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HTA Release (18-15)

Visitor Spending Generated \$1.69 Billion in January 2018, the Highest Monthly Total in Hawai'i's History

Air Service to Hawai'i Increased 9.7 Percent in January

HONOLULU – Visitors to the Hawaiian Islands spent a total of \$1.69 billion in January 2018, an increase of 4.9 percent compared to January 2017, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA). It was the highest statewide total for visitor spending ever recorded for a single month in Hawai'i's history.

Total arrivals to Hawai'i grew 5.4 percent to 796,483 visitors in January, with total visitor days¹ also increasing (+4.1%) versus a year ago. Growth in arrivals by air service (+6.2% to 784,237) offset fewer arrivals by cruise ships (-29.7% to 12,246). The average daily census², or number of visitors on any given day in January was 259,481, up 4.1 percent compared to January of last year.

Spending by visitors from the U.S. West market increased (+8.3% to \$589.4 million) in January. Total visitor arrivals rose sharply (+14% to 304,091), supported by expanded air service to the neighbor islands. However, the average daily spending by each visitor (-3.7% to \$190 per person) was lower compared to a year ago.

The U.S. East market reported a gain in visitor spending (+4% to \$450.6 million) in January, boosted by increases in visitor arrivals (+3.1% to 177,962) and average daily spending (+4.1% to \$215 per person).

The Japan market saw a decline in visitor spending (-4.2% to \$191.9 million) in January. Visitor arrivals (-3.7% to 118,767) and average daily spending decreased (-1.7% to \$268 per person) versus last year.

There was growth in visitor spending from the Canada market (+6.3% to \$171.1 million) in January. Visitor arrivals (+6.5% to 69,163) and average daily spending (+1% to \$176 per person) increased from a year ago.

Visitor spending increased on Maui (+18% to \$548.5 million), the island of Hawai'i (+1.8% to \$268.2 million) and Kaua'i (+2.3% to \$191.2 million) in January, all of which were the highest monthly totals ever recorded for each island. Visitor spending on O'ahu declined slightly (-1.9% to \$662.0 million) in January compared to last year.

A total of 1,123,132 trans-Pacific air seats serviced the Hawaiian Islands in January, an increase of 9.7 percent from a year ago. Growth in air seats from Other Asia (+17.1%), U.S. West (+13.6%), U.S. East (+9.5%), Oceania (+5.4%) and Canada (+2.9%) offset a slight decline in seats from Japan (-1.3%).

¹ Aggregate number of days stayed by all visitors.

² Average daily census is the average number of visitors present on a single day.

Other Highlights:

- **U.S. West:** Arrivals from the Mountain (+15.3%) and Pacific (+13.3%) regions increased sharply in January versus a year ago, with more visitors from Utah (+21.2%), California (+14.2%), Colorado (+14.1%), Oregon (+12.5%), Washington (+10.2%) and Arizona (+8.5%).
- **U.S. East:** Growth in visitor arrivals from the West South Central (+7.5%), East North Central (+7%), West North Central (+4.7%), East South Central (+4.5%) and South Atlantic (+3.5%) regions offset fewer visitors from the New England (-4.5%) and Mid Atlantic (-4.3%) regions.
- **Japan:** Stays in timeshare properties increased (+8.2%) in January compared to a year ago. More visitors made their own travel arrangements (+22.9%), while fewer visitors purchased package trips (-18.6%) and group tours (-8.7%).
- **Canada:** More visitors stayed in hotels (+10.5%) compared to January 2017. Stays in rental homes (+14.7%) also increased from last year.
- **MCI:** A total of 53,619 visitors came for meetings, conventions and incentives (MCI) in January, a decrease of 11.5 percent from a year ago. More visitors traveled on incentive trips (+11.4%) but fewer came to attend conventions (-19.2%) and corporate meetings (-3.3%).

Highlights from All Other Markets:

In January, combined visitor spending from All Other International Markets increased (+5.9% to \$280.7 million), boosted by growth in visitor arrivals (+3.1% to 114,253 visitors) and higher average daily spending (+9% to \$253 per person).

