



U.S. Fact Sheet

United States Overview

The Hawai'i Visitors and Convention Bureau (HVCB) is contracted by the HTA for brand marketing management services for the United States major market area. The U.S. West and U.S. East are Hawai'i's two largest source markets for visitors. The U.S. West market includes visitors who travel to Hawai'i from the 12 states west of the Rockies, and the U.S. East includes all other states. HVCB's COVID-19 recovery plan continues to focus on welcoming back repeat visitors who know the islands and want to *malama* (take care of) Hawai'i during their visit. In 2021, efforts to educate visitors pre- and post-arrival about Hawai'i's Safe Travels program will continue. HVCB will promote the Mālama Hawai'i campaign, a partnership with visitor industry partners and volunteer organizations that invites visitors to stay in a new way – to take the time to really know the island, form a deeper connection with Hawai'i's culture, travel mindfully and *malama* Hawai'i.

January 2021 Quick Facts¹

Visitor Expenditures:	\$363.6 million
Primary Purpose of Stay:	Pleasure (126,519) vs. MCI (1,484)
Average Length of Stay:	14.1 days
First Time Visitors:	22.7%
Repeat Visitors:	77.3%

U.S. Total

	2019	2020P	% Change 2020P vs 2019	2021* Forecast	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
U.S. TOTAL (by Air)							
Visitor Expenditures* (\$ Millions)	11,636.2	NA	NA	7,163.5	363.6	1,129.1	-67.8%
Visitor Days	61,786,807	21,935,014	-64.5%	40,918,390	2,298,135	5,588,753	-58.9%
Arrivals	6,871,839	1,982,449	-71.2%	4,255,154	162,808	552,578	-70.5%
Average Daily Census	169,279	59,932	-64.6%	111,799	74,133	180,282	-58.9%
Per Person Per Day Spending* (\$)	188.3	NA	NA	175.1	158.2	202.0	-21.7%
Per Person Per Trip Spending* (\$)	1,693.3	NA	NA	1,683.5	2,233.3	2,043.2	9.3%
Length of Stay (days)	8.99	11.06	23.1%	9.62	14.12	10.11	39.6%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2020).

¹ 2020 visitor data are preliminary. 2019 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

	2019	2020P	% Change 2020P vs 2019	2021* Forecast	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
U.S. WEST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	6,952.0	NA	NA	4,108.5	225.7	621.7	-63.7%
Visitor Days	39,752,689	13,873,947	-65.1%	25,264,696	1,471,794	3,337,398	-55.9%
Arrivals	4,595,319	1,306,388	-71.6%	2,742,073	112,020	352,525	-68.2%
Average Daily Census	108,911	37,907	-65.2%	69,218	47,477	107,658	-55.9%
Per Person Per Day Spending* (\$)	174.9	NA	NA	162.6	153.3	186.3	-17.7%
Per Person Per Trip Spending* (\$)	1,512.8	NA	NA	1,498.3	2,014.6	1,763.4	14.2%
Length of Stay (days)	8.65	10.62	22.8%	9.21	13.14	9.47	38.8%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2020).

U.S. East

	2019	2020P	% Change 2020P vs 2019	2021* Forecast	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
U.S. EAST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	4,684.2	NA	NA	3,055.0	137.9	507.4	-72.8%
Visitor Days	22,034,119	8,061,068	-63.4%	15,653,695	826,341	2,251,355	-63.3%
Arrivals	2,276,520	676,061	-70.3%	1,513,081	50,788	200,053	-74.6%
Average Daily Census	60,367	22,025	-63.5%	42,887	26,656	72,624	-63.3%
Per Person Per Day Spending* (\$)	212.6	NA	NA	195.2	166.9	225.4	-25.9%
Per Person Per Trip Spending* (\$)	2,057.6	NA	NA	2,019.1	2,715.6	2,536.3	7.1%
Length of Stay (days)	9.68	11.92	23.2%	10.35	16.27	11.25	44.6%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2020).

