

Tourism Economics Symphony Dashboards

March 2021



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Month
March 2021

Visitor Arrivals

Total Visitors & % change YOY, March 2021

439.8K ▲ 2.1%

Expenditure by Visitors

Total Expenditure & % change YOY, March 2021

\$745.9M ▲ 3.8%

Avg. Length of Stay

All visitors, March 2021

9.7 Days

Visitors from International Markets

% change YOY & no of visitors

Japan	▼ -97.7%	1,051
Other Asia	▼ -82.1%	580
Europe	▼ -85.8%	539
Canada	▼ -98.8%	326
United Kingdom	▼ -77.3%	307
Korea	▼ -87.2%	306
Mexico	▼ -28.9%	246
Oceania	▼ -98.9%	143
China	▼ -34.1%	135
New Zealand	▼ -96.1%	114

Source: HTA



Top 10 Domestic Markets

% change YOY & no of visitors

California	▲ 61.3%	142,204
Washington	▲ 26.5%	39,218
Texas	▲ 4.9%	25,266
Oregon	▲ 54.9%	21,949
Utah	▲ 93.9%	19,994
Colorado	▲ 65.6%	18,940
Arizona	▲ 2.5%	18,264
Illinois	▲ 132.1%	15,154
Nevada	▲ 63.7%	11,734
Minnesota	▼ -5.7%	9,858

Source: HTA

Top POIs Visited, March 2021

Ranked by number of visits by visitors. % share of visits by residents & visitors

	Residents	Visitors
Kalakaua Avenue	59%	41%
Lahaina Bypass	54%	46%
Front Street in Lahaina	44%	56%
Kailua town and beach	89%	11%
Ko Olina Resort	50%	50%
Upcountry Maui	89%	11%
Kapahulu Avenue	78%	22%
Kaanapali Kai Golf Course	41%	59%
Kapiolani Park	71%	29%
Kahului Airport Car Rental location	34%	66%
Royal Hawaiian Shopping Center	52%	48%
Whalers Village Shopping Center	31%	69%
Lahaina Cannery Mall	50%	50%
Kailua-Kona Town	59%	41%
Hana/Road to Hana	59%	41%
Ala Moana Shopping Center	88%	12%
Lahaina Market Place Shopping Center	36%	64%
Honolulu Watershed Forest Reserve	85%	15%
Chinatown	94%	6%
Paia Town	56%	44%
International Marketplace	51%	49%
Azeka Shopping Center	70%	30%
The Shops at Wailea	47%	53%
Kaanapali Beach	22%	78%
Lahaina Banyan Tree Park	32%	68%
The Bay Course at Kapalua Resort	45%	55%
Queens MarketPlace	48%	52%
Ala Moana Regional Park	78%	22%
Pearl Harbor National Memorial	30%	70%
Fort DeRussy Beach Park	36%	64%

Source: UM

* Residents refer to residents of the State of Hawaii, all islands

State of Hawaii Lodging Summary

March 2021



Month
March 2021

Island
State of Hawaii

March 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	48.4%	▼ -10.4%	2,153.4K	▼ -37.0%	1,041.4K	▼ -48.1%
Hotel	43.1%	▼ -0.7%	1,566.1K	▼ -6.8%	675.7K	▼ -8.4%
Short Term Rentals	62.3%	▼ -1.7%	587.3K	▼ -32.6%	365.7K	▼ -34.4%
Timeshare						

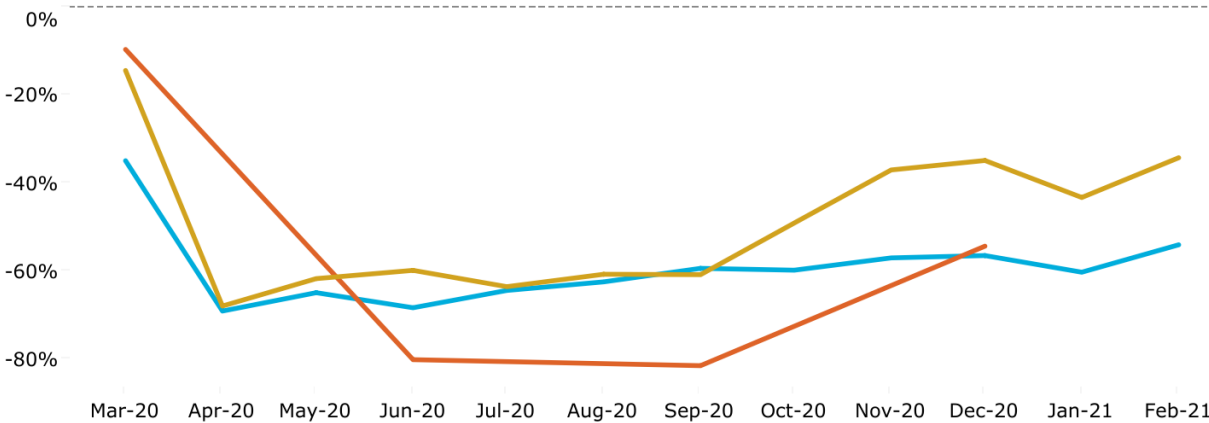
March 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	37.4%	▼ -35.9%	6,315.9K	▼ -22.4%	2,361.8K	▼ -60.4%
Hotel	32.4%	▼ -37.8%	4,519.8K	▼ -7.4%	1,465.1K	▼ -57.2%
Short Term Rentals	49.9%	▼ -26.3%	1,796.1K	▼ -25.1%	896.7K	▼ -50.9%
Timeshare				▼ -100.0%		▼ -100.0%

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

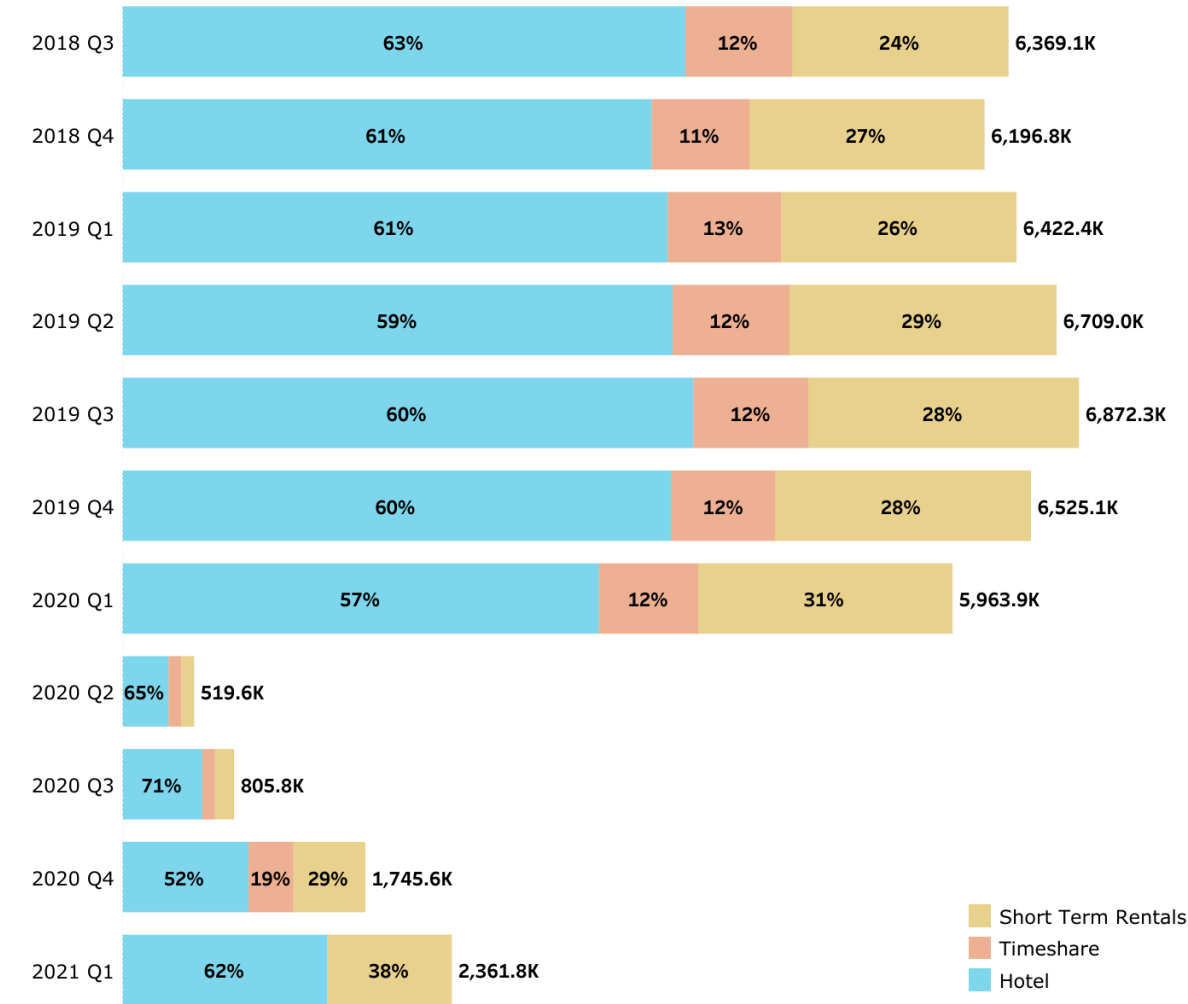
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

March 2021, State of Hawaii



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
March 2021Island
Oahu

Visitor Arrivals

Total Visitors & % change YOY, March 2021

206.9K ▼ -13.2%

Expenditure by Visitors

Total Expenditure & % change YOY, March 2021

\$260.0M ▼ -13.1%

Avg. Length of Stay

All visitors, March 2021

8.5 Days

Visitors from International Markets

% change YOY & no of visitors

Japan	▼ -97.6%	1,005
Other Asia	▼ -84.2%	478
Europe	▼ -88.9%	306
Korea	▼ -87.8%	278
Canada	▼ -98.7%	133
China	▼ -39.9%	104
Oceania	▼ -99.5%	72
New Zealand	▼ -98.0%	56
Taiwan	▼ -94.3%	24
Australia	▼ -99.8%	16

Source: HTA

Origin Market Share

% share of visitor for March 2021

March
2021March
2020

US West US East International

Source: HTA

Top 10 Domestic Markets

% change YOY & no of visitors

California	▲ 70.5%	68,581
Washington	▲ 16.8%	14,142
Texas	▲ 6.6%	13,870
Utah	▲ 102.1%	9,497
Arizona	▲ 6.7%	8,388
Illinois	▲ 141.1%	7,719
Florida	▲ 54.0%	6,642
Colorado	▲ 73.3%	6,491
Oregon	▲ 37.8%	6,453
Nevada	▲ 80.1%	6,072

Source: HTA

Top POIs Visited by Visitors

% share of visits, March 2021

Kalakaua Avenue	9.2%
Kailua town and beach	4.5%
Ko Olina Resort	4.0%
Kapahulu Avenue	3.8%
Kapiolani Park	3.4%
Royal Hawaiian Shopping Center	3.2%
Ala Moana Shopping Center	2.7%
Honolulu Watershed Forest Reserve	2.5%
Chinatown	2.5%
International Marketplace	2.1%
Ala Moana Regional Park	1.6%
Pearl Harbor National Memorial	1.6%
Fort DeRussy Beach Park	1.5%
Waikiki Beach	1.5%
Kahana Valley State Park	1.5%

Source: UM

Top POIs Visited by Residents

% share of visits, March 2021

Chinatown	10.4%
Kailua town and beach	9.8%
Ala Moana Shopping Center	5.3%
Kapolei Shopping Center	4.1%
Honolulu Watershed Forest Reserve	3.8%
Waialae Avenue	3.7%
Kalakaua Avenue	3.5%
Pearl Ridge Shopping Center	3.5%
Kapahulu Avenue	3.4%
Kalanianaʻole Beach Park (formerly Nanak..	3.3%
Kapiolani Park	2.2%
Kahala Mall Shopping Center	2.1%
Windward Mall Shopping Center	1.5%
Ala Moana Regional Park	1.5%
Kailua Town Center Shopping Center	1.5%

Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Island

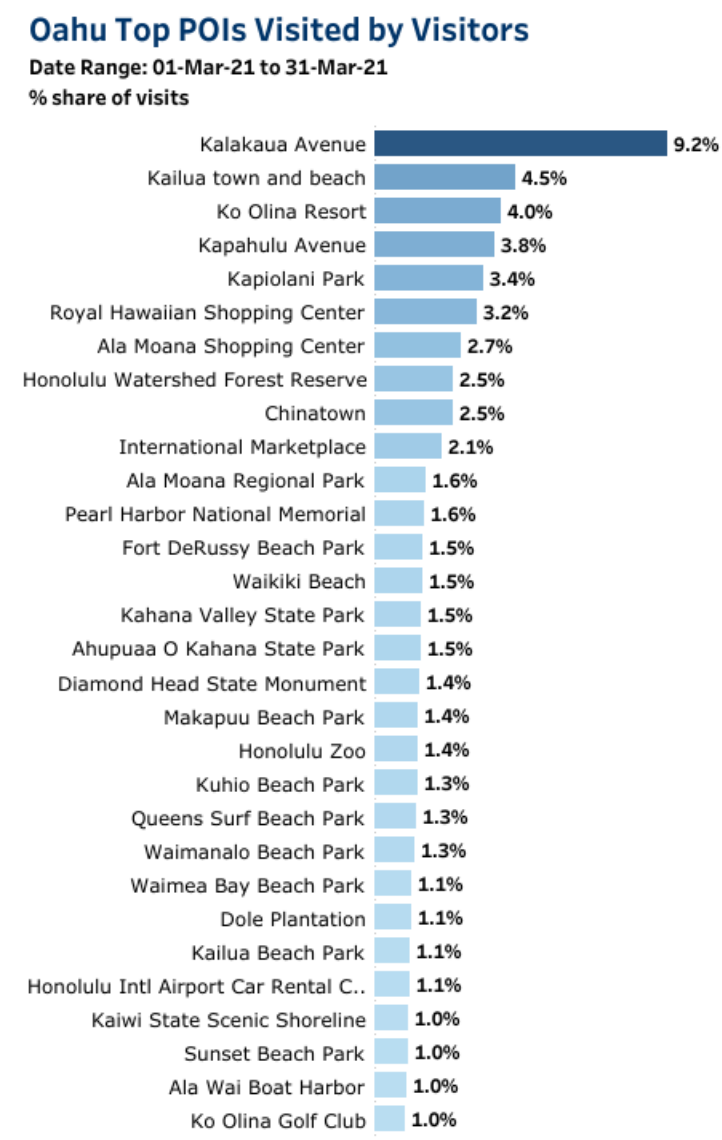
Oahu

From Date

01-Mar-21

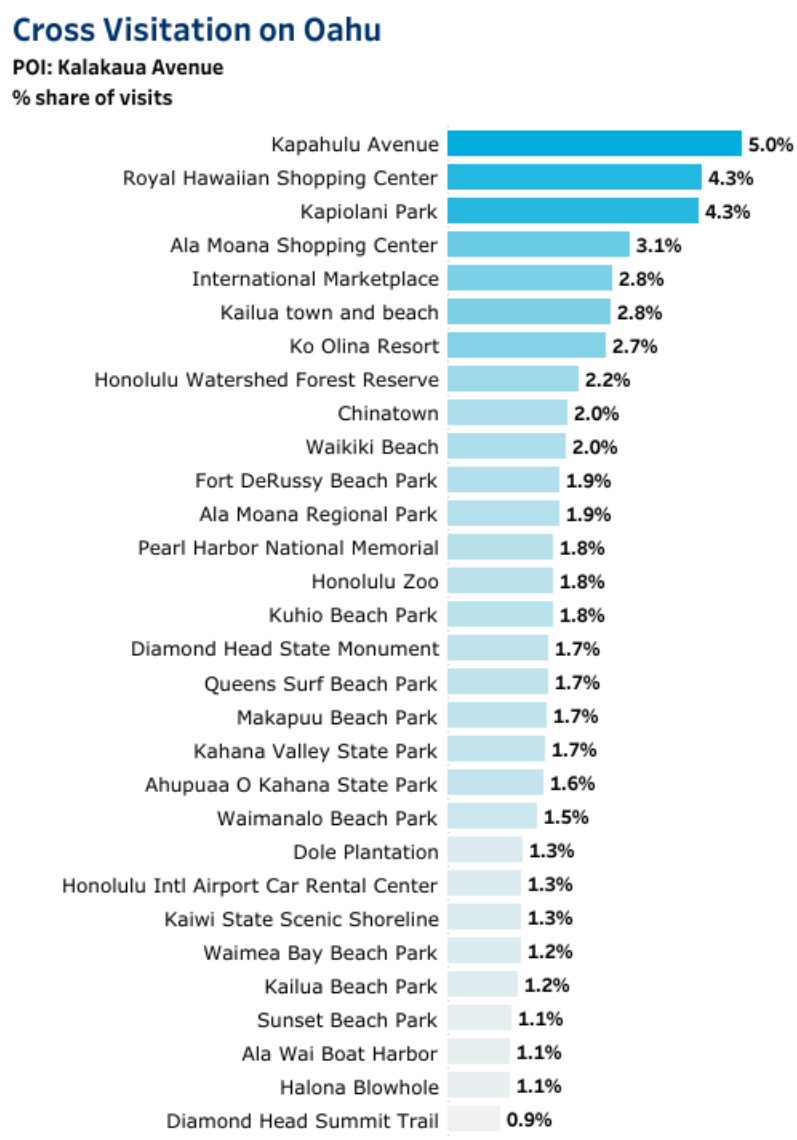
To Date

31-Mar-21

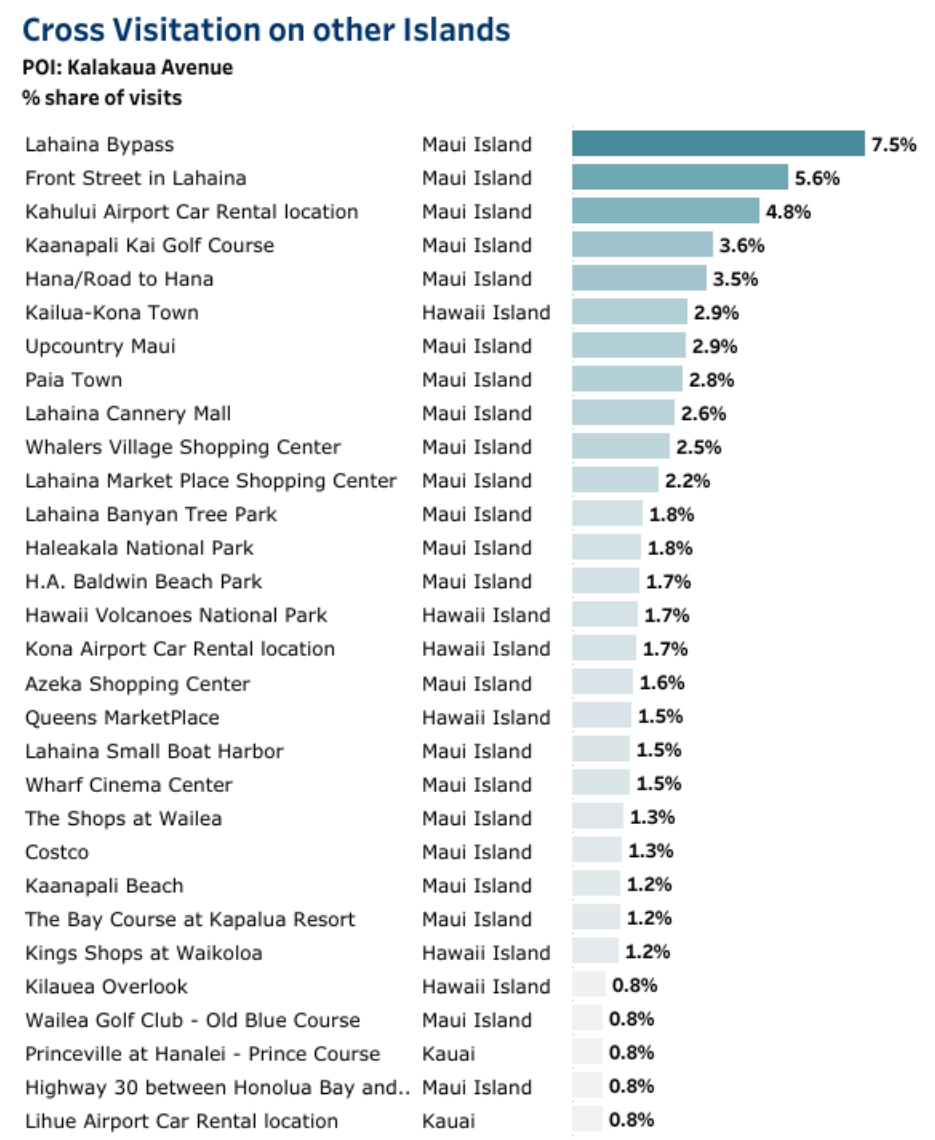


Source: UM

Sample Size: 20,225



Source: UM



Source: UM

Oahu Visitation Insights for Residents

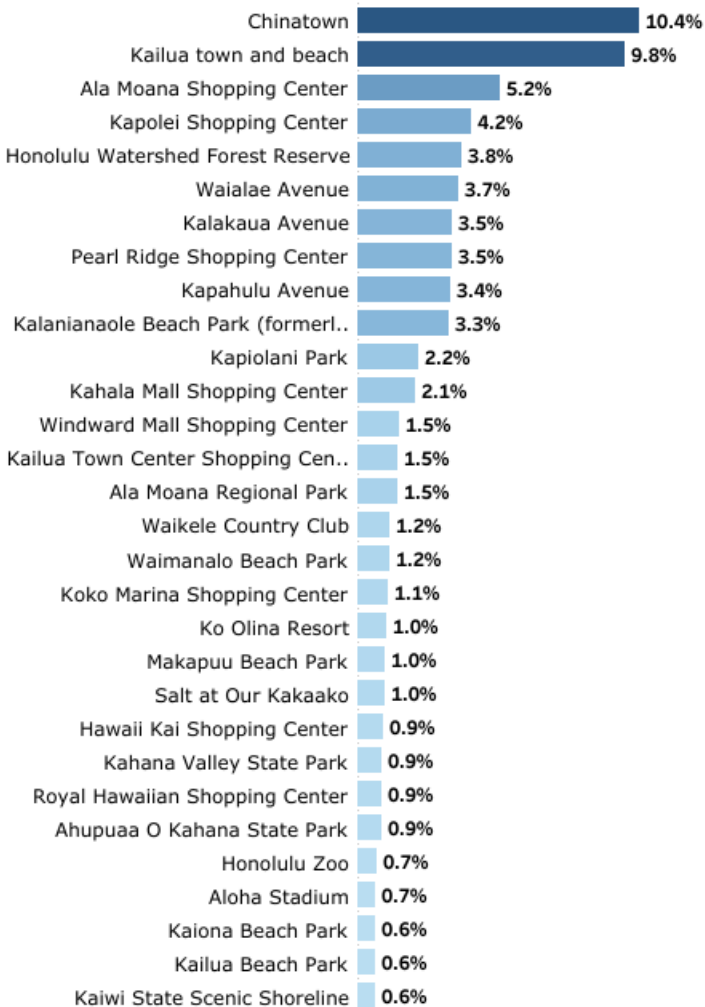
Date Range: 01-Mar-21 to 31-Mar-21

Island	Residence County	From Date	To Date
Oahu	Honolulu, HI	01-Mar-21	31-Mar-21

Oahu Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

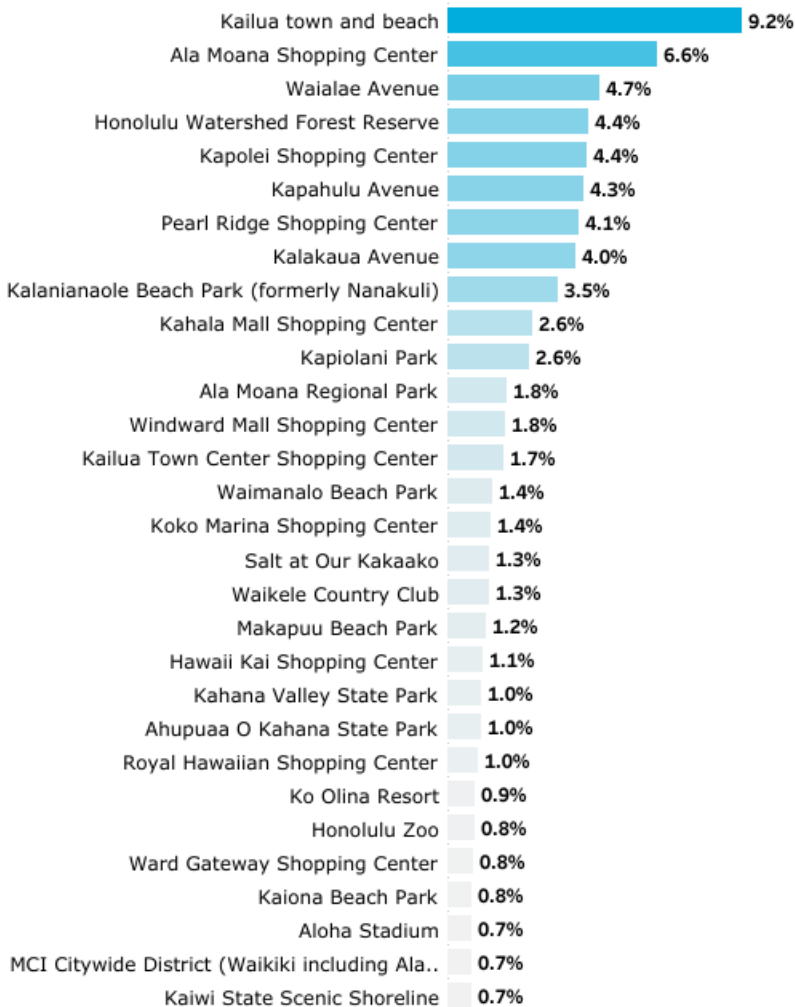


Source: UM

Cross Visitation on Oahu

POI: Chinatown

% share of visits

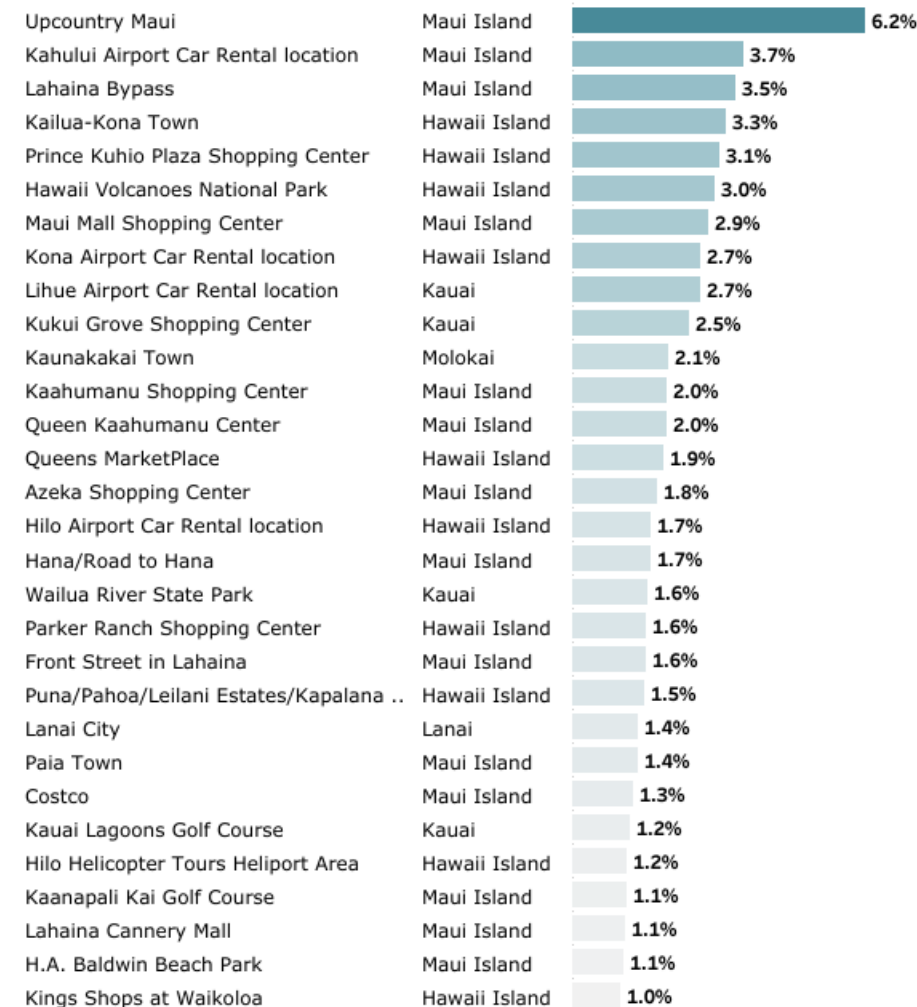


Source: UM

Cross Visitation on other Islands

POI: Chinatown

% share of visits



Source: UM

Sample Size: 61,251

Month
March 2021

Island
Oahu

March 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	44.0%	▼ -7.6%	1,002.6K	▼ -29.7%	441.0K	▼ -40.1%
Hotel	40.4%	▼ -2.0%	870.1K	▼ -8.3%	351.8K	▼ -12.7%
Short Term Rentals	67.3%	▲ 9.2%	132.5K	▼ -46.2%	89.2K	▼ -37.7%
Timeshare						

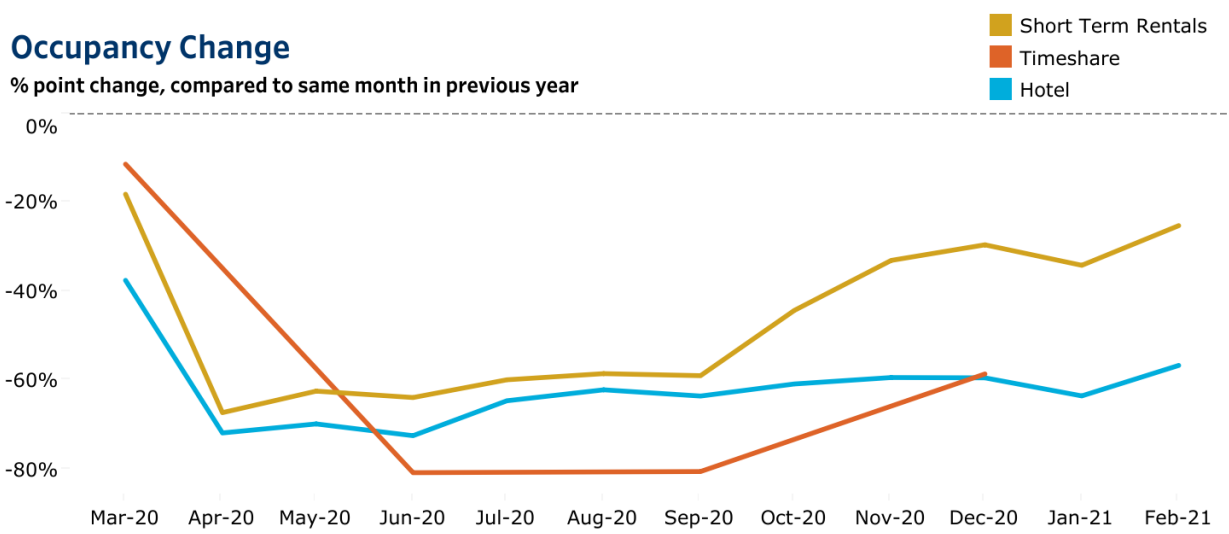
March 2021 YTD Calendar Year & YOY Change

..	34.8%	▼ -37.6%	2,899.3K	▼ -21.0%	1,008.1K	▼ -62.0%
Hotel	31.3%	▼ -40.1%	2,490.6K	▼ -9.6%	778.5K	▼ -60.4%
Short Term Rentals	56.2%	▼ -16.6%	408.6K	▼ -40.3%	229.6K	▼ -53.9%
Timeshare				▼ -100.0%		▼ -100.0%

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

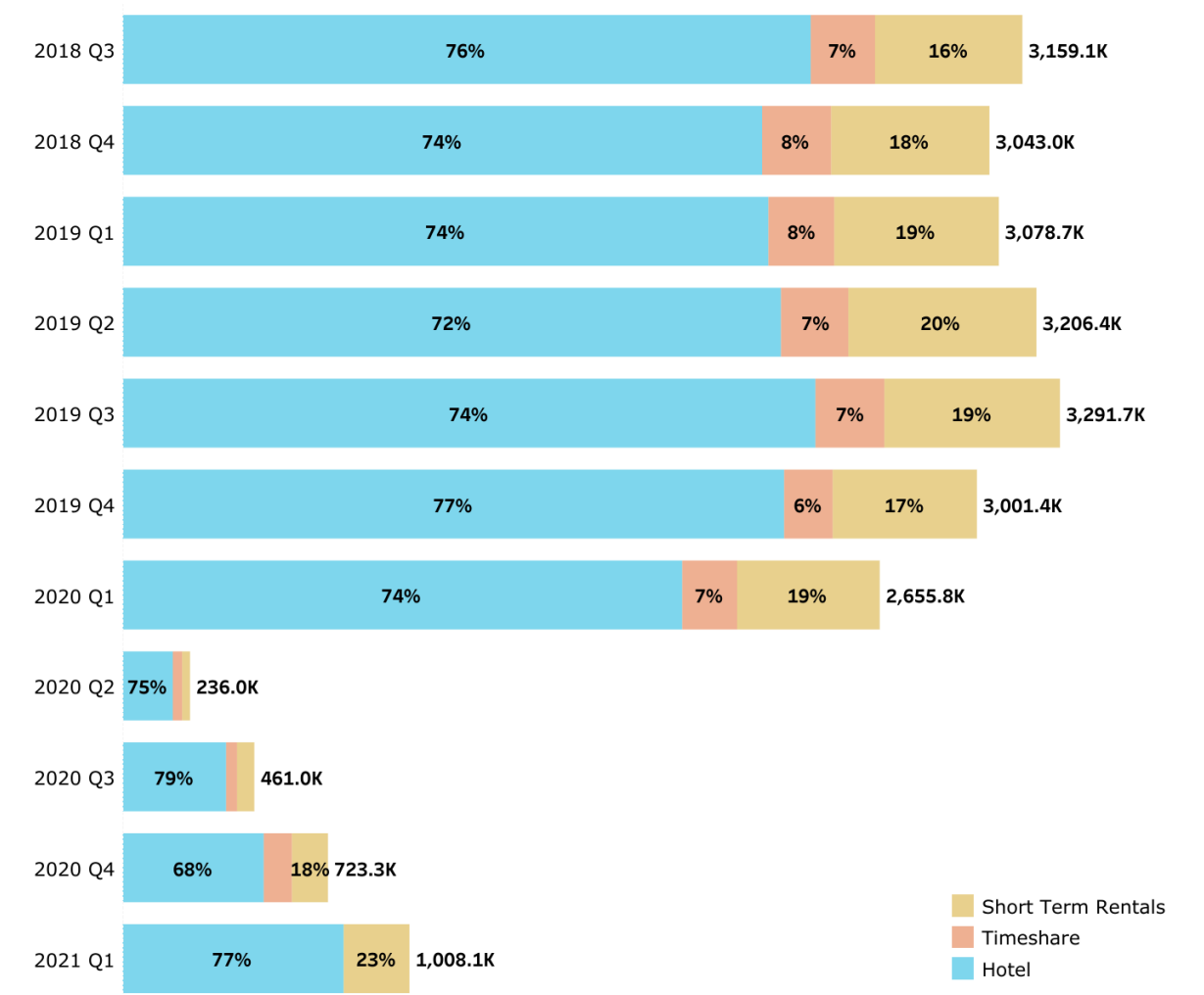
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

March 2021, Oahu



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
March 2021Island
Maui Island

