

HTA REGULAR BOARD MEETING

Thursday, September 2, 2021

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

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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

July 2021 Highlights

EXPENDITURES (\$mil.)	2021P	2020P	2019
TOTAL (AIR)	1,580.7	N/A	1,695.2
U.S. Total	1,519.8	N/A	1,180.5
U.S. West	961.0	N/A	669.8
U.S. East	558.8	N/A	510.7
Japan	11.2	N/A	186.5
Canada	44.1	N/A	50.1

PPPD SPENDING (\$)	2021P	2020P	2019
TOTAL (AIR)	192.1	N/A	190.9
U.S. Total	192.7	N/A	184.0
U.S. West	185.7	N/A	165.2
U.S. East	206.0	N/A	216.4
Japan	220.2	N/A	233.7
Canada	177.4	N/A	157.9

VISITOR ARRIVALS	2021P	2020P	2019
TOTAL (AIR)	879,551	22,562	995,210
U.S. Total	851,450	20,406	706,174
U.S. West	578,629	12,890	462,676
U.S. East	272,821	7,516	243,498
Japan	2,817	54	134,587
Canada	1,999	94	26,939

AVERAGE DAILY CENSUS	2021P	2020P	2019
TOTAL (AIR)	265,392	17,970	286,419
U.S. Total	254,478	16,211	206,916
U.S. West	166,976	9,545	130,793
U.S. East	87,502	6,666	76,123
Japan	1,645	70	25,740
Canada	1,008	107	10,226

Note: 2020 and 2021 figures are preliminary.

July 2021 Highlights

EXPENDITURES (\$mil.)	2021P	2020P	2019
O'ahu	666.3	N/A	749.4
Maui	487.9	N/A	506.0
Moloka'i	2.4	N/A	2.9
Lāna'i	14.3	N/A	14.3
Kaua'i	189.5	N/A	201.3
Hawai'i Island	220.3	N/A	221.3

PPPD SPENDING (\$)	2021P	2020P	2019
O'ahu	187.8	N/A	178.5
Maui	206.6	N/A	213.1
Moloka'i	134.7	N/A	119.8
Lāna'i	518.0	N/A	554.6
Kaua'i	193.3	N/A	194.8
Hawai'i Island	170.5	N/A	181.0

VISITOR ARRIVALS	2021P	2020P	2019
O'ahu	453,654	15,776	598,986
Maui	282,715	2,585	307,834
Moloka'i	3,202	224	6,665
Lāna'i	6,042	121	9,190
Kaua'i	115,946	1,397	139,157
Hawai'i Island	149,372	3,700	173,899

AVERAGE DAILY CENSUS	2021P	2020P	2019
O'ahu	114,424	10,940	135,456
Maui	76,195	2,029	76,577
Moloka'i	584	119	781
Lāna'i	891	44	829
Kaua'i	31,628	1,333	33,336
Hawai'i Island	41,670	3,506	39,439

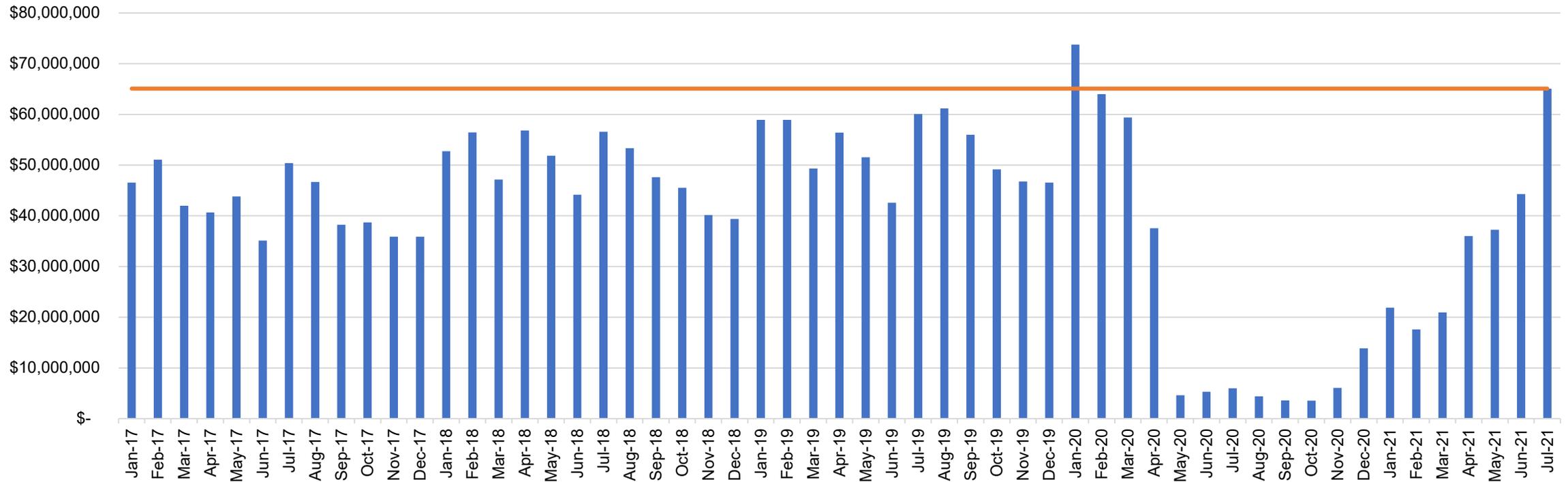
Note: 2020 and 2021 figures are preliminary.

Air Visitor Arrival Recovery From Same Month in 2019 (%)

Island	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
State	21.3	30.8	48.0	58.7	75.3	83.6	88.4
Oahu	16.2	23.2	39.5	45.8	61.2	70.1	75.7
Kauai	3.8	7.0	12.3	39.5	65.1	77.4	83.3
Maui Island	28.7	41.8	62.8	71.8	85.5	88.1	91.8
Molokai	14.7	17.9	33.6	36.1	45.0	51.5	48.0
Lanai	14.8	25.8	28.9	62.7	65.3	55.6	65.7
Hawaii Island	23.3	33.6	51.3	62.9	74.2	83.6	85.9

July 2021 Highlights

- Preliminary July TAT Collections: \$64.1 million
- Preliminary Fiscal 22 YTD TAT Collections: \$64.1 million (+1,031%)
- Fiscal 21 YTD TAT Collections: \$5.7 million (+58.4 million)



Source: Department of Taxation

July 2021 Highlights

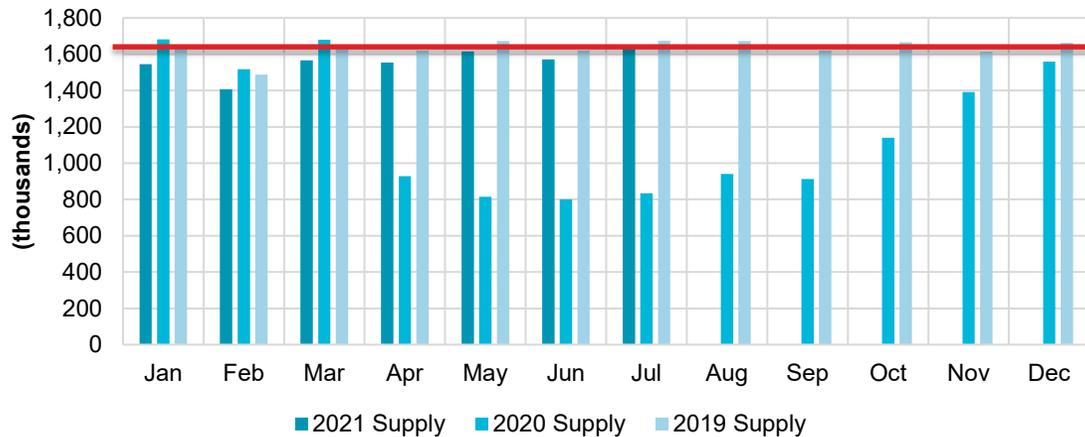
State of Hawai'i Hotel Performance

	2021	2020	2019
Occupancy	82.4%	22.3%	85.3%
ADR	\$368	\$166	\$304
RevPAR	\$303	\$37	\$259

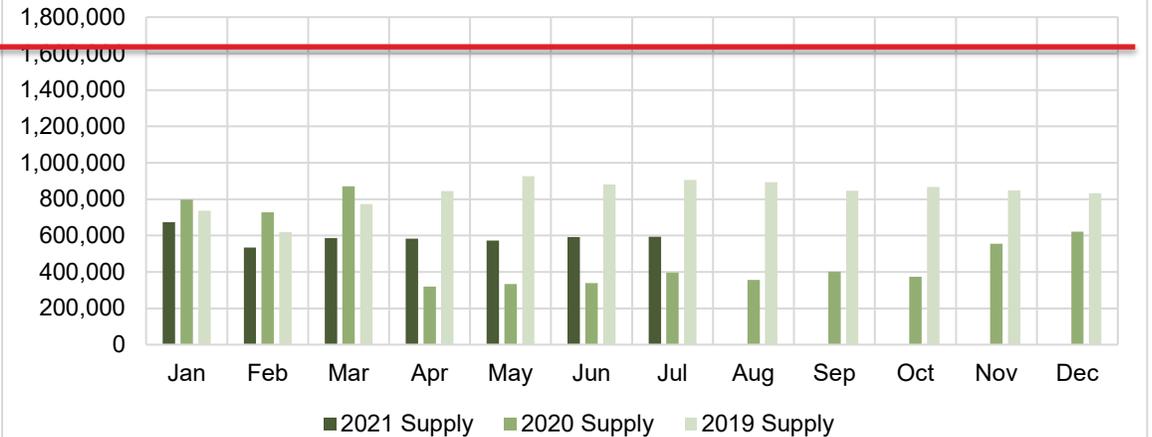
State of Hawai'i Vacation Rental Performance

	2021	2020	2019
Occupancy	81.8%	14.1%	77.8%
ADR	\$251	\$197	\$207

State of Hawai'i Hotel Room Night Supply



State of Hawai'i Vacation Rental Unit Night Supply



Source: STR, Inc., Transparent Intelligence, Inc. © Copyright 2021 Hawai'i Tourism Authority

July 2021 Highlights

ACCOMMODATIONS - % Total	Total by Air	US West	US East	Japan	Canada
Plan to stay in Hotel	55.4%	53.4%	60.3%	12.5%	48.0%
Plan to stay in Condo	18.5%	19.6%	16.2%	59.1%	24.2%
Plan to stay in Timeshare	9.8%	10.6%	8.3%	3.2%	6.1%
Cruise Ship	0.0%	0.0%	0.0%	0.0%	0.1%
Friends/Relatives	11.2%	10.7%	11.9%	25.0%	14.1%
Bed & Breakfast	0.8%	0.7%	1.0%	0.3%	1.2%
Rental House	11.1%	11.1%	11.6%	1.2%	11.4%
Hostel	0.5%	0.4%	0.6%	0.1%	1.8%
Camp Site, Beach	0.4%	0.4%	0.6%	0.0%	1.4%
Private Room in Private Home**	0.7%	0.7%	0.8%	0.2%	2.8%
Shared Room/Space in Private Home**	0.2%	0.2%	0.2%	0.6%	0.2%
Other	1.4%	1.2%	1.4%	0.5%	2.9%

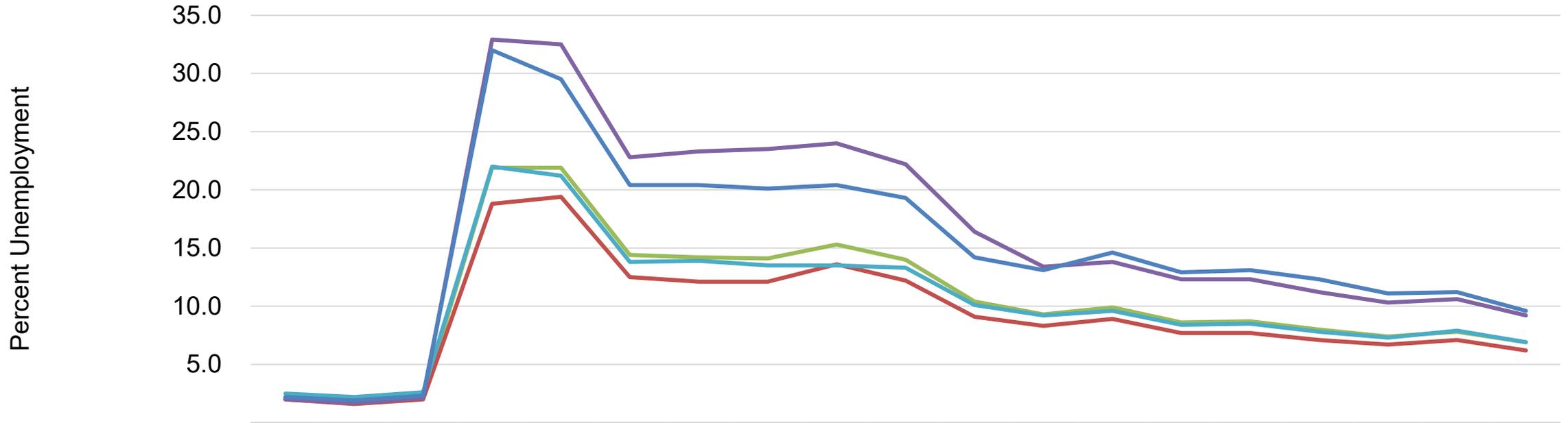
Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of August 23, 2021, subject to change

July 2021 Highlights

PURPOSE OF TRIP - % Total	Total by Air	US West	US East	Japan	Canada
Pleasure (Net)	88.7%	89.9%	87.2%	77.1%	82.6%
Honeymoon/Get Married	3.3%	2.6%	4.8%	1.3%	6.4%
Honeymoon	2.8%	2.1%	4.3%	0.8%	4.5%
Get Married	0.6%	0.5%	0.7%	0.5%	2.2%
Pleasure/Vacation	86.1%	87.9%	83.2%	76.0%	76.6%
Mtgs/Conventions/Incentive	1.0%	0.8%	1.3%	1.8%	1.3%
Conventions	0.4%	0.4%	0.5%	0.4%	0.7%
Corporate Meetings	0.3%	0.2%	0.3%	1.4%	0.5%
Incentive	0.3%	0.2%	0.5%	0.0%	0.1%
Other Business	1.5%	1.5%	1.6%	2.7%	3.1%
Visit Friends/Rel.	11.2%	10.7%	11.8%	15.6%	15.6%
Gov't/Military	0.8%	0.4%	1.5%	0.3%	0.6%
Attend School	0.1%	0.1%	0.1%	2.4%	0.2%
Sport Events	0.2%	0.2%	0.2%	0.3%	0.1%
Other	1.7%	1.5%	1.9%	2.4%	2.4%

July 2021 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
State of Hawai'i	2.1	1.7	2.1	21.9	21.9	14.4	14.2	14.1	15.3	14.0	10.4	9.3	9.9	8.6	8.7	8.0	7.4	7.8	6.9
Honolulu County	2.0	1.6	2.0	18.8	19.4	12.5	12.1	12.1	13.6	12.2	9.1	8.3	8.9	7.7	7.7	7.1	6.7	7.1	6.2
Hawai'i County	2.5	2.2	2.6	22.0	21.2	13.8	13.9	13.5	13.5	13.3	10.1	9.2	9.6	8.4	8.5	7.8	7.3	7.9	6.9
Maui County	2.0	1.7	2.1	32.9	32.5	22.8	23.3	23.5	24.0	22.2	16.4	13.4	13.8	12.3	12.3	11.2	10.3	10.6	9.2
Kaua'i County	2.2	1.9	2.3	32.0	29.5	20.4	20.4	20.1	20.4	19.3	14.2	13.1	14.6	12.9	13.1	12.3	11.1	11.2	9.6

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

July Payroll Jobs Recovery From Pre-COVID (% of Jan. 2020 level)

