



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 February 2025 Quick Facts^{1/}

Visitor Expenditures:	\$289.7 million
Primary Purpose of Stay:	Pleasure (94,753) vs. MCI (5,094)
Average Length of Stay:	12.10 days
First Time Visitors:	28.8%
Repeat Visitors:	71.2%

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024P	2025 Annual Forecast*	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	1,051.2	1,043.49	289.7	291.5	-0.6%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,708,524	4,650,865	1,246,407	1,300,031	-4.1%
Arrivals	540,103	164,393	87,900	414,250	474,727	433,049	430,636	102,984	106,050	-2.9%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	12,865	12,742	21,126	21,667	-2.5%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	223.2	224.4	232.4	224.2	3.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,427.4	2,423.1	2,813.0	2,748.2	2.4%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	10.87	10.80	12.10	12.26	-1.3%

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) 2025 annual forecast (Quarter 1, 2025).

Contact Information

Hawai'i Tourism Authority: Jennifer Bastiaanse, Brand Manager
 Tel: (808) 973-2262
jbastiaanse@gohta.net

Hawai'i Tourism Canada: Colin Wood, Account Director
 Telephone: (416) 935-1896 Ext. 229
colin@voxinternational.com

^{1/} 2024P and 2025P 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 two months of 2025, 102,984 visitors arrived from Canada, which was a decrease compared to the first two months of 2024 (106,050 visitors, -2.9%) and the first two months of pre-pandemic 2019 (136,277 visitors, -24.4%). Total spending by Canadian visitors was \$289.7 million, lower than the first two months of 2024 (\$291.5 million, -0.6%) and the first two months of 2019 (\$318.5 million, -9.0%).
- 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%).
- There were 558 scheduled flights with 100,941 seats from Canada in the first two months of 2025. Air capacity decreased compared to the first two months of 2024 (614 flights, -9.1% with 114,020 seats, -11.5%) and the first two months of 2019 (770 flights, -27.5% with 137,674 seats, -26.7%).
- 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%).

Market Conditions

- Unexpectedly and despite the overall economic uncertainty, the Canadian unemployment rate dropped by .1 percent to 6.6 percent, adding jobs in January 2025. With the threat of tariffs from the U.S. and a sharp drop in immigration numbers, however, are likely to impact economic activity, and businesses have reported soft hiring intentions for the year, a central bank survey indicated in The first two months of.
- The Bank of Canada did cut interest rates down to 3 percent in January 2025 despite some predictions that they would not. With the cut, the Bank warned that the economic consequences of a prolonged trade war could be severe. Following the reduction, many economists predicted that further interest rate reductions were unlikely until there is greater confidence in relation to tariffs being applied.
- Tariff-Related Impact
 - Canadian consumer sentiment is shifting. The decision to “buy Canadian” has historically been a secondary consideration. Canadians have generally accepted that they purchase and consume goods from around the world, with a very high percentage of them coming from the U.S. With the threats to the Canadian economy, politicians and commentators have been aggressively promoting a “Buy Canadian” message. This includes choosing to travel within Canada and reducing U.S. discretionary travel. It is too soon to determine the numeric impact. Should a trade war be averted, the impact could be negligible.
 - An element that may help Hawai'i is that there is a physical and psychological separation from the U.S. mainland. Canadians tend to perceive it differently: Native Hawaiian history, unique culture and multi-ethnic makeup of the state. Additionally, Canadians perceive the political sensibilities of Blue State Hawai'i's residents as being more aligned with their own. If U.S. visits were to decrease it does not mean Hawai'i visits will decrease in the same manner.
 - Continuing from December 2024, significant economic fears rattled Canada throughout January 2025. The threatened tariffs that could still be applied on Canadian exports to the U.S., would have a very significant impact on the Canadian economy. The uncertainty and mixed messaging as to what concessions Canada was being asked to make, contributed significantly to a currency exchange rate that continue to dip during The first two months of.
 - Should the tariffs have been applied across all product categories at 25 percent as threatened, economists predicted very significant job losses in Canada, currency value reductions and a high risk of a recession. Statistics Canada indicates that 8.8 percent of Canadian workers work in industries

that rely on U.S. demand for Canadian exports. Those are the jobs at greatest risk in a potential trade war.

- The overall uncertainty is contributing to the continued low value of the Canadian Dollar against the U.S. Dollar. The exchange rate in January 2025 remained at \$0.69 USD for every Canadian Dollar. The low rate leads to frequent media commentary on Canadians reducing their U.S. discretionary travel.
- Canadian Travel Trends
 - A Canadian polling company released the results of a survey that indicated that Canadian travel to the U.S. could drop by as much as 21 percent with President Trump in office. Nearly three in 10 indicated they intend to travel less, which was identified as having significant impact on U.S. tourism as Canadians account for 31 percent of all U.S. visits.
 - A summary of the study also mentioned that during President Trump's first term that Canadian visitation increased by 6.3 percent in 2017 and 4.8 percent in 2018 despite predictions of a downturn.
 - Travel Trade Media platform PAX News conducted an informal survey of Canadian Travel Agents, polling them on the destinations generating interest from Canadian travelers. International travel featured prominently with Japan, Vietnam and Cambodia, Portugal, Italy, Switzerland, The Maldives, and New Zealand receiving votes as destinations Agents recognized as generating more interest than in the past.
 - Tripadvisor released a user's survey that was picked up by Canadian trade media where O'ahu was identified as the second most desirable U.S. destination, second only to New York City and placing ahead of Las Vegas, the Florida Keys, New Orleans, etc.
- Outbound Travel Market
 - More than 30.5 million Canadians returned home from an overnight outbound trip throughout January to Nov 2024. This was 9.1 percent more activity than in 2023 and the same volume of trips as recorded in 2019. The volume of transborder trips year-to-date was 2.0 per cent lower than in 2023 but comparable to 2019 activity (0.2%), while overseas activity reached 99.6 per cent of 2019 volume and surpassed 2023 activity by one-third (33.2%).
 - The first month of the 2024-25 winter travel season (Nov.) saw 1.44 million Canadians return home from an overnight trip to the U.S., a similar volume as 2018-2019 (-0.3%) but a 3.5 percent drop compared to last winter. November 2024 also saw 959,000 overseas trips, a 17.7 percent increase compared to 2018-2019, and a 21.3 percent increase compared to winter 2023-2024.
- Canadian travel to the United States
 - More than 18.74 million Canadians returned home from an overnight transborder trip throughout the first eleven months of 2024, a 0.2 percent increase over 2019, but a lower level of activity than seen in 2023 (-2.0%). Trips by air surpassed 8.86 million during the period, a larger volume than reported in 2019 (14.4%) but a smaller volume than in 2023 (-9.3%). In contrast, there were 8.2 percent fewer trips by auto than in 2019 but 5.6 percent more than in 2023.
 - The first month of the 2024-25 winter travel season (November) saw 1.4 million Canadians return home from an overnight transborder trip, the same volume seen in 2018-2019 but a 3.5 percent drop compared to last winter. Forty-two percent of the trips recorded during the month were by auto compared to 47 percent in 2018-2019.

