



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 'Tourism Kuleana' which consists of six videos focused on natural resources and the Hawaiian culture; and 3) development of an online training program for meeting planners.

Year-to-Date February 2019 Quick Facts¹

Visitor Expenditures:	\$1.89 million
Primary Purpose of Stay:	Pleasure (789,655) vs. MCI (77,347)
Average Length of Stay:	9.84 days
First Time Visitors:	23.7%
Repeat Visitors:	76.3%

U.S. Total

	2018 ²	2017	% Change 2018 vs 2017	2019 Forecast (Feb. 2019)	% Change 2018 vs 2019 Forecast	YTD Feb. 2019	YTD Feb. 2018 ²	% change YTD
U.S. TOTAL (by Air)								
Visitor Expenditures* (\$ Millions)	11,202.7	10,305.7	8.7%	11,881.1	6.1%	1,893.6	1,918.3	-1.3%
Visitor Days	59,053,799	54,998,673	7.4%	60,526,852	2.5%	9,726,933	9,653,740	0.8%
Arrivals	6,368,852	5,842,567	9.0%	6,469,103	1.6%	988,008	952,570	3.7%
Per Person Per Day Spending* (\$)	189.7	187.4	1.2%	196.3	3.5%	194.7	198.7	-2.0%
Per Person Per Trip Spending* (\$)	1,759.0	1,763.9	-0.3%	1,836.6	4.4%	1,916.6	2,013.8	-4.8%
Length of Stay (days)	9.27	9.41	-1.5%	9.36	0.9%	9.84	10.13	-2.9%

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. East

			% Change 2018 vs 2017	2019 Forecast (Feb. 2019)	% Change 2018 vs 2019 Forecast	YTD Feb. 2019	YTD Feb. 2018 ²	% change YTD
U.S. WEST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	6,636.8	6,080.7	9.1%	7,045.9	6.2%	1,061.2	1,070.2	-0.8%
Visitor Days	37,606,328	34,854,624	7.9%	38,552,873	2.5%	5,835,249	5,742,971	1.6%
Arrivals	4,212,058	3,843,780	9.6%	4,275,672	1.5%	631,064	598,173	5.5%
Per Person Per Day Spending* (\$)	176.5	174.5	1.2%	182.8	3.6%	181.9	186.3	-2.4%
Per Person Per Trip Spending* (\$)	1,575.7	1,582.0	-0.4%	1,647.9	4.6%	1,681.5	1,789.1	-6.0%
Length of Stay (days)	8.93	9.07	-1.5%	9.02	1.0%	9.25	9.60	-3.7%

U.S. East

			% Change 2018 vs 2017	2019 Forecast (Feb. 2019)	% Change 2018 vs 2019 Forecast	YTD Feb. 2019	YTD Feb. 2018 ²	% change YTD
U.S. EAST MMA (by Air)	2018 ²	2017						
Visitor Expenditures* (\$ Millions)	4,565.9	4,225.0	8.1%	4,835.3	5.9%	832.5	848.1	-1.8%
Visitor Days	21,447,470	20,144,049	6.5%	21,973,979	2.5%	3,891,684	3,910,768	-0.5%
Arrivals	2,156,793	1,998,788	7.9%	2,193,431	1.7%	356,943	354,397	0.7%
Per Person Per Day Spending* (\$)	212.9	209.7	1.5%	220.0	3.4%	213.9	216.9	-1.4%
Per Person Per Trip Spending* (\$)	2,117.0	2,113.8	0.2%	2,204.4	4.1%	2,332.2	2,393.1	-2.5%
Length of Stay (days)	9.94	10.08	-1.3%	10.02	0.7%	10.90	11.03	-1.2%

*Excludes supplemental business spending

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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 (+0.9% to \$176 per person), U.S. West visitor expenditures gained 8.9 percent over 2017 to \$6.62 billion. In the first two months of 2019, visitor arrivals increased 5.5 percent to 631,064 visitors. However, daily spending (-2.4% to \$182 per person) was lower compared to year-to-date February 2018 and led to a slight drop in U.S. West visitor expenditures (-0.8% to \$1.06 billion)
- Airlift: In 2018, the number of scheduled seats from U.S. West increased 10.7 percent compared to the previous year. In the first two months of 2019, scheduled air seats from the U.S. West market rose slightly (+1.0%) compared to the same period last year. The addition of daily service from Long Beach (+11,151 seats, started June 2018), and increased service from San Diego (+31.9%), Sacramento (+22.6%), Portland (+16.8%), Anchorage (+13.9%) and Oakland (+9.2%) offset fewer air seats from San Jose (-10.3%), Los Angeles (-6.1%), San Francisco (-6.0%) and Phoenix (-2.3%).

