

# 2023 Hawai'i Tourism Conference

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

October 2, 2023

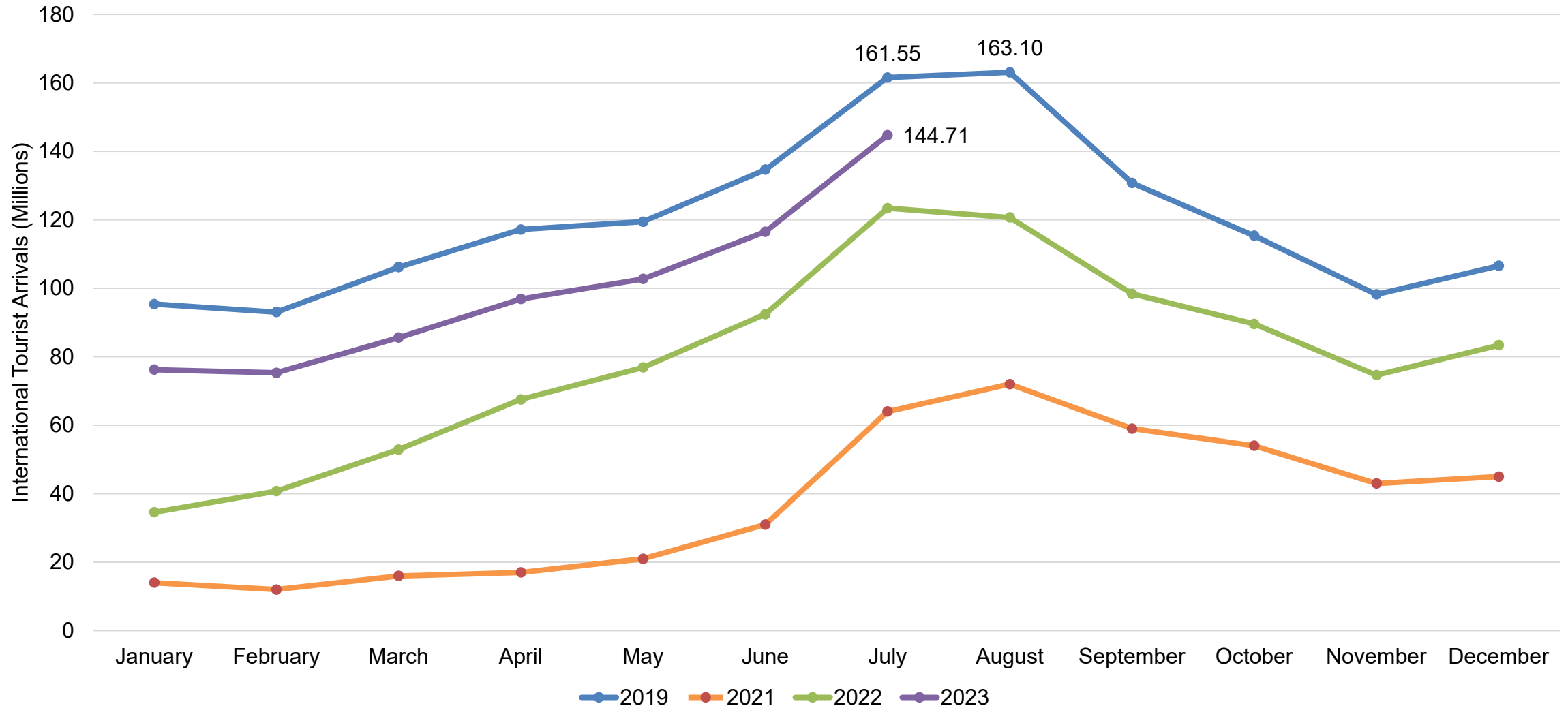
Jennifer Chun

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 large, bold, white letters. Below the acronym, the full name 'STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM' is written in a smaller, white, sans-serif font.**DBEDT**  
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

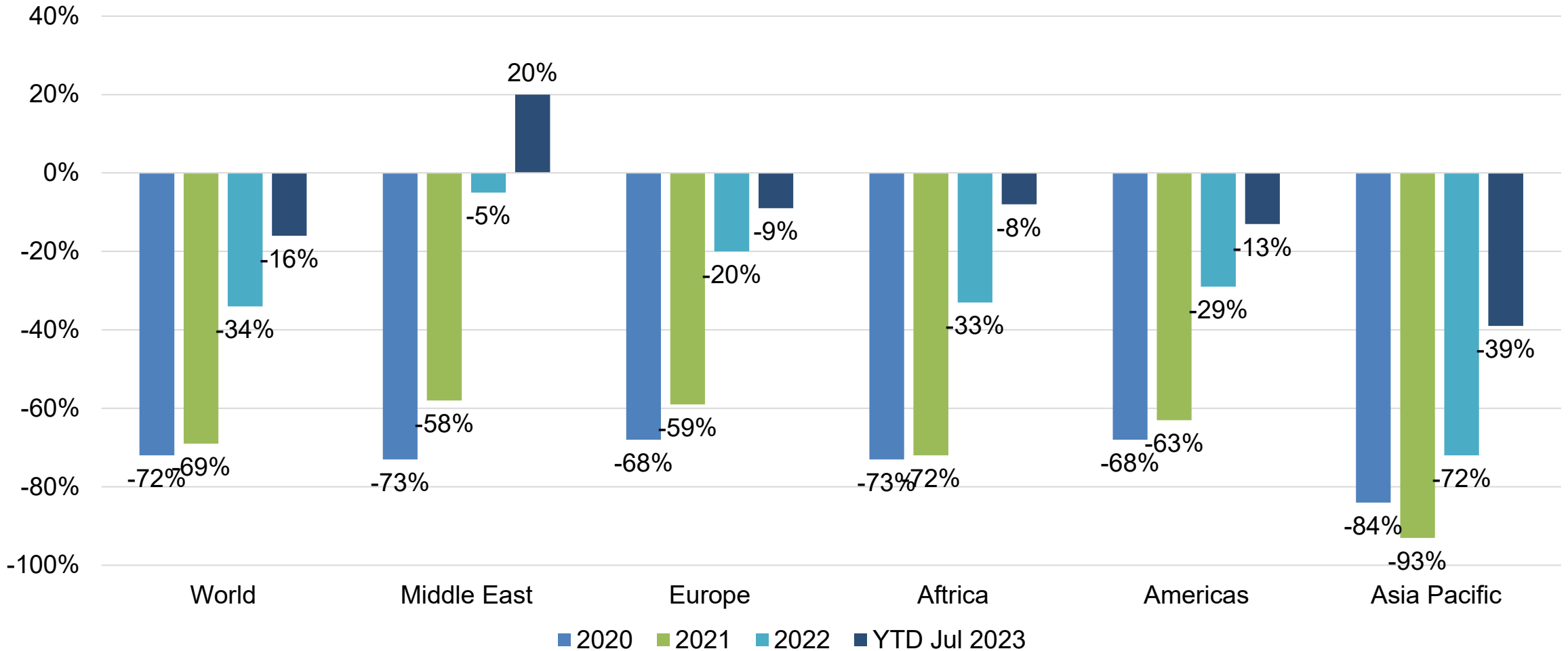
# UNWTO International Tourism Arrivals



Source: UN World Tourism Organization

# UNWTO International Tourism Arrivals

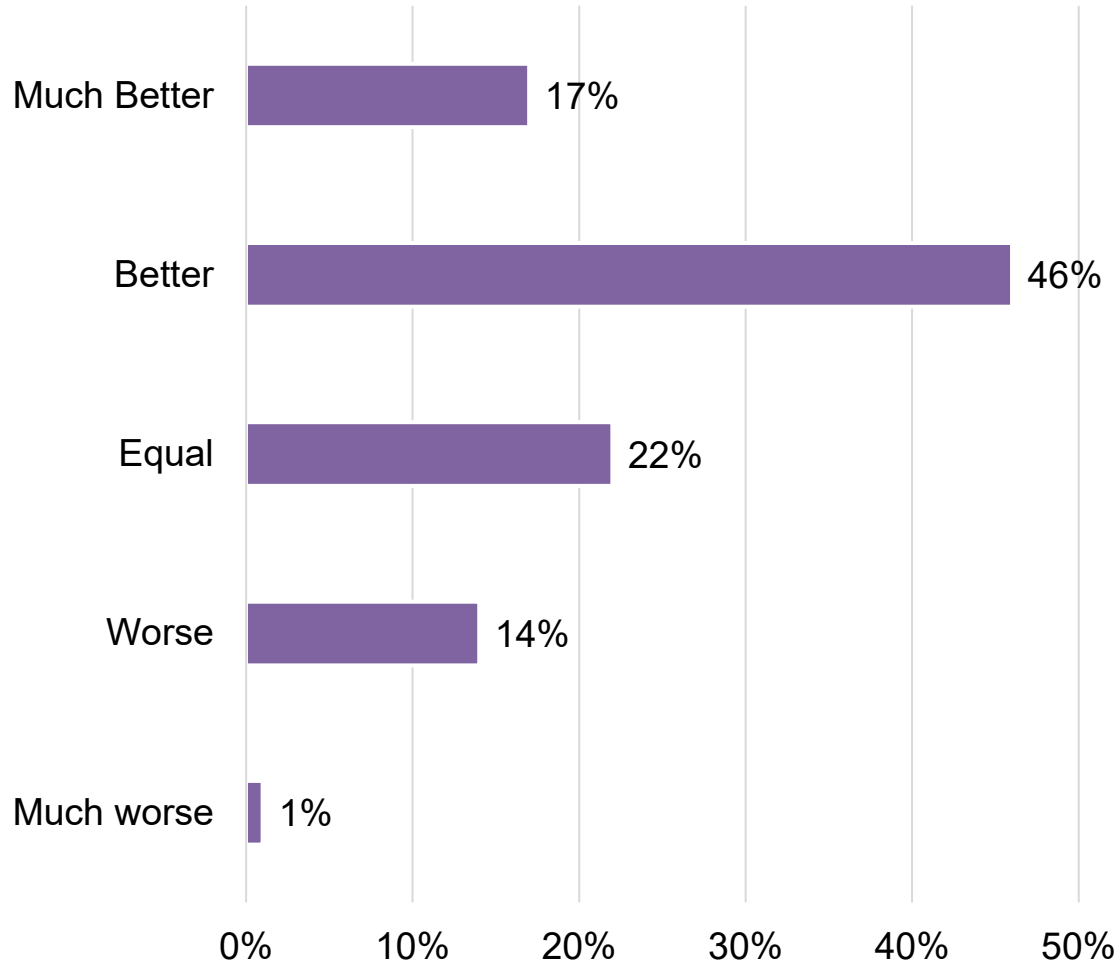
Change by Region vs. 2019



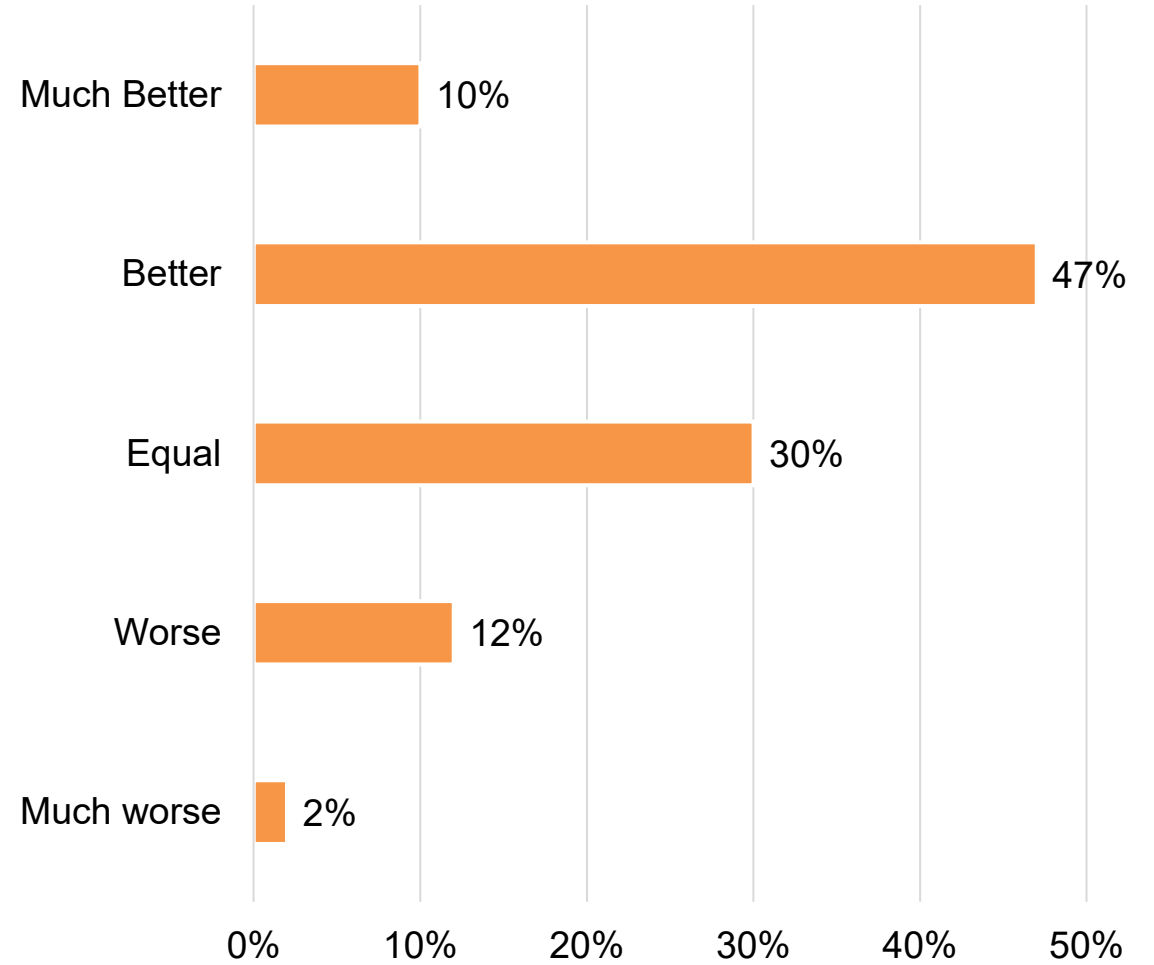
Source: UN World Tourism Organization

# UNWTO Tourism in Your Country

## Evaluation for May - August 2023

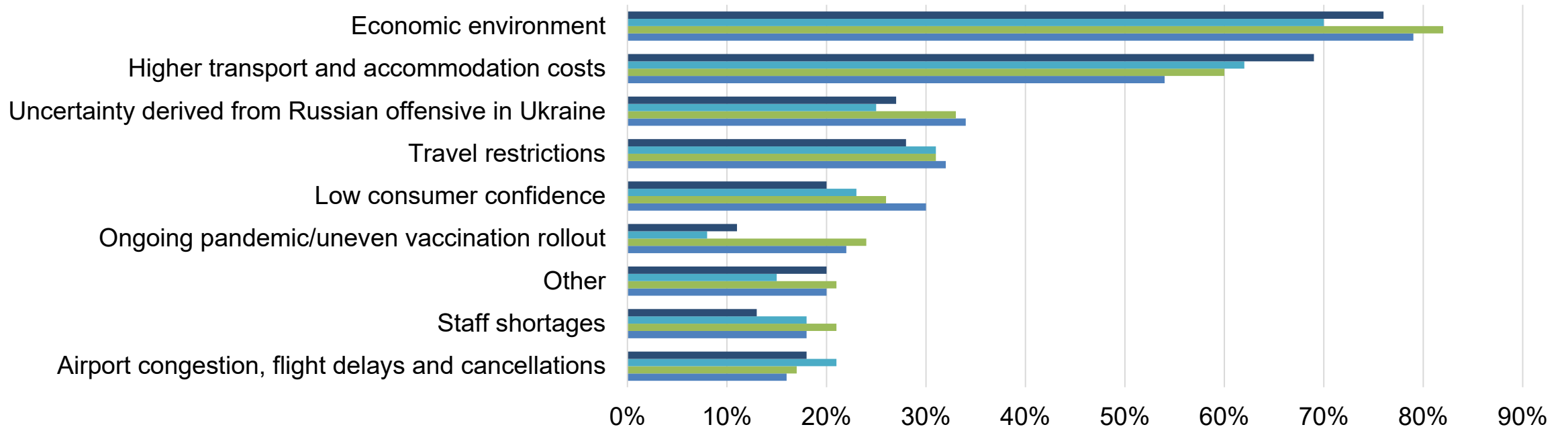


## Prospects for September - December 2023



Source: UN World Tourism Organization, September 2023 Survey of the UNWTO Panel of Tourism Experts

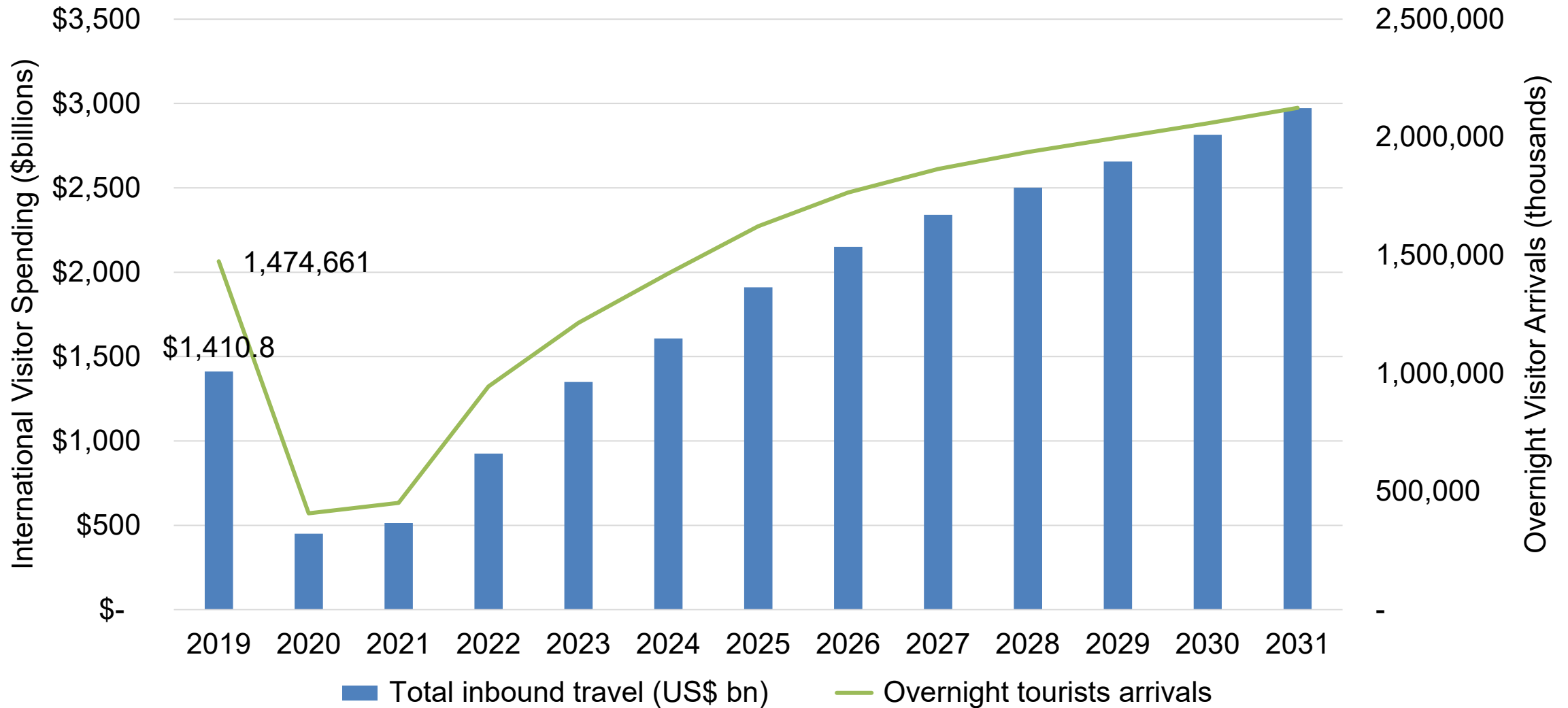
# UNWTO Factors Impacting Recovery of International Tourism



	Airport congestion, flight delays and cancellations	Staff shortages	Other	Ongoing pandemic/uneven vaccination rollout	Low consumer confidence	Travel restrictions	Uncertainty derived from Russian offensive in Ukraine	Higher transport and accommodation costs	Economic environment
■ Sep-23	18%	13%	20%	11%	20%	28%	27%	69%	76%
■ May-23	21%	18%	15%	8%	23%	31%	25%	62%	70%
■ Sep-22	17%	21%	21%	24%	26%	31%	33%	60%	82%
■ Jan-23	16%	18%	20%	22%	30%	32%	34%	54%	79%

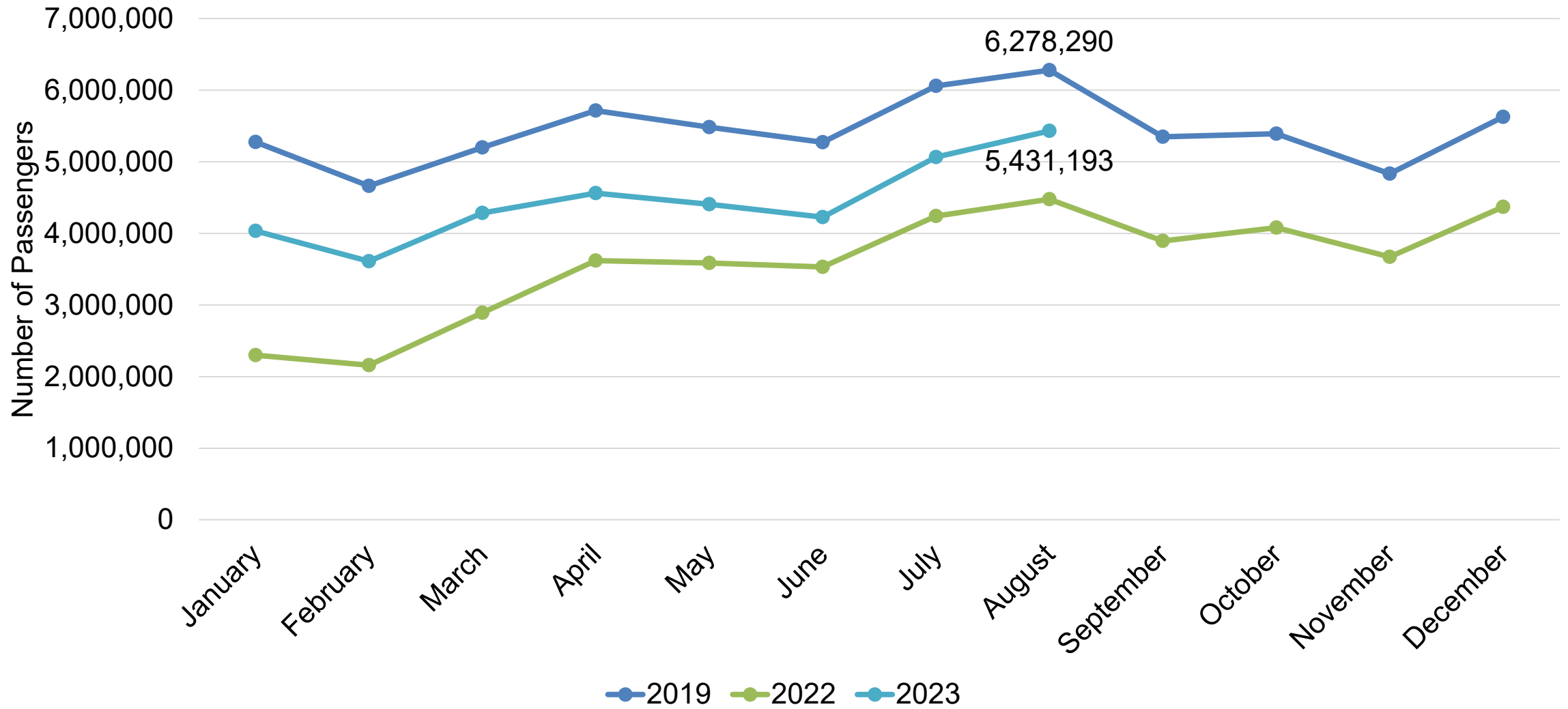
Source: UN World Tourism Organization, September 2023 Survey of the UNWTO Panel of Tourism Experts

# International Arrivals and Spending Forecast



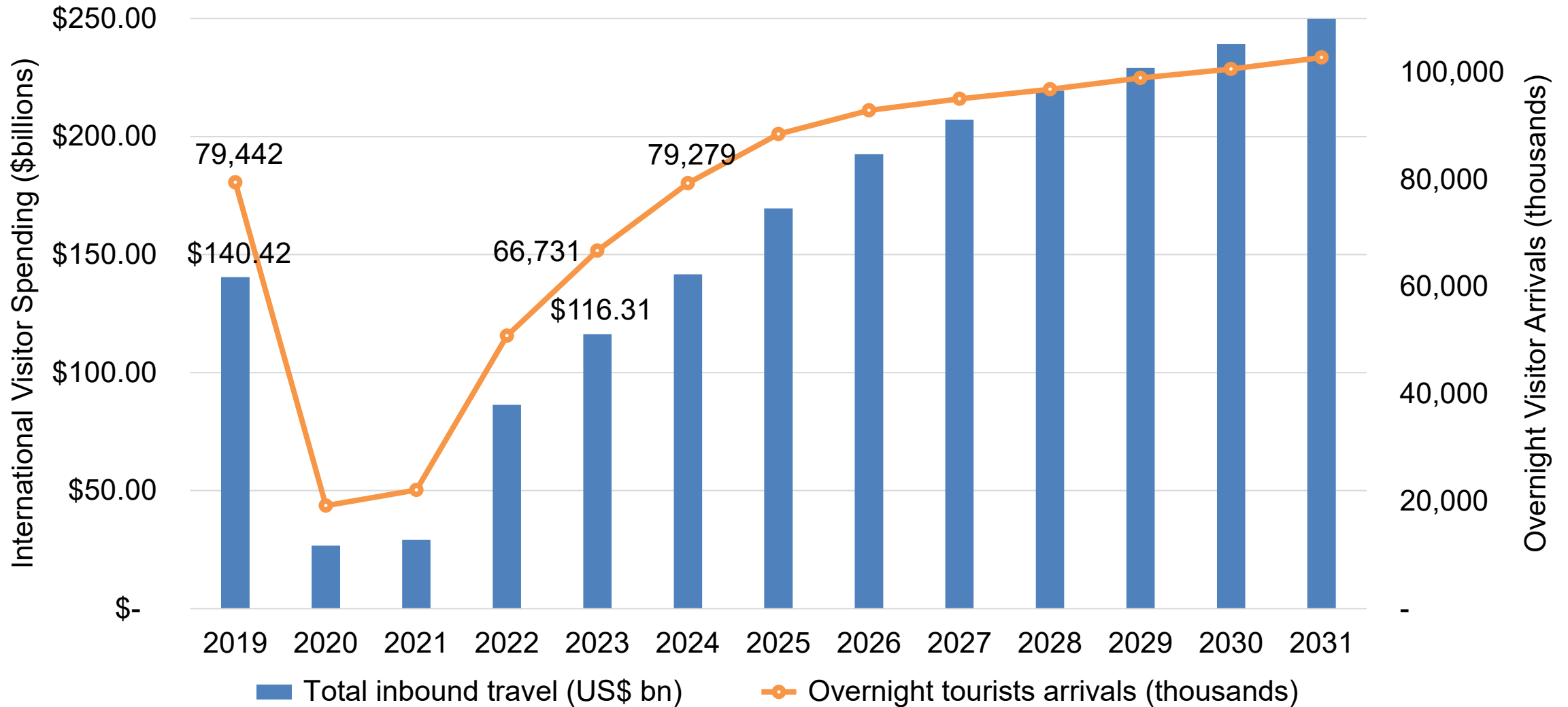
Source: Oxford Economics

# International Arrivals to the U.S.



Source: International Trade Administration, APIS/I-92 Monitor Non-Stop U.S.-International Air Traffic Data