Visitor Arrivals

Total Visitors & % change YOY, March 2021

170.8K ▲ 35.6%

Expenditure by Visitors

Total Expenditure & % change YOY, March 2021

\$330.1M ▲ 48.9%

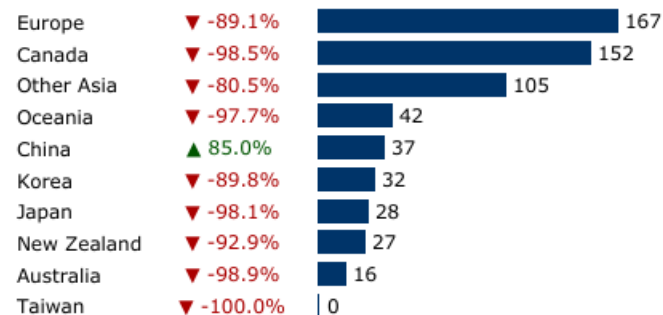
Avg. Length of Stay

All visitors, March 2021

8.9 Days

Visitors from International Markets

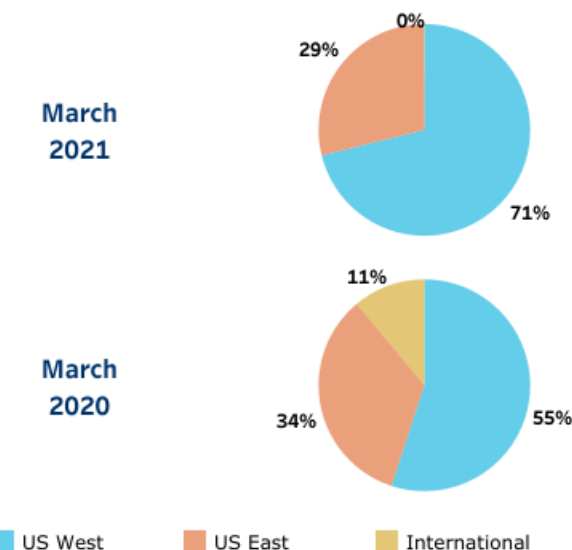
% change YOY & no of visitors



Source: HTA

Origin Market Share

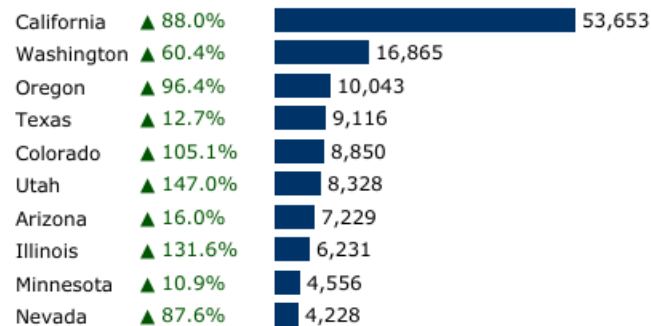
% share of visitor for March 2021



Source: HTA

Top 10 Domestic Markets

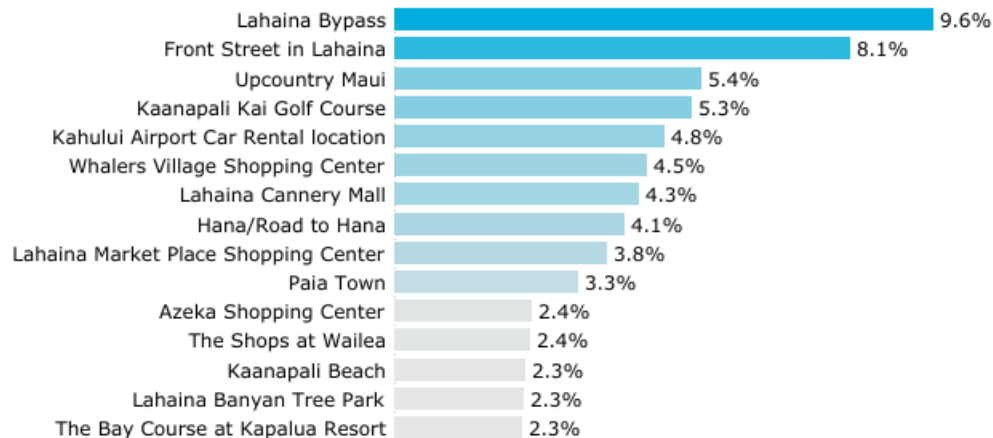
% change YOY & no of visitors



Source: HTA

Top POIs Visited by Visitors

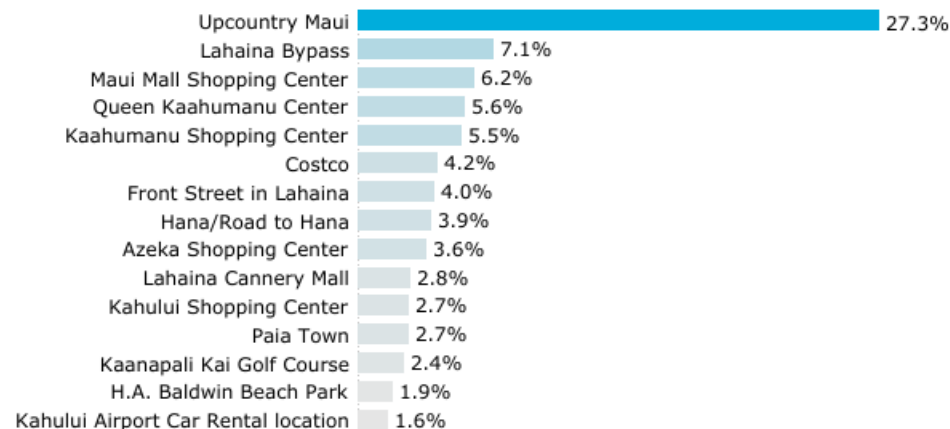
% share of visits, March 2021



Source: UM

Top POIs Visited by Residents

% share of visits, March 2021



Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Maui Island Visitation Insights for Visitors

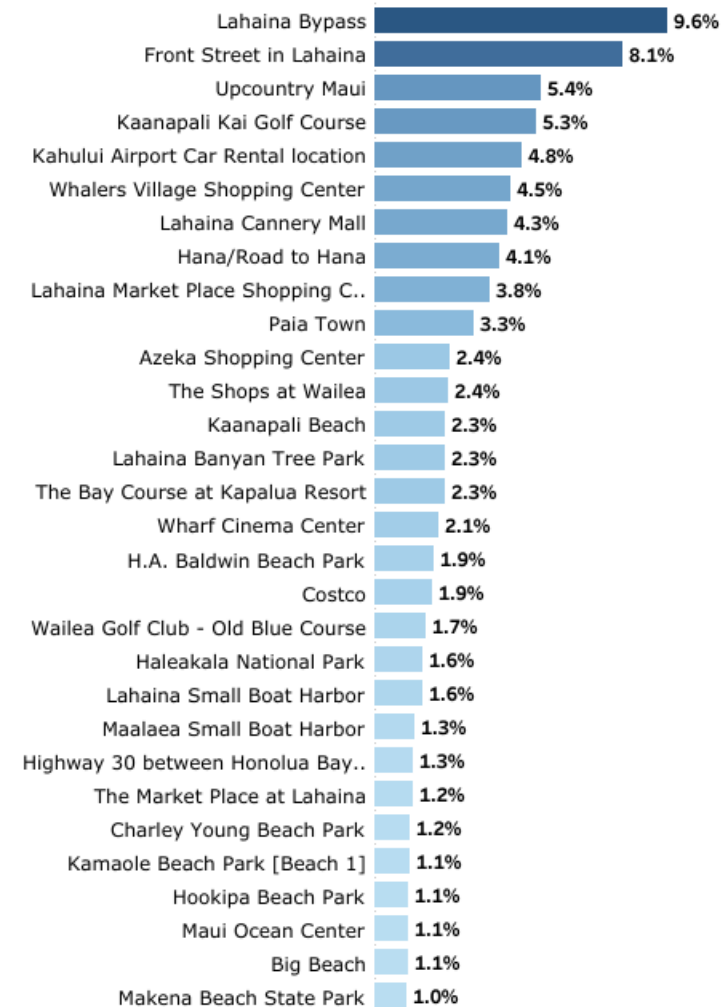
Date Range: 01-Mar-21 to 31-Mar-21

Island From Date To Date
Maui Island 01-Mar-21 31-Mar-21

Maui Island Top POIs Visited by Visitors

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits



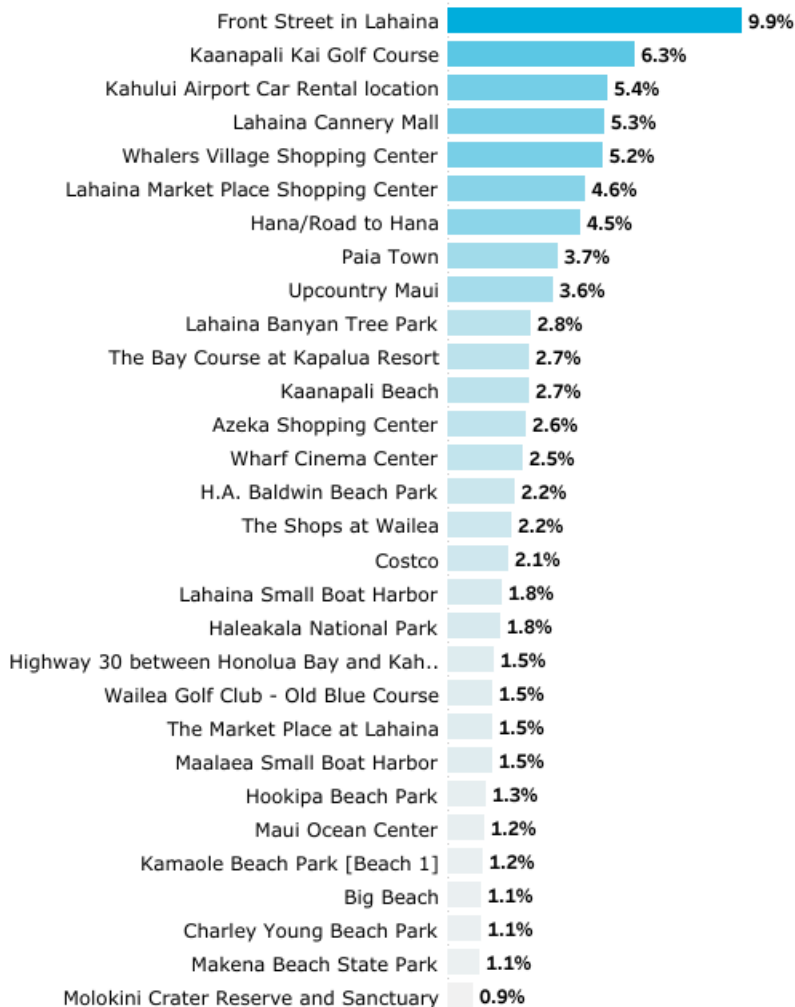
Source: UM

Sample Size: 12,237

Cross Visitation on Maui Island

POI: Lahaina Bypass

% share of visits

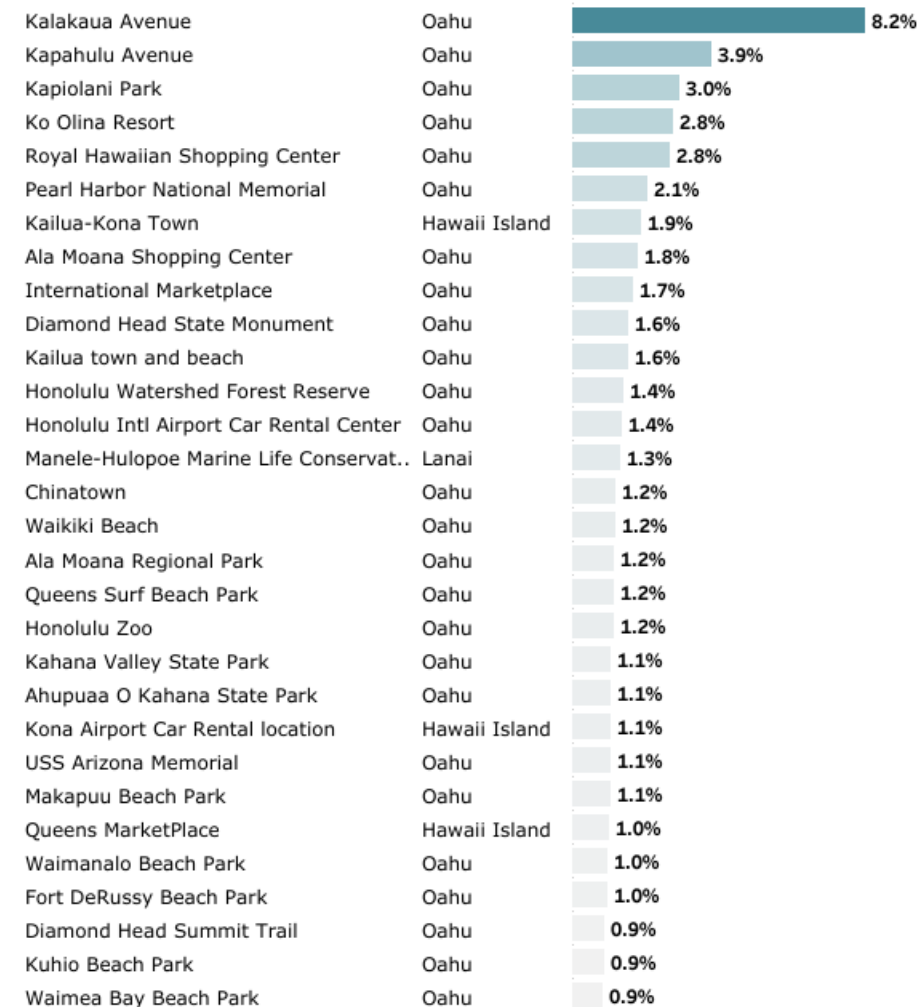


Source: UM

Cross Visitation on other Islands

POI: Lahaina Bypass

% share of visits



Source: UM

Maui Island Visitation Insights for Residents

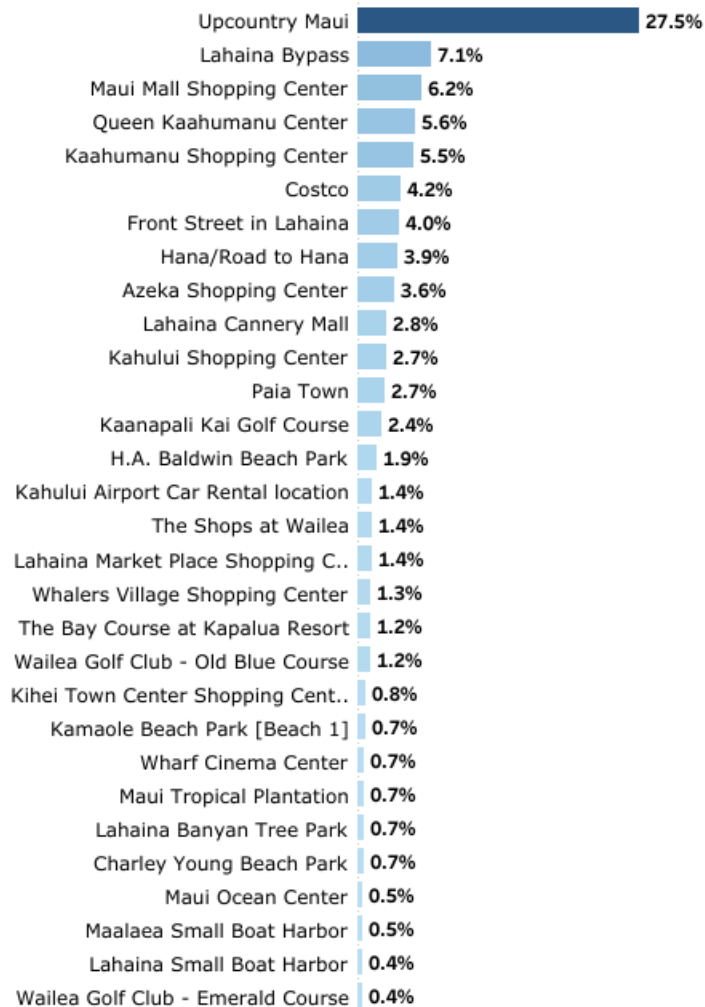
Date Range: 01-Mar-21 to 31-Mar-21

Island	Residence County	From Date	To Date
Maui Island	Maui, HI	01-Mar-21	31-Mar-21

