

HTA REGULAR BOARD MEETING

Thursday, March 30, 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

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Director of Tourism Research

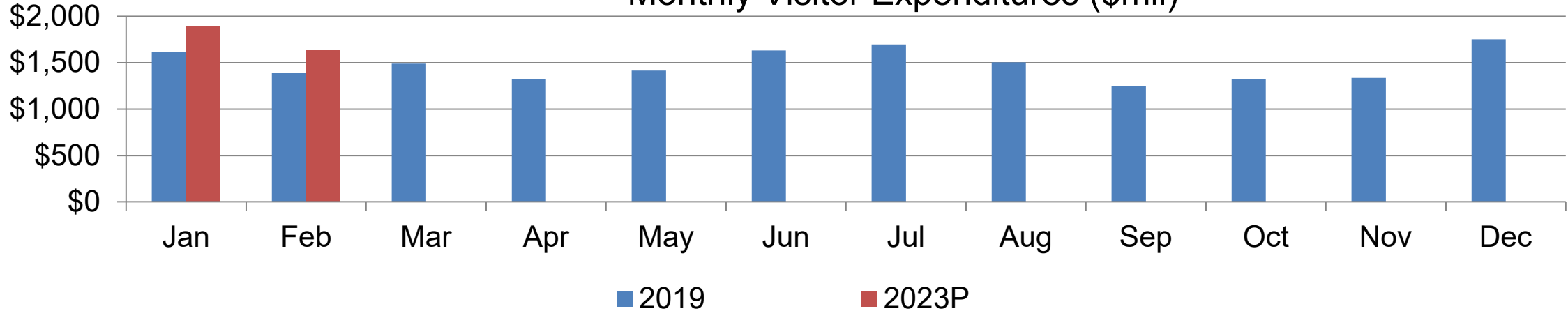
HAWAII TOURISM
AUTHORITY

The logo for the Department of Business, Economic Development & Tourism (DBEDT) features a stylized blue wave graphic 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.

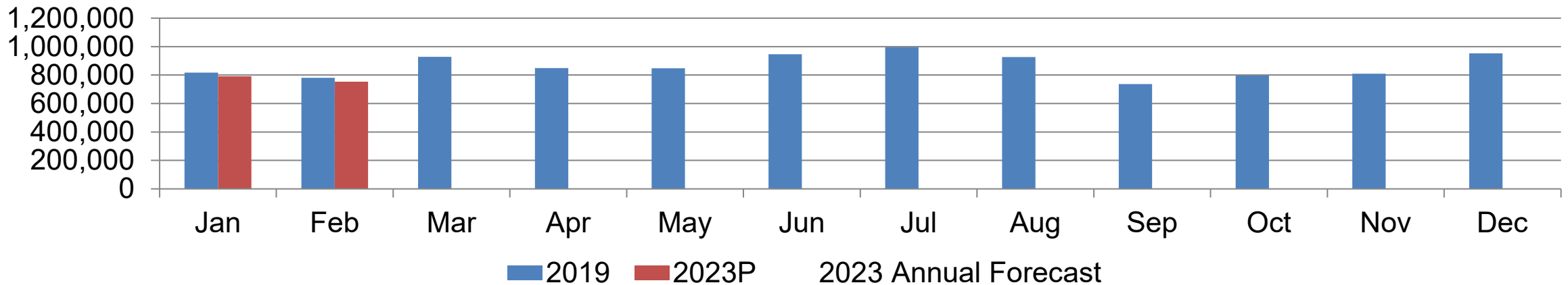
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

February 2023 Highlights – Expenditures and Arrivals

Monthly Visitor Expenditures (\$mil)



Monthly Arrivals



2023 Annual Forecast

Note: 2022 and 2023 figures are preliminary.

February 2023 Highlights by Market

EXPENDITURES (\$mil.)	2023P	2022P	2019
TOTAL (AIR)	1,628.5	1,307.3	1,383.3
U.S. West	739.7	728.3	499.7
U.S. East	524.1	437.1	371.6
Japan	43.7	8.1	165.5
Canada	147.2	78.7	153.0
All Others	173.8	55.2	193.5

PPPD SPENDING (\$)	2023P	2022P	2019
TOTAL (AIR)	241.6	222.4	202.1
U.S. West	228.7	227.0	184.2
U.S. East	259.8	233.8	209.1
Japan	236.7	201.5	242.2
Canada	227.0	178.2	183.8
All Others	265.1	172.6	230.8

VISITOR ARRIVALS	2023P	2022P	2019
TOTAL (AIR)	733,640	623,691	764,513
U.S. West	378,902	376,761	312,235
U.S. East	203,163	186,758	176,777
Japan	26,650	2,181	120,653
Canada	54,860	29,046	66,590
All Others	70,065	28,945	88,258

AVERAGE DAILY CENSUS	2023P	2022P	2019
TOTAL (AIR)	240,746	209,968	244,420
U.S. West	115,517	114,594	96,870
U.S. East	72,055	66,760	63,462
Japan	6,596	1,431	24,408
Canada	23,164	15,768	29,741
All Others	23,414	11,415	29,939

Note: 2022 and 2023 figures are preliminary.

February 2023 Highlights by Island

EXPENDITURES (\$mil.)	2023P	2022P	2019
O'ahu	626.6	540.1	609.0
Maui	540.1	402.8	413.2
Moloka'i	2.7	3.0	3.3
Lāna'i	11.2	13.0	12.7
Kaua'i	203.8	149.3	152.8
Hawai'i Island	244.1	199.1	192.3

PPPD SPENDING (\$)	2023P	2022P	2019
O'ahu	212.1	233.8	198.6
Maui	290.8	235.0	220.1
Moloka'i	126.5	143.9	125.1
Lāna'i	506.3	588.8	579.1
Kaua'i	264.9	205.6	193.0
Hawai'i Island	218.8	183.4	181.3

VISITOR ARRIVALS	2023P	2022P	2019
O'ahu	411,903	308,705	454,687
Maui	220,741	193,232	221,603
Moloka'i	3,255	3,240	5,542
Lāna'i	5,046	4,814	6,208
Kaua'i	100,525	88,428	104,445
Hawai'i Island	137,444	122,480	138,387

AVERAGE DAILY CENSUS	2023P	2022P	2019
O'ahu	105,534	82,507	109,506
Maui	66,332	61,218	67,040
Moloka'i	770	739	938
Lāna'i	792	791	781
Kaua'i	27,473	25,932	28,271
Hawai'i Island	39,845	38,781	37,883

Note: 2023 and 2022 figures are preliminary.

February 2023 Highlights - Hawai'i Airport Throughput

Throughput by Week

State: Hawaii; Airport: All



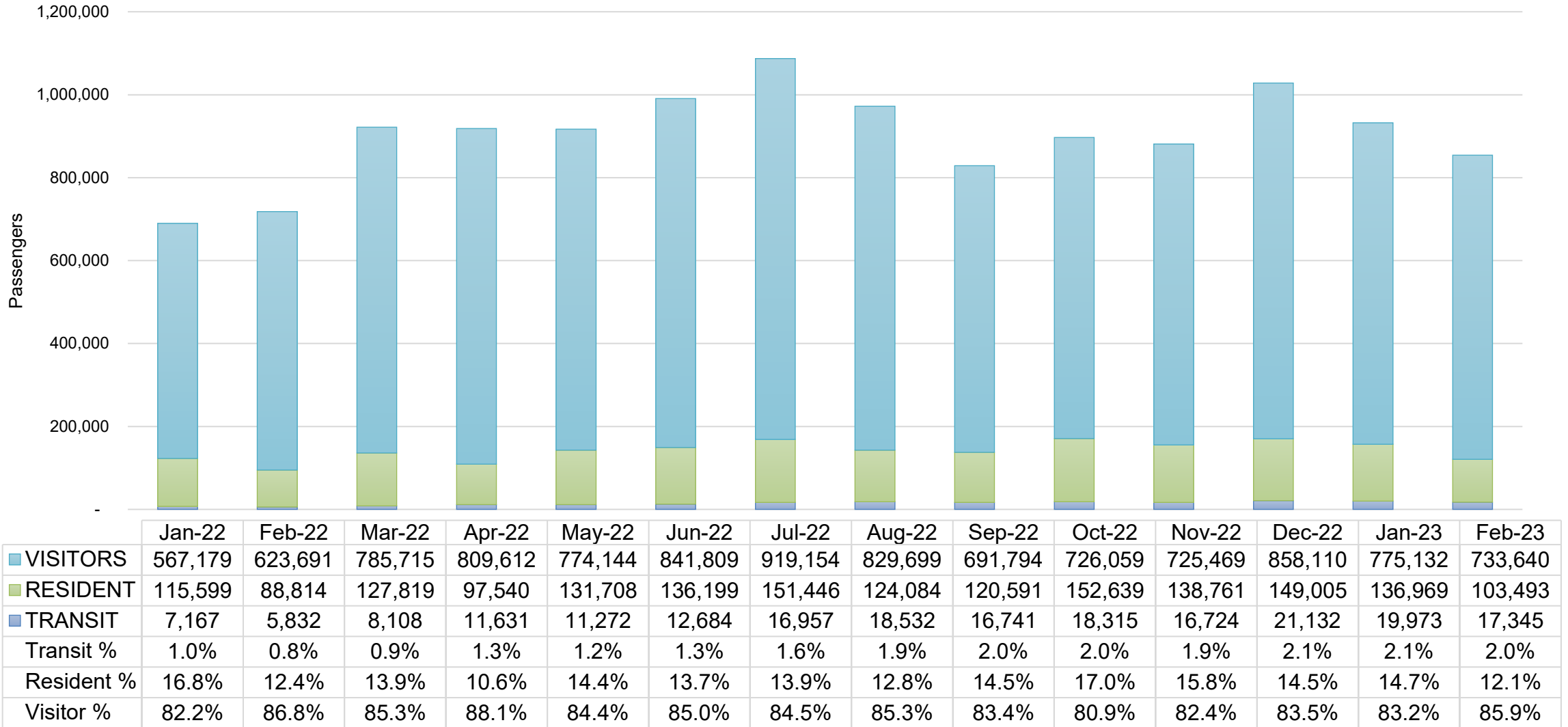
Hawaii Airports

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

	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23
Daniel K. Inouye International Airport	-16%	-12%	-13%	-9%	-6%	-8%
Kahului	3%	4%	2%	0%	6%	6%
Ellison Onizuka Kona International Airport	3%	4%	-2%	-1%	8%	8%
Lihue	12%	16%	9%	4%	4%	7%
Hilo International	14%	18%	16%	16%	20%	14%

Source: TSA by Tourism Economics

Airline Passengers Mix



Source: DBEDT, Airline Carrier Reports

February 2023 Highlights – Purpose of Trip

PURPOSE OF TRIP - % Total	Total by Air		US West		US East		Japan		Canada	
	2023P	2019	2023P	2019	2023P	2019	2023P	2019	2023P	2019
	Pleasure (Net)	83.5%	82.8%	83.5%	82.4%	79.6%	78.2%	86.9%	82.4%	92.3%
Honeymoon/Get Married	3.5%	4.9%	2.3%	2.4%	3.5%	3.6%	14.3%	13.1%	2.0%	2.7%
Honeymoon	2.9%	4.3%	1.8%	1.8%	3.0%	2.8%	13.9%	12.5%	1.7%	2.6%
Get Married	0.8%	0.9%	0.6%	0.7%	0.7%	1.0%	1.8%	1.9%	0.4%	0.1%
Pleasure/Vacation	80.6%	78.5%	81.8%	80.6%	76.8%	75.2%	74.5%	70.3%	90.5%	91.7%
Mtgs/Conventions/Incentive	4.6%	7.4%	3.4%	5.9%	6.1%	10.4%	5.3%	9.1%	5.7%	5.5%
Conventions	2.3%	4.0%	1.9%	3.7%	3.2%	6.7%	1.0%	1.6%	2.4%	3.4%
Corporate Meetings	1.1%	1.2%	1.0%	1.5%	1.5%	1.9%	0.3%	0.2%	0.8%	0.7%
Incentive	1.3%	2.4%	0.7%	1.0%	1.6%	2.2%	4.0%	7.4%	2.7%	1.5%
Other Business	2.9%	2.9%	3.3%	4.2%	3.6%	3.9%	0.7%	0.5%	0.6%	0.8%
Visit Friends/Rel.	10.8%	7.9%	12.0%	10.8%	12.4%	10.7%	3.5%	1.7%	3.5%	3.1%
Gov't/Military	1.2%	1.4%	0.8%	1.0%	2.5%	2.5%	0.6%	0.0%	0.1%	0.1%
Attend School	0.1%	0.3%	0.1%	0.1%	0.1%	0.3%	1.0%	0.5%	0.0%	0.1%
Sport Events	0.5%	0.6%	0.7%	0.7%	0.5%	0.6%	0.2%	0.6%	0.2%	0.5%
Other	3.0%	3.9%	3.0%	3.1%	3.2%	3.2%	7.4%	9.5%	1.6%	1.0%

Note: 2023 figures are preliminary.

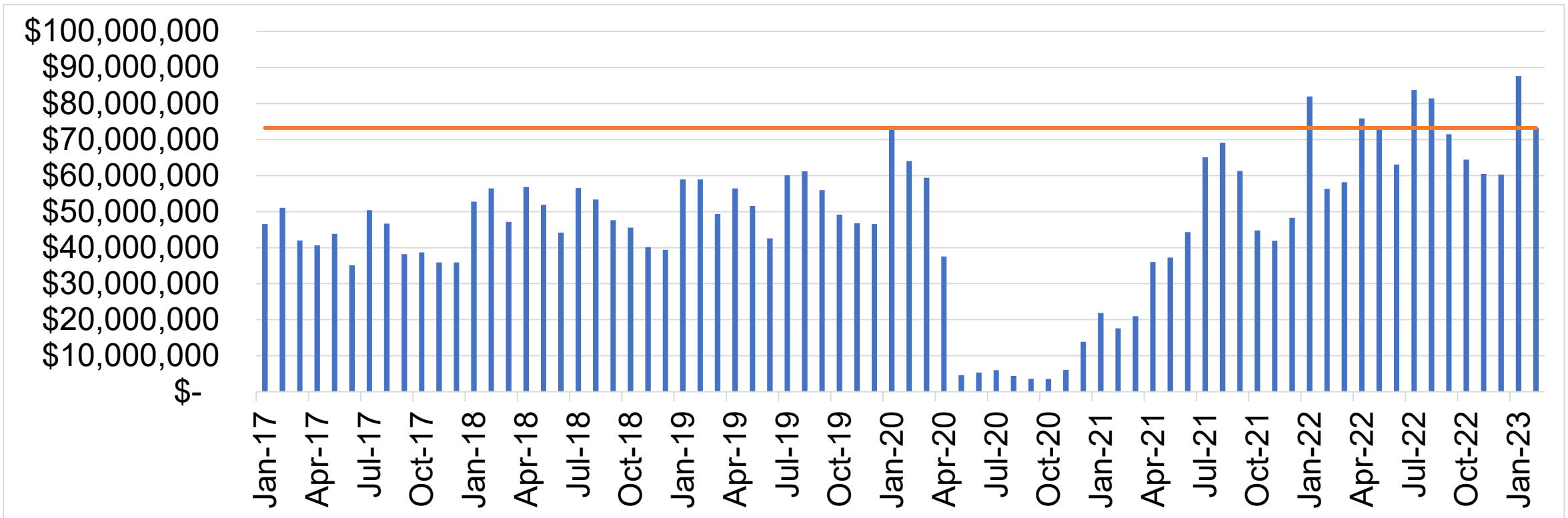
February 2023 Highlights – Accommodation Choice

ACCOMMODATIONS - % Total	Total by Air		US West		US East		Japan		Canada	
	2023P	2019	2023P	2019	2023P	2019	2023P	2019	2023P	2019
Plan to stay in Hotel	56.2%	59.3%	51.3%	49.5%	58.1%	56.8%	71.6%	86.7%	52.9%	42.4%
Plan to stay in Condo	16.1%	16.5%	17.4%	18.7%	13.9%	15.1%	16.5%	10.4%	24.7%	31.1%
Plan to stay in Timeshare	8.1%	7.4%	8.2%	9.0%	8.4%	9.1%	11.4%	4.4%	9.7%	8.7%
Cruise Ship	1.2%	1.3%	0.6%	0.7%	2.7%	3.3%	0.2%	0.3%	0.7%	1.2%
Friends/Relatives	12.3%	9.6%	13.7%	12.6%	14.1%	12.6%	3.2%	1.2%	6.0%	4.7%
Bed & Breakfast	1.2%	1.4%	1.0%	1.3%	1.2%	1.7%	0.1%	0.2%	1.1%	2.2%
Rental House	10.8%	11.0%	12.3%	14.0%	11.3%	11.3%	0.5%	0.3%	10.0%	17.8%
Hostel	0.9%	1.2%	0.6%	0.8%	0.7%	0.9%	0.2%	0.2%	1.3%	2.3%
Camp Site, Beach	0.8%	0.8%	0.8%	0.8%	0.8%	0.8%	0.2%	0.1%	1.9%	2.4%
Private Room in Private Home**	1.6%	2.0%	1.0%	1.7%	1.0%	1.9%	0.3%	0.2%	2.7%	3.2%
Shared Room/Space in Private Home**	0.3%	0.6%	0.3%	0.6%	0.4%	0.6%	0.2%	0.2%	0.3%	0.5%
Other	1.7%	1.4%	1.8%	2.0%	1.9%	1.8%	0.7%	0.0%	1.3%	1.2%

Note: 2022 figures are preliminary.

February 2023 Highlights – TAT Collections

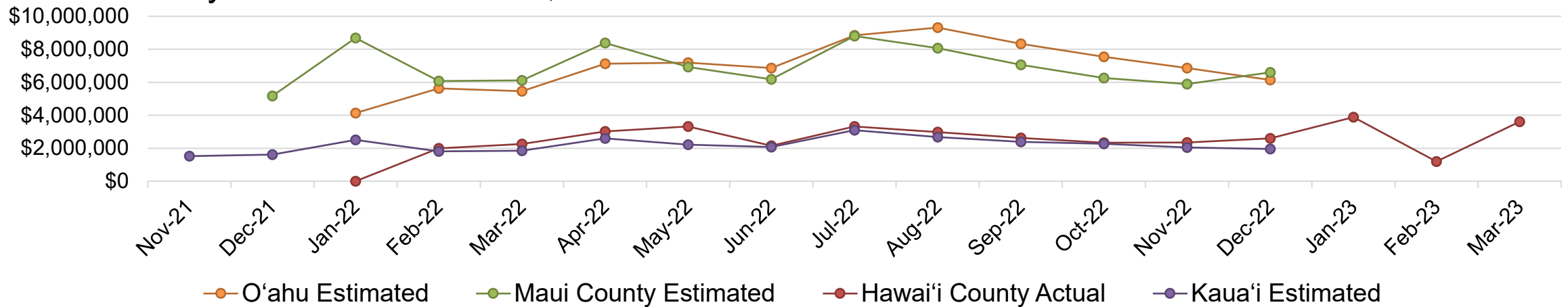
- Preliminary January TAT Collections: \$73.2 million
- Preliminary YTD Fiscal 23 TAT Collections: \$582.7 million (+24.3%)
- YTD Fiscal 22 TAT Collections: \$468.7 million (+\$114.0 million)



Source: Department of Taxation

Update: County TAT Collections

- Director Sadayasu sent letters to mayors
 - County of Hawai'i sent data
- County-level collections for O'ahu, Maui County, and Kaua'i estimated based on DoTAX Tax Base for Tax Liabilities by Month
 - Assumes collection in the month following (January tax liability collected in February)
- Effective Dates
 - City & County of Honolulu: December 14, 2021
 - County of Maui: November 1, 2021
 - County of Hawai'i: January 1, 2022
 - County of Kaua'i: October 1, 2021



Source: DBEDT estimates based on Department of Taxation data, County of Hawai'i

February 2023 Highlights - Lodging

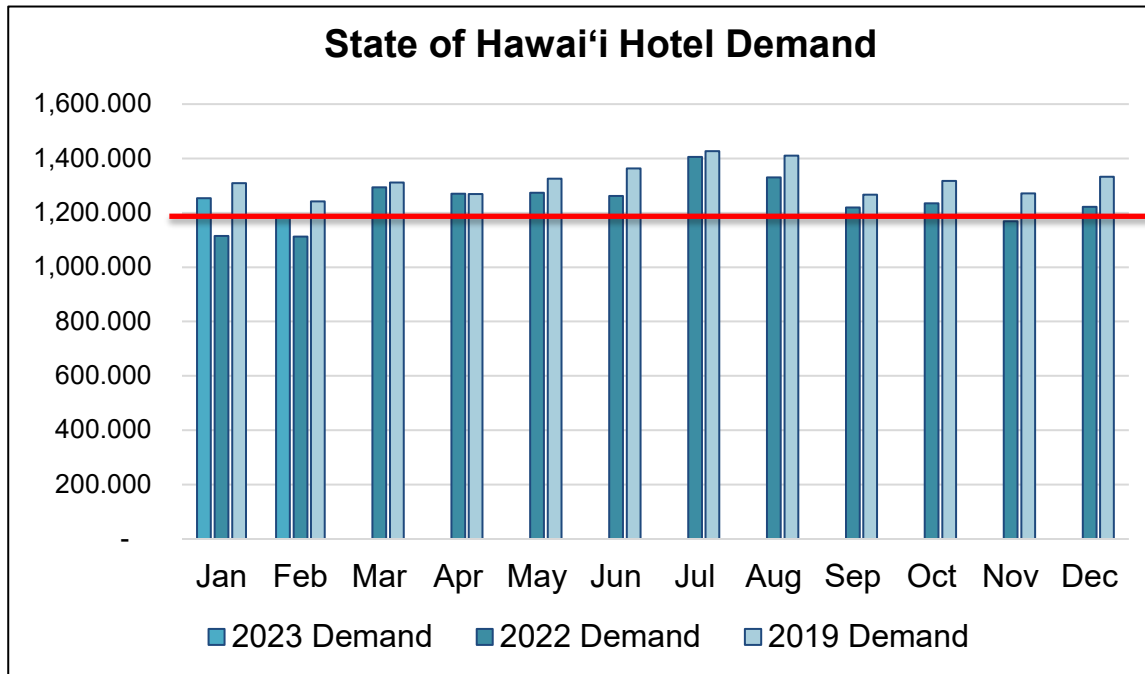
State of Hawai'i Hotel Performance

	2023	2022	2019
Occupancy	76.3%	71.6%	83.5%
ADR	\$387	\$354	\$292
RevPAR	\$296	\$253	\$243

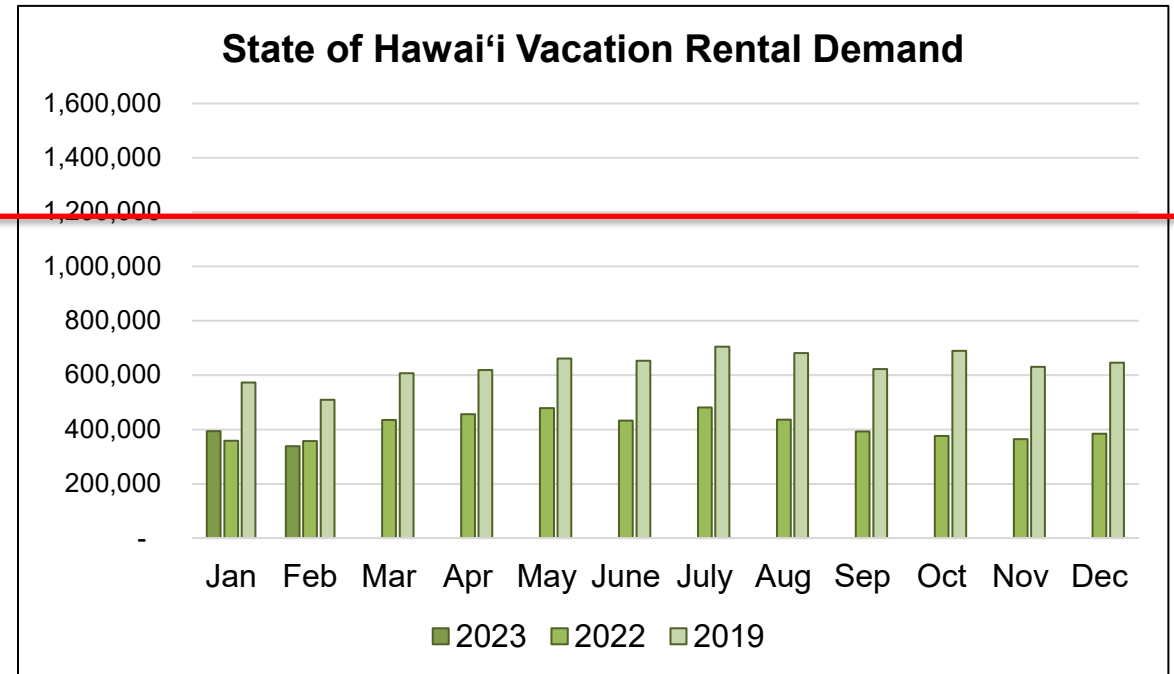
State of Hawai'i Vacation Rental Performance

	2023	2022	2019
Occupancy	66.5%	73.1%	82.3%
ADR	\$333	\$296	\$217

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 Hawai'i by Port Entry

February	Total			Domestic			International		
	2023	2022	2019	2023	2022	2019	2023	2022	2019
STATE	1,029,278	938,360	1,010,961	835,419	841,137	684,814	193,859	97,223	326,147
HONOLULU	597,554	489,945	623,905	440,433	427,164	350,740	157,121	62,781	273,165
KAHULUI	252,522	263,174	203,561	226,840	237,914	173,794	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	73,566	82,301	76,697	70,086	78,647	69,797	3,480	3,654	6,900

March	Total			Domestic			International		
	2023	2022	2019	2023	2022	2019	2023	2022	2019
STATE	1,220,619	1,159,954	1,183,596	999,665	1,029,748	834,753	220,954	130,206	348,843
HONOLULU	685,010	590,706	711,281	506,234	509,436	420,930	178,776	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
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 March 30, 2023, subject to change