Industry	State	Honolulu County	Hawaii County	Maui County	Kauai County
Total	87.2	89.3	86.9	79.1	76.6
Number of payroll jobs still lost	84,200	50,600	9,300	16,900	7,800
Construction	103.8	105.7	97.2	100.0	100.0
Manufacturing	85.4	84.1	100.0	75.0	80.0
Wholesale trade	99.4	102.8	88.9	81.3	80.0
Retail trade	82.3	80.5	92.8	81.0	82.9
Transportation & utilities	76.2	78.2	78.1	67.3	62.5
Information	76.7	74.0	100.0	80.0	100.0
Financial activities	91.9	96.5	81.5	70.0	75.0
Professional & business services	94.1	98.3	83.8	74.3	84.4
Educational services	81.0	80.0	92.3	75.0	66.7
Health care	93.8	94.3	89.9	93.9	93.1
Hospitality	76.0	81.9	72.7	70.2	52.8
Other services	82.2	80.4	100.0	79.4	90.9
Federal government	97.4	97.2	100.0	100.0	100.0

Source: DLIR

DBEDT Tourism Forecast

ACTUAL AND FORECAST OF KEY ECONOMIC INDICATORS FOR HAWAII: 2019 TO 2024

Economic Indicators	2019	2020 1/	2021	2022	2023	2024
	Actual		Forecast			
Visitor arrivals (thousands) 3/	10,387	2,716	6,637	8,553	9,543	10,138
Visitor days (thousands) 3/	90,361	28,702	60,386	76,473	84,499	88,857
Visitor expenditures (million dollars) 3/	17,844	5,111	11,132	14,911	16,833	18,048
Annual Percentage Change						
Visitor arrivals	5.0	-73.9	144.4	28.9	11.6	6.2
Visitor days	2.4	-68.2	110.4	26.6	10.5	5.2
Visitor expenditures	1.1	-71.4	117.8	34.0	12.9	7.2

Source: DBEDT as of August 26, 2021

- Data Sources & Partners
- Impact Summary
- Travel Indicators
- Int'l Arrivals to the U.S.
- Economic Conditions
- Employment
- Travel Sentiment
- Covid-19 Vaccination
- Predictive DMO Indicators
- Predictive Industry Indicators
- Economic Forecast
- Domestic Travel Forecast
- International Visitor Forecast
- US Hotel Forecast

U.S. Resident Vacation Intentions

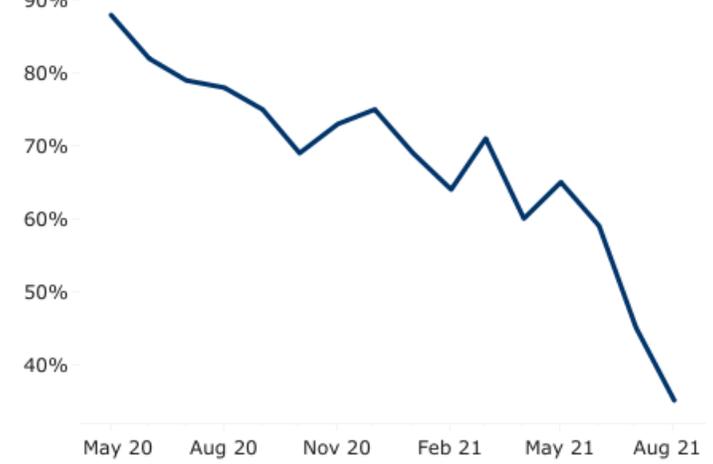
% of U.S. residents intending to travel in the next 6-months



Source: The Conference Board

U.S. Business Travel Sentiment

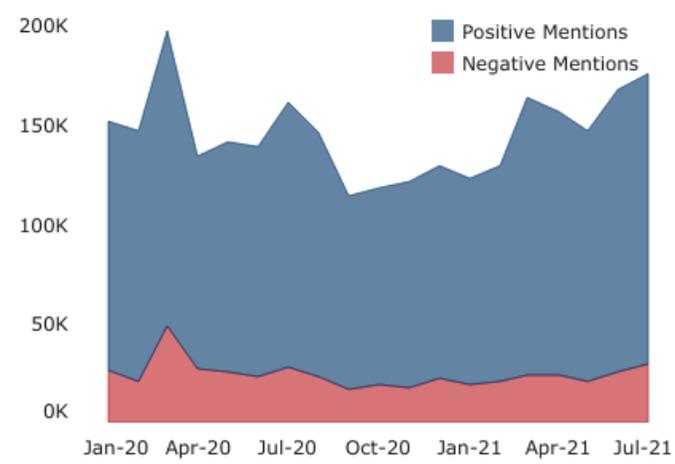
Companies that have canceled/suspended most or all domestic tr..



Source: GBTA Business Travel Survey

Social Travel Sentiment by Month

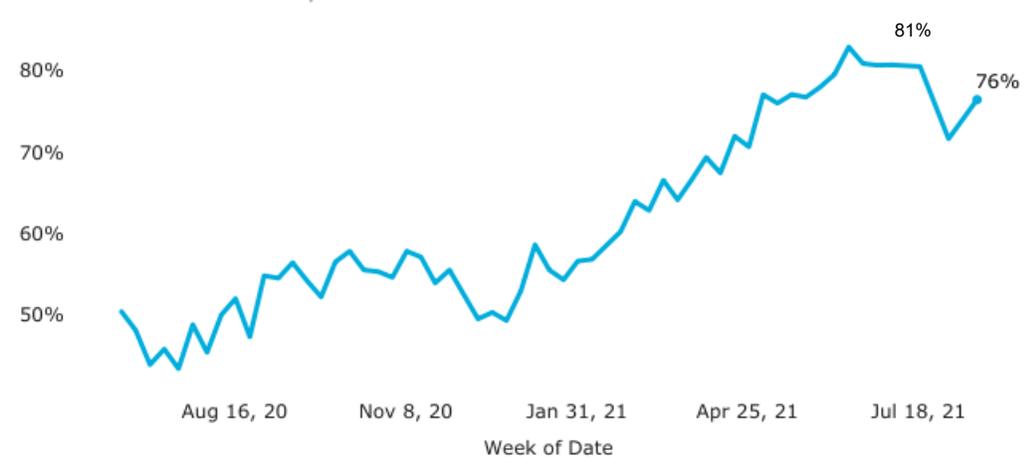
Positive vs. negative mentions of travel Jan-20 to Jul-21



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

COVID-19 Impact on U.S. Avid Travelers

An HVCB analysis of YouGov data provided by HTA as of August 8, 2021

Reported on August 18, 2021

YouGov[®]

HAWAII TOURISM[™]
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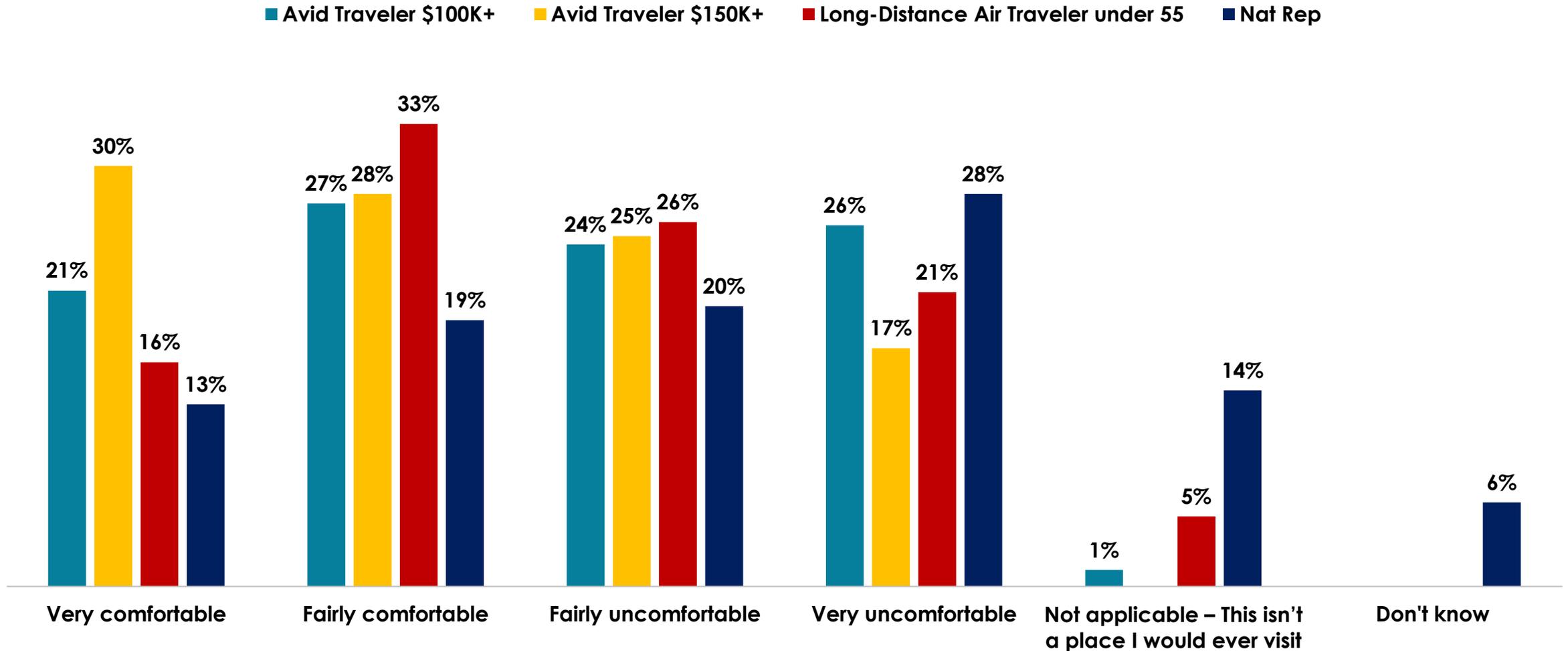
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VISITORS & CONVENTION BUREAU[™]





Travelers' Pandemic Outlook

Level of comfort visiting an airport right now

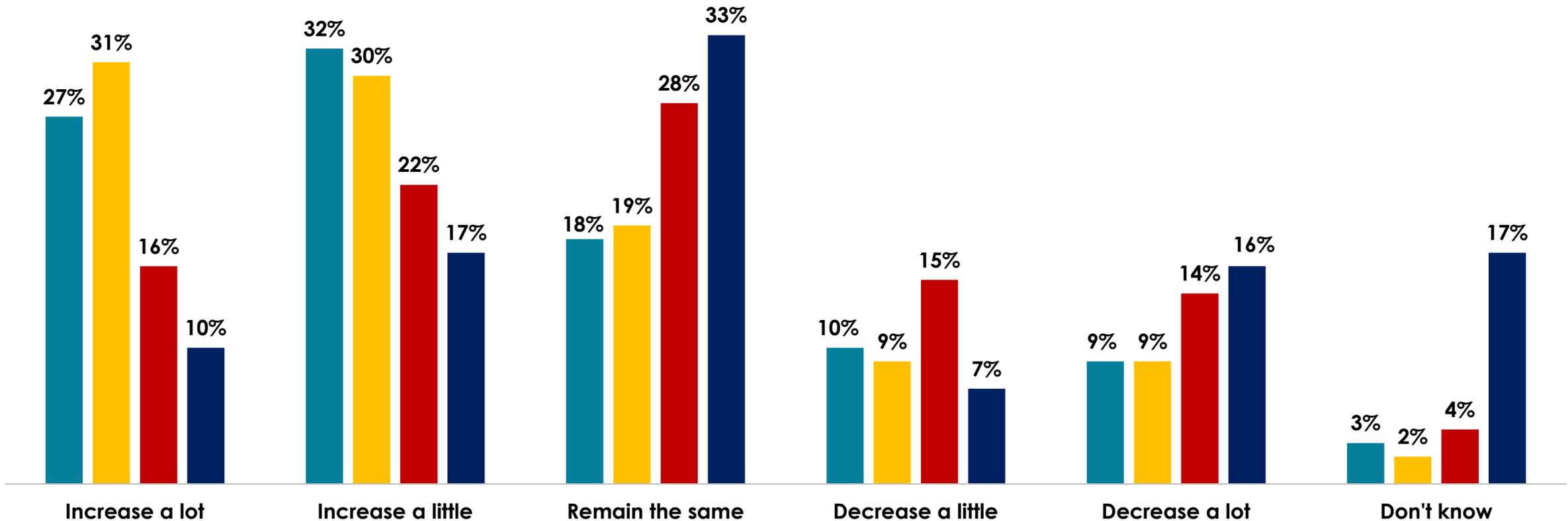




Future Travel Plans

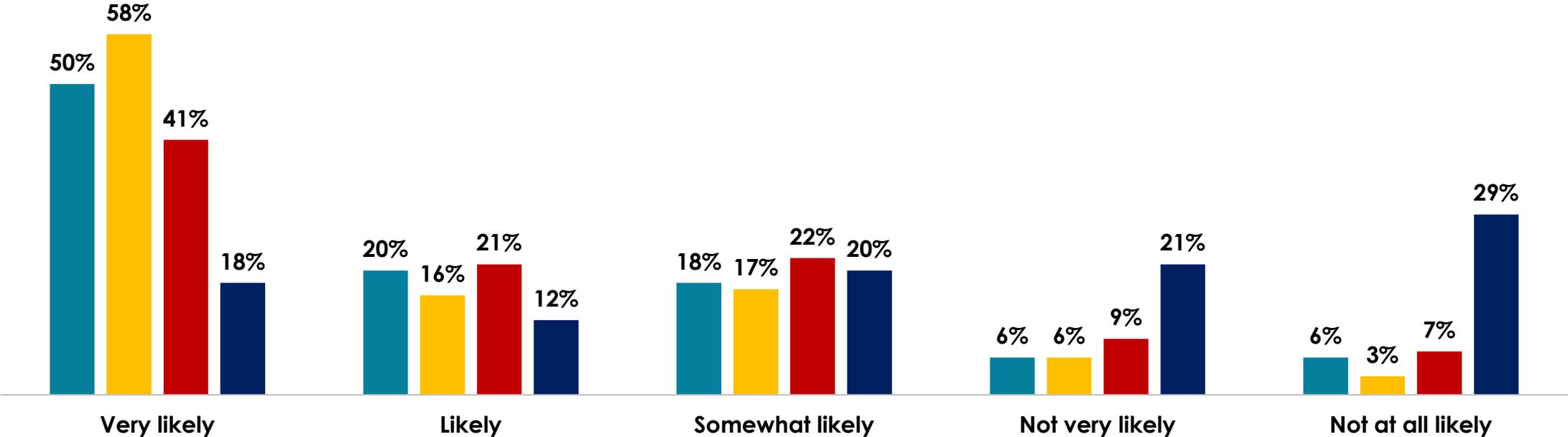
Future Travel – Expected change to air travel in the next 12 months

■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Future Travel – Likelihood of purchasing travel or leisure services in the next 12 months

