

# 2023 Spring Tourism Update

## *Global Tourism Update and Hawai'i Outlook*

April 12, 2023

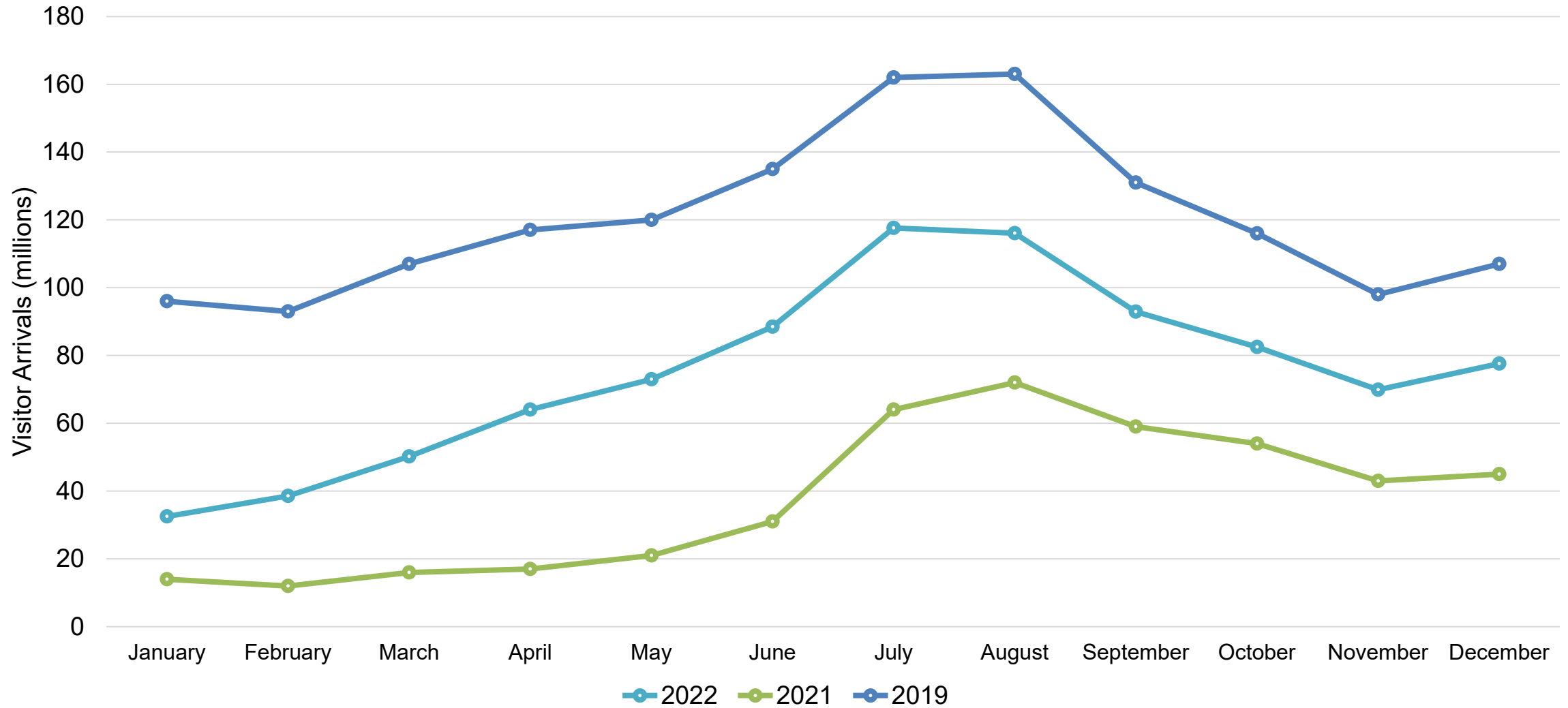
Jennifer Chun

Director of Tourism Research

HAWAII TOURISM  
AUTHORITY

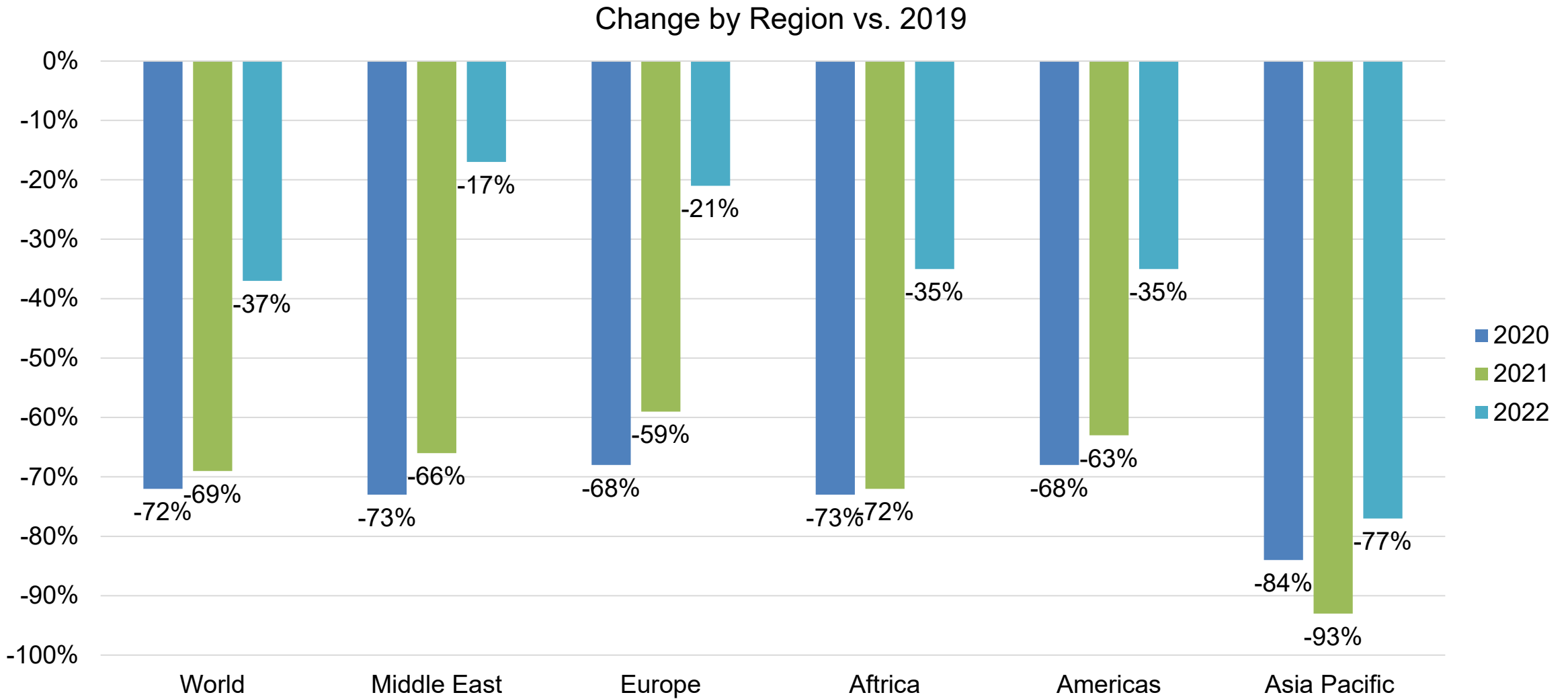
The logo for the Department of Business, Economic Development & Tourism (DBEDT) features a stylized blue wave icon to the left of the acronym 'DBEDT' in a bold, white, sans-serif font. Below the acronym, the full name of the department is written in a smaller, white, sans-serif font.  
**DBEDT**  
STATE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

# UNWTO International Tourism Arrivals



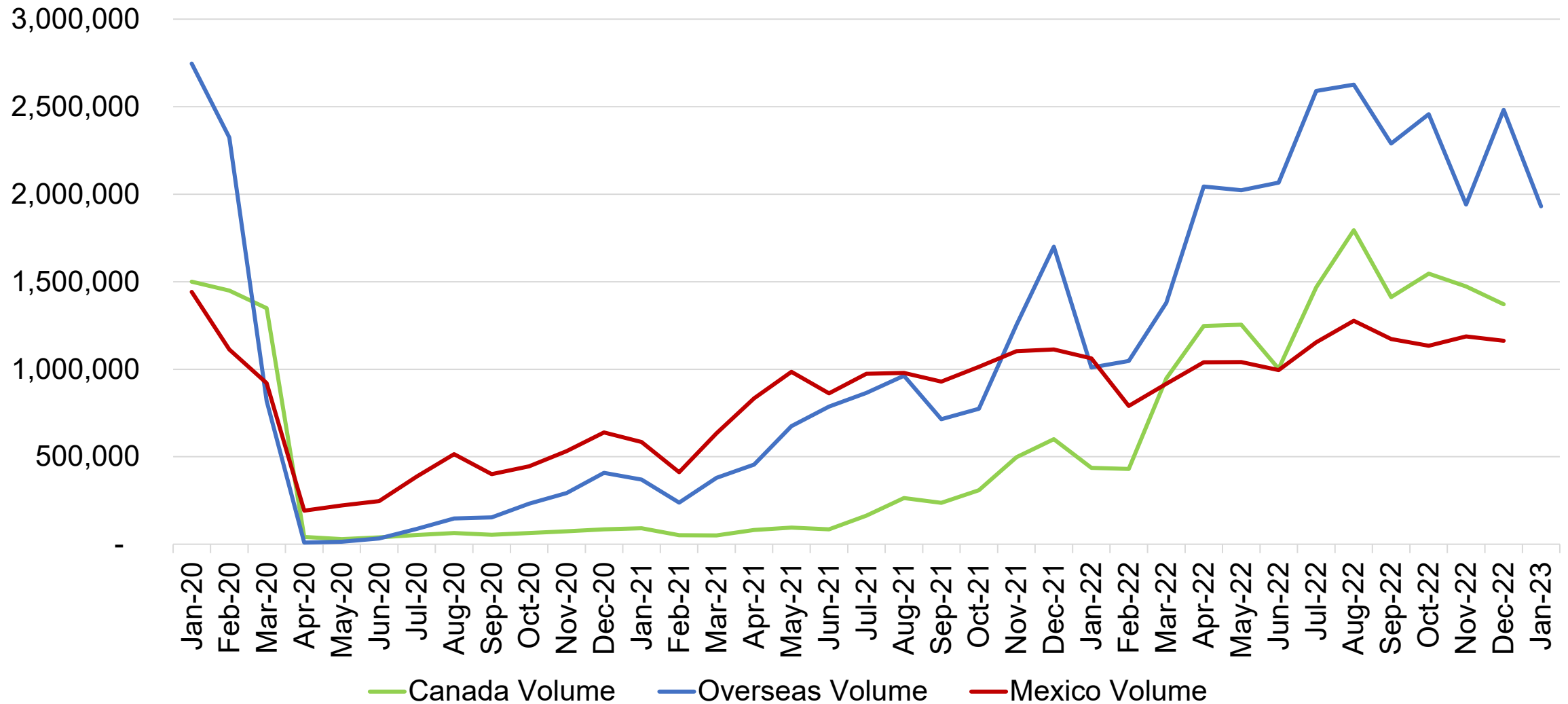
Source: UN World Tourism Organization

# UNWTO International Tourism Arrivals



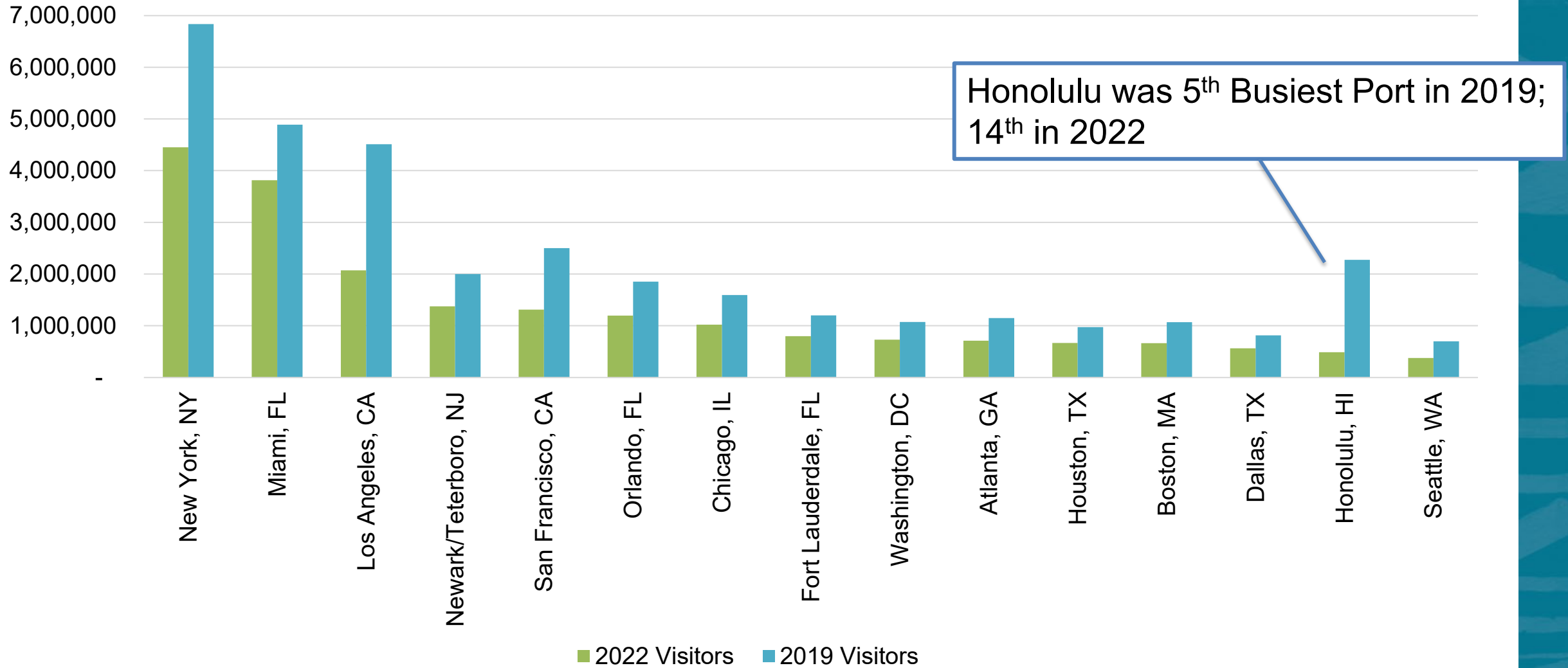
Source: UN World Tourism Organization

# International Arrivals to the U.S.



Source: International Trade Administration

# Visitor Counts by Port of Entry – 2019 vs 2022



Source: International Trade Administration

# Hawai'i Tourism at a Glance

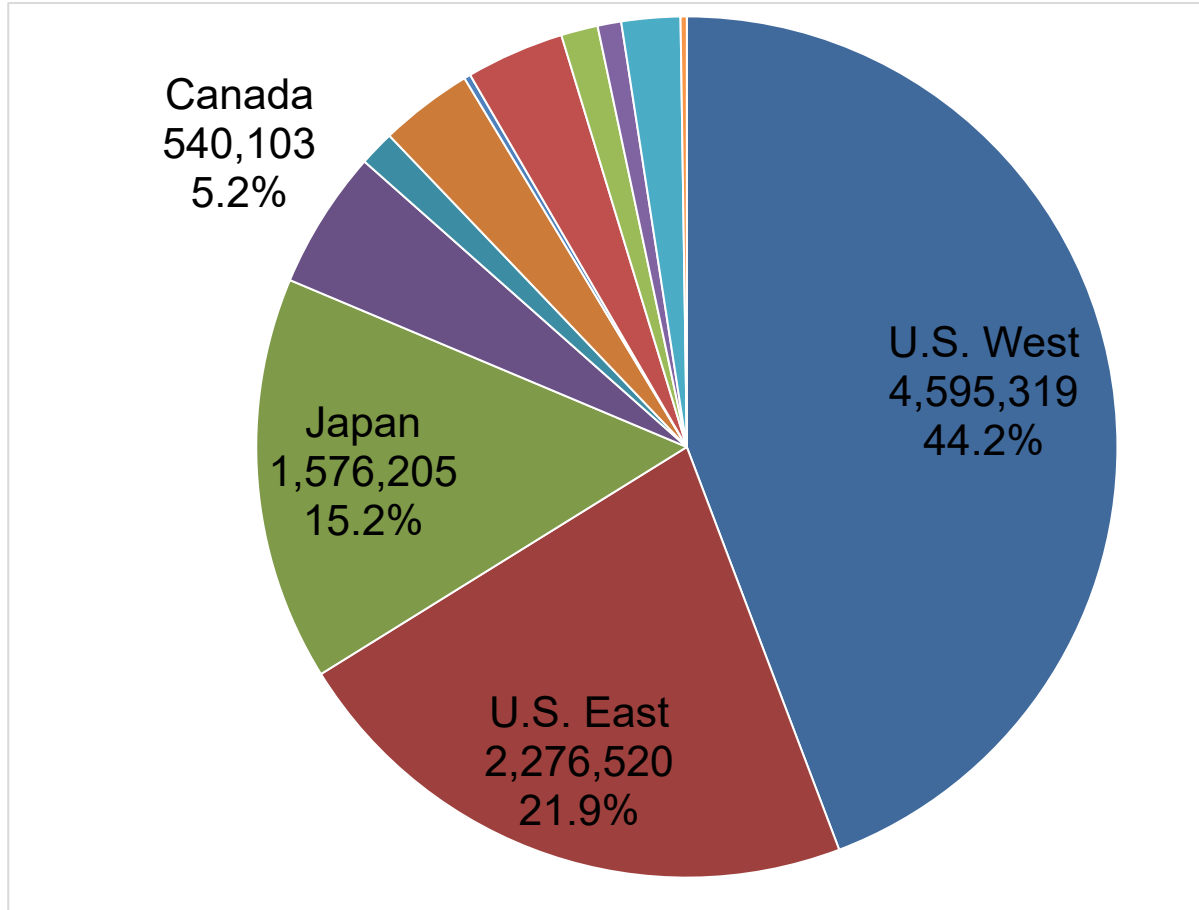
	2013	2014	2015	2016	2017R	2018	2019	2020	2021	2022P <sup>1</sup>
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$17.84B (+1.1%)	\$5.16B <sup>2</sup> (-71.1%)	\$13.15B (+154.8%)	\$19.32B (+46.8%)
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8)	\$2.07B (+0.4%)	\$0.6B <sup>2</sup> (-70.8%)	\$1.53B (+153.7%)	\$2.24B (+46.0%)
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	217,000 (+0.9%)	63,000 <sup>2</sup> (-71%)	160,000 (+154.1%)	197,000 (+23.1%)
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	10.39M (+5.0%)	2.71M (-73.9%)	6.78M (+150.3%)	9.25M (+36.4%)
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	13.62M (+2.9%)	5.32M (-60.9%)	10.74M (+101.8%)	12.75M (+18.7%)

<sup>1</sup> 2022 data are preliminary

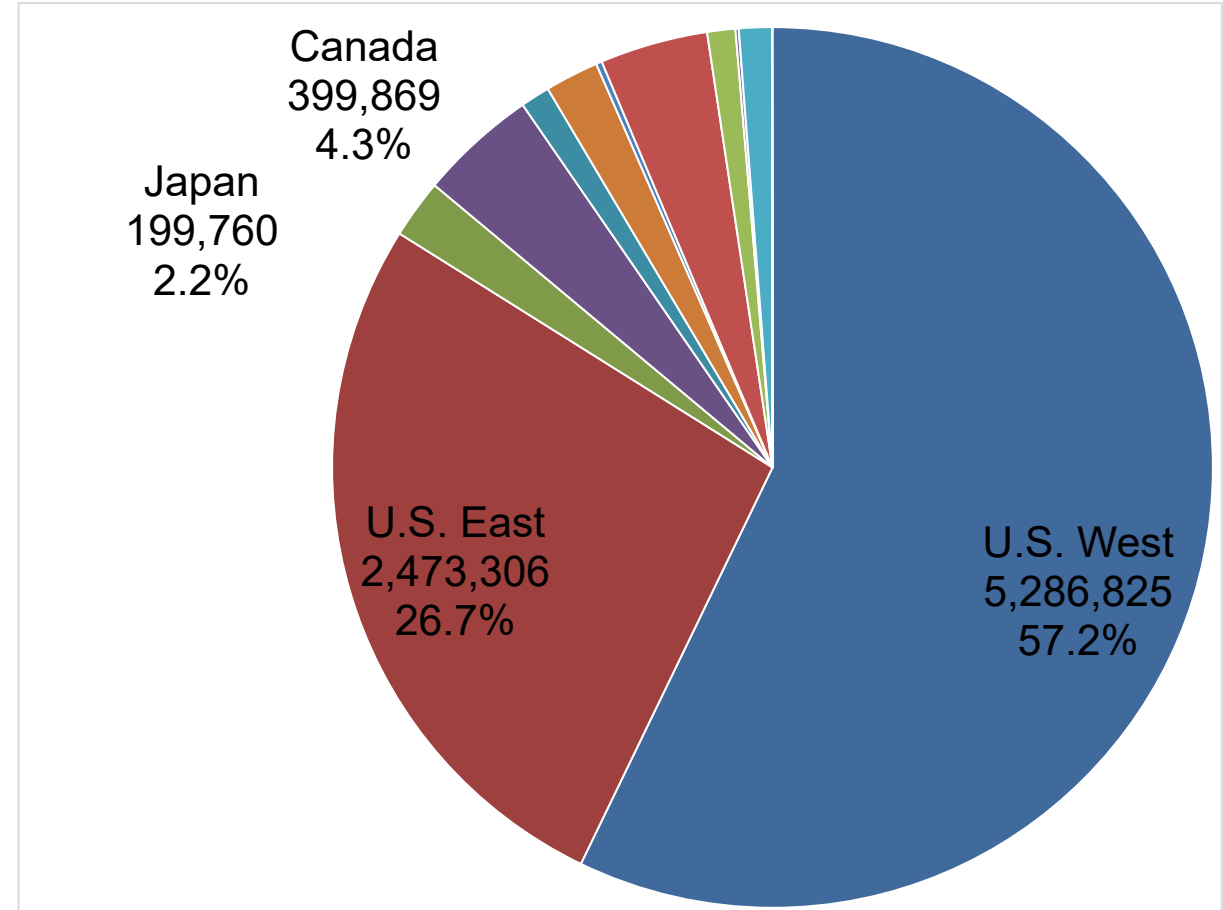
<sup>2</sup> 2020 expenditures were estimated by DBEDT. 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia,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

# Visitor Arrival Mix 2022P vs 2019

2019



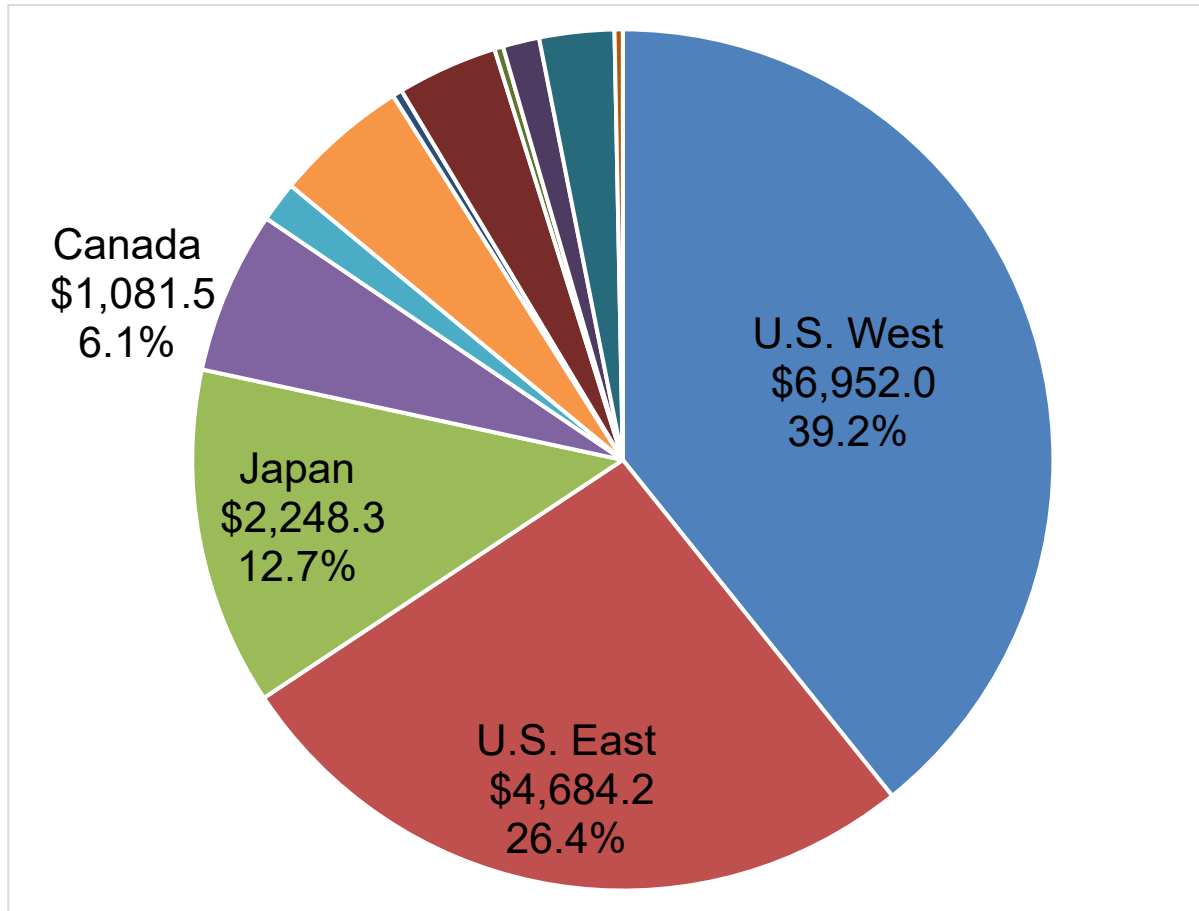
2022P



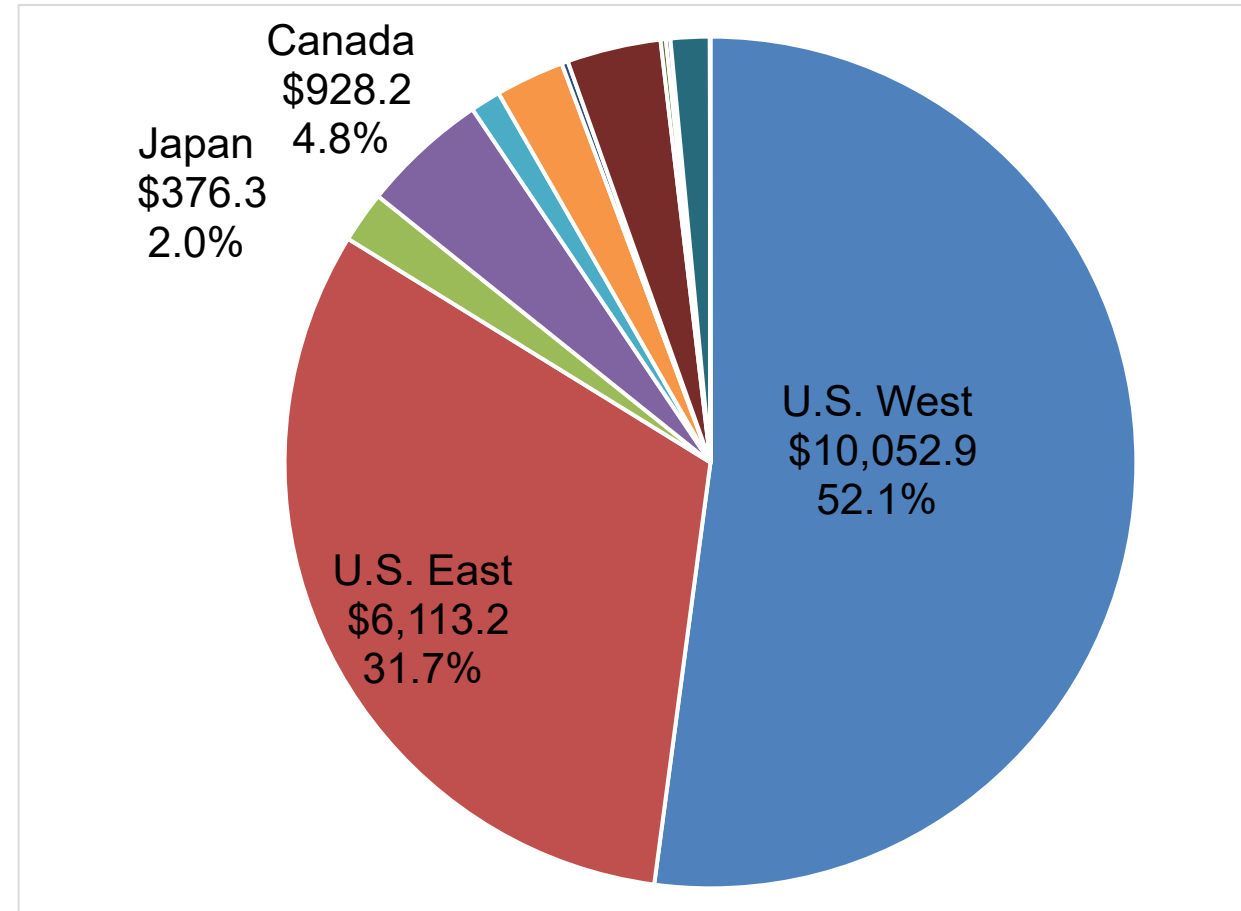
Note: 2022 figures are preliminary.

