



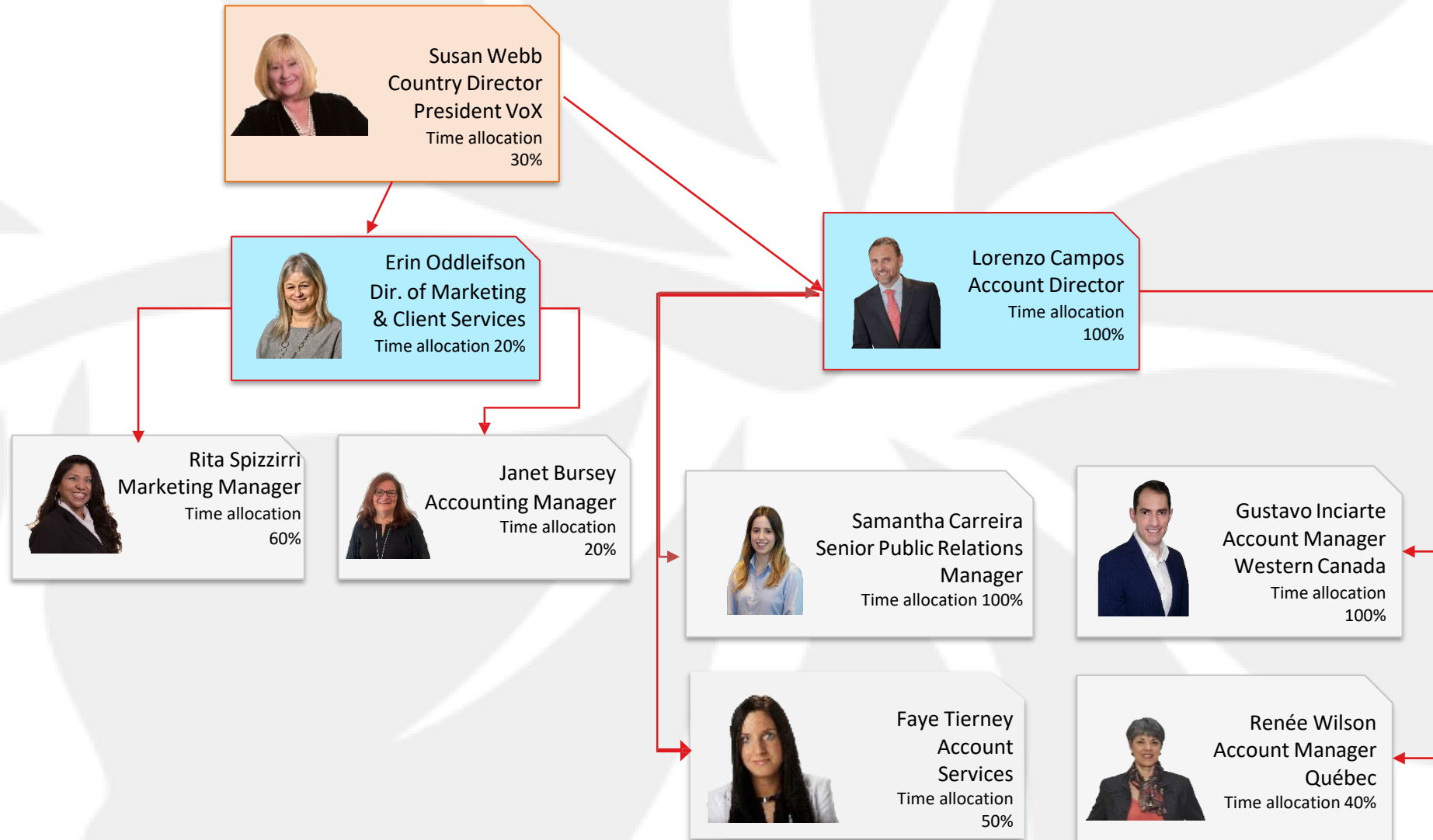
2023 HTA SPRING TOURISM UPDATE

4.12.2023

Susan Webb
President



Hawai'i Tourism Canada Team





MARKET SITUATION

GENERAL ECONOMY

- Inflation was 5.2%, it has slowed down in the last two months and projected lower rates
- Low record unemployment 5.0% in Feb (since COVID)
- GDP 0.1% in Q1 2023
- Household spending rose 4.8% in 2022
- Household disposable income rose 3.0%
- Low value of CAD



