



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 June 2024 Quick Facts^{1/}

Visitor Expenditures:	\$595.8 million
Primary Purpose of Stay:	Pleasure (219,638) vs. MCI (12,048)
Average Length of Stay:	11.32 days
First Time Visitors:	34.0%
Repeat Visitors:	66.0%

	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD June 2024P	YTD June 2023P	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,171.8	1,107.66	595.8	658.0	-9.4%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,336,987	4,967,107	2,713,551	3,046,893	-10.9%
Arrivals	540,103	164,393	87,900	414,250	454,103	439,567	239,782	257,487	-6.9%
Average Daily Census	17,958	6,190	3,738	13,889	14,622	13,571	14,910	16,834	-11.4%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	219.6	223.0	219.6	215.9	1.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,580.4	2,519.9	2,484.9	2,555.3	-2.8%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.75	11.30	11.32	11.83	-4.4%

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 2, 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 half of 2024, there were 239,782 visitors from Canada, compared to 257,487 visitors (-6.9%) in the first half of 2023 and 315,535 visitors (-24.0%) in the first half of pre-pandemic 2019. Visitors from Canada spent \$595.8 million in the first half of 2024, compared to \$658.0 million (-9.4%) in the first half of 2023 and \$642.8 million (-7.3%) in the first half of 2019. Daily visitor spending in the first half of 2024 of \$220 per person was higher compared to the first half of 2023 (\$216 per person, +1.7%) and the first half of 2019 (\$166 per person, +32.3%).
- In the first half of 2024, 1,393 scheduled flights with 253,406 seats serviced Hawai'i from Canada. In the first half of 2023, there were 1,514 scheduled flights (-8.0%) with 278,381 seats (-9.0%). In the first half of 2019 there were 1,630 scheduled flights (-14.5%) with 306,686 seats (-17.4%).
- 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

- In June 2024, the Canadian Dollar maintained an exchange rate of approximately \$0.73 USD, reflecting a rate that many Canadians are increasingly accepting as the new normal. However, for some travelers, this rate remains a barrier to booking trips to the US.
- Canadian households have faced significant challenges over the past two years, grappling with rising prices and increased borrowing costs. While the Canadian economy shows slow improvement, inflation is easing, economic growth has resumed, and wages are showing signs of recovery, as noted by the Bank of Canada. The labor market remains stable.
- With inflation showing a downward trend and the unemployment rate rising to 6.2 percent in May 2024, the Bank of Canada found that adjustments to interest rates were achieving their intended effects. Consequently, they decided to reduce their policy interest rate by 25 basis points. This adjustment is expected to provide relief to consumers and businesses, which should contribute to economic growth in the latter part of the year.
- In the first quarter of 2024, nearly 8.9 million Canadians returned from overnight trips to the US and other destinations, marking a 13 percent increase from last year and a 2 percent rise from 2019. Overseas travel reached 96 percent of its 2019 levels, while transborder trips exceeded pre-pandemic volumes by 7 percent.
- Approximately 4.98 million Canadians returned from overnight transborder trips, a decrease of 5 percent from last year but a 7 percent increase from 2019. Air travel during this period approached 2.86 million trips, surpassing 2019 levels by 17 percent but declining 16 percent compared to 2023. Auto travel reached 97 percent of its 2019 volume, showing a 14 percent increase from the first quarter of 2023.

- Destinations in the Caribbean, Mexico, and Central America welcomed nearly 2.5 million Canadian visitors in the first quarter of 2024, slightly higher than in 2019 and a 10 percent increase from last year.
- WestJet has announced plans to reduce its Calgary to Honolulu flights from 5 times a week to 4 starting in January 2025, while aiming to increase frequencies to Maui in the future.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	227,491	66,240	36,660	199,898	235,064	131,763	125,447	5.0%
Maui County	278,589	75,634	45,458	209,765	205,941	89,653	123,135	-27.2%
Maui	276,825	74,974	45,149	208,071	204,467	88,936	122,312	-27.3%
Moloka'i	4,840	1,042	316	2,259	2,777	1,617	1,626	-0.5%
Lāna'i	5,700	1,602	699	5,680	3,882	1,201	2,440	-50.8%
Kaua'i	76,777	22,958	7,660	42,680	54,560	25,560	27,914	-8.4%
Island of Hawai'i	97,711	36,732	12,954	67,584	84,601	42,179	44,739	-5.7%

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	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 June 2024P	YTD June 2023P	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,634	4,616	5,385	-14.3%
True Independent (Net)	437,503	NA	79,122	344,925	372,277	193,213	210,156	-8.1%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	417,248	219,638	237,865	-7.7%
MCI (Net)	17,464	6,485	1,280	14,822	19,799	12,048	11,315	6.5%
Convention/Conf.	10,668	4,842	405	6,654	13,094	7,681	6,198	23.9%
Corp. Meetings	3,072	856	348	5,265	2,611	2,526	1,720	46.9%
Incentive	4,054	995	562	3,308	4,583	2,551	3,760	-32.2%

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	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.9	34.0	34.7	-0.7
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.1	66.0	65.3	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 June 2024P	YTD June 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	135.92	69.12	76.32	-9.4%

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