



U.S. Fact Sheet

United States Overview

The U.S. West and U.S. East are Hawai'i's two largest source markets for visitors. The U.S. West market includes visitors who travel to Hawai'i from the 12 states west of the Rockies, and the U.S. East includes all other states. The Hawai'i Tourism United States (HTUSA) COVID-19 recovery plan continues to focus on welcoming visitors who want to *mālama* (take care of) Hawai'i during their visit, with an emphasis on providing education pre- and post-arrival. HTUSA will promote the Mālama Hawai'i campaign, a partnership with visitor industry partners and volunteer organizations that invites visitors to stay in a regenerative way – to take the time to really know the islands, form a deeper connection with Hawai'i's culture and people, and travel while giving back mindfully. These efforts can also be seen in messaging throughout Hawai'i's airports for how to visit responsibly and respectfully, and even on Social Media platforms and navigation apps, like Waze, for new reservation systems at some of our frequented destinations on-island.

Year-to-date December 2022 Quick Facts^{1/}

| | |
|--------------------------|--|
| Visitor Expenditures: | \$16.17 billion |
| Primary Purpose of Stay: | Pleasure (6,555,515) vs. MCI (254,310) |
| Average Length of Stay: | 9.03 days |
| First Time Visitors: | 27.8% |
| Repeat Visitors: | 72.2% |

U.S. Total

| U.S. TOTAL (by Air) | 2019 | 2020 | 2021 | 2022 Annual Forecast* | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------------------|------------|------------|------------|-----------------------------|-------------------|------------------|-----------------|
| Visitor Expenditures (\$ Millions) | 11,636.2 | NA | 12,317.9 | 16,236.3 | 16,166.1 | 12,317.9 | 31.2% |
| Visitor Days | 61,786,807 | 21,998,856 | 61,249,728 | 71,234,186 | 70,044,466 | 61,249,727 | 14.4% |
| Arrivals | 6,871,839 | 1,987,326 | 6,468,899 | 7,850,503 | 7,760,131 | 6,468,899 | 20.0% |
| Average Daily Census | 169,279 | 60,106 | 167,807 | 195,162 | 191,903 | 167,807 | 14.4% |
| Per Person Per Day Spending (\$) | 188.3 | NA | 201.1 | 227.9 | 230.8 | 201.1 | 14.8% |
| Per Person Per Trip Spending (\$) | 1,693.3 | NA | 1,904.2 | 2,068.2 | 2,083.2 | 1,904.2 | 9.4% |
| Length of Stay (days) | 8.99 | 11.07 | 9.47 | 9.07 | 9.03 | 9.47 | -4.7% |

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 3, 2022).

^{1/} 2022 visitor data are preliminary. 2021, 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

U.S. West

| U.S. WEST MMA (by Air) | 2019 | 2020 | 2021 | 2022 Annual Forecast* | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------------------|------------|------------|------------|-----------------------------|-------------------|------------------|-----------------|
| Visitor Expenditures (\$ Millions) | 6,952.0 | NA | 7,994.4 | 9,946.1 | 10,052.9 | 7,994.4 | 25.7% |
| Visitor Days | 39,752,689 | 13,921,800 | 40,900,008 | 45,934,614 | 45,558,089 | 40,900,008 | 11.4% |
| Arrivals | 4,595,319 | 1,311,176 | 4,473,588 | 5,312,878 | 5,286,825 | 4,473,588 | 18.2% |
| Average Daily Census | 108,911 | 38,038 | 112,055 | 125,848 | 124,817 | 112,055 | 11.4% |
| Per Person Per Day Spending (\$) | 174.9 | NA | 195.5 | 216.5 | 220.7 | 195.5 | 12.9% |
| Per Person Per Trip Spending (\$) | 1,512.8 | NA | 1,787.0 | 1,872.1 | 1,901.5 | 1,787.0 | 6.4% |
| Length of Stay (days) | 8.65 | 10.62 | 9.14 | 8.65 | 8.62 | 9.14 | -5.7% |

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 3, 2022).

