



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 December 2023 Quick Facts^{1/}

Visitor Expenditures:	\$1.17 billion
Primary Purpose of Stay:	Pleasure (417,248) vs. MCI (19,799)
Average Length of Stay:	11.75 days
First Time Visitors:	36.9%
Repeat Visitors:	63.1%

	2019	2020	2021	2022	2023 Annual Forecast*	YTD Dec. 2023P	YTD Dec. 2022	% Change
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,154.29	1,171.8	962.1	21.8%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,217,132	5,336,987	5,069,619	5.3%
Arrivals	540,103	164,393	87,900	414,250	434,761	454,103	414,250	9.6%
Average Daily Census	17,958	6,190	3,738	13,889	14,294	14,622	13,889	5.3%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	221.3	219.6	189.8	15.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,655.0	2,580.4	2,322.4	11.1%
Length of Stay (days)	12.14	13.78	15.52	12.24	12.00	11.75	12.24	-4.0%

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

- For all of 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, prior to the COVID-19 pandemic.
- 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 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.
- In 2022, there were 414,250 visitors from Canada compared to 87,900 visitors in 2021, 164,393 visitors in 2020 and 540,103 visitors in 2019. Total visitor spending was \$962.1 million in 2022 compared to \$240.6 million in 2021 and \$1.08 billion in 2019.
- In 2022, there were 2,473 scheduled flights and 487,215 seats from Canada. There was limited air service from Canada in 2021 with 610 scheduled flights and 129,098 seats. In 2020, air service was reduced to 876 scheduled flights with 177,913 seats due to the pandemic. Direct flights were suspended from April through November 2020 and resumed in December 2020 with limited service from Calgary. There were 2,545 flights with 484,613 seats in 2019.

Market Conditions

- Canada's real gross domestic product declined 0.3 percent in the third quarter of 2023, following a 0.3 percent increase in the second quarter. The decrease in international exports and slower inventory accumulation were partially offset by increases in government spending and housing investment.
- Employment was virtually unchanged in December 2023, and the unemployment rate held steady at 5.8 percent. Among core-aged men (aged 25 to 54), employment rose by 25,000 (+0.4%). Employment also rose among young women aged 15 to 24 (+13,000; +1.0%) but declined among men aged 55 and older (-27,000; -1.1%).
- Tourism spending in Canada grew 0.5 percent in the third quarter of 2023, following a 1.1 percent increase in the second quarter. Tourism gross domestic product edged down 0.1 percent in the third quarter of 2023, following a 0.5 percent increase in the second quarter. Tourism spending by international visitors was up 2.3 percent in the third quarter of 2023, following a 3.2 percent increase in the second quarter. Tourism spending in Canada by Canadians decreased by 0.2 percent in the third quarter of 2023.
- The Consumer Price Index (CPI) rose 3.1 percent on a year-over-year basis in November 2023, matching the 3.1 percent increase in October 2023. In November 2023, higher prices for travel tours put upward pressure on the CPI. Canadians continued to feel the impact of higher prices for mortgage interest costs (+29.8%), food purchased from stores (+4.7%), and rent (+7.4%), which were the largest contributors to the year-over-year increase in November.
- The average Canadian Dollar exchange rate to the USD was 1.3431 during December 2023.
- More than 17.6 million Canadians returned home from an overnight transborder trip throughout Jan-Oct 2023. While the volume of trips by air has surpassed 2019 activity (22%), auto travel is lower than it was in 2019 (-14%). Auto trips accounted for 47 percent of activity during the period, compared to 56 percent in 2019.

- Nearly 5.8 million Canadian arrivals were recorded in Europe and the UK throughout Jan-Oct 2023, a slightly larger volume than recorded in 2019 (+1.4%).
- Destinations in the Caribbean, Mexico, and Central America reported 4.2 million arrivals from Canada throughout the first ten months of 2023, 96 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.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	199,898	17.6%
Maui County	278,589	75,634	45,458	209,765	205,941	209,765	-1.8%
Maui	276,825	74,974	45,149	208,071	204,467	208,071	-1.7%
Moloka'i	4,840	1,042	316	2,259	2,777	2,259	22.9%
Lāna'i	5,700	1,602	699	5,680	3,882	5,680	-31.7%
Kaua'i	76,777	22,958	7,660	42,680	54,560	42,680	27.8%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	67,584	25.2%

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	YTD Dec. 2023P	YTD Dec. 2022	% Change
Group vs True Independent (Net)							
Group Tour	8,494	NA	667	5,226	8,634	5,226	65.2%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	344,925	7.9%
Leisure vs Business							
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	386,503	8.0%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	14,822	33.6%
Convention/Conf.	10,668	4,842	405	6,654	13,094	6,654	96.8%
Corp. Meetings	3,072	856	348	5,265	2,611	5,265	-50.4%
Incentive	4,054	995	562	3,308	4,583	3,308	38.6%

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 Dec. 2023P	YTD Dec. 2022	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	32.2	4.7
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	67.8	-4.7

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	YTD Dec. 2023P	YTD Dec. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	111.60	21.8%

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