

HTA REGULAR BOARD MEETING

Thursday, January 26, 2023

Hō‘ike ‘Ikepili Noi‘i ‘Oihana Ho‘omāka‘ika‘i

Presentation and Discussion of Current Market Insights and Conditions in Hawai‘i and Key Major Hawai‘i Tourism Markets, including the United States, Japan, Canada, Oceania, and Cruise

Jennifer Chun

Director of Tourism Research

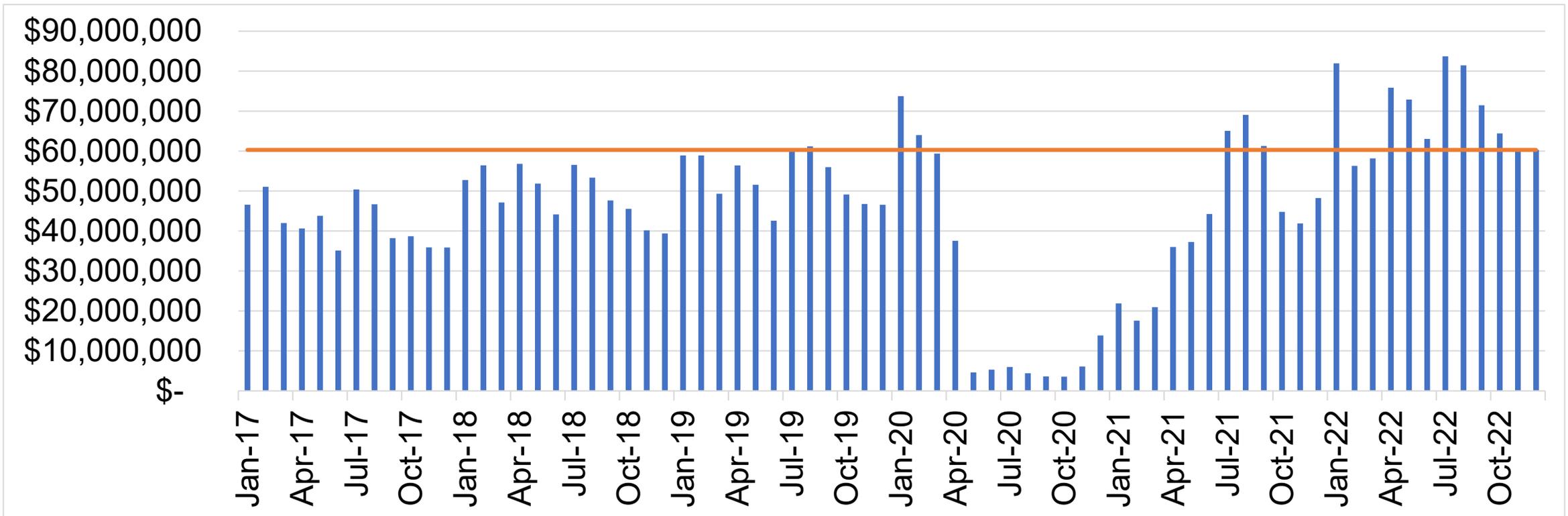
HAWAII TOURISM
AUTHORITY

The logo for the Department of Business, Economic Development & Tourism (DBEDT) features a stylized blue wave icon to the left of the acronym 'DBEDT' in large, bold, white letters. Below the acronym, the text 'STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM' is written in a smaller, white, sans-serif font.

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

December 2022 Highlights – TAT Collections

- Preliminary December TAT Collections: \$60.3 million
- Preliminary YTD Fiscal 23 TAT Collections: \$421.8 million (+27.7%)
- YTD Fiscal 22 TAT Collections: \$330.4 million (+\$91.4 million)

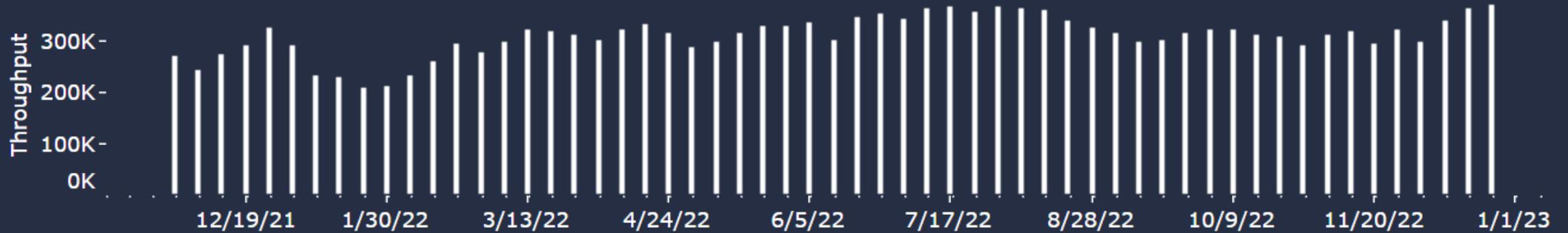


Source: Department of Taxation

December 2022 Highlights - Hawai'i Airport Throughput

Throughput by Week

State: Hawaii; Airport: All



Hawaii Airports

Throughput for the last 6 months, % change compared to 2019

	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Daniel K. Inouye International Airport	-16%	-16%	-13%	-12%	-13%	-9%
Kahului	-5%	0%	6%	4%	2%	0%
Ellison Onizuka Kona International Airport	-2%	-4%	6%	4%	-2%	-1%
Lihue	7%	6%	16%	16%	9%	4%
Hilo International	11%	11%	18%	18%	16%	16%

Source: TSA by Tourism Economics

December 2022 Highlights - Lodging

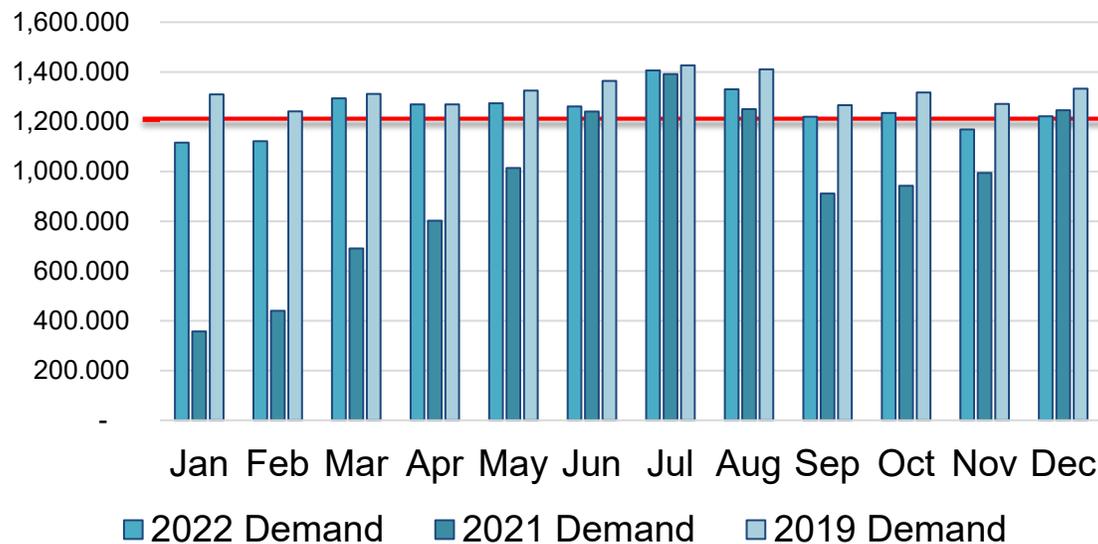
State of Hawai'i Hotel Performance

	2022	2021	2019
Occupancy	71.3%	72.3%	80.2%
ADR	\$440	\$422	\$353
RevPAR	\$314	\$305	\$283

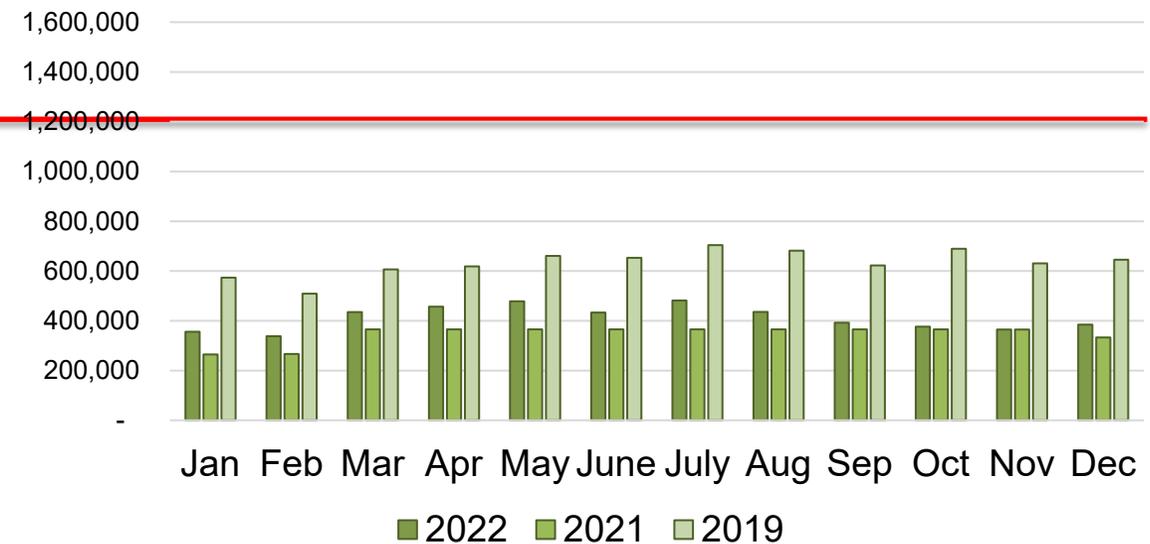
State of Hawai'i Vacation Rental Performance

	2022	2021	2019
Occupancy	57.9%	66.9%	75.3%
ADR	\$323	\$280	\$234

State of Hawai'i Hotel Demand



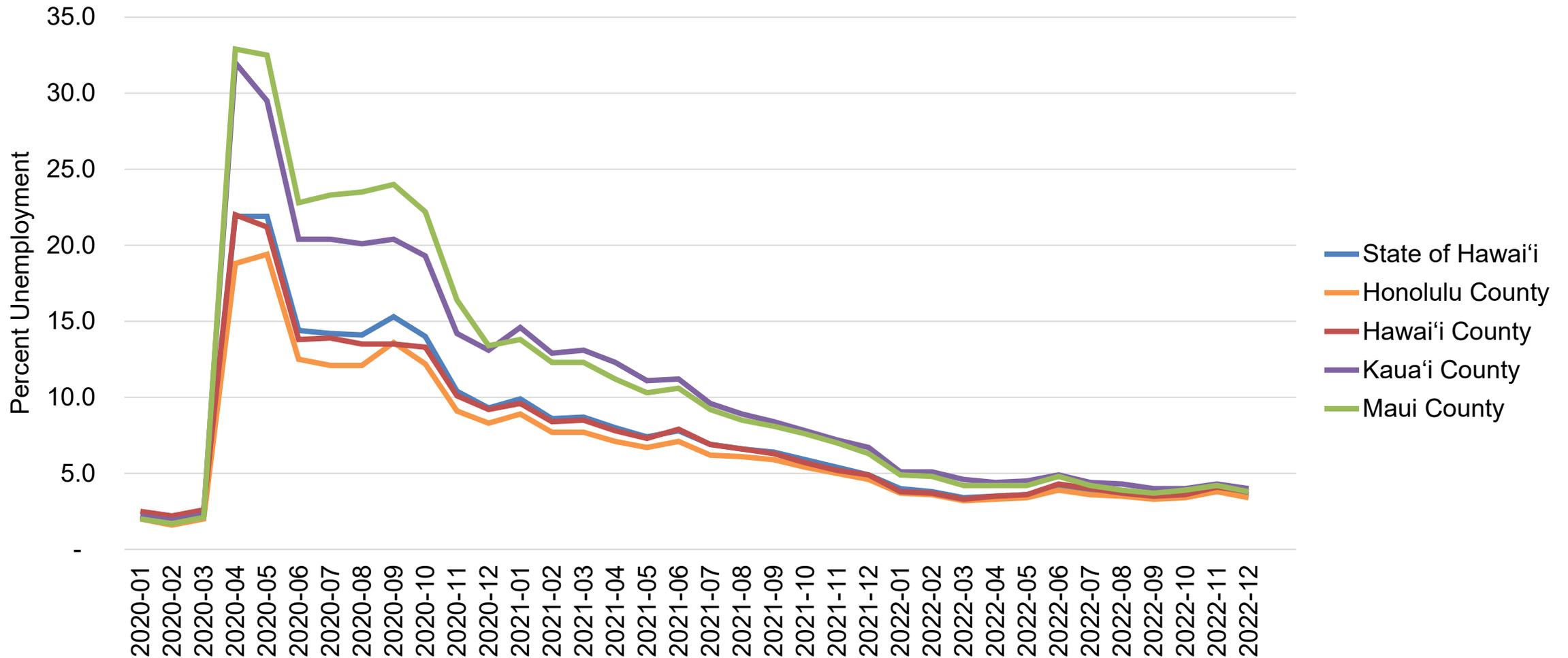
State of Hawai'i Vacation Rental Demand



Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority, Transparent Intelligence, Inc. © Copyright 2023 State of Hawai'i Department of Business, Economic Development & Tourism

December 2022 Highlights – Unemployment Rates

Unemployment Rate, Civilian

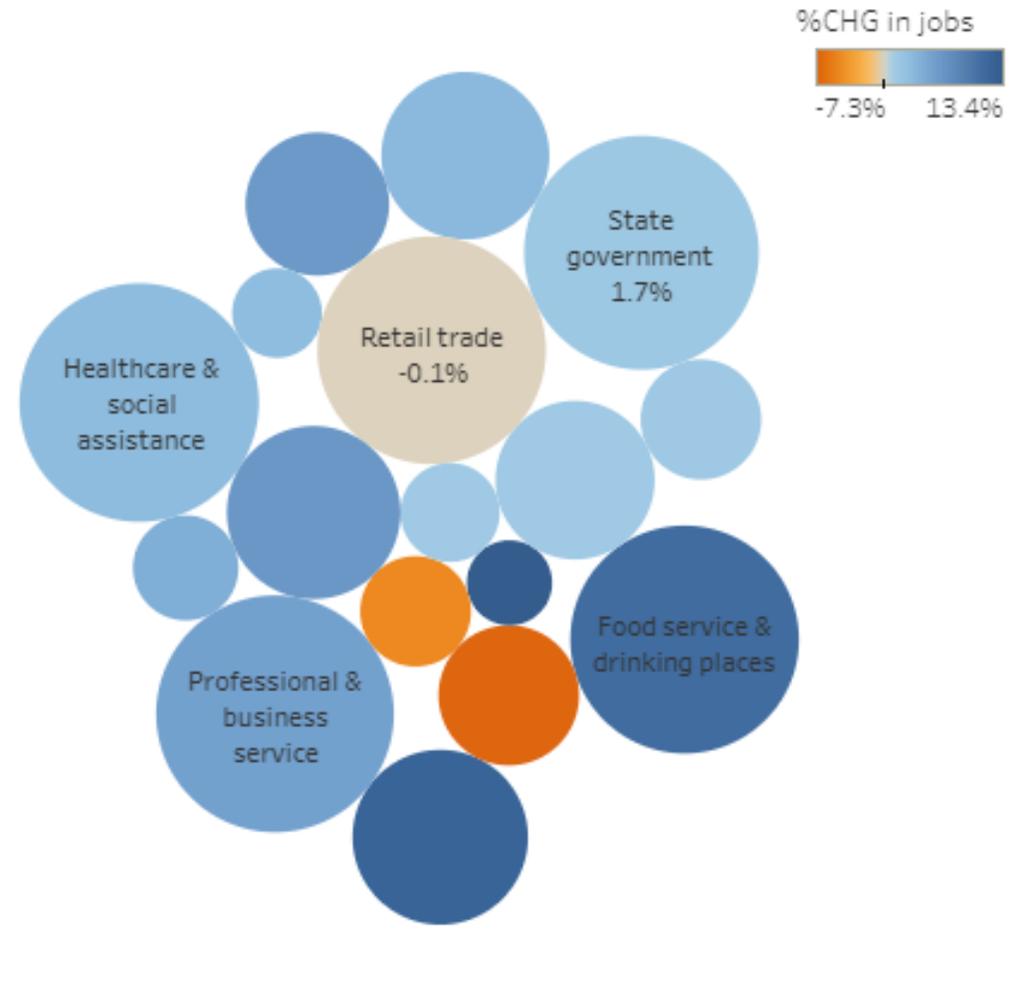


Compiled by Research & Economic Analysis Division, State of Hawai'i Department of Business, Economic Development and Tourism. Source: State of Hawai'i Dep. of Labor & Industrial Relations

December 2022 Highlights – Jobs by Industry

	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	628,700	23,600	3.9%
Nat'l resources, mining & construction	38,600	2,400	6.6%
Manufacturing	12,600	200	1.6%
Wholesale trade	15,700	-800	-4.8%
Retail trade	66,800	-100	-0.1%
Transportation, warehousing & utilities	32,400	500	1.6%
Information	9,300	1,100	13.4%
Financial activities	25,300	-2,000	-7.3%
Professional & business service	72,300	3,800	5.5%
Educational service	14,200	600	4.4%
Healthcare & social assistance	73,300	2,200	3.1%
Arts, entertainment & recreation	10,300	300	3.0%
Accommodation	39,400	4,300	12.3%
Food service & drinking places	66,900	6,800	11.3%
Other service	26,400	1,600	6.5%
Federal government	36,100	1,200	3.4%
State government	70,500	1,200	1.7%
Local government	18,600	300	1.6%

*Change from the same period of previous year



Compiled by Research & Economic Analysis Division, State of Hawai'i Department of Business, Economic Development and Tourism. Source: State of Hawai'i Dep. of Labor & Industrial Relations

Scheduled Nonstop Seats to Hawai'i by Port Entry

January	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,179,952	1,034,876	1,124,985	952,082	922,585	760,230	227,870	112,291	364,755
HONOLULU	682,596	541,903	692,230	496,368	466,537	385,566	186,228	75,366	306,664
KAHULUI	289,545	282,137	227,818	261,311	255,776	195,030	28,234	26,361	32,788
KONA	117,394	111,945	114,953	107,988	105,557	97,410	9,406	6,388	17,543
HILO	1,162	2,685	2,822	1,162	2,685	2,822	0	0	0
LIHU'E	89,255	96,206	87,162	85,253	92,030	79,402	4,002	4,176	7,760

February	Total			Domestic			International		
	2023	2022	2019	2023	2022	2019	2023	2022	2019
STATE	1,046,529	937,640	1,001,992	849,351	840,581	676,436	197,178	97,059	325,556
HONOLULU	605,360	489,503	615,316	444,920	426,886	342,742	160,440	62,617	272,574
KAHULUI	258,573	262,896	203,181	232,891	237,636	173,414	25,682	25,260	29,767
KONA	105,636	100,792	104,142	98,060	95,264	87,827	7,576	5,528	16,315
HILO	0	2,148	2,656	0	2,148	2,656	0	0	0
LIHU'E	76,960	82,301	76,697	73,480	78,647	69,797	3,480	3,654	6,900

