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Hawai'i Visitor Spending Increased 4.8 Percent to \$1.66 Billion in July 2018

HONOLULU – Visitors to the Hawaiian Islands spent a total of \$1.66 billion in July 2018, an increase of 4.8 percent compared to a year ago, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA).

Among Hawai'i's four largest visitor markets, the U.S. West (+6.2% to \$636.2 million), Japan (+7.2% to \$206.4 million) and Canada (+18.8% to \$55.3 million) reported gains in visitor spending, while growth from the U.S. East was flat (+0.4% to \$454.3 million) compared to a year ago. Combined visitor spending from All Other International Markets (+5.1% to \$310.4 million) increased in July.

On a statewide level, there was no growth in visitor spending on an average daily basis (-0.4% to \$195 per person) in July versus last year. Visitors from Japan (+5.4%), Canada (+8.3%) and All Other International Markets (+1.5%) spent more per day than in July 2017, while visitors from U.S. East (-3.9%) and U.S. West (-0.7%) spent less.

Total visitor arrivals rose 5.3 percent to 939,360 visitors in July – the most ever for any month in Hawai'i's history – comprised of arrivals by air service (+5.7% to 938,608 visitors) and cruise ships (-79.3% to 752 visitors). Total visitor days¹ rose 5.3 percent. The average daily census², or the number of visitors on any given day in July statewide, was 274,883, up 5.3 percent from last year.

Visitor arrivals by air service increased from U.S. West (+9.1% to 420,204), U.S. East (+6.8% to 222,694), Japan (+1.3% to 138,060) and Canada (+3.1% to 27,527), but declined from All Other International Markets (-1% to 130,122).

O'ahu recorded increases in both visitor spending (+1.2% to \$773.7 million) and visitor arrivals (+2% to 566,059) in July compared to last year. Maui also saw growth in visitor spending (+11.3% to \$481.5 million) and arrivals (+12.7% to 295,110), as did Kaua'i with gains in visitor spending (+17.6% to \$194.6 million) and arrivals (+7.3% to 137,641). The island of Hawai'i recorded decreases in visitor spending (-7.2% to \$201.1 million) and arrivals (-12.7% to 153,906) compared to last year.

A total of 1,203,885 trans-Pacific air seats – the highest monthly total in Hawai'i's history – serviced the Hawaiian Islands in July, up 5.6 percent from a year ago with growth in air seat capacity from U.S. East (+8.5%), Oceania (+8.3%), U.S. West (+7.3%), and Canada (+1.9%) offsetting fewer seats from Other Asia (-8.3%) and Japan (-1%).

Year-to-Date 2018

Year-to-date through July 2018, statewide visitor spending of \$10.92 billion (+9.8%) surpassed the results for the same period last year. Visitor spending increased from U.S. West (+9.8% to \$4.02 billion), U.S. East (+9.2% to \$2.91 billion), Japan (+7.2% to \$1.34 billion), Canada (+7.6% to \$705.3 million) and from All Other International Markets (+13.7% to \$1.92 billion).

Statewide average daily spending by visitors rose to \$205 per person (+2.7%) through the first seven months of 2018.

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, visitor arrivals statewide were up (+7.7% to 5,922,203) versus last year, with increases from U.S. West (+10.9% to 2,485,758), U.S. East (+8.1% to 1,353,477), Japan (+1.2% to 884,644), Canada (+5.4% to 332,665) and All Other International Markets (+8% to 798,904).

All four larger Hawaiian Islands realized growth in both visitor spending and arrivals over the first seven months compared to last year.

Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Mountain (+9.7%) and Pacific (+9%) regions in July compared to a year ago, with growth reported from Utah (+15.4%), Arizona (+14.3%), Colorado (+10.3%), California (+9.5%) and Washington (+8.8%). Through the first seven months, arrivals rose from the Mountain (+13.3%) and Pacific (+10.5%) regions versus the same period last year.
- **U.S. East:** Visitor arrivals increased from every region in July compared to a year ago. Year-to-date, visitor arrivals were up from all regions, highlighted by growth from the two largest regions, East North Central (+9.9%) and South Atlantic (+8.9%).
- **Japan:** More visitors stayed in hotels (+1.3%) in July compared to last year, while stays in timeshares (-13.7%) and condominiums (-1%) declined. Additionally, more visitors made their own travel arrangements (+9.6%) while fewer visitors purchased group tours (-5.8%) and package trips (-6.6%).
- **Canada:** In July, visitor stays in hotels (-6%) and timeshares (-19.3%) decreased but stays in condominiums (+16.4%) and rental homes (+38.3%) increased compared to a year ago.
- **MCI:** A total of 30,482 visitors came to Hawai'i for meetings, conventions and incentives (MCI) in July, a drop of 25.9 percent from last year. Fewer visitors came to attend conventions (-27.5% to 18,985) and traveled on incentive trips (-37.7% to 6,649) compared to a year ago when an engineering convention (4,500 delegates) and private corporate event (3,500) were held at the Hawai'i Convention Center. Year-to-date, the number of MCI visitors declined (-2.6% to 319,583) compared to the same period last year.

