



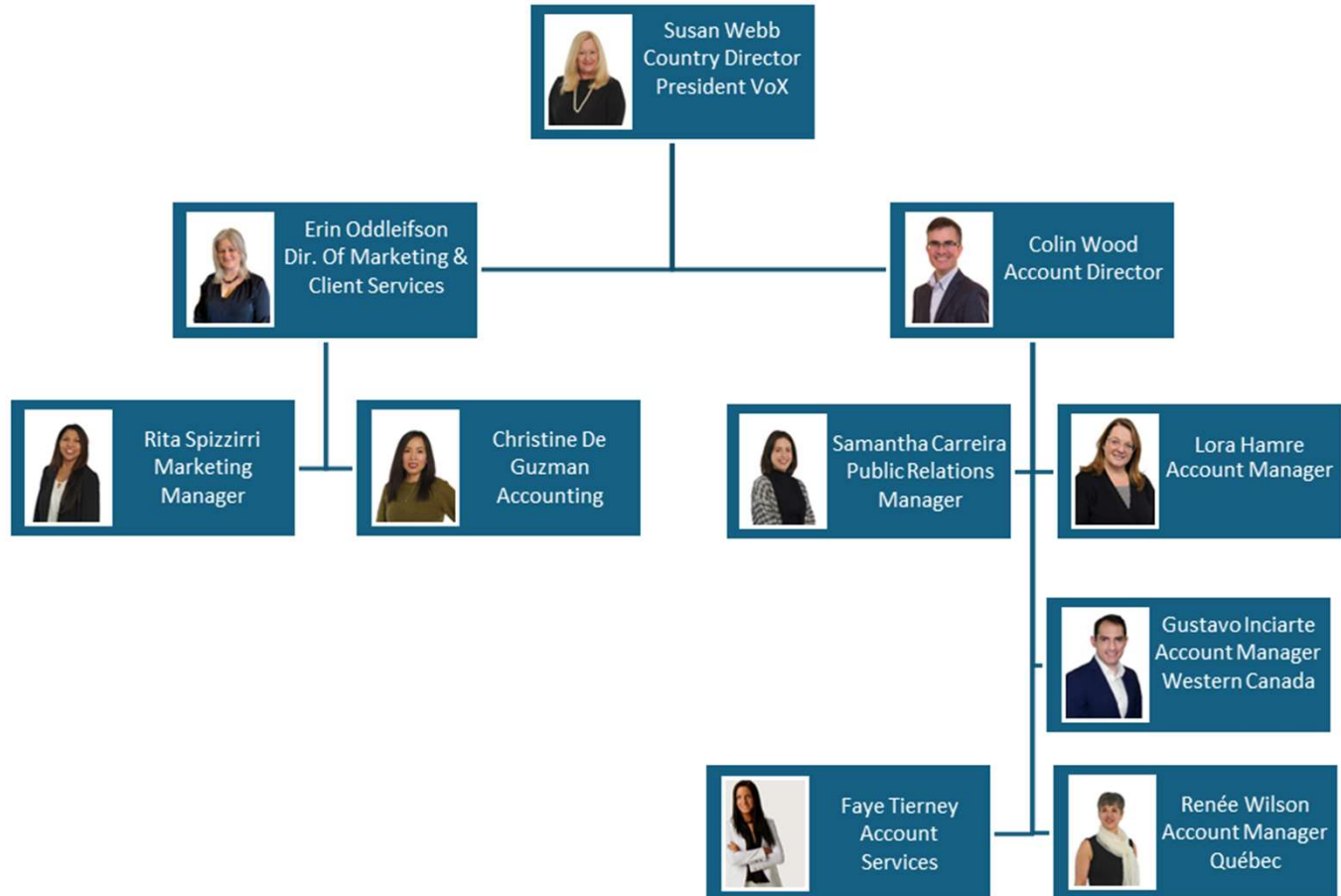
2025 Brand Marketing Plan



Susan Webb – President
Colin Wood – Account Director



HAWAI'I TOURISM CANADA TEAM





MARKET SITUATION

HAWAII TOURISM
CANADA



CANADIAN MARKET SNAPSHOT

- Consumer confidence slowly improving
- Unemployment rate 6.6% (highest in seven years)
- Interest rates fallen to 4.25% and predicted to drop further
- CAD \$0.74 USD still a concern (\$0.77 two years ago)

That said...





COMPETITIVE ENVIRONMENT

Canadians are really traveling!

