

2022 Tourism Conference

Global Outlook & Tourism Update

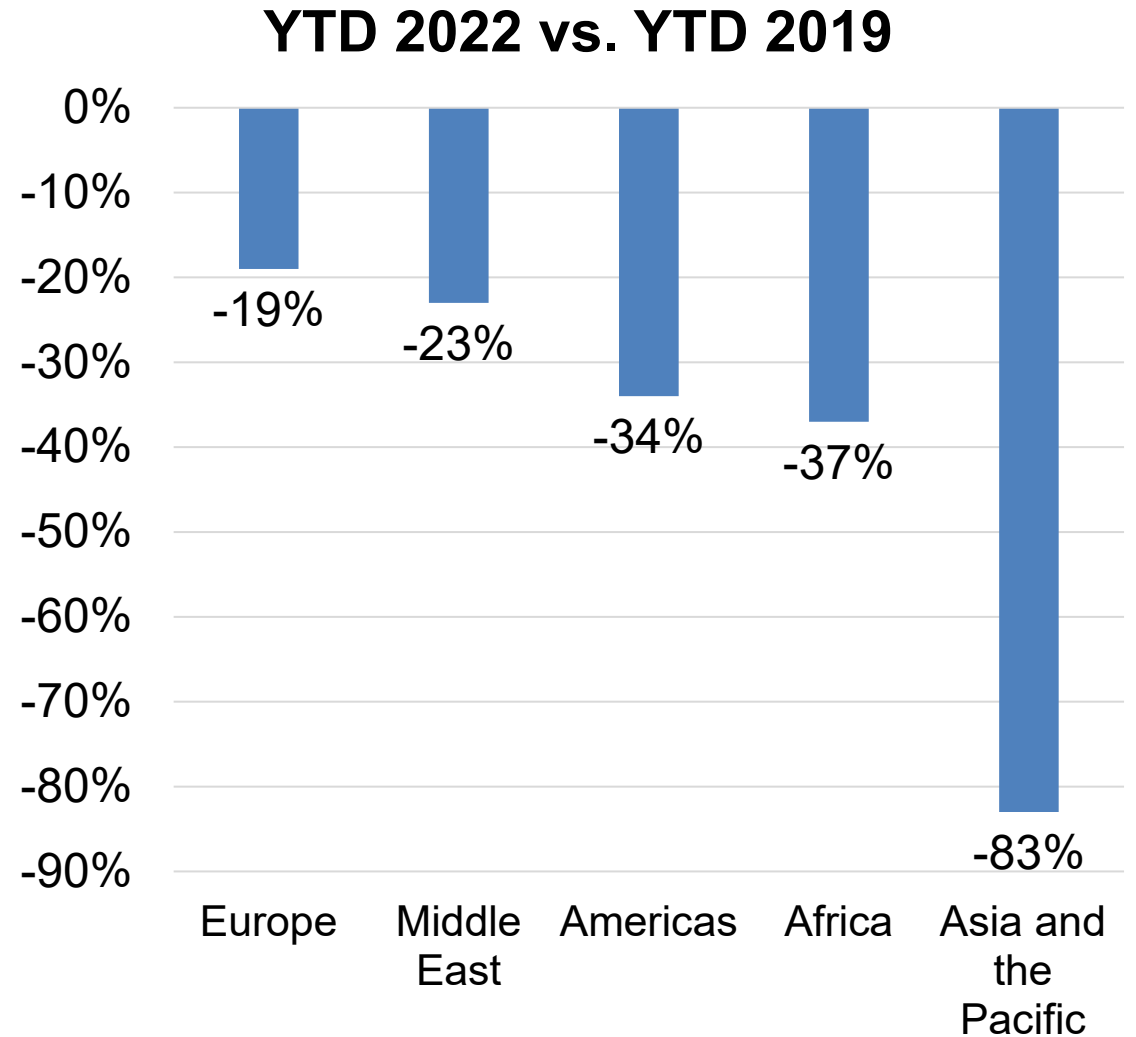
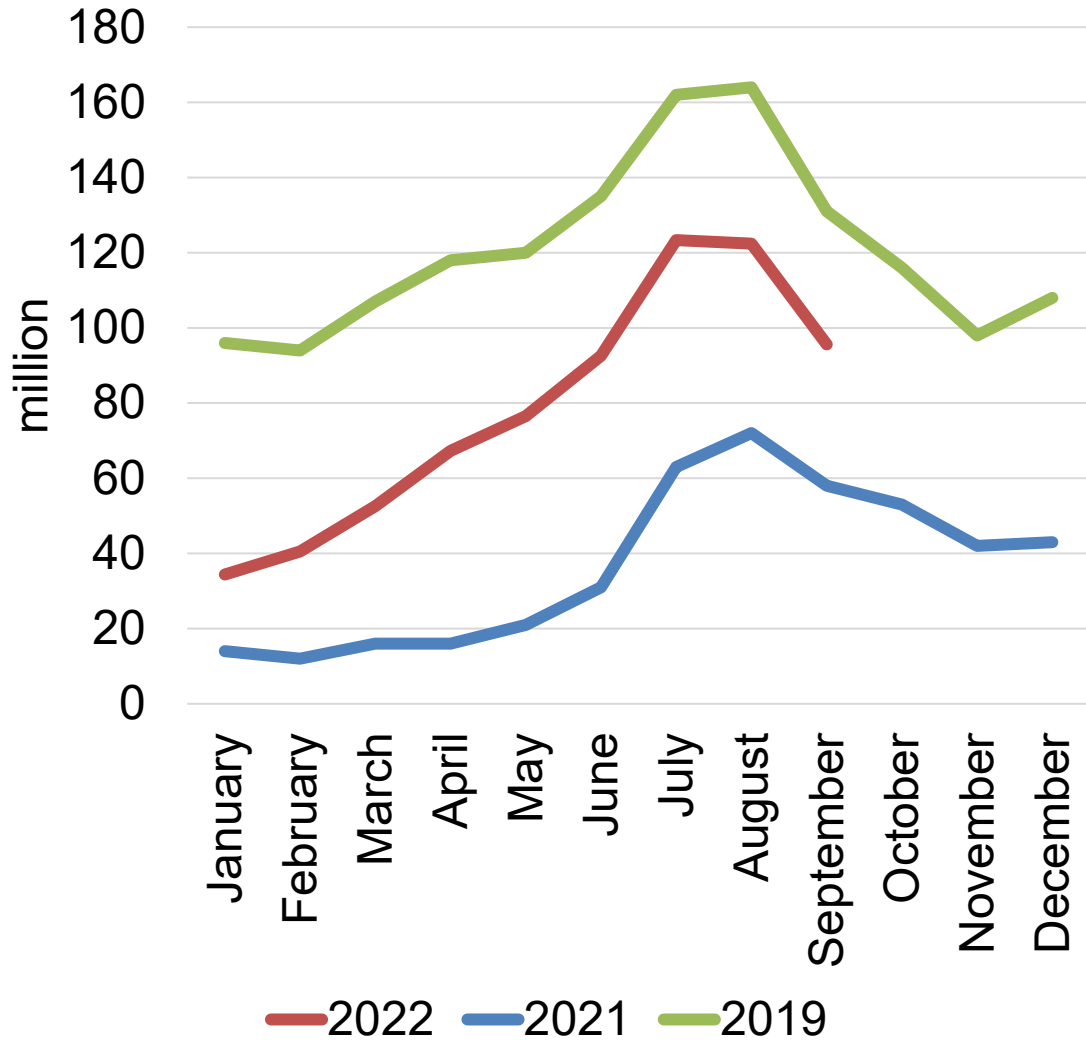
Dec. 9, 2022

