



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

Visitor Expenditures:	\$1.05 billion
Primary Purpose of Stay:	Pleasure (396,235) vs. MCI (16,621)
Average Length of Stay:	10.87 days
First Time Visitors:	35.4%
Repeat Visitors:	64.6%

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Dec. 2024P	YTD Dec. 2023	% Change
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	982.79	1,051.2	1,230.3	-14.6%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,374,151	4,708,524	5,585,244	-15.7%
Arrivals	540,103	164,393	87,900	414,250	474,727	397,173	433,049	474,727	-8.8%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	11,951	12,865	15,302	-15.9%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	224.7	223.2	220.3	1.4%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,474.5	2,427.4	2,591.6	-6.3%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	11.01	10.87	11.77	-7.6%

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 4, 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 calendar year 2024, there were 433,049 visitors from Canada, compared to 474,727 visitors (-8.8%) in 2023 and 540,103 visitors (-19.8%) in pre-pandemic 2019. Visitors from Canada spent \$1.05 billion in 2024, compared to \$1.23 billion (-14.6%) in 2023 and \$1.08 billion (-2.8%) in 2019. Daily visitor spending in 2024 (\$223 per person) was higher compared to 2023 (\$220 per person, +1.4%) and 2019 (\$165 per person, +35.3%).
- In 2024, 2,344 scheduled flights with 420,172 seats serviced Hawai'i from Canada. In 2023, there were 2,566 scheduled flights (-8.7%) with 466,196 seats (-9.9%). In 2019 there were 2,545 scheduled flights (-7.9%) with 484,613 seats (-13.3%).
- 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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- Economic fears related to potential trade battles and tariffs on Canadian exports to the U.S. are weighing heavily on the Canadian economy according to economists and political commentators. The uncertainty contributed to the largely anticipated resignation of the Prime Minister.
- Statistics Canada indicates that 8.8 percent of Canadian workers work in industries that rely on U.S. demand for Canadian exports.
- The overall uncertainty is contributing to the continued reduction of the value of the Canadian Dollar against the U.S. Dollar. The exchange rate dipped to \$0.69 USD for every Canadian Dollar, a further \$0.02 lower than November 2024. The reduction combined with potential increase in tariffs has heightened media commentary on Canadians reducing their U.S. discretionary travel, but it is too soon to determine the impact.
- The Canadian economy added over 90,000 jobs in December 2024, four times the forecast and the highest number in almost two years. This reduces the national unemployment rate to 6.7 percent, whereas it had been predicted to rise to 6.9 percent.
- While the additional jobs are good news, many economists predict that the Bank of Canada won't reduce interest rates as previously predicted as they try to promote recovery towards a more stable overall economy.
- More than 28.15 million Canadians returned home from an overnight outbound trip throughout the first ten months of 2024. This was 9.6 percent more activity than in 2023, but a similar volume of trips as recorded in 2019 (-0.1%). The volume of transborder trips year-to-date is 1.8 percent lower than in 2023, but slightly above 2019 activity (+0.4%), while overseas activity has reached 99 percent of 2019 volume.
- Nearly 17.3 million Canadians returned home from an overnight transborder trip to the US throughout the first ten months of 2024, a 0.4 percent increase over 2019, but a lower level of activity than seen in 2023 (-1.8%). Trips by air surpassed 8.0 million during the period, a larger volume than reported in 2019 (15.4%) but a 9.8 percent drop compared to 2023. In contrast, trips by auto remain below the level seen in 2019 (-8.3%), but are up 6.1 percent compared to 2023.
- Nearly 6.4 million Canadian arrivals were recorded in Europe and the UK throughout the first ten months of 2024, a larger volume than reported in both 2019 (+12%) and 2023 (+9%). The 2024 summer travel

season (May-Oct) saw a little over 5.0 million arrivals in European destinations. This was 12 percent more activity than recorded in 2019, and an 8 percent increase compared to summer 2023.

- More than 2.5 million Canadian arrivals were recorded in the Asia-Pacific region throughout the first ten months of 2024; 88 percent of the volume seen in 2019 and 29 percent more activity than recorded last year. With arrivals in China and the SAR remaining below pre-pandemic levels, 51 percent of the activity recorded so far this year was to destinations in Oceania and South/Southeast Asia, compared to 48 percent in 2019.
- Destinations in the Caribbean and Latin America reported more than 4.66 million arrivals from Canada throughout the first ten months of 2024, a larger volume than seen in 2019 (+3%) and in 2023 (+8%).
- Recent Consumer Trends:
  - TRAVELSAVERS Canada released the results of what their advisors have identified as the top trending travel types. All-inclusive resort travel is seen as rebounding significantly after a few years of lower results. Bucket list, personalized experience travel, home-style accommodations, and off-the-beaten-path travel rounded out their top trends list. As has been identified elsewhere, cruising has enjoyed a very significant rebound in interest and bookings.
  - A recent study by top Travel Insurance provider Allianz Global Assistance conducted with Ipsos Research, identified a softening in travel intentions in 2025. For winter-escape travel alone, they recorded a 12 percent decrease in Canadians intending on traveling this winter. Results indicated that the desire to make up for lost travel time during the pandemic was no longer a consideration, and the key variables contributing to the reduced intent are financial concerns.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	243,103	244,328	-0.5%
Maui County	278,589	75,634	45,458	209,765	216,895	160,489	216,895	-26.0%
Maui	276,825	74,974	45,149	208,071	215,713	159,338	215,713	-26.1%
Moloka'i	4,840	1,042	316	2,259	2,582	1,989	2,582	-23.0%
Lāna'i	5,700	1,602	699	5,680	3,688	2,054	3,688	-44.3%
Kaua'i	76,777	22,958	7,660	42,680	56,412	44,568	56,412	-21.0%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	74,749	88,214	-15.3%

## 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 January 15, 2025, subject to change.

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

CANADA MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
Group vs True Independent (Net)								
Group Tour	8,494	NA	667	5,226	8,975	6,564	8,975	-26.9%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	356,217	389,480	-8.5%
Leisure vs Business								
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	396,235	436,231	-9.2%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	16,621	20,698	-19.7%
Convention/Conf.	10,668	4,842	405	6,654	13,665	10,331	13,665	-24.4%
Corp. Meetings	3,072	856	348	5,265	2,724	3,335	2,724	22.4%
Incentive	4,054	995	562	3,308	4,818	3,734	4,818	-22.5%

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 Dec. 2024P	YTD Dec. 2023	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	35.4	36.8	-1.4
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	64.6	63.2	1.4

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 Dec. 2024P	YTD Dec. 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	28.09	111.60	142.71	121.94	142.71	-14.6%

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