# Visitor Spending Mix 2022P vs 2019

2019



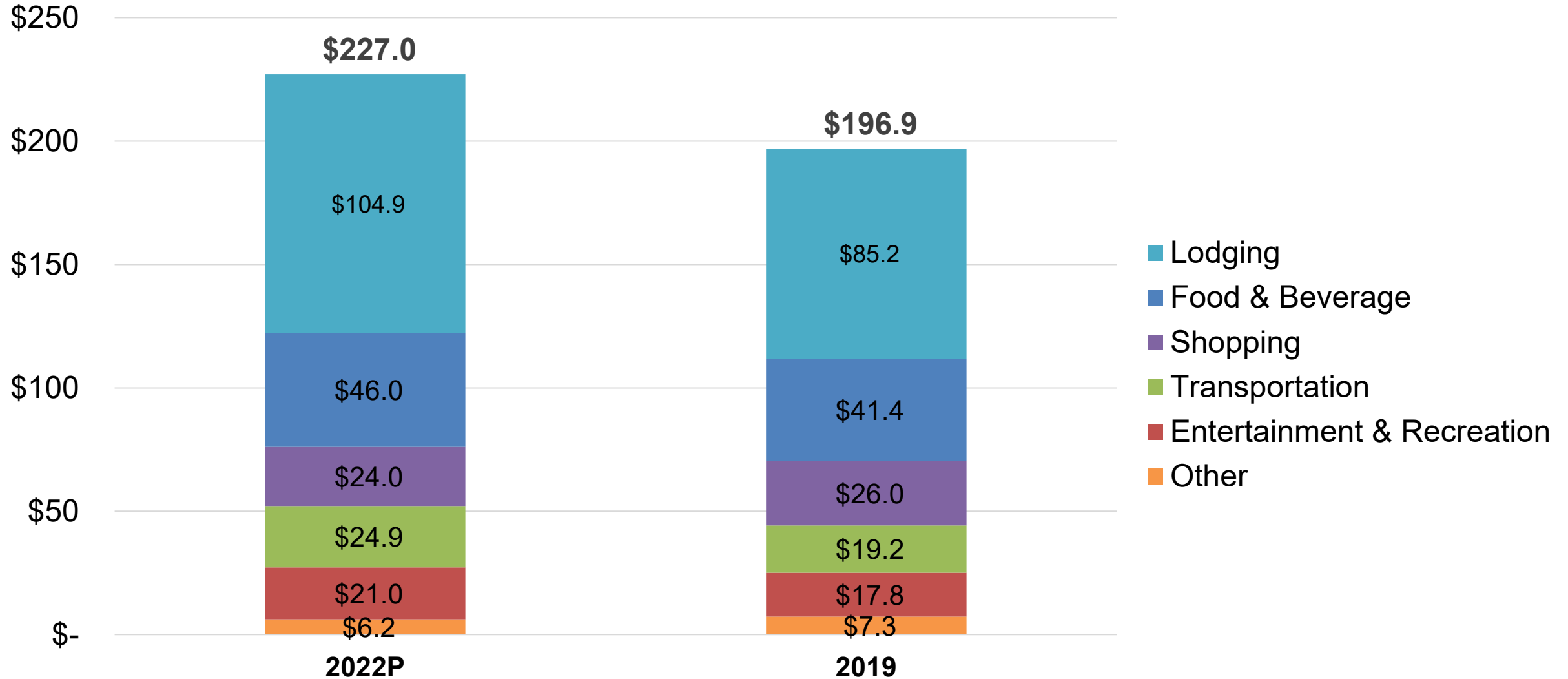
2022P



Note: 2022 figures are preliminary.

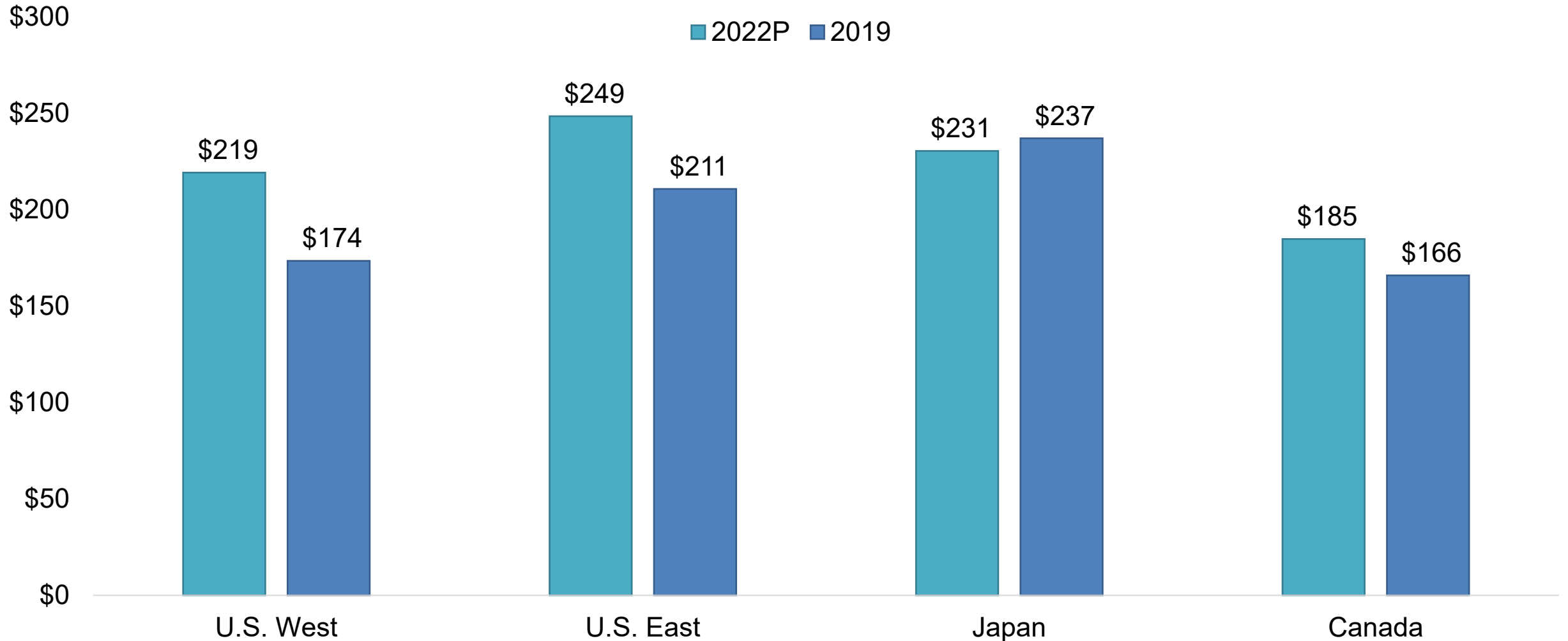


# Spending by Category 2022P vs 2019



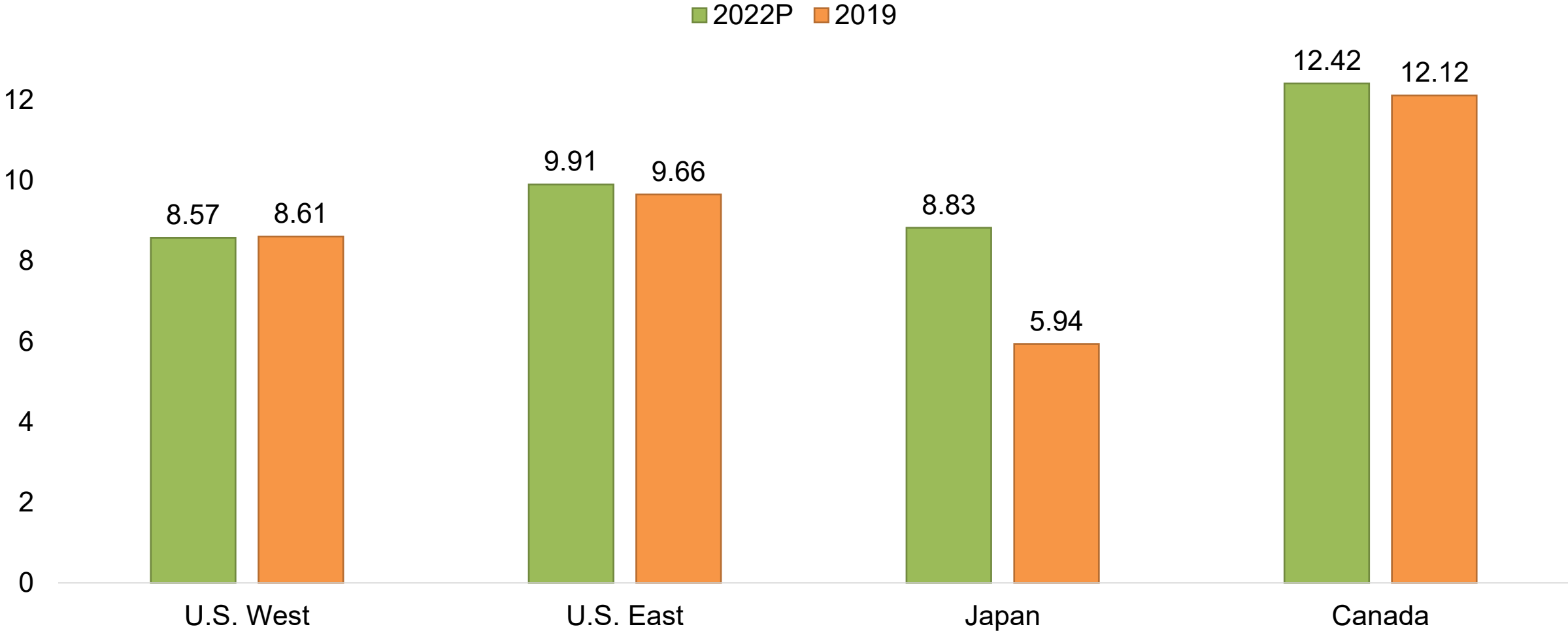
Note: 2022 figures are preliminary.

# Personal Daily Spending – 2022P vs. 2019



Note: 2022 figures are preliminary.

# Average Length of Stay – 2022P vs. YTD 2019

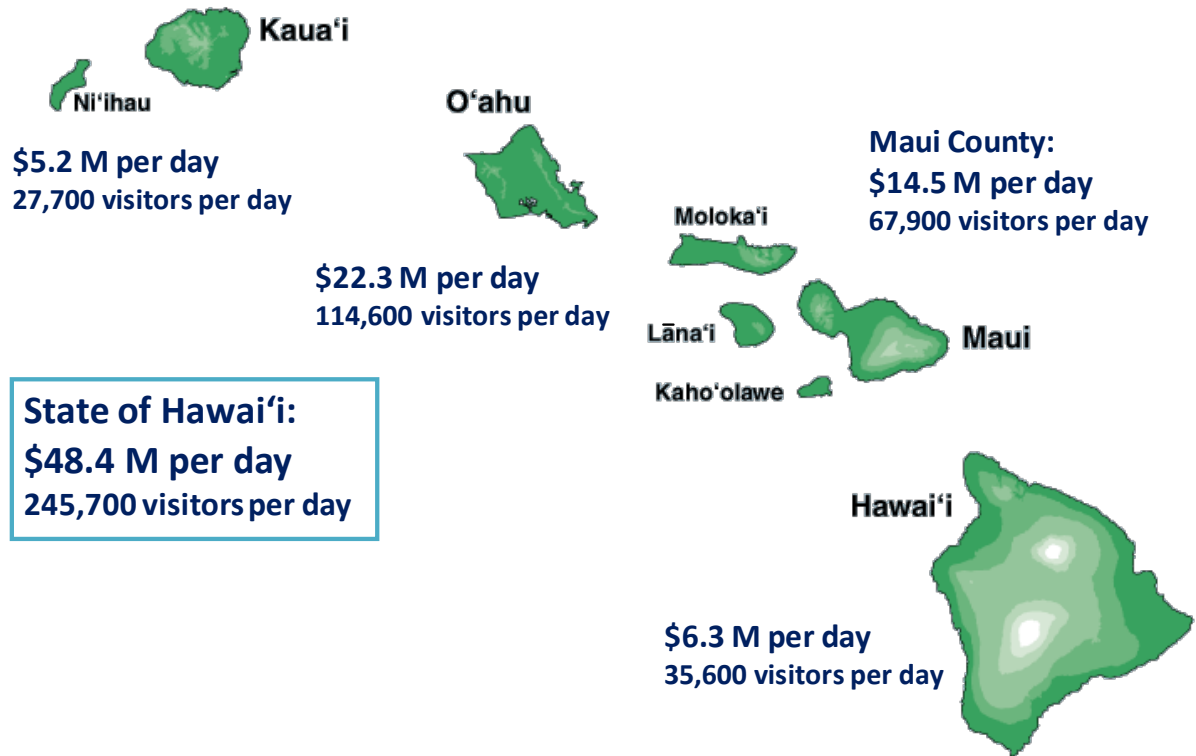


Note: 2022 figures are preliminary.

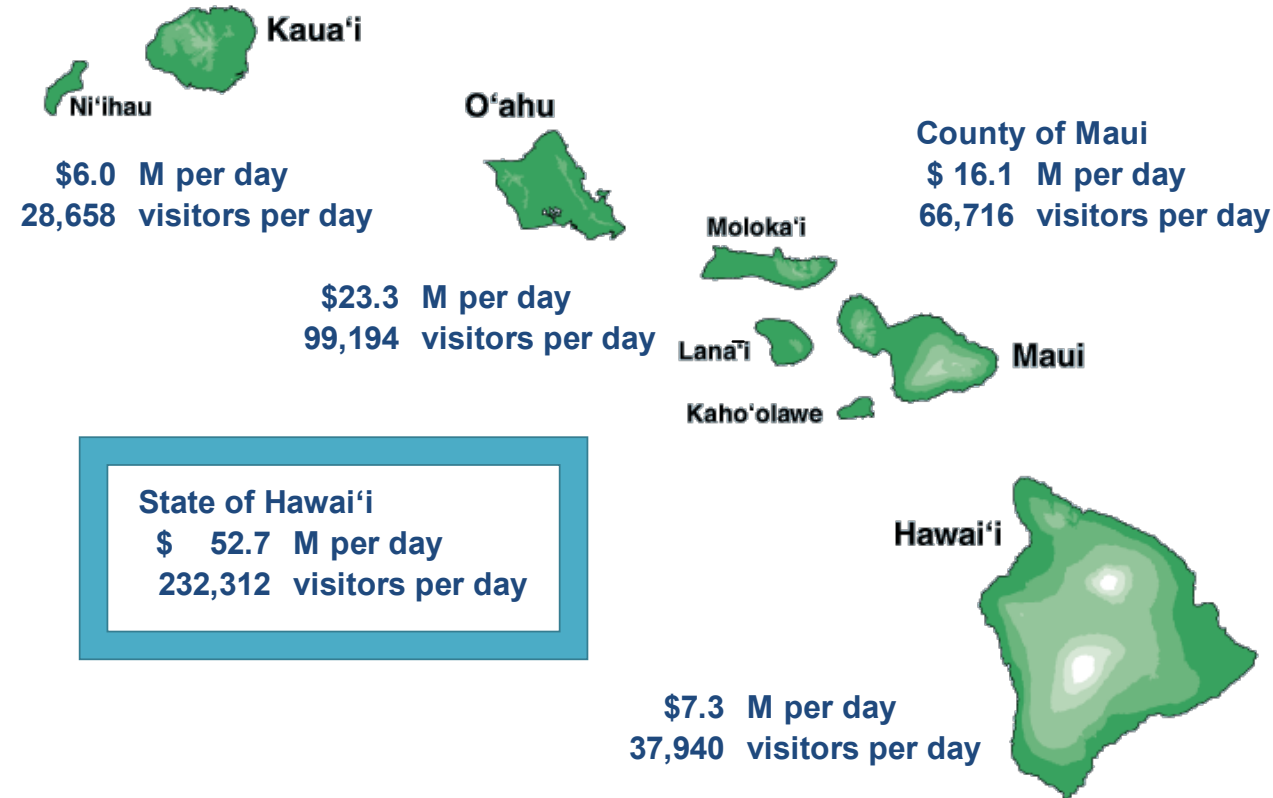
# Tourism Impacts by County – 2022P vs. 2019

**2019**

**2022P**



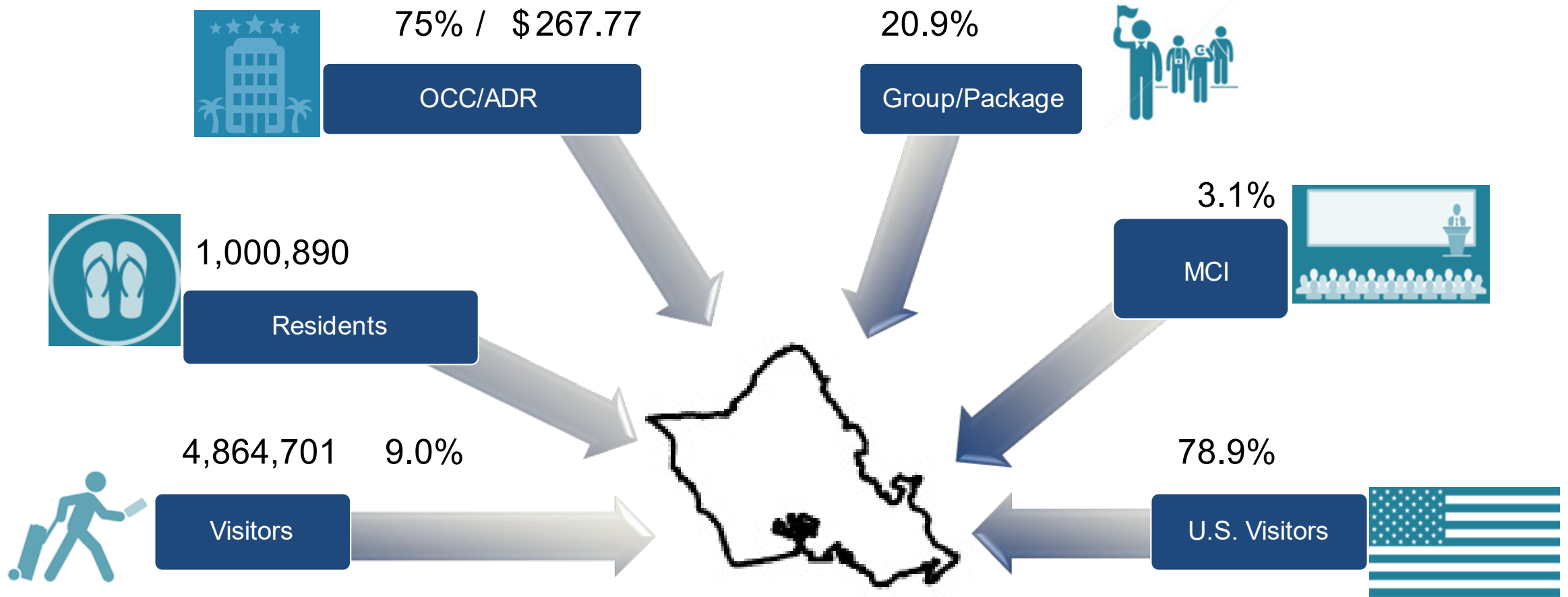
**State of Hawai'i:**  
**\$48.4 M per day**  
**245,700 visitors per day**



**State of Hawai'i**  
**\$ 52.7 M per day**  
**232,312 visitors per day**

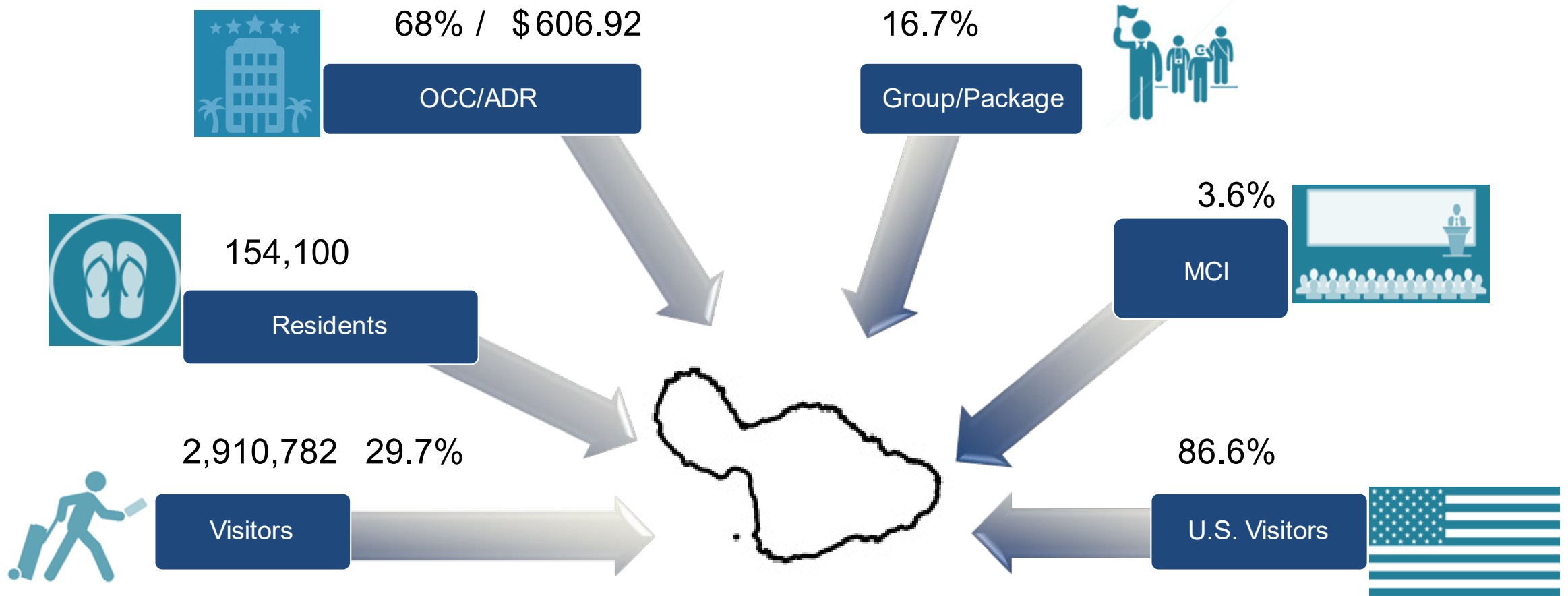
Note: 2022 figures are preliminary.

# O'ahu – 2022P



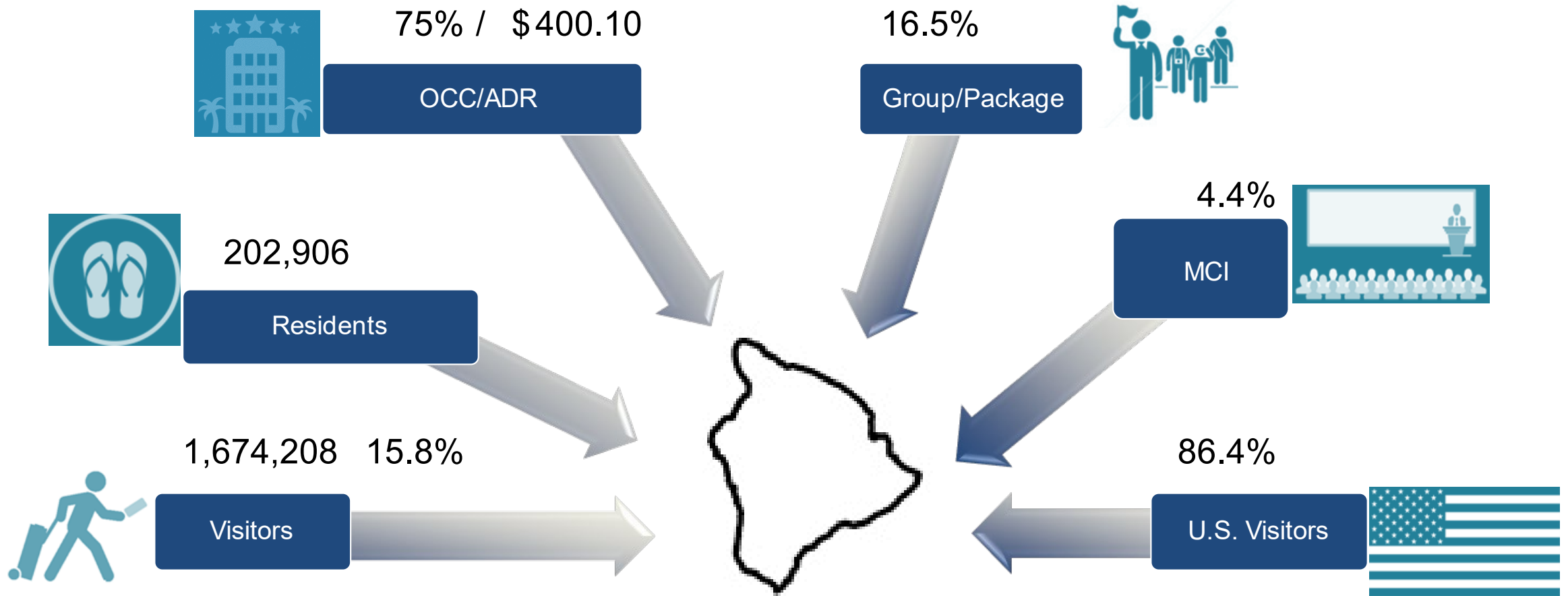
Note: 2022 figures are preliminary.

