



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 November 2023 Quick Facts^{1/}

Visitor Expenditures:	\$1.02 billion
Primary Purpose of Stay:	Pleasure (365,269) vs. MCI (18,743)
Average Length of Stay:	11.71 days
First Time Visitors:	38.1%
Repeat Visitors:	61.9%

	2019	2020	2021	2022	2023 Annual Forecast*	YTD Nov. 2023P	YTD Nov. 2022	% Change
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,154.29	1,022.6	817.1	25.2%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,217,132	4,663,916	4,320,379	8.0%
Arrivals	540,103	164,393	87,900	414,250	434,761	398,176	352,899	12.8%
Average Daily Census	17,958	6,190	3,738	13,889	14,294	13,964	12,935	8.0%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	221.3	219.3	189.1	15.9%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,655.0	2,568.1	2,315.3	10.9%
Length of Stay (days)	12.14	13.78	15.52	12.24	12.00	11.71	12.24	-4.3%

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) 2023 annual forecast (Quarter 4, 2023).

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^{1/} 2023 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 11 months of 2023, there were 398,176 visitors from Canada, compared to 352,899 visitors (+12.8%) in the first 11 months of 2022 and 475,922 visitors (-16.3%) in the first 11 months of 2019, prior to the COVID-19 pandemic.
- Visitors from Canada spent \$1.02 billion in the first 11 months of 2023, compared to \$817.1 million (+25.2%) in the first 11 months of 2022 and \$951.9 million (+7.4%) in the first 11 months of 2019. Daily visitor spending in the first 11 months of 2023 increased to \$219 per person, from \$189 per person (+15.9%) in the first 11 months of 2022 and \$166 per person (+32.2%) in the first 11 months of 2019.
- In the first 11 months of 2023, there were 2,243 scheduled flights with 405,681 seats from Canada, compared to 2,133 flights (+5.2%) with 423,733 seats (-4.3%) in the first 11 months of 2022 and 2,243 flights (0.0%) with 424,534 seats (-4.4%) the first 11 months of 2019.
- In 2022, there were 414,250 visitors from Canada compared to 540,103 visitors (-23.3%) in 2019. Visitors from Canada spent \$962.1 million in 2022, compared to \$1.08 billion (-11.0%) in 2019. Daily visitor spending in 2022 rose to \$190 per person from \$165 per person (+15.0%) in 2019.
- In 2022, there were 2,473 scheduled flights and 487,215 seats from Canada compared to 2,545 flights (-2.8%) and 484,613 seats (+0.5%) in 2019.
- In 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

- According to the Conference of Canada, the country's economy has entered a slowdown. After a slight increase of 0.1 percent in September 2023, Canada's economy declined 1.1 percent on an annualized basis in third quarter 2023, a sign of interest rates impacting Canada's economy.
- In October 2023, the Consumer Price Index (CPI) rose 3.1 percent on a year-over-year basis, down from a 3.8 percent gain in September 2023. While prices for goods (+1.6%) decelerated, led by lower prices at the pump, prices for services (+4.6%) rose at a faster pace in October 2023, largely driven by higher prices for travel tours, rent and property taxes, and other special charges.
- The average exchange rate to the USD was 1.3709 in November 2023.
- The first nine months of 2023 saw nearly 23.3 million Canadians return home from an overnight trip to the U.S. and other destinations; 90 percent of the activity seen in 2019. Overseas activity has reached 72 percent of 2019 levels, while the volume of transborder trips has surpassed pre-pandemic volume (102%) due to strong performance throughout the first half of the year.
- More than 5.2 million Canadian arrivals were recorded in Europe and the UK throughout Jan-Sept 2023; a slightly larger volume than recorded in 2019 (2%).

- Destinations in the Caribbean, Mexico, and Central America reported nearly 4.0 million arrivals from Canada throughout the first nine months of 2023, 94 percent of the activity seen in 2019. Arrivals in Mexico accounted for 40 percent of the regional volume during the period, the same share recorded in 2019.
- According to the most recent travel intentions survey by the Conference of Canada, Hawai'i is one of the top destinations in the U.S. Four-in-ten outbound leisure travelers who have selected a destination intend to visit the U.S. on their longest trip this winter. Half of those with U.S. travel plans intend to visit Florida (33%) or California (15%), with New York (8%), Nevada (7%), Arizona (6%), and Hawai'i (4%) rounding out the top choices.
- The routes to HNL, LIH, and KOA that were planned for the winter season will remain unchanged. The OGG routes are still being monitored periodically as the airlines will return to their original frequencies once the demand shows the need.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	227,491	66,240	36,660	199,898	206,175	171,697	20.1%
Maui County	278,589	75,634	45,458	209,765	184,764	180,147	2.6%
Maui	276,825	74,974	45,149	208,071	183,509	178,865	2.6%
Moloka'i	4,840	1,042	316	2,259	2,515	1,899	32.4%
Lāna'i	5,700	1,602	699	5,680	3,525	4,794	-26.5%
Kaua'i	76,777	22,958	7,660	42,680	48,341	35,085	37.8%
Island of Hawai'i	97,711	36,732	12,954	67,584	74,360	56,117	32.5%

Airlift: Scheduled Seats and Flights

Scheduled seats	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	195,687	82,694	56,426	131,389	466,196	191,476	102,266	60,676	132,797	487,215	2.2	-19.1	-7.0	-1.1	-4.3
Calgary	37,960	9,044		19,468	66,472	48,406	16,205		15,881	80,492	-21.6	-44.2		22.6	-17.4
Edmonton	4,698	870		2436	8,004	2,784	696		1566	5,046	68.8	25.0		55.6	58.6
Montreal	0				0	894				894	-100.0				-100.0
Toronto	10,430	1,490		3,278	15,198	12,218	5,619		3,576	21,413	-14.6	-73.5		-8.3	-29.0
Vancouver	142,599	71,290	56,426	106,207	376,522	127,174	79,746	60,676	111,774	379,370	12.1	-10.6	-7.0	-5.0	-0.8

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	1,051	463	329	723	2,566	860	524	354	735	2,473	22.2	-11.6	-7.1	-1.6	3.8
Calgary	158	38		80	276	243	83		63	389	-35.0	-54.2		27.0	-29.0
Edmonton	27	5		14	46	16	4		9	29	68.8	25.0		55.6	58.6
Montreal	0				0	3				3	-100.0				-100.0
Toronto	35	5		11	51	41	19		12	72	-14.6	-73.7		-8.3	-29.2
Vancouver	831	415	329	618	2,193	557	418	354	651	1,980	49.2	-0.7	-7.1	-5.1	10.8

Source: DBEDT analysis from Diio Mi flight schedules as of November 22, 2023, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Group vs True Independent (Net)							
Group Tour	8,494	NA	667	5,226	8,239	4,809	71.3%
True Independent (Net)	437,503	NA	79,122	344,925	325,407	293,177	11.0%
Leisure vs Business							
Pleasure (Net)	509,578	153,536	81,112	386,503	365,269	328,246	11.3%
MCI (Net)	17,464	6,485	1,280	14,822	18,743	13,846	35.4%
Convention/Conf.	10,668	4,842	405	6,654	12,554	6,026	108.3%
Corp. Meetings	3,072	856	348	5,265	2,316	5,054	-54.2%
Incentive	4,054	995	562	3,308	4,342	3,164	37.2%

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	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	38.1	32.5	5.5
Repeat Visitors (%)	64.6	NA	75.2	67.8	61.9	67.5	-5.5

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	YTD Nov. 2023P	YTD Nov. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	118.62	95.37	24.4%

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