



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 strong, although value continues to be a deciding factor. 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 2019, new activities occurring in the market include: 1) Phase three of the New York City market activation involving out-of-home, digital, social, travel trade and influencer events; 2) evolution of the 'Hawai'i Rooted' campaign to the responsible tourism program which consists of videos focused on natural resources and the Hawaiian culture; and 3) development of an online training program for meeting planners.

Year-to-Date August 2019 Quick Facts¹

Visitor Expenditures:	\$7.99 billion
Primary Purpose of Stay:	Pleasure (3,983,790) vs. MCI (211,261)
Average Length of Stay:	8.99 days
First Time Visitors:	27.2%
Repeat Visitors:	72.8%

U.S. Total

	2018 ²	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
U.S. TOTAL (by Air)								
Visitor Expenditures* (\$ Millions)	11,148.3	10,305.7	8.2%	11,393.3	2.2%	7,990.8	7,700.4	3.8%
Visitor Days	59,053,799	54,998,673	7.4%	60,525,018	2.5%	42,848,030	40,744,593	5.2%
Arrivals	6,368,852	5,842,567	9.0%	6,747,782	5.9%	4,767,267	4,372,597	9.0%
Per Person Per Day Spending* (\$)	188.8	187.4	0.7%	188.2	-0.3%	186.5	189.0	-1.3%
Per Person Per Trip Spending* (\$)	1,750.4	1,763.9	-0.8%	1,688.4	-3.5%	1,676.2	1,761.1	-4.8%
Length of Stay (days)	9.27	9.41	-1.5%	8.97	-3.3%	8.99	9.32	-3.5%

¹ 2019 and 2018 data are preliminary. 2017 visitor data are the final numbers and reflect data from updated reports from airlines.

²**Technical Notes:** The HTA received revised hotel room and package rates for the first quarter of 2018 which warranted revisions to the published preliminary statistics (visitor expenditures, per person per day spending and per person per trip spending) for first quarter 2018. Updated data tables are available on the HTA website. 2018 visitor statistics will be finalized for the 2018 Annual Visitor Research Report.

U.S. West

			% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
U.S. WEST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	6,609.7	6,080.7	8.7%	6,831.5	3.4%	4,697.8	4,486.6	4.7%
Visitor Days	37,606,328	34,854,624	7.9%	38,902,121	3.4%	27,172,508	25,489,963	6.6%
Arrivals	4,212,058	3,843,780	9.6%	4,509,772	7.1%	3,151,776	2,845,510	10.8%
Per Person Per Day Spending* (\$)	175.8	174.5	0.7%	175.6	-0.1%	172.9	176.0	-1.8%
Per Person Per Trip Spending* (\$)	1,569.2	1,582.0	-0.8%	1,514.8	-3.5%	1,490.5	1,576.7	-5.5%
Length of Stay (days)	8.93	9.07	-1.5%	8.63	-3.4%	8.62	8.96	-3.8%

U.S. East

			% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
U.S. EAST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	4,538.6	4,225.0	7.4%	4,561.8	0.5%	3,293.0	3,213.8	2.5%
Visitor Days	21,447,470	20,144,049	6.5%	21,622,897	0.8%	15,675,522	15,254,630	2.8%
Arrivals	2,156,793	1,998,788	7.9%	2,238,010	3.8%	1,615,491	1,527,087	5.8%
Per Person Per Day Spending* (\$)	211.6	209.7	0.9%	211.0	-0.3%	210.1	210.7	-0.3%
Per Person Per Trip Spending* (\$)	2,104.3	2,113.8	-0.4%	2,038.3	-3.1%	2,038.4	2,104.5	-3.1%
Length of Stay (days)	9.94	10.08	-1.3%	9.66	-2.8%	9.70	9.99	-2.9%

*Excludes supplemental business spending

Contact Information

Hawai'i Tourism Authority: Laci Goshi, Market Manager
Tel: (808) 973-2268
laci@gohta.net

Hawai'i Tourism United States: Jay Talwar, Senior Vice President & Chief Marketing Officer
Hawai'i Tourism United States
2270 Kalākaua Avenue, Suite 801
Honolulu, Hawai'i 96815
Telephone: (808) 924-0220
italwar@hvcb.org

