#### HTA REGULAR BOARD MEETING

Thursday, March 31, 2022

Hō 'ike 'Ikepili Noi 'i 'Oihana Ho 'omāka 'ika 'i
Presentation and Discussion of Current Market Insights and
Conditions in Hawai'i and Key Major Hawai'i Tourism
Markets, including the United States, Japan, Canada,
Oceania, and Cruise

Jennifer Chun
Director of Tourism Research





EXPENDITURES			
(\$mil.)	2022P	2021P	2019
TOTAL (AIR)	1,307.3	397.1	1,383.3
U.S. West	728.3	264.6	499.7
U.S. East	437.1	116.1	371.6
Japan	8.1	2.4	165.5
Canada	78.7	2.3	153.0
All Others	55.2	11.7	193.5

2022P	2021P	2019
222.4	156.2	202.1
227.0	156.8	184.2
233.8	153.6	209.1
201.5	200.1	242.2
178.2	165.2	183.8
172.6	160.1	230.8
	222.4 227.0 233.8 201.5 178.2	222.4 156.2 227.0 156.8 233.8 153.6 201.5 200.1 178.2 165.2

VISITOR			
ARRIVALS	2022P	2021P	2019
TOTAL (AIR)	623,691	235,283	764,513
U.S. West	376,761	164,861	312,235
U.S. East	186,758	63,899	176,777
Japan	2,181	695	120,653
Canada	29,046	493	66,590
All Others	28,945	5,336	88,258

AVERAGE DAILY			
CENSUS	2022P	2021P	2019
TOTAL (AIR)	209,968	90,776	244,420
U.S. West	114,594	60,249	96,870
U.S. East	66,760	26,996	63,462
Japan	1,431	430	24,408
Canada	15,768	488	29,741
All Others	11,415	2,613	29,939

Note: 2022 and 2021 figures are preliminary.



EXPENDITURES			
(\$mil.)	2022P	2021P	2019
Oʻahu	540.1	164.0	609.0
Maui	402.8	135.4	413.2
Moloka'i	3.0	0.9	3.3
Lānaʻi	13.0	4.1	12.7
Kaua'i	149.3	29.7	152.8
Hawai'i Island	199.1	62.9	192.3

PPPD			
SPENDING (\$)	2022P	2021P	2019
Oʻahu	233.8	163.0	198.6
Maui	235.0	150.1	220.1
Moloka'i	143.9	97.6	125.1
Lāna'i	588.8	397.0	579.1
Kaua'i	205.6	284.0	193.0
Hawaiʻi Island	183.4	123.7	181.3

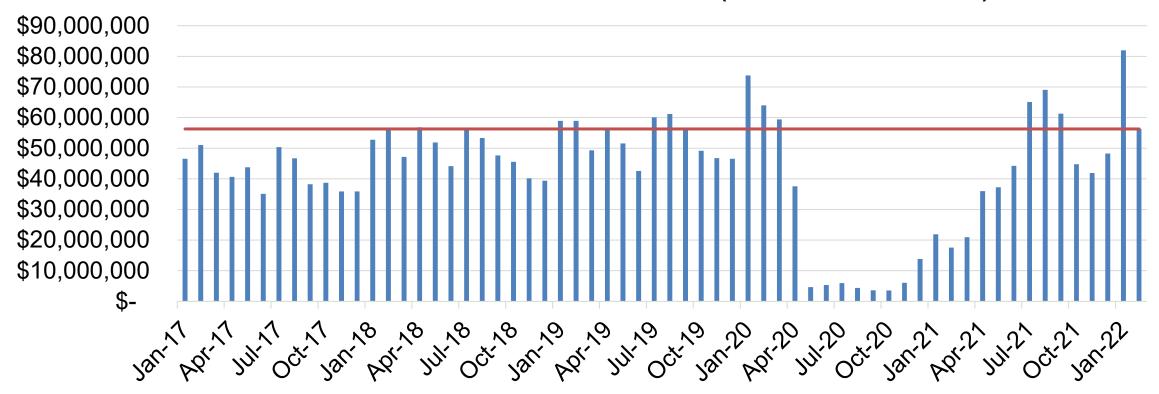
VISITOR			
ARRIVALS	2022P	2021P	2019
Oʻahu	308,705	105,424	454,687
Maui	193,232	92,608	221,603
Moloka'i	3,240	993	5,542
Lāna'i	4,814	1,604	6,208
Kaua'i	88,428	7,349	104,445
Hawaiʻi Island	122,480	46,558	138,387

AVERAGE DAILY			
CENSUS	2022P	2021P	2019
Oʻahu	82,507	35,935	109,506
Maui	61,218	32,237	67,040
Moloka'i	739	339	938
Lānaʻi	791	371	781
Kaua'i	25,932	3,730	28,271
Hawaiʻi Island	38,781	18,163	37,883

Note: 2022 and 2021 figures are preliminary.



- Preliminary February TAT Collections: \$56.3 million
- Preliminary Fiscal 22 TAT Collections: \$468.7 million (+509.9%)
- Fiscal 21 TAT Collections: \$76.8 million (+\$391.8 million)



Source: Department of Taxation





PURPOSE OF TRIP - %										
Total	Total b	y Air	US W	est	US E	ast	Japa	an	Cana	ıda
	2022P	2019	2022P	2019	2022P	2019	2022P	2019	2022P	2019
Pleasure (Net)	84.8%	82.8%	85.8%	82.4%	82.7%	78.2%	57.8%	82.4%	93.2%	93.8%
Honeymoon/Get Married	3.1%	4.9%	2.5%	2.4%	4.0%	3.6%	1.8%	13.1%	2.4%	2.7%
Honeymoon	2.5%	4.3%	1.9%	1.8%	3.5%	2.8%	1.0%	12.5%	2.0%	2.6%
Get Married	0.7%	0.9%	0.7%	0.7%	0.8%	1.0%	1.6%	1.9%	0.4%	0.1%
Pleasure/Vacation	82.4%	78.5%	83.9%	80.6%	79.6%	75.2%	55.9%	70.3%	90.9%	91.7%
Mtgs/Conventions/Incentive	3.7%	7.4%	2.7%	5.9%	5.2%	10.4%	1.0%	9.1%	3.0%	5.5%
Conventions	1.8%	4.0%	1.5%	3.7%	2.6%	6.7%	0.6%	1.6%	2.0%	3.4%
Corporate Meetings	0.9%	1.2%	0.7%	1.5%	1.2%	1.9%	0.3%	0.2%	0.6%	0.7%
Incentive	1.1%	2.4%	0.5%	1.0%	1.7%	2.2%	0.1%	7.4%	0.6%	1.5%
Other Business	2.4%	2.9%	2.4%	4.2%	2.6%	3.9%	6.5%	0.5%	0.5%	0.8%
Visit Friends/Rel.	11.8%	7.9%	11.9%	10.8%	12.8%	10.7%	23.0%	1.7%	4.9%	3.1%
Gov't/Military	1.0%	1.4%	0.7%	1.0%	1.5%	2.5%	5.0%	0.0%	0.1%	0.1%
Attend School	0.1%	0.3%	0.1%	0.1%	0.1%	0.3%	4.1%	0.5%	0.0%	0.1%
Sport Events	0.4%	0.6%	0.4%	0.7%	0.2%	0.6%	2.9%	0.6%	0.1%	0.5%
Other	2.1%	3.9%	2.0%	3.1%	2.1%	3.2%	8.2%	9.5%	1.7%	1.0%

Note: 2022 and 2021 figures are preliminary.