# U.S. International Arrivals and Spending Forecast



Source: Oxford Economics



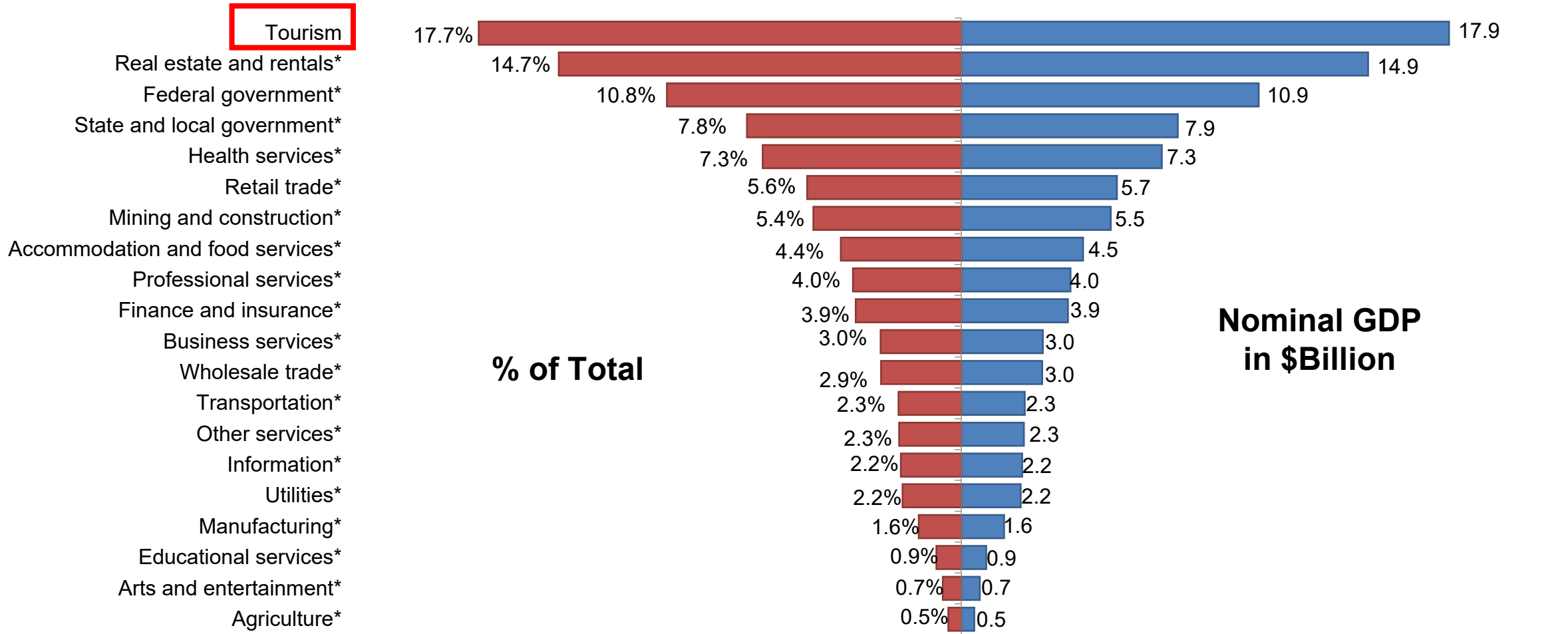
# Rank of Visitor Count by Port of Entry – YTD June 2023

1	New York, NY	2,389,608
2	Miami, FL	1,954,964
3	Los Angeles, CA	1,275,221
4	San Francisco, CA	796,540
5	Newark/Teterboro, NJ	722,699
6	Orlando, FL	601,668
7	Chicago, IL	529,062
8	Washington, DC	421,094
9	Fort Lauderdale, FL	417,985
10	Honolulu, HI	413,806
11	Atlanta, GA	410,080
12	Houston, TX	390,128
13	Boston, MA	368,655
14	Dallas, TX	317,614
15	Agana, GU	213,340

- Honolulu was 4<sup>th</sup> busiest port of entry in 2019
- 2022 Rank: 14<sup>th</sup>
- YTD 2023 Rank: 10<sup>th</sup>

Source: International Trade Administration, ADIS/I-94 Visitor Arrivals Monitor (COR)

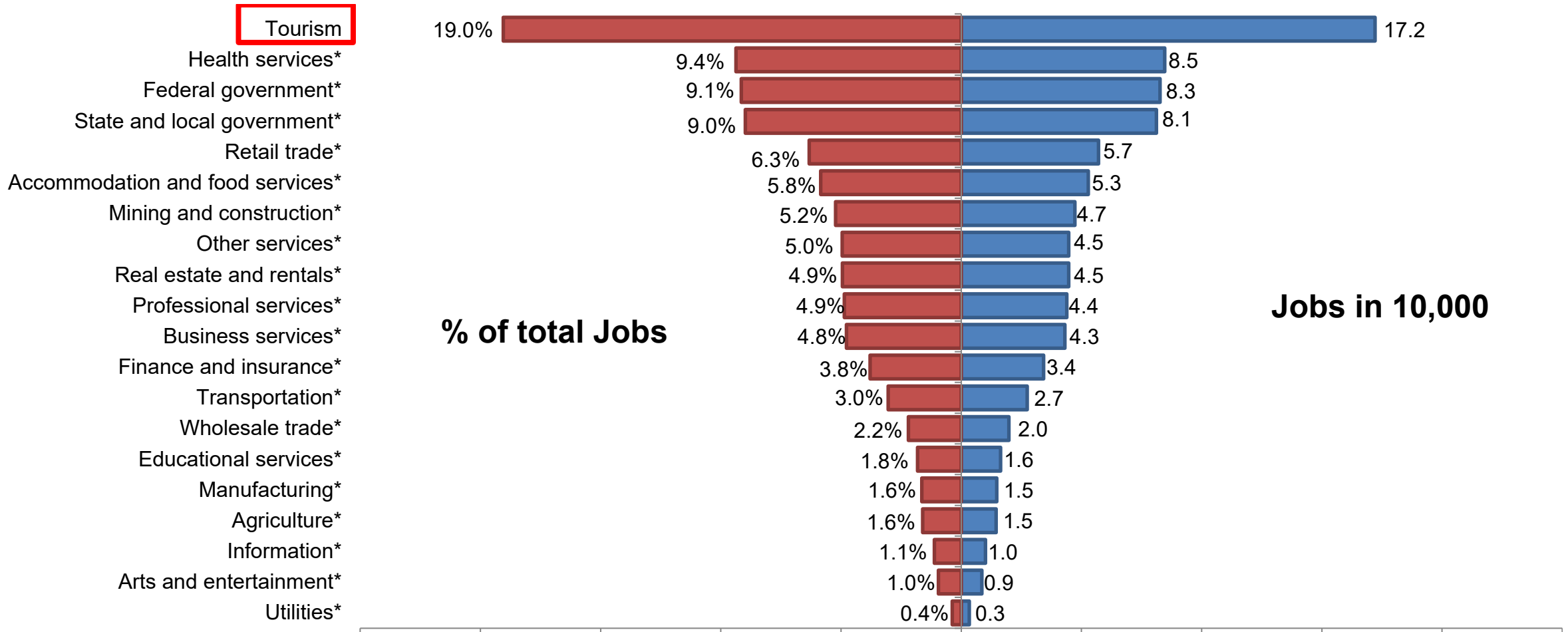
# Hawaii GDP by Industry: 2022 (in current dollars)



\*GDP generated in the other sector by tourism was subtracted from the sector's original GDP measure

Source: DBEDT estimates based on GDP data from BEA released on Sep 29, 2023.

# Hawaii Jobs by Industry: 2022 (Includes payroll jobs and proprietors)

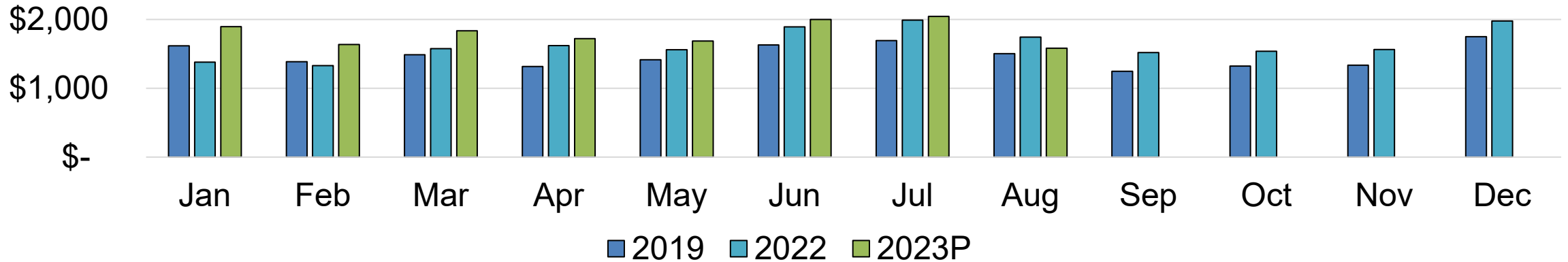


\*Jobs generated in the other sectors by tourism were subtracted from the sector's original job measure.

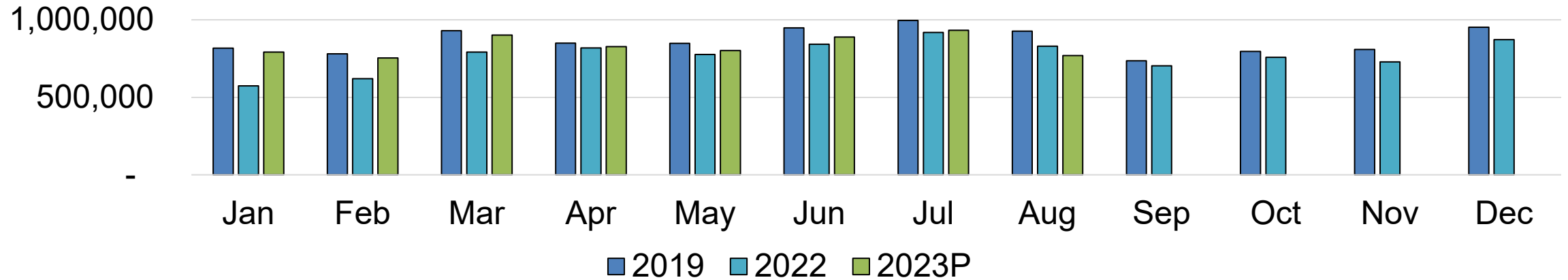
Source: DBEDT estimates based on the total job data from BEA released on Sep 29, 2023

# August 2023 Highlights – Expenditures and Arrivals

## Monthly Visitor Expenditures (\$millions)



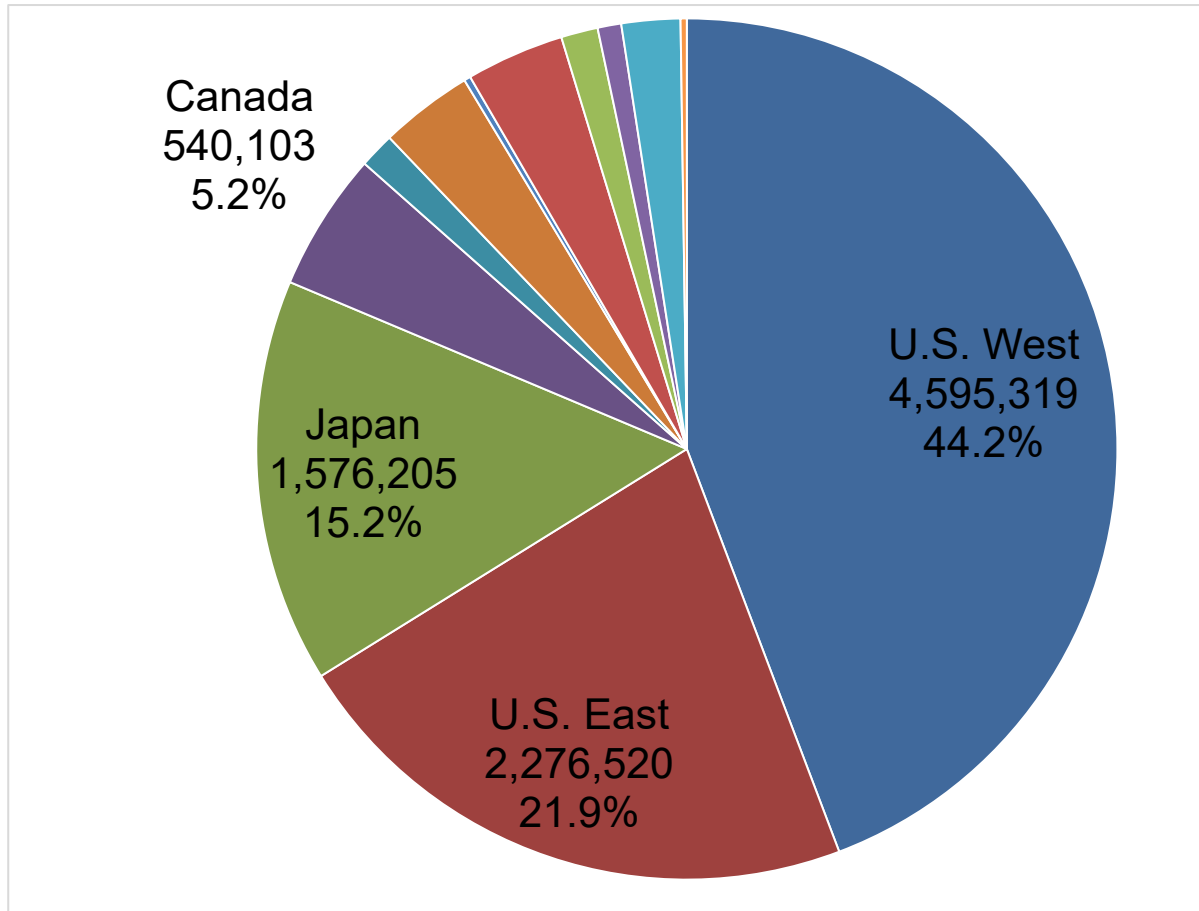
## Monthly Visitor Arrivals



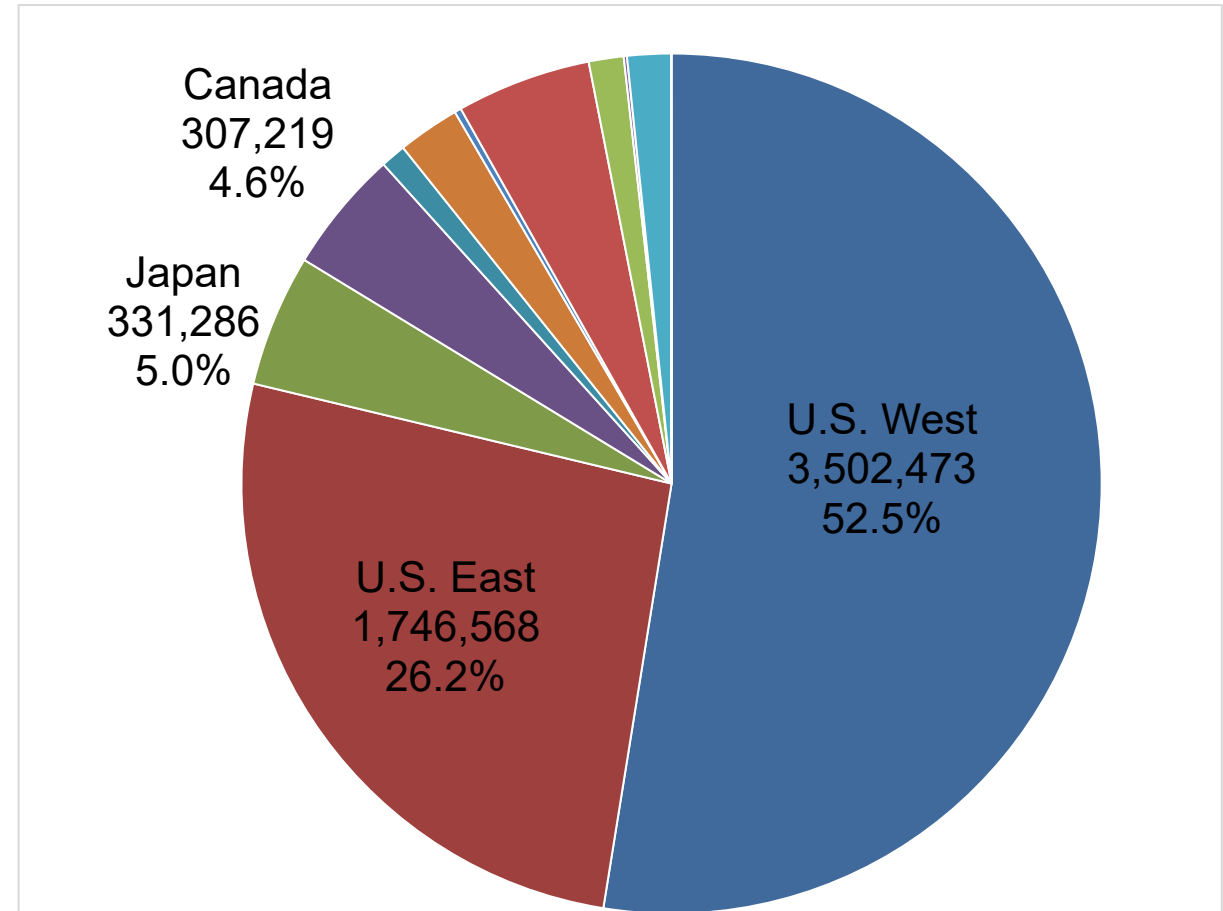
Note: 2023 figures are preliminary.

# Visitor Arrival Mix YTD 2023P vs 2019

2019



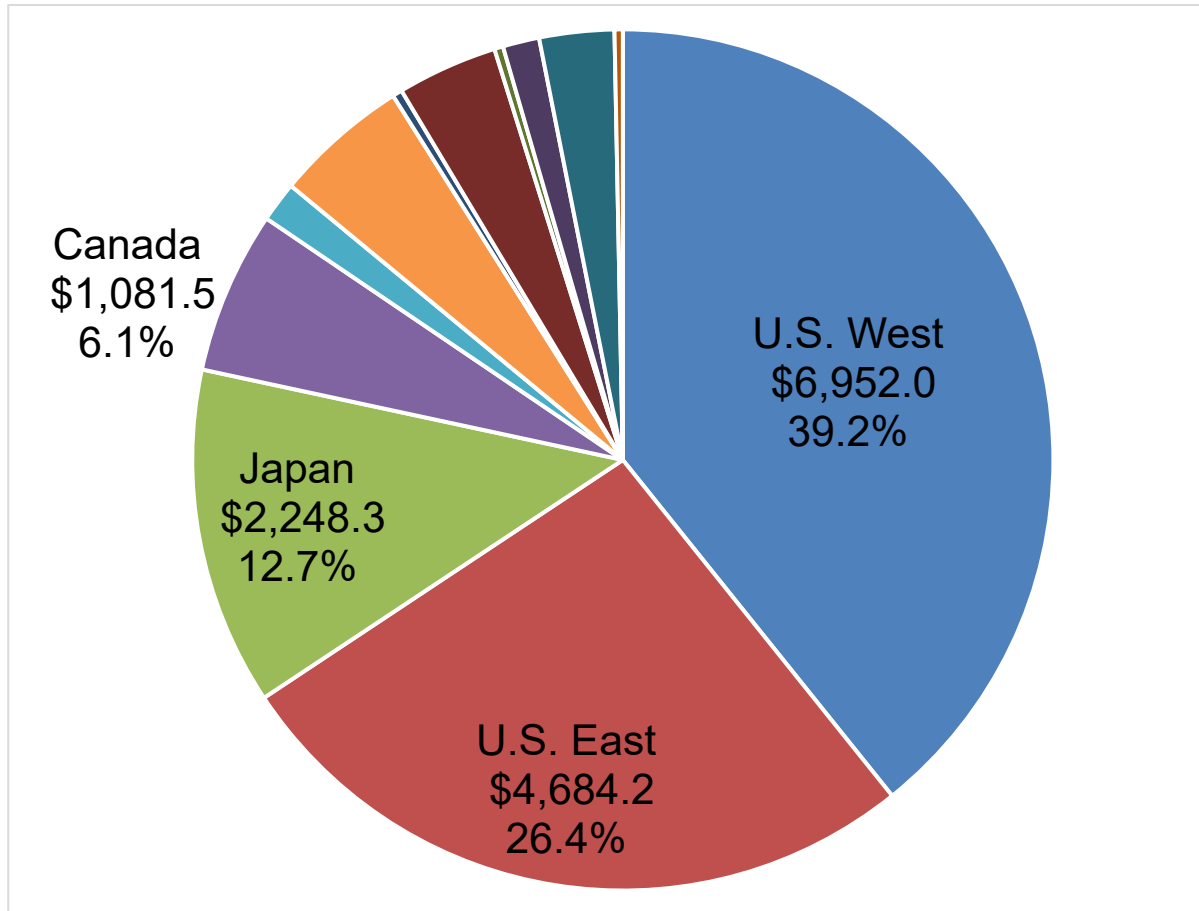
YTD August 2023P



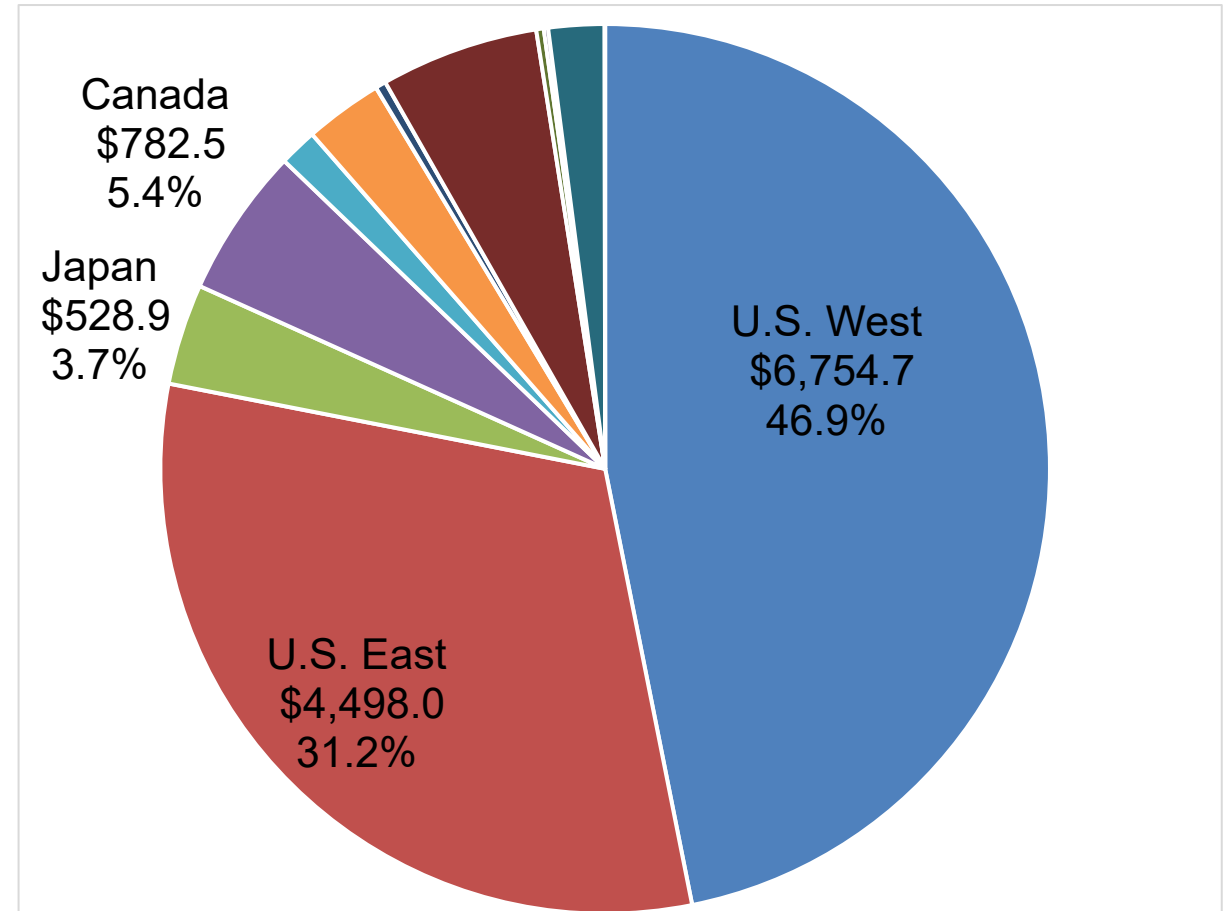
Note: 2023 figures are preliminary.

