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HTA Release (18-32)

## **Hawai'i Visitor Spending Increased 13.4 Percent to \$1.42 Billion in April 2018**

**HONOLULU** – Visitors to the Hawaiian Islands spent a total of \$1.42 billion in April 2018, an increase of 13.4 percent compared to last year, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA).

Hawai'i's four largest visitor markets, U.S. West (+11.7% to \$547.8 million), U.S. East (+4% to \$310.5 million), Japan (+7.1% to \$155.9 million) and Canada (+10% to \$99.4 million), all reported gains in visitor spending in April year-over-year. Combined visitor spending from All Other International Markets (+34.7% to \$297.6 million) also increased in April versus last year.

Visitors also spent more on an average daily basis from U.S. West (+4.8% to \$184 per person), U.S. East (+1.4% to \$218 per person), Japan (+4.5% to \$232 per person) and Canada (+7.6% to \$160 per person) in April compared to a year ago.

Total visitor arrivals rose 6.6 percent to 803,005 visitors in April, supported by growth in arrivals from both air service (+6.5% to 786,053) and cruise ships (+11.7% to 16,951). Total visitor days<sup>1</sup> increased 5.5 percent in April. The average daily census<sup>2</sup>, or the number of visitors on any given day in April, was 227,729, up 5.5 percent compared to April of last year.

Visitor arrivals increased from U.S. West (+8% 347,729), U.S. East (+4.1% to 153,606), Japan (+2.9% to 112,734), Canada (+6.4% to 52,073) and All Other International Markets (+9.2% to 119,910) in April versus last year.

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

A total of 1,084,745 trans-Pacific air seats serviced the Hawaiian Islands in April, up 10.9 percent from a year ago. Growth in air seat capacity from Oceania (+15.5%), U.S. West (+14.8%), U.S. East (+12%), Canada (+1.1%) and Japan (+0.7%) offset fewer seats from Other Asia (-0.8%).

### Year-to-Date 2018

Year-to-date through April 2018, visitor spending (+10.8% to \$6.24 billion) surpassed the results from the same period last year. Visitor spending increased from U.S. West (+9.5% to \$2.22 billion), U.S. East (+11% to \$1.59 billion), Japan (+8.9% to \$771.5 million), Canada (+8% to \$567.6 million) and from All Other International Markets (+16.7% to \$1.07 billion) compared to last year.

Statewide average daily spending rose to \$210 per person (+3.6%) through the first four months of 2018 compared to the same period of a year ago.

Year-to-date, statewide visitor arrivals increased (+8.7% to 3,281,609) versus last year. Visitor arrivals increased from U.S. West (+12% to 1,310,192), U.S. East (+8.4% to 721,101), Canada (+6.3% to 259,760) and All Other International Markets (+12.8% to 438,249), while arrivals from Japan (+0.4% to 495,399) were comparable.

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

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

### Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Pacific (+7.6%) and Mountain (+10.9%) regions in April compared to a year ago, with growth reported from Oregon (+27.6%), Utah (+21.7%), Colorado (+20%), Washington (+12.3%), Arizona (+8.9%) and California (+4.4%). Through the first four months, arrivals rose from the Mountain (+12.7%) and Pacific (+12%) regions versus the same period last year.
- **U.S. East:** In April, growth in visitor arrivals from the New England (+29.5%), West South Central (+22.9%), East South Central (+8.5%), West North Central (+5.6%) and East North Central (+3.7%) regions offset decreases from the Mid Atlantic (-11%) and South Atlantic (-1%) regions. Year-to-date through April, all regions showed increases in arrivals, highlighted by growth from the two largest regions, South Atlantic (+10.1%) and East North Central (+10.1%).
- **Japan:** Visitor arrivals in April were boosted by the start of Golden Week, traditionally a period of growth for outbound Japan travel. Golden Week is a string of four holidays that occurs from April 29 through May 5 each year. The combination of holidays and weekends creates a longer-than-normal vacation period that is favorable to long-haul destinations like Hawai'i. Visitors traveling to Hawai'i for Golden Week started arriving April 28. More visitors stayed in hotels (+4.4%) in April versus last year. Stays in condominiums (+0.3%) were similar to last April, while stays in timeshares (-1.8%) were down. Fewer visitors purchased group tours (-5.2%) and package trips (-4.7%), while more visitors made their own travel arrangements (+15.8%).
- **Canada:** Significantly more visitors stayed in rental homes (+46%) in April. Stays in hotels (+7.1%) also increased compared to last April.
- **MCI:** A total of 52,982 visitors came for meetings, conventions and incentives (MCI) in April, up 8.3 percent compared to last year. More visitors came to attend conventions (+28.5%) but fewer visitors traveled on incentive trips (-9% to 19,527) compared to last April. Contributing to the growth in convention visitors were the more than 10,000 out-of-state delegates who attended the 2018 Association for Research in Vision and Ophthalmology event at the Hawai'i Convention Center. Year-to-date through April, total MCI visitors was up slightly (+0.6% to 199,570) from the same period last year.

