HAWAI'I TOURISM AUTHORITY

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Hawai'i Visitor Spending Generated $1.52 Billion in February 2018

HONOLULU – Visitors to the Hawaiian Islands spent a total of $1.52 billion in February 2018, a gain of 12.7 percent compared to a year ago, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA).

Total arrivals to Hawai'i increased 10.3 percent to 778,571 visitors in February, supported by growth in arrivals by air service (+10.3% to 764,043) and by cruise ships (+8.4% to 14,528). Total visitor days[1] grew 8.5 percent in February versus a year ago. The average daily census[2], or number of visitors on any given day in February, was 252,965, up 8.5 percent compared to February of last year.

Spending by visitors from the U.S. West market increased (+5.2% to $494.4 million) in February. Total visitor arrivals also rose (+12.5% to 294,082), supported by expanded air service to the neighbor islands. However, the average daily spending by each visitor (-3.9% to $187 per person) was lower in February compared to a year ago.

The U.S. East market reported a sizeable increase in visitor spending (+14.4% to $409.8 million) in February, boosted by growth in visitor arrivals (+10.3% to 176,435) and higher average daily spending (+5.6% to $226 per person).

Visitor spending from the Japan market rose significantly (+15.6% to $202.9 million) in February versus last year. While the growth in visitor arrivals was marginal (+0.9% to 124,648), visitors stayed longer (+3.3% to 5.96 days) and spent more per day (+10.9% to $273 per person) compared to a year ago.

The Canada market saw growth in visitor spending (+9.7% to $148.9 million) in February versus last year, supported by increases in arrivals (+4.9% to 63,863) and average daily spending (+8.5% to $182 per person).

In February, combined visitor spending from All Other International Markets increased sharply (+26.8% to $264 million), boosted by growth in arrivals (+20.9% to 105,016) and higher average daily spending (+7.8% to $262 per person).

All four larger Hawaiian Islands recorded increases in both visitor spending and arrivals in February compared to last year.

A total of 1,005,821 trans-Pacific air seats serviced the Hawaiian Islands in February, up 10.3 percent from a year ago. Growth in air seats from Other Asia (+32.5%), U.S. West (+13.8%), U.S. East (+11%), Canada (+3%) and Oceania (+1.9%) offset a decline in seats from Japan (-3.3%).

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[1] Aggregate number of days stayed by all visitors.

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

Year-to-Date 2018

Through the first two months of 2018, visitor spending (+8.5% to $3.21 billion) exceeded the results from the same period last year, bolstered by growth in visitor arrivals (+7.7% to 1,575,054) and average daily spending (+2.2% to $212 per person).

Visitor spending increased from U.S. West (+6.9% to $1.08 billion), U.S. East (+8.8% to $860.5 million), Japan (+5% to $394.8 million), Canada (+7.8% to $320 million) and All Other International markets (+15.1% to $545 million).

Visitor arrivals increased from U.S. West (+13.3% to 598,173), U.S. East (+6.6% to 354,397), Canada (+5.7% to 133,026) and All Other International markets (+10.9% to 219,269) but declined from Japan (-1.4% to 243,415).

Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Pacific (+13.3%) and Mountain (+15.3%) regions in February compared to a year ago, with growth reported from Utah (+21.2%), California (+14.2%), Colorado (+14.1%), Oregon (+12.5%), Washington (+10.2%) and Arizona (+8.5%). Through the first two months, arrivals from the Mountain (+14%) and Pacific (+13.3%) regions rose versus the same period last year.

- **U.S. East:** Visitor arrivals increased from every region in February. Through the first two months, arrivals were up from all regions led by growth from the two largest regions, East North Central (+7.8%) and the South Atlantic (+8.3%).

- **Japan:** Fewer visitors stayed in hotels (-1.7%) in February while stays in timeshares (+29.2%) and condominiums (+18.3%) increased compared to a year ago. Usage of rental homes continued to be a small segment, but this number has tripled (884 from 292 visitors) compared to a year ago. More visitors made their own travel arrangements (+19%), while fewer visitors purchased group tours (-18%) and package trips (-5.6%).

- **Canada:** More visitors stayed in hotels (+16.9%) in February versus last year. Stays in bed-and-breakfasts (+17.3%) and rental homes (+4.5%) also increased from a year ago.

