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MAUI VISITOR INDUSTRY DATA AND TRENDS
PARTIAL UPDATE TO INCLUDE PRELIMINARY 2016 DATA

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Maui Visitors Bureau

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UPDATE SUMMARY

Purpose

The report *Maui Visitor Industry Data and Trends* (intended as initial input to the next Maui Tourism Strategic Plan) was finished in November 2016, a few months after final official tourism data were published by the Hawai'i Tourism Authority (HTA). Since then, preliminary 2016 ("2016p") have also been published by the HTA.

Currently available 2016p numbers are not only preliminary, but also incomplete – they do not include everything in the HTA's *Annual Visitor Research Report* used for the Maui report in November 2016. ***This update provides tweaked charts just for original Figure 3 through Figure 10, considered some of the most critical information in the report, as these pertain to visitor counts and visitor dollars.***

JMK Associates adjusted all dollar values for inflation to provide a more accurate picture of the economic benefits of tourism over time, and this update continues to use 2015 dollars¹ in order to keep the charts looking as they did in the complete Nov. 2016 study.

Preliminary 2016 Figures Worth Noting

The original report stressed that – both for Maui and statewide – after the Great Recession, visitor counts have recovered faster than visitor dollars. "Real" (inflation-adjusted) average daily visitor spending plummeted before the Recession and has been recovering much more slowly than it declined before – and even that relatively slow recovery has recently flattened out (again, when adjusted for inflation).

The preliminary 2016 data do not change this basic picture, but do have these features:

- There was good news for Maui County, in that growth in both visitor counts and total real visitor dollars continued, and Maui's visitor numbers grew faster than statewide figures (see updated Figure 3 and Figure 4).
- Visitor counts in 2016 increased at least slightly on all islands, but the growth for Maui County remained particularly good. With one re-opened hotel, Lāna'i made a strong recovery, though Moloka'i's improvement was slight (Figure 5 and Figure 6).
- Real total visitor expenditures for Maui County in 2016 grew faster than they had in the past several years (especially on Lāna'i). But Moloka'i growth in real total dollars flattened, and O'ahu continued to decline from a 2012 peak (Figure 7 and Figure 8).
- However, for the ***key measure of average daily spending***,² 2016 improvement was truly "great" only for Lāna'i. It dropped for Moloka'i. Maui Island (and Maui County overall) simply saw a return to 2014 levels after a slight 2015 drop. But O'ahu also dropped, and Maui's figure is now again higher than O'ahu's (Figure 9, Figure 10).

¹ To convert 2016 dollars to 2015, we used official State projections for the 2016 Honolulu CPI.

² Note these updated charts differ very slightly from originals, in that they now reflect Arrivals by Air only.

