

HTA REGULAR BOARD MEETING

Thursday, May 26, 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

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.

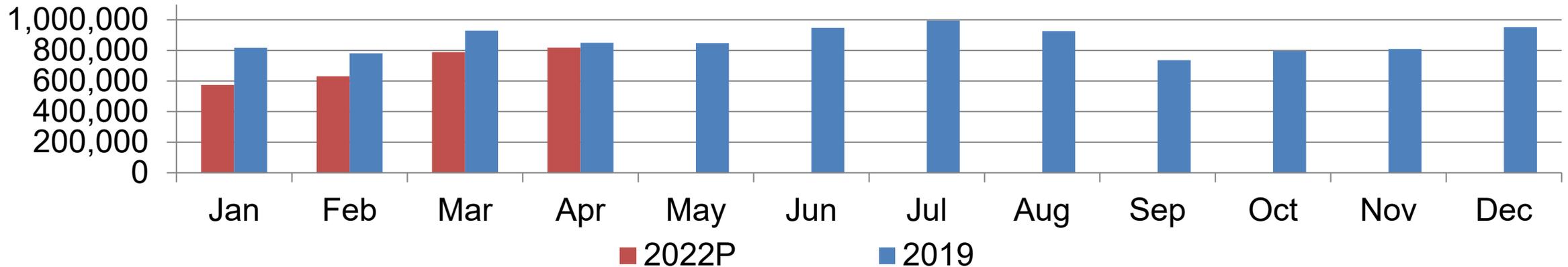
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

April 2022 Highlights

Monthly Visitor Expenditures (\$mil)



Monthly Visitor Arrivals



Note: 2022 figures are preliminary.

April 2022 Highlights

EXPENDITURES (\$mil.)	2022P	2021P	2019
TOTAL (AIR)	1,592.2	837.2	1,307.9
U.S. West	940.9	573.2	547.0
U.S. East	422.9	233.7	286.8
Japan	15.3	4.5	164.0
Canada	88.8	1.9	100.2
All Others	124.3	23.9	210.0

PPPD SPENDING (\$)	2022P	2021P	2019
TOTAL (AIR)	225.5	184.3	190.0
U.S. West	223.5	178.3	171.4
U.S. East	241.9	199.2	200.0
Japan	230.9	213.9	233.9
Canada	181.5	151.3	153.7
All Others	226.9	199.7	231.5

VISITOR ARRIVALS	2022P	2021P	2019
TOTAL (AIR)	809,612	484,071	824,610
U.S. West	514,878	352,147	388,573
U.S. East	188,868	119,189	159,115
Japan	6,749	1,367	119,487
Canada	43,107	527	56,749
All Others	56,010	10,842	100,686

AVERAGE DAILY CENSUS	2022P	2021P	2019
TOTAL (AIR)	235,398	151,386	229,500
U.S. West	140,344	107,187	106,378
U.S. East	58,275	39,099	47,792
Japan	2,212	706	23,371
Canada	16,310	410	21,726
All Others	18,257	3,984	30,234

Note: 2022 and 2021 figures are preliminary.

April 2022 Highlights

EXPENDITURES (\$mil.)	2022P	2021P	2019
O'ahu	703.4	359.5	613.3
Maui	496.7	283.3	398.6
Moloka'i	3.8	2.0	3.2
Lāna'i	12.6	6.4	8.0
Kaua'i	176.3	77.5	135.8
Hawai'i Island	199.3	108.3	149.1

PPPD SPENDING (\$)	2022P	2021P	2019
O'ahu	236.8	198.9	187.2
Maui	243.7	184.2	210.0
Moloka'i	201.6	161.4	167.6
Lāna'i	418.8	348.6	435.1
Kaua'i	199.7	196.2	178.7
Hawai'i Island	177.9	140.7	163.2

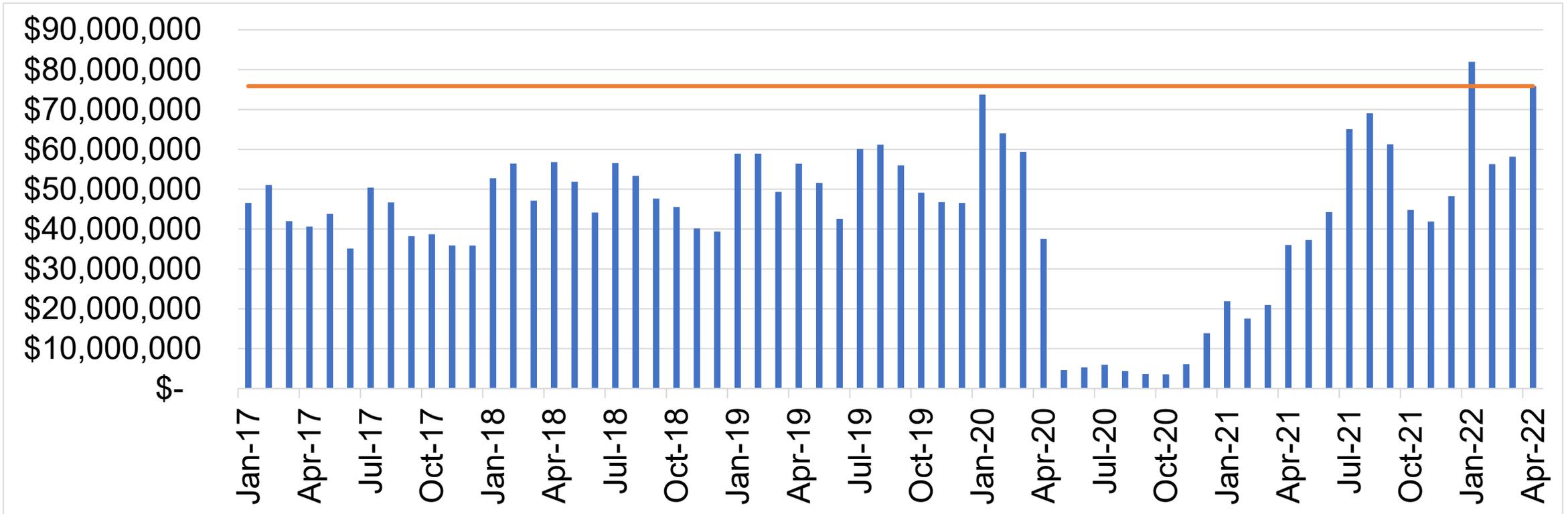
VISITOR ARRIVALS	2022P	2021P	2019
O'ahu	416,285	223,070	487,367
Maui	254,398	178,105	247,984
Moloka'i	3,693	1,588	4,395
Lāna'i	6,684	3,382	5,395
Kaua'i	115,578	41,905	106,181
Hawai'i Island	140,302	81,952	130,224

AVERAGE DAILY CENSUS	2022P	2021P	2019
O'ahu	99,023	60,261	109,204
Maui	67,943	51,264	63,280
Moloka'i	632	422	633
Lāna'i	1,005	612	609
Kaua'i	29,438	13,165	25,330
Hawai'i Island	37,356	25,663	30,444

Note: 2022 and 2021 figures are preliminary.

