2022 BMMP

HTA Winter Tourism Update
2.9.2022

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HAWAI'I TOURISM CANADA TEAM

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MARKET SITUATION
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- All air travelers (except those from the U.S.) will have to undergo testing at airport on arrival in Canada
- Expecting reduction of travel requirements soon

### Economic Indicators

<table>
<thead>
<tr>
<th>Economic Indicators</th>
<th>2019</th>
<th>2020</th>
<th>2021f</th>
<th>2022f</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP, market prices (2012 $) (%) change</td>
<td>-5.3%</td>
<td>5.1%</td>
<td>4.4%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Real Disposable Income (2012 $) (%) change</td>
<td>9.5%</td>
<td>0.2%</td>
<td>-2.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Household Spending (2012 $) (%) change</td>
<td>-6.0%</td>
<td>4.8%</td>
<td>5.9%</td>
<td>2.1%</td>
</tr>
<tr>
<td>CAD/USD</td>
<td>$1.34</td>
<td>$1.25</td>
<td>$1.26</td>
<td>$1.27</td>
</tr>
</tbody>
</table>

Source: Conference Board of Canada (October 2021 Outlook), Scotia FX World Outlook

### Unemployment Rate

<table>
<thead>
<tr>
<th>Month</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 21</td>
<td>6.0%</td>
</tr>
<tr>
<td>Apr 21</td>
<td>5.9%</td>
</tr>
<tr>
<td>Jul 21</td>
<td>6.7%</td>
</tr>
<tr>
<td>Oct 21</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

Source: TRADINGECONOMICS.COM | STATISTICS CANADA

### Vaccination Status

- **Fully vaccinated**
  - Total 12 and older: 83.75%
  - 5-11: 88.08%
  - 83.75% of those aged 12 and older, and 88.08% of those aged 5-11 are fully vaccinated.

- **Received at least one dose**
  - Total 12 and older: 77.94%
  - 5-11: 81.97%
  - 77.94% of those aged 12 and older, and 81.97% of those aged 5-11 have received at least one dose.

- **Fully vaccinated with additional dose**
  - Total 18 and older: 37.31%
  - 45.99%
  - 37.31% of those aged 18 and older have received both doses.

Source: www.Canada.ca Date: January 28, 2021
Airlift, Travel Sentiment & Competitors

Air Canada

160K seats for the Winter 2021/2022 & 3 new routes

WestJet

150K seats for the Winter 2021/2022 & 1 new route

Direct Competitors

Mexico: disengaged promotion from different destinations and hotel chains

Jamaica: trade training webinars, consumer advertising (TV, social, POP), trade events, FAMs

Visit Florida: training webinars, virtual events, the Weather Network campaign, media FAMs

Travel Sentiment

- Pent-up demand
- Flexibility in booking required
- Safety & health protocols (BUSA)
- Intentions: Friends & Family 24%
  Beach Trip 20%
  Hike/walk holiday in countryside 14%
TARGET AUDIENCE
TARGET AUDIENCE

Experience seekers
Romance
Snowbirds/Retirees
Affluent travelers

Higher than $100K income
**STRATEGY**

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

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**CONSUMER**
- Social media (organic & paid)
- Online video
- Broadcast

**PUBLIC RELATIONS**
- Individual & group FAM trips
- Aloha Canada media mission
- Travel Media Association of Canada
- Discover America Canada

**TRAVEL TRADE**
- Partnerships TOs and airlines
- MCI & Travel Trade media
- Education: Webinars, Trade shows, Newsletters
- Aloha Canada Advocates
- Product FAM
Visitor education
- Through Mālama advocates (travel professionals)
- Mālama/Kuleana video placing (airlines, travel agencies)
- Social networks @GoHawaiiCa
- Joint ventures (airline, tour operators and OTAs)

DMAP strategy
- Include DMAP actions in each BMMP activity
- HTCAN team trained on the DMAPs
- Stress Sensitivity List on promotionals
- Heavy cultural component
- Create alliances with voluntourism programs
Aloha Canada trade/media mission
October 2022

- Hybrid (virtual/in person) concept
- 3 cities
- Cultural component (NaHHA)/ cultural practitioners
- 500+ agents to be trained
- 20+ partners
- 15+ media
KEY CAMPAIGNS/PROGRAMS

Media group FAM
May 2022

• 2 island FAM trip
• 4 media + HTCAN escort
• Mālama Hawai‘i activities
• Hawai‘i made products
• Increased knowledge of the Hawaiian Islands
• High number of impressions through online and/or print media

Product development group FAM
September 2022

• 2 island FAM trip
• 8 product development managers + HTCAN escort
• Mālama Hawai‘i activities
• Hawai‘i made products
• Increased knowledge of the Hawaiian Islands
• High number of developed products
Cooperative Programs
Spring & Fall 2022

• 3 major tour operators/airlines
  • Air Canada Vacations
  • TravelBrands
  • WestJet Vacations
• High consumer component
• DMAP actions covered
• Consumer educational campaigns
• High number of bookings
• Extend travel season
KEY CAMPAIGNS/PROGRAMS

