

2025 SPRING TOURISM UPDATE



HAWAII TOURISM
CANADA



HTCAN TEAM



Susan Webb

Country Director,
President VoX



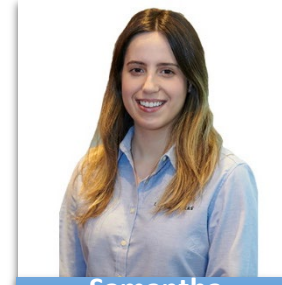
Colin Wood

Account Director



Erin Oddleifson

Director of
Marketing
& Client Services



**Samantha
Carreira**

Public Relations
Account Manager



Rita Spizzirri

Marketing
Production
Manager



**Christine De
Guzman**

Accounting
Manager



Lora Hamre

Account Manager,
Eastern Canada



Gustavo Inciarte

Account Manager,
Western Canada



2024 MMA Stats

Canada MMA	2022	2023	2024	% Change vs 2023
Visitor Expenditures (\$Millions)	962	1,230	1,051	- 14.6%
Visitor Days	5,069,619	5,585,244	4,708,524	- 15.7%
Arrivals	414,250	474,727	433,049	- 8.8%
P.P. Per Day Spend (\$)	189.8	220.30	223.20	+1.4%
P.P. Per Trip Spend (\$)	2,322.40	2,591.60	2,427.40	- 6.3%
Length of Stay (Days)	12.24	11.77	10.87	- 7.6%



2024 CANADIAN VISIT & SEAT STATS

Island	2023	2024	% Change
O'ahu	244,328	243,103	-0.5%
Maui County	216,895	160,489	-26%
Island of Hawai'i	88,214	74,749	-15.3%
Kaua'i	56,412	44,568	-21%

Scheduled Seats	2023	2024	% Change
Canada Total	466,196	420,129	-9.9%

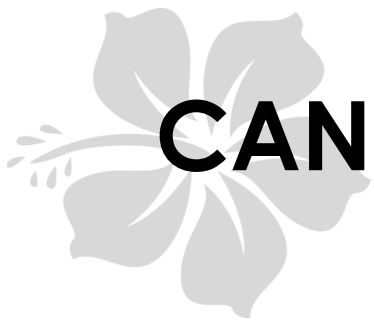
MARKET INSIGHTS

HAWAII TOURISM
CANADA



CANADIAN MARKET INSIGHTS

So how are things in Canada?

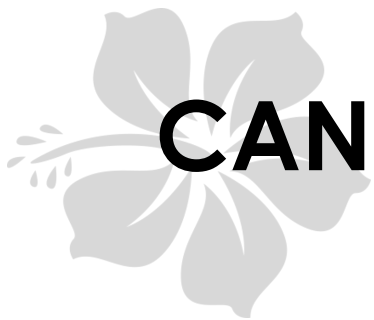


CANADIAN MARKET INSIGHTS

Just tarrific!

Thanks for asking.





CANADIAN MARKET INSIGHTS

Challenging Times

- Big day. Tariffs implemented at 25% on all goods, 10% on energy
- Start of a trade war, as Canada has responded
- Risk of recession
- Low exchange rate
- Feared layoffs
- Canadian political transition (federal election coming)
- Threats to sovereignty (Posturing?)



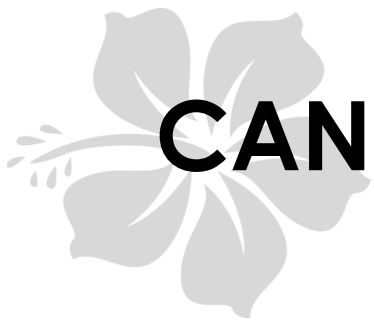


CANADIAN MARKET INSIGHTS

What it means

- Canadians are on-edge about our relationship with the U.S.
- “Buy Canadian” messaging is everywhere
- Canadian patriotism at an all time high
- Political leaders suggesting that Canadians forgo U.S. travel