ACCOMMODATIONS - % Total	Total b	y Air	US W	lest	US E	ast	Japa	an	Cana	ada
	2022P	2019	2022P	2019	2022P	2019	2022P	2019	2022P	2019
Plan to stay in Hotel	52.7%	59.3%	50.6%	49.5%	56.2%	56.8%	46.9%	86.7%	44.8%	42.4%
Plan to stay in Condo	18.8%	16.5%	19.3%	18.7%	16.4%	15.1%	27.6%	10.4%	33.2%	31.1%
Plan to stay in Timeshare	8.6%	7.4%	8.7%	9.0%	8.8%	9.1%	5.4%	4.4%	10.4%	8.7%
Cruise Ship	0.0%	1.3%	0.0%	0.7%	0.1%	3.3%	0.0%	0.3%	0.1%	1.2%
Friends/Relatives	12.5%	9.6%	12.6%	12.6%	13.2%	12.6%	24.6%	1.2%	7.6%	4.7%
Bed & Breakfast	1.2%	1.4%	1.1%	1.3%	1.4%	1.7%	0.2%	0.2%	0.8%	2.2%
Rental House	12.4%	11.0%	12.6%	14.0%	12.4%	11.3%	2.5%	0.3%	12.0%	17.8%
Hostel	0.7%	1.2%	0.6%	0.8%	0.7%	0.9%	0.6%	0.2%	1.3%	2.3%
Camp Site, Beach	0.8%	0.8%	0.8%	0.8%	0.8%	0.8%	0.1%	0.1%	0.6%	2.4%
Private Room in Private Home**	1.1%	2.0%	1.0%	1.7%	1.1%	1.9%	2.6%	0.2%	2.0%	3.2%
Shared Room/Space in Private										
Home**	0.3%	0.6%	0.3%	0.6%	0.3%	0.6%	2.0%	0.2%	0.4%	0.5%
Other	1.4%	1.4%	1.4%	2.0%	1.5%	1.8%	3.2%	0.0%	0.7%	1.2%

Note: 2022 and 2021 figures are preliminary.





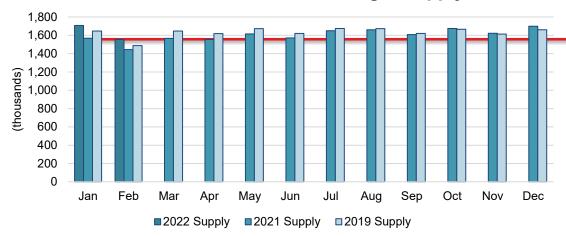
#### **State of Hawai'i Hotel Performance**

	2022	2021	2019
Occupancy	72.1%	30.5%	83.5%
ADR	\$351	\$260	\$292
RevPAR	\$253	\$79	\$243

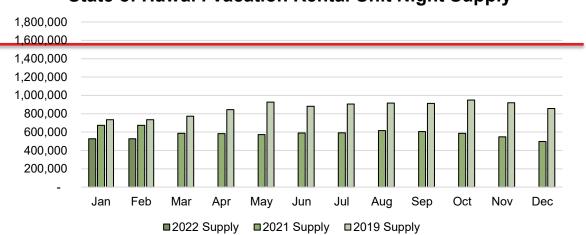
#### State of Hawai'i Vacation Rental Performance

	2022	2021	2019
Occupancy	73.1%	49.8%	82.3%
ADR	\$296	\$242	\$217

#### State of Hawai'i Hotel Room Night Supply



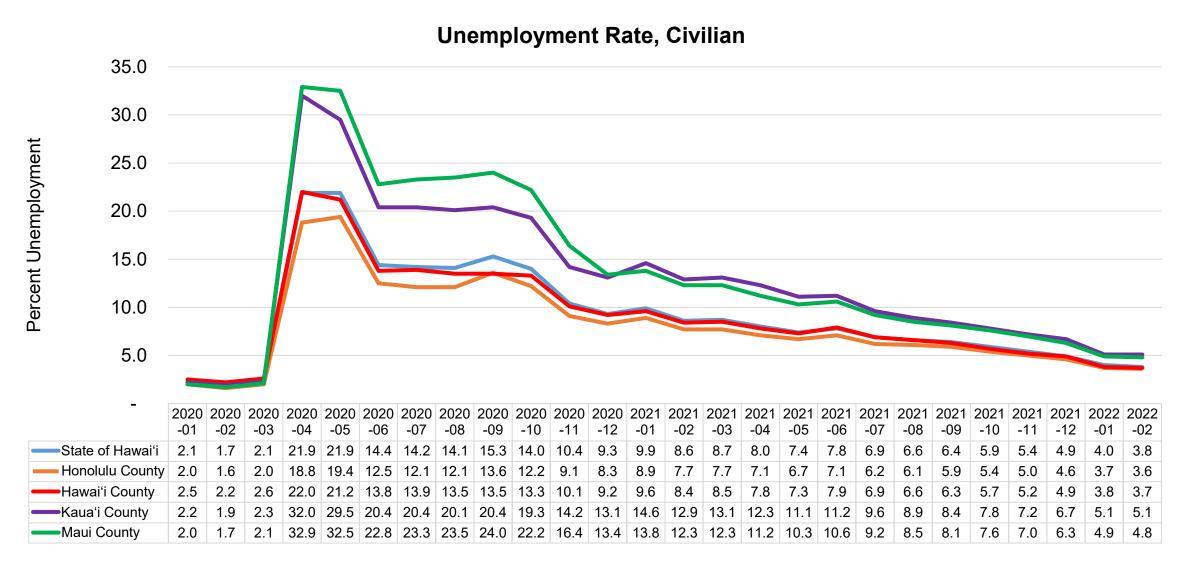
#### State of Hawai'i Vacation Rental Unit Night Supply



Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority, Transparent Intelligence, Inc. © Copyright 2022 State of Hawai'i Department of Business, Economic Development & Tourism