Figure 3: Average Air Visitor Census – State 1951-2016p, Maui County 1970-2016p

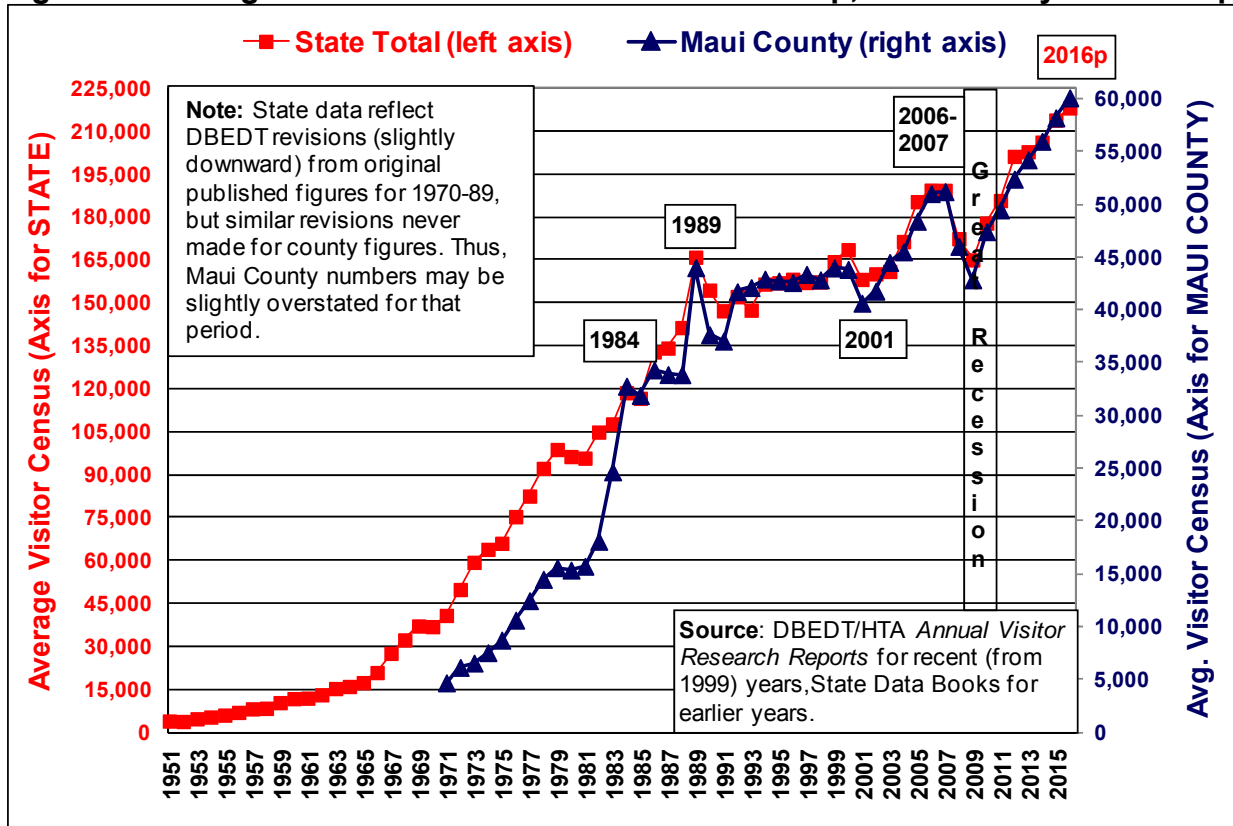


Figure 4: Total Visitor