- **MCI:** A total of 51,646 visitors came for meetings, conventions and incentives (MCI) in February, an increase of 7.6 percent from last year. More visitors came to attend conventions (+14.9%) and traveled on incentive trips (+7.4%) but fewer came to attend corporate meetings (-4.7%). Through the first two months, total MCI visitors declined (-3% to 105,265) compared to the same period last year.

Highlights from All Other Markets:

- **Australia:** Visitor arrivals increased in both February (+5.1% to 17,401) and through the first two months (+3.2% 45,805).

- **New Zealand:** Visitor arrivals grew in both February (+29% to 2,672) and through the first two months (+22.6% to 7,379).

- **China:** Visitor arrivals rose in February (+15% to 14,568) but decreased through the first two months (-4.6% to 26,130) year-over-year.

- **Korea:** Visitor arrivals grew in both February (+23.1% to 28,696) and through the first two months (+23% to 58,609).

- **Taiwan:** Visitor arrivals declined in both February (-6.2% to 1,577) and through the first two months (-11.4% to 3,263).

- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland rose in both February (+13.7% to 9,028) and through the first two months (+5.6% to 16,648).

- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina increased in both February (+42.3% to 2,348) and through the first two months (+28% to 5,558).

Island Highlights:

- **O‘ahu:** Visitor spending rose significantly in February (+19.6% to $673.9 million), boosted by growth in visitor days (+7.9%) and higher average daily spending (+10.9% to $217 per person). Arrivals increased (+8.9% to 456,916) with more visitors from U.S. West (+13.8%), Canada (+8.2%) and U.S. East (+7.5%) offsetting fewer visitors from Japan (-1.7%). The average daily census rose 7.9 percent to 111,095 visitors in February.

  Through the first two months, both visitor spending (+7.9% to $1.34 billion) and arrivals (+5.9% to 917,434) were higher than the same period last year.

- **Maui:** Visitor spending grew in February (+6.1% to $429.8 million) fueled by an increase in visitor days (+6.3%), as average daily spending (-0.2% to $232 per person) was similar to a year ago. Arrivals were up (+7.4%), with growth in visitors from U.S. West (+9.9%), U.S. East (+9.9%) and Canada (+6.2%) offsetting fewer visitors from Japan (-31%). The average daily census increased 6.3 percent to 66,224 visitors in February.

  Through the first two months, visitor spending (+12.4% to $978.3 million) and arrivals (+6.4% to 448,135) surpassed the totals covering the same period from a year ago.

- **Island of Hawai‘i:** Visitor spending rose considerably in February (+14.8% to $245.3 million), bolstered by increases in visitor days (+13.8%) and average daily spending (+0.9% to $203 per person) compared to a year ago. Arrivals increased (+18.4% to 161,468), with more visitors from Japan (+49.7%), U.S. East (+13.7%), U.S. West (+8.9%) and Canada (+3.9%). The average daily census grew 13.8 percent to 43,195 visitors in February.

  Through the first two months, growth was realized in both visitor spending (+7.7% to $513.4 million) and arrivals (+11.2% to 319,825) compared to a year ago.

- **Kaua‘i:** Visitor spending increased slightly in February (+0.7% to $158 million). Although visitor days (+9.3%) increased, the average daily spending was lower (-7.8% to $196 per person) year-over-year. Visitor arrivals grew (+10.1% to 103,956), with more visitors from Japan (+34.1%), U.S. West (+12.4%) and U.S. East (+11.3%) offsetting fewer visitors from Canada (-5.8%). The average daily census rose 9.3 percent to 28,842 visitors in February.

  Through the first two months, both visitor spending (+1.6% to $349.1 million) and arrivals (+10.1% to 213,239) increased versus the same period last year.

Air Seats to Hawai‘i:

In February, total air seat capacity increased 10.3 percent to 1,005,821 seats with growth in scheduled air seats (+10.4% to 1,000,240) offsetting fewer charter seats (-6% to 5,581) compared to last year. More seats served Hilo (+70.5%), Līhu‘e (+50.4%), Kona (+29.5%), Kahului (+9.6%) and Honolulu (+4.3%).

