



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 September 2024 Quick Facts^{1/}

Visitor Expenditures:	\$745.8 million
Primary Purpose of Stay:	Pleasure (278,748) vs. MCI (13,882)
Average Length of Stay:	11.01 days
First Time Visitors:	36.1%
Repeat Visitors:	63.9%

	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Sep. 2024P	YTD Sep. 2023	% Change
CANADA MMA (by Air)									
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	1,093.60	745.8	865.5	-13.8%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,887,902	3,358,907	3,972,855	-15.5%
Arrivals	540,103	164,393	87,900	414,250	474,727	432,558	305,029	340,217	-10.3%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	13,355	12,259	14,553	-15.8%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	223.7	222.0	217.8	1.9%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,528.2	2,445.1	2,543.8	-3.9%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	11.30	11.01	11.68	-5.7%

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).

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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 nine months of 2024, there were 305,029 visitors from Canada, compared to 340,217 visitors (-10.3%) in the first nine months of 2023 and 393,074 visitors (-22.4%) in the first nine months of pre-pandemic 2019. Visitors from Canada spent \$745.8 million in the first nine months of 2024, compared to \$865.5 million (-13.8%) in the first nine months of 2023 and \$790.6 million (-5.7%) in the first nine months of 2019. Daily visitor spending in the first nine months of 2024 (\$221 per person) was higher compared to the first nine months of 2023 (\$222 per person, +1.9%) and the first nine months of 2019 (\$166 per person, +33.8%).
- In the first nine months of 2024, 1,653 scheduled flights with 298,186 seats serviced Hawai'i from Canada. In the first nine months of 2023, there were 1,843 scheduled flights (-10.3%) with 334,807 seats (-10.9%). In the first nine months of 2019 there were 1,898 scheduled flights (-12.9%) with 356,885 seats (-16.4%).
- 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

- The Bank of Canada continues to cut interest rates, as inflation is on track to reach 2 percent by the end of 2024. Economists and the Bank of Canada have indicated the further cuts are likely.
- In September 2024, the exchange rate continued to hover between \$0.73 and \$0.745.
- Over the past year, Canada's labor market has seen an expansion of the labor force at nearly double the pace of hiring. The unemployment rate has risen to a post-pandemic low of roughly 5 percent to 6.6 percent.
- The first seven months of 2024 saw 19.75 million Canadians return home from an overnight outbound trip, compared to 17.83 million last year (+10.7%), and 19.66 million in 2019 (+0.4%).
- The volume of transborder trips year-to-date is lower than in 2023 but slightly above 2019 activity, while overseas activity has reached 98 percent of 2019 volume. The month of July 2024 saw activity to non-U.S. (overseas) destinations surpass the level recorded in 2019 for the first time since the pandemic began.
- Nearly 11.9 million Canadians returned home from an overnight transborder trip between Jan-July 2024, a lower level of activity than last year (-2.7%) but a larger volume than recorded in 2019 (+2.3%). Trips by air reached 5.9 million during the period, a larger volume than reported in 2019 (+16.7%) but an 11.3 percent drop over last year. Trips by auto remain below the level seen in 2019 (-7.7%) but are up 7.4 percent compared to last year.
- An Air Canada pilot's strike that was scheduled for September 2024 did not proceed, and they have an overall reduced schedule to Hawai'i vs. 2023, including Toronto to Maui one time per week was cancelled.

- 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 Sep. 2024P	YTD Sep. 2023	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	173,937	176,664	-1.5%
Maui County	278,589	75,634	45,458	209,765	216,895	113,749	162,821	-30.1%
Maui	276,825	74,974	45,149	208,071	215,713	112,897	162,017	-30.3%
Moloka'i	4,840	1,042	316	2,259	2,582	1,715	2,006	-14.5%
Lāna'i	5,700	1,602	699	5,680	3,688	1,497	2,971	-49.6%
Kaua'i	76,777	22,958	7,660	42,680	56,412	31,986	40,155	-20.3%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	51,956	61,154	-15.0%

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	76,220	44,780	121,943	420,129	195,687	82,694	56,426	131,389	466,196	-9.5	-7.8	-20.6	-7.2	-9.9
Calgary	31,548	9,026	4,176	19,388	64,138	37,960	9,044	0	19,468	66,472	-16.9	-0.2	NA	-0.4	-3.5
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	65,280	40,604	96,861	329,880	142,599	71,290	56,426	106,207	376,522	-10.8	-8.4	-28.0	-8.8	-12.4

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	956	437	260	691	2,344	1,051	463	329	723	2,566	-9.0	-5.6	-21.0	-4.4	-8.7
Calgary	136	46	24	98	304	158	38	0	80	276	-13.9	21.1	NA	22.5	10.1
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	380	236	564	1,920	831	415	329	618	2,193	-11.0	-8.4	-28.3	-8.7	-12.4

Source: DBEDT analysis from Diio Mi flight schedules as of October 22, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,975	5,266	6,476	-18.7%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	247,256	277,158	-10.8%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	278,748	313,685	-11.1%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	13,882	13,906	-0.2%
Convention/Conf.	10,668	4,842	405	6,654	13,665	8,835	8,149	8.4%
Corp. Meetings	3,072	856	348	5,265	2,724	2,716	1,938	40.2%
Incentive	4,054	995	562	3,308	4,818	3,063	4,225	-27.5%

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	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	36.1	38.6	-2.5
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	63.9	61.4	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 Sep. 2024P	YTD Sep. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	142.71	86.51	100.39	-13.8%

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