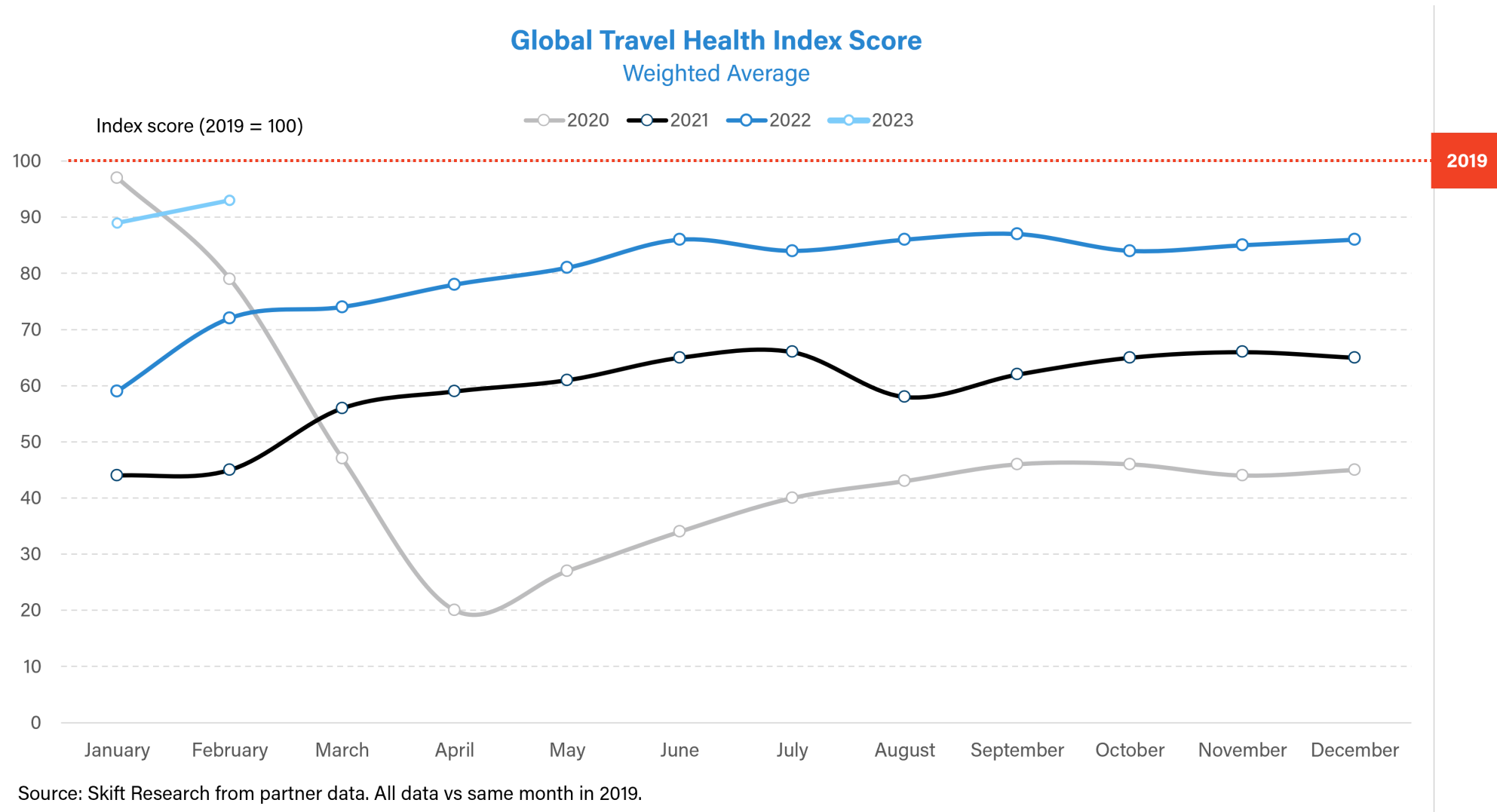
Scheduled Nonstop Seats to Hawai'i by Port Entry

April	Total			Domestic			International		
	2023	2022	2019	2023	2022	2019	2023	2022	2019
STATE	1,101,582	1,083,288	1,097,017	903,609	951,005	775,912	197,973	132,283	321,105
HONOLULU	640,564	572,849	668,776	468,884	478,716	393,666	171,680	94,133	275,110
KAHULUI	261,715	291,261	241,065	240,866	263,491	213,772	20,849	27,770	27,293
KONA	109,342	116,149	103,121	105,290	109,771	89,117	4,052	6,378	14,004
HILO	0	2,887	3,873	0	2,887	3,873	0	0	0
LIHU'E	89,961	100,142	80,182	88,569	96,140	75,484	1,392	4,002	4,698

May	Total			Domestic			International		
	2023	2022	2019	2023	2022	2019	2023	2022	2019
STATE	1,083,871	1,037,533	1,104,245	905,537	942,466	814,220	178,334	95,067	290,025
HONOLULU	645,335	552,629	685,520	474,930	468,195	414,824	170,405	84,434	270,696
KAHULUI	244,788	265,870	228,732	236,859	255,237	219,464	7,929	10,633	9,268
KONA	106,748	116,036	106,089	106,748	116,036	96,028	0	0	10,061
HILO	0	3,183	3,938	0	3,183	3,938	0	0	0
LIHU'E	87,000	99,815	79,966	87,000	99,815	79,966	0	0	0

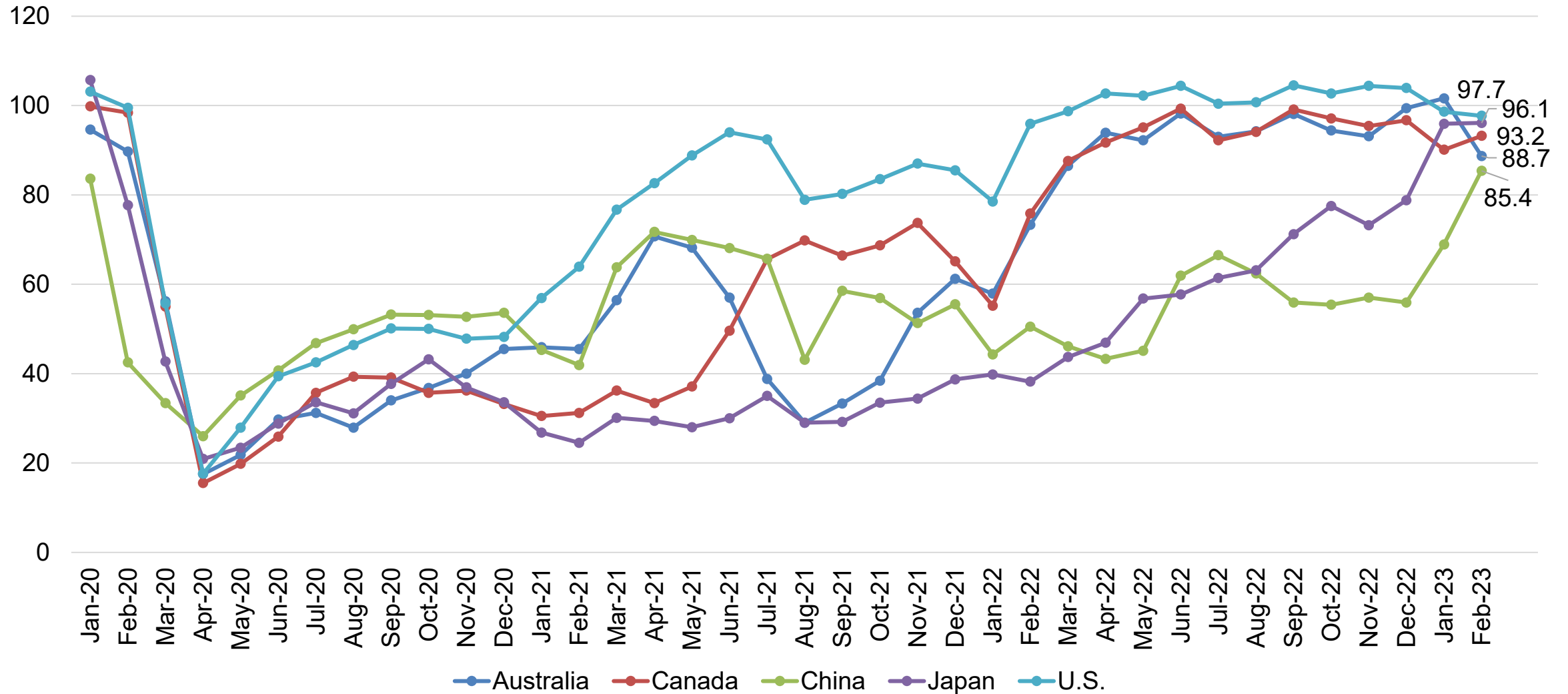
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of March 30, 2023, subject to change

Skift Travel Health Index February 2023 = 93



Source: Skift Research

Skift Travel Health Index by Country



Source: Skift Research



Travel Spending (Tourism Economics)

↗ **+3.6%**

January vs. 2019

↗ **+3.6%**

YTD vs. 2019



Air Passengers (TSA)

↗ **+3.3%**

January vs. 2019

↗ **+3.3%**

YTD vs. 2019



Overseas Arrivals (NTTO)

↘ **-33.3%**

January vs. 2019

↘ **-33.3%**

YTD vs. 2019



Hotel Demand (STR)

↗ **+0.6%**

January vs. 2019

↗ **+0.6%**

YTD vs. 2019



Short-term Rental Demand (AIRDNA)

↗ **+39.2%**

January vs. 2019

↗ **+39.2%**

YTD vs. 2019

Insights

Air passenger volume rose to its first positive reading relative to 2019 in January, registering a 3% increase.

Overseas arrivals receded to 33% below its 2019 level in January, following an uptick in December.

Hotel room demand maintained 1% growth over its 2019 benchmark in January, although group demand within the top 25 markets fell to 15% below its 2019 level from only 5% below.

Short-term rental demand grew 39% beyond its 2019 level in January, nearing its high mark from October 2022.

Travel Indicators

% change relative to same month in 2019

Travel Spending (Tourism Economics)

Auto Trips (Arrivalist)

Air Passengers (TSA)

Overseas Arrivals (NTTO)

Hotel Demand (STR)

Top 25 Group Hotel Demand* (STR)

Short-term Rental Demand (AIRDNA)

National Park Visits (National Park Service)

Organic Web Sessions (Simpleview & Tempest)*

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

	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Travel Spending (Tourism Economics)	-6%	-5%	3%	0%	1%	0%	-3%	6%	3%	1%	3%	4%
Auto Trips (Arrivalist)	-2%	-13%	6%	-2%	2%	-1%	-15%	6%	3%	-6%	-1%	
Air Passengers (TSA)	-15%	-12%	-10%	-10%	-11%	-12%	-9%	-6%	-6%	-6%	-7%	3%
Overseas Arrivals (NTTO)	-60%	-52%	-43%	-43%	-41%	-35%	-35%	-34%	-30%	-33%	-29%	-33%
Hotel Demand (STR)	-5%	-3%	0%	-2%	-2%	-3%	-4%	2%	-1%	-2%	1%	1%
Top 25 Group Hotel Demand* (STR)	-43%	-22%	-17%	-15%	-6%	-13%	-10%	-3%	-2%	-5%	-5%	-15%
Short-term Rental Demand (AIRDNA)	27%	18%	28%	29%	26%	22%	19%	29%	40%	31%	33%	39%
National Park Visits (National Park Service)	5%	3%	-8%	-9%	-11%	-10%	-12%	-5%	2%	-2%	-1%	29%
Organic Web Sessions (Simpleview & Tempest)*	43%	35%	33%	30%	26%	16%	15%	17%	25%	24%	19%	36%

-60% 43%

Hawaii Travel Indicators

January, 2023

Select a State

Hawaii

Hawaii Travel Impact

January, 2023

Travel Spending **\$2.21B**
↗ +0.2% vs. 2019

Tax Revenue (local & state) **\$134.2M**
↗ +0.2% vs. 2019

U. S. Total Travel Impact

January, 2023

Travel Spending **\$92.42B**
↗ +3.6% vs. 2019

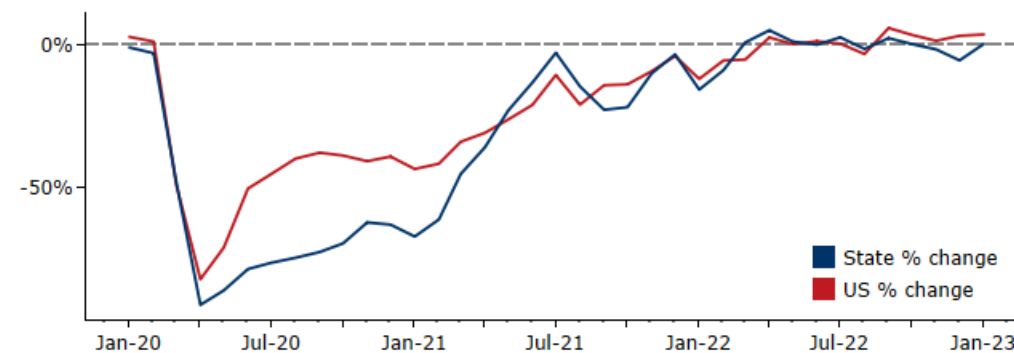
Tax Revenue (local & state) **\$6.3B**
↗ +3.2% vs. 2019

Hawaii Travel Spending

	Travel Spending	vs. Last Year	vs. 2019	Market Growth Index (US = 100)*
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
Jan-23	\$2.21B	↗ +19.1%	↗ +0.2%	97

Travel Spending (% change vs 2019)

Hawaii vs U.S. total

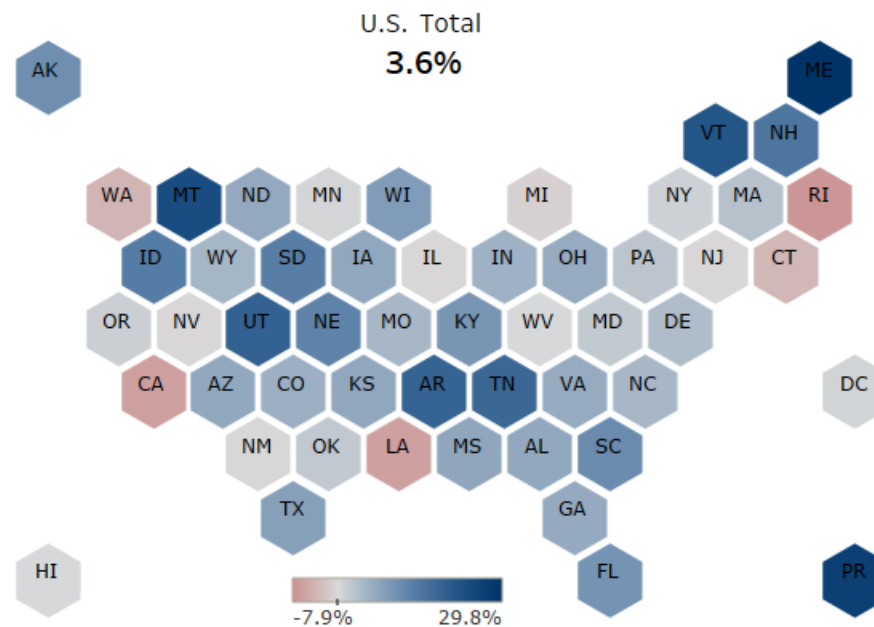


↗ +0.2%

January vs. 2019
Travel Spending
(Tourism Economics)

Travel Spending by State

January, 2023, % change vs. 2019



Travel Spending



↗ +4.5%

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



↘ -8.9%

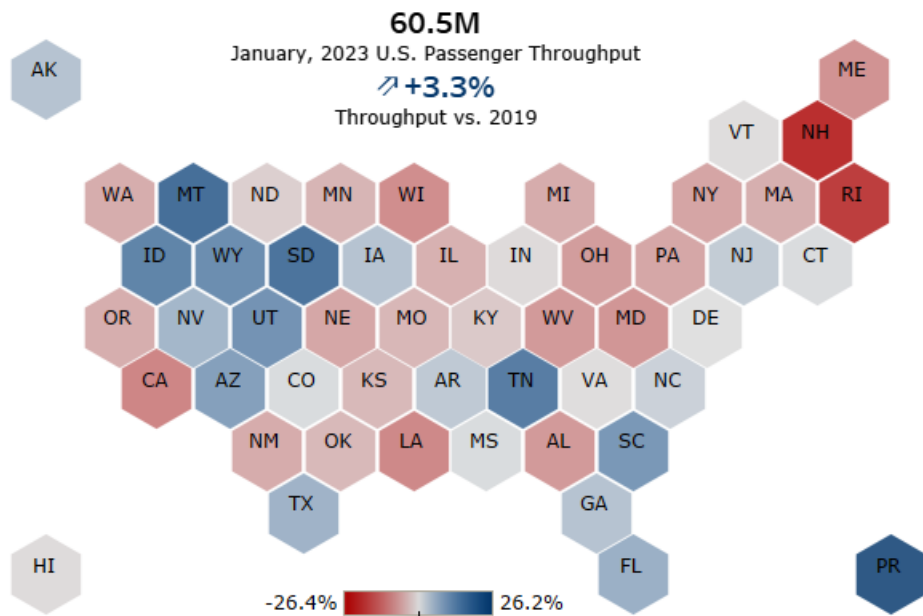
January vs. 2019
Hotel Demand
(STR)

Economics (Travel Spending)

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

January, 2023 Passenger Throughput by State

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



Passenger Throughput Trend Comparison

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

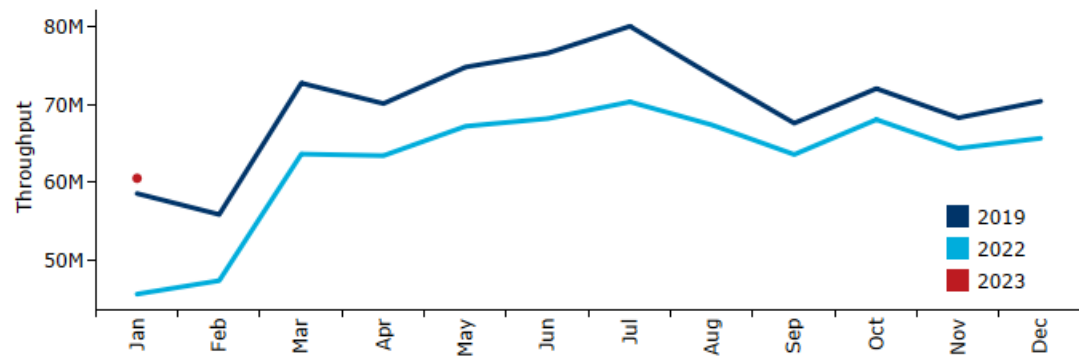
State/Territory Name
Multiple values

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Arizona	85	96	96	104	103	99	99	100	108	106	107	98	110
California	61	71	76	82	83	82	83	81	89	88	89	83	88
Colorado	83	92	94	94	91	89	88	89	96	97	98	93	101
Hawaii	72	77	87	94	90	86	91	91	96	96	94	95	99
Illinois	71	76	82	84	87	87	88	87	91	90	92	87	94
Indiana	83	85	89	91	88	85	86	87	91	91	93	86	99
Kentucky	74	82	86	88	85	86	88	86	92	89	92	88	97
Massachusetts	61	71	81	86	86	86	88	87	92	94	93	86	94
Michigan	71	82	85	86	85	83	83	84	88	86	90	83	93
Minnesota	72	80	82	83	80	80	80	80	83	86	92	84	95
Missouri	72	78	85	86	87	86	87	89	94	91	94	84	95
Montana	106	113	112	109	109	104	100	105	115	115	114	101	120
Nevada	79	91	94	98	100	97	101	99	102	108	103	101	106
New York	64	75	79	86	86	84	86	86	89	88	92	86	93
North Carolina	72	84	90	91	91	91	91	89	97	93	96	91	102
Oregon	72	80	84	90	88	85	82	82	90	90	92	81	94
South Dakota	94	104	107	108	99	98	101	99	102	105	104	90	119
Texas	82	88	95	99	100	96	97	97	106	104	105	100	107
Virginia	67	75	84	90	91	90	93	89	95	93	95	91	100
Washington	70	82	82	89	87	85	85	85	92	93	92	83	93
United States	78	85	88	91	90	89	88	91	94	95	94	93	103



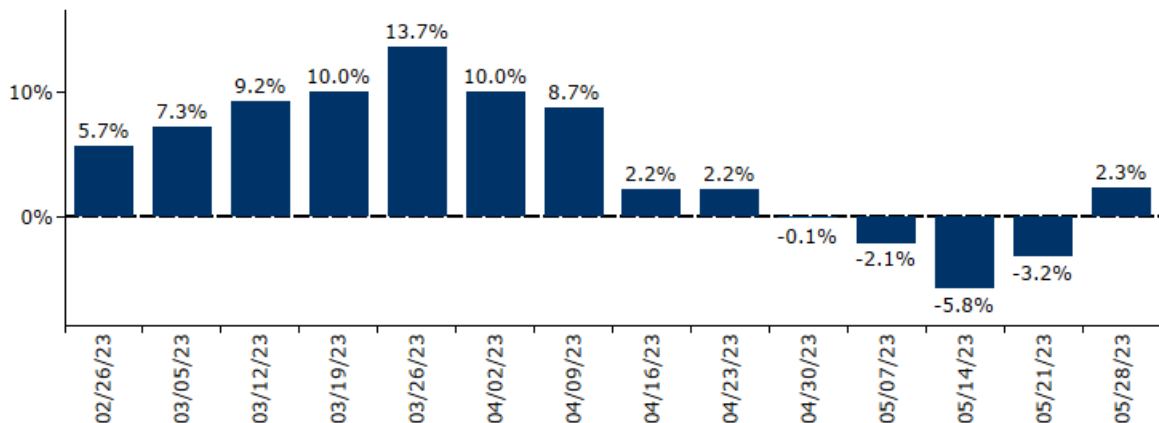
U.S. Monthly Passenger Throughput

All passengers (domestic + international)



U.S. Hotel Leisure Transient Occupancy Pace

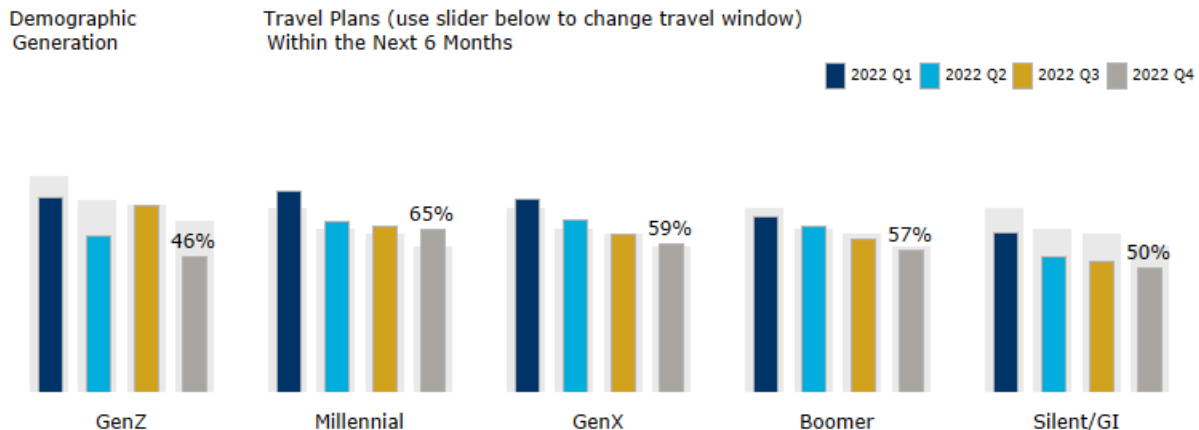
2022 leisure hotel booking pace vs same time 2020 (pre-pandemic), 7-day running average by stay date



Source: TravelClick, an Amadeus Company

Planning Leisure Travel Within the Next 6 Months

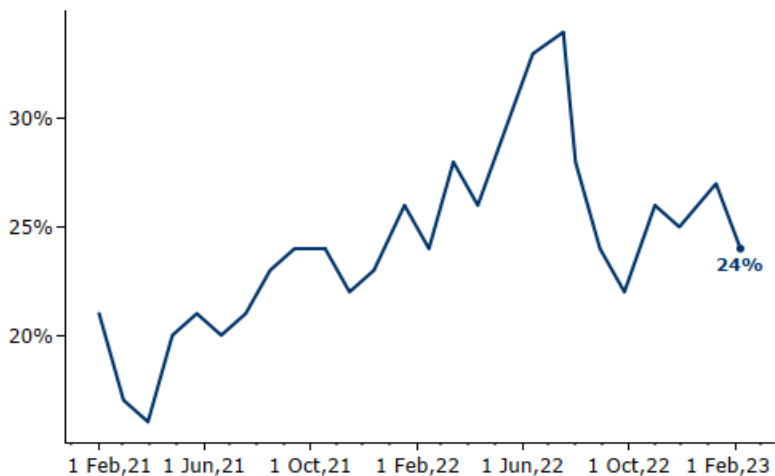
% of American Consumers



Source: MMGY Global's Portrait of American Travelers (released Q4 2022)

Consumer Travel Sentiment

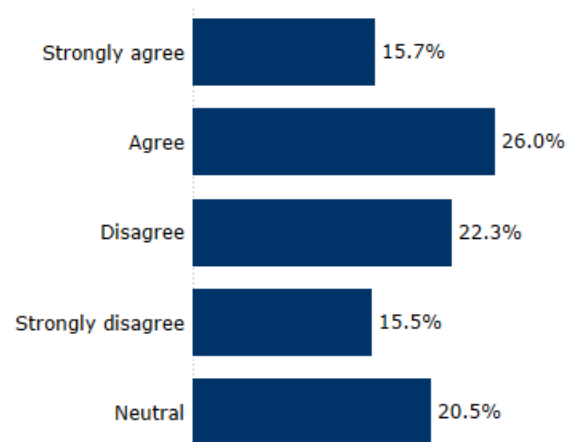
Transportation Cost Will Greatly Impact my Decision to Travel the Next ...



Source: Longwoods International

Consumer Travel Priorities

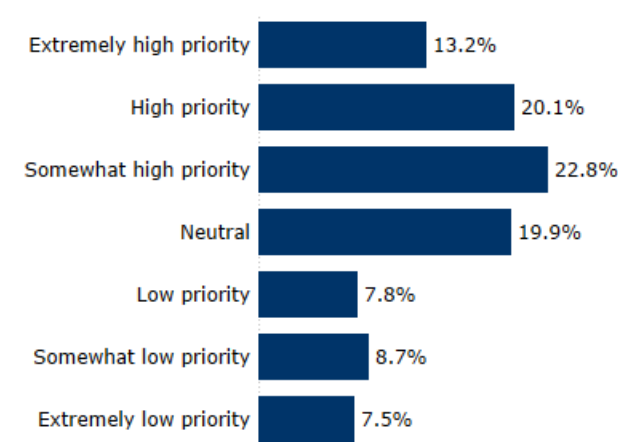
Have high travel prices kept you from traveling in the past month?



