



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, with domestic air seats accounting for 70 percent of total seats to the state in 2019. The U.S. West market includes visitors who travel to the Hawaiian Islands from the 12 U.S. states west of the Rockies, and U.S. East includes all other states.

Interest in Hawai'i is expected to remain steady, coupled with strong airlift from the U.S. mainland. HTA continues to work with the Hawai'i Visitors & Convention Bureau to market and promote Hawai'i to reach the "avid travelers" and now the "avid explorers." In 2020, activities occurring in the market include: 1) New York City market activation involving out-of-home, digital, social, travel trade and influencer events; 2) continuation of the 'Hawai'i Rooted' campaign to integrate visitor engagement opportunities and change perceptions by sharing our unique culture and activities available to visitors; and 3) promotion of the *Kuleana* messages designed to increase visitors' safety and shape their behavior while on-island.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures:	\$11.67 billion
Primary Purpose of Stay:	Pleasure (5,727,363) vs. MCI (293,558)
Average Length of Stay:	8.99 days
First Time Visitors:	26.7%
Repeat Visitors:	73.3%

U.S. Total

	2018	2017R	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
U.S. TOTAL (by Air)								
Visitor Expenditures* (\$ Millions)	11,118.3	10,376.2	7.2%	11,393.3	2.5%	11,669.9	11,118.3	5.0%
Visitor Days	59,030,584	55,526,298	6.3%	60,525,018	2.5%	61,830,056	59,030,584	4.7%
Arrivals	6,377,352	5,908,989	7.9%	6,747,782	5.8%	6,879,214	6,377,352	7.9%
Per Person Per Day Spending* (\$)	188.3	186.9	0.8%	188.2	-0.1%	188.7	188.3	0.2%
Per Person Per Trip Spending* (\$)	1,743.4	1,756.0	-0.7%	1,688.4	-3.2%	1,696.4	1,743.4	-2.7%
Length of Stay (days)	9.26	9.40	-1.5%	8.97	-3.1%	8.99	9.26	-2.9%

¹ 2019 visitor data are preliminary. 2018 and 2017R visitor data are the final numbers and reflect updated airfare statistics from DII O Mi Airline database, and final passenger counts for Airline reports.

U.S. West

			% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
U.S. WEST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	6,588.4	6,105.4	7.9%	6,831.5	3.7%	6,975.5	6,588.4	5.9%
Visitor Days	37,477,016	35,030,994	7.0%	38,902,121	3.8%	39,877,627	37,477,016	6.4%
Arrivals	4,203,894	3,868,195	8.7%	4,509,772	7.3%	4,614,203	4,203,894	9.8%
Per Person Per Day Spending* (\$)	175.8	174.3	0.9%	175.6	-0.1%	174.9	175.8	-0.5%
Per Person Per Trip Spending* (\$)	1,567.2	1,578.4	-0.7%	1,514.8	-3.3%	1,511.7	1,567.2	-3.5%
Length of Stay (days)	8.91	9.06	-1.6%	8.63	-3.2%	8.64	8.91	-3.1%

U.S. East

			% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
U.S. EAST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	4,529.9	4,270.8	6.1%	4,561.8	0.7%	4,694.4	4,529.9	3.6%
Visitor Days	21,553,568	20,495,303	5.2%	21,622,897	0.3%	21,952,430	21,553,568	1.9%
Arrivals	2,173,458	2,040,795	6.5%	2,238,010	3.0%	2,265,012	2,173,458	4.2%
Per Person Per Day Spending* (\$)	210.2	208.4	0.9%	211.0	0.4%	213.8	210.2	1.7%
Per Person Per Trip Spending* (\$)	2,084.2	2,092.7	-0.4%	2,038.3	-2.2%	2,072.6	2,084.2	-0.6%
Length of Stay (days)	9.92	10.04	-1.3%	9.66	-2.6%	9.69	9.92	-2.3%

