



INDUSTRY PARTNERS MEETING

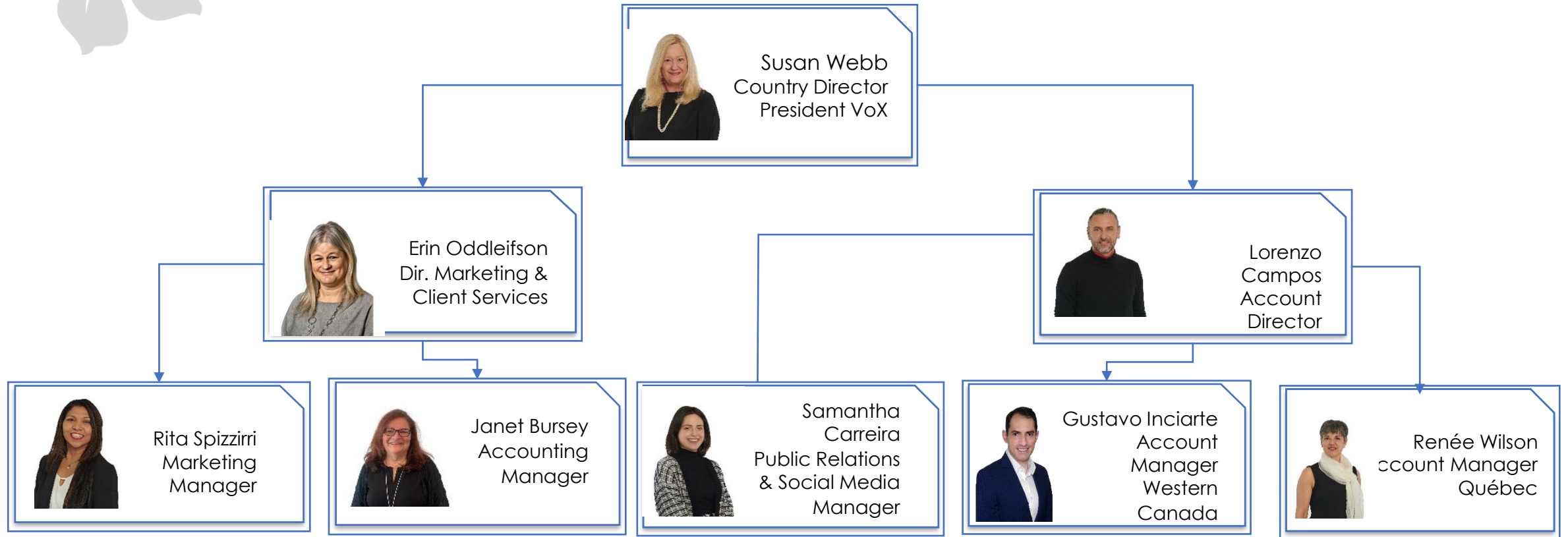
8.25.2023

LORENZO CAMPOS
ACCOUNT DIRECTOR





HAWAI'I TOURISM CANADA TEAM










MARKET SITUATION

TRAVEL ZOO MEMBER SURVEY

Our members =
your best guests

 **49%**
ages 45+,
51% ages 18-44

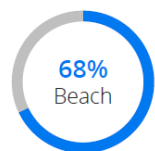
 **55%**
female, 45% male

 **99%**
have valid passport
compared to 42%
of Canadian population

 **55%**
HHI of \$100K+
compared to 32%
of Canadian population

* Google Analytics, average taken over
November 2021 to October 2022
Sources: Travelzoo Travel Outlook 2023 member
survey in Canada; survey tool Alchemer;
October 2022; random selection; n=1,574

Top 3 activities on next vacation outside of Canada



81%
are open to new destinations and travel ideas

4 in 5
are hunting for travel deals to maximize their travel budget

80%
are prioritizing leisure travel, and view this as their most
important discretionary spend

1 in 2
want to eat and shop local during their travels

50%
want to visit somewhere completely new

Source: Travelzoo Canada member survey; survey tool Alchemer; April 2023; n=1,976

Top 10 U.S. states
Canadian members
are most interested in

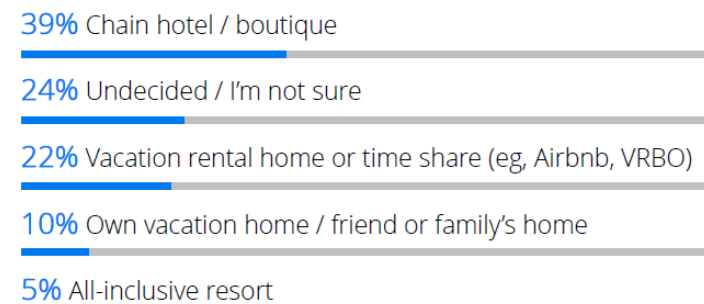
- 1 California
- 2 Florida
- 3 Hawaii
- 4 New York
- 5 Arizona
- 6 I am open to inspiration
- 7 Nevada
- 8 Washington
- 9 Alaska
- 10 Oregon

