



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 2021, the marketing strategy is focused on promoting the Hawaiian Culture and Hawaiian values as the big differentiator to any other beach destination 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 December 2021 Quick Facts^{1/}

Visitor Expenditures:	\$238.4 million
Primary Purpose of Stay:	Pleasure (79,791) vs. MCI (1,255)
Average Length of Stay:	15.48 days
First Time Visitors:	24.8%
Repeat Visitors:	75.2%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
CANADA MMA (by Air)							
Visitor Expenditures* (\$ Millions)	1,081.5	NA	NA	316.6	238.4	NA	NA
Visitor Days	6,554,493	2,265,568	-65.4%	1,741,978	1,338,526	2,265,568	-40.9%
Arrivals	540,103	164,393	-69.6%	101,032	86,491	164,393	-47.4%
Average Daily Census	17,958	6,190	-65.5%	4,773	3,667	6,190	-40.8%
Per Person Per Day Spending (\$)	165.0	NA	NA	181.7	178.1	NA	NA
Per Person Per Trip Spending (\$)	2,002.4	NA	NA	3,133.4	2,756.1	NA	NA
Length of Stay (days)	12.14	13.78	13.6%	17.24	15.48	13.78	12.3%

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.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2021).

Contact Information

Hawai'i Tourism Authority: Laci Goshi, Brand Manager
 Tel: (808) 973-2268
laci@gohta.net

^{1/} 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.

Hawai'i Tourism Canada: Lorenzo Campos, Account Director
VoX International
130 Queens Quay East, West Tower Suite 1200
Toronto, Ontario M5A 0P6
Telephone: (416) 935-1896 ext. 229
lorenzo@voxinternational.com

Market Summary

In December 2021, domestic passengers could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 viral test result taken within 24 hours of travel or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

In December 2021, Canadians were advised to avoid non-essential travel outside of Canada. Travelers were required to show a negative pre-arrival PCR test taken within 72 hours before entry into Canada, and submit their information into ArriveCAN. Fully vaccinated travelers were required to maintain a list of contacts for 14 days after entry to Canada. Unvaccinated travelers were required to quarantine for 14 days.

- For all of 2021, 86,491 visitors arrived from Canada, of which 70,210 visitors came on international flights while 16,281 came on domestic flights. In comparison, there were 164,393 visitors (-47.4%) from Canada in 2020, versus 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, versus 2,545 flights with 484,613 seats in 2019.
- Comparing 2021 vs. 2020, there was decreased air service from Vancouver (115,756 seats, -15.1%), Calgary (10,362, -67.9%) and Toronto (2,980, -68.3%).
- In 2020, arrivals decreased 69.6 percent to 164,393 visitors. Visitor days fell 65.4 percent. The average daily census was 6,190 visitors, down 65.5 percent compared to 2019.
- In 2020, scheduled air seats decreased 63.3 percent compared to last year.
- In 2019, spending by Canadian visitors dropped 2.4 percent to \$1.08 billion. Visitor arrivals (-1.6% to 540,103) and visitor days (-2.8%) decreased while daily visitor spending (+0.4% to \$165 per person) was slightly higher compared 2018. The average daily census was 17,958 visitors in 2019, a decrease of 2.8 percent compared to 2018.
- In 2019, scheduled air seats from Canada dropped slightly (-0.9%) compared to 2018.

Market Conditions

- Canada's economy is projected to expand 4.4 percent in 2022. This partly reflects the generally successful rollout of vaccines that has led to a gradual reopening of the economy.
- Canadian labor markets have largely recovered from the pandemic but pressures that existed pre-COVID have resumed and have been exacerbated. Evidence of labor shortages is now more widespread, spanning all levels of skilled occupations. The policy and market response can include growing the supply of labor: incenting older workers to stay in the workforce, to and beyond age 65, and bolstering our immigration intake of knowledge workers.
- Inflation is projected to moderate as production bottlenecks clear, before strengthening again as unemployment falls. More persistent supply constraints could, however, mean that inflation stays higher for longer and delay a projected acceleration in trade and consumer spending.
- As news of the Omicron variant spread, the Index of Consumer Confidence fell 7-points to 101.2 in December 2021. This was the second consecutive monthly decline and the lowest level recorded since April. The index is now 16 percent below its pre-pandemic level. Lower confidence levels were recorded across Canada, as the share of respondents with positive views regarding their purchasing power and future finances retreated. Just 18 percent of survey respondents believe now is a good time to make a major purchase.
- The loonie posted an average value of USD \$0.80 in 2021, a 9 percent increase over 2020.
- Canadian airlines are dealing with many employees out sick with the Omicron variant which has contributed to scheduled flights being cut back.

Distribution by Island

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
O'ahu	227,491	66,240	-70.9%	36,825	66,240	-44.4%
Maui County	278,589	75,634	-72.9%	43,904	75,634	-42.0%
Maui	276,825	74,974	-72.9%	43,586	74,974	-41.9%
Moloka'i	4,840	1,042	-78.5%	321	1,042	-69.2%
Lāna'i	5,700	1,602	-71.9%	686	1,602	-57.2%
Kaua'i	76,777	22,958	-70.1%	7,576	22,958	-67.0%
Island of Hawai'i	97,711	36,732	-62.4%	12,892	36,732	-64.9%

Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	10,232	848	12910	105108	129,098	164,881	0	0	13032	177,913	-93.8	NA	NA	706.5	-27.4
Calgary	7,100	848	0	2414	10,362	26,020	0	0	6224	32,244	-72.7	NA	NA	-61.2	-67.9
Edmonton	0	0	0	2980	2,980	9393	0	0	0	9,393	-100.0	NA	NA	NA	-68.3
Montreal	3,132	0	12910	99714	115,756	129,468	0	0	6808	136,276	-97.6	NA	NA	1364.7	-15.1
Toronto	10,232	848	12910	105108	129,098	164,881	0	0	13032	177,913	-93.8	NA	NA	706.5	-27.4
	7,100	848	0	2414	10,362	26,020	0	0	6224	32,244	-72.7	NA	NA	-61.2	-67.9

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of January 14, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	8,494	NA	NA	635	NA	NA
True Independent (Net)	437,503	NA	NA	76,891	NA	NA
Leisure vs business						
Pleasure (Net)	509,578	153,536	-69.9%	79,791	153,536	-48.0%
MCI (Net)	17,464	6,485	-62.9%	1,255	6,485	-80.6%
Convention/Conf.	10,668	4,842	-54.6%	399	4,842	-91.7%
Corp. Meetings	3,072	856	-72.1%	342	856	-60.1%
Incentive	4,054	995	-75.5%	549	995	-44.9%

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	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
1st timers (%)	35.4	NA	NA	24.8	NA	NA
Repeaters (%)	64.6	NA	NA	75.2	NA	NA

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	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	NA	27.83	NA	NA

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