

Canada Market Update

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Hawai'i Tourism Canada*

2026 Spring Tourism Update





CANADA – CURRENT MARKET CONDITIONS

Travel Sentiment Evolving

- Downturn originally attributed to trade friction and sovereignty comments
- Evolved to include general travel hesitation related to U.S. political activity overall
- Idea of “sending a message” to Washington

NOT a U.S. travel boycott, but still significant

- U.S. travel down roughly 25% in 2025*

...meaning 75% still traveled!

*Centre for Economic Policy Research Data – Mar 2026



CANADA – TRAVEL TRENDS

By Comparison - Hawai'i Specifically

- 2025 Hawai'i arrivals down 11.6%, considerably less than the continental U.S.
- Canada remains the #2 international market for Total Expenditures, Visitor Days, and Arrivals
- #1 market (including U.S.) for average length of stay at 11.09 days
- Per Person and Per Day spend increased in 2025*

Summary

- Canadians are still coming to Hawai'i and planning their future trips.

*All Data – HTA Final 2025 Report





COMPETITIVE LANDSCAPE

Asia, Oceania, South Pacific

- Up 11.3% YOY
- Japan 691K **(+88%)**, India 530K, China 498K, Philippines 312K, South Korea 267K

Europe & UK

- Up 4.1% YOY
- France 1.26M, Italy 1.2M, UK 909K, Portugal 728K, Spain 629K **(+70%)**

Caribbean & Latin America

- Up 2.3% YOY
- Mexico 1.9M **(+15%)**, Dominican Republic 818K, Cuba 559K, Jamaica 291K, Costa Rica 192K

*All Data – Signal 49 Research Report – 2025 totals as reported
January 2026





COMPETITIVE LANDSCAPE – U.S.

Direct Air Arrivals in Select U.S. Destinations (Jan-Dec)

	2019	2024	2025p	ARRIVALS 2025 vs 2024	SEATS 2025 vs 2024
Fort Lauderdale	610,869	830,046	772,194	-7.0%	-5.6%
Fort Myers	159,458	147,142	137,955	-6.2%	-1.4%
Miami	425,963	401,974	353,893	-12.0%	-9.4%
Orlando (MCO, MLB, SFB)	717,543	885,805	797,226	-10.0%	-7.9%
Palm Beach	48,640	36,618	38,452	5.0%	19.9%
Tampa	222,215	219,949	229,199	4.2%	2.4%
Austin	41,101	68,977	76,899	11.5%	18.3%
Dallas	414,581	473,188	477,744	1.0%	5.1%
Houston	522,094	451,008	449,240	-0.4%	2.0%
Los Angeles	1,218,910	1,245,057	999,573	-19.7%	-18.0%
San Diego	167,098	174,468	157,651	-9.6%	-5.7%
San Francisco	930,030	982,236	925,856	-5.7%	-0.4%
Hawaii	404,890	355,203	317,253	-10.7%	-21.6%
Las Vegas	940,344	925,481	693,607	-25.1%	-26.2%
New Orleans	32,195	28,848	20,507	-28.9%	-22.5%
Phoenix (PHX & AZA)	457,042	464,395	426,262	-8.2%	-3.1%

Sources: Respective airport authorities, US BTS, Hawaii Department of Business, Economic Development & Tourism

NOTE: figures represent direct air arrivals from Canada on all major carriers and may include non-residents as well as in-transit passengers.

2025 Rankings

1. Los Angeles
2. San Francisco
3. Orlando
4. Fort Lauderdale
5. Las Vegas

2025 % Decreases

1. New Orleans -28.9%
2. Las Vegas -25.1%
3. Los Angeles -19.7%
4. Miami -12.0%
5. Hawai'i -10.7%



ADDITIONAL TRENDS

Canadians are still traveling extensively

- Domestic travel up 9%
- International travel up 9.2%*

Competitors (old and new) are marketing aggressively

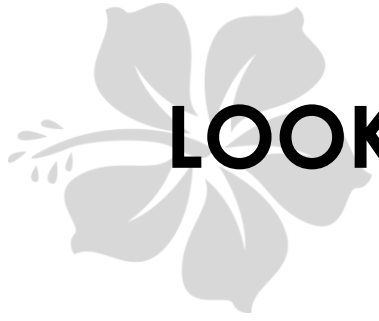
Trips are fewer, but longer and more meaningful

- Less R & R, more active / experience driven

Tips!

