

HTA REGULAR BOARD MEETING

Thursday, April 28, 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

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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 text 'STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM' is written in a smaller, white, sans-serif font.

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

March 2022 Highlights

EXPENDITURES (\$mil.)	2022P	2021P	2019
TOTAL (AIR)	1,524.6	766.9	1,484.9
U.S. West	805.5	492.4	578.1
U.S. East	507.0	249.8	404.5
Japan	11.8	3.7	185.2
Canada	116.1	1.1	139.8
All Others	84.3	19.9	177.4

VISITOR ARRIVALS	2022P	2021P	2019
TOTAL (AIR)	785,715	439,785	917,026
U.S. West	452,752	296,117	399,049
U.S. East	233,286	133,162	225,648
Japan	4,038	1,051	133,858
Canada	54,475	326	76,913
All Others	41,164	9,129	81,558

PPPD SPENDING (\$)	2022P	2021P	2019
TOTAL (AIR)	217.3	180.0	192.4
U.S. West	214.9	175.6	175.5
U.S. East	237.2	188.2	201.3
Japan	224.4	212.9	237.8
Canada	172.9	121.4	157.7
All Others	206.7	194.8	237.1

AVERAGE DAILY CENSUS	2022P	2021P	2019
TOTAL (AIR)	226,375	137,440	248,930
U.S. West	120,920	90,470	106,250
U.S. East	68,942	42,817	64,823
Japan	1,698	566	25,125
Canada	21,660	287	28,604
All Others	13,155	3,300	24,128

Note: 2022 and 2021 figures are preliminary.

March 2022 Highlights

EXPENDITURES			
(\$mil.)	2022P	2021P	2019
O'ahu	672.8	331.8	672.9
Maui	458.8	259.5	443.3
Moloka'i	3.8	1.9	3.7
Lāna'i	12.0	6.2	11.7
Kaua'i	159.9	51.8	152.6
Hawai'i Island	217.3	115.7	200.7

PPPD			
SPENDING (\$)	2022P	2021P	2019
O'ahu	226.0	188.8	194.3
Maui	231.4	170.7	206.2
Moloka'i	182.6	147.3	162.5
Lāna'i	541.5	429.8	478.3
Kaua'i	189.2	330.5	170.6
Hawai'i Island	185.8	144.7	172.6

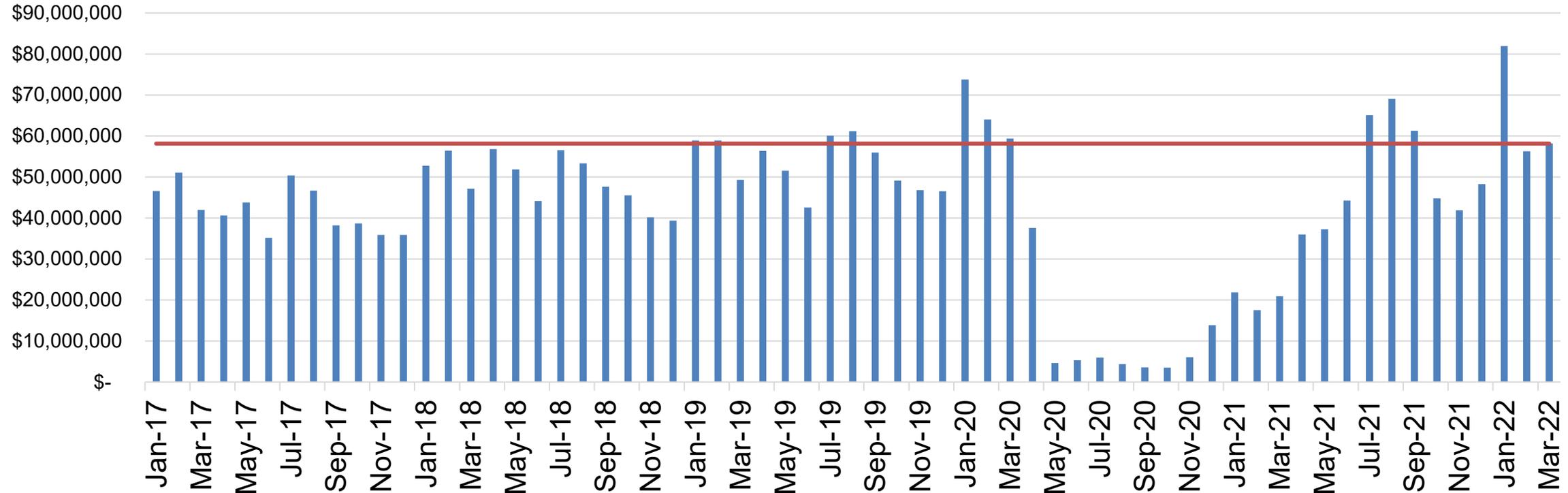
VISITOR			
ARRIVALS	2022P	2021P	2019
O'ahu	404,274	206,942	523,904
Maui	239,538	170,750	271,934
Moloka'i	3,367	1,665	4,948
Lāna'i	5,340	2,590	8,964
Kaua'i	106,544	15,133	122,876
Hawai'i Island	141,854	82,687	161,087

AVERAGE DAILY			
CENSUS	2022P	2021P	2019
O'ahu	96,050	56,684	111,696
Maui	63,948	49,030	69,349
Moloka'i	673	425	731
Lāna'i	715	467	789
Kaua'i	27,263	5,053	28,844
Hawai'i Island	37,725	25,780	37,520

Note: 2022 and 2021 figures are preliminary.

March 2022 Highlights

- Preliminary February TAT Collections: \$58.2 million
- Preliminary March 22 TAT Collections: \$526.8 million (+438.8%)
- Fiscal 21 TAT Collections: \$97.8 million (+\$429.1 million)



Source: Department of Taxation

March 2022 Highlights

PURPOSE OF TRIP - % Total	Total by Air		US West		US East		Japan		Canada	
	2022P	2019	2022P	2019	2022P	2019	2022P	2019	2022P	2019
Pleasure (Net)	85.4%	84.7%	85.8%	84.6%	83.0%	81.7%	68.2%	81.9%	94.9%	95.1%
Honeymoon/Get Married	2.6%	4.8%	2.2%	2.2%	3.2%	3.4%	3.2%	11.4%	1.5%	1.6%
Honeymoon	2.2%	4.3%	1.7%	1.8%	2.8%	2.9%	2.7%	10.6%	1.4%	1.4%
Get Married	0.5%	0.8%	0.5%	0.5%	0.6%	0.6%	0.5%	1.8%	0.2%	0.2%
Pleasure/Vacation	83.2%	80.4%	84.1%	82.8%	80.4%	78.9%	66.4%	71.1%	93.6%	93.8%
Mtgs/Conventions/Incentive	3.6%	2.9%	2.7%	1.8%	5.1%	2.5%	11.4%	6.1%	2.8%	2.0%
Conventions	1.8%	1.2%	1.5%	1.0%	2.6%	1.5%	4.4%	0.5%	1.6%	1.2%
Corporate Meetings	0.9%	0.7%	0.7%	0.6%	1.2%	0.7%	1.5%	0.1%	0.4%	0.7%
Incentive	1.1%	1.1%	0.7%	0.2%	1.6%	0.4%	6.1%	5.5%	0.8%	0.2%
Other Business	2.3%	2.2%	2.4%	2.9%	2.3%	3.0%	3.4%	0.6%	0.4%	0.6%
Visit Friends/Rel.	10.7%	10.1%	11.4%	12.5%	11.4%	14.3%	13.6%	1.5%	3.2%	4.2%
Gov't/Military	1.0%	0.6%	0.7%	0.6%	1.8%	1.2%	0.8%	0.0%	0.0%	0.0%
Attend School	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	2.7%	0.5%	0.0%	0.1%
Sport Events	0.4%	2.5%	0.5%	1.3%	0.4%	1.4%	0.5%	9.6%	0.1%	1.1%
Other	2.3%	3.2%	2.1%	2.6%	2.5%	3.1%	6.1%	6.8%	1.1%	0.9%

Note: 2022 and 2021 figures are preliminary.

