



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-arrival through messages that resonates with them throughout their stay. HTUSA will promote the Kuleana and Mālama Hawai'i campaigns, working with visitor industry partners to encourage 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 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 February 2024 Quick Facts^{1/}

Visitor Expenditures:	\$2.56 billion
Primary Purpose of Stay:	Pleasure (877,401) vs. MCI (69,969)
Average Length of Stay:	9.50 days
First Time Visitors:	22.4%
Repeat Visitors:	77.6%

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures (\$ Millions)	11,636.2	NA	12,317.9	16,250.3	15,943.2	15,543.1	2,560.4	2,687.1	-4.7%
Visitor Days	61,786,807	21,998,856	61,249,728	69,916,446	66,275,818	63,320,734	10,558,336	11,308,411	-6.6%
Arrivals	6,871,839	1,987,326	6,468,899	7,746,478	7,426,047	7,108,894	1,111,846	1,178,701	-5.7%
Average Daily Census	169,279	60,106	167,807	191,552	181,578	173,007	175,972	191,668	-8.2%
Per Person Per Day Spending (\$)	188.3	NA	201.1	232.4	240.6	245.5	242.5	237.6	2.1%
Per Person Per Trip Spending (\$)	1,693.3	NA	1,904.2	2,097.8	2,146.9	2,186.4	2,302.8	2,279.7	1.0%
Length of Stay (days)	8.99	11.07	9.47	9.03	8.92	8.91	9.50	9.59	-1.0%

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) 2024 annual forecast (Quarter 1, 2024).

^{1/} 2023 and 2024 visitor data are preliminary. 2019 – 2022 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	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures (\$ Millions)	6,952.0	NA	7,994.4	10,086.9	9,644.3	9,362.9	1,494.7	1,544.1	-3.2%
Visitor Days	39,752,689	13,921,800	40,900,008	45,472,465	42,552,136	40,500,602	6,471,890	6,863,473	-5.7%
Arrivals	4,595,319	1,311,176	4,473,588	5,277,349	4,998,895	4,764,777	729,404	762,253	-4.3%
Average Daily Census	108,911	38,038	112,055	124,582	116,581	110,657	107,865	116,330	-7.3%
Per Person Per Day Spending (\$)	174.9	NA	195.5	221.8	226.6	231.2	231.0	225.0	2.7%
Per Person Per Trip Spending (\$)	1,512.8	NA	1,787.0	1,911.4	1,929.3	1,965.0	2,049.2	2,025.8	1.2%
Length of Stay (days)	8.65	10.62	9.14	8.62	8.51	8.50	8.87	9.00	-1.5%

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.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 1, 2024).

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures (\$ Millions)	4,684.2	NA	4,323.5	6,163.4	6,298.9	6,180.2	1,065.7	1,142.9	-6.8%
Visitor Days	22,034,119	8,077,056	20,349,720	24,443,981	23,723,683	22,820,132	4,086,446	4,444,937	-8.1%
Arrivals	2,276,520	676,150	1,995,311	2,469,128	2,427,152	2,344,117	382,442	416,449	-8.2%
Average Daily Census	60,367	22,068	55,753	66,970	64,996	62,350	68,107	75,338	-9.6%
Per Person Per Day Spending (\$)	212.6	NA	212.5	252.1	265.5	270.8	260.8	257.1	1.4%
Per Person Per Trip Spending (\$)	2,057.6	NA	2,166.8	2,496.2	2,595.2	2,636.5	2,786.6	2,744.5	1.5%
Length of Stay (days)	9.68	11.95	10.20	9.90	9.77	9.74	10.69	10.67	0.1%

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) 2024 annual forecast (Quarter 1, 2024).

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Market Summary

U.S. West

- In the first two months of 2024, 729,404 visitors arrived from U.S. West and visitor spending was \$1.49 billion. There were 762,253 visitors in the first two months of 2023 and visitor spending was \$1.54 billion. In the first two months of pre-pandemic 2019, 629,890 visitors came from this market and visitor spending was \$1.06 billion.
- In the first two months of 2024, 6,776 scheduled flights with 1,419,361 seats serviced Hawai'i from U.S. West. In the first two months of 2023, there were 7,229 scheduled flights with 1,504,067 seats. In the first two months of 2019 there were 6,280 scheduled flights with 1,259,601 seats.
- In 2023, there were 4,998,895 visitors from the U.S. West, compared to 5,277,349 visitors (-5.3%) in 2022 and 4,595,319 visitors (+8.8%) in 2019.
- U.S. West visitors spent \$9.64 billion in 2023, compared to \$10.09 billion (-4.4%) in 2022 and \$6.95 billion (+38.7%) in 2019. The average daily visitor spending in 2023 was \$227 per person, a moderate increase from \$222 per person (+2.2%) in 2022, but up significantly from \$175 per person (+29.6%) in 2019.
- There were 45,706 scheduled flights with 9,438,011 seats from the U.S. West in 2023, compared to 48,899 flights (-6.5%) with 9,813,512 seats (-3.8%) in 2022, and 42,760 flights (+6.9%) with 8,564,295 seats (+10.2%) in 2019.

