



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 December 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (1,524,070) vs. MCI (93,466)
Average Length of Stay:	11.06 days
First Time Visitors:	23.8%
Repeat Visitors:	76.2%

U.S. Total

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
U.S. TOTAL (by Air)								
Visitor Expenditures* (\$ Millions)	11,118.3	11,636.2	4.7%	3,504.1	-69.9%	NA	11,636.2	NA
Visitor Days	59,030,584	61,786,807	4.7%	22,039,509	-64.3%	21,935,014	61,786,807	-64.5%
Arrivals	6,377,352	6,871,839	7.8%	1,881,291	-72.6%	1,982,449	6,871,839	-71.2%
Average Daily Census	161,728	169,279	4.7%	60,217	-64.4%	59,932	169,279	-64.6%
Per Person Per Day Spending* (\$)	188.3	188.3	0.0%	159.0	-15.6%	NA	188.3	NA
Per Person Per Trip Spending* (\$)	1,743.4	1,693.3	-2.9%	1,862.6	10.0%	NA	1,693.3	NA
Length of Stay (days)	9.26	8.99	-2.9%	11.72	30.3%	11.06	8.99	23.1%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecast.

¹ 2020 visitor data are preliminary. 2019 and 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

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
U.S. WEST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	6,588.4	6,952.0	5.5%	1,985.3	-71.4%	NA	6,952.0	NA
Visitor Days	37,477,016	39,752,689	6.1%	13,534,262	-66.0%	13,873,947	39,752,689	-65.1%
Arrivals	4,203,894	4,595,319	9.3%	1,209,596	-73.7%	1,306,388	4,595,319	-71.6%
Average Daily Census	102,677	108,911	6.1%	40,401	-62.9%	37,907	108,911	-65.2%
Per Person Per Day Spending* (\$)	175.8	174.9	-0.5%	146.7	-16.1%	NA	174.9	NA
Per Person Per Trip Spending* (\$)	1,567.2	1,512.8	-3.5%	1,641.3	8.5%	NA	1,512.8	NA
Length of Stay (days)	8.91	8.65	-3.0%	11.19	29.3%	10.62	8.65	22.8%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecast.

U.S. East

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
U.S. EAST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	4,529.9	4,684.2	3.4%	1,518.8	-67.6%	NA	4,684.2	NA
Visitor Days	21,553,568	22,034,119	2.2%	8,505,247	-61.4%	8,061,068	22,034,119	-63.4%
Arrivals	2,173,458	2,276,520	4.7%	671,695	-70.5%	676,061	2,276,520	-70.3%
Average Daily Census	59,051	60,367	2.2%	25,389	-57.9%	22,025	60,367	-63.5%
Per Person Per Day Spending* (\$)	210.2	212.6	1.2%	178.6	-16.0%	NA	212.6	NA
Per Person Per Trip Spending* (\$)	2,084.2	2,057.6	-1.3%	2,261.2	9.9%	NA	2,057.6	NA
Length of Stay (days)	9.92	9.68	-2.4%	12.66	30.8%	11.92	9.68	23.2%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecast.

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Market Summary

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in Hawai'i. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's (CDC) guidelines. The counties of Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in December. In addition, the CDC continued to enforce the "No Sail Order" on all cruise ships.

California residents returning from out of state in December 2020 were recommended to quarantine for 14 days. San Francisco also ordered a mandatory, 10-day quarantine for people coming from outside the nine-county Bay Area region. For Oregon, residents returning from other states or countries for non-essential travel were asked to self-quarantine for 14 days after arrival, but could end their quarantine early if they did not have any symptoms after 10 days, or after 7 days if they had a negative test within the 48 hours before ending quarantine. In Washington, a 14-day quarantine was recommended for returning residents, and residents were asked to stay close to home. In New York, returning residents in December 2020 were allowed to "test out" of the mandatory 10-day quarantine. Returning residents had to obtain a COVID test within three days of departure and quarantine for three days. On day four of their quarantine, the traveler had to obtain another COVID test. If both tests came back negative, the traveler could exit quarantine early upon receipt of the second negative diagnostic test.