Expenditures – State 1951-2016p, Maui County 2002-2016p

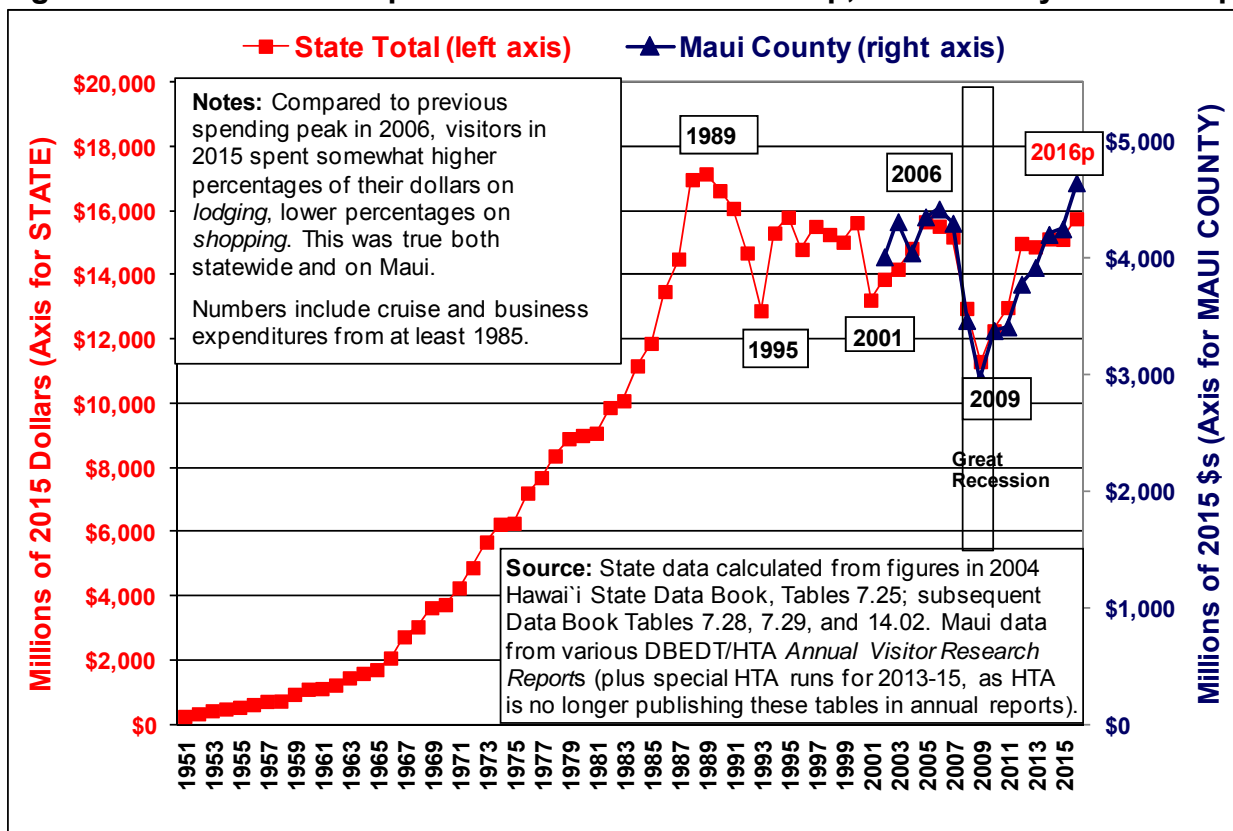


Figure 5: Average Air Visitor Census by County, 1999-2016p

