



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 August 2021 Quick Facts^{1/}

Visitor Expenditures:	\$44.4 million
Primary Purpose of Stay:	Pleasure (11,600) vs. MCI (139)
Average Length of Stay:	18.63 days
First Time Visitors:	27.8%
Repeat Visitors:	72.2%

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
CANADA MMA (by Air)	1,081.5	NA	NA	258.1	44.4	NA	NA
Visitor Expenditures* (\$ Millions)	1,081.5	NA	NA	258.1	44.4	NA	NA
Visitor Days	6,554,493	2,265,568	-65.4%	1,391,683	253,156	2,103,029	-88.0%
Arrivals	540,103	164,393	-69.6%	112,824	13,586	158,965	-91.5%
Average Daily Census	17,958	6,190	-65.5%	3,813	1,042	8,619	-87.9%
Per Person Per Day Spending (\$)	165.0	NA	NA	185.4	175.6	NA	NA
Per Person Per Trip Spending (\$)	2,002.4	NA	NA	2,287.2	3,271.6	NA	NA
Length of Stay (days)	12.14	13.78	13.6%	12.33	18.63	13.23	40.8%

NA= Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

Contact Information

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

^{1/} 2021 visitor data are preliminary. 2020 and 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.

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

Market Summary

In August 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to a surge in Delta variant cases that has overburdened the state's health care facilities and resources. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

Effective August 9th, 2021 all travelers, regardless of vaccination status, were required to have a negative pre-arrival COVID-19 molecular test result taken no more than 72 hours before arriving in Canada. Fully vaccinated travelers did not need to take a post-arrival test but had to submit their travel information and proof of vaccination using ArriveCAN within 72 hours before arriving. Unvaccinated travelers had to submit their travel and contact information via ArriveCAN, pass all testing requirements (pre-arrival, upon arrival/day 1 and on day 8) and had to quarantine for 14 days.

- Through the first eight months of 2021, there were 13,586 visitors from Canada compared to 158,965 visitors (-91.5%) in the first eight months of 2020, versus 371,146 visitors (-96.3%) in the first eight months of 2019.
- For the first eight months of 2021, total visitor spending was \$44.4 million, a drop of 94.1 percent from \$750.1 million in the first eight months of 2019. Comparative 2020 visitor spending data was not available.
- Through the first eight months of 2021, there were 92 scheduled flights with 17,582 seats from Canada. In comparison, there were 824 flights with 164,881 seats in the first eight months of 2020, versus 1,816 flights with 341,447 seats in the first eight months of 2019.
- Comparing the first eight months of 2021 vs. the first eight months of 2020, there was limited service from Vancouver (9,634 seats, -92.6%) and Calgary (7,948, -69.5%) and flights from Toronto were suspended.
- For all of 2020, arrivals decreased 69.6 percent to 164,393 visitors. Visitor days fell 65.4 percent. The average daily census was 6,190 visitors, down 65.5 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 was 17,958 visitors 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 is projected to expand by 6.7 percent this year and 4.4 percent in 2022. This represents an upgrade from the spring update and partly reflects the generally successful rollout of vaccines that has led to a gradual reopening of the economy and a boost in confidence.
- As the number of COVID-19 cases—driven mainly by the delta variant—picked up again across the country, many Canadians started to worry about the future, especially on the economic impact of potential restrictions to curb the fourth wave. During the month, the index retreated 7.7 points to 113.5, dropping back below its pre-pandemic rating. Consumers remain cautious about their finances and spending. However, relatively high vaccination rates will allow provinces to employ more lenient restrictions this fall than in previous waves, which suggests a smaller negative impact on consumer confidence and spending in the near term.
- The loonie posted an average value of USD \$0.80 2021 year-to-date, a 9.1 percent increase over 2020.
- The Canadian border reopened to fully vaccinated travelers from all countries on September 7. Fully vaccinated travelers no longer have to do on-arrival and day eight testing, but they still have to show a negative PCR test to enter the country (regardless of vaccination status).
- As of Sep. 8, more than 54,096,894 doses of approved COVID-19 vaccines have been administered across Canada. 63,600,294 doses have been distributed to the provinces, 28,236,559 people (85% of the population ages 12+) have received their first doses and at least 25,860,335 people (77% of the population ages 12+) have been fully vaccinated.

Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% change YTD
O'ahu	227,491	66,240	-70.9%	6,115	64,579	-90.5%
Maui County	278,589	75,634	-72.9%	6,353	72,355	-91.2%
Maui	276,825	74,974	-72.9%	6,291	71,698	-91.2%
Moloka'i	4,840	1,042	-78.5%	47	1,037	-95.5%
Lāna'i	5,700	1,602	-71.9%	105	1,599	-93.4%
Kaua'i	76,777	22,958	-70.1%	789	22,778	-96.5%
Island of Hawai'i	97,711	36,732	-62.4%	2,005	36,135	-94.4%

Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	10,232	848	20,416	133,010	164,506	164,881	0	0	13,032	177,913	-93.8	NA	NA	920.6	-7.5
Calgary	7,100	848	0	15,901	23,849	26,020	0	0	6,224	32,244	-72.7	NA	NA	155.5	-26.0
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	2,894	2,894	9,393	0	0	0	9,393	-100.0	NA	NA	NA	-69.2

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of July 26, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	NA	93	NA	NA
True Independent (Net)	437,503	NA	NA	11,997	NA	NA
Leisure vs business						
Pleasure (Net)	509,578	153,536	-69.9%	11,600	149,008	-92.2%
MCI (Net)	17,464	6,485	-62.9%	139	6,465	-97.9%
Convention/Conf.	10,668	4,842	-54.6%	41	4,836	-99.2%
Corp. Meetings	3,072	856	-72.1%	62	845	-92.6%
Incentive	4,054	995	-75.5%	36	991	-96.4%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
1st timers (%)	35.4	NA	NA	27.8	NA	NA
Repeaters (%)	64.6	NA	NA	72.2	NA	NA

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

Tax Revenue

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	NA	5.19	NA	NA

^{2/}State government tax revenue generated (direct, indirect, and induced).