



# 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 June 2025 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$587.0 million
Primary Purpose of Stay:	Pleasure (205,672) vs. MCI (9,676)
Average Length of Stay:	11.40 days
First Time Visitors:	32.9%
Repeat Visitors:	67.1%

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD June 2025P	YTD June 2024RP	% Change
Visitor Expenditures* (\$ Millions)	1,081.5	NA	240.6	962.1	1,230.3	1,057.2	1,006.46	587.0	601.8	-2.5%
Visitor Days	6,554,493	2,265,568	1,364,326	5,069,619	5,585,244	4,736,630	4,486,929	2,577,523	2,741,657	-6.0%
Arrivals	540,103	164,393	87,900	414,250	474,727	435,650	413,542	226,021	242,383	-6.8%
Average Daily Census	17,958	6,190	3,738	13,889	15,302	12,942	12,293	14,240	15,064	-5.5%
Per Person Per Day Spending (\$)	165.0	NA	176.4	189.8	220.3	223.2	224.3	227.7	219.5	3.7%
Per Person Per Trip Spending (\$)	2,002.4	NA	2,737.5	2,322.4	2,591.6	2,426.7	2,433.7	2,596.9	2,483.0	4.6%
Length of Stay (days)	12.14	13.78	15.52	12.24	11.77	10.87	10.85	11.40	11.31	0.8%

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 2, 2025).

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Contact Information

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<sup>1/</sup> 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

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- In the first half of 2025, there were 226,021 visitors from Canada, compared to 242,383 visitors (-6.8%) in the first half of 2024 and 315,535 visitors (-28.4%) in the first half of pre-pandemic 2019. Visitors from Canada spent \$587.0 million in the first half of 2025, compared to \$601.8 million (-2.5%) in the first half of 2024 and \$642.8 million (-8.7%) in the first half of 2019. Daily visitor spending in the first half of 2025 of \$228 per person was higher compared to the first half of 2024 (\$220 per person, +3.7%) and the first half of 2019 (\$166 per person, +37.2%).
- In calendar year 2024, there were 435,650 visitors from Canada, compared to 474,727 visitors in 2023 and 540,103 visitors in pre-pandemic 2019. Visitors from Canada spent \$1.06 billion in 2024, compared to \$1.23 billion in 2023 and \$1.08 billion in 2019. Daily visitor spending in 2024 (\$223 per person) was higher compared to 2023 (\$220 per person) and in 2019 (\$165 per person).
- There were 1,271 scheduled flights with 226,478 seats from Canada in the first half of 2025. Air capacity decreased compared to the first half of 2024 (1,393 flights, -8.8% with 253,406 seats, -10.6%) and the first half of 2019 (1,630 flights, -22.0% with 306,686 seats, -26.2%).
- In 2024, 2,344 scheduled flights with 420,172 seats serviced Hawai'i from Canada. In 2023, there were 2,566 scheduled flights with 466,196 seats. In 2019 there were 2,545 scheduled flights with 484,613 seats.

## Market Conditions (Updated Quarterly)

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### Currency/Economy

- Significant economic fears have been causing uncertainty throughout Canada during the entire first quarter of 2025 due to tariffs on exports to the United States and counter-tariffs, including uncertainty and mixed messaging as to what concessions Canada was being asked to make. Contributing to this is also the sentiment related to Canada's sovereignty, which has led for the majority of Canadians to be upset, that has led to a greater movement of supporting their country. Frequent media commentary on Canadians reducing their U.S. discretionary travel also has not helped things.
- Travel from Canadians has decreased significantly throughout the United States, however in Hawai'i, we are so far seeing less of a decline in travel due to our close ties/connection with Canada, high visitorship to Maui and a perceived distance (both location and culturally) of Hawai'i from the United States.
- Economists predicted highly 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.
- 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, businesses have reported soft hiring intentions for the year. Canada's unemployment rate was unchanged in February 2025, holding steady at 6.6 percent, as population growth continued to lose steam and tariff uncertainty shakes the labor market. In March 2025, the unemployment rate in Canada was 6.7 percent.
- 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. In February 2025, the exchange rate remained at \$0.69 USD for every Canadian Dollar.

## Outbound Travel Market

- Nearly 33.1 million Canadians returned home from an overnight outbound trip throughout 2024. This was 9.0 percent more activity than in 2023 and the same volume of trips as recorded in 2019. The volume of transborder trips in 2024 was 1.3 percent lower than in 2023 but similar to 2019 activity (0.3%), while overseas activity reached 99.8 percent of 2019 volume and surpassed 2023 activity by 31 percent.
- More than 5.22 million Canadians returned home from an overnight outbound trip in January and February 2025. This was a similar level of activity as in 2019 (-0.7%), but a 3.8 percent decline compared to 2024. The volume of transborder trips was down 9.8 percent compared to 2024, while overseas activity was up 3.2 percent.
- The first four months of the 2024-25 winter travel season (Nov-Feb) saw 5.6 million Canadians return home from an overnight trip to the United States, a 4.1 percent decrease compared to last winter. The period also saw nearly 4.6 million overseas trips, a 7.8 percent increase over winter 2023-24. Forty percent of the activity recorded during the period was auto trips compared to 45 percent in 2018-2019.

