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HTA Release (17-39)

## **Hawai'i Visitor Spending Grew 6.1 Percent in August 2017**

**HONOLULU** – Visitors to the Hawaiian Islands spent a total of \$1.39 billion in August 2017, an increase of 6.1 percent compared to August 2016, according to preliminary statistics released today by the Hawai'i Tourism Authority (HTA).

Total visitor arrivals rose 4.8 percent to 818,581 visitors in August 2017, marked by growth in arrivals from both air service (+4.8% to 815,949) and cruise ships (+39.8% to 2,632).

Hawai'i's four largest visitor markets, U.S. West, U.S. East, Japan and Canada, all reported increases in visitor spending and arrivals in August 2017.

The U.S. East market reported the largest gain in visitor spending in August 2017 (+11.7% to \$328.3 million) year-over-year. Daily spending (+5% to \$211 per person) was higher compared to a year ago and arrivals also grew (+6.6% 159,572) supported by increased air seats from Minneapolis, Dallas and Chicago.

The Japan market continued to realize growth in visitor spending (+9.4% to \$231.6 million), visitor arrivals (+5.2% to 160,424) and daily spending (+2% to \$224 per person) in August 2017, boosted by the additional direct flights serving Honolulu and Kona that began in prior months.

Spending by U.S. West visitors increased in August 2017 (+1.5% to \$489.9 million). Arrivals were up (+3.7% to 342,054), but a shorter length of stay (-3% to 8.51 days) resulted in marginal growth in visitor days (+0.6%). Daily spending (+0.9% to \$168 per person) rose slightly versus last year.

The Canada market recorded growth in visitor spending in August 2017 (+6.2% to \$51 million) compared to a year ago. Visitor arrivals increased (+6% to 29,542) but daily spending declined (-1.9% to \$156 per person) from a year ago.

Combined visitor spending from All Other International markets also increased in August 2017 (+5.7% to \$290.5 million), boosted by growth in arrivals (+4.6% to 124,358) and higher daily spending.

All four larger Hawaiian Islands saw growth in visitor spending and arrivals in August 2017 compared to last year.

Total air seats serving Hawai'i rose in August 2017 (+3.3% to 1,096,537) year-over-year. Double-digit growth was realized in scheduled air seats from Japan (+15.6%) and U.S. East (+13.9%), with seats from Other Asia (+0.9%) and the U.S. West (+0.4%) also rising slightly. These increases entirely offset the fewer seats that came from Oceania (-3.3%).

### Year-to-Date 2017

Total visitor spending increased through the first eight months of 2017 (+8.5% to \$11.34 billion), bolstered by growth in arrivals (+4.7% to 6,315,435) and daily spending (+3.9% to \$199 per person).

Year-to-date, U.S. West (+9.9% to \$4.15 billion), U.S. East (+12.8% to \$2.99 billion), Japan (+11.8% to \$1.49 billion) and Canada (+8.6% to \$706.2 million) have all reported growth in visitor spending compared to the same period last year.

Visitor spending from All Other International markets declined year-to-date (-1.8% to \$1.98 billion), due to decreased arrivals (-2.1% to 864,074) and lower daily spending (-2.5% to \$241 per person) compared to the first eight months of 2016.

### Other Highlights:

- **U.S. West:** Visitor arrivals increased from the Pacific (+4.3%) and Mountain (+1.2%) regions in August 2017 compared to a year ago, boosted by more visitors from Utah (+11.7%), Washington (+10.4%), Colorado (+6.1%), Oregon (+5.9%) and California (+3%). Through the first eight months of 2017, arrivals rose from both the Pacific (+3%) and Mountain (+5.8%) regions.
- **U.S. East:** Visitor arrivals increased from all regions in August 2017, led by growth from the South Atlantic (+9.8%), Mid Atlantic (+6.7%) and East North Central (+6.6%) regions. Year-to-date, arrivals were up from all regions compared to the first eight months of 2016.
- **Japan:** While there was marginal growth in hotel stays (+0.7%), considerably more visitors stayed in condominium (+24.3%) and timeshare (+18.5%) properties compared to August 2016. This was the fourth consecutive month of double-digit growth for both timeshare and condominium stays.
- **Canada:** Significantly more visitors stayed in timeshares (+35.4%) and rental homes (+18.8%) in August 2017, while there was moderate growth in condominium (+6.2%) and hotel (+1.1%) usage compared to August 2016.
- **MCI:** A total of 16,749 visitors came for meetings, conventions and incentives (MCI) in August 2017, a decline of 29.2 percent from last August. Fewer visitors came for conventions (-27.3% to 7,025) and traveled on incentives (-45.3% to 5,749). Year-to-date through August 2017, the number of MCI visitors increased (+3% to 344,839) compared to the same period last year.