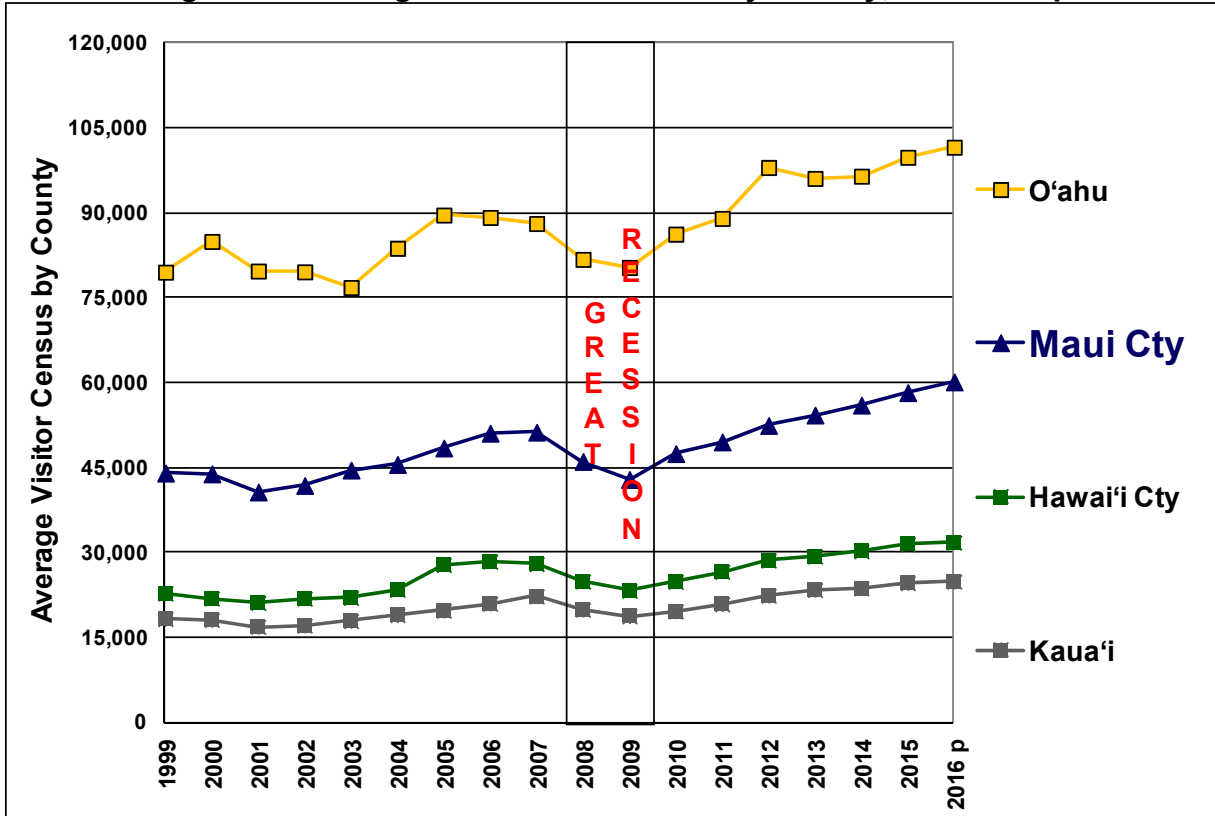


Figure 6: Average Air Visitor Census for Lāna'i and Moloka'i, 1990-2016p

