

# HTA Winter Tourism Update

## *Tourism Update and Outlook*

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HAWAII TOURISM  
AUTHORITY

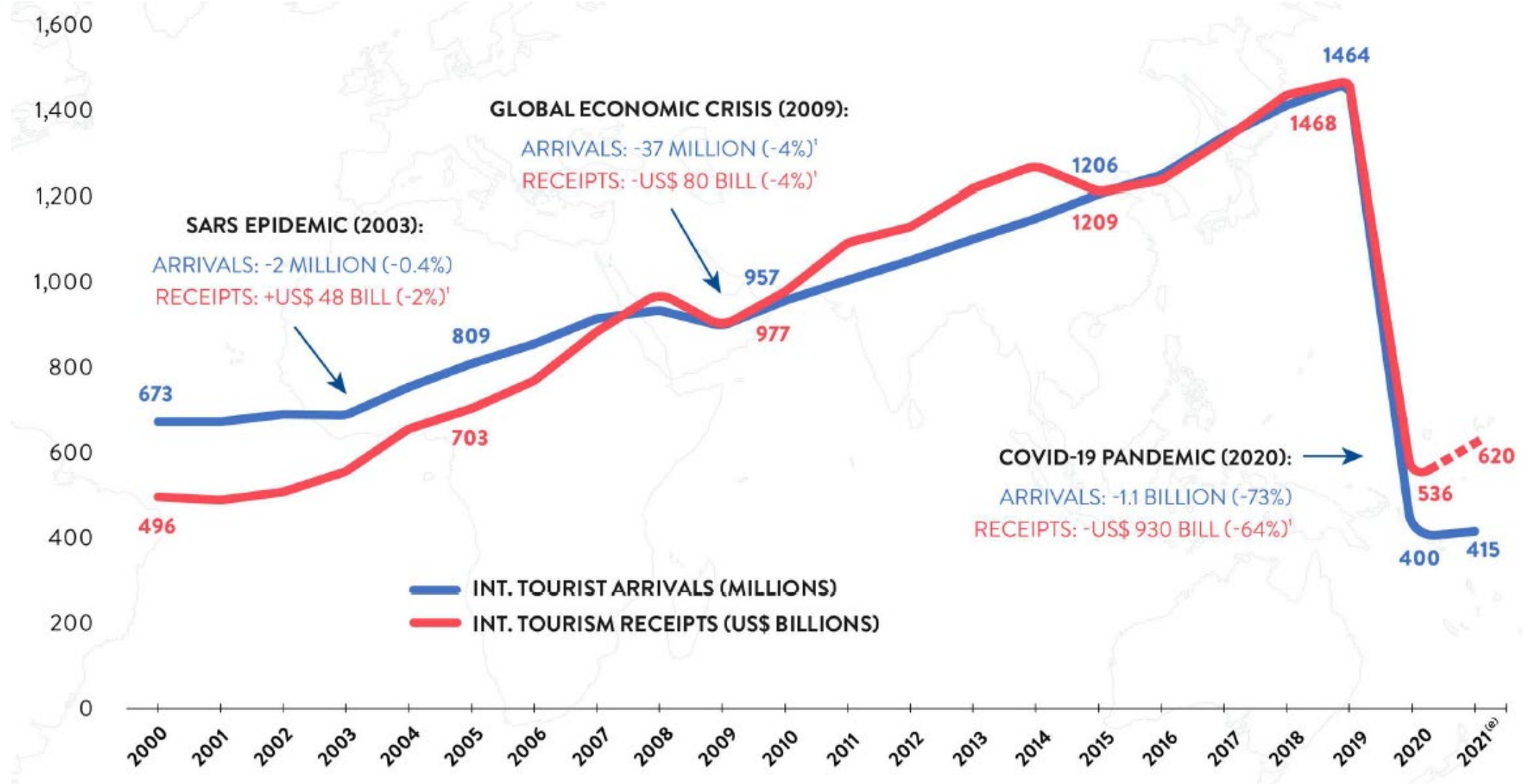


# UNWTO: Global Arrivals up 4%, but -72% vs. 2019



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

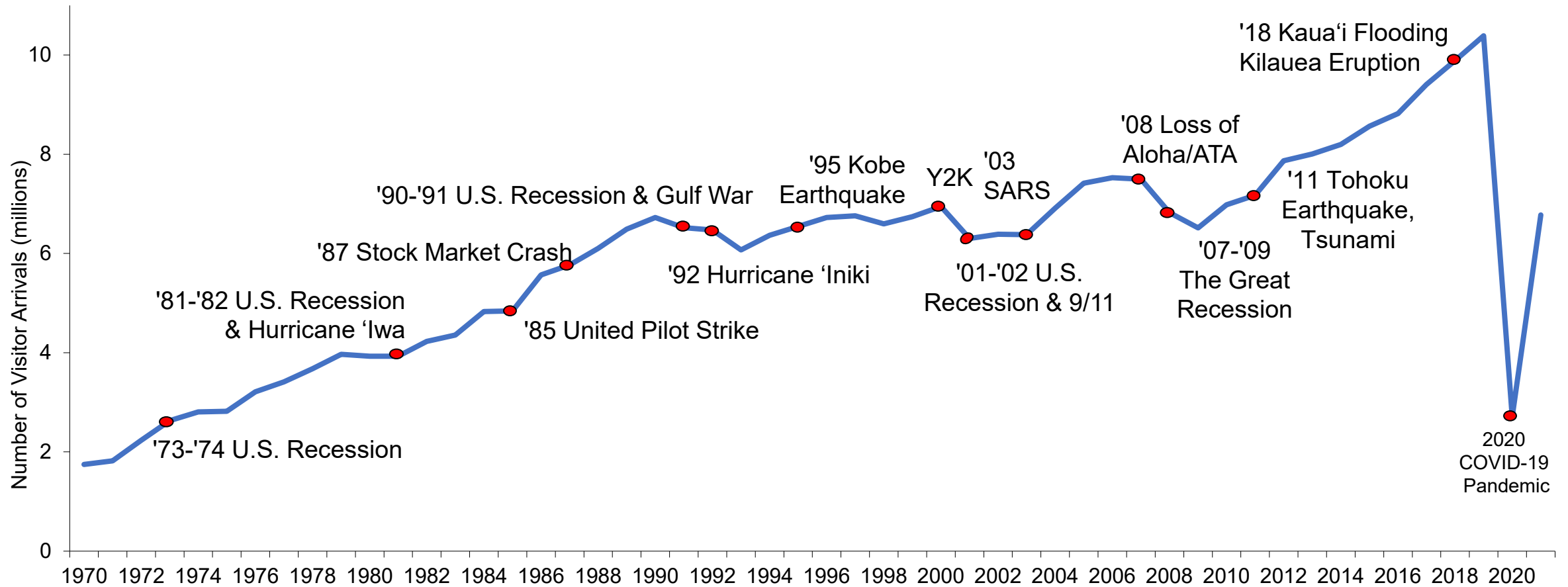
# UNWTO International Tourism Arrivals and Tourism Receipts 2000 - 2021