U.S. East

| U.S. EAST MMA (by Air) | 2019 | 2020 | 2021 | 2022 Annual Forecast* | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------------------|------------|-----------|------------|-----------------------------|-------------------|------------------|-----------------|
| Visitor Expenditures (\$ Millions) | 4,684.2 | NA | 4,323.5 | 6,290.2 | 6,113.2 | 4,323.5 | 41.4% |
| Visitor Days | 22,034,119 | 8,077,056 | 20,349,720 | 25,299,572 | 24,486,377 | 20,349,720 | 20.3% |
| Arrivals | 2,276,520 | 676,150 | 1,995,311 | 2,537,626 | 2,473,306 | 1,995,311 | 24.0% |
| Average Daily Census | 60,367 | 22,068 | 55,753 | 69,314 | 67,086 | 55,753 | 20.3% |
| Per Person Per Day Spending (\$) | 212.6 | NA | 212.5 | 248.6 | 249.7 | 212.5 | 17.5% |
| Per Person Per Trip Spending (\$) | 2,057.6 | NA | 2,166.8 | 2,478.8 | 2,471.7 | 2,166.8 | 14.1% |
| Length of Stay (days) | 9.68 | 11.95 | 10.20 | 9.97 | 9.90 | 10.20 | -2.9% |

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 3, 2022).

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Market Summary

Prior to the pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or had a negative COVID pre-travel test. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights through June 11, 2022 were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel. This requirement was lifted on June 12, 2022.

U.S. West

- For all of 2022, there were 5,286,825 visitors from the U.S. West compared to 4,595,319 visitors (+15.0%) in 2019.
- U.S. West visitors spent \$10.05 billion in 2022 compared to \$6.95 billion (+44.6%) in 2019. The average daily visitor spending in 2022 was \$221 per person, up considerably from \$175 per person (+26.2%) in 2019.
- In 2022, there were 48,899 scheduled flights and 9,813,512 seats from the U.S. West compared to 42,760 flights (+14.4%) and 8,564,295 seats (+14.6%) in 2019.
- In 2021, there were 4,473,588 visitors from the U.S. West compared to 1,311,176 visitors (+241.2%) in 2020, and 4,595,319 visitors (-2.6%) in 2019.
- Total visitor spending in 2021 was \$7.99 billion, an increase of 15.0 percent from \$6.95 billion in 2019. Comparative annual 2020 spending data was not available.
- In 2021, there were 45,246 scheduled flights with 8,989,207 seats from the U.S. West. In comparison, there were 18,601 flights with 3,772,048 seats in 2020, and 42,760 flights with 8,564,295 seats in 2019.

U.S. East

- For all of 2022, 2,473,306 visitors arrived from the U.S. East, compared to 2,276,520 visitors (+8.6%) in 2019.
- U.S. East visitors spent \$6.11 billion in 2022 compared to \$4.68 billion (+30.5%) in 2019. Daily visitor spending in 2022 rose to \$250 per person compared to \$213 per person (+17.4%) in 2019.
- In 2022, there were 4,565 scheduled flights and 1,262,967 seats from the U.S. East compared to 4,129 flights (+10.6%) and 1,182,495 seats (+6.8%) in 2019.
- In 2021, there were 1,995,311 visitors from the U.S. East compared to 676,150 visitors (+195.1%) in 2020, and 2,276,520 visitors (-12.4%) in 2019.
- Total visitor spending in 2021 was \$4.32 billion, a decrease of 7.7 percent from \$4.68 billion in 2019.
- In 2021, there were 4,696 scheduled flights with 1,249,514 seats from the U.S. East. In comparison, there were 1,775 flights with 487,874 seats in 2020, and 4,129 flights with 1,182,495 seats in 2019.