Source: Destination Analysts (As of January 2023)

Consumer Travel Priorities

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



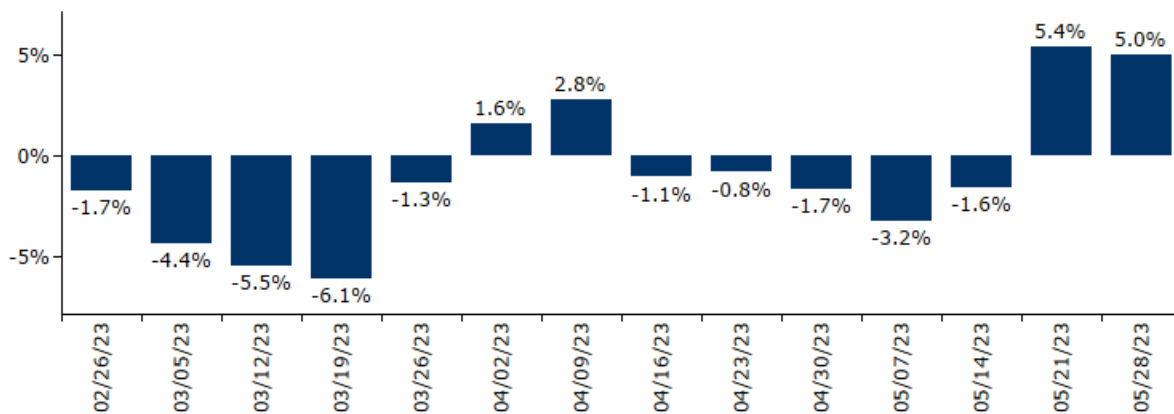
Source: Destination Analysts (As of January 2023)

Domestic Business Travel

January, 2023

U.S. Hotel Corporate Transient Occupancy Pace

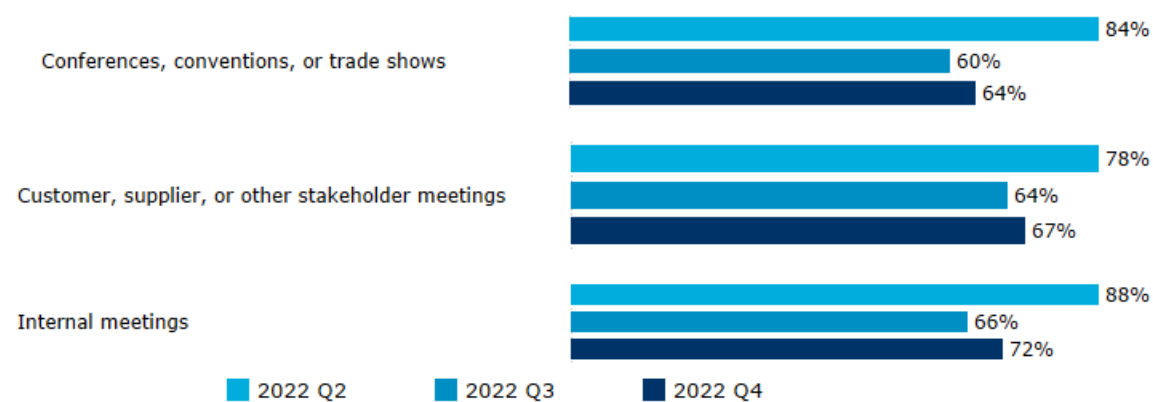
Corporate booking pace vs same time in 2020 (pre-pandemic), 7-day running avg by stay date



Source: TravelClick, an Amadeus Company

Business Travel Spending by Purpose of Trip

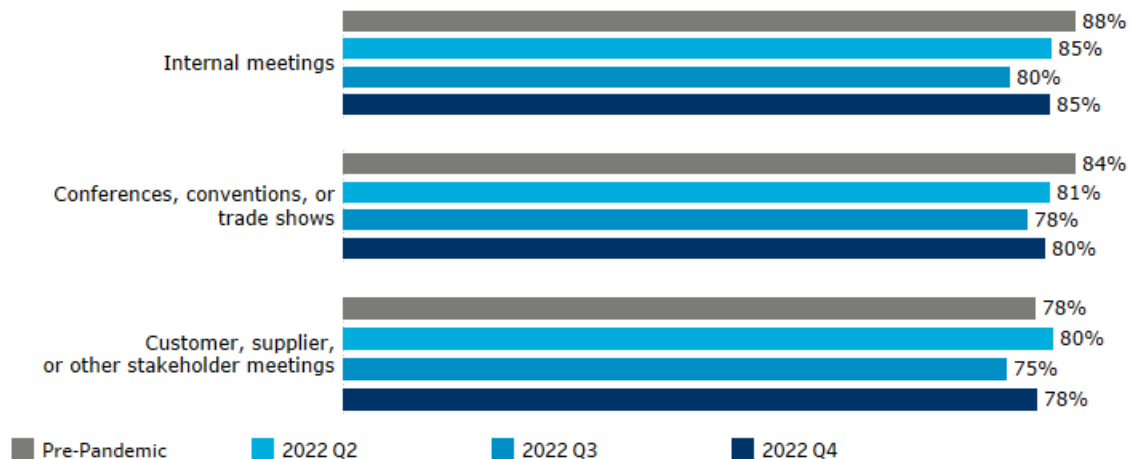
Corporate executives expecting to spend less over the next 6-months, released January 2023



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



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



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

Insights

DMO/CVB group room nights contracted registered 4% below its 2019 level in January, an improvement from the 19% decline posted in December

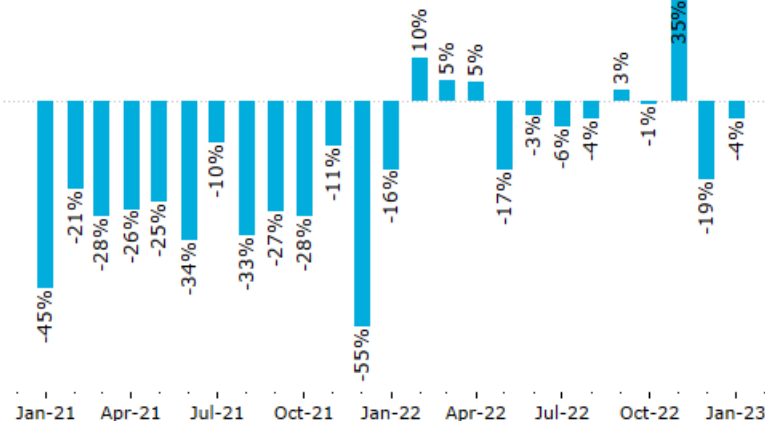
DMO/CVB pace for room nights on the books gained ground on its 2019 benchmark for the second half of 2023, with 2023 Q3 and 2023 Q4 improving by two and one percentage points, respectively, in comparison to the prior month.

Optimism among meeting planners remained buoyant in the February survey, with the share responding that they are less optimistic about the outlook for recovery declining to 12% from 13% in October.

However, the share of meeting planners that expect to plan more in-person meetings/events in 2023 compared to 2022 eased to 66% from 67% in December.

DMO/CVB Group Bookings

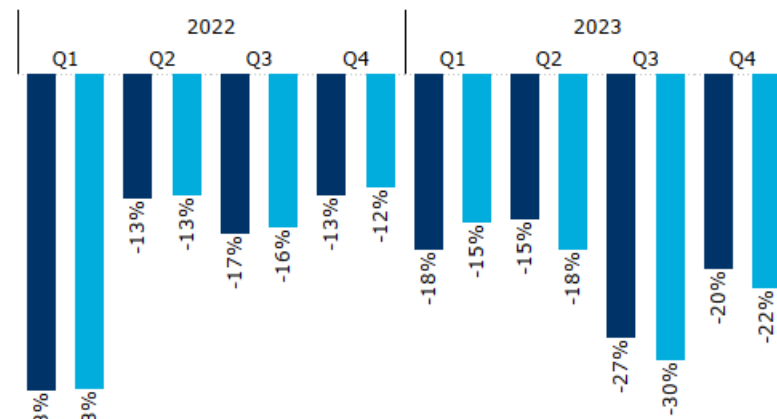
Hotel room nights contracted during most recent months
% change from 2019



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

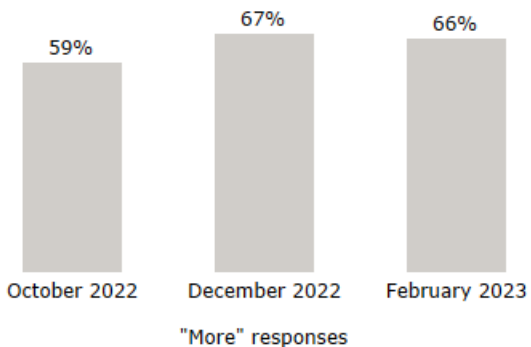


Source: Simpleview CRM (250+ U.S. DMOs)

As of Date
 ■ January, 2023
 ■ February, 2023

Event Planner

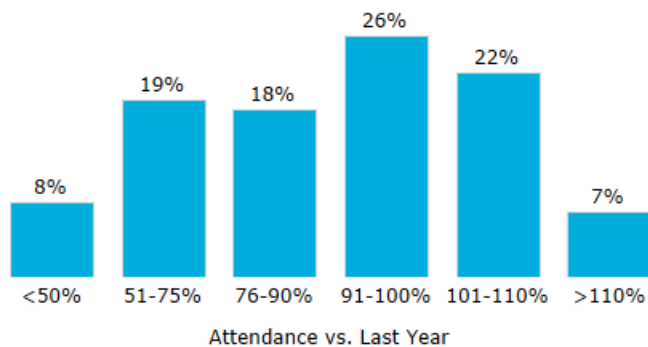
% Of meeting planners who expect to plan more in-person meetings in 2023 than in 2022



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of February 2023

Event Attendees

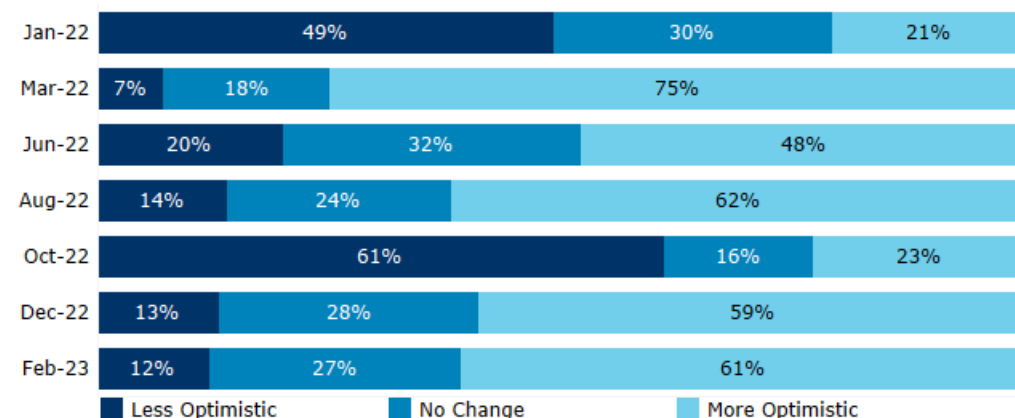
How many in-person attendees do you expect in 2023 for your average meetings vs your 2022 results?



As of February 2023

Meeting Planner Outlook

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



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey)



Vision Insights Destination Brand Health Trends



Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the U.S., Japan, Canada, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for daily brand health tracking metrics – media-focused, brand health, purchase/intent, and consumer status

Brand Health Metrics

- **Destination Awareness:** Percentage of people that are aware of a destination
- **Chatter (Net):** Net percentage of people who heard something positive about a destination and people who heard something negative about a destination in the last 2 weeks
- **Consideration:** Percentage of people who are “Likely” to “Very Likely to Consider” a destination for their next vacation (Top 3 box of 8-point scale)
- **Favorability:** Percentage of people who rated a destination as “Favorable” or “Very Favorable” (Top 2 box of a 5-point scale)

Destinations

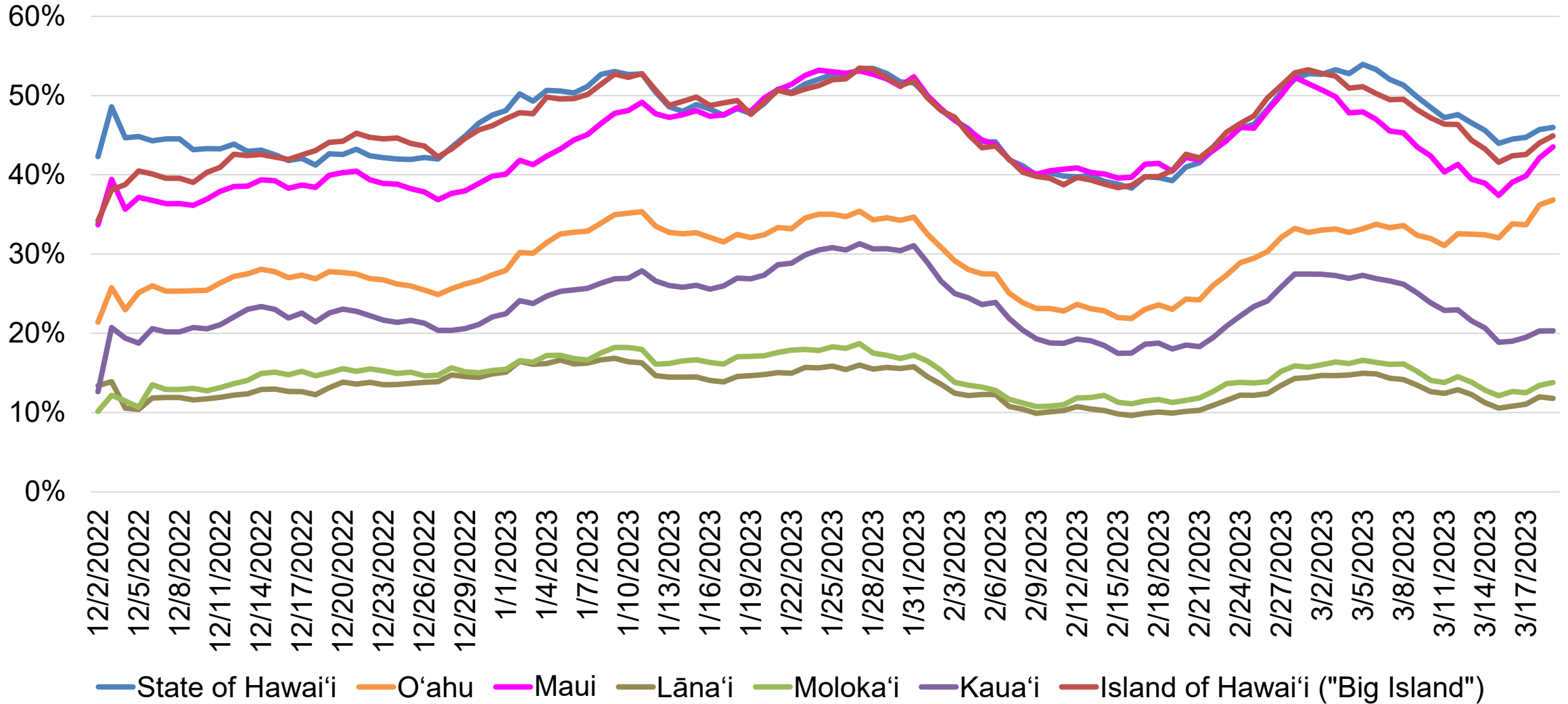
- Respondents are asked about:
 - State of Hawai‘i
 - O‘ahu
 - Maui
 - Lāna‘i
 - Moloka‘i
 - Kaua‘i
 - Hawai‘i Island
- Selecting State of Hawai‘i indicates respondents’ awareness/chatter/consideration/favorability for the overall Hawai‘i brand (the concept of a beautiful place called “Hawai‘i”) and lack of familiarity with individual islands



United States Destination Brand Health Trends

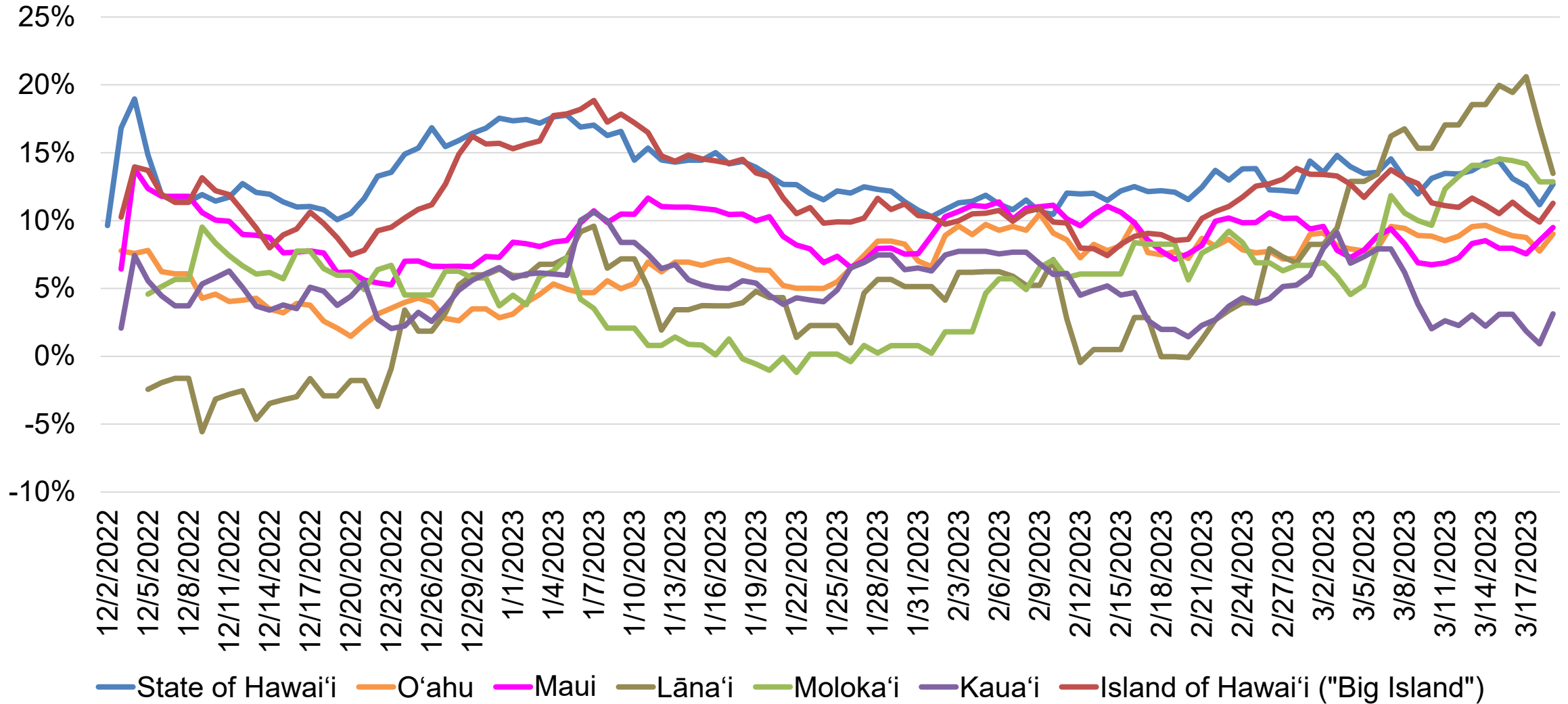


U.S. Destination Awareness Two-Week Moving Average



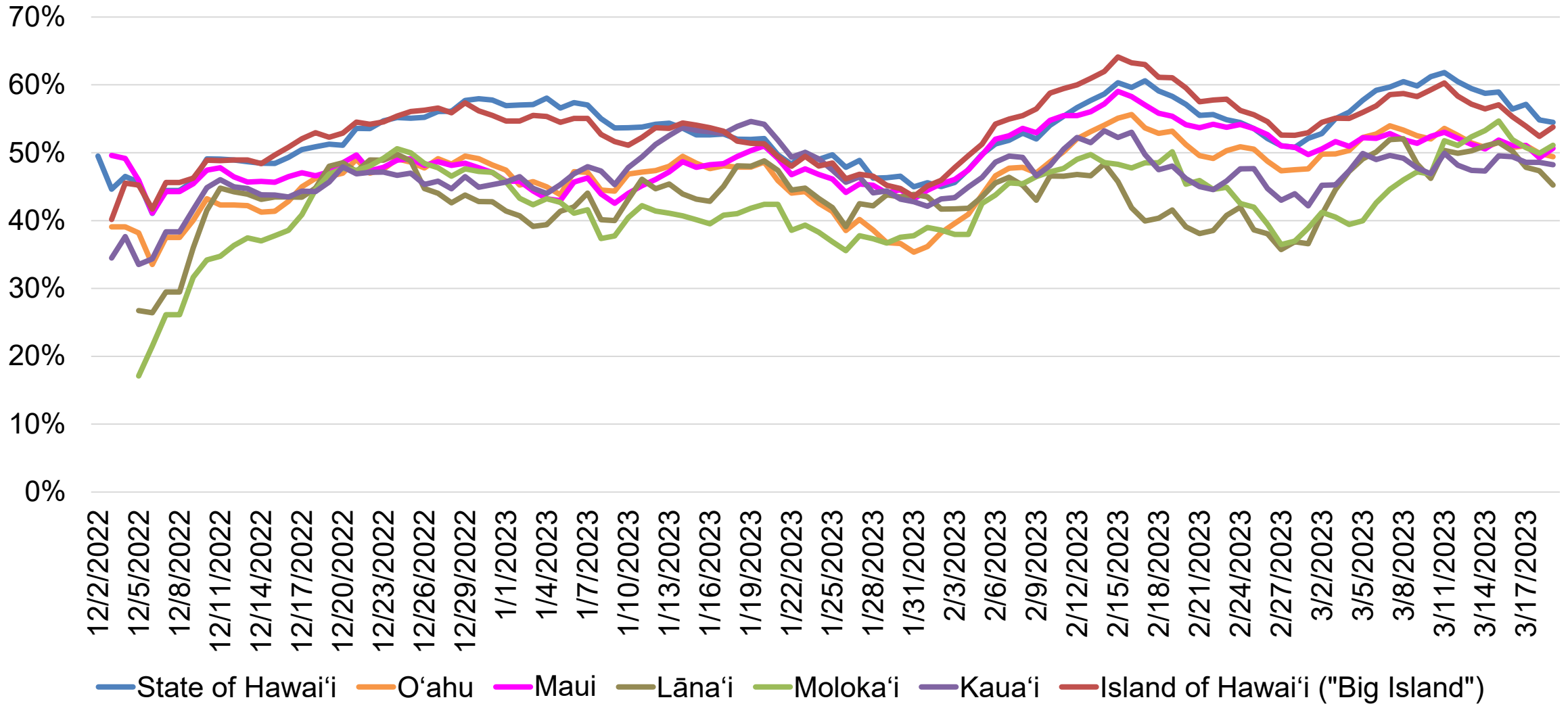
Source: Vision Insights Data as of March 30, 2023

U.S. Chatter (Net) Two-Week Moving Average



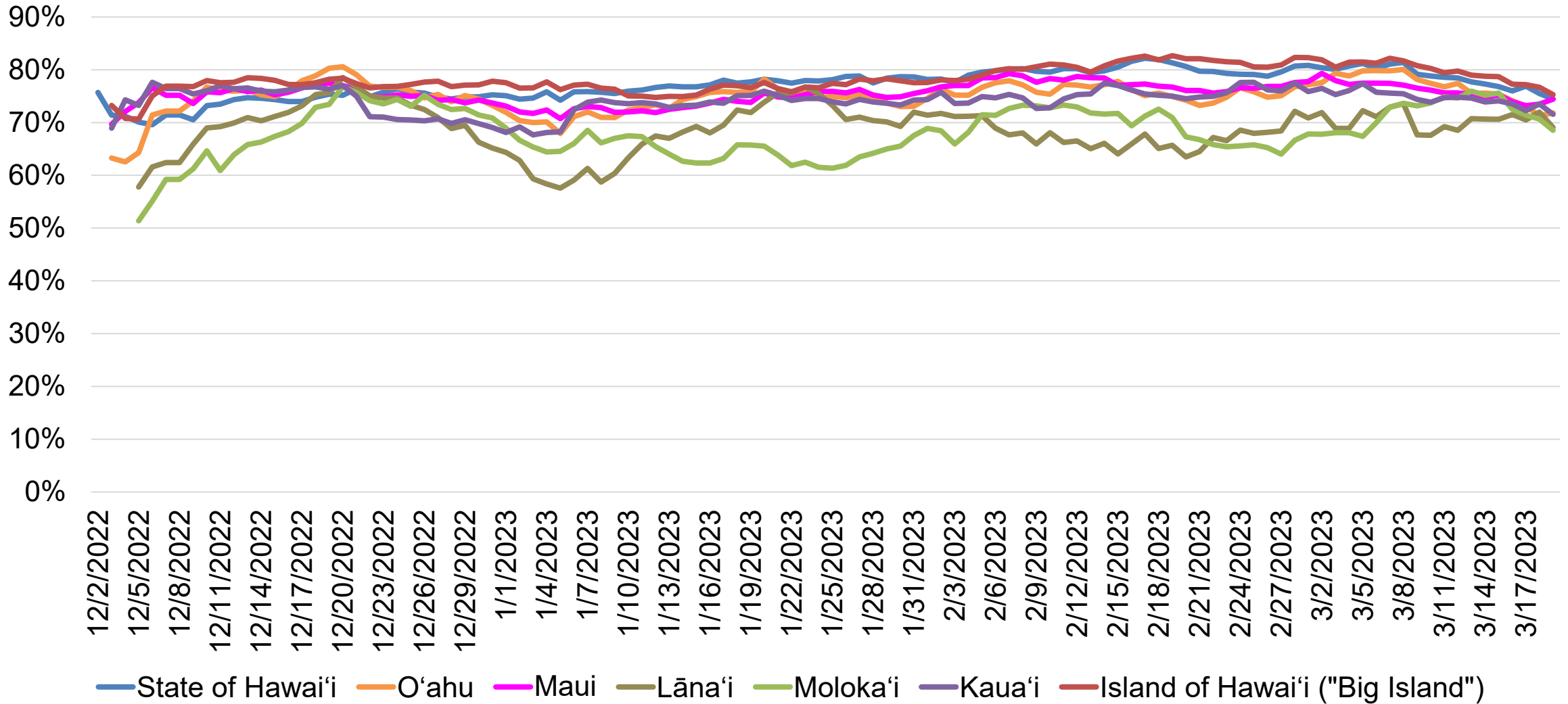
Source: Vision Insights Data as of March 30, 2023

U.S. Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

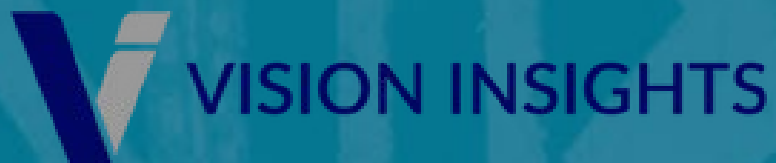
U.S. Favorability Two-Week Moving Average



