

HTA REGULAR BOARD MEETING

Thursday, June 30, 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

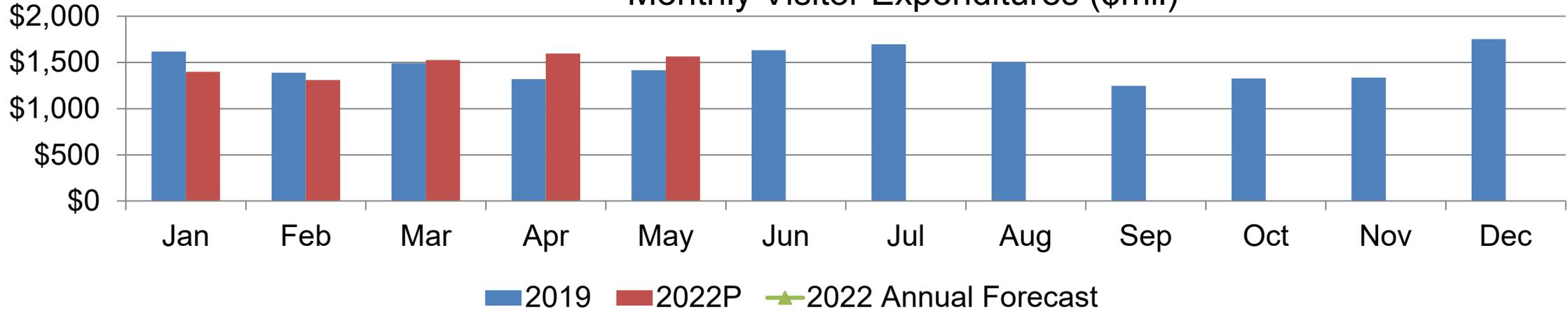
HAWAII TOURISM
AUTHORITY

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.

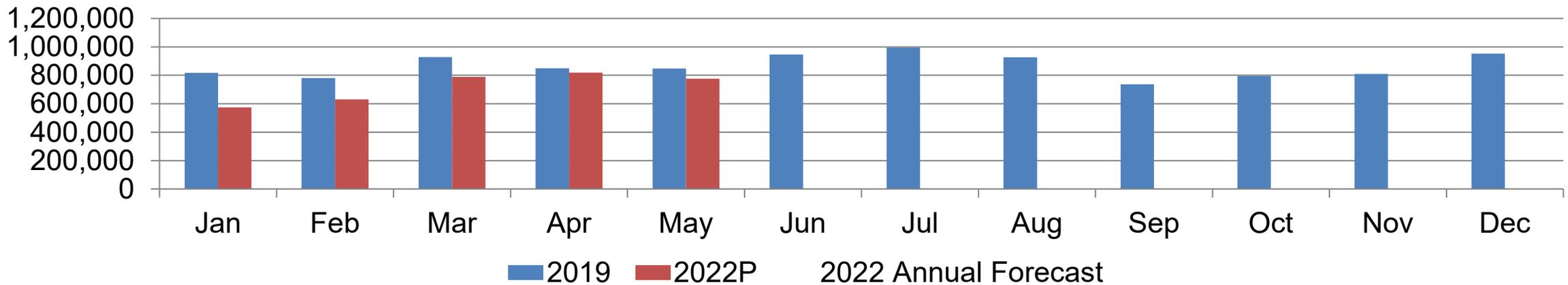
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

May 2022 Highlights

Monthly Visitor Expenditures (\$mil)



Monthly Arrivals



Note: 2022 figures are preliminary.

May 2022 Highlights

EXPENDITURES

(\$mil.)	2022P	2021P	2019
TOTAL (AIR)	1,563.8	1,144.7	1,409.3
U.S. West	782.7	715.5	564.0
U.S. East	550.3	380.9	392.4
Japan	15.6	4.9	162.4
Canada	55.4	2.0	48.3
All Others	159.8	41.4	242.2

PPPD

SPENDING (\$)	2022P	2021P	2019
TOTAL (AIR)	227.5	193.8	200.3
U.S. West	206.3	189.5	173.8
U.S. East	258.8	198.2	211.1
Japan	244.5	232.4	243.6
Canada	204.1	185.4	170.1
All Others	258.2	234.8	246.6

VISITOR ARRIVALS

	2022P	2021P	2019
TOTAL (AIR)	774,144	629,681	836,058
U.S. West	453,989	418,956	387,844
U.S. East	222,144	193,501	199,344
Japan	7,167	1,312	113,226
Canada	25,320	564	26,424
All Others	65,523	15,347	109,220

AVERAGE DAILY CENSUS

	2022P	2021P	2019
TOTAL (AIR)	221,727	190,491	226,963
U.S. West	122,358	121,773	104,660
U.S. East	68,587	62,004	59,951
Japan	2,054	677	21,507
Canada	8,762	355	9,163
All Others	19,967	5,682	31,683

Note: 2022 and 2021 figures are preliminary.

May 2022 Highlights

EXPENDITURES (\$mil.)	2022P	2021P	2019
O'ahu	732.1	527.9	691.1
Maui	454.3	350.2	400.4
Moloka'i	3.4	2.6	3.3
Lāna'i	12.2	9.1	10.5
Kaua'i	177.3	118.9	149.9
Hawai'i Island	184.5	135.9	154.2

PPPD SPENDING (\$)	2022P	2021P	2019
O'ahu	243.5	210.5	203.4
Maui	238.5	193.4	213.9
Moloka'i	198.3	158.1	161.6
Lāna'i	521.7	435.1	479.6
Kaua'i	204.6	189.0	190.5
Hawai'i Island	174.8	147.7	164.4

VISITOR ARRIVALS	2022P	2021P	2019
O'ahu	416,091	310,744	508,088
Maui	247,280	215,148	251,665
Moloka'i	3,164	2,253	5,008
Lāna'i	5,688	4,297	6,580
Kaua'i	115,243	73,018	112,106
Hawai'i Island	139,953	103,594	139,696

AVERAGE DAILY CENSUS	2022P	2021P	2019
O'ahu	96,975	80,895	109,584
Maui	61,441	58,412	60,389
Moloka'i	553	538	654
Lāna'i	755	677	704
Kaua'i	27,950	20,296	25,376
Hawai'i Island	34,054	29,673	30,255

Note: 2022 and 2021 figures are preliminary.

Hawai'i Airport Throughput

Throughput by Week

State: Hawaii; Airport: All



Hawaii Airports

Throughput for the last 6 months, % change compared to same month in 2019

	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22
Daniel K. Inouye International Airport	-33%	-37%	-33%	-23%	-15%	-19%
Kahului	-13%	-14%	-8%	1%	5%	0%
Ellison Onizuka Kona International Airport	-14%	-13%	-10%	1%	8%	7%
Lihue	-12%	-15%	-6%	-1%	9%	5%
Hilo International	-12%	-23%	-20%	-4%	-4%	0%

Source: TSA by Tourism Economics

May 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)	83.3%	84.7%	84.6%	84.6%	80.9%	81.7%	81.4%	81.9%	87.9%	95.1%
Honeymoon/Get Married	5.1%	4.8%	3.8%	2.2%	5.9%	3.4%	8.0%	11.4%	4.3%	1.6%
Honeymoon	4.5%	4.3%	3.1%	1.8%	5.3%	2.9%	7.6%	10.6%	4.1%	1.4%
Get Married	0.9%	0.8%	0.9%	0.5%	1.0%	0.6%	1.2%	1.8%	0.6%	0.2%
Pleasure/Vacation	78.9%	80.4%	81.5%	82.8%	75.8%	78.9%	75.0%	71.1%	84.1%	93.8%
Mtgs/Conventions/Incentive	4.6%	2.9%	2.9%	1.8%	6.5%	2.5%	3.5%	6.1%	7.7%	2.0%
Conventions	2.1%	1.2%	1.3%	1.0%	2.4%	1.5%	1.9%	0.5%	3.0%	1.2%
Corporate Meetings	1.2%	0.7%	0.8%	0.6%	1.9%	0.7%	0.5%	0.1%	1.5%	0.7%
Incentive	1.6%	1.1%	0.9%	0.2%	2.5%	0.4%	1.0%	5.5%	3.4%	0.2%
Other Business	2.7%	2.2%	2.8%	2.9%	2.9%	3.0%	0.9%	0.6%	2.3%	0.6%
Visit Friends/Rel.	10.5%	10.1%	11.2%	12.5%	11.0%	14.3%	8.7%	1.5%	2.8%	4.2%
Gov't/Military	1.0%	0.6%	0.7%	0.6%	1.8%	1.2%	0.0%	0.0%	0.1%	0.0%
Attend School	0.2%	0.2%	0.1%	0.1%	0.2%	0.1%	1.0%	0.5%	0.1%	0.1%
Sport Events	0.4%	2.5%	0.2%	1.3%	0.2%	1.4%	1.5%	9.6%	3.8%	1.1%
Other	3.7%	3.2%	3.6%	2.6%	4.0%	3.1%	8.1%	6.8%	1.6%	0.9%

Note: 2022 figures are preliminary.

May 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	56.6%	58.4%	51.7%	48.5%	60.5%	56.5%	58.4%	82.5%	56.7%	45.5%
Plan to stay in Condo	16.6%	16.7%	18.1%	18.7%	14.2%	14.0%	23.9%	13.2%	24.4%	32.5%
Plan to stay in Timeshare	8.4%	7.2%	9.3%	8.6%	7.7%	7.3%	16.6%	5.3%	8.5%	8.8%
Cruise Ship	0.9%	1.1%	0.4%	0.7%	2.0%	2.5%	0.0%	0.3%	1.0%	1.1%
Friends/Relatives	10.8%	12.2%	11.5%	15.3%	11.2%	16.0%	4.8%	1.2%	4.4%	5.8%
Bed & Breakfast	1.1%	1.2%	1.0%	1.2%	1.2%	1.5%	0.1%	0.2%	1.1%	1.5%
Rental House	11.8%	10.5%	12.4%	12.1%	12.3%	12.2%	1.5%	0.4%	11.6%	13.0%
Hostel	0.7%	0.8%	0.5%	0.7%	0.6%	0.9%	0.6%	0.1%	2.1%	1.8%
Camp Site, Beach	0.7%	0.7%	0.7%	0.8%	0.6%	0.7%	0.1%	0.0%	3.1%	1.9%
Private Room in Private Home**	1.1%	1.8%	1.0%	1.4%	1.0%	1.4%	0.6%	0.4%	3.4%	1.8%
Shared Room/Space in Private Home**	0.3%	0.5%	0.3%	0.5%	0.4%	0.5%	0.3%	0.3%	0.2%	0.6%
Other	2.0%	1.5%	2.0%	2.0%	2.2%	2.0%	2.1%	0.0%	1.3%	1.4%

Note: 2022 figures are preliminary.

May 2022 Highlights

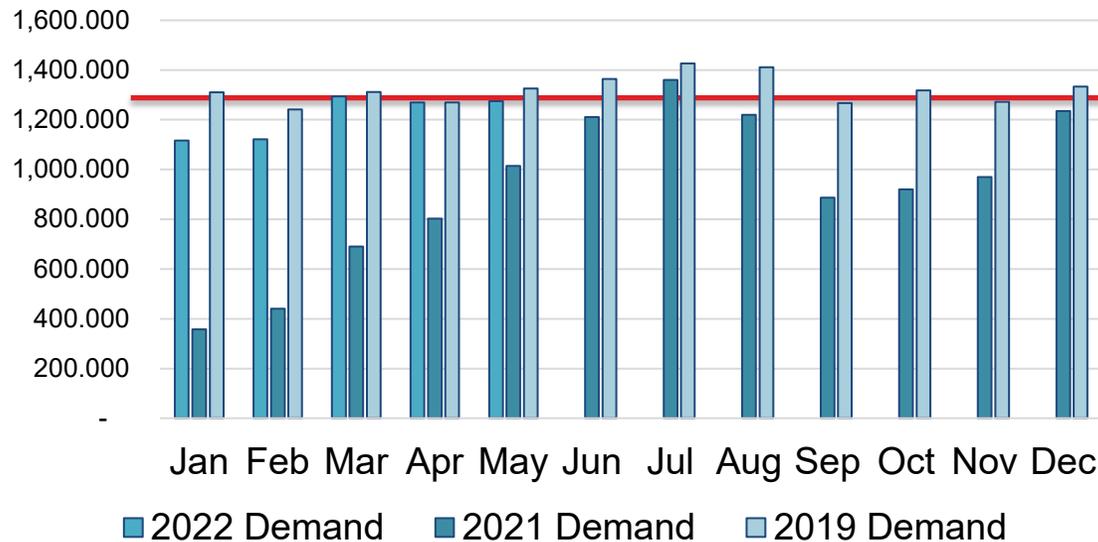
State of Hawai'i Hotel Performance

	2022	2021	2019
Occupancy	73.9%	61.3%	79.0%
ADR	\$340	\$288	\$255
RevPAR	\$251	\$176	\$202

