

- o Preference for messaging that leads with the welcoming Aloha Spirit, natural beauty, uniqueness, culture, iconic experiences, etc.



MOVING FORWARD



TARGET AUDIENCE

- o Experience Seekers
- o Affluent Travelers
- o Snowbirds/Retirees
- o Romance

Mindful Travelers

High spending traveler

High value traveler

Lifetime value traveler



Avid Traveler
 Age range 35-49; Income range \$100k+
 Took an international trip in the last 12 months

Older Avid Traveler
 Age range 50- 64; Income range \$100k+
 Took an international trip in the last 12 months

Long-Distance Traveler
 Age range 35-64; Income range \$100k+
 Took an international vacation by air in the last 12 months

Senior Traveler
 Age range 64+; Income range \$100k+
 Been to Hawai'i



MINDFUL TRAVELERS & MĀLAMA PHASE 2

- Mālama as a supporting message
- Mindful, Responsible, Regenerative messaging incorporated, but not the lead
- Positive welcoming themes
- Maui updates to travel trade as necessary and required – wary of reminders



MARKETING STRATEGY



BRAND MARKETING PLAN 2025

Under Construction

Preliminary Overall Themes

- o Welcoming Aloha Spirit
- o Mindful Travel
- o Unique Hawai'i – Culture & Experiences

Targeted Compelling Iconic Visuals





BRAND MARKETING PLAN 2025

- PR – Renewed focus on the right stories utilising the right platforms
- Frequent trade partner engagement
 - Close monitoring of airlines and tour operators to defend against lift reduction
- Agent Focus?
 - Bookings: Korea 49%, US 44%, Japan 36%, Canada 34%
- Reinforces importance of Air Canada and WestJet





BRAND MARKETING PLAN 2025

- o Strategic FAMs to inspire product build
- o Consumer media that targets desired audience while reinforcing welcoming themes
- o Strategic Organic & Paid Social reinforcing key themes and supporting buy local, festivals & events, agritourism, voluntourism





MAHALO!
THANK YOU!
MERCICI !

HAWAII TOURISM
CANADA