



## 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 September 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$57.1 million
Primary Purpose of Stay:	Pleasure (15,366) vs. MCI (232)
Average Length of Stay:	17.89 days
First Time Visitors:	32.6%
Repeat Visitors:	67.4%

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	NA	68.1	57.1	NA	NA
Visitor Days	6,554,493	2,265,568	-65.4%	381,638	320,386	2,114,357	-84.8%
Arrivals	540,103	164,393	-69.6%	21,126	17,913	159,138	-88.7%
Average Daily Census	17,958	6,190	-65.5%	1,046	1,174	7,717	-84.8%
Per Person Per Day Spending (\$)	165.0	NA	NA	178.4	178.3	NA	NA
Per Person Per Trip Spending (\$)	2,002.4	NA	NA	3,223.3	3,188.3	NA	NA
Length of Stay (days)	12.14	13.78	13.6%	18.07	17.89	13.29	34.6%

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.  
<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

### Contact Information

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<sup>1/</sup> 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.

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## **Market Summary**

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In September 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.

In September 2021, all travelers, including returning Canadian residents, were required to have a negative pre-arrival COVID-19 molecular test result taken no more than 72 hours before entry into Canada. Fully vaccinated travelers did not need to take a post-arrival test but must submit their travel information and proof of vaccination using ArriveCAN within 72 hours before arriving. Unvaccinated travelers must submit their travel and contact information via ArriveCAN, pass all testing requirements (pre-arrival, upon arrival/day-1 and on day 8) and must quarantine for 14-days.

- Through the first nine months of 2021, there were 17,913 visitors from Canada compared to 159,138 visitors (-88.7%) in the first nine months of 2020, versus 393,074 visitors (-95.4%) in the first nine months of 2019.
- For the first nine months of 2021, total visitor spending was \$57.1 million, a drop of 92.8 percent from \$790.6 million in the first nine months of 2019. Comparative 2020 visitor spending data was not available.
- Through the first nine months of 2021, there were 98 scheduled flights with 18,596 seats from Canada. In comparison, there were 824 flights with 164,881 seats in the first nine months of 2020, versus 1,898 flights with 356,885 seats in the first nine months of 2019.
- Comparing the first nine months of 2021 vs. the first nine months of 2020, there was limited service from Vancouver (10,648 seats, -91.8%) 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 5.1 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.
- High levels of consumer savings and government stimulus are still powering through the system but will soon begin to ease.
- After surpassing the pre-pandemic rating in July 2021, the Index of Consumer Confidence dropped by 7.7 points in August and another 3.5 points in September. This was the first consecutive monthly decline since March 2020. Amid the fourth wave of the pandemic, several jurisdictions have paused re-opening plans and introduced new access restrictions, including proof-of-vaccination.
- The loonie posted an average value of USD \$0.80 2021 year-to-date, a 9.1 percent increase over 2020.
- On September 7, the Canadian border reopened to fully vaccinated travelers from all countries. Fully vaccinated travelers no longer have to do on-arrival and day eight testing, but they may be subject to random testing at the border.
- As of September 20, the United States extended restrictions at its land borders with Canada and Mexico through October 21. The federal government's advisory against all non-essential international travel during the pandemic remains in effect until further notice. Because it's an advisory — not an order — Canadians can still travel abroad, but they do so at their own risk.
- As of October 2, just over 76 percent of the population of Canada had received at least one COVID-19 vaccination dose, of those just over 71 percent were fully vaccinated.
- As of October 6, Canadian travelers along with air travel and rail employees, must be fully vaccinated against COVID-19 by October 29, according to new measures announced by the prime minister. The mandatory vaccine policy for the travel sector coincides with similar measures for public servants, who must attest they are fully vaccinated against COVID-19 by the same date or be put on unpaid administrative leave.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
O'ahu	227,491	66,240	-70.9%	8,226	64,626	-87.3%
Maui County	278,589	75,634	-72.9%	8,434	72,396	-88.4%
Maui	276,825	74,974	-72.9%	8,358	71,738	-88.3%
Moloka'i	4,840	1,042	-78.5%	66	1,037	-93.6%
Lāna'i	5,700	1,602	-71.9%	125	1,599	-92.2%
Kaua'i	76,777	22,958	-70.1%	1,137	22,784	-95.0%
Island of Hawai'i	97,711	36,732	-62.4%	2,645	36,214	-92.7%

## Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>CANADA</b>	<b>10,232</b>	<b>848</b>	<b>20,416</b>	<b>123,359</b>	<b>154,855</b>	<b>164,881</b>	0	0	<b>13,032</b>	<b>177,913</b>	<b>-93.8</b>			<b>846.6</b>	<b>-13.0</b>
Calgary	7,100	848		14,711	22,659	26,020	0		6,224	32,244	-72.7			136.4	-29.7
Edmonton				1,392	1,392				0	0				NA	NA
Montreal				1,788	1,788				0	0				NA	NA
Toronto	0			2,980	2,980	9393			0	9,393	-100.0			NA	-68.3
	3,132		20,416	102,488	126,036	129,468		0	6,808	136,276	-97.6		NA	1405.4	-7.5

Source: DBEDT analysis based on scheduled Seats from Dlio Mi flight schedules as of October 20, 2021, subject to change.

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

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	NA	146	NA	NA
True Independent (Net)	437,503	NA	NA	15,816	NA	NA
Leisure vs business						
Pleasure (Net)	509,578	153,536	-69.9%	15,366	149,060	-89.7%
MCI (Net)	17,464	6,485	-62.9%	232	6,468	-96.4%
Convention/Conf.	10,668	4,842	-54.6%	65	4,837	-98.7%
Corp. Meetings	3,072	856	-72.1%	91	847	-89.3%
Incentive	4,054	995	-75.5%	76	991	-92.3%

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 Sep. 2021	YTD Sep. 2020	% Change YTD
1st timers (%)	35.4	NA	NA	32.6	NA	NA
Repeaters (%)	64.6	NA	NA	67.4	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 Sep. 2021	YTD Sep. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	NA	6.67	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).