



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.

October 2017 Quick Facts¹

Visitor Expenditures:	\$805.7 million
Primary Purpose of Stay:	Pleasure (372,301) vs. MCI (15,259)
Average Length of Stay:	12.44 days
First Time Visitors:	36.6%
Repeat Visitors:	63.4%

	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,053.2	954.9	-9.3%	1,039.8	8.9%	805.7	739.5	9.0%
Visitor Days	6,520,761	5,926,189	-9.1%	6,358,658	-2.5%	4,940,860	4,587,648	7.7%
Arrivals	512,323	469,314	-8.4%	505,127	-1.4%	397,151	362,632	9.5%
Per Person Per Day Spending* (\$)	161.5	161.1	-0.2%	163.5	1.2%	163.1	161.2	1.2%
Per Person Per Trip Spending* (\$)	2,055.8	2,034.7	-1.0%	2,058.6	0.1%	2,028.8	2,039.3	-0.5%
Length of Stay (days)	12.73	12.63	-0.8%	12.59	-1.1%	12.44	12.65	-1.7%

*Excludes supplemental business spending

Contact Information

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

Hawai'i Tourism Canada: 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 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. Through October 2017, arrivals increased 9.5 percent to 397,151 visitors. Despite a shorter average length of stay (-1.7% to 12.44 days), higher daily spending (+1.2% to \$163 per person) led to a 9 percent growth in visitor expenditures to \$805.7 million.
- Airlift: in 2016, scheduled seats from Canada rose slightly (+0.7%) compared to 2015. Through October 2017, scheduled seats declined 3.1 percent.

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.
- The Canadian Dollar cooled slightly in September from its significant increase in value over the summer, ending the month at \$0.80 to the USD, still a significant improvement from the \$0.72 it dropped to as recently as April.
- The unemployment rate remained at 6.2% for September. For 10 consecutive months, the economy has been adding jobs, the longest streak since 2009. Hourly wages are also increasing at an annual rate of 2.2%.
- The national consumer confidence rating was 112.4 points in September. This was down from last month, but 9.4 points higher than last year. While buying intentions were down in BC, Quebec, and Ontario, thirty percent of Canadians reported that September was a good time to make a major purchase; the same proportion as last year.
- Canadians made 19.5 million overnight trips to the U.S. and other destinations between January-July 2017, an increase of 5.5 percent. Of this total, an estimated 14.8 million trips were for leisure purposes. Compared to 2016, overseas leisure trips grew 4.2 percent while leisure travel to the U.S. increased 3.2 percent. The volume of trips to overseas destinations continued its upward trend, recording the highest figure for July since record-keeping began in 1972. During the first half of the summer season (May to July), Canadians took an estimated 6.6 million outbound leisure trips, a 3.4 percent increase compared to the same period in 2016.
- 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

	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
CANADA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,053.2	954.9	-9.3%	1,039.8	8.9%	805.7	739.5	9.0%
Visitor Days	6,520,761	5,926,189	-9.1%	6,358,658	-2.5%	4,940,860	4,587,648	7.7%
Arrivals	512,323	469,314	-8.4%	505,127	-1.4%	397,151	362,632	9.5%
Per Person Per Day Spending* (\$)	161.5	161.1	-0.2%	163.5	1.2%	163.1	161.2	1.2%
Per Person Per Trip Spending* (\$)	2,055.8	2,034.7	-1.0%	2,058.6	0.1%	2,028.8	2,039.3	-0.5%
Length of Stay (days)	12.73	12.63	-0.8%	12.59	-1.1%	12.44	12.65	-1.7%

*Excludes supplemental business spending

Distribution by Island

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
O'ahu	208,542	185,680	-11.0%	169,839	147,539	15.1%
Maui County	262,271	244,851	-6.6%	200,601	188,515	6.4%
...Maui	260,290	242,371	-6.9%	198,852	186,582	6.6%
...Moloka'i	4,714	4,441	-5.8%	3,060	3,511	-12.8%
...Lāna'i	4,006	4,029	0.6%	3,842	3,380	13.7%
Kaua'i	74,710	66,873	-10.5%	56,251	51,393	9.5%
Island of Hawai'i	103,511	89,287	-13.7%	79,826	68,480	16.6%

Airlift

DepCity	2017					2016					CHANGE2017 vs. 2016 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	184,534	95,333	55,512	125,326	460,705	198,932	93,367	55,116	115,430	462,845	-7.2%	2.1%	0.7%	8.6%	-0.5%
Calgary	30,884	9,031	0	11,424	51,339	30,620	8,187	0	10,988	49,795	0.9%	10.3%		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%		16.7%	-28.1%
Toronto	3,666	1,128	0	846	5,640	7,332	846	0	564	8,742	-50.0%	33.3%		50.0%	-35.5%
Vancouver	143,172	83,340	55,512	111,222	393,246	149,170	80,932	55,116	102,306	387,524	-4.0%	3.0%	0.7%	8.7%	1.5%
Victoria	0	0	0	0	0	1690	520	0		2,210	-100.0%	-100.0%			-100.0%

Source: Diio Mii airline schedules, updated June 2017.

Group vs. FIT; Leisure vs. Business

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
Group vs FIT						
Group tour	11,935	9,020	-24.4%	6,488	7,533	-13.9%
True Independent	405,253	369,705	-8.8%	316,694	285,136	11.1%
Leisure vs business						
Pleasure (Net)	475,286	436,912	-8.1%	372,301	335,551	11.0%
MCI (Net)	22,561	17,417	-22.8%	15,259	15,215	0.3%
Convention/Conf.	16,770	11,297	-32.6%	10,264	9,998	2.7%
Corp. Meetings	2,706	2,450	-9.5%	2,035	2,055	-1.0%
Incentive	4,257	4,206	-1.2%	3,401	3,675	-7.5%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
1st timers (%)	33.8	34.1	-0.3	36.6	35.4	1.2
Repeaters (%)	66.2	65.9	0.3	63.4	64.6	-1.2

Tax Revenue

CANADA MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Oct. 2017P	YTD Oct. 2016	% change YTD
State tax revenue generated* (\$ Millions)	119.02	111.47	-6.3%	94.05	86.32	9.0%

*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