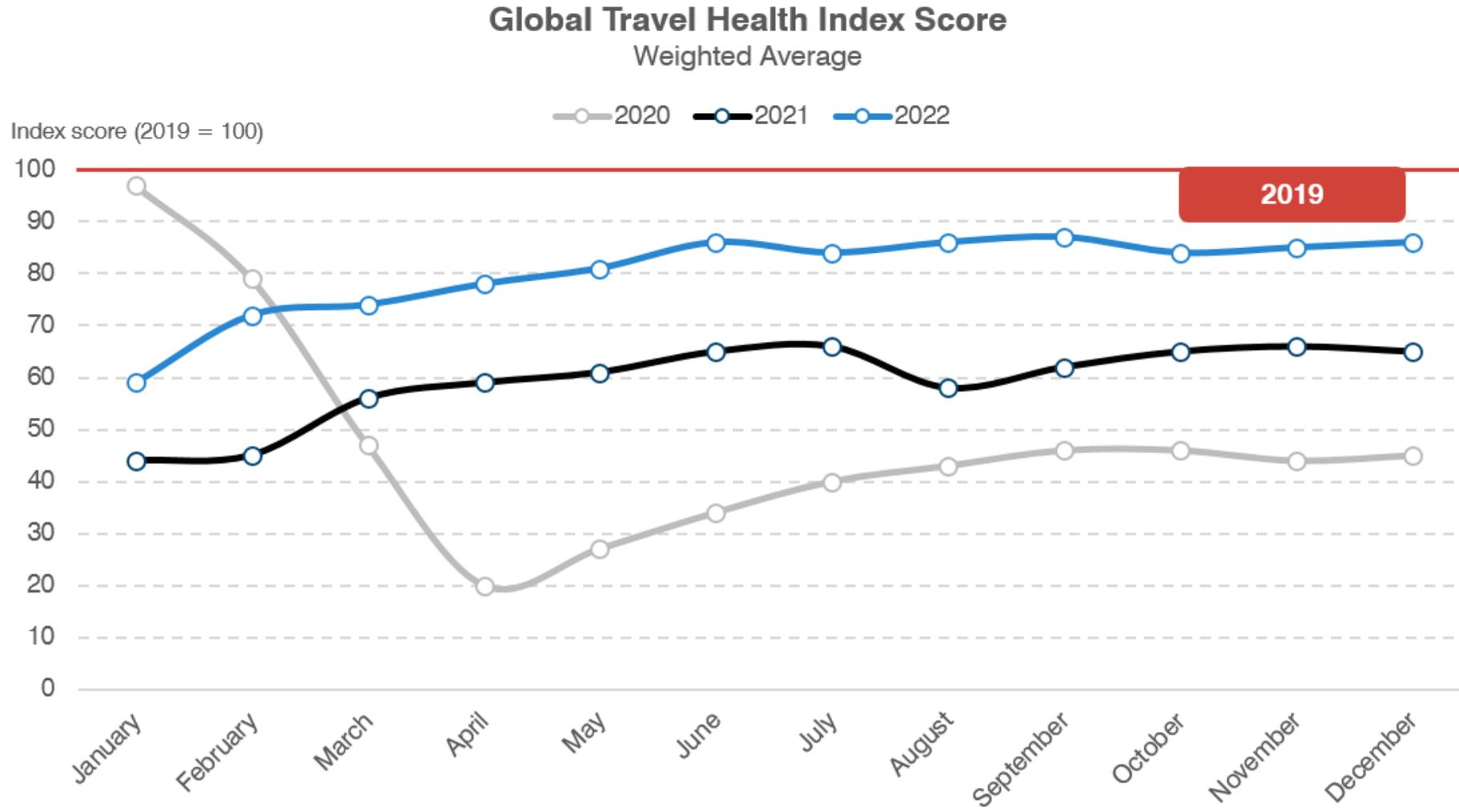
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of January 23, 2022, subject to change

Scheduled Nonstop Seats to Hawai'i by Port Entry

March	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,230,961	1,159,954	1,183,596	998,356	1,029,748	834,753	232,605	130,206	348,843
HONOLULU	695,123	590,706	711,281	506,326	509,436	420,930	188,797	81,270	290,351
KAHULUI	310,844	329,044	250,043	281,279	293,411	216,456	29,565	35,633	33,587
KONA	129,873	130,795	124,674	118,936	122,712	106,853	10,937	8,083	17,821
HILO	0	3,899	3,665	0	3,899	3,665	0	0	0
LIHU'E	95,121	105,510	93,933	91,815	100,290	86,849	3,306	5,220	7,084

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of January 23, 2022, subject to change

Skift Travel Health Index December 2022 = 86



Source: Skift Research from partner data. All data vs same month in 2019.

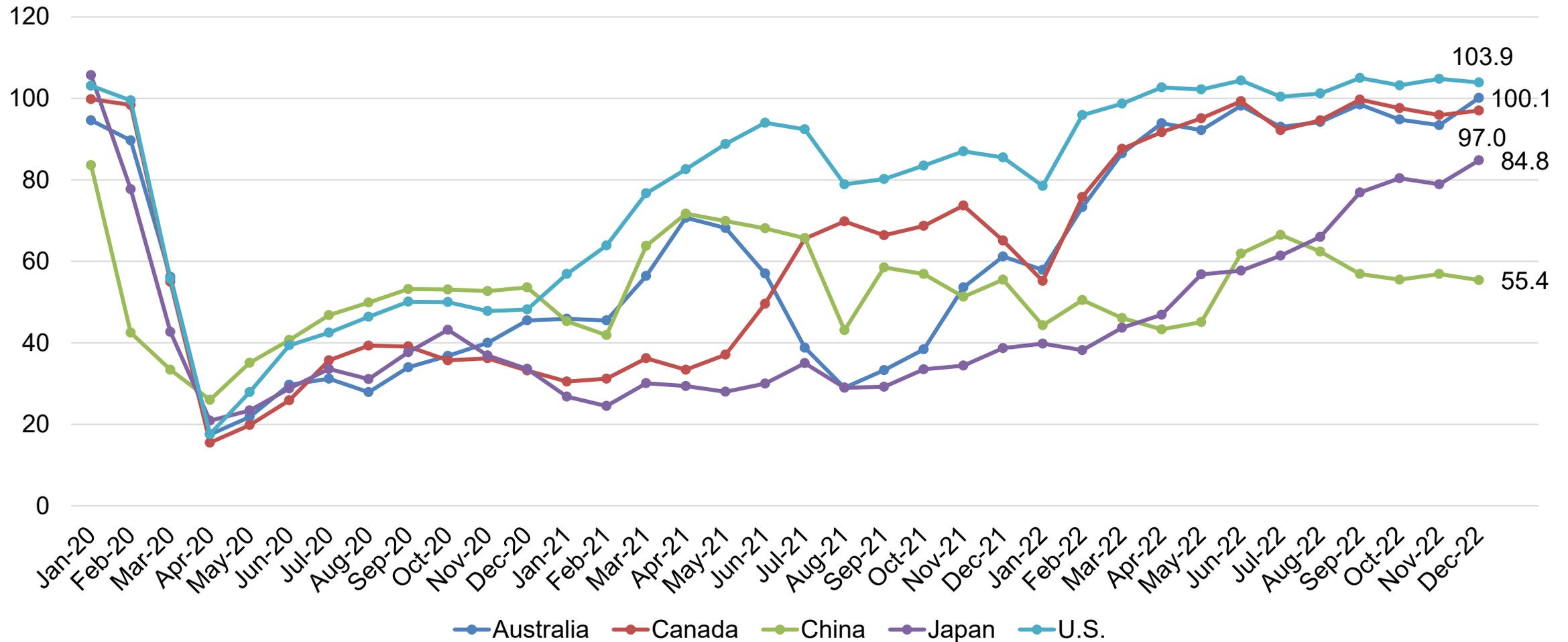


Source: Skift Research



Skift Travel Health Index by Country

Skift Travel Health Index for Selected Countries



Source: Skift Research



Travel Spending (Tourism Economics)

↗ **+0.6%**

November vs. 2019

↘ **-1.0%**

YTD vs. 2019



Auto Trips (Arrivalist)

↘ **-5.8%**

November vs. 2019

YTD N/A



Air Passengers (TSA)

↘ **-5.7%**

November vs. 2019

↘ **-10.6%**

YTD vs. 2019



Overseas Arrivals (NTTO)

↘ **-33.1%**

November vs. 2019

↘ **-41.8%**

YTD vs. 2019



Hotel Demand (STR)

↘ **-1.2%**

November vs. 2019

↘ **-2.6%**

YTD vs. 2019



Short-term Rental Demand (AIRDNA)

↗ **+30.5%**

November vs. 2019

↗ **+22.1%**

YTD vs. 2019

Insights

Auto trips slid to 6% below its 2019 level in November from 3% above in October.

Air passenger volume registered 6% below 2019 in November, a slight decrease from the prior month.

Overseas arrivals retreated to 33% below its 2019 level in November, remaining a weak point for the broader travel recovery.

Hotel room demand dipped slightly below its 2019 level in November and group demand within the top 25 markets slid one percentage point to 7% below its 2019 level – both minor downgrades from October.

Short-term rental demand moderated slightly in November, recording 30% growth beyond its 2019 level.

Travel Indicators

% change relative to same month in 2019

	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22
Travel Spending (Tourism Economics)	-4%	-12%	-6%	-5%	3%	0%	1%	0%	-3%	6%	3%	1%
Auto Trips (Arrivalist)	-2%	-12%	-2%	-13%	6%	-2%	2%	-1%	-15%	6%	3%	-6%
Air Passengers (TSA)	-16%	-23%	-16%	-12%	-9%	-10%	-11%	-12%	-9%	-6%	-5%	-6%
Overseas Arrivals (NTTO)	-51%	-65%	-60%	-52%	-43%	-43%	-41%	-35%	-35%	-34%	-30%	-33%
Hotel Demand (STR)	12%	-10%	-5%	-3%	0%	-2%	-2%	-3%	-4%	2%	0%	-1%
Top 25 Group Hotel Demand* (STR)	-27%	-58%	-42%	-23%	-16%	-14%	-5%	-11%	-10%	-5%	-6%	-7%
Short-term Rental Demand (AIRDNA)	12%	20%	21%	14%	23%	24%	22%	19%	14%	25%	33%	30%
National Park Visits (National Park Service)	2%	16%	4%	3%	-9%	-9%	-11%	-9%	-13%	-4%	-7%	-14%
Organic Web Sessions (Simpleview & Tempest)*	31%	35%	42%	34%	32%	29%	25%	15%	14%	16%	24%	24%

*data from 300+ U.S. DMO/CVB destination websites

-65% 42%

Hawaii Travel Indicators

November, 2022

Select a State

Hawaii

Hawaii Travel Impact

November, 2022

Travel Spending **\$2.25B**
 ↘ **-2.4%** vs. 2019

Tax Revenue (local & state) **\$137.7M**
 ↘ **-1.8%** vs. 2019

U. S. Total Travel Impact

November, 2022

Travel Spending **\$93.81B**
 ↗ **+0.6%** vs. 2019

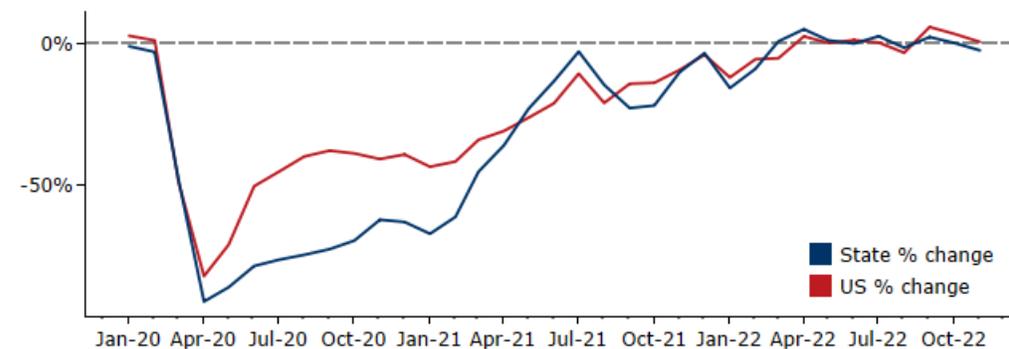
Tax Revenue (local & state) **\$6.4B**
 ↗ **+0.3%** vs. 2019

Hawaii Travel Spending

	Travel Spending	vs. Last Year	vs. 2019	Market Growth Index (US = 100)*
Dec-21	\$2.24B	↗ +163.9%	↘ -3.4%	101
Jan-22	\$1.86B	↗ +159.9%	↘ -15.8%	96
Feb-22	\$1.99B	↗ +136.9%	↘ -9.0%	96
Mar-22	\$2.49B	↗ +85.1%	↗ +0.8%	106
Apr-22	\$2.54B	↗ +64.6%	↗ +5.1%	102
May-22	\$2.53B	↗ +31.6%	↗ +1.1%	101
Jun-22	\$2.56B	↗ +15.4%	--	99
Jul-22	\$2.67B	↗ +5.6%	↗ +2.6%	102
Aug-22	\$2.51B	↗ +15.5%	↘ -1.5%	102
Sep-22	\$2.44B	↗ +32.7%	↗ +2.3%	97
Oct-22	\$2.48B	↗ +28.5%	↗ +0.2%	97
Nov-22	\$2.25B	↗ +8.6%	↘ -2.4%	97

Travel Spending (% change vs 2019)

Hawaii vs U.S. total



↘ **-2.4%**

November vs. 2019
Travel Spending
 (Tourism Economics)



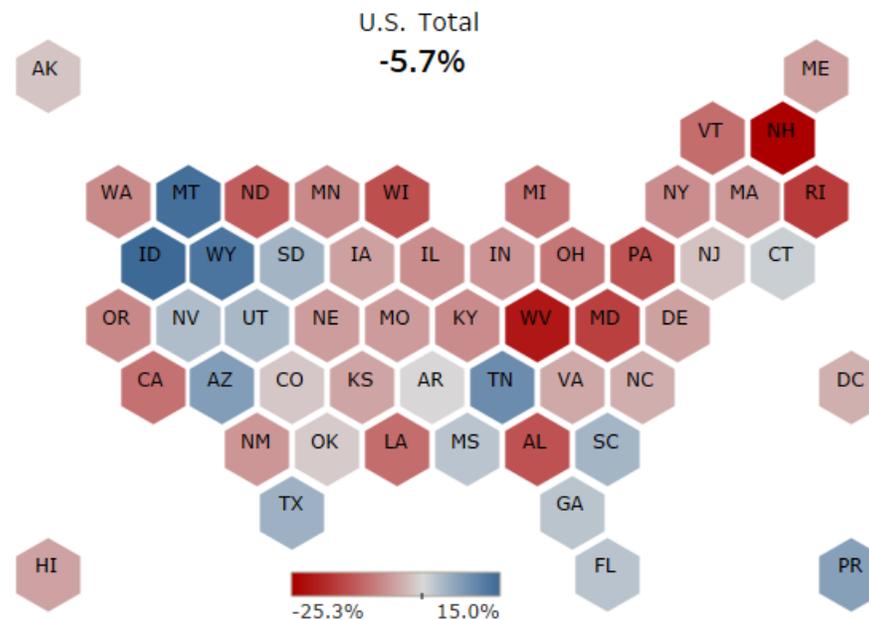
↘ **-5.4%**

November vs. 2019
Air Passengers
 (Airline Data Inc; TSA)

Air Passengers by State

November, 2022, % change vs. 2019

Air Passengers



↗ **+8.6%**

November vs. 2019
Auto Trips
 (Arrivalist)



↘ **-11.5%**

November vs. 2019
Hotel Demand
 (STR)



↘ **-6.1%**

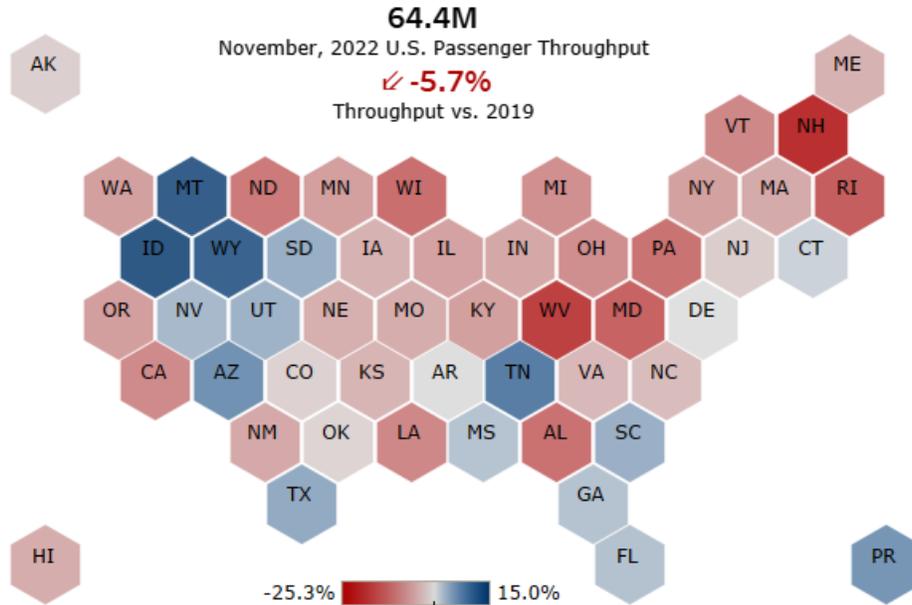
November vs. 2019
L & H Jobs
 (BLS)

Economics (Travel Spending)

Index indicates whether a state is performing better or worse than the national average relative to its pre-pandemic benchmark.