- **Oceania:** Visitor arrivals increased (+4.2%) in January with growth in arrivals from New Zealand (+19.3% to 4,707) and Australia (+2.1% to 28,404).
- **Other Asia:** Visitor arrivals were up 5 percent in January. Visitor arrivals from Korea rose (+22.9% to 29,913) versus a year ago, supported by increased air service from Seoul. However, arrivals were down from China (-21.4% to 11,562) and Taiwan (-15.7% to 1,686). A shift in the Lunar New Year Holiday to February in 2018 from January in 2017 may have contributed to the declines for these markets.
- **Europe:** Combined visitor arrivals from Europe (United Kingdom, France, Germany, Italy and Switzerland) decreased (-2.7% to 7,620) in January compared to a year ago.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina increased (+19.2% to 3,210) in January versus last year.

Island Highlights:

- **O'ahu:** Visitor spending decreased in January (-1.9% to \$662 million) year-over-year. While total visitor days rose 2.6 percent, the average daily spending declined (-4.5% to \$195 per person) compared to last January. Arrivals were up (+3.1% to 460,518) with more visitors from U.S. West (+13%), Canada (+5.5%) and U.S. East (+1.9%) offsetting fewer visitors from Japan (-6.9%). The average daily census rose 2.6 percent to 109,331 visitors in January.
- **Maui:** Visitor spending rose significantly in January (+18% to \$548.5 million) to the highest monthly total ever recorded, boosted by growth in visitor days (+5.3%) and higher average daily spending (+12% to \$253 per person). Arrivals increased (+5.6% to 230,581) with more visitors

from U.S. West (+14.3%), Canada (+7.8%) and U.S. East (+5%) but fewer visitors from Japan (-2.3%). The average daily census increased 5.3 percent to 69,808 visitors in January.

- **Island of Hawai'i:** Visitor spending grew in January (+1.8% to \$268.2 million) to the highest monthly total ever recorded. Although visitor days (+4.6%) increased, the average daily spending was lower (-2.6% to \$190 per person) compared to a year ago. Arrivals were up (+4.8% to 158,357), with growth in visitors from U.S. West (+9.4%), Japan (+7.5%), Canada (+4.8%) and U.S. East (+2.3%). The average daily census grew 4.6 percent to 45,456 visitors in January.
- **Kaua'i:** Visitor spending increased in January (+2.3% to \$191.2 million) to the highest monthly total ever recorded, bolstered by growth in visitor days (+8.8%). However, the average daily spending (-6% to \$198 per person) declined compared to last January. Visitor arrivals grew (+10% to 109,283), with more visitors from U.S. West (+16.6%), Canada (+7.1%) and U.S. East (+3.6%) offsetting fewer visitors from Japan (-17.8%). The average daily census rose 8.8 percent to 31,131 visitors in January.

Air Seats to Hawai'i:

In January, total air seat capacity rose 9.7 percent to 1,123,132 seats with growth in scheduled seats (+9.8% to 1,115,800) offsetting fewer charter seats (-4.9% to 7,332) compared to last January. There were significantly more seats serving Hilo (+63.6%), Līhu'e (+42.6%) and Kona (+33.5%), along with increases for Kahului (+7.4%) and Honolulu (+4.4%).

