

HAWAII TOURISM

AUTHORITY



2015 Annual Visitor Research Report

ABOUT THIS REPORT

The 2015 Annual Visitor Research report provides the final statistics on Hawai'i's visitor industry in 2015 and a comprehensive comparison with 2014 visitor data. Included in this report are characteristics and expenditures data from visitors who came to Hawai'i by air or by cruise ships. Visitor statistics are categorized by Hawai'i's Major Market Areas (MMA), by select countries, purpose of trip, accommodation type, first-time or repeat visitor status and by island. Statistics about visitor room inventory, hotel occupancy, room rates and air seat capacity are also included.

This report was produced by the Tourism Research staff of the Hawai'i Tourism Authority (HTA). The HTA is headed by Mr. George Szigeti. This report was prepared by Mr. Daniel Nahoopii, Ms. Jennifer Chun, Ms. Minh-Chau Chun and Mr. Lawrence Liu.

STR Inc./Hospitality Advisors LLC provided hotel occupancy and room rate statistics.

Professional Image designed the cover and printed this report.

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For more information on the content of this report, contact the HTA at (808) 973-2255.

*** Revision to 2014 Visitor Statistics**

2014 visitor statistics in this report (including visitor expenditures, visitor days, visitor arrivals, average daily census, length of stay, accommodations, purpose of trip, visitor characteristics by major markets and by island, etc.) were revised from 2014 data published in The 2014 Annual Visitor Research Report released in August 2015. Tables with revised statistics are indicated as 2014R.

Figures were revised with updated statistics from the Federal Office of Travel and Tourism Industries (OTTI) and updated reports from airlines. Cruise visitor statistics, air seats, Visitor Plant Inventory, Visitor Satisfaction and hotel performance data were not affected.

2015 statistics presented in this report are the final numbers and reflect data from OTTI, actual air fares and updated reports from airlines and cruise ships.

TABLE OF CONTENTS

SUMMARY OF 2015 VISITORS TO HAWAII	1
ALL VISITORS (BY AIR AND BY CRUISE SHIPS).....	2
VISITORS (ARRIVALS BY AIR).....	3
AIR VISITORS (BY MAJOR MARKET AREAS).....	4
U.S. WEST.....	5
U.S. EAST.....	6
JAPAN.....	7
CANADA.....	8
EUROPE.....	9
OCEANIA.....	10
OTHER ASIA.....	12
LATIN AMERICA.....	14
AIR VISITORS (BY SEGMENT).....	15
TRAVEL METHODS.....	15
PURPOSE OF TRIP	15
FAMILY VISITORS	17
ACCOMMODATIONS.....	18
FIRST-TIME/REPEAT VISITORS	20
AIR VISITORS (BY ISLANDS)	21
O‘AHU.....	21
MAUI.....	22
MOLOKAI.....	24
LANAI.....	24
KAUAI.....	25
HAWAII ISLAND.....	26
SEASONALITY BY ISLAND	28
CRUISE VISITORS	28
TOTAL AIR SEATS OPERATED TO HAWAII.....	30
HOTEL OCCUPANCY AND ROOM RATE.....	31
VISITOR PLANT INVENTORY	32
VISITOR SATISFACTION	33
ANNUAL VISITOR RESEARCH REPORT TABLES	35
APPENDIX A	166
TECHNICAL NOTES.....	167
DEFINITIONS.....	167
SOURCES OF DATA FOR VISITOR STATISTICS.....	170
APPENDIX B	172
DOMESTIC IN-FLIGHT SURVEY	173
INTERNATIONAL INTERCEPT SURVEY	175
ISLAND SURVEY	177
CRUISE SURVEY.....	179

LIST OF FIGURES

Figure 1: Total Visitor Expenditures: Nominal & Real	2
Figure 2: 2014 Air Visitor Personal Daily Spending by Category and Selected MMA.....	3
Figure 3: Four Largest Markets' Share of Total Visitor Expenditures	4
Figure 4: Visitor Arrivals from Four Largest Markets (by Air).....	4
Figure 5: Europe MMA, UK & Germany.....	9
Figure 6: Oceania MMA	11
Figure 7: Other Asia MMA	12
Figure 8: Latin America MMA.....	14
Figure 9: 2014 Visitor Personal Daily Spending by Category and Island.....	21
Figure 10: O'ahu Visitor Arrivals by Selected MMA.....	22
Figure 11: Maui Visitor Arrivals by Selected MMA.....	23
Figure 12: Kaua'i Visitor Arrivals by Selected MMA	25
Figure 13: Hawai'i Island Visitor Arrivals by Selected MMA	26
Figure 14: Cruise Visitors to Hawai'i: 2006 – 2014.....	29
Figure 15: Air Seats Operated to Hawai'i by Island	31
Figure 16: Visitor Units by Type of Accommodations: 2005 – 2014.....	32

LIST OF TABLES

Table 1: Summary of Visitor Statistics.....	36
Table 2: Summary of Visitor Characteristics (Arrivals by Air).....	39
Table 3: Summary of Visitor Characteristics - Percentage of Total (Arrivals by Air)	40
Table 4: Visitor Days by Island (Arrivals by Air).....	41
Table 5: Visitor Days by Month (Arrivals by Air)	41
Table 6: Average Daily Census by Island (Arrivals by Air)	42
Table 7: Average Daily Census by Month (Arrivals by Air).....	42
Table 8: Visitors Staying Overnight or Longer (Arrivals by Air).....	43
Table 9: Visitor Days by Month and MMA (Arrivals by Air)	44
Table 10: Visitor Days Growth by Month and MMA.....	48
Table 11: Visitor Arrivals by Month and MMA (Arrivals by Air)	50
Table 12: Visitor Arrivals Growth by Month and MMA.....	54
Table 13: U.S. West MMA Visitor Characteristics (Arrivals by Air).....	56
Table 14: Domestic U.S. West MMA Visitor Arrivals by Month and State (Arrivals by Air).....	57
Table 15: U.S. East MMA Visitor Characteristics (Arrivals by Air)	59
Table 16: Domestic U.S. East Visitor Arrivals by Month and State (Arrivals by Air)	60
Table 17: Domestic U.S. Visitors by State (Arrivals by Air)	62
Table 18: Domestic U.S. Visitor Characteristics by State (Arrivals by Air)	63
Table 19: Market Penetration for Top U.S. CBSA (Arrivals by Air)	65
Table 20: Japan MMA Visitor Characteristics (Arrivals by Air)	66
Table 21: International Japanese MMA Visitor Characteristics by Region.....	67
Table 22: Canada MMA Visitor Characteristics (Arrivals by Air)	69
Table 23: Canadian MMA Visitor Characteristics by Province	70
Table 24: Europe MMA Visitor Characteristics (Arrivals by Air)	72
Table 25: United Kingdom Visitor Characteristics (Arrivals by Air)	73

Table 26: Germany Visitor Characteristics (Arrivals by Air).....	74
Table 27: Oceania MMA Visitor Characteristics (Arrivals by Air).....	75
Table 28: Australia Visitor Characteristics (Arrivals by Air)	76
Table 29: New Zealand Visitor Characteristics (Arrivals by Air)	77
Table 30: Other Asia MMA Visitor Characteristics (Arrivals by Air).....	78
Table 31: Korea Visitor Characteristics (Arrivals by Air)	79
Table 32: China Visitor Characteristics (Arrivals by Air).....	80
Table 33: Taiwan Visitor Characteristics (Arrivals by Air)	81
Table 34: Latin America MMA Visitor Characteristics (Arrivals by Air)	82
Table 35: Other MMA Visitor Characteristics (Arrivals by Air).....	83
Table 36: Visitor Age and Gender Distribution by MMA (Percentage of MMA Total)	84
Table 37: Honeymoon Visitor Characteristics (Arrivals by Air).....	86
Table 38: Get Married Visitor Characteristics (Arrivals by Air)	87
Table 39: Meetings, Conventions, and Incentives Visitor Characteristics (Arrivals by Air).....	88
Table 40: Visit Friends and Relatives Visitor Characteristics (Arrivals by Air)	89
Table 41: Family Visitors Characteristics (Arrivals by Air)	90
Table 42: Hotel-Only Visitor Characteristics (Arrivals by Air).....	91
Table 43: Condo-Only Visitor Characteristics (Arrivals by Air).....	92
Table 44: Timeshare-Only Visitor Characteristics (Arrivals by Air)	93
Table 45: Rental House-Only Visitor Characteristics (Arrivals by Air).....	94
Table 46: Bed and Breakfast-Only Visitor Characteristics (Arrivals by Air).....	95
Table 47: First-Time Visitor Characteristics (Arrivals by Air)	96
Table 48: Repeat Visitor Characteristics (Arrivals by Air).....	97
Table 49: Visitor Arrivals by Island and Month (Arrivals by Air)	98
Table 50: Average Daily Census by Island and Month (Arrivals by Air)	101
Table 51: Domestic U.S. Visitor Arrivals by Island and Top CBSA (Arrivals by Air).....	103
Table 52: Domestic U.S. Visitor Arrival Growth by Island and Top CBSA	105
Table 53: Domestic U.S. Visitor Arrivals by Island and State of Residence.....	106
Table 54: Domestic U.S. Visitor Arrival Growth by Island and State of Residence	108
Table 55: Domestic U.S. Visitor Length of Stay (in days) by Island and State.....	109
Table 56: O'ahu Visitor Characteristics (Arrivals by Air).....	111
Table 57: Maui County Visitor Characteristics (Arrivals by Air)	112
Table 58: Maui Island Visitor Characteristics (Arrivals by Air)	113
Table 59: Moloka'i Visitor Characteristics (Arrivals by Air).....	114
Table 60: Lāna'i Visitor Characteristics (Arrivals by Air).....	115
Table 61: Kaua'i Visitor Characteristics (Arrivals by Air).....	116
Table 62: Hawai'i Island Visitor Characteristics (Arrivals by Air)	117
Table 63: Hilo Visitor Characteristics (Arrivals by Air)	118
Table 64: Kona Visitor Characteristics (Arrivals by Air)	119
Table 65: Visitor Days by Island and MMA (Arrivals by Air)	120
Table 66: Visitor Days Growth by Island and MMA (Arrivals by Air)	124
Table 67: Visitor Arrivals by Island and MMA (Arrivals by Air)	126
Table 68: Visitor Arrival Growth by Island and MMA (Arrivals by Air).....	130
Table 69: Total Visitor Expenditures by Category	132
Table 70: Total Air Visitor Personal Daily Spending	133
Table 71: U.S. West MMA Air Visitor Personal Daily Spending	134
Table 72: U.S. East MMA Air Visitor Personal Daily Spending	135
Table 73: Japan MMA Air Visitor Personal Daily Spending.....	136

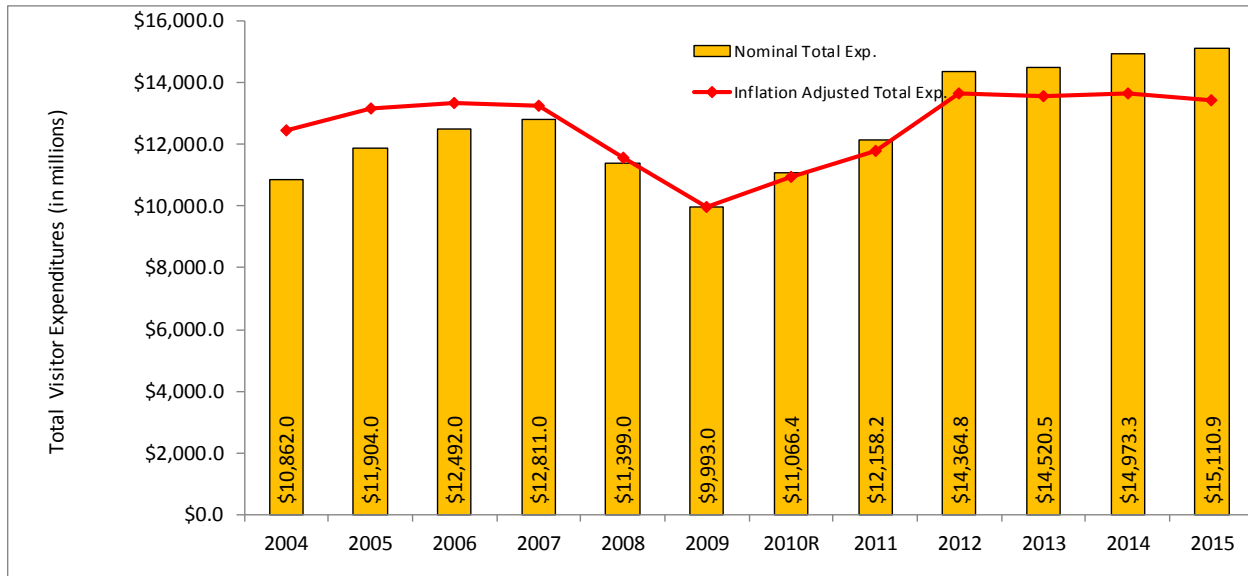
Table 74: Canada MMA Air Visitor Personal Daily Spending.....	137
Table 75: Europe MMA Air Visitor Personal Daily Spending.....	138
Table 76: Oceania MMA Air Visitor Personal Daily Spending	139
Table 77: Other Asia MMA Air Visitor Personal Daily Spending	140
Table 78: Latin America MMA Air Visitor Personal Daily Spending.....	141
Table 79: Other MMA Air Visitor Personal Daily Spending.....	142
Table 80: China Air Visitor Personal Daily Spending	143
Table 81: Korea Air Visitor Personal Daily Spending.....	144
Table 82: Taiwan Air Visitor Personal Daily Spending.....	145
Table 83: Australia Air Visitor Personal Daily Spending.....	146
Table 84: New Zealand Air Visitor Personal Daily Spending.....	147
Table 85: Air Visitor Personal Daily Spending.....	148
Table 86: Air Visitor Personal Daily Spending Growth	150
Table 87: Air Visitor Personal Daily Spending by Visitor and Trip Characteristics	151
Table 88: Meeting, Convention and Incentive (MCI) Visitor Characteristics and Spending	152
Table 89: Cruise Ship Visitors.....	153
Table 90: Cruise Ship Visitor Growth	153
Table 91: Total Cruise Ship Passengers by MMA.....	154
Table 92: Cruise Visitor Per Person Per Day Spending – All Cruise Visitors in Dollars	155
Table 93: Total Air Seats Operated To Hawai‘i.....	156
Table 94: Domestic Air Seats Operated To Hawai‘i	156
Table 95: International Air Seats To Hawai‘i.....	157
Table 96: State Hotel Occupancy and Room Rate	158
Table 97: O‘ahu Hotel Occupancy and Room Rate.....	158
Table 98: Maui Hotel Occupancy and Room Rate.....	159
Table 99: Kaua‘i Hotel Occupancy and Room Rates.....	159
Table 100: Hawai‘i Island Hotel Occupancy and Room Rates.....	160
Table 101: Visitor Plant Inventory – Existing Inventory by Island and Property	161
Table 102: Visitor Plant Inventory – Existing Inventory by Island and Unit.....	162
Table 103: Visitor Plant Inventory - Class of Units by Island	163
Table 104: Visitor Plant Inventory - Available Units by County.....	164
Table 105: Overall Rating of Most Recent Vacation to Hawai‘i.....	165
Table 106: Expectations of Vacation.....	165
Table 107: Likelihood to Recommend Hawai‘i	165
Table 108: Likelihood to Revisit Hawai‘i in the Next 5 Years	165

SUMMARY OF 2015 VISITORS TO HAWAI'I

ALL VISITORS (BY AIR AND BY CRUISE SHIPS)

A record total of 8,679,564 visitors arrived by air or by cruise ships to the Hawaiian Islands in 2015. This represented a 4.3 percent growth from the previous high of 8,320,785 visitors in 2014 (Table 1). Total visitor days rose 3.5 percent. However, the average spending per day by these visitors (\$191 per person) declined compared to 2014 (\$196 per person). Therefore, total expenditures by all visitors in 2015 of \$15.11 billion¹ was only a marginal increase from last year. When adjusted for inflation, total visitor expenditures were down 1.6 percent from 2014 (Figure 1).