In December 2020, 151,988 visitors arrived from U.S. West compared to 418,520 a year ago. These visitors spent \$280.4 million (-59.8%) and their average daily spending was \$157 per person (-12.8%). There were 71,537 visitors from U.S. East, compared to 215,358 in December 2019. U.S. East visitors spent \$170.4 million (-65.1%) and \$182 per person on an average daily basis.

U.S. West

- For all of 2020, arrivals decreased 71.6 percent to 1,306,388 visitors. Visitor days dropped 65.1 percent. The average daily census showed 37,907 visitors per day, down 65.2 percent compared to 2019.
- Scheduled air seats for 2020 fell 56.0 percent compared to the previous year, due to reduced service from Denver (-60.0%), Las Vegas (-67.0%), Long Beach (-71.8%), Los Angeles (-60.1%), Oakland (-47.2%), Phoenix (-60.0%), Portland (-61.5%), Sacramento (-45.7%), Salt Lake City (-47.0%), San Diego (-56.5%), San Francisco (-56.4%), San Jose (-52.6%) and Seattle (-44.2%).
- 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 visitors 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

- In 2020, arrivals declined 70.3 percent to 676,061 visitors. Visitor days fell 63.4 percent. The average daily census showed 22,025 visitors per day, a decrease of 63.5 percent compared to 2019.
- Scheduled air seats declined 58.7 percent for 2020 as a result of reduced service from Atlanta (-70.3%), Boston (-69.0%), Chicago (-50.0%), Dallas (-44.9%), Detroit (-86.6%), Houston (-68.5%), Minneapolis (-61.2%), New York JFK (-74.7%), Newark (-72.2%) and Washington D.C. (-81.4%).
- 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

- The U.S. unemployment rate in November fell to 6.7 percent.
- The Conference Board Consumer Confidence Index declined in December, after decreasing in November. The Index now stands at 88.6 (1985=100), down from 92.9 in November.
- The Present Situation Index based on consumers' assessment of current business and labor market conditions decreased sharply from 105.9 to 90.3.
- The Expectations Index based on consumers' short-term outlook for income, business, and labor market conditions increased from 84.3 in November to 87.5 this month.
- Major U.S. wholesalers continue to be challenged with each change of Hawai'i's Safe Travels program and how to communicate with their customers about the changes. Their focus continues to be Hawai'i's safety and protocol guide, travel insurance/protection, and travel advisor educational messaging.
- Softness will remain in Quarter 1 with a bit of uptick for summer travel. Most of the major U.S. wholesalers reported that they see an increase in travel for summer and feel that customers believe things will be more stable by then. There is potential for last minute bookings for March and April travel.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for January-March 2021 will decrease by 9.3 percent as compared with the same time period of 2020. The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the decrease in scheduled air seats is expected to occur in all major market areas including U.S. West (-7.5%) and U.S. East (-20.7%). The situation is being monitored and the forecast adjusted accordingly.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	3,043,894	3,326,507	9.3%	963,021	3,326,507	-71.1%
Maui County	2,315,314	2,488,629	7.5%	671,779	2,488,629	-73.0%
Maui	2,277,080	2,449,124	7.6%	658,972	2,449,124	-73.1%
Moloka'i	41,167	42,603	3.5%	12,210	42,603	-71.3%
Lāna'i	55,484	59,810	7.8%	14,517	59,810	-75.7%
Kaua'i	1,134,420	1,135,672	0.1%	280,866	1,135,672	-75.3%
Island of Hawai'i	1,183,715	1,251,171	5.7%	379,096	1,251,171	-69.7%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	1,795,039	2,005,506	11.7%	578,019	2,005,506	-71.2%
Maui County	1,501,888	1,641,441	9.3%	438,390	1,641,441	-73.3%
Maui	1,477,805	1,616,213	9.4%	430,048	1,616,213	-73.4%
Moloka'i	24,176	25,823	6.8%	7,408	25,823	-71.3%
Lāna'i	28,258	31,672	12.1%	7,962	31,672	-74.9%
Kaua'i	719,930	730,725	1.5%	179,734	730,725	-75.4%
Island of Hawai'i	729,244	786,520	7.9%	244,973	786,520	-68.9%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	1,248,855	1,321,001	5.8%	385,002	1,321,001	-70.9%
Maui County	813,426	847,188	4.2%	233,389	847,188	-72.5%
Maui	799,275	832,911	4.2%	228,924	832,911	-72.5%
Moloka'i	16,991	16,780	-1.2%	4,802	16,780	-71.4%
Lāna'i	27,226	28,138	3.3%	6,554	28,138	-76.7%
Kaua'i	414,489	404,948	-2.3%	101,132	404,948	-75.0%
Island of Hawai'i	454,472	464,651	2.2%	134,123	464,651	-71.1%

