Trends & Insights

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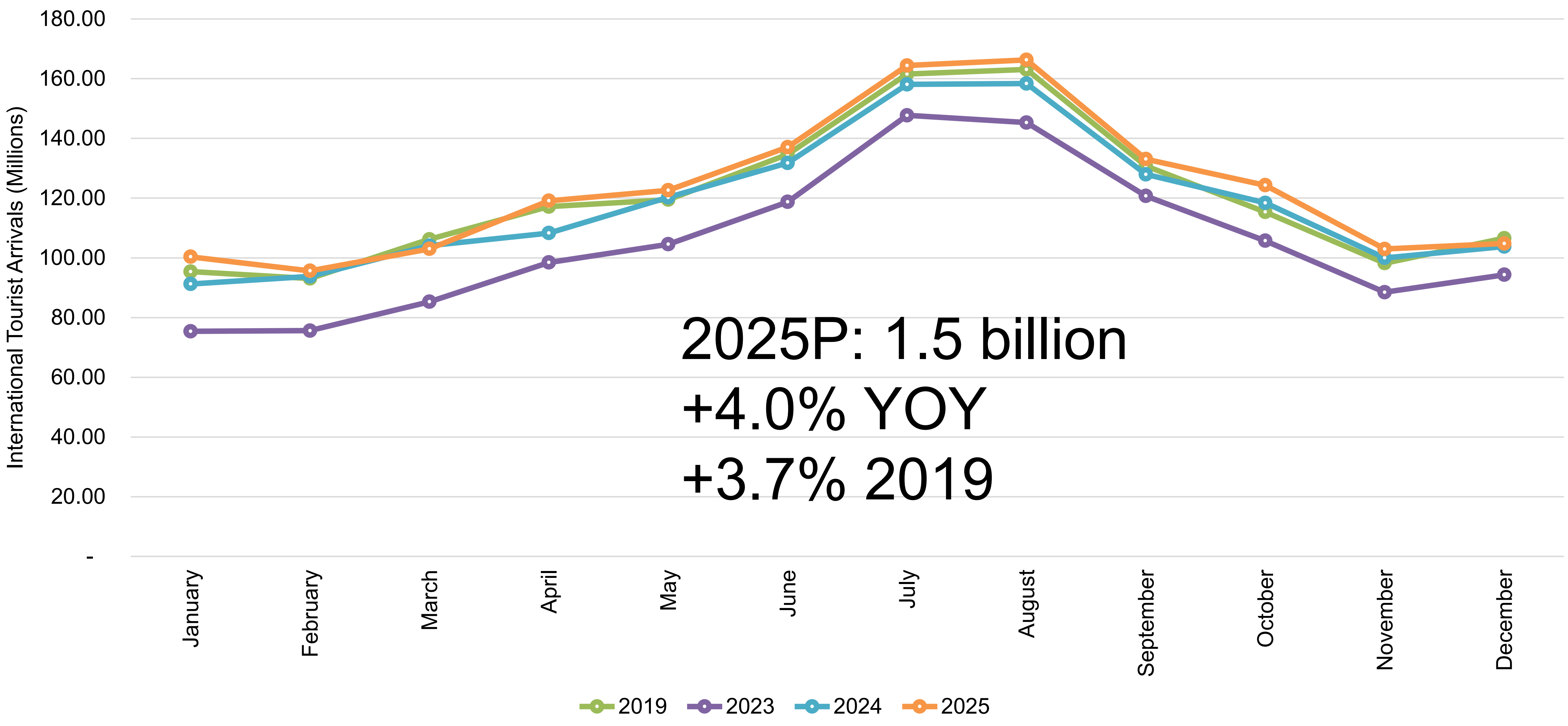
STATE OF HAWAI'I • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

2026 Spring Tourism Update

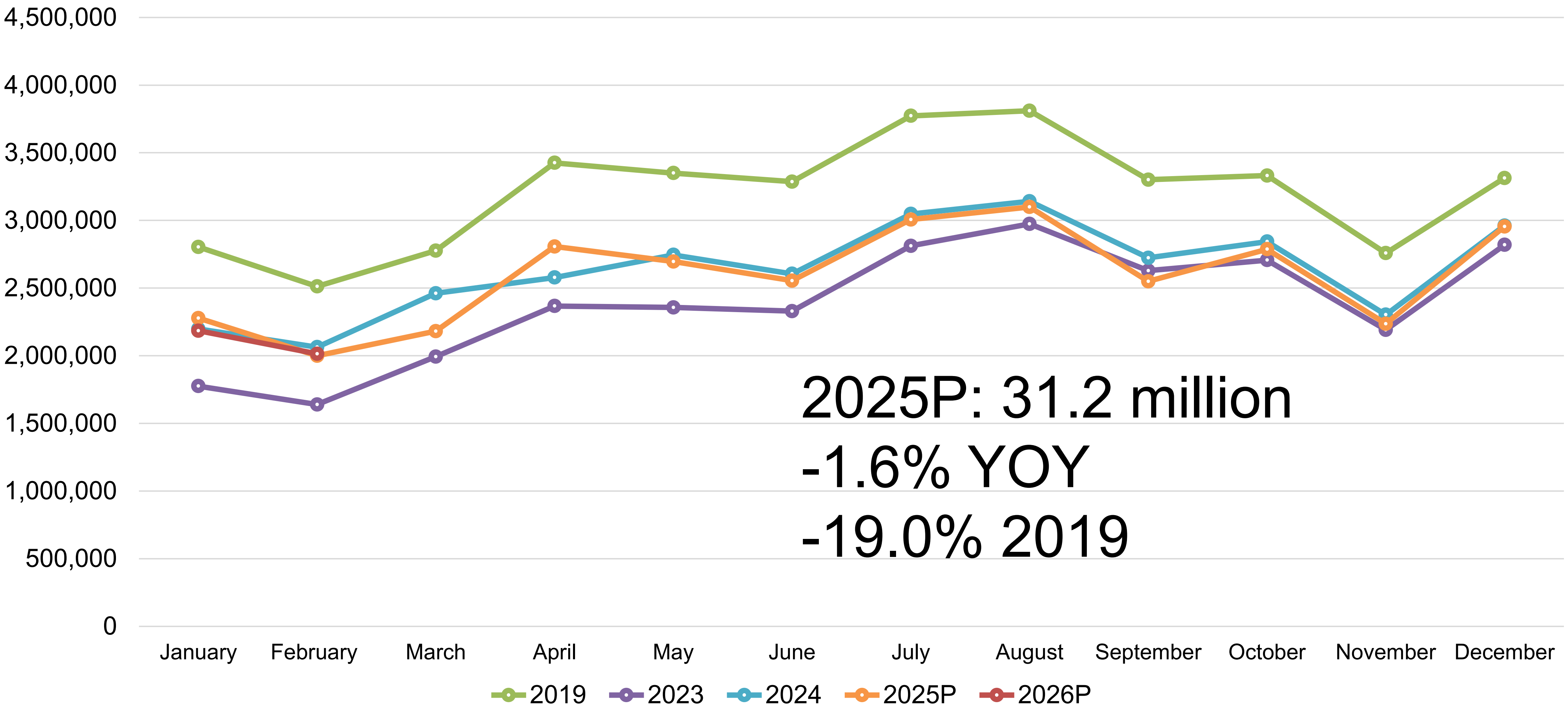
HAWAI'I TOURISM AUTHORITY

UN Tourism International Tourism Arrivals



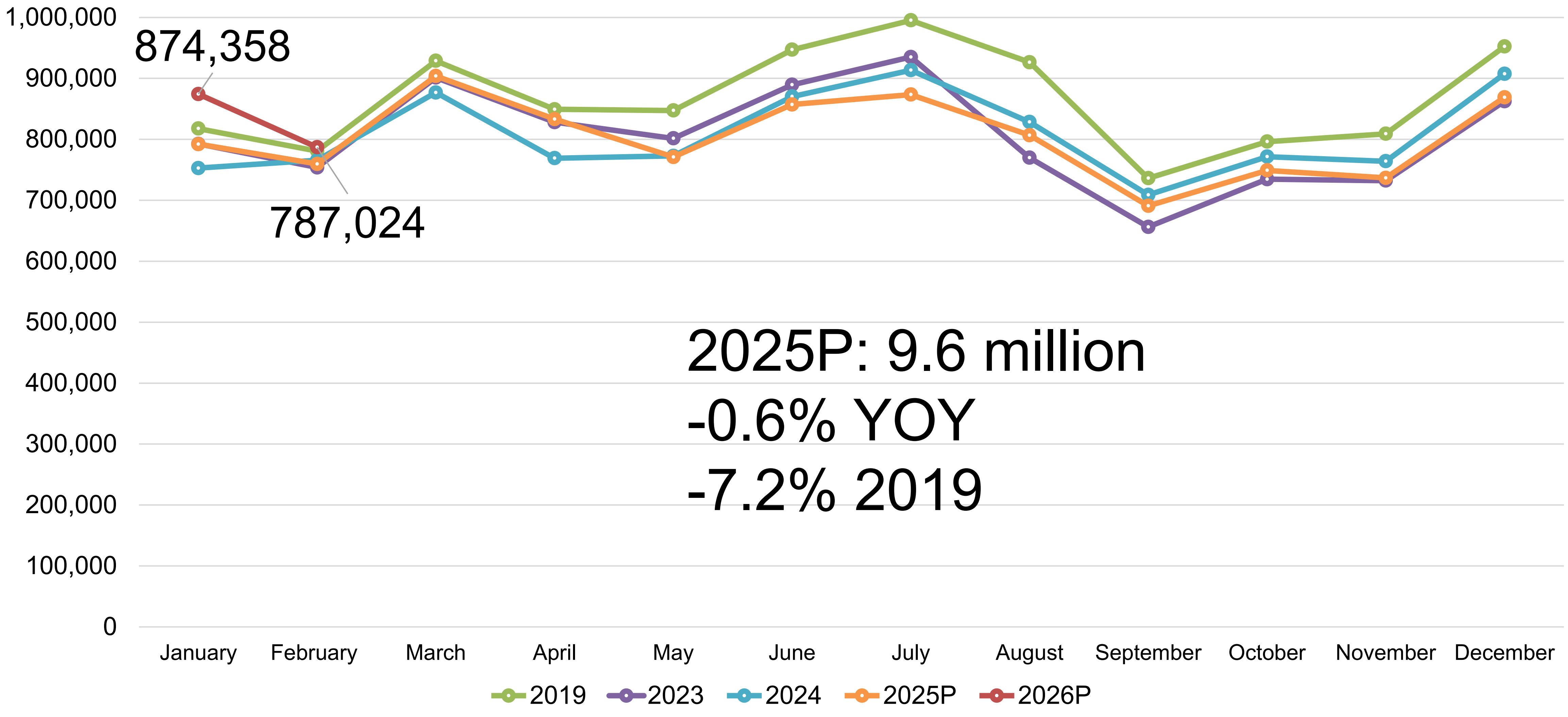
Source: United Nations World Tourism Organization, as of 2025

International Arrivals by Air to the U.S.



