



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 September 2020 Quick Facts ¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (1,165,740) vs. MCI (90,693)
Average Length of Stay:	10.55 days
First Time Visitors:	24.4%
Repeat Visitors:	75.6%

U.S. Total

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
U.S. TOTAL (by Air)								
Visitor Expenditures* (\$ Millions)	11,118.3	11,636.2	4.7%	NA	NA	NA	8,739.8	NA
Visitor Days	59,030,584	61,786,807	4.7%	NA	NA	15,906,781	46,717,448	-66.0%
Arrivals	6,377,352	6,871,839	7.8%	NA	NA	1,508,289	5,210,250	-71.1%
Average Daily Census	161,728	169,279	4.7%	NA	NA	58,054	171,126	-66.1%
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	1,677.4	NA
Length of Stay (days)	9.26	8.99	-2.9%	NA	NA	10.55	8.97	17.6%

*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 Sep. 2020P	YTD Sep. 2019	% change YTD
U.S. WEST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	6,588.4	6,952.0	5.5%	NA	NA	NA	5,151.9	NA
Visitor Days	37,477,016	39,752,689	6.1%	NA	NA	9,656,016	29,691,370	-67.5%
Arrivals	4,203,894	4,595,319	9.3%	NA	NA	963,552	3,447,548	-72.1%
Average Daily Census	102,677	108,911	6.1%	NA	NA	35,241	108,760	-67.6%
Per Person Per Day Spending* (\$)	175.8	174.9	-0.5%	NA	NA	NA	173.5	NA
Per Person Per Trip Spending* (\$)	1,567.2	1,512.8	-3.5%	NA	NA	NA	1,494.4	NA
Length of Stay (days)	8.91	8.65	-3.0%	NA	NA	10.02	8.61	16.4%

*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 Sep. 2020P	YTD Sep. 2019	% change YTD
U.S. EAST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	4,529.9	4,684.2	3.4%	NA	NA	NA	3,587.9	NA
Visitor Days	21,553,568	22,034,119	2.2%	NA	NA	6,250,766	17,026,078	-63.3%
Arrivals	2,173,458	2,276,520	4.7%	NA	NA	544,736	1,762,702	-69.1%
Average Daily Census	59,051	60,367	2.2%	NA	NA	22,813	62,367	-63.4%
Per Person Per Day Spending* (\$)	210.2	212.6	1.2%	NA	NA	NA	210.7	NA
Per Person Per Trip Spending* (\$)	2,084.2	2,057.6	-1.3%	NA	NA	NA	2,035.5	NA
Length of Stay (days)	9.92	9.68	-2.4%	NA	NA	11.47	9.66	18.8%

*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 September were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. On August 11, a partial interisland quarantine was reinstated for anyone traveling to the counties of Kaua'i, Hawai'i, Maui, and Kalawao (Moloka'i). The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "No Sail Order" on all cruise ships.

In September 2020, 9,994 visitors (305,808 in September 2019) arrived from U.S. West and 6,033 visitors (133,185 in September 2019) came from the U.S. East. Visitor spending data were not available.