November, 2022 Passenger Throughput by State

All passengers (domestic + international), % change vs. 2019



Passenger Throughput Trend Comparison

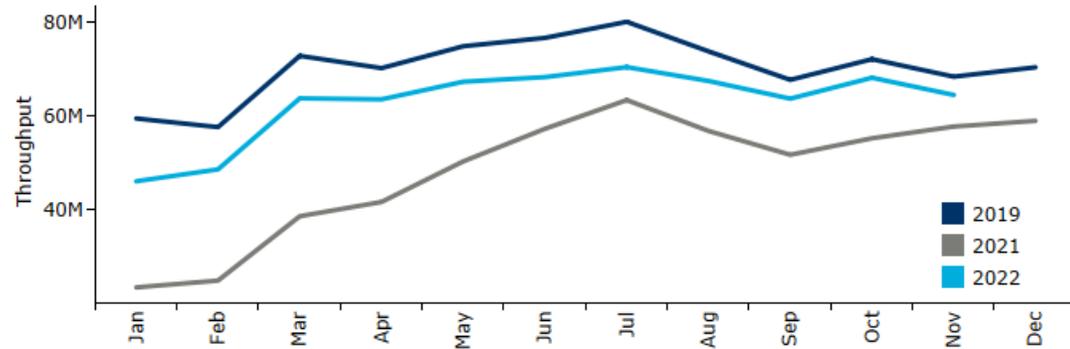
All passengers (domestic + international), Index (2019=100)

State/Territory Name
Multiple values

	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22
Arizona	96	98	100	89	85	96	96	104	103	99	99	100	108	106	107
California	66	70	75	72	61	71	76	82	83	82	83	81	89	88	89
Colorado	87	89	92	87	83	92	94	94	91	89	88	89	96	97	98
Hawaii	64	68	76	78	72	77	87	94	90	86	91	91	96	96	94
Illinois	74	75	81	78	71	76	82	84	87	87	88	87	91	90	92
Indiana	83	88	88	83	83	85	89	91	88	85	86	87	91	91	93
Kentucky	78	80	85	81	74	82	86	88	85	86	88	86	92	89	92
Massachusetts	63	70	75	71	61	71	81	86	86	86	88	87	92	94	93
Michigan	77	75	83	77	71	82	85	86	85	83	83	84	88	86	90
Minnesota	70	72	79	74	72	80	82	83	80	80	80	80	83	86	92
Missouri	78	78	85	78	72	78	85	86	87	86	87	89	94	91	94
Montana	111	109	104	94	106	113	112	109	109	104	100	105	115	115	114
Nevada	84	91	94	88	79	91	94	98	100	97	101	99	102	108	103
New York	61	64	77	75	64	75	79	86	86	84	86	86	89	88	92
North Carolina	77	81	86	80	72	84	90	91	91	91	91	89	97	93	96
Oregon	74	79	84	77	72	80	84	90	88	85	82	82	90	90	92
South Dakota	97	100	98	93	94	104	107	108	99	98	101	99	102	105	104
Texas	84	88	95	88	82	88	95	99	100	96	97	97	106	104	105
Virginia	69	71	80	78	67	75	84	90	91	90	93	89	95	93	95
Washington	72	76	81	74	70	82	82	89	87	85	85	85	92	93	92
United States	76	77	84	84	77	84	88	91	90	89	88	91	94	95	94

U.S. Monthly Passenger Throughput

All passengers (domestic + international)



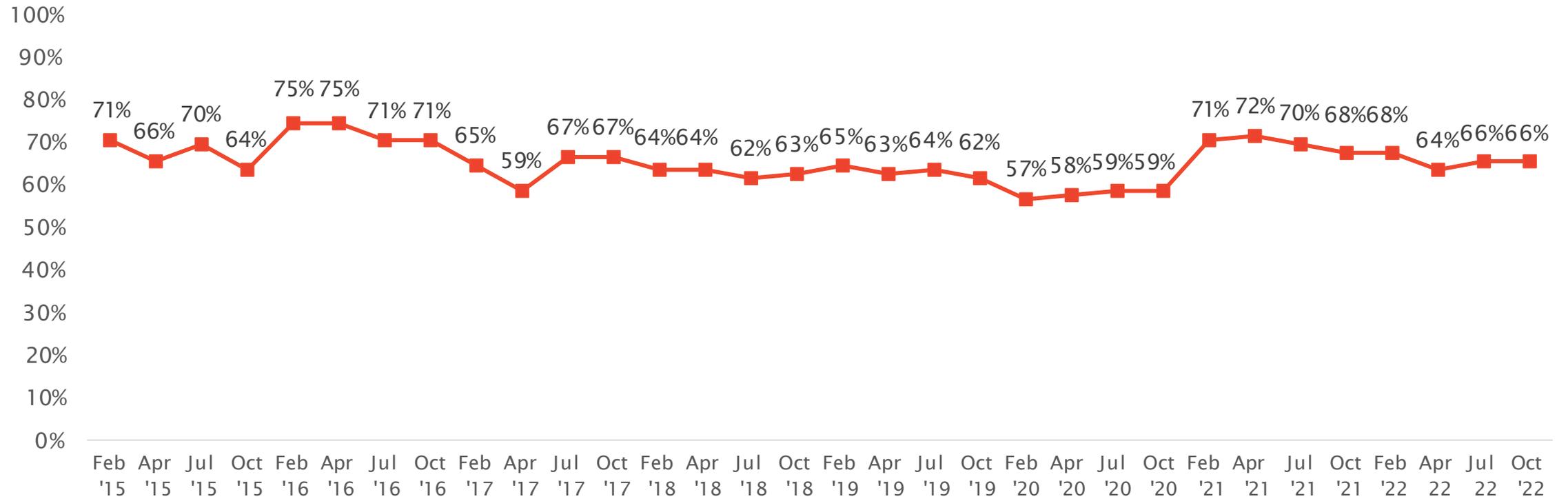
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Winter Edition 2022

PORTRAIT OF AMERICAN TRAVELERS[®]

Interest in Visiting Hawaii is Down Slightly from October '21.

Interest in Visiting Hawaii Next 2 Years
(Top 2 Box)



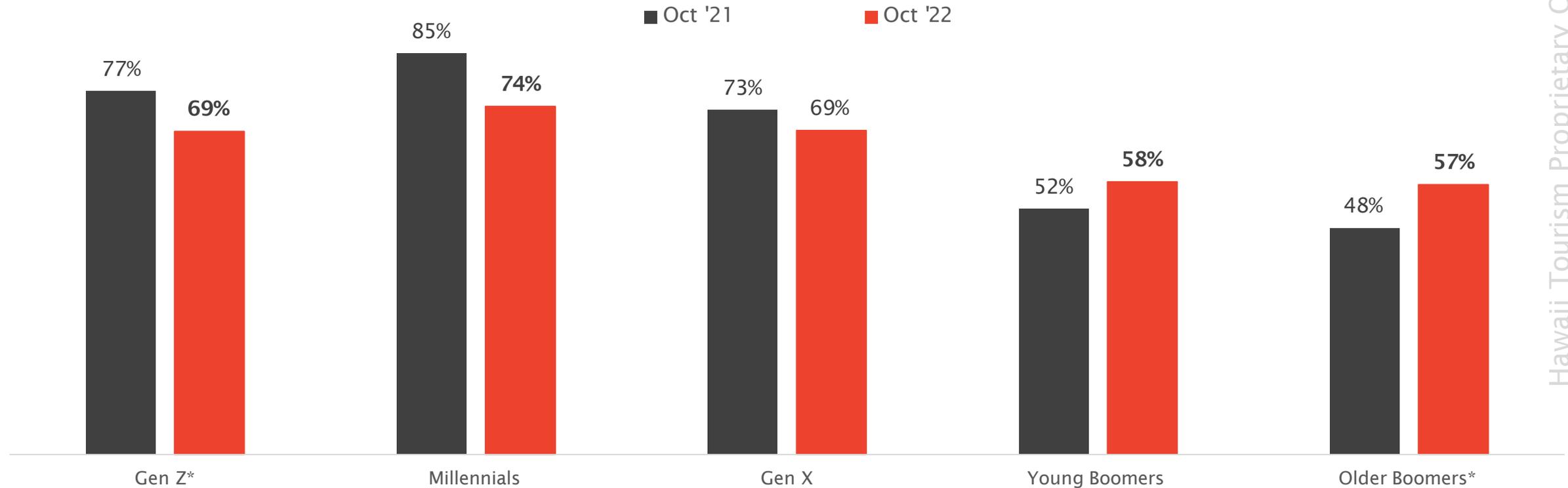
Hawaii Tourism Proprietary Questions

Base: Air Travelers (n=1,616)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Interest in Visiting Hawaii Declined in Younger Generations But Increased Significantly in Older Generations.

Interest in Visiting Hawaii
By Generation



* Small sample size - Interpret with caution.

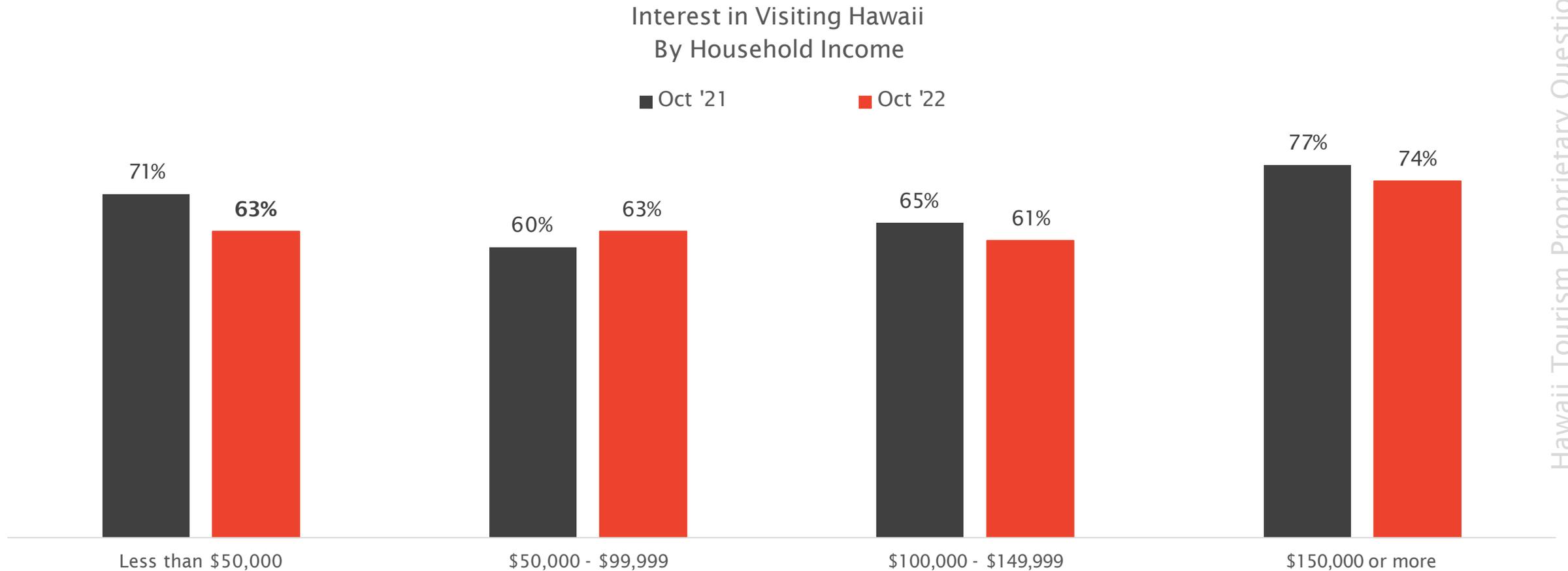
Data in bold indicates a significant difference from October 2021.

Base: Air Travelers (n=1,616)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Hawaii Tourism Proprietary Questions

Interest in Visiting Hawaii Has Decreased Among Those With Incomes of Less Than \$50,000.



Hawaii Tourism Proprietary Questions

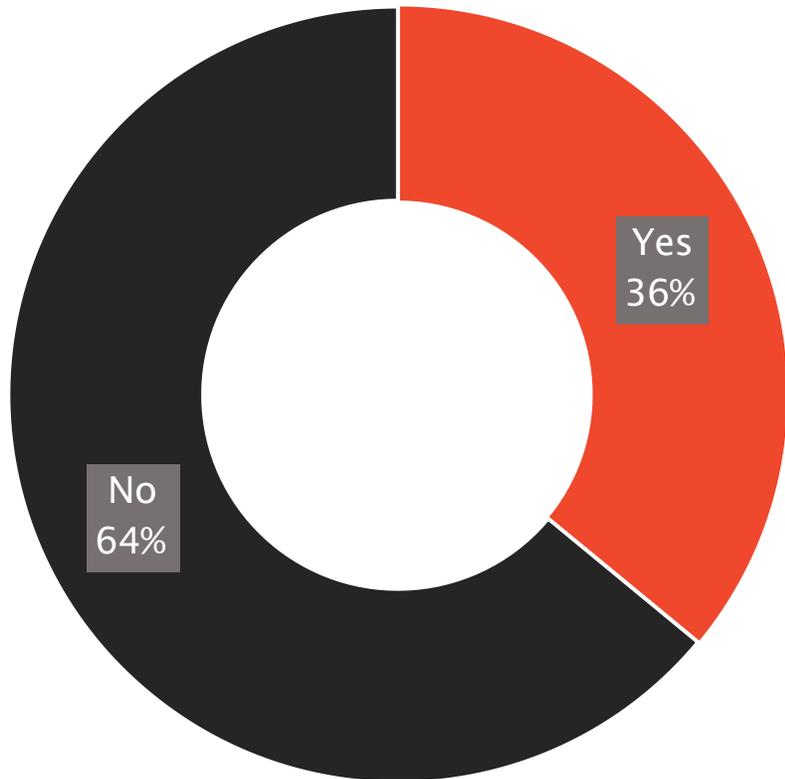
Data in bold indicates a significant difference from October 2021.

Base: Air Travelers (n=1,616)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

The Cost to Visit Hawaii is the Top Deterrent to Visit, All Increasing Significantly From Last Year.

Considered Visiting Hawaii But Changed Mind



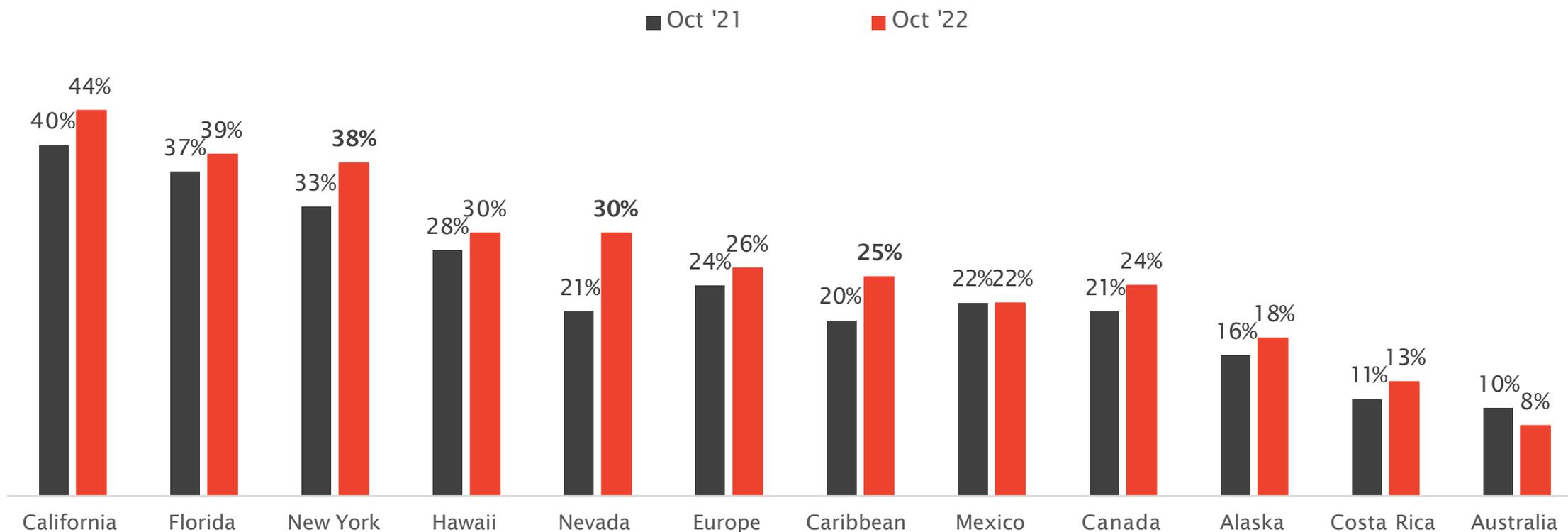
Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Oct '21	Oct '22
Price of airfare	21%	34%
Price of a vacation package	22%	33%
Price of the hotel	23%	28%
Hawaii's COVID-19 travel restrictions	27%	25%
Better value at another destination	16%	22%
The flight to Hawaii is too long	17%	20%
Concerns about COVID-19 variants	21%	19%
Not enough time to travel to Hawaii	11%	13%
Not sure which island(s) in Hawaii to visit	11%	12%
Hurricanes and tropical storms hitting Hawaii	9%	11%
Already been and want to try another destination	13%	10%
Hawaii is not unique enough	12%	10%
Accommodations were not available	10%	10%
Local people are not friendly	8%	9%
Hawaii is too crowded	13%	9%
Hawaii is not exotic enough	10%	9%
Not enough activities in Hawaii	10%	8%

Data in bold indicates a significant difference from October 2021.

Hawaii Tourism Proprietary Questions

Past Visitation To Hawaii Rose Slightly From Oct '21.

Destinations Visited in Past 3 Years
Among Those Likely to Visit Hawaii



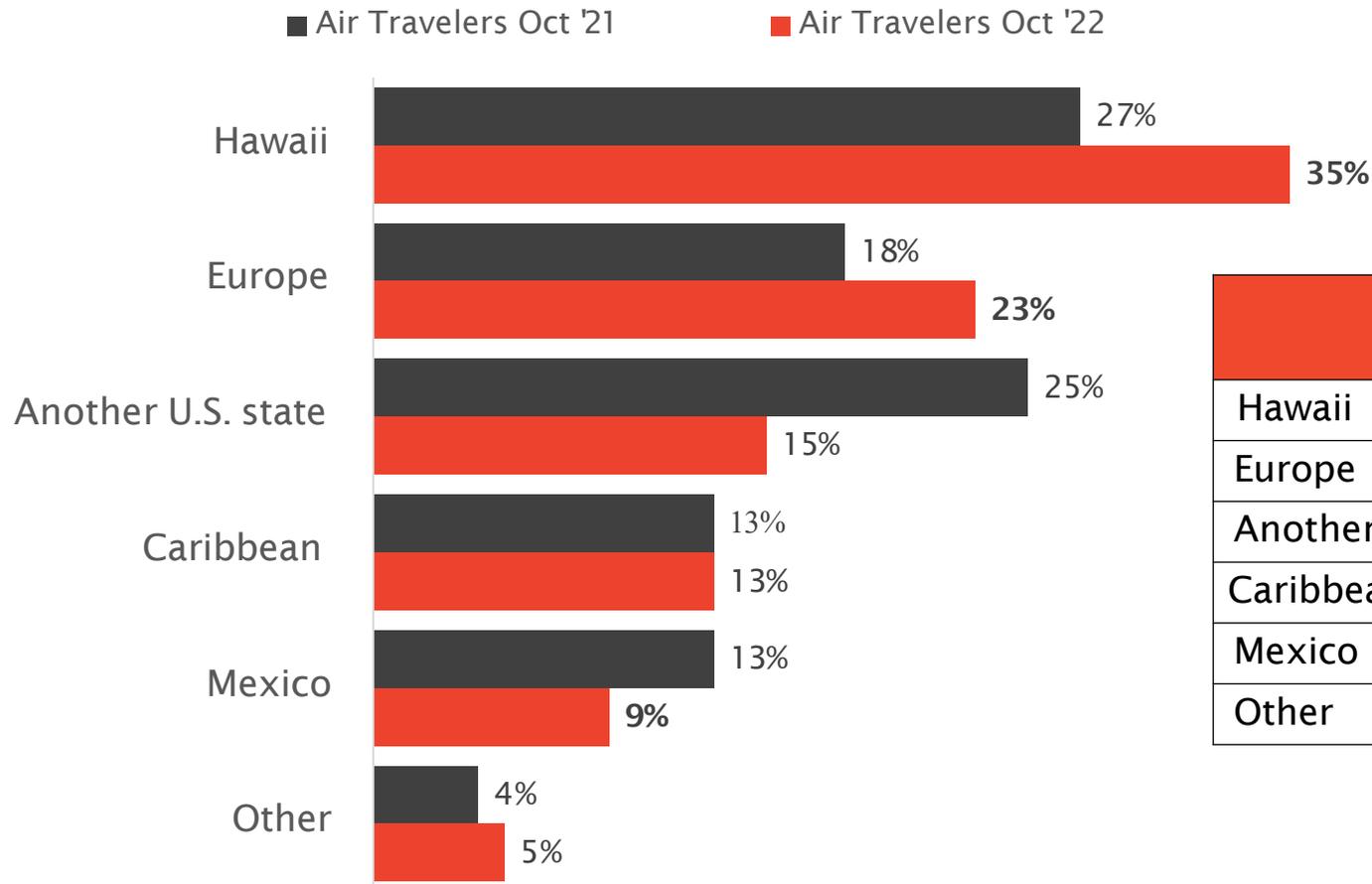
Hawaii Tourism Proprietary Questions

Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Compared to Oct '21, Significantly More Air Travelers Are Interested in Visiting Hawaii and Europe When They Feel Safe To Take A Long-Haul Flight Again.