- First half of 2024 up 11% YOY (16.8M)
- Now 97% of 2019 outbound travel
- Europe & UK up 10% YOY
- Asia & Oceania up 30% but still only 83% of 2019 visits
- Caribbean, Mexico, Central America up 9% YOY and 2% increase over 2019



*Conference Board of Canada August 2024
Outbound Report Data



KEY CANADIAN STATS

January to July 2024

- Second largest international market: 261k visitors
- Length of stay: 11.23 days
- Visitor Expenditure: \$645M
- Per Person Per Trip: \$2,470
- First Time: 34.6%
- Leisure: 91%



*HTA July 2024 Data



January to July 2024

- By Island
 - O'ahu 146k
 - Maui County 97k
 - Island of Hawai'i 46k
 - Kaua'i 28k
- Average Age: 48
- Average Party Size: 2.3

*HTA July Data

KEY CANADIAN STATS





TODAY'S CANADIAN TRAVELER

About Us

- 67% with passport vs 46% of Americans
- Second highest global market for anticipated average leisure travel spending annually*
- Longer trips than the global average but...

Looking for value and travel hacks to save money.



*AMEX 2024 Global Study



TODAY'S CANADIAN TRAVELER

- Prioritizing spontaneous, bucket list, and once in a lifetime vacations
- Trend back towards travel agents for multi-element travel
- Solo travel, self-fulfillment, and sustainable travel segments are trending



AIR OVERVIEW - SEATS

Route	Frequency	Season
YVR-HNL	1 / day	Year-round
	2 / day	Oct 27 – Apr 30
YYZ-HNL	2 / week	Dec 6 – Mar 28
YVR-KOA	3 -4 / week	Oct 27 – Apr 30
YVR-OGG	1 / day	Oct 27 – Mar 29



AIR CANADA

An overall reduced schedule from 2023.
Toronto to Maui 1/wk cancelled.

Route	Frequency	Season
YVR-HNL	11-12 / week	Nov – April
YYC-HNL	3-4 / week	Nov – April
YEG-HNL	1 / week	Nov – April
YVR-KOA	2-4 / week	Oct – April
YYC-KOA	2-3 / week	Oct – April
YVR-LIH	2-4 / week	Oct – April
YVR-OGG	1-2 / day	Oct – April
YYC-OGG	3-4 / week	Oct – April
YEG-OGG	1-2 / week	Nov – April



For full winter season, WestJet has increased average capacity to O'ahu by 4%, Kaula'i by 27%, and I of Hawaii'i by 9% YOY, while Maui has decreased by 23%.



REMAINDER OF 2024 – LARGER INITIATIVES

Travel Trade FAMs

- Air Canada Vacations - O'ahu & Maui

Consumer Direct Media

- National Digital & Social executions

Travel Trade Shows

- Air Canada Vacations & Maritime Travel

Aloha Canada

- Vancouver, Toronto, Calgary - Oct 21-24
- Media Events Vancouver & Toronto
- 16 partners attending



2025 TARGET AUDIENCE

TARGET AUDIENCE

- Experience Seekers
- Affluent Travelers
- Snowbird/Retirees
- 70% of visits come from British Columbia & Alberta, but Ontario over indexes with 36% of the desired audience

Mindful Travelers

High spending traveler

High value traveler

Lifetime value traveler



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

Age range 50- 64; Income range \$150k+
Took an international trip in the last 12 months

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

Age range 64+; Income range \$100k+
Most recent visited destination Hawai'i



STRATEGY & TACTICS

HAWAII TOURISM
CANADA



CONSUMER DIRECT STRATEGY

Reinforce Hawai'i as...

- Warm, welcoming, beautiful, relaxing
- Incredible and unique experiences

Incorporating...

- Mālama, Kuleana & Ho'okipa messaging

And utilizing...

- People, Place, Culture resources, with an emphasis on video
- More direct CTA inclusions to increase targeted audience bookings