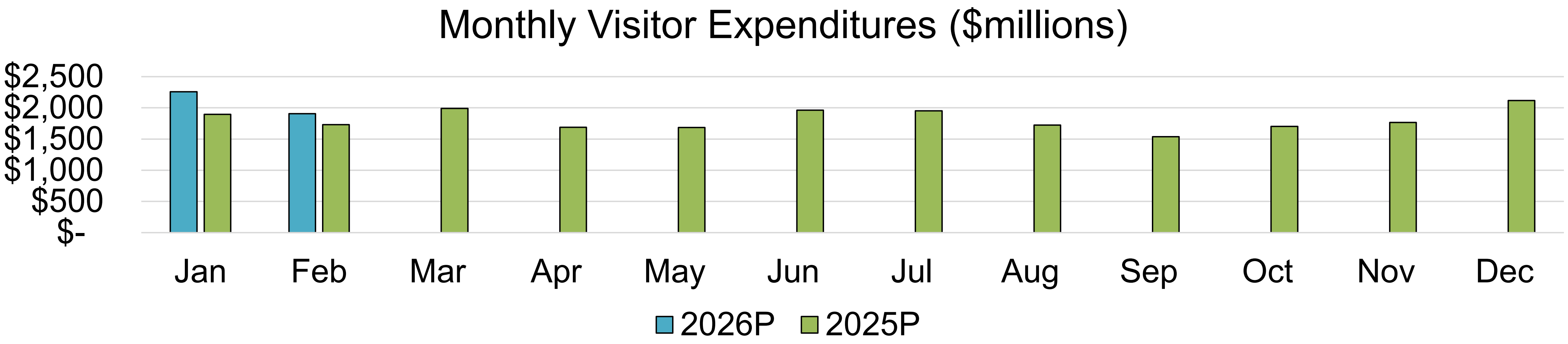
Source: National Travel and Tourism Office I-94 COR

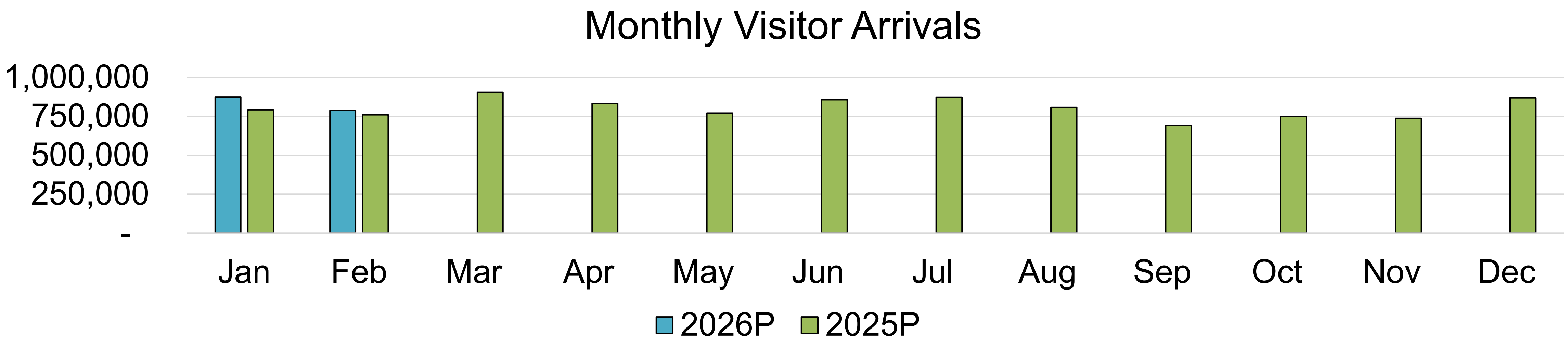
Visitor Arrivals to Hawai‘i



Note: 2025 and 2026 figures are preliminary.

YTD February 2026 Highlights – Expenditures and Arrivals





Note: 2025 and 2026 figures are preliminary.

YTD February 2026 Highlights by Market

EXPENDITURES ($mil.)	2026P	2025P	% Change
TOTAL (AIR)	4,145.8	3,609.5	12,026.9
U.S. West	1,928.8	1,605.5	4,685.8
U.S. East	1,366.3	1,140.9	3,299.0
Japan	157.2	151.4	1,455.9
Canada	279.0	289.7	750.1
All Others	414.6	422.1	1,836.0

PPPD SPENDING ($)	2026P	2025P	% Change
TOTAL (AIR)	279.9	254.1	195.2
U.S. West	273.3	246.5	173.0
U.S. East	313.8	270.7	209.3
Japan	246.8	246.0	237.8
Canada	224.5	232.4	166.3
All Others	272.2	261.6	225.9

VISITOR ARRIVALS	2026P	2025P	% Change
TOTAL (AIR)	1,619,483	1,512,841	7,015,773
U.S. West	797,041	739,111	3,141,739
U.S. East	465,674	406,504	1,629,517
Japan	109,109	102,328	1,029,549
Canada	96,009	102,984	371,146
All Others	151,651	161,913	843,822

AVERAGE DAILY CENSUS	2026P	2025P	% Change
TOTAL (AIR)	251,078	240,751	253,544
U.S. West	119,614	110,406	111,478
U.S. East	73,792	71,438	64,864
Japan	10,792	10,430	25,190
Canada	21,063	21,126	18,560
All Others	25,818	27,352	33,452

Note: 2025 and 2026 figures are preliminary.

YTD February 2026 Highlights by Island

EXPENDITURES ($mil.)	2026P	2025P	% Change
O‘ahu	1,674.8	1,447.7	732.0
Maui	1,236.2	1,069.9	404.7
Moloka‘i	5.2	6.8	1.7
Lāna‘i	8.7	17.5	12.4
Kaua‘i	539.5	488.1	159.0
Hawai‘i Island	681.4	579.6	193.1

PPPD SPENDING ($)	2026P	2025P	% Change
O‘ahu	244.7	222.8	187.1
Maui	326.2	310.4	202.2
Moloka‘i	171.3	202.3	105.3
Lāna‘i	711.5	627.8	512.8
Kaua‘i	312.9	290.8	190.9
Hawai‘i Island	282.5	230.0	183.2

VISITOR ARRIVALS	2026P	2025P	% Change
O‘ahu	963,997	888,627	575,070
Maui	459,407	402,622	273,638
Moloka‘i	3,295	5,178	4,860
Lāna‘i	3,284	7,690	7,739
Kaua‘i	234,309	216,138	120,030
Hawai‘i Island	307,133	301,280	157,544

AVERAGE DAILY CENSUS	2026P	2025P	% Change
O‘ahu	116,018	110,122	126,206
Maui	64,241	58,420	64,553
Moloka‘i	518	566	523
Lāna‘i	207	471	779
Kaua‘i	29,217	28,449	26,865
Hawai‘i Island	40,877	42,722	33,989

Note: 2025 and 2026 figures are preliminary.

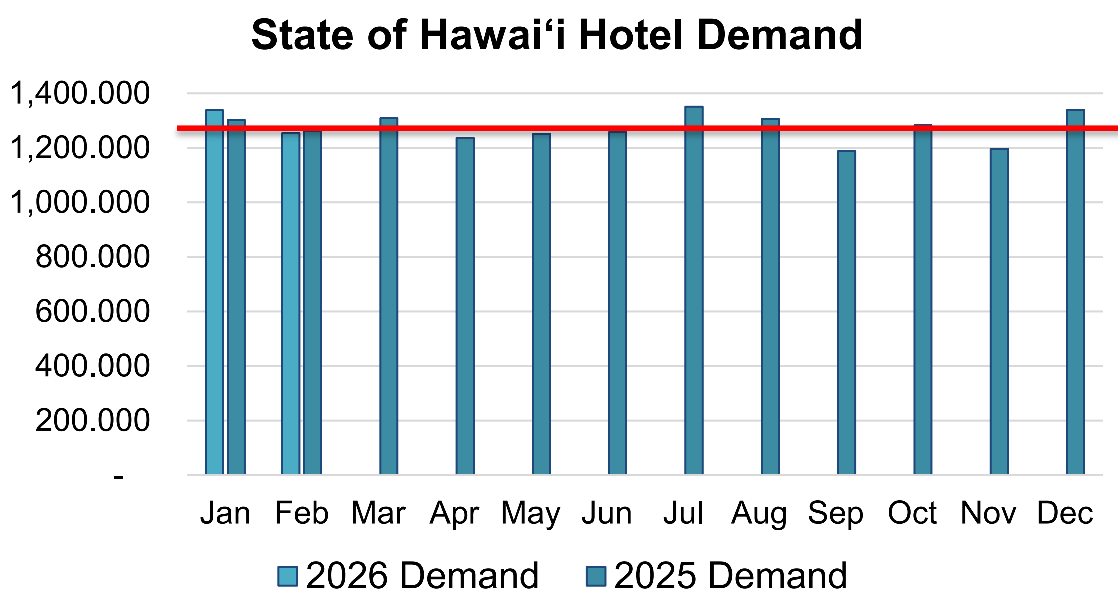
YTD February 2026 Highlights - Lodging

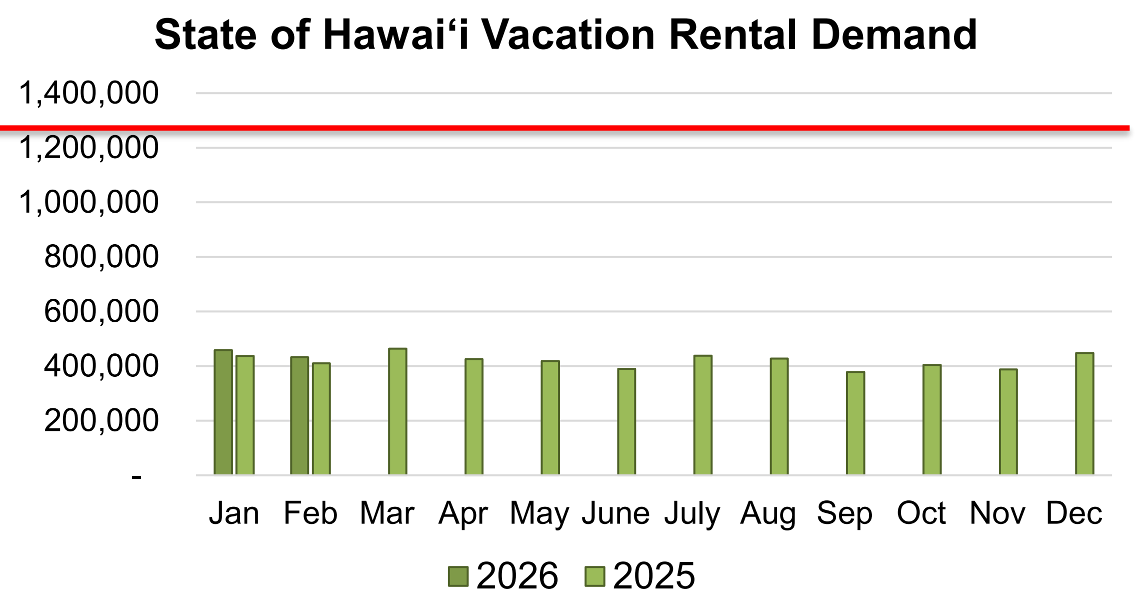
State of Hawai‘i Hotel Performance

	2026	2025	Change
Occupancy	77.2%	76.4%	0.8%
ADR	$383	$380	0.8%
RevPAR	$296	$291	1.8%