68%
are interested in travelling to the U.S. in the next 2 years,
14% are undecided

On their next U.S. vacation plan to stay



On their next U.S. vacation plan to stay
in paid accommodations



CANADIAN MARKET SNAPSHOT

- Consumer confidence high
- Unemployment record low
- Interest rate hike possible
- CAD \$0.74 USD
- Now 90% of 2019 outbound travel
- 48% focus on sustainable travel
- 57% **vacation deprived** (Gen Z 74%)
- 72% prioritize travel
- Cultural travel important
- Wellness travel growing



AIR OVERVIEW - SEATS

Monthly Canada Seats by Island 2023						
	DepCity	STATE	HNL	OGG	KOA	LIH
Jul	Vancouver	21,266	10,633	10,633		
Aug	Vancouver	21,266	10,633	10,633		
Sep	Vancouver	18,552	10,290	8,262		
Oct	Vancouver	22,330	11,662	9,460	860	348
Nov	Calgary	5,714	1,352	4,362		
	Vancouver	49,949	20,406	18,492	8,093	2,958
	Total	55,663	21,758	22,854	8,093	2,958
Dec	Calgary	12,412	5,170	6,720	522	
	Edmonton	1,740	522	1,218		
	Toronto	3,235	2,341	894		
	Vancouver	52,360	20,744	19,004	8,262	4,350
	Total	69,747	28,777	27,836	8,784	4,350

Monthly Canada Seats by Island 2024						
	DepCity	STATE	HNL	OGG	KOA	LIH
Jan	Calgary	10,912	3962	6254	696	
	Edmonton	1,566	696	870		
	Toronto	3,576	2384	1192		
	Vancouver	52,012	21092	19004	7914	4002
	Total	68,066	28,134	27,320	8,610	4,002
Feb	Calgary	11,114	4136	6282	696	
	Edmonton	1,392	696	696		
	Toronto	3,576	3278	298		
	Vancouver	49,452	19894	19024	7054	3480
	Total	65,534	28,004	26,300	7,750	3,480
Mar	Calgary	13,748	5518	7360	870	
	Edmonton	1,740	870	870		
	Toronto	4,255	3957	298		
	Vancouver	53,404	21266	20570	7566	4002
	Total	73,147	31,611	29,098	8,436	4,002
Apr	Calgary	7,106	2918	3840	348	
	Edmonton	696	348	348		
	Toronto					
	Vancouver	44,555	19710	17622	6005	1218
	Total	52,357	22,976	21,810	6,353	1,218
May	Calgary					
	Edmonton					
	Toronto					
	Vancouver	18,731	10633	8098		
	Total	18,731	10,633	8,098		

