

The background of the entire page is a close-up photograph of several traditional Hawaiian leis. On the left, there is a lei made of green leaves. In the center, there is a lei made of small, light purple flowers. To the right of that is a lei made of bright yellow-orange flowers. On the far right, there is a lei made of orange and red flower buds. The leis are hanging vertically, and the background is a soft, out-of-focus green.

2026 BRAND MARKETING PLAN – Canada Market

2025 ACTIVITIES





MARKET SITUATION

CANADIAN MARKET CONDITIONS

Things are still tariffic!

Trade conflict
with U.S. and
political friction

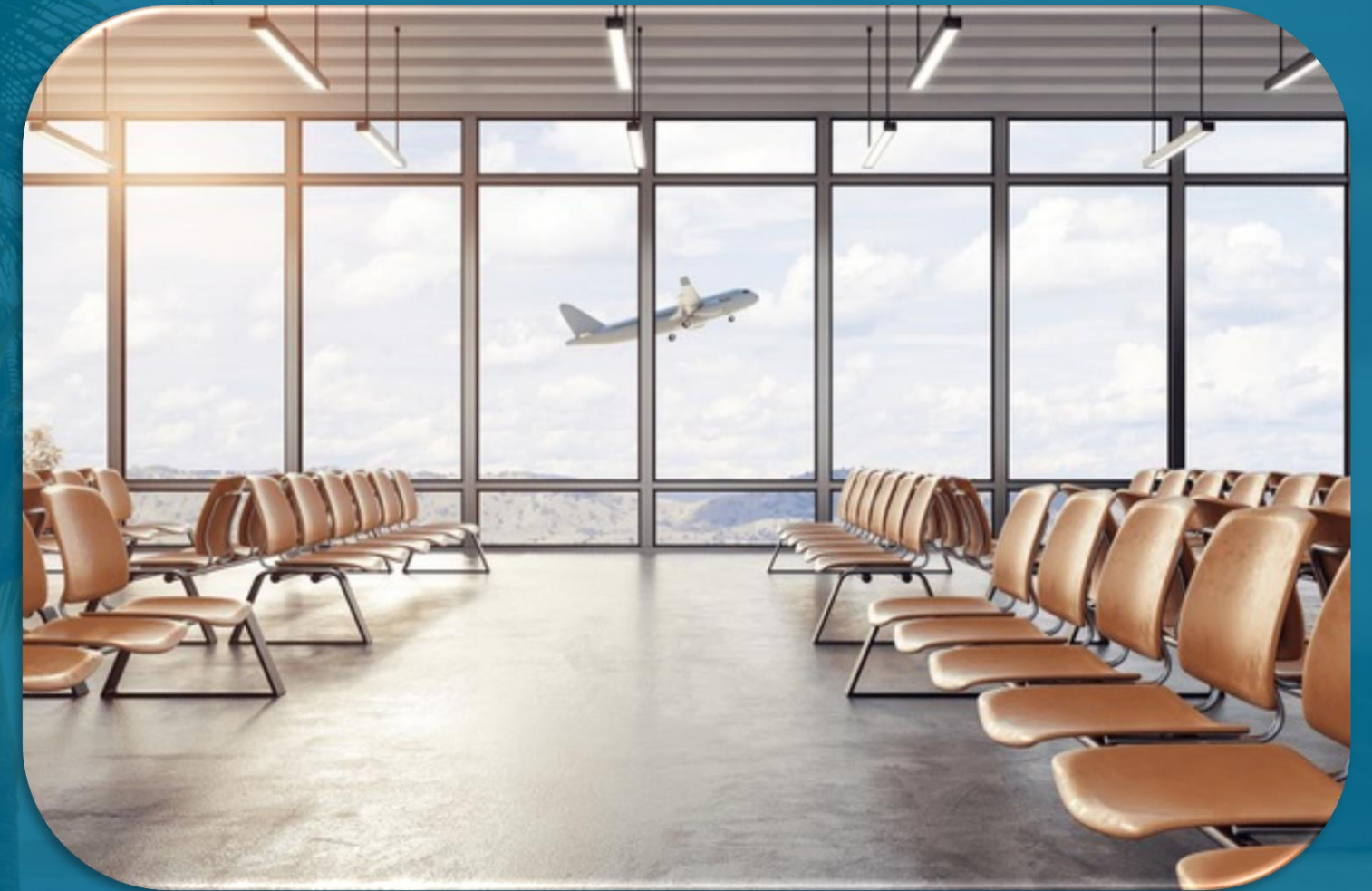
1 Canadian Dollar
worth \$0.72 U.S.
(\$0.77 in 2023,
trending upwards
from \$0.69 in March)