Top Destinations of Interest Once Perceived Safe to Take a Long-Haul Flight Again

	U.S. Leisure Travelers	Air Travelers	Likely To Visit Hawaii
Hawaii	19%	19%	35%
Europe	15%	19%	23%
Another U.S. state	38%	33%	15%
Caribbean	12%	13%	13%
Mexico	8%	10%	9%
Other	9%	6%	5%

Data in bold indicates a significant difference from October 2021.

Base: U.S. Leisure Travelers (n=3,494), Air Travelers (n=1,616), Likely to Visit Hawaii (n=786)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Traveling With A Significant Other Continues To Be The Most Popular Type of Travel Party Composition For Likely Hawaii Visitors.

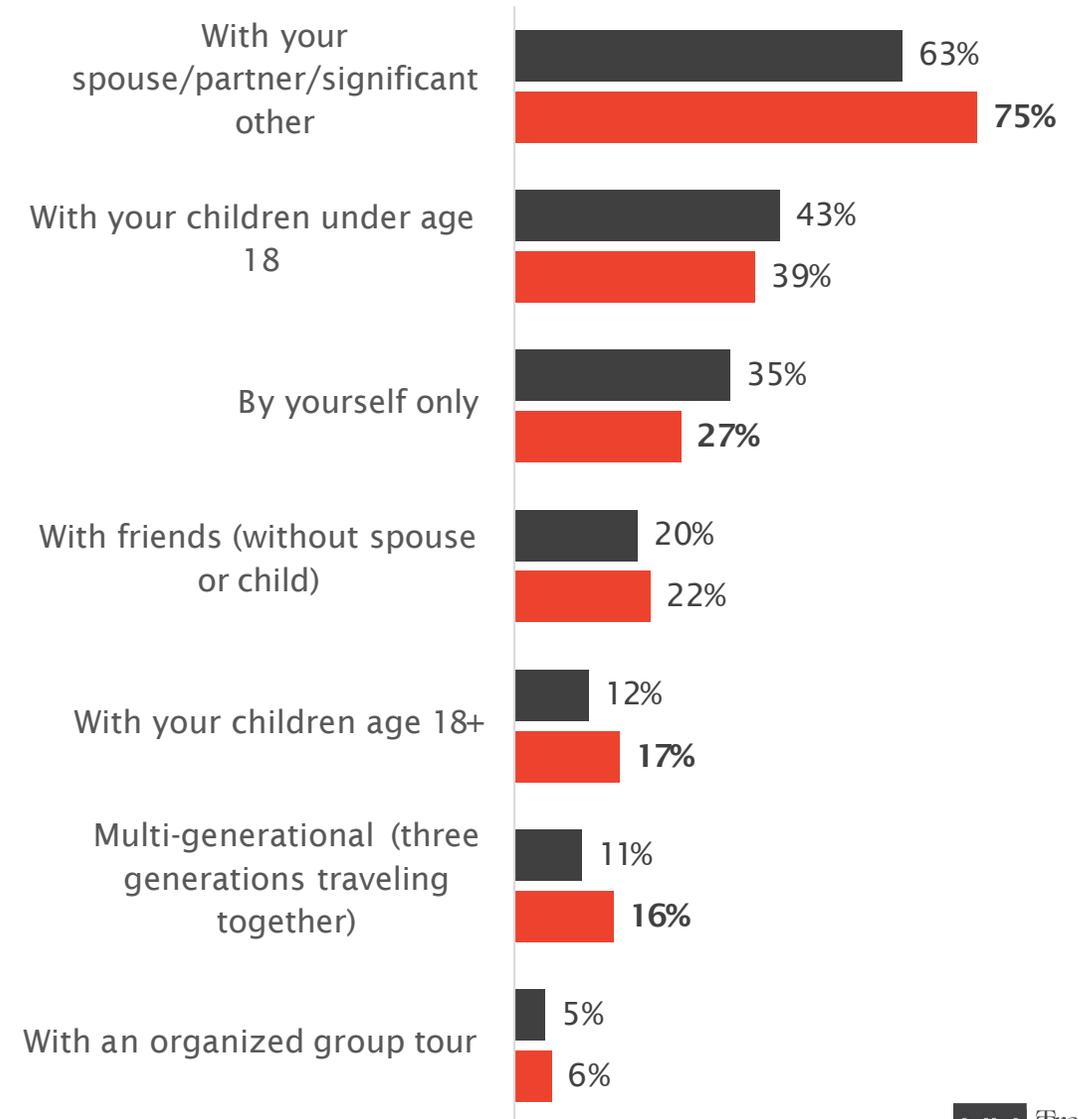
Data in bold indicates a significant difference from October 2021.

Base: Likely Hawaii visitors who intend to travel during the next six months (n=715)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Winter Edition"

Travel Party During Next Six Months

■ Oct '21 ■ Oct '22



Vacation Motivators & Activities

Significantly More Likely Hawaii Visitors Are Planning to Take a Domestic Flight, Visit Friends and Family, Stay in a Hotel/Resort or Vacation Rental, or Travel by Personal Car in The Next 6 Months Than Planned To Do So in October '21.

Data in bold indicates a significant difference from October 2021

Base: Likely Hawaii visitors who intend to travel during the next six months (n=715)

Source: MMGY Global's 2022 *Portrait of American Travelers* "Winter Edition"

Travel Expectations in the Next 6 Months

■ Oct '21 ■ Oct '22

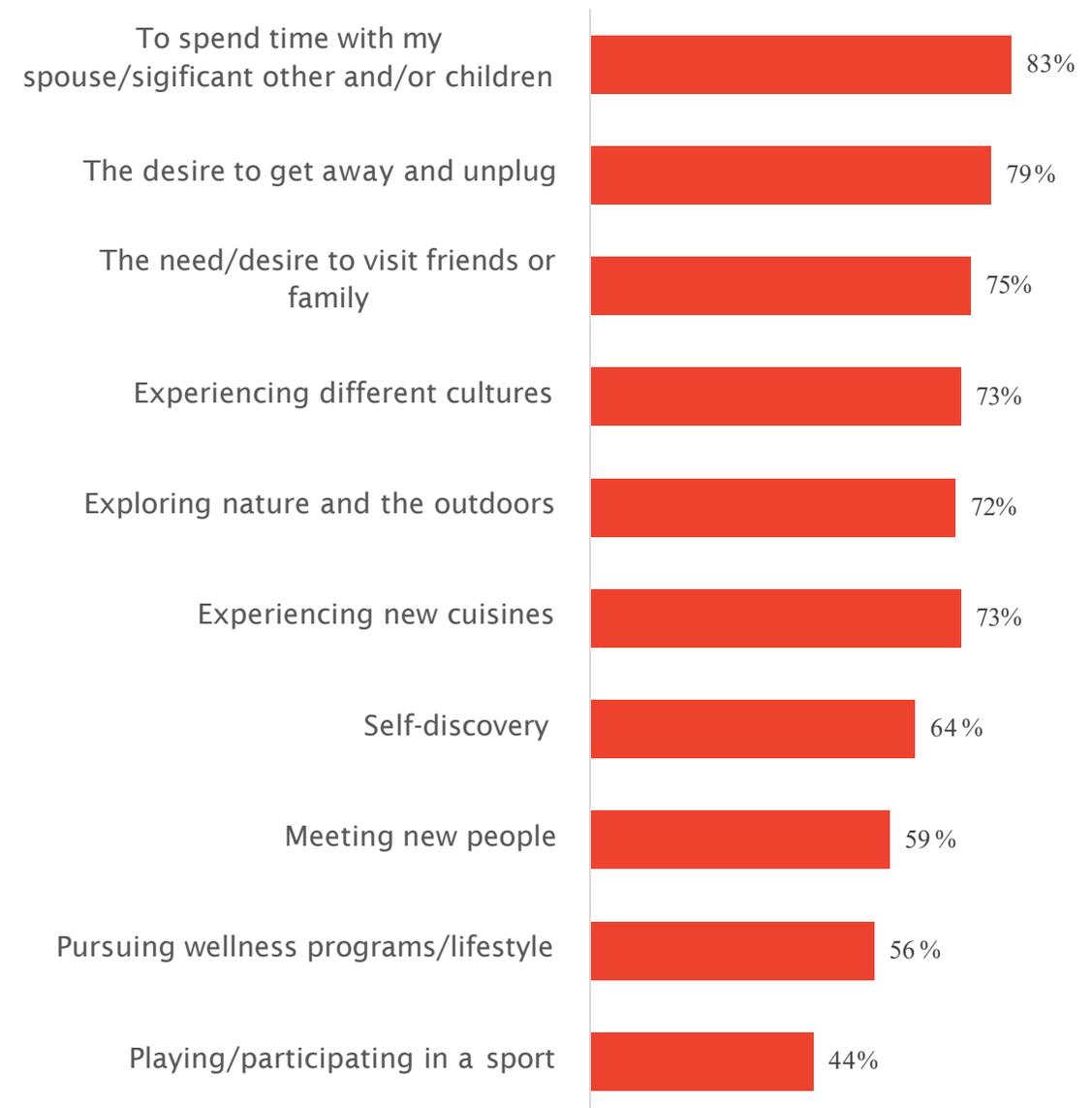


Vacation Motivators & Activities

Spending Time With Significant Other and/or Children, the Desire to Get Away and Unplug, and the Desire to Visit Friends/Family Are The Top Reasons Those Likely to Visit Hawaii Travel.

Base: Likely to Visit Hawaii (n=786)
Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

Vacation Motivators



Vacation Motivators & Activities

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Oct '21	Oct '22
Beautiful scenery	55%	72%
Food and drink scene	49%	61%
Safety	50%	53%
Historical significance of the destination	37%	52%
Outdoor/nature activities	37%	49%
A sense of tradition (place family has traditionally visited)	25%	39%
Focus on family activities	29%	33%
The ethnic diversity and multicultural population of a destination	25%	31%
Music scene	25%	30%
The destination's reputation for environmental responsibility	24%	26%
Nightlife/bars	23%	26%
The destination's commitment to social justice and equality	20%	23%
LGBTQ+ travel offerings	11%	9%

Data in bold indicates a significant difference from October 2021.

/ Beautiful scenery is the top feature travelers look for when selecting a destination. Compared to last year, significantly more likely Hawaii visitors are also influenced by the food and drink scene, the historical significance when selecting a destination, outdoor/nature activities, a sense of tradition, the ethnic diversity of a destination, and the music scene.

Activities of Interest on Vacation

	Oct '21	Oct '22
Beach experiences	43%	53%
Historical sites	37%	49%
Shopping	38%	48%
Visiting a museum	32%	48%
Visiting a state or national park	35%	47%
Visiting notable architectural sites	30%	40%
Visiting a zoo or aquarium	NA	39%
Hiking/climbing/biking/other outdoor adventures	27%	39%
Visiting a theme or amusement park	28%	38%
Dining Cruise (2022+)	NA	37%
Guided tours with access to local experiences that are otherwise inaccessible	26%	35%
Adventure travel	25%	35%
Attending a concert/music festival	23%	33%
Nightlife	27%	32%
Exploring family's ancestry/past on a heritage vacation	24%	30%
Dinner Theatre (2022+)	NA	30%
Spa services	23%	29%
Attending a sporting event	19%	27%
Casino gambling	23%	26%
Camping (2022+)	NA	26%
Water sports	22%	24%
Attending performing arts events	17%	24%
Film/art festivals	22%	21%
Snow skiing/snowboarding	14%	19%
Playing golf	19%	17%
Scuba diving	15%	17%
Playing tennis	13%	13%
Surfing	11%	13%

/ Beach experiences, historical sites, shopping, and visiting a museum are the top activities of interest among likely Hawaii visitors on vacation.

/ Many activities are of significantly greater interest compared to last year, including interest in beach experiences, historical sites, shopping, visiting a museum, visiting a state or national park, and visiting notable architectural sites.

Data in bold indicates a significant difference from October 2021.

Base: Likely to Visit Hawaii (n=786)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Winter Edition"

California, Florida, Colorado, Alaska and New York Are The Other Top States of Interest Among Likely Hawaii Visitors

Top 20 States of Interest	Oct '21	Oct '22
California	76%	71%
Florida	75%	70%
Colorado	67%	68%
Alaska	67%	67%
New York	66%	66%
Washington	59%	60%
Arizona	64%	57%
Texas	62%	57%
Nevada	60%	56%
Tennessee	55%	49%
Massachusetts	54%	48%
Oregon	53%	48%
Georgia	52%	48%
Montana	51%	48%
North Carolina	60%	47%
Maine	57%	47%
South Carolina	55%	45%
Wyoming	53%	45%
Louisiana	53%	45%
Michigan	49%	45%

Destinations of Interest

Base: Likely to Visit Hawaii (n=786)

Data in bold indicates a significant difference from October 2021.

Other Than Hawaii Destinations, Likely Hawaii Visitors Are Also Interested in Visiting New York City and San Diego.

	Oct '21	Jul '22
Island of Hawai'i (Big Island)	77%	79%
Honolulu, HI (including Waikiki)	76%	77%
Maui, HI	73%	77%
Kaua'i HI	70%	76%
New York City, NY	65%	67%
San Diego, CA	66%	66%
San Francisco, CA	67%	65%
Las Vegas, NV	73%	64%
Florida Keys/Key West, FL	66%	64%
Niagara Falls, NY	59%	61%
Los Angeles, CA	64%	61%
Orlando, FL	67%	60%
Miami, FL	67%	59%
Napa Valley, CA	62%	59%
Washington, DC	61%	59%
New Orleans, LA	65%	58%
Seattle, WA	58%	58%
Tampa, FL	61%	58%
Denver, CO	58%	57%
Palm Springs, CA	61%	57%

Destinations of Interest

Base: Likely to Visit Hawaii (n=786)

Data in bold indicates a significant difference from October 2021.

Likely Hawaii Visitors are Also Interested in Visiting Europe, The Caribbean, and Canada.

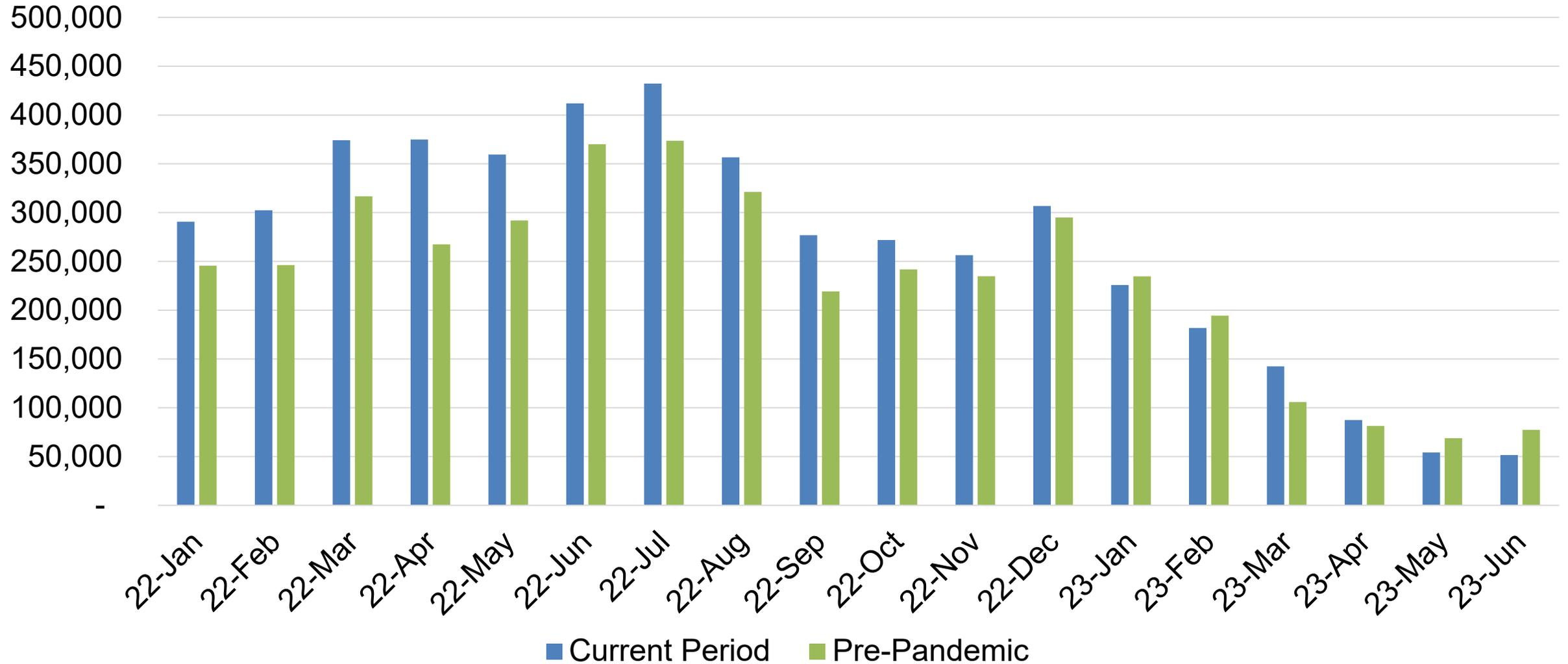
International Destinations of Interest	Oct '21	Oct '22
Europe	40%	51%
The Caribbean	33%	40%
Canada	39%	37%
Mexico	30%	36%
South America	19%	22%
Central America	18%	21%
Asia	18%	21%
Oceania	17%	18%
Middle East	8%	10%
Africa	7%	11%

Data in bold indicates a significant difference from October 2021.