State of Hawai‘i Vacation Rental Performance

	2026	2025	Change
Occupancy	58.7%	61.0%	-3.8%
ADR	$535	$572	-6.4%

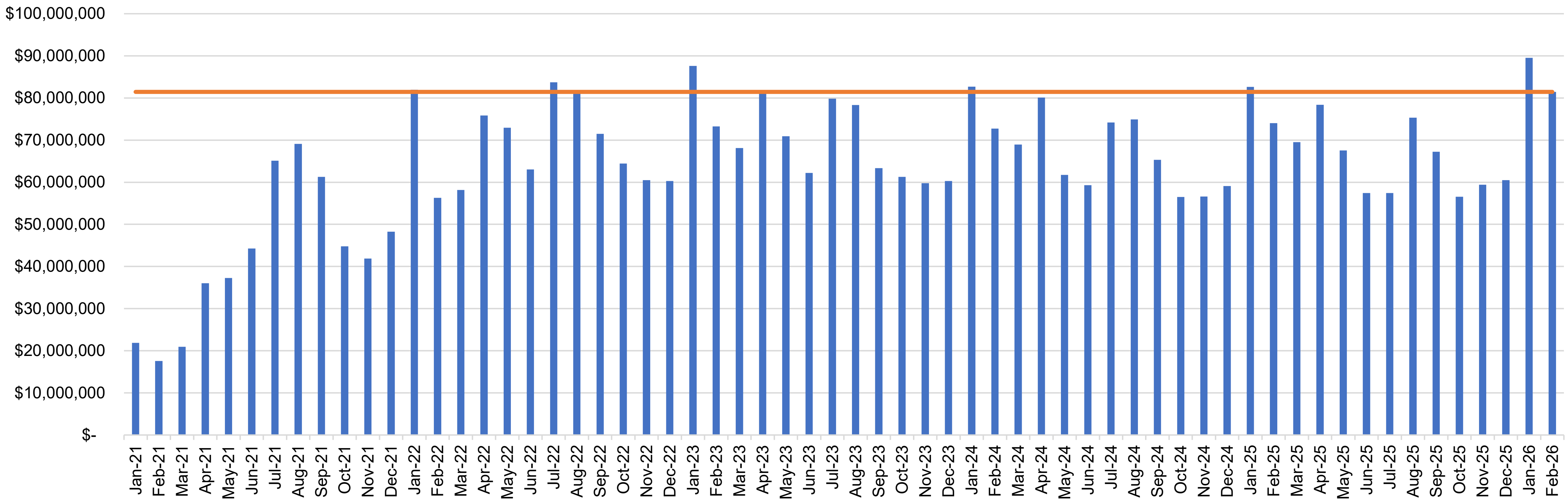




Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism; Lighthouse Intelligence, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

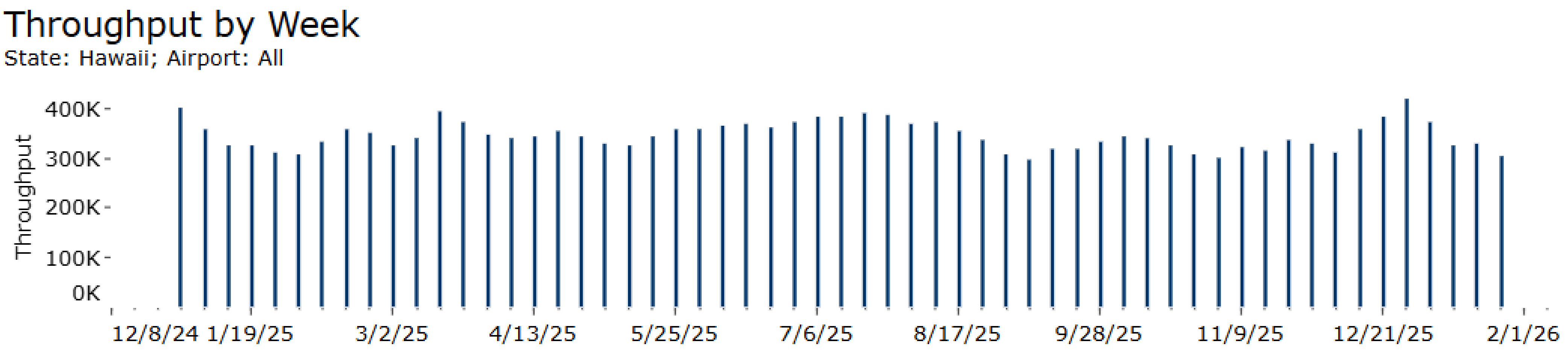
YTD February 2026 Highlights - State TAT Collections

- Preliminary YTD Fiscal 26 TAT Collections: $547.4 million (+0.8%)
- YTD Fiscal 25 TAT Collections: $543.4 million (+4.1million)



Source: Department of Taxation

February 2026 Highlights – Hawai‘i Airport Throughput



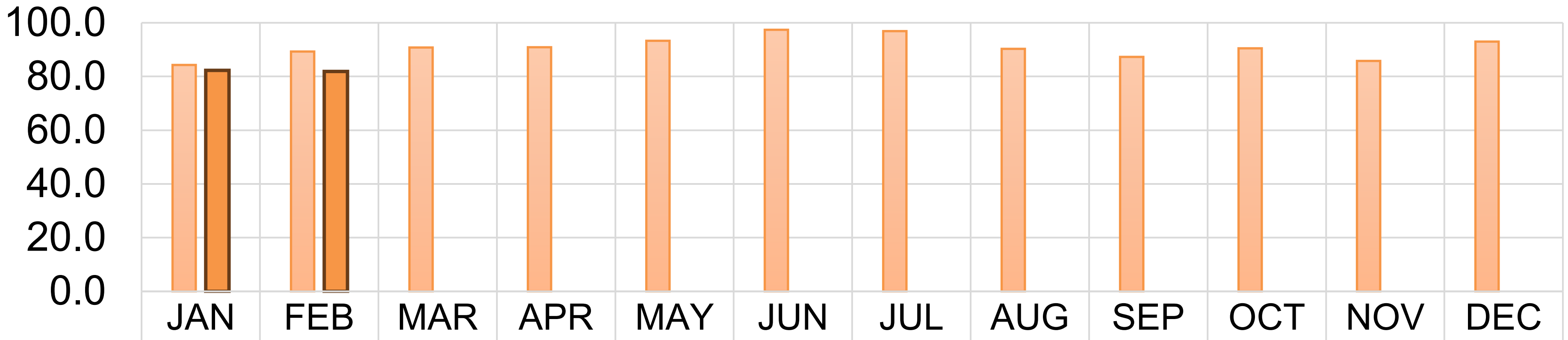
Hawaii Airports

Throughput for the last 6 months, % change compared to 2025

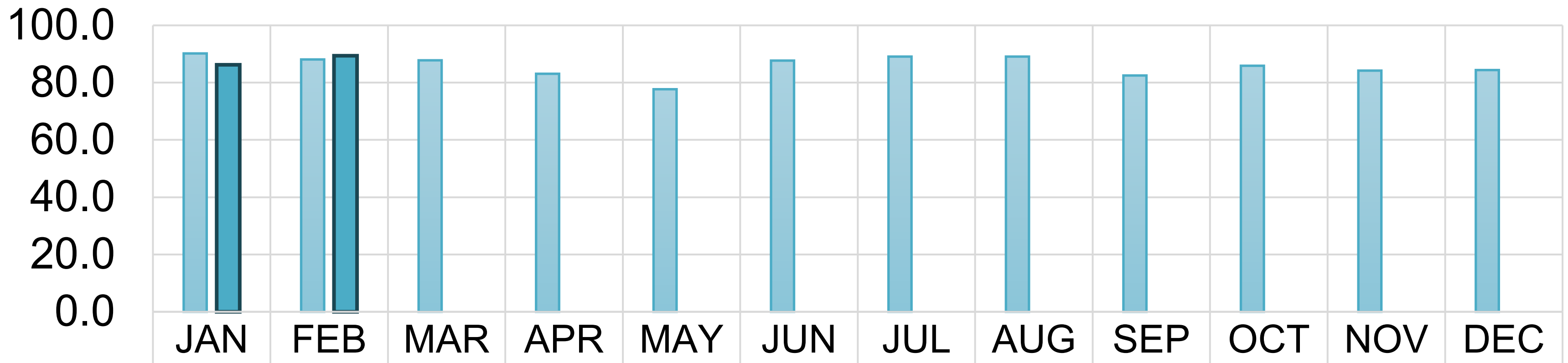
	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
All Airports	1%	0%	3%	0%	2%	1%
Daniel K. Inouye International Airport	0%	0%	2%	1%	2%	0%
Kahului	5%	3%	6%	2%	3%	5%
Ellison Onizuka Kona International Airport	-4%	-5%	-2%	-4%	0%	-2%
Lihue	6%	4%	6%	1%	2%	2%
Hilo International	3%	5%	9%	4%	6%	0%