### Highlights from All Other Markets:

- **Australia:** Visitor arrivals dropped slightly in August 2017 (-0.7% to 27,654) and also decreased year-to-date (-3.1% to 206,079) compared to a year ago.
- **New Zealand:** Visitor arrivals increased in both August 2017 (+3% to 7,201) and year-to-date (+7.2% to 43,085) versus last year.
- **China:** Arrivals declined for both August 2017 (-5.5% to 13,766) and year-to-date (-9.9% to 110,145) compared to the same periods in 2016.
- **Korea:** Visitor arrivals increased significantly in August 2017 (+15.5% to 20,783) year-over-year, and were slightly higher through the first eight months of 2017 (+0.9% to 155,499) when compared to 2016 levels.
- **Taiwan:** Visitor arrivals grew in both August 2017 (+5.1% to 1,722) and year-to-date (+0.7% to 12,897) compared to the same periods in 2016.

- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland declined in August 2017 (-4.3% to 18,523) and through the first eight months (-2.8% to 91,993) versus last year.
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina decreased in August 2017 (-2.6% to 1,754), and through the first eight months of 2017 (-7.3% to 16,363).

### Island Highlights:

- **O‘ahu:** Visitor spending increased in August 2017 (+8.6% to \$698.7 million), boosted by growth in visitor days<sup>1</sup> (+1.5%) and higher daily spending (+6.9% to \$201 per person) compared to a year ago. Arrivals were up (+3.9% to 517,206), with more visitors from U.S. East (+5.1%), U.S. West (+3.8%), Japan (+3.4%) and Canada (+3%). Year-to-date through August 2017, visitor spending (+7.2% to \$5.15 billion) and arrivals (+4% to 3,814,830) surpassed the results in 2016.
- **Maui:** Visitor spending rose in August 2017 (+4% to \$364.8 million) due to increases in visitor days (+1.7%) and daily spending (+2.3% to \$211 per person). Visitor arrivals rose (+2.5% to 233,266), highlighted by growth from Japan (+36.5%), Canada (+9.1%) and U.S. East (+7.4%). Through the first eight months of 2017, visitor spending (+5.2% to \$3.21 billion) and arrivals (+3.2% to 1,855,831) were higher compared to the same period last year.
- **Island of Hawai‘i:** Visitor spending gained in August 2017 (+7.1% to \$173.7 million). Visitor days (+12.8%) and arrivals (+14.2% to 152,550) were up significantly, supported by increased air service from the U.S. mainland and Japan. However, daily spending was lower (-5.1% to \$171 per person) compared to August 2016. Arrivals increased from Canada (+21.4%), U.S. East (+20.1%), Japan (+16.1%) and U.S. West (+4%) in August 2017. Year-to-date, double-digit growth was realized for both visitor spending (+18% to \$1.61 billion) and arrivals (+14% to 1,196,926) compared to the first eight months of 2016.
- **Kaua‘i:** Visitor spending increased in August 2017 (+4% to \$147.4 million), bolstered by growth in visitor days (+5.5%) which offset lower daily spending (-1.4% to \$187 per person). Arrivals rose (+6.7% to 111,904) compared to August 2016 with more visitors from Canada (+14.1%), U.S. West (+7.2%), U.S. East (+3.8%), and Japan (+3.2%) versus a year ago. Through the first eight months of 2017, there was strong growth in visitor spending (+12.5% to \$1.27 billion) compared to the same period last year.

### Air Seats to Hawai‘i:

- Total air seats to Hawai‘i increased in August 2017 (+3.3% to 1,096,537), with the growth in scheduled seats (+3.8% to 1,087,412) offsetting fewer charter seats (-36.2% to 9,125) compared to a year ago.
- Seat capacity to Hilo (+19.2%) rose sharply compared in August 2017 versus a year ago with additional service from Los Angeles. Seats to Kona (+9.4%) continued to show strong growth, boosted by the non-stop service introduced from Tokyo’s Haneda Airport in December 2016 and increased service from Denver and Dallas to Kona initiated in June 2017. Seats to Līhu‘e (+5.3%) and Honolulu (+3.2%) also increased, while seats to Kahului (-0.1%) were similar to last year.
- The total number of scheduled seats from U.S. West (+0.4%) in August 2017 was comparable to a year ago. The growth in seats from Denver (+22.2%), San Francisco (+7.3%) and Salt Lake

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

City (+6.9%) was offset by fewer seats from Oakland (-7.9%), San Diego (-6.8%), Phoenix (-5.6%), Portland (-2.2%) and Las Vegas (-2.1%).

