



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 December 2021 Quick Facts^{1/}

Visitor Expenditures:	\$12.23 billion
Primary Purpose of Stay:	Pleasure (5,579,859) vs. MCI (92,309)
Average Length of Stay:	9.47 days
First Time Visitors:	29.1%
Repeat Visitors:	70.9%

U.S. Total

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
U.S. TOTAL (by Air)							
Visitor Expenditures (\$ Millions)	11,636.2	NA	NA	11,794.2	12,227.0	NA	NA
Visitor Days	61,786,807	21,998,856	-64.4%	60,842,760	61,217,787	21,998,856	178.3%
Arrivals	6,871,839	1,987,326	-71.1%	6,531,887	6,465,360	1,987,326	225.3%
Average Daily Census	169,279	60,106	-64.5%	166,692	167,720	60,106	179.0%
Per Person Per Day Spending (\$)	188.3	NA	NA	193.8	199.7	NA	NA
Per Person Per Trip Spending (\$)	1,693.3	NA	NA	1,805.6	1,891.1	NA	NA
Length of Stay (days)	8.99	11.07	23.1%	9.31	9.47	11.07	-14.5%

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.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2021).

^{1/} 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 ^{1//}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
U.S. WEST MMA (by Air)							
Visitor Expenditures (\$ Millions)	6,952.0	NA	NA	7,654.5	7,933.3	NA	NA
Visitor Days	39,752,689	13,921,800	-65.0%	40,733,128	40,904,390	13,921,800	193.8%
Arrivals	4,595,319	1,311,176	-71.5%	4,523,022	4,474,027	1,311,176	241.2%
Average Daily Census	108,911	38,038	-65.1%	111,598	112,067	38,038	194.6%
Per Person Per Day Spending (\$)	174.9	NA	NA	187.9	193.9	NA	NA
Per Person Per Trip Spending (\$)	1,512.8	NA	NA	1,692.4	1,773.2	NA	NA
Length of Stay (days)	8.65	10.62	22.7%	9.01	9.14	10.62	-13.9%

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.

^{1//}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2021).

U.S. East

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1//}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
U.S. EAST MMA (by Air)							
Visitor Expenditures (\$ Millions)	4,684.2	NA	NA	4,139.6	4,293.7	NA	NA
Visitor Days	22,034,119	8,077,056	-63.3%	20,109,632	20,313,397	8,077,056	151.5%
Arrivals	2,276,520	676,150	-70.3%	2,008,865	1,991,333	676,150	194.5%
Average Daily Census	60,367	22,068	-63.4%	55,095	55,653	22,068	152.2%
Per Person Per Day Spending (\$)	212.6	NA	NA	205.9	211.4	NA	NA
Per Person Per Trip Spending (\$)	2,057.6	NA	NA	2,060.7	2,156.2	NA	NA
Length of Stay (days)	9.68	11.95	23.4%	10.01	10.20	11.95	-14.6%

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.

^{1//}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2021).

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Market Summary

In December 2021, domestic passengers 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. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 viral test result taken within 24 hours of travel or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight. 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

- For all of 2021, there were 4,474,027 visitors from the U.S. West compared to 1,311,176 visitors (+241.2%) in 2020, versus 4,595,319 visitors (-2.6%) in 2019.
- Total visitor spending in 2021 was \$7.93 billion, an increase of 14.1 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, versus 42,760 flights with 8,564,295 seats in 2019.
- 2021 vs. 2020, there was increased air service from Anchorage (70,231, +84.8%), Denver (369,975 seats, +144.7%), Las Vegas (364,127, +306.1%), Long Beach (229,876, +1,080.8%), Los Angeles (2,480,143, +133.1%), Oakland (540,358, +79.1%), Phoenix (578,351 +224.6%), Portland (320,873, +103.6%), Sacramento (271,339, +122.1%), Salt Lake City (144,163, +174.4%), San Diego (545,821, +247.8%), San Francisco (1,210,504, +84.5%), San Jose (627,362, +226.0%) and Seattle (1,155,699, +95.2%); and new service from Ontario (50,652 seats) and Santa Ana (29,736).
- In 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

- In 2021, there were 1,991,333 visitors from the U.S. East compared to 676,150 visitors (+194.5%) in 2020, versus 2,276,520 visitors (-12.5%) in 2019.
- Total visitor spending in 2021 was \$4.29 billion, a decrease of 8.3 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, versus 4,129 flights with 1,182,495 seats in 2019.
- Comparing 2021 vs. 2020, increased service from Atlanta (88,613 seats, +219.8%), Boston (50,040, +176.9%) Chicago (230,275 +102.1%), Dallas (437,477, +112.5%), Houston (86,084, +105.6%), Minneapolis (60,391, +188.3%); New York JFK (76,172, +189.8%), Newark (73,322, +201.4%) and Washington D.C. (33,456, +373.7%) and new service from Austin (24,186), Charlotte (61,698) and Orlando (27,800); offset suspended flights from Detroit.
- In 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