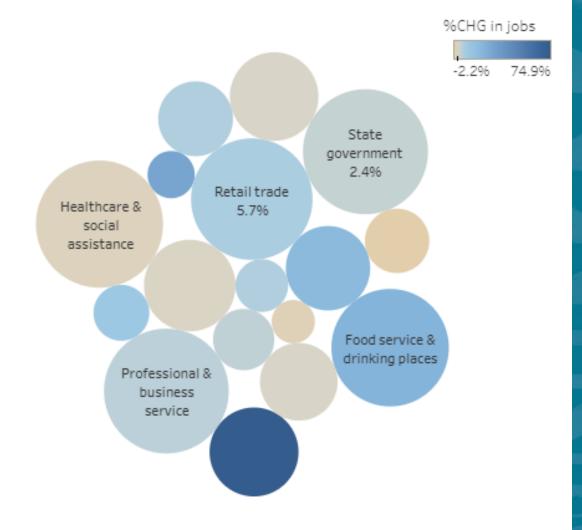


Compiled by Research & Economic Analysis Division, State of Hawaii Department of Business, Economic Development and Tourism. Source: State of Hawaiii Dep. of Labor & Industrial Relations





	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	600,800	42,800	7.7%
Nat'l resources, mining & construction	36,800	-100	-0.3%
Manufacturing	12,200	600	5.2%
Wholesale trade	16,500	500	3.1%
Retail trade	64,900	3,500	5.7%
Transportation, warehousing & utilities	31,300	4,900	18.6%
Information	8,200	-100	-1.2%
Financial activities	26,500	0	0.0%
Professional & business service	68,400	2,500	3.8%
Educational service	13,700	1,200	9.6%
Healthcare & social assistance	71,000	-500	-0.7%
Arts, entertainment & recreation	9,800	2,200	28.9%
Accommodation	34,800	14,900	74.9%
Food service & drinking places	60,700	10,800	21.6%
Other service	24,600	1,200	5.1%
Federal government	34,500	0	0.0%
State government	68,700	1,600	2.4%
Local government	18,200	-400	-2.2%



Compiled by Research & Economic Analysis Division, State of Hawaii Department of Business, Economic Development and Tourism. Source: State of Hawaii Dep. of Labor & Industrial Relations





<sup>\*</sup>Change from the same period of previous year

## Scheduled Nonstop Seats to Hawai'i by Port Entry

March	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,147,894	662,648	1,185,426	1,029,748	643,711	836,583	118,146	18,937	348,843
HONOLULU	578,646	354,431	713,111	509,436	336,022	422,760	69,210	18,409	290,351
KAHULUI	329,044	200,961	250,043	293,411	200,433	216,456	35,633	528	33,587
KONA	130,795	91,766	124,674	122,712	91,766	106,853	8,083	0	17,821
HILO	3,899	1,992	3,665	3,899	1,992	3,665	0	0	0
LIHU'E	105,510	13,498	93,933	100,290	13,498	86,849	5,220	0	7,084

April	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,100,354	724,110	1,098,664	967,280	703,783	777,559	133,074	20,327	321,105
HONOLULU	578,453	370,053	670,423	483,529	350,442	395,313	94,924	19,611	275,110
KAHULUI	300,150	225,584	241,065	272,380	224,868	213,772	27,770	716	27,293
KONA	117,001	92,143	103,121	110,623	92,143	89,117	6,378	0	14,004
HILO	2,887	2,158	3,873	2,887	2,158	3,873	0	0	0
LIHU'E	101,863	34,172	80,182	97,861	34,172	75,484	4,002	0	4,698

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of March 28, 2022, subject to change





## Scheduled Nonstop Seats to Hawai'i by Port Entry

May	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,107,920	825,181	1,108,820	978,397	803,653	818,795	129,523	21,528	290,025
HONOLULU	604,123	420,233	690,095	486,901	398,837	419,399	117,222	21,396	270,696
KAHULUI	279,036	243,005	228,732	268,403	242,873	219,464	10,633	132	9,268
KONA	119,475	107,706	106,089	117,807	107,706	96,028	1,668	0	10,061
HILO	3,183	2,158	3,938	3,183	2,158	3,938	0	0	0
LIHU'E	102,103	52,079	79,966	102,103	52,079	79,966	0	0	0

June	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,248,476	987,982	1,176,403	1,061,169	967,345	898,420	187,307	20,637	277,983
HONOLULU	689,772	497,693	701,510	520,773	477,056	441,174	168,999	20,637	260,336
KAHULUI	297,872	278,205	265,892	289,148	278,205	257,829	8,724	0	8,063
KONA	144,513	124,659	114,157	134,929	124,659	104,573	9,584	0	9,584
HILO	5,191	4,999	4,700	5,191	4,999	4,700	0	0	0
LIHU'E	111,128	82,426	90,144	111,128	82,426	90,144	0	0	0

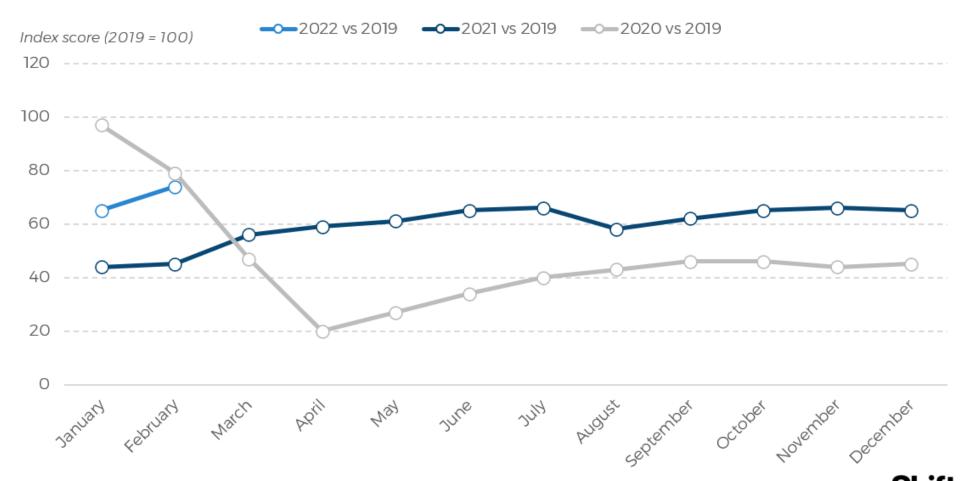
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of March 28, 2022, subject to change





