



## 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.

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

Visitor Expenditures:	\$8.6 billion
Primary Purpose of Stay:	Pleasure (3,979,852) vs. MCI (255,271)
Average Length of Stay:	9.41 days
First Time Visitors:	27.4%
Repeat Visitors:	72.6%

### U.S. West

	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
U.S. WEST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	5,275.7	5,634.1	6.8%	6,063.2	7.6%	5,065.4	4,610.0	9.9%
Visitor Days	32,561,688	33,552,091	3.0%	34,296,513	2.2%	28,588,611	27,631,048	3.5%
Arrivals	3,507,652	3,664,150	4.5%	3,748,097	2.3%	3,160,057	3,030,934	4.3%
Per Person Per Day Spending* (\$)	162.0	167.9	3.6%	176.8	5.3%	177.2	166.8	6.2%
Per Person Per Trip Spending* (\$)	1,504.0	1,537.6	2.2%	1,617.7	5.2%	1,602.9	1,521.0	5.4%
Length of Stay (days)	9.28	9.16	-1.4%	9.15	-0.1%	9.05	9.12	-0.8%

\*Excludes supplemental business spending

<sup>1</sup> 2016 visitor data are the final numbers and reflect data from the National Travel and Tourism Office and updated reports from airlines. 2017 data are preliminary.

## U.S. East

U.S. EAST MMA (by Air)	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
Visitor Expenditures* (\$ Millions)	3,674.6	3,889.4	5.8%	4,157.3	6.9%	3,559.0	3,216.6	10.6%
Visitor Days	18,580,408	19,283,520	3.8%	19,899,742	3.2%	16,888,963	16,081,141	5.0%
Arrivals	1,803,670	1,892,768	4.9%	1,960,448	3.6%	1,673,629	1,580,328	5.9%
Per Person Per Day Spending* (\$)	197.8	201.7	2.0%	208.9	3.6%	210.7	200.0	5.4%
Per Person Per Trip Spending* (\$)	2,037.3	2,054.9	0.9%	2,120.6	3.2%	2,126.5	2,035.4	4.5%
Length of Stay (days)	10.30	10.19	-1.1%	10.15	-0.4%	10.1	10.2	-0.8%

\*Excludes supplemental business spending

## Contact Information

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## Market Summary

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### U.S. West

- In 2016, growth in arrivals (+4.5% to 3,664,150 visitors) and higher daily spending (+3.6% to \$168 per person) contributed to a 6.8% gain in visitor expenditures to \$5.63 billion. Through October 2017, increased arrivals (+4.3% to 3,160,057 visitors) and higher daily spending (+6.2% to \$177 per person) led to a 9.9% growth in visitor expenditures to \$5.06 billion.
- Airlift: In 2016, air capacity from the U.S. West increased 1.5% to 7,324,285 seats. The largest growth in inbound seat inventory were from San Francisco and Seattle. Through October 2017, scheduled seats from U.S. West dropped 0.8 percent from the first ten months of 2016.

### U.S. East

- In 2016, arrivals increased (+4.9% to 1,892,768 visitors) as did visitor expenditures (+5.8% to \$3.89 billion). Daily spending of \$202 per person (+2.0%) was higher compared to 2015. Through October 2017, visitor arrivals (+5.9% to 1,673,629 visitors), daily spending (+5.4% to \$211 per person) and visitor expenditures (+10.6% to \$3.56 billion) all exceeded year-to-date 2016.
- Airlift: For 2016, there was no growth in scheduled air seats (-0.5% to 923,602) compared to 2015. Increased seats out of Minneapolis, New York JFK and Houston were offset by fewer seats from Chicago, Atlanta and Dallas. Through October 2017, scheduled seats from U.S. East rose 11% which increased service from Chicago, Dallas, Minneapolis and New York JFK.

## Market Conditions

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- The U.S. Consumer Confidence Index rose significantly in October 2017 to 125.9 (1980=100), up +5.3 points from the September estimate. This higher level of confidence can be attributed to more positive sentiments about the current economy as well as optimism for the future. The Conference Board cited the current job market as being a big driver for the upswing in consumer confidence.
- The U.S. unemployment rate dropped -0.2 points in September to 4.2 percent, the lowest it has been since the onset of the Great Recession in 2008. It should be noted that the current labor market has improved considerably from where it stood in September 2016.
- According to the most recently available data, airfares were up significantly in the second quarter of 2017. From April to June, the average cost of a roundtrip ticket between the U.S. mainland and Hawai'i was \$729. This is an increase of +6.1 percent quarter-over-quarter and +9.2 percent year-over-year.
  - Several factors must be considered to explain the jump in ticket prices. First is the cost of fuel. Though oil prices have remained both low and stable over the past twelve months, oil does cost more per barrel in 2017 than it did in the first half of last year.
  - The second key consideration is air seat capacity to the islands. Looking back at the second quarter of this year, the total air seat capacity from the U.S. mainland remained mostly stagnant, increasing only +0.2 percent from the year prior. Coupled with significant increases in demand, basic economic theory would suggest inflationary effects on prices.
  - On the upside, stability in oil markets, as well as increased air seat capacity in the third and fourth quarters of 2017, should allow airfares to level off or even decrease from where they stood in the second quarter.
- During the three month period November 2017 to January 2018, U.S. airlift to Hawai'i is expected to increase +7.3 percent compared to the same period in 2016. Nearly 2.2 million air seats are bound for Hawai'i from the U.S. mainland over the next three months.