- According to the official Bureau of Labor Statistics Employment Report for December 2021, payroll jobs increased by 199,000 on net for the month, well below consensus expectations of about +422,000 for the month.
- The Conference Board Consumer Confidence Index increased in December 2021. The Index now stands at 115.8 (1985=100) up from 111.9, an upward revision for November.
- The Present Situation Index based on consumers' assessment of current business and labor market conditions was flat at 144.1 from 144.4 last month. The Expectations Index based on consumers' short-term outlook for income, business and labor market conditions rose to 96.9 from 90.2 last month.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for December 2021-February 2022 will increase by +15.1 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 (+17.8%) and U.S. East (-1.7%). The situation is being monitored and the forecast adjusted accordingly.
- Domestic wholesale partners have seen cancellations due to the Omicron variant and airline disruptions and a slowdown in bookings for Q1, however, the holiday period and start of the new year are typically slow for Hawai'i bookings.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
O'ahu	3,326,507	967,359	-70.9%	3,140,053	967,359	224.6%
Maui County	2,488,629	672,005	-73.0%	2,236,665	672,005	232.8%
Maui	2,449,124	659,185	-73.1%	2,201,447	659,185	234.0%
Moloka'i	42,603	12,231	-71.3%	24,296	12,231	98.6%
Lāna'i	59,810	14,527	-75.7%	45,291	14,527	211.8%
Kaua'i	1,135,672	280,457	-75.3%	784,869	280,457	179.9%
Island of Hawai'i	1,251,171	379,153	-69.7%	1,137,813	379,153	200.1%

U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
O'ahu	2,005,506	582,276	-71.0%	2,005,091	582,276	244.4%
Maui County	1,641,441	438,612	-73.3%	1,545,958	438,612	252.5%
Maui	1,616,213	430,261	-73.4%	1,522,838	430,261	253.9%
Moloka'i	25,823	7,423	-71.3%	15,779	7,423	112.6%
Lāna'i	31,672	7,968	-74.8%	26,188	7,968	228.7%
Kaua'i	730,725	179,451	-75.4%	540,417	179,451	201.2%
Island of Hawai'i	786,520	244,963	-68.9%	763,792	244,963	211.8%

U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
O'ahu	1,321,001	385,083	-70.8%	1,134,962	385,083	194.7%
Maui County	847,188	233,393	-72.5%	690,707	233,393	195.9%
Maui	832,911	228,925	-72.5%	678,608	228,925	196.4%
Moloka'i	16,780	4,808	-71.3%	8,517	4,808	77.1%
Lāna'i	28,138	6,559	-76.7%	19,103	6,559	191.3%
Kaua'i	404,948	101,006	-75.1%	244,451	101,006	142.0%
Island of Hawai'i	464,651	134,191	-71.1%	374,021	134,191	178.7%

Airlift: Scheduled Seats

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	1,509,348	2,163,031	2,773,109	2,543,719	8,989,207	2,022,576	253,873	423,959	1,071,640	3,772,048	-25.4	752.0	554.1	137.4	138.3
Anchorage	19,716	13,833	11,702	24,980	70,231	29,256	0	0	8,745	38,001	-32.6	NA	NA	185.6	84.8
Denver	52,767	95,755	119,828	101,625	369,975	80,667	507	12,702	57,320	151,196	-34.6	18786.6	843.4	77.3	144.7
Las Vegas	42,256	57,249	134,376	130,246	364,127	69,576	0	0	20,082	89,658	-39.3	NA	NA	548.6	306.1
Long Beach	24,766	64,470	77,273	63,364	229,873	16,443	0	0	3,024	19,467	50.6	NA	NA	1995.4	1080.8
Los Angeles	371,317	594,918	803,612	710,296	2,480,143	556,146	99,818	140,956	267,284	1,064,204	-33.2	496.0	470.1	165.7	133.1
Oakland	109,650	129,029	157,514	144,165	540,358	153,858	32,375	32,200	83,225	301,658	-28.7	298.5	389.2	73.2	79.1
Ontario	2,079	13,986	17,388	17,199	50,652	0	0	0	0	0	NA	NA	NA	NA	NA
Phoenix	90,147	144,673	172,296	171,235	578,351	102,399	0	6,272	69,507	178,178	-12.0	NA	2647.1	146.4	224.6
Portland	71,639	85,864	78,517	84,853	320,873	110,849	0	15,498	31,260	157,607	-35.4	NA	406.6	171.4	103.6
Sacramento	61,405	64,339	73,269	72,326	271,339	71,883	700	11,340	38,269	122,192	-14.6	9091.3	546.1	89.0	122.1
Salt Lake City	38,908	44,565	33,431	27,259	144,163	41,020	0	0	11,526	52,546	-5.1	NA	NA	136.5	174.4
San Diego	73,957	116,653	188,167	167,044	545,821	79,758	0	20,282	56,904	156,944	-7.3	NA	827.8	193.6	247.8
San Francisco	205,670	282,002	382,039	340,793	1,210,504	332,865	55,630	100,571	166,902	655,968	-38.2	406.9	279.9	104.2	84.5
San Jose	126,936	150,880	185,192	164,354	627,362	114,667	525	0	77,245	192,437	10.7	28639.0	NA	112.8	226.0
Santa Ana	0	6,930	11,592	11,214	29,736	0	0	0	0	0	NA	NA	NA	NA	NA
Seattle	218,135	297,885	326,913	312,766	1,155,699	263,189	64,318	84,138	180,347	591,992	-17.1	363.1	288.5	73.4	95.2

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of January 14, 2022 subject to change.

