



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.

January 2020 Quick Facts¹

Visitor Expenditures:	\$1.13 billion
Primary Purpose of Stay:	Pleasure (440,739) vs. MCI (41,983)
Average Length of Stay:	10.11 days
First Time Visitors:	23.5%
Repeat Visitors:	76.5%

U.S. Total

U.S. TOTAL (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	11,118.3	11,669.9	5.0%	NA	NA	1,129.1	1,022.0	10.5%
Visitor Days	59,030,584	61,830,056	4.7%	NA	NA	5,588,753	5,222,958	7.0%
Arrivals	6,377,352	6,879,214	7.9%	NA	NA	552,578	500,068	10.5%
Per Person Per Day Spending* (\$)	188.3	188.7	0.2%	NA	NA	202.0	195.7	3.2%
Per Person Per Trip Spending* (\$)	1,743.4	1,696.4	-2.7%	NA	NA	2,043.2	2,043.7	0.0%
Length of Stay (days)	9.26	8.99	-2.9%	NA	NA	10.11	10.44	-3.2%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

¹ 2020 and 2019 visitor data are preliminary. 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

U.S. West

U.S. WEST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	6,588.4	6,975.5	5.9%	NA	NA	621.7	558.8	11.2%
Visitor Days	37,477,016	39,877,627	6.4%	NA	NA	3,337,398	3,098,386	7.7%
Arrivals	4,203,894	4,614,203	9.8%	NA	NA	352,525	317,890	10.9%
Per Person Per Day Spending* (\$)	175.8	174.9	-0.5%	NA	NA	186.3	180.4	3.3%
Per Person Per Trip Spending* (\$)	1,567.2	1,511.7	-3.5%	NA	NA	1,763.4	1,757.9	0.3%
Length of Stay (days)	8.91	8.64	-3.1%	NA	NA	9.47	9.75	-2.9%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

U.S. East

U.S. EAST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Visitor Expenditures* (\$ Millions)	4,529.9	4,694.4	3.6%	NA	NA	507.4	463.2	9.6%
Visitor Days	21,553,568	21,952,430	1.9%	NA	NA	2,251,355	2,124,571	6.0%
Arrivals	2,173,458	2,265,012	4.2%	NA	NA	200,053	182,177	9.8%
Per Person Per Day Spending* (\$)	210.2	213.8	1.7%	NA	NA	225.4	218.0	3.4%
Per Person Per Trip Spending* (\$)	2,084.2	2,072.6	-0.6%	NA	NA	2,536.3	2,542.3	-0.2%
Length of Stay (days)	9.92	9.69	-2.3%	NA	NA	11.25	11.66	-3.5%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

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Market Summary

U.S. West

- 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. In January 2020, visitor spending rose 11.2 percent to \$621.7 million, boosted by growth in arrivals (+10.9% to 325,525 visitors), visitor days (+7.7%) and higher daily visitors spending (+3.3% to \$186 per person).
- Airlift: In 2019, scheduled air seats from U.S. West grew 5.5 percent compared to 2018. In January 2020, scheduled air seats rose 7.7 percent from January 2019. Increased service from Oakland (+73.5%), Sacramento (+53.3%), San Jose (+50.3%), Las Vegas (+12.1%), Denver (+8.3%), San Francisco (+7.2%) and Seattle (+6.9%), offset discontinued service from Bellingham (-3,657 seats), and reduced service from San Diego (-7.1%), Phoenix (-5.3%), Portland (-5.0%) and Los Angeles (-2.0%).

U.S. East

- In 2019, spending by U.S. East visitors rose 3.6 percent to \$4.69 billion. Visitor arrivals (+4.2% to 2,265,012 visitors), visitor days (+1.9%) increased and daily visitor spending was higher (+1.7% to \$214 per person) compared to 2018. In January 2020, spending by U.S. East visitors rose 9.6 percent to \$507.4 million, bolstered by growth in visitor arrivals (+9.8% to 200,053 visitors), visitor days (+6.0%) and increased daily visitor spending (+3.4% to \$225 per person) compared to last year.
- Airlift: In 2019, scheduled air seats from U.S. East rose 7.6 percent compared to 2018. In January 2020, scheduled air seats were up 29.4 percent compared to last January. The addition of service from Boston (+5,838 seats, started April 2019), seasonal service from Detroit (+1,172 seats) and increased service from Dallas (+45.4%) and Chicago (+41.9%), offset reduced service from Washington D.C. (-11.1%), Atlanta (-6.0%) and Minneapolis (-4.3%).