Source: Transportation Security Administration by Tourism Economics

YTD February 2026 Highlights – Load Factors



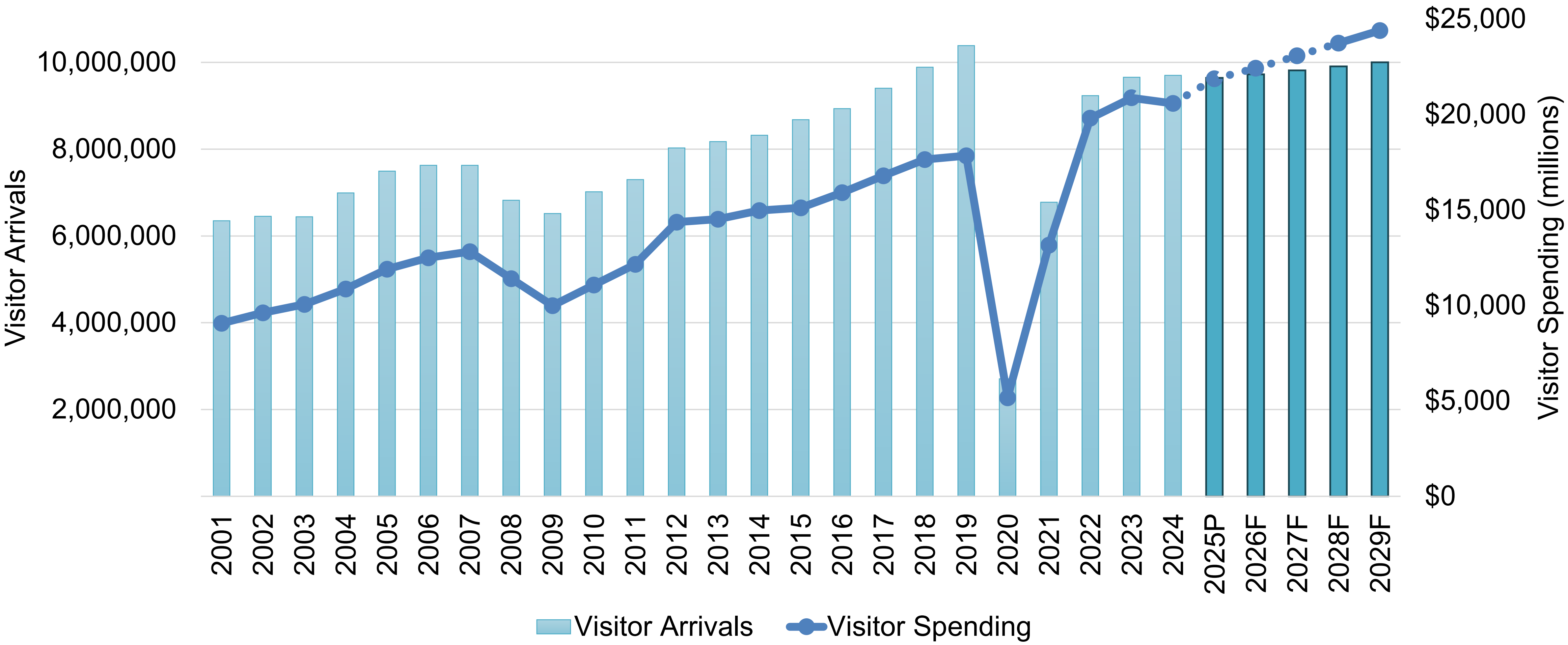
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
DOMESTIC FLIGHTS 2025P	84.3	89.3	90.8	90.9	93.3	97.4	96.9	90.3	87.3	90.5	85.8	93.0
DOMESTIC FLIGHTS 2026P	82.3	81.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
INTERNATIONAL FLIGHTS 2025P	90.2	88.1	87.8	83.1	77.7	87.7	89.1	89.1	82.5	85.9	84.2	84.4
INTERNATIONAL FLIGHTS 2026P	86.2	89.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: 2025 and 2026 figures are preliminary.

DBEDT Tourism Forecast



Source: DBEDT, Q1 2026 Forecast, published March 12, 2026

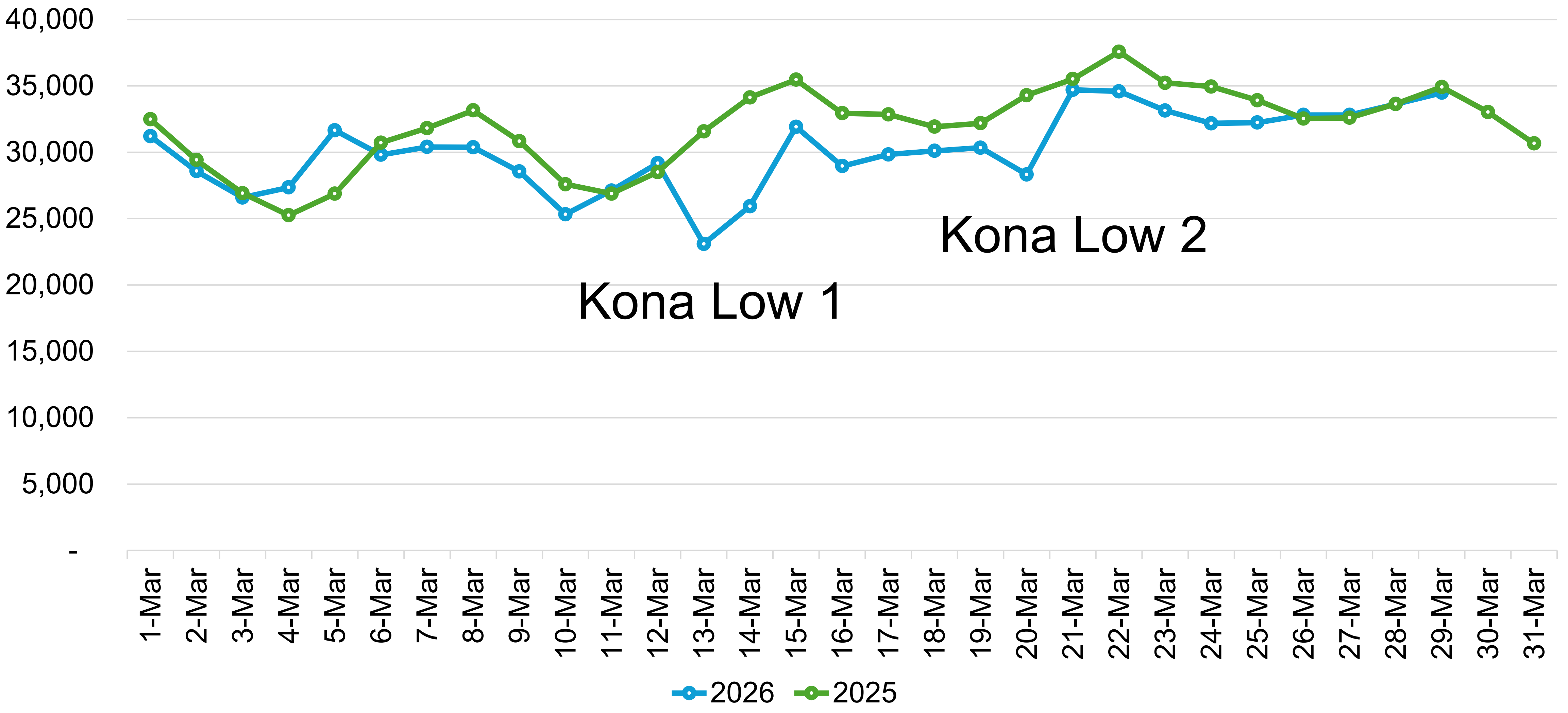
State of Hawai‘i Hotel Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	73.3%	-1.2%	▼	$363.57	-3.0%	▼	$266.51	-4.5%	▼
2025	73.8%	0.5%	▲	$366.[illegible]0	0.8%	▲	$[illegible]70.46	1.5%	▲
2026F	73.8%	[illegible].0%	▼	$366.81	0.[illegible]%	▲	$270.70	0.1%	▲
2027F	74.2%	0.4%	▲	$370.52	1.0%	▲	$274.87	1.5%	▲

