



Market Insights – April 2022

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In April 2022, there were no travel restrictions for passengers arriving on U.S. mainland flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

For the first four months of 2022, Hawai'i's tourism economy experienced:

- Total visitor spending was \$5.83 billion, up slightly (+0.3%) from \$5.81 billion in the first four months of 2019.
- A total of 2,812,030 visitors arrived in the first four months of 2022 which was a decrease compared to the first four months of 2019 at 3,376,675 visitors (-16.7%).
- For FY2022 Through April 2022, the state collected \$597.0 million in TAT, up 17.9 percent compared to \$506.2 million collected in FY 2019 through April 2019 (Preliminary data from Dept of Taxation).
- There were 20,171 trans-Pacific flights and 4,223,132 seats in the first four months of 2022, compared to 20,245 flights and 4,449,480 seats in the first four months of 2019.

Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD April 2022 vs. YTD April 2021

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	143.0%	2,399.1	5,828.8	16,620.5
Daily Spend (\$PPPD)	27.9%	173.2	221.5	206.0
Visitor Days	90.0%	13,847,827	26,313,938	80,674,664
Arrivals	111.3%	1,331,115	2,812,030	8,867,698
Daily Census	90.0%	115,399	219,283	221,026
Airlift (scheduled seats)	68.0%	2,509,653	4,215,758	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available.

Table 2: Overall Key Performance Indicators – Total (Air + Cruise) – YTD April 2022 vs. YTD April 2019

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	0.3%	5,812.1	5,828.8	16,620.5
Daily Spend (\$PPPD)	13.6%	195.0	221.5	206.0
Visitor Days	-11.7%	29,812,910	26,313,938	80,674,664
Arrivals	-16.7%	3,376,675	2,812,030	8,867,698
Daily Census	-11.7%	248,441	219,283	221,026
Airlift (scheduled seats)	-4.6%	4,417,397	4,215,758	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Figure 1: Monthly Visitor Expenditures (\$mil) – 2022 vs. 2021

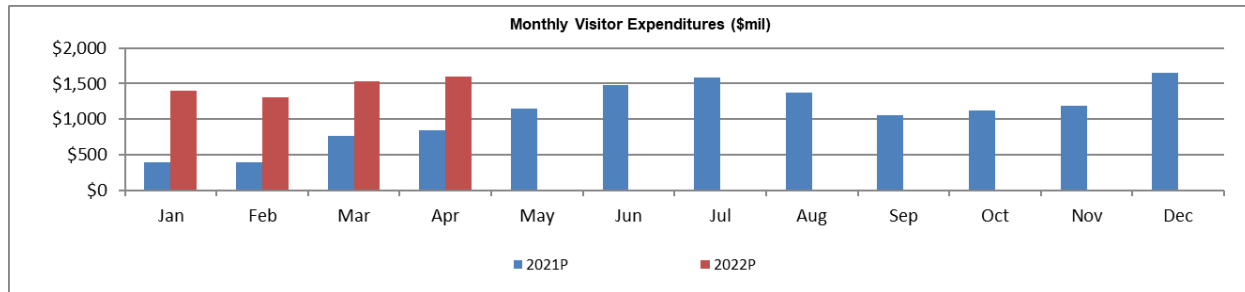
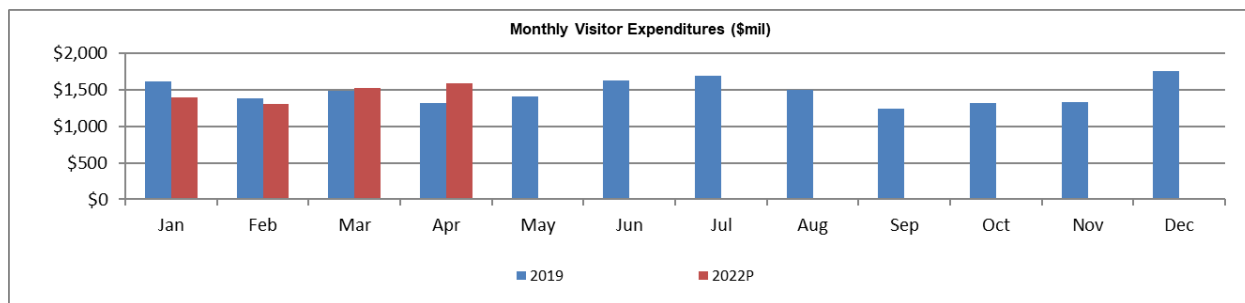