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

# Historical Visitor Arrivals

**Visitor Arrivals to the State of Hawai'i 1970 - 2021**



2021 data are preliminary

# Hawai'i Tourism at a Glance

	2013	2014	2015	2016	2017R	2018	2019	2020	2021P <sup>1</sup>
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$17.72B (+1.2%)	\$4.63B <sup>2</sup> (-73.9%)	\$13.0B (+180.6%)
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8)	\$2.07B (+1.2%)	\$540.6M <sup>3</sup> (-73.9%)	\$1.52B (+180.6%)
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	216K (+0.6%)	56.4K <sup>3</sup> (-73.9%)	158K (+180.6%)
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	10.39M (+5.0%)	2.71M (-73.9%)	6.78M (+150.3%)
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	13.6M (+2.9%)	5.32M (-60.9%)	10.74M (+101.8%)

<sup>1</sup> 2021 data are preliminary

<sup>2</sup> 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

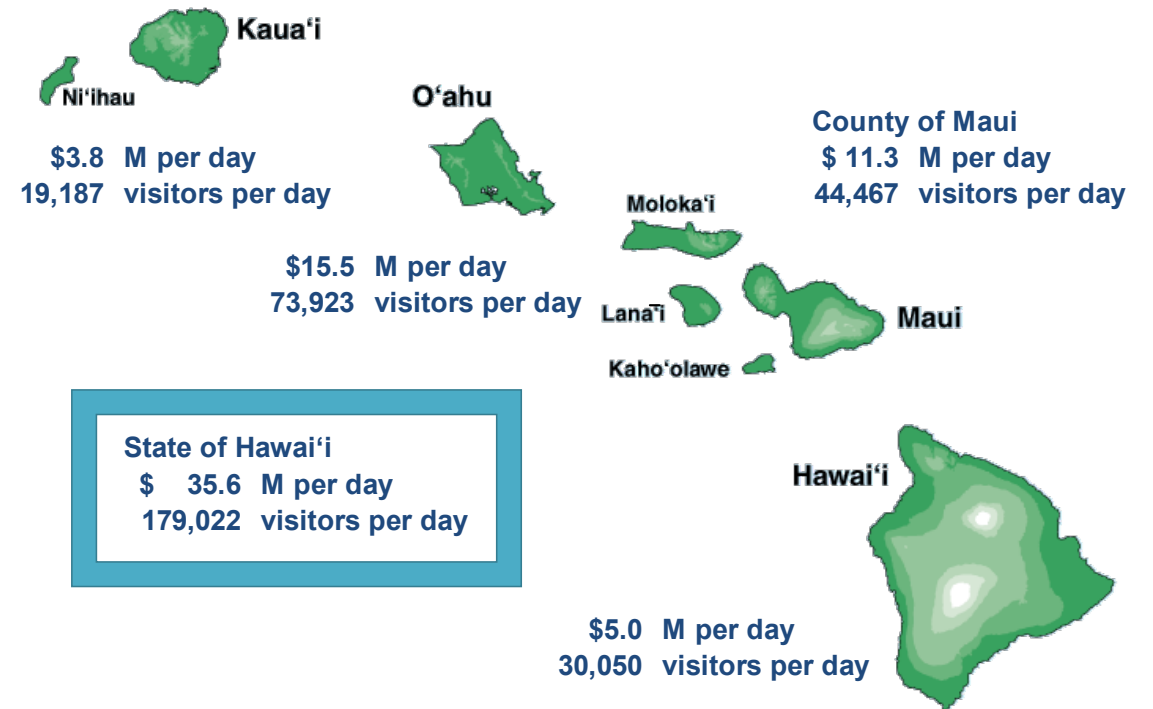
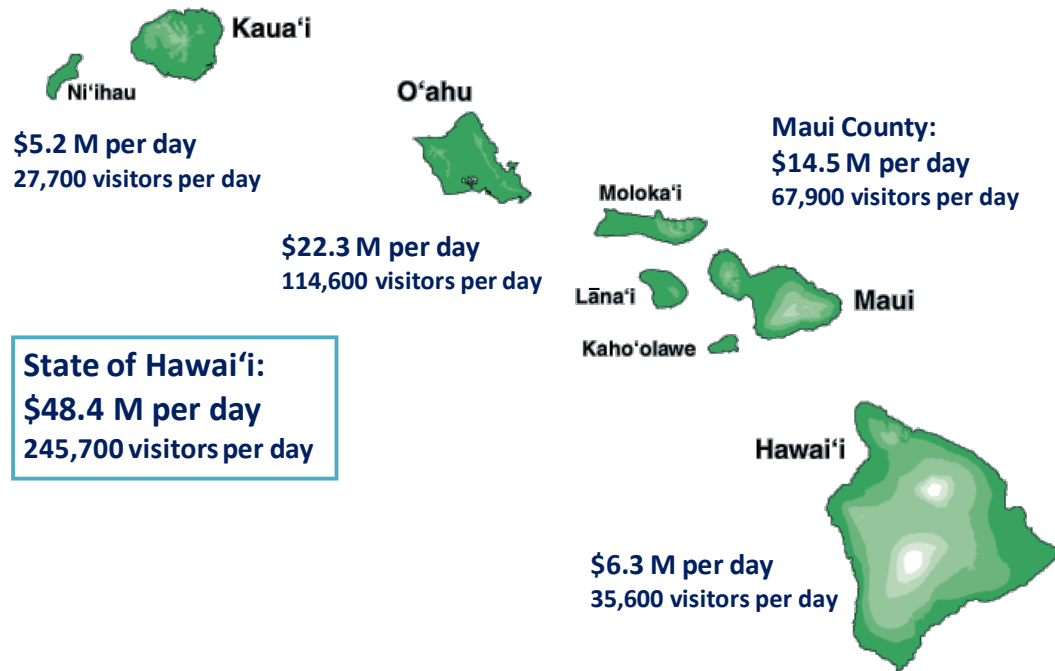
<sup>3</sup>2020 tax revenues and jobs were calculated based on available spending data from MMA countries detailed in footnote 2