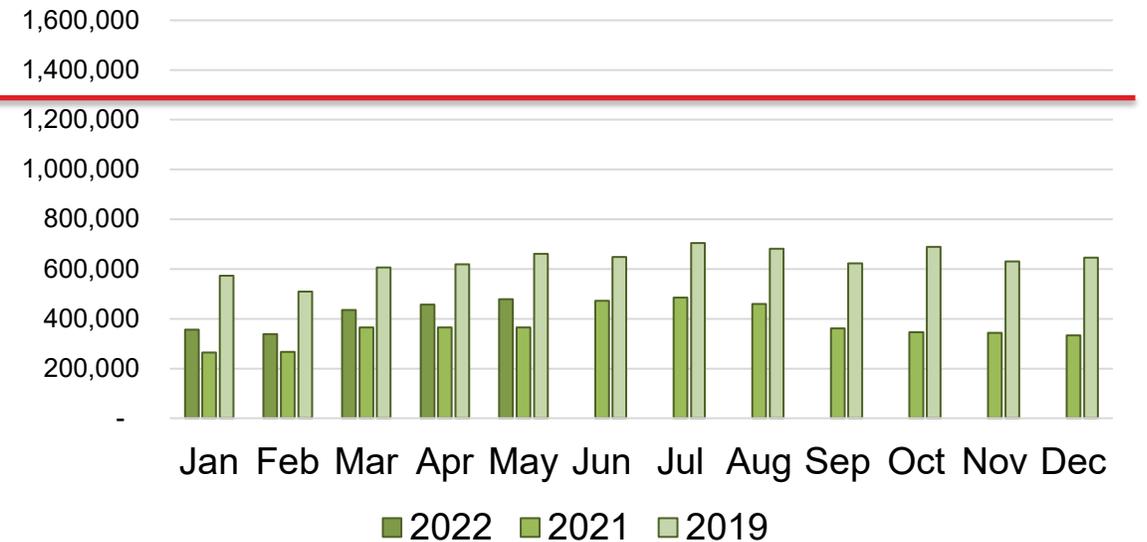
State of Hawai'i Vacation Rental Performance

	2022	2021	2019
Occupancy	69.4%	72.2%	71.2%
ADR	\$284	\$236	\$196

State of Hawai'i Hotel Demand



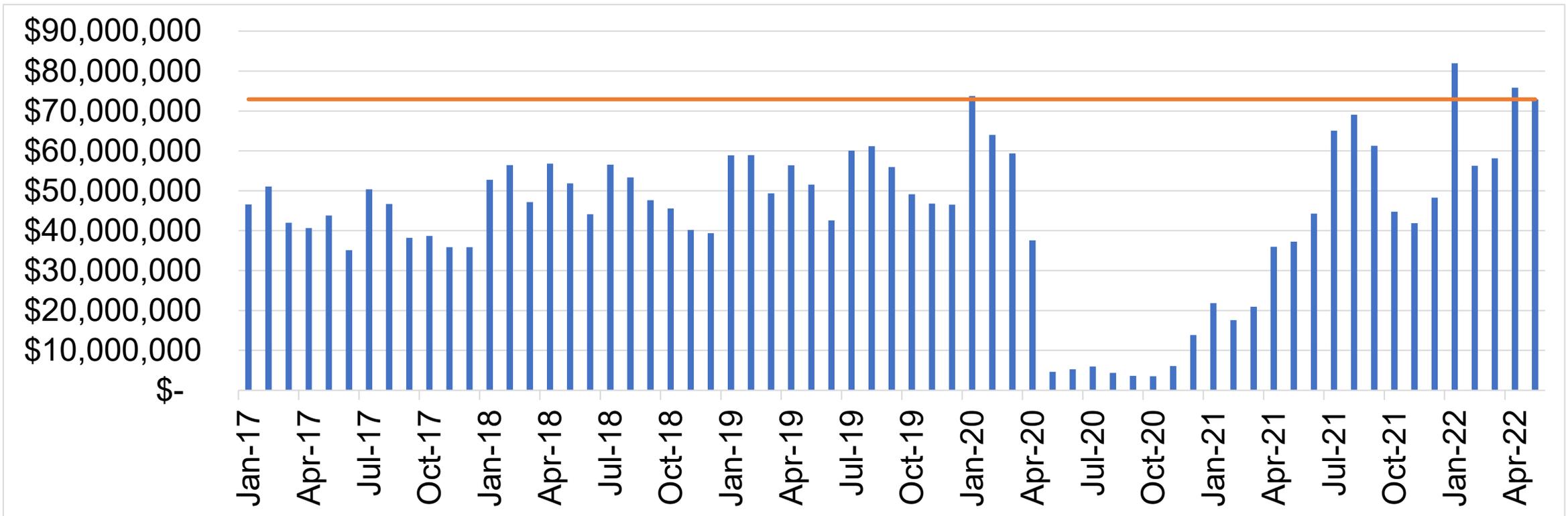
State of Hawai'i Vacation Rental Demand



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

May 2022 Highlights

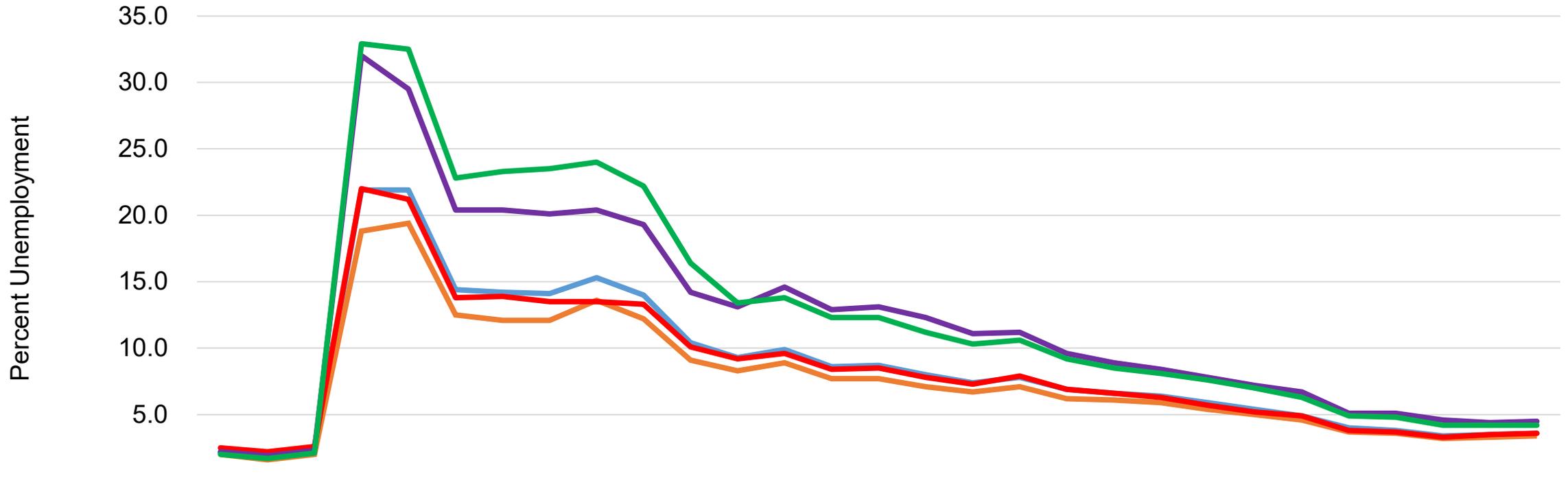
- Preliminary May TAT Collections: \$72.9 million
- Preliminary YTD Fiscal 22 TAT Collections: \$675.6 million (+295.0%)
- YTD Fiscal 21 TAT Collections: \$171.0 million (+\$504.6 million)



Source: Department of Taxation

May 2022 Highlights

Unemployment Rate, Civilian



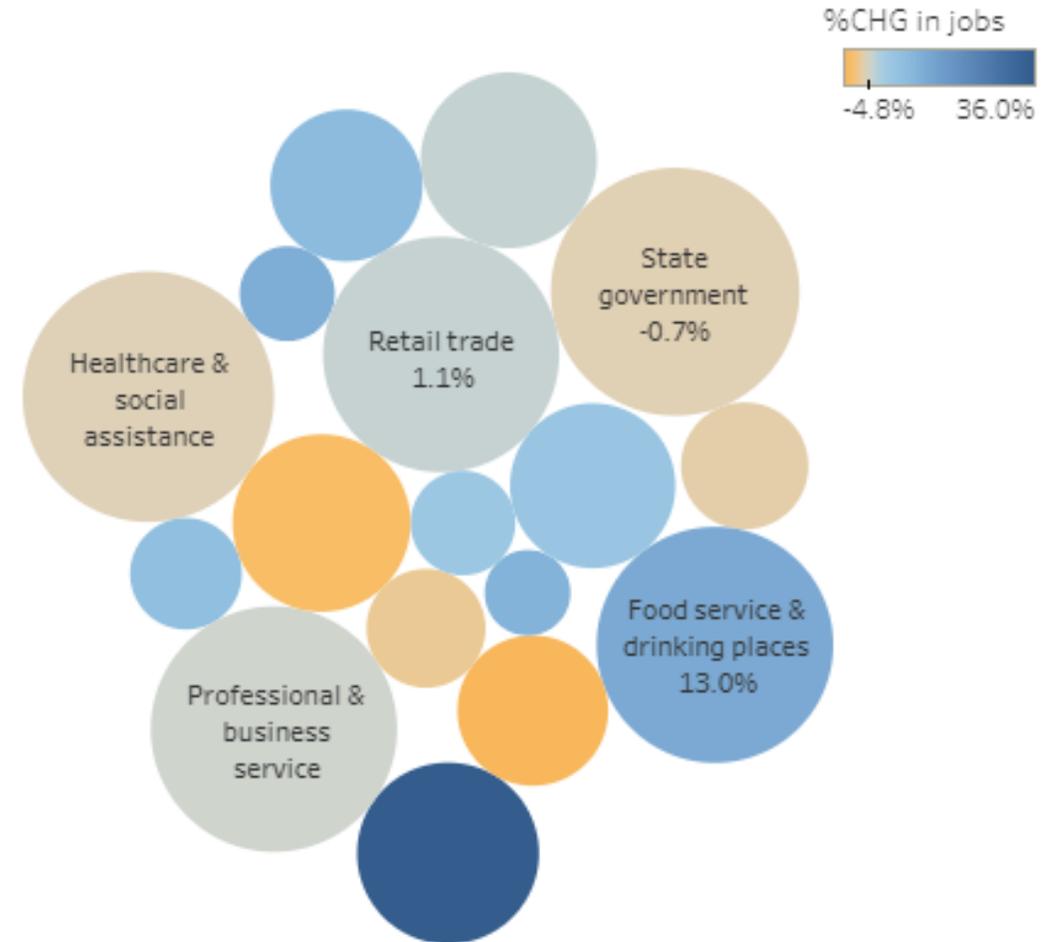
	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12	2021-01	2021-02	2021-03	2021-04	2021-05	2021-06	2021-07	2021-08	2021-09	2021-10	2021-11	2021-12	2022-01	2022-02	2022-03	2022-04	2022-05
State of Hawai'i	2.1	1.7	2.1	21.	21.	14.	14.	14.	15.	14.	10.	9.3	9.9	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	3.5	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	3.3	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	3.5	3.6
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	4.4	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	4.2	4.2

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

May 2022 Highlights

	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	606,300	21,800	3.7%
Nat'l resources, mining & construction	35,800	-1,400	-3.8%
Manufacturing	12,400	600	5.1%
Wholesale trade	16,000	-300	-1.8%
Retail trade	63,000	700	1.1%
Transportation, warehousing & utilities	30,900	1,600	5.5%
Information	8,300	800	10.7%
Financial activities	25,700	-1,300	-4.8%
Professional & business service	68,500	400	0.6%
Educational service	14,100	1,000	7.6%
Healthcare & social assistance	71,300	-400	-0.6%
Arts, entertainment & recreation	10,200	1,100	12.1%
Accommodation	37,400	9,900	36.0%
Food service & drinking places	63,300	7,300	13.0%
Other service	26,200	2,100	8.7%
Federal government	35,100	400	1.2%
State government	69,800	-500	-0.7%
Local government	18,300	-200	-1.1%

*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

May	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,039,362	829,917	1,118,421	943,437	808,136	824,403	95,925	21,781	294,018
HONOLULU	554,458	424,272	699,144	469,166	402,623	424,455	85,292	21,649	274,689
KAHULUI	265,870	243,702	229,284	255,237	243,570	220,016	10,633	132	9,268
KONA	116,036	107,706	106,089	116,036	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	99,815	52,079	79,966	99,815	52,079	79,966	0	0	0

June	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,060,674	980,170	1,166,887	962,385	959,533	888,904	98,289	20,637	277,983
HONOLULU	533,737	489,881	691,994	444,172	469,244	431,658	89,565	20,637	260,336
KAHULUI	292,637	278,205	265,892	283,913	278,205	257,829	8,724	0	8,063
KONA	124,970	124,659	114,157	124,970	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 June 27, 2022, subject to change

Scheduled Nonstop Seats to Hawai'i by Port Entry

July	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,185,846	1,175,933	1,237,099	1,051,611	1,149,908	935,384	134,235	26,025	301,715
HONOLULU	625,232	583,089	736,331	501,630	557,412	452,553	123,602	25,677	283,778
KAHULUI	312,745	345,407	281,408	302,112	345,059	273,254	10,633	348	8,154
KONA	133,559	140,019	119,878	133,559	140,019	110,095	0	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