Figure 2: Monthly Visitor Expenditures (\$mil) – 2021 vs. 2019



Major Market Areas (MMAs)

USA

Table 3: Key Performance Indicators - U.S. Total (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	121.4%	2,293.3	5,076.5	13,988.8
Daily Spend (\$PPPD)	31.6%	172.9	227.6	201.3
Visitor Days	68.2%	13,261,460	22,307,796	69,490,874
Arrivals	90.7%	1,292,183	2,463,763	7,666,485
Daily Census	68.2%	110,512	185,898	190,386
Airlift (scheduled seats)	55.1%	2,413,366	3,743,919	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 4: Key Performance Indicators - U.S. Total (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	36.9%	3,707.2	5,076.5	13,988.8
Daily Spend (\$PPPD)	20.6%	188.6	227.6	201.3
Visitor Days	13.5%	19,651,460	22,307,796	69,490,874
Arrivals	13.8%	2,164,304	2,463,763	7,666,485
Daily Census	13.5%	163,762	185,898	190,386
Airlift (scheduled seats)	22.5%	3,057,138	3,743,919	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- With solid job growth and the unemployment rate near a half-century low, the April 2022 job gains (+428,000) were most notable in leisure and hospitality. The jobs report covers a full month after the beginning of the Russia-Ukraine war and shows that the U.S. economy is slowing on the war's drag but is not in outright decline.
- The Conference Board Consumer Confidence Index decreased slightly in April 2022, after an increase in March. The Index now stands at 107.3 (1985=100) up from 107.6 in March.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for May-July 2022 will increase by +3.2 percent as compared with the same period in 2021. The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue for both the U.S. West (+5.6%) and U.S. East (-12.9%). The situation is being monitored and the forecast adjusted accordingly.
- According to MMGY Travel Intelligence, 73 percent of American travelers intend to take a vacation in the next six months, up significantly from 62 percent one year ago. It is anticipated that 2022 will be a year of continued growth for the travel industry, although inflation and the recent increase in gas prices may alter spending slightly.
- According to the latest Longwoods International tracking study of American travelers, the recent modest increase in coronavirus cases nationally is not deterring travel planning in 2022. Only 19 percent of travelers say that COVID-19 will greatly impact their travel decisions in the next six months, the lowest level since the beginning of the pandemic more than two years ago, barring a major reversal in the course of the pandemic. Concerns about gas prices and other inflationary pressure on costs have become a more significant challenge even as pandemic fears recede.

US WEST

Table 5: Key Performance Indicators - U.S. West (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	104.4%	1,555.9	3,180.2	8,781.5
Daily Spend (\$PPPD)	30.6%	169.5	221.4	194.1
Visitor Days	56.5%	9,178,963	14,361,252	45,239,109
Arrivals	80.6%	925,145	1,670,887	5,183,426
Daily Census	56.5%	76,491	119,677	123,943
Airlift (scheduled seats)	55.2%	2,132,959	3,310,110	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 6: Key Performance Indicators - U.S. West (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	45.8%	2,181.5	3,180.2	8,781.5
Daily Spend (\$PPPD)	24.8%	177.5	221.4	194.1
Visitor Days	16.9%	12,290,140	14,361,252	45,239,109
Arrivals	17.9%	1,417,512	1,670,887	5,183,426
Daily Census	16.9%	102,418	119,677	123,943
Airlift (scheduled seats)	24.1%	2,666,749	3,310,110	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- In April 2022, 514,878 visitors arrived by air from the U.S. West, an increase of 32.5 percent compared to 388,573 visitors in April 2019. U.S. West visitors spent \$940.9 million in April 2022, up 72 percent from \$547 million in April 2019. Daily spending by U.S. West visitors in April 2022 (\$223 per person) was much higher compared to April 2019 (\$171 per person, +30.4%).
- Through the first four months of 2022 there were 1,670,887 visitors from the U.S. West compared to 1,417,512 visitors (+17.9%) in the first four months of 2019. U.S. West visitors spent \$3.18 billion in the first four months of 2022 compared to \$2.18 billion (+45.8%) in the first four months of 2019.