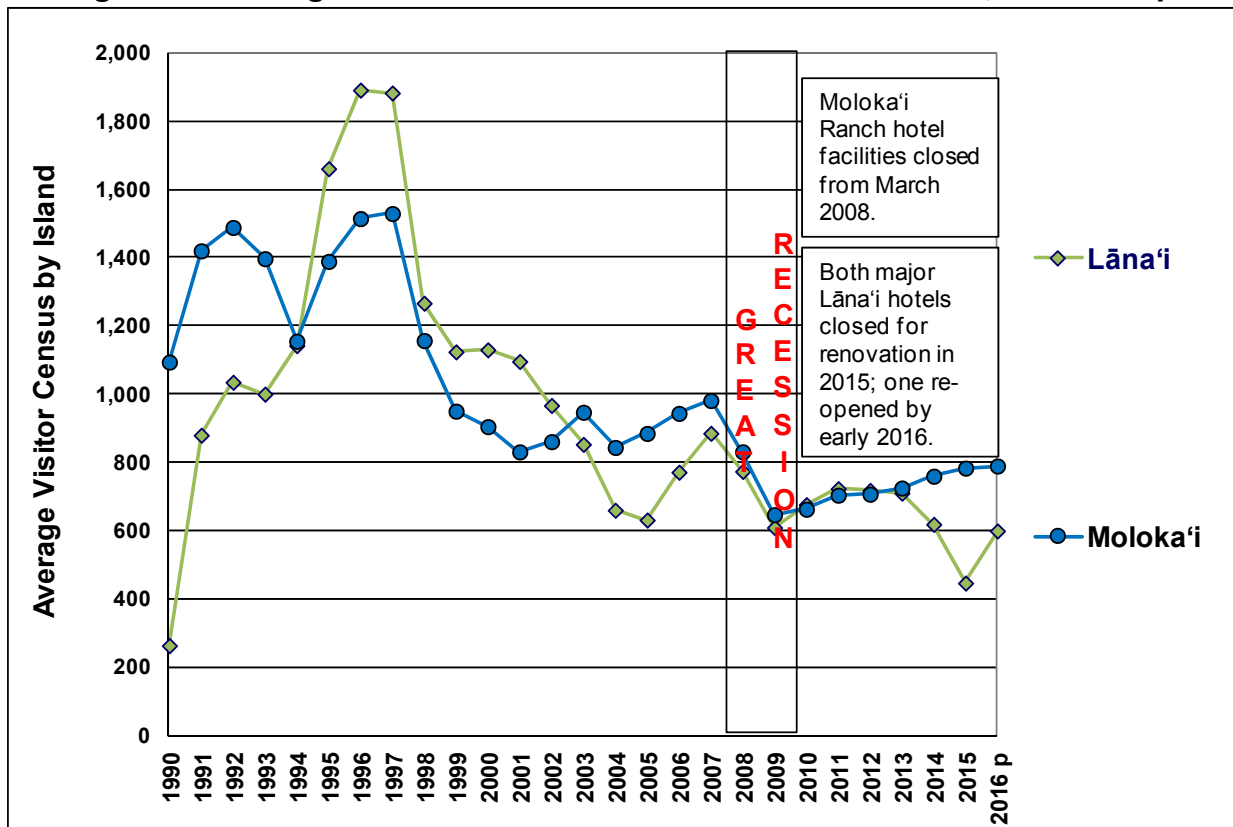


Figure 7: Total Visitor Expenditures by County, 2002-16p

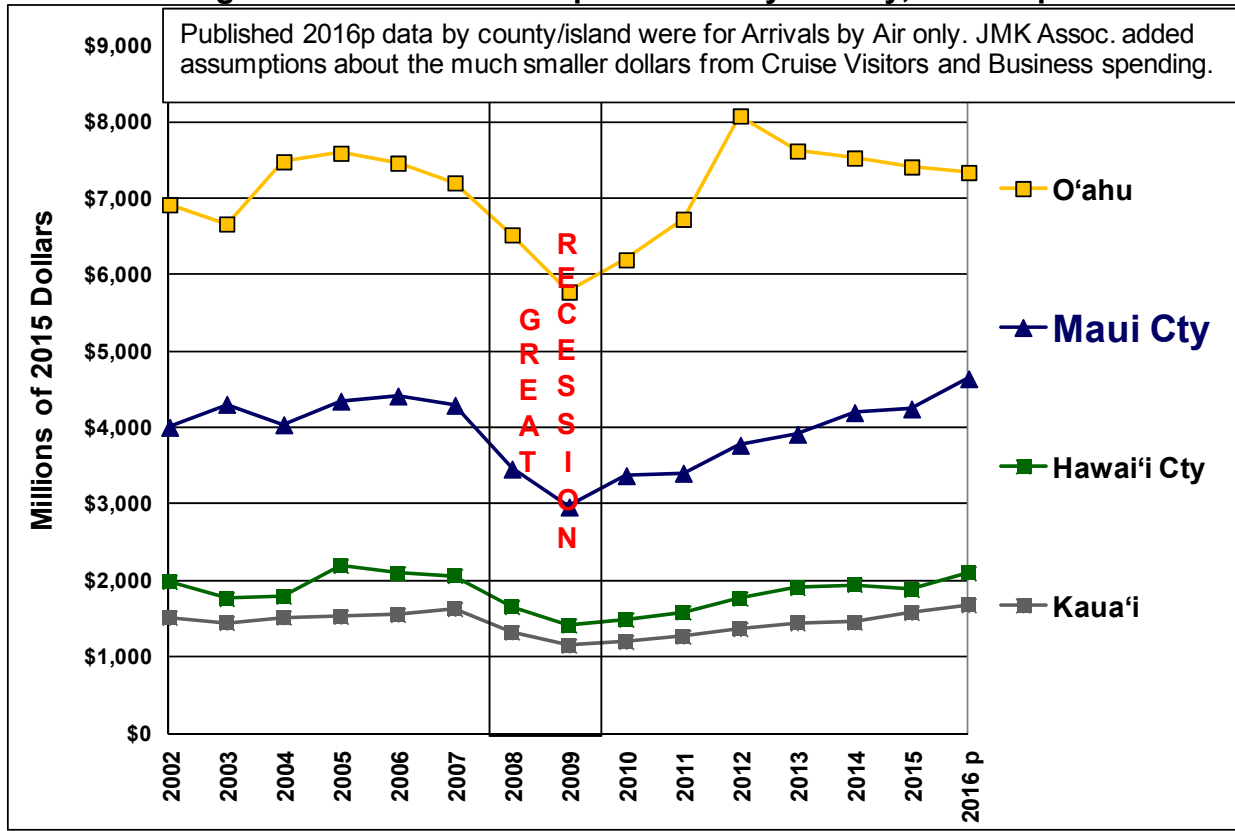


