



## Canada Fact Sheet

### Canada Overview

VOX International Inc. is contracted by HTA for brand marketing management services in Canada. Canada is the second largest international market for the Hawaiian Islands and has an important relationship with Hawai'i, specifically the western provinces of British Columbia and Alberta. In addition, Ontario is a growing market for Hawai'i. Canadian Snowbirds spend a great amount of time in Hawai'i during the winter months and many Canadians own real estate throughout the islands. In 2021, the marketing strategy is focused on promoting the Hawaiian Culture and Hawaiian values as the big differentiator to any other beach destination and training the Canadian travel trade to become brand ambassadors who can educate and attract the mindful responsible travelers to Hawai'i.

### Year-to-Date March 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$17.2* million
Primary Purpose of Stay:	Pleasure (3,119) vs. MCI (12)
Average Length of Stay:	29.5 days
First Time Visitors:	20.3%
Repeat Visitors:	79.7%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast <sup>2/</sup>	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions) *	1,081.5	361.5*	NA	449.3	17.2*	361.5	NA
Visitor Days	6,554,493	2,224,548	-66.1%	2,664,375	109,574	2,053,433	-94.7%
Arrivals	540,103	161,201	-70.2%	195,431	3,716	155,735	-97.6%
Average Daily Census	17,958	6,078	-66.2%	7,300	1,217	22,565	-94.6%
Per Person Per Day Spending (\$) *	165.0	176.1*	NA	168.6	157.0*	176.1	NA
Per Person Per Trip Spending (\$) *	2,002.4	2,321.4*	NA	2,299.1	4,630.2*	2,321.4	NA
Length of Stay (days)	12.14	13.80	13.7%	13.63	29.49	13.19	123.6%

<sup>\*</sup> 2020 visitor spending data were only available for January – March 2020. Data for other months were not available due to limited samples.

<sup>\*</sup> Year-to-date 2021 visitor spending data were for January and February only. March 2021 spending data were not available due to limited samples.

<sup>2/</sup> Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

### Contact Information

**Hawai'i Tourism Authority:** Chris Sadayasu, Market Manager  
Tel: (808) 973-2274  
csadayasu@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](mailto:lorenzo@voxinternational.com)

<sup>1/</sup> 2021 and 2020 visitor data are preliminary. 2019 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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During March 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. All trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i. Kaua'i County continued to temporarily suspend its participation in the state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kaua'i to quarantine upon arrival except for those participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in March. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

Most travelers to Canada, including returning Canadian nationals, were required to take a COVID-19 molecular test when they arrive in Canada before exiting the airport, and another toward the end of their mandatory 14-day quarantine period. Effective February 18, most air travelers, were required to reserve, prior to departure to Canada, a three-night stay in a government-authorized hotel. In addition, they were required to submit their travel and contact information, including a suitable quarantine plan, electronically via ArriveCAN before boarding their flight.

- In the first quarter of 2021, there were 3,716 visitors from Canada compared to 155,735 visitors in the same period last year. The average daily census showed 1,217 visitors per day compared to 22,565 visitor per day in the first quarter of 2020.
- In the first quarter of 2021, there were 49 (-94.1%) scheduled flights from Canada with 10,232 (-93.8%) seats. Flights from Toronto were suspended. There was limited service from Vancouver (3,132 seats, -97.6%) and Calgary (7,100, -72.7%).
- For all of 2020, arrivals decreased 70.2 percent to 161,201 visitors. Visitor days fell 66.1 percent. The average daily census showed 6,078 visitors per day, down 66.2 percent compared to 2019.
- In 2020, scheduled air seats decreased 63.3 percent compared to last year.
- 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

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- Canada's economy will expand by 5.8 percent this year and 4.0 percent in 2022, thanks to the rollout of vaccines, which has led to a gradual reopening of the economy and boosted confidence.
- The federal fiscal deficit will improve from the \$219 billion recorded in 2020 but will remain uncomfortably high. The Bank of Canada will keep interest rate hikes on hold until the early part of 2023, as inflation, while spiking higher in the spring of this year, will remain in the Bank's 2.0 percent target range through the medium term.
- The Canadian economy has already recovered close to 80 percent of the jobs lost during the severe recession last year and the unemployment rate stood at 8.2 percent in February, down from double-digits in the spring and summer of 2020.