March 2022 Highlights

ACCOMMODATIONS - % Total	Total by Air		US West		US East		Japan		Canada	
	2022P	2019	2022P	2019	2022P	2019	2022P	2019	2022P	2019
Plan to stay in Hotel	54.5%	58.4%	51.4%	48.5%	59.6%	56.5%	57.0%	82.5%	49.4%	45.5%
Plan to stay in Condo	18.5%	16.7%	19.2%	18.7%	15.0%	14.0%	19.7%	13.2%	31.9%	32.5%
Plan to stay in Timeshare	8.4%	7.2%	8.5%	8.6%	8.2%	7.3%	7.6%	5.3%	11.4%	8.8%
Cruise Ship	0.1%	1.1%	0.0%	0.7%	0.1%	2.5%	0.0%	0.3%	0.1%	1.1%
Friends/Relatives	11.7%	12.2%	12.4%	15.3%	12.2%	16.0%	13.0%	1.2%	5.4%	5.8%
Bed & Breakfast	1.0%	1.2%	1.0%	1.2%	1.1%	1.5%	0.2%	0.2%	0.8%	1.5%
Rental House	11.3%	10.5%	11.9%	12.1%	11.3%	12.2%	1.1%	0.4%	9.7%	13.0%
Hostel	1.0%	0.8%	0.5%	0.7%	0.5%	0.9%	0.4%	0.1%	0.7%	1.8%
Camp Site, Beach	0.6%	0.7%	0.6%	0.8%	0.5%	0.7%	0.1%	0.0%	0.8%	1.9%
Private Room in Private Home**	1.1%	1.8%	0.9%	1.4%	0.9%	1.4%	0.8%	0.4%	1.3%	1.8%
Shared Room/Space in Private Home**	0.3%	0.5%	0.3%	0.5%	0.2%	0.5%	1.2%	0.3%	0.2%	0.6%
Other	1.4%	1.5%	1.5%	2.0%	1.4%	2.0%	3.6%	0.0%	1.0%	1.4%

Note: 2022 and 2021 figures are preliminary.

March 2022 Highlights

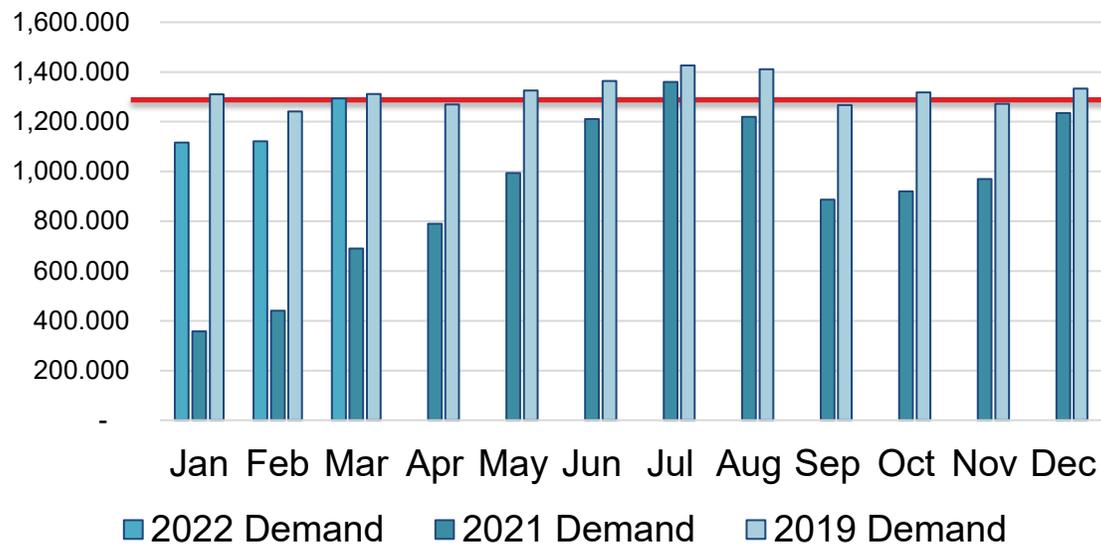
State of Hawai'i Hotel Performance

	2022	2021	2019
Occupancy	75.2%	43.0%	78.8%
ADR	\$378	\$284	\$285
RevPAR	\$284	\$122	\$224

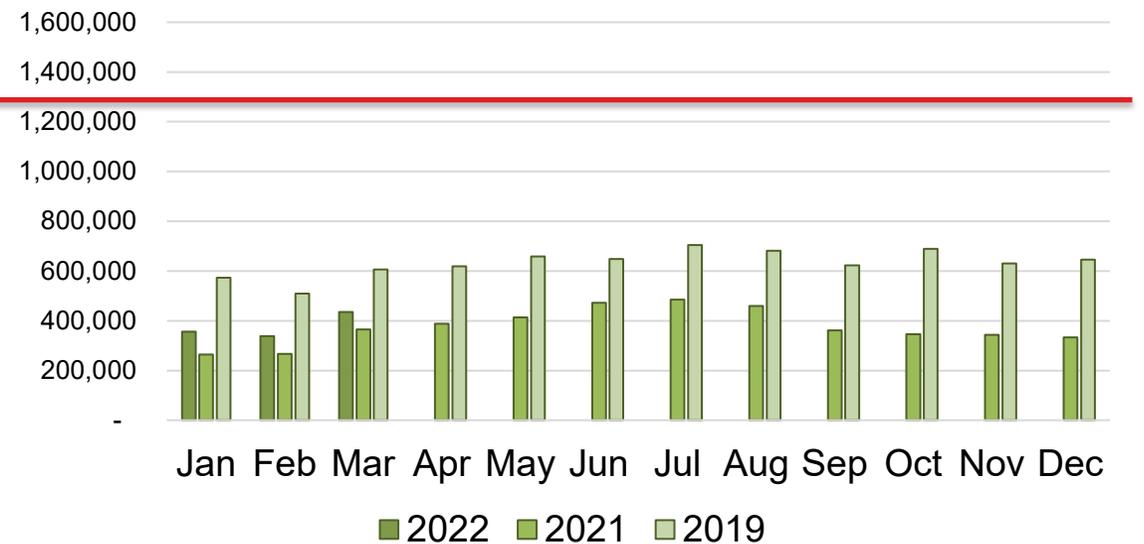
State of Hawai'i Vacation Rental Performance

