HTA REGULAR BOARD MEETING
Thursday, February 23, 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
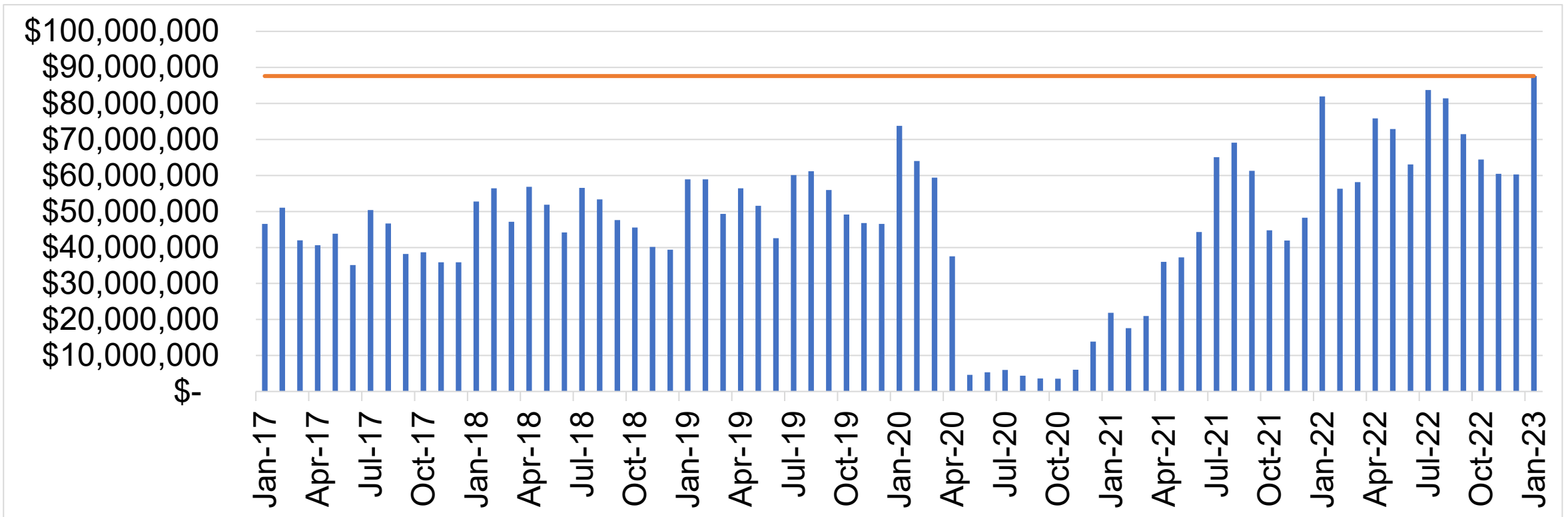
Director of Tourism Research

January 2023 Highlights – TAT Collections

- Preliminary January TAT Collections: $87.6 million

- Preliminary YTD Fiscal 23 TAT Collections: $509.5 million (+23.5%)

- YTD Fiscal 22 TAT Collections: $412.4 million (+$97.1 million)

Source: Department of Taxation

January 2023 Highlights - Hawaiʻi Airport Throughput

Throughput by Week
State: Hawaii; Airport: All
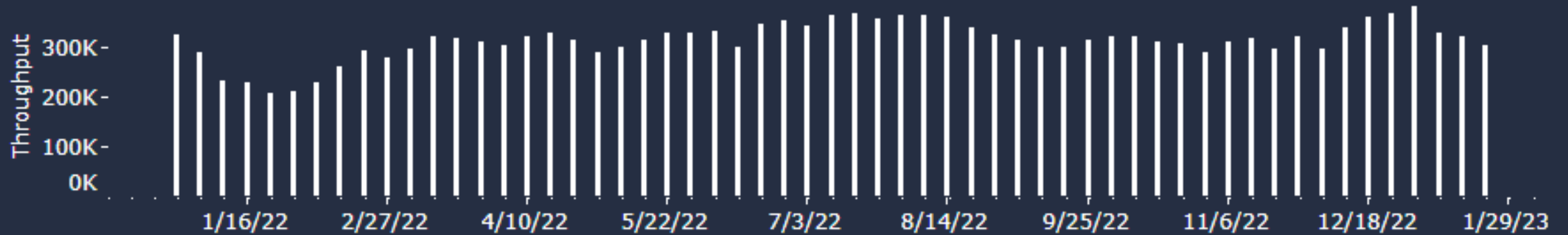
Hawaii Airports
Throughput for the last 6 months, % change compared to 2019

	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Daniel K. Inouye International Airport	-19%	-13%	-12%	-13%	-9%	-6%
Kahului	-3%	6%	4%	2%	0%	6%
Ellison Onizuka Kona International Airport	-7%	6%	4%	-2%	-1%	8%
Lihue	3%	16%	16%	9%	4%	4%
Hilo International	7%	18%	18%	16%	16%	20%

Source: TSA by Tourism Economics

January 2023 Highlights - Lodging

State of Hawai'i Hotel Performance

	2023	2022	2019
Occupancy	73.0%	64.6%	79.5%
ADR	$391	$348	$298
RevPAR	$286	$225	$237

State of Hawai'i Vacation Rental Performance

	2023	2022	2019
Occupancy	62.1%	67.4%	78.2%
ADR	$330	$290	$218

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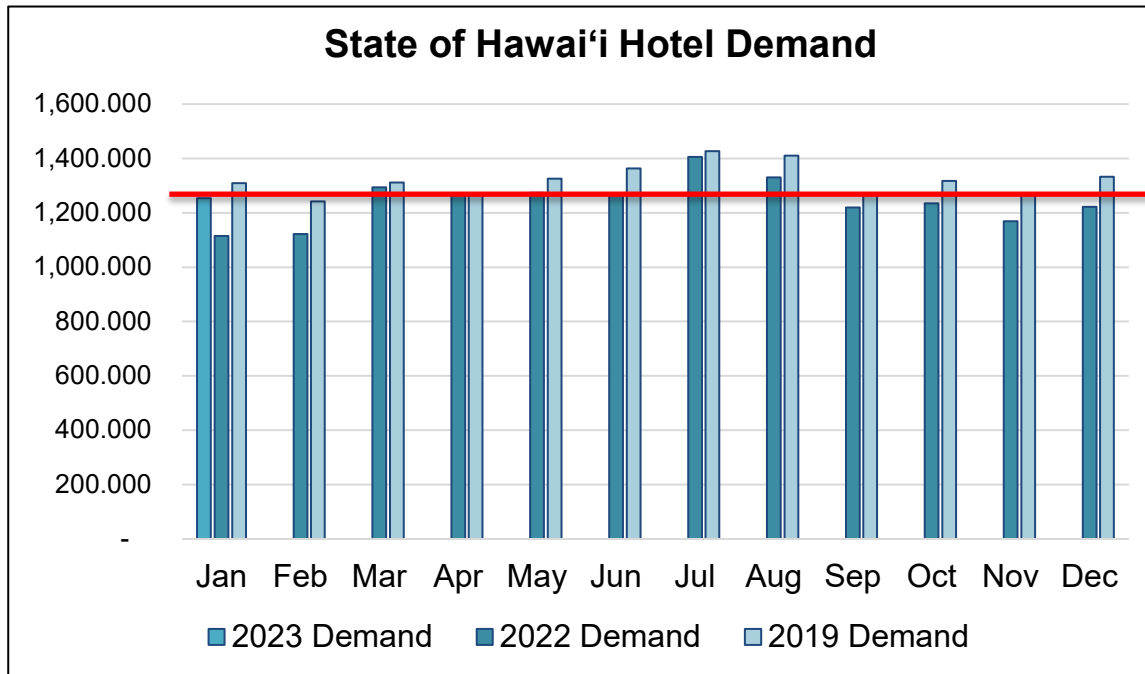
State of Hawai'i Vacation Rental Demand
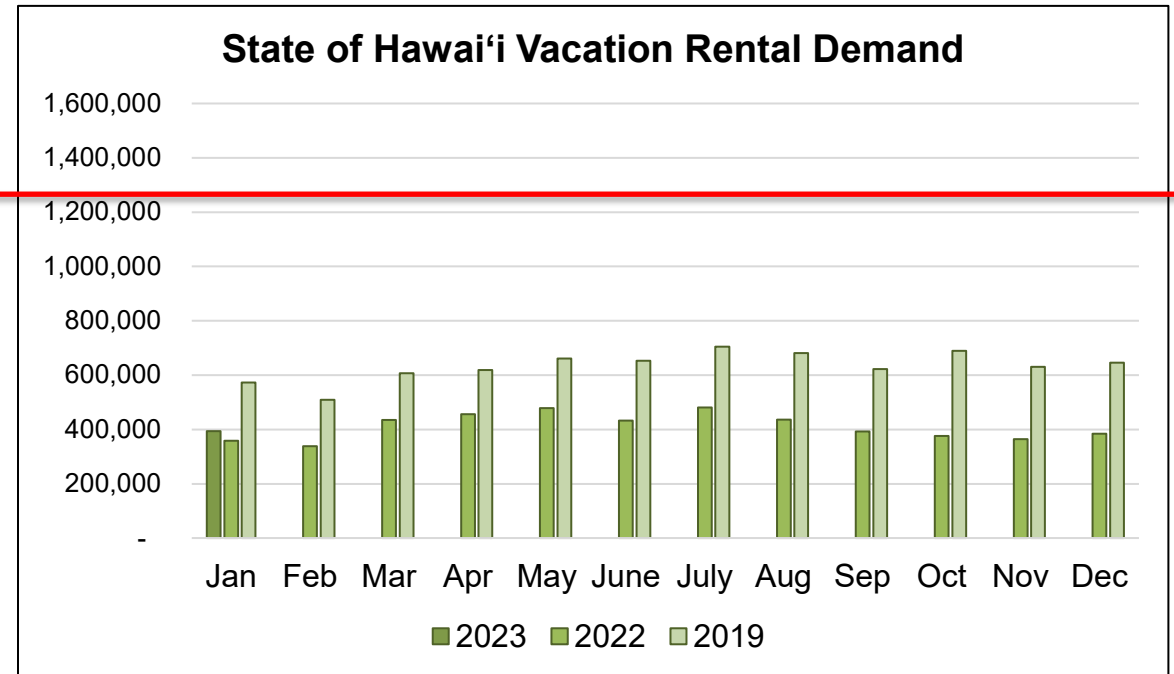
Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority, Transparent Intelligence, Inc. © Copyright 2023 State of Hawai'i Department of Business, Economic Development & Tourism

Scheduled Nonstop Seats to Hawaiʻi by Port Entry

February	Total			Domestic			International		
	2023	**2022**	**2019**	**2023**	**2022**	**2019**	**2023**	**2022**	**2019**
STATE	1,046,526	937,640	1,001,992	849,348	840,581	676,436	197,178	97,059	325,556
HONOLULU	605,330	489,503	615,316	444,890	426,886	342,742	160,440	62,617	272,574
KAHULUI	258,600	262,896	203,181	232,918	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
LIHUʻE	76,960	82,301	76,697	73,480	78,647	69,797	3,480	3,654	6,900

March	Total			Domestic			International		
	2023	**2022**	**2019**	**2023**	**2022**	**2019**	**2023**	**2022**	**2019**
STATE	1,221,435	1,159,954	1,183,596	999,843	1,029,748	834,753	221,592	130,206	348,843
HONOLULU	685,826	590,706	711,281	506,412	509,436	420,930	179,414	81,270	290,351
KAHULUI	312,245	329,044	250,043	282,680	293,411	216,456	29,565	35,633	33,587
KONA	128,243	130,795	124,674	118,936	122,712	106,853	9,307	8,083	17,821
HILO	0	3,899	3,665	0	3,899	3,665	0	0	0
LIHUʻE	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 February 21, 2023, subject to change

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

HAWAIʻI TOURISM
AUTHORITY

Scheduled Nonstop Seats to Hawaiʻi by Port Entry

April	Total			Domestic			International		
	2023	**2022**	**2019**	**2023**	**2022**	**2019**	**2023**	**2022**	**2019**
STATE	1,109,686	1,083,288	1,097,017	903,258	951,005	775,912	206,428	132,283	321,105
HONOLULU	648,617	572,849	668,776	468,482	478,716	393,666	180,135	94,133	275,110
KAHULUI	261,739	291,261	241,065	240,890	263,491	213,772	20,849	27,770	27,293
KONA	109,369	116,149	103,121	105,317	109,771	89,117	4,052	6,378	14,004
HILO	0	2,887	3,873	0	2,887	3,873	0	0	0
LIHUʻE	89,961	100,142	80,182	88,569	96,140	75,484	1,392	4,002	4,698

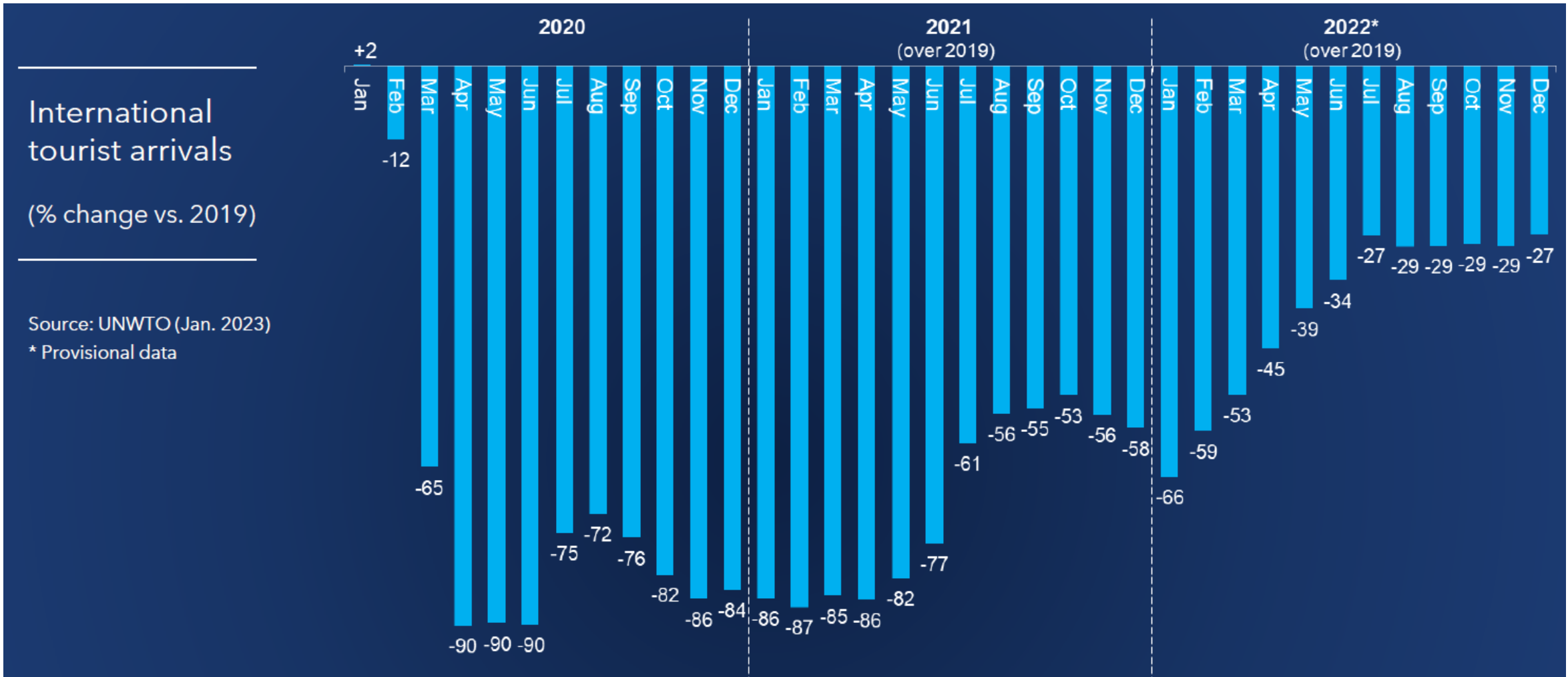Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of February 21, 2023, subject to change

UNWTO: International Tourist Arrivals

International tourist arrivals

(% change vs. 2019)

Source: UNWTO (Jan. 2023)
* Provisional data

Source: UNWTO, January 2023 (provisional data)

February 23, 2023

UNWTO: International Tourist Arrivals

International tourist arrivals:

Percentage of 2019 levels recovered in 2022 (%)*

Percentage not recovered

Percentage recovered

Source: UNWTO (January 2023)
* Provisional data

Middle East	Europe	Americas	Africa	World	Asia Pacific
17%	21%	35%	35%	37%	77%
83%	79%	65%	65%	63%	23%
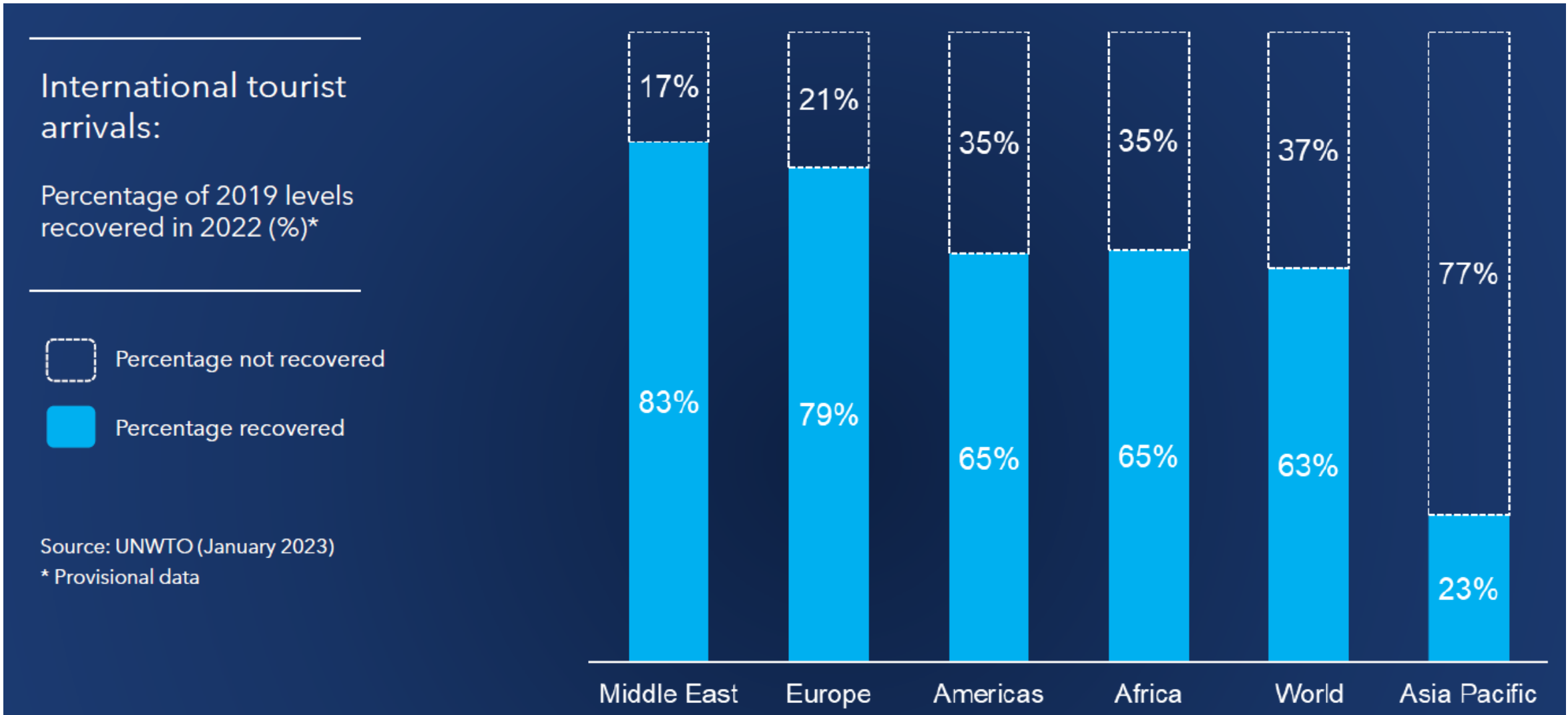
Source: UNWTO, January 2023 (provisional data)

UNWTO: 2023 Outlook

UNWTO Panel of Experts Survey

Percentage of responses : Global

What are your prospects for your destination in 2023?

Source: UNWTO Panel of Experts Survey (January 2023)
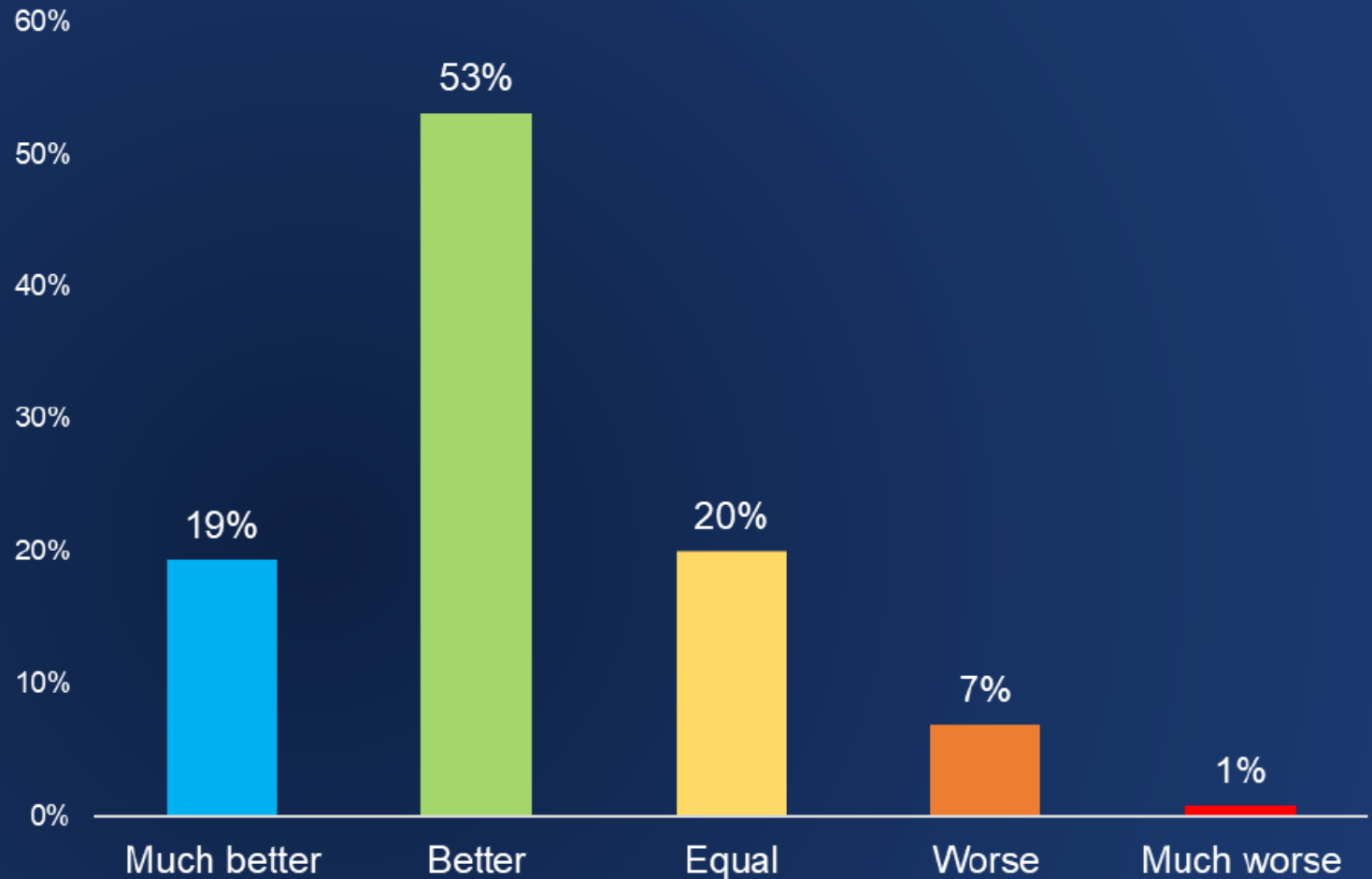
Chart data:
- Much better: 19%
- Better: 53%
- Equal: 20%
- Worse: 7%
- Much worse: 1%

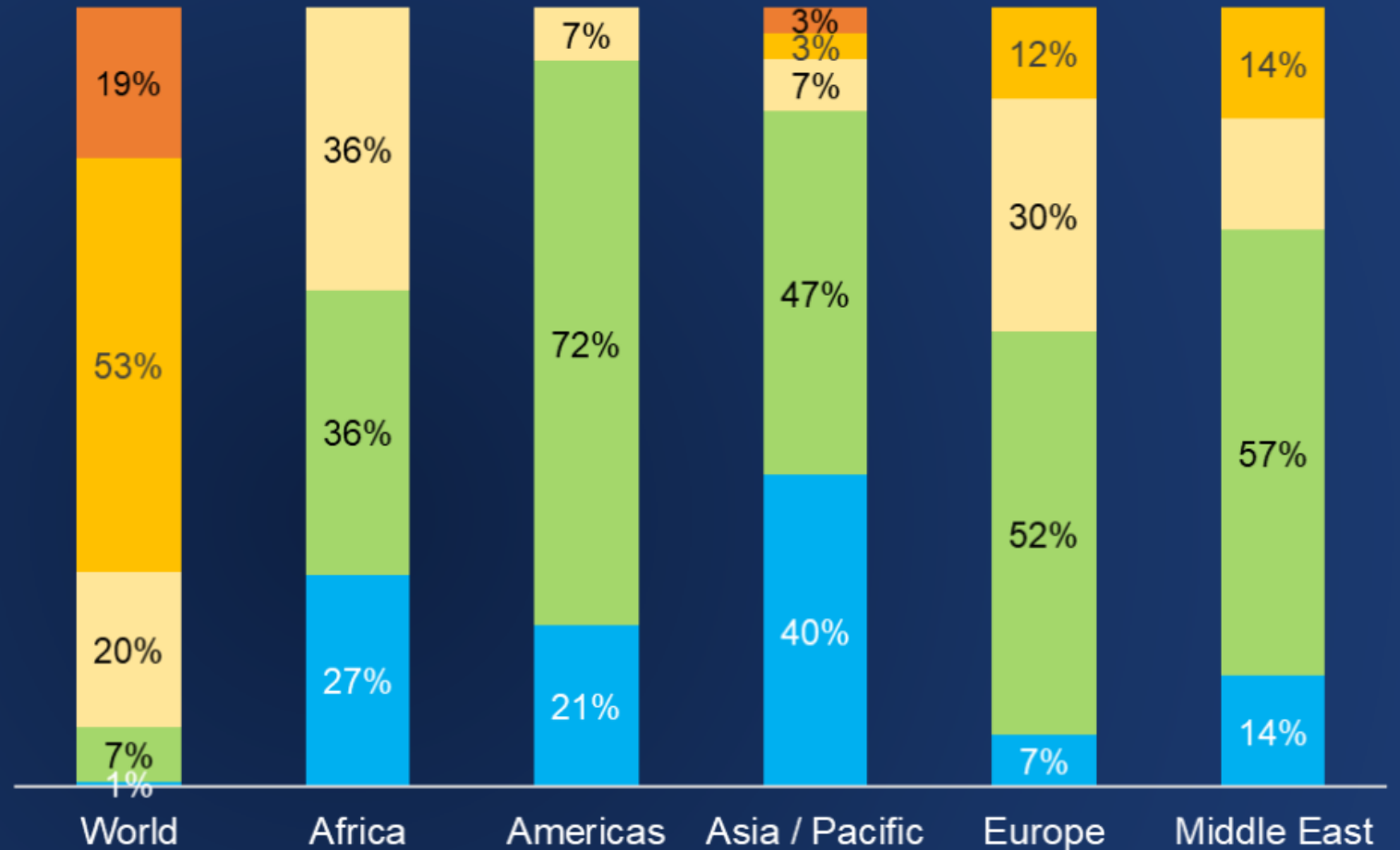Source: UNWTO, January 2023 (provisional data)

UNWTO: 2023 Outlook

UNWTO Panel of Experts Survey

Percentage of responses by world region

What are your prospects for your destination in 2023?