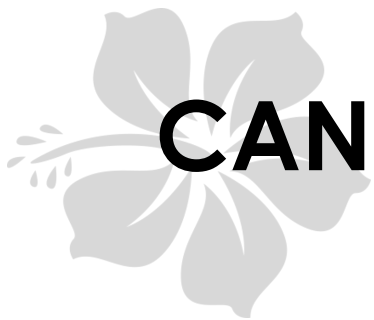


CANADIAN MARKET INSIGHTS

Impact on U.S. visits by Canadians

- Too soon to say
- Short blip or longer-term challenge?
- Virtual signaling? Canadian visits during President Trump's first term went up by 2M despite a highly anticipated downturn
- Some states may see greater impact
- Exchange rate is key





CANADIAN MARKET INSIGHTS

- Consumer confidence low, but stable
- Unemployment steady at 6.6%, projected to increase
- Interest rates dropped to 3%, but likely stalled
- One CAD = \$0.69 USD (25-year low)
- Now 100% of 2019 outbound travel
- Significant recent surge in search activity for Europe, Mexico & Caribbean





CANADIAN MARKET INSIGHTS

Key Airline / Tour Operator Comments

- Seeing U.S. slowdown and cancellations, but too soon to predict duration
- Tweaking U.S. capacity, but optimistic about Hawai'i
- View the exchange rate and economy as the more significant concerns
- Expect that enticing value-driven offers will influence bookings
- In their opinion, leaning on Hawai'i's iconic appeal in marketing and advertising will help while emphasizing uniqueness
- Marketing should not pause for long





CANADIAN MARKET INSIGHTS

Competitive Environment

- Canadians are traveling!
- 62% planning a leisure trip (Nov 24 – April 25)
- YOY traveler increase of 9.1% (Jan – Nov)

Overnight Trips by Market

- Caribbean, Mexico, Central America up **7.2%** YOY
- USA: overall down **-2%** (+5.6% auto / -8.6% non-auto vs. 2023)
- Europe & UK up **10.1%**
- Asia & Oceania up **30.4%**



*Conference Board of Canada January 2025 Outbound Report Data



COMPETITIVE LANDSCAPE

Top U.S. Destinations	Volume	YOY Change
Los Angeles	1.1M	+2.8%
San Francisco	911K	+5.3%
Las Vegas	850K	-1.7%
Orlando	790K	+22.9%
Fort Lauderdale	719K	+36.4%

Top Caribbean, Mexico, Latin America Destinations	Volume	YOY Change
Mexico	2.1M	+11.1%
Dominican Republic	1M	+10.3%
Cuba	780K	-5.2%
Jamaica	353K	+7.6%
Costa Rica	235K	+5.6%

Top Asia & South Pacific Destinations	Volume	YOY Change
Japan	531K	+36.4%
India	399K	+20.2%
China	250K	+675.3%
South Korea	222K	+26.9%
Thailand	221K	+18.5%

Top U.K. & Europe Destinations	Volume	YOY Change
France	1.1M	+2.8%
Italy	1.05M	+5.3%
U.K.	957K	-1.7%
Portugal	673K	+22.9%
Spain	621K	+36.4%

*Conference Board of Canada January 2025 Outbound Report - 2024 Data





CANADIAN MARKET - IN SUMMARY

- Challenging times
- Too soon to predict impact or duration
 - Canadians love Hawai'i and travel very extensively
 - Hawai'i enjoys a separation from the mainland, both physical and psychological
 - Hawai'i's culture, history and Polynesian heritage offer unique experiences that resonate with Canadians
 - Canadian winters are still painfully cold
 - Canadians will keep coming



TARGET AUDIENCE & TRIP MOTIVATORS



TARGET AUDIENCE

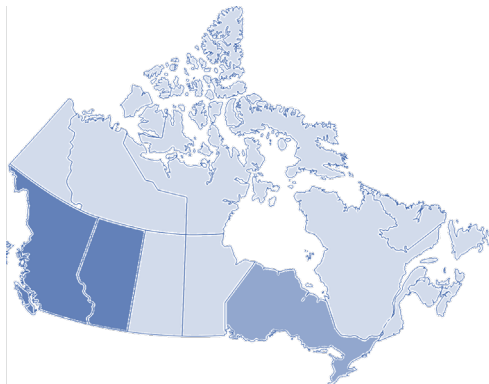
- Experience Seekers
- Affluent Travelers
- Snowbird/Retirees
- Romance

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
International vacation by air in the last 12 months

