

An aerial photograph of a lush, green mountain valley. The terrain is rugged and covered in dense vegetation. A river winds through the valley floor, and several smaller streams are visible on the slopes. The lighting suggests a bright, sunny day, with shadows cast across the mountain ridges.

HAWAII TOURISM

CANADA

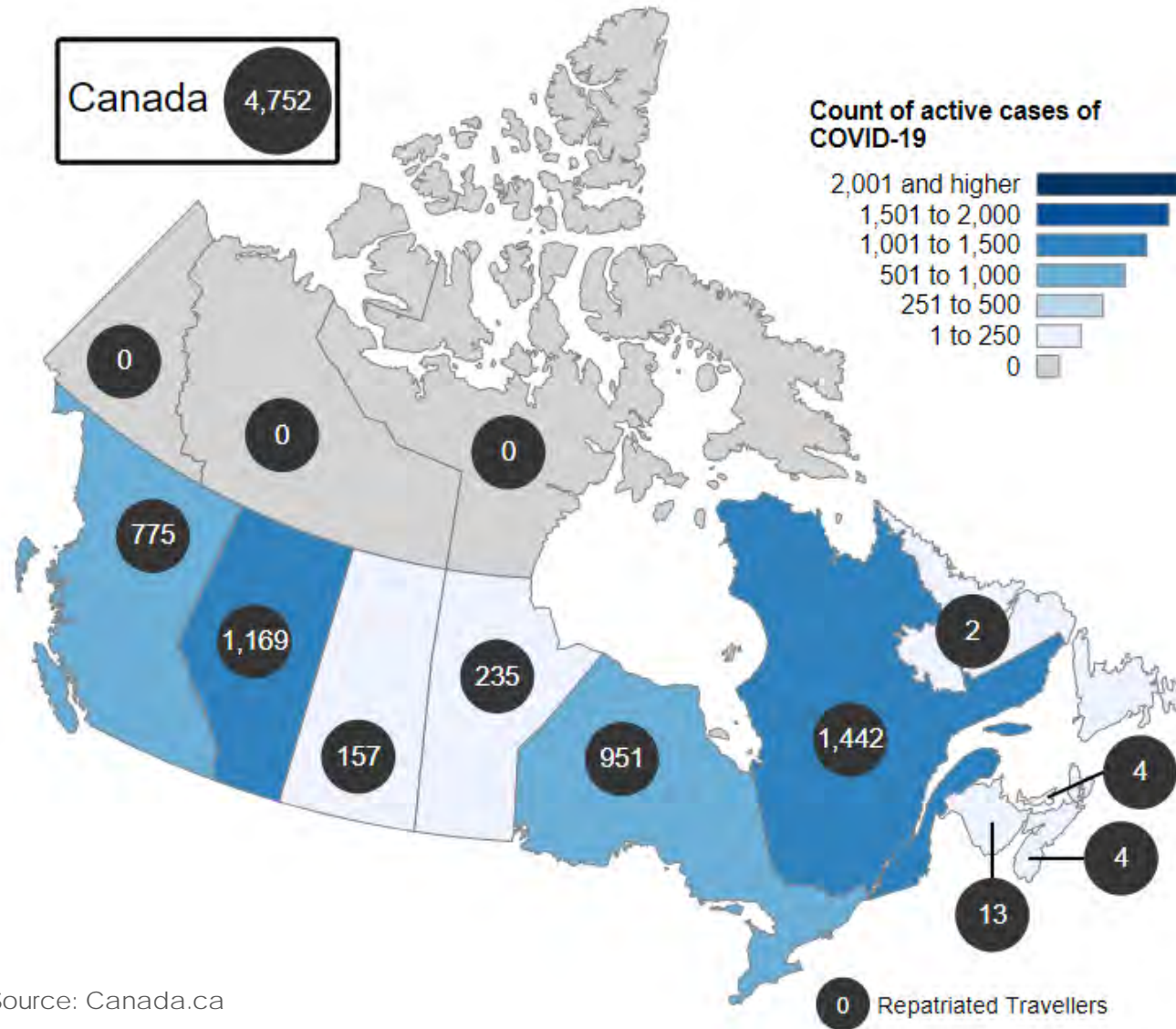
# HTA Marketing Committee Meeting

August 26, 2020

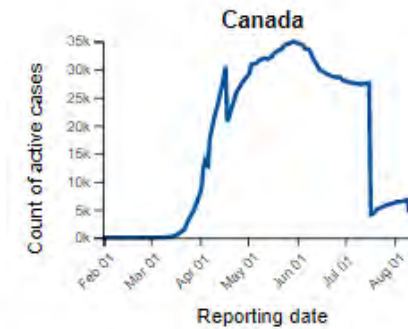


# Canada Overview

# COVID-19 Current Status



The count of active cases of COVID-19 in **Canada** was **4,752** as of August 18, 2020.