	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US EAST	200,235	311,750	400,887	336,642	1,249,514	330,695	8,458	33,315	115,406	487,874	-39.5	3585.9	1103.3	191.7	156.1
Atlanta	15,886	22,203	26,663	23,861	88,613	24,542	0	0	3,164	27,706	-35.3	NA	NA	654.1	219.8
Austin		6,672	9,452	8,062	24,186		0	0	0	0		NA	NA	NA	NA
Boston	6,950	9,730	16,680	16,680	50,040	16,958	0	0	1,112	18,070	-59.0	NA	NA	1400.0	176.9
Charlotte		12,831	25,116	23,751	61,698		0	0	0	0		NA	NA	NA	NA
Chicago	37,735	63,428	82,441	46,671	230,275	74,438	1,284	7,665	30,568	113,955	-49.3	4839.9	975.6	52.7	102.1
Dallas	97,135	102,464	119,682	118,196	437,477	109,434	6,318	25,650	64,488	205,890	-11.2	1521.8	366.6	83.3	112.5
Detroit	0	0	0	0	0	1758	0	0	0	1758	-100.0	NA	NA	NA	-100.0
Houston	15,194	21,210	24,840	24,840	86,084	32,032	856	0	8,988	41,876	-52.6	2377.8	NA	176.4	105.6
Minneapolis	13,994	21,199	14,943	10,255	60,391	18,459	0	0	2,486	20,945	-24.2	NA	NA	312.5	188.3
New York JFK	10,008	18,348	24,186	23,630	76,172	24,892	0	0	1,390	26,282	-59.8	NA	NA	1600.0	189.8
Newark	1,665	15,953	29,950	25,754	73,322	21,120	0	0	3,210	24,330	-92.1	NA	NA	702.3	201.4
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	17,760	6,324	33,456	7,062	0	0	0	7,062	-100.0	NA	NA	NA	373.7

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of January 14, 2022 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 Dec. 2021	YTD Dec. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	143,078	NA	NA	79,366	NA	NA
True Independent (Net)	5,674,869	NA	NA	5,532,447	NA	NA
Leisure vs business						
Pleasure (Net)	5,720,309	1,526,068	-73.3%	5,579,859	1,526,068	265.6%
MCI (Net)	293,659	93,411	-68.2%	92,309	93,411	-1.2%
Convention/Conf.	171,970	60,311	-64.9%	41,964	60,311	-30.4%
Corp. Meetings	72,478	20,111	-72.3%	26,975	20,111	34.1%
Incentive	59,031	15,943	-73.0%	26,765	15,943	67.9%

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.

U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	67,037	NA	NA	43,933	NA	NA
True Independent (Net)	3,836,896	NA	NA	3,855,860	NA	NA
Leisure vs business						
Pleasure (Net)	3,885,753	1,022,954	-73.7%	3,904,723	1,022,954	281.7%
MCI (Net)	154,692	47,904	-69.0%	52,974	47,904	10.6%
Convention/Conf.	91,100	29,902	-67.2%	25,550	29,902	-14.6%
Corp. Meetings	42,499	11,246	-73.5%	16,183	11,246	43.9%
Incentive	25,831	8,146	-68.5%	12,960	8,146	59.1%

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. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	76,041	NA	NA	35,432	NA	NA
True Independent (Net)	1,837,972	NA	NA	1,676,586	NA	NA
Leisure vs business						
Pleasure (Net)	1,834,556	503,113	-72.6%	1,675,136	503,113	233.0%
MCI (Net)	138,967	45,507	-67.3%	39,335	45,507	-13.6%
Convention/Conf.	80,869	30,409	-62.4%	16,414	30,409	-46.0%
Corp. Meetings	29,980	8,866	-70.4%	10,792	8,866	21.7%
Incentive	33,199	7,797	-76.5%	13,804	7,797	77.0%

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 Dec. 2021	YTD Dec. 2020	% Change YTD
1st timers (%)	26.7	NA	NA	29.1	NA	NA
Repeaters (%)	73.3	NA	NA	70.9	NA	NA

U.S. West

U.S. WEST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
1st timers (%)	19.4	NA	NA	21.5	NA	NA
Repeaters (%)	80.6	NA	NA	78.5	NA	NA

U.S. East

U.S. EAST MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
1st timers (%)	41.5	NA	NA	46.3	NA	NA
Repeaters (%)	58.5	NA	NA	53.7	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 Dec. 2021	YTD Dec. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	1,358.25	NA	NA	1,427.20	NA	NA

^{2/}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 Dec. 2021	YTD Dec. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	811.48	NA	NA	926.02	NA	NA

^{2/}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 Dec. 2021	YTD Dec. 2020	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	546.77	NA	NA	501.18	NA	NA

^{2/}State government tax revenue generated (direct, indirect, and induced).