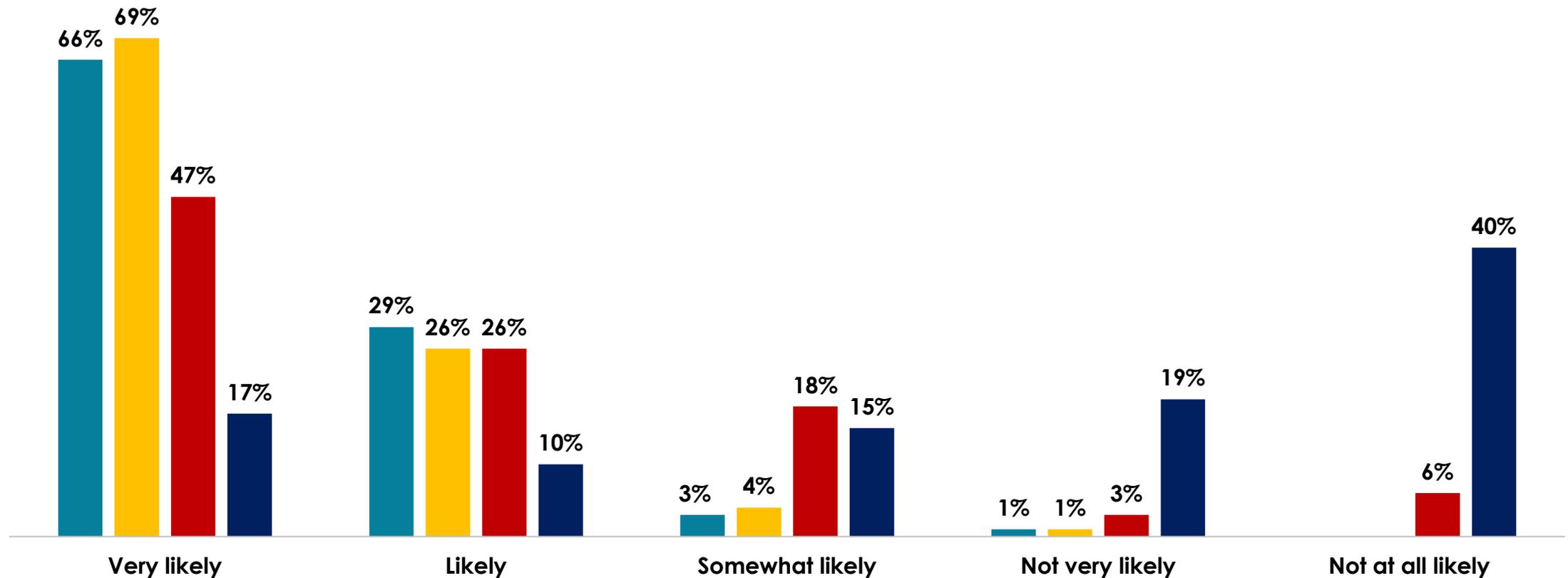
■ Avid Traveler \$100K+
 ■ Avid Traveler \$150K+
 ■ Long-Distance Air Traveler under 55
 ■ Nat Rep



Source: HVCB analysis of YouGov data provided by HTA as of August 8, 2021

Future Travel – Likelihood of booking a flight in the next 12 months

■ Avid Traveler \$100K+ ■ Avid Traveler \$150K+ ■ Long-Distance Air Traveler under 55 ■ Nat Rep



Scheduled Nonstop Seats to Hawai'i by Port Entry

August	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,172,897	177,923	1,203,531	1,136,856	165,463	891,415	36,041	12,460	312,116
HONOLULU	584,396	152,033	746,985	552,118	139,573	453,028	32,278	12,460	293,957
KAHULUI	338,709	12,373	257,291	334,946	12,373	248,915	3,763	0	8,376
KONA	138,535	9,657	108,231	138,535	9,657	98,448	0	0	9,783
HILO	5,549	0	4,804	5,549	0	4,804			
LIHU'E	105,708	3,860	86,220	105,708	3,860	86,220	0	0	0

September	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,008,729	155,255	1,006,682	969,215	143,709	711,856	39,514	11,546	294,826
HONOLULU	507,506	129,049	660,257	473,823	117,503	382,095	33,683	11,546	278,162
KAHULUI	277,108	13,195	204,791	271,277	13,195	197,711	5,831	0	7,080
KONA	119,681	9,453	74,540	119,681	9,453	64,956	0	0	9,584
HILO	4,117	0	3,486	4,117	0	3,486	0	0	0
LIHU'E	100,317	3,558	63,608	100,317	3,558	63,608	0	0	0

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of August 31, 2021, subject to change

Scheduled Nonstop Seats to Hawai'i by Port Entry

October	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,103,861	221,716	1,057,045	984,385	207,560	760,985	119,476	14,156	296,060
HONOLULU	581,842	154,259	673,909	474,413	140,103	399,574	107,429	14,156	274,335
KAHULUI	285,283	31,068	222,366	277,397	31,068	211,816	7,886	0	10,550
KONA	129,452	23,045	83,243	125,465	23,045	72,590	3,987	0	10,653
HILO	3,938	0	4,648	3,938	0	4,648	0	0	0
LIHU'E	103,346	13,344	72,879	103,172	13,344	72,357	174	0	522

November	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,221,067	437,024	1,066,503	984,959	421,726	764,288	236,108	15,298	302,215
HONOLULU	673,087	234,788	656,979	477,853	219,490	395,176	195,234	15,298	261,803
KAHULUI	297,189	107,560	231,519	274,495	107,560	209,739	22,694	0	21,780
KONA	139,439	45,458	93,017	124,913	45,458	78,213	14,526	0	14,804
HILO	4,319	0	3,818	4,319	0	3,818	0	0	0
LIHU'E	107,033	49,218	81,170	103,379	49,218	77,342	3,654	0	3,828

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of August 31, 2021, subject to change

YouGov Destination Index Trends

August 30, 2021



YouGov Syndicated Survey

- HTA subscribes to YouGov's BrandIndex and Profiles databases for the U.S., Japan, and Canada
- YouGov has a global consumer panel with over 6 million participants in 42 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent, consumer status

Destination Index

- Metrics

- Buzz

- Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks

- Recommend

- Net % would recommend to others minus % would tell to avoid

- Word of Mouth Exposure

- Yes% talked with someone about the brand (in-person, online or through social media)

- Consideration

- Yes% would consider purchasing a brand when next in market

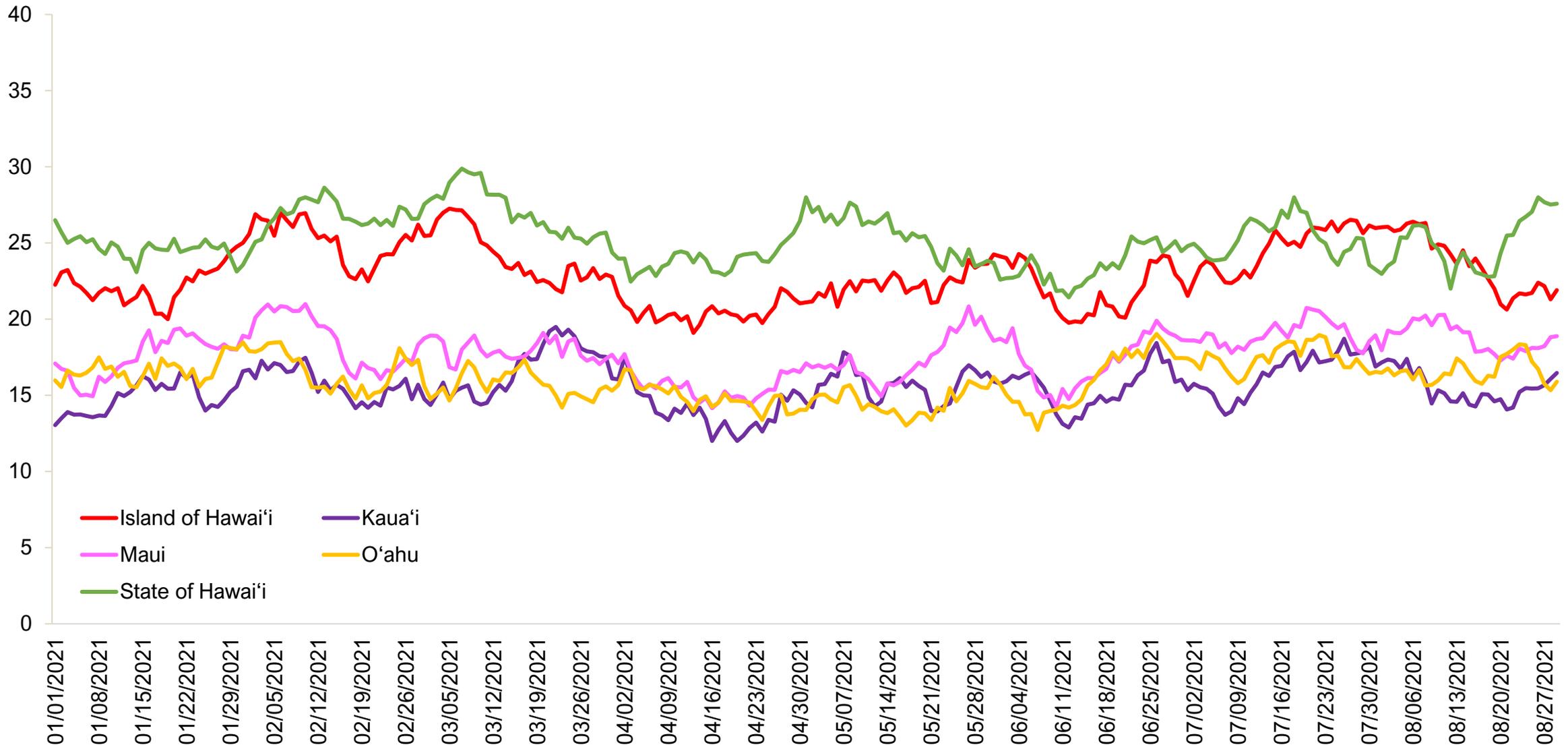
- Purchase Intent

- Yes % most likely to visit the brand in question, of all brands considered

- Indexing

- U.S. and Japan data are indexed to January 1, 2020, as a pre-COVID-19 baseline to compare magnitude in shifts across markets. Canada data began on September 18, 2020, well into the pandemic, and thus cannot be indexed to a pre-pandemic date.

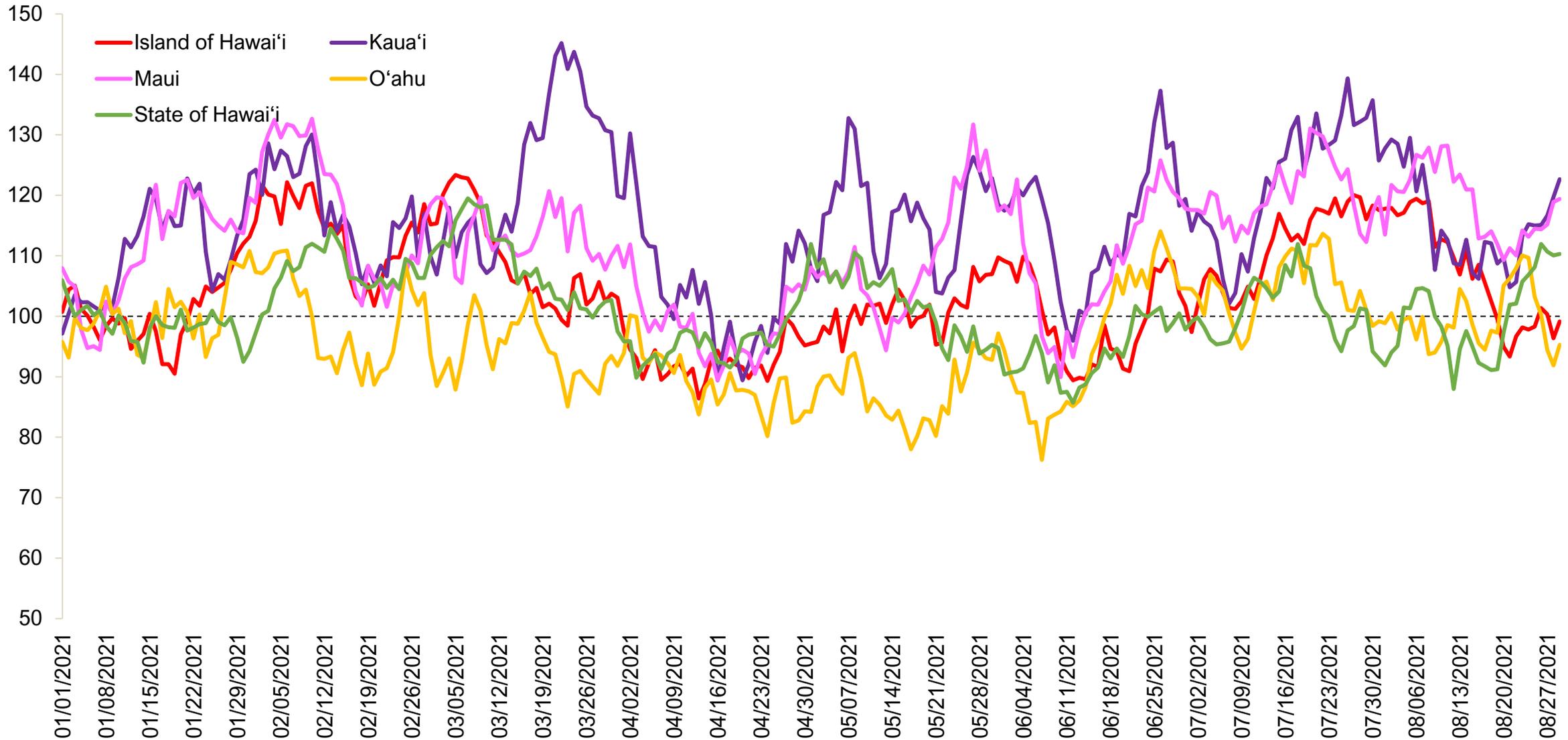
U.S. Consideration (% Yes) Two-Week Moving Average



Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Source: YouGov data as of August 29, 2021

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



Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

YouGov Consideration

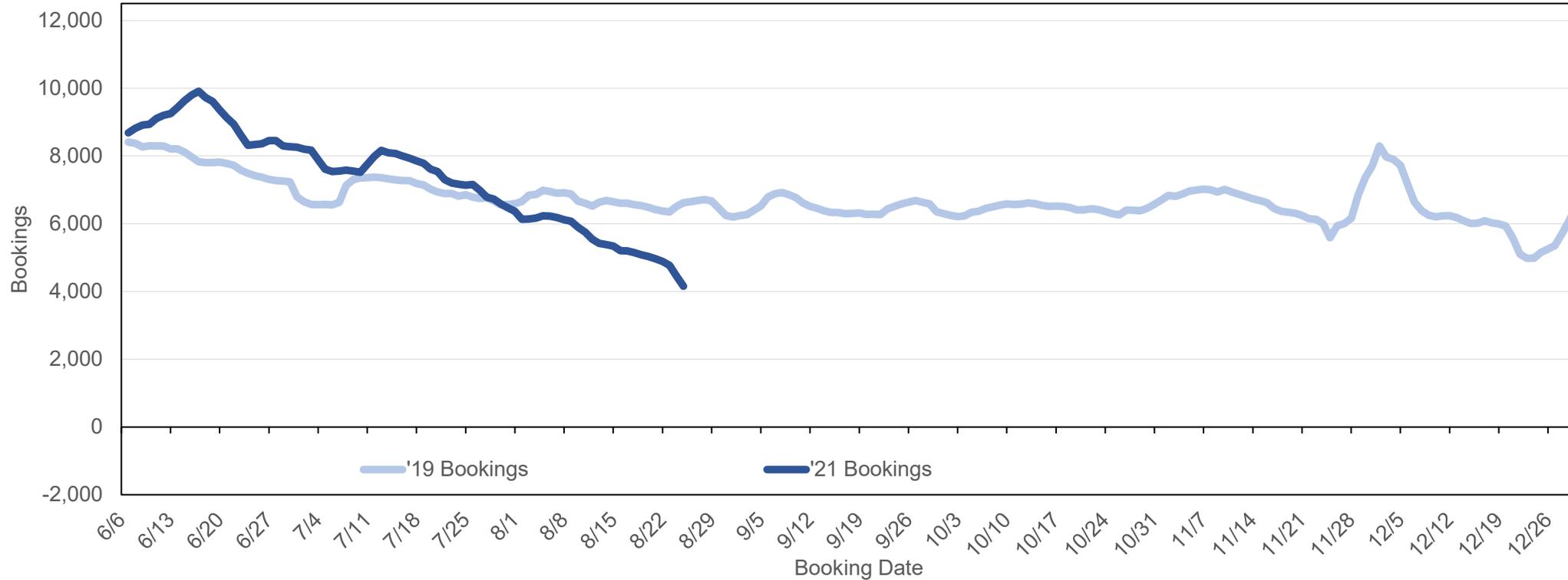
- Trigger questions for people considering Hawai'i for their next vacation
 - Impact of Delta variant
 - Impact of Governor Ige announcement

TRAVEL AGENCY BOOKING TRENDS

AUGUST 30, 2021

Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals*
Based on a 7-day Moving Average as of August 29, 2021
U.S.