#### Skift Travel Health Index = 74

#### Global Travel Index Score (Weighted Average)



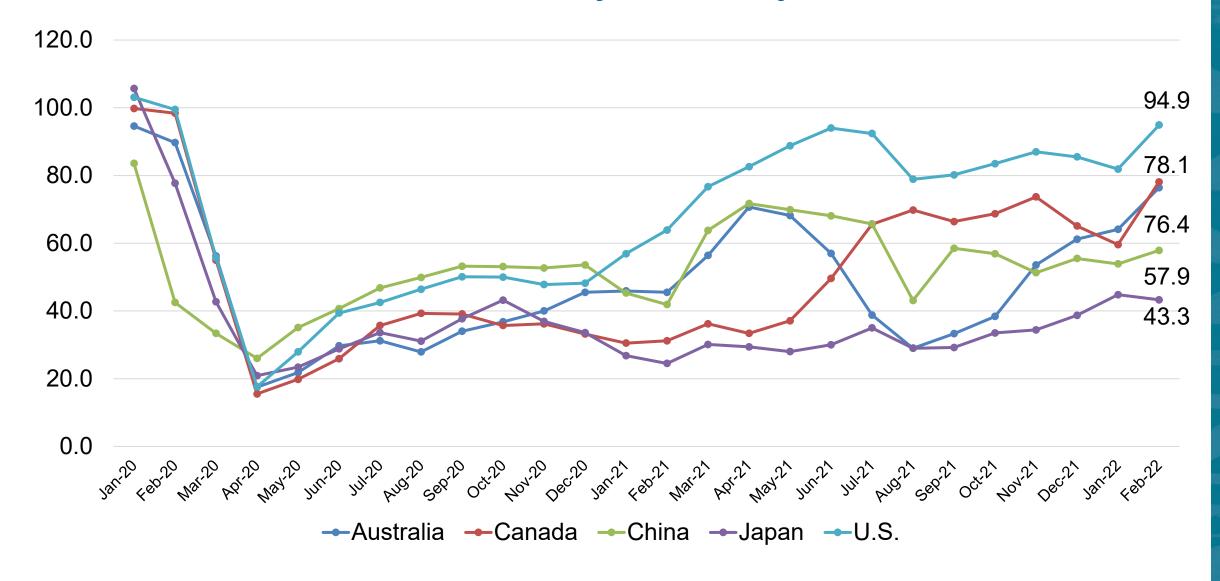
Source: Skift Research from partner data

Source: Skift Research





#### Skift Travel Health Index by Country

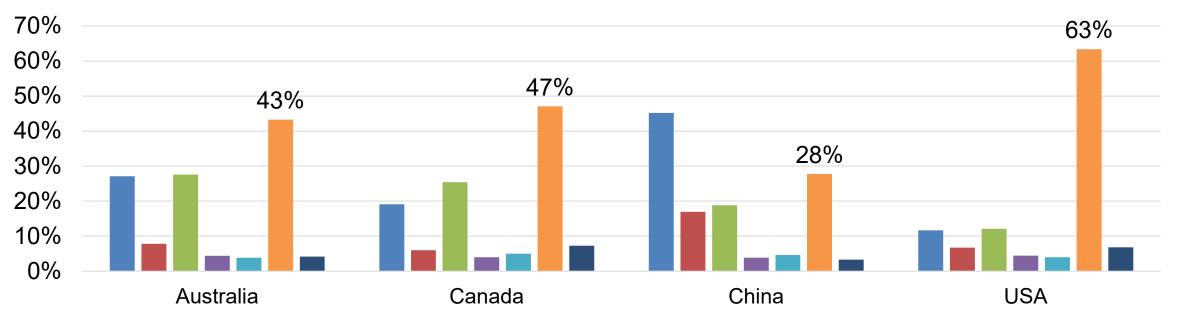


Source: Skift Research





### YouGov – Impact of COVID on Overseas Travel Plans



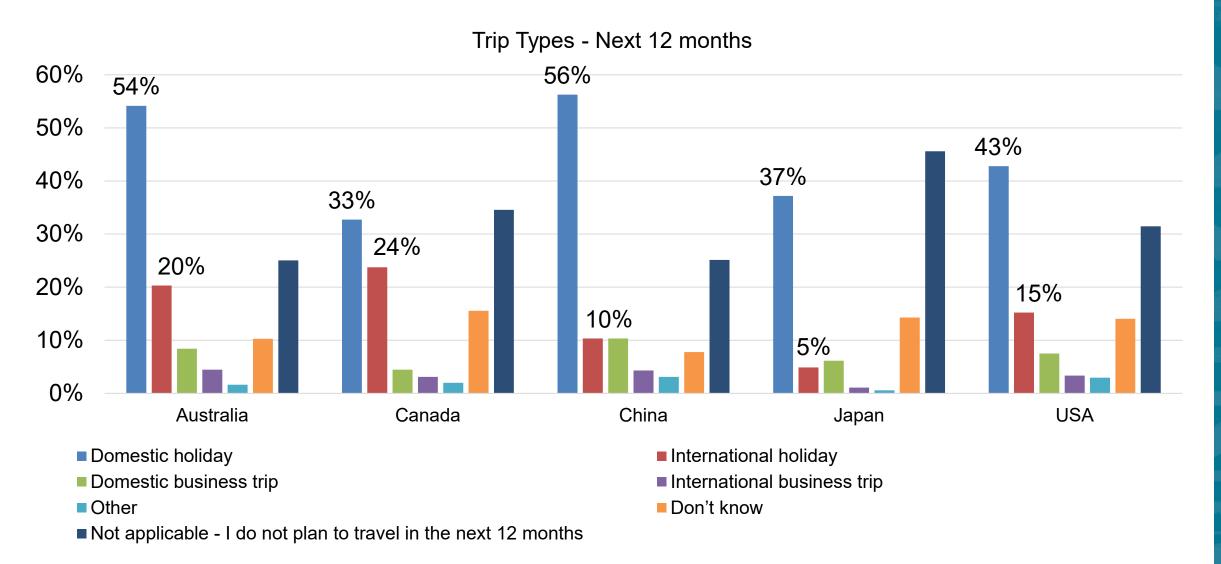
- I have already cancelled plans to travel overseas due to COVID-19
- I am considering cancelling future travel plans due to COVID-19
- I am delaying booking future travel due to COVID-19
- I am actively looking to travel overseas or have already booked overseas travel due to COVID-19
- I am planning to continue my arranged overseas travel plans
- Not applicable I did not and do not have any plans to travel overseas
- None of the above