Market Conditions

- The growth rate for U.S. GDP, which measures the nation's production output is expected to fall below the two to three percent ideal range.
- The Conference Board Consumer Confidence Index increased in January 2020 to 131.6, up from 128.2 in December 2019. 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. economy may be somewhat insulated from impacts from the Coronavirus outbreak if the epidemic remains mostly confined to Asia. It has been suggested that the duration of the pandemic event will be less than six months.
- The U.S. domestic carriers to Hawai'i for the months of February through April 2020 continue to operate on an expanded schedule for the winter and spring season. U.S. non-stop seats for February are 785,638, a 15.6 percent increase over 2019. March and April seats are 906,050, and 857,054, respectively, a 8.3 percent and 10.2 percent increase over 2019. Much of the

increase in capacity is due to the addition of Southwest. In March, the airline will mark one year of service to Hawai'i.

- All U.S. domestic carriers have extended grounding of the Boeing MAX through June 2020 at the earliest. 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	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	3,043,894	3,334,877	9.6%	271,707	240,018	13.2%
Maui County	2,315,314	2,487,649	7.4%	189,479	174,131	8.8%
Maui	2,277,080	2,447,917	7.5%	185,594	170,697	8.7%
Moloka'i	41,167	42,528	3.3%	3,986	3,886	2.6%
Lāna'i	55,484	60,283	8.6%	4,466	4,224	5.7%
Kaua'i	1,134,420	1,135,983	0.1%	91,504	82,845	10.5%
Island of Hawai'i	1,183,715	1,252,873	5.8%	111,994	97,679	14.7%

U.S. West

U.S. WEST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	1,795,039	2,023,697	12.7%	159,121	140,630	13.1%
Maui County	1,501,888	1,643,069	9.4%	116,511	106,493	9.4%
Maui	1,477,805	1,617,933	9.5%	113,963	104,290	9.3%
Moloka'i	24,176	26,006	7.6%	2,405	2,333	3.1%
Lāna'i	28,258	32,286	14.3%	2,429	2,196	10.6%
Kaua'i	719,930	732,476	1.7%	54,988	48,355	13.7%
Island of Hawai'i	729,244	788,667	8.1%	69,086	60,201	14.8%

U.S. East

U.S. EAST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
O'ahu	1,248,855	1,311,180	5.0%	112,586	99,388	13.3%
Maui County	813,426	844,580	3.8%	72,967	67,638	7.9%
Maui	799,275	829,984	3.8%	71,631	66,407	7.9%
Moloka'i	16,991	16,522	-2.8%	1,582	1,553	1.9%
Lāna'i	27,226	27,997	2.8%	2,037	2,028	0.4%
Kaua'i	414,489	403,507	-2.6%	36,516	34,490	5.9%
Island of Hawai'i	454,472	464,205	2.1%	42,908	37,477	14.5%

Airlift

	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	2,190,599	2,393,482	2,314,122	2,073,381	8,971,584	1,980,931	2,196,965	2,235,504	2,150,895	8,564,295	10.6	8.9	3.5	-3.6	4.8
Anchorage	30,051	14,469	14,628	21,465	80,613	29,764	15,741	14,628	27,685	87,818	1.0	-8.1	0.0	-22.5	-8.2
Bellingham	0	0			0	10,494	954			11,448	100.0	100.0			-100.0
Denver	91,416	101,569	113,620	100,607	407,212	79,820	97,006	98,072	102,804	377,702	14.5	4.7	15.9	-2.1	7.8
Las Vegas	74,880	76,548	76,826	77,293	305,547	64,964	68,388	66,998	71,112	271,462	15.3	11.9	14.7	8.7	12.6
Long Beach	17,199	17,199	17,388	17,388	69,174	17,010	17,199	17,388	17,388	68,985	1.1	0.0	0.0	0.0	0.3
Los Angeles	605,255	721,476	749,963	632,403	2,709,097	604,098	705,462	726,420	628,714	2,664,694	0.2	2.3	3.2	0.6	1.7
Oakland	166,755	179,051	124,788	81,261	551,855	93,691	158,972	159,449	159,671	571,783	78.0	12.6	-21.7	-49.1	-3.5
Phoenix	112,794	108,354	100,808	101,837	423,793	115,694	105,113	120,802	104,074	445,683	-2.5	3.1	-16.6	-2.1	-4.9
Portland	118,526	103,535	98,012	101,873	421,946	119,435	110,374	79,532	99,994	409,335	-0.8	-6.2	23.2	1.9	3.1
Sacramento	76,475	74,198	49,126	34,776	234,575	46,044	55,310	57,040	66,661	225,055	66.1	34.1	-13.9	-47.8	4.2
Salt Lake City	42,785	18,919	17,313	25,662	104,679	39,816	17,998	17,168	24,069	99,051	7.5	5.1	0.8	6.6	5.7
San Diego	85,098	128,781	123,458	105,769	443,106	85,914	89,879	94,264	90,556	360,613	-1.0	43.3	31.0	16.8	22.9
San Francisco	360,570	398,337	387,196	371,357	1,517,460	335,296	385,376	403,951	379,986	1,504,609	7.5	3.4	-4.1	-2.3	0.9
San Jose	125,143	159,033	125,484	96,784	506,444	74,158	103,154	115,532	112,798	405,642	68.8	54.2	8.6	-14.2	24.8
Seattle	283,652	292,013	315,512	304,906	1,196,083	264,733	266,039	264,260	265,383	1,060,415	7.1	9.8	19.4	14.9	12.8
US EAST	352,583	301,425	300,071	282,548	1,236,627	298,648	297,809	313,399	272,639	1,182,495	18.1	1.2	-4.3	3.6	4.6
Atlanta	26,277	19,039	19,136	25,001	89,453	26,954	22,386	22,112	21,894	93,346	-2.5	-15.0	-13.5	14.2	-4.2
Boston	17,792	18,070	18,348	18,070	72,280	0	18,904	21,128	18,348	58,380	NA	-4.4	-13.2	-1.5	23.8
Chicago	78,754	62,296	53,144	53,014	247,208	67,218	51,550	53,872	55,094	227,734	17.2	20.8	-1.4	-3.8	8.6
Dallas	119,163	95,355	102,123	92,193	408,834	95,004	96,096	99,099	83,274	373,473	25.4	-0.8	3.1	10.7	9.5
Detroit	1,758	246	0	2,260	4,264	0	492	10,332	2,344	13,168	100.0	-50.0	NA	-3.6	-67.6
Houston	33,124	33,124	33,488	33,488	133,224	32,760	33,124	33,488	33,488	132,860	1.1	0.0	0.0	0.0	0.3
Minneapolis	19,675	14,397	10,816	2,938	47,826	21,682	17,021	12,054	3,223	53,980	-9.3	-15.4	-10.3	-8.8	-11.4
New York JFK	26,282	25,298	25,576	27,836	104,992	25,512	25,298	25,576	27,544	103,930	3.0	0.0	0.0	1.1	1.0
Newark	21,840	21,840	22,080	22,080	87,840	21,600	21,840	22,080	22,080	87,600	1.1	0.0	0.0	0.0	0.3
Washington D.C.	7,918	11,760	15,360	5,668	40,706	7,918	11,098	13,658	5,350	38,024	0.0	6.0	12.5	5.9	7.1