- The number of scheduled seats from U.S. West jumped 13.6 percent in January, boosted by double-digit growth in seats from Denver (+52%), Los Angeles (+15.6%), Salt Lake City (+44.3%), San Francisco (+26.1%) and San Jose (+15.1%), as well as increases from Portland (+8.7%) and Seattle (+7.8%).
- Scheduled seats serving U.S. East increased (+9.5%) in January compared to a year ago. Growth in seats from Chicago (+50.4%), Dallas (+16.3%), Houston (+5.8%), Newark (+11.7%) and Washington D.C. (+26.3%) offset fewer seats from New York City's John F. Kennedy International Airport (-29.1%).
- Scheduled seats from Japan declined in January (-1.3%). Seat capacity to Kona from Japan nearly tripled (+156% to 9,783 seats), with the launch of nonstop service from Narita in September 2017. A low-cost carrier serving the Kuala Lumpur-Osaka-Honolulu route (+6,786 seats) and a low-cost carrier serving the Singapore-Osaka-Honolulu route (+5,900 seats) combined added nearly 13,000 new seats in January year-over-year. However, these increases were offset by a loss of 7,400 seats as an international carrier discontinued service on the Haneda-Honolulu route after the first week of January. A U.S. carrier also reduced service on its Narita-Honolulu route (-5,000 seats) and reconfigured its aircraft with fewer seats on the Osaka-Honolulu route (-1,500 seats).
- Scheduled air seats from Canada increased (+2.9) in January, with more seats from Vancouver (+4.6%) offsetting fewer seats from Edmonton (-10%) and Toronto (-20%).
- Scheduled air seats from Oceania grew in January (+5.4%) compared to a year ago mainly due to more seats being added from Auckland, New Zealand (+22.3%). Total seats from Brisbane, Melbourne and Sydney, Australia rose slightly (+0.9%) compared to a year ago.
- Seats from the Other Asia markets rose in January (+17.1%) year-over-year, bolstered by significantly more seats from Seoul (+33.4%). Total seats from Beijing and Shanghai decreased (-14.3%) and there were also fewer seats from Taiwan (-1%).

Cruise Ship Visitors:

- In January, nine out-of-state cruise ships brought 12,246 visitors to Hawai'i compared to twelve ships that carried 17,430 visitors in January 2017. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai'i home-ported cruise ship) decreased (-19.5% to 21,409) compared to January 2017.
- Six out of ten cruise visitors (60%) in January were repeat visitors to the Hawaiian Islands. Most visitors (86.1%) came for a leisure trip, while 10.2 percent visited friends and relatives during their cruise, and 1.7 percent were on their honeymoon.

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Tables of visitor characteristic and expenditure statistics by visitor market, including data presented in the news release are available for viewing online at:

www.hawaiiourismauthority.org/research/research/visitor-highlights/

Detailed monthly visitor characteristics data tables for each visitor market; Fact Sheets with visitor statistics visitor highlights and economic data for the State of Hawai'i, island counties and selected visitor markets have been posted at:

www.hawaiiourismauthority.org/research/reports/major-market-areas/

About the Hawai'i Tourism Authority

The [Hawai'i Tourism Authority](http://www.hawaiiourismauthority.org) is responsible for strategically managing the State of Hawai'i's marketing initiatives to support tourism. HTA's goal is to optimize tourism's benefits for Hawai'i, while being attentive to the interests of travelers, the community and visitor industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure the sustainability of tourism's success.

For more information about HTA, please visit www.hawaiiourismauthority.org. Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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JANUARY 2018 ARRIVALS AT A GLANCE