OUTBOUND TRAVEL

- Outbound Canada travel to surpass pre-pandemic levels by 2025
- Canadians have winter travel plans, 40% of outbound travelers
- Canadian travel to USA to surpass pre-pandemic levels by 2024
- Air capacity to USA in 2023 expected to reach 90% of 2019



Source: The Conference Board of Canada

OUTBOUND TRAVEL

- Hawai'i top destinations 2023
- COVID-19-related concerns subsided, health and safety measures are still important
- Canadian travelers looking for nature-based vacation
- Longer trips 9+ nights
- Sustainable accommodations and activities



Source: The Conference Board of Canada

OUTBOUND TRAVEL

- Gen Z:
 - Culturally aware
 - Open to new experiences and willing
 - Dig deeper into destinations
- Young traveler:
 - Sightseeing
 - New cultures
 - New cuisines
 - Nature
 - New people.
- Canadian travelers to explore lesser-known cities & hidden gems.
- Travelers considering price and value



Source: The Conference Board of Canada

AIR SEAT SYNOPSIS

Annual capacity similar to 2019

	2022	2023p	Change
Scheduled non-stop seats	487,215	485,774	-0.3%

- WestJet to keep its routes to all major islands (winter)
- HTCAN working with AC to bring back YUL-HNL (winter)
- HNL and OGG serviced year round



BOOKING PACE

Air Canada Vacations

- 81% increase in package holiday bookings 2023 vs 2019
- 86% increase in room night bookings 2023 vs 2019
- AC has 62 connector cities to Hawai'i across Canada
- 217% increase in passenger bookings YTD 2023 vs 2019 on direct non-stop flight from YYZ



