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HTA Release (17-30)

Hawai'i Visitor Spending Increased 9.8 Percent in July 2017

HONOLULU – Visitors to the Hawaiian Islands spent a total of \$1.59 billion in July 2017, an increase of 9.8 percent compared to a year ago, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA). Total visitor arrivals rose 6.8 percent to 891,878 visitors, bolstered by growth in arrivals from air (+6.4% to 888,236) and cruise ships (+282.5% to 3,641).

Of Hawai'i's major markets, the U.S. East reported the largest gain in visitor spending in July 2017 (+21.7% to \$452.5 million) compared to a year ago. Visitor arrivals were up significantly (+11% to 208,530), supported by increased air seat capacity from Dallas and Minneapolis. Average daily visitor spending was also higher (+10.2% to \$215 per person).

Spending by visitors from U.S. West rose in July 2017 (+9.5% to \$598.8 million) versus last year, boosted by an increase in arrivals (+5.4% to 385,235 visitors) and higher daily spending (+3.7% to \$168 per person).

The Japan market continued to report year-over-year growth in visitor spending and arrivals in July 2017 due to increased air service to Kona and Honolulu. Visitor spending grew (+5.5% to \$192.5 million), fueled by increased arrivals (+7% to 136,300), which offset slightly lower daily spending (-1.6% to \$232 per person).

For the Canada market, visitor spending decreased in July 2017 (-8.9% to \$46.6 million) compared to last year. Visitor arrivals rose (+3.4% to 26,691) but daily spending declined (-10.6% to \$148 per person) from a year ago.

Visitor spending from All Other International markets increased in July 2017 (+1.1% to \$295.2 million), as growth in arrivals (+2.8% to 131,482) offset lower daily spending.

The island of Hawai'i reported a sharp increase in visitor spending in July 2017 (+23.2% to \$216.7) compared to a year ago. Visitor spending also grew on O'ahu (+10.3% to \$764.4 million) and Maui (+8.4% to \$432.5 million), but decreased slightly on Kaua'i (-0.7% to \$165.5 million).

Total air seats serving Hawai'i increased in July 2017 (+3.1% to 1,139,710) compared to last year. Double-digit growth in scheduled seats from U.S. East (+21.8%) and Japan (+18.3%) offset declines from Oceania (-5.1%) and U.S. West (-1.2%).

Year-to-Date 2017

Visitor spending statewide increased through the first seven months of 2017 (+8.9% to \$9.95 billion), bolstered by growth in arrivals (+4.7% to 5,496,854) and daily spending (+4% to \$200 per person).

Year-to-date, Hawai'i's four largest visitor markets, U.S. West (+11.2% to \$3.66 billion), U.S. East (+13% to \$2.66 billion), Japan (+12.3% to \$1.25 billion) and Canada (+8.7% to \$655.2 million), have all reported strong growth in visitor spending compared to the same period a year ago.

Visitor spending from All Other International markets declined year-to-date (-3% to \$1.69 billion), due to decreased arrivals (-3.1% to 739,715) and lower daily spending (-3.5% to \$241 per person) compared to the first seven months of 2016.

Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Pacific (+4.7%) and Mountain (+7.1%) regions in July 2017 year-over-year, boosted by more visitors from Colorado (+13%), Oregon (+15.9%), Washington (+11.8%) and California (+3.1%). Through the first seven months of 2017, arrivals increased from both the Pacific (+2.8%) and Mountain (+6.3%) regions.
- **U.S. East:** Visitor arrivals from all regions were up in July 2017, led by growth from the South Atlantic (+12.3%), East North Central (+11.7%) and West South Central (+9.1%) regions. Year-to-date, arrivals increased from all regions compared to the first seven months of 2016.
- **Japan:** Significantly more visitors from Japan stayed in condominium (+25.7%) and timeshare (+24.7%) properties in July 2017 versus a year ago. This was the third straight month that timeshare and condominium usage has grown by double digits.
- **Canada:** There was moderate growth in hotel stays (+2.6%) by visitors from Canada in July 2017, while usage of rental homes (+28.6%) and timeshares (+24.9%) rose sharply compared to July 2016.
- **MCI:** Total MCI visitors increased considerably in July 2017 (+29.3% to 41,112) year-over-year. Significantly more visitors came to attend conventions (+91.7%) and corporate meetings (+21.2%), while fewer visitors traveled on incentive trips (-26.3%). Two events held at the Hawai'i Convention Center contributed to this increase. The 2017 Institute of Electrical and Electronics Engineers Computer Vision and Pattern Recognition was attended by nearly 4,000 delegates, while a private corporate event drew more than 3,000 delegates. Year-to-date through July 2017, the number of MCI visitors rose (+5.4% to 328,089) compared to the same period a year ago.

