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## Hawai'i Visitor Statistics Released for November 2018

**HONOLULU** – Visitors to the Hawaiian Islands spent a total of \$1.29 billion in November 2018, which was nearly flat (-0.3%) compared to November 2017, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA).

In November, growth in visitor spending from the U.S. West (+6.5% to \$533.1 million), U.S. East (+9.3% to \$292.3 million) and Canada (+2.6% to \$99.6 million) markets was offset by decreases from Japan (-0.4% to \$182.7 million) and All Other International Markets (-26.5% to \$175.3 million).

On a statewide level, average daily visitor spending was down (-3.2% to \$193 per person) in November year-over-year. Visitors from U.S. East (+4.0%) and Canada (+2.2%) spent more per day, while visitors from Japan (-3.8%) and All Other International Markets (-12.1%) spent less.

Total visitor arrivals rose to 781,990 (+4.3%) in November compared to a year ago, with growth realized in arrivals from both air service (+4.1% to 770,126) and cruise ships (+21.1% to 11,864). Total visitor days<sup>1</sup> increased by 3.0 percent. The average daily census<sup>2</sup> (i.e. number of visitors on any given day) in November was 221,935 (+3.0%).

More visitors came by air from U.S. West (+11.3%), U.S. East (+7.5%), Japan (+3.1%) and Canada (+0.7%) in November, while fewer visitors came from All Other International Markets (-19.7%) versus last year.

O'ahu, Maui and Kaua'i all recorded increases in both visitor spending and visitor arrivals in November year-over-year. Visitor spending on O'ahu grew slightly to \$609.1 million (+0.9%) with visitor arrivals increasing to 456,121 (+2.8%). Maui saw visitor spending grow to \$364.6 million (+1.7%) and visitor arrivals to 225,178 (+4.1%). Visitor spending on Kaua'i increased to \$141.7 million (+13.9%) and visitor arrivals to 102,516 (+6.4%). The island of Hawai'i recorded declines in both visitor spending of \$154.4 million (-18.3%) and visitor arrivals of 123,032 (-10.0%).

A total of 1,035,694 trans-Pacific air seats served the Hawaiian Islands in November, up 7.3 percent year-over-year. Growth in scheduled air seats from Canada (+15.8%), U.S. West (+10.8%), Japan (+10.7%), Oceania (+2.7%) and U.S. East (+0.4%) offset fewer air seats from Other Asia markets (-37.9%).

### Year-to-Date 2018

Year-to-date through the first 11 months of 2018, visitors to the Hawaiian Islands spent a total of \$16.22 billion, an increase of 8.0 percent compared to the same period last year.

Hawai'i's four largest visitor markets, U.S. West (+9.9% to \$6.01 billion), U.S. East (+9.0% to \$4.13 billion), Japan (+1.9% to \$2.12 billion) and Canada (+6.6% to \$960.7 million), all reported growth in visitor spending compared to the same period last year. Combined visitor spending from All Other International Markets also increased (+8.0% to \$2.95 billion).

<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.

Year-to-date through November, total visitor arrivals increased (+6.1% to 9,044,488) versus last year, with growth from U.S. West (+9.7% to 3,822,064), U.S. East (+8.3% to 1,956,288), Canada (+3.4% to 465,497) and All Other International Markets (+3.5% to 1,249,624) offsetting fewer visitors from Japan (-1.5% to 1,440,289).

All four larger Hawaiian Islands realized growth in visitor spending over the first 11 months of 2018. Visitor arrivals increased on O'ahu, Maui and Kaua'i but declined slightly on the island of Hawai'i.

A total of 12,066,873 trans-Pacific air seats served the Hawaiian Islands year-to-date through November, up 8.8 percent from the same period last year.

### Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Pacific (+11.9%) and Mountain (+8.4%) regions in November compared to last year, with growth realized from Alaska (+22.5%), Nevada (+14.0%), Washington (+13.0%), Colorado (+12.0%), California (+11.8%) and Arizona (+11.5%). Through the first 11 months of 2018, arrivals rose from the Mountain (+12.4%) and Pacific (+9.3%) regions versus the same period last year.
- **U.S. East:** With the exception of New England (-4.4%), all regions recorded growth in visitor arrivals in November versus a year ago. Year-to-date, arrivals were up from every region, including growth from the two largest regions, East North Central (+9.5%) and South Atlantic (+9.1%).
- **Japan:** More visitors stayed in hotels (+2.7%) in November while stays in timeshares (-2.2%) were down compared to last year. Additionally, more visitors made their own travel arrangements (+21.9%) while fewer visitors purchased group tours (-14.6%) and package trips (-6.5%).
- **Canada:** Visitor arrivals on international flights increased (+8.6%), while fewer visitors came on U.S. domestic flights (-26.7%), in November year-over-year. Flying directly from Canada to Hawai'i was more affordable than crossing from Canada into the U.S. to take domestic flights. Visitor stays declined in hotels (-4.1%) and condominiums (-5.2%) but increased in rental homes (+43.8%) in November compared to a year ago.
- **MCI:** Total visitor arrivals who came in November for meetings, conventions and incentives (MCI) decreased (-8.6% to 36,014) from last year. Fewer arrivals attended conventions (-27.5%) and corporate meetings (-4.2%) but more arrivals came for incentive trips (+23.7%). Year-to-date, total MCI visitors increased (+2.0% to 462,444) versus the same period last year.

### Highlights from All Other Markets:

- **Australia:** There were 23,941 visitors in November, down 4.6 percent from a year ago. Arrivals year-to-date through the first 11 months of 2018 (+0.5% to 296,323 visitors) were comparable to last year.
- **New Zealand:** Supported by an increase in air service, visitor arrivals rose in both November (+10.9% to 5,950) and year-to-date (+20.3% to 77,821) from last year.
- **China:** Visitor arrivals declined in both November (-11.9% to 6,506) and through the first 11 months (-9.5% to 128,485) compared to last year.

- **Korea:** Visitor arrivals decreased in both November (-42.2% to 15,512) and year-to-date (-9.1% to 211,463) compared to a year ago.
- **Taiwan:** Visitor arrivals declined in both November (-16.8% to 1,221) and through the first 11 months (-7.7% to 15,925) versus last year.
- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland increased in both November (+6.1% to 9,301) and through the first 11 months (+3.5% to 133,648) compared to a year ago.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina declined in November (-3.9% to 1,249) but rose over the first 11 months (+8.2% to 23,410) versus last year.

