



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 November 2024 Quick Facts^{1/}

Visitor Expenditures:	\$921.3 million
Primary Purpose of Stay:	Pleasure (346,555) vs. MCI (16,108)
Average Length of Stay:	10.88 days
First Time Visitors:	36.1%
Repeat Visitors:	63.9%

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Nov. 2024P	YTD Nov. 2023	% Change
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	982.79	921.3	1,071.6	-14.0%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,374,151	4,132,160	4,887,306	-15.5%
Arrivals	540,103	164,393	87,900	414,250	474,727	397,173	379,846	416,842	-8.9%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	11,951	12,335	14,633	-15.7%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	224.7	223.0	219.3	1.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,474.5	2,425.4	2,570.9	-5.7%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	11.01	10.88	11.72	-7.2%

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 4, 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 11 months of 2024, there were 379,846 visitors from Canada, compared to 416,842 visitors (-8.9%) in the first 11 months of 2023 and 475,922 visitors (-20.2%) in the first 11 months of 2019. Visitors from Canada spent \$921.3 million in the first 11 months of 2024, compared to \$1.07 billion (-14.0%) in the first 11 months of 2023 and \$951.9 million (-3.2%) in the first 11 months of pre-pandemic 2019. Daily visitor spending in the first 11 months of 2024 (\$223 per person) was higher compared to the first 11 months of 2023 (\$219 per person, +1.7%) and the first 11 months of 2019 (\$166 per person, +34.4%).
- In the first 11 months of 2024, 2,046 scheduled flights with 366,553 seats serviced Hawai'i from Canada. In the first 11 months of 2023, there were 2,243 scheduled flights (-8.8%) with 405,681 seats (-9.6%). In the first 11 months of 2019 there were 2,243 scheduled flights (-8.8%) with 424,534 seats (-13.7%).
- 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

- Potential impact of the election has had a significant impact on confidence in the Canadian economy. Statements about tariffs, potential trade wars, potential negative potential impact on Canada's economy are receiving lots of media coverage, likely impacting consumer confidence with the uncertainty generated.
- A new study by the Canadian Chamber of Commerce indicated the potential impact of a new 25 percent tariff on Canadian exports to the U.S. If implemented, it would cost Canadians approximately \$1,900 CAD per person, which would reduce discretionary spending.
- Related to uncertainty, the USD to CAD exchange rate dipped down in November to \$0.71 USD in exchange for every Canadian Dollar, with many economists predicting a further reduction. This is concerning as it relates to US travel volumes.
- The unemployment rate climbed to 6.8 percent in November 2024, up from 6.5 percent in October. Economists identify that challenges related to the revised immigration policies are the key contributor. Rising unemployment is seen as a potential impediment to the Bank of Canada continuing with its approach of aggressively cutting interest rates in order to address the inflation challenges Canadians are facing.
- More positively as economists predicted, the overall Canadian economy grew in November 2024 as a result of increased consumer spending which supports the Bank of Canada's approach in cutting interest rates.
- Consumer confidence levels fell slightly to 70.0 points in November 2024. Although Canadian consumers are more optimistic about their future job prospects, many are still concerned about their current finances. While the inflation rate is coming down, the impact of a sluggish economy and elevated debt levels are still having an impact on consumers' financial outlook.
- Canadian travel to Europe and the United Kingdom has been increasing (5.83 million Canadian arrivals) throughout the first nine months of 2024, a larger volume than reported in both 2019 (14.0%) and 2023 (11.9%). The first five months of the summer travel season (May-Sept) saw 4.45 million arrivals in European destinations. This was 15.1 percent more activity than recorded in 2019, and an 11.6 percent increase compared to last year.

- Canadian travel to Asia, Oceania, and the South Pacific increased (More than 2.18 million Canadian arrivals were recorded in the Asia-Pacific region throughout the first nine months of 2024); 27.8 percent more activity than recorded last year. With arrivals in China and the S.A.R remaining below pre-pandemic levels, 53 percent of the activity recorded so far this year was to destinations in Oceania and South/Southeast Asia, compared to 48 percent in 2019.
- Canadian Travel to destinations in the Caribbean and Latin America reported 4.36 million arrivals throughout the first three quarters of 2024, a larger volume than seen in 2019 (2.4%) and a 7.9 percent increase over last year.
- Cuba, which is historically very popular with Canadians, has experienced significant power infrastructure challenges. Tour operators and Advisors are seeing reduced interest in the destination.
- Recent consumer trends:
 - A recent article in the Huffington Post indicated travel trends its article research had identified. Astro tourism or Noctourism which is all about embracing the stars and celestial events – the aurora borealis in particular. Canada is directly benefitting from this trend which is relevant for travel to Hawai'i.
 - The same article identified a trend towards “detour destinations,” which are smaller, quieter spots outside of metropolitan areas. This speaks to the important objective of encouraging tourists to go beyond major sites, supporting the idea of reducing over-tourism. Additionally, the article mentioned destinations increasing in popularity. Thailand, Orlando, Italy, Japan, Kenya, New Zealand, Scotland, and Antarctica were all included.
 - Data from Statistics Canada indicates that the travel industry has bounced back to the pre-pandemic norm. Operating revenue for the industry group increased 53.5 percent year-over-year and 3.8 percent above pre-pandemic levels. Agency profit levels reached 14.8 percent, which is the highest margin in more than a decade. This supports the other evidence that Canadians continue to prioritize booking discretionary travel.
- Airlift - For the full winter season, WestJet has increased average capacity to O'ahu by 4 percent, Kaua'i by 27 percent, and the Island of Hawai'i by 9 percent year-over-year, while Maui has decreased by 23 percent. Worth noting is that this is compared to the reduced schedule utilized last winter season after the Maui fire.

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	213,924	214,739	-0.4%
Maui County	278,589	75,634	45,458	209,765	216,895	141,003	194,714	-27.6%
Maui	276,825	74,974	45,149	208,071	215,713	139,990	193,729	-27.7%
Moloka'i	4,840	1,042	316	2,259	2,582	1,827	2,331	-21.6%
Lāna'i	5,700	1,602	699	5,680	3,688	1,757	3,333	-47.3%
Kaua'i	76,777	22,958	7,660	42,680	56,412	38,884	50,011	-22.2%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	64,877	77,572	-16.4%

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	76,220	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 Diiro 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 Nov. 2024P	YTD Nov. 2023	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,975	6,219	8,566	-27.4%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	312,350	340,921	-8.4%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	346,555	382,424	-9.4%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	16,108	19,600	-17.8%
Convention/Conf.	10,668	4,842	405	6,654	13,665	9,988	13,104	-23.8%
Corp. Meetings	3,072	856	348	5,265	2,724	3,227	2,418	33.4%
Incentive	4,054	995	562	3,308	4,818	3,669	4,566	-19.7%

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 Nov. 2024P	YTD Nov. 2023	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	36.1	38.0	-1.9
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	63.9	62.0	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 Nov. 2024P	YTD Nov. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	142.71	106.87	124.31	-14.0%

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