Consumer
confidence is
dipping

Slight increase
in
unemployment

CANADIAN MARKET CONDITIONS

- ❖ U.S. overnight visitation by Canadians is down 17.7% YOY*
- ❖ Hawai'i down 9.4%**
- ❖ Sentiment towards U.S. travel is not favorable currently, but will improve considerably when a trade deal is reached



**Conference Board of Canada Jan - June 2025 Outbound Report Data*

*** HTA July Data*

CANADIAN MARKET CONDITIONS

- ❖ Is this a boycott?
- ❖ No! Canadians are still traveling to the U.S. and Canada is still the #1 market
- ❖ Hawai'i performing considerably better than continental U.S.
- ❖ Canadians traveling extensively internationally, up 6.6% YOY*



*Conference Board of Canada Jan - June 2025 Outbound Report Data

COMPETITIVE ENVIRONMENT

Top Destinations for Canadian Travel

Jan – June 2025

INTERNATIONAL		
COUNTRY	ARRIVALS	YOY CHANGE
Italy	550,000	+1.7%
France	520,000	+5.8%
UK	510,000	+9.3%
Japan	335,000	+23.2%
Portugal	331,000	+6.7%
Spain	281,000	+4.5%

WINTER ESCAPE		
COUNTRY	ARRIVALS	YOY CHANGE
Mexico	1,680,000	+11.8%
Dominican Republic	692,000	-5.0%
Cuba	428,000	-25.9%
Jamaica	219,000	-2.9%
Costa Rica	165,000	-4.8%

USA		
DESTINATION	ARRIVALS	YOY CHANGE
Orlando	475,000	-4.9%
Los Angeles	474,000	-15.1%
Fort Lauderdale	465,000	-1.4%
San Francisco	422,000	-1.3%
Las Vegas	395,000	-17.9%
Hawai'i (10 th)	188,000	-6.9%

OVERALL
Asia & Oceania +12.9%
Domestic (within Canada) +10%
Europe & UK +6.5%
Caribbean, Mexico, Central America - flat

KEY CANADIAN STATS

January to July 2025

- ❖ Canada is Hawai'i's second largest international market: 245k visitors
- ❖ Average length of stay: 11.36 days
- ❖ Visitor Expenditure: \$635M (#1 Intl Market)
- ❖ Per Person Per Trip: \$2,590
- ❖ First Time Visitors: 33.9%
- ❖ Leisure: 91%



