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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.

January 2017 Quick Facts¹

Visitor Expenditures: \$158.4 million
 Primary Purpose of Stay: Pleasure (61,460) vs. MCI (3,283)
 Average Length of Stay: 14.19 days
 First Time Visitors: 31.5%
 Repeat Visitors: 68.5%

CANADA MMA (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast (Feb. 2017)	% Change 2016P vs 2017 Forecast	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
Visitor Expenditures* (\$ Millions)	1,053.2	958.1	-9.0%	971.2	1.4%	158.4	159.4	-0.6
Visitor Days	6,520,761	6,042,129	-7.3%	6,012,458	-7.8%	922,978	954,547	-3.3
Arrivals	512,323	478,871	-6.5%	477,941	-6.7%	65,048	63,798	2.0
Per Person Per Day Spending* (\$)	161.5	158.6	-1.8%	157.0	-2.8%	171.7	167.0	2.8
Per Person Per Trip Spending* (\$)	2,055.8	2,000.8	-2.7%	2,031.9	-1.2%	2,435.8	2,498.7	-2.5%
Length of Stay (days)	12.73	12.62	-0.9%	12.58	-1.2%	14.19	14.96	-5.2%

*Excludes supplemental business spending

Contact Information

Hawai'i Tourism Authority: Laci Goshi, Tourism Brand Manager
 Tel: (808) 973-2268
laci@gohta.net

Hawai'i Visitors & Convention Bureau:
 Colin Wood, Account Director
 VoX International
 2 Bloor Street West, Suite 2601
 Toronto, ON M4W 3E2
 Telephone: (416) 935-1896 Ext 229
colin@voxtm.ca

¹ 2016 and 2017 data are preliminary.



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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). In January 2017, arrivals increase 2 percent to 65,048 visitors. Even though daily spending was higher (+2.8% to \$172 per person), a shorter average length of stay (-5.2% to 14.19 days) resulted in a slight drop in visitors expenditures (-0.6%) to \$158.4 million.
- Airlift: in 2016, scheduled seats from Canada rose slightly (+0.7%) compared to 2015. In January 2017, scheduled seats declined 2.7 percent.

Market Conditions

- Canada's economy is expected to grow at a faster pace in 2017, while growth is expected to remain below two percent this year. Exports are expected to pick up and government stimulus spending will help boost growth.
- Canada's currency has been gaining strength against the U.S. dollar in recent months, averaging 75 cents in January 2017.
- The national consumer confidence rating was 101.7 points in January, a slight decrease from the previous month, but an impressive 21.6 point jump compared to last year.

Visitor Statistics

CANADA MMA (by Air)	2013	2014	2015	2016	% Change 2016P vs 2015	2017 Forecast (Feb 2017)	% Change 2017 vs 2016 Forecast	YTD Jan. 2017P	YTD Jan. 2016P	% change YTD
Visitor Expenditures* (\$ Millions)	1,083.0	1,073.4	1,053.2	958.1	-9.0%	971.2	1.4%	158.4	159.4	-0.6
Visitor Days	6,600,896	6,753,350	6,520,761	6,042,129	-7.3%	6,012,458	-7.8%	922,978	954,547	-3.3
Arrivals	517,011	522,761	512,323	478,871	-6.5%	477,941	-6.7%	65,048	63,798	2.0
Per Person Per Day Spending* (\$)	164.1	158.9	161.5	158.6	-1.8%	157.0	-2.8%	171.7	167.0	2.8
Per Person Per Trip Spending* (\$)	2,094.7	2,053.4	2,055.8	2,000.8	-2.7%	2,031.9	-1.2%	2,435.8	2,498.7	-2.5%
Length of Stay (days)	12.77	12.92	12.73	12.62	-0.9%	12.58	-1.2%	14.19	14.96	-5.2%

