



# 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. 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 visitors who want to *mālama* (take care of) Hawai'i during their visit, with an emphasis on providing education pre- and post-arrival. HTUSA will promote the Mālama Hawai'i campaign, a partnership with visitor industry partners and volunteer organizations that invites visitors to stay in a regenerative way – to take the time to really know the islands, form a deeper connection with Hawai'i's culture and people, and travel while giving back mindfully. These efforts can also be seen in messaging throughout Hawai'i's airports for how to visit responsibly and respectfully, and even on Social Media platforms and navigation apps, like Waze, for new reservation systems at some of our frequented destinations on-island.

## Year-to-date July 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$9.65 billion
Primary Purpose of Stay:	Pleasure (3,977,273) vs. MCI (157,465)
Average Length of Stay:	9.08 days
First Time Visitors:	28.0%
Repeat Visitors:	72.0%

## U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
Visitor Expenditures (\$ Millions)	11,636.2	NA	12,317.9	13,988.8	9,652.5	6,392.1	51.0%
Visitor Days	61,786,807	21,998,856	61,249,728	69,490,874	42,340,875	34,291,986	23.5%
Arrivals	6,871,839	1,987,326	6,468,899	7,666,485	4,665,415	3,527,864	32.2%
Average Daily Census	169,279	60,106	167,807	190,386	199,721	161,755	23.5%
Per Person Per Day Spending (\$)	188.3	NA	201.1	201.3	228.0	186.4	22.3%
Per Person Per Trip Spending (\$)	1,693.3	NA	1,904.2	1,824.7	2,068.9	1,811.9	14.2%
Length of Stay (days)	8.99	11.07	9.47	9.06	9.08	9.72	-6.6%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.  
 \*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

<sup>1/</sup> 2022 visitor data are preliminary. 2021, 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
Visitor Expenditures (\$ Millions)	6,952.0	NA	7,994.4	8,781.5	5,900.0	4,181.9	41.1%
Visitor Days	39,752,689	13,921,800	40,900,008	45,239,109	27,248,013	23,001,638	18.5%
Arrivals	4,595,319	1,311,176	4,473,588	5,183,426	3,151,554	2,444,150	28.9%
Average Daily Census	108,911	38,038	112,055	123,943	128,528	108,498	18.5%
Per Person Per Day Spending (\$)	174.9	NA	195.5	194.1	216.5	181.8	19.1%
Per Person Per Trip Spending (\$)	1,512.8	NA	1,787.0	1,694.1	1,872.1	1,711.0	9.4%
Length of Stay (days)	8.65	10.62	9.14	8.73	8.65	9.41	-8.1%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.  
\*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

## U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
Visitor Expenditures (\$ Millions)	4,684.2	NA	4,323.5	5,207.4	3,752.5	2,210.2	69.8%
Visitor Days	22,034,119	8,077,056	20,349,720	24,251,765	15,092,862	11,290,347	33.7%
Arrivals	2,276,520	676,150	1,995,311	2,483,059	1,513,861	1,083,714	39.7%
Average Daily Census	60,367	22,068	55,753	66,443	71,193	53,256	33.7%
Per Person Per Day Spending (\$)	212.6	NA	212.5	214.7	248.6	195.8	27.0%
Per Person Per Trip Spending (\$)	2,057.6	NA	2,166.8	2,097.2	2,478.8	2,039.5	21.5%
Length of Stay (days)	9.68	11.95	10.20	9.77	9.97	10.42	-4.3%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.  
\*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

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## Market Summary

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Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or had a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In July 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

### U.S. West

- Through the first seven months of 2022 there were 3,151,554 visitors from the U.S. West compared to 2,720,989 visitors (+15.8%) in the first seven months of 2019.
- U.S. West visitors spent \$5.90 billion in the first seven months of 2022 compared to \$4.11 billion (+43.7%) in the first seven months of 2019.
- There were 29,785 scheduled flights with 5,928,880 seats in the first seven months of 2022, compared to 24,924 flights with 4,998,109 seats in the first seven months of 2019.
- For all of 2021, there were 4,473,588 visitors from the U.S. West compared to 1,311,176 visitors (+241.2%) in 2020, and 4,595,319 visitors (-2.6%) in 2019.
- Total visitor spending in 2021 was \$7.99 billion, an increase of 15 percent from \$6.95 billion in 2019. Comparative annual 2020 spending data was not available.
- In 2021, there were 45,246 scheduled flights with 8,989,207 seats from the U.S. West. In comparison, there were 18,601 flights with 3,772,048 seats in 2020, and 42,760 flights with 8,564,295 seats in 2019.

