



# **2021 MARKET UPDATE**

**HTA BOARD MEETING  
5.27.2021**

Susan Webb  
President



# MARKET CONDITIONS

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HAWAII TOURISM™  
CANADA

# MARKET CONDITIONS

## GENERAL ECONOMY

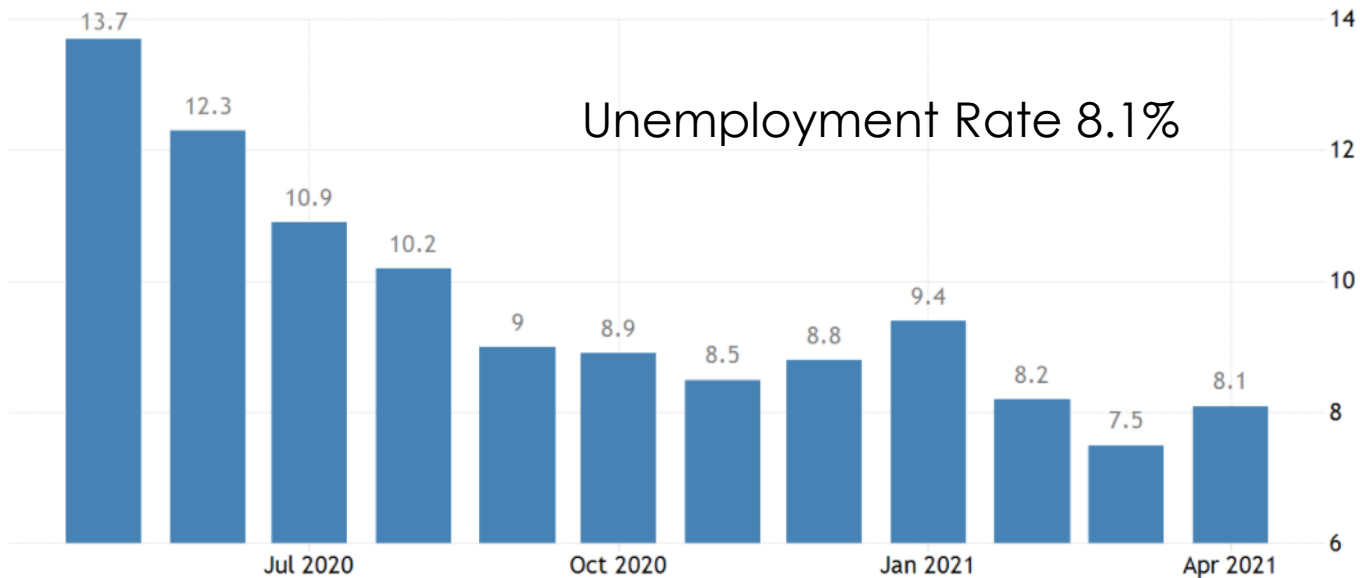
Economic Indicators	2020p	2021f	2022f	2023f
Real GDP, market prices (2012 \$) (% change)	-5.3%	5.4%	4.0%	1.3%
Personal Disposable Income (2012 \$) (% change)	8.0%	-2.6%	1.0%	1.8%
Household Spending (2012 \$) (% change)	-6.4%	4.6%	5.2%	2.5%
CAD/USD	\$1.34	\$1.30	\$1.28	\$1.26

- Canadian federal government's fiscal response + C\$407 billion or 18.5% of GDP
- Canadian Dollar very strong **USD\$0.82**
- Bank of Canada's interest rate 0.25%
- Extremely high fiscal deficit



