



## 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 68 percent of total seats to the state in 2017. U.S. West includes visitors who travel to the Hawaiian Islands from the 12 Pacific states west of the Rockies, and U.S. East includes all other states.

Interest in Hawai'i is expected to remain strong, although value continues to be a deciding factor. The HTA continues to work with Hawai'i Tourism U.S.A. to market and promote Hawai'i to reach the "avid travelers" and now the "avid explorers." In 2017, some new activities occurring in the market include: 1) a New York City market activation involving out-of-home; digital, social, travel trade and influencer events; 2) evolution of the #LetHawaiiHappen – 'Journeys'; 3) use of 360 and Virtual Reality content for online marketing and training; 4) hosting of a Millennial Travel Professional Summit; 5) developing and refining tools and technology to reach meeting planners.

### July 2017 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$6.3 billion
Primary Purpose of Stay:	Pleasure (2,871,791) vs. MCI (203,516)
Average Length of Stay:	9.54 days
First Time Visitors:	27.1%
Repeat Visitors:	72.9%

### U.S. West

U.S. WEST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast (Feb. 2017)	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Visitor Expenditures* (\$ Millions)	5,275.7	5,602.2	6.2%	5,650.6	0.9%	3,660.2	3,292.3	11.2%
Visitor Days	32,561,688	33,497,107	2.9%	33,471,947	-0.1%	20,558,403	19,883,545	3.4%
Arrivals	3,507,652	3,658,380	4.3%	3,656,608	0.0%	2,241,484	2,161,586	3.7%
Per Person Per Day Spending* (\$)	162.0	167.2	3.2%	170.6	2.0%	178.0	165.6	7.5%
Per Person Per Trip Spending* (\$)	1,504.0	1,531.3	1.8%	1,545.3	0.9%	1,632.9	1,523.1	7.2%
Length of Stay (days)	9.28	9.16	-1.4%	9.15	0.0%	9.17	9.20	-0.3%

\*Excludes supplemental business spending

<sup>1</sup> 2016 and 2017 data are preliminary.

## U.S. East

U.S. EAST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	2017 Forecast (Feb. 2017)	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Visitor Expenditures* (\$ Millions)	3,674.6	3,845.3	4.6%	3,980.5	3.5%	2,664.0	2,358.3	13.0%
Visitor Days	18,580,408	19,097,032	2.8%	19,617,545	2.7%	12,787,746	11,948,300	7.0%
Arrivals	1,803,670	1,869,826	3.7%	1,921,265	2.8%	1,252,499	1,155,752	8.4%
Per Person Per Day Spending* (\$)	197.8	201.4	1.8%	204.4	1.5%	208.3	197.4	5.5%
Per Person Per Trip Spending* (\$)	2,037.3	2,056.5	0.9%	2,071.8	0.7%	2,127.0	2,040.5	4.2%
Length of Stay (days)	10.30	10.2	-0.9%	10.21	0.0%	10.2	10.3	-1.2%

\*Excludes supplemental business spending

## Contact Information

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## Market Summary

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### U.S. West

- In 2016, growth in arrivals (+4.3% to 3,658,380 visitors) and higher daily spending (+3.2% to \$167 per person) contributed to a 6.2% gain in visitor expenditures to \$5.6 billion. Through July 2017, increased in arrivals (+3.7% to 2,241,484 visitors) and higher daily spending (+7.5% to \$178 per person) led to a 11.2% growth in visitor expenditures to \$3.66 billion.
- Airlift: In 2016, air seats increased 1.5% to 7,324,285 compared to 7,217,348 in 2015 for U.S. West. The largest growth in inbound seat inventory were from San Francisco and Seattle. Through July 2017, scheduled seats from U.S. West dropped 2.5 percent from the first seven months of 2016.