**Figure 1: Total Visitor Expenditures: Nominal & Real
2004–2015**



Note: Implicit price deflator (2009=100)

Source: 2015 State of Hawai'i Data Book Table 7.35.

Arrivals by airlines increased 4.5 percent to 8,563,018 visitors. Additionally, there were 116,546 visitors who came to the islands by cruise ships², but this was a 6.3 percent drop compared to 2014, due to fewer out-of-state cruise ships that visited the islands (Table 89).

Total Spending by Category:

- Lodging, the largest expenditure category by all visitors to Hawai'i, rose 1.8 percent to \$6.3 billion and comprised 42 percent of total visitor expenditures in 2015 (Table 69).
- Food and beverage, the second largest category, grew 1.8 percent to \$3.1 billion or 20 percent of total visitor spending.
- Shopping expenditures of \$2.2 billion was a decline of 5.1 percent from 2014.
- Spending on transportation (+2.7% to \$1.4 billion) and entertainment and recreation (+1.8% to \$1.3 billion) increased from last year.

¹Transpacific airfare costs to and from Hawai'i were not included in visitor expenditure statistics (total spending, daily spending, per trip spending) throughout this report.

² Limited characteristics and expenditures for visitors who entered Hawai'i on board a cruise ship are reported separately in the Cruise Visitors section and are not included as part of the statistics reported for visitor arrivals by air.

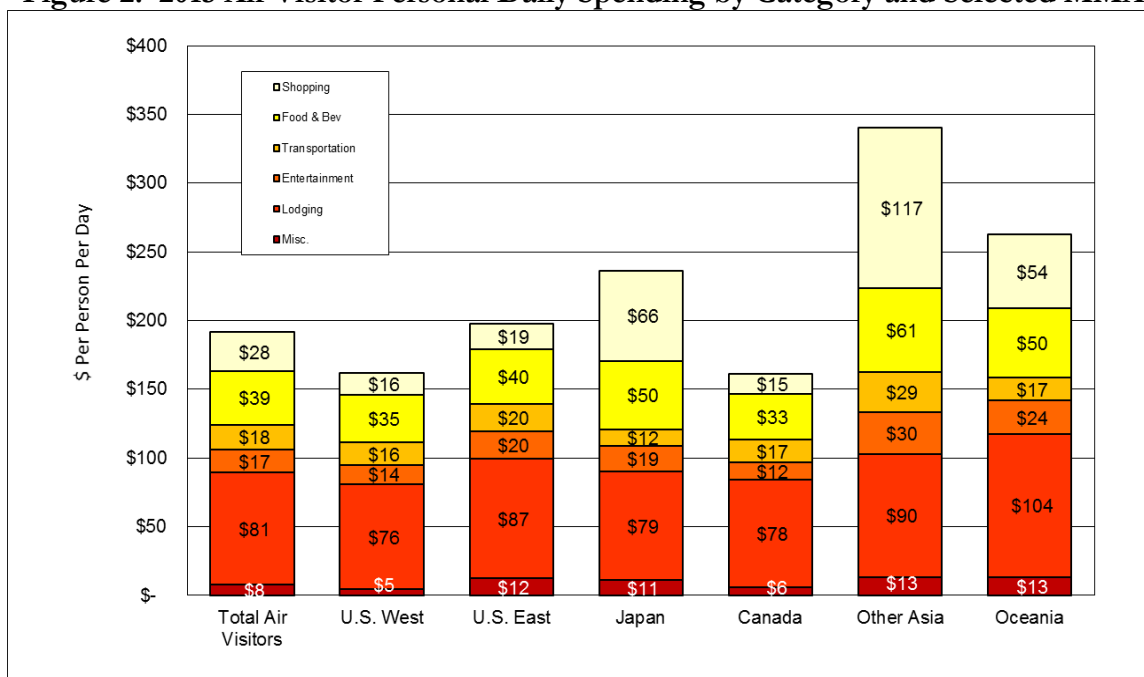
- Supplemental business expenditures of \$134.1 million were up 9.8 percent compared to 2014. These expenditures are additional business expenses spent locally on conventions and corporate meetings by out-of-state visitors (i.e. costs on space and equipment rentals, transportation, etc.) that were not included in personal spending.

VISITORS (ARRIVALS BY AIR)

Arrivals by airlines rose 4.5 percent to 8,563,018 visitors. The average daily census showed that December was the busiest month for air visitors in 2015 (248,617 visitors per day) and in 2014 (240,996 visitors per day) (Table 7). The average party size was 2.19 visitors, similar to the previous year (Table 2).

However, lower average daily spending (-2.8% to \$191 per person) (Table 70) resulted in only a slight gain in visitor expenditures (+0.9% to \$14.94 million) compared to 2014 (Table 1).

Figure 2: 2015 Air Visitor Personal Daily Spending by Category and Selected MMA



- In 2015, air visitors spent less on lodging (\$81 per person per day), food and beverage (\$39) and shopping (\$28) compared to last year. Daily spending on transportation (\$18) and entertainment and recreation (\$17) were similar to 2014 (Table 70).
- Lodging was the largest daily expense for most visitor markets except for Chinese visitors who spent more on shopping (Table 80).

AIR VISITORS (BY MAJOR MARKET AREAS)

Figure 3: Four Largest Markets' Share of Total Visitor Expenditures
2006 - 2015

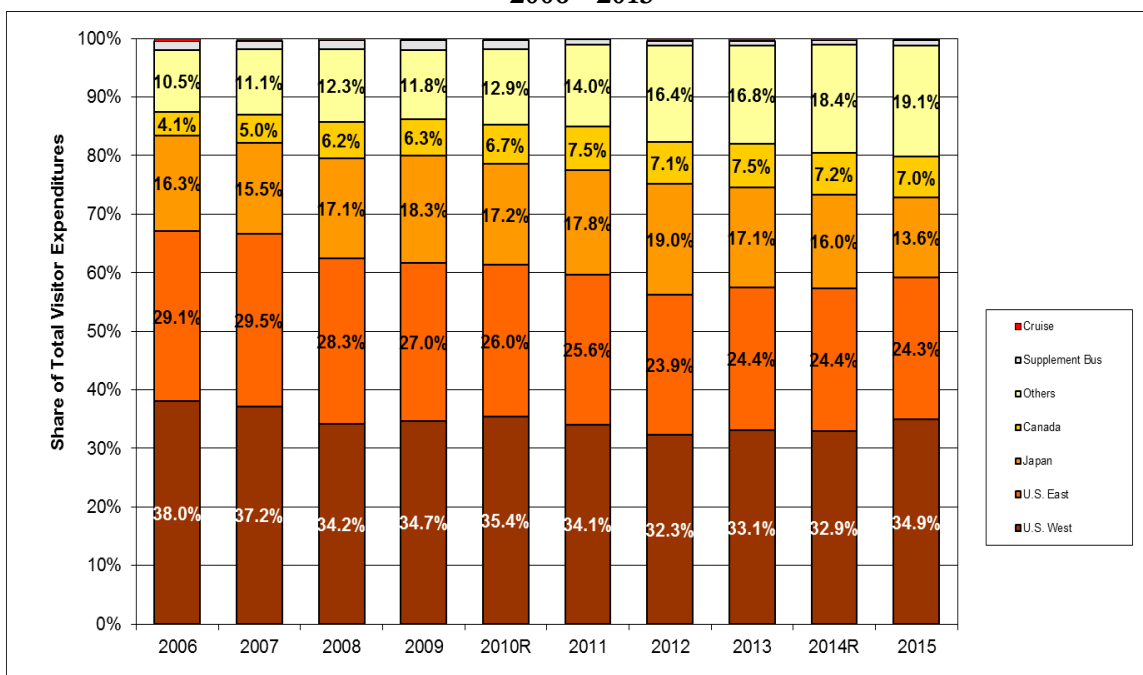
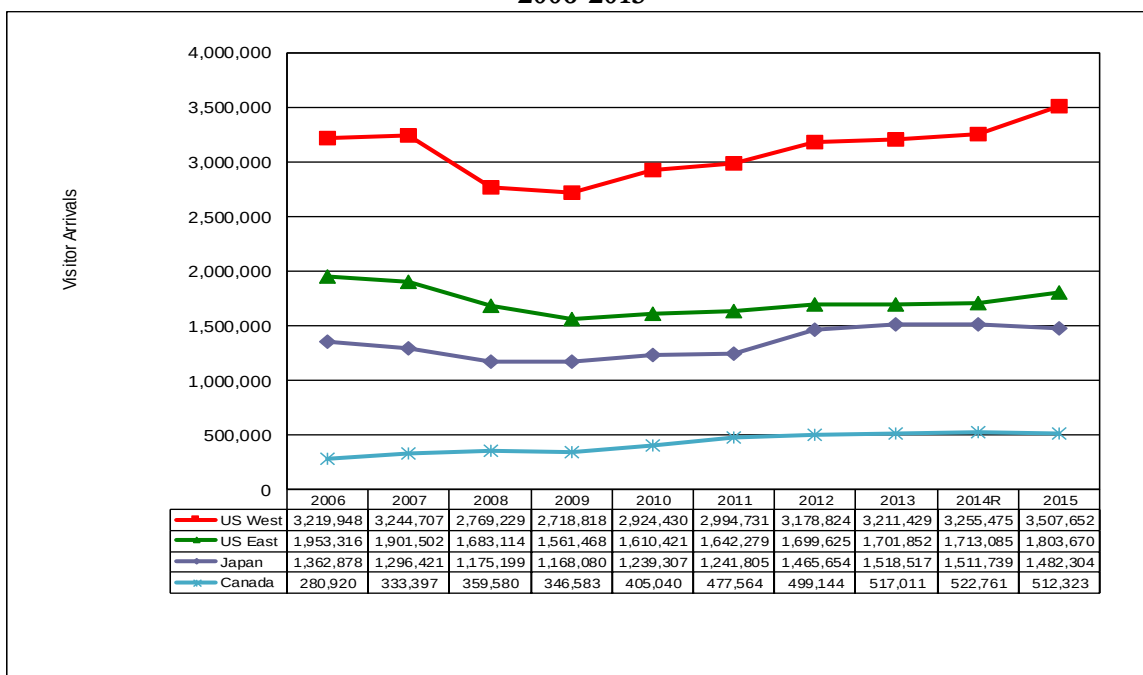


Figure 4: Visitor Arrivals from Four Largest Markets (by Air)
2006-2015



U.S. WEST

Air seat capacity from the U.S. West grew 8 percent to 7,217,348 seats in 2015 and comprised 60.5 percent of total air seats to the Hawaiian Islands, up from 59.2 percent in 2014 (table 94).

The U.S. West continued to be Hawai'i's largest market in terms of visitor expenditures, visitor days and visitor arrivals. In 2015, visitor expenditures gained 7 percent to \$5.3 billion. U.S. West air visitors' share of total visitor expenditures (34.9%) was up from 2014 (32.9%) (Figure 4, Tables 1).

- Daily spending was \$162 per person, up from \$160 last year (Figure 2, Table 71).
- U.S. West visitors spent more on lodging (\$76) but less on transportation (\$16) expenses compared to 2014. Spending on food and beverage (\$35), shopping (\$16) and entertainment and recreation (\$14) were about the same as last year.
- Arrivals rose 7.7 percent to 3,507,652 visitors. The average length of stay (9.28 days) was down from 2014 (9.45 days) resulting in only a 5.8 percent growth in visitor days (Figure 4 & Table 13).
- This market continued to have the highest percentage of repeat visitors (81.2%) among all the MMAs.
- True independent travelers comprised 80.9 percent of U.S. West visitors.
- Oahu hosted 43.5 percent of U.S. West visitors in 2015, 35.5 percent went to Maui, 18 percent went to Hawai'i Island and 17.2 percent went to Kaua'i. Arrivals to these four islands increased compared to 2014.
- These visitors stayed the longest on Hawai'i Island (8.84 days), followed by Maui (8.48 days) and Kaua'i (8.44 days).
- Close to half (49.7%) of U.S. West visitors stayed in hotels, 21.6 percent stayed in condominiums, 12.8 percent stayed in timeshares, 12 percent stayed with friends or relatives and 9.9 percent stayed in rental homes. More U.S. West visitors stayed in rental homes (+15%) and in bed and breakfast properties (+18.8%) compared to 2014. Stays in hotels (+6.8%), condominiums (+4.4%) and timeshares (+5%) also increased.
- More U.S. West visitors came to vacation (+9%) or to visit friends/relatives (+6.3%) but fewer came to get married (-13.2%), to honeymoon (-8.7%) or for meetings, convention and incentives (MCI) (-1.3%) compared to 2014.
- Over half (51.8%) of U.S. West visitors in 2015 were females. The largest age group was between 41 to 59 years old (30%), followed by 25 to 40 years old (25.1%) and those 60 years and older (20.1%) (Table 36).
- California continued to be the largest contributor with 1,987,085 visitors (+8.6%) in 2015. There were 489,806 visitors from Washington (+5.9%), 212,730 visitors from Oregon (+5.9%), 166,966 visitors from Arizona (+3.8%) and 148,652 visitors from Colorado (+8.6%) (Table 17).
- In terms of average daily census, June was the busiest month for U.S. West visitors in 2015, followed by July and December.

U.S. EAST

Air capacity from U.S. East rose 8.6 percent to 928,088 seats in 2015, and accounted for 7.8 percent of total air seats to Hawai'i, up from 7.6 percent last year (Table 94).

Expenditures by U.S. East visitors in 2015 of \$3.7 billion (+0.5%) was similar to 2014. U.S. East share of total visitor expenditures was 24.3 percent, slightly down from last year (24.4%). Daily spending by these visitors decreased to \$198 per person, from \$205 in 2014 (Figure 3, Tables 1).

- Lodging expenses dropped to \$87 per person in 2015 (Figure 2, Table 72).
- These visitors also spent less on food and beverage (\$40), transportation (\$20), entertainment and recreation (\$20) and shopping (\$19) than last year.
- Arrivals and visitor days increased 5.3 percent and 4.1 percent, respectively. Of the 1,803,670 U.S. East visitors in 2015, 59.1 percent were repeat visitors to Hawai'i (Figure 3, Table 15).
- Six out of ten U.S. East visitors went to O'ahu, 36.9 percent visited Maui, 22.2 percent visited Hawai'i Island and 19.1 percent visited Kaua'i. All four islands experienced growth in U.S. East visitors compared to 2014.
- U.S. East visitors stayed the longest on Maui (7.97 days) followed by Hawai'i Island (7.51 days) and O'ahu (7.17 days).
- Fewer U.S. East visitors came to get married (-17.9%) or to honeymoon (-4.2%), while more visitors came to visit with friends/relatives (+7.9%) and to vacation (+5.9%). MCI visitors from U.S. East rose slightly (+0.9%) from last year.
- In 2015, 77.6 percent of U.S. East visitors were true independent travelers, compared to 76.6 percent in 2014.
- The majority of U.S. East visitors stayed in hotels (60.9%), while some stayed in condominiums (14.7%), with friends or relatives (12.4%), in timeshares (10.4%) and in rental homes (8.3%). Usage of rental homes by U.S. East visitors rose 13.8 percent from 2014. More visitors also stayed in hotels (+4.3%), bed and breakfast properties (+3.3%) and condominiums (+2.6%).
- There were more female (51.1%) than male (48.9%) visitors in 2015. Those between 41 to 59 years old were the largest age group (32.2%), followed by those between the ages 25 to 40 (24.6%) and those 60 years and older (21.7%) (Table 36).
- There were more visitors from Texas (+6.4% to 256,030 visitors), Illinois (+6.6% to 133,422), New York (+2.8% to 126,932 visitors) and Florida (+8.1% to 107,362 visitors) compared to 2014 (Table 17).
- In 2015, June was the busiest month for U.S. East visitors based on average daily census, followed by January and July.