	2022	2021	2019
Occupancy	74.1%	62.3%	78.6%
ADR	\$300	\$248	\$214

State of Hawai'i Hotel Demand



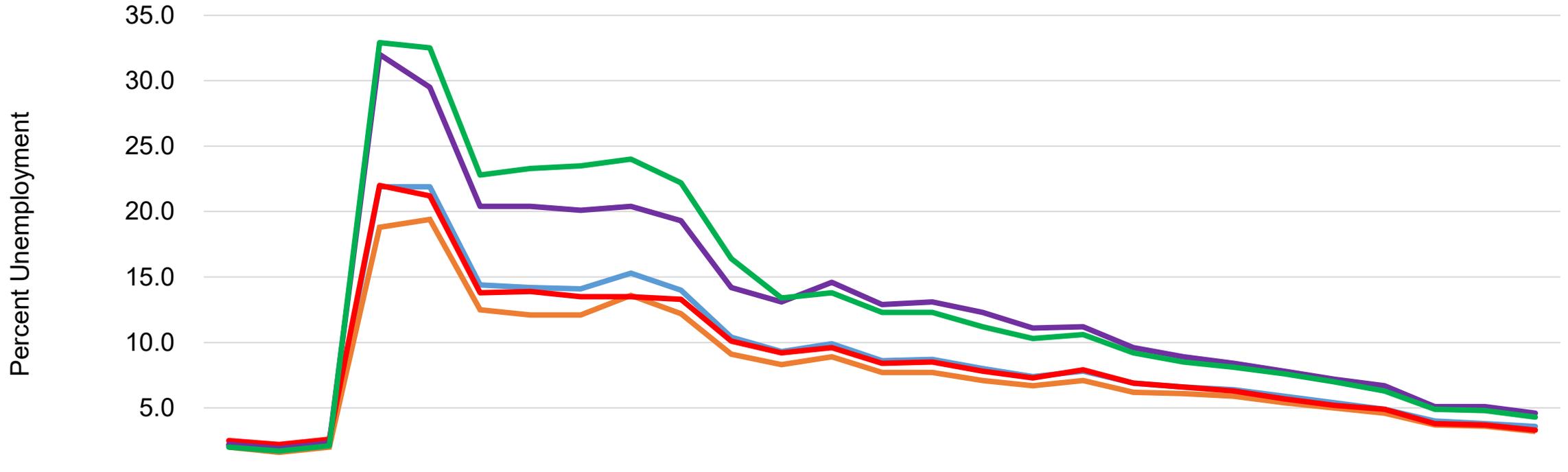
State of Hawai'i Vacation Rental Demand



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

March 2022 Highlights

Unemployment Rate, Civilian



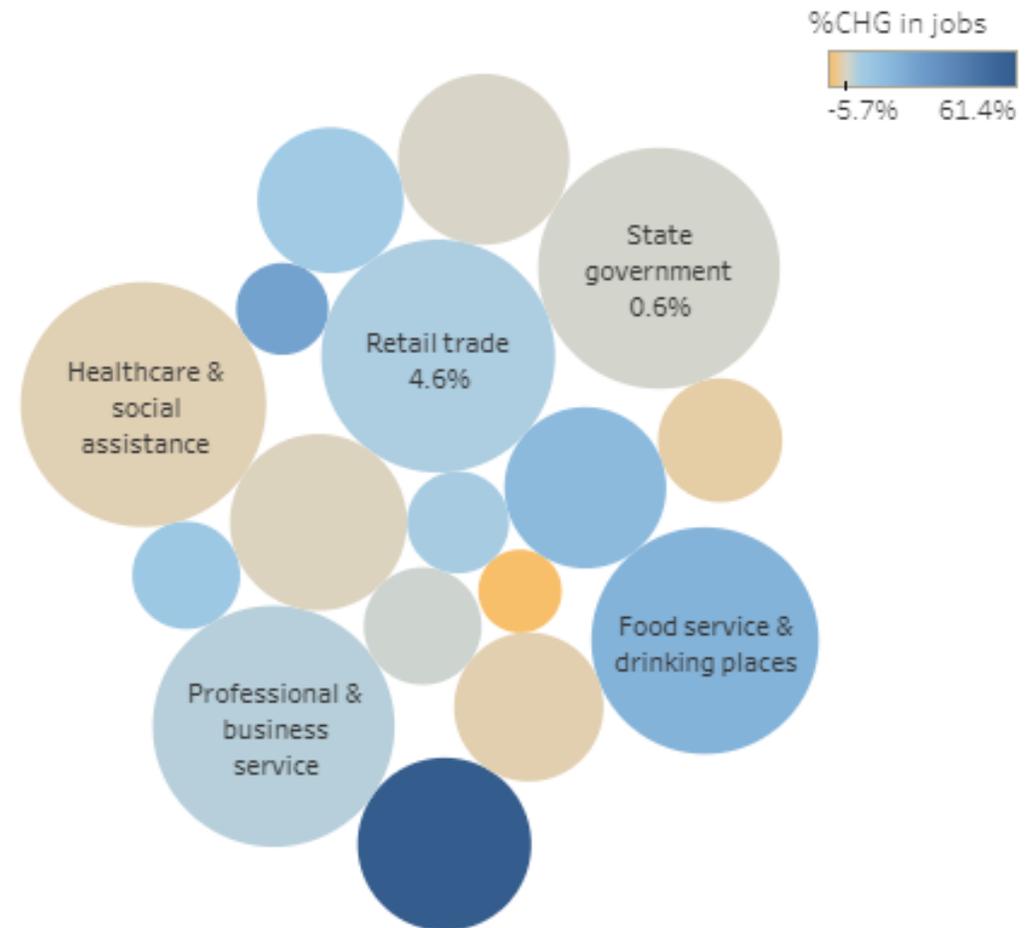
	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12	2021-01	2021-02	2021-03	2021-04	2021-05	2021-06	2021-07	2021-08	2021-09	2021-10	2021-11	2021-12	2022-01	2022-02	2022-03
State of Hawai'i	2.1	1.7	2.1	21.	21.	14.	14.	14.	15.	14.	10.	9.3	9.9	8.6	8.7	8.0	7.4	7.8	6.9	6.6	6.4	5.9	5.4	4.9	4.0	3.8	3.58
Honolulu County	2.0	1.6	2.0	18.	19.	12.	12.	12.	13.	12.	9.1	8.3	8.9	7.7	7.7	7.1	6.7	7.1	6.2	6.1	5.9	5.4	5.0	4.6	3.7	3.6	3.2
Hawai'i County	2.5	2.2	2.6	22.	21.	13.	13.	13.	13.	13.	10.	9.2	9.6	8.4	8.5	7.8	7.3	7.9	6.9	6.6	6.3	5.7	5.2	4.9	3.8	3.7	3.3
Kaua'i County	2.2	1.9	2.3	32.	29.	20.	20.	20.	20.	19.	14.	13.	14.	12.	13.	12.	11.	11.	9.6	8.9	8.4	7.8	7.2	6.7	5.1	5.1	4.6
Maui County	2.0	1.7	2.1	32.	32.	22.	23.	23.	24.	22.	16.	13.	13.	12.	12.	11.	10.	10.	9.2	8.5	8.1	7.6	7.0	6.3	4.9	4.8	4.3

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

March 2022 Highlights

	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	601,800	35,200	6.2%
Nat'l resources, mining & construction	36,900	-200	-0.5%
Manufacturing	12,300	600	5.1%
Wholesale trade	16,300	200	1.2%
Retail trade	64,300	2,800	4.6%
Transportation, warehousing & utilities	30,800	4,000	14.9%
Information	8,200	-500	-5.7%
Financial activities	26,300	-400	-1.5%
Professional & business service	68,900	2,300	3.5%
Educational service	13,700	1,000	7.9%
Healthcare & social assistance	71,000	-900	-1.3%
Arts, entertainment & recreation	10,000	2,000	25.0%
Accommodation	35,500	13,500	61.4%
Food service & drinking places	60,900	9,300	18.0%
Other service	25,100	1,500	6.4%
Federal government	34,600	0	0.0%
State government	68,800	400	0.6%
Local government	18,200	-400	-2.2%

*Change from the same period of previous year



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

Scheduled Nonstop Seats to Hawai'i by Port Entry

March	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,161,904	665,209	1,192,137	1,030,493	645,972	843,016	131,411	19,237	349,121
HONOLULU	592,086	355,116	719,332	509,611	336,407	428,703	82,475	18,709	290,629
KAHULUI	329,614	201,933	250,374	293,981	201,405	216,787	35,633	528	33,587
KONA	130,795	92,336	124,674	122,712	92,336	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	13,832	94,092	100,290	13,832	87,008	5,220	0	7,084

April	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,099,136	724,110	1,098,664	965,576	703,783	777,559	133,560	20,327	321,105
HONOLULU	578,714	370,053	670,423	483,304	350,442	395,313	95,410	19,611	275,110
KAHULUI	298,671	225,584	241,065	270,901	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 April 25, 2022, subject to change