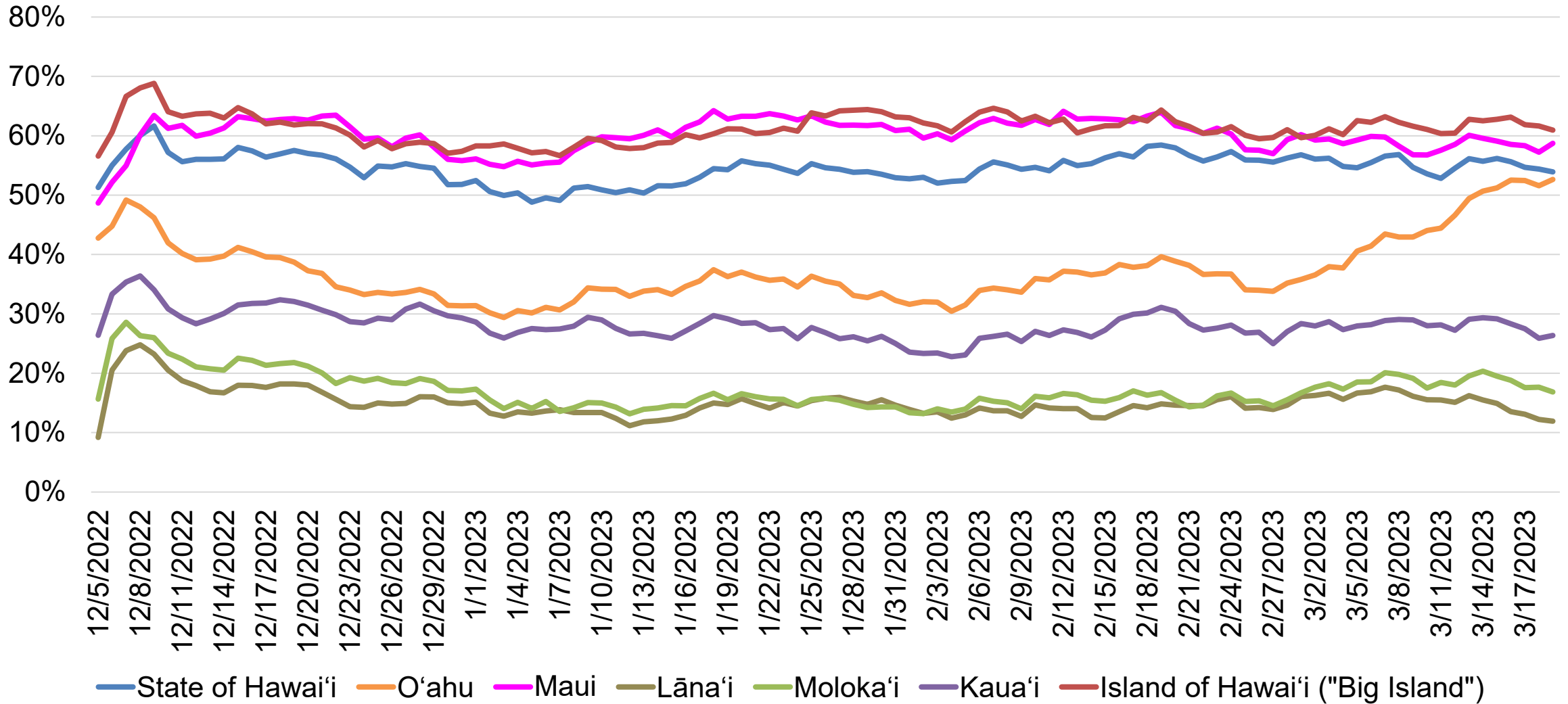
Source: Vision Insights Data as of March 30, 2023



Canada Destination Brand Health Trends

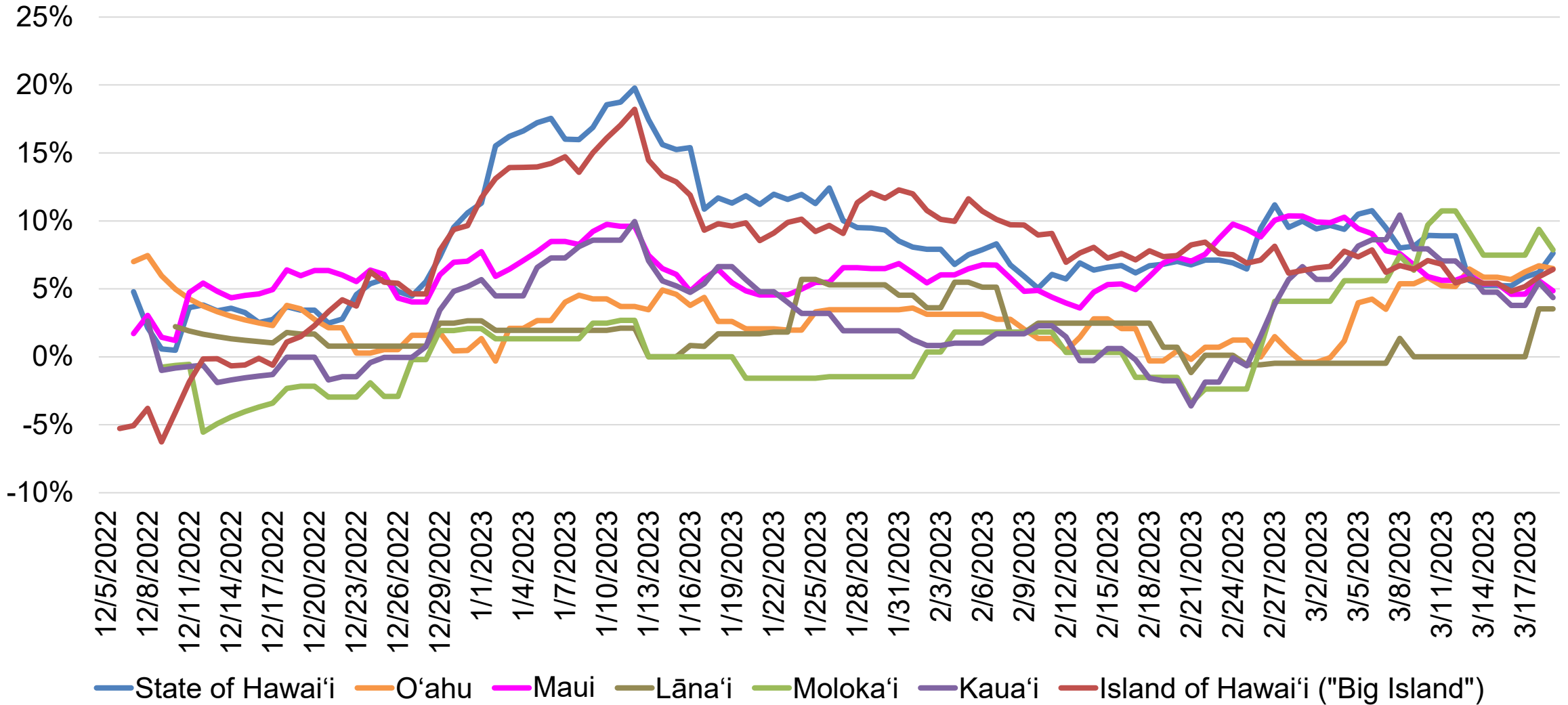


Canada Destination Awareness Two-Week Moving Average



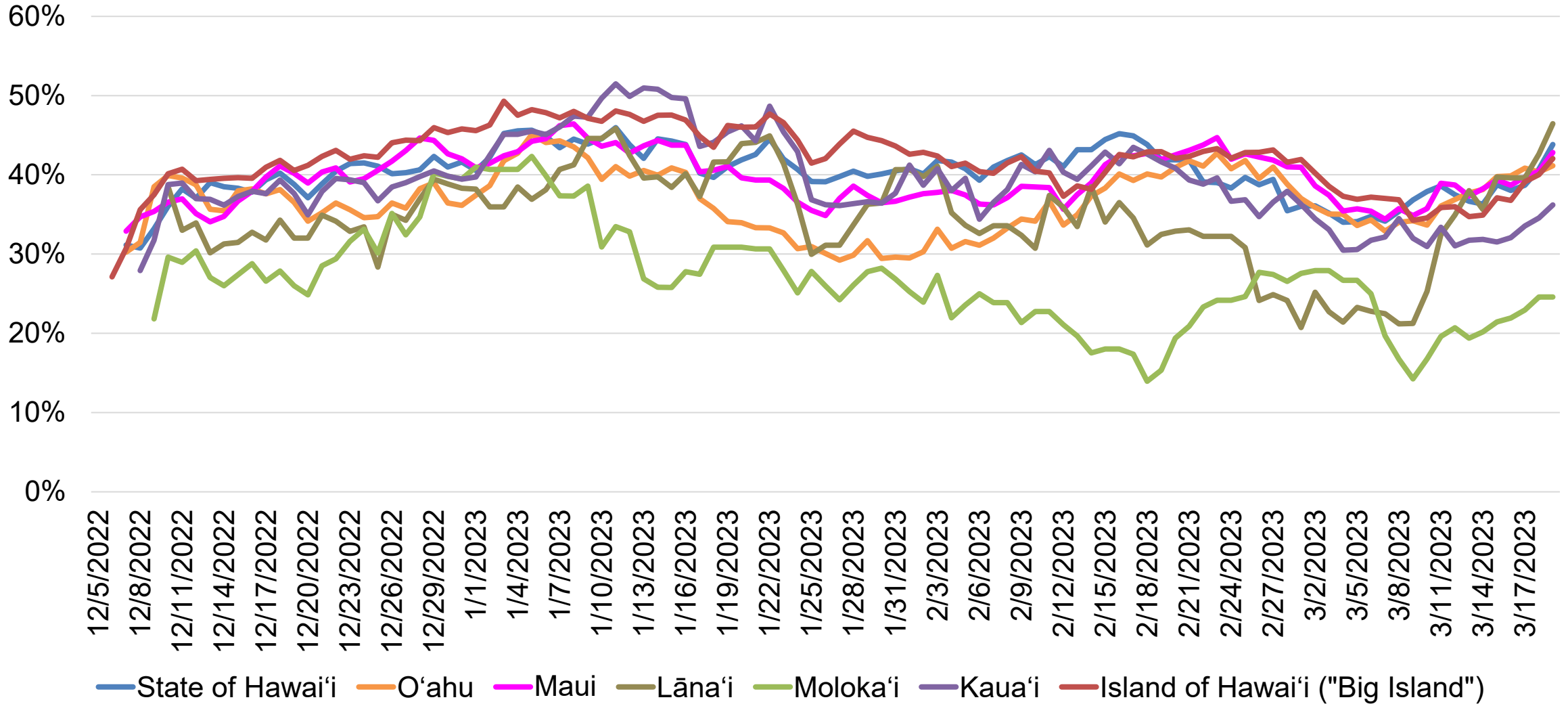
Source: Vision Insights Data as of March 30, 2023

Canada Chatter (Net) Two-Week Moving Average



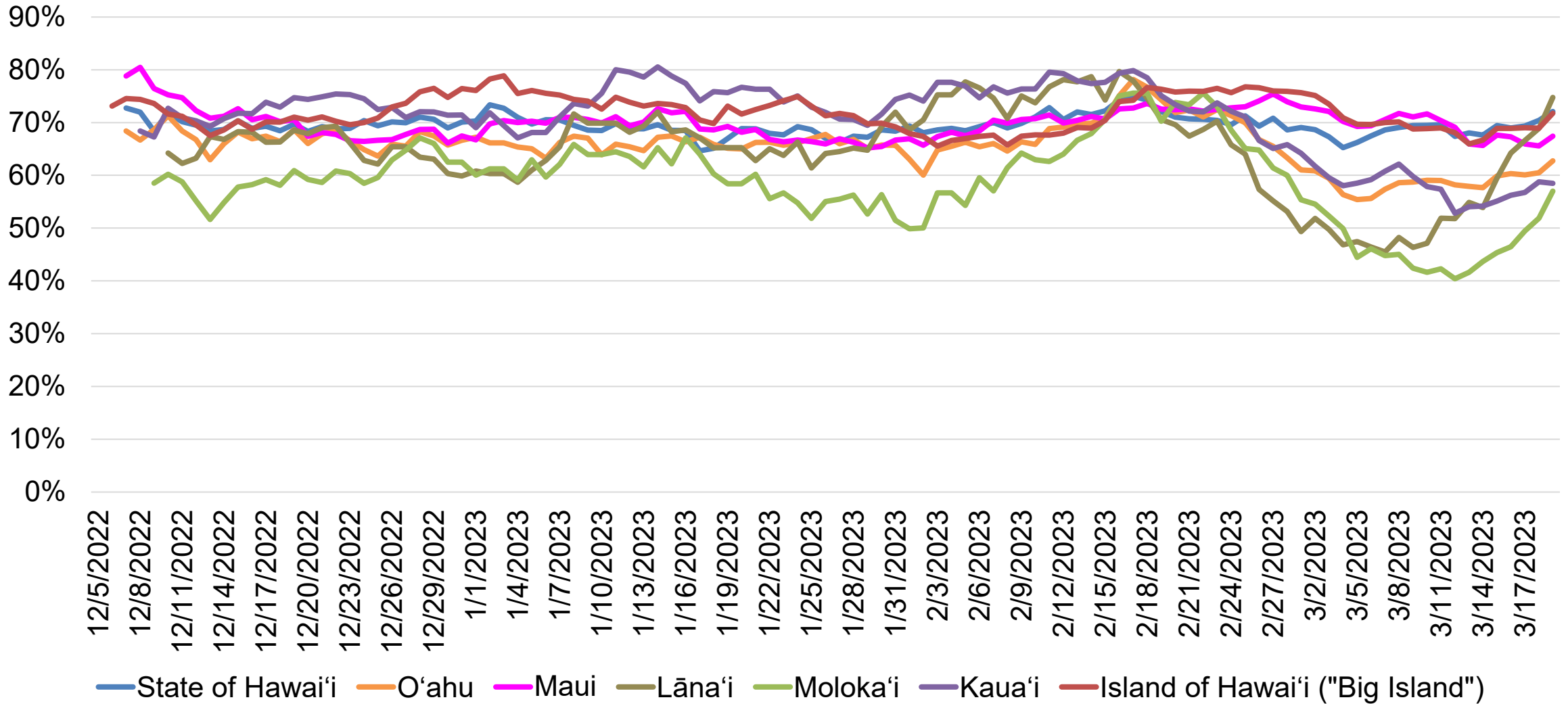
Source: Vision Insights Data as of March 30, 2023

Canada Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

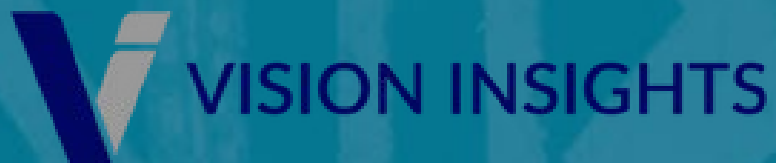
Canada Favorability Two-Week Moving Average



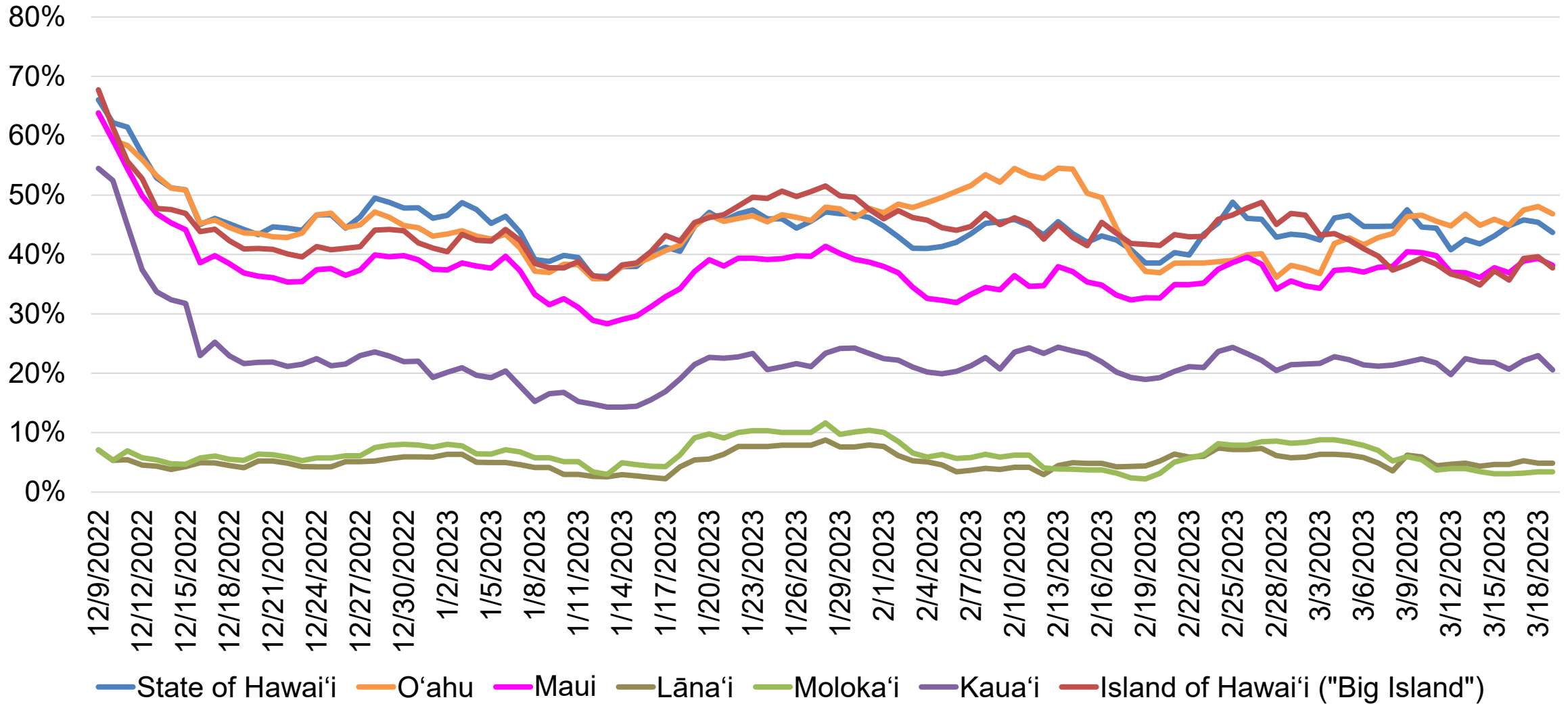
Source: Vision Insights Data as of March 30, 2023



Japan Destination Brand Health Trends

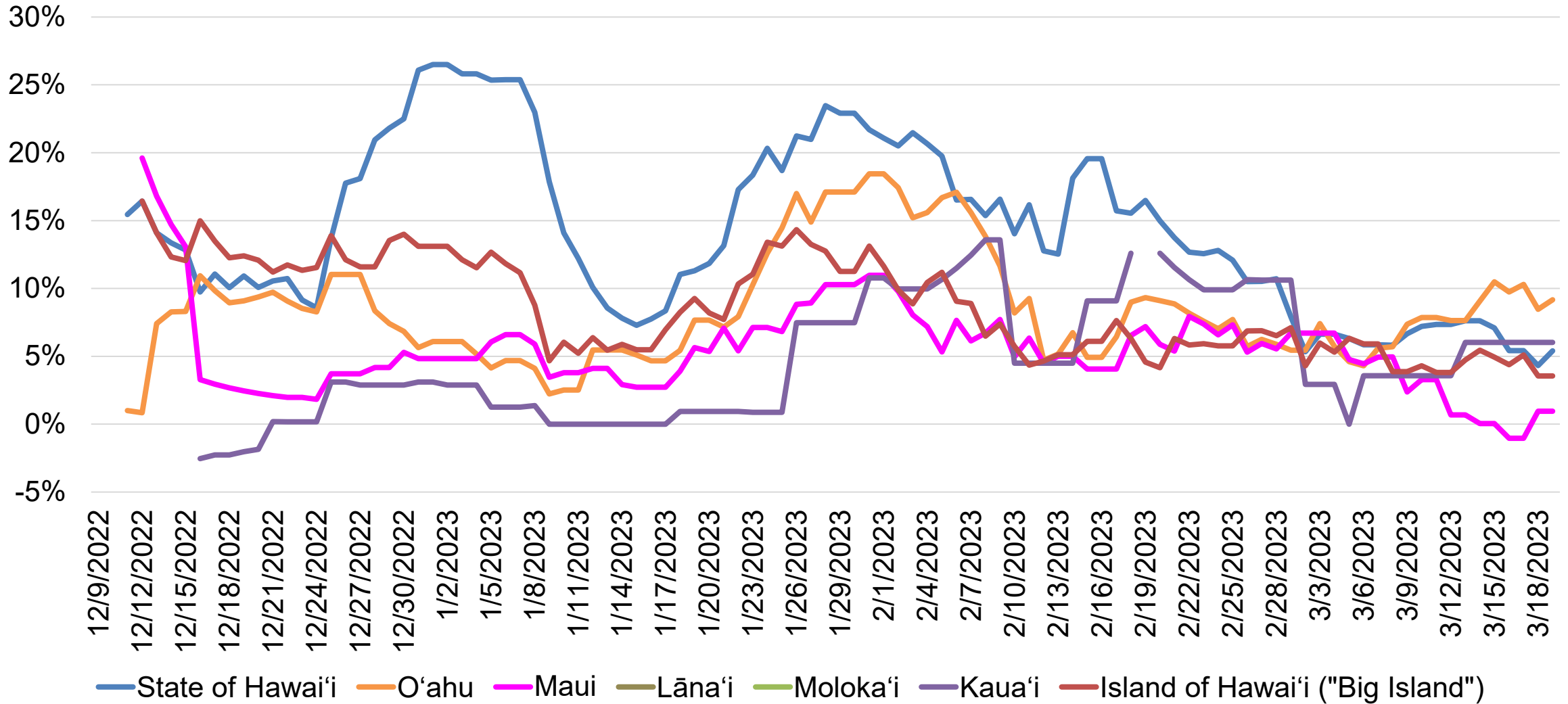


Japan Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

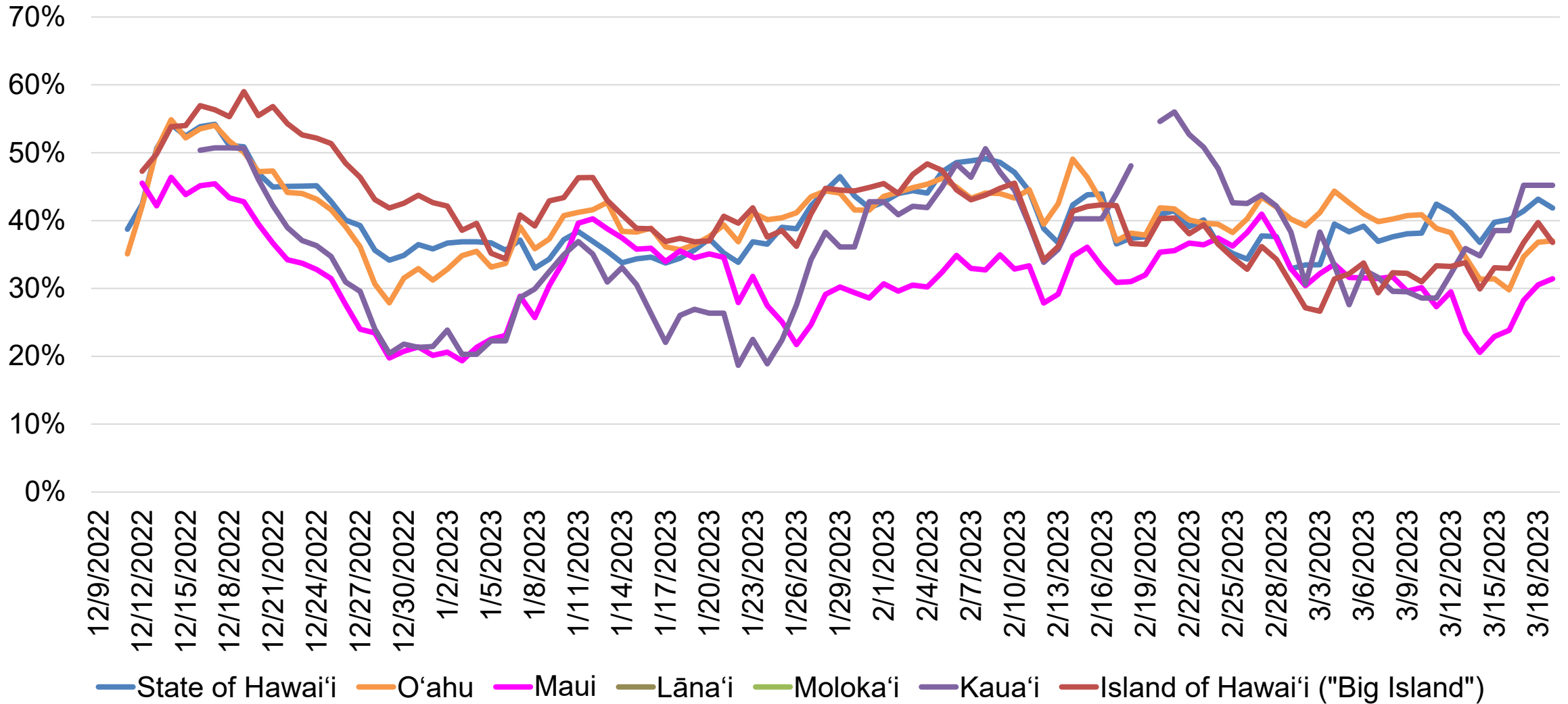
Japan Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

*Samples for Moloka'i and Lāna'i are small

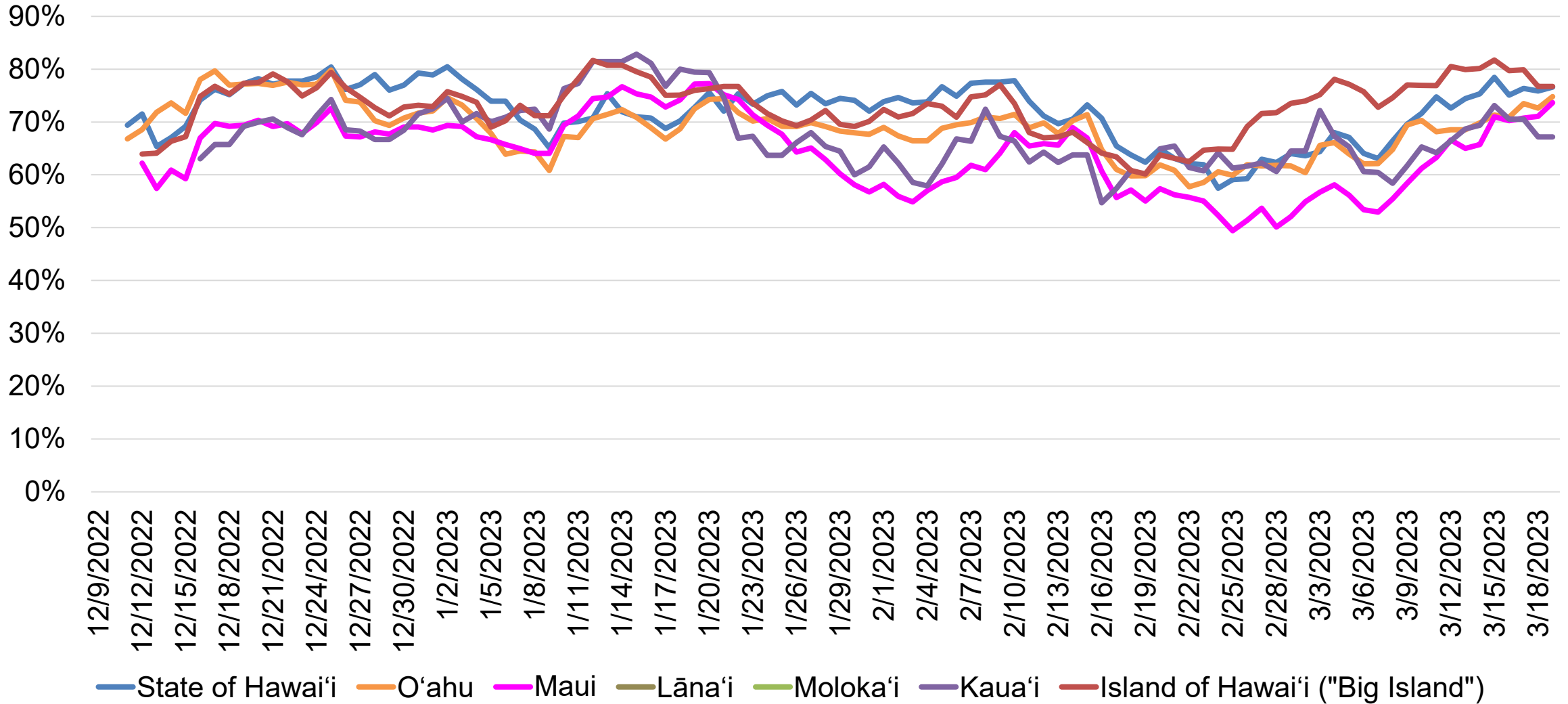
Japan Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

