



Canada Fact Sheet

Canada Overview

VoX International Inc. is contracted by HTA for Brand Marketing Management Services in Canada. 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 2023, 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.

January 2023 Quick Facts^{1/}

Visitor Expenditures:	\$154.4 million
Primary Purpose of Stay:	Pleasure (50,997) vs. MCI (3,961)
Average Length of Stay:	13.28 days
First Time Visitors:	31.3%
Repeat Visitors:	68.7%

	2019	2020	2021	2022P	2022 Annual Forecast*	Jan. 2023P	Jan. 2022P	% Change
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	928.2	876.2	154.4	69.5	122.2%
Visitor Days	6,554,493	2,265,568	1,364,326	4,928,356	4,802,897	750,117	389,407	92.6%
Arrivals	540,103	164,393	87,900	399,869	379,885	56,501	23,551	139.9%
Average Daily Census	17,958	6,190	3,738	13,502	13,159	24,197	12,562	92.6%
Per Person Per Day Spending (\$)	165.0	NA	176.4	188.3	182.4	205.9	178.5	15.3%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,321.3	2,306.4	2,733.1	2,950.9	-7.4%
Length of Stay (days)	12.14	13.78	15.52	12.32	12.64	13.28	16.53	-19.7%

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).

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^{1/} 2023 and 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

- In January 2023, 56,501 visitors arrived from Canada, compared to 23,551 visitors (+139.9%) in January 2022, and 69,687 visitors (-18.9%) in January 2019, prior to the COVID-19 global pandemic. Visitors from Canada spent \$154.4 million in January 2023, compared to \$69.5 million (+122.2%) in January 2022 and \$165.4 million (-6.7%) in January 2019. Daily spending by Canadian visitors in January 2023 (\$206 per person) increased significantly, compared to January 2022 (\$178 per person, +15.3%) and January 2019 (\$167 per person, +23.3%).
- In January 2023, there were 358 scheduled flights with 66,556 seats from Canada. Air capacity increased from January 2022 (266 flights, +34.6%, with 60,041 seats +10.9%) but declined compared to January 2019 (403 flights, -11.2% with 72,049 seats, -7.6%).
- In 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

- The Bank of Canada's tightening monetary policy is working. The national inflation rate fell to 6.3 percent in December 2022 and will continue to fall as interest rate hikes work their way through the economy.
- The index of consumer confidence increased to 74.1 points in January 2023, the highest level in four months.
- Canada's low unemployment (5%) rate bodes well for future incomes, and savings accumulated during the pandemic will continue to offer some cushion against rising debt costs.
- The Canadian dollar recently rose to its highest level in over two months against the U.S. dollar. The loonie averaged US \$0.772 during the Jan – Nov 2022 period, compared to US \$0.753 in 2019.
- More than 19.4 million Canadians returned home from an overnight trip to the U.S. and other destinations throughout January-November 2022. This was five times the volume recorded in 2021, and represents 64 percent of activity during the same period in 2019.
- Destinations in the Caribbean, Mexico, and Central America reported nearly 3.1 million arrivals from Canada throughout Jan-Nov 2022. This represents 62 percent of the activity recorded in 2019, with Mexico (69%) and places in Central America (70%) experiencing faster rates of recovery.

- Destinations in Europe and the UK saw more than 4.2 million Canadian arrivals throughout Jan-Nov 2022; 70 percent of the volume recorded in 2019.
- In total, 2022 had more direct seats from Canada than 2019 with an increase of 1.2 percent. For the first half of 2023, non-stop flights seats programmed from Canada are lower (-8.9%) than the same period in 2019.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
O'ahu	227,491	66,240	36,660	188,741	26,353	9,783	169.4%
Maui County	278,589	75,634	45,458	197,998	24,199	11,423	111.8%
Maui	276,825	74,974	45,149	196,139	24,070	11,278	113.4%
Moloka'i	4,840	1,042	316	2,064	305	239	27.8%
Lāna'i	5,700	1,602	699	4,746	403	185	117.9%
Kaua'i	76,777	22,958	7,660	44,615	6,252	2,671	134.1%
Island of Hawai'i	97,711	36,732	12,954	66,548	10,082	4,362	131.1%

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
Vancouver	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
Vancouver	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	2022P	Jan. 2023P	Jan. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	8,494	NA	667	5,444	1,056	120	776.8%
True Independent (Net)	437,503	NA	79,122	334,479	47,168	20,764	127.2%
Leisure vs Business							
Pleasure (Net)	509,578	153,536	81,112	372,996	50,997	21,542	136.7%
MCI (Net)	17,464	6,485	1,280	14,489	3,961	1,098	260.7%
Convention/Conf.	10,668	4,842	405	6,722	3,085	907	240.3%
Corp. Meetings	3,072	856	348	4,947	288	133	116.7%
Incentive	4,054	995	562	3,230	691	114	503.6%

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	2022P	Jan. 2023P	Jan. 2022P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.6	31.3	20.6	10.7
Repeat Visitors (%)	64.6	NA	75.2	67.4	68.7	79.4	-10.7

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	2022P	Jan. 2023P	Jan. 2022P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	107.67	17.91	8.11	120.8%

^{2/}State government tax revenue generated (direct, indirect, and induced).