Highlights from All Other Markets:

- **Australia:** Fewer available air seats contributed to a decrease in visitor arrivals in both July 2017 (-5.8% to 28,456) and in the first seven months of 2017 (-3.5% to 178,425).
- **New Zealand:** Visitor arrivals increased for both July 2017 (+14% to 8,801) and year-to-date (+8.1% to 35,885) compared to a year ago.
- **China:** Arrivals declined for both July 2017 (-11.5% to 13,489) and year-to-date (-10.5% to 96,379) versus the same periods in 2016.
- **Korea:** Visitor arrivals increased in July 2017 (+11.8% to 21,415), but are slightly behind the pace year-to-date (-1.1% to 134,715) of 2016.
- **Taiwan:** Visitor arrivals decreased in July 2017 (-2.8% to 1,876). Arrivals year-to-date were comparable (+0.1% to 11,175) to a year ago.
- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland increased in July 2017 (+3.1% to 16,428) versus last year. Through the first seven months, arrivals have declined (-2.4% to 73,469) compared to last year.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina rose slightly in July 2017 (+0.9% to 3,090), but declined through the first seven months of the year (-7.8% to 14,609).

Island Highlights:

- **O‘ahu:** Visitor spending increased in July 2017 (+10.3% to \$764.4 million) boosted by growth in visitor days¹ (+5.8%) and higher daily spending (+4.2% to \$201 per person) compared to last July. Arrivals rose (+7.5% to 554,972), with more visitors from U.S. East (+12.4%), U.S. West (+7.7%), Japan (+4.9%) and Canada (+4.2%). Year-to-date, both visitor spending (+7% to \$4.45 billion) and arrivals (+4% to 3,297,624) have increased in 2017 compared to a year ago.
- **Maui:** Visitor spending grew in July 2017 (+8.4% to \$432.5 million) year-over-year due to increases in visitor days (+1.6%) and daily spending (+6.7% to \$212 per person). Visitor arrivals were up (+2.6% to 261,964) with growth from Japan (+24.7%), U.S. East (+8.7%) and U.S. West (+3%) offsetting fewer arrivals from Canada (-9.3%). Through the first seven months of 2017, both visitor spending (+5.3% to \$2.84 billion) and arrivals (+3.3% to 1,622,565) have exceeded the results for the same period last year.
- **Island of Hawai‘i:** Visitor spending rose substantially in July 2017 (+23.2% to \$216.7 million), boosted by strong growth in total visitor days (+18.3%), and higher daily spending (+4.1% to \$174 per person) compared to a year ago. Visitor arrivals were up significantly (+18.9% to 176,230), supported by increased air service from the U.S. mainland and Japan. Arrivals increased from Japan (+42.2%), U.S. East (+17.9%), Canada (+12.5%) and U.S. West (+11.3%). Year-to-date, double-digit growth has been recorded for both visitor spending (+19.5% to \$1.44 billion) and arrivals (+14% to 1,044,376) compared to the first seven months of 2016.
- **Kaua‘i:** Visitor spending dropped slightly in July 2017 (-0.7% to \$165.5 million) due to lower daily spending (-6.6% to \$172 per person). Visitor days (+6.3%) and arrivals increased (+6.7% to 128,259) compared to July 2016. There were more visitors from U.S. East (+6.4%), U.S. West (+5.1%) and Canada (+3.7%) but fewer visitors from Japan (-1.3%) versus a year ago. Through the first seven months of 2017, visitor spending rose significantly (+13.7% to \$1.11 billion) compared to the same period last year.

