



## 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 August 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$702.2 million
Primary Purpose of Stay:	Pleasure (261,519) vs. MCI (13,149)
Average Length of Stay:	11.11 days
First Time Visitors:	35.3%
Repeat Visitors:	64.7%

	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Aug. 2024P	YTD Aug. 2023	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	1,093.60	702.2	817.4	-14.1%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,887,902	3,174,511	3,769,217	-15.8%
Arrivals	540,103	164,393	87,900	414,250	474,727	432,558	285,842	321,569	-11.1%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	13,355	13,010	15,511	-16.1%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	223.7	221.2	216.9	2.0%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,528.2	2,456.7	2,541.9	-3.4%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	11.30	11.11	11.72	-5.3%

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) 2024 annual forecast (Quarter 3, 2024).

### Contact Information

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<sup>1/</sup> 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

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- In the first eight months of 2024, there were 285,842 visitors from Canada, compared to 321,569 visitors (-11.1%) in the first eight months of 2023 and 371,146 visitors (-23.0%) in the first eight months of pre-pandemic 2019. Visitors from Canada spent \$702.2 million in the first eight months of 2024, compared to \$817.4 million (-14.1%) in the first eight months of 2023 and \$750.1 million (-6.4%) in the first eight months of 2019. Daily visitor spending in the first eight months of 2024 (\$221 per person) was higher compared to the first eight months of 2023 (\$217 per person, +2.0%) and the first eight months of 2019 (\$166 per person, +33.0%).
- In the first eight months of 2024, 1,568 scheduled flights with 283,546 seats serviced Hawai'i from Canada. In the first eight months of 2023, there were 1,751 scheduled flights (-10.5%) with 319,009 seats (-11.1%). In the first eight months of 2019 there were 1,816 scheduled flights (-13.7%) with 341,447 seats (-17.0%).
- 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

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- The overall unemployment rate increased to 6.6 percent in August 2024, which is the highest rate in 7 years. The government is adjusting immigration and temporary work visa policies as a result.
- During August, 2024, the Bank of Canada lowered its policy interest rate by a second straight 25 basis points (after a 25 basis point decrease in July, 2024), taking the rate to 4.25 percent. This was anticipated and is seen to be good news for the economy and consumer confidence overall.
- The first half of 2024 saw 16.8 million Canadians return home from an overnight trip to the U.S. and other destinations, compared to 15.1 million last year (+11%), and 16.7 million in 2019 (+0.6%).
- The first two months of the 2024 summer travel season (May-June) saw 3.15 million Canadians return home from an overnight trip to the U.S., a similar volume as last year and a 2.6 percent increase compared to 2019. At the same time, 1.8 million Canadians returned home from a non-U.S. (overseas) trip, a comparable volume of activity as reported in 2019 (-0.5%), but a 29 percent increase over last summer.
- More than 9.9 million Canadians returned home from an overnight transborder trip to the U.S. in the first half of 2024, a lower level of activity than last year (-3.2%) but a larger volume than recorded in 2019 (+3.3%). Trips by air surpassed 5.26 million during the period, a larger volume than reported in 2019 (+16.7%) but a 12 percent drop versus last year. In contrast, the volume of trips by auto has grown 8.8 percent compared to last year but remains below the level seen in 2019 (-7.6%).

- The first two months of the 2024 summer travel season saw 425,000 arrivals in the region. This was 27 percent more than last summer, but just 87 percent of the volume recorded in 2019.
- Some recent reports suggest that the all-inclusive resort market may be starting to plateau. Canadians historically love the concept, but the rates have increased considerably, some have doubled over the past two years. Travelers are increasingly comparing value and experiences that other travel models offer. If all-inclusive demand dips, this could suggest Canadians are perhaps becoming more confident in wanting to get out and explore the destinations they are choosing to visit. Which could align well with Hawai'i's competitive advantages.
- For the full winter season, WestJet has increased average air capacity to O'ahu by 4 percent, Kaua'i by 27 percent, and Hawai'i Island by 9 percent year-over-year, while Maui has decreased by 23 percent. Worth noting is that this year-over-year comparison is to the reduced schedule utilized last winter season.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	161,750	162,933	-0.7%
Maui County	278,589	75,634	45,458	209,765	216,895	106,597	157,143	-32.2%
Maui	276,825	74,974	45,149	208,071	215,713	105,765	156,352	-32.4%
Moloka'i	4,840	1,042	316	2,259	2,582	1,681	1,975	-14.9%
Lāna'i	5,700	1,602	699	5,680	3,688	1,402	2,937	-52.2%
Kaua'i	76,777	22,958	7,660	42,680	56,412	30,274	36,656	-17.4%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	49,702	57,849	-14.1%

## 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	45,128	121,943	420,651	195,687	82,694	56,426	131,389	466,196	-9.5	-7.6	-20.0	-7.2	-9.8
Calgary	31,548	9,026	4,524	19,388	64,486	37,960	9,044	0	19,468	66,472	-16.9	-0.2	NA	-0.4	-3.0
Edmonton	7,308	1,914		3,654	12,876	4,698	870		2,436	8,004	55.6	120.0		50.0	60.9
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	40,604	96,861	330,054	142,599	71,290	56,426	106,207	376,522	-10.8	-8.2	-28.0	-8.8	-12.3

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	956	438	262	691	2,347	1,051	463	329	723	2,566	-9.0	-5.4	-20.4	-4.4	-8.5
Calgary	136	46	26	98	306	158	38	0	80	276	-13.9	21.1	NA	22.5	10.9
Edmonton	42	11		21	74	27	5		14	46	55.6	120.0		50.0	60.9
Toronto	38	0		8	46	35	5		11	51	8.6	-100.0		-27.3	-9.8
Vancouver	740	381	236	564	1,921	831	415	329	618	2,193	-11.0	-8.2	-28.3	-8.7	-12.4

Source: DBEDT analysis from Diio Mi flight schedules as of September 17, 2024, subject to change.

## Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,975	5,079	6,195	-18.0%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	230,677	261,744	-11.9%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	261,519	297,664	-12.1%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	13,149	12,731	3.3%
Convention/Conf.	10,668	4,842	405	6,654	13,665	8,320	7,270	14.4%
Corp. Meetings	3,072	856	348	5,265	2,724	2,634	1,863	41.4%
Incentive	4,054	995	562	3,308	4,818	2,922	3,984	-26.7%

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.

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	35.3	37.8	-2.5
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	64.7	62.2	2.5

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	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	28.09	111.60	142.71	81.46	94.82	-14.1%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).