### Highlights from All Other Markets:

- **Australia:** There were 26,939 visitors in April, which was virtually unchanged from a year ago. Through the first four months of 2018, arrivals increased (+3.9% to 94,667 visitors) compared to the same period in 2017.
- **New Zealand:** Supported by increased air service, visitor arrivals rose significantly in April (+58.7% to 9,007) and year-to-date (+40.7% to 20,331) compared to last year.
- **China:** Visitor arrivals decreased in April (-7.6% to 12,731) and through the first four months of 2018 (-4% to 48,857) compared to a year ago.
- **Korea:** Visitor arrivals were up slightly in April (+0.8% to 16,357). Year-to-date, arrivals rose 16 percent to 90,499 visitors.
- **Taiwan:** Visitor arrivals increased in April (+10% to 1,367), but have declined year-to-date (-5.1% to 5,743).

- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland increased in April (+7.6% to 13,043) and through the first four months of 2018 (+7.6% to 39,633) compared to a year ago.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina declined in April (-1.2% to 2,218), but have increased year-to-date (+27.2% to 10,101).

#### **Island Highlights:**

- **O'ahu:** Visitor spending increased in April (+15.9% to \$634.4 million), boosted by growth in visitor days (+4.1%) and higher average daily spending (+11.3% to \$210 per person) versus April of last year. Visitor arrivals were up (+3.9% to 454,545), with growth from Canada (+9.3%), U.S. West (+3.4%), U.S. East (+0.6%) and Japan (+0.6%). The average daily census rose 4.1 percent to 100,692 visitors in April.

Through the first four months of 2018, both visitor spending (+9.9% to \$2.65 billion) and arrivals (+6.4% to 1,882,938) increased compared to a year ago.

- **Maui:** Visitor spending grew in April (+11.3% to \$413.3 million), supported by increases in visitor days (+3.5%) and daily spending (+7.6% to \$226 per person). Visitor arrivals rose (+4.5% to 236,680) with more visitors from Canada (+10.2%), U.S. West (+5.9%) and U.S. East (+2.7%) offsetting fewer visitors from Japan (-4.2%). The average daily census grew 3.5 percent to 61,043 visitors in April.

Year-to-date, visitor spending (+12.4% to \$1.87 billion) and arrivals (+6.5% to 944,684) exceeded the results from a year ago.

- **Island of Hawai'i:** Visitor spending increased in April (+9.8% to \$194.6 million), spurred by growth in visitor days (+9.1%). Daily spending rose slightly (+0.7% to \$184 per person) compared to a year ago. Visitor arrivals were up (+11.4% to 153,180) supported by increased direct air service from the U.S. and Japan. There were more visitors from Japan (+33.7%), U.S. West (+12.2%), U.S. East (+3.9%) and Canada (+3.2%). The average daily census grew 9.1 percent to 35,259 visitors in April.

Through the first four months, growth was realized in both visitor spending (+12.7% to \$966.6 million) and arrivals (+12.5% to 648,738) versus last year.

- **Kaua'i:** Visitor spending (+11.9% to \$157.4 million), visitor days (+9.4%) and average daily spending (+2.3% to \$195 per person) were all higher in April compared to a year ago. Visitor arrivals increased (+9.9% to 111,304), with more visitors from Japan (+19.5%), Canada (+14.2%), U.S. West (+13.2%) and U.S. East (+6.2%). The average daily census rose 9.4 percent to 26,871 visitors in April.

Through the first four months, both visitor spending (+7.2% to \$683.8 million) and arrivals (+13.2% to 449,876) increased compared to the same period last year.

### **Air Seats to Hawai'i:**

In April, total air seat capacity increased 10.9 percent to 1,084,745 seats with growth in scheduled air seats (+10.7% to 1,075,582) and charter seats (+27.6% to 9,163). More seats served Līhu'e (+56.5%), Kona (+45%), Hilo (+42.9%), Kahului (+13.5%) and Honolulu (+2.1%) compared to last year.

