



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 2024, 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 May 2024 Quick Facts^{1/}

Visitor Expenditures:	\$561.1 million
Primary Purpose of Stay:	Pleasure (204,656) vs. MCI (11,596)
Average Length of Stay:	11.42 days
First Time Visitors:	33.0%
Repeat Visitors:	67.0%

	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD May 2024P	YTD May 2023P	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,171.8	1,107.66	561.1	613.2	-8.5%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,336,987	4,967,107	2,550,968	2,848,668	-10.5%
Arrivals	540,103	164,393	87,900	414,250	454,103	439,567	223,402	238,250	-6.2%
Average Daily Census	17,958	6,190	3,738	13,889	14,622	13,571	16,783	18,865	-11.0%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	219.6	223.0	220.0	215.3	2.2%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,580.4	2,519.9	2,511.7	2,574.0	-2.4%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.75	11.30	11.42	11.96	-4.5%

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) 2024 annual forecast (Quarter 2, 2024).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2279
jadie@gohta.net

Hawai'i Tourism Canada: Colin Wood, Account Director
 Telephone: (416) 770-2155
colin@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 five months of 2024, there were 223,402 visitors from Canada, compared to 238,250 visitors (-6.2%) in the first five months of 2023 and 296,362 visitors (-24.6%) in the first five months of 2019. Visitors from Canada spent \$561.1 million in the first five months of 2024, compared to \$613.2 million (-8.5%) in the first five months of 2023 and \$606.7 million (-7.5%) in the first five months of 2019. Daily visitor spending in the first five months of 2024 of \$220 per person was higher compared to the first five months of 2023 (\$215 per person, +2.2%) and the first five months of 2019 (\$166 per person, +32.2%).
- In the first five months of 2024, 1,307 scheduled flights with 238,592 seats serviced Hawai'i from Canada. In the first five months of 2023, there were 1,396 scheduled flights (-6.4%) with 258,149 seats (-7.6%). In the first five months of 2019 there were 1,540 scheduled flights (-15.1%) with 289,796 seats (-17.7%).
- 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 currency exchange rate in May 2024 was \$0.73, which tends to unfavorably impact considerations for US travel. However, this rate has remained below \$0.75 for the past 10 months, establishing a "new normal" that has a diminished effect on US travel considerations.
- The Canadian economy has exceeded expectations, avoiding the recession that some had predicted despite higher interest rates. Inflation, which peaked at 8.1 percent in June 2022, decreased to 2.9 percent in January and further to 2.8 percent by February 2024.
- Over 5.4 million Canadians returned from overnight trips to the US and other destinations in the first two months of 2024, a 14 percent increase from last year and a 3 percent increase from 2019. Overseas travel reached 96 percent of 2019 levels, while transborder trips exceeded pre-pandemic volumes by 10 percent.
- In January and February 2024, more than 2.94 million Canadians returned from overnight transborder trips, compared to 3.14 million last year (-6.4%) and 2.67 million in 2019 (+10.3%). Air travel during this period approached 1.8 million trips, surpassing 2019 levels by 20 percent.
- According to a recent survey on summer outbound travel, nearly half of leisure travelers who have chosen a destination plan to visit the US for their longest trip this summer (46%), a higher proportion than reported at the beginning of the 2019 season (42%). The majority of cross-border travelers planning trips reside in Ontario (40%), Quebec (21%), and British Columbia (17%), a distribution similar to pre-pandemic levels.
- Nearly four-in-ten travelers intending to visit the US are aged 35-54, while one-third are 55 and older. Sixty-three percent do not have dependent children at home, although 25 percent plan to travel with their children this summer. Additionally, half of the travelers' plan to travel only with

their significant other (33%) or with a group of other adults (20%). Nearly eight-in-ten have taken at least one outbound trip in the past two years.

- WestJet has indicated plans to reduce its Calgary (YYC) to Honolulu flights from 5 times a week to 4 starting in January 2025, while aiming to increase frequencies to Maui.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	120,559	116,562	3.4%
Maui County	278,589	75,634	45,458	209,765	205,941	83,421	109,028	-23.5%
Maui	276,825	74,974	45,149	208,071	204,467	82,737	108,227	-23.6%
Moloka'i	4,840	1,042	316	2,259	2,777	1,472	1,338	10.1%
Lāna'i	5,700	1,602	699	5,680	3,882	1,111	2,297	-51.7%
Kaua'i	76,777	22,958	7,660	42,680	54,560	23,766	25,419	-6.5%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	39,558	41,806	-5.4%

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	134,178	433,060	195,687	82,694	56,426	131,389	466,196	-9.5	-7.6	-19.7	2.1	-7.1
Calgary	31,548	9,026	4,524	19,826	64,924	37,960	9,044	0	19,468	66,472	-16.9	-0.2		1.8	-2.3
Edmonton	7,308	1914		3480	12,702	4,698	870		2436	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	759	2,416	1,051	463	329	723	2,566	-9.0	-5.4	-20.1	5.0	-5.8
Calgary	136	46	26	98	306	158	38	0	80	276	-13.9	21.1		22.5	10.9
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 June 25, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,634	4,439	4,859	-8.7%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	180,280	193,745	-6.9%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	204,656	220,425	-7.2%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	11,596	10,826	7.1%
Convention/Conf.	10,668	4,842	405	6,654	13,094	7,319	5,950	23.0%
Corp. Meetings	3,072	856	348	5,265	2,611	2,487	1,610	54.5%
Incentive	4,054	995	562	3,308	4,583	2,498	3,592	-30.5%

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.

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	33.0	33.0	0.0
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	67.0	67.0	0.0

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.

Tax Revenue

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	65.09	71.14	-8.5%

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