## Consumer Confidence

- The Index of Consumer Confidence rose to 64.7 points in January 2025. Compared to the previous month, January saw a larger share of Canadian consumers report that they were better off financially than they were six months prior.
- Geoeconomic uncertainty has seeped into consumer sentiment. The Index of Consumer Confidence fell to its lowest level ever, dropping to 44.2 points in March 2025. For comparison, the index was 47.6 in April 2019 after the pandemic was declared. While no broad tariffs have been imposed across the border yet, the uncertainty surrounding them is weighing on Canadians.
- As reported in March, a larger share of Canadian consumers reported that they are worse off financially than six months ago (+4.21 points), while an even larger share (+7.89 points) feel that their financial situation will be worse six months from now. Moreover, a much larger share feels there will be fewer jobs in their community in six months (+17.57 points) than reported in January 2025.

## Consumer Trends

- 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.

## 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.
- 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. Surveys of this nature help Travel Agents feel confident in promoting visits.
- Travel agency Flight Centre Travel Group Canada says leisure bookings to American cities dropped 40 percent in February 2025 from the same month in 2024. One in five customers cancelled their trips to the U.S. over the past three months, the report said.

- Canadians planning to shift travel plans away from the United States are likely to visit Mexico, Europe, Iceland, and Asia instead.
- As the “buy Canadian” trend begins to spread across the Nation, Canadians are looking to travel within the country and opting for vacations closer to home.

## Distribution by Island

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
O'ahu	227,491	66,240	36,660	199,898	244,328	244,583	127,112	133,243	-4.6%
Maui County	278,589	75,634	45,458	209,765	216,895	161,411	84,698	90,575	-6.5%
Maui	276,825	74,974	45,149	208,071	215,713	160,251	84,180	89,849	-6.3%
Moloka'i	4,840	1,042	316	2,259	2,582	2,009	1,133	1,638	-30.8%
Lāna'i	5,700	1,602	699	5,680	3,688	2,067	1,227	1,214	1.1%
Kaua'i	76,777	22,958	7,660	42,680	56,412	44,872	23,535	25,864	-9.0%
Island of Hawai'i	97,711	36,732	12,954	67,584	88,214	75,204	40,444	42,634	-5.1%

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## 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	157,548	68,930	44,954	109,456	380,888	177,186	76,220	44,780	121,986	420,172	-11.1	-9.6	0.4	-10.3	-9.3
Calgary	28,746	10,266	4,524	18,872	62,408	31,548	9,026	4,176	19,388	64,138	-8.9	13.7	8.3	-2.7	-2.7
Edmonton	7,482	1,392		4,002	12,876	7,308	1,914		3,654	12,876	2.4	-27.3		9.5	0.0
Toronto	6,633			2,169	8,802	11,195			2,083	13,278	-40.8			4.1	-33.7
Vancouver	114,687	57,272	40,430	84,413	296,802	127,135	65,280	40,604	96,861	329,880	-9.8	-12.3	-0.4	-12.9	-10.0

Scheduled flights	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	871	400	261	613	2,145	956	437	260	691	2,344	-8.9	-8.5	0.4	-11.3	-8.5
Calgary	135	59	26	90	310	136	46	24	98	304	-0.7	28.3	8.3	-8.2	2.0
Edmonton	43	8		23	74	42	11		21	74	2.4	-27.3		9.5	0.0
Toronto	25			8	33	38			8	46	-34.2			0.0	-28.3
Vancouver	668	333	235	492	1,728	740	380	236	564	1,920	-9.7	-12.4	-0.4	-12.8	-10.0

Source: DBEDT analysis from Diio Mi seat and flight schedules as of July 24, 2025, subject to change.

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

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	8,494	NA	667	5,226	8,975	6,600	4,417	4,652	-5.0%
True Independent (Net)	437,503	NA	79,122	344,925	389,480	358,296	178,847	195,291	-8.4%
Leisure vs Business									
Pleasure (Net)	509,578	153,536	81,112	386,503	436,231	398,681	205,672	222,085	-7.4%
MCI (Net)	17,464	6,485	1,280	14,822	20,698	16,686	9,676	12,114	-20.1%
Convention/Conf.	10,668	4,842	405	6,654	13,665	10,370	6,917	7,720	-10.4%
Corp. Meetings	3,072	856	348	5,265	2,724	3,345	1,090	2,537	-57.0%
Incentive	4,054	995	562	3,308	4,818	3,753	1,996	2,569	-22.3%

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.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
First Time Visitors (%)	35.4	NA	24.8	32.2	36.8	35.4	32.9	34.0	-1.0
Repeat Visitors (%)	64.6	NA	75.2	67.8	63.2	64.6	67.1	66.0	1.0

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.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Tax Revenue

CANADA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	126.24	NA	28.09	111.60	142.71	122.63	68.09	69.81	-2.5%

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

P=Preliminary data. RP=March and April 2024 preliminary data were revised.