



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 March 2021 Quick Facts^{1/}

Visitor Expenditures:	\$1.49 billion
Primary Purpose of Stay:	Pleasure (689,367) vs. MCI (6,728)
Average Length of Stay:	10.81 days
First Time Visitors:	24.6%
Repeat Visitors:	75.4%

U.S. Total

U.S. TOTAL (by Air)	2019	2020P	% Change 2020P vs 2019	2021 Annual Forecast ^{2/}	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
Visitor Expenditures (\$ Millions) *	11,636.2	3,456.8*	NA	7,833.4	1,486.5	2,667.6	-44.3%
Visitor Days	61,786,807	21,935,014	-64.5%	42,553,079	8,872,874	13,478,807	-34.2%
Arrivals	6,871,839	1,982,449	-71.2%	4,403,876	820,847	1,423,192	-42.3%
Average Daily Census	169,279	59,932	-64.6%	116,265	98,587	148,119	-33.4%
Per Person Per Day Spending (\$) *	188.3	188.3*	NA	184.1	167.5	197.9	-15.4%
Per Person Per Trip Spending (\$) *	1,693.3	1,894.8*	NA	1,778.7	1,810.9	1,874.4	-3.4%
Length of Stay (days)	8.99	11.06	23.1%	9.66	10.81	9.47	14.1%

^{1/} 2020 visitor spending data were only available for January – March, November and December 2020. Data for other months were not available due to limited samples.

^{2/} Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

U.S. West

	2019	2020P	% Change 2020P vs 2019	2021 Annual Forecast ^{2/}	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
U.S. WEST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	6,952.0	2,043.7*	NA	4,850.7	982.6	1,511.4	-35.0%
Visitor Days	39,752,689	13,873,947	-65.1%	28,031,536	5,963,340	8,173,302	-27.0%
Arrivals	4,595,319	1,306,388	-71.6%	3,002,696	572,998	908,883	-37.0%
Average Daily Census	108,911	37,907	-65.2%	76,799	66,259	89,817	-26.2%
Per Person Per Day Spending (\$) *	174.9	176.5*	NA	173.0	164.8	184.9	-10.9%
Per Person Per Trip Spending (\$) *	1,512.8	1,705.5*	NA	1,615.5	1,714.9	1,662.9	3.1%
Length of Stay (days)	8.65	10.62	22.8%	9.34	10.41	8.99	15.7%

* 2020 visitor spending data were only available for January – March, November and December 2020. Data for other months were not available due to limited samples.

^{2/}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 ^{2/}	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
U.S. EAST MMA (by Air)							
Visitor Expenditures* (\$ Millions)	4,684.2	1,413.1*	NA	2,982.6	503.8	1,156.3	-56.4%
Visitor Days	22,034,119	8,061,068	-63.4%	14,521,543	2,909,534	5,305,505	-45.2%
Arrivals	2,276,520	676,061	-70.3%	1,401,180	247,849	514,309	-51.8%
Average Daily Census	60,367	22,025	-63.5%	39,785	32,328	58,302	-44.6%
Per Person Per Day Spending (\$) *	212.6	208.2*	NA	205.4	173.2	217.9	-20.5%
Per Person Per Trip Spending (\$) *	2,057.6	2,257.2*	NA	2,128.7	2,032.7	2,248.2	-9.6%
Length of Stay (days)	9.68	11.92	23.2%	10.36	11.74	10.32	13.8%

* 2020 visitor spending data were only available for January – March, November and December 2020. Data for other months were not available due to limited samples.

^{2/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

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Market Summary

During March 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 state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kaua'i to quarantine upon arrival except for those 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 March. 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 March 2021. California residents were advised to quarantine for 10 days after re-entering their state. In Oregon, returning residents were advised to self-quarantine for 14 days after their return. Quarantine recommendations did not apply to returning residents who were fully vaccinated for COVID-19 and had no COVID-19 symptoms. In Washington, all air passengers were required to obtain a negative viral COVID-19 test within 3 days of departure. In addition, returning Washington residents were directed to self-quarantine for 14 days after out-of-state 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 the fourth day of their quarantine, a second COVID-19 test was required. If both tests came back negative, they could exit quarantine early upon receipt of the second negative test.