# MARKET CONDITIONS

## GENERAL ECONOMY

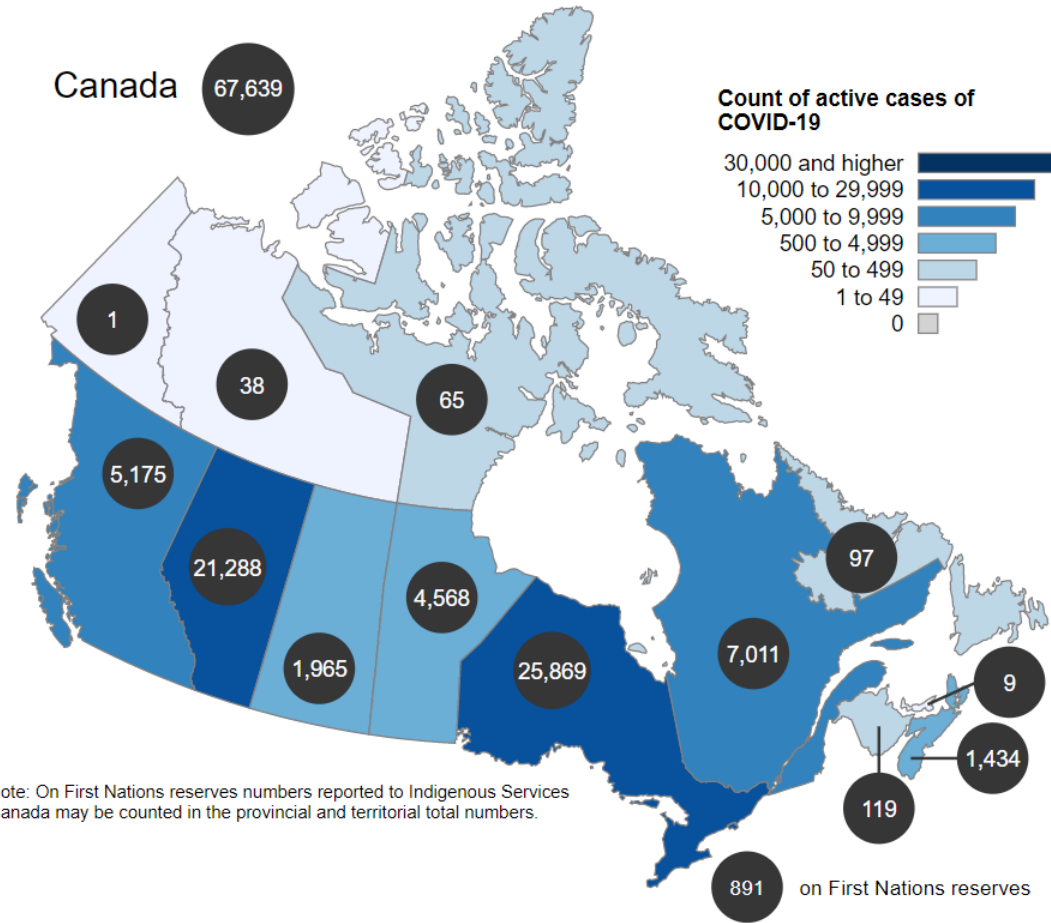


SOURCE: TRADINGECONOMICS.COM | STATISTICS CANADA

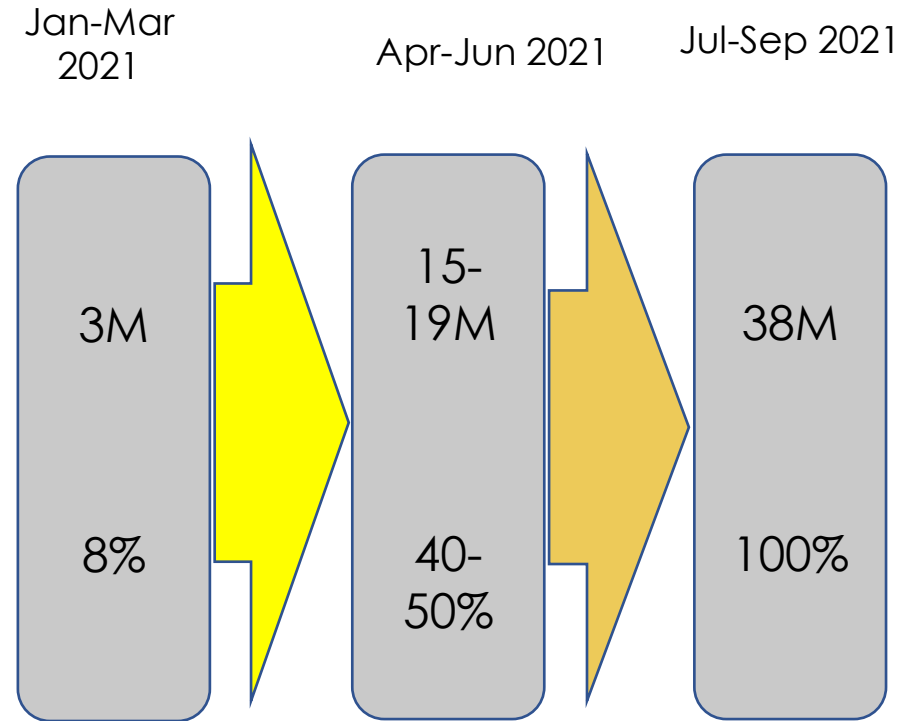
- Consumer confidence increased to 98.4, more than 80% of pre-pandemic level (120.6)
- Wage subsidy program extended to September (November) 2021