- Scheduled air seats from the U.S. West market rose (+14.8%) in April, boosted by growth in seats from Denver (+45.5%), Los Angeles (+18.3%), Portland (+41.7%), San Francisco (+26.5%) and San Jose (+27.5%).
- Scheduled air seats from the U.S. East market increased 12 percent in April compared to a year ago. Growth in seats from Chicago (+50.9%), Dallas (+27.5%), Newark (+12.4%) and Washington D.C. (+62.1%) offset fewer seats from Atlanta (-16%) and Minneapolis (-44.4%).
- Scheduled air seats from Japan rose slightly in April (+0.7%). Air seat capacity to Kona nearly tripled (+150.8% to 9,584 seats), with the launch of nonstop service from Narita in September 2017. A low-cost carrier serving the Kuala Lumpur-Osaka-Honolulu route (+6,409 seats) and a low-cost carrier serving the Singapore-Osaka-Honolulu route (+5,689 seats) combined added more than 12,000 new seats in April 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. A U.S. carrier also reduced seats on its Narita-Honolulu route (-5,700 seats) and its Osaka-Honolulu route (-2,400 seats).
- Scheduled air seats from Canada increased 1.1 percent in April compared to last year, with more seats added from Vancouver.
- Scheduled air seats from Oceania grew in April (+15.5%) mainly due to more seats being added from Auckland, New Zealand (+77.6%). Total seats from Brisbane, Melbourne and Sydney, Australia declined (-1.3%) compared to a year ago.
- Scheduled air seats from Other Asia markets dropped slightly in April (-0.8%). There were fewer combined seats from Beijing and Shanghai in China (-6.1%) compared to last year. However, there were more seats from Taipei (+10.9%) compared to last April. Seats from Seoul also increased (+1.4%) even though a low-cost carrier had suspended service in both April 2018 and 2017 for maintenance of its aircrafts.
- Through the first four months, air seat capacity statewide increased (+10.6% to 4,386,806 seats) compared to the same period last year. Seats increased to Hilo (+53.8%), Līhu'e (+52.8%), Kona (+33.6%), Kahului (+10.5%) and Honolulu (+3.9%).

### **Cruise Ship Visitors:**

- In April, seven out-of-state cruise ships brought 16,951 visitors to Hawai'i compared to eight ships that carried 15,181 visitors a year ago. Arrivals by air service to board cruise ships declined 19.3 percent, as there were four Saturdays this April which allowed for four tours of the Hawai'i home-ported cruise ship compared to five Saturdays and five tours in April of last year. Total cruise visitors decreased (-3.5% to 28,734) this April compared to a year ago.
- Year-to-date through April, there were 56,909 visitors who entered Hawai'i aboard 31 out-of-state cruise ships in comparison to 32 cruise ships with 56,146 visitors in the same period last year. Total cruise visitors (arrivals by cruise ships and by air to board cruise ships) increased year-to-date (+1.1% to 99,350) 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.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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APRIL 2018 ARRIVALS AT A GLANCE