U.S. West

- In the first quarter of 2021, U.S. West visitors spent \$982.6 million (-35.0%), and their average daily spending was \$165 per person (-10.9%). A total of 572,998 visitors were from U.S. West compared to 908,883 visitors in the same period last year. The average daily census showed 66,259 visitors per day compared to 89,817 visitor per day in the first quarter of 2020.
- In the first quarter of 2021, there were 7,581 (-24.5%) scheduled flights with 1,509,348 (-25.4%) seats. Reduced service from Anchorage (19,716 seats, -32.6%), Denver (52,767, -34.6%), Las Vegas (42,256, -39.3%), Los Angeles (371,317, -33.2%), Oakland (109,650, -28.7%), Phoenix (90,147, -12.0%), Portland (71,639, -35.4%), Sacramento (61,405, -14.6%), Salt Lake City (38,908, -5.1%), San Diego (73,957, -7.3%), San Francisco (205,670, -38.2%), and Seattle (218,135, -17.1%) offset increased service from Long Beach (24,766, +50.6%) and new service from Ontario California (2,079 seats).
- 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 quarter of 2021, U.S. East visitors spent \$503.8 million (-56.4%), and their average daily spending was \$173 per person (-20.5%). A total of 247,849 visitors came from U.S. East compared to 514,309 visitors in the same period last year. The average daily census showed 32,328 visitors per day compared to 58,302 visitor period in the first quarter of 2020.
- In the first quarter of 2021, there were 795 (-31.4%) scheduled flights from U.S. East, with 200,235 (-39.5%) seats. Flights from Detroit and Washington, D.C. were suspended, while reduced air service from Atlanta (15,886 seats, -35.3%), Boston (6,950, -59.0%), Chicago (37,735, -49.3%), Dallas (97,135, -11.2%), Houston (15,194, -52.6%), Minneapolis (13,994, -24.2%), New York (JFK) (10,008, -59.8%), and Newark (1,665, -92.1%) offset new service from Orlando Florida (1,668).
- 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

- The number of positive forces acting on the U.S. economy is unprecedented with fiscal stimulus, monetary policy, state re-openings and vaccine distribution all playing a role. The unemployment rate dropped to 6.0 percent.
- The Conference Board Consumer Confidence Index surged in March to its highest reading in a year after a modest increase in February. The Index now stands at 109.7 (1985=100), up from 90.4 in February. The Present Situation Index based on consumers' assessment of current business and labor market conditions climbed from 89.6 to 110.0. The Expectations Index based on consumers' short-term outlook for income, business and labor market conditions also improved from 90.9 in February to 109.6 in March.
- Major U.S. wholesalers' focus continues to be Hawai'i's safety and protocol guide, travel insurance/protection, and travel advisor educational messaging.
- Wholesale partners are seeing positive trends and increased demand in week-over-week bookings. All are seeing sustained strength and the largest total booking pace since pre-pandemic levels. Demand for Kaua'i is cautiously optimistic due to its reentry into the Safe Travels Hawai'i program on April 5, 2021.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for April - June 2021 will increase by +882.0 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 (+787.0%) and U.S. East (+710.1%). 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 Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	3,326,507	963,021	-71.1%	375,511	691,519	-45.7%
Maui County	2,488,629	671,779	-73.0%	326,812	487,739	-33.0%
Maui	2,449,124	658,972	-73.1%	322,495	478,014	-32.5%
Moloka'i	42,603	12,210	-71.3%	3,370	9,651	-65.1%
Lāna'i	59,810	14,517	-75.7%	4,986	11,529	-56.8%
Kaua'i	1,135,672	280,866	-75.3%	25,676	233,054	-89.0%
Island of Hawai'i	1,251,171	379,096	-69.7%	159,565	280,631	-43.1%

U.S. West

U.S. WEST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	2,005,506	578,019	-71.2%	240,617	403,584	-40.4%
Maui County	1,641,441	438,390	-73.3%	236,075	301,076	-21.6%
Maui	1,616,213	430,048	-73.4%	233,167	294,841	-20.9%
Moloka'i	25,823	7,408	-71.3%	2,255	5,719	-60.6%
Lāna'i	31,672	7,962	-74.9%	3,075	6,119	-49.7%
Kaua'i	730,725	179,734	-75.4%	16,205	142,420	-88.6%
Island of Hawai'i	786,520	244,973	-68.9%	113,834	173,222	-34.3%

U.S. East

U.S. EAST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	1,321,001	385,002	-70.9%	134,894	287,934	-53.2%
Maui County	847,188	233,389	-72.5%	90,736	186,662	-51.4%
Maui	832,911	228,924	-72.5%	89,328	183,173	-51.2%
Moloka'i	16,780	4,802	-71.4%	1,115	3,932	-71.6%
Lāna'i	28,138	6,554	-76.7%	1,911	5,409	-64.7%
Kaua'i	404,948	101,132	-75.0%	9,471	90,634	-89.5%
Island of Hawai'i	464,651	134,123	-71.1%	45,732	107,409	-57.4%

Airlift

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	1,554,976	2,256,467	2,430,649	2,287,939	8,530,031	2,022,576	253,873	423,959	1,071,640	3,772,048	-23.1	788.8	473.3	113.5	126.1
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

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

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US EAST	208,269	336,538	397,580	358,374	1,300,761	330,695	8,458	33,315	115,406	487,874	-37.0	3,878.9	1,093.4	210.5	166.6
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	0	1,758	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	####	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.

