



Canada Fact Sheet

Canada Overview

VoX International Inc. is contracted by HTA for Brand Marketing Management Services in Canada. Canada is the second-largest international market for the Hawaiian Islands and has an important relationship with Hawai'i, especially the western provinces of British Columbia and Alberta. In addition, Ontario is also a growing market. Canadian Snowbirds spend a great amount of time in Hawai'i during the winter months and many Canadians own real estate throughout the islands.

Strengthening Hawai'i's brand image as a premier destination for Canadians is especially of importance, with initiatives centered around conveying that Canadians are welcomed, deeply valued and grounded in the spirit of aloha. Coinciding with positioning of Hawai'i as being more than a winter escape with shared Canadian interests in mindful travel, cultural immersion, diverse experiences, relaxation, and safety.

Year-to-Date February 2026 Quick Facts^{1/}

Visitor Expenditures:	\$279.0 million
Primary Purpose of Stay:	Pleasure (86,599) vs. MCI (3,828)
Average Length of Stay:	12.94 days
First Time Visitors:	28.8%
Repeat Visitors:	71.2%

	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
CANADA MMA (by Air)										
Visitor Expenditures* (\$ Millions)	NA	240.6	962.1	1,230.3	1,092.1	996.7	970.81	279.0	289.7	-3.7%
Visitor Days	2,265,568	1,364,326	5,069,619	5,585,244	4,886,174	4,373,216	4,174,544	1,242,696	1,246,407	-0.3%
Arrivals	164,393	87,900	414,250	474,727	445,984	394,345	376,599	96,009	102,984	-6.8%
Average Daily Census	6,190	3,738	13,889	15,302	13,350	11,981	11,437	21,063	21,126	-0.3%
Per Person Per Day Spending (\$)	NA	176.4	189.8	220.3	223.5	227.9	232.6	224.5	232.4	-3.4%
Per Person Per Trip Spending (\$)	NA	2,737.5	2,322.4	2,591.6	2,448.8	2,527.6	2,577.8	2,906.2	2,813.0	3.3%
Length of Stay (days)	13.78	15.52	12.24	11.77	10.96	11.09	11.08	12.94	12.10	6.9%

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) 2026 annual forecast (Quarter 1, 2026).

P=Preliminary data.

Contact Information

Hawai'i Tourism Authority: Jennifer Bastiaanse, Brand Manager
 Tel: (808) 973-2262
jennifer.a.bastiaanse@hawaii.gov

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

^{1/} 2026P and 2025P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

^{2/} Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

Market Summary

- In the first two months of 2026, there were 96,009 visitors from Canada compared to 102,984 visitors (-6.8%) in the first two months of 2025. In the first two months of 2026, Canadian visitors spent \$279.0 million and the average daily spending was \$225 per person. In the first two months of 2025, Canadian visitors on all Hawaiian Islands recorded \$289.7 million in total spending and the average daily visitor spending was \$232 per person.
- There were 527 scheduled flights with 98,763 seats from Canada in the first two months of 2026. Air capacity decreased compared to the first two months of 2025 (560 flights, -5.9% with 101,332 seats, -2.5%).
- In 2025, there were 394,345 visitors from Canada compared to 445,984 visitors (-11.6%) in 2024. Visitors from Canada spent \$996.7 million in 2025 compared to \$1,092.1 million (-8.7%) in 2024. Daily visitor spending in 2025 of \$228 per person was higher compared to 2024 (\$223 per person, +2.0%).
- There were 2,133 scheduled flights with 378,835 seats from Canada in calendar year 2025. Air capacity decreased compared to 2024 (2,344 flights, -9.0% with 420,172 seats, -9.8%).

Market Conditions (Updated Quarterly)

Economy

- Canada's overall economy should still be considered as unsteady. For every positive sign, economists are still identifying causes for concern.
- In December 2025, the Canadian economy showed resilience amidst significant trade-related volatility. While growth stabilized following a stronger-than-expected third quarter, the labor market reflected a "low-hire, low-fire" environment characterized by a rising unemployment rate and steady interest rates.
- Employment Growth: The economy added a modest 8,200 jobs in December, following three months of much larger gains. Full-time positions rose by 50,000, while part-time work declined by 42,000. However, the unemployment rate rose to 6.8 percent in December, up from 6.5 percent in November. This increase was primarily driven by more people entering the labor force rather than massive layoffs.
- The Bank of Canada held its policy interest rate at 2.25 percent during its final announcement on December 10, 2025. Most analysts expect the Bank to maintain this rate into early 2026, pending clarity on trade disputes and potential tariff impacts.
- The currency exchange rate did not fluctuate very much in December, hovering between \$0.72 and \$0.73 for every Canadian Dollar exchanged. This is a slight improvement since November. Economists tend to be predicting that the exchange rate will improve for Canadians throughout 2026.