**AIR CANADA
VACATIONS**



Travel Brands

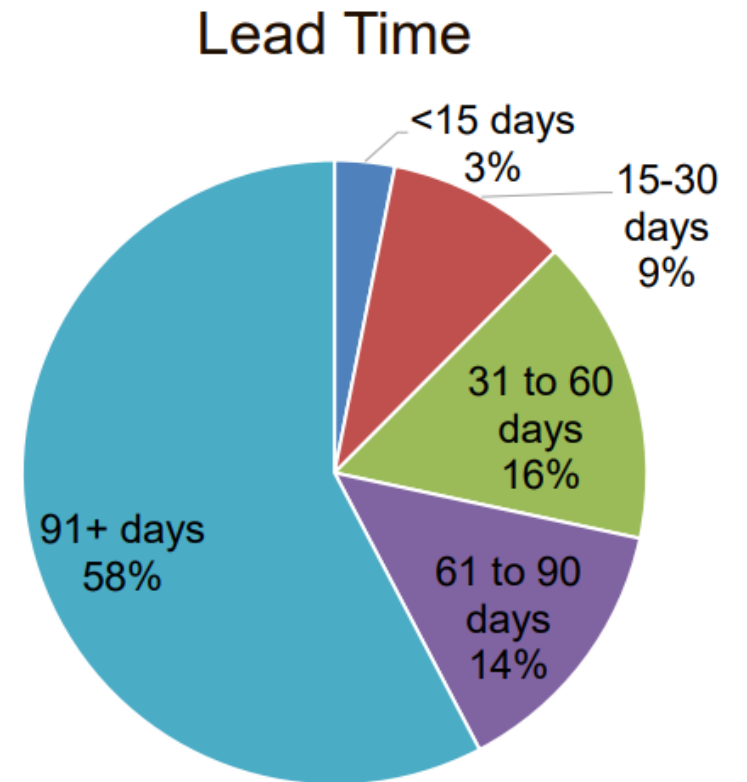
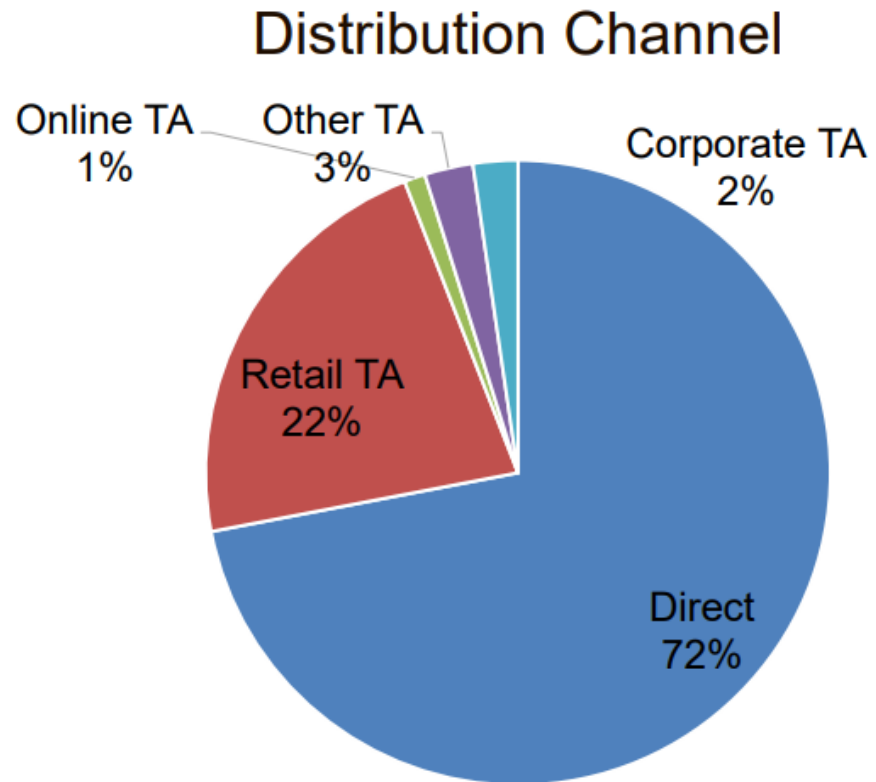
- 11% decrease over booked nights vs Q1 2022
- 71% increase of travelled nights vs Q1 2022

WestJet

- 20% increase over booked nights vs Q1 2022
- 249% increase of travelled nights vs Q1 2022

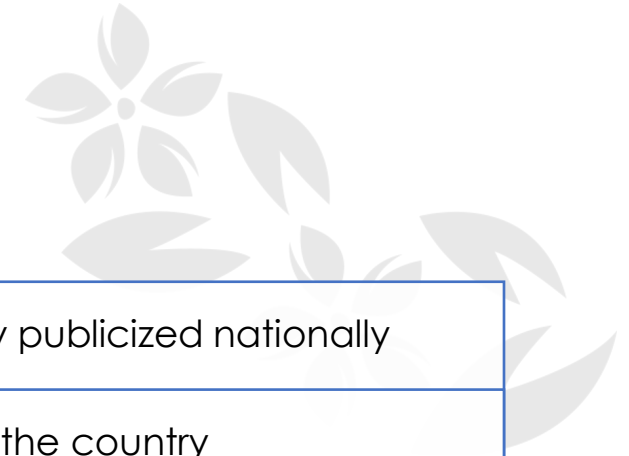


DISTRIBUTION CHANNEL & LEAD TIME



Source: ARC/ForwardKeys Destination Gateway

COMPETITIVE LANDSCAPE



	Fiji Airways commercial flights to and from Vancouver, B.C highly publicized nationally
	High number of travel trade and media events across the country
	Sun destinations offering Fam opportunities to Travel Advisors
	Canadian government advising to exercise a high degree of caution in Mexico due to high levels of criminal activity and kidnapping
	European destinations big for summer and fall leisure travel
	Cruise ship companies investing in the Canadian market