Source: Dilo Mii airline schedules. Updated February 26, 2020.

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	142,754	4.7%	12,449	11,264	10.5%
True Independent (Net)	5,233,615	5,680,230	8.5%	478,249	427,421	11.9%
Leisure vs business						
Pleasure (Net)	5,277,345	5,727,363	8.5%	440,739	394,945	11.6%
MCI (Net)	293,911	293,558	-0.1%	41,983	40,545	3.5%
Convention/Conf.	184,569	172,010	-6.8%	30,609	28,760	6.4%
Corp. Meetings	67,184	72,416	7.8%	7,577	8,149	-7.0%
Incentive	52,022	59,003	13.4%	4,933	4,819	2.4%

U.S. West

U.S. WEST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	67,110	6.7%	5,492	4,825	13.8%
True Independent (Net)	3,493,923	3,852,022	10.2%	309,584	275,642	12.3%
Leisure vs business						
Pleasure (Net)	3,524,847	3,901,869	10.7%	286,845	255,999	12.0%
MCI (Net)	156,181	155,056	-0.7%	20,885	20,684	1.0%
Convention/Conf.	96,954	91,375	-5.8%	14,770	14,218	3.9%
Corp. Meetings	39,528	42,571	7.7%	4,172	4,841	-13.8%
Incentive	24,371	25,917	6.3%	2,475	2,194	12.8%

U.S. East

U.S. EAST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	75,644	3.1%	6,958	6,438	8.1%
True Independent (Net)	1,739,692	1,828,208	5.1%	168,665	151,779	11.1%
Leisure vs business						
Pleasure (Net)	1,752,498	1,825,494	4.2%	153,893	138,946	10.8%
MCI (Net)	137,730	138,502	0.6%	21,097	19,860	6.2%
Convention/Conf.	87,615	80,635	-8.0%	15,839	14,541	8.9%
Corp. Meetings	27,655	29,845	7.9%	3,405	3,308	2.9%
Incentive	27,651	33,086	19.7%	2,458	2,625	-6.4%

First Timers vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	26.7	26.7	0.0	23.5	23.2	0.4
Repeaters (%)	73.3	73.3	0.0	76.5	76.8	-0.4

U.S. West

U.S. WEST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	19.0	19.4	0.4	16.9	16.6	0.3
Repeaters (%)	81.0	80.6	-0.4	83.1	83.4	-0.3

U.S. East

U.S. EAST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Jan. 2020P	YTD Jan. 2019P	% change YTD
1st timers (%)	41.5	41.6	0.1	35.3	34.7	0.7
Repeaters (%)	58.5	58.4	-0.1	64.7	65.3	-0.7

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,362.17	5.0%	131.79	119.29	10.5%

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

U.S. West

U.S. WEST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	769.04	814.22	5.9%	72.56	65.23	11.2%

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

U.S. East

U.S. EAST MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	528.76	547.95	3.6%	59.23	54.06	9.6%

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