



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.

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 the 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 the promotion of the *Kuleana* messages designed to increase visitors' safety and shape their behavior while on-island.

Year-to-date July 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (1,160,023) vs. MCI (90,398)
Average Length of Stay:	10.03 days
First Time Visitors:	24.4%
Repeat Visitors:	75.6%

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD July 2020P	YTD July 2019	% change YTD
Visitor Expenditures* (\$ Millions)	11,118.3	11,636.2	4.7%	NA	NA	NA	7,026.5	NA
Visitor Days	59,030,584	61,786,807	4.7%	NA	NA	14,758,323	37,548,277	-54.1%
Arrivals	6,377,352	6,871,839	7.8%	NA	NA	1,472,076	4,150,848	-57.7%
Average Daily Census	161,728	169,279	4.7%	NA	NA	69,288	177,115	-54.4%
Per Person Per Day Spending* (\$)	188.3	188.3	0.0%	NA	NA	NA	187.1	NA
Per Person Per Trip Spending* (\$)	1,743.4	1,693.3	-2.9%	NA	NA	NA	1,692.8	NA
Length of Stay (days)	9.26	8.99	-2.9%	NA	NA	10.03	9.05	10.8%

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

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

U.S. West

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD July 2020P	YTD July 2019	% change YTD
U.S. WEST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	6,588.4	6,952.0	5.5%	NA	NA	NA	4,106.5	NA
Visitor Days	37,477,016	39,752,689	6.1%	NA	NA	8,952,187	23,629,088	-62.1%
Arrivals	4,203,894	4,595,319	9.3%	NA	NA	940,780	2,720,989	-65.4%
Average Daily Census	102,677	108,911	6.1%	NA	NA	42,029	111,458	-62.3%
Per Person Per Day Spending* (\$)	175.8	174.9	-0.5%	NA	NA	NA	173.8	NA
Per Person Per Trip Spending* (\$)	1,567.2	1,512.8	-3.5%	NA	NA	NA	1,509.2	NA
Length of Stay (days)	8.91	8.65	-3.0%	NA	NA	9.52	8.68	9.6%

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

U.S. East

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD July 2020P	YTD July 2019	% change YTD
U.S. EAST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	4,529.9	4,684.2	3.4%	NA	NA	NA	2,919.9	NA
Visitor Days	21,553,568	22,034,119	2.2%	NA	NA	5,806,136	13,919,189	-58.3%
Arrivals	2,173,458	2,276,520	4.7%	NA	NA	531,296	1,429,858	-62.8%
Average Daily Census	59,051	60,367	2.2%	NA	NA	27,259	65,657	-58.5%
Per Person Per Day Spending* (\$)	210.2	212.6	1.2%	NA	NA	NA	209.8	NA
Per Person Per Trip Spending* (\$)	2,084.2	2,057.6	-1.3%	NA	NA	NA	2,042.1	NA
Length of Stay (days)	9.92	9.68	-2.4%	NA	NA	10.93	9.73	12.3%

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

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Market Summary

Due to the COVID-19 pandemic, all passengers arriving from out-of-state during July were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. The U.S. Centers for Disease Control and Prevention (CDC) also continued to enforce its “No Sail Order” on all cruise ships.

In July 2020, 12,890 visitors (462,676 in July 2019) arrived from U.S. West and 7,516 visitors (243,498 in July 2019) came from the U.S. East. Visitor spending data were not available.

U.S. West

- Through the first seven months of 2020, arrivals decreased 65.4 percent to 940,780 visitors. Visitor days dropped 62.1 percent. The average daily census showed 42,029 visitors per day, down 62.3 percent compared to the first seven months of 2019.
- Scheduled air seats for the first seven months of 2020 fell 51.7 percent compared to a year ago, due to reduced service from Denver (-61.3%), Las Vegas (-55.7%), Long Beach (-59.0%), Los Angeles (-55.4%), Phoenix (-59.1%), Portland (-55.2%), San Diego (-60.6%), San Francisco (-51.7%) and Seattle (-43.5%).
- In 2019, the U.S. West market reported a 5.5 percent gain in visitor spending to \$6.95 billion. Visitor arrivals (+9.3% to 4,595,319 visitors) and visitor days (+6.1%) increased but daily visitor spending was down slightly (-0.5% to \$175 per person) compared to 2018. The average daily census showed 108,911 visitors per day in 2019, an increase of 6.1 percent compared to 2018.
- In 2019, scheduled air seats from U.S. West grew 5.5 percent compared to 2018.