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

	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
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.

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	143,078	5.0%	35,458	143,078	-75.2%
True Independent (Net)	5,233,615	5,674,869	8.4%	1,739,480	5,674,869	-69.3%
Leisure vs business						
Pleasure (Net)	5,277,345	5,720,309	8.4%	1,524,070	5,720,309	-73.4%
MCI (Net)	293,911	293,659	-0.1%	93,466	293,659	-68.2%
Convention/Conf.	184,569	171,970	-6.8%	60,368	171,970	-64.9%
Corp. Meetings	67,184	72,478	7.9%	20,115	72,478	-72.2%
Incentive	52,022	59,031	13.5%	15,936	59,031	-73.0%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	67,037	6.5%	16,140	67,037	-75.9%
True Independent (Net)	3,493,923	3,836,896	9.8%	1,164,871	3,836,896	-69.6%
Leisure vs business						
Pleasure (Net)	3,524,847	3,885,753	10.2%	1,020,345	3,885,753	-73.7%
MCI (Net)	156,181	154,692	-1.0%	47,963	154,692	-69.0%
Convention/Conf.	96,954	91,100	-6.0%	29,958	91,100	-67.1%
Corp. Meetings	39,528	42,499	7.5%	11,252	42,499	-73.5%
Incentive	24,371	25,831	6.0%	8,142	25,831	-68.5%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	76,041	3.6%	19,318	76,041	-74.6%
True Independent (Net)	1,739,692	1,837,972	5.6%	574,609	1,837,972	-68.7%
Leisure vs business						
Pleasure (Net)	1,752,498	1,834,556	4.7%	503,725	1,834,556	-72.5%
MCI (Net)	137,730	138,967	0.9%	45,503	138,967	-67.3%
Convention/Conf.	87,615	80,869	-7.7%	30,410	80,869	-62.4%
Corp. Meetings	27,655	29,980	8.4%	8,863	29,980	-70.4%
Incentive	27,651	33,199	20.1%	7,794	33,199	-76.5%

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 Dec. 2020P1/	YTD Dec. 2019	% change YTD
1st timers (%)	26.7	26.7	0.0	23.8	26.7	-3.0
Repeaters (%)	73.3	73.3	0.0	76.2	73.3	3.0

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
1st timers (%)	19.0	19.4	0.4	16.9	19.4	-2.5
Repeaters (%)	81.0	80.6	-0.4	83.1	80.6	2.5

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
1st timers (%)	41.5	41.5	0.0	37.1	41.5	-4.5
Repeaters (%)	58.5	58.5	0.0	62.9	58.5	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 Dec. 2020P	YTD Dec. 2019	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,358.25	4.7%	NA	1,358.25	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 Dec. 2020P	YTD Dec. 2019	% change YTD
State tax revenue generated* (\$ Millions)	769.04	811.48	5.5%	NA	811.48	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 Dec. 2020P	YTD Dec. 2019	% change YTD
State tax revenue generated* (\$ Millions)	528.76	546.77	3.4%	NA	546.77	NA

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