

2025 Spring Tourism Update

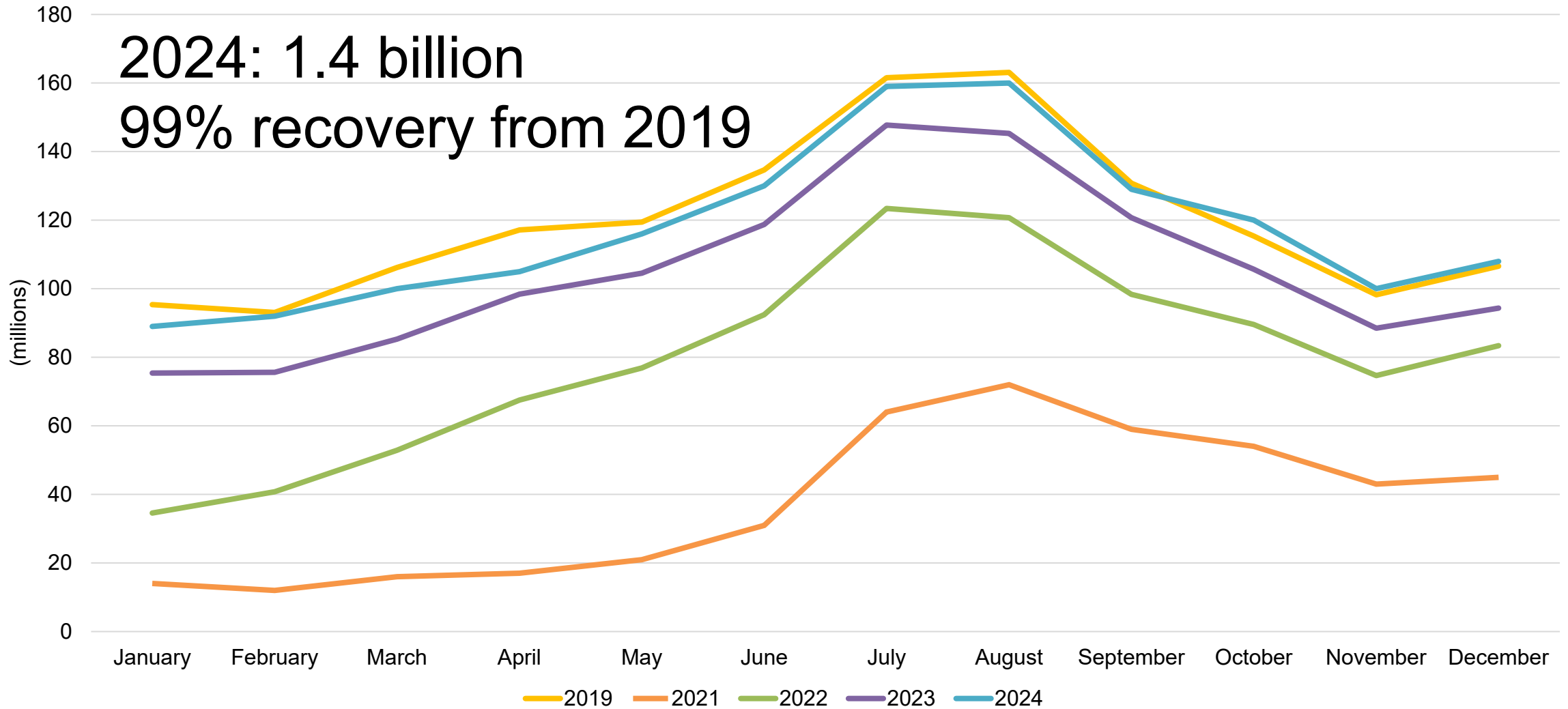
Trends & Insights

March 5, 2025

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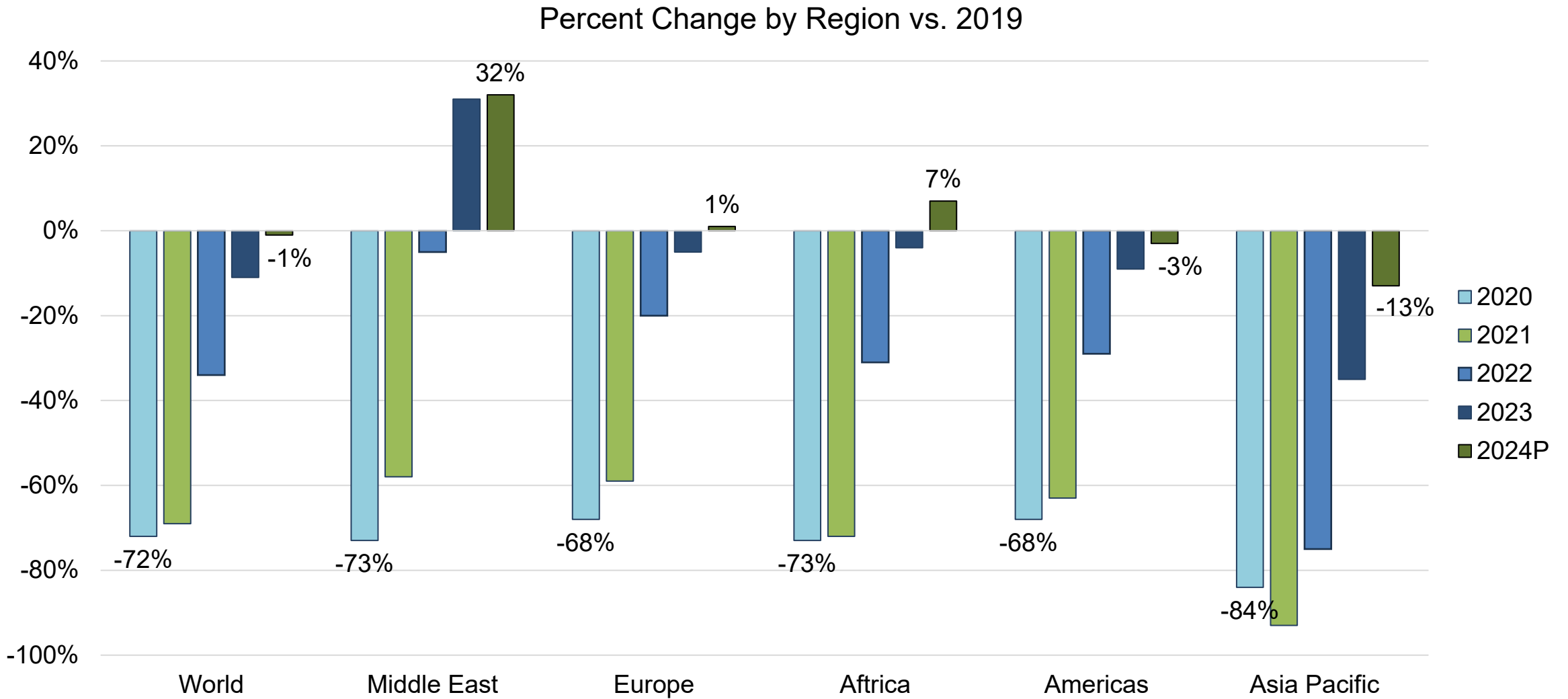