August	Total			Domestic			International		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
STATE	1,177,841	1,126,296	1,193,649	996,679	1,092,775	881,533	181,162	33,521	312,116
HONOLULU	647,235	568,905	737,103	479,293	539,147	443,146	167,942	29,758	293,957
KAHULUI	295,961	308,898	257,291	285,328	305,135	248,915	10,633	3,763	8,376
KONA	126,045	138,197	108,231	123,458	138,197	98,448	2,587	0	9,783
HILO	5,549	5,549	4,804	5,549	5,549	4,804	0	0	0
LIHU'E	103,051	104,747	86,220	103,051	104,747	86,220	0	0	0

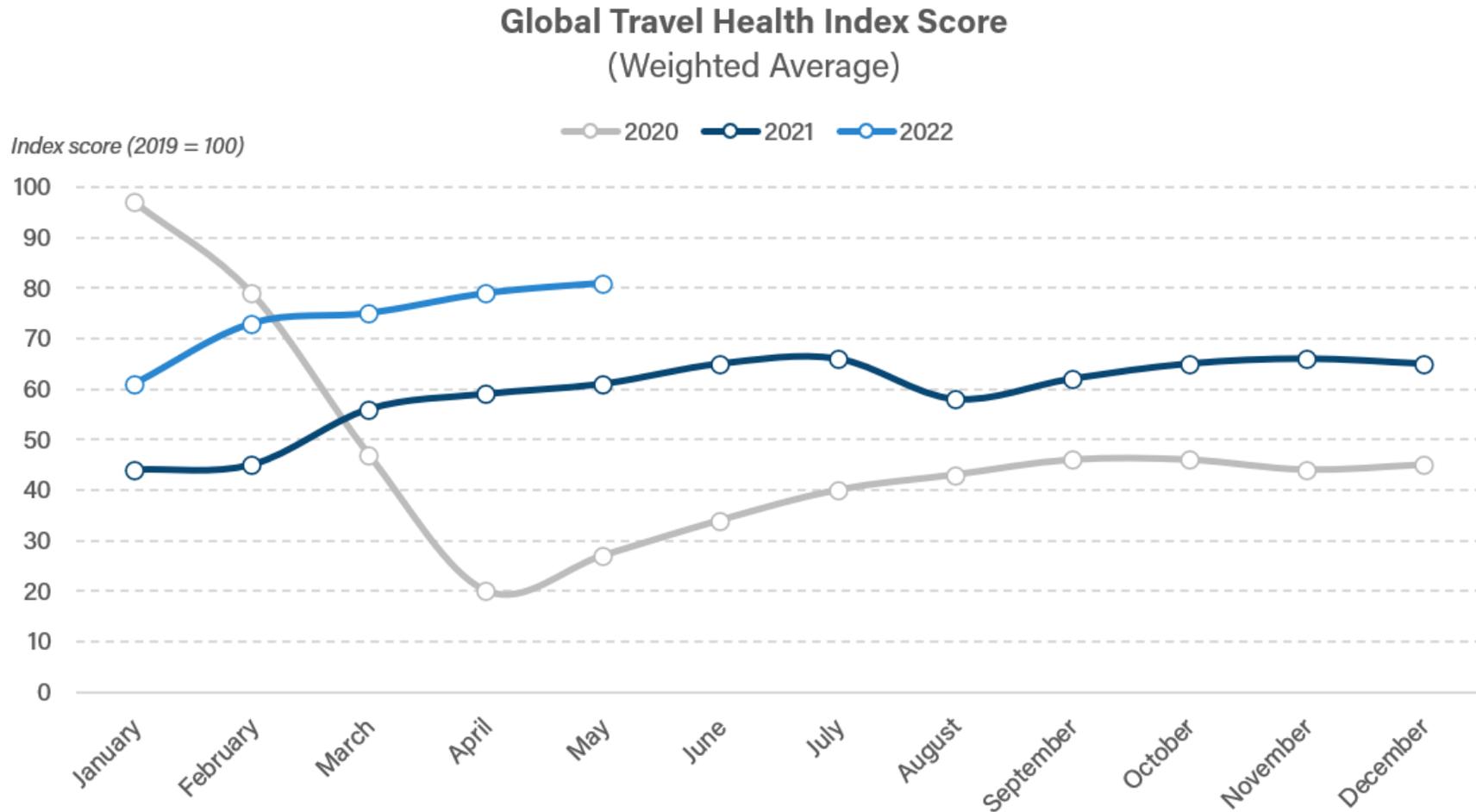
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of June 27, 2022, subject to change

Scheduled Nonstop Seats to Hawai'i From Japan

	June			July			August		
	2022	2021	2019	2022	2021	2019	2022	2021	2019
JAPAN	23,534	7,686	155,388	38,264	9,626	165,392	87,699	11,214	179,764
Nagoya			13,724			14,415	1,592	0	14,415
Osaka	1,390	1,112	33,374	1,709	1,390	30,573	10,848	1,112	34,720
Sapporo			3,614			3,614			4,448
Tokyo HND	7,678	2,960	24,060	14,677	3,764	24,862	27,426	4,010	24,862
Tokyo NRT	14,466	3,614	80,616	21,878	4,472	91,928	47,833	6,092	101,319

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of June 27, 2022, subject to change

Skift Travel Health Index May 2022 = 81



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

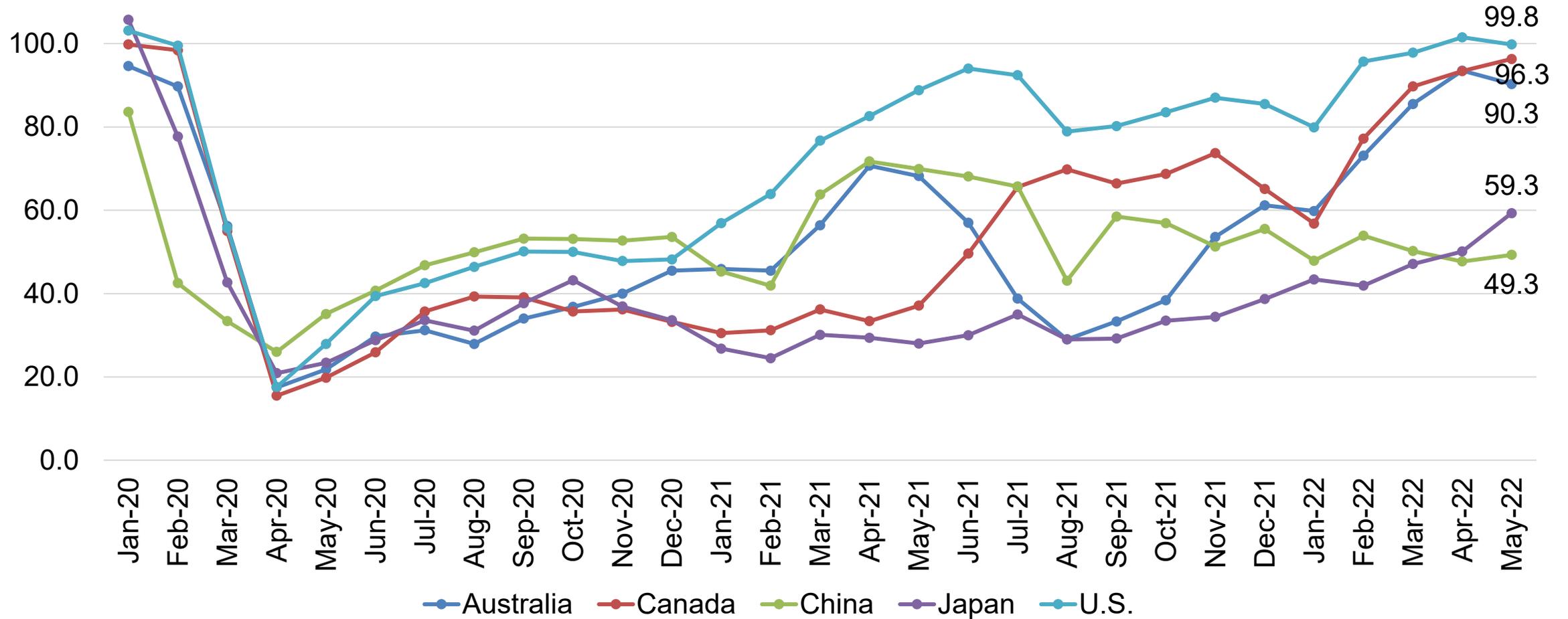


Source: Skift Research



Skift Travel Health Index by Country

Skift Travel Health Index for Selected Countries



Source: Skift Research

Pacific Asia Travel Association COVID-19 Update & Recovery Dashboard

DESTINATION	LOCKDOWN STATUS	INBOUND TRAVEL	OUTBOUND TRAVEL	VACCINATION RATE
AUSTRALIA	OPEN	OPEN	OPEN	21,659,860 (84.0%)
AZERBAIJAN	OPEN	OPEN	OPEN	4,853,088 (47.5%)
CANADA	OPEN	OPEN	OPEN	31,441,064 (82.6%)
CHINA	PARTIAL	PARTIAL	RESTRICTED	1,259,987,000 (87.2%)
FIJI	OPEN	OPEN	OPEN	634,914 (70.3%)
HAWAII	OPEN	OPEN	OPEN	1,107,414 (77.9%)
HONG KONG SAR	PARTIAL	PARTIAL	OPEN	6,417,766 (85.0%)
INDIA	OPEN	PARTIAL	PARTIAL	910,723,911 (65.4%)
INDONESIA	PARTIAL	OPEN	OPEN	168,251,795 (60.9%)
JAPAN	PARTIAL	PARTIAL	PARTIAL	102,316,683 (81.2%)
KOREA (ROK)	OPEN	OPEN	OPEN	44,621,613 (87.0%)
MALAYSIA	OPEN	OPEN	OPEN	27,259,374 (83.2%)
MALDIVES	OPEN	OPEN	OPEN	384,347 (70.7%)
MYANMAR	OPEN	OPEN	OPEN	27,027,467 (49.3%)
NEPAL	PARTIAL	PARTIAL	PARTIAL	20,235,863 (68.2%)
NEW ZEALAND	OPEN	OPEN	OPEN	4,111,691 (80.2%)
SINGAPORE	OPEN	OPEN	OPEN	4,995,121 (91.6%)
SRI LANKA	OPEN	OPEN	OPEN	14,523,208 (67.6%)
THAILAND	OPEN	OPEN	OPEN	52,842,017 (75.5%)
USA	OPEN	OPEN	OPEN	222,123,223 (66.9%)
VIETNAM	OPEN	OPEN	OPEN	80,592,402 (82.1%)

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 June 29, 2022

- Impact Summary
- Travel Indicators
- Int'l Arrivals to the U.S.
- Economic Conditions
- Employment
- Workforce
- Travel Sentiment**
- Predictive DMO Indicators
- Predictive Industry Indicators
- Economic Forecast
- Domestic Travel Forecast
- International Travel Forecast
- U.S. Hotel Forecast
- Data Sources & Partners

U.S. Resident Vacation Intentions

% of U.S. residents intending to travel in the next 6-months



Source: The Conference Board

U.S. Business Travel Sentiment

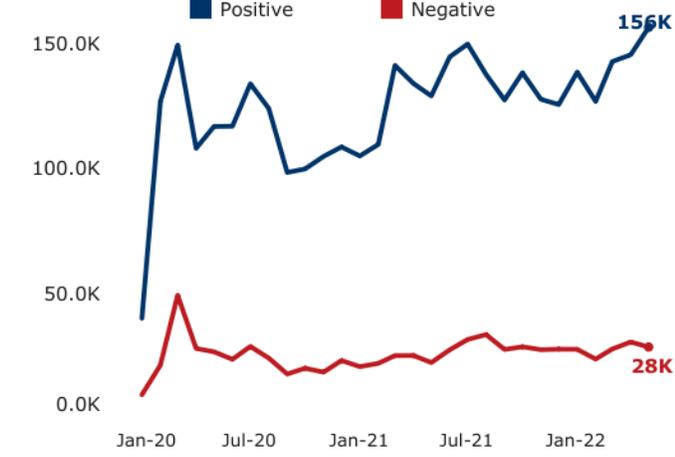
% of US companies that plan on being in the travel game the nex..



