

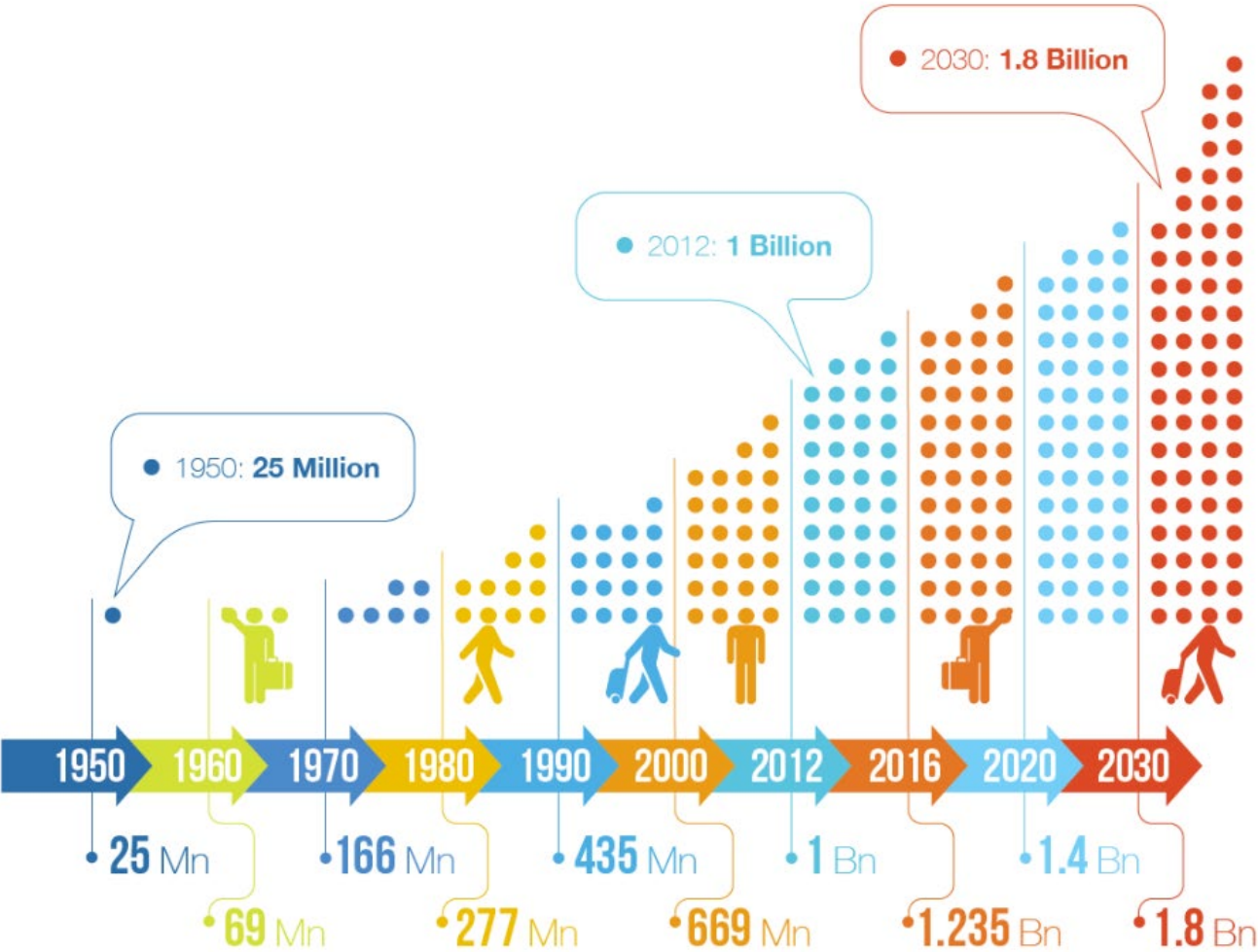
HAWAII TOURISM OVERVIEW

2019 Fall Update
November 19, 2019

HAWAII TOURISM
A horizontal line with a color gradient from red to blue.
AUTHORITY

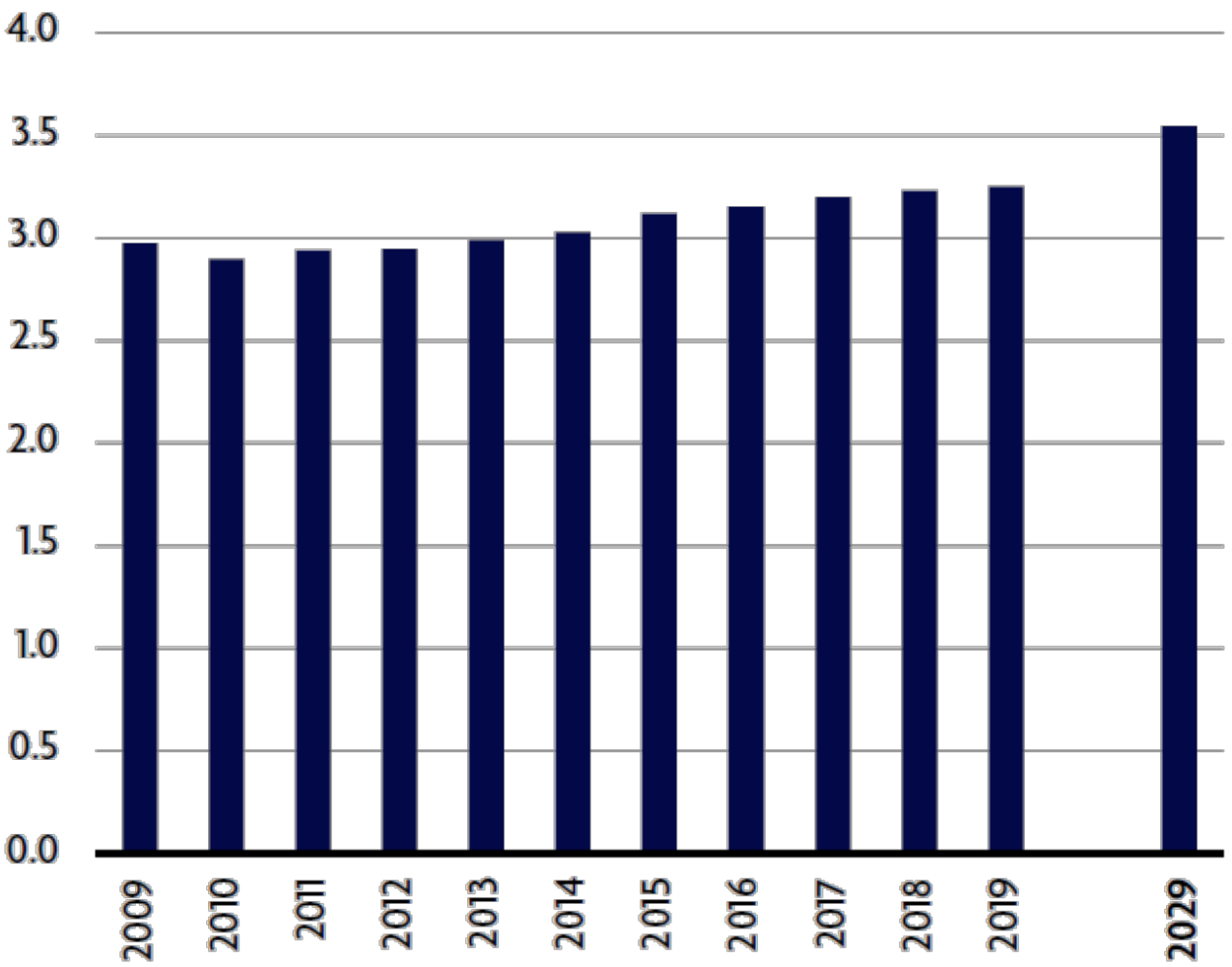
Tourism continues to expand

INTERNATIONAL TOURIST ARRIVALS 1950 - 2030



Source: World Tourism Organization (UNWTO)