*Excludes supplemental business spending

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Market Summary

U.S. West

- In 2018, arrivals rose 8.7 percent to 4,203,894 visitors, supported by expanded air service to the Neighbor Islands. Combined with higher daily spending (+0.9% to \$176 per person), U.S. West visitor expenditures grew 7.9 percent over 2017 to \$6.59 billion. In 2019, the U.S. West market reported a 5.9 percent gain in visitor spending to \$6.98 billion. Visitor arrivals (+9.8% to 4,614,203 visitors) and visitor days (+6.4%) increased but daily visitors spending was down slightly (-0.5% to \$175 per person) compared to 2018.
- Airlift: In 2018, the number of scheduled seats from U.S. West increased 10.7 percent compared to the previous year. In 2019, scheduled air seats grew 5.5 percent compared to 2018. Increased service from Long Beach (+70.6%), Oakland (+54.8%), Sacramento (+46.7%), Denver (+18.8%), Anchorage (+10.7%), San Jose (+10.1%), Seattle (+5.8%), San Diego (+5.5%), Portland (+5.0%), Las Vegas (+3.5%) and San Francisco (+2.3%) offset reduced service from Bellingham (-35.7%), Salt Lake City (-11.0%) and Los Angeles (-3.0%).

U.S. East

- In 2018, the U.S. East market reported a gain in visitor spending (+6.1% to \$4.53 billion), boosted by increases in visitor arrivals (+6.5% to 2,173,458) and higher average daily spending (+0.9% to \$210 per person). In 2019, spending by U.S. East visitors rose 3.6 percent to \$4.69 billion, boosted by growth in visitor arrivals (+4.2% to 2,265,012 visitors), visitor days (+1.9%) and increased daily visitor spending (+1.7% to \$214 per person) compared to 2018.
- Airlift: In 2018, scheduled seats were up 8.9 percent from 2017. In 2019, scheduled air seats were up 7.6 percent compared to the previous year. The addition of service from Boston (+58,380 seats, started April 2019) and Detroit (+13,168, started June 2019), and increased service from Chicago (+8.0%) and Dallas (+1.7%) offset reduced service from Minneapolis (-7.9%), Atlanta (-4.0%) and New York JFK (-1.9%).

Market Conditions

- Unemployment is forecast to continue at the current rate of about 3.9 percent. Low interest rates, which are lifting the housing market, will also buffer growth. Inflation-adjusted gross domestic product (real GDP), will remain positive but is expected to decelerate through the end of 2020.
- The Conference Board Consumer Confidence Index decreased marginally in December 2019 at 126.5, following a slight increase in November (126.8).
- The Travel Trends Index (TTI) report is consistent with those of recent months, with domestic travel outperforming international inbound travel. These trends are expected to continue through the first half of 2020, with domestic travel growing, but slowing, and international inbound travel declining slightly. This is also consistent with an outlook for the economic expansion continuing in 2020, although at a slightly more moderate pace, according to the U.S. Travel Association.
- The U.S. domestic carriers to Hawai'i for the months of January through March 2020 continue to operate on an expanded schedule for the winter season. U.S. non-stop seats for January are 843,040, a 10.4 percent increase over 2019. February and March seats are 785,549, and 904,058, respectively, a 15.6 percent and 8.1 percent increase over 2019. Much of the increase in capacity is due to the addition of Southwest.

- All U.S. domestic carriers have extended grounding of the Boeing MAX thorough April 2020. This continues to have impact on direct neighbor island service from the mainland as seen in route suspensions or decreased frequencies.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	3,043,894	2,847,442	6.9%	3,334,877	3,043,894	9.6%
Maui County	2,315,314	2,156,865	7.3%	2,487,649	2,315,314	7.4%
Maui	2,277,080	2,124,205	7.2%	2,447,917	2,277,080	7.5%
Moloka'i	41,167	38,397	7.2%	42,528	41,167	3.3%
Lāna'i	55,484	44,701	24.1%	60,283	55,484	8.6%
Kaua'i	1,134,420	1,050,451	8.0%	1,135,983	1,134,420	0.1%
Island of Hawai'i	1,183,715	1,192,268	-0.7%	1,252,873	1,183,715	5.8%

U.S. West

U.S. WEST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	1,795,039	1,658,938	8.2%	2,023,697	1,795,039	12.7%
Maui County	1,501,888	1,388,019	8.2%	1,643,069	1,501,888	9.4%
Maui	1,477,805	1,366,003	8.2%	1,617,933	1,477,805	9.5%
Moloka'i	24,176	22,959	5.3%	26,006	24,176	7.6%
Lāna'i	28,258	24,498	15.3%	32,286	28,258	14.3%
Kaua'i	719,930	660,128	9.1%	732,476	719,930	1.7%
Island of Hawai'i	729,244	714,425	2.1%	788,667	729,244	8.1%