### U.S. East

- Through the first seven months of 2022, 1,513,861 visitors arrived from the U.S. East, compared to 1,429,858 visitors (+5.9%) in the first seven months of 2019.
- U.S. East visitors spent \$3.75 billion in the first seven months of 2022 compared to \$2.92 billion (+28.5%) in the first seven months of 2019.
- There were 2,692 scheduled flights with 741,790 seats in the first seven months of 2022, compared to 2,515 flights with 721,876 seats in the first seven months of 2019.
- In 2021, there were 1,995,311 visitors from the U.S. East compared to 676,150 visitors (+195.1%) in 2020, and 2,276,520 visitors (-12.4%) in 2019.
- Total visitor spending in 2021 was \$4.32 billion, a decrease of 7.7 percent from \$4.68 billion in 2019.
- In 2021, there were 4,696 scheduled flights with 1,249,514 seats from the U.S. East. In comparison, there were 1,775 flights with 487,874 seats in 2020, and 4,129 flights with 1,182,495 seats in 2019.

## Market Conditions

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- According to the latest Destination Analysts tracking study, American travelers' minds are focused on financial-related matters. When asked what has deterred them from traveling more than they would have otherwise preferred in the past six months, the top reasons are gas is too expensive (47%), the general cost of travel being too expensive right now (39%), personal financial reasons (31%) and airfare is too expensive (27%). In comparison, COVID concern is the fifth most commonly reported travel deterrent, with 24.5 percent saying the risk of contracting COVID kept them from traveling more. The proportion of travelers who feel that the present is a good time to spend money on travel has dropped to 28 percent, the lowest level recorded so far this year. Overall, American travelers' optimism about the financial future is dimming somewhat, as the proportion of travelers who feel they will be financially better off next year compared to this year has declined 4-points in the last month to 39 percent.
- From the Airline Seat Capacity Outlook for August 2022-October 2022 (updated Aug. 2, DIIOMi flight schedules), the forecast for domestic scheduled nonstop air seats to Hawai'i during this period will decrease 11.3 percent compared to the same period in 2021. The constant fluidity of seats and flights will continue as Hawai'i emerges from the COVID-19 pandemic. A decrease in flights is expected from U.S. West (-10.1%) as well as from the U.S. East (-20.5%). Schedules are continuously monitored, and the forecast adjusted accordingly.
- Consumer confidence fell for a third consecutive month in July 2022, according to the Conference Board. The decrease was driven by a decline in the Present Situation Index—a sign growth has slowed at the start of Quarter 3. The Expectations Index held relatively steady, but remained well below a reading of 80, suggesting recession risks persist. Concerns about inflation—rising gas and food prices, in particular—continued to weigh on consumers.
- Wholesale Partner continues to see an overall slowdown in bookings to Hawai'i.
  - Hawai'i package costs are at an all-time high, making the destination uncompetitive vs. others such as Mexico, Caribbean, Europe, etc.
  - Domestic travel continues to slow as they see more travelers booking international itineraries, leveling the overall demand for domestic travel compared to 2021 and 2022.
  - As of July 31, they report that booking pace for 2023 compared to 2022 is down for the state by -28 percent; O'ahu down -18 percent; Maui down -32 percent; Kaua'i down -36 percent, and the island of Hawai'i down -40 percent.
- Airline Wholesaler – Hawai'i's pace for the remainder of 2022 is still up compared to 2019, but only in the single digit. In June 2022 it was in the low 10 percentage points.
  - Hawai'i bookings are experiencing a slow-down. Talks of a recession are most likely having a negative impact on the destination with the highest ADR. Constant news of cancelled or delayed flights may also be deterring customers from booking a Hawai'i vacation package.
  - For 2022, O'ahu has benefited from the higher room costs on the neighbor islands as well as the absence of the Japanese market thus providing plenty of inventory for the domestic wholesaler.
  - For 2023, hotels are betting on the return of Japan. At this time, this wholesaler is not seeing one island performing better than the others. With room night production down strong double-digits year-over-year, the wholesaler believes it will be difficult to turn it around. A clearer vision for 2023 is hoped for by Quarter 4 2022. As of July 2022, Hawai'i is pacing way behind 2022 for 2023. Up until then, customers were booking 2022 travel with a 6-month advance booking window with an unprecedented gusto, redeeming travel