### U.S. East

- In 2016, arrivals increased (+3.7% to 1,869,826 visitors) as did visitor expenditures (+4.6% to \$3.85 billion). Daily spending of \$201 per person (+1.8%) was higher compared to 2015. Through July 2017, visitor arrivals (+8.4% to 1,252,499 visitors), daily spending (+5.5% to \$208 per person) and visitor expenditures (+13% to \$2.66 billion) all exceeded year-to-date 2016.
- Airlift: For 2016, growth in scheduled air seats (-0.5% to 923,602) was flat in compared to 2015. Growth in seats out of Minneapolis, New York JFK and Houston were offset by fewer seats from Chicago, Atlanta and Dallas. Through July 2017, scheduled seats from U.S. East rose 14.2%.

## Market Conditions

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### Overall U.S.

- Despite widespread expectations of a decline, the U.S. Consumer Confidence Index jumped significantly in July 2017. Currently, the Index stands at 121.6 (1985=100), up +3.8 points from the revised June 2017 estimate. Improvements to both perceptions of the current economy and expectations for the future drove this increase.
- The U.S. unemployment rate ticked up slightly to 4.4 percent, an increase of +0.1 percent from May 2017. This bump is not particularly significant; overall, unemployment remains low and other indicators of the U.S. labor market changed little month-to-month.
- Between August and October 2017, U.S. airlift to Hawai'i is expected to increase +3.2 percent to an all-time high compared to the same period in 2016. A little over two million air seats are bound for Hawai'i from the U.S. mainland over the course of the next three months.
  - Capacity from the U.S. West market is once again expected to exceed 2016 levels throughout this period, with Denver (+11.4%) leading the percentage of capacity growth. Likewise, total air seats are also increasing from San Francisco (+7.8%), Los Angeles (+5.5%), and Seattle (+1.4%). Though gateways such as San Diego (-3.9%) and Oakland (-3.6%) are still shedding capacity, overall air seats are expected to increase by +3.3 percent from 2016 levels between August and October.
  - Meanwhile, capacity from the U.S. East market has also continued to grow, with August through October scheduled air seats up +2.7 percent from the previous year. Air seats from Chicago (+6.9%) and Houston (+5.8%) have increased by healthy margins, while the continuation of Delta's Minneapolis route through the summer months adds an additional +5,000 seats not flown last year.
- The continued weakening of the U.S. dollar, though it speaks to potential issues with the broader U.S. economy, should work to Hawai'i's advantage in the short term. The dollar exchange rates are currently more favorable towards making Hawai'i an affordable destination than it has been in

nearly a year. Conversely, increased geopolitical instability in the Pacific Region — the North Korean missile tests being of particular concern — could have a chilling effect on the Hawai'i visitor market. At this point, however, it remains unclear what effect, if any, these conditions will bring about.

## Visitor Statistics

### U.S. West

	2015	2016P	% Change 2016P vs 2015	2017 Forecast (Feb. 2017)	% Change 2016P vs 2017 Forecast	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
U.S. WEST MMA (by Air)								
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\*Excludes supplemental business spending

### U.S. East

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## Distribution by Island

### U.S. West

U.S. WEST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
O'ahu	1,525,939	1,567,646	2.7%	957,067	930,255	2.9%
Maui County	1,263,378	1,336,658	5.8%	801,234	781,723	2.5%
...Maui	1,244,689	1,314,432	5.6%	788,669	769,179	2.5%
...Moloka'i	26,145	25,521	-2.4%	13,323	14,742	-9.6%
...Lāna'i	22,422	25,800	15.1%	14,291	14,823	-3.6%
Kaua'i	603,519	619,321	2.6%	382,112	362,032	5.5%
Island of Hawai'i	631,224	649,422	2.9%	426,736	385,286	10.8%

### U.S. East

U.S. EAST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
O'ahu	1,072,333	1,089,757	1.6%	717,720	664,926	7.9%
Maui County	676,007	707,408	4.6%	478,114	441,942	8.2%
...Maui	665,964	695,708	4.5%	471,622	434,843	8.5%
...Moloka'i	18,996	14,932	-21.4%	9,114	9,528	-4.3%
...Lāna'i	17,727	20,212	14.0%	12,146	11,856	2.5%
Kaua'i	344,210	354,150	2.9%	240,144	218,058	10.1%
Island of Hawai'i	400,979	413,937	3.2%	293,879	258,106	13.9%