Jennifer Chun

Director of Tourism Research

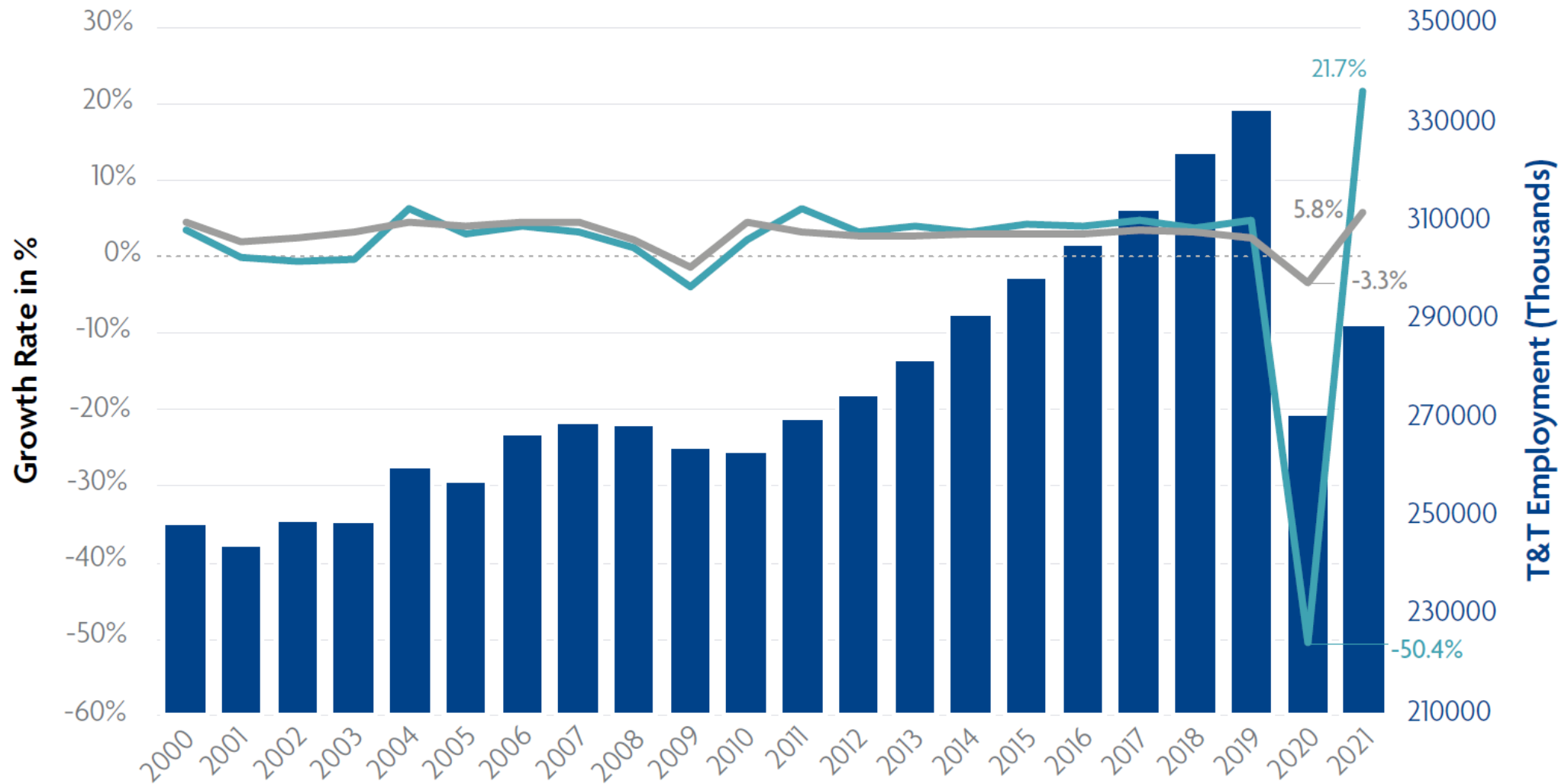


UNWTO International Tourism Arrivals



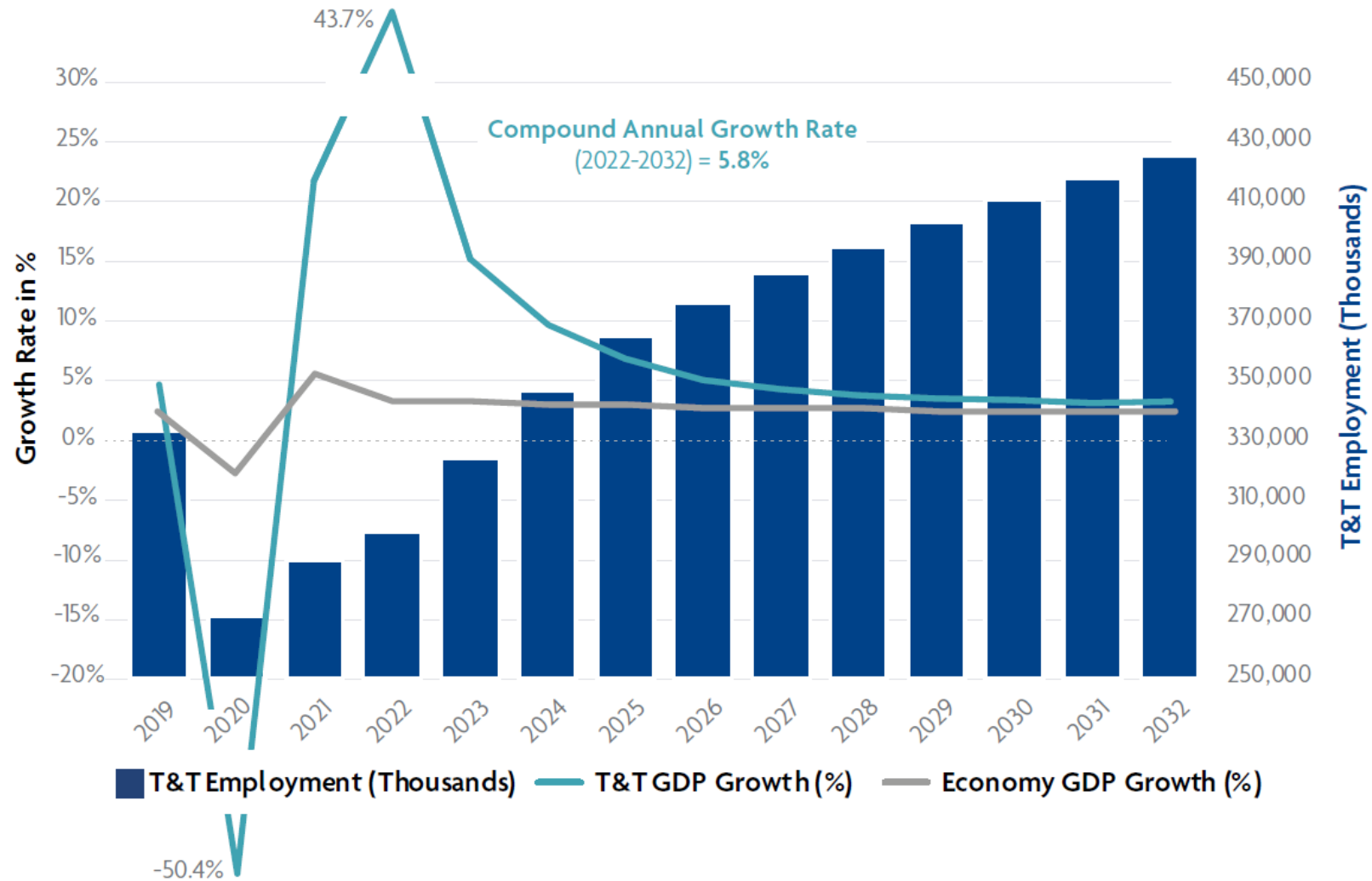
Source: UN World Tourism Organization

WTTC Economic Impact Timeline 2000 - 2021



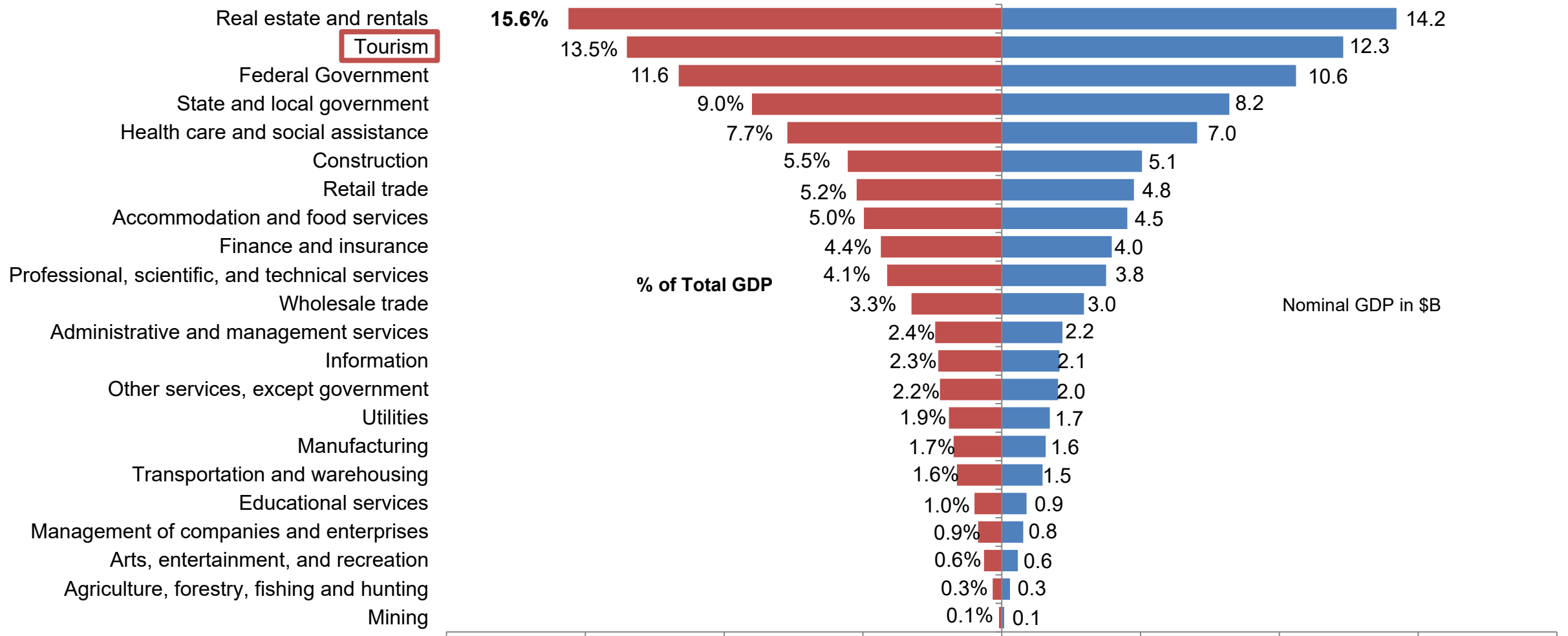
Source: World Travel & Tourism Council

WTTC Travel & Tourism Forecast 2022 - 2032



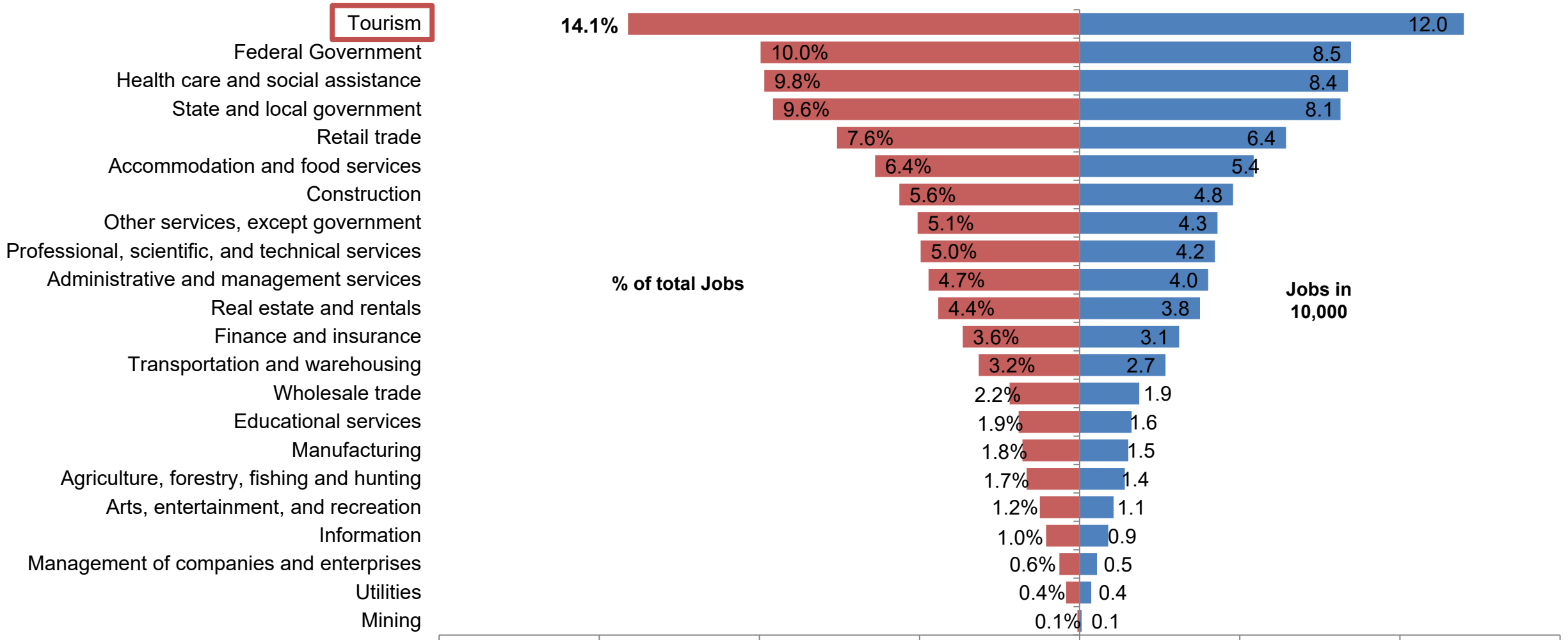
Source: World Travel & Tourism Council

Hawaii GDP by Industry: 2021 (in current dollars)



Source: DBEDT *GDP generated in the other sectors by tourism have been subtracted from each industry's measure.*