Market Summary

U.S. West

- In 2018, arrivals rose 9.6 percent to 4,212,058 visitors, supported by expanded air service to the Neighbor Islands. Combined with higher daily spending (+0.7% to \$176 per person), U.S. West visitor expenditures grew 8.7 percent over 2017 to \$6.61 billion. Through August 2019, growth in arrivals (+10.8% to 3,151,776 visitors) contributed to a 4.7 percent increase in visitor expenditures to \$4.70 billion. Daily spending (-1.8% to \$173 per person) was lower compared to the first eight months of 2018.
- Airlift: In 2018, the number of scheduled seats from U.S. West increased 10.7 percent compared to the previous year. Through August 2019, scheduled air seats from the U.S. West market rose 4.8 percent compared to the same period last year. Increased service from Long Beach (+164.1%), Oakland (+49.7%), Sacramento (+37.1%), Denver (+14.8%), Portland (+10.2%), Anchorage (+9.2%), San Diego (+8.6%) and Seattle (+7.9%) offset fewer air seats from Salt Lake City (-8.8%), Los Angeles (-4.1%) and Phoenix (-1.0%).

U.S. East

- In 2018, the U.S. East market reported a gain in visitor spending (+7.4% to \$4.54 billion), boosted by increases in visitor arrivals (+7.9% to 2,156,793) and higher average daily spending (+0.9% to \$212 per person). Through August 2019, growth in arrivals (+5.8% to 1,615,491 visitors) contributed to a 2.5 percent increase in visitor expenditures to \$3.29 billion. Daily visitor spending of \$210 per person (-0.3%) was similar to year-to-date 2018.
- Airlift: In 2018, scheduled seats were up 8.9 percent from 2017. Through August 2019, total scheduled air seats from the U.S. East market rose 5.2 percent compared to the same period last year. The addition of five flights per week service from Boston (+33,638 seats, started April 2019), seasonal service from Detroit (+10,332), and growth in air seat capacity from Chicago (+5.3%) offset fewer seats from Minneapolis (-3.2%), Dallas (-2.9%) and New York JFK (-1.4%).

Market Conditions

- The U.S. economic outlook is healthy according to key economic indicators. The gross domestic product is expected to remain between two and three percent.
- Inflation-adjusted gross domestic product (real GDP), will remain positive but is expected to decelerate through the end of 2020. Following an increase of 3.2 percent at a seasonally adjusted annual rate in the fourth quarter of 2018, the median forecast is for real GDP growth to slow to a +2.1 percent rate by Q4 2019 and +1.9 percent by Q4 2020.
- Conference Board Consumer Confidence Index declined marginally in August, following July's rebound. The Index now stands at 135.1 (1985=100), down from 135.8 in July.
- Unemployment is forecast to continue at the current rate of about 3.9 percent.
- This month's Travel Trends Index (TTI) finds that travel to and within the U.S. grew 3.2 percent in July 2019 compared to July 2018—a slight rebound from June's nine-month low.
- The U.S. domestic carriers have extended their grounding of the MAX through 2019, however, they continue to operate a full schedule.

- Effective Nov. 6, Alaska Airlines will discontinue seasonal flights from Bellingham to Maui and Kona and will add a third daily flight from Seattle to Maui. This winter season, the airline will average 32 daily flights to Hawai'i from the West Coast, more than any other carrier.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
O'ahu	3,037,409	2,790,893	8.8%	2,314,443	2,068,762	11.9%
Maui County	2,313,435	2,141,741	8.0%	1,712,572	1,603,136	6.8%
Maui	2,275,262	2,109,491	7.9%	1,685,431	1,576,590	6.9%
Moloka'i	40,988	37,692	8.7%	29,473	27,635	6.7%
Lāna'i	54,250	44,367	22.3%	41,868	37,768	10.9%
Kaua'i	1,133,321	1,044,604	8.5%	786,883	785,019	0.2%
Island of Hawai'i	1,180,926	1,177,744	0.3%	871,852	834,996	4.4%

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
O'ahu	1,802,994	1,639,172	10.0%	1,384,496	1,203,695	15.0%
Maui County	1,502,677	1,382,955	8.7%	1,109,715	1,022,032	8.6%
Maui	1,478,529	1,361,349	8.6%	1,093,055	1,005,549	8.7%
Moloka'i	24,393	22,561	8.1%	17,675	15,381	14.9%
Lāna'i	27,912	24,498	13.9%	21,347	18,506	15.3%
Kaua'i	721,015	658,645	9.5%	498,036	488,801	1.9%
Island of Hawai'i	729,071	709,639	2.7%	539,208	502,257	7.4%

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
O'ahu	1,234,414	1,151,721	7.2%	929,948	865,066	7.5%
Maui County	810,758	758,786	6.8%	602,857	581,104	3.7%
Maui	796,733	748,142	6.5%	592,376	571,042	3.7%
Moloka'i	16,595	15,132	9.7%	11,799	12,254	-3.7%
Lāna'i	26,338	19,869	32.6%	20,522	19,262	6.5%
Kaua'i	412,306	385,959	6.8%	288,846	296,219	-2.5%
Island of Hawai'i	451,855	468,105	-3.5%	332,645	332,739	0.0%

Airlift

	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	1,980,931	2,196,965	2,235,453	2,141,091	8,554,440	1,961,773	2,071,414	2,098,475	1,989,340	8,121,002	1.0	6.1	6.5	7.6	5.3
Anchorage	29,764	15,741	14,628	27,666	87,799	26,235	14,628	14,628	23,850	79,341	13.5	7.6	0.0	16.0	10.7
Bellingham	10,494	954		0	11,448	10,176	0		7,632	17,808	3.1	NA		100.0	-35.7
Denver	79,820	97,006	98,072	100,269	375,167	78,390	79,261	80,132	80,132	317,915	1.8	22.4	22.4	25.1	18.0
Las Vegas	64,964	68,388	66,998	71,112	271,462	65,304	65,052	65,886	66,164	262,406	-0.5	5.1	1.7	7.5	3.5
Long Beach	17,010	17,199	17,388	17,388	68,985	0	5,670	17,388	17,388	40,446	NA	203.3	0.0	0.0	70.6
Los Angeles	604,098	705,462	726,385	627,574	2,663,519	647,820	730,161	746,372	622,183	2,746,536	-6.7	-3.4	-2.7	0.9	-3.0
Oakland	93,691	158,972	159,449	159,230	571,342	80,991	91,698	99,660	97,114	369,463	15.7	73.4	60.0	64.0	54.6
Phoenix	115,694	105,113	120,802	106,426	448,035	118,962	108,187	118,016	104,498	449,663	-2.7	-2.8	2.4	1.8	-0.4
Portland	119,435	110,374	79,551	101,786	411,146	106,887	100,443	79,801	102,648	389,779	11.7	9.9	-0.3	-0.8	5.5
Sacramento	46,044	55,310	57,040	57,263	215,657	37,620	38,038	38,456	39,270	153,384	22.4	45.4	48.3	45.8	40.6
Salt Lake City	39,816	17,998	17,114	24,116	99,044	39,433	23,678	20,327	27,812	111,250	1.0	-24.0	-15.8	-13.3	-11.0
San Diego	85,914	89,879	94,264	90,556	360,613	66,360	86,828	97,903	90,664	341,755	29.5	3.5	-3.7	-0.1	5.5
San Francisco	335,296	385,376	403,951	380,084	1,504,707	348,943	382,572	377,092	361,713	1,470,320	-3.9	0.7	7.1	5.1	2.3
San Jose	74,158	103,154	115,532	112,247	405,091	83,191	98,420	97,028	89,692	368,331	-10.9	4.8	19.1	25.1	10.0
Seattle	264,733	266,039	264,279	265,374	1,060,425	251,461	246,778	245,786	258,580	1,002,605	5.3	7.8	7.5	2.6	5.8
US EAST	298,648	297,809	313,399	271,684	1,181,540	295,707	286,114	281,065	235,745	1,098,631	1.0	4.1	11.5	15.2	7.5
Atlanta	26,954	22,386	22,112	21,941	93,393	26,041	22,971	22,632	25,601	97,245	3.5	-2.5	-2.3	-14.3	-4.0
Boston		18,904	21,128	18,348	58,380		0	0	0	0		NA	NA	NA	NA
Chicago	67,218	51,550	53,872	55,094	227,734	56,784	56,784	52,052	45,162	210,782	18.4	-9.2	3.5	22.0	8.0
Dallas	95,004	96,096	99,099	82,272	372,471	99,264	99,180	99,099	69,615	367,158	-4.3	-3.1	0.0	18.2	1.4
Detroit		492	10,332	2,344	13,168		0	0	0	0		NA	NA	NA	NA
Houston	32,760	33,124	33,488	33,488	132,860	32,760	33,124	33,488	33,488	132,860	0.0	0.0	0.0	0.0	0.0
Minneapolis	21,682	17,021	12,054	3,223	53,980	24,236	15,559	12,656	6,135	58,586	-10.5	9.4	-4.8	-47.5	-7.9
New York JFK	25,512	25,298	25,576	27,544	103,930	26,496	25,298	25,576	28,528	105,898	-3.7	0.0	0.0	-3.4	-1.9
Newark	21,600	21,840	22,080	22,080	87,600	21,780	21,856	22,080	22,080	87,796	-0.8	-0.1	0.0	0.0	-0.2
Washington D.C.	7,918	11,098	13,658	5,350	38,024	8,346	11,342	13,482	5,136	38,306	-5.1	-2.2	1.3	4.2	-0.7