April 2022 Highlights

- Preliminary April TAT Collections: \$75.9 million
- Preliminary YTD Fiscal 22 TAT Collections: \$602.7 million (+350.5%)
- YTD Fiscal 21 TAT Collections: \$133.8 million (+\$ 468.9 million)



Source: Department of Taxation

April 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)	86.0%	84.7%	87.4%	84.6%	81.8%	81.7%	78.3%	81.9%	93.2%	95.1%
Honeymoon/Get Married	3.6%	4.8%	2.5%	2.2%	4.7%	3.4%	6.7%	11.4%	3.6%	1.6%
Honeymoon	3.1%	4.3%	1.9%	1.8%	4.1%	2.9%	6.4%	10.6%	3.4%	1.4%
Get Married	0.7%	0.8%	0.6%	0.5%	0.8%	0.6%	1.2%	1.8%	0.7%	0.2%
Pleasure/Vacation	83.1%	80.4%	85.5%	82.8%	77.9%	78.9%	72.0%	71.1%	90.4%	93.8%
Mtgs/Conventions/Incentive	3.8%	2.9%	2.7%	1.8%	6.1%	2.5%	5.1%	6.1%	3.5%	2.0%
Conventions	1.6%	1.2%	1.4%	1.0%	2.5%	1.5%	2.3%	0.5%	2.0%	1.2%
Corporate Meetings	1.2%	0.7%	0.8%	0.6%	1.8%	0.7%	1.8%	0.1%	0.3%	0.7%
Incentive	1.1%	1.1%	0.7%	0.2%	2.2%	0.4%	1.7%	5.5%	1.2%	0.2%
Other Business	2.5%	2.2%	2.5%	2.9%	3.2%	3.0%	2.5%	0.6%	0.6%	0.6%
Visit Friends/Rel.	9.4%	10.1%	9.4%	12.5%	10.9%	14.3%	9.8%	1.5%	3.1%	4.2%
Gov't/Military	1.0%	0.6%	0.5%	0.6%	2.0%	1.2%	0.7%	0.0%	0.0%	0.0%
Attend School	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%	1.1%	0.5%	0.0%	0.1%
Sport Events	0.5%	2.5%	0.5%	1.3%	0.4%	1.4%	4.0%	9.6%	0.2%	1.1%
Other	2.7%	3.2%	2.5%	2.6%	3.2%	3.1%	6.6%	6.8%	2.2%	0.9%

Note: 2022 figures are preliminary.

April 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	56.8%	58.4%	53.8%	48.5%	61.4%	56.5%	58.8%	82.5%	51.8%	45.5%
Plan to stay in Condo	17.1%	16.7%	18.4%	18.7%	13.3%	14.0%	25.5%	13.2%	27.4%	32.5%
Plan to stay in Timeshare	8.6%	7.2%	9.4%	8.6%	8.0%	7.3%	11.5%	5.3%	7.8%	8.8%
Cruise Ship	0.6%	1.1%	0.2%	0.7%	1.8%	2.5%	0.6%	0.3%	0.2%	1.1%
Friends/Relatives	10.1%	12.2%	10.3%	15.3%	11.5%	16.0%	6.8%	1.2%	4.9%	5.8%
Bed & Breakfast	1.0%	1.2%	0.9%	1.2%	1.2%	1.5%	1.1%	0.2%	0.9%	1.5%
Rental House	11.3%	10.5%	11.9%	12.1%	11.1%	12.2%	1.1%	0.4%	11.8%	13.0%
Hostel	0.6%	0.8%	0.4%	0.7%	0.6%	0.9%	0.9%	0.1%	1.3%	1.8%
Camp Site, Beach	0.7%	0.7%	0.6%	0.8%	0.7%	0.7%	0.6%	0.0%	1.6%	1.9%
Private Room in Private Home**	1.1%	1.8%	0.9%	1.4%	1.0%	1.4%	1.0%	0.4%	1.9%	1.8%
Shared Room/Space in Private Home**	0.3%	0.5%	0.3%	0.5%	0.3%	0.5%	0.2%	0.3%	0.2%	0.6%
Other	1.8%	1.5%	1.7%	2.0%	2.1%	2.0%	3.8%	0.0%	1.4%	1.4%

Note: 2022 figures are preliminary.

April 2022 Highlights

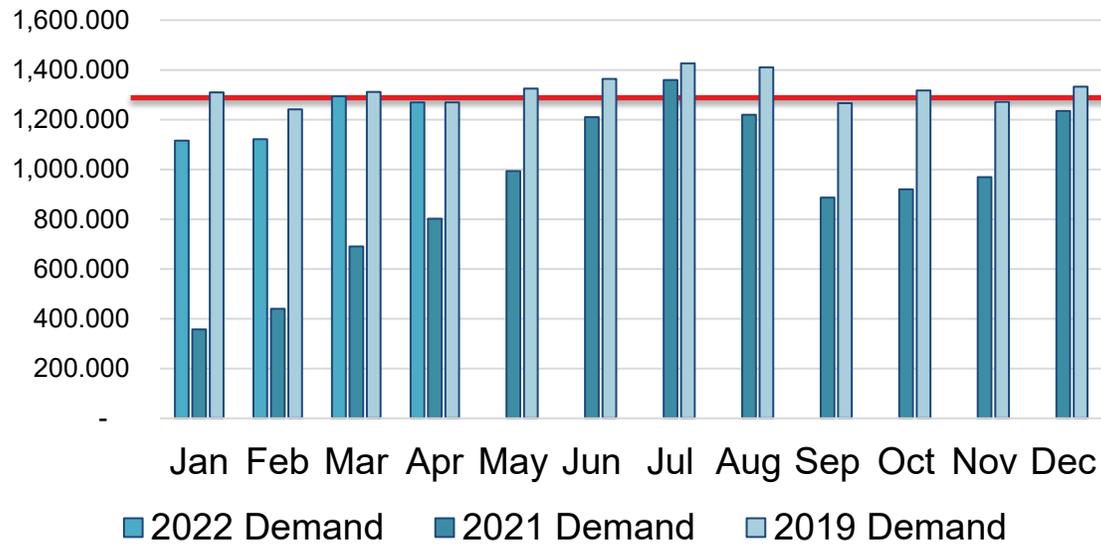
State of Hawai'i Hotel Performance

	2022	2021	2019
Occupancy	76.2%	51.0%	78.0%
ADR	\$371	\$301	\$272
RevPAR	\$283	\$153	\$212

