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HTA Release (17-51)

## **Hawai'i Visitor Spending Increased 4.5 Percent to \$1.29 Billion in November 2017**

**HONOLULU** – Visitors to the Hawaiian Islands spent a total of \$1.29 billion in November 2017, an increase of 4.5 percent compared to a year ago, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA). Total visitor arrivals grew 7.3 percent to 748,303 visitors, comprising of arrivals from air service (+7.5% to 738,519) and cruise ships (-1.2% to 9,784).

Spending by visitors from the U.S. West market rose (+8.7% to \$500.9 million) in November. Both total visitor arrivals (+9.1% to 322,195) and average daily spending by each visitor (+1.6% to \$176 per person) increased from last November.

The U.S. East market reported a gain in visitor spending (+5.2% to \$266 million) in November, boosted by increases in visitor arrivals (+4% to 132,683) and average daily spending (+2.4% to \$210 per person).

The Japan market saw a decrease in visitor spending (-6.2% to \$183.3 million) in November. While visitor arrivals (+0.2% to 130,168) and average length of stay (+0.7% to 5.64 days) were comparable to a year ago, average daily spending declined (-7% to \$250 per person).

There was strong growth in visitor spending from the Canada market (+11.5% to \$96.4 million) in November. A substantial increase in visitor arrivals (+18.4% to 51,785) offset a decrease in average daily spending (-3.2% to \$156 per person) compared to last November.

Combined visitor spending from All Other International markets increased (+2.2% to \$239 million) in November, boosted by growth in visitor arrivals (+11.9% to 101,688) year-over-year.

All four larger Hawaiian Islands saw growth in visitor spending and arrivals in November compared to last year.

Total air seats serving Hawai'i rose (+5% to 964,993) in November year-over-year, with increases in scheduled air seats from Canada (+21.4%), Other Asia (+20.1%), Oceania (+6.3%), U.S. West (+3.9%), Japan (+2.1%) and U.S. East (+1.1%).

### Year-to-Date 2017

Through the first 11 months of 2017, visitor spending (+6.6% to \$15.15 billion) exceeded the results from the same period last year, bolstered by growth in visitor arrivals (+4.9% to 8,502,545) and average daily spending (+1.8% to \$200 per person).

Visitor spending has increased from U.S. West (+9.8% to \$5.57 billion), U.S. East (+10.2% to \$3.82 billion), Japan (+8.3% to \$2.05 billion) and Canada (+9.2% to \$902.1 million), but declined from All Other International markets (-5% to \$2.77 billion).

Year-to-date, visitor arrivals have increased from U.S. West (+4.7% to 3,482,253), U.S. East (+5.8% to 1,806,312), Japan (+5.8% to 1,442,675), Canada (+10.5% to 448,936) and All Other International markets (+0.8% to 1,207,789).

### Other Highlights:

- **U.S. West:** In November, there was growth in visitor arrivals from the Mountain (+11%) and Pacific (+9.4%) regions compared to a year ago, boosted by more visitors from Utah (+25.3%), Colorado (+11.4%), California (+10.5%) and Washington (+8.3%). Through the first 11 months, arrivals rose from the Mountain (+6.1%) and Pacific (+4.1%) regions compared to last year.
- **U.S. East:** Visitor arrivals increased from every region in November except the East South Central region (-11.9%). Year-to-date, arrivals were up from all regions compared to the first 11 months of 2016.
- **Japan:** Fewer visitors stayed in hotels (-1.9%) in November while condominium usage rose (+14.9%) compared to a year ago. November marked the eighth consecutive month of double-digit growth in condominium stays.
- **Canada:** Significantly more visitors stayed in hotels (+25.4%) in November versus last year. Stays in rental homes (+15.5%) and timeshare units (+13%) also increased in November compared to a year ago.
- **MCI:** Visitors coming to Hawai'i for meetings, conventions and incentives (MCI) increased in November (+14.7% to 39,612) year-over-year. Significantly more visitors came for conventions (+74.5% to 22,184), but fewer visitors traveled on incentives (-28% to 11,671). Contributing to the growth in convention visitors were three corporate events held at the Hawai'i Convention Center with more than 5,000 delegates combined. Through the first 11 months of 2017, total MCI visitors declined (-1.8% to 454,326) compared to the same period last year.