Maui Island Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

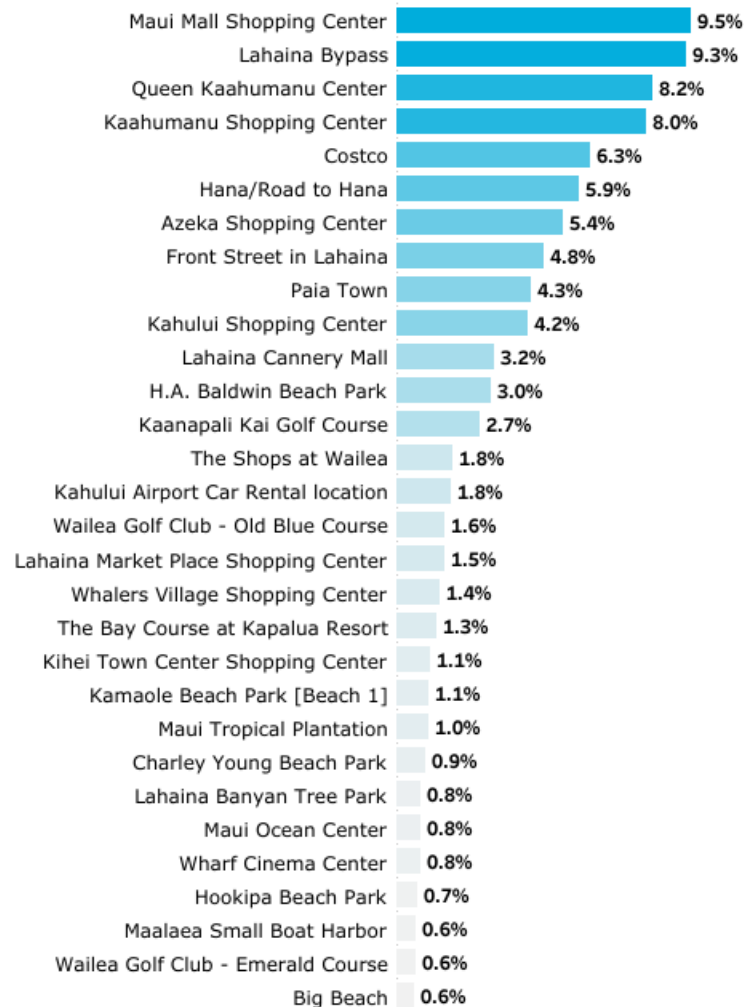


Source: UM

Cross Visitation on Maui Island

POI: Upcountry Maui

% share of visits

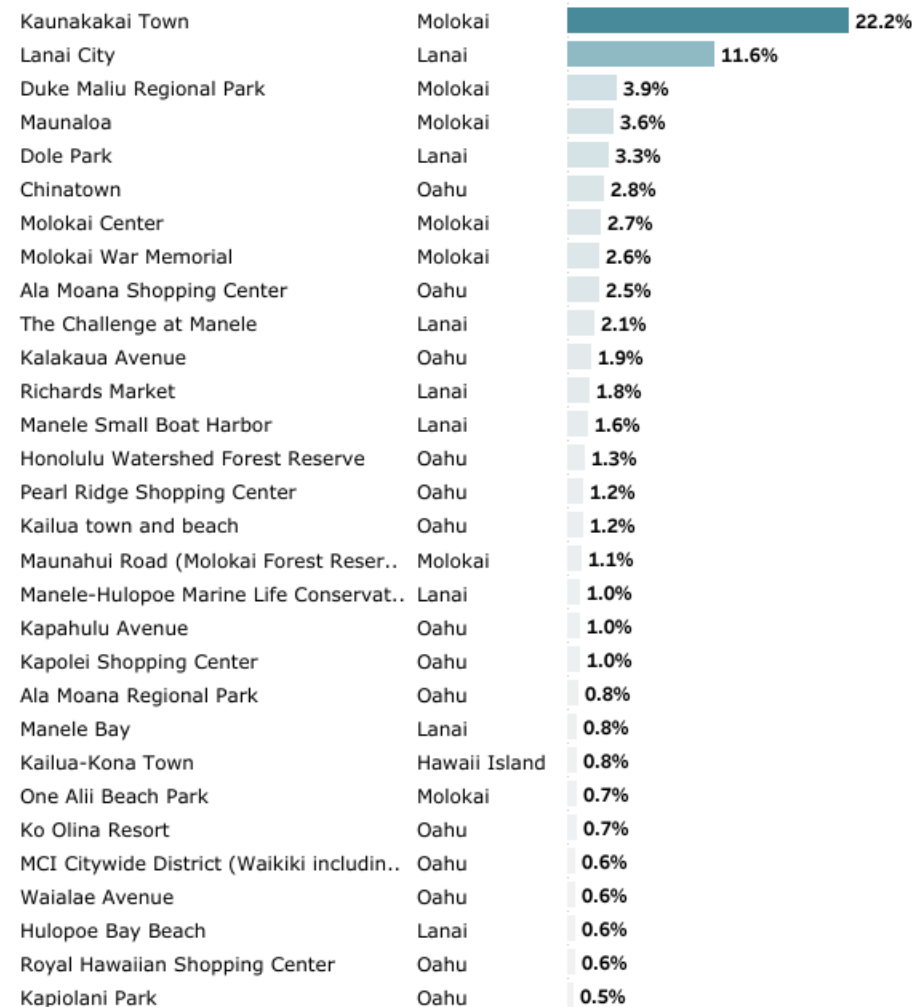


Source: UM

Cross Visitation on other Islands

POI: Upcountry Maui

% share of visits



Source: UM

Molokai Visitation Insights for Visitors

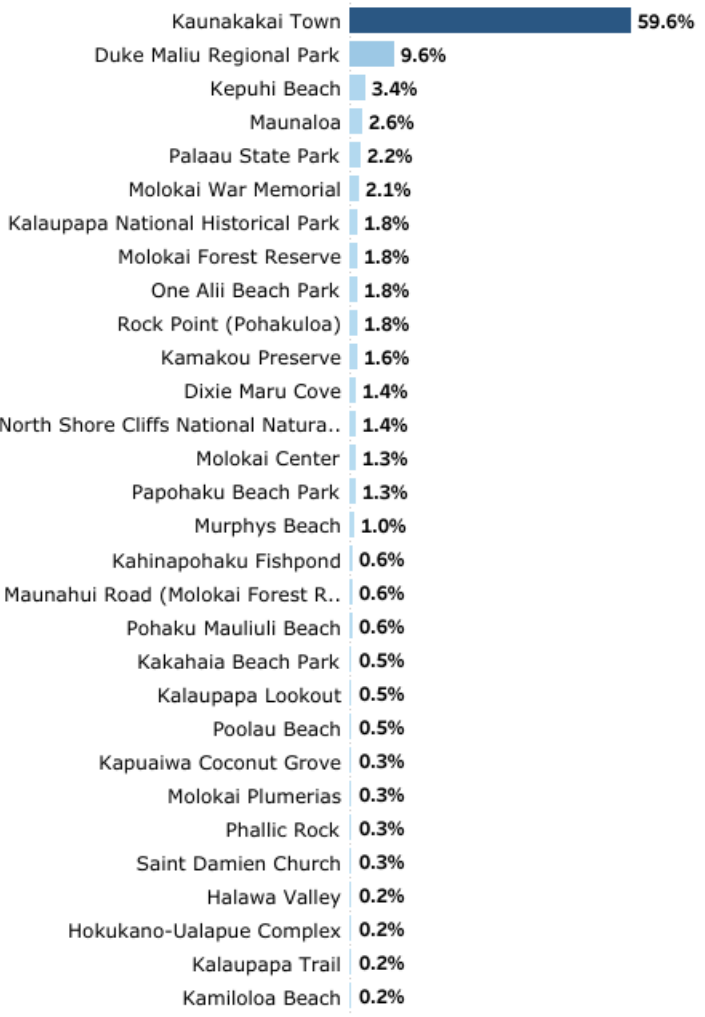
Date Range: 01-Mar-21 to 31-Mar-21

Island	From Date	To Date
Molokai	01-Mar-21	31-Mar-21

Molokai Top POIs Visited by Visitors

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

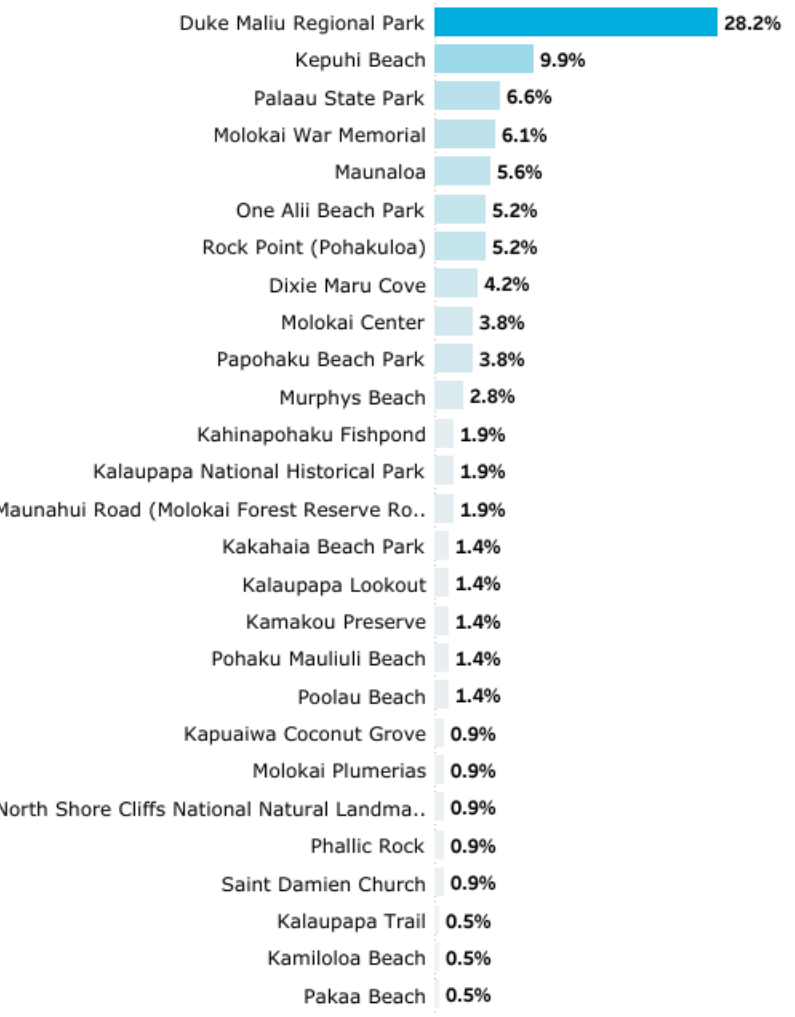


Source: UM

Cross Visitation on Molokai

POI: Kaunakakai Town

% share of visits

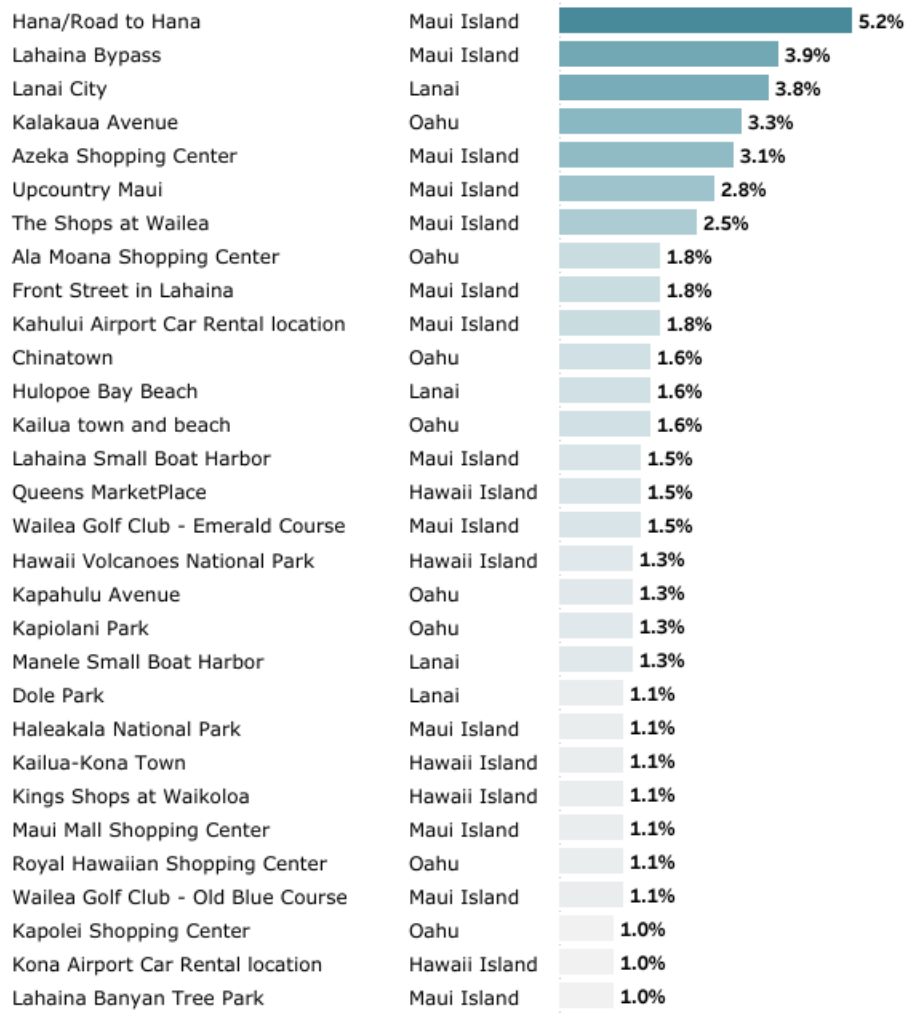


Source: UM

Cross Visitation on other Islands

POI: Kaunakakai Town

% share of visits



Source: UM

Molokai Visitation Insights for Residents

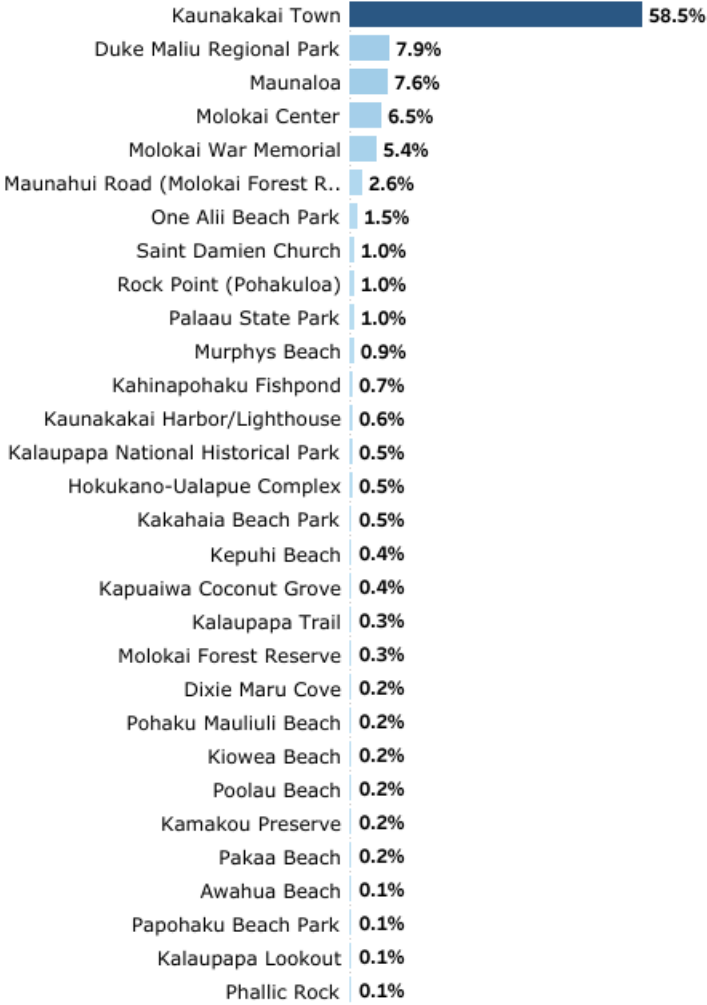
Date Range: 01-Mar-21 to 31-Mar-21

Island	Residence County	From Date	To Date
Molokai	Maui, HI	01-Mar-21	31-Mar-21

Molokai Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

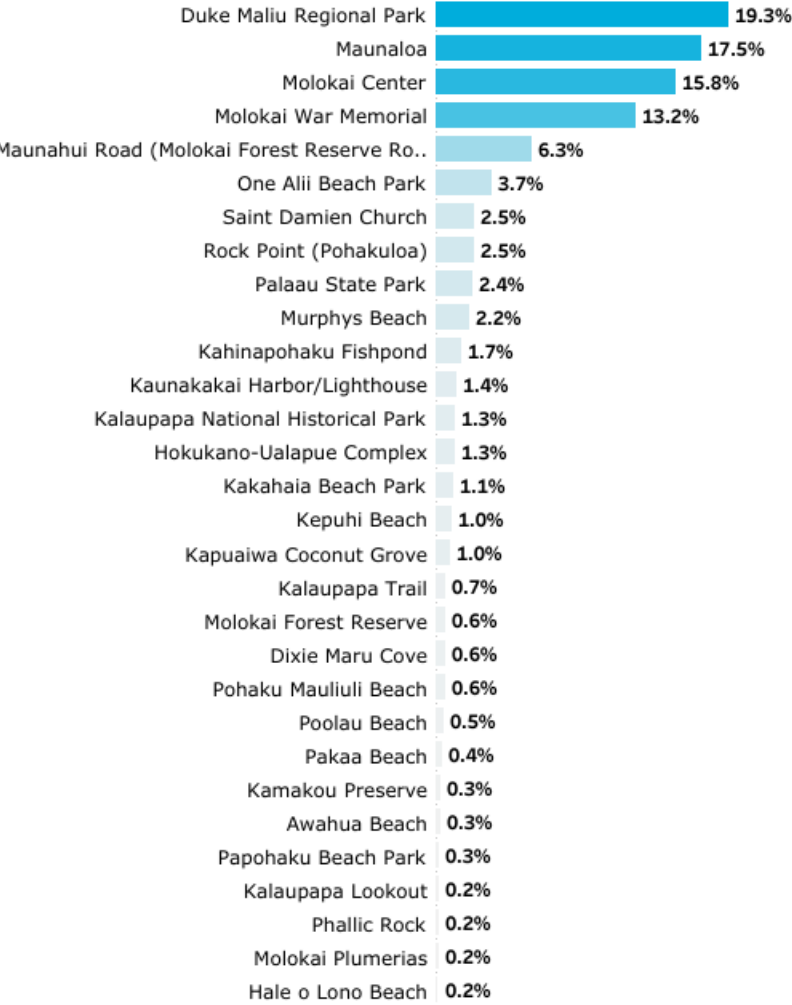


Source: UM

Cross Visitation on Molokai

POI: Kaunakakai Town

% share of visits

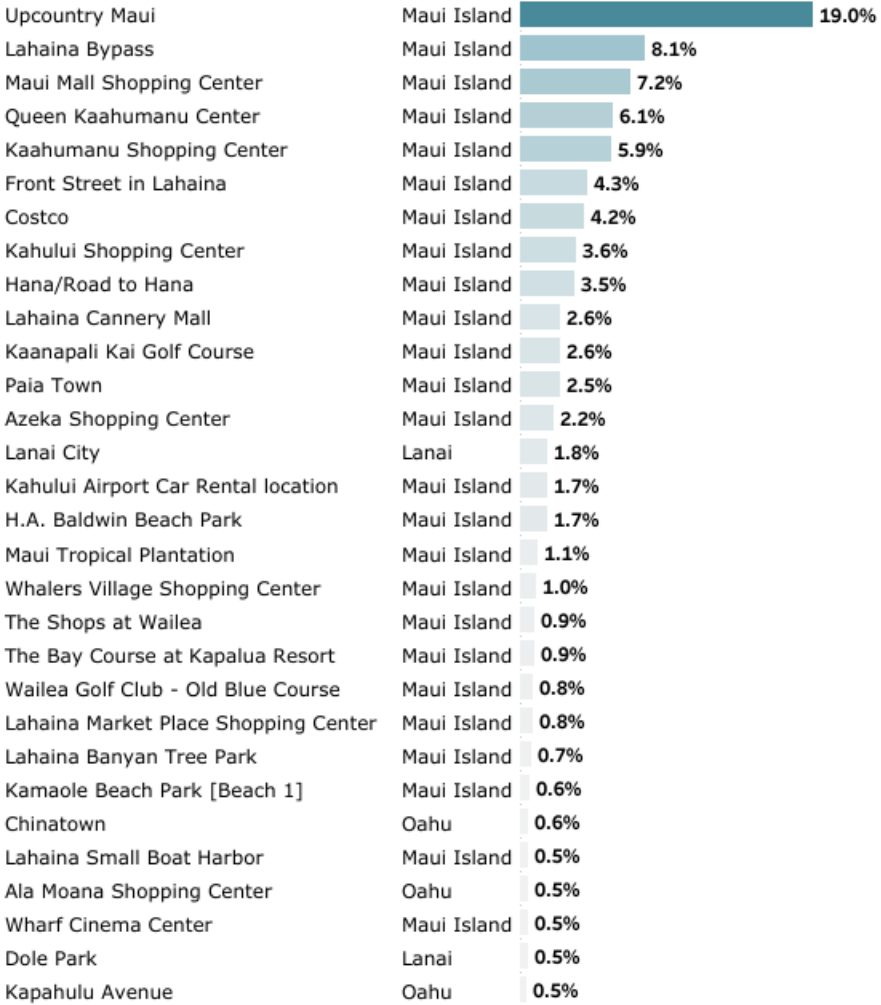


Source: UM

Cross Visitation on other Islands

POI: Kaunakakai Town

% share of visits



Source: UM

Island
Lanai

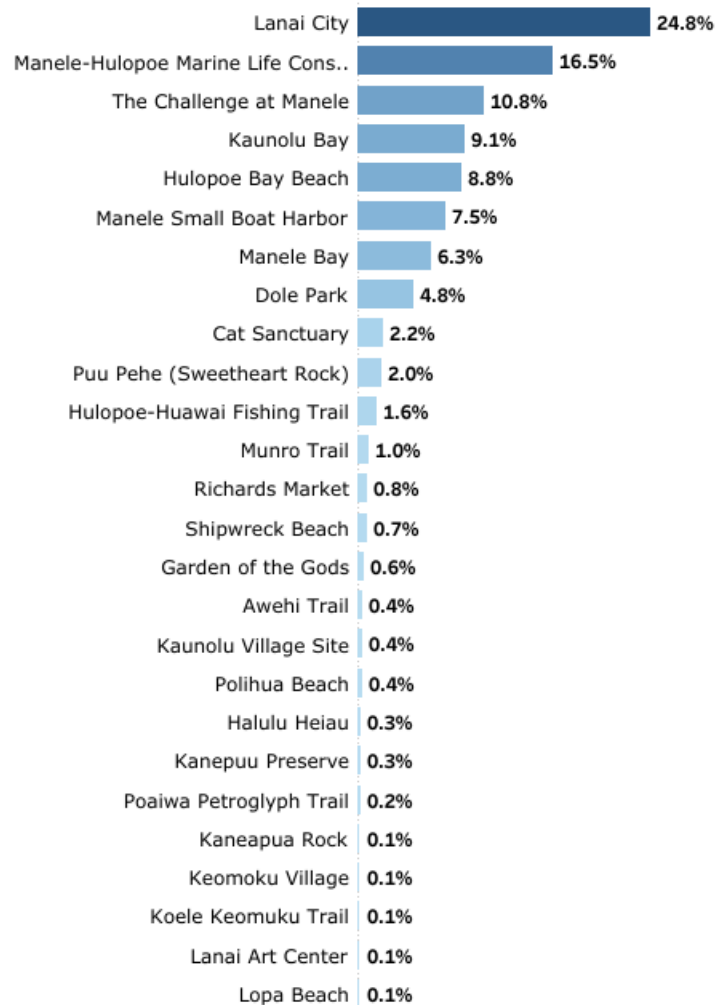
From Date
01-Mar-21

To Date
31-Mar-21

Lanai Top POIs Visited by Visitors

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