# Tourism Impacts by County – 2021P vs. 2019

2019

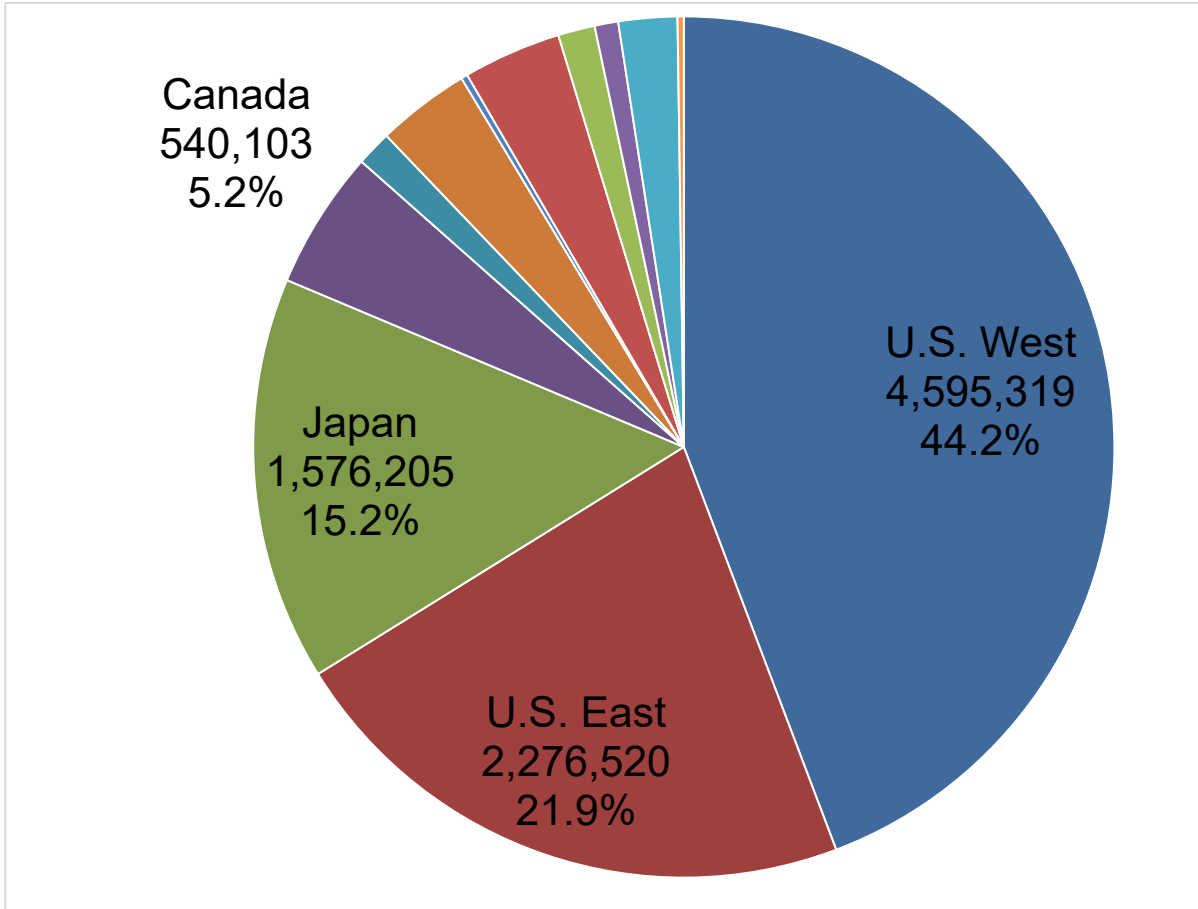
2021P