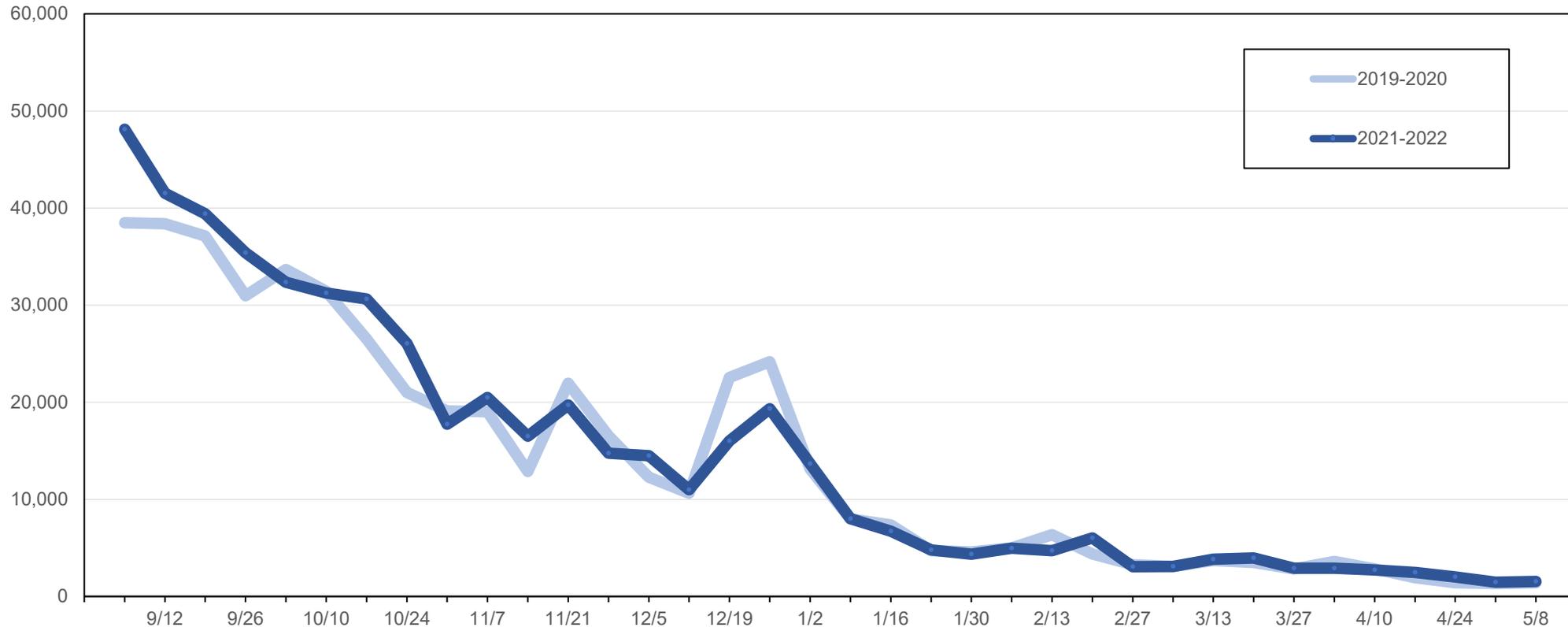
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.

Update: Aug 29, 2021

Source: Global Agency Pro

Travel Agency Bookings to Hawai'i for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of August 29, 2021
U.S.

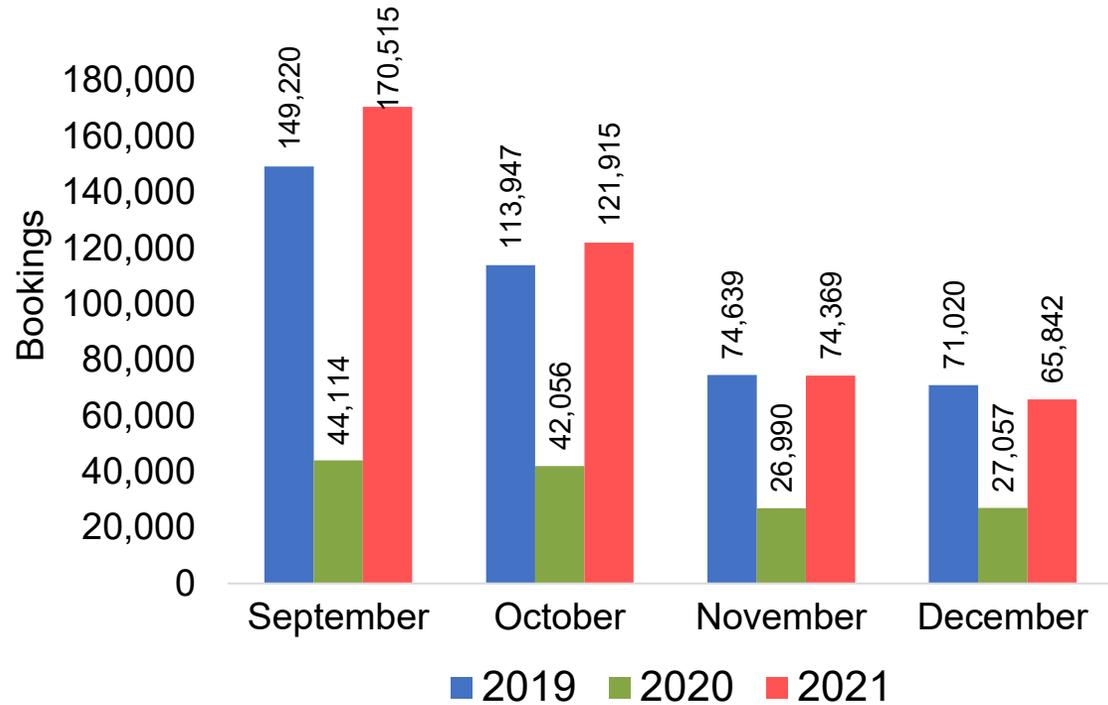


Source: Global Agency Pro, as of August 29, 2021

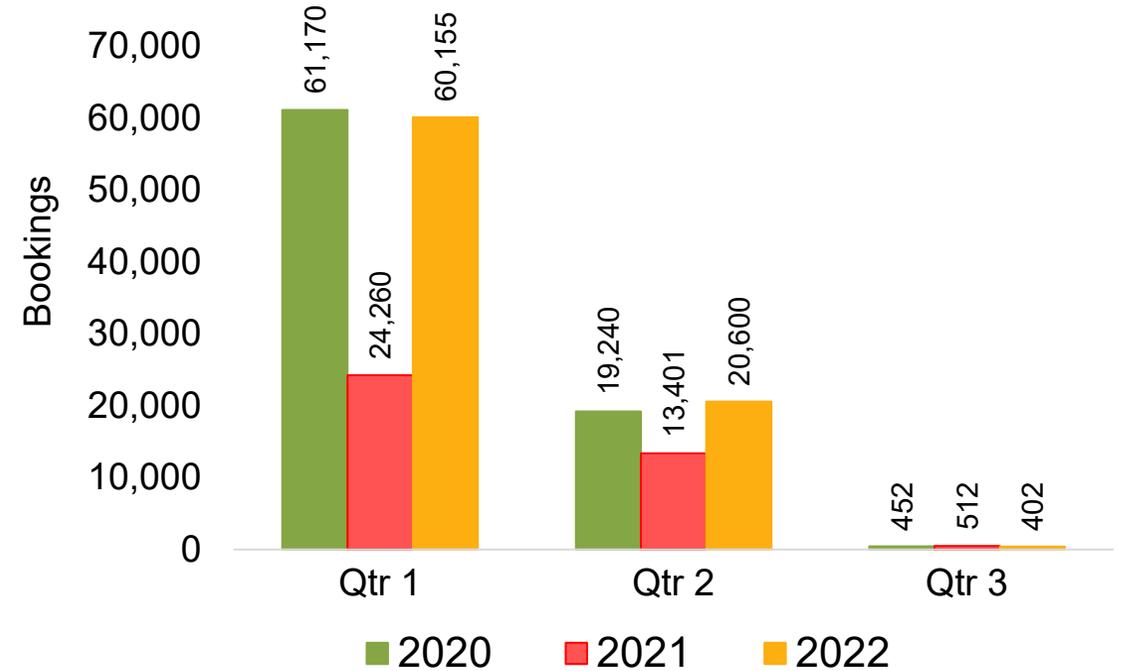
Source: Global Agency Pro

US

Travel Agency Booking Pace for Future Arrivals, by Month



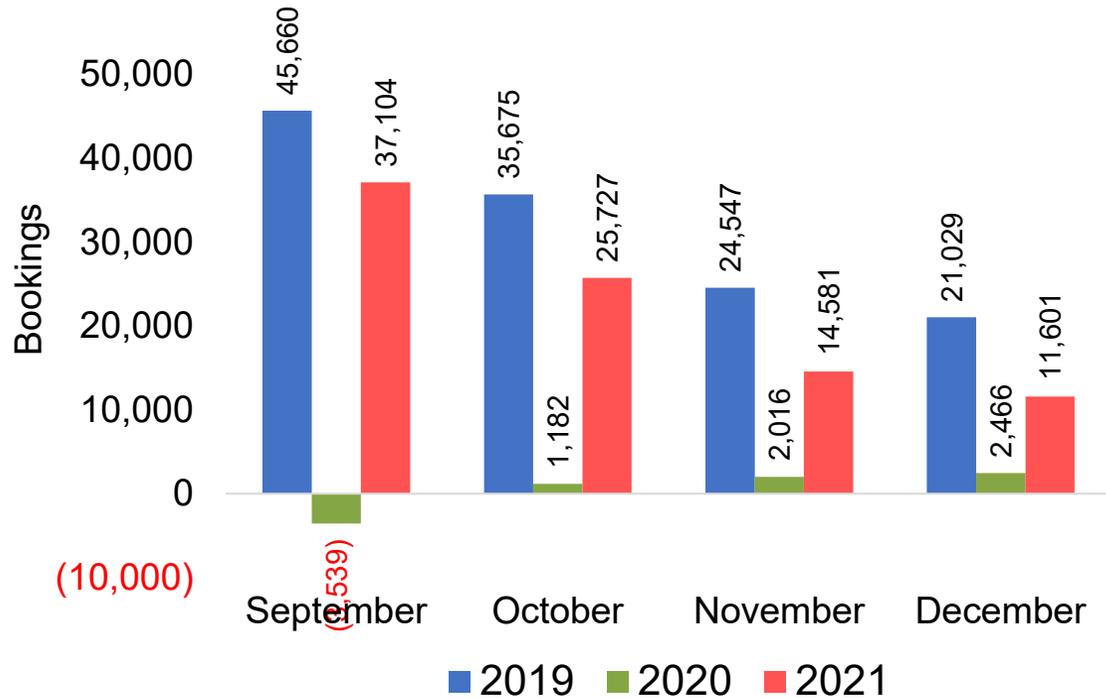
Travel Agency Booking Pace for Future Arrivals, by Quarter



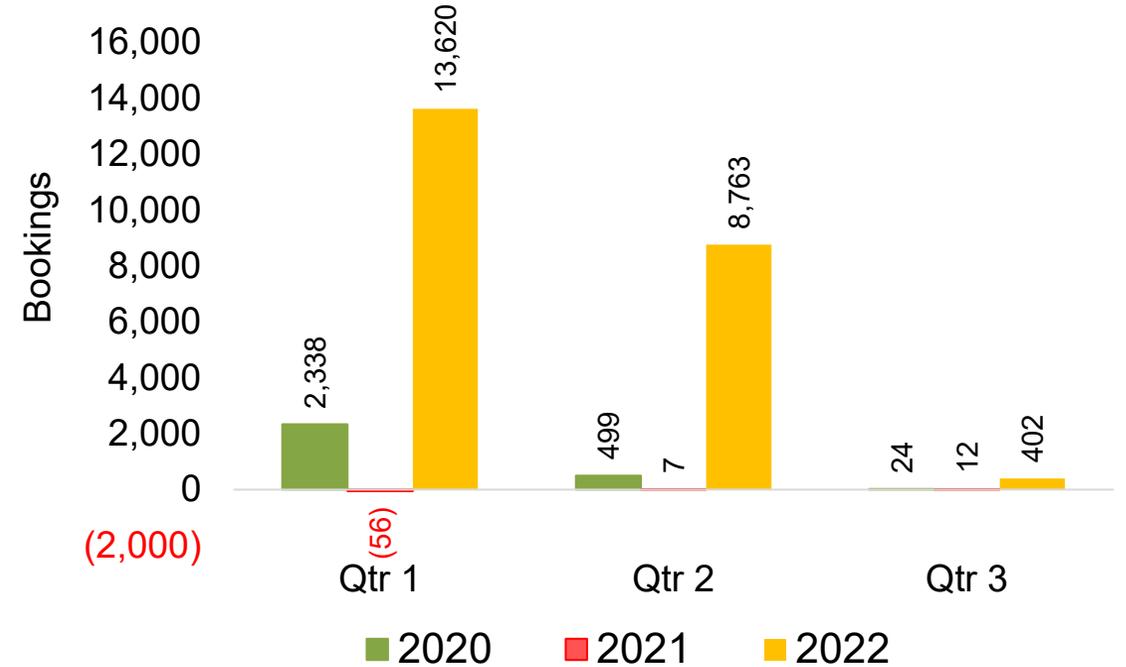
Source: Global Agency Pro as of 08/28/21

US

Travel Agency Booking Pickup for Future Arrivals, by Month



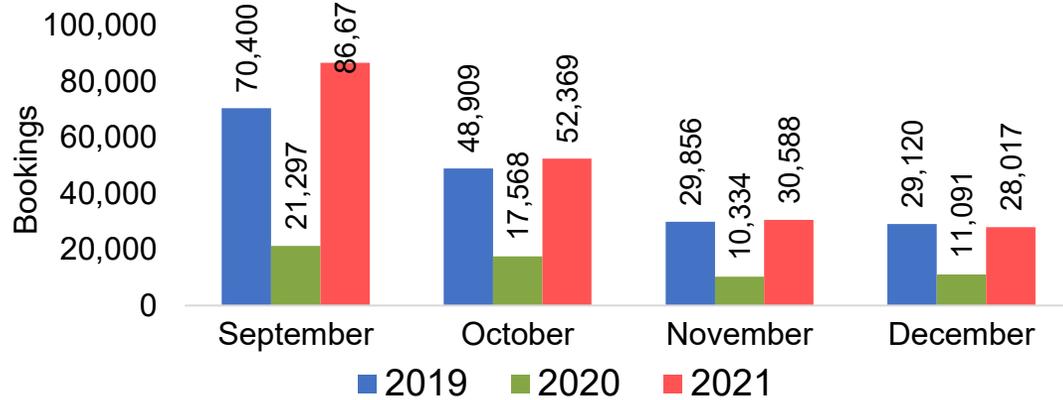
Travel Agency Booking Pickup for Future Arrivals, by Quarter



