HANDOUT 07

HTA REGULAR BOARD MEETING

Thursday, February 26. 2026

Hōʻikeʻike Noiʻi ʻOihana Hoʻokipa

Presentation and Discussion of Current Market Insights and Conditions in Hawaiʻi and Key Major Hawaiʻi Tourism Markets

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HAWAIʻI TOURISM AUTHORITY

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

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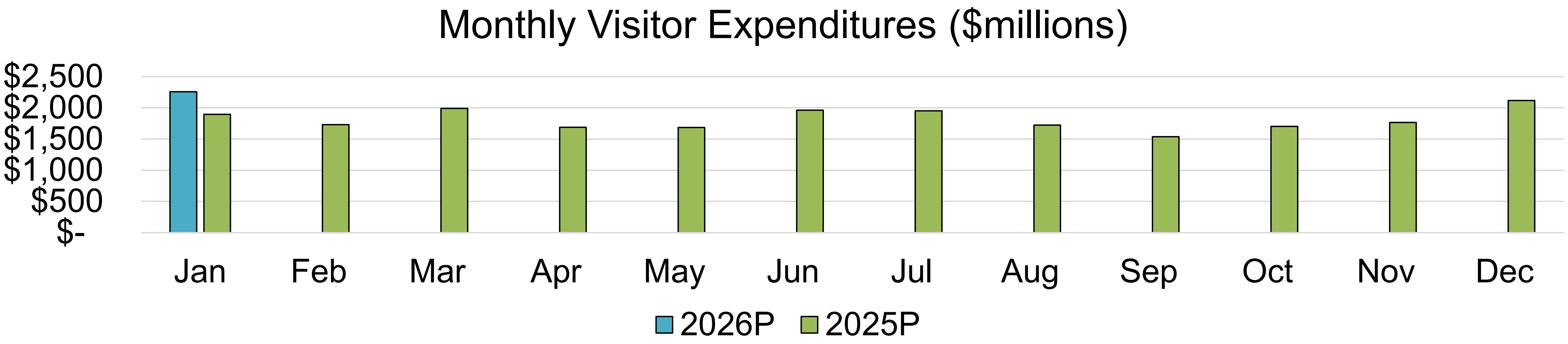
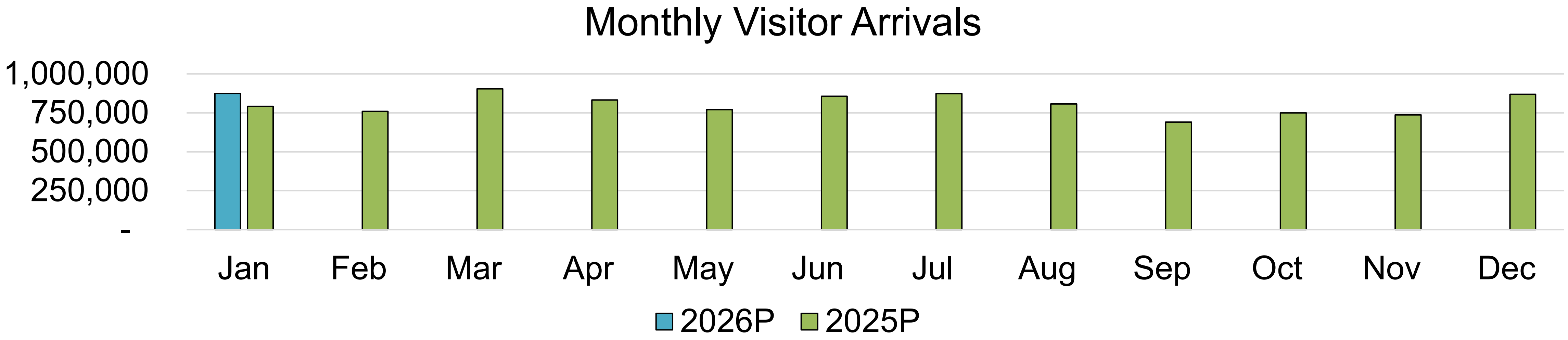
January 2026 Highlights – Expenditures and Arrivals





Note: 2025 and 2026 figures are preliminary.

January 2026 Highlights by Market

EXPENDITURES ($mil.)	2026P	2025P	% Change
TOTAL (AIR)	2,250.3	1,888.9	19.1%
U.S. West	1,061.5	812.0	30.7%
U.S. East	749.7	601.8	24.6%
Japan	83.2	83.2	-0.1%
Canada	134.6	150.0	-10.3%
All Others	221.3	241.9	-8.5%

PPPD SPENDING ($)	2026P	2025P	% Change
TOTAL (AIR)	277.8	249.9	11.2%
U.S. West	266.7	239.5	11.3%
U.S. East	311.9	264.1	18.1%
Japan	249.9	248.0	0.8%
Canada	228.8	224.8	1.8%
All Others	278.3	272.6	2.1%

VISITOR ARRIVALS	2026P	2025P	% Change
TOTAL (AIR)	858,693	773,149	11.1%
U.S. West	419,156	368,123	13.9%
U.S. East	255,548	207,519	23.1%
Japan	56,731	54,296	4.5%
Canada	49,616	54,333	-8.7%
All Others	77,641	88,878	-12.6%

AVERAGE DAILY CENSUS	2026P	2025P	% Change
TOTAL (AIR)	261,290	243,829	7.2%
U.S. West	128,389	109,352	17.4%
U.S. East	77,527	73,504	5.5%
Japan	10,738	10,826	-0.8%
Canada	18,978	21,522	-11.8%
All Others	25,658	28,625	-10.4%

Note: 2025 and 2026 figures are preliminary.

January 2026 Highlights by Island

EXPENDITURES ($mil.)	2026P	2025P	% Change
O‘ahu	937.0	772.0	21.4%
Maui	664.7	534.9	24.3%
Moloka‘i	5.2	4.1	27.3%
Lāna‘i	8.7	10.3	-15.9%
Kaua‘i	286.3	259.2	10.5%
Hawai‘i Island	348.4	308.4	13.0%

PPPD SPENDING ($)	2026P	2025P	% Change
O‘ahu	244.5	224.4	9.0%
Maui	329.4	297.7	10.7%
Moloka‘i	171.3	213.8	-19.9%
Lāna‘i	711.5	748.0	-4.9%
Kaua‘i	308.7	293.8	5.1%
Hawai‘i Island	272.2	219.3	24.1%

VISITOR ARRIVALS	2026P	2025P	% Change
O‘ahu	527,241	457,278	15.3%
Maui	236,180	202,416	16.7%
Moloka‘i	3,295	2,843	15.9%
Lāna‘i	3,284	3,608	-9.0%
Kaua‘i	121,293	110,162	10.1%
Hawai‘i Island	154,982	159,312	-2.7%

AVERAGE DAILY CENSUS	2026P	2025P	% Change
O‘ahu	123,616	110,976	11.4%
Maui	65,090	57,960	12.3%
Moloka‘i	985	620	58.9%
Lāna‘i	393	445	-11.6%
Kaua‘i	29,919	28,462	5.1%
Hawai‘i Island	41,286	45,366	-9.0%

Note: 2025 and 2026 figures are preliminary.

DBEDT HAWAI‘I TOURISM AUTHORITY

January 2026 Highlights – Purpose of Trip

PURPOSE OF TRIP - % Total	Total by Air		US West		US East		Japan		Canada	
	2026P	2025P	2026P	2025P	2026P	2025P	2026P	2025P	2026P	2025P
Pleasure (Net)	**82.8%**	**81.8%**	**80.0%**	**80.9%**	**81.9%**	**76.3%**	**91.5%**	**88.9%**	**94.0%**	**92.3%**
Honeymoon/Get Married	3.2%	3.2%	1.7%	1.9%	2.9%	2.9%	10.4%	10.1%	1.4%	1.5%
Honeymoon	2.8%	2.8%	1.2%	1.5%	2.7%	2.5%	10.1%	10.0%	1.4%	1.5%
Get Married	0.5%	0.5%	0.5%	0.5%	0.3%	0.5%	0.6%	0.8%	0.5%	0.1%
Pleasure/Vacation	80.0%	79.0%	78.6%	79.3%	79.1%	73.8%	82.2%	79.5%	92.7%	91.0%
Mtgs/Conventions/Incentive	**4.1%**	**6.6%**	**3.5%**	**5.4%**	**4.4%**	**10.4%**	**5.3%**	**6.2%**	**4.3%**	**4.6%**
Conventions	3.1%	5.0%	2.7%	4.1%	3.6%	8.6%	0.8%	1.0%	3.5%	4.3%
Corporate Meetings	0.5%	0.9%	0.6%	0.9%	0.5%	1.4%	0.1%	0.2%	0.1%	0.4%
Incentive	0.6%	0.8%	0.3%	0.5%	0.4%	0.7%	4.5%	5.1%	0.7%	0.1%
Other Business	2.4%	3.0%	3.8%	3.5%	1.3%	4.1%	0.3%	0.4%	0.5%	0.4%
Visit Friends/Rel.	8.9%	9.6%	10.6%	11.0%	9.2%	11.3%	1.9%	3.1%	3.4%	5.4%
Gov't/Military	0.6%	1.2%	0.6%	1.0%	0.9%	2.6%	0.1%	0.1%	0.0%	0.1%
Attend School	0.1%	0.3%	0.2%	0.3%	0.1%	0.4%	0.1%	0.4%	0.0%	0.1%
Sport Events	1.8%	1.5%	2.5%	2.1%	1.5%	1.0%	0.9%	1.4%	0.4%	1.3%
Other	4.2%	3.1%	4.5%	3.1%	5.1%	3.2%	3.1%	3.1%	0.7%	2.0%

Note: 2025 and 2026 figures are preliminary.

January 2026 Highlights – Accommodation Choice

ACCOMMODATIONS - % Total	Total by Air		US West		US East		Japan		Canada	
	2026P	2025P	2026P	2025P	2026P	2025P	2026P	2025P	2026P	2025P
Plan to stay in Hotel	55.0%	58.3%	49.1%	52.1%	52.0%	58.6%	83.7%	78.5%	53.3%	52.0%
Plan to stay in Condo	17.9%	50.7%	20.9%	46.4%	16.6%	48.4%	11.3%	74.8%	21.0%	42.7%
Plan to stay in Timeshare	8.4%	15.4%	8.6%	16.7%	10.0%	13.0%	6.3%	14.6%	11.5%	23.3%
Cruise Ship	0.5%	12.5%	0.3%	14.2%	0.8%	9.9%	0.0%	11.8%	1.1%	20.1%
Friends/Relatives	11.1%	8.0%	13.2%	8.7%	12.1%	8.8%	0.9%	7.8%	5.9%	9.7%
Bed & Breakfast	0.9%	6.5%	0.6%	7.2%	1.0%	6.8%	0.1%	6.4%	0.8%	7.6%
Rental House	10.3%	1.6%	10.3%	0.6%	12.2%	3.4%	0.1%	0.1%	10.9%	1.8%
Hostel	0.7%	10.5%	0.5%	12.3%	0.6%	11.9%	0.1%	2.3%	1.1%	7.1%
Camp Site, Beach	0.4%	1.0%	0.2%	1.0%	0.4%	1.1%	0.1%	0.0%	1.0%	0.8%
Private Room in Private Home**	1.0%	10.8%	1.2%	12.3%	0.7%	11.6%	0.2%	0.4%	1.8%	12.0%
Shared Room/Space in Private Home**	0.5%	0.7%	0.5%	0.6%	0.6%	0.7%	0.0%	0.1%	0.4%	1.4%
Other	1.4%	0.6%	1.8%	0.6%	1.2%	0.6%	0.1%	0.0%	1.3%	0.7%

Note: 2025 and 2026 figures are preliminary.

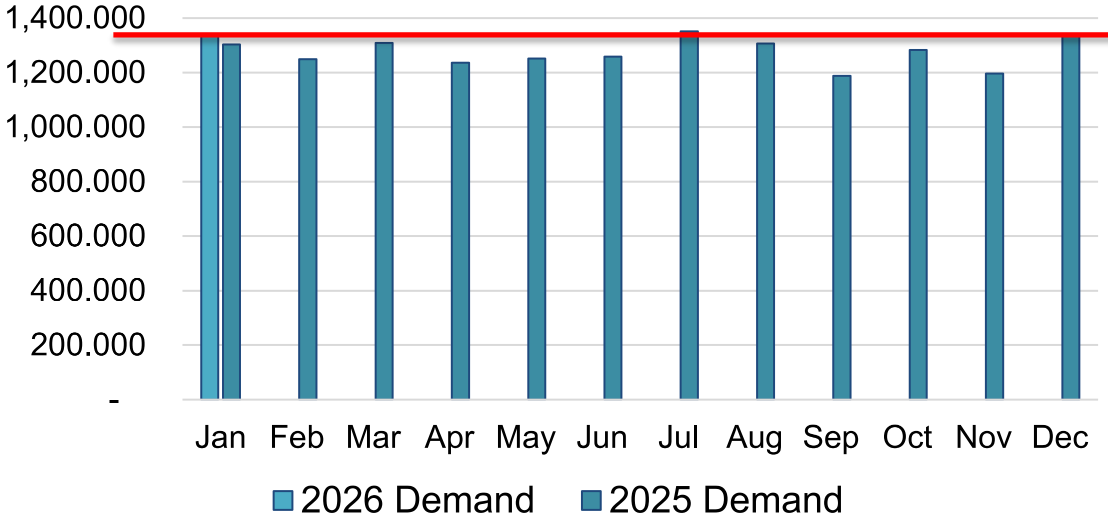
January 2026 Highlights - Lodging

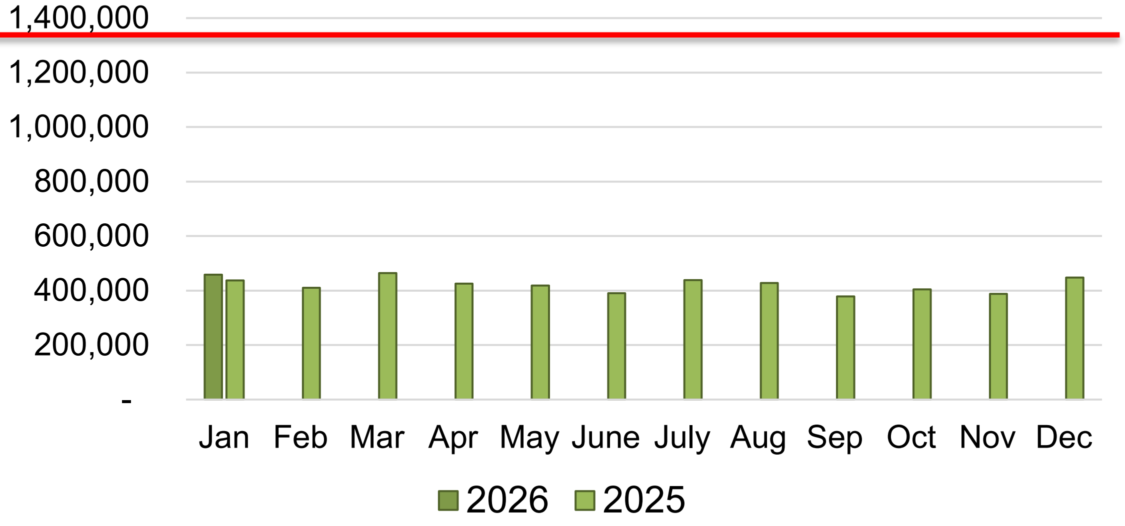
State of Hawai‘i Hotel Performance

	2026	2025	Change
Occupancy	75.9%	73.9%	1.9%
ADR	$383	$383	-0.1%
RevPAR	$290	$283	2.5%

State of Hawai‘i Vacation Rental Performance

	2026	2025	Change
Occupancy	56.4%	58.9%	-2.5%
ADR	$534	$569	-6.2%

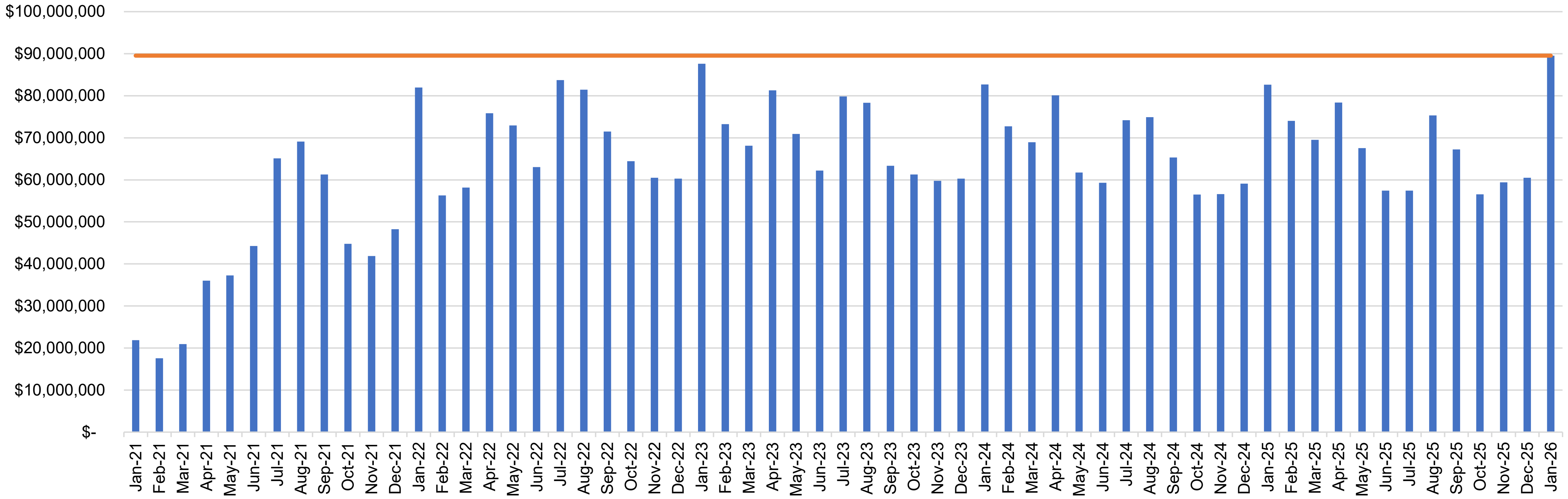

State of Hawai‘i Hotel Demand


State of Hawai‘i Vacation Rental Demand

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism; Lighthouse Intelligence, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

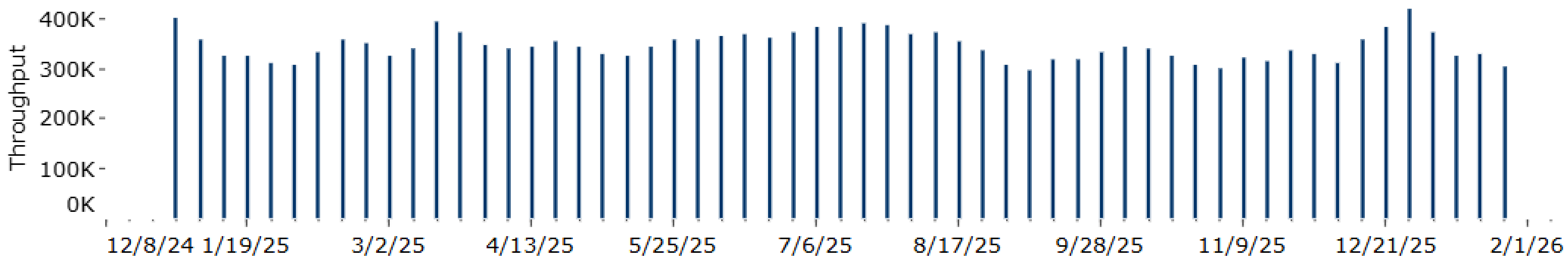
January 2026 Highlights - State TAT Collections

- Preliminary January 2026 TAT Collections: $89.5 million
- Preliminary YTD Fiscal 26 TAT Collections: $466.0 million (-0.7%)
- YTD Fiscal 25 TAT Collections: $469.3 million (-3.3 million)



Source: Department of Taxation

January 2026 Highlights – Hawai‘i Airport Throughput



Throughput by Week

State: Hawaii; Airport: All

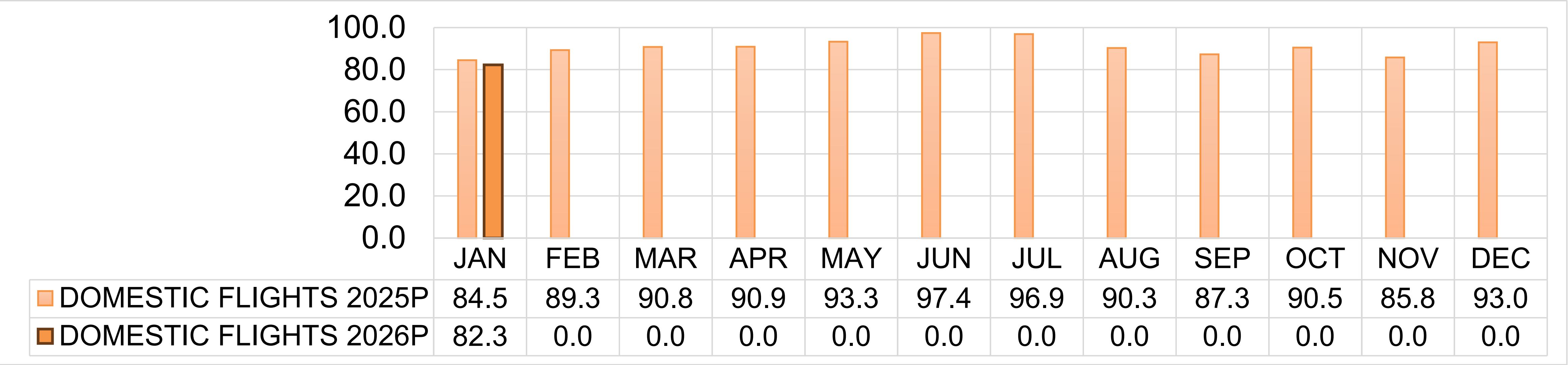
Hawaii Airports

Throughput for the last 6 months, % change compared to 2025

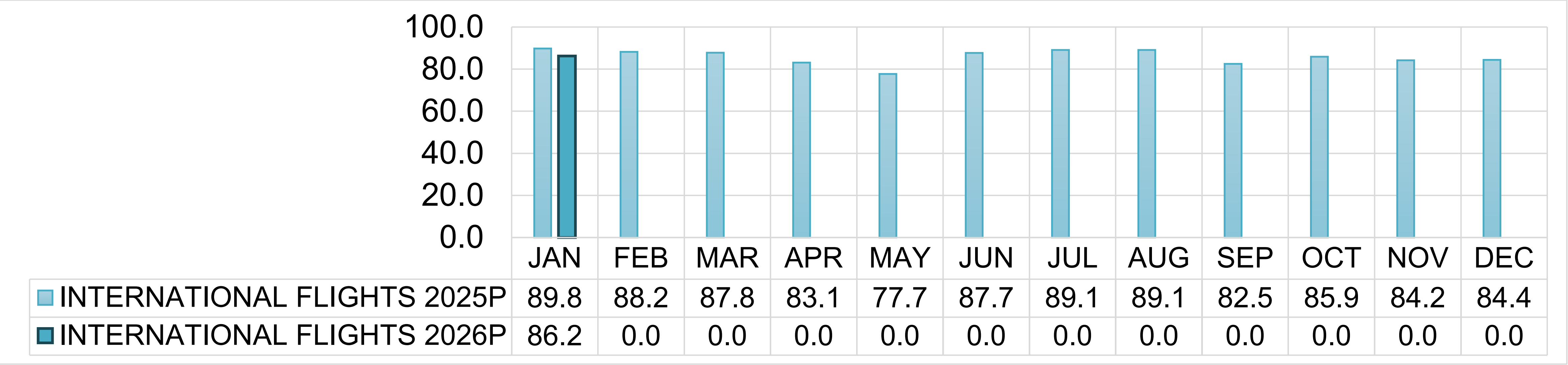
	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
All Airports	1%	0%	3%	0%	2%	1%
Daniel K. Inouye International Airport	0%	0%	2%	1%	2%	0%
Kahului	5%	3%	6%	2%	3%	5%
Ellison Onizuka Kona International Airport	-4%	-5%	-2%	-4%	0%	-2%
Lihue	6%	4%	6%	1%	2%	2%
Hilo International	3%	5%	9%	4%	6%	0%

Source: Transportation Security Administration by Tourism Economics

January 2026 Highlights – Load Factors



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
🟧 DOMESTIC FLIGHTS 2025P	84.5	89.3	90.8	90.9	93.3	97.4	96.9	90.3	87.3	90.5	85.8	93.0
🟧 DOMESTIC FLIGHTS 2026P	82.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
🟦 INTERNATIONAL FLIGHTS 2025P	89.8	88.2	87.8	83.1	77.7	87.7	89.1	89.1	82.5	85.9	84.2	84.4
🟦 INTERNATIONAL FLIGHTS 2026P	86.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: 2025 and 2026 figures are preliminary.