Air Seats to Hawai‘i:

- Total air seats to Hawai‘i increased in July 2017 (+3.1% to 1,139,710), with growth in scheduled seats (+3.2% to 1,133,419) but fewer charter seats (-10.9% to 6,291) compared to a year ago.
- Seat capacity to Kona rose considerably in July 2017 (+14.1%) year-over-year, boosted by the non-stop service from Tokyo’s Haneda Airport launched in December 2016 and increased service from Denver and Dallas to Kona in June 2017. Seats to Līhu‘e (+7%) and Honolulu (+3%) increased in July 2017, but there were fewer seats to Hilo (-7.3%) and Kahului (-1.7%) versus last year.
- The number of scheduled seats from U.S. West dropped slightly in July 2017 (-1.2%) compared to last year. Growth in seats from Denver (+35%) and San Francisco (+2%) was offset by fewer seats from Los Angeles (-1.3%), San Diego (-9.7%), Oakland (-11.4%), Las Vegas (-5.1%) and Phoenix (-5.8%).
- Scheduled seats serving the U.S. East market rose significantly in July 2017 (+21.8%) year-over-year. The seasonal Minneapolis-Honolulu route produced an additional 7,618 seats in July 2017 and will add nearly 35,000 seats from April 2017 to late August 2017. Air service from Dallas to Hawai‘i grew considerably in July 2017, with new flights serving Kona introducing 6,479 seats to the route, along with expanded service to Kahului (+2,160 seats) and Honolulu (+2,160 seats).

¹ Aggregate number of days stayed by all visitors.

- Scheduled seats from Japan increased substantially in July 2017 (+18.3%) compared to last year. There were seats added to the Narita-Honolulu route (+20,424 seats) and Haneda-Kona route (+3,614 seats). Furthermore, in late June 2017, a low-cost carrier launched service from Kuala Lumpur, Malaysia to Honolulu with a stop in Osaka (+6,700 seats).
- Scheduled seats from Canada (19,158) in July 2017 were unchanged from a year ago.
- Scheduled seats from Oceania declined in July 2017 (-5.1%). Increased service from Melbourne (+12.5%) and Sydney (+7.1%) were offset by fewer seats from Brisbane (-58.2%). Seats from Auckland grew (+6.4%) compared to last July.
- The number of scheduled seats from Other Asia in July 2017 was similar (-0.1%) to a year ago. Seats from Seoul increased (+5.5%). There were fewer seats from Beijing (-9.9%) and Shanghai (-13.2%). Seats from Taiwan were unchanged from July 2016.
- Through the first seven months of 2017, statewide air capacity of 7,144,043 seats was comparable to the year prior. There was growth in seats to Kona (+11.1%), Hilo (+3.3%) and Līhu'e (+0.8%), but fewer seats to Kahului (-1.1%) and Honolulu (-1%).

Cruise Ship Visitors:

- June through August is a typically slower period for out-of-state cruise ships coming to Hawai'i. In July 2017, two out-of-state cruise ships brought 3,641 visitors to the islands compared to one ship with 952 visitors that came in July 2016. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai'i home-ported cruise ship) increased in July 2017 (+23.9% to 16,542 visitors).
- Through the first seven months of 2017, 42 out-of-state cruise ships brought 73,724 visitors to Hawai'i compared to 30 cruise ships that carried 57,507 visitors over the same period last year. Total cruise visitors (by air and ship) increased year-to-date in 2017 (+23.1% to 148,249).

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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/

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/

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. Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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July 2017 Arrivals at a Glance