# MARKET CONDITIONS

## ACTIVE COVID-19 CASES



## Canada's COVID-19 Immunization Timeline



Information is based on regulatory approval and anticipated delivery schedules of vaccine supply  
Source: Health Canada

# MARKET CONDITIONS

## TRAVEL RESTRICTIONS

### **Inbound restrictions:**

- Air Travel:
  - Essential Travel only
  - Pre-boarding PCR test
  - Test at landing + 3-day hotel quarantine (4 airports)
  - 11-day quarantine at home or federal facility
- **Sea Travel:** essential travel only
- **Land Travel:**
  - Essential Travel/returning Canadians
  - 14-day quarantine/PCR test

### **Outbound restrictions:**

- Essential travel only
- Only some insurance companies covering COVID related illnesses



# AIRLIFT



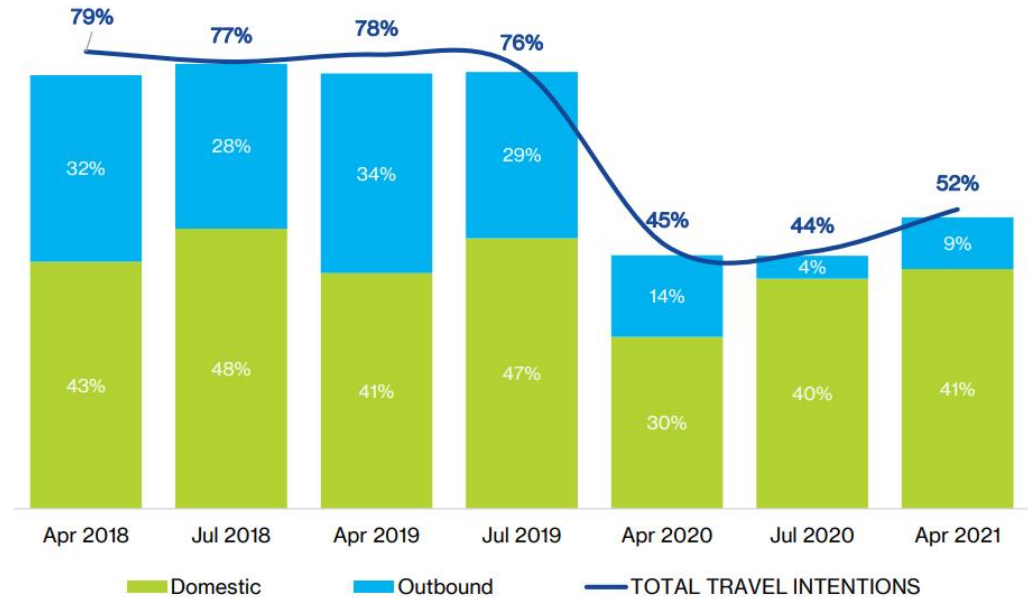
165.5K seats for the Winter 2021/2022

- **Resumes September:**
  - YVR-HNL
  - YVR-OGG
- **Resumes December:**
  - YVR-KOA
  - YYZ-HNL
  - YYC-OGG
- **New routes: NON STOP FLIGHTS**
  - YYC-HNL
  - YYZ-OGG
  - YUL-HNL (Montreal)



- Planning month by month
- Stopped the service to Hawai'i on May 2<sup>nd</sup>

Summer Trip Intentions, by quarter



Source: CBoC quarterly travel intentions survey of Canadians 18+. Total includes trips with an unreported/unknown destination. April and July surveys reference overnight leisure travel activity occurring between May 1 – October 31, each year.