Airlift

- Challenging times for Air Canada with 400 management positions being eliminated include some executives that work with HTCAN. While the layoffs were anticipated, it is a reflection of overall profitability in challenging times partially due to the sentiment towards U.S. travel.

Outbound Travel Market

- The first ten months of 2025 saw 25.4 million Canadians return home from an overnight outbound trip - a 9.7 percent decline compared to 2024. The volume of transborder trips is down 21.3 percent compared to last year, while activity to non-U.S. (overseas) destinations is up 8.9 percent.
- The 2025 summer travel season (May-Oct) saw 7.72 million Canadians return home from an overnight trip to the U.S.; a 26.7 percent drop compared to last summer. The period also saw 6.26 million overseas trips; a 9.2 percent increase compared to 2024.

United States

- More than 13.6 million Canadians returned home from an overnight transborder trip throughout the first ten months of 2025, a 21.3 percent drop compared to 2024. Trips by air reached 7.18 million, compared to 8.0 million last year (-10.9%). Canadians also made 6.1 million trips by auto during the period, a 30.4 percent drop compared to 2024.
- The 2025 summer travel season saw 7.72 million Canadians return home from an overnight U.S. trip; a 26.7 percent drop compared to 2024. The period saw auto trips fall 34.9 percent, while non-auto travel fell 16.2 percent.

Consumer Trends

- Canadian consumer trends for December 2025 were defined by a "resilient but cautious" mindset as shoppers navigated high inflation and trade-related economic uncertainty. Key trends included:
 - Strategic "Deal-Hunting" & Precision Shopping
 - Hyper-focus on Value: Roughly 78 percent of Canadians planned to shop for the best deals, with 85 percent waiting specifically for sales before purchasing.
 - Black Friday Dominance: Black Friday 2025 saw a 25 percent surge in transaction volumes, cementing it as the primary signal for the holiday season.
 - Reduced Self-Gifting: To manage budgets, 81 percent of shoppers considered cutbacks, prioritizing gifts for immediate family while reducing spending on friends, pets, and themselves.
 - Shift in Regional & Brand Loyalty
 - "Made in Canada" Sentiment: While 49 percent of Canadians initially expressed a preference for domestic products to avoid U.S. trade tensions, actual data showed this sentiment softened by December as price became the ultimate deciding factor.
 - Decrease in Cross-Border Shopping: Only 12 percent of Canadians planned physical trips to the U.S. for shopping, down from 20 percent in previous years, largely due to travel tensions and changes in duty-free rules.
 - Evolving Shopping Channels
 - Physical Retail Resilience: Despite the rise of digital tools, 88 percent of holiday spending remained in-store. Shoppers prioritized the "tactile" experience, with 56 percent citing the ability to see and touch products as their primary reason for visiting physical stores.
 - "Hybrid Hustle": 54 percent of Canadians researched products online before entering a physical store to buy.
 - Demographic Spending Gaps
 - High Spenders: The 45–54 age group remained the most consistent high spenders, often managing "sandwich generation" gifting responsibilities for both children and aging parents.
 - Gen Z & Millennials: These groups led the trend in budget cutbacks (Gen Z spending intentions dropped by 34%) but were the primary adopters of new technologies like self-checkout (44%) and mobile payments (41%).

Travel Trends

- U.S. travel by Canadians continued to fall
 - The same dataset highlights that Canadian travel to the United States weakened again, continuing a trend seen throughout 2025. Economic factors such as tariffs, inflation, and a weaker Canadian dollar have been cited in broader 2025 travel analyses as contributing pressures.

- Canadians are closely watching geopolitical developments related to the U.S. that impact their sentiment towards U.S. travel. Even when the actions do not directly involve Canada, they have the potential to slow the pace of recovery to 2024 visitation numbers.
- Overseas travel remained more resilient
 - While U.S. travel dropped, overseas travel earlier in 2025 showed growth, and December data suggests this resilience continued.
 - Canadians have been redirecting trips toward Europe and other long-haul destinations, partly due to economic and political tensions with the U.S.
- Worth noting is significant negative media coverage and confusion in relation to the inconsistent application of new rules for snowbirds intending on staying in the U.S. for longer than 90 days. New procedures that including fingerprinting, are not being well received and will likely reduce the number of snowbirds wintering in the U.S. It would be anticipated by HTCAN that some refinement of the new rules could take place as well as clarity on the new procedures.

Travel behavior

- Immersive and longer trips: Canadians are favoring longer stays to deeply engage with a destination, rather than taking short, simple vacations.
- Multi-generational travel: Families are increasingly planning trips together, with travel groups including multiple generations.
- Wellness and nature focus: Trends include "reset-jetters" seeking health and wellness experiences and "astro-adventures" like viewing the Northern Lights.
- Conscious travel: Travelers are making more conscious decisions about their impact, leading to interest in visiting less-touristed areas and supporting local communities.