U.S. West

- Through the first nine months of 2020, arrivals decreased 72.1 percent to 963,552 visitors. Visitor days dropped 67.5 percent. The average daily census showed 35,241 visitors per day, down 67.6 percent compared to the first nine months of 2019.
- Scheduled air seats for the first nine months of 2020 fell 57.9 percent compared to a year ago, due to reduced service from Denver (-65.9%), Las Vegas (-65.3%), Long Beach (-68.1%), Los Angeles (-60.9%), Phoenix (-68.2%), Portland (-59.2%), San Diego (-63.0%), San Francisco (-56.5%) and Seattle (-48.2%).
- 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 nine months of 2020, arrivals declined 69.1 percent to 544,736 visitors. Visitor days fell 63.3 percent. The average daily census showed 22,813 visitors per day, a decrease of 63.4 percent compared to year-to-date 2019.
- Scheduled air seats declined 59.1 percent for the first nine months of 2020 as a result of reduced service from Atlanta (-65.7%), Chicago (-51.7%), Dallas (-51.3%), Houston (-66.9%), Minneapolis (-63.6%), Newark (-67.8%), New York JFK (-67.4%) and Washington D.C. (-78.4%).
- 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.
- Looking toward year-end, the U.S. economy is once again changing. The churn in the labor market, due primarily to the coronavirus pandemic, continued through September. For the month, 661,000 payroll jobs were added. This gain was below expectations and represented the third consecutive monthly decline after the June re-opening surge of 4.8 million net new jobs. The unemployment rate in September fell to 7.9 percent.
- The Conference Board Consumer Confidence Index increased in September, after declining in August. The Index now stands at 101.8 (1985=100), up from 86.3 in August.
- The Present Situation Index based on consumers' assessment of current business and labor market conditions increased from 85.8 to 98.5. The Expectations Index based on consumers' short-term outlook for income, business, and labor market conditions increased from 86.6 in August to 104.0 this month.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for October-December 2020 will decrease by 35.5 percent as compared with the same time period of 2019. The projection is based on flights appearing in Dii Mi airline schedules. 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 (-34.8%) and U.S. East (-40.6%). The situation is being monitored daily and the forecast adjusted accordingly.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
O'ahu	3,043,894	3,326,507	9.3%	750,651	2,526,331	-70.3%
Maui County	2,315,314	2,488,629	7.5%	498,633	1,884,470	-73.5%
Maui	2,277,080	2,449,124	7.6%	488,402	1,855,369	-73.7%
Moloka'i	41,167	42,603	3.5%	10,222	32,164	-68.2%
Lāna'i	55,484	59,810	7.8%	11,849	45,539	-74.0%
Kaua'i	1,134,420	1,135,672	0.1%	238,474	862,218	-72.3%
Island of Hawai'i	1,183,715	1,251,171	5.7%	294,904	942,704	-68.7%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
O'ahu	1,795,039	2,005,506	11.7%	439,701	1,507,819	-70.8%
Maui County	1,501,888	1,641,441	9.3%	308,838	1,227,029	-74.8%
Maui	1,477,805	1,616,213	9.4%	302,248	1,208,906	-75.0%
Moloka'i	24,176	25,823	6.8%	6,085	19,210	-68.3%
Lāna'i	28,258	31,672	12.1%	6,318	23,193	-72.8%
Kaua'i	719,930	730,725	1.5%	146,252	546,931	-73.3%
Island of Hawai'i	729,244	786,520	7.9%	183,155	583,484	-68.6%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
O'ahu	1,248,855	1,321,001	5.8%	310,950	1,018,513	-69.5%
Maui County	813,426	847,188	4.2%	189,795	657,441	-71.1%
Maui	799,275	832,911	4.2%	186,153	646,463	-71.2%
Moloka'i	16,991	16,780	-1.2%	4,137	12,954	-68.1%
Lāna'i	27,226	28,138	3.3%	5,530	22,347	-75.3%
Kaua'i	414,489	404,948	-2.3%	92,222	315,287	-70.7%
Island of Hawai'i	454,472	464,651	2.2%	111,748	359,220	-68.9%

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	423,959	1,248,557	3,948,965	1,980,931	2,196,965	2,235,504	2,150,895	8,564,295	2.1	-88.4	-81.0	-42.0	-53.9
Anchorage	29,256	0	0	8,904	38,160	29,764	15,741	14,628	27,685	87,818	-1.7	100.0	100.0	-67.8	-56.5
Bellingham	0	0	0	0	0	10,494	954			11,448	100.0	100.0		-100.0	
Denver	80,667	507	12,702	69,904	163,780	79,820	97,006	98,072	102,804	377,702	1.1	-99.5	-87.0	-32.0	-56.6
Las Vegas	69,576	0	0	20,360	89,936	64,964	68,388	66,998	71,112	271,462	7.1	100.0	100.0	-71.4	-66.9
Long Beach	16,443	0	0	3,024	19,467	17,010	17,199	17,388	17,388	68,985	-3.3	100.0	100.0	-82.6	-71.8
Los Angeles	556,146	99,818	140,956	351,874	1,148,794	604,098	705,462	726,420	628,714	2,664,694	-7.9	-85.9	-80.6	-44.0	-56.9
Oakland	153,858	32,375	32,200	90,148	308,581	93,691	158,972	159,449	159,671	571,783	64.2	-79.6	-79.8	-43.5	-46.0
Phoenix	102,399		6,272	72,231	180,902	115,694	105,113	120,802	104,074	445,683	-11.5		-94.8	-30.6	-59.4
Portland	110,849		15,498	33,675	160,022	119,435	110,374	79,532	99,994	409,335	-7.2		-80.5	-66.3	-60.9
Sacramento	71,883	700	11,340	38,822	122,745	46,044	55,310	57,040	66,661	225,055	56.1	-98.7	-80.1	-41.8	-45.5
Salt Lake City	41,020			12,656	53,676	39,816	17,998	17,168	24,069	99,051	3.0			-47.4	-45.8
San Diego	79,758		20,282	58,952	158,992	85,914	89,879	94,264	90,556	360,613	-7.2		-78.5	-34.9	-55.9
San Francisco	332,865	55,630	100,571	207,048	696,114	335,296	385,376	403,951	379,986	1,504,609	-0.7	-85.6	-75.1	-45.5	-53.7
San Jose	114,667	525		85,775	200,967	74,158	103,154	115,532	112,798	405,642	54.6	-99.5		-24.0	-50.5
Seattle	263,189	64,318	84,138	195,184	606,829	264,733	266,039	264,260	265,383	1,060,415	-0.6	-75.8	-68.2	-26.5	-42.8
US EAST	330,695	8,458	33,315	141,653	514,121	298,648	297,809	313,399	272,639	1,182,495	10.7	-97.2	-89.4	-48.0	-56.5
Atlanta	24,542			3,164	27,706	26,954	22,386	22,112	21,894	93,346	-8.9			-85.5	-70.3
Boston	16,958			1,112	18,070	0	18,904	21,128	18,348	58,380	NA			-93.9	-69.0
Chicago	74,438	1,284	7,665	39,638	123,025	67,218	51,550	53,872	55,094	227,734	10.7	-97.5	-85.8	-28.1	-46.0
Dallas	109,434	6,318	25,650	66,579	207,981	95,004	96,096	99,099	83,274	373,473	15.2	-93.4	-74.1	-20.0	-44.3
Detroit	1,758	0	0	0	1,758	0	492	10,332	2,344	13,168	NA	100.0	100.0	100.0	-86.6
Houston	32,032	856	0	15,778	48,666	32,760	33,124	33,488	33,488	132,860	-2.2	-97.4	100.0	-52.9	-63.4
Minneapolis	18,459	0	0	3,164	21,623	21,682	17,021	12,054	3,223	53,980	-14.9	100.0	100.0	-1.8	-59.9
New York JFK	24,892	0	0	1,946	26,838	25,512	25,298	25,576	27,544	103,930	-2.4	100.0	100.0	-92.9	-74.2
Newark	21,120	0	0	6,634	27,754	21,600	21,840	22,080	22,080	87,600	-2.2	100.0	100.0	-70.0	-68.3
Washington D.C.	7,062	0	0	3,638	10,700	7,918	11,098	13,658	5,350	38,024	-10.8	100.0	100.0	-32.0	-71.9