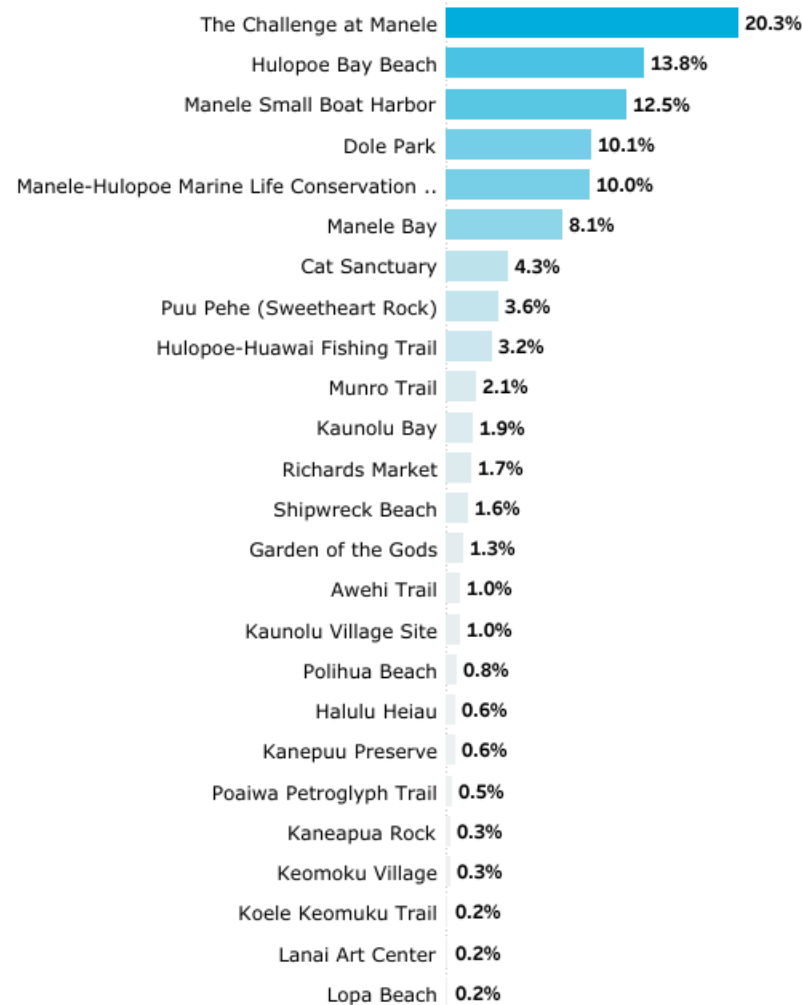


Source: UM

Cross Visitation on Lanai

POI: Lanai City

% share of visits

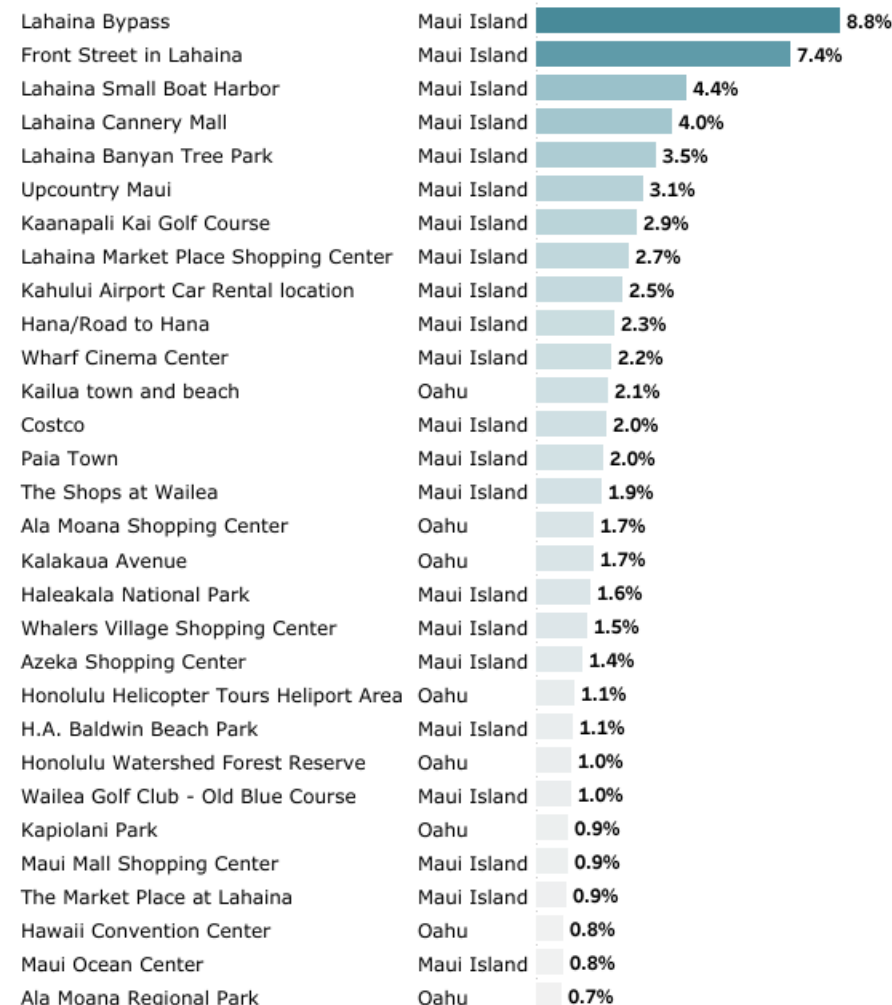


Source: UM

Cross Visitation on other Islands

POI: Lanai City

% share of visits



Source: UM

Lanai Visitation Insights for Residents

Date Range: 01-Mar-21 to 31-Mar-21

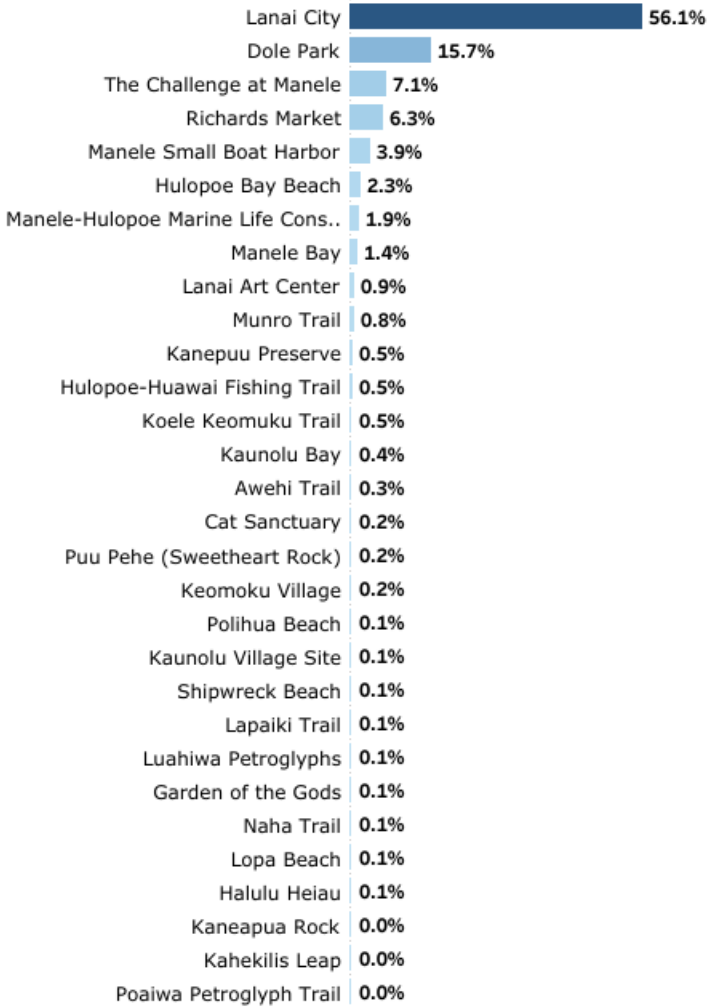


Island	Residence County	From Date	To Date
Lanai	Maui, HI	01-Mar-21	31-Mar-21

Lanai Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

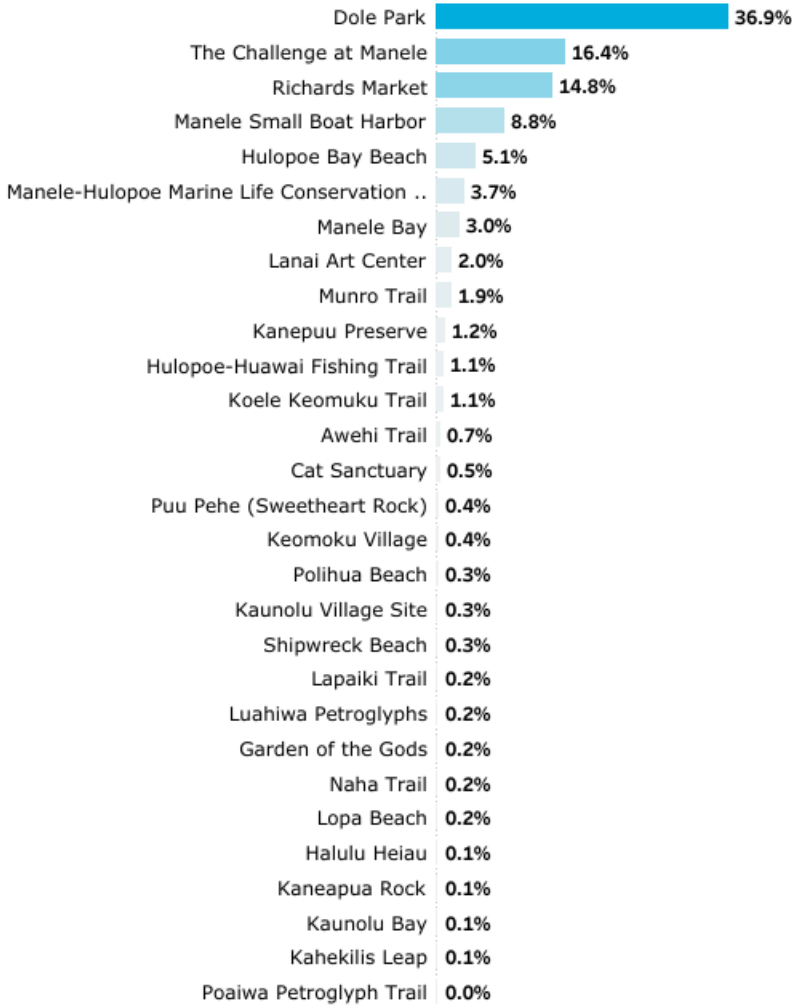


Source: UM

Cross Visitation on Lanai

POI: Lanai City

% share of visits

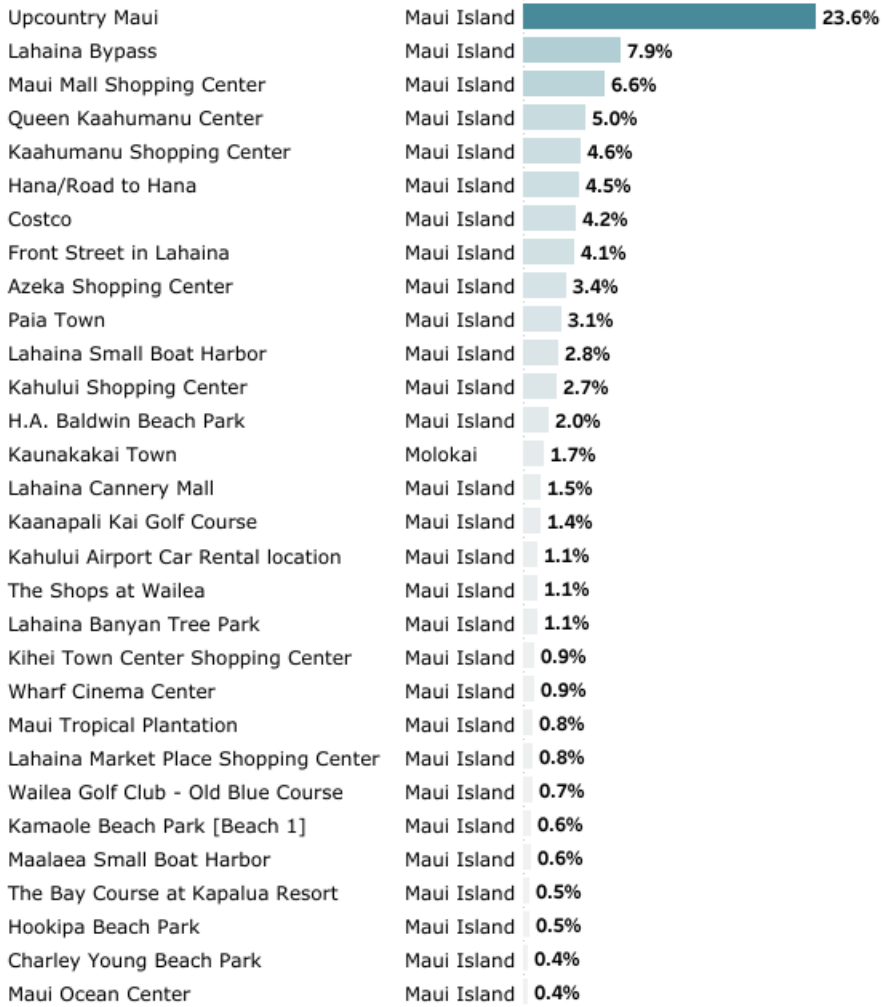


Source: UM

Cross Visitation on other Islands

POI: Lanai City

% share of visits



Source: UM

Maui County Lodging Summary

March 2021

Month
March 2021Island
Maui County

March 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	56.0%	▼ -7.8%	630.5K	▼ -34.7%	353.3K	▼ -42.6%
Hotel	49.0%	▲ 3.2%	392.8K	▼ -0.3%	192.5K	▲ 6.6%
Short Term Rentals	67.6%	▼ -2.0%	237.7K	▼ -17.2%	160.8K	▼ -19.6%
Timeshare						

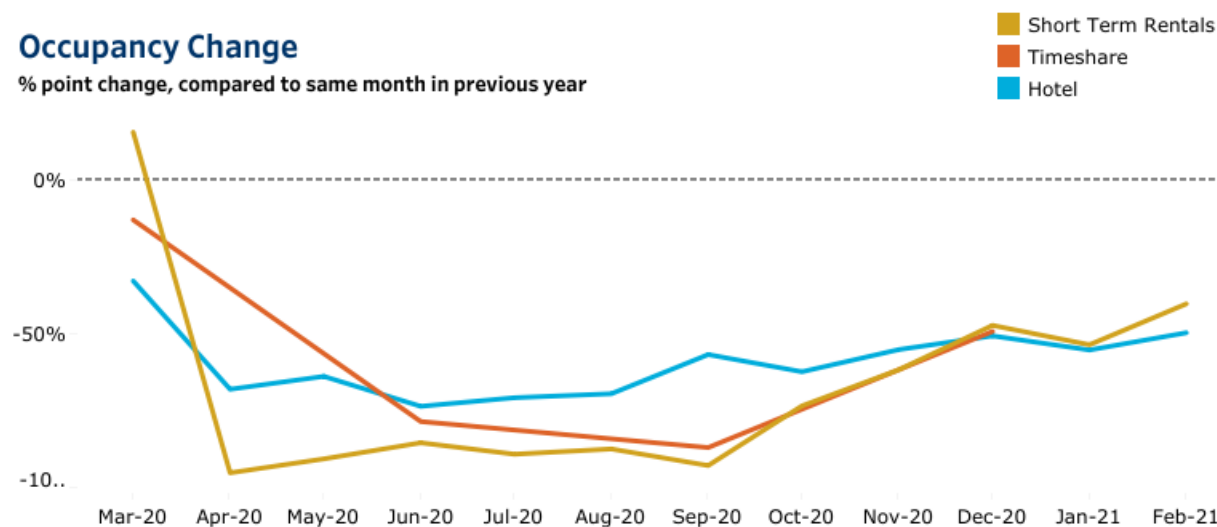
March 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	41.4%	▼ -32.6%	1,863.4K	▼ -15.7%	772.1K	▼ -52.8%
Hotel	34.3%	▼ -33.3%	1,140.5K	▼ -0.3%	390.9K	▼ -49.4%
Short Term Rentals	52.7%	▼ -27.6%	722.9K	▼ -7.7%	381.3K	▼ -39.4%
Timeshare				▼ -100.0%		▼ -100.0%

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

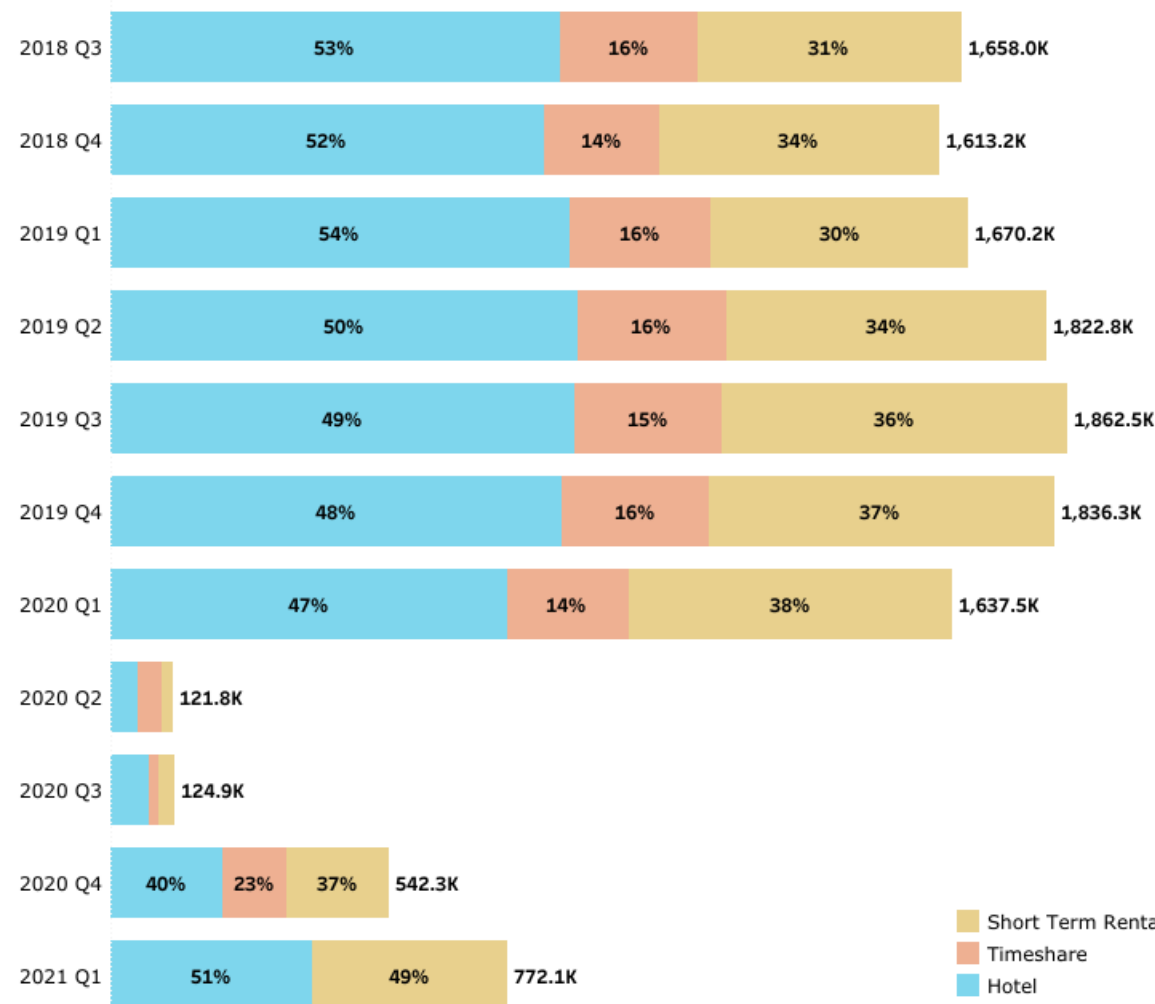
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