US EAST

Table 7: Key Performance Indicators - U.S. East (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	157.1%	737.5	1,896.3	5,207.4
Daily Spend (\$PPPD)	32.1%	180.6	238.6	214.7
Visitor Days	94.6%	4,082,497	7,946,544	24,251,765
Arrivals	116.0%	367,038	792,876	2,483,059
Daily Census	94.6%	34,021	66,221	66,443
Airlift (scheduled seats)	54.7%	280,407	433,809	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 8: Key Performance Indicators - U.S. East (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	24.3%	1,525.7	1,896.3	5,207.4
Daily Spend (\$PPPD)	15.1%	207.3	238.6	214.7
Visitor Days	7.9%	7,361,321	7,946,544	24,251,765
Arrivals	6.2%	746,793	792,876	2,483,059
Daily Census	7.9%	61,344	66,221	66,443
Airlift (scheduled seats)	11.1%	390,389	433,809	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- There were 188,868 visitors from the U.S. East in April 2022, an 18.7 percent growth compared to 159,115 visitors in April 2019. U.S. East visitors spent \$422.9 million in April 2022, up 47.5 percent from \$286.8 million in April 2019. Daily spending by U.S. East visitors in April 2022 (\$242 per person) increased in comparison to April 2019 (\$200 per person, +20.9%).
- Through the first four months of 2022, 792,876 visitors arrived from the U.S. East, compared to 746,793 visitors (+6.2%) in the first four months of 2019. U.S. East visitors spent \$1.90 billion in the first four months of 2022 compared to \$1.53 billion (+24.3%) in the first four months of 2019.

JAPAN

Table 9: Key Performance Indicators – Japan (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	202.5%	15.5	46.8	805.1
Daily Spend (\$PPPD)	5.8%	208.1	220.1	254.2
Visitor Days	186.0%	74,367	212,723	3,167,750
Arrivals	269.8%	4,277	15,817	521,380
Daily Census	186.0%	620	1,773	8,679
Airlift (scheduled seats)	81.0%	39,515	71,506	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 10: Key Performance Indicators – Japan (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-93.2%	688.1	46.8	805.1
Daily Spend (\$PPPD)	-7.7%	238.3	220.1	254.2
Visitor Days	-92.6%	2,886,779	212,723	3,167,750
Arrivals	-96.8%	494,416	15,817	521,380
Daily Census	-92.6%	24,056	1,773	8,679
Airlift (scheduled seats)	-89.2%	664,654	71,506	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- There were 6,749 visitors from Japan in April 2022 compared to 119,487 visitors (-94.4%) in April 2019. Visitors from Japan spent \$15.3 million in April 2022 compared to \$164 million (-90.7%) in April 2019. Daily spending by Japanese visitors in April 2022 (\$231 per person) decreased compared to April 2019 (\$234 per person, -1.3%).
- Through the first four months of 2022 there were 15,817 visitors from Japan compared to 494,416 visitors (-96.8%) in the first four months of 2019. Visitors from Japan spent \$46.8 million in the first four months of 2022 compared to \$688.1 million (-93.2%) in the first four months of 2019.
- On April 1, 2022, Ministry of Foreign Affairs of Japan (MOFA) eased travel advisory from Level 3 “Avoid All Travel” to Level 2 “Avoid Non-essential Travel” for 106 countries, including the U.S., for the first time since 2020. This is a big step for Japanese travel agencies to start selling package tours. From April 10, Japan will increase its daily new entry capacity up to 10,000 passengers.
- The depreciation of the yen is progressing rapidly, and on April 28, 2022, it temporarily reached the 131-yen level as 20 years ago. The inflation rate in April averaged 2 percent for the first time in about seven years due to influence of the situation in Ukraine.
- Nikkei NEEDS predicts Japan GDP growth rate in 2022 to be 1.9 percent. In the first quarter of 2022, the growth rate was -0.2 percent, however, it is expected to pick up from April 2022, with increase of personal travel.
- According to Japan National Tourism Organization (JNTO), the number of Japanese departures in March 2022 was 70,700, a significant increase of about 1.5 times compared to March 2021. The major factors are the relaxation of border measures and increase in the maximum number of entries.
- With the relaxation of border measures in Japan and the reduction of the travel advisory level, travel agencies are starting to sell Hawai'i's travel products. JTB, JALPAK, and ANA X have started selling their tour packages from April 15, 24, 29 respectively. HIS will start to sell one of their major packages CIAO from May 1. Kintetsu will resume selling their tours from June 1, 2022.
- During Golden Week, reservation of international flights for Hawai'i, carrier bookings increased from 90 to 100 percent in business class and 40 percent to 85 percent in economy class. A total of approximately 7,000 people were booked for Hawai'i for the Golden week.