# Visitor Spending Mix YTD 2023P vs 2019

2019

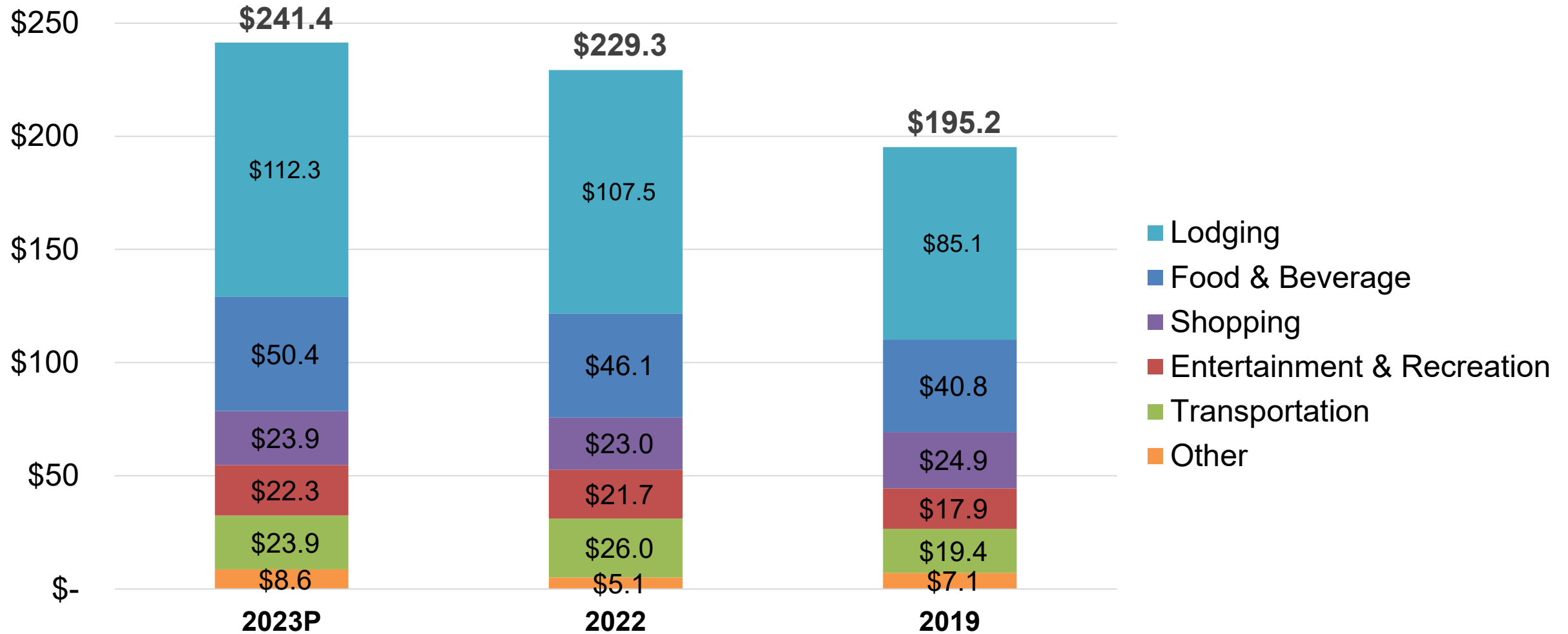


YTD August 2023P



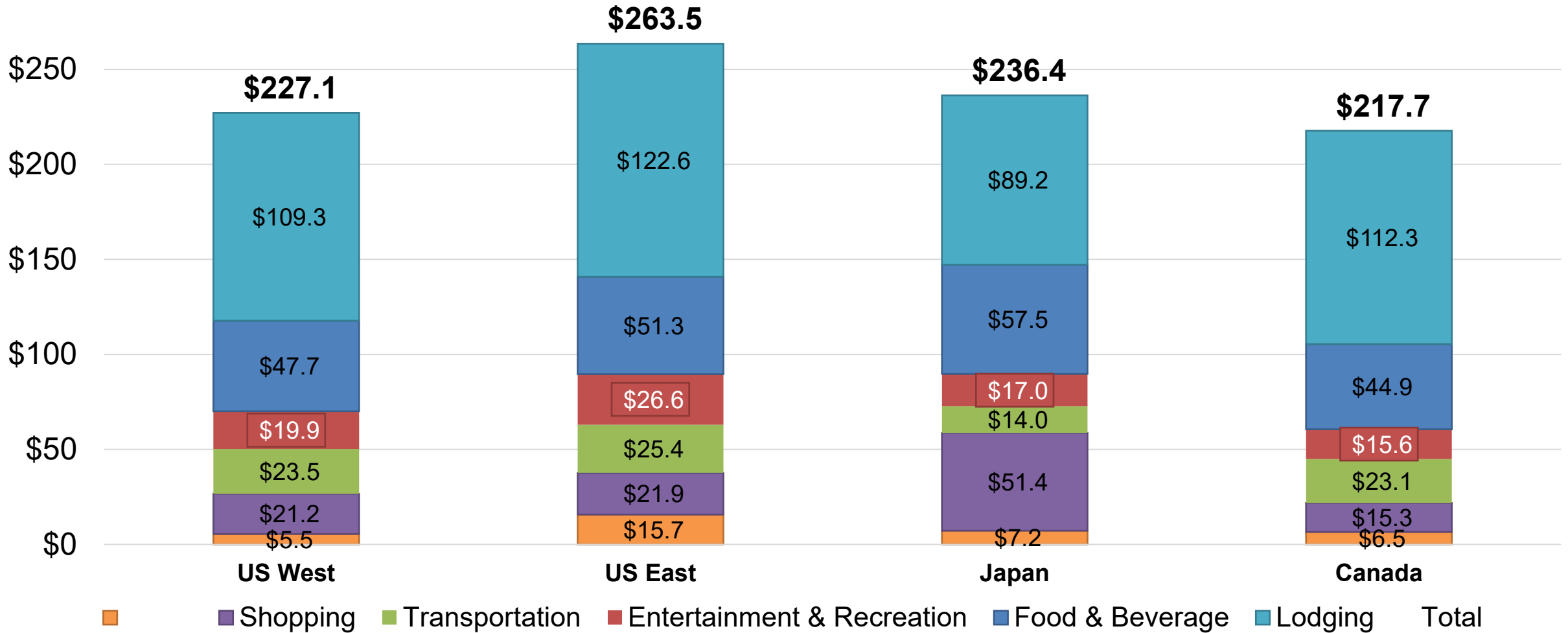
Note: 2023 figures are preliminary.

# Personal Daily Spending by Category – YTD August 2023



Note: 2023 figures are preliminary.

# Personal Daily Spending by Market – YTD August 2023



Note: 2023 figures are preliminary.



# August 2023 Highlights by Market

<b>EXPENDITURES (\$mil.)</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
TOTAL (AIR)	1,582.9	1,744.9	1,502.9
U.S. West	703.0	860.9	579.3
U.S. East	443.6	528.8	379.1
Japan	101.4	61.5	236.9
Canada	56.3	63.9	57.2
All Others	278.6	229.9	250.3

<b>PPPD SPENDING (\$)</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
TOTAL (AIR)	238.0	232.7	191.7
U.S. West	218.9	223.2	167.4
U.S. East	254.3	253.3	205.7
Japan	230.5	240.4	228.4
Canada	225.7	193.4	178.2
All Others	277.1	237.4	212.2

<b>VISITOR ARRIVALS</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
TOTAL (AIR)	766,023	829,772	926,417
U.S. West	392,427	467,082	420,750
U.S. East	183,175	217,258	199,659
Japan	64,155	31,151	160,728
Canada	22,675	28,667	28,672
All Others	103,589	85,614	116,608

<b>AVERAGE DAILY CENSUS</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
TOTAL (AIR)	214,531	241,908	252,916
U.S. West	103,602	124,430	111,617
U.S. East	56,267	67,330	59,441
Japan	14,185	8,255	33,458
Canada	8,052	10,658	10,358
All Others	32,426	31,235	38,042

Note: 2023 figures are preliminary.

# August 2023 Highlights by Island

<b>EXPENDITURES (\$mil.)</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
O'ahu	847.1	813.5	732.0
Maui	246.7	484.0	404.7
Moloka'i	3.0	2.3	1.7
Lāna'i	12.1	13.5	12.4
Kaua'i	229.3	195.5	159.0
Hawai'i Island	244.6	236.1	193.1

<b>PPPD SPENDING (\$)</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
O'ahu	232.8	237.7	187.1
Maui	277.6	238.4	202.2
Moloka'i	151.8	112.7	105.3
Lāna'i	618.1	665.0	512.8
Kaua'i	242.3	219.4	190.9
Hawai'i Island	215.1	211.6	183.2

<b>VISITOR ARRIVALS</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
O'ahu	507,702	457,271	575,070
Maui	112,259	266,176	273,638
Moloka'i	2,981	4,167	4,860
Lāna'i	7,248	5,615	7,739
Kaua'i	131,628	120,808	120,030
Hawai'i Island	152,951	146,973	157,544

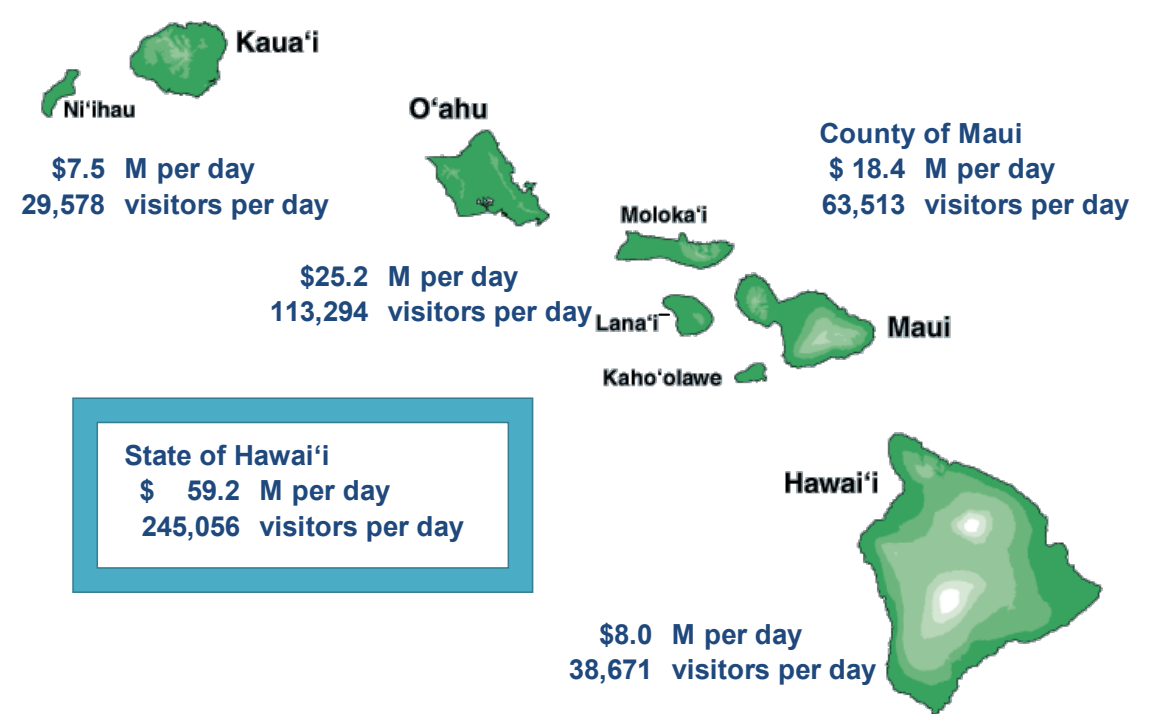
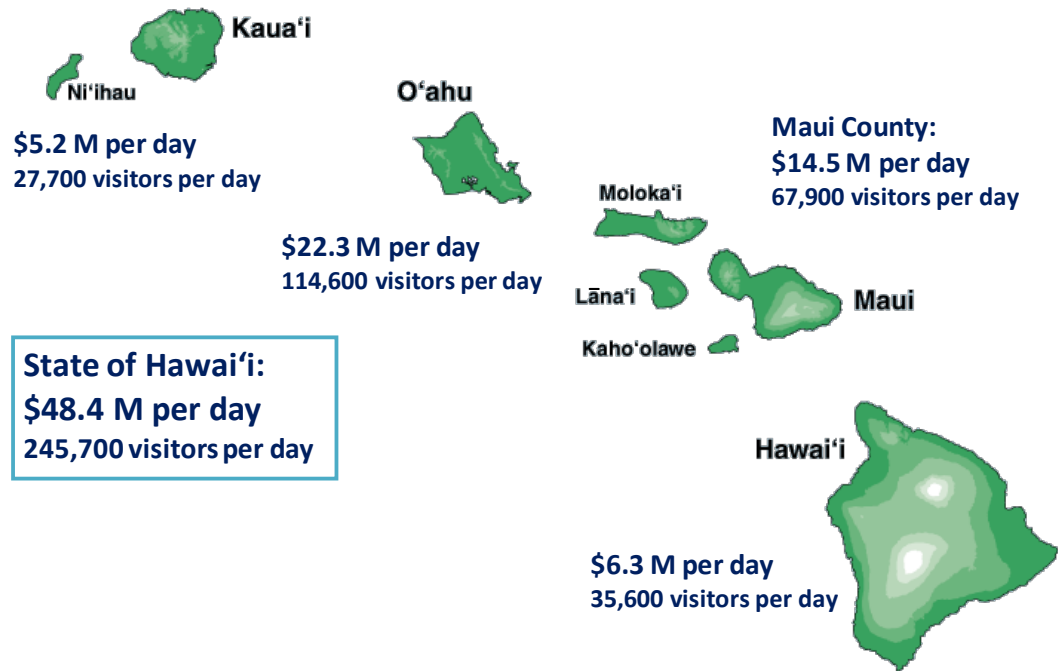
<b>AVERAGE DAILY CENSUS</b>	<b>2023P</b>	<b>2022</b>	<b>2019</b>
O'ahu	117,364	110,394	126,206
Maui	28,671	65,473	64,553
Moloka'i	645	657	523
Lāna'i	633	656	779
Kaua'i	30,526	28,743	26,865
Hawai'i Island	36,693	35,985	33,989

Note: 2023 figures are preliminary.

# Tourism Impacts by County – YTD 2023P vs. 2019

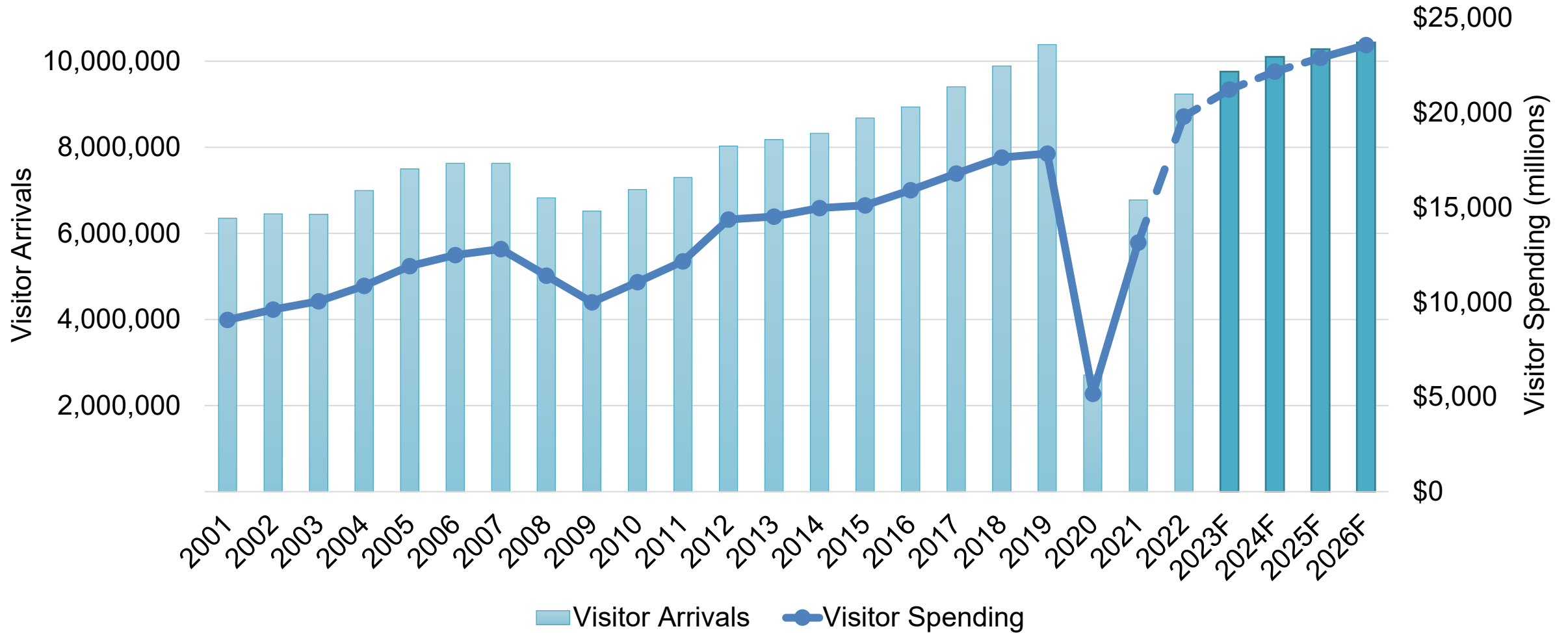
**2019**

**YTD August 2023P**



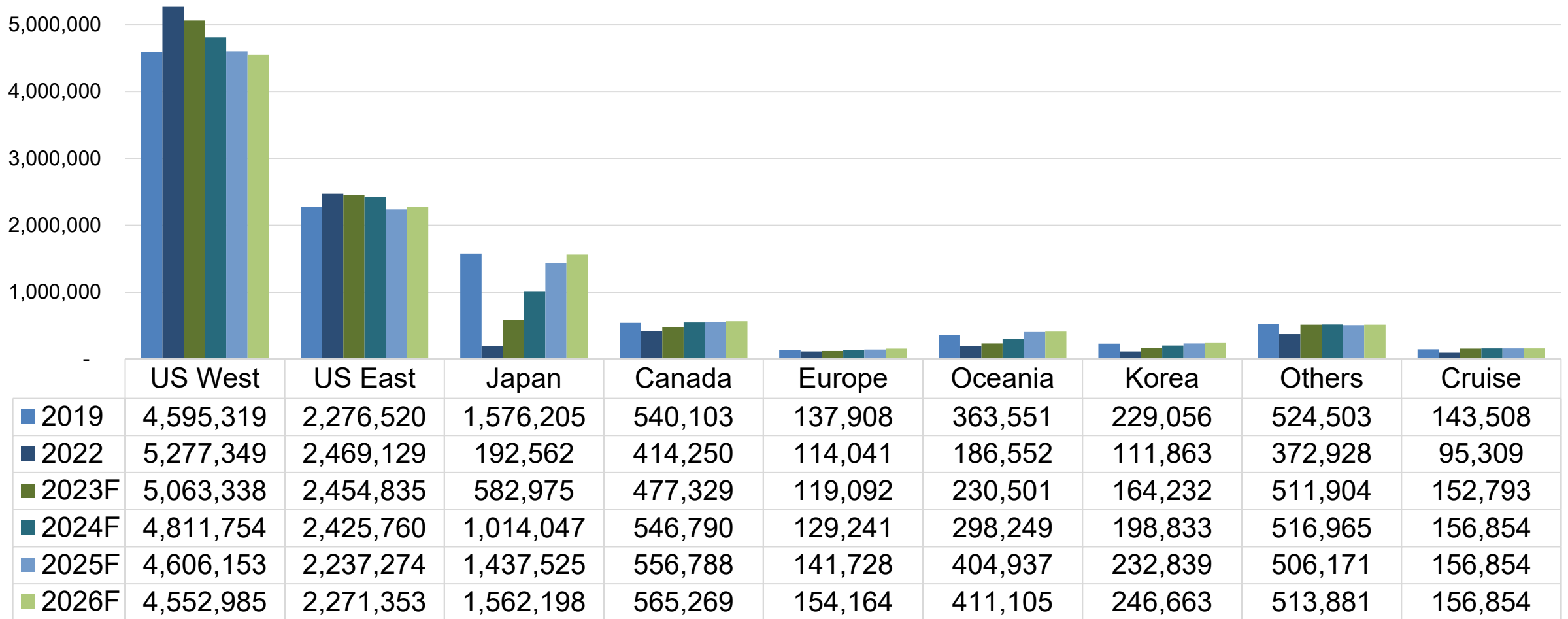
Note: 2023 figures are preliminary.

# DBEDT Tourism Forecast



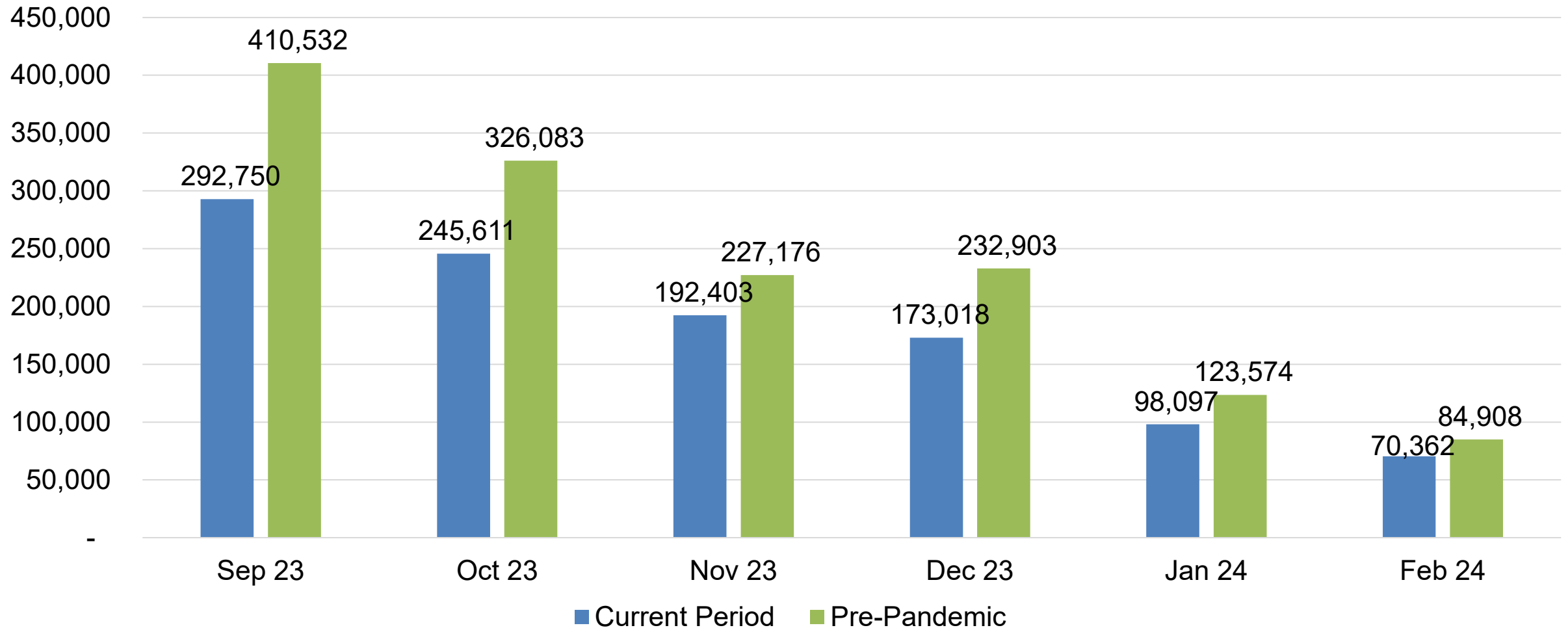
Source: DBEDT, Q3 2023 Forecast

# DBEDT Tourism Forecast



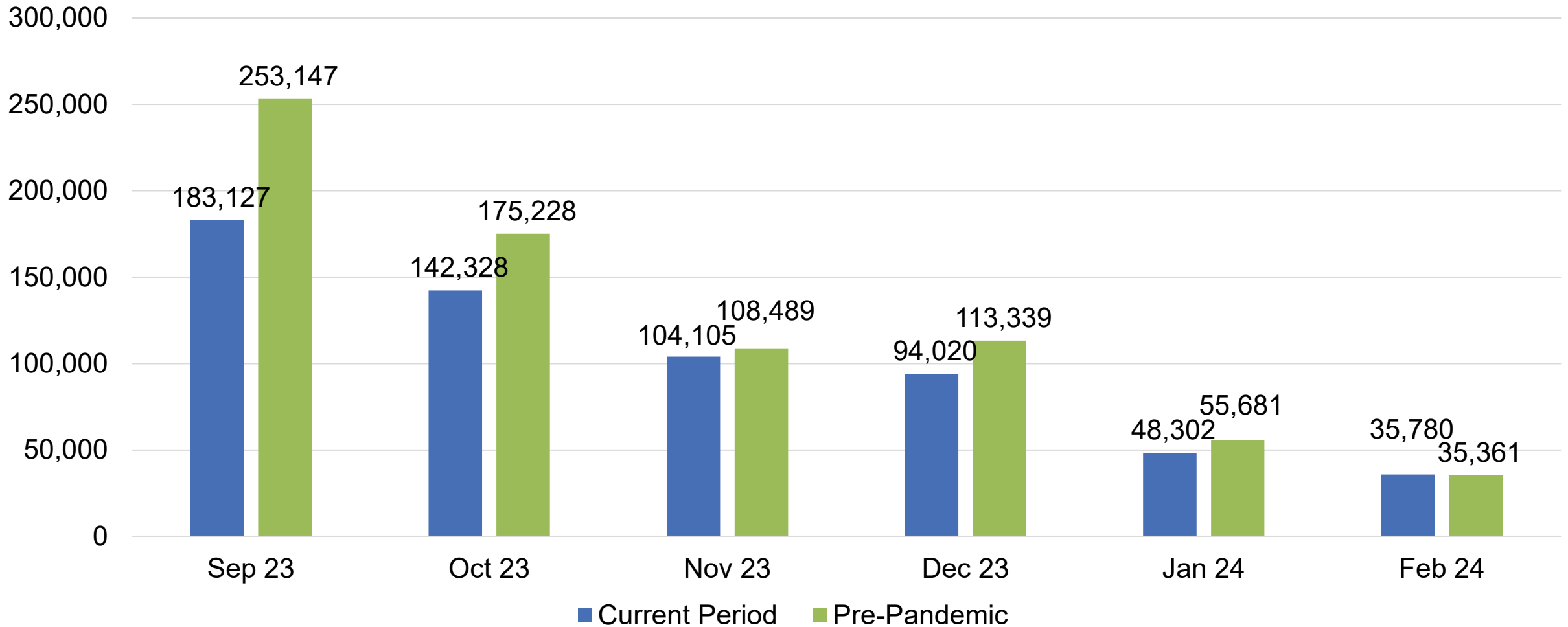
Source: DBEDT, Q3 2023 Forecast

# Six Month Outlook: All Origins



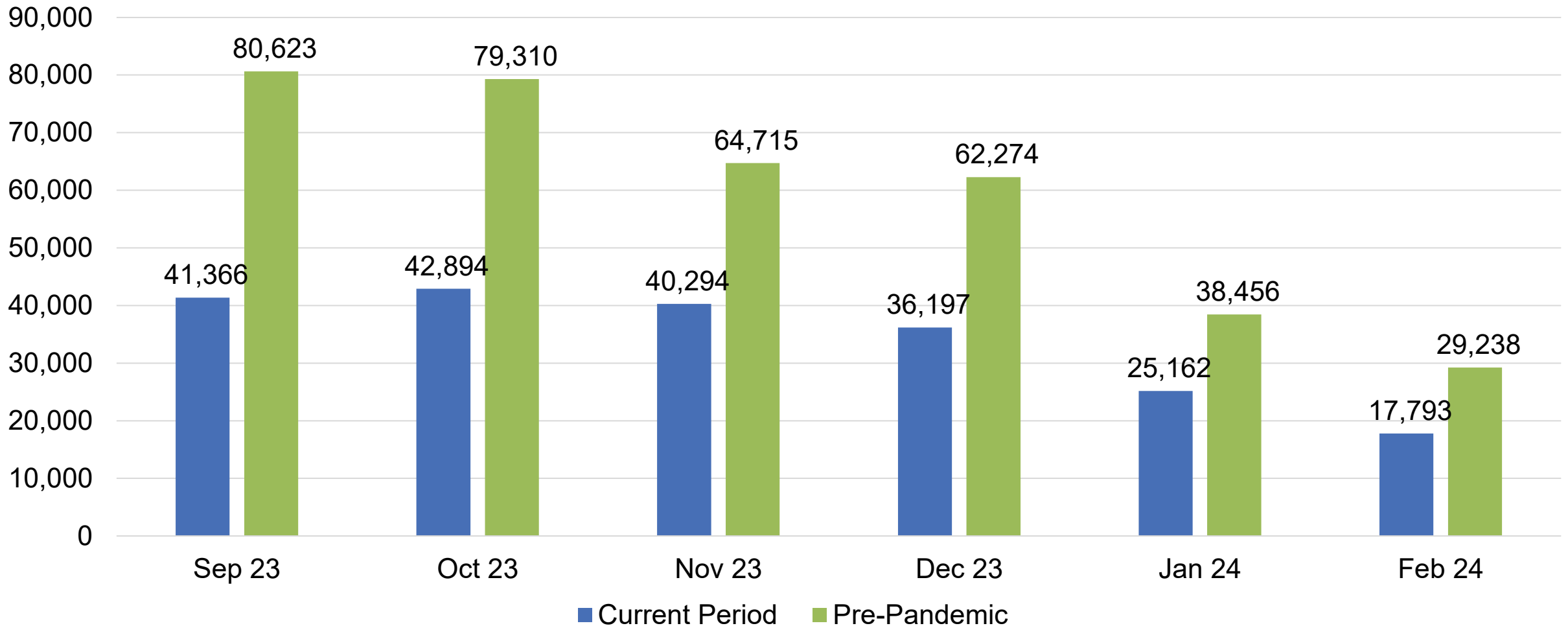
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: All Markets to O'ahu