- Perception of good offer value is vital
- Canadian specific offers (ex. CAD at par) are well received





LOOKING FORWARD

Canadian market is still sensitive

- If relations or geopolitical situation worsens, expect visitation to dip
- If relations remain the same, visitation will improve gradually as Canadians want to travel freely
- If relations and overall geopolitics improve, U.S. visitation will increase

Additional Variables impacting visit volume

- Currency Exchange Rate – \$1 CAD = \$0.72 USD – 3% increase YOY
- Flight pricing



Q1 ACTIVITIES

Consumer Direct

Winter Olympic TV Ads – *Hawai'i Stays With You (HSWY)*

- Over 442K impressions

High Traffic Advertising - *HSWY*

- Over 1.4 million impressions

Social Media – Over 1.7 million impressions

Connected TV – Over 660,000 impressions

Display Advertising – Over 6 million impressions



High visibility that Hawai'i welcomes Canadians.

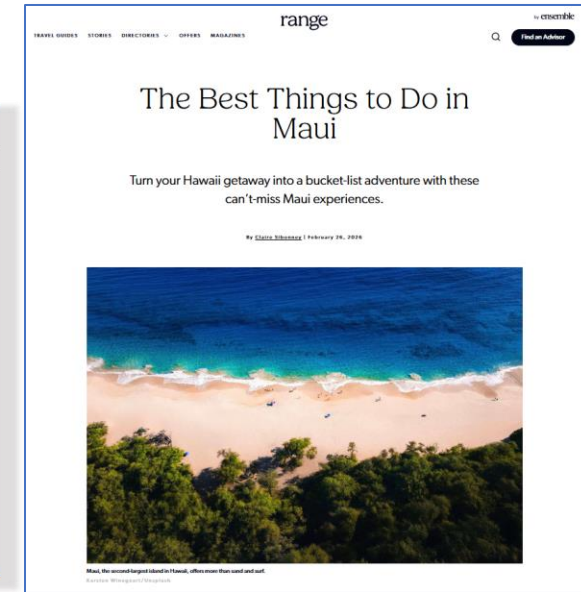
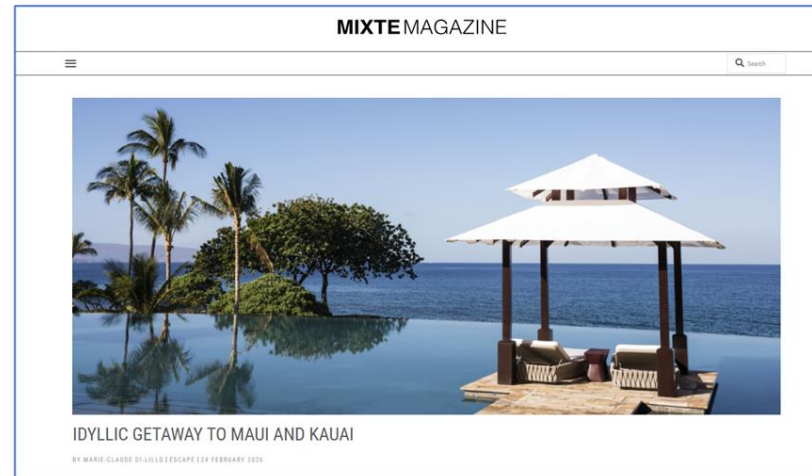




Q1 ACTIVITIES 2

Public Relations

- Rick & Chris Milikan, Inspired 55+ Magazine
 - Visited Maui in early January
- Jody Robbins, CTV Calgary
 - Segment on Spring travel
- Placements in key Canadian publications