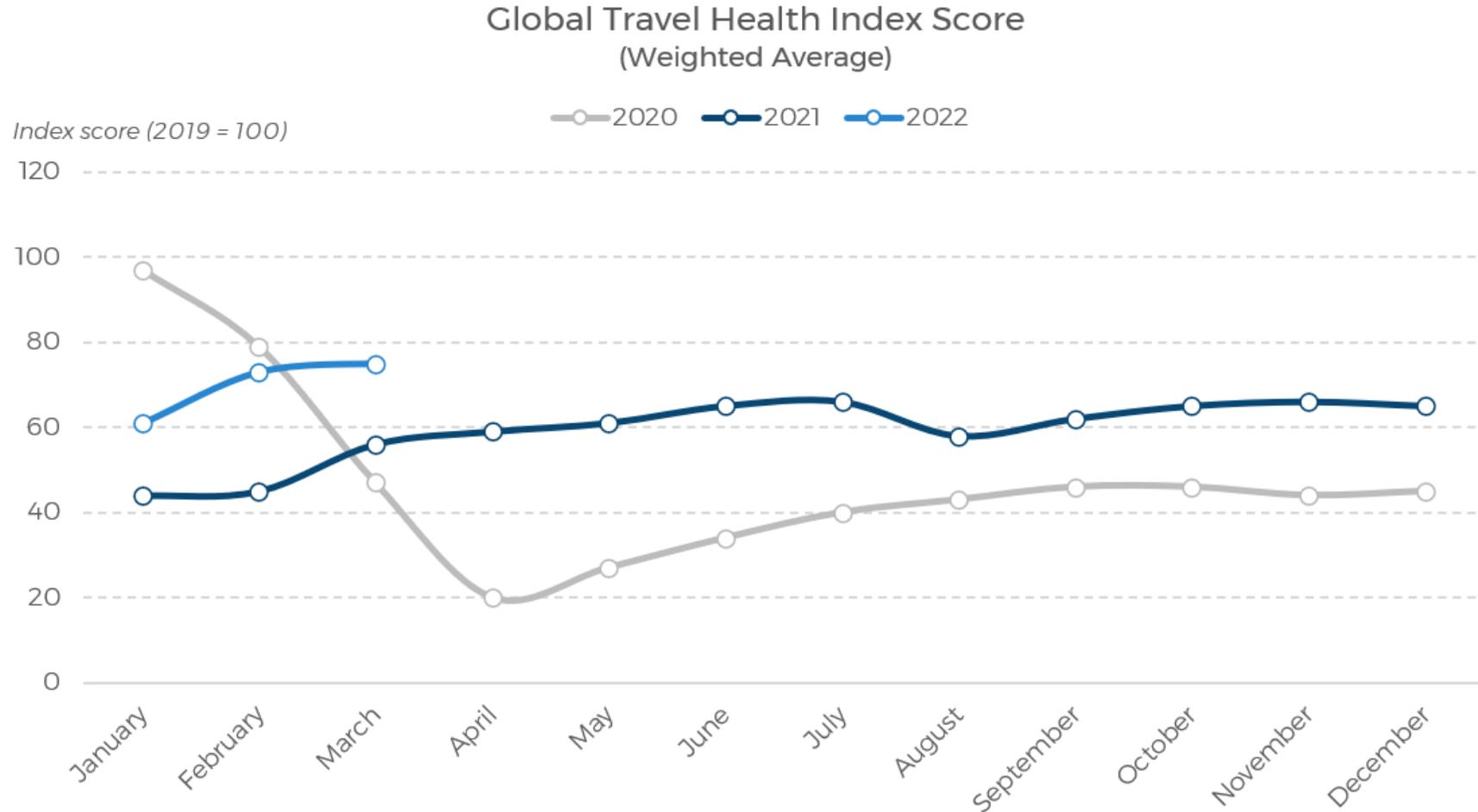
Scheduled Nonstop Seats to Hawai'i by Port Entry

May	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,060,995	825,181	1,108,820	961,883	803,653	818,795	99,112	21,528	290,025
HONOLULU	563,595	420,233	690,095	475,116	398,837	419,399	88,479	21,396	270,696
KAHULUI	274,236	243,005	228,732	263,603	242,873	219,464	10,633	132	9,268
KONA	117,878	107,706	106,089	117,878	107,706	96,028	0	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	1,100,534	987,982	1,176,403	990,267	967,345	898,420	110,267	20,637	277,983
HONOLULU	573,565	497,693	701,510	472,022	477,056	441,174	101,543	20,637	260,336
KAHULUI	293,559	278,205	265,892	284,835	278,205	257,829	8,724	0	8,063
KONA	124,080	124,659	114,157	124,080	124,659	104,573	0	0	9,584
HILO	5,191	4,999	4,700	5,191	4,999	4,700	0	0	0
LIHU'E	104,139	82,426	90,144	104,139	82,426	90,144	0	0	0

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of April 25, 2022, subject to change

Skift Travel Health Index March 2022



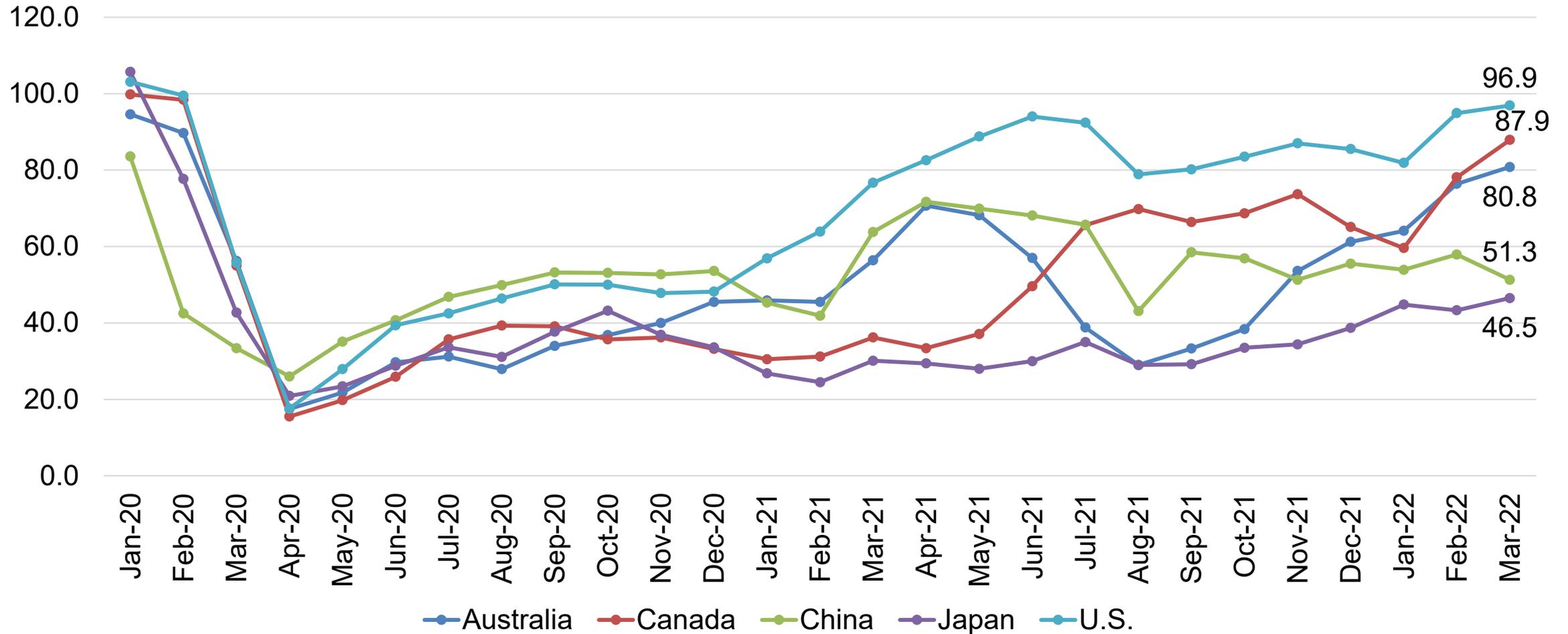
Source: Skift Research from partner data. All data vs same month in 2019.