TARGET AUDIENCE

TARGET AUDIENCE



Experience Seekers



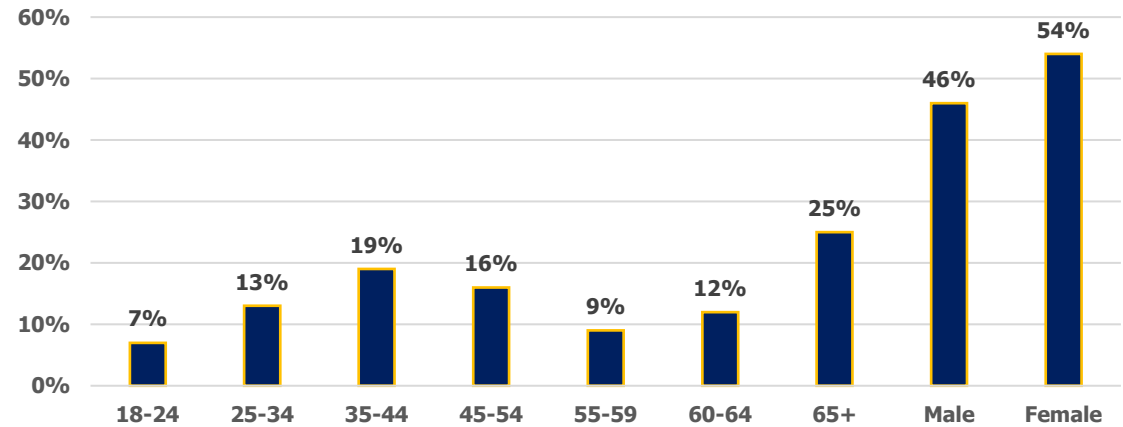
Affluent Travelers



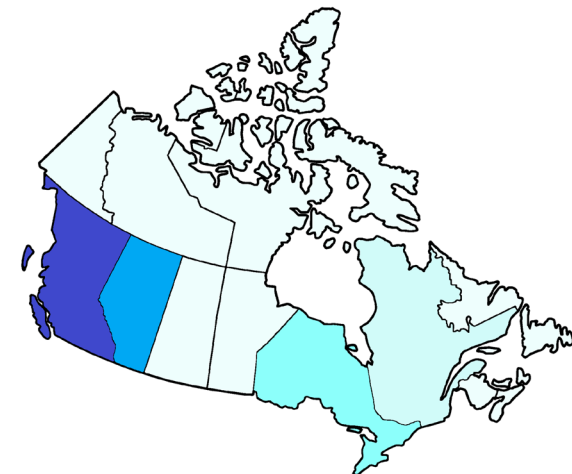
Snowbirds/Retirees



Romance



Higher than \$100k income





CORE BRANDING MESSAGE



- MĀLAMA - HAWAI'I

TAKE A TRIP THAT GIVES BACK

Mālama Hawai'i: responsible tourism, the diversity of Hawai'i's people, place, and culture.



Q1 REVIEW

CANADA STATS



Year-to-date February 2023 Quick Facts^{1/}

Visitor Expenditures:	\$301.6 million
Primary Purpose of Stay:	Pleasure (101,633) vs. MCI (7,092)
Average Length of Stay:	12.56 days
First Time Visitors:	30.8%
Repeat Visitors:	69.2%

