



## Canada Fact Sheet

### Canada Overview

Canada is the second largest international market and fourth largest source market overall for visitors to Hawai'i. A slowdown in the Canadian economy and a weakened Canadian dollar have impacted the booking pace for the Hawaiian Islands. HTA works with VoX International, its marketing contractor for Canada, to stimulate demand and retain market share while targeting key segments.

### Year-to-date June 2020 Quick Facts<sup>1</sup>

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (146,201) vs. MCI (6,376)
Average Length of Stay:	13.20 days
First Time Visitors:	29.4%
Repeat Visitors:	70.6%

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD June 2020P	YTD June 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	1,108.5	1,073.5	-3.2%	NA	NA	NA	635.9	NA
Visitor Days	6,743,492	6,493,083	-3.7%	NA	NA	2,057,170	3,804,917	-45.9%
Arrivals	548,702	535,267	-2.4%	NA	NA	155,821	310,248	-49.8%
Average Daily Census	18,475	17,789	-3.7%	NA	NA	11,303	21,022	-46.2%
Per Person Per Day Spending* (\$)	164.4	165.3	0.6%	NA	NA	NA	167.1	NA
Per Person Per Trip Spending* (\$)	2,020.3	2,005.6	-0.7%	NA	NA	NA	2,049.7	NA
Length of Stay (days)	12.29	12.13	-1.3%	NA	NA	13.20	12.26	7.6%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

### Contact Information

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<sup>1</sup> 2020 and 2019 visitor data are preliminary. 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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Due to the COVID-19 pandemic, all passengers arriving from out-of-state during June were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. The interisland quarantine was in effect for the first half of June, ending on June 15. The U.S. Centers for Disease Control and Prevention (CDC) also continued to enforce its “No Sail Order” on all cruise ships.

In June 2020, 57 visitors arrived from Canada compared to 19,239 visitors a year ago. Visitor spending data were not available.

- Through the first half of 2020, arrivals decreased 49.8 percent to 155,821 visitors. Visitor days fell 45.9 percent. The average daily census showed 11,303 visitors per day, down 46.2 percent compared to the first half of 2019.
- Through the first half of 2020, scheduled air seats decreased 46.2 percent compared to the same period last year as a result of discontinued seasonal service from Edmonton (-8,646 seats), and reduced service from Calgary (-41.4%) and Vancouver (-47.9%).
- In 2019, spending by Canadian visitors dropped 3.2 percent to \$1.07 billion. Visitor arrivals (-2.4% to 535,267) and visitor days (-3.7%) decreased while daily visitor spending (+0.6% to \$165 per person) was slightly higher compared 2018. The average daily census showed 17,789 visitors per day in 2019, a decrease of 3.7 percent compared to 2018.
- In 2019, scheduled air seats from Canada dropped slightly (-0.9%) compared to 2018.

## Market Conditions

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- Mandated business closures and a collapse in both business and consumer confidence will result in an 8.2 percent contraction for the Canadian economy this year—the worst annual contraction on record. With the worst of the recession likely over, the outlook for 2021 is brighter. The economy is forecast to rebound by 6.7 percent in 2021 and 4.8 percent in 2022.
- At its peak, roughly 3 million Canadians had lost their jobs due to the pandemic. The worst does appear to have passed, however, as nearly 300,000 jobs were regained in May. Nevertheless, the road to recovery will be long and employment will still be nearly 1.1 million lower for 2020 as a whole than it was in 2019.
- The Canadian Dollar has lost value averaging of \$0.73 USD so far this year (-2.3%).
- Overall, the national index score increased 16 points to 79.7, roughly two-thirds of the pre-pandemic level (120.6). Confidence improved across all regions during the month with BC posting the largest monthly increase (23.1 points) and Ontario recording the smallest change (9.3 points).
- According to the Summer Travel Intention report of the Conference Board of Canada, amidst the global COVID-19 pandemic, summer travel intentions have fallen to the lowest level ever. Just 45% of Canadians are currently planning an overnight leisure trip, and two-thirds of this activity will be within Canada. Of those who have selected a destination, only 31% have plans to leave the country, with sixty percent of these trips intended for the latter half of the season.

- Air Canada and WestJet are suspending most international flights through August, including Hawaii. Both Air Canada (-33%) and WestJet (-49%) are reporting reductions in direct service throughout the summer travel season (May-Oct). The 737 MAX 8 landing has also significantly affected Canadian carriers. All Canadian carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.
- The Canadian border remains closed and only citizens and permanent residents are currently allowed into the country until at least August 21. Direct relatives of citizens and permanent residents are allowed in the country with a quarantine period of 14 days. The government has extended the period of mandatory quarantine for most people entering the country until Aug. 31. Travelers returning to Canada MUST self-isolate for 14 days.

## Distribution by Island

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD June 2020P	YTD June 2019P	% change YTD
O'ahu	233,478	222,921	-4.5%	61,684	126,873	-51.4%
Maui County	282,463	277,789	-1.7%	71,763	156,355	-54.1%
Maui	279,940	276,055	-1.4%	71,099	155,259	-54.2%
Moloka'i	3,852	4,700	22.0%	1,023	2,835	-63.9%
Lāna'i	6,004	5,567	-7.3%	1,556	3,172	-51.0%
Kaua'i	88,711	76,474	-13.8%	22,567	44,287	-49.0%
Island of Hawai'i	93,454	97,265	4.1%	35,806	55,585	-35.6%

## Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>CANADA</b>	164,881		19,990	146,182	331,053	211,342	95,344	127,728	484,613	-22.0		-60.2	14.4		-31.7
Calgary	26,020			15,316	41,336	35,054	9,351		10,110	54,515	-25.8			51.5	-24.2
Edmonton				1,740	1,740	6,812	1,834			8,646					-79.9
Toronto	9,393			2,980	12,373	2,912	2,249		2,682	7,843	222.6			11.1	57.8
Vancouver	129,468		19,990	126,146	275,604	166,564	81,910	50,199	114,936	413,609	-22.3		-60.2	9.8	-33.4

Source: Diio Mii airline schedules. Updated July 29, 2020.

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

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD June 2020P	YTD June 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	8,487	-2.0%	2,122	4,478	-52.6%
True Independent (Net)	440,036	433,697	-1.4%	130,592	252,106	-48.2%
Leisure vs business						
Pleasure (Net)	519,074	504,902	-2.7%	146,201	292,581	-50.0%
MCI (Net)	17,634	17,388	-1.4%	6,376	12,318	-48.2%
Convention/Conf.	11,879	10,555	-11.1%	4,766	7,360	-35.3%
Corp. Meetings	2,413	3,079	27.6%	832	2,153	-61.3%
Incentive	4,036	4,083	1.2%	980	3,029	-67.6%

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD June 2020P	YTD June 2019P	% change YTD
1st timers (%)	36.0	35.5	-0.5	29.4	34.9	-5.5
Repeaters (%)	64.0	64.5	0.5	70.6	65.1	5.5

## Tax Revenue

CANADA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD June 2020P	YTD June 2019P	% change YTD
State tax revenue generated* (\$ Millions)	129.40	125.31	-3.2%	NA	74.23	NA

\*State government tax revenue generated (direct, indirect, and induced)