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HTA Release (17-16)

Hawai'i Visitor Spending Rose 9 Percent in April 2017 **Four Largest Visitor Markets Reported Growth in Spending and Arrivals**

HONOLULU – Visitors spent a total of \$1.3 billion in the Hawaiian Islands in April 2017, an increase of 9 percent compared to a year ago, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA). Total visitor arrivals also grew 7.5 percent to 752,964 visitors. Hawai'i's four largest visitor markets, U.S. West, U.S. East, Japan and Canada, all realized growth in visitor spending and arrivals in April 2017 compared to a year ago.

From the U.S. West, visitor spending rose in April 2017 (+17% to \$490.4 million) boosted by an increase in arrivals (+9.4% to 321,877). Contributing to the increase in visitor arrivals was having the Easter holiday take place in April of this year versus March of last year. U.S. West visitors also spent more per day (+7.5% to \$176 per person) this April compared to last year.

From the U.S. East, visitor spending grew in April 2017 (+12.2% to \$298.6 million), spurred by an increase in arrivals (+10.7% to 147,532) and higher visitor spending (+1.2% to \$215 per person).

The Japan visitor market continued to produce positive results due to the launch of direct air service to Kona, increased air service to Honolulu, and the start of Golden Week, traditionally a period of growth for outbound Japan travel. Visitor spending rose in April 2017 (+4.6% to \$145.6 million), as did arrivals (+8.4% to 109,604). However, daily spending of \$222 per person was down slightly compared to April 2016 (\$227 per person).

The Canada market continued to recover from sharp decreases in visitor spending and visitor arrivals for most of last year. In April 2017, visitor spending (+21.5% to \$90.4 million) and arrivals (+17.9% to 48,952) showed substantial increases compared to a year ago.

Visitor spending from All Other International markets declined in April 2017 (-7.9% to \$220.9 million), as lower daily spending offset the increase in arrivals (+2.1% to 109,818).

Visitor spending and arrivals increased for all four larger Hawaiian Islands in April 2017 compared to the year prior. The island of Hawai'i, in particular, saw double-digit growth in visitor spending and arrivals, supported by increased direct air service from the U.S. and Japan.

The total number of air seats serving Hawai'i in April 2017 was similar (+0.4% to 978,406) to a year ago. Growth in scheduled seats from U.S. East (+14.5%), Japan (+8%) and Canada (+3%) balanced out declines from U.S. West (-1.5%), Other Asia (-10.9%) and Oceania (-13.3%).

Year-to-Date 2017

Visitor spending statewide rose through the first four months of 2017 (+10.1% to \$5.6 billion), bolstered by increases in visitor arrivals (+4.2% to 3,017,867) and daily spending (+5.6% to \$203 per person).

Year-to-date, Hawai'i's four largest visitor markets, U.S. West (+16.4% to \$2 billion), U.S. East (+10.3% to \$1.4 billion), Japan (+15.8% to \$708.6 million) and Canada (+9.1% to \$525.4 million), all reported strong growth in visitor spending compared to the year prior.

All four markets, U.S. West (+3.7% to 1,170,308), U.S. East (+6.4% to 665,420), Japan (+7.6% to 493,306) and Canada (+6.1% to 244,261), also realized growth in visitor arrivals compared to the same period last year.

Visitor spending from All Other International Markets declined (-4.6% to \$920.5 million) due to decreased arrivals (-4.9% to 388,426) and lower daily spending (-3.8% to \$245 per person) compared to the first four months of 2016.

Other Highlights:

- **U.S. West:** Visitor arrivals from the Pacific region rose in April 2017 (+8.9%) compared to a year ago. There were significantly more visitors from California, particularly from the Los Angeles (+22.3%), San Francisco (+7%) and Sacramento (+30.8%) metropolitan areas. A shift in the Easter holiday schedule to April of this year versus March of last year contributed to some of the growth in visitors from California. Arrivals from the Mountain region (+11%) also increased with more visitors coming from Nevada (+35.2%) and Utah (+20.8%). Through the first four months of 2017, arrivals increased from both the Pacific (+2.1%) and Mountain (+7.6%) regions.
- **U.S. East:** Growth in arrivals from the South Atlantic (+22.8%), Mid Atlantic (+18.3%), West North Central (+11%) and East North Central (+7.4%) regions offset fewer visitors from the New England (-3.1%) and West South Central (-2.5%) regions. In the first four months of 2017, arrivals increased from all U.S. East regions compared to the same period last year.
- **Japan:** Golden Week is a string of four holidays that occurs from April 29 through May 5 each year. The combination of holidays and weekends created a longer-than-normal vacation period that was favorable to long-haul destinations like Hawai'i. Visitors from Japan traveling to Hawai'i for Golden Week started arriving April 27. There were significantly more visitors from Japan who stayed in condominium properties (+45.2%) in April 2017 versus last year. Fewer visitors purchased group tours (-6.3%) while more made their own travel arrangements (+26.9%).
- **MCI:** The number of visitors who came for meetings, conventions and incentives (MCI) rose (+3.7% to 48,901) in April 2017. More visitors came to attend conventions (+28.3% to 20,474) but fewer came for corporate meetings (-11.6% to 8,950) or traveled on incentive trips (-6.9% to 21,462). Contributing to the growth in convention visitors was the International Society for Magnetic Resonance in Medicine 25th Annual Meeting, held at the Hawai'i Convention Center, which attracted close to 6,400 out-of-state delegates. For the first four months of 2017, growth in MCI visitors (-0.5% to 198,352) was flat compared to the same period last year.

Highlights from All Other Markets:

- **Australia:** Fewer available air seats contributed to a decrease in visitor arrivals in April 2017 (-11.3% to 26,934) and in the first four months of 2017 (-5.1% to 91,085).
- **New Zealand:** Visitor arrivals increased in April 2017 (+10.6% to 5,675) and year-to-date for 2017 (+10% to 14,446).
- **China:** Visitor arrivals rose in April 2017 (+5.5% to 13,781) but declined through the first four months of 2017 (-5.8% to 50,894) compared to last year.
- **Korea:** Visitor arrivals decreased in April 2017 (-9.9% to 16,222) and year-to-date (-3.4% to 78,049). The decline in April 2017 was partially caused by reduced seat capacity, as a carrier suspended service to Hawai'i until late May 2017 for maintenance.

- **Taiwan:** Visitor arrivals declined in April 2017 (-5.8% to 1,243), but continued to increase year-to-date (+2.6% to 6,054) compared to a year ago.
- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland decreased in April 2017 (-4.4% to 12,119) and year-to-date (-5.3% to 36,830) versus last year.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina increased in April 2017 (+15.5% to 2,246) but declined through the first four months of the year (-12.3% to 7,944).

Island Highlights:

- **O'ahu:** Visitor spending increased in April 2017 (+4.7% to \$547.1 million), driven by growth in visitor days¹ (+6.4%), which helped offset lower daily spending (\$189 per person) compared to last April (\$192 per person). Visitor arrivals were up (+7.1% to 437,436), with increases reported from Canada (+19.9%), U.S. East (+11.6%), Japan (+6.9%) and U.S. West (+6.2%). Year-to-date, both visitor spending (+8.3% to \$2.4 billion) and visitor arrivals (+3.6% to 1,769,001) exceeded the same period from 2016.
- **Maui:** Growth in visitor days (+8.6%) and higher daily spending (+2.4% to \$210 per person) contributed to a sizeable gain in visitor spending in April 2017 (+11.2% to \$371.2 million). Visitor arrivals rose (+7% to 226,511), with increases from Canada (+17.2%), U.S. West (+8%), U.S. East (+6.6) and Japan (+4.2%). Through April 2017, both visitor spending (+4.5% to \$1.7 billion) and arrivals (+2.6% to 886,859) surpassed year-to-date 2016.
- **Island of Hawai'i:** Visitor spending increased considerably in April 2017 (+19.4% to \$177.2 million), due to strong growth in visitor days (+19.9%). Daily spending of \$183 per person was similar to last April. Visitor arrivals also grew significantly (+17.1% to 137,459), supported by increased direct air service from the U.S. West and Japan. Arrivals rose from Japan (+29%), Canada (+27.5%), U.S. West (+17.1%) and U.S. East (+9.2%). The first four months of 2017 saw strong growth in visitor spending (+20.4% to \$857.4 million) and arrivals (+12.5% to 576,868) compared to a year ago.
- **Kaua'i:** Visitor spending rose substantially in April 2017 (+13.5% to \$140.6 million), bolstered by increased visitor days (+9.2%) and higher daily spending (+3.9% to \$191 per person). Visitor arrivals were up (+9.3% to 101,293), led by growth from U.S. East (+12.5%) and U.S. West (+8.4%). For the first four months of 2017, Kaua'i realized a strong increase in visitor spending (+18.7% to \$637.6 million) compared to the same period last year.