UN Tourism International Tourism Arrivals



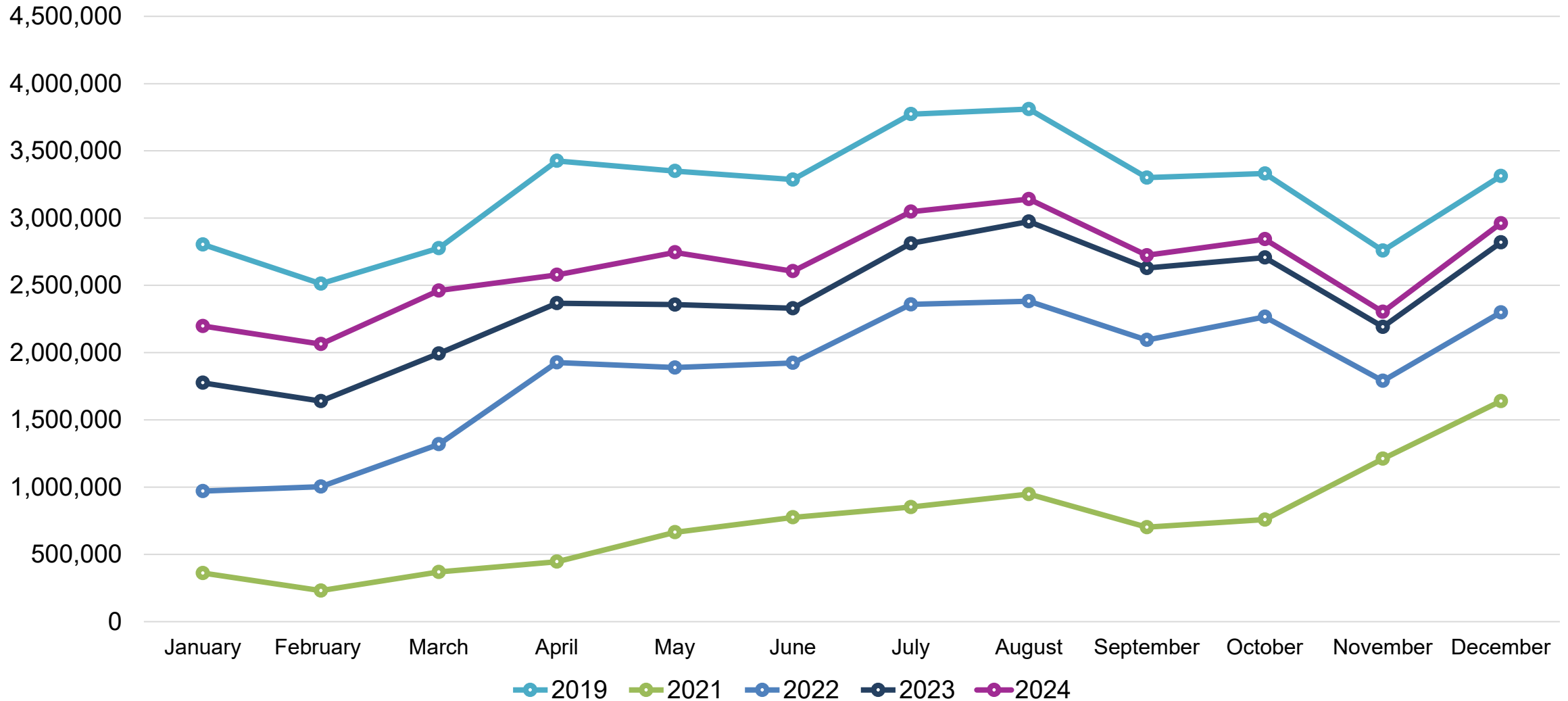
Source: United Nations World Tourism Organization, as of 2025