CONSUMER DIRECT TACTICS

Social Media

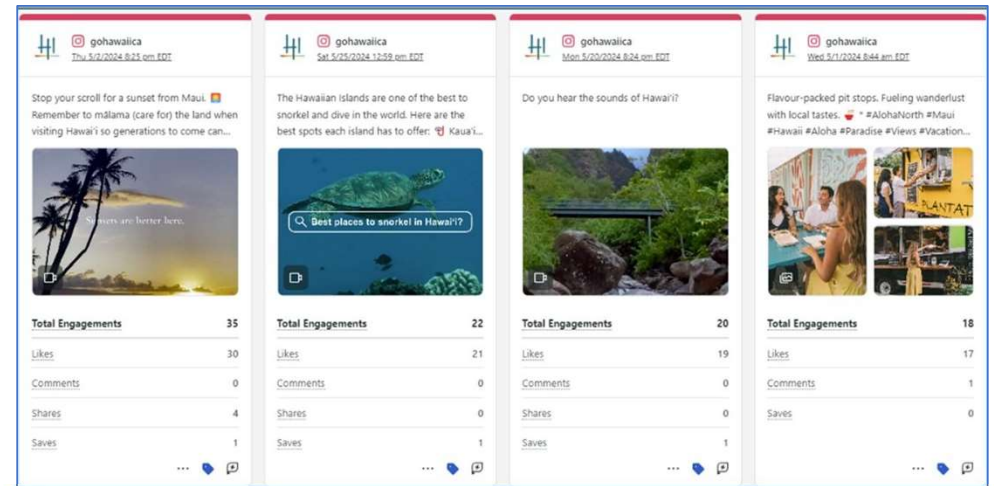
- Canadian channels
- Organic and paid media

Digital Campaigns

- Online Video
- Connected TV
- Display Advertising

Out Of Home

- Public Transit Activations
- Digital Billboards





NEW in 2025

- o Greater inclusion of airline booking partners as a CTA option in consumer direct campaigns, promotions, and assets, driving lower into the booking funnel



AIR CANADA

CONSUMER DIRECT TACTICS

Maui moments await.

Non-stop flights from Vancouver.

The HAWAIIAN ISLANDS

WESTJET

Photo credit: Hawaii Tourism Authority (HTA) / Tor Johnson





PUBLIC RELATIONS

2025 Planned Activities

- Group Media FAM - Fall 2025
- Year-Round Individual Media Visits
- Press releases, media monitoring & ongoing pitching
- Discover America Canada Day 2025
- Aloha Canada Media Interviews & Reception
- More Broadcast Television Segments





TRAVEL TRADE ACTIVITY

1. Communications

Utilize key travel trade media platforms to educate, inform, update Advisors and product decision makers

Travelblast

HAWAII
Hawaiian Paradise

LEARN HOW TO WIN!
Become a Hawaii's Destination Expert for your chance to WIN!

The Hawaii's Destination Specialist Training is simple, informative, and fast!

The program is available in both print and online formats. You can choose the format that works best for you. The program is available in both print and online formats. You can choose the format that works best for you.

Complete the Hawaii's Destination Specialist Program and you will be eligible to win a \$500 cash prize or a \$500 travel voucher.

1st prize \$500 | 2nd prize \$250 | 3rd prize \$100

Click for more details

Prize subject to availability. Winner must be 18 years of age or older. Winner must be a resident of the United States. Winner must be a resident of the United States. Winner must be a resident of the United States.



Travelblast

MAUI
One of the Hawaiian Islands

Maui Moments Await

Our communities are still healing from the disaster we have experienced. Respectfully visiting Maui right now means following all of the rules and regulations. Respectful travel during this time can include the following: participating in a volunteer experience to give back to the affected communities, donating time/money/resources to those affected, supporting and buying local while on Maui, and more. Maui's and we look forward to seeing you soon!



2. Education / Training

Combination of webinars, in-person activities, and releasing bite-sized content.

- Destination Specialist Program
- Aloha Canada 2025
- Trade FAMs
- Partner Shows / Launches



TRAVEL TRADE ACTIVITY





3. Partnerships

HTCAN's partners are crucial to booking results and traveler education

- Co-operative campaigns offering access to high probability strategically targeted travelers



TRAVEL TRADE ACTIVITY





TRAVEL TRADE ACTIVITY

NEW Trade Partner Campaigns for 2025

- Costco Travel
 - Air Miles (Loyalty Program)
 - Flight Centre
-
- Co-operative 1:3 Value
 - Required Traveler Education elements within all 3 campaigns





PARTNERSHIP OPPORTUNITIES

HAWAII TOURISM
CANADA



PARTNERSHIP OPPORTUNITIES

- Agent Focused Trade Shows
- Aloha Canada 2025
- Agent Focused FAMs
- Webinar Support
- Individual Press Trip Support
- Group Media FAM Support
- **New!** Social Media Posting Program

Please contact HTCAN for details.



A photograph of three women in traditional Hawaiian attire performing a ceremony on a beach at sunset. They are wearing white, ruffled, patterned skirts and green leaf crowns. The woman in the foreground is holding a small object in her hand. The background shows the ocean, a sandy beach, and a cloudy sky with a bright sun setting. The text 'MAHALO! THANK YOU MERCI' is overlaid on the right side of the image.

**MAHALO!
THANK YOU
MERCİ**