- Scheduled air seats from the U.S. West market rose (+13.8%) in February, boosted by growth in seats from Denver (+44.3%), Los Angeles (+17.2%), Portland (+21.5%), Salt Lake City (+49.6%), San Francisco (+23%), San Jose (+22.2%), Phoenix (+7.7%) and Seattle (+5%).

- Scheduled air seats from the U.S. East market increased 11 percent in February compared to a year ago. Growth in seats from Chicago (+58.7%), Dallas (+19.9%), Newark (+17.3%) and Houston (+5.8%) offset fewer seats from New York (-34.1%) and Washington D.C. (-11.6%).

- Scheduled air seats from Japan declined in February 2018 (-3.3%). Air seat capacity to Kona nearly tripled (+152.5% to 8,908 seats), with the launch of nonstop service from Narita in September 2017. A low-cost carrier serving the Kuala Lumpur-Osaka-Honolulu route (+6,032 seats) and a low-cost carrier serving the Singapore-Osaka-Honolulu route (+5,264 seats) combined added more than 11,000 new seats in February year-over-year. However, these increases were offset by a loss of 8,600 seats due to an international carrier discontinuing service on the Haneda-Honolulu route after the first week of January, and a second international carrier reducing service on the Osaka-Honolulu route (-3,400 seats). A U.S. carrier also decreased service on its Narita-Honolulu route (-3,300 seats) and reconfigured its aircraft with fewer seats on the Osaka-Honolulu route (-1,800 seats).

- Scheduled air seats from Canada increased 3 percent compared to February 2017, with more seats from Vancouver.

- Scheduled air seats from Oceania rose in February 2018 (+1.9%) mainly due to more seats being added from Auckland, New Zealand (+10.7%). There was no growth in total seats from Brisbane, Melbourne and Sydney, Australia (-0.5%) compared to a year ago.

- Scheduled air seats from Other Asia markets rose in February (+32.5%) year-over-year, bolstered by more seats from Seoul (+34.2%). Total seats from Beijing and Shanghai rose (+32.5%) due to added service for the Lunar New Year, and there were also more seats from Taiwan (+10.9%).

- Through the first two months, air seat capacity statewide increased (+9.9% to 2,128,953 seats) compared to the same period last year. Seats increased to Hilo (+66.8%), Līhu‘e (+46.2%), Kona (+31.6%), Kahului (+8.4%) and Honolulu (+4.3%).

Cruise Ship Visitors:

- In February, eight out-of-state cruise ships brought 14,528 visitors to Hawai‘i compared to seven ships that carried 13,404 visitors a year ago. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai‘i home-ported cruise ship) increased (+4.7% to 23,640) versus last year.

- In the first two months, 17 out-of-state cruise ships brought 26,774 visitors to Hawai‘i compared to the 19 cruise ships that carried 30,834 visitors over the same period last year. Total cruise visitors (by air and ship) declined (-8.4% to 45,049) versus a year ago.

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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.hawaiitourismauthority.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.hawaiitourismauthority.org/research/reports/major-market-areas/

About the Hawai‘i Tourism Authority
The Hawai‘i Tourism Authority 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.hawaiitourismauthority.org. Follow updates about HTA on Facebook, Twitter (@HawaiiHTA) and its YouTube Channel.

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FEBRUARY 2018 ARRIVALS AT A GLANCE