Scheduled Nonstop Seats to Hawaiʻi by Port Entry

January	Total			Domestic			International		
	2026	2025	%CHANGE	2026	2025	%CHANGE	2026	2025	%CHANGE
STATE	1,159,868	1,123,752	3.2	918,177	887,288	3.5	241,691	236,464	2.2
HONOLULU	723,935	717,810	0.9	509,569	506,699	0.6	214,366	211,111	1.5
KAHULUI	219,253	208,040	5.4	201,502	191,491	5.2	17,751	16,549	7.3
KONA	130,102	116,910	11.3	122,964	110,716	11.1	7,138	6,194	15.2
HILO	0	0	0.0	0	0	0.0	0	0	0.0
LIHUʻE	86,578	80,992	6.9	84,142	78,382	7.3	2,436	2,610	-6.7

February	Total			Domestic			International		
	2026	2025	%CHANGE	2026	2025	%CHANGE	2026	2025	%CHANGE
STATE	1,049,357	991,910	5.8	841,869	785,585	7.2	207,488	206,325	0.6
HONOLULU	645,620	633,535	1.9	463,646	451,370	2.7	181,974	182,165	-0.1
KAHULUI	206,546	185,572	11.3	189,796	170,400	11.4	16,750	15,172	10.4
KONA	118,072	101,710	16.1	111,744	95,332	17.2	6,328	6,378	-0.8
HILO	0	0	0.0	0	0	0.0	0	0	0.0
LIHUʻE	79,119	71,093	11.3	76,683	68,483	12.0	2,436	2,610	-6.7

Source: DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of February 24, 2026, subject to change

Scheduled Nonstop Seats to Hawai‘i by Port Entry (continued)

March	Total			Domestic			International		
	2026	2025	%CHANGE	2026	2025	%CHANGE	2026	2025	%CHANGE
STATE	1,248,199	1,194,289	4.5	1,015,230	962,102	5.5	232,969	232,187	0.3
HONOLULU	758,551	758,716	0.0	553,444	554,845	-0.3	205,107	203,871	0.6
KAHULUI	256,306	237,482	7.9	238,297	219,889	8.4	18,009	17,593	2.4
KONA	135,105	111,852	20.8	128,384	104,261	23.1	6,721	7,591	-11.5
HILO	0	0	0.0	0	0	0.0	0	0	0.0
LIHU‘E	98,237	86,239	13.9	95,105	83,107	14.4	3,132	3,132	0.0

April	Total			Domestic			International		
	2026	2025	%CHANGE	2026	2025	%CHANGE	2026	2025	%CHANGE
STATE	1,152,548	1,080,706	6.6	933,113	859,004	8.6	219,435	221,702	-1.0
HONOLULU	717,591	702,446	2.2	518,276	496,687	4.3	199,315	205,759	-3.1
KAHULUI	226,372	193,645	16.9	212,108	183,727	15.4	14,264	9,918	43.8
KONA	113,624	101,134	12.3	108,986	96,327	13.1	4,638	4,807	-3.5
HILO	175	0	NA	175	0	NA	0	0	0.0
LIHU‘E	94,786	83,481	13.5	93,568	82,263	13.7	1,218	1,218	0.0

Source: DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of February 24, 2026, subject to change

MARKET TRENDS AND INSIGHTS

DBEDT

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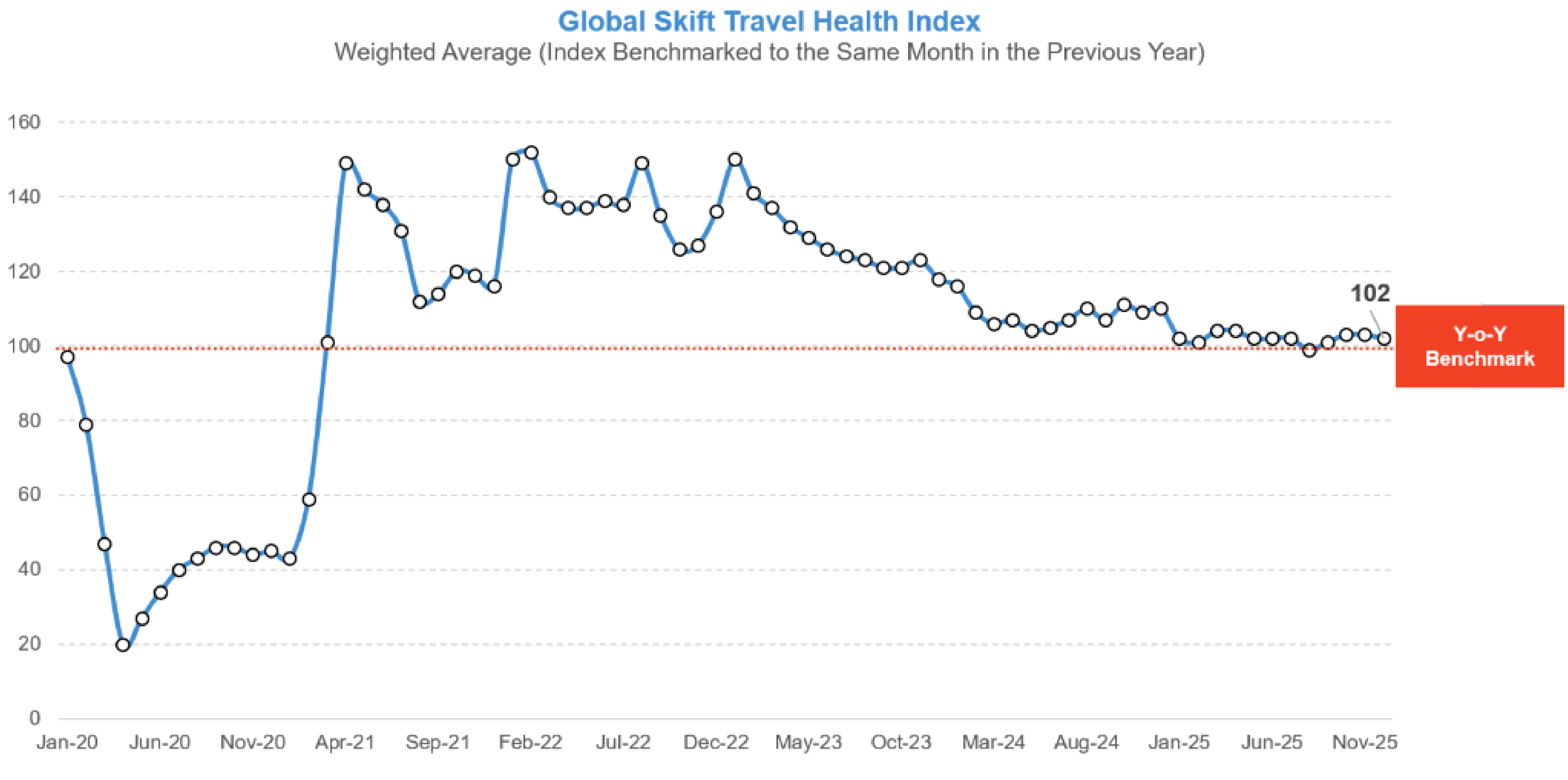
Skift Global Travel Health Index = 102



Global Skift Travel Health Index

Weighted Average (Index Benchmarked to the Same Month in the Previous Year)

Source: Skift Research from partner data, data as of January 2026

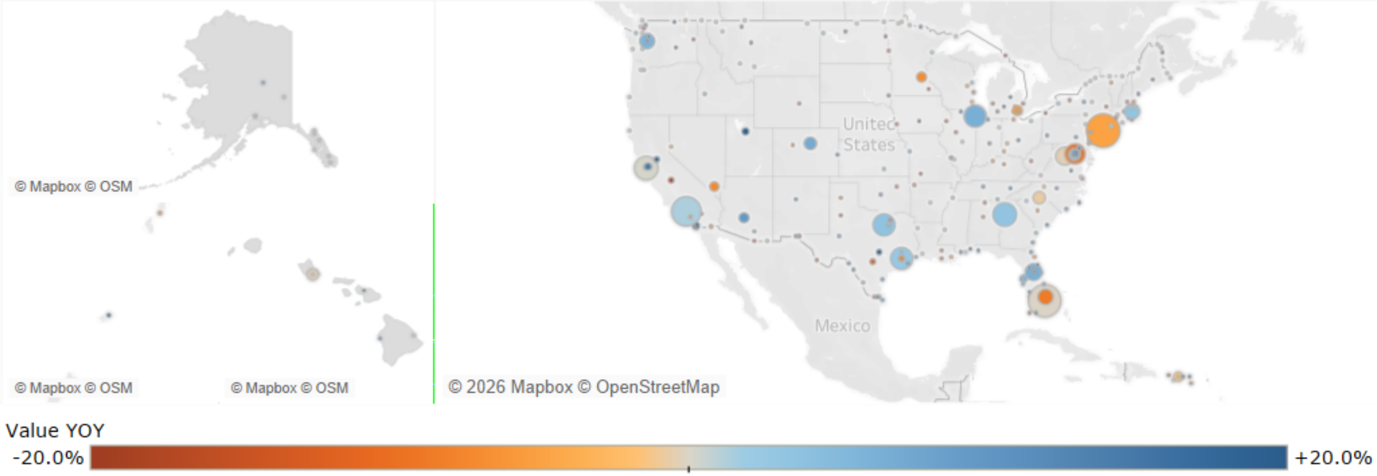
Source: Skift Research

U.S. Customs and Border Protection

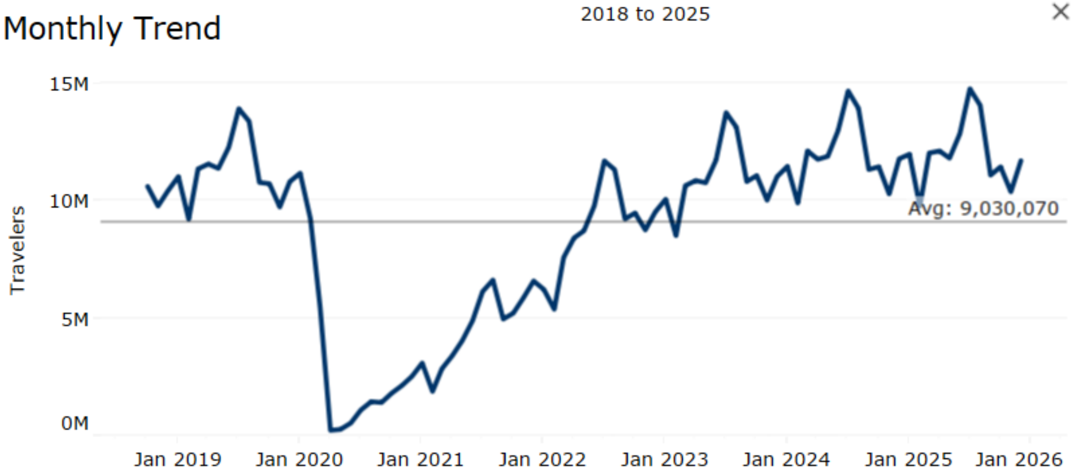
Inbound Travelers | Jan 2026

Start Month	End Month	Summary Dimension	Mode of Transportation	Category	Region	State	Field Office
Jan 2026	Jan 2026	Region	Air	All	All	All	All

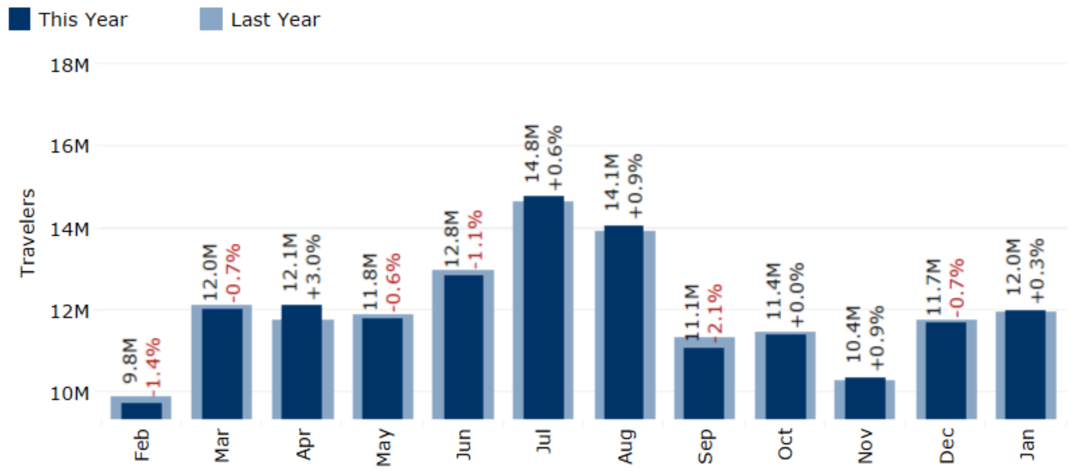
All	Coastal/Interior	Preclearance	Northern Border	Southern Border
12,007,942	9,433,751	1,504,671	886,054	183,466
+0.3%	+0.6%	-5.6%	+2.9%	+34.2%



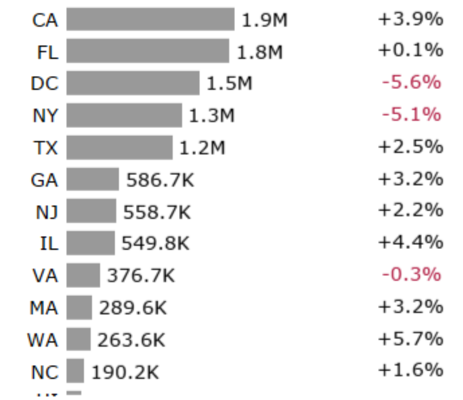
Monthly Trend



Last 12 Months

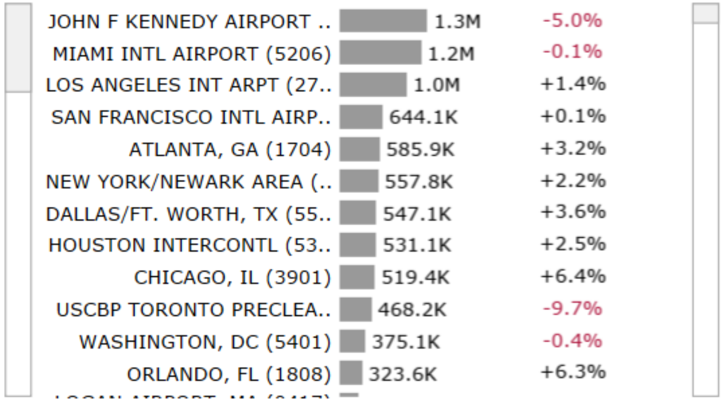


State Rankings



CA	1.9M	+3.9%
FL	1.8M	+0.1%
DC	1.5M	-5.6%
NY	1.3M	-5.1%
TX	1.2M	+2.5%
GA	586.7K	+3.2%
NJ	558.7K	+2.2%
IL	549.8K	+4.4%
VA	376.7K	-0.3%
MA	289.6K	+3.2%
WA	263.6K	+5.7%
NC	190.2K	+1.6%

Port Rankings



JOHN F KENNEDY AIRPORT ..	1.3M	-5.0%
MIAMI INTL AIRPORT (5206)	1.2M	-0.1%
LOS ANGELES INT ARPT (27..	1.0M	+1.4%
SAN FRANCISCO INTL AIRP..	644.1K	+0.1%
ATLANTA, GA (1704)	585.9K	+3.2%
NEW YORK/NEWARK AREA (..	557.8K	+2.2%
DALLAS/FT. WORTH, TX (55..	547.1K	+3.6%
HOUSTON INTERCONTL (53..	531.1K	+2.5%
CHICAGO, IL (3901)	519.4K	+6.4%
USCBP TORONTO PRECLEA..	468.2K	-9.7%
WASHINGTON, DC (5401)	375.1K	-0.4%
ORLANDO, FL (1808)	323.6K	+6.3%

Note: This product uses U.S. Customs and Border Protection data, but is not endorsed by CBP. These statistics represent the inbound travelers that request entry into the U.S. via aircraft, on foot (pedestrians), passenger vehicles, and trucks. This dataset does not represent all conveyances and travelers processed by CBP. This data does not indicate admissibility. See full notes and definitions at https://www.cbp.gov/document/stats/traveler-and-conveyance-statistics

der Protection, Traveler and Conveyance statistics retrieved 2/24/2025

National Travel Indicators

December, 2025

U.S. TRAVEL ASSOCIATION

Compare to Prior Year or 2019
Previous Year

Travel Spending*
(Tourism Economics)

$106.0B

↙ -0.1%
December vs. Previous Year

↗ +0.3%
YTD vs. Previous Year

Air Passengers
(TSA)

0.0%
December vs. Previous Year

↗ +0.3%
YTD vs. Previous Year

Overseas Arrivals
(NTTO)

↙ -1.3%
December vs. Previous Year

↙ -2.5%
YTD vs. Previous Year

Hotel Demand
(STR)

↙ -0.1%
December vs. Previous Year

↙ -0.5%
YTD vs. Previous Year

Short-term Rental Demand
(AIRDNA)

↙ -4.2%
December vs. Previous Year

↗ +3.6%
YTD vs. Previous Year

Insights

Air passenger volume growth was relatively flat in 2025, growing 0.3% year-over-year.

Overseas arrivals declined 2.5% in 2025, delaying the inbound visitor recovery which fell back to 85% of 2019 levels.

Hotel room demand contracted 0.5% in 2025, following nine consecutive months of decline.

Despite ending the year with three consecutive monthly declines, short-term rental demand still grew 3.6% in 2025 compared to the prior year.

Travel Indicators

% change relative to same month vs. Previous Year

Indicators	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Travel Spending (Tourism Economics)	3.4%	2.0%	0.8%	0.3%	0.6%	-0.4%	0.2%	0.2%	-0.7%	0.0%	-1.8%	-0.1%
Air Passengers (TSA)	1.7%	-3.0%	-0.2%	0.2%	-1.5%	-0.4%	1.2%	1.0%	0.7%	3.6%	-0.2%	0.0%
Overseas Arrivals (NTTO)	5.4%	-2.4%	-11.6%	8.0%	-2.8%	-3.4%	-3.1%	-2.9%	-7.7%	-3.1%	-3.5%	-1.3%
Hotel Demand (STR)	1.6%	1.1%	0.3%	-1.3%	0.0%	-1.0%	-0.3%	-0.6%	-1.1%	-1.6%	-2.1%	-0.1%
Top 25 Group Hotel Demand** (STR)	0.0%	4.1%	2.8%	0.1%	-4.5%	-6.4%	-9.3%	-10.9%	-9.0%	-5.5%	-3.5%	-8.5%
Short-term Rental Demand (AIRDNA)	13.3%	6.6%	4.3%	9.8%	6.7%	4.1%	5.2%	4.7%	0.2%	-2.8%	-3.2%	-4.2%
National Park Visits (National Park Service)	6.0%	-4.5%	-3.7%	-0.5%	-1.1%	-6.6%	-0.9%	1.7%	-5.3%	-8.6%	-8.0%	-7.0%

-11.6% 13.3%

---

imates are subject to revision as annual data becomes available
emand at upper-tier hotels (luxury and upper upscale classes)

U.S. Economic Conditions

December, 2025

Compare to
Previous Year

Insights

Economic activity is still rising at a solid pace, but the labor market remains fragile. Firms are still reluctant to fire workers, with the layoff rate at a historical low, but the hiring rate is also close to its lowest level in more than a decade. Meanwhile, inflation has likely peaked, though it will continue to run close to 3% in the near-term. Fading tariff effects and continued housing disinflation underpin the benign outlook.