- All key market provinces (AB, BC, ON & QC) are in phase 3 out of 5 of the reopening process
- 9,000 deaths

# Economic Forecast

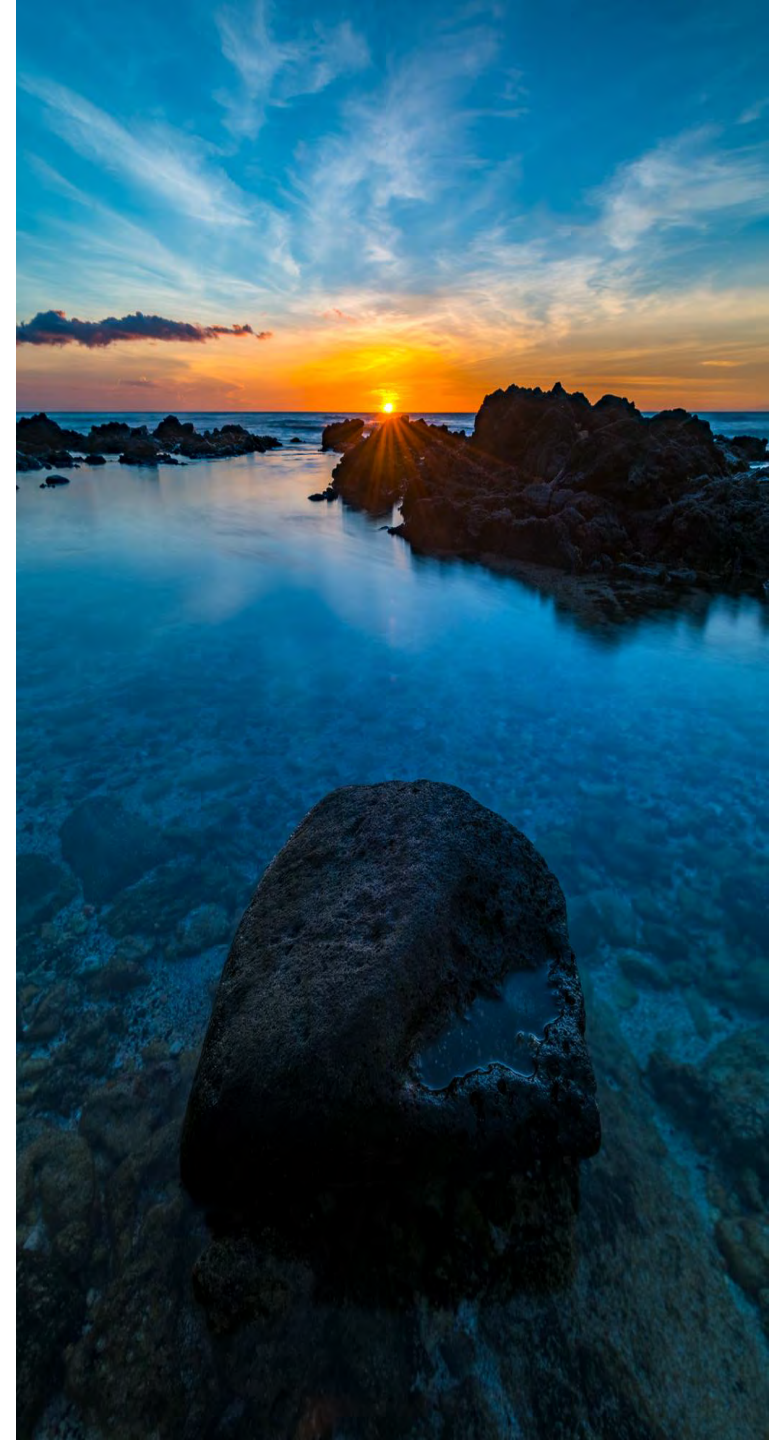
Economic Indicators	2020f	2021f	2022f	2023f
Real GDP, market prices (2012 \$) (% change)	-7.8%	6.7%	4.9%	1.8%
Real Disposable Income (2012 \$) (% change)	7.3%	-3.2%	1.5%	1.1%
Household Spending (2012 \$) (% change)	-10.3%	8.6%	5.3%	2.0%
CAD/USD	\$1.34	\$1.28	\$1.26	\$1.26

