



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's) continued focus on Maui Wildfire recovery efforts includes welcoming visitors who want to give back to Hawai'i during their visit, with an emphasis on providing education pre-arrival through messages that resonate with them throughout their stay. HTUSA did so with "The People. The Place. The Hawaiian Islands" campaign and works 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.

Year-to-Date March 2025 Quick Facts^{1/}

Visitor Expenditures:	\$4.30 billion
Primary Purpose of Stay:	Pleasure (1,499,563) vs. MCI (106,120)
Average Length of Stay:	9.00 days
First Time Visitors:	23.3%
Repeat Visitors:	76.7%

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Visitor Expenditures (\$ Millions)	11,636.2	NA	12,317.9	16,250.3	15,821.7	15,814.7	15,761.7	4,297.4	3,922.8	9.6%
Visitor Days	61,786,807	21,998,856	61,249,728	69,916,446	66,288,269	64,709,316	64,266,296	16,575,256	16,175,622	2.5%
Arrivals	6,871,839	1,987,326	6,468,899	7,746,478	7,427,242	7,350,028	7,289,482	1,842,348	1,773,980	3.9%
Average Daily Census	169,279	60,106	167,807	191,552	181,612	176,801	176,072	184,170	177,754	3.6%
Per Person Per Day Spending (\$)	188.3	NA	201.1	232.4	238.7	244.4	245.3	259.3	242.5	6.9%
Per Person Per Trip Spending (\$)	1,693.3	NA	1,904.2	2,097.8	2,130.2	2,151.7	2,162.3	2,332.6	2,211.3	5.5%
Length of Stay (days)	8.99	11.07	9.47	9.03	8.93	8.80	8.82	9.00	9.12	-1.3%

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) 2025 annual forecast (Quarter 1, 2025).

P=Preliminary data. RP=March 2024 preliminary data were revised.

^{1/} 2024P and 2025P visitor data are preliminary. 2019 – 2023 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

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Visitor Expenditures (\$ Millions)	6,952.0	NA	7,994.4	10,086.9	9,592.7	9,692.8	9,826.0	2,536.6	2,316.8	9.5%
Visitor Days	39,752,689	13,921,800	40,900,008	45,472,465	42,564,352	41,839,846	41,299,871	10,214,229	10,017,066	2.0%
Arrivals	4,595,319	1,311,176	4,473,588	5,277,349	5,000,099	4,981,953	4,928,386	1,197,682	1,162,187	3.1%
Average Daily Census	108,911	38,038	112,055	124,582	116,615	114,317	113,150	113,491	110,078	3.1%
Per Person Per Day Spending (\$)	174.9	NA	195.5	221.8	225.4	231.7	237.9	248.3	231.3	7.4%
Per Person Per Trip Spending (\$)	1,512.8	NA	1,787.0	1,911.4	1,918.5	1,945.6	1,993.8	2,117.9	1,993.5	6.2%
Length of Stay (days)	8.65	10.62	9.14	8.62	8.51	8.40	8.38	8.53	8.62	-1.1%

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.
P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Visitor Expenditures (\$ Millions)	4,684.2	NA	4,323.5	6,163.4	6,229.0	6,121.9	6,297.5	1,760.8	1,606.0	9.6%
Visitor Days	22,034,119	8,077,056	20,349,720	24,443,981	23,723,917	22,869,470	23,199,203	6,361,026	6,158,556	3.3%
Arrivals	2,276,520	676,150	1,995,311	2,469,128	2,427,144	2,368,075	2,411,560	644,667	611,793	5.4%
Average Daily Census	60,367	22,068	55,753	66,970	64,997	62,485	63,559	70,678	67,676	4.4%
Per Person Per Day Spending (\$)	212.6	NA	212.5	252.1	262.6	267.7	271.5	276.8	260.8	6.2%
Per Person Per Trip Spending (\$)	2,057.6	NA	2,166.8	2,496.2	2,566.4	2,585.2	2,611.4	2,731.4	2,625.1	4.0%
Length of Stay (days)	9.68	11.95	10.20	9.90	9.77	9.66	9.62	9.87	10.07	-2.0%

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.
P=Preliminary data. RP=March 2024 preliminary data were revised.

