



## 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.

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

Visitor Expenditures: \$14.9 million  
 Primary Purpose of Stay: Pleasure (2,507) vs. MCI (6)  
 Average Length of Stay: 30.02 days  
 First Time Visitors: 16.6%  
 Repeat Visitors: 83.4%

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	2021* Forecast	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
Visitor Expenditures* (\$ Millions)	1,081.5	NA	NA	807.2	14.9	160.4	-90.7%
Visitor Days	6,554,493	2,224,548	-66.1%	5,227,258	87,001	913,550	-90.5%
Arrivals	540,103	161,201	-70.2%	432,309	2,898	65,123	-95.6%
Average Daily Census	17,958	6,078	-66.2%	14,321	2,806	29,469	-90.5%
Per Person Per Day Spending* (\$)	165.0	NA	NA	154.4	171.8	175.6	-2.1%
Per Person Per Trip Spending* (\$)	2,002.4	NA	NA	1,867.2	5,159.0	2,462.8	109.5%
Length of Stay (days)	12.14	13.80	13.7%	12.09	30.02	14.03	114.0%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2020).

### Contact Information

**Hawai'i Tourism Authority:** Jadie Goo, Director of Marketing  
 Tel: (808) 973-2252  
[jadie@gohta.net](mailto:jadie@gohta.net)

**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](mailto:lorenzo@voxinternational.com)

<sup>1</sup> 2020 visitor data are preliminary. 2019 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

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During January, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. 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. On December 2, 2020 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. However, starting January 5, 2021 Kaua'i County rejoined the Safe Travels program for inter-island arrivals, allowing inter-island travelers who have been in Hawai'i for more than three days to bypass the quarantine with a valid test result. Also starting January 5 on Kaua'i, trans-Pacific travelers were given the option of participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in January. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

The U.S. and Canadian governments extended cross-border travel restrictions to non-essential travel through at least March 21, 2021. Air travelers five years of age or older were required to provide their airline with a negative COVID-19 molecular polymerase chain reaction (PCR) test within 72 hours of travel to Canada. All passengers, including returning Canadian residents were also required to quarantine for 14 days. Travelers from Canada could bypass Hawai'i's mandatory 10-day quarantine with a valid negative test result from a Canada Trusted Testing Partner.

- In January 2021, 2,898 visitors arrived from Canada compared to 65,123 visitors a year ago. Direct flights from Canada brought 2,356 visitors while the remaining 542 visitors arrived on domestic flights. Visitors from Canada spent \$14.9 million (-90.7%) and \$172 per person (-2.1%) on a daily basis.
- In January 2021, there were 31 (-90.6%) scheduled flights from Canada with 6,978 (-89.4%) seats. Flights from Toronto were suspended. There was limited service from Vancouver (2,610 seats, -95.1%) and reduced service from Calgary (4,368, -50.4%).
- In 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.
- 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

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- Canada's real GDP is forecast to post growth of 5.3 percent in 2021 and 3.5 percent in 2022. This follows the deepest recession in modern times.
- Canada's economy rebounded through the summer, but rising COVID-19 cases, both at home and south of the border, will slow the pace of recovery.

- A successful rollout of vaccines will encourage households to spend some of what they've amassed in savings. Household balance sheets are in great shape thanks to government support and travel bans that have cut spending on foreign travel to almost nothing.
- The federal and provincial governments are pledging continued support to businesses and households. The pandemic will drive up public debt to record levels, putting a strain on government finances and public spending once the crisis is past.
- Despite the second wave of COVID-19, consumer confidence increased to 90.7 points in January 2021, the highest level since the pandemic began. With the extension of income support programs and the initial round of vaccinations, Canadians were more positive regarding their financial situation and in their views towards the timing of major purchases.
- Air Canada stopped its services to Hawai'i until April 2021.
- WestJet continues with reduced capacity only into Maui.
- The four Canadian major carriers (Air Canada, WestJet, Air Transat and Sunwing) agreed with the federal government to stop flights into Mexico and the Caribbean until April 30, 2021.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
O'ahu	227,491	63,338	-72.2%	785	26,477	-97.0%
Maui County	278,589	74,963	-73.1%	1,722	31,830	-94.6%
Maui	276,825	74,293	-73.2%	1,722	31,635	-94.6%
Moloka'i	4,840	1,031	-78.7%	3	355	-99.1%
Lāna'i	5,700	1,559	-72.6%	18	722	-97.5%
Kaua'i	76,777	22,765	-70.3%	27	9,956	-99.7%
Island of Hawai'i	97,711	36,445	-62.7%	475	14,503	-96.7%

## Airlift

	2020	2019	% CHANGE
<b>CANADA</b>	<b>177,913</b>	<b>484,613</b>	<b>-63.3</b>
Calgary	32,244	54,515	-40.9
Edmonton	0	8,646	-100.0
Toronto	9,393	7,843	19.8
Vancouver	136,276	413,609	-67.1

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules.

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

CANADA MMA (by Air)	2019	2020P 1/	% Change 2020 vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	8,494	2,139	-74.8%	13	644	-98.0%
True Independent (Net)	437,503	135,843	-69.0%	2,769	54,611	-94.9%
Leisure vs business						
Pleasure (Net)	509,578	150,573	-70.5%	2,507	61,243	-95.9%
MCI (Net)	17,464	6,396	-63.4%	6	3,044	-99.8%
Convention/Conf.	10,668	4,771	-55.3%	0	2,492	-100.0%
Corp. Meetings	3,072	843	-72.6%	6	333	-98.3%
Incentive	4,054	984	-75.7%	1	319	-99.7%

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

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020P 1/	% Change 2020 vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020	% change YTD
1st timers (%)	35.4	28.7	-6.7	16.6	29.8	-13.3
Repeaters (%)	64.6	71.3	6.7	83.4	70.2	13.3

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

## Tax Revenue

CANADA MMA (by Air)	2019	2020P	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
State tax revenue generated* (\$ Millions)	126.24	NA	NA	1.75	18.72	-90.7

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