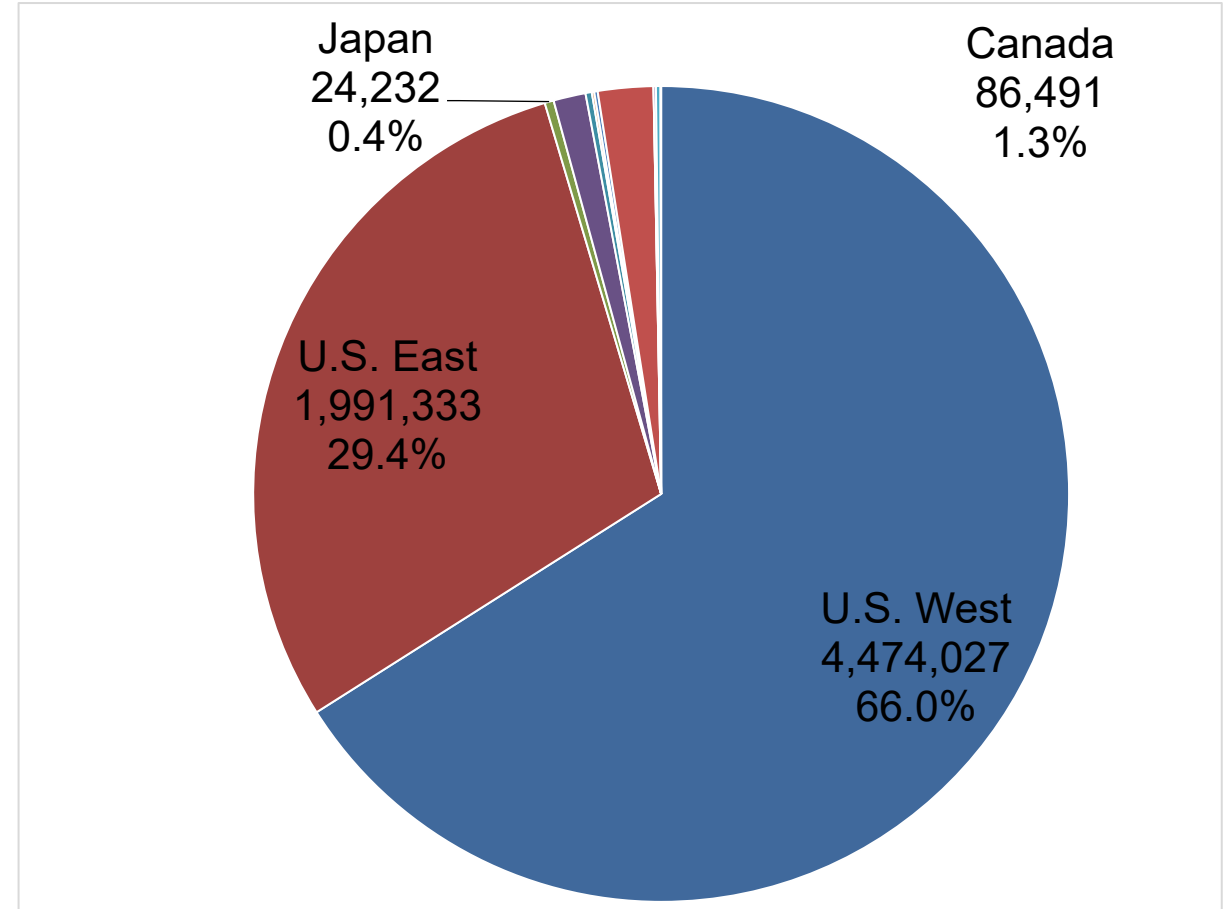
2021 data are preliminary

# Visitor Arrival Mix 2021P vs 2019

2019