- Scheduled seats serving the U.S. East market rose notably in August 2017 (+13.9%) year-over-year. The seasonal Minneapolis-Honolulu route produced an additional 4,689 seats in August 2017 and added nearly 35,000 seats in the five-month period between April and August 2017. Air service from Dallas (+24.9%) grew considerably in August 2017, with new flights to Kona adding 4,389 seats to the route, along with expanded service to Honolulu (+1,226 seats).
- Scheduled seats from Japan increased substantially (+15.6%) in August 2017 compared to a year ago, boosted by the seats added to the Narita-Honolulu route (+10,567 seats) and Haneda-Kona route (+3,614 seats). Furthermore, in late June 2017, a low-cost carrier launched service from Kuala Lumpur, Malaysia to Honolulu with a stop in Osaka (+6,400 seats).
- Scheduled seats from Canada (19,158) in August 2017 were unchanged from last year.
- Scheduled seats from Oceania decreased in August 2017 (-3.3%) year-over-year. Increased service from Sydney (+12.1%) was offset by fewer seats from Brisbane (-52.9%). Seats from Auckland rose slightly (+1%) compared to August 2016.
- Scheduled seats from Other Asia in August 2017 was slightly higher (+0.9%) than a year ago. There was growth in total seats from China (+8.5%), with additional seats from Shanghai offsetting fewer seats from Beijing. Seats from Taiwan were unchanged but seats from Seoul declined (-1.9%) compared to a year ago.
- Through the first eight months of 2017, statewide air capacity of 8,240,580 seats (+0.4%) was up slightly from the year prior. There was growth in seats to Kona (+10.9%), Hilo (+5.5%) and Līhu'e (+1.4%), but fewer seats to Kahului (-1%) and Honolulu (-0.4%).

### **Cruise Ship Visitors:**

- June through August is a typically slower period for out-of-state cruise ships coming to Hawai'i. In August 2017, one out-of-state cruise ship brought 2,632 visitors to the islands, compared to one ship with 1,883 visitors that came in August 2016. Total cruise visitors (arrivals by cruise ships and by air to board the Hawai'i home-ported cruise ship) increased in August 2017 (+9.8% to 12,715 visitors).
- Through the first eight months of 2017, 43 out-of-state cruise ships brought 76,356 visitors to Hawai'i compared to 31 cruise ships that carried 59,390 visitors over the same period last year. Total cruise visitors (by air and ship) increased year-to-date in 2017 (+21.9% to 160,964).

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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.hawaiiourismauthority.org/research/research/visitor-highlights/](http://www.hawaiiourismauthority.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.hawaiiourismauthority.org/research/reports/major-market-areas/](http://www.hawaiiourismauthority.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.hawaiiauthority.org](http://www.hawaiiauthority.org). Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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**AUGUST 2017 ARRIVALS AT A GLANCE**