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

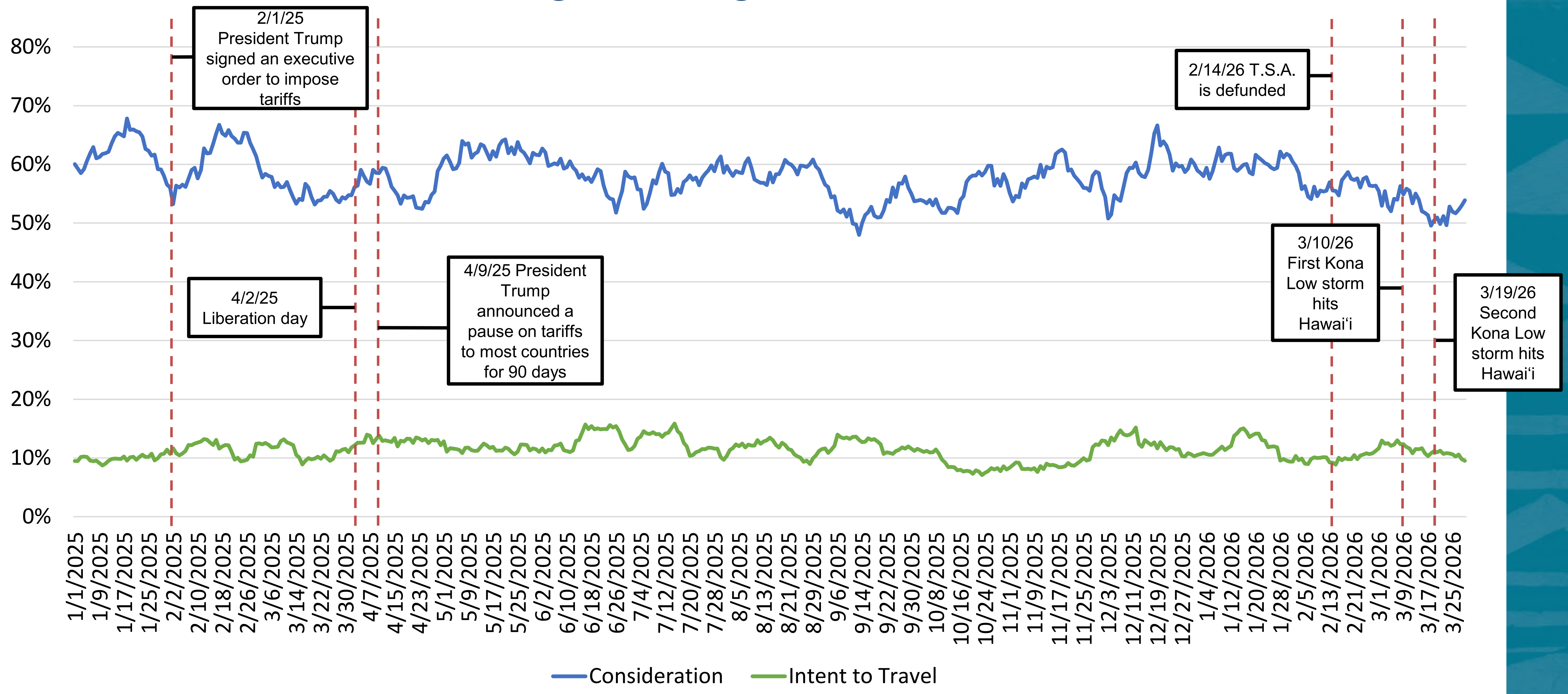
DBEDT HAWAI‘I TOURISM AUTHORITY

March 2026 Daily Passenger Counts



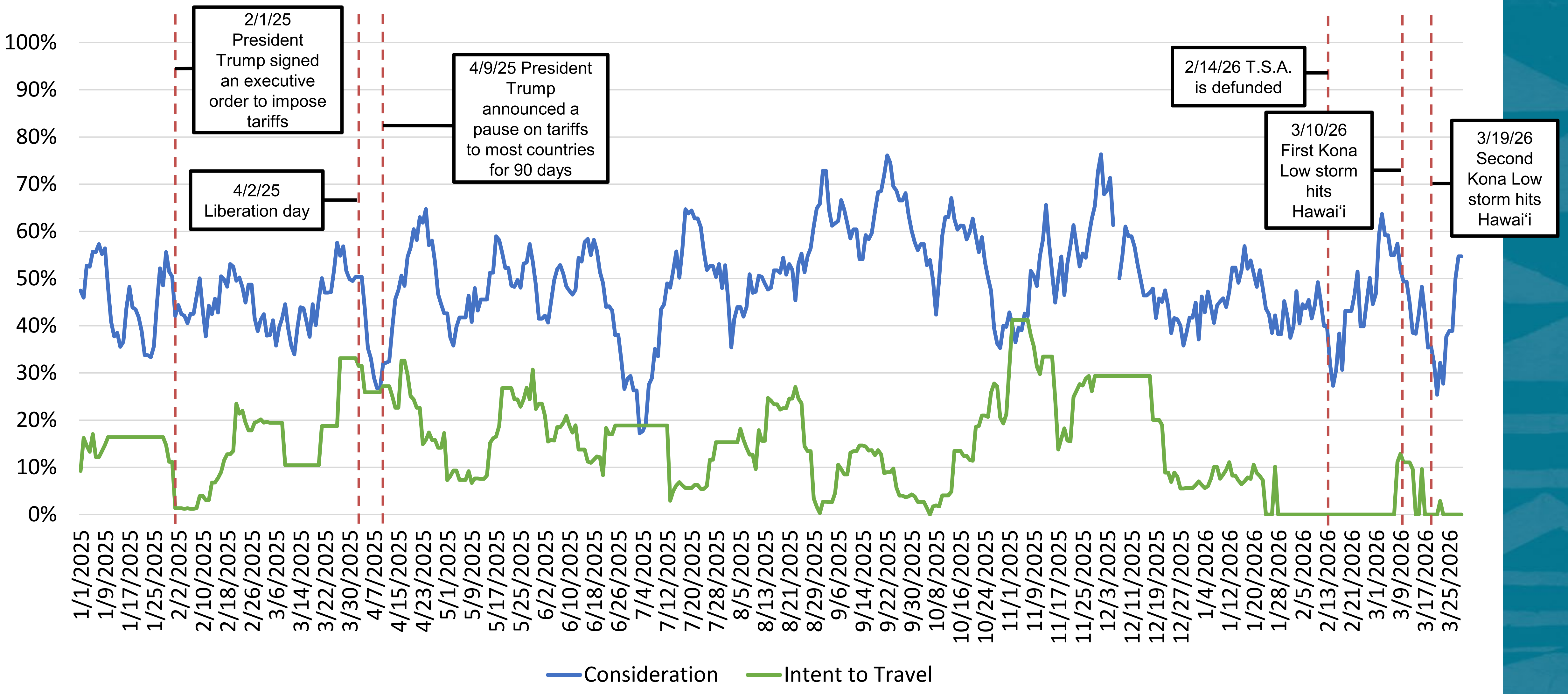
Source: DBEDT https://dbedt.hawaii.gov/economic/daily-passenger-counts/

State of Hawai‘i – Consideration and Intent to Travel U.S. Two-Week Moving Average



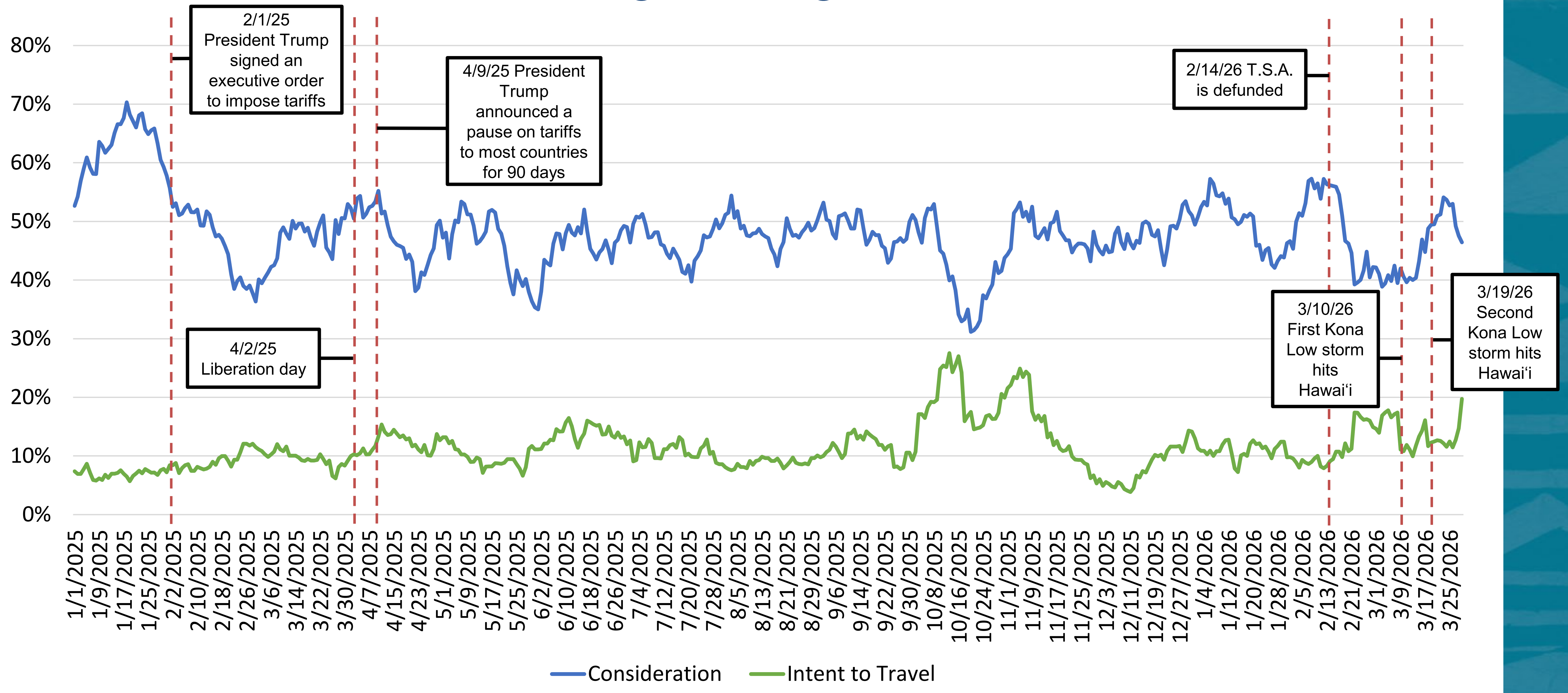
Source: Vision Insights Data as of April 1, 2026

State of Hawai‘i – Consideration and Intent to Travel Japan Two-Week Moving Average



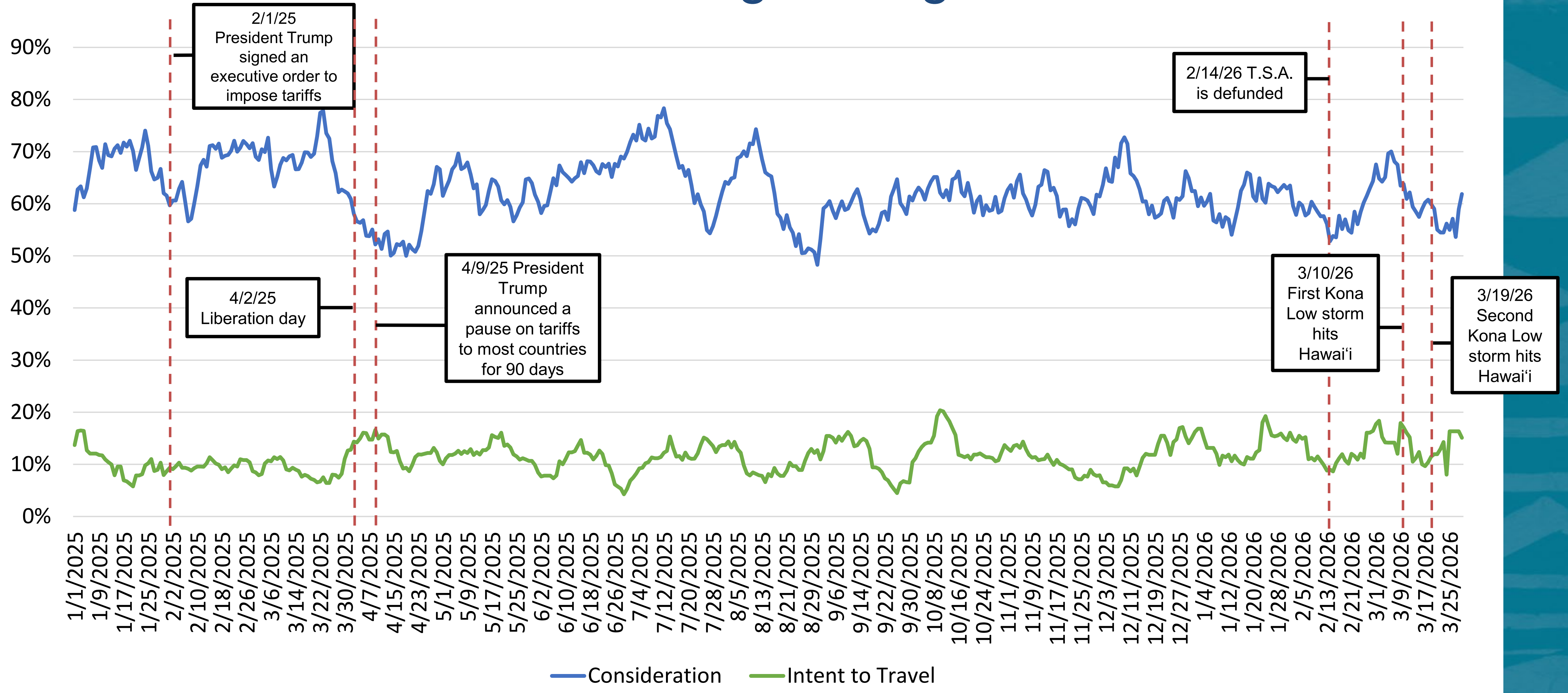
Source: Vision Insights Data as of April 1, 2026

