



"HVCB Tourism Industry Update" is a bi-weekly briefing of travel news and developments affecting Hawaii's visitor industry, compiled by the HVCB Market Trends Department.

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**FOR IMMEDIATE RELEASE**

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**1. FEATURE**

**➤ Maui's Top City Markets Show Strong Growth Through October**

The number of visitors to Maui from nine of the top 10 U.S. metropolitan statistical area (MSA) markets topped previous-year levels through October 2006, in keeping with the state's record high domestic arrivals year-to-date.

- Maui's top market, Los Angeles, was the source of nearly 269,000 visitors through October, up 6.5 percent from the same period in 2005. The second largest source market, the San Francisco Bay Area, reached nearly 179,000 visitors, up 2.5 percent during the same period.
- Some of the other top U.S. West markets that grew during the first 10 months of the year include Seattle (+6.1%); San Diego (+6.8%); Phoenix (+38.2%); Sacramento (+7.6%); and Portland (+7.2%). These significant increases in preliminary arrivals were fueled in part by added air services, including America West Airlines' flights to Kahului, which helped boost Phoenix arrivals nearly 40 percent.

**Preliminary 2006 Arrivals to Maui from Top 10 MSAs**  
 January - October 2006

Metropolitan Statistical Area	Total YTD	
	Jan-Oct	% Change 2006/2005
LOS ANGELES-RIVERSIDE-ORANGE COUNTY, CA CMSA	268,712	6.5%
SAN FRANCISCO-OAKLAND-SAN JOSE, CA CMSA	178,812	2.5%
SEATTLE-TACOMA-BREMINGTON, WA CMSA	77,563	6.1%
NEW YORK-NORTHERN NEW JERSEY-LONG ISLAND, NY-NJ CT-PA CMSA	66,530	-4.5%
SAN DIEGO, CA	56,106	6.8%
CHICAGO-GARY-KENOSHA, IL-IN-WI CMSA	51,692	1.5%
PHOENIX-MESA, AZ	51,455	38.2%
SACRAMENTO-YOLO, CA CMSA	43,453	7.6%
PORTLAND-SALEM, OR-WA CMSA	39,972	7.2%
WASHINGTON-BALTIMORE, DC-MD-VA-WV CMSA	32,385	4.6%

Source: HVCB analysis of DBEDT data

- The top U.S. East market, New York, decreased 4.5 percent during the ten-month period. However, both Chicago (+1.5%) and Washington D.C./Baltimore (+4.6%) have experienced growth through October.
- For updated Maui figures (including Moloka'i and Lāna'i estimates) and to compare with statewide arrivals, visit HVCB's **Market Trends Online** website: <http://www.hvcb.org/trends>

## 2. MAUI MARKET UPDATE

### ☛ Visitor Arrivals to Maui Up Four Percent; Spending up 11 Percent Through October

According to preliminary figures published by the state [Department of Business, Economic Development and Tourism](#), total arrivals to Maui have reached over 2.0 million, up 4.3 percent year-to-date through October 2006. Per-person-per-day spending (PPPD) on Maui has risen 6.6 percent, averaging \$195.40, helping boost year-to-date total expenditures up 11.1 percent (to \$2.9 billion).

Domestic arrivals, which made up 89 percent of all arrivals to the *Magic Isle*, increased 4.0 percent, while international arrivals grew 6.6 percent during the 10-month period.

- U.S. West arrivals to Maui equaled 986,240 through October, up 4.8 percent.
- U.S. East arrivals are up 1.6 percent, totaling over 692,000 through the first 10 months of the year.
- Arrivals from Canada to Maui are up 27.5 percent for the period, reaching nearly 101,500.
- Arrivals from Japan totaled nearly 80,270, down 10.8 percent through October.

Maui Highlights: YTD Through October 2006		
Jan-Oct 2006	Maui	% Chge
Total Arrivals	2,013,545	4.3%
Total Expenditures (\$mil.)	\$ 2,906.9	11.1%
PPPD Spending (\$)	\$ 195.4	6.6%
Domestic Arrivals	1,786,891	4.0%
Int'l Arrivals	226,654	6.6%
Domestic Length of Stay	7.52	-1.1%
Int'l Length of Stay	6.38	10.0%

Source: DBEDT

### ☛ Air Seat Capacity to Kahului Projected to Increase 12 Percent This Winter

Total scheduled air seats to Kahului Airport (OGG) are projected to increase 12.1 percent this winter (December 2006-February 2007) compared to the same season last year, according to a [Department of Business, Economic Development, and Tourism](#) (DBEDT) analysis of OAG flight schedules:

- Scheduled non-stop air seats to Kahului from the U.S. West are projected to reach nearly 413,000 during the three-month rolling air service forecast, up 23.0 percent over prior-year levels. Seats from OGG's largest gateway, Los Angeles, will decrease 1.6 percent during the winter, and San Francisco, the second largest gateway, is expected to show a 27.5 percent drop, mainly due to a shift in lift to Oakland (+189.8%). Total lift to OGG will be boosted mainly from its third, fourth, and fifth largest air markets -- Phoenix (+45.3%); Seattle (+29.6%); and San Diego (+212.9%), respectively.
- Scheduled air seats from the U.S. East to Maui are projected to decrease 45.1 percent during the three-month forecast period, with notable drops from Chicago (-36.6%) and Atlanta (-88.6%). Air seats from Dallas, the second largest U.S. East market (after Chicago), will increase 3.3 percent this winter.
- Canadian air seats to OGG are projected to grow 57.8 percent during the three-month period.

Kahului Scheduled Air Seats Outlook* Winter 2006/2007 (December 2006-February 2007)		
	Kahului	
	Dec 2006- Feb 2007	% Change
<b>TOTAL SEATS</b>	<b>513,835</b>	<b>12.1%</b>
U.S. West	412,804	23.0%
U.S. East	48,291	-45.9%
Canada	52,740	57.8%

\* DBEDT analysis based on flights in OAG flight schedules as of November 2006. These are scheduled air seats and may be subject to change.

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*Happy Holidays from HVCB!*

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