March 2021, Maui County



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
March 2021Island
Hawaii Island

Visitor Arrivals

Total Visitors & % change YOY, March 2021

82.7K ▲ 5.5%

Expenditure by Visitors

Total Expenditure & % change YOY, March 2021

\$129.6M ▲ 14.2%

Avg. Length of Stay

All visitors, March 2021

9.7 Days

Visitors from International Markets

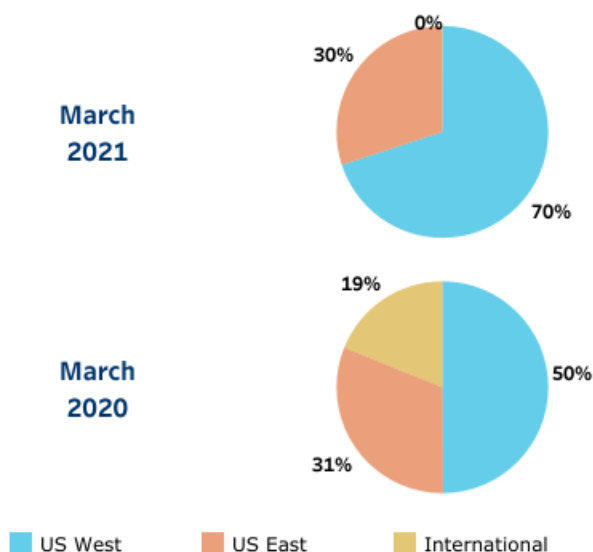
% change YOY & no of visitors

Europe	▼ -91.2%	123
Other Asia	▼ -84.6%	77
Canada	▼ -99.2%	60
Japan	▼ -99.4%	36
Oceania	▼ -97.2%	36
New Zealand	▼ -87.7%	32
Korea	▼ -92.0%	25
China	▼ -59.3%	24
Australia	▼ -99.6%	4
Taiwan	▼ -97.6%	2

Source: HTA

Origin Market Share

% share of visitor for March 2021

March
2021March
2020

Source: HTA

Top 10 Domestic Markets

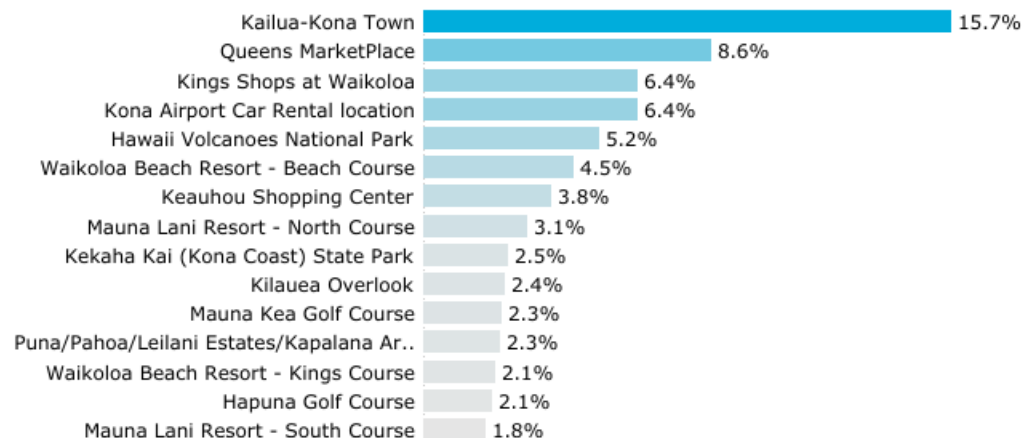
% change YOY & no of visitors

California	▲ 59.0%	23,970
Washington	▲ 45.3%	9,051
Oregon	▲ 75.9%	5,754
Colorado	▲ 72.6%	4,322
Texas	▼ -0.2%	4,043
Arizona	▲ 3.2%	3,027
Alaska	▲ 37.6%	2,792
Utah	▲ 94.9%	2,715
Illinois	▲ 133.6%	2,691
Minnesota	▼ -11.2%	1,965

Source: HTA

Top POIs Visited by Visitors

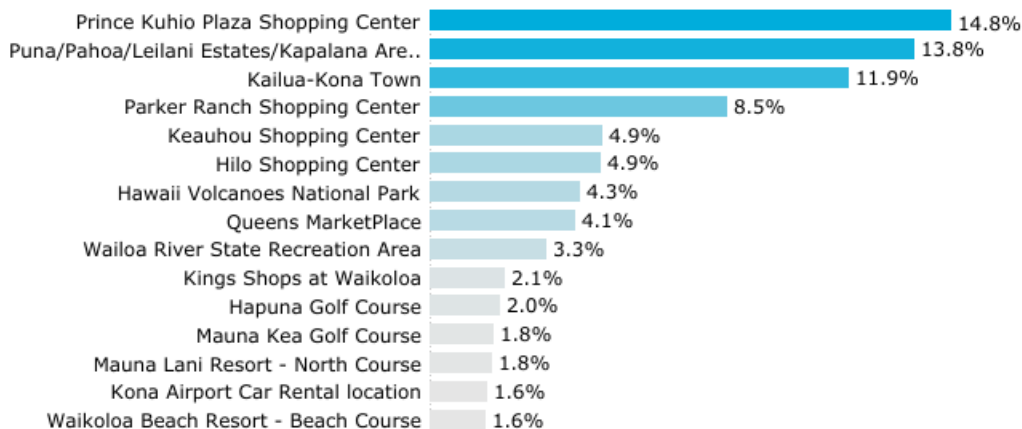
% share of visits, March 2021



Source: UH

Top POIs Visited by Residents

% share of visits, March 2021



Source: UH

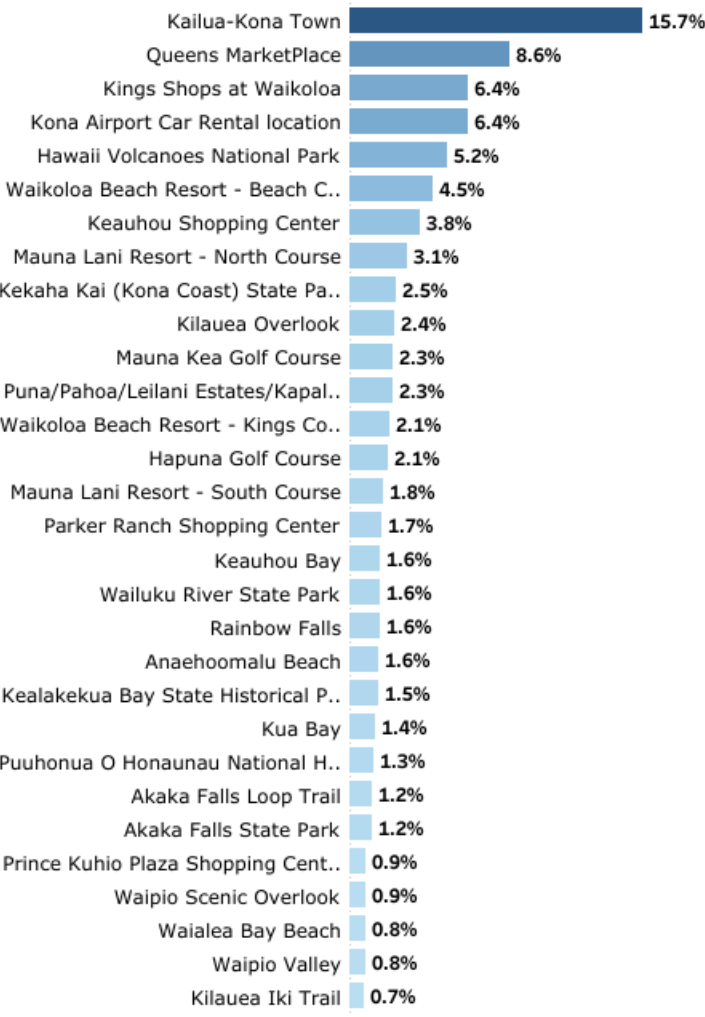
* Residents refer to residents of the State of Hawaii, all islands

Island	From Date	To Date
Hawaii Island	01-Mar-21	31-Mar-21

Hawaii Island Top POIs Visited by Visitors

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

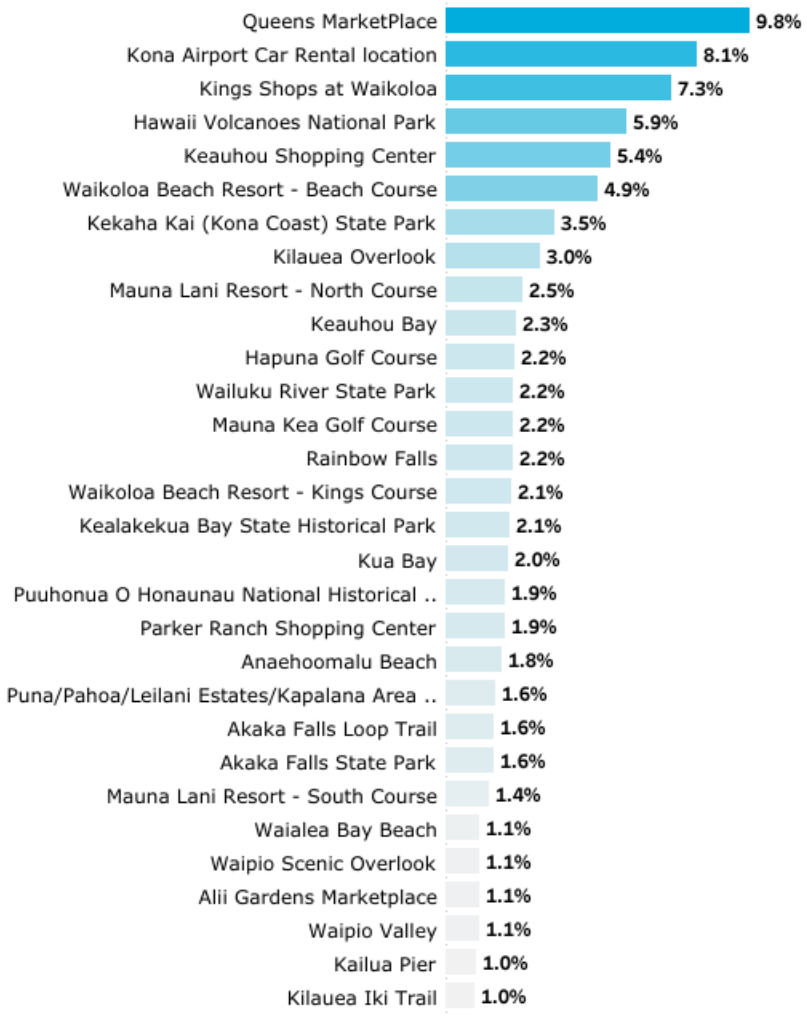


Source: UM

Cross Visitation on Hawaii Island

POI: Kailua-Kona Town

% share of visits

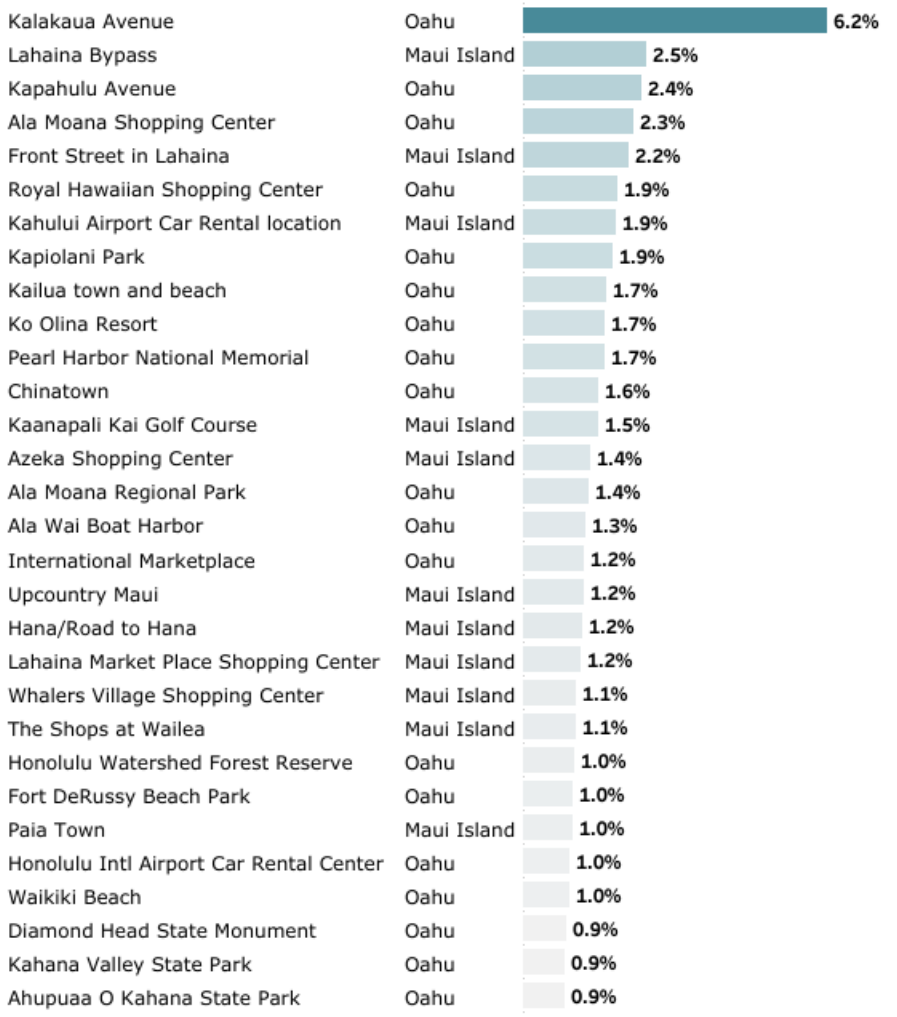


Source: UM

Cross Visitation on other Islands

POI: Kailua-Kona Town

% share of visits



Source: UM

Hawaii Island Visitation Insights for Residents

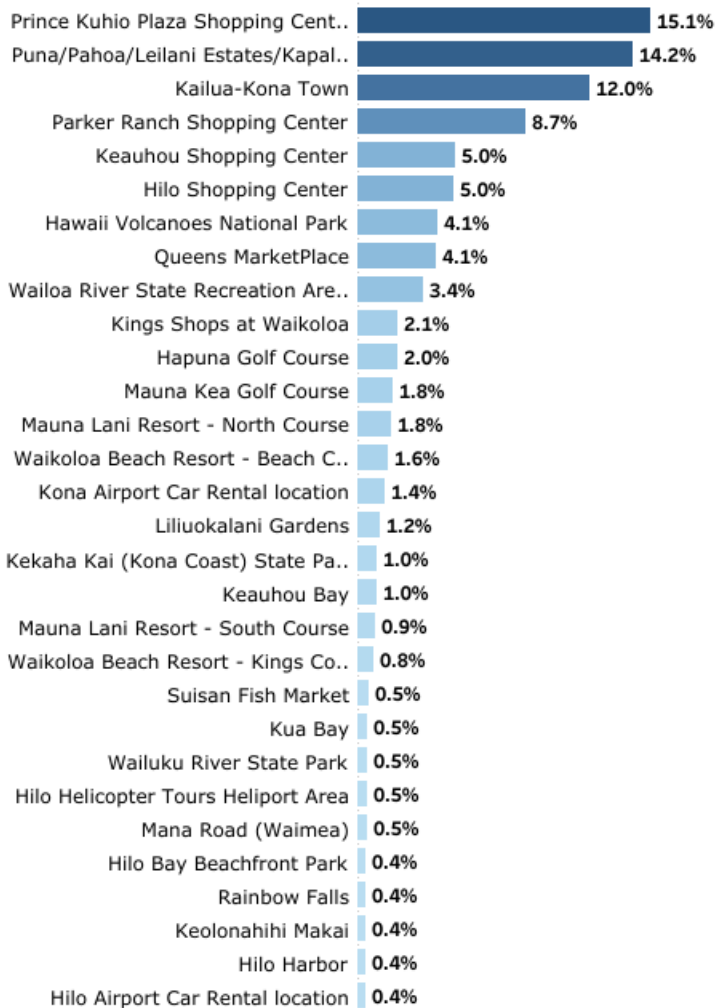
Date Range: 01-Mar-21 to 31-Mar-21

Island	Residence County	From Date	To Date
Hawaii Island	Hawaii, HI	01-Mar-21	31-Mar-21