Market Conditions

- Real gross domestic product (GDP) increased at an annual rate of 3.2 percent in the third quarter of 2022, in contrast to a decrease of 0.6 percent in the second quarter, primarily reflecting increases in exports and consumer spending that were partly offset by a decrease in housing investment.
- Consumer confidence increased in December following back-to-back monthly declines probably due to consumers' more favorable view regarding the economy and jobs and inflation expectations retreating to their lowest levels since September 2021, with recent declines in gas prices. The Index now stands at 108.3 (1985 = 100), which is up from 101.4 in November. The Present Situation Index based on consumers' assessment of current business and labor market conditions increased to 147.2 from 138.3 last month, and the Expectations Index has improved to 82.4 from 76.7.
- Air travel remains resilient, despite the overall decrease in consumer sentiment and an expected recession. HTA Airline Seat Capacity Outlook for January – March 2023 was updated on Jan. 4 and the forecast for domestic scheduled nonstop air seats to Hawai'i during this period will decrease -0.1 percent compared to the same period in 2022. A decrease in flights is expected from U.S. West (-3.0 percent) while the +11.3 percent increase from U.S. East is a result of the addition of Delta flights ATL-OGG and DTW-HNL in November and JFK-HNL starting in December. Hawai'i Booking trends have been pacing down for a few months. It appears to be a combination of several factors – high YOY comparable after a strong 2021 and 2022, higher ADR's compared to other sun destinations and continuing strong demand for Europe. The booking window remains between 100-110 days.

Distribution by Island

U.S. Total

| U.S. TOTAL (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------|-----------|---------|-----------|-------------------|------------------|-----------------|
| O'ahu | 3,326,507 | 967,359 | 3,142,030 | 3,836,289 | 3,142,030 | 22.1% |
| Maui County | 2,488,629 | 672,005 | 2,239,395 | 2,562,915 | 2,239,395 | 14.4% |
| Maui | 2,449,124 | 659,185 | 2,204,165 | 2,521,070 | 2,204,165 | 14.4% |
| Moloka'i | 42,603 | 12,231 | 24,316 | 35,010 | 24,316 | 44.0% |
| Lāna'i | 59,810 | 14,527 | 45,369 | 55,855 | 45,369 | 23.1% |
| Kaua'i | 1,135,672 | 280,457 | 785,082 | 1,207,081 | 785,082 | 53.8% |
| Island of Hawai'i | 1,251,171 | 379,153 | 1,137,156 | 1,447,168 | 1,137,156 | 27.3% |

U.S. West

| U.S. WEST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------|-----------|---------|-----------|-------------------|------------------|-----------------|
| O'ahu | 2,005,506 | 582,276 | 2,005,024 | 2,427,618 | 2,005,024 | 21.1% |
| Maui County | 1,641,441 | 438,612 | 1,546,151 | 1,685,388 | 1,546,151 | 9.0% |
| Maui | 1,616,213 | 430,261 | 1,523,024 | 1,658,091 | 1,523,024 | 8.9% |
| Moloka'i | 25,823 | 7,423 | 15,779 | 22,110 | 15,779 | 40.1% |
| Lāna'i | 31,672 | 7,968 | 26,221 | 31,493 | 26,221 | 20.1% |
| Kaua'i | 730,725 | 179,451 | 540,578 | 810,380 | 540,578 | 49.9% |
| Island of Hawai'i | 786,520 | 244,963 | 763,139 | 929,087 | 763,139 | 21.7% |

U.S. East

| U.S. EAST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------|-----------|---------|-----------|-------------------|------------------|-----------------|
| O'ahu | 1,321,001 | 385,083 | 1,137,006 | 1,408,671 | 1,137,006 | 23.9% |
| Maui County | 847,188 | 233,393 | 693,244 | 877,527 | 693,244 | 26.6% |
| Maui | 832,911 | 228,925 | 681,140 | 862,979 | 681,140 | 26.7% |
| Moloka'i | 16,780 | 4,808 | 8,536 | 12,899 | 8,536 | 51.1% |
| Lāna'i | 28,138 | 6,559 | 19,148 | 24,363 | 19,148 | 27.2% |
| Kaua'i | 404,948 | 101,006 | 244,504 | 396,701 | 244,504 | 62.2% |
| Island of Hawai'i | 464,651 | 134,191 | 374,017 | 518,081 | 374,017 | 38.5% |