% OF WHOLE ECONOMY GDP



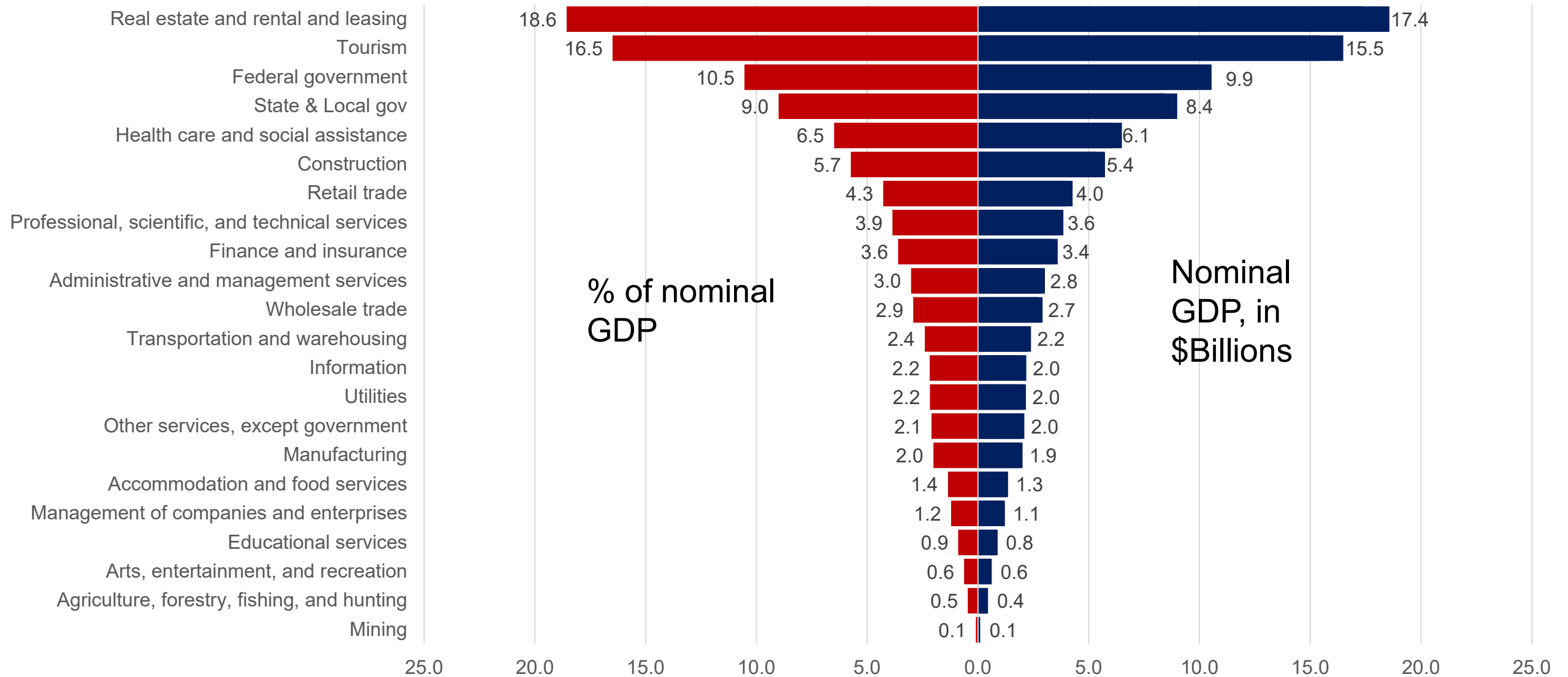
Source: World Travel & Tourism Council (WTTTC)

Hawai'i Tourism at a Glance

	2013	2014	2015	2016	2017R	2018	YTD Sept 2019P*
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$12.35B (-0.1%YOY)
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8)	\$1.41B (-5.1% YOY)
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	NA
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	7.1M (+5.2%YOY)
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	9.2M (+2.5%YOY)

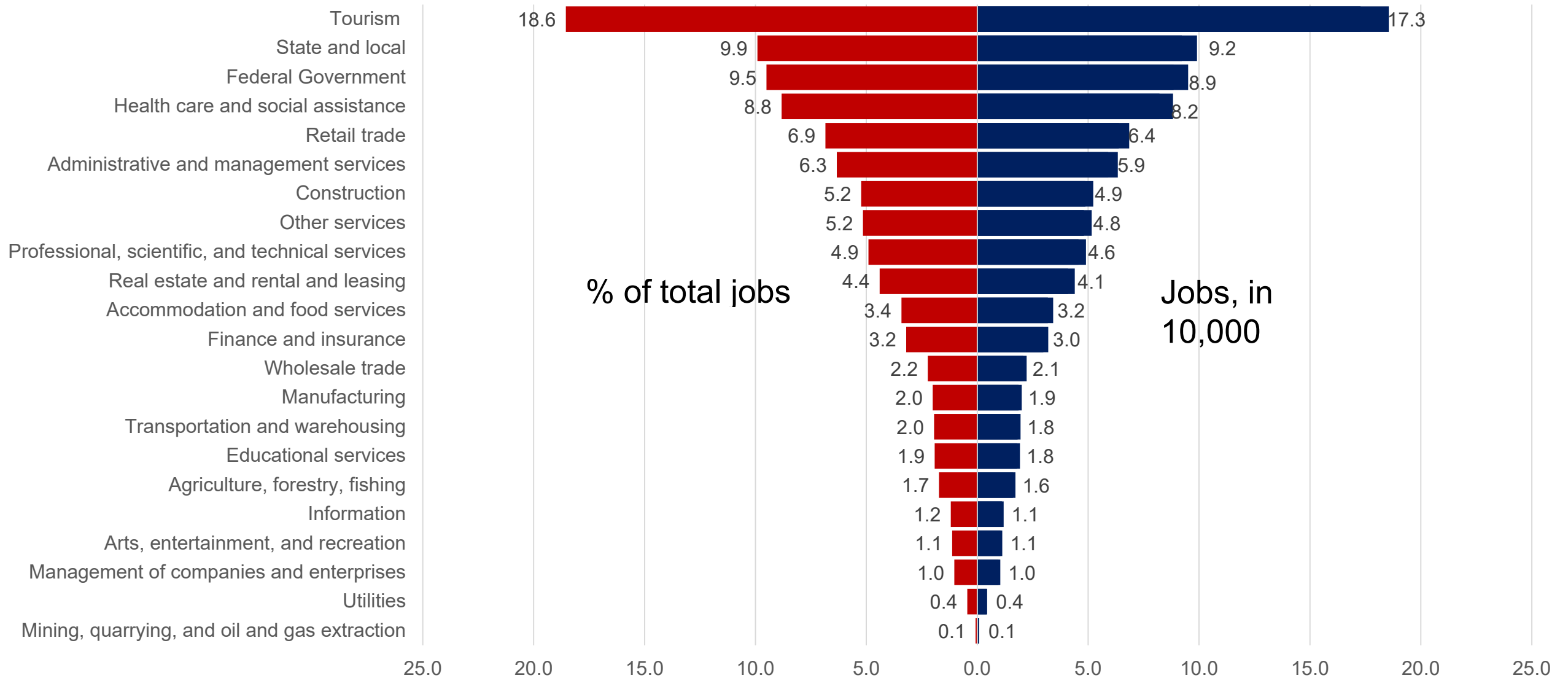
*2019 data are preliminary and does not include supplemental business spending