Source: ARC/ForwardKeys Destination Gateway

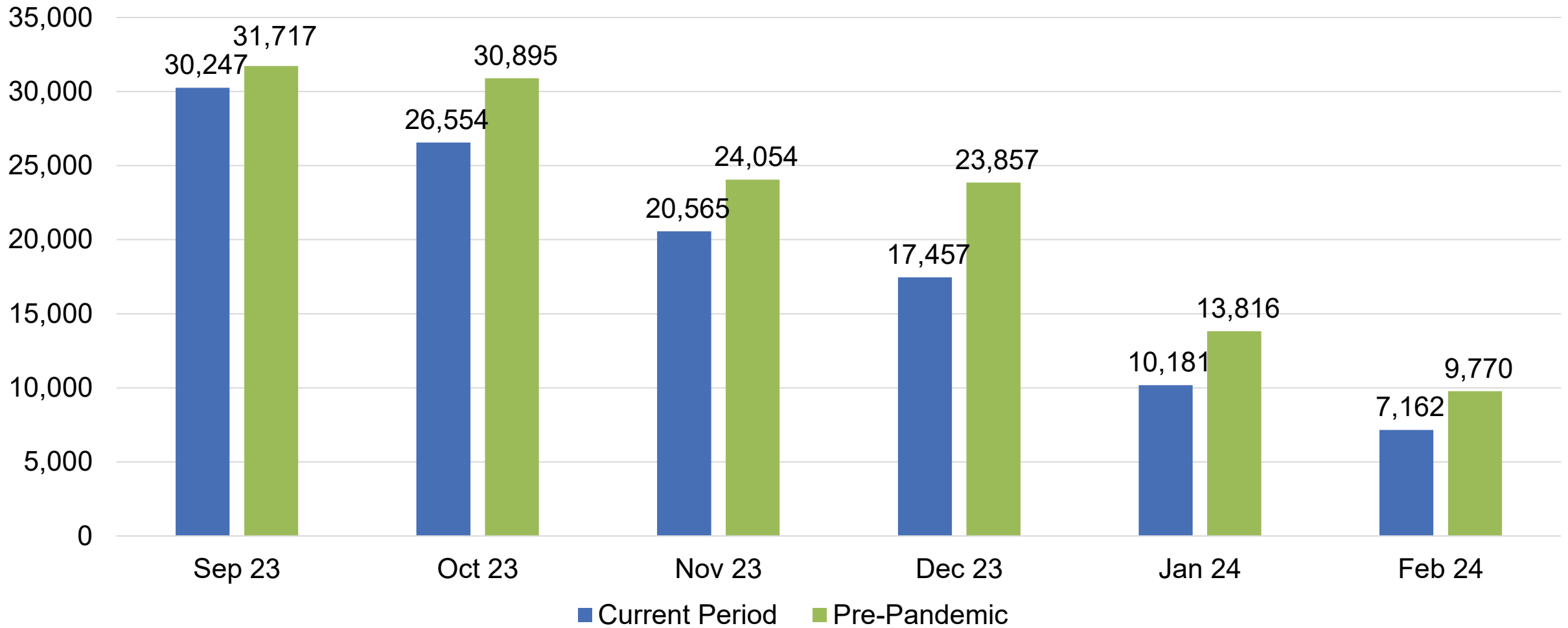
# Six Month Outlook: All Markets to Maui



Source: ARC/ForwardKeys Destination Gateway

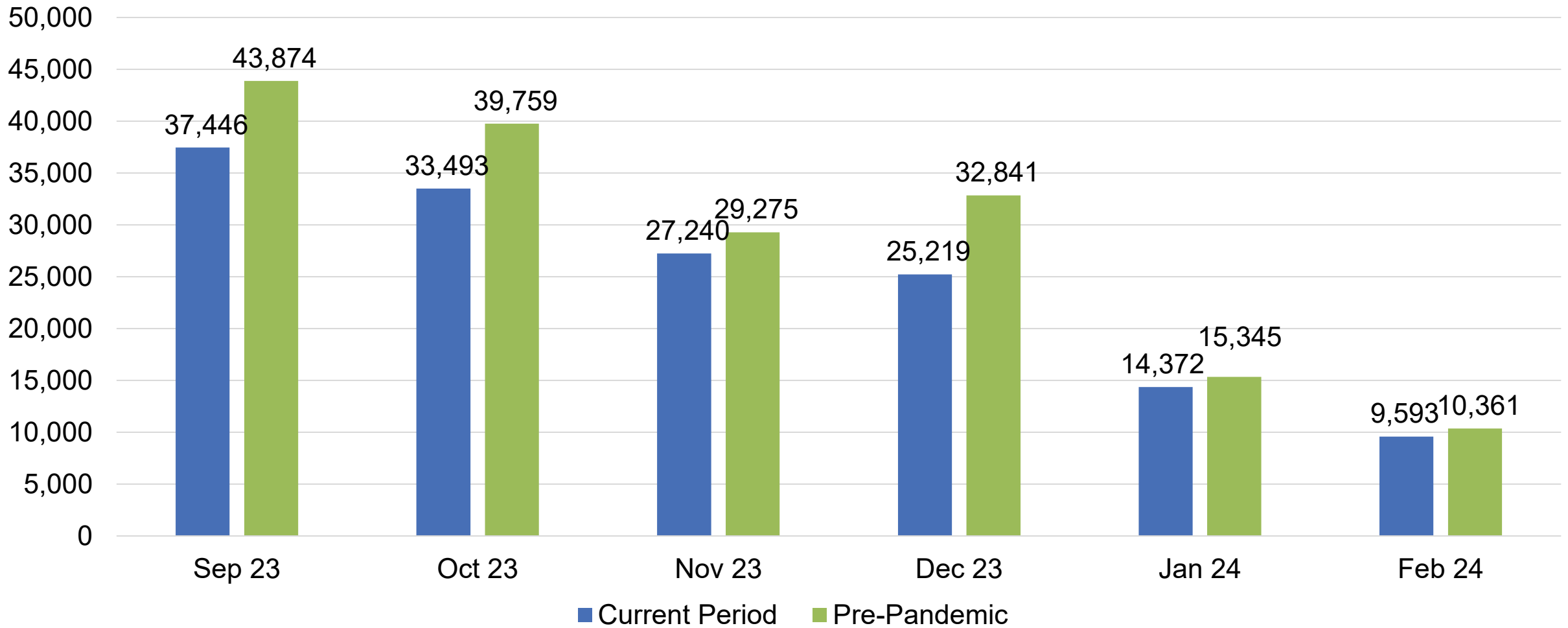


# Six Month Outlook: All Markets to Kaua'i



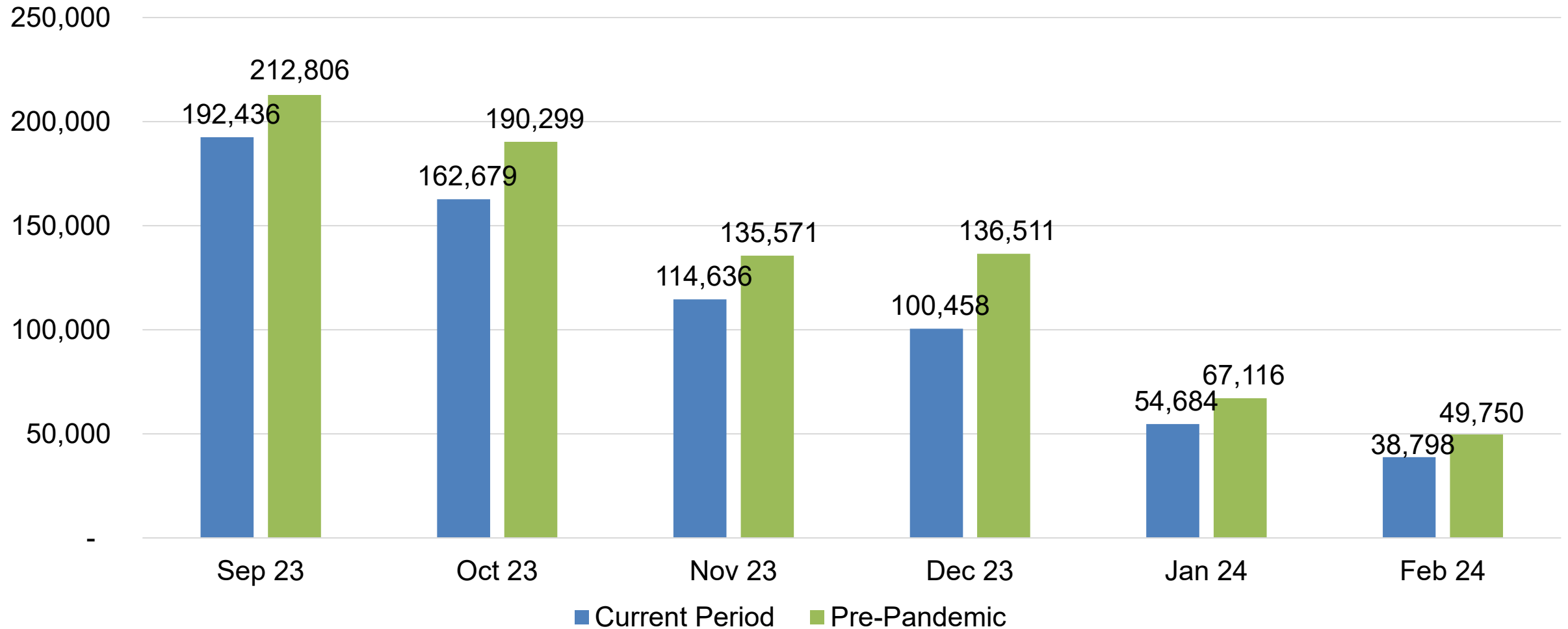
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: All Markets to Hawai'i Island



Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway

# MMGY Portrait of American Travelers

## States Interested in Visiting During the Next Two Years

Rank	Destination	% Interested
1	Hawaii	63%
2	Florida	61%
3	California	56%
4	Colorado	54% ▲
5	Alaska	53% ▲
6	New York	50%
7	Nevada	46%
7	Texas	46%
9	Arizona	44% ▲
10	North Carolina	41%
10	South Carolina	41% ▲
12	Tennessee	40%
13	Georgia	39%
14	Washington	37%
14	Maine	37%
16	Montana	34%
16	Louisiana	34%
16	Massachusetts	34%
16	Pennsylvania	34%
20	New Mexico	33%

Rank	Destination	% Interested
21	Oregon	32%
21	Virginia	32%
23	Wyoming	30%
25	Vermont	29%
25	Utah	29% ▼
26	Maryland	28%
26	Michigan	28%
26	New Jersey	28%
26	New Hampshire	28%
30	Rhode Island	27% ▼
30	Connecticut	27%
32	West Virginia	25%
32	Wisconsin	25% ▼
34	South Dakota	24%
34	Illinois	24%
34	Kentucky	24%
34	Missouri	24%
38	Minnesota	23%
38	North Dakota	23%
38	Idaho	23%

Rank	Destination	% Interested
38	Alabama	23% ▼
42	Delaware	22%
42	Arkansas	22%
42	Ohio	22% ▼
45	Mississippi	21% ▼
45	Oklahoma	21%
47	Nebraska	19% ▼
48	Indiana	18% ▼
49	Kansas	17% ▼
49	Iowa	17%

- ▲ Displayed a statistically significant increase compared to Q3 2022
- ▼ Displayed a statistically significant decrease compared to Q3 2022

Base: Active leisure travelers (n=3,294)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

# MMGY Portrait of American Travelers

Rank	Destination	% Interested
1	Las Vegas, NV	55%
2	Island of Hawai'i	54% ▼
3	Honolulu, HI	52% ▼
3	Florida Keys/Key West, FL	52%
5	Orlando, FL	50%
6	Maui, HI	49% ▼
7	Kaua'i, HI	48% ▼
7	New York City, NY	48%
9	San Diego, CA	45%
9	Niagara Falls, NY	45%
11	New Orleans, LA	44%
11	Miami, FL	44%
11	Nashville, TN	44%
11	Tampa/St. Petersburg/ Clearwater, FL*	44%
15	Lanai, HI*	43%
15	Los Angeles, CA	43%
17	Denver, CO	42%
18	Palm Beach, FL	42%
18	Washington, D.C.	42%
20	Myrtle Beach, SC	41%
20	San Francisco, CA	41% ▼
22	Fort Lauderdale, FL	40%
22	Boston, MA	40%

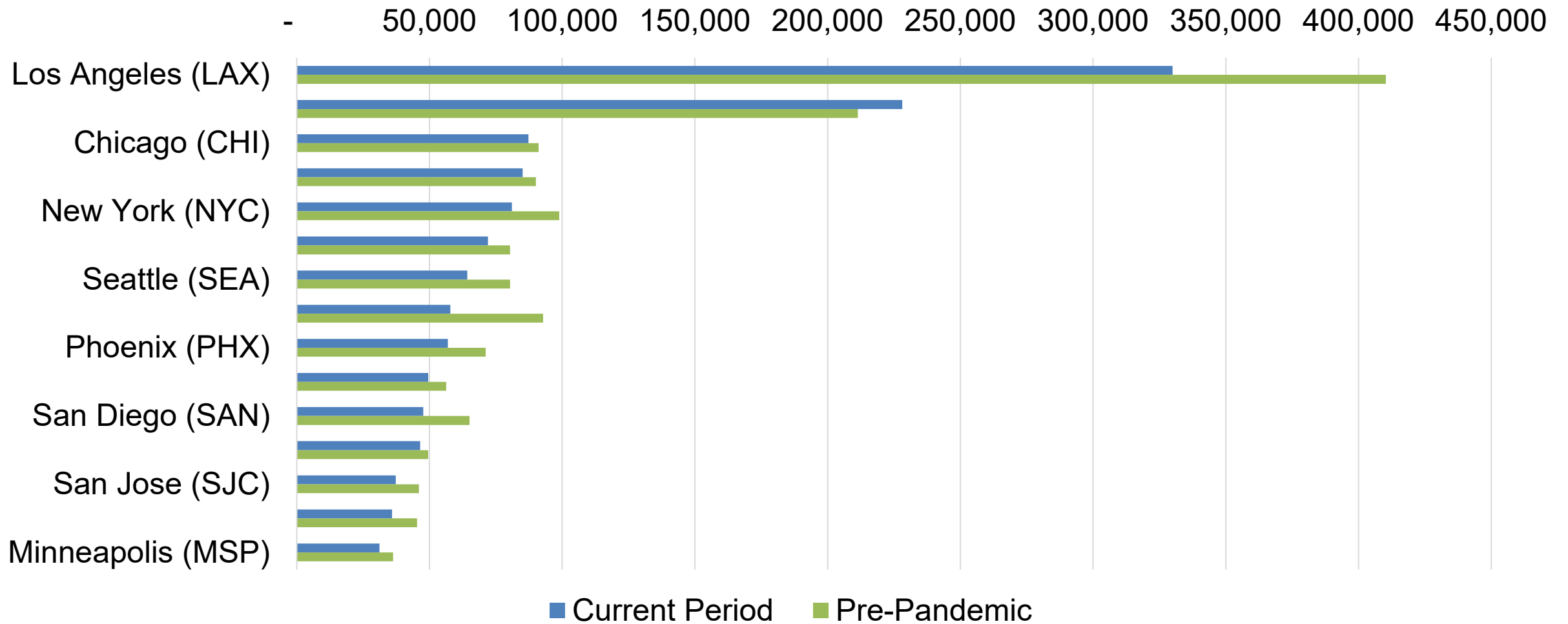
Rank	Destination	% Interested
24	Fort Myers/Sanibel/Captiva, FL	39%
24	Palm Springs, CA	39%
24	Napa Valley, CA	39%
24	Hilton Head Island, SC	39%
24	Charleston, SC	39%
29	Daytona Beach, FL	38%
29	Panama City Beach, FL	38%
29	St. Augustine, FL	38%
32	Seattle, WA	37%
32	Phoenix/Scottsdale, AZ	37%
34	Aspen, CO*	36%
34	Sedona, AZ*	36%
34	San Antonio, TX	36%
37	Austin, TX	35%
37	Dallas, TX	35%
37	Outer Banks, NC	35%
37	Charlotte, NC	35%
37	Gatlinburg/Pigeon Forge, TN	35%
42	Virginia Beach, VA	34%
42	Houston, TX	34%
44	Atlanta, GA	33%
45	Chicago, IL	32% ▼
45	Sonoma County, CA	32% ▼

Rank	Destination	% Interested
45	Portland, OR	32%
45	Vail, CO	32% ▲
49	Anaheim, CA	31% ▼
49	Santa Fe, NM*	31%
49	Philadelphia, PA	31%
49	Jackson Hole, WY*	31%
53	San Jose, CA*	30%
53	Asheville, NC	30% ▼
55	Salt Lake City, UT	29%
55	Greenville, SC*	29%
55	Raleigh/Durham, NC	29%
58	Winston-Salem, NC	27%
59	Wilmington, NC	26%
59	Corpus Christi, TX	26%
59	Branson, MO	26%
59	St. Louis, MO	26%
63	Park City, UT*	25%
64	Minneapolis, MN	23%
65	Shreveport, LA*	22%
65	Kansas City, MO	22% ▼
65	Ann Arbor, MI	22%
68	Detroit, MI	21% ▼
68	Cleveland, OH	21% ▼

Base: Active leisure travelers (n=3,294)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

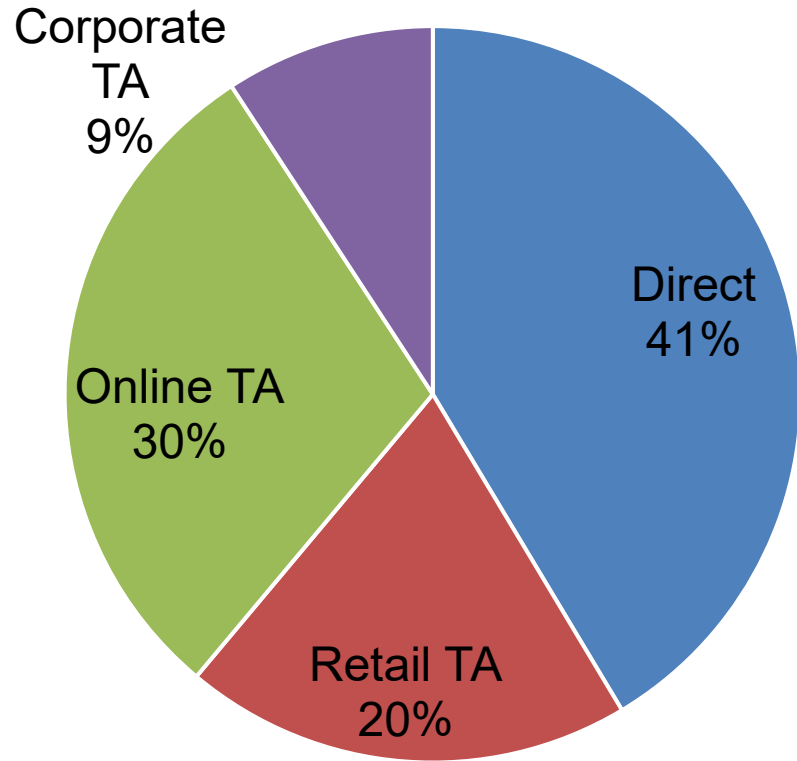
# Trip Origins: United States



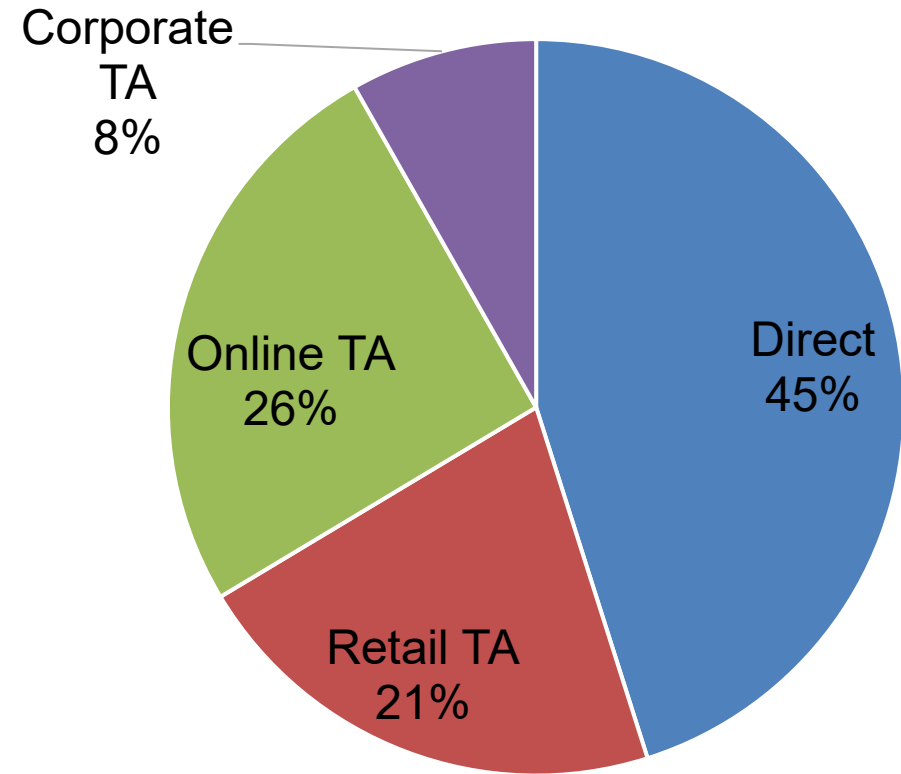
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: United States

## Pre-Pandemic



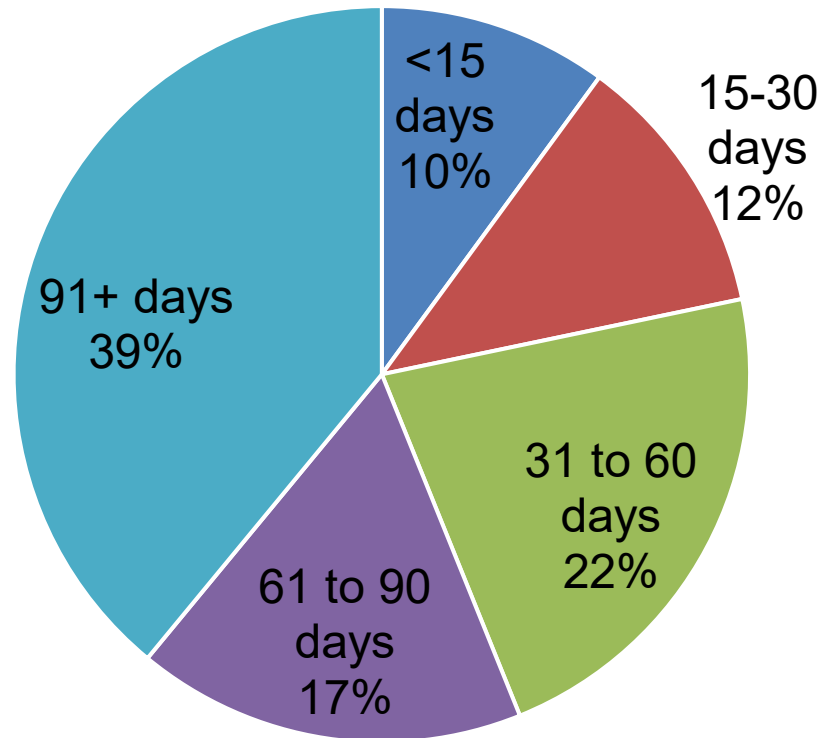
## Current Period



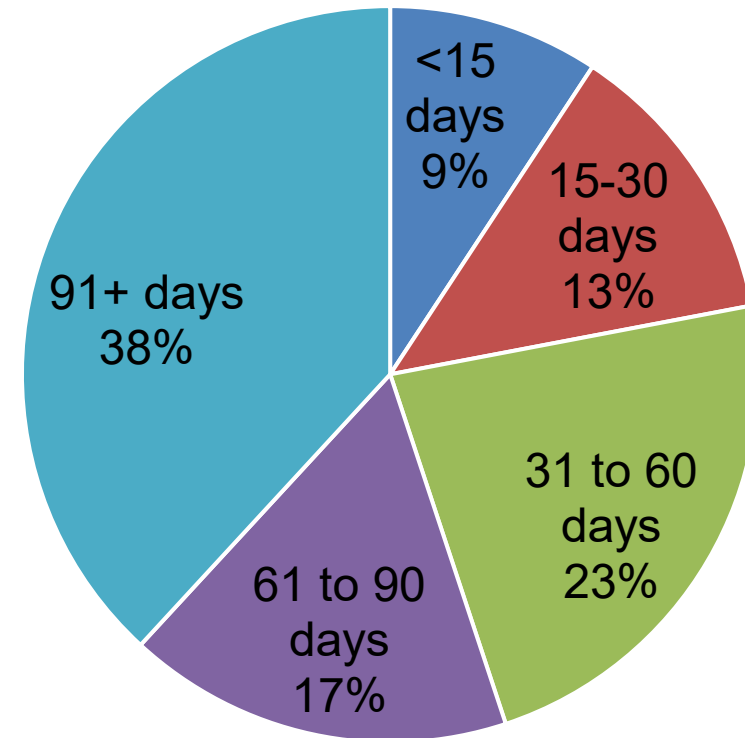
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: United States