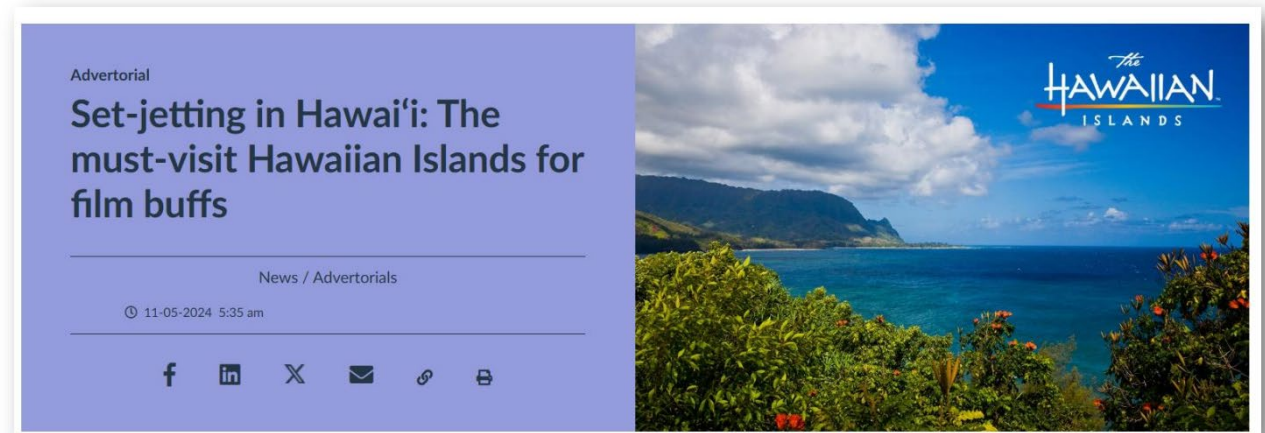
Age range 64+; Income range \$100k+
Most recent visited destination Hawai'i



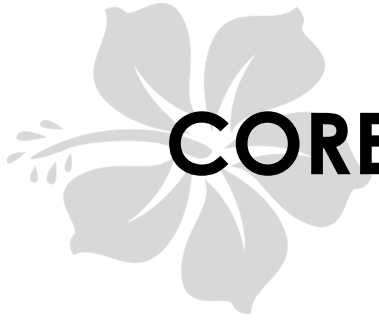
TRIP MOTIVATORS

- Favorable weather 47%
- Good value 34%
- Vacation experience 33%
- Spending time with family/friends 33%
- Feeling safe 25%

Expenses / cost of travel / exchange rate remains the top barrier to outbound travel



BRAND MESSAGE



CORE BRANDING MESSAGE

- Warm, beautiful, unique, iconic, welcoming Hawai'i looks forward to your visit
- Supported with Mālama opportunities
- Inclusion of responsible, mindful travel messaging



MOVING FORWARD

HAWAII TOURISM
CANADA



ADDRESSING CHALLENGES

- Keep moving forward, but monitoring traveler sentiment closely for any necessary pivots and timing adjustments
- Emphasize the unique, and lean-in on messaging that reinforces Hawai'i's welcoming attributes
- Trade and Media Group FAMs will continue to include neighbor islands to spread visitation
- Keep Travel Advisors inspired
- Promote Canada/Hawai'i stories that reinforce the deep connection



RECENT ACCOMPLISHMENTS



RECENT ACCOMPLISHMENTS

2024 Final Results – Metric Highlights

Consumer Digital Impressions

- 25.5M – 155% over target

Trade Impressions

- 593K – 10% over target

Public Relations Calls

- 160 – 33% over target

PR Articles Generated

- 62 – 463% over target

Trade Contacts

- 164 – 173% over target





RECENT ACCOMPLISHMENTS Q1 2025

PUBLIC RELATIONS

Individual Media Visits

- Jim Byers (OpenJaw, Bold and Travel Life) – Jan 2025
- Grant Fraser (Flagstick Magazine and Golf the World) – Jan 2025
- Rick and Chris Millikan (INSPIRED 55+ Magazine) – Jan 2025
- Lisa Naccarato (CBC News) – Feb 2025
- Maddie Clerides (VITA Magazine) – Feb 2025



Travel USA / Travel

Hawaii awaits: Why a visit to magical Maui is healing in more ways than one

The island, with its sandy beaches, dormant volcanoes and rich culture, is welcoming travellers back with a heartfelt aloha