Source: YouGov Global Travel Profiles





#### YouGov – Planned Trip Types

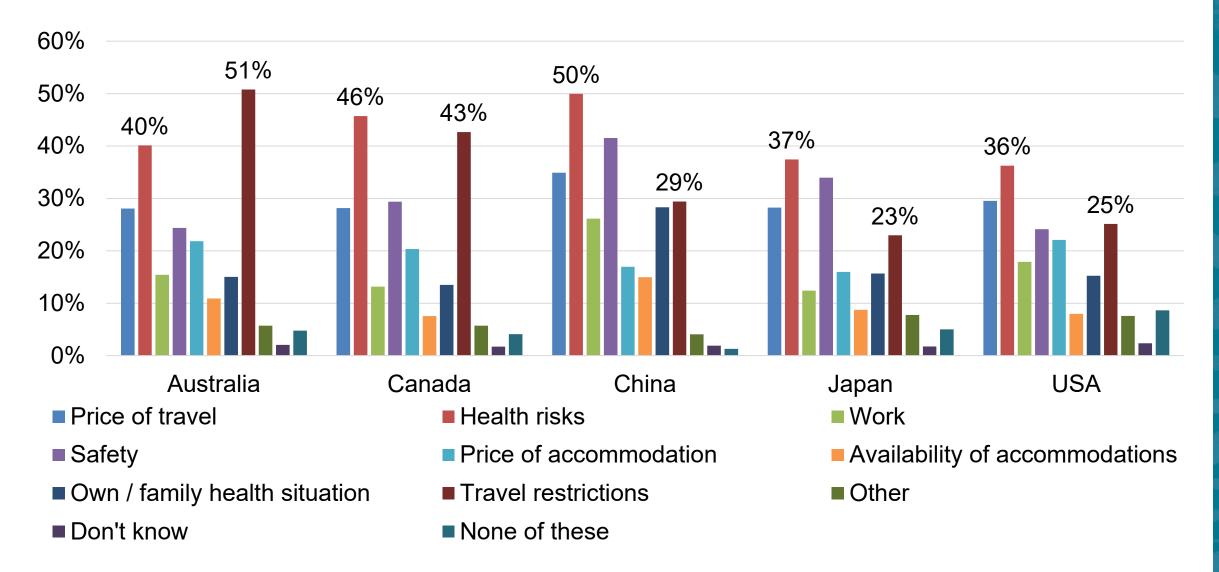


Source: YouGov Global Travel Profiles





#### YouGov – Travel Obstacles



Source: YouGov Global Travel Profiles



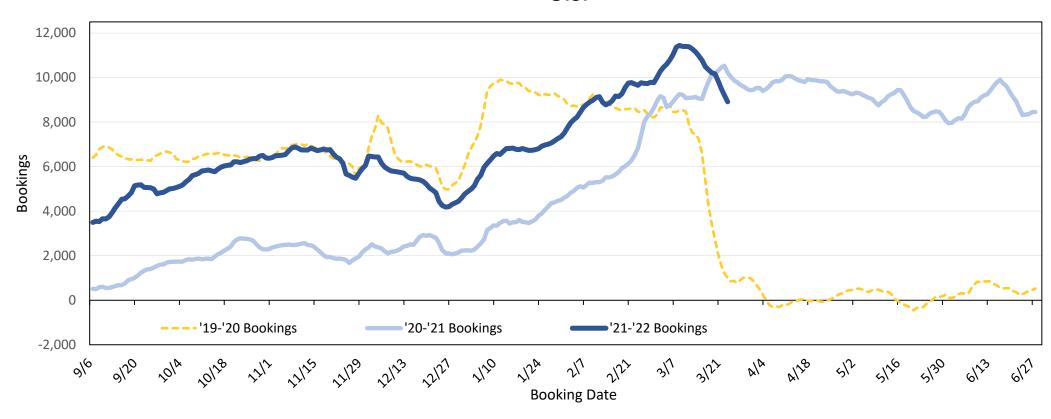


## TRAVEL AGENCY BOOKING TRENDS





Travel Agency Bookings to Hawaii for Future Arrivals\*
Based on a 7-day Moving Average as of March 27, 2022
U.S.



<sup>\*</sup>Future Arrivals refers to all 'future' arrivals relative to a given Booking Date. Source: Global Agency Pro

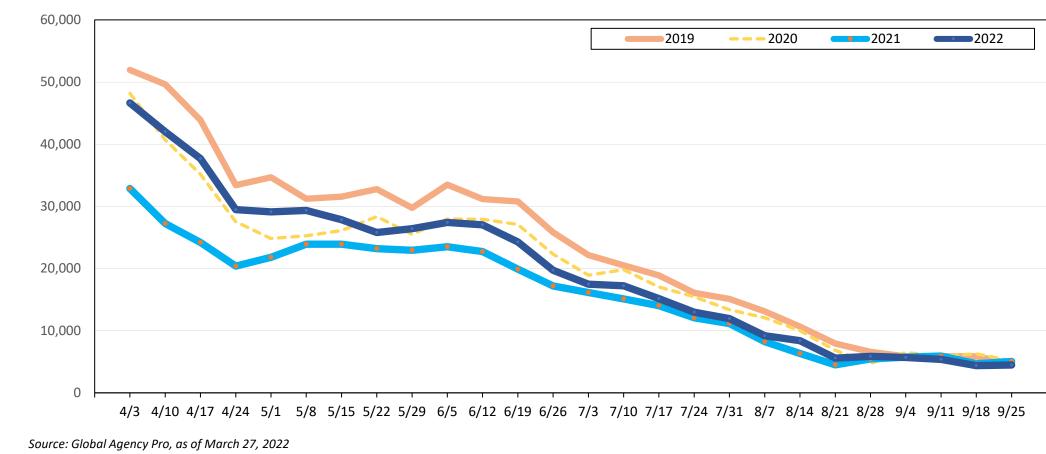
Source: Global Agency Pro





Update: Mar 27, 2022



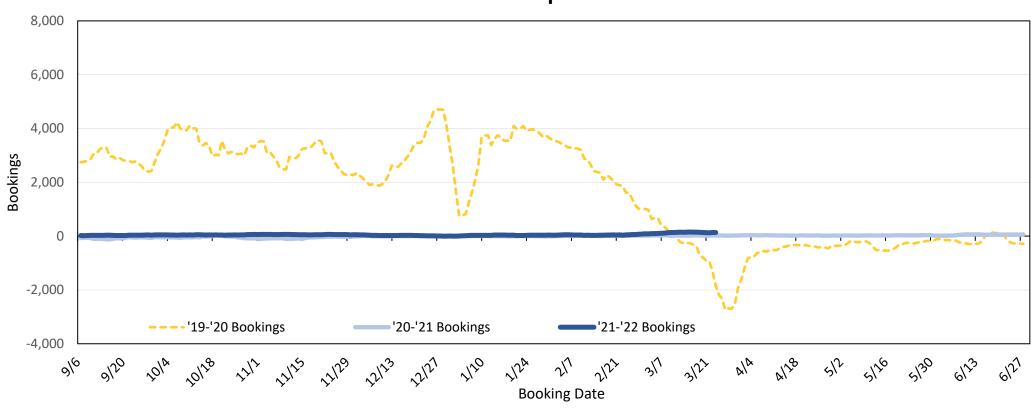


Source: Global Agency Pro





Travel Agency Bookings to Hawaii for Future Arrivals\*
Based on a 7-day Moving Average as of March 27, 2022
Japan



<sup>\*</sup>Future Arrivals refers to all 'future' arrivals relative to a given Booking Date. Source: Global Agency Pro

