



## 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 December 2022 Quick Facts<sup>1/</sup>

|                          |                                     |
|--------------------------|-------------------------------------|
| Visitor Expenditures:    | \$928.2 million                     |
| Primary Purpose of Stay: | Pleasure (372,996) vs. MCI (14,489) |
| Average Length of Stay:  | 12.32 days                          |
| First Time Visitors:     | 32.6%                               |
| Repeat Visitors:         | 67.4%                               |

| CANADA MMA (by Air)                 | 2019      | 2020      | 2021      | 2022 Annual Forecast* | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|-------------------------------------|-----------|-----------|-----------|-----------------------|----------------|---------------|--------------|
| Visitor Expenditures* (\$ Millions) | 1,081.5   | NA        | 240.6     | 876.2                 | 928.2          | 240.6         | 285.8%       |
| Visitor Days                        | 6,554,493 | 2,265,568 | 1,364,326 | 4,802,897             | 4,928,356      | 1,364,326     | 261.2%       |
| Arrivals                            | 540,103   | 164,393   | 87,900    | 379,885               | 399,869        | 87,900        | 354.9%       |
| Average Daily Census                | 17,958    | 6,190     | 3,738     | 13,159                | 13,502         | 3,738         | 261.2%       |
| Per Person Per Day Spending (\$)    | 165.0     | NA        | 176.4     | 182.4                 | 188.3          | 176.4         | 6.8%         |
| Per Person Per Trip Spending (\$)   | 2,002.4   | NA        | 2,737.5   | 2,306.4               | 2,321.3        | 2,737.5       | -15.2%       |
| Length of Stay (days)               | 12.14     | 13.78     | 15.52     | 12.64                 | 12.32          | 15.52         | -20.6%       |

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 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 had a negative COVID pre-travel test. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights through June 11, 2022 were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel. This requirement was lifted on June 12, 2022.

- For all of 2022, there were 399,869 visitors from Canada compared to 540,103 visitors (-26.0%) in 2019.
- Visitors from Canada spent \$928.2 million in 2022, compared to \$1.08 billion (-14.2%) in 2019. Daily visitor spending in 2022 rose to \$188 per person from \$165 per person (+14.1%) in 2019.
- In 2022, there were 2,473 scheduled flights and 487,215 seats from Canada compared to 2,545 flights (-2.8%) and 484,613 seats (+0.5%) in 2019.
- In 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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- The Canadian economy had a good third quarter 2022, recording roughly 3 percent growth. This caught many including the Bank of Canada, off-guard and extends an impressive streak of above-trend economic growth.
- Near-term spending is likely to be boosted following another jump in employment. However high inflation and rising interest rates will increasingly take their natural course of action on cooling demand into 2023.
- Relative to last quarter's forecast, consumer spending growth for 2023 has been downgraded by 0.7 percentage points marking a larger decline in goods spending and a more pronounced slowing in services.
- The unemployment rate outlook reflects a peak of 6.5 percent that corresponds to 110 thousand job losses. There is a risk that Canadian employers may go further although the job market reflects tightness based on vacancy rates and low unemployment rates.
- The loonie averaged US \$0.775 so far in 2022, compared to US \$0.753 in 2019.

- Through October 2022, nearly 17.5 million Canadians returned home from an overnight trip to the U.S. and other destinations. This was almost six times the volume recorded in 2021, and represents 62 percent of activity pre-pandemic (2019). October saw transborder trips reach the same volume of arrivals as recorded in 2019, while overseas arrivals reached 58 percent of 2019 activity.
- More than 11.5 million Canadians returned home from an overnight transborder trip throughout the first ten months of 2022, eight times the volume recorded last year. Auto travel accounted for 51 percent of trips during the period, a smaller share than in 2019 (56%). So far this year, transborder activity has reached 67 percent of the volume recorded in 2019.
- Destinations in the Caribbean, Mexico, and Central America reported 2.6 million arrivals from Canada throughout the first ten months of 2022. This represents 58 percent of the activity recorded in 2019, with Mexico (65%) and places in Central America (67%) experiencing faster rates of recovery.
- Destinations in Europe and the UK saw 3.97 million Canadian arrivals throughout the first ten months of 2022. Following a relatively strong summer season, Canadian arrivals in the region now represent 69 percent of pre-pandemic activity.
- From January to November 2022, scheduled Hawai'i capacity reached 424 thousand seats, the same volume of seats as offered in 2019. Compared to 2019, Air Canada has offered 36 thousand more seats (22%) while WestJet offered 37 thousand fewer seats (-14%).

## Distribution by Island

| CANADA MMA (by Air) | 2019    | 2020   | 2021   | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------|---------|--------|--------|----------------|---------------|--------------|
| O'ahu               | 227,491 | 66,240 | 36,660 | 188,741        | 36,660        | 414.8%       |
| Maui County         | 278,589 | 75,634 | 45,458 | 197,998        | 45,458        | 335.6%       |
| Maui                | 276,825 | 74,974 | 45,149 | 196,139        | 45,149        | 334.4%       |
| Moloka'i            | 4,840   | 1,042  | 316    | 2,064          | 316           | 553.4%       |
| Lāna'i              | 5,700   | 1,602  | 699    | 4,746          | 699           | 578.9%       |
| Kaua'i              | 76,777  | 22,958 | 7,660  | 44,615         | 7,660         | 482.5%       |
| Island of Hawai'i   | 97,711  | 36,732 | 12,954 | 66,548         | 12,954        | 413.7%       |

## 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  |

| 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 Dec.<br>2022P | YTD Dec.<br>2021 | % Change<br>YTD |
|---------------------------------|---------|---------|--------|-------------------|------------------|-----------------|
| Group vs True Independent (Net) |         |         |        |                   |                  |                 |
| Group Tour                      | 8,494   | NA      | 667    | 5,444             | 667              | 716.6%          |
| True Independent (Net)          | 437,503 | NA      | 79,122 | 334,479           | 79,122           | 322.7%          |
| Leisure vs Business             |         |         |        |                   |                  |                 |
| Pleasure (Net)                  | 509,578 | 153,536 | 81,112 | 372,996           | 81,112           | 359.9%          |
| MCI (Net)                       | 17,464  | 6,485   | 1,280  | 14,489            | 1,280            | 1031.8%         |
| Convention/Conf.                | 10,668  | 4,842   | 405    | 6,722             | 405              | 1558.1%         |
| Corp. Meetings                  | 3,072   | 856     | 348    | 4,947             | 348              | 1323.4%         |
| Incentive                       | 4,054   | 995     | 562    | 3,230             | 562              | 474.3%          |

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 Dec.<br>2022P | YTD Dec.<br>2021 | % Change<br>YTD |
|-------------------------|------|------|------|-------------------|------------------|-----------------|
| First Time Visitors (%) | 35.4 | NA   | 24.8 | 32.6              | 24.8             | 7.8             |
| Repeat Visitors (%)     | 64.6 | NA   | 75.2 | 67.4              | 75.2             | -7.8            |

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 Dec.<br>2022P | YTD Dec.<br>2021 | % Change<br>YTD |
|---|--------|------|-------|-------------------|------------------|-----------------|
| State tax revenue generated (\$ Millions) <sup>2/</sup> | 126.24 | NA   | 28.09 | 107.67            | 28.09            | 283.4%          |

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