



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 November 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (147,185) vs. MCI (6,393)
Average Length of Stay:	13.60 days
First Time Visitors:	29.2%
Repeat Visitors:	70.8%

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,108.5	1,081.5	-2.4%	NA	NA	NA	951.9	NA
Visitor Days	6,743,492	6,554,493	-2.8%	NA	NA	2,139,674	5,739,597	-62.7%
Arrivals	548,702	540,103	-1.6%	NA	NA	157,367	475,922	-66.9%
Average Daily Census	18,475	17,958	-2.8%	NA	NA	6,387	17,184	-62.8%
Per Person Per Day Spending* (\$)	164.4	165.0	0.4%	NA	NA	NA	165.9	NA
Per Person Per Trip Spending* (\$)	2,020.3	2,002.4	-0.9%	NA	NA	NA	2,000.2	NA
Length of Stay (days)	12.29	12.14	-1.3%	NA	NA	13.60	12.06	12.7%

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

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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

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner. A new policy went into effect on November 24 requiring all trans-Pacific travelers participating in the pre-travel testing program to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrives in the state. Kaua'i, Hawai'i Island, Maui, and Moloka'i also had a partial quarantine in place in November. Lāna'i residents and visitors were under a stay-at-home order from October 27 to November 11. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "No Sail Order" on all cruise ships.

U.S. land borders with Canada have been partially closed since March 2020. Canadians were allowed to travel to the U.S. by air, and returning Canadian residents must self-isolate for 14 days.

In November 2020, 802 visitors arrived from Canada compared to 50,598 visitors a year ago. All 802 visitors came to Hawai'i on domestic flights. Visitor spending data were not available.

- Through the first 11 months of 2020, arrivals decreased 66.9 percent to 157,367 visitors. Visitor days fell 62.7 percent. The average daily census showed 6,387 visitors per day, down 62.8 percent compared to the first 11 months of 2019.
- Through the first 11 months of 2020, scheduled air seats decreased 61.2 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 (-45.3%) and Vancouver (-64.3%).
- 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

- A 6.6 percent contraction is forecasted for the Canadian economy this year due to mandated business closures and a collapse in consumer confidence. The economy is forecast to rebound by 6.7 percent in 2021 and 4.8 percent in 2022.
- In Canada, the economic rebound fueled by the extraordinary government support has surprised by its vigor. Despite the unprecedented upheavals due to the pandemic, the recovery is ahead of the rebound from the last recession at this point, having taken GDP to within 4 percent of the February peak.
- Consumer confidence was 74.1 points in November; the same level as last month. However, the pendulum has swung for all regions. The Atlantic region, BC, and the Prairies—which all had rising indexes the previous month—each logged their largest drop since April. Meanwhile, the indexes of Quebec, Alberta, and Ontario rebounded after their plunge in October. Overall, 58 percent of Canadians expect little change to their finances and job prospects over the next six months.
- Households have benefited from the Canada Emergency Response Benefit, which is set to be replaced by an updated employment insurance system and the Canada Recovery Benefit. These programs will help boost real household disposable income by a record 9 percent this year, despite the recession and massive loss in labor income.

- The Canadian Dollar has lost value averaging at \$0.74 USD so far this year (-1.6%).
- Between January to September, Canadians made 8.5 million overnight trips to the U.S. and other destinations, versus 25.8 million last year. Canadians made 4.8 million overnight trips to the U.S. throughout January to August, compared to 15.7 million in 2019.
- Beginning in mid-December, travelers flying from Canada to Hawai'i may bypass the state's mandatory 10-day quarantine if they take a COVID-19 test from labs identified by Air Canada and WestJet. The test must be taken within 72 hours of travel to the State of Hawai'i, and a negative test result must be received prior to departure. Travelers without proof of a negative test result prior to boarding their flight to Hawai'i will be required to self-quarantine for 10-days or the length of stay, whichever is shorter.
- With Air Canada and WestJet resuming direct flights to Hawai'i in mid December 2020, Air Canada will offer flights from Vancouver to Honolulu and Kahului and from Calgary to Kahului. WestJet will offer flights from Vancouver to Honolulu and Kahului and from Calgary to Honolulu and Kahului.
- Many Canadian insurance companies now offer emergency medical policies that include coverage for COVID-19 and related conditions for Canadian residents.
- U.S. land borders with Canada have been restricted since March 2020 with the partial border closure extended until at least January 21. While the land border is restricted, the Canadians are currently allowed to travel to the U.S. by air.
- The federal government has extended the period of mandatory quarantine until January 21 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 Nov. 2020P	YTD Nov. 2019	% change YTD
O'ahu	233,478	227,491	-2.6%	62,229	201,339	-69.1%
Maui County	282,463	278,589	-1.4%	72,370	247,022	-70.7%
Maui	279,940	276,825	-1.1%	71,705	245,415	-70.8%
Moloka'i	3,852	4,840	25.7%	1,026	4,068	-74.8%
Lāna'i	6,004	5,700	-5.1%	1,556	5,191	-70.0%
Kaua'i	88,711	76,777	-13.5%	22,694	67,861	-66.6%
Island of Hawai'i	93,454	97,711	4.6%	36,183	84,667	-57.3%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	164,881	0	0	54,606	219,487	211,342	95,344	50,199	127,728	484,613	-22.0	100.0	100.0	-57.2	-54.7
Calgary	26,020	0	0	6,898	32,918	35,054	9,351	0	10,110	54,515	-25.8	100.0		-31.8	-39.6
Edmonton	0	0	0	1,740	1,740	6,812	1,834	0	0	8,646	100.0	100.0		NA	-79.9
Toronto	9,393	0	0	0	9,393	2,912	2,249	0	2,682	7,843	222.6	100.0		100.0	19.8
Vancouver	129,468	0	0	45,968	175,436	166,564	81,910	50,199	114,936	413,609	-22.3	100.0	100.0	-60.0	-57.6

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	8,494	-1.9%	2,131	7,568	-71.8%
True Independent (Net)	440,036	437,503	-0.6%	132,077	385,164	-65.7%
Leisure vs business						
Pleasure (Net)	519,074	509,578	-1.8%	147,185	448,556	-67.2%
MCI (Net)	17,634	17,464	-1.0%	6,393	16,150	-60.4%
Convention/Conf.	11,879	10,668	-10.2%	4,771	9,895	-51.8%
Corp. Meetings	2,413	3,072	27.3%	842	2,607	-67.7%
Incentive	4,036	4,054	0.5%	981	3,951	-75.2%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
1st timers (%)	36.0	35.4	-0.6	29.2	36.3	-7.1
Repeaters (%)	64.0	64.6	0.6	70.8	63.7	7.1

Tax Revenue

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	129.40	126.24	-2.4%	NA	111.12	NA

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