Linda Barnard

Published Nov 08, 2024 • Last updated Nov 20, 2024 • 6 minute read

Join the conversation



Hotels line the golden-sand stretch of Ka'anapali Beach, Maui. PHOTO COURTESY OF HAWAII TOURISM AUTHORITY



RECENT ACCOMPLISHMENTS Q1 2025

PUBLIC RELATIONS

- Articles promoting Cirque du Soleil's Auana and Bishop Museum in Le Journal de Montreal and Journal de Quebec



The screenshot shows a news article on the website 'le journal de montreal'. The article title is 'Hawaï : 'Auana, le tout nouveau spectacle du Cirque du Soleil'. The main image shows performers on stage in front of a large sun-like backdrop. The article is by Marie-Ève Blanchard, dated January 23, 2025. The text describes the premiere of the 'Auana' show at the Bishop Museum in Honolulu, Hawaii, highlighting its cultural significance and the collaboration with local experts. A sidebar on the right features 'LES PLUS POPULAIRES' (Most Popular) articles and a 'Fortait Internet' advertisement.



RECENT ACCOMPLISHMENTS Q1 2025

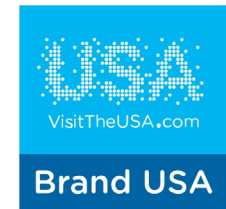
PUBLIC RELATIONS

On-Air Segments

- Jody Robbins on Global Calgary – Jan 2025
- Jaime Damak on Global Montreal – Jan 2025

CONSUMER DIRECT – Co-op

- HTA Expedia / Brand USA Campaign
- Nov 27, 2024 – Mar 31, 2025
- Preliminary results are favorably driving search growth and bookings



UPCOMING ACTIVITIES



ACTIVITY MIX

HTCAN continues to utilize a mix of tactics to influence Canadian travelers and to generate targeted bookings.

- Public Relations
- Consumer Direct Advertising
- Cooperative Partner Campaigns
- Travel Trade





PUBLIC RELATIONS

- Group Media FAM – Sept Maui & island of Hawai'i – Romantic Travel
- Year-round Individual Media Visits
- Newsletters & ongoing pitching
- Aloha Canada media receptions
- Discover America Media Day: October 28
- Year-round broadcast segments
- Participation in industry events throughout the year



Blissful Maui and O'ahu: My Hawaiian Adventure
Article and photography by Michael Morcos

Returning to Maui felt like reconnecting with an old friend. Even though I had visited years ago, the island's warm aloha spirit welcomed me back as if no time had passed. This trip, however, came with an added treat—a visit to O'ahu, completing my Hawaiian experience in a way I had always dreamed of.

The Westin Maui Resort & Ka'anapali Tower
When I arrived at the Westin Maui Resort, a sense of nostalgia hit me. A decade ago, I had stayed at this very property. Yet, as familiar as it felt, it was clear the resort had undergone significant transformations. Its Hukapu tower, a newly renovated luxury wing, stood as a testament to its growth. From the moment I stepped into the exclusive Lanai, where cultural experiences and wellness activities awaited, I

knew this was going to be an elevated stay.

Every morning, I sipped my coffee on my lanai, taking in the views of the Pacific Ocean against the lush volcanic mountains. The air felt lighter here, the colors more vibrant. The property's fine dining options made it nearly impossible to leave, but Ulu Kāhuna by Meritens quickly became my favorite. Over dinner, I savored the perfect blend of Hawaiian hospitality and flavors crafted with care, all while marveling at the stunning ocean views.

Artistic Discoveries and Dolphin Adventures
One of the highlights of my Maui journey was a guided tour of Small Town, Big Art in Waikapu. This initiative turned the town into an outdoor gallery, showcasing murals and sculptures that celebrated the island's history and

culture. Walking through the streets, I felt a deeper connection to Maui's roots, as each piece of art told a story of its past and present.

Another unforgettable experience was the dolphin watch sail with Tenaris Adventures. Boarding a sleek catamaran, I set off into the turquoise waters off Ka'anapali. Watching wild dolphins and turtles alongside our boat was magical—a reminder of the incredible natural beauty that surrounds these islands. Their playful energy was contagious, leaving me in awe of nature's wonders.

