



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 November 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (1,352,561) vs. MCI (92,240)
Average Length of Stay:	10.92 days
First Time Visitors:	23.8%
Repeat Visitors:	76.2%

U.S. Total

U.S. TOTAL (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
Visitor Expenditures* (\$ Millions)	11,118.3	11,636.2	4.7%	NA	NA	NA	10,450.3	NA
Visitor Days	59,030,584	61,786,807	4.7%	NA	NA	19,211,506	55,670,793	-65.5%
Arrivals	6,377,352	6,871,839	7.8%	NA	NA	1,758,924	6,237,962	-71.8%
Average Daily Census	161,728	169,279	4.7%	NA	NA	57,348	166,679	-65.6%
Per Person Per Day Spending* (\$)	188.3	188.3	0.0%	NA	NA	NA	187.7	NA
Per Person Per Trip Spending* (\$)	1,743.4	1,693.3	-2.9%	NA	NA	NA	1,675.3	NA
Length of Stay (days)	9.26	8.99	-2.9%	NA	NA	10.92	8.92	22.4%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

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 Nov. 2020P	YTD Nov. 2019	% change YTD
U.S. WEST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	6,588.4	6,952.0	5.5%	NA	NA	NA	6,254.4	NA
Visitor Days	37,477,016	39,752,689	6.1%	NA	NA	12,089,045	35,881,849	-66.3%
Arrivals	4,203,894	4,595,319	9.3%	NA	NA	1,154,401	4,176,799	-72.4%
Average Daily Census	102,677	108,911	6.1%	NA	NA	36,087	107,431	-66.4%
Per Person Per Day Spending* (\$)	175.8	174.9	-0.5%	NA	NA	NA	174.3	NA
Per Person Per Trip Spending* (\$)	1,567.2	1,512.8	-3.5%	NA	NA	NA	1,497.4	NA
Length of Stay (days)	8.91	8.65	-3.0%	NA	NA	10.47	8.59	21.9%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

U.S. East

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
U.S. EAST MMA (by Air)								
Visitor Expenditures* (\$ Millions)	4,529.9	4,684.2	3.4%	NA	NA	NA	4,195.9	NA
Visitor Days	21,553,568	22,034,119	2.2%	NA	NA	7,122,461	19,788,945	-64.0%
Arrivals	2,173,458	2,276,520	4.7%	NA	NA	604,524	2,061,163	-70.7%
Average Daily Census	59,051	60,367	2.2%	NA	NA	21,261	59,248	-64.1%
Per Person Per Day Spending* (\$)	210.2	212.6	1.2%	NA	NA	NA	212.0	NA
Per Person Per Trip Spending* (\$)	2,084.2	2,057.6	-1.3%	NA	NA	NA	2,035.7	NA
Length of Stay (days)	9.92	9.68	-2.4%	NA	NA	11.78	9.60	22.7%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

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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. A new policy went into effect on November 24 requiring all trans-Pacific travelers participating in the pre-travel testing program to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrives in the state. Kaua'i, Hawai'i Island, Maui, and Moloka'i also had a partial quarantine in place in November. Lāna'i residents and visitors were under a stay-at-home order from October 27 to November 11. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "No Sail Order" on all cruise ships.

For California, a limited stay at home order was in effect on Nov. 21 due to a resurgence of COVID-19 cases. California residents returning home were advised to self-quarantine for 14 days. Oregon was in a statewide two-week freeze from November 18 to December 2, with risk reduction measures limiting gatherings, limiting operations of retail and dining establishments, closing gyms and recreation activities, and requiring most businesses to mandate work-from-home for their employees. For Washington, a travel advisory was issued asking residents to stay close to home, and a 14-day quarantine was recommended for returning residents. In New York, returning residents had to obtain a COVID test within three days of departure and must quarantine for three days. On day four of their quarantine, the traveler must obtain another COVID test. If both tests came back negative, the traveler may exit quarantine early upon receipt of the second negative diagnostic test.

In November 2020, 137,452 visitors arrived from U.S. West compared to 375,244 a year ago. U.S. West visitors spent \$251.9 million (-55.3%) in November 2020, and their average daily spending was \$156 per person (-12.8%). There were 40,205 visitors from U.S. East, compared to 150,386 in November 2019. U.S. East visitors spent \$86.5 million (-71.8%) in November 2020 and \$160 per person on an average daily basis.