Source: Global Agency Pro

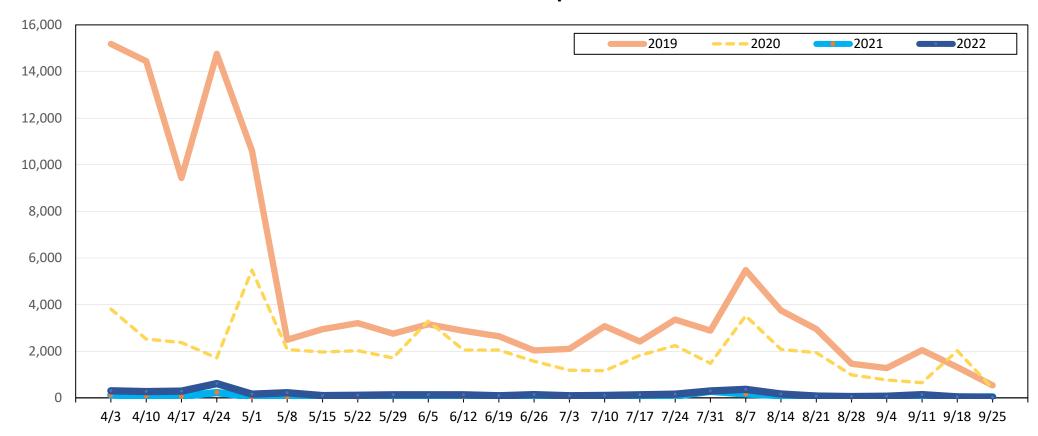




Update: Mar 27, 2022

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of March 27, 2022

Japan



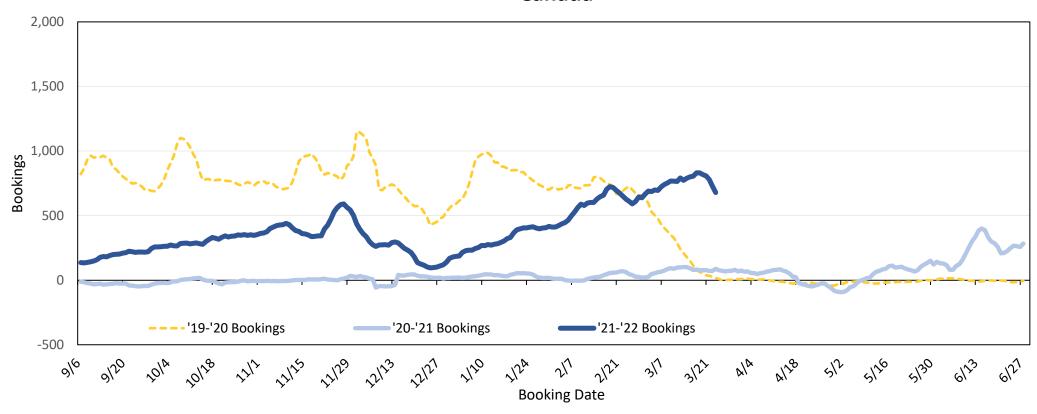
Source: Global Agency Pro, as of March 27, 2022

Source: Global Agency Pro





Travel Agency Bookings to Hawaii for Future Arrivals\*
Based on a 7-day Moving Average as of March 27, 2022
Canada



\*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date. Source: Global Agency Pro

Source: Global Agency Pro

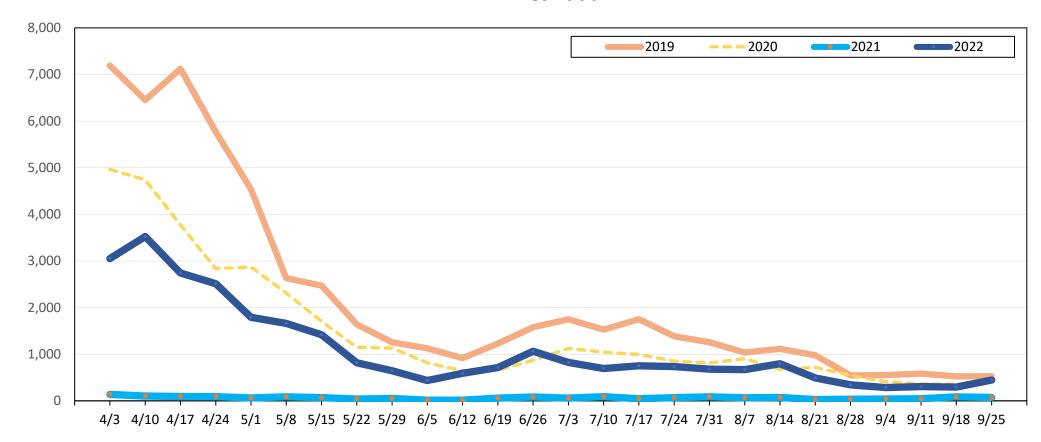
**DBEDT** 



Update: Mar 27, 2022

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of March 27, 2022

Canada



Source: Global Agency Pro, as of March 27, 2022

Source: Global Agency Pro





Travel Agency Bookings to Hawaii for Future Arrivals\*
Based on a 7-day Moving Average as of March 27, 2022
Korea



\*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date. Source: Global Agency Pro

Source: Global Agency Pro

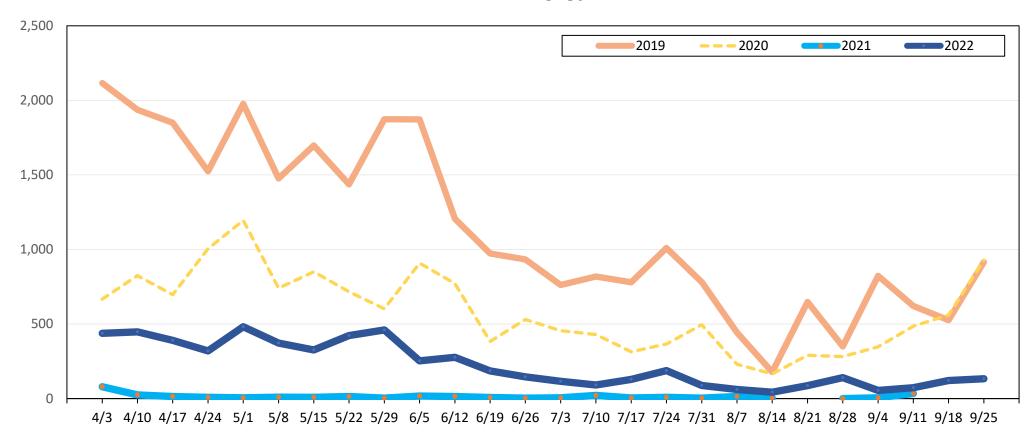




Update: Mar 27, 2022

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of March 27, 2022

Korea



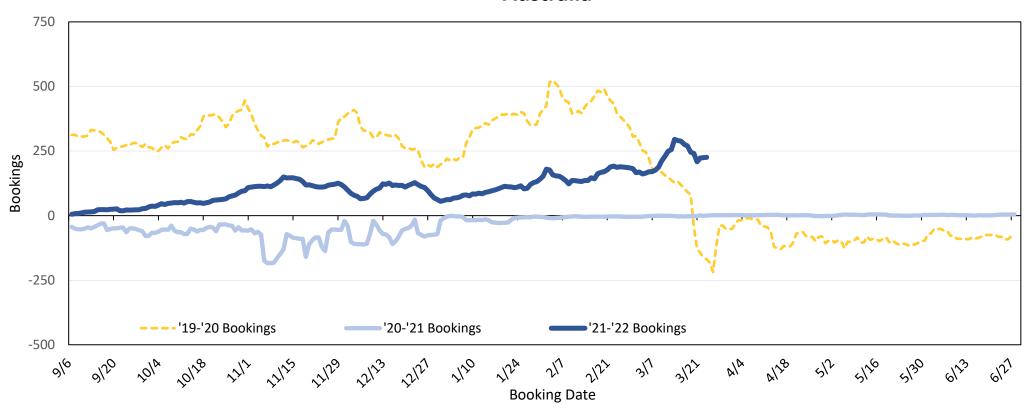
Source: Global Agency Pro, as of March 27, 2022