## Airlift

DepCity	2017					2016					CHANGE2017 vs. 2016 (%)				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>US WEST</b>	<b>1,717,254</b>	<b>1,837,080</b>	<b>1,943,653</b>	<b>1,817,441</b>	<b>7,315,428</b>	<b>1,789,501</b>	<b>1,864,300</b>	<b>1,916,172</b>	<b>1,754,312</b>	<b>7,324,285</b>	<b>-4.0%</b>	<b>-1.5%</b>	<b>1.4%</b>	<b>3.6%</b>	<b>-0.1%</b>
Anchorage	25,758	15,105	13,674	17,013	71,550	27,058	15,648	13,366	16,827	72,899	-4.8%	-3.5%	2.3%	1.1%	-1.9%
Bellingham	10198	318		6519	17,035	16789	9454		6376	32,619	-39.3%	-96.6%		2.2%	-47.8%
Denver	55,803	51,654	52,585	43,290	203,332	37,711	43,786	42,633	43,478	167,608	48.0%	18.0%	23.3%	-0.4%	21.3%
Las Vegas	70,514	74,322	75,839	75,415	296,090	71,218	73,182	74,846	71,891	291,137	-1.0%	1.6%	1.3%	4.9%	1.7%
Los Angeles	548,935	647,498	715,338	647,703	2,559,474	566,998	656,656	700,502	601,033	2,525,189	-3.2%	-1.4%	2.1%	7.8%	1.4%
Oakland	84,571	104,810	116,015	90,703	396,099	90,998	108,098	125,824	89,400	414,320	-7.1%	-3.0%	-7.8%	1.5%	-4.4%
Phoenix	113,046	115,125	125,348	108,863	462,382	124,805	125,441	126,852	116,476	493,574	-9.4%	-8.2%	-1.2%	-6.5%	-6.3%
Portland	90,207	71,068	65,997	81,673	308,945	95,402	72,934	68,880	83,900	321,116	-5.4%	-2.6%	-4.2%	-2.7%	-3.8%
Sacramento	37,620	38,318	38,456	38,456	152,850	38,402	38,402	38,824	38,624	154,252	-2.0%	-0.2%	-0.9%	-0.4%	-0.9%
Salt Lake City	26,370	23,751	22,968	28,322	101,411	23,751	23,751	21,402	26,060	94,964	11.0%	0.0%	7.3%	8.7%	6.8%
San Diego	67,164	73,242	76,179	70,455	287,040	69,297	75,165	81,327	70,824	296,613	-3.1%	-2.6%	-6.3%	-0.5%	-3.2%
San Francisco	282,082	308,568	339,052	310,546	1,240,248	298,387	309,314	320,519	291,519	1,219,739	-5.5%	-0.2%	5.8%	6.5%	1.7%
San Jose	68,414	81,072	89,413	82,593	321,492	82,183	88,154	90,464	83,378	344,179	-16.8%	-8.0%	-1.2%	-0.9%	-6.6%
Seattle	236,572	232,229	212,789	215,890	897,480	246,502	224,315	210,733	214,526	896,076	-4.0%	3.5%	1.0%	0.6%	0.2%
<b>US EAST</b>	<b>261,362</b>	<b>254,901</b>	<b>256,542</b>	<b>237,730</b>	<b>1,010,535</b>	<b>235,057</b>	<b>222,627</b>	<b>229,607</b>	<b>236,311</b>	<b>923,602</b>	<b>11.2%</b>	<b>14.5%</b>	<b>11.7%</b>	<b>0.6%</b>	<b>9.4%</b>
Atlanta	26,370	26,663	26,956	26,956	106,945	26,663	26,663	27,182	26,956	107,464	-1.1%	0.0%	-0.8%	0.0%	-0.5%
Chicago	36,120	37,456	36,764	41,132	151,472	34,033	35,776	34,400	40,592	144,801	6.1%	4.7%	6.9%	1.3%	4.6%
Dallas	79,026	79,211	85,792	71,306	315,335	65,738	69,806	70,851	65,928	272,323	20.2%	13.5%	21.1%	8.2%	15.8%
Houston	30,960	32,864	33,488	33,488	130,800	31,304	31,304	31,648	31,648	125,904	-1.1%	5.0%	5.8%	5.8%	3.9%
Minneapolis	24,612	22,561	12,306	13,478	72,957	21,271	0	0	15,319	36,590	15.7%	NA	NA	-12.0%	99.4%
New York JFK	39,094	25,298	25,576	26,116	116,084	27,250	26,166	27,048	28,386	108,850	43.5%	-3.3%	-5.4%	-8.0%	6.6%
Newark	19,130	19,474	19,688	19,688	77,980	21,538	22,022	22,264	20,948	86,772	-11.2%	-11.6%	-11.6%	-6.0%	-10.1%
Washington D.C.	6,050	11,374	15,972	5,566	38,962	7,260	10,890	16,214	6,534	40,898	-16.7%	4.4%	-1.5%	-14.8%	-4.7%

