



# Canada Market Outlook

**HTA Tourism Conference  
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President



# 2022 CANADA RECAP



HAWAII TOURISM™  
CANADA



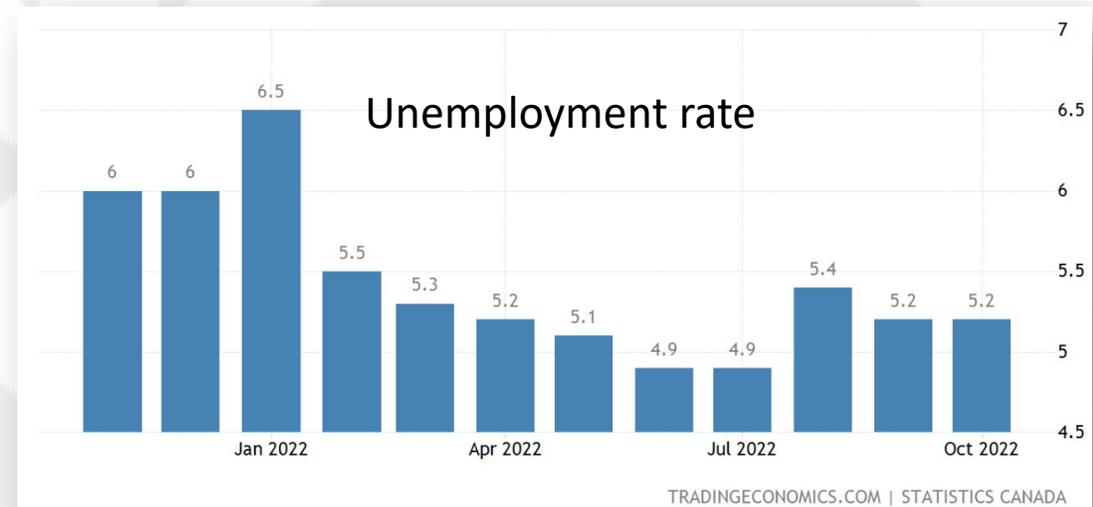
# CANADA MARKET OUTLOOK

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# GENERAL ECONOMY

Economic Indicators	2019	2020	2021	2022f	2023f	2024f
GDP, market prices (2012 \$) (% change)	1.9%	-5.2%	4.5%	3.5%	3.3%	2.0%
Real Disposable Income (2012 \$) (% change)	3.0%	8.3%	0.3%	-1.9%	0.7%	2.8%
Household Spending (2012 \$) (% change)	1.4%	-6.2%	5.0%	4.7%	3.0%	2.5%
CAD/USD	\$0.75	\$0.74	\$0.80	\$0.80	\$0.79	\$0.78



Source: Conference Board of Canada

# TRAVEL RESTRICTIONS

October 1, 2022, Canada ended all travel restrictions

Some provinces are advising to wear masks in public spaces

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# CONSUMER TRAVEL SENTIMENT

- Travel is more important for people than pre-pandemic
- Usage of loyalty programs significant
- Bucket list trips, solo travellers
- 90% of travelers looking for sustainable options: adventure, sport, eco-tourism, health and wellness
- Experiential & culture
- Extended Stays