Air Seats to Hawai'i:

- The total number of air seats to Hawai'i in April 2017 was comparable (+0.4% to 978,406) to a year ago. Growth in scheduled seats was flat (+0.4% to 971,225), while charter seats dropped slightly (-0.9% to 7,181).
- Seat capacity to Kona rose in April 2017 (+11.9%) supported by the non-stop service from Haneda that began in December 2016, and additional service from Seattle. Seats to Kahului (+1.4%) and Hilo (+1.1%) also increased, but there were fewer seats to Honolulu (-1.2%) compared to a year ago.
- The number of scheduled seats from U.S. West declined in April 2017 (-1.5%). The increase in seats from Denver (+10.8%), Las Vegas (+5.8%), and Seattle (+3.8%) partially offset the reduced service from Bellingham and fewer seats from San Jose (-16.7%) and Phoenix (-9.3%).

¹ Aggregate number of days stayed by all visitors.

- Scheduled seats serving the U.S. East market rose in April 2017 (+14.5%) year-over-year. The Minneapolis-Honolulu route received an additional 8,204 seats in April 2017 and the increased seasonal service through August will add nearly 35,000 seats over the five-month period. Seats also increased from Dallas (+6.7%), Chicago (+4.2%) and Houston (+4.5%), offsetting fewer seats from Newark (-11.6%).
- Scheduled seats rose from Japan in April 2017 (+8%) compared to a year ago, with seats added to the Narita-Honolulu route (+15,109) and Haneda-Kona route (+3,822).
- Scheduled seats from Canada rose in April 2017 (+3%). There were more seats from Vancouver (+4.9%) and Calgary (+10.3%). These increases were partially offset by reduced service from Victoria and Edmonton.
- Scheduled seats from Oceania decreased in April 2017 (-13.3%) compared to a year ago, due to reduced service from Brisbane (-61.4%) and Melbourne (-18.8%). Partially offsetting this decline was a growth in seats from Auckland (+5.1%).
- Air seat capacity from Other Asia was down in April 2017 (-13.3%), driven by reduced seat capacity from Korea (-23%) due to a halt in service from one airline until late May 2017. There were more seats from Beijing (+25.4%), Shanghai (+3.4%) and Taiwan (+1.1%).
- Through the first four months of 2017, statewide air seat capacity decreased (-1.1% to 3,966,364) from the same time last year. There was growth in seats to Kona (+9.7%) and Hilo (+5%), but fewer seats to Lihū'e (-4.6%), Honolulu (-2.1%) and Kahului (-1%).

Cruise Ship Visitors:

- Eight cruise ships carrying 15,181 visitors to the islands arrived in April 2017 compared to 10 ships with 22,902 visitors in April 2016. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai'i home-ported cruise ship) declined (-12.8% to 29,780) in April 2017.
- Through the first four months of 2017, 32 out-of-state cruise ships brought 56,146 visitors to Hawai'i compared to 23 cruise ships that carried 45,608 visitors over the same period of a year ago. Total cruise visitors (by air and ship) increased year-to-date in 2017 (+27.2% to 98,273).

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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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April 2017 Arrivals at a Glance