Source: Skift Research

Skift Travel Health Index by Country

Skift Travel Health Index for Selected Countries

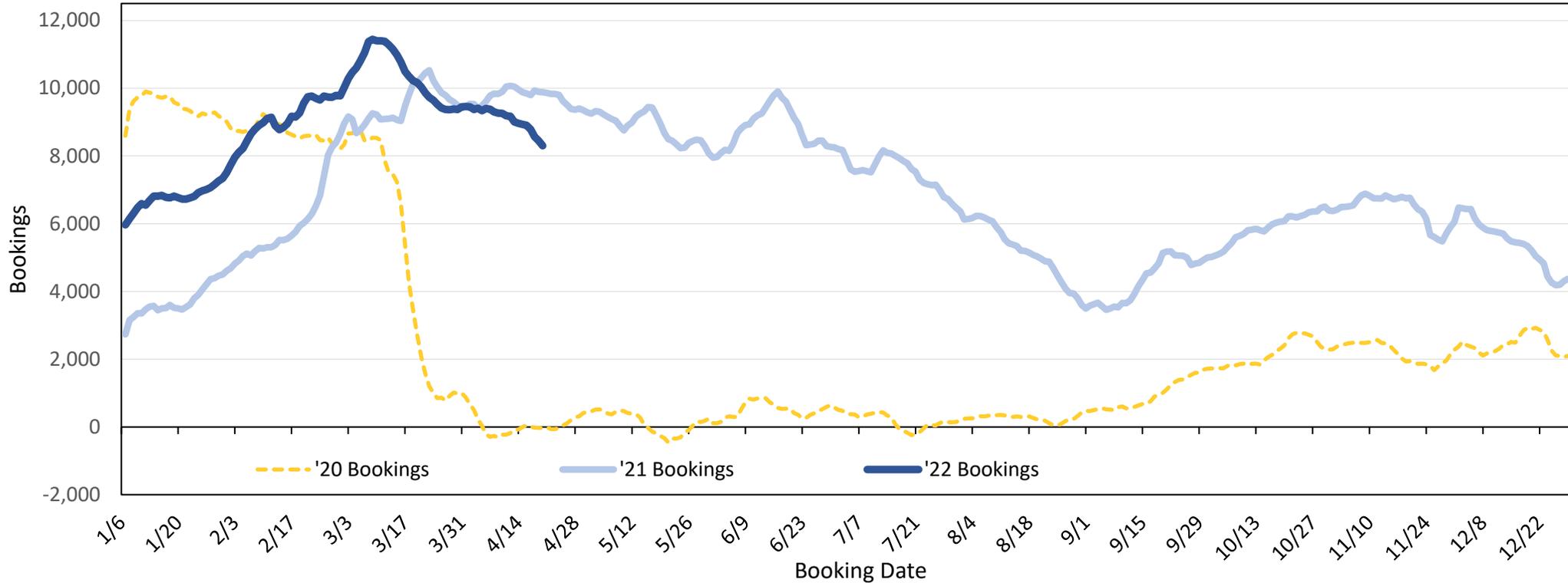


Source: Skift Research

TRAVEL AGENCY BOOKING TRENDS

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of April 23, 2022
U.S.



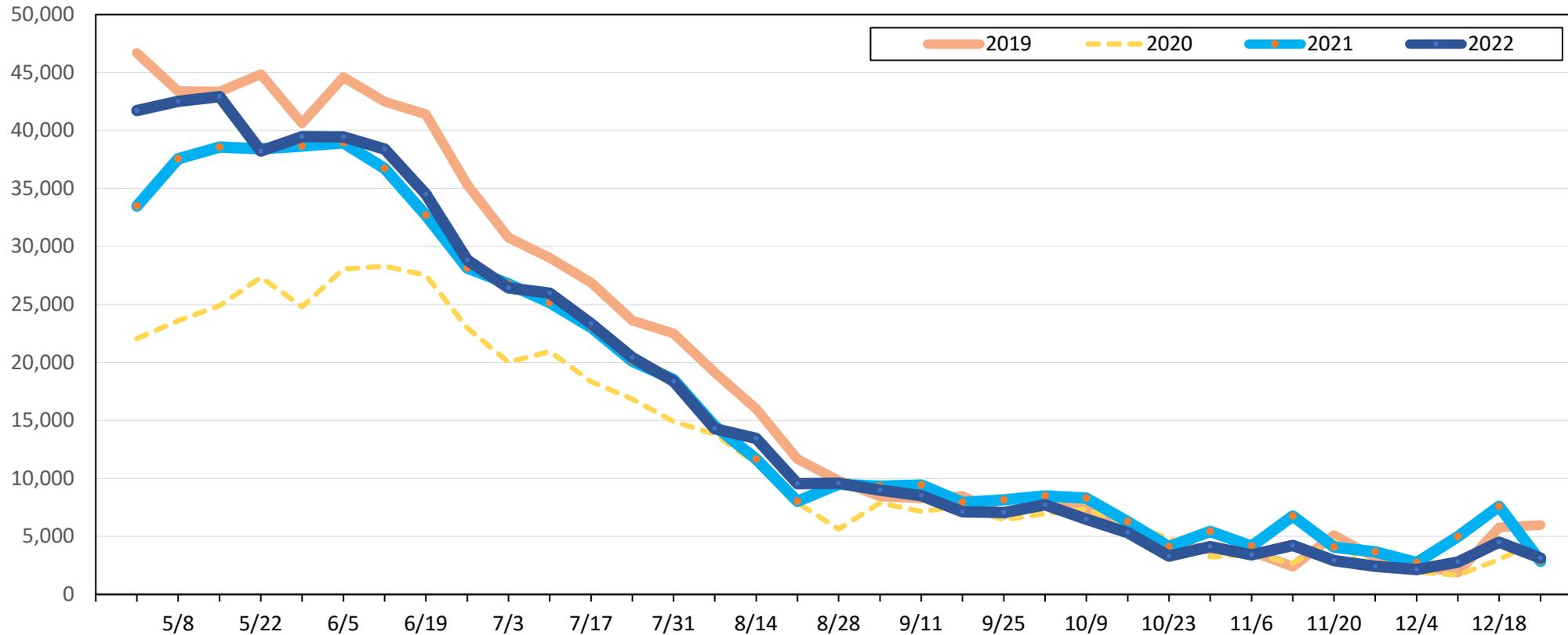
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Apr 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawai'i for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022 U.S.