- Crude oil price has been soaring. The surcharges for tickets issued in June 2022 are currently at 23,600 yen for JAL and 23,800 yen for ANA for Hawai'i routes.
- ANA announced the resumption of Narita-Honolulu flights twice a week for the A380 FLYING HONU (520 seats) from July 2022.
- In April 2022, there were a total of 87 flights with 20,263 seats by four airlines (ANA, Hawaiian, JAL, and ZIPAIR), according to Diio Mi flight schedules

CANADA

Table 11: Key Performance Indicators – Canada (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	1652.7%	20.1	353.1	426.6
Daily Spend (\$PPPD)	7.2%	165.3	177.3	173.6
Visitor Days	1534.3%	121,866	1,991,678	2,457,615
Arrivals	3439.5%	4,243	150,180	194,619
Daily Census	1534.3%	1,016	16,597	6,733
Airlift (scheduled seats)	2221.2%	10,948	254,125	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 12: Key Performance Indicators – Canada (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-36.8%	558.4	353.1	426.6
Daily Spend (\$PPPD)	6.7%	166.1	177.3	173.6
Visitor Days	-40.8%	3,362,088	1,991,678	2,457,615
Arrivals	-44.4%	269,939	150,180	194,619
Daily Census	-40.8%	28,017	16,597	6,733
Airlift (scheduled seats)	-5.8%	269,770	254,125	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- In April 2022, 43,107 visitors arrived from Canada compared to 56,749 visitors (-24%) in April 2019. Visitors from Canada spent \$88.8 million in April 2022, compared to \$100.2 million (-11.3%) in April 2019. Daily spending by Canadian visitors in April 2022 (\$182 per person) increased compared to April 2019 (\$154 per person, +18.1%).
- Through the first four months of 2022 there were 150,180 visitors from Canada compared to 269,939 visitors (-44.4%) in the first four months of 2019. Visitors from Canada spent \$353.1 million in the first four months of 2022, compared to \$558.4 million (-36.8%) in the first four months of 2019.
- Canada's economy is projected to expand 4.4 percent in 2022. The preliminary estimate for March in real GDP growth is 0.5 percent. This would mean the Canadian economy grew by 1.4 percent in the first quarter of 2022, an impressive performance given the significant disruption caused by the Omicron variant.
- The loonie posted an average value of USD \$0.80 in 2021, a 9 percent increase over 2020 and the highest annual average recorded since 2014.
- The Index of Consumer Confidence increased by 4.5 points in April 2022 to reach 99.8. A solid economic recovery from the Omicron variant and the quick rebound in the labor market have boosted economic activity and increased consumer confidence. Although consumers are experiencing higher prices, they are increasingly more confident about the economy. However, affordability and future finances remain a key concern. Only 17.3 percent of survey respondents believe now is a good time to make a big purchase - a large contrast with the average sentiment of 31 percent in 2019.
- Canadians are saving more than they were prior to the pandemic but they're spending less on non-essential items. There's a tremendous desire to travel internationally, Canadians have money sitting

in bank accounts and pent-up demand is strong. According to Canada's Consumer Price Index report, Canadians are paying more for dining out, hotel rooms, and flights. In March 2022, prices for services rose 4.3 percent on a year-over-year basis, up from a 3.8 percent increase in February 2022, as public health measures across Canada continued to ease.