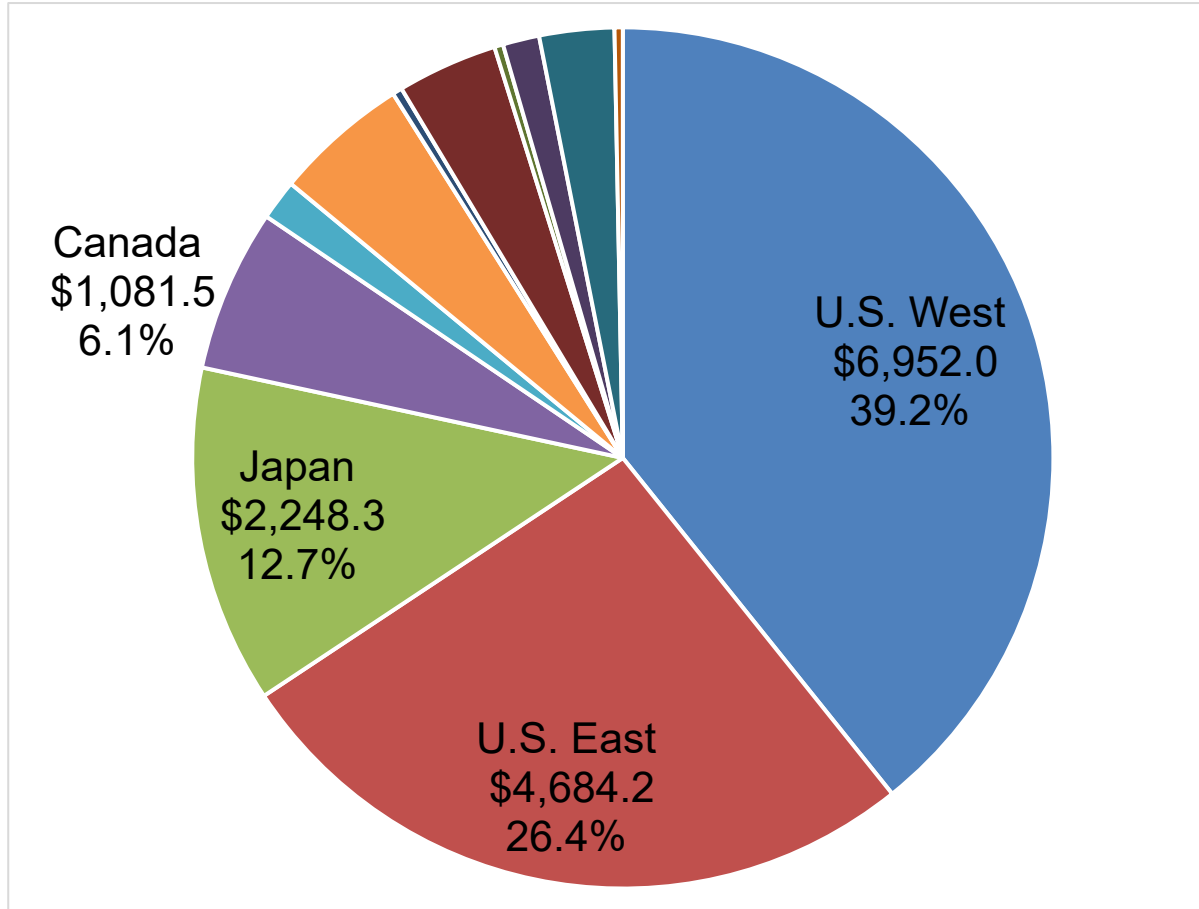
2021P



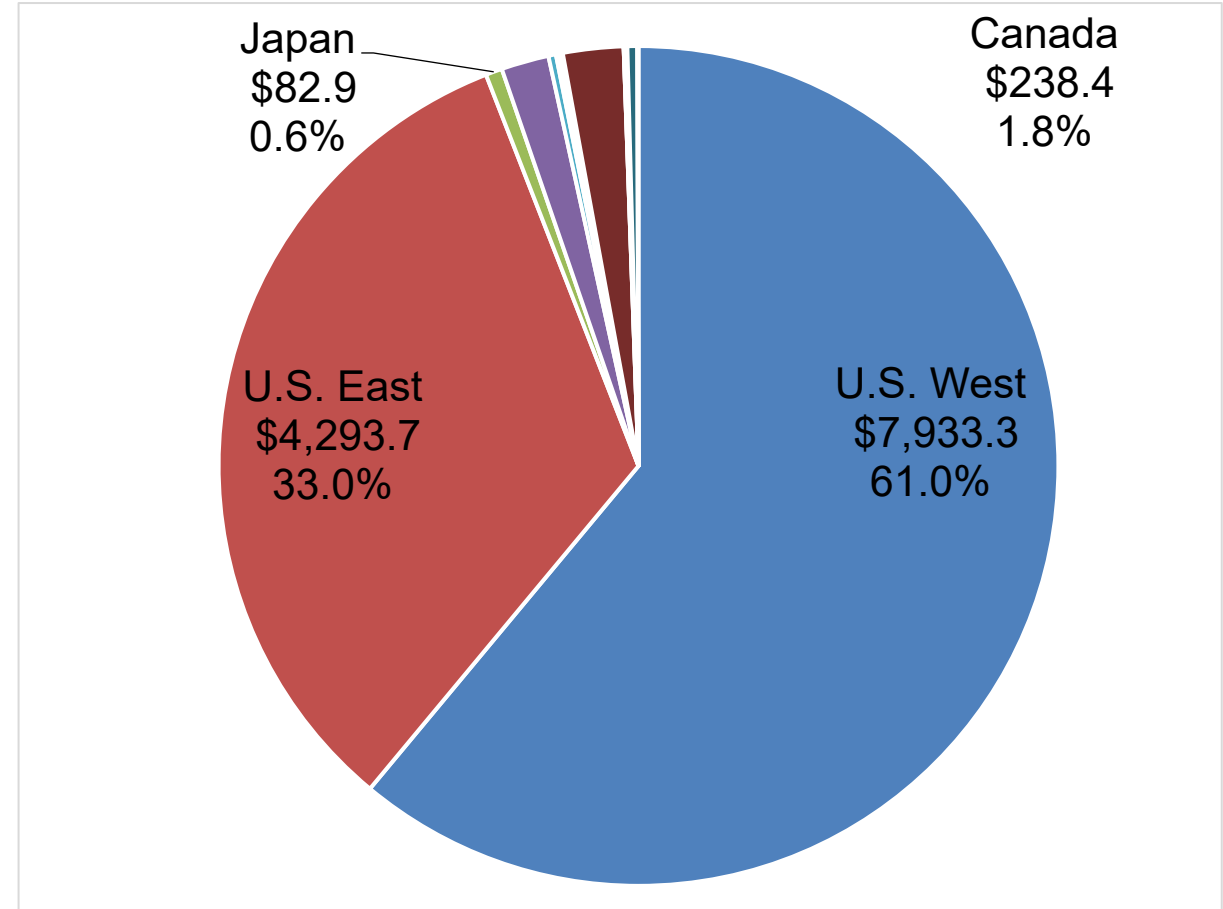
Note: 2021 figures are preliminary.