Giving Back with Kupu Olowalu
Volunteering with Kupu Olowalu gave me a sense of purpose during my trip. Nestled within a 75-acre reserve, I joined efforts to restore native plants and preserve Hawaiian traditions. It felt deeply rewarding to contribute to protecting this land that had given me so much joy.

The Hyatt Regency Maui
Later, I moved to the Hyatt Regency Maui Resort



www.westinmauiresort.com - Already 23 Years!



and Spa. Spread across 40 acres, it was a paradise of waterfalls, tropical gardens, and luxurious amenities. My evening was spent at Japengo, indulging in exquisite Japanese-inspired dishes that I simply couldn't get enough of.

Exploring Iao Valley State Park
As I set foot on the paved trail at Iao Valley State Park, I felt instantly immersed in its serene beauty. The gentle walk led me to a breathtaking viewpoint of Kukui'oukou, known as the Iao Needle. Rising dramatically 1,200 feet from the valley floor, this natural wonder stood tall against the lush green backdrop, a striking reminder of the island's volcanic origins. Along the way, I wandered through a small botanical garden, marveling at the plants once brought here by early Hawaiian settlers. Each step felt like a connection to the land's history, its beauty as captivating as its cultural significance.

Haleakala Sunset
But the most breathtaking moment came at Haleakala National Park. Standing at 10,023 feet above sea level, I watched the sun dip below the horizon. The sky transformed into an artist's palette of fiery oranges and soft purples, while the cooler seemed otherworldly. Legend says the demigod Maui slowed the sun here, and for a brief moment, time truly felt like it stood still.

O'ahu: A Blend of Culture and Relaxation
O'ahu was a new chapter in my Hawaiian adventure, starting with a visit to the Bishop Museum. I explored the rich cultural and natural history housed within its walls. Learning about the islands' origins through its artifacts gave me a profound appreciation for this land.

At Iolani Palace, I stepped into the royal world of Hawaii's last monarchs. The specialty tour offered unique insights into the lives of the palace staff, adding a personal touch to the grandeur of this historic landmark. Walking its halls felt like stepping back in time.

Beachside Bliss at Kaimama Beach Hotel
My stay at Kaimama Beach Hotel was the epitome of relaxation. Situated on the shores of Waikiki with Diamond Head as its backdrop, the hotel's charm was undeniable. Dinner at Hula Tapa, with its casual beachside menu, was the perfect way to wind down. The gentle sound of the waves and the warm breeze made every bite unforgettable.

Art, Chocolate, and Cultural Performances
The Honolulu Museum of Art (HMAA) was another highlight. Wandering through its galleries, I admired a collection that beautifully bridged Hawaii's history with global influences. Lunch at the museum's cafe was a delightful surprise—a perfect mix of flavors and creativity.

Later, I found myself at Lanahan Estate Chocolate, learning about the art of crafting chocolate from cocoa grown right on the island. Tasting their small batch creations was a sensory journey, each piece a tribute to Hawaii's land and people.

At the Polynesian Cultural Center, I was captivated by "HAKA: Breath of Life," a spectacular evening show featuring dance, music, and fire-knife performances. The story of Maui and Lanu, told through Polynesian traditions, was deeply moving. Earlier that day, I had also attended Hula, a cone show brimming with spirit and storytelling. These performances weren't just entertainment; they were celebrations of heritage and community.

Exploring Hale Iwa and Planting a Legacy
Hale Iwa, a charming surf town on O'ahu's North Shore, offered a blend of local style and history. Its boutiques, art galleries, and laid-back vibe made it a perfect spot to wander and soak in the island's character.

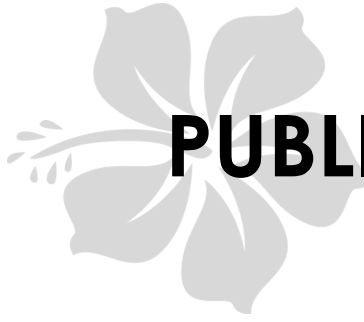
At Gunstock Ranch, I had the chance to leave a lasting mark on the island. Participating in their Planter's Experience, I planted a tree in their Legacy Forest. It was humbling to know this small act would contribute to reforestation efforts, leaving a positive impact on the land I had grown to love.