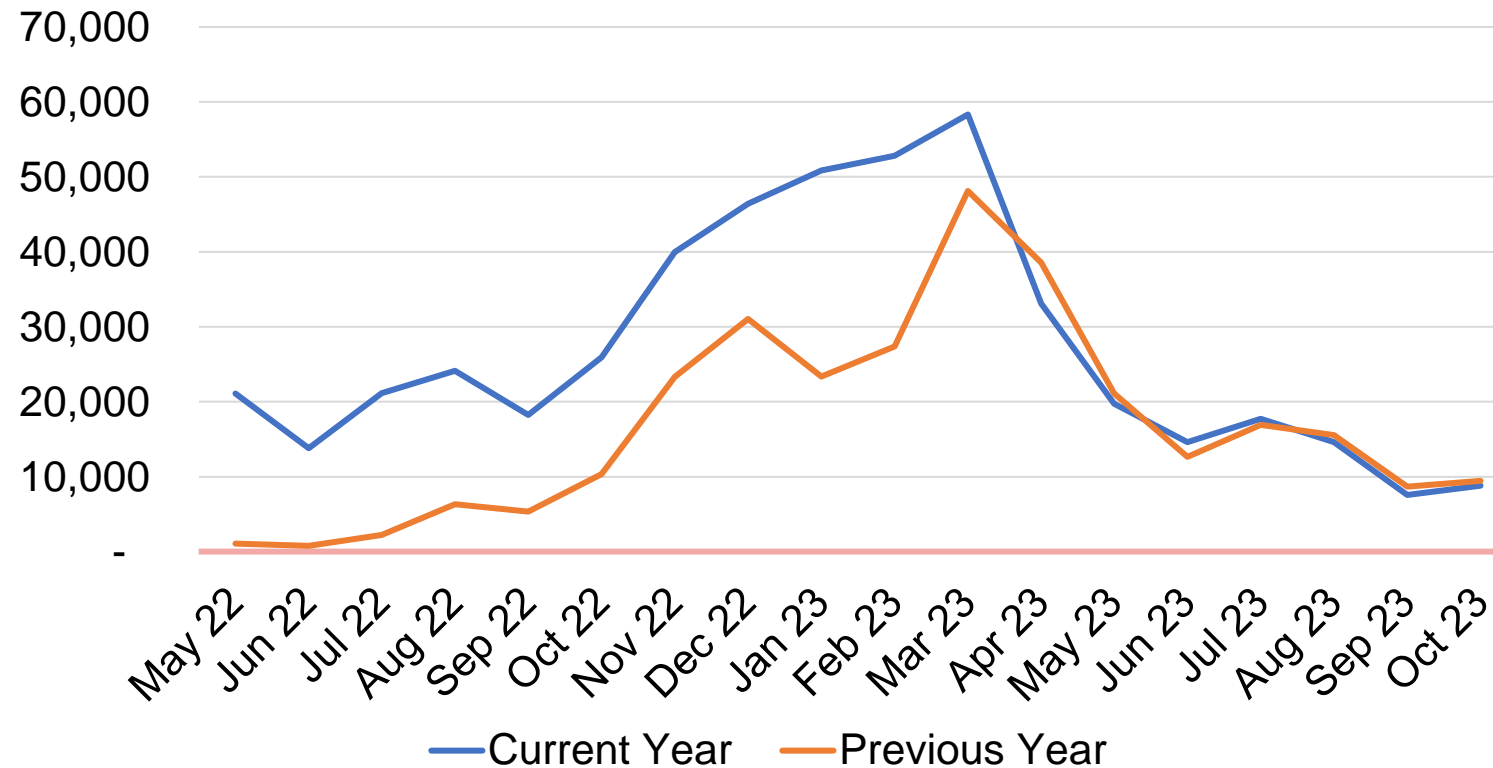


Source: DIIO Airline database, data pull as of 6-8-23, subject to change.

Arrivals in Hawai'i & outlook from Direct and Travel Agency booking
for the past 12 months and the next 6 months

BOOKING PACE

AIR BOOKING TRENDS



COMPETITIVE LANDSCAPE



All-inclusive
resorts
Caribbean
Mexico



Fiji



Australia



Europe



CHANGING MEDIA LANDSCAPE

- Newsroom shrinkage
- Titles now only digital
- Video rules
- Rise in Micro Influencers
- Blurring of paid/earned media
- Media consumption by consumers
- Travel review websites are top sources for travel planning
- Social media influencing travel decisions





TARGET AUDIENCE

TARGET AUDIENCE



Experience Seekers



Affluent Travelers



Snowbird/Retirees



Romance

Mindful Travelers

High
spending
traveler

High value
traveler

Lifetime
value
traveler



AVID TRAVELERS CANADA



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

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



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





CORE BRANDING MESSAGE

CORE BRANDING MESSAGE

- Mālama is the overarching message
- Educating the visitor on the value of Aloha, Mālama, Kuleana & Ho'okipia
- Themes for the Messaging will be focused on culture, culinary, romance, wellness, outdoor adventure and family