# Visitor Spending Mix 2021P vs 2019

2019



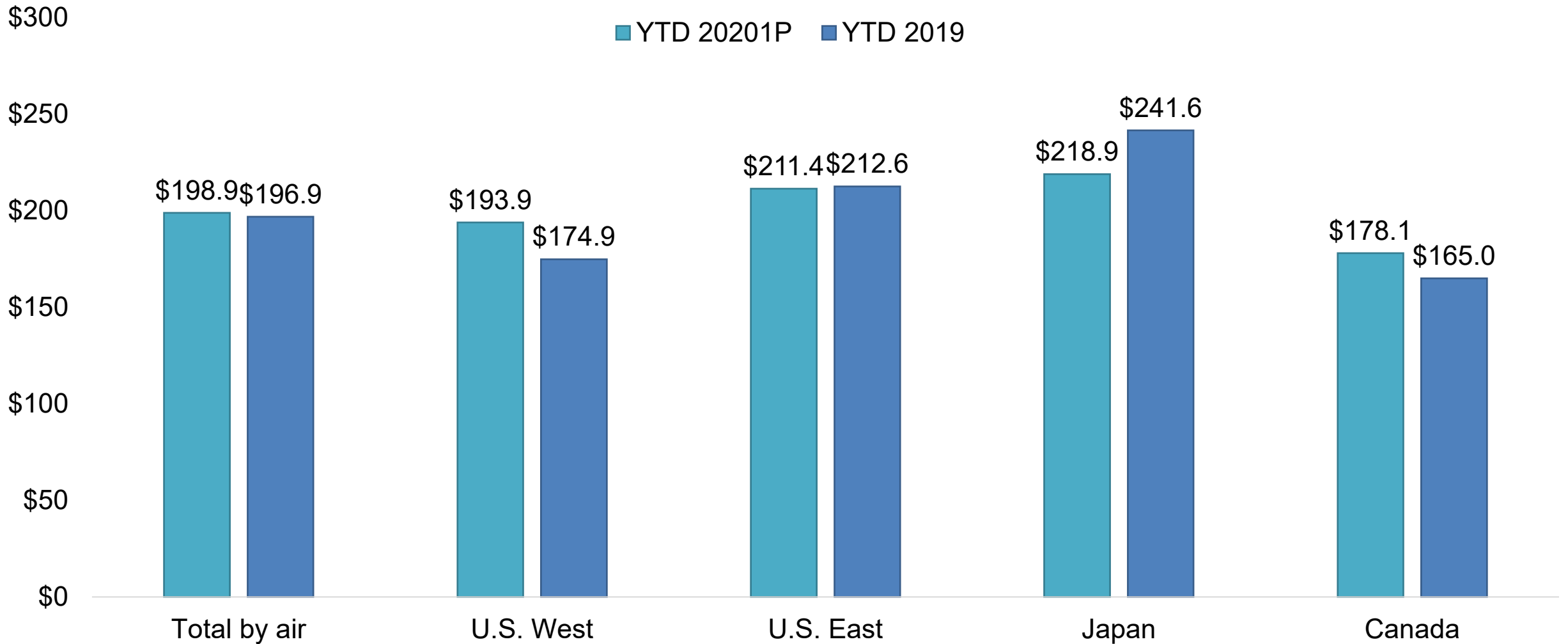
2021P



Note: 2021 figures are preliminary.