vouchers from 2020 and 2021. This, in combination with increased personal savings, allowed them to splurge on their dream vacation to Hawai'i. It is now assumed that most of these travel vouchers have been used, and with talk of recession and the 2023 Hawai'i ADR up 20+ percent year-over-year, it is understandable that people will wait to book.

## Distribution by Island

### U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	3,326,507	967,359	3,142,030	2,291,429	1,707,994	34.2%
Maui County	2,488,629	672,005	2,239,395	1,538,129	1,258,630	22.2%
Maui	2,449,124	659,185	2,204,165	1,512,782	1,240,550	21.9%
Moloka'i	42,603	12,231	24,316	20,588	13,033	58.0%
Lāna'i	59,810	14,527	45,369	32,948	23,204	42.0%
Kaua'i	1,135,672	280,457	785,082	714,985	353,690	102.2%
Island of Hawai'i	1,251,171	379,153	1,137,156	874,412	619,300	41.2%

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	2,005,506	582,276	2,005,024	1,441,553	1,085,938	32.7%
Maui County	1,641,441	438,612	1,546,151	999,041	883,706	13.1%
Maui	1,616,213	430,261	1,523,024	982,478	871,609	12.7%
Moloka'i	25,823	7,423	15,779	13,160	8,466	55.4%
Lāna'i	31,672	7,968	26,221	18,469	13,918	32.7%
Kaua'i	730,725	179,451	540,578	475,239	244,070	94.7%
Island of Hawai'i	786,520	244,963	763,139	559,671	421,800	32.7%