Destinations of Interest

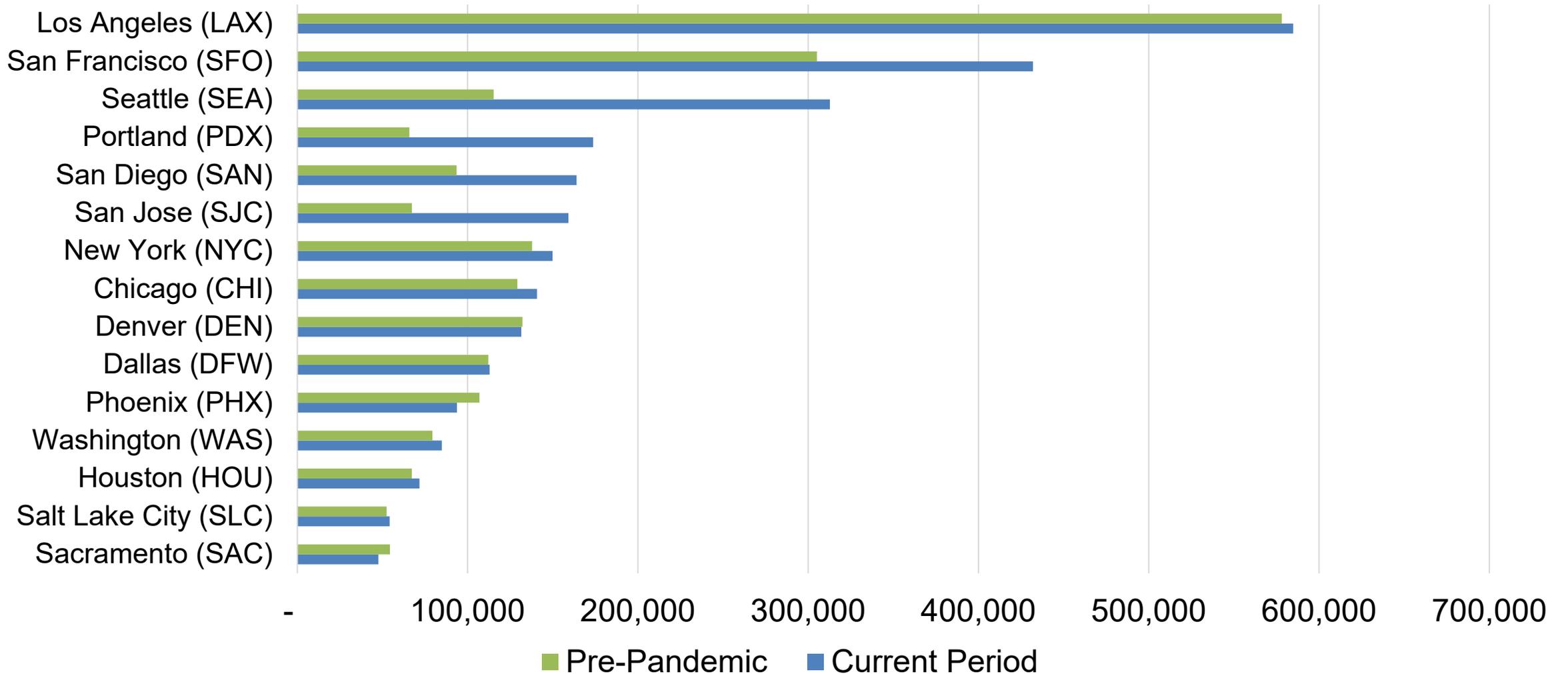
ARC/FORWARDKEYS DESTINATION GATEWAY TRENDS

Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway

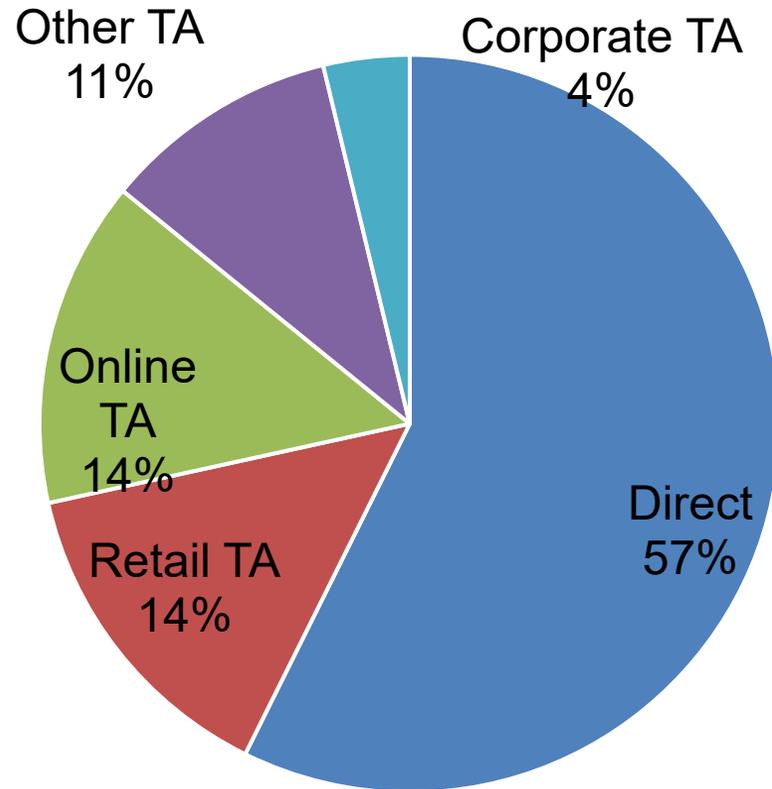
Trip Origins: United States



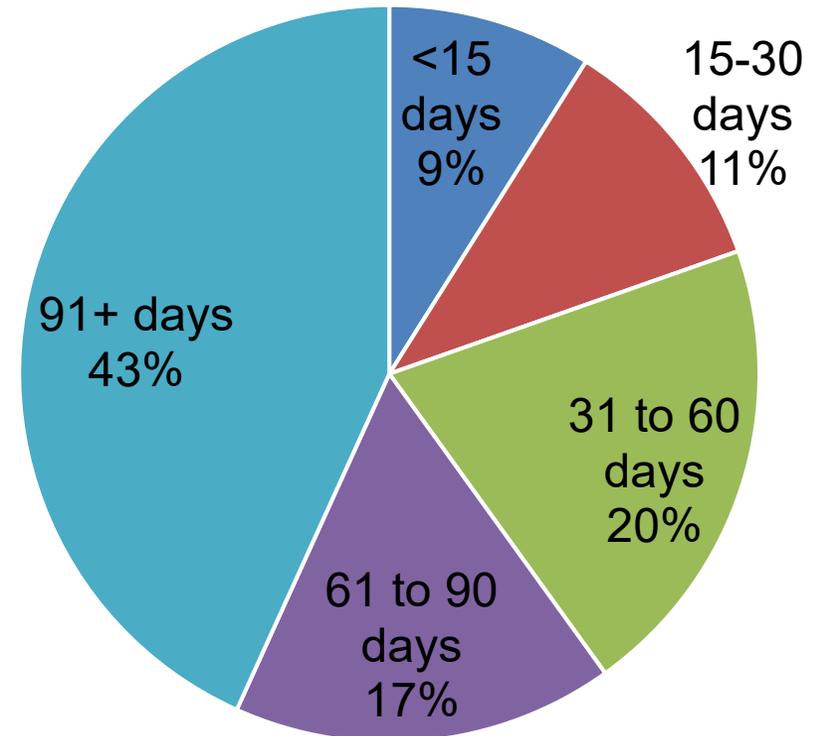
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: United States

Distribution Channel

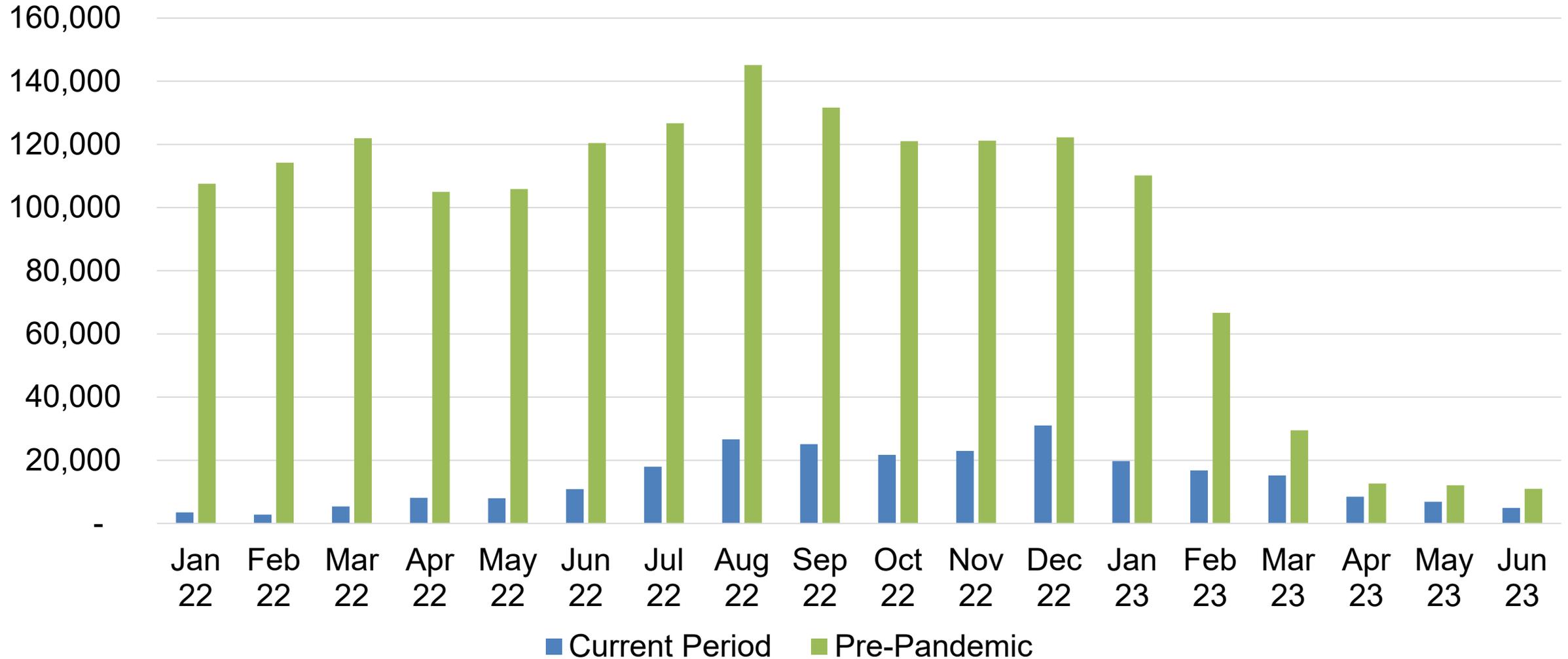


Lead Times



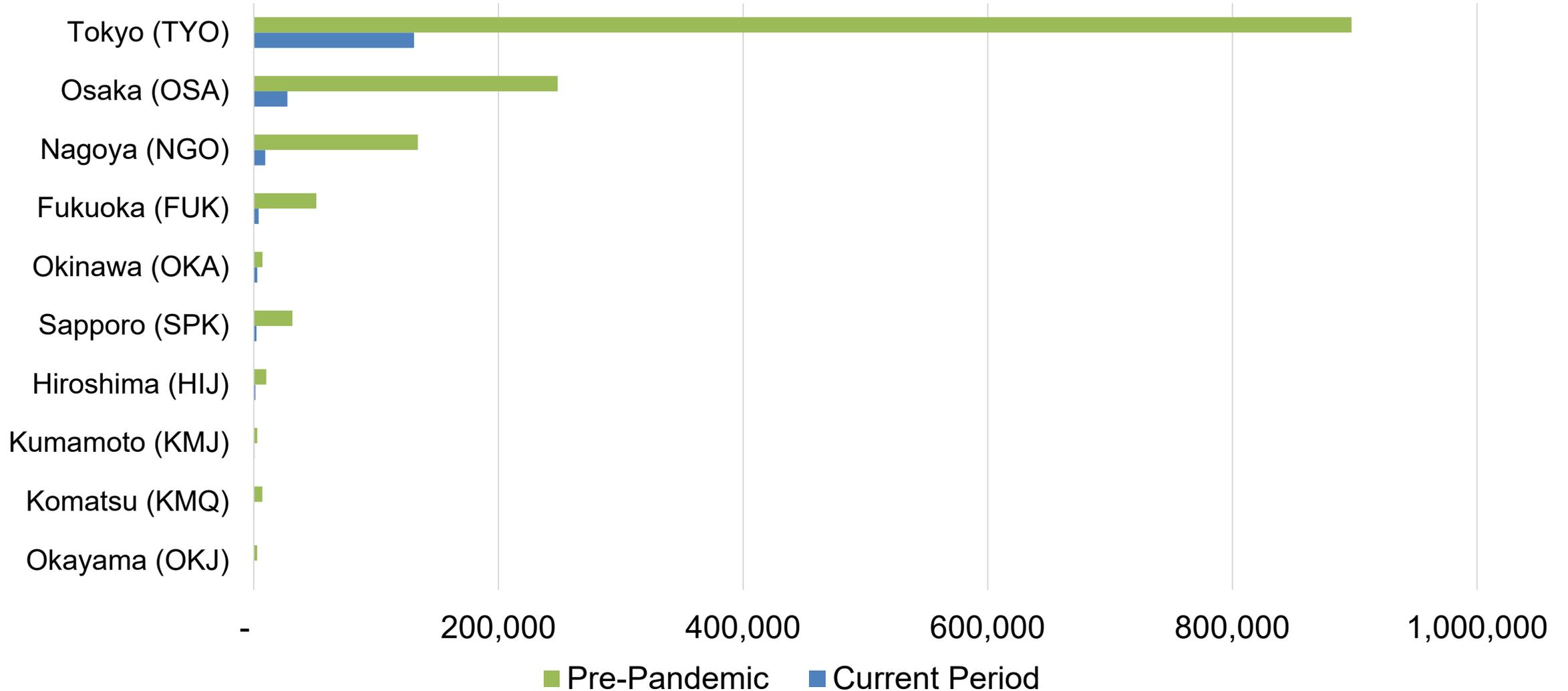
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Japan



Source: ARC/ForwardKeys Destination Gateway

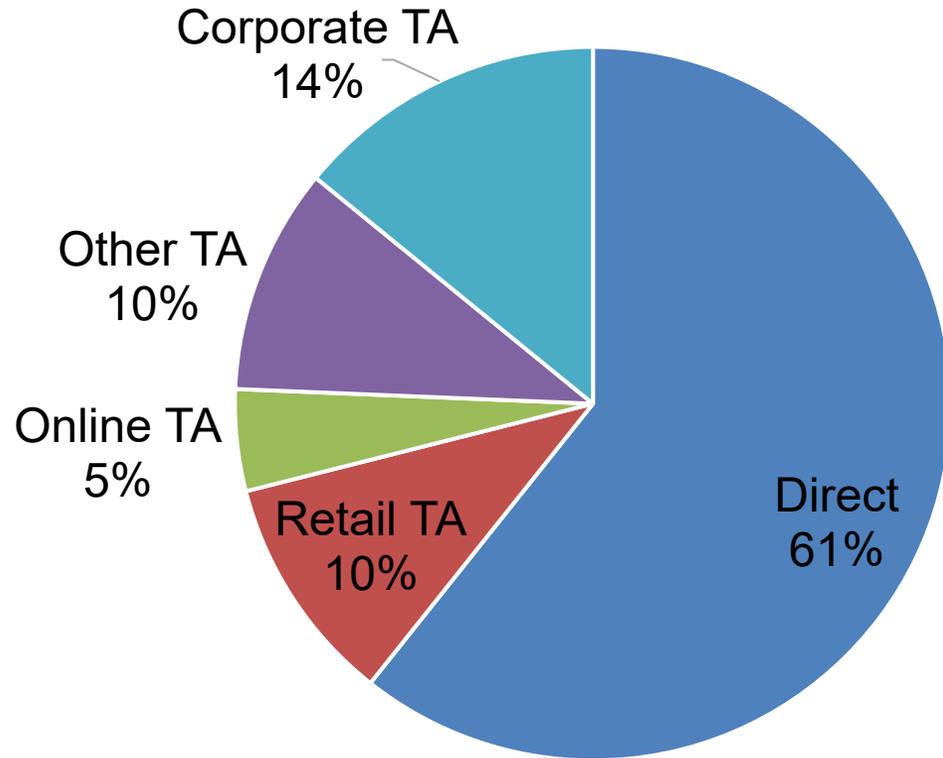
Trip Origins: Japan



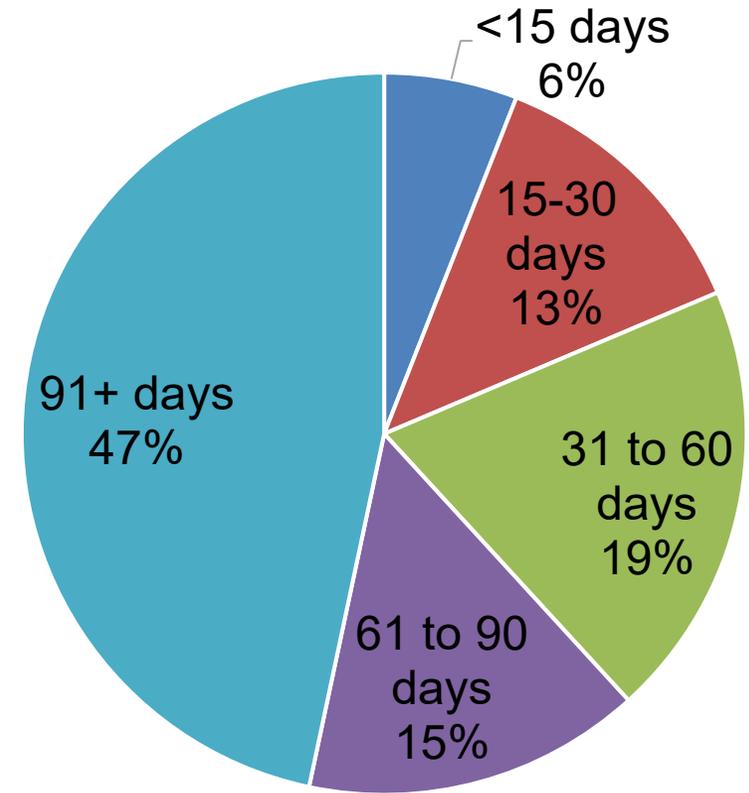
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Japan