*survey suspended for November and December, 2021
Source: GBTA Business Travel Survey

Social Travel Sentiment by Month

Positive vs. Negative mentions of travel Jan-20 to May-22



Source: MMGY Global

Consumer Travel Sentiment

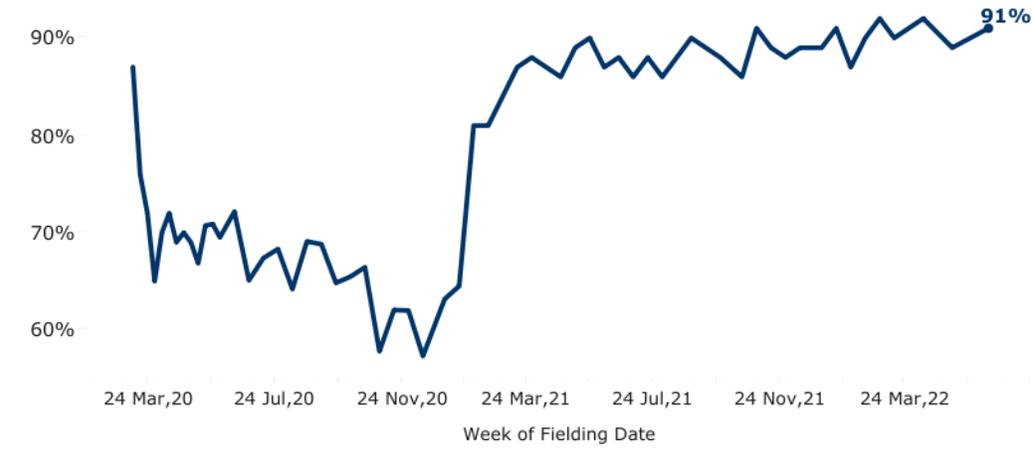
% of travelers that are ready to travel



Source: Destination Analysts

Consumer Travel Sentiment

Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

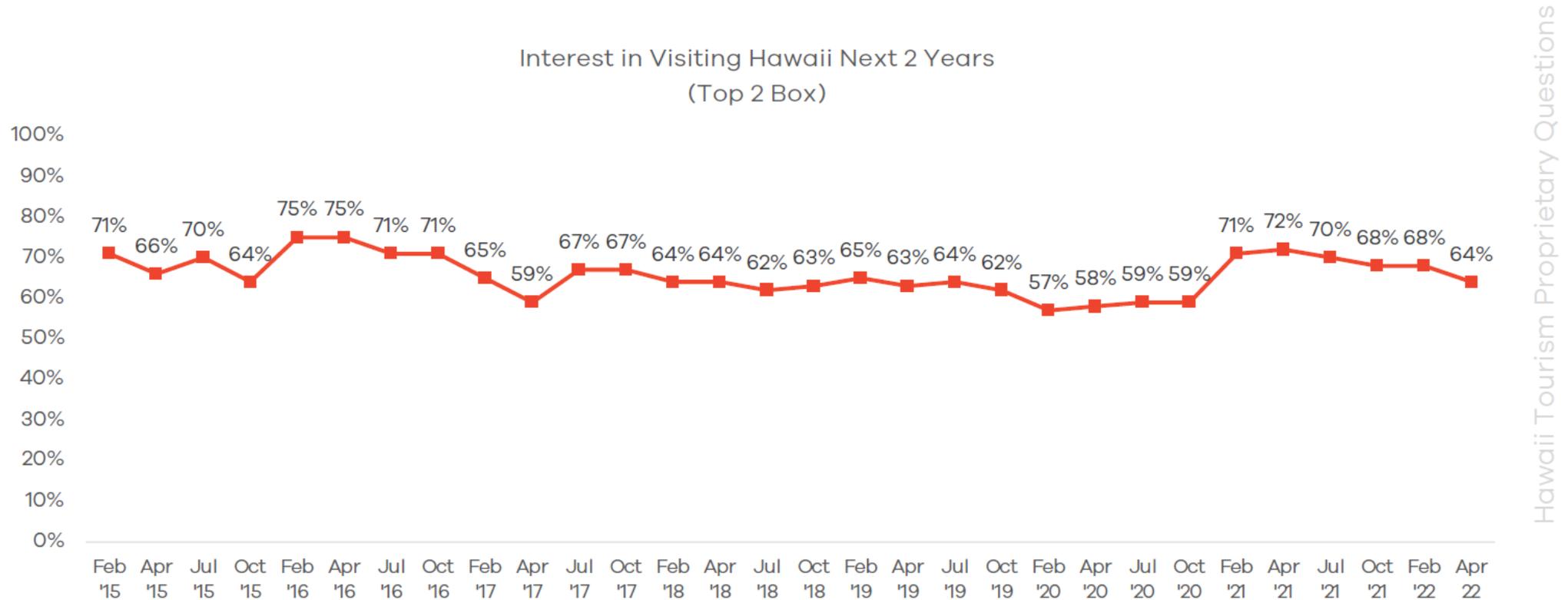
MMGY Portrait of American Travelers



<https://www.hawaiitourismauthority.org/research/other-research/>

MMGY Portrait of American Travelers

Interest in Visiting Hawaii is Down Significantly from April '21.



Base: Air Travelers (n=1,432)
Source: MMGY Global's 2022 Portrait of American Travelers® "Summer Edition"

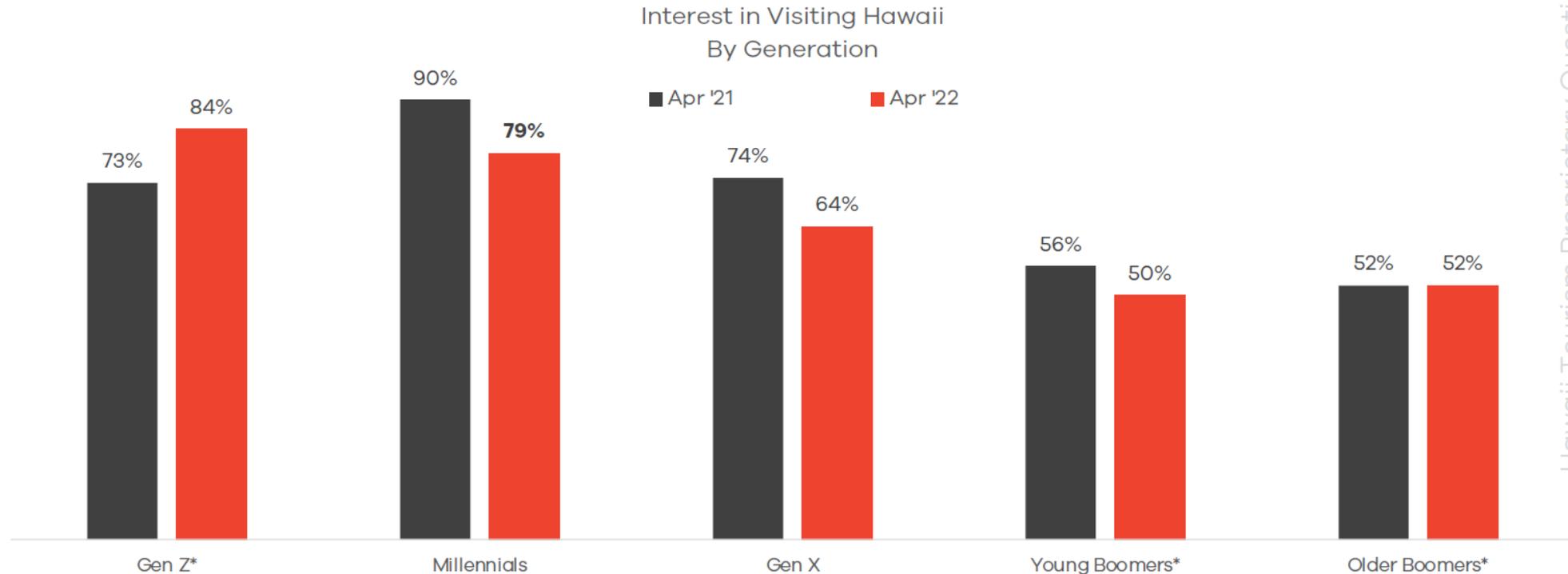


<https://www.hawaiitourismauthority.org/research/other-research/>



MMGY Portrait of American Travelers

Interest in Visiting Hawaii Decreased Among Millennials from April '21.



* Small sample size – Interpret with caution.

Data in bold indicates a significant difference from April 2021.

Base: Air Travelers (n=1,432)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

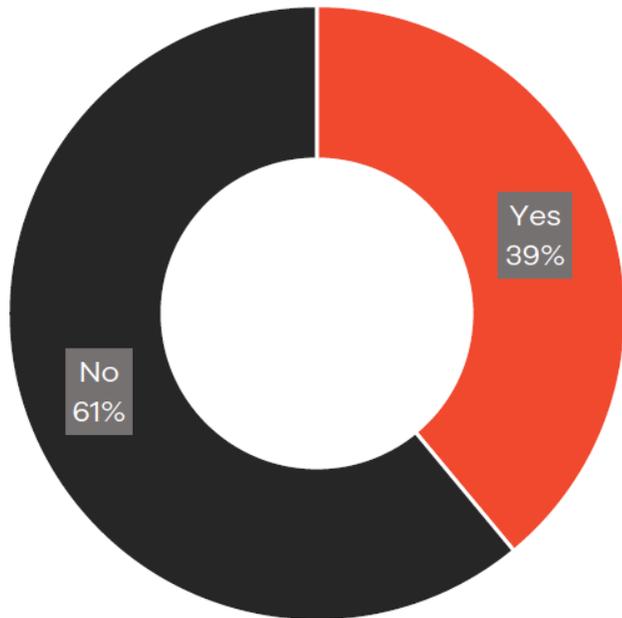
MMGY Travel Intelligence

<https://www.hawaiitourismauthority.org/research/other-research/>

MMGY Portrait of American Travelers

The Cost to Visit Hawaii is the Top Deterrent to Visit, Increasing Slightly from Last Year and Now Higher Than Concerns of COVID-19.

Considered Visiting Hawaii But Changed Mind



Reasons For Not Visiting Hawaii – Among Those Who Changed Their Mind	Apr '21	Apr '22
Price of airfare	31%	35%
Price of a vacation package	26%	30%
Hawaii's COVID-19 travel restrictions	NA	27%
Price of the hotel	27%	25%
Better value at another destination	23%	23%
Concerns about COVID-19 variants	NA	21%
The flight to Hawaii is too long	22%	20%
Accommodations were not available	11%	12%
Already been and want to try another destination	18%	11%
Not enough time to travel to Hawaii	13%	11%
Not sure which island(s) in Hawaii to visit	13%	11%
Hawaii is too crowded	17%	10%
Hurricanes and tropical storms hitting Hawaii	13%	9%
Local people are not friendly	12%	9%
Hawaii is not unique enough	11%	8%
Not enough activities in Hawaii	7%	8%
Hawaii is not exotic enough	9%	6%

Data in bold indicates a significant difference from April 2021.

Base: Air Travelers (n=1,432) & Travelers Who Changed Their Mind (n=554)
 Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

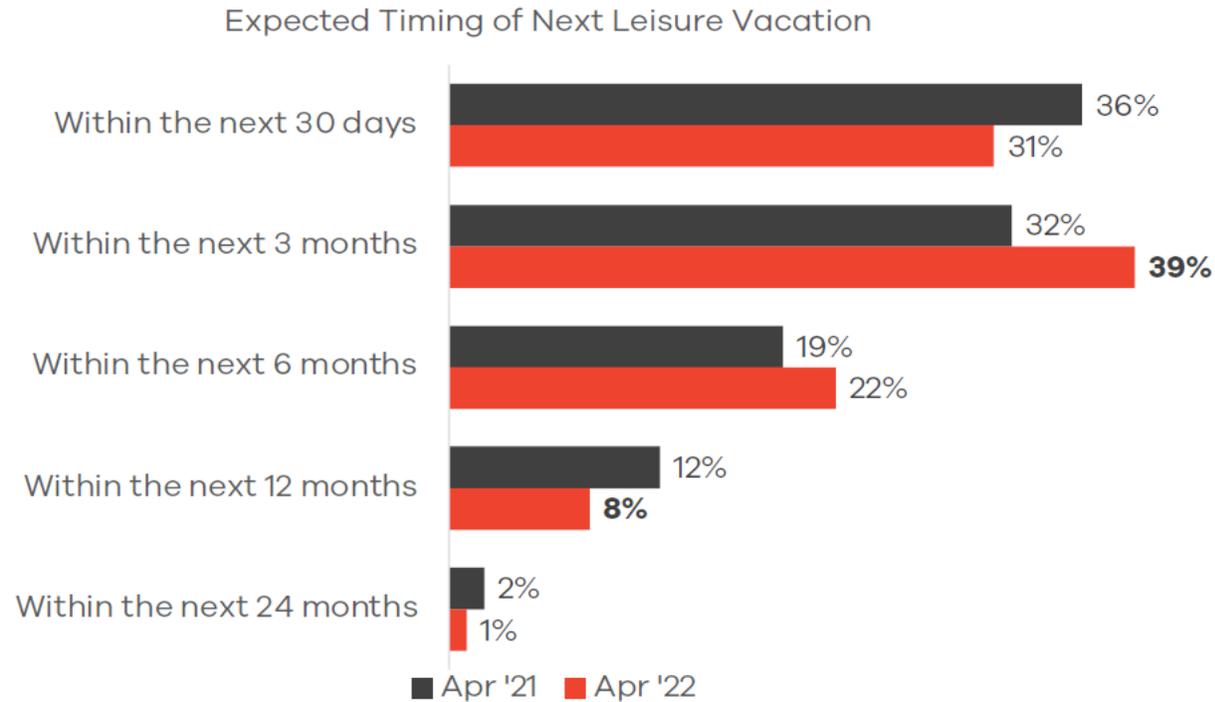


Hawaii Tourism Proprietary Questions

<https://www.hawaiiauthority.org/research/other-research/>

MMGY Portrait of American Travelers

Travel Intentions in the Next 3 Months Are Up From April '21.