Figure 8: Total Visitor Expenditures for Lāna'i and Moloka'i, 2002-16p

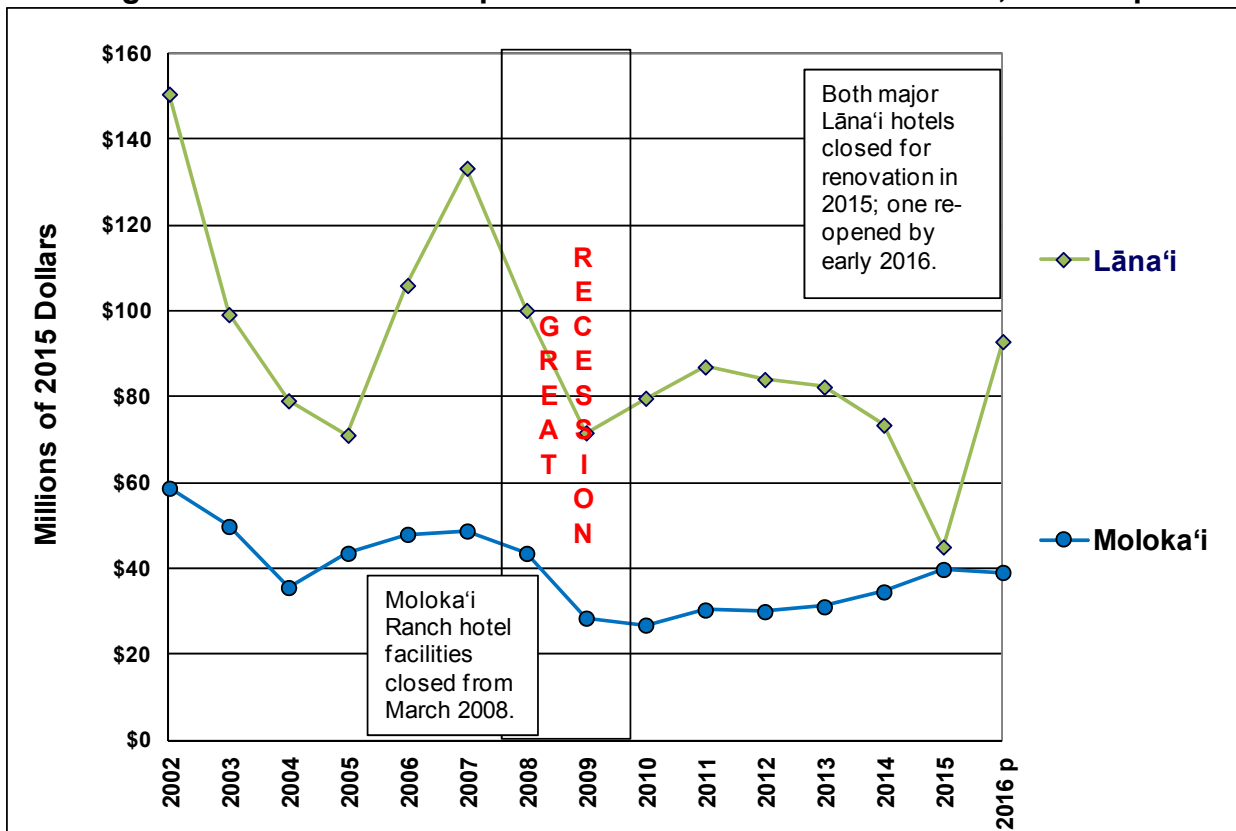


Figure 9: Average Daily Spending – State 1952-2016p, Maui