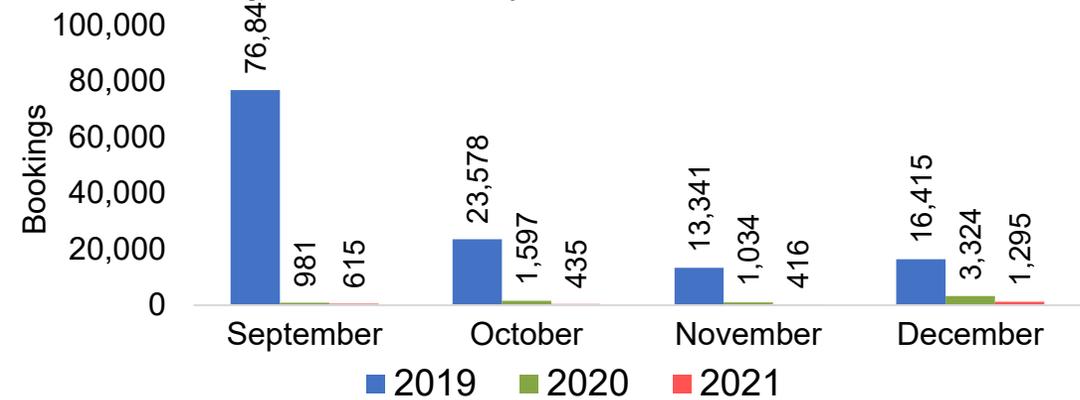
Source: Global Agency Pro as of 08/28/21

O'ahu by Month 2021

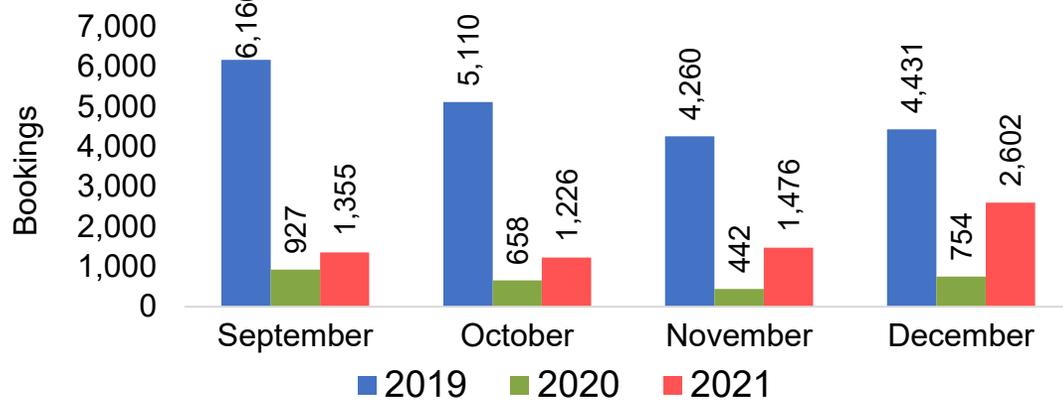
Travel Agency Booking Pace for Future Arrivals
U.S.



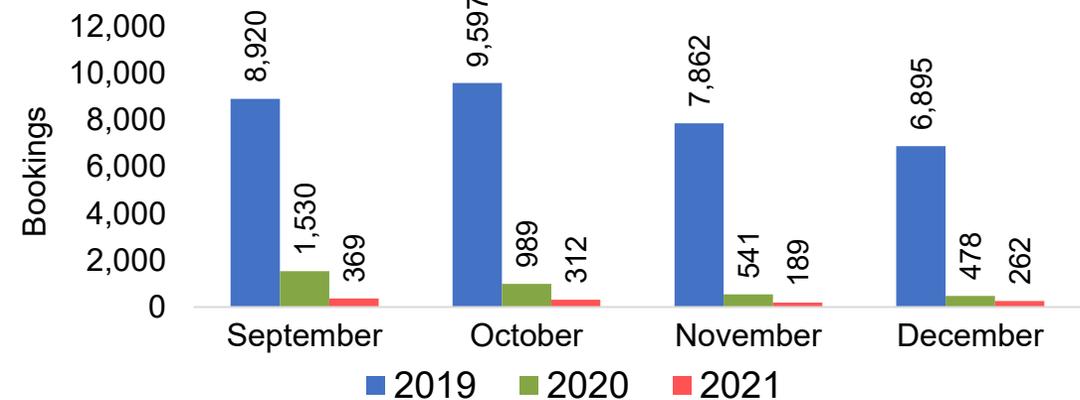
Travel Agency Booking Pace for Future Arrivals
Japan



Travel Agency Booking Pace for Future Arrivals
Canada

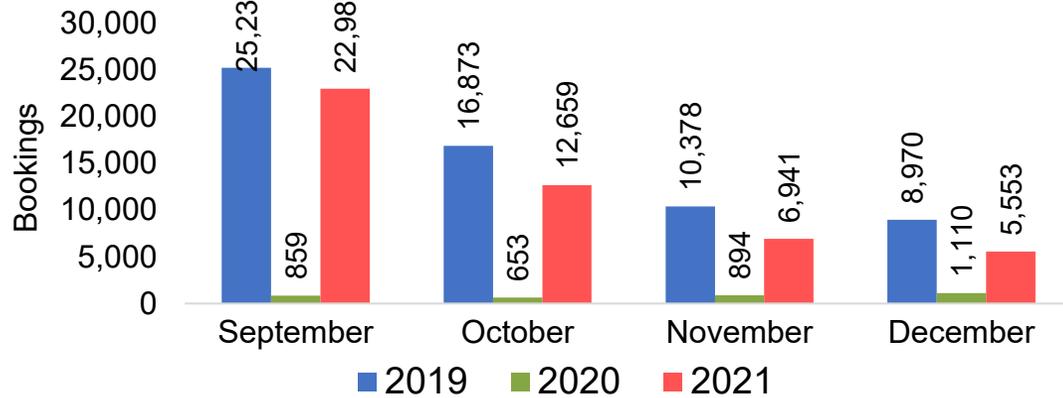


Travel Agency Booking Pace for Future Arrivals
Korea

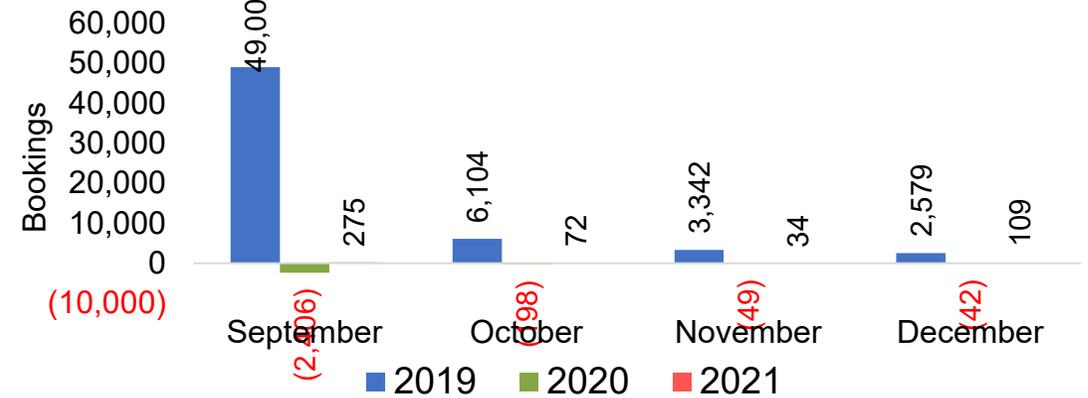


O'ahu by Month 2021

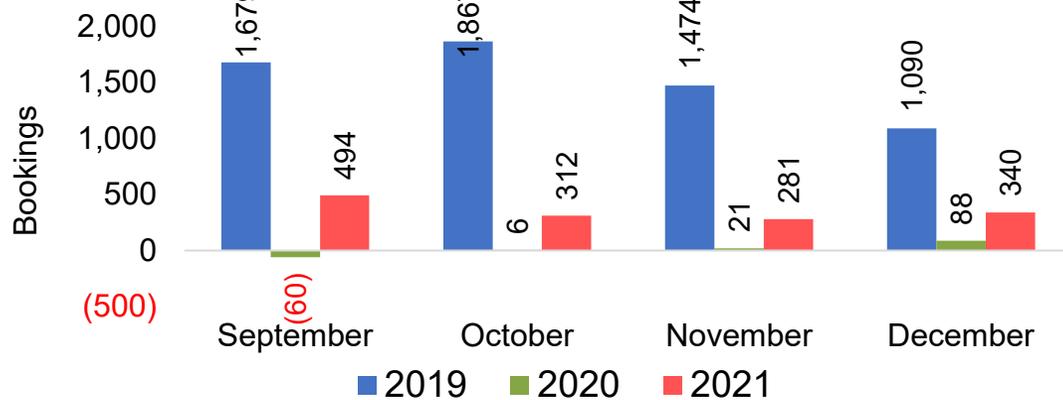
Travel Agency Booking Pickup for Future Arrivals
U.S.



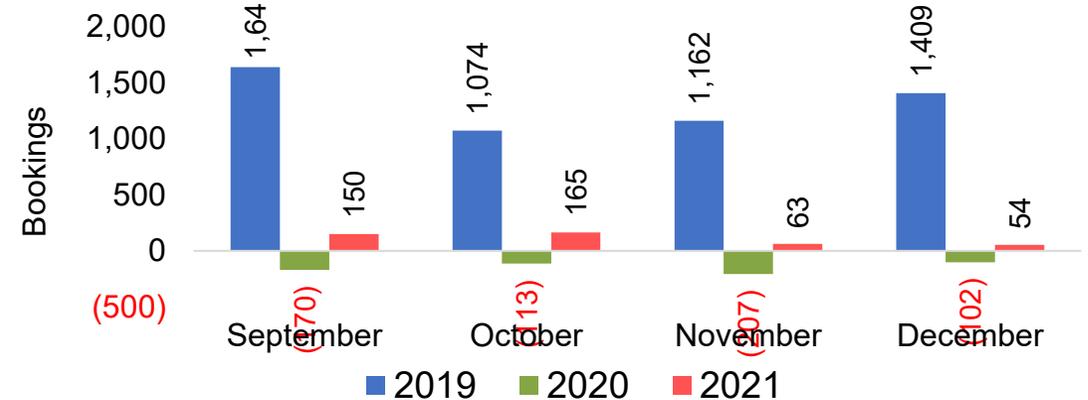
Travel Agency Booking Pickup for Future Arrivals
Japan



Travel Agency Booking Pickup for Future Arrivals
Canada



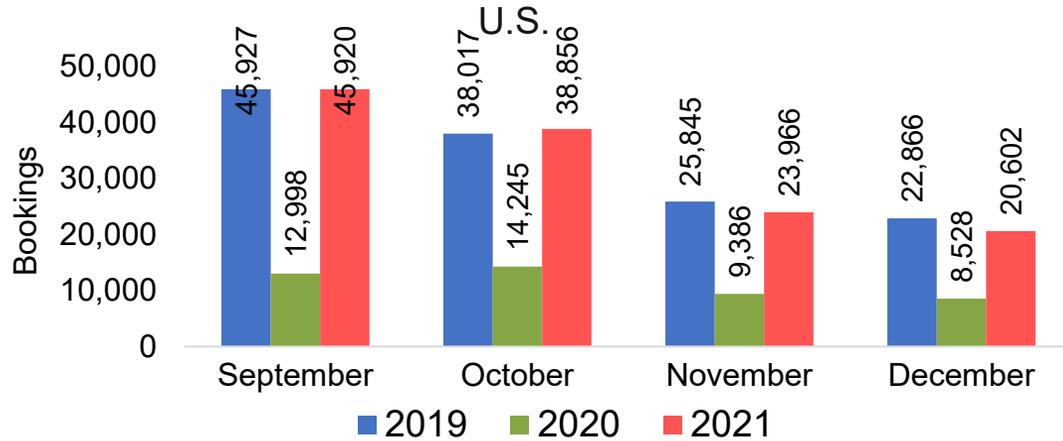
Travel Agency Booking Pickup for Future Arrivals
Korea



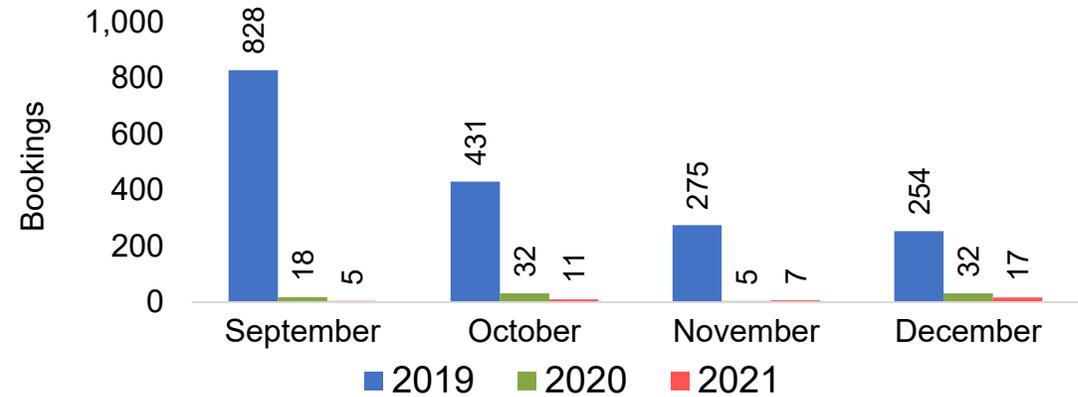
Source: Global Agency Pro as of 08/28/21

Maui by Month 2021

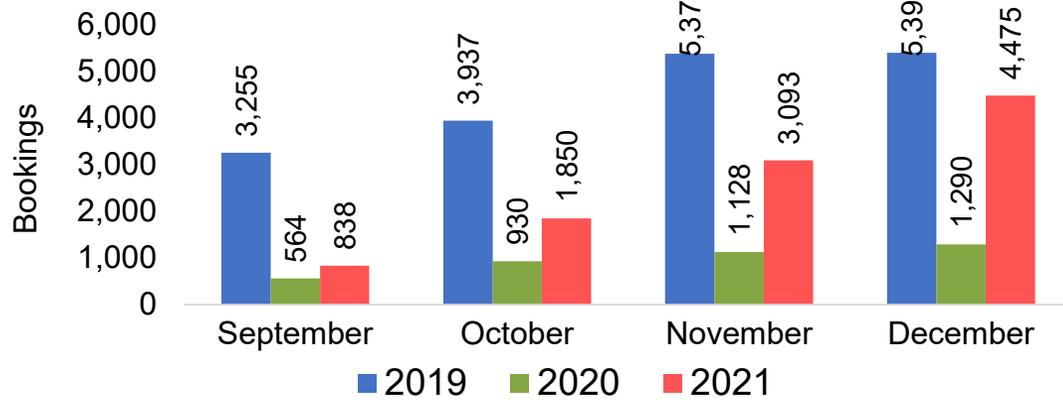
Travel Agency Booking Pace for Future Arrivals



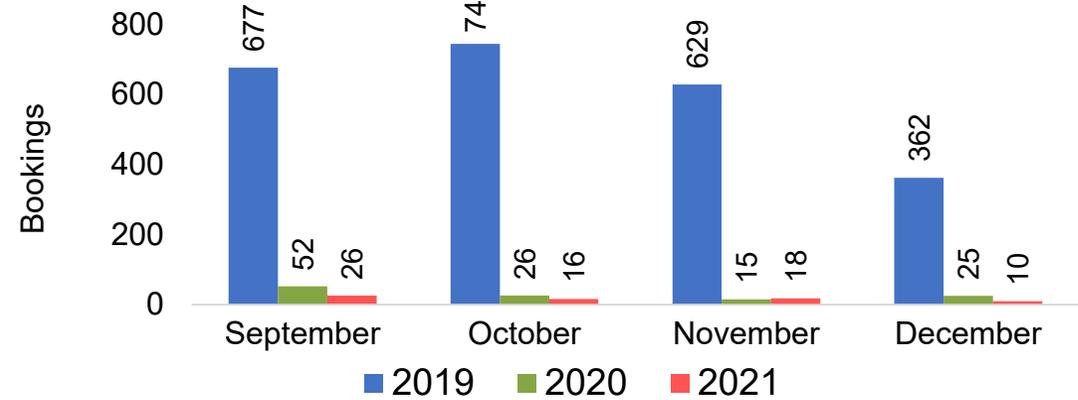
Travel Agency Booking Pace for Future Arrivals
Japan