JAPAN

Air capacity from Japan dropped 3.3 percent to 1,949,420 seats. This represented 16.3 percent of total air seats to the islands in 2015, down from 17.8 percent in the previous year.

Japan continued to rank third in visitor expenditures, visitor days, and arrivals. However, devaluation of the yen to dollar exchange rates compared to 2014 impacted travel decisions and spending by Japanese visitors in Hawai'i.

Arrivals from Japan declined 1.9 percent to 1,482,304 visitors in 2015 while visitor days dropped slightly (-0.9%) compared to 2014. Combined with lower daily spending (\$236 per person, from \$273), visitor expenditures decreased 14.4 percent to \$2.1 billion. Japanese visitors' share of total expenditures of 13.6 percent was the lowest in the last ten years (Figure 3, Tables 1).

- Daily lodging expenses of \$79 were down from \$100 in 2014.
- Their daily shopping expenditures declined to \$66 per person (\$78 in 2014). However, Japanese visitors still spent nearly four times more per day than U.S. West, Canadian or European visitors.
- Their spending on food and beverage (\$50) was slightly lower than 2014 while spending on entertainment and recreation (\$19) and transportation (\$12) was about the same.
- Of the total Japanese visitors in 2015, 60.7 percent have been to Hawai'i before, compared to 58.5 percent in the previous year (Table 20).
- Nearly all Japanese visitors went to O'ahu (96.9%), 9.5 percent visited Hawai'i Island, 4 percent visited Maui and 1.7 percent visited Kaua'i. Japanese arrivals increased on Kaua'i (+7.8%) but declined on Hawai'i Island (-17.5%) and O'ahu (-2.2%) compared to 2014.
- Japanese visitors stayed the longest on O'ahu (5.50 days), followed by Hawai'i Island (3.60 days) and Maui (3.58 days).
- The majority of Japanese visitors came on packaged trips (68.4%) but this was down compared to 2014 (74.6%). True independent travelers (27.7%) comprised a higher percentage compared to 2014 (22.7%).
- While hotels remained the primary choice for lodging and were used by 84.4 percent of the Japanese visitors in 2015, stays in hotels declined from 2014 (-5.3%). Significantly more Japanese visitors stayed in timeshares (+27.6%), condominiums (+17.4%) and alternative accommodations including rental homes (+22.4%) and bed and breakfast properties (+64%).
- Noticeably more Japanese visitors came for MCI purposes (+52%) but fewer came to honeymoon (-13.9%), get married (-4.3%) and for vacation (-3%).
- There continued to be more female (57.7%) than male (42.3%) visitors from Japan. The largest age group was between 25 to 40 years old (37.3%). The second largest age group were those between 41 to 59 years (24.8%) followed by those over 60 years old (19.1%) (Table 36).
- Arrivals from Kanto (which includes Tokyo) continued to be the largest source of Japanese visitors to Hawai'i, dropped 8.5 percent to 600,388 visitors in 2015. Japanese arrivals from Chubu (-1.9% to 246,585) and Kyushu (-6% to 83,556) also decreased. However, there were more visitors from Kinki (+4.9% to 327,810), Tohoku (+10.7% to 61,520) and Hokkaido (+22.1% to 53,548) and Shikoku (+11.2% to 36,129) (Table 21).
- Based on average daily census, the busiest month for Japanese visitors in 2015 was August, followed by September and July.

CANADA

Air capacity from Canada rose 14.9 percent to 459,636 seats in 2015 with more seats to Honolulu (+22.7%), Kahului (+13.1%), Līhu‘e (+2.4%) and Kona (+1.6%). Canada seats comprised 3.9 percent of total air seats to the state in 2015, compared to 3.5 percent last year

Expenditures by Canadian visitors, Hawai‘i’s fourth largest visitor market, declined 1.9 percent to \$1.1 billion in 2015 and Canada’s share of total expenditures dropped slightly to 7 percent (7.2% in 2014). Arrivals dropped 2 percent to 512,323 visitors and visitor days decreased 3.4 percent. Visitors in 2015 spent more (\$162 per person) on a daily basis than last year (\$159 per person) (Figure 3, Table 1).

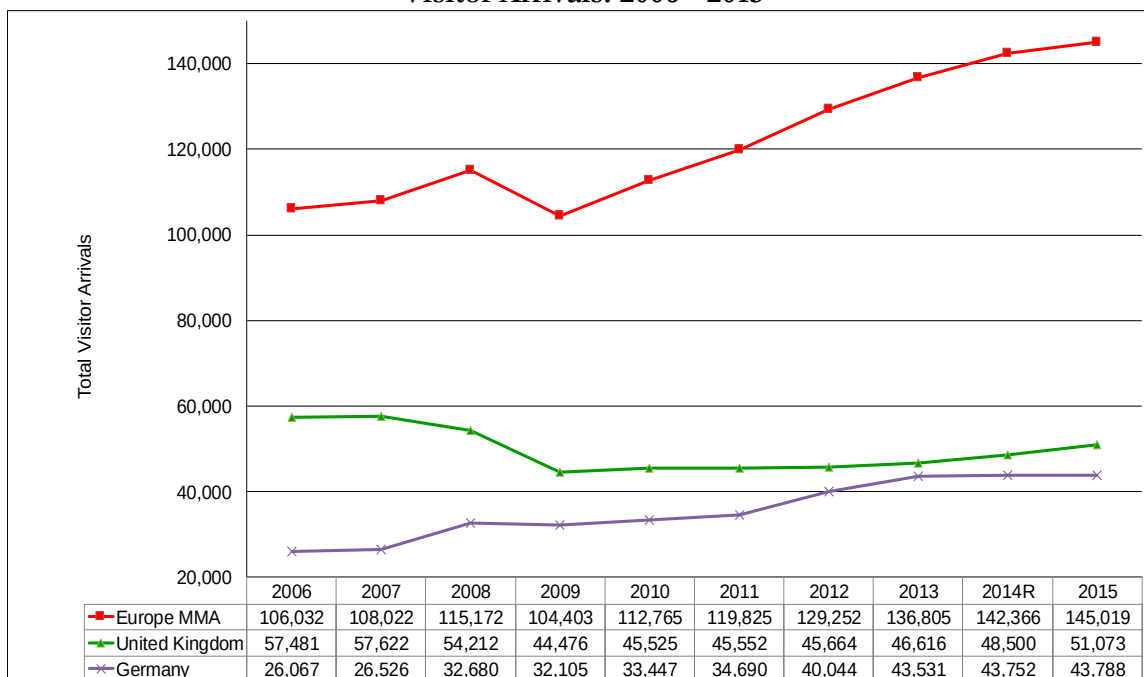
- Their lodging (\$78) and transportation (\$17) expenses were higher than 2014 but spending on shopping (\$15) declined. (Figure 2, Table 74)
- Seven out of ten Canadian visitors (68.1%) flew direct from Canada or from other international ports while the remainder arrived on flights from the U.S. mainland (Table 22).
- Repeat visitors comprised 66.2 percent of Canadian visitors in 2015.
- Direct air service contributed to more Canadians visiting to Maui (50.8% of Canadian visitors) than O‘ahu (40.7% of Canadian visitors).
- Canadian visitors spent the most time on Maui (11.12 days), then Hawai‘i Island (10.05 days) and Kaua‘i (8.98 days).
- A higher percentage of Canadian visitors were true independent travelers (79.1%) compared to 2014 (78%).
- Nearly half (43.7%) of Canadians visitors stayed in hotels, 38.5 percent stayed in condominiums, 11.4 percent stayed in rental homes, 10.6 percent stayed in timeshare properties and 5.2 percent stayed with friends or relatives. Stays in bed and breakfast properties (+18.4%), timeshares (+4.5%) and rental homes (+2.2%) increased, but usage of condominiums (-4.7%) and hotels (-4.6%) declined compared to 2014.
- More Canadian visitors came for MCI purposes (+7.4%) but fewer came to get married (-16.2%) and honeymoon (-2.3%) than last year.
- Those between 41 to 59 years old were the largest age group (32.5%) of Canadian visitors in 2015, followed by those between 25 to 40 years (23.6%) and over 60 years old (21.5%). There were more female (53.1%) than male (46.9%) Canadian visitors (Table 36).
- In 2015, the largest group of Canadian visitors was from British Columbia (42.7% or 218,632 visitors) followed by Alberta (22.7% or 116,169), Ontario (20.6% or 105,423), Quebec (6.3% or 32,236), Saskatchewan (2.9% or 14,985) and Manitoba (2.4% or 12,347) (Table 23).
- January was the busiest month in 2015, followed by March and February.

EUROPE

Total visitor spending by Europe MMA of \$337.2 million (-0.6%) was a marginal decline from 2014. Arrivals increased 1.9 percent to 145,019 visitors. However, daily spending (\$178 per person) was lower compared to 2014 (\$182) (Table 1).

- These visitors spent less on lodging (\$77), food and beverage (\$35) and entertainment and recreation (\$16) but more on transportation (\$27) compared to 2014 (Table 75).
- There were more visitors from United Kingdom (+5.3%), and Switzerland (+3.1%) but fewer visitors from France (-1.4%) and Italy (-1.4%) compared to 2014 (Table 11 and Table 12).
- The majority of European visitors (80.1%) came on domestic flights (Table 24).
- The largest age group for European visitors was between 25 to 40 years (30.5%), followed by those 41 to 59 years (29.5%) and those over 60 years old (17%). Over half (52.3%) of the visitors were females (Table 36).
- August, July and September were the busiest months for European visitors in 2015.

**Figure 5: Europe MMA, UK & Germany
Visitor Arrivals: 2006 - 2015**



Visitors from United Kingdom

Visitors from the United Kingdom (U.K.) accounted for the largest share (35.2%) of the European market with 51,073 visitors, up 5.3 percent from 2014 (Table 11 and Table 12).

- Two out of three U.K. visitors in 2015 were first timers (65%) similar to last year (Table 25).
- Seven out of ten U.K. arrivals visited O'ahu (72.3%), 33.5 percent visited Maui, 26 visited Hawai'i Island and 14.6 percent visited Kaua'i.
- U.K. visitors stayed the longest on Maui (7.72 days), followed by O'ahu (7.43 days) and Hawai'i Island (7.36 days).
- There were more true independent travelers (58.3%) from the U.K. compared to 2014 (56.3%).

- The majority of U.K. visitors stayed in hotels (72.9%). Some stayed in condominiums (11.2%), rental homes (9%), with friends or relatives (7.7%), or in timeshare properties (3.9%).
- Stays in rental homes (+27.8%) rose significantly and usage of condominiums (+11.6%) and hotels (+6.3%) also increased.
- More U.K. visitors came MCI purposes (+22.1%), to honeymoon (+11.5%) or to vacation (+7%) compared to last year.

Visitors from Germany

- Germany accounted for second largest share of European visitors at 30.2 percent. Arrivals from Germany of 43,788 visitors (+0.1%) were comparable to 2014 (Table 11 and Table 12). These visitors stayed an average 14.59 days in 2015, the longest among all visitor groups.
- Seven out of ten were first-time visitors (70.8%) (Table 26).
- The majority of German visitors went to O‘ahu (70%), 48.4 percent went to Maui, 41.7 percent went to Hawai‘i Island and 31.6 percent went to Kaua‘i.
- The average length of stay was the longest on Hawai‘i Island (8.06 days), followed by Maui (8.03 days) and O‘ahu (7.38 days).
- A greater percentage of German visitors were true independent travelers (68.9%) compared to the previous year (66.3%).
- Two out of three German visitors stayed in hotels (66.6%), some stayed in rental homes (11.4%), condominiums (10.9%), with friends or relatives (9.1%) or in bed and breakfast properties (8.9%). Usage of condominiums (+19.3%) increased but stays in hotels (-6.7%) declined from 2014.
- More German visitors in 2015 came to vacation (+2.4%) but fewer came to honeymoon (-19.3%) or for MCI purposes (-5.5%) than in the prior year.

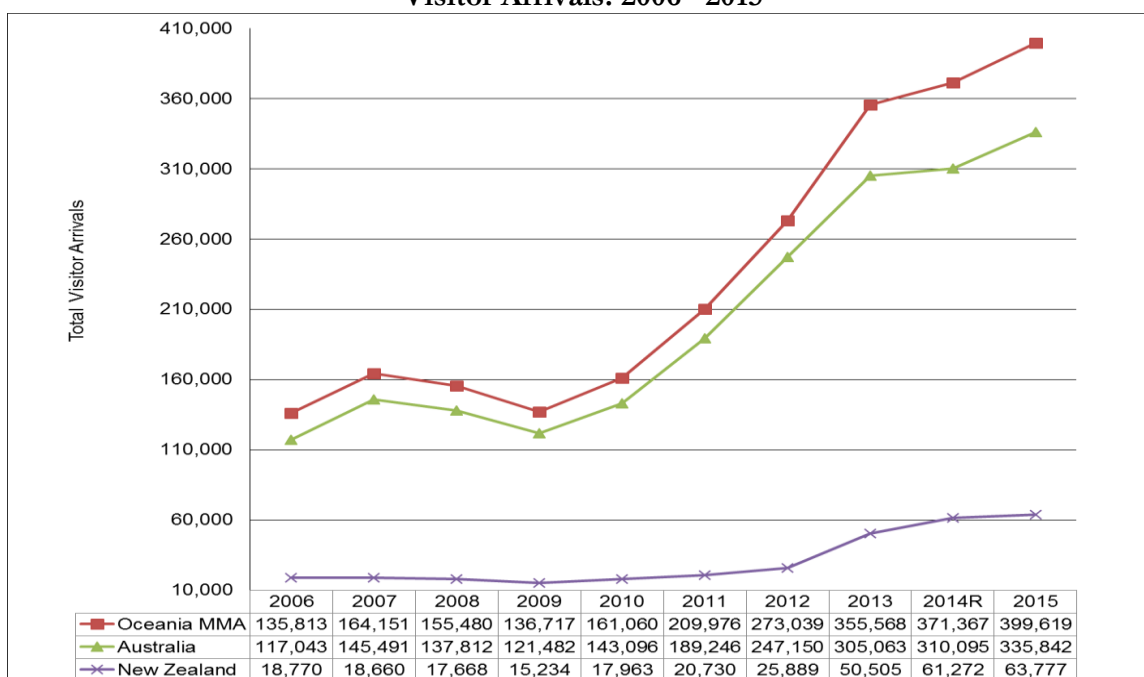
OCEANIA

Air capacity jumped 16.4 percent from 2014 to 503,300 seats. Seats from Brisbane near doubled, in addition to growth from Melbourne and Sydney Australia. Seats from Auckland New Zealand also increased (+3.5%) compared to 2014. Oceania seats comprised 4.2 percent of total air capacity, up from 3.8 percent from a year ago.