Airlift: Scheduled Seats and Flights

| Scheduled seats | 2022 | | | | | 2021 | | | | | %CHANGE | | | | |
|--------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|-------------|-------------|-------------|-------------|------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| US WEST | 2,468,737 | 2,545,146 | 2,511,865 | 2,324,151 | 9,849,899 | 1,509,348 | 2,163,031 | 2,773,109 | 2,543,719 | 8,989,207 | 63.6 | 17.7 | -9.4 | -8.6 | 9.6 |
| Anchorage | 29,271 | 10,815 | 0 | 9,194 | 49,280 | 19,716 | 13,833 | 11,702 | 24,980 | 70,231 | 48.5 | -21.8 | -100.0 | -63.2 | -29.8 |
| Denver | 94,617 | 81,399 | 92,495 | 101,751 | 370,262 | 52,767 | 95,755 | 119,828 | 101,625 | 369,975 | 79.3 | -15.0 | -22.8 | 0.1 | 0.1 |
| Las Vegas | 147,663 | 144,026 | 169,915 | 149,156 | 610,760 | 42,256 | 57,249 | 134,376 | 130,246 | 364,127 | 249.4 | 151.6 | 26.4 | 14.5 | 67.7 |
| Long Beach | 65,331 | 65,681 | 61,131 | 49,931 | 242,074 | 24,766 | 64,470 | 77,273 | 63,364 | 229,873 | 163.8 | 1.9 | -20.9 | -21.2 | 5.3 |
| Los Angeles | 668,218 | 698,005 | 699,267 | 625,669 | 2,691,159 | 371,317 | 594,918 | 803,612 | 710,296 | 2,480,143 | 80.0 | 17.3 | -13.0 | -11.9 | 8.5 |
| Oakland | 154,952 | 160,601 | 155,393 | 147,672 | 618,618 | 109,650 | 129,029 | 157,514 | 144,165 | 540,358 | 41.3 | 24.5 | -1.3 | 2.4 | 14.5 |
| Ontario | 16,821 | 17,199 | 17,199 | 17,388 | 68,607 | 2,079 | 13,986 | 17,388 | 17,199 | 50,652 | 709.1 | 23.0 | -1.1 | 1.1 | 35.4 |
| Phoenix | 173,150 | 162,392 | 151,485 | 152,086 | 639,113 | 90,147 | 144,673 | 172,296 | 171,235 | 578,351 | 92.1 | 12.2 | -12.1 | -11.2 | 10.5 |
| Portland | 92,407 | 92,394 | 72,170 | 79,049 | 336,020 | 71,639 | 85,864 | 78,517 | 84,853 | 320,873 | 29.0 | 7.6 | -8.1 | -6.8 | 4.7 |
| Sacramento | 78,066 | 88,011 | 72,754 | 58,306 | 297,137 | 61,405 | 64,339 | 73,269 | 72,326 | 271,339 | 27.1 | 36.8 | -0.7 | -19.4 | 9.5 |
| Salt Lake City | 45,969 | 28,848 | 22,621 | 24,781 | 122,219 | 38,908 | 44,565 | 33,431 | 27,259 | 144,163 | 18.1 | -35.3 | -32.3 | -9.1 | -15.2 |
| San Diego | 156,957 | 154,184 | 129,243 | 125,889 | 566,273 | 73,957 | 116,653 | 188,167 | 167,044 | 545,821 | 112.2 | 32.2 | -31.3 | -24.6 | 3.7 |
| San Francisco | 310,947 | 362,941 | 390,053 | 328,326 | 1,392,267 | 205,670 | 282,002 | 382,039 | 340,793 | 1,210,504 | 51.2 | 28.7 | 2.1 | -3.7 | 15.0 |
| San Jose | 132,756 | 177,480 | 182,555 | 165,104 | 657,895 | 126,936 | 150,880 | 185,192 | 164,354 | 627,362 | 4.6 | 17.6 | -1.4 | 0.5 | 4.9 |
| Santa Ana | 11,088 | 11,340 | 8,442 | 1,764 | 32,634 | 0 | 6,930 | 11,592 | 11,214 | 29736.0 | NA | 63.6 | -27.2 | -84.3 | 9.7 |
| Seattle | 290,524 | 289,830 | 287,142 | 288,085 | 1,155,581 | 218,135 | 297,885 | 326,913 | 312,766 | 1,155,699.0 | 33.2 | -2.7 | -12.2 | -7.9 | 0.0 |