Hawaii Island Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

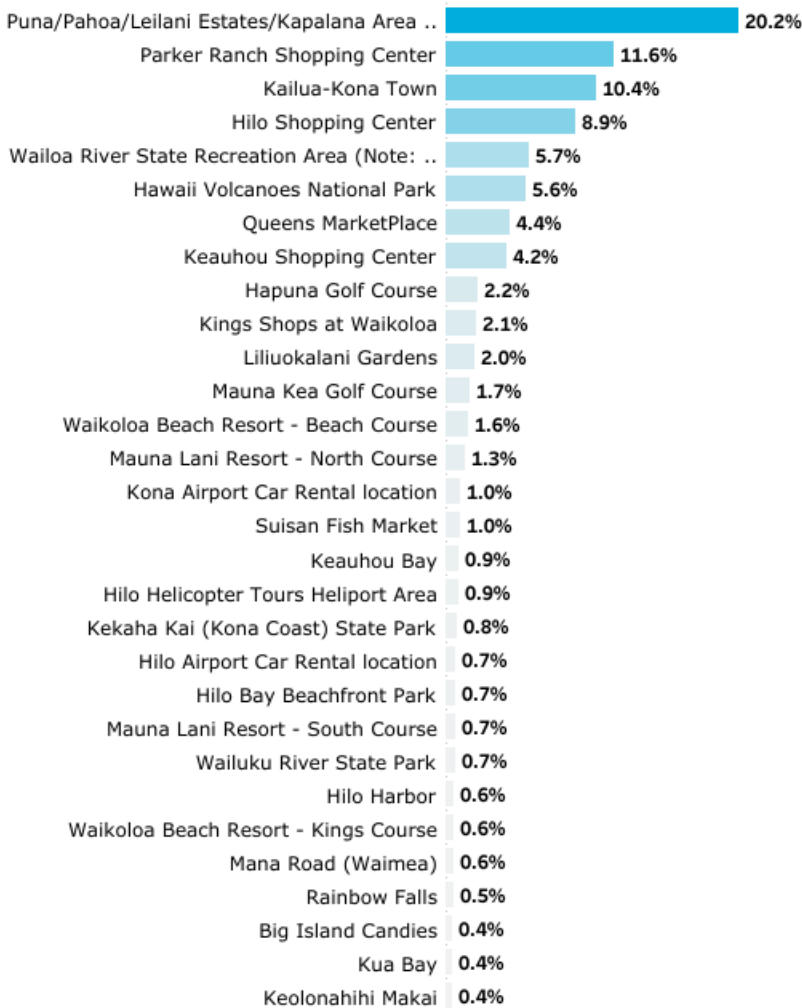


Source: UM

Cross Visitation on Hawaii Island

POI: Prince Kuhio Plaza Shopping Center

% share of visits

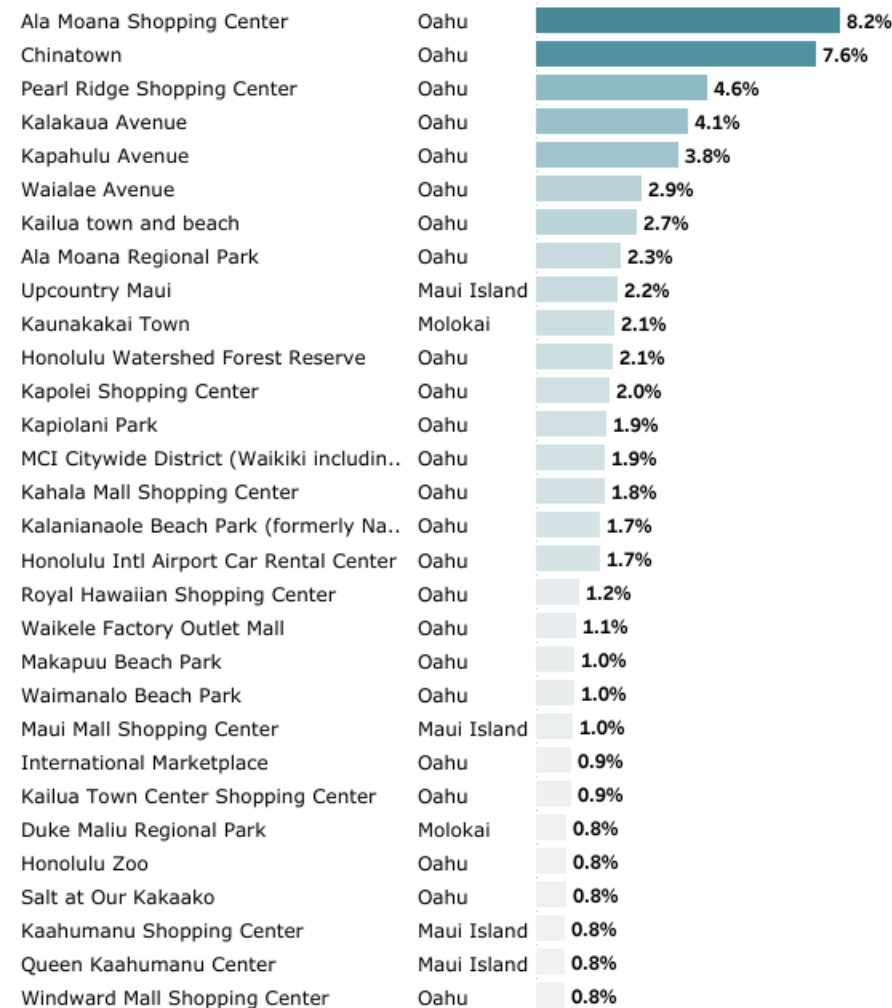


Source: UM

Cross Visitation on other Islands

POI: Prince Kuhio Plaza Shopping Center

% share of visits



Source: UM

Sample Size: 9,573

SYMPHONY TOURISM ECONOMICS

Month
March 2021

Island
Hawaii Island

March 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	57.6%	▼ -5.6%	329.0K	▼ -41.5%	189.3K	▼ -46.7%
Hotel	49.6%	▲ 3.5%	202.6K	▼ -2.2%	100.4K	▲ 5.3%
Short Term Rentals	70.3%	▲ 4.5%	126.4K	▼ -37.7%	88.9K	▼ -33.5%
Timeshare						

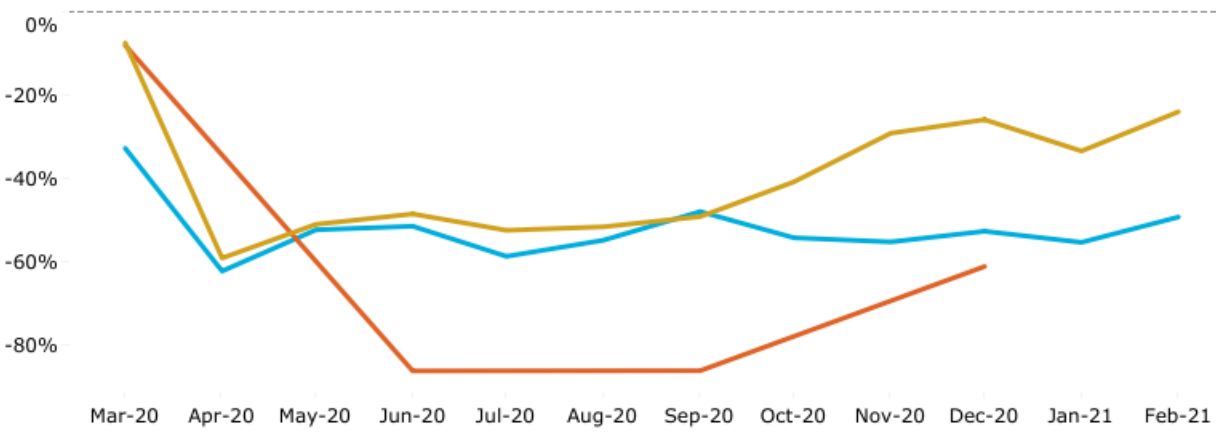
March 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	45.7%	▼ -28.8%	980.2K	▼ -25.9%	448.2K	▼ -54.6%
Hotel	37.2%	▼ -33.3%	596.7K	▼ -0.8%	222.2K	▼ -47.6%
Short Term Rentals	58.9%	▼ -17.7%	383.5K	▼ -32.7%	226.0K	▼ -48.2%
Timeshare				▼ -100.0%		▼ -100.0%

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

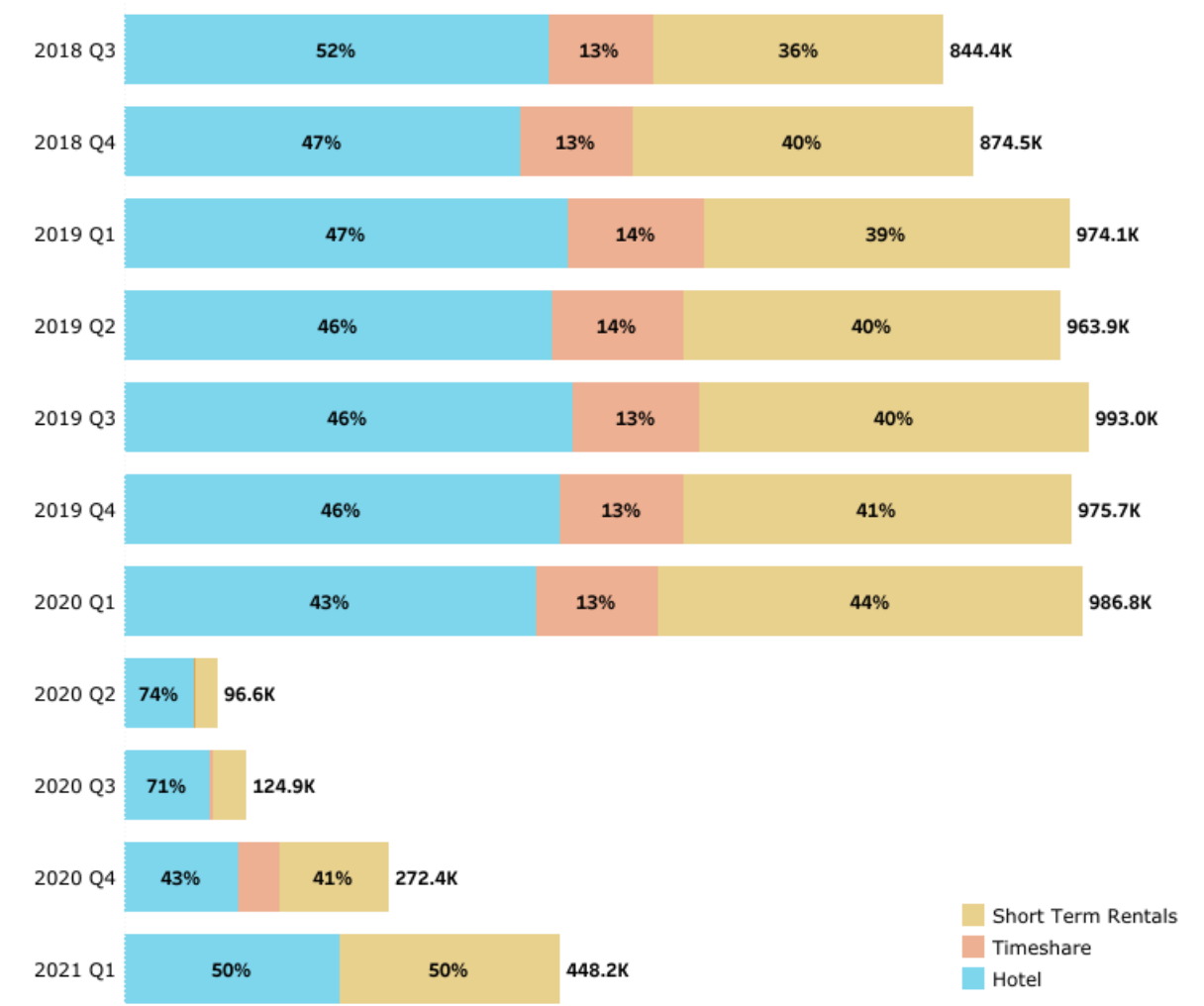
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

March 2021, Hawaii Island



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
March 2021

Island
Kauai

Visitor Arrivals

Total Visitors & % change YOY, March 2021

15.1K ▼ -73.4%

Expenditure by Visitors

Total Expenditure & % change YOY, March 2021

\$26.3M ▼ -66.7%

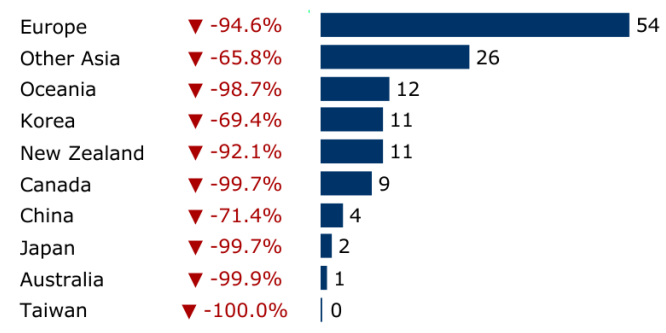
Avg. Length of Stay

All visitors, March 2021

10.4 Days

Visitors from International Markets

% change YOY & no of visitors

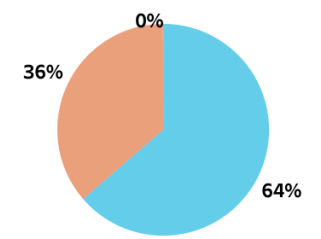


Source: HTA

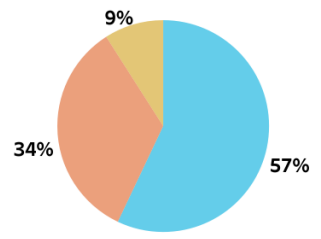
Origin Market Share

% share of visitor for March 2021

March 2021



March 2020

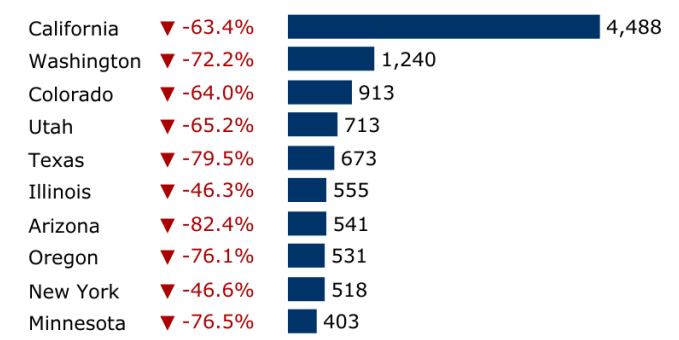


US West US East International

Source: HTA

Top 10 Domestic Markets

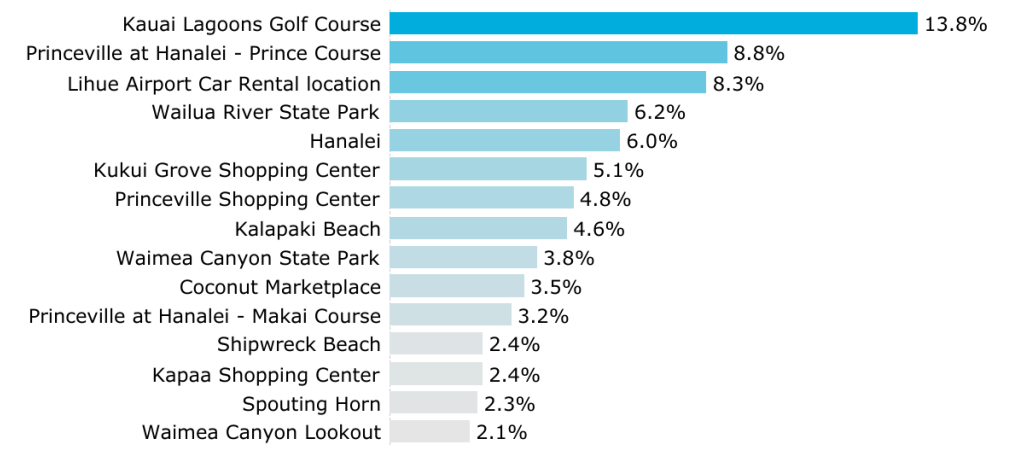
% change YOY & no of visitors



Source: HTA

Top POIs Visited by Visitors

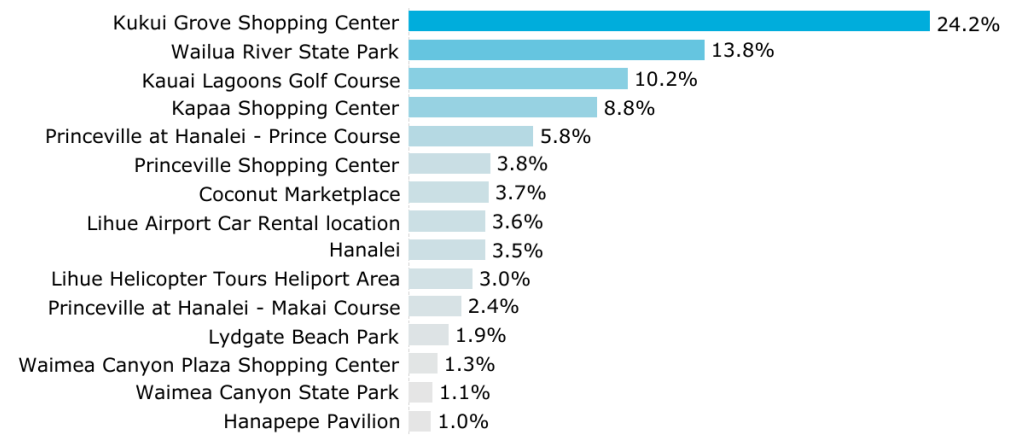
% share of visits, March 2021



Source: UM

Top POIs Visited by Residents

% share of visits, March 2021



Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Kauai Visitation Insights for Visitors