U.S. East

- Through the first seven months of 2020, arrivals declined 58.5 percent to 27,259 visitors. Visitor days fell 58.3 percent. The average daily census showed 27,259 visitors per day, a decrease of 58.5 percent compared to year-to-date 2019.
- Scheduled air seats declined 51.5 percent for the first seven months of 2020 as a result of reduced service from Atlanta (-56.9%), Chicago (-44.7%), Dallas (-46.8%), Houston (-57.4%), Minneapolis (-59.1%), Newark (-58.5%), New York JFK (-58.1%) and Washington D.C. (-72.9%).
- In 2019, spending by U.S. East visitors rose 3.4 percent to \$4.68 billion. Visitor arrivals rose(+4.7% to 2,276,520 visitors), visitor days increased (+2.2%) and daily visitor spending was higher (+1.2% to \$213 per person) compared to 2018. The average daily census showed 60,367 visitors per day in 2019, a 2.2 percent growth compared to 2018.
- In 2019, scheduled air seats from U.S. East rose 7.6 percent compared to 2018.

Market Conditions

- According to the Congressional Budget Office's economic projections, real GDP will contract by 5.6 percent in 2020.
- Many of the monthly U.S. economic data for June improved, with some exceptions, including personal income. However, the resurgence of COVID-19 cases across most U.S. states, combined with the effects of consumer pessimism, is contributing to increased economic uncertainty.
- The Conference Board Consumer Confidence Index decreased in July, after increasing in June. The Index now stands at 92.6 (1985=100), down from 98.3 in June. The Expectations Index decreased from 106.1 in May to 91.5 in June based on consumers' short-term outlook for income, business, and labor market conditions.
- U.S. based wholesalers are focusing on future sales (fall and beyond) and education. Most wholesalers are working on recovery plans that are currently more in the inspirational phase -- dream today/book tomorrow.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for August-October 2020 will decrease by 36.1 percent as compared with the same time period of 2019. The projection is based on flights appearing in Diio Mi airline schedules as of July 28, 2020. Due to the COVID-19 outbreak, the decrease in scheduled air seats is expected to occur in all major market areas including U.S. West (-31.3%) and U.S. East (-48.3%). The situation is being monitored daily and the forecast adjusted accordingly.
- All U.S. domestic carriers have extended grounding of the Boeing MAX through September 2020 at the earliest.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
O'ahu	3,043,894	3,326,507	9.3%	726,196	2,011,549	-63.9%
Maui County	2,315,314	2,488,629	7.5%	493,973	1,486,725	-66.8%
Maui	2,277,080	2,449,124	7.6%	483,901	1,463,615	-66.9%
Moloka'i	41,167	42,603	3.5%	10,058	26,470	-62.0%
Lāna'i	55,484	59,810	7.8%	11,740	35,645	-67.1%
Kaua'i	1,134,420	1,135,672	0.1%	236,170	688,692	-65.7%
Island of Hawai'i	1,183,715	1,251,171	5.7%	288,387	761,053	-62.1%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
O'ahu	1,795,039	2,005,506	11.7%	425,223	1,184,713	-64.1%
Maui County	1,501,888	1,641,441	9.3%	305,527	955,871	-68.0%
Maui	1,477,805	1,616,213	9.4%	299,049	941,085	-68.2%
Moloka'i	24,176	25,823	6.8%	5,983	15,665	-61.8%
Lāna'i	28,258	31,672	12.1%	6,244	18,322	-65.9%
Kaua'i	719,930	730,725	1.5%	144,591	433,947	-66.7%
Island of Hawai'i	729,244	786,520	7.9%	178,714	473,197	-62.2%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
O'ahu	1,248,855	1,321,001	5.8%	300,973	826,836	-63.6%
Maui County	813,426	847,188	4.2%	188,446	530,854	-64.5%
Maui	799,275	832,911	4.2%	184,852	522,530	-64.6%
Moloka'i	16,991	16,780	-1.2%	4,075	10,805	-62.3%
Lāna'i	27,226	28,138	3.3%	5,496	17,323	-68.3%
Kaua'i	414,489	404,948	-2.3%	91,580	254,745	-64.1%
Island of Hawai'i	454,472	464,651	2.2%	109,673	287,856	-61.9%