CATEGORY AND MMA	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
TOTAL EXPENDITURES (\$mil.)	1,250.4	1,147.1	9.0	5,630.5	5,114.6	10.1
Total by air	1,245.8	1,138.7	9.4	5,613.7	5,097.5	10.1
U.S. West	490.4	419.2	17.0	2,025.6	1,739.5	16.4
U.S. East	298.6	266.1	12.2	1,433.6	1,300.0	10.3
Japan	145.6	139.1	4.6	708.6	611.9	15.8
Canada	90.4	74.4	21.5	525.4	481.4	9.1
All Others	220.9	239.9	-7.9	920.5	964.7	-4.6
Visitor arrivals by cruise ships	4.6	8.4	-45.3	16.8	17.1	-1.8
TOTAL VISITOR DAYS	6,478,220	5,987,057	8.2	27,810,076	26,684,957	4.2
Total by air	6,411,268	5,875,417	9.1	27,567,196	26,478,999	4.1
U.S. West	2,788,834	2,561,975	8.9	10,766,936	10,402,070	3.5
U.S. East	1,387,703	1,251,791	10.9	6,906,003	6,544,785	5.5
Japan	655,349	606,480	8.1	2,921,493	2,645,058	10.5
Canada	608,486	503,751	20.8	3,207,696	3,092,822	3.7
All Others	970,896	951,421	2.0	3,765,068	3,794,265	-0.8
Visitor arrivals by cruise ships	66,952	111,640	-40.0	242,880	205,958	17.9
VISITOR ARRIVALS	752,964	700,573	7.5	3,017,867	2,896,625	4.2
Total by air	737,783	677,671	8.9	2,961,721	2,851,017	3.9
U.S. West	321,877	294,264	9.4	1,170,308	1,128,254	3.7
U.S. East	147,532	133,262	10.7	665,420	625,331	6.4
Japan	109,604	101,087	8.4	493,306	458,621	7.6
Canada	48,952	41,527	17.9	244,261	230,223	6.1
All Others	109,818	107,531	2.1	388,426	408,588	-4.9
Visitor arrivals by cruise ships	15,181	22,902	-33.7	56,146	45,608	23.1
AVERAGE LENGTH OF STAY	8.60	8.55	0.7	9.22	9.21	0.0
Total by air	8.69	8.67	0.2	9.31	9.29	0.2
U.S. West	8.66	8.71	-0.5	9.20	9.22	-0.2
U.S. East	9.41	9.39	0.1	10.38	10.47	-0.8
Japan	5.98	6.00	-0.3	5.92	5.77	2.7
Canada	12.43	12.13	2.5	13.13	13.43	-2.2
All Others	8.84	8.85	-0.1	9.69	9.29	4.4
Visitor arrivals by cruise ships	4.41	4.87	-9.5	4.33	4.52	-4.2
PER PERSON PER DAY SPENDING (\$)	193.0	191.6	0.7	202.5	191.7	5.6
Total by air	194.3	193.8	0.3	203.6	192.5	5.8
U.S. West	175.8	163.6	7.5	188.1	167.2	12.5
U.S. East	215.1	212.6	1.2	207.6	198.6	4.5
Japan	222.1	229.4	-3.2	242.6	231.3	4.9
Canada	148.6	147.7	0.6	163.8	155.7	5.2
All Others	227.5	252.1	-9.8	244.5	254.3	-3.8
Visitor arrivals by cruise ships	68.9	75.5	-8.8	69.0	82.8	-16.7
PER PERSON PER TRIP SPENDING (\$)	1,660.7	1,637.4	1.4	1,865.7	1,765.7	5.7
Total by air	1,688.6	1,680.3	0.5	1,895.4	1,788.0	6.0
U.S. West	1,523.6	1,424.4	7.0	1,730.8	1,541.7	12.3
U.S. East	2,023.7	1,997.2	1.3	2,154.4	2,078.9	3.6
Japan	1,328.0	1,376.3	-3.5	1,436.5	1,334.2	7.7
Canada	1,846.6	1,791.4	3.1	2,150.9	2,091.1	2.9
All Others	2,011.5	2,230.6	-9.8	2,369.8	2,361.2	0.4
Visitor arrivals by cruise ships	303.7	368.1	-17.5	298.5	374.0	-20.2

P=Preliminary data.

