

# **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<sup>1/</sup>

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

							2025			
							Annual	YTD Mar.	YTD Mar.	
U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	Forecast*	2025P	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.

<sup>1/ 2024</sup>P and 2025P visitor data are preliminary. 2019 – 2023 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

							2025			
							Annual	YTD Mar.	YTD Mar.	
U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	Forecast*	2025P	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

							2025			
U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	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.

## **Contact Information**

Hawai'i Tourism Authority: Caroline Anderson, Director of Planning

Tel: (808) 973-2273 caroline@gohta.net

Hawai'i Tourism United States: Aaron Salā

Hawai'i Visitors & Convention Bureau 2270 Kalākaua Avenue, Suite 801

Honolulu, Hawai'i 96815 Telephone: (808) 923-1811

asala@hvcb.org

## **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

							YTD Mar.	YTD Mar.	%
U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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.

# U.S. West

							YTD Mar.	YTD Mar.	%
U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	2024RP	Change
O'ahu	2,005,506	582,276	2,005,024	2,426,014	2,447,883	2,508,024	591,457	580,044	2.0%
Maui County	1,641,441	438,612	1,546,151	1,682,959	1,372,048	1,330,543	331,473	296,856	11.7%
Maui	1,616,213	430,261	1,523,024	1,655,700	1,354,275	1,311,680	327,031	291,219	12.3%
Moloka'i	25,823	7,423	15,779	22,077	13,156	12,916	3,125	4,358	-28.3%
Lāna'i	31,672	7,968	26,221	31,446	20,760	20,307	4,654	5,239	-11.2%
Kaua'i	730,725	179,451	540,578	810,540	810,602	786,409	178,573	180,227	-0.9%
Island of Hawai'i	786,520	244,963	763,139	922,666	933,650	902,180	224,410	227,830	-1.5%

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

### U.S. East

							YTD Mar.	YTD Mar.	%
U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	2024RP	Change
O'ahu	1,321,001	385,083	1,137,006	1,407,627	1,474,790	1,459,346	371,072	362,737	2.3%
Maui County	847,188	233,393	693,244	876,274	747,619	698,666	207,043	178,956	15.7%
Maui	832,911	228,925	681,140	861,746	737,139	688,825	204,482	175,944	16.2%
Moloka'i	16,780	4,808	8,536	12,867	9,549	9,130	2,497	3,018	-17.3%
Lāna'i	28,138	6,559	19,148	24,331	17,539	15,699	4,282	4,287	-0.1%
Kaua'i	404,948	101,006	244,504	396,806	437,876	425,639	118,347	111,915	5.7%
Island of Hawai'i	464,651	134,191	374,017	515,089	537,882	520,833	146,275	137,646	6.3%

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

# **Airlift: Scheduled Seats and Flights**

Scheduled			2025					2024					%CHANGE		
seats	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	2,257,351	2,374,430	2,402,879	2,349,166	9,383,826	2,223,559	2,422,624	2,419,655	2,299,500	9,365,338	1.5	-2.0	-0.7	2.2	0.2
Anchorage	37,351	16,103	15,865	22,477	91,796	31,140	18,063	14,875	19,240	83,318	19.9	-10.9	6.7	16.8	10.2
Denver	128,924	151,400	131,268	124,268	535,860	130,108	131,968	118,452	120,220	500,748	-0.9	14.7	10.8	3.4	7.0
Everett	15,823	3,738		2,366	21,927	15,035	8,366		2,314	25,715	5.2	-55.3		2.2	-14.7
Las Vegas	165,941	189,895	196,867	202,992	755,695	156,005	180,193	170,569	157,349	664,116	6.4	5.4	15.4	29.0	13.8
Long Beach	50,092	50,498	50,876	50,876	202,342	37,793	51,331	52,248	50,876	192,248	32.5	-1.6	-2.6	0.0	5.3
Los Angeles	512,203	589,625	603,133	526,190	2,231,151	520,993	610,368	634,831	546,366	2,312,558	-1.7	-3.4	-5.0	-3.7	-3.5
Oakland	118,781	103,994	96,117	100,464	419,356	139,920	137,696	141,318	133,782	552,716	-15.1	-24.5	-32.0	-24.9	-24.1
Ontario	16,821	17,179	15,960	15,548	65,508	17,010	17,199	17,199	17,199	68,607	-1.1	-0.1	-7.2	-9.6	-4.5
Phoenix	148,199	148,037	142,448	138,136	576,820	167,759	147,768	136,331	141,441	593,299	-11.7	0.2	4.5	-2.3	-2.8
Portland	96,488	89,494	99,349	102,797	388,128	91,849	76,567	91,274	92,303	351,993	5.1	16.9	8.8	11.4	10.3
Sacramento	82,944	100,121	98,677	96,927	378,669	62,491	72,169	77,245	76,414	288,319	32.7	38.7	27.7	26.8	31.3
Salt Lake City	71,660	42,471	37,260	68,646	220,037	40,191	30,737	37,426	56,916	165,270	78.3	38.2	-0.4	20.6	33.1
San Diego	120,279	138,071	145,646	146,653	550,649	111,846	148,530	148,362	142,989	551,727	7.5	-7.0	-1.8	2.6	-0.2
San Francisco	257,081	304,738	329,297	308,679	1,199,795	282,510	318,759	330,008	300,429	1,231,706	-9.0	-4.4	-0.2	2.7	-2.6
San Jose	88,042	75,182	76,184	73,079	312,487	104,744	114,459	111,905	98,511	429,619	-15.9	-34.3	-31.9	-25.8	-27.3
Seattle	346,722	353,884	363,932	369,068	1,433,606	314,165	358,451	337,612	343,151	1,353,379	10.4	-1.3	7.8	7.6	5.9