- On April 1, 2022 the Government of Canada officially dropped its pre-entry COVID-19 testing requirements for all fully vaccinated travelers entering the country. Travel advisors say the changes have boosted consumer confidence after two years of pandemic-related border closures and lockdowns and they are seeing a surge in new bookings.

OCEANIA

Table 13: Key Performance Indicators – Oceania (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	3175.8%	2.2	72.4	298.2
Daily Spend (\$PPPD)	15.1%	232.8	267.9	275.3
Visitor Days	2745.8%	9,492	270,122	1,083,103
Arrivals	5653.3%	470	27,015	110,655
Daily Census	2745.8%	79	2,251	2,967
Airlift (scheduled seats)	N/A	0	47,223	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 14: Key Performance Indicators – Oceania (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-70.8%	247.6	72.4	298.2
Daily Spend (\$PPPD)	0.4%	266.8	267.9	275.3
Visitor Days	-70.9%	927,903	270,122	1,083,103
Arrivals	-72.8%	99,399	27,015	110,655
Daily Census	-70.9%	7,733	2,251	2,967
Airlift (scheduled seats)	-70.3%	158,779	47,223	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- Both Australia and New Zealand are seeing a sharp rise in the cost of living, with recent inflation rate announcements reflecting the highest levels for several decades. New Zealand has reached 6.9 percent inflation and Australia 5.1 percent.
- Cruise ships were allowed to return to Australian waters starting April 17, 2022, concluding a two-year ban due to the coronavirus pandemic.
- Around 50 percent of consumers are booking very close to their departure date (within 4 weeks), while the other half are booking way in advance (6 months +). This indicates there is still uncertainty around booking and travelling.
- Sustainable travel continues to be a trend and is becoming increasingly important to consumers.
- New Zealand flights still due to restart on July 4th (Hawaiian Airlines starting 7/4/2022 and Air New Zealand starting 7/5/2022).

OTHER ASIA

Table 15: Key Performance Indicators – Other Asia (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	426.7%	10.4	54.6	N/A
Daily Spend (\$PPPD)	19.6%	247.4	295.9	N/A
Visitor Days	340.5%	41,901	184,569	N/A
Arrivals	673.7%	2,140	16,560	N/A
Daily Census	340.5%	349	1,538	N/A
Airlift (scheduled seats)	562.9%	5,838	38,702	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 16: Key Performance Indicators – Other Asia (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-81.4%	294.2	54.6	N/A
Daily Spend (\$PPPD)	1.0%	293.0	295.9	N/A
Visitor Days	-81.6%	1,004,090	184,569	N/A
Arrivals	-86.5%	123,045	16,560	N/A
Daily Census	-81.6%	8,367	1,538	N/A
Airlift (scheduled seats)	-76.6%	165,205	38,702	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

KOREA

Table 17: Key Performance Indicators – Korea (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	378.1%	7.8	37.4	192.6
Daily Spend (\$PPPD)	13.5%	246.0	279.3	300.1
Visitor Days	321.1%	31,770	133,798	641,680
Arrivals	815.4%	1,213	11,106	80,957
Daily Census	321.1%	265	1,115	1,758
Airlift (scheduled seats)	562.9%	5,838	38,702	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 18: Key Performance Indicators – Korea (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-77.6%	167.1	37.4	192.6
Daily Spend (\$PPPD)	3.1%	270.8	279.3	300.1
Visitor Days	-78.3%	616,960	133,798	641,680
Arrivals	-85.8%	78,027	11,106	80,957
Daily Census	-78.3%	5,141	1,115	1,758
Airlift (scheduled seats)	-65.2%	111,168	38,702	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- South Korea's exports grew 12.6 percent from a year earlier to \$57.69 billion. April 2022 marked the 18th consecutive month the country's exports had logged a year-on-year expansion. Exports also posted double-digit growth for the 14th month in a row last month.
- In April 2022, the Korean won/dollar exchange rate was 1,235.31 (KRW/USD) which was slightly depreciated from the previous month's 1,221.74 (KRW/USD).
- Korea has recorded 86.8 percent vaccination rate and 64.5 percent booster rate as of April 30, 2022.