Traveler Intentions: Over Time

Data in bold indicates a significant difference from February 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"

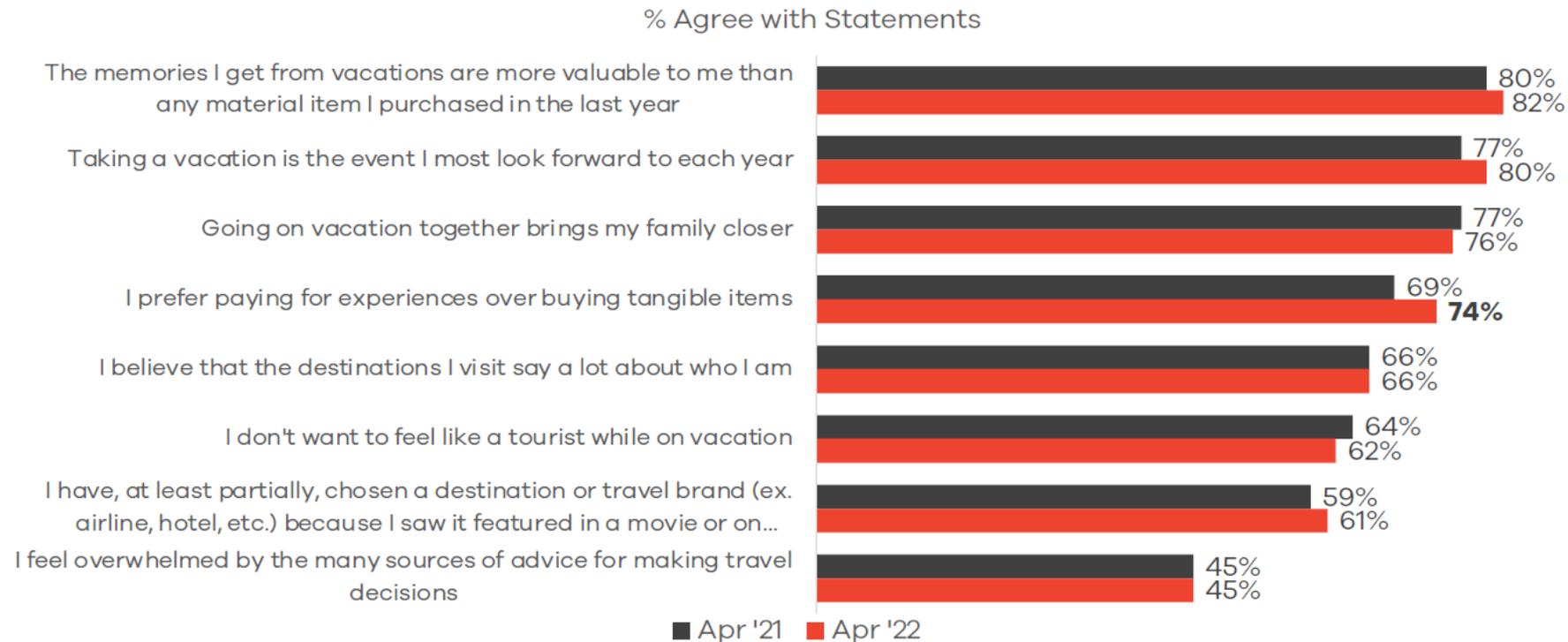


<https://www.hawaiiauthority.org/research/other-research/>



MMGY Portrait of American Travelers

Likely Hawaii Visitors Are Looking For Experiences and To Make Memories When on Vacation



Traveler Perspectives

Data in bold indicates a significant difference from April 2021.

Base: Likely to Visit Hawaii (n=646)

Source: MMGY Global's 2022 *Portrait of American Travelers*® "Summer Edition"



<https://www.hawaiiauthority.org/research/other-research/>

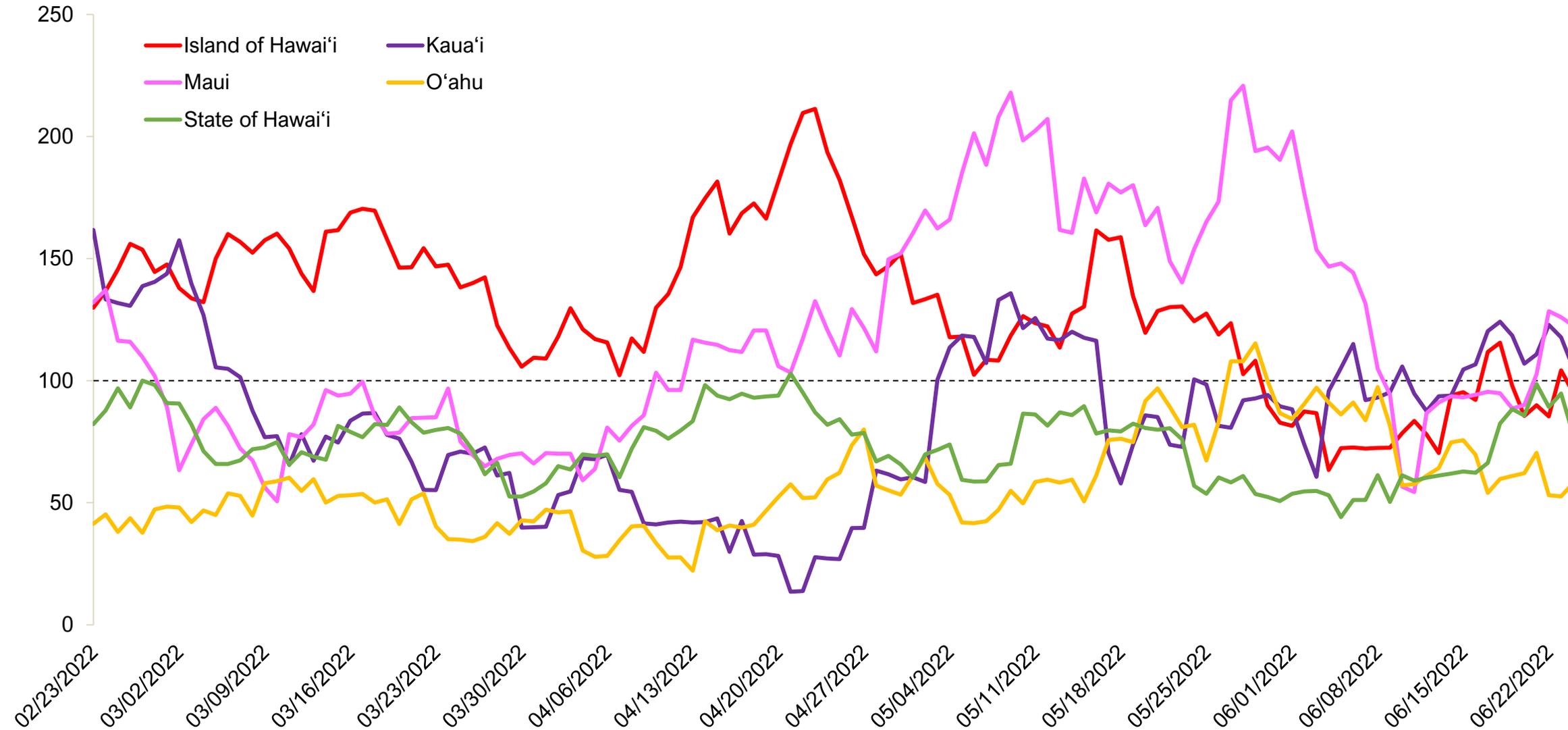


YouGov Destination Index Trends

June 27, 2022



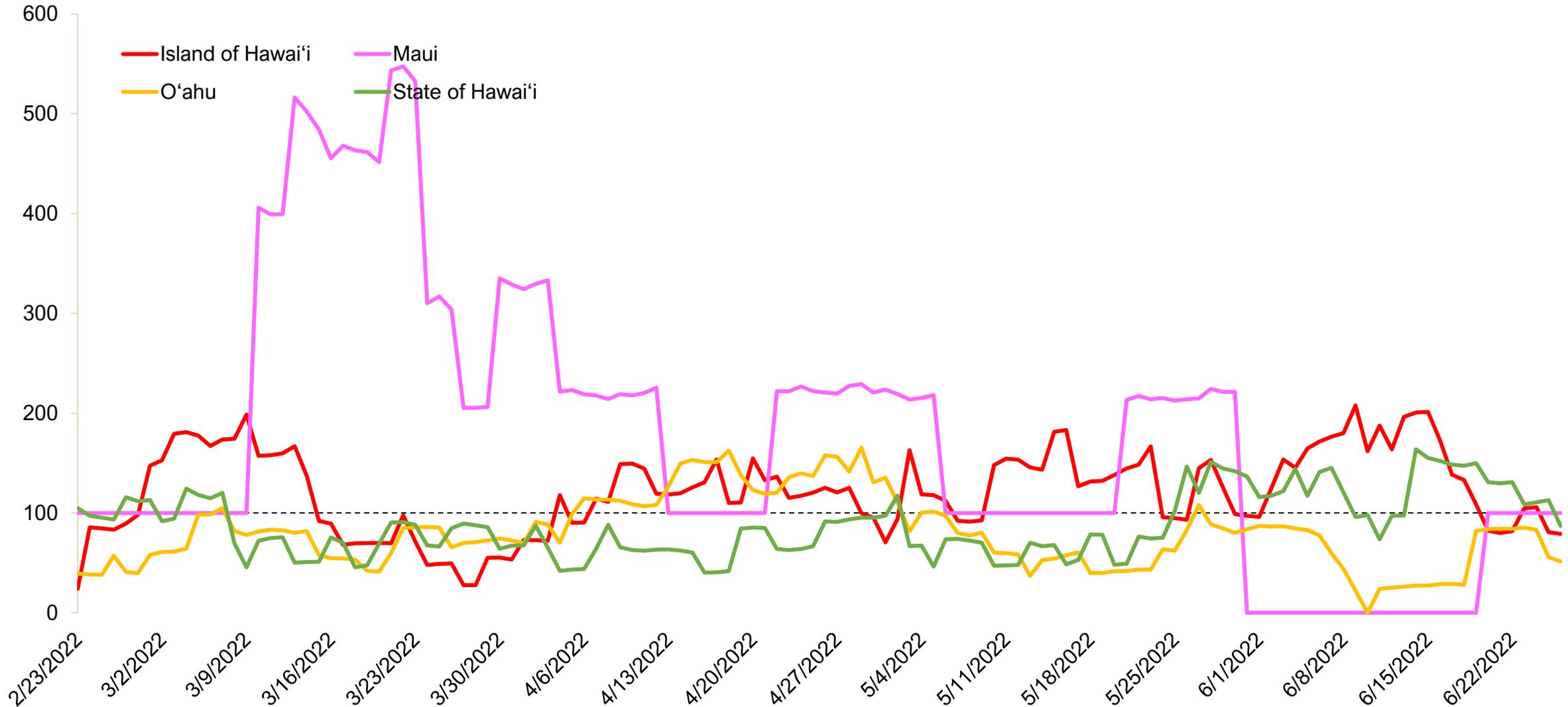
Index of U.S. Purchase Intent (% Yes) Two-Week Moving Average



Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of June 27, 2022

Index of Japan Purchase Intent (% Yes) Two-Week Moving Average



Question: (Net) Of the destinations considered, which are you most likely to visit?

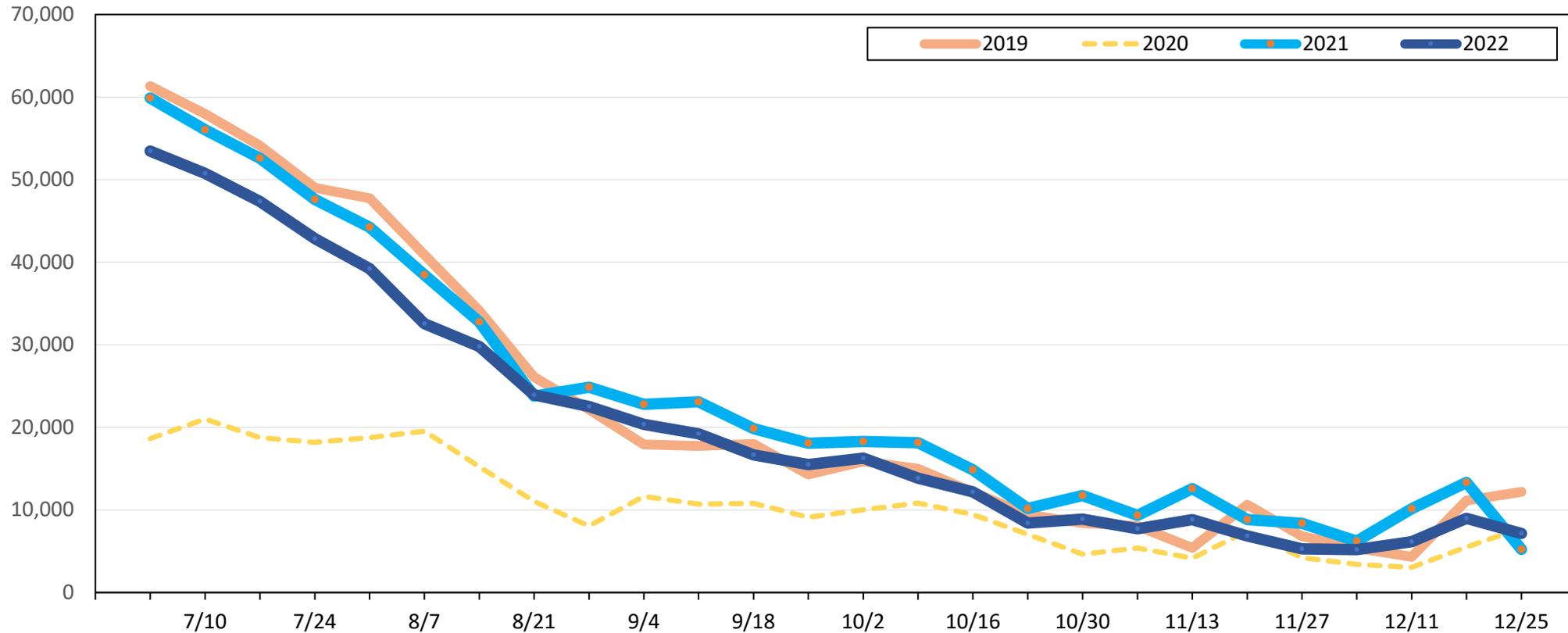
**Kaua'i is not included due to low response volume*

Source: YouGov data as of June 27, 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 June 25, 2022 U.S.