- Canadian travel to Destinations Outside the United States
 - Europe the United Kingdom - More than 6.76 million Canadian arrivals were recorded in Europe and the UK throughout the first eleven months of 2024, a larger volume than reported in both 2019 (12.3%) and 2023 (10.1%). The first month of the 2024-2025 winter travel season (November) saw 347,000 arrivals in European destinations, 2.8 percent more activity than the same period last winter, and 13.9 percent more activity than in 2018-2019.
 - Asia, Oceania, and the South Pacific - More than 2.86 million Canadian arrivals were recorded in the Asia-Pacific region throughout the first eleven months of 2024, 90 percent of the volume seen in 2019 and 30 percent more activity than the same period in 2023. Fifty-three percent of the activity year-to-date were to destinations in Oceania and South/Southeast Asia, compared to 48 percent in 2019. The first month of the 2024-2025 winter travel season (Nov.) saw 318,000 arrivals in the region, 95 percent of the activity recorded in 2018-2019 and a 26 percent increase over last winter.
 - Caribbean and Latin America - Destinations in the Caribbean and Latin America reported more than 5.25 million arrivals from Canada throughout the first eleven months of 2024, a larger volume than seen in 2019 (4.4%) and in 2023 (7.2%). The first month of the winter travel season saw 587,000 arrivals in the region, compared to 565,000 last winter (4.0%) and 479,000 in 2018-2019 (22.6%).

Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	243,103	54,592	55,441	-1.5%
Maui County	278,589	75,634	45,458	209,765	216,895	160,489	39,869	39,071	2.0%
Maui	276,825	74,974	45,149	208,071	215,713	159,338	39,654	38,809	2.2%
Moloka'i	4,840	1,042	316	2,259	2,582	1,989	683	623	9.6%
Lāna'i	5,700	1,602	699	5,680	3,688	2,054	519	508	2.2%
Kaua'i	76,777	22,958	7,660	42,680	56,412	44,568	11,636	11,237	3.6%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	74,749	19,819	19,425	2.0%

Airlift: Scheduled Seats and Flights

Scheduled seats	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	158,940	74,696	47,390	114,119	395,145	177,186	76,220	44,780	121,986	420,172	-10.3	-2.0	5.8	-6.4	-6.0
Calgary	29,094	9,570	4,524	16,356	59,544	31,548	9,026	4,176	19,388	64,138	-7.8	6.0	8.3	-15.6	-7.2
Edmonton	7,656	1,392		3,828	12,876	7,308	1,914		3,654	12,876	4.8	-27.3		4.8	0.0
Toronto	6,633			2,040	8,673	11,195			2,083	13,278	-40.8			-2.1	-34.7
Vancouver	115,557	63,734	42,866	91,895	314,052	127,135	65,280	40,604	96,861	329,880	-9.1	-2.4	5.6	-5.1	-4.8

Scheduled flights	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	879	434	275	659	2,247	956	437	260	691	2,344	-8.1	-0.7	5.8	-4.6	-4.1
Calgary	137	55	26	94	312	136	46	24	98	304	0.7	19.6	8.3	-4.1	2.6
Edmonton	44	8		22	74	42	11		21	74	4.8	-27.3		4.8	0.0
Toronto	25			8	33	38			8	46	-34.2			0.0	-28.3
Vancouver	673	371	249	535	1,828	740	380	236	564	1,920	-9.1	-2.4	5.5	-5.1	-4.8

Source: DBEDT analysis from Diio Mi seat and flight schedules as of February 21, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Group vs True Independent (Net)									
Group Tour	8,494	NA	667	5,226	8,975	6,564	1,480	2,568	-42.4%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	356,217	83,234	86,404	-3.7%
Leisure vs Business									
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	396,235	94,753	95,689	-1.0%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	16,621	5,094	8,059	-36.8%
Convention/Conf.	10,668	4,842	405	6,654	13,665	10,331	4,383	5,338	-17.9%
Corp. Meetings	3,072	856	348	5,265	2,724	3,335	409	1,933	-78.9%
Incentive	4,054	995	562	3,308	4,818	3,734	466	1,320	-64.7%

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	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	35.4	28.8	30.1	-1.3
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	64.6	71.2	69.9	1.3

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	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
State tax revenue generated (\$ Millions) ^{2/}	126.24	NA	28.09	111.60	142.71	121.94	33.60	33.81	-0.6%

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