



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

Visitor Expenditures:	\$500.1 million
Primary Purpose of Stay:	Pleasure (201,275) vs. MCI (7,796)
Average Length of Stay:	12.64 days
First Time Visitors:	29.7%
Repeat Visitors:	70.3%

	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	426.6	500.1	30.3	1553.1%
Visitor Days	6,554,493	2,265,568	1,364,326	2,457,615	2,741,225	181,301	1412.0%
Arrivals	540,103	164,393	87,900	194,619	216,818	7,634	2740.1%
Average Daily Census	17,958	6,190	3,738	6,733	12,930	855	1412.0%
Per Person Per Day Spending (\$)	165.0	NA	176.4	173.6	182.4	166.9	9.3%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,192.2	2,306.4	3,962.5	-41.8%
Length of Stay (days)	12.14	13.78	15.52	12.63	12.64	23.75	-46.8%

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).

### Contact Information

**Hawai'i Tourism Authority:** Jadie Goo, Sr. Brand Manager  
 Tel: (808) 973-2252  
[jadie@gohta.net](mailto:jadie@gohta.net)

**Hawai'i Tourism Canada:** Lorenzo Campos, Account Director  
 Telephone: (416) 935-1896 ext. 229  
[lorenzo@voxinternational.com](mailto:lorenzo@voxinternational.com)

<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

---

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 July 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first seven months of 2022 there were 216,818 visitors from Canada compared to 342,474 visitors (-36.7%) in the first seven months of 2019.
- Visitors from Canada spent \$500.1 million in the first seven months of 2022, compared to \$692.9 million (-27.8%) in the first seven months of 2019.
- There were 1,508 scheduled flights with 315,008 seats in the first seven months of 2022, compared to 1,723 flights with 324,056 seats in the first seven of 2019.
- For all of 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 Canadian economy held steady in May 2022 as GDP growth remained essentially unchanged. The result marks a deceleration after three consecutive months of growth.
- Statistics Canada's preliminary estimate for real GDP growth in June 2022 is 0.1 percent. If correct, this would mark a modest Quarter 2 performance with the economy growing 1.1 percent in the previous quarter, powered largely by activity earlier in the spring.
- In the service economy, there were notable gains in the transportation and warehousing industry. Increased demand for passenger transportation, particularly air travel drove this increase. Elsewhere, GDP continued to rise in accommodation and food services (+1.9%) and arts, entertainment and recreation (+2.6%).
- With short-term financial concerns on the rise, the Index of Consumer Confidence fell to 72.8 points in July 2022, the lowest level recorded since the start of the pandemic. Although inflation is starting to decelerate, consumers are concerned about their purchasing power as one-third reported a pessimistic view of their current finances. Optimism regarding future finances and job prospects also fell in July, and just 11 percent of respondents believe now is a good time to make a large purchase.
- The average value of the loonie during in July 2022 was US \$0.79.

- As of July 31, 82.9 percent of total population are fully vaccinated with 86.3 percent received at least one additional dose.
- January-May 2022 saw almost 7.2 million Canadians return home from an overnight trip to the U.S. and other destinations. This was nine and a half times the volume recorded in 2021, and 50 percent of pre-pandemic activity.
- More than 4.3 million Canadians returned home from an overnight transborder trip during the first five months of 2022, eleven and a half times the volume recorded last year. Auto travel accounted for 47 percent of trips during the period, compared to 48 percent in 2019. Transborder activity so far in 2022 represents 53 percent of the volume recorded during the same period in 2019.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	227,491	66,240	36,660	104,230	2,890	3506.5%
Maui County	278,589	75,634	45,458	102,588	3,822	2583.9%
Maui	276,825	74,974	45,149	101,665	3,800	2575.2%
Moloka'i	4,840	1,042	316	1,152	37	3041.7%
Lāna'i	5,700	1,602	699	2,182	56	3788.6%
Kaua'i	76,777	22,958	7,660	21,588	417	5075.1%
Island of Hawai'i	97,711	36,732	12,954	33,581	1,446	2221.6%

## 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>128,529</b>	<b>482,947</b>	<b>10,232</b>	<b>848</b>	<b>12,910</b>	<b>105,108</b>	<b>129,098</b>	1771.3	11959.7	370.0	22.3	274.1
Calgary	48,406	16,205	0	11,671	76,282	7,100	848	0	2,414	10,362	581.8	1811.0	#DIV/0!	383.5	636.2
Edmonton	2,784	696	0	1,566	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	3,576	21,413	0	0	0	2,980	2,980	NA	NA	NA	20.0	618.6
	127,174	79,746	60,676	111,716	379,312	3,132	0	12,910	99,714	115,756	3960.5	#DIV/0!	370.0	12.0	227.7

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of June 24, 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>720</b>	<b>2,458</b>	<b>49</b>	<b>5</b>	<b>75</b>	<b>481</b>	<b>610</b>	1655.1	10380.0	372.0	49.7	303.0
Calgary	243	83	0	50	376	31	5	0	8	44	683.9	1560.0	NA	525.0	754.5
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	12	72	0	0	0	10	10	NA	NA	NA	20.0	620.0
	557	418	354	649	1,978	18	0	75	463	556	2994.4	#DIV/0!	372.0	40.2	255.8

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of June 24, 2022, subject to change.

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

CANADA MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	667	2,959	63	4578.8%
True Independent (Net)	437,503	NA	79,122	183,288	7,178	2453.3%
Leisure vs business						
Pleasure (Net)	509,578	153,536	81,112	201,275	6,212	3140.3%
MCI (Net)	17,464	6,485	1,280	7,796	67	11525.5%
Convention/Conf.	10,668	4,842	405	4,324	30	14318.8%
Corp. Meetings	3,072	856	348	1,318	32	4070.8%
Incentive	4,054	995	562	2,377	5	43271.2%

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	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	35.4	NA	24.8	29.7	25.6	4.1
Repeaters (%)	64.6	NA	75.2	70.3	74.4	-4.1

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 July 2022P	YTD July 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	28.09	58.01	3.53	1542.8%

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