Source: Global Agency Pro





Travel Agency Bookings to Hawaii for Future Arrivals\*
Based on a 7-day Moving Average as of March 27, 2022
Australia



<sup>\*</sup>Future Arrivals refers to all 'future' arrivals relative to a given Booking Date. Source: Global Agency Pro

Source: Global Agency Pro

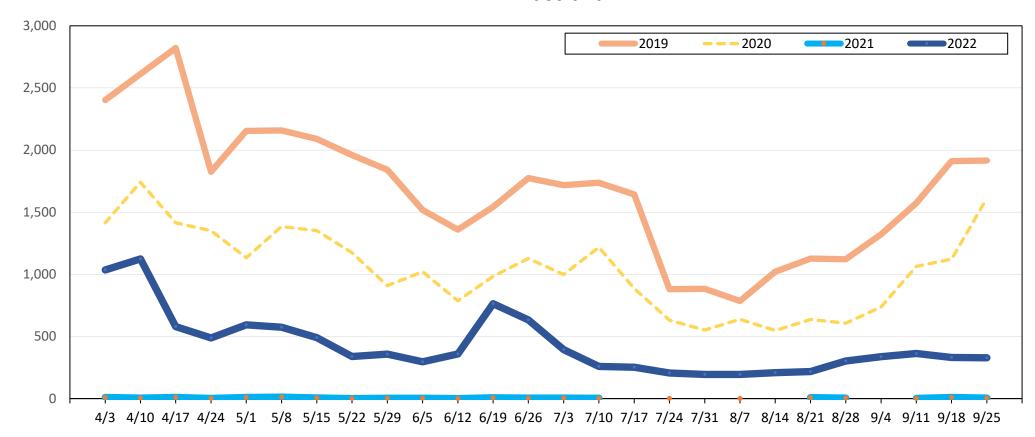
DBEDT



Update: Mar 27, 2022

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of March 27, 2022

Australia



Source: Global Agency Pro, as of March 27, 2022

Source: Global Agency Pro





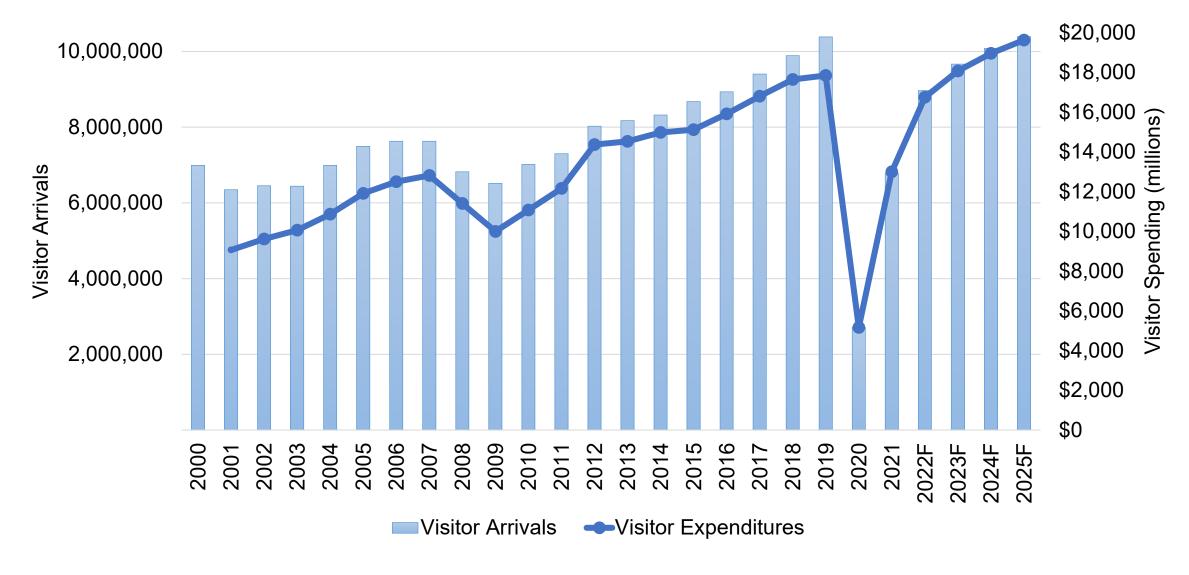
# DBEDT TOURISM FORECAST

Q1 2022





#### DBEDT Tourism Forecast – Q1 2022



Source: State of Hawaii Department of Business, Economic Development and Tourism





## DBEDT Tourism Forecast - Expenditures

CATEGORY AND MMA	2022F	2019	% change	2022F	2021	% change
TOTAL EXPENDITURES (\$mil.)	16,665.6	17,716.1	-5.9%	16,665.6	12,995.7	28.2%
Total by air	16,620.5	17,657.7	-5.9%	16,620.5	12,995.7	27.9%
U.S. Total	13,988.8	11,636.2	20.2%	13,988.8	12,227.0	14.4%
U.S. West	8,781.5	6,952.0	26.3%	8,781.5	7,933.3	10.7%
U.S. East	5,207.4	4,684.2	11.2%	5,207.4	4,293.7	21.3%
Japan	805.1	2,248.3	-64.2%	805.1	82.9	871.7%
Canada	426.6	1,081.5	-60.6%	426.6	238.4	79.0%
All Others	1,399.9	2,691.7	-48.0%	1,399.9	447.5	212.8%
Visitor arrivals by cruise ships	45.1	58.4	-22.7%	45.1	0.0	NA

Source: State of Hawaii Department of Business, Economic Development and Tourism





#### DBEDT Tourism Forecast – Visitor Arrivals

CATEGORY AND MMA	2022F	2019	% change	2022F	2021	% change
VISITOR ARRIVALS	8,969,000	10,386,673	-13.6%	8,969,000	6,777,498	32.3%
Total by air	8,867,698	10,243,165	-13.4%	8,867,698	6,777,498	30.8%
U.S. Total	7,666,485	6,871,839	11.6%	7,666,485	6,465,360	18.6%
U.S. West	5,183,426	4,595,319	12.8%	5,183,426	4,474,027	15.9%
U.S. East	2,483,059	2,276,520	9.1%	2,483,059	1,991,333	24.7%
Japan	521,380	1,576,205	-66.9%	521,380	24,232	2051.6%
Canada	194,619	540,103	-64.0%	194,619	86,491	125.0%
All Others	485,213.4	1,255,018.0	-61.3%	485,213.4	201,415.0	140.9%
Visitor arrivals by cruise ships	101,302	143,508	-29.4%	101,302	0	NA

Source: State of Hawaii Department of Business, Economic Development and Tourism





## SYMPHONY DASHBOARD UPDATES





#### Visitation Insights Dashboards

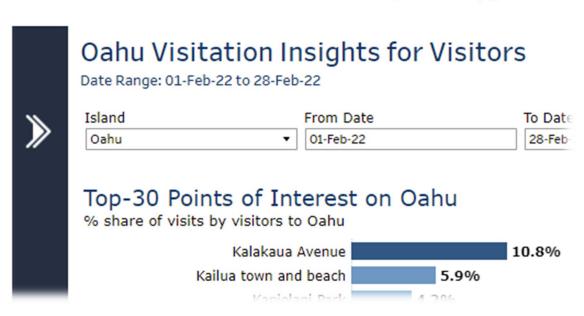
#### Visitation Insights Dashboards

Please click the arrow to the left to toggle between Visitation Insights for \

Visitor Points of Interest: Please select the island and dates that you want visitation lists.