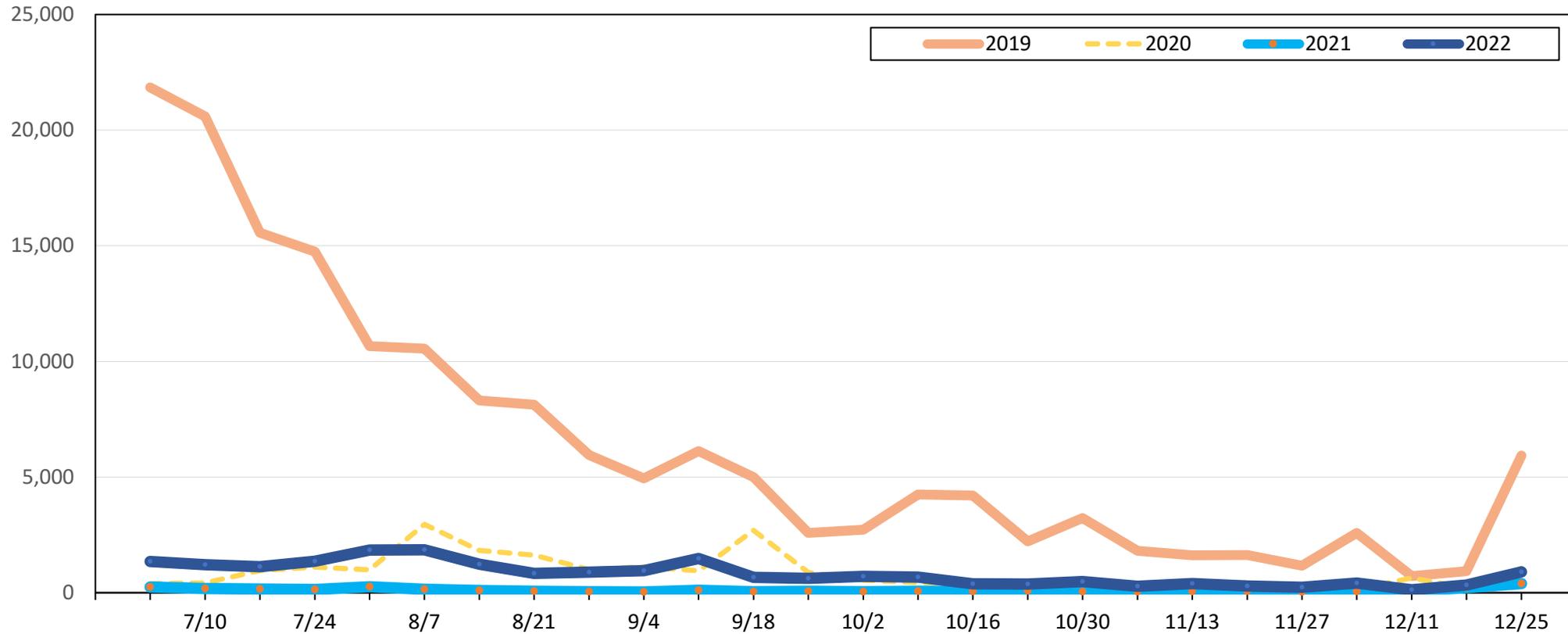


Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of June 25, 2022
lanan

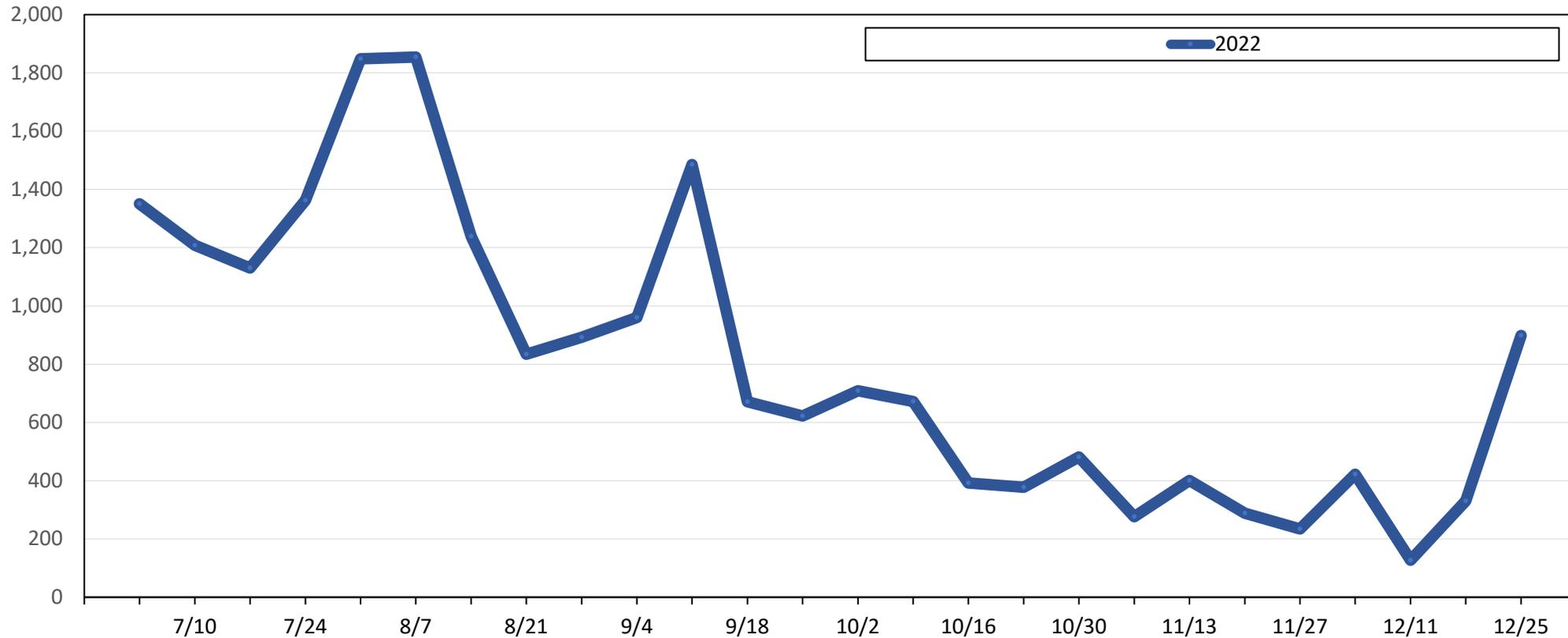


Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of June 25, 2022
lanan

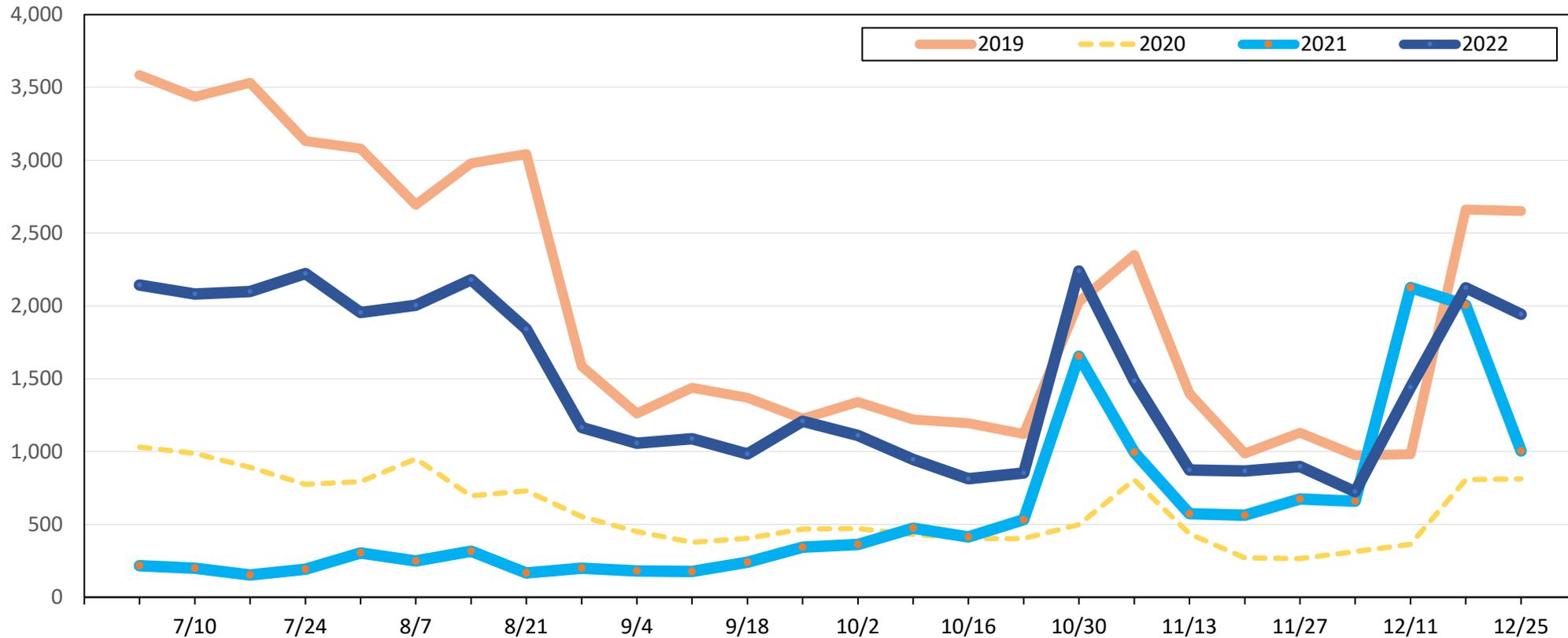


Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of June 25, 2022
Canada

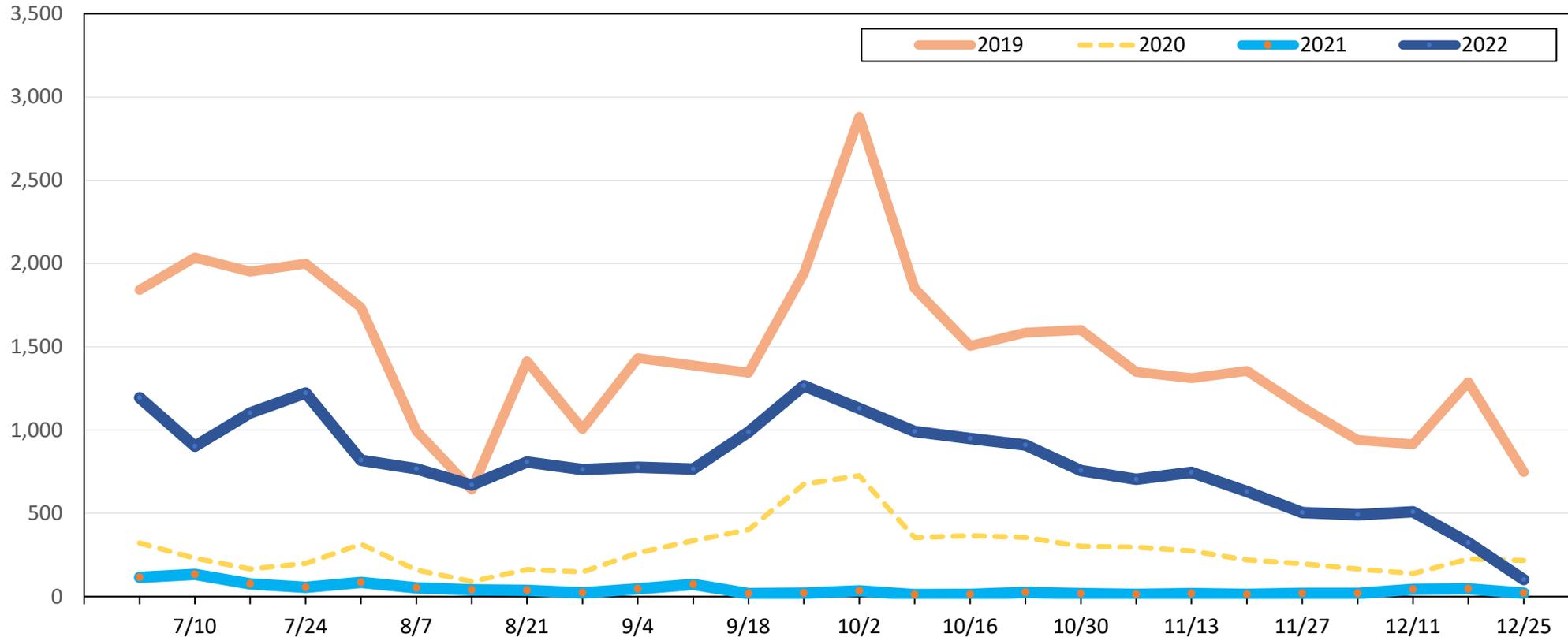


Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of June 25, 2022 Korea

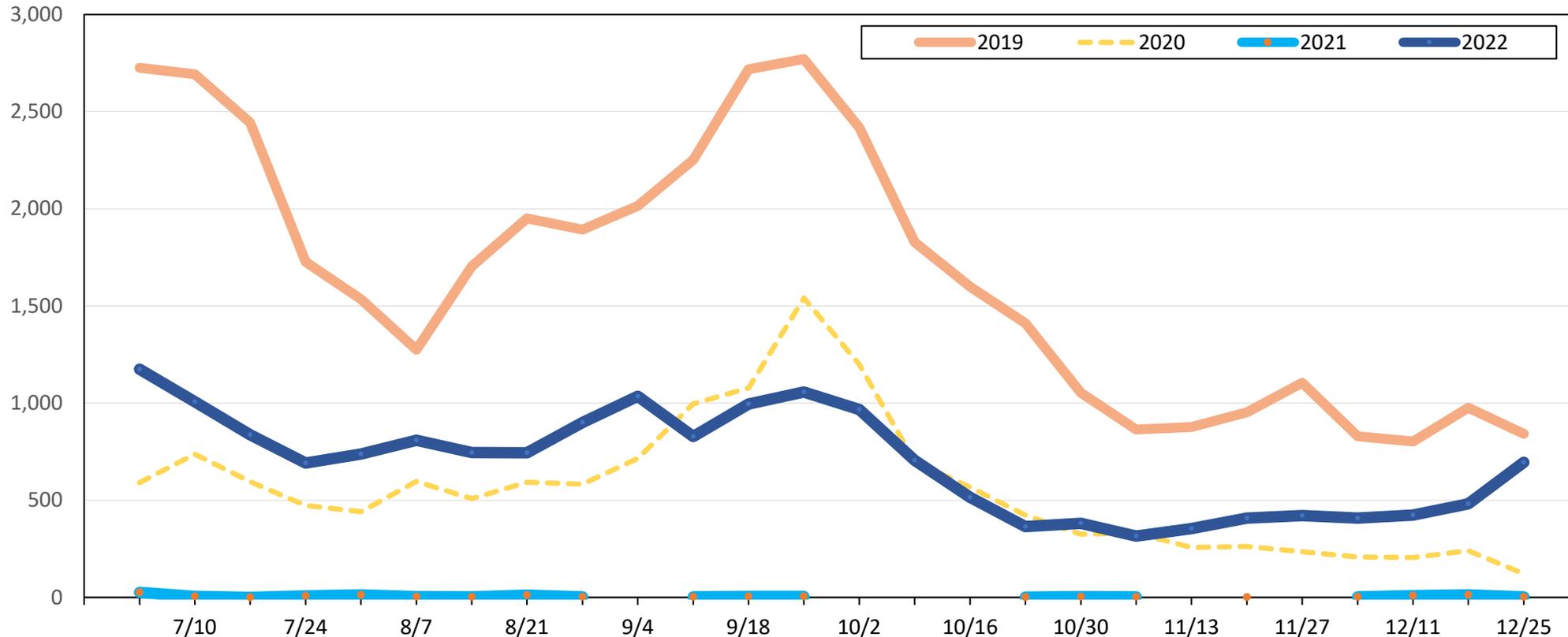


Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of June 25, 2022
Australia



Source: Global Agency Pro, as of June 25, 2022

Source: Global Agency Pro

Visitor Satisfaction & Activity (VSAT) Q1 2022