Travel Agency Booking Pace for Future Arrivals
Canada

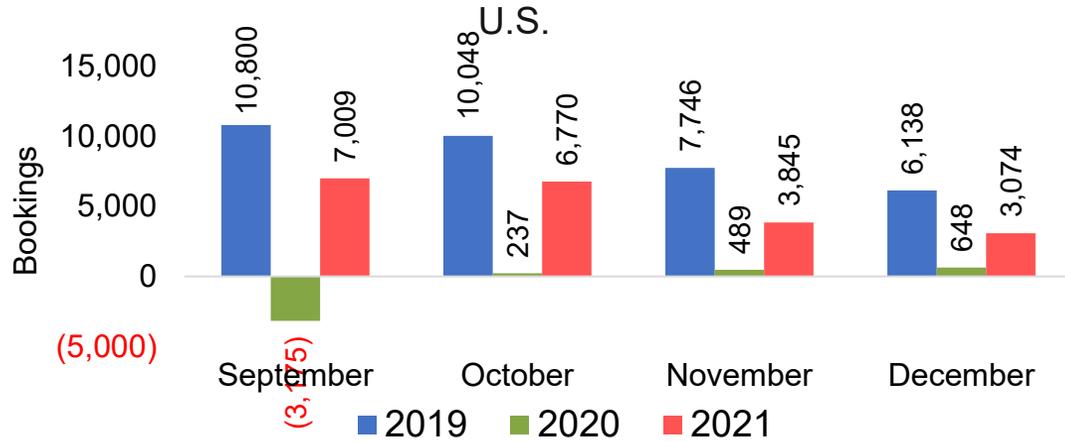


Travel Agency Booking Pace for Future Arrivals
Korea

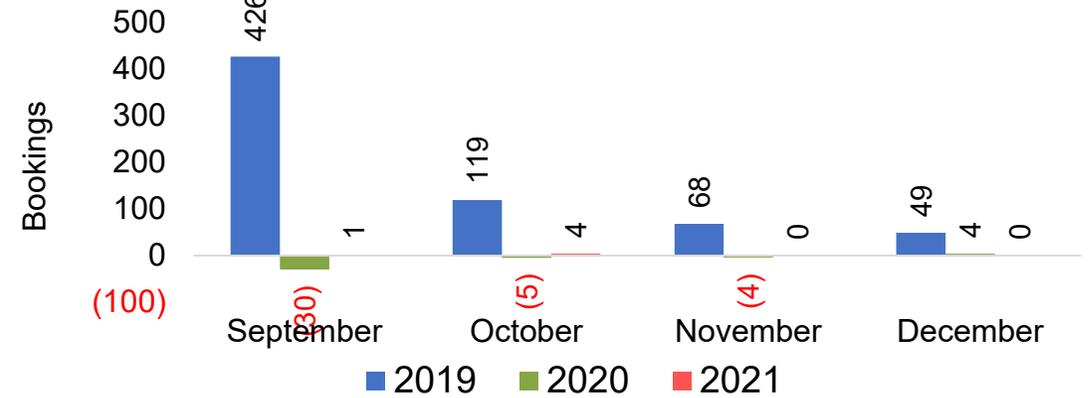


Maui by Month 2021

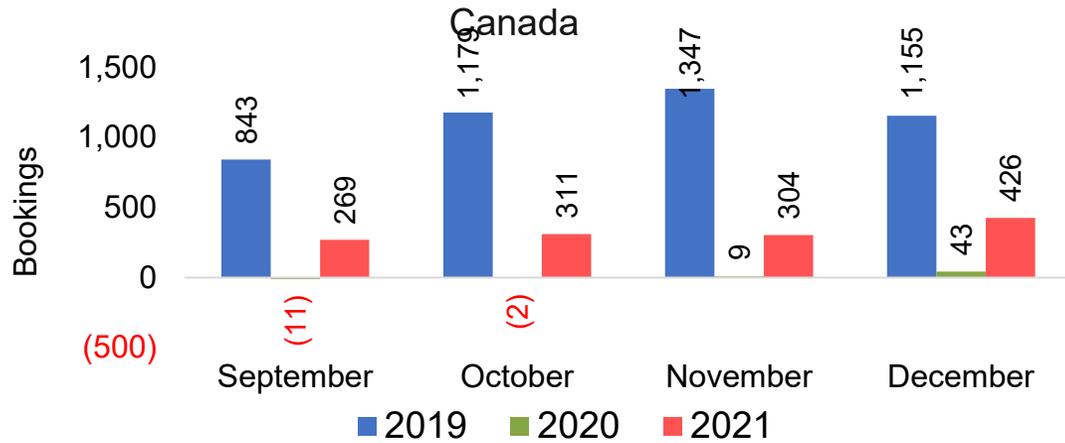
Travel Agency Booking Pickup for Future Arrivals



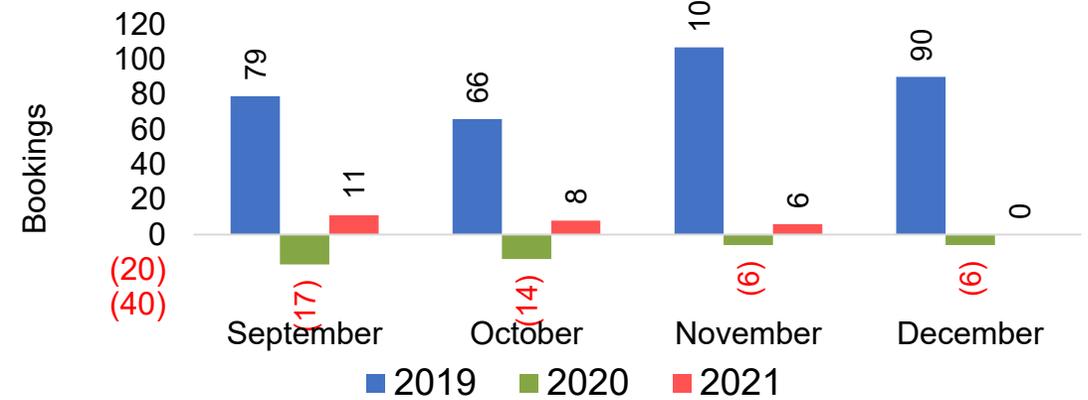
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



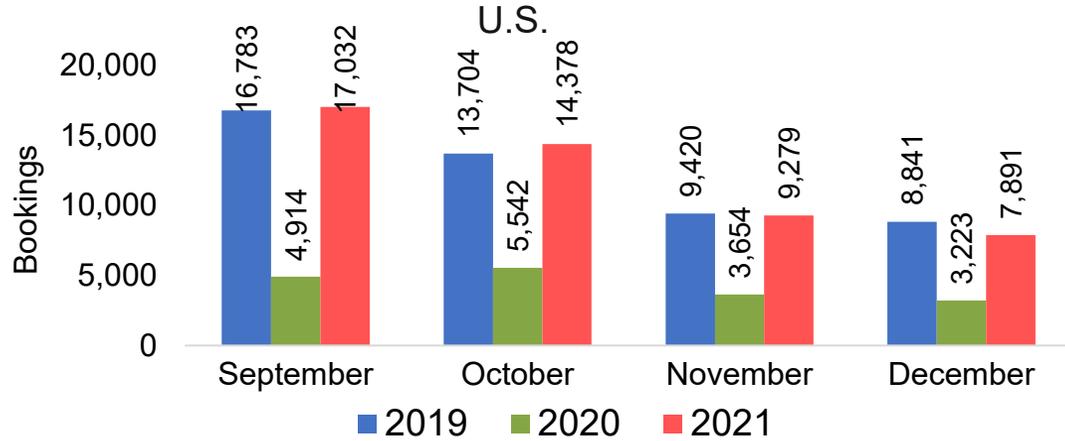
Travel Agency Booking Pickup for Future Arrivals



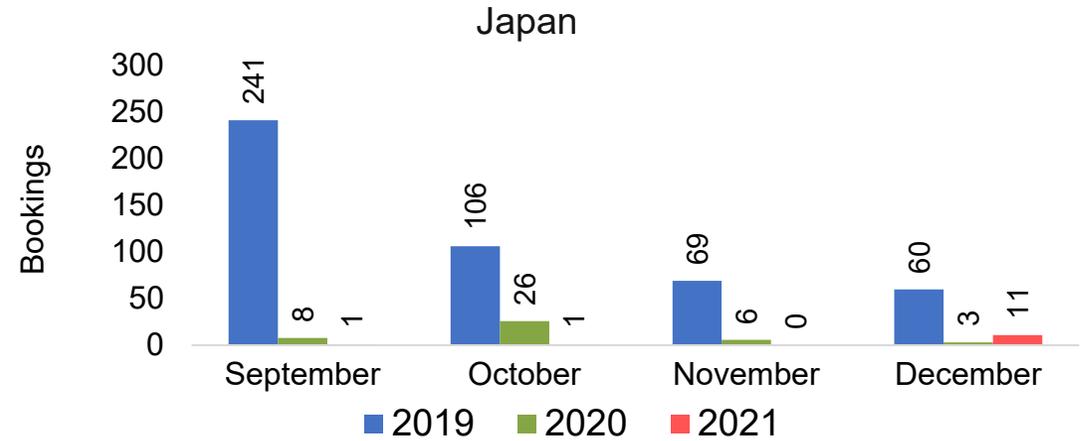
Source: Global Agency Pro as of 08/28/21

Kaua'i by Month 2021

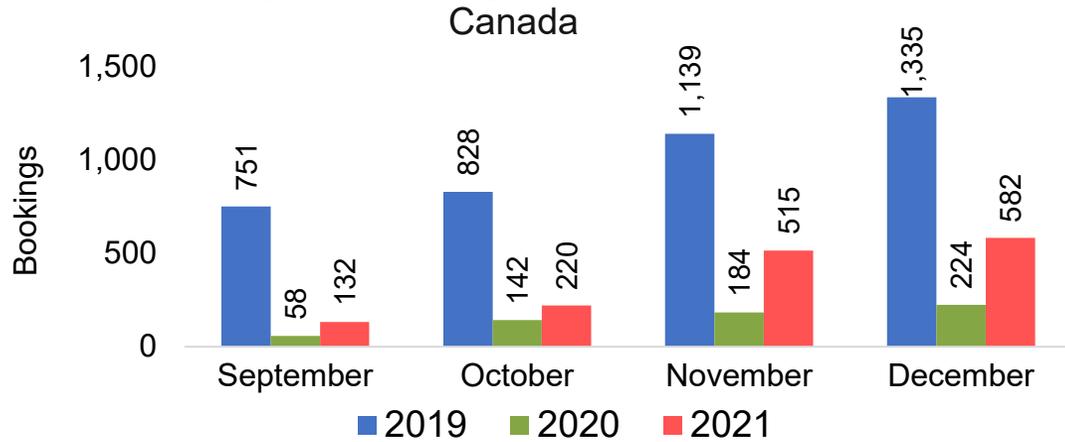
Travel Agency Booking Pace for Future Arrivals



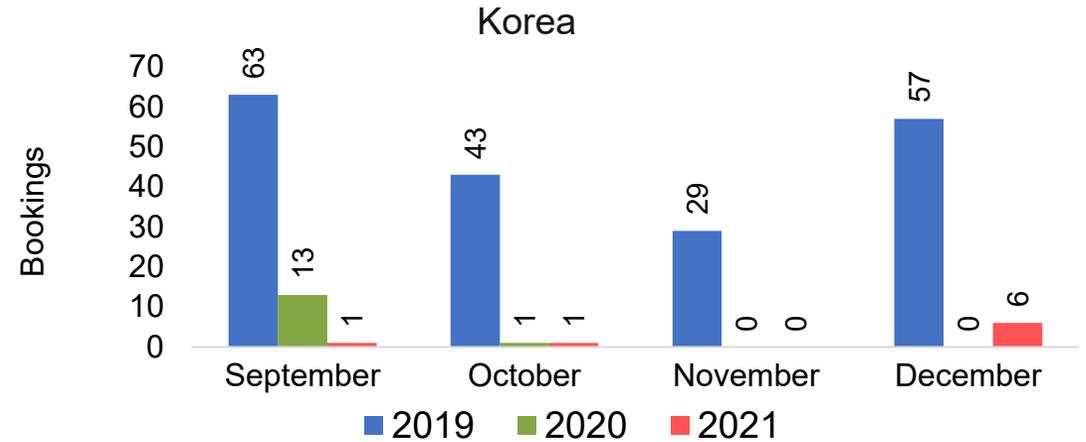
Travel Agency Booking Pace for Future Arrivals



Travel Agency Booking Pace for Future Arrivals



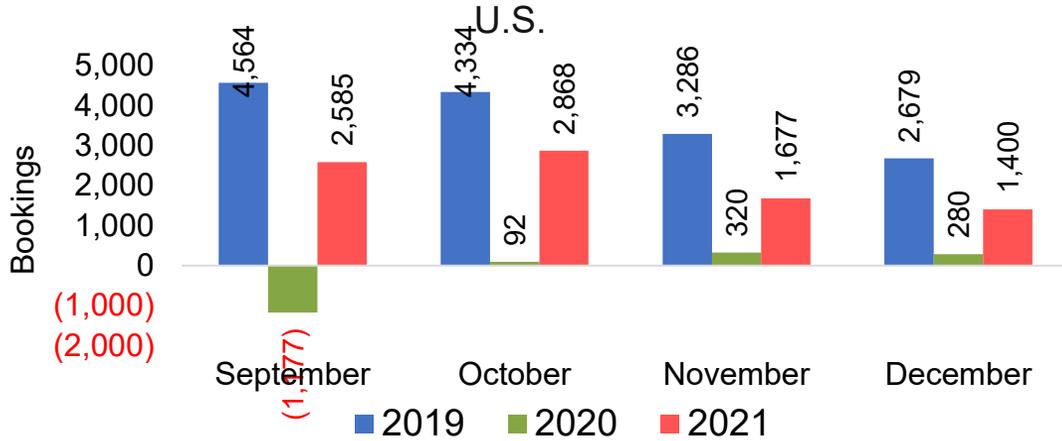
Travel Agency Booking Pace for Future Arrivals



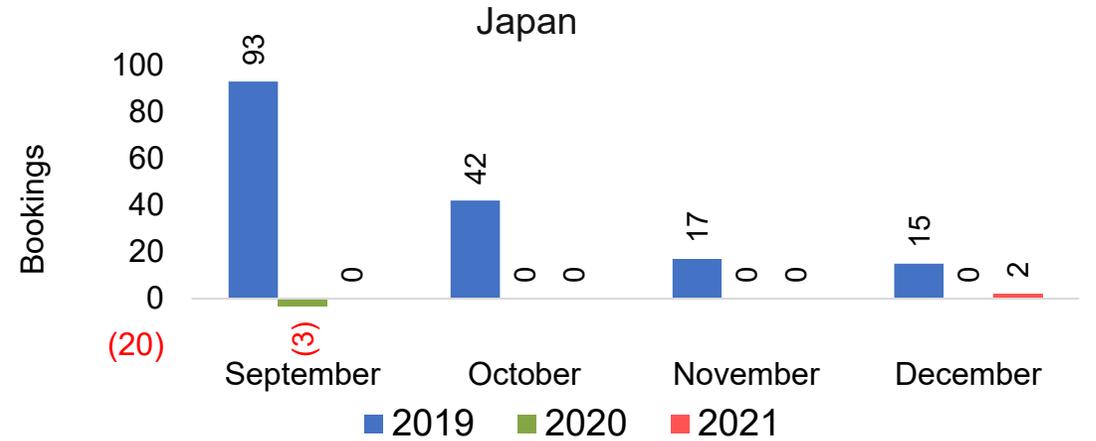
Source: Global Agency Pro as of 08/28/21