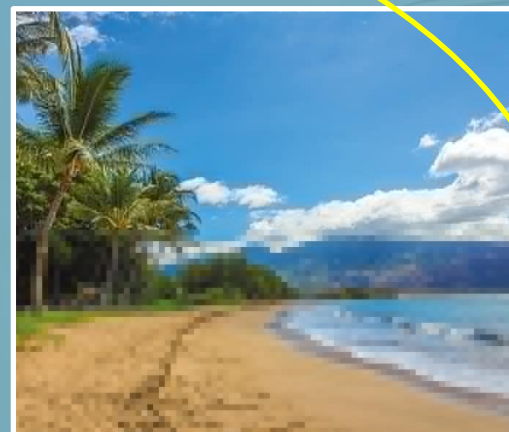
*HTA July 2025 Data

KEY CANADIAN STATS

January to July 2025 – by island



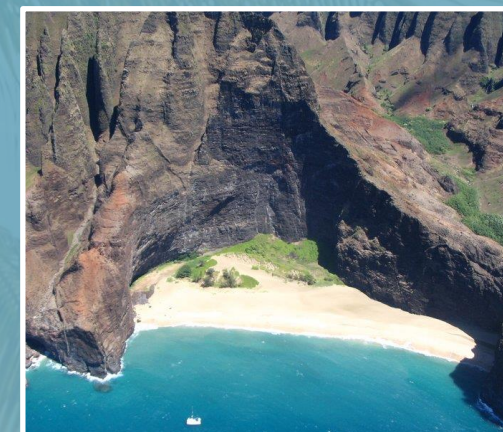
O'ahu 140k



Maui County
91k



Island of
Hawai'i 43k



Kaua'i 25k

Average
Age: 48

Average
Party
Size: 2.4

*HTA July 2025 Data

COMMENTS FROM PARTNERS

“Our Canadian clients view Hawai‘i differently than they do the continental U.S. If they are hesitating about a U.S. trip currently, many still feel fine about booking Hawai‘i.”

“We anticipate a return to historical U.S. booking patterns more quickly if a trade deal is signed, but slower if the trade conflict is long term.”

“We haven’t reduced our capacity or product offerings. We anticipate a rebound.”

“Hawai‘i is too special and unique to be replaced by other destinations for our clients.”

**FLIGHT
CENTRE™**



WESTJET 

 **Expedia**



REMAINDER OF 2025 – LARGER INITIATIVES

Travel Trade FAM

- ❖ AMA Travel Advisors - 7
- ❖ O'ahu & Maui Oct 25 - 31

Group Media FAM

- ❖ Romance Travel theme - 4 journalists
- ❖ O'ahu & Kaua'i Oct 16 - 23

Consumer Direct Media

- ❖ National Digital & Social executions

Media & Trade Event

- ❖ Montreal Dec 1
- ❖ Cirque du Soleil 'Auana & OUTRIGGER as partners



Aloha Canada Sales Mission

- ❖ Toronto, Edmonton, Vancouver – Dec 2 - 5
- ❖ Media Event Toronto
- ❖ 12 partners attending



2026 CANADIAN VISITOR PROJECTIONS

400,000
Visitor
Arrivals, a
0.7%
increase from
2025

4.5M Visitor
Days, a 1.6%
increase

\$1.05B in
Visitor
Spending, a
3.7%
increase*

While there is uncertainty related to political and trade friction, HTCAN is optimistic and aligned with these projections. Here's how it will be accomplished.

- ❖ Fresh Thinking
- ❖ New Programs
- ❖ Strategic Positioning

And now...

A tropical beach scene with palm trees, rocks, and the ocean under a cloudy sky. The text "2026 BRAND MARKETING PLAN" is overlaid in white, bold, sans-serif font.