A Journey to Remember
As my trip came to an end, I reflected on the beauty and diversity of these islands. From the rejuvenating landscapes of Maui to the rich cultural tapestry of O'ahu, every moment felt like a gift. The sunsets, the food, the art, and the people made this journey unforgettable. Hawaii isn't just a destination—it's an experience that stays with you long after you leave. ■

www.gohawaii.com



World Traveler Winter 2024-25



PUBLIC RELATIONS

- Yes, there are Canadian High School surfers!
- Surf Canada collaborating with HTCAN to assemble a team, provide coaching
- Air Canada as potential flights partner
- Compelling and unique feel-good story that reinforces Hawai'i as surfing's home and a destination for young people to aspire to visit



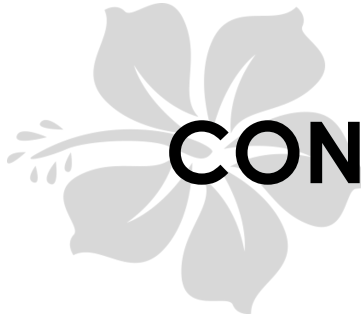
2025 HONUA FINALS
JULY 31 - AUGUST 3, 2025

Flags of participating countries: United Kingdom, Japan, New Zealand, Australia, United States, and California Republic.

HONUA FINALS
presented by Nike Swim


SWIM
The World Cup of Interscholastic Surfing
Ala Moana Bowls, Honolulu, Hawai'i USA

**HIGH SCHOOL TEAMS
WORLDWIDE ARE WELCOME
(APPLY @ HONUAFINALS.COM)**




CONSUMER DIRECT

- Social Media – year round
 - Canadian channels
 - Organic and paid media
- Digital Campaigns – Jan to April, Fall
 - Advanced TV
 - Connected TV
 - CTV retargeting
- OOH – Feb to Mar, Fall
 - Digital billboards
- Snowbird Advisor

 **Snowbird Advisor**
September 10, 2024 · 🌐

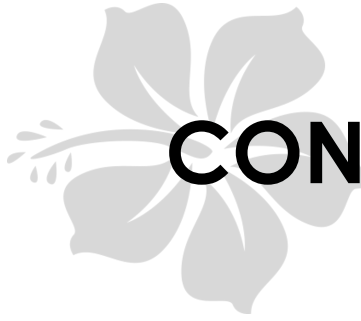
The Hawaiian Islands are a truly magical place with their own unique culture and traditions – attracting snowbirds for decades. They also enjoy some of the best weather on earth, virtually the same year-round with warm breezes, lots of sunshine, clear skies – oh, and rainbows! With all the talk these days about over-tourism and concern over the environment, the Hawai'i Tourism Authority is encouraging visitors to experience Hawai'i in a more respectful and responsible way - for the sake of the 'āina (land), its people, and wildlife. It also allows visitors to have a more enriching and...



SNOWBIRDADVISOR.CA

How snowbirds can Mālama Hawai'i by volunteering [Learn more](#)

Canadian snowbirds have been flocking to Hawai'i for decades. If you haven't...



CONSUMER DIRECT - COOPERATIVE

- Costco Travel – year round
- Flight Centre – Jan to June
- Air Miles – recently ended
- Air Canada / Air Canada Vacations – Fall
- WestJet / WestJet Vacations - Fall

AIR CANADA Powered by Expedia

Home Get Started Expedia Travel Picks

English FLIGHT DEALS

Origin
Toronto, ON (YYZ-Pearson Intl.)

< Back

Where paradise goes for inspiration

The Hawaiian Islands

If you've been, you'll know. Stunningly beautiful, warm and welcoming, with incredible experiences to be cherished. Mālama means caring for and protecting what is so special about Hawai'i. And we encourage it. Travel mindfully. Seek out the fascinating history. Savour the culture. Explore local. Thank us later.