Highlights from All Other Markets:

- **Australia:** There were 28,699 visitor arrivals in July, up slightly (+0.9%) from a year ago. Arrivals also increased through the first seven months (+2.7% to 183,160 visitors) compared to the same period last year.
- **New Zealand:** Supported by increased air service, visitor arrivals rose significantly in both July (+24.3% to 10,942) and year-to-date (+35.4% to 48,605).
- **China:** Visitor arrivals decreased in July (-15.5% to 11,400) and year-to-date (-3.8% to 92,719) compared to a year ago.
- **Korea:** Visitor arrivals declined in July versus last year (-16.5% to 17,887), partially due to reduced seat capacity as a low-cost carrier suspended service to Hawai'i from March through mid-July 2018. Year-to-date, arrivals increased 4.6 percent to 140,859 visitors.
- **Taiwan:** Visitor arrivals decreased in July (-23.4% to 1,438) and year-to-date (-6.5% to 10,448).

- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland increased in July (+5.3% to 17,293) and through the first seven months (+5.8% to 77,750) compared to a year ago.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina were flat in July (-0.4% to 3,079) but increased over the first seven months (+15.9% to 16,929) compared to last year.

Island Highlights:

- **O'ahu:** Visitor spending increased in July (+1.2% to \$773.7 million), boosted by growth in visitor days (+5.3%). The average daily spending was lower (-3.8% to \$194 per person) compared to July of last year. Visitor arrivals were up (+2% to 566,059) compared to a year ago. There were increases from U.S. West (+6.9%) and U.S. East (+1.9%) but no growth from Canada (+0.4%) and Japan (-0.4%). The average daily census rose 5.3 percent to 128,891 visitors in July.

Through the first seven months, both visitor spending (+9% to \$4.85 billion) and arrivals (+5.5% to 3,480,379) increased compared to a year ago.

- **Maui:** Visitor spending grew in July (+11.3% to \$481.5 million), supported by increases in visitor days (+13.7%), which offset lower daily spending (-2.1% to \$207 per person). Visitor arrivals rose (+12.7% to 295,110) with more visitors from Canada (+26.8%), U.S. West (+16%) and U.S. East (+8.5%) offsetting fewer visitors from Japan (-17.6%). The average daily census increased 13.7 percent to 74,929 visitors in July.

Year-to-date, visitor spending (+12.1% to \$3.19 billion) and arrivals (+8.4% to 1,758,623) exceeded the results from a year ago.

- **Island of Hawai'i:** Visitor spending declined in July (-7.2% to \$201.1 million) as a result of decreased visitor days (-8.4%). Average daily spending of \$177 per person (+1.4%) was higher versus last July. Visitor arrivals were down (-12.7% to 153,906) due to fewer visitors from Japan (-18.1%), U.S. East (-11%) and U.S. West (-7.1%). Significantly fewer visitors (-37.7%) took day trips compared to a year ago. The average daily census decreased 8.4 percent to 36,753 visitors in July.

Through the first seven months, there continued to be growth in visitor spending (+6.8% to \$1.54 billion) and arrivals (+3.8% to 1,084,324) compared to last year.

- **Kaua'i:** Visitor spending (+17.6% to \$194.6 million), visitor days (+5.1%) and average daily spending (+12% to \$192 per person) were all notably higher in July compared to a year ago. Visitor arrivals increased (+7.3% to 137,641), with more visitors from Canada (+51.5%), Japan (+24.1%), U.S. East (+6.8%) and U.S. West (+5.7%). The average daily census rose 5.1 percent to 32,686 visitors in July.

Through the first seven months, both visitor spending (+10.5% to \$1.24 billion) and visitor arrivals (+10.8% to 836,016) increased compared to the same period last year.