Distribution Channel

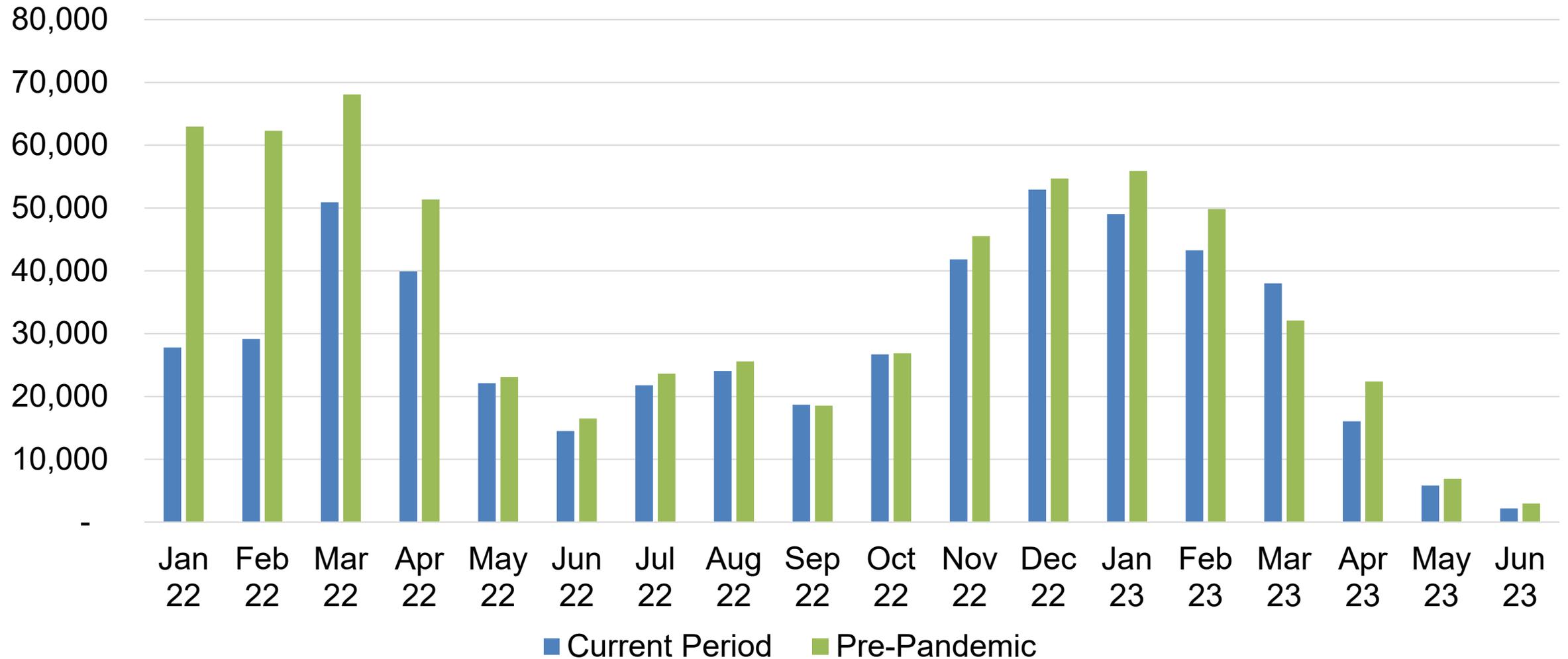


Lead Time



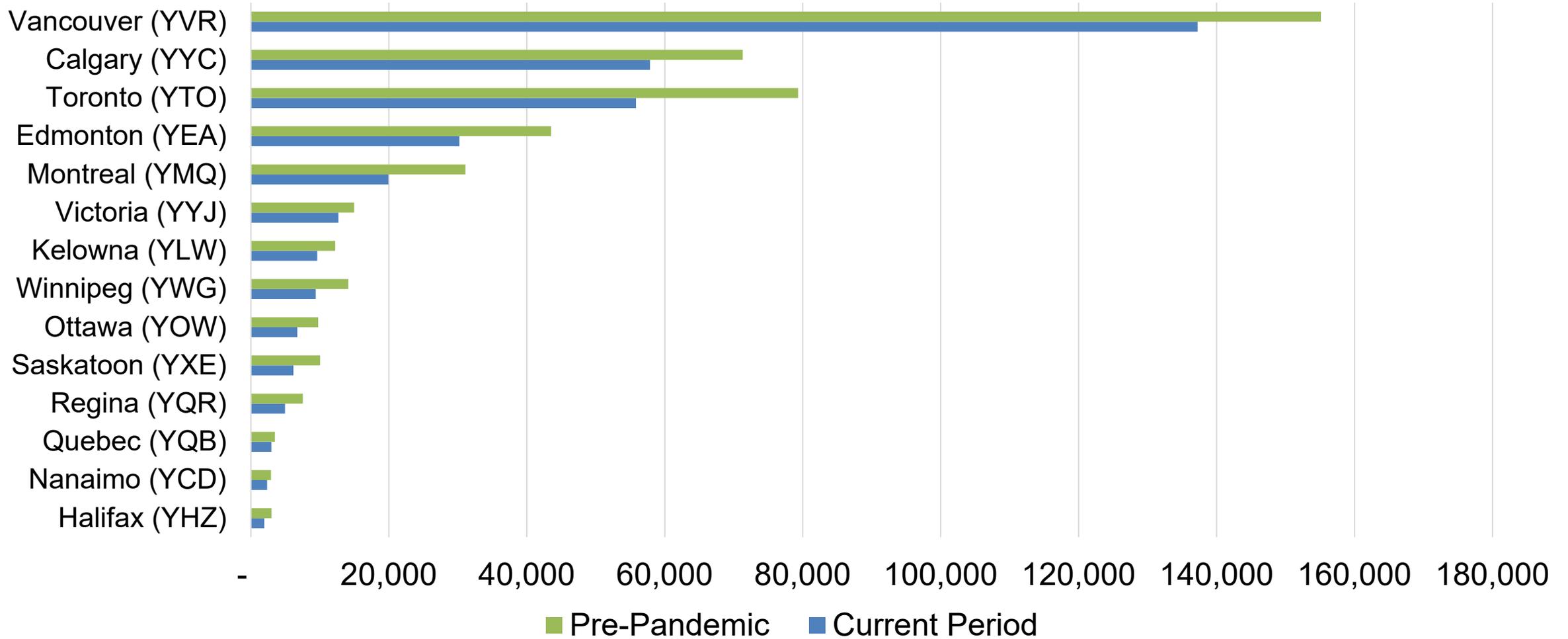
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway

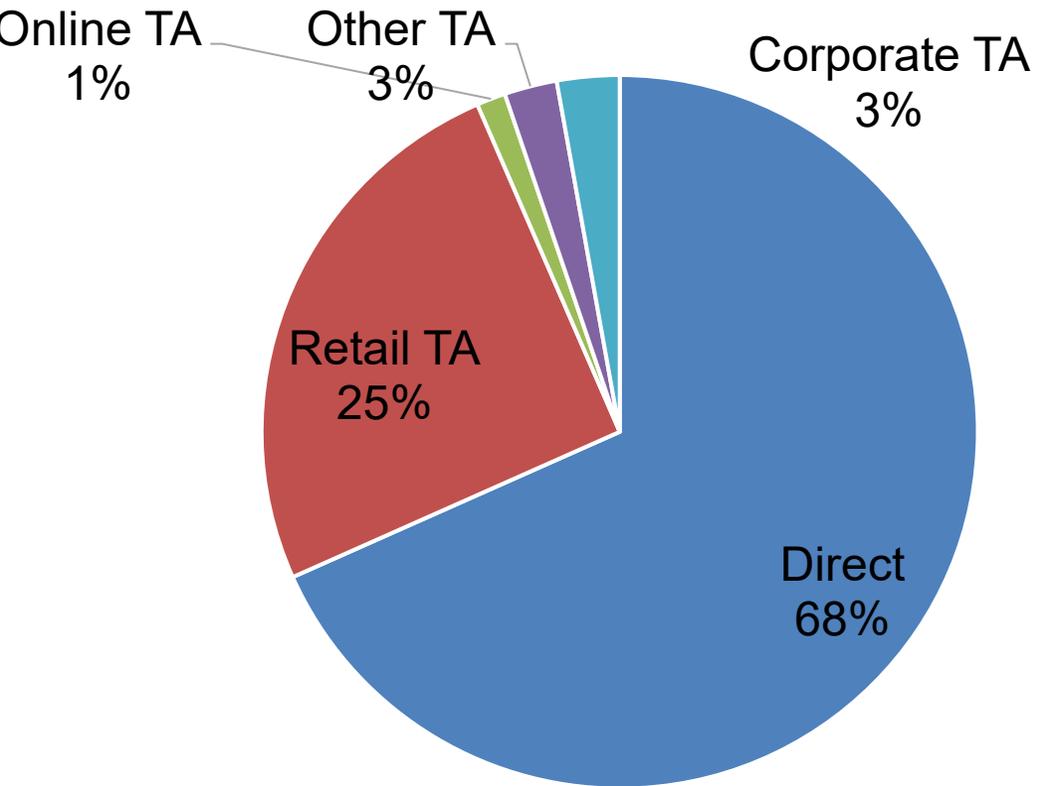
Trip Origins: Canada



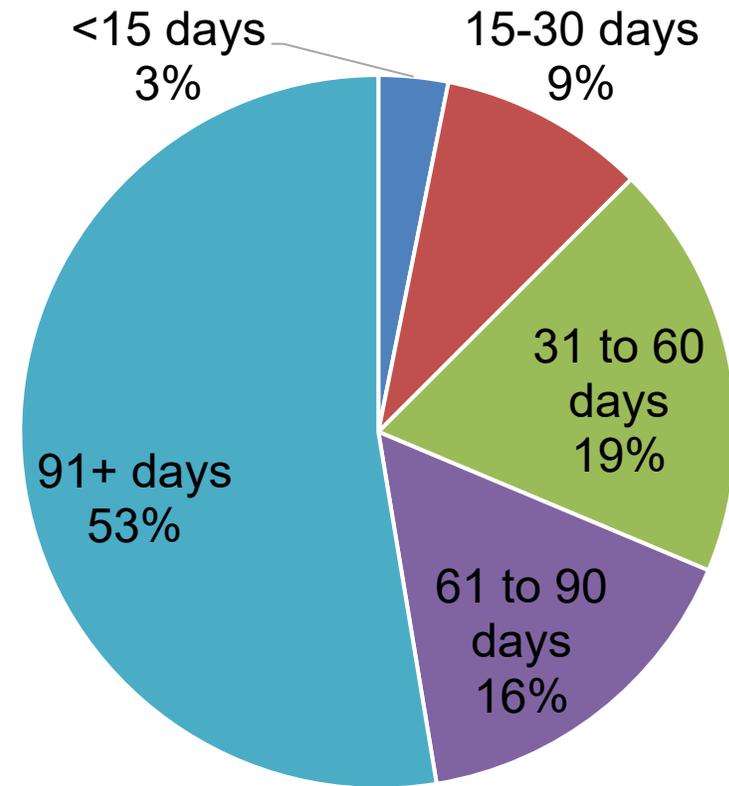
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Canada

Distribution Channel

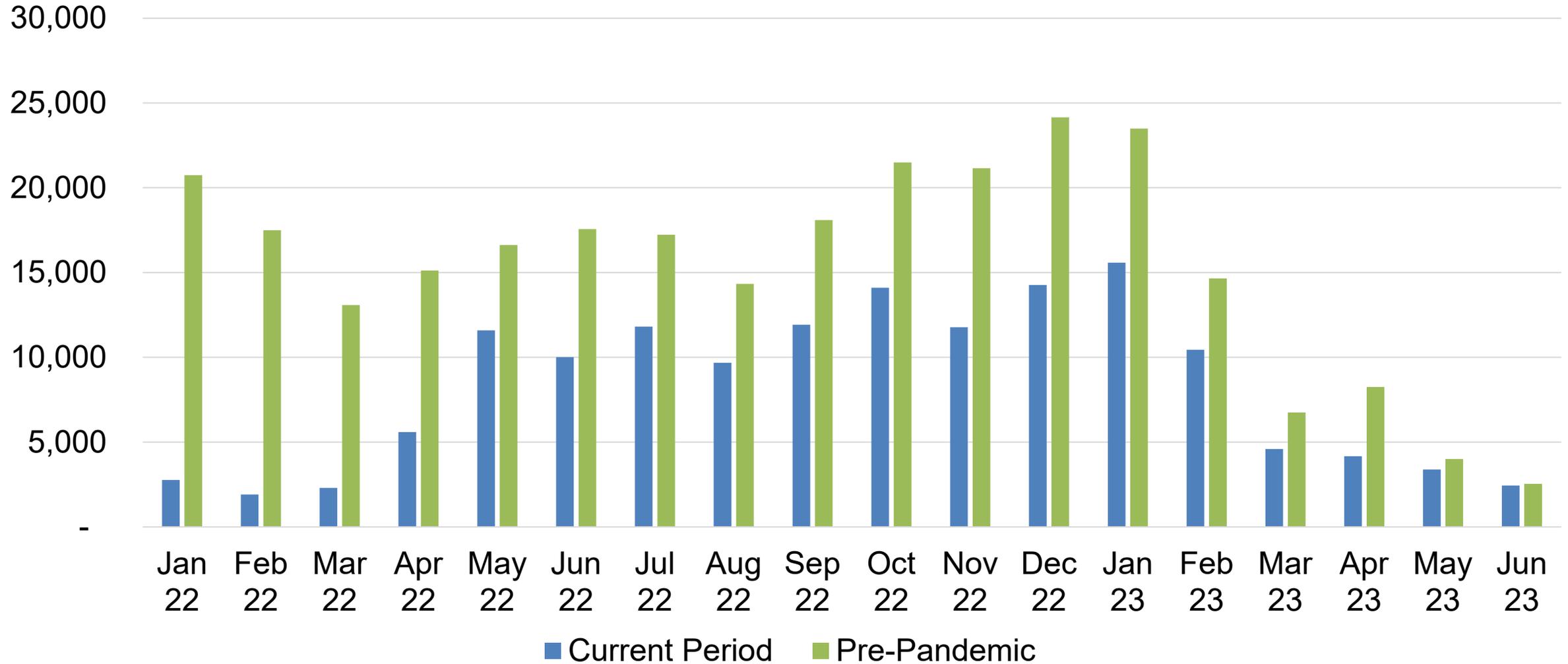


Lead Time



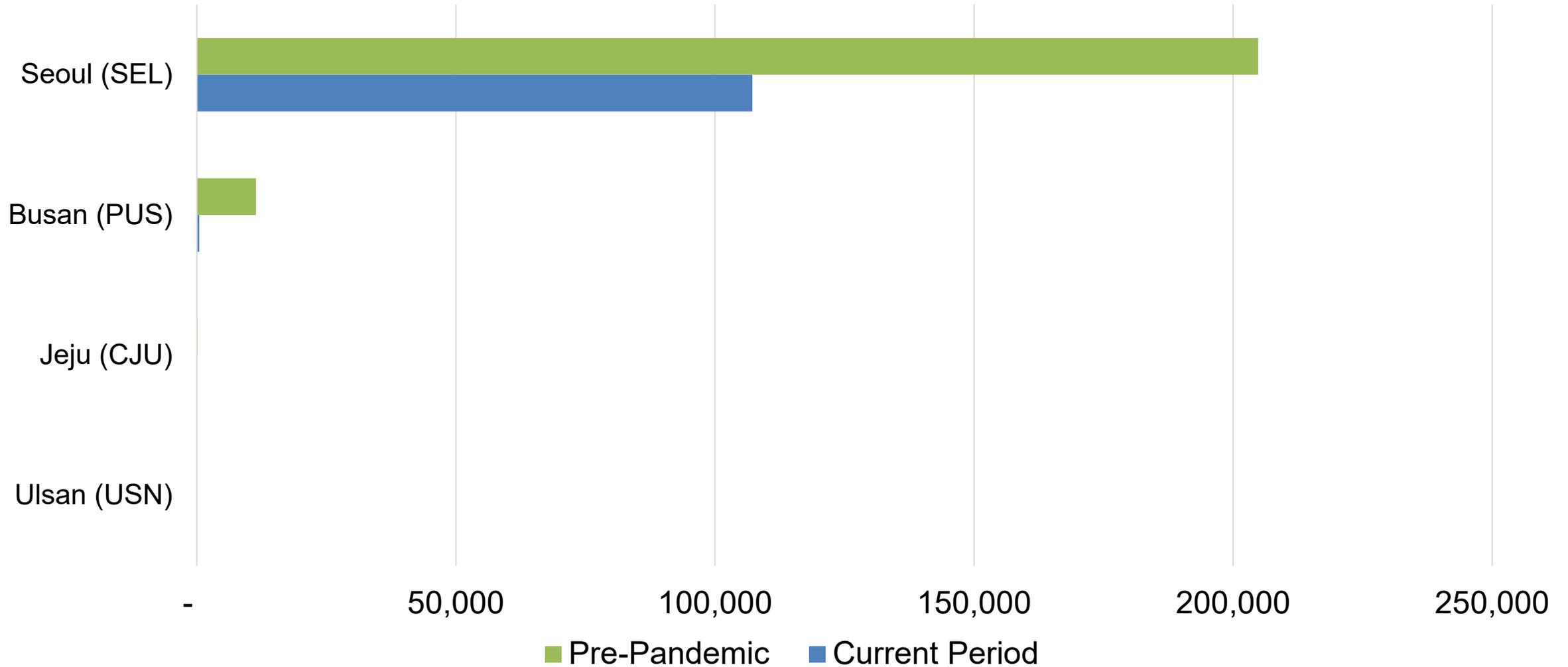
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway

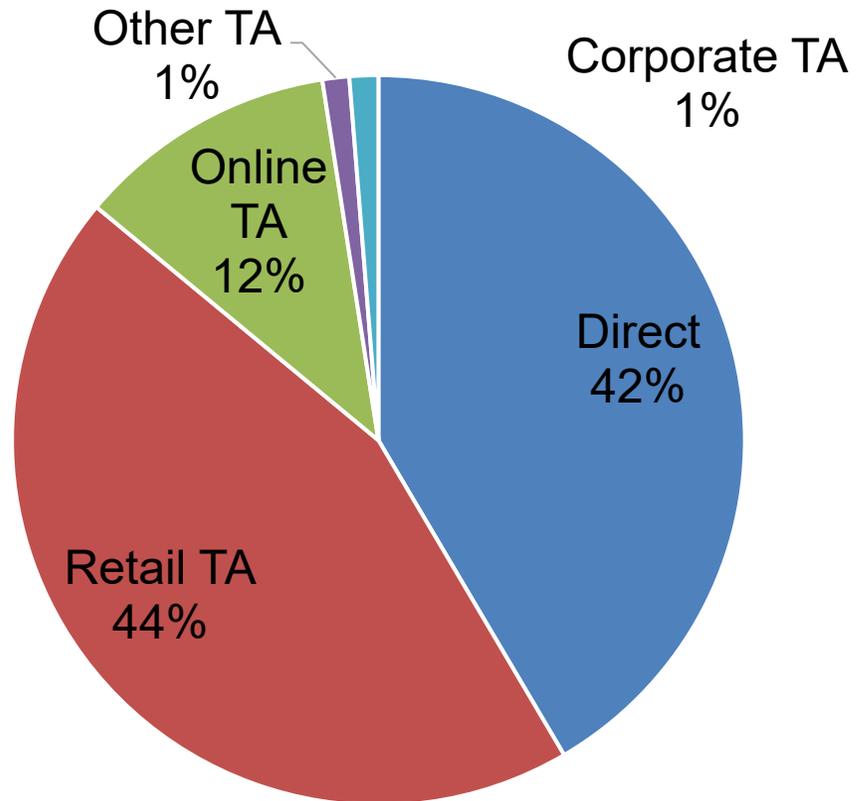
Trip Origins: Korea



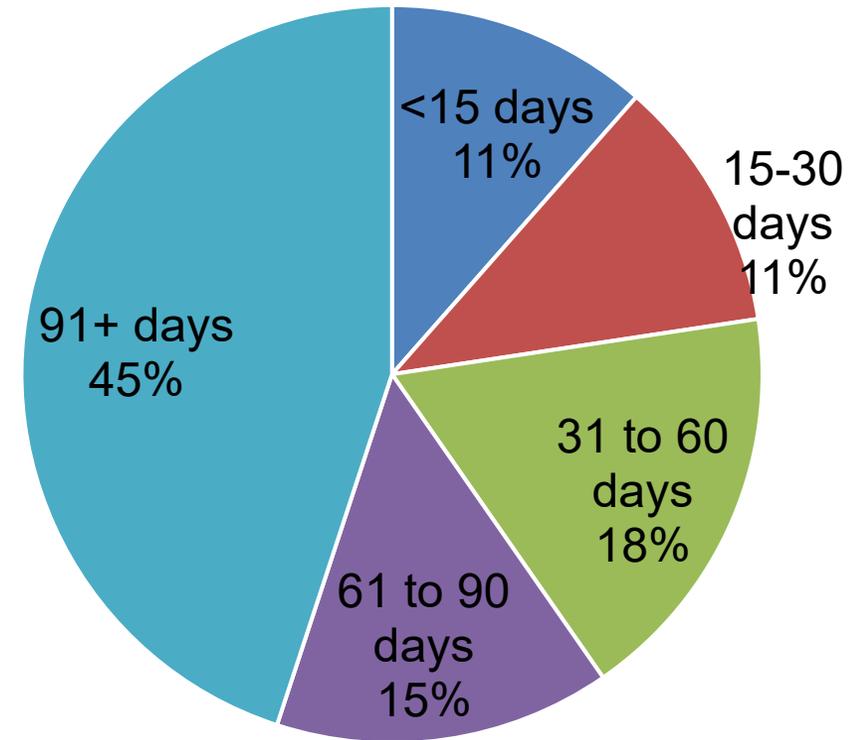
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Trip Characteristics: Korea

Distribution Channel

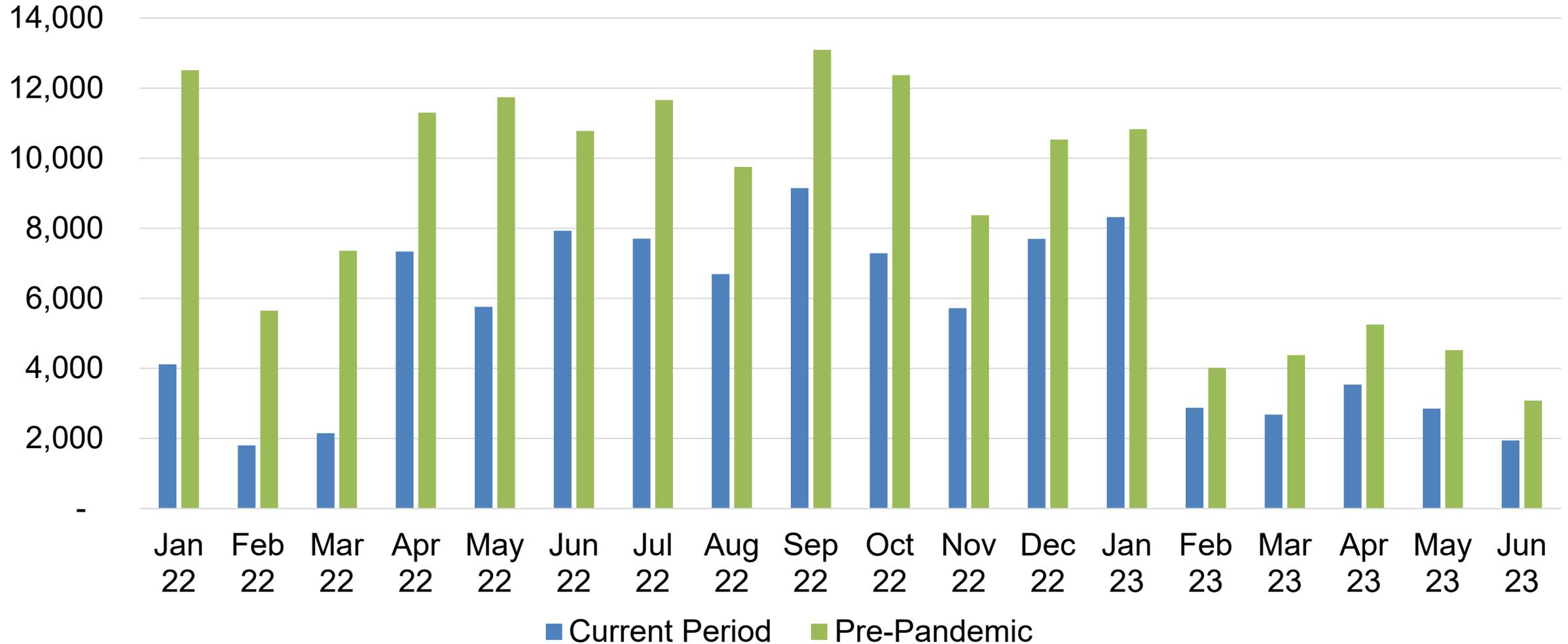


Lead Time



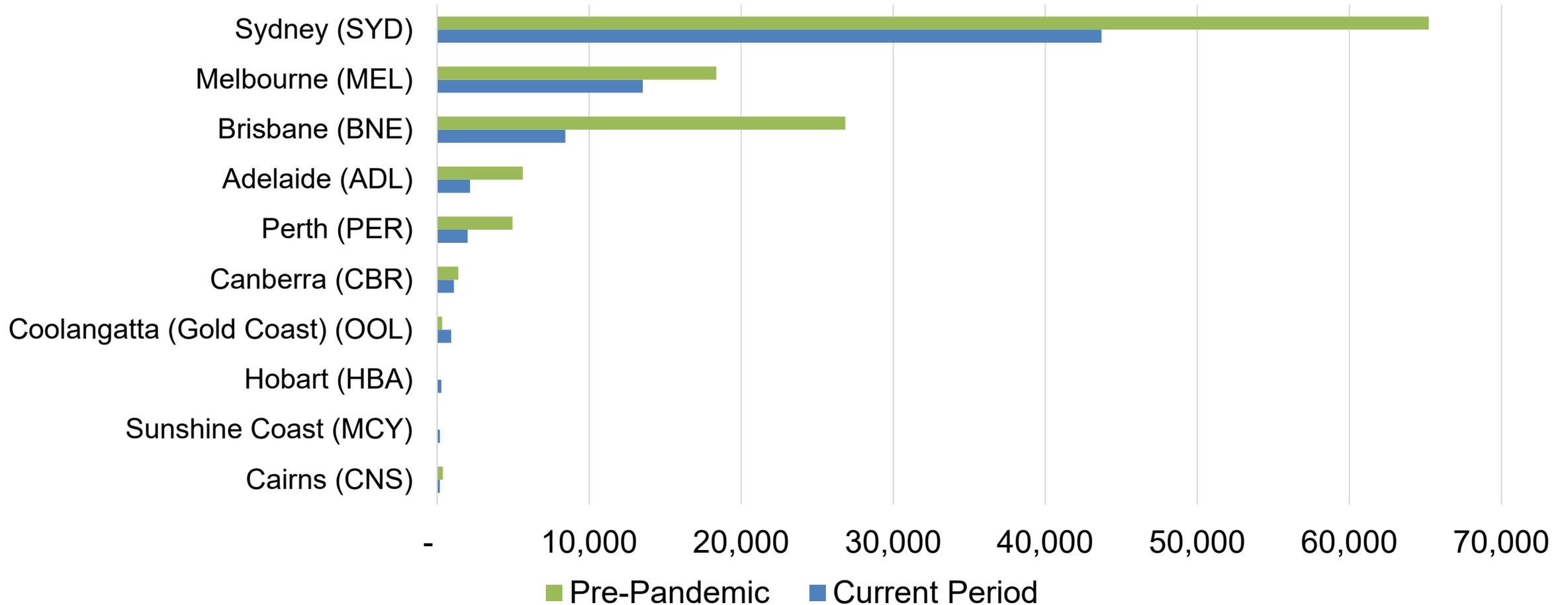
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

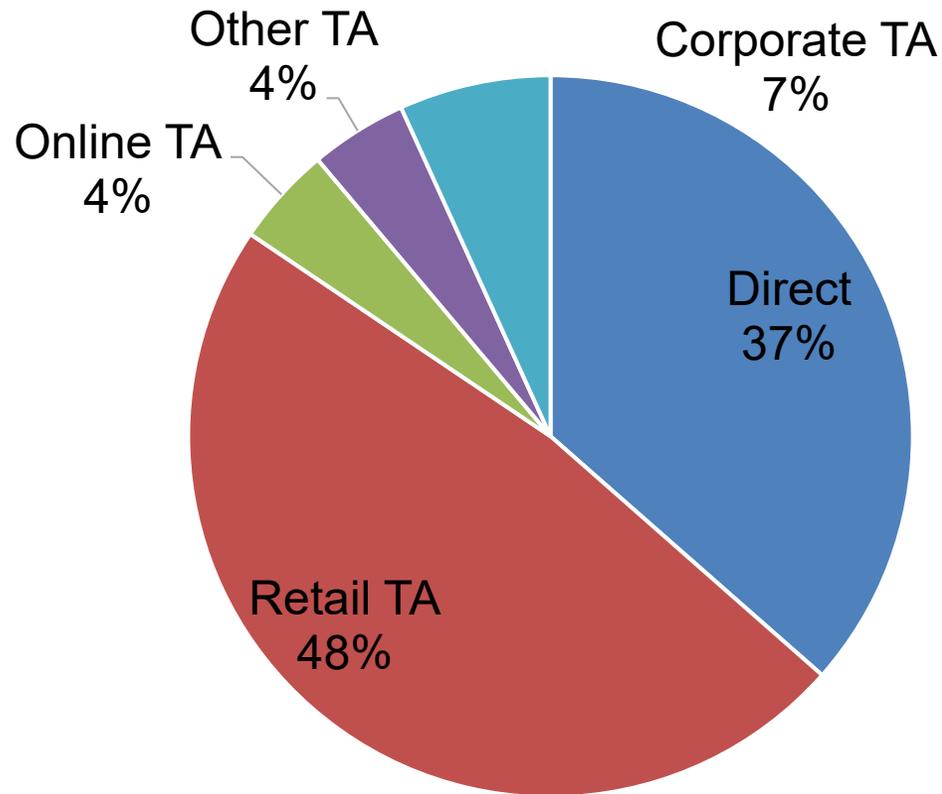
Trip Origins: Australia



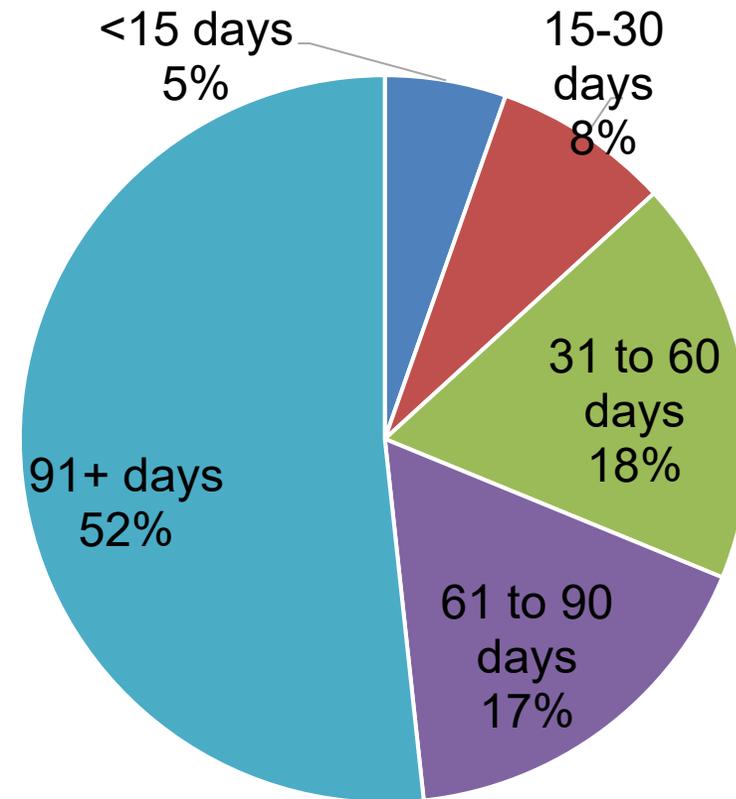
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Australia

Distribution Channel



Lead Time



Source: ARC/ForwardKeys Destination Gateway



VISION INSIGHTS

HAWAI'I TOURISM AUTHORITY BOARD MEETING

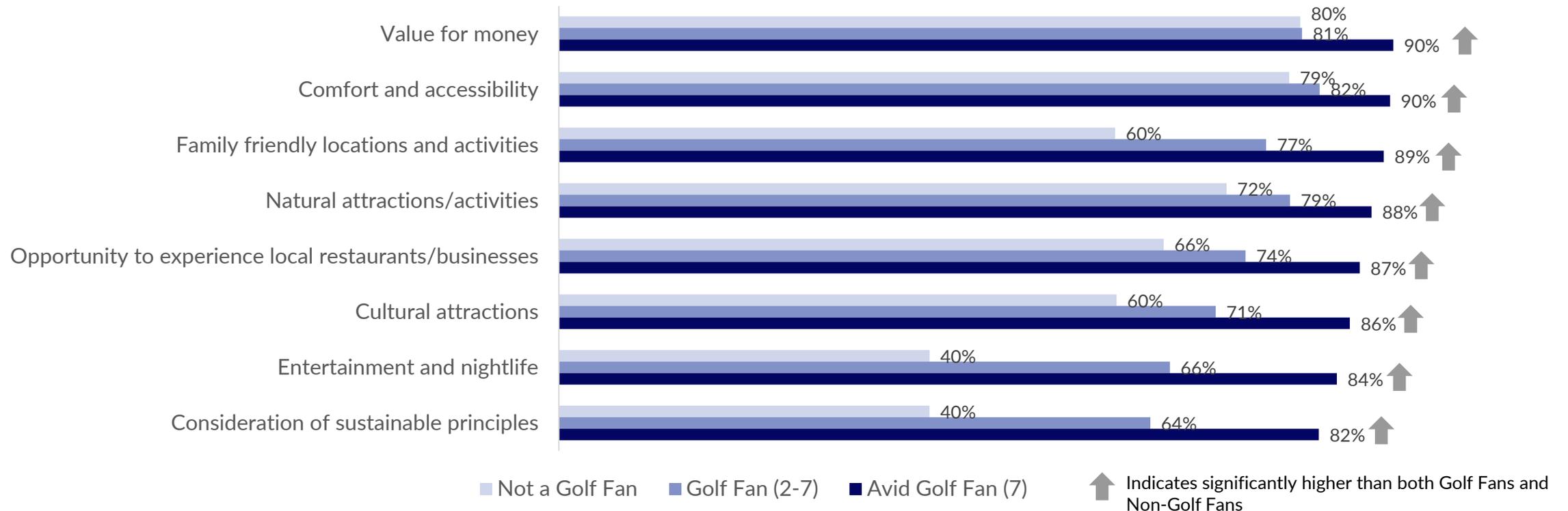
Golf Fans



Avid Golf Fans are significantly more likely to consider different factors, sustainability principles being key difference to non-golf fans (+42 pts)

Importance of Different Factors When Choosing Travel

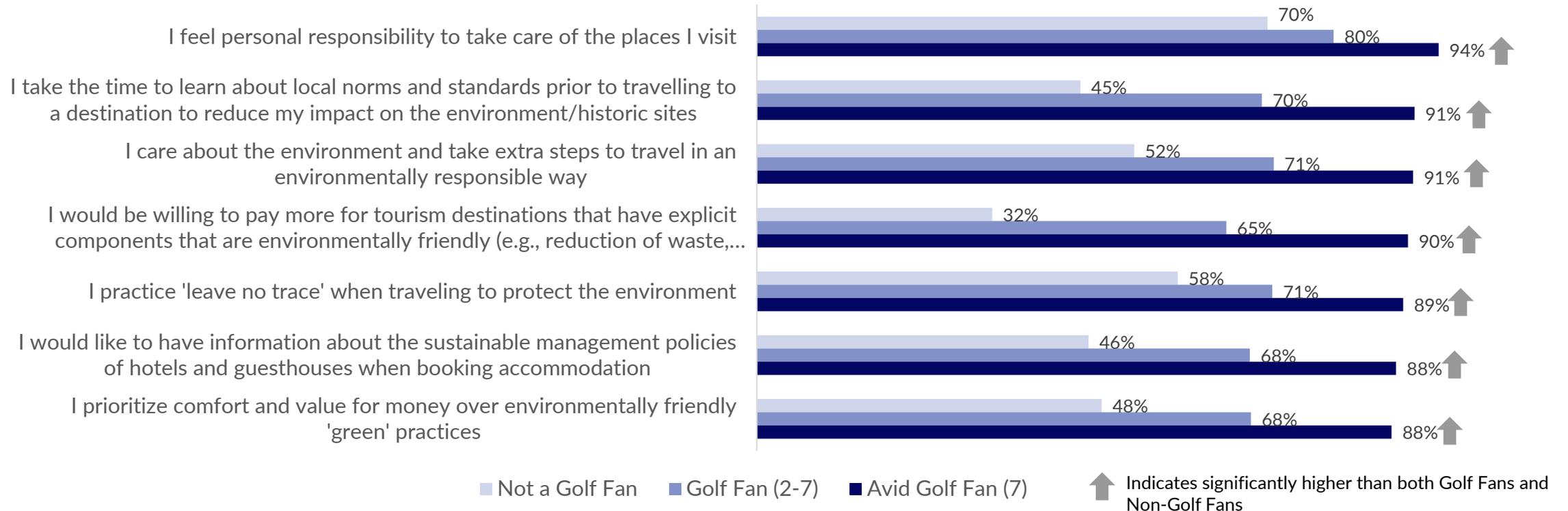
Answer: Net Important



Q15: How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important
 Sample Sizes: Not a Golf Fan n=1,060; Golf Fan (2-7) n=1,581; Avid Golf Fans (7) n=401

Going deeper into sustainability principles, avid golf fans are significantly more likely feel it's important to take care of any destination and minimize their impact