Hawaii GDP by Industry: 2018 (in current dollars)



Source: U.S. Bureau of Economic Analysis and DBEDT

Hawaii Jobs by Industry: 2018 (Includes payroll jobs and proprietors)

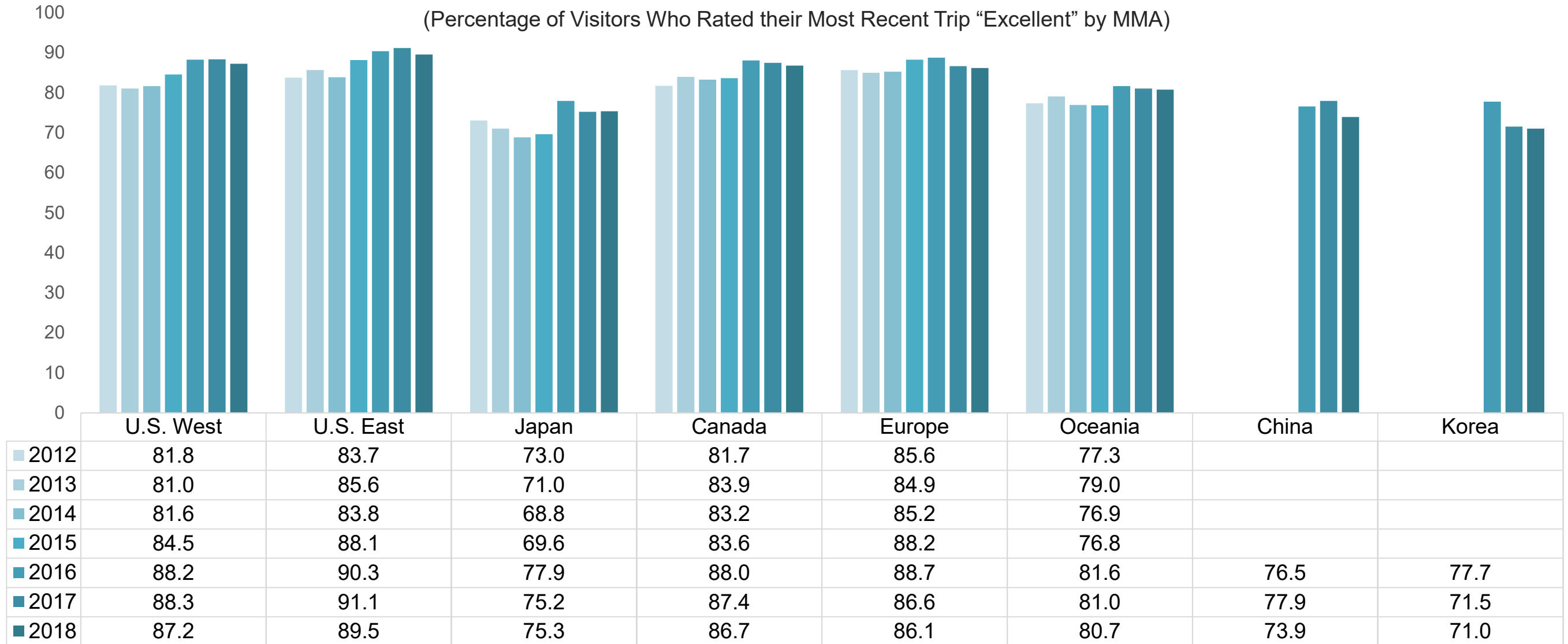


Source: U.S. Bureau of Economic Analysis and DBEDT

Visitor Satisfaction & Activity Survey

Overall Rating of Trip

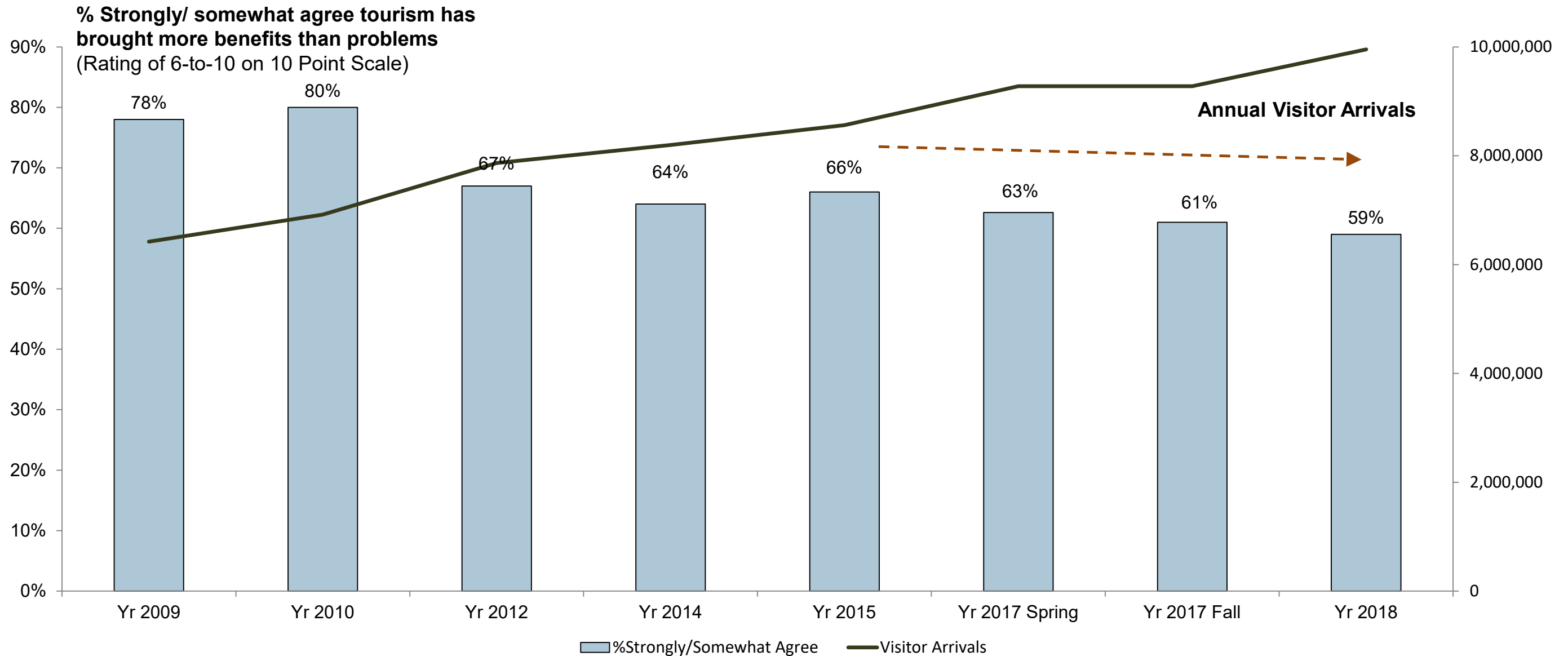
(Percentage of Visitors Who Rated their Most Recent Trip "Excellent" by MMA)



Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

<https://www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

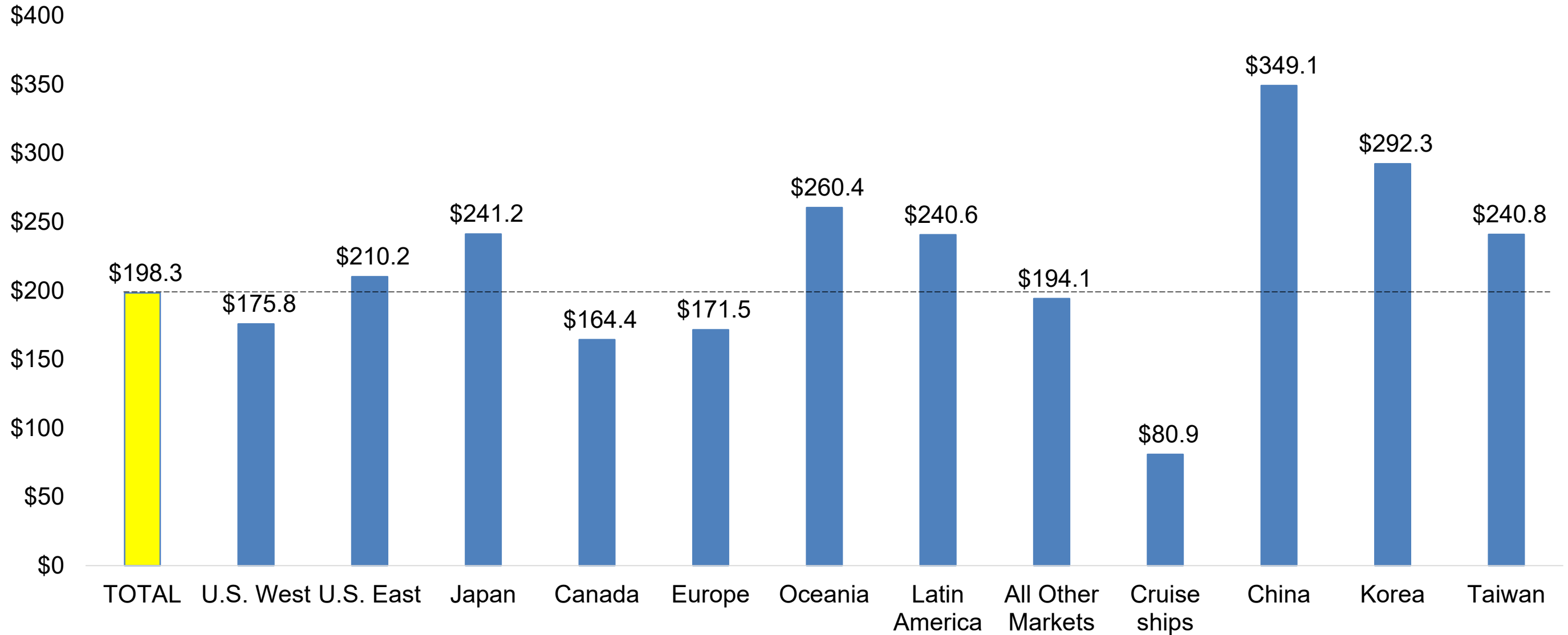
Resident Sentiment “Tourism has brought more benefits than problems”



Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

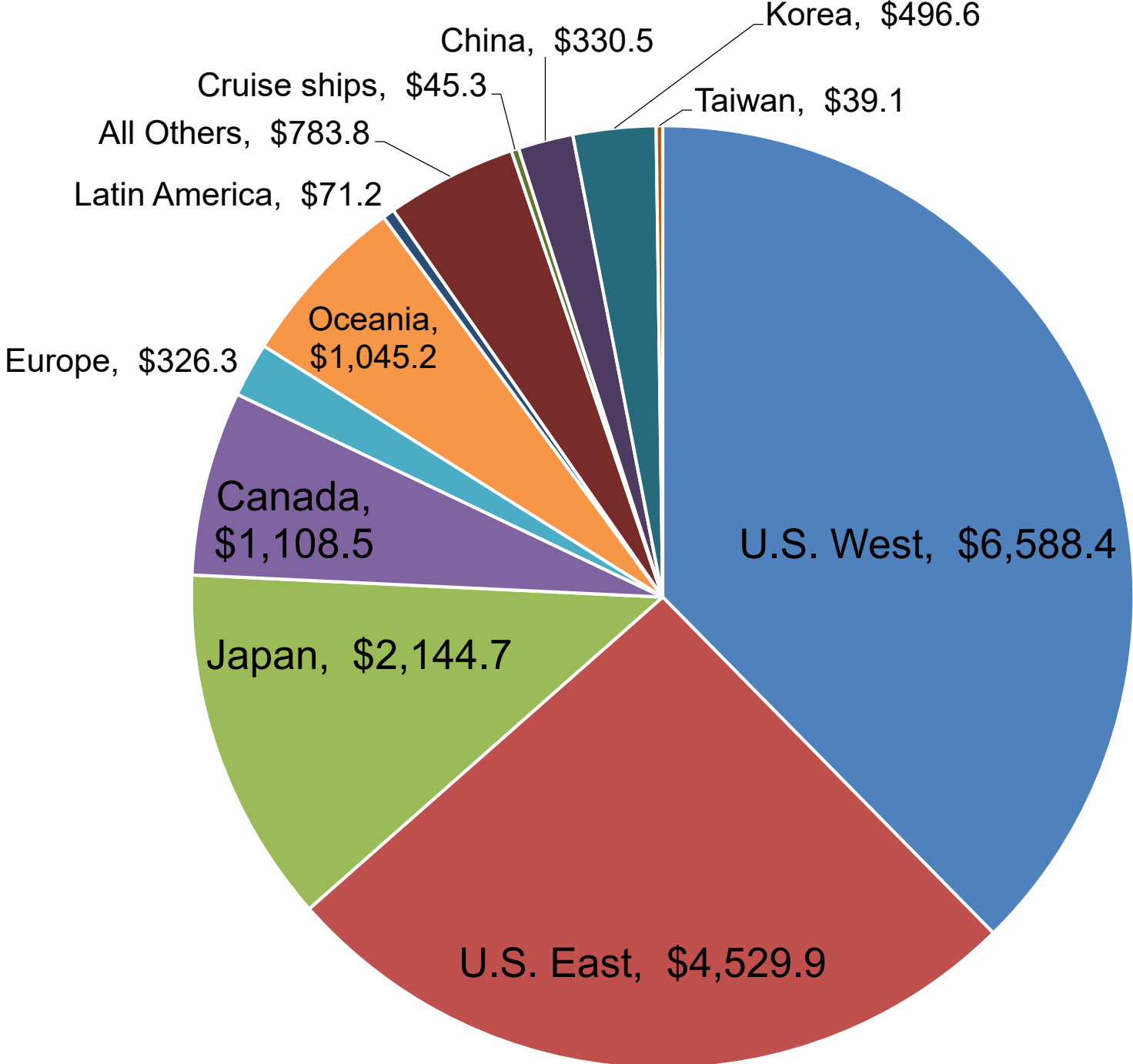
<https://www.hawaiitourismauthority.org/research/evaluation-performance-measures/>