- Much worse
- Worse
- Equal
- Better
- Much better

Source: UNWTO Panel of Experts Survey (January 2023)

Source: UNWTO, January 2023 (provisional data)

UNWTO: 2023 Outlook

UNWTO Panel of Experts Survey

What are the main factors weighing on the recovery of international tourism?

Source: UNWTO Panel of Experts Survey (January 2023)

Percentage of experts mentioning each factor

Factor	Percentage
Economic environment	79%
Higher transport & accommodation costs	54%
Uncertainty from Russian offensive in Ukraine	34%
Travel restrictions	32%
Low consumer confidence	30%
Ongoing pandemic/uneven vaccination	22%
Other	20%
Staff shortages	18%
Airport congestion, flight delays & cancellations	16%
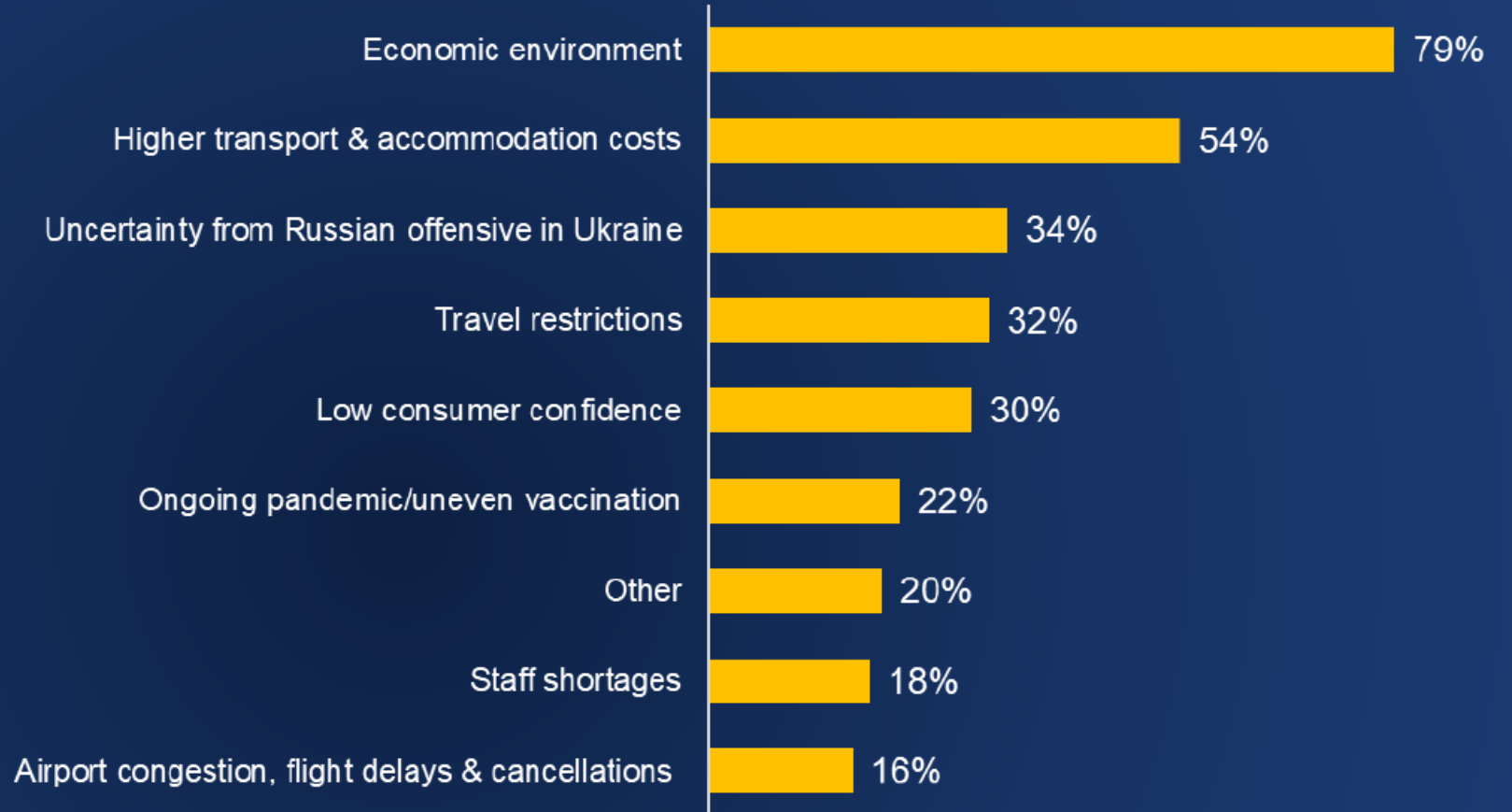
Source: UNWTO, January 2023 (provisional data)

UNWTO: 2023 Outlook

Source: UNWTO, January 2023 (provisional data)

Skift Travel Health Index January 2023 = 89

Global Travel Health Index Score
Weighted Average

Index score (2019 = 100)

Legend: 2020 — 2021 — 2022 — 2023

2019

89

86

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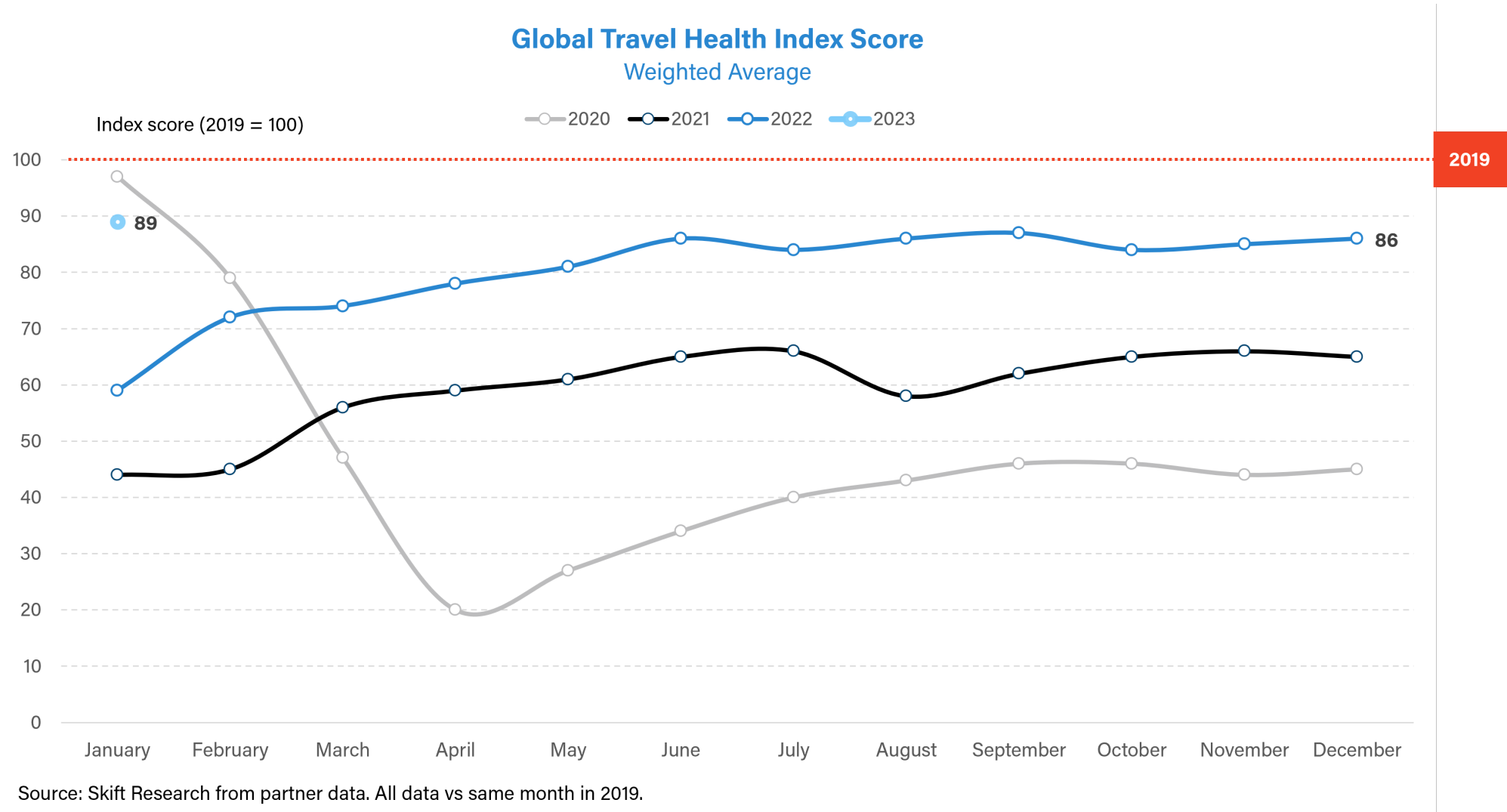
Source: Skift Research

Skift Travel Health Index by Country

Skift Travel Health Index for Selected Countries

Source: Skift Research

February 23, 2023

National Travel and Tourism Office Forecast of International Visitation to the United States (thousands)

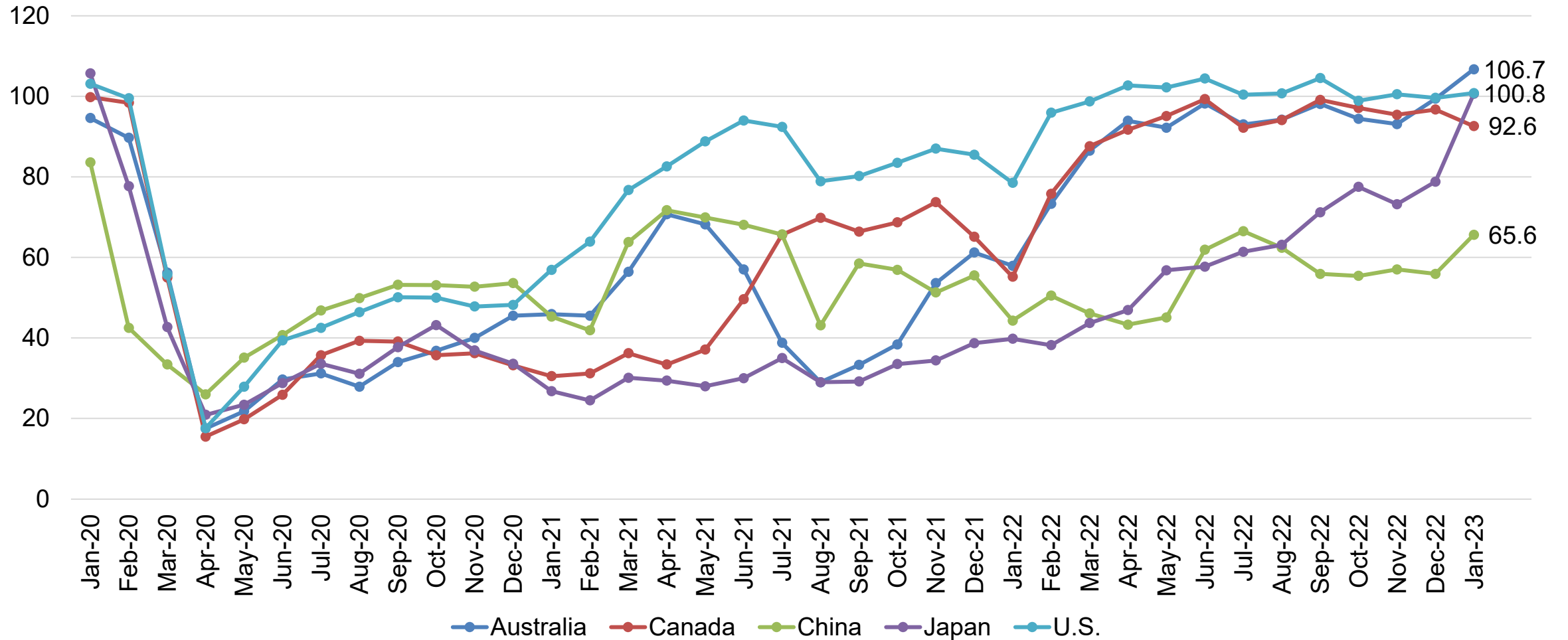| Rank Order 2019	Visitor Origin Country	Actual				Forecast				
		2019	2020	2021	2022	2023	2024	2025	2026	2027
	Total All Countries	79,442	19,212	22,100	51,778	62,753	74,944	82,350	87,021	91,010
1	Canada	20,720	4,809	2,529	14,689	16,783	19,643	22,015	23,310	23,983
2	Mexico	18,328	6,809	10,397	12,970	16,789	19,208	21,032	21,856	22,589
	Overseas	40,393	7,594	9,175	24,120	29,181	36,093	39,303	41,855	44,437
3	U.K.	4,780	730	461	3,466	4,197	4,694	4,923	5,186	5,437
4	Japan	3,753	697	122	597	1,479	2,072	2,346	3,012	3,500
5	China	2,830	378	192	368	849	1,381	2,172	2,519	2,830
6	South Korea	2,298	439	203	920	1,328	1,756	2,068	2,327	2,511
7	Brazil	2,105	424	239	1,225	1,461	1,751	1,957	2,115	2,273
8	Germany	2,064	294	249	1,481	1,775	2,056	2,115	2,255	2,337
9	France	1,844	298	222	1,318	1,556	1,752	1,858	2,001	2,070
10	India	1,474	336	433	1,257	1,426	1,556	1,632	1,731	1,860
11	Australia	1,319	209	52	642	865	1,066	1,257	1,375	1,448
12	Italy	1,086	141	136	718	773	930	1,059	1,110	1,162
13	Colombia	944	270	1,064	944	957	1,004	986	1,020	1,045
14	Spain	943	152	182	773	870	939	986	1,030	1,061
15	Argentina	854	198	302	525	545	596	664	713	750
16	Netherlands	727	111	86	473	707	790	760	805	836
17	Ireland	521	80	49	403	488	530	547	569	594
18	Taiwan	500	91	50	137	328	393	378	435	475

Source: National Travel and Tourism Office, February 2023

National Travel Indicators

December, 2022

U.S. TRAVEL
A S S O C I A T I O N®

Travel Spending (Tourism Economics)	Auto Trips (Arrivalist)	Air Passengers (TSA)	Overseas Arrivals (NTTO)	Hotel Demand (STR)	Short-term Rental Demand (AIRDNA)
↗ +3.1% December vs. 2019	↙ -0.8% December vs. 2019	↙ -6.7% December vs. 2019	↙ -28.8% December vs. 2019	↗ +1.1% December vs. 2019	↗ +33.3% December vs. 2019
↙ -0.6% YTD vs. 2019	YTD N/A	↙ -10.2% YTD vs. 2019	↙ -40.7% YTD vs. 2019	↙ -2.3% YTD vs. 2019	↗ +27.0% YTD vs. 2019

Insights

Auto trips improved to 1% below its 2019 level in December from 6% below in November.

Air passenger volume retreated to 7% below 2019 in December – its worst month since August 2022.

Overseas arrivals recovered to 29% below its 2019 level in December.

Hotel room demand surpassed its 2019 benchmark by 1% in December, although group demand within the top 25 markets slid one percentage point to 8% below its 2019 level.

Short-term rental demand grew 33% beyond its 2019 level in December.

Travel Indicators
% change relative to same month in 2019

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Travel Spending (Tourism Economics)	-12%	-6%	-5%	3%	0%	1%	0%	-3%	6%	3%	1%	3%
Auto Trips (Arrivalist)	-12%	-2%	-13%	6%	-2%	2%	-1%	-15%	6%	3%	-6%	-1%
Air Passengers (TSA)	-22%	-16%	-12%	-9%	-10%	-11%	-12%	-9%	-6%	-5%	-6%	-7%
Overseas Arrivals (NTTO)	-65%	-60%	-52%	-43%	-43%	-41%	-35%	-35%	-34%	-30%	-33%	-29%
Hotel Demand (STR)	-10%	-5%	-3%	0%	-2%	-2%	-3%	-4%	2%	0%	-1%	1%
Top 25 Group Hotel Demand* (STR)	-58%	-42%	-24%	-16%	-14%	-5%	-11%	-10%	-5%	-6%	-7%	-8%
Short-term Rental Demand (AIRDNA)	25%	27%	18%	28%	29%	26%	22%	19%	29%	40%	31%	33%
National Park Visits (National Park Service)	17%	5%	18%	8%	15%	-11%	-8%	-12%	-5%	2%	-4%	0%
Organic Web Sessions (Simpleview & Tempest)*	36%	43%	35%	33%	30%	26%	16%	15%	17%	24%	24%	19%

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

-65% ▬▬▬ 43%

...emand at upper-tier hotels (luxury and upper upscale classes)

SYMPHONY | TOURISM ECONOMICS

Hawaii Travel Indicators

December, 2022

Select a State
Hawaii

Hawaii Travel Impact
December, 2022

Travel Spending	**$2.19B** ⬊ -5.6% vs. 2019
Tax Revenue (local & state)	**$134.4M** ⬊ -5.3% vs. 2019

U. S. Total Travel Impact
December, 2022

|	
Travel Spending	**$96.62B** ⬈ +3.1% vs. 2019
Tax Revenue (local & state)	**$6.6B** ⬈ +0.9% vs. 2019

Hawaii Travel Spending

	Travel Spending	vs. Last Year	vs. 2019	Market Growth Index (US = 100)*
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	$2.27B	⬈ +9.4%	⬊ -1.7%	97
Dec-22	$2.19B	⬊ -2.2%	⬊ -5.6%	92

Travel Spending (% change vs 2019)
Hawaii vs U.S. total

Legend: State % change, US % change
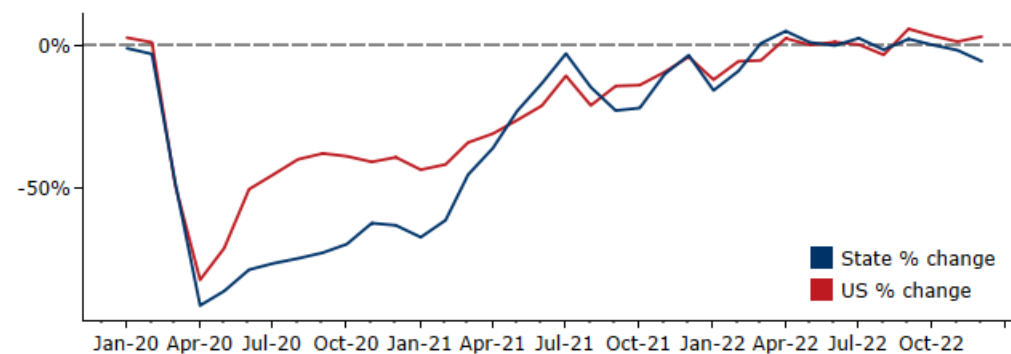
L & H Jobs by State
December, 2022, % change vs. 2019

L & H Jobs

U.S. Total
-4.3%

Scale: -13.2% to 11.0%
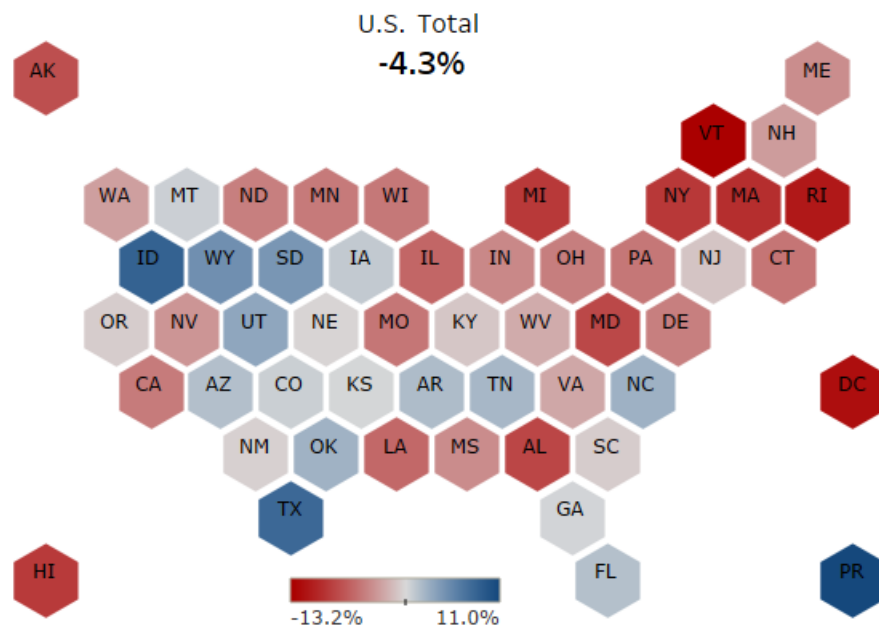
⬊ **-5.6%**
December vs. 2019
Travel Spending
(Tourism Economics)

⬊ **-5.0%**
December vs. 2019
Air Passengers
(Airline Data Inc; TSA)

⬊ **-11.4%**
December vs. 2019
Auto Trips
(Arrivalist)

⬊ **-11.7%**
December vs. 2019
Hotel Demand
(STR)

⬊ **-9.0%**
December vs. 2019
L & H Jobs
(BLS)

Economics (Travel Spending)
...ndex indicates whether a state is performing better or worse than the national average relative to its pre-pandemic benchmark.

SYMPHONY TOURISM ECONOMICS

Air Travel
December, 2022

December, 2022 Passenger Throughput by State
All passengers (domestic + international), % change vs. 2019

65.6M
December, 2022 U.S. Passenger Throughput
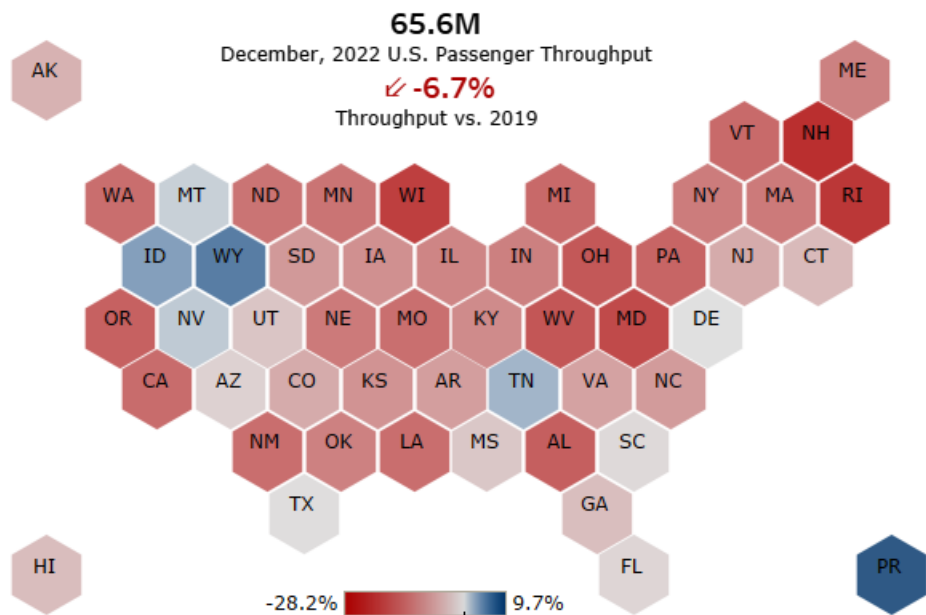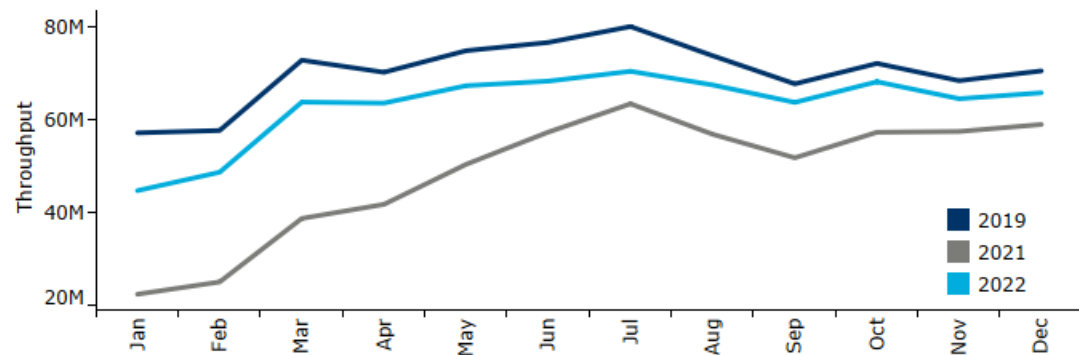
-6.7%
Throughput vs. 2019

-28.2% — 9.7%

U.S. Monthly Passenger Throughput
All passengers (domestic + international)

Legend: 2019, 2021, 2022

Passenger Throughput Trend Comparison
All passengers (domestic + international), Index (2019=100)

State/Territory Name
Multiple values

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

61 — 115

U.S. TRAVEL ASSOCIATION

U.S. Hotel Leisure Transient Occupancy Pace
2022 leisure hotel booking pace vs same time 2020 (pre-pandemic), 7-day running average by stay date

Stay date	Value
01/22/23	7.9%
01/29/23	2.9%
02/05/23	-0.1%
02/12/23	-2.4%
02/19/23	3.7%
02/26/23	8.1%
03/05/23	8.4%
03/12/23	4.8%
03/19/23	2.2%
03/26/23	5.5%
04/02/23	4.3%
04/09/23	5.6%
04/16/23	0.7%
04/23/23	0.5%
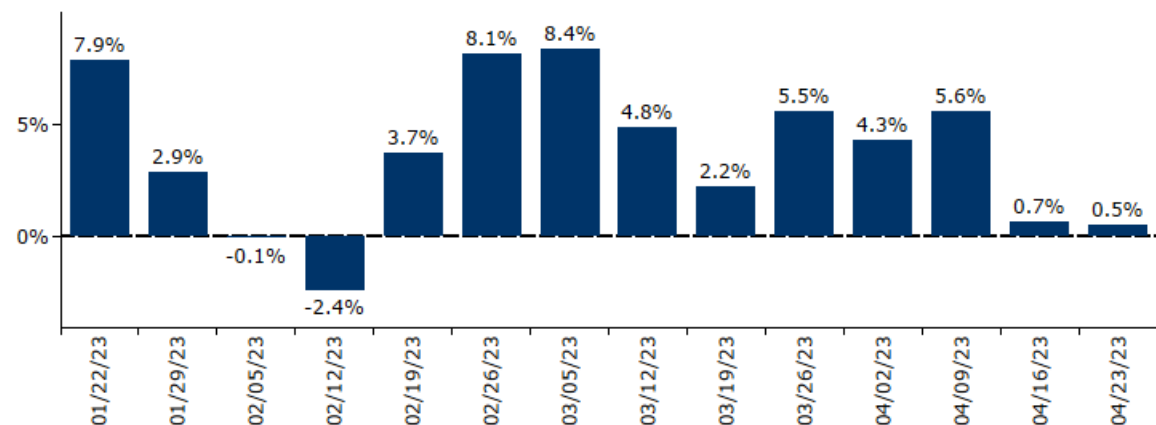
Source: TravelClick, an Amadeus Company

Planning Leisure Travel Within the Next 6 Months
% of American Consumers

Demographic Generation

Travel Plans (use slider below to change travel window)
Within the Next 6 Months

Legend: 2022 Q1, 2022 Q2, 2022 Q3, 2022 Q4

- GenZ — 46%
- Millennial — 65%
- GenX — 59%
- Boomer — 57%
- Silent/GI — 50%
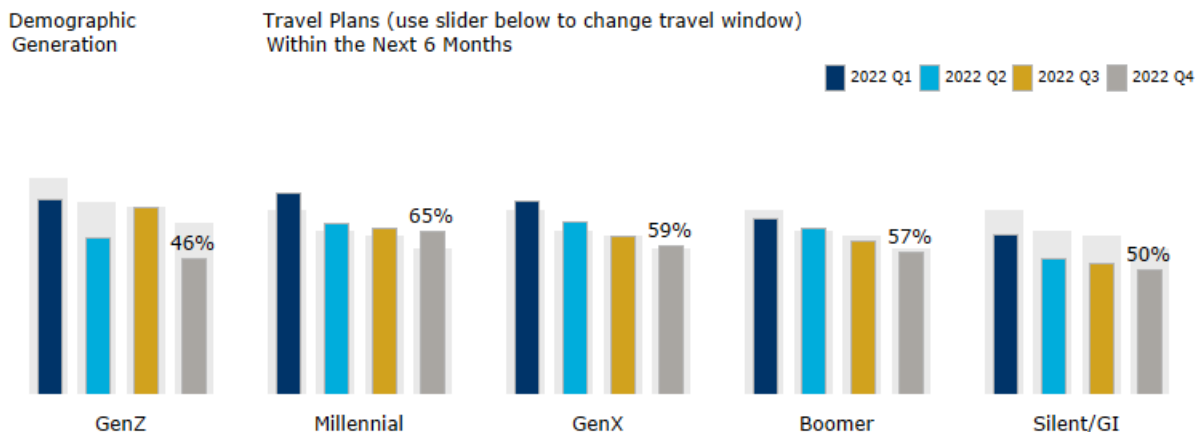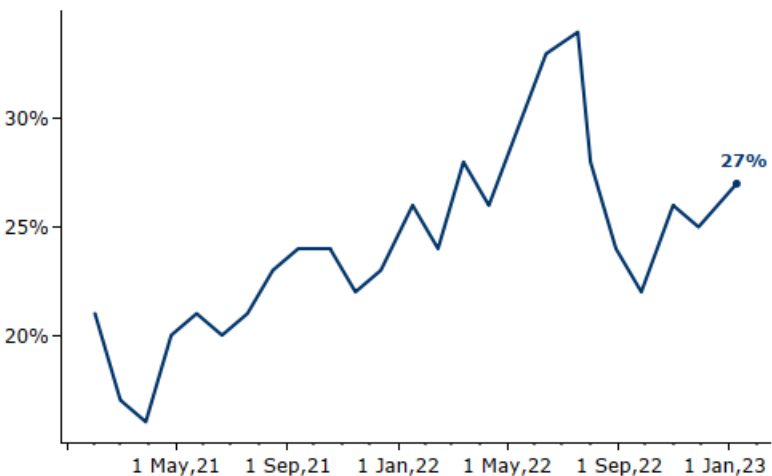
Source: MMGY Global's Portrait of American Travelers (released Q4 2022)
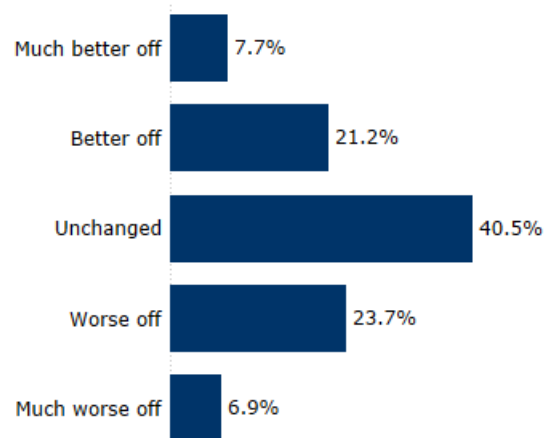
Consumer Travel Sentiment
Transportation Cost Will Greatly Impact my Decision to Travel the Next ..