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of December 22, 2022 subject to change.

| Scheduled flights | 2022 | | | | | 2021 | | | | | %CHANGE | | | | |
|----------------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|---------------|---------------|---------------|-------------|-------------|--------------|--------------|------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| US WEST | 12,375 | 12,884 | 12,480 | 11,347 | 49,086 | 7,586 | 10,980 | 13,925 | 12,755 | 45,246 | 63.1 | 17.3 | -10.4 | -11.0 | 8.5 |
| Anchorage | 178 | 63 | 0 | 54 | 295 | 124 | 87 | 73 | 154 | 438 | 43.5 | -27.6 | -100.0 | -64.9 | -32.6 |
| Denver | 444 | 360 | 365 | 384 | 1,553 | 232 | 429 | 512 | 461 | 1,634 | 91.4 | -16.1 | -28.7 | -16.7 | -5.0 |
| Las Vegas | 696 | 678 | 825 | 701 | 2,900 | 152 | 230 | 624 | 595 | 1,601 | 357.9 | 194.8 | 32.2 | 17.8 | 81.1 |
| Long Beach | 359 | 361 | 335 | 271 | 1,326 | 134 | 354 | 427 | 348 | 1,263 | 167.9 | 2.0 | -21.5 | -22.1 | 5.0 |
| Los Angeles | 3,227 | 3,412 | 3,396 | 2,949 | 12,984 | 1,752 | 2,889 | 3,894 | 3,432 | 11,967 | 84.2 | 18.1 | -12.8 | -14.1 | 8.5 |
| Oakland | 864 | 895 | 863 | 822 | 3,444 | 613 | 718 | 878 | 803 | 3,012 | 40.9 | 24.7 | -1.7 | 2.4 | 14.3 |
| Ontario | 89 | 91 | 91 | 92 | 363 | 11 | 74 | 92 | 91 | 268 | 709.1 | 23.0 | -1.1 | 1.1 | 35.4 |
| Phoenix | 837 | 815 | 754 | 733 | 3,139 | 418 | 681 | 835 | 830 | 2,764 | 100.2 | 19.7 | -9.7 | -11.7 | 13.6 |
| Portland | 506 | 481 | 369 | 426 | 1,782 | 412 | 494 | 446 | 487 | 1,839 | 22.8 | -2.6 | -17.3 | -12.5 | -3.1 |
| Sacramento | 386 | 428 | 347 | 282 | 1,443 | 336 | 340 | 358 | 354 | 1,388 | 14.9 | 25.9 | -3.1 | -20.3 | 4.0 |
| Salt Lake City | 159 | 123 | 92 | 106 | 480 | 157 | 174 | 141 | 103 | 575 | 1.3 | -29.3 | -34.8 | 2.9 | -16.5 |
| San Diego | 860 | 848 | 708 | 686 | 3,102 | 411 | 654 | 1,051 | 921 | 3,037 | 109.2 | 29.7 | -32.6 | -25.5 | 2.1 |
| San Francisco | 1,446 | 1,713 | 1,724 | 1,384 | 6,267 | 934 | 1,338 | 1,712 | 1,511 | 5,495 | 54.8 | 28.0 | 0.7 | -8.4 | 14.0 |
| San Jose | 753 | 1,018 | 1,044 | 944 | 3,759 | 729 | 874 | 1,065 | 947 | 3,615 | 3.3 | 16.5 | -2.0 | -0.3 | 4.0 |
| Santa Ana | 88 | 90 | 67 | 14 | 259 | 0 | 55 | 92 | 89 | 236 | NA | 63.6 | -27.2 | -84.3 | 9.7 |
| Seattle | 1,483 | 1,508 | 1,500 | 1,499 | 5,990 | 1,171 | 1,589 | 1,725 | 1,629 | 6,114 | 26.6 | -5.1 | -13.0 | -8.0 | -2.0 |

