



# U.S. Fact Sheet

## United States Overview

The Hawai'i Tourism Authority contracted the Hawai'i Visitors and Convention Bureau (HVCB) 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. The Hawai'i Tourism United States (HTUSA) 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. HTUSA 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 November 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$10.76 billion
Primary Purpose of Stay:	Pleasure (5,011,883) vs. MCI (84,509)
Average Length of Stay:	9.44 days
First Time Visitors:	29.6%
Repeat Visitors:	70.4%

## U.S. Total

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
U.S. TOTAL (by Air)							
Visitor Expenditures (\$ Millions)	11,636.2	NA	NA	11,614.9	10,756.8	NA	NA
Visitor Days	61,786,807	21,998,856	-64.4%	60,949,419	54,626,248	19,271,118	183.5%
Arrivals	6,871,839	1,987,326	-71.1%	6,557,214	5,789,438	1,763,421	228.3%
Average Daily Census	169,279	60,106	-64.5%	166,985	163,552	57,526	184.3%
Per Person Per Day Spending (\$)	188.3	NA	NA	190.6	196.9	NA	NA
Per Person Per Trip Spending (\$)	1,693.3	NA	NA	1,771.3	1,858.0	NA	NA
Length of Stay (days)	8.99	11.07	23.1%	9.30	9.44	10.93	-13.7%

NA=Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.  
<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

<sup>1/</sup> 2021 visitor data are preliminary. 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## U.S. West

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1//</sup>	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
U.S. WEST MMA (by Air)							
Visitor Expenditures (\$ Millions)	6,952.0	NA	NA	7,520.6	7,058.2	NA	NA
Visitor Days	39,752,689	13,921,800	-65.0%	40,718,941	36,751,004	12,133,776	202.9%
Arrivals	4,595,319	1,311,176	-71.5%	4,530,046	4,026,938	1,158,901	247.5%
Average Daily Census	108,911	38,038	-65.1%	111,559	110,033	36,220	203.8%
Per Person Per Day Spending (\$)	174.9	NA	NA	184.7	192.1	NA	NA
Per Person Per Trip Spending (\$)	1,512.8	NA	NA	1,660.1	1,752.7	NA	NA
Length of Stay (days)	8.65	10.62	22.7%	8.99	9.13	10.47	-12.8%

NA=Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

<sup>1//</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

## U.S. East

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1//</sup>	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
U.S. EAST MMA (by Air)							
Visitor Expenditures (\$ Millions)	4,684.2	NA	NA	4,094.4	3,698.6	NA	NA
Visitor Days	22,034,119	8,077,056	-63.3%	20,230,478	17,875,243	7,137,343	150.4%
Arrivals	2,276,520	676,150	-70.3%	2,027,168	1,762,499	604,520	191.6%
Average Daily Census	60,367	22,068	-63.4%	55,426	53,519	21,306	151.2%
Per Person Per Day Spending (\$)	212.6	NA	NA	202.4	206.9	NA	NA
Per Person Per Trip Spending (\$)	2,057.6	NA	NA	2,019.8	2,098.5	NA	NA
Length of Stay (days)	9.68	11.95	23.4%	9.98	10.14	11.81	-14.1%

NA=Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

<sup>1//</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

## Contact Information

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## Market Summary

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In November 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

### U.S. West

- Through the first 11 months of 2021, there were 4,026,938 visitors from the U.S. West compared to 1,158,901 visitors (+247.5%) in the first 11 months of 2020, versus 4,176,799 visitors (-3.6%) in the first 11 months of 2019.
- For the first 11 months of 2021, total visitor spending was \$7.06 billion, a 12.9 percent increase from \$6.25 billion in the first 11 months of 2019. Comparative 2020 spending data was not available.
- Through the first 11 months of 2021, there were 40,929 scheduled flights with 8,126,027 seats from the U.S. West. In comparison, there were 16,151 flights with 3,275,599 seats in the first 11 months of 2020, versus 38,843 flights with 7,783,245 seats in the first 11 months of 2019.
- Comparing the first 11 months of 2021 vs. the first 11 months of 2020, there was increased air service from Anchorage (61,068, +100.0%), Denver (334,645 seats, +161.4%), Las Vegas (321,630, +306.6%), Long Beach (208,761, +1,169.6%), Los Angeles (2,233,739, +138.4%), Oakland (492,471, +87.7%), Phoenix (514,643 +244.1%), Portland (292,552, +107.9%), Sacramento (247,552, +142.1%), Salt Lake City (132,594, +204.8%), San Diego (495,405, +282.6%), San Francisco (1,089,443, +85.8%), San Jose (573,788, +286.0%) and Seattle (1,056,798, +102.7%); and new service from Ontario (44,982 seats) and Santa Ana (25,956).
- For all of 2020, arrivals decreased 71.5 percent to 1,311,176 visitors. Visitor days dropped 65.0 percent. The average daily census was 38,038 visitors, down 65.1 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 was 108,911 visitors 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

- Through the first 11 months of 2021, there were 1,762,499 visitors from the U.S. East compared to 604,520 visitors (+191.6%) in the first 11 months of 2020, versus 2,061,163 visitors (-14.5%) in the first 11 months of 2019.
- For the first 11 months of 2021, total visitor spending was \$3.70 billion, a decrease of 11.9 percent from \$4.20 billion in the first 11 months of 2019.

- Through the first 11 months of 2021, there were 4,249 scheduled flights with 1,128,170 seats from the U.S. East. In comparison, there were 1,532 flights with 426,563 seats in the first 11 months of 2020, versus 3,716 flights with 1,065,284 seats in the first 11 months of 2019.
- Comparing the first 11 months of 2021 vs. the first 10 months of 2020, increased service from Atlanta (81,160 seats, +230.7%), Boston (43,646, +157.4%) Chicago (213,109 +120.3%), Dallas (399,569, +124.9%), Houston (77,804, +108.1%), Minneapolis (52,773+185.9%); New York JFK (68,110, +173.6%), Newark (63,711, +201.7%) and Washington D.C. (29,188, +313.3%) and new service from Austin (21,128), Charlotte (53,508) and Orlando (24,464); offset suspended flights from Detroit.
- For all of 2020, arrivals declined 70.3 percent to 676,150 visitors. Visitor days fell 63.3 percent. The average daily census was 22,068 visitors, a decrease of 63.4 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 was 60,367 visitors 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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- COVID variant Omicron has increased economic uncertainty at the end of 2021. The new variant has already had a negative economic impact as international travel gets throttled back in the midst of the usually hectic holiday season.
- Total employment rose by 210,000 in November 2021, and the unemployment rate continued its declining trend, falling by -0.4 percent to 4.2 percent. Notable job gains occurred in professional services, transportation and warehousing, construction and manufacturing.
- The Conference Board Consumer Confidence Index decreased in November 2021, following an increase in October. The Index now stands at 109.5 (1985=100), down from 111.6 in October.
- The Present Situation Index based on consumers' assessment of current business and labor market conditions fell to 142.5 in November 2021 from 145. last month.
- The Expectations Index based on consumers' short-term outlook for income, business and labor market conditions fell to 87.6 in November 2021, from 89.0 last month.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for November 2021-January 2022 will increase by 20.2 percent as compared with the same time period in 2019. 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 for both the U.S. West (+21.7%) and U.S. East (+10.1%). The situation is being monitored and the forecast adjusted accordingly.

## Distribution by Island

### U.S. Total

U.S. TOTAL (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
O'ahu	3,326,507	967,359	-70.9%	2,796,257	861,716	224.5%
Maui County	2,488,629	672,005	-73.0%	2,024,178	584,341	246.4%
Maui	2,449,124	659,185	-73.1%	1,993,268	572,631	248.1%
Moloka'i	42,603	12,231	-71.3%	21,231	11,218	89.3%
Lāna'i	59,810	14,527	-75.7%	40,505	13,318	204.1%
Kaua'i	1,135,672	280,457	-75.3%	690,446	276,887	149.4%
Island of Hawai'i	1,251,171	379,153	-69.7%	1,006,649	332,438	202.8%

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
O'ahu	2,005,506	582,276	-71.0%	1,793,034	517,724	246.3%
Maui County	1,641,441	438,612	-73.3%	1,410,501	376,674	274.5%
Maui	1,616,213	430,261	-73.4%	1,390,062	368,971	276.7%
Moloka'i	25,823	7,423	-71.3%	13,822	6,793	103.5%
Lāna'i	31,672	7,968	-74.8%	23,658	7,339	222.4%
Kaua'i	730,725	179,451	-75.4%	478,884	177,075	170.4%
Island of Hawai'i	786,520	244,963	-68.9%	680,148	212,491	220.1%

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
O'ahu	1,321,001	385,083	-70.8%	1,003,223	343,992	191.6%
Maui County	847,188	233,393	-72.5%	613,677	207,666	195.5%
Maui	832,911	228,925	-72.5%	603,206	203,660	196.2%
Moloka'i	16,780	4,808	-71.3%	7,409	4,425	67.4%
Lāna'i	28,138	6,559	-76.7%	16,846	5,979	181.8%
Kaua'i	404,948	101,006	-75.1%	211,562	99,812	112.0%
Island of Hawai'i	464,651	134,191	-71.1%	326,502	119,947	172.2%

## Airlift: Scheduled Seats

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>US WEST</b>	<b>1,509,348</b>	<b>2,163,031</b>	<b>2,860,044</b>	<b>2,664,628</b>	<b>9,197,051</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>-25.4</b>	<b>752.0</b>	<b>574.6</b>	<b>148.6</b>	<b>143.8</b>
Anchorage	19,716	13,833	11,702	26,233	71,484	29,256	0	0	8,745	38,001	-32.6	NA	NA	200.0	88.1
Denver	52,767	95,755	128,252	108,238	385,012	80,667	507	12,702	57,320	151,196	-34.6	18786.6	909.7	88.8	154.6
Las Vegas	42,256	57,249	138,649	136,454	374,608	69,576	0	0	20,082	89,658	-39.3	NA	NA	579.5	317.8
Long Beach	24,766	64,470	78,876	66,976	235,088	16,443	0	0	3,024	19,467	50.6	NA	NA	2114.8	1107.6
Los Angeles	371,317	594,918	825,750	740,794	2,532,779	556,146	99,818	140,956	267,284	1,064,204	-33.2	496.0	485.8	177.2	138.0
Oakland	109,650	129,029	161,042	151,214	550,935	153,858	32,375	32,200	83,225	301,658	-28.7	298.5	400.1	81.7	82.6
Ontario	2,079	13,986	17,388	17,388	50,841	0	0	0	0	0	NA	NA	NA	NA	NA
Phoenix	90,147	144,673	175,712	177,786	588,318	102,399	0	6,272	69,507	178,178	-12.0	NA	2701.5	155.8	230.2
Portland	71,639	85,864	82,464	89,021	328,988	110,849	0	15,498	31,260	157,607	-35.4	NA	432.1	184.8	108.7
Sacramento	61,405	64,339	75,164	77,614	278,522	71,883	700	11,340	38,269	122,192	-14.6	9091.3	562.8	102.8	127.9
Salt Lake City	38,908	44,565	34,367	27,937	145,777	41,020	0	0	11,526	52,546	-5.1	NA	NA	142.4	177.4
San Diego	73,957	116,653	193,768	175,381	559,759	79,758	0	20,282	56,904	156,944	-7.3	NA	855.4	208.2	256.7
San Francisco	205,670	282,002	400,052	355,852	1,243,576	332,865	55,630	100,571	166,902	655,968	-38.2	406.9	297.8	113.2	89.6
San Jose	126,936	150,880	188,017	172,027	637,860	114,667	525	0	77,245	192,437	10.7	28639.0	NA	122.7	231.5
Santa Ana		6,930	11,592	11,592	30,114		0	0	0	0		NA	NA	NA	NA
Seattle	218,135	297,885	337,249	330,121	1,183,390	263,189	64,318	84,138	180,347	591,992	-17.1	363.1	300.8	83.0	99.9

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of October 20, 2021, subject to change.

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>US EAST</b>	<b>200,235</b>	<b>311,750</b>	<b>410,667</b>	<b>351,437</b>	<b>1,274,089</b>	<b>330,695</b>	<b>8,458</b>	<b>33,315</b>	<b>115,406</b>	<b>487,874</b>	<b>-39.5</b>	<b>3585.9</b>	<b>1132.7</b>	<b>204.5</b>	<b>161.2</b>
Atlanta	15,886	22,203	26,956	24,319	89,364	24,542	0	0	3,164	27,706	-35.3	NA	NA	668.6	222.5
Austin		6,672	9,452	8,340	24,464		0	0	0	0		NA	NA	NA	NA
Boston	6,950	9,730	17,236	17,514	51,430	16,958	0	0	1,112	18,070	-59.0	NA	NA	1475.0	184.6
Charlotte		12,831	25,116	24,570	62,517		0	0	0	0		NA	NA	NA	NA
Chicago	37,735	63,428	84,670	49,694	235,527	74,438	1,284	7,665	30,568	113,955	-49.3	4839.9	1004.6	62.6	106.7
Dallas	97,135	102,464	122,653	125,759	448,011	109,434	6,318	25,650	64,488	205,890	-11.2	1521.8	378.2	95.0	117.6
Detroit	0				0	1758				1758	-100.0				-100.0
Houston	15,194	21,210	25,392	25,392	87,188	32,032	856	0	8,988	41,876	-52.6	NA	NA	182.5	108.2
Minneapolis	13,994	21,199	14,943	10,548	60,684	18,459	0	0	2,486	20,945	-24.2	NA	NA	324.3	189.7
New York JFK	10,008	18,348	24,464	24,186	77,006	24,892	0	0	1,390	26,282	-59.8	NA	NA	1640.0	193.0
Newark	1,665	15,953	30,931	26,589	75,138	21,120	0	0	3,210	24,330	-92.1	NA	NA	728.3	208.8
Orlando	1,668	8,340	9,174	8,618	27,800	0	0	0	0	0	NA	NA	NA	NA	NA
Washington D.C.	0	9,372	19,680	5,908	34,960	7062	0	0	0	7,062	-100.0	NA	NA	NA	395.0

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of October 20, 2021, subject to change.

## Group vs. True Independent; Leisure vs. Business

### U.S. Total

U.S. TOTAL (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	143,078	NA	NA	67,518	NA	NA
True Independent (Net)	5,674,869	NA	NA	4,945,142	NA	NA
Leisure vs business						
Pleasure (Net)	5,720,309	1,526,068	-73.3%	5,011,883	1,354,202	270.1%
MCI (Net)	293,659	93,411	-68.2%	84,509	92,183	-8.3%
Convention/Conf.	171,970	60,311	-64.9%	38,071	59,815	-36.4%
Corp. Meetings	72,478	20,111	-72.3%	24,514	19,712	24.4%
Incentive	59,031	15,943	-73.0%	24,929	15,568	60.1%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	67,037	NA	NA	38,705	NA	NA
True Independent (Net)	3,836,896	NA	NA	3,464,925	NA	NA
Leisure vs business						
Pleasure (Net)	3,885,753	1,020,345	-73.7%	3,525,054	904,317	289.8%
MCI (Net)	154,692	47,963	-69.0%	48,820	47,059	3.7%
Convention/Conf.	91,100	29,958	-67.1%	23,443	29,573	-20.7%
Corp. Meetings	42,499	11,252	-73.5%	14,789	10,971	34.8%
Incentive	25,831	8,142	-68.5%	12,112	7,878	53.7%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	76,041	NA	NA	28,814	NA	NA
True Independent (Net)	1,837,972	NA	NA	1,480,217	NA	NA
Leisure vs business						
Pleasure (Net)	1,834,556	503,113	-72.6%	1,486,829	449,885	230.5%
MCI (Net)	138,967	45,507	-67.3%	35,689	45,124	-20.9%
Convention/Conf.	80,869	30,409	-62.4%	14,628	30,243	-51.6%
Corp. Meetings	29,980	8,866	-70.4%	9,725	8,741	11.3%
Incentive	33,199	7,797	-76.5%	12,818	7,690	66.7%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

## First Timers vs. Repeat Visitors

### U.S. Total

U.S. TOTAL (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
1st timers (%)	26.7	NA	NA	29.6	NA	NA
Repeaters (%)	73.3	NA	NA	70.4	NA	NA

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
1st timers (%)	19.4	NA	NA	21.9	NA	NA
Repeaters (%)	80.6	NA	NA	78.1	NA	NA

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
1st timers (%)	41.5	NA	NA	47.2	NA	NA
Repeaters (%)	58.5	NA	NA	52.8	NA	NA

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

## Tax Revenue

### U.S. Total

U.S. TOTAL (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	1,358.25	NA	NA	1,255.59	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	811.48	NA	NA	823.87	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	546.77	NA	NA	431.72	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).