State of Hawaiʻi – Consideration and Intent to Travel Canada Two-Week Moving Average



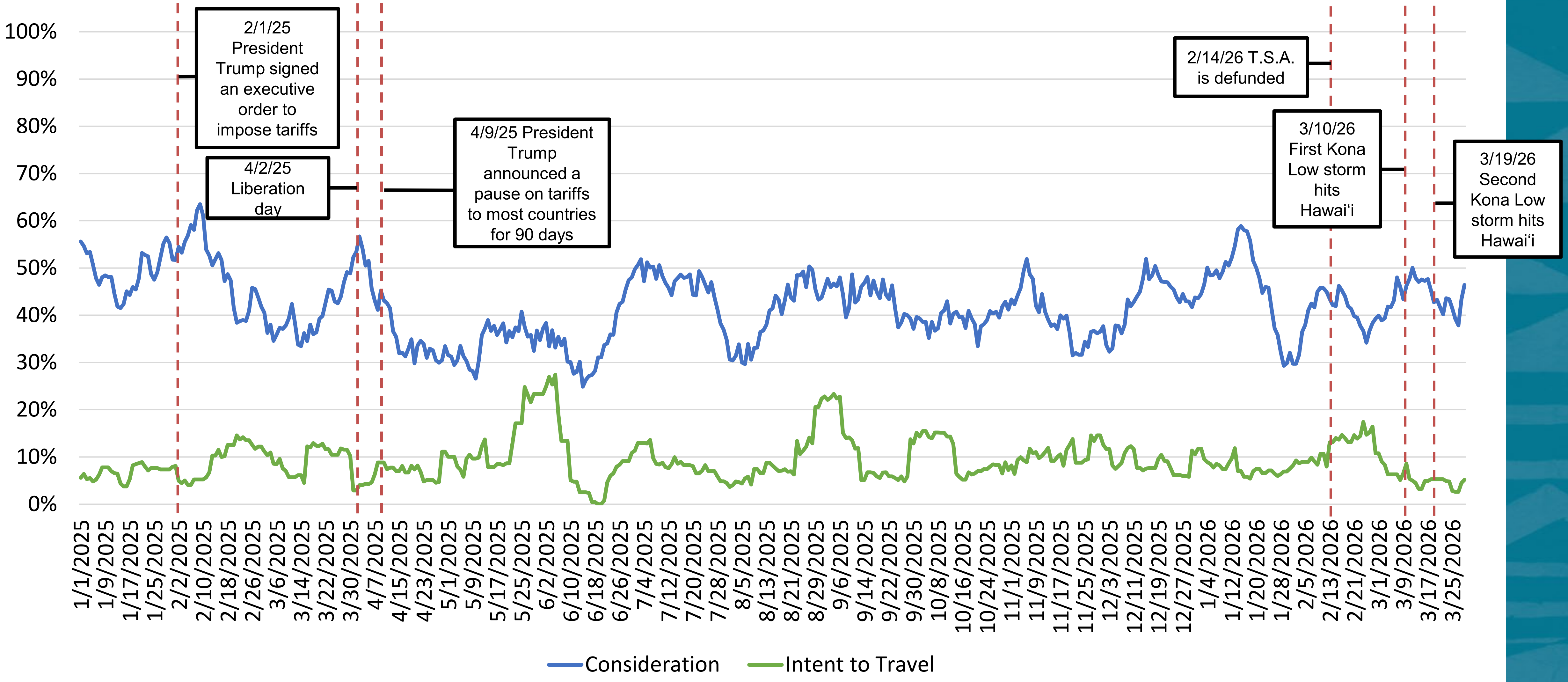
Source: Vision Insights Data as of April 1, 2026

State of Hawai‘i – Consideration and Intent to Travel South Korea Two-Week Moving Average



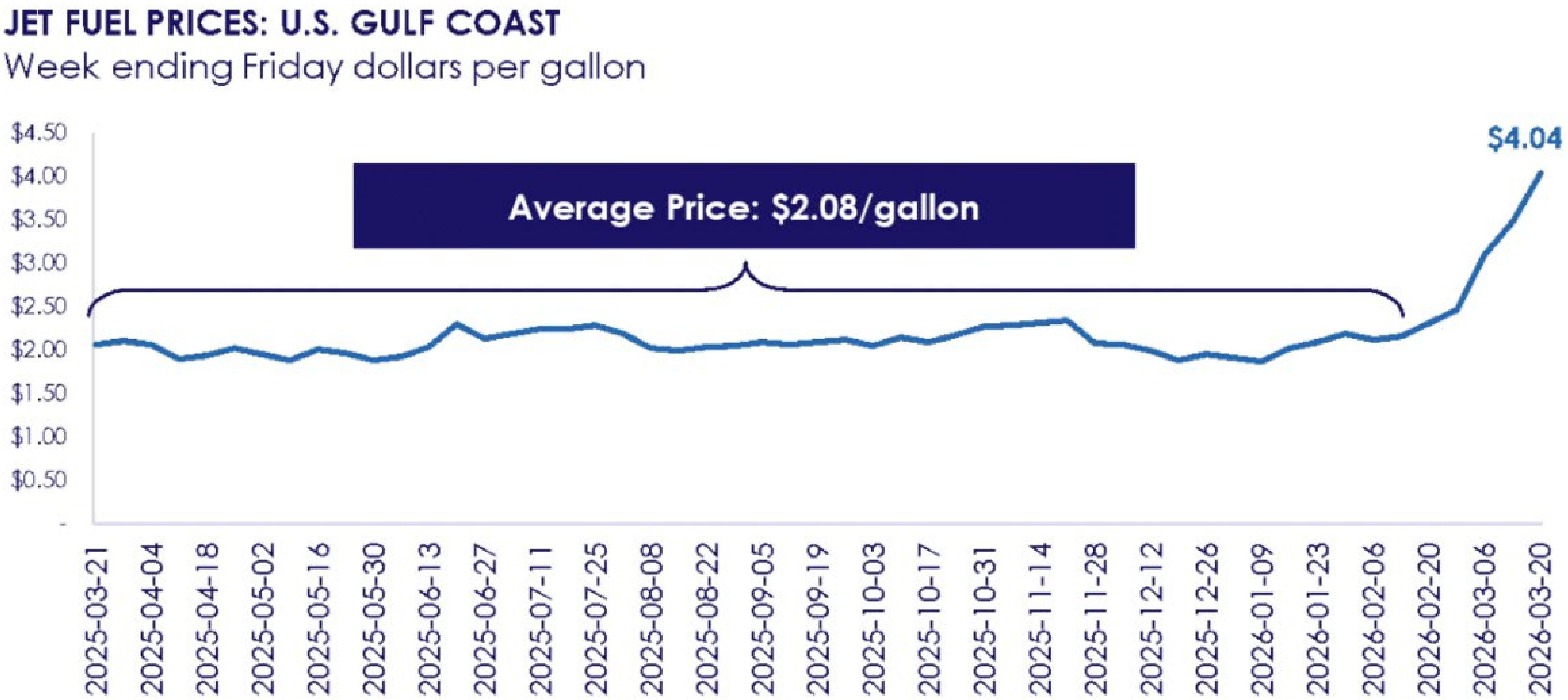
Source: Vision Insights Data as of April 1, 2026

State of Hawai'i – Consideration and Intent to Travel Australia Two-Week Moving Average



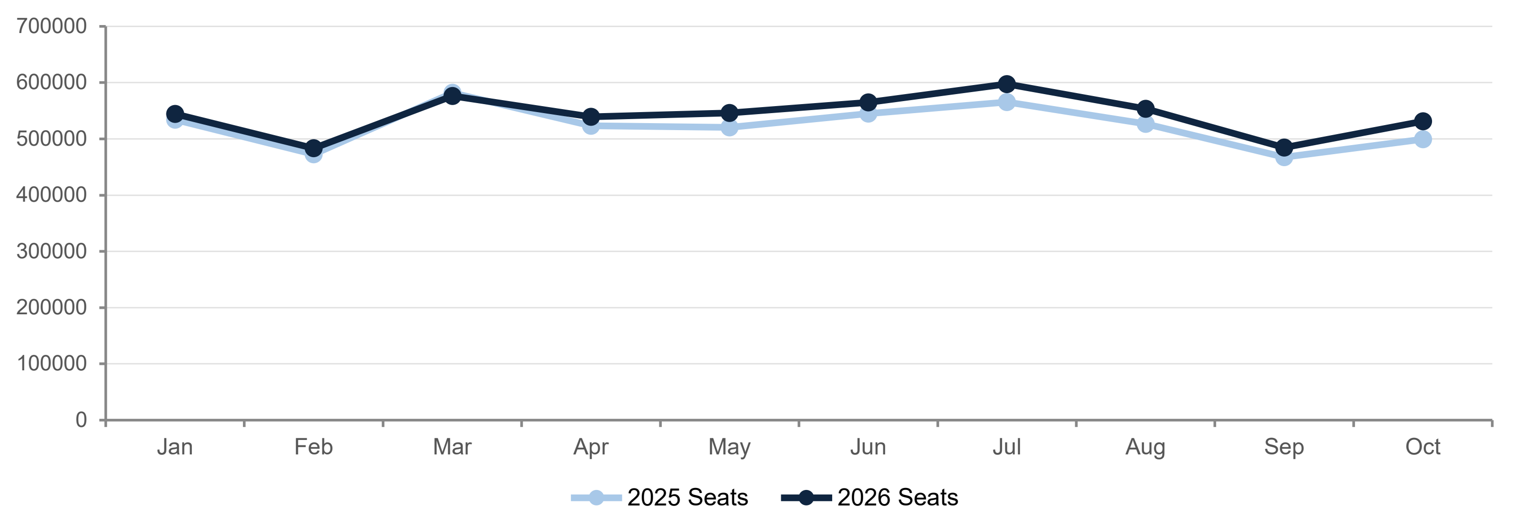
Source: Vision Insights Data as of April 1, 2026

