



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 July 2024 Quick Facts^{1/}

Visitor Expenditures: \$645.6 million
 Primary Purpose of Stay: Pleasure (239,320) vs. MCI (12,483)
 Average Length of Stay: 11.23 days
 First Time Visitors: 34.6%
 Repeat Visitors: 65.4%

	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD July 2024P	YTD July 2023	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	1,107.66	645.6	759.5	-15.0%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,967,107	2,935,569	3,511,671	-16.4%
Arrivals	540,103	164,393	87,900	414,250	474,727	439,567	261,333	298,187	-12.4%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	13,571	13,782	16,564	-16.8%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	223.0	219.9	216.3	1.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,519.9	2,470.4	2,547.1	-3.0%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	11.30	11.23	11.78	-4.6%

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/} 2024P visitor data are preliminary. 2019 - 2023 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 seven months of 2024, there were 261,333 visitors from Canada, compared to 298,187 visitors (-12.4%) in the first seven months of 2023 and 342,474 visitors (-23.7%) in the first seven months of 2019. Visitors from Canada spent \$645.6 million in the first seven months of 2024, compared to \$759.5 million (-15.0%) in the first seven months of 2023 and \$692.9 million (-6.8%) in the first seven months of pre-pandemic 2019.
- In the first seven months of 2024, 1,480 scheduled flights with 268,389 seats serviced Hawai'i from Canada. In the first seven months of 2023, there were 1,638 scheduled flights (-9.6%) with 299,647 seats (-10.4%). In the first seven months of 2019 there were 1,723 scheduled flights (-14.1%) with 324,056 seats (-17.2%).
- In 2023, there were 474,727 visitors from Canada, compared to 414,250 visitors (+14.6%) in 2022 and 540,103 visitors (-12.1%) in 2019.
- Visitors from Canada spent \$1.23 billion in 2023, compared to \$962.1 million (+27.9%) in 2022 and \$1.08 billion (+13.8%) in 2019. Daily visitor spending in 2023 increased to \$220 per person, from \$190 per person (+16.1%) in 2022 and \$165 per person (+33.5%) 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

- During July 2024, the Bank of Canada lowered its policy rate by a second straight 25 basis points, taking the rate to 4.50 percent.
- For Canadians interested in US travel, the exchange rate dipped further in July 2024. Some economists suggest the falling interest rates are contributing to an exchange rate of a Canadian Dollar being worth \$0.72 USD, the lowest in the last 20 years. The hope for Canadians is that the US will drop its interest rates which may help the falling Canadian exchange rate.
- Inflation has cooled to 2.5 percent year over year.
- Canada's GDP rose by 0.2 percent in May 2024, beating analysts' expectations and putting the economy on track for a 2.2 percent growth in the second quarter.
- The first five months of 2024 saw 14.57 million Canadians return home from an overnight trip to the U.S. and other destinations, compared to 13.11 million last year (11%), and 14.42 million in 2019 (1%). Overseas travel has reached 97 percent of 2019 activity, while the volume of transborder trips remains above pre-pandemic volume (104%).
- The first month of the summer travel season (May) saw 1.7 million Canadians return home from an overnight transborder trip, a similar volume as last year and a 3% increase compared to 2019.
- A recent Flight Centre study surveyed young adults in 5 countries and determined that Canadians travel less than their counterparts in Australia, New Zealand, the UK, and South Africa. This was attributed to lower vacation time allowances and a significant difference in the cost of domestic travel.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	145,802	146,686	-0.6%
Maui County	278,589	75,634	45,458	209,765	216,895	97,995	149,256	-34.3%
Maui	276,825	74,974	45,149	208,071	215,713	97,202	148,535	-34.6%
Moloka'i	4,840	1,042	316	2,259	2,582	1,647	1,886	-12.7%
Lāna'i	5,700	1,602	699	5,680	3,688	1,315	2,867	-54.1%
Kaua'i	76,777	22,958	7,660	42,680	56,412	27,792	32,893	-15.5%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	45,760	52,964	-13.6%

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	2023	YTD July 2024P	YTD July 2023	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,975	4,898	6,043	-19.0%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	210,725	243,184	-13.3%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	239,320	275,812	-13.2%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	12,483	12,656	-1.4%
Convention/Conf.	10,668	4,842	405	6,654	13,665	7,967	7,216	10.4%
Corp. Meetings	3,072	856	348	5,265	2,724	2,579	1,849	39.5%
Incentive	4,054	995	562	3,308	4,818	2,657	3,978	-33.2%

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	2023	YTD July 2024P	YTD July 2023	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	34.6	36.5	-1.9
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	65.4	63.5	1.9

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	2023	YTD July 2024P	YTD July 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	142.71	74.89	88.10	-15.0%

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