



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.

Year-to-date July 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (146,231) vs. MCI (6,376)
Average Length of Stay:	13.22 days
First Time Visitors:	29.4%
Repeat Visitors:	70.6%

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD July 2020P	YTD July 2019	% change YTD
Visitor Expenditures* (\$ Millions)	1,108.5	1,081.5	-2.4%	NA	NA	NA	692.9	NA
Visitor Days	6,743,492	6,554,493	-2.8%	NA	NA	2,060,489	4,188,907	-50.8%
Arrivals	548,702	540,103	-1.6%	NA	NA	155,915	342,474	-54.5%
Average Daily Census	18,475	17,958	-2.8%	NA	NA	9,674	19,759	-51.0%
Per Person Per Day Spending* (\$)	164.4	165.0	0.4%	NA	NA	NA	165.4	NA
Per Person Per Trip Spending* (\$)	2,020.3	2,002.4	-0.9%	NA	NA	NA	2,023.2	NA
Length of Stay (days)	12.29	12.14	-1.3%	NA	NA	13.22	12.23	8.0%

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

Contact Information

Hawai'i Tourism Authority: Laci Goshi, Market Manager
 Tel: (808) 973-2268
laci@gohta.net

Hawai'i Tourism Canada: Lorenzo Campos, Account Director
 VoX International
 130 Queens Quay East, West Tower Suite 1200
 Toronto, Ontario M5A 0P6
 Telephone: (416) 935-1896 ext. 229
lorenzo@voxinternational.com

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

Market Summary

Due to the COVID-19 pandemic, all passengers arriving from out-of-state during July were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. The U.S. Centers for Disease Control and Prevention (CDC) also continued to enforce its “No Sail Order” on all cruise ships.

In July, 94 visitors arrived from Canada compared to 26,939 visitors a year ago. Visitor spending data were not available.

- Through the first seven months of 2020, arrivals decreased 54.5 percent to 155,915 visitors. Visitor days fell 50.8 percent. The average daily census showed 9,674 visitors per day, down 51.0 percent compared to the first seven months of 2019.
- Through the first seven months of 2020, scheduled air seats decreased 49.1 percent compared to the same period last year as a result of discontinued seasonal service from Edmonton (-8,646 seats), and reduced service from Calgary (-41.4%) and Vancouver (-51.3%).
- In 2019, spending by Canadian visitors dropped 2.4 percent to \$1.08 billion. Visitor arrivals (-1.6% to 540,103) and visitor days (-2.8%) decreased while daily visitor spending (+0.4% to \$165 per person) was slightly higher compared 2018. The average daily census showed 17,958 visitors per day in 2019, a decrease of 2.8 percent compared to 2018.
- In 2019, scheduled air seats from Canada dropped slightly (-0.9%) compared to 2018.

Market Conditions

- An 8 percent contraction is forecasted for the Canadian economy this year. The economy is forecast to rebound by 6.7 percent in 2021 and 4.8 percent in 2022.
- The Canadian Dollar has lost value averaging of \$0.73 USD so far this year (-2.3%).
- Consumer confidence continued to improve in July registering a positive gain for the third consecutive month. Overall, the national index score increased to 82.5, almost 70 percent of the pre-pandemic level (120.6). With this increased optimism, the share of people who believe that it is now a good time to make a major purchase rose to 21.9 percent in July, up 12.3 points from its all-time low of 9.6 percent in April.
- The first five months of the year saw Canadians make just 8 million overnight trips to the U.S. and other destinations; a 44.4 percent decline compared to 2019. Compared to 2019, overseas activity has fallen 40.6 percent while transborder trips have decreased 47.3 percent. Canadians made 4.33 million overnight trips to the U.S. during the first five months of 2020, compared to 8.2 million in 2019.
- Air Canada and WestJet have suspended flights to Hawai'i. The 737 MAX 8 landing has also significantly affected Canadian carriers. All Canadian carriers have extended grounding of the Boeing MAX thorough September 2020 at the earliest.
- The Canadian border remains closed and only citizens and permanent residents are currently allowed into the country until at least September 21. Direct relatives of citizens and permanent residents are allowed in the country with a quarantine period of 14 days. The government has extended the period of mandatory quarantine for most people entering the country in which travelers returning to Canada MUST self-isolate for 14 days.

Distribution by Island

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
O'ahu	233,478	227,491	-2.6%	61,742	145,242	-57.5%
Maui County	282,463	278,589	-1.4%	71,786	172,272	-58.3%
Maui	279,940	276,825	-1.1%	71,122	171,068	-58.4%
Moloka'i	3,852	4,840	25.7%	1,023	3,300	-69.0%
Lāna'i	6,004	5,700	-5.1%	1,556	3,742	-58.4%
Kaua'i	88,711	76,777	-13.5%	22,571	48,596	-53.6%
Island of Hawai'i	93,454	97,711	4.6%	35,827	61,115	-41.4%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	164,881		19,990	146,182	331,053	211,342	95,344	50,199	127,728	484,613	-22.0		-60.2	14.4	-31.7
Calgary	26,020			15,316	41,336	35,054	9,351		10,110	54,515	-25.8			51.5	-24.2
Edmonton				1,740	1,740	6,812	1,834			8,646					-79.9
Toronto	9,393			2,980	12,373	2,912	2,249		2,682	7,843	222.6			11.1	57.8
Vancouver	129,468		19,990	126,146	275,604	166,564	81,910	50,199	114,936	413,609	-22.3		-60.2	9.8	-33.4

Source: Diio Mii airline schedules. Updated July 29, 2020.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	8,494	-1.9%	2,124	5,047	-57.9%
True Independent (Net)	440,036	437,503	-0.6%	130,685	277,198	-52.9%
Leisure vs business						
Pleasure (Net)	519,074	509,578	-1.8%	146,231	323,002	-54.7%
MCI (Net)	17,634	17,464	-1.0%	6,376	12,637	-49.5%
Convention/Conf.	11,879	10,668	-10.2%	4,766	7,601	-37.3%
Corp. Meetings	2,413	3,072	27.3%	832	2,171	-61.7%
Incentive	4,036	4,054	0.5%	980	3,090	-68.3%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
1st timers (%)	36.0	35.4	-0.6	29.4	35.9	-6.6
Repeaters (%)	64.0	64.6	0.6	70.6	64.1	6.6

Tax Revenue

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
State tax revenue generated* (\$ Millions)	129.40	126.24	-2.4%	NA	80.88	NA

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