## Pre-Pandemic



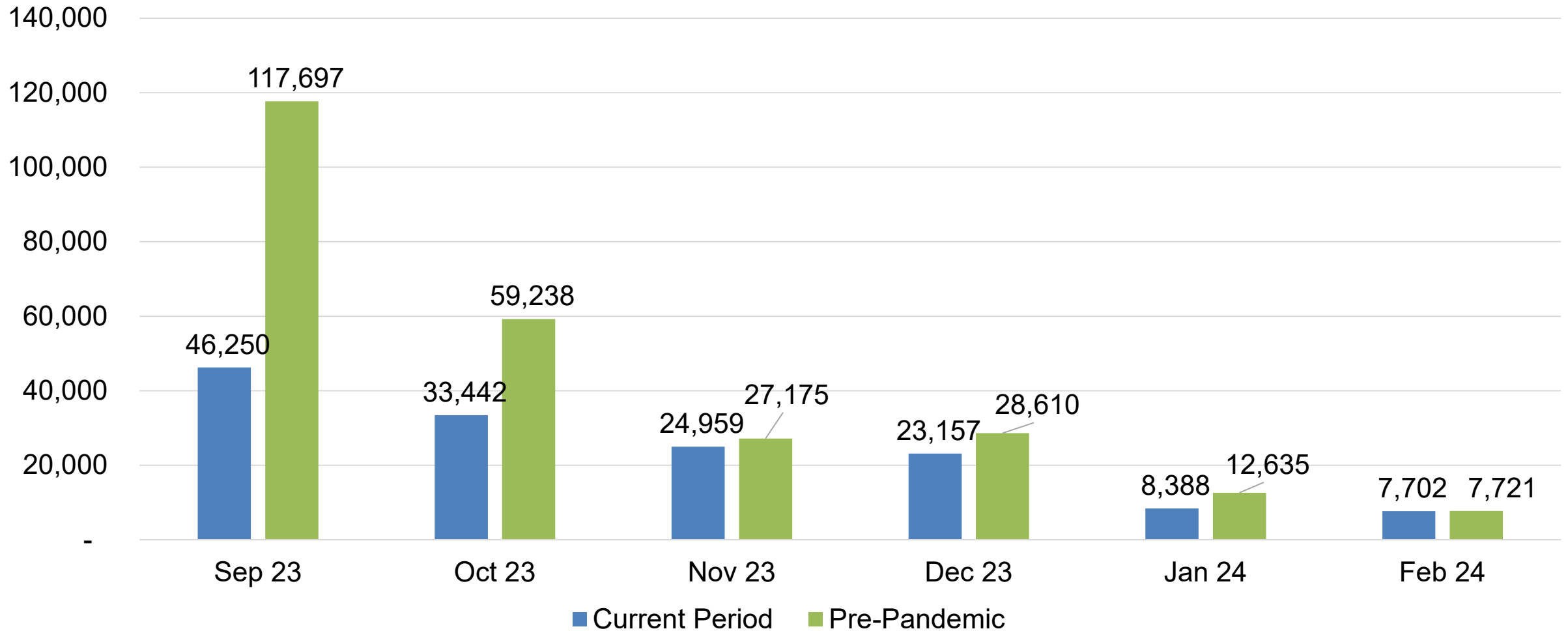
## Current Period



Source: ARC/ForwardKeys Destination Gateway



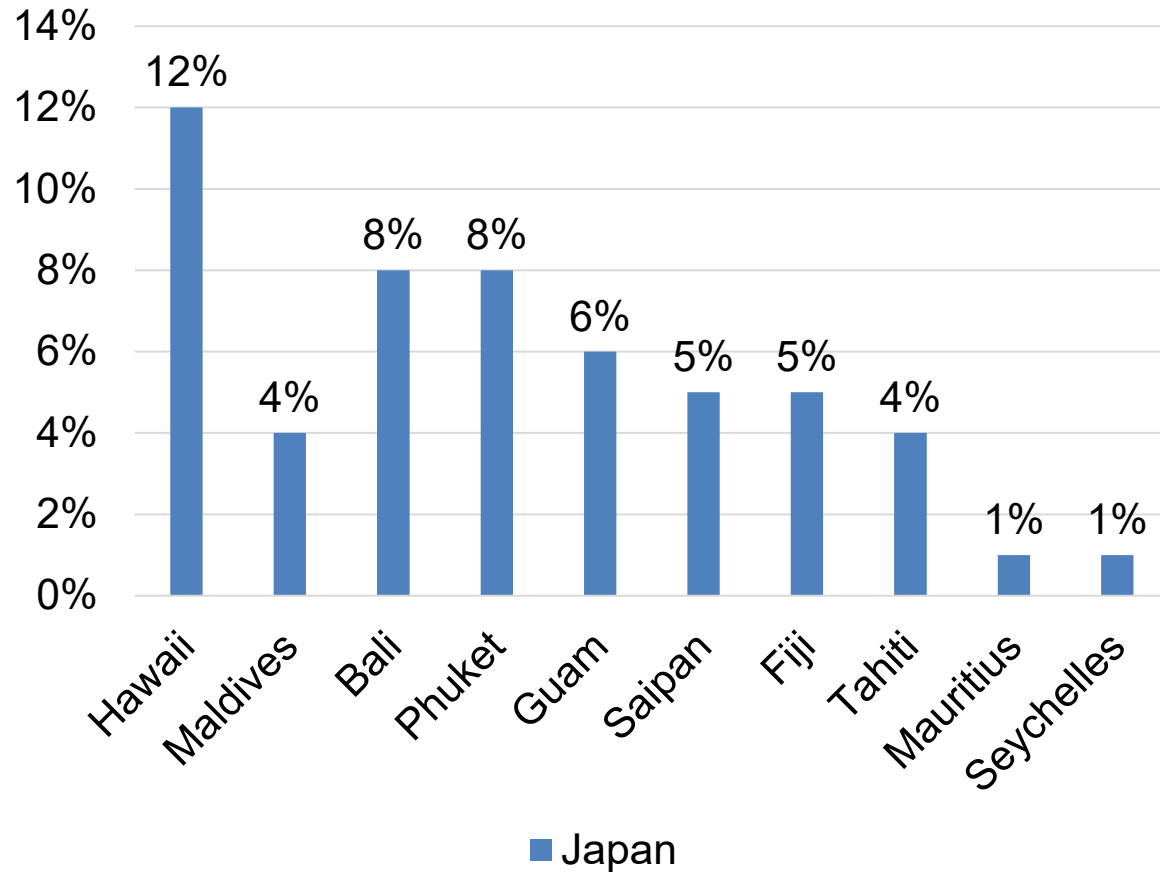
# Six Month Outlook: Japan



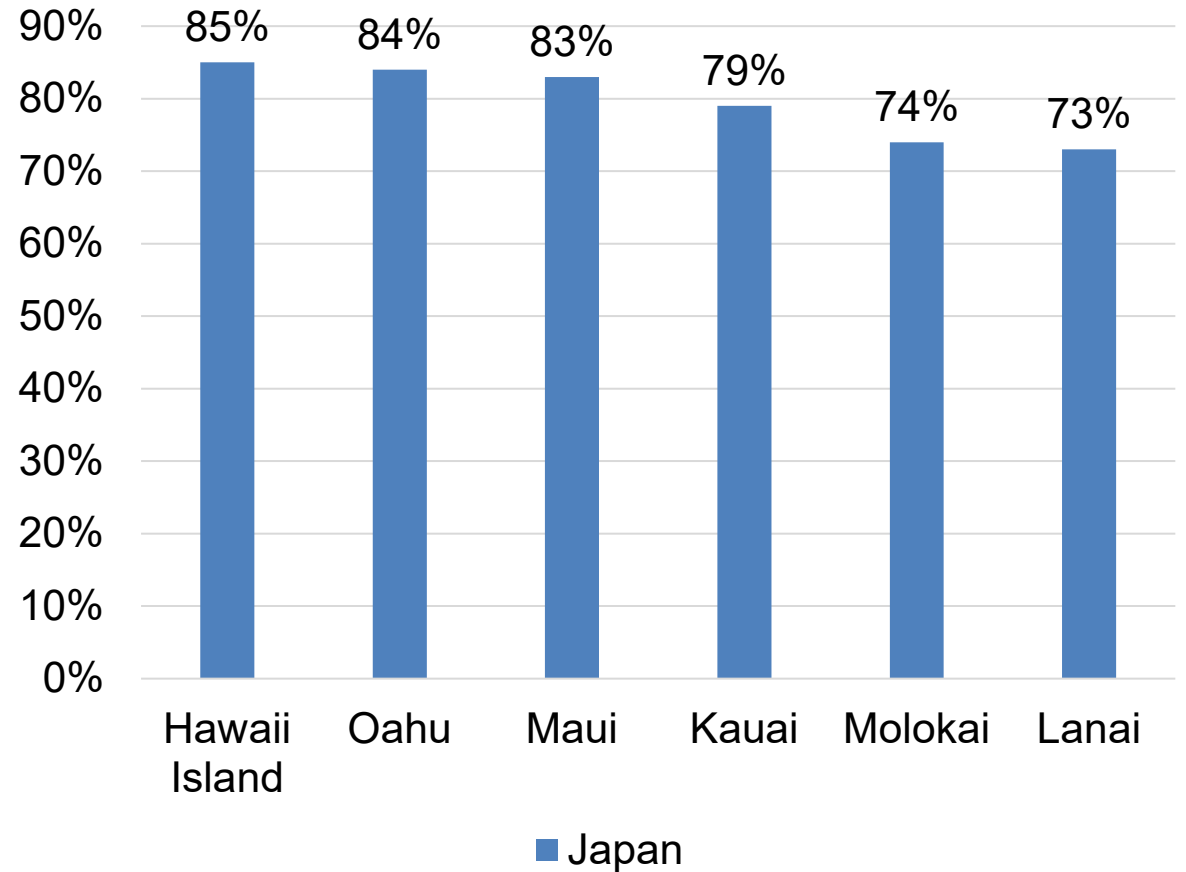
Source: ARC/ForwardKeys Destination Gateway

# MMGY Portrait of Asian International Travelers

## Interest in Visiting Island Destinations



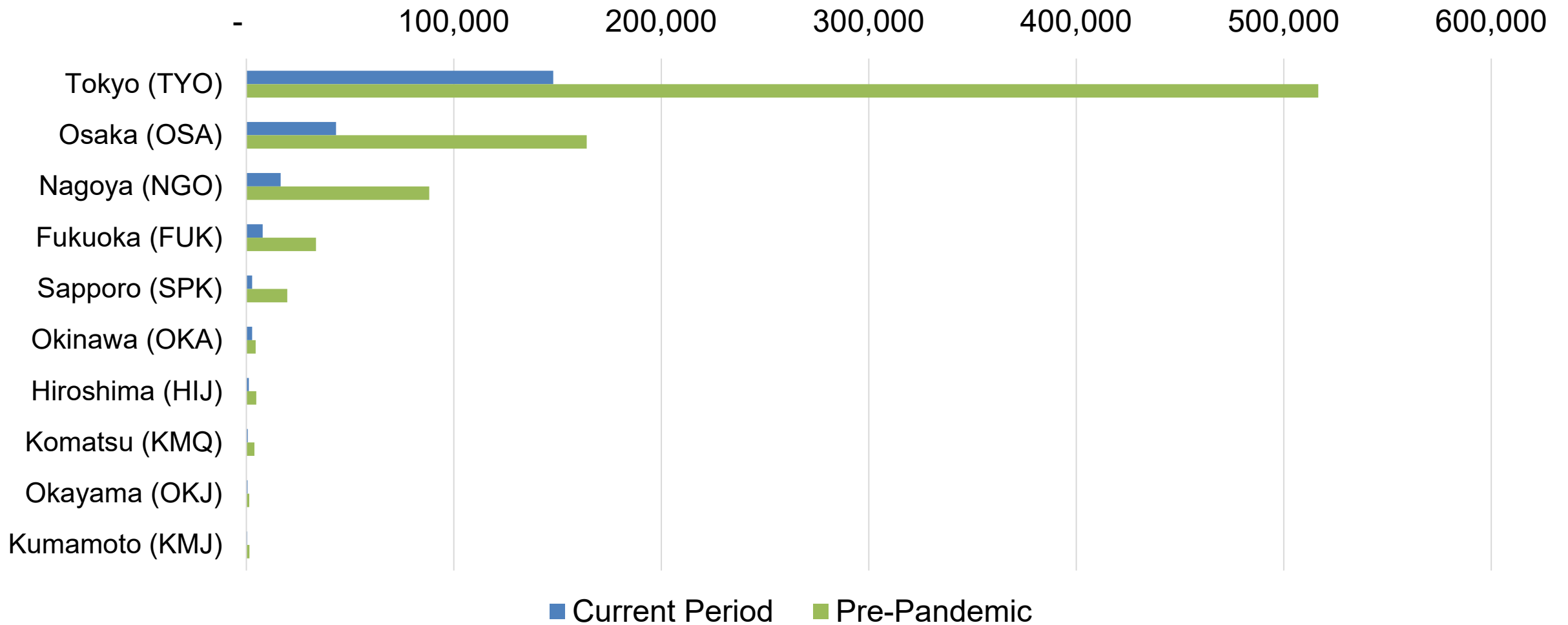
## Interest in Visiting Hawaiian Islands



Base: Asian International travelers (China: n=755; India: n=428; Japan: n=428; South Korea: n=429)

Source: MMGY Travel Intelligence's 2023 Portrait of Asian International travelers™

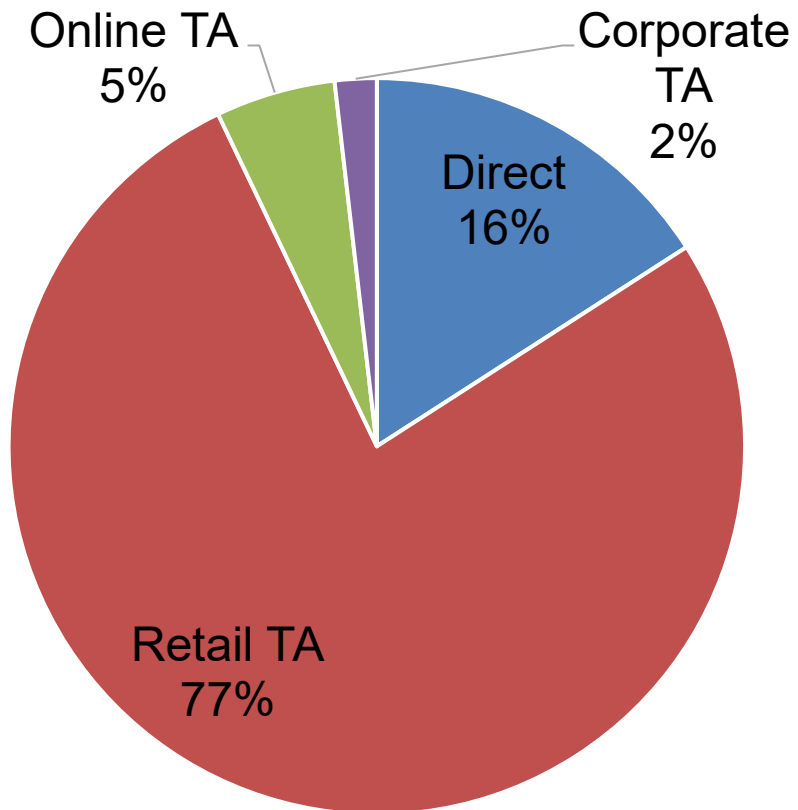
# Trip Origins: Japan



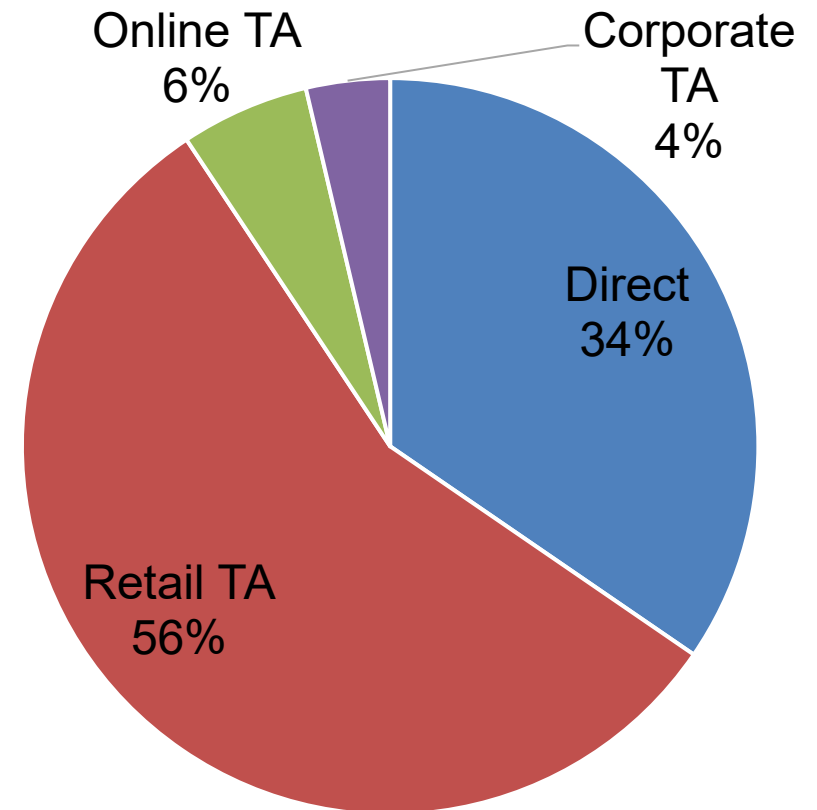
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Japan

## Pre-Pandemic



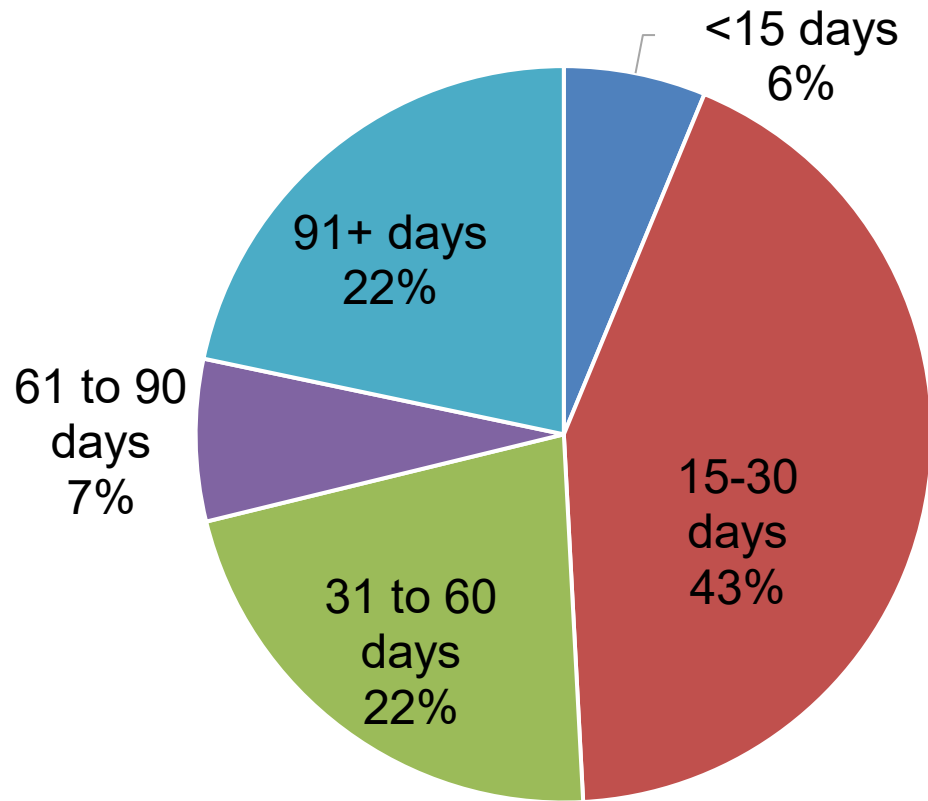
## Current Period



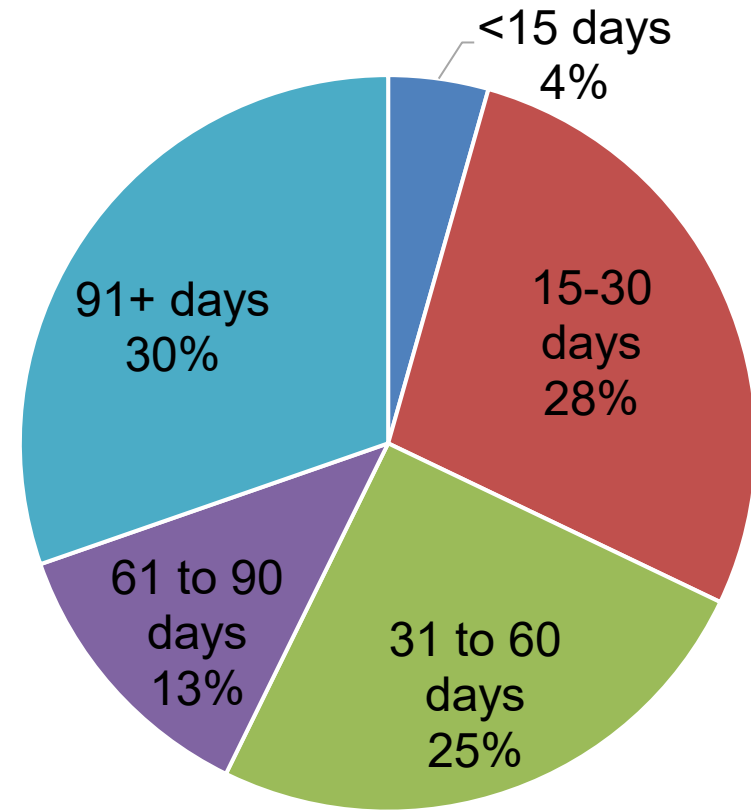
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Japan

## Pre-Pandemic

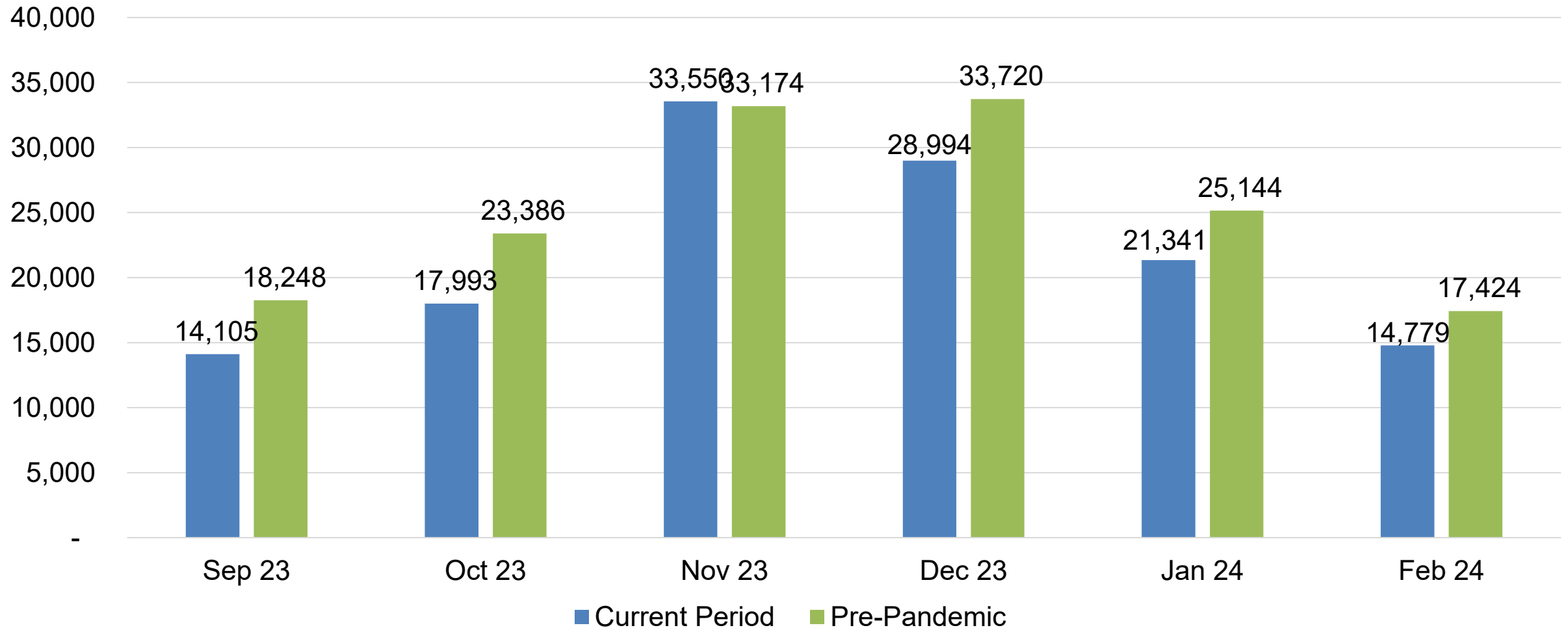


## Current Period



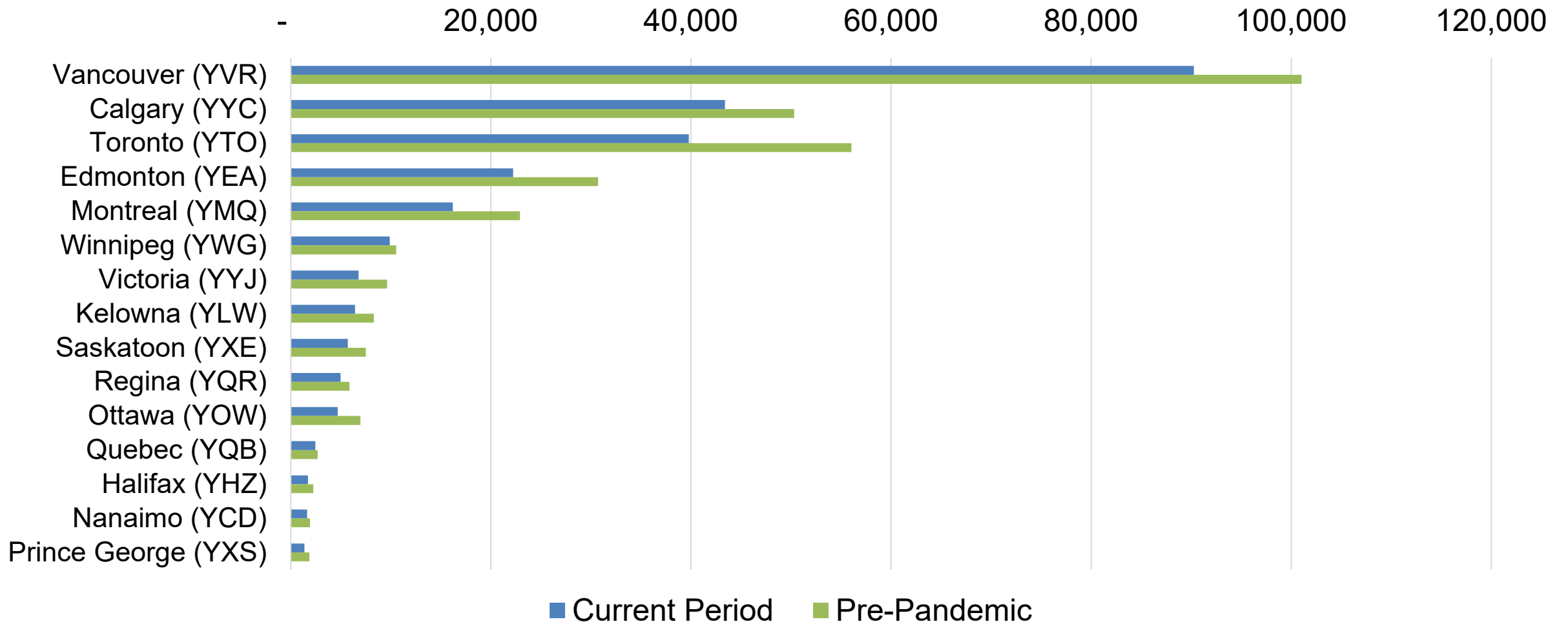
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway

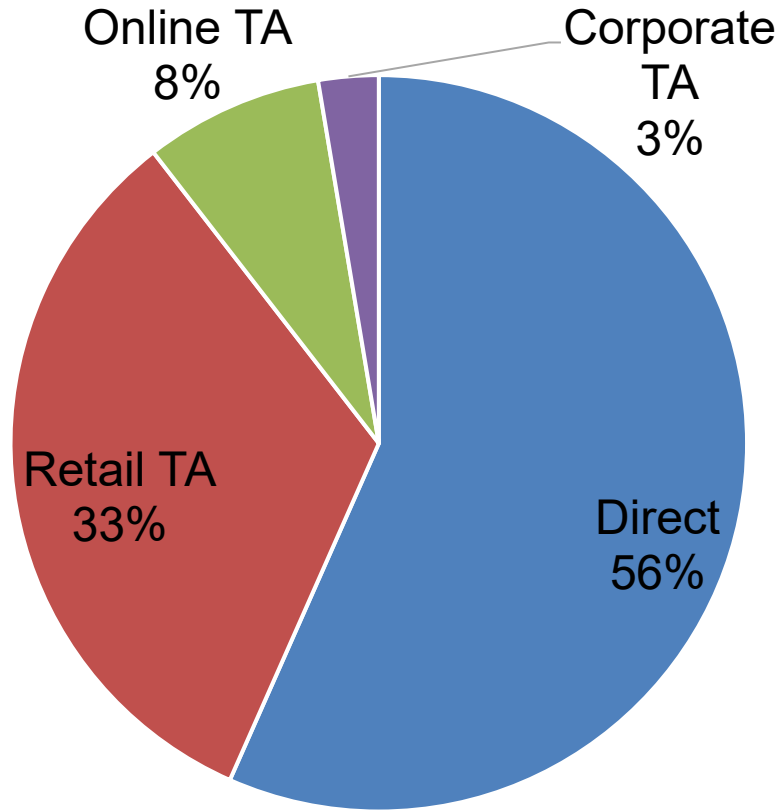
# Trip Origins: Canada



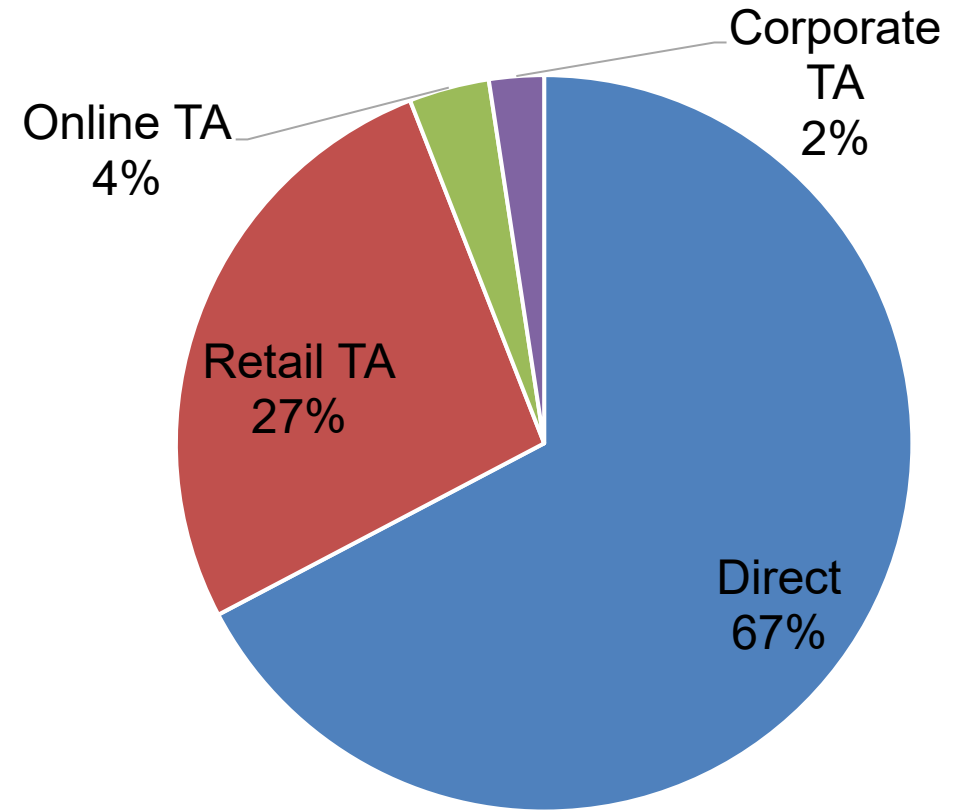
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Canada