VISITOR SATISFACTION STUDY Q1 2022

State of Hawai'i
Department of Business, Economic Development & Tourism

Prepared By:
[ANTHOLOGY®]
RESEARCH
www.AnthologyResearch.com

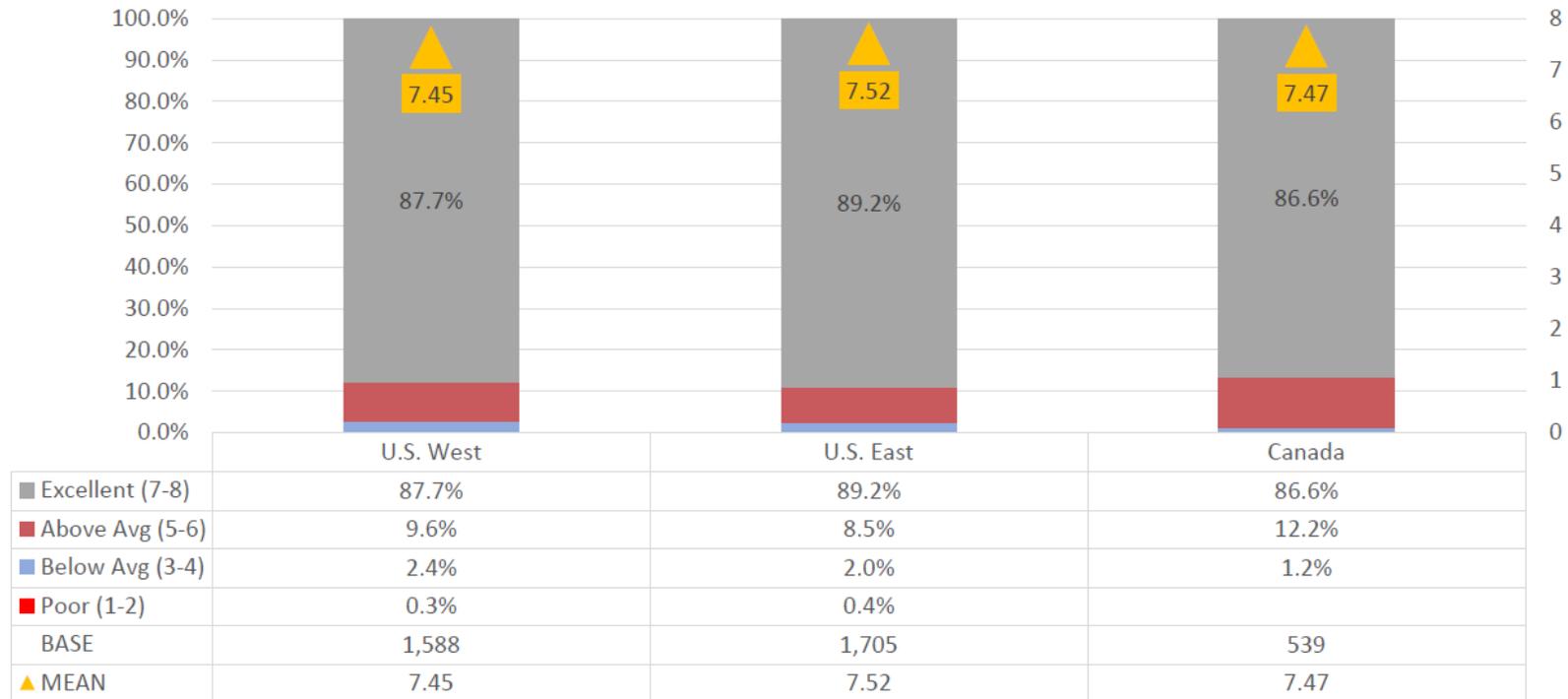
<https://www.hawaiiauthority.org/research/visitor-satisfaction-and-activity/>



Visitor Satisfaction & Activity (VSAT) Q1 2022

Satisfaction - State of Hawai'i by Visitor Market

8-pt Rating Scale
8=Excellent / 1=Poor



Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

[ANTHOLOGY]
RESEARCH

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

<https://www.hawaiiauthority.org/research/visitor-satisfaction-and-activity/>

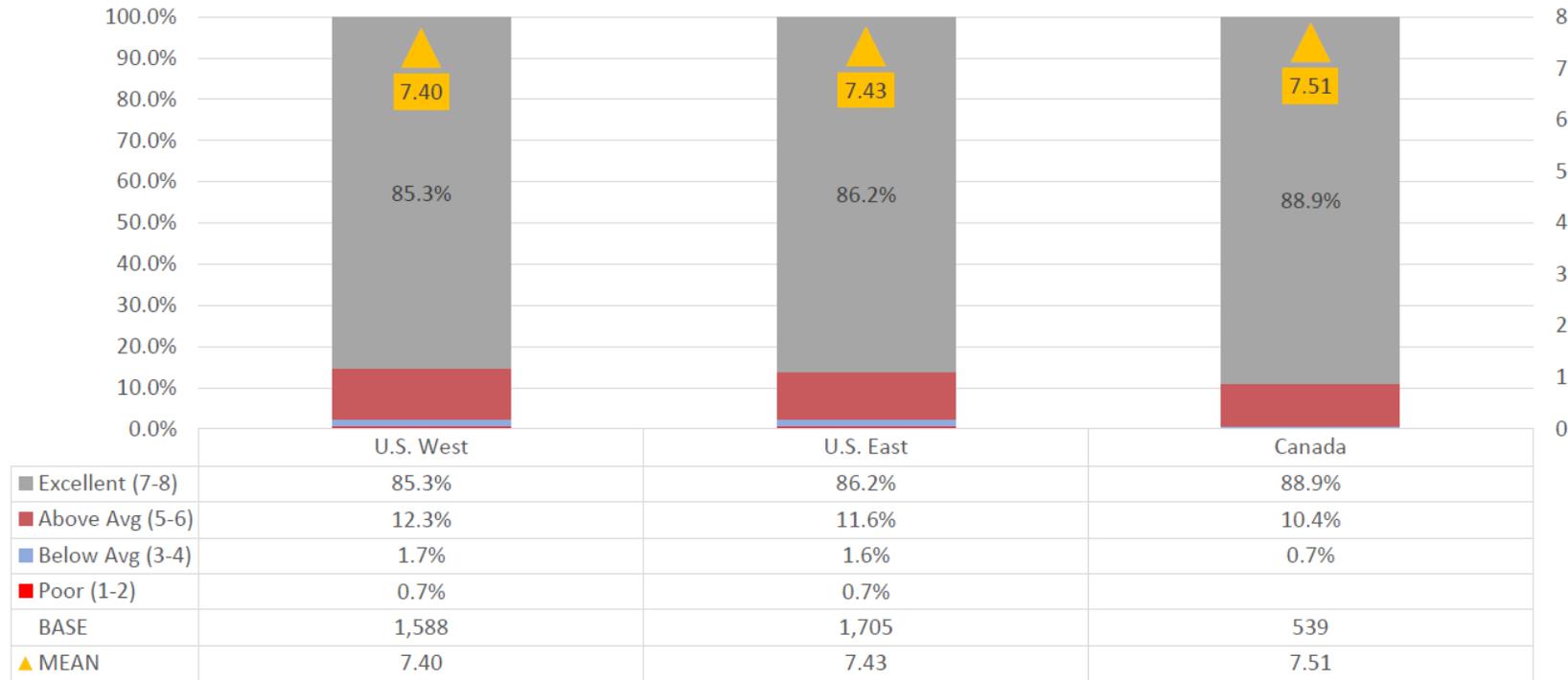
DBEDT
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