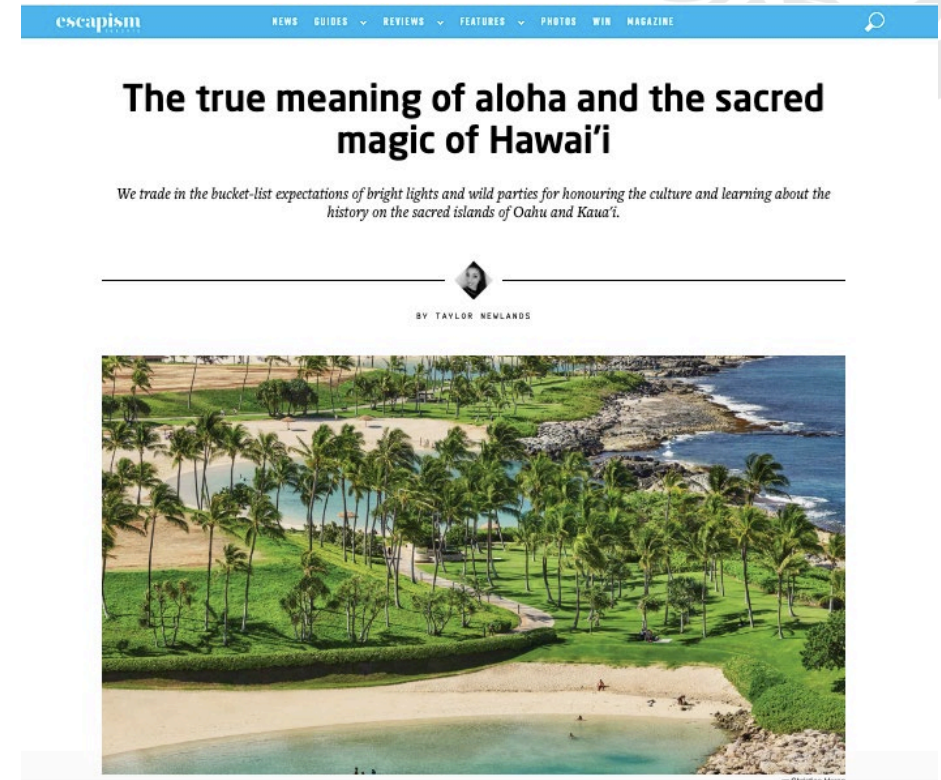
CANADA MMA (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Feb. 2023P	YTD Feb. 2022P	% Change
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	928.2	1,130.50	301.6	148.2	103.5%
Visitor Days	6,554,493	2,265,568	1,364,326	4,928,356	5,716,654	1,398,719	830,919	68.3%
Arrivals	540,103	164,393	87,900	399,869	461,829	111,361	52,597	111.7%
Average Daily Census	17,958	6,190	3,738	13,502	15,662	23,707	14,083	68.3%
Per Person Per Day Spending (\$)	165.0	NA	176.4	188.3	197.8	215.7	178.3	20.9%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,321.3	2,447.9	2,708.6	2,817.5	-3.9%
Length of Stay (days)	12.14	13.78	15.52	12.32	12.38	12.56	15.80	-20.5%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2023 annual forecast (Quarter 1, 2023).

MAJOR INITIATIVES/ACTIVITIES

- HTCAN reprogramming marketing activities
- Social media regular posts
- Outreach to journalists and influencers to pitch story ideas
- Ongoing contact with airlines, tour operators and travel agents
- Digital video campaign



MAJOR INITIATIVES/ACTIVITES

Coop and paid campaigns

- WestJet: owned and paid media
- Air Canada Vacations: owned and paid media
- TravelBrands: retail and trade
- TravelZoo: consumer awareness
- Zoomer: consumer 55+ focus

2023 Media

- Catherine Maisonneuve, La Presse/Elle Quebec - visiting Island of Oahu in April 2023
- Kim Pemberton, Victoria Times Colonist (Secured coverage, will pitch additional publications) - visiting Island of Hawaii and Kauai in June 2023
- Natalie Preddie, On-Air Travel Expert, Late Spring 2023 visit Islands TBD

WESTJET 

 **AIR CANADA
VACATIONS**

 **TravelBrands**

TRAVELZOO[®]