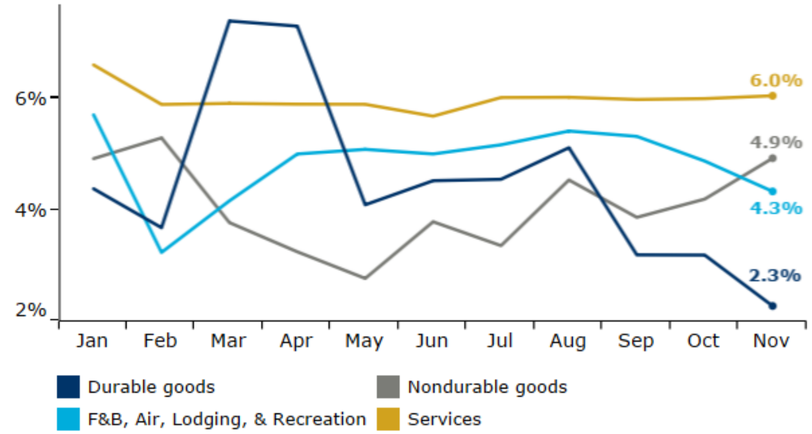
The gains in equity prices have been a powerful driver of consumer spending over the past year, with stock market wealth at a record high relative to household incomes. That boost will linger into 2026, aided by interest rate cuts, loosening bank lending standards, and the package of tax cuts. The consumer outlook remains divided by income level and age, with older, richer households likely to drive a 2.4% rise in consumer spending this year.

Consumer spending will get a boost in Q1 from larger tax refunds, resulting from retroactive individual tax cuts in the OBBBA since the start of 2025. The biggest benefits will go to higher- income households because of the federal increase in the state and local tax deduction. A continued tailwind from rising financial wealth also benefits higher earners the most. Spending by lower- and middle- income households is more sensitive to labor market conditions, and the low hiring rate is adding pressure, particularly on younger consumers. Delinquency rates among the most heavily indebted households could rise as lower-income consumers remain under pressure despite a low unemployment rate. That said, the low level of layoffs, gradually declining inflation, and still-solid wage growth should mean real disposable income growth rises slightly this year.

In addition to robust investment in digital technology such as AI, fading policy uncertainty, the investment incentives under the OBBBA, and the decline in business borrowing costs will support business spending in 2026.

Consumer Spending

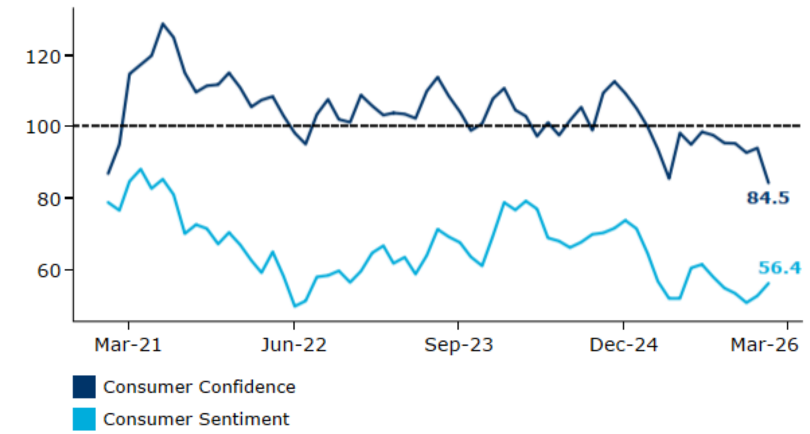
% change relative to same month vs. Previous Year, prior 12-month trend



Source: BEA

Consumer Confidence & Sentiment Index

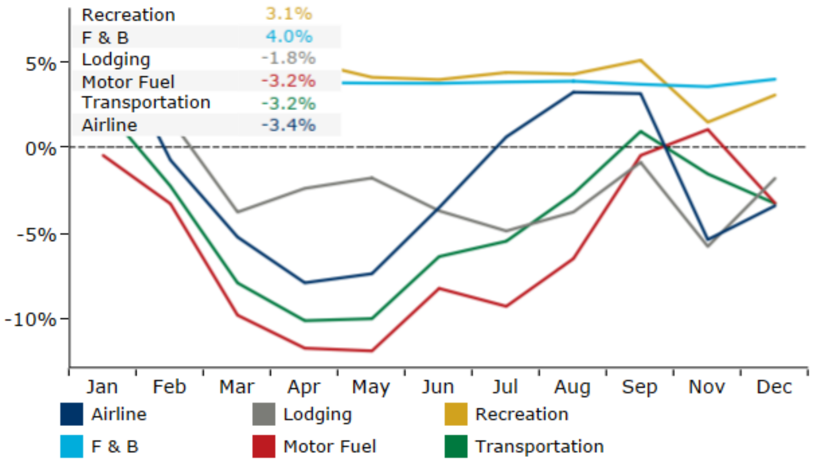
Index, 1985=100, prior 5-years



Source: Conference Board and University of Michigan

Travel Price Index, Major Components

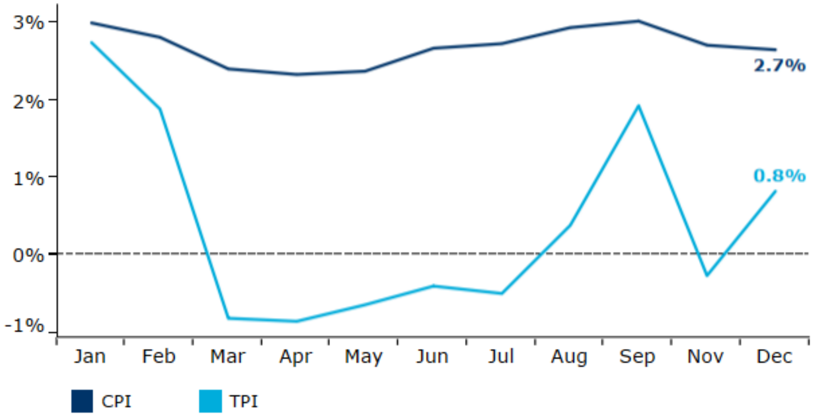
% change relative to same month vs. Previous Year, prior 12-month trend



Source: Tourism Economics

Travel (TPI) and Consumer (CPI) Price Indices

% change relative to same month vs. Previous Year, prior 12-months



Source: BLS (CPI); and Tourism Economics (TPI)

Air Travel

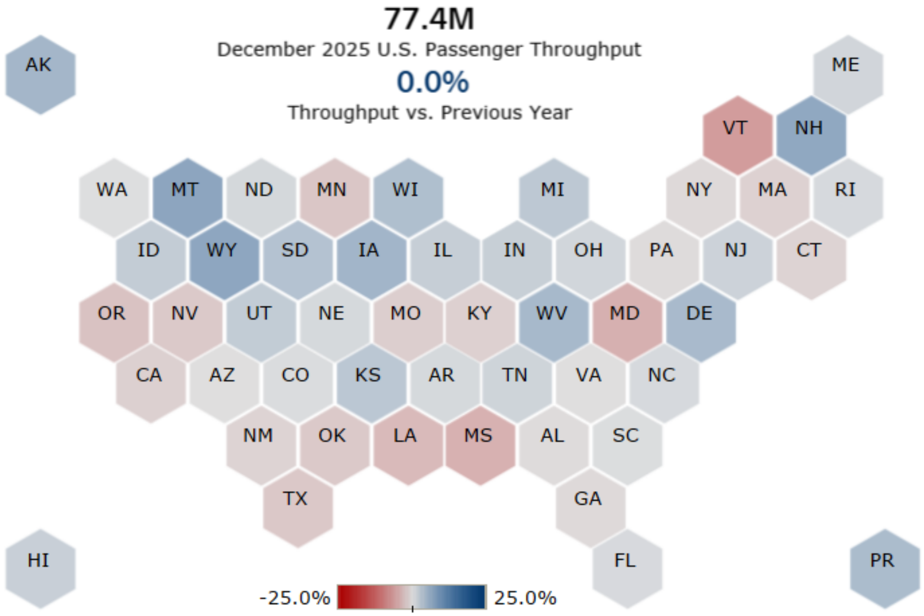
December 2025

U.S. TRAVEL ASSOCIATION

December 2025 Passenger Throughput by State

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

Compare to
Previous Year



77.4M

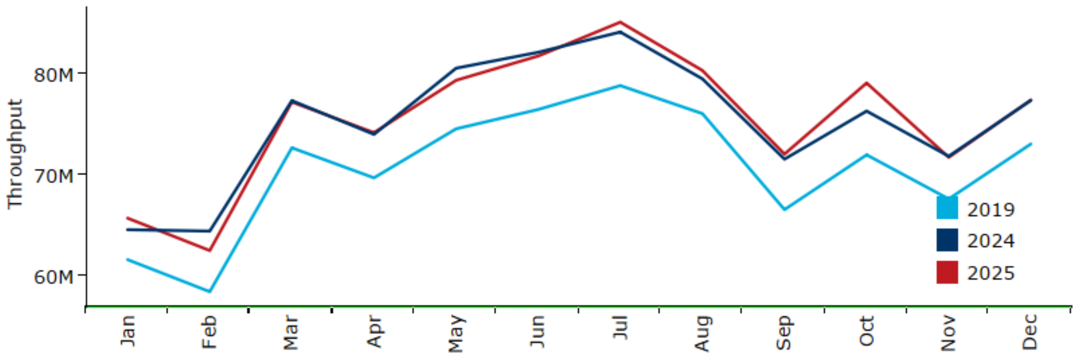
December 2025 U.S. Passenger Throughput

0.0%

Throughput vs. Previous Year

U.S. Monthly Passenger Throughput

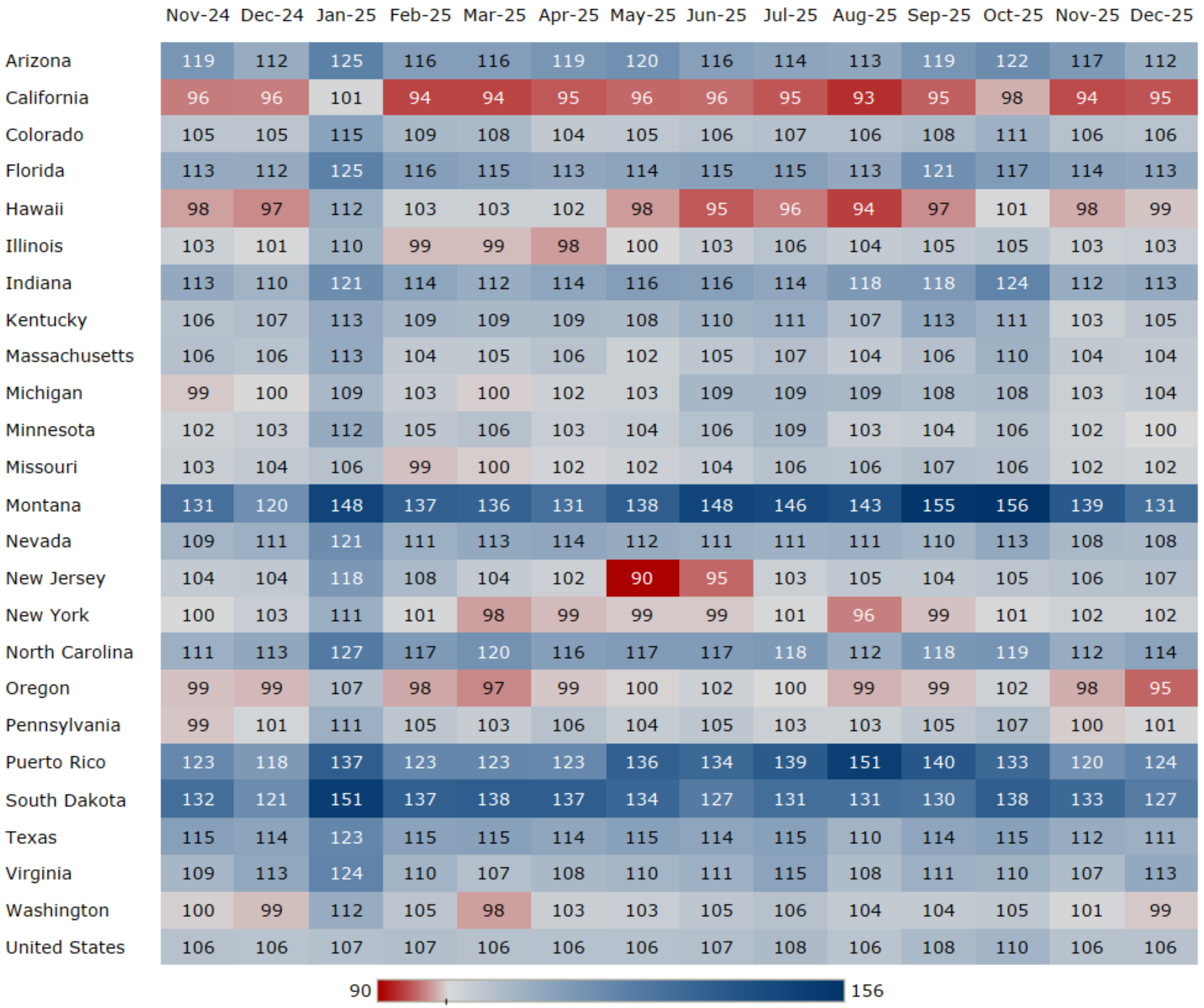
All passengers (domestic + international)



Passenger Throughput Trend Comparison

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

State/Territory Name
Multiple values



	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
Arizona	119	112	125	116	116	119	120	116	114	113	119	122	117	112
California	96	96	101	94	94	95	96	96	95	93	95	98	94	95
Colorado	105	105	115	109	108	104	105	106	107	106	108	111	106	106
Florida	113	112	125	116	115	113	114	115	115	113	121	117	114	113
Hawaii	98	97	112	103	103	102	98	95	96	94	97	101	98	99
Illinois	103	101	110	99	99	98	100	103	106	104	105	105	103	103
Indiana	113	110	121	114	112	114	116	116	114	118	118	124	112	113
Kentucky	106	107	113	109	109	109	108	110	111	107	113	111	103	105
Massachusetts	106	106	113	104	105	106	102	105	107	104	106	110	104	104
Michigan	99	100	109	103	100	102	103	109	109	109	108	108	103	104
Minnesota	102	103	112	105	106	103	104	106	109	103	104	106	102	100
Missouri	103	104	106	99	100	102	102	104	106	106	107	106	102	102
Montana	131	120	148	137	136	131	138	148	146	143	155	156	139	131
Nevada	109	111	121	111	113	114	112	111	111	111	110	113	108	108
New Jersey	104	104	118	108	104	102	90	95	103	105	104	105	106	107
New York	100	103	111	101	98	99	99	99	101	96	99	101	102	102
North Carolina	111	113	127	117	120	116	117	117	118	112	118	119	112	114
Oregon	99	99	107	98	97	99	100	102	100	99	99	102	98	95
Pennsylvania	99	101	111	105	103	106	104	105	103	103	105	107	100	101
Puerto Rico	123	118	137	123	123	123	136	134	139	151	140	133	120	124
South Dakota	132	121	151	137	138	137	134	127	131	131	130	138	133	127
Texas	115	114	123	115	115	114	115	114	115	110	114	115	112	111
Virginia	109	113	124	110	107	108	110	111	115	108	111	110	107	113
Washington	100	99	112	105	98	103	103	105	106	104	104	105	101	99
United States	106	106	107	107	106	106	106	107	108	106	108	110	106	106

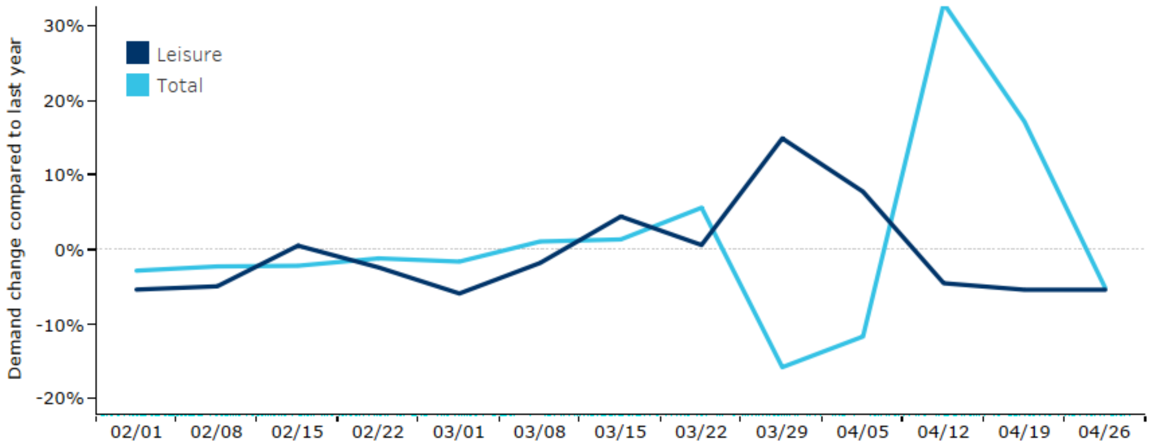
90 156

Domestic Leisure Travel

December, 2025

U.S. Hotel Leisure Demand Pace

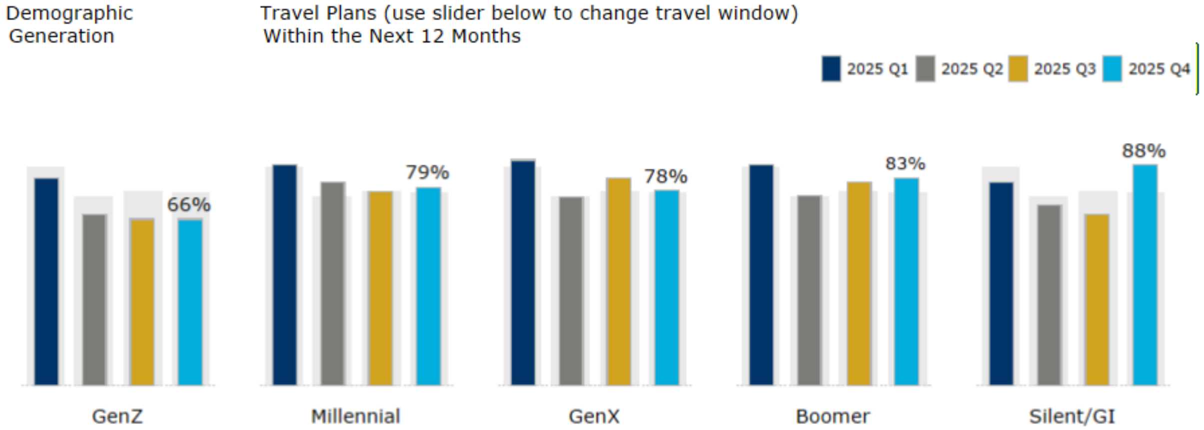
Leisure hotel booking pace vs same time last year, as of 1/20/2026



Source: Amadeus

Planning Leisure Travel Within the Next 12 Months

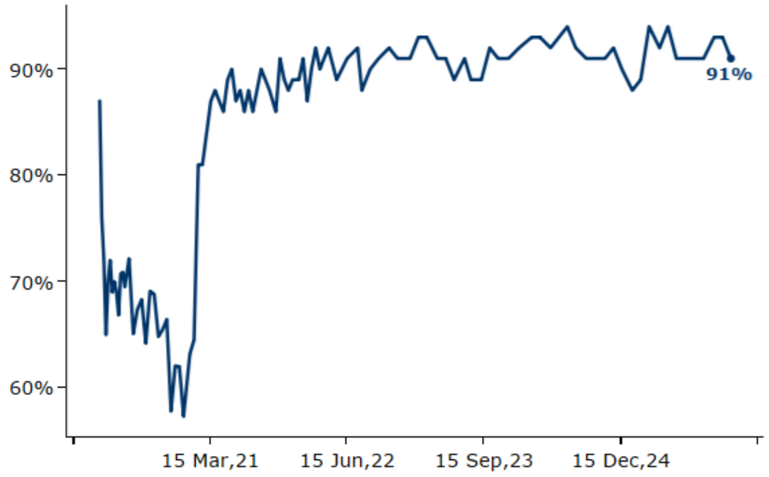
% of American Travelers



Source: MMGY Global's Portrait of American Travelers (released December 2025)

Consumer Travel Sentiment

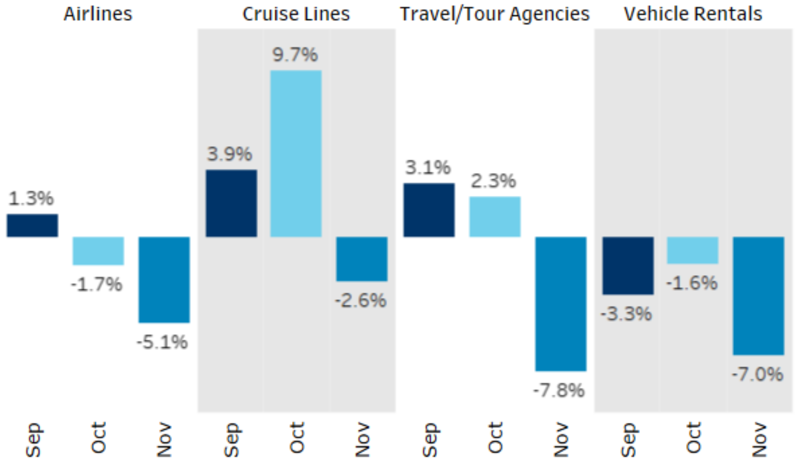
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

US Consumer Credit Card Spend

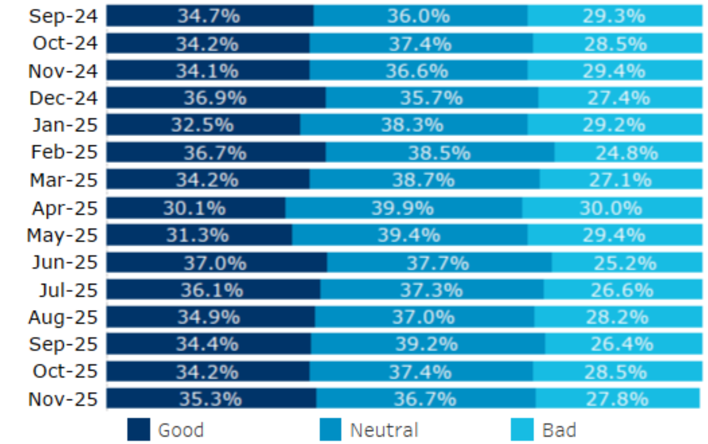
% change YOY



Source: TransUnion

Consumer Travel Sentiment

Do you feel now is a good or bad time for you to spend money on leisur..