CATEGORY AND MMA	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
TOTAL EXPENDITURES (\$mil.)	1,586.4	1,444.6	9.8	9,946.8	9,134.4	8.9
Total by air	1,585.5	1,444.2	9.8	9,924.6	9,112.5	8.9
U.S. West	598.8	546.7	9.5	3,660.2	3,292.3	11.2
U.S. East	452.5	371.9	21.7	2,664.0	2,358.3	13.0
Japan	192.5	182.5	5.5	1,253.4	1,116.1	12.3
Canada	46.6	51.1	-8.9	655.2	602.6	8.7
All Others	295.2	292.0	1.1	1,691.7	1,743.2	-3.0
Visitor arrivals by cruise ships	0.9	0.3	175.7	22.3	21.9	1.8
TOTAL VISITOR DAYS	8,094,248	7,594,406	6.6	49,870,692	47,651,339	4.7
Total by air	8,083,202	7,591,204	6.5	49,543,707	47,387,229	4.6
U.S. West	3,555,789	3,366,641	5.6	20,558,403	19,883,545	3.4
U.S. East	2,104,961	1,906,778	10.4	12,787,746	11,948,300	7.0
Japan	829,906	774,396	7.2	5,170,732	4,744,139	9.0
Canada	314,754	308,957	1.9	4,011,432	3,834,514	4.6
All Others	1,277,792	1,234,431	3.5	7,015,394	6,976,732	0.6
Visitor arrivals by cruise ships	11,045	3,202	245.0	326,984	264,110	23.8
VISITOR ARRIVALS	891,878	835,417	6.8	5,496,854	5,251,218	4.7
Total by air	888,236	834,465	6.4	5,423,129	5,193,710	4.4
U.S. West	385,235	365,497	5.4	2,241,484	2,161,586	3.7
U.S. East	208,530	187,838	11.0	1,252,499	1,155,752	8.4
Japan	136,300	127,373	7.0	873,928	817,095	7.0
Canada	26,691	25,822	3.4	315,502	295,690	6.7
All Others	131,482	127,935	2.8	739,715	763,588	-3.1
Visitor arrivals by cruise ships	3,641	952	282.5	73,724	57,507	28.2
AVERAGE LENGTH OF STAY	9.08	9.09	-0.2	9.07	9.07	0.0
Total by air	9.10	9.10	0.0	9.14	9.12	0.1
U.S. West	9.23	9.21	0.2	9.17	9.20	-0.3
U.S. East	10.09	10.15	-0.6	10.21	10.34	-1.2
Japan	6.09	6.08	0.1	5.92	5.81	1.9
Canada	11.79	11.96	-1.4	12.71	12.97	-2.0
All Others	9.72	9.65	0.7	9.48	9.14	3.8
Visitor arrivals by cruise ships	3.03	3.36	-9.8	4.44	4.59	-3.4
PER PERSON PER DAY SPENDING (\$)	196.0	190.2	3.0	199.5	191.7	4.0
Total by air	196.1	190.3	3.1	200.3	192.3	4.2
U.S. West	168.4	162.4	3.7	178.0	165.6	7.5
U.S. East	215.0	195.0	10.2	208.3	197.4	5.5
Japan	231.9	235.7	-1.6	242.4	235.3	3.0
Canada	147.9	165.4	-10.6	163.3	157.1	3.9
All Others	231.1	236.6	-2.3	241.1	249.9	-3.5
Visitor arrivals by cruise ships	80.2	100.4	-20.1	68.1	82.7	-17.7
PER PERSON PER TRIP SPENDING (\$)	1,778.7	1,729.2	2.9	1,809.5	1,739.5	4.0
Total by air	1,785.0	1,730.7	3.1	1,830.0	1,754.5	4.3
U.S. West	1,554.3	1,495.8	3.9	1,632.9	1,523.1	7.2
U.S. East	2,169.8	1,979.9	9.6	2,127.0	2,040.5	4.2
Japan	1,412.1	1,433.0	-1.5	1,434.3	1,366.0	5.0
Canada	1,744.3	1,978.9	-11.9	2,076.8	2,037.9	1.9
All Others	2,245.5	2,282.6	-1.6	2,286.9	2,283.0	0.2
Visitor arrivals by cruise ships	243.4	337.7	-27.9	301.9	380.0	-20.6

P=Preliminary data.