ZOOMERMEDIA

HAWAII TOURISM
CANADA



BMP UPDATE

FUTURE MAJOR INITIATIVES

- Air Canada Vacations
 - 25,000 impressions
- WestJet Vacations
 - 2.9 million impressions
- TravelBrands
 - 7000K subscribers – 1.8M unique monthly website visitors
- TravelZoo campaign
 - Story 2 million reach - Static Social Post includes 100K impressions
- Zoomer campaign
 - 468,158 digital impressions + 30,443,000 radio impressions



CONSUMER CAMPAIGN



Three segment categories for paid social media, Contextualizing, Island Spotlights and then Mālama Hawai'i.



Tactic	Impressions
Advanced TV Package	403,750
Online Video	1,884,167
Social Media	3,230,000
Grand Total	5,517,917

CONSUMER CAMPAIGN



Mālama Hawai'i will feature videos of reforestation, aquaculture, sustaining farming and habitat stewardship

Mālama Hawai'i videos will also be leveraged for Connected TV and online video



VIRTUOSO TRADE EVENTS

300 agents will be trained

Networking and professional development training - opportunities to connect, learn and build meaningful relationships

April 11-12, 2023 Montreal

April 13-14, 2023 Toronto



VIRTUOSO.
SPECIALISTS IN THE ART OF TRAVEL



HAWAII TOURISM
CANADA



FAM TRIPS – CONSUMER NIGHTS

Media Group Fam and Product development Fam taking place in June 2023

- 2 island fam trip
- 4 media + HTCAN escort
- 6 product development managers
- Mālama Hawai'i activities
- Increased knowledge of the Hawaiian Islands



Consumer nights with retail travel agencies pushed for May and June

- 45 guests will join travel advisors at their retail travel agencies office for a night of education to highlight sustainable travel and Mālama Hawai'i activities
- Vancouver and Toronto



TRAVELWEEK EDUCATIONAL CAMPAIGN

HTCAN, in partnership with the Island Chapters & the Native Hawaiian Hospitality Association (NaHHA), will invite travel advisors to participate in three webinars focused on Island updates & how NaHHA reimagines the practice of mālama through the lens of regenerative tourism for the benefit of Hawai'i

- Apr 18 – NaHHA
- Jun 15th – The Island of Hawai'i and Kaua'i
- Jun 29th – O'ahu & Maui

The Hawai'i destination specialist program

- Highlighted in all three webinars
- Digital banner Ads
- Landing page on TravelWeek eLearning platform





PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
TRADE FAMILIARIZATION TRIPS (FAMS)				
Product Development fam trip	June	6 Product Managers will be visiting and experiencing two of the Hawaiian Islands to learn about them and develop or improve the already existing product	Kaua'i & Maui	In kind room nights, air tickets, activities, meals
TRAVEL TRADE EDUCATION				
Travel Week Educational Campaign (Trade)	May-June	HTCAN will organize, using the Travel Week platform two webinars: Pono and Kuleana	Online	In kind prizes for participants

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
PUBLIC RELATIONS				
Group Media Fam	June	5 traditional travel journalists will be visiting two of the Hawaiian Islands with the theme “The Hawaiian Islands: the Iconic & the Unexpected”	IoH & Maui	In kind room nights, air tickets, activities, meals
Individual media fams	Mar-Jun	HTCAN will send at least 3 individual journalists to different islands to curate authentic stories about Hawai'i	Islands TBD	In kind room nights, air tickets, activities, meals
Media event	June	HTCAN will host a media event with cultural activities so both, consumer and trade media, can experience Hawaiian culture firsthand	Toronto	In kind prizes for the journalists
CONSUMER PROMOTIONS				
Consumer nights	May-Jun	HTCAN will organize 2 consumer nights partnering with a large travel agency on which HTCAN will talk about the importance of the responsible travel and the mālama and kuleana values	Vancouver and Toronto	In kind prizes for the attendees



**MAHALO
MERCI
THANK
YOU**

HAWAII TOURISMTM
CANADA