Island 2003-2016p

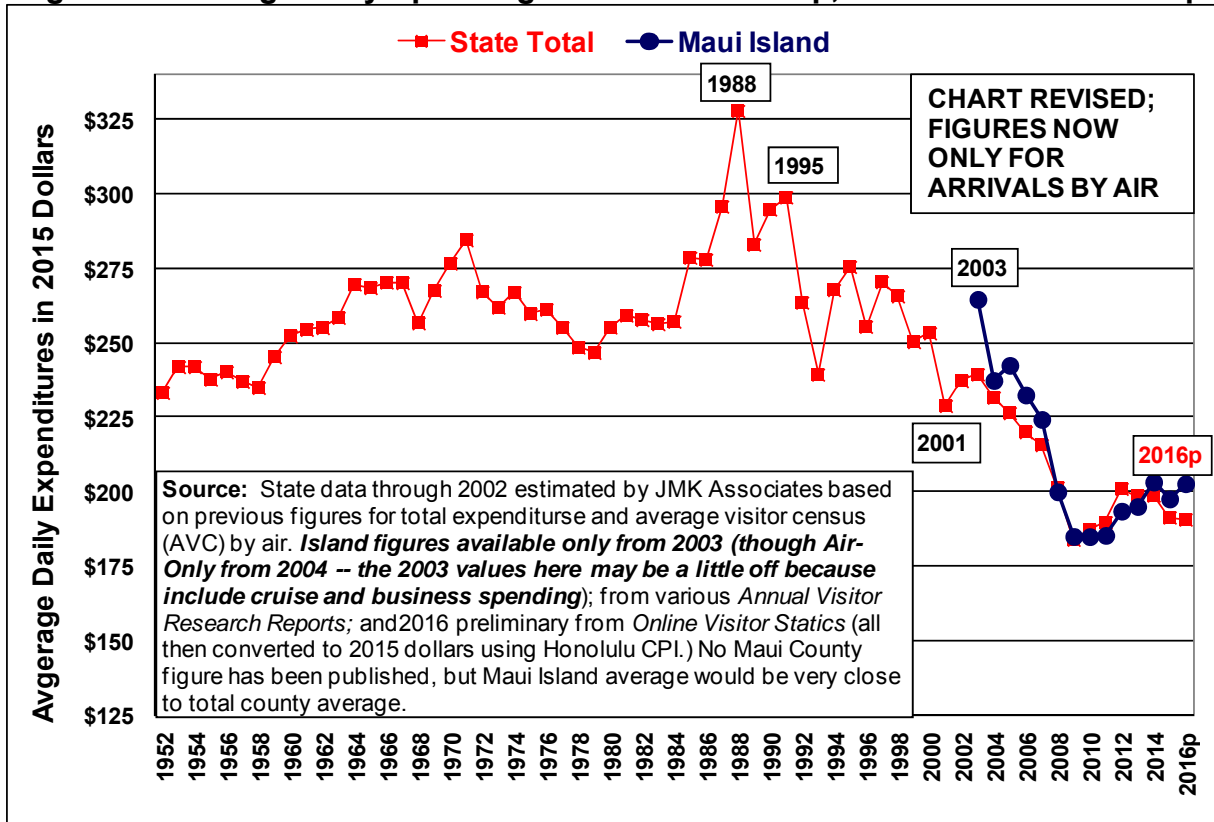


Figure 10: Average Daily Spending for Six Major Hawaiian Islands, 2003-2016p