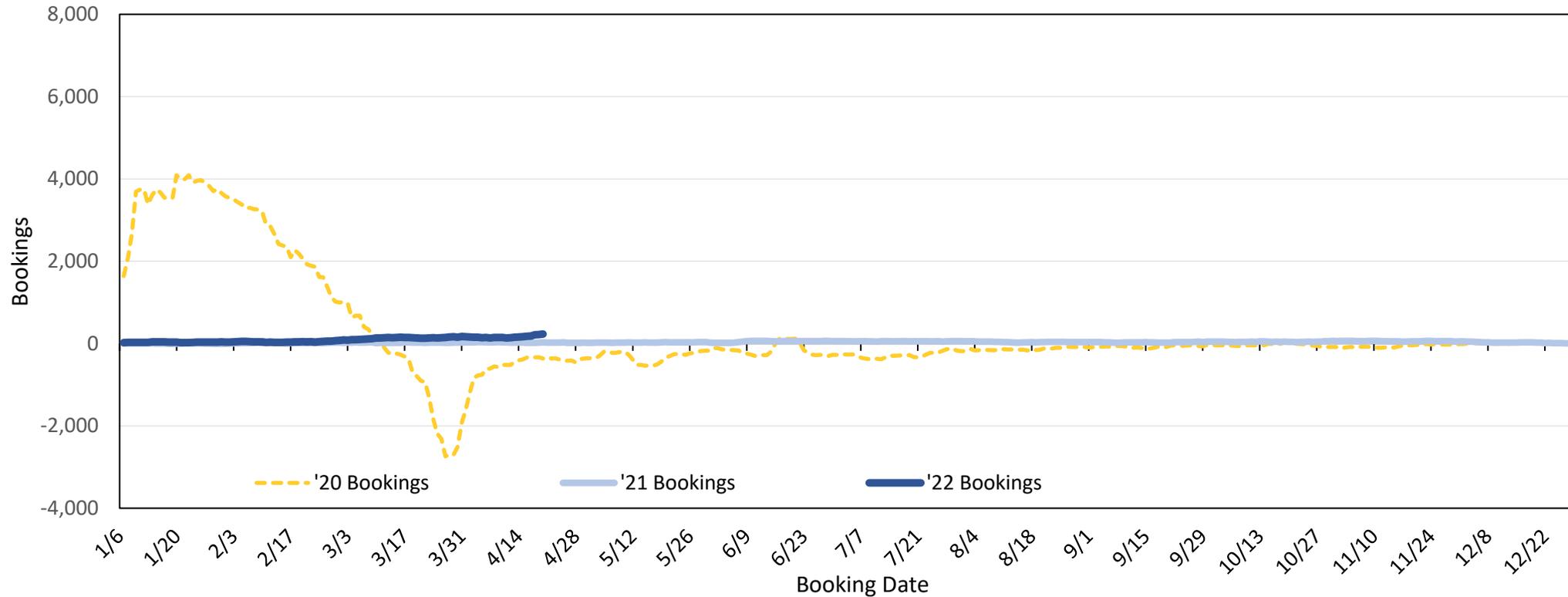


Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of April 23, 2022
Japan



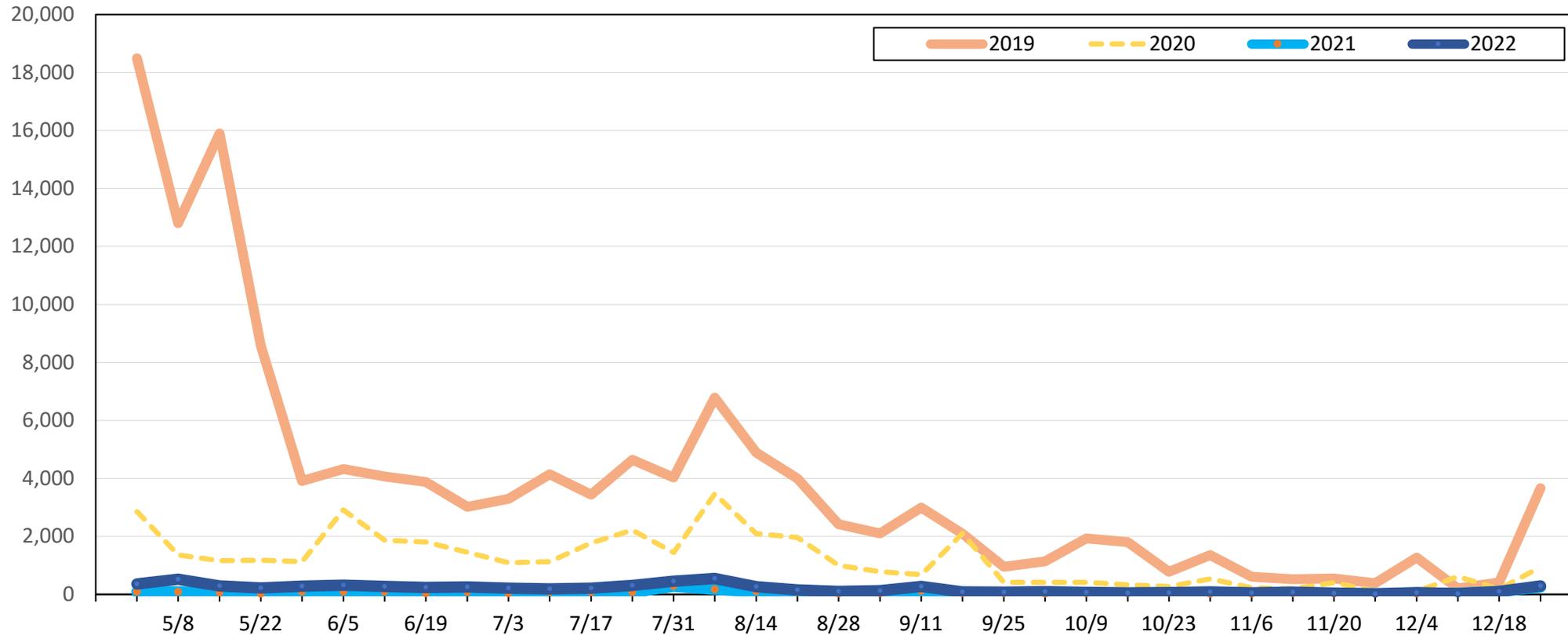
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Apr 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022 Japan