*Excludes supplemental business spending

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Distribution by Island

CANADA MMA (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
O'ahu	223,283	209,380	218,828	209,315	208,542	25,443	22,842	11.4
Maui County	239,263	257,917	269,071	274,008	262,271	31,915	33,780	-5.5
...Maui	237,434	255,602	267,156	272,174	260,290	31,576	33,448	-5.6
...Moloka'i	4,276	3,927	4,593	5,367	4,714	390	792	-50.8
...Lāna'i	4,801	4,735	6,401	5,098	4,006	493	690	-28.5
Kaua'i	64,128	66,205	69,476	77,760	74,710	9,977	9,754	2.3
Island of Hawai'i	87,703	96,274	97,817	105,460	103,511	14,166	12,530	13.1

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)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
Group vs FIT								
Group tour	9,851	11,536	11,935	9,214	-22.8%	876	1,435	-39.0
True Independent	394,392	407,805	405,253	376,352	-7.1%	54,662	51,830	5.5
Leisure vs business								
Pleasure (Net)	485,635	486,359	475,286	445,724	-6.2%	61,460	59,568	3.2
MCI (Net)	15,143	21,004	22,561	17,662	-21.7%	3,283	4,459	-26.4
Convention/Conf.	10,810	14,379	16,770	11,481	-31.5%	2,502	3,691	-32.2
Corp. Meetings	1,808	4,008	2,706	2,458	-9.2%	357	481	-25.8
Incentive	2,973	3,844	4,257	4,259	0.0%	500	437	14.3

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
1st timers (%)	34.7	34.5	33.8	34.1	1.8	31.5	29.7	1.8
Repeaters (%)	65.3	65.5	66.2	65.9	-1.8	68.5	70.3	-1.8

Tax Revenue

CANADA MMA (by Air)	2013	2014R	2015	2016P	% Change 2016P vs 2015	YTD Jan. 2017P	YTD Jan. 2016F	% change YTD
State tax revenue generated* (\$ Millions)	115.33	114.32	112.17	102.04	-9.0%	16.87	16.98	-0.6%

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



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Industry (Confidential – for internal purposes only)

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:

- | | |
|----------------------|-------------------------|
| 1. Expedia | 5. Westjet Vacations |
| 2. Costco Travel | 6. TravelBrands |
| 3. Pleasant Holidays | 7. Air Canada Vacations |
| 4. Travelocity | |

Major Hotels

In the most recent years, choosing a hotel has weighed heavily on rate as more and more travelers from Canada are focused on value. Destination wedding and honeymoon travelers tend to prefer the higher end hotels.

Hotels	Avid Traveler	Romance
Kaua'i	Outrigger Kiahuna Plantation Courtyard Marriott Kauai Coconut Beach Aston Islander on Beach Plantation Hale Suites Aqua Kaua'i Beach Resort Aston Po'ipū Kai Outrigger Waipouli Beach Resort	Grand Hyatt Kaua'i Kaua'i Marriott Resort Sheraton Kaua'i Resort
O'ahu	Hilton Hawaiian Village Beach Resort & Spa Aston Waikīkī Hyatt Place Waikīkī Aulani Resort & Spa Ohana East Outrigger Reef on the Beach Outrigger Waikīkī on the Beach	Hyatt Regency Waikīkī Halekulani Waikīkī Beach Marriott Sheraton Waikīkī Turtle Bay Resort
Maui	Aston Kā'anapali Shores Aston at the Maui Banyan Royal Lahaina Resort Kā'anapali Beach Hotel Honua Kai Resort & Spa Sugar Beach Maui Kamoaole Outrigger Maui Eldorado Kapalua Villas	Hyatt Regency Maui Wailea Beach Marriott Grand Wailea Westin Maui Resort
Island of Hawai'i	Royal Kona Resort Castle Kona Bali Kai Hilton Waikoloa Village Waikoloa Beach Marriott Resort & Spa Courtyard King Kamehameha Sheraton Keauhou Bay Resort & Spa Royal Sea Cliff by Outrigger King Kamehameha Kona Beach Aston Waikoloa Colony Villas	Fairmont Orchid Mauna Kea Beach Hotel Hapuna Beach Prince