



## 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 2022, the focus continues to be on promoting the Hawaiian culture and Hawaiian values as the differentiator to other destinations 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 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$792.0 million
Primary Purpose of Stay:	Pleasure (317,594) vs. MCI (13,556)
Average Length of Stay:	12.34 days
First Time Visitors:	33.0%
Repeat Visitors:	67.0%

CANADA MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	876.2	792.0	143.6	451.4%
Visitor Days	6,554,493	2,265,568	1,364,326	4,802,897	4,214,623	819,806	414.1%
Arrivals	540,103	164,393	87,900	379,885	341,508	51,259	566.2%
Average Daily Census	17,958	6,190	3,738	13,159	12,619	2,455	414.1%
Per Person Per Day Spending (\$)	165.0	NA	176.4	182.4	187.9	175.2	7.3%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,306.4	2,319.2	2,802.2	-17.2%
Length of Stay (days)	12.14	13.78	15.52	12.64	12.34	15.99	-22.8%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 3, 2022).

### Contact Information

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<sup>1/</sup> 2022 visitor data are preliminary. 2021, 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.

## Market Summary

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Prior to the COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first 11 months of 2022 there were 341,508 visitors from Canada compared to 475,922 visitors (-28.2%) in the first 11 months of 2019.
- Visitors from Canada spent \$792.0 million in the first 11 months of 2022, compared to \$951.9 million (-16.8%) in the first 11 months of 2019.
- There were 2,133 scheduled flights with 423,733 seats in the first 11 months of 2022, compared to 2,243 flights (-4.9%) with 424,534 seats (-0.2%) in the first 11 months of 2019.
- For all of 2021, 87,900 visitors arrived from Canada. In comparison, there were 164,393 visitors (-46.5%) from Canada in 2020, and 540,103 visitors (-83.7%) in 2019.
- Total visitor spending in 2021 was \$240.6 million, a decrease of 77.8 percent from \$1.08 billion in 2019. Comparative 2020 visitor spending data was not available.
- In 2021, there were 610 scheduled flights with 129,098 seats from Canada. In comparison, there were 876 flights with 177,913 seats in 2020, and 2,545 flights with 484,613 seats in 2019.

## Market Conditions

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- Growth in real GDP is projected to slow from 3.2 percent this year to 1 percent in 2023 before strengthening to 1.3 percent in 2024. Higher borrowing costs will weigh on consumer spending while export growth moderates in the near term amid deteriorating conditions abroad.
- Labor markets have been tight until recently but hiring will decline with slower output growth. Wage growth will moderate as the unemployment rate settles slightly above pre-pandemic levels. Inflation will converge on target as underlying cost drivers ease and remaining supply bottlenecks clear.
- Large interest rate rises this year will help check excess demand and tame inflationary pressures. The pace of monetary tightening should slow if labor markets show signs of deteriorating. Living-cost relief is weighing on fiscal balances in 2022.
- Although inflation is stabilizing, the expedited price hikes over the summer months pushed the Index of Consumer Confidence down to 65 points in November 2022, the lowest rating since May 2020.
- The loonie averaged US \$0.78 during the period, compared to US \$0.752 in 2019.
- A little more than 15.4 million Canadians returned home from an overnight trip to the U.S. and other destinations throughout the first three quarters of 2022. This was six and a half times the volume recorded in 2021, and represents 60 percent of activity during the same period in 2019.

- Destinations in Europe and the UK saw 3.4 million Canadian arrivals throughout the first three quarters of 2022. Following a relatively busy summer season, Canadian arrivals in the region now represent two-thirds of pre-pandemic activity (67%).
- There were 436 thousand Canadian arrivals in the Asia-Pacific region throughout the first three quarters of 2022. Activity in the region now represents just 17.5 percent of the volume recorded during the same period in 2019. Visits to India and the Philippines account for more than half of the activity recorded so far this year.
- Expedia Group's 2023 Traveler Value Index contains some encouraging news for Canadian travel advisors. Consumers in Canada, alongside Western Europe, are the most likely to travel internationally next year. 41 percent of Canadians say they are very likely to book or have already booked an international trip in the next 12 months, ranking higher than the global average of 30 percent.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
O'ahu	227,491	66,240	36,660	161,903	20,643	684.3%
Maui County	278,589	75,634	45,458	169,946	26,918	531.3%
Maui	276,825	74,974	45,149	168,484	26,727	530.4%
Moloka'i	4,840	1,042	316	1,715	259	562.9%
Lāna'i	5,700	1,602	699	3,907	312	1151.2%
Kaua'i	76,777	22,958	7,660	37,281	4,746	685.6%
Island of Hawai'i	97,711	36,732	12,954	55,590	7,408	650.4%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	191,476	102,266	60,676	132,797	487,215	10,232	848	12,910	105,108	129,098	1771.3	11959.7	370.0	26.3	277.4
Calgary	48,406	16,205	0	15,881	80,492	7,100	848	0	2,414	10,362	581.8	1811.0	0	557.9	676.8
Edmonton	2,784	696	0	1566	5,046	0	0	0	0	0	NA	NA	0	0	NA
Montreal	894	0	0	0	894	0	0	0	0	0	NA	0	0	0	NA
Toronto	12,218	5,619	0	0	21,413	0	0	0	2,980	2,980	NA	NA	0	20.0	618.6
	127,174	79,746	60,676	0	379,370	3,132	0	12,910	99,714	115,756	3960.5	NA	370.0	12.1	227.7

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of December 21, 2022, subject to change.

Scheduled flights	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	860	524	354	735	2,473	49	5	75	481	610	1655.1	10380.0	372.0	52.8	305.4
Calgary	243	83	0	63	389	31	5	0	8	44	683.9	1560.0	0	687.5	784.1
Edmonton	16	4	0	9	29	0	0	0	0	0	NA	NA	0	0	NA
Montreal	3	0	0	0	3	0	0	0	0	0	NA	0	0	0	NA
Toronto	41	19	0	12	72	0	0	0	10	10	NA	NA	0	20.0	620.0
	557	418	354	651	1,980	18	0	75	463	556	2994.4	NA	372.0	40.6	256.1

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of December 21, 2022, subject to change.

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

CANADA MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	8,494	NA	667	5,043	450	1020.4%
True Independent (Net)	437,503	NA	79,122	285,243	46,880	508.5%
Leisure vs Business						
Pleasure (Net)	509,578	153,536	81,112	317,594	46,145	588.2%
MCI (Net)	17,464	6,485	1,280	13,556	859	1478.9%
Convention/Conf.	10,668	4,842	405	6,120	211	2805.3%
Corp. Meetings	3,072	856	348	4,745	309	1434.9%
Incentive	4,054	995	562	3,094	374	727.3%

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	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
First Time Visitors (%)	35.4	NA	24.8	33.0	25.0	7.9
Repeat Visitors (%)	64.6	NA	75.2	67.0	75.0	-7.9

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	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	28.09	91.87	16.77	448.0%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).