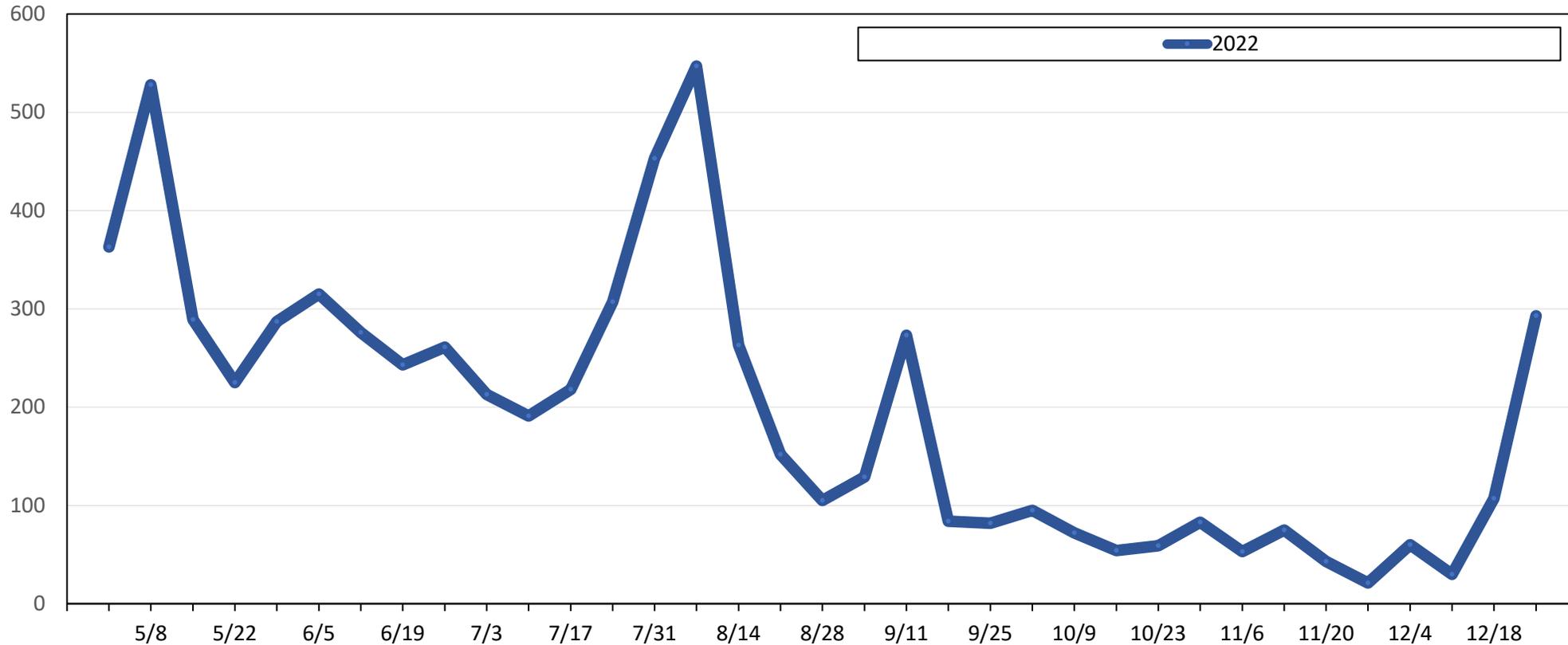


Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022
Japan

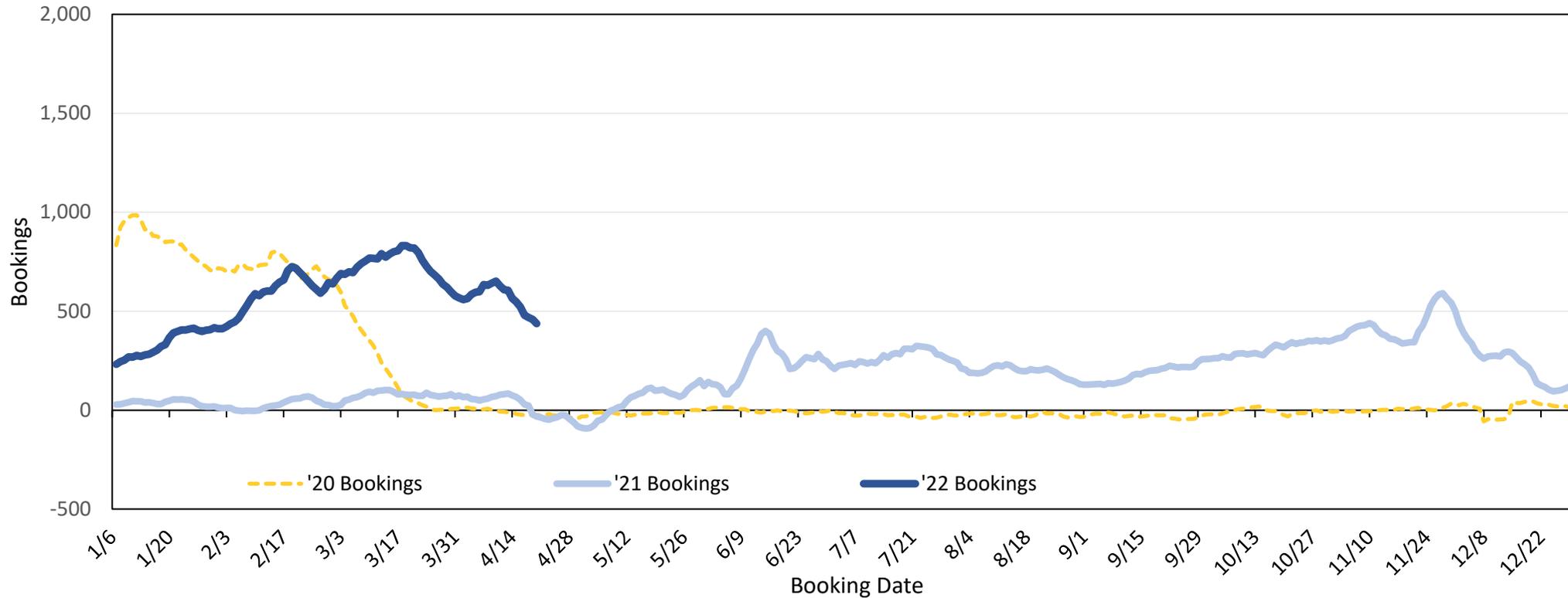


Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of April 23, 2022
Canada



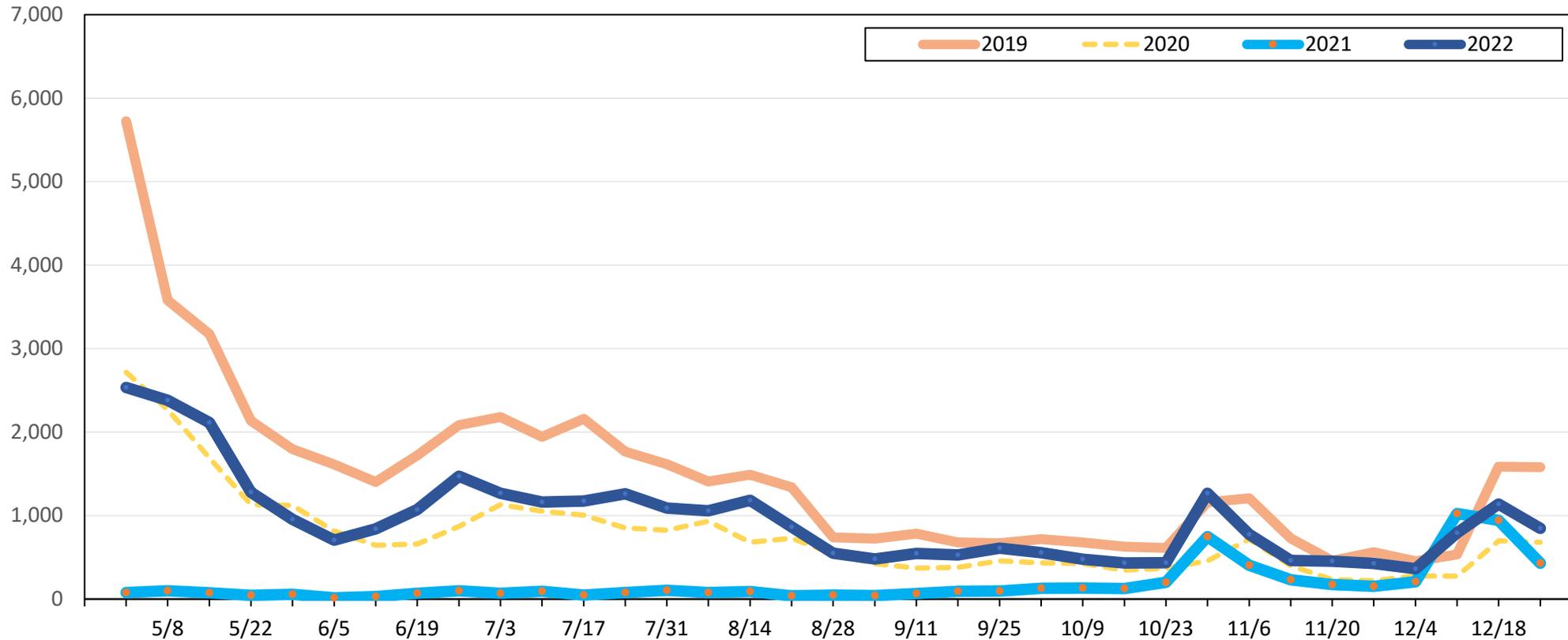
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Apr 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022
Canada