2023 BMP Q1 - Q2 REVIEW



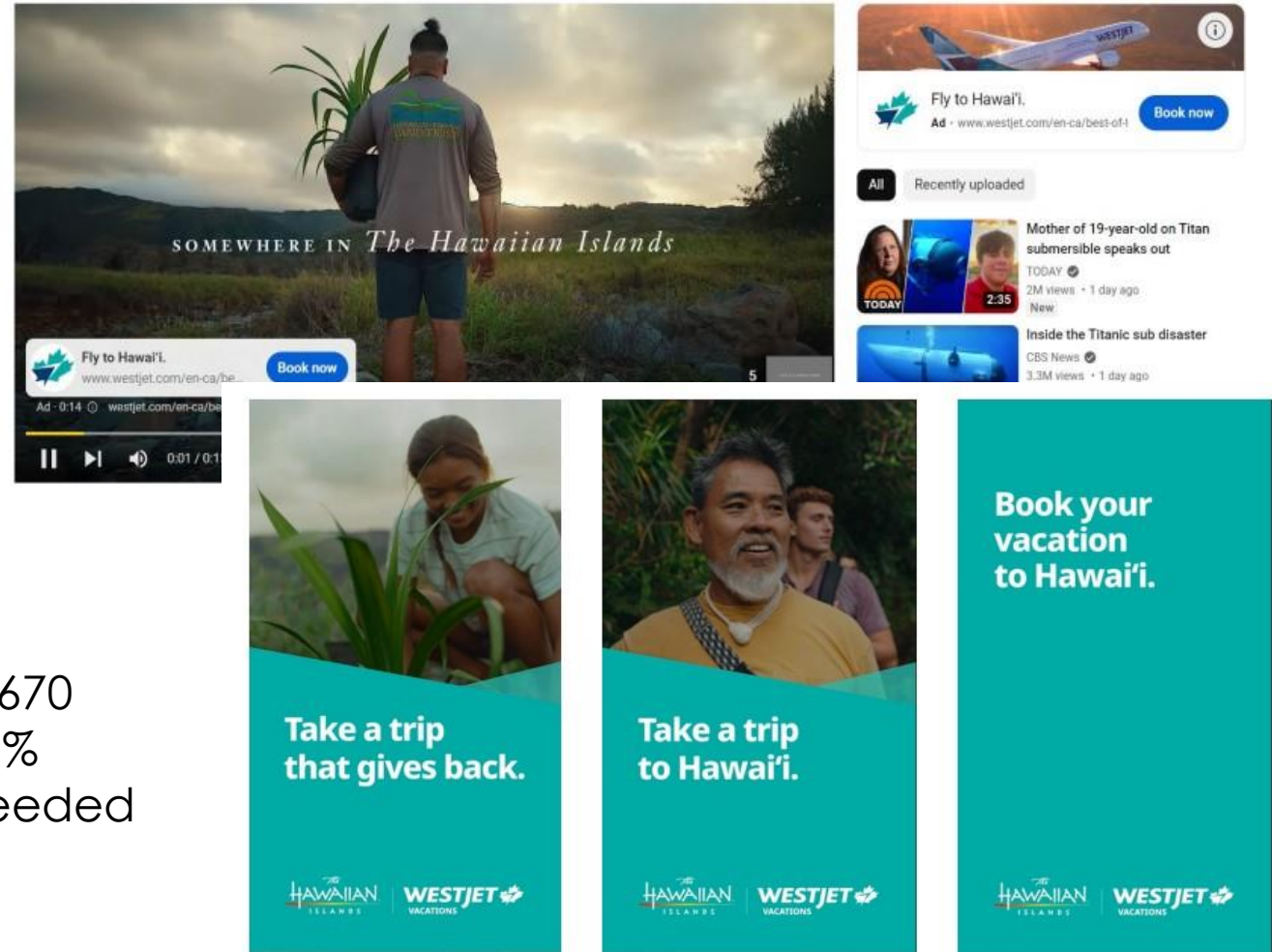
WESTJET CAMPAIGN 2023

Emails

- March – HNL = 3,080 impressions
- March – OGG = 3,460 impressions
- April – OGG = 2,641 impressions
- April – HNL = 2,254 impressions
- May - OGG = 2,195 impressions
- May – HNL = 1,777 impressions

YouTube

- Target Clicks = 918 exceeded at 6,670
- Target CTR = .04% exceeded at .19%
- Target impressions = 2,112,694 exceeded at 3,547,468



TRAVELBRANDS CAMPAIGN 2023

TravelBrands Website

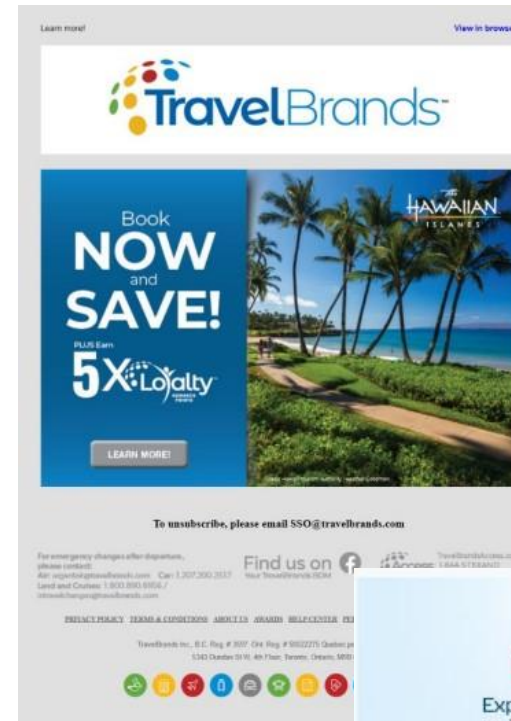
- Homepage Banner – 94,806 impressions
- Landing Page – 52,120 impressions

Digital Advertising

- Display and Remarketing - 640,000 impressions
- Browser Push - 501,651 impressions

Social Media

- Instagram – 13,392 impressions
- Facebook – 16,703 impressions



HAWAII TOURISM
CANADA



ZOOMER CAMPAIGN 2023

Digital Advertising

- **Total Impressions** -254,971
- **Videos** - 36,360 impressions
- **Banners** -179,978 impressions
- **Newsletters & Eblasts** - 38% open rate



HAWAII TOURISM
CANADA



SPRING FAM TRIPS 2023

Travel Trade Product Managers

8 Participants visited the islands of Maui and Kaua'i.

Toundra Voyages - Voyages Gendron -
Groupe Voyages Quebec - Senior
Discovery Tours - WestJet - TravelBrands



Media Partners

8 participants visited the islands of Maui and Hawai'i

Calgary Herald - Daily Hive - Range -
Montecristo



HAWAII TOURISM
CANADA

TRADE SHOWS 2023

2023 Virtuoso On Tour events in Montréal and Toronto. 90 appointments



TRAVEL EDUCATION SESSIONS 2023

TravelWeek Hawai'i Destination Special Trainings:

- May 16 – NaHHA Cultural webinar on the Season of Kū 48 attendees
- June 18 – islands of Kaua'i and Hawai'i 57 attendees
- June 29 – islands of Maui and O'ahu. 58 Attendees



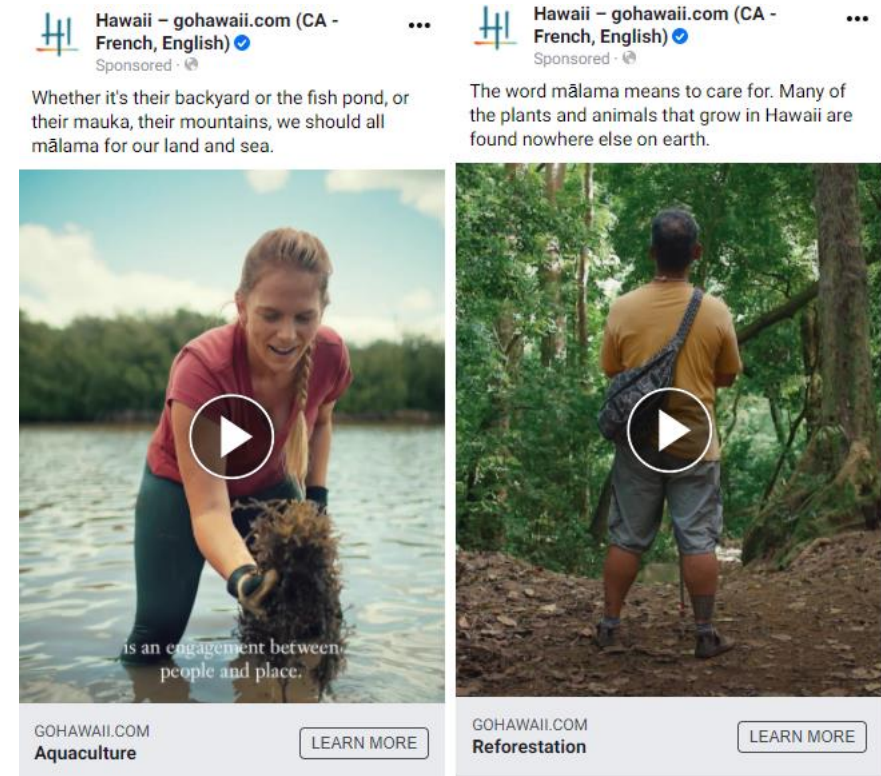
IPW San Antonio 2023

- Successful luncheon with 22 Canadian partners. Attendees shared their support for the Hawaiian Islands and exchange ideas and marketing plans.
- 23 Appointments with the Canadian Delegation.


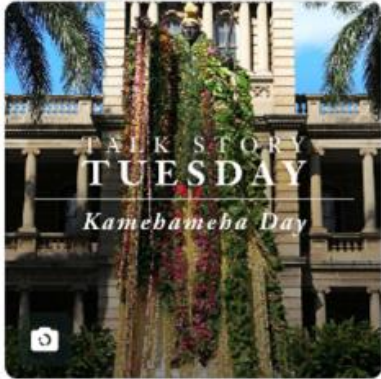





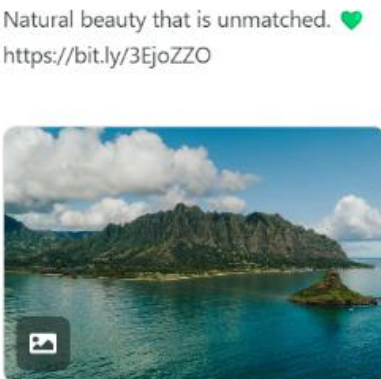


SOCIAL MEDIA Q1 & Q2 2023

- Canada dedicated channels
- Canadian content creation
- Mālama messaging
- High consumer engagement
- Tracking
- Amplified brand messaging
- Island Chapter collaboration
- Amplify earned & owned channels

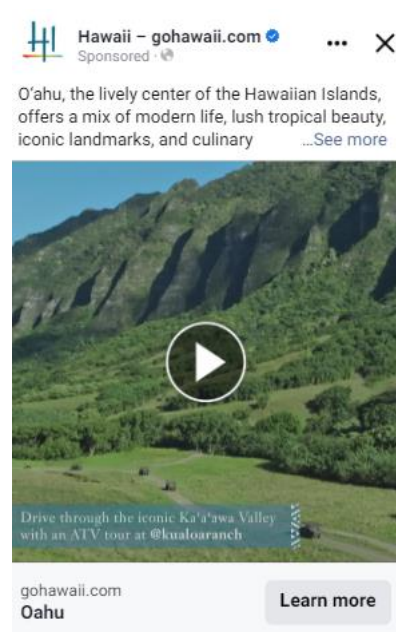
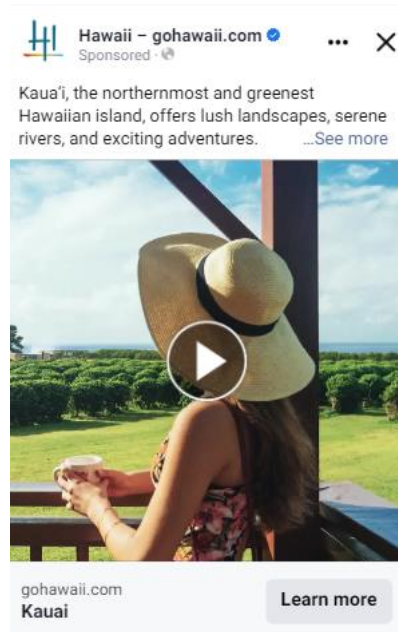