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of December 22, 2022 subject to change.

| Scheduled seats | 2022 | | | | | 2021 | | | | | %CHANGE | | | | |
|-----------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|------------------|-------------|-------------|--------------|-------------|------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| US EAST | 324,177 | 300,088 | 312,676 | 329,714 | 1,266,655 | 200,235 | 311,750 | 400,887 | 336,642 | 1,249,514 | 61.9 | -3.7 | -22.0 | -2.1 | 1.4 |
| Atlanta | 25,281 | 23,253 | 23,097 | 40,037 | 111,668 | 15,886 | 22,203 | 26,663 | 23,861 | 88,613 | 59.1 | 4.7 | -13.4 | 67.8 | 26.0 |
| Austin | 11,120 | 10,564 | 10,286 | 10,842 | 42,812 | 0 | 6,672 | 9,452 | 8,062 | 24,186 | NA | 58.3 | 8.8 | 34.5 | 77.0 |
| Boston | 14,456 | 14,734 | 14,178 | 14,734 | 58,102 | 6,950 | 9,730 | 16,680 | 16,680 | 50,040 | 108.0 | 51.4 | -15.0 | -11.7 | 16.1 |
| Charlotte | 546 | 0 | 0 | 0 | 546 | 0 | 12831 | 25116 | 23751 | 61,698 | NA | -100.0 | -100.0 | -100.0 | -99.1 |
| Chicago | 51,047 | 55,414 | 54,165 | 50,607 | 211,233 | 37,735 | 63,428 | 82,441 | 46,671 | 230,275 | 35.3 | -12.6 | -34.3 | 8.4 | -8.3 |
| Dallas | 98,625 | 92,709 | 86,145 | 93,654 | 371,133 | 97,135 | 102,464 | 119,682 | 118,196 | 437,477 | 1.5 | -9.5 | -28.0 | -20.8 | -15.2 |
| Detroit | 0 | 0 | 0 | 9676 | 9676 | 0 | 0 | 0 | 0 | 0 | NA | NA | NA | NA | NA |
| Houston | 24,564 | 26,670 | 31,892 | 33,488 | 116,614 | 15,194 | 21,210 | 24,840 | 24,840 | 86,084 | 61.7 | 25.7 | 28.4 | 34.8 | 35.5 |
| Minneapolis | 26,370 | 17,527 | 17,328 | 17,176 | 78,401 | 13,994 | 21,199 | 14,943 | 10,255 | 60,391 | 88.4 | -17.3 | 16.0 | 67.5 | 29.8 |
| New York JFK | 24,464 | 25,298 | 25,576 | 28,741 | 104,079 | 10,008 | 18,348 | 24,186 | 23,630 | 76,172 | 144.4 | 37.9 | 5.7 | 21.6 | 36.6 |
| Newark | 27,038 | 17,521 | 29,669 | 25,719 | 99,947 | 1,665 | 15,953 | 29,950 | 25,754 | 73,322 | 1523.9 | 9.8 | -0.9 | -0.1 | 36.3 |
| Orlando | 11,120 | 10,842 | 8,340 | 0 | 30,302 | 1,668 | 8,340 | 9,174 | 8,618 | 27,800 | 566.7 | 30.0 | -9.1 | -100.0 | 9.0 |
| Washington D.C. | 9,546 | 5,556 | 12,000 | 5,040 | 32,142 | 0 | 9,372 | 17,760 | 6,324 | 33,456 | NA | -40.7 | -32.4 | -20.3 | -3.9 |

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of December 22, 2022 subject to change.

