



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 February 2024 Quick Facts^{1/}

Visitor Expenditures:	\$291.5 million
Primary Purpose of Stay:	Pleasure (95,689) vs. MCI (8,059)
Average Length of Stay:	12.26 days
First Time Visitors:	30.1%
Repeat Visitors:	69.9%

	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,171.8	1,107.75	291.5	301.6	-3.4%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,336,987	4,946,565	1,300,031	1,398,719	-7.1%
Arrivals	540,103	164,393	87,900	414,250	454,103	449,688	106,050	111,361	-4.8%
Average Daily Census	17,958	6,190	3,738	13,889	14,622	13,515	21,667	23,707	-8.6%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	219.6	223.9	224.2	215.7	4.0%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,580.4	2,463.4	2,748.2	2,708.6	1.5%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.75	11.00	12.26	12.56	-2.4%

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).

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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 the first two months of 2024, 106,050 visitors arrived from Canada and visitor spending was \$291.5 million. There were 111,361 visitors in the first two months of 2023 and visitor spending was \$301.6 million. In the first two months of pre-pandemic 2019, 136,277 visitors came from Canada and visitor spending was \$318.5 million.
- In the first two months of 2024, 614 scheduled flights with 114,020 seats serviced Hawai'i from Canada. In the first two months of 2023, there were 683 scheduled flights with 127,002 seats. In the first two months of 2019 there were 770 scheduled flights with 137,674 seats.
- 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 Consumer Price Index (CPI) rose 2.9 percent on a year-over-year basis in January 2024, following a 3.4 percent gain in December 2023. The largest contributor to headline deceleration was lower year-over-year prices for gasoline in January 2024 (-4.0%) compared with December 2023 (+1.4%). Excluding gasoline, headline CPI slowed to 3.2 percent year over year in January 2024, down from the 3.5 percent growth in December 2023.
- Price growth for food purchased from stores slowed year over year in January 2024 (+3.4%) compared with December 2023 (+4.7%), putting downward pressure on the all-items CPI. Lower prices for airfares and travel tours also contributed to the headline deceleration. On a monthly basis, the CPI was unchanged in January 2024, following a 0.3 percent decline in December 2023. On a seasonally adjusted monthly basis, the CPI fell 0.1 percent in January 2024, the first decline since May 2020.
- The index of Consumer Confidence rose 4.9 points to reach 66.3 points in February 2024, marking a third consecutive monthly increase for the first time since April 2023. Despite this positive trajectory, the weight of higher mortgage interest costs and elevated grocery prices continues to bear down on household finances, as evident in this month's survey results. Three-quarters of respondents believe their financial situation will either remain the same or worsen in six months, reflecting concerns over higher interest rates and a slowing economy.
- More than 30.3 million Canadians returned home from an overnight trip to the U.S. and other destinations in 2023, 92 percent of the activity seen in 2019. Overseas activity reached 76 percent of 2019 levels, while the volume of transborder trips exceeded pre-pandemic volume (101.6%).
- The average exchange rate to the USD was 1.3501 in February 2024.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	55,441	53,168	4.3%
Maui County	278,589	75,634	45,458	209,765	205,941	39,071	47,924	-18.5%
Maui	276,825	74,974	45,149	208,071	204,467	38,809	47,685	-18.6%
Moloka'i	4,840	1,042	316	2,259	2,777	623	523	19.1%
Lāna'i	5,700	1,602	699	5,680	3,882	508	760	-33.2%
Kaua'i	76,777	22,958	7,660	42,680	54,560	11,237	11,980	-6.2%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	19,425	19,600	-0.9%

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	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	1,914		3,480	12,702	4,698	870		2,436	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	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,634	2,568	2,598	-1.1%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	86,404	91,361	-5.4%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	95,689	101,633	-5.8%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	8,059	7,092	13.6%
Convention/Conf.	10,668	4,842	405	6,654	13,094	5,338	4,395	21.4%
Corp. Meetings	3,072	856	348	5,265	2,611	1,933	720	168.4%
Incentive	4,054	995	562	3,308	4,583	1,320	2,166	-39.0%

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	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	30.1	30.8	-0.7
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	69.9	69.2	0.7

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 Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	33.81	34.99	-3.4%

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