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 Visitors & Convention Bureau
 2270 Kalākaua Avenue, Suite 801
 Honolulu, Hawai'i 96815
 Telephone: (808) 924-0220
italwar@hvcb.org

Market Summary

During January, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. 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. On December 2, 2020 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. However, starting January 5, 2021 Kaua'i County rejoined the Safe Travels program for inter-island arrivals, allowing inter-island travelers who have been in Hawai'i for more than three days to bypass the quarantine with a valid test result. Also starting January 5 on Kaua'i, trans-Pacific travelers were given the option of participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in January. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

In terms of travel restrictions that were in place for key U.S. West markets during January 2021, California residents returning from non-essential travel were encouraged to quarantine for 10 days. San Francisco, Santa Clara, and Los Angeles counties ordered a mandatory 10-day quarantine for people coming from outside their regions. In Oregon, returning residents were advised to practice self-quarantine for 14 days after arrival. Washington continued to recommend a 14-day quarantine for residents returning from interstate and international travel. Furthermore, there was a required 14-day quarantine for anyone returning to Washington state after visiting the United Kingdom, South Africa, and other countries where a new variant of COVID-19 has been circulating. In New York, returning residents in January could "test out" of the mandatory 10-day quarantine. Returning residents were required to obtain a COVID-19 test within three days before their return to New York, and also quarantine for three days. On the fourth day of their quarantine, the traveler had to obtain another COVID-19 test. If both tests came back negative, the traveler could exit quarantine early upon receipt of the second negative diagnostic test.

U.S. West

- In January 2021, 112,020 visitors arrived from U.S. West compared to 352,525 a year ago. These visitors spent \$225.7 million (-63.7%) in January, and their average daily spending was \$153 per person (-17.7%).
- There were 2,495 (-30.6%) scheduled flights from U.S. West in January 2021, with 499,872 (-30.5%) seats. Service from Anchorage (7,473 seats, -31.9%), Denver (13,689, -54.1%), Las Vegas (16,124, -36.7%), Long Beach (4,347, -25.8%), Los Angeles (125,594, -36.9%), Oakland (39,580, -26.6%), Phoenix (24,846, -33.8%), Portland (22,453, -42.9%), Sacramento (22,107, -9.2%), Salt Lake City (12,030, -17.9%), San Diego (26,310, -6.3%), San Francisco (70,107, -39.0%), and Seattle (71,425, -26.5%) was significantly reduced compared to January 2020.
- In 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.
- 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

- There were 50,788 visitors from U.S. East in January 2021, compared to 200,053 a year ago. East visitors spent \$137.9 million (-72.8%) and \$167 per person, per day (-25.9%).
- 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 in 2020 declined 58.7 percent compared to the previous year.
- 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 January 2021 fell to 6.3 percent.
- The Conference Board Consumer Confidence Index improved moderately in January 2021, after decreasing in December 2020. The Index now stands at 89.3 (1985=100), up from 87.1 in December. The Present Situation Index based on consumers' assessment of current business and labor market conditions decreased from 87.2 to 84.4. The Expectations Index based on consumers' short-term outlook for income, business and labor market conditions increased from 87.0 in December 2020 to 92.5 in January 2021.
- 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 2021 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 February - April 2021 will increase by 46.1 percent as compared with the same time period of 2020 (April 2020 was the first month of the 14-day quarantine and the immediate reduction of flights). The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue in all major market areas including U.S. West

(+46.8%) and U.S. East (+39.5%). The situation is being monitored and the forecast adjusted accordingly.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
O'ahu	3,326,507	963,021	-71.1%	73,759	271,707	-72.9%
Maui County	2,488,629	671,779	-73.0%	64,736	189,479	-65.8%
Maui	2,449,124	658,972	-73.1%	63,860	185,594	-65.6%
Moloka'i	42,603	12,210	-71.3%	785	3,986	-80.3%
Lāna'i	59,810	14,517	-75.7%	895	4,466	-80.0%
Kaua'i	1,135,672	280,866	-75.3%	3,775	91,504	-95.9%
Island of Hawai'i	1,251,171	379,096	-69.7%	32,905	111,994	-70.6%

U.S. West

U.S. WEST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
O'ahu	2,005,506	578,019	-71.2%	46,305	159,121	-70.9%
Maui County	1,641,441	438,390	-73.3%	46,362	116,511	-60.2%
Maui	1,616,213	430,048	-73.4%	45,819	113,963	-59.8%
Moloka'i	25,823	7,408	-71.3%	496	2,405	-79.4%
Lāna'i	31,672	7,962	-74.9%	513	2,429	-78.9%
Kaua'i	730,725	179,734	-75.4%	2,290	54,988	-95.8%
Island of Hawai'i	786,520	244,973	-68.9%	23,234	69,086	-66.4%

U.S. East

U.S. EAST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
O'ahu	1,321,001	385,002	-70.9%	27,454	112,586	-75.6%
Maui County	847,188	233,389	-72.5%	18,374	72,967	-74.8%
Maui	832,911	228,924	-72.5%	18,041	71,631	-74.8%
Moloka'i	16,780	4,802	-71.4%	289	1,582	-81.7%
Lāna'i	28,138	6,554	-76.7%	382	2,037	-81.2%
Kaua'i	404,948	101,132	-75.0%	1,485	36,516	-95.9%
Island of Hawai'i	464,651	134,123	-71.1%	9,670	42,908	-77.5%