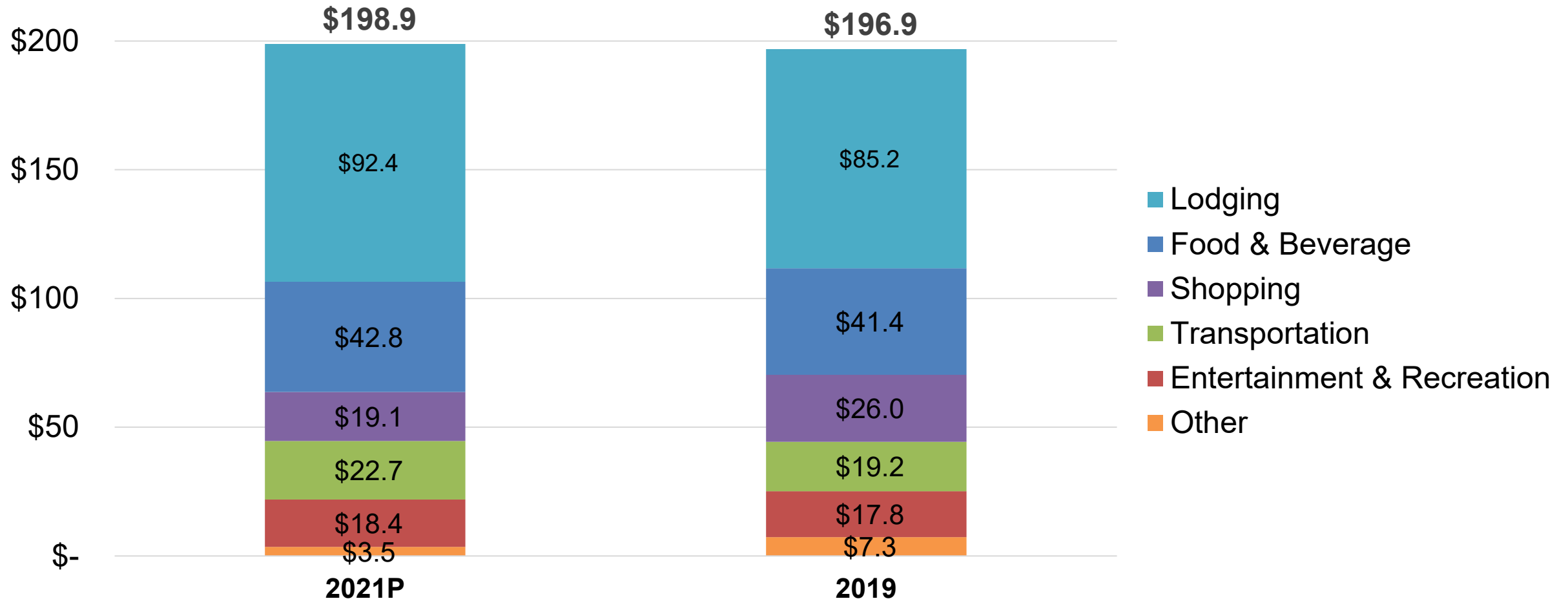


# Personal Daily Spending – 2021P vs. 2019



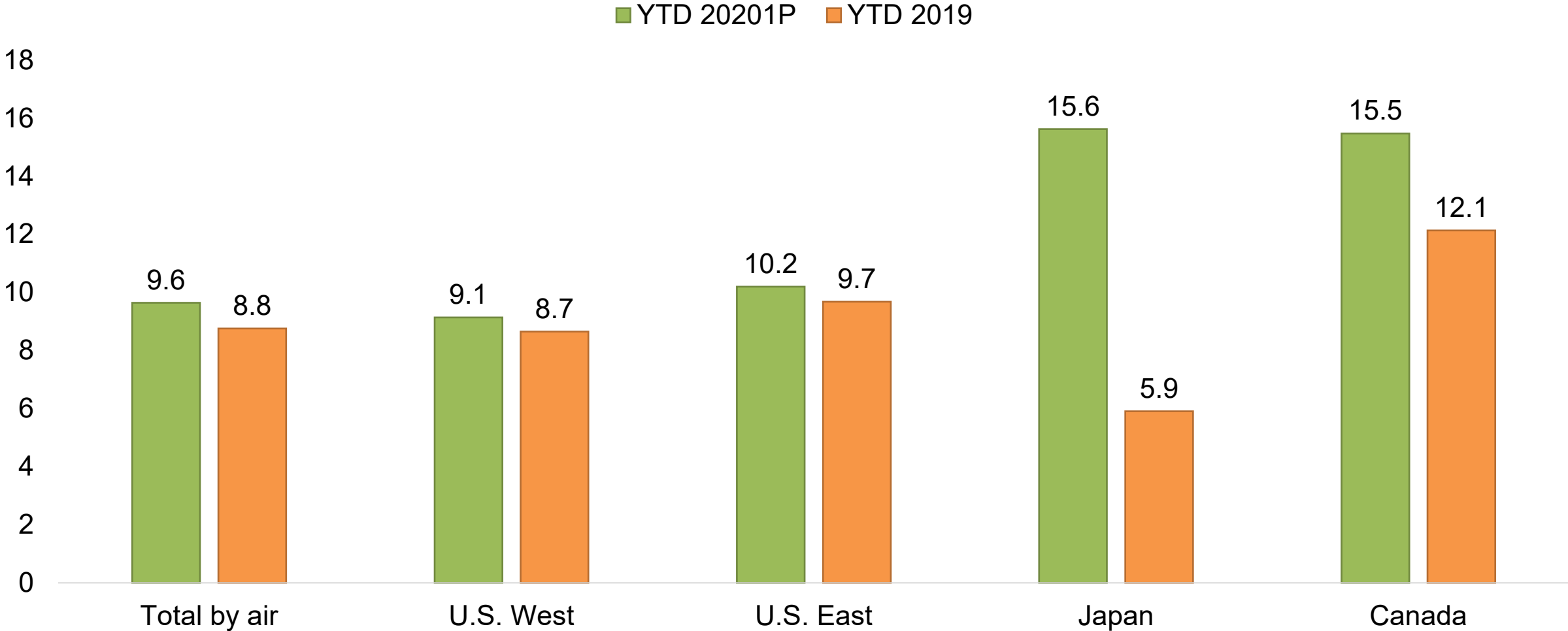
2021 data are preliminary.

# Spending by Category 2021P vs 2019



Note: 2021 figures are preliminary.

# Average Length of Stay – 2021P vs. 2019

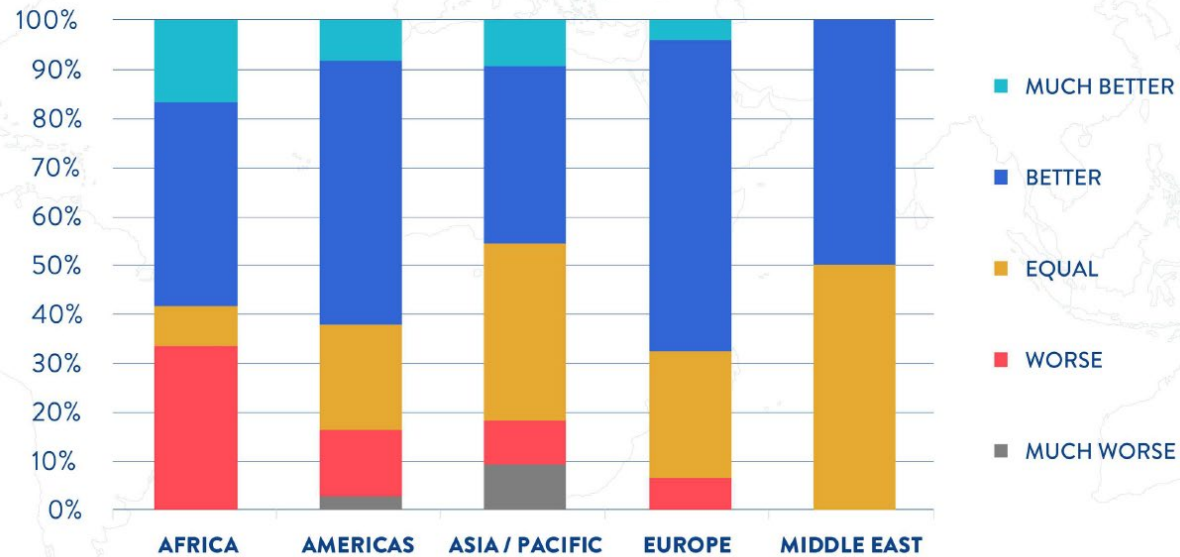


2021 data are preliminary.