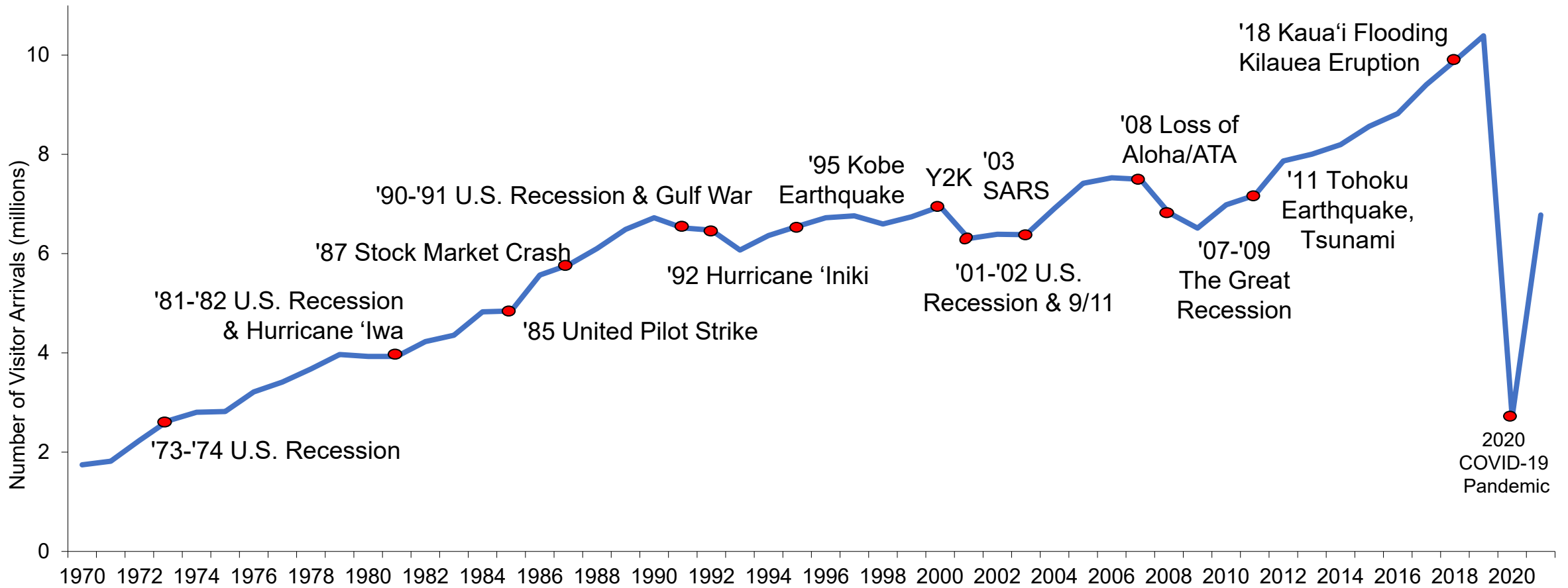
Hawaii Jobs by Industry: 2021 (Includes payroll jobs and proprietors)



Source: DBEDT *Jobs generated in the other sectors by tourism have been subtracted from each industry's measure*

Historical Visitor Arrivals

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



2021 data are preliminary

Hawai'i Tourism at a Glance

	2013	2014	2015	2016	2017R	2018	2019	2020	2021	YTD 2022 ¹
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$17.72B (+1.2%)	\$4.63B ² (-73.9%)	\$13.1B (+180.6%)	\$15.9B
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8)	\$2.07B (+1.2%)	\$540.6M ³ (-73.9%)	\$1.53B (+180.6%)	\$1.84B
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	216K (+0.6%)	56.4K ³ (-73.9%)	160K (+180.6%)	
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	10.39M (+5.0%)	2.71M (-73.9%)	6.78M (+150.3%)	7.64M
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	13.6M (+2.9%)	5.32M (-60.9%)	10.74M (+101.8%)	10.5M

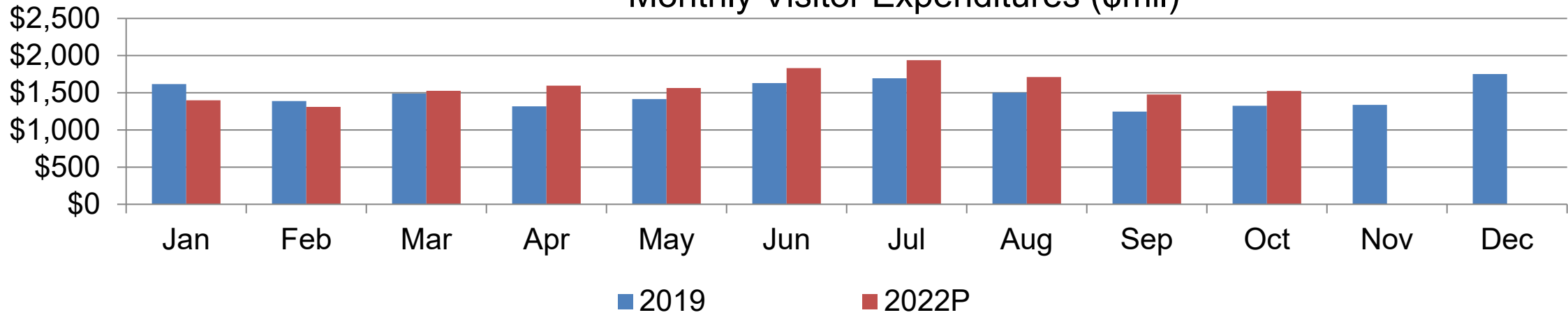
¹ 2022 data are preliminary

² 2020 expenditures 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia, Oceania, Europe and Latin America, visitor spending data were only available from January-March 2020; data for November and December were not available due to limited samples 2020 expenditures do not include supplemental business spending

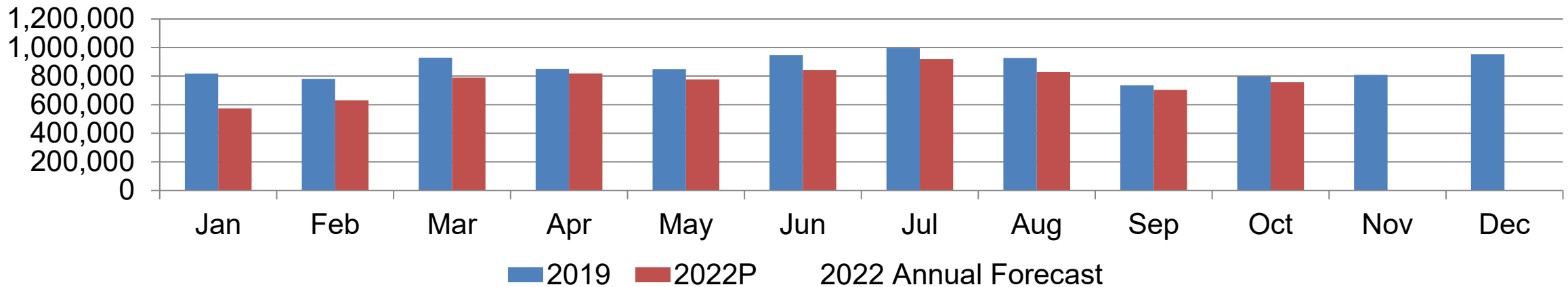
³2020 tax revenues and jobs were calculated based on available spending data from MMA countries detailed in footnote 2

October 2022 Highlights – Expenditures and Arrivals

Monthly Visitor Expenditures (\$mil)