CATEGORY AND MMA	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,418.4</b>	<b>1,250.4</b>	<b>13.4</b>	<b>6,241.1</b>	<b>5,630.5</b>	<b>10.8</b>
Total by air	1,411.1	1,245.8	13.3	6,222.2	5,613.7	10.8
U.S. West	547.8	490.4	11.7	2,217.7	2,025.6	9.5
U.S. East	310.5	298.6	4.0	1,590.8	1,433.6	11.0
Japan	155.9	145.6	7.1	771.5	708.6	8.9
Canada	99.4	90.4	10.0	567.6	525.4	8.0
All Others	297.6	220.9	34.7	1,074.6	920.5	16.7
Visitor arrivals by cruise ships	7.3	4.6	58.2	18.8	16.8	12.4
<b>TOTAL VISITOR DAYS</b>	<b>6,831,863</b>	<b>6,478,220</b>	<b>5.5</b>	<b>29,761,785</b>	<b>27,810,076</b>	<b>7.0</b>
Total by air	6,756,199	6,411,268	5.4	29,523,646	27,567,196	7.1
U.S. West	2,973,588	2,788,834	6.6	11,853,069	10,766,936	10.1
U.S. East	1,423,796	1,387,703	2.6	7,303,045	6,906,003	5.7
Japan	671,524	655,349	2.5	2,943,856	2,921,493	0.8
Canada	622,149	608,486	2.2	3,305,912	3,207,696	3.1
All Others	1,065,143	970,896	9.7	4,117,763	3,765,068	9.4
Visitor arrivals by cruise ships	75,664	66,952	13.0	238,139	242,880	-2.0
<b>VISITOR ARRIVALS</b>	<b>803,005</b>	<b>752,964</b>	<b>6.6</b>	<b>3,281,609</b>	<b>3,017,867</b>	<b>8.7</b>
Total by air	786,053	737,783	6.5	3,224,700	2,961,721	8.9
U.S. West	347,729	321,877	8.0	1,310,192	1,170,308	12.0
U.S. East	153,606	147,532	4.1	721,101	665,420	8.4
Japan	112,734	109,604	2.9	495,399	493,306	0.4
Canada	52,073	48,952	6.4	259,760	244,261	6.3
All Others	119,910	109,818	9.2	438,249	388,426	12.8
Visitor arrivals by cruise ships	16,951	15,181	11.7	56,909	56,146	1.4
<b>AVERAGE LENGTH OF STAY</b>	<b>8.51</b>	<b>8.60</b>	<b>-1.1</b>	<b>9.07</b>	<b>9.22</b>	<b>-1.6</b>
Total by air	8.60	8.69	-1.1	9.16	9.31	-1.6
U.S. West	8.55	8.66	-1.3	9.05	9.20	-1.7
U.S. East	9.27	9.41	-1.5	10.13	10.38	-2.4
Japan	5.96	5.98	-0.4	5.94	5.92	0.3
Canada	11.95	12.43	-3.9	12.73	13.13	-3.1
All Others	8.88	8.84	0.5	9.40	9.69	-3.1
Visitor arrivals by cruise ships	4.46	4.41	1.2	4.18	4.33	-3.3
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>207.6</b>	<b>193.0</b>	<b>7.6</b>	<b>209.7</b>	<b>202.5</b>	<b>3.6</b>
Total by air	208.9	194.3	7.5	210.8	203.6	3.5
U.S. West	184.2	175.8	4.8	187.1	188.1	-0.5
U.S. East	218.1	215.1	1.4	217.8	207.6	4.9
Japan	232.1	222.1	4.5	262.1	242.6	8.0
Canada	159.8	148.6	7.6	171.7	163.8	4.8
All Others	279.4	227.5	22.8	261.0	244.5	6.7
Visitor arrivals by cruise ships	96.4	68.9	40.0	79.1	69.0	14.6
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,766.4</b>	<b>1,660.7</b>	<b>6.4</b>	<b>1,901.8</b>	<b>1,865.7</b>	<b>1.9</b>
Total by air	1,795.2	1,688.6	6.3	1,929.5	1,895.4	1.8
U.S. West	1,575.3	1,523.6	3.4	1,692.7	1,730.8	-2.2
U.S. East	2,021.2	2,023.7	-0.1	2,206.1	2,154.4	2.4
Japan	1,382.7	1,328.0	4.1	1,557.2	1,436.5	8.4
Canada	1,908.9	1,846.6	3.4	2,185.2	2,150.9	1.6
All Others	2,482.0	2,011.5	23.4	2,452.1	2,369.8	3.5
Visitor arrivals by cruise ships	430.4	303.7	41.7	331.0	298.5	10.9

P=Preliminary data.

