



Canada Fact Sheet

Canada Overview

Canada is Hawai'i's fourth largest source market for visitors to Hawai'i. Weakness in the Canadian economy and devaluation of the Canadian dollar have impacted travel demand for Hawai'i overall. The HTA works with VoX International, its marketing contractor for Canada, to reach aggressive targets set by the HTA and to retain market share.

March 2017 Quick Facts¹

Visitor Expenditures:	\$435.0 million
Primary Purpose of Stay:	Pleasure (185,985) vs. MCI (7,113)
Average Length of Stay:	13.31 days
First Time Visitors:	29.3%
Repeat Visitors:	70.7%

	2015	2016P	% Change 2016P vs 2015	2017 Forecast (Mar. 2017)	% Change 2016P vs 2017 Forecast	YTD Mar. 2017P	YTD Mar. 2016P	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,053.2	958.1	-9.0%	971.2	1.4%	435.0	407.0	6.9%
Visitor Days	6,520,761	6,042,129	-7.3%	6,012,458	-7.8%	2,599,210	2,589,071	0.4%
Arrivals	512,323	478,871	-6.5%	477,941	-6.7%	195,309	188,695	3.5%
Per Person Per Day Spending* (\$)	161.5	158.6	-1.8%	157.0	-2.8%	167.4	157.2	6.5%
Per Person Per Trip Spending* (\$)	2,055.8	2,000.8	-2.7%	2,031.9	-1.2%	2,227.2	2,157.1	3.3%
Length of Stay (days)	12.73	12.62	-0.9%	12.58	-1.2%	13.31	13.72	-3.0%

*Excludes supplemental business spending

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¹ 2016 and 2017 data are preliminary.

Market Summary

- In 2016, decreased arrivals (-6.5% to 478,871 visitors) and lower daily spending (-1.8% to \$158.6 per person) resulted in a drop in visitor expenditures (-9% to \$958.1 million). Through March 2017, arrivals increased 3.5 percent to 195,309 visitors. Even though the average length of stay was shorter (-3% to 13.31 days), a higher daily spending (+6.5% to \$167.4) per person resulted in a visitor expenditure increase (+6.9%) to \$435 million.
- Airlift: in 2016, scheduled seats from Canada rose slightly (+0.7%) compared to 2015. Through March 2017, scheduled seats declined 7.2 percent.

Market Insights

- With a positive start to 2017, the Canadian GDP growth forecast this year has been raised to 2.2%. Despite an elevated debt load, consumers are showing resilience attributable to a solid labor market, credit availability, and the housing wealth effect.
- Canada's currency averaged 76 cents in the first quarter of 2017.
- The national consumer confidence rating was 111.7 points in March, a 1.1-point increase from the previous month, and an impressive 19.5-point jump compared to last year.
- Compared to January 2016, overseas leisure trips grew 2.0 percent while leisure travel to the U.S. increased 7.3 percent. Overseas travel accounted for 50.4 percent of all outbound leisure trips during the month compared to 57.6 percent during the peak travel year of 2014.
- An extensive Western Canada TV promotion took place in Vancouver, Edmonton, Calgary, Regina, Saskatoon, and Winnipeg in March, which generated almost 10 million impressions.

Visitor Statistics

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Visitor Expenditures* (\$ Millions)	1,053.2	958.1	-9.0%	971.2	1.4%	435.0	407.0	6.9%
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*Excludes supplemental business spending

Distribution by Island

CANADA MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Mar. 2017P	YTD Mar. 2016P	% change YTD
O'ahu	218,828	209,315	208,542	71,580	66,101	8.3%
Maui County	269,071	274,008	262,271	98,115	96,758	1.4%
...Maui	267,156	272,174	260,290	97,025	95,921	1.2%
...Moloka'i	4,593	5,367	4,714	1,781	1,810	-1.6%
...Lāna'i	6,401	5,098	4,006	1,662	1,692	-1.8%
Kaua'i	69,476	77,760	74,710	29,231	27,882	4.8%
Island of Hawai'i	97,817	105,460	103,511	41,263	36,949	11.7%

Airlift

	2017					2016					2017 vs. 2016 (%)				
	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD	Q1	Q2	Q3	Q4	YTD
CANADA	184,534	95,333	55,512	116,809	452,188	198,932	93,367	55,116	115,430	462,845	-7.2%	2.1%	0.7%	1.2%	-2.3%
Calgary	30,884	9,031	0	11,199	51,114	30,620	8,187	0	10,988	49,795	0.9%	10.3%	0.0%	1.9%	2.6%
Edmonton	6,812	1,834	0	1,834	10,480	10,120	2,882	0	1,572	14,574	-32.7%	-36.4%	0.0%	16.7%	-28.1%
Toronto	3,666	1,128	0	846	5,640	7,332	846	0	564	8,742	-50.0%	33.3%	0.0%	50.0%	-35.5%
Vancouver	143,172	83,340	55,512	102,930	384,954	149,170	80,932	55,116	102,306	387,524	-4.0%	3.0%	0.7%	0.6%	-0.7%
Victoria	0	0	0	0	0	1,690	520	0	0	2,210	100.0%	100.0%	0.0%	0.0%	100.0%

Source: Diio Mii airline schedules

Group vs. FIT; Leisure vs. Business

CANADA MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Mar. 2017P	YTD Mar. 2016P	% change YTD
Group vs FIT						
Group tour	11,935	9,214	-22.8%	2,694	3,260	-17.3%
True Independent	405,253	376,352	-7.1%	161,869	152,635	6.0%
Leisure vs business						
Pleasure (Net)	475,286	445,724	-6.2%	185,985	177,700	4.7%
MCI (Net)	22,561	17,662	-21.7%	7,113	8,959	-20.6%
Convention/Conf.	16,770	11,481	-31.5%	5,456	6,646	-17.9%
Corp. Meetings	2,706	2,458	-9.2%	694	1,094	-36.5%
Incentive	4,257	4,259	0.0%	1,076	1,524	-29.4%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Mar. 2017P	YTD Mar. 2016P	% change YTD
1st timers (%)	33.8	34.1	1.8	29.3	29.0	0.3
Repeaters (%)	66.2	65.9	-1.8	70.7	71.0	-0.3

Tax Revenue

CANADA MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Mar. 2017P	YTD Mar. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	112.17	111.84	-0.3%	50.78	47.51	6.9%

*State government tax revenue generated (direct, indirect, and induced)

Industry

Major Tour Operators

Presently, the top 7 operators for The Hawaiian Islands, based on room night production reports and confirmation from in-market supplier partners, are:

- Expedia
- Costco Travel
- Pleasant Holidays
- Travelocity
- WestJet Vacations
- TravelBrands
- Air Canada Vacations