



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.

January 2024 Quick Facts^{1/}

Visitor Expenditures:	\$155.3 million
Primary Purpose of Stay:	Pleasure (47,877) vs. MCI (4,877)
Average Length of Stay:	12.81 days
First Time Visitors:	30.4%
Repeat Visitors:	69.6%

	2019	2020	2021	2022	2023P	2023 Annual Forecast*	Jan. 2024P	Jan. 2023P	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,171.8	1,154.29	155.3	154.4	0.5%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,336,987	5,217,132	691,708	750,117	-7.8%
Arrivals	540,103	164,393	87,900	414,250	454,103	434,761	54,002	56,501	-4.4%
Average Daily Census	17,958	6,190	3,738	13,889	14,622	14,294	22,313	24,197	-7.8%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	219.6	221.3	224.5	205.9	9.0%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,580.4	2,655.0	2,875.2	2,733.1	5.2%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.75	12.00	12.81	13.28	-3.5%

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) 2023 annual forecast (Quarter 4, 2023).

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^{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 January 2024, 54,002 visitors arrived from Canada, which was fewer than January 2023 (56,501 visitors, -4.4%) and pre-pandemic January 2019 (69,687 visitors, -22.5%).
- Visitors from Canada spent \$155.3 million in January 2024, compared to \$154.4 million (+0.5%) in January 2023 and \$165.4 million (-6.2%) in January 2019. Daily spending by Canadian visitors in January 2024 (\$224 per person) was more than January 2023 (\$206 per person, +9.0%) and January 2019 (\$167 per person, +34.4%).
- There were 314 scheduled flights with 58,343 seats from Canada in January 2024. Scheduled air capacity declined compared to January 2023 (358 flights, -12.3% with 66,556 seats, -12.3%) and January 2019 (403 flights, -22.0%, 72,049 seats, -19.0%).
- 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 average exchange rate of the CAD to the USD was 1.3514 in January 2024.
- The Consumer Price Index (CPI) rose 3.4 percent on a year-over-year basis in December 2023, following a 3.1 percent increase in November 2023. While gasoline prices fell for the fourth month in a row, the headline acceleration was largely the result of higher year-over-year prices for gasoline in December (+1.4%) compared with November (-7.7%).
- According to Statistics Canada, prices for air transportation rose month over month amid strong demand for air travel. Month over month, Canadians paid 31.1 percent more for air transportation in December 2023 amid strong demand for air travel during the holiday season, following a 1.1 percent gain in November 2023.
- Bank of Canada forecasts economic growth to strengthen gradually around the middle of 2024. In the second half of 2024, household spending will likely pick up and exports and business investment should get a boost from recovering foreign demand.
- WeTravel has released its second-annual What's Ahead for Travel Bookings and Payments Report, uncovering travel consumer expectations in 2024. Consumers are now customizing itineraries to localize and broaden in-destination experiences – willingly spending more on luxury travel, culinary adventures, and wellness escapes, especially in lesser-known destinations. The high-price ticket items aren't deterring bookings; instead, travel consumers are choosing to pay instantly, with the most-common booking lead time being less than one month before departure, and most travelers paying the total trip cost at checkout.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	27,861	26,353	5.7%
Maui County	278,589	75,634	45,458	209,765	205,941	20,061	24,199	-17.1%
Maui	276,825	74,974	45,149	208,071	204,467	19,941	24,070	-17.2%
Moloka'i	4,840	1,042	316	2,259	2,777	375	305	23.0%
Lāna'i	5,700	1,602	699	5,680	3,882	303	403	-24.9%
Kaua'i	76,777	22,958	7,660	42,680	54,560	5,664	6,252	-9.4%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	10,359	10,082	2.7%

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	178,500	77,264	47,564	140,518	443,846	195,687	82,694	56,426	131,389	466,196	-8.8	-6.6	-15.7	6.9	-4.8
Calgary	31,868	9,026		15,312	56,206	37,960	9,044		19,468	66,472	-16.0	-0.2		-21.3	-15.4
Edmonton	7,308	1914		3480	12,702	4,698	870		2436	8,004	55.6	120.0		42.9	58.7
Toronto	11,493	0		0	11,493	10,430	1,490		3,278	15,198	10.2	-100.0		-100.0	-24.4
Vancouver	127,831	66,324	47,564	121,726	363,445	142,599	71,290	56,426	106,207	376,522	-10.4	-7.0	-15.7	14.6	-3.5

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	962	443	276	817	2,498	1,051	463	329	723	2,566	-8.5	-4.3	-16.1	13.0	-2.7
Calgary	137	46		88	271	158	38		80	276	-13.3	21.1		10.0	-1.8
Edmonton	42	11		20	73	27	5		14	46	55.6	120.0		42.9	58.7
Toronto	39	0		0	39	35	5		11	51	11.4	-100.0		-100.0	-23.5
Vancouver	744	386	276	709	2,115	831	415	329	618	2,193	-10.5	-7.0	-16.1	14.7	-3.6

Source: DBEDT analysis from Diio Mi flight schedules as of January 25, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,634	1,949	1,056	84.6%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	43,517	47,168	-7.7%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	47,877	50,997	-6.1%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	4,877	3,961	23.1%
Convention/Conf.	10,668	4,842	405	6,654	13,094	3,424	3,085	11.0%
Corp. Meetings	3,072	856	348	5,265	2,611	1,391	288	383.3%
Incentive	4,054	995	562	3,308	4,583	400	691	-42.0%

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	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	30.4	31.3	-0.9
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	69.6	68.7	0.9

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.

Tax Revenue

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	18.01	17.91	0.5%

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