



## 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 *mālama* (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 *mālama* Hawai'i.

### Year-to-Date February 2021 Quick Facts<sup>1</sup>

Visitor Expenditures:	\$744.3 million
Primary Purpose of Stay:	Pleasure (316,767) vs. MCI (3,892)
Average Length of Stay:	12.1 days
First Time Visitors:	23.1%
Repeat Visitors:	76.9%

### U.S. Total

U.S. TOTAL (by Air)	2019	2020P	% Change 2020P vs 2019	2021 Annual Forecast*	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
Visitor Expenditures* (\$ Millions)	11,636.2	NA	NA	7,833.4	744.3	2,120.3	-64.9%
Visitor Days	61,786,807	21,935,014	-64.5%	42,553,079	4,740,982	10,549,492	-55.1%
Arrivals	6,871,839	1,982,449	-71.2%	4,403,876	391,568	1,102,204	-64.5%
Average Daily Census	169,279	59,932	-64.6%	116,265	80,356	175,825	-54.3%
Per Person Per Day Spending* (\$)	188.3	NA	NA	184.1	157.0	201.0	-21.9%
Per Person Per Trip Spending* (\$)	1,693.3	NA	NA	1,778.7	1,900.7	1,923.7	-1.2%
Length of Stay (days)	8.99	11.06	23.1%	9.66	12.11	9.57	26.5%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

<sup>1</sup> 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 Annual Forecast*	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
U.S. WEST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	6,952.0	NA	NA	4,850.7	490.3	1,194.6	-59.0%
Visitor Days	39,752,689	13,873,947	-65.1%	28,031,536	3,158,764	6,389,161	-50.6%
Arrivals	4,595,319	1,306,388	-71.6%	3,002,696	276,881	708,041	-60.9%
Average Daily Census	108,911	37,907	-65.2%	76,799	53,538	106,486	-49.7%
Per Person Per Day Spending* (\$)	174.9	NA	NA	173.0	155.2	187.0	-17.0%
Per Person Per Trip Spending* (\$)	1,512.8	NA	NA	1,615.5	1,770.6	1,687.2	4.9%
Length of Stay (days)	8.65	10.62	22.8%	9.34	11.41	9.02	26.4%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

## U.S. East

	2019	2020P	% Change 2020P vs 2019	2021 Annual Forecast*	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
U.S. EAST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	4,684.2	NA	NA	2,982.6	254.0	925.7	-72.6%
Visitor Days	22,034,119	8,061,068	-63.4%	14,521,543	1,582,217	4,160,331	-62.0%
Arrivals	2,276,520	676,061	-70.3%	1,401,180	114,687	394,163	-70.9%
Average Daily Census	60,367	22,025	-63.5%	39,785	26,817	69,339	-61.3%
Per Person Per Day Spending* (\$)	212.6	NA	NA	205.4	160.5	222.5	-27.9%
Per Person Per Trip Spending* (\$)	2,057.6	NA	NA	2,128.7	2,214.7	2,348.6	-5.7%
Length of Stay (days)	9.68	11.92	23.2%	10.36	13.80	10.55	30.7%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

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## Market Summary

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During February 2021, 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. Kaua'i County continued to temporarily suspend its participation in the Safe Travels program for trans-Pacific travelers, but inter-island travelers who had been in Hawai'i for more than three days could bypass the quarantine with a valid test result. Trans-Pacific travelers to Kaua'i 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 and Maui also had a partial quarantine in place in February. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

Key U.S. West markets had travel restrictions in place during February 2021. California residents were advised to quarantine for 10 days after reentering the state. San Francisco and Santa Clara counties maintained their mandatory 10-day quarantine for people coming from outside their region. In Oregon, returning residents were encouraged to self-quarantine for 14 days after their return. In Washington, a 14-day quarantine was recommended for residents returning from interstate and international travel. In New York, all travelers, including returning residents, had the option to "test out" of the mandatory 10-day quarantine for asymptomatic individuals. A COVID-19 test was required within three days before their return to New York, followed by three days of quarantine. On day four of their quarantine, the traveler had to obtain a second COVID-19 test. If both tests came back negative, they could exit quarantine early upon receipt of the second negative diagnostic test.

### U.S. West

- In the first two months of 2021, U.S. West visitors spent \$490.3 million (-59.0%), and their average daily spending was \$155 per person (-17.0%). A total of 276,881 visitors were from U.S. West compared to 708,041 visitors in the same period last year. The average daily census showed 53,538 visitors per day compared to 106,486 visitor period in the first two months of 2020.
- In the first two months of 2021, there were 4,735 (-32.2%) scheduled flights with 949,417 (-32.3%) seats. Service from Anchorage (13,833 seats, -33.6%), Denver (30,420, -47.9%), Las Vegas (31,414, -36.2%), Long Beach (8,127, -28.3%), Los Angeles (228,769, -40.4%), Oakland (73,180, -30.7%), Phoenix (47,978, -34.8%), Portland (42,919, -45.0%), Sacramento (40,643, -15.3%), Salt Lake City (23,454, -16.6%), San Diego (48,072, -11.9%), San Francisco (135,059, -40.7%), and Seattle (141,551, -24.0%) was significantly reduced compared to year-to-date 2020.
- 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.
- 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 the first two months of 2021, U.S. East visitors spent \$254.0 million (-72.6%), and their average daily spending was \$161 per person (-27.9%). A total of 114,687 visitors came from U.S. East compared to 394,163 visitors in the same period last year. The average daily census showed 26,817 visitors per day compared to 69,339 visitor period in the first two months of 2020.
- In the first two months of 2021, there were 461 (-43.2%) scheduled flights from U.S. East, with 116,455 (-49.8%) seats. Flights from Detroit and Washington, D.C. were suspended. Service from Atlanta (9,698 seats, -44.8%), Boston (4,448, -61.9%), Chicago (20,927, -59.9%), Dallas (56,362, -28.9%), Houston (8,774, -59.8%), Minneapolis (8,996, -28.6%), New York (JFK) (6,394, -63.8%), and Newark (856, -94.1%) was substantially decreased compared to the first two months of 2020.
- For all of 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

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- Hiring was stronger than expected in February 2021 as U.S. payrolls gained a surprising 379,000 jobs, mostly from the leisure/hospitality sector as COVID-related restrictions rolled back in some states. The leisure and hospitality industries have been particularly hard hit by shutdown orders and employ 3.5 million fewer people than a year ago. The February gains included 286,000 jobs in food services and drinking establishments as well as businesses like hotels and gyms, according to Comerica.
- The Conference Board Consumer Confidence Index improved again in February 2021, after increasing in January. The Index now stands at 91.3 (1985=100), up from 88.9 in January. The Present Situation Index based on consumers' assessment of current business and labor market conditions climbed from 85.5 to 92.0. The Expectations Index based on consumers' short-term outlook for income, business and labor market conditions fell marginally, from 91.2 last month to 90.8 in February.
- Major U.S. wholesalers' focus continues to be Hawai'i's safety and protocol guide, travel insurance/protection, and travel advisor educational messaging.
- Most of the major U.S. wholesalers have 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 April travel.

- The forecast for domestic scheduled nonstop air seats to Hawai'i for March - May 2021 will increase by +158.5 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 (+156.0%) and U.S. East (+177.7%). 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 Feb. 2021P	YTD Feb. 2020P	% change YTD
O'ahu	3,326,507	963,021	-71.1%	175,026	538,093	-67.5%
Maui County	2,488,629	671,779	-73.0%	156,970	379,101	-58.6%
Maui	2,449,124	658,972	-73.1%	154,751	371,333	-58.3%
Moloka'i	42,603	12,210	-71.3%	1,743	7,735	-77.5%
Lāna'i	59,810	14,517	-75.7%	2,448	9,269	-73.6%
Kaua'i	1,135,672	280,866	-75.3%	10,892	184,230	-94.1%
Island of Hawai'i	1,251,171	379,096	-69.7%	78,473	220,839	-64.5%

### U.S. West

U.S. WEST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
O'ahu	2,005,506	578,019	-71.2%	113,071	317,305	-64.4%
Maui County	1,641,441	438,390	-73.3%	115,270	233,840	-50.7%
Maui	1,616,213	430,048	-73.4%	113,797	228,858	-50.3%
Moloka'i	25,823	7,408	-71.3%	1,137	4,614	-75.4%
Lāna'i	31,672	7,962	-74.9%	1,478	4,957	-70.2%
Kaua'i	730,725	179,734	-75.4%	6,793	111,794	-93.9%
Island of Hawai'i	786,520	244,973	-68.9%	57,072	136,441	-58.2%

### U.S. East

U.S. EAST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
O'ahu	1,321,001	385,002	-70.9%	61,955	220,788	-71.9%
Maui County	847,188	233,389	-72.5%	41,699	145,261	-71.3%
Maui	832,911	228,924	-72.5%	40,954	142,475	-71.3%
Moloka'i	16,780	4,802	-71.4%	607	3,121	-80.6%
Lāna'i	28,138	6,554	-76.7%	970	4,312	-77.5%
Kaua'i	404,948	101,132	-75.0%	4,099	72,436	-94.3%
Island of Hawai'i	464,651	134,123	-71.1%	21,401	84,398	-74.6%

# Airlift

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>US WEST</b>	<b>1,554,976</b>	<b>2,256,467</b>	<b>2,430,649</b>	<b>2,287,939</b>	<b>8,530,031</b>	<b>2,022,576</b>	<b>253,873</b>	<b>423,959</b>	<b>1,071,640</b>	<b>3,772,048</b>	<b>-23.1</b>	<b>788.8</b>	<b>473.3</b>	<b>113.5</b>	<b>126.1</b>
Anchorage	19,875	15,741	24,486	29,256	89,358	29,256	0	0	8,745	38,001	-32.1	NA	NA	234.5	135.1
Austin	0	6,950	9,452	7,228	23,630	0	0	0	0	0	NA	NA	NA	NA	NA
Denver	55,187	93,043	106,015	103,532	357,777	80,667	507	12,702	57,320	151,196	-31.6	18,251.7	734.6	80.6	136.6
Las Vegas	43,090	52,519	75,625	75,714	246,948	69,576	0	0	20,082	89,658	-38.1	NA	NA	277.0	175.4
Long Beach	25,683	66,248	51,226	34,776	177,933	16,443	0	0	3,024	19,467	56.2	NA	NA	1,050.0	814.0
Los Angeles	382,517	631,810	727,613	711,950	2,453,890	556,146	99,818	140,956	267,284	1,064,204	-31.2	533.0	416.2	166.4	130.6
Oakland	112,548	130,872	101,514	52,164	397,098	153,858	32,375	32,200	83,225	301,658	-26.8	304.2	215.3	-37.3	31.6
Ontario	2,079	14,364	17,388	17,388	51,219	0	0	0	0	0	NA	NA	NA	NA	NA
Phoenix	91,993	137,802	116,128	138,864	484,787	102,399	0	6,272	69,507	178,178	-10.2	NA	1,751.5	99.8	172.1
Portland	75,665	89,299	98,693	109,664	373,321	110,849	0	15,498	31,260	157,607	-31.7	NA	536.8	250.8	136.9
Sacramento	64,464	66,248	51,226	34,776	216,714	71,883	700	11,340	38,269	122,192	-10.3	9,364.0	351.7	-9.1	77.4
Salt Lake City	41,050	47,637	47,748	47,748	184,183	41,020	0	0	11,526	52,546	0.1	NA	NA	314.3	250.5
San Diego	74,971	112,483	131,643	101,476	420,573	79,758	0	20,282	56,904	156,944	-6.0	NA	549.1	78.3	168.0
San Francisco	211,029	321,823	382,164	374,611	1,289,627	332,865	55,630	100,571	166,902	655,968	-36.6	478.5	280.0	124.5	96.6
San Jose	130,016	152,561	137,909	96,784	517,270	114,667	525	0	77,245	192,437	13.4	28,959.2	NA	25.3	168.8
Santa Ana	0	7,056	11,592	11,592	30,240	0	0	0	0	0	NA	NA	NA	NA	NA
Seattle	224,809	310,011	340,227	340,416	1,215,463	263,189	64,318	84,138	180,347	591,992	-14.6	382.0	304.4	88.8	105.3
<b>US EAST</b>	<b>208,269</b>	<b>336,538</b>	<b>397,580</b>	<b>358,374</b>	<b>1,300,761</b>	<b>330,695</b>	<b>8,458</b>	<b>33,315</b>	<b>115,406</b>	<b>487,874</b>	<b>-37.0</b>	<b>3,878.9</b>	<b>1,093.4</b>	<b>210.5</b>	<b>166.6</b>
Atlanta	16,136	23,603	26,956	26,956	93,651	24,542	0	0	3,164	27,706	-34.3	NA	NA	752.0	238.0
Boston	7,228	12,232	18,070	18,348	55,878	16,958	0	0	1,112	18,070	-57.4	NA	NA	1,550.0	209.2
Charlotte	0	15,288	18,837	0	34,125	0	0	0	0	0	NA	NA	NA	NA	NA
Chicago	38,222	75,416	89,334	76,761	279,733	74,438	1,284	7,665	30,568	113,955	-48.7	5,773.5	1,065.5	151.1	145.5
Dallas	102,892	109,027	113,577	121,041	446,537	109,434	6,318	25,650	64,488	205,890	-6.0	1,625.7	342.8	87.7	116.9
Detroit	0	0	0	0	1,758	0	0	0	0	1,758	NA	NA	NA	NA	NA
Houston	15,622	27,874	33,488	33,488	110,472	32,032	856	0	8,988	41,876	-51.2	3,156.3	NA	272.6	163.8
Minneapolis	13,994	18,594	20,792	20,792	74,172	18,459	0	0	2,486	20,945	-24.2	NA	NA	736.4	254.1
New York JFK	10,842	19,738	25,576	25,576	81,732	24,892	0	0	1,390	26,282	-56.4	NA	NA	1,740.0	211.0
Newark	1,665	17,866	26,368	22,898	68,797	21,120	0	0	3,210	24,330	-92.1	NA	NA	613.3	182.8
Orlando	1,668	8,340	9,174	6,950	26,132	0	0	0	0	0	NA	NA	NA	NA	NA
Washington D.C.	0	8,560	15,408	5,564	29,532	7,062	0	0	0	7,062	-100.0	NA	NA	NA	318.2

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of March 18, 2021, subject to change.

## U.S. Total

U.S. TOTAL (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	143,078	35,458	-75.2%	2,959	25,099	-88.2%
True Independent (Net)	5,674,869	1,739,480	-69.3%	358,109	948,914	-62.3%
Leisure vs business						
Pleasure (Net)	5,720,309	1,524,070	-73.4%	316,767	890,996	-64.4%
MCI (Net)	293,659	93,466	-68.2%	3,892	77,045	-94.9%
Convention/Conf.	171,970	60,368	-64.9%	1,478	52,453	-97.2%
Corp. Meetings	72,478	20,115	-72.2%	1,230	15,720	-92.2%
Incentive	59,031	15,936	-73.0%	1,290	11,225	-88.5%

## U.S. West

U.S. WEST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	67,037	16,140	-75.9%	1,878	10,705	-82.5%
True Independent (Net)	3,836,896	1,164,871	-69.6%	255,126	620,595	-58.9%
Leisure vs business						
Pleasure (Net)	3,885,753	1,020,345	-73.7%	228,566	582,773	-60.8%
MCI (Net)	154,692	47,963	-69.0%	2,620	38,636	-93.2%
Convention/Conf.	91,100	29,958	-67.1%	1,009	25,675	-96.1%
Corp. Meetings	42,499	11,252	-73.5%	843	8,577	-90.2%
Incentive	25,831	8,142	-68.5%	838	5,467	-84.7%

## U.S. East

U.S. EAST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	76,041	19,318	-74.6%	1,081	14,395	-92.5%
True Independent (Net)	1,837,972	574,609	-68.7%	102,983	328,319	-68.6%
Leisure vs business						
Pleasure (Net)	1,834,556	503,725	-72.5%	88,201	308,224	-71.4%
MCI (Net)	138,967	45,503	-67.3%	1,272	38,409	-96.7%
Convention/Conf.	80,869	30,410	-62.4%	470	26,778	-98.2%
Corp. Meetings	29,980	8,863	-70.4%	387	7,143	-94.6%
Incentive	33,199	7,794	-76.5%	452	5,758	-92.1%

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 Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
1st timers (%)	26.7	23.8	-3.0	23.1	23.8	-0.7
Repeaters (%)	73.3	76.2	3.0	76.9	76.2	0.7

### U.S. West

U.S. WEST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
1st timers (%)	19.4	16.9	-2.5	16.2	16.9	-0.7
Repeaters (%)	80.6	83.1	2.5	83.8	83.1	0.7

### U.S. East

U.S. EAST MMA (by Air)	2019	2020P 1/	% Change 2020P vs 2019	YTD Feb. 2021P 1/	YTD Feb. 2020P	% change YTD
1st timers (%)	41.5	37.1	-4.5	39.8	36.2	3.6
Repeaters (%)	58.5	62.9	4.5	60.2	63.8	-3.6

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 Feb. 2021P	YTD Feb. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	1,358.25	NA	NA	86.87	247.49	-64.9%

\*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 Feb. 2021P	YTD Feb. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	811.48	NA	NA	57.23	139.44	-59.0%

\*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 Feb. 2021P	YTD Feb. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	546.77	NA	NA	29.65	108.05	-72.6%

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