Personal Daily Spending by Market – 2018



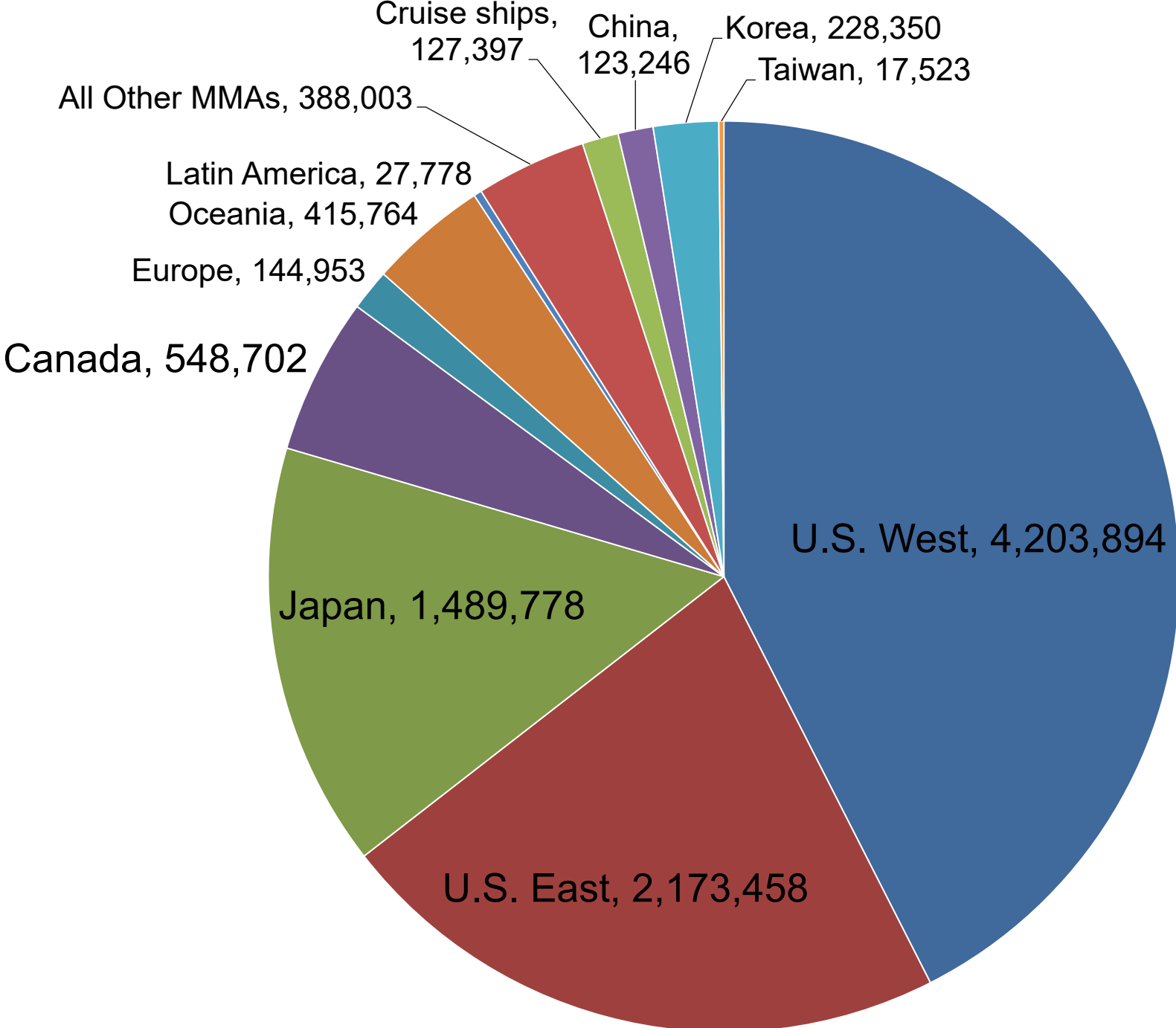
<https://www.hawaiitourismauthority.org/research/annual-visitor-research-reports/>