## Pre-Pandemic



## Current Period

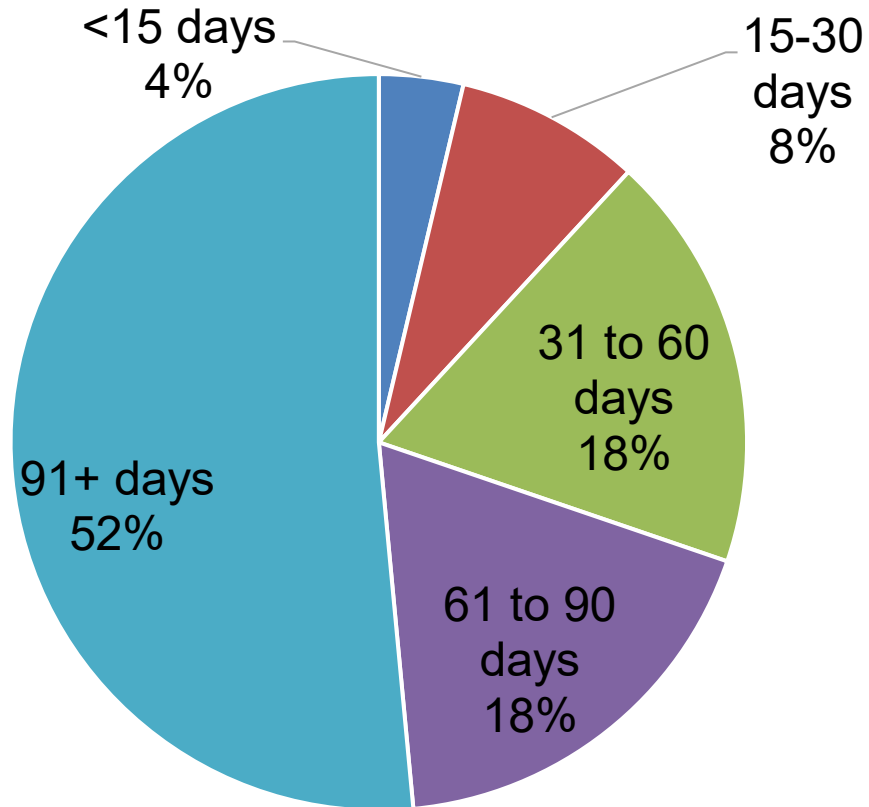


Source: ARC/ForwardKeys Destination Gateway

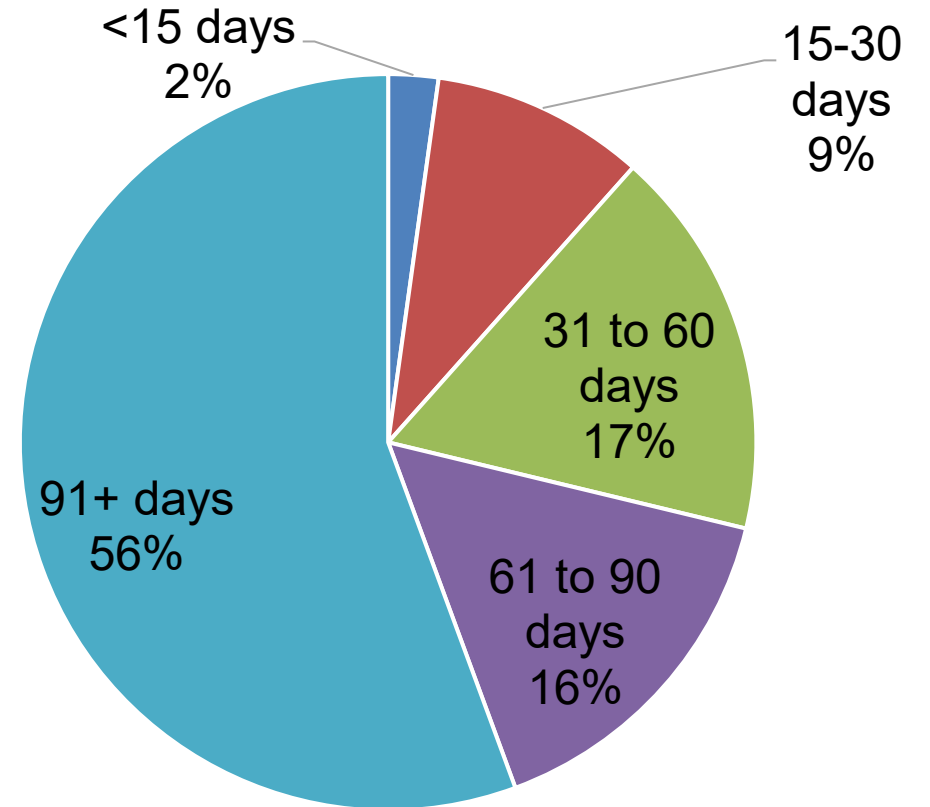


# Lead Time: Canada

## Pre-Pandemic

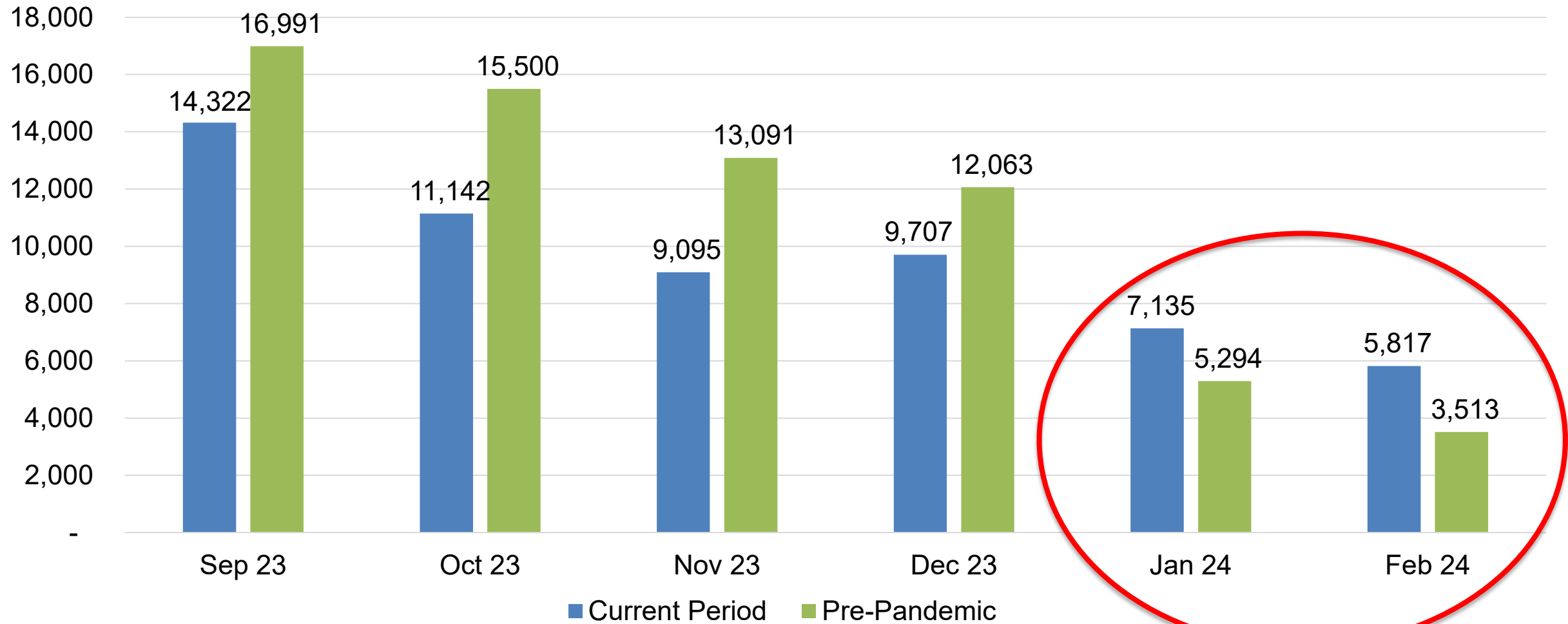


## Current Period



Source: ARC/ForwardKeys Destination Gateway

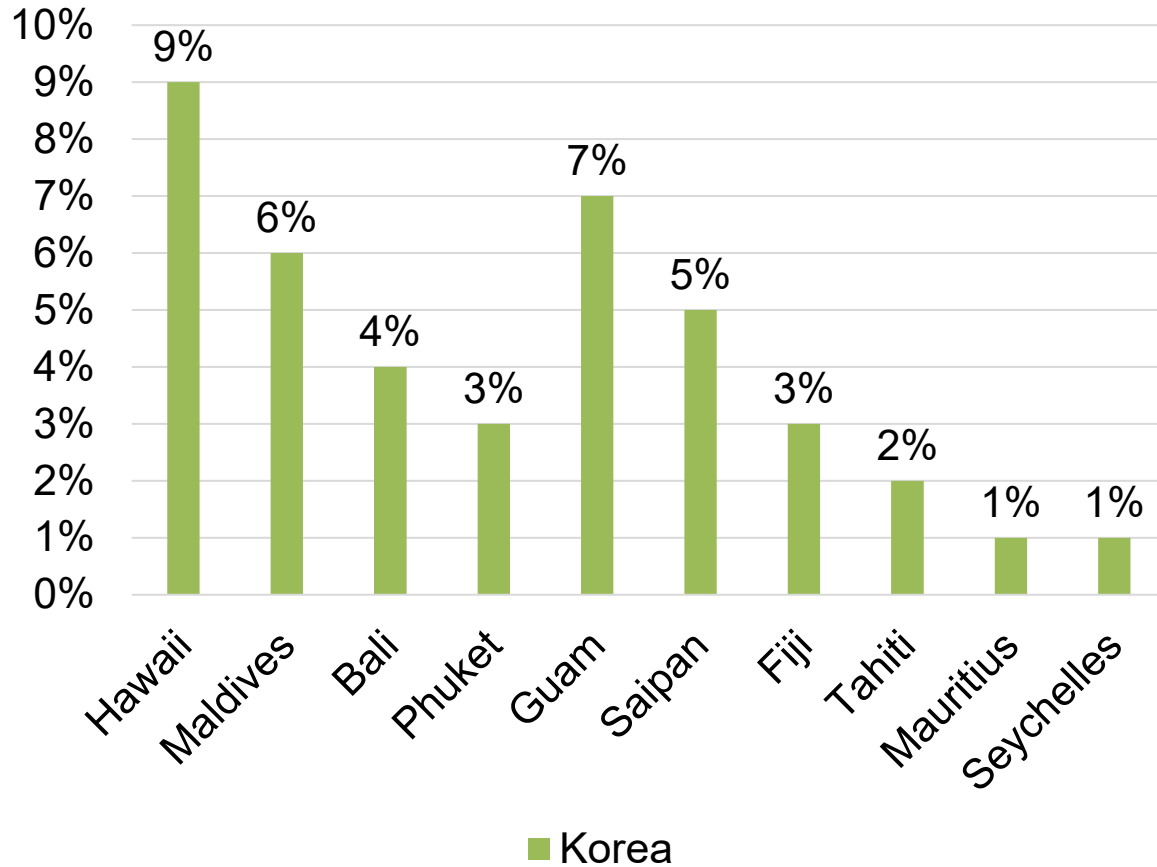
# Six Month Outlook: Korea



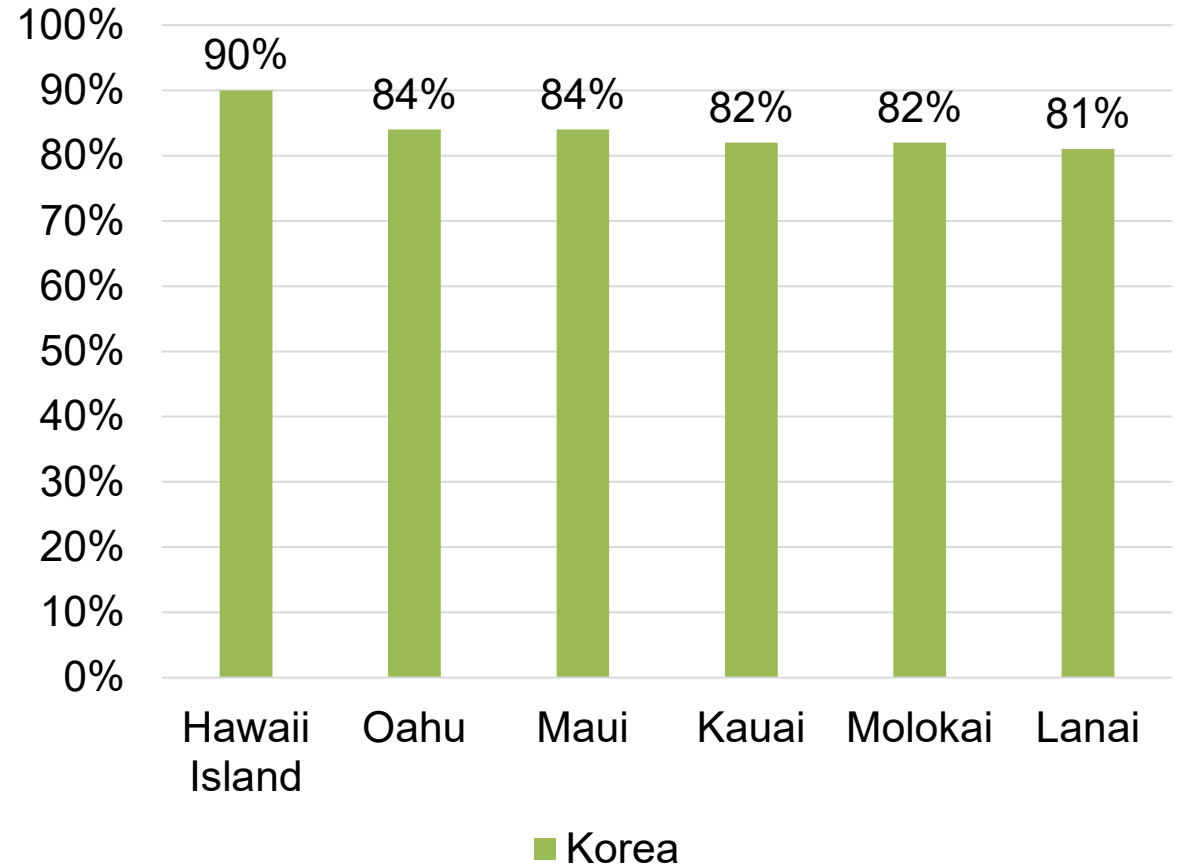
Source: ARC/ForwardKeys Destination Gateway

# MMGY Portrait of Asian International Travelers

## Interest in Visiting Island Destinations



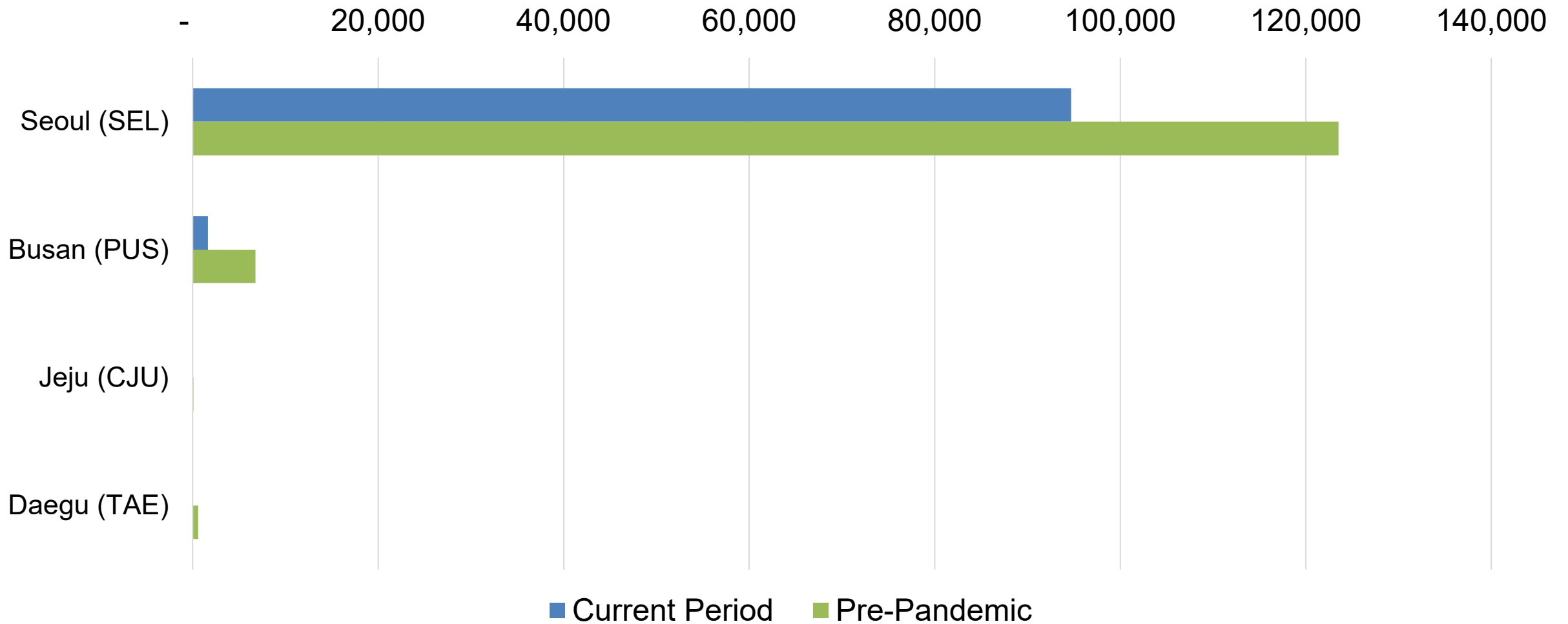
## Interest in Visiting Hawaiian Islands



Base: Asian International travelers (China: n=755; India: Japan: n=428; South Korea: n=429)

Source: MMGY Travel Intelligence's 2023 Portrait of Asian International travelers™

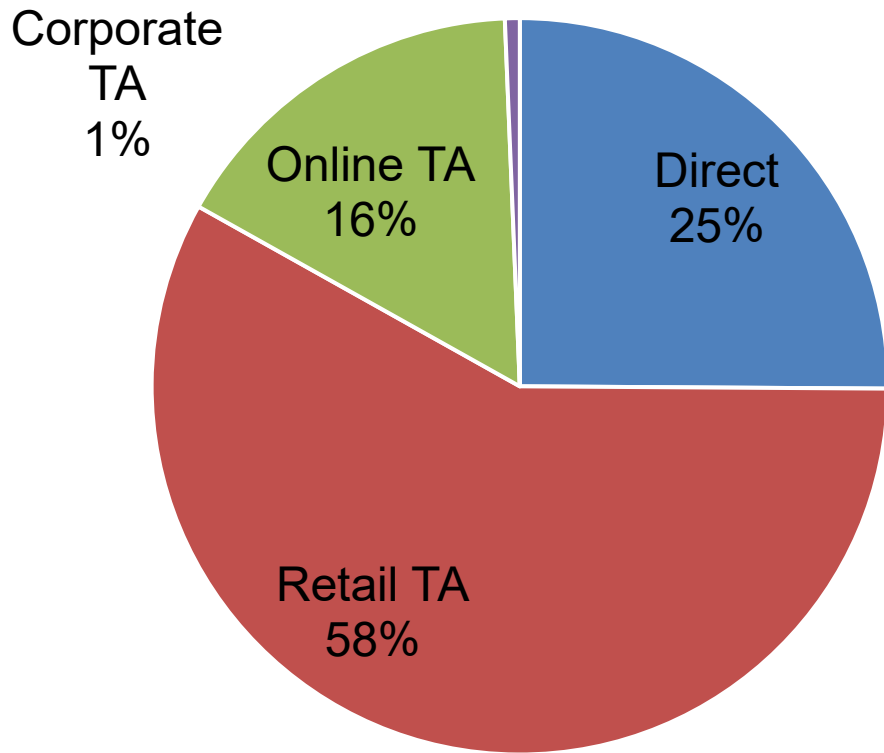
# Trip Origins: Korea



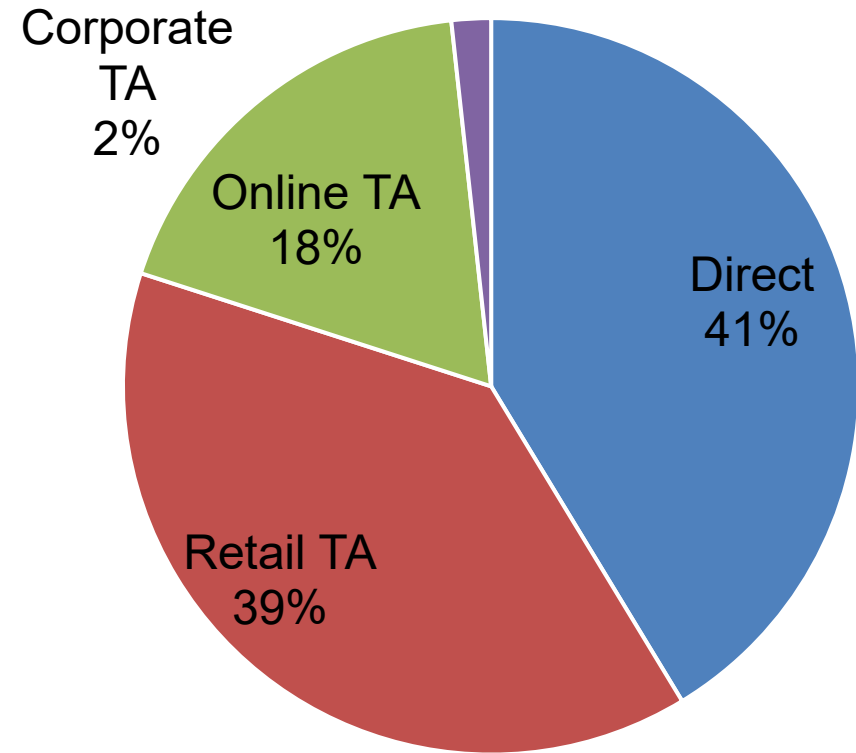
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Korea

## Pre-Pandemic



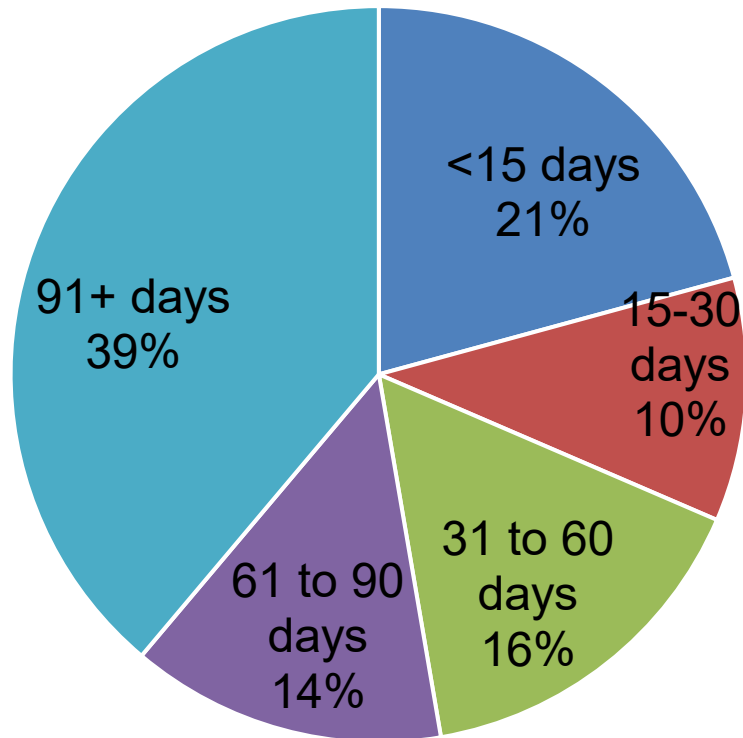
## Current Period



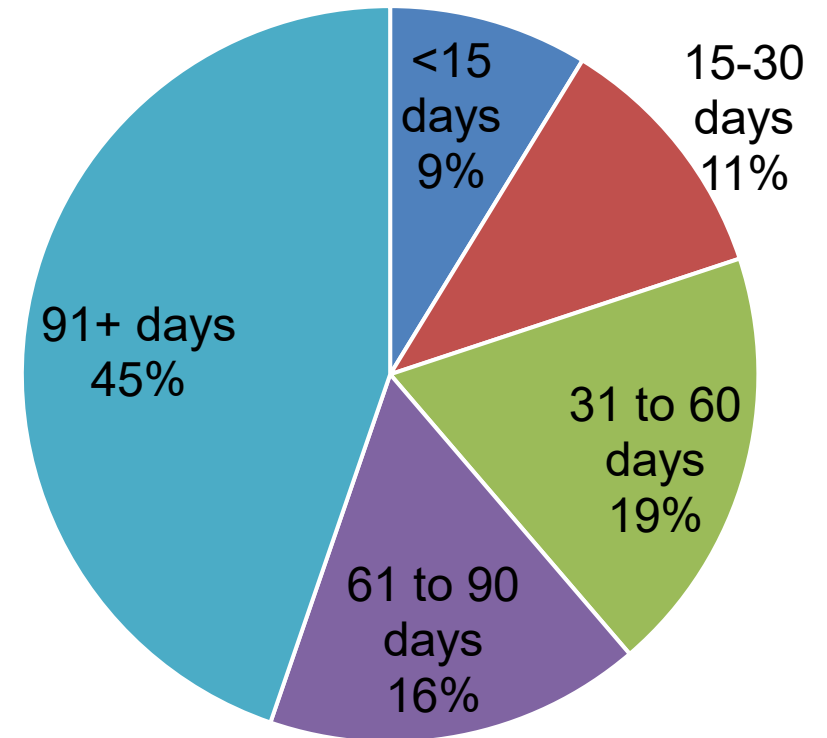
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Korea