Source:Haw aii Tourism Authority

July 2017 Island Highlights

CATEGORY AND ISLAND	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
TOTAL EXPENDITURES (\$mil.)	1,586.4	1,444.6	9.8	9,946.8	9,134.4	8.9
Total by air	1,585.5	1,444.2	9.8	9,924.6	9,112.5	8.9
O'ahu	764.4	692.9	10.3	4,452.1	4,160.0	7.0
Maui	432.5	398.9	8.4	2,845.6	2,701.5	5.3
Moloka'i	1.4	1.6	-13.6	21.1	17.5	20.1
Lāna'i	5.1	8.3	-38.2	47.9	44.8	6.8
Kaua'i	165.5	166.7	-0.7	1,119.6	984.7	13.7
Haw aii Island	216.7	175.8	23.2	1,438.3	1,203.9	19.5
Visitor arrivals by cruise ships	0.9	0.3	175.7	22.3	21.9	1.8
TOTAL VISITOR DAYS	8,094,248	7,594,406	6.6	49,870,692	47,651,339	4.7
Total by air	8,083,202	7,591,204	6.5	49,543,707	47,387,229	4.6
O'ahu	3,795,351	3,585,738	5.8	22,562,129	21,775,928	3.6
Maui	2,042,532	2,010,376	1.6	13,188,588	12,900,955	2.2
Moloka'i	17,560	18,835	-6.8	166,561	169,315	-1.6
Lāna'i	18,954	17,491	8.4	126,756	123,771	2.4
Kaua'i	964,510	907,007	6.3	5,761,550	5,483,395	5.1
Haw aii Island	1,244,296	1,051,757	18.3	7,738,123	6,933,867	11.6
Visitor arrivals by cruise ships	11,045	3,202	245.0	326,984	264,110	23.8
VISITOR ARRIVALS	891,878	835,417	6.8	5,496,854	5,251,218	4.7
Total by air	888,236	834,465	6.4	5,423,129	5,193,710	4.4
O'ahu	554,972	516,388	7.5	3,297,624	3,171,200	4.0
Maui	261,964	255,259	2.6	1,622,565	1,570,978	3.3
Moloka'i	4,268	4,854	-12.1	33,018	36,074	-8.5
Lāna'i	5,249	5,062	3.7	37,309	36,140	3.2
Kaua'i	128,259	120,166	6.7	754,668	702,821	7.4
Haw aii Island	176,230	148,265	18.9	1,044,376	916,408	14.0
Visitor arrivals by cruise ships	3,641	952	282.5	73,724	57,507	28.2
AVERAGE LENGTH OF STAY	9.08	9.09	-0.2	9.07	9.07	0.0
Total by air	9.10	9.10	0.0	9.14	9.12	0.1
O'ahu	6.84	6.94	-1.5	6.84	6.87	-0.4
Maui	7.80	7.88	-1.0	8.13	8.21	-1.0
Moloka'i	4.11	3.88	6.0	5.04	4.69	7.5
Lāna'i	3.61	3.46	4.5	3.40	3.42	-0.8
Kaua'i	7.52	7.55	-0.4	7.63	7.80	-2.1
Haw aii Island	7.06	7.09	-0.5	7.41	7.57	-2.1
Visitor arrivals by cruise ships	3.03	3.36	-9.8	4.44	4.59	-3.4
PER PERSON PER DAY SPENDING (\$)	196.0	190.2	3.0	199.5	191.7	4.0
Total by air	196.1	190.3	3.1	200.3	192.3	4.2
O'ahu	201.4	193.2	4.2	197.3	191.0	3.3
Maui	211.7	198.4	6.7	215.8	209.4	3.0
Moloka'i	79.8	86.1	-7.3	126.4	103.6	22.0
Lāna'i	270.1	473.6	-43.0	377.9	362.3	4.3
Kaua'i	171.6	183.8	-6.6	194.3	179.6	8.2
Haw aii Island	174.1	167.2	4.1	185.9	173.6	7.1
Visitor arrivals by cruise ships	80.2	100.4	-20.1	68.1	82.7	-17.7
PER PERSON PER TRIP SPENDING (\$)	1,778.7	1,729.2	2.9	1,809.5	1,739.5	4.0
Total by air	1785.0	1730.7	3.1	1830.0	1754.5	4.3
O'ahu	1377.3	1341.9	2.6	1350.1	1311.8	2.9
Maui	1650.8	1562.5	5.6	1753.7	1719.7	2.0
Moloka'i	328.5	334.2	-1.7	637.6	486.1	31.2
Lāna'i	975.4	1636.6	-40.4	1283.8	1240.8	3.5
Kaua'i	1290.2	1387.2	-7.0	1483.6	1401.1	5.9
Haw aii Island	1229.4	1186.0	3.7	1377.2	1313.7	4.8
Visitor arrivals by cruise ships	243.4	337.7	-27.9	301.9	380.0	-20.6

P= Preliminary data.

Source: Haw aii Tourism Authority