TOP PERFORMING POSTS Q1 & Q2 2023

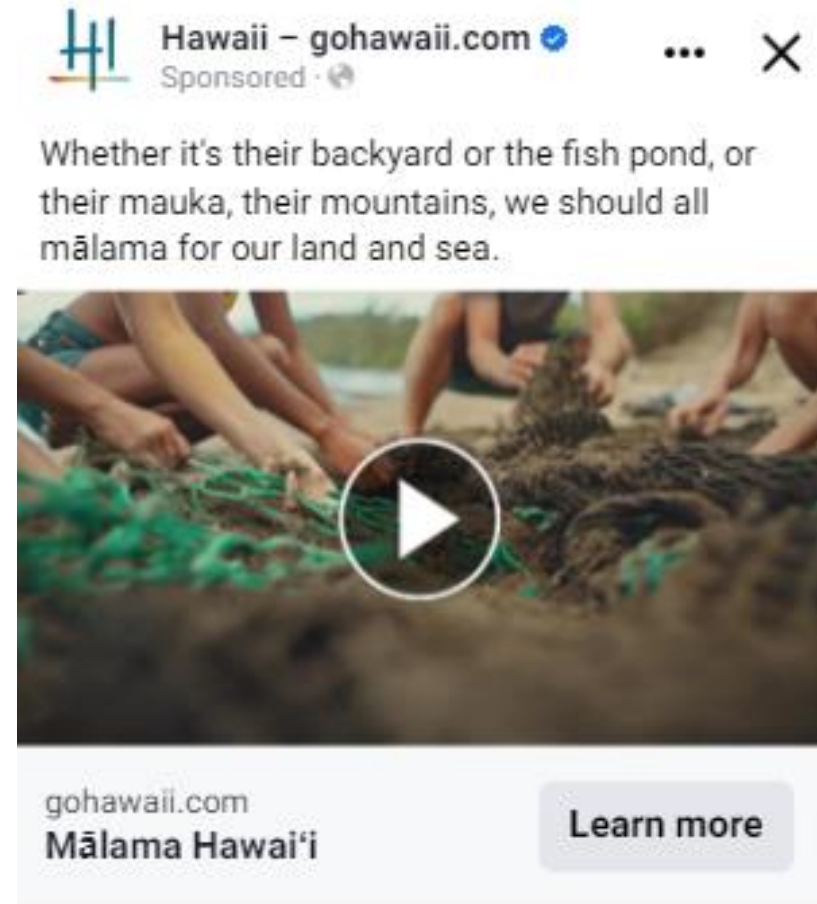
<div><div><div><div>G</div><div> gohawaiiica</div><div>Mon 6/12/2023 7:52 pm EDT</div></div><div></div><div><div>Impressions178</div><div>Reach177</div><div>Comments0</div><div>Story Taps Back1</div></div></div></div>	<div><div><div><div>G</div><div> gohawaiiica</div><div>Mon 6/12/2023 7:52 pm EDT</div></div><div></div><div><div>Impressions126</div><div>Reach124</div><div>Comments0</div><div>Story Taps Back5</div></div></div></div>	<div><div><div><div> Hawaii – gohawaii.c...</div><div>Sun 6/11/2023 6:07 pm EDT</div></div><div></div><div><div>Impressions2,391</div><div>Reach2,264</div><div>Engagements58</div><div>Engagement Rate (per Impression)2.4%</div></div></div></div>	<div><div><div><div> Hawaii – gohawaii.c...</div><div>Tue 6/13/2023 9:58 pm EDT</div></div><div></div><div><div>Impressions2,472</div><div>Reach2,328</div><div>Engagements68</div><div>Engagement Rate (per Impression)2.8%</div></div></div></div>
---	--	--	--

SOCIAL MEDIA 2023

- HTCAN was able to exceed the number of digital impression goals for the first half of 2023, driving further awareness for the Mālama and Kuleana messages.