- Capacity from the U.S. West market is once again expected to exhibit year-over-year growth throughout this period, with significant increases in seats flown from key gateways such as Denver (+17.9%), San Francisco (+16.1%), and Los Angeles (+10.8%). These gains should offset the minor declines in capacity from lesser gateways such as San Diego (-3.5%) and Las Vegas (-3.1%).
- Meanwhile, capacity from the U.S. East market will also grow, albeit at a slower rate than the West, with November through January scheduled air seats increasing +4.3 percent. While gateways like Chicago (+17.2%) and Dallas (+12.1%) are seeing large increases in air seats flown, these gains are partially offset by scaled-back capacity out of New York (-16.8%) and Washington D.C. (-11.6%), among other.

## Visitor Statistics

### U.S. West

U.S. WEST MMA (by Air)	2015	2016	% Change 2016 vs 2015	2017 Forecast (Aug. 2017)	% Change 2016 vs 2017 Forecast	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
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Length of Stay (days)	9.28	9.16	-1.4%	9.15	-0.1%	9.05	9.12	-0.8%

\*Excludes supplemental business spending

### U.S. East

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

## Distribution by Island

### U.S. West

U.S. WEST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
O'ahu	1,525,939	1,569,790	2.9%	1,349,004	1,298,617	3.9%
Maui County	1,263,378	1,336,006	5.7%	1,142,183	1,111,020	2.8%
...Maui	1,244,689	1,313,895	5.6%	1,124,776	1,092,967	2.9%
...Moloka'i	26,145	24,975	-4.5%	18,667	20,801	-10.3%
...Lāna'i	22,422	25,945	15.7%	19,897	21,192	-6.1%
Kaua'i	603,519	619,976	2.7%	546,396	515,045	6.1%
Island of Hawai'i	631,224	653,300	3.5%	577,522	530,951	8.8%

### U.S. East

U.S. EAST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
O'ahu	1,072,333	1,107,818	3.3%	963,875	920,990	4.7%
Maui County	676,007	712,079	5.3%	639,850	602,084	6.3%
...Maui	665,964	700,281	5.2%	631,221	592,477	6.5%
...Moloka'i	18,996	15,028	-20.9%	12,612	12,691	-0.6%
...Lāna'i	17,727	20,340	14.7%	16,717	16,770	-0.3%
Kaua'i	344,210	356,523	3.6%	325,697	302,699	7.6%
Island of Hawai'i	400,979	418,011	4.2%	394,182	350,193	12.6%

## 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	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
Group vs FIT						
Group tour	64,081	63,133	-1.5%	54,499	52,913	3.0%
True Independent	2,838,902	2,983,359	5.1%	2,570,771	2,453,413	4.8%
Leisure vs business						
Pleasure (Net)	2,927,726	3,055,254	4.4%	2,644,225	2,525,844	4.7%
MCI (Net)	148,434	144,691	-2.5%	128,042	127,484	0.4%
Convention/Conf.	90,948	86,920	-4.4%	75,900	77,300	-1.8%
Corp. Meetings	37,329	37,994	1.8%	34,277	32,616	5.1%
Incentive	25,785	25,057	-2.8%	22,489	22,411	0.4%

### U.S. East

U.S. EAST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
Group vs FIT						
Group tour	81,159	84,623	4.3%	70,627	68,688	2.8%
True Independent	1,399,790	1,471,734	5.1%	1,303,086	1,221,406	6.7%
Leisure vs business						
Pleasure (Net)	1,422,020	1,492,780	5.0%	1,335,627	1,248,346	7.0%
MCI (Net)	145,486	137,349	-5.6%	127,229	123,695	2.9%
Convention/Conf.	86,872	80,207	-7.7%	74,699	72,811	2.6%
Corp. Meetings	29,187	29,396	0.7%	27,821	26,204	6.2%
Incentive	36,252	34,285	-5.4%	30,281	30,829	-1.8%

## First Timers vs. Repeat Visitors

### U.S. West

U.S. WEST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
1st timers (%)	18.8	19.0	-0.2	19.4	19.4	-0.1
Repeaters (%)	81.2	81.0	0.2	80.6	80.6	0.1

### U.S. East

U.S. EAST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
1st timers (%)	40.9	41.5	-0.6	42.6	42.0	0.6
Repeaters (%)	59.1	58.5	0.6	57.4	58.0	-0.6

## Tax Revenue

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### U.S. West

U.S. WEST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
State tax revenue generated* (\$ Millions)	596.15	657.65	10.3%	591.26	538.11	9.9%

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

### U.S. East

U.S. EAST MMA (by Air)	2015	2016	% Change 2016 vs 2015	YTD Sep. 2017P	YTD Sep. 2016	% change YTD
State tax revenue generated* (\$ Millions)	415.23	453.99	9.3%	415.42	375.46	10.6%

\*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