Total expenditures by visitors from Oceania MMA jumped 12 percent to \$1.0 billion in 2015, boosted by growth in arrivals (+7.6% to 399,619 visitors) and higher daily spending (+1.6% to \$263 per person) compared to last year. (Figure 6, Table 1)

- These visitors spent more on lodging (\$104), food and beverage (\$50), and entertainment and recreation but shopping expenses (\$54) declined (Table 76).
- Visitors from Australia accounted for 84 percent of all visitors from Oceania, while 16 percent were from New Zealand (Table 11).
- Those between 41 to 59 years old (31%), between 25 to 40 years (27.1%) and those over 60 years old (17.2%) were the three largest age groups from Oceania. Over half (56.1%) of the visitors were females (Table 36)
- September was the busiest month for visitors from Oceania in 2015, followed by October and June.

**Figure 6: Oceania MMA
Visitor Arrivals: 2006– 2015**



Visitors from Australia

- Arrivals from Australia increased 8.3 percent to 335,842 visitors in 2015 (Table 28). These visitors stayed an average 9.53 days.
- Their daily spending of \$264 per person was lower compared to 2014 (\$270) (Table 83).
- Their lodging expenses (\$99) increased but shopping expenditures (\$58) were down.
- Most Australian visitors went to O‘ahu (97.1%) while 18.4 percent went to Maui, 14.9 went to Hawai‘i Island and 8.6 percent went to Kaua‘i (Table 28).
- These visitors spent the most time on O‘ahu (8.04 days), followed by Maui (4.39 days) and Hawai‘i Island (3.85 days).
- Over half Australian visitors in 2015 were first-timers (54.9%).
- A higher percentage of Australian visitors (60%) were true independent travelers compared to 2014 (51.5%)
- Most Australian visitors in 2014 stayed in hotels (88.6%), some stayed in condominium properties (8.8%) and rental homes (4.8%). Usage of rental homes (+55.7%) and condominiums (+34.5%) were significantly higher than in 2014.
- More Australian visitors came to vacation (+7.5%) and for MCI purposes (+44%) but fewer came to honeymoon (-8.1%) than in the previous year.

Visitors from New Zealand

- Arrivals from New Zealand rose 4.1 percent to 63,777 visitors in 2015 (Table 29). The average length of stay was 9.54 days, compared to 9.15 days in 2014.
- Daily spending by these visitors increased to \$227 from \$220 in 2014 (Table 84).
- These visitors spent more on lodging (\$86) and food and beverage (\$47). Spending on shopping (\$55) and entertainment and recreation (\$19) were similar to last year.

- Half of the visitors from New Zealand in 2015 were first-timers (50.5%) (Table 29).
- Most New Zealand visitors went to O‘ahu (95.1%), 18 percent went to Maui, 13.6 went to Hawai‘i Island and 6.6 percent went to Kaua‘i.
- These visitors spent the most time on O‘ahu (7.99 days), followed by Maui (5.61 days) and Hawai‘i Island (4.53 days).
- There were more true independent travelers (62.2%) from New Zealand compared to 2014 (54.4%).

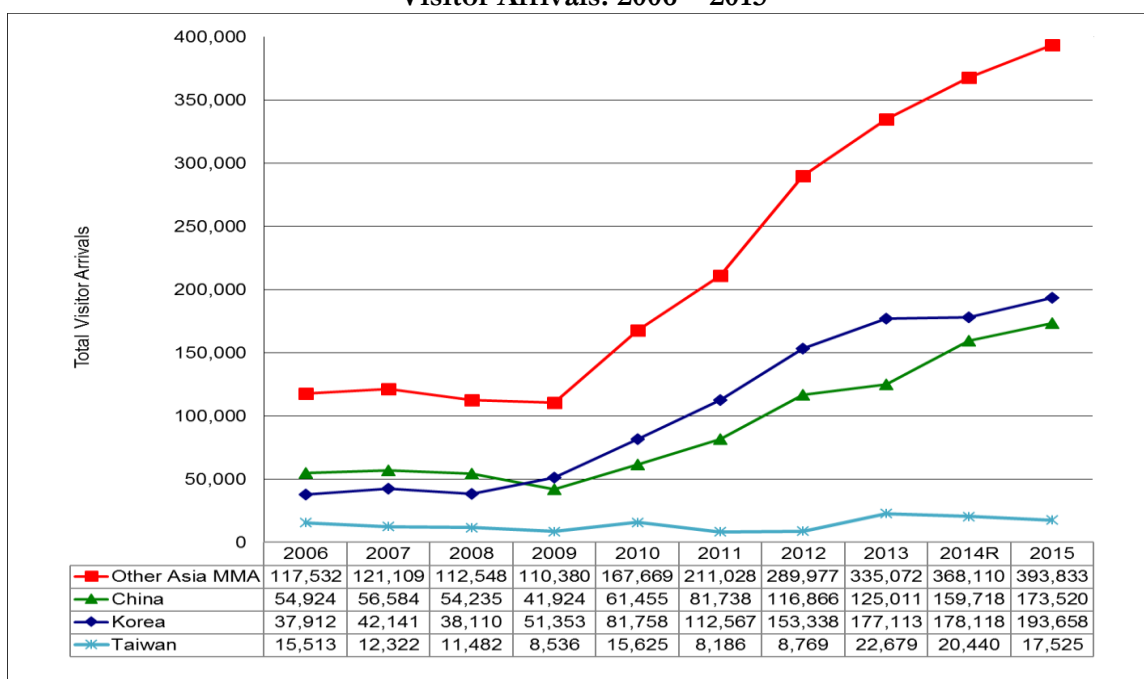
OTHER ASIA

Air capacity from Other Asia decreased 7.3 percent to 479,662 seats, as a result of reduced service from Taipei (-29.8%) and Seoul (-10.9%). Total seats from China increased 8.6 percent with more seats out of Beijing offsetting fewer seats from Shanghai. Other Asia seats accounted for 4 percent of total air seats in 2015, down from 4.6 percent in the previous year.

Expenditures by visitors from Other Asia gained 12.1 percent from 2014 to \$903.9 million. Arrivals rose 7 percent to 393,833 visitors and visitor days increased 5.6 percent (Figure 7, Table 1). Daily per person spending of \$340 was also higher than last year (\$321).

- These visitors spent more on lodging (\$90), food and beverage (\$61), entertainment and recreation expenses (\$30) and transportation (\$29) while shopping expenses were unchanged from 2014 (\$117) (Table 77).
- Eight out of ten (83.2%) visitors from Other Asia flew directly from international airports while the remainder arrived via U.S. mainland airports (Table 30).

**Figure 7: Other Asia MMA
Visitor Arrivals: 2006 – 2015**



- The largest age group for visitors from Other Asia was those 25 to 40 years old (51.7%), followed by those between 41 to 59 years (24.4%) and those over 60 years old (10.1%). There were more female (53.7%) than male (46.3%) visitors from this market in 2015 (Table 36).
- Visitors from Korea (49.2%) and China (44.1%) accounted for the two largest shares of total visitors from Other Asia (Table 11).
- In 2015, February was the busiest month for visitors from Other Asia, followed by December and July.

Visitors from Korea

- Arrivals from Korea rose 8.7 percent to 193,658 visitors and visitor days increased 9 percent compared to 2014 (Table 31).
- These visitors spent \$294 per person on a daily basis, up from \$270 last year (Table 81).
- Lodging, the largest expense, rose to \$94 from \$87 in 2014.
- Their spending on shopping (\$77), food and beverage (\$67) and transportation (\$26) also increased while entertainment and recreation expenses were similar to the prior year.
- Among Korean visitors in 2014, 82.6 percent were first-time visitors (Table 31).
- Nearly all Korean visitors went to O'ahu (97.7%), 22.7 percent went to Maui, 8 went to Hawai'i Island and 3.8 percent went to Kaua'i.
- The average length of stay was the longest on O'ahu (6.05 days), followed by Hawai'i Island (4.34 days) and Maui (2.61 days).
- A lower percentage of Korean visitors in 2015 were true independent travelers (38.5%), compared to 2014 (39.6%).
- In 2015, most Korean visitors stayed in hotels (91.8%), some stayed in condominium properties (5.9%), in rental homes (2.8%) or with friends or relatives (2.6%).
- The number of Korean visitors who came to get married tripled compared to 2014 (5,719 from 1,713). Korean honeymoon visitors also grew by double digits (+24.1%). There were also more Korean visitors who came for MCI purposes (+10.5%) than in 2014.

Visitors from China

- Arrivals from China grew 8.6 to 173,520 visitors in 2015. Visitor days rose 6.8 percent (Table 32).
- Although daily spending by Chinese visitors of \$392 per person was lower than 2014 (\$397) it continued to be the highest among all visitor groups (Table 80).
- Chinese visitors continued to spend twice as much on shopping compared to their Japanese counterparts even though their shopping expenses (\$160) decreased from 2014 (\$183).
- This group spent more on food and beverage (\$56), entertainment and recreation (\$35) and transportation (\$33) while lodging expenses (\$86) were similar last year.
- Eight out of ten Chinese visitors in 2015, were first-time visitors (84.2%) to Hawai'i (Table 32).
- Most Chinese visitors went to O'ahu (95.5%), 26.1 percent went to Hawai'i Island, 16.1 percent went to Maui and 2.9 percent went to Kaua'i.
- These visitors stayed the longest on O'ahu (5.07 days), followed by Kaua'i (3.43 days) and Maui (3.29 days).
- While the majority of Chinese visitors continued to purchase packaged trips and group tours, there was a higher percentage of true independent travelers (27%) in 2015 than in the prior year (26.1%).
- Nearly all Chinese visitors stayed in hotels (91.3%), a few stayed in condominium properties (8.1%), in rental homes (2.7%) or with friends or relatives (1.8%).

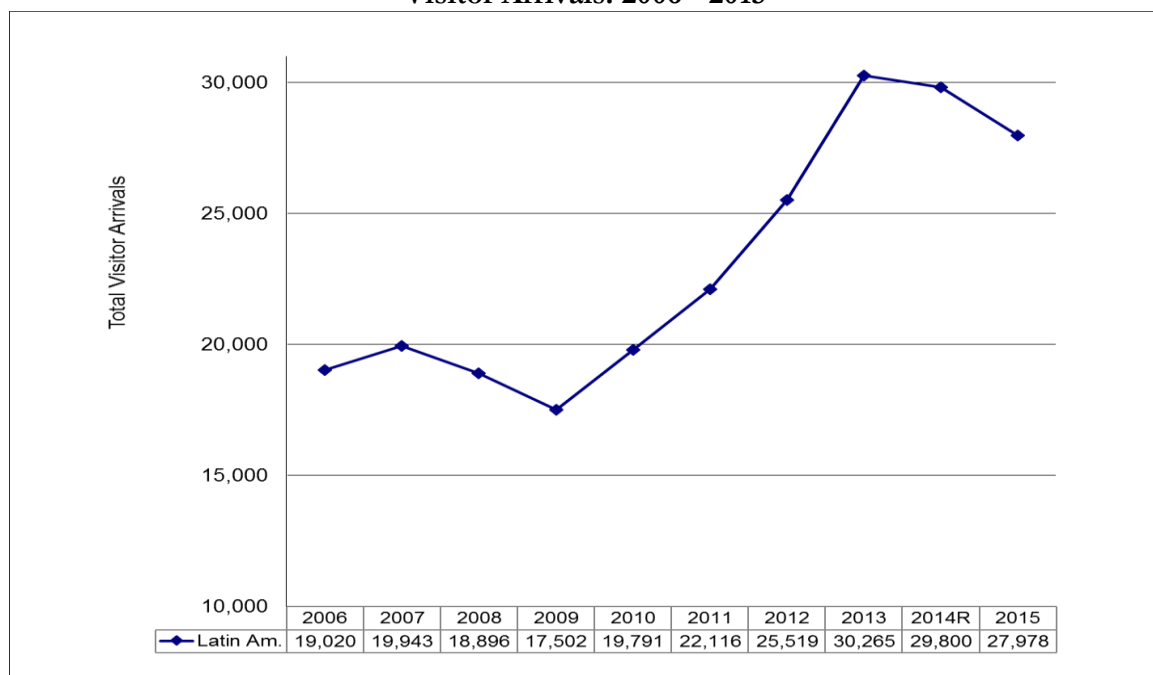
Visitors from Taiwan

- Arrivals from Taiwan decreased 14.3 percent to 17,525 visitors in 2015. A shorter length of stay (-3.8% to 7.96 days) led to a further decline in visitor days (-17.6%) (Table 33).
- These visitors spent more on a daily basis (\$222 per person) compared to 2014 (\$204) (Table 82).
- Lodging, their largest expense, increased to \$67 from \$60 in 2014.
- Their spending on food and beverage (\$43), entertainment and recreation (\$22) and transportation (\$24) also increased but shopping expenses (\$59) declined from last year.
- Six out of ten Taiwanese visitors in 2015 were first timers (61%) to Hawai'i. Over half made their own travel arrangements (54.5%).
- Most of the Taiwanese visitors went to O'ahu (93.8%), 31.3 percent went to Hawai'i Island, 21.6 percent went to Maui and 7.3 percent went to Kaua'i.
- The majority of Taiwanese visitors stayed in hotels (71.8%), some stayed in condominium properties (10.1%), with friends or relatives (9.6%) or in rental homes (8.1%).

LATIN AMERICA

Total expenditures by visitors from Latin America MMA declined 14.6 percent to \$79.8 million. Arrivals dropped 6.1 percent to 27,978 visitors while visitor days decreased 7 percent from 2014. Daily spending (\$247 per person) were also lower compared to the previous year (\$269) (Figure 8, Table 1).

Figure 8: Latin America MMA
Visitor Arrivals: 2006 - 2015



- These visitors spent less on lodging (\$96) and shopping (\$29), but more on food and beverage (\$49) and entertainment and recreation (\$26) (Table 78).
- Visitors from Brazil comprised 46.3 percent of Latin America MMA in 2015, followed by visitors from Mexico (35.7%) and Argentina (18%) (Table 11).

- First-timers accounted for 69.9 percent of Latin American visitors compared to 70.8 percent in 2014 (Table 34).
- A higher percentage of Latin American visitors were true independent travelers (63.2%) compared to 2014 (59.9%).
- Eight out of ten visitors from this market went to O‘ahu (77%), 37.3 percent went to Maui, 24 percent went to Hawai‘i Island and 13.8 percent went to Kaua‘i.
- The majority stayed in hotels (71.3%), 9.1 percent stayed in rental homes, 8.2 percent stayed with friends or relatives, and 6.2 percent stayed in condominium properties.
- The largest age group for visitors from Latin America was those 25 to 40 years old (35.6%), followed by those between 41 to 59 years (28.2%) and those over 60 years old (11.3%). There were more male (52%) than female (48%) visitors in 2014 (Table 36).

AIR VISITORS (BY SEGMENT)

TRAVEL METHODS

- A higher percentage of total air visitors in 2015 were true independent travelers (67.2%) compared to the previous year (64.9%) (Tables 2 and 3).
- True independent travelers comprised the majority of the visitors from U.S. West (80.9%), U.S. East (77.6%), Canada (79.1%), Europe (64.9%), Latin America (63.2%), New Zealand (62.2%) and Australia (60%) and about half of the visitors from Taiwan (54.5%).
- A smaller percentage of Korean (38.5%), Japanese (27.7%) and Chinese (27%) visitors in 2015 made their own travel arrangements. Most of these visitors purchased group tours or packaged trips.
- Japanese visitors who came on group tours in 2015 spent \$248 per person. Daily spending by group tour visitors from U.S. East and U.S. West was \$253 and \$231, respectively (Table 87).
- In comparison, Japanese (\$233), U.S. East (\$188) and U.S. West (\$160) visitors who made their own travel arrangements spent less.

PURPOSE OF TRIP

Honeymoon

In 2015, 588,236 visitors came to honeymoon in the islands, down 6.9 percent from last year. Honeymooners accounted for 6.9 percent of total air visitors to Hawai‘i compared to 7.7 percent in 2014 (Tables 2 and 37).