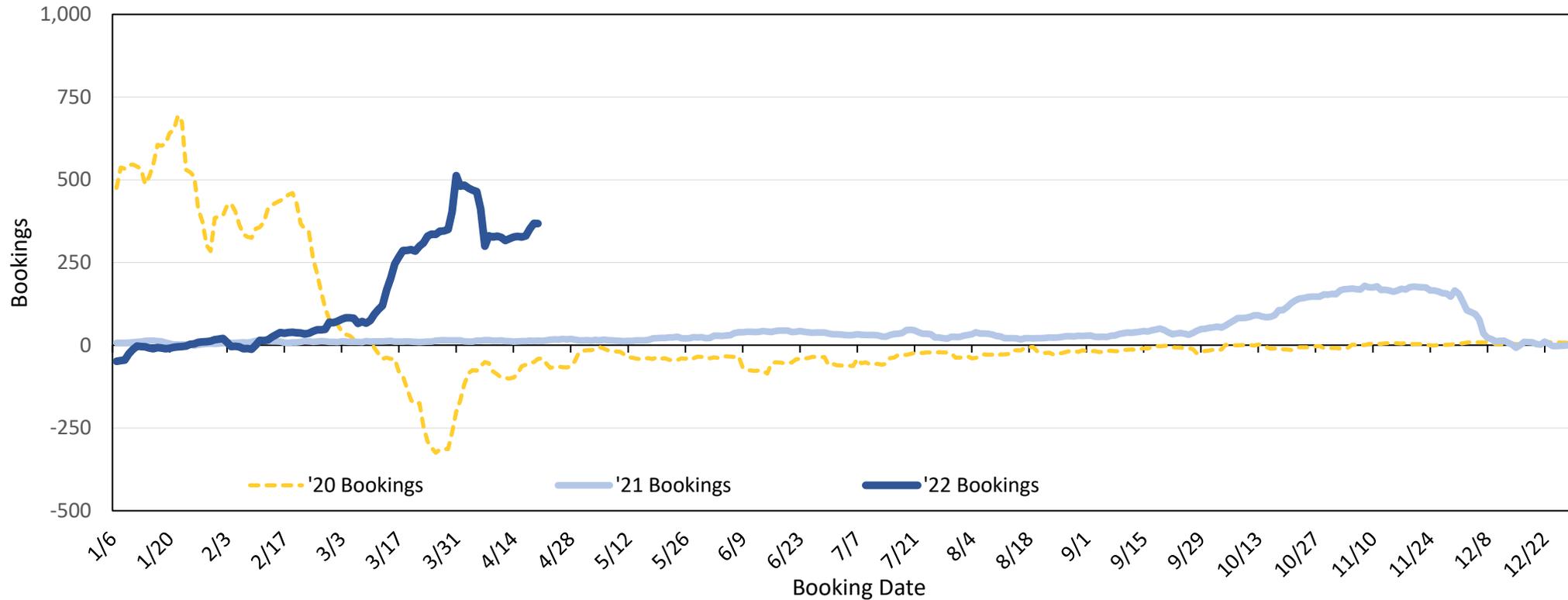


Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of April 23, 2022
Korea



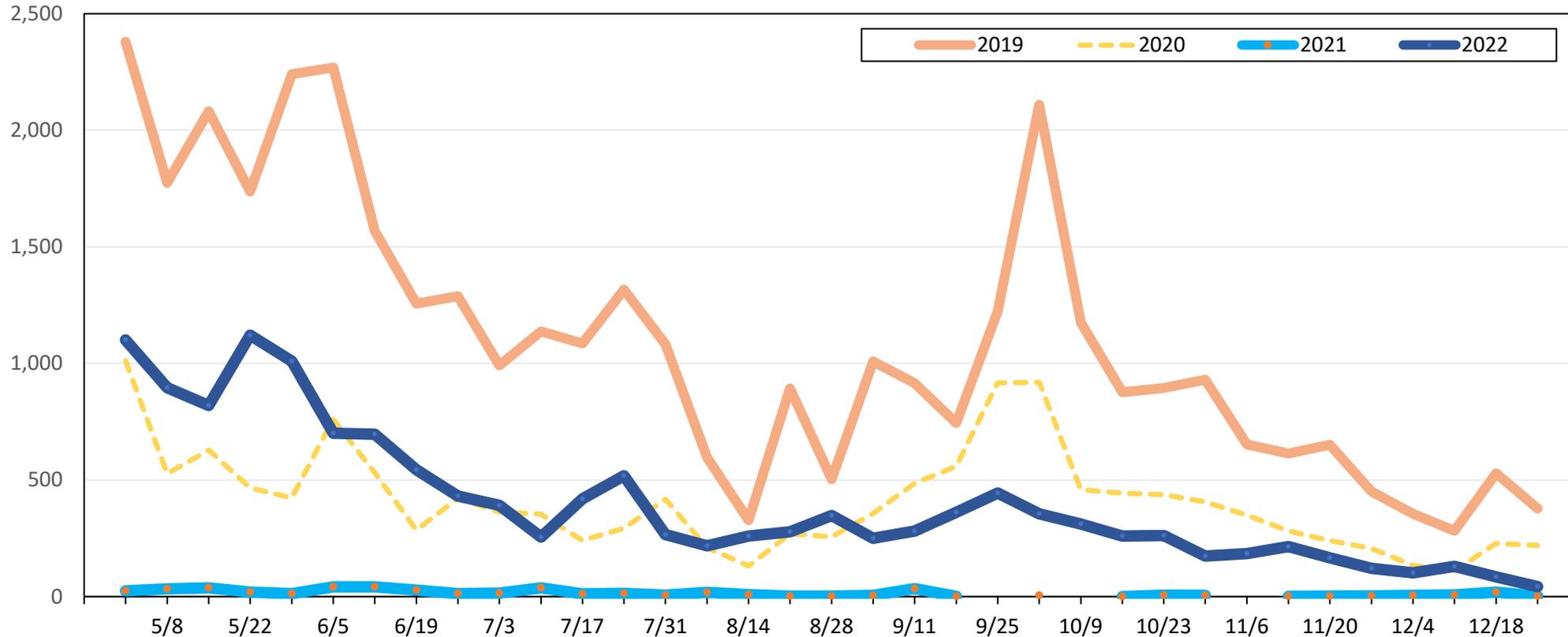
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Apr 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022 Korea



Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of April 23, 2022
Australia



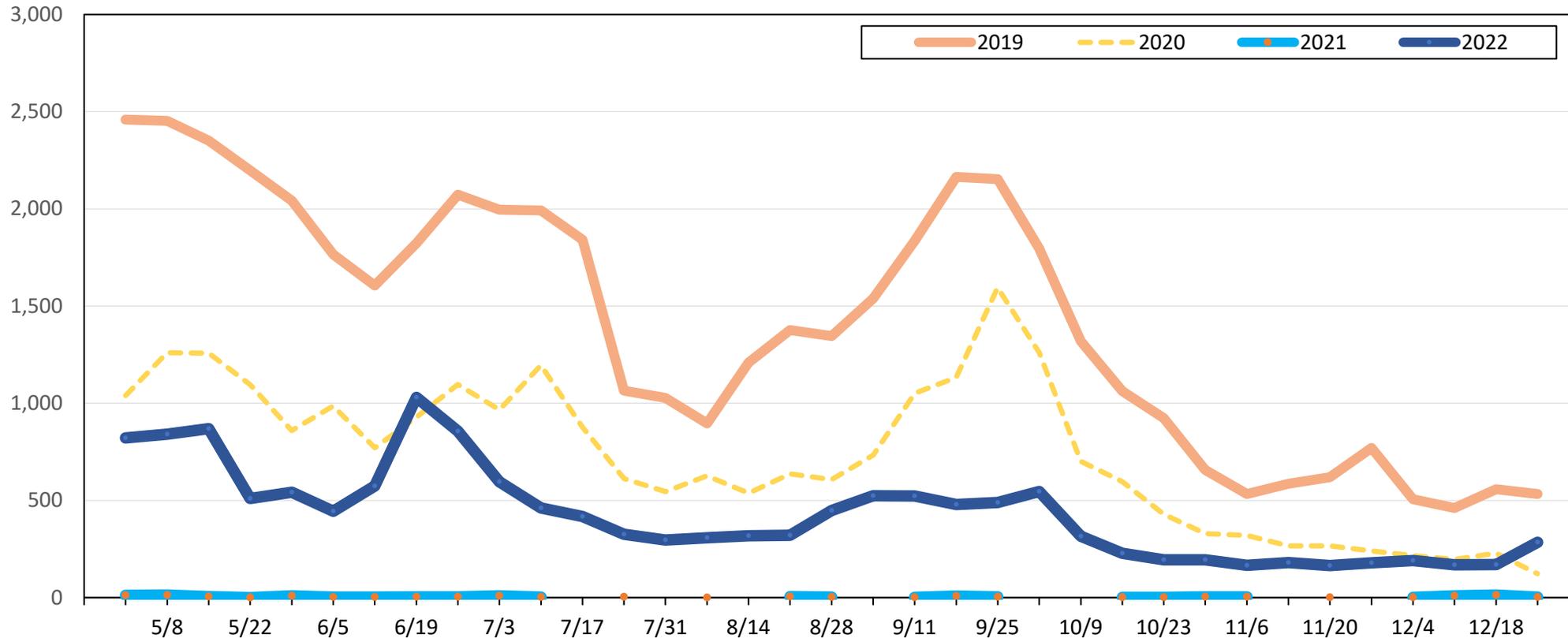
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Apr 23, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of April 23, 2022 Australia



Source: Global Agency Pro, as of April 23, 2022

Source: Global Agency Pro

MAHALO!

