



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

Visitor Expenditures:	\$264.3 million
Primary Purpose of Stay:	Pleasure (100,273) vs. MCI (3,483)
Average Length of Stay:	14.03 days
First Time Visitors:	21.6%
Repeat Visitors:	78.4%

	2019	2020	2021P	2022 Annual Forecast*	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	238.4	426.6	264.3	18.3	1345.3%
Visitor Days	6,554,493	2,265,568	1,338,526	2,457,615	1,502,383	109,574	1271.1%
Arrivals	540,103	164,393	86,491	194,619	107,072	3,716	2781.3%
Average Daily Census	17,958	6,190	3,667	6,733	16,693	1,217	1271.1%
Per Person Per Day Spending (\$)	165.0	NA	178.1	173.6	175.9	166.9	5.4%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,756.1	2,192.2	2,468.5	4,921.3	-49.8%
Length of Stay (days)	12.14	13.78	15.48	12.63	14.03	29.49	-52.4%

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) 2022 annual forecast (Quarter 1, 2022).

### Contact Information

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

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## **Market Summary**

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Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. Due to concerns about the rapid surge of COVID cases worldwide and the limitations of Hawai'i's health care system, on March 17, 2020 Hawai'i Gov. David Ige asked visitors to postpone their trips for at least 30 days. The counties also began issuing stay-at-home orders. On March 26, 2020, the state implemented a 14-day mandatory travel quarantine. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. This continued until mid-October 2020, when the state initiated the Safe Travels program, which allowed trans-Pacific travelers to bypass the quarantine if they had a valid negative test for COVID-19.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. 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 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, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

- Through the first quarter of 2022, there were 107,072 visitors from Canada, compared to 213,190 visitors (-49.8%) in the first quarter of 2019.
- Visitors from Canada spent \$264.3 million in the first quarter of 2022, compared to \$458.3 billion (-42.3%) in the first quarter of 2019.
- There were 860 scheduled flights with 191,476 seats in the first quarter of 2022, compared to 1,167 flights with 211,342 seats in the first quarter of 2019.
- For all of 2021, 86,491 visitors arrived from Canada. In comparison, there were 164,393 visitors (-47.4%) from Canada in 2020, and 540,103 visitors (-84.0%) in 2019.
- Total visitor spending in 2021 was \$238.4 million, a decrease of 78.0 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

- Canada's economy is projected to expand 4.4 percent in 2022.
- Job growth was concentrated in Ontario and Quebec, which together accounted for over 80 percent of the employment growth. Employment also rose in all other provinces, except New Brunswick, where there was little change.
- After dropping 7.6 points in February 2022, the Index of Consumer Confidence rose 2.2 points in March 2022. Canadians continue to be optimistic about future employment prospects but are concerned about current and future finances. In addition, reluctance surrounding major purchases remains with just 15.7 percent of survey respondents thinking it is a good time to buy large-ticket items. That said, the easing of mandates and restrictions should lead to improved optimism going forward as consumers begin to feel a degree of normalcy and slowly start to change their consumption patterns.
- The loonie posted an average value of USD \$0.80 in 2021, a 9 percent increase over 2020 and the highest annual average recorded since 2014.
- On April 1, the Government of Canada officially dropped its pre-entry COVID-19 testing requirements for all fully vaccinated travelers entering the country. Travel advisors say the changes have boosted consumer confidence after two years of pandemic-related border closures and lockdowns and they are seeing a surge in new bookings.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
O'ahu	227,491	66,240	36,825	46,755	1,110	4112.7%
Maui County	278,589	75,634	43,904	49,386	2,125	2224.6%
Maui	276,825	74,974	43,586	49,079	2,118	2217.8%
Moloka'i	4,840	1,042	321	633	6	10713.6%
Lāna'i	5,700	1,602	686	864	29	2897.5%
Kaua'i	76,777	22,958	7,576	10,945	53	20683.0%
Island of Hawai'i	97,711	36,732	12,892	17,553	620	2732.8%

## 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
<b>CANADA</b>	<b>191,476</b>	<b>102,266</b>	<b>60,676</b>	<b>132,401</b>	<b>486,819</b>	<b>10,232</b>	<b>848</b>	<b>12,910</b>	<b>105,108</b>	<b>129,098</b>	<b>1771.3</b>	<b>11959.7</b>	<b>370.0</b>	<b>26.0</b>	<b>277.1</b>
Calgary	48,406	16,205	0	12,009	76,620	7,100	848	0	2,414	10,362	581.8	1811.0	NA	397.5	639.4
Edmonton	2,784	696	0	1566	5,046	0	0	0	0	0	NA	NA	NA	NA	NA
Montreal	894	0	0	0	894	0	0	0	0	0	NA	NA	NA	NA	NA
Toronto	12,218	5,619	0	2,040	19,877	0	0	0	2,980	2,980	NA	NA	NA	-31.5	567.0
	127,174	79,746	60,676	116,786	384,382	3,132	0	12,910	99,714	115,756	3960.5	NA	370.0	17.1	232.1

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of April 26, 2022, subject to change.

Scheduled flights	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>CANADA</b>	<b>860</b>	<b>524</b>	<b>354</b>	<b>748</b>	<b>2,486</b>	<b>49</b>	<b>5</b>	<b>75</b>	<b>481</b>	<b>610</b>	<b>1655.1</b>	<b>10380.0</b>	<b>372.0</b>	<b>55.5</b>	<b>307.5</b>
Calgary	243	83	0	52	378	31	5	0	8	44	683.9	1560.0	NA	550.0	759.1
Edmonton	16	4	0	9	29	0	0	0	0	0	NA	NA	NA	NA	NA
Montreal	3	0	0	0	3	0	0	0	0	0	NA	NA	NA	NA	NA
Toronto	41	19	0	8	68	0	0	0	10	10	NA	NA	NA	-20.0	580.0
	557	418	354	679	2,008	18	0	75	463	556	2994.4	NA	372.0	46.7	261.2

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of April 26, 2022, subject to change.

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

CANADA MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	635	1,191	16	7499.0%
True Independent (Net)	437,503	NA	76,891	92,907	3,557	2511.7%
Leisure vs business						
Pleasure (Net)	509,578	153,536	79,791	100,273	3,119	3114.8%
MCI (Net)	17,464	6,485	1,255	3,483	12	29746.6%
Convention/Conf.	10,668	4,842	399	2,381	0	NA
Corp. Meetings	3,072	856	342	501	10	5023.5%
Incentive	4,054	995	549	695	2	36809.5%

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	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
1st timers (%)	35.4	NA	24.8	21.6	20.3	1.3
Repeaters (%)	64.6	NA	75.2	78.4	79.7	-1.3

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.

## Tax Revenue

CANADA MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	27.83	30.66	2.13	1336.3%

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