- Canadian federal government's fiscal response more than C\$300 billion or 14% of GDP
- The subsidy for receiving 75% of wages to remain until December
- Canadian Dollar has lost value averaging \$0.732 USD this year (-2.3%)
- Consumer confidence increased to 79.7, roughly 2/3 of the pre-pandemic level (120.6)
- The Bank of Canada's interest rate is 0.25%



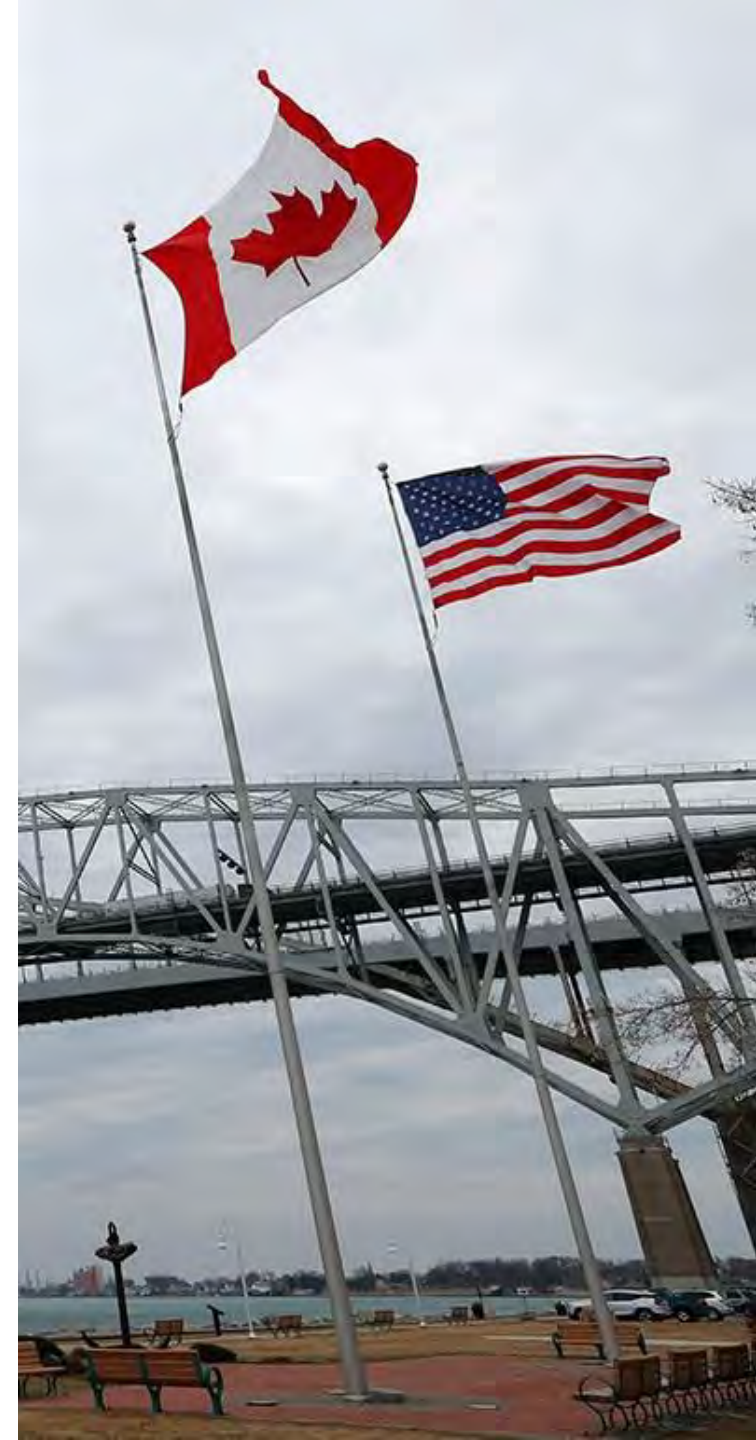
# Airline Update

- Air Canada plans to resume some flights depending on the Canadian-U.S. border policy; there are plans to start flying in early September depending on the pre-arrival testing policy measures
- No flights for August to Hawai'i
- Air Canada has announced a new partnership with Cleveland Clinic to develop biosafety measures across its operations (Clean & Safe program)
- WestJet announced 5 major U.S. destinations & 4 international destinations between July 16 - September 4:
  - Atlanta, Las Vegas, Los Angeles, New York (LaGuardia) & Orlando
  - Cancún, Montego-Bay, London (Gatwick), Paris
  - No flights to Hawai'i have been announced
  - 3,600 positions have been eliminated
- The Canadian Transportation Agency states airlines only have to offer passengers travel vouchers for cancelled flights due to COVID-19 pandemic, both the European Union & the U.S. have declared that — under their rules — passengers are entitled to refunds
- HTCAN is in constant communication with WS and AC executives for updates and collaboration on easing their comeback to Hawai'i



# Border & Travel Policy

- The U.S.-Canada border is to remain closed until September 21<sup>st</sup>, this period may be extended depending on the COVID-19 cases in the mainland USA
- Visitors to Canada (including residents) must quarantine for 14 days regardless of their origin