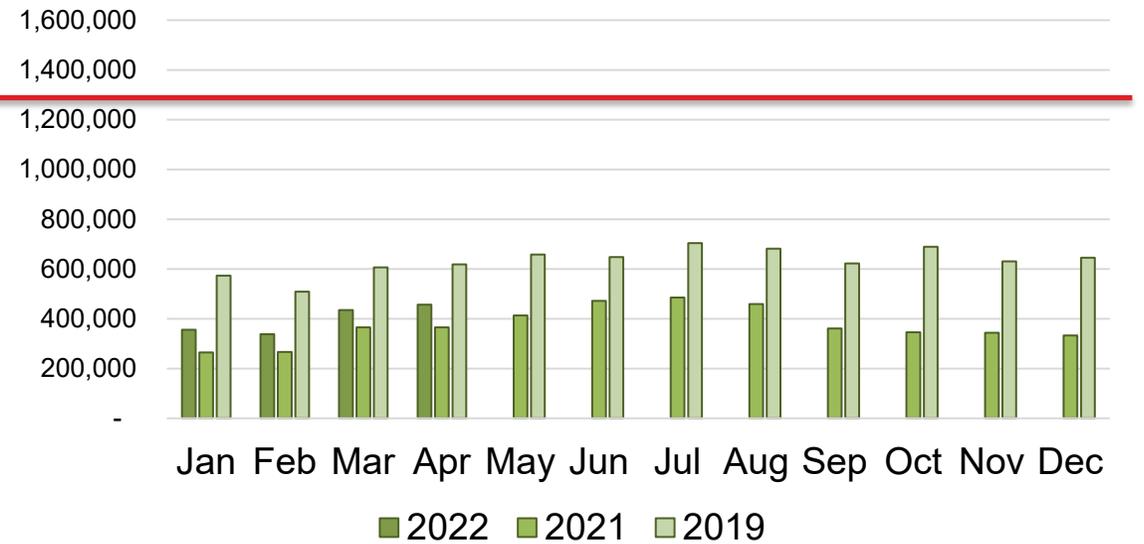
State of Hawai'i Vacation Rental Performance

	2022	2021	2019
Occupancy	72.4%	66.3%	73.1%
ADR	\$291	\$237	\$204

State of Hawai'i Hotel Demand



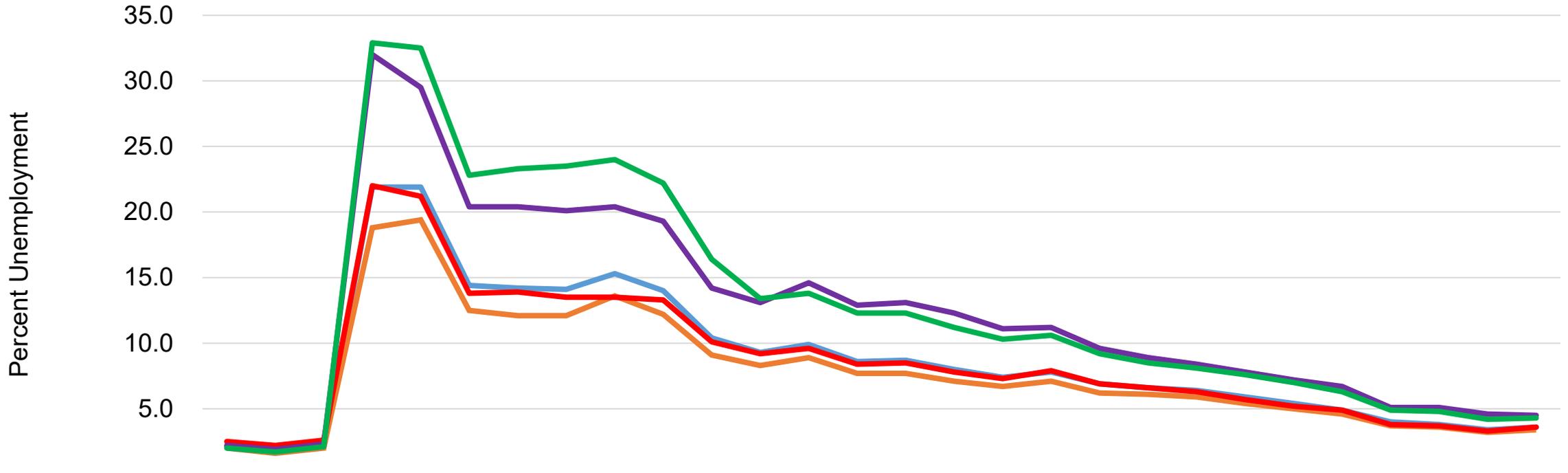
State of Hawai'i Vacation Rental Demand



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

April 2022 Highlights

Unemployment Rate, Civilian



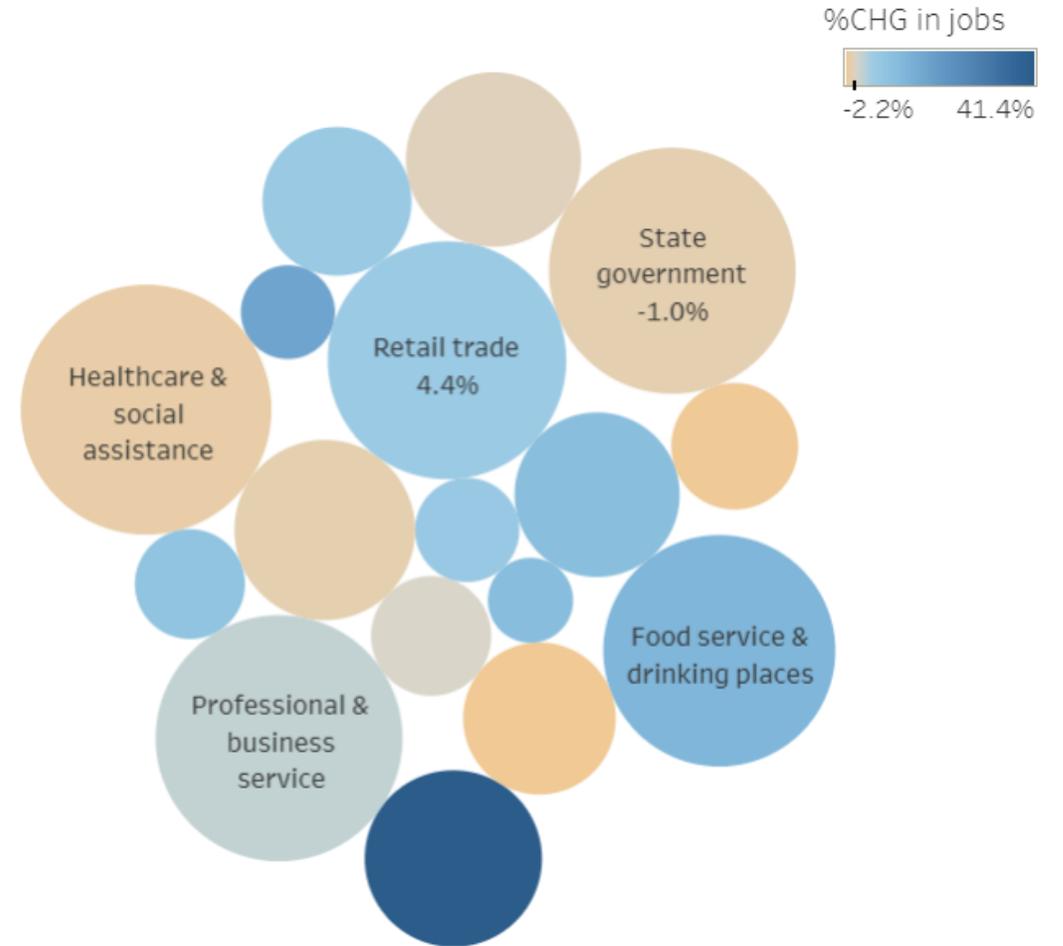
	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12	2021-01	2021-02	2021-03	2021-04	2021-05	2021-06	2021-07	2021-08	2021-09	2021-10	2021-11	2021-12	2022-01	2022-02	2022-03	2022-04
State of Hawai'i	2.1	1.7	2.1	21.	21.	14.	14.	14.	15.	14.	10.	9.3	9.9	8.6	8.7	8.0	7.4	7.8	6.9	6.6	6.4	5.9	5.4	4.9	4.0	3.8	3.4	3.6
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	3.4
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	3.6
Kauai 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	4.5
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	4.2	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