### Highlights from All Other Markets:

- **Australia:** Visitor arrivals increased in November (+6.5% to 24,553), but were down slightly through the first 11 months of 2017 (-0.9% to 295,475) compared to the same period in 2016.
- **New Zealand:** Visitor arrivals grew in November (+4.7% to 5,094) and year-to-date (+5% to 62,500).
- **China:** Visitor arrivals rose in November (+5.7% to 7,388), but were down through the first 11 months (-8.9% to 141,917) year-over-year.
- **Korea:** Visitor arrivals increased in November (+8.8% to 25,754), but have declined over the first 11 months (-1.8% to 227,970) compared to a year ago.
- **Taiwan:** Visitor arrivals grew in both November (+26.8% to 1,467) and year-to-date (+3.7% to 17,158).
- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland rose slightly in November (+1% to 8,768), but have declined year-to-date (-3.1% to 133,252).
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina decreased in November (-4.1% to 1,299) and year-to-date (-5.6% to 21,647).

### Island Highlights:

- **O'ahu:** Visitor spending increased in November (+4.6% to \$601.2 million) year-over-year. While total visitor days<sup>1</sup> rose 4.3 percent, average daily spending (+0.3% to \$210 per person) was similar to last November. Visitor arrivals were up (+4.9% to 442,560) with more visitors from Canada (+13.9%) and U.S. West (+8.1%), offsetting fewer visitors from Japan (-2.4%). Through the first 11 months of 2017, both visitor spending (+5.3% to \$6.93 billion) and arrivals (+4.1% to 5,154,905) were higher than the same period last year.
- **Maui:** Visitor spending rose in November (+2.7% to \$359.4 million) compared to a year ago boosted by growth in visitor days (+5.8%), which offset lower average daily spending (-2.9% to \$205 per person). Visitor arrivals increased (+9.3% to 215,266) with more visitors from Canada (+16.4%), U.S. East (+10.1%), U.S. West (+7.5%) and Japan (+5.6%). Year-to-date, visitor spending (+4% to \$4.27 billion) and arrivals (+3.7% to 2,483,686) surpassed the totals covering the same timeframe in 2016.
- **Island of Hawai'i:** Visitor spending increased in November (+6.9% to \$188.7 million) year-over-year. Strong growth in visitor days (+14.6%) offset the decrease in average daily spending (-6.7% to \$186 per person) compared to a year ago. Visitor arrivals rose significantly (+19.2% to 135,716), supported by added air service from Japan and the U.S. mainland. Arrivals from the Japan market soared 52.2 percent compared to last November. Direct flights to Kona contributed to a doubling of visitors from Japan staying exclusively on the island of Hawai'i (+110.2% to 5,714) versus last year. Additionally, more visitors came from Canada (+17.8%), U.S. West (+12.9%) and U.S. East (+11.7%) than a year ago. Through the first 11 months of 2017, double-digit growth was realized for both visitor spending (+15.4% to \$2.15 billion) and arrivals (+13.9% to 1,588,725) compared to 2016.
- **Kaua'i:** Visitor spending increased in November (+10.6% to \$127.5 million) year-over-year, bolstered by growth in visitor days (+8.7%) and higher average daily spending (+1.7% to \$177 per person). Visitor arrivals grew (+9.8% to 95,900) with more visitors from Japan (+30.1%), Canada (+18.5%), U.S. East (+12.9%) and U.S. West (+6.4%). Year-to-date, visitor spending (+9.6% to \$1.66 billion) and arrivals (+7.5% to 1,160,128) both increased from a year ago.

### Air Seats to Hawai'i:

- Total air seat capacity to the Hawaiian Islands increased in November (+5% to 964,993 seats), with growth in both scheduled seats (+5% to 957,522) and charter seats (+13.6% to 7,471) compared to November 2016. There were significantly more seats serving Kona (+28.7%) and Līhu'e (+25%), as well as increases for Hilo (+12.3%), Kahului (+3%), and Honolulu (+1.7%).
- The number of scheduled air seats from U.S. West rose in November (+3.9%) versus a year ago. Growth in seats from Los Angeles (+8.3%), Oakland (+4.4%) and San Francisco (+7.7%) offset fewer seats from Las Vegas (-9%).
- There were more scheduled air seats serving U.S. East (+1.1%) in November compared to a year ago. Growth in seats from Chicago (+5.8%), Houston (+5.8%) and Newark (+13.1%) offset fewer seats from Dallas (-3.9%).
- Scheduled air seats from Japan grew in November (+2.1%) year-over-year. The recent launch of nonstop service to Kona from Tokyo's Narita and Haneda airports (+9,500 seats combined), and service from a low-cost carrier serving the Kuala Lumpur-Osaka-Honolulu route (+6,409 seats)

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<sup>1</sup> Aggregate number of days stayed by all visitors.

added nearly 15,000 new seats. This gain was partially offset by a loss of 9,200 seats as one airline temporary halted service on the Haneda-Honolulu route starting October 29.