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Market Summary

U.S. West

- In the first quarter of 2025, there were 1,197,682 visitors from the U.S. West, compared to 1,162,187 visitors (+3.1%) in the first quarter of 2024 and 1,028,938 visitors (+16.4%) in the first quarter of 2019. U.S. West visitors spent \$2.54 billion in the first quarter of 2025 compared to \$2.32 billion (+9.5%) in the first quarter of 2024 and \$1.63 billion (+55.2%) in the first quarter of 2019. The average daily visitor spending in the first quarter of 2025 was \$248 per person, higher than the first quarter of 2024 (\$231 per person, +7.4%) and up considerably from the first quarter of pre-pandemic 2019 (\$180 per person, +38.3%).
- There were 10,842 scheduled flights with 2,257,351 seats from U.S. West in the first quarter of 2025. Air capacity increased compared to the first quarter of 2024 (10,626 flights, +2.0% with 2,223,559 seats, +1.5%) and the first quarter of 2019 (9,873 flights, +9.8% with 1,980,931 seats, +14.0%).
- In 2024, there were 4,981,953 visitors from the U.S. West, compared to 5,000,099 visitors in 2023 and 4,595,319 visitors in pre-pandemic 2019. U.S. West visitors spent \$9.69 billion in 2024, compared to \$9.59 billion in 2023 and \$6.95 billion in 2019. The average daily visitor spending in 2024 was \$232 per person, higher than 2023 (\$225 per person) and up significantly from 2019 (\$175 per person).
- In 2024, 45,049 scheduled flights with 9,365,338 seats serviced Hawai'i from U.S. West. In 2023, there were 45,706 scheduled flights with 9,438,011 seats. In 2019 there were 42,760 scheduled flights with 8,564,295 seats.

U.S. East

- In the first quarter of 2025, 644,667 visitors arrived from U.S. East, compared to 611,793 visitors (+5.4%) in the first quarter of 2024 and 587,678 visitors (+9.7%) in the first quarter of 2019. U.S. East visitors spent \$1.76 billion in the first quarter of 2025, compared to \$1.61 billion (+9.6%) in the first quarter of 2024 and \$1.24 billion (+42.1%) in the first quarter of 2019. Daily visitor spending in the first quarter of 2025 of \$277 per person was higher than the first quarter of 2024 (\$261 per person, +6.2%) and the first quarter of 2019 (\$209 per person, +32.4%).
- In the first quarter of 2025, 1,386 scheduled flights with 377,624 seats operated from U.S. East. Air capacity increased compared to the first quarter of 2024 (1,226 flights, +13.1% with 326,001 seats, +15.8%) and the first two months of 2019 (1,027 flights, +35.0% with 298,648 seats, +26.4%).
- In 2024, 2,368,075 visitors arrived from the U.S. East, compared to 2,427,144 visitors in 2023 and 2,276,520 visitors in 2019. U.S. East visitors spent \$6.12 billion in 2024, compared to \$6.23 billion in 2023 and \$4.68 billion in 2019. Daily visitor spending in 2024 (\$268 per person) increased from 2023 (\$263 per person) and was much higher than 2019 (\$213 per person)
- In 2024, 4,448 scheduled flights with 1,192,854 seats serviced Hawai'i from U.S. East. In 2023, there were 4,498 scheduled flights with 1,225,721 seats. In 2019 there were 4,129 scheduled flights with 1,182,495 seats .

Market Conditions

- Uncertainty reigns as President Donald Trump settles in. The flurry of executive orders and policy statements, especially at Senate confirmation hearings for Mr. Trump’s nominees, have clarified a few issues. The rest of Mr. Trump’s promised actions and their potential impacts, however, remain uncertain. Against this backdrop, it is understandable that the current range of forecasts for U.S. economic growth in 2025 is unusually wide—from 1.5 percent to 2.7 percent. In fact, the U.S. Chamber of Commerce has argued that a 2025 growth rate of more than 3 percent is likely. Likewise, expected growth in labor productivity has ranged from 1.5 percent to 3 percent in 2025. By emphasizing certain lines of policy actions and developments, it is possible to present plausible scenarios for either slow or strong growth prospects.
- The Conference Board Consumer Confidence Index declined by 5.4 points in January 2025, to 104.1 (1985=100). The reading for December 2024 was revised by 4.8 points to 109.5 but was still down 3.3 points from the previous month. The Present Situation Index—based on consumers’ assessment of current business and labor market conditions—fell sharply in January 2025, dropping 9.7 points to 134.3. The Expectations Index—based on consumers’ short-term outlook for income, business, and labor market conditions—fell 2.6 points to 83.9, but remained above the threshold of 80 that usually signals a recession ahead. The cutoff date for preliminary results was Jan. 20, 2025.
- HTA Airline Seat Capacity Outlook for February-April 2025 was updated on Feb 4. The forecast for domestic scheduled nonstop air seats to Hawai‘i during this period will be up 2.4 percent compared to the same period in 2024/25. This projection is based on flights appearing in Diio Mi. An increase in seats is expected from U.S. West (+1.4%) with a large increase from the U.S. East (+19.2%). The growth in the East is due to the new Delta HNL-BOS flight starting in November and resumption of seasonal Delta service from ATL-OGG, ORD-KOA, ORD-OGG, and additional frequencies to existing markets.