Visitor Expenditures by Market - 2018

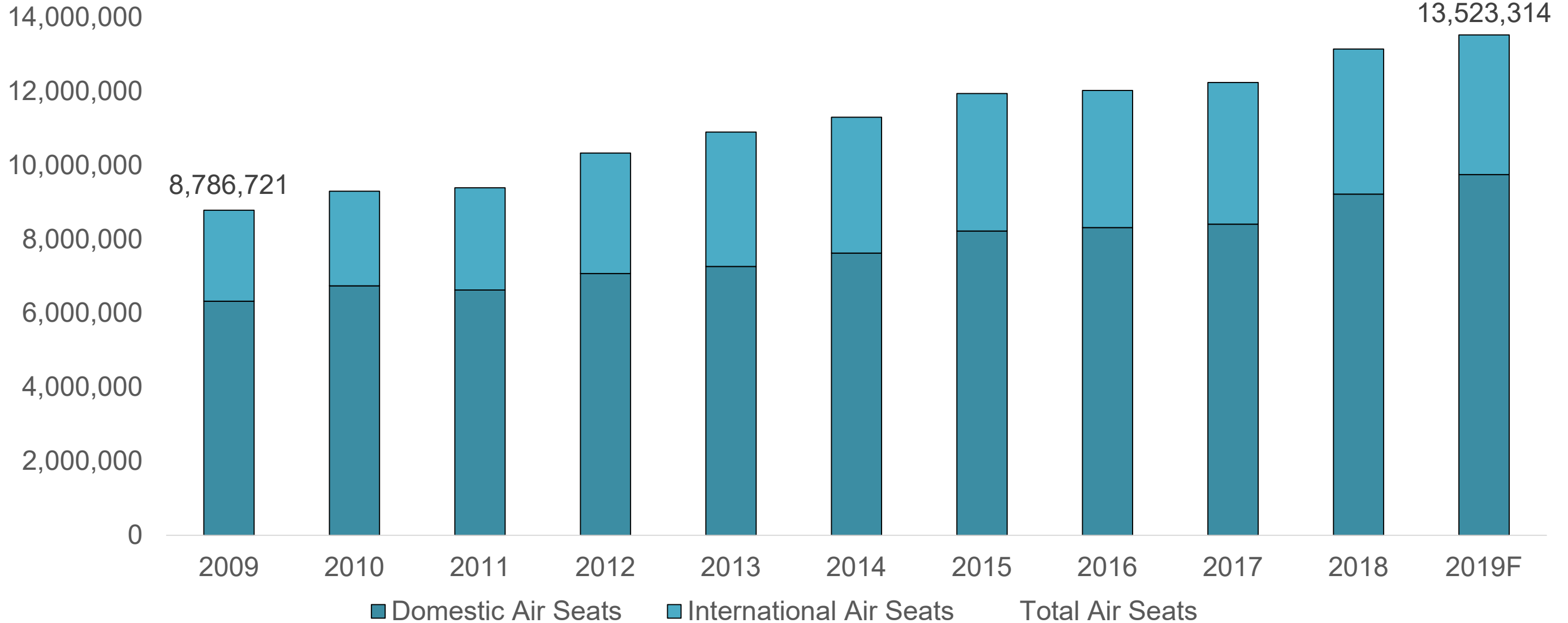


Millions of dollars

Arrivals to Hawai'i by Market - 2018



Direct Air Service to Hawai'i



Source: Diio Mi

Domestic Air Seats by Carrier 2018 vs 2019

	2018	2019 (forecast)	Volume Change	Percent Change
Alaska Airlines	1,689,975	1,770,772	+80,797	+4.8%
American Airlines	1,420,718	1,425,763	+5,045	+0.4%
Delta Air Lines	1,195,571	1,137,366	-58,205	-4.9%
Hawaiian Airlines	2,268,013	2,352,206	+84,193	+3.7%
Southwest Airlines		284,025	N/A	N/A
Sun Country	16,632	47,139	+30,507	+183.4%
United Airlines	2,628,724	2,728,919	+100,195	+3.8%
TOTAL	9,219,633	9,746,190	+526,557	+5.7%

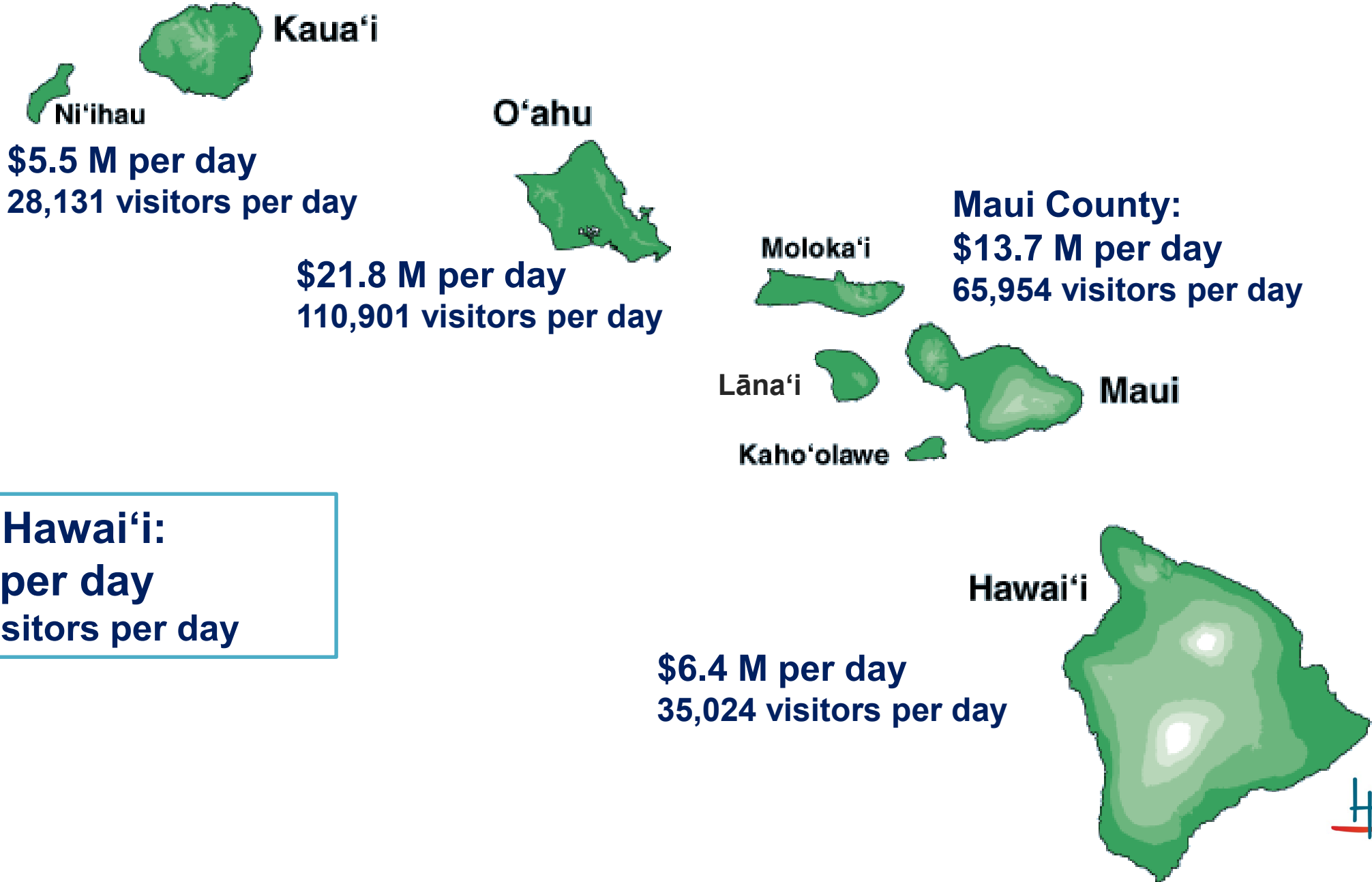
Source: Diio Mi

International Air Seats by Carrier 2018 vs 2019

	2018	2019F	Volume Change	Percent Change
Air Canada	191,189	183,905	-7,284	-3.8%
Air China	39,329	24,941	-14,388	-36.6%
Air New Zealand	91,933	69,700	-22,233	-24.2%
AirAsia X	101,036	129,311	+28,275	+28.0%
All Nippon Airways	266,518	346,915	+80,397	+30.2%
Asiana Airlines	100,268	85,999	-14,269	-14.2%
China Airlines	33,973	39,780	+5,807	+17.1%
China Eastern Airlines	86,144	91,598	+5,454	+6.3%
Delta Air Lines	321,128	253,120	-68,008	-21.2%
Fiji Airways	23,244	23,352	+108	+0.5%
Hawaiian Airlines	828,556	799,250	-29,306	-3.5%
Japan Airlines	617,008	571,059	-45,949	-7.4%
Jetstar Airways	153,430	141,035	-12,395	-8.1%
Jin Air	42,444	26,724	-15,720	-37.0%
Korean Airlines	237,195	239,776	+2,581	+1.1%
Philippine Airlines	70,154	73,248	+3,094	+4.4%
Qantas Airways	82,796	85,355	-2,559	+3.1%
Scot	69,325	25,029	-44,296	-63.9%
United Airlines	265,531	266,319	+788	+0.3%
WestJet	297,668	300,708	+3,040	+1.0%
TOTAL	3,918,869	3,777,124	-141,653	-3.6%