Q1 ACTIVITIES 3

Trade

- In-person Travel Advisor training sessions
- Trade Media platform campaigns utilizing HSWY assets

Cooperative Trade Campaigns

- Targeted campaigns generated over 3.2 million impressions



Hawai'i – Flavours perfect for foodie clients

Ranging from the vibrant freshness of poke to the comforting familiarity of a plate lunch and the sweet chill of shave ice, Hawai'i's culinary traditions offer travellers a delicious window into the islands' history, culture, and community. Each dish reflects generations of shared stories, local ingredients, and the spirit of aloha that defines everyday life across the islands.

For your clients, experiencing Hawai'i's food scene is about more than dining, it's about connection. Travellers are encouraged to experience local markets, food trucks, traditional luaus, farm tours, and a wide array of restaurants. All these culinary moments create lasting memories that visitors carry home with them.

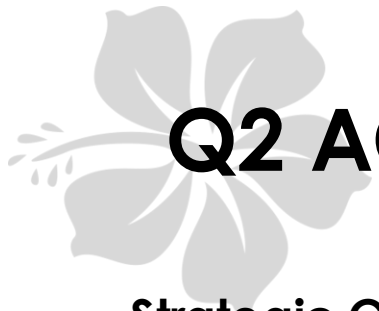
When planning your clients' next Hawai'i escape, be sure to highlight the flavours that make the islands so unforgettable.

[Check out our tasty new video.](#)



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Q2 ACTIVITIES

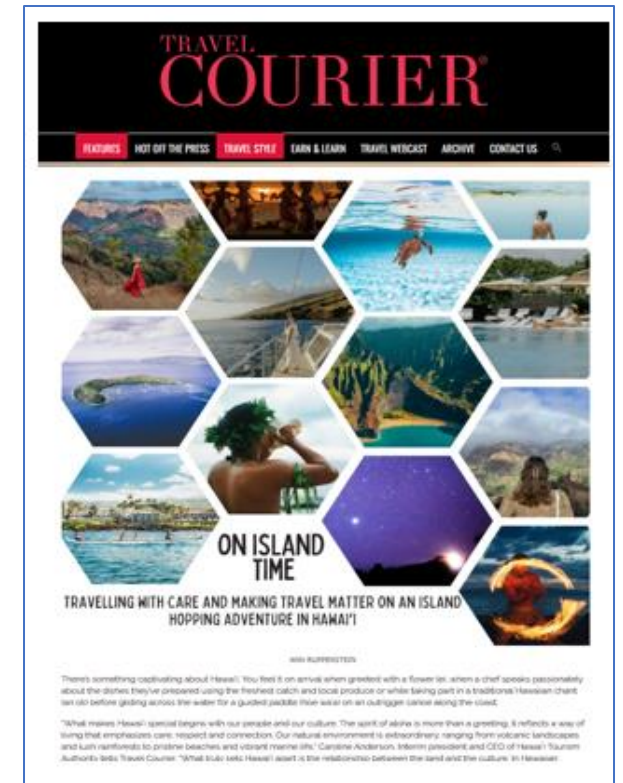
Strategic Objectives

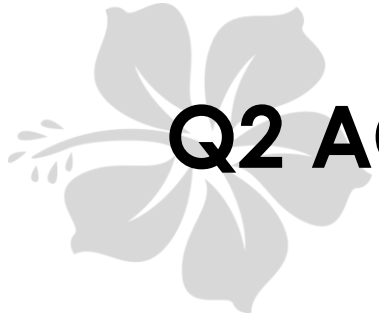
- Continued alignment with HTA priorities (Maui recovery etc.)
- Keeping unique Hawai'i visible with potential Canadian travelers
- Utilize *HSWY* assets extensively

Public Relations

Media Visits

- Chloe Berge, Freelance/Globe and Mail
- Helen Hatzis, TripJaunt.com
- Jennifer Weatherhead, On Air Personality