2026 BRAND MARKETING PLAN

HAWAI'I TOURISM CANADA TEAM



Susan Webb

Country Director,
President VoX
International



Colin Wood

Account Director



Erin Oddleifson

Director of
Marketing
& Client Services



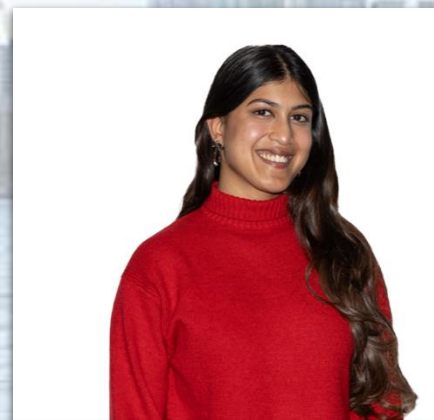
Samantha Carreira

Public Relations
Account Manager



Rita Spizzirri

Marketing
Production
Manager



Anchita Singla

Social Media
Support



Karen-Ann Zoschke

Accounting
Manager



Lana Lubon

Events Manager



Faye Tierney

Account Services



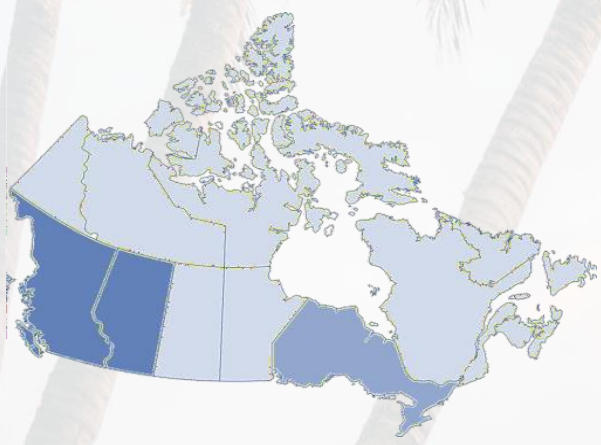
Gustavo Inciarte

Account Manager
Western Canada



Carla D'Andrea

Account Manager
Eastern Canada



2026 TARGET AUDIENCE



Affluent Travelers

- ❖ Offering a greater likelihood of higher in-destination spend, longer trip duration, multi-island travel and repeat visits
- ❖ Less sensitive to price, currency fluctuations, etc.
- ❖ Household annual income over \$100K USD



Active Travelers / Experience Seekers

- ❖ Value physical and unique exploration focused experiences that incorporate culture and history



Snowbirds / Retirees

- ❖ Long duration visitors who live like locals

70% of visits come from British Columbia & Alberta, but Ontario over indexes with 36% of the desired audience

CANADIAN TRAVEL TRENDS

- ❖ Prioritizing experience-driven vacations
- ❖ Fewer, longer vacations
- ❖ Value-seeking, but not afraid to spend
- ❖ Solo travel, self-fulfillment, and sustainable

Hawai'i's Resonating Strengths

- ❖ The Aloha Spirit (feeling welcomed)
- ❖ History & Culture
- ❖ In-destination Safety
- ❖ Unique Experiences
- ❖ Kuleana & Mālama





2026 STRATEGIES & TACTICS

CONSUMER DIRECT STRATEGY

Continue to reinforce Hawai'i as...

- ❖ Welcoming – as a contrast to current perceptions about the continental U.S.
- ❖ Beautiful, relaxing, safe
- ❖ Incredible and unique experiences

Utilizing...

- ❖ Mālama, Kuleana & Ho'okipa messaging
- ❖ People, Place, Culture resources, with an emphasis on video
- ❖ A strategic mix of on and offline tactics



CONSUMER DIRECT STRATEGY

With an objective of inspiring mindful travel while preparing visitors for...

- ❖ Safe and responsible travel
- ❖ Caring for and respecting Hawai'i's culture, people, environment
- ❖ Supporting and shopping at local businesses

AI Support

HTCAN will support global AI strategy by maximizing Canadian content that contributes to responses to traveler questions about Hawai'i.

- ❖ Canadian content on gohawaii.com/ca



CONSUMER DIRECT TACTICS

TV Integration

- ❖ **New** multi-platform custom content-driven campaign with Bell and Bloomberg Media targeting affluent travelers
- ❖ Social amplification and online video extensions

Social Media

- ❖ **New** TikTok and Pinterest tests
- ❖ Canadian Facebook & Instagram channels
- ❖ Organic and paid

Digital Campaigns

- ❖ Online Video
- ❖ Connected TV & Retargeting
- ❖ Search & Programmatic Display Advertising



CONSUMER DIRECT TACTICS

Co-operative Campaigns

- ❖ Collaborative win-win initiatives with key partners
- ❖ Strategic mix on and offline tactics utilizing paid and owned assets
- ❖ Cooperative 1:3 value
- ❖ Mindful traveler education incorporated as a condition of partnership



PUBLIC RELATIONS

New! Influencer Group FAM: Spring 2026

- ❖ Islands TBD
- ❖ Highlighting wellness, adventure, culinary and culture
- ❖ 2-3 influencers

Group Media FAM: Fall 2026

- ❖ Two islands - TBD
- ❖ Theme: Beyond the Bucket List: Hawai'i's Must-Sees & Hidden Treasures
- ❖ 4 journalists