Resident Points of Interest: Please select the island, county of residency, are to generate cross visitation lists.

Visits to Points of Interest: Please select the island, POI name(s), and dates



https://www.hawaiitourismauthority.org/research/symphony-dashboards/

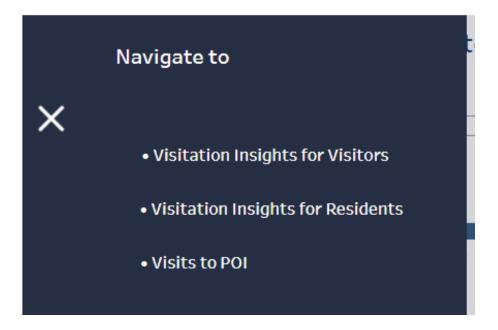
#### Visitation Insights Dashboards

Please click the arrow to the left to toggle between Visitation In

Visitor Points of Interest: Please select the island and dates tha visitation lists.

Resident Points of Interest: Please select the island, county of reto generate cross visitation lists.

Visits to Points of Interest: Please select the island, POI name(s







#### Visits to Point of Interest (POI)

Date Range: 01-Feb-22 to 28-Feb-22



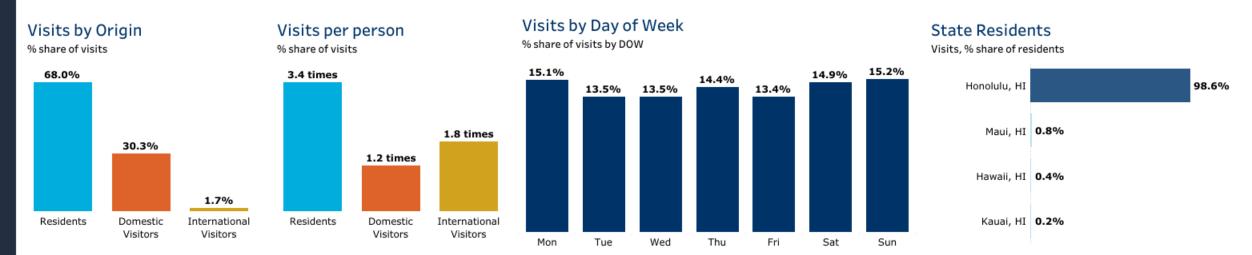




Island POI Name From Date Oahu Diamond Head State Monum.. 01-Feb-22

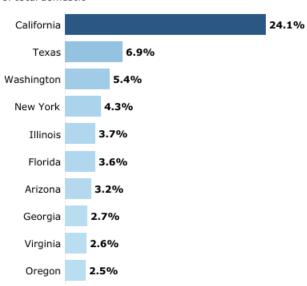
To Date 28-Feb-22

Sample Size: 3,689



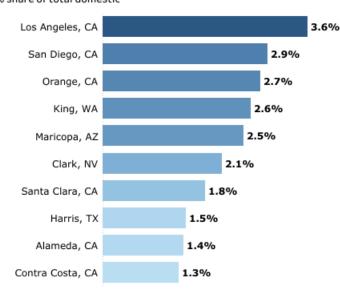
#### Top-10 Origin States for Domestic Visits

Visits, % share of total domestic



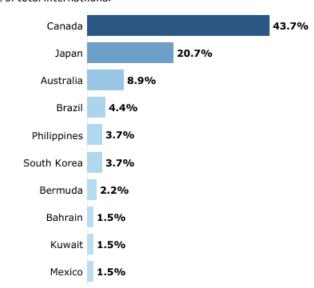
#### Top-10 Origin Counties for Domestic Visits

Visits, % share of total domestic



Top-10 Origin Countries for International Visits

Visits, % share of total international



#### Visits to Point of Interest (POI)

Date Range: 01-Feb-22 to 28-Feb-22

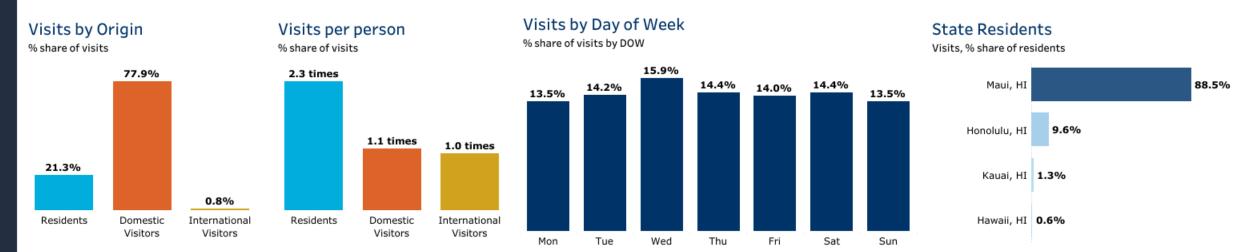






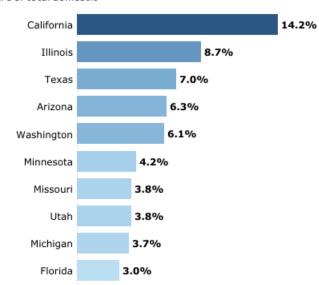
Island Maui Island POI Name Waianapanapa State Park From Date 01-Feb-22 To Date 28-Feb-22

Sample Size: 607



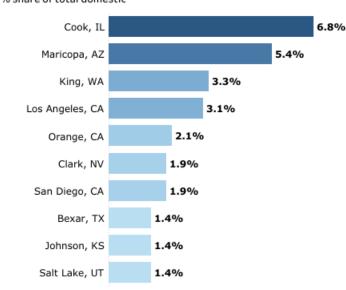
#### Top-10 Origin States for Domestic Visits

Visits, % share of total domestic



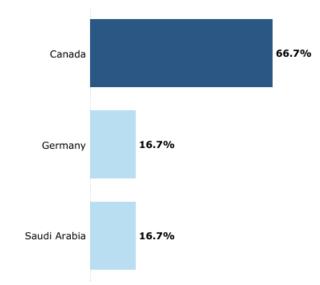
#### Top-10 Origin Counties for Domestic Visits

Visits, % share of total domestic



Top-10 Origin Countries for International Visits

Visits, % share of total international



## MAHALO!