April 2022 Highlights

	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	601,800	24,300	4.2%
Nat'l resources, mining & construction	36,900	-400	-1.1%
Manufacturing	12,300	600	5.1%
Wholesale trade	16,300	0	0.0%
Retail trade	64,300	2,700	4.4%
Transportation, warehousing & utilities	30,800	2,500	8.8%
Information	8,200	700	9.3%
Financial activities	26,300	-600	-2.2%
Professional & business service	68,900	1,000	1.5%
Educational service	13,700	900	7.0%
Healthcare & social assistance	71,000	-1,000	-1.4%
Arts, entertainment & recreation	10,000	1,400	16.3%
Accommodation	35,500	10,400	41.4%
Food service & drinking places	60,900	6,200	11.3%
Other service	25,100	1,200	5.0%
Federal government	34,600	-200	-0.6%
State government	68,800	-700	-1.0%
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

April	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,085,948	727,980	1,112,200	952,134	707,075	783,210	133,814	20,905	328,990
HONOLULU	574,380	370,909	683,614	478,716	350,720	400,619	95,664	20,189	282,995
KAHULUI	291,436	228,221	241,231	263,666	227,505	213,938	27,770	716	27,293
KONA	116,149	92,520	103,300	109,771	92,520	89,296	6,378	0	14,004
HILO	2,887	2,158	3,873	2,887	2,158	3,873	0	0	0
LIHU'E	101,096	34,172	80,182	97,094	34,172	75,484	4,002	0	4,698

May	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,053,607	823,693	1,104,245	954,871	802,165	814,220	98,736	21,528	290,025
HONOLULU	559,768	418,745	685,520	471,665	397,349	414,824	88,103	21,396	270,696
KAHULUI	271,962	243,005	228,732	261,329	242,873	219,464	10,633	132	9,268
KONA	116,591	107,706	106,089	116,591	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

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of May 23, 2022, subject to change

Scheduled Nonstop Seats to Hawai'i by Port Entry

June	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,059,310	980,170	1,166,887	961,299	959,533	888,904	98,011	20,637	277,983
HONOLULU	532,354	489,881	691,994	443,067	469,244	431,658	89,287	20,637	260,336
KAHULUI	292,637	278,205	265,892	283,913	278,205	257,829	8,724	0	8,063
KONA	124,989	124,659	114,157	124,989	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

July	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,248,709	1,175,933	1,237,099	1,052,034	1,149,908	935,384	196,675	26,025	301,715
HONOLULU	685,171	583,089	736,331	502,743	557,412	452,553	182,428	25,677	283,778
KAHULUI	312,055	345,407	281,408	301,422	345,059	273,254	10,633	348	8,154
KONA	137,173	140,019	119,878	133,559	140,019	110,095	3,614	0	9,783
HILO	5,549	5,549	5,146	5,549	5,549	5,146	0	0	0
LIHU'E	108,761	101,869	94,336	108,761	101,869	94,336	0	0	0

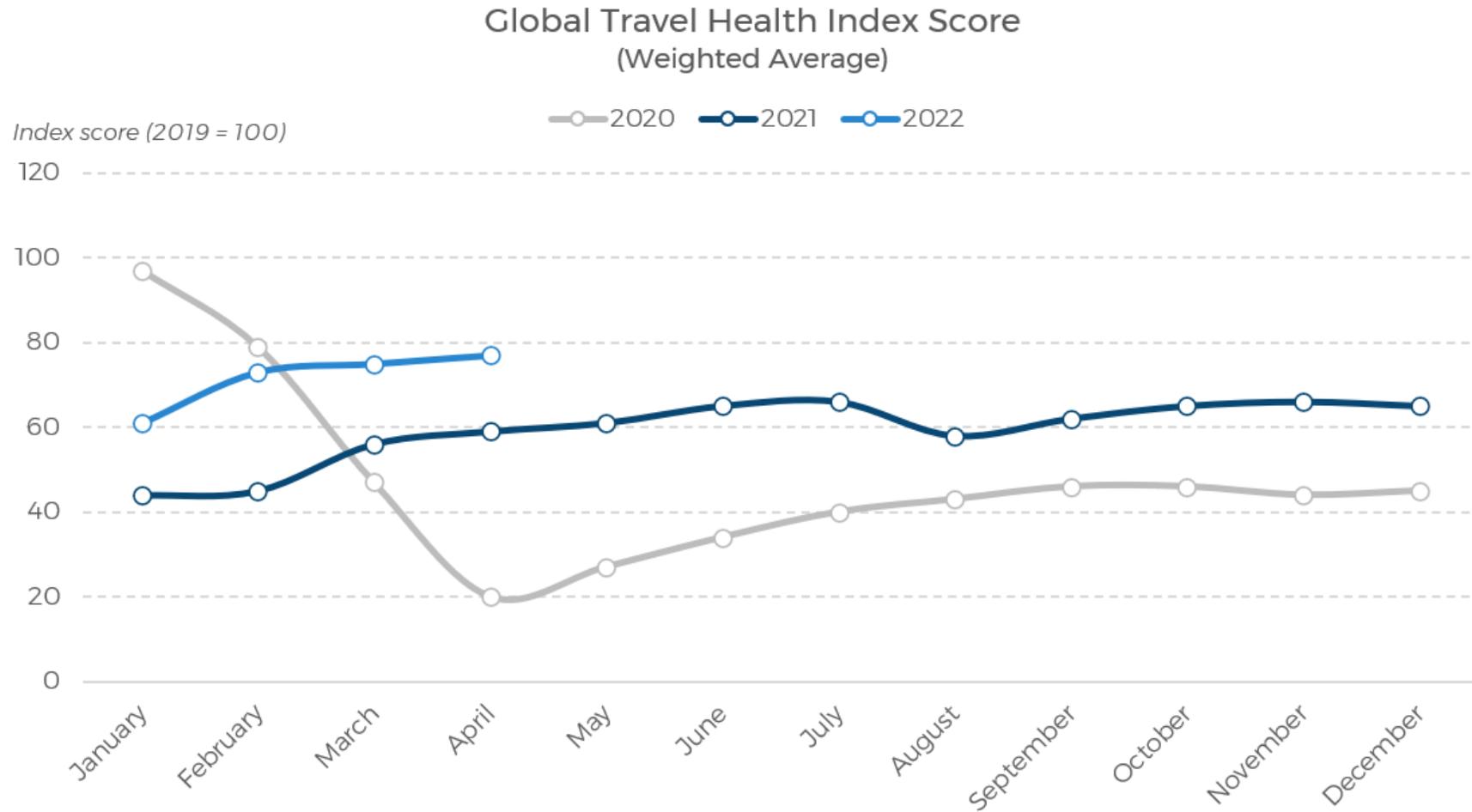
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of May 23, 2022, subject to change