### Island Highlights:

- **O'ahu:** In November, visitor spending rose slightly (+0.9% to \$609.1 million) year-over-year, as growth in visitor days (+5.1%) offset lower daily spending (-4.0% to \$201 per person). Visitor arrivals were up (+2.8% to 456,121), with growth realized from U.S. West (+16.3%), U.S. East (+9.1%), Canada (+5.9%) and Japan (+3.1%). The average daily census rose 5.1 percent to 101,214 visitors in November. Through the first 11 months of 2018, both visitor spending (+7.8% to \$7.42 billion) and visitor arrivals (+4.4% to 5,402,507) increased compared to last year.
- **Maui:** In November, visitor spending rose to \$364.6 million (+1.7%) versus a year ago. While visitor days increased (+5.0%), daily spending (-3.1% to \$198 per person) was lower compared to last year. Visitor arrivals increased (+4.1% to 225,178), with growth from U.S. West (+6.2%) and U.S. East (+6.2%) offsetting declines from Japan (-1.4%) and Canada (-0.9%). The average daily census increased 5.0 percent to 61,378 visitors in November. Through the first 11 months, both visitor spending (+10.1% to \$4.62 billion) and visitor arrivals (+6.9% to 2,658,827) grew from last year.
- **Island of Hawai'i:** In November, visitor spending declined (-18.3% to \$154.4 million) due to a decrease in visitor days (-8.0%) and lower daily spending (-11.2% to \$165 per person) versus last year. Visitor arrivals were down (-10.0% to 123,032), with more visitors from U.S. West (+4%) but fewer visitors from Japan (-26.1%), U.S. East (-13.8%) and Canada (-12.2%). Fewer visitors took day trips (-37.7%) compared to a year ago. The average daily census decreased 8.0 percent to 31,106 visitors in November. Through the first 11 months, visitor spending increased (+1.6% to \$2.17 billion) but visitor arrivals declined (-1.7% to 1,559,779) compared to last year.
- **Kaua'i:** In November, visitor spending increased (+13.9% to \$141.7 million) boosted by growth in visitor days (+4.1%) and higher daily spending (+9.4% to \$189 per person) compared to last year. Visitor arrivals increased (+6.4% to 102,516), with more visitors from U.S. West (+14.7%) and U.S. East (+1.6%) offsetting fewer visitors from Japan (-29.0%) and Canada (-7.2%). The average daily census rose 4.1 percent to 24,991 visitors in November. Through the first 11 months, both visitor spending (+11.6% to \$1.84 billion) and visitor arrivals (+8.2% to 1,258,904) increased year-over-year.

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

Total trans-Pacific air seats serving the Hawaiian Islands increased 7.3 percent to 1,035,694 seats in November, supported by growth in both scheduled air seats (+7.0% to 1,024,989) and charter seats (+43.3% to 10,705). There were more air seats serving Līhu'e (+37.8%), Kona (+24.0%), Kahului (+9.1%) and Honolulu (+2.0%) but fewer seats to Hilo (-2.9%) compared to a year ago.

- Scheduled air seats from the U.S. West market rose 10.8 percent in November, boosted by the addition of daily service from Long Beach (+5,600 seats, started June 2018), a doubling of air seat capacity from Denver (+112.9%), and increased service from Anchorage (+62.9%), San Diego (+38.3%), Portland (+25.7%), Seattle (+14.7%), San Francisco (+13.8%) and San Jose (+11.2%). These increases offset fewer air seats from Los Angeles (-3.3%).
- The number of scheduled air seats from the U.S. East market (+0.4%) in November was comparable to last year. Growth in air seats from Dallas (+16.8%) and New York City's John F. Kennedy International Airport (+11.1%) offset fewer seats from Minneapolis (-57.4%).
- Scheduled air seats from Japan increased (+10.7%) in November compared to last year with more seats from Osaka (+58.3%), Sapporo (+7.3%) and Tokyo International Airport (Haneda) (+4.0%) offsetting fewer seats from Fukuoka (-4.5%), Nagoya (-1.9%) and Tokyo's Narita International Airport (-1.5%).
- Scheduled air seats from Canada rose in November (+15.8%) compared to a year ago, with seats more than doubling from Calgary (+153.7%) along with increased service from Vancouver (+8.7%).
- Scheduled air seats from Oceania were up in November (+2.7%) compared to last year, boosted by increased service from Auckland, New Zealand (+12.7%). Combined air seats from Brisbane, Melbourne and Sydney in Australia (-0.1%) were virtually unchanged from November 2017.
- Scheduled air seats from Other Asia markets declined in November (-37.9%) year-over-year. There was a decrease in air seat capacity from Seoul, South Korea (-44.3%) as two international carriers reduced air service to Hawai'i (-9,700 seats combined). Additionally, a low-cost carrier suspended service from late October 2018 to the last week of December 2018 (-8,600 seats).

While Shanghai, China, saw an increase in air seats (+21.3%) in November compared to last year, fewer seats arrived from Beijing (-20.9%) as a carrier discontinued service on the Peking-Honolulu route. Air seat capacity from Taiwan (-11.1%) also declined in November from last year.