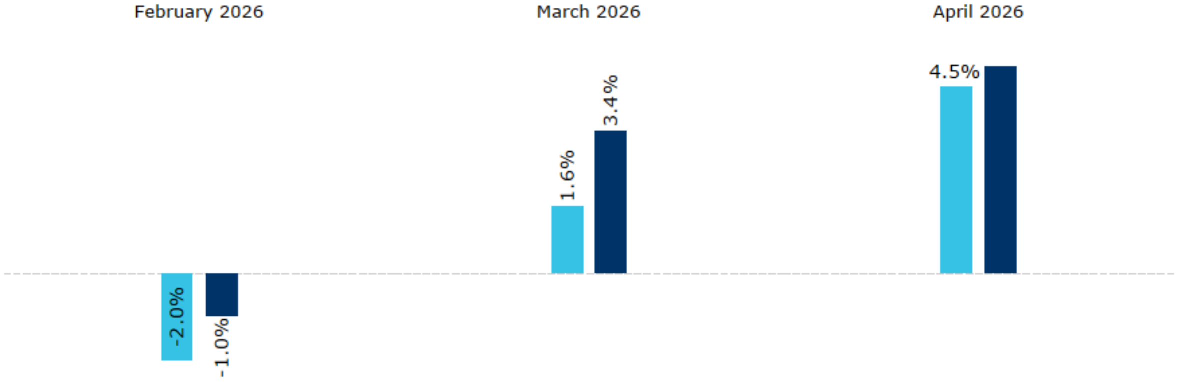
Source: Future Partners

Domestic Business Travel

December, 2025

U.S. Hotel Business Demand Pace

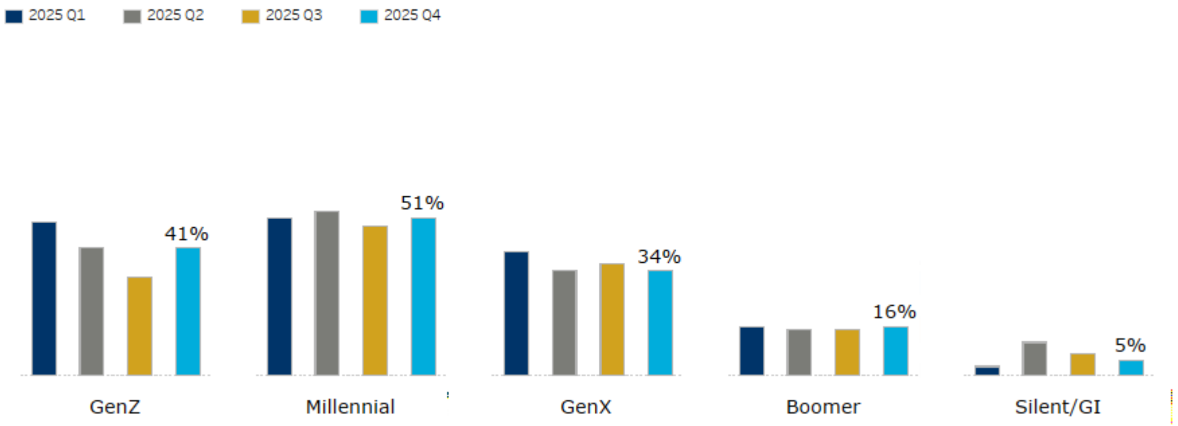
Business hotel booking pace vs same time last year, as of 1/20/2026



Source: Amadeus

Planning Business Travel Within the Next 12 Months

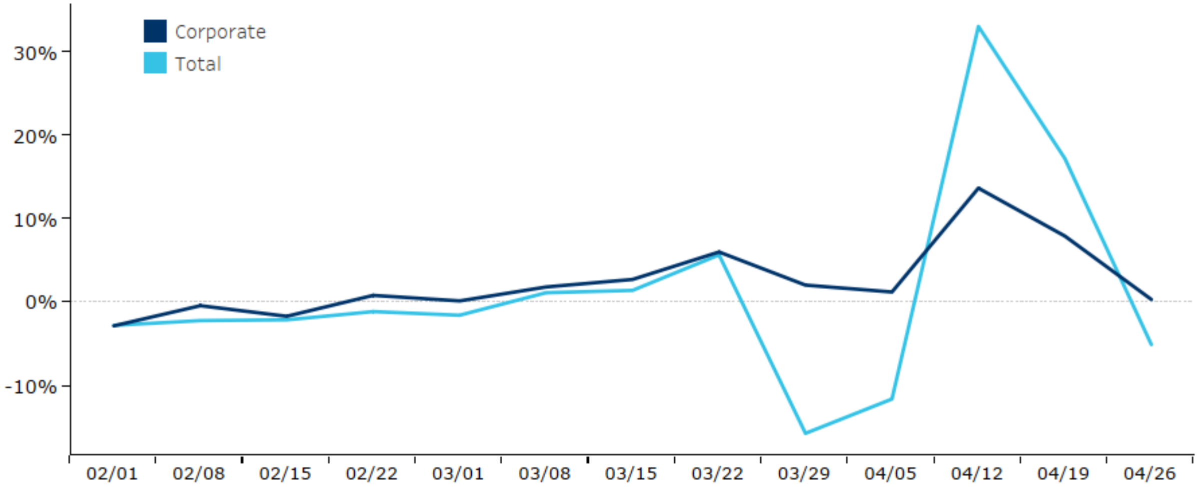
% of American Consumers by Generation



Source: MMGY Global's Portrait of American Travelers (released December 2025)

U.S. Hotel Business Demand Pace

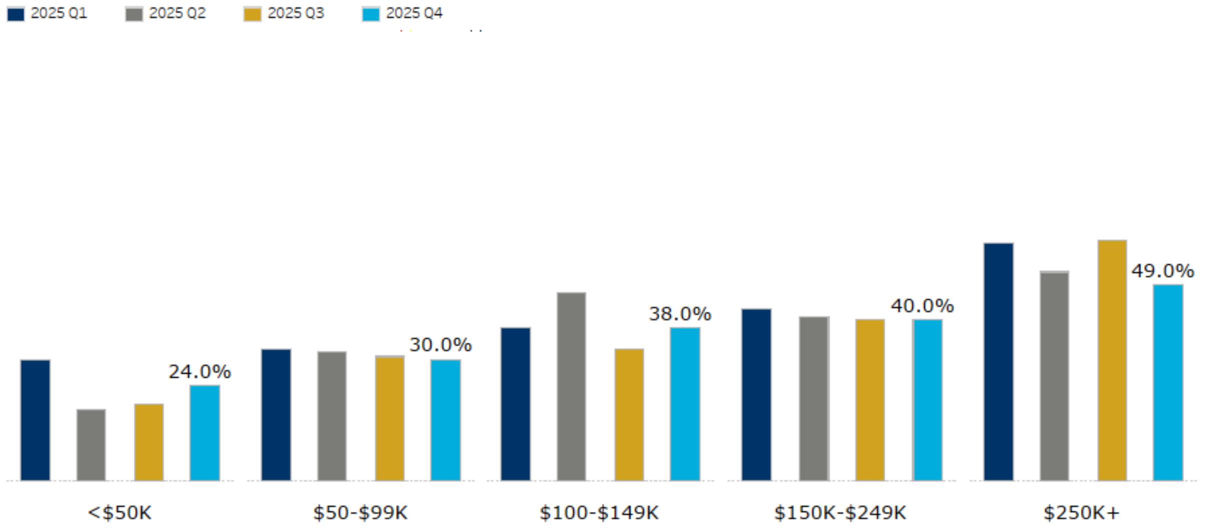
Business hotel booking pace vs same time last year, as of 1/20/2026



Source: Amadeus

Planning Business Travel Within the Next 12 Months

% of American Consumers by Household Income



Domestic Group Travel

December, 2025

Insights

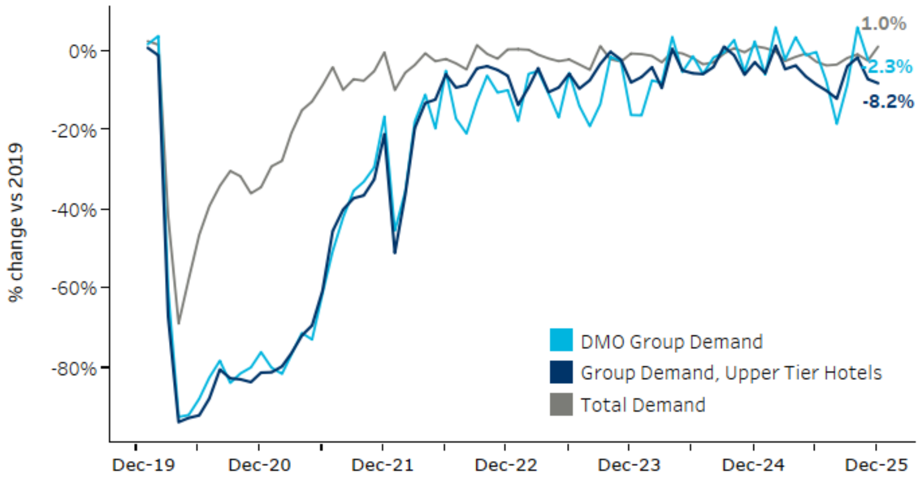
DMO group demand weakened in November, falling to 2.3% below 2019 levels, compared to 5.9% above 2019 levels in October.

DMO/CVB pace for room nights on the books as of December fell slightly compared to November's readings for the first quarter of 2026.

The level of meeting planner optimism over the outlook improved in December as 48% were more optimistic about the outlook compared to 31% in September.

Total U.S. Hotel Demand vs Group Demand

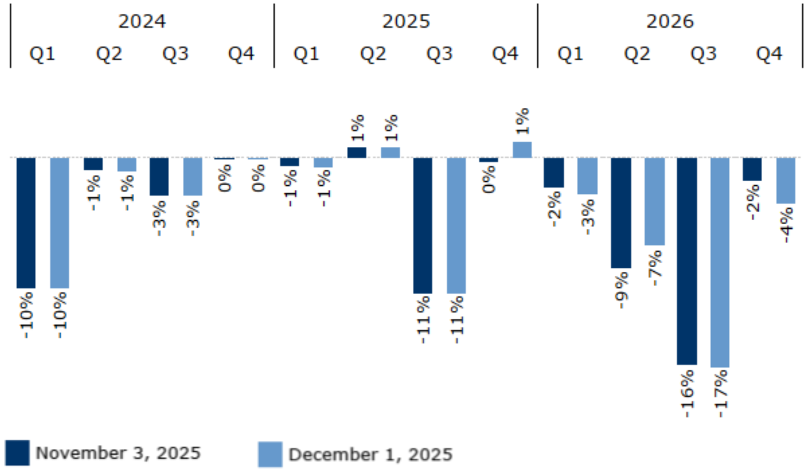
Group demand, % change vs 2019



Source: STR (total demand and top-tier group demand), Simpleview CRM (250+ U.S. DMOs)

DMO/CVB Room Nights on the Books

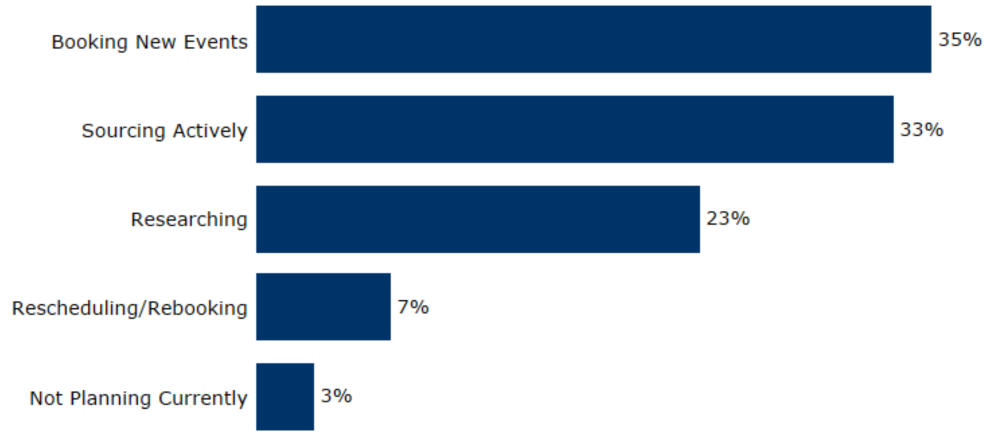
Pace for future dates, relative to the same period in 2019



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

Sourcing of Meeting & Event Venues

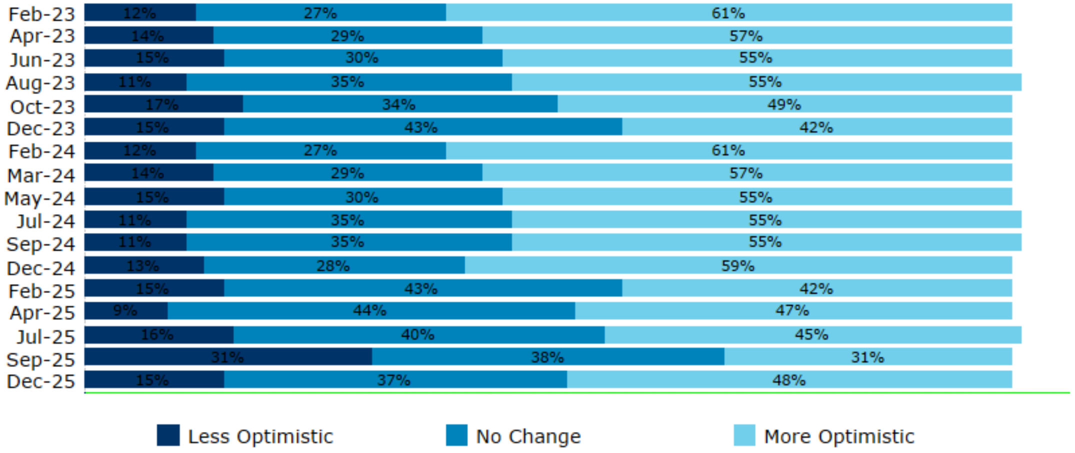
What is your current primary focus as it pertains to your live, in-person events?



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of December 2025

Meeting Planner Outlook

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



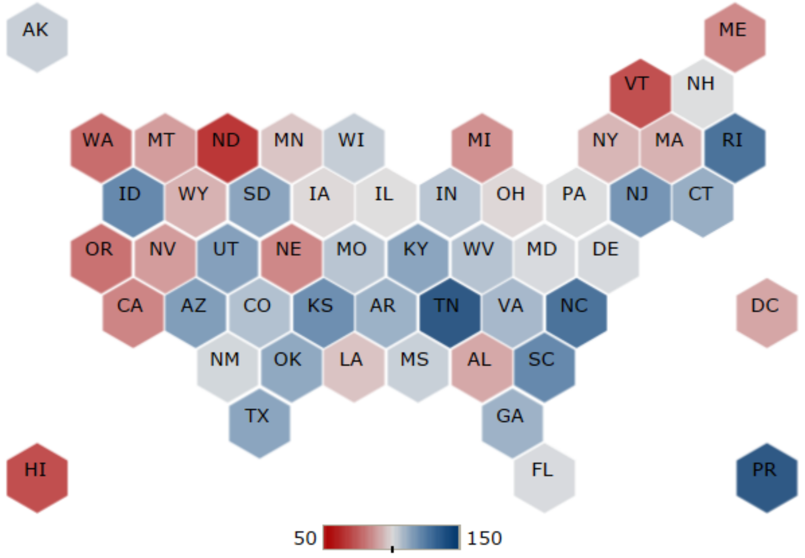
Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of December 2025

International Inbound Travel

December 2025

Overseas Arrivals to U.S. by State (+PR)

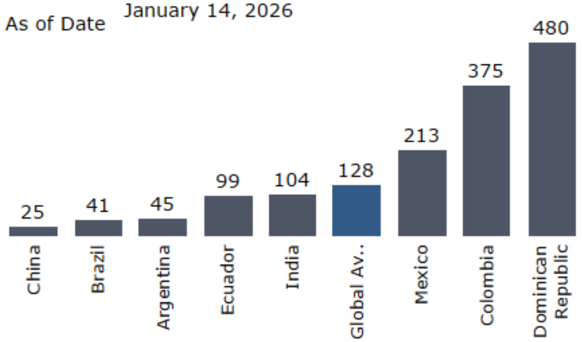
Visitor arrivals for December 2025, Index (2019 = 100), based on first intended address



Next Available Visa Appointment

Avg. Days

As of Date January 14, 2026

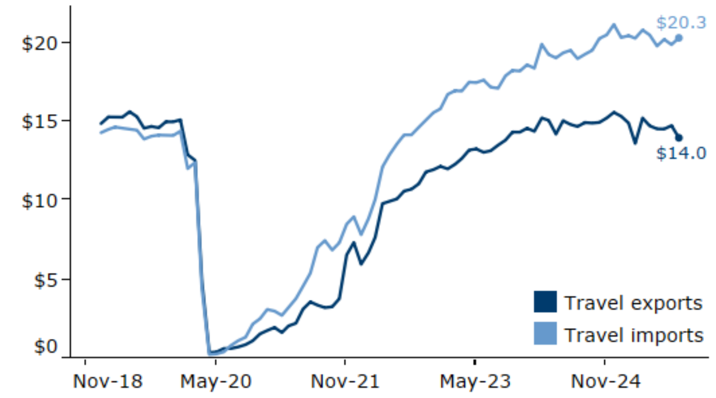


Top-8 inbound markets for tourist visa required countries. Weighted average by 2019 consulate visa issuance. Global Average includes China

Source: Tourism Economics

Nominal US Export and Imports

in billions

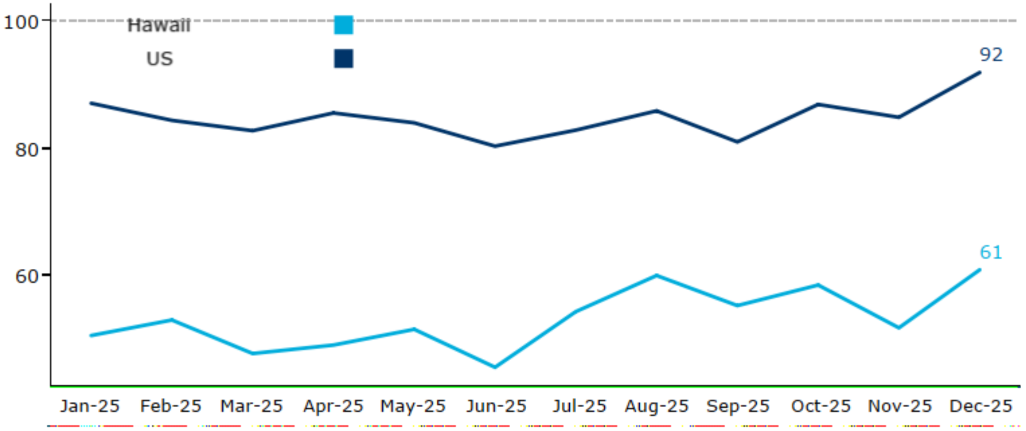


Source: NTTO

Overseas Arrivals to U.S. Total & Hawaii

State Hawaii

Visitor arrivals to U.S. Total & Hawaii, (Index 2019 = 100),based on first intended address

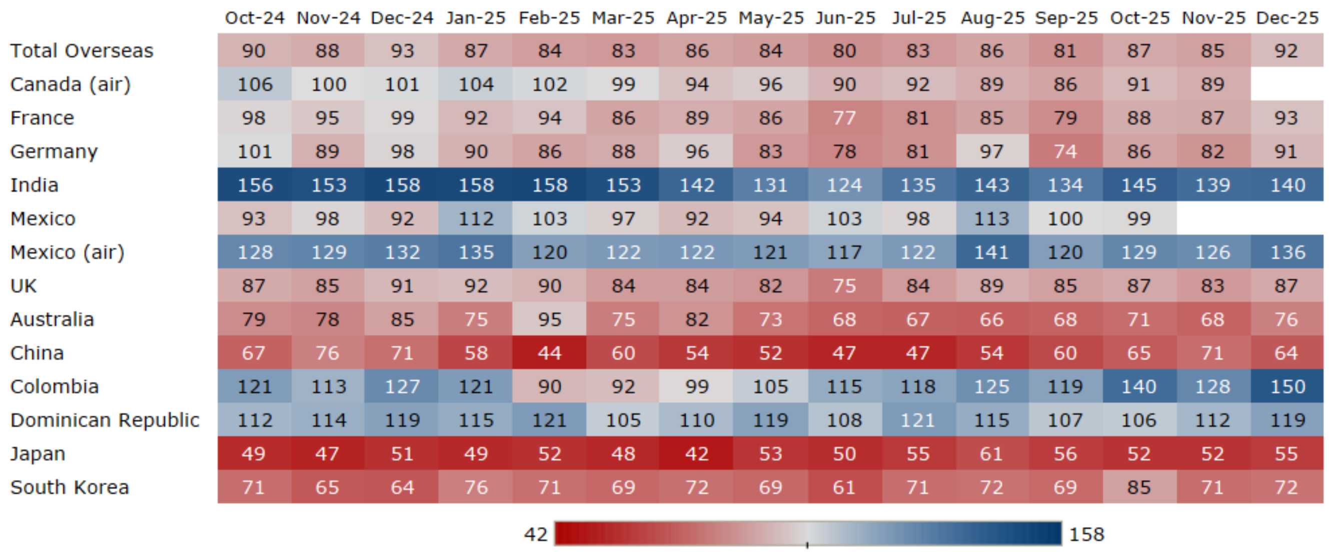


Destination U.S. Total

Origin Multiple values

International Arrivals to U.S. Total

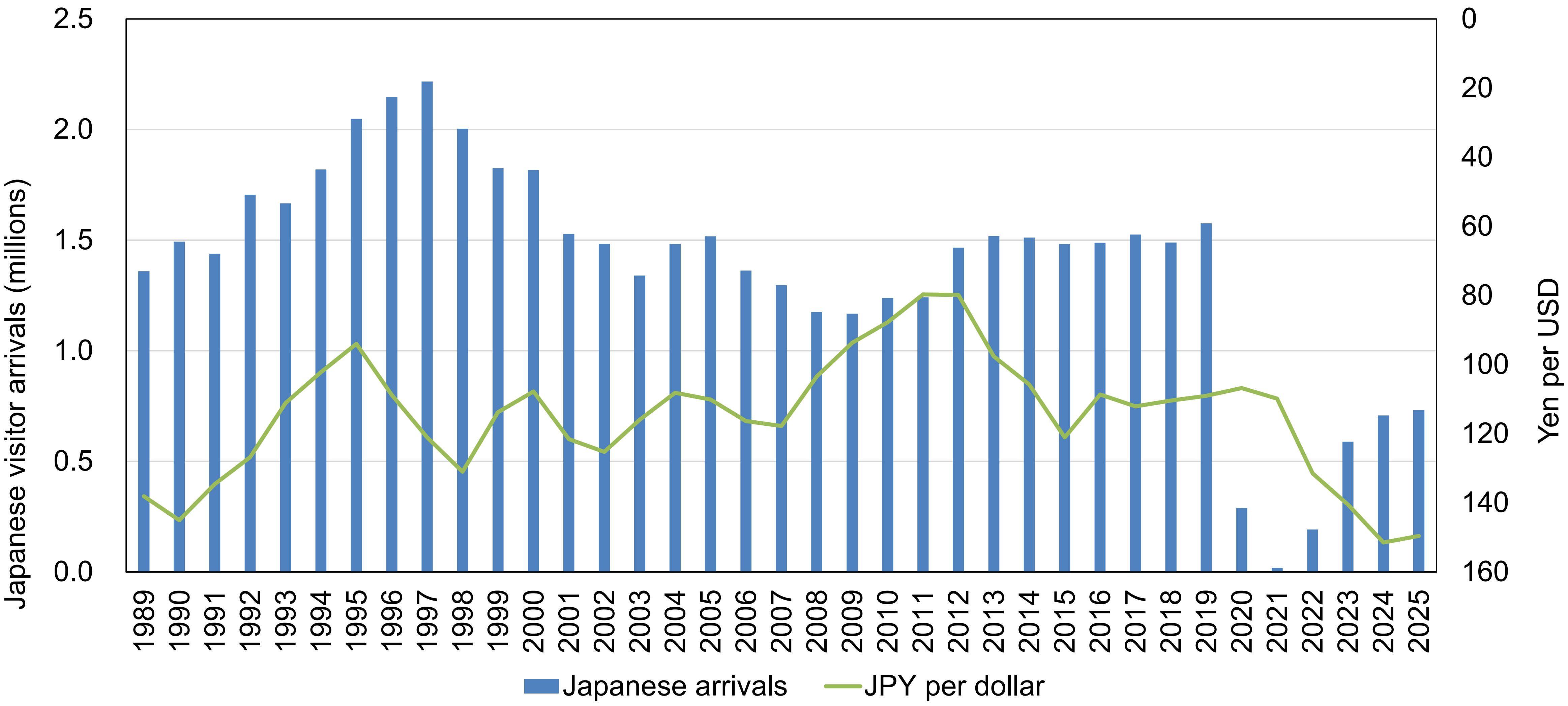
Visitor arrivals to U.S. Total, (Index 2019 = 100), based on first intended address