Destination trends

- Europe and the United Kingdom: More than 6.5 million Canadian arrivals were recorded in Europe and the UK throughout the first ten months of 2025, a larger volume than reported in both 2019 (14.1%) and 2024 (3.6%).
- Asia, Oceania and the South Pacific: The 2025 summer travel season (May-Oct) saw 1.62 million arrivals in the region, an 8.4 per cent increase compared to summer 2024. More than 3.0 million Canadian arrivals were recorded in the Asia-Pacific region throughout the first ten months of 2025, an 11.5 percent increase compared to 2024. Fifty-one percent of the reported activity was to destinations in China (including S.A.R.), and North Asia, the same share as recorded the previous year.
- Caribbean and Latin America: Destinations in the Caribbean and Latin America reported nearly 5.0 million arrivals from Canada throughout the first ten months of 2025, a similar level of activity as last year (1.3%). Arrivals in Mexico (11.4%) and destinations in South/Central America (1.6%) have increased compared to last year, while total arrivals in Caribbean destinations have decreased 6.3 percent.

Distribution by Island

CANADA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	66,240	36,660	199,898	244,328	247,138	230,751	66,601	54,592	22.0%
Maui County	75,634	45,458	209,765	216,895	167,313	155,314	40,905	39,869	2.6%
Maui	74,974	45,149	208,071	215,713	166,125	154,017	40,701	39,654	2.6%
Moloka'i	1,042	316	2,259	2,582	2,052	2,302	286	683	-58.1%
Lāna'i	1,602	699	5,680	3,688	2,099	3,039	578	519	11.4%
Kaua'i	22,958	7,660	42,680	56,412	46,091	43,222	12,430	11,636	6.8%
Island of Hawai'i	36,732	12,954	67,584	88,214	77,678	70,268	19,761	19,819	-0.3%

P=Preliminary data.

Airlift: Scheduled Seats and Flights

Scheduled Seats	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
CANADA	150,693	67,031	37,820	103,886	359,430	157,548	68,930	44,099	108,258	378,835	-4.4	-2.8	-14.2	-4.0	-5.1
Calgary	28,944	6,500	1,740	15,138	52,322	28,746	10,266	4,524	18,698	62,234	0.7	-36.7	-61.5	-19.0	-15.9
Edmonton	7,482	2,262		4,176	13,920	7,482	1,392		3,828	12,702	0.0	62.5		9.1	9.6
Kelowna	298				298	0				0	NA				NA
Toronto	5,908			0	5,908	6,633			2,169	8,802	-10.9			-100.0	-32.9
Vancouver	108,061	58,269	36,080	84,572	286,982	114,687	57,272	39,575	83,563	295,097	-5.8	1.7	-8.8	1.2	-2.7

Scheduled Flights	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
CANADA	811	383	220	604	2,018	871	400	256	606	2,133	-6.9	-4.3	-14.1	-0.3	-5.4
Calgary	116	34	10	87	247	135	59	26	89	309	-14.1	-42.4	-61.5	-2.2	-20.1
Edmonton	43	13		24	80	43	8		22	73	0.0	62.5		9.1	9.6
Kelowna	1				1	0				0	NA				NA
Toronto	23			0	23	25			8	33	-8.0			-100.0	-30.3
Vancouver	628	336	210	493	1,667	668	333	230	487	1,718	-6.0	0.9	-8.7	1.2	-3.0

Source: DBEDT analysis from Diio Mi seat and flight schedules as of February 23, 2026, subject to change.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	667	5,226	8,975	6,757	6,875	1,735	1,480	17.2%
True Independent (Net)	NA	79,122	344,925	389,480	367,068	312,515	79,701	83,234	-4.2%
Leisure vs Business									
Pleasure (Net)	153,536	81,112	386,503	436,231	408,931	359,118	86,599	94,753	-8.6%
MCI (Net)	6,485	1,280	14,822	20,698	17,229	14,056	3,828	5,094	-24.8%
Convention/Conf.	4,842	405	6,654	13,665	10,696	10,335	3,129	4,383	-28.6%
Corp. Meetings	856	348	5,265	2,724	3,474	1,767	154	409	-62.3%
Incentive	995	562	3,308	4,818	3,872	2,583	597	466	28.2%

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.

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	24.8	32.2	36.8	35.2	34.8	28.8	28.8	0.1
Repeat Visitors (%)	NA	75.2	67.8	63.2	64.8	65.2	71.2	71.2	-0.1

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.

Tax Revenue

CANADA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated (\$ Millions)	NA	28.09	111.60	142.71	152.74	139.40	39.02	40.52	-3.7%

*State government tax revenue generated (direct, indirect, and induced) for 2024, 2025P; year-to-date 2025P and year-to-date 2026P were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.