



## Canada Fact Sheet

### Canada Overview

Canada is the second largest international market and fourth largest source market overall for visitors to Hawai'i. A slowdown in the Canadian economy and a weakened Canadian dollar have impacted the booking pace for the Hawaiian Islands. HTA works with VoX International, its marketing contractor for Canada, to stimulate demand and retain market share while targeting key segments.

### January 2020 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$160.4 million
Primary Purpose of Stay:	Pleasure (61,243) vs. MCI (3,044)
Average Length of Stay:	14.03 days
First Time Visitors:	29.8%
Repeat Visitors:	70.2%

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	1,108.5	1,073.5	-3.2%	NA	NA	160.4	167.6	-4.3%
Visitor Days	6,743,492	6,493,083	-3.7%	NA	NA	913,550	976,857	-6.5%
Arrivals	548,702	535,267	-2.4%	NA	NA	65,123	68,462	-4.9%
Per Person Per Day Spending* (\$)	164.4	165.3	0.6%	NA	NA	175.6	171.6	2.3%
Per Person Per Trip Spending* (\$)	2,020.3	2,005.6	-0.7%	NA	NA	2,462.8	2,448.2	0.6%
Length of Stay (days)	12.29	12.13	-1.3%	NA	NA	14.03	14.27	-1.7%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

### Contact Information

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<sup>1</sup> 2020 and 2019 visitor data are preliminary. 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

In 2019, spending by Canadian visitors dropped 3.2 percent to \$1.07 billion. Visitor arrivals (-2.4% to 535,267) and visitor days (-3.7%) decreased while daily visitor spending (+0.6% to \$165 per person) was slightly higher compared 2018. In January 2020, visitor spending dropped 4.3 percent to \$160.4 million. Visitor arrivals (-4.9% to 65,123) and visitor days (-6.5%) decreased while daily visitor spending (+2.3% to \$176 per person) was higher compared to a year ago.

Airlift: In 2019, scheduled air seats from Canada dropped slightly (-0.9%) compared to 2018. In January 2020, scheduled air seats decreased (-9.0%) compared to the same month last year. Discontinued seasonal service from Edmonton (-2,358 seats), and reduced service from Calgary (-22.3%) and Vancouver (-7.3%) offset added seasonal service from Toronto (+425.3%).

## Market Conditions

- Canada's economy seems to have stabilized with support by strong labor markets and modest growth in consumer spending. Real GDP is forecast to expand by 1.8 percent in 2020 and 1.9 percent in 2021, up slightly from 2019's 1.7 percent gain.
- The loonie has been fairly stable so far this year at 75.3 cents U.S., the year-to-date value is 3.0 percent lower than recorded throughout the same period in 2018. Canadians have gotten used to the price of the American Dollar, after a lot of fluctuation in 2018 and early 2019. Economists are predicting the exchange rate to move to 77 U.S. cents by the end of 2020.
- Following a significant drop in December, the national consumer confidence rating increased to 114.1 points in January 2020. The current rating is 12.0 points above the previous month and 4.4 points higher than January 2019. Regionally, consumer confidence registered a monthly increase in every region. In addition, 30.2 percent of respondents nationally indicated now would be a good time to make a major purchase.
- With a population of over 36 million, Canadians made almost 19 million overnight trips to the U.S. throughout the first eleven months of 2019, compared to 18.5 million the previous year. While some destinations recorded a decline in direct air arrivals, most of the tracked cities in Florida, California, Texas and Nevada saw an increase in activity.
- Air Canada and WestJet have extended their grounding of the MAX through April 2020, which has severely affected Air Canada's capacity on the West Coast. According to the airline, more than 20 percent of their flights out of Vancouver and Calgary are being affected, especially in mid-haul destinations like Hawai'i.

## Distribution by Island

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	233,478	222,921	-4.5%	26,477	26,250	0.9%
Maui County	282,463	277,789	-1.7%	31,830	34,101	-6.7%
Maui	279,940	276,055	-1.4%	31,635	33,897	-6.7%
Moloka'i	3,852	4,700	22.0%	355	485	-26.7%
Lāna'i	6,004	5,567	-7.3%	722	946	-23.6%
Kaua'i	88,711	76,474	-13.8%	9,956	10,671	-6.7%
Island of Hawai'i	93,454	97,265	4.1%	14,503	14,246	1.8%

## Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>CANADA</b>	<b>194,682</b>	<b>95,380</b>	<b>61,894</b>	<b>142,807</b>	<b>494,763</b>	<b>211,342</b>	<b>95,344</b>	<b>50,199</b>	<b>127,728</b>	<b>484,613</b>	<b>-7.9</b>	<b>0.0</b>	<b>23.3</b>	<b>11.8</b>	<b>2.1</b>
Calgary	29,235	8,862		15,316	53,413	35,054	9,351		10,110	54,515	-16.6	-5.2		51.5	-2.0
Edmonton	0	0		1,740	1,740	6,812	1,834		0	8,646	100.0	100.0		NA	-79.9
Toronto	10,599	2,040		2,980	15,619	2,912	2,249		2,682	7,843	264.0	-9.3		11.1	99.1
Vancouver	154,848	84,478	61,894	122,771	423,991	166,564	81,910	50,199	114,936	413,609	-7.0	3.1	23.3	6.8	2.5

Source: Diio Mii airline schedules, updated February 26, 2020.

## Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	8,487	-2.0%	644	1,065	-39.5%
True Independent (Net)	440,036	433,697	-1.4%	54,611	57,583	-5.2%
Leisure vs business						
Pleasure (Net)	519,074	504,902	-2.7%	61,243	63,585	-3.7%
MCI (Net)	17,634	17,388	-1.4%	3,044	3,893	-21.8%
Convention/Conf.	11,879	10,555	-11.1%	2,492	2,658	-6.2%
Corp. Meetings	2,413	3,079	27.6%	333	1,100	-69.7%
Incentive	4,036	4,083	1.2%	319	205	55.7%

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	36.0	35.5	-0.5	29.8	30.0	-0.1
Repeaters (%)	64.0	64.5	0.5	70.2	70.0	0.1

## Tax Revenue

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
State tax revenue generated* (\$ Millions)	129.40	125.31	-3.2%	18.72	19.56	-4.3%

\*State government tax revenue generated (direct, indirect, and induced)