Air Seats to Hawai'i:

Total trans-Pacific air seat capacity serving the Hawaiian Islands increased by 5.6 percent to 1,203,885 seats in July year-over-year, supported by growth in scheduled air seats (+5.2% to 1,192,861) and charter seats (+75.2% to 11,024). There were more seats to Kona (+29.6%), Kahului (+15.3%), Līhu'e (+12%) and Hilo (+5.7%) but slightly fewer seats to Honolulu (-0.8%) compared to a year ago.

- Scheduled air seats from the U.S. West market rose (+7.3%) in July, boosted by the addition of daily service from Long Beach (+5,859 seats, started June 2018) and increased service from San Diego (+31.7%), Portland (+23.6%), Denver (+19.4%), San Jose (+17%), San Francisco (+11.3%) and Seattle (+10.3%). These increases offset fewer seats from Oakland (-19.2%), Salt Lake City (-13.4%) Phoenix (-12.6%) and Las Vegas (-11.1%).
- Scheduled air seats from the U.S. East market increased 8.5 percent in July compared to a year ago. Growth in seats from Chicago (+47.2%), Dallas (+12.1%) and Newark (+12.1%) offset fewer seats from Atlanta (-16%) and Washington D.C. (-11.6%).
- Scheduled air seats from Japan decreased slightly in July (-1.0%). Air seat capacity to Kona nearly tripled (+170.7% to 9,783 seats), with the launch of nonstop service from Narita in September 2017. The launch of service from Singapore-Osaka-Honolulu by a low-cost carrier in December 2017 also added nearly 6,000 new seats in July year-over-year. However, these increases were entirely offset by a loss of 9,500 seats due to an international carrier discontinuing service from Haneda to Honolulu. Additionally, there was reduced service from another international carrier and from a domestic carrier, resulting in a loss of 5,000 seats combined.
- Scheduled air seats from Canada increased in July (+1.9%) compared to a year ago, with more seats being added from Vancouver.
- Scheduled air seats from Oceania rose in July (+8.3%) compared to last year, boosted by the addition of more seats from Auckland, New Zealand (+46.8%). Combined seats from Brisbane, Melbourne and Sydney, Australia declined (-4.6%) versus a year ago.
- Scheduled air seats from Other Asia markets decreased in July (-8.3%) year-over-year. Seat capacity from Seoul dropped (-15.4%), largely due to a halt in service from a low-cost carrier until mid-July 2018. There were more seats from Beijing and Shanghai (+7.6%) but no growth in seats from Taiwan (-0.3%).
- Through the first seven months, air seat capacity statewide increased (+9.6% to 7,826,729 seats) compared to the same period last year. Seats increased to Līhu'e (+38.9%), Kona (+36.2%), Hilo (+34.7%), Kahului (+12.9%) and Honolulu (+2.5%).

Cruise Ship Visitors:

- The months of June through August are a typically slower period for out-of-state cruise ships coming to Hawai'i. In July, one cruise ship came with 752 visitors, compared to two cruise ships that carried 3,641 visitors last year.
- Arrivals by air service to board cruise ships dropped 23.9 percent in July. There were four Saturdays and four tours of the Hawai'i home-ported cruise ship in July compared to five Saturdays and five tours last July. Total cruise visitors declined in July (-36.1% to 10,566) compared to a year ago.

- Year-to-date through July, there were 66,755 visitors who entered Hawai'i aboard 38 out-of-state cruise ships in comparison to 42 cruise ships with 73,724 visitors in the same period last year. Total cruise visitors (arrivals by cruise ships and by air to board cruise ships) decreased through the first seven months (-5% to 140,805) versus the same timeframe last year.

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Tables of visitor characteristic and expenditure statistics including data presented in the news release; detailed monthly visitor characteristics data tables by visitor market and by island; fact sheets with visitor statistics and economic data for the State of Hawai'i and selected visitor markets; have been posted on the Hawai'i Tourism Authority website:

<https://www.hawaii tourism authority.org/research/monthly-visitor-statistics/>

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 2018 ARRIVALS AT A GLANCE

CATEGORY AND MMA	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES (\$mil.)	1,662.7	1,586.4	4.8	10,924.2	9,946.8	9.8
Total by air	1,662.6	1,585.5	4.9	10,901.4	9,924.6	9.8
U.S. West	636.2	598.8	6.2	4,019.6	3,660.2	9.8
U.S. East	454.3	452.5	0.4	2,910.1	2,664.0	9.2
Japan	206.4	192.5	7.2	1,343.1	1,253.4	7.2
Canada	55.3	46.6	18.8	705.3	655.2	7.6
All Others	310.4	295.2	5.1	1,923.3	1,691.7	13.7
Visitor arrivals by cruise ships	0.2	0.9	-82.1	22.7	22.3	2.2
TOTAL VISITOR DAYS	8,521,381	8,094,248	5.3	53,306,253	49,870,692	6.9
Total by air	8,517,312	8,083,202	5.4	53,031,531	49,543,707	7.0
U.S. West	3,804,541	3,555,789	7.0	22,445,580	20,558,403	9.2
U.S. East	2,199,197	2,104,961	4.5	13,579,388	12,787,746	6.2
Japan	844,231	829,906	1.7	5,258,237	5,170,732	1.7
Canada	345,070	314,754	9.6	4,162,010	4,011,432	3.8
All Others	1,324,272	1,277,792	3.6	7,586,316	7,015,394	8.1
Visitor arrivals by cruise ships	4,069	11,045	-63.2	274,722	326,984	-16.0
VISITOR ARRIVALS	939,360	891,878	5.3	5,922,203	5,496,854	7.7
Total by air	938,608	888,236	5.7	5,855,448	5,423,129	8.0
U.S. West	420,204	385,235	9.1	2,485,758	2,241,484	10.9
U.S. East	222,694	208,530	6.8	1,353,477	1,252,499	8.1
Japan	138,060	136,300	1.3	884,644	873,928	1.2
Canada	27,527	26,691	3.1	332,665	315,502	5.4
All Others	130,122	131,482	-1.0	798,904	739,715	8.0
Visitor arrivals by cruise ships	752	3,641	-79.3	66,755	73,724	-9.5
AVERAGE LENGTH OF STAY	9.07	9.08	0.0	9.00	9.07	-0.8
Total by air	9.07	9.10	-0.3	9.06	9.14	-0.9
U.S. West	9.05	9.23	-1.9	9.03	9.17	-1.5
U.S. East	9.88	10.09	-2.2	10.03	10.21	-1.7
Japan	6.11	6.09	0.4	5.94	5.92	0.5
Canada	12.54	11.79	6.3	12.51	12.71	-1.6
All Others	10.18	9.72	4.7	9.50	9.48	0.1
Visitor arrivals by cruise ships	5.41	3.03	78.4	4.12	4.44	-7.2
PER PERSON PER DAY SPENDING (\$)	195.1	196.0	-0.4	204.9	199.5	2.7
Total by air	195.2	196.1	-0.5	205.6	200.3	2.6
U.S. West	167.2	168.4	-0.7	179.1	178.0	0.6
U.S. East	206.6	215.0	-3.9	214.3	208.3	2.9
Japan	244.4	231.9	5.4	255.4	242.4	5.4
Canada	160.2	147.9	8.3	169.5	163.3	3.7
All Others	234.4	231.1	1.5	253.5	241.1	5.1
Visitor arrivals by cruise ships	39.0	80.2	-51.3	82.8	68.1	21.6
PER PERSON PER TRIP SPENDING (\$)	1,770.0	1,778.7	-0.5	1,844.6	1,809.5	1.9
Total by air	1,771.3	1,785.0	-0.8	1,861.8	1,830.0	1.7
U.S. West	1,514.0	1,554.3	-2.6	1,617.1	1,632.9	-1.0
U.S. East	2,039.9	2,169.8	-6.0	2,150.1	2,127.0	1.1
Japan	1,494.7	1,412.1	5.9	1,518.3	1,434.3	5.9
Canada	2,008.8	1,744.3	15.2	2,120.2	2,076.8	2.1
All Others	2,385.7	2,245.5	6.2	2,407.4	2,286.9	5.3
Visitor arrivals by cruise ships	211.2	243.4	-13.2	340.7	301.9	12.9

P=Preliminary data.

