



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 2024 Quick Facts^{1/}

Visitor Expenditures: \$430.5 million
 Primary Purpose of Stay: Pleasure (151,649) vs. MCI (9,480)
 Average Length of Stay: 11.88 days
 First Time Visitors: 29.5%
 Repeat Visitors: 70.5%

	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Mar. 2024P	YTD Mar. 2023P	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,171.8	1,107.75	430.5	464.1	-7.2%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,336,987	4,946,565	1,962,072	2,159,828	-9.2%
Arrivals	540,103	164,393	87,900	414,250	454,103	449,688	165,151	175,738	-6.0%
Average Daily Census	17,958	6,190	3,738	13,889	14,622	13,515	21,561	23,998	-10.2%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	219.6	223.9	219.4	214.9	2.1%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,580.4	2,463.4	2,606.5	2,640.7	-1.3%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.75	11.00	11.88	12.29	-3.3%

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.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 1, 2024).

Contact Information

Hawai'i Tourism Authority: Ross Willkom, Brand Manager
 Tel: (808) 973-2279
ross.willkom@gohta.net

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

^{1/} 2023 and 2024 visitor data are preliminary. 2019 - 2022 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 2024, there were 165,151 visitors from Canada, compared to 175,738 visitors (-6.0%) in the first quarter of 2023 and 213,190 visitors (-22.5%) in the first quarter of 2019. Visitors from Canada spent \$430.5 million in the first quarter of 2024, compared to \$464.1 million (-7.2%) in the first quarter of 2023 and \$458.3 million (-6.1%) in the first quarter of 2019.
- In the first quarter of 2024, 956 scheduled flights with 177,186 seats serviced Hawai'i from Canada. In the first quarter of 2023, there were 1,051 scheduled flights (-9.0%) with 195,687 seats (-9.5%). In the first quarter of 2019 there were 1,167 scheduled flights (-18.1%) with 211,342 seats (-16.2%).
- In 2023, there were 454,103 visitors from Canada, compared to 414,250 visitors (+9.6%) in 2022 and 540,103 visitors (-15.9%) in 2019.
- Visitors from Canada spent \$1.17 billion in 2023, compared to \$962.1 million (+21.8%) in 2022 and \$1.08 billion (+8.3%) in 2019. Daily visitor spending in 2023 increased to \$220 per person, from \$190 per person (+15.7%) in 2022 and \$165 per person (+33.1%) in 2019.
- In of 2023, there were 2,566 scheduled flights with 466,196 seats from Canada, compared to 2,473 flights (+3.8%) with 487,215 seats (-4.3%) in 2022 and 2,545 flights (+0.8%) with 484,613 seats (-3.8%) in 2019.

Market Conditions

- The index of Consumer Confidence rose again in March 2024 to 67.8 points, the fourth consecutive monthly increase. Although a small change, both current and future financial outlooks saw a decrease in pessimism. At the same time, the share of respondents that indicated optimism regarding future job prospects also gained ground. Although GDP growth at the end of 2023 was minimal, Canada avoided a recession, defined as two consecutive quarters of negative GDP growth. This likely contributed to the improvement in consumer outlook, but the positive news may also mute future gains in confidence if modest economic growth leads to softer-than-expected interest rate cuts.
- Economic growth in the fourth quarter of 2023 was better than expected, however, every component of demand in the domestic economy was weaker than forecast. Growth in 2024 reflects a small upgrade, but at roughly 1 percent is minimal.
- The average daily exchange rate for March 2024 was \$0.73.
- Overseas travel reached 98 percent of 2019 activity, while the volume of transborder trips surpassed pre-pandemic volume (6%).
- Unlike the U.S., the Canadian job market is expected to tip into net losses in the second half of 2024. Alongside healthy labor force growth, this would push the unemployment rate up further, to 6.7 percent by the end of this year. This is not a large swing relative to history. A more balanced job market should help take more steam out of wage growth and assist in cooling inflation.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	84,872	83,639	1.5%
Maui County	278,589	75,634	45,458	209,765	205,941	62,564	76,954	-18.7%
Maui	276,825	74,974	45,149	208,071	204,467	61,995	76,413	-18.9%
Moloka'i	4,840	1,042	316	2,259	2,777	1,122	919	22.1%
Lāna'i	5,700	1,602	699	5,680	3,882	765	1,304	-41.4%
Kaua'i	76,777	22,958	7,660	42,680	54,560	17,405	18,965	-8.2%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	30,093	30,997	-2.9%

Airlift: Scheduled Seats and Flights

Scheduled seats	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	177,186	76,394	45,302	130,882	429,764	195,687	82,694	56,426	131,389	466,196	-9.5	-7.6	-19.7	-0.4	-7.8
Calgary	31,548	9,026	4,524	16,530	61,628	37,960	9,044	0	19,468	66,472	-16.9	-0.2	NA	-15.1	-7.3
Edmonton	7,308	1,914		3,480	12,702	4,698	870		2,436	8,004	55.6	120.0		42.9	58.7
Toronto	11,195	0		2,040	13,235	10,430	1,490		3,278	15,198	7.3	-100.0		-37.8	-12.9
Vancouver	127,135	65,454	40,778	108,832	342,199	142,599	71,290	56,426	106,207	376,522	-10.8	-8.2	-27.7	2.5	-9.1

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	956	438	263	756	2,413	1,051	463	329	723	2,566	-9.0	-5.4	-20.1	4.6	-6.0
Calgary	136	46	26	95	303	158	38	0	80	276	-13.9	21.1	NA	18.8	9.8
Edmonton	42	11		20	73	27	5		14	46	55.6	120.0		42.9	58.7
Toronto	38	0		8	46	35	5		11	51	8.6	-100.0		-27.3	-9.8
Vancouver	740	381	237	633	1,991	831	415	329	618	2,193	-11.0	-8.2	-28.0	2.4	-9.2

Source: DBEDT analysis from Diio Mi flight schedules as of April 19, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,634	3,391	3,415	-0.7%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	133,974	142,800	-6.2%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	151,649	162,683	-6.8%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	9,480	8,876	6.8%
Convention/Conf.	10,668	4,842	405	6,654	13,094	6,119	5,172	18.3%
Corp. Meetings	3,072	856	348	5,265	2,611	2,122	1,129	88.0%
Incentive	4,054	995	562	3,308	4,583	1,795	2,822	-36.4%

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	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	29.5	30.3	-0.8
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	70.5	69.7	0.8

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	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	49.93	53.83	-7.2%

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