Tourism Impacts by County – 2018

Direct Visitor Spending (\$ millions) and Average Daily Census



State of Hawai'i:
\$48.3 M per day
240,341 visitors per day

Island of Hawai'i



72% / \$261.43

OCC/ADR

27.5%

Group/Package



200,983

Residents

4.6%

MCI



1,706,218 15.4%

Visitors

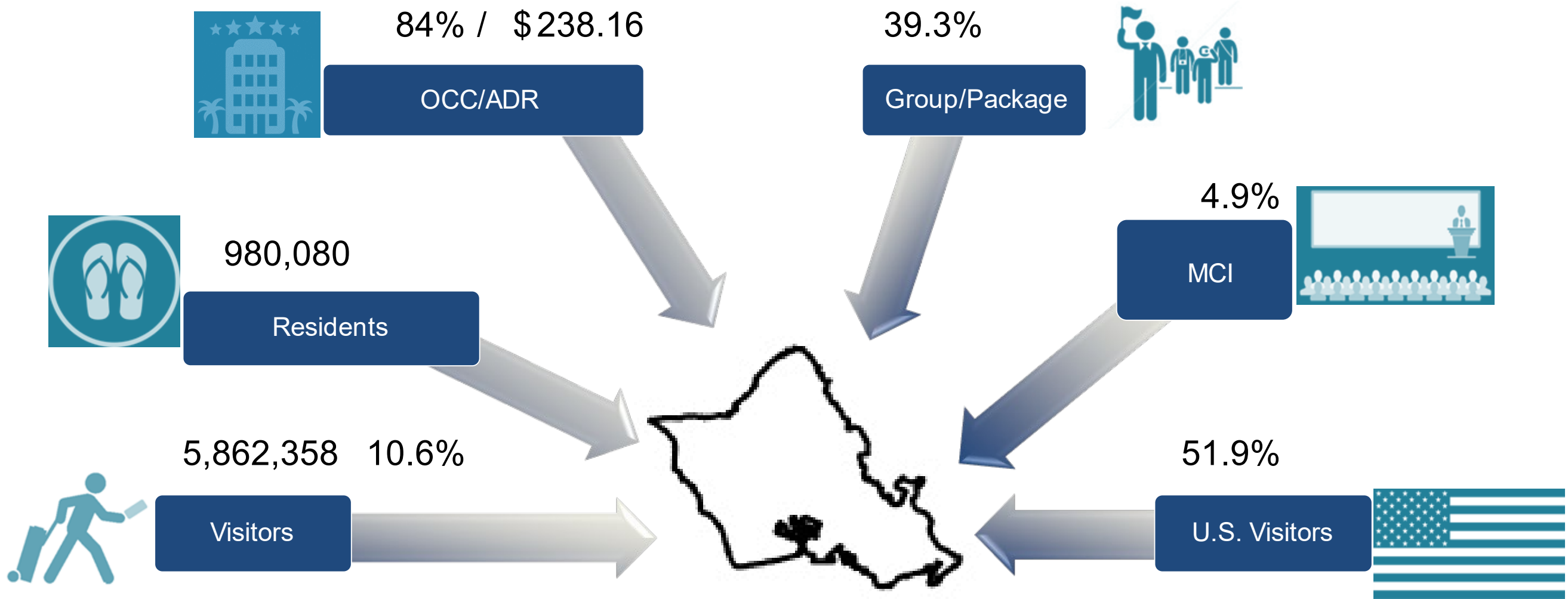


69.4%

U.S. Visitors



O'ahu



Maui



76% / \$ 385.39

OCC/ADR

24.4%

Group/Package



156,375

Residents

4.7%

MCI

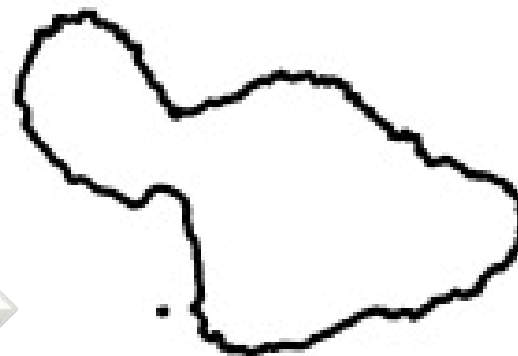


2,914,912 30.2%

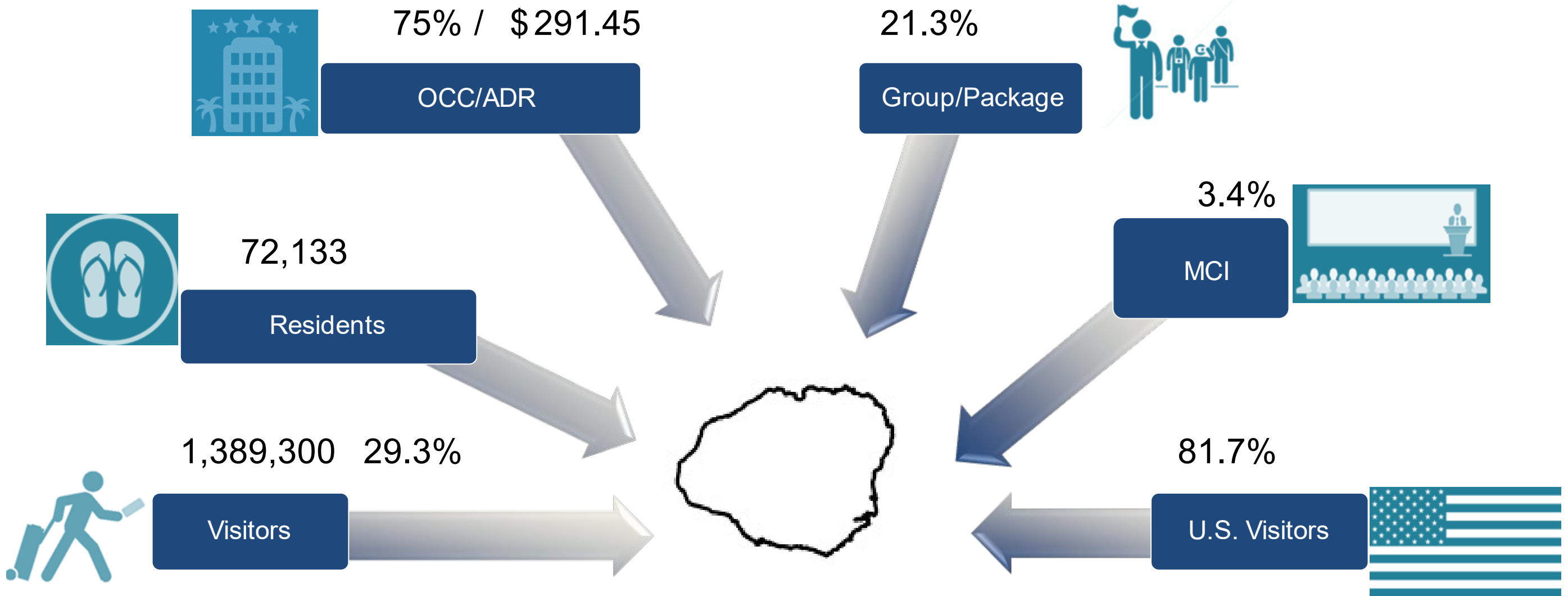
Visitors

78.1%

U.S. Visitors

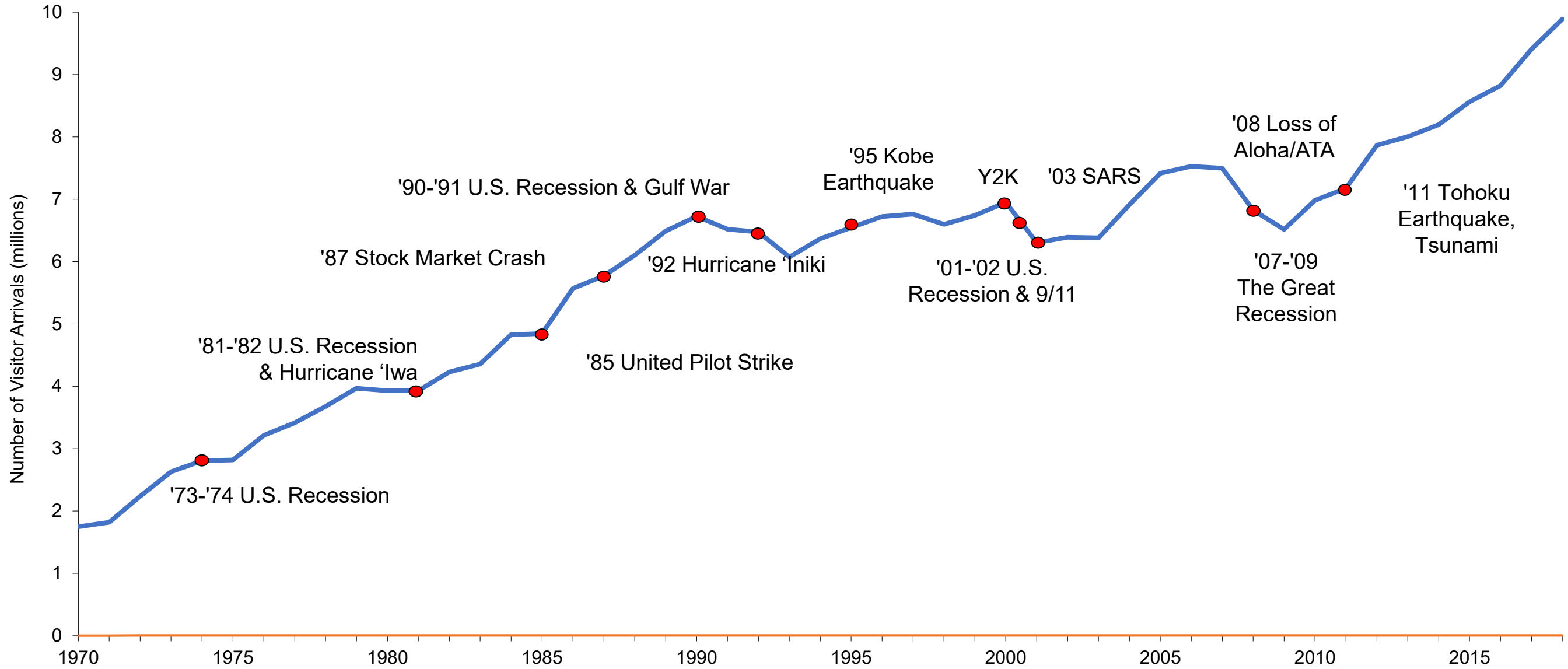


Kaua'i



Hawai'i Tourism is Susceptible to Global Events and Resilient

Visitor Arrivals to the State of Hawai'i 1970 - 2018



Tools & Resources

WHO WE ARE WHAT WE DO **RESEARCH** RFPS NEWS

HAWAIIAN CULTURE
Kukulu Ola helps perpetuate Hawaiian language in communities statewide

- Monthly Visitor Statistics
- Annual Visitor Research Reports
- Infrastructure Research
- Visitor Plant Inventory
- Evaluation & Performance Measures
- Visitor Satisfaction and Activity
- Historical Visitor Statistics
- Other Research
- Glossary
- Tourism Forecast (DBEDT)
- Daily Passenger Counts (DBEDT)
- Tourism Dashboard (DBEDT)

<https://www.hawaiitourismauthority.org/research/>

Registration Now How to Enjoy the al Experiences Supporting

Tools & Resources

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Association Forum December Showcase »

12/1/2020 - 12/31/2020

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12/1/2020 - 12/31/2020

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12/1/2020 - 12/31/2020

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Japan

Aloha Program Satellite office FAM »