- Scheduled air seats from Canada rose significantly in November 2017 (+21.4%) boosted by increased service from Vancouver to Honolulu, Kahului, Līhu'e and Kona.
- Scheduled air seats from Oceania grew in November (+6.3%) compared to a year ago, with more seats added from Brisbane (+7.8%), Sydney (+4%) and Auckland (+16%).
- Seats from Other Asia markets rose sharply in November (+20.1%) year-over-year, bolstered by significantly more seats added from Seoul (+36.5%). However, there were fewer seats from Beijing (-6.4%), Shanghai (-13.2%) and Taiwan (-18.4%).
- Through the first 11 months of 2017, statewide air seat capacity increased (+1.4% to 11,093,430 seats) compared to the same period in 2016. Seats increased to Kona (+14.2%), Hilo (+6.9%) and Līhu'e (+6.2%), but remained flat to Kahului (-0.4%) and Honolulu (+0.1%).

### **Cruise Ship Visitors:**

- In November, six out-of-state cruise ships brought 9,784 visitors to the islands compared to the five ships with 9,905 visitors that came in November 2016. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai'i home-ported cruise ship) decreased slightly (-0.8% to 19,038 visitors) in November compared to a year ago.
- Through the first 11 months of 2017, 62 out-of-state cruise ships brought 114,581 visitors to Hawai'i compared to the 53 cruise ships that carried 103,538 visitors over the same period last year. Total cruise visitors (by air and ship) has increased (+12.5% to 231,479) year-to-date in 2017 compared to 2016.

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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.hawaii tourism authority.org/research/research/visitor-highlights/](http://www.hawaii tourism authority.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.hawaii tourism authority.org/research/reports/major-market-areas/](http://www.hawaii tourism authority.org/research/reports/major-market-areas/)

### **About the Hawai'i Tourism Authority**

The [Hawai'i Tourism Authority](http://www.hawaii tourism authority.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.hawaii tourism authority.org](http://www.hawaii tourism authority.org). Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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## NOVEMBER 2017 ARRIVALS AT A GLANCE