| Scheduled flights | 2022 | | | | | 2021 | | | | | %CHANGE | | | | |
|-------------------|--------------|--------------|--------------|--------------|--------------|------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|-------------|-------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| US EAST | 1,193 | 1,073 | 1,127 | 1,185 | 4,578 | 790 | 1,206 | 1,469 | 1,231 | 4,696 | 51.0 | -11.0 | -23.3 | -3.7 | -2.5 |
| Atlanta | 90 | 91 | 91 | 135 | 407 | 67 | 82 | 91 | 82 | 322 | 34.3 | 11.0 | 0.0 | 64.6 | 26.4 |
| Austin | 40 | 38 | 37 | 39 | 154 | 0 | 24 | 34 | 29 | 87 | NA | 58.3 | 8.8 | 34.5 | 77.0 |
| Boston | 52 | 53 | 51 | 53 | 209 | 25 | 35 | 60 | 60 | 180 | 108.0 | 51.4 | -15.0 | -11.7 | 16.1 |
| Charlotte | 2 | 0 | 0 | 0 | 2 | 0 | 47 | 92 | 87 | 226 | NA | -100.0 | -100.0 | -100.0 | -99.1 |
| Chicago | 188 | 174 | 187 | 175 | 724 | 163 | 266 | 287 | 166 | 882 | 15.3 | -34.6 | -34.8 | 5.4 | -17.9 |
| Dallas | 347 | 329 | 309 | 333 | 1,318 | 355 | 372 | 430 | 425 | 1,582 | -2.3 | -11.6 | -28.1 | -21.6 | -16.7 |
| Detroit | | | | 43 | 43 | | | | 0 | 0 | | | | NA | NA |
| Houston | 89 | 91 | 91 | 92 | 363 | 71 | 91 | 90 | 90 | 342 | 25.4 | 0.0 | 1.1 | 2.2 | 6.1 |
| Minneapolis | 90 | 67 | 66 | 76 | 299 | 59 | 78 | 51 | 35 | 223 | 52.5 | -14.1 | 29.4 | 117.1 | 34.1 |
| New York JFK | 88 | 91 | 92 | 107 | 378 | 36 | 66 | 87 | 85 | 274 | 144.4 | 37.9 | 5.7 | 25.9 | 38.0 |
| Newark | 123 | 77 | 123 | 111 | 434 | 8 | 75 | 140 | 114 | 337 | 1437.5 | 2.7 | -12.1 | -2.6 | 28.8 |
| Orlando | 40 | 39 | 30 | 0 | 109 | 6 | 30 | 33 | 31 | 100 | 566.7 | 30.0 | -9.1 | -100.0 | 9.0 |
| Washington D.C. | 44 | 23 | 50 | 21 | 138 | 0 | 40 | 74 | 27 | 141 | NA | -42.5 | -32.4 | -22.2 | -2.1 |

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of December 22, 2022 subject to change.

Group vs. True Independent; Leisure vs. Business

U.S. Total

| U.S. TOTAL (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------------------|-----------|-----------|-----------|-------------------|------------------|-----------------|
| Group vs True Independent (Net) | | | | | | |
| Group Tour | 143,078 | NA | 79,289 | 148,008 | 79,289 | 86.7% |
| True Independent (Net) | 5,674,869 | NA | 5,535,997 | 6,602,451 | 5,535,997 | 19.3% |
| Leisure vs Business | | | | | | |
| Pleasure (Net) | 5,720,309 | 1,526,068 | 5,581,810 | 6,555,515 | 5,581,810 | 17.4% |
| MCI (Net) | 293,659 | 93,411 | 91,854 | 254,310 | 91,854 | 176.9% |
| Convention/Conf. | 171,970 | 60,311 | 41,590 | 139,145 | 41,590 | 234.6% |
| Corp. Meetings | 72,478 | 20,111 | 26,955 | 66,719 | 26,955 | 147.5% |
| Incentive | 59,031 | 15,943 | 26,694 | 57,639 | 26,694 | 115.9% |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