Scheduled			2024					2023					%CHANGE		
flights	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
US WEST	10,842	11,342	11,591	11,236	45,011	10,626	11,650	11,705	11,068	45,049	2.0	-2.6	-1.0	1.5	-0.1
Anchorage	214	91	92	133	530	179	105	92	113	489	19.6	-13.3	0.0	17.7	8.4
Denver	411	465	435	423	1,734	422	455	422	400	1,699	-2.6	2.2	3.1	5.8	2.1
Everett	89	21		14	124	85	47		13	145	4.7	-55.3		7.7	-14.5
Las Vegas	778	908	905	936	3,527	743	846	783	730	3,102	4.7	7.3	15.6	28.2	13.7
Long Beach	272	274	276	276	1,098	207	279	284	276	1,046	31.4	-1.8	-2.8	0.0	5.0
Los Angeles	2,321	2,705	2,816	2,394	10,236	2,371	2,775	2,921	2,493	10,560	-2.1	-2.5	-3.6	-4.0	-3.1
Oakland	644	545	529	552	2,270	768	757	765	721	3,011	-16.1	-28.0	-30.8	-23.4	-24.6
Ontario	89	92	92	92	365	90	91	91	91	363	-1.1	1.1	1.1	1.1	0.6
Phoenix	715	735	708	686	2,844	823	736	670	682	2,911	-13.1	-0.1	5.7	0.6	-2.3
Portland	497	474	539	541	2,051	467	376	456	463	1,762	6.4	26.1	18.2	16.8	16.4
Sacramento	412	504	495	485	1,896	297	368	416	387	1,468	38.7	37.0	19.0	25.3	29.2
Salt Lake City	340	208	184	330	1,062	181	144	181	268	774	87.8	44.4	1.7	23.1	37.2
San Diego	630	741	777	783	2,931	582	795	787	758	2,922	8.2	-6.8	-1.3	3.3	0.3
San Francisco	1,108	1,338	1,476	1,330	5,252	1,200	1,349	1,401	1,310	5,260	-7.7	-0.8	5.4	1.5	-0.2
San Jose	489	422	428	409	1,748	587	641	627	549	2,404	-16.7	-34.2	-31.7	-25.5	-27.3
Seattle	1,833	1,819	1,839	1,852	7,343	1,624	1,886	1,809	1,814	7,133	12.9	-3.6	1.7	2.1	2.9

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

Scheduled seats			2024					2023					%CHANGE		
Scrieduled Seats	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		
Scrieduled Iligitis	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

							YTD Mar.	YTD Mar.	%
U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	2024RP	Change
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

							YTD Mar.	YTD Mar.	%
U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	2024RP	Change
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

							YTD Mar.	YTD Mar.	%
U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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

							YTD Mar.	YTD Mar.	%
U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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

							YTD Mar.	YTD Mar.	%
U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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

							YTD Mar.	YTD Mar.	%
U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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

							YTD Mar.	YTD Mar.	%
U.S. TOTAL (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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%

<sup>2&#</sup>x27;State government tax revenue generated (direct, indirect, and induced). P=Preliminary data. RP=March 2024 preliminary data were revised.

## U.S. West

							YTD Mar.	YTD Mar.	%
U.S. WEST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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%

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

## U.S. East

							YTD Mar.	YTD Mar.	%
U.S. EAST MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025P	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%

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