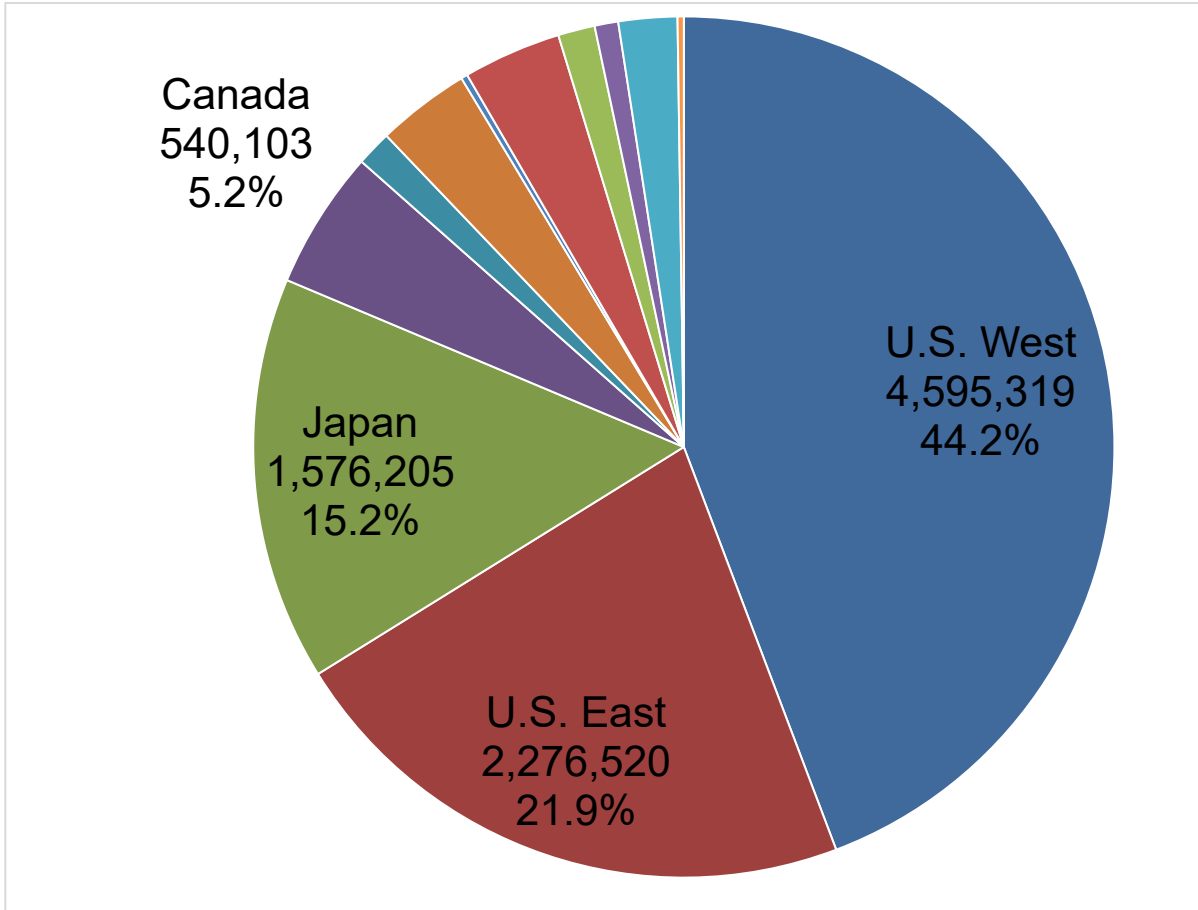
Monthly Arrivals



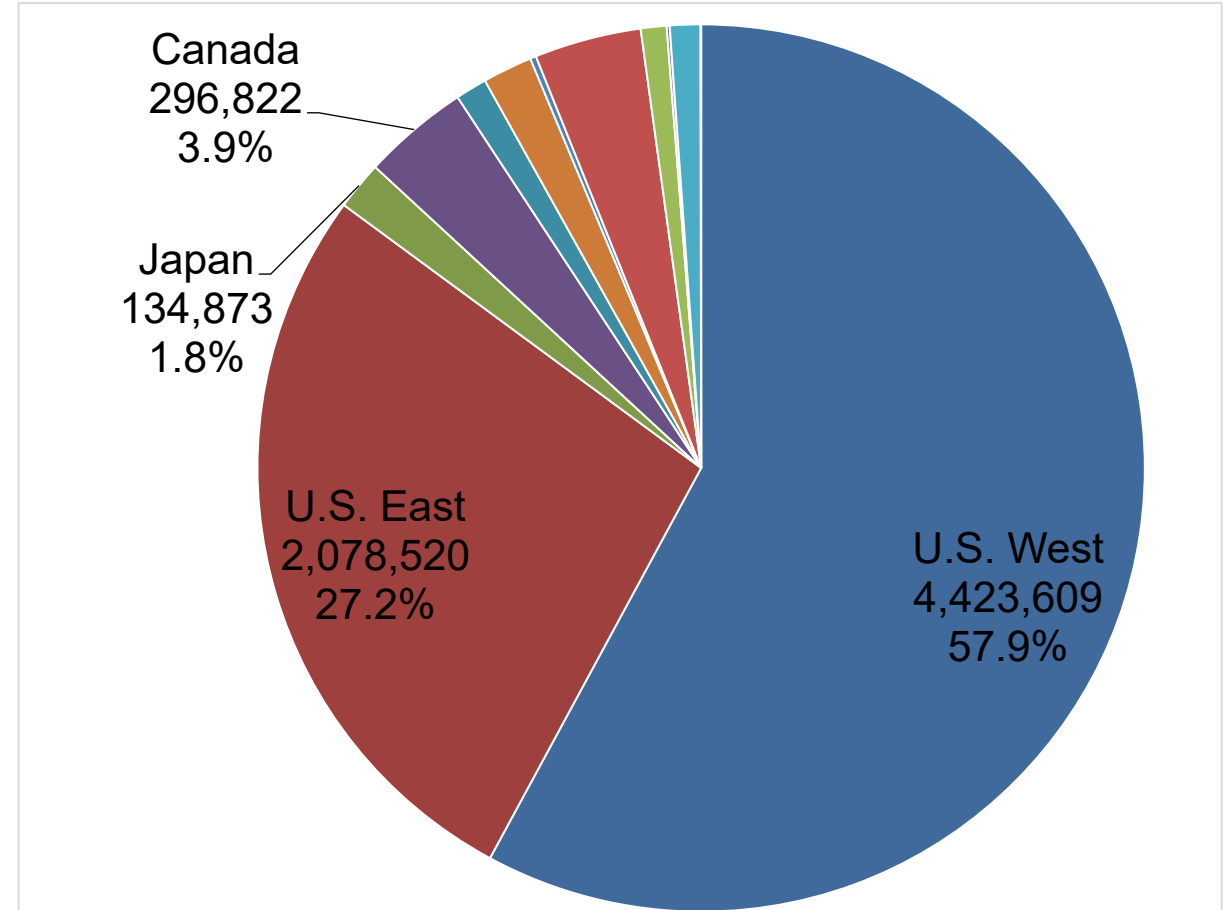
Note: 2022 figures are preliminary.

Visitor Arrival Mix YTD 2022P vs 2019

2019



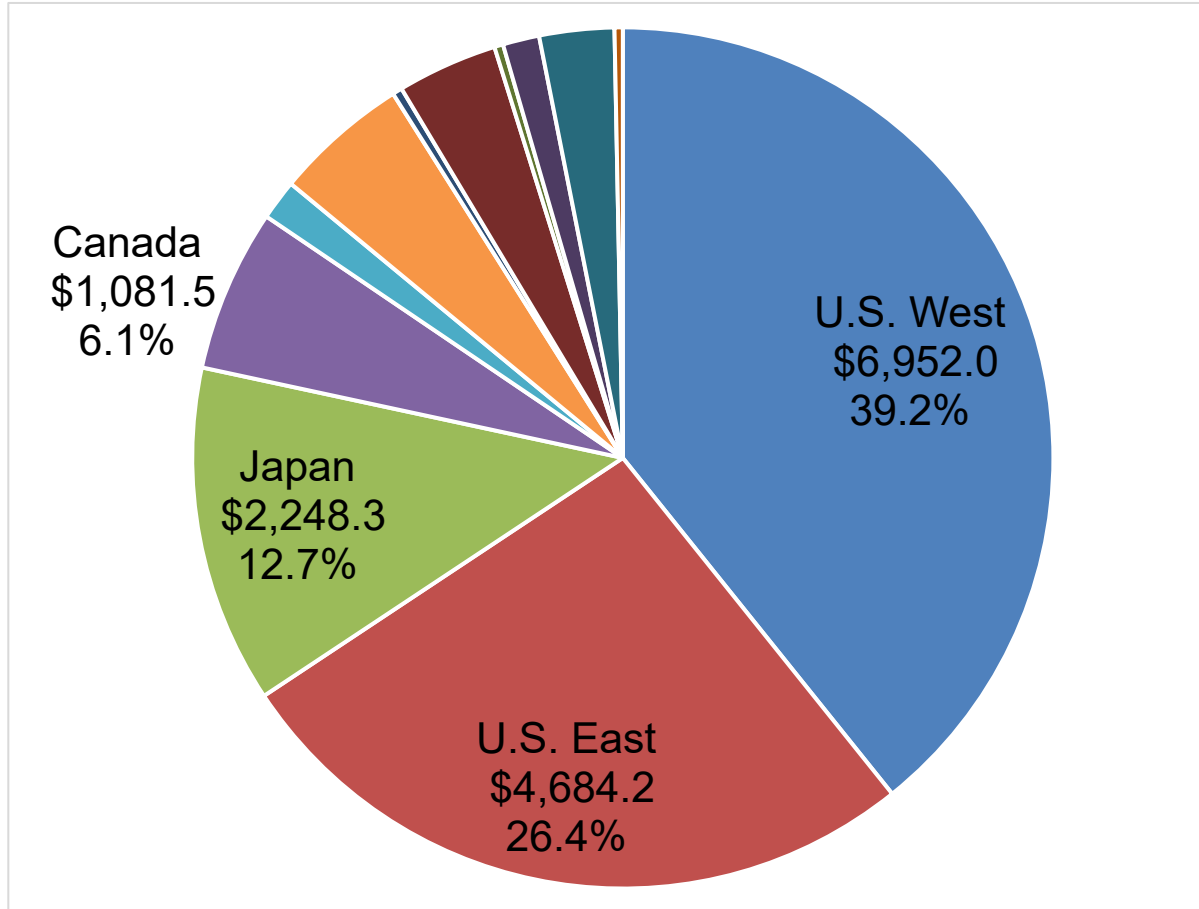
YTD 2022P



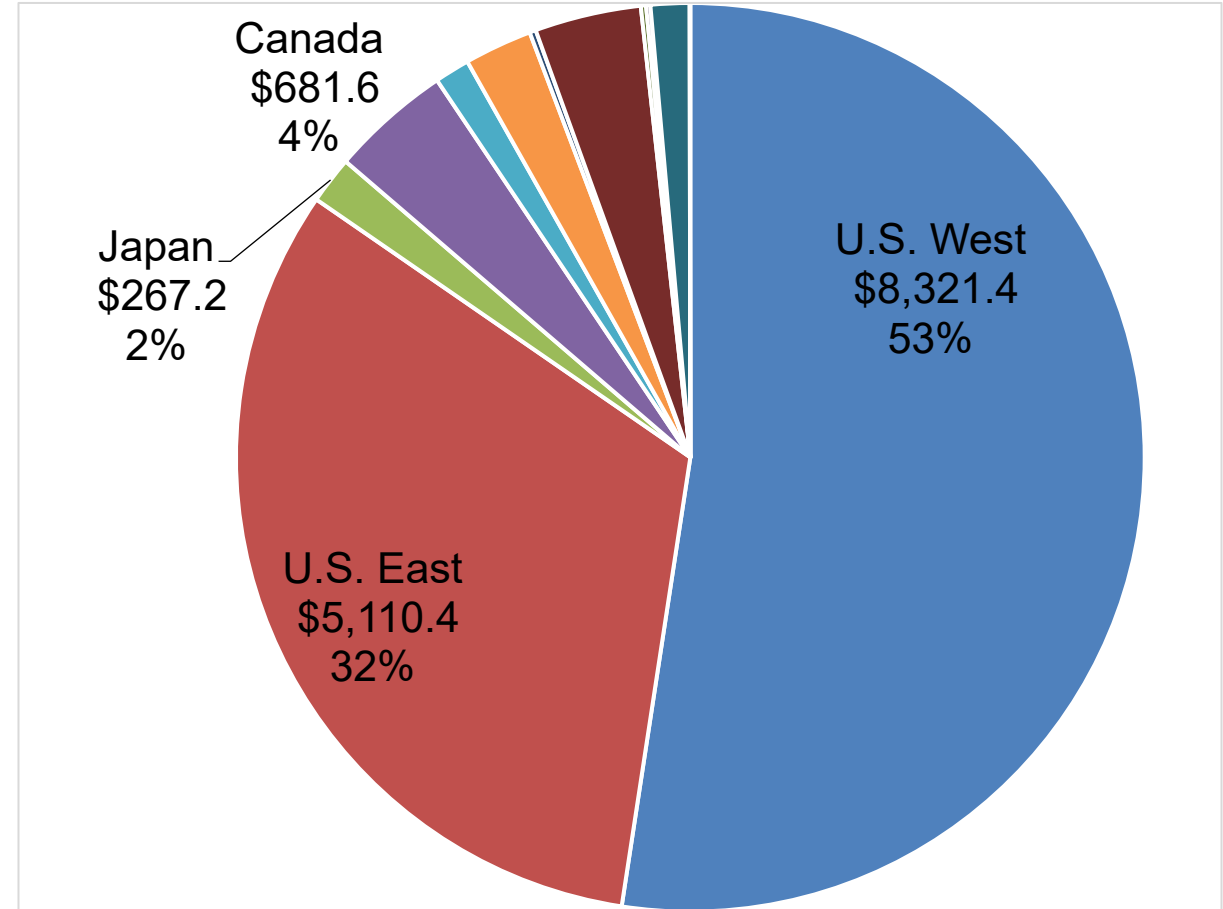
Note: 2022 figures are preliminary.