- On April 14, the South Korean government lifted its special travel advisory issued in March 2020 when the pandemic started. Twenty-two countries, including Singapore, Canada, Australia, and the Netherlands, and two regions, Guam and Saipan, were downgraded to the Level 1 travel warning. Except for Guam and Saipan, 129 countries, including the U.S., the U.K., Germany, and France, have been downgraded to Level 2. The first level travel warning requires travel caution and the second requires travel restraint.
- The previously stagnant South Korean tourism industry started to rapidly reenergize when the government announced plans to normalize international flights and ease regulations, such as exemptions from quarantine for overseas travelers. In addition, as social distancing was lifted from April 18, 2022, group travel reservations gradually increased. Overseas tour products also recorded significant sales growth.
- Airlift: Korean Air is operating 3 weekly flights. Asiana Airlines resumed operations on April 3, 2022, and is operating 3 times a week. Hawaiian Airlines is operating 4 weekly flights.

CHINA

Table 19: Key Performance Indicators – China (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	449.9%	1.6	8.9	N/A
Daily Spend (\$PPPD)	17.8%	288.4	339.8	N/A
Visitor Days	366.8%	5,620	26,236	N/A
Arrivals	607.4%	466	3,296	N/A
Daily Census	366.8%	47	219	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 20: Key Performance Indicators – China (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-91.0%	99.6	8.9	N/A
Daily Spend (\$PPPD)	3.1%	329.7	339.8	N/A
Visitor Days	-91.3%	302,061	26,236	N/A
Arrivals	-90.8%	35,791	3,296	N/A
Daily Census	-91.3%	2,517	219	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

- April 2022 month-end (ME) rate for Chinese Yuan (CNY) vs. USD was 6.62 vs. 6.34 March 2022 ME rate and April 2021 ME rate of 6.47.
- China's 2022 Q1 GDP stood at 27.02 trillion yuan (US\$4.3 trillion), per National Bureau of Statistics (NBS). Q1 2022 was +4.8% vs Q1 2021 (+18.3% vs. Q1 2020).
- In April 2022, China's manufacturing purchasing managers' Index (PMI) was 47.4, from 49.5 in March, according to the National Bureau of Statistics. The lower reading can be attributed to the lockdowns in April. A reading above 50 indicates an expansion in production.
- In Q1 2022, the unemployment rate was 5.5 percent, 0.1 percent higher than the same period last year. The surveyed urban unemployment rate in January and February were 5.3 percent and 5.5 percent respectively, down 0.1 percent and flat compared with the same period last year. In March, the pandemic situation worsened in some regions resulting in the surveyed urban unemployment rate rising to 5.8 percent, 0.3 percent higher than the previous month.
- As of April 30, 2022, more than 88.5 percent of the population had been fully vaccinated, according to the National Health Commission (NHC).

- In early May 2022, the Beijing government eased quarantine management measures for those whose port of entry is Beijing. The measure will be a "10-day concentrated quarantine + 7-day home quarantine" vs. the previous policy of a "14-day concentrated quarantine + 7-day home quarantine".
- Shenzhen has lifted a week-long lockdown with public transport back up and most businesses and factories back to work. Several cities, collectively home to more than 37 million residents, were placed under varying levels of lockdown in March. Many of those lockdowns eased by early April 2022. Shanghai begins to ease some of its week's long shutdown with about 6.6 million residents' population being able to go outdoors.
- Hong Kong has reopened borders for passengers arriving from Australia, Canada, France, India, Nepal, Pakistan, Philippines, United Kingdom, and United States and cut the inbound quarantine to seven days. The decision came into effect on April 1, 2022.
- China will focus on expanding domestic flights and restoring international air travel in 2023-2025, the Civil Aviation Administration of China (CAAC)'s aviation regulator said in January 2022, as it issued a new five-year development plan.

