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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 continues to work with the Hawai'i Visitors & Convention Bureau (HVCB), its marketing contractor for Canada, to reach aggressive targets set by the HTA and to retain market share.

Year-to-Date November 2016 Quick Facts¹

Visitor Expenditures: \$831.8 million
 Primary Purpose of Stay: Pleasure (385,088) vs. MCI (16,541)
 Average Length of Stay: 12.61 days
 First Time Visitors: 34.8%
 Repeat Visitors: 65.2%

CANADA MMA (by Air)	2014R	2015	% Change 2015 vs 2014R	2016 Forecast (Oct. 2015)	% Change 2015 vs 2016 Forecast	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Visitor Expenditures* (\$ Millions)	1,073.4	1,053.2	-1.9%	1,143.0	8.5%	831.8	930.7	-10.6%
Visitor Days	6,753,350	6,520,761	-3.4%	6,853,712	5.1%	5,235,777	5,682,456	-7.9%
Arrivals	522,761	512,323	-2.0%	532,168	3.9%	415,280	449,084	-7.5%
Per Person Per Day Spending* (\$)	158.9	161.5	1.6%	166.8	3.3%	158.9	163.8	-3.0%
Per Person Per Trip Spending* (\$)	2,053.4	2,055.8	0.1%	2,147.8	4.5%	2,003.0	2,072.5	-3.4%
Length of Stay (days)	12.92	12.73	-1.5%	12.88	1.2%	12.61	12.65	-0.4%

*Excludes supplemental business spending

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¹ Data for 2014R and 2015 were revised based on updated statistics from the Federal Office of Travel and Tourism Industries (OTTI) and from updated reports from airlines. 2016 data are preliminary.



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Market Summary

- For 2015, arrivals declined 2% to 512,323 visitors and led to a drop in total expenditures to \$1.1 billion (-1.9%). The average daily spending increased YOY by 1.6% to \$162 per person. Through November 2016, decreased arrivals (-7.5% to 415,280 visitors) and lower daily spending (-3.0% to \$158.9 per person) resulted in a drop in visitor expenditures (-10.6% to \$831.8 million).
- Airlift: In 2015, air capacity climbed 14.9% to 459,636 scheduled seats. Increased capacity from Vancouver and seasonal service from Toronto contribute to the boost in air seats from Canada. Through November 2016, scheduled seats from Canada rose slightly (+0.8%) compared to the same period last year.

Market Conditions

- Canada's currency has been gaining strength against the U.S. dollar in recent months, averaging 74 cents in October 2016 from 75 cents in September 2016 and 76 cents in August 2016.
- Canadian consumer confidence index declined to 96.7 percent in October 2016 from 103 in September 2016.
- Canadian remained at 7 percent in October 2016, unchanged from August and September 2016.

Visitor Statistics

CANADA MMA (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	2016 Forecast (Oct. 2015)	% Change 2015 vs 2016 Forecast	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Visitor Expenditures* (\$ Millions)	1,022.8	1,083.0	1,073.4	1,053.2	-1.9%	1,143.0	8.5%	831.8	930.7	-10.6%
Visitor Days	6,497,799	6,600,896	6,753,350	6,520,761	-3.4%	6,853,712	5.1%	5,235,777	5,682,456	-7.9%
Arrivals	499,144	517,011	522,761	512,323	-2.0%	532,168	3.9%	415,280	449,084	-7.5%
Per Person Per Day Spending* (\$)	157.4	164.1	158.9	161.5	1.6%	166.8	3.3%	158.9	163.8	-3.0%
Per Person Per Trip Spending* (\$)	2,049.0	2,094.7	2,053.4	2,055.8	0.1%	2,147.8	4.5%	2,003.0	2,072.5	-3.4%
Length of Stay (days)	13.02	12.77	12.92	12.73	-1.5%	12.88	1.2%	12.61	12.65	-0.4%

*Excludes supplemental business spending

HAWAII TOURISM

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Distribution by Island

CANADA MMA (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
O'ahu	209,380	218,828	209,315	208,542	-0.4%	170,791	184,589	-7.5%
Maui County	257,917	269,071	274,008	262,271	-4.3%	213,909	229,137	-6.6%
...Maui	255,602	267,156	272,174	260,290	-4.4%	211,681	227,328	-6.9%
...Moloka'i	3,927	4,593	5,367	4,714	-12.2%	3,939	4,161	-5.3%
...Lāna'i	4,735	6,401	5,098	4,006	-21.4%	3,810	3,617	5.3%
Kaua'i	66,205	69,476	77,760	74,710	-3.9%	58,681	65,779	-10.8%
Island of Hawai'i	96,274	97,817	105,460	103,511	-1.8%	78,025	91,872	-15.1%

Airlift

	2016 Outlook					2015					2016 Outlook vs. 2015 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	200,073	96,533	52,320	115,783	464,709	186,869	97,877	57,430	117,460	459,636	7.1%	-1.4%	-8.9%	-1.4%	1.1%
Calgary	30,873	9,031	0	10,777	50,681	26,907	7,086	0	9,976	43,969	14.7%	27.4%	NA	8.0%	15.3%
Edmonton	10,162	2,882	0	2,620	15,664	8,073	2,277	0	2,232	12,582	25.9%	26.6%	NA	17.4%	24.5%
Toronto	7,332	846	0	0	8,178	6,440	41,932	57,430	1,120	106,922	13.9%	-98.0%	NA	-100.0%	-92.4%
Vancouver	150,016	83,254	52,320	101,476	387,066	143,817	45,902	0	103,222	292,941	4.3%	81.4%	NA	-1.7%	32.1%
Victoria	1,690	520	0	910	3,120	1,632	680	0	910	3,222	3.6%	-23.5%	NA	0.0%	-3.2%

Source: Diio Mii airline schedules

Group vs. FIT; Leisure vs. Business

CANADA MMA (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
Group vs FIT								
Group tour	11,296	9,851	11,536	11,935	3.5%	8,492	11,181	-24.1%
True Independent	371,840	394,392	407,805	405,253	-0.6%	326,417	352,412	-7.4%
Leisure vs business								
Pleasure (Net)	465,799	485,635	486,359	475,286	-2.3%	385,088	415,403	-7.3%
MCI (Net)	18,745	15,143	21,004	22,561	7.4%	16,541	20,689	-20.1%
Convention/Conf.	13,098	10,810	14,379	16,770	16.6%	10,638	15,052	-29.3%
Corp. Meetings	2,318	1,808	4,008	2,706	-32.5%	2,228	2,601	-14.4%
Incentive	4,009	2,973	3,844	4,257	10.8%	4,197	4,186	0.3%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
1st timers (%)	35.6	34.7	34.5	33.8	-0.7	34.8	34.3	0.5
Repeaters (%)	64.4	65.3	65.5	66.2	0.7	65.2	65.7	-0.5

Tax Revenue

CANADA MMA (by Air)	2012	2013	2014R	2015	% Change 2015 vs 2014R	YTD Nov. 2016P	YTD Nov. 2015F	% change YTD
State tax revenue generated* (\$ Millions)	111.44	115.33	114.32	112.17	-1.9%	88.59	99.12	-10.6%

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