Consumer digital and broadcast
Spring & Fall 2022

Broadcast JVs

Paid social and digital

expedia group

Global

HAWAI‘I TOURISM
CANADA
PERFORMANCE MEASURES
## PERFORMANCE MEASURES

### Annual Target | Semi-Annual Targets
---|---
**Consumer Paid Media Measures**
TV Reach | Vary | Vary | N/A
Print Circulation | N/A | N/A | N/A
Digital Reach | N/A | N/A | N/A
Radio Reach | N/A | N/A | N/A
Out of Home Reach | N/A | N/A | N/A
TV Impressions | 6,616,522 | 6,616,522 | N/A
Print Impressions | N/A | N/A | N/A
Digital Impressions | 7,150,000 | 3,575,000 | 3,575,000
Radio Impressions | N/A | N/A | N/A
Out of Home Impressions | N/A | N/A | N/A
**Travel Trade Paid Media Measures**
Print Circulation | 480,000 | 240,000 | 240,000
Digital Reach | N/A | N/A | N/A
Digital Impressions | N/A | N/A | N/A
**Public Relations Measures**
No. of Media/PR Calls | 120 | 60 | 60
No. of Press Releases Issued | 12 | 6 | 6
Print Publicity Value - Paid | $1,100,000 | $550,000 | $550,000
Broadcast Publicity Value - Paid | $100,000 | $50,000 | $50,000
Digital Publicity Value - Paid | $3,000,000 | $1,500,000 | $1,500,000
Print Impressions - Paid | 5,500,000 | 2,750,000 | 2,750,000
Digital Impressions - Paid | 12,000,000 | 6,000,000 | 6,000,000
Broadcast Impressions - Paid | 250,000 | 125,000 | 125,000
No. of Group Media FAMs | 1 | 0 | 1
No of Articles Generated from Group Media FAMs | 4 | 0 | 4
No of Individual Press Trips | 3 | 3 | 2
No of Articles Generated from Individual Press Trips | 5 | 2 | 3
**Social Media Metrics**
FACEBOOK
Total Impressions Gained | 156 | 78 | 78
Total Interactions Gained | 156 | 78 | 78
Total Fan Count | 156 | 78 | 78
Increase in Fans | 156 | 78 | 78
INSTAGRAM
Total Impressions Gained | 156 | 78 | 78
Total Interactions Gained | 156 | 78 | 78
Total Fan Count | 156 | 78 | 78
Increase in Fans | 156 | 78 | 78
TWITTER
Total Impressions Gained | 156 | 78 | 78
Total Interactions Gained | 156 | 78 | 78
Total Fan Count | 156 | 78 | 78
Increase in Fans | 156 | 78 | 78
**DMAP Measures**
No. of DMAP Action Items Supported | 24 | 12 | 12
No. of Initiatives to Promote Hawai‘i Made Products | 12 | 6 | 6
No. of Hawai‘i Festivals & Events Promoted | 12 | 6 | 6
No. of Voluntourism Programs Promoted | 6 | 3 | 3

### Annual Target | Semi-Annual Targets
---|---
**Consumer Shows**
No. of Shows | 24 | 12 | 12
Show Attendance | 24 | 12 | 12
**Travel Trade**
No. of Meetings with Travel Trade Partners | 24 | 12 | 12
No. of Travel Trade Partners Met With | 24 | 12 | 12
No. of Trade Shows | 5 | 1 | 4
Trade Show Attendance | 600 | 100 | 500
No. of Trade Show Appointments | 300 | 100 | 200
No. of Travel Trade FAMs | 1 | 1 | 0
No. of Travel Trade FAM Participants | 8 | 8 | 0
No. of Trade Education Sessions | 8 | 2 | 6
No. of Trade Education Participants | 560 | 140 | 420
No. of Agents Completed Training Program | 100 | 50 | 50
**DMAP Measures**
No. of DMAP Action Items Supported | 24 | 12 | 12
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PARTNERSHIP OPPORTUNITIES
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<tr>
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<th>LOCATION</th>
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<tr>
<td><strong>TRADE SHOWS</strong></td>
<td></td>
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<tr>
<td>WestJet Shows</td>
<td>Fall 2022</td>
<td>HTCAN will have a booth at the trade shows in the largest cities</td>
<td>Calgary, Vancouver, Toronto</td>
<td>USD$350 per show</td>
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<tr>
<td><strong>TRADE FAMILIARIZATION TRIPS (FAMS)</strong></td>
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<tr>
<td>Product Manager FAM</td>
<td>Sept 2022</td>
<td>8 product managers will visit the Hawaiian Islands to experience firsthand the Hawaiian culture and have a different approach to the traditional Hawai‘i product</td>
<td>2 Islands TBD</td>
<td>Complimentary nights, meals, activities, air seats</td>
</tr>
</tbody>
</table>
## PARTNERSHIP OPPORTUNITIES

<table>
<thead>
<tr>
<th>ACTIVITY</th>
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<th>DESCRIPTION PUBLIC RELATIONS</th>
<th>LOCATION</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Group Media FAM</td>
<td>Summer/Early Fall 2022 (tentative)</td>
<td>4 high-profile media + 1 VoX escort fam trip to 2 islands (TBD)</td>
<td>2 islands (TBD)</td>
<td>Comp room nights and meals, air seats</td>
</tr>
<tr>
<td>Aloha Canada Media Mission</td>
<td>Spring 2022 (tentative)</td>
<td>Host 15-20 top tier media at evening cocktail receptions in 3 key markets – Toronto, Montreal &amp; Vancouver</td>
<td>Toronto, Montreal, Vancouver</td>
<td>USD$1,000</td>
</tr>
<tr>
<td>Individual Media FAMs</td>
<td>Throughout 2022</td>
<td>High-profile individual journalists targeted and vetted by HTCAN</td>
<td>All Islands</td>
<td>Comp room nights, meals and activities, air seats, car rental</td>
</tr>
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## CONSUMER PROMOTIONS

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<td>Today’s Bride Magazine</td>
<td>Apr 2022</td>
<td>Consumer contest to win a Honeymoon trip</td>
<td>All islands</td>
<td>Comp room nights, meals and activities, air seats, car rental</td>
</tr>
</tbody>
</table>
MAHALO!
THANK YOU!
MERCI !