EUROPE

Table 21: Key Performance Indicators – Europe (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	877.4%	4.6	45.2	100.7
Daily Spend (\$PPPD)	-1.9%	149.5	146.7	158.4
Visitor Days	896.1%	30,912	307,904	635,609
Arrivals	1010.4%	1,897	21,064	47,332
Daily Census	896.1%	258	2,566	1,741
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 22: Key Performance Indicators – Europe (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-38.1%	73.0	45.2	100.7
Daily Spend (\$PPPD)	-6.0%	156.0	146.7	158.4
Visitor Days	-34.2%	467,685	307,904	635,609
Arrivals	-41.0%	35,704	21,064	47,332
Daily Census	-34.2%	3,897	2,566	1,741
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

LATIN AMERICA

Table 23: Key Performance Indicators – Latin America (YTD April 2022 vs. YTD April 2021)

	YOY Rate	YTD 2021	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	53.9%	3.8	5.9	N/A
Daily Spend (\$PPPD)	-56.3%	203.7	89.1	N/A
Visitor Days	252.0%	18,858	66,388	N/A
Arrivals	361.2%	1,273	5,872	N/A
Daily Census	252.0%	157	553	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

Table 24: Key Performance Indicators – Latin America (YTD April 2022 vs. YTD April 2019)

	YOY Rate	YTD 2019	YTD 2022	2022 Annual Forecast*
Visitor Spending (\$mil)	-72.9%	21.8	5.9	N/A
Daily Spend (\$PPPD)	-62.0%	234.3	89.1	N/A
Visitor Days	-28.6%	92,999	66,388	N/A
Arrivals	-32.6%	8,707	5,872	N/A
Daily Census	-28.6%	775	553	N/A
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2022 annual forecast (Quarter 1, 2022). N/A=Not available

ISLAND VISITATION:

- **Oahu:** There were 416,285 visitors to O’ahu in April 2022 compared to 487,367 visitors (-14.6%) in April 2019. Visitor spending was \$703.4 million compared to \$613.3 million in April 2019. The average daily census on O’ahu was 99,023 visitors in April 2022 compared to 109,204 visitors (-9.3%) in April 2019.

Through the first four months of 2022, there were 1,406,493 visitors to O’ahu compared to 1,954,398 visitors (-28.0%) in the first four months of 2019. For the first four months of 2022, total visitor spending was \$2.48 billion compared to \$2.60 billion (-4.3%) in the first four months of 2019.

- **Maui:** There were 254,398 visitors to Maui in April 2022 compared to 247,984 visitors (+2.6%) in April 2019. Visitor spending was \$496.7 million compared to \$398.6 million (+24.6%) in April 2019. The average daily census on Maui was 67,943 visitors in April 2022 compared to 63,280 visitors (+7.4%) in April 2019.

Through the first four months of 2022, there were 870,445 visitors to Maui compared to 974,943 visitors (-10.7%) in the first four months of 2019. For the first four months of 2022, total visitor spending was \$1.78 billion compared to \$1.73 billion (+3.1%) in the first four months of 2019.

- **Hawai’i Island:** There were 141,854 visitors to Hawai’i Island in March 2022, compared to 161,087 visitors (-11.9%) in March 2019. Visitor spending was \$217.3 million, compared to \$200.7 million (+8.2%) in March 2019. The average daily census on Hawai’i Island was 37,725 visitors in March 2022, which was very similar to the 37,520 visitors (+0.5%) in March 2019.

Through the first quarter of 2022, there were 375,031 visitors to Hawai’i Island, compared to 446,877 visitors (-16.1%) in the first quarter of 2019. Total visitor spending was \$652.0 million, compared to \$646.4 million (+0.9%) in the first quarter of 2019.

- **Kaua’i:** There were 115,578 visitors to Kaua’i in April 2022 compared to 106,181 visitors (+8.9%) in April 2019. Visitor spending was \$176.3 million compared to \$135.8 million (+29.8%) in April 2019. The average daily census on Kaua’i was 29,438 visitors in April 2022, up from 25,330 visitors (+16.2%) in April 2019.

Through the first four months of 2022, there were 395,379 visitors to Kaua’i compared to 439,643 visitors (-10.1%) in the first four months of 2019. For the first four months of 2022, total visitor spending was \$646.6 million compared to \$617.7 million (+4.7%) in the first four months of 2019.