Scheduled Nonstop Seats to Hawai'i From Japan

	May			June			July		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
JAPAN	20,509	7,870	161,248	23,534	7,686	155,388	97,499	9,626	165,392
Fukuoka			1,808				4,726		
Nagoya			12,607			13,724			14,415
Osaka	1,112	1,112	35,768	1,390	1,112	33,374	8,659	1,390	30,573
Sapporo			3,892			3,614	3,614		3,614
Tokyo HND	6,748	3,144	24,862	7,678	2,960	24,060	38,296	3,764	24,862
Tokyo NRT	12,649	3,614	82,311	14,466	3,614	80,616	42,204	4,472	91,928

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of May 23, 2022, subject to change

Skift Travel Health Index April 2022 = 77

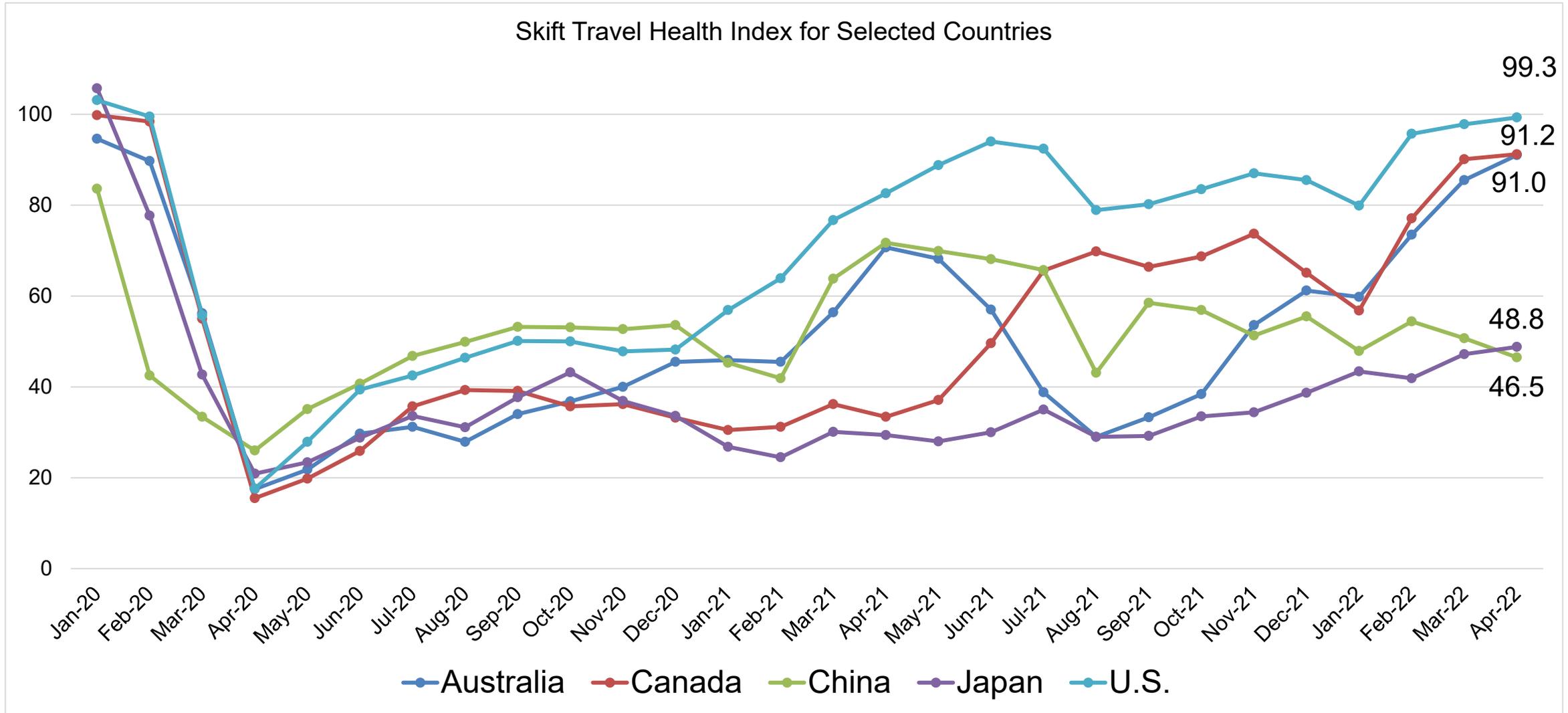


Source: Skift Research from partner data. All data vs same month in 2019.



Source: Skift Research

Skift Travel Health Index by Country



Source: Skift Research

Pacific Asia Travel Association COVID-19 Update & Recovery Dashboard

DESTINATION	LOCKDOWN STATUS	INBOUND TRAVEL	OUTBOUND TRAVEL	VACCINATION RATE
AUSTRALIA	OPEN	OPEN	OPEN	21,592,267 (83.7%)
BHUTAN	OPEN	OPEN	OPEN	671,861 (86.2%)
CAMBODIA	OPEN	OPEN	OPEN	14,192,815 (83.8%)
CHINA	PARTIAL	RESTRICTED	RESTRICTED	1,252,592,000 (86.7%)
HONG KONG SAR	PARTIAL	PARTIAL	OPEN	6,253,254 (82.8%)
INDIA	OPEN	PARTIAL	PARTIAL	880,383,946 (63.2%)
INDONESIA	PARTIAL	OPEN	OPEN	1166,764,720 (60.3%)
JAPAN	PARTIAL	RESTRICTED	PARTIAL	101,896,169 (80.8%)
KOREA (ROK)	OPEN	OPEN	OPEN	44,569,425 (86.9%)
LAO PDR	OPEN	OPEN	OPEN	4,977,532 (68.4%)
MACAO, CHINA	OPEN	PARTIAL	PARTIAL	571,541 (86.8%)
MALAYSIA	OPEN	OPEN	OPEN	26,993,161 (82.4%)
MALDIVES	OPEN	OPEN	OPEN	384,016 (70.6%)
PHILIPPINES	PARTIAL	OPEN	OPEN	68,912,256 (62.1%)
SINGAPORE	OPEN	OPEN	OPEN	4,985,869 (91.4%)
SRI LANKA	OPEN	OPEN	OPEN	14,465,233 (67.3%)
THAILAND	PARTIAL	OPEN	OPEN	52,103,543 (74.5%)
USA	OPEN	OPEN	OPEN	220,914,142 (67.0%)
VIETNAM	OPEN	OPEN	OPEN	78,673,094 (80.1%)

Lockdown status:

Open – no restrictions on capacities, all economic sectors open - but face mask-wearing may still be imposed.