## Pre-Pandemic

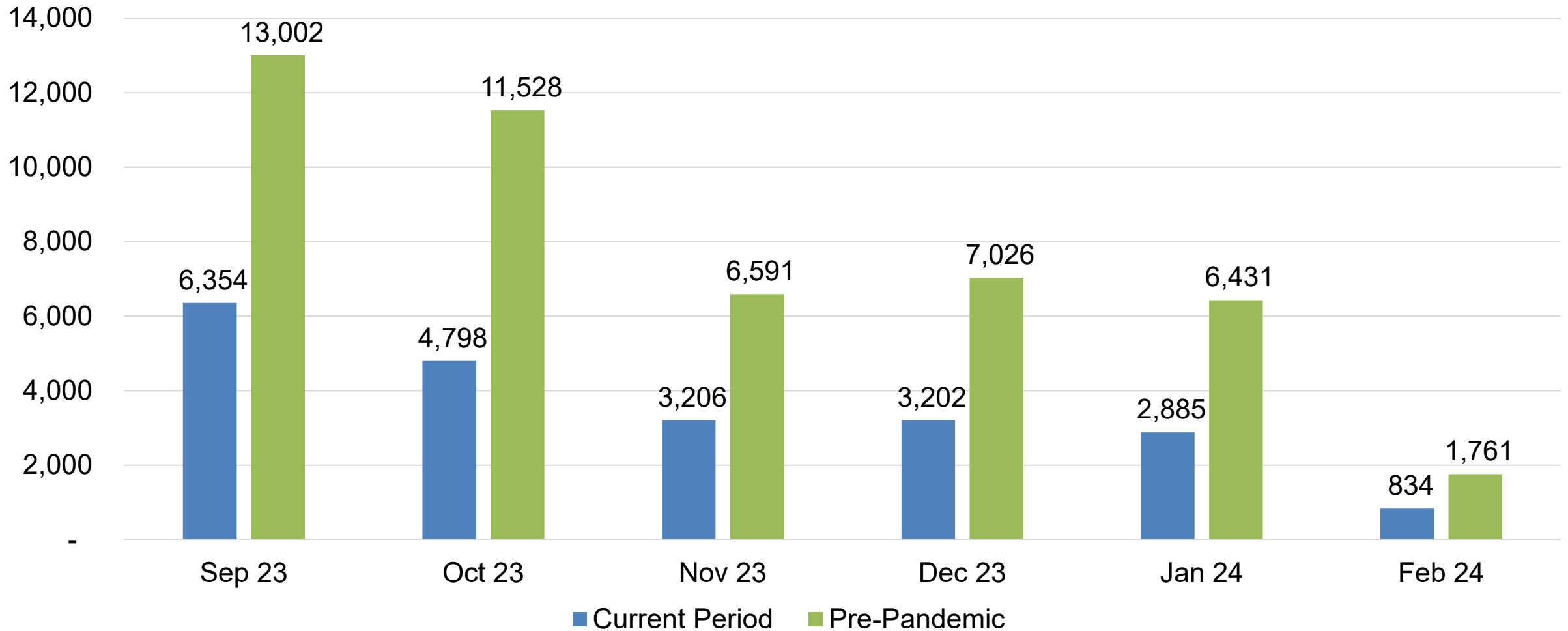


## Current Period



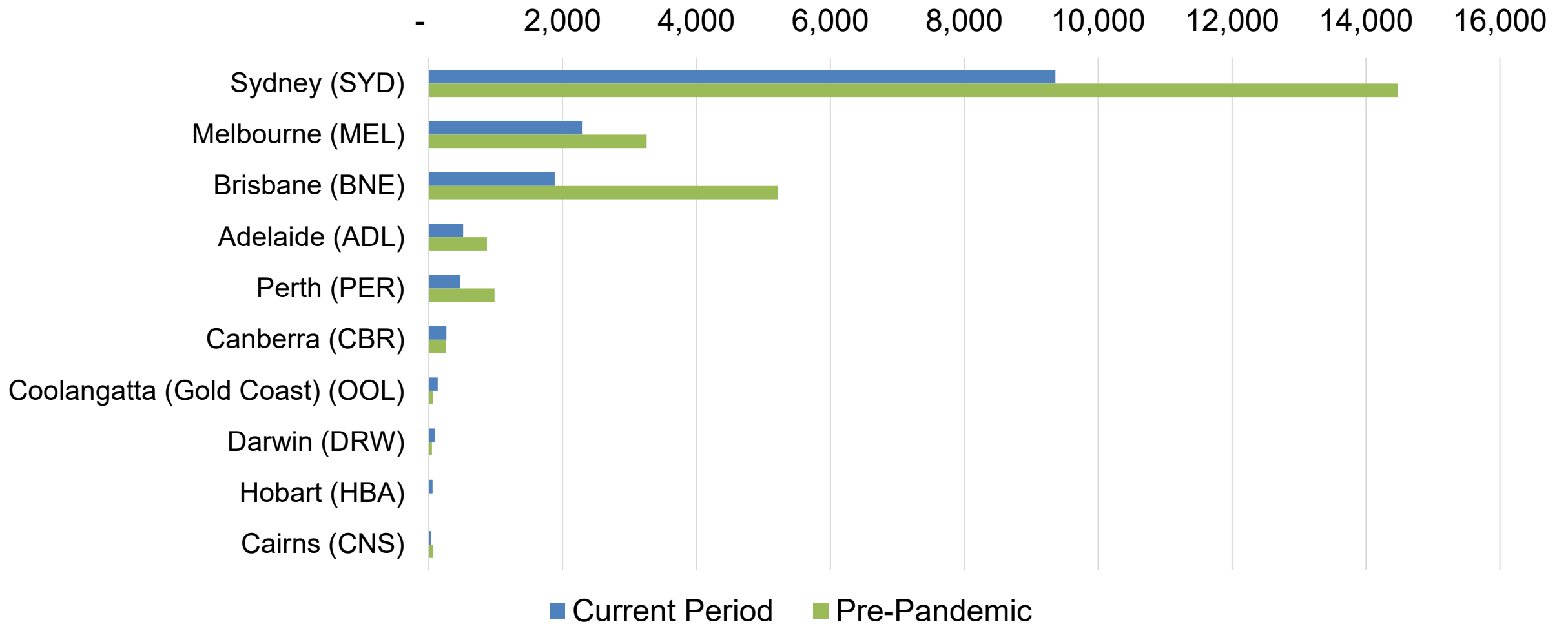
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

# Trip Origins: Australia

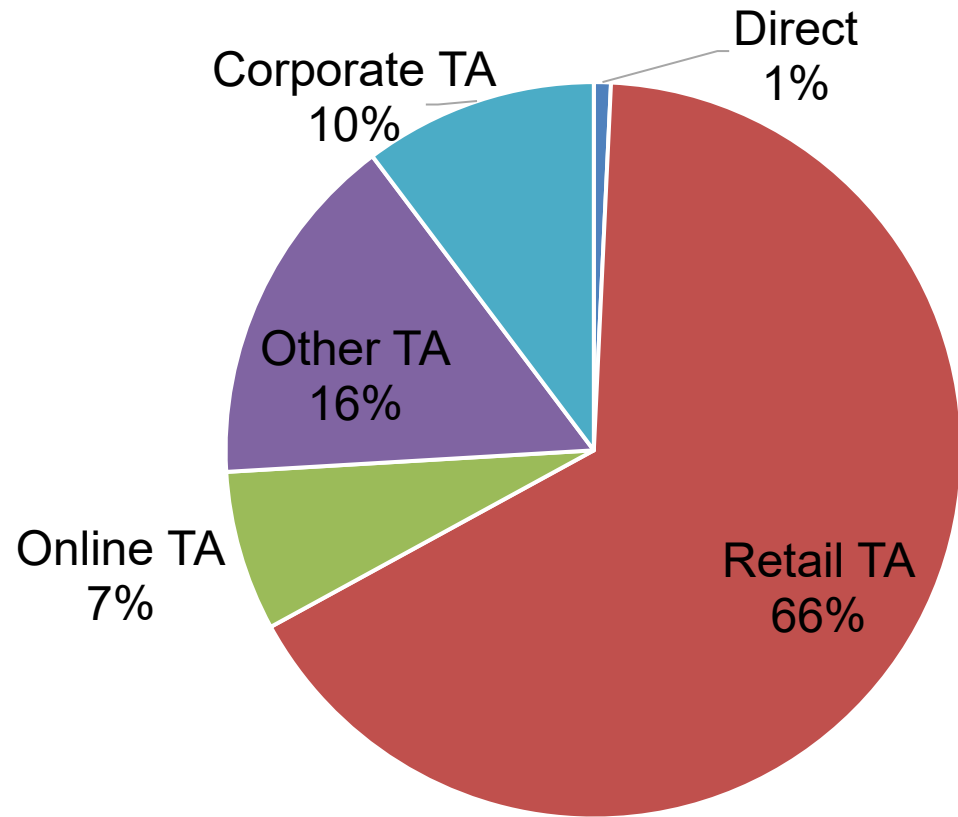


Source: ARC/ForwardKeys Destination Gateway

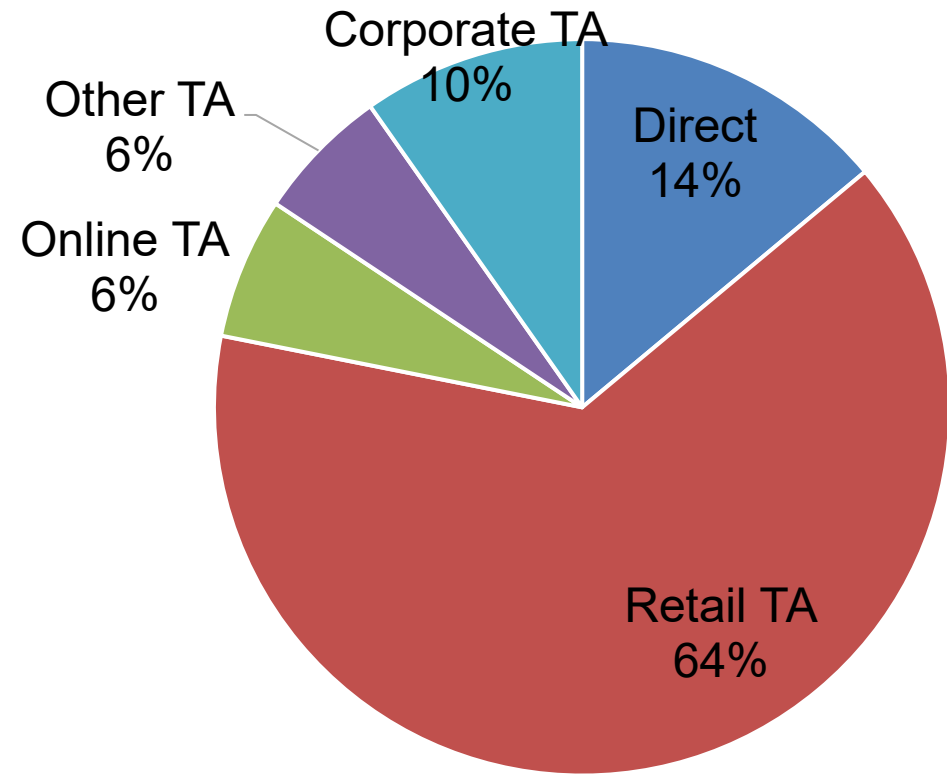


# Distribution Channel: Australia

## Pre-Pandemic



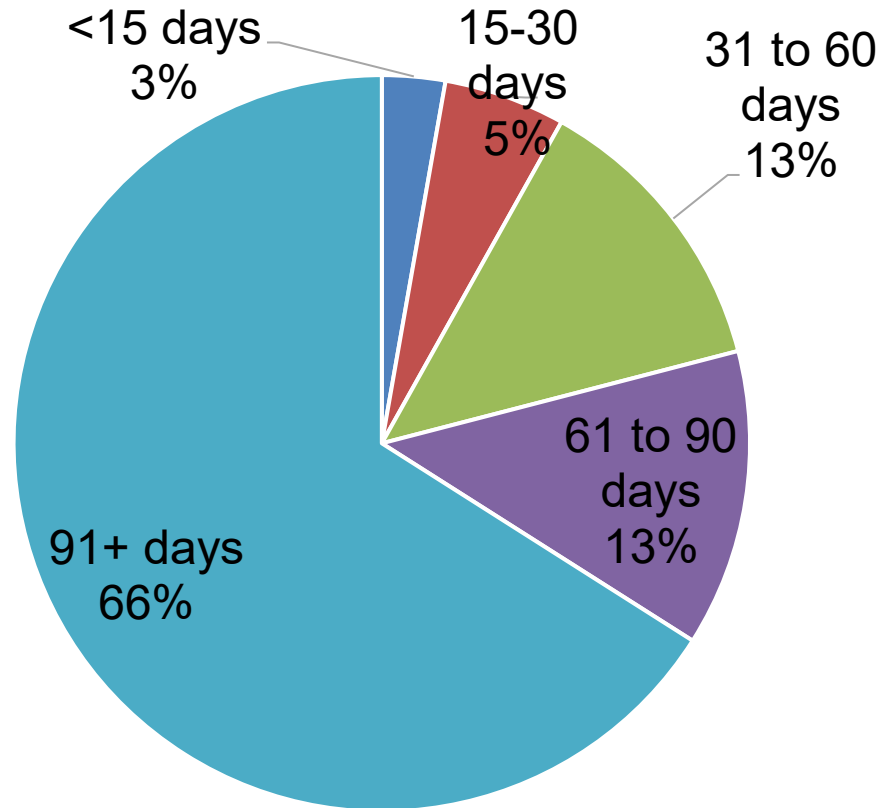
## Current Period



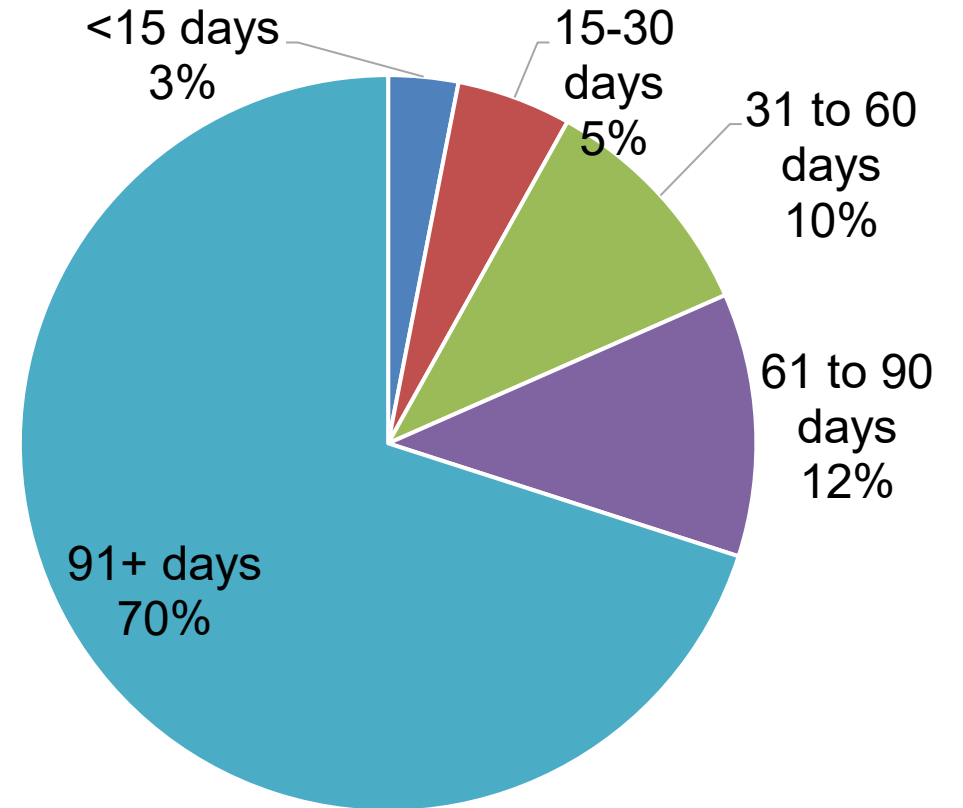
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Australia

## Pre-Pandemic

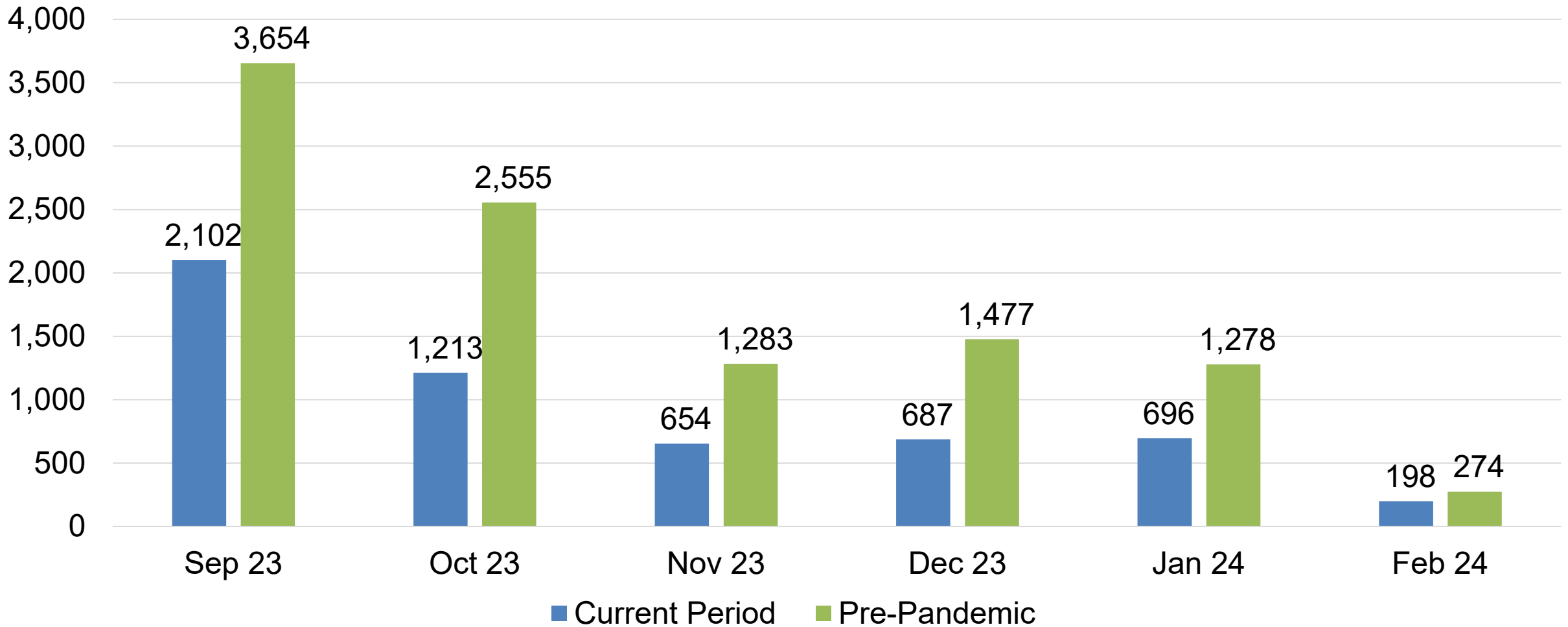


## Current Period



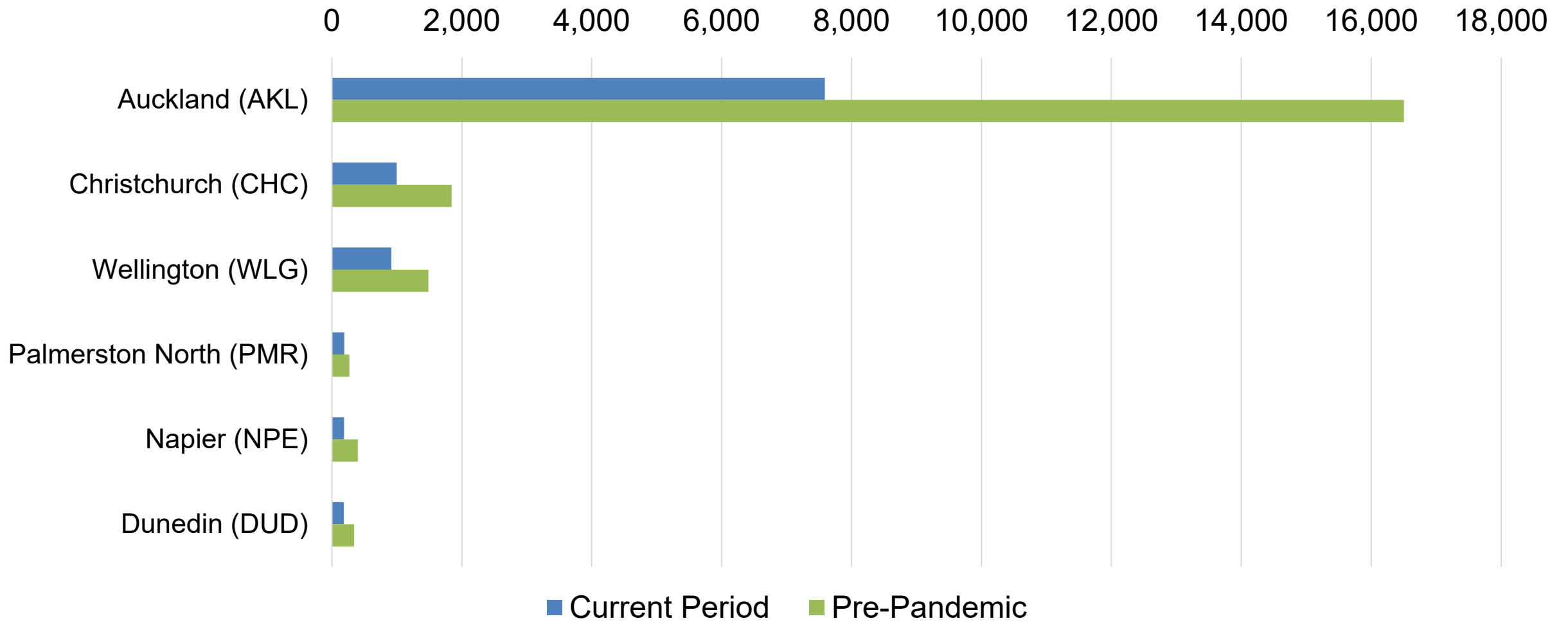
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: New Zealand



Source: ARC/ForwardKeys Destination Gateway

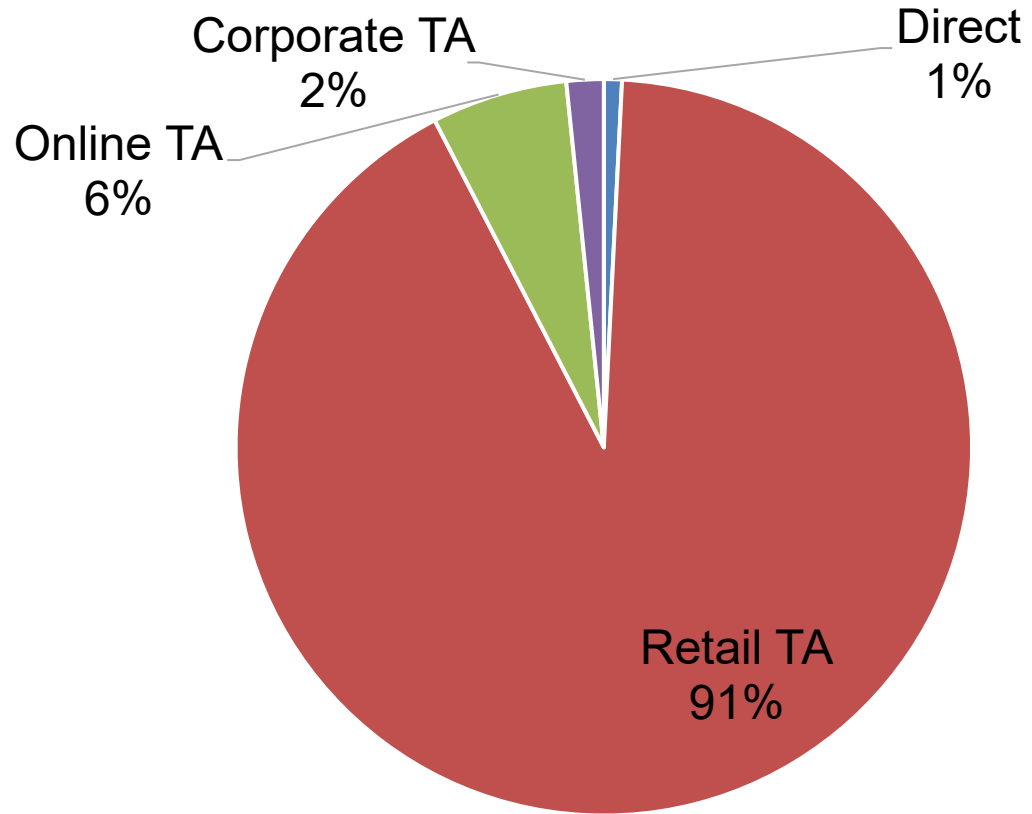
# Trip Origins: New Zealand



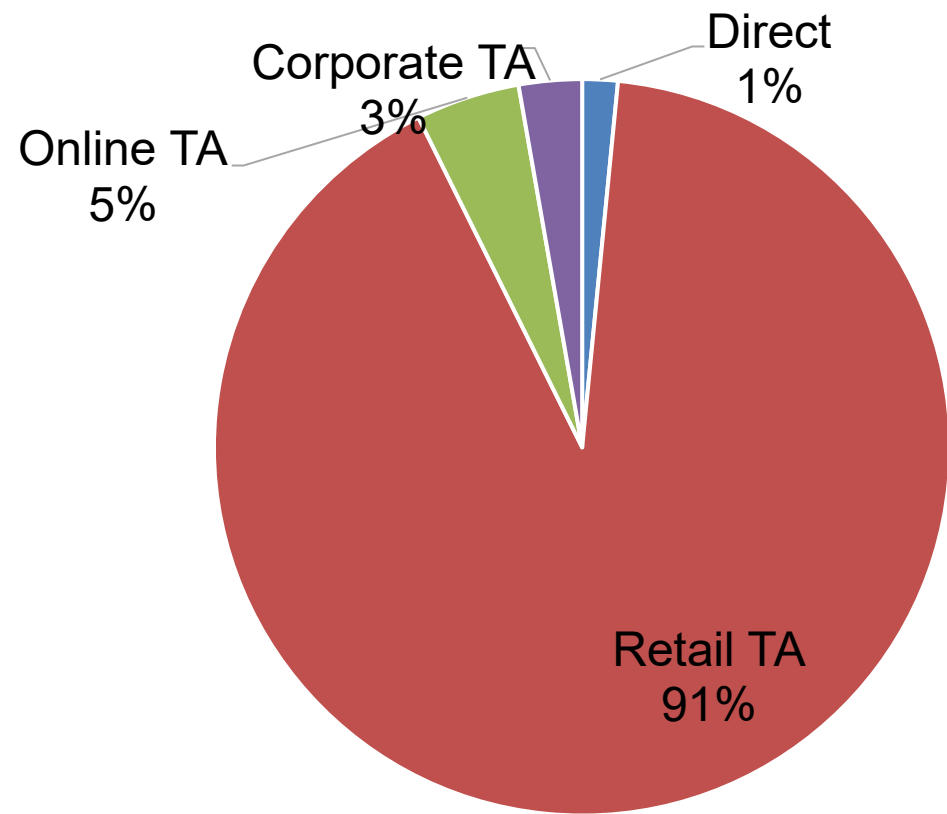
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: New Zealand