Q2 ACTIVITIES 2

Public Relations

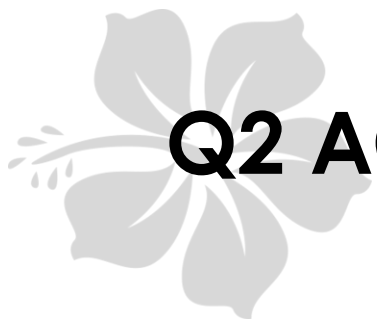
TMAC (Travel Media Association of Canada) Conference

- April 29 – May 3, Vancouver
- One-on-one media appointments, plus networking with travel writers and content creators

Lei Day Activation – May 1

- Inspire affinity and booking curiosity
- TMAC Conference Sponsorship
- Lei Greetings, Material Distribution, Treats, Music, etc.
- Broadcast TV Morning Show Appearance





Q2 ACTIVITIES 3

Consumer Direct

- Ongoing Connected TV & Retargeting Campaigns featuring HSWY assets
- Ongoing Social & Programmatic Display Ads
- New TikTok test campaign

Travel Trade

- Maui Webinar with partners
- Trade FAM to Kaua'i & Maui – May 3-9 (6 Advisors, 1 trade Journalist)
- Ongoing trade media platform campaigns







MAUI LIVE WEBINAR

Your clients will love you for it

Much more than just an island update, this webcast will inspire you with just some of what Maui has to offer. Maui Visitor Bureau representative Brent Lausterer will present, along with Hawai'i experts from Hyatt and Andaz and some of Maui's incredible attractions. This webcast is a must for Advisors who know Maui already and those who are inspired to learn more.

**THURSDAY
April 2, 2026**

**TIME
2:00 pm EST**

[REGISTER NOW](#)

Live attendees have the chance to win an amazing prize package featuring:

A 4-night Maui getaway featuring two nights at the Hyatt Regency Maui Resort and Spa and two nights at the Andaz Maui at Wailea Resort, plus a Maui Pineapple Tour for two and a Maui Visitors Bureau swag bag!

PRESENTERS



BRENT LAUSTERER
Director of Market Activation
and Program Delivery
Maui Visitors and
Convention Bureau



KATHLEEN TABBILOS
Leisure Sales Manager
Andaz Maui Wailea Resort

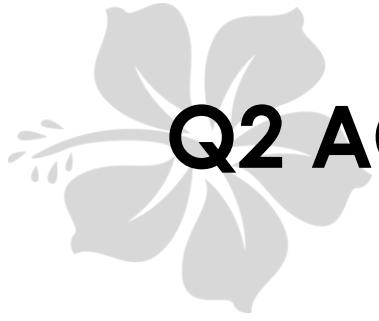


ARY SHAPIRO
Leisure Sales Executive
Hyatt Regency Maui Resort
& Spa



KIANA SMITH
Director of Sales &
Marketing
Hawai'i Farm Project



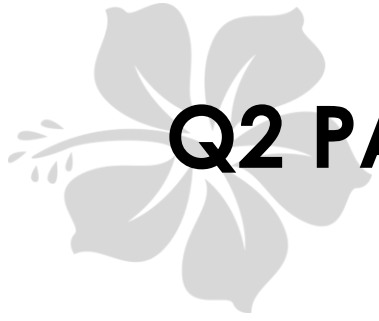


Q2 ACTIVITIES 4

Partner Cooperative

- Ensemble Travel Campaign reaching clients and potential travelers via editorial features, social media posts, e-communications, etc.
- WestJet Vacations and Air Canada / Expedia – Cooperative campaigns targeting and retargeting potential travelers searching for competing destinations





Q2 PARTNERSHIP OPPORTUNITIES

- Advisor Focused FAM – Maui & Kauaʻi
 - Accommodation, Activities, Meals
- Webinar Support
- Individual Journalist & Influencer Visit Support - All Islands
 - Accommodation, Activities, Meals
- Television & Radio Segments
- Quarterly Press Releases

Please reach out for additional details.

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**MAHALO!
THANK YOU!
MERCI!**