*Samples for Moloka'i and Lāna'i are small

Japan Favorability Two-Week Moving Average

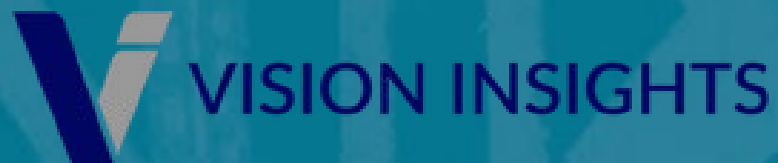


Source: Vision Insights Data as of March 30, 2023

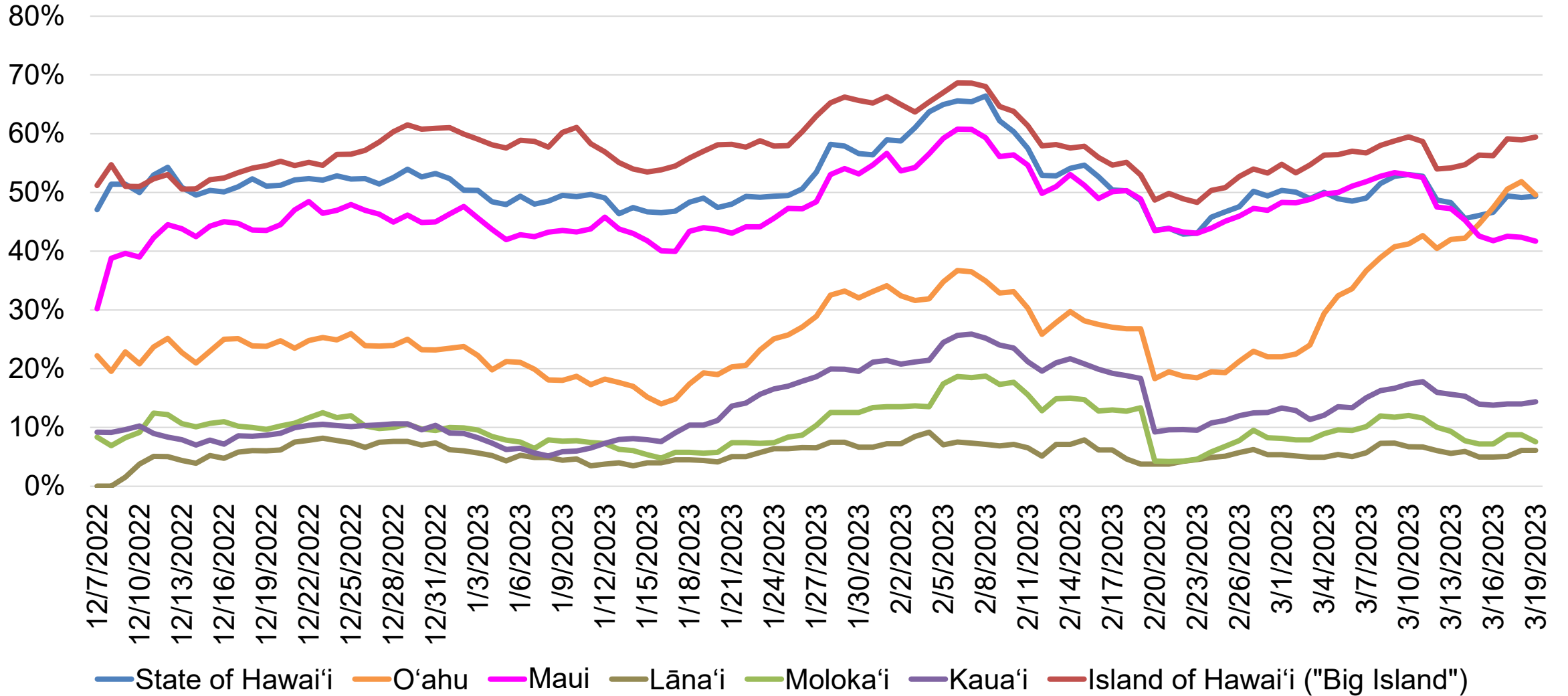
*Samples for Moloka'i and Lāna'i are small



Australia Destination Brand Health Trends

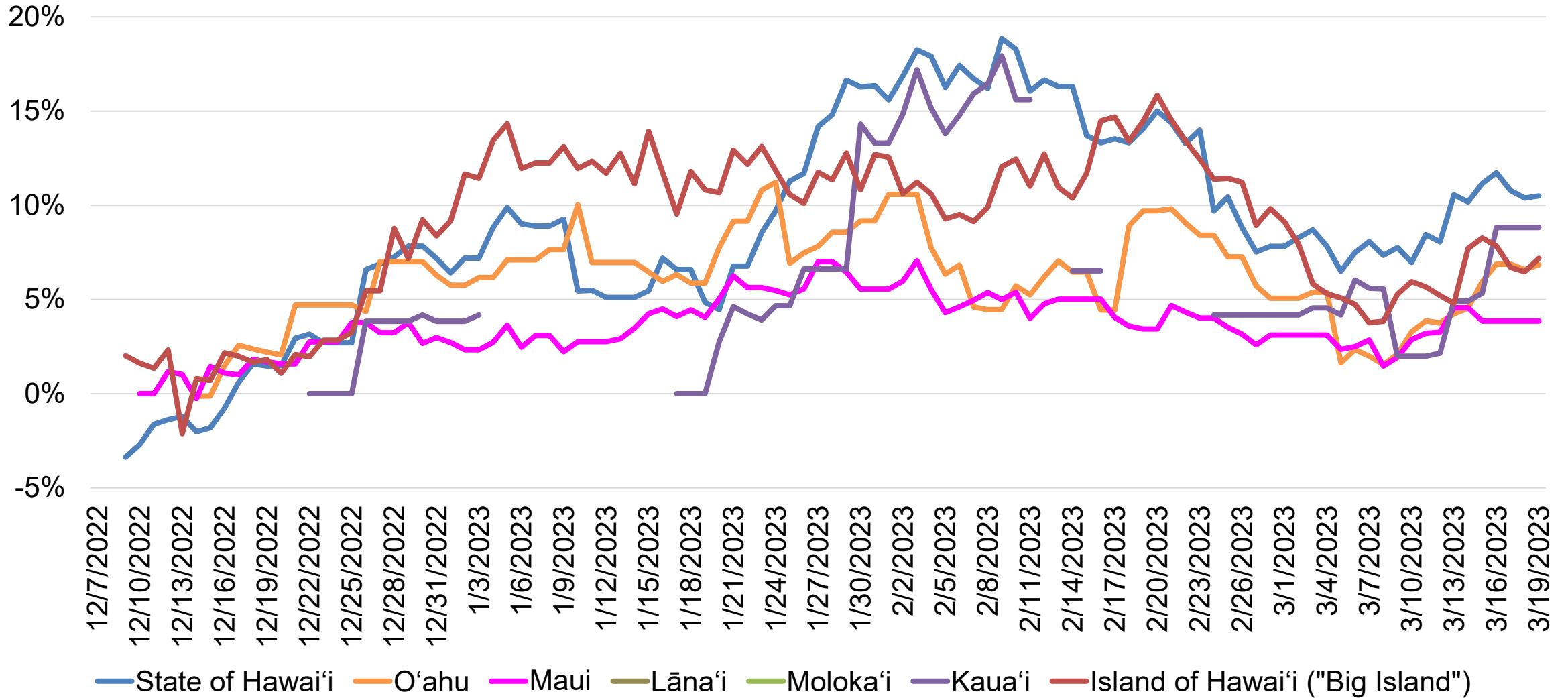


Australia Destination Awareness Two-Week Moving Average



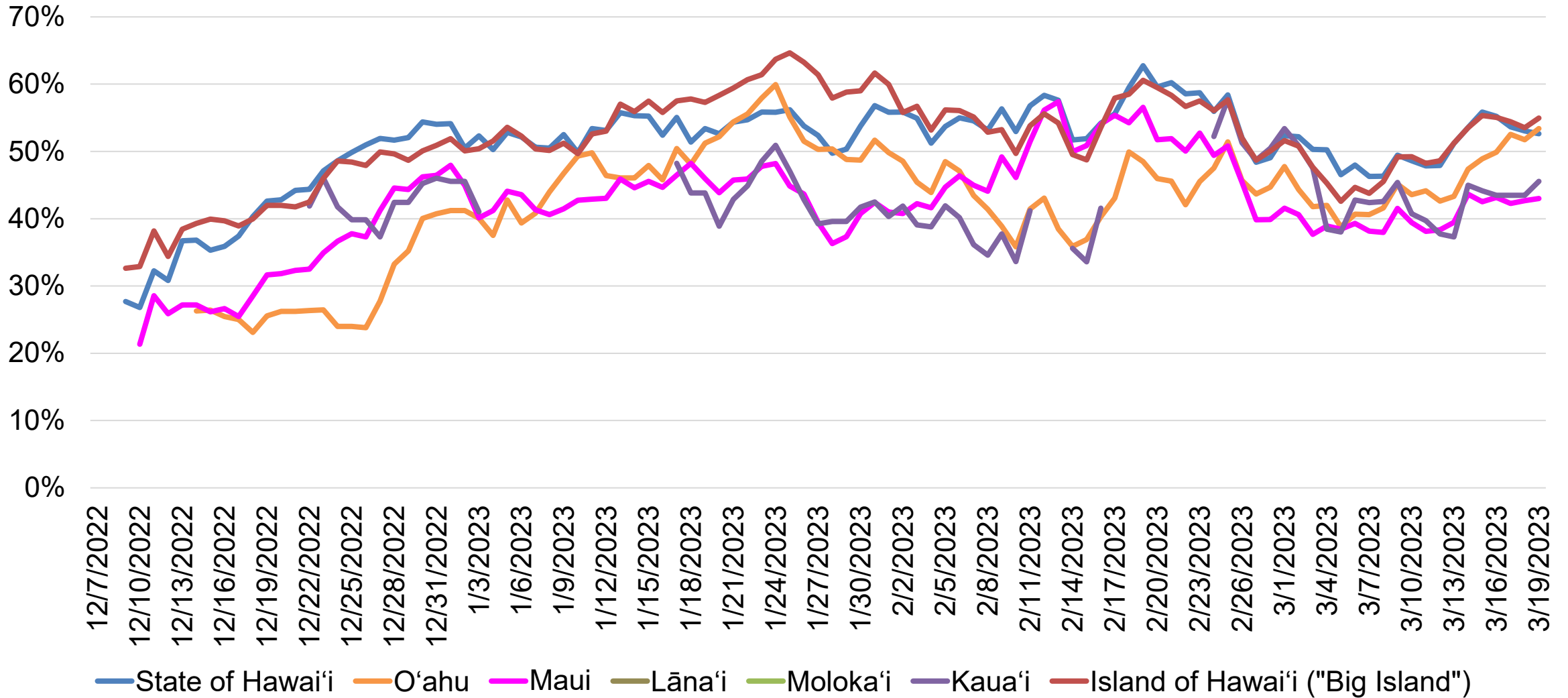
Source: Vision Insights Data as of March 30, 2023

Australia Chatter (Net) Two-Week Moving Average



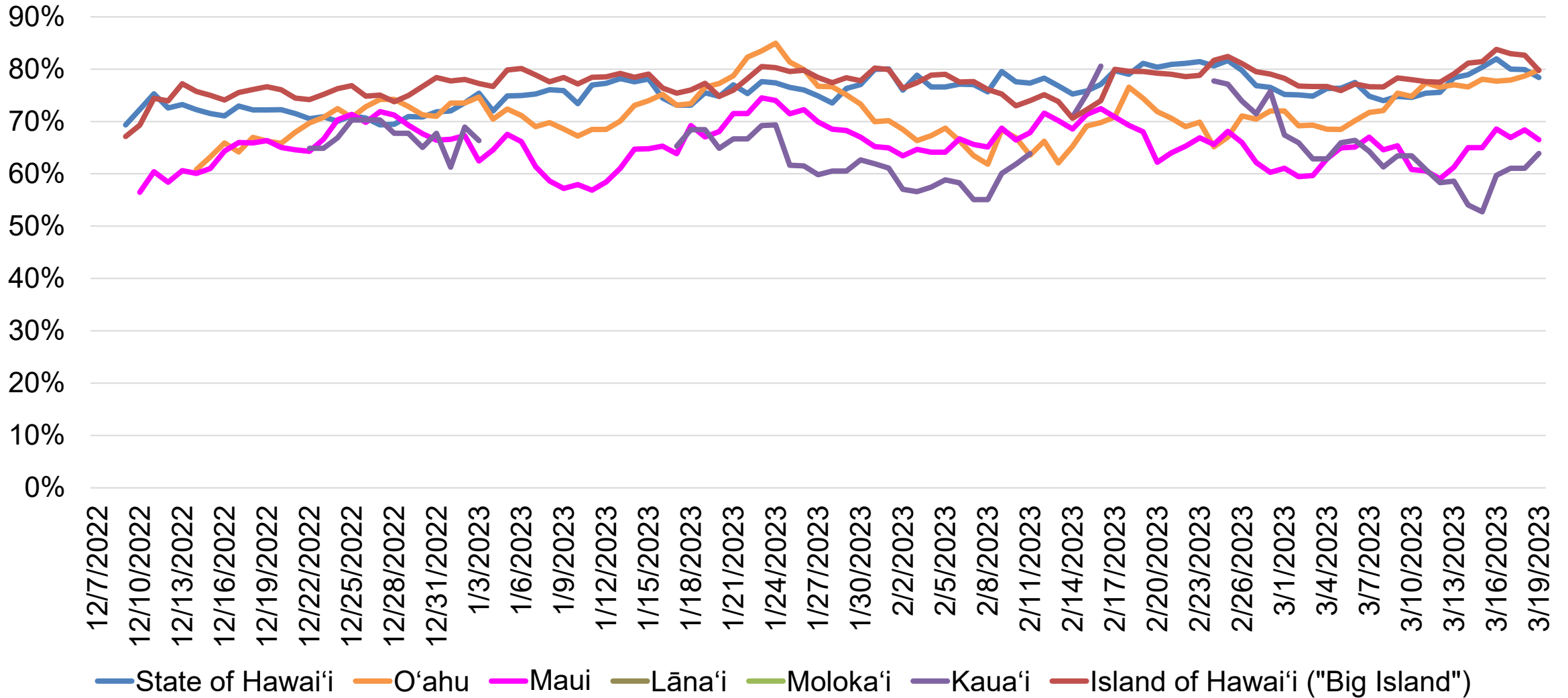
Source: Vision Insights Data as of March 30, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited

Australia Favorability Two-Week Moving Average



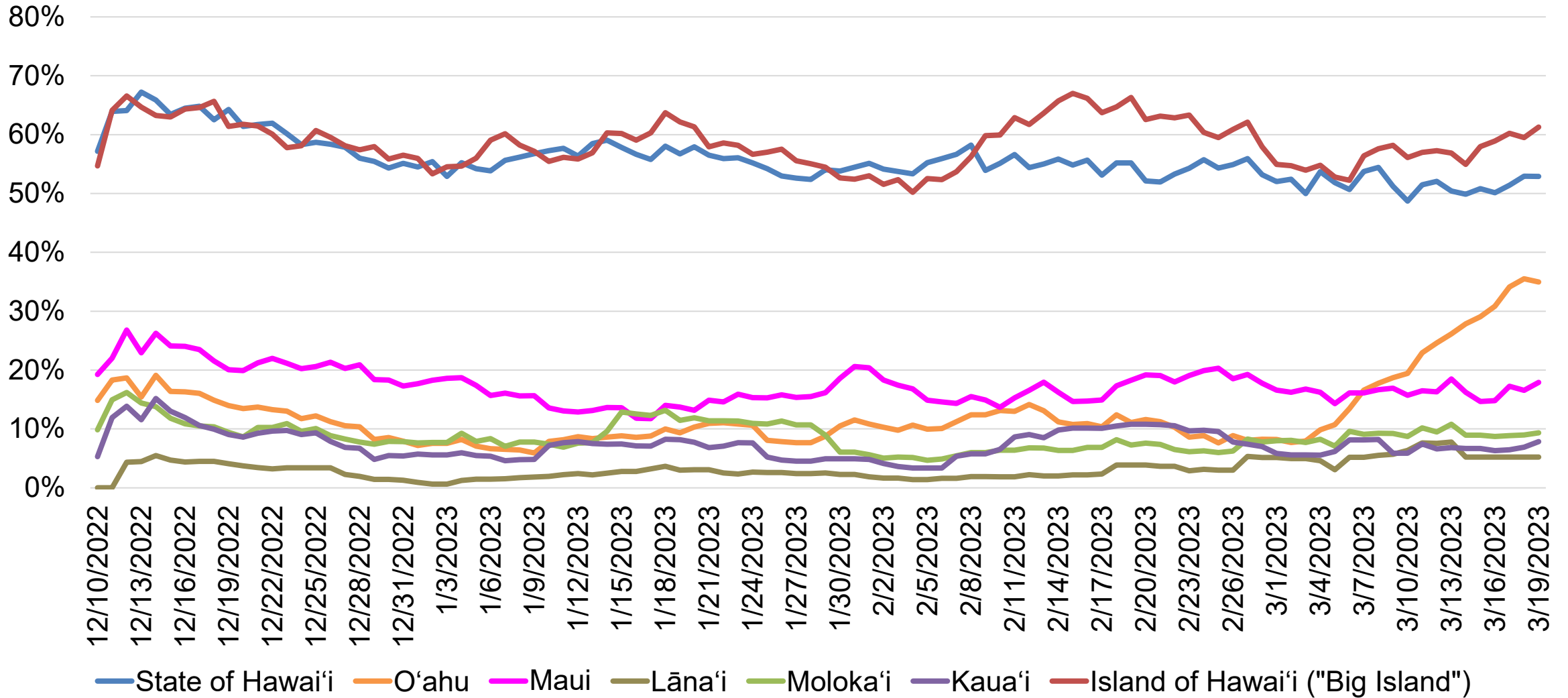
Source: Vision Insights Data as of March 30, 2023
 Samples for Kaua'i, Moloka'i, and Lāna'i are limited



Korea Destination Brand Health Trends

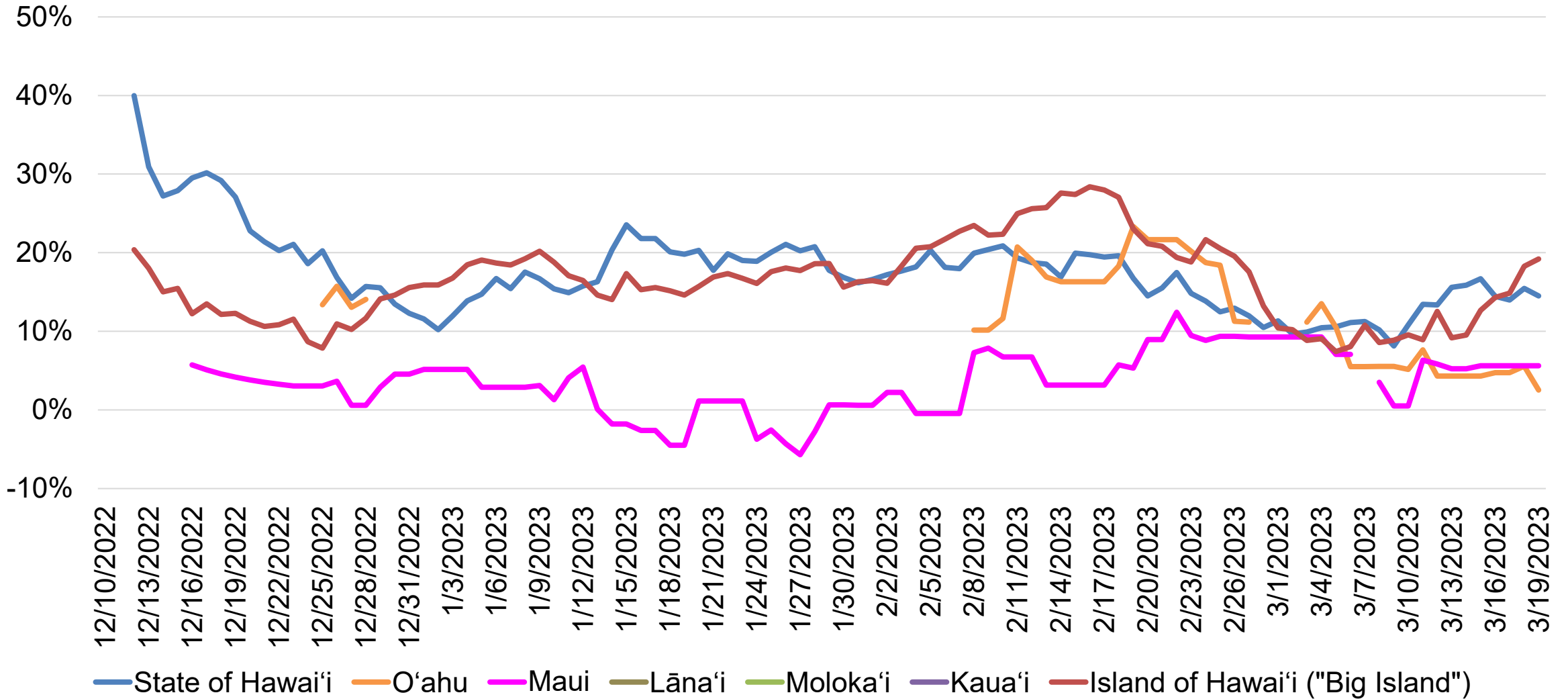


Korea Destination Awareness Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

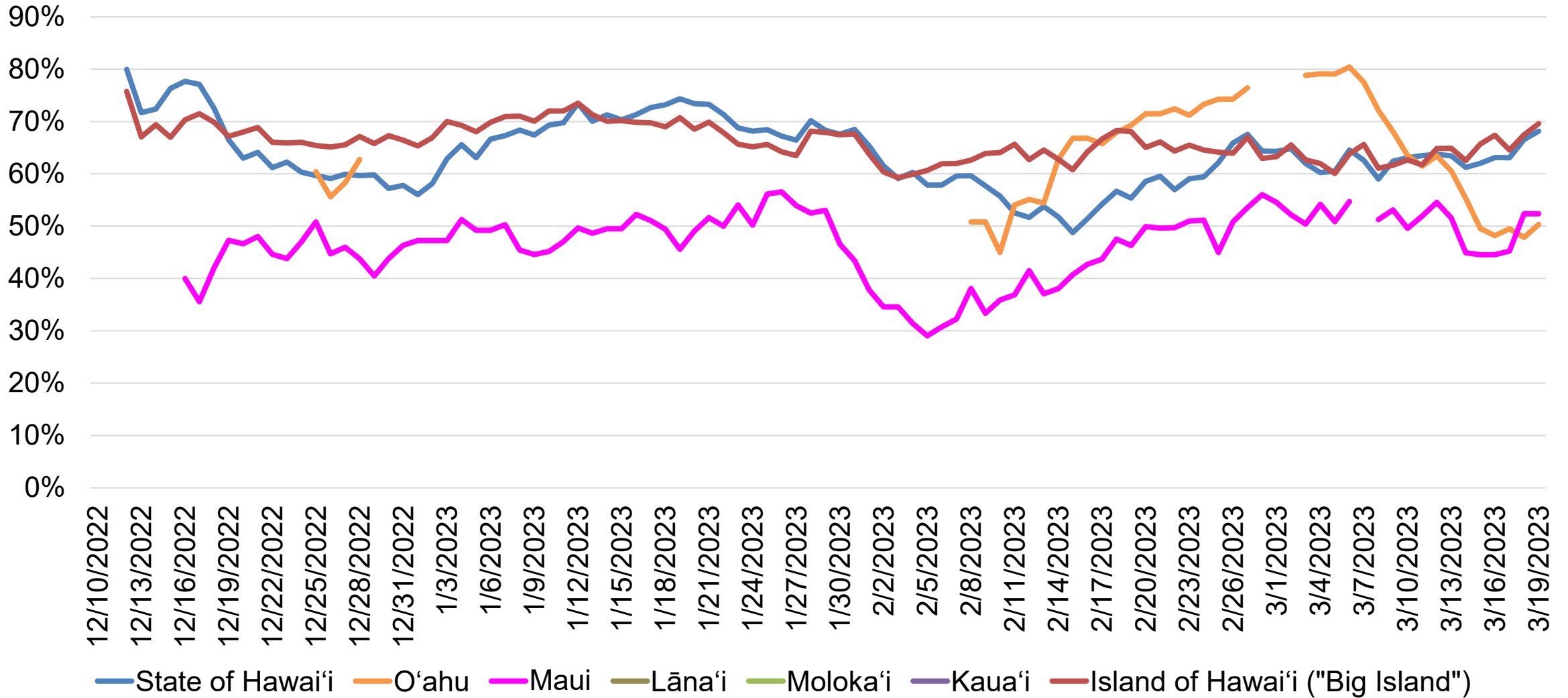
Korea Chatter (Net) Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