## Pre-Pandemic



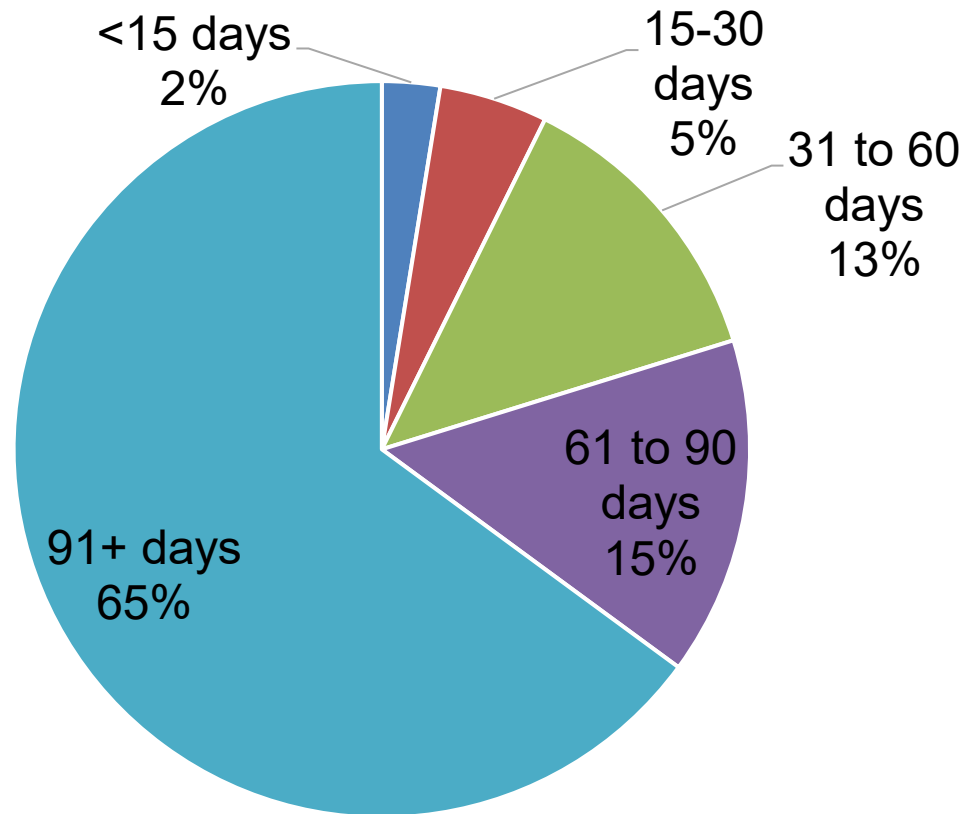
## Current Period



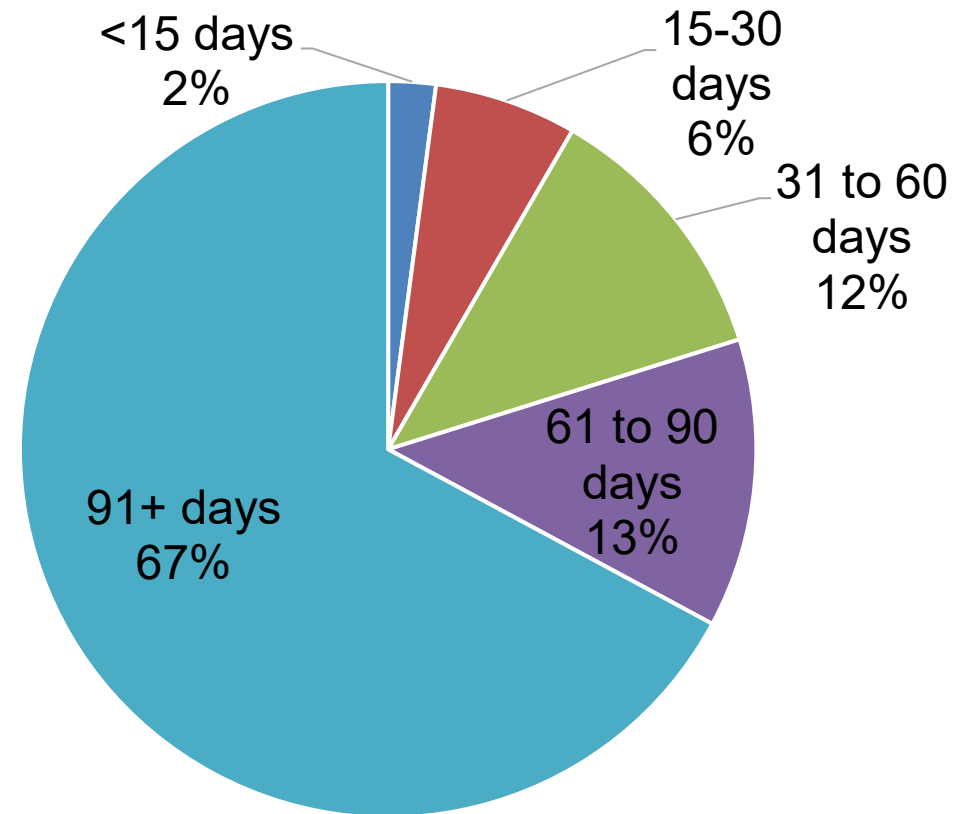
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: New Zealand

## Pre-Pandemic

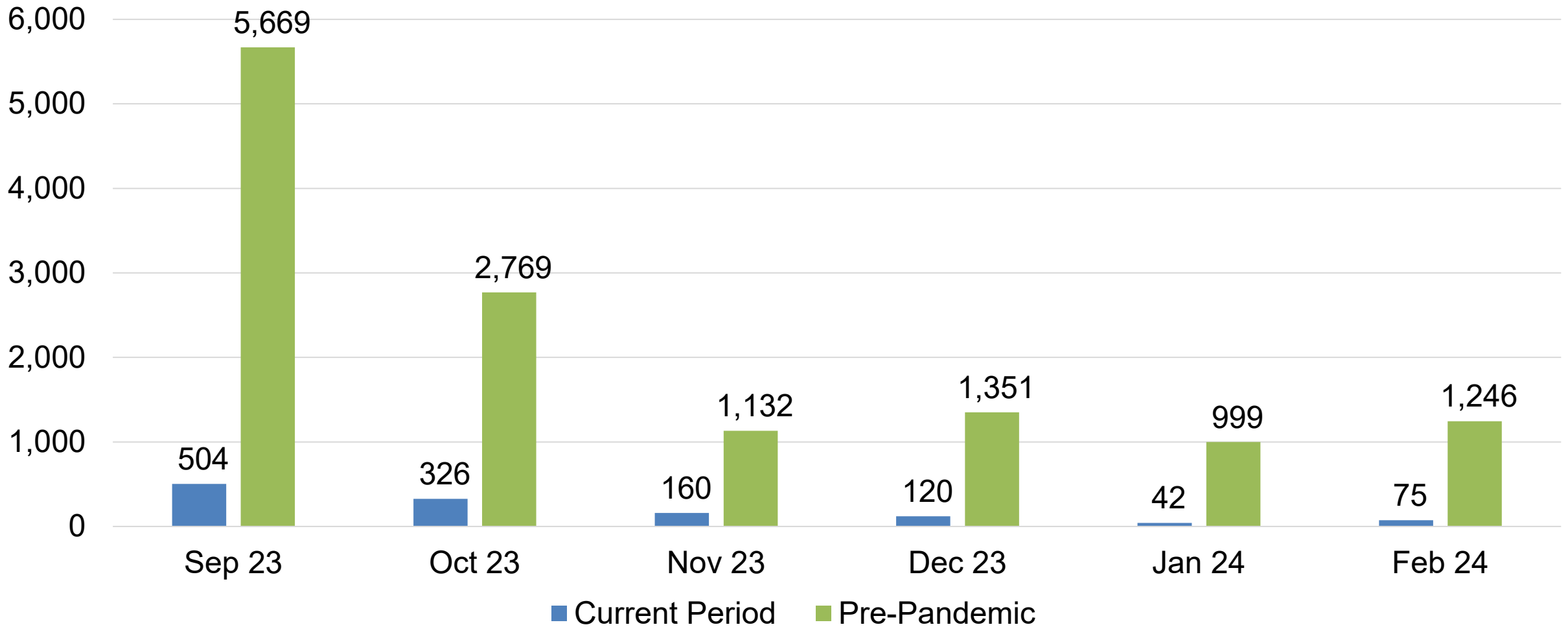


## Current Period



Source: ARC/ForwardKeys Destination Gateway

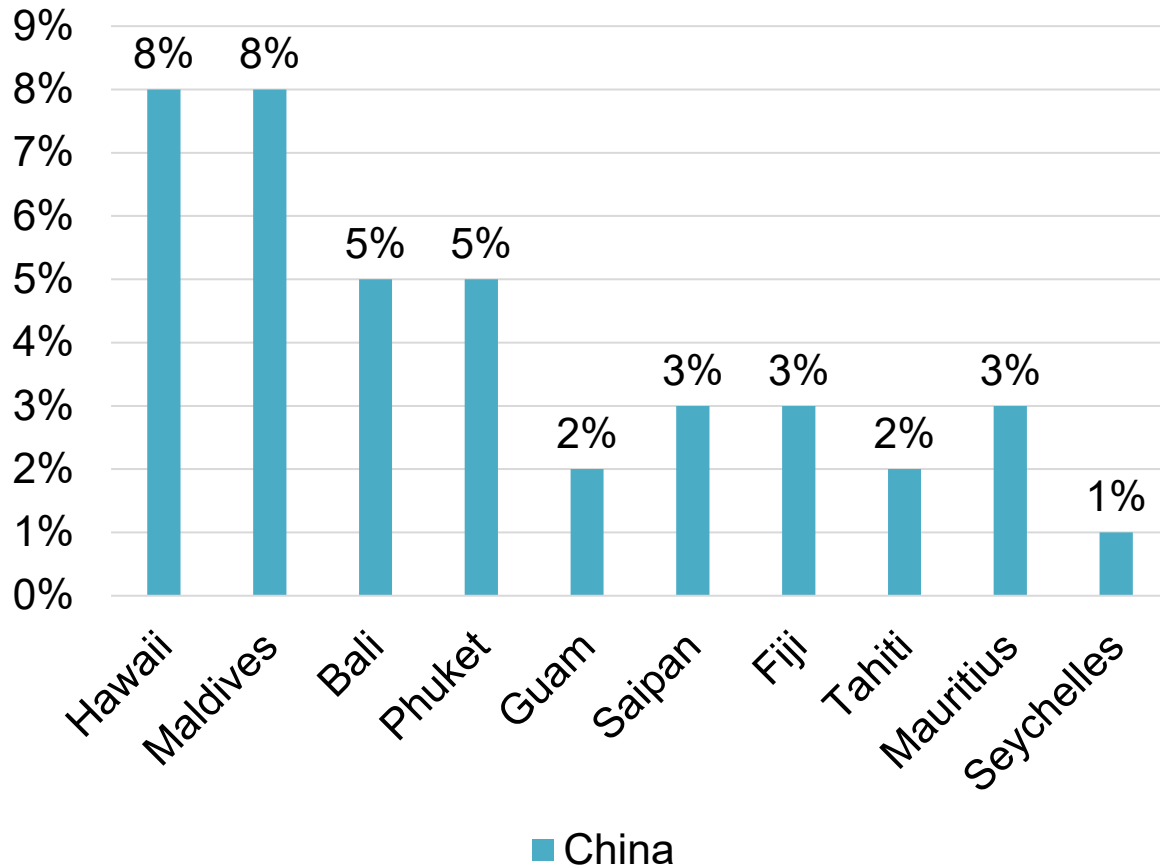
# Six Month Outlook: China



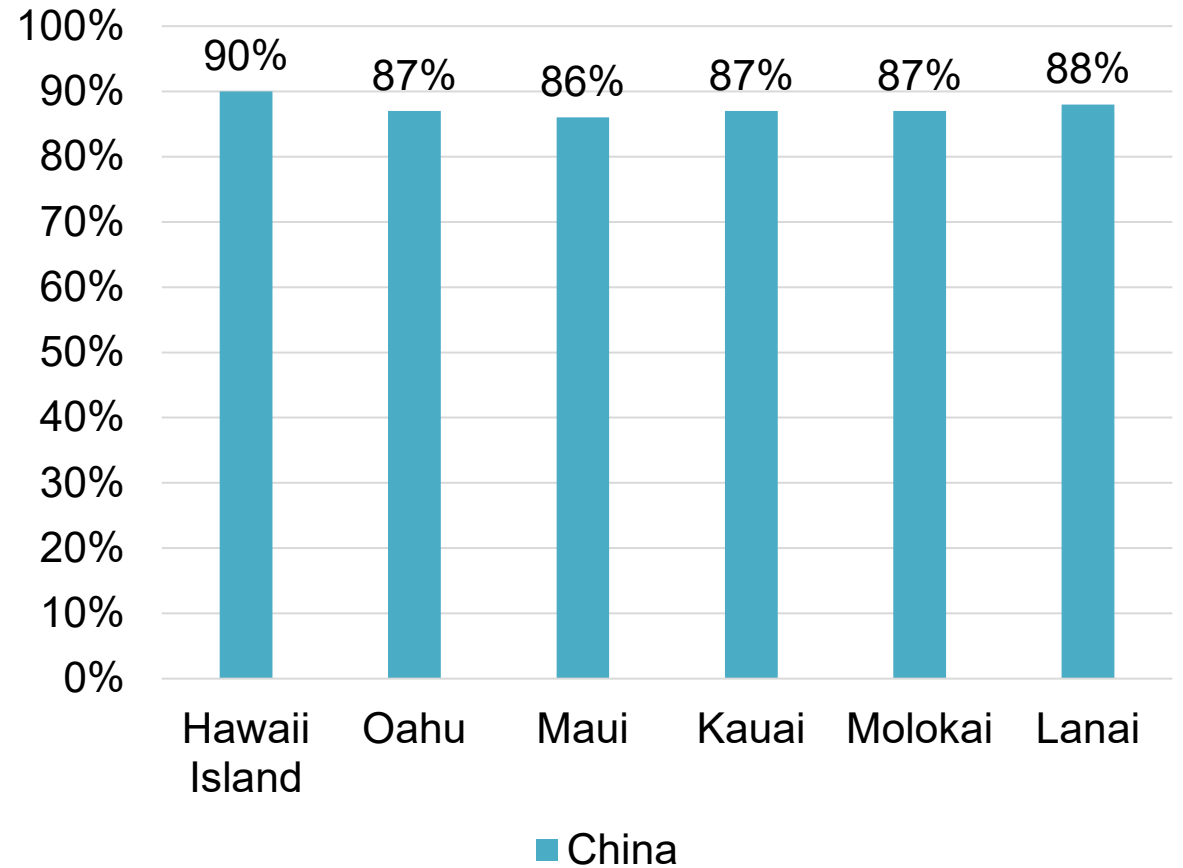
Source: ARC/ForwardKeys Destination Gateway

# MMGY Portrait of Asian International Travelers

## Interest in Visiting Island Destinations



## Interest in Visiting Hawaiian Islands

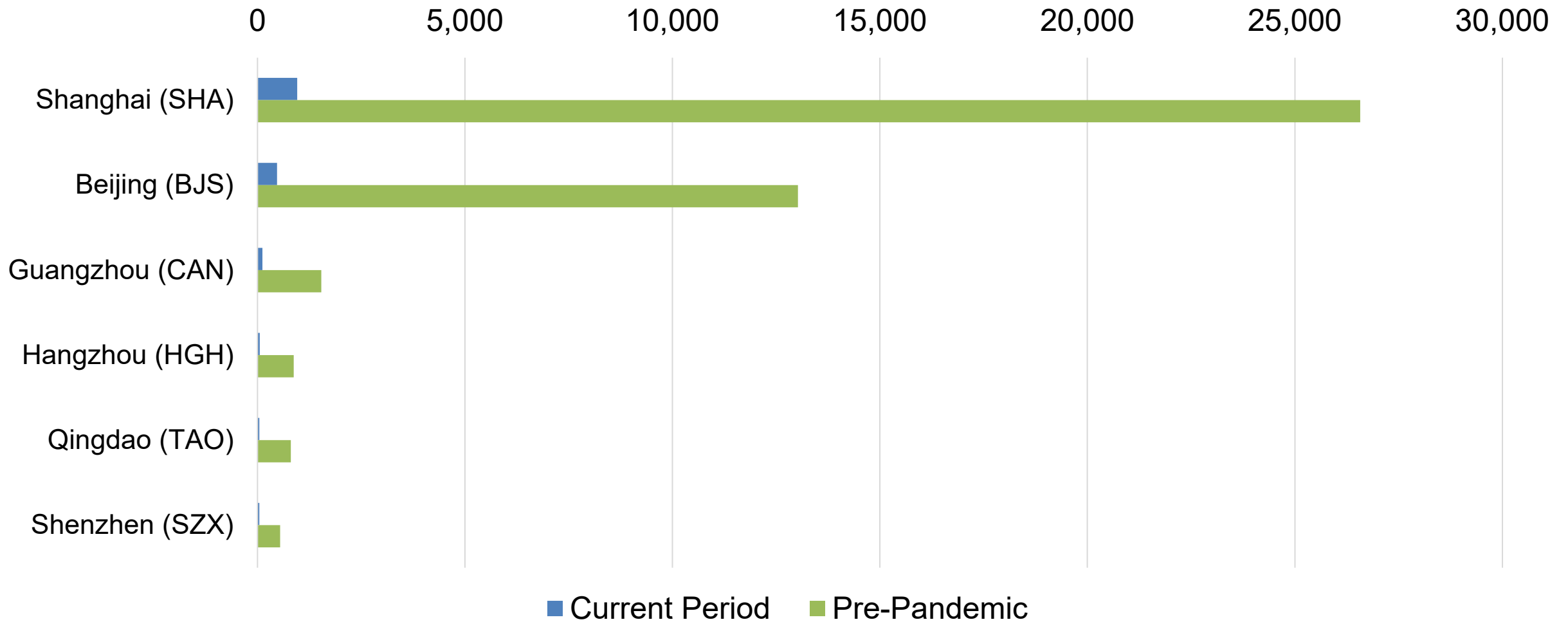


Base: Asian International travelers (China: n=755; India: Japan: n=428; South Korea: n=429)

Source: MMGY Travel Intelligence's 2023 Portrait of Asian International travelers™



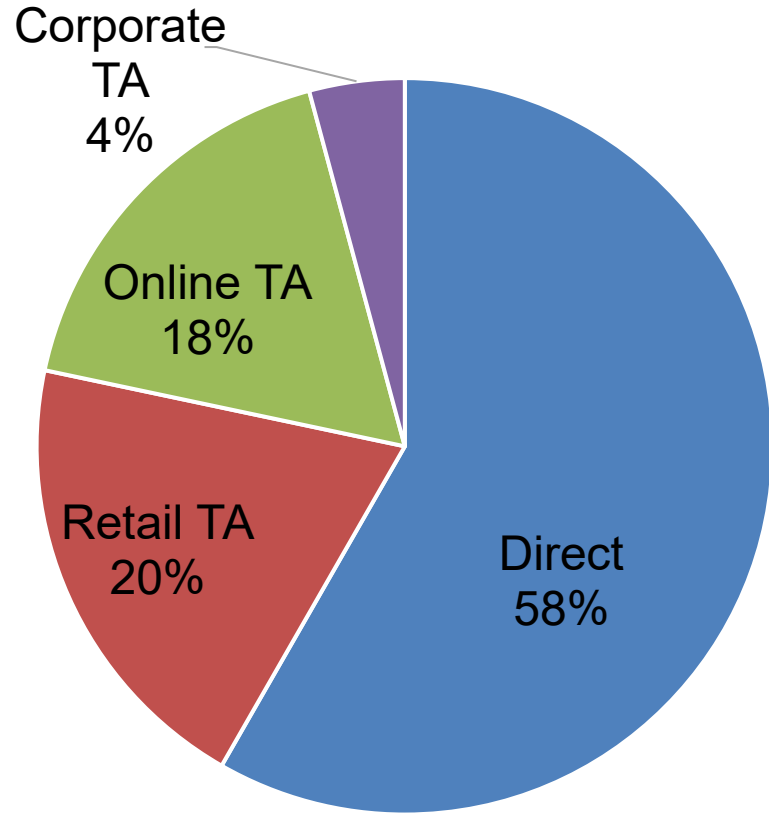
# Trip Origins: China



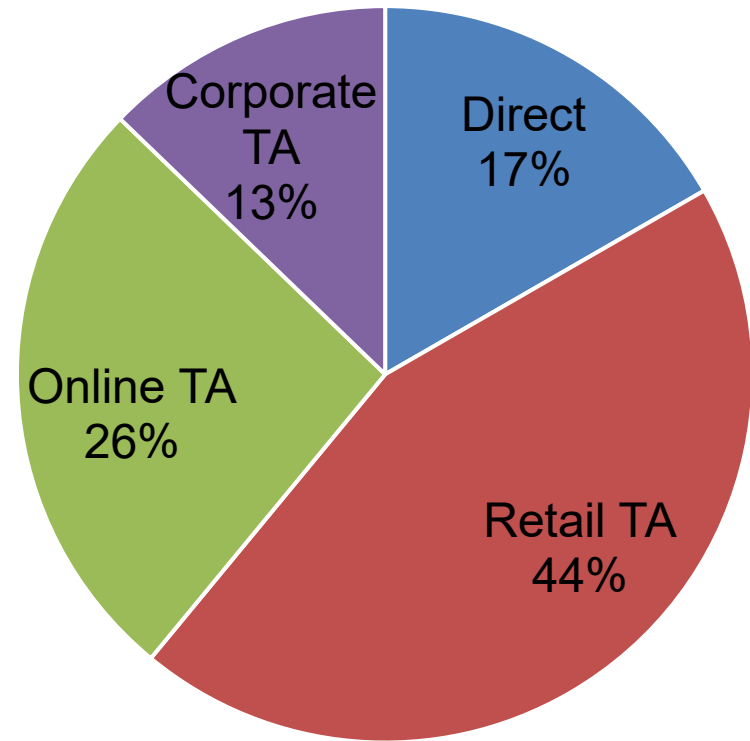
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: China

## Pre-Pandemic



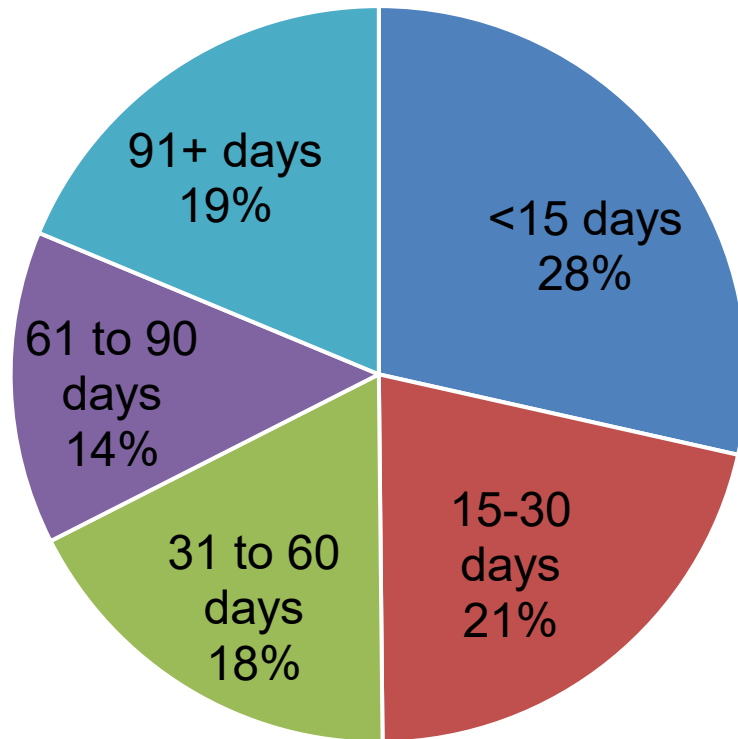
## Current Period



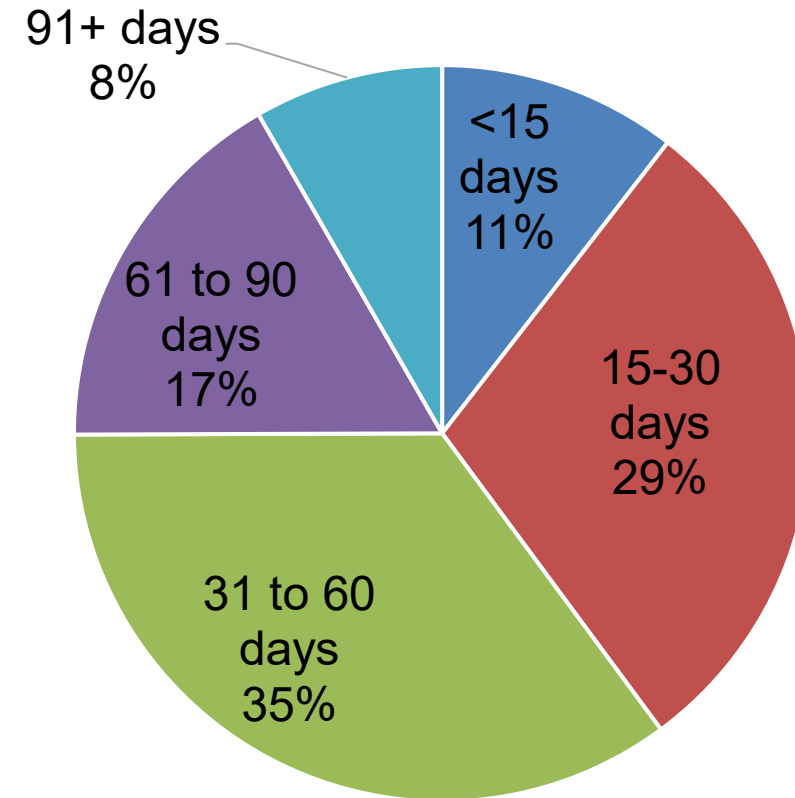
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: China

## Pre-Pandemic



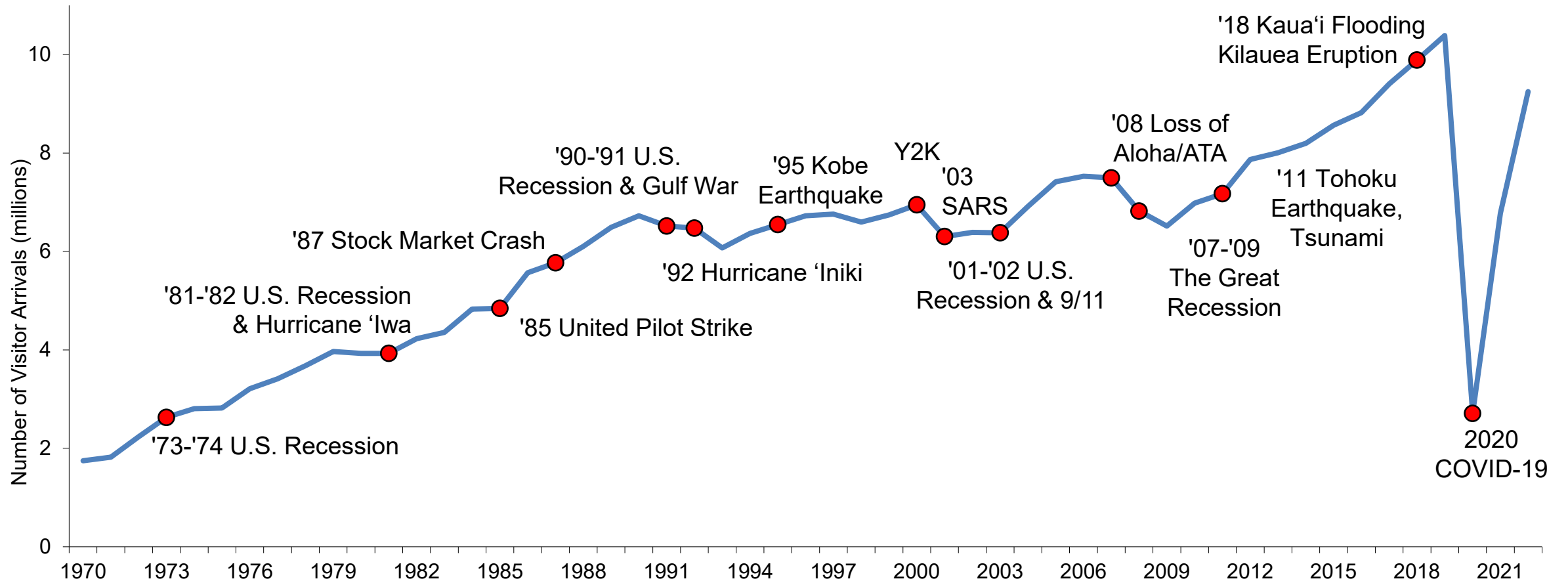
## Current Period



Source: ARC/ForwardKeys Destination Gateway

# Historical Visitor Arrivals

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



2022 data are preliminary.

# MAHALO!