U.S. East

U.S. EAST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	1,248,855	1,188,504	5.1%	1,311,180	1,248,855	5.0%
Maui County	813,426	768,846	5.8%	844,580	813,426	3.8%
Maui	799,275	758,202	5.4%	829,984	799,275	3.8%
Moloka'i	16,991	15,439	10.1%	16,522	16,991	-2.8%
Lāna'i	27,226	20,203	34.8%	27,997	27,226	2.8%
Kaua'i	414,489	390,323	6.2%	403,507	414,489	-2.6%
Island of Hawai'i	454,472	477,843	-4.9%	464,205	454,472	2.1%

Airlift

	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	1,980,931	2,196,965	2,235,504	2,150,895	8,564,295	1,961,773	2,071,414	2,098,475	1,989,340	8,121,002	1.0	6.1	6.5	8.1	5.5
Anchorage	29,764	15,741	14,628	27,685	87,818	26,235	14,628	14,628	23,850	79,341	13.5	7.6	0.0	16.1	10.7
Beillingham	10,494	954		0	11,448	10,176	0		7,632	17,808	3.1	NA		100.0	-35.7
Denver	79,820	97,006	98,072	102,804	377,702	78,390	79,261	80,132	80,132	317,915	1.8	22.4	22.4	28.3	18.8
Las Vegas	64,964	68,388	66,998	71,112	271,462	65,304	65,052	65,886	66,164	262,406	-0.5	5.1	1.7	7.5	3.5
Long Beach	17,010	17,199	17,388	17,388	68,985	0	5,670	17,388	17,388	40,446	NA	203.3	0.0	0.0	70.6
Los Angeles	604,098	705,462	726,420	628,714	2,664,694	647,820	730,161	746,372	622,183	2,746,536	-6.7	-3.4	-2.7	1.1	-3.0
Oakland	93,691	158,972	159,449	159,671	571,783	80,991	91,698	99,660	97,114	369,463	15.7	73.4	60.0	64.4	54.8
Phoenix	115,694	105,113	120,802	104,074	445,683	118,962	108,187	118,016	104,498	449,663	-2.7	-2.8	2.4	-0.4	-0.9
Portland	119,435	110,374	79,532	99,994	409,335	106,887	100,443	79,801	102,648	389,779	11.7	9.9	-0.3	-2.6	5.0
Sacramento	46,044	55,310	57,040	66,661	225,055	37,620	38,038	38,456	39,270	153,384	22.4	45.4	48.3	69.8	46.7
Salt Lake City	39,816	17,998	17,168	24,069	99,051	39,433	23,678	20,327	27,812	111,250	1.0	-24.0	-15.5	-13.5	-11.0
San Diego	85,914	89,879	94,264	90,556	360,613	66,360	86,828	97,903	90,664	341,755	29.5	3.5	-3.7	-0.1	5.5
San Francisco	335,296	385,376	403,951	379,986	1,504,609	348,943	382,572	377,092	361,713	1,470,320	-3.9	0.7	7.1	5.1	2.3
San Jose	74,158	103,154	115,532	112,798	405,642	83,191	98,420	97,028	89,692	368,331	-10.9	4.8	19.1	25.8	10.1
Seattle	264,733	266,039	264,260	265,383	1,060,415	251,461	246,778	245,786	258,580	1,002,605	5.3	7.8	7.5	2.6	5.8
US EAST	298,648	297,809	313,399	272,639	1,182,495	295,707	286,114	281,065	235,745	1,098,631	1.0	4.1	11.5	15.7	7.6
Atlanta	26,954	22,386	22,112	21,894	93,346	26,041	22,971	22,632	25,601	97,245	3.5	-2.5	-2.3	-14.5	-4.0
Boston		18,904	21,128	18,348	58,380		0	0	0	0		NA	NA	NA	NA
Chicago	67,218	51,550	53,872	55,094	227,734	56,784	56,784	52,052	45,162	210,782	18.4	-9.2	3.5	22.0	8.0
Dallas	95,004	96,096	99,099	83,274	373,473	99,264	99,180	99,099	69,615	367,158	-4.3	-3.1	0.0	19.6	1.7
Detroit		492	10,332	2,344	13,168		0	0	0	0		NA	NA	NA	NA
Houston	32,760	33,124	33,488	33,488	132,860	32,760	33,124	33,488	33,488	132,860	0.0	0.0	0.0	0.0	0.0
Minneapolis	21,682	17,021	12,054	3,223	53,980	24,236	15,559	12,656	6,135	58,586	-10.5	9.4	-4.8	-47.5	-7.9
New York JFK	25,512	25,298	25,576	27,544	103,930	26,496	25,298	25,576	28,528	105,898	-3.7	0.0	0.0	-3.4	-1.9
Newark	21,600	21,840	22,080	22,080	87,600	21,780	21,856	22,080	22,080	87,796	-0.8	-0.1	0.0	0.0	-0.2
Washington D.C.	7,918	11,098	13,658	5,350	38,024	8,346	11,342	13,482	5,136	38,306	-5.1	-2.2	1.3	4.2	-0.7