U.S. East

- In 2018, the U.S. East market reported a gain in visitor spending (+7.8% to \$4.55 billion), boosted by increases in visitor arrivals (+7.9% to 2,156,793) and average daily spending (+1.2% to \$213 per person). In the first two months of 2019, arrivals rose slightly (+0.7%) to 356,943 visitors. However, a shorter length of stay (-1.2% to 10.90 days) and lower daily spending (-1.4% to \$214 per person) resulted in a 1.8 percent decrease in visitor expenditures to \$832.5 million.
- Airlift: In 2018, scheduled seats were up 8.9 percent from 2017. In the first two months of 2019, total scheduled air seats from the U.S. East market declined 1.3 percent compared to the same period last year. Growth in air seat capacity from Chicago (+9.2%) and Atlanta (+3.4%) was offset by fewer seats from Minneapolis (-18.6%), Washington D.C. (-7.1%), New York JFK (-5.5%) and Dallas (-3.9%).

Market Conditions

- Domestic travel is expected to grow 2.6 percent year-over-year through June 2019, with business and leisure both contributing to the expansion. The business segment remains poised to outperform the leisure segment over the next six months, supported by strong but slowing business investment. Leisure travel growth is expected to remain around 2.2 percent as wage growth continues to firm and gasoline prices remain low.
- The Conference Board Consumer Confidence Index increased in February, following a decline in January. The Index now stands at 131.4, up from 121.7 in January. Consumer Confidence rebounded in February, which had been negatively impacted in recent months by financial market volatility and the government shutdown. Looking ahead, consumers expect the economy to continue expanding. However, according to The Conference Board's economic forecasts, the pace of expansion is expected to moderate in 2019.
- GDP in the January report points to a solid economic forecast for 2019. The U.S. economy grew at a solid pace in the fourth quarter, boding well for the outlook this year and next. According to the delayed release of GDP data, the economy grew by 2.6 percent in the fourth

quarter, this despite consumer spending slowing down compared to the middle of 2018. The latest surveys show consumer attitudes deteriorated during the government shutdown but quickly showed signs of recovery thereafter. With solid job growth and continued wage gains, consumers will increase their spending at a moderate pace in 2019 and 2020.

- With a softening of the global travel market, competition for American dollars is expected to heat up. Despite increased safety concerns, Mexico tourism officials are still forecasting an increase in both visitors and spending in 2019. Mexico is the sixth most visited country in the world, with tourism arrivals having climbed +3.4 percent in 2018, reaching a new record of 39.3 million foreign visitors. 2019 is expected to top that, with an estimated 44.8 million arrivals (+5.8% year-over-year).
- HTUSA and the Island Chapters conducted the U.S. East Leisure Sales Blitz which included travel agent training, a supplier trade show, roundtables, and cultural demonstrations on the East Coast in Boston, MA; Garden City, NY; West Orange, NJ; Philadelphia, PA; and Baltimore, MD, from Jan. 28-Feb. 1.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
O'ahu	3,037,409	2,790,893	8.8%	475,799	443,806	7.2%
Maui County	2,313,435	2,141,741	8.0%	342,121	339,151	0.9%
Maui	2,275,262	2,109,491	7.9%	335,211	332,156	0.9%
Moloka'i	40,988	37,692	8.7%	7,699	8,173	-5.8%
Lāna'i	54,250	44,367	22.3%	8,647	9,241	-6.4%
Kaua'i	1,133,321	1,044,604	8.5%	165,512	171,271	-3.4%
Island of Hawai'i	1,180,926	1,177,744	0.3%	193,284	206,717	-6.5%