	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
Total Overseas	90	88	93	87	84	83	86	84	80	83	86	81	87	85	92
Canada (air)	106	100	101	104	102	99	94	96	90	92	89	86	91	89	
France	98	95	99	92	94	86	89	86	77	81	85	79	88	87	93
Germany	101	89	98	90	86	88	96	83	78	81	97	74	86	82	91
India	156	153	158	158	158	153	142	131	124	135	143	134	145	139	140
Mexico	93	98	92	112	103	97	92	94	103	98	113	100	99		
Mexico (air)	128	129	132	135	120	122	122	121	117	122	141	120	129	126	136
UK	87	85	91	92	90	84	84	82	75	84	89	85	87	83	87
Australia	79	78	85	75	95	75	82	73	68	67	66	68	71	68	76
China	67	76	71	58	44	60	54	52	47	47	54	60	65	71	64
Colombia	121	113	127	121	90	92	99	105	115	118	125	119	140	128	150
Dominican Republic	112	114	119	115	121	105	110	119	108	121	115	107	106	112	119
Japan	49	47	51	49	52	48	42	53	50	55	61	56	52	52	55
South Korea	71	65	64	76	71	69	72	69	61	71	72	69	85	71	72

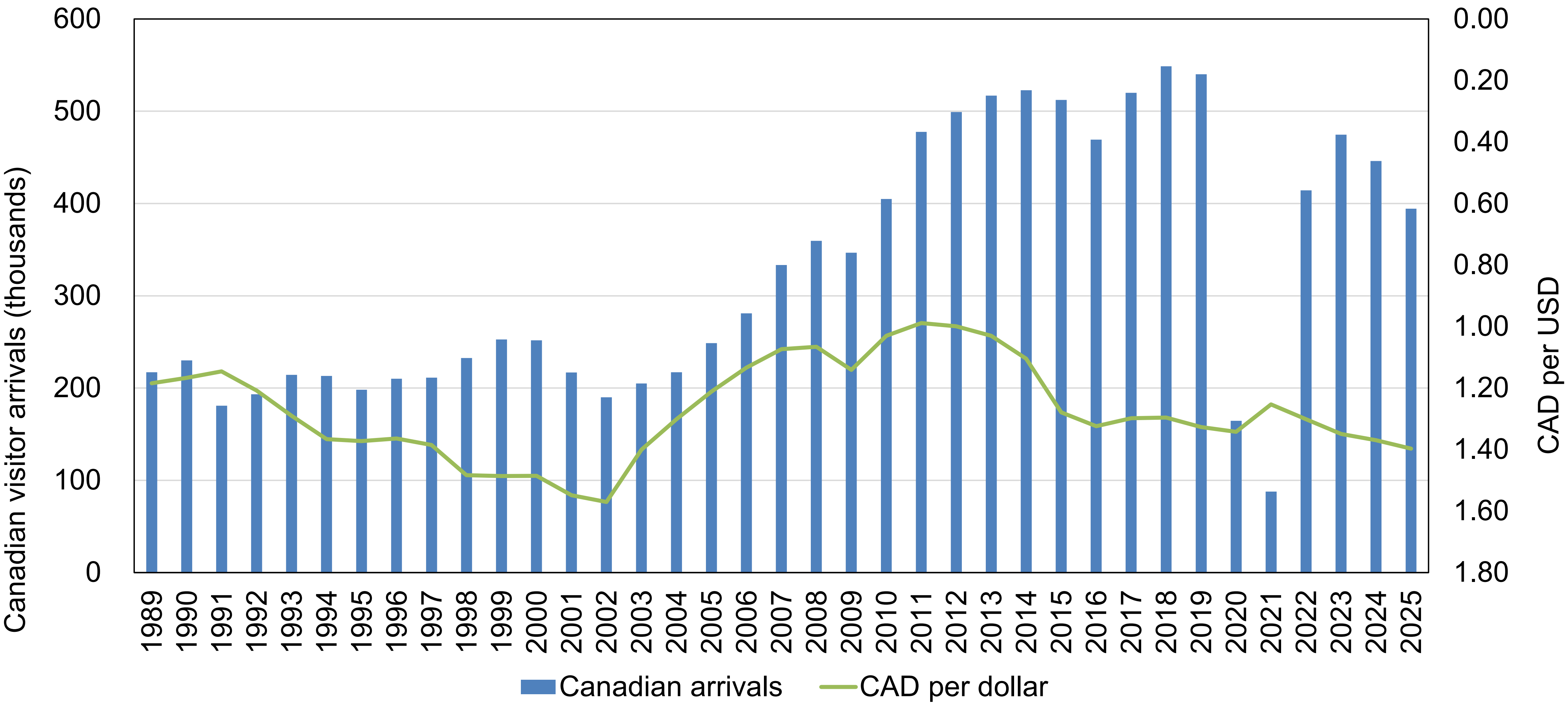
less otherwise noted)

Japanese Yen to $USD vs. Visitor Arrivals to Hawai‘i



Source: DBEDT, Federal Reserve Bank of St. Louis

Canadian Dollar to $USD vs. Visitor Arrivals to Hawaiʻi



Source: DBEDT, Federal Reserve Bank of St. Louis

STR Hotel Performance Forecast

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

HAWAIʻI TOURISM
AUTHORITY

State of Hawai‘i Hotel Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	73.3%	-1.2%	▼	$363.57	-3.0%	▼	$266.51	-4.5%	▼
2025	73.8%	0.5%	▲	$366.30	0.8%	▲	$270.46	1.5%	▲
2026F	73.8%	0.0%	▼	$366.81	0.1%	▲	$270.70	0.1%	▲
2027F	74.2%	0.4%	▲	$370.52	1.0%	▲	$274.87	1.5%	▲

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

O‘ahu Hotel Forecast

	Occupancy			**ADR**			**RevPAR**		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	79.8%	0.1%	▲	$283.32	1.0%	▲	$226.18	1.2%	▲
2025	78.6%	-1.2%	▼	$284.12	0.3%	▲	$223.33	-1.3%	▼
2026F	78.6%	0.0%	▼	$285.57	0.5%	▲	$224.42	0.5%	▲
2027F	78.9%	0.3%	▲	$289.51	1.4%	▲	$228.48	1.8%	▲

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

Maui County Hotel Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	61.6%	-4.0%	▼	$549.94	-7.2%	▼	$338.52	-13.0%	▼
2025	64.5%	2.9%	▲	$536.80	-2.4%	▼	$345.95	2.2%	▲
2026F	64.5%	0.1%	▲	$527.43	-1.7%	▼	$340.31	-1.6%	▼
2027F	64.9%	0.3%	▲	$528.58	0.2%	▲	$342.82	0.7%	▲

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

Hawaiʻi Island Hotel Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	66.7%	-2.5%	▼	$424.31	1.2%	▲	$282.88	-2.4%	▼
2025	69.3%	2.7%	▲	$439.31	3.5%	▲	$304.52	7.6%	▲
2026F	69.2%	-0.1%	▼	$449.55	2.3%	▲	$311.02	2.1%	▲
2027F	69.7%	0.5%	▲	$452.16	0.6%	▲	$315.25	1.4%	▲

Source: STR, Inc. © Copyright 2026 State of Hawaiʻi Department of Business, Economic Development & Tourism

Kaua‘i Hotel Forecast

	Occupancy			ADR			RevPAR		
Year	%	Pct Point Change		$	% Change		$	% Change	
2024	73.0%	-1.0%	▼	$413.02	0.2%	▲	$301.46	-1.2%	▼
2025	75.4%	2.4%	▲	$416.44	0.8%	▲	$313.78	4.1%	▲
2026F	75.0%	-0.4%	▼	$422.12	1.4%	▲	$316.40	0.8%	▲
2027F	75.4%	0.4%	▲	$432.20	2.4%	▲	$325.75	3.0%	▲

Source: STR, Inc. © Copyright 2026 State of Hawai‘i Department of Business, Economic Development & Tourism

DBEDT

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

Vision Insights Traveler Profiles

VISION INSIGHTS

VISION INSIGHTS

Vision Insights
U.S. Traveler Profiles
2025

February 26, 2026

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

HAWAIʻI TOURISM AUTHORITY

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 selected traveler profile segments for the U.S., Japan, Canada, Australia, and Korea

Segment Definitions

Avid Traveler $100k+

- Gross household income is $100k+
- Age is 25-54
- Either
  - Takes international vacations
  - Likely/very likely to book an air trip in the next 12 months
  - Visited Hawai‘i or Alaska in the last 12 months
  - Next leisure destination is most likely to be Hawai‘i or Alaska

Long-Distance Air Traveler under 55

- Takes international vacations
- State of residence is not Hawai‘i
- Age 18-54

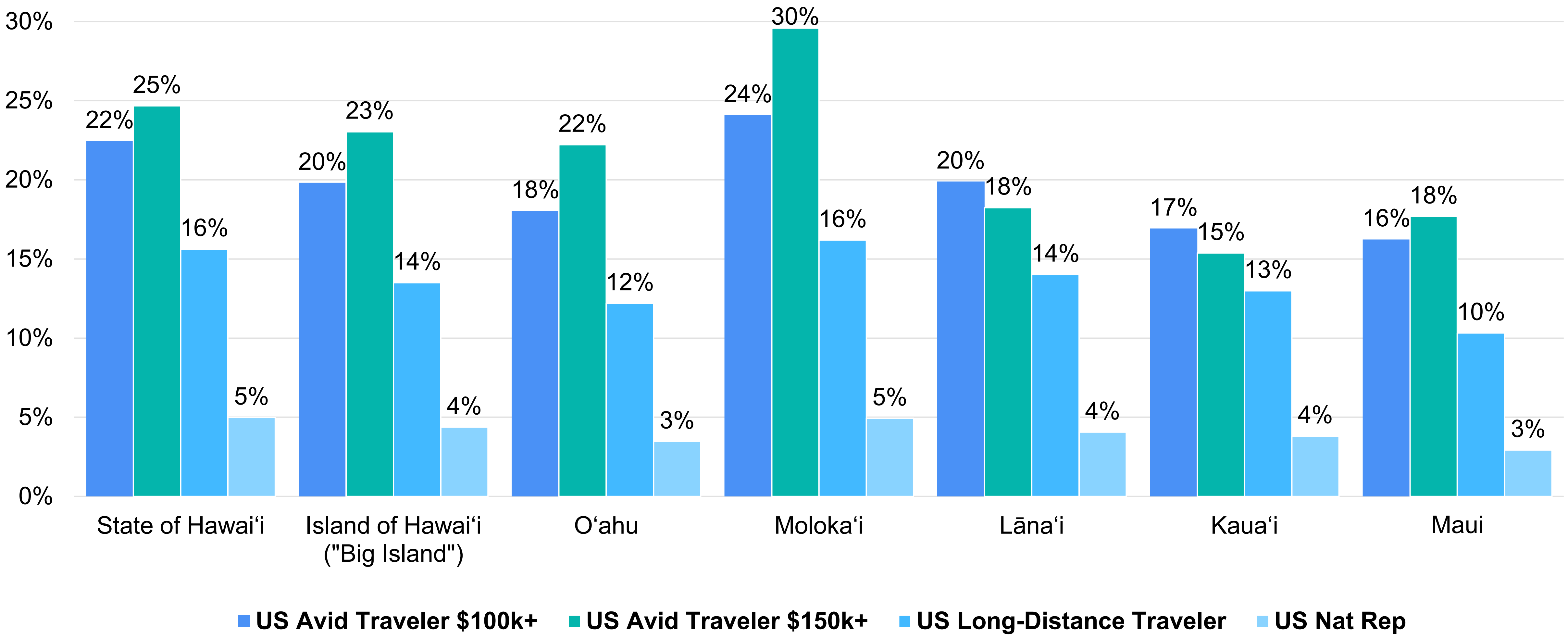
Avid Traveler $150k+

- Gross household income is $150k+
- Age is 25-54
- Either
  - Married/domestic partner and have no children
  - Married/domestic partner and have 1+ children under 18
  - Have 1+ children under 18
- Either
  - Takes international vacations
  - Likely/very likely to book an air trip in the next 12 months
  - Visited Hawai‘i or Alaska in the last 12 months
  - Next leisure destination is most likely to be Hawai‘i or Alaska

Nationally Representative Sample (Nat Rep)

- Representative of U.S. adults in terms of age, gender, social class and education

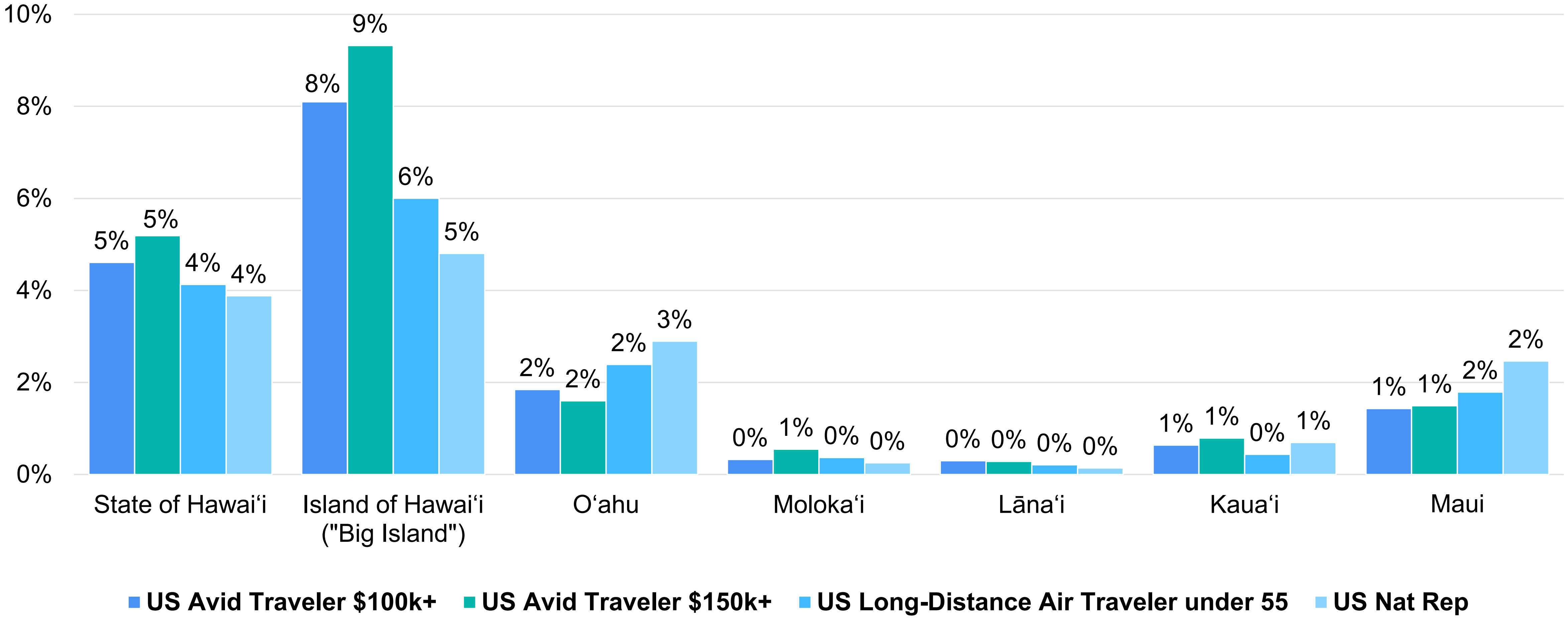
U.S. - Leisure Trip In Past 12 Months



Sample Min. n=50

Note: US Avid Traveler $100k+, US Avid Traveler $150k+, and US Long-Distance Traveler sample size is too small for select islands

U.S. – Next Destination for Leisure Trip



Sample Min. n=75

And, to which of the following destinations are you MOST LIKELY to go? (Amongst destinations Considered)

Top 10 States of Residence by Segment

US Avid Traveler
$100K
25-54

	%
New York	20.9%
California	15.0%
Texas	8.6%
Florida	7.5%
Illinois	4.3%
Georgia	4.2%
Pennsylvania	3.8%
Washington	2.9%
New Jersey	2.7%
Massachusetts	2.7%

US Avid Traveler
$150K
25-54, 2+ household

	%
New York	23.2%
California	17.1%
Texas	7.7%
Florida	7.3%
Illinois	5.8%
Georgia	4.3%
Massachusetts	3.5%
Pennsylvania	3.3%
Washington	3.2%
New Jersey	2.9%

US Long-Distance Air Traveler
Under 55

	%
New York	14.4%
California	10.0%
Texas	8.9%
Florida	8.6%
Georgia	5.3%
Pennsylvania	3.9%
Illinois	3.7%
North Carolina	3.3%
New Jersey	3.2%
Virginia	2.9%

US Nat Rep

	%
New York	9.0%
Florida	8.8%
Texas	7.8%
California	6.7%
Pennsylvania	5.2%
Georgia	4.4%
Ohio	4.1%
North Carolina	4.0%
Illinois	3.7%
Michigan	3.4%

Sample Size:	n=2,636	n=1,109	n=5,590	n=22,575

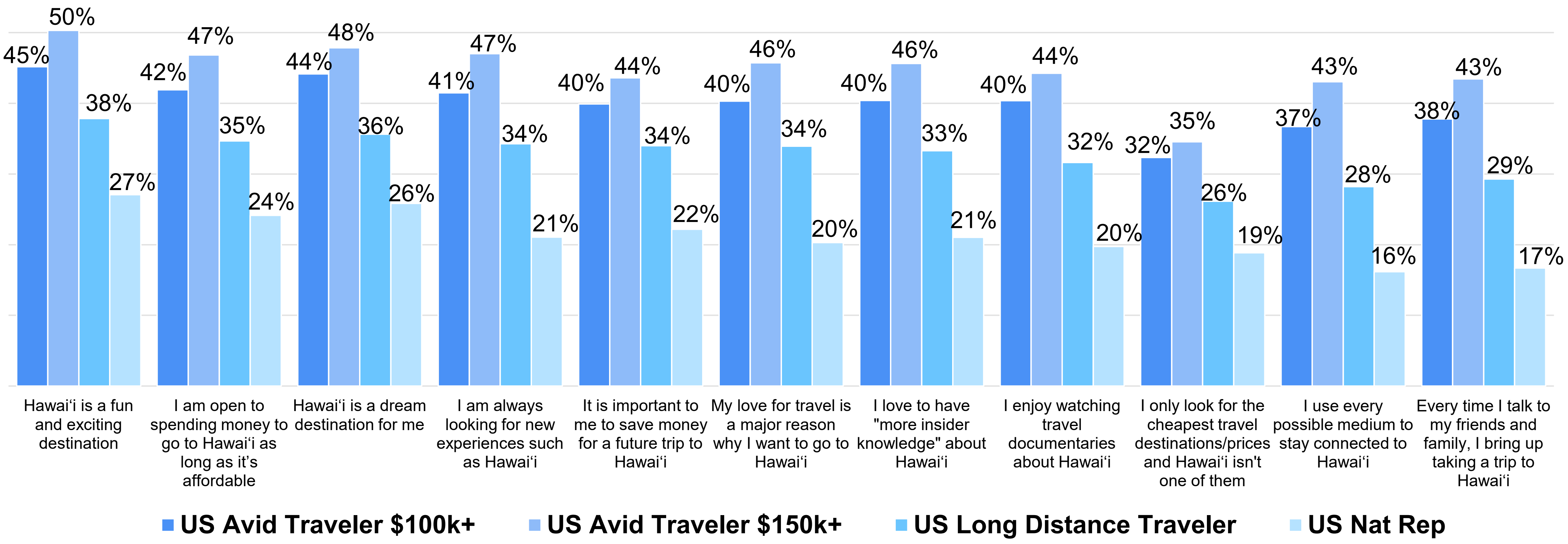
U.S. - Importance of Travel Factors

	Very Important 5			
	US: Avid Traveler $100k+	US: Avid Traveler $150k+	US: Long-Distance Air Traveler under 55	US Market
Comfort and accessibility	54%	57%	51%	51%
Value for money	52%	54%	51%	55%
Entertainment and nightlife	44%	48%	40%	29%
Consideration of sustainable principles	42%	46%	38%	28%
Natural attractions/activities	50%	52%	47%	43%
Cultural attractions	47%	50%	44%	37%
Opportunity to experience local restaurants/businesses	46%	49%	44%	39%
Family-friendly location and activities	49%	52%	46%	41%
Safe and Secure Destination	58%	60%	56%	61%
Sample Size:	n=2,636	n=1,109	n=5,590	n=22,575

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?

