



Canada Fact Sheet

Canada Overview

Canada is the second largest international market and fourth largest source market overall for visitors to Hawai'i. A slowdown in the Canadian economy and a weakened Canadian dollar have impacted the booking pace for the Hawaiian Islands. HTA works with VoX International, its marketing contractor for Canada, to stimulate demand and retain market share while targeting key segments.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures:	\$1.07 billion
Primary Purpose of Stay:	Pleasure (504,902) vs. MCI (17,388)
Average Length of Stay:	12.13 days
First Time Visitors:	35.5%
Repeat Visitors:	64.5%

CANADA MMA (by Air)	2018	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Visitor Expenditures* (\$ Millions)	1,108.5	1,040.6	6.5%	1,085.6	-2.1%	1,073.5	1,108.5	-3.2%
Visitor Days	6,743,492	6,468,689	4.2%	6,557,665	-2.8%	6,493,083	6,743,492	-3.7%
Arrivals	548,702	520,062	5.5%	541,572	-1.3%	535,267	548,702	-2.4%
Per Person Per Day Spending* (\$)	164.4	160.9	2.2%	165.5	0.7%	165.3	164.4	0.6%
Per Person Per Trip Spending* (\$)	2,020.3	2,001.0	1.0%	2,004.6	-0.8%	2,005.6	2,020.3	-0.7%
Length of Stay (days)	12.29	12.44	-1.2%	12.11	-1.5%	12.13	12.29	-1.3%

*Excludes supplemental business spending

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¹ 2019 visitor data are preliminary. 2018 and 2017R visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, and final passenger counts for Airline reports.

Market Summary

In 2018, growth in visitor arrivals (+5.5% to 548,702) and higher daily spending (+2.2% to \$164 per person) contributed to a 6.5 percent increase in visitor expenditures to \$1.11 billion. In 2019, spending by Canadian visitors dropped 3.2 percent to \$1.07 billion. Visitor arrivals (-2.4% to 535,267) and visitor days (-3.7%) decreased while daily visitor spending (+0.6% to \$165 per person) was slightly higher compared 2018.

Airlift: In 2018, scheduled seats from Canada increased (+5.6%), with more seats from Calgary (+11.7%) and Vancouver (+5.1%) offsetting fewer seats from Toronto (-1.6%). In 2019, scheduled air seats dropped slightly (-0.9%) compared to 2018. Increased service from Toronto (+41.3%) were offset by fewer seats from Edmonton (-17.5%) and Calgary (-4.9%).

Market Conditions

- Canada's economy will be supported by strong labor markets and modest growth in consumer spending. Real GDP is forecast to expand by 1.8 percent in 2020 and 1.9 percent in 2021, up slightly from 2019's 1.7 percent gain.
- The loonie has been fairly stable so far this year at 75.3 cents U.S., the year-to-date value is 3.0 percent lower than recorded throughout the same period in 2018. Economists are predicting the exchange rate to move to 77 U.S. cents by the end of 2020.
- The national consumer confidence rating fell significantly in December to reach its lowest point since January 2017. The current rating was 9.9-points below the previous month and 0.9 points lower than last December. Regionally, consumer confidence fell in every region except Quebec, with Ontario, Alberta and British Columbia registering their lowest levels of the year.
- With a population of over 36 million, Canadians made almost 17.5 million overnight trips to the U.S. throughout the first ten months of 2019, compared to 17.1 million last year. While some destinations in Arizona, Hawai'i and Louisiana recorded a decline in air activity so far this year, most of the tracked cities in Florida, California, Texas and Nevada saw an increase in direct arrivals.
- Air Canada and WestJet have extended their grounding of the MAX through April 2020, which has severely affected Air Canada's capacity on the West Coast. According to the airline, more than 20 percent of their flights out of Vancouver and Calgary are being affected, especially in mid-haul destinations like Hawai'i.

Distribution by Island

CANADA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	233,478	213,275	9.5%	222,921	233,478	-4.5%
Maui County	282,463	265,148	6.5%	277,789	282,463	-1.7%
Maui	279,940	262,919	6.5%	276,055	279,940	-1.4%
Moloka'i	3,852	3,767	2.3%	4,700	3,852	22.0%
Lāna'i	6,004	4,765	26.0%	5,567	6,004	-7.3%
Kaua'i	88,711	73,333	21.0%	76,474	88,711	-13.8%
Island of Hawai'i	93,454	103,591	-9.8%	97,265	93,454	4.1%

Airlift

Departure City	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
CANADA	211,342	95,344	50,199	127,728	484,613	189,898	96,158	56,982	145,819	488,857	11.3	-0.8	-11.9	-12.4	-0.9
Calgary	35,054	9,351		10,110	54,515	31,152	8,382		17,807	57,341	12.5	11.6		-43.2	-4.9
Edmonton	6,812	1,834		0	8,646	6,550	2,096		1,834	10,480	4.0	-12.5		100.0	-17.5
Toronto	2,912	2,249		2,682	7,843	3,384	1,128		1,040	5,552	-13.9	99.4		157.9	41.3
Vancouver	166,564	81,910	50,199	114,936	413,609	148,812	84,552	56,982	125,138	415,484	11.9	-3.1	-11.9	-8.2	-0.5

Source: Diio Mii airline schedules, updated January 10, 2020.

Group vs. True Independent; Leisure vs. Business

CANADA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	8,657	7,983	8.4%	8,487	8,657	-2.0%
True Independent (Net)	440,036	415,767	5.8%	433,697	440,036	-1.4%
Leisure vs business						
Pleasure (Net)	519,074	490,425	5.8%	504,902	519,074	-2.7%
MCI (Net)	17,634	17,660	-0.1%	17,388	17,634	-1.4%
Convention/Conf.	11,879	12,174	-2.4%	10,555	11,879	-11.1%
Corp. Meetings	2,413	2,419	-0.2%	3,079	2,413	27.6%
Incentive	4,036	3,573	13.0%	4,083	4,036	1.2%

First Timers vs. Repeat Visitors

CANADA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	36.0	34.9	1.0	35.5	36.0	-0.5
Repeaters (%)	64.0	65.1	-1.0	64.5	64.0	0.5

Tax Revenue

CANADA MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	129.40	121.47	6.5%	125.31	129.40	-3.2%

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