Airlift

	2020	2019	% CHANGE
US WEST	3,772,048	8,564,295	-56.0
Anchorage	38,001	87,818	-56.7
Bellingham	0	11,448	-100.0
Denver	151,196	377,702	-60.0
Las Vegas	89,658	271,462	-67.0
Long Beach	19,467	68,985	-71.8
Los Angeles	1,064,204	2,664,694	-60.1
Oakland	301,658	571,783	-47.2
Phoenix	178,178	445,683	-60.0
Portland	157,607	409,335	-61.5
Sacramento	122,192	225,055	-45.7
Salt Lake City	52,546	99,051	-47.0
San Diego	156,944	360,613	-56.5
San Francisco	655,968	1,504,609	-56.4
San Jose	192,437	405,642	-52.6
Seattle	591,992	1,060,415	-44.2

	2020	2019	% CHANGE
US EAST	487,874	1,182,495	-58.7
Atlanta	27,706	93,346	-70.3
Boston	18,070	58,380	-69.0
Chicago	113,955	227,734	-50.0
Dallas	205,890	373,473	-44.9
Detroit	1,758	13,168	-86.6
Houston	41,876	132,860	-68.5
Minneapolis	20,945	53,980	-61.2
New York JFK	26,282	103,930	-74.7
Newark	24,330	87,600	-72.2
Washington D.C.	7,062	38,024	-81.4

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules.

U.S. Total

U.S. TOTAL (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	143,078	35,458	-75.2%	1,233	12,449	-90.1%
True Independent (Net)	5,674,869	1,739,480	-69.3%	150,643	478,249	-68.5%
Leisure vs business						
Pleasure (Net)	5,720,309	1,524,070	-73.4%	126,519	440,739	-71.3%
MCI (Net)	293,659	93,466	-68.2%	1,484	41,983	-96.5%
Convention/Conf.	171,970	60,368	-64.9%	569	30,609	-98.1%
Corp. Meetings	72,478	20,115	-72.2%	525	7,577	-93.1%
Incentive	59,031	15,936	-73.0%	431	4,933	-91.3%

U.S. West

U.S. WEST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	67,037	16,140	-75.9%	768	5,492	-86.0%
True Independent (Net)	3,836,896	1,164,871	-69.6%	104,341	309,584	-66.3%
Leisure vs business						
Pleasure (Net)	3,885,753	1,020,345	-73.7%	89,266	286,845	-68.9%
MCI (Net)	154,692	47,963	-69.0%	952	20,885	-95.4%
Convention/Conf.	91,100	29,958	-67.1%	354	14,770	-97.6%
Corp. Meetings	42,499	11,252	-73.5%	368	4,172	-91.2%
Incentive	25,831	8,142	-68.5%	260	2,475	-89.5%

U.S. East

U.S. EAST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	76,041	19,318	-74.6%	466	6,958	-93.3%
True Independent (Net)	1,837,972	574,609	-68.7%	46,302	168,665	-72.5%
Leisure vs business						
Pleasure (Net)	1,834,556	503,725	-72.5%	37,252	153,893	-75.8%
MCI (Net)	138,967	45,503	-67.3%	532	21,097	-97.5%
Convention/Conf.	80,869	30,410	-62.4%	216	15,839	-98.6%
Corp. Meetings	29,980	8,863	-70.4%	157	3,405	-95.4%
Incentive	33,199	7,794	-76.5%	171	2,458	-93.0%

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)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
1st timers (%)	26.7	23.8	-3.0	22.7	23.5	-0.9
Repeaters (%)	73.3	76.2	3.0	77.3	76.5	0.9

U.S. West

U.S. WEST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
1st timers (%)	19.4	16.9	-2.5	15.6	16.9	-1.2
Repeaters (%)	80.6	83.1	2.5	84.4	83.1	1.2

U.S. East

U.S. EAST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Jan. 2021P 1/	YTD Jan. 2020P	% change YTD
1st timers (%)	41.5	37.1	-4.5	38.3	35.3	2.9
Repeaters (%)	58.5	62.9	4.5	61.7	64.7	-2.9

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)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	1,358.25	NA	NA	42.44	131.79	-67.8

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

U.S. West

U.S. WEST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	811.48	NA	NA	26.34	72.56	-63.7

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

U.S. East

U.S. EAST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Jan. 2021P	YTD Jan. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	546.77	NA	NA	16.10	59.23	-72.8

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