UN Tourism International Tourism Arrivals



Source: UN Tourism | World Tourism Organization

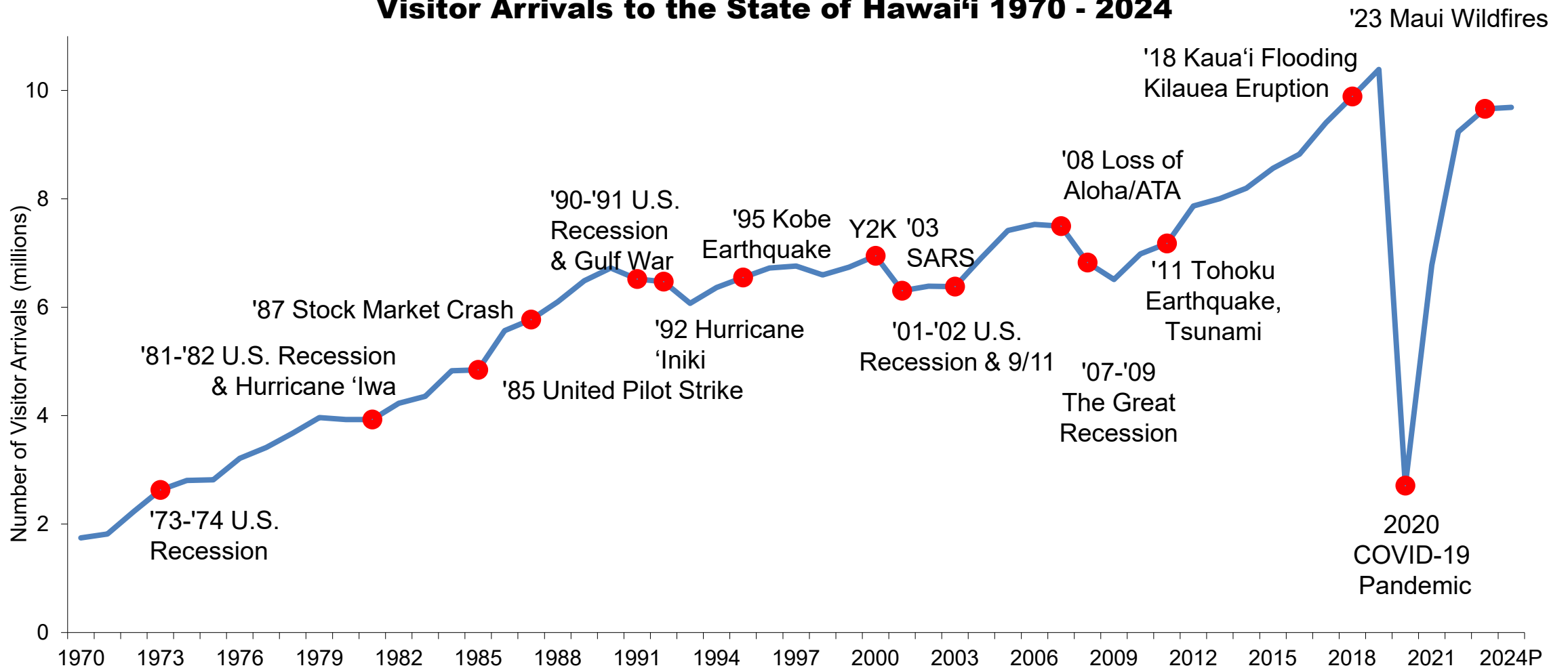
International Arrivals by Air to the U.S.



