



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.

Year-to-date March 2023 Quick Facts^{1/}

Visitor Expenditures:	\$464.1 million
Primary Purpose of Stay:	Pleasure (162,683) vs. MCI (8,876)
Average Length of Stay:	12.29 days
First Time Visitors:	30.3%
Repeat Visitors:	69.7%

	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Mar. 2023P	YTD Mar. 2022P	% Change
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	928.2	1,130.50	464.1	264.3	75.6%
Visitor Days	6,554,493	2,265,568	1,364,326	4,928,356	5,716,654	2,159,828	1,502,383	43.8%
Arrivals	540,103	164,393	87,900	399,869	461,829	175,738	107,072	64.1%
Average Daily Census	17,958	6,190	3,738	13,502	15,662	23,998	16,693	43.8%
Per Person Per Day Spending (\$)	165.0	NA	176.4	188.3	197.8	214.9	175.9	22.1%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,321.3	2,447.9	2,640.7	2,468.5	7.0%
Length of Stay (days)	12.14	13.78	15.52	12.32	12.38	12.29	14.03	-12.4%

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) 2023 annual forecast (Quarter 1, 2023).

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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 the first quarter of 2023, there were 175,738 visitors from Canada, compared to 107,072 visitors (+64.1%) in the first quarter of 2022, and 213,190 visitors (-17.6%) in the first quarter of 2019, prior to the COVID-19 pandemic.
- Visitors from Canada spent \$464.1 million in the first quarter of 2023, compared to \$264.3 million (+75.6%) in the first quarter of 2022, and \$458.3 million (+1.3%) in the first quarter of 2019. Daily visitor spending in the first quarter of 2023 increased to \$215 per person, from \$176 per person (+22.1%) in the first quarter of 2022, and \$169 per person (+27.1%) in the first quarter of 2019.
- In the first quarter of 2023, there were 1,051 scheduled flights with 195,687 seats from Canada. Air capacity increased compared to the first quarter of 2022 (860 flights, +22.2%, with 191,476 seats +2.2%), but declined compared to the first quarter of 2019 (1,167 flights, -9.9% with 211,342 seats, -7.4%).
- 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

- Growth in real GDP is projected to slow from 3.2 percent in 2022 to 1.0 percent in 2023 before strengthening to 1.3 percent in 2024 according to the OECD.
- Strength in Canada's resources sectors has helped offset slower growth in services. Industry GDP data suggest activity has cooled after an earlier post-pandemic rebound in hard-hit sectors including travel and accommodation.
- Canada's remoteness from hard-hit European markets and its domestic oil and gas capacity continue to help shield the country from high economic pressures arising from Russia's war of aggression against Ukraine. Energy price rises have been lower than in Europe. Lower oil prices have helped to reduce consumer price inflation from its peaks earlier in the year.
- The index of consumer confidence was 75.7 points in March 2023, the highest rating since summer 2022. The share of respondents to the Conference Board of Canada's survey who think it is a good time to purchase large-ticket items also increased slightly, but at 10.7 percent, remains well below pre-pandemic levels.
- The first month of 2023 saw 2.5 million Canadians return home from an overnight trip to the U.S. and other destinations; 91 percent of the activity recorded in January 2019.

- Almost 1.7 million Canadians returned home from an overnight transborder trip in January 2023, nearly four times the volume recorded in 2022 and a 19 percent increase compared to 2019. While trips by air increased significantly, auto travel was down 9 percent versus 2019.
- Compared to 2019, Air Canada offered the same volume of seats, while there were 6 thousand fewer seats offered by WestJet (-14%).
- With economic factors slowing down travel activity, the winter season (Nov-Apr) is currently projected to record 315 thousand arrivals, compared to over 393 thousand in 2018-19 (-20%) according to the Conference Board of Canada.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
O'ahu	227,491	66,240	36,660	188,741	83,639	46,755	78.9%
Maui County	278,589	75,634	45,458	197,998	76,954	49,386	55.8%
Maui	276,825	74,974	45,149	196,139	76,413	49,079	55.7%
Moloka'i	4,840	1,042	316	2,064	919	633	45.2%
Lāna'i	5,700	1,602	699	4,746	1,304	864	51.1%
Kaua'i	76,777	22,958	7,660	44,615	18,965	10,945	73.3%
Island of Hawai'i	97,711	36,732	12,954	66,548	30,997	17,553	76.6%

Airlift: Scheduled Seats and Flights

Scheduled seats	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	195,687	83,042	61,084	145,961	485,774	191,476	102,266	60,676	132,797	487,215	2.2	-18.8	0.7	9.9	-0.3
Calgary	37,960	9,044		20,830	67,834	48,406	16,205		15,881	80,492	-21.6	-44.2		31.2	-15.7
Edmonton	4,698	870		1740	7,308	2,784	696		1566	5,046	68.8	25.0		11.1	44.8
Montreal						894				894	-100.0				-100.0
Toronto	10,430	1,490		3,315	15,235	12,218	5,619		3,576	21,413	-14.6	-73.5		-7.3	-28.9
Vancouver	142,599	71,638	61,084	120,076	395,397	127,174	79,746	60,676	111,774	379,370	12.1	-10.2	0.7	7.4	4.2

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	1,051	465	356	815	2,687	860	524	354	735	2,473	22.2	-11.3	0.6	10.9	8.7
Calgary	158	38		93	289	243	83		63	389	-35.0	-54.2		47.6	-25.7
Edmonton	27	5		10	42	16	4		9	29	68.8	25.0		11.1	44.8
Montreal						3				3	-100.0				-100.0
Toronto	35	5		13	53	41	19		12	72	-14.6	-73.7		8.3	-26.4
Vancouver	831	417	356	699	2,303	557	418	354	651	1,980	49.2	-0.2	0.6	7.4	16.3

Source: DBEDT analysis from Diio Mi flight schedules as of March 21, 2023, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	8,494	NA	667	5,444	3,415	1,191	186.7%
True Independent (Net)	437,503	NA	79,122	334,479	142,800	92,907	53.7%
Leisure vs Business							
Pleasure (Net)	509,578	153,536	81,112	372,996	162,683	100,273	62.2%
MCI (Net)	17,464	6,485	1,280	14,489	8,876	3,483	154.9%
Convention/Conf.	10,668	4,842	405	6,722	5,172	2,381	117.2%
Corp. Meetings	3,072	856	348	4,947	1,129	501	125.1%
Incentive	4,054	995	562	3,230	2,822	695	306.2%

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	YTD Mar. 2023P	YTD Mar. 2022P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.6	30.3	21.6	8.7
Repeat Visitors (%)	64.6	NA	75.2	67.4	69.7	78.4	-8.7

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	YTD Mar. 2023P	YTD Mar. 2022P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	107.67	53.83	30.85	74.5%

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