CATEGORY AND MMA	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES ($mil.)	1,523.8	1,351.6	12.7	3,211.6	2,961.1	8.5
Total by air	1,520.2	1,347.6	12.8	3,204.1	2,951.4	8.6
U.S. West	494.4	470.0	5.2	1,083.9	1,014.0	6.9
U.S. East	409.8	358.1	14.4	860.5	791.2	8.8
Japan	202.9	175.5	15.6	394.8	375.9	5.0
Canada	148.9	135.7	9.7	320.0	296.8	7.8
All Others	264.2	208.3	26.8	545.0	473.6	15.1
Visitor arrivals by cruise ships	3.6	3.9	-8.8	7.5	9.7	-22.2
TOTAL VISITOR DAYS	7,083,023	6,529,752	8.5	15,126,876	14,257,061	6.1
Total by air	7,031,842	6,472,227	8.6	15,021,212	14,119,696	6.4
U.S. West	2,646,509	2,417,958	9.5	5,742,971	5,168,796	11.1
U.S. East	1,816,636	1,676,082	8.4	3,910,768	3,771,327	3.7
Japan	743,172	713,058	4.2	1,458,227	1,446,579	0.8
Canada	817,282	808,523	1.1	1,791,721	1,734,184	3.3
All Others	1,008,243	856,606	17.7	2,117,525	1,998,811	5.9
Visitor arrivals by cruise ships	51,182	57,525	-11.0	105,664	137,365	-23.1
VISITOR ARRIVALS	778,571	706,113	10.3	1,575,054	1,462,102	7.7
Total by air	764,043	692,709	10.3	1,548,280	1,431,268	8.2
U.S. West	294,082	261,415	12.5	598,173	528,185	13.3
U.S. East	176,435	159,940	10.3	354,397	332,610	6.6
Japan	124,648	123,577	0.9	243,415	246,967	-1.4
Canada	63,863	60,905	4.9	133,026	125,840	5.7
All Others	105,016	86,871	20.9	219,269	197,666	10.9
Visitor arrivals by cruise ships	14,528	13,404	8.4	26,774	30,834	-13.2
AVERAGE LENGTH OF STAY	9.10	9.25	-1.6	9.60	9.75	-1.5
Total by air	9.20	9.34	-1.5	9.70	9.87	-1.7
U.S. West	9.00	9.25	-2.7	9.60	9.79	-1.9
U.S. East	10.30	10.48	-1.7	11.03	11.34	-2.7
Japan	5.96	5.77	3.3	5.99	5.86	2.3
Canada	12.80	13.28	-3.6	13.47	13.78	-2.3
All Others	9.60	9.86	-2.6	9.66	10.11	-4.5
Visitor arrivals by cruise ships	3.52	4.29	-17.9	3.95	4.46	-11.4
PER PERSON PER DAY SPENDING ($)	215.1	207.0	3.9	212.3	207.7	2.2
Total by air	216.2	208.2	3.8	213.3	209.0	2.0
U.S. West	186.8	194.4	-3.9	188.7	196.2	-3.8
U.S. East	225.6	213.6	5.6	220.0	209.8	4.9
Japan	273.0	246.1	10.9	270.7	259.8	4.2
Canada	182.1	167.9	8.5	178.6	171.1	4.4
All Others	262.1	243.2	7.8	257.4	236.9	8.6
Visitor arrivals by cruise ships	70.1	68.4	2.5	71.2	70.4	1.1
PER PERSON PER TRIP SPENDING ($)	1,957.2	1,914.1	2.3	2,039.1	2,025.2	0.7
Total by air	1,989.7	1,945.4	2.3	2,069.5	2,062.1	0.4
U.S. West	1,681.3	1,797.7	-6.5	1,812.0	1,919.8	-5.6
U.S. East	2,322.8	2,238.9	3.7	2,428.0	2,378.8	2.1
Japan	1,627.4	1,420.3	14.6	1,621.7	1,522.0	6.6
Canada	2,331.0	2,228.8	4.6	2,405.7	2,358.3	2.0
All Others	2,516.2	2,398.1	4.9	2,485.5	2,395.7	3.7
Visitor arrivals by cruise ships	247.0	293.7	-15.9	281.0	313.8	-10.5

P=Preliminary data.