- Only people admitted into Canada are Canadian citizens, Canadian permanent residents, first degree relatives of the previous categories and essential workers
- Ottawa is encouraging Canadians not to travel abroad
- Two insurance companies are already covering COVID-related illnesses abroad; the rest of the insurance companies will cover these illnesses once Ottawa lifts the no-travel recommendation
- More than 30 countries currently accept or will soon accept Canadian tourists





# 2020 Recovery Plan

# Traveler Sentiment

- Canadians will be one of the first markets to return to traveling
- With physical distancing & social isolation taking a toll on multigenerational families being separated as a result of COVID-19; Canadians will be looking for ways to connect face-to-face more than ever
- Canadians will plan more road trips within Canada & across the border to the United States (when open)
- Canadian snowbirds that have homes & time shares in Hawai'i will be making their plans to travel back for the winter season (insurance available)





# Overview

## Refined Targeting & Objectives

- High-Value Travelers
- Increase multi-island visits
- Hawai'i Destination Specialist Program
- Increase MCI Planner Engagement & Product Awareness
- Repeat Visitors

## Pillars

- Branding
- Natural resources
- Hawaiian culture
- Community

## Messaging

- Communicate
  - purity of the environment,
  - the clean / pure air and water
  - wide open spaces
  - rejuvenation/healing place
  - Hawai'i as a safe destination
- Pre-arrival
  - Our resort areas are open, enjoy them
  - Importance of appropriate behavior when visiting our communities, while out in nature, and for our culture