# MARKET CONDITIONS

## TRAVEL SENTIMENT

- Pent-up demand
- Flexibility in booking required
- Safety & health protocols (BUSA)
- Intentions (YouGov)
  - Friends & Family
  - Multi-generational
  - Beach Trip
  - Hike/walk holiday in countryside

## COMPETING DESTINATIONS' ACTIVITY

- Bermuda: paid social
- Jamaica: trade training webinars, consumer advertising, virtual events
- Cayman Islands: paid social and training webinars
- Visit Florida: training webinars, virtual events, consumer advertising
- Mexico: disengaged promotion from different destinations





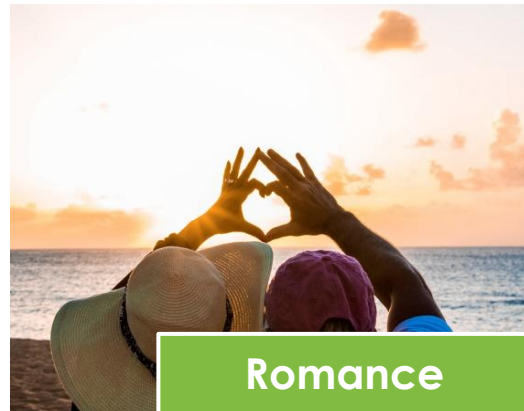
# TARGET AUDIENCE

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HAWAII TOURISM™  
CANADA

# TARGET AUDIENCE

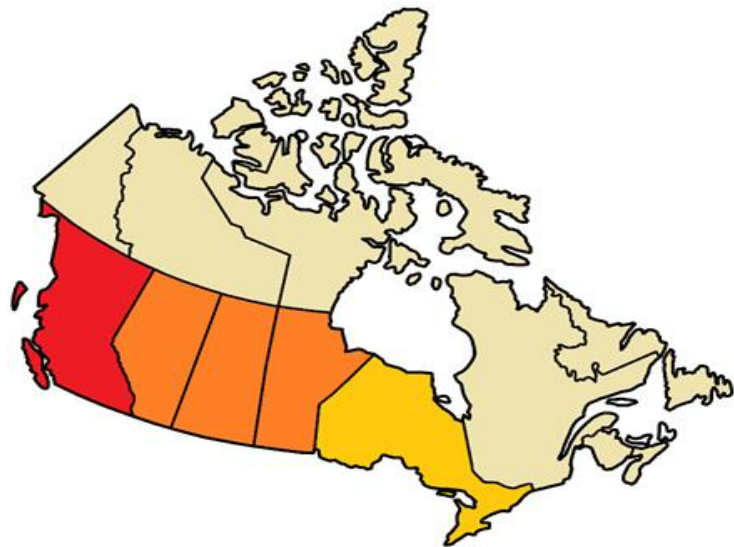
Mindful Travelers



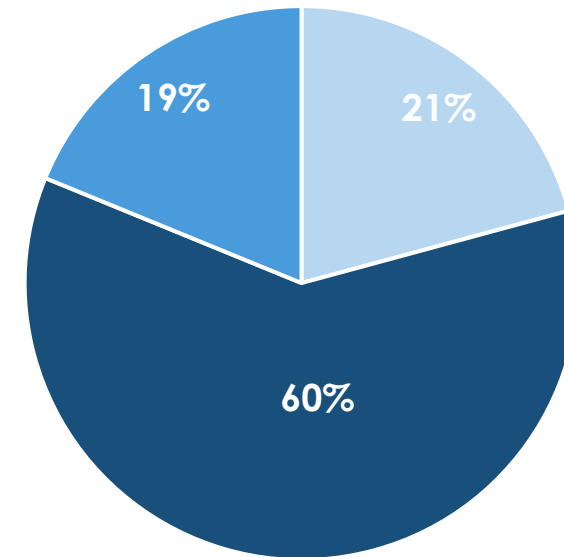
# TARGET AUDIENCE

## Priority Markets:

1. British Columbia (Vancouver)
2. Alberta (Calgary and Edmonton)
3. Ontario (Toronto)
4. Québec (Montreal)
5. Rest of Canada



■ 18-34 ■ 35-64 ■ 65+



Source: Numeris RTS Canada Spring '19

A diverse group of people, including a man, a young girl, a woman, an older woman, and another woman, are smiling and looking towards the camera. They are seated at a table outdoors, with a bowl of fruit and a glass of juice visible. The background is a soft-focus green landscape.