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
O'ahu	1,802,994	1,639,172	10.0%	279,103	255,697	9.2%
Maui County	1,502,677	1,382,955	8.7%	209,972	202,775	3.5%
Maui	1,478,529	1,361,349	8.6%	205,599	198,476	3.6%
Moloka'i	24,393	22,561	8.1%	4,636	4,037	14.8%
Lāna'i	27,912	24,498	13.9%	4,476	4,273	4.7%
Kaua'i	721,015	658,645	9.5%	98,335	99,567	-1.2%
Island of Hawai'i	729,071	709,639	2.7%	119,668	120,067	-0.3%

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
O'ahu	1,234,414	1,151,721	7.2%	196,696	188,110	4.6%
Maui County	810,758	758,786	6.8%	132,149	136,376	-3.1%
Maui	796,733	748,142	6.5%	129,612	133,681	-3.0%
Moloka'i	16,595	15,132	9.7%	3,063	4,136	-25.9%
Lāna'i	26,338	19,869	32.6%	4,171	4,968	-16.0%
Kaua'i	412,306	385,959	6.8%	67,177	71,704	-6.3%
Island of Hawai'i	451,855	468,105	-3.5%	73,616	86,651	-15.0%

Airlift

	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	1,980,827	2,206,469	2,243,599	2,147,140	8,578,035	1,961,773	2,071,414	2,098,475	1,989,340	8,121,002	1.0	6.5	6.9	7.9	5.6
Anchorage	29,764	15,741	14,628	23,691	83,824	26,235	14,628	14,628	23,850	79,341	13.5	7.6	0.0	-0.7	5.7
Bellingham	10,494	954		7,473	18,921	10,176	0		7,632	17,808	3.1	NA		-2.1	6.3
Denver	79,820	97,006	98,072	98,072	372,970	78,390	79,261	80,132	80,132	317,915	1.8	22.4	22.4	22.4	17.3
Las Vegas	64,964	68,388	66,998	68,666	269,016	65,304	65,052	65,886	66,164	262,406	-0.5	5.1	1.7	3.8	2.5
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	604,001	701,740	732,974	651,076	2,689,791	647,820	730,161	746,372	622,183	2,746,536	-6.8	-3.9	-1.8	4.6	-2.1
Oakland	93,691	159,067	159,115	161,084	572,957	80,991	91,698	99,660	97,114	369,463	15.7	73.5	59.7	65.9	55.1
Phoenix	115,694	105,113	121,080	105,156	447,043	118,962	108,187	118,016	104,498	449,663	-2.7	-2.8	2.6	0.6	-0.6
Portland	119,397	111,824	79,081	97,422	407,724	106,887	100,443	79,801	102,648	389,779	11.7	11.3	-0.9	-5.1	4.6
Sacramento	46,063	55,557	56,004	55,764	213,388	37,620	38,038	38,456	39,270	153,384	22.4	46.1	45.6	42.0	39.1
Salt Lake City	39,816	17,998	18,308	21,828	97,950	39,433	23,678	20,327	27,812	111,250	1.0	-24.0	-9.9	-21.5	-12.0
San Diego	85,914	89,879	94,798	91,936	362,527	66,360	86,828	97,903	90,664	341,755	29.5	3.5	-3.2	1.4	6.1
San Francisco	335,308	394,854	408,030	373,855	1,512,047	348,943	382,572	377,092	361,713	1,470,320	-3.9	3.2	8.2	3.4	2.8
San Jose	74,234	101,253	114,644	112,609	402,740	83,191	98,420	97,028	89,692	368,331	-10.8	2.9	18.2	25.6	9.3
Seattle	264,657	269,896	262,479	261,120	1,058,152	251,461	246,778	245,786	258,580	1,002,605	5.2	9.4	6.8	1.0	5.5
US EAST	298,648	297,809	313,242	259,915	1,169,614	295,707	286,114	281,065	235,745	1,098,631	1.0	4.1	11.4	10.3	6.5
Atlanta	26,954	22,386	22,072	22,629	94,041	26,041	22,971	22,632	25,601	97,245	3.5	-2.5	-2.5	-11.6	-3.3
Boston		18,904	21,128	18,348	58,380		0	0	0	0		NA	NA	NA	NA
Chicago	67,218	51,550	53,872	51,818	224,458	56,784	56,784	52,052	45,162	210,782	18.4	-9.2	3.5	14.7	6.5
Dallas	95,004	96,096	99,372	71,253	361,725	99,264	99,180	99,099	69,615	367,158	-4.3	-3.1	0.3	2.4	-1.5
Detroit		492	10,332	1,968	12,792		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	4,699	55,456	24,236	15,559	12,656	6,135	58,586	-10.5	9.4	-4.8	-23.4	-5.3
New York JFK	25,512	25,298	25,576	28,282	104,668	26,496	25,298	25,576	28,528	105,898	-3.7	0.0	0.0	-0.9	-1.2
Newark	21,600	21,840	22,054	22,080	87,574	21,780	21,856	22,080	22,080	87,796	-0.8	-0.1	-0.1	0.0	-0.3
Washington D.C.	7,918	11,098	13,294	5,350	37,660	8,346	11,342	13,482	5,136	38,306	-5.1	-2.2	-1.4	4.2	-1.7