U.S. - Hawai‘i as an Aspirational Destination

Agreement Regarding Hawai‘i as a Travel Destination (Strongly Agree)



Sample Size: n=2,636 n=1,109 n=5,590 n=22,575

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

VISION INSIGHTS

Vision Insights
Japan Traveler Profiles
2025

February 26, 2026

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

HAWAI'I TOURISM AUTHORITY

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight’s Brand Health and Profiles databases for the U.S., Canada, Japan, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Canada, Japan, Australia, and Korea

Japan - Segment Definitions

Avid Traveler

- Gross household income is 10M+ yen
- Age is 25-45
- Married or living with partner
- Might or might not have children
- Employed full time
- Either takes international vacations, very likely/likely to book a flight in the next 12 months, or book a vacation using online agencies/websites

Nationally Representative Sample (Nat Rep)

- Representative of Japan adults in terms of age, gender, social class and education

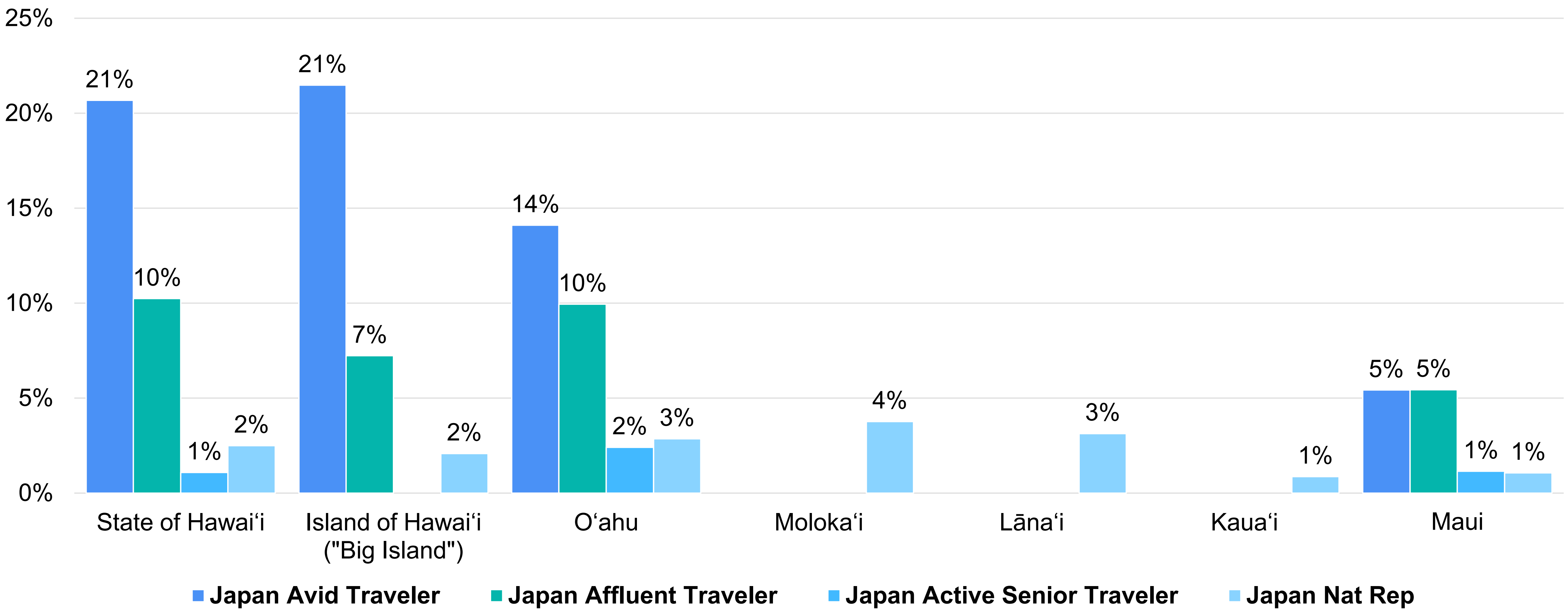
Affluent Traveler

- Gross household income is 15M+ yen
- Age is 35-60
- Married or living with partner
- Might or might not have children
- Employed full time
- Either takes international vacations, very likely/likely to book a flight in the next 12 months, family friendly locations and activities are important, or comfort and accessibility is important

Active Senior Traveler

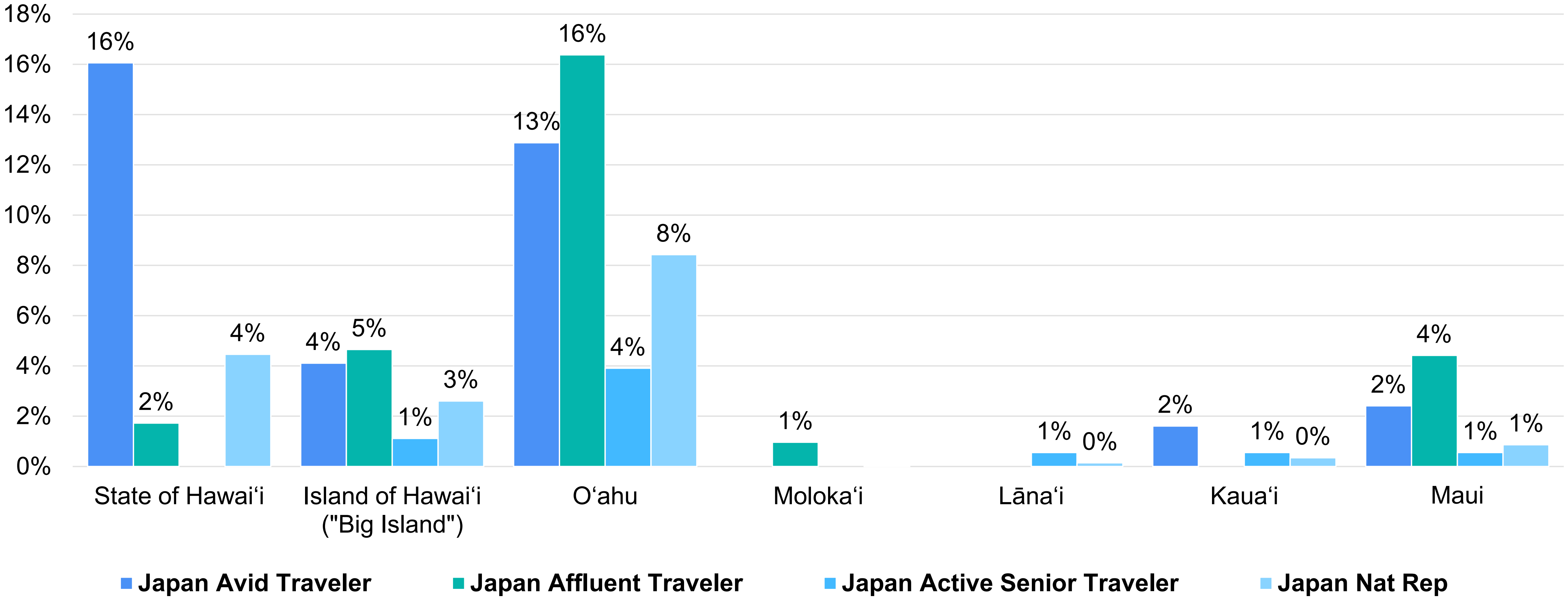
- Gross household income is greater than 1.95M+ yen
- Age is 65-75
- Belongs to a frequent flyer program
- Becomes aware of travel destinations on TV, radio, or newspaper

Japan - Leisure Trip in Past 12 Months



Sample Min. n=50

Japan - Next Destination for Leisure Trip



Sample Min. n=50

And, to which of the following destinations are you MOST LIKELY to go? (Amongst destinations Considered)

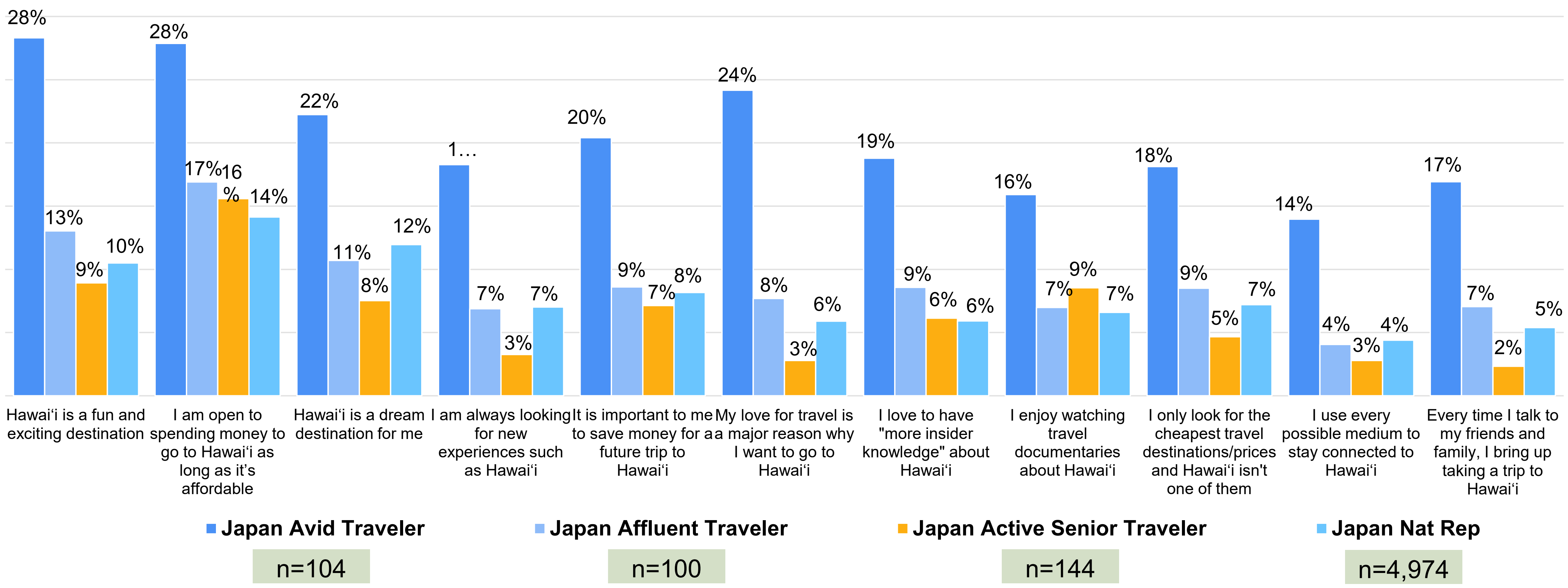
Japan - Importance of Travel Factors

	Very Important 5			
	Japan: Avid Traveler	Japan: Affluent Traveler	Japan: Active Senior Traveler	Japan Market
Value for money	22%	28%	31%	25%
Comfort and accessibility	35%	47%	39%	34%
Natural attractions/activities	31%	27%	30%	22%
Family friendly locations and activities	38%	29%	19%	23%
Opportunity to experience local restaurants/businesses	30%	28%	22%	18%
Cultural attractions	33%	32%	36%	22%
Entertainment and nightlife	31%	17%	8%	13%
Consideration of sustainable principles	8%	18%	17%	10%
Safe and Secure Destination	49%	54%	64%	55%
Sample Size:	n=104	n=100	n=144	n=4,974

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?

Japan - Hawai‘i as an Aspirational Destination

Agreement Regarding Hawai‘i as a Travel Destination
(Strongly Agree)



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

Vision Insights
Canada Traveler Profiles
2025

February 26, 2026

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

Vision Insights Syndicated Survey

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Canada - Segment Definitions

Avid Traveler $100k+

- Gross household income is $100k+
- Age is 35-49
- Takes international vacations

Long-Distance Traveler

- Gross household income is $100k+
- Age is 35-64
- Takes international vacations

Nationally Representative Sample (Nat Rep)

- Representative of Canada adults in terms of age, gender, social class and education

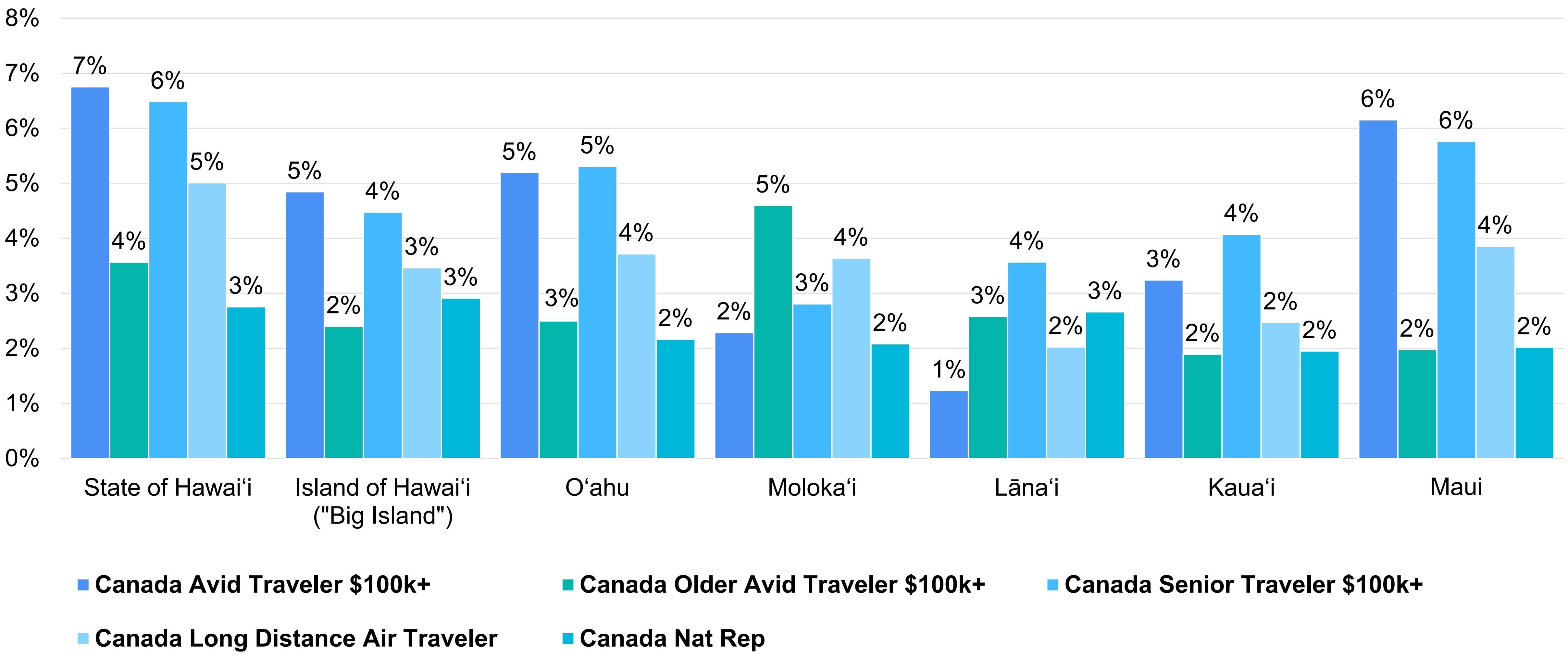
Older Avid Traveler $100k+

- Gross household income is $100k+
- Age is 50-64
- Takes international vacations

Senior Traveler $100k+

- Gross household income is $100k+
- Age is 64+
- Been to Hawai‘i (ever)

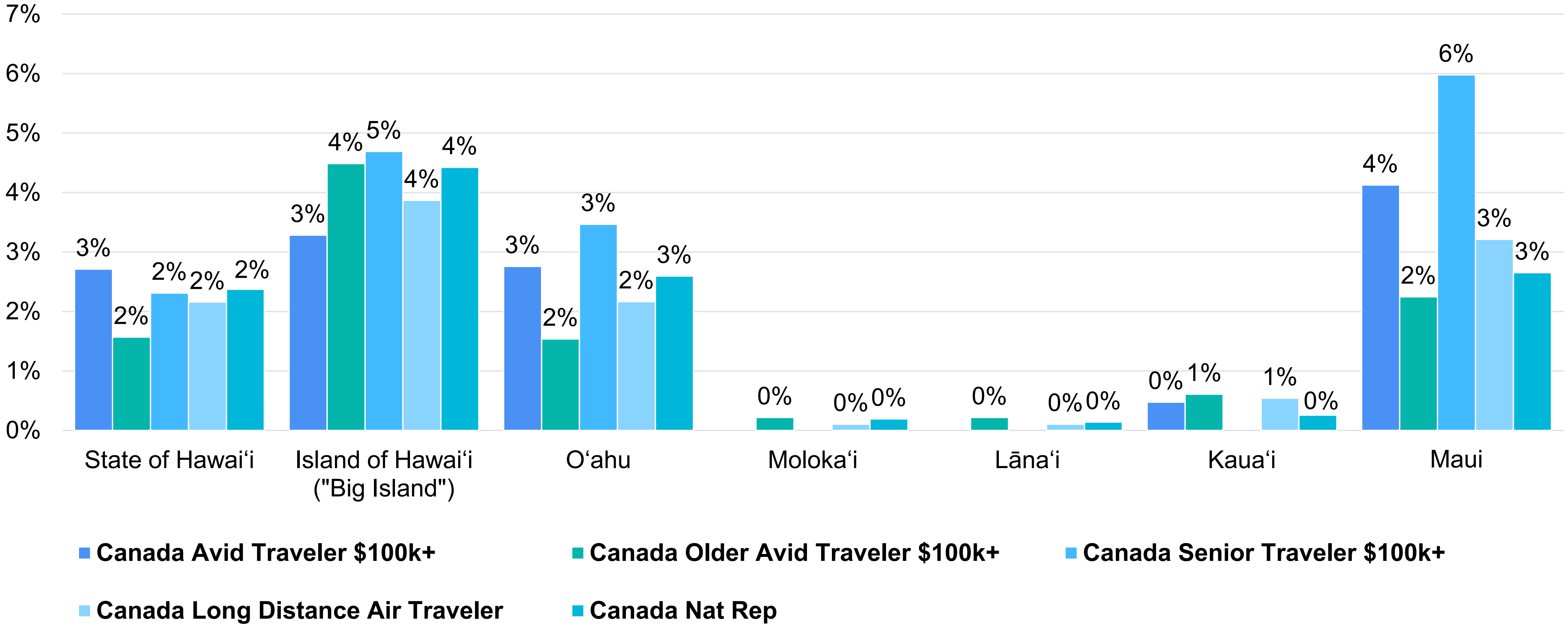
Canada - Leisure Trip in Past 12 Months



	Canada Avid Traveler $100k+	Canada Older Avid Traveler $100k+	Canada Senior Traveler $100k+	Canada Long Distance Air Traveler	Canada Nat Rep
State of Hawai‘i	7%	4%	6%	5%	3%
Island of Hawai‘i ("Big Island")	5%	2%	4%	3%	3%
O‘ahu	5%	3%	5%	4%	2%
Moloka‘i	2%	5%	3%	4%	2%
Lāna‘i	1%	3%	4%	2%	3%
Kaua‘i	3%	2%	4%	2%	2%
Maui	6%	2%	6%	4%	2%

Sample Min. n=50

Canada - Next Destination for Leisure Trip



Sample Min. n=75

And, to which of the following destinations are you MOST LIKELY to go? (Amongst destinations Considered)

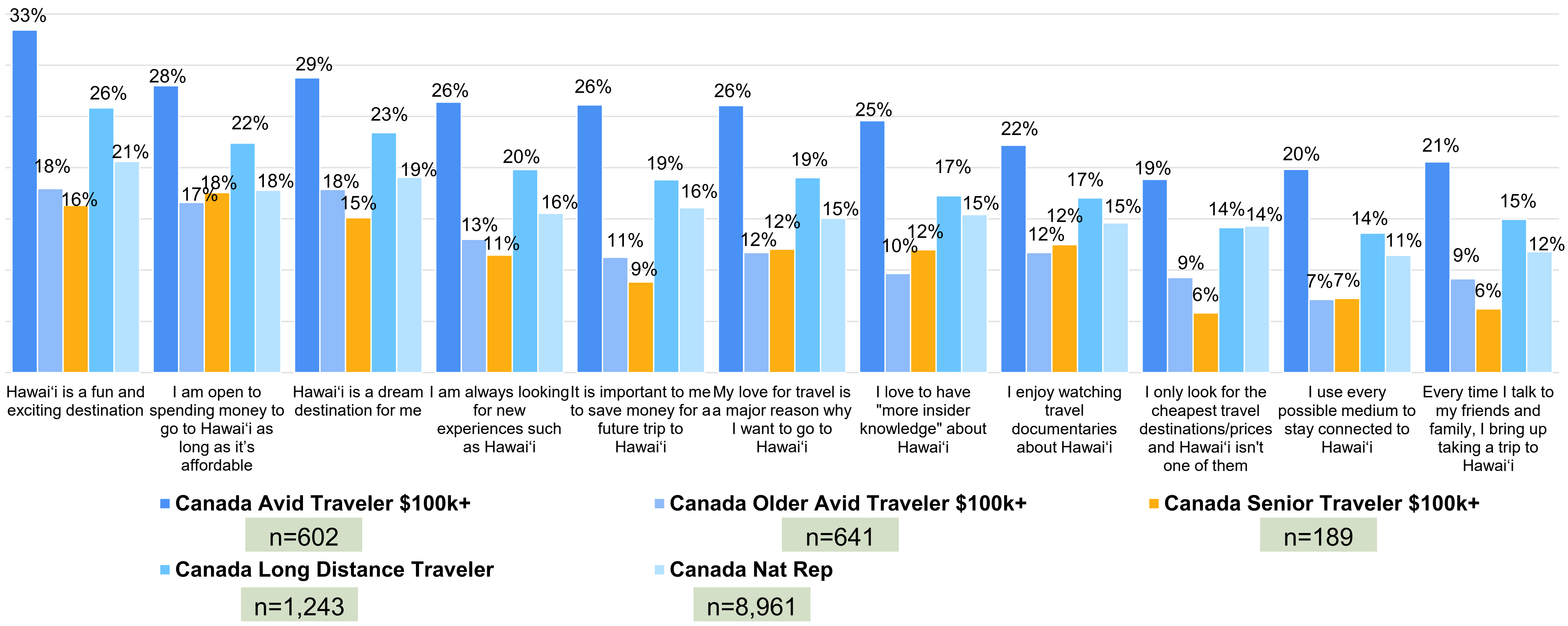
Canada - Importance of Travel Factors

	Very Important 5				
	Canada: Avid Traveler $100k+	Canada: Older Avid Traveler $100k+	Canada: Senior Traveler $100k+	Canada: Long-Distance Air Traveler	Canada Market
Value for money	53%	50%	51%	51%	56%
Comfort and accessibility	44%	44%	40%	44%	46%
Natural attractions/activities	40%	36%	41%	38%	40%
Family friendly locations and activities	40%	25%	15%	33%	32%
Opportunity to experience local restaurants/businesses	38%	32%	31%	35%	34%
Cultural attractions	38%	33%	34%	35%	34%
Entertainment and nightlife	32%	16%	7%	24%	22%
Consideration of sustainable principles	26%	17%	12%	21%	23%
Safe and Secure Destination	57%	63%	64%	60%	61%
Sample Size:	n=602	n=641	n=189	n=1,243	n=8,961

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?