Partial – some restrictions are in place - that could be certain school classes, nightclubs/ bars, certain economic sectors, limits on the number of people in gatherings, etc.

Restricted – closure of all non-essential businesses, restricted movement.

Inbound travel:

Open – leisure tourism permitted for majority of inbound travellers, although testing/ pre-registration/ visas may be required.

Partial – leisure tourism may be permitted, either to certain parts of the country or for certain nationalities to enter the country only. Could also apply to certain "Green Lane" schemes.

Restricted – leisure tourism not permitted.

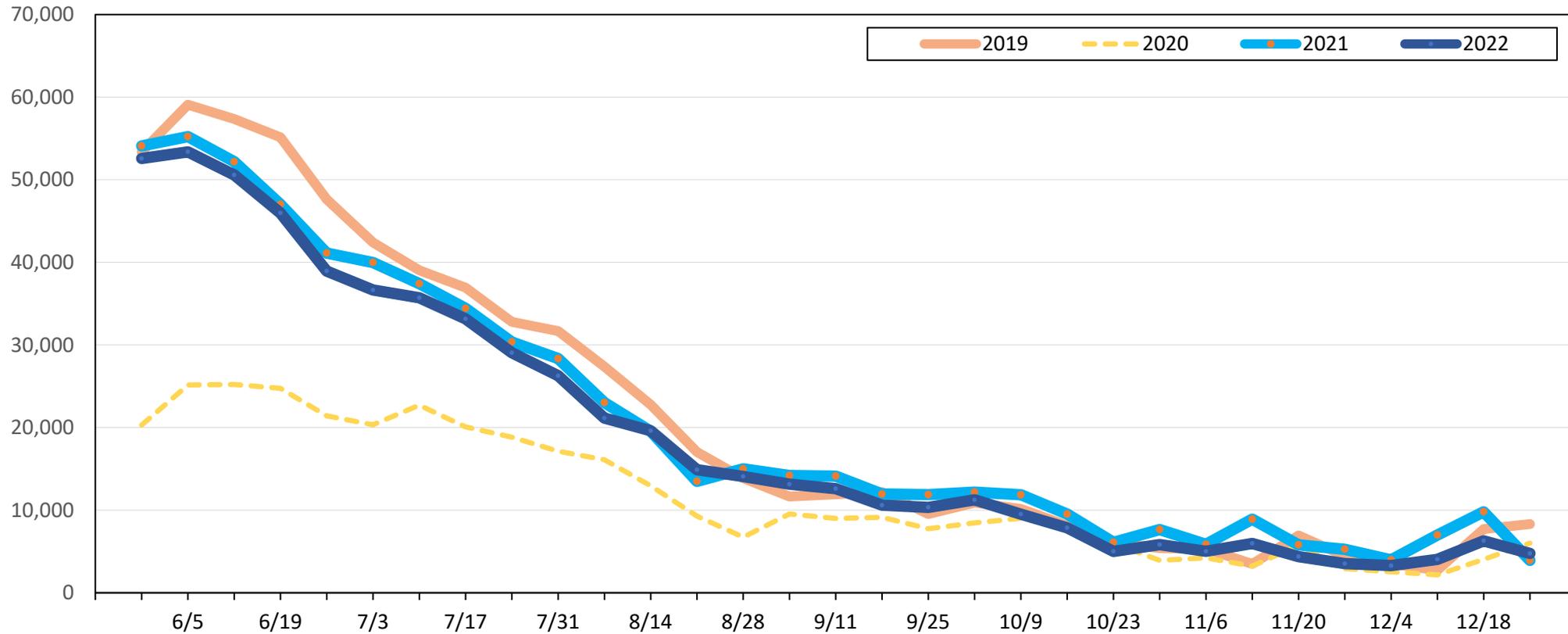
Closed – all entry not permitted.

Source: Copyright © 2022 Pacific Asia Travel Association, as of May 25, 2022

TRAVEL AGENCY BOOKING TRENDS

Travel Agency Bookings to Hawai'i for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022 U.S.

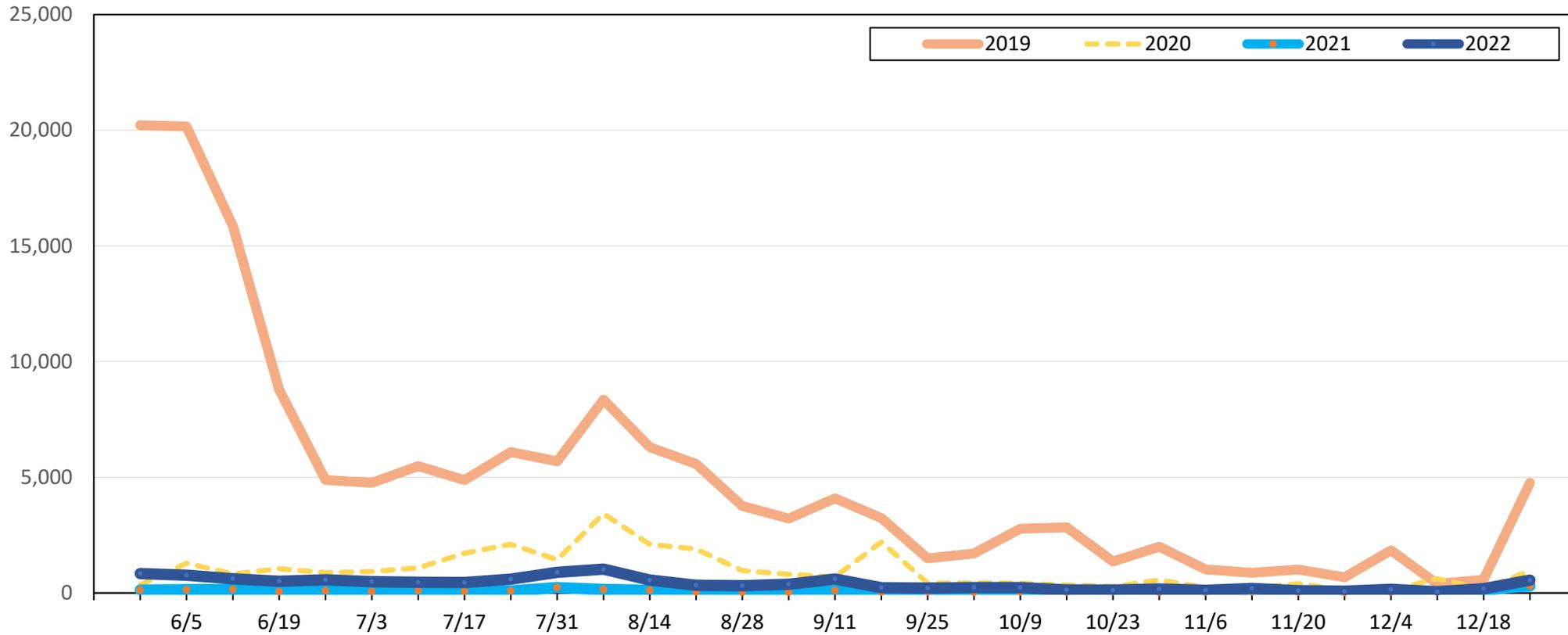


Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022 Japan

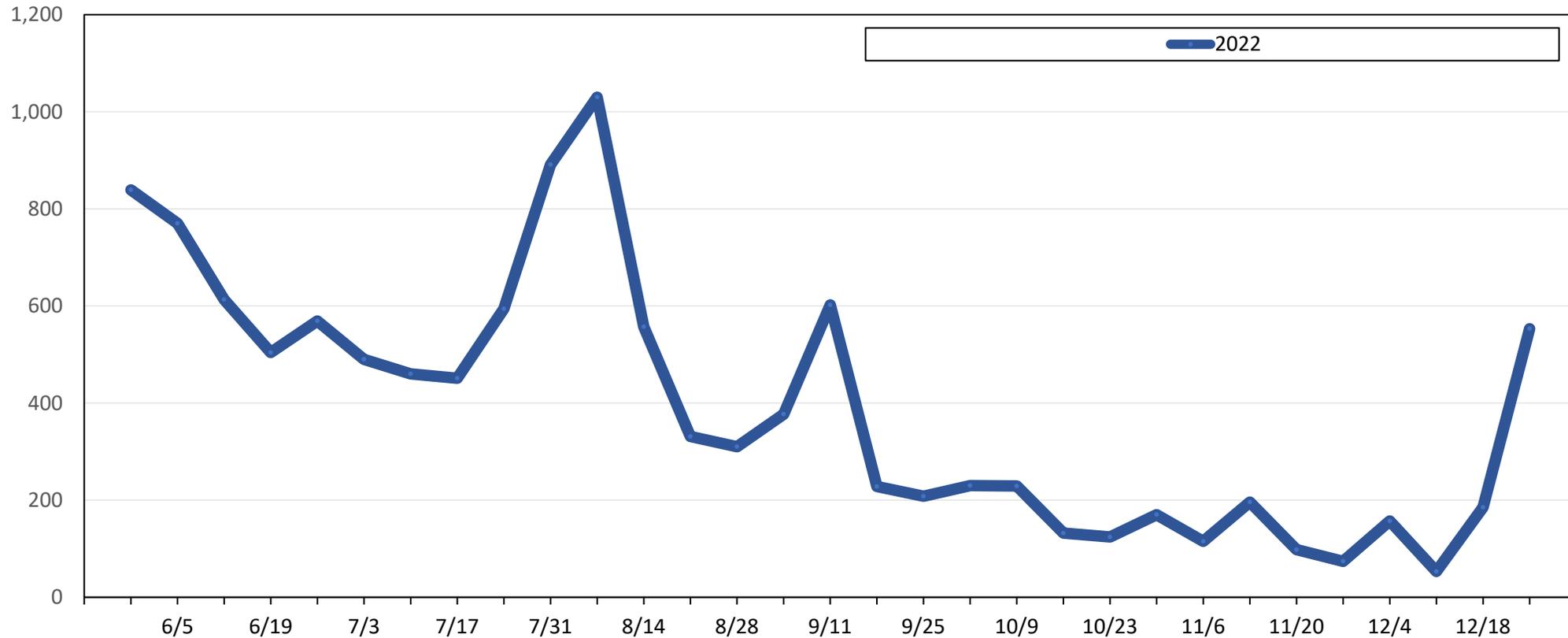


Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022 Japan

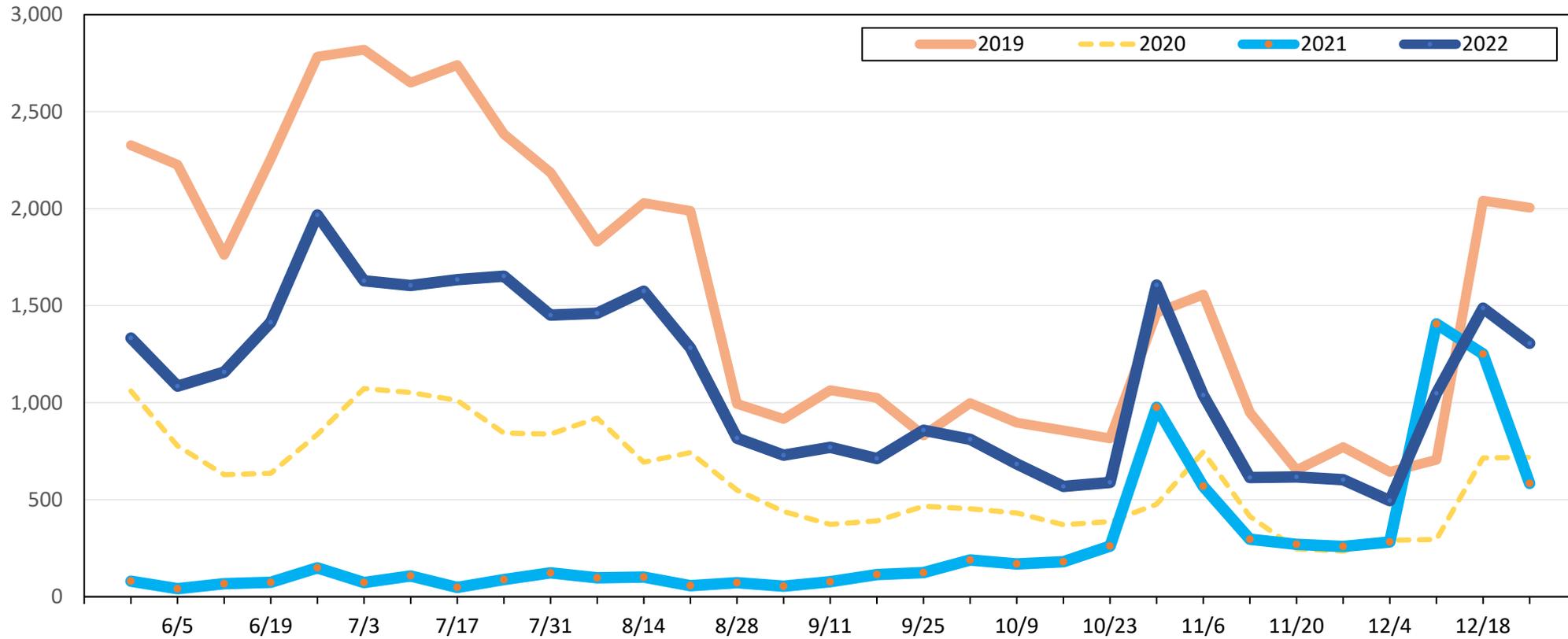


Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022
Canada