Airlift

	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	2,022,576	253,873	886,662	2,235,694	5,398,805	1,980,931	2,196,965	2,235,504	2,150,895	8,564,295	2.1	-88.4	-60.3	3.9	-37.0
Anchorage	29,256			21,465	50,721	29,764	15,741	14,628	27,685	87,818	-1.7			-22.5	-42.2
Bellingham						10,494	954			11,448					
Denver	80,667	507	38,655	100,607	220,436	79,820	97,006	98,072	102,804	377,702	1.1	-99.5	-60.6	-2.1	-41.6
Las Vegas	69,576		21,128	68,788	159,492	64,964	68,388	66,998	71,112	271,462	7.1		-68.5	-3.3	-41.2
Long Beach	16,443		5,481	17,388	39,312	17,010	17,199	17,388	17,388	68,985	-3.3		-68.5	0.0	-43.0
Los Angeles	556,146	99,818	291,178	632,422	1,579,564	604,098	705,462	726,420	628,714	2,664,694	-7.9	-85.9	-59.9	0.6	-40.7
Oakland	153,858	32,375	66,283	172,436	424,952	93,691	158,972	159,449	159,671	571,783	64.2	-79.6	-58.4	8.0	-25.7
Phoenix	102,399		40,402	104,863	247,664	115,694	105,113	120,802	104,074	445,683	-11.5		-66.6	0.8	-44.4
Portland	110,849		33,006	98,534	242,389	119,435	110,374	79,532	99,994	409,335	-7.2		-58.5	-1.5	-40.8
Sacramento	71,883	700	31,290	66,976	170,849	46,044	55,310	57,040	66,661	225,055	56.1	-98.7	-45.1	0.5	-24.1
Salt Lake City	41,020		2,189	25,662	68,871	39,816	17,998	17,168	24,069	99,051	3.0		-87.3	6.6	-30.5
San Diego	79,758		54,346	111,194	245,298	85,914	89,879	94,264	90,556	360,613	-7.2		-42.3	22.8	-32.0
San Francisco	332,865	55,630	159,509	353,634	901,638	335,296	385,376	403,951	379,986	1,504,609	-0.7	-85.6	-60.5	-6.9	-40.1
San Jose	114,667	525	36,385	163,935	315,512	74,158	103,154	115,532	112,798	405,642	54.6	-99.5	-68.5	45.3	-22.2
Seattle	263,189	64,318	106,810	297,790	732,107	264,733	266,039	264,260	265,383	1,060,415	-0.6	-75.8	-59.6	12.2	-31.0
US EAST	330,695	8,458	79,638	257,968	676,759	298,648	297,809	313,399	272,639	1,182,495	10.7	-97.2	-74.6	-5.4	-42.8
Atlanta	24,542			19,924	44,466	26,954	22,386	22,112	21,894	93,346	-8.9			-9.0	-52.4
Boston	16,958		5,838	18,070	40,866		18,904	21,128	18,348	58,380			-72.4	-1.5	-30.0
Chicago	74,438	1,284	16,253	55,207	147,182	67,218	51,550	53,872	55,094	227,734	10.7	-97.5	-69.8	0.2	-35.4
Dallas	109,434	6,318	33,375	70,497	219,624	95,004	96,096	99,099	83,274	373,473	15.2	-93.4	-66.3	-15.3	-41.2
Detroit	1,758			2,260	4,018		492	10,332	2,344	13,168				-3.6	-69.5
Houston	32,032	856	9,870	33,488	76,246	32,760	33,124	33,488	33,488	132,860	-2.2	-97.4	-70.5	0.0	-42.6
Minneapolis	18,459			2,938	21,397	21,682	17,021	12,054	3,223	53,980	-14.9			-8.8	-60.4
New York JFK	24,892		8,062	27,836	60,790	25,512	25,298	25,576	27,544	103,930	-2.4		-68.5	1.1	-41.5
Newark	21,120		5,520	22,080	48,720	21,600	21,840	22,080	22,080	87,600	-2.2		-75.0	0.0	-44.4
Washington D.C.	7,062		720	5,668	13,450	7,918	11,098	13,658	5,350	38,024	-10.8		-94.7	5.9	-64.6