27% (as of 1 Jan, 23)

Source: Longwoods International

Consumer Travel Priorities
Are you worse or better off or worse off financially than you were a ye..

Much better off	7.7%
Better off	21.2%
Unchanged	40.5%
Worse off	23.7%
Much worse off	6.9%

Source: Destination Analysts (As of December 2022)

Consumer Travel Priorities
Will spending on leisure travel be a priority the next 3-months?

Extremely high priority	11.6%
High priority	18.1%
Somewhat high priority	23.6%
Neutral	21.3%
Low priority	8.2%
Somewhat low priority	8.7%
Extremely low priority	8.5%

Source: Destination Analysts (As of December 2022)

SYMPHONY TOURISM ECONOMICS
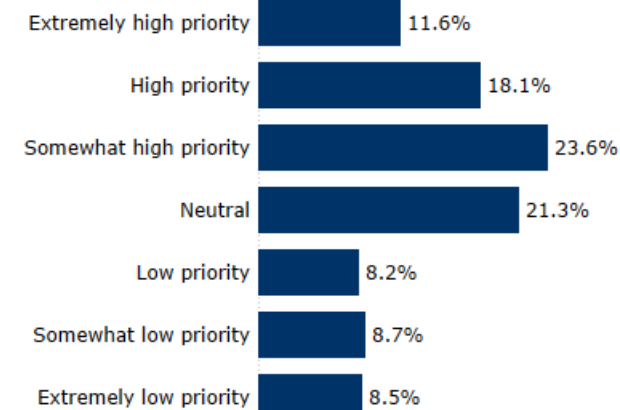
Domestic Business Travel
December, 2022

U.S. TRAVEL ASSOCIATION®

U.S. Hotel Corporate Transient Occupancy Pace
Corporate booking pace vs same time in 2020 (pre-pandemic), 7-day running avg by stay date

Stay date	Value
01/22/23	-6.1%
01/29/23	-10.2%
02/05/23	-10.9%
02/12/23	-12.4%
02/19/23	-10.6%
02/26/23	-6.8%
03/05/23	-5.2%
03/12/23	-4.7%
03/19/23	-6.2%
03/26/23	-4.2%
04/02/23	-2.8%
04/09/23	-2.8%
04/16/23	-7.1%
04/23/23	-5.6%
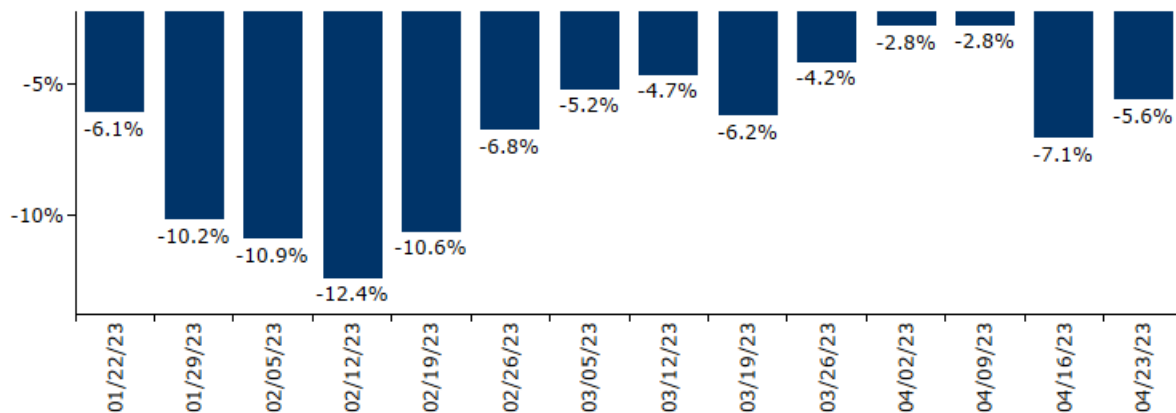
Source: TravelClick, an Amadeus Company

Business Travel Spending by Purpose of Trip
Corporate executives expecting to spend less over the next 6-months, released January 2023

Conferences, conventions, or trade shows
- 2022 Q2: 84%
- 2022 Q3: 60%
- 2022 Q4: 64%

Customer, supplier, or other stakeholder meetings
- 2022 Q2: 78%
- 2022 Q3: 64%
- 2022 Q4: 67%

Internal meetings
- 2022 Q2: 88%
- 2022 Q3: 66%
- 2022 Q4: 72%

Legend: ■ 2022 Q2 ■ 2022 Q3 ■ 2022 Q4
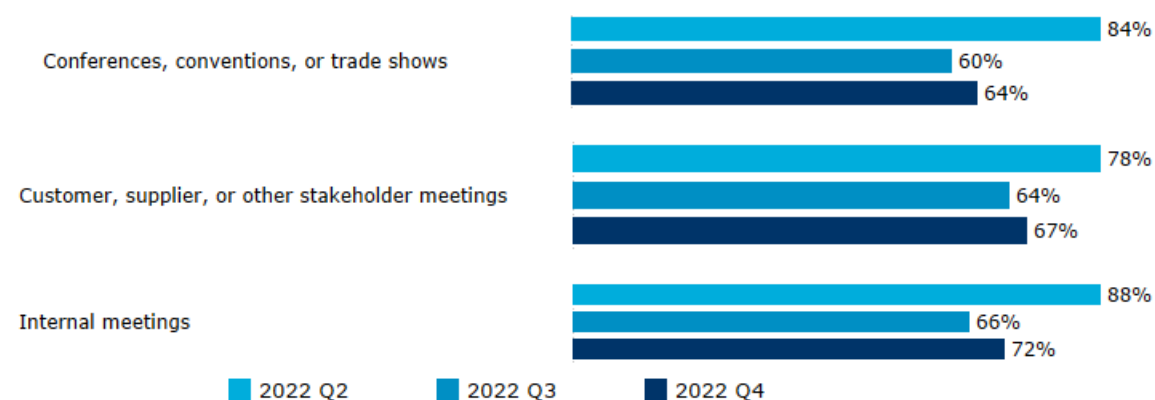
Source: Tourism Economics; U.S. Travel Association; and J.D. Power

Business Travel Plans Next Six Months
% share of respondents expecting to take at least one trip, released January 2023

Internal meetings
- Pre-Pandemic: 88%
- 2022 Q2: 85%
- 2022 Q3: 80%
- 2022 Q4: 85%

Conferences, conventions, or trade shows
- Pre-Pandemic: 84%
- 2022 Q2: 81%
- 2022 Q3: 78%
- 2022 Q4: 80%

Customer, supplier, or other stakeholder meetings
- Pre-Pandemic: 78%
- 2022 Q2: 80%
- 2022 Q3: 75%
- 2022 Q4: 78%

Legend: ■ Pre-Pandemic ■ 2022 Q2 ■ 2022 Q3 ■ 2022 Q4
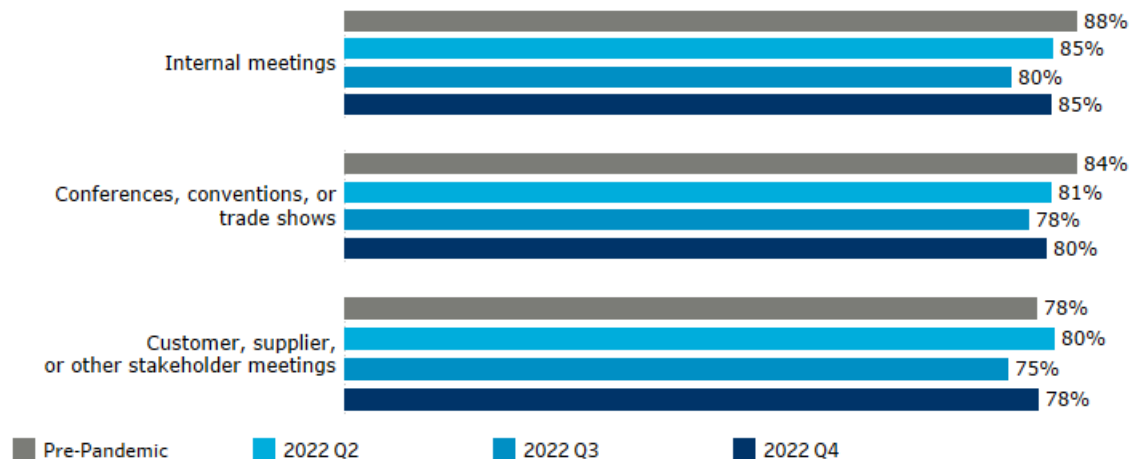
Source: Tourism Economics; U.S. Travel Association; and J.D. Power

Corporate Executive's Views on Business Travel
Share of corporate executives that agree, released January 2023

	2022 Q2	2022 Q3	2022 Q4
Business travel is essential to company operations	73%	77%	81%
The amount of business travel has been limited due to customers/suppliers/stakeholders working remotely	69%	64%	69%
Virtual meetings have replaced much of our organization's business travel and will continue to do so for at least the next six months	75%	71%	67%
Over the long-term, having more remote employees in our organization will increase business travel spending for internal meetings	58%	66%	64%
Internal cost controls over the next six months will likely constrain employee business travel	69%	63%	59%
Risk mitigation efforts are currently restricting employee business travel		59%	46%

Source: Tourism Economics; U.S. Travel Association; and J.D. Power

SYMPHONY | TOURISM ECONOMICS

Insights

DMO/CVB group room nights contracted fell 19% below its 2019 level in December after posting 35% growth in November.
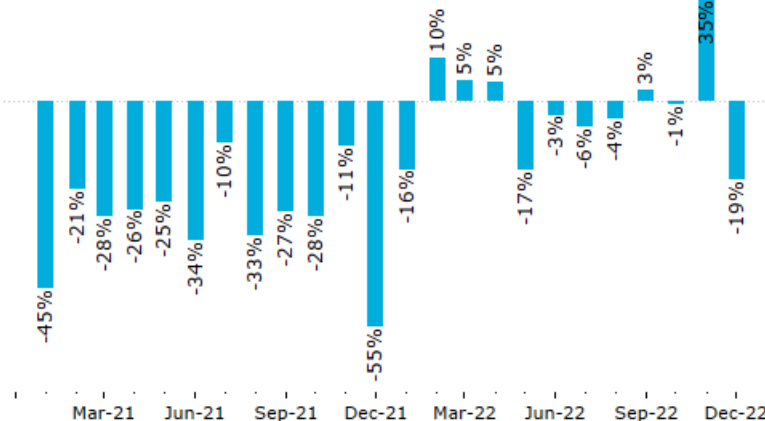
DMO/CVB pace for room nights on the books gained ground on its 2019 benchmark for the second half of 2023, with 2023 Q3 and 2023 Q4 improving by two and one percentage points, respectively, in comparison to the prior month.

Optimism among meeting planners returned in the December survey, with the share responding that they are less optimistic about the outlook for recovery falling to 13% from 61% in October.

Similarly, the share of meeting planners that expect to plan more in-person meetings/events in 2023 compared to 2022 rose to 67% from 59% in October.
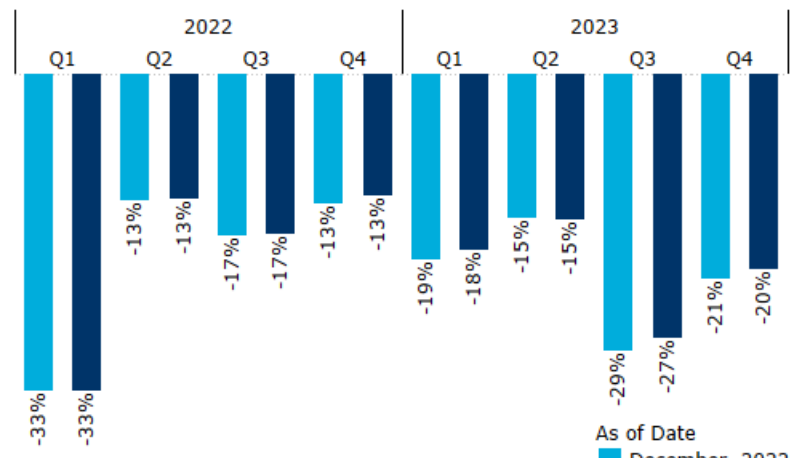
DMO/CVB Group Bookings
Hotel room nights contracted during most recent months % change from 2019

Source: Simpleview CRM (250+ U.S. DMOs)

DMO/CVB Room Nights on the Books
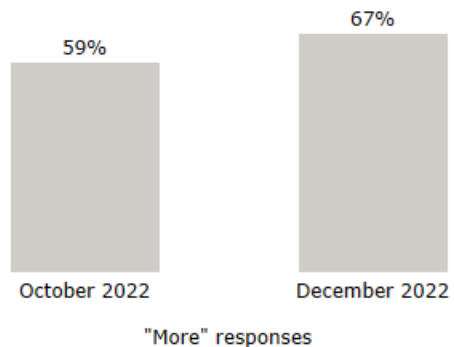Pace for future dates, relative to the same period in 2019

As of Date
December, 2022
January, 2023

Source: Simpleview CRM (250+ U.S. DMOs)
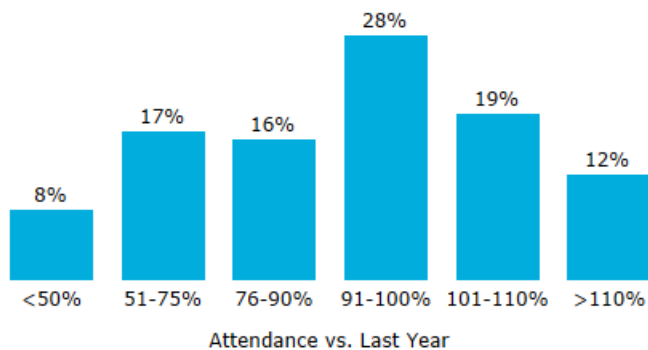
Event Planner
% Of meeting planners who expect to plan more in-person meetings in 2023 than in 2022

"More" responses

Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of December 2022

Event Attendees
How many in-person attendees do you expect in 2023 for your average meetings vs your 2022 results?

Attendance vs. Last Year

Meeting Planner Outlook
How the outlook for recovery has changed among meeting planners the past six weeks

	Less Optimistic	No Change	More Optimistic
Jan-22	49%	30%	21%
Mar-22	7%	18%	75%
Jun-22	20%	32%	48%
Aug-22	14%	24%	62%
Oct-22	61%	16%	23%
Dec-22	13%	28%	59%
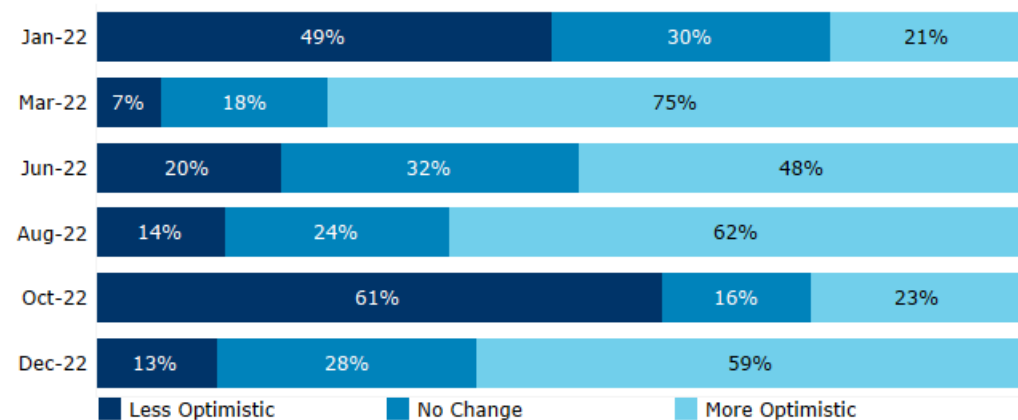
Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey)

Domestic Travel Forecast
Forecasted in November, 2022

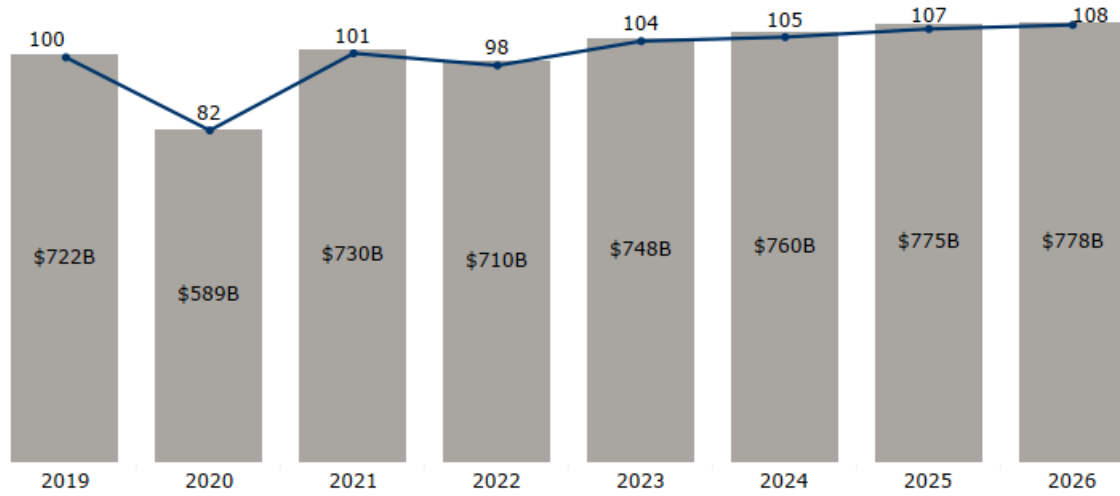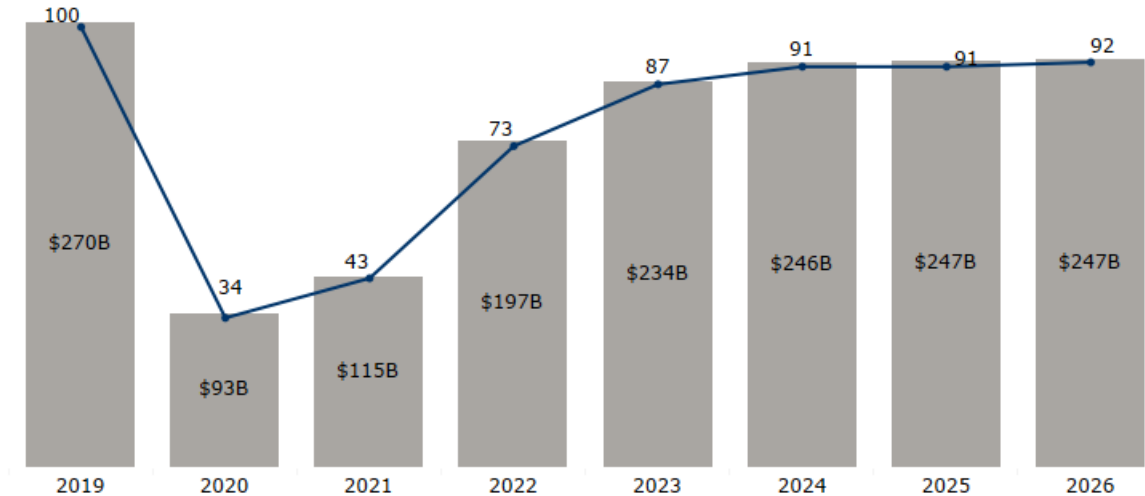## Real Domestic Leisure Travel Spending
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	2019	2020	2021	2022	2023	2024	2025	2026
Index	100	82	101	98	104	105	107	108
Spending	$722B	$589B	$730B	$710B	$748B	$760B	$775B	$778B

Real Domestic Business Travel Spending
Forecasted recovery, relative to 2019 (index, 2019=100)

Year	2019	2020	2021	2022	2023	2024	2025	2026
Index	100	34	43	73	87	91	91	92
Spending	$270B	$93B	$115B	$197B	$234B	$246B	$247B	$247B

Leisure vs. Business Travel Volume
Forecasted recovery, relative to 2019 (index, 2019=100)

Domestic Leisure: 100, 76, 96, 101, 103, 106, 108, 110
Domestic Business: 100, 39, 54, 80, 90, 100, 102, 103
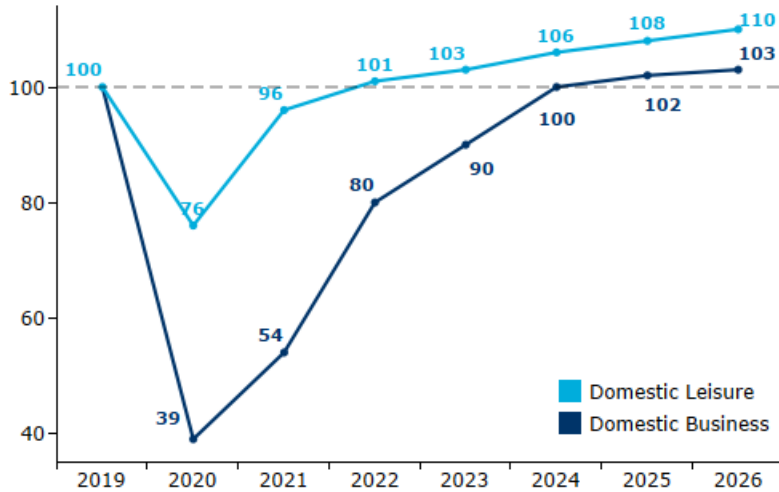
Auto vs. Air Travel Volume
Forecasted recovery, relative to 2019 (index, 2019=100)

Domestic Auto: 100, 71, 89, 98, 100, 105, 107, 108
Domestic Air: 100, 42, 70, 93, 98, 107, 111, 112
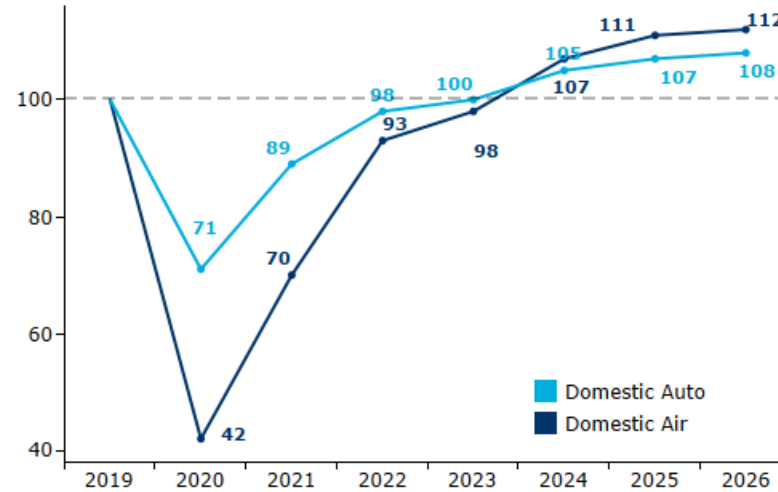
Transient vs. Group Business Travel Spending
Forecasted recovery, relative to 2019 (index, 2019=100)

Domestic Business Transient (real): 100, 40, 51, 78, 89, 93, 93, 93
Domestic Business Group (real): 100, 26, 31, 67, 84, 89, 89, 89
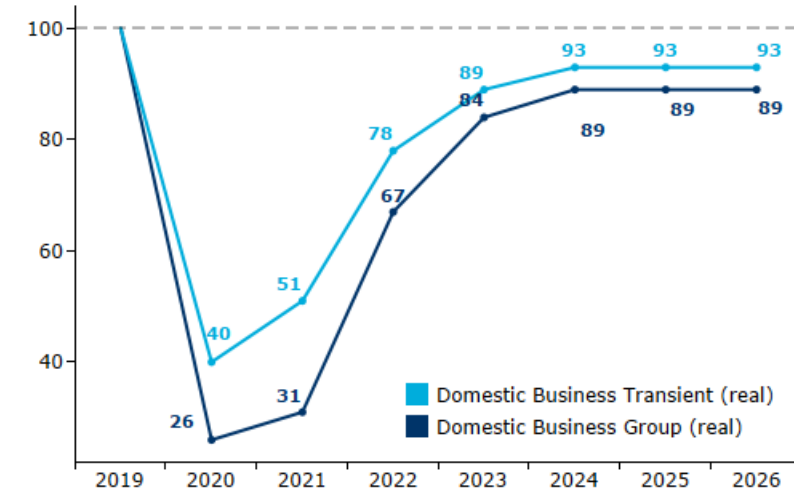
International Inbound Travel
December, 2022