U.S. West

| U.S. WEST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------------------|-----------|-----------|-----------|-------------------|------------------|-----------------|
| Group vs True Independent (Net) | | | | | | |
| Group Tour | 67,037 | NA | 43,863 | 73,810 | 43,863 | 68.3% |
| True Independent (Net) | 3,836,896 | NA | 3,856,005 | 4,550,938 | 3,856,005 | 18.0% |
| Leisure vs Business | | | | | | |
| Pleasure (Net) | 3,885,753 | 1,022,954 | 3,903,665 | 4,529,778 | 3,903,665 | 16.0% |
| MCI (Net) | 154,692 | 47,904 | 52,735 | 135,336 | 52,735 | 156.6% |
| Convention/Conf. | 91,100 | 29,902 | 25,344 | 76,671 | 25,344 | 202.5% |
| Corp. Meetings | 42,499 | 11,246 | 16,185 | 36,944 | 16,185 | 128.3% |
| Incentive | 25,831 | 8,146 | 12,917 | 25,827 | 12,917 | 99.9% |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

U.S. East

| U.S. EAST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------------------|-----------|---------|-----------|-------------------|------------------|-----------------|
| Group vs True Independent (Net) | | | | | | |
| Group Tour | 76,041 | NA | 35,426 | 74,198 | 35,426 | 109.4% |
| True Independent (Net) | 1,837,972 | NA | 1,679,991 | 2,051,513 | 1,679,991 | 22.1% |
| Leisure vs Business | | | | | | |
| Pleasure (Net) | 1,834,556 | 503,113 | 1,678,144 | 2,025,737 | 1,678,144 | 20.7% |
| MCI (Net) | 138,967 | 45,507 | 39,120 | 118,973 | 39,120 | 204.1% |
| Convention/Conf. | 80,869 | 30,409 | 16,246 | 62,475 | 16,246 | 284.6% |
| Corp. Meetings | 29,980 | 8,866 | 10,770 | 29,776 | 10,770 | 176.5% |
| Incentive | 33,199 | 7,797 | 13,776 | 31,812 | 13,776 | 130.9% |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

First Time vs. Repeat Visitors

U.S. Total

| U.S. TOTAL (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|-------------------------|------|------|------|-------------------|------------------|-----------------|
| First Time Visitors (%) | 26.7 | NA | 29.1 | 27.8 | 29.1 | -1.3 |
| Repeat Visitors (%) | 73.3 | NA | 70.9 | 72.2 | 70.9 | 1.3 |

U.S. West

| U.S. WEST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|-------------------------|------|------|------|-------------------|------------------|-----------------|
| First Time Visitors (%) | 19.4 | NA | 21.5 | 20.7 | 21.5 | -0.8 |
| Repeat Visitors (%) | 80.6 | NA | 78.5 | 79.3 | 78.5 | 0.8 |

U.S. East

| U.S. EAST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|-------------------------|------|------|------|-------------------|------------------|-----------------|
| First Time Visitors (%) | 41.5 | NA | 46.2 | 43.0 | 46.2 | -3.2 |
| Repeat Visitors (%) | 58.5 | NA | 53.8 | 57.0 | 53.8 | 3.2 |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

Tax Revenue

U.S. Total

| U.S. TOTAL (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---|----------|------|----------|-------------------|------------------|-----------------|
| State tax revenue generated (\$ Millions) ^{2/} | 1,358.25 | NA | 1,437.81 | 1,875.27 | 1,437.81 | 30.4% |

^{2/}State government tax revenue generated (direct, indirect, and induced).

U.S. West

| U.S. WEST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---|--------|------|--------|-------------------|------------------|-----------------|
| State tax revenue generated (\$ Millions) ^{2/} | 811.48 | NA | 933.16 | 1,166.14 | 933.16 | 25.0% |

^{2/}State government tax revenue generated (direct, indirect, and induced).

U.S. East

| U.S. EAST MMA (by Air) | 2019 | 2020 | 2021 | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---|--------|------|--------|-------------------|------------------|-----------------|
| State tax revenue generated (\$ Millions) ^{2/} | 546.77 | NA | 504.66 | 709.13 | 504.66 | 40.5% |

^{2/}State government tax revenue generated (direct, indirect, and induced).