Source: National Travel and Tourism Office I-94 COR

Historical Visitor Arrivals

Visitor Arrivals to the State of Hawai'i 1970 - 2024



2024 data are preliminary.

Hawai'i Tourism at a Glance

	2013	2014	2015	2016	2017R	2018	2019	2020	2021	2022	2023	2024P ¹
Spending (including Supplemental Business)	\$14.52B	\$14.97B (3.1%)	\$15.11B (0.9%)	\$15.91B (5.3%)	\$16.79B (5.6%)	\$17.64B (5.1%)	\$17.84B (1.1%)	\$5.16B (-71.1%)	\$13.15B (154.8%)	\$19.8B (50.5%)	\$20.87B (5.4%)	\$20.68B (-0.9%)
Tax Revenue	\$1.55B	\$1.59B (3.2%)	\$1.71B (7.1%)	\$1.86B (8.8%)	\$1.96B (5.6%)	\$2.06B (5.1%)	\$2.08B (1.0%)	\$0.6B (-71.0%)	\$1.54B (155%)	\$2.3B (49.4%)	\$2.42B (5.2%)	\$2.4B (-0.9%)
Jobs Supported	163,000	168,000 (3.1%)	177,000 (5.5%)	194,000 (9.6%)	205,000 (5.7%)	215,000 (4.9%)	217,000 (0.9%)	63,000 (-71.0%)	160,000 (154.1%)	202,000 (26.3%)	213,000 (5.4%)	211,000 (-0.9%)
Arrivals	8.17M	8.32M (1.8%)	8.68M (4.3%)	8.93M (2.9%)	9.4M (5.3%)	9.89M (5.2%)	10.39M (5.0%)	2.71M (-73.9%)	6.78M (150.3%)	9.23M (36.2%)	9.66M (4.6%)	9.69M (0.3%)
Air Seats	10.9M	11.3M (3.7%)	11.94M (5.7%)	12.02M (0.7%)	12.24M (1.8%)	13.24M (8.2%)	13.62M (2.9%)	5.32M (-60.9%)	10.74M (101.8%)	12.75M (18.7%)	13.12M (3.0%)	13.27M (1.2%)

¹ 2024 data are preliminary. 2024 spending does not include supplemental business

² 2020 expenditures were estimated by DBEDT. 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia, Oceania, Europe and Latin America, visitor spending data were only available from January-March 2020; data for November and December were not available due to limited samples. Tax revenue generated and jobs supported were calculated using this estimate.