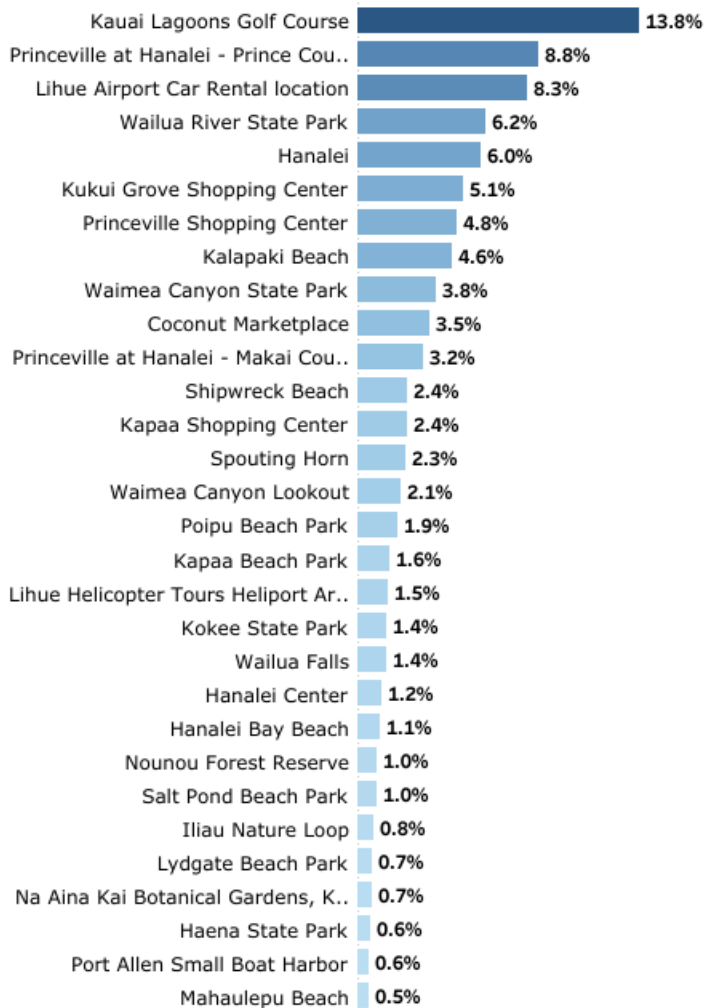
Date Range: 01-Mar-21 to 31-Mar-21

Island	From Date	To Date
Kauai	01-Mar-21	31-Mar-21

Kauai Top POIs Visited by Visitors

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits



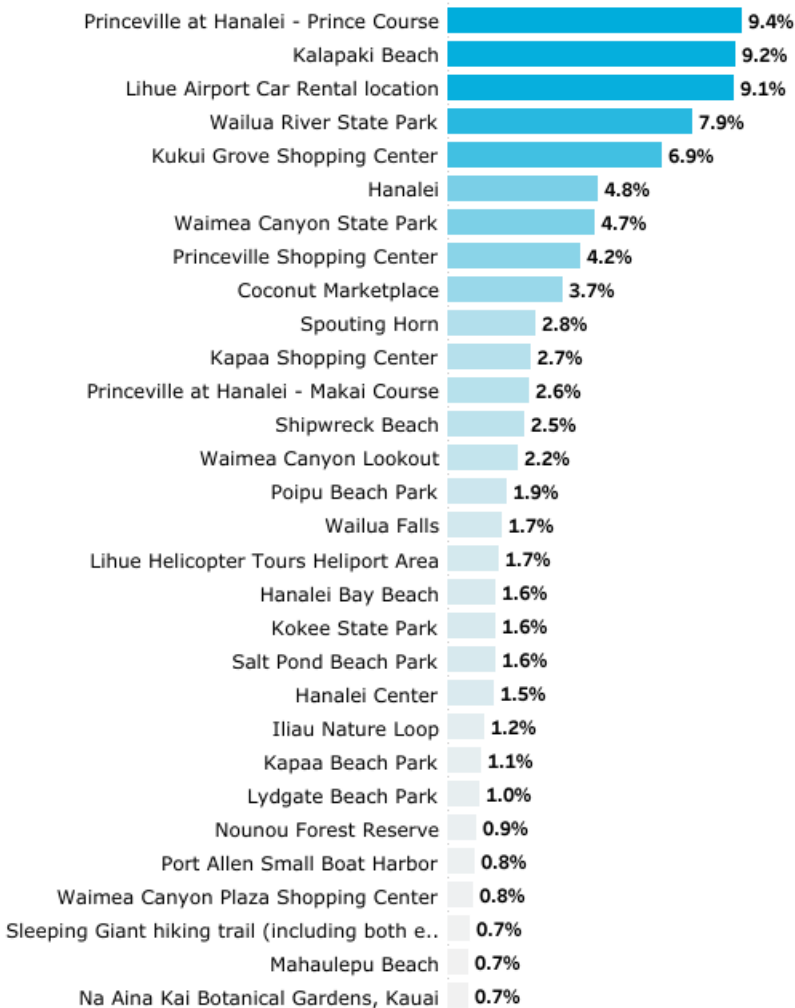
Source: UM

Sample Size: 873

Cross Visitation on Kauai

POI: Kauai Lagoons Golf Course

% share of visits

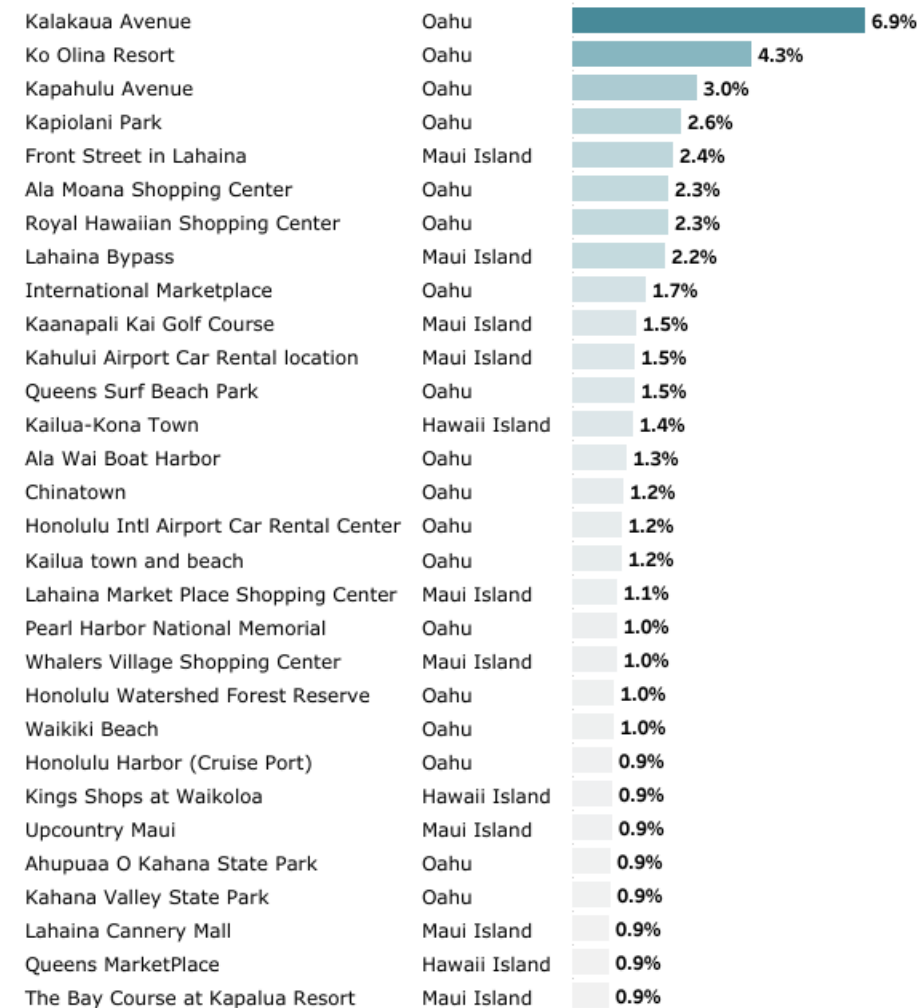


Source: UM

Cross Visitation on other Islands

POI: Kauai Lagoons Golf Course

% share of visits



Source: UM

Kauai Visitation Insights for Residents

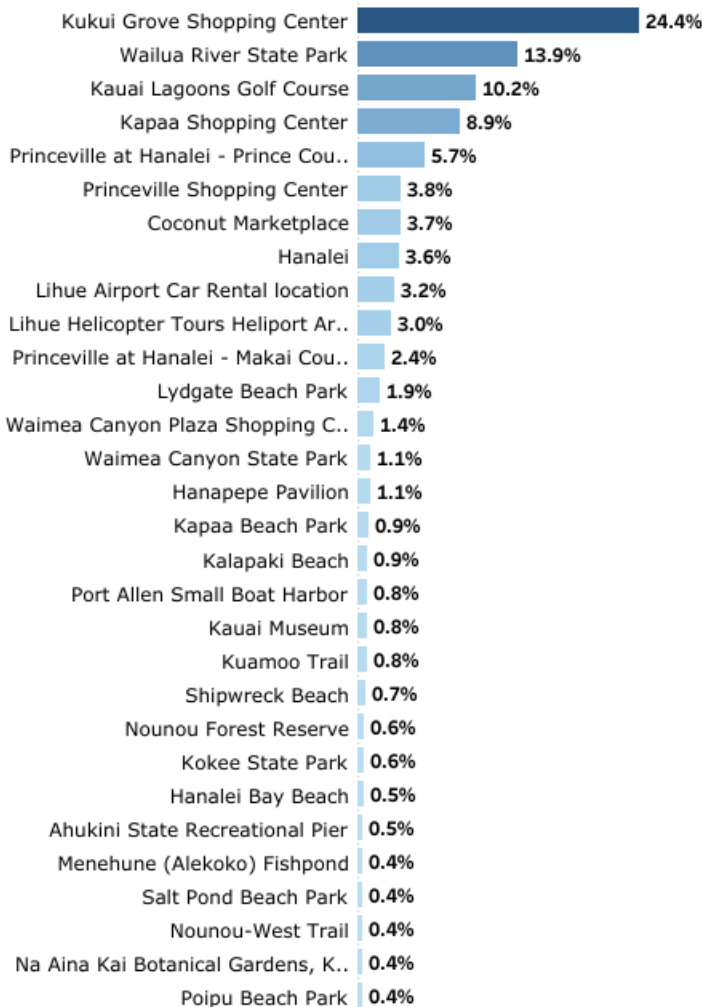
Date Range: 01-Mar-21 to 31-Mar-21

Island	Residence County	From Date	To Date
Kauai	Kauai, HI	01-Mar-21	31-Mar-21

Kauai Top POIs Visited by Residents

Date Range: 01-Mar-21 to 31-Mar-21

% share of visits

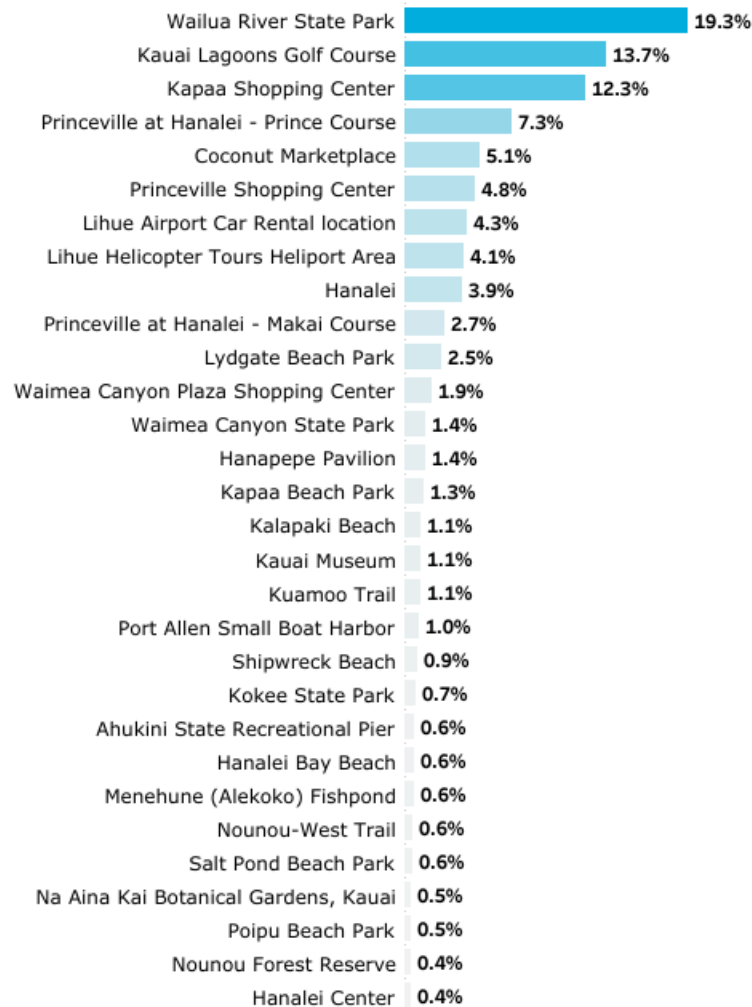


Source: UM

Cross Visitation on Kauai

POI: Kukui Grove Shopping Center

% share of visits

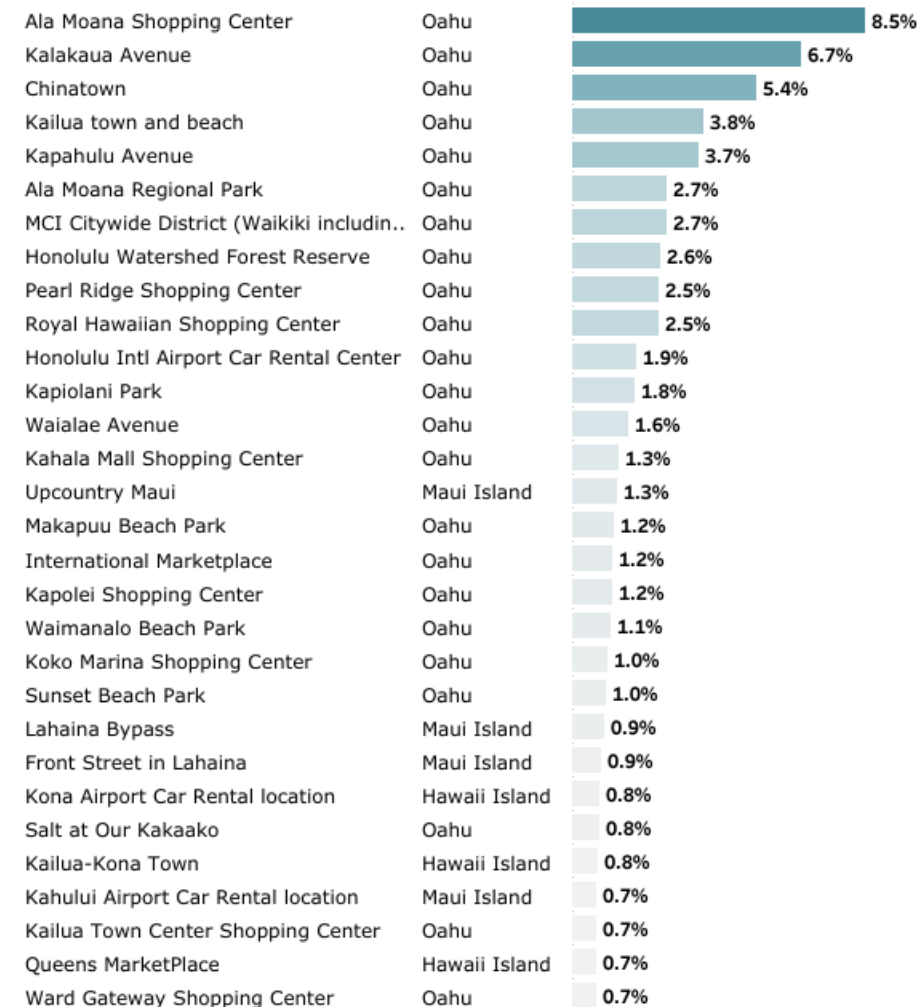


Source: UM

Cross Visitation on other Islands

POI: Kukui Grove Shopping Center

% share of visits



Source: UM

Month
March 2021

Island
Kauai

March 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	30.3%	▼ -34.6%	191.2K	▼ -58.7%	57.8K	▼ -80.7%
Hotel	30.9%	▼ -14.3%	100.6K	▼ -22.9%	31.1K	▼ -47.3%
Short Term Rentals	29.6%	▼ -30.0%	90.6K	▼ -33.0%	26.8K	▼ -66.8%
Timeshare						

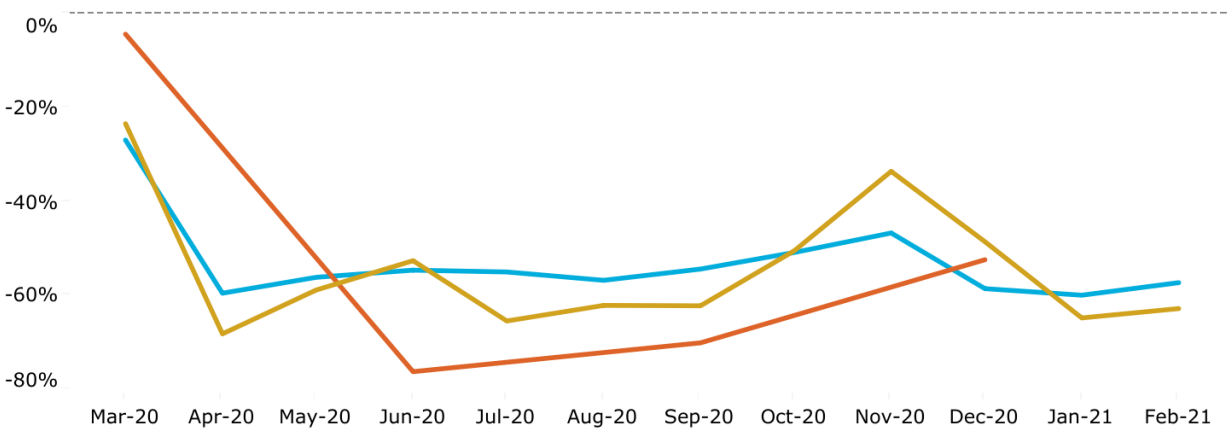
March 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	23.3%	▼ -49.9%	573.0K	▼ -38.7%	133.3K	▼ -80.5%
Hotel	25.2%	▼ -43.5%	292.0K	▼ -22.9%	73.5K	▼ -71.7%
Short Term Rentals	21.3%	▼ -52.0%	281.0K	▼ -21.8%	59.8K	▼ -77.3%
Timeshare				▼ -100.0%		▼ -100.0%

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

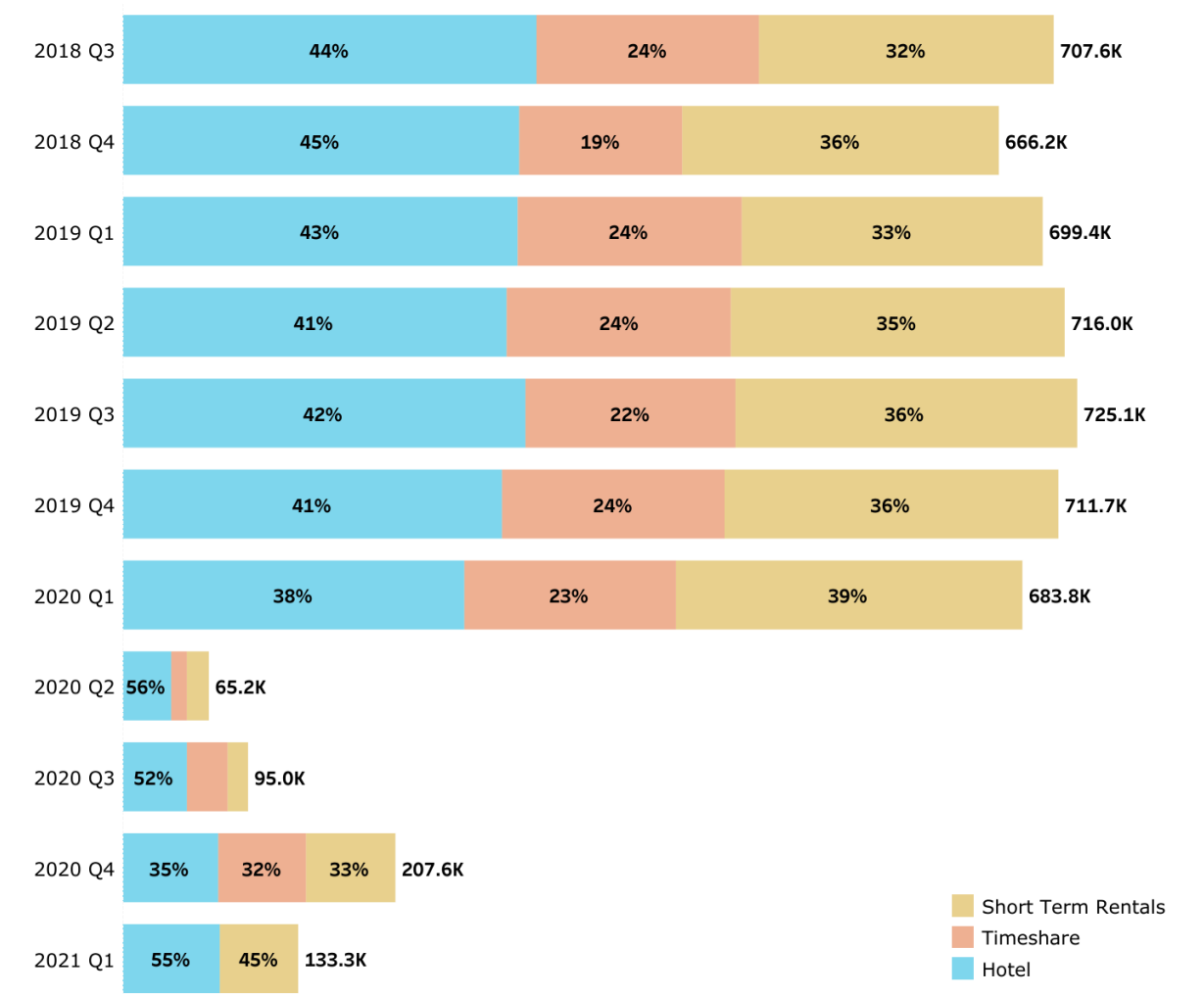
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

March 2021, Kauai



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA