



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 November 2021 Quick Facts^{1/}

Visitor Expenditures:	\$140.8 million
Primary Purpose of Stay:	Pleasure (44,630) vs. MCI (836)
Average Length of Stay:	16.02 days
First Time Visitors:	25.1%
Repeat Visitors:	74.9%

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	NA	68.1	140.8	NA	NA
Visitor Days	6,554,493	2,265,568	-65.4%	381,638	794,959	2,176,722	-63.5%
Arrivals	540,103	164,393	-69.6%	21,126	49,614	160,329	-69.1%
Average Daily Census	17,958	6,190	-65.5%	1,046	2,380	6,498	-63.4%
Per Person Per Day Spending (\$)	165.0	NA	NA	178.4	177.1	NA	NA
Per Person Per Trip Spending (\$)	2,002.4	NA	NA	3,223.3	2,837.0	NA	NA
Length of Stay (days)	12.14	13.78	13.6%	18.07	16.02	13.58	18.0%

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

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^{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.

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Market Summary

In November 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. 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 November 2021, all travelers to Canada, including returning Canadian residents, were required to have a negative pre-arrival COVID-19 molecular test result taken within 72 hours before entry into Canada. Fully vaccinated travelers did not need a post-arrival test but are required to submit their travel information and proof of vaccination using ArriveCAN within 72 hours before arrival. 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 11 months of 2021, there were 49,614 visitors from Canada compared to 160,329 visitors (-69.1%) in the first 11 months of 2020, versus 475,922 visitors (-89.6%) in the first 11 months of 2019.
- For the first 11 months of 2021, total visitor spending was \$140.8 million, a decrease of 85.2 percent from \$951.9 million in the first 11 months of 2019. Comparative 2020 visitor spending data was not available.
- Through the first 11 months of 2021, there were 385 scheduled flights with 78,410 seats from Canada. In comparison, there were 824 flights with 164,881 seats in the first 11 months of 2020, versus 2,243 flights with 424,534 seats in the first 11 months of 2019.
- Comparing the first 11 months of 2021 vs. the first 11 months of 2020, there was limited service from Vancouver (68,048 seats, -47.4%) and Calgary (10,362, -60.2%); while 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.
- Canadian labor markets have largely recovered from the pandemic but pressures that existed pre-COVID have resumed and have been exacerbated. Evidence of labor shortages is now more widespread, spanning all levels of skilled occupations. The policy and market response can include growing the supply of labor: incenting older workers to stay in the workforce, to and beyond age 65, and bolstering our immigration intake of knowledge workers.
- After a slight uptick last month, the Index of Consumer Confidence faltered in November 2021, falling 5-points to 108.2. This is the lowest level recorded since May 2021, pushing the index back to 10 percent below its pre-pandemic level. Lower confidence levels were recorded across Canada, except in Ontario. Unlike last month, confidence regarding future job prospects lost steam, but the share of consumers with optimistic views remains higher than before the pandemic.
- The loonie posted an average value of USD \$0.79 2021 year-to-date, a 9 percent increase over 2020.
- Almost 237 thousand Canadians returned from an overnight transborder trip in September 2021. Activity was up 331 percent from September 2020 and now reflects 14 percent of the monthly volume seen pre-pandemic. So far in 2021, 1.1 million Canadians have taken an overnight transborder trip, 59 percent of which occurred in Quarter 3.
- As of December 9, 31,212,118 people (85.87% of the population ages 5+) have received their first doses, at least 29,144,837 people (80.18% of the population ages 5+) have been fully vaccinated, and 2,074,665 3rd doses have been administered.

Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
O'ahu	227,491	66,240	-70.9%	20,104	65,019	-69.1%
Maui County	278,589	75,634	-72.9%	25,785	72,921	-64.6%
Maui	276,825	74,974	-72.9%	25,586	72,263	-64.6%
Moloka'i	4,840	1,042	-78.5%	264	1,040	-74.7%
Lāna'i	5,700	1,602	-71.9%	305	1,599	-80.9%
Kaua'i	76,777	22,958	-70.1%	4,664	22,884	-79.6%
Island of Hawai'i	97,711	36,732	-62.4%	7,332	36,469	-79.9%

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	123,359	154,855	164,881	0	0	13,032	177,913	-93.8			846.6	-13.0
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 Diio 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 Nov. 2021	YTD Nov. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	NA	443	NA	NA
True Independent (Net)	437,503	NA	NA	44,591	NA	NA
Leisure vs business						
Pleasure (Net)	509,578	153,536	-69.9%	44,630	149,948	-70.2%
MCI (Net)	17,464	6,485	-62.9%	836	6,482	-87.1%
Convention/Conf.	10,668	4,842	-54.6%	204	4,842	-95.8%
Corp. Meetings	3,072	856	-72.1%	303	855	-64.6%
Incentive	4,054	995	-75.5%	364	992	-63.4%

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 Nov. 2021	YTD Nov. 2020	% Change YTD
1st timers (%)	35.4	NA	NA	25.1	NA	NA
Repeaters (%)	64.6	NA	NA	74.9	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 Nov. 2021	YTD Nov. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	NA	16.43	NA	NA

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