Overseas Arrivals to U.S. by State (+PR)
Visitor arrivals for December, 2022, Index (2019 = 100)

37 ▢ 109

Overseas Arrivals to U.S. Total & Washington
Visitor arrivals to U.S. Total & Washington, (Index 2019 = 100)

State   Washington

- Washington
- U.S. Total

Visa Interview Wait Times, Average Days
As of January 19, 2023

As of Date
January 19, 2023

Venezuela (closed)	China	Ecuador	Israel	Argentina	Brazil	Dominican Republic	Mexico	India	Colombia
	29	177	206	221	451	460	517	577	845

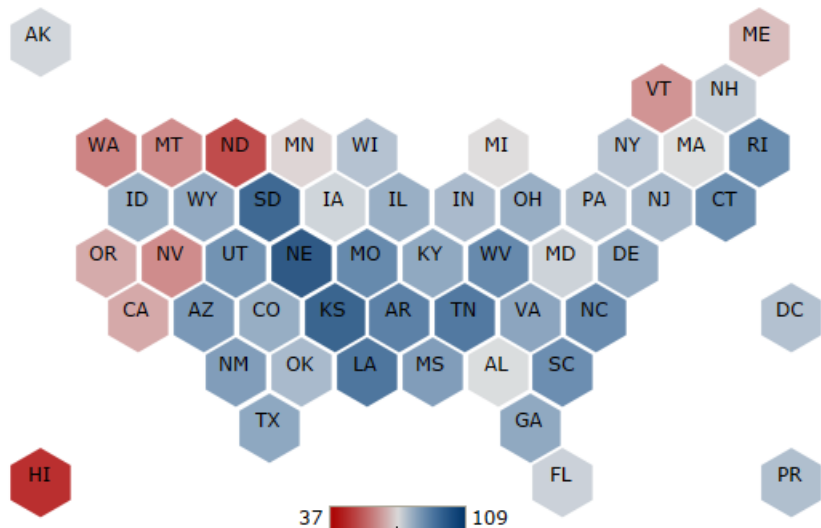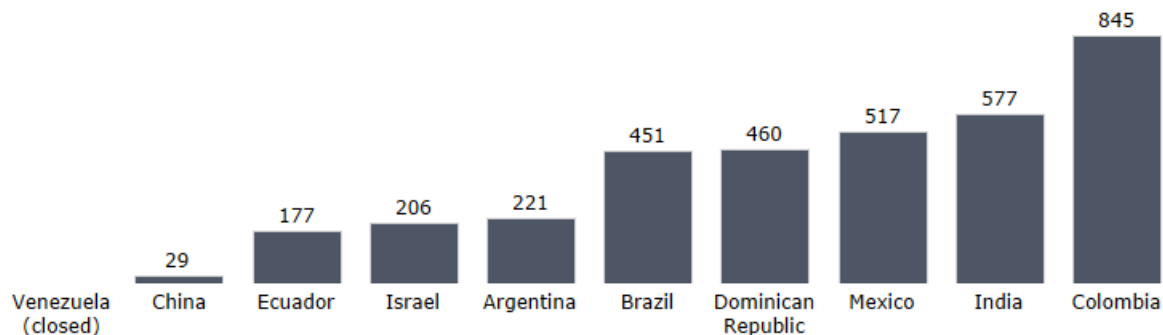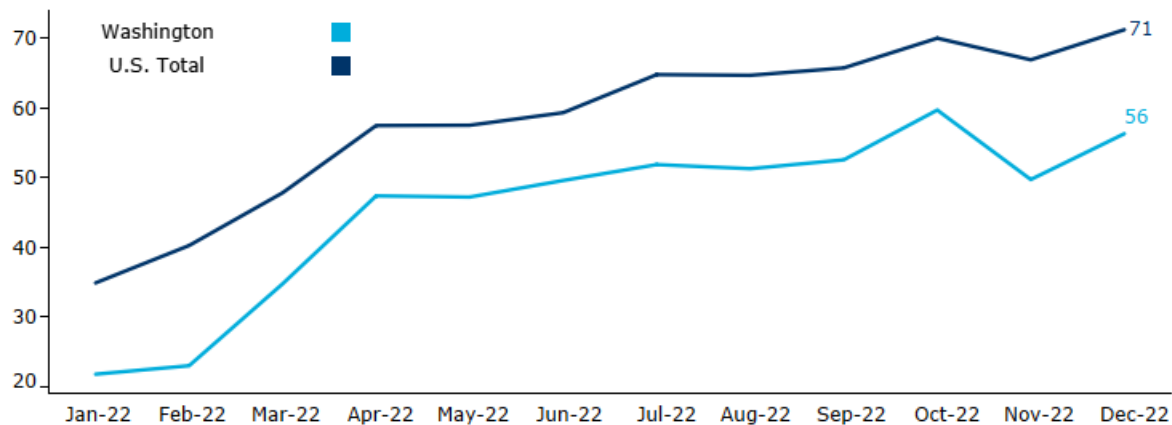Top 10 inbound markets for tourist visa required countries. Weighted average by 2019 consulate visa issuance.
Source: USTA

International Arrivals to U.S. Total
Visitor arrivals to U.S. Total, (Index 2019 = 100)

Destination U.S. Total
Origin Multiple values

|	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Total Overseas	35	40	48	57	57	59	65	65	66	70	67	71
Brazil	31	45	46	57	58	58	65	65	69	73	68	69
Canada	30	32	47	67	74	66	71	74	83	97	98	
Canada (air)	32	34	53	68	79	74	81	99	109	115	115	
France	45	52	56	69	73	74	78	74	73	81	81	86
Germany	40	44	55	67	70	77	81	89	76	79	76	79
India	59	71	72	83	74	82	90	114	98	92	85	100
Mexico	71	68	67	64	70	75	71	79	78	71		
Mexico (air)	91	100	94	85	88	86	82	100	102	99	94	92
UK	38	49	65	68	74	70	79	80	77	82	80	86
China	6	4	9	8	8	10	11	20	16	19	24	27
Colombia	93	101	102	104	99	105	112	101	103	100	88	92
Dominican Republic	87	95	98	101	92	78	81	93	83	83	81	94

4 ▢ 115

...nless otherwise noted)

International Visitor Forecast
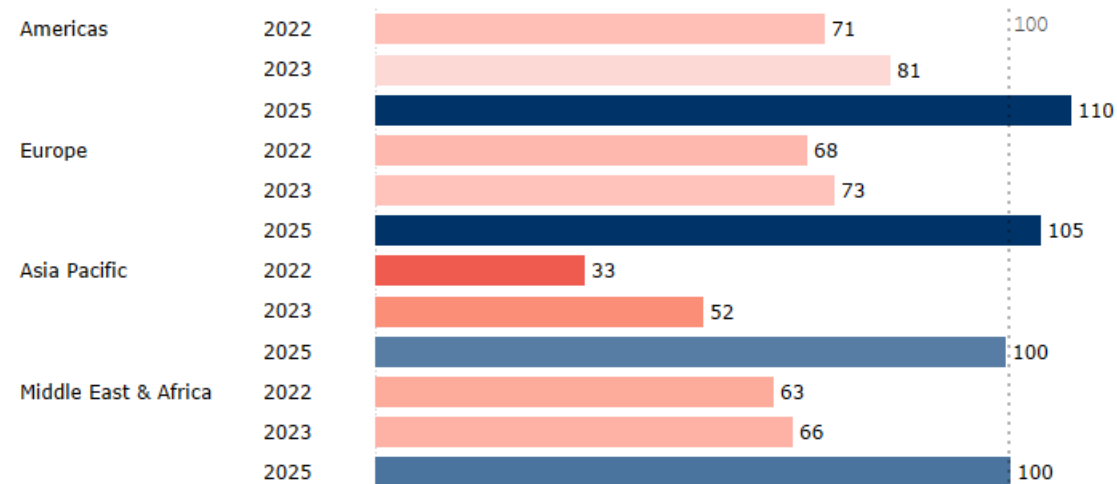
Forecasted in December, 2022

Total International Visits to the U.S.

Forecasted recovery, relative to 2019 (index, 2019=100)

Indicator
Visits
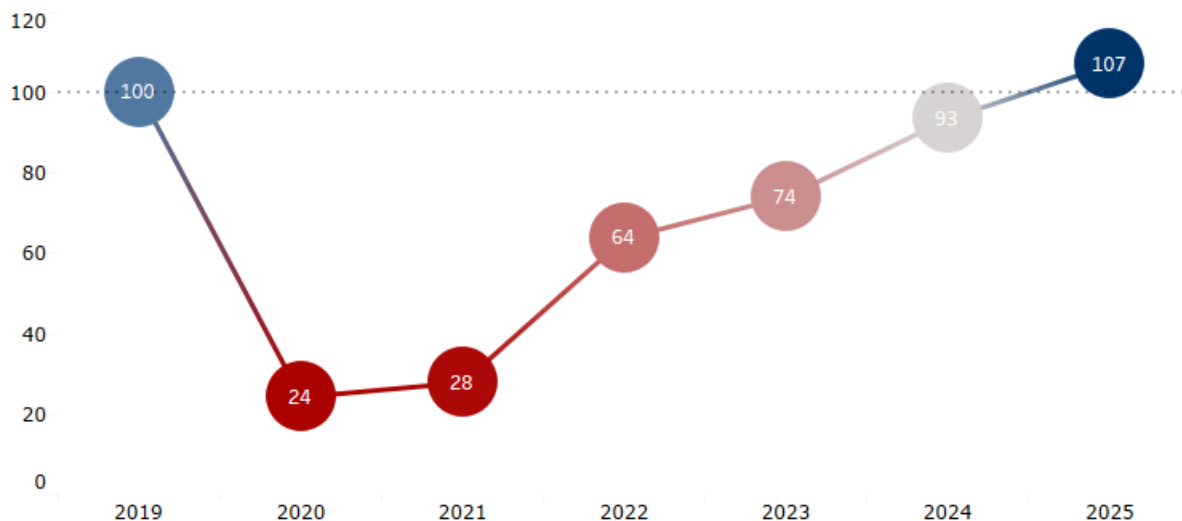
International Visits to the U.S. by World Region

Forecasted recovery for top-regions, relative to 2019 (index, 2019=100)

Region	Year	Value
Americas	2022	71
	2023	81
	2025	110
Europe	2022	68
	2023	73
	2025	105
Asia Pacific	2022	33
	2023	52
	2025	100
Middle East & Africa	2022	63
	2023	66
	2025	100

Exchange Rates

Forecasted exchange rate by year, US$ per Euro

Currency
US$ per Euro

Year	Rate
2019	1.12
2020	1.14
2021	1.18
2022	1.07
2023	1.06
2024	1.09
2025	1.12
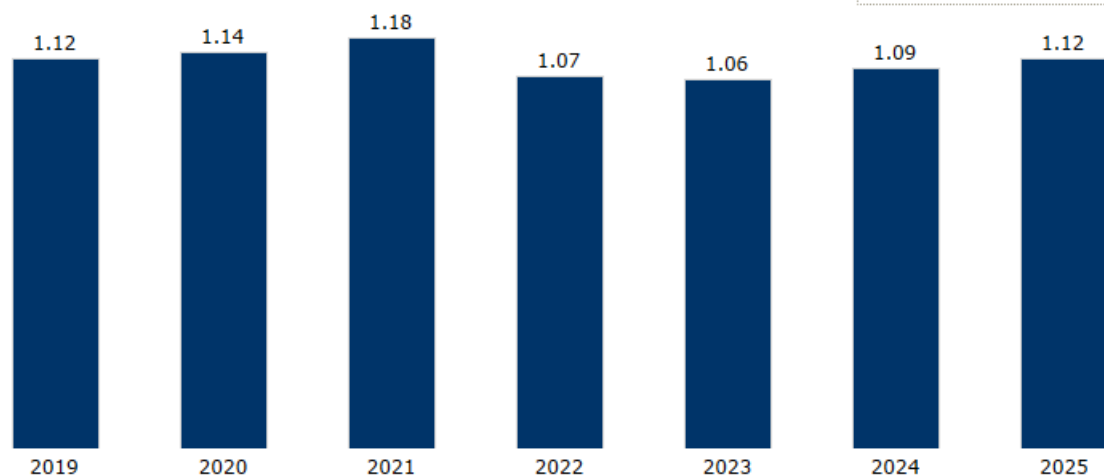
International Visits to the U.S.

Forecasted recovery for top-10 origin markets, relative to 2019 (index, 2019=100)

	2020	2021	2022	2023	2024	2025
Canada	23	12	67	84	104	118
Mexico	37	57	74	83	99	107
United Kingdom	15	10	72	83	103	119
China	13	7	13	33	74	95
Japan	19	3	15	39	77	103
Brazil	20	11	58	65	80	89
Germany	14	12	72	73	92	107
Australia	16	4	48	75	89	102
France	16	12	71	72	91	103
South Korea	19	9	39	53	73	93

SYMPHONY | TOURISM ECONOMICS

ARC/FORWARDKEYS DESTINATION GATEWAY TRENDS

Six Month Outlook: All Origins

	Feb 23	Mar 23	Apr 23	May 23	Jun 23
Current Period	306,085	188,064	119,443	107,427	86,757
Pre-Pandemic	402,497	239,062	161,149	150,716	118,997
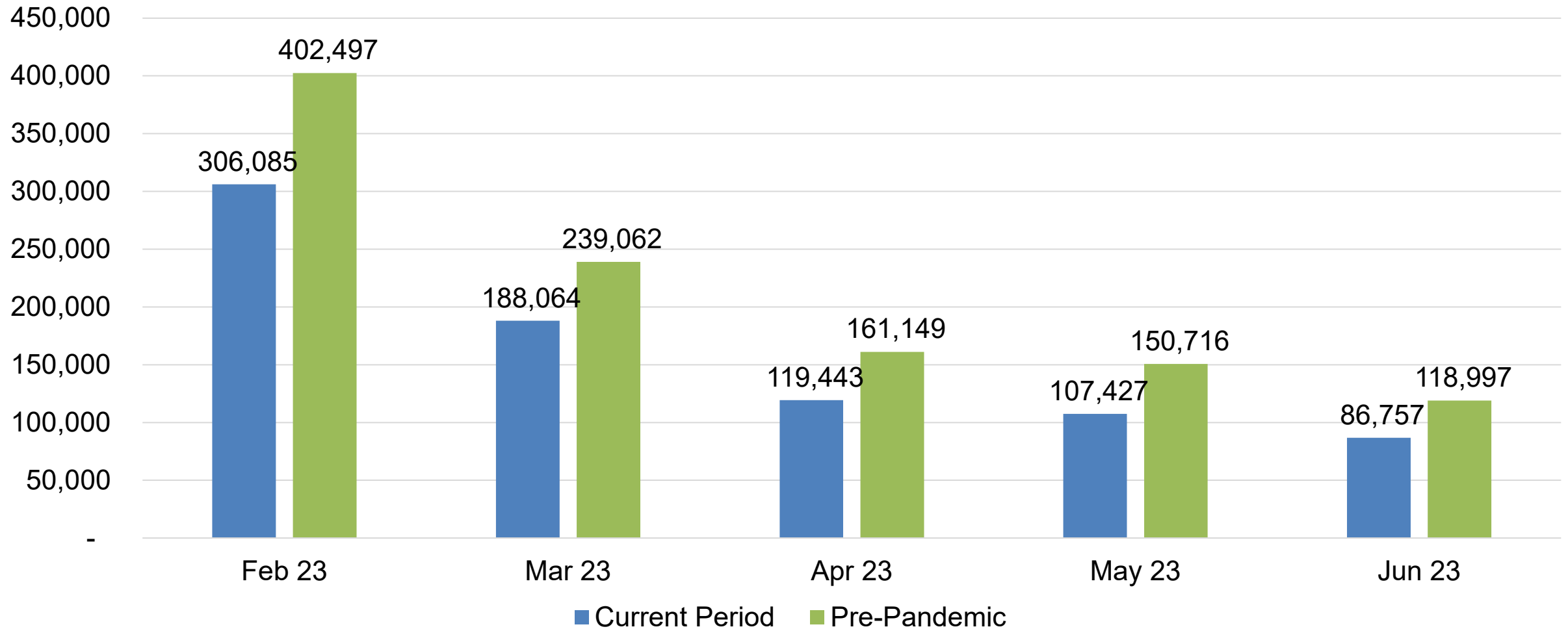
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: United States
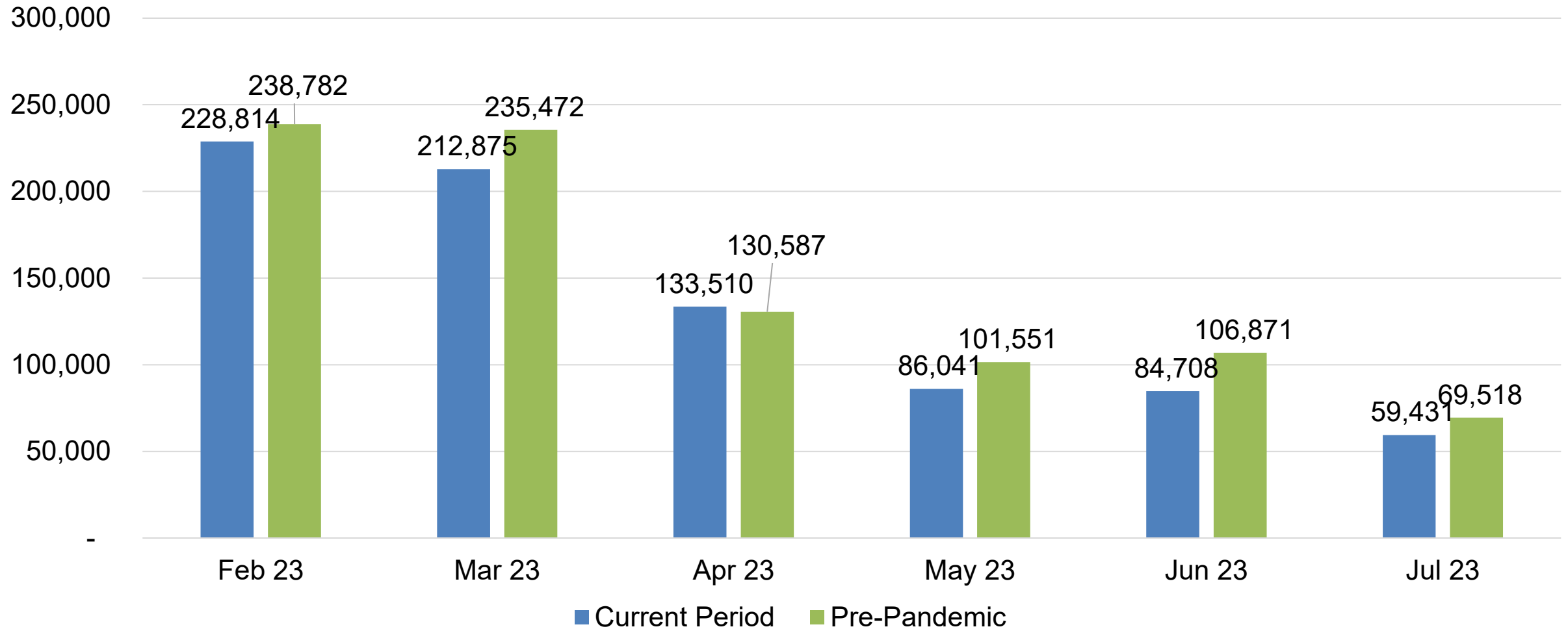
Source: ARC/ForwardKeys Destination Gateway

Trip Origins: United States
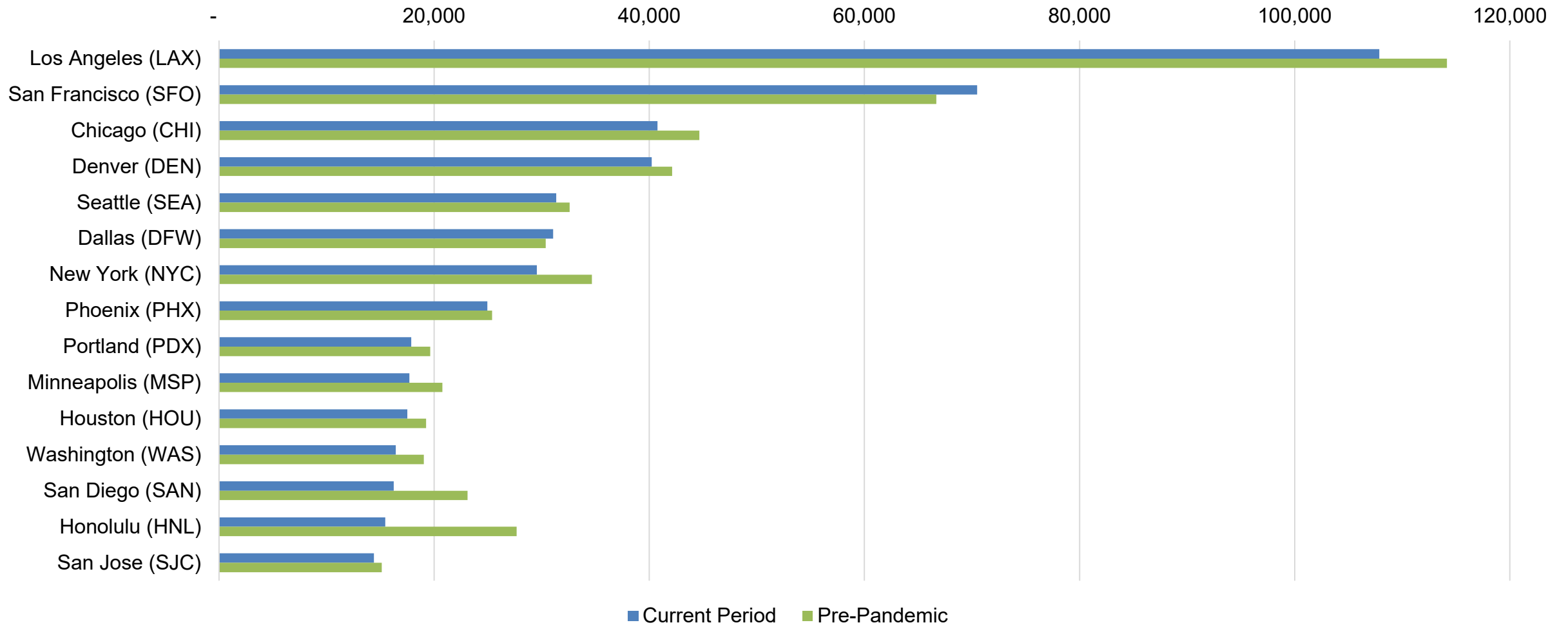
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: United States

Distribution Channel
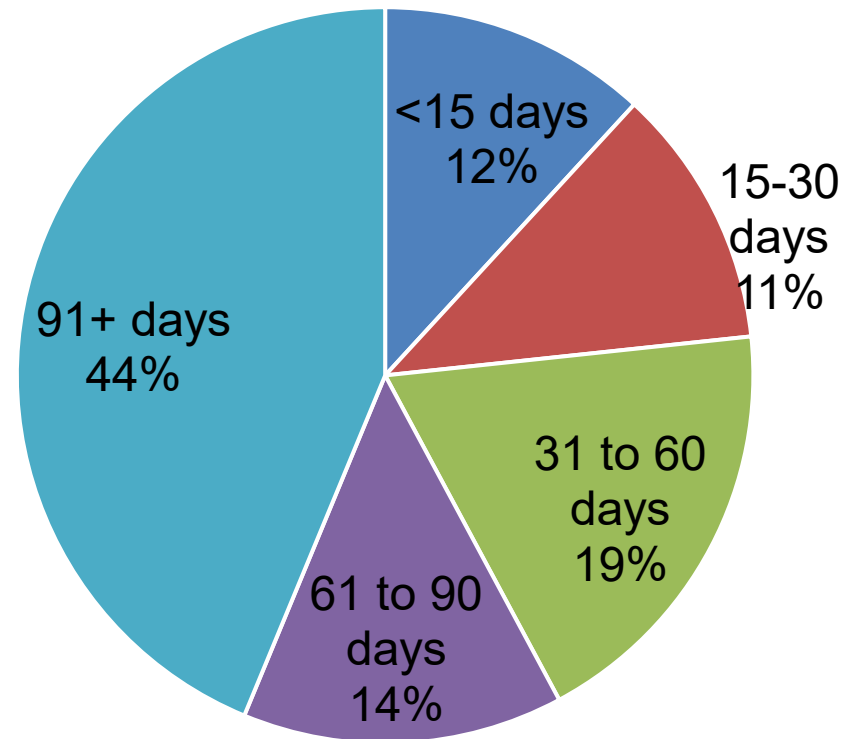
- Corporate TA 3%
- Direct 48%
- Retail TA 18%
- Online TA 18%
- Other TA 13%

Lead Times

- <15 days 12%
- 15-30 days 11%
- 31 to 60 days 19%
- 61 to 90 days 14%
- 91+ days 44%

Source: ARC/ForwardKeys Destination Gateway

U.S.