HAWAII TOURISM
AUTHORITY

Visitor Satisfaction & Activity (VSAT) Q1 2022

SAFE AND SECURE DESTINATION

8-pt Rating Scale
8=Excellent/ 1=Poor



Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

[ANTHOLOGY]
RESEARCH



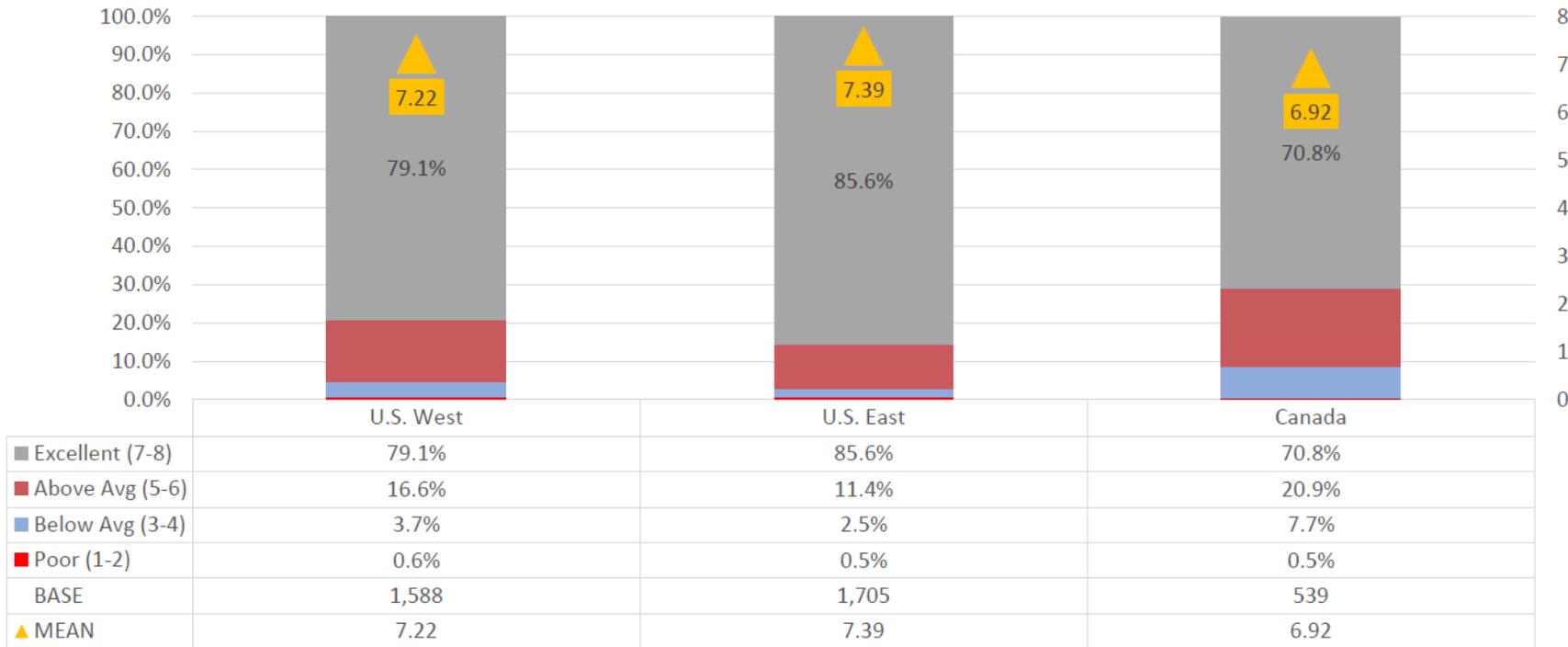
<https://www.hawaiiauthority.org/research/visitor-satisfaction-and-activity/>



Visitor Satisfaction & Activity (VSAT) Q1 2022

ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

8-pt Rating Scale
8=Excellent/ 1=Poor



Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on___?

[ANTHOLOGY]
RESEARCH

DBEDT
DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

<https://www.hawaiiauthority.org/research/visitor-satisfaction-and-activity/>

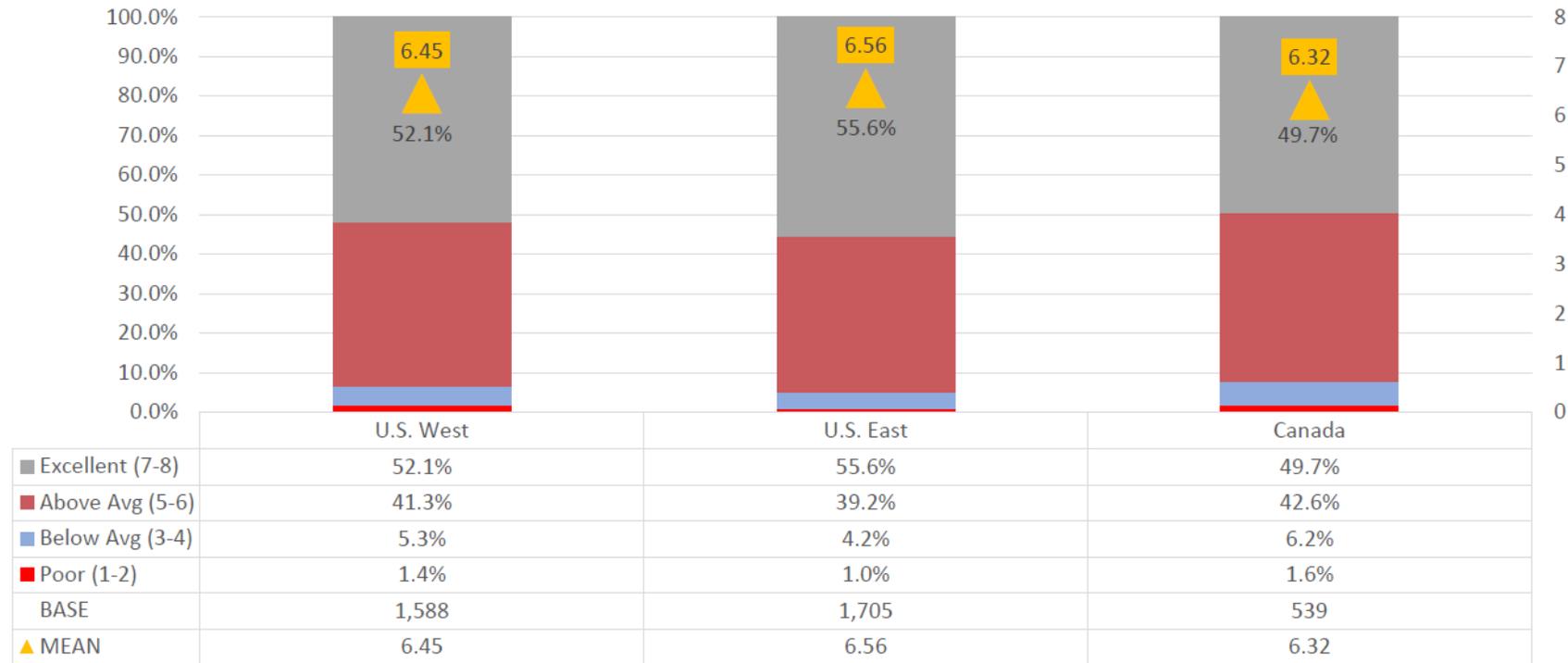
DBEDT
STATE OF HAWAII • DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

HAWAII TOURISM
AUTHORITY

Visitor Satisfaction & Activity (VSAT) Q1 2022

VOLUNTEER/ GIVE-BACK OPPORTUNITIES

8-pt Rating Scale
8=Excellent/ 1=Poor



Q. Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on ___?

[ANTHOLOGY]
RESEARCH

DBEDT
DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

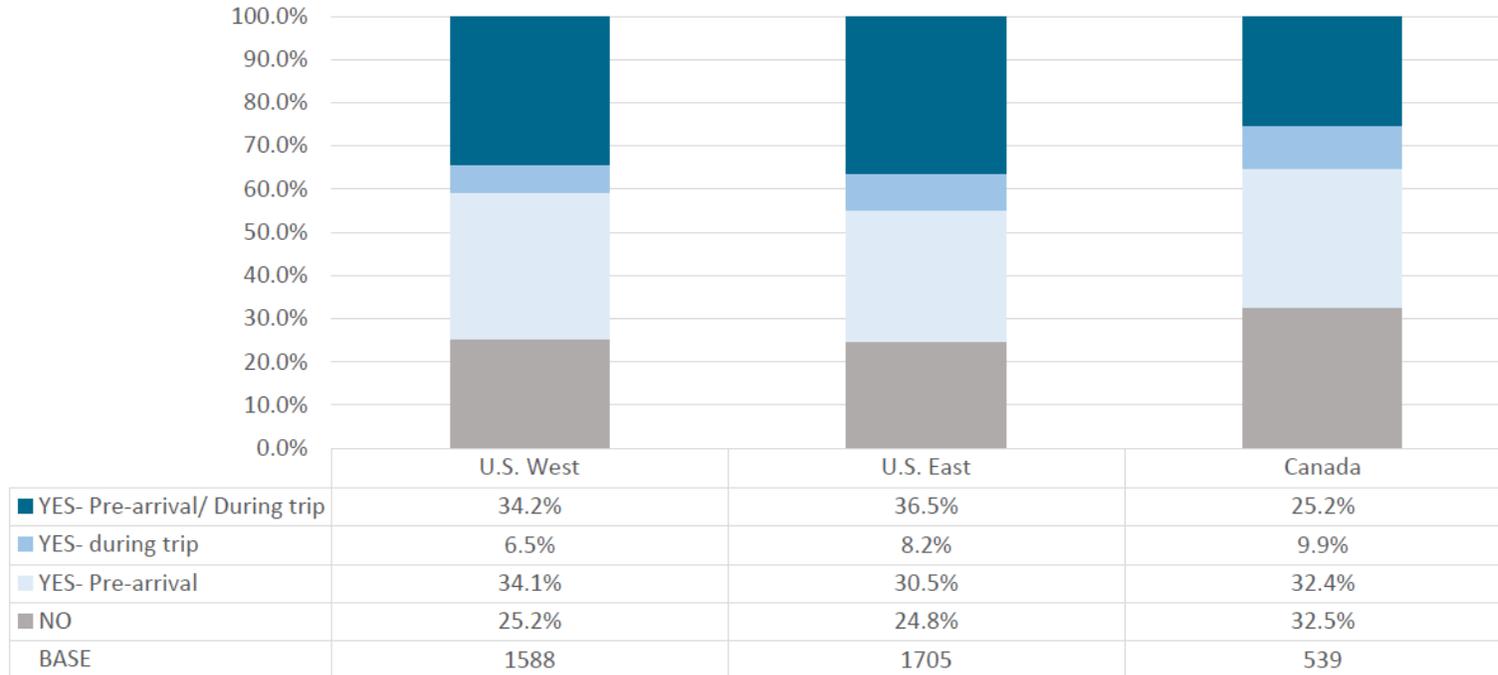
<https://www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

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

HAWAII TOURISM
AUTHORITY

Visitor Satisfaction & Activity (VSAT) Q1 2022

SAFE AND RESPONSIBLE TRAVEL



Q. Either before visiting or while you were in Hawai'i, do you recall seeing or hearing anything about any of the following topics?

[ANTHOLOGY]
RESEARCH

DBEDT

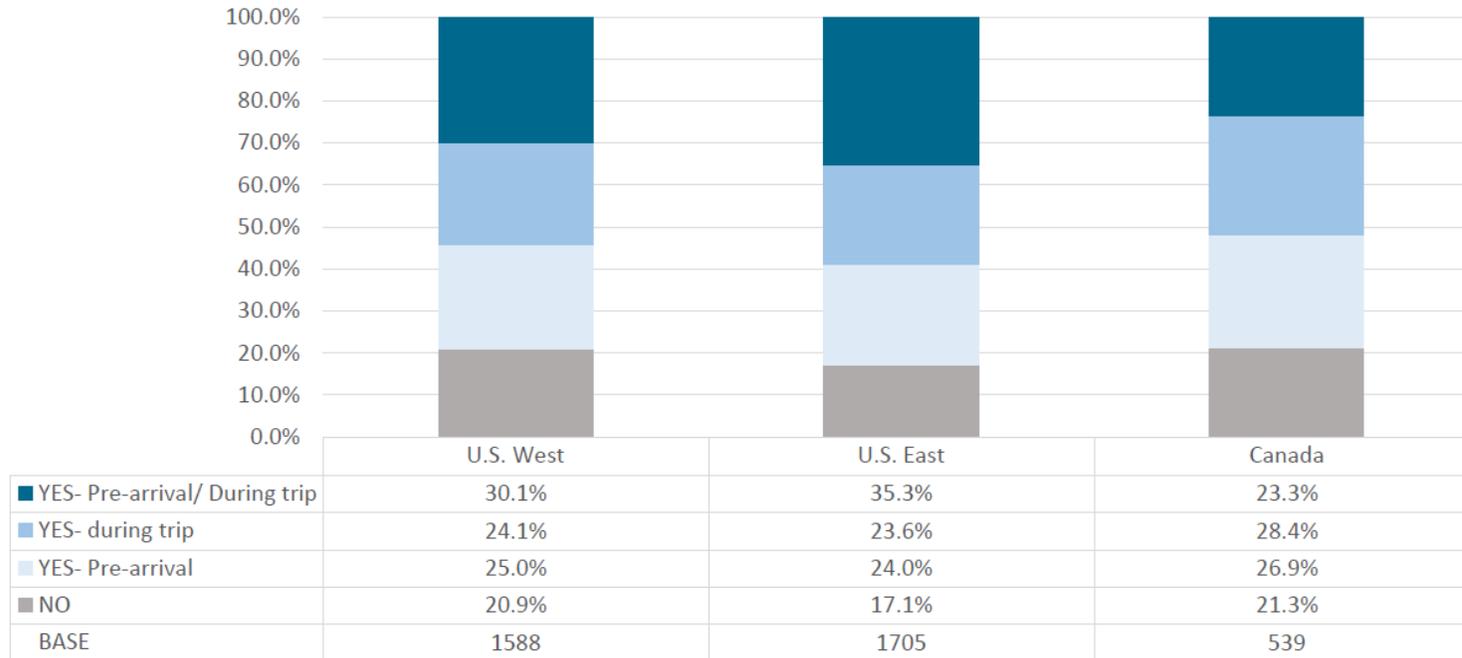
<https://www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

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

HAWAII TOURISM
AUTHORITY

Visitor Satisfaction & Activity (VSAT) Q1 2022

CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE, AND ENVIRONMENT



Q. Either before visiting or while you were in Hawai'i, do you recall seeing or hearing anything about any of the following topics?

[ANTHOLOGY]
RESEARCH

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

<https://www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

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

HAWAII TOURISM
AUTHORITY

MAHALO!