Visitor Spending Mix YTD 2022P vs 2019

2019

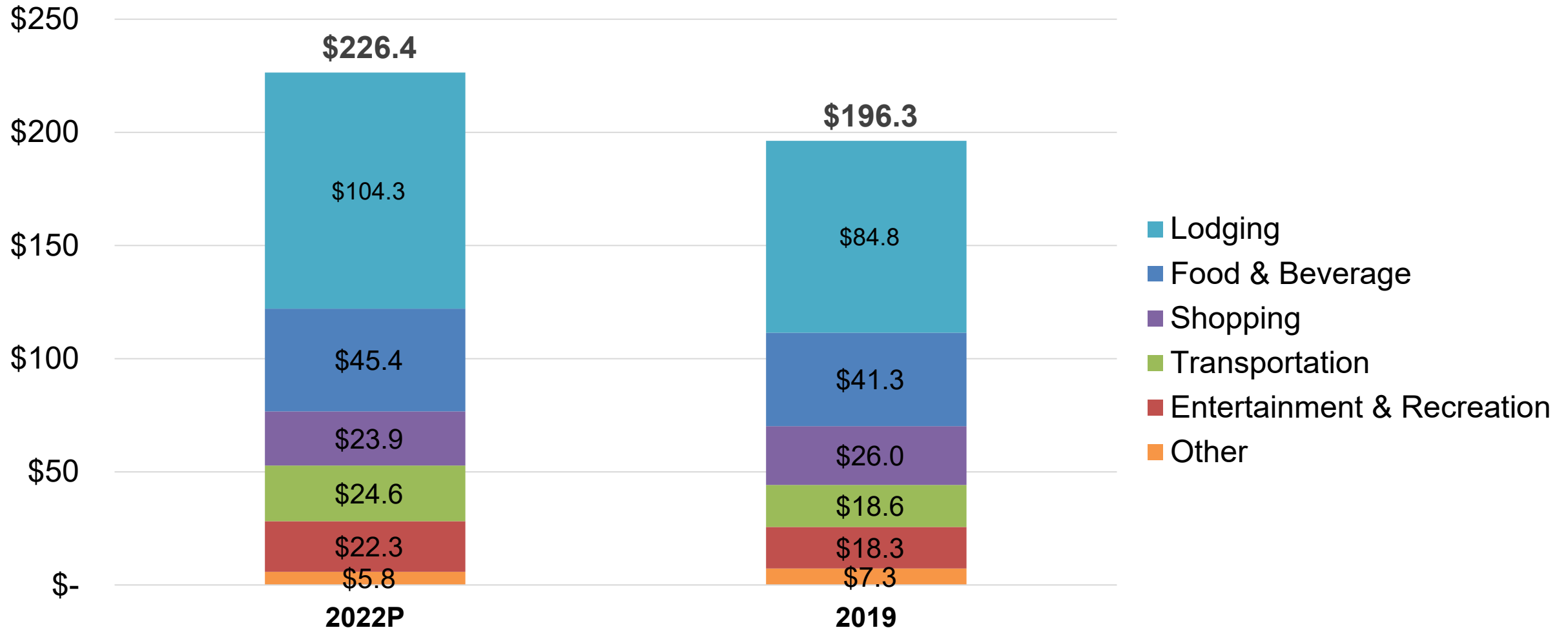


YTD 2022P



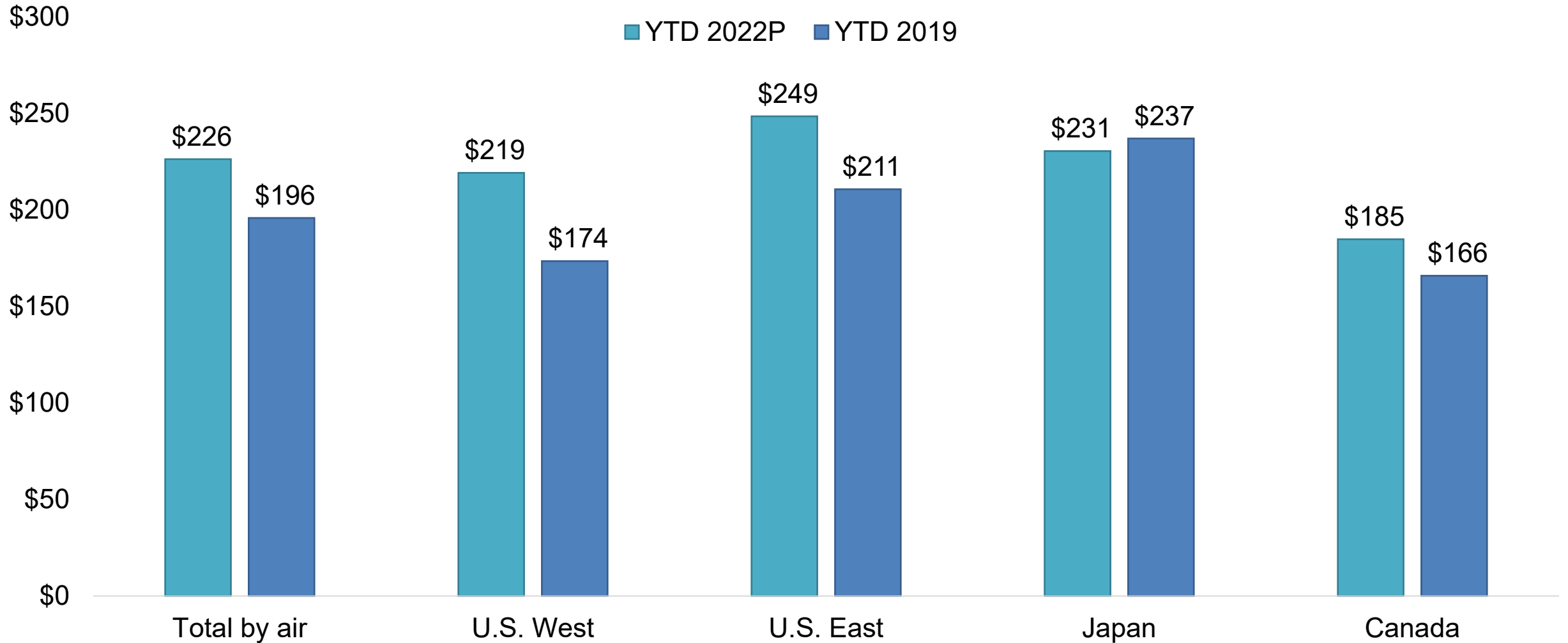
Note: 2022 figures are preliminary.

Spending by Category YTD 2022P vs 2019



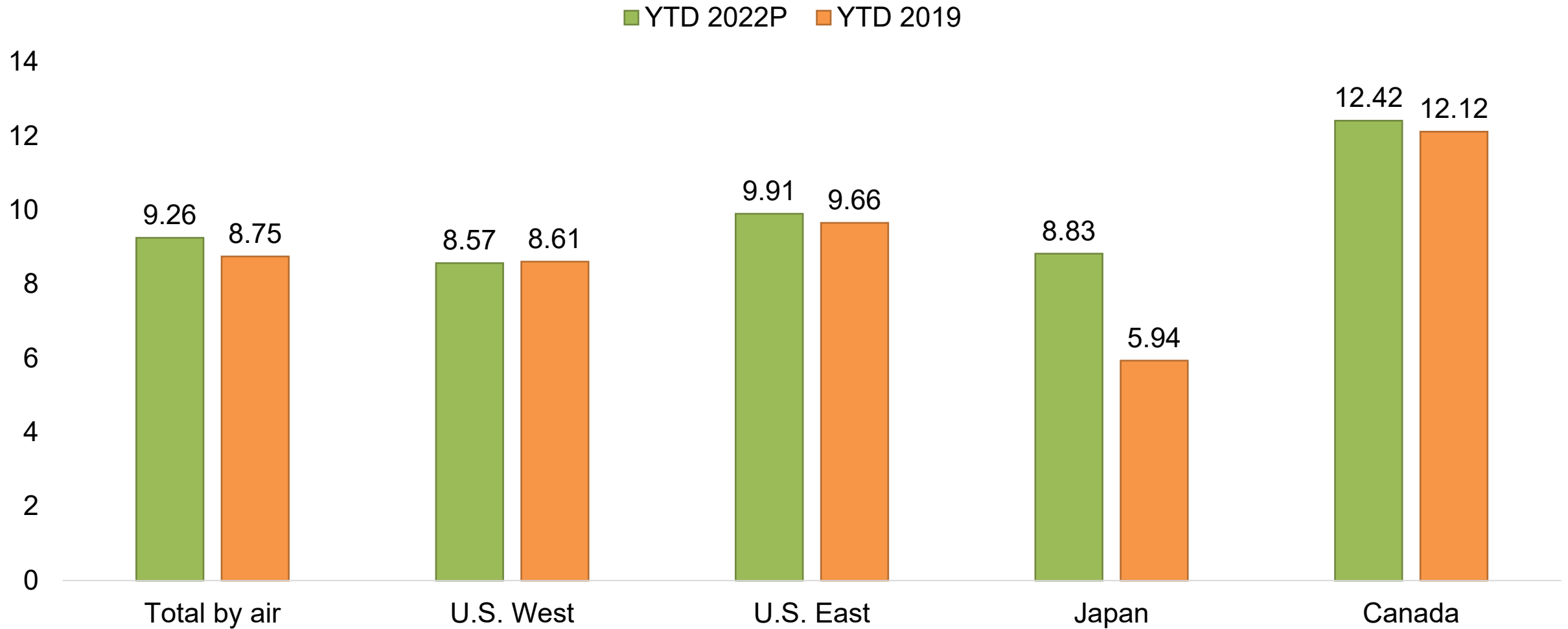
Note: 2022 figures are preliminary.

Personal Daily Spending – YTD 2022P vs. YTD 2019



Note: 2022 figures are preliminary.

Average Length of Stay – YTD 2022P vs. YTD 2019

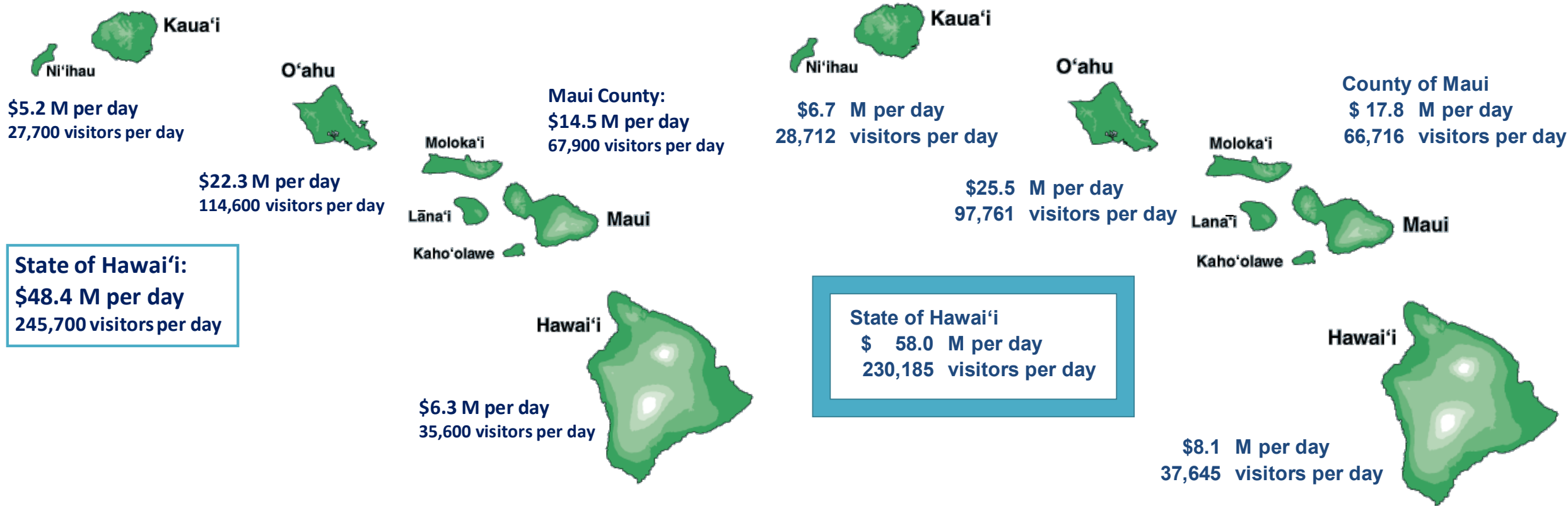


Note: 2022 figures are preliminary.