U.S. West

- Through the first 11 months of 2020, arrivals decreased 72.4 percent to 1,154,401 visitors. Visitor days dropped 66.3 percent. The average daily census showed 36,087 visitors per day, down 66.4 percent compared to the first 11 months of 2019.
- Scheduled air seats for the first 11 months of 2020 fell 57.9 percent compared to a year ago, due to reduced service from Denver (-62.3%), Las Vegas (-67.9%), Long Beach (-74.0%), Los Angeles (-61.4%), Phoenix (-63.7%), Portland (-62.0%), San Diego (-60.6%), San Francisco (-57.3%) and Seattle (-45.9%).
- 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

- Through the first 11 months of 2020, arrivals declined 70.7 percent to 604,524 visitors. Visitor days fell 64.0 percent. The average daily census showed 21,261 visitors per day, a decrease of 64.1 percent compared to year-to-date 2019.
- Scheduled air seats declined 60.0 percent for the first 11 months of 2020 as a result of reduced service from Atlanta (-71.2%), Boston (-67.4%), Chicago (-51.8%), Dallas (-47.2%), Houston (-69.3%), Minneapolis (-63.6%), Newark (-73.7%), New York JFK (-73.3%) and Washington D.C. (-79.6%).
- 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

- According to the Congressional Budget Office's economic projections, real GDP will contract by 5.6 percent in 2020.
- U.S. economic data released over the last week was generally favorable and consistent with the November forecast of positive, but significantly reduced GDP growth in the fourth quarter after the record-setting rebound in the third quarter.
- The unemployment rate in October fell to 6.9 percent.
- The Conference Board Consumer Confidence Index declined slightly in November, after remaining relatively flat in October. The Index now stands at 96.1 (1985=100), down from 101.4 (an upward revision) in October.
- The Present Situation Index based on consumers' assessment of current business and labor market conditions decreased slightly from 106.2 to 105.9.
- The Expectations Index based on consumers' short-term outlook for income, business, and labor market conditions declined from 98.2 in October to 89.5 this month.
- The World Travel & Tourism Council (WTTC) has an in-depth data dashboard highlighting the recovery of travel demand across flights and hotels, as well as revealing the shifting intentions of travelers through online travel searches. This interactive COVID-19 Travel Demand Recovery Dashboard was developed by WTTC and represents the global travel and tourism private sector, with support from McKinsey & Company. This tool provides easy access to qualitative and quantitative travel data at the global and regional level as well as for 33 major countries around the world, by revealing travel demand since the beginning of the year and is updated bi-weekly.
- All of the major U.S. wholesalers reported that since the start of Hawai'i's pre-travel COVID-19 testing program, bookings have increased with most for mid to late 2021. They 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.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for December 2020-February 2021 will decrease by -18.7 percent as compared with the same time period of 2019. The

projection is based on flights appearing in Dii 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 (-16.6%) and U.S. East (-32.1%). 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 Nov. 2020P	YTD Nov. 2019	% change YTD
O'ahu	3,043,894	3,326,507	9.3%	857,339	3,017,663	-71.6%
Maui County	2,315,314	2,488,629	7.5%	584,553	2,263,370	-74.2%
Maui	2,277,080	2,449,124	7.6%	572,857	2,228,499	-74.3%
Moloka'i	41,167	42,603	3.5%	11,198	38,097	-70.6%
Lāna'i	55,484	59,810	7.8%	13,310	54,076	-75.4%
Kaua'i	1,134,420	1,135,672	0.1%	277,297	1,032,602	-73.1%
Island of Hawai'i	1,183,715	1,251,171	5.7%	332,388	1,123,848	-70.4%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
O'ahu	1,795,039	2,005,506	11.7%	513,441	1,821,496	-71.8%
Maui County	1,501,888	1,641,441	9.3%	376,775	1,495,759	-74.8%
Maui	1,477,805	1,616,213	9.4%	369,080	1,473,538	-75.0%
Moloka'i	24,176	25,823	6.8%	6,779	23,014	-70.5%
Lāna'i	28,258	31,672	12.1%	7,335	28,604	-74.4%
Kaua'i	719,930	730,725	1.5%	177,358	665,113	-73.3%
Island of Hawai'i	729,244	786,520	7.9%	212,506	706,341	-69.9%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
O'ahu	1,248,855	1,321,001	5.8%	343,898	1,196,168	-71.2%
Maui County	813,426	847,188	4.2%	207,778	767,611	-72.9%
Maui	799,275	832,911	4.2%	203,776	754,961	-73.0%
Moloka'i	16,991	16,780	-1.2%	4,420	15,083	-70.7%
Lāna'i	27,226	28,138	3.3%	5,975	25,472	-76.5%
Kaua'i	414,489	404,948	-2.3%	99,939	367,489	-72.8%
Island of Hawai'i	454,472	464,651	2.2%	119,882	417,507	-71.3%