Samples for O'ahu, Kaua'i, Moloka'i, and Lāna'i are limited

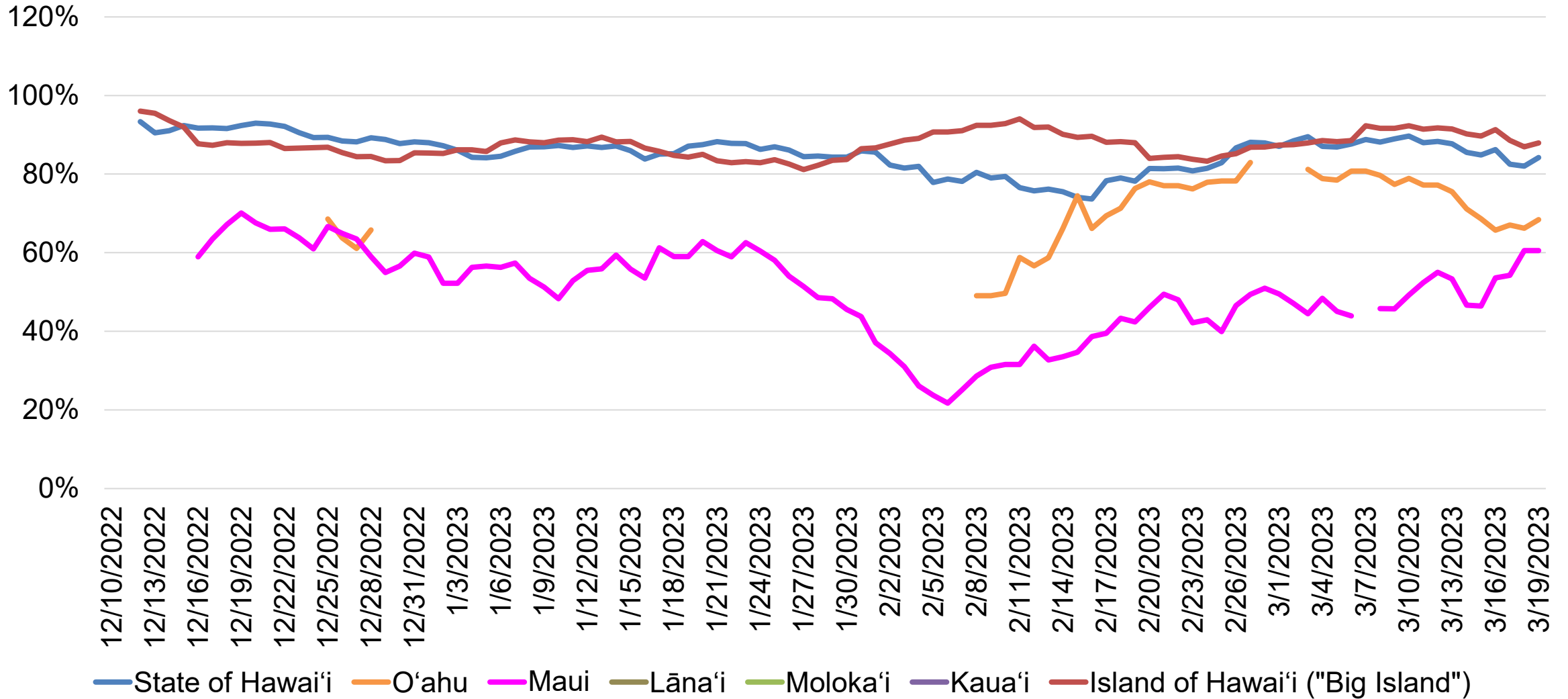
Korea Consideration Two-Week Moving Average



Source: Vision Insights Data as of March 30, 2023

Samples for O'ahu, Kaua'i, Moloka'i, and Lāna'i are limited

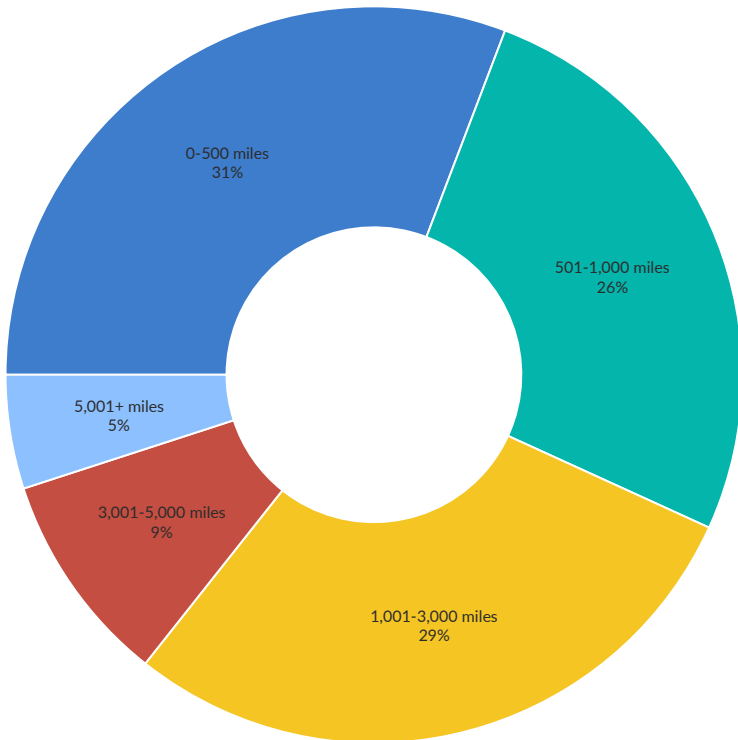
Korea Favorability Two-Week Moving Average



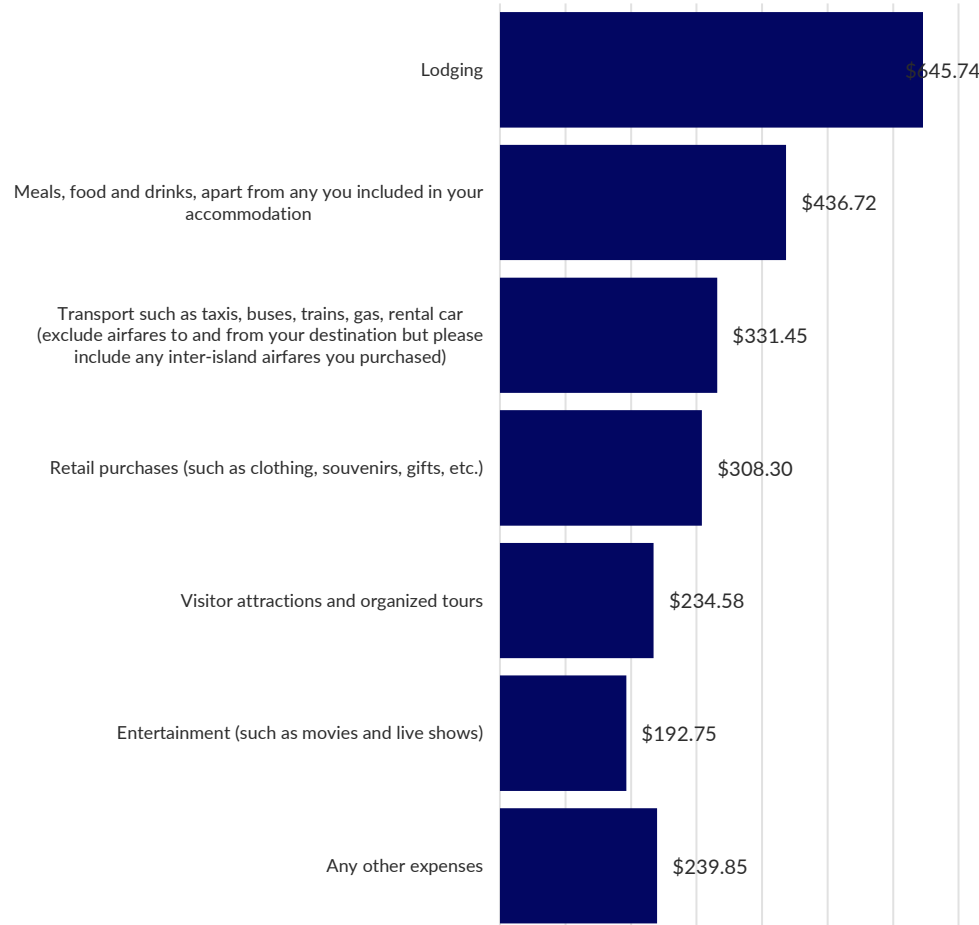
Source: Vision Insights Data as of March 30, 2023

Samples for O'ahu, Kaua'i, Moloka'i, and Lāna'i are limited

Distance Travelled on Annual Vacation



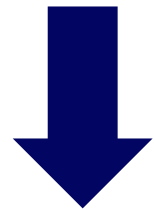
Average Spend



Spend Per Person Per Day

5.6
Ave # Nights on Annual Vacation

3.1
Ave # of People on Annual Vacation



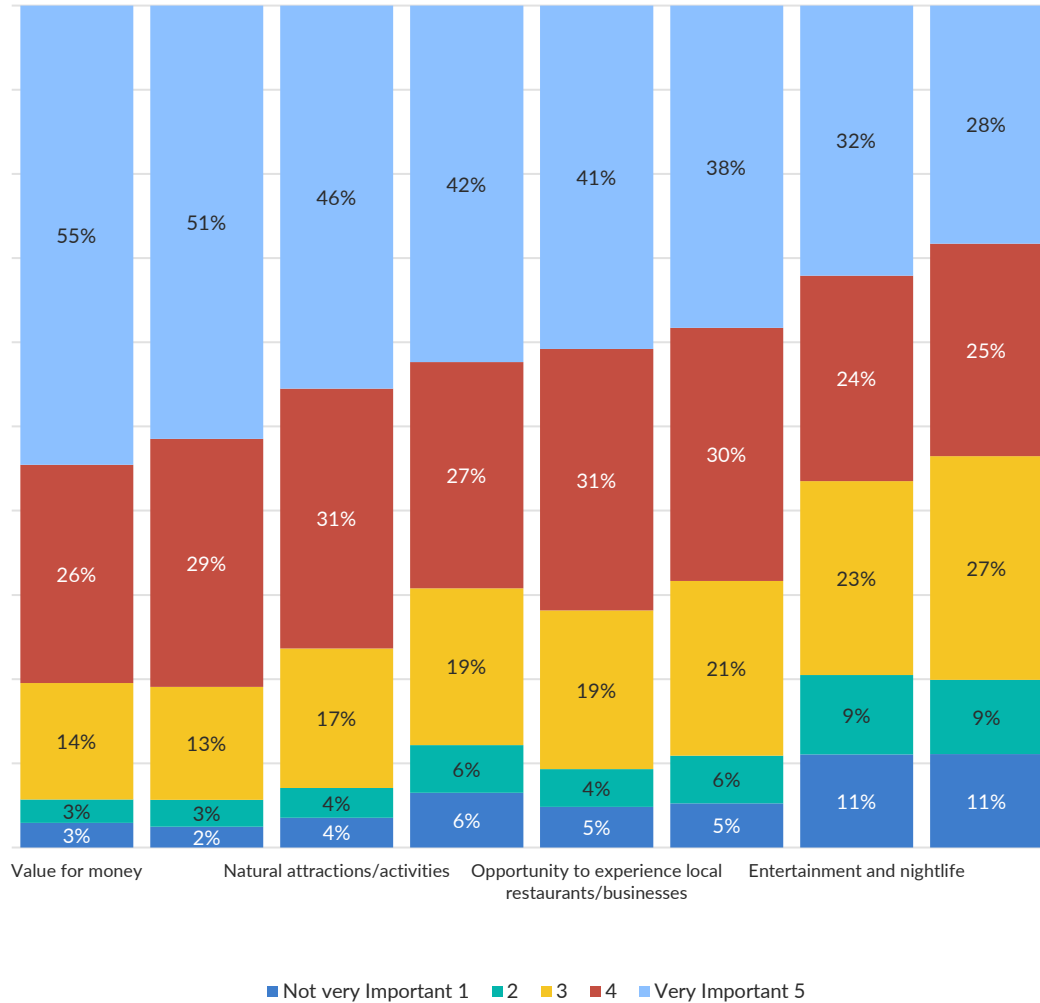
\$138.59

Ave. Per Person Per Day Spend

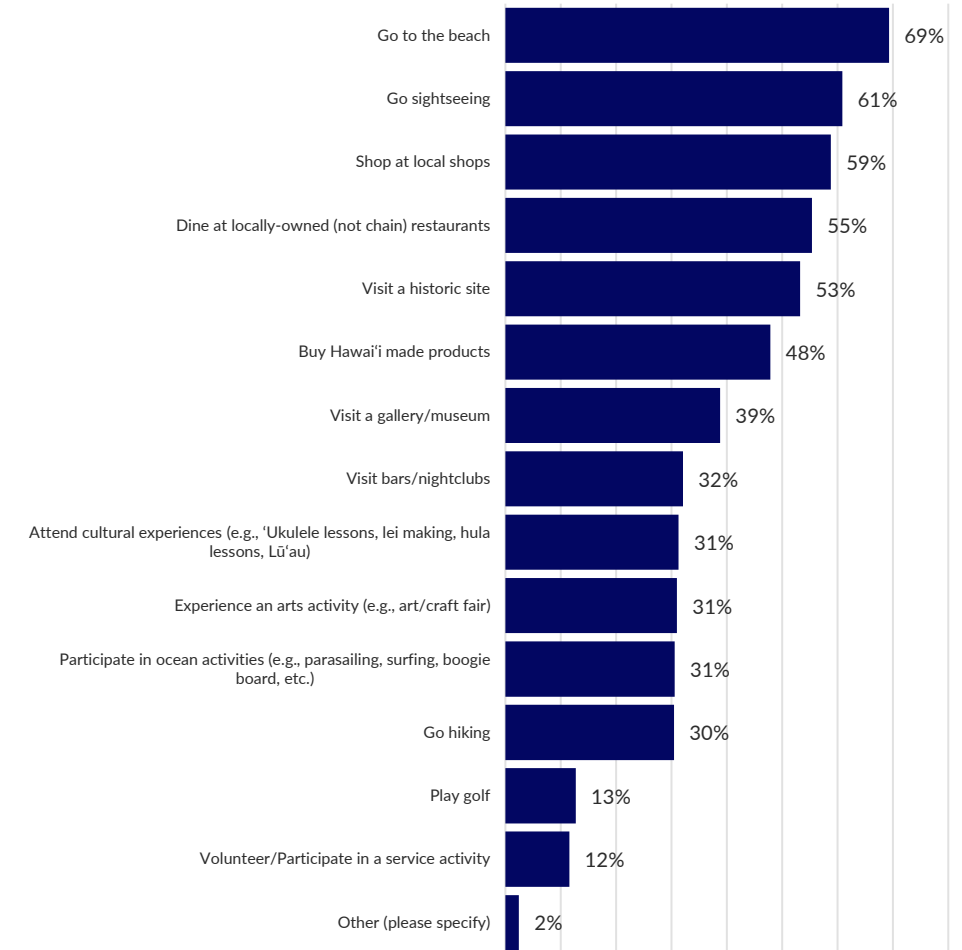
How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

US: Importance of Travel Factors and Activities in Hawai'i

Importance of Travel Factors



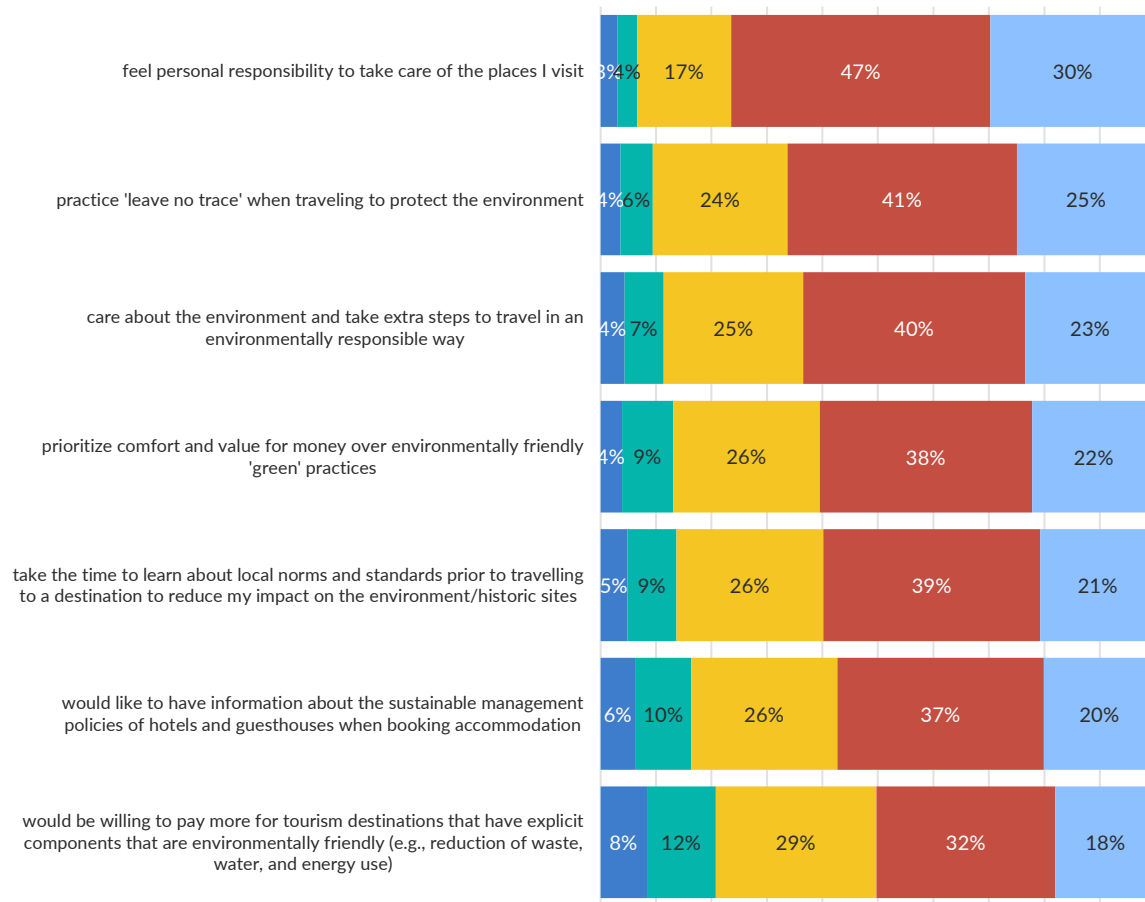
Activities Done in Hawai'i



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 | Which activities would you participate in if you take a trip to Hawai'i? **Select all that apply**

US: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Travelling



■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

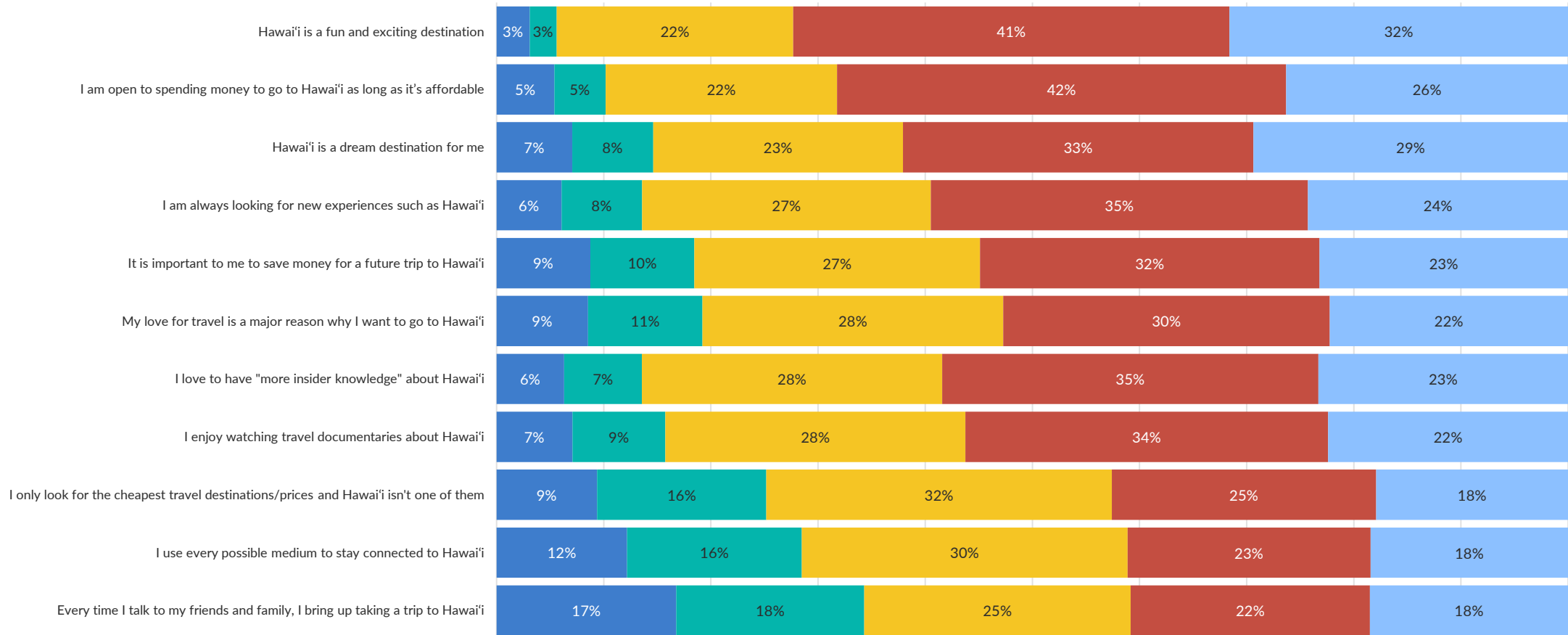
Agreement Regarding Sustaining Local Culture While Travelling



■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

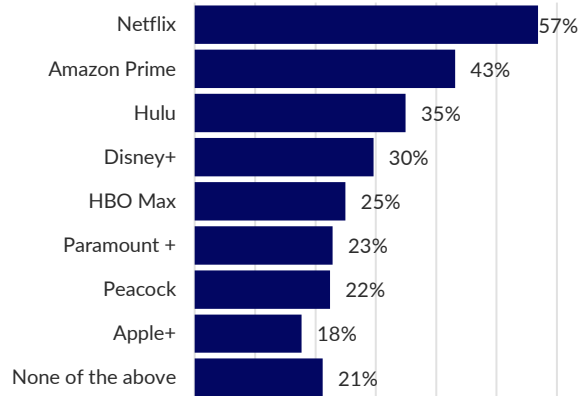
Agreement Regarding Hawai'i as a Travel Destination



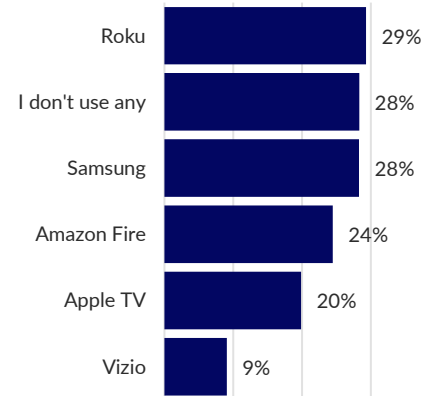
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

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

Streaming Platforms used Weekly



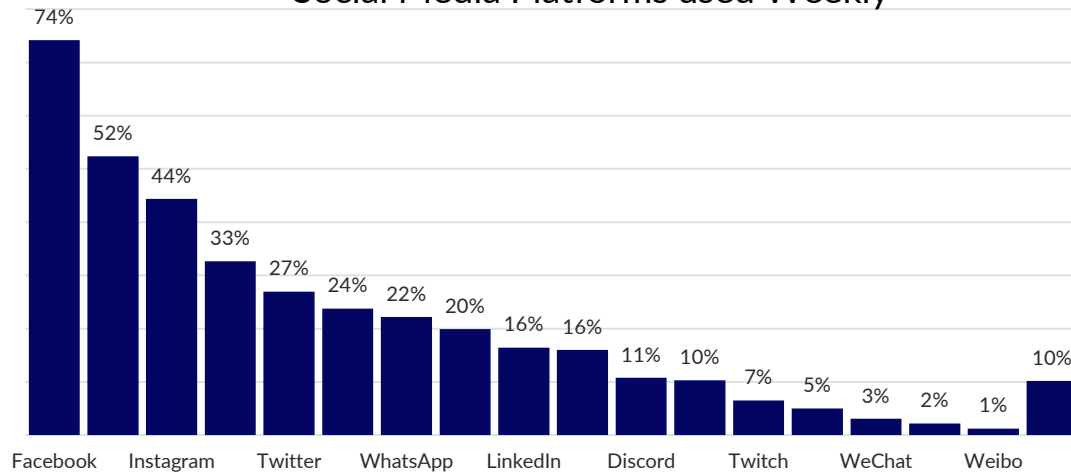
Connected Device Used



Travel Destination Source of Awareness

TV Program/Documentary	23%
Online	35%
Radio	11%
TV commercials	31%
Newspaper	13%
Friends/Family	44%
Social Media	37%
YouTube	33%
Out of home advertising (e.g. Poster Billboards, bus shelter advertisements, etc.)	10%
Email	20%
I don't recall	12%

Social Media Platforms used Weekly



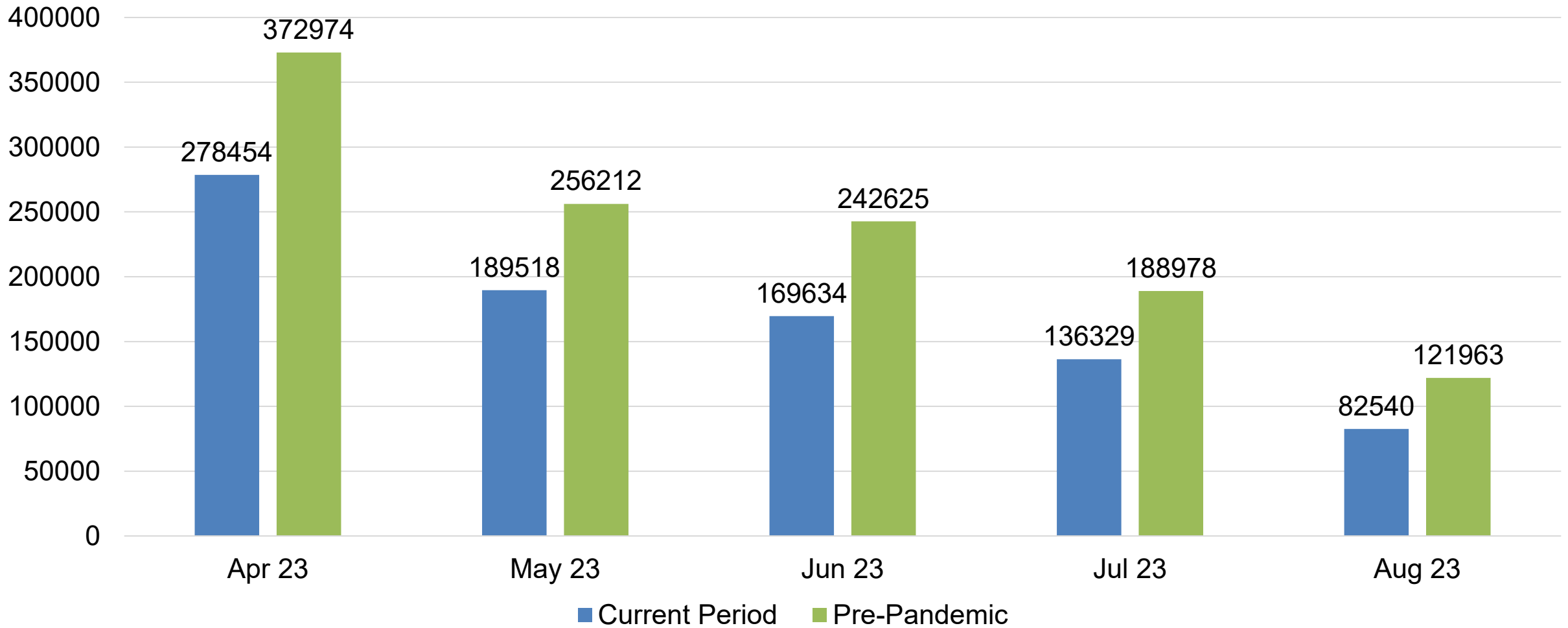
Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	32%
I search for information about the destination online	44%
I look up the destination on social media	24%
I talk to friends/family about the destination	35%
I book travel to the destination almost immediately	16%
I don't do anything	17%
None of the above	8%