# UNWTO: Optimism for 2022, but Recovery Far Off

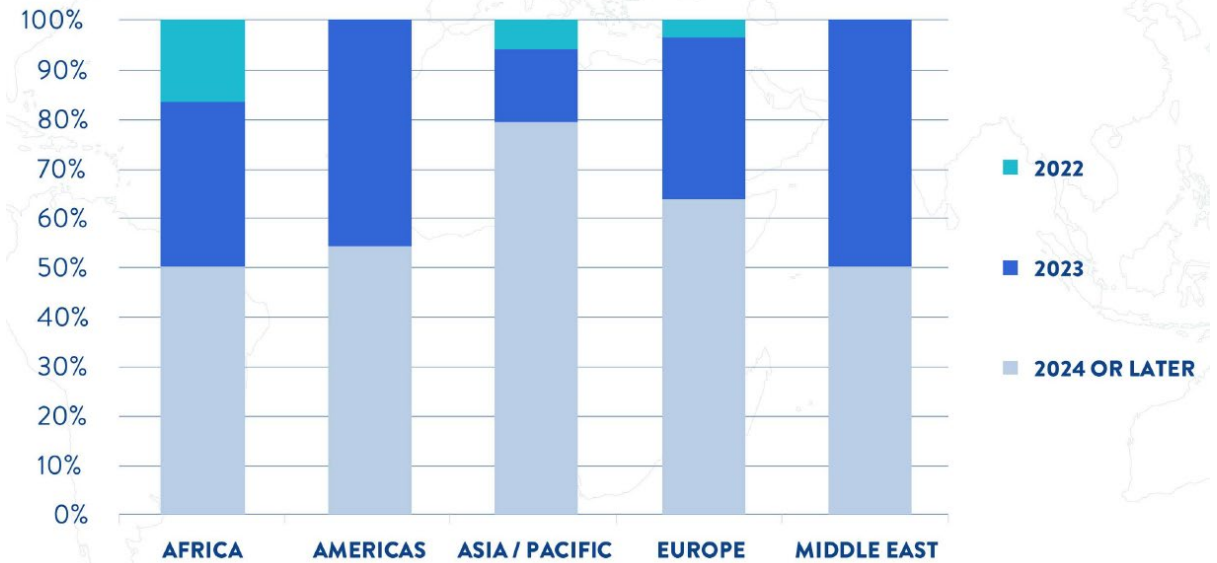
## 2022 Outlook

WHAT ARE YOUR PROSPECTS FOR TOURISM PERFORMANCE IN YOUR DESTINATION OR BUSINESS IN 2022 AS COMPARED TO 2021?



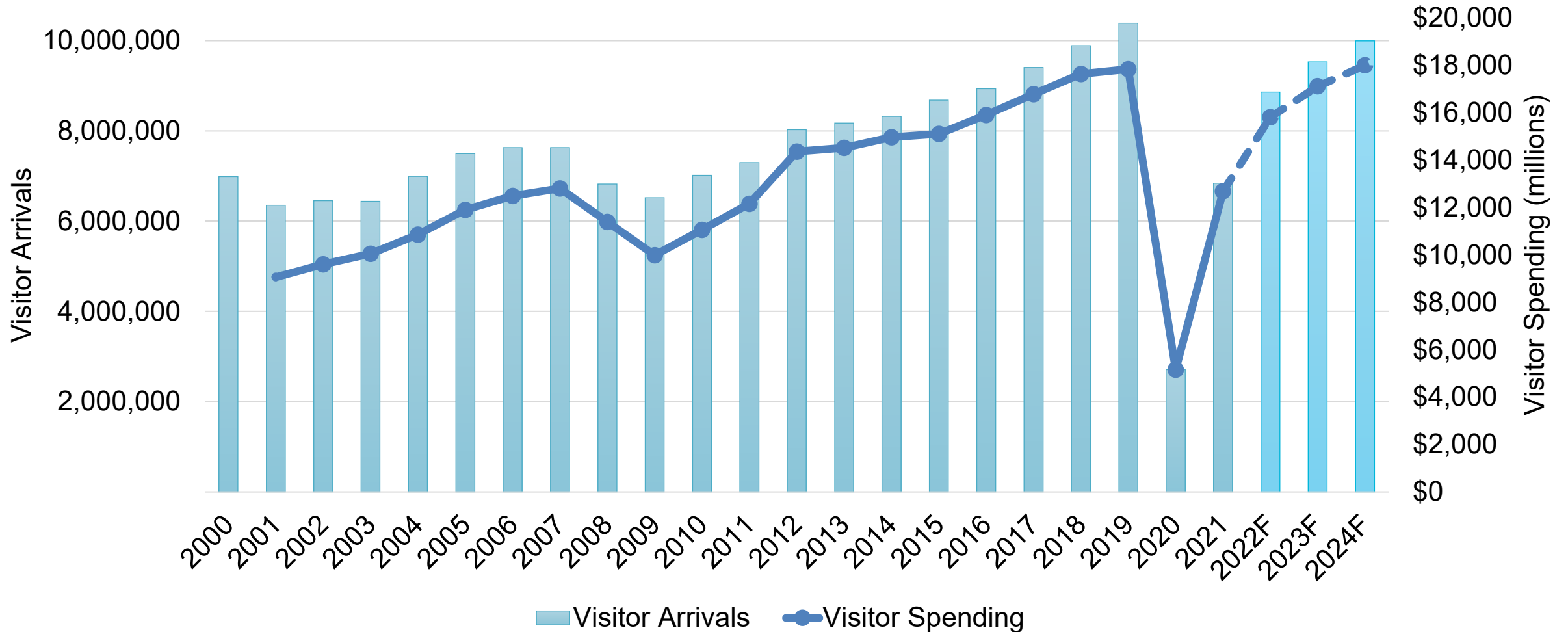
## Recovery to 2019 Levels

WHEN DO YOU EXPECT INTERNATIONAL TOURISM TO RETURN TO PRE-PANDEMIC 2019 LEVELS IN YOUR COUNTRY?



Source: UNWTO Panel of Experts, January 2022 Survey

# DBEDT Tourism Forecast



Source: DBEDT

# MAHALO!