Individual Media Visits: Year Round

- ❖ 2-3 individual media visits in 2026
- ❖ Islands TBD



Hawaï surfe sur la vague du tourisme régénératif

Malik Cocherel, Le Devoir
Collaboration spéciale
12 octobre 2024



Photo: Malik Cocherel La côte nord de l'île d'O'ahu

PUBLIC RELATIONS

TMAC Conference: Spring 2026

- ❖ Richmond, BC
- ❖ 24 one-on-one appointments with media from across Canada
- ❖ Additional networking opportunities

Discover America Media Day: Fall 2026

- ❖ Toronto, ON
- ❖ 10 one-on-one appointments with local media
- ❖ Networking opportunity at luncheon
- ❖ Opportunity to submit articles for award consideration (HTCAN won Best Consumer Article in 2023 and 2024)



PUBLIC RELATIONS

Broadcast Segments: Year Round

- ❖ Partner with on-air personalities to tell the story of Hawaii to their broadcast audiences

Media Partnerships: Year Round

- ❖ Collaborate with key media partners on a large scale digital and print campaign to increase visibility

Hawai'i brings the Aloha spirit to Toronto

By Ann Ruppenstein | October 24, 2024



TRAVEL TRADE ACTIVITY

1. Education / Training

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

- ❖ Destination Specialist and Brand USA Badge Programs
- ❖ Aloha Canada 2026
- ❖ Trade FAMs
- ❖ Partner Shows / Launches

2. Communications

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



A tropical beach scene with two palm trees in the foreground, their shadows cast on the sand. The ocean is visible in the background with gentle waves. The entire image has a blue color overlay.

MAJOR PROGRAMS 2026

MAJOR PROGRAMS 2026

New! TV Integration – Bloomberg & Bell Media

- ❖ National & Bilingual
- ❖ Multiplatform custom content-driven campaign utilizing editorial style video storytelling
- ❖ Six vignette series showcasing immersive experiences aligned with Mālama, Kuleana, Aloha themes
- ❖ Hosted by known on-air talent
- ❖ Social amplification and online video extensions

Anticipated Market Impact: Over 2.1M impressions to a desirable affluent target audience.



BellMedia

Bloomberg

MAJOR PROGRAMS 2026

New! Lei Day Activation

- ❖ British Columbia / Vancouver focused – May 1
- ❖ Generating friendship, affinity, education, and aloha
- ❖ Lei greetings for politicians
- ❖ Cultural practitioners from Hawai'i
- ❖ Local media engagement
- ❖ Consumer activation activity (school visit)
- ❖ Press outreach for story generation
- ❖ Social media buzz

Anticipated Market Impact: High visibility and significant PR exposure within desirable British Columbia market.



MAJOR PROGRAMS 2026

New! Influencer Group FAM: Spring 2026

- ❖ Islands TBD
- ❖ Aiming younger
- ❖ Highlighting wellness, adventure and promoting cultural connections

Group Media FAM: Fall 2026

- ❖ Islands TBD
- ❖ Theme: Beyond the Bucket list: Hawai'i's Must-Sees & Hidden Treasures

Travel Advisor FAM: Fall 2026

- ❖ Islands TBD
- ❖ Theme: Luxury Hawai'i
- ❖ Travel Media included for additional impact



Anticipated Market Impact:
Significant increased exposure to new audiences & advisor luxury product awareness.

MAJOR PROGRAMS 2026

Co-operative Campaigns – peak booking season

- ❖ Win-win campaigns that drive targeted audience response
- ❖ Air Canada, WestJet, Flight Centre, Costco Travel

Aloha Canada 2026

- ❖ Tentatively December – Toronto, Calgary Vancouver
- ❖ Travel Advisor education focused
- ❖ Media Events – Toronto & Vancouver
- ❖ Cultural component
- ❖ Hawai'i and Canadian co-op partners attending

Anticipated Market Impact: High visit conversion via key partners and trade inspiration to over 400 Travel Advisors.





PARTNERSHIP OPPORTUNITIES

PARTNERSHIP / INVOLVEMENT OPPORTUNITIES

Agent Focused Trade Shows

Aloha Canada 2026

Agent Focused FAMs

Webinar Support

Campaign Content Creation Support

Individual Press Trip Support

Group Media FAM Support

Quarterly Press Releases

Agent Communications

Contact HTCAN for details!





MAHALO!