Direct and Travel Agency Bookings to Hawaii
Current vs. Prior vs. Pre-Pandemic Periods
February 2023

Source: ForwardKeys as of 2/12/23

Six Month Outlook: Japan

Source: ARC/ForwardKeys Destination Gateway

February 23, 2023

Trip Origins: Japan

Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Japan

Distribution Channel

- Corporate TA 12%
- Other TA 13%
- Online TA 5%
- Retail TA 10%
- Direct 60%

Lead Time

- <15 days 10%
- 15-30 days 18%
- 31 to 60 days 25%
- 61 to 90 days 10%
- 91+ days 37%

Source: ARC/ForwardKeys Destination Gateway

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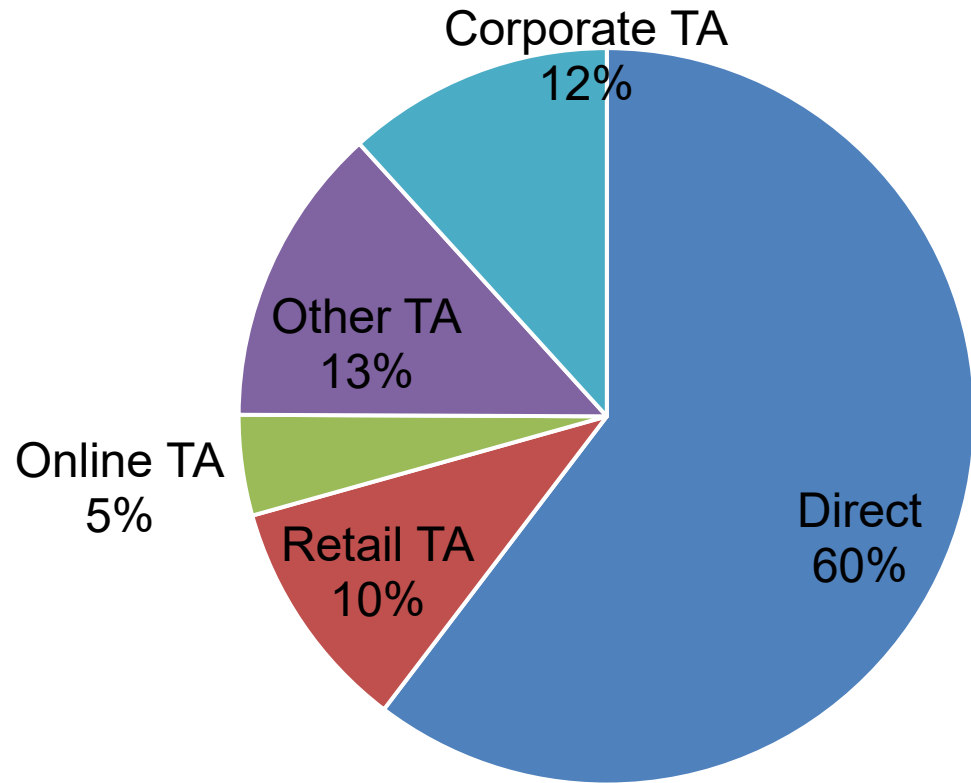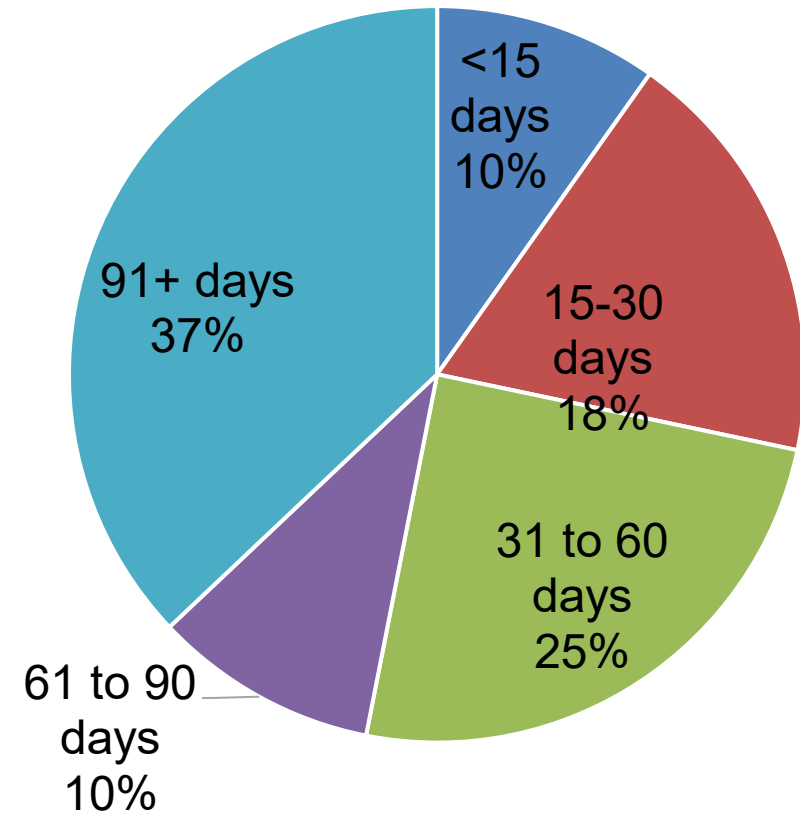
HAWAI'I TOURISM
AUTHORITY

JAPAN

Direct and Travel Agency Bookings to Hawaii
Current vs. Prior vs. Pre-Pandemic Periods
February 2023

Source: ForwardKeys as of 2/12/23

Six Month Outlook: Canada
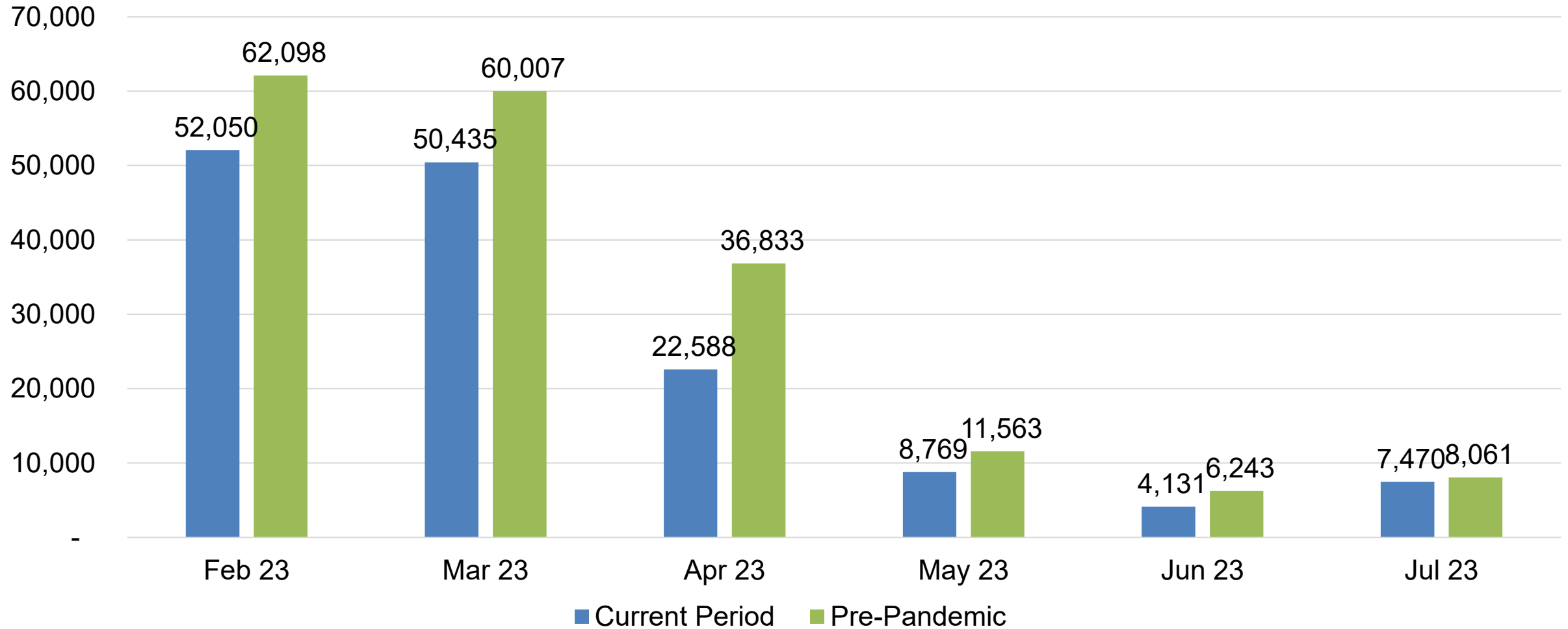
Source: ARC/ForwardKeys Destination Gateway

Trip Origins: Canada

Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Canada

Distribution Channel

Online TA 1%
Other TA 3%
Corporate TA 2%
Retail TA 24%
Direct 70%

Lead Time

<15 days 4%
15-30 days 9%
31 to 60 days 14%
61 to 90 days 14%
91+ days 59%
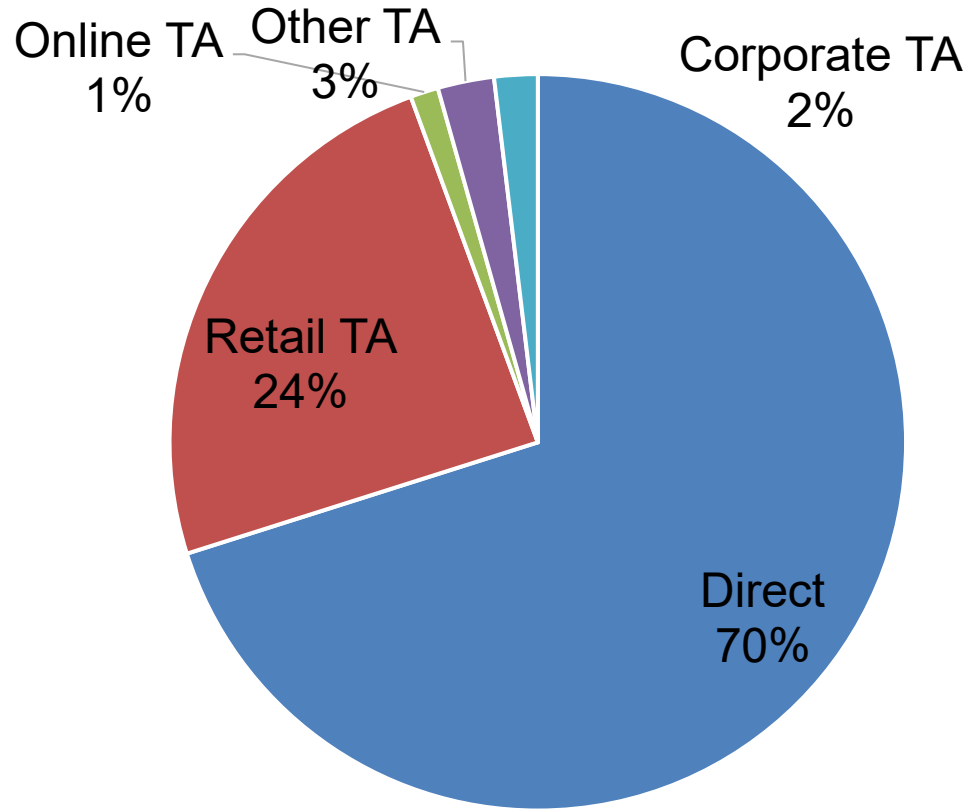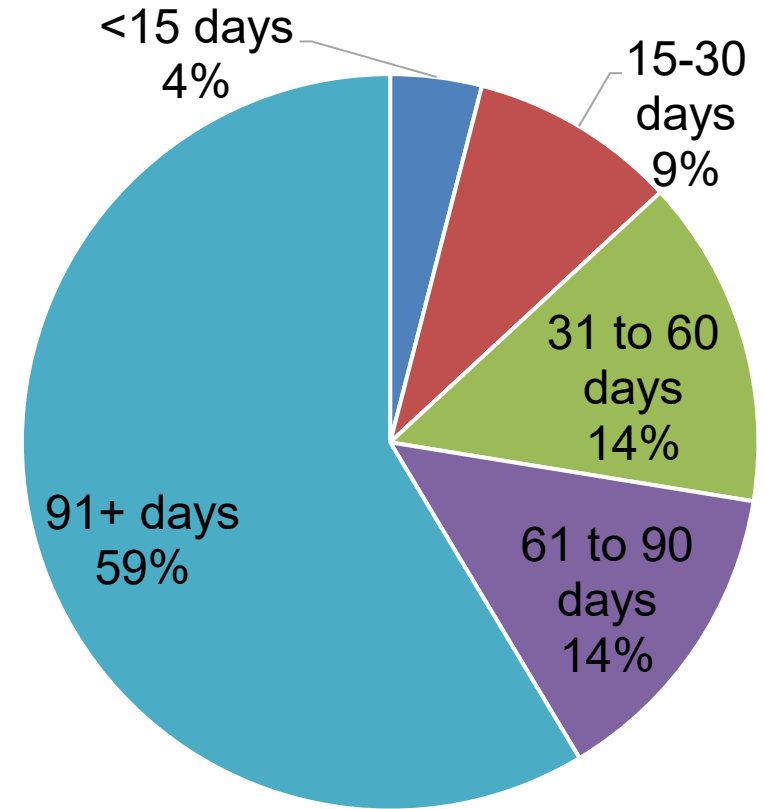
Source: ARC/ForwardKeys Destination Gateway

CANADA

Direct and Travel Agency Bookings to Hawaii
Current vs. Prior vs. Pre-Pandemic Periods
February 2023
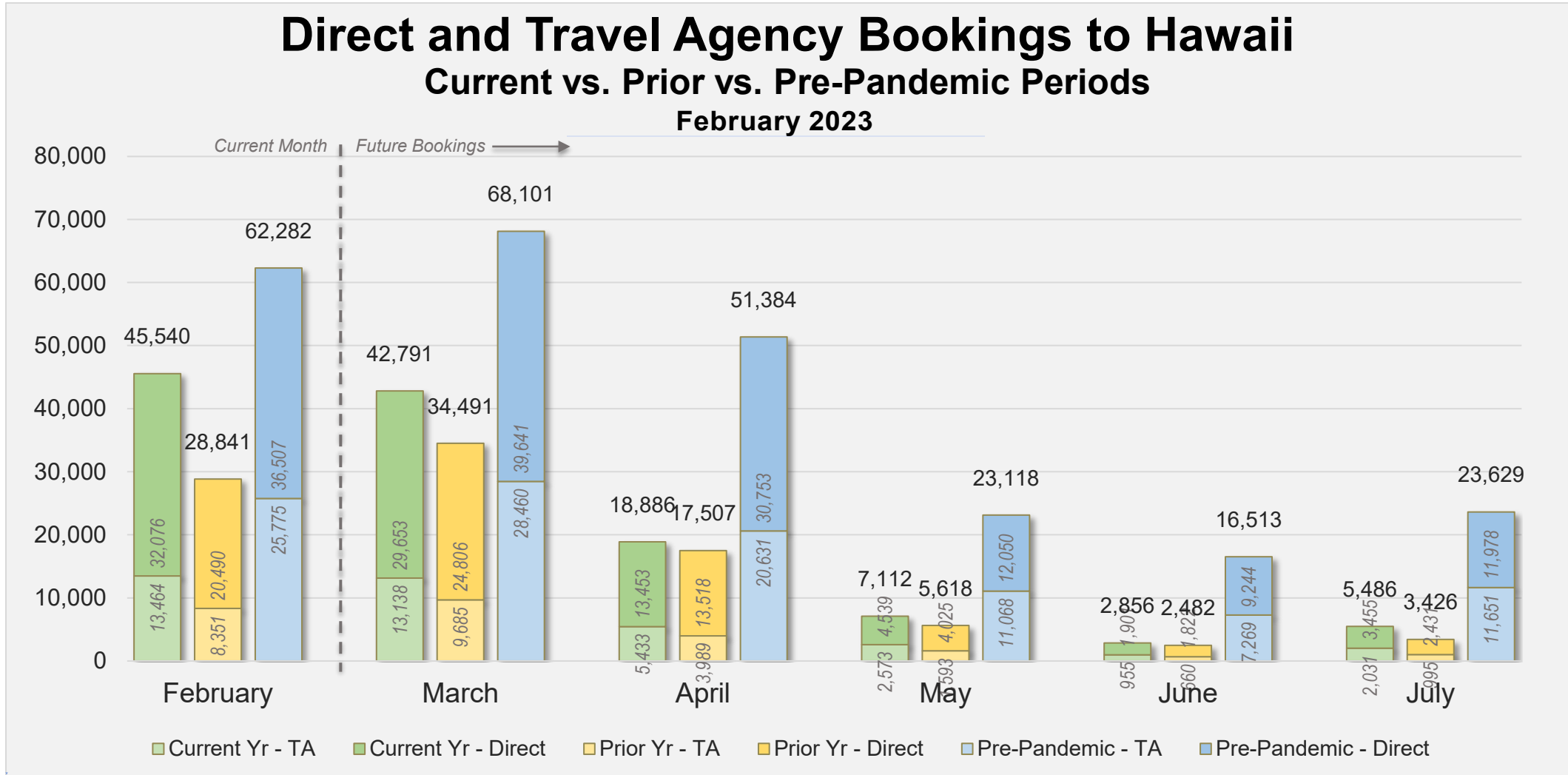
Source: ForwardKeys as of 2/12/23

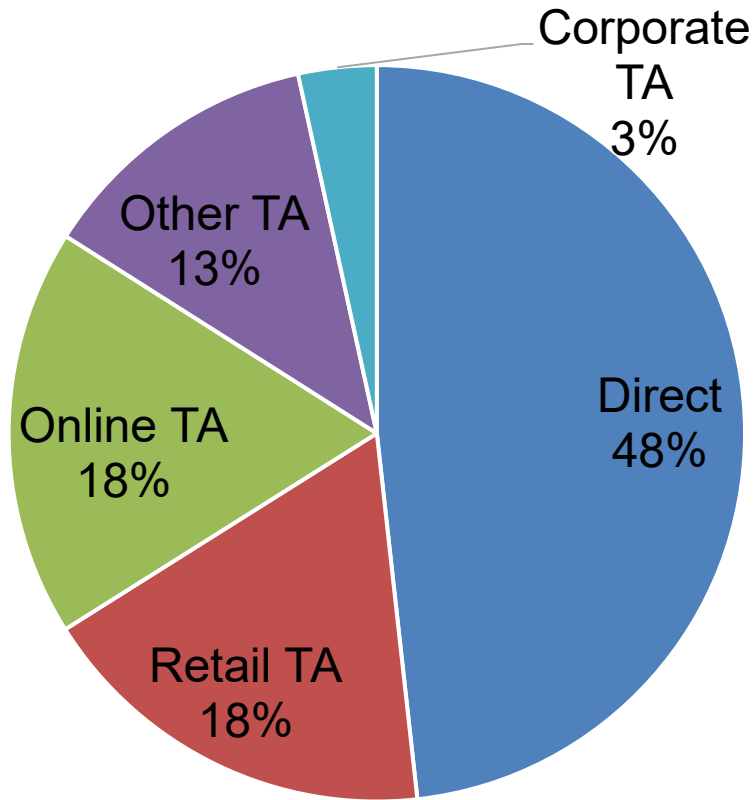# Six Month Outlook: Korea
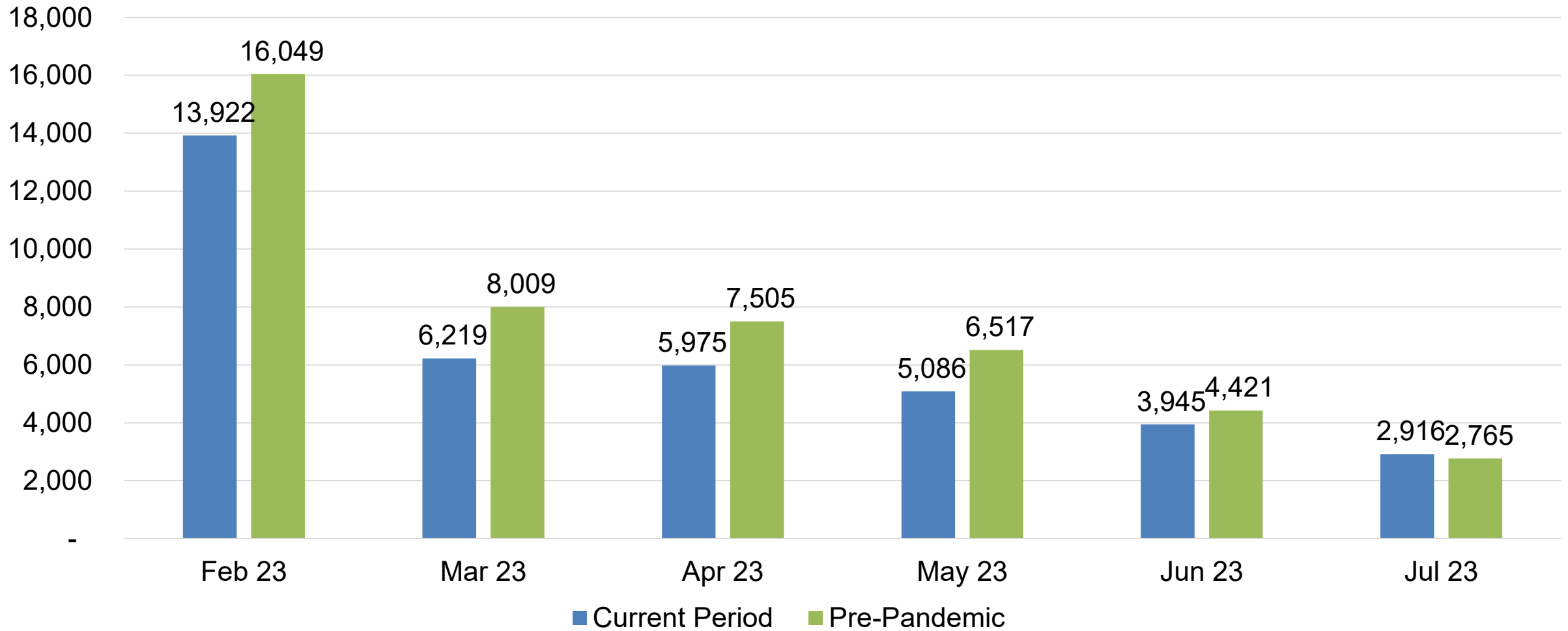
Source: ARC/ForwardKeys Destination Gateway

Trip Origins: Korea
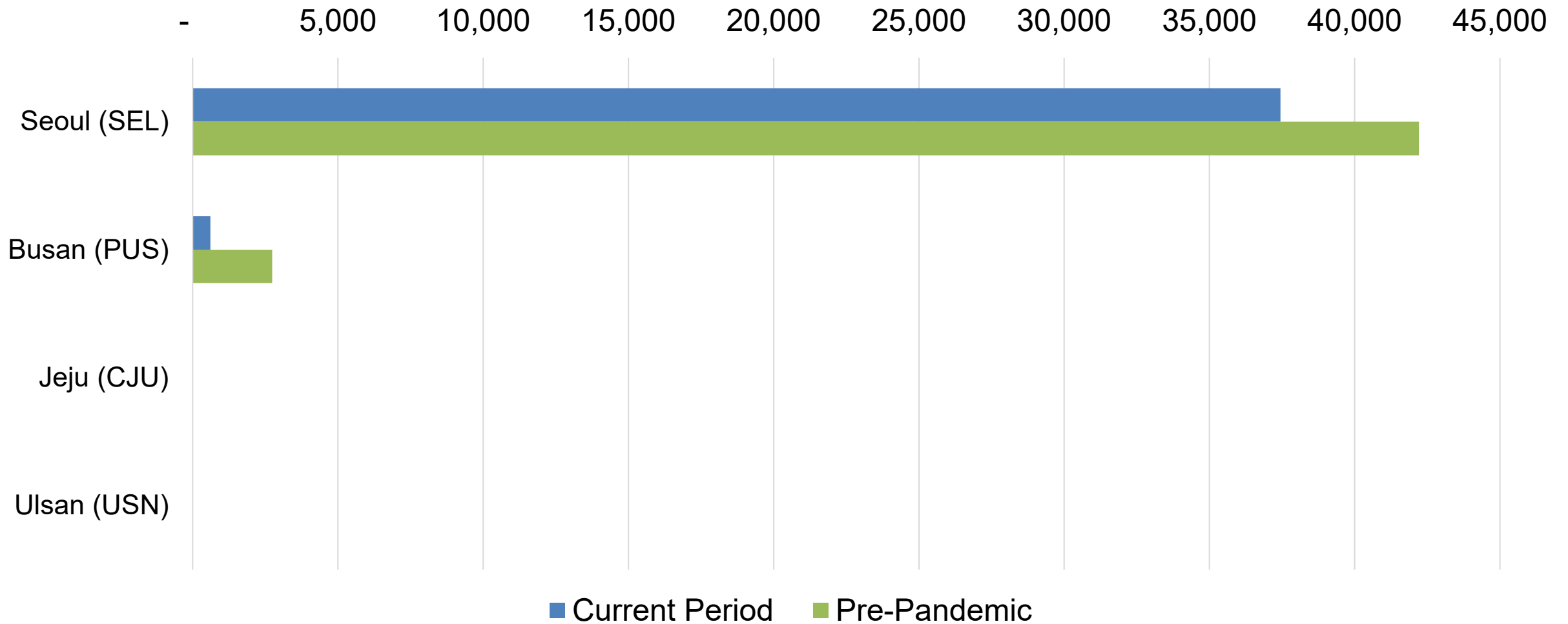
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Korea