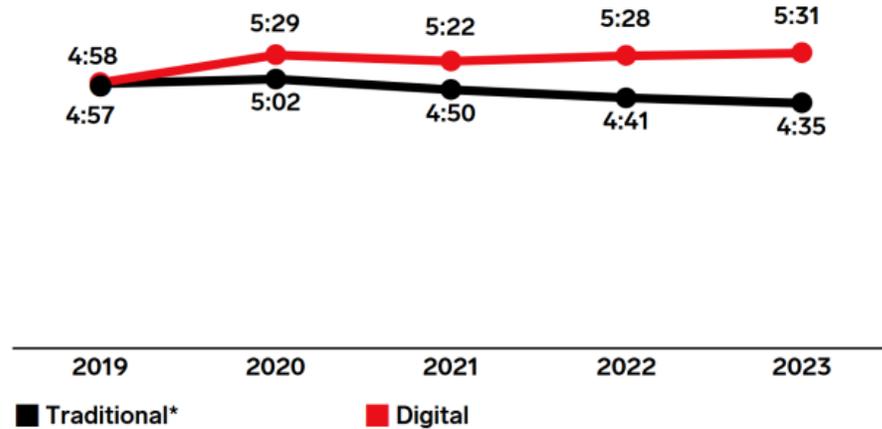
# TRAVEL TRADE TRENDS

- Relying on a travel agent
- Flexibility when booking
- Higher spent in travel than pre-pandemic
- Looking for added value
- Multi generational travel
- Sustainable, responsible travel



## Traditional\* vs. Digital Media: Average Time Spent in Canada, 2019-2023

hrs:mins per day among population



Note: ages 18+; time spent with each medium includes all time spent with each medium regardless of multitasking; \*includes time spent on TV, newspapers, magazines, and radio

Source: eMarketer, April 2021

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eMarketer | InsiderIntelligence.com

# MEDIA TRENDS

## Average Time Spent with Media in Canada, by Media, 2019-2023

hrs:mins per day among population

	2019	2020	2021	2022	2023
<b>Digital</b>	<b>4:58</b>	<b>5:29</b>	<b>5:22</b>	<b>5:28</b>	<b>5:31</b>
— Mobile (nonvoice)	3:09	3:31	3:31	3:37	3:42
— Smartphone	2:13	2:33	2:32	2:39	2:43
— Tablet	0:55	0:57	0:58	0:58	0:58
— Desktop/laptop*	1:50	1:58	1:51	1:50	1:49
<b>TV**</b>	<b>3:06</b>	<b>3:20</b>	<b>3:06</b>	<b>2:59</b>	<b>2:55</b>
<b>Radio**</b>	<b>1:31</b>	<b>1:25</b>	<b>1:26</b>	<b>1:25</b>	<b>1:23</b>
<b>Print**</b>	<b>0:20</b>	<b>0:17</b>	<b>0:18</b>	<b>0:17</b>	<b>0:17</b>
— Newspapers	0:16	0:14	0:14	0:14	0:13
— Magazines	0:04	0:04	0:04	0:04	0:04
<b>Total</b>	<b>9:55</b>	<b>10:31</b>	<b>10:12</b>	<b>10:08</b>	<b>10:07</b>

Note: ages 18+; includes digital (desktop/laptop and mobile nonvoice), print (magazines and newspapers), radio, and TV; includes all time spent with each medium, regardless of multitasking; \*includes all internet activities on desktop, laptop computers and other nonmobile devices; \*\*excludes digital

Source: eMarketer, April 2021

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# AIR CAPACITY

Annual capacity similar to 2019

	<b>2019</b>	<b>2022p</b>	<b>Change</b>
Scheduled non-stop seats	484,613	490,467	1.2%

	<b>2019 Jan-June</b>	<b>2023p Jan-June</b>	<b>Change</b>
Scheduled non-stop seats	306,686	279,345	-8.9%

<b>Airline</b>	<b>Non-stop seats scheduled 2022p (HNL,OGG,KOA,LIH)</b>
Air Canada	226,389
WestJet	260,826

# COMPETITION

Share of arrivals and recovery Index by sub-region (YTD)

	2019	2022	% change (2022 vs 2019)	Recovery Index (2022 share of 2019)
<b>Oceania</b>	192,288	58,485	-69.6	30.4
<b>Southeast Asia</b>	683,646	165,639	-75.8	24.0
<b>Caribbean, Central America &amp; Mexico</b>	4,203,877	2,353,543	-56	44
<b>Hawai'i</b>	293,616	215,374	-26.6	73.4

# CHALLENGES & OPPORTUNITIES

## Challenges

Increasing hotel taxes

Perceived high resort fees

Competition investment in Canadian market

Resident sentiment

Transportation options

Inflation

## Opportunities

Great connectivity with Canada

Safe destination

Canadians owning real estate

Repeat destination

Mālama Hawai'i Program

Cruises



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