Jet Fuel Prices Surge to $4.04/Gallon — Nearly Double the 12-Month Average



Air Capacity to Honolulu (HNL) — Domestic | Jan–Oct 2025 vs. 2026

Monthly Scheduled Seats — 2025 vs. 2026



+1.9%

Jan 2026 YoY Domestic Seat Growth

+6.5%

Oct 2026 YoY — Strongest Domestic Month

New

BUR–HNL (AS & WN)
ONT–HNL (WN)
BOS –HNL (DL)

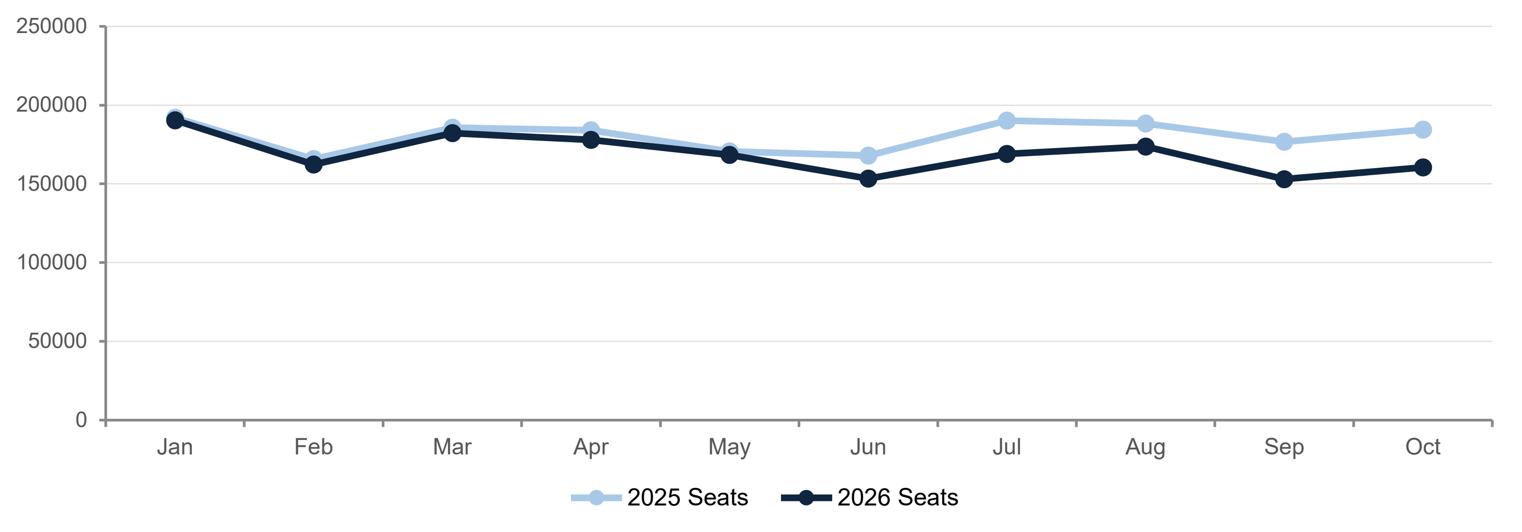
TOP CARRIER MARKETS — JAN 2026 DOMESTIC SEATS TO HNL

Origin – Carrier	Jan 2026	Jan 2025	YoY Chg
SEA – Alaska Airlines (AS) (HA)	45,470	27,514	+65.3%
SFO – United Airlines (UA)	37,002	37,121	-0.3%
LAX – Alaska/Hawaiian (HA)	31,457	33,425	-5.9%
LAX – Delta Air Lines (DL)	20,088	20,088	+0.0%
LAX – United Airlines (UA)	25,803	25,376	+1.7%

KEY INSIGHT: HNL domestic capacity expands modestly but consistently in 2026 (+2–7% YoY). Alaska Airlines drives outsized share gains via LAS (new), LAX (right sizing), and SAN. Mar 2026 shows a lone dip (-0.9%), likely calendar-driven. Late-season acceleration (Sep–Oct: +4–7%) is a positive signal for shoulder period performance.

Air Capacity to Honolulu (HNL) — International | Jan–Oct 2025 vs. 2026

Monthly Scheduled Seats — 2025 vs. 2026



-0.8%

Jan 2026 YoY Intl Seat Growth

-13.4%

Sep 2026 YoY — Peak Contraction Month

New

ICN–HNL (Air Premia)

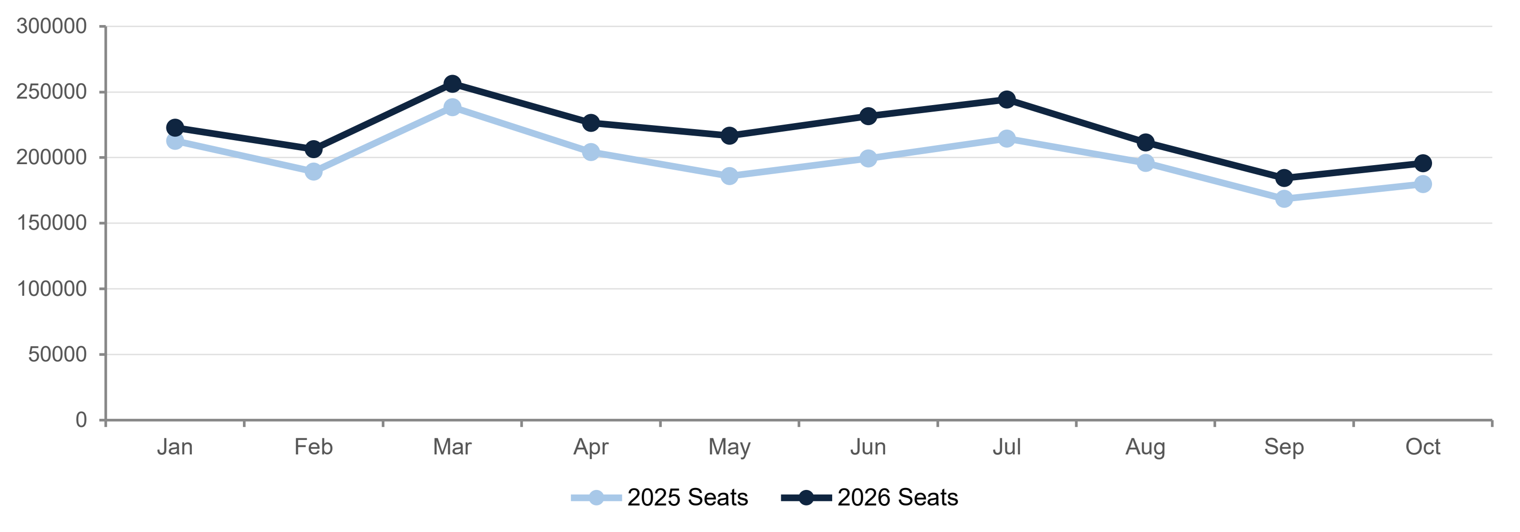
TOP CARRIER MARKETS — JAN 2026 INTL SEATS TO HNL

Origin – Carrier	Jan 2026	Jan 2025	YoY Chg
NRT – ANA	32,240	26,000	+24.0%
ICN – Air Premia ★ NEW	—	—	NEW
HND – JAL	14,828	14,828	+0.0%
GUM – United Airlines (UA)	10,850	10,850	+0.0%
YVR – Air Canada	10,478	10,478	+0.0%

KEY INSIGHT: International capacity to HNL contracts meaningfully in 2026, with Jul–Oct down 8–13% YoY despite new AS HND and Air Premia ICN services. ANA NRT expansion (+24% Jan) is the primary bright spot. Structural softness in Korean and Pacific-rim routes is the key risk to international arrivals forecasts; warrants urgent carrier-level engagement.

Air Capacity to Kahului (OGG) — Jan–Oct 2025 vs. 2026

Monthly Scheduled Seats — 2025 vs. 2026



TOP CARRIER MARKETS — JAN 2026 SEATS TO OGG

Origin – Carrier	Jan 2026	Jan 2025	YoY Chg
SEA – Alaska Airlines (AS) (HA)	23,748	16,516	+43.8%
DFW – American Airlines (AA)	16,107	8,463	+90.3%
SFO – United Airlines (UA)	13,772	12,261	+12.3%
DEN – United Airlines (UA)	11,460	11,460	+0.0%
SAN – Alaska Airlines (AS) (HA)	10,410	5,499	+89.3%
PDX – Alaska Airlines (AS) (HA)	9,973	5,518	+80.7%