- The largest percentage of honeymoon visitors continued to be from Japan (38.6%) and the second largest share was from U.S. West (18.5%). Honeymoon visitors from Korea (+24.1%) rose significantly in 2015 boosting the Korean market’s share of this segment to 15.1 percent, tied with U.S. East (15.1%).
- Honeymoon visitors stayed an average 7.47 days in 2015.
- Seven out of ten (73.9%) honeymooners were first-time visitors to the state.
- Over half purchased packaged trips (63.8%), while 7.1 percent purchased group tours. Only 35.8 percent made their own arrangements.

- The majority visited O‘ahu (78.4%), 26 percent visited Maui, 13.1 percent visited Hawai‘i Island and 11.3 percent visited Kaua‘i.
- Nine out of ten honeymooners stayed in hotels (87.6%). Some visitors also stayed in condominiums (7.3%), timeshare properties (3.8%), and rental homes (3.6%).
- Daily spending by Japanese honeymoon visitors was \$323 in 2015 (\$354 in 2014). U.S. East honeymoon visitors spent \$280 (\$308 in 2014) while U.S. West honeymooners spent \$211 (\$222 in 2014) (Table 87).

Get Married

There were 109,921 visitors who came to get married in 2015, 7.7 percent fewer than a year ago. This segment comprised 1.3 percent of total air visitors to the state (Tables 2 and 38).

- Japanese visitors accounted for 36.8 percent of visitors who came to get married, up from 2014 (35.5%). Korean visitors who came to get married tripled from last year, elevating Korean’s share of this segment to 5.2 percent from 1.4 percent in 2014. In contrast, shares of U.S. West (31.3%, 33.3% in 2014), U.S. East (15.7%, 17.7% in 2014), and Canadian (3.5%, 3.8% in 2013) visitors declined.
- In 2015, 50.5 percent of those who came to get married were repeat visitors to the islands.
- Over half (51%) of those who came to get married made their own travel arrangements, 48.2 percent purchased packaged trips and 8.9 percent purchased group tours.
- The average travel party size was 2.27 people, similar to 2014
- Seven out of ten (70.1%) visitors from this segment went to O‘ahu, 26.8 percent visited Maui, 13.5 percent visited Hawai‘i Island and 11.6 percent visited Kaua‘i.
- The average length of stay dropped to 8.53 days, from 8.71 days in 2014.
The majority (75.4%) stayed in hotels, 14.1 percent stayed in condominiums, 9.8 percent stayed in rental homes, and 4.8 percent stayed in timeshare properties.

Meetings, Conventions and Incentives (MCI)

A total of 498,771 visitors came for meetings, conventions and incentives, an increase of 8.4 percent from 2014 (Table 39). The average length of stay was 7.54 days. MCI visitors accounted for 5.8 percent of total air visitors in 2015, up slightly from 5.6 percent last year (Tables 2 and 39).

- Visitors from U.S. West (29.8% from 32.7% in 2014) and U.S. East (29.2% from 31.3% in 2014) accounted for the two largest shares of MCI visitors though their shares declined compared to 2014. For the Japanese market, strong growth in incentive visitors and double the number of convention visitors boosted the share of this segment to 22.4 percent from 15.9 percent in 2014.
- Two out of three (65.4%) MCI visitors have been to the islands before.
- More than half (54.6%) of MCI visitors made their own travel arrangements rather than purchasing packaged trips (36.2%) or group tours (31.2%).
- The majority MCI visitors went to O‘ahu (61.7%), 29.7 percent visited Maui, 18.2 percent visited Hawai‘i Island and 10.6 percent visited Kaua‘i.
- Most MCI visitors stayed in hotels (88.7%) while 8.1 percent stayed in condominiums.
- MCI visitors from Japan (\$251), U.S. East (\$238) and U.S. West (\$205) spent more than Japanese (\$217), U.S. East (\$193) and U.S. West (\$163) pleasure visitors (Table 87).

Visiting Friends or Relatives

There were 717,411 visitors who came to see friends or relatives, an increase of 5.8 percent from 2014 (Table 40). These visitors comprised 8.4 percent of all visitors to Hawai'i. The average length of stay was slightly shorter (11.61 days) compared to 2014 (11.78 days). (Tables 2 and 40).

- U.S. West had the largest share of this segment (54.8%) followed by U.S. East (30.3%) Japan (3.2%) and Canada (2.8%).
- Eight out of ten visitors (79.5%) from this segment were repeat visitors to Hawai'i.
- Most of the visitors made their own travel arrangements (90.2%).
- The majority visited O'ahu (69.9%), 19.3 percent visited Maui, 18.9 percent visited Hawai'i Island and 10.7 percent visited Kaua'i.
- The average party size was 1.76 persons, similar to 2014.
- Six out of ten (61.1%) visitors stayed with friends or relatives, 27.1 percent stayed in hotels, 10.8 percent stayed in condominiums, 8.3 percent stayed in rental homes, and 4.6 percent stayed in timeshare properties. More visitors used rental homes (+14.9%) compared to 2014.

FAMILY VISITORS

In 2015, there were 2,228,799 visitors who came with children 17 years and under (family visitors), which was an increase of 14 percent from the previous year (Table 41). This group accounted for 26 percent of air visitors up from 23.9 percent in 2014.

- The majority (71%) of visitors have been to Hawai'i before (70.5% in 2014).
- Many family visitors made their own travel arrangements (69.6%) rather than purchasing group tours (5.9%) or packaged trips (29.3%).
- Six out of ten family visitors (62%) were on O'ahu, 28.7 percent went to Maui, 16 percent went to Hawai'i Island and 12 percent went to Kaua'i.
- The average party size was 3.85 persons, similar to 2014.
- Six out of ten visitors stayed in hotels, 20.1 percent stayed in condominiums, 10.5 percent were in timeshares, 8.9 percent stayed in rental homes and 6.5 percent stayed with friends or relatives.
- More family visitors stayed in rental homes (+21.8%), in bed and breakfasts (+18%) or with friends and relatives (+18.7%) compared to 2014.

ACCOMMODATIONS

The majority of air visitors in 2015 stayed in hotels (62.2%) but the share was lower compared to 2014 (63.6%). Condominiums (17.6%) were the second most popular choice for lodging followed by timeshare properties (9.4%), friends or relatives (8.9%) and rental homes (7.4%). Usage of alternative accommodations continued to gain popularity with visitors. In 2015 stays in rental homes (+14.8%) and bed and breakfast properties (+15.4%) rose significantly compared to last year. Stays with friends or relatives (+7.6%), in timeshares (+6.2%), condominiums (+4.9%) and hotels (+2%) also increased but not as robustly. (Table 2).

- Typically, U.S. West, U.S. East and Japanese air visitors who stayed in hotels spent more per person per day than those who stayed in condominiums, timeshare properties or with friends and relatives (Table 87).
- In 2015, Japanese air visitors who stayed in hotels spent \$258 per day, compared to U.S. East visitors at \$243 and U.S. West visitors at \$205 (Table 87).
- Japanese visitors who stayed in condominiums spent \$174 daily. U.S. East and U.S. West visitors who stayed in condominiums spent \$183 and \$161, respectively.
- Visitors from Japan who used timeshare properties spent \$128. U.S. East timeshare visitors spent \$149 per person, while U.S. West timeshare visitors spent \$129 per person.

Hotel-Only

In 2015, there were 4,656,465 visitors who stayed exclusively in hotels, which was an increase of 1.8 percent from last year. The average length of stay was 7.19 days. Hotel-only visitors (54.4%) comprised a lower percentage of total air visitors to Hawai'i than in 2014 (55.8%) (Table 42).

- The majority (72%) came for a vacation, 10.3 percent came to honeymoon, 8.7 percent came for MCI purposes and 2.6 percent came to visit friends or relatives.
- Repeat visitors accounted for 57.9 percent of hotel-only visitors in 2015, up from 56.8 percent last year.
- Half of hotel-only visitors made their own arrangements (50.3%) while 47.6 percent purchased packages.
- O'ahu had the most number of hotel-only visitors at 74.5 percent, followed by Maui with 23.2 percent, Hawai'i Island with 13.7 percent and Kaua'i with 8.1 percent.

Condo-Only

The number of visitors who stayed entirely in condominiums rose 5.6 percent from 2014. These 1,180,114 visitors stayed an average of 11.25 days in 2015, much higher than visitors who used only hotels (Table 43).

- The majority of these visitors had been to Hawai'i before (79.7%) with an average of 6.62 trips to the islands.
- Eight out of ten visitors (83.9%) were true independent travelers.
- The majority of these visitors (89.8%) came for a vacation, 4.2 percent came to visit friends or relatives, 2.4 percent came to honeymoon and 1.9 percent came for meetings, conventions and incentives.
- Maui had the largest share of condo-only visitors at 49 percent, followed by O'ahu (31.3%), Hawai'i Island (15%) and Kaua'i (14.8%).

Timeshare-Only

There were 626,356 visitors who stayed exclusively in timeshare properties in 2015, up 7.5 percent from last year. Their average length of stay was 9.85 days (Table 44).

- Most of these visitors (94.5%) came for a vacation, 2.9 percent came to visit friends or relatives, and 2.5 percent came to honeymoon.
- Most were true independent travelers (91.3%) and 84 percent were repeat visitors to Hawai'i.
- Maui had a 35.9 percent share of timeshare-only visitors, followed by O'ahu with 34.6 percent, Kaua'i with 25.5 percent, and Hawai'i Island's with 17.4 percent.

Rental Home-Only

The number of visitors who stayed exclusively to rental homes climbed 17.3 percent from 2014. These 448,519 visitors stayed an average of 10.82 days in 2015 (11.36 days in 2014) (Table 45).

- Seven out of ten were repeat visitors to the state. Most were true independent travelers (92.8%).
- The majority (85.4%) came for a vacation, 8 percent came to visit friends or relatives, and 2.5 percent came to honeymoon.
- O'ahu had largest percentage of rental home-only visitors (43.6%), followed by Hawai'i Island (23.7%), Kaua'i (22.8%) and Maui (21.6%).

Bed & Breakfast-Only

There were 28,939 visitors who stayed entirely in bed and breakfast properties, which was a 24.6 percent jump from 2014. Their average length of stay was 9.91 days (10.23 days in 2014) (Table 46).

- Over half of them were repeat visitors (54.1%) to Hawai'i, while most (88.1%) were true independent travelers.
- Three out of four (75.3%) came for a vacation, 10 percent came to visit friends or relatives, and 7.7 percent came to honeymoon.
- O'ahu had the highest share of bed & breakfast-only visitors at 48.3 percent, followed by Maui with 29.9 percent, Hawai'i Island with 29.6 percent and Kaua'i with 16.6 percent.

FIRST-TIME/REPEAT VISITORS

First-Time Visitors

Among total air arrivals in 2015, 34.4 percent or 2,944,886 visitors came for the first-time, up 2 percent from last year. Their average length of stay was 8.27 days (Table 47).

- First-time visitors comprised 18.8 percent of U.S. West, 40.9 percent of U.S. East, 39.3 percent of Japanese and 33.8 percent of Canadian visitors in 2015. In contrast, first-timers accounted for the majority of visitors from the emerging markets: Other Asia (81.5%), Latin America (69.9%), Europe (68.9%), and Oceania (54.2%).
- The majority of domestic first-time visitors (66.6%) made their own travel arrangements while only 35 percent of international first-time visitors were independent travelers.
- Three out of four (74.9%) first-time visitors stayed in hotels, 11.3 percent stayed in condominiums, 6.7 percent stayed in rental homes, 5.8 percent stayed with friends or relatives, and 4.6 percent stayed in timeshare. More first time visitors used rental homes (+18.9%) and bed and breakfast properties (+14.3%) than in 2014.
- The majority of first-time visitors went to O‘ahu (75.6%), followed by Maui (27.6%), Hawai‘i Island (18.1%) and Kaua‘i (11.9%).
- Seven out of ten (71%) came to vacation, 14.8 percent came to honeymoon, 5.9 percent came for meetings, conventions and incentives and 5 percent came to see friends and relatives.
- First-time visitors from the top three MMAs (U.S. West, U.S. East and Japan) in 2015 spent more on a daily basis than those who have been to Hawai‘i before (Table 87).
- Japanese first-time visitors spent \$260 per person, compared to \$223 by repeat Japanese visitors.
- U.S. East first-time visitors spent \$207, while repeat visitors spent \$190.
- U.S. West first-time visitors spent \$169 versus \$161 for repeat visitors.

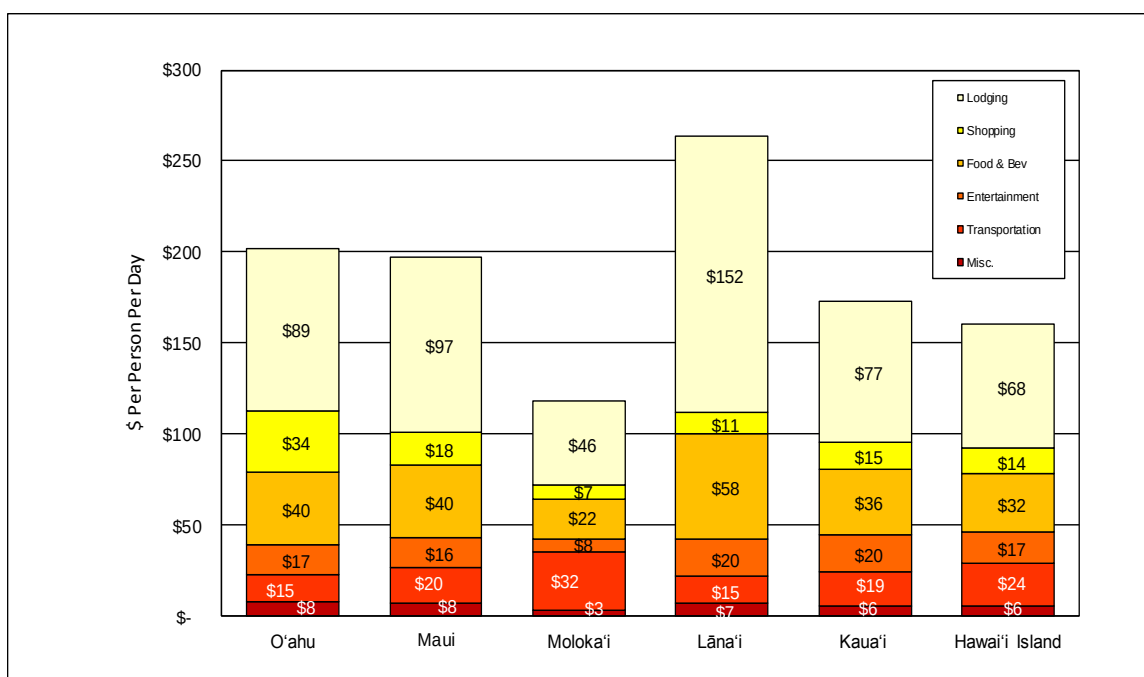
Repeat Visitors

There were 5,618,132 visitors in 2015 who have been to Hawai‘i before, which was a 5.8 percent growth from a year ago. Repeat visitors accounted for 65.6 percent of air visitors to the state. Their average length of stay was 9.56 days (Table 48).