# Maui – 2022P



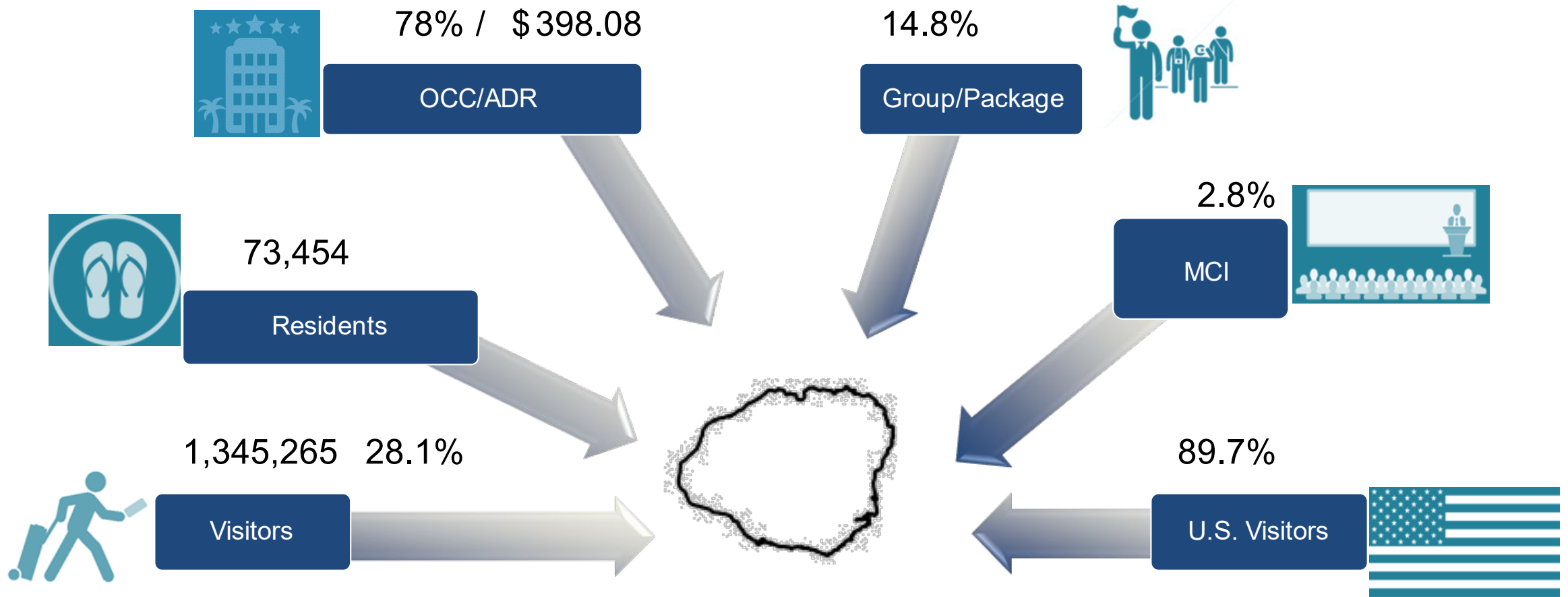
Note: 2022 figures are preliminary.

# Hawai'i Island – 2022P



Note: 2022 figures are preliminary.

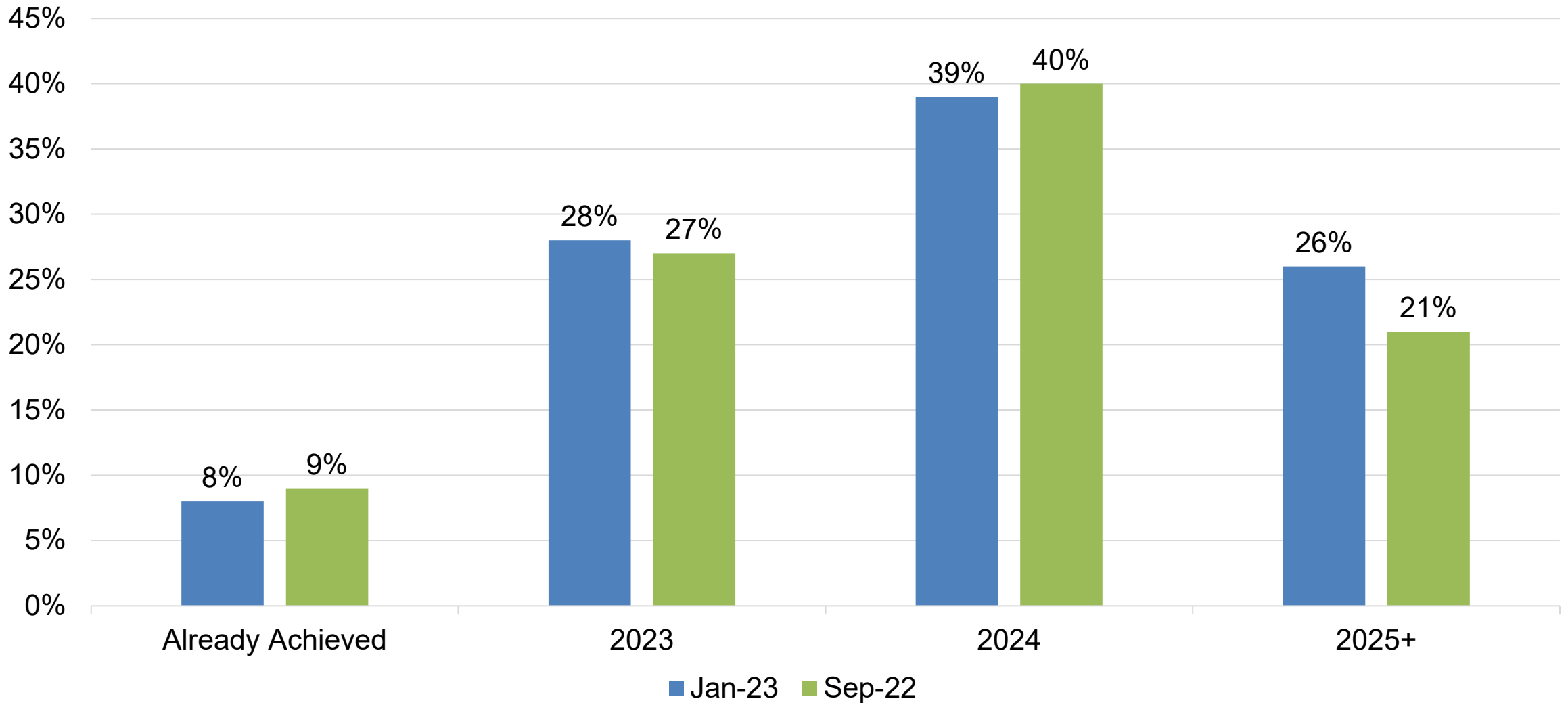
# Kaua'i – 2022P



Note: 2022 figures are preliminary.



# UNWTO Tourism Recovery

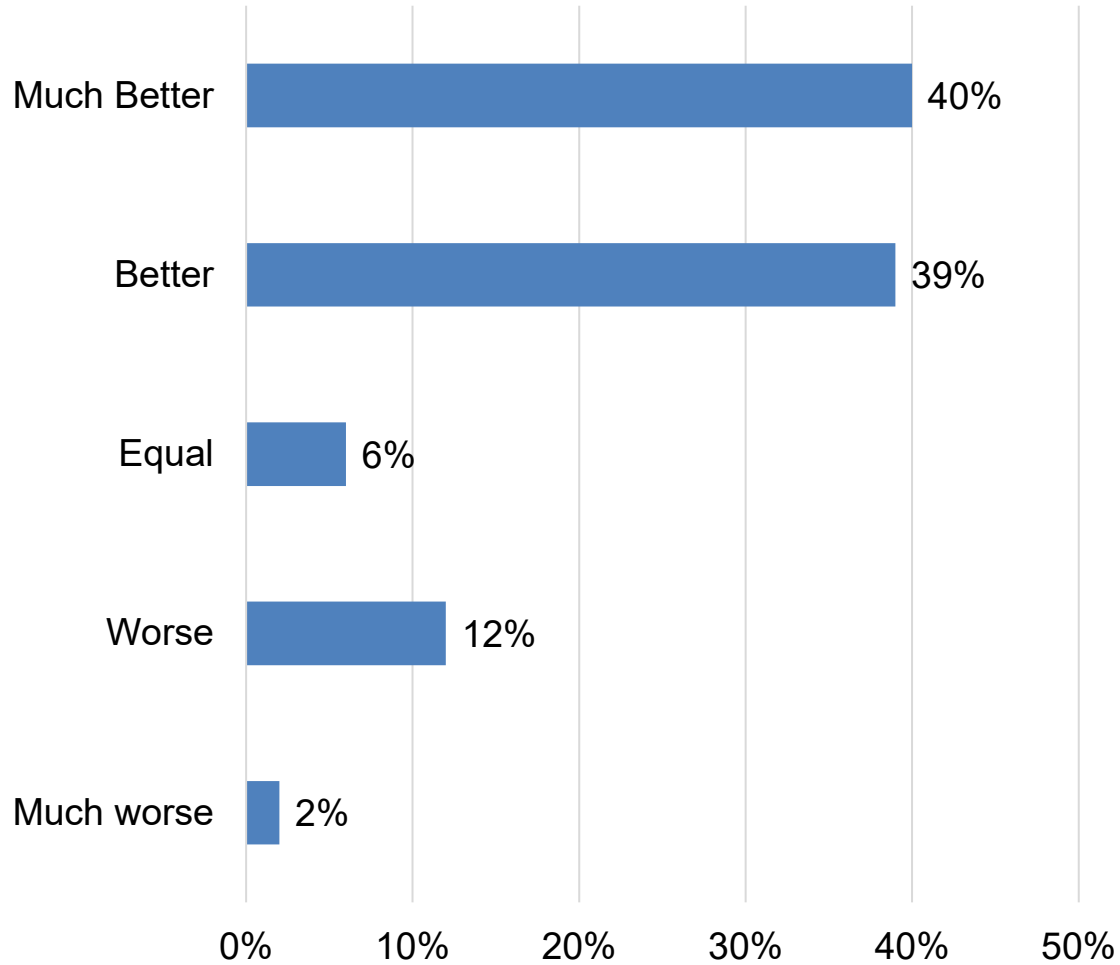


Source: UN World Tourism Organization

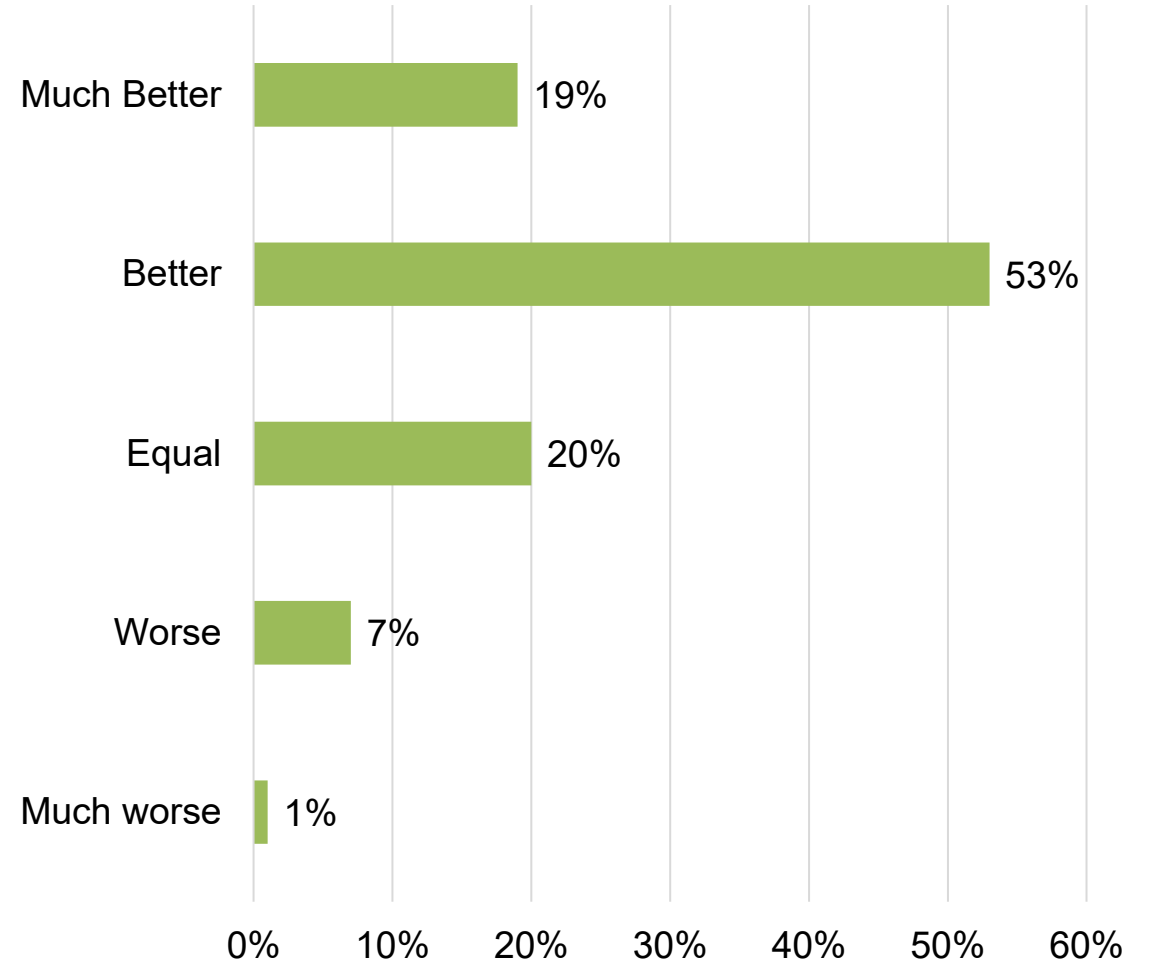
Q: When do you expect international tourism to return to pre-pandemic 2019 levels in your country?

# UNWTO Tourism in Your Country

## Evaluation for 2022

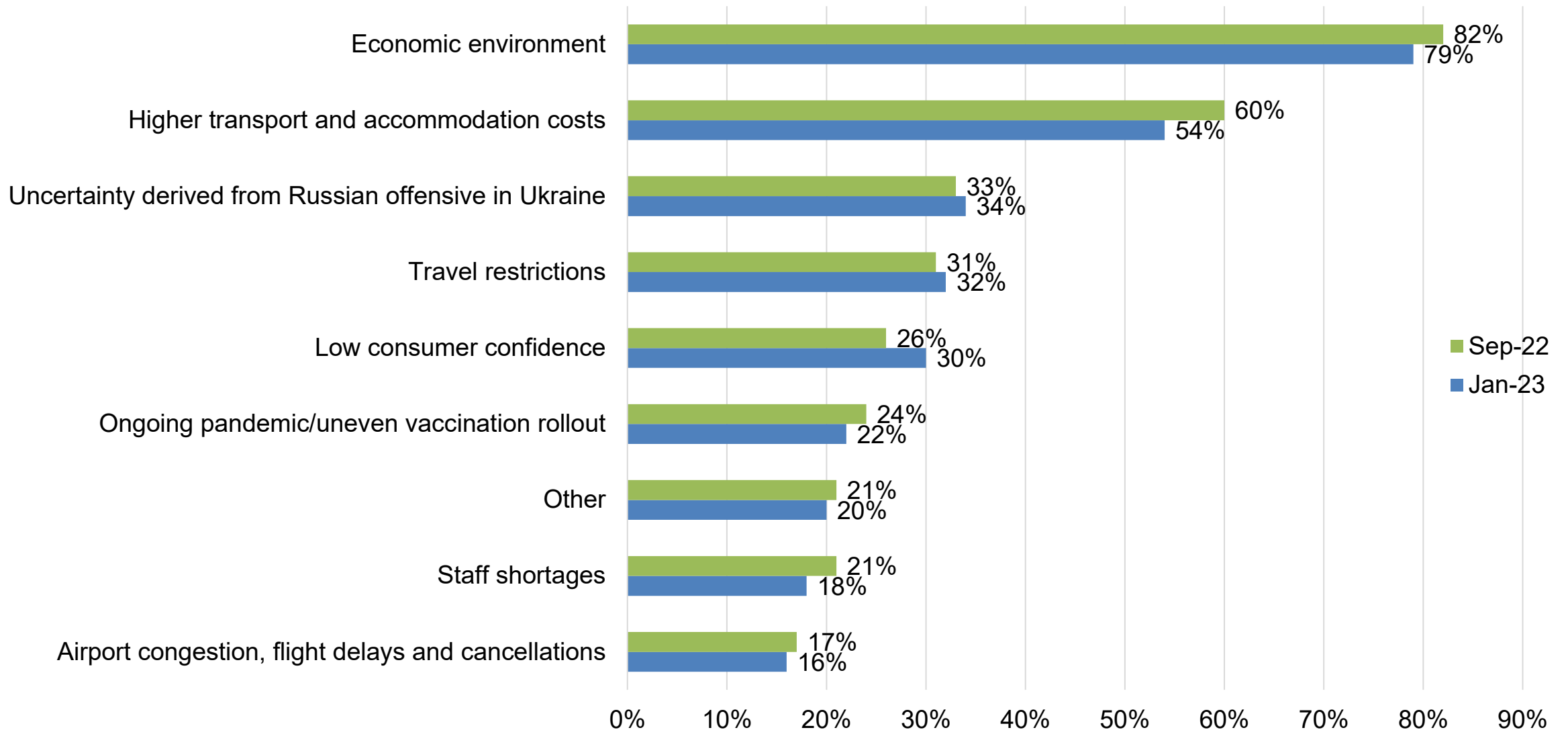


## Prospects for 2023



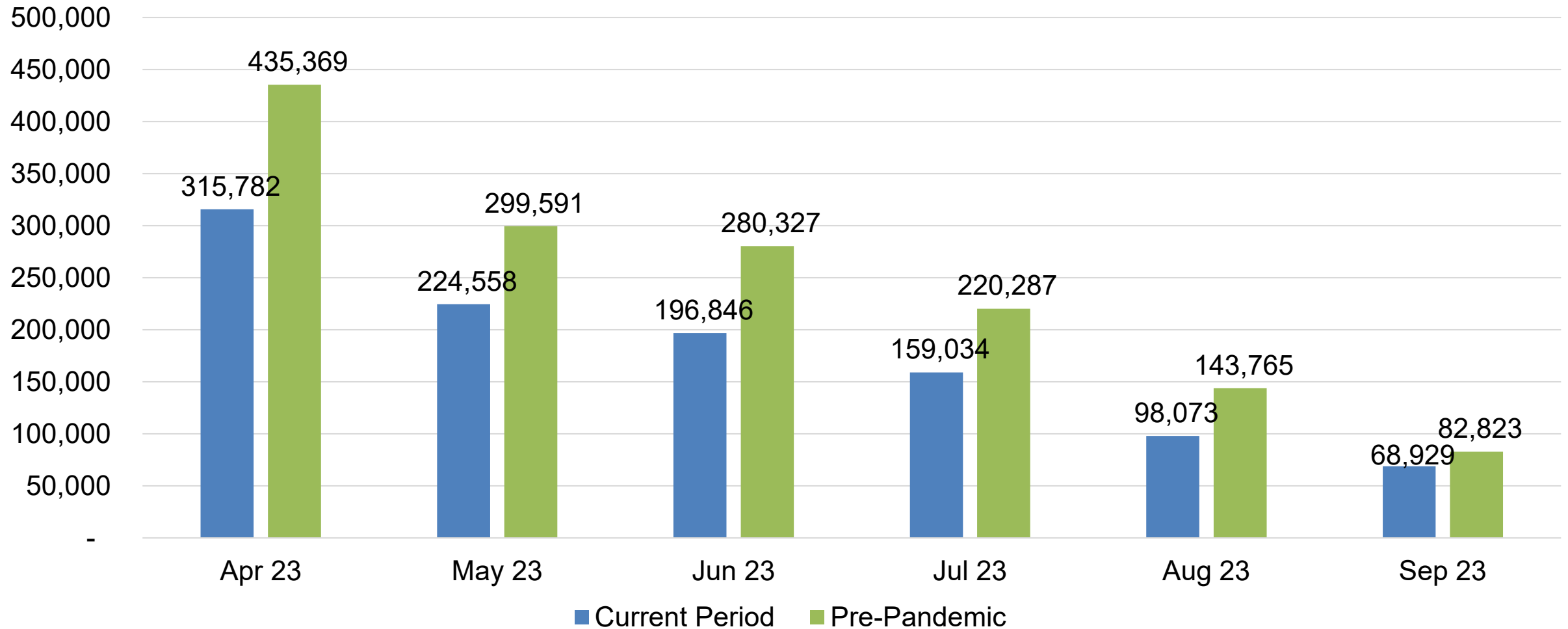
Source: UN World Tourism Organization

# UNWTO Factors Impacting Prospects for 2023



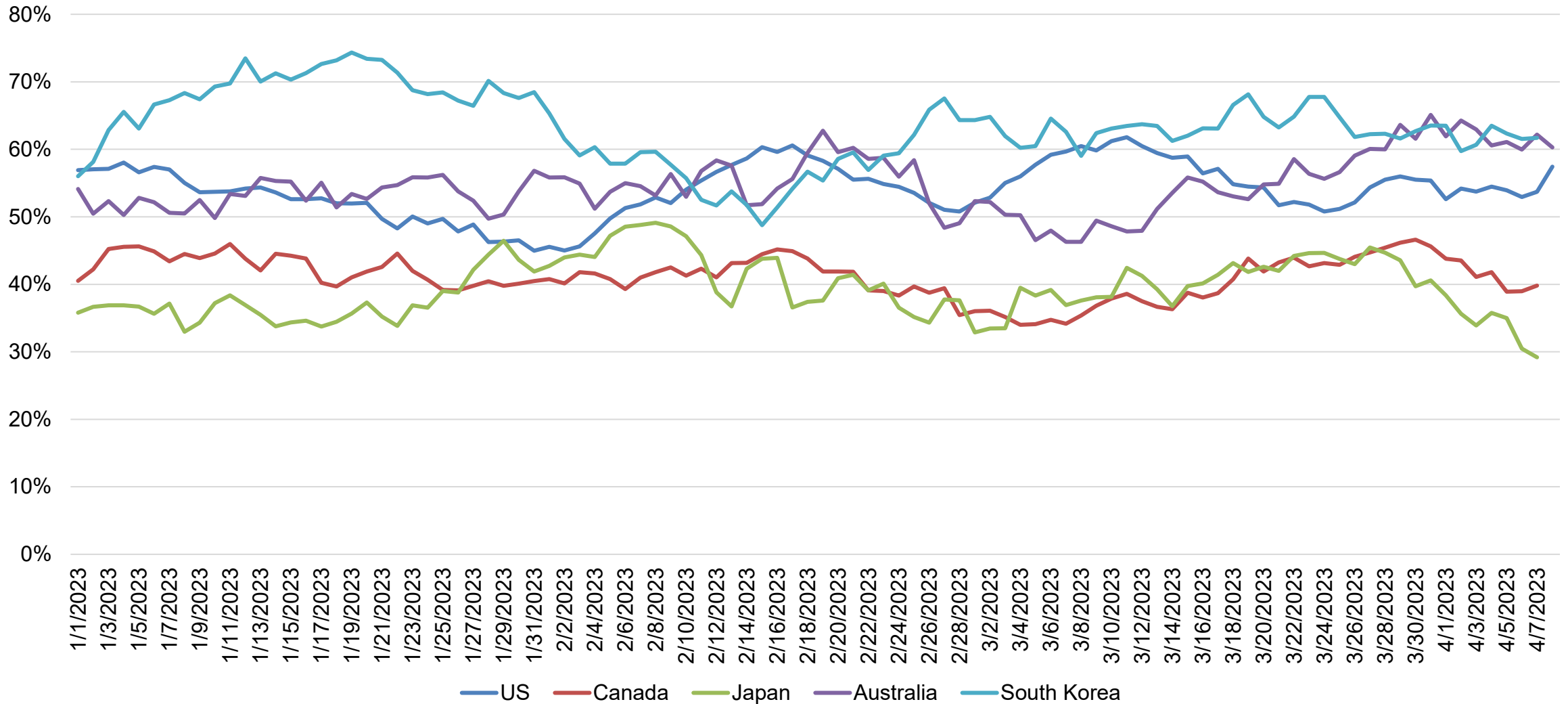
Source: UN World Tourism Organization

# Six Month Outlook: All Origins



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023, as of April 10, 2023

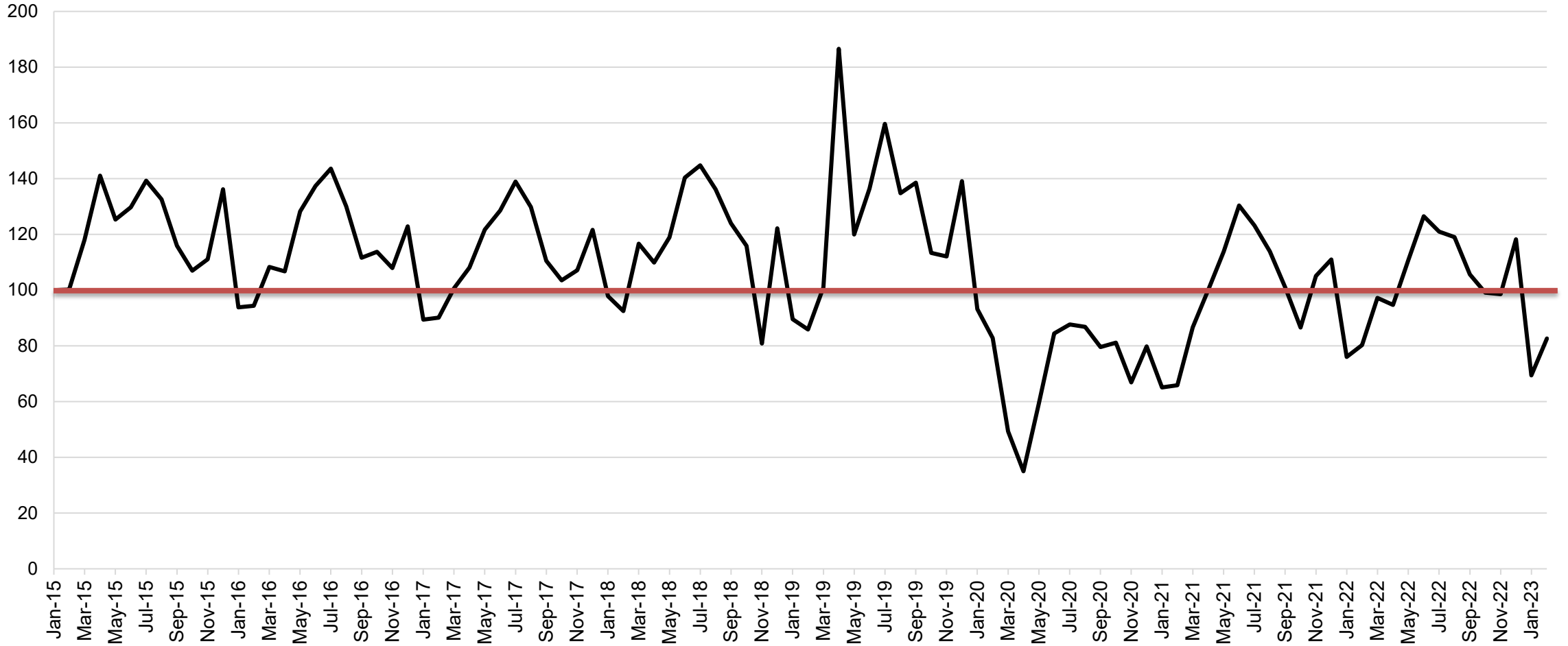
# Consideration for State of Hawai'i Two-Week Moving Average



Source: Vision Insights, as of April 10, 2023

# TravelTrak America: Market Penetration of Travel Index

Index, 2015 = 100



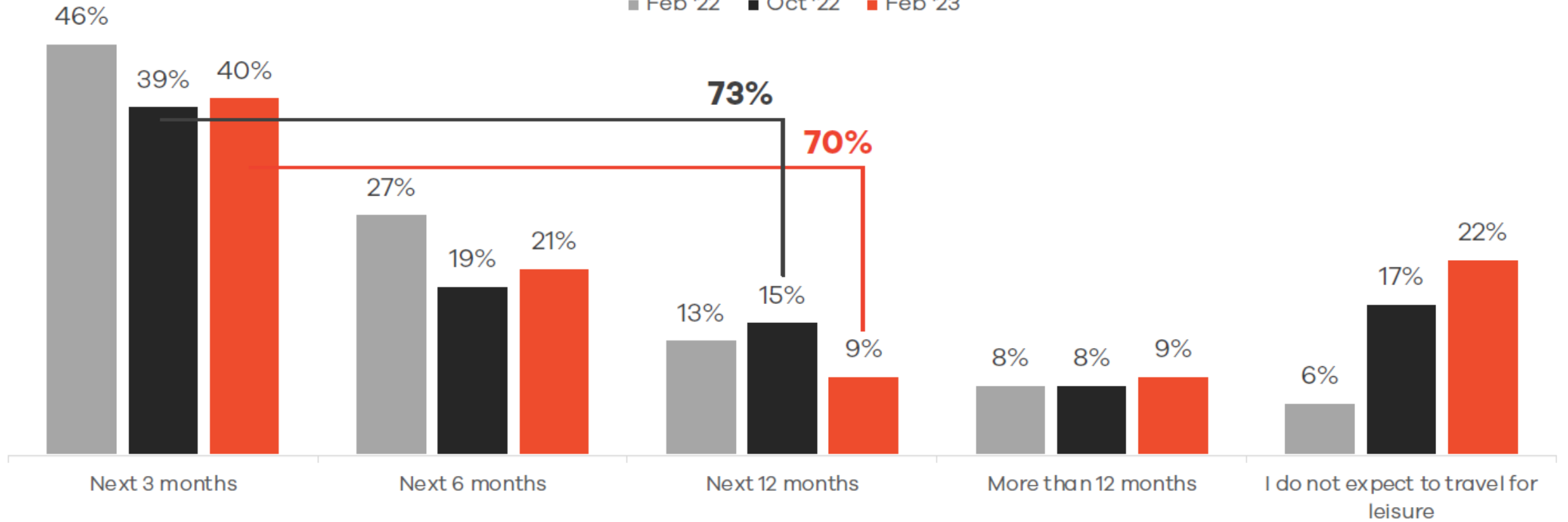
Source: Omnitrak TravelTrak America, February 2023; Sample of 12,000/month