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

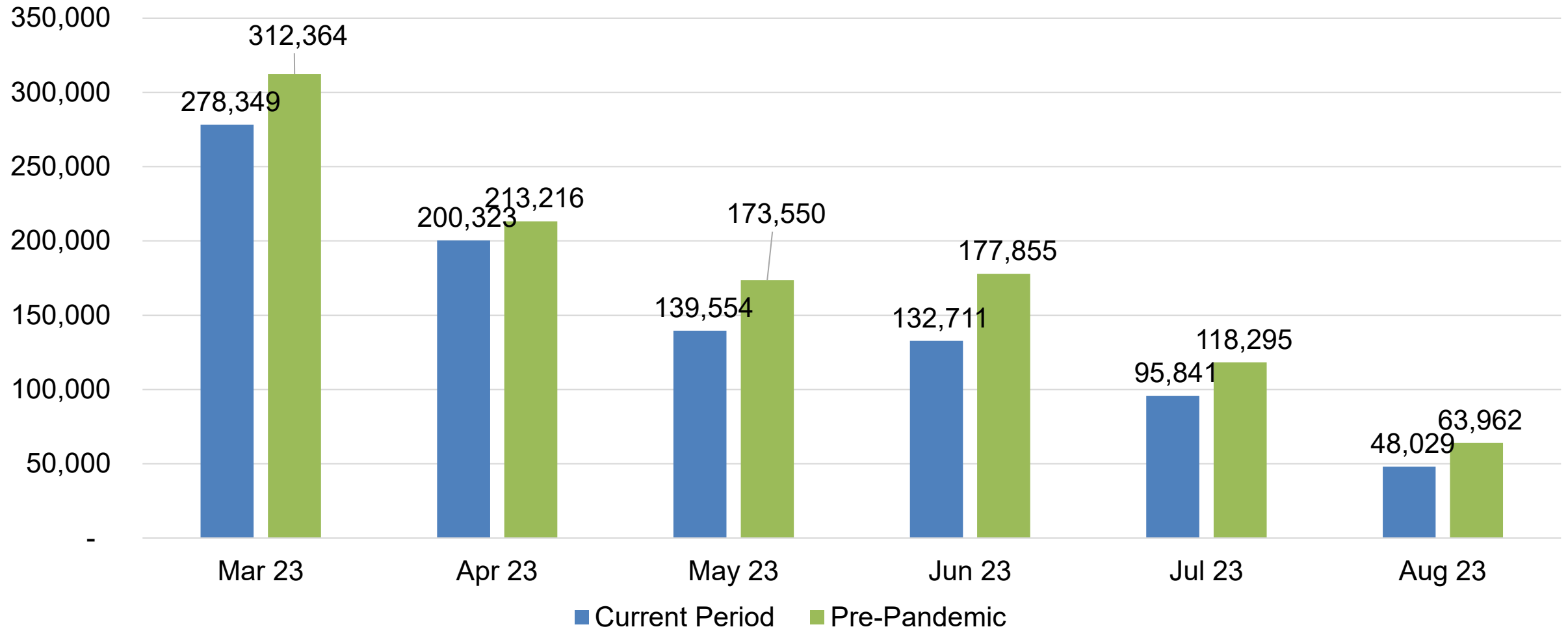
ARC/FORWARDKEYS DESTINATION GATEWAY TRENDS

Six Month Outlook: All Origins



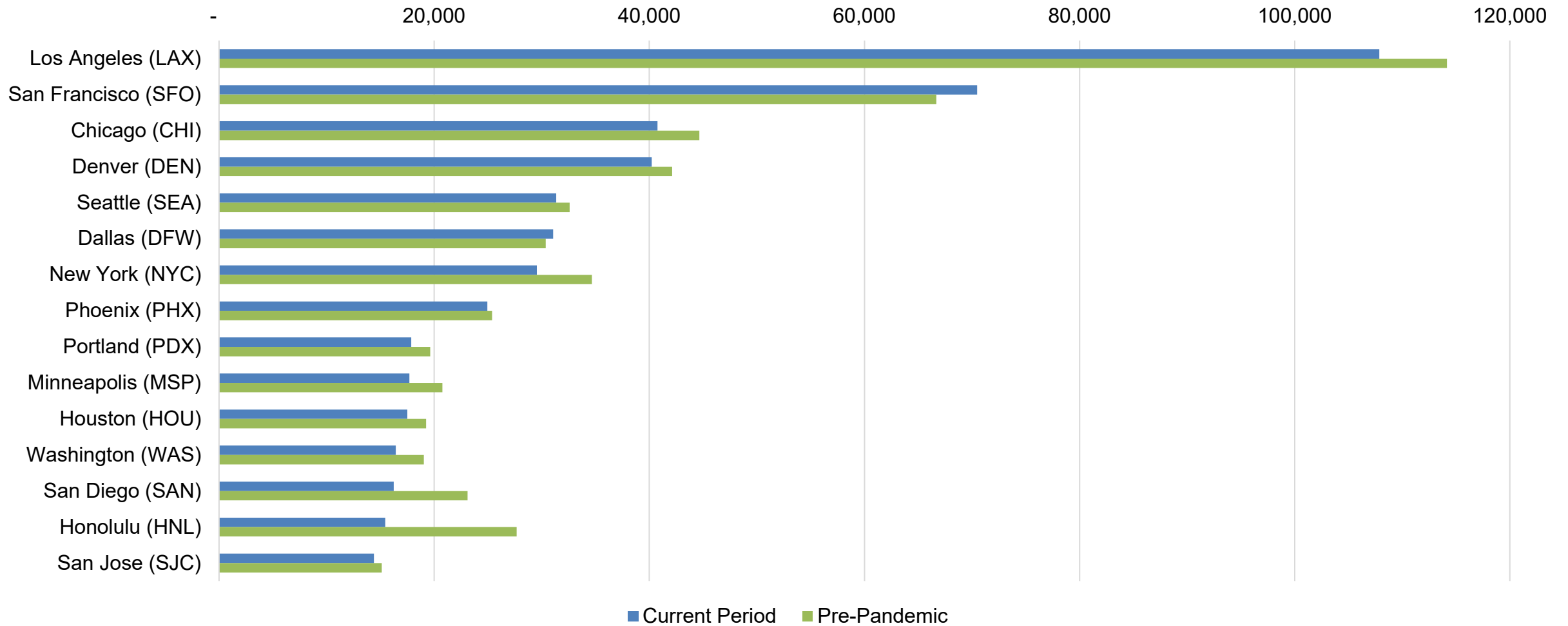
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway

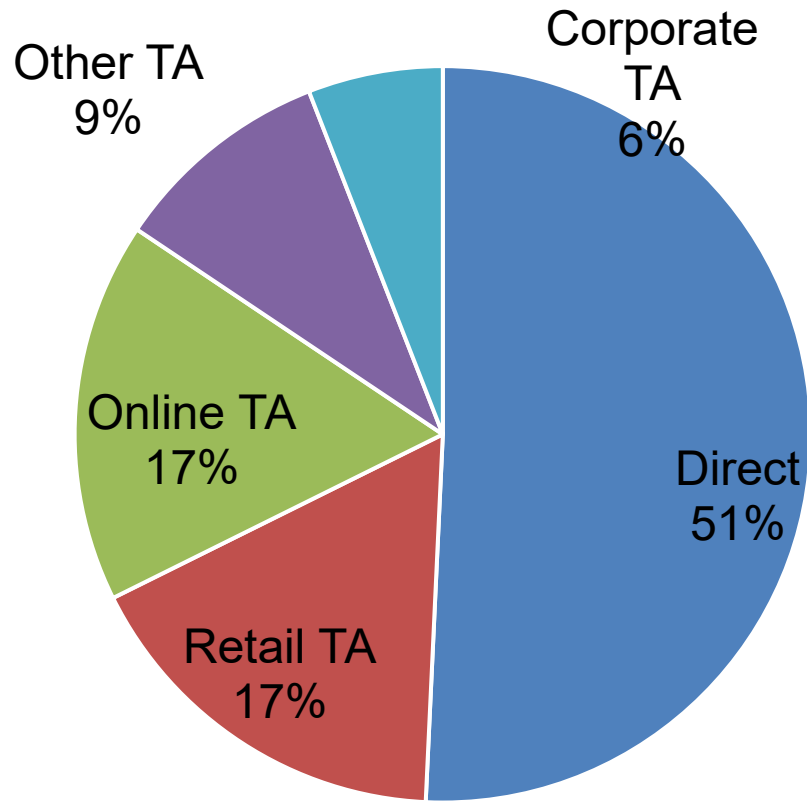
Trip Origins: United States



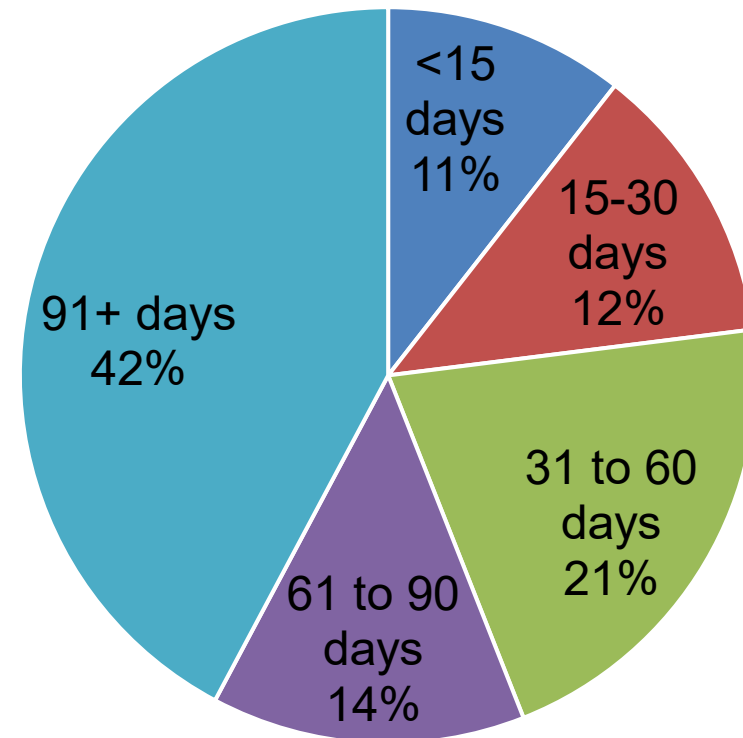
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: United States

Distribution Channel

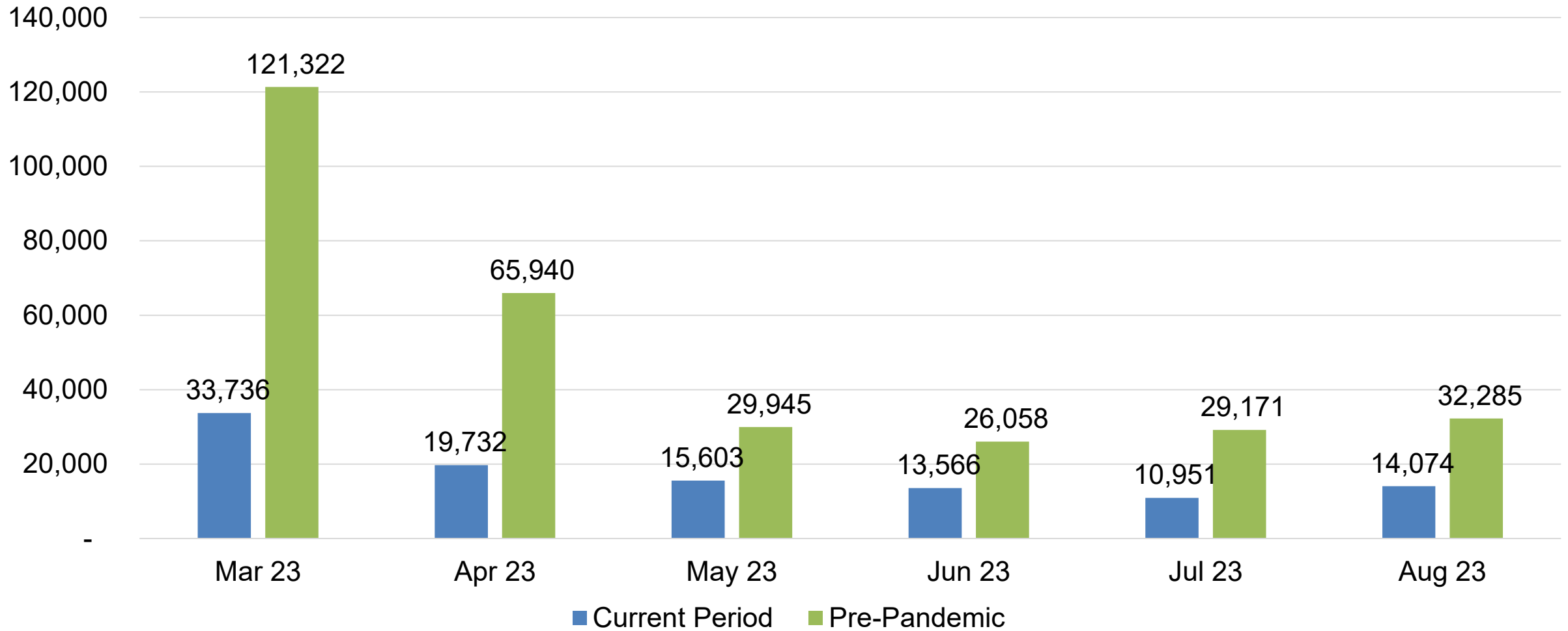


Lead Times



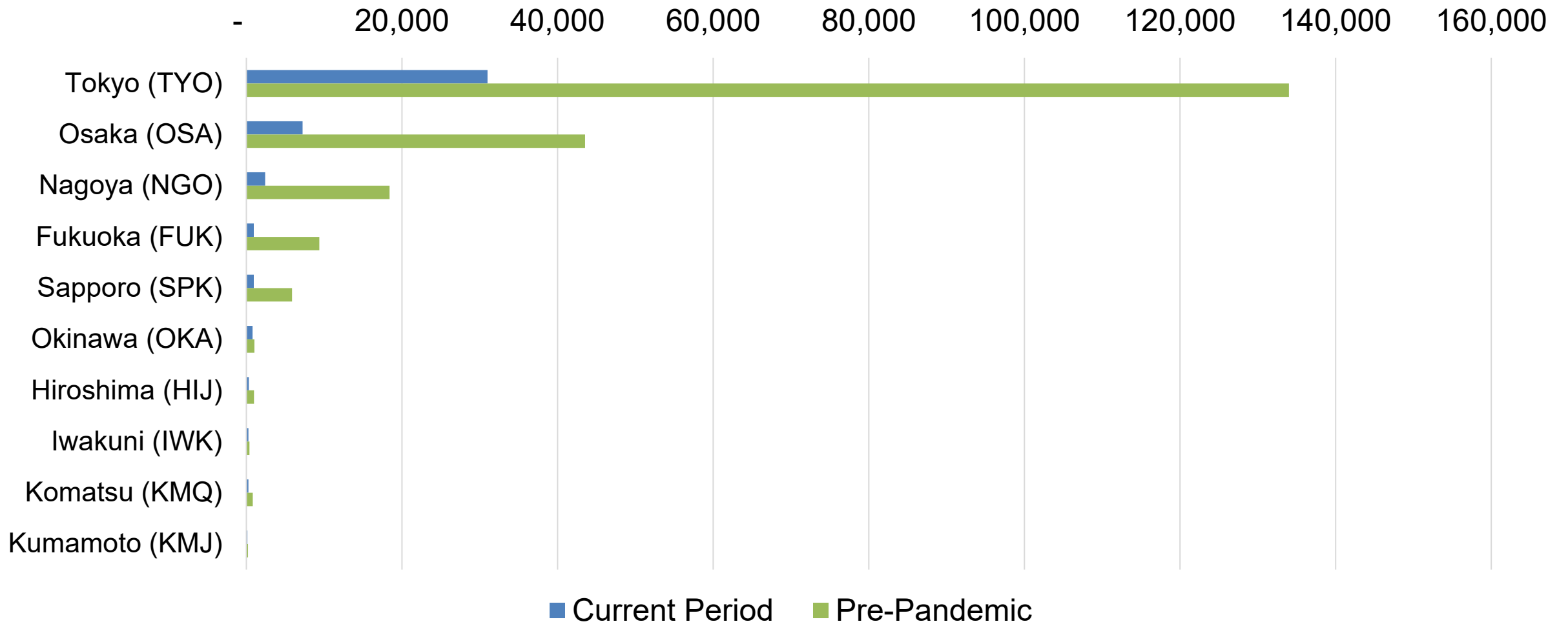
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Japan



Source: ARC/ForwardKeys Destination Gateway

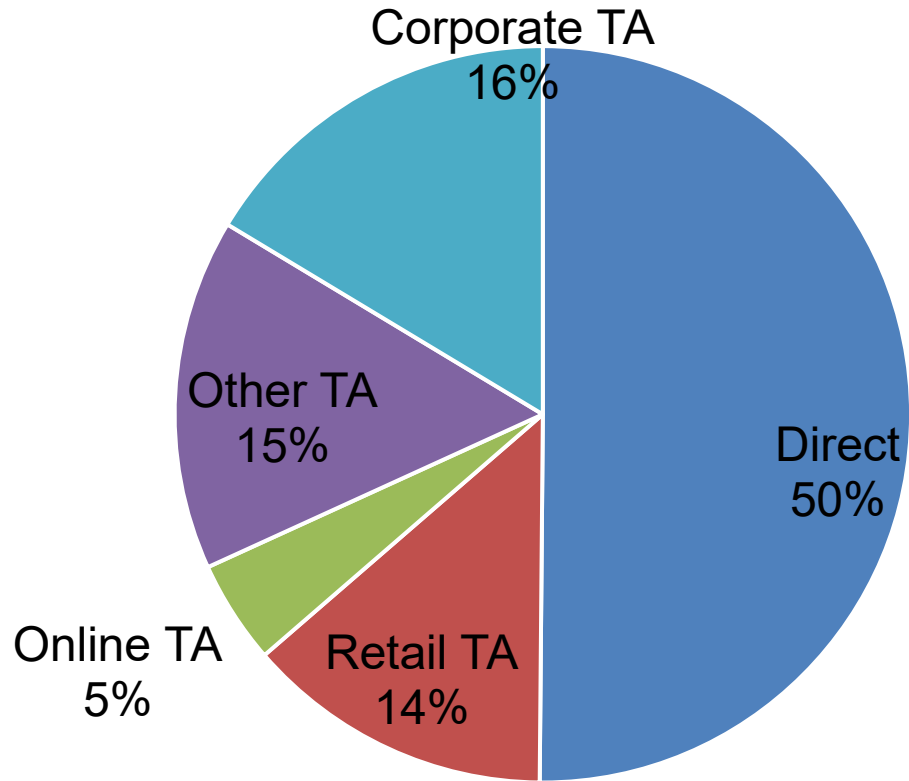
Trip Origins: Japan



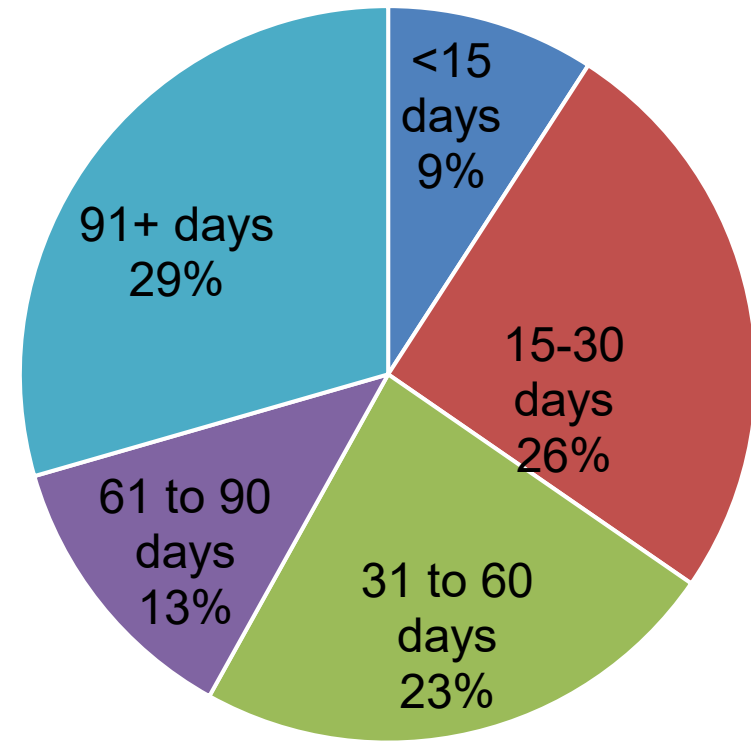
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Japan

Distribution Channel

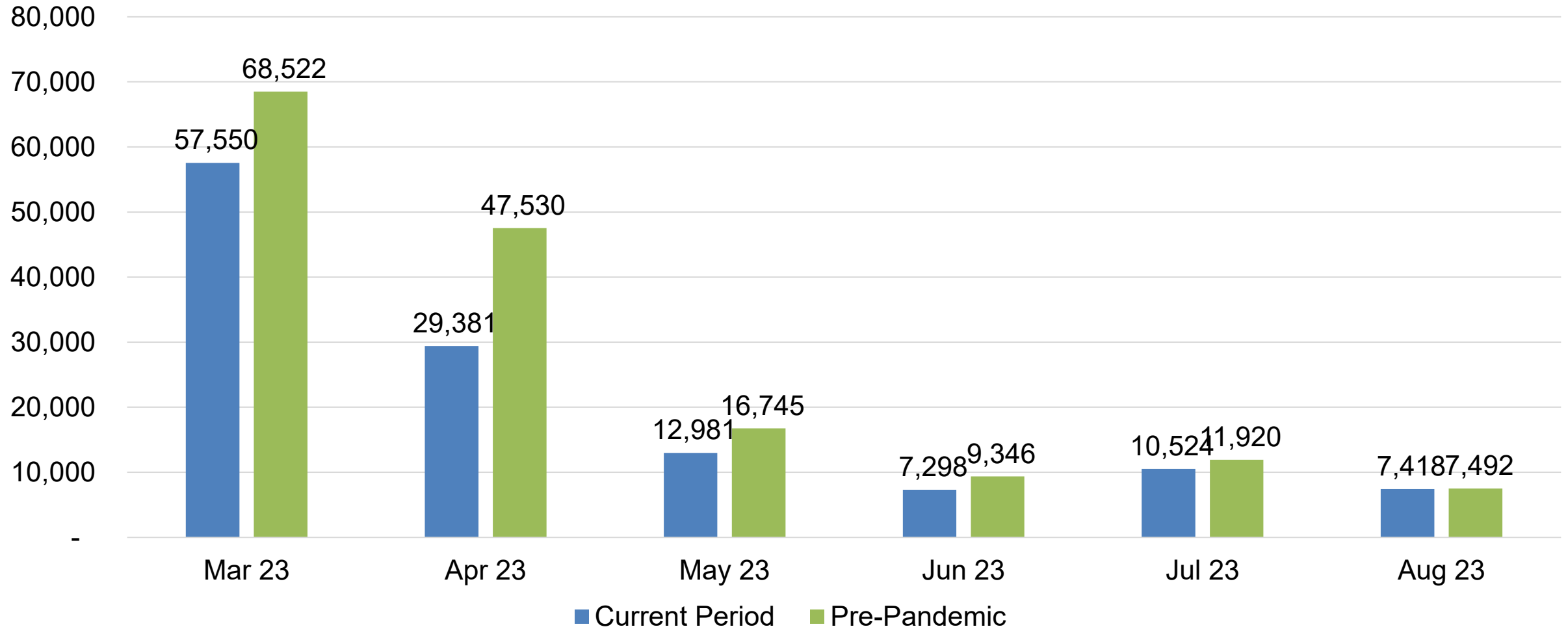


Lead Time



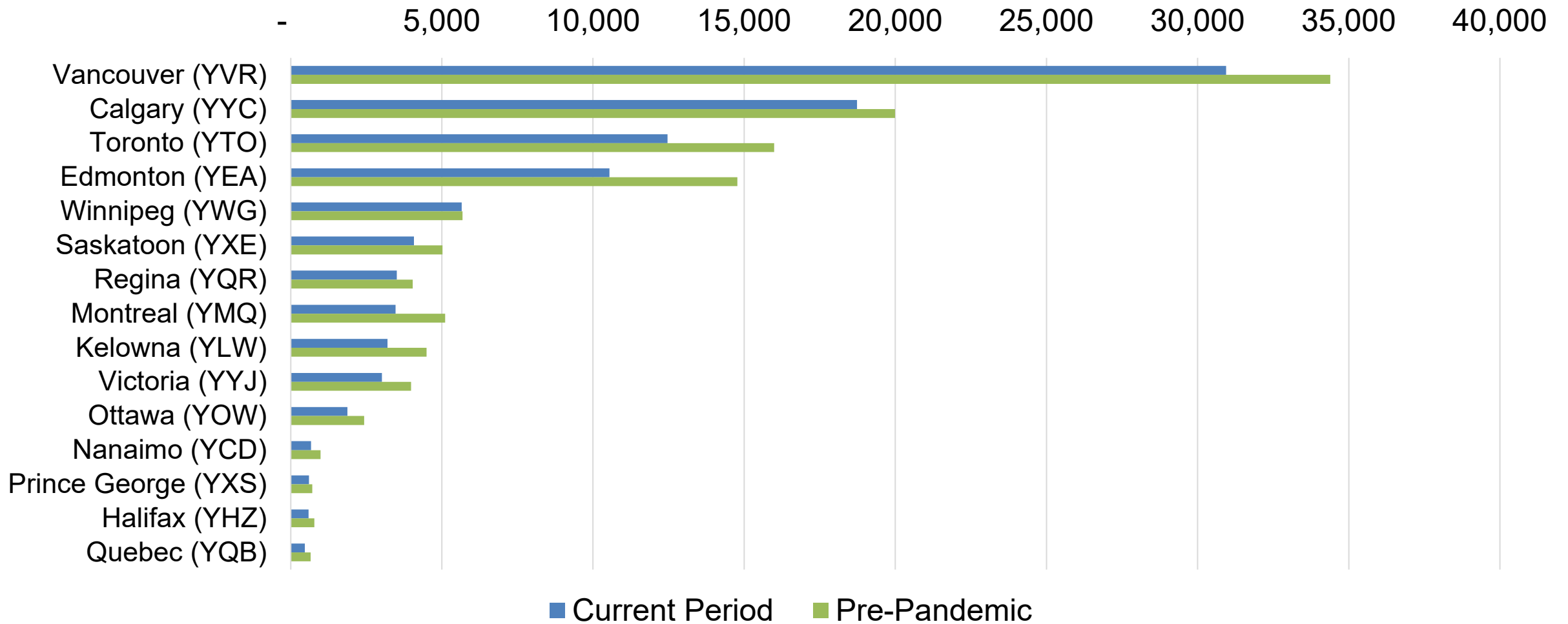
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway

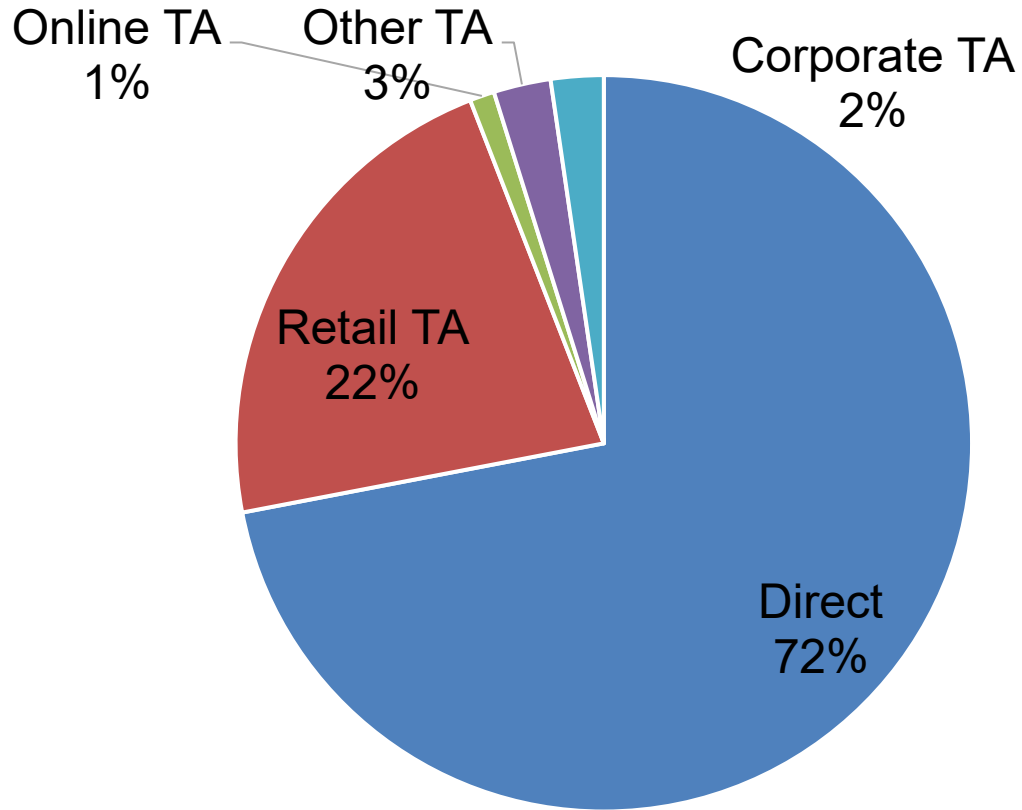
Trip Origins: Canada



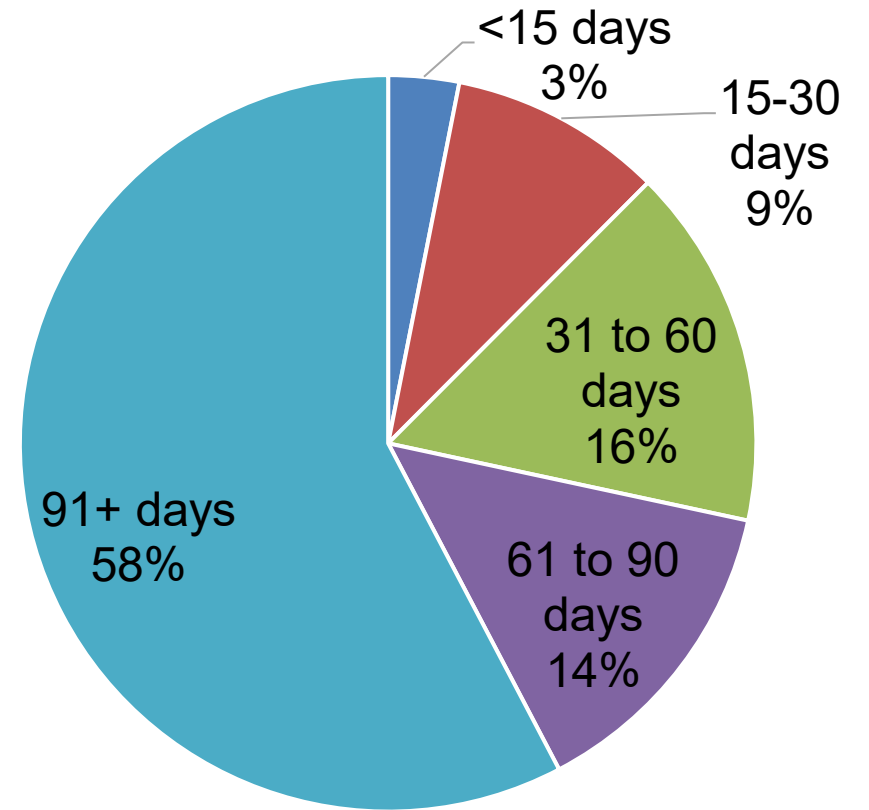
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Trip Characteristics: Canada

Distribution Channel

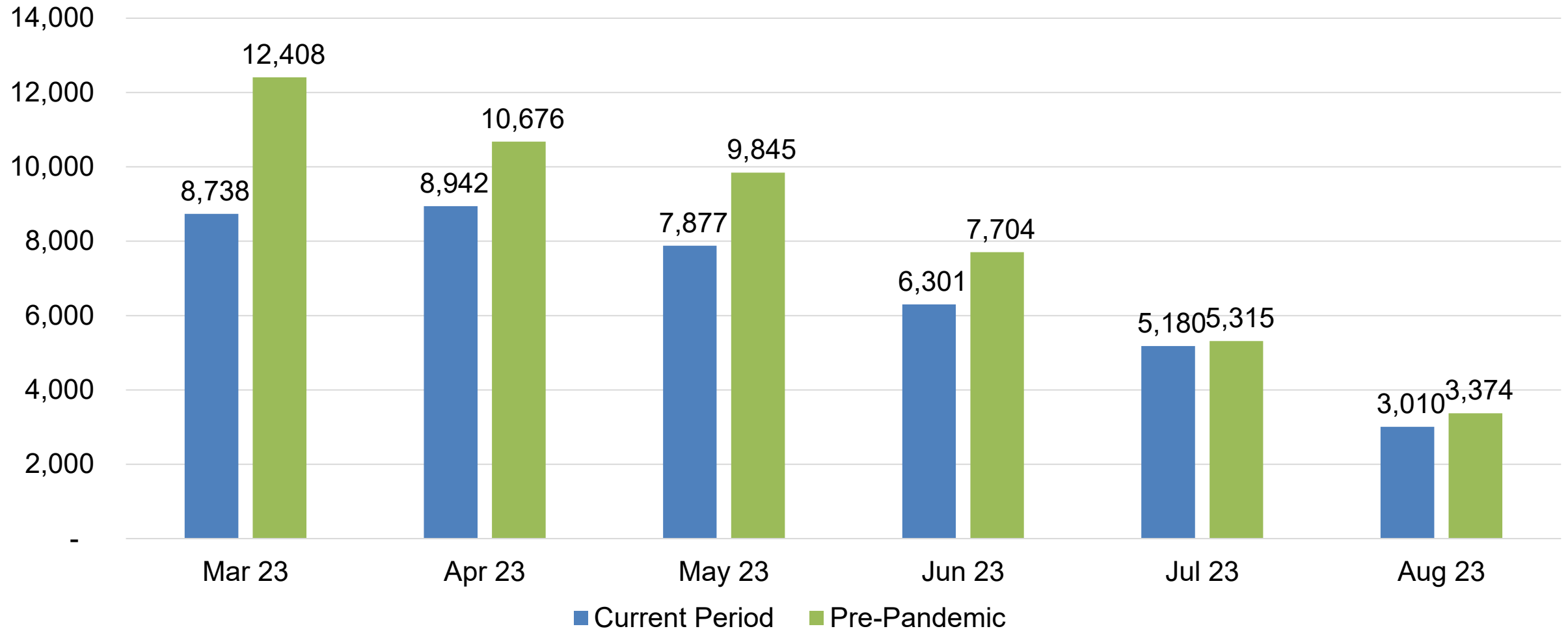


Lead Time



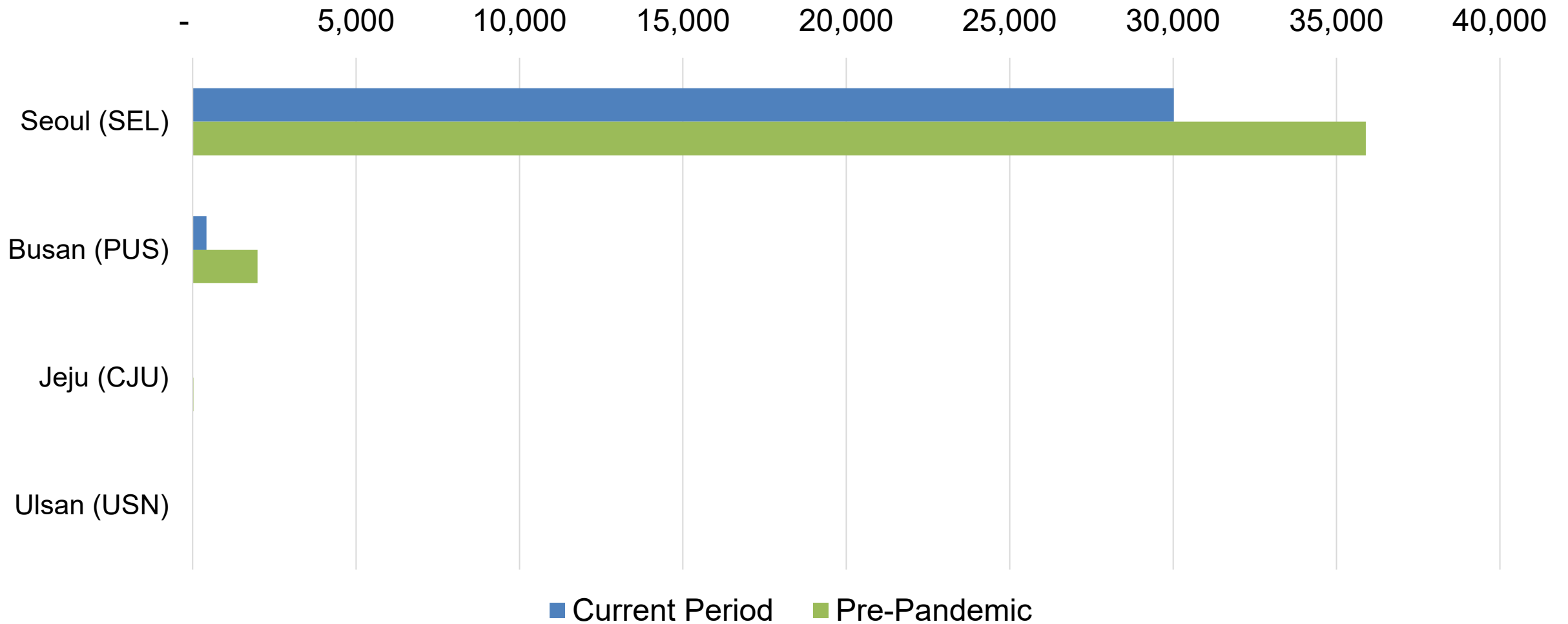
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Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway

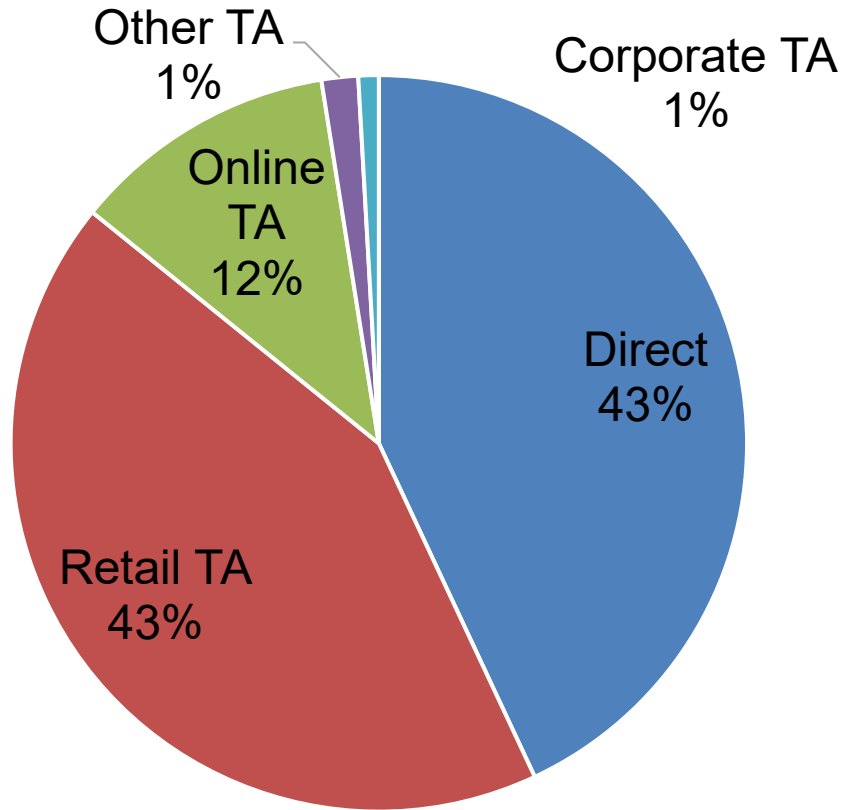
Trip Origins: Korea



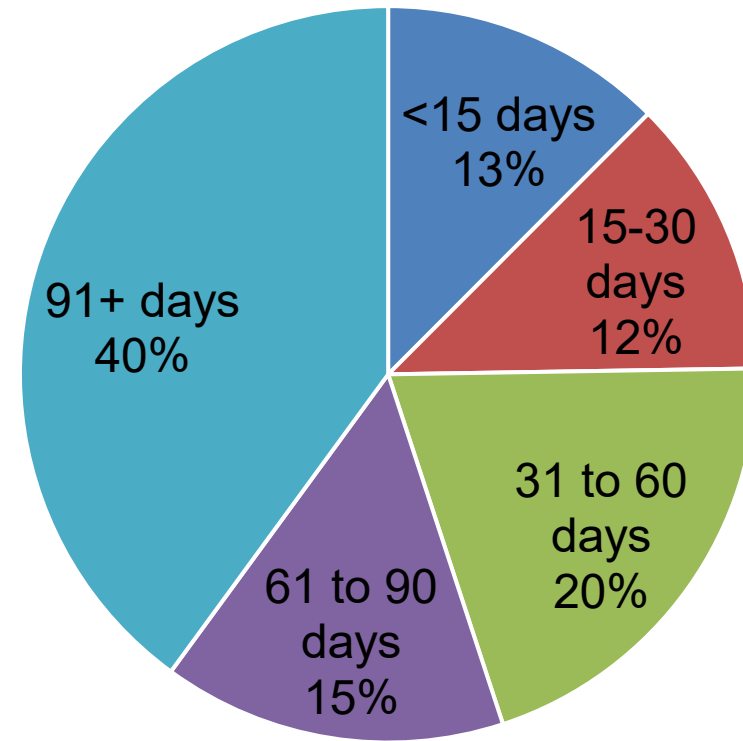
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Trip Characteristics: Korea

Distribution Channel

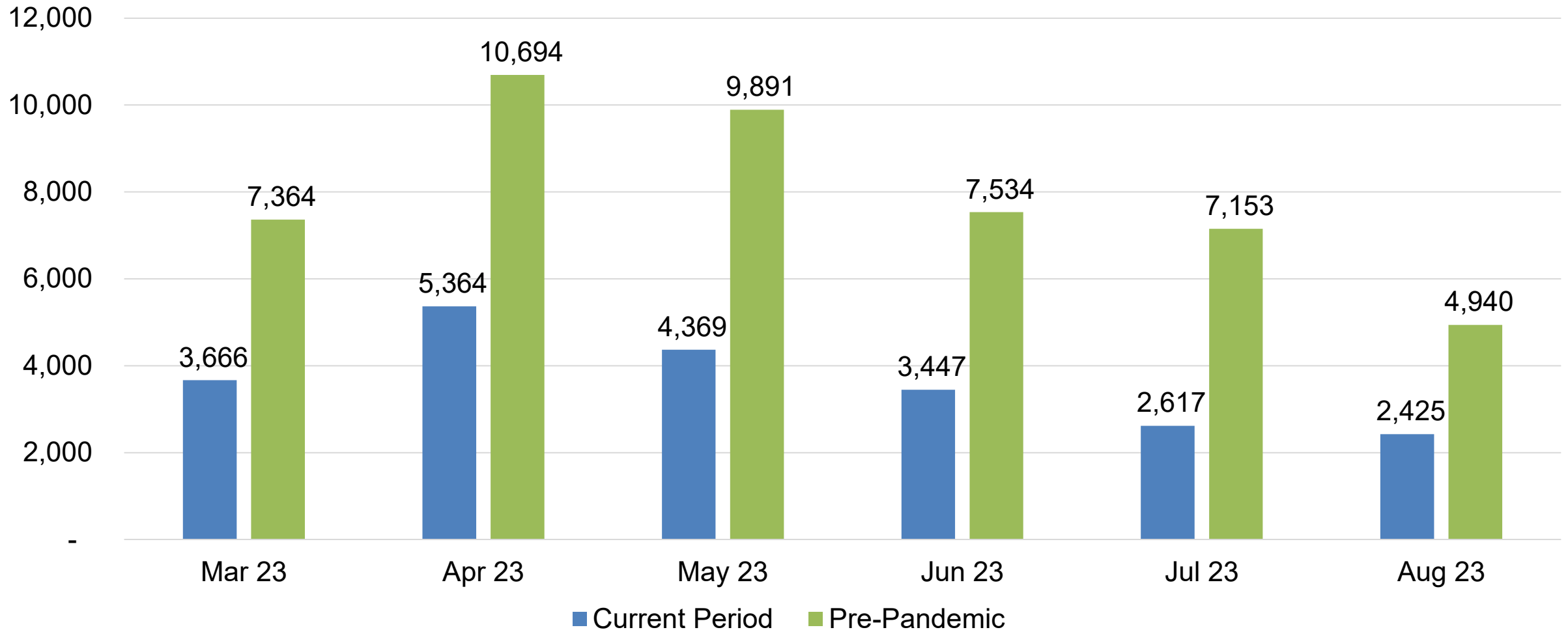


Lead Time



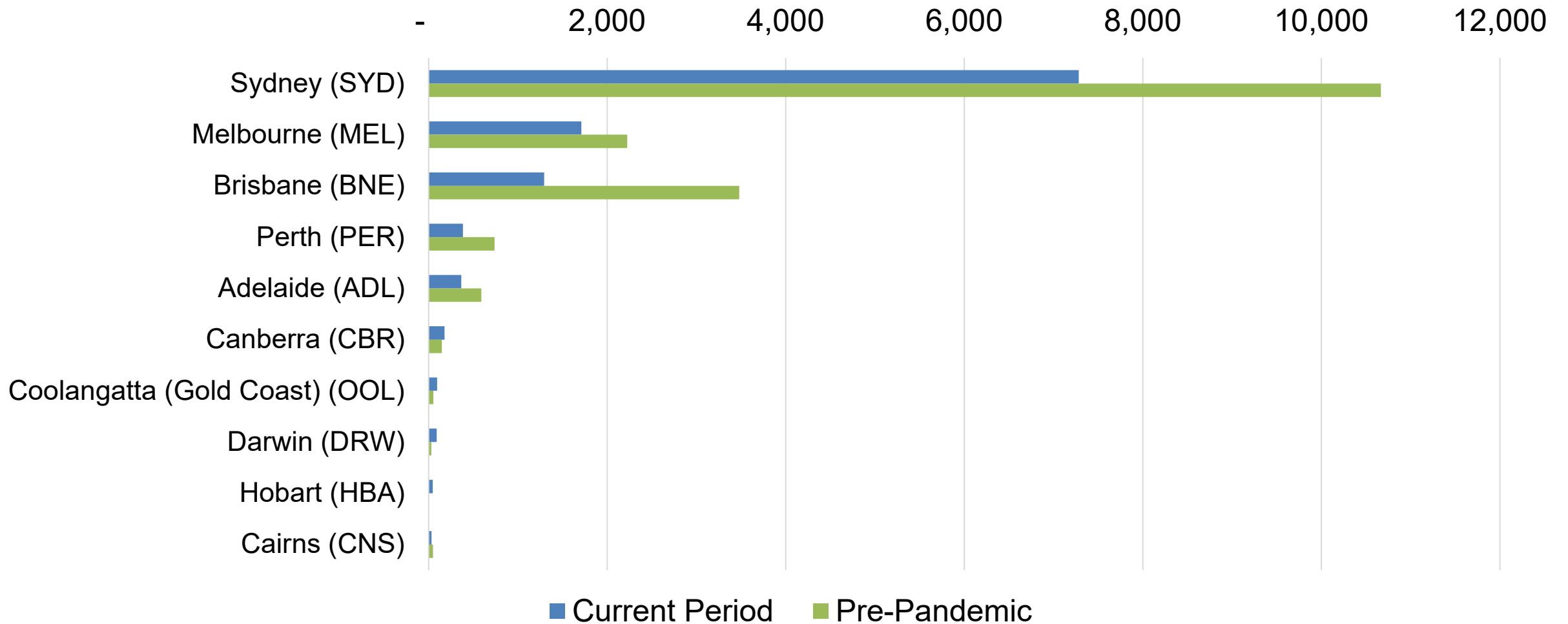
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Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

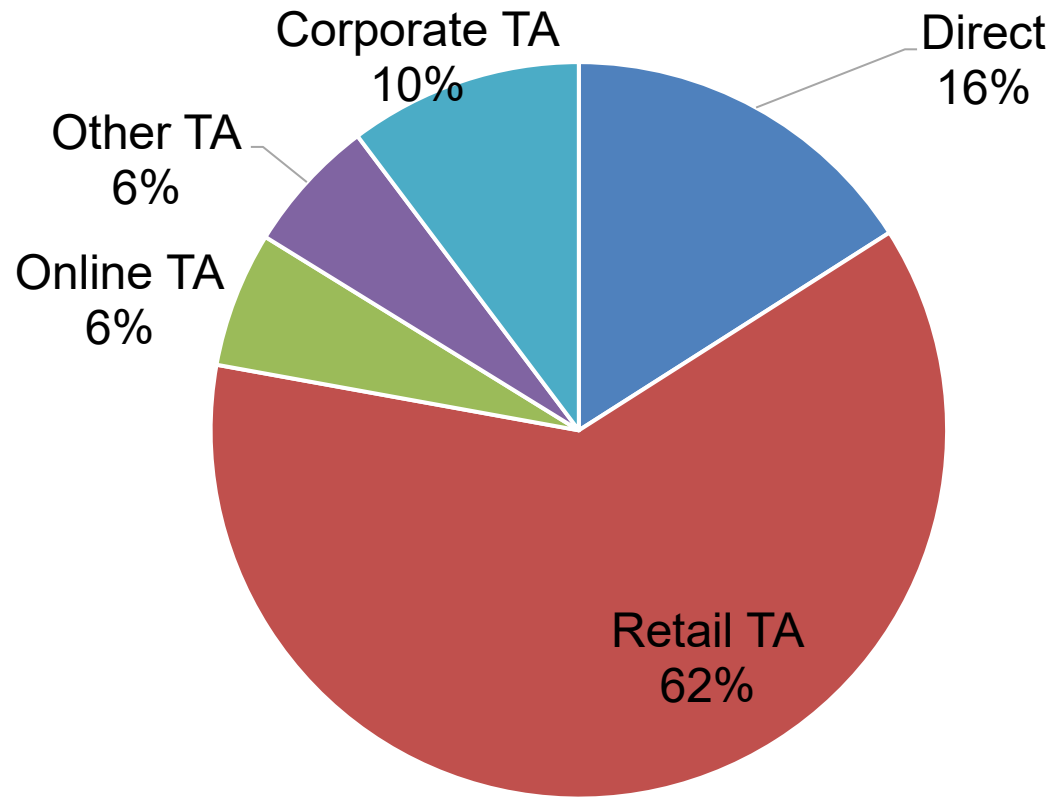
Trip Origins: Australia



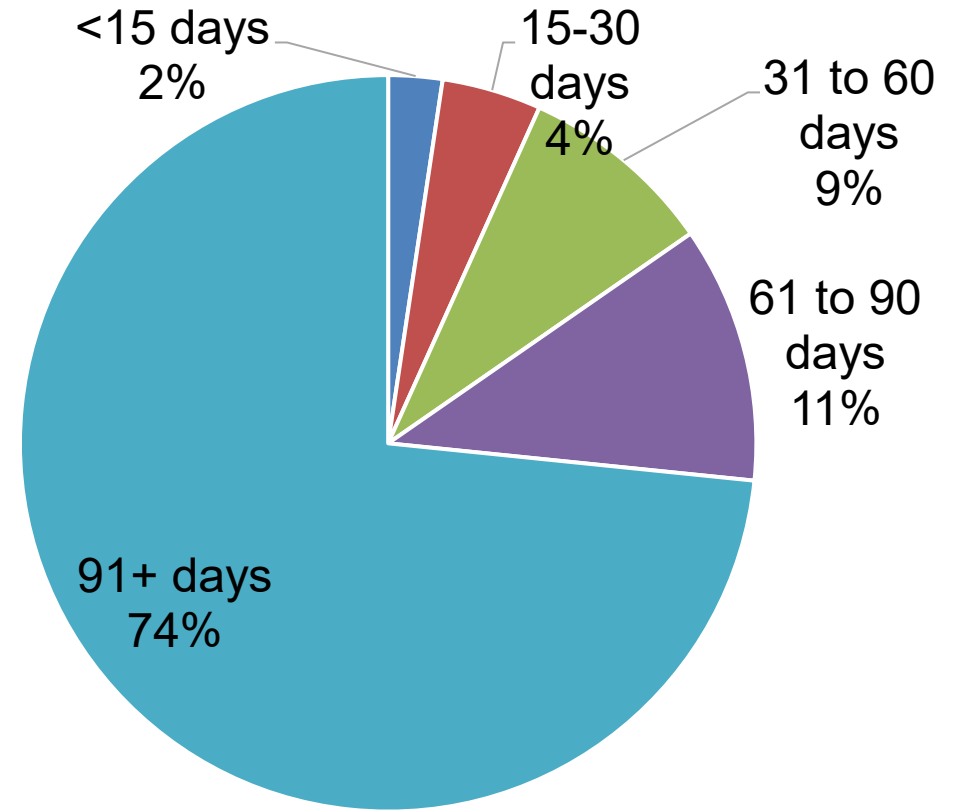
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Australia

Distribution Channel



Lead Time



Source: ARC/ForwardKeys Destination Gateway

MAHALO!