U.S. East

- In the first two months of 2024, 382,442 visitors came from U.S. East and visitor spending was \$1.07 billion. There were 416,449 visitors in the first two months of 2023 and visitor spending was \$1.14 billion. In the first two months of 2019, 362,029 visitors arrived from U.S. East and visitor spending was \$834.5 million.
- In the first two months of 2024, 808 scheduled flights with 214,682 seats serviced Hawai'i from U.S. East. In the first two months of 2023, there were 921 scheduled flights with 259,800 seats. In the first two months of 2019 there were 624 scheduled flights with 183,395 seats.
- For all of 2023, 2,427,152 visitors arrived from the U.S. East, compared to 2,469,128 visitors (-1.7%) in 2022 and 2,276,520 visitors (+6.6%) in 2019.
- U.S. East visitors spent \$6.30 billion in 2023, compared to \$6.16 billion (+2.2%) in 2022 and \$4.68 billion (+34.5%) in 2019. Daily visitor spending in 2023 increased to \$266 per person, compared to \$252 per person (+5.3%) in 2022 and \$213 per person (+24.9%) in 2019.
- There were 4,498 scheduled flights with 1,225,721 seats from the U.S. East in 2023, compared to 4,565 flights (-1.5%) with 1,262,967 seats (-2.9%) in 2022, and 4,129 flights (+8.9%) with 1,182,495 seats (+3.7%) in 2019.

Market Conditions

- The February forecast upgrades the outlook of real GDP growth for 2024, after a stronger-than-expected GDP report for the fourth quarter of 2023 was released in late January 2024.
- The Conference Board Consumer Confidence Index fell in February 2024 to 106.7 (1985=100), down from a revised 110.9 in January 2024. February's decline in the Index occurred after three consecutive months of gains. The Present Situation Index – based on consumers' assessment of current business and labor market conditions – fell to 147.2 in February 2024 (1985=100) from 154.9 last month. The Expectations Index – based on consumers' short-term outlook for income, business, and labor market conditions – slipped to 79.8 (1985=100) in February 2024, up from 81.5 in January.
- Conde Nast Traveler reports that in 2024, travelers will be putting what is important to them front and center of their plans, valuing deeper experiences that leave a positive impact, time spent with loved ones, and wellness moments that last well after checkout.
- The forecast for domestic scheduled nonstop air seats to Hawai'i during March to May 2024 will decrease 3.9 percent compared to the same period in 2023. This projection is based on flights appearing in Diio Mi. A decrease in flights is expected from U.S. West (-3.8%) with a more significant decrease in U.S. East (-4.3%). In the aftermath of the wildfires on Maui, this amplifies the immediate reduction in non-stop transpacific seats directly into OGG.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	3,326,507	967,359	3,142,030	3,833,641	3,922,210	588,800	596,558	-1.3%
Maui County	2,488,629	672,005	2,239,395	2,559,232	2,127,346	296,803	378,949	-21.7%
Maui	2,449,124	659,185	2,204,165	2,517,446	2,088,387	290,580	372,150	-21.9%
Moloka'i	42,603	12,231	24,316	34,943	32,793	5,624	6,367	-11.7%
Lāna'i	59,810	14,527	45,369	55,776	49,402	6,569	8,816	-25.5%
Kaua'i	1,135,672	280,457	785,082	1,207,346	1,247,717	187,494	181,810	3.1%
Island of Hawai'i	1,251,171	379,153	1,137,156	1,437,755	1,469,895	235,150	236,287	-0.5%

U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	2,005,506	582,276	2,005,024	2,426,014	2,447,549	364,598	364,022	0.2%
Maui County	1,641,441	438,612	1,546,151	1,682,959	1,376,606	183,588	229,503	-20.0%
Maui	1,616,213	430,261	1,523,024	1,655,700	1,351,946	179,556	225,057	-20.2%
Moloka'i	25,823	7,423	15,779	22,077	19,302	3,293	3,754	-12.3%
Lāna'i	31,672	7,968	26,221	31,446	26,895	3,642	4,717	-22.8%
Kaua'i	730,725	179,451	540,578	810,540	810,038	114,727	110,420	3.9%
Island of Hawai'i	786,520	244,963	763,139	922,666	932,291	146,328	144,946	1.0%