# MMGY: Intended Travel Timing

Sum of Next 6 Months  
 Feb 2022: 73%  
 Feb 2023: 61% ▼

Earliest Expect to Take Next Vacation

■ Feb '22 ■ Oct '22 ■ Feb '23



Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition", Base: U.S. adults (n=4,530)

# MMGY: Destinations Interested in Visiting in Next 2 Years

Rank	Destination	% Interested
1	Island of Hawai'i	56% ▲
1	Honolulu, HI	56%
3	Las Vegas, NV	54%
4	Maui, HI	53%
5	Kaua'i, HI	52%
5	Florida Keys/Key West, FL	52%
7	Orlando, FL	51%
8	New York City, NY	50%
9	San Diego, CA	46%
10	Tampa/St. Petersburg/ Clearwater, FL	45%
10	Miami, FL	45%
10	Lāna'i, HI	45%
10	Los Angeles, CA	45%
14	New Orleans, LA	44%
14	Palm Beach, FL	44%
14	Nashville, TN	44% ▲
17	San Francisco, CA	43%
18	Washington, D.C.	42%
19	Niagara Falls, NY	41%
19	Fort Lauderdale, FL	41% ▼
21	Denver, CO	40%
21	Napa Valley, CA	40%
21	Phoenix/Scottsdale, AZ	40%

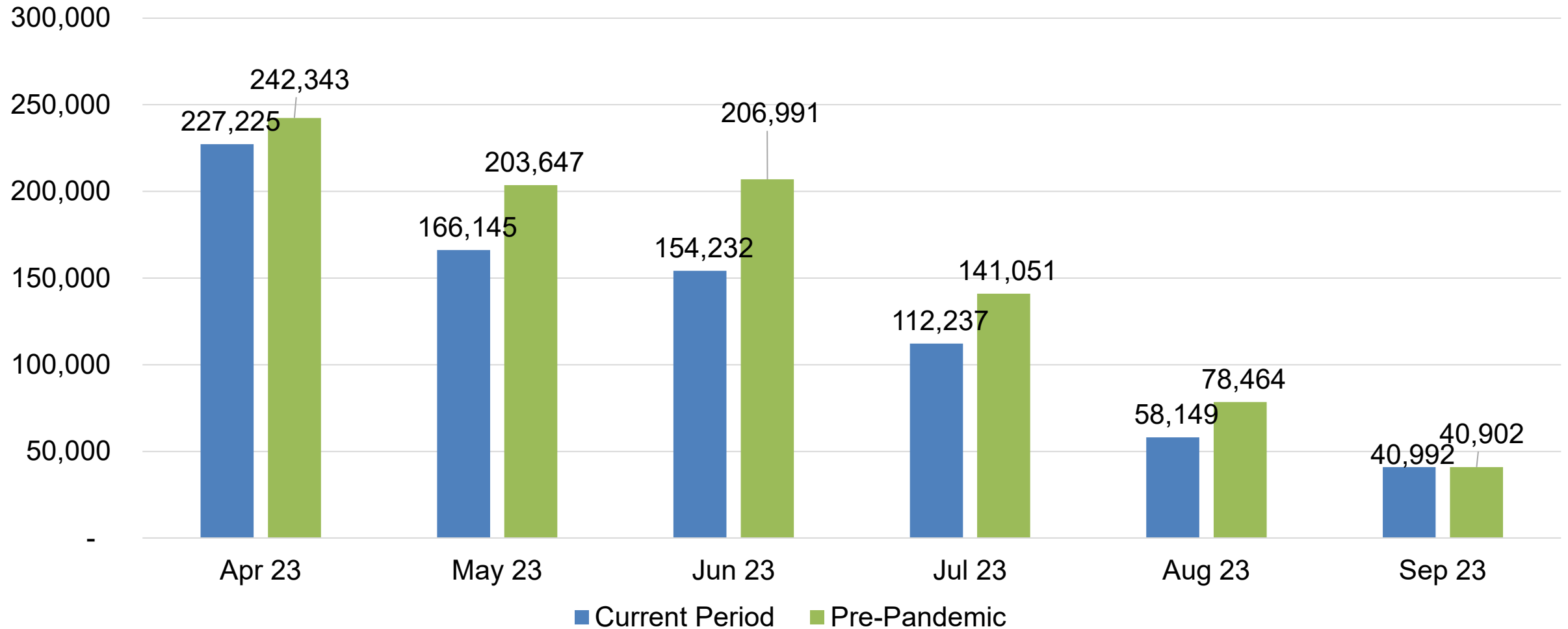
Rank	Destination	% Interested
21	Boston, MA	40% ▲
25	Daytona Beach, FL	39%
25	Panama City Beach, FL	39%
27	Seattle, WA	38%
27	Myrtle Beach, SC	38% ▼
27	Ft. Myers/Sanibel/Captiva, FL	38% ▼
27	St. Augustine, FL	38%
27	San Antonio, TX	38%
32	Palm Springs, CA	37%
32	Charleston, SC	37%
32	Austin, TX	37%
35	Aspen, CO	36%
35	Hilton Head Island, SC	36% ▼
37	Sedona, AZ	35%
37	Dallas, TX	35% ▼
37	Chicago, IL	35%
37	Sonoma County, CA	35%
41	Outer Banks, NC	34% ▼
42	Gatlinburg/Pigeon Forge, TN	33%
42	Atlanta, GA	33% ▼
42	Houston, TX	33%
42	Portland, OR	33%
42	Anaheim, CA	33%

Rank	Destination	% Interested
47	Charlotte, NC	32% ▼
47	Virginia Beach, VA	32%
49	San Jose, CA	31%
49	Asheville, NC	31% ▼
49	Santa Fe, NM	31%
49	Jackson Hole, WY	31%
49	Salt Lake City, UT	31% ▼
49	Vail, CO	31%
55	Philadelphia, PA	30%
56	Raleigh/Durham, NC	28% ▼
56	Park City, UT	28%
58	Corpus Christi, TX	27% ▼
59	Greenville, SC	26%
60	Branson, MO	25% ▼
60	Winston-Salem, NC	25% ▼
62	Wilmington, NC	24% ▼
62	Kansas City, MO	24%
64	St. Louis, MO	23% ▼
64	Ann Arbor, MI	23% ▼
64	Shreveport, LA	23%
64	Detroit, MI	23% ▼
68	Cleveland, OH	22% ▼
68	Minneapolis, MN	22% ▼

Source: MMGY Global's 2023 Portrait of American Travelers® "Spring Edition", Base: Active leisure travelers (n=3,146)

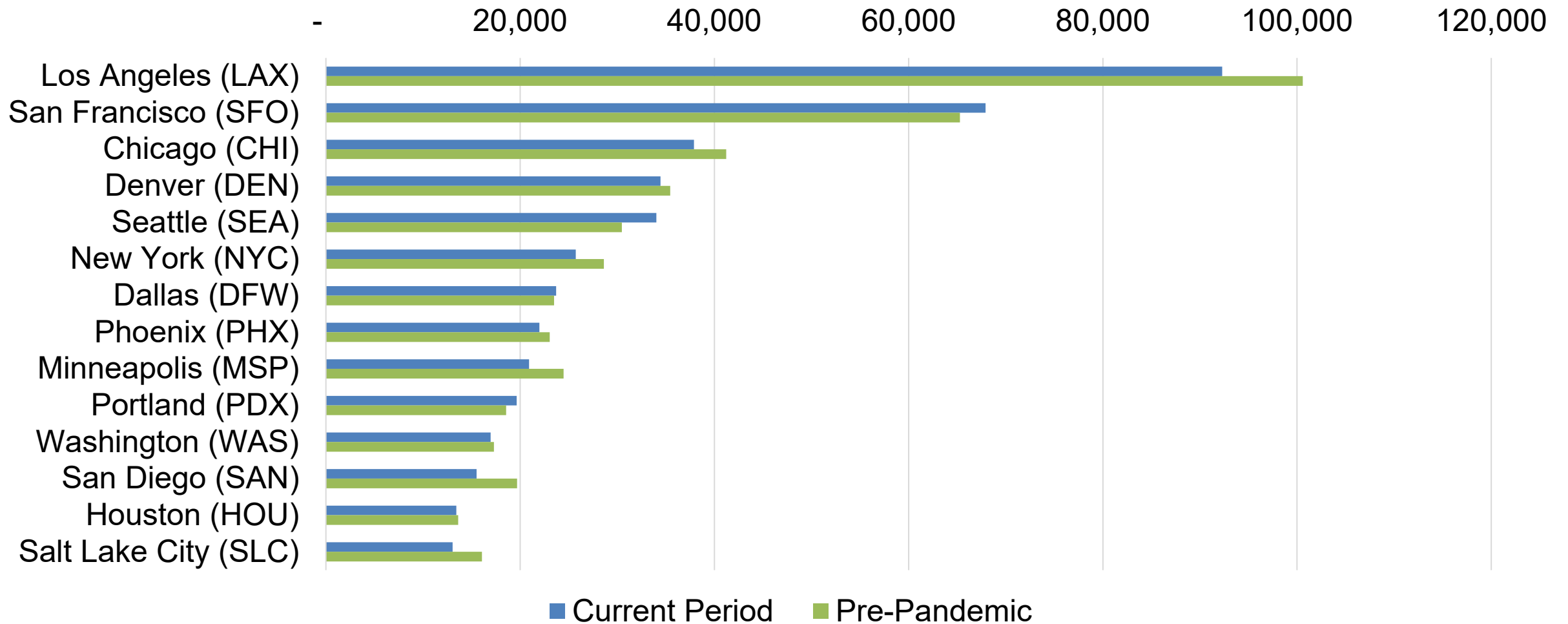


# Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

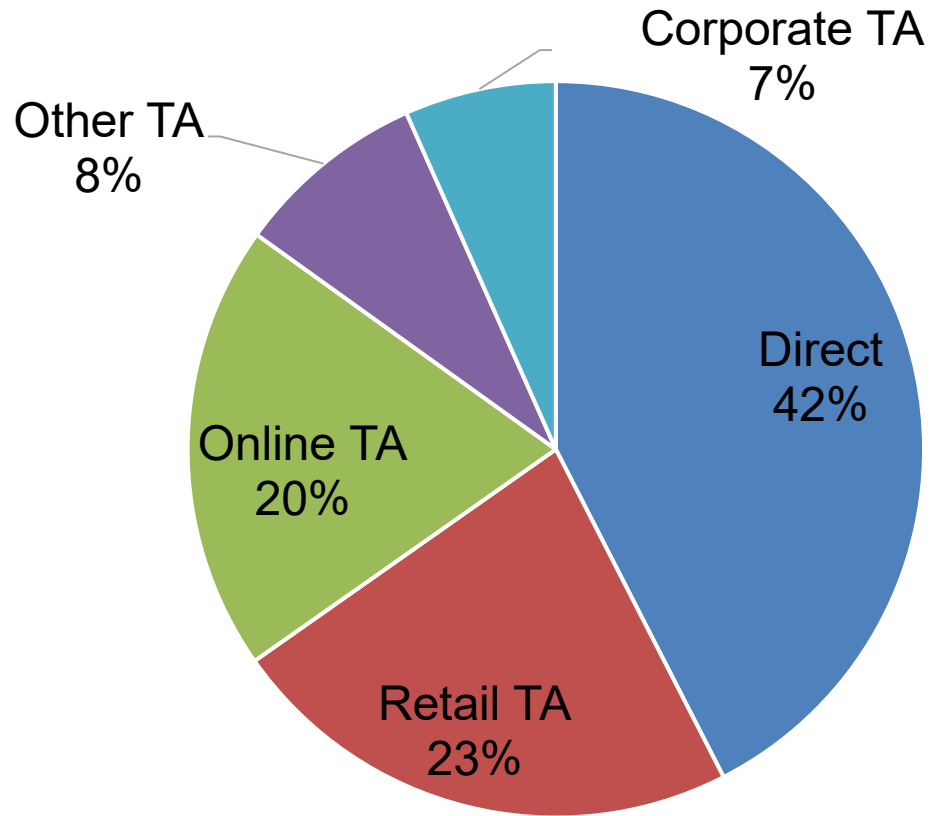
# Trip Origins: United States



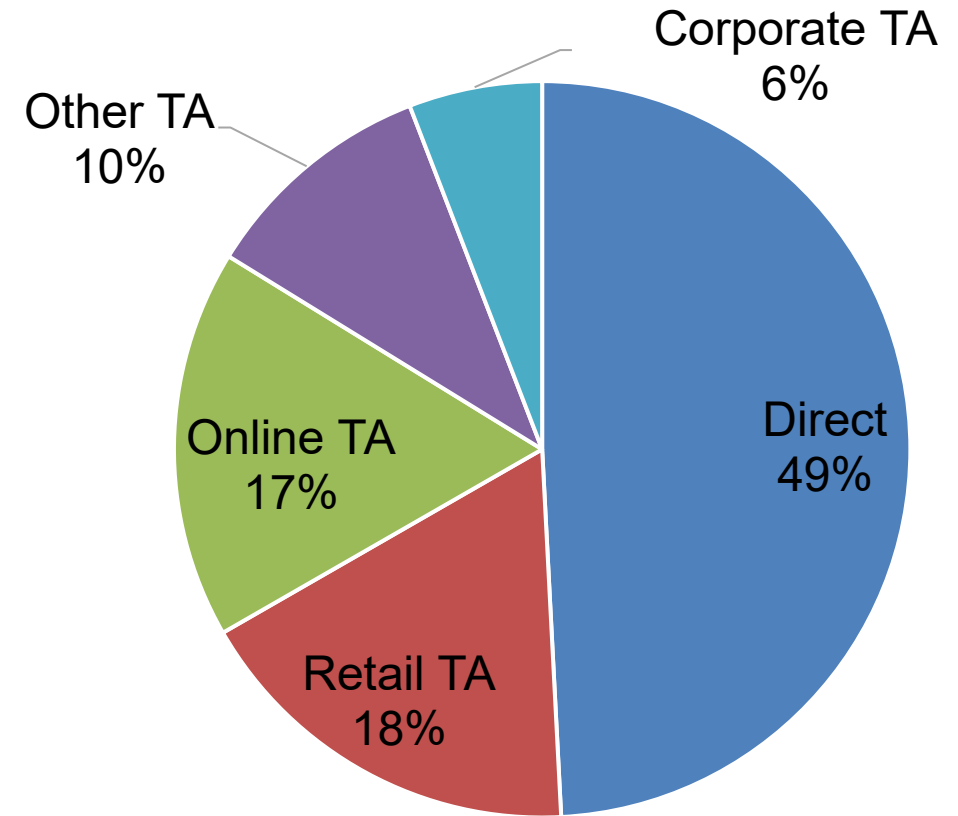
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Distribution Channel: United States

## Pre-Pandemic



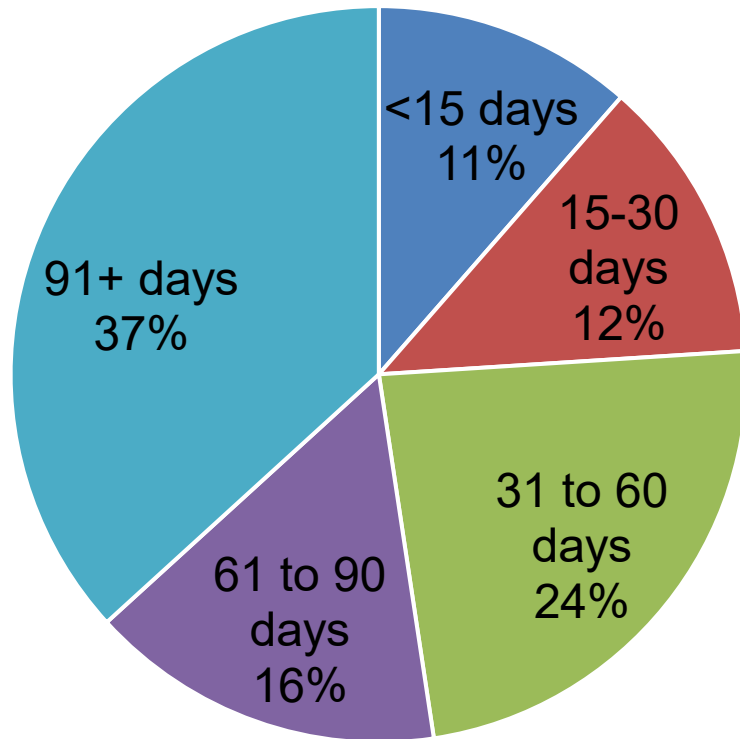
## Current Period



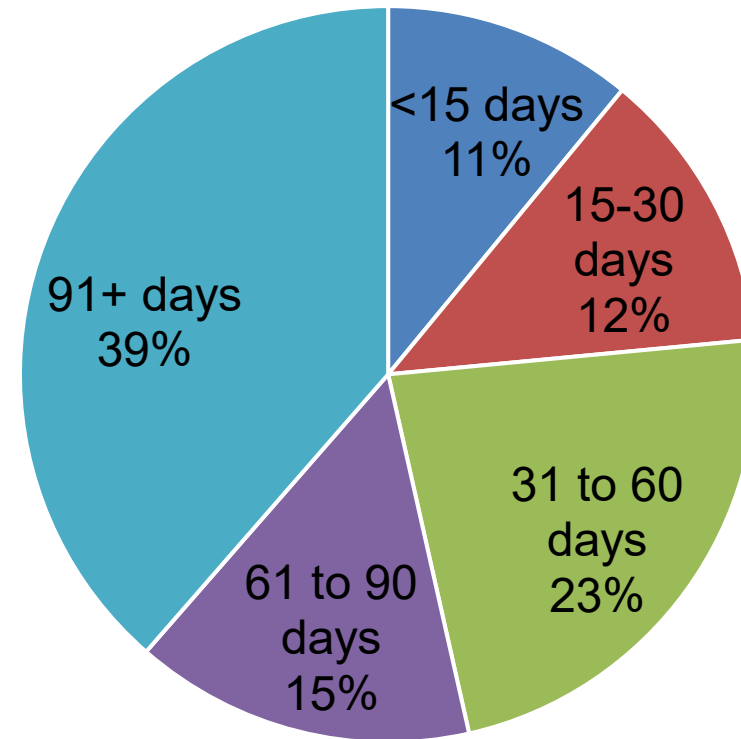
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Lead Time: United States

## Pre-Pandemic

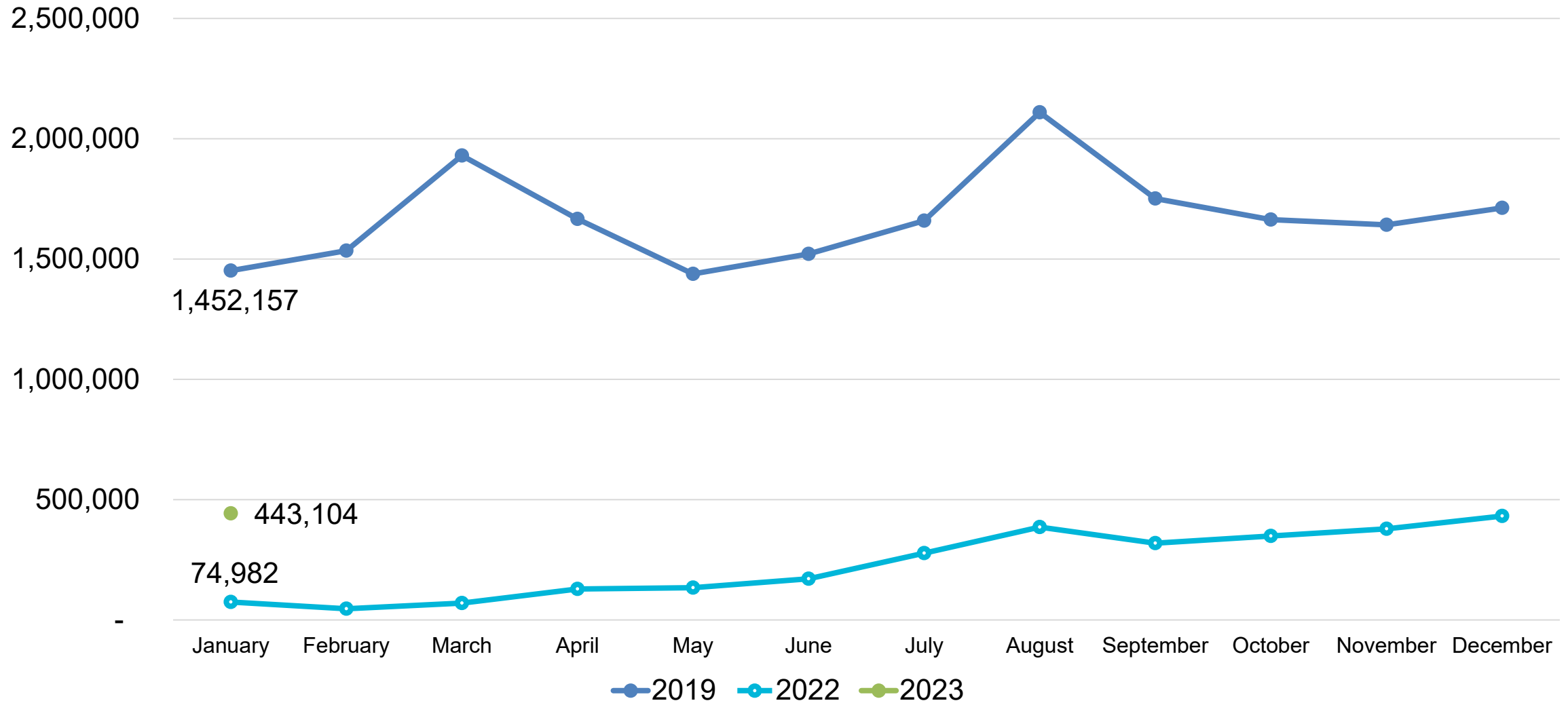


## Current Period



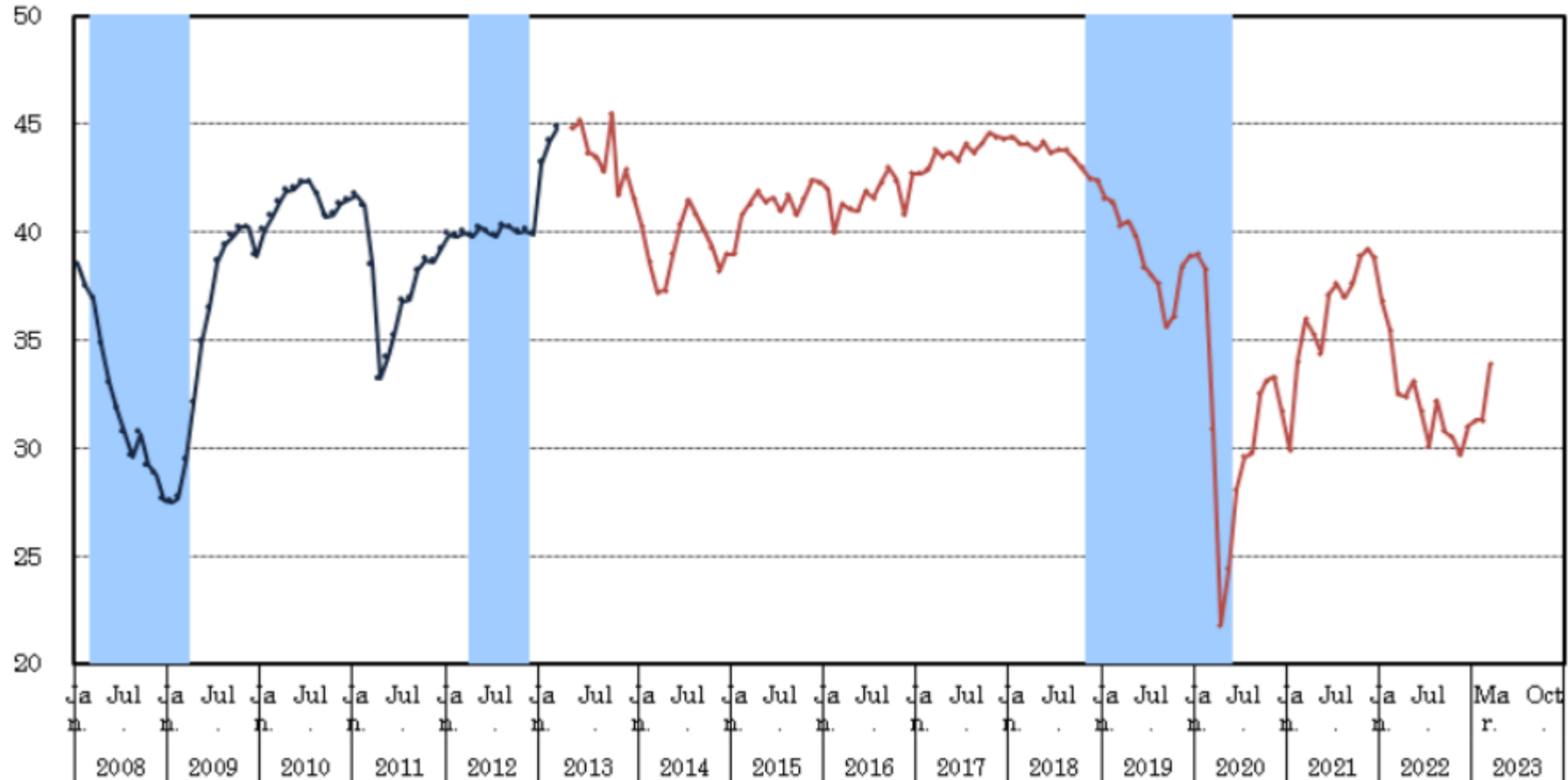
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Japanese Residents' Visits Abroad



Source: Immigration Services Agency of Japan

# Japan Consumer Confidence Index



Source: Cabinet Office of Japan

# JATA: Outbound Recovery

- Japan Association of Travel Agents (JATA) launched a year-round promotion project to boost outbound travel demand on April 1, 2023
- JATA has a goal to exceed 2019's 20 million outbound trips by 2025
- COVID-19 lowering to same category as influenza as of May 8, 2023
- Additional details to be announced on May 15, 2023

# Tourism Economics: Japan Snapshot

	2020	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
<b>Drivers</b>						
GDP per capita (real, US\$)	47,250.0	0.9%	2.2%	1.5%	2.4%	1.8%
Population, total (mns)	126.5	-0.3%	-0.4%	-0.4%	-0.4%	-0.4%
Employment, total (mns)	67.1	0.0%	0.2%	0.3%	0.4%	-0.2%
% middle class households	87%	87%	87%	87%	87%	87%
Weighted average exchange rate index	99.1	-6%	-12%	-5%	-1%	3%
<b>Departures</b>						
Departures (000s)	3,029.6	-83.6%	634.3%	106.5%	73.3%	37.6%
Destinations per trip*	1.3	1.3	1.3	1.3	1.3	1.3
Average length of stay per destination*	4.4	4.2	4.9	4.5	4.4	4.4
Average spend per trip (nom., US\$)	1,672.0	43.9%	-13.8%	-40.0%	-25.4%	-5.6%
Total business spend (nom., US\$ bns)	0.5	-61.9%	451.9%	20.6%	23.5%	30.3%
Total leisure spend (nom., US\$ bns)	4.6	-78.0%	548.7%	24.5%	30.2%	29.8%