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2019	2020P ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	143,078	35,458	-75.2%	5,682	31,901	-82.2%
True Independent (Net)	5,674,869	1,739,480	-69.3%	739,625	1,221,859	-39.5%
Leisure vs business						
Pleasure (Net)	5,720,309	1,524,070	-73.4%	689,367	1,153,430	-40.2%
MCI (Net)	293,659	93,466	-68.2%	6,728	90,054	-92.5%
Convention/Conf.	171,970	60,368	-64.9%	2,470	59,197	-95.8%
Corp. Meetings	72,478	20,115	-72.2%	2,395	18,766	-87.2%
Incentive	59,031	15,936	-73.0%	2,042	14,936	-86.3%

U.S. West

U.S. WEST MMA (by Air)	2019	2020P ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	67,037	16,140	-75.9%	3,607	13,751	-73.8%
True Independent (Net)	3,836,896	1,164,871	-69.6%	520,406	795,150	-34.6%
Leisure vs business						
Pleasure (Net)	3,885,753	1,020,345	-73.7%	487,770	747,590	-34.8%
MCI (Net)	154,692	47,963	-69.0%	4,504	45,471	-90.1%
Convention/Conf.	91,100	29,958	-67.1%	1,638	29,100	-94.4%
Corp. Meetings	42,499	11,252	-73.5%	1,636	10,282	-84.1%
Incentive	25,831	8,142	-68.5%	1,342	7,404	-81.9%

U.S. East

U.S. EAST MMA (by Air)	2019	2020P ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	76,041	19,318	-74.6%	2,075	18,150	-88.6%
True Independent (Net)	1,837,972	574,609	-68.7%	219,219	426,709	-48.6%
Leisure vs business						
Pleasure (Net)	1,834,556	503,725	-72.5%	201,597	405,840	-50.3%
MCI (Net)	138,967	45,503	-67.3%	2,224	44,583	-95.0%
Convention/Conf.	80,869	30,410	-62.4%	832	30,097	-97.2%
Corp. Meetings	29,980	8,863	-70.4%	759	8,484	-91.1%
Incentive	33,199	7,794	-76.5%	700	7,532	-90.7%

^{3/} 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 ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
1st timers (%)	26.7	23.8	-3.0	24.4	24.5	-0.1
Repeaters (%)	73.3	76.2	3.0	75.6	75.5	0.1

U.S. West

U.S. WEST MMA (by Air)	2019	2020P ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
1st timers (%)	19.4	16.9	-2.5	17.5	17.6	-0.1
Repeaters (%)	80.6	83.1	2.5	82.5	82.4	0.1

U.S. East

U.S. EAST MMA (by Air)	2019	2020P ^{3/}	% Change 2020P vs 2019	YTD Mar. 2021P ^{3/}	YTD Mar. 2020P	% change YTD
1st timers (%)	41.5	37.1	-4.5	41.1	36.9	4.1
Repeaters (%)	58.5	62.9	4.5	58.9	63.1	-4.1

^{3/} 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 Mar. 2021P	YTD Mar. 2020P	% change YTD
State tax revenue generated (\$ Millions) ^{4/}	1,358.25	403.50*	NA	173.51	311.38	-44.3%

^{4/} State government tax revenue generated (direct, indirect, and induced)

* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March, November and December 2020.

U.S. West

U.S. WEST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
State tax revenue generated (\$ Millions) ^{4/}	811.48	238.55*	NA	114.70	176.42	-35.0%

^{4/} State government tax revenue generated (direct, indirect, and induced)

* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March, November and December 2020.

U.S. East

U.S. EAST MMA (by Air)	2019	2020P	% Change 2020P vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
State tax revenue generated (\$ Millions) ^{4/}	546.77	164.95*	NA	58.81	134.97	-56.4%

^{4/} State government tax revenue generated (direct, indirect, and induced)

* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March, November and December 2020.