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P1/	YTD Sep. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	143,078	5.0%	32,766	116,155	-71.8%
True Independent (Net)	5,233,615	5,674,869	8.4%	1,301,951	4,265,256	-69.5%
Leisure vs business						
Pleasure (Net)	5,277,345	5,720,309	8.4%	1,165,740	4,348,828	-73.2%
MCI (Net)	293,911	293,659	-0.1%	90,693	228,442	-60.3%
Convention/Conf.	184,569	171,970	-6.8%	59,323	126,621	-53.1%
Corp. Meetings	67,184	72,478	7.9%	19,091	57,460	-66.8%
Incentive	52,022	59,031	13.5%	15,166	52,718	-71.2%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P1/	YTD Sep. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	67,037	6.5%	14,272	52,951	-73.0%
True Independent (Net)	3,493,923	3,836,896	9.8%	847,021	2,854,768	-70.3%
Leisure vs business						
Pleasure (Net)	3,524,847	3,885,753	10.2%	755,520	2,922,545	-74.1%
MCI (Net)	156,181	154,692	-1.0%	45,907	116,048	-60.4%
Convention/Conf.	96,954	91,100	-6.0%	29,192	64,952	-55.1%
Corp. Meetings	39,528	42,499	7.5%	10,510	32,746	-67.9%
Incentive	24,371	25,831	6.0%	7,555	22,220	-66.0%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P1/	YTD Sep. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	76,041	3.6%	18,495	63,204	-70.7%
True Independent (Net)	1,739,692	1,837,972	5.6%	454,930	1,410,488	-67.7%
Leisure vs business						
Pleasure (Net)	1,752,498	1,834,556	4.7%	410,220	1,426,283	-71.2%
MCI (Net)	137,730	138,967	0.9%	44,786	112,394	-60.2%
Convention/Conf.	87,615	80,869	-7.7%	30,131	61,670	-51.1%
Corp. Meetings	27,655	29,980	8.4%	8,582	24,714	-65.3%
Incentive	27,651	33,199	20.1%	7,612	30,498	-75.0%

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 Sep. 2020P1/	YTD Sep. 2019	% change YTD
1st timers (%)	26.7	26.7	0.0	24.4	27.4	-3.0
Repeaters (%)	73.3	73.3	0.0	75.6	72.6	3.0

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P1/	YTD Sep. 2019	% change YTD
1st timers (%)	19.0	19.4	0.4	17.5	19.8	-2.4
Repeaters (%)	81.0	80.6	-0.4	82.5	80.2	2.4

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P1/	YTD Sep. 2019	% change YTD
1st timers (%)	41.5	41.5	0.0	36.7	42.1	-5.5
Repeaters (%)	58.5	58.5	0.0	63.3	57.9	5.5

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 Sep. 2020P	YTD Sep. 2019	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,358.25	4.7%	NA	1,020.16	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 Sep. 2020P	YTD Sep. 2019	% change YTD
State tax revenue generated* (\$ Millions)	769.04	811.48	5.5%	NA	601.35	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 Sep. 2020P	YTD Sep. 2019	% change YTD
State tax revenue generated* (\$ Millions)	528.76	546.77	3.4%	NA	418.80	NA

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