- The largest percentage of repeat visitors in 2015 continued to be from U.S. West (81.2%), followed by Canada (66.2%), Japan (60.7%) and U.S. East (59.1%).
- Three out of four repeat visitors (74.7%) made their own travel arrangements.
- The average number of trips for a repeat visitor was 7.20 trips, similar to 2014.
- More than half (55.5%) of repeat visitors stayed in hotels, 20.9 percent stayed in condominiums, 12 percent stayed in timeshares, 10.6 percent stayed with friends or relatives and 7.8 percent stayed in rental homes. Usage of rental homes (+13.1%) was much higher compared to 2014.
- Over half (55.4%) of all repeat visitors in 2015 went to O‘ahu, 30.7 percent visited Maui, 17.5 percent went to Hawai‘i Island and 14.7 percent went to Kaua‘i.
- The majority of repeat visitors (79.1%) came for vacation, 10.2 percent visited friends or relatives, and 5.8 percent came for meetings, conventions, and incentives.

AIR VISITORS (BY ISLANDS)

Figure 9: 2015 Visitor Personal Daily Spending by Category and Island

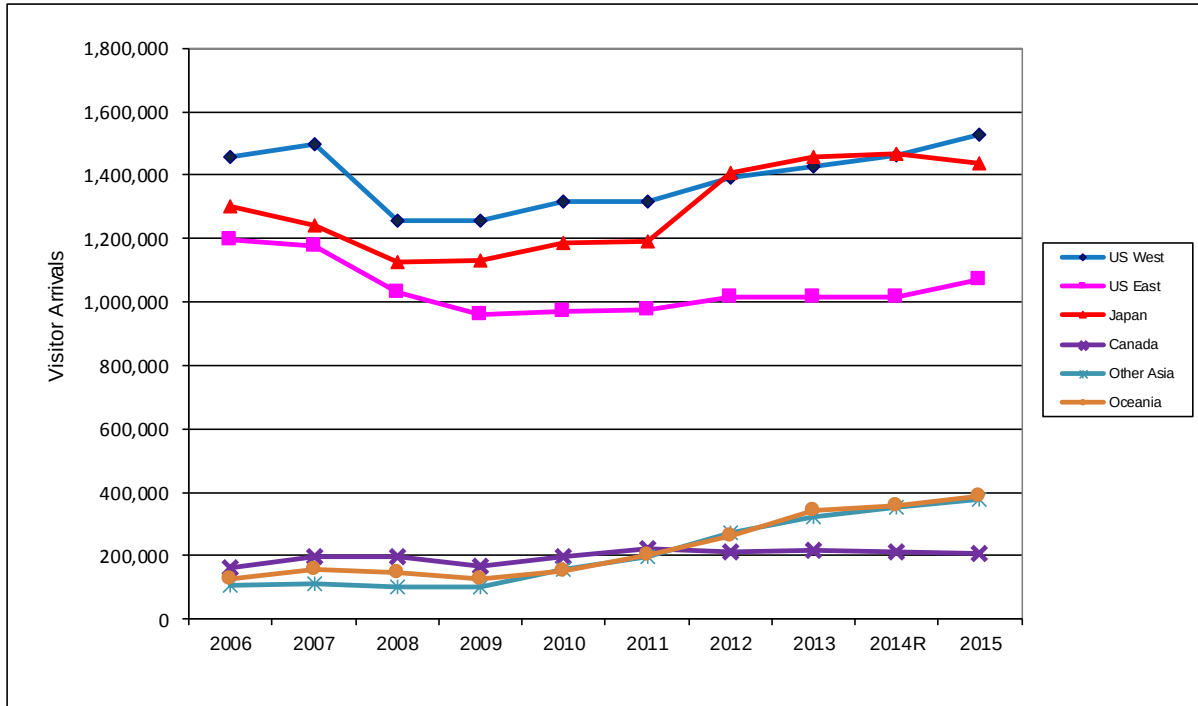


O'AHU

Of the \$14.98 billion in total expenditures by air visitors in 2015, \$7.4 billion (-0.1%) were spent on O'ahu, similar to a year ago. Arrivals by air to O'ahu rose 2.8 percent to 5,339,912 visitors and visitor days increased 3.5 percent from 2014. However, daily spending on O'ahu (\$202 per person) declined from last year (\$209 per person) (Tables 1 & 56).

- Lodging continued to be largest expense for visitors on all islands. O'ahu visitors' spent less on lodging (\$89) than in the previous year (Figure 9, Table 85).
- Compared to the other islands, visitors to O'ahu continued to spend the most per day on shopping at \$34 per person. However, shopping expenses were also down from last year.
- Based on average daily census, 99,782 visitors were on O'ahu on any given day in 2015, which was an increase of 3.5 percent from the previous year (Table 6).
- The U.S. markets continued to have the most visitors to O'ahu. Arrivals from U.S. West grew 4.4 percent to 1,525,939 visitors, while U.S. East arrivals were up 5.5 percent to 1,072,233 visitors (Tables 67 & 68). There were more domestic visitors to O'ahu from Anchorage (+6.1%), Boston (+5.4%), Chicago (+2.9%), Dallas (+8.7%), Los Angeles (5.2%), Philadelphia (+9.2%), Phoenix (+3.4%), Portland (+3.6%) and San Francisco (+9.7%) compared to 2014 (Table 51 and Table 52).
- Japanese arrivals to O'ahu decreased 2.2 percent to 1,436,749 visitors in 2015. Prior to this decline, there were slightly more Japanese visitors than U.S. West visitors on O'ahu from 2012 to 2014 (Figure 10, Tables 67 and 68)

**Figure 10: O‘ahu Visitor Arrivals by Selected MMA
2006 – 2015**



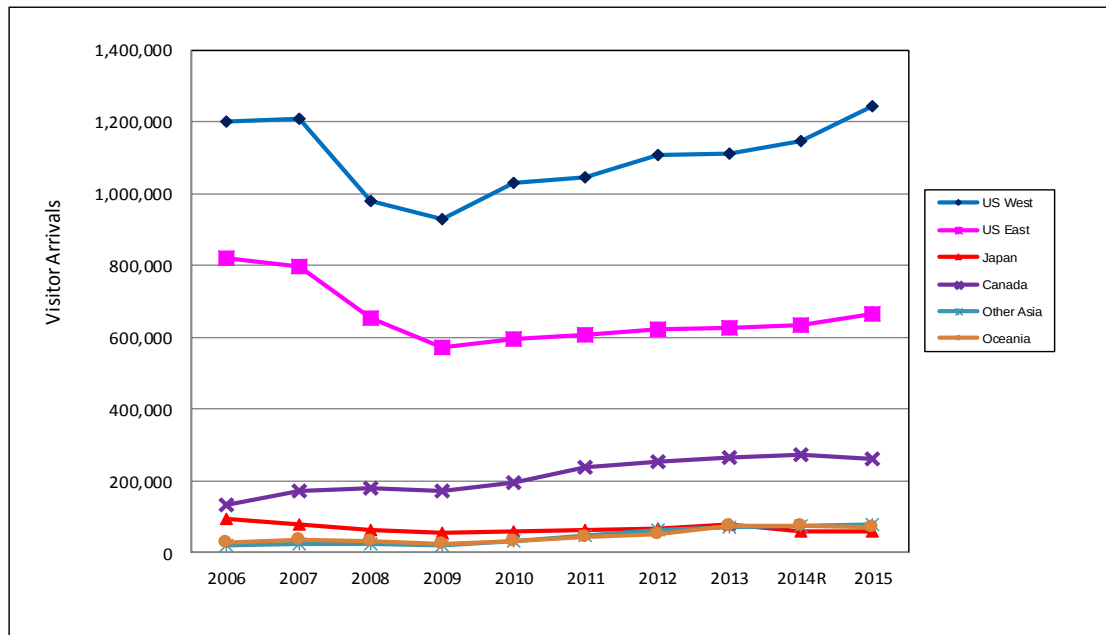
- Canadian arrivals of 208,542 visitors (-0.4%) were similar to 2014 (Figure 10, Tables 67 & 68).
- Oceania visitors to O‘ahu rose 8 percent compared to 2014, boosted by growth in arrivals from both Australia (+8.8%) and New Zealand (+3.7%).
- The number of visitors from Other Asia increased 7.5 percent with growth from China (+8.7%) and Korea (+9.8%) offsetting fewer visitors from Taiwan (-13.5%).
- Arrivals from Europe to O‘ahu grew 2.6 percent. Growth in visitors from United Kingdom (+8%) and Switzerland (+4.6%) offset a decrease France (-2.3%).
- Usage of rental homes (+17.8%) and bed and breakfast properties (+15.5%) by O‘ahu visitors increased significantly compared to 2014 (Table 56).
- The majority (71.7%) of O‘ahu visitors came to the state for vacation, 9.4 percent came to visit friends or relatives, 8.6 percent came to honeymoon, and 5.8 percent came for meetings, conventions, and incentives.

MAUI

Arrivals by air to the island of Maui increased 5.1 percent to 2,540,162 visitors in 2015, and visitor days rose 4.3 percent. Despite lower daily spending (-1.8% to \$198 per person) visitor expenditures on Maui gained 2.5 percent from 2014 to \$4.1 billion (Tables 1 & 58).

- Maui visitors’ daily lodging expenses of \$97 per person was similar to 2014 and was second highest, behind Lāna‘i visitors’ (Figure 9, Table 85).
- Maui visitors spent slightly less on food and beverage (\$40), shopping (\$18) and entertainment and recreation (\$16) than last year.

**Figure 11: Maui Visitor Arrivals by Selected MMA
2006 – 2015**



- Six out of ten visitors (62.9%) spent their entire time on Maui while the rest visited other islands (Table 58).
- The average daily census increased 4.3 percent to 56,981 visitors on Maui (Table 6).
- Repeat visitors accounted for 68 percent of Maui visitors, up from 66.8 percent in 2014.
- The majority of Maui visitors made their own travel arrangements (73.9%).
- The largest share of visitors to Maui in 2015 was from U.S. West (49%), followed by U.S. East (26.2%), Canada (10.2%), Other Asia (3.1%), Oceania (2.9%) and Japan (2.3%) (Table 67).
- Arrivals to Maui from U.S. West and U.S. East increased 8.6 percent and 4.7 percent, respectively. There were more visitors from Chicago (+7.5%), Colorado Springs (+9.3%), Dallas (+6.1%), Los Angeles (+7.3%), New York (+2.3%), Phoenix (+4.2%), Sacramento (+8.9%), San Francisco (+14.5%) and San Jose (+10.5%) (Table 51 and Table 52).
- The number of Japanese visitors to Maui (+0.1%) were comparable to 2014, while arrivals to Canada were down 4.4 percent (Tables 67 & 68).
- Arrivals from Oceania to Maui declined 3.3 percent, due to fewer visitors from Australia (-4.2%).
- Arrivals from Other Asia to Maui rose 6.2 percent from 2014 with increases from China (+8%), Korea (+4.4%) and Taiwan (+7.2%).
- More than half (55.1%) of visitors who went to Maui stayed in hotels while in the state, 29.3 percent stayed in condominiums, 11.8 percent stayed in timeshare properties, 6.4 percent stayed in rental homes, and 6.2 percent stayed with friends or relatives. Usage of rental homes (+11.6%) and bed and breakfast properties (+15.7%) rose significantly compared to 2014 (Table 58).
- The majority (83.7%) of Maui visitors came to the state for vacation, 6 percent came to honeymoon, 5.8 percent came for meetings, conventions, and incentives and 5.5 percent came to visit friends or relatives.

MOLOKAʻI³

Air arrivals to Molokaʻi grew 7.8 percent to 64,767 visitors in 2015 while visitor days were up 3.1 percent. However, decreased daily spending (\$118, from \$122 in 2014) resulted in no growth in visitor expenditures (-0.5% to \$33.7 million) compared to last year (Tables 1 & 59).

- Molokaʻi visitors in 2015 spent less on lodging (\$46), food and beverages (\$22) and entertainment and recreation (\$8) but more on transportation compared to the prior year (Figure 9, Table 85).
- Most of those who visited Molokaʻi also went to other islands, while only 11.9 percent stayed exclusively on Molokaʻi.
- The average daily census of 784 visitors per day in 2015 was a 3.1 percent growth from the previous year (Table 6).
- U.S. West (40.4%) and U.S. East (29.3%) continued to be the two largest visitor markets to Molokaʻi (Table 67).
- The majority of those who went to Molokaʻi in 2015 were repeat visitors (64.7%) to the state.
- Seven out of ten visitors (72.2%) to Molokaʻi were independent travelers while the remainder purchased group tours (8.2%) or package trips (25.5%).

LĀNAʻI³

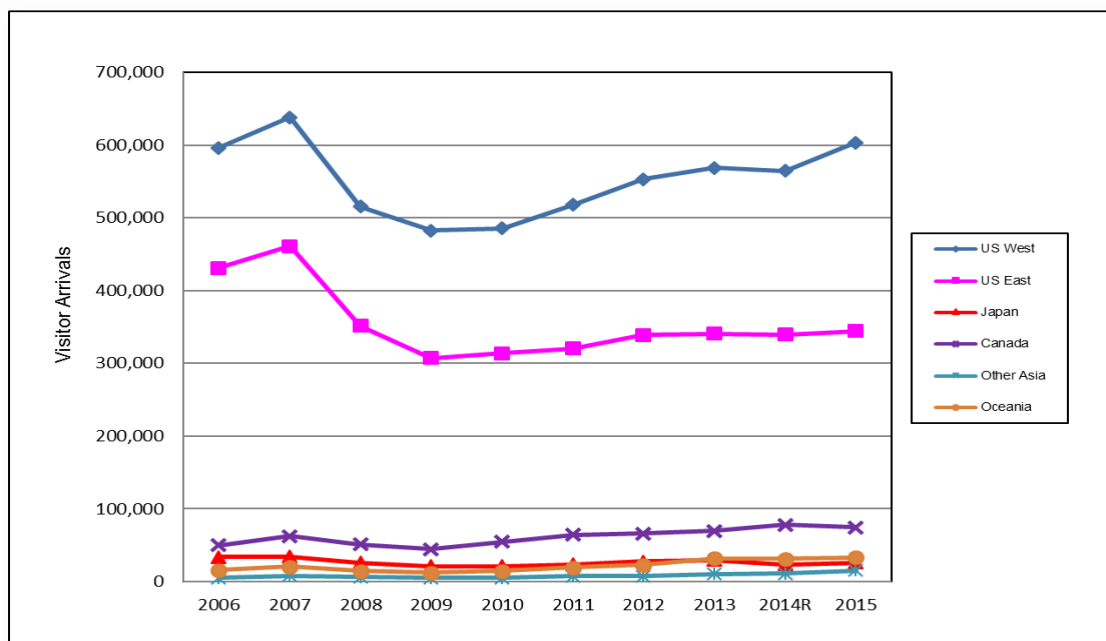
With most of the hotel rooms on the island closed for renovation from June in 2015, arrivals to Lānaʻi decreased significantly (-14.3% to 58,390 visitors) and a much shorter length of stay led to a 27.8 percent drop in visitor days. Daily spending by these visitors (\$263 per person) was much lower compared to 2014 (\$320 per person). Despite this significant drop, daily spending on Lānaʻi remained the highest compared to the other islands (Tables 1 & 60).

- Lānaʻi visitors in 2015 continued to spend the most on lodging, at \$152 per person down from \$176 last year.
- Spending on food and beverages (\$58), entertainment and recreation (\$20), transportation (\$15) and shopping (\$11) also declined (Figure 9, Table 85).
- Only 9.6 percent of these visitors spent their entire time on Lānaʻi while the majority visited other islands.
- The average daily census showed 446 visitors on Lānaʻi on any given day in 2015, compared to 619 visitors last year (Table 6).
- The largest group of visitors to Lānaʻi were from U.S. West (38.4%), followed by U.S. East (30.4%), Canada (6.9%) (Table 67).
- More repeat visitors (60.3%) than first-timers (39.7%) went to Lānaʻi.

