



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 May 2021 Quick Facts^{1/}

Visitor Expenditures:	\$17.21 million
Primary Purpose of Stay:	Pleasure (3,906) vs. MCI (28)
Average Length of Stay:	27.64 days
First Time Visitors:	22.4%
Repeat Visitors:	77.6%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{3/}	YTD May 2021P	YTD May 2020P	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	361.5*	NA	449.3	17.2 ^{2/}	361.5†	NA
Visitor Days	6,554,493	2,224,548	-66.1%	2,664,375	132,862	2,054,280	-93.5%
Arrivals	540,103	161,201	-70.2%	195,431	4,807	155,764	-96.9%
Average Daily Census	17,958	6,078	-66.2%	7,300	880	13,515	-93.5%
Per Person Per Day Spending (\$)	165.0	176.0*	NA	168.6	170.9 ^{2/}	176.0†	NA
Per Person Per Trip Spending (\$)	2,002.4	2,321.3*	NA	2,299.1	5,075.0 ^{2/}	2,321.3†	NA
Length of Stay (days)	12.14	13.80	13.7%	13.63	27.64	13.19	109.6%

*2020 visitor spending data for Canada were from January – March 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. Data for November and December 2020 were not available due to limited samples.

^{1/}Year-to-date 2020 visitor spending statistics presented were from January-March 2020 only.

^{2/}Year-to-date 2021 visitor spending data were from January and February only. March-May 2021 spending data were not available due to limited samples.

^{3/}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

^{1/} 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

In May 2021, the State's Safe Travels program was still underway, with most passengers arriving from out-of-state able to bypass the 10-day self-quarantine with a valid negative COVID-19 prior to departure. The counties of Hawai'i, Kaua'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in May. The CDC enforced restrictions on cruise ships through a "Conditional Sail Order."

Travelers to Canada, including returning Canadian nationals, were required to take a COVID-19 molecular test upon arrival, and another test toward the end of their mandatory 14-day quarantine. Prior to departure to Canada, most travelers were required to reserve 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.

- Through the first five months of 2021, there were 4,807 visitors from Canada compared to 155,764 visitors (-96.9%) in year-to-date 2020, versus 296,362 visitors (-98.4%) in year-to-date 2019.
- Through the first five months of 2021, there were 54 scheduled flights with 11,080 seats from Canada. In comparison, there were 824 flights with 164,881 seats in year-to-date 2020, versus 1,540 flights with 289,796 seats in year-to-date May 2019.
- Comparing year-to-date 2021 vs. year-to-date 2020, There was limited service from Vancouver (3,132 seats, -97.6%) and Calgary (7,948, -69.5%) and flights from Toronto were suspended.
- 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

- Canada's economy could be in for a significant rebound this year, according to an upgraded outlook from the Organization for Economic Co-operation and Development (OECD) which now expects the Canadian economy to grow by 6.1 percent in 2021. The prediction is up from an estimated growth of 4.7 percent that the OECD made in March. The rebound is thanks to reduced COVID-19 restrictions in the second half of the year and external demand. Growth in Canada for 2022 is forecasted at 3.8 percent compared with a March estimate of 4.0 percent.
- Higher prices for commodities like oil and the projected increases in demand resulting from the U.S. fiscal package in March are also behind the boost in the country's economic recovery.
- The back half of 2021 could also see increases in consumer spending and improvements to the labour market as public health measures are lifted once the latest waves of COVID-19 die down. The pandemic will continue to pose a risk to the pace of economic recovery, however, as more contractible variants of the disease continue to circulate and force jurisdictions in the country to enact additional health measures.

- The federal government's recent budget indicated it may keep some of the supports given to households and businesses in place until the country is on the other side of the global health crisis.
- After gaining strength in the latter half of 2020, the loonie remained stable in the first three months of 2021 registering an average value of USD \$0.79 (+6.0%), a 7.6% increase over 2020.

Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD May 2021P	YTD May 2020P	% change YTD
O'ahu	227,491	63,338	-72.2%	1,561	61,653	-97.5%
Maui County	278,589	74,963	-73.1%	2,589	71,749	-96.4%
Maui	276,825	74,293	-73.2%	2,575	71,085	-96.4%
Moloka'i	4,840	1,031	-78.7%	21	1,023	-98.0%
Lāna'i	5,700	1,559	-72.6%	49	1,556	-96.9%
Kaua'i	76,777	22,765	-70.3%	158	22,561	-99.3%
Island of Hawai'i	97,711	36,445	-62.7%	859	35,799	-97.6%

Airlift

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	13,510	848	13,278	114,714	142,350	164,881	0	0	13,032	177,913	-91.8	NA	NA	780.2	-20.0
Calgary	8,888	848	0	10,327	20,063	26,020	0	0	6,224	32,244	-65.8	NA	NA	65.9	-37.8
Edmonton	0	0	0	1,392	1,392	0	0	0	0	0	NA	NA	NA	NA	NA
Montreal	0	0	0	1,530	1,530	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	NA	NA	NA	NA	-81.0

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of May 25, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020P ^{3/}	% Change 2020 vs 2019	YTD May 2021P ^{4/}	YTD May 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	2,139	-74.8%	20	2,121	-99.1%
True Independent (Net)	437,503	135,843	-69.0%	4,592	130,536	-96.5%
Leisure vs business						
Pleasure (Net)	509,578	150,573	-70.5%	3,906	146,187	-97.3%
MCI (Net)	17,464	6,396	-63.4%	28	6,376	-99.6%
Convention/Conf.	10,668	4,771	-55.3%	5	4,766	-99.9%
Corp. Meetings	3,072	843	-72.6%	20	832	-97.6%
Incentive	4,054	984	-75.7%	3	980	-99.7%

^{4/} 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 ^{3/}	% Change 2020 vs 2019	YTD May 2021P ^{4/}	YTD May 2020	% Change YTD
1st timers (%)	35.4	28.7	-6.7	22.4	29.4	-6.9
Repeaters (%)	64.6	71.3	6.7	77.6	70.6	6.9

^{4/}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 May 2021P	YTD May 2020P	% Change YTD
State tax revenue generated (\$ Millions) ^{5/}	126.24	42.20 ^{6/}	NA	2.01 ^{7/}	42.20 ^{6/}	NA

^{5/}State government tax revenue generated (direct, indirect, and induced)

^{6/}2020 state tax revenue generated statistics were calculated based visitor spending data from January – March 2020 only. Visitor spending data for the rest of 2020 were not available.

^{7/}Year-to-date 2021 State tax revenue generated were calculated based on visitor spending data for January and February only. March-May 2021 spending data were not available due to limited samples.