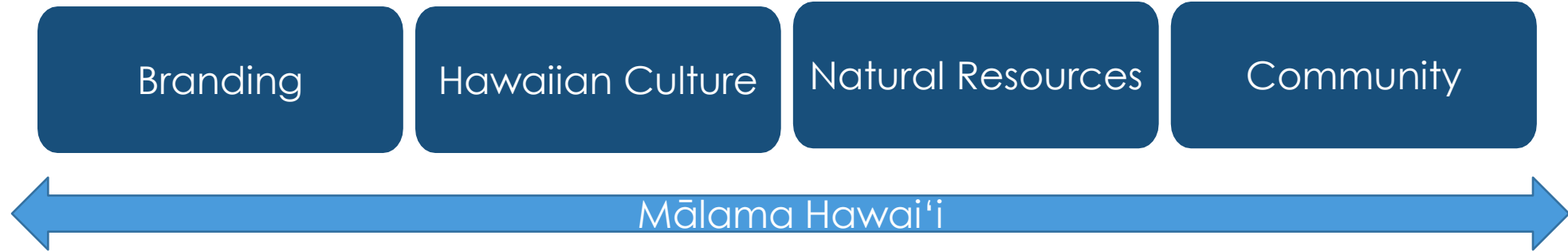
# CONSUMER STRATEGY

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# APPROACH



## **DIRECT TO CONSUMER**

Target the consumer to keep the Hawaiian Islands brand top of mind when looking for a destination that offers culture, beautiful beaches, safety and a diversity of activities. Ultimately, communicate to Canadian travelers that Hawai'i expects them to respect local communities, natural resources and to preserve the Hawaiian Islands essence and values.

## **PUBLIC RELATIONS**

Use relationships with consumer and travel writers as well as influencers in traditional, digital and social media outlets to showcase the Hawaiian Islands, their values and culture, to consumers in their articles, posts and blogs.

# CORE MESSAGING

Our strategy and actions are founded within the pillars of Branding, Community, Hawaiian Culture and Natural Resources promoting respect for the 'āina.



Mālama Hawai'i

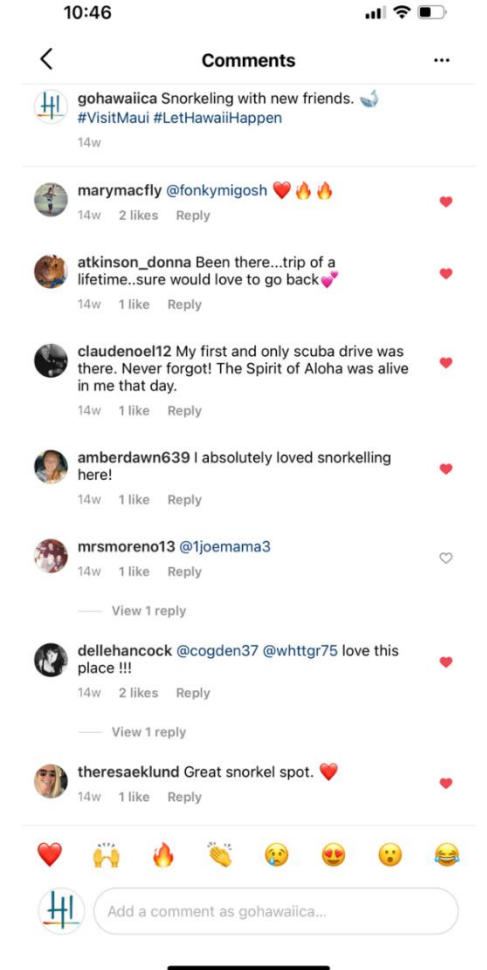
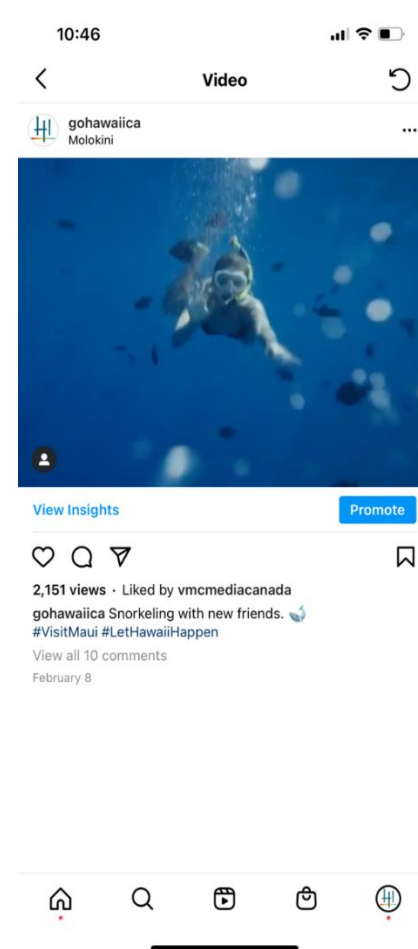
# MEDIA

Display

Video

Social

Continuous research  
Retargeting  
Programatic



# TACTICS

The following tactics will run via display and video and optimized towards performance.