Through the first 11 months of 2018, trans-Pacific air seat capacity statewide rose (+8.8% to 12,066,873 seats) compared to the same period last year. Air seats increased to Līhu'e (+33.6%), Kona (+33.0%), Hilo (+15.2%), Kahului (+13.3%) and Honolulu (+2.3%).

### **Cruise Ship Visitors:**

- In November, six out-of-state cruise ships brought 11,864 visitors to Hawai'i compared to the six ships that carried 9,794 visitors a year ago. Total cruise visitors (arrivals by cruise ships and by air to board cruise ships) increased (+8.9% to 20,257) compared to last year.
- Through the first 11 months of 2018, 110,725 visitors entered Hawai'i aboard 59 out-of-state cruise ships in comparison to 115,089 visitors on 62 cruise ships over the same period last year.

Year-to-date, total cruise visitor arrivals (arrivals by cruise ships and by air to board cruise ships) decreased (-3.9% to 223,066) versus the same timeframe last year.

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Tables of preliminary 2018 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](http://www.hawaii tourism authority.org). Follow updates about HTA on [Facebook](#), [Instagram](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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## NOVEMBER 2018 ARRIVALS AT A GLANCE

TOTAL EXPENDITURES (\$mil.)	2018P	2017	% change	2018P YTD	2017 YTD	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,287.0</b>	<b>1,290.4</b>	<b>-0.3</b>	<b>16,218.7</b>	<b>15,020.2</b>	<b>8.0</b>
Total by air	1,283.0	1,287.4	-0.3	16,178.8	14,978.3	8.0
U.S. West	533.1	500.8	6.5	6,007.6	5,467.3	9.9
U.S. East	292.3	267.4	9.3	4,134.4	3,791.6	9.0
Japan	182.7	183.5	-0.4	2,124.5	2,085.3	1.9
Canada	99.6	97.1	2.6	960.7	901.1	6.6
All Others	175.3	238.6	-26.5	2,951.5	2,733.1	8.0
Visitor arrivals by cruise ships	4.0	3.0	30.3	39.9	41.8	-4.6
<b>TOTAL VISITOR DAYS</b>	<b>6,658,063</b>	<b>6,463,001</b>	<b>3.0</b>	<b>80,101,873</b>	<b>75,757,411</b>	<b>5.7</b>
Total by air	6,603,455	6,420,221	2.9	79,622,549	75,253,801	5.8
U.S. West	3,091,820	2,848,483	8.5	33,987,068	31,437,305	8.1