+4.7%

Jan 2026 YoY Seat Growth

+16.6%

May 2026 YoY — Peak Growth Month

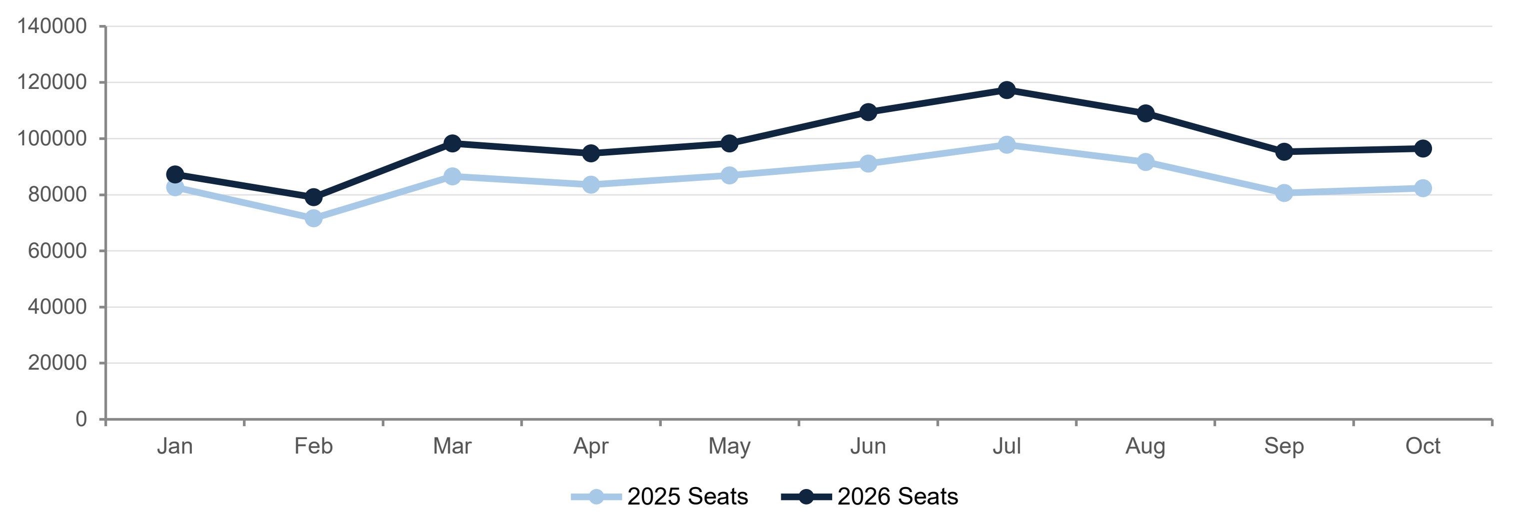
New

SAN–OGG (WN Southwest) — New 2026

KEY INSIGHT: OGG is Hawaiʻi's highest-growth airport in 2026 — every month positive, no exceptions. Summer surge is pronounced (+14–17% YoY, May–Jul). DFW corridor nearly doubled YoY (Jan +90%), and Alaska's SAN/PDX expansion adds new feeder markets. All growth is domestic. A strong seat supply story heading into peak leisure season.

Air Capacity to Līhuʻe (LIH) — Jan–Oct 2025 vs. 2026

Monthly Scheduled Seats — 2025 vs. 2026



TOP CARRIER MARKETS — JAN 2026 SEATS TO LIH

Origin – Carrier	Jan 2026	Jan 2025	YoY Chg
SEA – Alaska Airlines (AS) (HA)	9,858	9,858	+0.0%
SFO – United Airlines (UA)	7,470	6,142	+21.6%
PHX – American Airlines (AA)	7,056	7,252	-2.7%
LAX – American Airlines (AA)	6,076	6,076	+0.0%
SEA – Delta Air Lines (DL)	5,989	6,163	-2.8%
LAX – Delta Air Lines (DL)	5,989	6,019	-0.5%

+5.6%

Jan 2026 YoY Seat Growth

+20.0%

Jun–Jul 2026 YoY — Peak Summer Growth

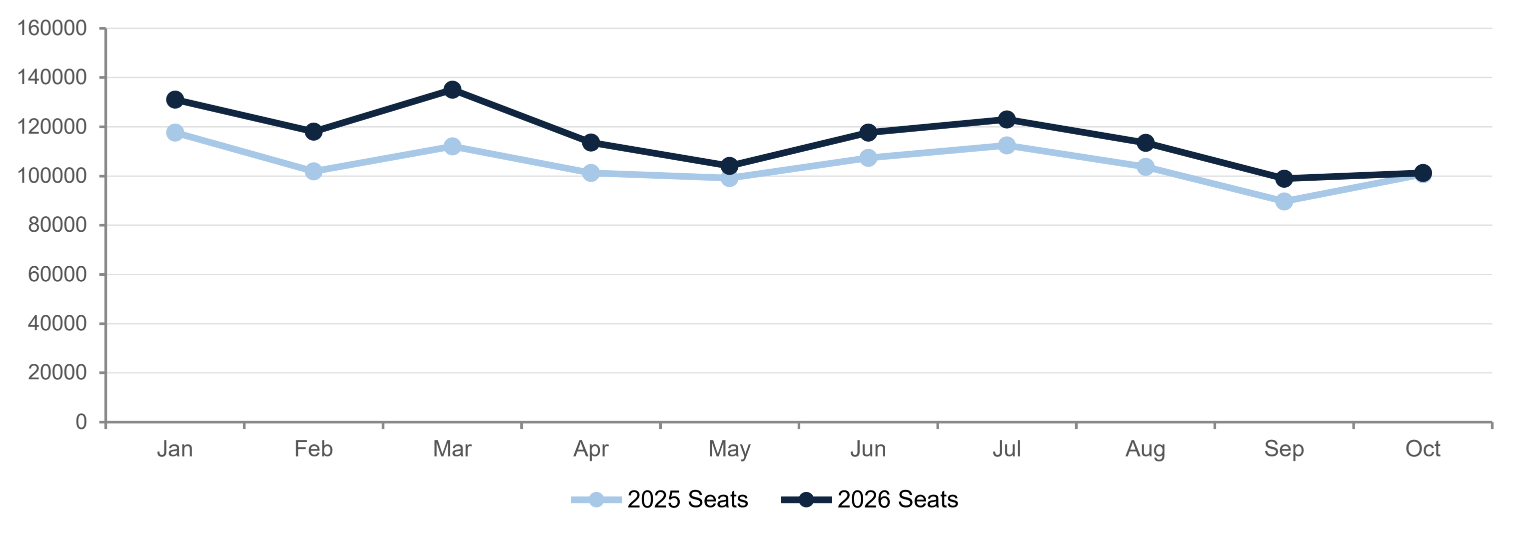
+17.1%

Oct 2026 YoY — Sustained Late-Season Strength

KEY INSIGHT: LIH shows the most consistent and sustained growth trajectory statewide — every month positive, accelerating from +5.6% (Jan) to +20% (Jun–Jul) and holding +17% into Oct. No new routes identified; growth is entirely frequency-driven by existing carriers — a strong signal of underlying demand confidence from AA, AS, DL, and UA alike.

Air Capacity to Kona (KOA) — Jan–Oct 2025 vs. 2026

Monthly Scheduled Seats — 2025 vs. 2026



+11.4%

Jan 2026 YoY Seat Growth

+20.6%

Mar 2026 YoY Growth — Peak Month

New

DFW–KOA (AA) — New Service 2026

TOP CARRIER MARKETS — JAN 2026 SEATS TO KOA

Origin – Carrier	Jan 2026	Jan 2025	YoY Chg
SEA – Alaska Airlines (AS) (HA)	16,535	16,497	+0.2%
SFO – United Airlines (UA)	14,947	13,790	+8.4%
DEN – United Airlines (UA)	11,284	11,284	+0.0%
DFW – American Airlines (AA) ★ NEW	—	—	NEW
PHX – American Airlines (AA)	7,056	7,252	-2.7%
LAX – Delta Air Lines (DL)	6,696	6,079	+10.1%

KEY INSIGHT: KOA 2026 capacity leads the state on a YoY basis in early months, driven by new DFW–AA service, SFO–UA expansion, and a stable SEA–AS baseline. Peak spring (Mar +20.6%) is the standout. Late-season softness (Oct +0.6%) warrants yield monitoring given elevated capacity vs. demand uncertainty.

Air Capacity to Hilo (ITO) — New Transpac Service| 2025 vs. 2026

CONTEXT: ITO (Hilo) had no scheduled mainland nonstop service in 2025. Southwest Airlines (WN) launched inaugural LAS–ITO service in 2026 — beginning with a small April trial during Merrie Monarch before resuming at higher scale from August onward. First mainland nonstop capacity to appear in this dataset for ITO; treat as an emerging market.

0
2025 Mainland Nonstop Seats (Full Year)

New
Inaugural Mainland Service — LAS–ITO (WN)

2,450
Oct 2026 Scheduled Seats (LAS–ITO WN)

LAS–ITO (WN SOUTHWEST) SERVICE SCHEDULE — 2026 vs. 2025

Month	Origin – Carrier	2026 Seats	2025 Seats	Status
Jan–Mar 2026	No service	0	0	No mainland nonstop
Apr 2026	**LAS – Southwest (WN)**	**175**	0	***★Inaugural / Trial***
May–Jul 2026	No service	0	0	Gap in schedule
Aug 2026	**LAS – Southwest (WN)**	**2,100**	0	***Service resumed***
Sep 2026	**LAS – Southwest (WN)**	**2,100**	0	***Continuing***
Oct 2026	**LAS – Southwest (WN)**	**2,450**	0	***Ramping up***

KEY INSIGHT: ITO represents a nascent opportunity — the first scheduled mainland nonstop in this dataset. Southwest's LAS–ITO schedule is gap-filled and small-scale, suggesting route testing. The Aug–Oct ramp-up warrants load factor tracking; strong performance could attract additional frequencies or new carrier entrants to this historically underserved market.

Nonstop Air Seats to Hawaiʻi by Origin Country — 2025 vs. 2026

Scheduled nonstop passenger seats by origin country/subregion | Jan–Oct 2025 vs. Jan–Oct 2026

SCHEDULED NONSTOP SEATS TO HAWAIʻI — BY ORIGIN COUNTRY

Origin Country / Subregion	2025 Seats	2026 Seats	YoY Chg
United States	8,786,407	9,413,381	+7.1%
Japan	1,078,984	1,029,129	-4.6%
South Korea	254,874	260,578	+2.2%
Canada	296,297	276,716	-6.6%
Australia	187,420	138,836	-25.9%
Philippines	67,053	68,289	+1.8%
New Zealand	49,185	47,459	-3.5%
Marshall Islands	28,884	28,718	-0.6%
French Polynesia	11,954	21,128	+76.7%
Cook Islands	8,127	8,316	+2.3%
Western Samoa	7,354	7,348	-0.1%
Kiribati	7,348	7,181	-2.3%
Fiji	7,310	7,310	+0.0%
TOTAL — ALL ORIGINS	**10,791,197**	**11,314,389**	**+4.8%**

+4.8%

Total YoY Seat Growth
(All Origins Combined)

+7.1%

United States YoY
(8.8M → 9.4M seats)

-25.9%

Australia YoY — Largest
Intl Decline (187K → 139K)

KEY INSIGHT: Total scheduled nonstop seats grow +4.8% YoY, driven by strong U.S. domestic expansion (+7.1%). International capacity is broadly contracting — Japan (-4.6%), Canada (-6.6%), Australia (-25.9%), and New Zealand (-3.5%) all decline. Australia's -25.9% YoY represents ~48K fewer seats and is the most acute international loss. South Korea (+2.2%) is one of the only positive international markets. International softness is the primary demand risk for inbound leisure and VFR segments.

MAHALO!

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HAWAIʻI TOURISM AUTHORITY