CATEGORY AND MMA	2017P	2016	% change	YTD 2017P	YTD 2016	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,288.6</b>	<b>1,232.9</b>	<b>4.5</b>	<b>15,147.0</b>	<b>14,209.0</b>	<b>6.6</b>
Total by air	1,285.5	1,229.3	4.6	15,109.4	14,172.6	6.6
U.S. West	500.9	460.8	8.7	5,566.3	5,070.8	9.8
U.S. East	266.0	252.9	5.2	3,824.9	3,469.5	10.2
Japan	183.3	195.3	-6.2	2,050.6	1,893.9	8.3
Canada	96.4	86.4	11.5	902.1	825.9	9.2
All Others	239.0	233.9	2.2	2,765.5	2,912.6	-5.0
Visitor arrivals by cruise ships	3.1	3.6	-15.1	37.6	36.4	3.3
<b>TOTAL VISITOR DAYS</b>	<b>6,436,360</b>	<b>6,045,646</b>	<b>6.5</b>	<b>75,688,032</b>	<b>72,313,416</b>	<b>4.7</b>
Total by air	6,393,029	5,994,696	6.6	75,164,861	71,808,284	4.7
U.S. West	2,848,391	2,661,946	7.0	31,437,002	30,292,993	3.8
U.S. East	1,268,288	1,234,730	2.7	18,157,251	17,315,871	4.9
Japan	734,067	727,458	0.9	8,560,893	7,966,282	7.5
Canada	619,840	538,112	15.2	5,560,700	5,125,760	8.5
All Others	922,443	832,450	10.8	11,449,015	11,107,378	3.1
Visitor arrivals by cruise ships	43,331	50,951	-15.0	523,171	505,133	3.6
<b>VISITOR ARRIVALS</b>	<b>748,303</b>	<b>697,109</b>	<b>7.3</b>	<b>8,502,545</b>	<b>8,106,066</b>	<b>4.9</b>
Total by air	738,519	687,204	7.5	8,387,964	8,002,529	4.8
U.S. West	322,195	295,213	9.1	3,482,253	3,326,147	4.7
U.S. East	132,683	127,555	4.0	1,806,312	1,707,884	5.8
Japan	130,168	129,851	0.2	1,442,675	1,363,348	5.8
Canada	51,785	43,742	18.4	448,936	406,374	10.5
All Others	101,688	90,842	11.9	1,207,789	1,198,776	0.8
Visitor arrivals by cruise ships	9,784	9,905	-1.2	114,581	103,538	10.7
<b>AVERAGE LENGTH OF STAY</b>	<b>8.60</b>	<b>8.67</b>	<b>-0.8</b>	<b>8.90</b>	<b>8.92</b>	<b>-0.2</b>
Total by air	8.66	8.72	-0.8	8.96	8.97	-0.1
U.S. West	8.84	9.02	-2.0	9.03	9.11	-0.9
U.S. East	9.56	9.68	-1.3	10.05	10.14	-0.9
Japan	5.64	5.60	0.7	5.93	5.84	1.6
Canada	11.97	12.30	-2.7	12.39	12.61	-1.8
All Others	9.07	9.16	-1.0	9.48	9.27	2.3
Visitor arrivals by cruise ships	4.43	5.14	-13.9	4.57	4.88	-6.4
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>200.2</b>	<b>203.9</b>	<b>-1.8</b>	<b>200.1</b>	<b>196.5</b>	<b>1.8</b>
Total by air	201.1	205.1	-1.9	201.0	197.4	1.8
U.S. West	175.8	173.1	1.6	177.1	167.4	5.8
U.S. East	209.7	204.8	2.4	210.7	200.4	5.1
Japan	249.7	268.5	-7.0	239.5	237.7	0.8
Canada	155.5	160.6	-3.2	162.2	161.1	0.7
All Others	259.1	281.0	-7.8	241.6	262.2	-7.9
Visitor arrivals by cruise ships	71.5	71.6	-0.1	71.8	72.0	-0.2
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,722.1</b>	<b>1,768.6</b>	<b>-2.6</b>	<b>1,781.5</b>	<b>1,752.9</b>	<b>1.6</b>
Total by air	1,740.7	1,788.8	-2.7	1,801.3	1,771.0	1.7
U.S. West	1,554.6	1,560.8	-0.4	1,598.5	1,524.5	4.8
U.S. East	2,004.4	1,982.5	1.1	2,117.5	2,031.5	4.2
Japan	1,408.0	1,504.1	-6.4	1,421.4	1,389.1	2.3
Canada	1,861.2	1,975.5	-5.8	2,009.5	2,032.4	-1.1
All Others	2,350.6	2,574.7	-8.7	2,289.7	2,429.6	-5.8
Visitor arrivals by cruise ships	316.5	368.1	-14.0	327.8	351.1	-6.6

P=Preliminary data.