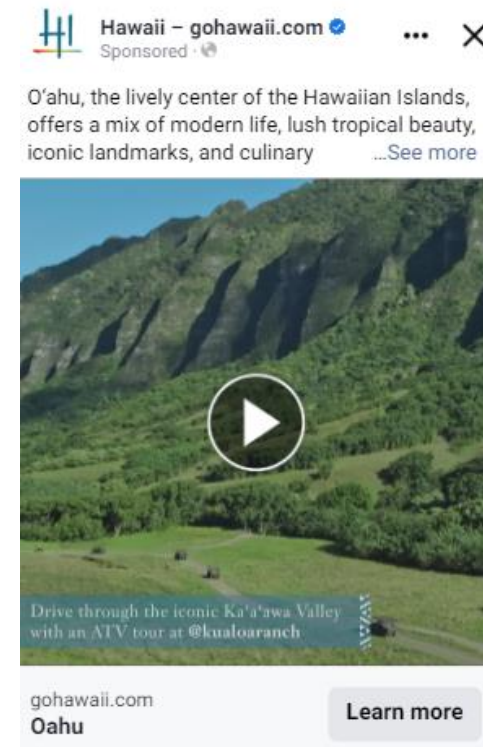


HAWAII TOURISM
CANADA



SOCIAL MEDIA 2023

Results YTD	FACEBOOK	INSTAGRAM	TWITTER
Impressions	4,188,436	136,461	25,248
Interactions	452,324	24,136	2,719
Fan Count	51,128	5,286	5,601
Fan Increase	224	42	85
Total Posts	49	94	52



MEDIA COVERAGE Q1 & Q2 2023

- Nuvo Magazine
- Vancouver Sun
- La Presse

NUVO

A Culinary Journey on the Hawaiian Islands of Oahu and Kauai

From the dish created for young surfers to daily catches and locally sourced produce, these Hawaiian Islands are hubs for gastronomic delights.

Writer Sabrina Pirillo



Travel

Oahu or Kauai – which island is right for you?

Linda Barnard

Published Feb 11, 2023 • Last updated Feb 11, 2023 • 4 minute read

[Join the conversation](#)



Panoramic view of Hawaii's Waikiki Beach with Diamond Head in the background. PHOTO BY GETTY IMAGES

Reviews and recommendations are unbiased and products are independently selected. Postmedia may earn an affiliate commission from purchases made through links on this page.

Hawaii sans le surtourisme



PHOTO CALEB JONES, ARCHIVES ASSOCIATED PRESS

Pendant la pandémie, les plages d'Hawaii étaient désertées, comme sur cette photo prise en octobre 2020 à Honolulu.

Depuis la reprise, Hawaii se porte merveilleusement bien, et les habitués du « Aloha State » retrouveront leur destination chouchou... à quelques bémols près.

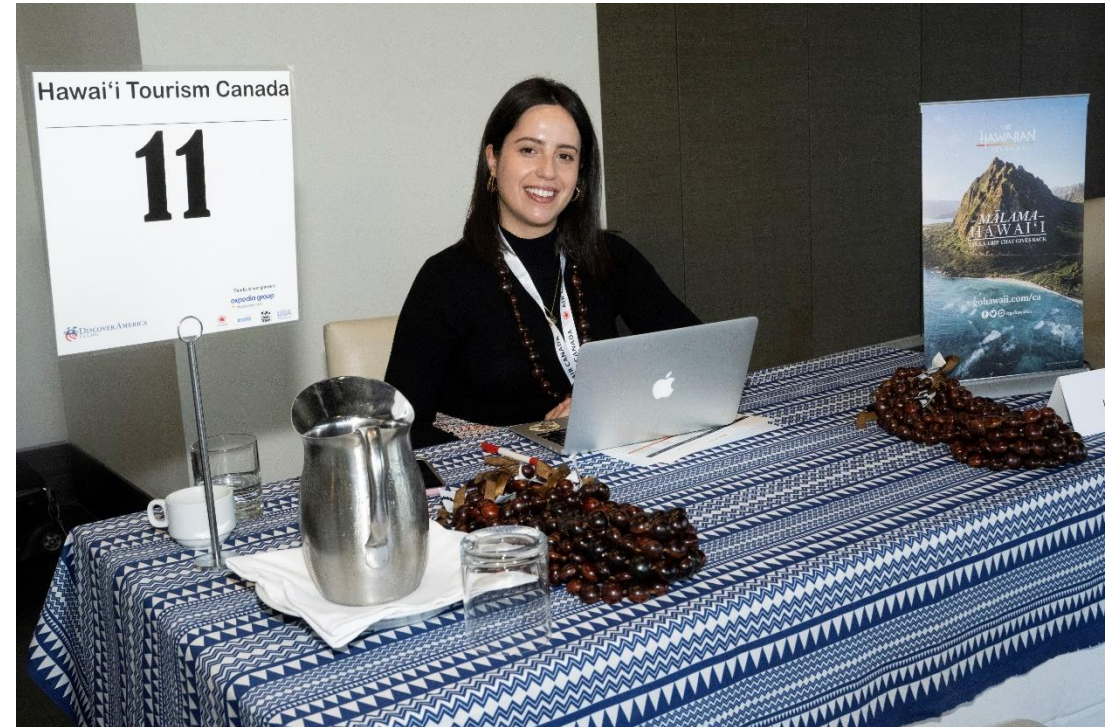
HAWAII TOURISM
CANADA

2023 BMP Q3 - Q4



PR INITIATIVES 2023

- Group Fam: early November 2023
 - O'ahu and Kaua'i
 - Theme: Hawai'i's Culinary Scene: From Farm to Table
- Discover America Media Day Toronto : October 26th
- Aloha Canada Media Interviews & Reception
 - Facilitate trade media and broadcast interviews in Toronto and Vancouver
 - Host media reception in Vancouver