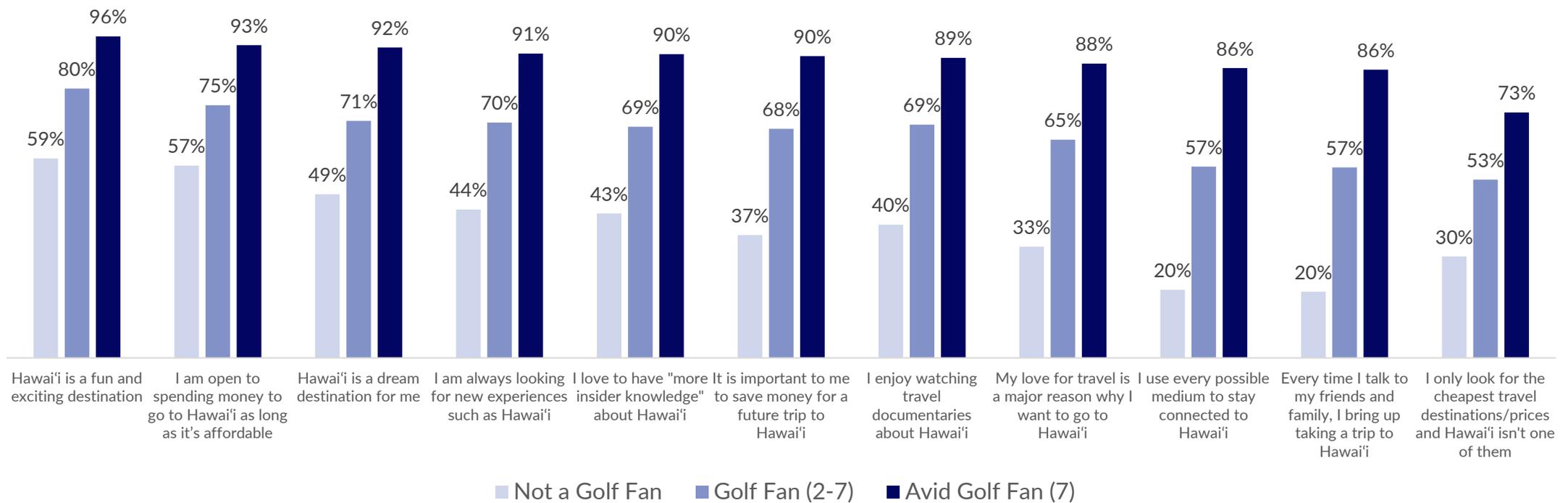
Agreement to Statements Related to Sustainability While Travelling Answer: Net Agree



Q16: Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling.
 Sample Sizes: Not a Golf Fan n=1, 060; Golf Fan (2-7) n=1,581; Avid Golf Fans (7) n=401

Very strong alignment and connection to Hawai'i as a destination amongst golf fans and avid golf fans

Agreement to Statements Related to Hawai'i as a Travel Destination
Answer: Net Agree

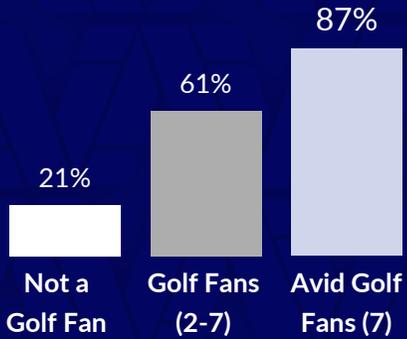


Q19: Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?
Sample Sizes: Not a Golf Fan n=1,060; Golf Fan (2-7) n=1,581; Avid Golf Fans (7) n=401

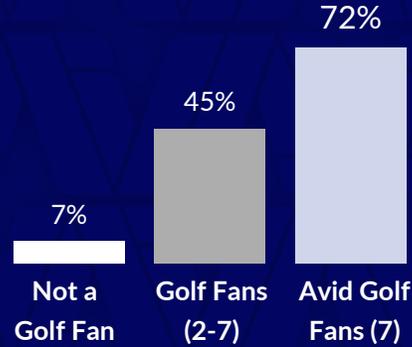
Travel Profile



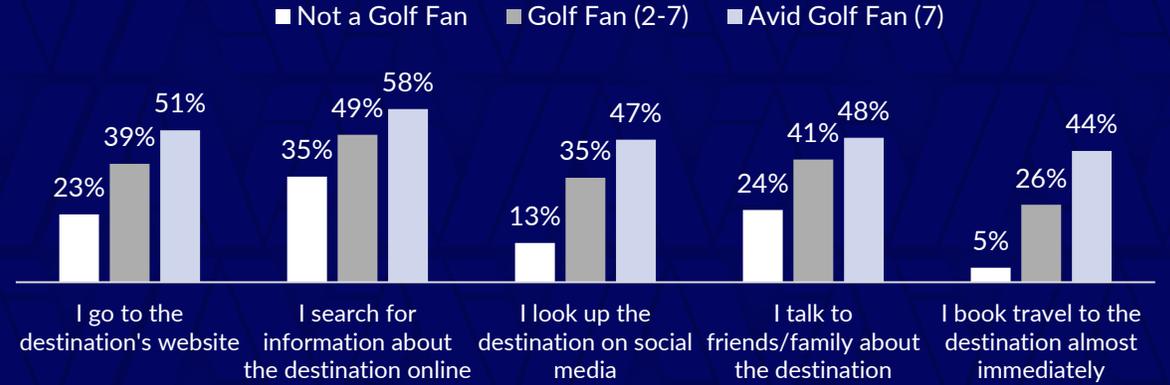
TRAVEL TO ATTEND SPORTS/ENT EVENTS



TRAVEL TO PARTICIPATE IN SPORTS EVENTS



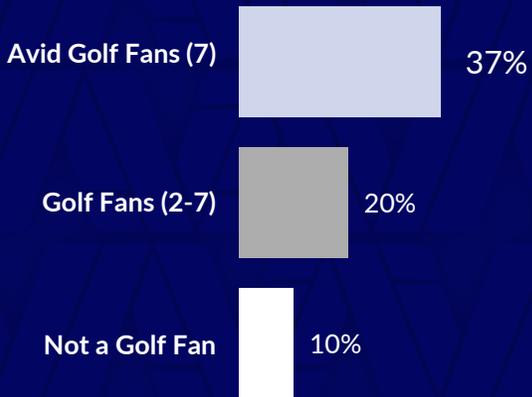
ACTIONS TAKEN AFTER SEEING A TRAVEL DESTINATION ON TV, ONLINE, THROUGH SOCIAL MEDIA ETC



Annual Vacation



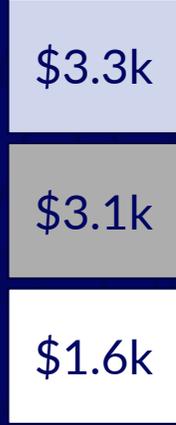
ANNUAL VACATION IS 3,000 MILES + DISTANCE



AVE # OF NIGHTS



AVE TOTAL SPEND



AVE PER PERSON PER DAY



DEMOGRAPHICS



% WITH \$100K+ INCOME



% MALE





VISION INSIGHTS

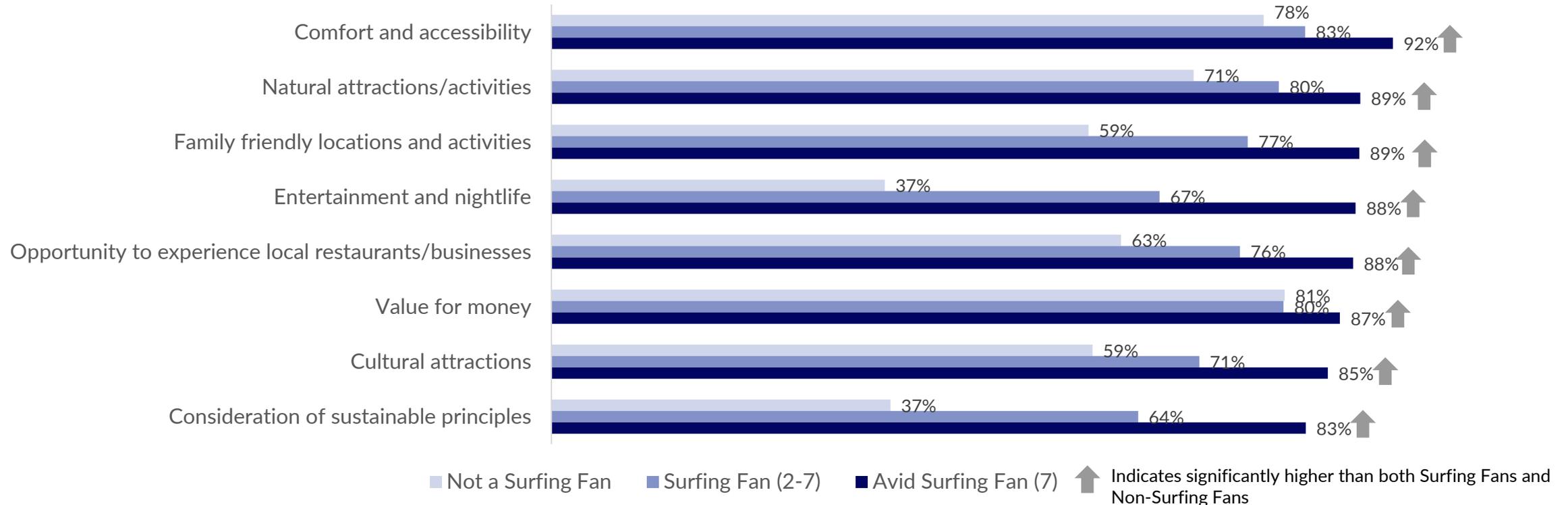
HAWAI'I TOURISM AUTHORITY BOARD MEETING

Surfing Fans



Avid surfing fans separate themselves from all fans and non-fans on the importance of each factor; Entertainment/nightlife has the largest difference to non-fans (+52 pts)

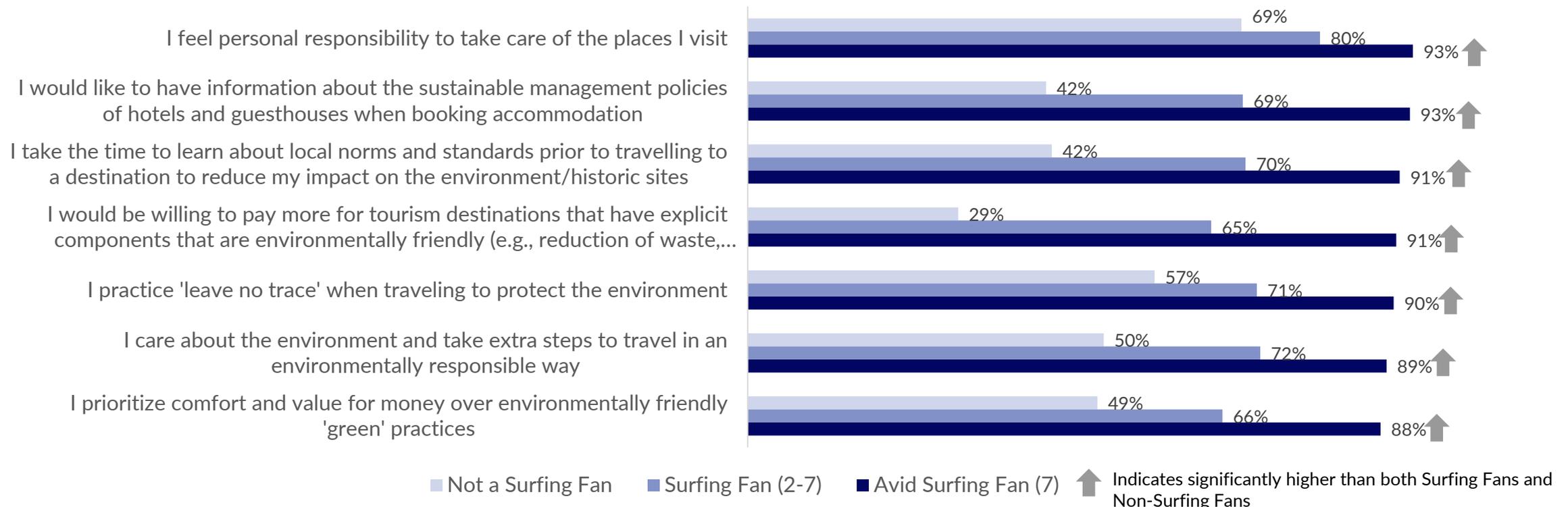
Importance of Different Factors When Choosing Travel
Answer: Net Important



Q15: How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important
 Sample Sizes: Not a Surfing Fan n=966; Surfing Fan (2-7) n=1,675; Avid Surfing Fans (7) n=349

Sustainability is very important while travelling for avid surfing fans. 9 in 10 avid fans prioritize sustainability and protecting the environment

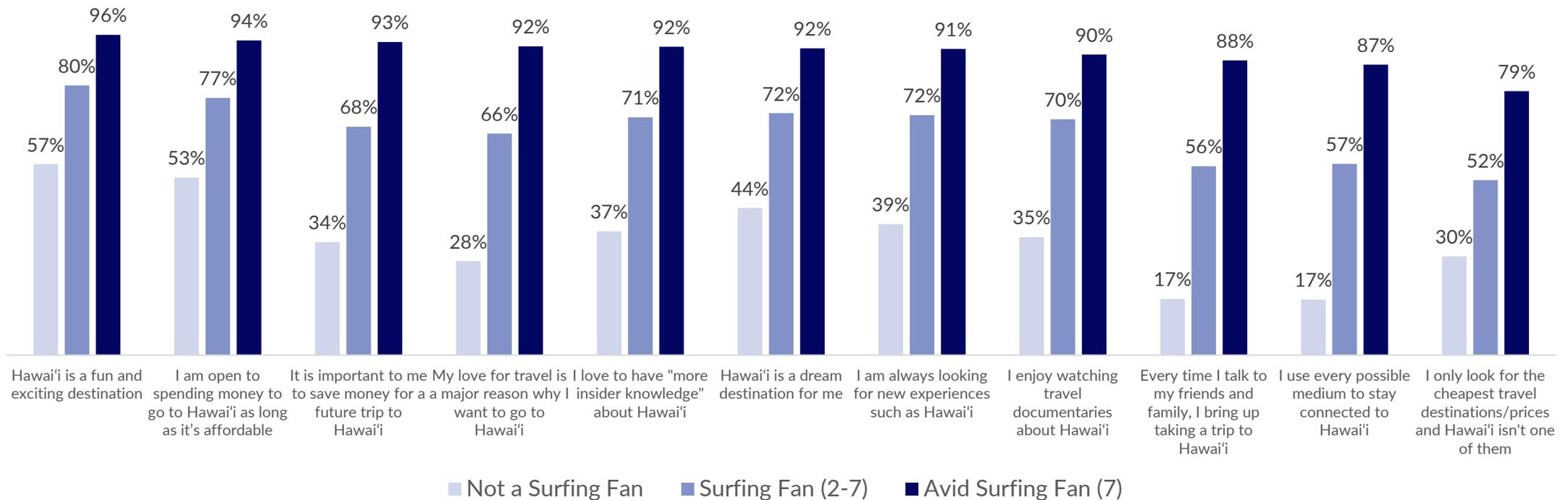
Agreement to Statements Related to Sustainability While Travelling Answer: Net Agree



Q16: Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling.
 Sample Sizes: Not a Surfing Fan n=966; Surfing Fan (2-7) n=1,675; Avid Surfing Fans (7) n=349

As a key destination on the WSL tour, Hawai'i resonates as a travel destination for avid surfing fans.

Agreement to Statements Related to Hawai'i as a Travel Destination
Answer: Net Agree

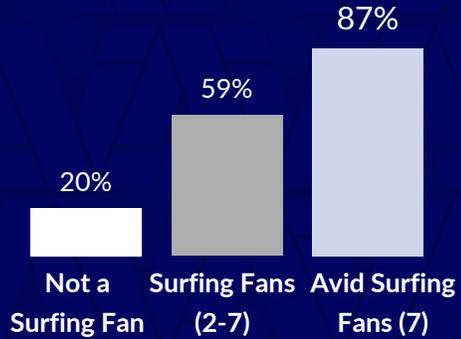


Q19: Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?
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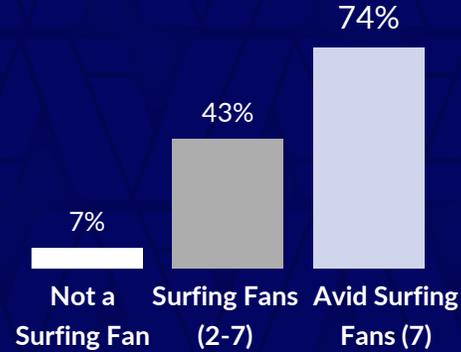
Travel Profile



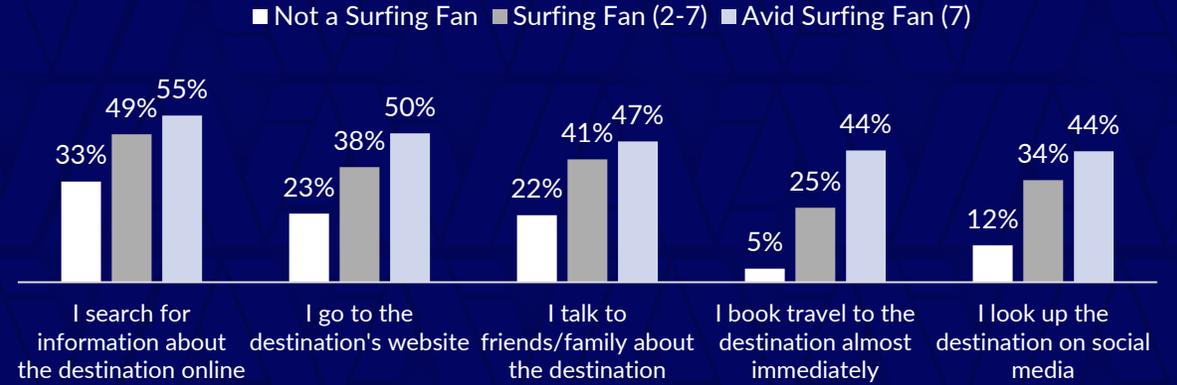
TRAVEL TO ATTEND SPORTS/ENT EVENTS



TRAVEL TO PARTICIPATE IN SPORTS EVENTS



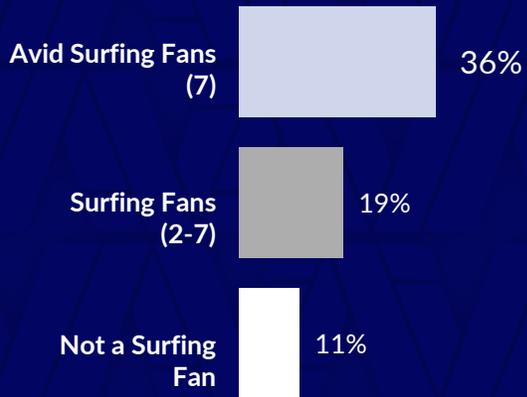
ACTIONS TAKEN AFTER SEEING A TRAVEL DESTINATION ON TV, ONLINE, THROUGH SOCIAL MEDIA ETC



Annual Vacation



ANNUAL VACATION IS 3,000 MILES + DISTANCE



AVE # OF NIGHTS



AVE TOTAL SPEND



AVE PER PERSON PER DAY



DEMOGRAPHICS



% WITH \$100K+ INCOME



% MALE



MAHALO!