U.S. East	1,341,585	1,276,311	5.1	19,372,093	18,142,301	6.8
Japan	757,455	731,462	3.6	8,583,844	8,690,548	-1.2
Canada	628,819	626,213	0.4	5,699,884	5,568,720	2.4
All Others	783,776	937,753	-16.4	11,979,660	11,414,926	4.9
Visitor arrivals by cruise ships	54,607	42,779	27.6	479,324	503,610	-4.8
<b>VISITOR ARRIVALS</b>	<b>781,990</b>	<b>749,466</b>	<b>4.3</b>	<b>9,044,488</b>	<b>8,524,602</b>	<b>6.1</b>
Total by air	770,126	739,672	4.1	8,933,763	8,409,513	6.2
U.S. West	358,555	322,207	11.3	3,822,064	3,482,789	9.7
U.S. East	142,682	132,685	7.5	1,956,288	1,806,430	8.3
Japan	133,521	129,505	3.1	1,440,289	1,462,690	-1.5
Canada	52,757	52,398	0.7	465,497	450,154	3.4
All Others	82,611	102,878	-19.7	1,249,624	1,207,450	3.5
Visitor arrivals by cruise ships	11,864	9,794	21.1	110,725	115,089	-3.8
<b>AVERAGE LENGTH OF STAY</b>	<b>8.51</b>	<b>8.62</b>	<b>-1.3</b>	<b>8.86</b>	<b>8.89</b>	<b>-0.3</b>
Total by air	8.57	8.68	-1.2	8.91	8.95	-0.4
U.S. West	8.62	8.84	-2.5	8.89	9.03	-1.5
U.S. East	9.40	9.62	-2.3	9.90	10.04	-1.4
Japan	5.67	5.65	0.4	5.96	5.94	0.3
Canada	11.92	11.95	-0.3	12.24	12.37	-1.0
All Others	9.49	9.12	4.1	9.59	9.45	1.4
Visitor arrivals by cruise ships	4.60	4.37	5.4	4.33	4.38	-1.1
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>193.3</b>	<b>199.7</b>	<b>-3.2</b>	<b>202.5</b>	<b>198.3</b>	<b>2.1</b>
Total by air	194.3	200.5	-3.1	203.2	199.0	2.1
U.S. West	172.4	175.8	-1.9	176.8	173.9	1.6
U.S. East	217.8	209.5	4.0	213.4	209.0	2.1
Japan	241.2	250.8	-3.8	247.5	240.0	3.1
Canada	158.4	155.0	2.2	168.5	161.8	4.2
All Others	223.7	254.4	-12.1	246.4	239.4	2.9
Visitor arrivals by cruise ships	72.7	71.2	2.1	83.3	83.1	0.3
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,645.8</b>	<b>1,721.8</b>	<b>-4.4</b>	<b>1,793.2</b>	<b>1,762.0</b>	<b>1.8</b>
Total by air	1,666.0	1,740.4	-4.3	1,811.0	1,781.1	1.7
U.S. West	1,486.8	1,554.2	-4.3	1,571.8	1,569.8	0.1
U.S. East	2,048.3	2,015.6	1.6	2,113.4	2,098.9	0.7
Japan	1,368.4	1,416.6	-3.4	1,475.1	1,425.7	3.5
Canada	1,888.4	1,852.9	1.9	2,063.8	2,001.8	3.1
All Others	2,122.3	2,319.3	-8.5	2,361.9	2,263.5	4.3
Visitor arrivals by cruise ships	334.4	310.9	7.6	360.6	363.6	-0.8

P=Preliminary data.

Source:Hawaii Tourism Authority

## NOVEMBER 2018 ISLAND HIGHLIGHTS

TOTAL EXPENDITURES (\$mil.)	2018P	2017	% change	2018P YTD	2017 YTD	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,287.0</b>	<b>1,290.4</b>	<b>-0.3</b>	<b>16,218.7</b>	<b>15,020.2</b>	<b>8.0</b>
Total by air	1,283.0	1,287.4	-0.3	16,178.8	14,978.3	8.0
O'ahu	609.1	603.7	0.9	7,420.8	6,885.9	7.8
Maui	364.6	358.6	1.7	4,621.0	4,198.1	10.1
Moloka'i	4.3	2.3	87.8	37.28	28.9	29.2
Lāna'i	9.0	9.4	-4.5	98.6	89.0	10.8
Kaua'i	141.7	124.4	13.9	1,835.1	1,643.7	11.6
Haw ai'i Island	154.4	189.0	-18.3	2,166.0	2,132.9	1.6
Visitor arrivals by cruise ships	4.0	3.0	30.3	39.9	41.8	-4.6
<b>TOTAL VISITOR DAYS</b>	<b>6,658,063</b>	<b>6,463,001</b>	<b>3.0</b>	<b>80,101,873</b>	<b>75,757,411</b>	<b>5.7</b>
Total by air	6,603,455	6,420,221	2.9	79,622,549	75,253,801	5.8
O'ahu	3,036,428	2,888,368	5.1	36,916,737	34,741,206	6.3
Maui	1,841,349	1,754,354	5.0	21,295,693	19,846,021	7.3
Moloka'i	23,296	23,854	-2.3	256,581	246,856	3.9
Lāna'i	19,453	18,844	3.2	230,133	189,393	21.5
Kaua'i	749,740	720,443	4.1	9,328,921	8,704,311	7.2
Haw ai'i Island	933,190	1,014,358	-8.0	11,594,484	11,526,014	0.6
Visitor arrivals by cruise ships	54,607	42,779	27.6	479,324	503,610	-4.8
<b>VISITOR ARRIVALS</b>	<b>781,990</b>	<b>749,466</b>	<b>4.3</b>	<b>9,044,488</b>	<b>8,524,602</b>	<b>6.1</b>
Total by air	770,126	739,672	4.1	8,933,763	8,409,513	6.2
O'ahu	456,121	443,726	2.8	5,402,507	5,174,334	4.4
Maui	225,178	216,264	4.1	2,658,827	2,486,549	6.9
Moloka'i	4,639	4,621	0.4	54,130	52,431	3.2
Lāna'i	5,984	4,917	21.7	67,892	57,749	17.6
Kaua'i	102,516	96,345	6.4	1,258,904	1,163,177	8.2
Haw ai'i Island	123,032	136,626	-10.0	1,559,779	1,587,214	-1.7
Visitor arrivals by cruise ships	11,864	9,794	21.1	110,725	115,089	-3.8
<b>AVERAGE LENGTH OF STAY</b>	<b>8.51</b>	<b>8.62</b>	<b>-1.3</b>	<b>8.86</b>	<b>8.89</b>	<b>-0.3</b>
Total by air	8.57	8.68	-1.2	8.91	8.95	-0.4
O'ahu	6.66	6.51	2.3	6.83	6.71	1.8
Maui	8.18	8.11	0.8	8.01	7.98	0.4
Moloka'i	5.02	5.16	-2.7	4.74	4.71	0.7
Lāna'i	3.25	3.83	-15.2	3.39	3.28	3.4
Kaua'i	7.31	7.48	-2.2	7.41	7.48	-1.0
Haw ai'i Island	7.58	7.42	2.2	7.43	7.26	2.4
Visitor arrivals by cruise ships	4.60	4.37	5.4	4.33	4.38	-1.1
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>193.3</b>	<b>199.7</b>	<b>-3.2</b>	<b>202.5</b>	<b>198.3</b>	<b>2.1</b>
Total by air	194.3	200.5	-3.1	203.2	199.0	2.1
O'ahu	200.6	209.0	-4.0	201.0	198.2	1.4
Maui	198.0	204.4	-3.1	217.0	211.5	2.6
Moloka'i	184.5	96.0	92.3	145.3	116.9	24.3
Lāna'i	462.9	500.5	-7.5	428.6	469.9	-8.8
Kaua'i	188.9	172.7	9.4	196.7	188.8	4.2
Haw ai'i Island	165.4	186.3	-11.2	186.8	185.0	1.0
Visitor arrivals by cruise ships	72.7	71.2	2.1	83.3	83.1	0.3
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,645.8</b>	<b>1,721.8</b>	<b>-4.4</b>	<b>1,793.2</b>	<b>1,762.0</b>	<b>1.8</b>
Total by air	1,666.0	1,740.4	-4.3	1,811.0	1,781.1	1.7
O'ahu	1,335.4	1,360.5	-1.8	1,373.6	1,330.8	3.2
Maui	1,619.0	1,658.0	-2.4	1,738.0	1,688.3	2.9
Moloka'i	926.5	495.3	87.1	688.7	550.5	25.1
Lāna'i	1,504.8	1,918.1	-21.5	1,452.7	1,541.2	-5.7
Kaua'i	1,381.7	1,291.4	7.0	1,457.7	1,413.1	3.2
Haw ai'i Island	1,254.9	1,383.0	-9.3	1,388.7	1,343.8	3.3
Visitor arrivals by cruise ships	334.4	310.9	7.6	360.6	363.6	-0.8

P=Preliminary data.

Source:Haw ai'i Tourism Authority