Kaua'i by Month 2021

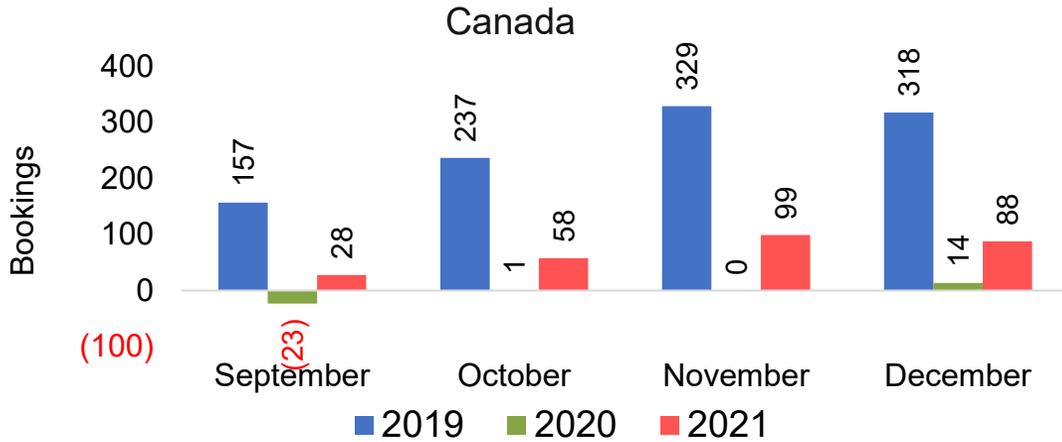
Travel Agency Booking Pickup for Future Arrivals



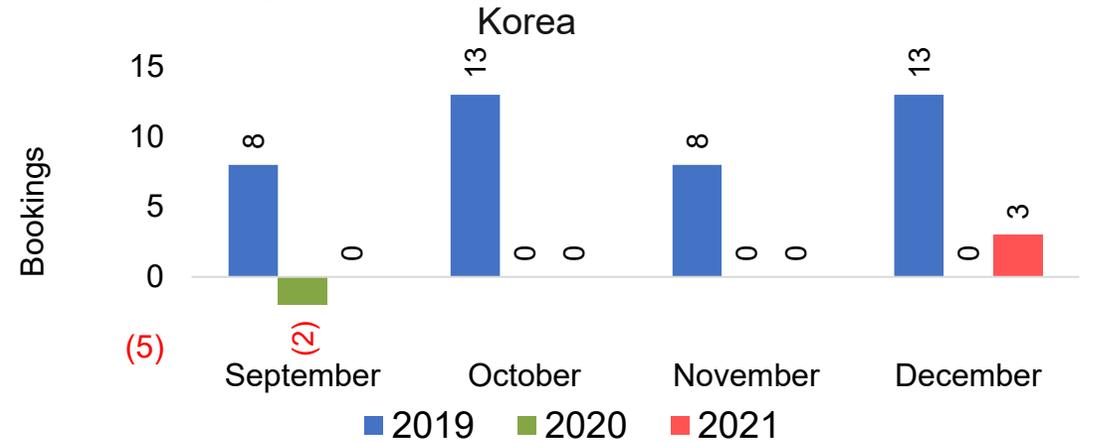
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



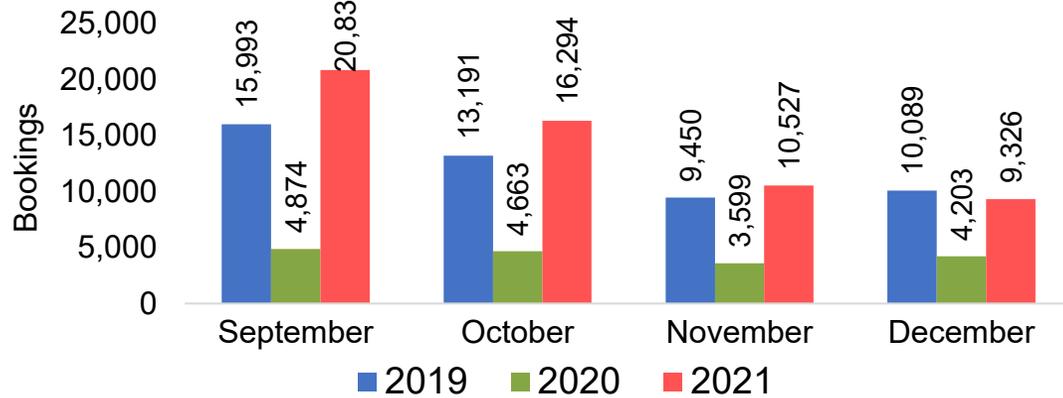
Travel Agency Booking Pickup for Future Arrivals



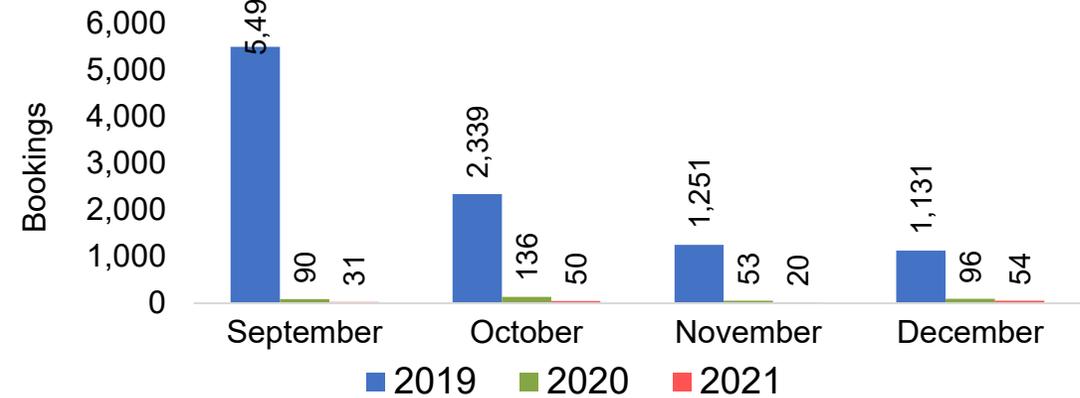
Source: Global Agency Pro as of 08/28/21

Hawai'i Island by Month 2021

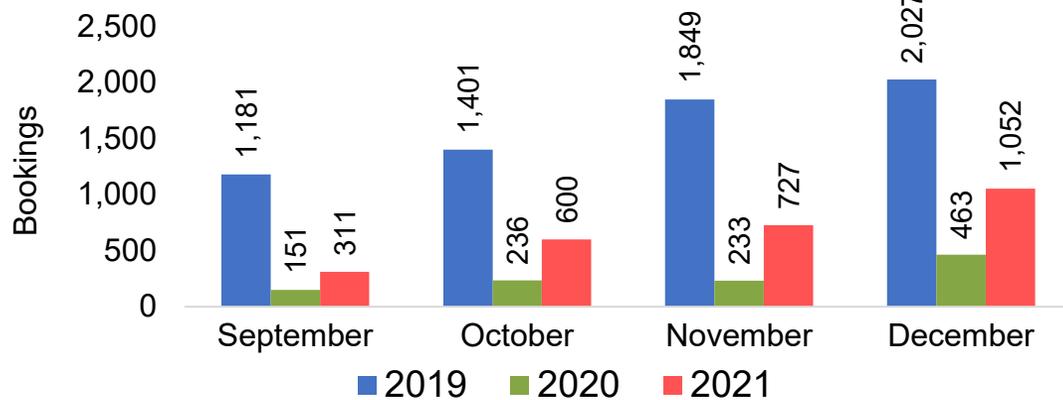
Travel Agency Booking Pace for Future Arrivals
U.S.



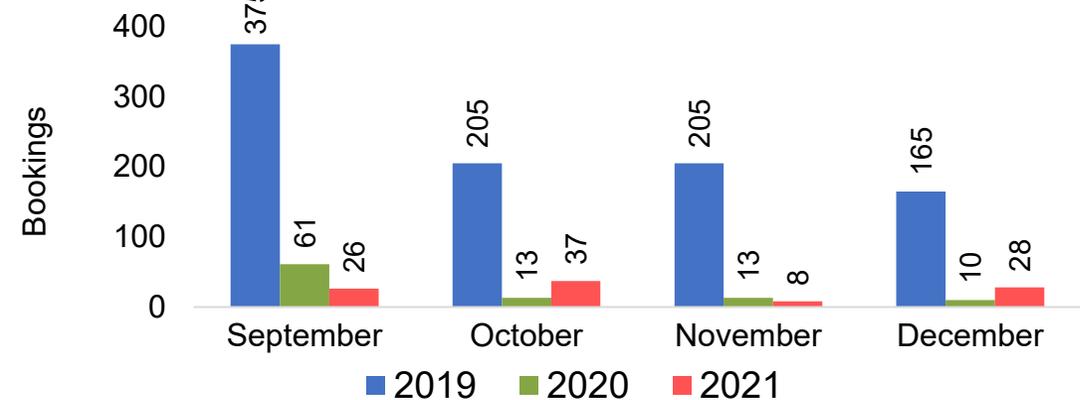
Travel Agency Booking Pace for Future Arrivals
Japan



Travel Agency Booking Pace for Future Arrivals
Canada



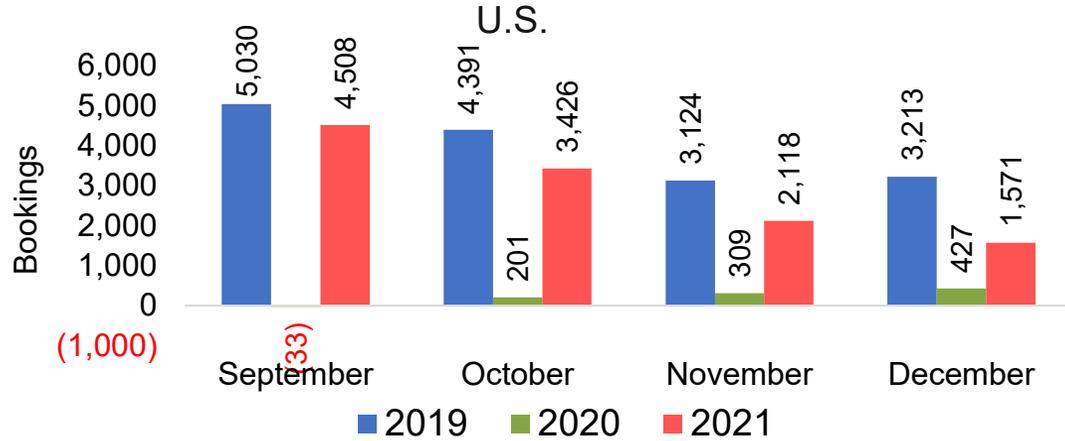
Travel Agency Booking Pace for Future Arrivals
Korea



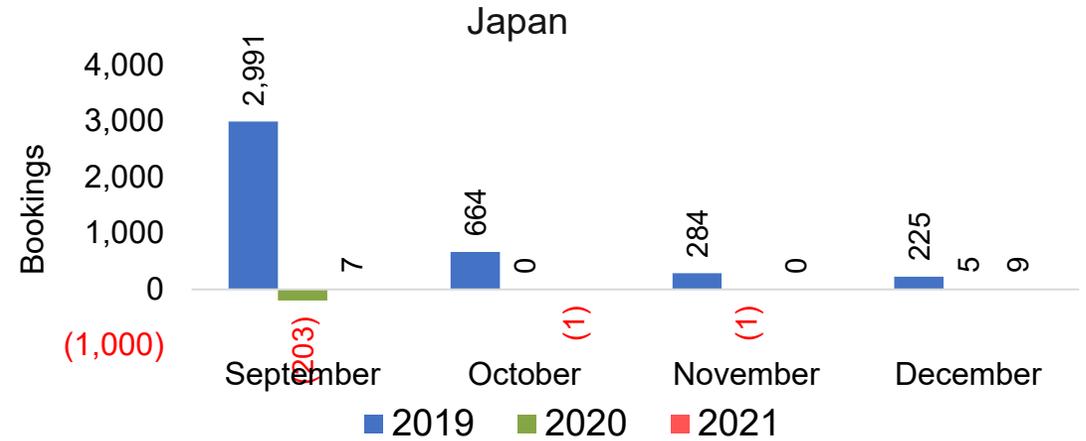
Source: Global Agency Pro as of 08/28/21

Hawai'i Island by Month 2021

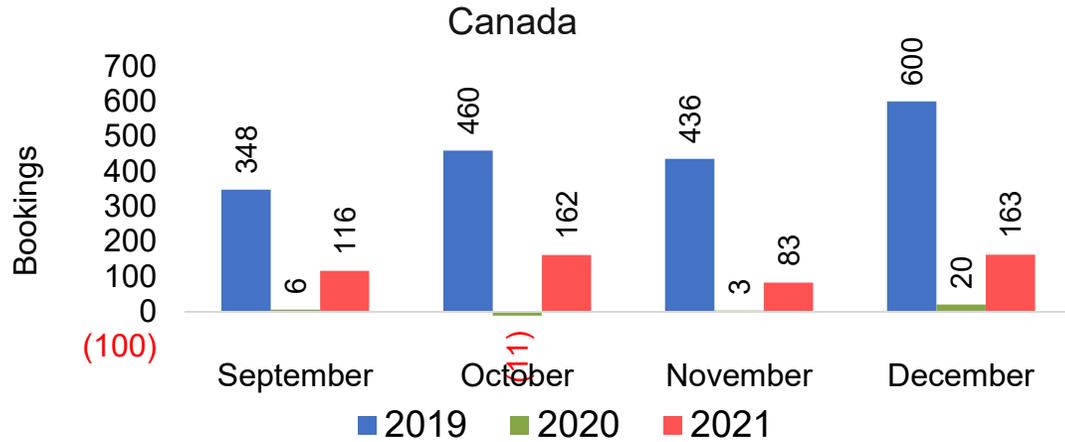
Travel Agency Booking Pickup for Future Arrivals



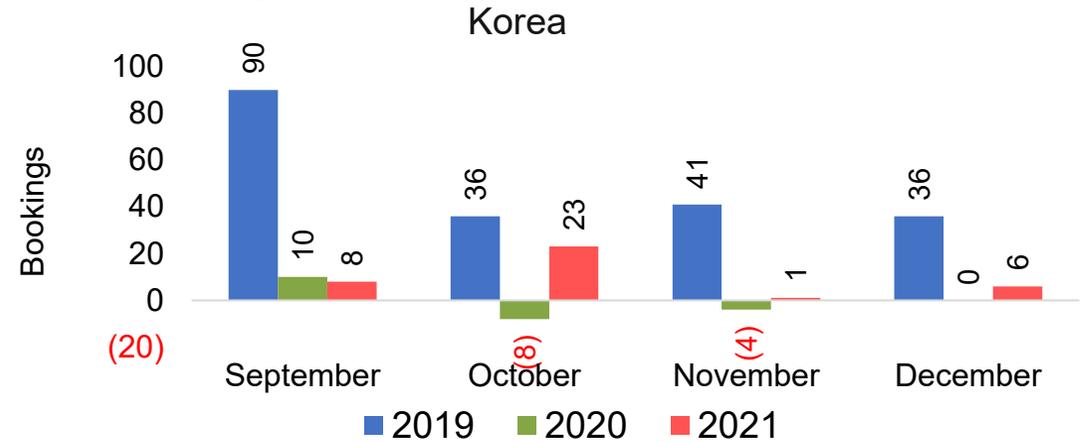
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