Source:Haw ai'i Tourism Authority

FEBRUARY 2018 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES ($mil.)	1,523.8	1,351.6	12.7	3,211.6	2,961.1	8.5
Total by air	1,520.2	1,347.6	12.8	3,204.1	2,951.4	8.6
O'ahu	673.9	563.4	19.6	1,335.9	1,238.4	7.9
Maui	429.8	405.3	6.1	978.3	870.0	12.4
Moloka'i	4.4	3.7	20.3	7.2	9.6	-25.1
Lāna'i	8.9	4.9	82.1	20.2	12.6	59.8
Kaua'i	157.9	156.8	0.7	349.1	343.7	1.6
Haw ai'i Island	245.3	213.6	14.8	513.4	476.9	7.7
Visitor arrivals by cruise ships	3.6	3.9	-8.8	7.5	9.7	-22.2
TOTAL VISITOR DAYS	7,083,023	6,529,752	8.5	15,126,876	14,257,061	6.1
Total by air	7,031,842	6,472,227	8.6	15,021,212	14,119,696	6.4
O'ahu	3,110,647	2,883,001	7.9	6,499,912	6,185,023	5.1
Maui	1,854,264	1,745,058	6.3	4,018,306	3,799,642	5.8
Moloka'i	28,925	27,715	4.4	65,549	66,572	-1.5
Lāna'i	20,970	14,707	42.6	46,194	31,705	45.7
Kaua'i	807,582	739,187	9.3	1,772,649	1,626,591	9.0
Haw ai'i Island	1,209,454	1,062,560	13.8	2,618,603	2,410,164	8.6
Visitor arrivals by cruise ships	51,182	57,525	-11.0	105,664	137,365	-23.1
VISITOR ARRIVALS	778,571	706,113	10.3	1,575,054	1,462,102	7.7
Total by air	764,043	692,709	10.3	1,548,280	1,431,268	8.2
O'ahu	456,916	419,723	8.9	917,434	866,293	5.9
Maui	217,554	202,578	7.4	448,135	420,992	6.4
Moloka'i	5,791	4,674	23.9	11,034	10,210	8.1
Lāna'i	6,222	4,360	42.7	12,460	8,999	38.5
Kaua'i	103,956	94,381	10.1	213,239	193,736	10.1
Haw ai'i Island	161,468	136,421	18.4	319,825	287,533	11.2
Visitor arrivals by cruise ships	14,528	13,404	8.4	26,774	30,834	-13.2
AVERAGE LENGTH OF STAY	9.10	9.25	-1.6	9.60	9.75	-1.5
Total by air	9.20	9.34	-1.5	9.70	9.87	-1.7
O'ahu	6.81	6.87	-0.9	7.08	7.14	-0.8
Maui	8.52	8.61	-1.1	8.97	9.03	-0.7
Moloka'i	4.99	5.93	-15.8	5.94	6.52	-8.9
Lāna'i	3.37	3.37	-0.1	3.71	3.52	5.2
Kaua'i	7.77	7.83	-0.8	8.31	8.40	-1.0
Haw ai'i Island	7.49	7.79	-3.8	8.19	8.38	-2.3
Visitor arrivals by cruise ships	3.52	4.29	-17.9	3.95	4.46	-11.4
PER PERSON PER DAY SPENDING ($)	215.1	207.0	3.9	212.3	207.7	2.2
Total by air	216.2	208.2	3.8	213.3	209.0	2.0
O'ahu	216.6	195.4	10.9	205.5	200.2	2.6
Maui	231.8	232.2	-0.2	243.5	229.0	6.3
Moloka'i	152.5	132.3	15.3	109.9	144.6	-24.0
Lāna'i	425.6	333.2	27.7	437.6	398.9	9.7
Kaua'i	195.6	212.1	-7.8	196.9	211.3	-6.8
Haw ai'i Island	202.8	201.0	0.9	196.1	197.9	-0.9
Visitor arrivals by cruise ships	70.1	68.4	2.5	71.2	70.4	1.1
PER PERSON PER TRIP SPENDING ($)	1,957.2	1,914.1	2.3	2,039.1	2,025.2	0.7
Total by air	1,989.7	1,945.4	2.3	2,069.5	2,062.1	0.4
O'ahu	1,474.9	1,342.3	9.9	1,456.1	1,429.6	1.9
Maui	1,975.6	2,000.5	-1.2	2,183.0	2,066.6	5.6
Moloka'i	761.5	784.4	-2.9	653.1	942.7	-30.7
Lāna'i	1,434.3	1,124.0	27.6	1,622.3	1,405.2	15.4
Kaua'i	1,519.1	1,661.3	-8.6	1,637.2	1,774.3	-7.7
Haw ai'i Island	1,519.1	1,565.9	-3.0	1,605.4	1,658.6	-3.2
Visitor arrivals by cruise ships	247.0	293.7	-15.9	281.0	313.8	-10.5

P=Preliminary data.

Source:Haw ai'i Tourism Authority