Source:Haw aii Tourism Authority

JULY 2018 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2018P	2017P	% change	YTD 2018P	YTD 2017P	% change
TOTAL EXPENDITURES (\$mil.)	1,662.7	1,586.4	4.8	10,924.2	9,946.8	9.8
Total by air	1,662.6	1,585.5	4.9	10,901.4	9,924.6	9.8
O'ahu	773.7	764.4	1.2	4,851.0	4,452.1	9.0
Maui	481.5	432.5	11.3	3,189.5	2,845.6	12.1
Moloka'i	2.9	1.4	109.5	22.1	21.1	4.8
Lāna'i	8.6	5.1	67.9	66.1	47.9	38.1
Kaua'i	194.6	165.5	17.6	1,236.8	1,119.6	10.5
Haw ai'i Island	201.1	216.7	-7.2	1,535.9	1,438.3	6.8
Visitor arrivals by cruise ships	0.2	0.9	-82.1	22.7	22.3	2.2
TOTAL VISITOR DAYS	8,521,381	8,094,248	5.3	53,306,253	49,870,692	6.9
Total by air	8,517,312	8,083,202	5.4	53,031,531	49,543,707	7.0
O'ahu	3,995,607	3,795,351	5.3	23,990,067	22,562,129	6.3
Maui	2,322,796	2,042,532	13.7	14,283,941	13,188,588	8.3
Moloka'i	24,620	17,560	40.2	173,047	166,561	3.9
Lāna'i	21,685	18,954	14.4	158,910	126,756	25.4
Kaua'i	1,013,258	964,510	5.1	6,319,854	5,761,550	9.7
Haw ai'i Island	1,139,345	1,244,296	-8.4	8,105,712	7,738,123	4.8
Visitor arrivals by cruise ships	4,069	11,045	-63.2	274,722	326,984	-16.0
VISITOR ARRIVALS	939,360	891,878	5.3	5,922,203	5,496,854	7.7
Total by air	938,608	888,236	5.7	5,855,448	5,423,129	8.0
O'ahu	566,059	554,972	2.0	3,480,379	3,297,624	5.5
Maui	295,110	261,964	12.7	1,758,623	1,622,565	8.4
Moloka'i	5,644	4,268	32.2	36,160	33,018	9.5
Lāna'i	6,251	5,249	19.1	45,420	37,309	21.7
Kaua'i	137,641	128,259	7.3	836,016	754,668	10.8
Haw ai'i Island	153,906	176,230	-12.7	1,084,324	1,044,376	3.8
Visitor arrivals by cruise ships	752	3,641	-79.3	66,755	73,724	-9.5
AVERAGE LENGTH OF STAY	9.07	9.08	0.0	9.00	9.07	-0.8
Total by air	9.07	9.10	-0.3	9.06	9.14	-0.9
O'ahu	7.06	6.84	3.2	6.89	6.84	0.7
Maui	7.87	7.80	0.9	8.12	8.13	-0.1
Moloka'i	4.36	4.11	6.0	4.79	5.04	-5.1
Lāna'i	3.47	3.61	-3.9	3.50	3.40	3.0
Kaua'i	7.36	7.52	-2.1	7.56	7.63	-1.0
Haw ai'i Island	7.40	7.06	4.8	7.48	7.41	0.9
Visitor arrivals by cruise ships	5.41	3.03	78.4	4.12	4.44	-7.2
PER PERSON PER DAY SPENDING (\$)	195.1	196.0	-0.4	204.9	199.5	2.7
Total by air	195.2	196.1	-0.5	205.6	200.3	2.6
O'ahu	193.6	201.4	-3.8	202.2	197.3	2.5
Maui	207.3	211.7	-2.1	223.3	215.8	3.5
Moloka'i	119.3	79.8	49.4	127.5	126.4	0.9
Lāna'i	396.4	270.1	46.7	416.3	377.9	10.2
Kaua'i	192.1	171.6	12.0	195.7	194.3	0.7
Haw ai'i Island	177	174.1	1.4	189.5	185.9	1.9
Visitor arrivals by cruise ships	39.0	80.2	-51.3	82.8	68.1	21.6
PER PERSON PER TRIP SPENDING (\$)	1,770.0	1,778.7	-0.5	1,844.6	1,809.5	1.9
Total by air	1,771.3	1,785.0	-0.8	1,861.8	1,830.0	1.7
O'ahu	1,366.9	1,377.3	-0.8	1,393.8	1,350.1	3.2
Maui	1,631.7	1,650.8	-1.2	1,813.6	1,753.7	3.4
Moloka'i	520.3	328.5	58.4	610.3	637.6	-4.3
Lāna'i	1,375.1	975.4	41.0	1,456.4	1,283.8	13.4
Kaua'i	1,414.1	1,290.2	9.6	1,479.5	1,483.6	-0.3
Haw ai'i Island	1,306.7	1,229.4	6.3	1,416.5	1,377.2	2.9
Visitor arrivals by cruise ships	211.2	243.4	-13.2	340.7	301.9	12.9

P=Preliminary data.

Source: Haw ai'i Tourism Authority