HTA Winter Tourism Update

Tourism Update and Outlook

February 9, 2022

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Director of Tourism Research
UNWTO: Global Arrivals up 4%, but -72% vs. 2019

Source: UNWTO, Provisional Data (data as of January 2022)
UNWTO International Tourism Arrivals and Tourism Receipts 2000 - 2021

GLOBAL ECONOMIC CRISIS (2009):
ARRIVALS: -37 MILLION (-4%)
RECEIPTS: -US$ 80 BILL (-4%)

SARS EPIDEMIC (2003):
ARRIVALS: -2 MILLION (-0.4%)
RECEIPTS: +US$ 48 BILL (+2%)

COVID-19 PANDEMIC (2020):
ARRIVALS: -1.1 BILLION (-73%)
RECEIPTS: -US$ 930 BILL (-64%)

INT. TOURIST ARRIVALS (MILLIONS)
INT. TOURISM RECEIPTS (US$ BILLIONS)

Source: UNWTO, Provisional Data (data as of January 2022)
Historical Visitor Arrivals

Visitor Arrivals to the State of Hawai‘i 1970 - 2021

- '70-'91 U.S. Recession & Gulf War
- '92 Hurricane 'Iniki
- '95 Kobe Earthquake
- '97 Y2K
- '01-'02 U.S. Recession & 9/11
- '03 SARS
- '06 '07-'09 The Great Recession
- '11 Tohoku Earthquake, Tsunami
- ‘18 Kaua‘i Flooding Kilauea Eruption
- '18 Kaua‘i Flooding Kilauea Eruption
- '20 COVID-19 Pandemic

2021 data are preliminary

February 9, 2022
### Hawai‘i Tourism at a Glance

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</thead>
<tbody>
<tr>
<td><strong>Spending</strong></td>
<td>$14.52B</td>
<td>$14.97B (+3.1%)</td>
<td>$15.11B (+0.9%)</td>
<td>$15.91B (+5.3%)</td>
<td>$16.79B (+5.5%)</td>
<td>$17.64B (+5.1%)</td>
<td>$17.72B (+1.2%)</td>
<td>$4.63B² (-73.9%)</td>
<td>$13.0B (+180.6%)</td>
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<tr>
<td><strong>Tax Revenue</strong></td>
<td>$1.54B (+2.6%)</td>
<td>$1.71B (+7.0%)</td>
<td>$1.86B (+8.8%)</td>
<td>$1.96B (+5.4%)</td>
<td>$2.08B (+6.8%)</td>
<td>$2.07B (+1.2%)</td>
<td>$540.6M³ (-73.9%)</td>
<td>$1.52B (+180.6%)</td>
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<tr>
<td><strong>Jobs Supported</strong></td>
<td>168K (+3.6%)</td>
<td>174K (+1.7%)</td>
<td>194K (+9.6%)</td>
<td>205K (+5.7%)</td>
<td>217K (+6.8%)</td>
<td>216K (+0.6%)</td>
<td>56.4K³ (-73.9%)</td>
<td>158K (+180.6%)</td>
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<tr>
<td><strong>Arrivals</strong></td>
<td>8.17M (+1.8%)</td>
<td>8.68M (+4.3%)</td>
<td>8.93M (+2.9%)</td>
<td>9.40M (+5.3%)</td>
<td>9.95M (+5.9%)</td>
<td>10.39M (+5.0%)</td>
<td>2.71M (-73.9%)</td>
<td>6.78M (+150.3%)</td>
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<tr>
<td><strong>Air Seats</strong></td>
<td>10.9 M (+3.7%)</td>
<td>11.3M (+5.7%)</td>
<td>11.9M (+0.7%)</td>
<td>12.0M (+1.8%)</td>
<td>12.2M (+8.3%)</td>
<td>13.2M (+2.9%)</td>
<td>13.6M (-60.9%)</td>
<td>5.32M (+101.8%)</td>
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</tr>
</tbody>
</table>

¹ 2021 data are preliminary
² 2020 expenditures 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia, Oceania, Europe and Latin America, visitor spending data were only available from January-March 2020; data for November and December were not available due to limited samples 2020 expenditures do not include supplemental business spending
³2020 tax revenues and jobs were calculated based on available spending data from MMA countries detailed in footnote 2
Tourism Impacts by County – 2021P vs. 2019

2019

State of Hawai‘i:
$48.4 M per day
245,700 visitors per day

Maui County:
$14.5 M per day
67,900 visitors per day

Maui County:
$22.3 M per day
114,600 visitors per day

County of Maui
$11.3 M per day
44,467 visitors per day

State of Hawai‘i
$6.3 M per day
35,600 visitors per day

County of Maui
$3.8 M per day
19,187 visitors per day

2021P

State of Hawai‘i
$35.6 M per day
179,022 visitors per day

County of Maui
$15.5 M per day
73,923 visitors per day

County of Maui
$5.0 M per day
30,050 visitors per day

2021 data are preliminary
Visitor Arrival Mix 2021P vs 2019

Note: 2021 figures are preliminary.

2019

- U.S. West: 4,595,319 (44.2%)
- U.S. East: 2,276,520 (21.9%)
- Japan: 1,576,205 (15.2%)
- Canada: 540,103 (5.2%)

2021P

- U.S. East: 1,991,333 (29.4%)
- U.S. West: 4,474,027 (66.0%)
- Japan: 24,232 (0.4%)
- Canada: 86,491 (1.3%)
Visitor Spending Mix 2021P vs 2019

Note: 2021 figures are preliminary.

<table>
<thead>
<tr>
<th>Region</th>
<th>2019</th>
<th>2021P</th>
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<tbody>
<tr>
<td>U.S. West</td>
<td>$6,952.0</td>
<td>$7,933.3</td>
</tr>
<tr>
<td>U.S. East</td>
<td>$4,684.2</td>
<td>$4,293.7</td>
</tr>
<tr>
<td>Japan</td>
<td>$2,248.3</td>
<td>$82.9</td>
</tr>
<tr>
<td>Canada</td>
<td>$1,081.5</td>
<td>$238.4</td>
</tr>
</tbody>
</table>

2019:
- U.S. West: 39.2%
- U.S. East: 26.4%
- Japan: 12.7%
- Canada: 6.1%

2021P:
- U.S. West: 61.0%
- U.S. East: 33.0%
- Japan: 0.6%
- Canada: 1.8%
Personal Daily Spending – 2021P vs. 2019

2021 data are preliminary.

- Total by air: $198.9 vs. $196.9
- U.S. West: $193.9 vs. $174.9
- U.S. East: $211.4 vs. $212.6
- Japan: $218.9 vs. $241.6
- Canada: $178.1 vs. $165.0

2021 data are preliminary.
Spending by Category 2021P vs 2019

Note: 2021 figures are preliminary.
Average Length of Stay – 2021P vs. 2019

2021 data are preliminary.

- **Total by air**: 9.6 (2021P) vs. 8.8 (2019)
- **U.S. West**: 9.1 (2021P) vs. 8.7 (2019)
- **U.S. East**: 10.2 (2021P) vs. 9.7 (2019)
- **Japan**: 15.6 (2021P) vs. 5.9 (2019)
- **Canada**: 15.5 (2021P) vs. 12.1 (2019)
UNWTO: Optimism for 2022, but Recovery Far Off

2022 Outlook

Recovery to 2019 Levels

Source: UNWTO Panel of Experts, January 2022 Survey
DBEDT Tourism Forecast

Source: DBEDT
MAHALO!