



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.

2017 Quick Facts¹

Visitor Expenditures:	\$1,032.7 million
Primary Purpose of Stay:	Pleasure (488,565) vs. MCI (17,602)
Average Length of Stay:	12.45 days
First Time Visitors:	34.9%
Repeat Visitors:	65.1%

	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,053.2	954.9	-9.3%	1,039.8	8.9%	1,032.7	954.9	8.1%
Visitor Days	6,520,761	5,926,189	-9.1%	6,358,658	-2.5%	6,451,673	5,926,189	8.9%
Arrivals	512,323	469,314	-8.4%	505,127	-1.4%	518,051	469,314	10.4%
Per Person Per Day Spending* (\$)	161.5	161.1	-0.2%	163.5	1.2%	160.1	161.1	-0.7%
Per Person Per Trip Spending* (\$)	2,055.8	2,034.7	-1.0%	2,058.6	0.1%	1,993.4	2,034.7	-2.0%
Length of Stay (days)	12.73	12.63	-0.8%	12.59	-1.1%	12.45	12.63	-1.4%

*Excludes supplemental business spending

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¹ 2016 visitor data are the final numbers and reflect data from the National Travel and Tourism Office and updated reports from airlines. 2017 data are preliminary.

Market Summary

- In 2016, decreased arrivals (-8.4% to 469,314 visitors) resulted in a drop in visitor expenditures (-9.3% to \$954.9 million). Daily spending (-0.2% to \$161 per person) was similar to 2015. In 2017, arrivals increased 10.4 percent to 518,051 visitors, and contributed to a 8.1 percent growth in visitor expenditures to \$1.03 billion. Daily spending (-0.7% to \$160 per person) decreased slightly compared to 2016.
- Airlift: in 2016, scheduled seats from Canada rose slightly (+0.7%) compared to 2015. In 2017, the number of scheduled seats were virtually unchanged from the previous year.

Market Insights

- According to the RBC Economic Outlook quarterly report, Canada's economy is performing well. RBC Economics expects real gross domestic product (GDP) to grow by 2.6 percent in 2017 and 2.1 percent in 2018. With business investment on the rise and government spending on infrastructure ramping up, RBC Economics projects the economy will grow at nearly double the average pace of the prior two years.
- Canada's labor market is strong with November & December showing the best back-to-back gains in 5 years. Overall, 2017 showed the highest annual increase in jobs since 2002. The unemployment rate is the lowest (5.7%) in 40 years.
- The national consumer confidence rating was 128.3 points in December, a much higher level than what was recorded over the past four years. The overall rating was up 24.6 points compared to last year, with strong confidence in all regions boosting the sentiment.
- While consumer confidence remains high, the Canadian Dollar is hovering around \$0.78 to the USD, which can contribute to some consumer hesitancy to travel to the US.
- Even though pricing remains a slight deterrent, the exchange rate is now less of a shock to US travellers. Travel prices are on the rise, but the year-over-year impact is not as significant as the past few years due to the stabilization of the dollar. After averaging \$0.75 USD last winter, the Canadian Dollar has gained some ground.
- Boomers and "zoomers" continue as the hottest outbound market. Canada's aging population will continue to be a positive contributor to growth in outbound leisure travel as the propensity to take outbound leisure trips increases with age. Baby boomers (those born between 1946 and 1964) will continue to drive the outbound leisure travel market during the next five years. In 2017 there are more seniors (65+) in Canada than children. Multi-generational travel, wellness tourism and long stay travel will increase.

Visitor Statistics

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*Excludes supplemental business spending

Distribution by Island

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
O'ahu	208,542	185,680	-11.0%	211,444	185,680	13.9%
Maui County	262,271	244,851	-6.6%	264,612	244,851	8.1%
...Maui	260,290	242,371	-6.9%	262,379	242,371	8.3%
...Moloka'i	4,714	4,441	-5.8%	3,780	4,441	-14.9%
...Lāna'i	4,006	4,029	0.6%	4,750	4,029	17.9%
Kaua'i	74,710	66,873	-10.5%	73,090	66,873	9.3%
Island of Hawai'i	103,511	89,287	-13.7%	103,418	89,287	15.8%

Airlift

DepCityName	2017					2016					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	184,534	95,333	55,512	127,510	462,889	198,932	93,367	55,116	115,430	462,845	-7.2	2.1	0.7	10.5	0.0
Calgary	30,884	9,031	0	11,424	51,339	30,620	8,187	0	10,988	49,795	0.9	10.3	#DIV/0!	4.0	3.1
Edmonton	6,812	1,834	0	1,834	10,480	10,120	2,882	0	1,572	14,574	-32.7	-36.4	#DIV/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	#DIV/0!	50.0	-35.5
Vancouver	143,172	83,340	55,512	113,406	395,430	149,170	80,932	55,116	102,306	387,524	-4.0	3.0	0.7	10.8	2.0
Victoria	0	0	0	0	0	1,690	520	0	0	2,210	-100.0	-100.0	#DIV/0!	#DIV/0!	-100.0

Source: Diio Mii airline schedules, updated December 2017.

Group vs. FIT; Leisure vs. Business

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
Group vs FIT						
Group tour	11,935	9,020	-24.4%	7,938	9,020	-12.0%
True Independent	405,253	369,705	-8.8%	414,359	369,705	12.1%
Leisure vs business						
Pleasure (Net)	475,286	436,912	-8.1%	488,565	436,912	11.8%
MCI (Net)	22,561	17,417	-22.8%	17,602	17,417	1.1%
Convention/Conf.	16,770	11,297	-32.6%	12,125	11,297	7.3%
Corp. Meetings	2,706	2,450	-9.5%	2,414	2,450	-1.5%
Incentive	4,257	4,206	-1.2%	3,565	4,206	-15.2%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
1st timers (%)	33.8	34.1	-0.3	34.9	34.1	0.8
Repeaters (%)	66.2	65.9	0.3	65.1	65.9	-0.8

Tax Revenue

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Dec. 2017P	YTD Dec. 2016	% change YTD
State tax revenue generated* (\$ Millions)	119.02	111.47	-6.3%	120.54	111.47	8.1%

*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