Canada - Hawai‘i as an Aspirational Destination

Agreement Regarding Hawai‘i as a Travel Destination
(Strongly Agree)



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

Vision Insights
South Korea Traveler Profiles
2025

February 26, 2026

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

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight’s Brand Health and Profiles databases for the U.S., Canada, South Korea, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Canada, South Korea, Australia, and Korea

South Korea - Segment Definitions

Avid Traveler 90M+ Won

- Gross household income is 90M+ won
- Age is 25-54
- Either took an international vacation or very likely/likely to book a flight in the next 12 months

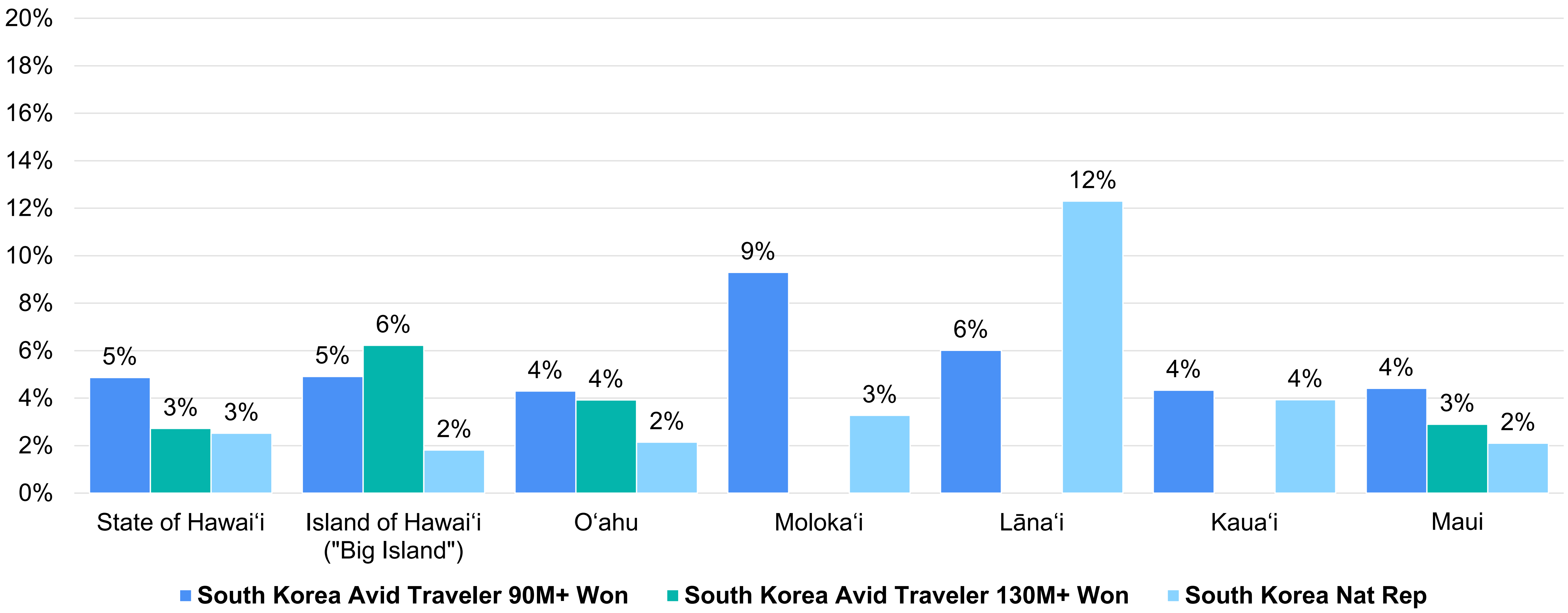
Avid Traveler 130M+ Won

- Gross household income is 130M+ won
- Age is 25-54
- Either took an international vacation, very likely/likely to book a flight in the next 12 months, or visited any of the Hawaiian Islands in the past two years

Nationally Representative Sample (Nat Rep)

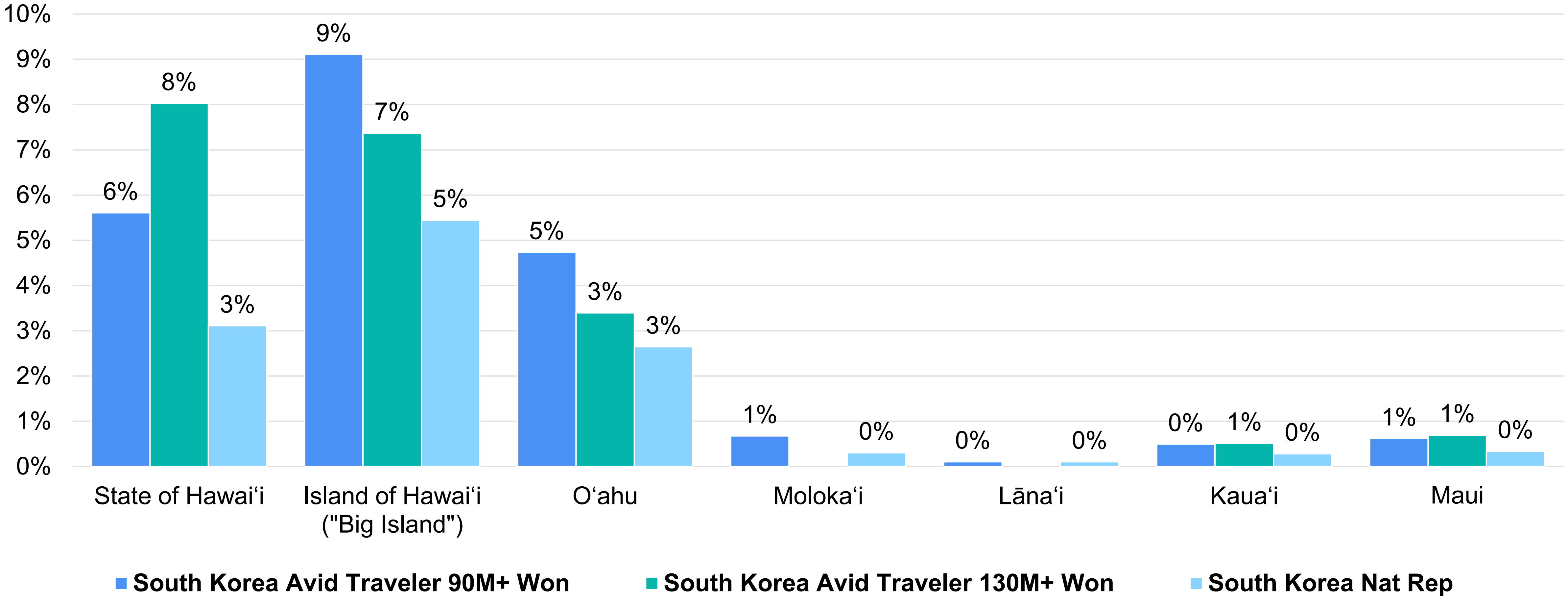
- Representative of South Korea adults in terms of age, gender, social class and education

South Korea - Leisure Trip in Past 12 Months



Sample Min. n=50

South Korea - Next Destination for Leisure Trip



Sample Min. n=50

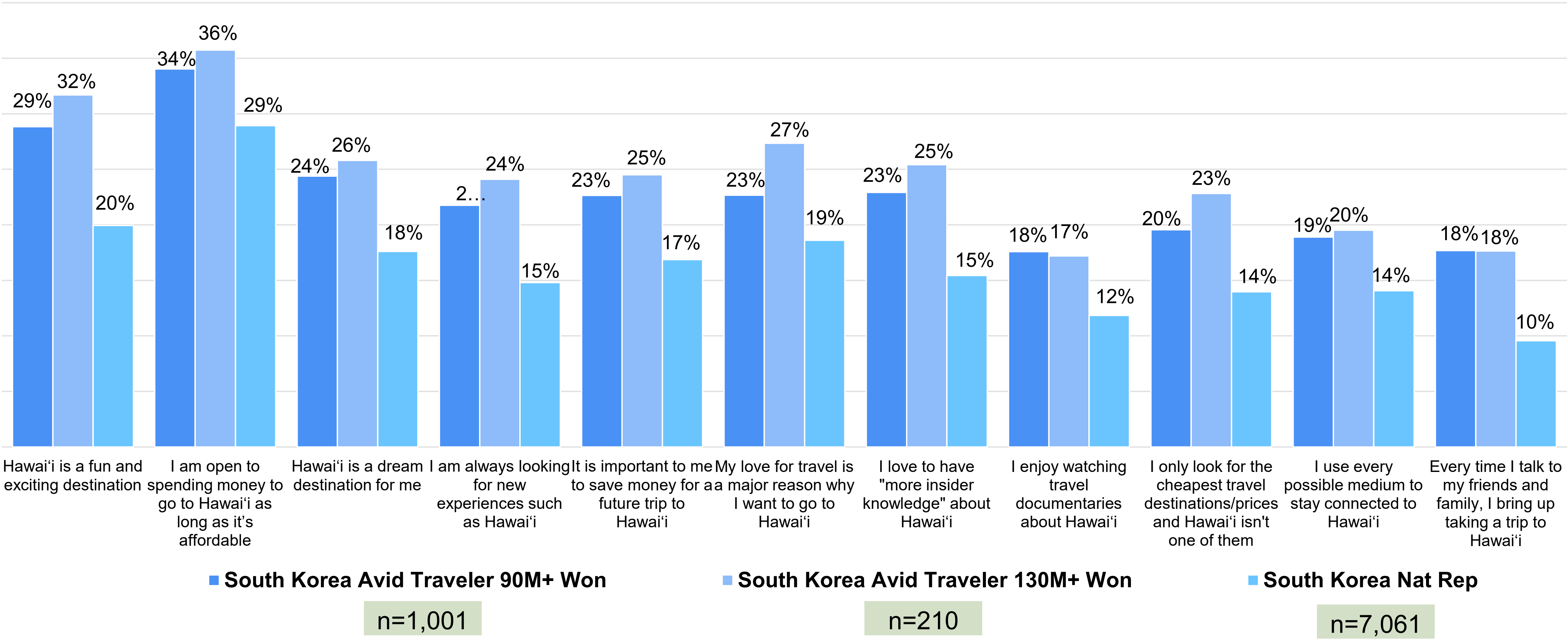
And, to which of the following destinations are you MOST LIKELY to go? (Amongst destinations Considered)

South Korea - Importance of Travel Factors

	Very Important 5		
	South Korea: Avid Traveler 90M+ Won	South Korea: Avid Traveler 130M+ Won	South Korea Market
Value for money	41%	40%	48%
Comfort and accessibility	39%	42%	45%
Natural attractions/activities	28%	28%	29%
Family friendly locations and activities	32%	34%	31%
Opportunity to experience local restaurants/businesses	28%	31%	23%
Cultural attractions	27%	31%	27%
Entertainment and nightlife	18%	20%	14%
Consideration of sustainable principles	19%	18%	17%
Safe and secure destination	53%	55%	62%
Sample Size:	n=1,001	n=210	n=7,061

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?

South Korea - Hawaiʻi as an Aspirational Destination



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

Vision Insights
Australia Traveler Profiles
2025

February 26, 2026

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

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight’s Brand Health and Profiles databases for the U.S., Canada, Japan, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Canada, Japan, Australia, and Korea
- For the Australia Profiles, the sample size for the Avid Traveler segment is below the minimum sample size requirement so the breakdown of this segment for selected sections (e.g., annual vacation, importance of travel factors, Hawai‘i as an aspirational destination, & sustainability and travel responsibility statements) are unavailable

Australia - Segment Definitions

Family Traveler

- Gross household income is $150k+
- Age is 35-50
- Has children under the age of 18
- Either takes international vacations or whose most recent leisure destination was Hawai‘i/USA/or Southeast Asia in the past 12 months

Avid Traveler

- Gross household income is $100k+
- Age is 45-65
- Been to Hawai‘i more than 2x in the past
- Either takes international vacations or likely/very likely to book an air trip in the next 12 months

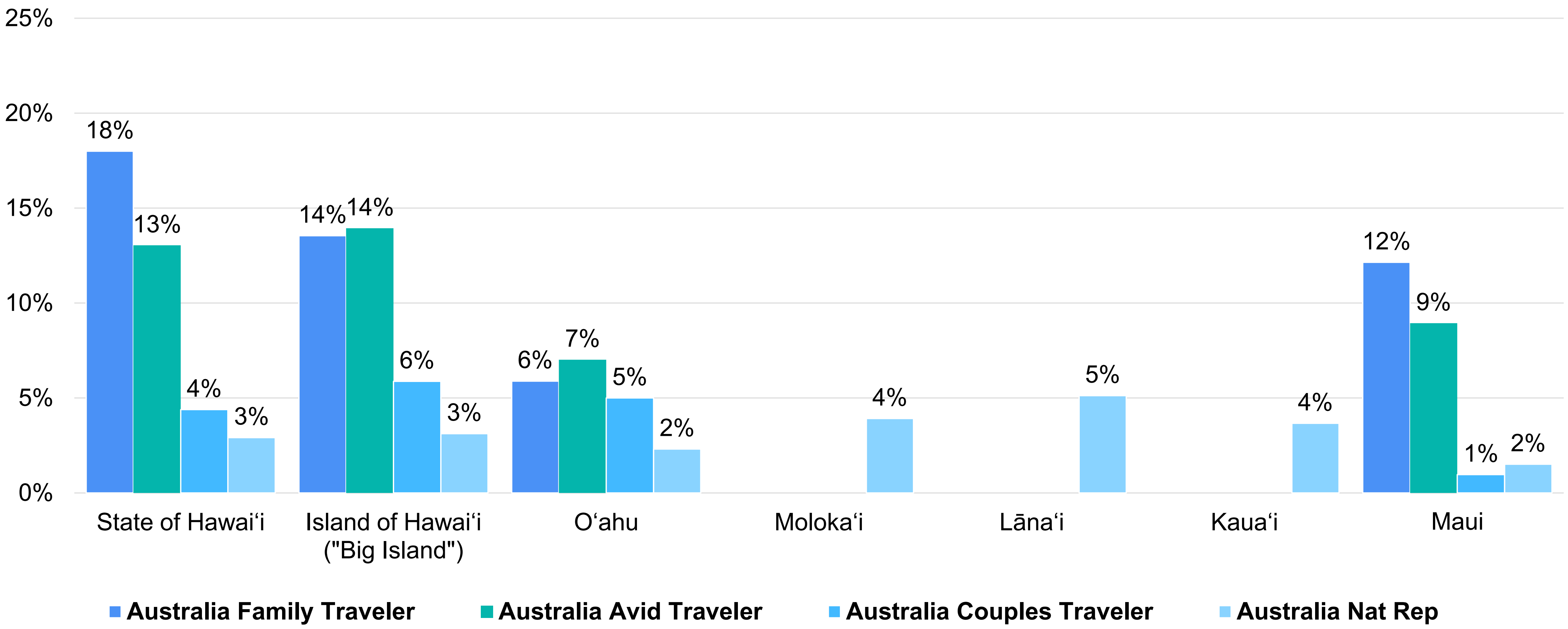
Couples Traveler

- Gross household income is $100k+
- Married or living with partner
- Age is 30-50
- Not traveling with children under the age of 18
- Either takes international vacations, are likely/very likely to book an air trip in the next 12 months, or whose most recent leisure destination was either Hawai‘i/Europe/Bali/Fiji/California/or Thailand in the past two years

Nationally Representative Sample (Nat Rep)

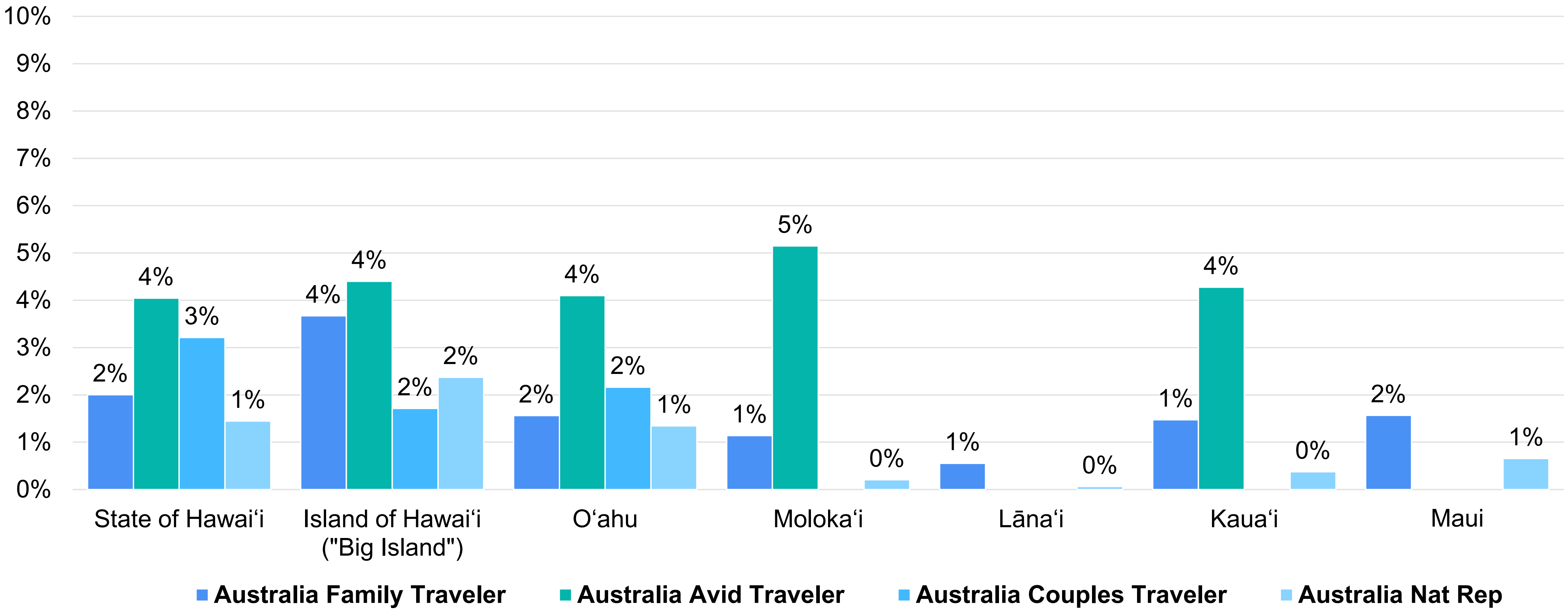
- Representative of Australia adults in terms of age, gender, social class and education

Australia - Leisure Trip in Past 12 Months



Sample Min. n=50

Australia - Next Destination for Leisure Trip



Sample Min. n=50

And, to which of the following destinations are you MOST LIKELY to go? (Amongst destinations Considered)

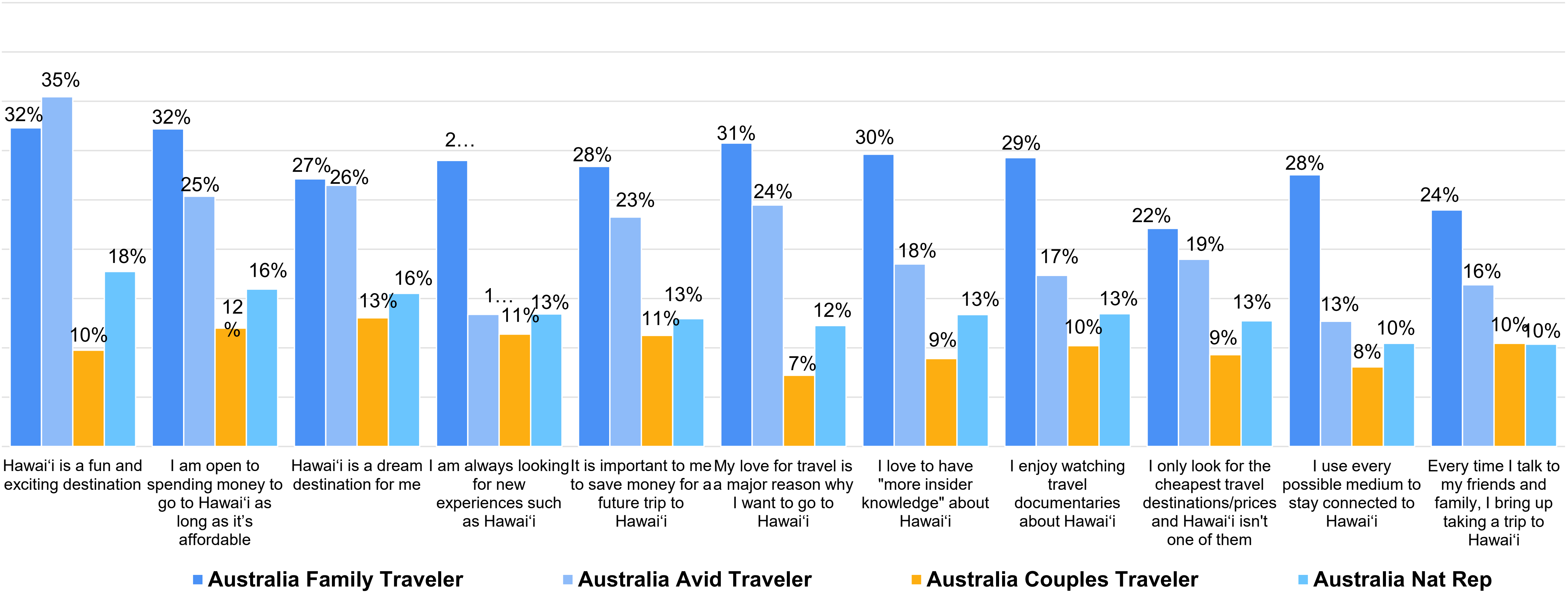
Australia - Importance of Travel Factors

	Very Important 5			
	Australia: Family Traveler	Australia: Avid Traveler	Australia: Couples Traveler	Australia Market
Value for money	52%	55%	42%	53%
Comfort and accessibility	47%	45%	38%	42%
Natural attractions/activities	49%	49%	34%	40%
Family friendly locations and activities	51%	32%	22%	32%
Opportunity to experience local restaurants/businesses	43%	50%	32%	34%
Cultural attractions	43%	49%	50%	33%
Entertainment and nightlife	35%	28%	21%	21%
Consideration of sustainable principles	33%	26%	17%	21%
Safe and secure destination	60%	60%	52%	58%
Sample Size:	n=279	n=89	n=147	n=6,885

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?