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	0	0	11,448	100.0	100.0	0	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	0	6,272	72,231	180,902	115,694	105,113	120,802	104,074	445,683	-11.5	0	-94.8	-30.6	-59.4
Portland	110,849	0	15,498	33,675	160,022	119,435	110,374	79,532	99,994	409,335	-7.2	0	-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	0	0	12,656	53,676	39,816	17,998	17,168	24,069	99,051	3.0	0	0	-47.4	-45.8
San Diego	79,758	0	20,282	58,952	158,992	85,914	89,879	94,264	90,556	360,613	-7.2	0	-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	0	85,775	200,967	74,158	103,154	115,532	112,798	405,642	54.6	-99.5	0	-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
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	0	0	3,164	27,706	26,954	22,386	22,112	21,894	93,346	-8.9	0	0	-85.5	-70.3
Boston	16,958	0	0	1,112	18,070	0	18,904	21,128	18,348	58,380	NA	0	0	-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 Nov. 2020P1/	YTD Nov. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	136,310	143,078	5.0%	34,242	134,008	-74.4%
True Independent (Net)	5,233,615	5,674,869	8.4%	1,532,998	5,128,385	-70.1%
Leisure vs business						
Pleasure (Net)	5,277,345	5,720,309	8.4%	1,352,561	5,190,321	-73.9%
MCI (Net)	293,911	293,659	-0.1%	92,240	280,662	-67.1%
Convention/Conf.	184,569	171,970	-6.8%	59,873	164,683	-63.6%
Corp. Meetings	67,184	72,478	7.9%	19,717	68,296	-71.1%
Incentive	52,022	59,031	13.5%	15,561	57,163	-72.8%

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P1/	YTD Nov. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	62,925	67,037	6.5%	15,288	62,396	-75.5%
True Independent (Net)	3,493,923	3,836,896	9.8%	1,023,806	3,474,154	-70.5%
Leisure vs business						
Pleasure (Net)	3,524,847	3,885,753	10.2%	901,975	3,531,775	-74.5%
MCI (Net)	156,181	154,692	-1.0%	47,119	147,180	-68.0%
Convention/Conf.	96,954	91,100	-6.0%	29,629	86,988	-65.9%
Corp. Meetings	39,528	42,499	7.5%	10,978	39,887	-72.5%
Incentive	24,371	25,831	6.0%	7,874	24,852	-68.3%

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P1/	YTD Nov. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	73,384	76,041	3.6%	18,954	71,612	-73.5%
True Independent (Net)	1,739,692	1,837,972	5.6%	509,192	1,654,231	-69.2%
Leisure vs business						
Pleasure (Net)	1,752,498	1,834,556	4.7%	450,586	1,658,546	-72.8%
MCI (Net)	137,730	138,967	0.9%	45,121	133,482	-66.2%
Convention/Conf.	87,615	80,869	-7.7%	30,244	77,695	-61.1%
Corp. Meetings	27,655	29,980	8.4%	8,739	28,409	-69.2%
Incentive	27,651	33,199	20.1%	7,687	32,310	-76.2%

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 Nov. 2020P1/	YTD Nov. 2019	% change YTD
1st timers (%)	26.7	26.7	0.0	23.8	27.1	-3.2
Repeaters (%)	73.3	73.3	0.0	76.2	72.9	3.2

U.S. West

U.S. WEST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P1/	YTD Nov. 2019	% change YTD
1st timers (%)	19.0	19.4	0.4	17.0	19.7	-2.7
Repeaters (%)	81.0	80.6	-0.4	83.0	80.3	2.7

U.S. East

U.S. EAST MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P1/	YTD Nov. 2019	% change YTD
1st timers (%)	41.5	41.5	0.0	36.9	42.1	-5.2
Repeaters (%)	58.5	58.5	0.0	63.1	57.9	5.2

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 Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	1,297.79	1,358.25	4.7%	NA	1,219.81	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 Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	769.04	811.48	5.5%	NA	730.05	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 Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	528.76	546.77	3.4%	NA	489.77	NA

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