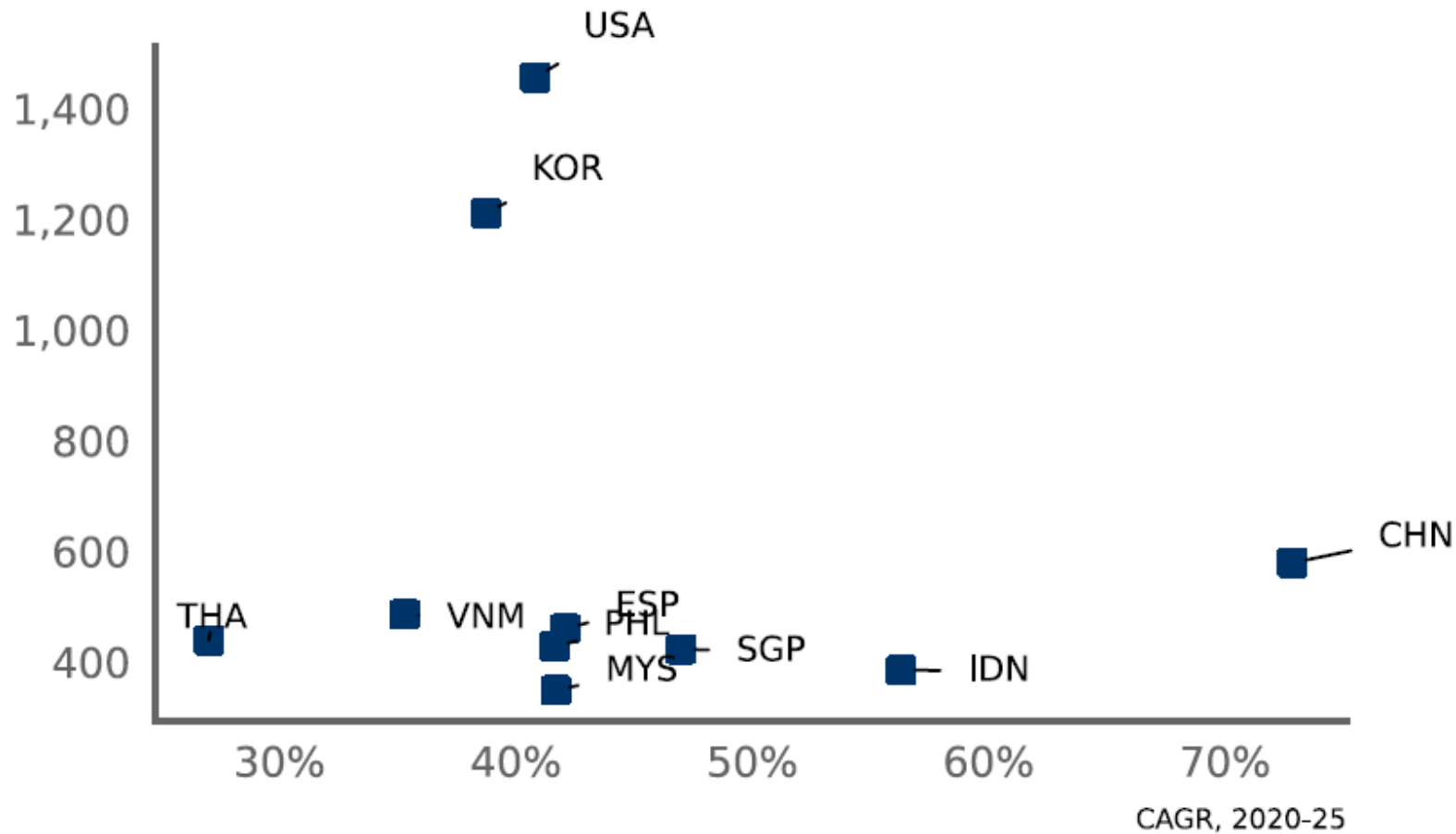
Source: Tourism Economics, Global Travel Country Profile – Japan, March 2023



# Tourism Economics: Japan Destinations

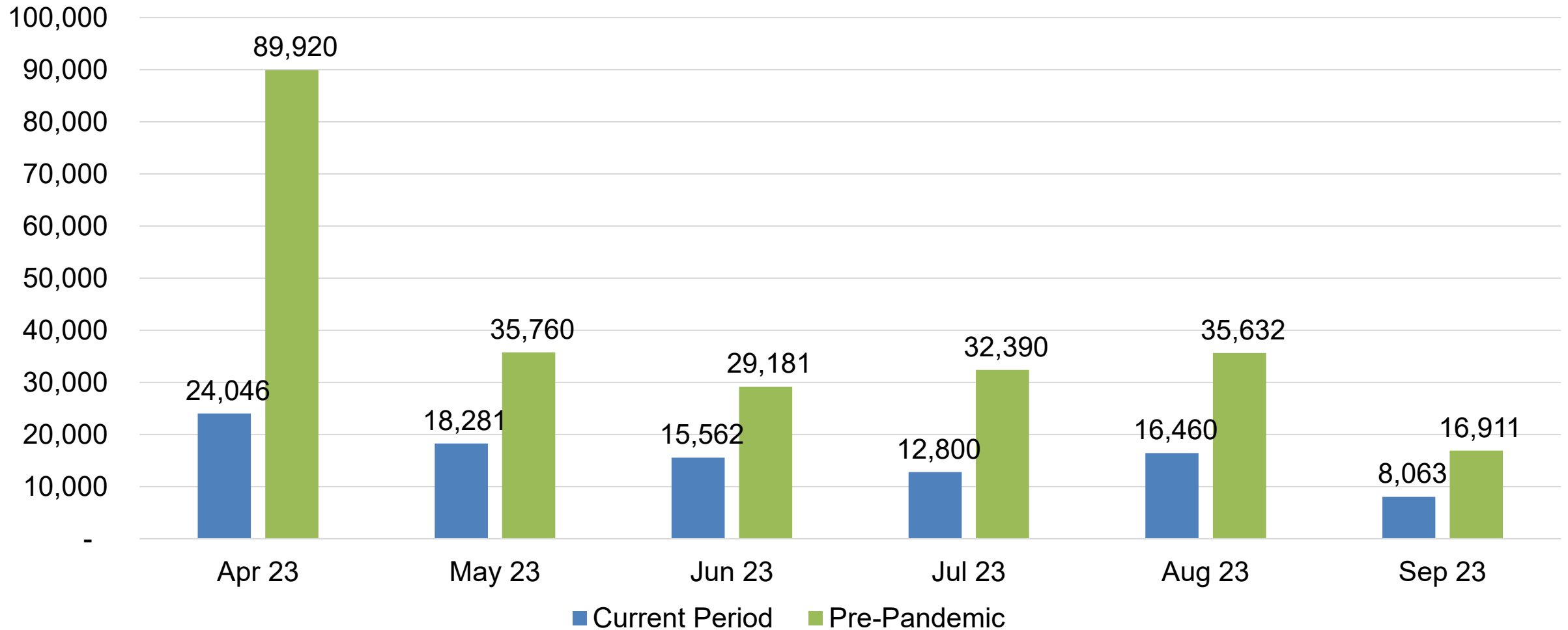
## Japan: Top destinations vs. growth

No. of visits: 2023 (000s)



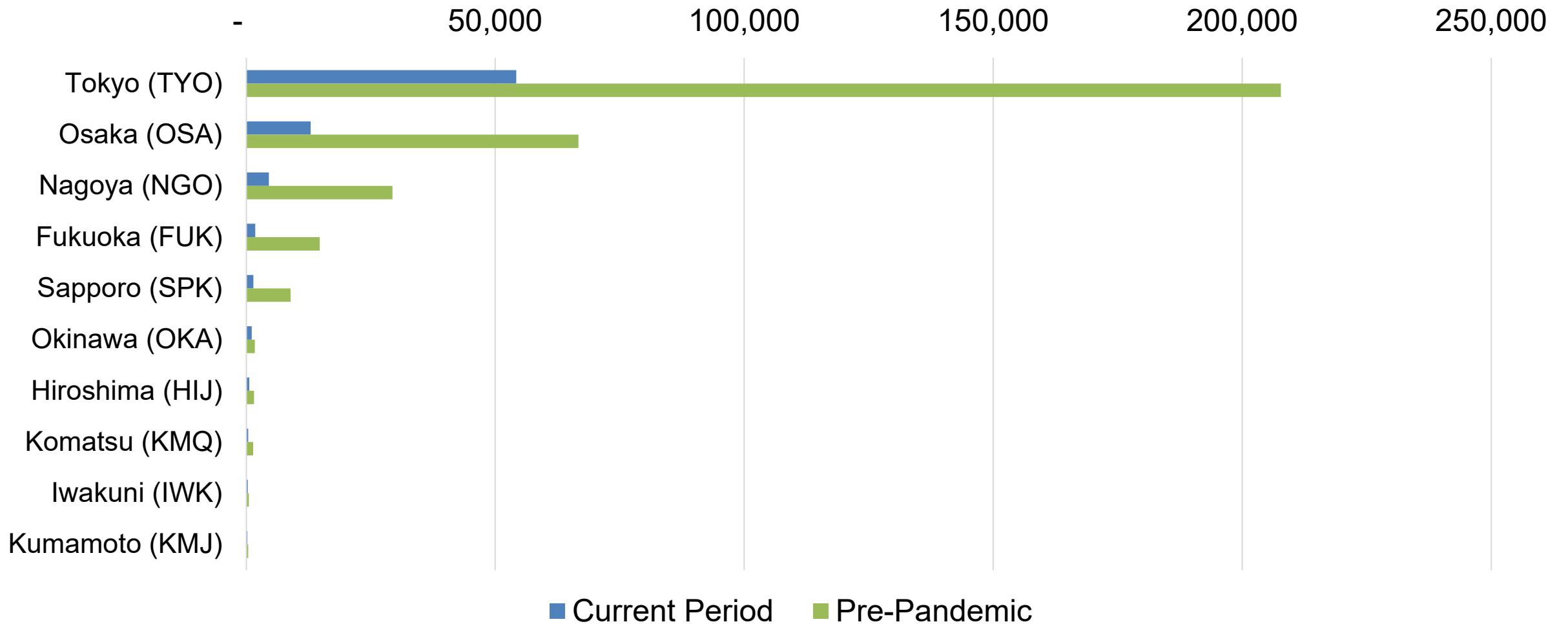
Source: Tourism Economics, Global Travel Country Profile – Japan, March 2023

# Six Month Outlook: Japan



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

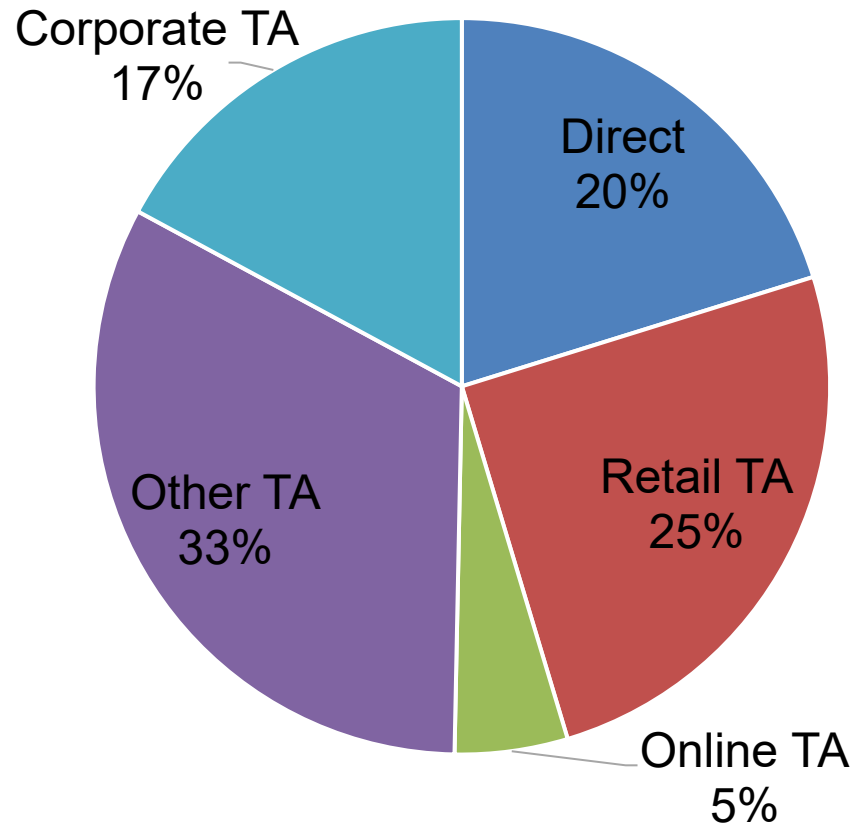
# Trip Origins: Japan



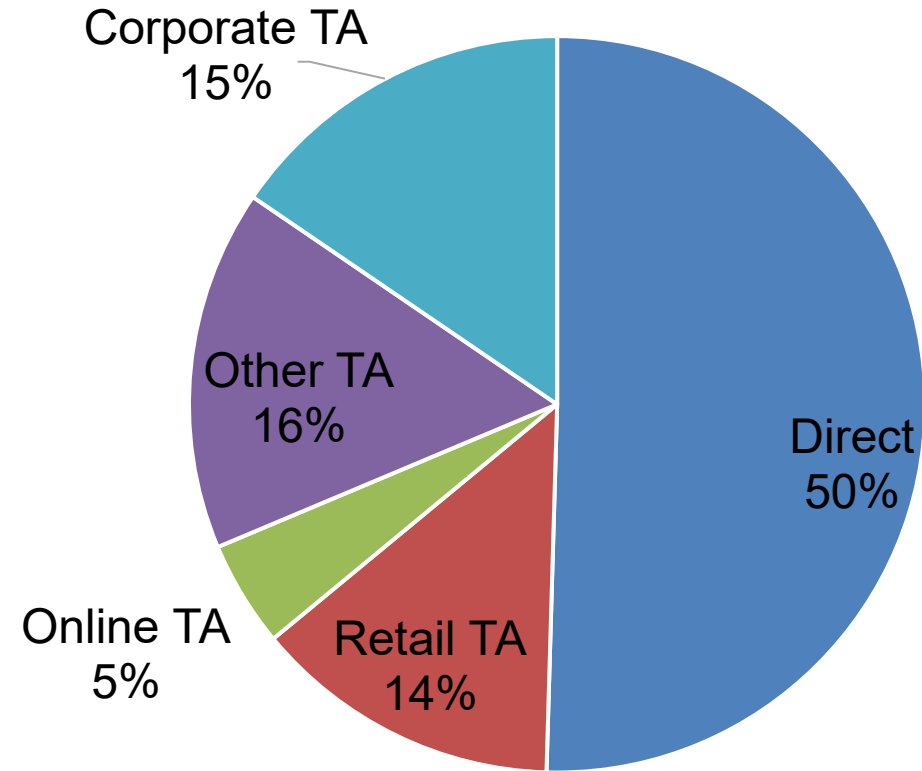
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Distribution Channel: Japan

## Pre-Pandemic



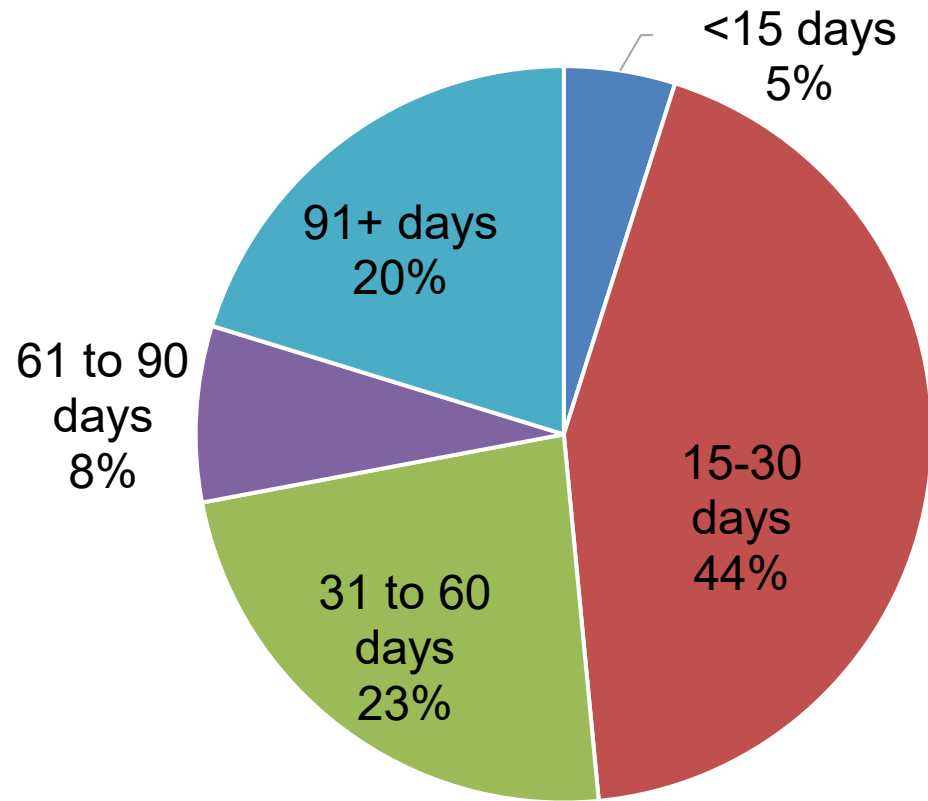
## Current Period



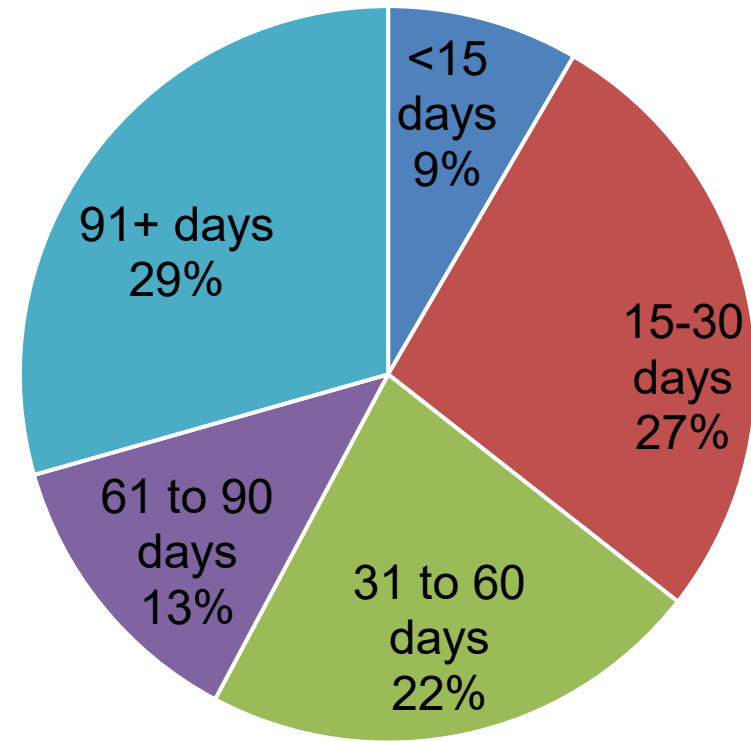
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Lead Time: Japan

## Pre-Pandemic

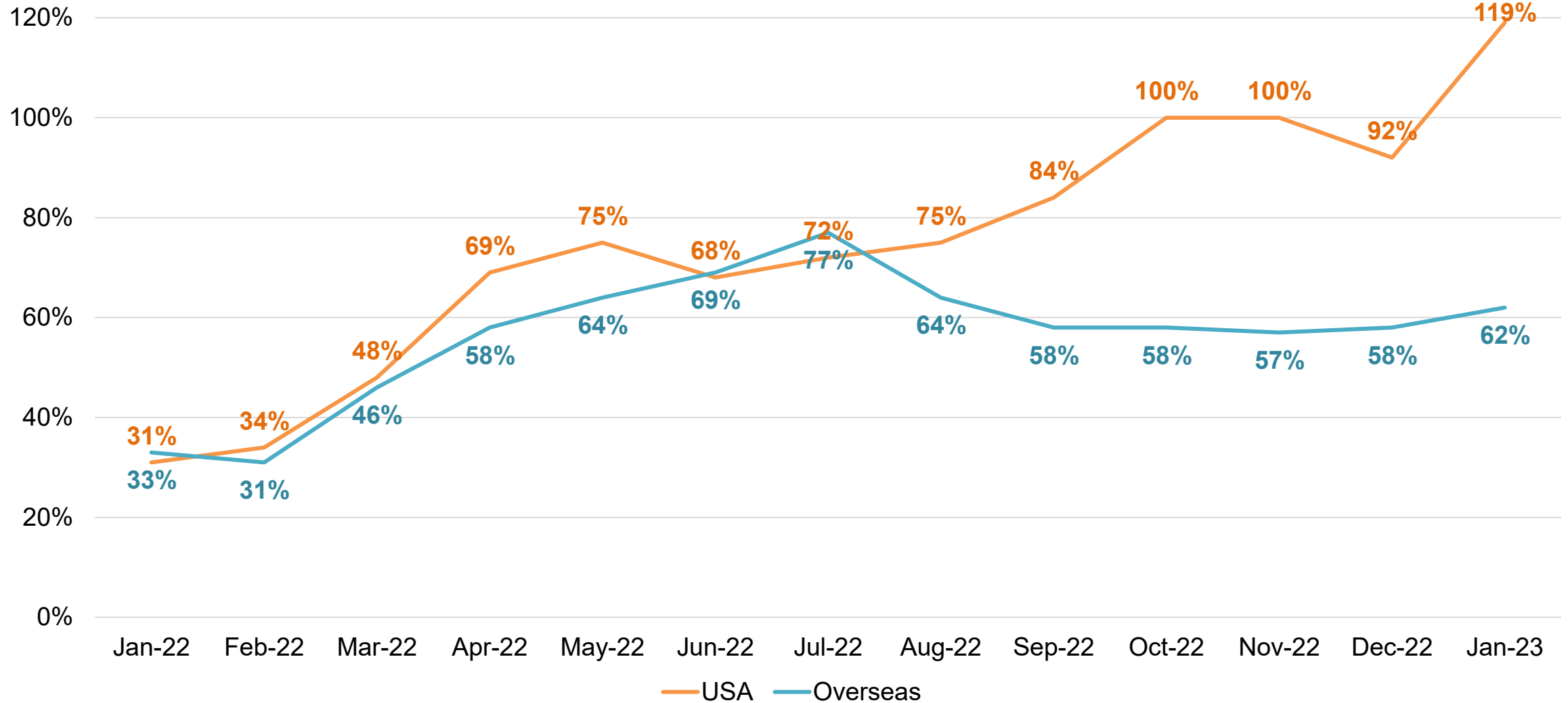


## Current Period



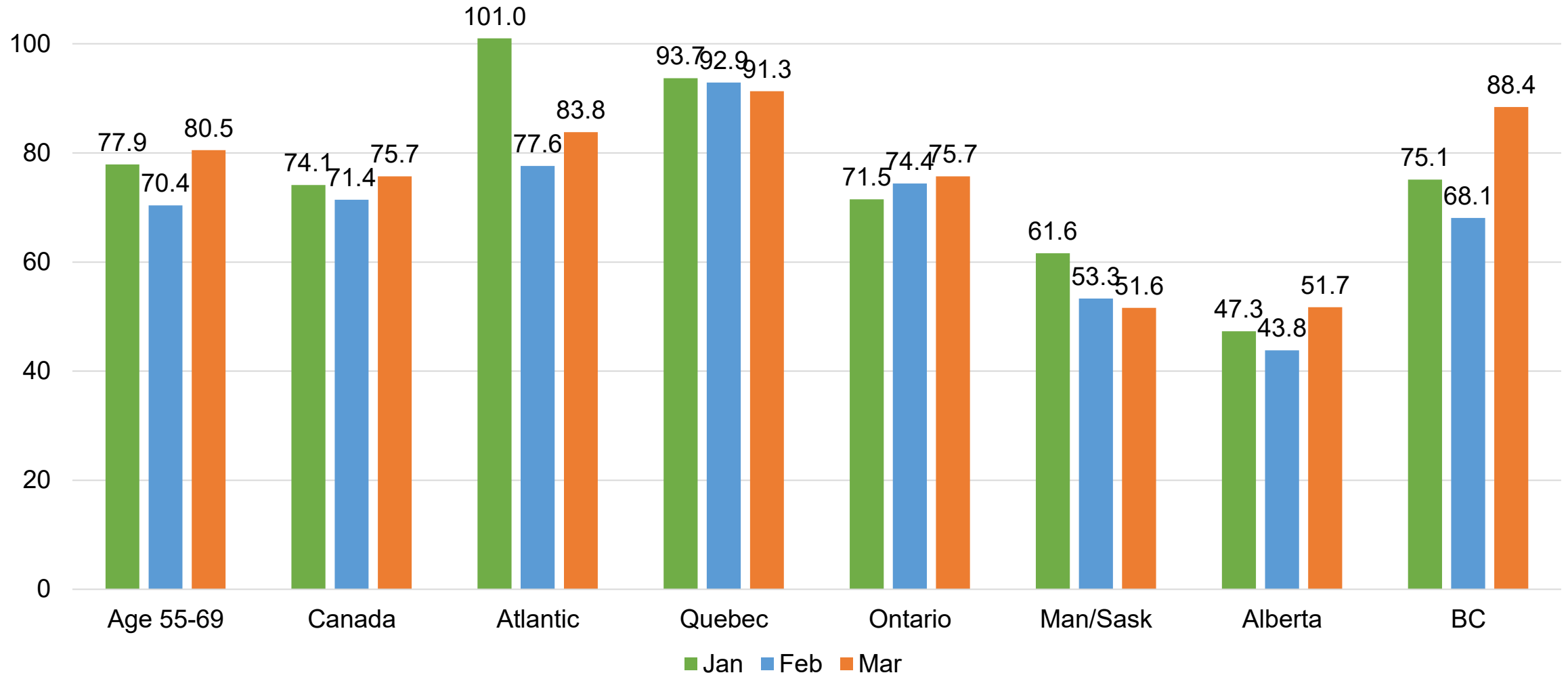
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Canada Monthly Trip Activity (%Pre-Pandemic Volume)



Source: Statistics Canada, Conference Board of Canada

# Canada Consumer Confidence Index



Source: Conference Board of Canada, Index of Consumer Confidence

# Tourism Economics: Canada Snapshot

	2020	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
<b>Drivers</b>						
GDP per capita (real, US\$)	50,194.6	2.3%	-0.8%	-2.1%	2.5%	2.2%
Population, total (mns)	38.0	0.6%	1.2%	1.1%	1.0%	1.0%
Employment, total (mns)	18.0	4.8%	3.6%	-0.6%	0.7%	2.1%
% middle class households	97%	97%	97%	97%	97%	97%
Weighted average exchange rate index	96.8	6%	-1%	-4%	2%	6%
<b>Departures</b>						
Departures (000s)	6,367.0	-48.9%	397.4%	21.5%	21.9%	16.1%
Destinations per trip*	1.5	1.5	1.5	1.5	1.5	1.5
Average length of stay per destination*	5.7	5.4	5.4	5.5	5.5	5.6
Average spend per trip (nom., US\$)	1,734.4	6.6%	-9.3%	-12.1%	-5.9%	8.5%
Total business spend (nom., US\$ bns)	1.2	-32.5%	265.8%	2.0%	11.4%	21.4%
Total leisure spend (nom., US\$ bns)	9.9	-47.1%	364.0%	7.5%	15.1%	26.4%