Tourism Impacts by County – YTD 2022P vs. 2019

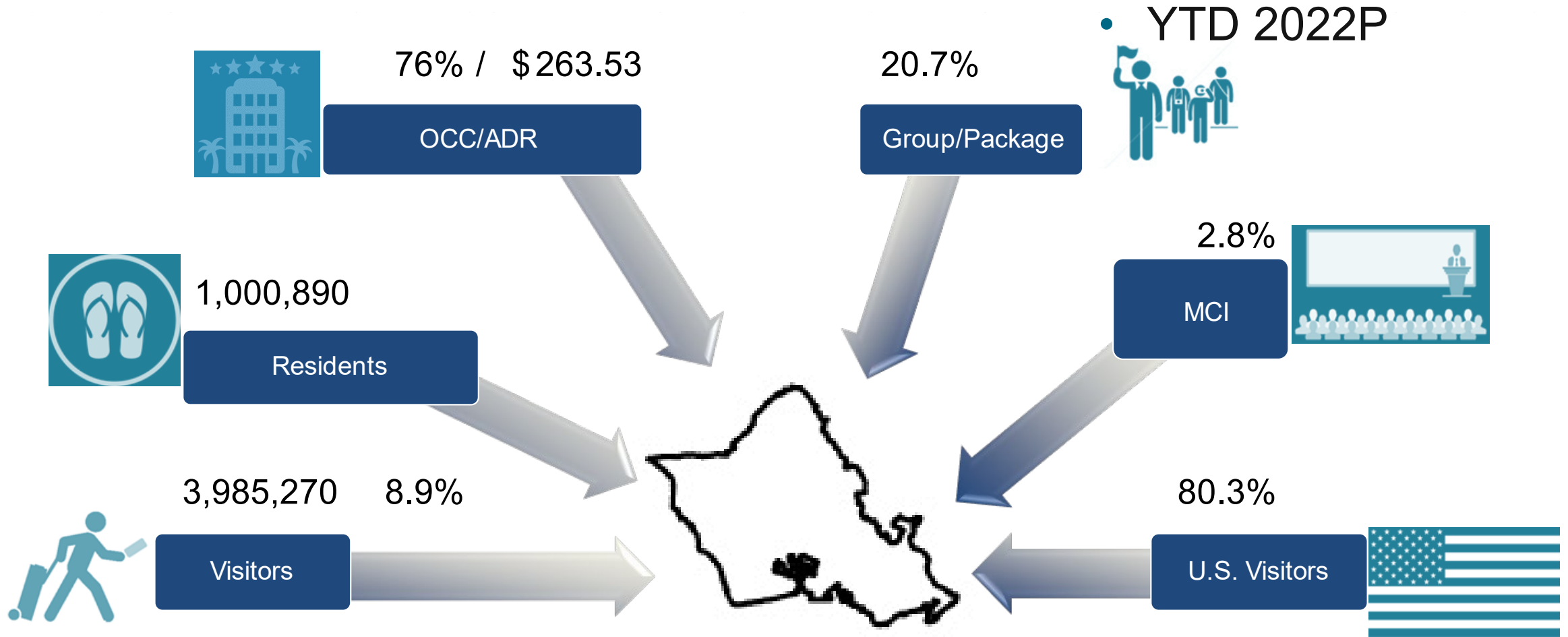
2019

YTD 2022P



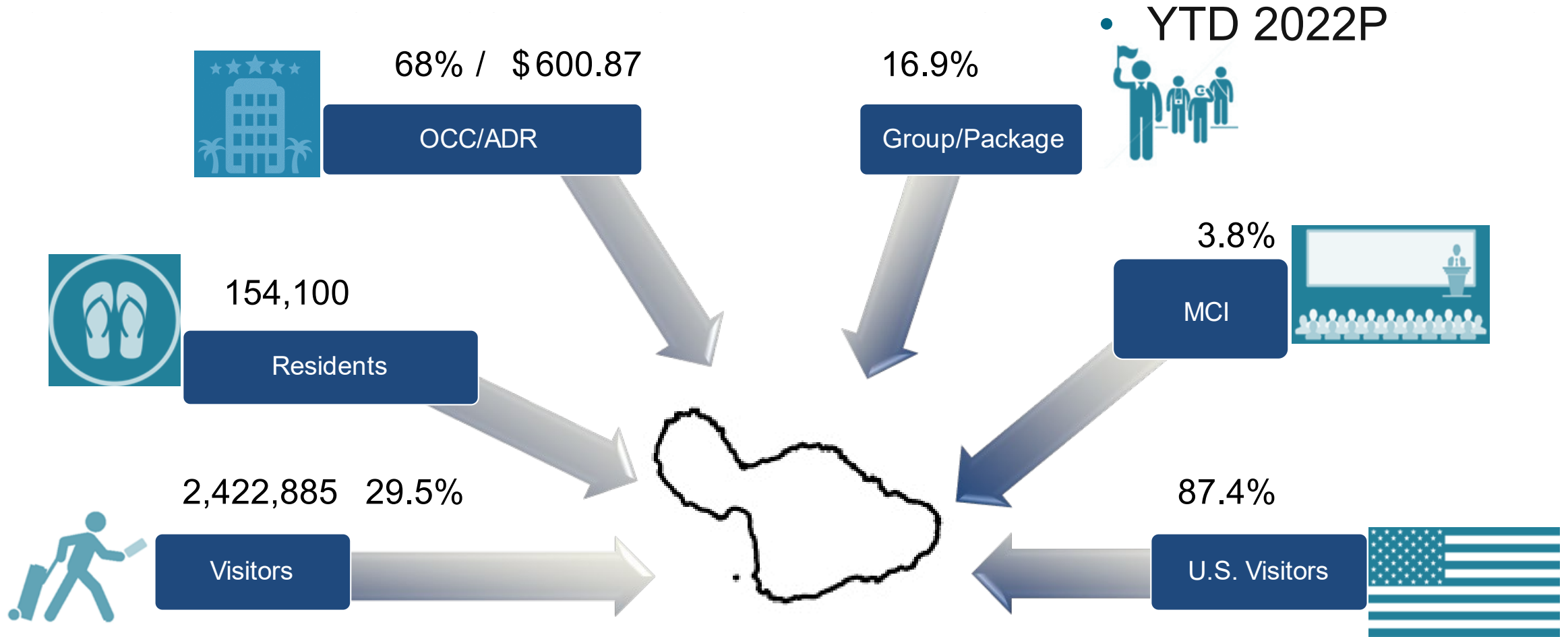
Note: 2022 figures are preliminary.

O'ahu



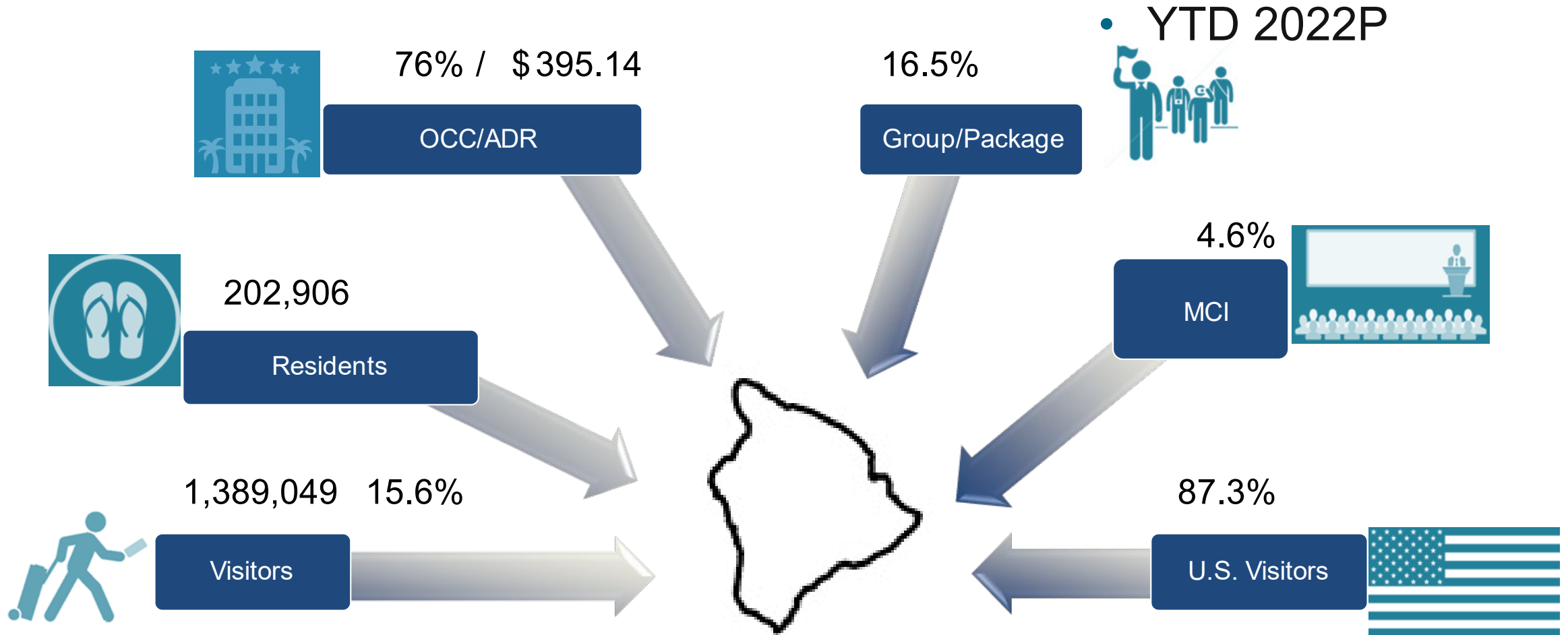
Note: 2022 figures are preliminary.

Maui



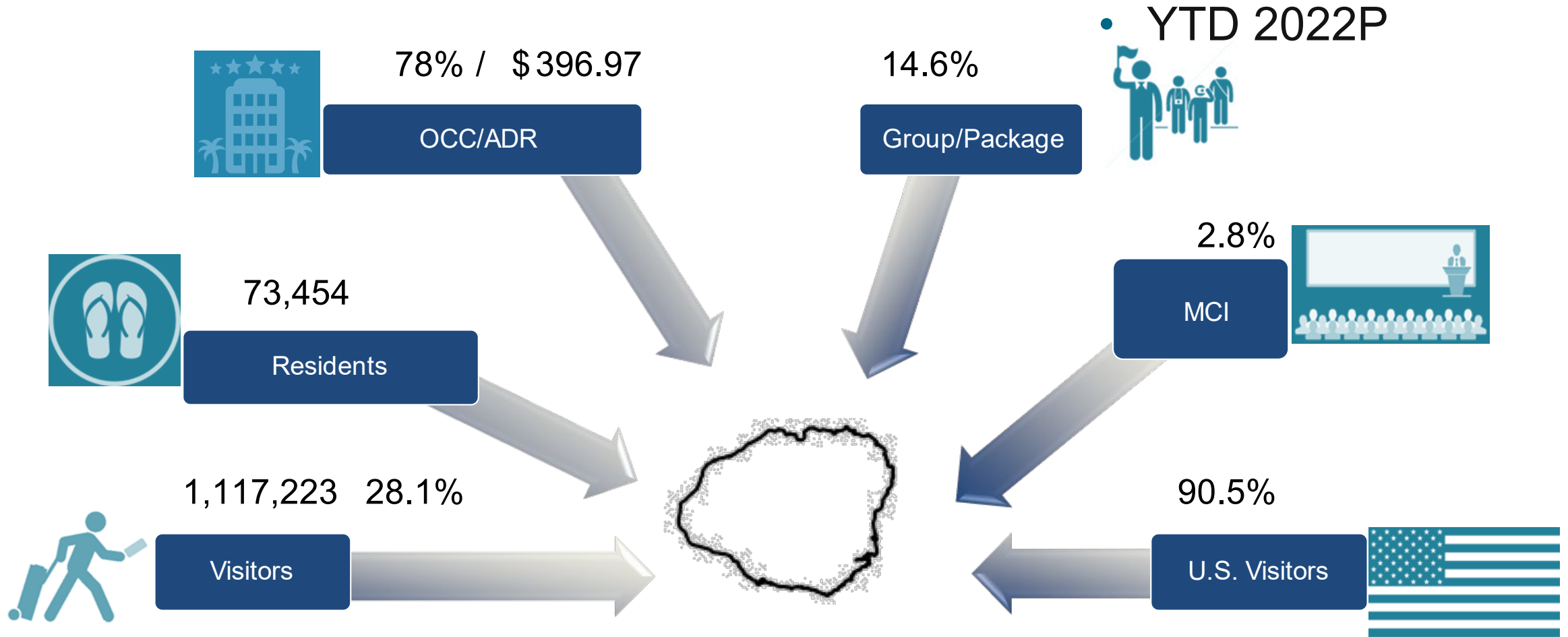
Note: 2022 figures are preliminary.