Source: Diio Mii airline schedules. Updated June 2017.

## Group vs. FIT; Leisure vs. Business

### U.S. West

U.S. WEST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Group vs FIT						
Group tour	64,081	63,032	-1.6%	42,450	40,069	5.9%
True Independent	2,838,902	2,978,339	4.9%	1,832,829	1,754,374	4.5%
Leisure vs business						
Pleasure (Net)	2,927,726	3,049,420	4.2%	1,873,861	1,803,903	3.9%
MCI (Net)	148,434	144,646	-2.6%	99,843	92,885	7.5%
Convention/Conf.	90,948	86,866	-4.5%	59,203	53,762	10.1%
Corp. Meetings	37,329	37,929	1.6%	25,662	24,479	4.8%
Incentive	25,785	25,141	-2.5%	18,637	18,190	2.5%

### U.S. East

U.S. EAST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
Group vs FIT						
Group tour	81,159	84,232	3.8%	57,269	52,890	8.3%
True Independent	1,399,790	1,451,828	3.7%	977,087	895,815	9.1%
Leisure vs business						
Pleasure (Net)	1,422,020	1,473,704	3.6%	997,930	914,876	9.1%
MCI (Net)	145,486	136,409	-6.2%	103,673	86,148	20.3%
Convention/Conf.	86,872	79,557	-8.4%	60,283	46,319	30.1%
Corp. Meetings	29,187	29,264	0.3%	22,093	19,841	11.4%
Incentive	36,252	34,036	-6.1%	25,809	23,867	8.1%

## First Timers vs. Repeat Visitors

### U.S. West

U.S. WEST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
1st timers (%)	18.8	19.0	1.3%	18.9	19.1	-0.2
Repeaters (%)	81.2	81.0	-0.3%	81.1	80.9	0.2

### U.S. East

U.S. EAST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
1st timers (%)	40.9	41.5	1.4%	41.7	40.8	0.9
Repeaters (%)	59.1	58.5	-1.0%	58.3	59.2	-0.9

## Tax Revenue

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### U.S. West

U.S. WEST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	561.86	653.92	16.4%	427.24	384.30	11.2%

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

### U.S. East

U.S. EAST MMA (by Air)	2015	2016P	% Change 2016P vs 2015	YTD Jul. 2017P	YTD Jul. 2016P	% change YTD
State tax revenue generated* (\$ Millions)	391.35	448.84	14.0%	310.96	275.27	13.0%

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

## Industry

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### Major Tour Operators

Presently, the top 10 tour operators for The Hawaiian Islands, based on room night production reports and confirmation from in-market supplier partners, are:

- Expedia
- Costco Travel
- Liberty/GoGo (Flight Center USA)
- Pleasant Holidays
- Travelocity
- Blue Sky Tours
- Funjet Vacations
- MLT/Delta Vacations
- Classic Vacations
- United Vacations