Source:Haw a'i Tourism Authority

## NOVEMBER 2017 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2017P	2016	% change	YTD 2017P	YTD 2016	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,288.6</b>	<b>1,232.9</b>	<b>4.5</b>	<b>15,147.0</b>	<b>14,209.0</b>	<b>6.6</b>
Total by air	1,285.5	1,229.3	4.6	15,109.4	14,172.6	6.6
O'ahu	601.2	575.0	4.6	6,927.6	6,578.3	5.3
Maui	359.4	349.8	2.7	4,273.8	4,107.7	4.0
Moloka'i	2.5	3.1	-20.8	28.6	29.2	-2.1
Lāna'i	6.3	9.6	-34.5	70.0	79.9	-12.4
Kaua'i	127.5	115.3	10.6	1,662.7	1,517.2	9.6
Haw aii Island	188.7	176.5	6.9	2,146.7	1,860.4	15.4
Visitor arrivals by cruise ships	3.1	3.6	-15.1	37.6	36.4	3.3
<b>TOTAL VISITOR DAYS</b>	<b>6,436,360</b>	<b>6,045,646</b>	<b>6.5</b>	<b>75,688,032</b>	<b>72,313,416</b>	<b>4.7</b>
Total by air	6,393,029	5,994,696	6.6	75,164,861	71,808,284	4.7
O'ahu	2,869,840	2,752,627	4.3	34,679,148	33,416,790	3.8
Maui	1,751,263	1,655,516	5.8	19,822,048	19,345,932	2.5
Moloka'i	23,896	23,967	-0.3	245,906	254,837	-3.5
Lāna'i	16,984	18,473	-8.1	188,250	196,034	-4.0
Kaua'i	719,056	661,371	8.7	8,672,632	8,223,387	5.5
Haw aii Island	1,011,990	882,742	14.6	11,556,877	10,371,304	11.4
Visitor arrivals by cruise ships	43,331	50,951	-15.0	523,171	505,133	3.6
<b>VISITOR ARRIVALS</b>	<b>748,303</b>	<b>697,109</b>	<b>7.3</b>	<b>8,502,545</b>	<b>8,106,066</b>	<b>4.9</b>
Total by air	738,519	687,204	7.5	8,387,964	8,002,529	4.8
O'ahu	442,560	422,040	4.9	5,154,905	4,949,894	4.1
Maui	215,266	196,946	9.3	2,483,686	2,394,863	3.7
Moloka'i	4,679	4,032	16.0	51,769	53,184	-2.7
Lāna'i	4,675	5,232	-10.6	57,528	57,066	0.8
Kaua'i	95,900	87,342	9.8	1,160,128	1,079,202	7.5
Haw aii Island	135,716	113,824	19.2	1,588,725	1,394,983	13.9
Visitor arrivals by cruise ships	9,784	9,905	-1.2	114,581	103,538	10.7
<b>AVERAGE LENGTH OF STAY</b>	<b>8.60</b>	<b>8.67</b>	<b>-0.8</b>	<b>8.90</b>	<b>8.92</b>	<b>-0.2</b>
Total by air	8.66	8.72	-0.8	8.96	8.97	-0.1
O'ahu	6.48	6.52	-0.6	6.73	6.75	-0.3
Maui	8.14	8.41	-3.2	7.98	8.08	-1.2
Moloka'i	5.11	5.94	-14.1	4.75	4.79	-0.9
Lāna'i	3.63	3.53	2.9	3.27	3.44	-4.7
Kaua'i	7.50	7.57	-1.0	7.48	7.62	-1.9
Haw aii Island	7.46	7.76	-3.9	7.27	7.43	-2.2
Visitor arrivals by cruise ships	4.43	5.14	-13.9	4.57	4.88	-6.4
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>200.2</b>	<b>203.9</b>	<b>-1.8</b>	<b>200.1</b>	<b>196.5</b>	<b>1.8</b>
Total by air	201.1	205.1	-1.9	201.0	197.4	1.8
O'ahu	209.5	208.9	0.3	199.8	196.9	1.5
Maui	205.2	211.3	-2.9	215.6	212.3	1.5
Moloka'i	103.8	130.6	-20.6	116.4	114.7	1.5
Lāna'i	370.8	520.8	-28.8	371.8	407.7	-8.8
Kaua'i	177.3	174.3	1.7	191.7	184.5	3.9
Haw aii Island	186.4	199.9	-6.7	185.7	179.4	3.6
Visitor arrivals by cruise ships	71.5	71.6	-0.1	71.8	72.0	-0.2
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,722.1</b>	<b>1,768.6</b>	<b>-2.6</b>	<b>1,781.5</b>	<b>1,752.9</b>	<b>1.6</b>
Total by air	1740.7	1788.8	-2.7	1801.3	1771.0	1.7
O'ahu	1358.5	1362.4	-0.3	1343.9	1329.0	1.1
Maui	1669.4	1775.9	-6.0	1720.8	1715.2	0.3
Moloka'i	530.0	776.3	-31.7	553.0	549.7	0.6
Lāna'i	1346.9	1838.9	-26.8	1216.6	1400.5	-13.1
Kaua'i	1329.4	1320.0	0.7	1433.2	1405.8	1.9
Haw aii Island	1390.2	1550.5	-10.3	1351.2	1333.6	1.3
Visitor arrivals by cruise ships	316.5	368.1	-14.0	327.8	351.1	-6.6

P=Preliminary data.

Source:Haw aii Tourism Authority