Source: Diio Mii airline schedules. Updated July 29, 2020.

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P1/	YTD July 2019	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	143,078	5.0%	32,199	97,935	-67.1%
True Independent (Net)	5,233,615	5,674,869	8.4%	1,268,167	3,406,406	-62.8%
Leisure vs business						
Pleasure (Net)	5,277,345	5,720,309	8.4%	1,160,023	3,457,282	-66.4%
MCI (Net)	293,911	293,659	-0.1%	90,398	195,864	-53.8%
Convention/Conf.	184,569	171,970	-6.8%	59,241	111,713	-47.0%
Corp. Meetings	67,184	72,478	7.9%	18,963	47,066	-59.7%
Incentive	52,022	59,031	13.5%	15,056	43,681	-65.5%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P1/	YTD July 2019	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	67,037	6.5%	13,957	43,956	-68.2%
True Independent (Net)	3,493,923	3,836,896	9.8%	825,478	2,260,370	-63.5%
Leisure vs business						
Pleasure (Net)	3,524,847	3,885,753	10.2%	751,857	2,303,334	-67.4%
MCI (Net)	156,181	154,692	-1.0%	45,734	98,721	-53.7%
Convention/Conf.	96,954	91,100	-6.0%	29,133	56,414	-48.4%
Corp. Meetings	39,528	42,499	7.5%	10,445	26,803	-61.0%
Incentive	24,371	25,831	6.0%	7,485	18,526	-59.6%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P1/	YTD July 2019	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	76,041	3.6%	18,242	53,979	-66.2%
True Independent (Net)	1,739,692	1,837,972	5.6%	442,689	1,146,036	-61.4%
Leisure vs business						
Pleasure (Net)	1,752,498	1,834,556	4.7%	408,166	1,153,948	-64.6%
MCI (Net)	137,730	138,967	0.9%	44,663	97,142	-54.0%
Convention/Conf.	87,615	80,869	-7.7%	30,108	55,299	-45.6%
Corp. Meetings	27,655	29,980	8.4%	8,518	20,262	-58.0%
Incentive	27,651	33,199	20.1%	7,571	25,156	-69.9%

1/ Note: Beginning June 2020, certain categories reflect only domestic data (italicized) as international data were not available.

First Timers vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P 1/	YTD July 2019	% change YTD
1st timers (%)	26.7	26.7	0.0	24.4	26.9	-2.5
Repeaters (%)	73.3	73.3	0.0	75.6	73.1	2.5

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P 1/	YTD July 2019	% change YTD
1st timers (%)	19.0	19.4	0.4	17.5	19.4	-1.9
Repeaters (%)	81.0	80.6	-0.4	82.5	80.6	1.9

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P 1/	YTD July 2019	% change YTD
1st timers (%)	41.5	41.5	0.0	36.7	41.3	-4.5
Repeaters (%)	58.5	58.5	0.0	63.3	58.7	4.5

1/ Note: Beginning June 2020, certain categories reflect only domestic data (italicized) as international data were not available.

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,358.25	4.7%	NA	820.17	NA

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

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
State tax revenue generated* (\$ Millions)	769.04	811.48	5.5%	NA	479.34	NA

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

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD July 2020P	YTD July 2019	% change YTD
State tax revenue generated* (\$ Millions)	528.76	546.77	3.4%	NA	340.83	NA

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