DBEDT Tourism Forecast



Source: DBEDT, Q4 2024 Forecast, Q1 2025 Forecast to be released March 5, 2025, 9am

Hawai'i Remains Top State U.S. Travelers Want to Visit

Rank	Destination	% Interested
1	Hawaii	68%
2	Florida	64%
3	California	59% ▲
4	Colorado	57%
5	New York	55% ▲
6	Alaska	54%
7	Texas	47%
8	Nevada	46%
9	Arizona	45%
10	North Carolina	43%
11	Tennessee	42%
12	Maine	40%
12	Georgia	40%
14	South Carolina	39%
14	Washington	39%
16	Montana	37%
17	Massachusetts	36%
17	Louisiana	36%
19	Oregon	34%
20	Utah	31%

Rank	Destination	% Interested
20	Pennsylvania	31%
20	New Mexico	31%
23	Vermont	30%
23	Virginia	30%
25	Wyoming	29%
26	Michigan	28%
27	Maryland	27%
27	New Hampshire	27%
27	New Jersey	27%
30	Connecticut	26%
31	Rhode Island	25%
32	Illinois	24%
33	Wisconsin	23%
34	West Virginia	22%
34	Kentucky	22%
34	Alabama	22%
34	South Dakota	22%
38	Minnesota	21%
38	Idaho	21%
40	North Dakota	20%

Rank	Destination	% Interested
40	Missouri	20%
42	Mississippi	19%
42	Ohio	19%
42	Delaware	19%
45	Oklahoma	17% ▼
45	Arkansas	17%
47	Nebraska	16% ▼
47	Indiana	16%
47	Kansas	16%
50	Iowa	14%

▲ Displayed a statistically significant increase compared to Q4 2023

▼ Displayed a statistically significant decrease compared to Q4 2023

Source: MMGY's 2024 Portrait of American Travelers® "Winter Edition", States interested in visiting during the next 2 years

U.S. Trans-pacific Air Seats 2023, 2024 and 2025P Projection as of March 2025

	# of SEATS 2023	# of SEATS 2024	# of SEATS 2025P	% Change 25/23	% Change 25/24
O'ahu	5,843,716	6,027,994	5,940,685	1.7%	-1.4%
Maui	2,723,716	2,343,773	2,258,289	-17.1%	-3.6%
Kona	1,324,361	1,268,184	1,240,405	-6.3%	-2.2%
Kaua'i	997,164	976,623	1,000,575	0.3%	2.5%
TOTAL	10,888,957	10,616,574	10,439,954	-4.1%	-1.7%

Trans-pacific Air Seat by Country 2019, 2024 and 2025P

Projection as of March 2025

	# of SEATS 2019	# of SEATS 2024	# of SEATS 2025P	% Change 25/19	% Change25/24
Australia	369,282	236,187	226,952	-38.5%	-3.9%
Canada	484,613	424,143	394,145	-18.7%	-7.1%
Japan	1,999,204	1,414,502	1,311,440	-34.4%	-7.3%
New Zealand	125,300	61,454	63,067	-49.7%	2.6%
Philippines	73,248	79,717	80,649	10.1%	1.2%
South Korea	326,398	277,117	269,039	-17.6%	-2.9%
United States	9,913,374	10,769,564	10,609,404	7.0%	-1.5%

Summer: As Southwest and AS/HA adjust Hawai'i operations, expect continued capacity reductions and realignment into 2025

June 2025 vs June 2024

LIH	Seat Change
West Coast	-0.8%
Other Domestic	-4.8%
Total Domestic	-3.1%



ALL CARRIERS

OGG	Seat Change
West Coast	-9.9%
Other Domestic	-10.8%
Total Domestic	-10.4%

HNL	Seat Change
West Coast	-2.1%
Other Domestic	-6.7%
Total Domestic	-4.8%



All HAWAI'I	Seat Change
West Coast	-3.8%
Other Domestic	-7.1%
Total Domestic	-5.8%

KOA	Seat Change
West Coast	-2.2%
Other Domestic	-8.7%
Total Domestic	-5.9%



Note: West Coast includes airports in California, Oregon and Washington as well as LAS and PHX
 Source: Cirium schedule data via Diio Mi, June 2025 vs June 2024 as of December 16, 2024; Ailevon Pacific Aviation Consulting analysis



Holding Steady...

- Resident Sentiment
- Visitor Satisfaction
- Brand Health
 - Destination Awareness
 - Chatter
 - Consideration
 - Favorability
 - Intent to Travel

Our Plans



MAHALO!



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