Source:Haw aii Tourism Authority

APRIL 2018 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,418.4</b>	<b>1,250.4</b>	<b>13.4</b>	<b>6,241.1</b>	<b>5,630.5</b>	<b>10.8</b>
Total by air	1,411.1	1,245.8	13.3	6,222.2	5,613.7	10.8
O'ahu	634.4	547.1	15.9	2,647.2	2,409.7	9.9
Maui	413.3	371.2	11.3	1,871.3	1,664.9	12.4
Moloka'i	4.4	2.3	88.3	12.9	14.8	-13.2
Lāna'i	7.0	7.4	-4.6	40.5	29.3	38.1
Kaua'i	157.4	140.6	11.9	683.8	637.6	7.2
Haw ai'i Island	194.6	177.2	9.8	966.6	857.4	12.7
Visitor arrivals by cruise ships	7.3	4.6	58.2	18.8	16.8	12.4
<b>TOTAL VISITOR DAYS</b>	<b>6,831,863</b>	<b>6,478,220</b>	<b>5.5</b>	<b>29,761,785</b>	<b>27,810,076</b>	<b>7.0</b>
Total by air	6,756,199	6,411,268	5.4	29,523,646	27,567,196	7.1
O'ahu	3,020,770	2,900,729	4.1	12,924,788	12,256,960	5.4
Maui	1,831,288	1,769,384	3.5	7,953,816	7,525,670	5.7
Moloka'i	19,272	18,042	6.8	109,601	109,746	-0.1
Lāna'i	20,991	16,468	27.5	92,445	69,534	33.0
Kaua'i	806,117	736,819	9.4	3,497,512	3,128,703	11.8
Haw ai'i Island	1,057,761	969,827	9.1	4,945,484	4,476,583	10.5
Visitor arrivals by cruise ships	75,664	66,952	13.0	238,139	242,880	-2.0
<b>VISITOR ARRIVALS</b>	<b>803,005</b>	<b>752,964</b>	<b>6.6</b>	<b>3,281,609</b>	<b>3,017,867</b>	<b>8.7</b>
Total by air	786,053	737,783	6.5	3,224,700	2,961,721	8.9
O'ahu	454,545	437,436	3.9	1,882,938	1,769,001	6.4
Maui	236,680	226,511	4.5	944,684	886,859	6.5
Moloka'i	5,833	3,852	51.4	21,701	19,579	10.8
Lāna'i	6,532	5,508	18.6	25,885	20,657	25.3
Kaua'i	111,304	101,293	9.9	449,876	397,398	13.2
Haw ai'i Island	153,180	137,459	11.4	648,738	576,868	12.5
Visitor arrivals by cruise ships	16,951	15,181	11.7	56,909	56,146	1.4
<b>AVERAGE LENGTH OF STAY</b>	<b>8.51</b>	<b>8.60</b>	<b>-1.1</b>	<b>9.07</b>	<b>9.22</b>	<b>-1.6</b>
Total by air	8.60	8.69	-1.1	9.16	9.31	-1.6
O'ahu	6.65	6.63	0.2	6.86	6.93	-0.9
Maui	7.74	7.81	-0.9	8.42	8.49	-0.8
Moloka'i	3.30	4.68	-29.5	5.05	5.61	-9.9
Lāna'i	3.21	2.99	7.5	3.57	3.37	6.1
Kaua'i	7.24	7.27	-0.4	7.77	7.87	-1.3
Haw ai'i Island	6.91	7.06	-2.1	7.62	7.76	-1.8
Visitor arrivals by cruise ships	4.46	4.41	1.2	4.18	4.33	-3.3
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>207.6</b>	<b>193.0</b>	<b>7.6</b>	<b>209.7</b>	<b>202.5</b>	<b>3.6</b>
Total by air	208.9	194.3	7.5	210.8	203.6	3.5
O'ahu	210.0	188.6	11.3	204.8	196.6	4.2
Maui	225.7	209.8	7.6	235.3	221.2	6.3
Moloka'i	226.1	128.2	76.3	117.5	135.1	-13.0
Lāna'i	334.8	447.3	-25.2	437.7	421.4	3.8
Kaua'i	195.2	190.8	2.3	195.5	203.8	-4.1
Haw ai'i Island	184.0	182.7	0.7	195.5	191.5	2.1
Visitor arrivals by cruise ships	96.4	68.9	40.0	79.1	69.0	14.6
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,766.4</b>	<b>1,660.7</b>	<b>6.4</b>	<b>1,901.8</b>	<b>1,865.7</b>	<b>1.9</b>
Total by air	1,795.2	1,688.6	6.3	1,929.5	1,895.4	1.8
O'ahu	1,395.7	1,250.8	11.6	1,405.9	1,362.2	3.2
Maui	1,746.4	1,638.8	6.6	1,980.9	1,877.3	5.5
Moloka'i	747.0	600.5	24.4	593.2	757.1	-21.7
Lāna'i	1,076.0	1,337.6	-19.6	1,563.0	1,418.6	10.2
Kaua'i	1,413.9	1,387.8	1.9	1,520.0	1,604.4	-5.3
Haw ai'i Island	1,270.6	1,289.1	-1.4	1,490.0	1,486.2	0.3
Visitor arrivals by cruise ships	430.4	303.7	41.7	331.0	298.5	10.9

P=Preliminary data.

Source:Haw ai'i Tourism Authority