Australia - Hawai‘i as an Aspirational Destination

Agreement Regarding Hawai‘i as a Travel Destination (Strongly Agree)



n=279	n=89	n=147	n=6,885

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

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

Vision Insights
Responsible Travelers Segment

VISION INSIGHTS

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight’s Responsible Travelers Segment databases for the State of Hawai‘i (O‘ahu, Maui, Kaua‘i and Hawai‘i Island)
- Consumers are surveyed each day
- Data reflects two-week moving average
- DBEDT receives access to new data each week for daily responsible traveler metrics – media-focused, brand health, purchase/intent, and consumer status
- Responsible Traveler Segment
  - Respondents who self-identify as responsible travelers (i.e., wellness focused, environmental impact, culturally minded)

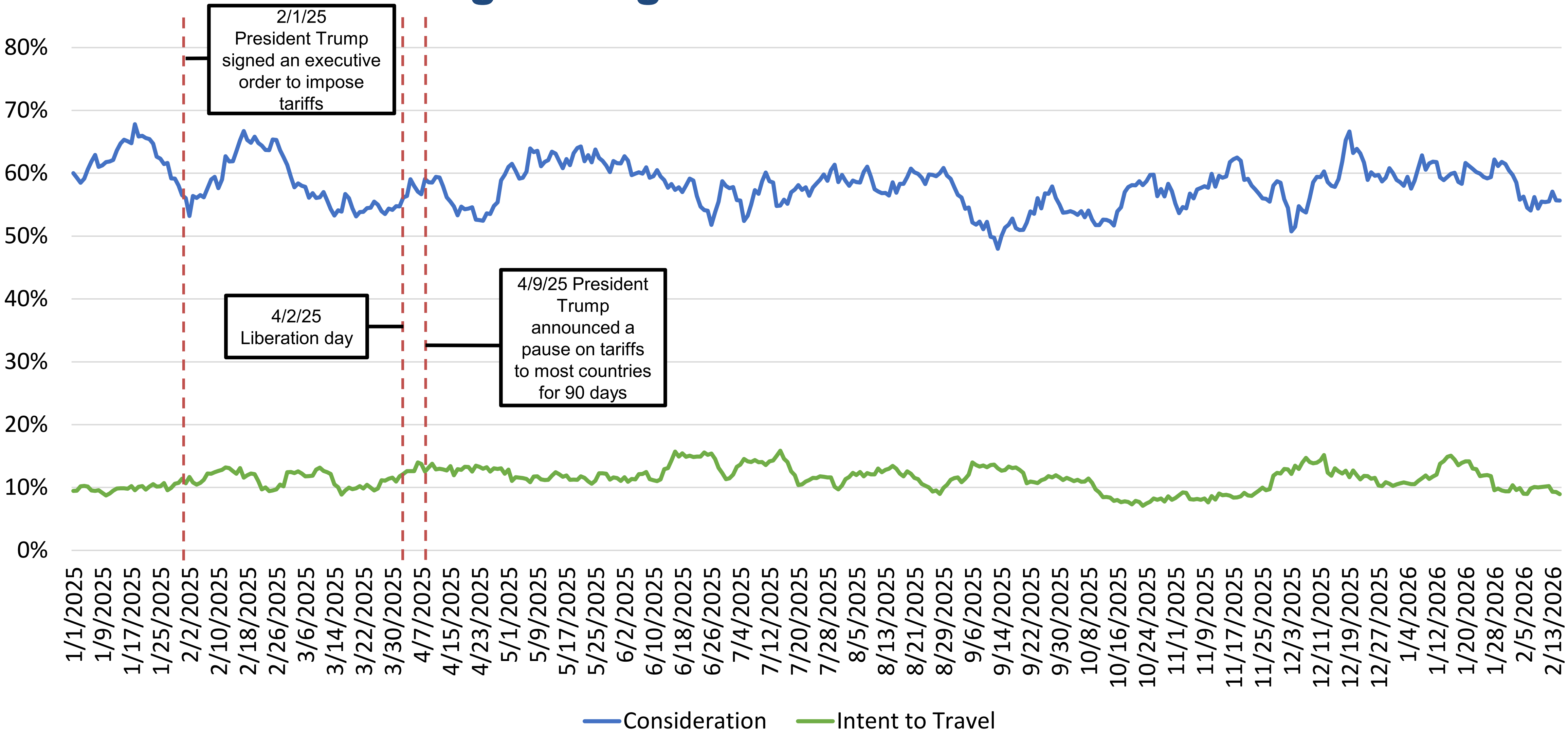
Vision Insights Metrics

- **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)
- **Intent to Travel:** Percentage of people who intend to travel to a destination

Destinations

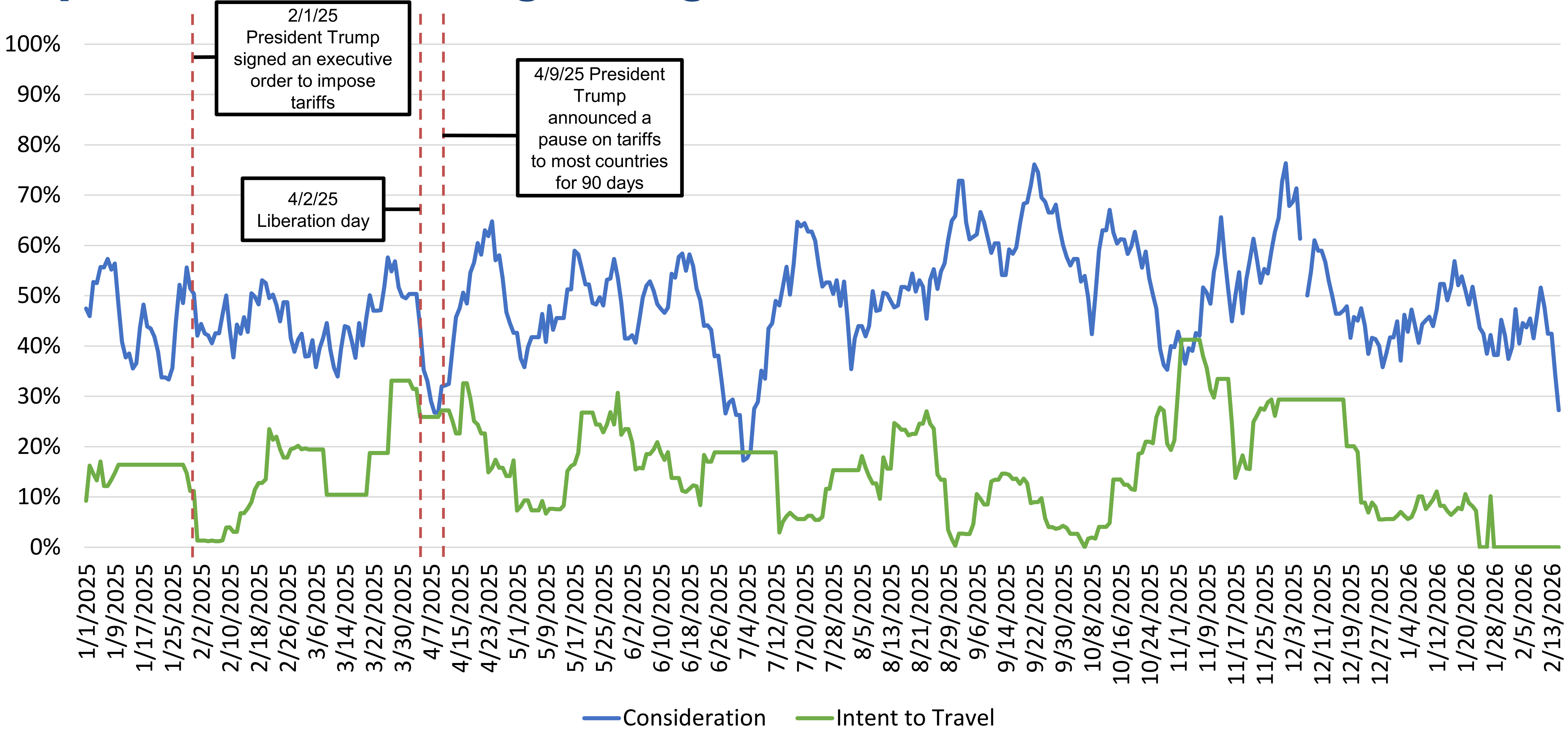
- Respondents are asked about:
  - State of Hawaiʻi
  - Oʻahu
  - Maui
  - Kauaʻi
  - Hawaiʻi Island
- Selecting any Hawaiian Island indicates respondents’ intent to travel to/chatter/consideration for the overall Hawaiʻi brand (the concept of a beautiful place called “Hawaiʻi”) and lack of familiarity with individual islands

State of Hawai'i – Consideration and Intent to Travel
U.S. Two-Week Moving Average



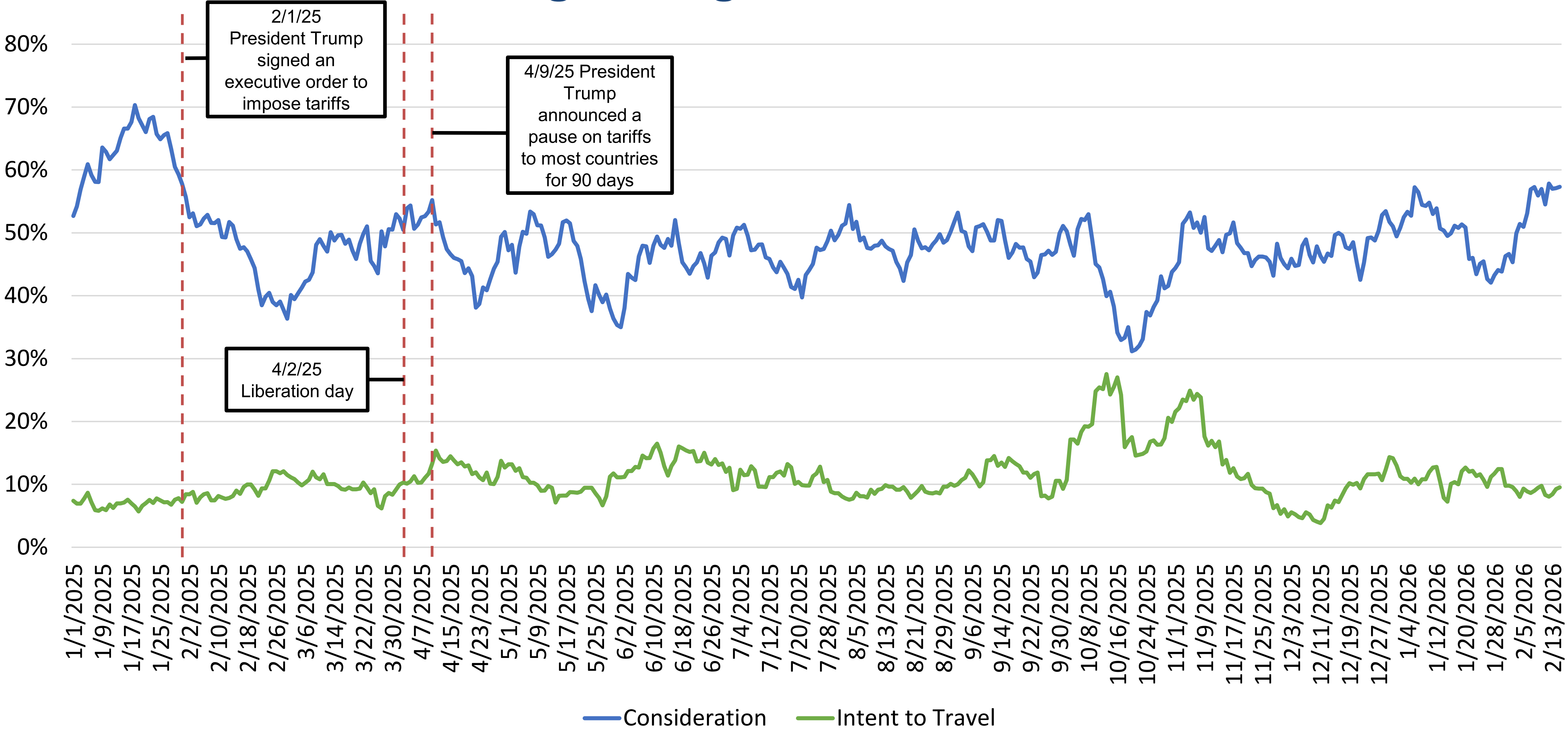
Source: Vision Insights Data as of February 26. 2026

State of Hawaiʻi – Consideration and Intent to Travel Japan Two-Week Moving Average



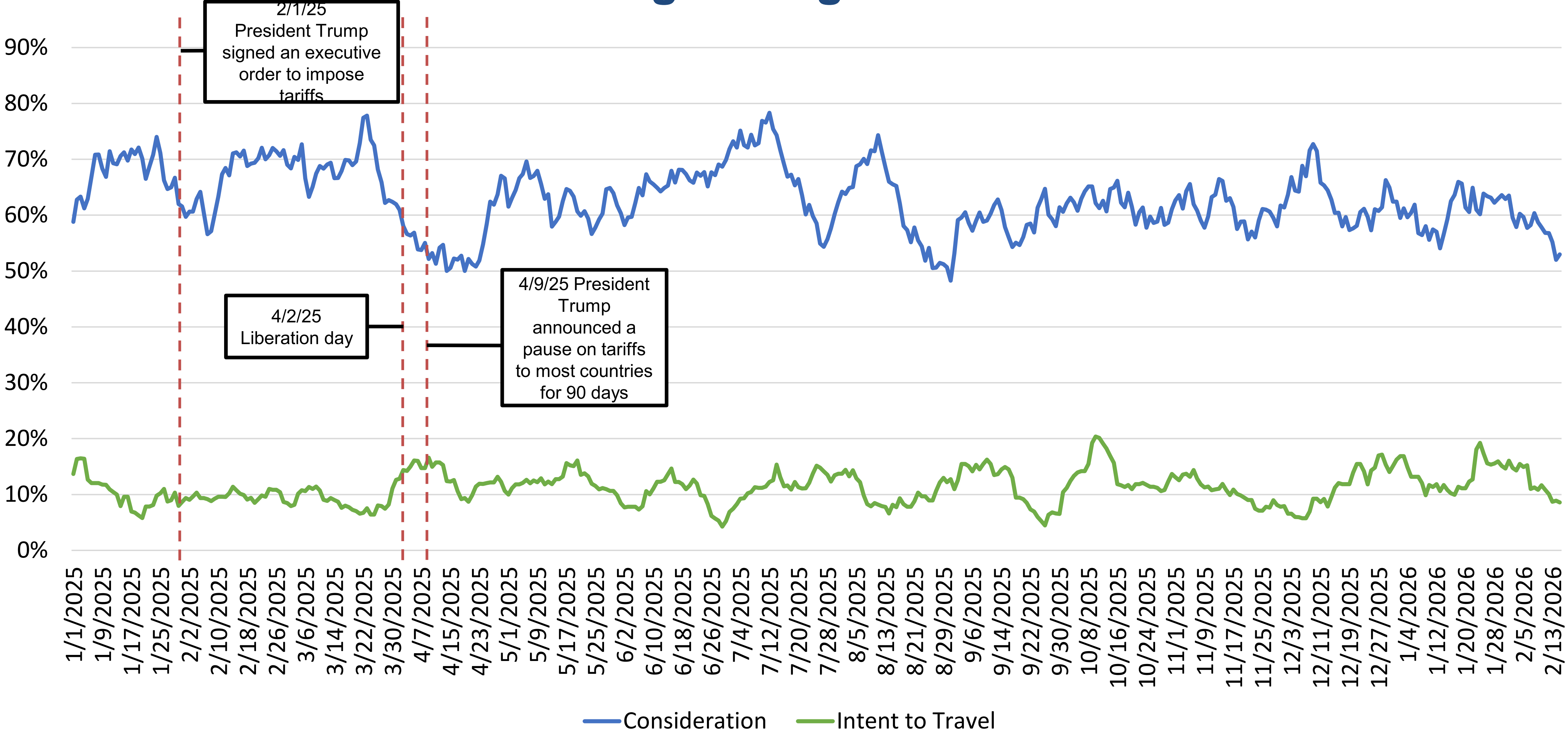
Source: Vision Insights Data as of February 26. 2026

State of Hawaiʻi – Consideration and Intent to Travel Canada Two-Week Moving Average



Source: Vision Insights Data as of February 26. 2026

State of Hawaiʻi – Consideration and Intent to Travel South Korea Two-Week Moving Average



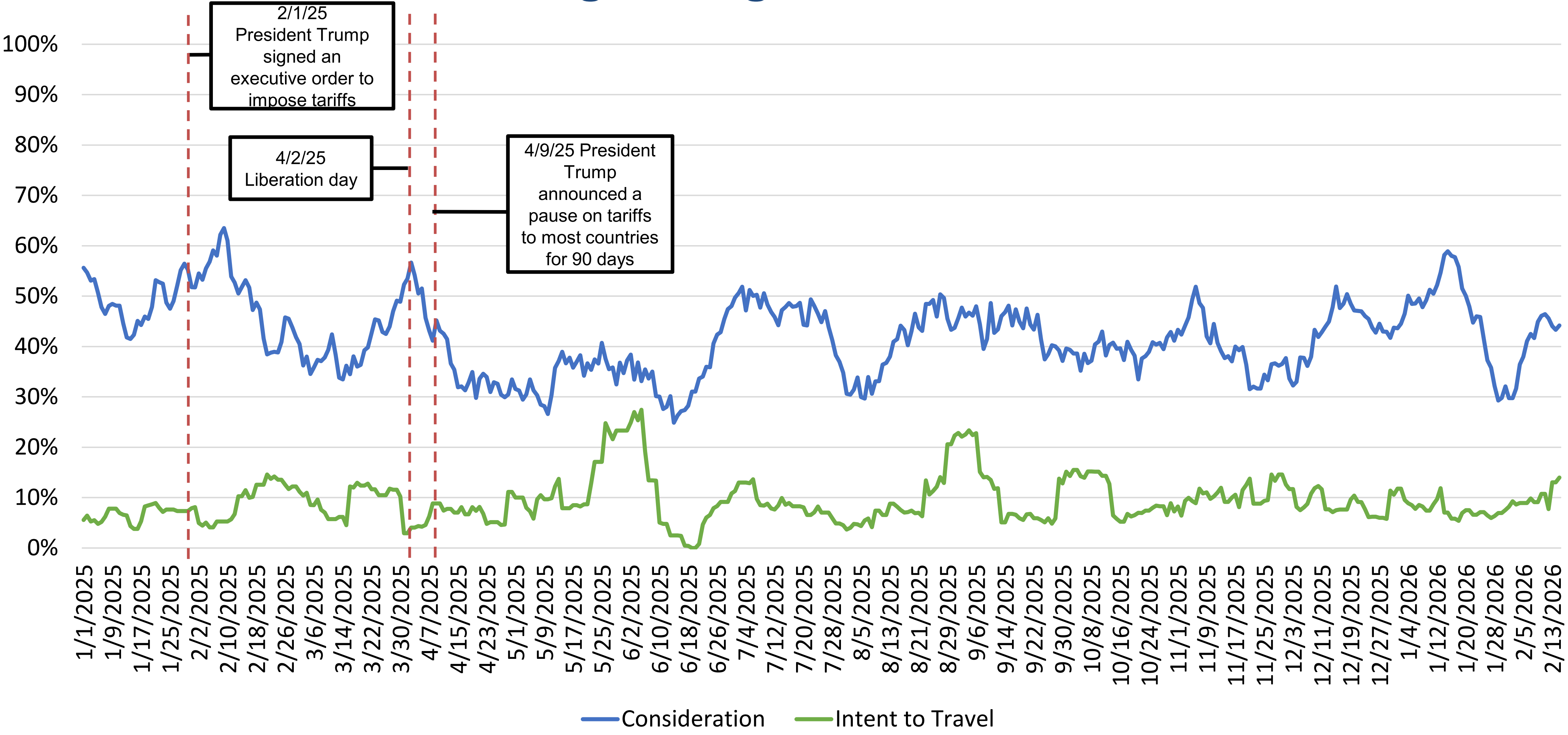
2/1/25 President Trump signed an executive order to impose tariffs

4/2/25 Liberation day

4/9/25 President Trump announced a pause on tariffs to most countries for 90 days

Source: Vision Insights Data as of February 26. 2026

State of Hawaiʻi – Consideration and Intent to Travel Australia Two-Week Moving Average



Source: Vision Insights Data as of February 26. 2026

MAHALO!

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HAWAIʻI TOURISM
AUTHORITY