Hawai'i Island



Note: 2022 figures are preliminary.

Kaua'i



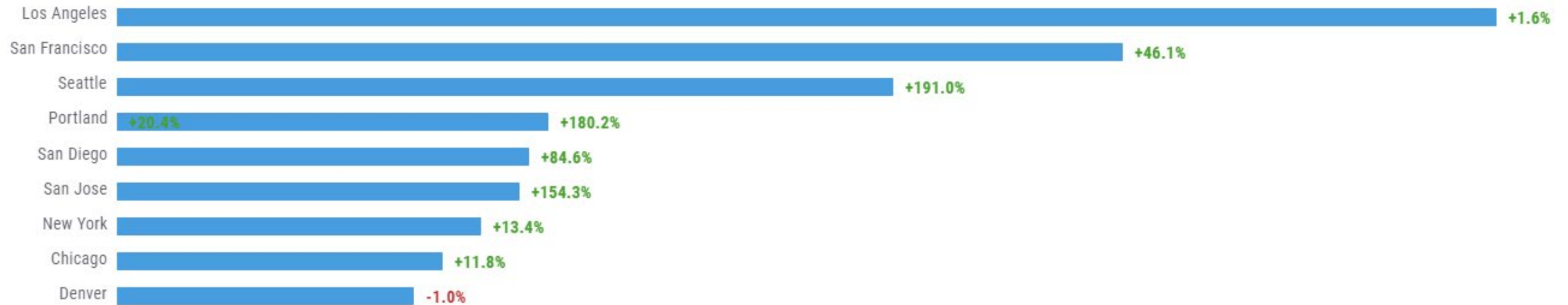
Note: 2022 figures are preliminary.

Six Month Outlook: United States



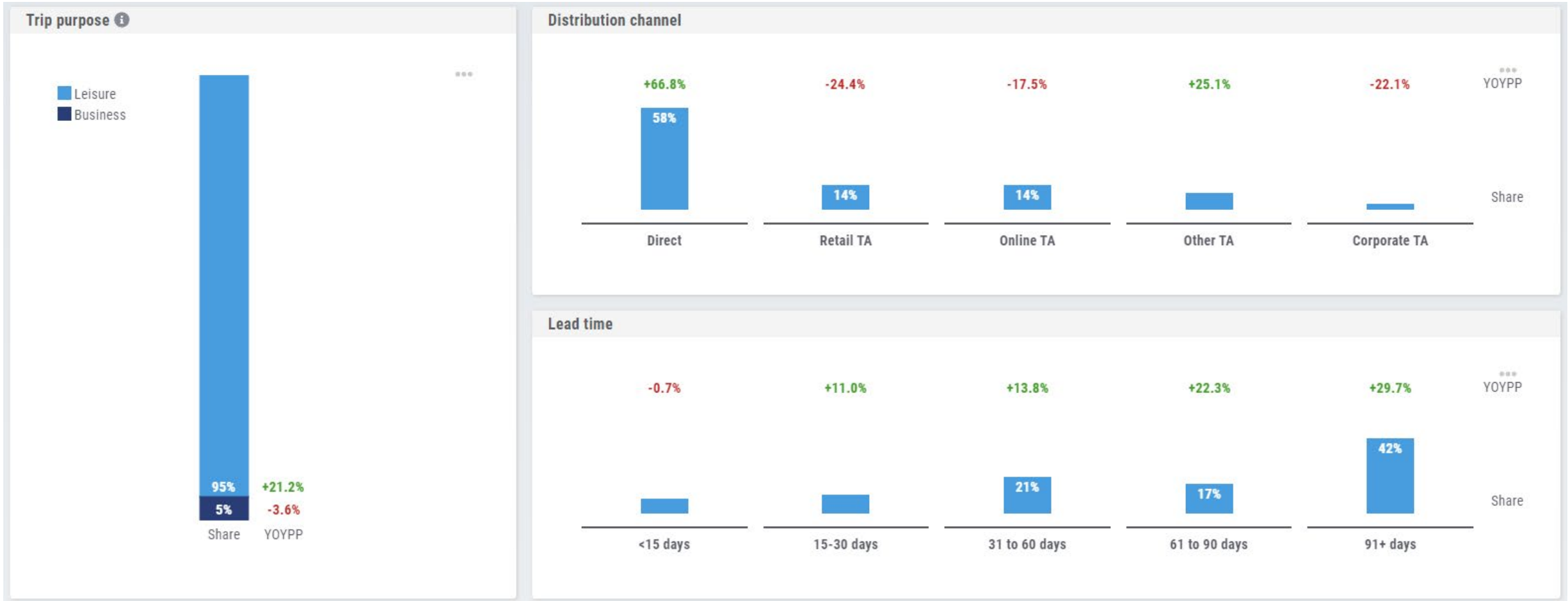
Source: ARC/ForwardKeys Destination Gateway

Trip Origins: United States



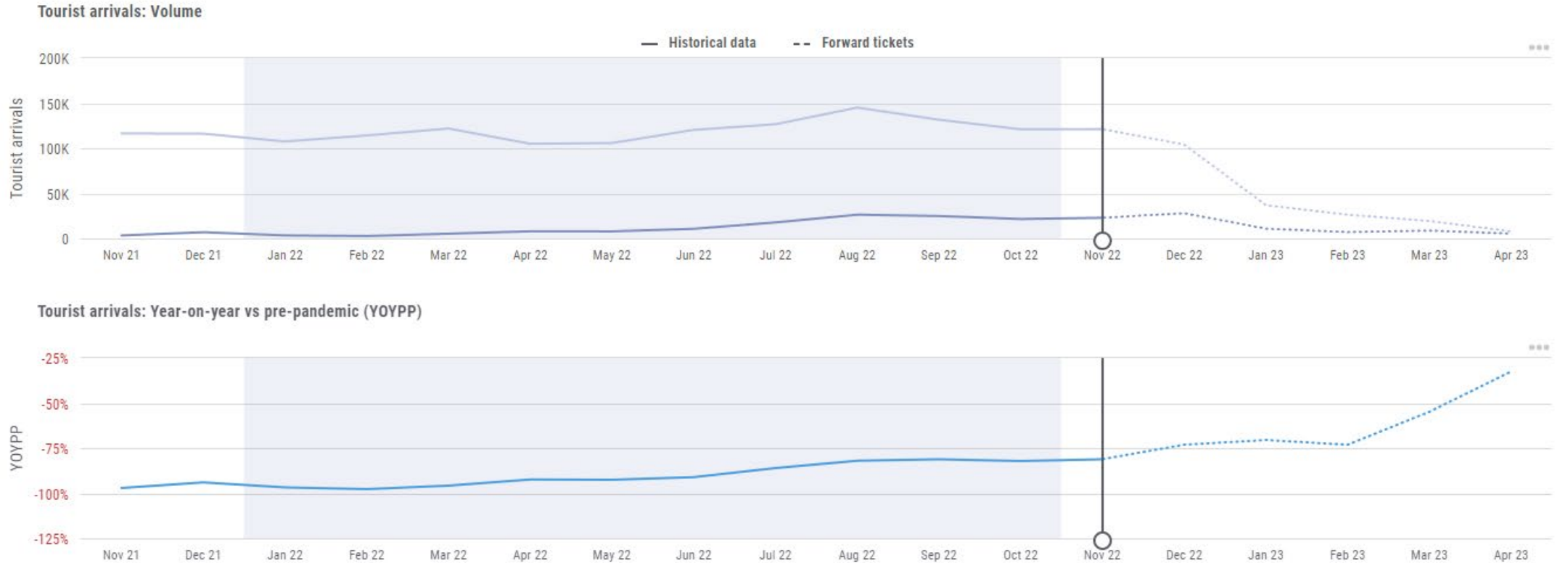
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Trip Characteristics: United States



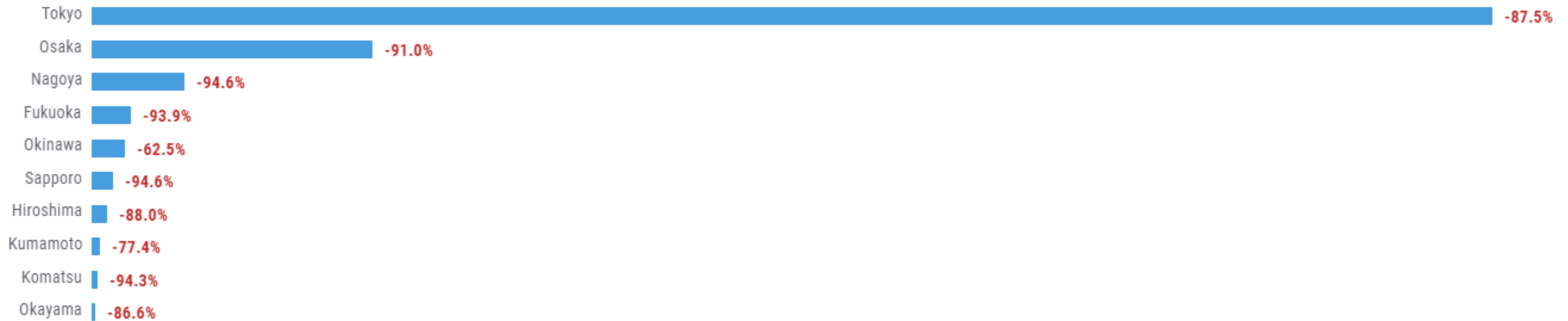
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Six Month Outlook: Japan