Source: Diao Mii airline schedules. Updated March 2019.

Group vs. FIT; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
Group vs FIT						
Group tour	136,540	143,303	-4.7%	26,211	25,933	1.1%
True Independent	5,225,861	4,715,662	10.8%	838,346	800,854	4.7%
Leisure vs business						
Pleasure (Net)	5,267,011	4,817,914	9.3%	789,655	770,246	2.5%
MCI (Net)	293,827	288,720	1.8%	77,347	70,791	9.3%
Convention/Conf.	184,435	173,210	6.5%	51,828	46,449	11.6%
Corp. Meetings	67,419	70,067	-3.8%	16,065	14,701	9.3%
Incentive	51,869	56,321	-7.9%	11,680	12,346	-5.4%

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
Group vs FIT						
Group tour	63,220	63,032	0.3%	11,894	9,690	22.7%
True Independent	3,499,813	3,145,441	11.3%	543,826	514,464	5.7%
Leisure vs business						
Pleasure (Net)	3,529,438	3,219,410	9.6%	514,100	490,909	4.7%
MCI (Net)	156,379	147,969	5.7%	39,276	34,066	15.3%
Convention/Conf.	97,000	88,950	9.0%	25,651	22,271	15.2%
Corp. Meetings	39,604	39,365	0.6%	9,504	7,799	21.9%
Incentive	24,463	24,694	-0.9%	5,195	5,122	1.4%

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
Group vs FIT						
Group tour	73,320	80,271	-8.7%	14,316	16,243	-11.9%
True Independent	1,726,048	1,570,221	9.9%	294,519	286,390	2.8%
Leisure vs business						
Pleasure (Net)	1,737,573	1,598,504	8.7%	275,555	279,337	-1.4%
MCI (Net)	137,448	140,751	-2.3%	38,070	36,724	3.7%
Convention/Conf.	87,434	84,259	3.8%	26,177	24,178	8.3%
Corp. Meetings	27,816	30,703	-9.4%	6,561	6,902	-4.9%
Incentive	27,405	31,627	-13.3%	6,485	7,224	-10.2%

First Timers vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
1st timers (%)	26.6	26.9	-0.2	23.8	23.6	0.2
Repeaters (%)	73.4	73.1	0.2	76.2	76.4	-0.2

U.S. West

U.S. WEST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
1st timers (%)	19.0	19.1	0.0	16.9	16.4	0.5
Repeaters (%)	81.0	80.9	0.0	83.1	83.6	-0.5

U.S. East

U.S. EAST MMA (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
1st timers (%)	41.5	41.9	-0.3	35.7	35.8	-0.1
Repeaters (%)	58.5	58.1	0.3	64.3	64.2	0.1

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2018	2017	% Change 2018 vs 2017	YTD Feb. 2019	YTD Feb. 2018	% change YTD
State tax revenue generated* (\$ Millions)	1,304.60	1,202.94	8.5%	221.03	223.91	-1.3%

*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 Feb. 2019	YTD Feb. 2018	% change YTD
State tax revenue generated* (\$ Millions)	773.08	709.78	8.9%	123.86	124.92	-0.8%

*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 Feb. 2019	YTD Feb. 2018	% change YTD
State tax revenue generated* (\$ Millions)	531.52	493.17	7.8%	97.17	98.99	-1.8%

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