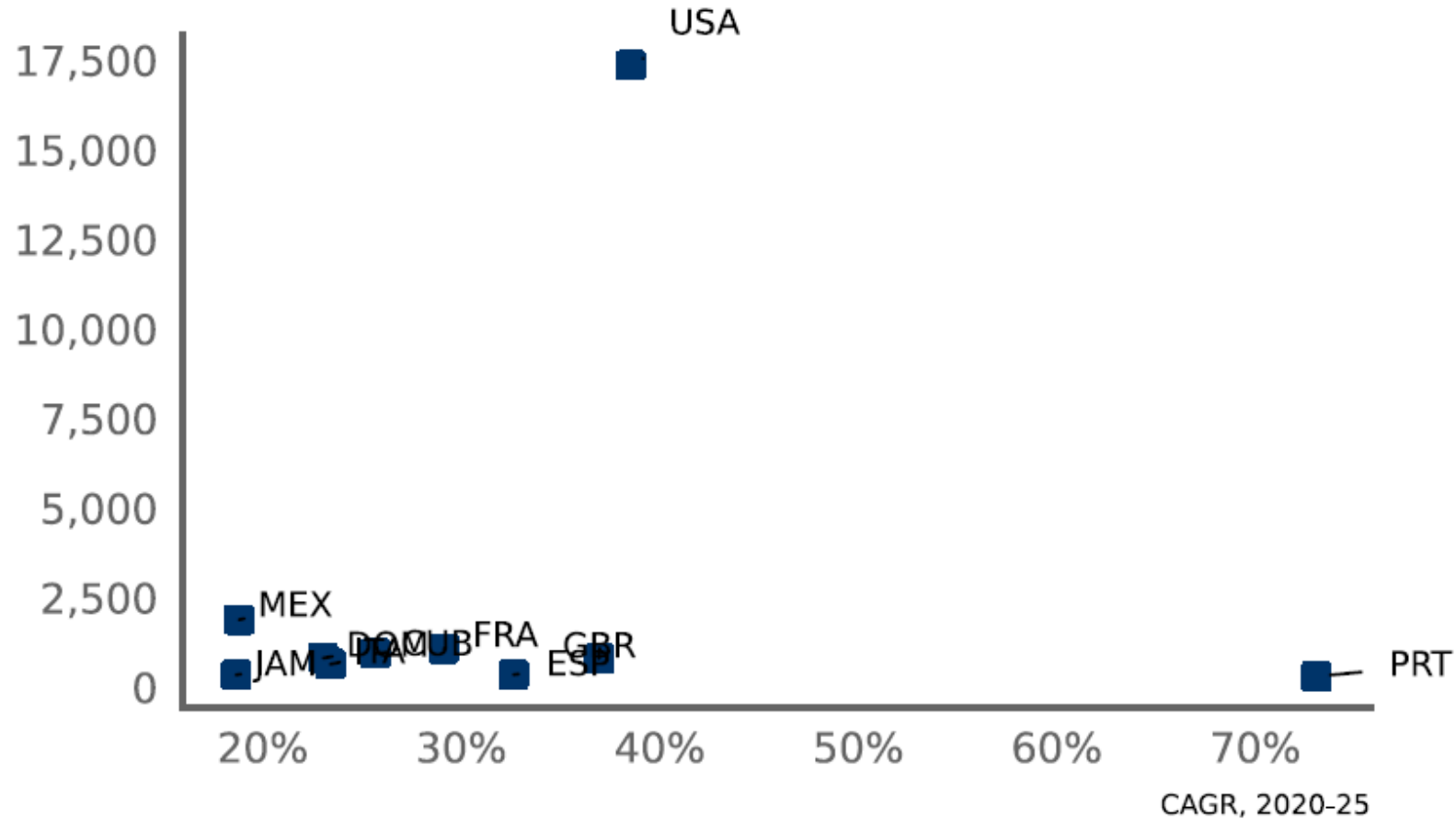
Source: Tourism Economics, Global Travel Country Profile – Canada, March 2023



# Tourism Economics: Canada Destinations

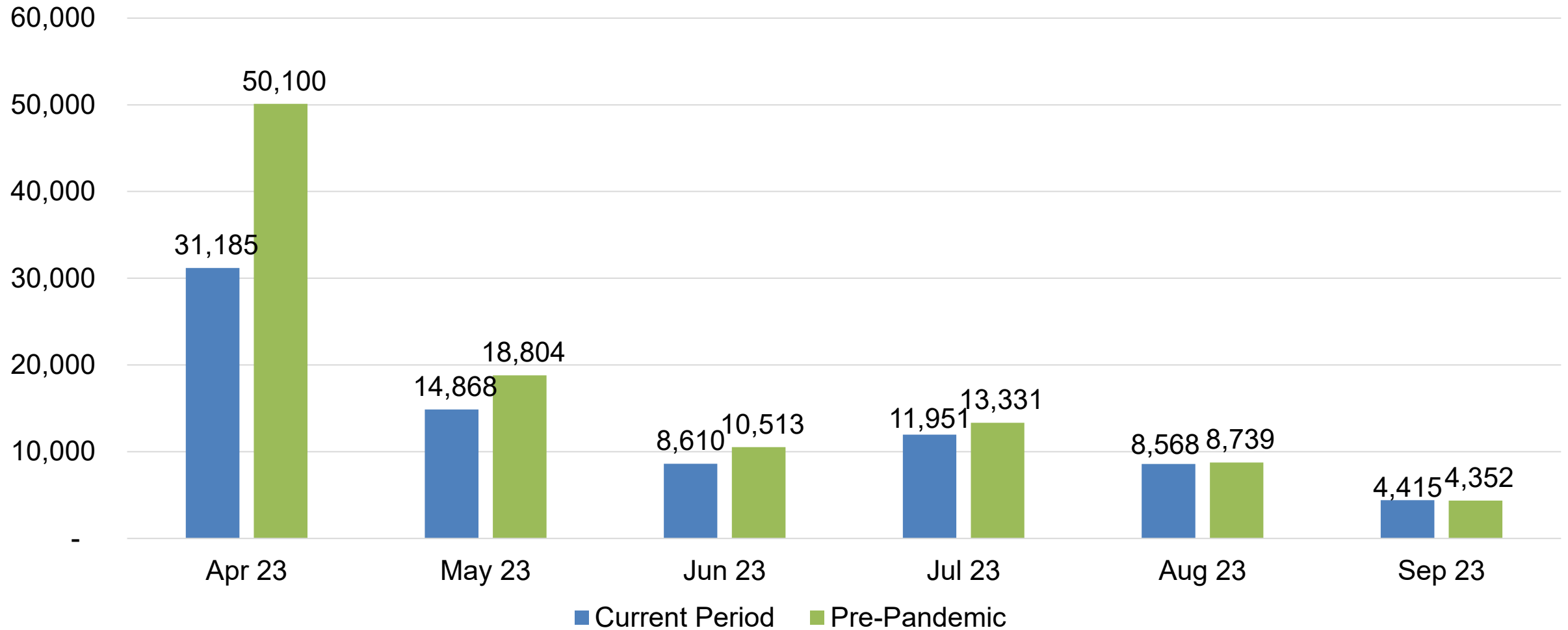
## Canada: Top destinations vs. growth

No. of visits: 2023 (000s)



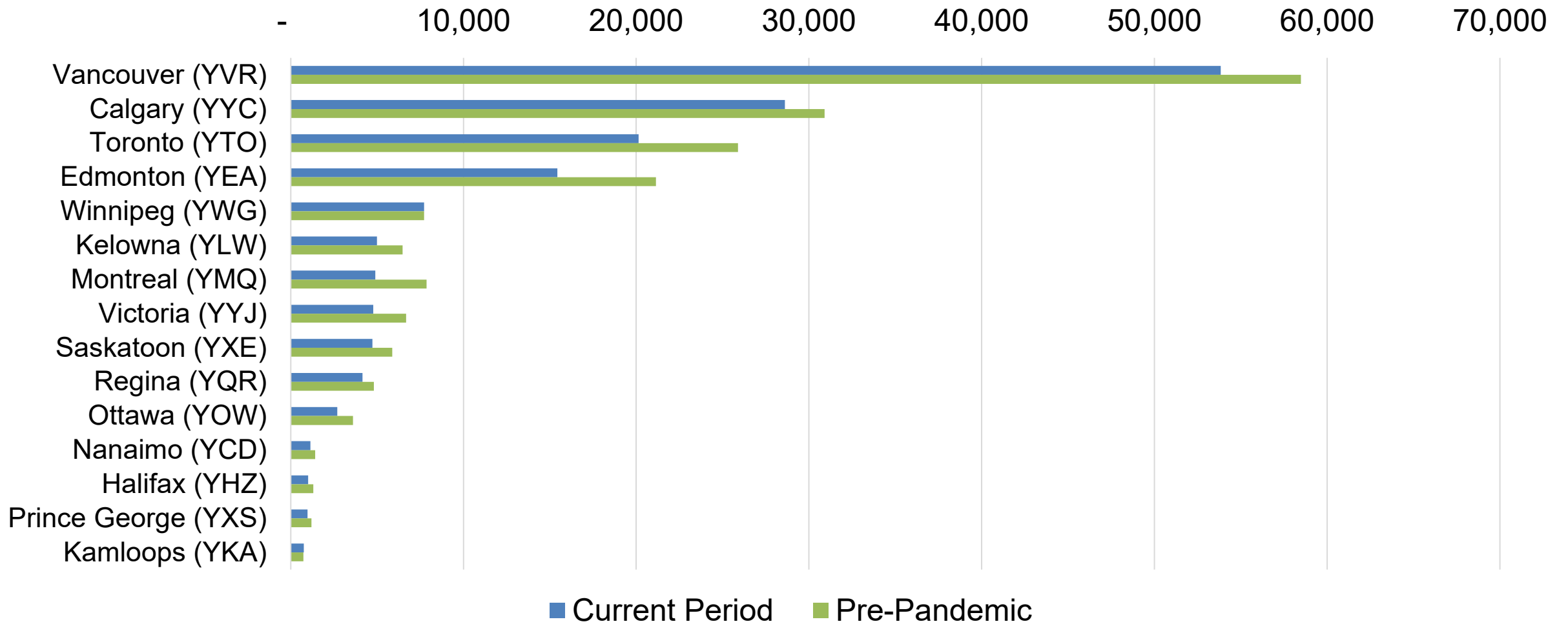
Source: Tourism Economics, Global Travel Country Profile – Canada, March 2023

# Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

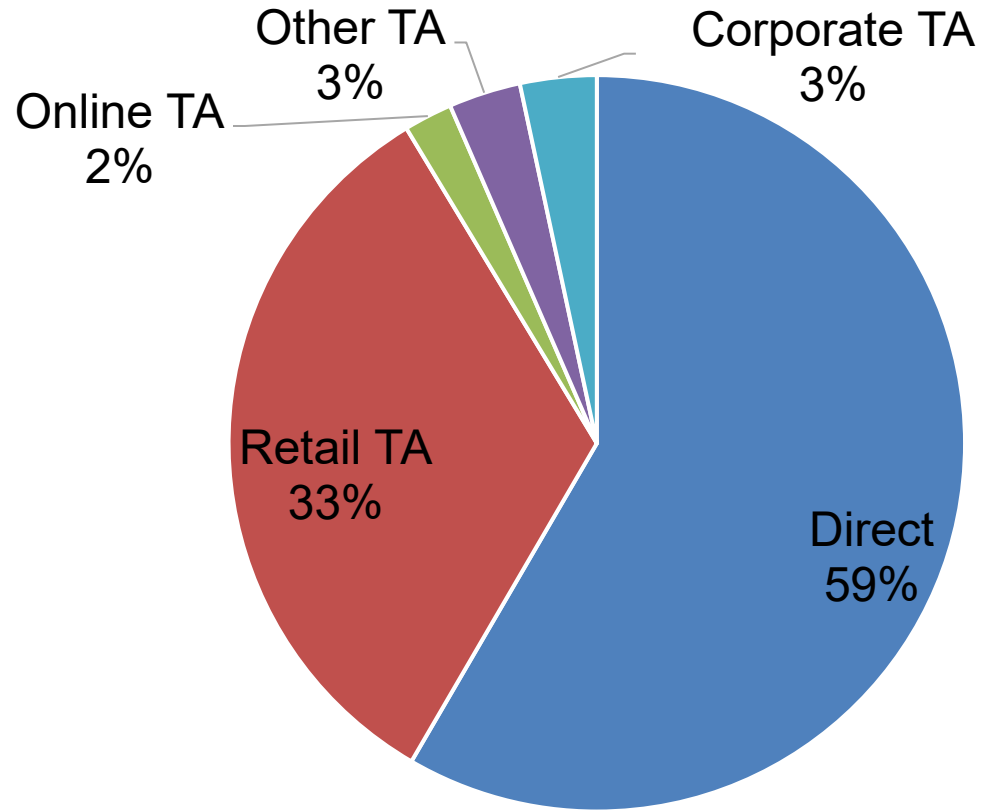
# Trip Origins: Canada



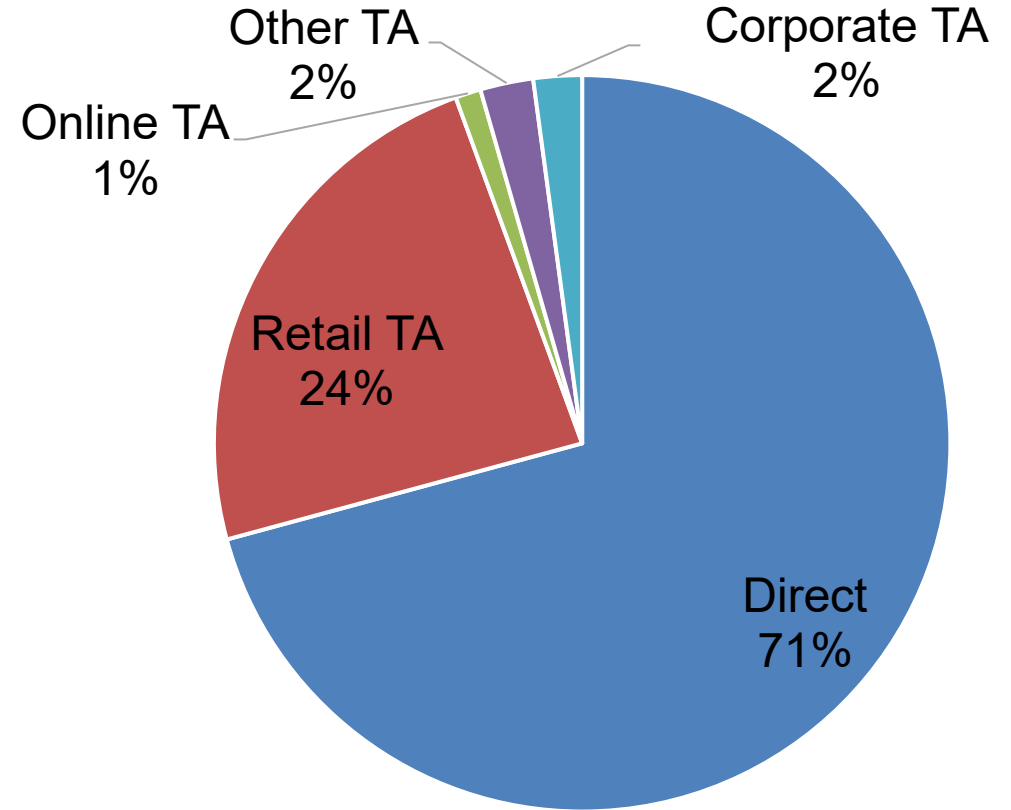
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Distribution Channel: Canada

## Pre-Pandemic



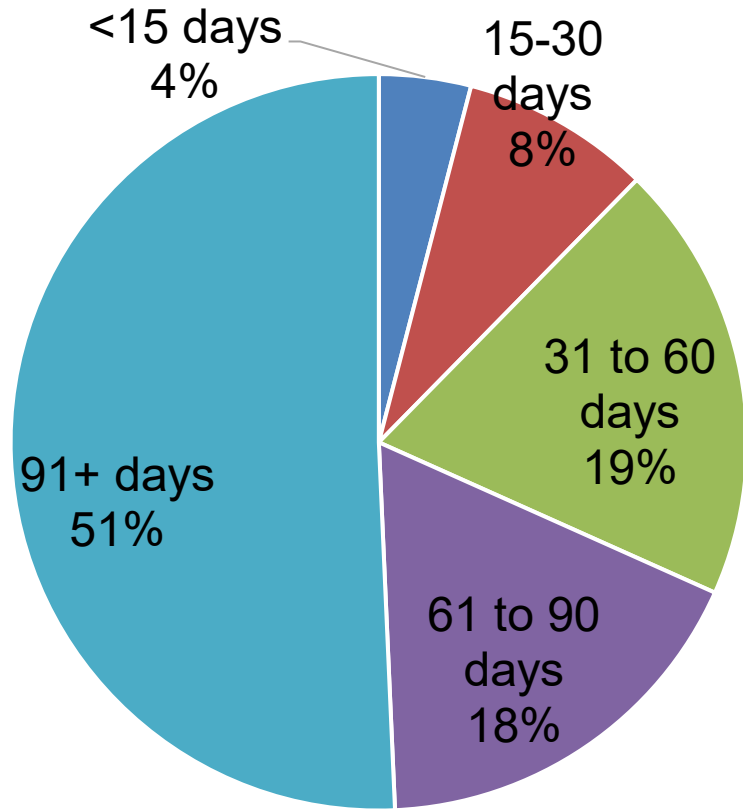
## Current Period



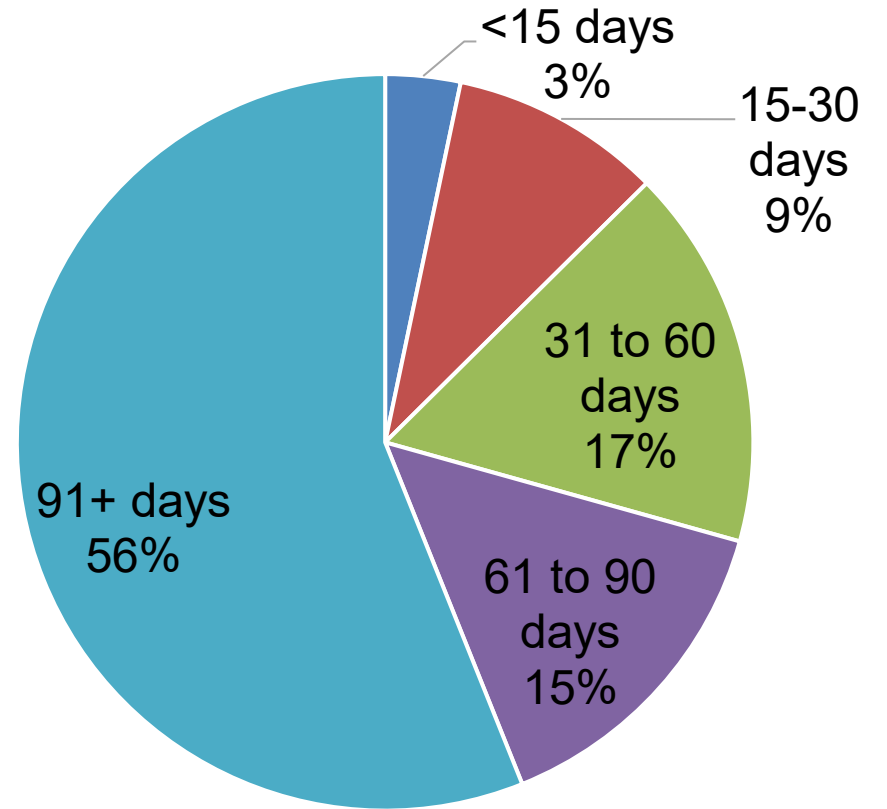
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Lead Time: Canada

## Pre-Pandemic



## Current Period



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Tourism Economics: Korea Snapshot

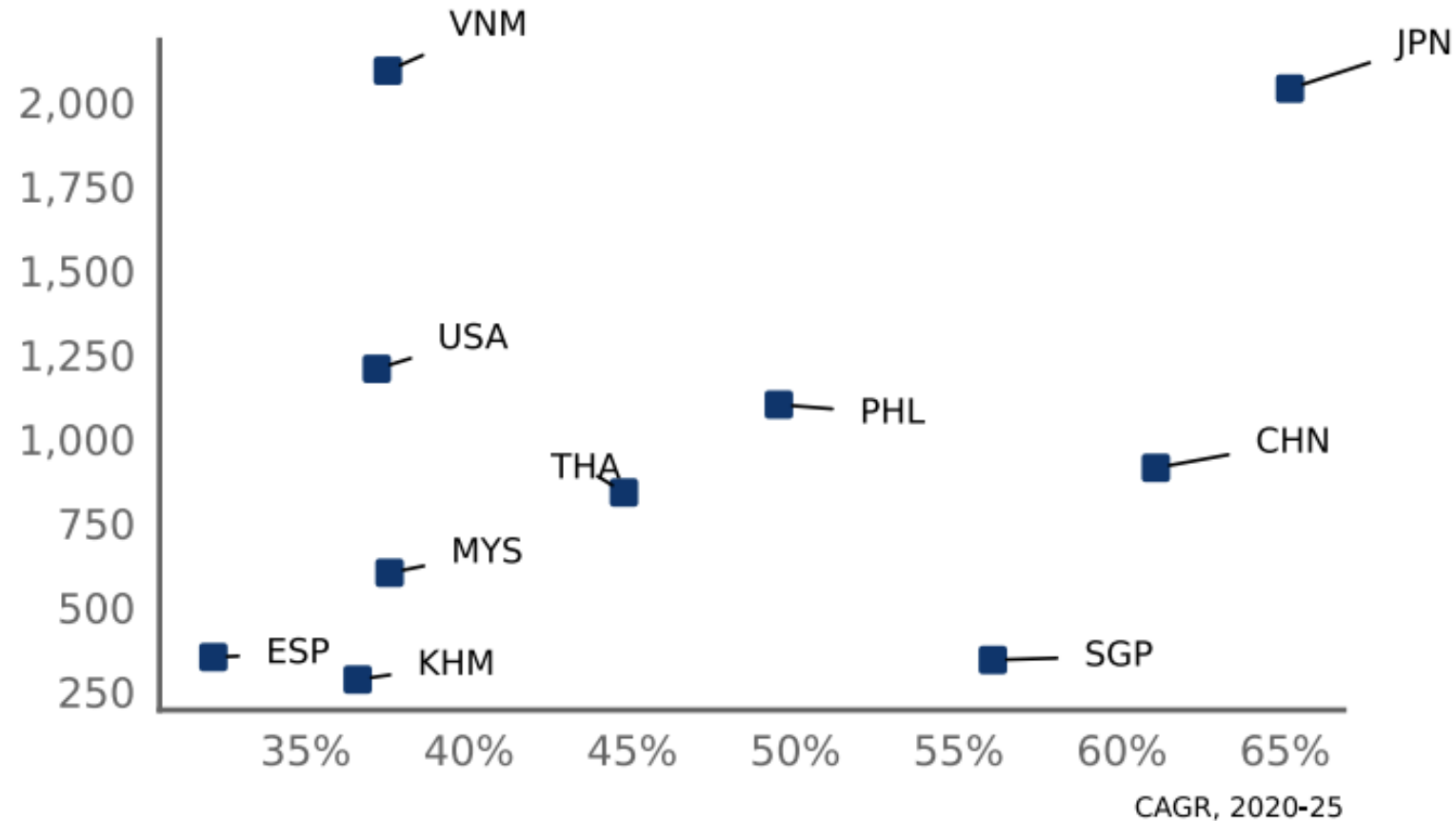
	2020	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
<b>Drivers</b>						
GDP per capita (real, US\$)	28,807.7	4.1%	1.9%	1.6%	3.2%	2.4%
Population, total (mns)	51.9	0.1%	-0.0%	-0.1%	-0.1%	-0.1%
Employment, total (mns)	26.9	1.3%	3.0%	-0.4%	-0.2%	0.3%
% middle class households	86%	86%	87%	87%	87%	88%
Weighted average exchange rate index	83.7	0%	-5%	0%	0%	4%
<b>Departures</b>						
Departures (000s)	4,285.6	-59.4%	194.8%	120.6%	71.5%	34.3%
Destinations per trip*	1.2	1.2	1.2	1.2	1.2	1.2
Average length of stay per destination*	3.8	3.7	3.9	3.7	3.7	3.7
Average spend per trip (nom., US\$)	3,305.7	159.2%	-69.5%	-39.6%	-27.4%	-2.6%
Total business spend (nom., US\$ bns)	0.8	8.8%	-14.8%	34.0%	29.7%	37.2%
Total leisure spend (nom., US\$ bns)	13.4	5.1%	-9.8%	33.3%	24.1%	30.4%

Source: Tourism Economics, Global Travel Country Profile – South Korea, March 2023

# Tourism Economics: Korea Destinations

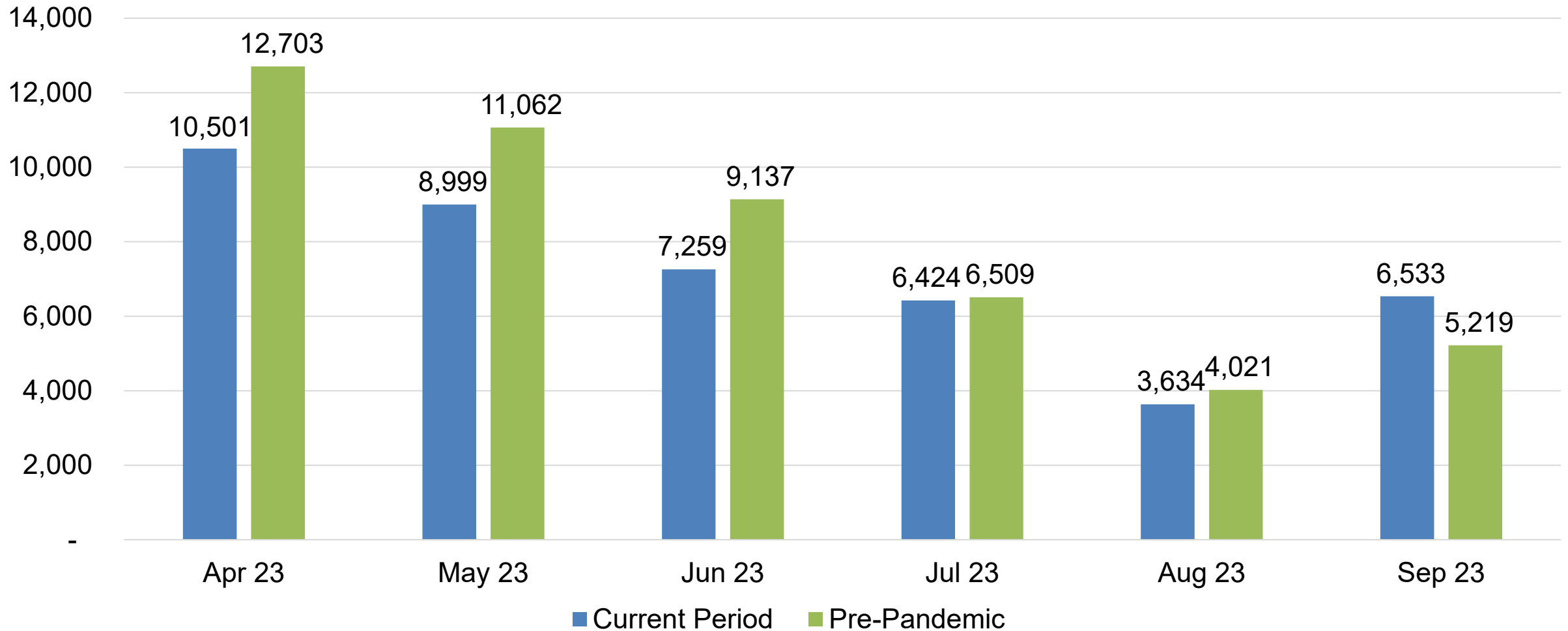
## South Korea: Top destinations vs. growth

No. of visits: 2023 (000s)



Source: Tourism Economics, Global Travel Country Profile – South Korea, March 2023