# 2020 Recovery Activities

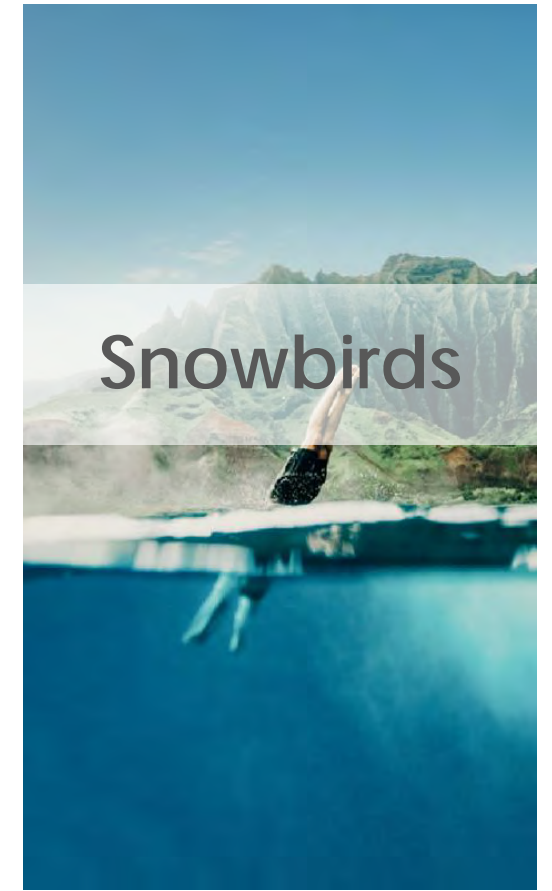
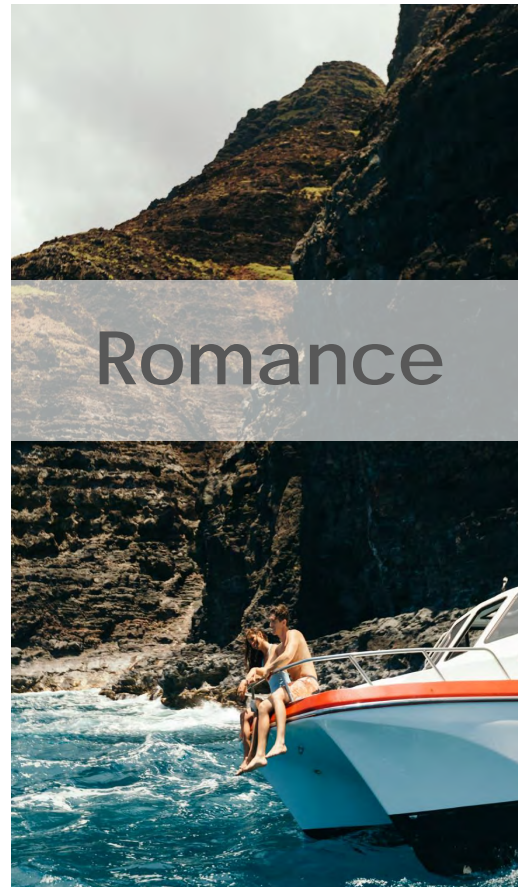
- Aloha Canada, November 17<sup>th</sup> or December 3<sup>rd</sup>
  - Trade show (up to 25 partners)
  - Webinars: Island Chapters, Hawaiian culture, Airlines
- Webinar campaign with Spoiled Agent (Sep-Dec)
- Quarterly newsletters (Kuleana/Rooted, news, COVID info, etc.)
- Constant communication with trade partners, MCI planners, Hawai'i partners
- Potential programs with strategic partners (Airlines, OTAs, Tour Operators, and large consortia partners)



An aerial photograph of a rugged, green mountain range with a coastline. The mountains are covered in dense vegetation and have a series of ridges and valleys. The ocean is a deep blue, and the coastline is visible with some white surf. The text "2021 BMP Overview" is overlaid in the center of the image.

# 2021 BMP Overview

# Target Audience



# Consumer Strategy

The media strategy for Hawai'i Tourism Canada will require the ability to pivot at a moments notice.

**Option 1:** Assume a second wave of COVID-19 (with no closings), but one that still is top of mind.

*Defensive Strategy:* Protect the core. Target past visitors (accounted for 64% of visitors in 2019), frequent visitors, and younger demographic (in the US this is the norm, but in Canada we tend to skew older). Focus spend on key areas (British Columbia and Ontario), tighten the duration of the campaign and use more performance-based tactics.

**Option 2:** Assume that COVID-19 is not front and centre in people's minds and that there are signs things are returning to normalcy. In this scenario, some elements of Option 1 should still be in place, but we widen the geographic footprint of the campaign, as well as expand the reach to inspire new travelers.



# Trade Strategy

- Educational
  - Aloha Canada (date TBC)
  - HDSP promotion to increase agent enrollment
  - Training webinars
  - Familiarization trip (10 agents, islands TBD)  
*\*suggested May for travel*
- Promotional
  - Trade publication campaign to promote HDSP
  - OTA or loyalty program campaign
  - Co-operative campaigns (ACV, WSV, Travel Brands) *\*requires additional funds*



# PR Strategy

## Thematic Pillars



Luxury – Spas, Resorts,  
Wellness, Cruises, etc.



Romance – Weddings,  
Honeymoons,  
Anniversaries, LGBTQ,  
etc.



History/Culture –  
Festivals & Events,  
Cuisine, Music, etc.



Outdoors / Nature –  
Volcanoes, Beaches,  
Rainforests, Sea Cliffs,  
etc.



Adventure/Recreation  
– Sport and Activity  
Participation and  
Events



Family –  
Multigenerational Trips,  
Reunions, etc.