Distribution Channel

- Other TA 2%
- Corporate TA 0%
- Online TA 13%
- Direct 46%
- Retail TA 39%

Lead Time

- <15 days 10%
- 15-30 days 11%
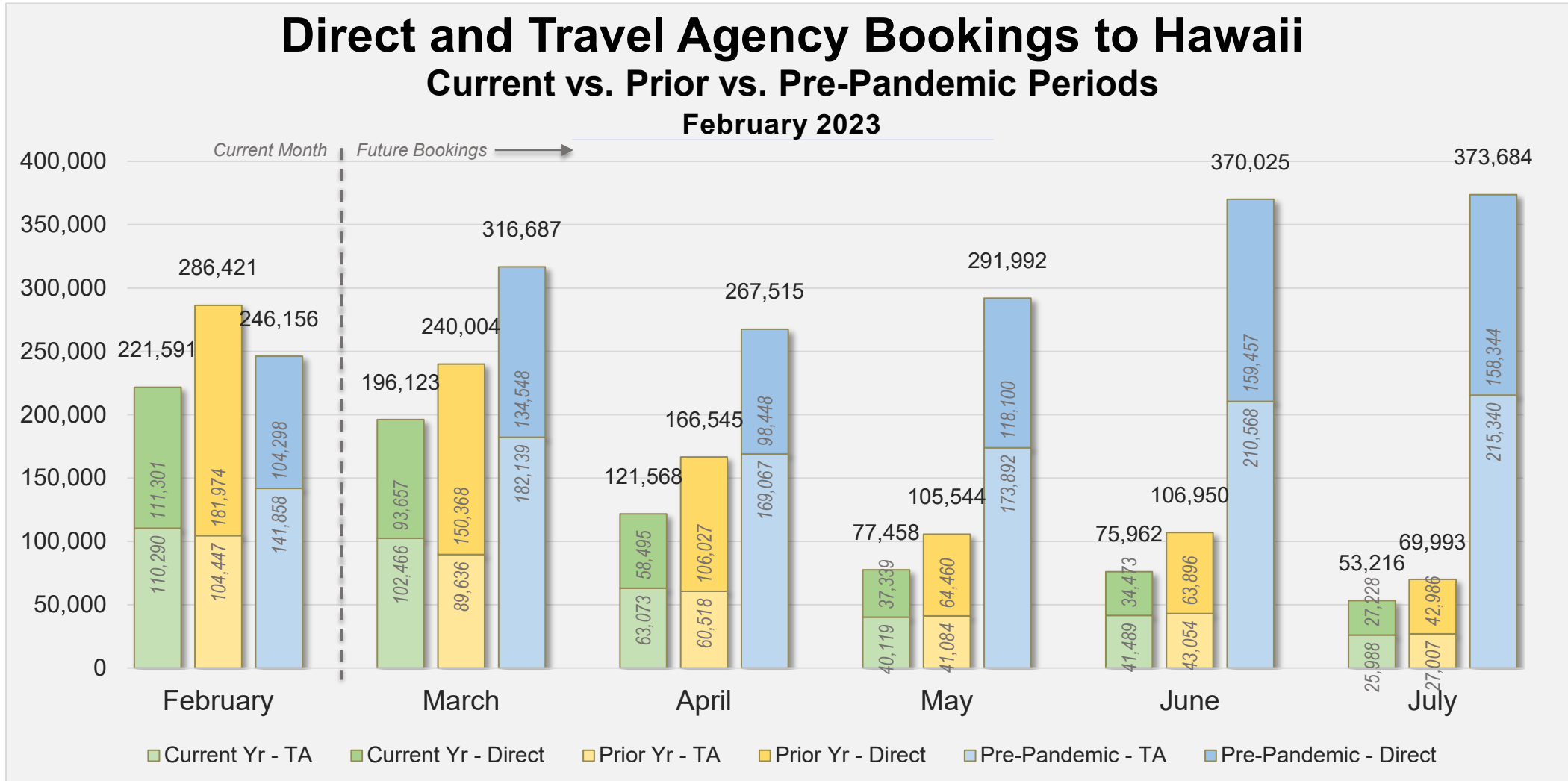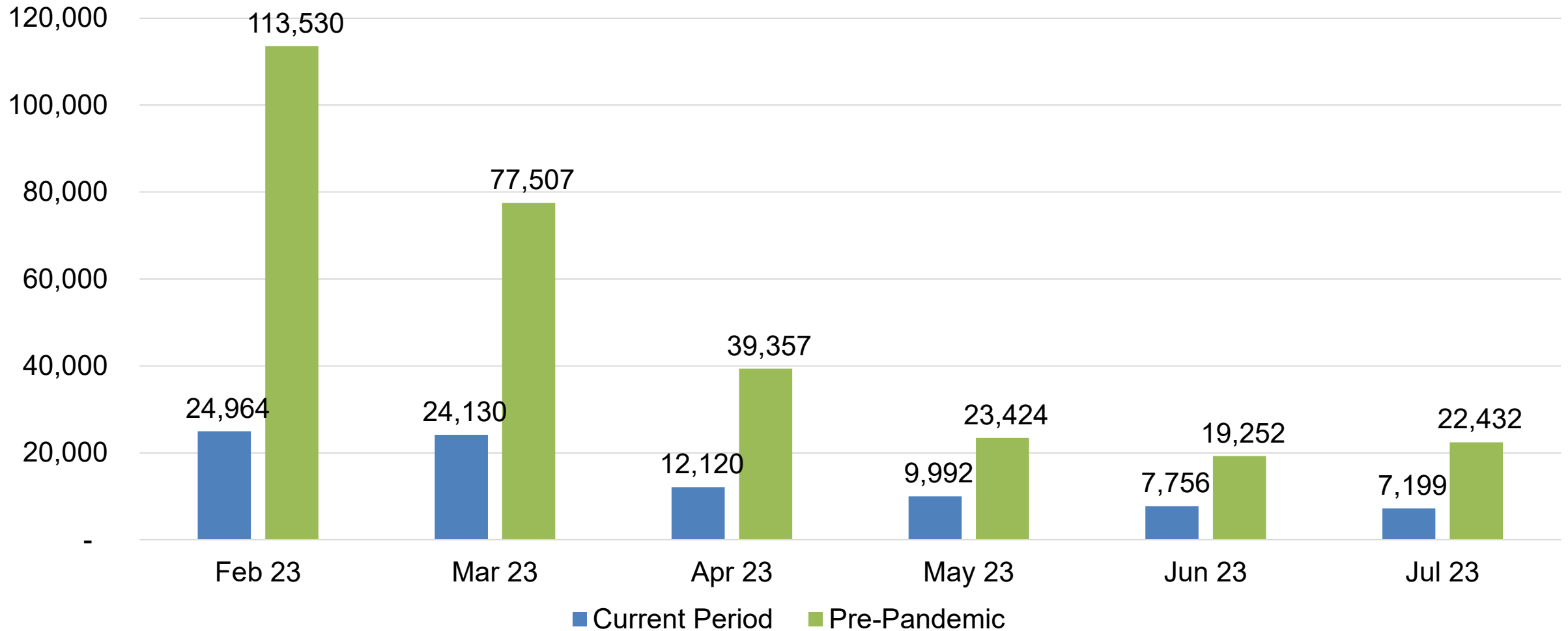- 31 to 60 days 21%
- 61 to 90 days 17%
- 91+ days 41%
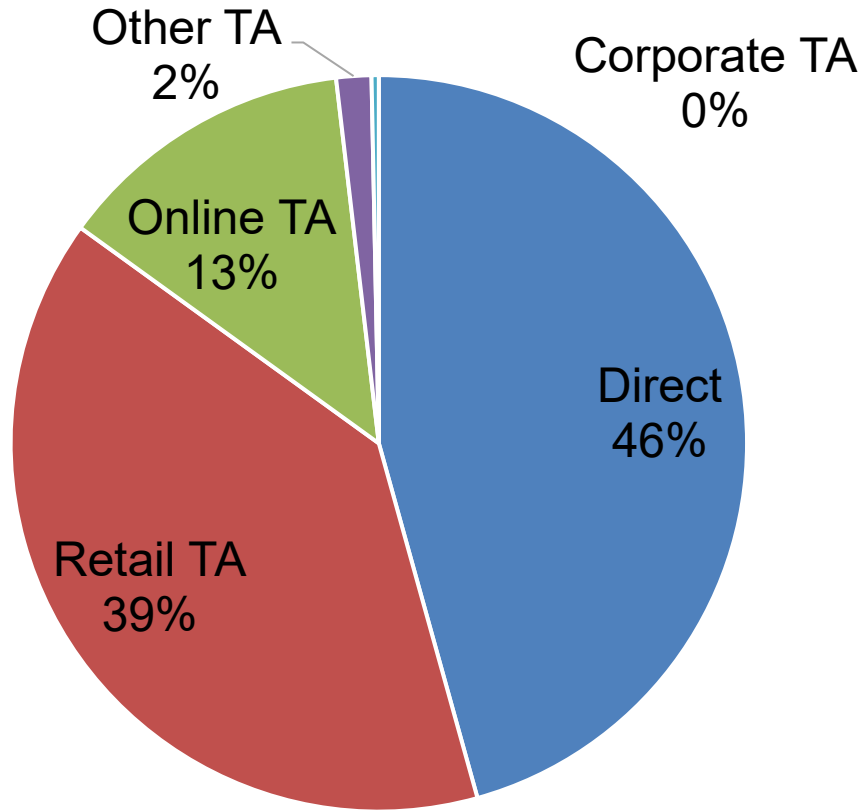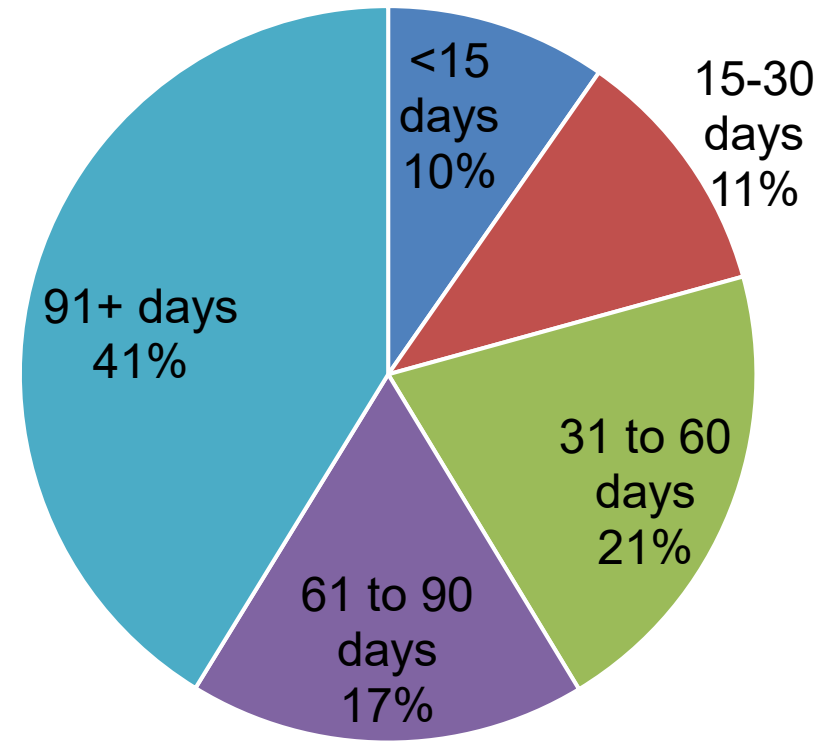
Source: ARC/ForwardKeys Destination Gateway

KOREA

Direct and Travel Agency Bookings to Hawaii
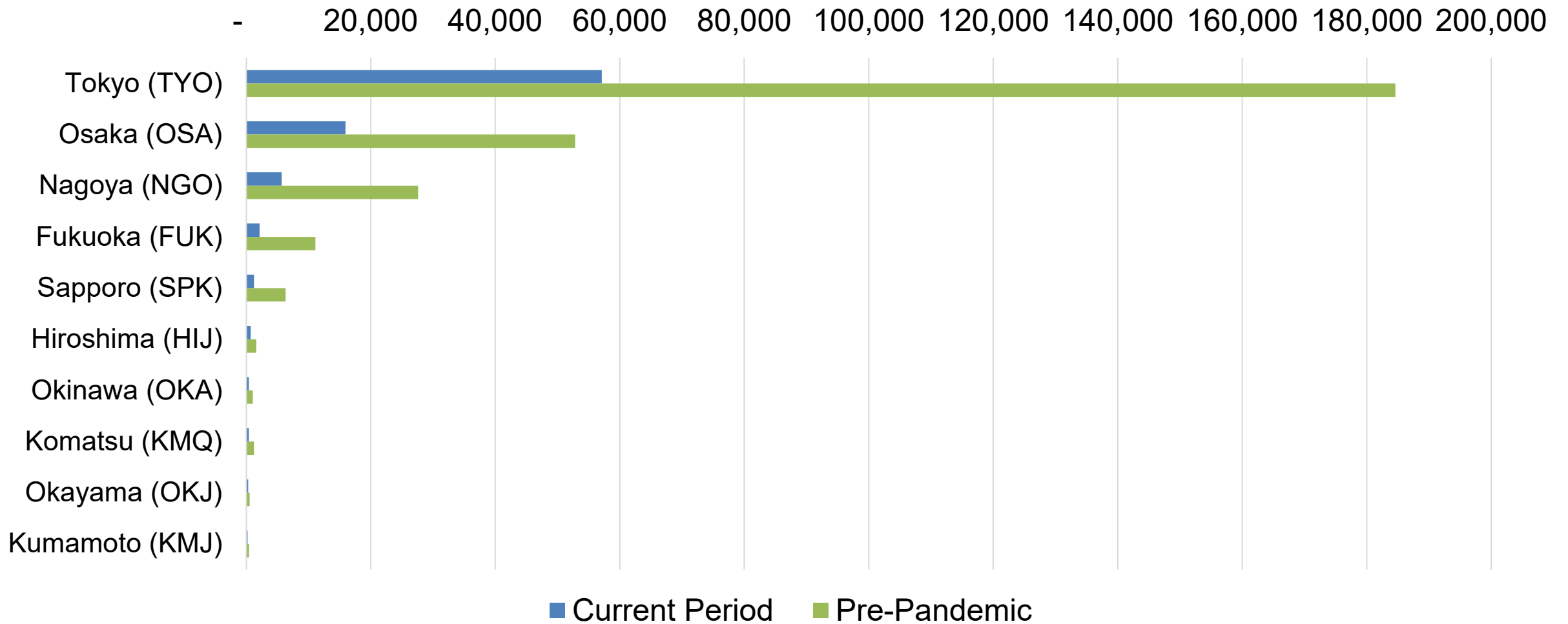Current vs. Prior vs. Pre-Pandemic Periods
February 2023

Current Month | Future Bookings →

February:
- 13,199 (Current Yr: TA 7,248 / Direct 5,951)
- 1,937 (Prior Yr: TA 1,022 / Direct 915)
- 17,496 (Pre-Pandemic: TA 13,268 / Direct 4,228)

March:
- 5,763 (Current Yr: TA 3,457 / Direct 2,306)
- 1,573 (Prior Yr: TA 997 / Direct 576)
- 13,085 (Pre-Pandemic: TA 9,997 / Direct 3,088)

April:
- 5,401 (Current Yr: TA 3,087 / Direct 2,314)
- 1,584 (Prior Yr: TA 709 / Direct 875)
- 15,117 (Pre-Pandemic: TA 11,642 / Direct 3,475)

May:
- 4,589 (Current Yr: TA 2,557 / Direct 2,032)
- 1,527 (Prior Yr: TA 701 / Direct 826)
- 16,623 (Pre-Pandemic: TA 12,519 / Direct 4,104)

June:
- 3,462 (Current Yr: TA 1,634 / Direct 1,828)
- 905 (Prior Yr: TA 317 / Direct 588)
- 17,561 (Pre-Pandemic: TA 13,328 / Direct 4,233)

July:
- 2,571 (Current Yr: TA 870 / Direct 1,701)
- 922 (Prior Yr: TA 137 / Direct 785)
- 17,232 (Pre-Pandemic: TA 12,521 / Direct 4,711)

Legend: Current Yr - TA | Current Yr - Direct | Prior Yr - TA | Prior Yr - Direct | Pre-Pandemic - TA | Pre-Pandemic - Direct

Source: ForwardKeys as of 2/12/23

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

HAWAI'I TOURISM AUTHORITY

Six Month Outlook: Australia

Chart: Monthly comparison of Current Period vs Pre-Pandemic visitor figures

Month	Current Period	Pre-Pandemic
Feb 23	3,290	5,597
Mar 23	3,244	6,621
Apr 23	4,358	9,060
May 23	3,640	8,069
Jun 23	2,642	5,511
Jul 23	1,909	5,114

■ Current Period   ■ Pre-Pandemic

Source: ARC/ForwardKeys Destination Gateway

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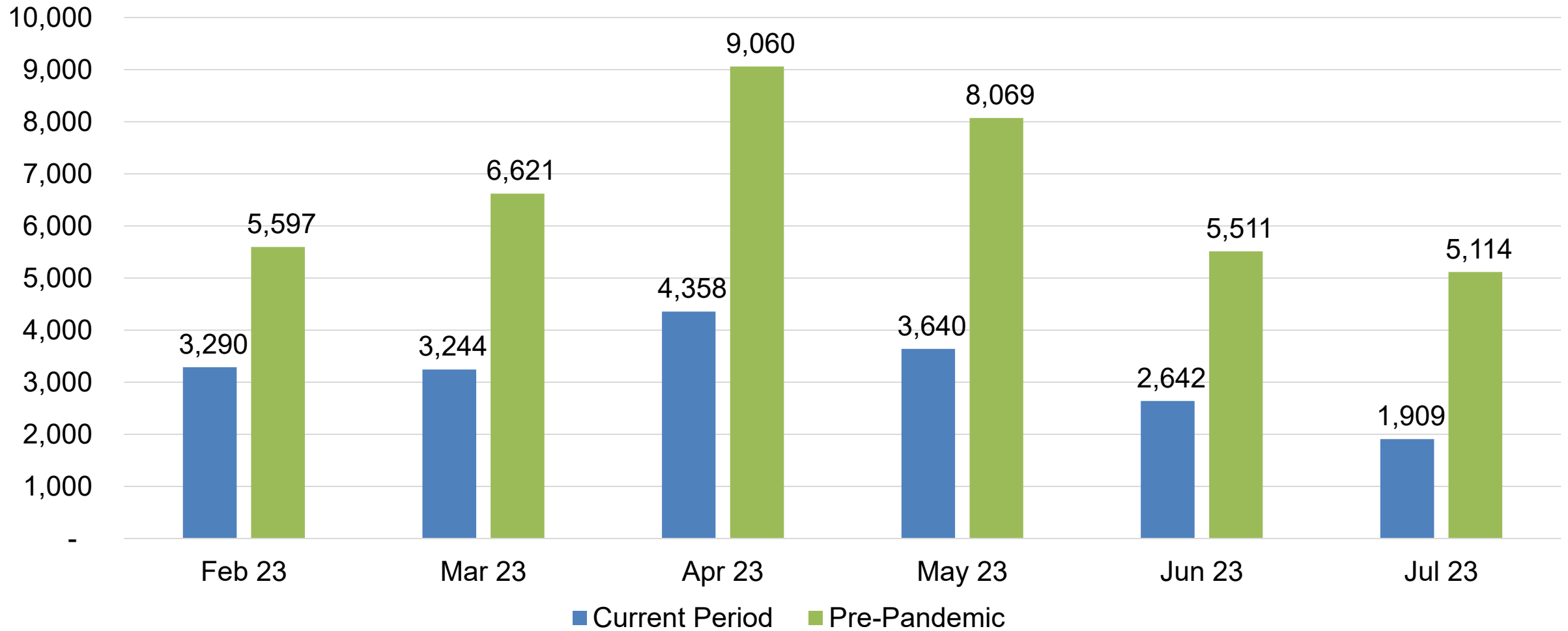
HAWAI'I TOURISM AUTHORITY

Trip Origins: Australia
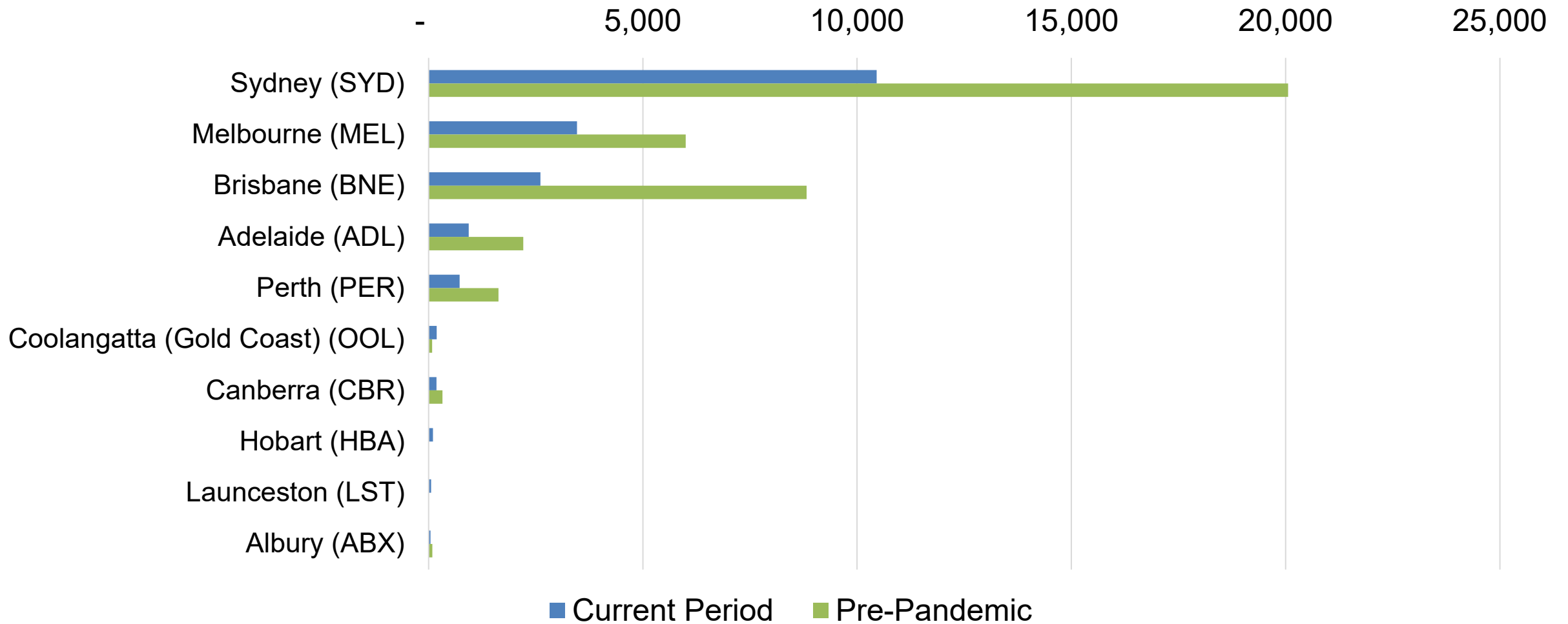
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Australia

Distribution Channel

- Corporate TA 7%
- Direct 7%
- Other TA 6%
- Online TA 6%
- Retail TA 74%

Lead Time

- <15 days 1%
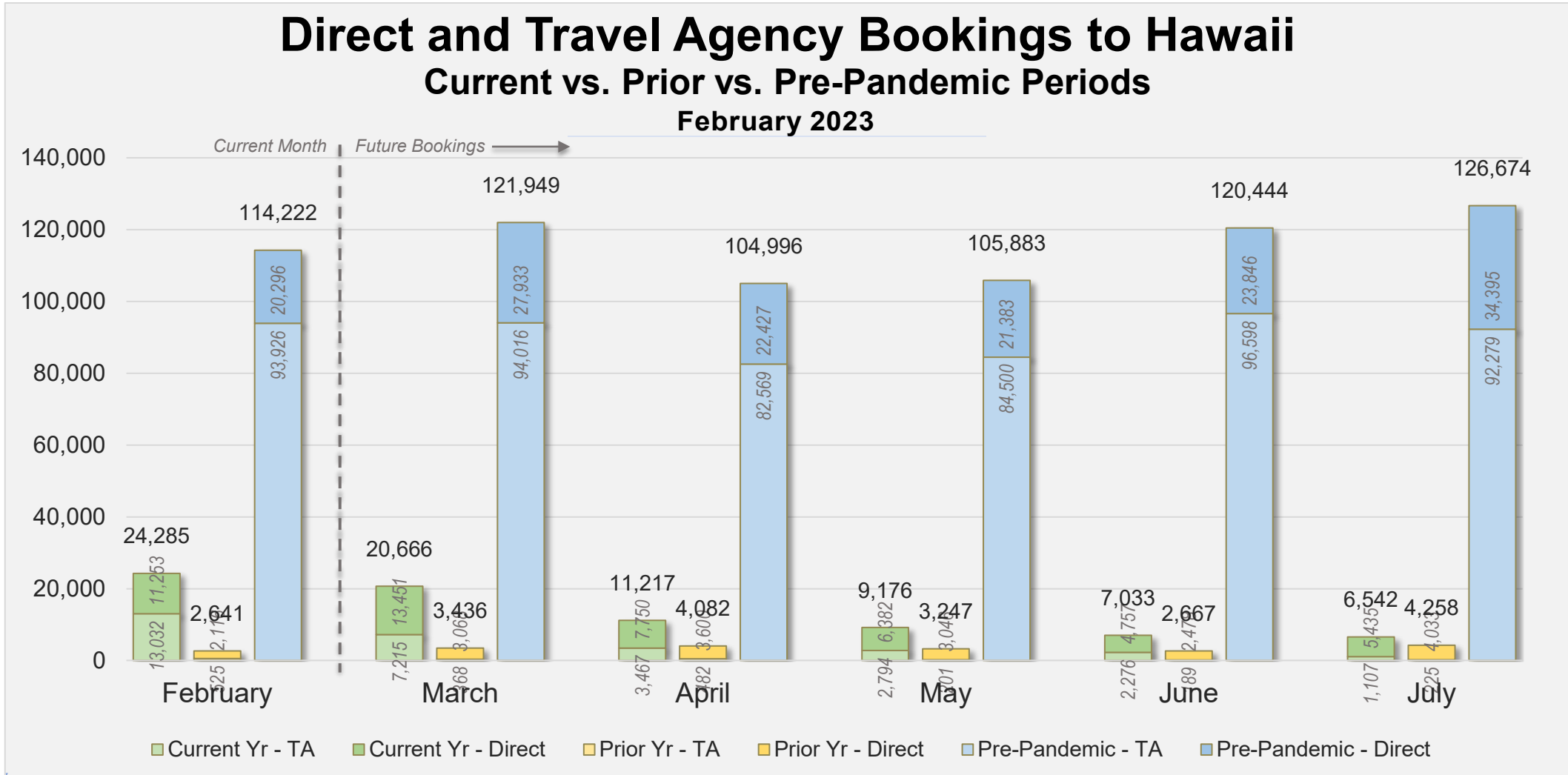- 15-30 days 3%
- 31 to 60 days 7%
- 61 to 90 days 9%
- 91+ days 80%
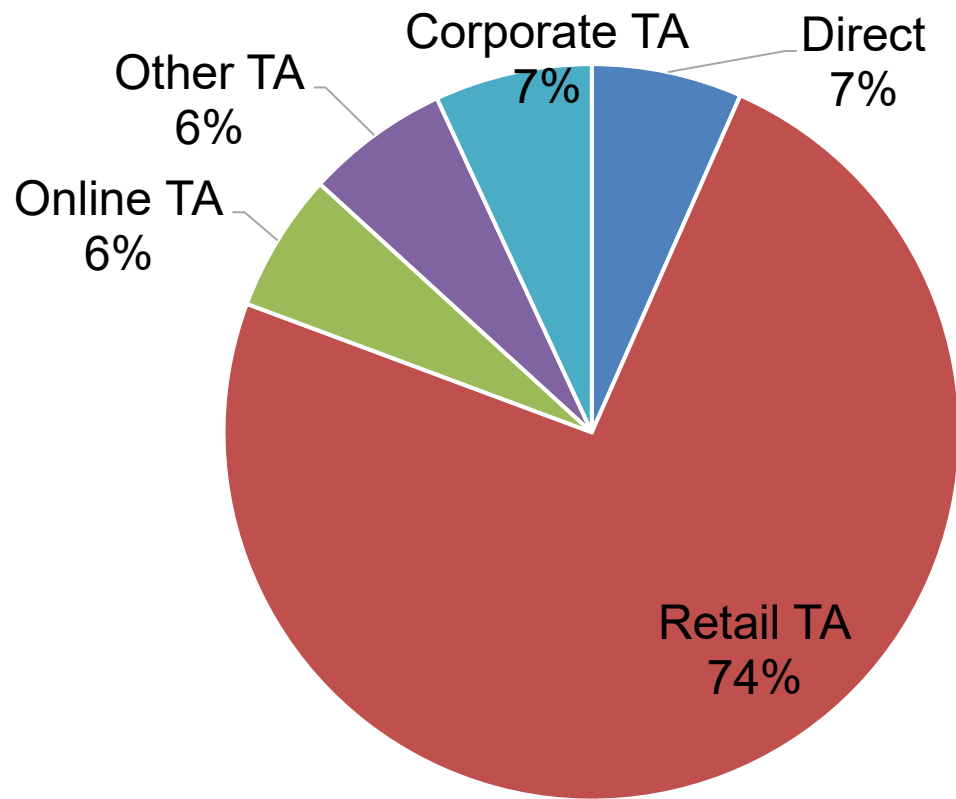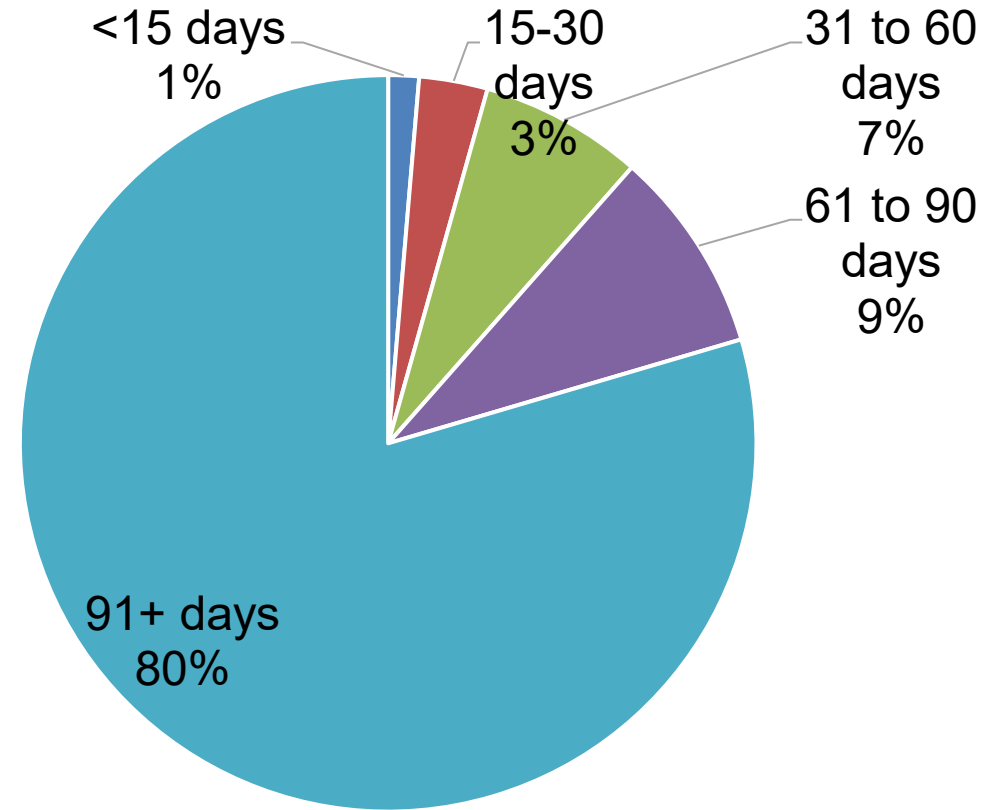
Source: ARC/ForwardKeys Destination Gateway