- Consumer confidence continued to climb in March, reaching 105.2 points. This was the largest monthly increase since June 2020 pushing the rating up to 87 percent of its pre-pandemic level (120.6). With lockdown measures gradually easing and increased vaccine availability, Canadians are much more optimistic about the future. Consumers were more satisfied with their current financial situation and more than one-quarter of respondents believe the job market will be better six months from now—a historically high share of positive responses. This optimism resulted in improved purchase sentiment as 24 percent of respondents thought it was a good time to make a major purchase—the highest level recorded in the past year.
- The loonie gained strength throughout the first two months of 2021 reaching an average of USD \$0.787, a 3.7 percent increase over 2020.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	227,491	63,338	-72.2%	1,110	61,634	-98.2%
Maui County	278,589	74,963	-73.1%	2,125	71,742	-97.0%
Maui	276,825	74,293	-73.2%	2,118	71,078	-97.0%
Moloka'i	4,840	1,031	-78.7%	6	1,023	-99.4%
Lāna'i	5,700	1,559	-72.6%	29	1,556	-98.1%
Kaua'i	76,777	22,765	-70.3%	53	22,561	-99.8%
Island of Hawai'i	97,711	36,445	-62.7%	620	35,797	-98.3%

## Airlift

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>CANADA</b>	<b>13,642</b>	<b>41,434</b>	<b>61,894</b>	<b>128,540</b>	<b>245,510</b>	<b>164,881</b>	0	0	13,032	177,913	-91.7	NA	NA	886.3	38.0
Calgary	9,020	980	0	12,693	22,693	26,020	0	0	6,224	32,244	-65.3	NA	NA	103.9	-29.6
Edmonton	0	0	0	1,392	1,392	0	0	0	0	0	NA	NA	NA	NA	NA
Toronto	0	0	0	1,785	1,785	9,393	0	0	0	9,393	100.0	NA	NA	NA	-81.0
Vancouver	4,622	40,454	61,894	112,670	219,640	129,468	0	0	6,808	136,276	-96.4	NA	NA	1,555.0	61.2

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of March 18, 2021, subject to change.

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

CANADA MMA (by Air)	2019	2020P <sup>3/</sup>	% Change 2020 vs 2019	YTD Mar. 2021P <sup>3/</sup>	YTD Mar. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	8,494	2,139	-74.8%	16	2,121	-99.3%
True Independent (Net)	437,503	135,843	-69.0%	3,557	130,507	-97.3%
Leisure vs business						
Pleasure (Net)	509,578	150,573	-70.5%	3,119	146,184	-97.9%
MCI (Net)	17,464	6,396	-63.4%	12	6,375	-99.8%
Convention/Conf.	10,668	4,771	-55.3%	0	4,766	-100.0%
Corp. Meetings	3,072	843	-72.6%	10	831	-98.8%
Incentive	4,054	984	-75.7%	2	980	-99.8%

<sup>3/</sup> Note: Beginning December 2020, certain categories reflect only domestic data (italicized) as international data were not available.

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020P <sup>3/</sup>	% Change 2020 vs 2019	YTD Mar. 2021P <sup>3/</sup>	YTD Mar. 2020	% change YTD
1st timers (%)	35.4	28.7	-6.7	20.3	29.4	-9.1
Repeaters (%)	64.6	71.3	6.7	79.7	70.6	9.1

<sup>3/</sup> Note: Beginning December 2020, certain categories reflect only domestic data (italicized) as international data were not available.

## Tax Revenue

CANADA MMA (by Air)	2019	2020P	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
State tax revenue generated (\$ Millions) <sup>4/</sup>	126.24	42.20*	NA	2.01*	42.20	NA

<sup>4/</sup> State government tax revenue generated (direct, indirect, and induced)

\* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March 2020.

\* Year-to-date 2021 State tax revenue generated were calculated based on visitor spending data for January and February. March 2021 spending data were not available due to limited samples.