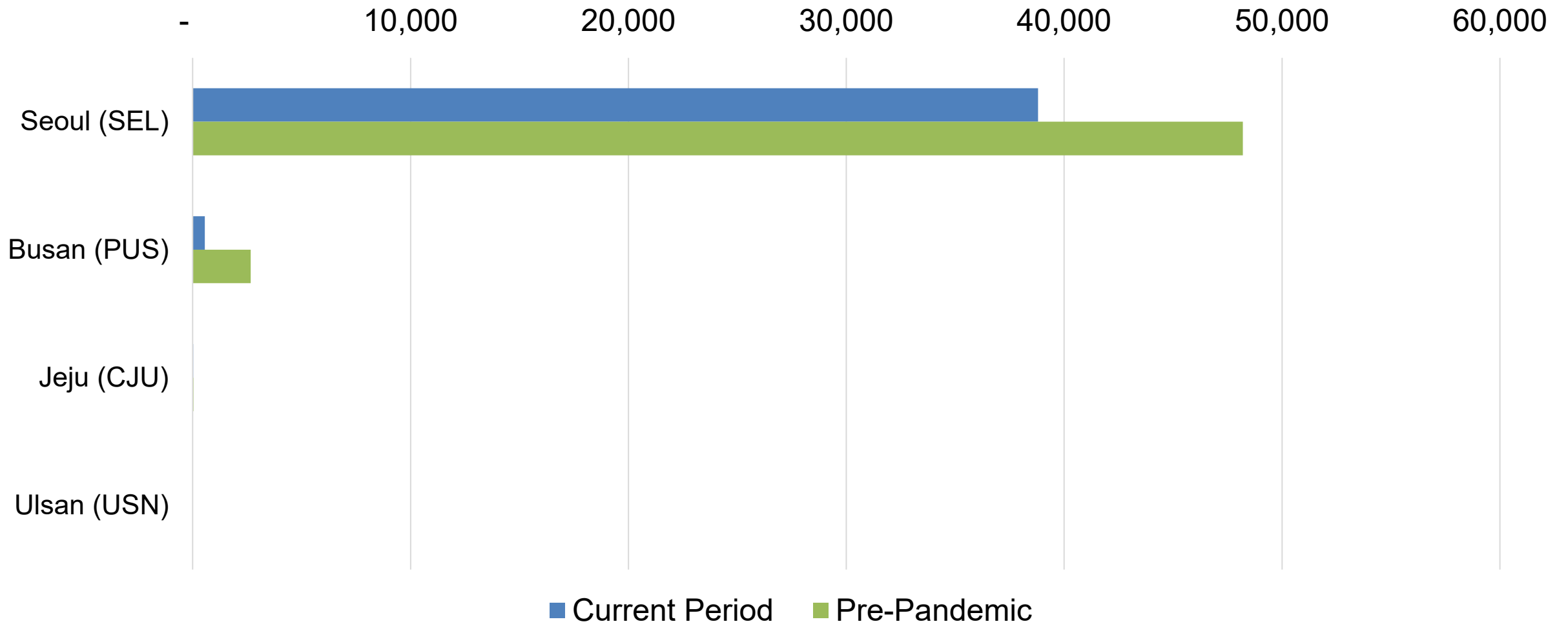
# Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023



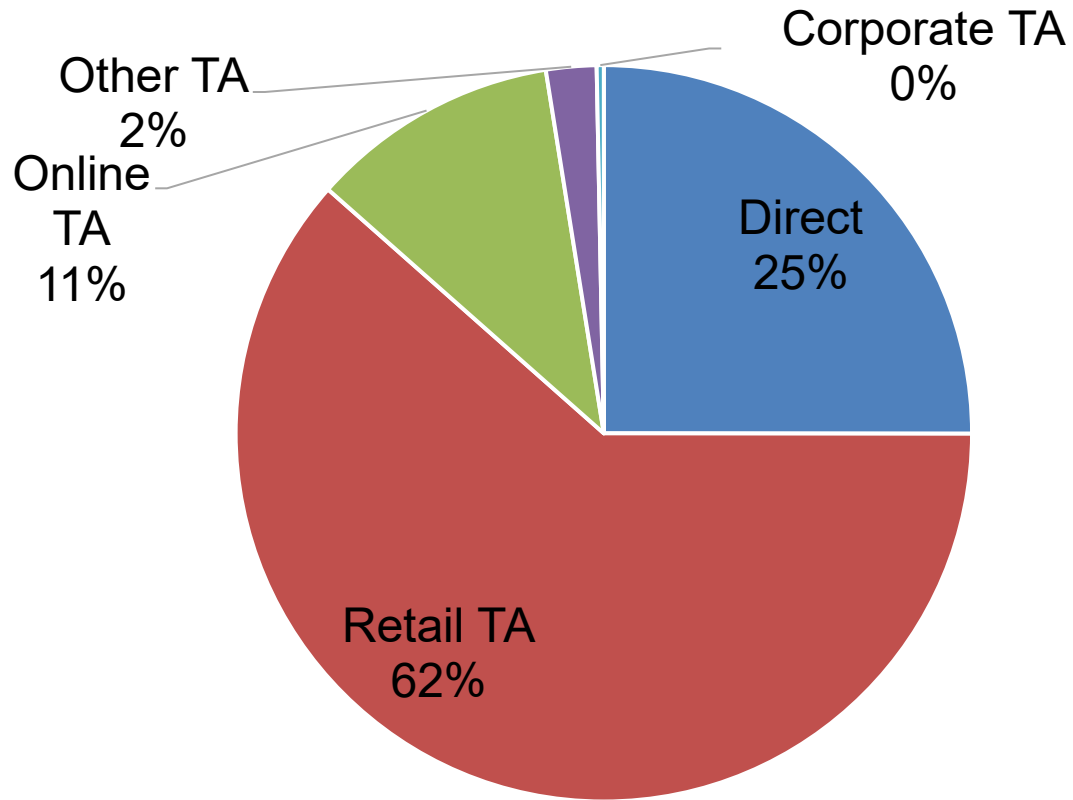
# Trip Origins: Korea



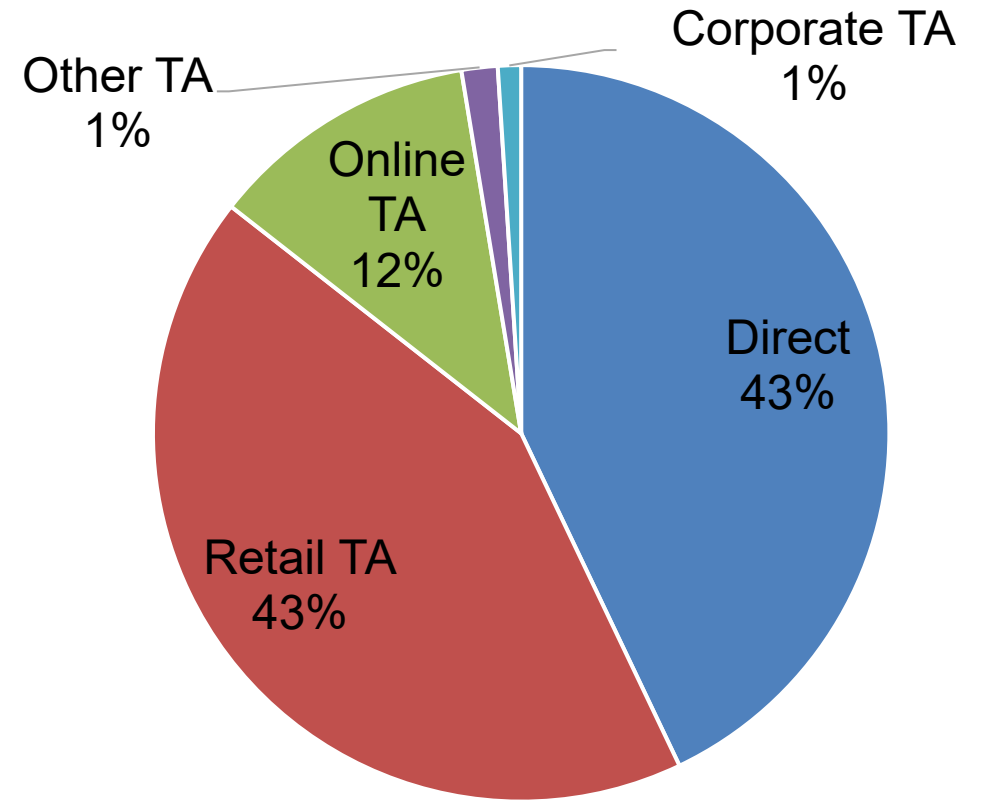
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Distribution Channel: Korea

## Pre-Pandemic



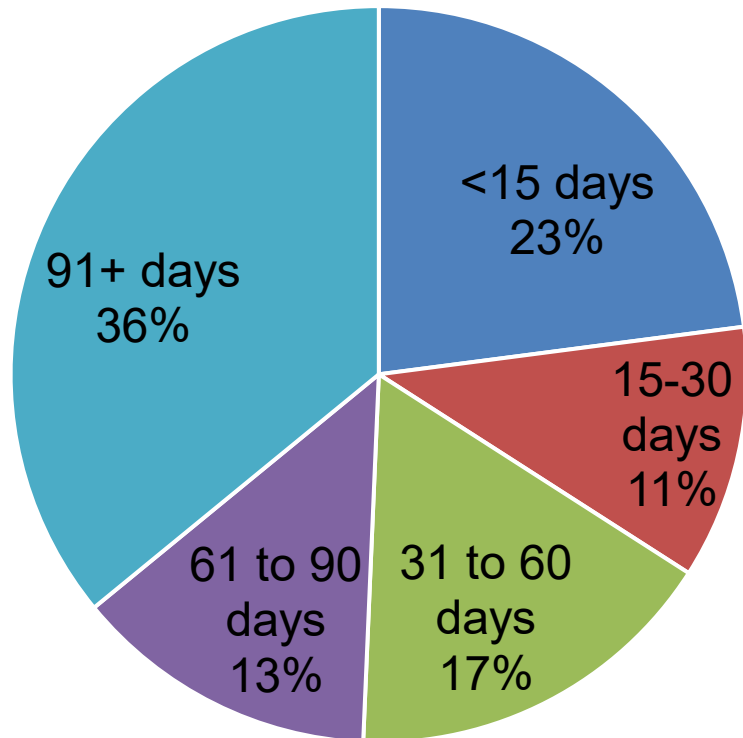
## Current Period



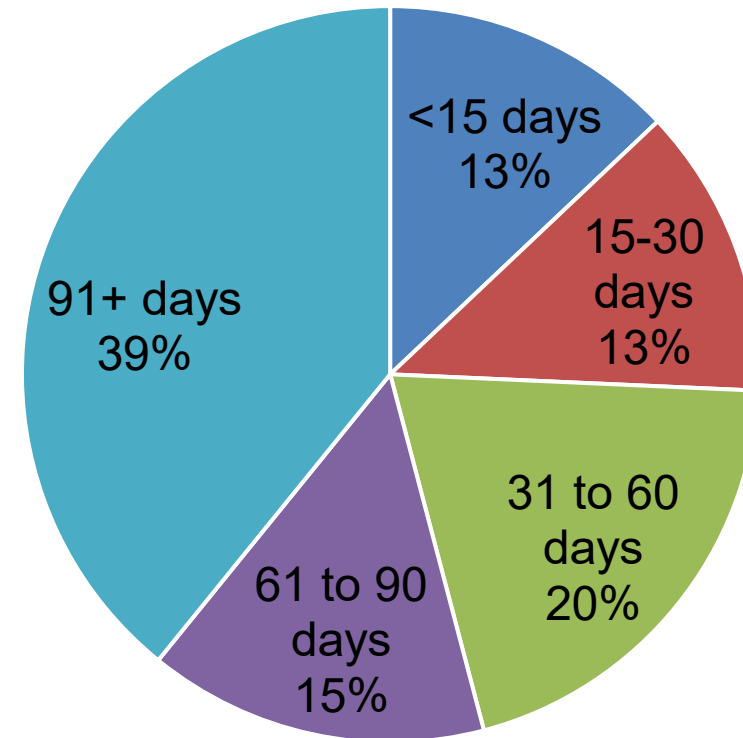
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Lead Time: Korea

## Pre-Pandemic



## Current Period



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Tourism Economics: Australia Snapshot

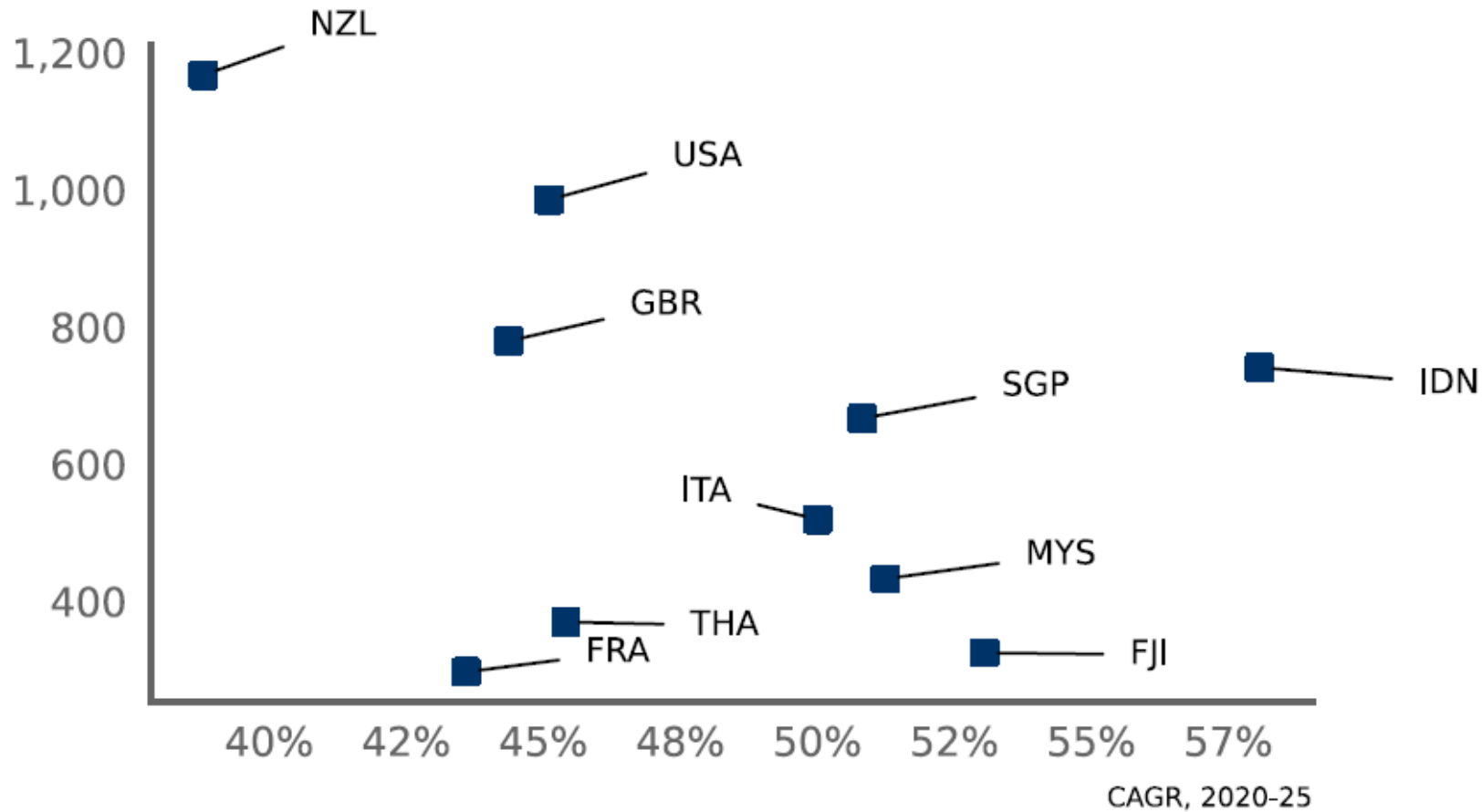
	2020	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
<b>Drivers</b>						
GDP per capita (real, US\$)	61,784.3	4.1%	1.1%	0.2%	2.7%	1.9%
Population, total (mns)	25.6	0.2%	1.1%	1.5%	1.4%	1.4%
Employment, total (mns)	12.7	3.1%	3.7%	1.8%	2.1%	2.4%
% middle class households	96%	96%	96%	96%	96%	96%
Weighted average exchange rate index	99.3	5%	-1%	-1%	2%	1%
<b>Departures</b>						
Departures (000s)	1,955.5	-73.0%	839.7%	40.8%	47.5%	29.0%
Destinations per trip*	1.4	1.1	1.2	1.5	1.5	1.5
Average length of stay per destination*	6.3	5.5	6.7	6.4	6.2	6.2
Average spend per trip (nom., US\$)	3,266.2	-51.7%	46.3%	27.3%	5.7%	6.8%
Total business spend (nom., US\$ bns)	0.7	-50.2%	213.5%	49.8%	38.8%	34.9%
Total leisure spend (nom., US\$ bns)	5.7	-91.4%	2014.0%	82.2%	57.3%	38.0%

Source: Tourism Economics, Global Travel Country Profile – Australia, March 2023

# Tourism Economics: Australia Destinations

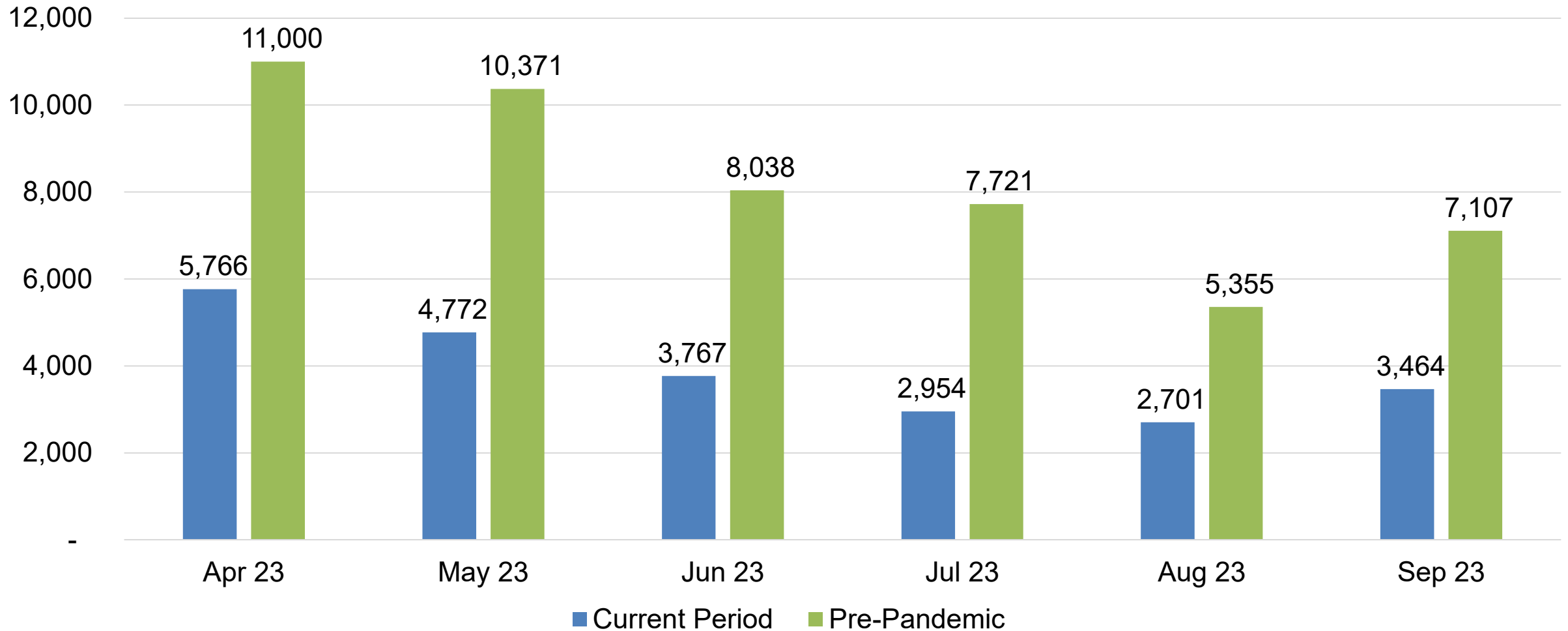
## Australia: Top destinations vs. growth

No. of visits: 2023 (000s)



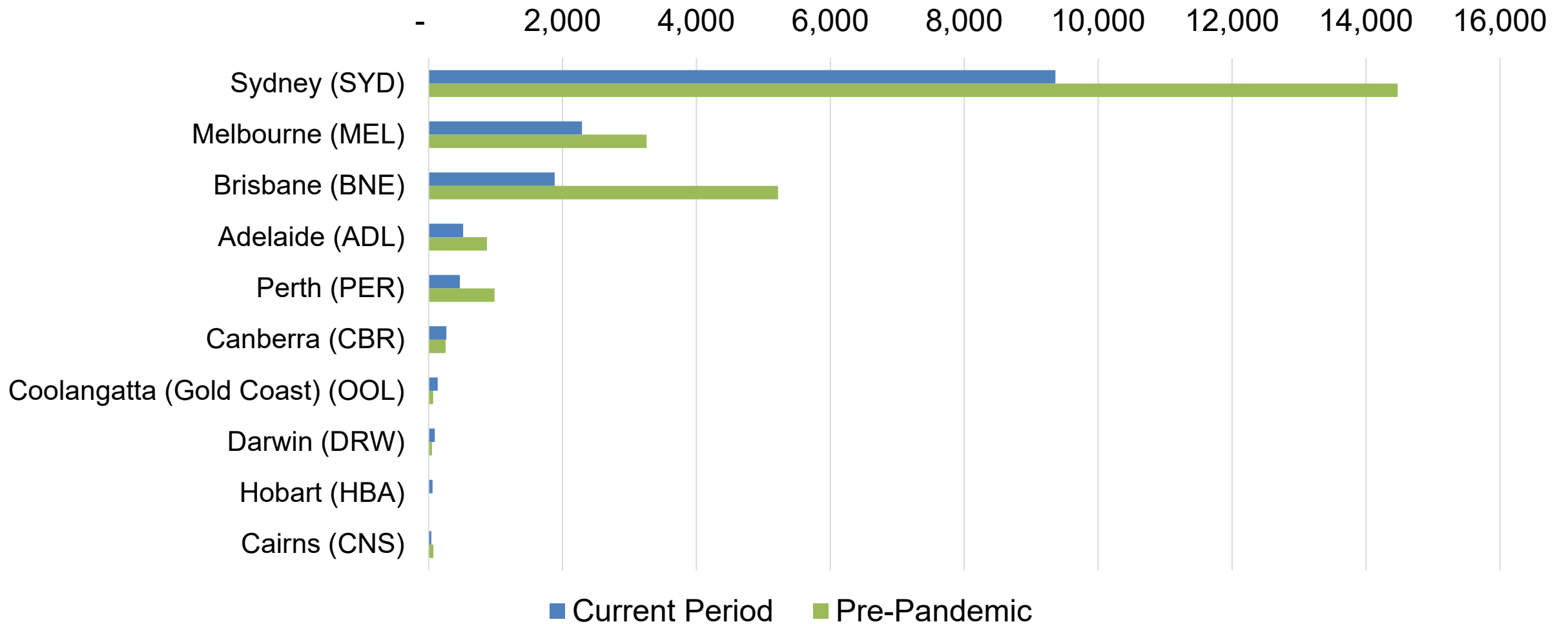
Source: Tourism Economics, Global Travel Country Profile – Australia, March 2023

# Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

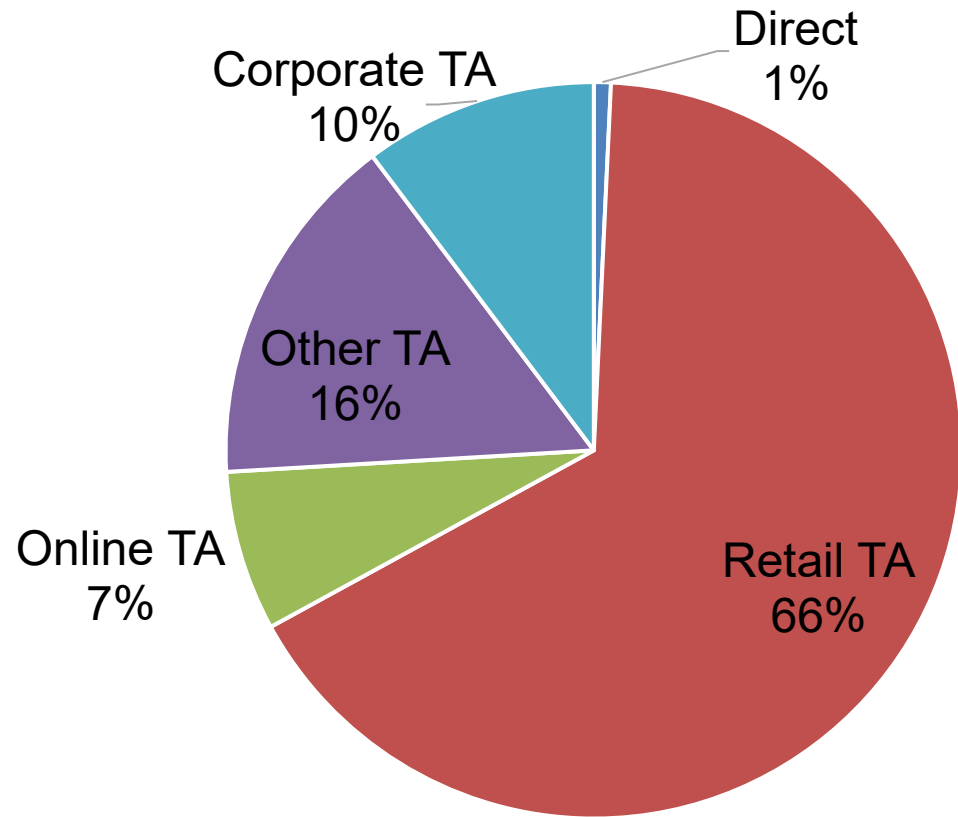
# Trip Origins: Australia



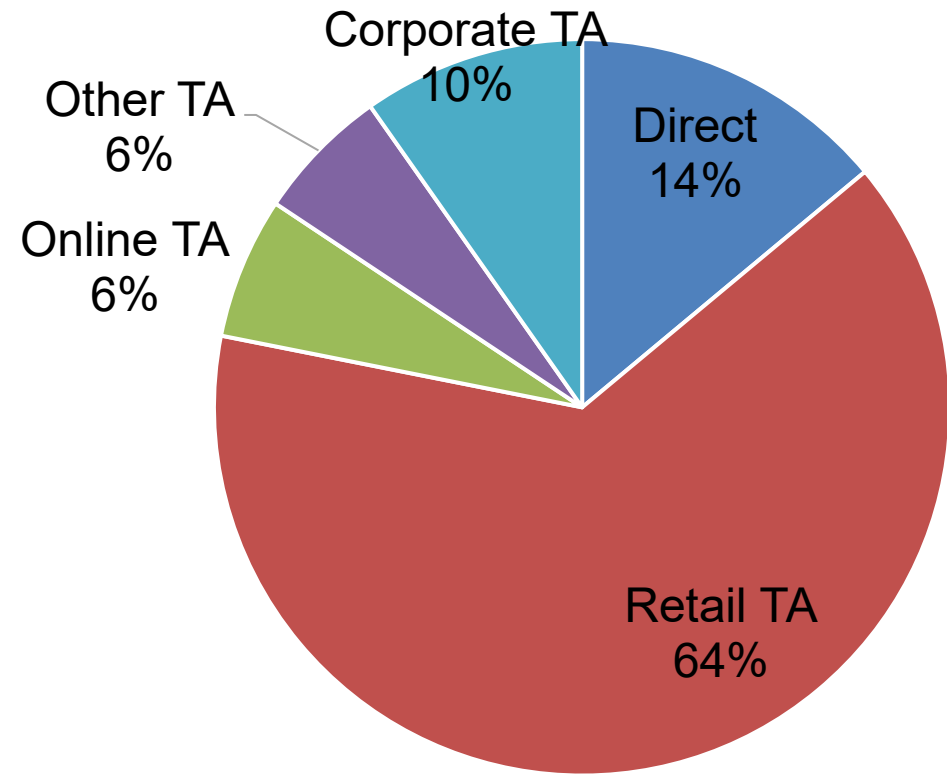
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Distribution Channel: Australia