12/1/2020 - 12/24/2020

Add Opportunity

<https://www.hawaiitourismauthority.org/what-we-do/partner-opportunities/>

Tools & Resources

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[Marketing & Promotion Resources »](#)

[Business Planning Resources »](#)

[Festivals & Event Resources »](#)

[Sponsored Programs/Events Resources »](#)

[Maemae Tool Kit - Cultural Resource Guide »](#)

[2018 Global Tourism Summit Presentations »](#)

[2019 Spring Update Presentations »](#)

Tools & Resources

HTA supports the growth and success of Hawaii's businesses and community organizations in tourism. HTA provides tools and resources to assist in your destination brand marketing and product development efforts.

Marketing & Promotion Resources

For businesses wanting to participate in our world-wide tourism marketing opportunities, digital images to market the destination, and resources to authentically promote Hawaii.

Business Planning Resources

For those seeking information on starting a business in Hawaii and other resources.

Festivals & Event Resources

For festival/event organizers to develop and enhance their festival or event.

Sponsored Programs/Event Resources

For programs and events that receive HTA funding. Here you will find report templates, sample documents and other resources.

Maemae Tool Kit - Cultural Resource Guide

For those seeking essential information needed to authentically promote Hawaii. The Maemae Tool Kit includes Hawaiian language tools, a Style and Resources Guide, a list of cultural activities and festivals and other pertinent information about our destination.

<https://www.hawaiitourismauthority.org/what-we-do/tools-resources/>

MAHALO!

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