



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 December 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (150,573) vs. MCI (6,396)
Average Length of Stay:	13.80 days
First Time Visitors:	28.7%
Repeat Visitors:	71.3%

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,108.5	1,081.5	-2.4%	474.9	-56.1%	NA	1,081.5	NA
Visitor Days	6,743,492	6,554,493	-2.8%	2,709,495	-58.7%	2,224,548	6,554,493	-66.1%
Arrivals	548,702	540,103	-1.6%	185,672	-65.6%	161,201	540,103	-70.2%
Average Daily Census	18,475	17,958	-2.8%	8,088	-55.0%	6,078	17,958	-66.2%
Per Person Per Day Spending* (\$)	164.4	165.0	0.4%	175.3	6.2%	NA	165.0	NA
Per Person Per Trip Spending* (\$)	2,020.3	2,002.4	-0.9%	2,557.7	27.7%	NA	2,002.4	NA
Length of Stay (days)	12.29	12.14	-1.3%	14.59	20.2%	13.80	12.14	13.7%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts.

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

Market Summary

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in Hawai'i. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's (CDC) guidelines. The counties of Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in December. In addition, the CDC continued to enforce the "No Sail Order" on all cruise ships.

Travelers returning to Canada must self-isolate for 14 days. On December 30, the Ministry of Transportation imposed a mandatory negative PCR test result before boarding a plane into Canada in addition to the 14-day quarantine upon arrival.

In December 2020, 3,833 visitors arrived from Canada compared to 64,182 visitors a year ago. Direct flights from Canada resumed in December and brought 2,964 visitors. The remaining 869 visitors arrived on domestic flights. Visitor spending data were not available.

- 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 as a result of discontinued seasonal service from Edmonton (-8,646 seats), and reduced service from Calgary (-40.9%) and Vancouver (-67.1%).
- 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

- Campaigns for COVID-19 vaccination are beginning across Canada. However, it will take many more months before the vaccines reach enough of the population that the society and economy can begin to truly recover. Dealing with the public health crisis has necessitated renewed regional shutdowns and slowed economic growth dramatically from the rebound witnessed in the third quarter.
- The Canadian economy is forecast to rebound by 4.9 percent in 2021 and 4.2 percent in 2022.
- Despite the second wave of COVID-19, consumer confidence was 85.8 points in December; the highest level recorded since March. Compared to the previous month, confidence increased quite a bit in Atlantic Canada, Ontario, and BC, while little change was registered in the Prairies and Quebec recorded a decline. Overall, 58 percent of Canadians expect their household finances to remain the same over the next six months.
- The Canadian Dollar has lost value averaging at \$0.74 USD in 2020 (-1.6%).

- Total overnight outbound trips are down -69 percent compared to the first ten months of 2019. Canadians have made just 8.6 million overnight trips to the U.S. and other destinations in 2020 versus 28.2 million last year. Canadians made 4.55 million overnight trips to the U.S. throughout the first ten months of 2020, compared to 17.2 million in 2019.
- U.S. land borders with Canada have been restricted since March 2020 with the partial border closure extended until at least February 21.
- The federal government has extended the period of mandatory quarantine until February 21 for most people entering the country in which travelers returning to Canada must self-isolate for 14 days.
- Each province and territory have created its own travel rules in response to the pandemic — and those rules are subject to change. On December 30, the Ministry of Transportation imposed a mandatory negative PCR test result before boarding a plane into Canada on top of the 14-day quarantine upon arrival.
- The city of Toronto and the region of Peel in Ontario, as well as the Province of Quebec, went back to complete lockdown again in late November. On December 21st, the whole Province of Ontario joined Toronto and Peel in the lockdown status as numbers peaked in the province.

Distribution by Island

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	233,478	227,491	-2.6%	63,338	227,491	-72.2%
Maui County	282,463	278,589	-1.4%	74,963	278,589	-73.1%
Maui	279,940	276,825	-1.1%	74,293	276,825	-73.2%
Moloka'i	3,852	4,840	25.7%	1,031	4,840	-78.7%
Lāna'i	6,004	5,700	-5.1%	1,559	5,700	-72.6%
Kaua'i	88,711	76,777	-13.5%	22,765	76,777	-70.3%
Island of Hawai'i	93,454	97,711	4.6%	36,445	97,711	-62.7%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	164,881	0	0	54,606	219,487	211,342	95,344	50,199	127,728	484,613	-22.0	100.0	100.0	-57.2	-54.7
Calgary	26,020	0	0	6,898	32,918	35,054	9,351	0	10,110	54,515	-25.8	100.0		-31.8	-39.6
Edmonton	0	0	0	1,740	1,740	6,812	1,834	0	0	8,646	100.0	100.0		NA	-79.9
Toronto	9,393	0	0	0	9,393	2,912	2,249	0	2,682	7,843	222.6	100.0		100.0	19.8
Vancouver	129,468	0	0	45,968	175,436	166,564	81,910	50,199	114,936	413,609	-22.3	100.0	100.0	-60.0	-57.6

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	8,494	-1.9%	2,139	8,494	-74.8%
True Independent (Net)	440,036	437,503	-0.6%	135,843	437,503	-69.0%
Leisure vs business						
Pleasure (Net)	519,074	509,578	-1.8%	150,573	509,578	-70.5%
MCI (Net)	17,634	17,464	-1.0%	6,396	17,464	-63.4%
Convention/Conf.	11,879	10,668	-10.2%	4,771	10,668	-55.3%
Corp. Meetings	2,413	3,072	27.3%	843	3,072	-72.6%
Incentive	4,036	4,054	0.5%	984	4,054	-75.7%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
1st timers (%)	36.0	35.4	-0.6	28.7	35.4	-6.7
Repeaters (%)	64.0	64.6	0.6	71.3	64.6	6.7

1/ Note: In December 2020, certain categories reflect only domestic data (italicized) as international data were not available.

Tax Revenue

CANADA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	129.40	126.24	-2.4%	NA	126.24	NA

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