AUSTRALIA

Direct and Travel Agency Bookings to Hawaii
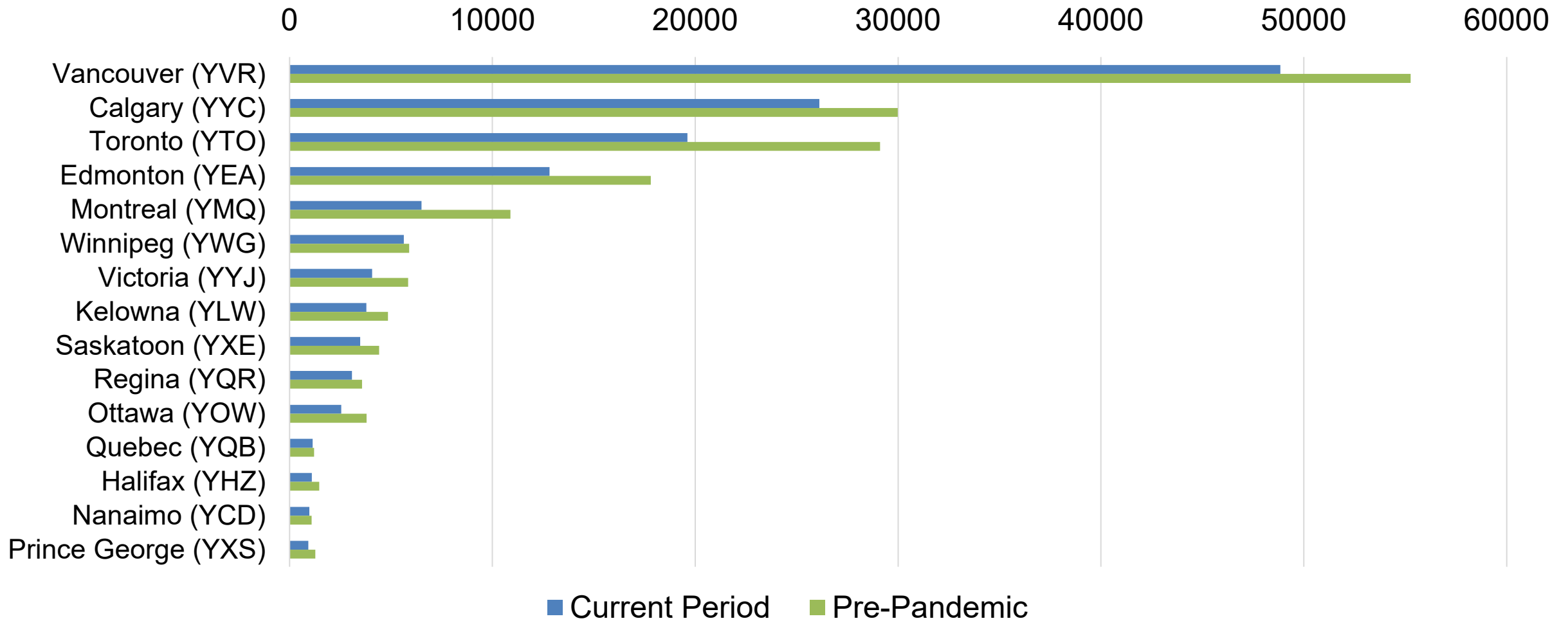Current vs. Prior vs. Pre-Pandemic Periods
February 2023
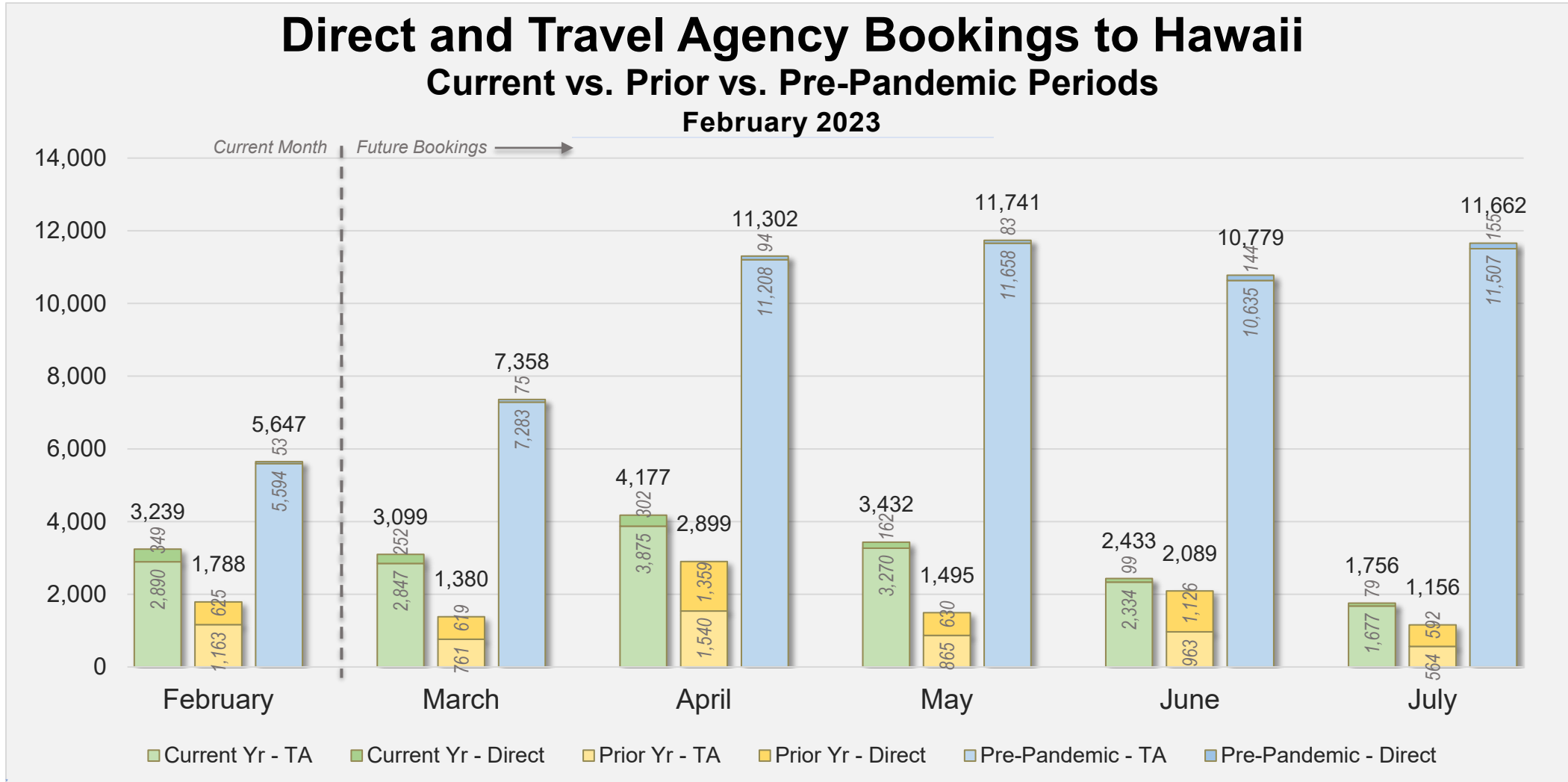
Source: ForwardKeys as of 2/12/23
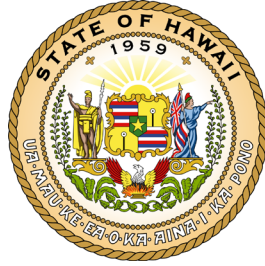
VISITOR SATISFACTION STUDY Q4 2022

State of Hawai'i
Department of Business, Economic Development & Tourism

Prepared By:

[ANTHOLOGY®]
RESEARCH

www.AnthologyResearch.com

Satisfaction – State of Hawai'i by Visitor Market

8-pt Rating Scale
8=Excellent / 1=Poor

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	87.5%	88.7%	79.5%	87.4%	75.2%	85.5%
■ Above Avg (5-6)	10.2%	9.7%	19.0%	11.3%	21.6%	13.9%
■ Below Avg (3-4)	1.9%	1.2%	1.5%	1.2%	3.2%	0.6%
■ Poor (1-2)	0.3%	0.3%		0.1%		
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	7.47	7.52	7.13	7.44	7.11	7.39
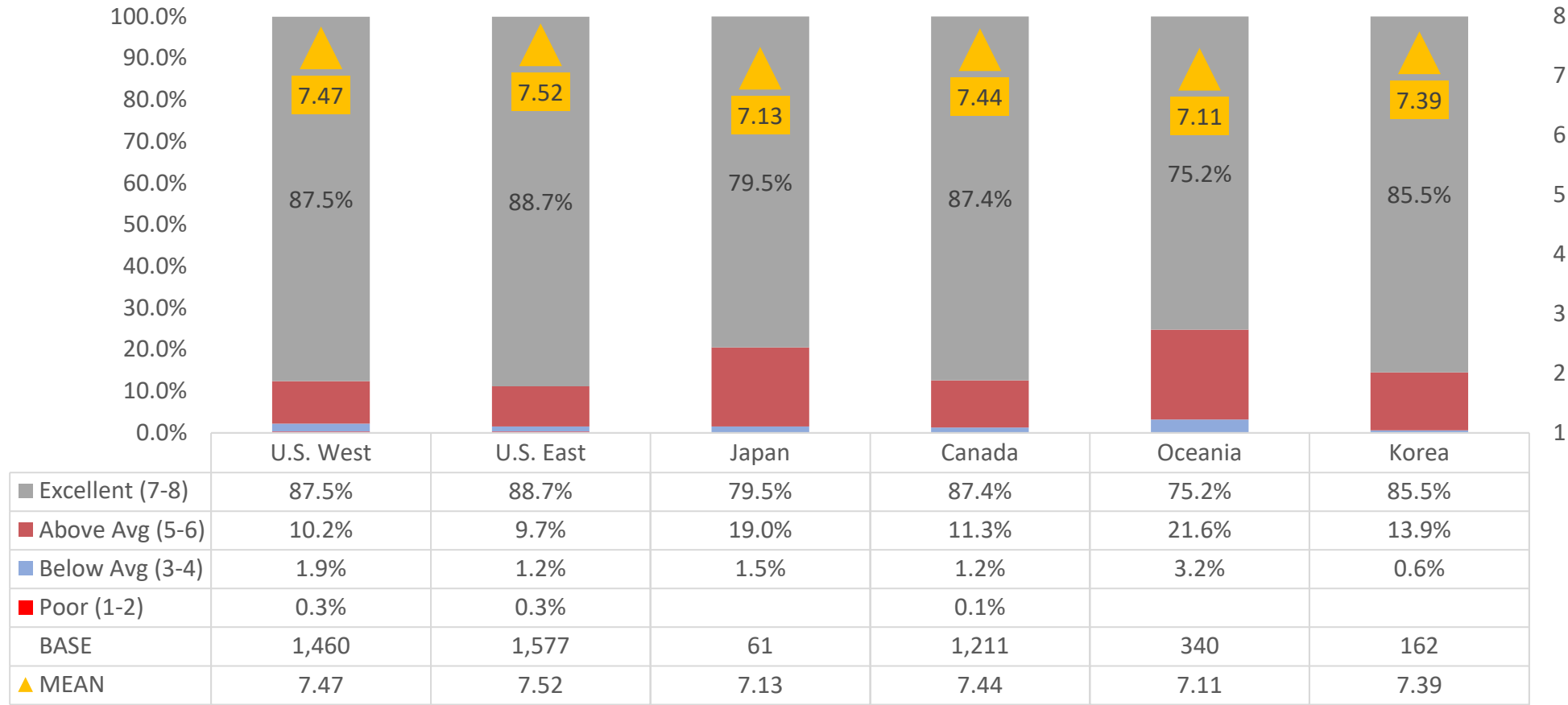
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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SATISFACTION – HAWAIʻI TRIP EXPECTATIONS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Exceeded expectations	42.6%	51.3%	43.8%	43.7%	32.5%	68.0%
■ Met expectations	53.5%	45.7%	53.1%	52.9%	61.7%	30.2%
■ Did NOT meet expectations	3.8%	3.0%	3.0%	3.4%	5.9%	1.8%
BASE	1,460	1,577	61	1,211	340	162
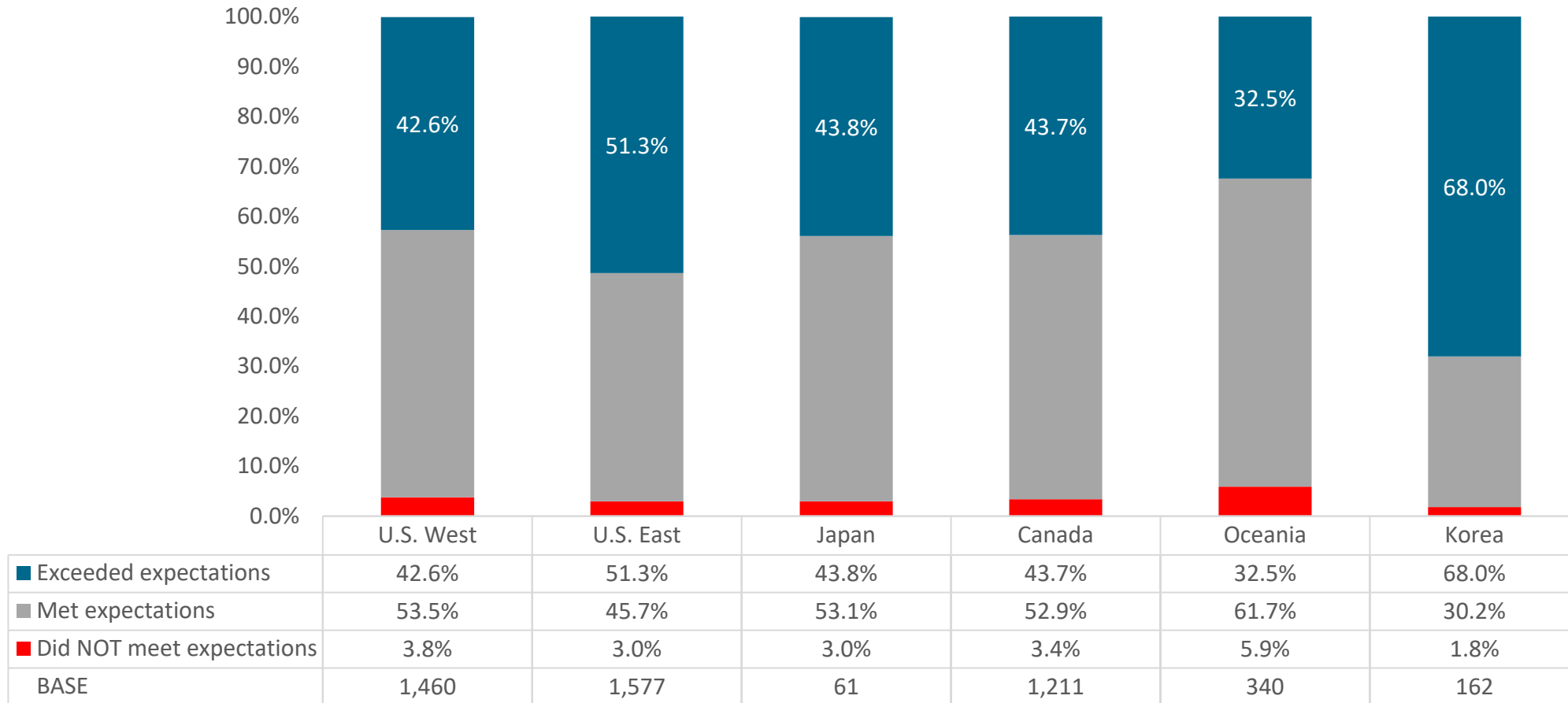
Q. Would you say this trip to Hawaiʻi___?

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BRAND/ DESTINATION - ADVOCACY

8-pt Rating Scale
8=Very likely / 1=Very unlikely

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Very likely (7-8)	88.9%	89.1%	75.0%	87.2%	79.4%	76.7%
■ Somewhat likely (5-6)	8.9%	8.8%	18.2%	10.6%	15.6%	21.9%
■ Somewhat unlikely (3-4)	1.1%	1.5%	3.0%	1.3%	3.5%	1.4%
■ Very unlikely (1-2)	0.8%	0.6%	2.3%	0.9%	1.2%	
■ Don't know	0.3%	0.1%	1.5%		0.3%	
BASE	1,460	1,577	61	1211	340	162
▲ MEAN	7.57	7.59	7.09	7.51	7.24	7.29
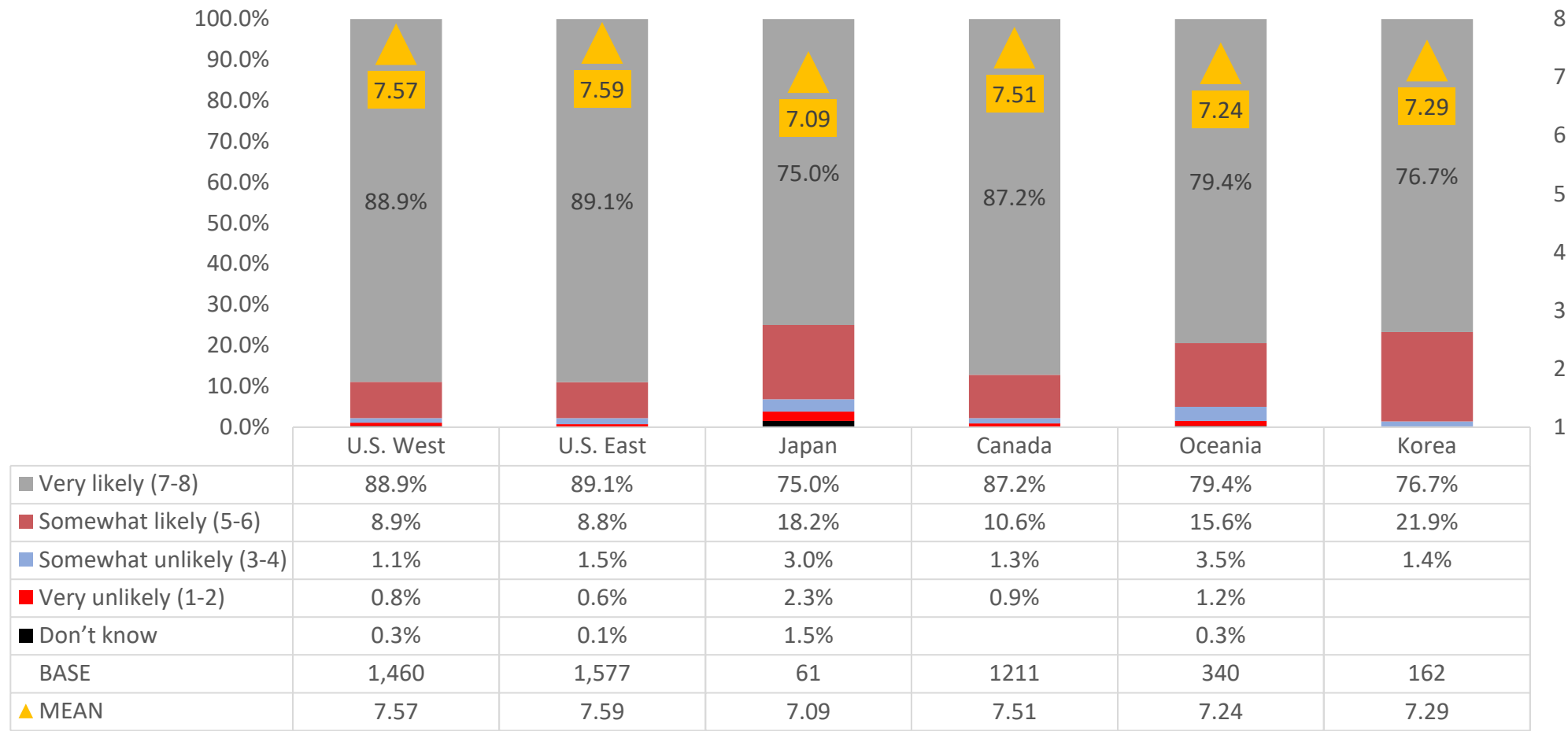
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale
8=Very likely / 1=Very unlikely
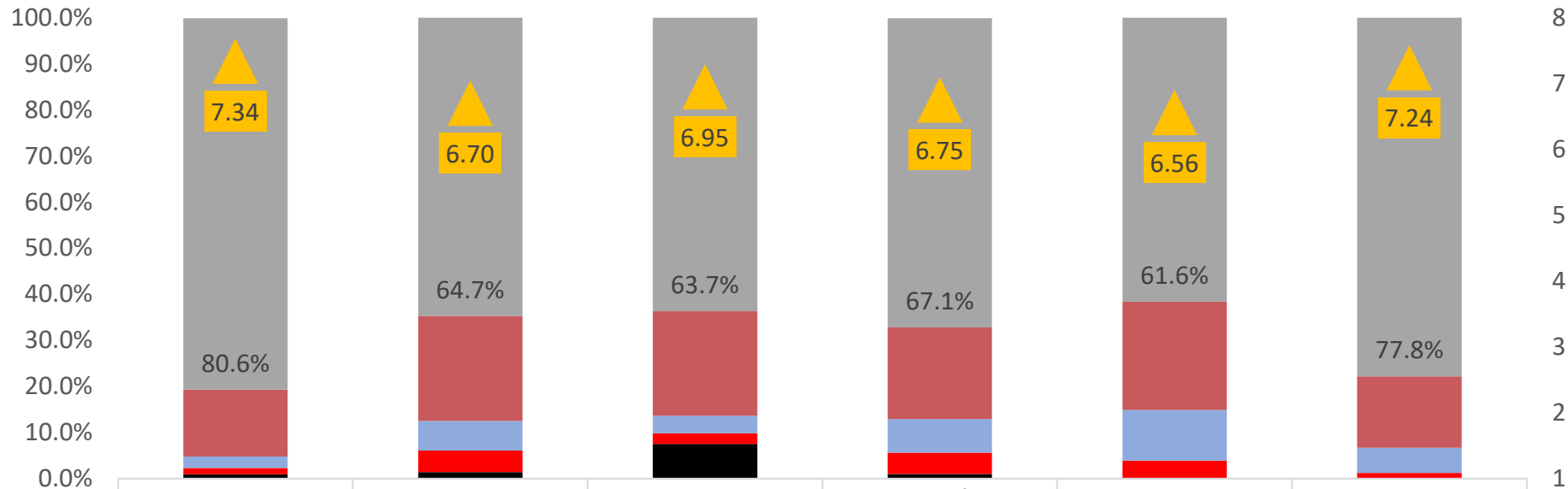
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Very likely (7-8)	80.6%	64.7%	63.7%	67.1%	61.6%	77.8%
■ Somewhat likely (5-6)	14.5%	22.8%	22.7%	19.9%	23.5%	15.5%
■ Somewhat unlikely (3-4)	2.5%	6.4%	3.8%	7.3%	11.0%	5.5%
■ Very unlikely (1-2)	1.4%	4.7%	2.3%	4.6%	3.9%	1.2%
■ Don't know	0.9%	1.4%	7.5%	1.0%		
BASE	1,460	1,577	61	1211	340	162
▲ MEAN	7.34	6.70	6.95	6.75	6.56	7.24

Q. How likely are you to return to the state of Hawai'i in the next five years?

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51 February 23, 2023

OFFERING A VARIETY OF EXPERIENCES

8-pt Rating Scale
8=Excellent/ 1=Poor
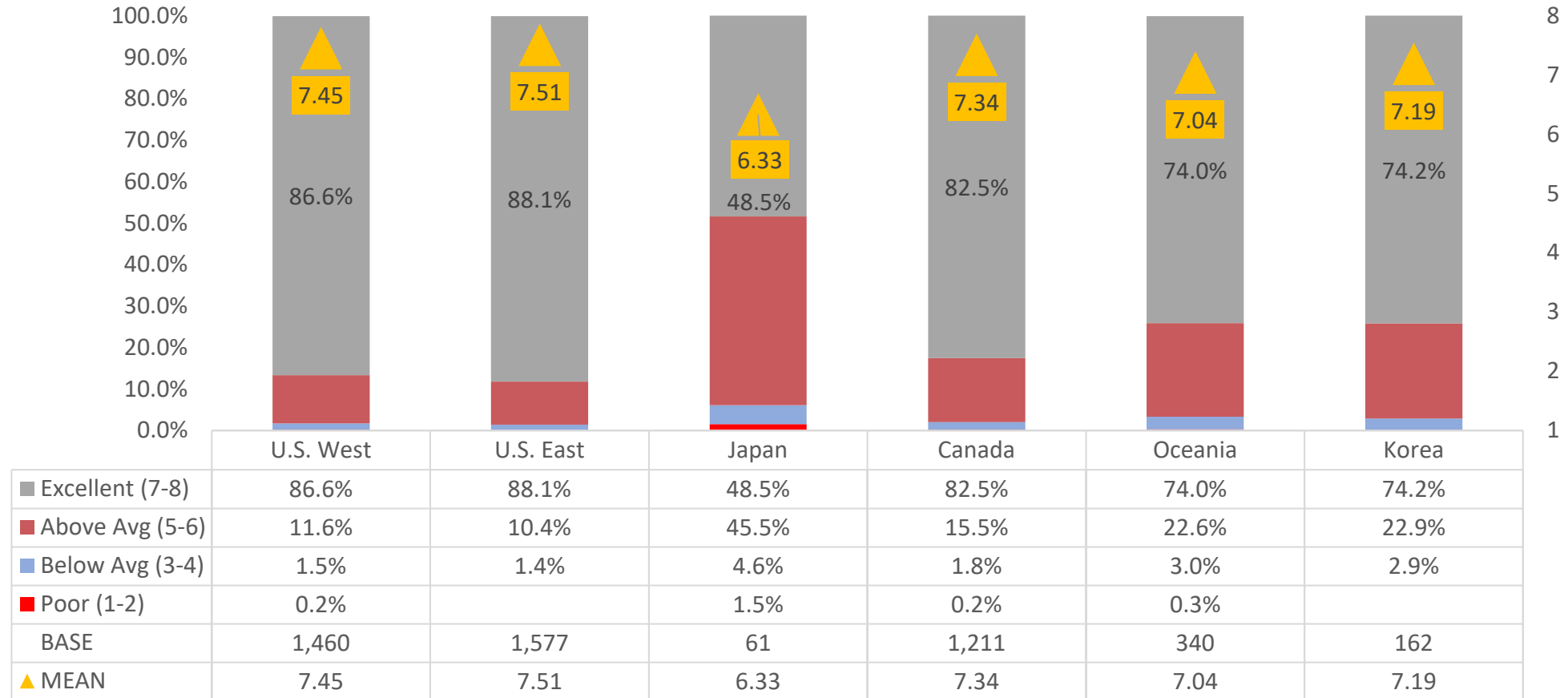
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	86.6%	88.1%	48.5%	82.5%	74.0%	74.2%
■ Above Avg (5-6)	11.6%	10.4%	45.5%	15.5%	22.6%	22.9%
■ Below Avg (3-4)	1.5%	1.4%	4.6%	1.8%	3.0%	2.9%
■ Poor (1-2)	0.2%		1.5%	0.2%	0.3%	
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	7.45	7.51	6.33	7.34	7.04	7.19