CATEGORY AND MMA	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES (\$mil.)	1,687.8	1,609.5	4.9	1,687.8	1,609.5	4.9
Total by air	1,683.9	1,603.8	5.0	1,683.9	1,603.8	5.0
U.S. West	589.4	544.0	8.3	589.4	544.0	8.3
U.S. East	450.6	433.1	4.0	450.6	433.1	4.0
Japan	191.9	200.4	-4.2	191.9	200.4	-4.2
Canada	171.1	161.0	6.3	171.1	161.0	6.3
All Others	280.7	265.2	5.9	280.7	265.2	5.9
Visitor arrivals by cruise ships	3.9	5.7	-31.4	3.9	5.7	-31.4
TOTAL VISITOR DAYS	8,043,903	7,727,309	4.1	8,043,903	7,727,309	4.1
Total by air	7,989,370	7,647,469	4.5	7,989,370	7,647,469	4.5
U.S. West	3,096,462	2,750,838	12.6	3,096,462	2,750,838	12.6
U.S. East	2,094,133	2,095,246	-0.1	2,094,133	2,095,246	-0.1
Japan	715,055	733,521	-2.5	715,055	733,521	-2.5
Canada	974,439	925,661	5.3	974,439	925,661	5.3
All Others	1,109,281	1,142,204	-2.9	1,109,281	1,142,204	-2.9
Visitor arrivals by cruise ships	54,532	79,840	-31.7	54,532	79,840	-31.7
VISITOR ARRIVALS	796,483	755,989	5.4	796,483	755,989	5.4
Total by air	784,237	738,559	6.2	784,237	738,559	6.2
U.S. West	304,091	266,770	14.0	304,091	266,770	14.0
U.S. East	177,962	172,670	3.1	177,962	172,670	3.1
Japan	118,767	123,390	-3.7	118,767	123,390	-3.7
Canada	69,163	64,935	6.5	69,163	64,935	6.5
All Others	114,253	110,795	3.1	114,253	110,795	3.1
Visitor arrivals by cruise ships	12,246	17,430	-29.7	12,246	17,430	-29.7
AVERAGE LENGTH OF STAY	10.10	10.22	-1.2	10.10	10.22	-1.2
Total by air	10.19	10.35	-1.6	10.19	10.35	-1.6
U.S. West	10.18	10.31	-1.3	10.18	10.31	-1.3
U.S. East	11.77	12.13	-3.0	11.77	12.13	-3.0
Japan	6.02	5.94	1.3	6.02	5.94	1.3
Canada	14.09	14.26	-1.2	14.09	14.26	-1.2
All Others	9.71	10.31	-5.8	9.71	10.31	-5.8
Visitor arrivals by cruise ships	4.45	4.58	-2.8	4.45	4.58	-2.8
PER PERSON PER DAY SPENDING (\$)	209.8	208.3	0.7	209.8	208.3	0.7
Total by air	210.8	209.7	0.5	210.8	209.7	0.5
U.S. West	190.4	197.8	-3.7	190.4	197.8	-3.7
U.S. East	215.2	206.7	4.1	215.2	206.7	4.1
Japan	268.4	273.2	-1.7	268.4	273.2	-1.7
Canada	175.6	174.0	1.0	175.6	174.0	1.0
All Others	253.1	232.2	9.0	253.1	232.2	9.0
Visitor arrivals by cruise ships	72.2	71.9	0.4	72.2	71.9	0.4
PER PERSON PER TRIP SPENDING (\$)	2,119.1	2,129.0	-0.5	2,119.1	2,129.0	-0.5
Total by air	2,147.2	2,171.5	-1.1	2,147.2	2,171.5	-1.1
U.S. West	1,938.4	2,039.3	-5.0	1,938.4	2,039.3	-5.0
U.S. East	2,532.2	2,508.3	1.0	2,532.2	2,508.3	1.0
Japan	1,615.8	1,623.8	-0.5	1,615.8	1,623.8	-0.5
Canada	2,474.5	2,479.8	-0.2	2,474.5	2,479.8	-0.2
All Others	2,457.2	2,393.8	2.6	2,457.2	2,393.8	2.6
Visitor arrivals by cruise ships	321.5	329.3	-2.4	321.5	329.3	-2.4

P=Preliminary data.