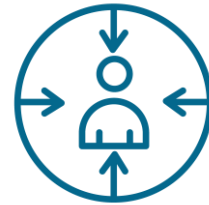
## AUDIENCE SEGMENT TARGETING

Reach prospective consumers that fall into our key pillars.



## KEYWORD TARGETING

Serve ads to consumers who are actively research luxury destinations.



## RETARGETING

Engage with consumers who have visited one of our webpages or clicked on an ad.



## ORGANIC AND PAID SOCIAL

Continuous feed in HTCAN social networks, organic and paid (budget permitting) to keep travelers engaged with the destination, encouraging responsible travel

Note: Retargeting would be 100% display – no video.



# PROMOTIONAL CAMPAIGNS



New route promotion targeting frequent travelers by age. In-flight videos, AC media. Inaugural events



Mālama Hawai'i packages, inclusion of educative video with confirmation



Kuleana videos at warehouses promoting respect with travel campaign

## *Zoomer Radio*

Radio campaign targeting Baby Boomers: How would you travel "green" to Hawai'i? (depending on partners)



# PROMOTIONAL CAMPAIGNS

— *MĀLAMA* —  
HAWAII'Ī

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# PUBLIC RELATIONS

- Proactive pitching
- Themes:
  - Responsible tourism
  - Family travel
  - Culture, Art and History
  - Culinary
  - Adventure /Outdoor Activities

CoastReporter

## Island sea life: Kona's coastal wow

Feb 9, 2020 6:00 AM By: Rick Millikan



*The green turtle is native to Hawaii. | Pacific Whale Watch Organization Photo*

Sea life is one of Kona's big attractions.

A Body Glove cruise even guarantees dolphin sightings! And after munching continental breakfasts, we encounter an entertaining pod of these friendly critters. Cruises like this also facilitate snorkeling. Anchoring in a peaceful cove, crewmen distribute snorkeling gear, including prescription-lensed masks. One fellow presents helpful instructions and safety tips.

Plunging into crystal waters, keeners like me start identifying the colourful fish. Descriptive names make it easy. Convict tangs wear black-and-white stripes. Sergeant fish have black-and-yellow bands.

<https://www.coastreporter.net/in-the-community/island-sea-life-konas-coastal-wow-3414721>

1/3

NUVO



Kuleana: Thinking About Sustainable Business and Tourism on Hawaii

Cultural responsibility.

Writer Sabrina Pirillo



There is a fundamental word in Hawaiian used to define responsibility: *kuleana*—a deep

# PUBLIC RELATIONS

CANADIAN  
Geographic

NATIONAL POST

CORUS.  
MÉDIA

Canadian  
TRAVEL PRESS  
CANADA'S MOST TRUSTED TRAVEL TRADE PUBLICATION SINCE 1948

THE  
GLOBE  
AND  
MAIL

LA  
PRESSE

CAA  
MAGAZINE

AIR CANADA  
enRoute

pax GLOBAL  
MEDIA

DREAMSCAPES  
TRAVEL AND LIFESTYLE MAGAZINE

WESTJET MAGAZINE

TRAVEL  
PULSE

TORONTO STAR

LE JOURNAL  
DE QUÉBEC

LE JOURNAL DES VOYAGES  
Tourisme  
PLUS

POSTMEDIA

TODAY'S  
bride

MY PASSION MEDIA

WL | WESTERN LIVING  
MAGAZINE

HOMOCULTURE  
We know gay culture. You should too. WWW.THEHOMOCULTURE.COM

HAWAII TOURISM  
CANADA

- Individual Press Trips: Air Canada direct routes
- Top tier journalists Toronto, Montreal, Vancouver and Calgary (bilingual)
- All itineraries will promote responsible tourism
- Themes:
  - Family Travel
  - Hawaiian Culture
  - Outdoor/Adventure
  - Hawaiian Cuisine