Q. Based on your most recent trip to Hawaiʻi, how would you rate the state of Hawaiʻi on___?

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NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

8-pt Rating Scale
8=Excellent/ 1=Poor
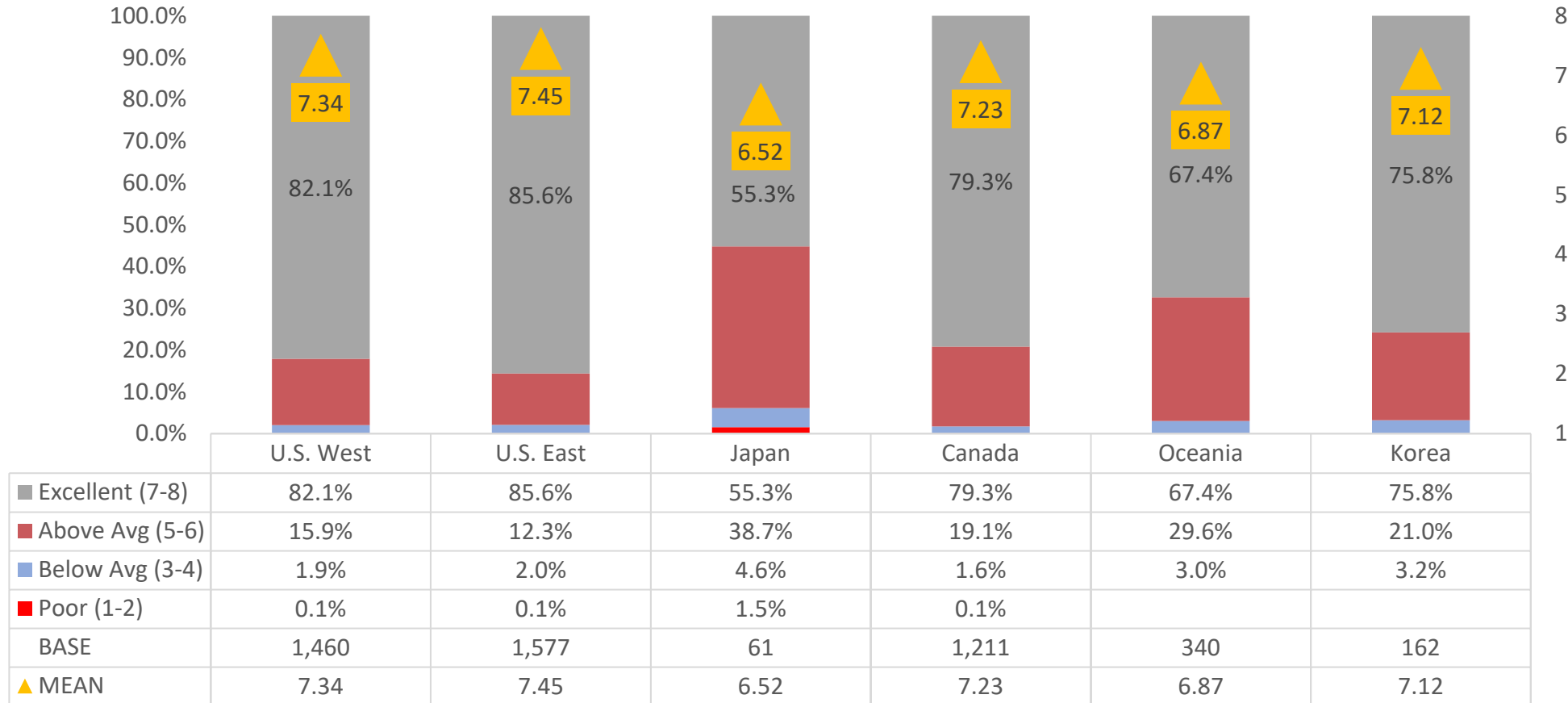
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	82.1%	85.6%	55.3%	79.3%	67.4%	75.8%
■ Above Avg (5-6)	15.9%	12.3%	38.7%	19.1%	29.6%	21.0%
■ Below Avg (3-4)	1.9%	2.0%	4.6%	1.6%	3.0%	3.2%
■ Poor (1-2)	0.1%	0.1%	1.5%	0.1%		
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	7.34	7.45	6.52	7.23	6.87	7.12

Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

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SAFE AND SECURE DESTINATION

8-pt Rating Scale
8=Excellent/ 1=Poor
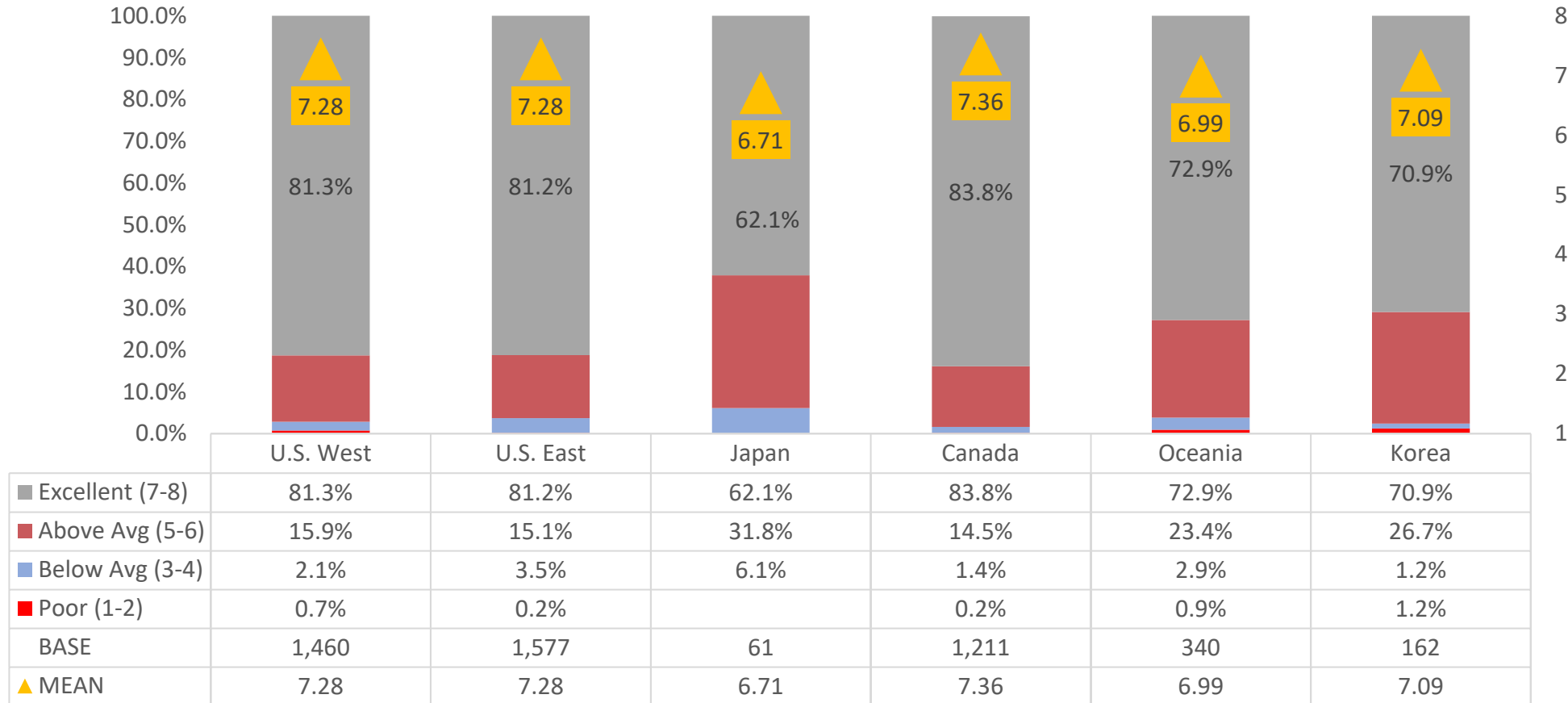
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	81.3%	81.2%	62.1%	83.8%	72.9%	70.9%
■ Above Avg (5-6)	15.9%	15.1%	31.8%	14.5%	23.4%	26.7%
■ Below Avg (3-4)	2.1%	3.5%	6.1%	1.4%	2.9%	1.2%
■ Poor (1-2)	0.7%	0.2%		0.2%	0.9%	1.2%
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	7.28	7.28	6.71	7.36	6.99	7.09

Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

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ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

8-pt Rating Scale
8=Excellent/ 1=Poor
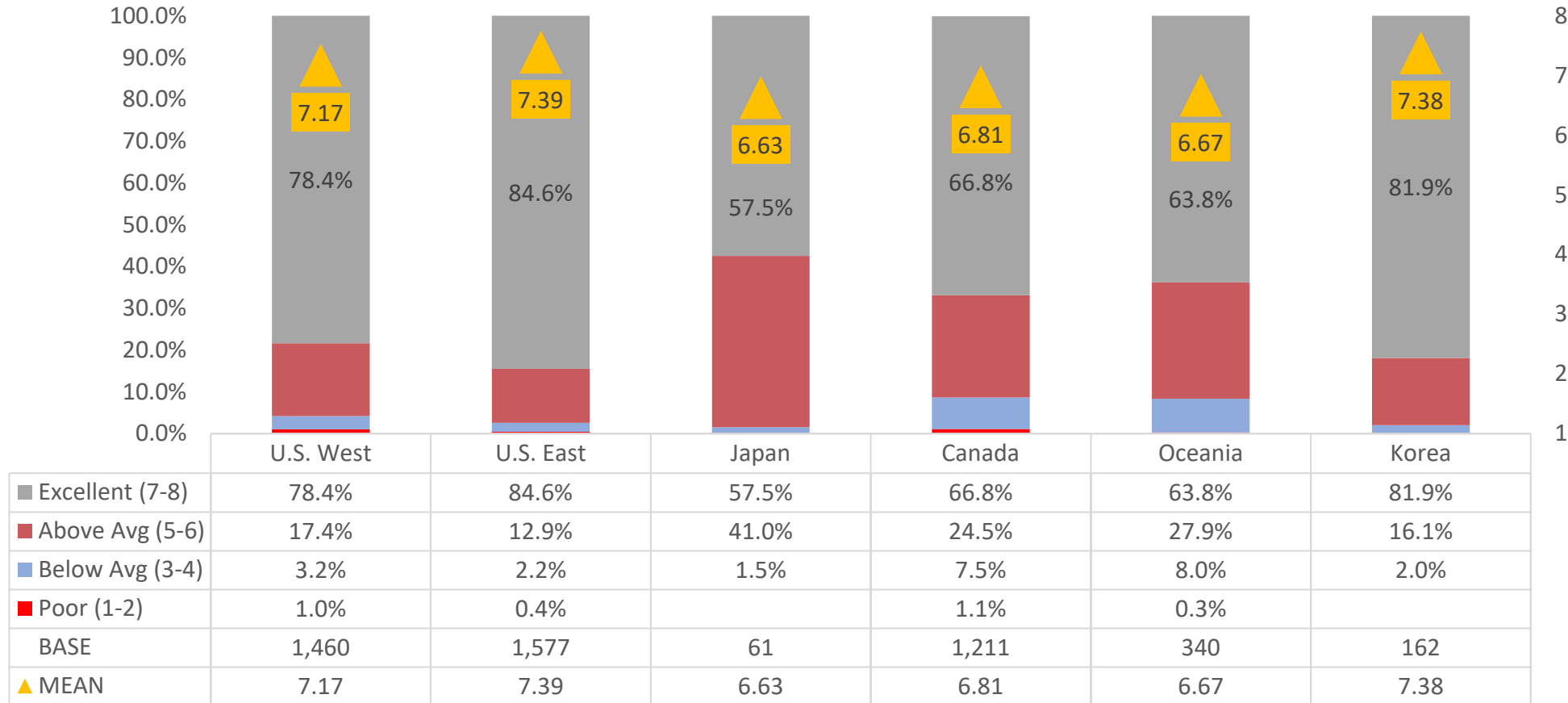
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	78.4%	84.6%	57.5%	66.8%	63.8%	81.9%
■ Above Avg (5-6)	17.4%	12.9%	41.0%	24.5%	27.9%	16.1%
■ Below Avg (3-4)	3.2%	2.2%	1.5%	7.5%	8.0%	2.0%
■ Poor (1-2)	1.0%	0.4%		1.1%	0.3%	
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	7.17	7.39	6.63	6.81	6.67	7.38

Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

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VOLUNTEER/ GIVE-BACK OPPORTUNITIES

8-pt Rating Scale
8=Excellent/ 1=Poor
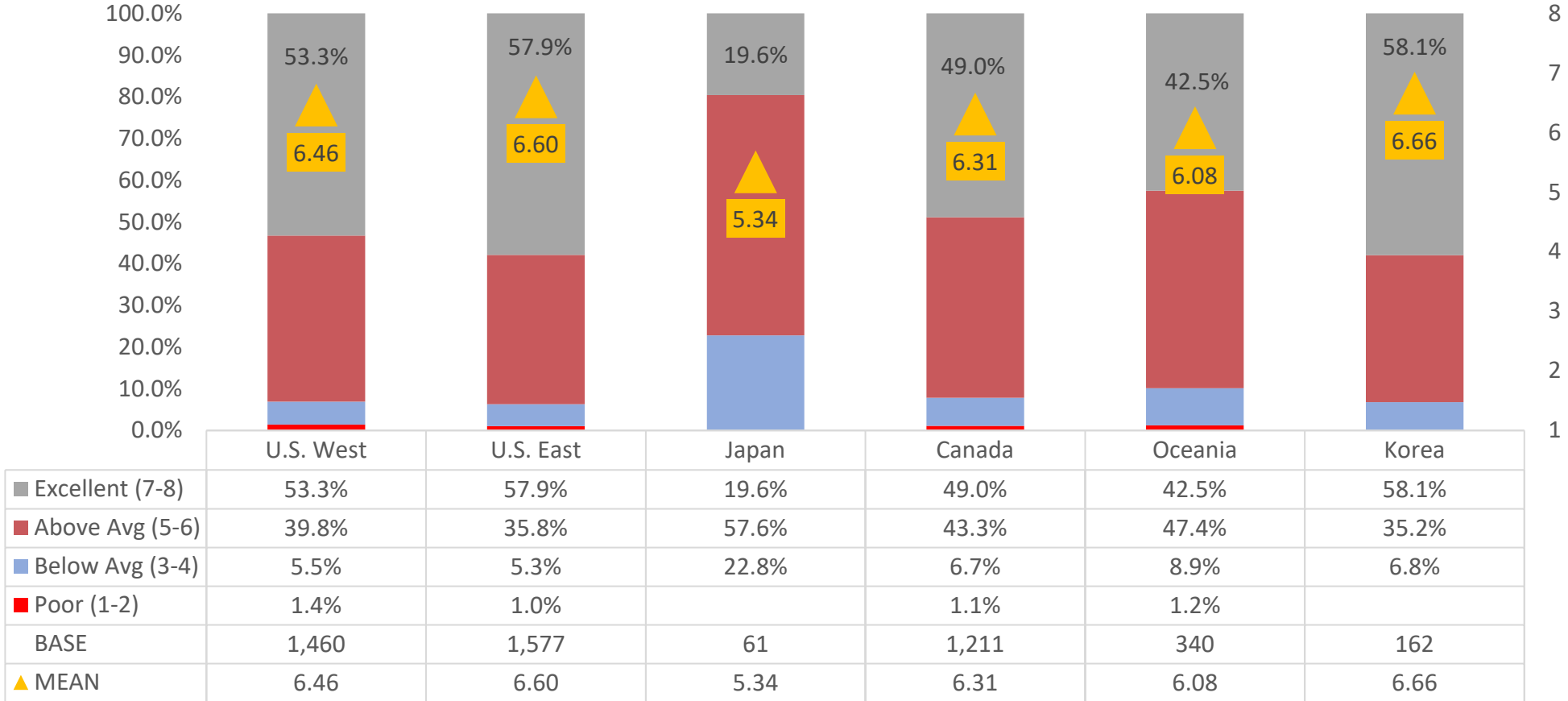
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
■ Excellent (7-8)	53.3%	57.9%	19.6%	49.0%	42.5%	58.1%
■ Above Avg (5-6)	39.8%	35.8%	57.6%	43.3%	47.4%	35.2%
■ Below Avg (3-4)	5.5%	5.3%	22.8%	6.7%	8.9%	6.8%
■ Poor (1-2)	1.4%	1.0%		1.1%	1.2%	
BASE	1,460	1,577	61	1,211	340	162
▲ MEAN	6.46	6.60	5.34	6.31	6.08	6.66

Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

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ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.6%	98.0%	89.2%	98.6%	93.1%	98.8%
On own (self-guided)	85.3%	83.1%	66.9%	83.5%	54.7%	68.3%
Helicopter/ airplane	2.9%	6.8%	0.0%	6.5%	2.7%	13.8%
Boat/ submarine/ whale	21.1%	29.4%	2.3%	24.0%	21.2%	36.9%
Visit towns/communities	55.8%	56.0%	30.0%	59.8%	28.8%	45.0%
Limo/ van/ bus tour	7.4%	13.2%	6.9%	10.4%	24.7%	7.6%
Scenic views/ natural landmark	59.2%	68.1%	31.4%	65.9%	48.0%	58.5%
Movie/ TV/ film location	4.9%	7.5%	3.8%	5.9%	8.9%	26.4%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.4%	96.7%	85.4%	98.0%	93.9%	96.4%
Beach/ sunbathing	87.5%	83.5%	63.1%	88.5%	76.6%	70.4%
Bodyboarding	11.2%	6.2%	0.0%	14.5%	3.8%	6.2%
Standup paddle board	5.7%	4.3%	2.3%	5.8%	7.0%	7.7%
Surfing	6.2%	5.9%	0.0%	9.1%	7.3%	18.0%
Canoeing/ kayak	6.0%	4.8%	0.0%	5.8%	2.4%	7.7%
Swim in the ocean	66.0%	61.6%	22.3%	75.5%	60.2%	52.6%
Snorkeling	40.7%	36.1%	5.4%	51.0%	23.4%	44.9%
Freediving	1.3%	1.5%	0.0%	0.8%	0.9%	3.5%
Windsurf/ Kitesurf	0.1%	0.1%	0.0%	0.4%	0.3%	0.0%
Jet ski/ Parasail	1.2%	1.7%	0.0%	0.7%	1.1%	2.9%
Scuba diving	2.2%	2.2%	1.5%	2.7%	1.2%	1.2%
Fishing	1.8%	2.5%	0.0%	1.9%	0.3%	2.6%
Golf	5.8%	5.8%	6.2%	10.0%	0.9%	1.4%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.4%	96.7%	85.4%	98.0%	93.9%	96.4%
Run/ Jog/ Fitness walk	29.9%	27.0%	30.1%	31.6%	22.9%	20.4%
Cycling	3.5%	3.4%	2.3%	5.5%	2.1%	0.6%
Spa	9.9%	9.9%	9.2%	4.6%	4.6%	5.5%
Hiking	42.6%	48.3%	14.6%	48.3%	20.4%	26.5%
Backpack/ camp	1.7%	1.3%	0.0%	1.3%	0.3%	4.0%
Agritourism	14.0%	15.3%	3.1%	10.3%	6.5%	17.6%
Sport event/ tournament	2.1%	3.3%	1.5%	3.0%	2.3%	0.6%
Park/ botanical garden	35.1%	42.4%	27.7%	41.2%	27.5%	23.5%
Waterpark	1.5%	1.5%	2.3%	1.0%	1.2%	8.9%
Mountain tube/ waterfall rappel	1.0%	1.8%	0.0%	1.7%	0.6%	1.2%
Zip-lining	4.1%	4.1%	1.5%	3.1%	0.8%	1.2%
Skydiving	0.1%	0.6%	2.3%	0.2%	0.0%	4.3%
All terrain vehicle (ATV)	3.1%	4.7%	0.0%	2.9%	4.4%	14.8%
Horseback riding	1.4%	2.1%	0.0%	1.5%	0.3%	7.9%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	99.4%	98.1%	95.4%	98.4%	98.2%	98.0%
Lunch/ sunset/ dinner/ evening cruise	21.9%	27.3%	3.8%	20.7%	15.6%	44.9%
Live music/ stage show	29.3%	33.0%	20.1%	29.3%	19.0%	18.3%
Nightclub/ dancing/ bar/ karaoke	6.5%	7.8%	3.1%	6.1%	7.4%	7.0%
Fine dining	49.7%	49.5%	35.4%	41.9%	30.6%	54.9%
Family restaurant	62.1%	60.9%	23.1%	61.5%	66.4%	33.5%
Fast food	34.8%	35.0%	45.3%	44.4%	48.4%	59.5%
Food truck	42.0%	40.5%	18.5%	43.2%	31.4%	51.5%
Café/ coffee house	52.5%	49.0%	46.2%	54.4%	58.3%	67.7%
Ethnic dining	27.8%	31.1%	9.3%	21.2%	14.2%	22.5%
Farm-to-table cuisine	18.5%	17.3%	15.4%	11.9%	5.0%	0.6%
Prepared own meal	49.0%	39.1%	30.1%	63.7%	24.2%	6.5%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.6%	97.0%	100.0%	97.6%	97.0%	95.8%
Mall/ department store	45.5%	44.4%	72.3%	57.7%	72.3%	72.2%
Designer boutique	17.9%	17.6%	14.6%	18.4%	17.4%	5.9%
Hotel/ resort store	35.7%	40.9%	34.6%	32.6%	29.8%	37.0%
Swap meet/ flea market	17.0%	14.2%	5.4%	13.5%	8.4%	4.3%
Discount/ outlet store	14.3%	17.2%	25.4%	19.9%	40.6%	60.0%
Supermarket	66.1%	54.9%	57.7%	69.3%	44.6%	40.7%
Farmer's market	34.0%	29.8%	17.7%	42.9%	15.8%	12.7%
Convenience store	50.8%	52.3%	50.0%	55.4%	62.9%	49.9%
Duty free store	3.8%	5.3%	6.2%	6.1%	7.0%	39.7%
Hawaiʻi-made products	48.6%	49.2%	23.1%	45.9%	34.3%	23.3%
Local shop/ artisan	61.4%	60.1%	13.8%	61.1%	38.8%	23.4%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	69.1%	79.3%	47.7%	73.0%	69.4%	52.4%
Historic military site	18.4%	31.6%	4.6%	18.1%	35.5%	11.9%
Historic Hawaiian site	30.5%	35.4%	20.0%	32.3%	27.6%	9.6%
Other historical site	13.2%	15.7%	8.5%	13.1%	11.5%	16.1%
Art museum	3.8%	2.9%	1.5%	3.2%	3.8%	5.5%
Art gallery/ exhibition	11.4%	10.1%	0.0%	11.8%	7.5%	1.8%
Luau/ Polynesian show/ hula show	25.5%	39.7%	11.5%	29.0%	23.0%	12.7%
Lesson- ex. ukulele, hula, canoe, lei making	5.1%	5.9%	4.6%	3.0%	2.9%	1.2%
Play/ concert/ theatre	3.4%	2.8%	1.5%	3.1%	2.4%	4.7%
Art/ craft fair	13.6%	10.3%	4.6%	12.7%	4.1%	2.3%
Festival /event	4.2%	5.5%	9.3%	3.8%	4.0%	4.9%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	93.5%	93.4%	94.6%	94.9%	97.8%	94.9%
Airport shuttle	14.6%	14.4%	14.6%	15.3%	29.1%	14.6%
Trolley	3.2%	4.0%	21.5%	4.6%	11.6%	17.4%
Public bus	4.1%	5.4%	26.2%	9.4%	24.7%	14.1%
Tour bus/ tour van	5.8%	14.4%	10.7%	11.7%	24.5%	23.3%
Taxi/ limo	8.5%	9.7%	36.2%	14.8%	36.6%	17.3%
Rental car	73.7%	70.3%	30.7%	72.4%	32.2%	55.3%
Ride share	17.7%	21.0%	26.1%	16.7%	36.7%	18.9%
Car share (i.e. Hui, Turo)	6.3%	5.3%	1.5%	5.3%	3.6%	2.0%
Bicycle rental	2.7%	2.1%	2.3%	2.7%	1.2%	3.2%

Q. During this trip, which of the following activities did you participate in?

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ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	33.5%	29.9%	25.4%	23.0%	14.2%	27.9%
Visit friends/ family	32.0%	27.8%	25.4%	20.7%	12.1%	24.4%
Volunteer non-profit	2.6%	3.0%	0.0%	3.8%	2.6%	3.5%

Q. During this trip, which of the following activities did you participate in?

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RESEARCH

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

STR Q4 2022 HOTEL PERFORMANCE FORECAST

State of Hawai'i STR Hotel Performance Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2019	80.8%	0.6%	▲	$ 282.46	2.5%	▲	$ 228.30	3.2%	▲
2020	26.7%	-54.1%	▼	$ 267.03	-5.5%	▼	$ 71.41	-68.7%	▼
2021	55.4%	28.7%	▲	$ 329.89	23.5%	▲	$ 182.86	156.1%	▲
2022	73.6%	16.1%	▲	$ 371.21	12.4%	▲	$ 273.27	43.9%	▲
2023F	77.0%	3.4%	▲	$ 392.61	5.8%	▲	$ 302.44	10.7%	▲

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O'ahu STR Hotel Performance Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2019	84.2%	0.4%	▲	$ 240.40	1.9%	▲	$ 202.50	2.4%	▲
2020	39.3%	-45.0%	▼	$ 215.44	-10.4%	▼	$ 84.59	-58.2%	▼
2021	55.5%	16.3%	▲	$ 224.91	4.4%	▲	$ 124.88	47.6%	▲
2022	75.4%	19.8%	▲	$ 267.77	18.9%	▲	$ 201.79	61.3%	▲
2023F	79.5%	4.2%	▲	$ 280.82	4.9%	▲	$ 223.31	10.7%	▲

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Maui County STR Hotel Performance Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2019	77.7%	1.8%	▲	$ 401.63	3.6%	▲	$ 312.06	6.1%	▲
2020	25.2%	-52.5%	▼	$ 410.26	2.1%	▲	$ 103.31	-66.9%	▼
2021	60.2%	35.0%	▲	$ 539.49	31.5%	▲	$ 324.87	214.5%	▲
2022	67.6%	7.3%	▲	$ 606.92	12.3%	▲	$ 410.12	25.9%	▲
2023F	70.8%	3.2%	▲	$ 628.11	3.5%	▲	$ 444.51	8.4%	▲

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Hawai‘i Island STR Hotel Performance Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2019	77.5%	2.0%	▲	$ 256.54	3.0%	▲	$ 198.81	5.7%	▲
2020	28.6%	-48.9%	▼	$ 247.07	-3.7%	▼	$ 70.57	-64.5%	▼
2021	58.8%	30.2%	▲	$ 345.47	39.8%	▲	$ 203.00	187.7%	▲
2022	74.9%	14.4%	▲	$ 400.10	15.8%	▲	$ 299.71	43.4%	▲
2023F	76.6%	1.7%	▲	$ 416.75	4.2%	▲	$ 319.40	6.6%	▲

February 23, 2023

Kauaʻi STR Hotel Performance Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct. Point Change		$	% Change		$	% Change	
2019	73.0%	-4.1%	▼	$ 281.86	-1.9%	▼	$ 205.70	-7.1%	▼
2020	27.4%	-45.6%	▼	$ 260.18	-7.7%	▼	$ 71.23	-65.4%	▼
2021	51.7%	24.3%	▲	$ 315.93	21.4%	▲	$ 163.34	129.3%	▲
2022	77.7%	20.4%	▲	$ 398.08	26.1%	▲	$ 309.13	71.0%	▲
2023F	79.6%	2.0%	▲	$ 417.51	4.9%	▲	$ 332.54	7.6%	▲

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