## Pre-Pandemic



## Current Period

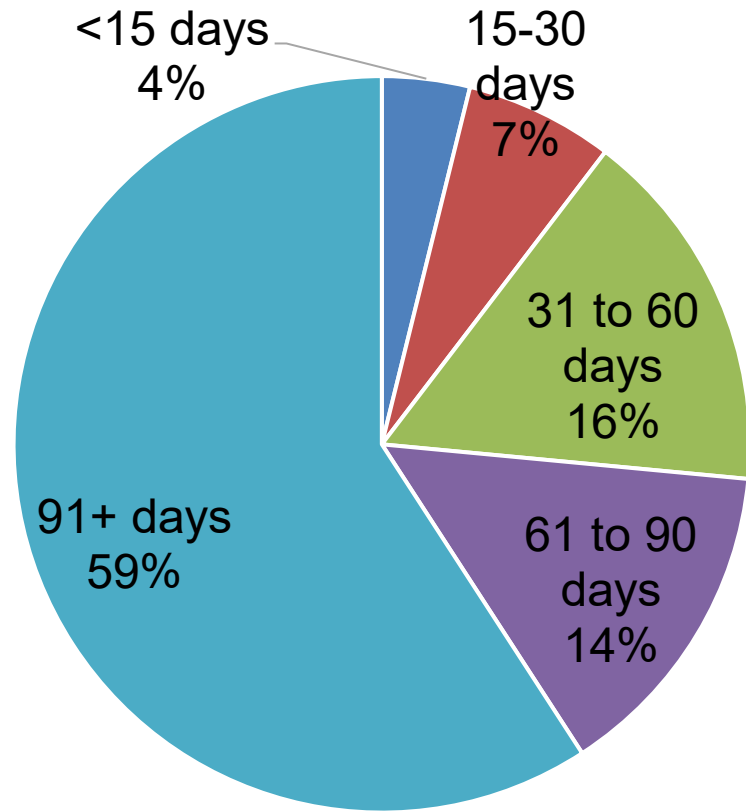


Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

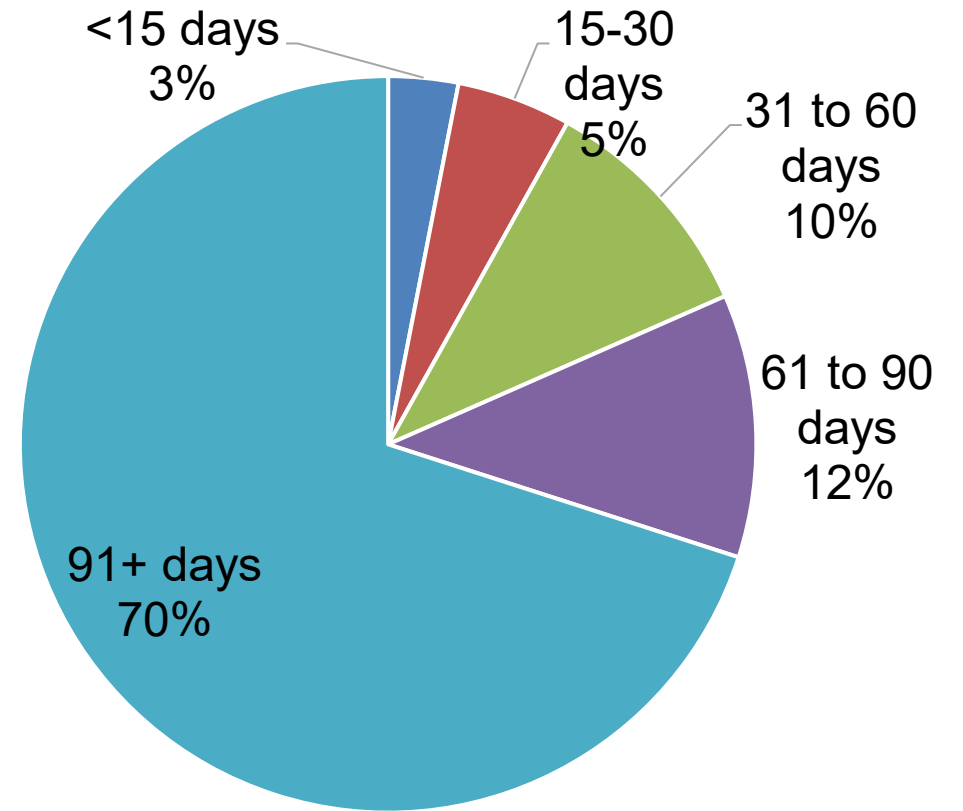


# Lead Time: Australia

## Pre-Pandemic



## Current Period



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

# Tourism Economics: China Snapshot

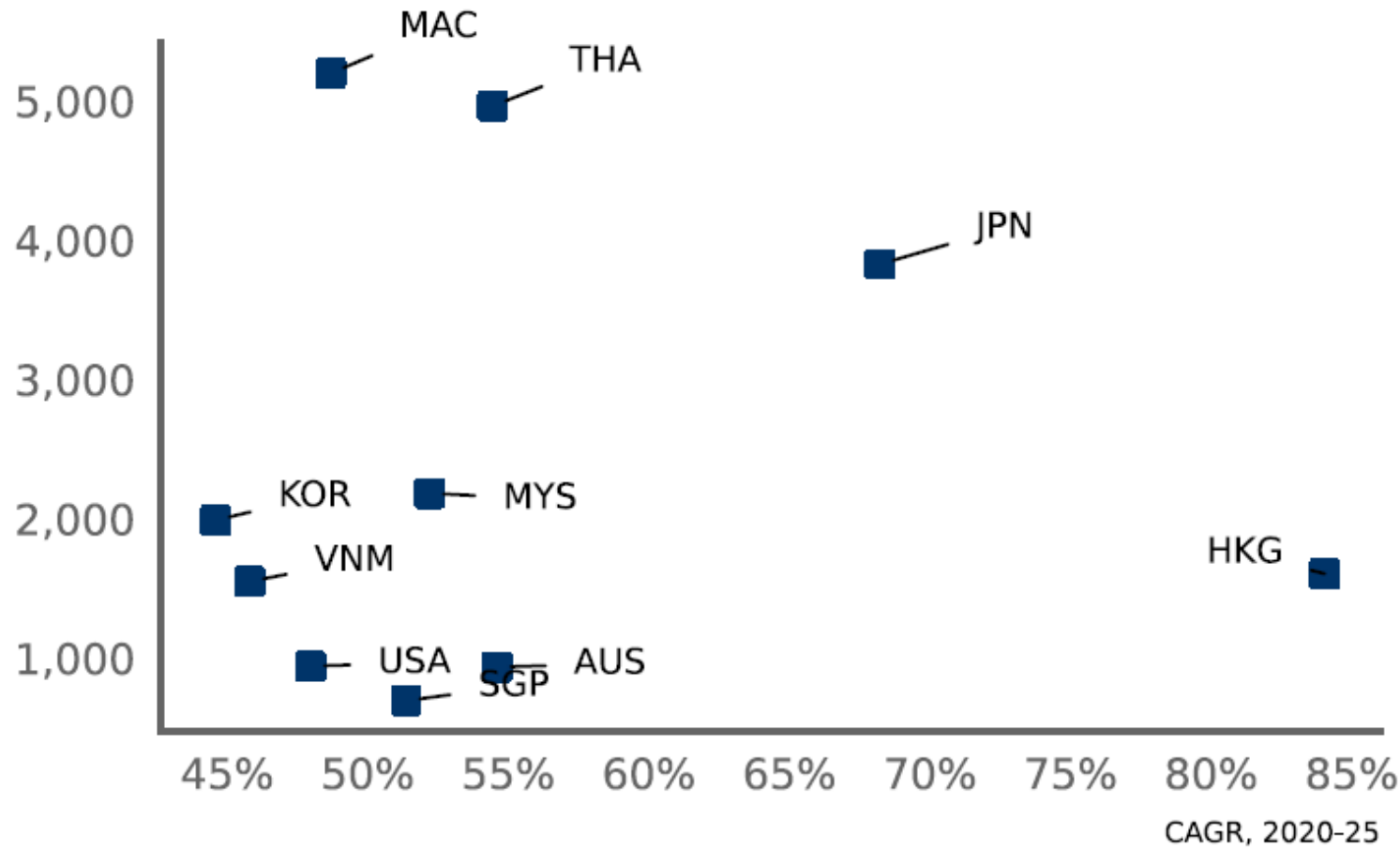
	2020	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
<b>Drivers</b>						
GDP per capita (real, US\$)	9,584.8	3.9%	4.1%	3.8%	5.6%	4.7%
Population, total (mns)	1425.2	0.1%	0.0%	-0.1%	-0.1%	-0.1%
Employment, total (mns)	759.7	-0.6%	-0.6%	0.2%	0.4%	0.4%
% middle class households	30%	31%	33%	35%	37%	39%
Weighted average exchange rate index	121.6	6%	-0%	-3%	4%	4%
<b>Departures</b>						
Departures (000s)	9,380.9	-49.4%	58.0%	154.3%	131.3%	48.9%
Destinations per trip*	1.7	1.7	1.7	1.7	1.7	1.7
Average length of stay per destination*	3.5	2.7	3.8	3.8	3.4	3.3
Average spend per trip (nom., US\$)	11,547.1	44.3%	-33.1%	-58.3%	-3.1%	-0.0%
Total business spend (nom., US\$ bns)	17.7	1.0%	-38.5%	95.2%	143.7%	53.3%
Total leisure spend (nom., US\$ bns)	90.6	-32.4%	18.5%	-7.3%	118.0%	47.3%

Source: Tourism Economics, Global Travel Country Profile – China, March 2023

# Tourism Economics: China Destinations

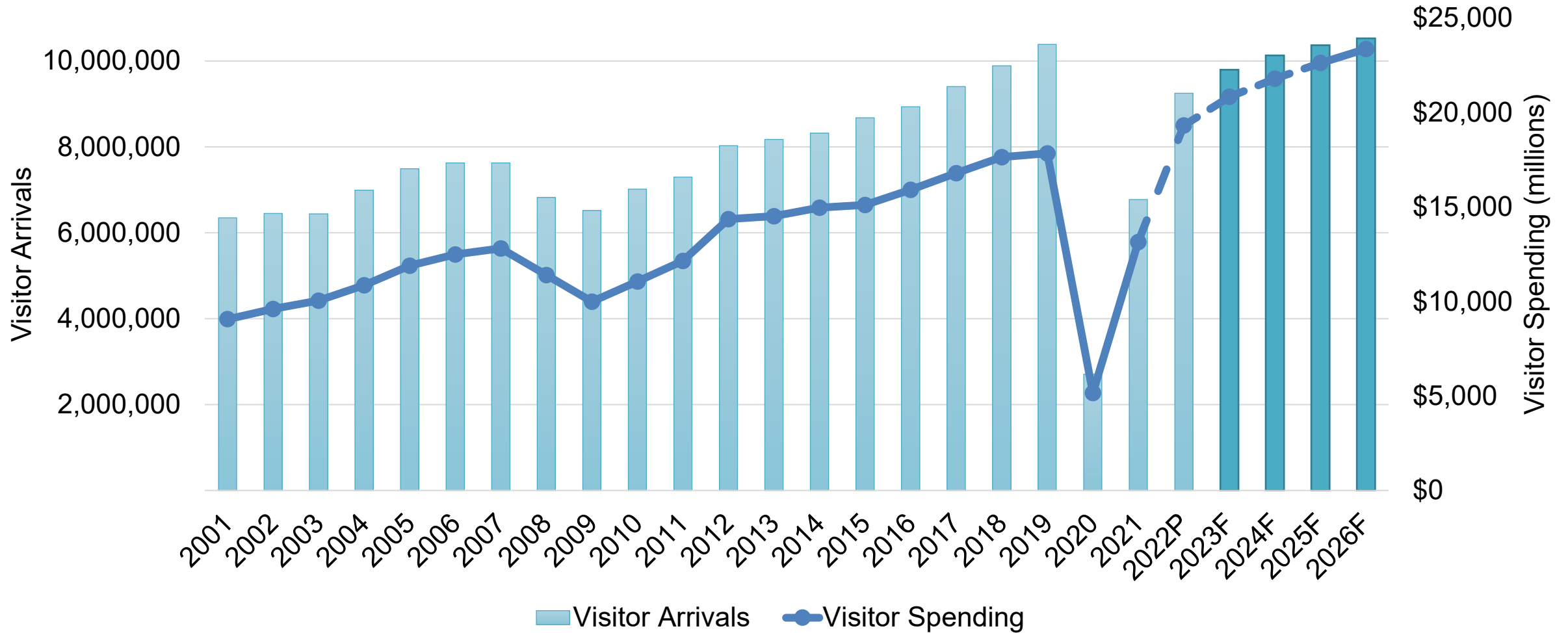
## China: Top destinations vs. growth

No. of visits: 2023 (000s)



Source: Tourism Economics, Global Travel Country Profile – China, March 2023

# DBEDT Tourism Forecast

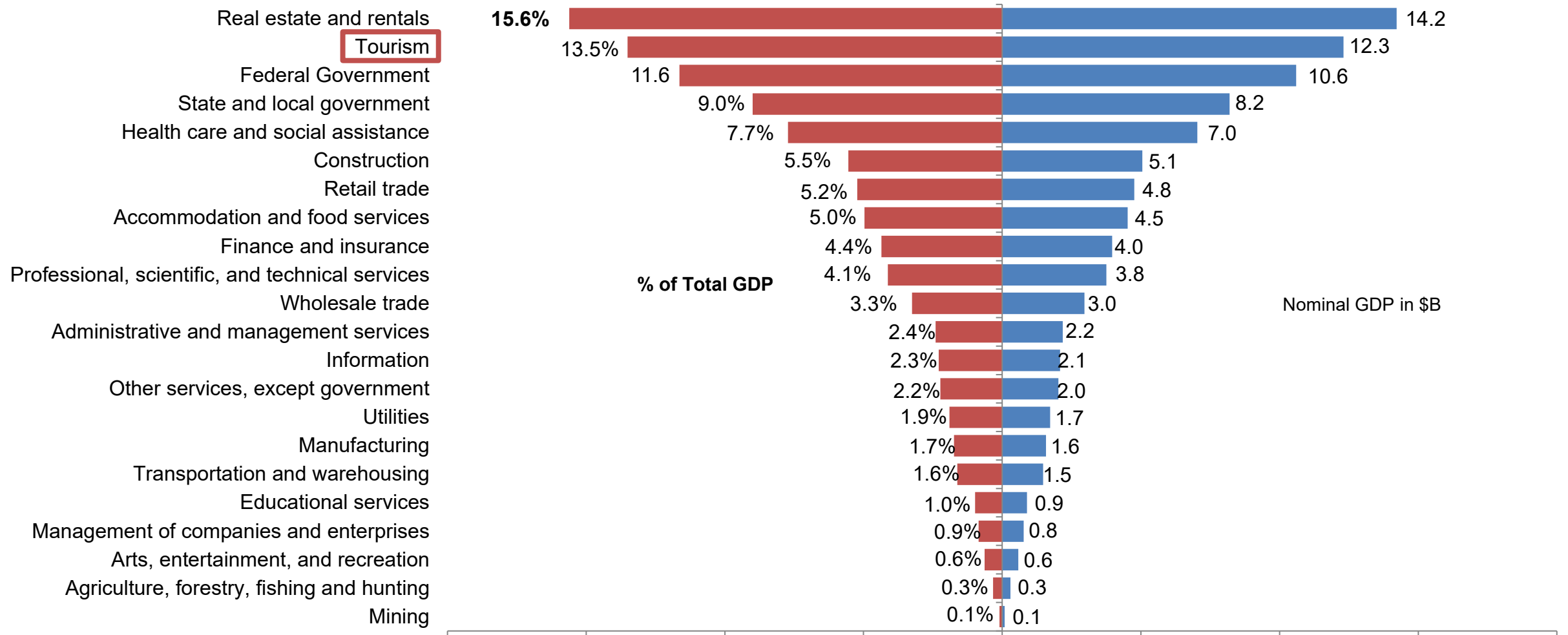


Source: DBEDT, Q1 2023 Forecast

# MAHALO!

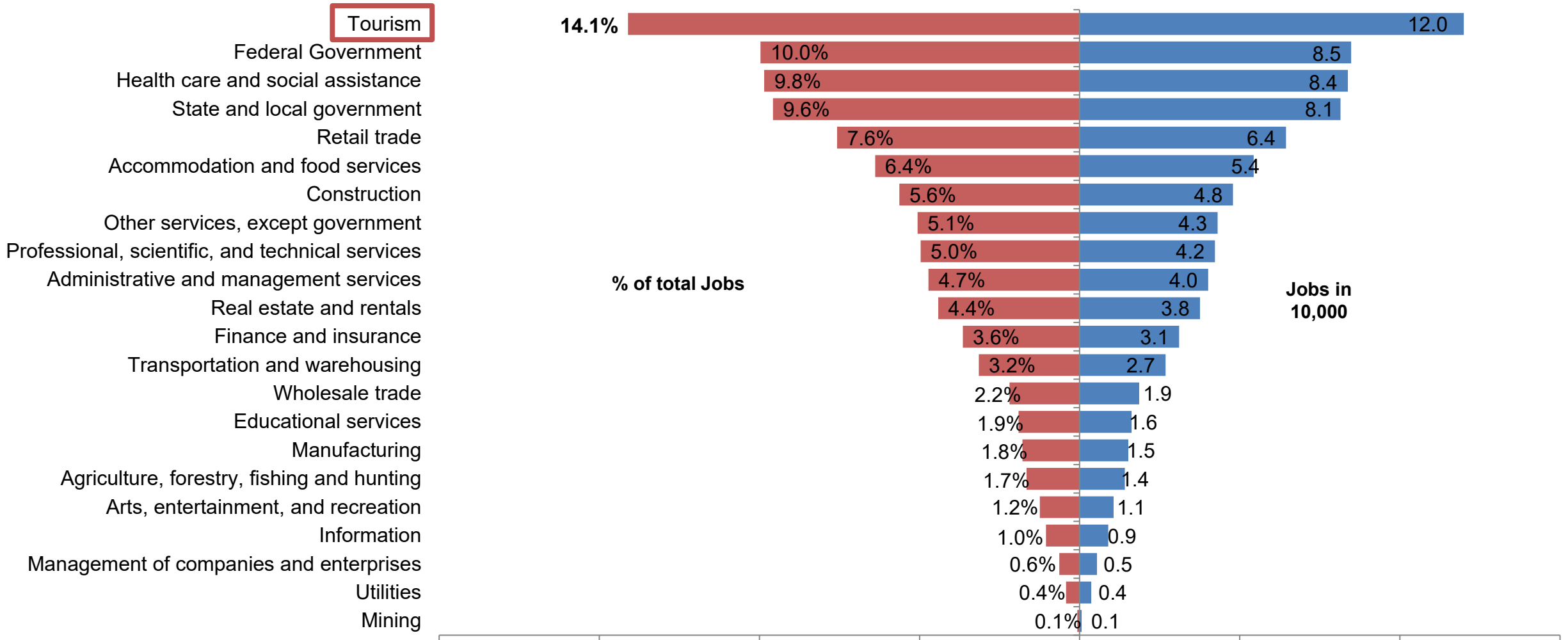


# Hawaii GDP by Industry: 2021 (in current dollars)



Source: DBEDT *GDP generated in the other sectors by tourism have been subtracted from each industry's measure.*

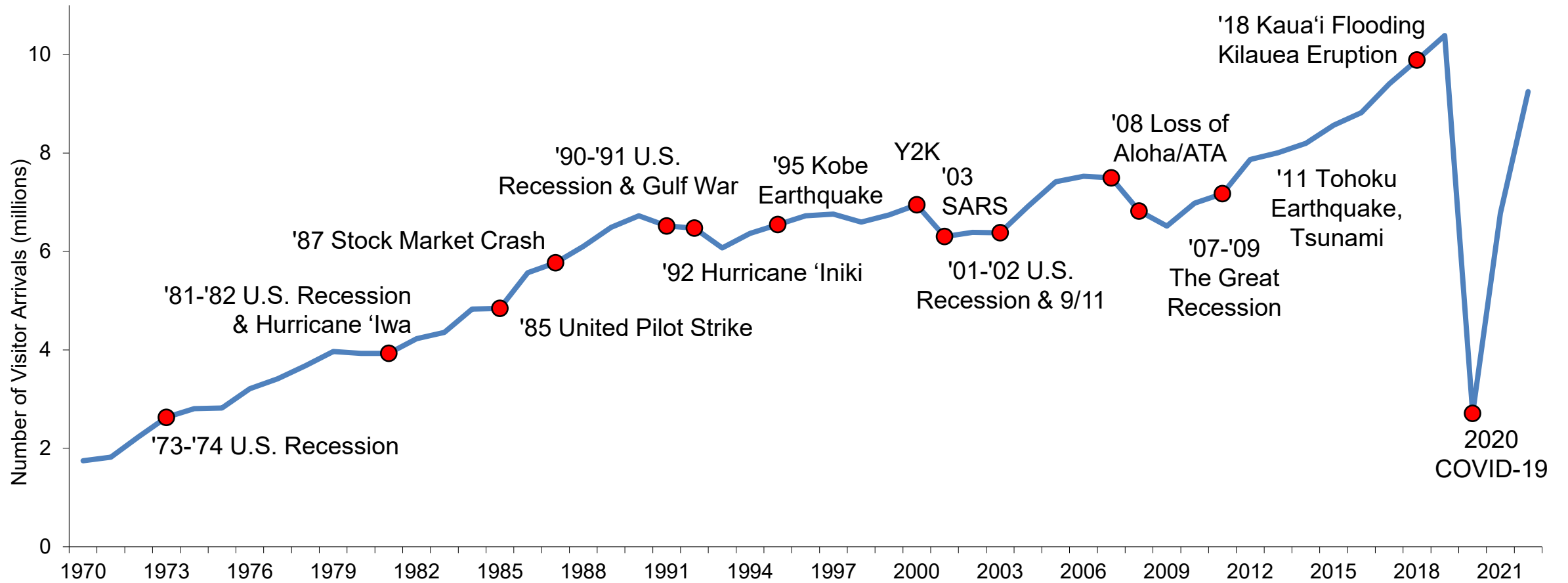
# Hawaii Jobs by Industry: 2021 (Includes payroll jobs and proprietors)



Source: DBEDT *Jobs generated in the other sectors by tourism have been subtracted from each industry's measure*

# Historical Visitor Arrivals

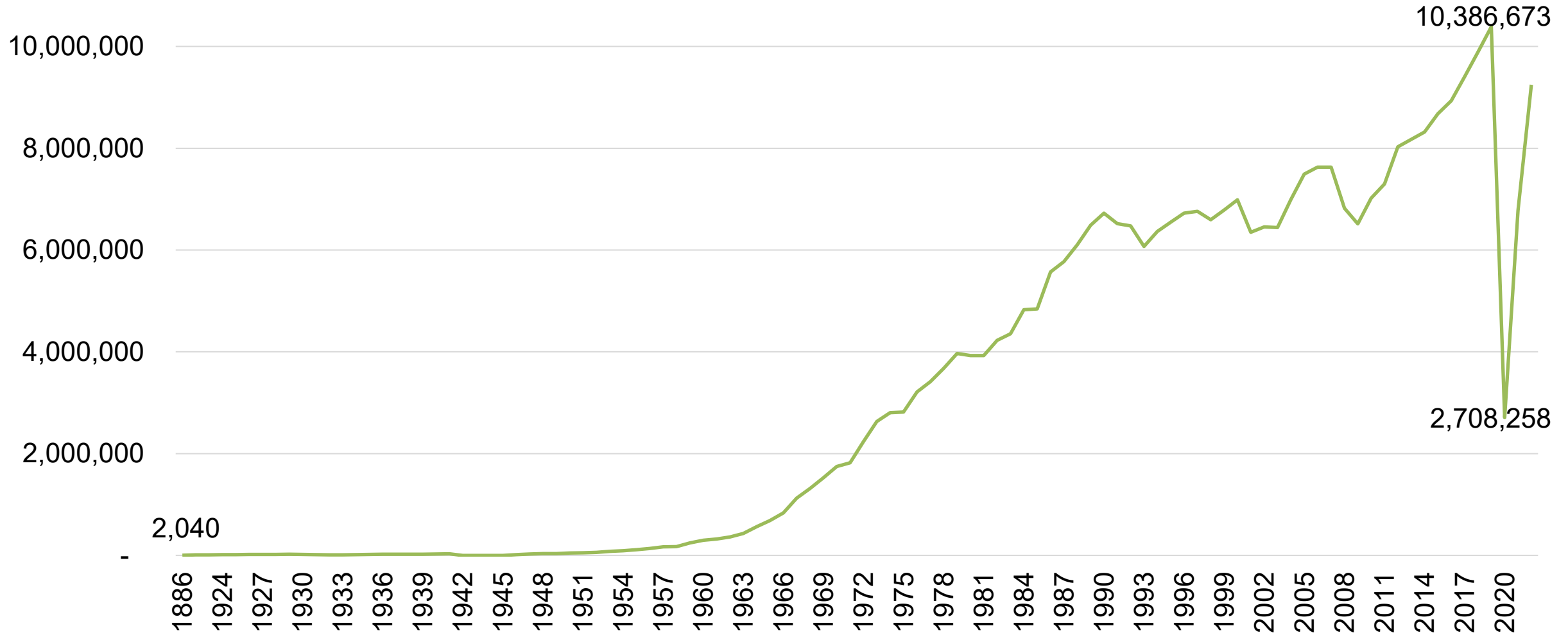
**Visitor Arrivals to the State of Hawai'i 1970 - 2022**



2022 data are preliminary.

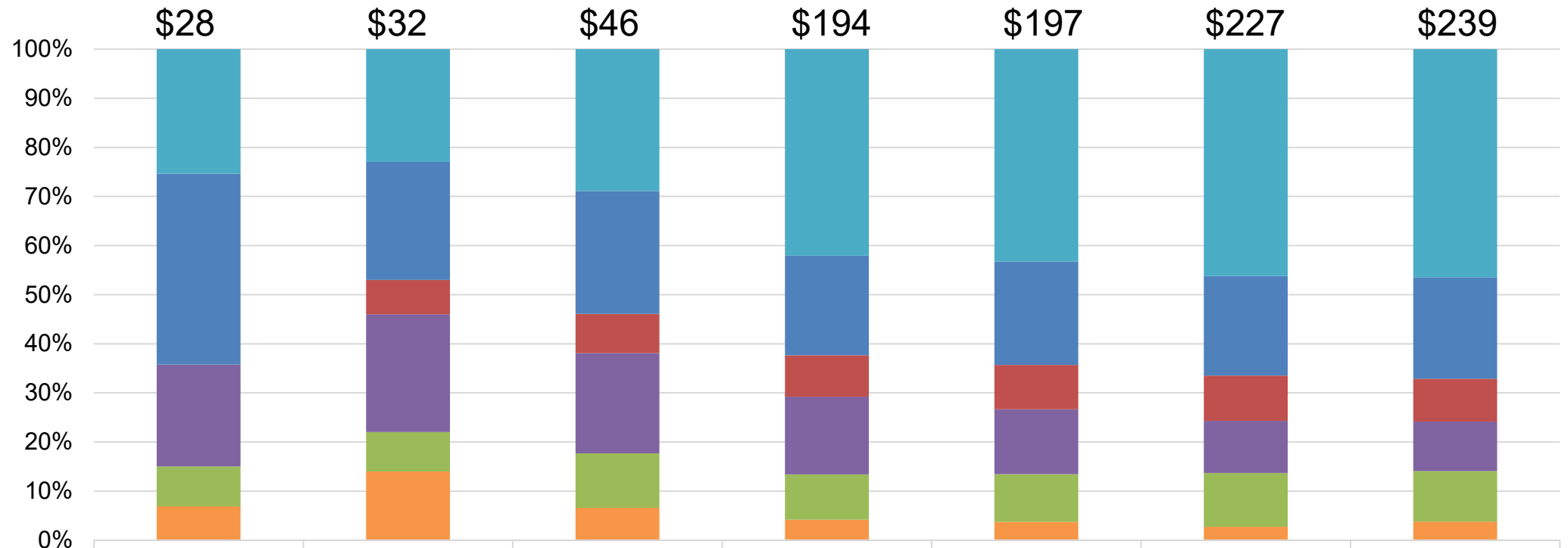


# Historical Visitor Arrivals



2022 data are preliminary.

# Per Person Per Day Spending by Category



	1951	1960-1961	1974	2013	2019	2022P	2023 YTD
■ Lodging	25.4%	23.0%	28.9%	42.1%	43.3%	46.2%	46.4%
■ Total Food and Beverage	38.8%	24.0%	25.0%	20.3%	21.0%	20.3%	20.7%
■ Entertainment & Recreation	0.0%	7.0%	8.0%	8.4%	9.0%	9.3%	8.7%
■ Total Shopping	20.8%	24.0%	20.4%	15.8%	13.2%	10.6%	10.0%
■ Total Transportation	8.1%	8.0%	11.1%	9.2%	9.8%	11.0%	10.3%
■ All other expenses	6.9%	14.0%	6.6%	4.2%	3.7%	2.7%	3.8%

2022 and 2023 data are preliminary