Source:Haw aii Tourism Authority

JANUARY 2018 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES (\$mil.)	1,687.8	1,609.5	4.9	1,687.8	1,609.5	4.9
Total by air	1,683.9	1,603.8	5.0	1,683.9	1,603.8	5.0
O'ahu	662.0	675.1	-1.9	662.0	675.1	-1.9
Maui	548.5	464.7	18.0	548.5	464.7	18.0
Moloka'i	2.8	6.0	-53.1	2.8	6.0	-53.1
Lāna'i	11.3	7.7	45.8	11.3	7.7	45.8
Kaua'i	191.2	187.0	2.3	191.2	187.0	2.3
Haw ai'i Island	268.2	263.3	1.8	268.2	263.3	1.8
Visitor arrivals by cruise ships	3.9	5.7	-31.4	3.9	5.7	-31.4
TOTAL VISITOR DAYS	8,043,903	7,727,309	4.1	8,043,903	7,727,309	4.1
Total by air	7,989,370	7,647,469	4.5	7,989,370	7,647,469	4.5
O'ahu	3,389,264	3,302,021	2.6	3,389,264	3,302,021	2.6
Maui	2,164,042	2,054,585	5.3	2,164,042	2,054,585	5.3
Moloka'i	36,624	38,857	-5.7	36,624	38,857	-5.7
Lāna'i	25,224	16,998	48.4	25,224	16,998	48.4
Kaua'i	965,067	887,404	8.8	965,067	887,404	8.8
Haw ai'i Island	1,409,150	1,347,604	4.6	1,409,150	1,347,604	4.6
Visitor arrivals by cruise ships	54,532	79,840	-31.7	54,532	79,840	-31.7
VISITOR ARRIVALS	796,483	755,989	5.4	796,483	755,989	5.4
Total by air	784,237	738,559	6.2	784,237	738,559	6.2
O'ahu	460,518	446,571	3.1	460,518	446,571	3.1
Maui	230,581	218,414	5.6	230,581	218,414	5.6
Moloka'i	5,243	5,536	-5.3	5,243	5,536	-5.3
Lāna'i	6,238	4,639	34.5	6,238	4,639	34.5
Kaua'i	109,283	99,355	10.0	109,283	99,355	10.0
Haw ai'i Island	158,357	151,112	4.8	158,357	151,112	4.8
Visitor arrivals by cruise ships	12,246	17,430	-29.7	12,246	17,430	-29.7
AVERAGE LENGTH OF STAY	10.10	10.22	-1.2	10.10	10.22	-1.2
Total by air	10.19	10.35	-1.6	10.19	10.35	-1.6
O'ahu	7.36	7.39	-0.5	7.36	7.39	-0.5
Maui	9.39	9.41	-0.2	9.39	9.41	-0.2
Moloka'i	6.99	7.02	-0.5	6.99	7.02	-0.5
Lāna'i	4.04	3.66	10.4	4.04	3.66	10.4
Kaua'i	8.83	8.93	-1.1	8.83	8.93	-1.1
Haw ai'i Island	8.90	8.92	-0.2	8.90	8.92	-0.2
Visitor arrivals by cruise ships	4.45	4.58	-2.8	4.45	4.58	-2.8
PER PERSON PER DAY SPENDING (\$)	209.8	208.3	0.7	209.8	208.3	0.7
Total by air	210.8	209.7	0.5	210.8	209.7	0.5
O'ahu	195.3	204.4	-4.5	195.3	204.4	-4.5
Maui	253.4	226.2	12.0	253.4	226.2	12.0
Moloka'i	76.4	153.4	-50.2	76.4	153.4	-50.2
Lāna'i	447.6	455.7	-1.8	447.6	455.7	-1.8
Kaua'i	198.1	210.7	-6.0	198.1	210.7	-6.0
Haw ai'i Island	190.3	195.4	-2.6	190.3	195.4	-2.6
Visitor arrivals by cruise ships	72.2	71.9	0.4	72.2	71.9	0.4
PER PERSON PER TRIP SPENDING (\$)	2,119.1	2,129.0	-0.5	2,119.1	2,129.0	-0.5
Total by air	2,147.2	2,171.5	-1.1	2,147.2	2,171.5	-1.1
O'ahu	1,437.5	1,511.7	-4.9	1,437.5	1,511.7	-4.9
Maui	2,378.6	2,127.8	11.8	2,378.6	2,127.8	11.8
Moloka'i	533.4	1,076.3	-50.4	533.4	1,076.3	-50.4
Lāna'i	1,809.8	1,669.5	8.4	1,809.8	1,669.5	8.4
Kaua'i	1,749.4	1,881.7	-7.0	1,749.4	1,881.7	-7.0
Haw ai'i Island	1,693.3	1,742.4	-2.8	1,693.3	1,742.4	-2.8
Visitor arrivals by cruise ships	321.5	329.3	-2.4	321.5	329.3	-2.4

P=Preliminary data.

Source:Haw ai'i Tourism Authority