CATEGORY AND MMA	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,392.4</b>	<b>1,312.2</b>	<b>6.1</b>	<b>11,339.2</b>	<b>10,446.6</b>	<b>8.5</b>
Total by air	1,391.4	1,311.4	6.1	11,316.0	10,423.9	8.6
U.S. West	489.9	482.8	1.5	4,150.1	3,775.1	9.9
U.S. East	328.3	294.0	11.7	2,992.4	2,652.3	12.8
Japan	231.6	211.7	9.4	1,485.1	1,327.8	11.8
Canada	51.0	48.0	6.2	706.2	650.5	8.6
All Others	290.5	274.9	5.7	1,982.2	2,018.1	-1.8
Visitor arrivals by cruise ships	1.0	0.9	14.2	23.2	22.7	2.3
<b>TOTAL VISITOR DAYS</b>	<b>7,050,768</b>	<b>6,817,669</b>	<b>3.4</b>	<b>56,921,460</b>	<b>54,469,009</b>	<b>4.5</b>
Total by air	7,034,919	6,811,007	3.3	56,578,626	54,198,237	4.4
U.S. West	2,909,422	2,892,068	0.6	23,467,826	22,775,613	3.0
U.S. East	1,553,412	1,460,450	6.4	14,341,158	13,408,750	7.0
Japan	1,033,986	963,989	7.3	6,204,718	5,708,128	8.7
Canada	327,294	302,218	8.3	4,338,726	4,136,732	4.9
All Others	1,210,805	1,192,281	1.6	8,226,199	8,169,013	0.7
Visitor arrivals by cruise ships	15,850	6,662	137.9	342,834	270,772	26.6
<b>VISITOR ARRIVALS</b>	<b>818,581</b>	<b>780,723</b>	<b>4.8</b>	<b>6,315,435</b>	<b>6,031,940</b>	<b>4.7</b>
Total by air	815,949	778,840	4.8	6,239,078	5,972,550	4.5
U.S. West	342,054	329,951	3.7	2,583,538	2,491,537	3.7
U.S. East	159,572	149,705	6.6	1,412,071	1,305,457	8.2
Japan	160,424	152,438	5.2	1,034,352	969,533	6.7
Canada	29,542	27,881	6.0	345,044	323,571	6.6
All Others	124,358	118,864	4.6	864,074	882,452	-2.1
Visitor arrivals by cruise ships	2,632	1,883	39.8	76,356	59,390	28.6
<b>AVERAGE LENGTH OF STAY</b>	<b>8.61</b>	<b>8.73</b>	<b>-1.4</b>	<b>9.01</b>	<b>9.03</b>	<b>-0.2</b>
Total by air	8.62	8.75	-1.4	9.07	9.07	-0.1
U.S. West	8.51	8.77	-3.0	9.08	9.14	-0.6
U.S. East	9.73	9.76	-0.2	10.16	10.27	-1.1
Japan	6.45	6.32	1.9	6.00	5.89	1.9
Canada	11.08	10.84	2.2	12.57	12.78	-1.6
All Others	9.74	10.03	-2.9	9.52	9.26	2.8
Visitor arrivals by cruise ships	6.02	3.54	70.2	4.49	4.56	-1.5
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>197.5</b>	<b>192.5</b>	<b>2.6</b>	<b>199.2</b>	<b>191.8</b>	<b>3.9</b>
Total by air	197.8	192.5	2.7	200.0	192.3	4.0
U.S. West	168.4	166.9	0.9	176.8	165.8	6.7
U.S. East	211.4	201.3	5.0	208.7	197.8	5.5
Japan	224.0	219.6	2.0	239.3	232.6	2.9
Canada	155.7	158.7	-1.9	162.8	157.3	3.5
All Others	240.0	230.5	4.1	241.0	247.0	-2.5
Visitor arrivals by cruise ships	61.2	127.6	-52.0	67.7	83.8	-19.2
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,701.0</b>	<b>1,680.8</b>	<b>1.2</b>	<b>1,795.5</b>	<b>1,731.9</b>	<b>3.7</b>
Total by air	1,705.3	1,683.7	1.3	1,813.7	1,745.3	3.9
U.S. West	1,432.3	1,463.2	-2.1	1,606.4	1,515.2	6.0
U.S. East	2,057.6	1,964.0	4.8	2,119.1	2,031.7	4.3
Japan	1,443.9	1,388.9	4.0	1,435.8	1,369.6	4.8
Canada	1,725.0	1,720.4	0.3	2,046.7	2,010.5	1.8
All Others	2,336.4	2,312.4	1.0	2,294.0	2,286.9	0.3
Visitor arrivals by cruise ships	368.8	451.5	-18.3	304.2	382.2	-20.4

P=Preliminary data.