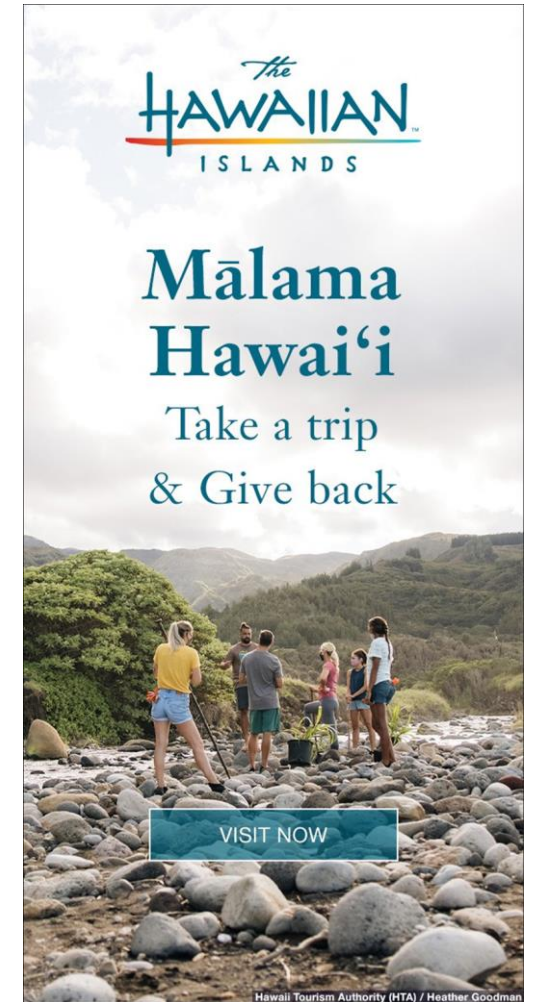
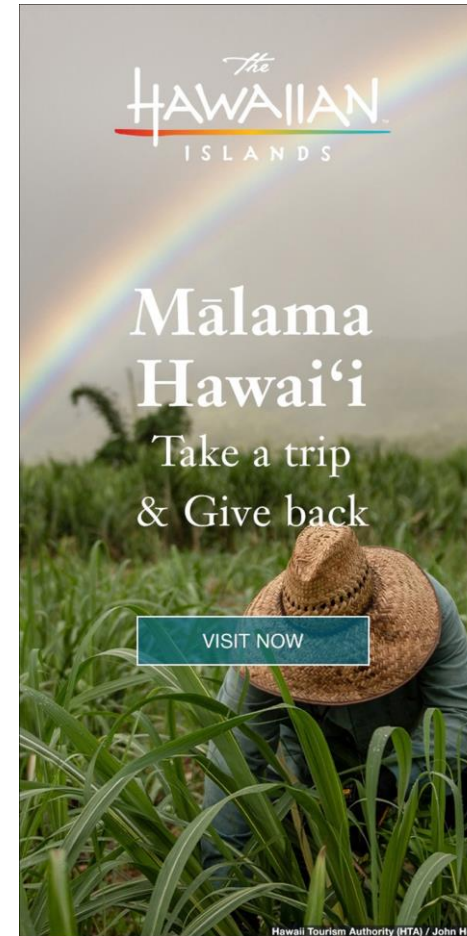
TRAVEL TRADE INITIATIVES 2023

- Air Canada Vacations' product launches across Canada September
 - Vancouver – Tuesday, September 12, 2023
 - Toronto – Thursday, September 21, 2023
 - Outrigger and Aqua Aston partners
- Cooperative campaigns
 - Air Canada
 - WestJet
 - TravelBrands



CONSUMER DIRECT 2023

- SITV Consumer Show in Montreal: November 2023
- Organic posting directed towards achieving both traffic and engagement objectives
- Creative content aimed at driving engagement of Mālama Hawai'i and inspirational posts



DIGITAL CAMPAIGNS 2023

- Advanced TV
 - Connected TV
 - CTV retargeting
 - Linear TV extension
- Broadcast Specialty Shows
- Video Content
- Digital Magazines
- Mālama messaging



ALOHA CANADA 2023

- December 4 - 7
- Toronto, Calgary, Vancouver
- Hawai'i & Canadian partners
- Island Chapters
- 3 major markets and on-line
- Trade and PR
- Cultural component
- Destination Specialist Program
- Promotional tools
- Sustainable events
- Mālama, kuleana, aloha and ho'okipa emphasis





**MAHALO!
THANK YOU
MERCI**