Source: Diio Mii airline schedules. Updated January 10, 2020.

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	145,939	-6.6%	142,754	136,310	4.7%
True Independent (Net)	5,233,615	4,768,826	9.7%	5,680,230	5,233,615	8.5%
Leisure vs business						
Pleasure (Net)	5,277,345	4,867,209	8.4%	5,727,363	5,277,345	8.5%
MCI (Net)	293,911	291,458	0.8%	293,558	293,911	-0.1%
Convention/Conf.	184,569	174,927	5.5%	172,010	184,569	-6.8%
Corp. Meetings	67,184	70,632	-4.9%	72,416	67,184	7.8%
Incentive	52,022	56,777	-8.4%	59,003	52,022	13.4%

U.S. West

U.S. WEST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	64,038	-1.7%	67,110	62,925	6.7%
True Independent (Net)	3,493,923	3,164,040	10.4%	3,852,022	3,493,923	10.2%
Leisure vs business						
Pleasure (Net)	3,524,847	3,236,260	8.9%	3,901,869	3,524,847	10.7%
MCI (Net)	156,181	149,019	4.8%	155,056	156,181	-0.7%
Convention/Conf.	96,954	89,460	8.4%	91,375	96,954	-5.8%
Corp. Meetings	39,528	39,850	-0.8%	42,571	39,528	7.7%
Incentive	24,371	24,749	-1.5%	25,917	24,371	6.3%

U.S. East

U.S. EAST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	81,901	-10.4%	75,644	73,384	3.1%
True Independent (Net)	1,739,692	1,604,786	8.4%	1,828,208	1,739,692	5.1%
Leisure vs business						
Pleasure (Net)	1,752,498	1,630,949	7.5%	1,825,494	1,752,498	4.2%
MCI (Net)	137,730	142,438	-3.3%	138,502	137,730	0.6%
Convention/Conf.	87,615	85,467	2.5%	80,635	87,615	-8.0%
Corp. Meetings	27,655	30,782	-10.2%	29,845	27,655	7.9%
Incentive	27,651	32,028	-13.7%	33,086	27,651	19.7%

First Timers vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	26.7	27.0	-0.3	26.7	26.7	0.0
Repeaters (%)	73.3	73.0	0.3	73.3	73.3	0.0

U.S. West

U.S. WEST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	19.0	19.0	0.0	19.4	19.0	0.4
Repeaters (%)	81.0	81.0	0.0	80.6	81.0	-0.4

U.S. East

U.S. EAST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	41.5	42.1	-0.6	41.6	41.5	0.1
Repeaters (%)	58.5	57.9	0.6	58.4	58.5	-0.1

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,211.17	7.2%	1,362.17	1,297.79	5.0%

*State government tax revenue generated (direct, indirect, and induced)

U.S. West

U.S. WEST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	769.04	712.66	7.9%	814.22	769.04	5.9%

*State government tax revenue generated (direct, indirect, and induced)

U.S. East

U.S. EAST MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	528.76	498.52	6.1%	547.95	528.76	3.6%

*State government tax revenue generated (direct, indirect, and induced)