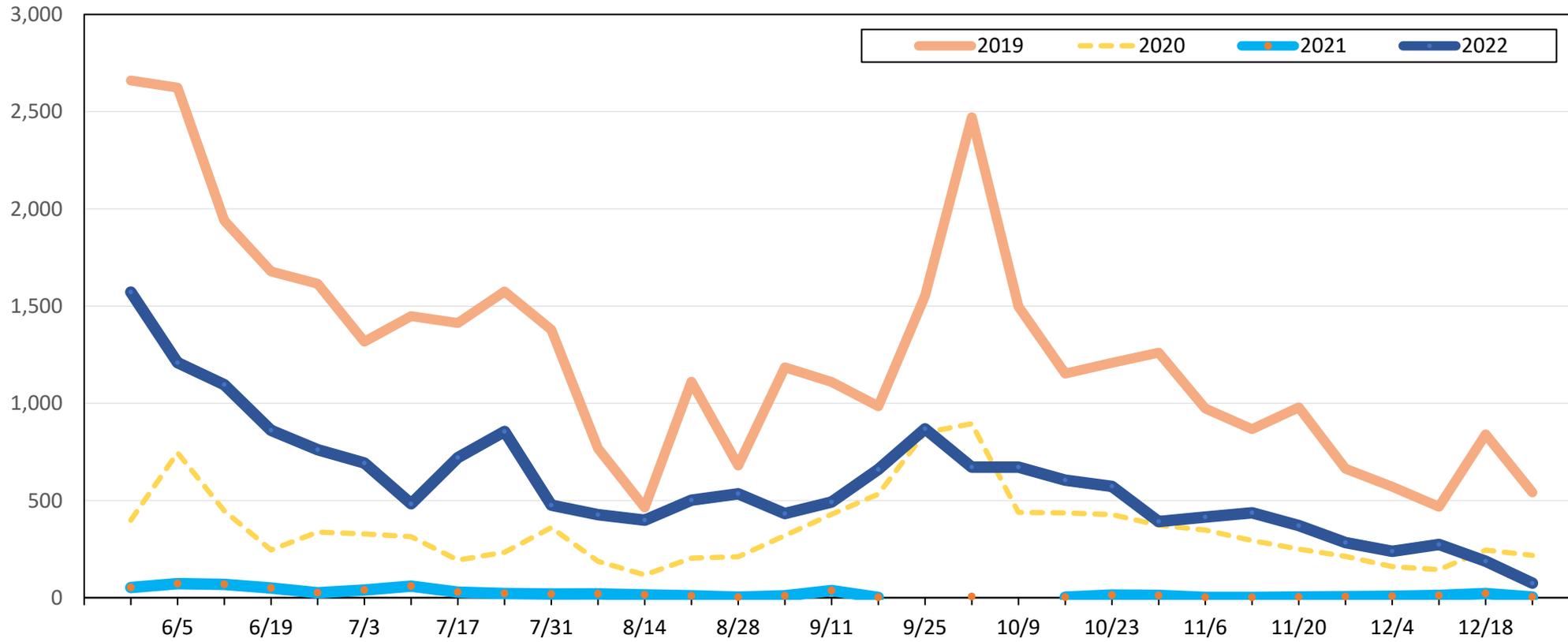


Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022
Korea

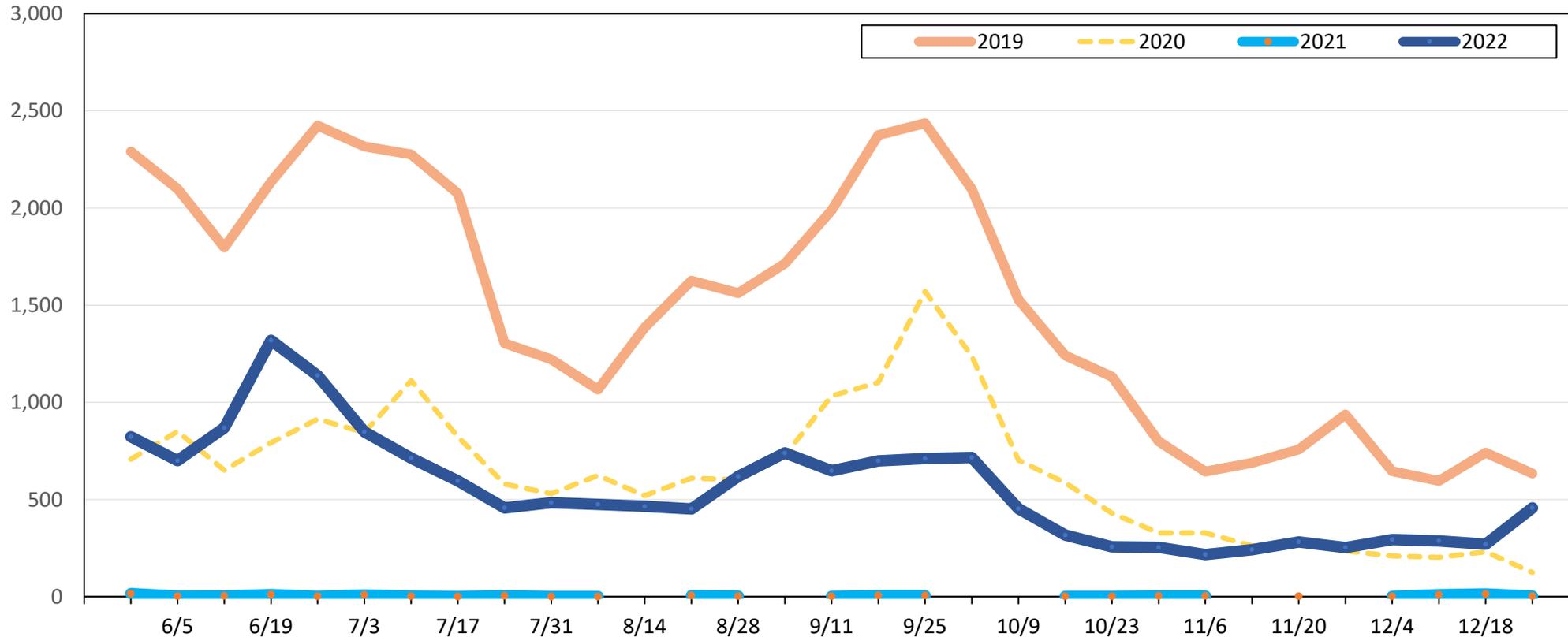


Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of May 21, 2022
Australia



Source: Global Agency Pro, as of May 21, 2022

Source: Global Agency Pro

MAHALO!