Distribution by Island

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
O‘ahu	3,326,507	967,359	3,142,030	3,833,641	3,922,673	3,967,370	962,529	942,781	2.1%
Maui County	2,488,629	672,005	2,239,395	2,559,232	2,119,667	2,029,209	538,516	475,812	13.2%
Maui	2,449,124	659,185	2,204,165	2,517,446	2,091,413	2,000,505	531,513	467,163	13.8%
Moloka‘i	42,603	12,231	24,316	34,943	22,705	22,046	5,622	7,376	-23.8%
Lāna‘i	59,810	14,527	45,369	55,776	38,299	36,006	8,936	9,526	-6.2%
Kaua‘i	1,135,672	280,457	785,082	1,207,346	1,248,478	1,212,048	296,920	292,142	1.6%
Island of Hawai‘i	1,251,171	379,153	1,137,156	1,437,755	1,471,531	1,423,012	370,685	365,475	1.4%

P=Preliminary data. RP=March 2024 preliminary data were revised.

Scheduled seats	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US EAST	377,624	282,395	250,016	329,263	1,239,298	326,001	287,650	275,009	304,194	1,192,854	15.8	-1.8	-9.1	8.2	3.9
Atlanta	40,716	28,470	25,944	44,544	139,674	25,662	25,662	25,944	34,800	112,068	58.7	10.9	0.0	28.0	24.6
Austin	5,282	0	0	0	5,282	9,730	12,510	12,510	10,564	45,314	-45.7	-100.0	-100.0	-100.0	-88.3
Boston	30,824	23,740	16,680	14,456	85,700	13,622	16,124	16,124	25,168	71,038	126.3	47.2	3.4	-42.6	20.6
Chicago	69,972	40,365	32,415	52,545	195,297	48,060	34,284	32,415	40,926	155,685	45.6	17.7	0.0	28.4	25.4
Dallas	76,239	57,450	50,232	82,641	266,562	68,136	57,291	60,381	62,931	248,739	11.9	0.3	-16.8	31.3	7.2
Detroit	20,172	19,656	19,872	21,822	81,522	25,603	20,574	17,854	20,142	84,173	-21.2	-4.5	11.3	8.3	-3.1
Houston	32,396	36,400	34,944	33,488	137,228	33,124	48,048	43,680	33,488	158,340	-2.2	-24.2	-20.0	0.0	-13.3
Minneapolis	25,248	19,656	19,872	23,568	88,344	19,736	19,656	19,440	23,664	82,496	27.9	0.0	2.2	-0.4	7.1
New York JFK	40,572	46,494	47,054	42,801	176,921	46,356	44,954	43,658	39,703	174,671	-12.5	3.4	7.8	7.8	1.3
Newark	18,185	3,927		7,623	29,735	20,957	3,003		7,495	31,455	-13.2	30.8		1.7	-5.5
Washington D.C.	18,018	6,237	3,003	5,775	33,033	15,015	5,544	3,003	5,313	28,875	20.0	12.5	0.0	8.7	14.4

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US EAST	1,386	1,047	918	1,236	4,587	1,226	1,080	1,027	1,115	4,448	13.1	-3.1	-10.6	10.9	3.1
Atlanta	161	104	92	161	518	91	91	92	133	407	76.9	14.3	0.0	21.1	27.3
Austin	19	0	0	0	19	35	45	45	38	163	-45.7	-100.0	-100.0	-100.0	-88.3
Boston	110	89	60	52	311	49	58	58	90	255	124.5	53.4	3.4	-42.2	22.0
Chicago	229	130	105	186	650	170	113	105	132	520	34.7	15.0	0.0	40.9	25.0
Dallas	297	216	184	340	1,037	272	240	249	251	1,012	9.2	-10.0	-26.1	35.5	2.5
Detroit	72	91	92	83	338	91	91	79	75	336	-20.9	0.0	16.5	10.7	0.6
Houston	89	100	96	92	377	91	132	120	92	435	-2.2	-24.2	-20.0	0.0	-13.3
Minneapolis	90	91	92	92	365	91	91	90	90	362	-1.1	0.0	2.2	2.2	0.8
New York JFK	162	182	184	172	700	180	182	176	158	696	-10.0	0.0	4.5	8.9	0.6
Newark	79	17		33	129	91	13		33	137	-13.2	30.8		0.0	-5.8
Washington D.C.	78	27	13	25	143	65	24	13	23	125	20.0	12.5	0.0	8.7	14.4