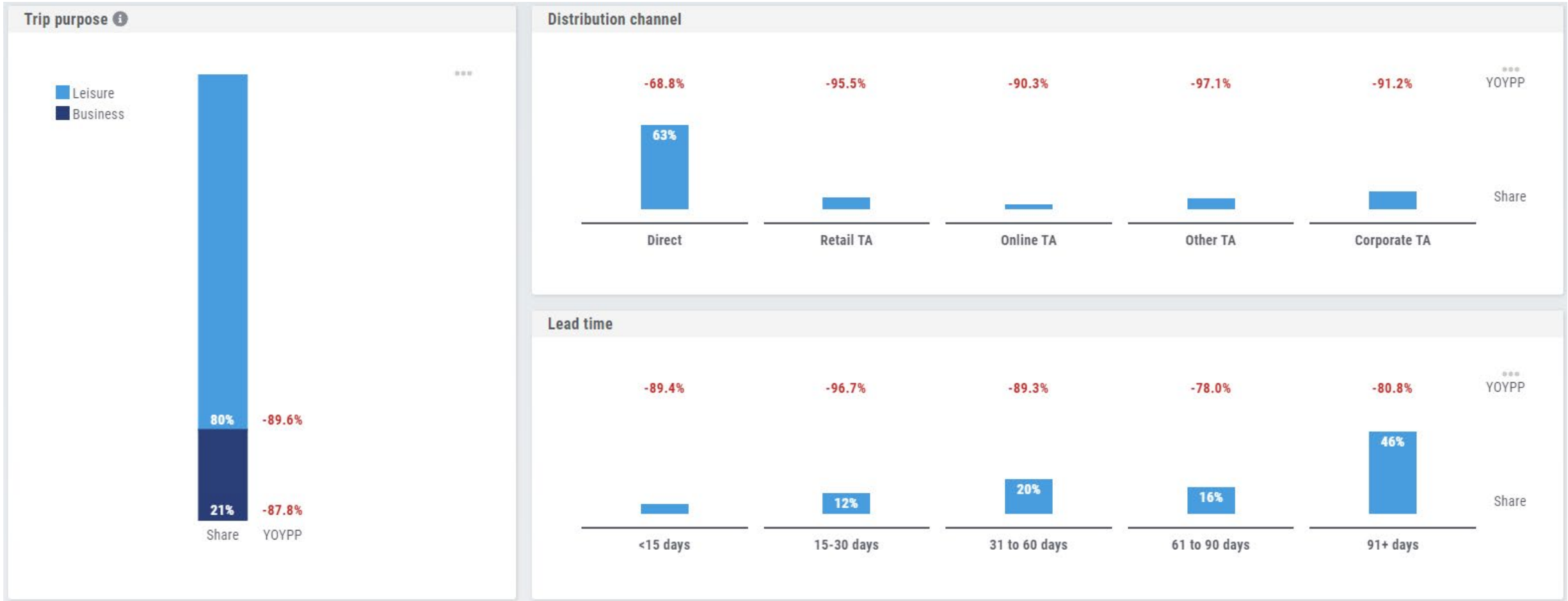
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Trip Origins: Japan



Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Japan



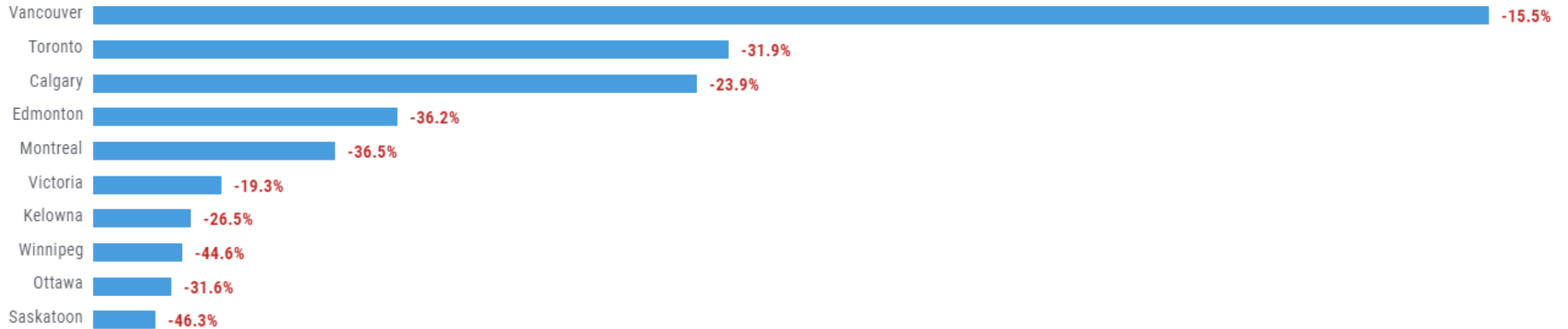
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway

Trip Origins: Canada



Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Canada



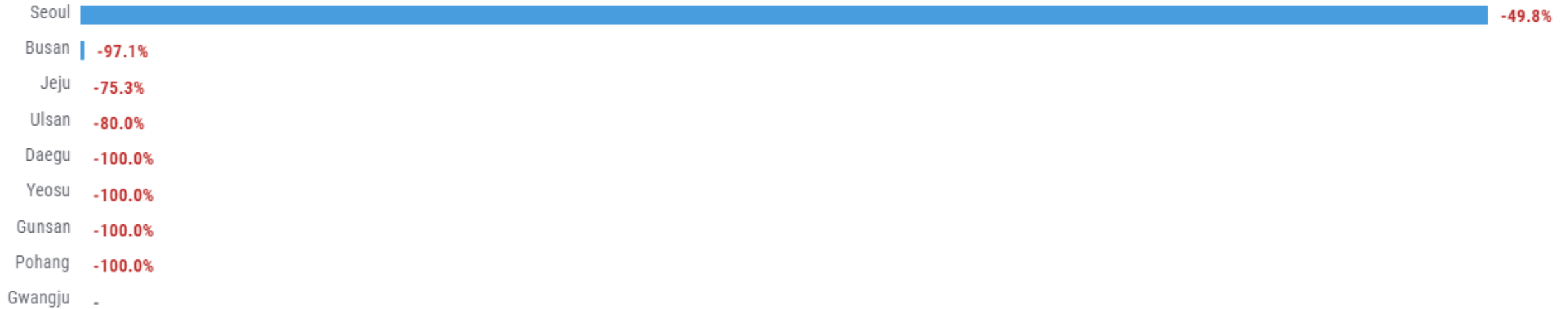
Source: ARC/ForwardKeys Destination Gateway

Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway

Trip Origins: Korea



Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Korea



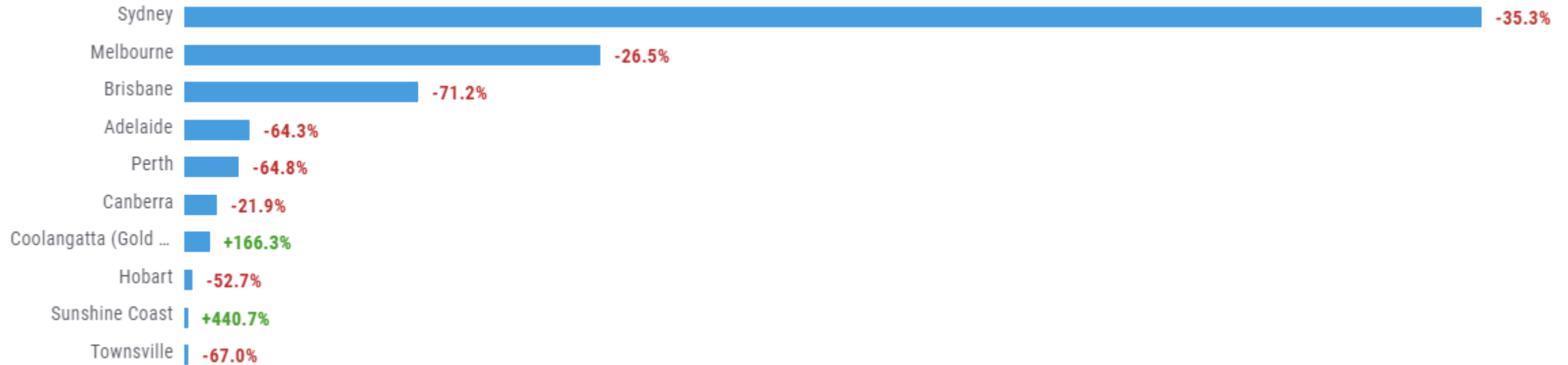
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Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

Trip Origins: Australia



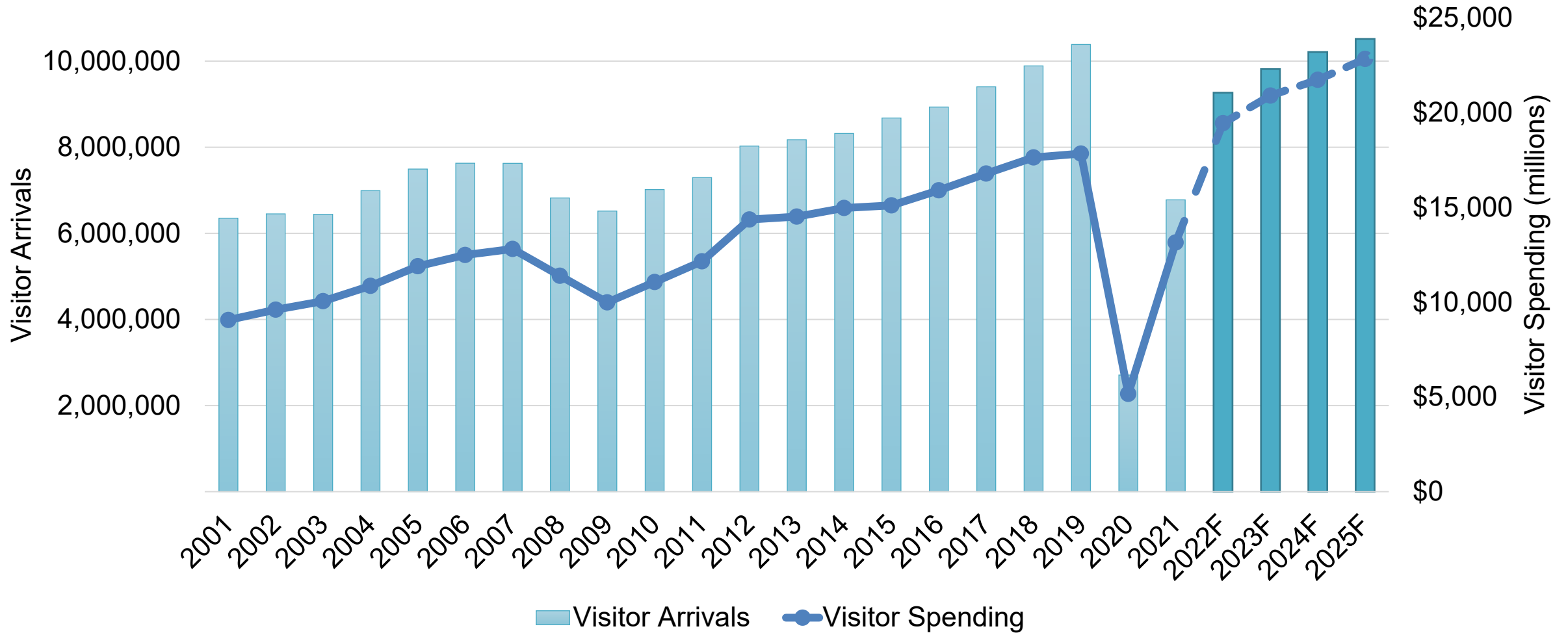
Source: ARC/ForwardKeys Destination Gateway

Trip Characteristics: Australia



Source: ARC/ForwardKeys Destination Gateway

DBEDT Tourism Forecast



Source: DBEDT, Q4 2022 Forecast

MAHALO!