³Small sample size for Lānaʻi and Molokaʻi resulted in broad estimates, use with discretion. Statistics may be used for year-to-year trends.

KAUAʻI

**Figure 12: Kauaʻi Visitor Arrivals by Selected MMA
2006 – 2015**



Air arrivals to Kauaʻi rose 4.8 percent to 1,173,752 visitors in 2015. Visitor days increased 3.9 percent. Higher daily spending (\$173 per person, up from \$165) also contributed to an 8.8 percent growth in visitor expenditures to \$1.5 billion (Tables 1 & 61).

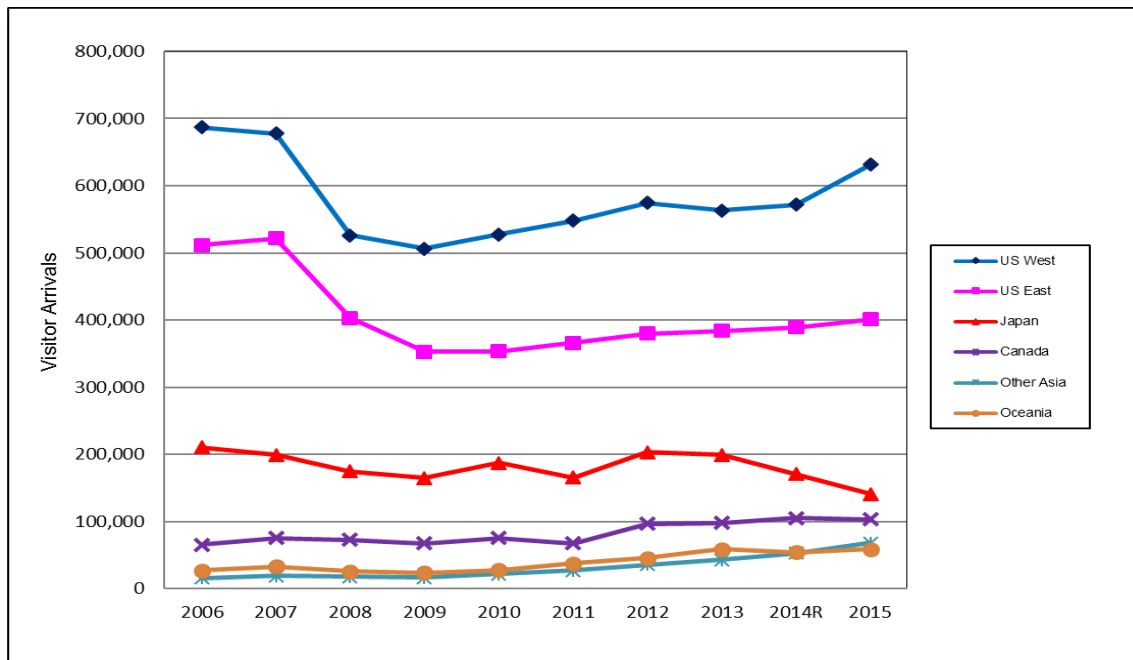
- Kauaʻi visitors in 2014 spent more on lodging (\$77), food and beverages (\$36), entertainment and recreation (\$20) and shopping (\$15) than in 2014 (Figure 9, Table 85).
- More than half (53.6%) of these visitors stayed on Kauaʻi exclusively.
- The average daily census increased 3.9 percent to 24,533 visitors per day (Table 6).
- U.S. West (51.4%) continued to have the largest share of visitors to Kauaʻi, followed by U.S. East (29.3%), Canada (6.4%), Europe (2.8%), Oceania (2.8%), Japan (2.2%) and Other Asia (1.3%) (Tables 67 & 68).
- Among the top four visitor markets, Canadian arrivals to Kauaʻi declined (-3.9%) but U.S. West (+6.9%), U.S. East (+1.4%) and Japanese (+7.8%) arrivals increased from 2014.
- There were more visitors from Other Asia (+37.4%) boosted by growth from China (+22.5%) and Korea (+39.7%). Arrivals from Oceania (+4.8%) and Europe (+4%) also increased.
- Repeat visitors comprised 70.2 percent of Kauaʻi visitors in 2015.
- The majority of visitors who went to Kauaʻi in 2015 were independent travelers (77.4%).
- Half (50.4%) of those who visited Kauaʻi stayed in hotels while in the state. Some stayed in condominium properties (21.9%), timeshare properties (18.5%), and rental homes (13.2%).
- Most of the visitors were in the state for vacation (84.9%), 6.5 percent visited friends or relatives, 5.7 percent honeymooned, and 4.5 percent came for meetings, conventions, and incentives.

HAWAI'I ISLAND

Arrivals by air to Hawai'i Island increased 4.1 percent to 1,514,973 visitors in 2015 and visitor days also rose 4.1 from last year. However, lower daily spending (-6.9% to \$160 per person) resulted in a decline in visitor expenditures (-3% to \$1.8 billion) (Tables 1 & 62).

- These visitors spent less on lodging (\$68), food and beverage (\$32), transportation (\$24), entertainment and recreation (\$17) and shopping (\$14) than in 2014 (Figure 9, Table 85).
- Close to half (48.2%) of these visitors spent all their time on Hawai'i Island.
- The average daily census grew 4.1 percent to 31,408 visitors present on any given day (Table 6).

**Figure 13: Hawai'i Island Visitor Arrivals by Selected MMA
2006 - 2015**



- The largest group of visitors to Hawai'i Island continued to be from U.S. West (41.7%), followed by U.S. East (26.5%), Japan (9.3%), Canada (6.8%), Other Asia (4.5%), Oceania (3.9%) and Europe (3.3%) (Tables 67 and 68).
- Arrivals from U.S. West (+10.4%) and U.S. East (+3.1%) increased compared to 2014, with more visitors to Hawai'i Island from Chicago (+6.5%), Las Vegas (+6.7%), Los Angeles (+7.7%), Portland (+9.3%), San Francisco (+10.6%) and Seattle (+7.4%) (Table 51 and Table 52).
- Arrivals to Hawai'i Island from Japan (-17.5%) and Canada (-1.8%) declined from last year.
- Among the emerging markets, there were significantly more visitors from China (+43%) and Taiwan (+29.5%). Arrivals from Australia (+8.4%) also increased.
- Of the visitors to Hawai'i Island in 2015, 64.9 percent have been to the state before while 35.1 percent were first-time visitors.
- The majority of Hawai'i Island visitors made their own travel arrangements (71.7%) instead of purchasing group tours (7.6%) or package trips (26.4%).

- Six out of ten (59.3%) visitors to Hawai'i Island stayed in hotels while in the state. Some visitors stayed in condominiums (18.2%), rental homes (11.8%), timeshare properties (10.4%) and/or with friends or relatives (10.3%). Usage of rental homes (+14.9%) rose significantly compared to 2014.
- The majority (81.3%) of the Hawai'i Island visitors came to the state for vacation, 8.9 percent came to visit friends or relatives, 6 percent for meetings, conventions and incentives and 5.1 percent to honeymoon.

Hawai'i Island (Hilo Side)

There were 551,764 air visitors to the Hilo side of Hawai'i Island in 2015, which was an increase of 3.2 percent from the previous year (Table 63).

- The average daily census showed 6,181 visitors present, up 1.9 percent from 2014.
- U.S. West (32.9%) continued to be the largest group of visitors to Hilo, followed by U.S. East (30.6%), Japan (8.4%), Canada (6.5%), Oceania (6.4%) and Other Asia (5.8%) (Table 67 & 68).
- More than half (55.6%) were repeat visitors to the state and 67.6 percent were true independent travelers. Only 10 percent purchased group tours while 30 percent purchased package trips.
- Two out of three visitors to Hilo stayed in hotels (63.8%), 18.1 percent stayed on cruise ships, 13.7 percent stayed in rental homes, 12.7 percent stayed with friends or relatives, and 6.2 percent stayed in timeshare properties while in the state.

Hawai'i Island (Kona Side)

Arrivals by air to Kona rose 5.3 percent to 1,288,021 visitors in 2015 (Table 64).

- The average daily census increased 4.7 percent to 25,227 visitors.
- A breakdown by visitor markets to Kona showed 43.4 percent from U.S. West, 26.1 percent from U.S. East, 8.2 percent from Japan, 7.4 percent from Canada and 3.7 percent from Oceania (Table 67).
- Two out of three visitors (66.2%) to Kona in 2015 have been to the state before.
- More visitors made their own travel arrangements (72.5%) than purchased group tours (6.8%) or package trips (25.8%).
- Six out of ten visitors to Kona stayed in hotels, 19.5 percent stayed in condominiums, 11.7 percent stayed in rental homes, 11.4 percent stayed in timeshares, 9.1 percent stayed with friends or relatives, and 7.9 percent stayed on cruise ships while in the state.

SEASONALITY BY ISLAND

The average daily census statewide indicated that there were 213,934 visitors on any given day in 2015, which represented 3.7 percent growth from the previous year. Average daily census increased on Maui (+4.3%), Hawai'i Island (+4.1%), Kaua'i (+3.9%), O'ahu (+3.5%) and Moloka'i (+3.1%) but declined on Lāna'i (-27.8%). In 2015, the busiest month statewide was December with 248,617 visitors per day. However, peak months varied by island (Tables 6, 7 and 50).

- **O'ahu:** In 2015, July was the busiest month on O'ahu with 115,267 visitors daily, followed by December (113,185 visitors daily) and June (111,734 visitors daily).
- **Maui:** The most popular months on Maui in 2015 were December (67,232 visitors daily), January (65,099 visitors daily) and July (62,982 visitors daily).
- **Hawai'i Island:** January (40,188 visitors daily) was the busiest month on Hawai'i Island in 2015, followed by December (39,228 visitors daily) and February (34,740 visitors daily).
- **Kaua'i:** The busiest month for arrivals to Kaua'i in 2015 was July (28,747 visitors daily), followed by June (28,230 visitors daily) and January (27,680 visitors daily).
- **Lāna'i:** In 2015, with most of the hotel rooms on the island closed for renovation starting in June, February was the heaviest traffic on Lāna'i with 575 visitors daily. followed by January and March with 562 visitors daily for both months.
- **Moloka'i:** January (1,176 visitors daily) was the peak month on Moloka'i followed by February (1,100 visitors daily) and December (982 visitors daily).

CRUISE VISITORS

There were 116,546 visitors who came by cruise ships⁴ to the islands in 2015, which was a decrease of 6.3 percent from the previous year (Tables 89 and 90). There were fewer trips from out-of-state cruise ships (63 tours) compared to 2014 (70 tours). Expenditures from visitors who came by cruise ships declined 9.8 percent \$38.4 million (Table 1).

Another 125,384 visitors (+5.4%) flew to the state and boarded cruise ships in Hawai'i after their arrival. In all, there were 241,929 total cruise visitors in 2015, down slightly (-0.6%) from last year (Table 89). Total spending by all cruise visitors (those who arrived by cruise ships and those who arrived by air to board cruise ships increased 3 percent to \$402.8 million in 2015 (Table 91). U.S. East cruise visitor expenditures rose to \$216.1 million from \$198.6 million in 2014. Expenditures by U.S. West cruise visitors of \$69.1 million was 10 percent more than the prior year. In contrast, expenditures Canadian cruise visitors dropped 11.9 percent to \$42.8 million.

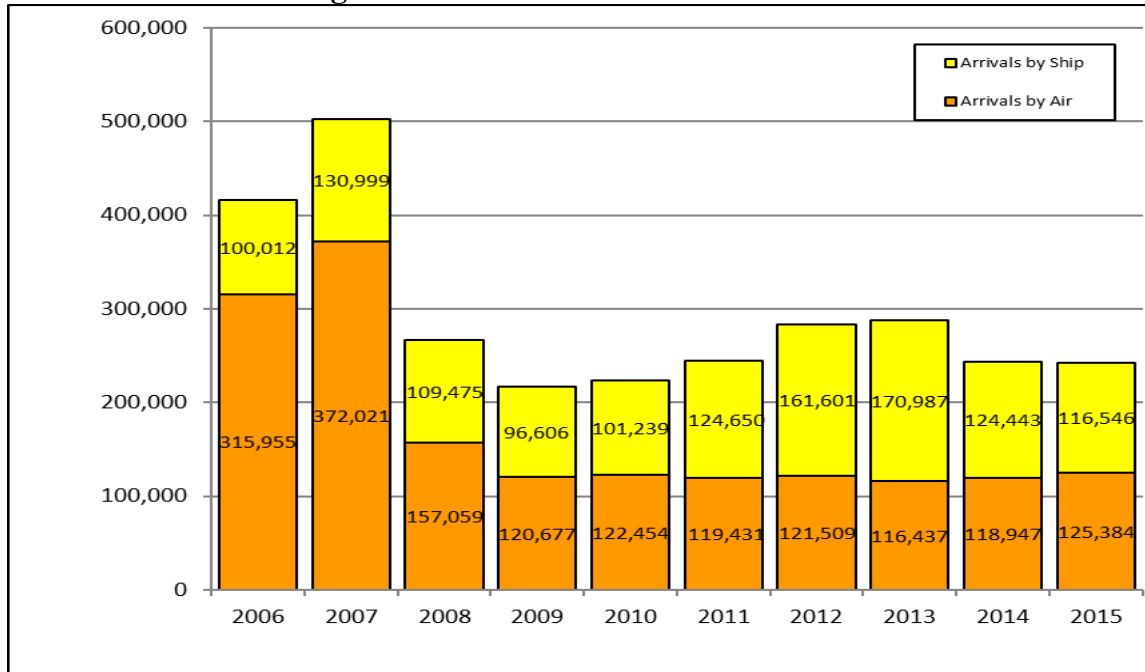
Island Visitation

Of the 245,631 total cruise passengers in 2015, 98.5 percent (or 241,929) were visitors, while 1.5 percent (3,702) were Hawai'i residents.

- By the nature of the cruise routes, most passengers went to the four largest islands. Nearly all (98.9%) of the cruise passengers visited O'ahu, 94.6 percent visited Maui, 93 percent visited Hawai'i Island, and 87.3 percent visited Kaua'i. In addition to their cruise itinerary, 4,917 passengers visited Lāna'i and 3,212 visited Moloka'i.

⁴ Limited characteristics and expenditures for visitors who entered Hawai'i on board a cruise ship are reported separately in the Cruise Visitors section and are not included as part of the statistics reported for visitor arrivals by air.

Figure 14: Cruise Visitors to Hawai'i: 2006 – 2015



- In terms of cruise visitors, the largest group was from U.S. East (39% of total cruise visitors), followed by visitors from U.S. West (25.7%), Canada (12.1%), Oceania (10.1%), Europe (5.3%) and other markets (7.8%).
- More than half (55.4%) of all cruise visitors have been to the islands before while 44.6 percent came for the first time. There were more first-timers among European (73%) and U.S. East (54.4%) cruise visitors. In contrast, repeat visitors comprised a larger percentage of cruise visitors from U.S. West (80.5%), Canada (52.8%) and Oceania (51.8%).
- Most (85.5%) of the visitors in 2015 cruised the islands for leisure, 9.1 percent visited friends or relatives, 2.1 percent were on their honeymoon and 1.7 percent played golf.

Length of Stay and Type of Accommodation

The average length of stay by all cruise visitors in 2015 was 7.84 days compared to 8.02 days in 2014. Cruise visitors in 2015 spent an average of 5.37 days aboard ship touring the islands and 1.16 days on shore after the cruise was over. In addition, visitors who arrived by air stayed an average of 1.31 days in Hawai'i before their cruise.