# TRADE STRATEGY

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# TRADE STRATEGY

## Education

- Webinars (En/Fr)
- Newsletters
- Emphasis on Mālama



- Hawai'i Destination Specialist Program  
Travel trade campaign



**HTCAN has been developing trade & consumer initiatives which no cost**

**Continuous communication with agents and tour operators**

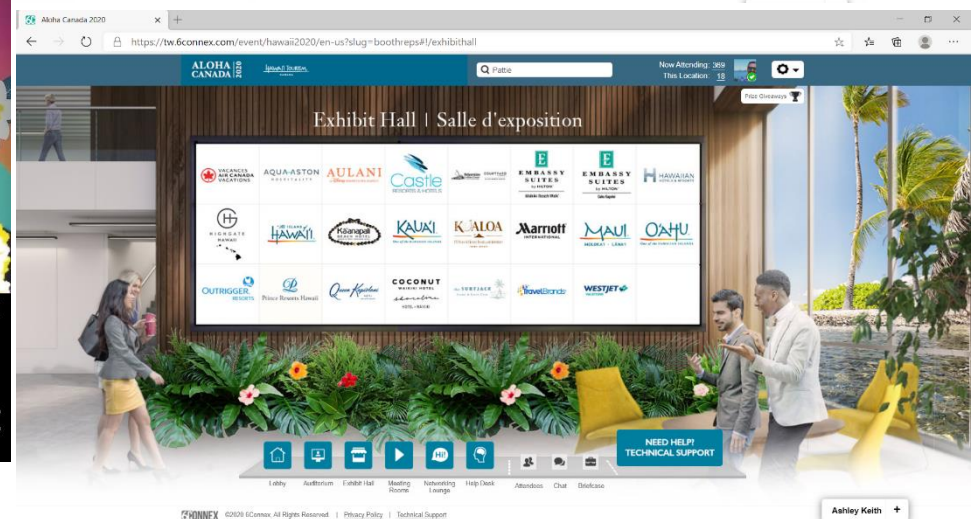
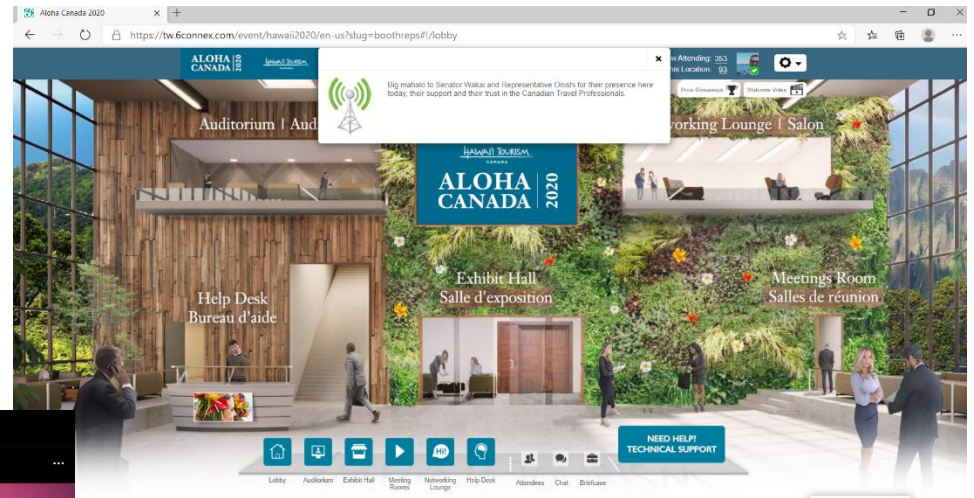
## Trade shows

- WestJet Expo (tentative Fall)
- TravelBrands Agent appreciation (tentative late Summer)
- ACV Product Launches (tentative late Summer)
- Discover America Canada Fall event (TBA)

# TRADE STRATEGY

## Aloha Canada virtual (October 28)

- 20+ partners
- Hawaiian agent producers
- Island Chapters
- NaHHA partnership
- Cultural webinars
- Product webinars
- Trade show
- Prizes
- Gifts
- Media appointments
- MCI event



# TRADE STRATEGY

## Tour Operators:

- Co-op campaigns
- Product Launches
- Training
- Sustainable approach/market



Pending Campaigns

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New Approaches & Partners

HTCAN is promoting the usage of the digital marketing material and all promotional items are sustainable