Source: DBEDT analysis from Diio Mi seat and flight schedules as of April 24, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

U.S. Total

	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
U.S. TOTAL (by Air)									
Group vs True Independent (Net)									
Group Tour	143,078	NA	79,289	147,663	157,796	150,765	42,245	41,241	2.4%
True Independent (Net)	5,674,869	NA	5,535,997	6,590,514	6,349,793	6,327,308	1,609,691	1,551,714	3.7%
Leisure vs Business									
Pleasure (Net)	5,720,309	1,526,068	5,581,810	6,543,964	6,102,921	6,003,869	1,499,563	1,427,360	5.1%
MCI (Net)	293,659	93,411	91,854	253,640	284,964	292,490	106,120	94,836	11.9%
Convention/Conf.	171,970	60,311	41,590	138,892	176,132	186,129	73,870	61,465	20.2%
Corp. Meetings	72,478	20,111	26,955	66,531	67,717	67,056	21,281	21,310	-0.1%
Incentive	59,031	15,943	26,694	57,383	50,903	48,768	14,028	15,210	-7.8%

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.

P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. West

	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
U.S. WEST MMA (by Air)									
Group vs True Independent (Net)									
Group Tour	67,037	NA	43,863	73,688	78,455	78,370	18,950	19,736	-4.0%
True Independent (Net)	3,836,896	NA	3,856,005	4,542,501	4,330,416	4,329,962	1,061,916	1,029,796	3.1%
Leisure vs Business									
Pleasure (Net)	3,885,753	1,022,954	3,903,665	4,521,560	4,175,148	4,132,185	991,601	952,794	4.1%
MCI (Net)	154,692	47,904	52,735	135,008	149,411	157,280	51,461	49,014	5.0%
Convention/Conf.	91,100	29,902	25,344	76,534	93,707	102,419	35,005	31,447	11.3%
Corp. Meetings	42,499	11,246	16,185	36,841	37,661	37,446	11,385	11,703	-2.7%
Incentive	25,831	8,146	12,917	25,726	22,539	21,523	6,414	7,149	-10.3%

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.

P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	76,041	NA	35,426	73,975	79,340	72,394	23,295	21,505	8.3%
True Independent (Net)	1,837,972	NA	1,679,991	2,048,013	2,019,377	1,997,347	547,775	521,918	5.0%
Leisure vs Business									
Pleasure (Net)	1,834,556	503,113	1,678,144	2,022,404	1,927,773	1,862,369	507,962	474,566	7.0%
MCI (Net)	138,967	45,507	39,120	118,632	135,553	135,210	54,659	45,822	19.3%
Convention/Conf.	80,869	30,409	16,246	62,358	82,424	83,710	38,865	30,017	29.5%
Corp. Meetings	29,980	8,866	10,770	29,690	30,056	29,609	9,896	9,607	3.0%
Incentive	33,199	7,797	13,776	31,656	28,364	27,245	7,614	8,061	-5.5%

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.
P=Preliminary data. RP=March 2024 preliminary data were revised.

First Time vs. Repeat Visitors

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
First Time Visitors (%)	26.7	NA	29.1	27.8	26.5	25.1	23.3	23.0	0.3
Repeat Visitors (%)	73.3	NA	70.9	72.2	73.5	74.9	76.7	77.0	-0.3

P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
First Time Visitors (%)	19.4	NA	21.5	20.7	19.3	18.2	16.4	16.3	0.2
Repeat Visitors (%)	80.6	NA	78.5	79.3	80.7	81.8	83.6	83.7	-0.2

P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
First Time Visitors (%)	41.5	NA	46.2	43.1	41.4	39.6	36.1	35.8	0.3
Repeat Visitors (%)	58.5	NA	53.8	56.9	58.6	60.4	63.9	64.2	-0.3

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.
P=Preliminary data. RP=March 2024 preliminary data were revised.

Tax Revenue

U.S. Total

U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	1,358.25	NA	1,437.81	1,885.03	1,835.32	1,834.51	498.50	455.04	9.6%

^{2/}State government tax revenue generated (direct, indirect, and induced).
P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. West

U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	811.48	NA	933.16	1,170.08	1,112.76	1,124.37	294.25	268.75	9.5%

^{2/}State government tax revenue generated (direct, indirect, and induced).
P=Preliminary data. RP=March 2024 preliminary data were revised.

U.S. East

U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	546.77	NA	504.66	714.95	722.56	710.14	204.26	186.30	9.6%

^{2/}State government tax revenue generated (direct, indirect, and induced).
P=Preliminary data. RP=March 2024 preliminary data were revised.