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	1,321,001	385,083	1,137,006	1,407,627	1,474,661	224,202	232,536	-3.6%
Maui County	847,188	233,393	693,244	876,274	750,740	113,215	149,446	-24.2%
Maui	832,911	228,925	681,140	861,746	736,440	111,024	147,093	-24.5%
Moloka'i	16,780	4,808	8,536	12,867	13,491	2,331	2,613	-10.8%
Lāna'i	28,138	6,559	19,148	24,331	22,507	2,927	4,100	-28.6%
Kaua'i	404,948	101,006	244,504	396,806	437,679	72,766	71,390	1.9%
Island of Hawai'i	464,651	134,191	374,017	515,089	537,604	88,822	91,341	-2.8%

Group vs. True Independent; Leisure vs. Business

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	143,078	NA	79,289	147,663	157,806	25,199	27,318	-7.8%
True Independent (Net)	5,674,869	NA	5,535,997	6,590,514	6,348,681	980,241	1,027,690	-4.6%
Leisure vs Business								
Pleasure (Net)	5,720,309	1,526,068	5,581,810	6,543,964	6,101,653	877,401	955,938	-8.2%
MCI (Net)	293,659	93,411	91,854	253,640	284,944	69,969	63,807	9.7%
Convention/Conf.	171,970	60,311	41,590	138,892	176,111	47,199	40,264	17.2%
Corp. Meetings	72,478	20,111	26,955	66,531	67,717	15,073	15,152	-0.5%
Incentive	59,031	15,943	26,694	57,383	50,909	9,872	10,441	-5.4%

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	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	67,037	NA	43,863	73,688	78,450	12,041	12,034	0.1%
True Independent (Net)	3,836,896	NA	3,856,005	4,542,501	4,329,315	651,624	676,092	-3.6%
Leisure vs Business								
Pleasure (Net)	3,885,753	1,022,954	3,903,665	4,521,560	4,173,987	587,995	629,780	-6.6%
MCI (Net)	154,692	47,904	52,735	135,008	149,397	36,549	31,691	15.3%
Convention/Conf.	91,100	29,902	25,344	76,534	93,704	24,396	20,078	21.5%
Corp. Meetings	42,499	11,246	16,185	36,841	37,651	8,438	7,920	6.5%
Incentive	25,831	8,146	12,917	25,726	22,542	4,664	4,711	-1.0%

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.

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	76,041	NA	35,426	73,975	79,356	13,158	15,284	-13.9%
True Independent (Net)	1,837,972	NA	1,679,991	2,048,013	2,019,366	328,617	351,598	-6.5%
Leisure vs Business								
Pleasure (Net)	1,834,556	503,113	1,678,144	2,022,404	1,927,666	289,406	326,158	-11.3%
MCI (Net)	138,967	45,507	39,120	118,632	135,547	33,420	32,116	4.1%
Convention/Conf.	80,869	30,409	16,246	62,358	82,408	22,803	20,186	13.0%
Corp. Meetings	29,980	8,866	10,770	29,690	30,065	6,635	7,231	-8.2%
Incentive	33,199	7,797	13,776	31,656	28,367	5,208	5,729	-9.1%

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.

First Time vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	26.7	NA	29.1	27.8	26.5	22.4	24.6	-2.2
Repeat Visitors (%)	73.3	NA	70.9	72.2	73.5	77.6	75.4	2.2

U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	19.4	NA	21.5	20.7	19.3	15.9	17.6	-1.7
Repeat Visitors (%)	80.6	NA	78.5	79.3	80.7	84.1	82.4	1.7

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U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	41.5	NA	46.2	43.1	41.4	34.8	37.4	-2.6
Repeat Visitors (%)	58.5	NA	53.8	56.9	58.6	65.2	62.6	2.6

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	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	1,358.25	NA	1,437.81	1,885.03	1,849.42	297.01	311.70	-4.7%

^{2/}State government tax revenue generated (direct, indirect, and induced).00

U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	811.48	NA	933.16	1,170.08	1,118.74	173.39	179.12	-3.2%

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

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	546.77	NA	504.66	714.95	730.68	123.62	132.58	-6.8%

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