Starting at **886 \$ CA**

FLIGHT DEALS HOTEL DEALS PACKAGE DEALS

The HAWAIIAN ISLANDS

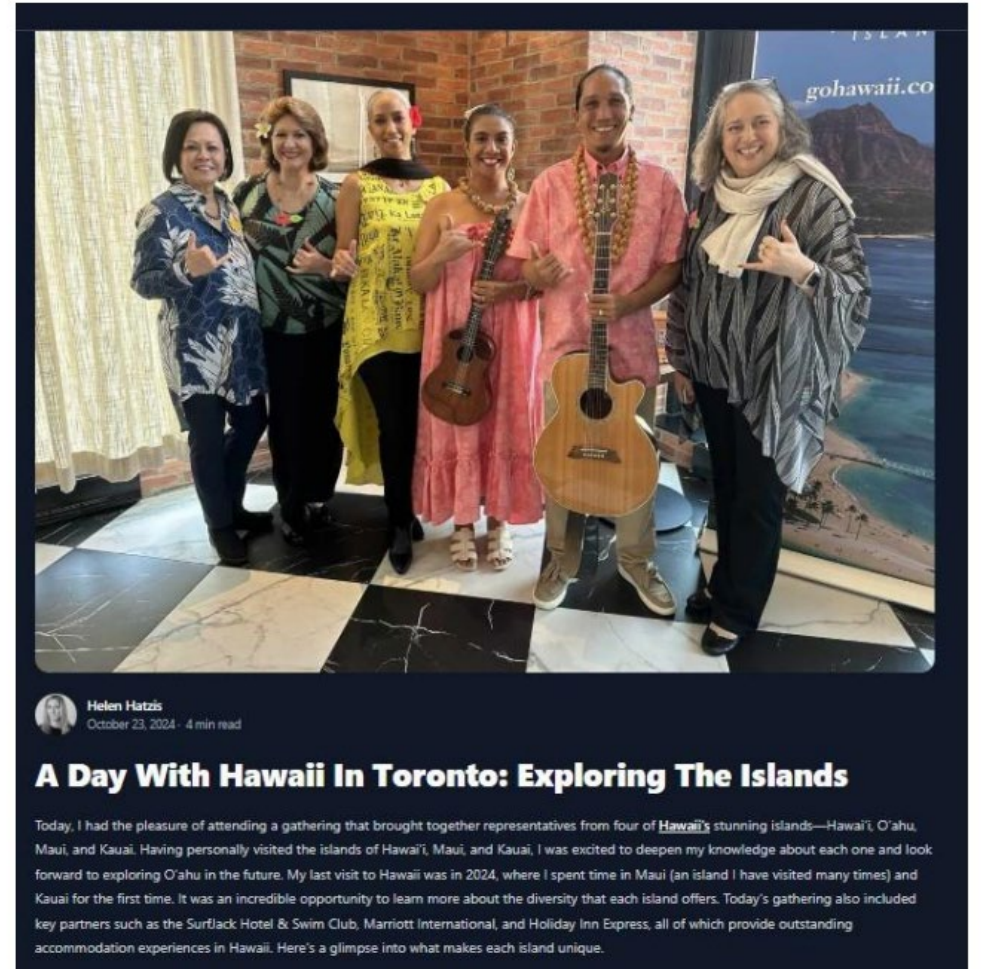
Voted Best Airline in North America

Credit: Hawai'i Tourism Authority (HTA) / Ben Ono



TRAVEL TRADE

- Aloha Canada Sales Mission – Dec 1-5
- Educational Campaign – Spoiled Agent - Apr to June
- IPW Conference June 14-18 Chicago
- Virtuoso On Tour Training Event – Calgary Mar 27
- TMP Agent Show – Toronto June 24-25
- Travel Trade Media Campaigns targeting Advisors
- Group FAM – November, Islands and Partner TBD



2025 PARTNERSHIP OPPORTUNITIES

HAWAII TOURISM
CANADA



PARTNERSHIP OPPORTUNITIES

- Aloha Canada 2025 – December 1-5 -
Format TBD – includes partner media
ops
- Agent Focused FAM – November,
islands TBD
- Webinar & Training Support
- Individual Press Trip Support – year
round
- New! Affluent Traveler Publication -
Hawai'i Luxury/Unique Directory
Opportunity – Fall 2025





PARTNERSHIP OPPORTUNITIES

- Group Media FAM Support – September, island of Hawai'i & Maui – Romance theme
- Honua Finals – High School Surfing Competition July/Aug – Accommodation Support
- Quarterly Press Releases that incorporate partner news

Ask HTCAN for details!





**MAHALO!
THANK YOU!
MERCII!**