Source: Diio Mii airline schedules. Updated August 26, 2019.

Group vs. FIT; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
Group vs FIT						
Group tour	136,540	143,303	-4.7%	108,173	100,839	7.3%
True Independent	5,225,861	4,715,662	10.8%	3,903,725	3,561,147	9.6%
Leisure vs business						
Pleasure (Net)	5,267,011	4,817,914	9.3%	3,983,790	3,640,083	9.4%
MCI (Net)	293,827	288,720	1.8%	211,261	204,791	3.2%
Convention/Conf.	184,435	173,210	6.5%	117,363	122,473	-4.2%
Corp. Meetings	67,419	70,067	-3.8%	52,891	48,804	8.4%
Incentive	51,869	56,321	-7.9%	48,736	41,303	18.0%

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
Group vs FIT						
Group tour	63,220	63,032	0.3%	49,273	45,447	8.4%
True Independent	3,499,813	3,145,441	11.3%	2,609,760	2,350,829	11.0%
Leisure vs business						
Pleasure (Net)	3,529,438	3,219,410	9.6%	2,674,387	2,397,883	11.5%
MCI (Net)	156,379	147,969	5.7%	106,910	105,133	1.7%
Convention/Conf.	97,000	88,950	9.0%	59,758	61,629	-3.0%
Corp. Meetings	39,604	39,365	0.6%	30,167	28,056	7.5%
Incentive	24,463	24,694	-0.9%	20,553	18,958	8.4%

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
Group vs FIT						
Group tour	73,320	80,271	-8.7%	58,900	55,392	6.3%
True Independent	1,726,048	1,570,221	9.9%	1,293,966	1,210,317	6.9%
Leisure vs business						
Pleasure (Net)	1,737,573	1,598,504	8.7%	1,309,403	1,242,201	5.4%
MCI (Net)	137,448	140,751	-2.3%	104,351	99,658	4.7%
Convention/Conf.	87,434	84,259	3.8%	57,605	60,844	-5.3%
Corp. Meetings	27,816	30,703	-9.4%	22,724	20,748	9.5%
Incentive	27,405	31,627	-13.3%	28,184	22,345	26.1%

First Timers vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
1st timers (%)	26.6	26.9	-0.2	27.2	27.2	0.0
Repeaters (%)	73.4	73.1	0.2	72.8	72.8	0.0

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
1st timers (%)	19.0	19.1	0.0	19.7	19.2	0.5
Repeaters (%)	81.0	80.9	0.0	80.3	80.8	-0.5

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018	% change YTD
1st timers (%)	41.5	41.9	-0.3	41.8	41.9	-0.1
Repeaters (%)	58.5	58.1	0.3	58.2	58.1	0.1

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
State tax revenue generated* (\$ Millions)	1,301.29	1,202.94	8.2%	932.73	898.83	3.8%

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

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
State tax revenue generated* (\$ Millions)	771.52	709.78	8.7%	548.36	523.70	4.7%

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

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Aug. 2019	YTD Aug. 2018 ²	% change YTD
State tax revenue generated* (\$ Millions)	529.77	493.17	7.4%	384.37	375.13	2.5%

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