Source:Hawai'i Tourism Authority

## AUGUST 2017 ISLAND HIGHLIGHTS

CATEGORY AND ISLAND	2017P	2016P	% change	YTD 2017P	YTD 2016P	% change
<b>TOTAL EXPENDITURES (\$mil.)</b>	<b>1,392.4</b>	<b>1,312.2</b>	<b>6.1</b>	<b>11,339.2</b>	<b>10,446.6</b>	<b>8.5</b>
Total by air	1,391.4	1,311.4	6.1	11,316.0	10,423.9	8.6
O'ahu	698.7	643.5	8.6	5,150.8	4,803.5	7.2
Maui	364.8	350.6	4.0	3,210.4	3,052.2	5.2
Moloka'i	1.4	3.3	-55.6	22.5	20.8	8.2
Lāna'i	5.4	10.1	-46.2	53.3	54.9	-2.9
Kaua'i	147.4	141.7	4.0	1,267.0	1,126.4	12.5
Haw ai'i Island	173.7	162.2	7.1	1,612.0	1,366.1	18.0
Visitor arrivals by cruise ships	1.0	0.9	14.2	23.2	22.7	2.3
<b>TOTAL VISITOR DAYS</b>	<b>7,050,768</b>	<b>6,817,669</b>	<b>3.4</b>	<b>56,921,460</b>	<b>54,469,009</b>	<b>4.5</b>
Total by air	7,034,919	6,811,007	3.3	56,578,626	54,198,237	4.4
O'ahu	3,468,841	3,416,674	1.5	26,030,970	25,192,602	3.3
Maui	1,732,476	1,703,536	1.7	14,921,064	14,604,491	2.2
Moloka'i	17,099	27,213	-37.2	183,661	196,527	-6.5
Lāna'i	15,346	18,390	-16.6	142,102	142,160	0.0
Kaua'i	787,352	746,544	5.5	6,548,901	6,229,939	5.1
Haw ai'i Island	1,013,805	898,650	12.8	8,751,928	7,832,517	11.7
Visitor arrivals by cruise ships	15,850	6,662	137.9	342,834	270,772	26.6
<b>VISITOR ARRIVALS</b>	<b>818,581</b>	<b>780,723</b>	<b>4.8</b>	<b>6,315,435</b>	<b>6,031,940</b>	<b>4.7</b>
Total by air	815,949	778,840	4.8	6,239,078	5,972,550	4.5
O'ahu	517,206	497,994	3.9	3,814,830	3,669,194	4.0
Maui	233,266	227,652	2.5	1,855,831	1,798,630	3.2
Moloka'i	4,529	5,761	-21.4	37,547	41,835	-10.3
Lāna'i	5,464	6,039	-9.5	42,773	42,179	1.4
Kaua'i	111,904	104,838	6.7	866,572	807,659	7.3
Haw ai'i Island	152,550	133,561	14.2	1,196,926	1,049,969	14.0
Visitor arrivals by cruise ships	2,632	1,883	39.8	76,356	59,390	28.6
<b>AVERAGE LENGTH OF STAY</b>	<b>8.61</b>	<b>8.73</b>	<b>-1.4</b>	<b>9.01</b>	<b>9.03</b>	<b>-0.2</b>
Total by air	8.62	8.75	-1.4	9.07	9.07	-0.1
O'ahu	6.71	6.86	-2.2	6.82	6.87	-0.6
Maui	7.43	7.48	-0.7	8.04	8.12	-1.0
Moloka'i	3.78	4.72	-20.1	4.89	4.70	4.1
Lāna'i	2.81	3.05	-7.8	3.32	3.37	-1.4
Kaua'i	7.04	7.12	-1.2	7.56	7.71	-2.0
Haw ai'i Island	6.65	6.73	-1.2	7.31	7.46	-2.0
Visitor arrivals by cruise ships	6.02	3.54	70.2	4.49	4.56	-1.5
<b>PER PERSON PER DAY SPENDING (\$)</b>	<b>197.5</b>	<b>192.5</b>	<b>2.6</b>	<b>199.2</b>	<b>191.8</b>	<b>3.9</b>
Total by air	197.8	192.5	2.7	200.0	192.3	4.0
O'ahu	201.4	188.3	6.9	197.9	190.7	3.8
Maui	210.6	205.8	2.3	215.2	209.0	3.0
Moloka'i	84.8	120.1	-29.4	122.5	105.8	15.7
Lāna'i	353.0	547.6	-35.5	375.2	386.3	-2.9
Kaua'i	187.2	189.8	-1.4	193.5	180.8	7.0
Haw ai'i Island	171.3	180.5	-5.1	184.2	174.4	5.6
Visitor arrivals by cruise ships	61.2	127.6	-52.0	67.7	83.8	-19.2
<b>PER PERSON PER TRIP SPENDING (\$)</b>	<b>1,701.0</b>	<b>1,680.8</b>	<b>1.2</b>	<b>1,795.5</b>	<b>1,731.9</b>	<b>3.7</b>
Total by air	1705.3	1683.7	1.3	1813.7	1745.3	3.9
O'ahu	1350.9	1292.2	4.5	1350.2	1309.1	3.1
Maui	1564.0	1540.3	1.5	1729.9	1697.0	1.9
Moloka'i	320.1	567.2	-43.6	599.3	497.2	20.5
Lāna'i	991.4	1667.5	-40.5	1246.5	1301.9	-4.3
Kaua'i	1316.8	1351.5	-2.6	1462.1	1394.6	4.8
Haw ai'i Island	1138.5	1214.4	-6.3	1346.8	1301.1	3.5
Visitor arrivals by cruise ships	368.8	451.5	-18.3	304.2	382.2	-20.4

P=Preliminary data.

Source:Haw ai'i Tourism Authority