Intrepid Group





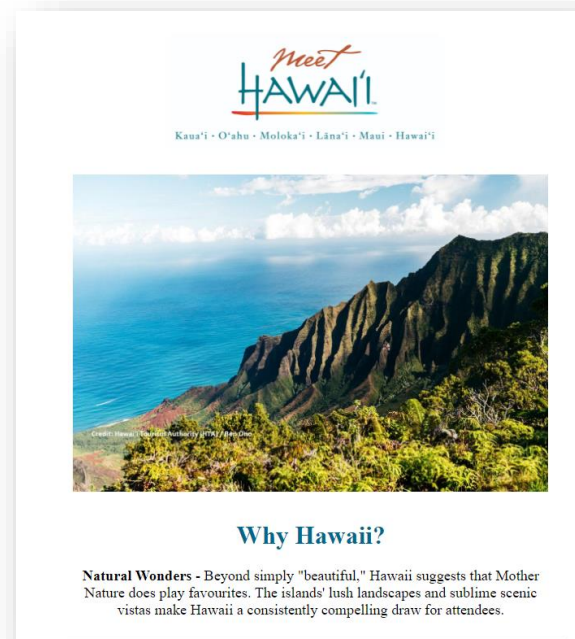


**MCI**

**HAWAII TOURISM**  
CANADA

# MCI

- Spring/Summer & Fall/Winter newsletter
- Development of Mālama Tool Kit for groups
- Hawaii in demand for 2022 +



## Confirmed:

- Sep 2021, 133 room nights Maui. Home Equity
- April 2022, 200-250 pax, Maui. Essential Meetings (auto parts)

## Tentative:

- Oct 2021, 105 pax, Maui, 420 rm nights
  - Shaw Communications. (on hold for now – Covid)
- Oct 2021, 50 pax, Maui 100 rm nights
  - LGA Airport (Canadian planner) (on hold for now – Covid)
- Mar 2022, 120 pax, Maui & Hawai'i Island, 288 rm nights
- Mar 2022, 200 pax, Maui, Oahu & Hawaii Island, 800 rm nights
- May 2022, 90 pax, Oahu, 45 rm nights (sleeping rooms only)
- Nov 2022, 284 pax, Oahu, 142 rm nights (sleeping rooms only)
- Feb 2022, 130 pax, Maui, 347 rm nights

# REGENERATIVE TOURISM / DMAP INITIATIVES

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# REGENERATIVE TOURISM/DMAP INITIATIVES

## RESPECT OUR 'ĀINA

HTCAN will include the Kuleana and Mālama videos in every communication and the educative material developed for the DMAPs, creating awareness of the importance of the respect of the land.



# REGENERATIVE TOURISM/DMAP INITIATIVES

## RESPECT OUR HAWAIIAN CULTURE

HTCAN will include cultural webinars in all the training activities (Trade/MCI), organize media events and post on social to sensitize the Canadian market to the Hawaiian culture and history, and deeply explaining concepts like mālama, ho'okipa, aloha to create cultural ambassadors.



# REGENERATIVE TOURISM/DMAP INITIATIVES

## RESPECT OUR ENVIRONMENT, NATURAL RESOURCES AND ENDANGERED SPECIES

HTCAN will include cultural webinars in all the training activities (Trade/MCI), organize media events and post on social to sensitize the Canadian market to the Hawaiian culture and history, and deeply explaining concepts like mālama, ho'okipa, and aloha to create cultural ambassadors.

Work with the Conservation Council for Hawai'i to promote their donation program.



# REGENERATIVE TOURISM/DMAP INITIATIVES

## RESPECT OUR RESPECT AND ENGAGE WITH OUR RESIDENTS

HTCAN will include cultural webinars in all the training activities (Trade/MCI), organize media events and post on social to sensitize the Canadian market to the Hawaiian culture and history, and deeply explaining concepts like mālama, ho'okipa, aloha to create cultural ambassadors.



# REGENERATIVE TOURISM/DMAP INITIATIVES

## ADHERE TO HAWAI'I SAFETY PROTOCOLS

HTCAN will work with the Canadian travel trade and media to have them promote the importance of respecting the safety protocols.

HTCAN will partner up with the Canadian carriers to show the Mālama Hawai'i videos in all their inbound flights.





# REGENERATIVE TOURISM/DMAP INITIATIVES

## PROMOTE LOCAL BUSINESSES AND HAWAI'I MADE PRODUCTS

Include Hawai'i producers in our training and media out reach to have people familiarized with Hawai'i made products and the importance of consuming local.

Promote this to all MCI planners for their groups coming to Hawaii as well as promotional items purchased in advance.