- Cruise visitors from Oceania in 2015 spent the most time in the islands at 9.41 days, up from 9.18 days in 2014. Their average length of cruise in 2015 was 5.40 days and these visitors also spent 2.21 days on shore after their cruise was over.
- The average length of stay by U.S. East visitors was 8.64 days, similar to 2014. In 2015, these visitors spent 6.03 days on ship and .98 days were spent post-cruise.
- The average length of stay by Canadian visitors was 7.53 days, compared to 8.04 days in 2014. In 2015, these visitors spent 5.06 days on ship and 1.16 days were spent after cruise.
- Cruise visitors from U.S. West in 2015 stayed an average 6.82 days (7.25 in 2014). Their average length of cruise was 4.92 days and these visitors also spent 1.12 days on shore post cruise.
- European cruise visitors stayed 5.53 days in 2015 (5.32 days in 2014), the shortest among the visitor groups. In 2015, they spent 3.87 days on ship and .86 of a day in Hawai'i post cruise.

- Over half (51.1%) of the cruise visitors in 2015 stayed in hotels in addition to their cruise stay, compared to 52.3 percent in 2014.
- Other lodging used by cruise visitors included condominiums (4.3%, from 5.1% in 2014), timeshare properties (4%, unchanged from 2014) and staying with friends or relatives (2.2%, from 2.4% in 2014).

Daily Spending

Cruise visitors in 2015 spent an average of \$283 per person per day statewide, compared to \$200 in 2014. This amount included on shore spending by visitors from all cruise ships, as well as spending on ship for visitors on the U.S. flagged Hawai'i home-ported ship which was considered as a Hawai'i business (Table 92).

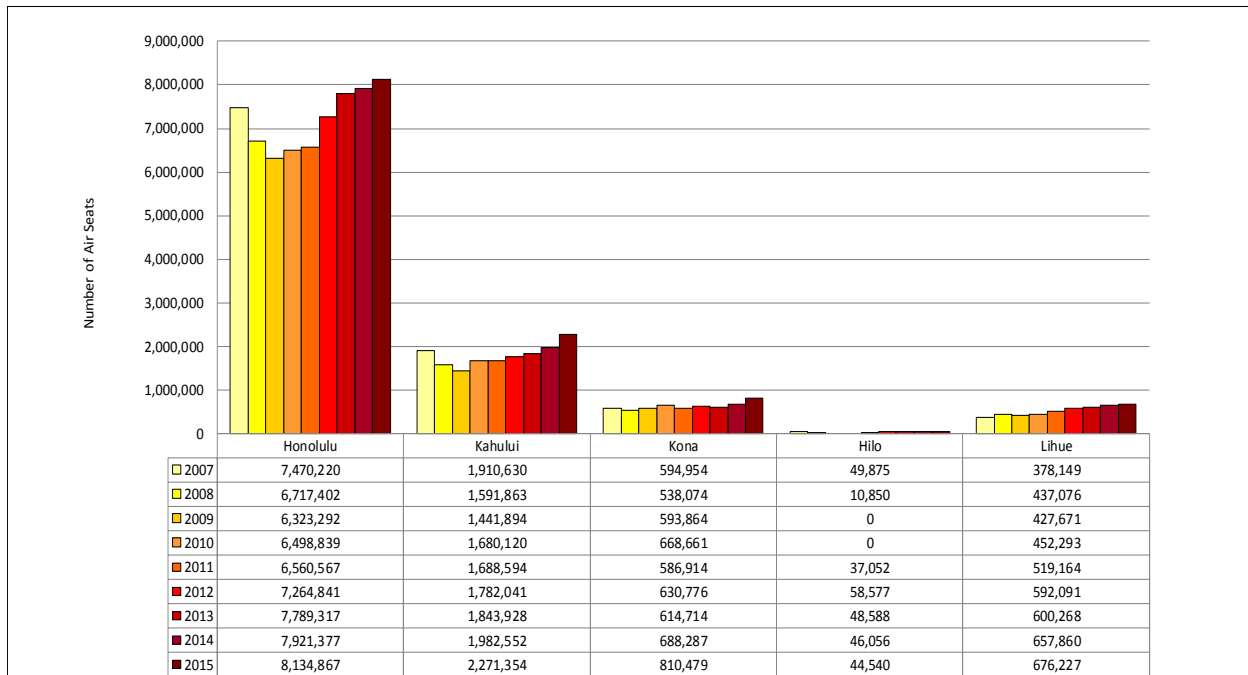
- The statewide figure of \$283 also included \$199 in visitor spending that was spent on board U.S. flagged Hawai'i home-ported ship or which cruise package expenditures could not be allocated to a specific expenditure category.
- Spending by cruise visitors on O'ahu was the highest among the four major islands at \$116, up from \$108 in 2014.
- Daily cruise visitor spending on Maui of \$73 was up from \$63 last year.
- Daily spending by cruise visitors on Hawai'i Island dropped slightly to \$69, from \$70 in 2014.
- Daily cruise visitor spending on Kaua'i of \$60 was similar to the prior year.

TOTAL AIR SEATS OPERATED TO HAWAI'I

Total air seats to the Hawaiian Islands increased 5.7 percent to 11,937,726 in 2015. Scheduled seats rose 5.9 percent to 11,833,440 but charter seats declined 16.8 percent to 104,286 due to fewer domestic and international charters (Table 93).

- Air capacity to the Honolulu International Airport grew 2.7 percent to 8,135,126 total seats. Growth in scheduled air seats from Canada (+22.7%), Oceania (+16.4%), U.S. West (+4.6%) and U.S. East (+4.3%) offset fewer seats from Other Asia (-7.3%) and Japan (-3.3%) (Tables 94 & 95).
- Seat capacity to Kahului airport climbed 14.6 percent to 2,271,354 total seats in 2015. Seats from U.S. West were up 13.3 percent, with increased service from Los Angeles, Oakland, Phoenix, Portland, San Francisco, San Jose and Seattle, offsetting reduced service from Bellingham and San Diego. Seats from U.S. East surged 35.9 percent, with nearly three time more seats out of Chicago and a 15.5 percent growth in seats out of Dallas. There were also more seats out of Canada (+13.1%), particularly from Toronto which offset reduced service from Vancouver.
- Seat capacity to the Kona International airport increased 17.8 percent to 810,479. There were more seats from U.S. West (+18.7%), particularly from Anchorage, Denver, Los Angeles, Oakland, San Diego, San Francisco, San Jose and Seattle. Additionally, seats from Canada rose 1.6 percent compared to 2014.
- Seats to Hilo airport declined 3.3 percent, due to reduced service out of Los Angeles.
- Seat capacity to the Līhu'e airport grew 2.8 percent to 676,227 seats in 2015. Seats from U.S. West were up 3.3 percent due to increased service out of Oakland, Phoenix, San Francisco and Seattle, offsetting fewer seats out of Denver and Los Angeles. Seats out of Canada grew 2.4 percent from last year.

**Figure 15: Air Seats Operated to Hawai'i by Island
2007-2015**



HOTEL OCCUPANCY AND ROOM RATE

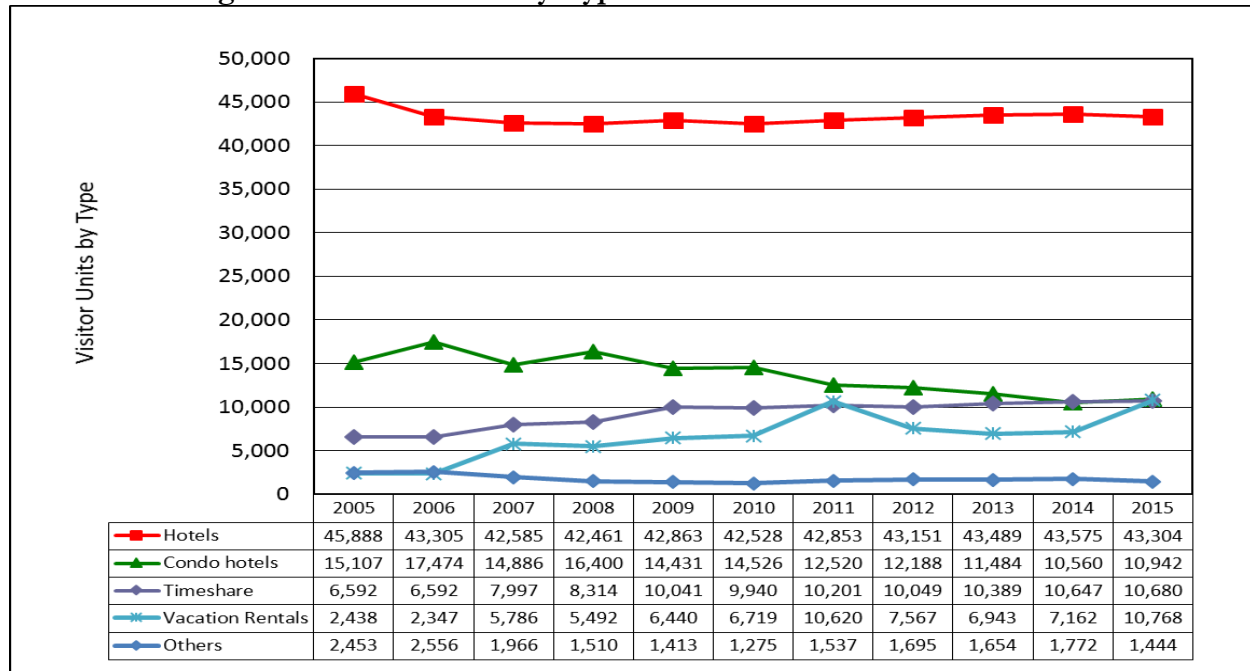
The statewide hotel occupancy rate for 2015 increased to 78.8 percent from 77 percent last year, supported by growth in visitor arrivals. All four larger Hawai'i Islands experienced higher hotel occupancy rates: Hawai'i Island (+5.3 points to 65.6%), Maui (+2 points to 74.5%), Kaua'i (+1.8 points to 78.8%) and O'ahu (+0.9 points to 85.3%) (Tables 96 to 100).

The statewide average room rate rose to \$243.93 from \$234.85 in 2014, as a result of increases from O'ahu, Maui and Kaua'i. Maui's room rate remained the highest at \$316.26 (\$295.94 in 2014). Room rates on Kaua'i at \$243.93 (\$234.85 in 2014) was second highest, followed by Hawai'i Island at \$230.26 (\$231.43 in 2014). O'ahu's room rate remained the lowest at \$219.53 (\$213.22 in 2014).

VISITOR PLANT INVENTORY

From HTA's 2015 Visitor Plant Inventory report (VPI)⁵, there were 77,138 lodging units available for short-term rental by Hawai'i visitors, which represented an increase of 4.6 percent (+3,422 units) compared to 2014. Most of the gains were in vacation rental units (+3,606) which were partially offset by decreases in hotel (-271), apartment hotel (-209) and bed and breakfast (-172) units (Tables 101 to 104).

Figure 16: Visitor Units by Type of Accommodations: 2005 – 2015



The large majority of the lodging supply in the State was comprised of hotel units (56.1% or 43,304 units). This count is slightly lower than 2014 (-0.6%) due to hotel properties closing for renovation or redevelopment. Nearly 60 percent of all hotel rooms were located on O'ahu (25,684).

Condo Hotels were the second largest property type in 2015 (14.2%), accounting for 10,942 visitor units. The overall number of Condo Hotel units increased by 3.6 percent. Most of the State's Condo Hotel supply was located on Maui (4,534 units) and O'ahu (4,328).

There were 10,680 timeshare units in 2015, representing 13.8 percent of the State's lodging units and a decrease of 0.3 percent from 2014's count. The Island of Maui had the largest share of the state's timeshare units, representing 30.2 percent of the State's timeshare supply.

Vacation Rental units accounted for 14 percent of all lodging units in 2015 (10,768 units), growing by 50.3 percent over 2014. Vacation Rental includes condominium units, houses, villas, cottages, and private and shared rooms. The increase in Vacation Rental units was mainly due to a greater effort in surveying Association of Unit Owners ("AOUO") managers located in resort areas. The increase in Vacation Rental units was also impacted by a change in classification of units that were formerly part of Condo Hotel rental pools and now operated as a Vacation Rental Condo ("VR-Condo") in 2015.

⁵ The 2015 Visitor Plant Inventory is posted on the HTA website: www.hawaiiitourismauthority.org/research/reports

VISITOR SATISFACTION

Visitor satisfaction levels are an important indicator of visitor industry performance. They provide important feedback on how well services are delivered and how well those services fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination. This section examined the first four questions from the 2015 Visitor Satisfaction and Activity survey (VSAT).

Overall Ratings of Most Recent Vacation to Hawai'i

The percentage of visitors who rated their most recent vacation to Hawai'i as "excellent"⁶ increased from most visitor markets compared to 2014. The majority of visitors in 2015 continued to give high marks for their overall experience in Hawai'i.

- In 2015, 84.5 percent of U.S. West visitors gave "excellent" rating to their overall trip to the islands, up from 81.6% in the previous year.
- Ratings by U.S. East (+4.3 points to 88.1%) and European (+3 points to 88.2%) were also higher than in 2014 while ratings by Japanese (+0.8 points to 69.6%), Canadian (+0.4% to 83.6%) and Oceania (-0.1 points to 76.8%) visitors were similar to last year.

Meeting Visitors' Expectations

Visitors' evaluation of their trip is influenced not only by the nature of the service they receive, but also by their needs, motivations, and interests. Overall, Hawai'i's ability to exceed expectations remained quite strong in 2015. Fewer than five percent of visitors reported that the trip failed to meet their expectations.

- A higher percentage of visitors from Europe (+2.4 points, to 51.9%) and U.S. West (+3.4 points to 38.2%) felt their trip exceeded their expectations compared to 2014.
- Ratings by Japanese visitors increased slightly (+1.4 points to 34.4%).
- Ratings by visitors from U.S. East (+0.4% to 49.1%), Canada (+0.5% to 41.2%) and Oceania (-0.1% to 36.8%) were about the same compared to last year.

Likelihood to Recommend Hawai'i

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. The majority of visitors surveyed in 2015 said they would very likely recommend Hawai'i to others.

- The percentage of U.S. West visitors who would "very likely" recommend Hawai'i to others rose 2 points to 90.2 percent in 2015.
- U.S. East ratings of 88.3 percent was a slight (+0.8%) increase from last year.
- However, ratings by visitors from Oceania (-1.4 points to 80.3%) and Canada (-0.9 points to 88.4%) declined from the prior year.
- Ratings by European (+0.4% to 82.9%) and Japanese (+0.4% to 75.5%) visitors were similar to 2014.

⁶ Excellent ratings are the sum of responses for ratings of 7 and 8 on an 8-point scale.

Likelihood to Revisit Hawai'i

Each visitor's decision to return to Hawai'i is influenced by a variety of factors: positive experiences during their most recent trips, a desire for new experiences, amount of time available, financial considerations, and other commitments. Likelihood to revisit Hawai'i is an indicator of future demand and changes in desires. The majority of Hawai'i visitors in all MMAs except Europe continue to indicate their intention to return in the near future. The percentage likely to return was closely correlated to distance from Hawai'i – the closer the MMA, the greater the likelihood of returning.

- In 2015, 78.4 percent of U.S. West visitors reported that they were very likely to revisit Hawai'i in the next five years, compared to 75.7 percent last year.
- Ratings among U.S. East (+5.7 points to 57.7%), Oceania (+2.3 points to 52.8%) and Japanese (+1.5 points to 52.3%) also increase from 2014.
- Ratings by Canadian visitors declined 1.3 points to 61.3 percent
- European visitors have always been a bit less likely to take the long trip in the next five years. In 2015, their ratings rose 7 points to 43.4 percent.