Source:Haw a'i Tourism Authority

April 2017 Island Highlights

CATEGORY AND ISLAND	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
TOTAL EXPENDITURES (\$mil.)	1,250.4	1,147.1	9.0	5,630.5	5,114.6	10.1
Total by air	1,245.8	1,138.7	9.4	5,613.7	5,097.5	10.1
O'ahu	547.1	522.4	4.7	2,409.7	2,225.0	8.3
Maui	371.2	333.9	11.2	1,664.9	1,593.2	4.5
Moloka'i	2.3	1.9	19.0	14.8	10.5	41.3
Lāna'i	7.4	8.1	-9.4	29.3	20.5	43.3
Kaua'i	140.6	123.9	13.5	637.6	536.4	18.9
Haw aii Island	177.2	148.4	19.4	857.4	712.0	20.4
Visitor arrivals by cruise ships	4.6	8.4	-45.3	16.8	17.1	-1.8
TOTAL VISITOR DAYS	6,478,220	5,987,057	8.2	27,810,076	26,684,957	4.2
Total by air	6,411,268	5,875,417	9.1	27,567,196	26,478,999	4.1
O'ahu	2,900,729	2,726,999	6.4	12,256,960	11,769,991	4.1
Maui	1,769,384	1,629,970	8.6	7,525,670	7,420,387	1.4
Moloka'i	18,042	17,318	4.2	109,746	113,364	-3.2
Lāna'i	16,468	17,567	-6.3	69,534	69,767	-0.3
Kaua'i	736,819	674,835	9.2	3,128,703	3,016,939	3.7
Haw aii Island	969,827	808,729	19.9	4,476,583	4,088,552	9.5
Visitor arrivals by cruise ships	66,952	111,640	-40.0	242,880	205,958	17.9
VISITOR ARRIVALS	752,964	700,573	7.5	3,017,867	2,896,625	4.2
Total by air	737,783	677,671	8.9	2,961,721	2,851,017	3.9
O'ahu	437,436	408,319	7.1	1,769,001	1,707,731	3.6
Maui	226,511	211,613	7.0	886,859	864,292	2.6
Moloka'i	3,852	4,403	-12.5	19,579	21,679	-9.7
Lāna'i	5,508	6,040	-8.8	20,657	20,009	3.2
Kaua'i	101,293	92,668	9.3	397,398	373,025	6.5
Haw aii Island	137,459	117,430	17.1	576,868	512,704	12.5
Visitor arrivals by cruise ships	15,181	22,902	-33.7	56,146	45,608	23.1
AVERAGE LENGTH OF STAY	8.60	8.55	0.7	9.22	9.21	0.0
Total by air	8.69	8.67	0.2	9.31	9.29	0.2
O'ahu	6.63	6.68	-0.7	6.93	6.89	0.5
Maui	7.81	7.70	1.4	8.49	8.59	-1.2
Moloka'i	4.68	3.93	19.1	5.61	5.23	7.2
Lāna'i	2.99	2.91	2.8	3.37	3.49	-3.5
Kaua'i	7.27	7.28	-0.1	7.87	8.09	-2.7
Haw aii Island	7.06	6.89	2.4	7.76	7.97	-2.7
Visitor arrivals by cruise ships	4.41	4.87	-9.5	4.33	4.52	-4.2
PER PERSON PER DAY SPENDING (\$)	193.0	191.6	0.7	202.5	191.7	5.6
Total by air	194.3	193.8	0.3	203.6	192.5	5.8
O'ahu	188.6	191.6	-1.5	196.6	189.0	4.0
Maui	209.8	204.9	2.4	221.2	214.7	3.0
Moloka'i	128.2	112.2	14.2	135.1	92.6	45.9
Lāna'i	447.3	462.8	-3.3	421.4	293.2	43.8
Kaua'i	190.8	183.6	3.9	203.8	177.8	14.6
Haw aii Island	182.7	183.5	-0.4	191.5	174.1	10.0
Visitor arrivals by cruise ships	68.9	75.5	-8.8	69.0	82.8	-16.7
PER PERSON PER TRIP SPENDING (\$)	1,660.7	1,637.4	1.4	1,865.7	1,765.7	5.7
Total by air	1688.6	1680.3	0.5	1895.4	1788.0	6.0
O'ahu	1250.8	1279.4	-2.2	1362.2	1302.9	4.6
Maui	1638.8	1578.1	3.9	1877.3	1843.4	1.8
Moloka'i	600.5	441.5	36.0	757.1	484.0	56.4
Lāna'i	1337.6	1346.0	-0.6	1418.6	1022.2	38.8
Kaua'i	1387.8	1337.0	3.8	1604.4	1437.9	11.6
Haw aii Island	1289.1	1263.5	2.0	1486.2	1388.6	7.0
Visitor arrivals by cruise ships	303.7	368.1	-17.5	298.5	374.0	-20.2

P=Preliminary data.

Source:Haw aii Tourism Authority