



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 April 2022 Quick Facts^{1/}

Visitor Expenditures:	\$353.1 million
Primary Purpose of Stay:	Pleasure (140,455) vs. MCI (4,988)
Average Length of Stay:	13.26 days
First Time Visitors:	23.2%
Repeat Visitors:	76.8%

	2019	2020	2021P	2022 Annual Forecast*	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	238.4	426.6	353.1	20.1	1652.7%
Visitor Days	6,554,493	2,265,568	1,338,526	2,457,615	1,991,678	121,866	1534.3%
Arrivals	540,103	164,393	86,491	194,619	150,180	4,243	3439.5%
Average Daily Census	17,958	6,190	3,667	6,733	16,597	1,016	1534.3%
Per Person Per Day Spending (\$)	165.0	NA	178.1	173.6	177.3	165.3	7.2%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,756.1	2,192.2	2,351.3	4,748.5	-50.5%
Length of Stay (days)	12.14	13.78	15.48	12.63	13.26	28.72	-53.8%

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 1, 2022).

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^{1/} 2022 and 2021 visitor data are preliminary. 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIO 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

Prior to the global 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 April 2022, there were no travel restrictions for passengers arriving on U.S. domestic flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

- Through the first four months of 2022 there were 150,180 visitors from Canada compared to 269,939 visitors (-44.4%) in the first four months of 2019.
- Visitors from Canada spent \$353.1 million in the first four months of 2022, compared to \$558.4 million (-36.8%) in the first four months of 2019.
- There were 1,158 scheduled flights with 254,125 seats in the first four months of 2022, compared to 1,447 flights with 269,770 seats in the first four months 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. The preliminary estimate for March in real GDP growth is 0.5 percent. This would mean the Canadian economy grew by 1.4 percent in the first quarter of 2022, an impressive performance given the significant disruption caused by the Omicron variant.
- 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.
- 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.

- The Index of Consumer Confidence increased by 4.5 points in April 2022 to reach 99.8. A solid economic recovery from the Omicron variant and the quick rebound in the labor market have boosted economic activity and increased consumer confidence. Although consumers are experiencing higher prices, they are increasingly more confident about the economy. However, affordability and future finances remain a key concern. Only 17.3 percent of survey respondents believe now is a good time to make a big purchase - a large contrast with the average sentiment of 31 percent in 2019.
- Canadians are saving more than they were prior to the pandemic but they're spending less on non-essential items. There's a tremendous desire to travel internationally, Canadians have money sitting in bank accounts and pent-up demand is strong. According to Canada's Consumer Price Index report, Canadians are paying more for dining out, hotel rooms, and flights. In March 2022, prices for services rose 4.3 percent on a year-over-year basis, up from a 3.8 percent increase in February 2022, as public health measures across Canada continued to ease.
- On April 1, 2022 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 Apr. 2022P	YTD Apr. 2021P	% Change YTD
O'ahu	227,491	66,240	36,825	67,559	1,283	5166.6%
Maui County	278,589	75,634	43,904	68,826	2,374	2799.2%
Maui	276,825	74,974	43,586	68,357	2,366	2789.3%
Moloka'i	4,840	1,042	321	827	10	8001.2%
Lāna'i	5,700	1,602	686	1,284	40	3081.9%
Kaua'i	76,777	22,958	7,576	14,957	102	14634.0%
Island of Hawai'i	97,711	36,732	12,892	23,424	735	3087.1%

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	132,401	486,819	10,232	848	12,910	105,108	129,098	1771.3	11959.7	370.0	26.0	277.1
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
CANADA	860	524	354	748	2,486	49	5	75	481	610	1655.1	10380.0	372.0	55.5	307.5
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 Apr. 2022P	YTD Apr. 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	635	1,828	17	10850.8%
True Independent (Net)	437,503	NA	76,891	130,009	4,058	3103.8%
Leisure vs business						
Pleasure (Net)	509,578	153,536	79,791	140,455	3,503	3909.6%
MCI (Net)	17,464	6,485	1,255	4,988	15	33533.6%
Convention/Conf.	10,668	4,842	399	3,240	1	307277.2%
Corp. Meetings	3,072	856	342	621	12	5122.7%
Incentive	4,054	995	549	1,222	2	64811.2%

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	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
1st timers (%)	35.4	NA	24.8	23.2	20.7	2.5
Repeaters (%)	64.6	NA	75.2	76.8	79.3	-2.5

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.

Tax Revenue

CANADA MMA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	27.83	40.96	2.35	1641.8%

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