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	1,321,001	385,083	1,137,006	849,877	622,057	36.6%
Maui County	847,188	233,393	693,244	539,089	374,924	43.8%
Maui	832,911	228,925	681,140	530,303	368,941	43.7%
Moloka'i	16,780	4,808	8,536	7,428	4,567	62.6%
Lāna'i	28,138	6,559	19,148	14,479	9,286	55.9%
Kaua'i	404,948	101,006	244,504	239,746	109,621	118.7%
Island of Hawai'i	464,651	134,191	374,017	314,741	197,500	59.4%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>US WEST</b>	<b>2,468,737</b>	<b>2,554,251</b>	<b>2,565,873</b>	<b>2,386,254</b>	<b>9,975,115</b>	<b>1,509,348</b>	<b>2,163,031</b>	<b>2,773,109</b>	<b>2,543,719</b>	<b>8,989,207</b>	<b>63.6</b>	<b>18.1</b>	<b>-7.5</b>	<b>-6.2</b>	<b>11.0</b>
Anchorage	29,271	10,815	0	8,586	48,672	19,716	13,833	11,702	24,980	70,231	48.5	-21.8	-100.0	-65.6	-30.7
Denver	94,617	81,399	93,197	104,351	373,564	52,767	95,755	119,828	101,625	369,975	79.3	-15.0	-22.2	2.7	1.0
Las Vegas	147,663	144,026	171,124	147,396	610,209	42,256	57,249	134,376	130,246	364,127	249.4	151.6	27.3	13.2	67.6
Long Beach	65,331	65,681	62,601	50,876	244,489	24,766	64,470	77,273	63,364	229,873	163.8	1.9	-19.0	-19.7	6.4
Los Angeles	668,218	701,930	718,139	643,537	2,731,824	371,317	594,918	803,612	710,296	2,480,143	80.0	18.0	-10.6	-9.4	10.1
Oakland	154,952	160,601	156,135	148,764	620,452	109,650	129,029	157,514	144,165	540,358	41.3	24.5	-0.9	3.2	14.8
Ontario	16,821	17,199	17,388	17,388	68,796	2,079	13,986	17,388	17,199	50,652	709.1	23.0	0.0	1.1	35.8
Phoenix	173,150	163,155	152,248	164,290	652,843	90,147	144,673	172,296	171,235	578,351	92.1	12.8	-11.6	-4.1	12.9
Portland	92,407	92,572	70,968	79,893	335,840	71,639	85,864	78,517	84,853	320,873	29.0	7.8	-9.6	-5.8	4.7
Sacramento	78,066	88,289	73,251	52,276	291,882	61,405	64,339	73,269	72,326	271,339	27.1	37.2	0.0	-27.7	7.6
Salt Lake City	45,969	29,047	22,621	24,182	121,819	38,908	44,565	33,431	27,259	144,163	18.1	-34.8	-32.3	-11.3	-15.5
San Diego	156,957	154,534	133,752	131,253	576,496	73,957	116,653	188,167	167,044	545,821	112.2	32.5	-28.9	-21.4	5.6
San Francisco	310,947	364,498	402,654	342,735	1,420,834	205,670	282,002	382,039	340,793	1,210,504	51.2	29.3	5.4	0.6	17.4
San Jose	132,756	177,639	188,800	176,334	675,529	126,936	150,880	185,192	164,354	627,362	4.6	17.7	1.9	7.3	7.7
Santa Ana	11,088	11,466	8,820	3,528	34,902	0	6,930	11,592	11,214	29,736	NA	65.5	-23.9	-68.5	17.4
Seattle	290,524	291,400	294,175	290,865	1,166,964	218,135	297,885	326,913	312,766	1,155,699	33.2	-2.2	-10.0	-7.0	1.0

Source: HTA/DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of June 24, 2022 subject to change.



## U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	67,037	NA	43,863	44,922	20,252	121.8%
True Independent (Net)	3,836,896	NA	3,856,005	2,708,619	2,115,070	28.1%
Leisure vs business						
Pleasure (Net)	3,885,753	1,022,954	3,903,665	2,723,352	2,154,170	26.4%
MCI (Net)	154,692	47,904	52,735	80,384	20,026	301.4%
Convention/Conf.	91,100	29,902	25,344	43,919	8,991	388.5%
Corp. Meetings	42,499	11,246	16,185	21,095	6,371	231.1%
Incentive	25,831	8,146	12,917	17,945	5,239	242.5%

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	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	76,041	NA	35,426	45,921	14,281	221.5%
True Independent (Net)	1,837,972	NA	1,679,991	1,257,530	919,213	36.8%
Leisure vs business						
Pleasure (Net)	1,834,556	503,113	1,678,144	1,253,921	919,554	36.4%
MCI (Net)	138,967	45,507	39,120	77,081	13,509	470.6%
Convention/Conf.	80,869	30,409	16,246	39,026	5,824	570.1%
Corp. Meetings	29,980	8,866	10,770	18,693	3,611	417.7%
Incentive	33,199	7,797	13,776	22,849	4,518	405.7%

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	2021	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	26.7	NA	29.1	28.0	29.1	-1.1
Repeaters (%)	73.3	NA	70.9	72.0	70.9	1.1

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	19.4	NA	21.5	20.8	21.2	-0.4
Repeaters (%)	80.6	NA	78.5	79.2	78.8	0.4

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	41.5	NA	46.2	42.9	46.8	-3.9
Repeaters (%)	58.5	NA	53.8	57.1	53.2	3.9

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

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### U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	1,358.25	NA	1,437.81	1,119.69	746.12	50.1%

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

### U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021P	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	811.48	NA	933.16	684.39	488.14	40.2%

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

### U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	546.77	NA	504.66	435.29	257.99	68.7%

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