Source: Global Agency Pro as of 08/28/21

STR HOTEL FORECAST

STR Hotel Forecast – State of Hawai‘i

Year	Occupancy			ADR			RevPAR		
	%	Pct Point Change		\$	% Change		\$	% Change	
2017	80.2%	1.1%	▲	\$ 264.49	4.1%	▲	\$ 212.07	5.6%	▲
2018	80.3%	0.1%	▲	\$ 275.75	4.3%	▲	\$ 221.34	4.4%	▲
2019	80.8%	0.6%	▲	\$ 283.05	2.6%	▲	\$ 228.78	3.4%	▲
2020	37.1%	-43.7%	▼	\$ 267.39	-5.5%	▼	\$ 99.24	-56.6%	▼
2021F	59.2%	22.1%	▲	\$ 310.98	16.3%	▲	\$ 184.24	85.7%	▲
2022F	77.0%	17.8%	▲	\$ 293.18	-5.7%	▼	\$ 225.85	22.6%	▲

Source: STR, Inc. © Copyright 2021 Hawai‘i Tourism Authority

STR Hotel Forecast – O‘ahu

Year	Occupancy			ADR			RevPAR		
	%	Pct Point Change		\$	% Change		\$	% Change	
2017	83.5%	-0.5%	▼	\$ 233.02	2.5%	▲	\$ 194.51	1.9%	▲
2018	83.7%	0.3%	▲	\$ 236.06	1.3%	▲	\$ 197.65	1.6%	▲
2019	84.1%	0.4%	▲	\$ 240.92	2.1%	▲	\$ 202.69	2.5%	▲
2020	39.0%	-45.1%	▼	\$ 215.57	-10.5%	▼	\$ 84.04	-58.5%	▼
2021F	60.8%	21.8%	▲	\$ 217.01	0.7%	▲	\$ 131.91	57.0%	▲
2022F	75.1%	14.3%	▲	\$ 219.96	1.4%	▲	\$ 165.22	25.3%	▲

Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority

STR Hotel Forecast – Maui County

Year	Occupancy			ADR			RevPAR		
	%	Pct Point Change		\$	% Change		\$	% Change	
2017	77.0%	1.2%	▲	\$ 353.64	7.3%	▲	\$ 272.35	8.9%	▲
2018	75.9%	-1.1%	▼	\$ 386.14	9.2%	▲	\$ 293.22	7.7%	▲
2019	77.7%	1.8%	▲	\$ 401.10	3.9%	▲	\$ 311.61	6.3%	▲
2020	33.9%	-43.8%	▼	\$ 414.26	3.3%	▲	\$ 140.42	-54.9%	▼
2021F	61.4%	27.5%	▲	\$ 493.30	19.1%	▲	\$ 302.96	115.8%	▲
2022F	72.3%	10.9%	▲	\$ 435.75	-11.7%	▼	\$ 314.97	4.0%	▲

Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority

STR Hotel Forecast – Island of Hawai‘i

Year	Occupancy			ADR			RevPAR		
	%	Pct Point Change		\$	% Change		\$	% Change	
2017	74.8%	6.1%	▲	\$ 249.04	3.1%	▲	\$ 186.34	12.3%	▲
2018	74.6%	-0.2%	▼	\$ 258.26	3.7%	▲	\$ 192.66	3.4%	▲
2019	77.0%	2.4%	▲	\$ 265.44	2.8%	▲	\$ 204.50	6.1%	▲
2020	38.0%	-39.0%	▼	\$ 254.27	-4.2%	▼	\$ 96.71	-52.7%	▼
2021F	60.1%	22.0%	▲	\$ 335.20	31.8%	▲	\$ 201.36	108.2%	▲
2022F	72.1%	12.0%	▲	\$ 296.11	-11.7%	▼	\$ 213.44	6.0%	▲

Source: STR, Inc. © Copyright 2021 Hawai‘i Tourism Authority

STR Hotel Forecast – Kaua‘i

Year	Occupancy			ADR			RevPAR		
	%	Pct Point Change		\$	% Change		\$	% Change	
2017	75.7%	3.0%	▲	\$ 263.87	4.2%	▲	\$ 199.78	8.5%	▲
2018	77.5%	1.8%	▲	\$ 288.02	9.2%	▲	\$ 223.36	11.8%	▲
2019	72.8%	-4.8%	▼	\$ 282.67	-1.9%	▼	\$ 205.65	-7.9%	▼
2020	33.0%	-39.7%	▼	\$ 261.98	-7.3%	▼	\$ 86.50	-57.9%	▼
2021F	54.8%	21.7%	▲	\$ 302.39	15.4%	▲	\$ 165.56	91.4%	▲
2022F	73.8%	19.1%	▲	\$ 288.12	-4.7%	▼	\$ 212.67	28.5%	▲

Source: STR, Inc. © Copyright 2021 Hawai‘i Tourism Authority

SYMPHONY DASHBOARD

Month
July 2021

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

879.6K ▼ -11.6%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

\$1,580.7M ▼ -6.8%

Average Length of Stay

All visitors, July 2021

9.4 Days

Top-10 International Markets

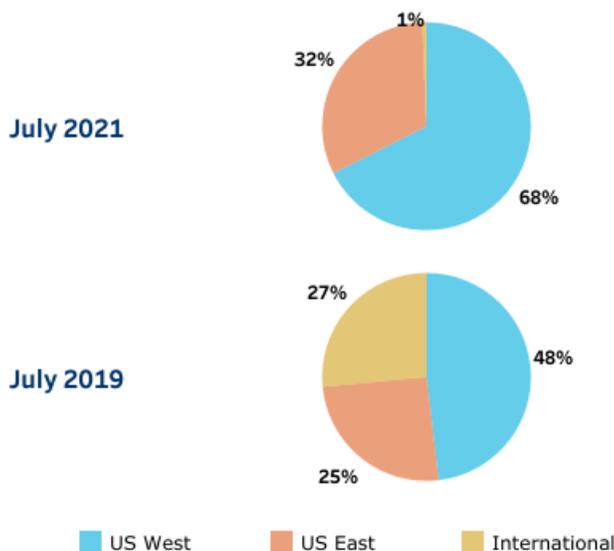
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)

Japan	▼ -97.9%	2,817
Other Asia	▼ -93.3%	2,073
Canada	▼ -92.6%	1,999
Europe	▼ -92.5%	1,203
Korea	▼ -94.2%	1,108
Mexico	▼ -45.7%	897
United Kingdom	▼ -85.8%	638
China	▼ -94.8%	447
Oceania	▼ -99.1%	352
Hong Kong	▼ -52.7%	274

Source: Hawaii Tourism Authority

Market Share by Origin Markets

% share of total visitors



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)

California	▲ 27.5%	396,034
Texas	▲ 30.9%	59,347
Washington	▲ 17.2%	51,981
Arizona	▲ 42.3%	33,599
Colorado	▲ 34.5%	23,952
Florida	▲ 41.2%	21,977
Oregon	▲ 8.5%	21,315
Nevada	▲ 45.5%	18,945
Illinois	▲ 27.0%	18,835
New York	▲ 18.6%	18,515

Source: Hawaii Tourism Authority

Top-30 Points of Interest Visited

Ranked by most visited POI by visitors, % share of visits by residents and visitors in July 2021

POI	Island	Residents	Visitors
Kalakaua Avenue	Oahu	45%	55%
Lahaina Bypass	Maui Island	48%	52%
Kailua town and beach	Oahu	80%	20%
Kapahulu Avenue	Oahu	62%	38%
Kapiolani Park	Oahu	56%	44%
Royal Hawaiian Shopping Center	Oahu	40%	60%
Front Street in Lahaina	Maui Island	42%	58%
Ala Moana Shopping Center	Oahu	76%	24%
Upcountry Maui	Maui Island	85%	15%
Honolulu Watershed Forest Reserve	Oahu	77%	23%
Ko Olina Resort	Oahu	43%	57%
Chinatown	Oahu	89%	11%
International Marketplace	Oahu	42%	58%
Kailua-Kona Town	Hawaii Island	49%	51%
Whalers Village Shopping Center	Maui Island	34%	66%
Kahului Airport Car Rental location	Maui Island	36%	64%
Hana/Road to Hana	Maui Island	55%	45%
Lahaina Cannery Mall	Maui Island	47%	53%
Kaanapali Kai Golf Course	Maui Island	41%	59%
Lahaina Market Place Shopping Center	Maui Island	36%	64%
Paia Town	Maui Island	51%	49%
Kuhio Beach Park	Oahu	33%	67%
Waikiki Beach	Oahu	31%	69%
Fort DeRussy Beach Park	Oahu	30%	70%
Pearl Harbor National Memorial	Oahu	25%	75%
Kahana Valley State Park	Oahu	58%	42%
Ahupuaa O Kahana State Park	Oahu	58%	42%
Honolulu Zoo	Oahu	50%	50%
Azeka Shopping Center	Maui Island	59%	41%
The Shops at Wailea	Maui Island	42%	58%

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

Source: near (formerly UberMedia)

Month
July 2021

Island
Oahu

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

453.7K ▼ -24.3%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

\$666.3M ▼ -11.1%

Average Length of Stay

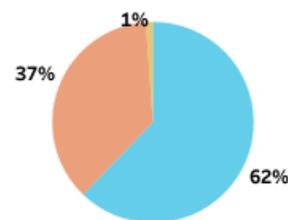
All visitors, July 2021

7.8 Days

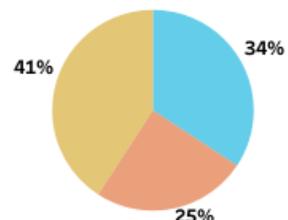
Origin Market Share

% share of visitors

July 2021



July 2019

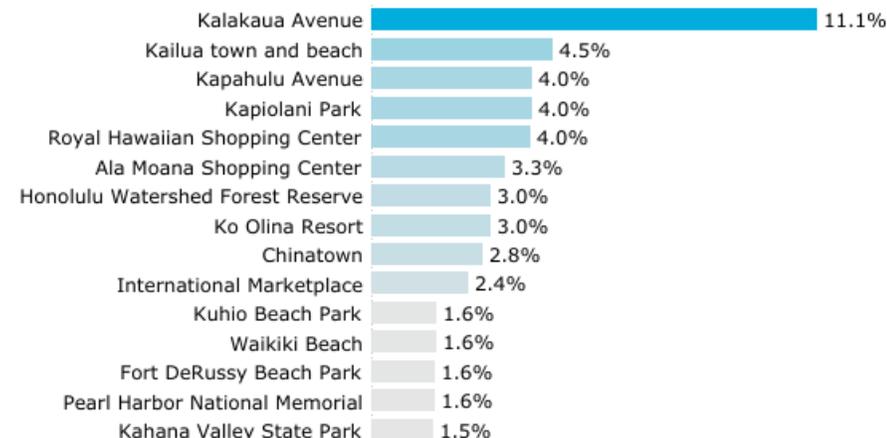


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

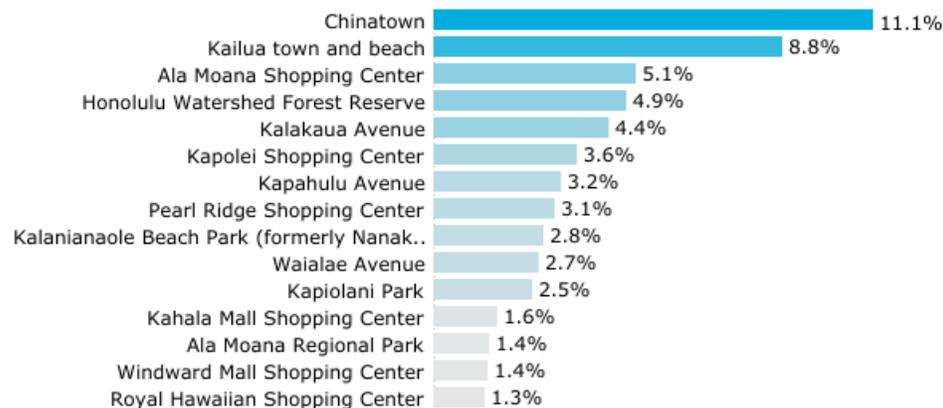
% share of visits, July 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, July 2021

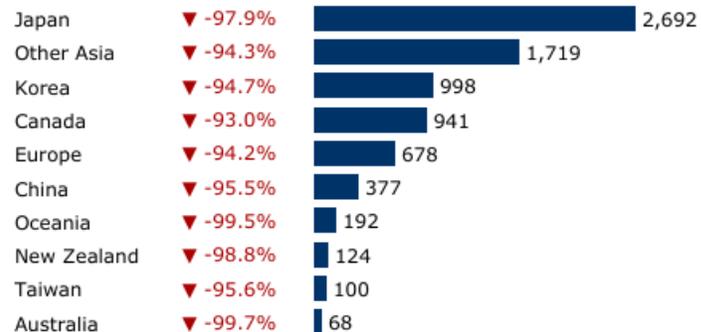


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

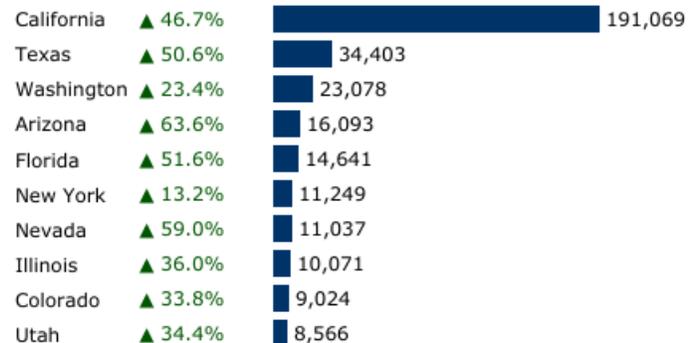
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



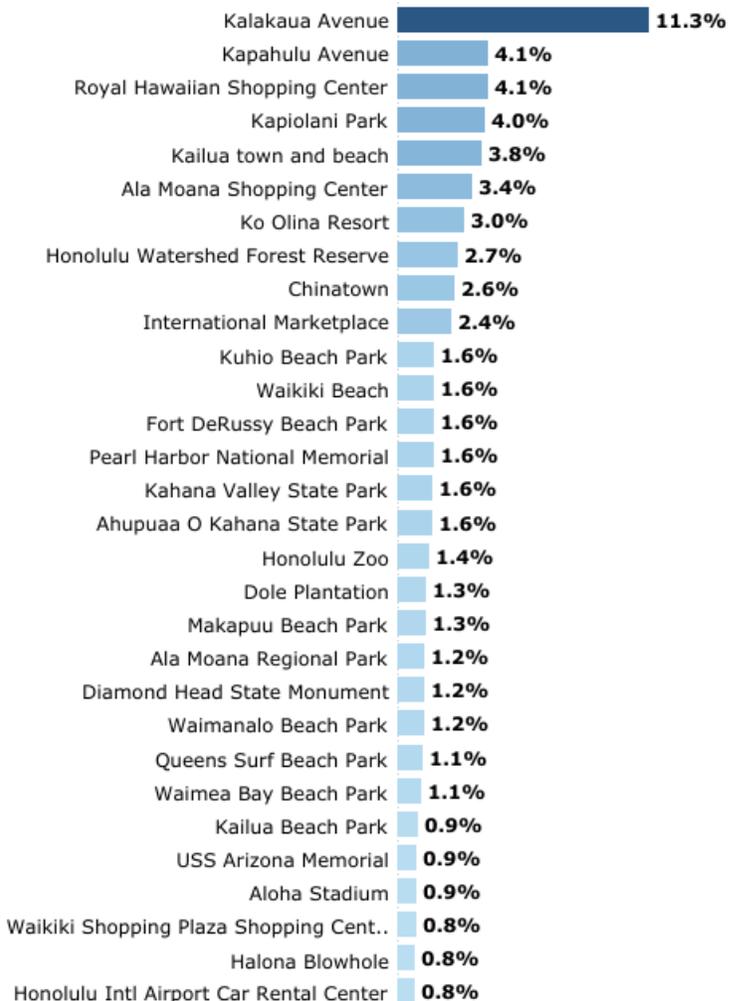
Source: Hawaii Tourism Authority

Island: Oahu | From Date: 01-Jul-21 | To Date: 31-Jul-21 | Origin Country: All | Origin State Name: All

Visitors | Residents

Top-30 Points of Interest on Oahu

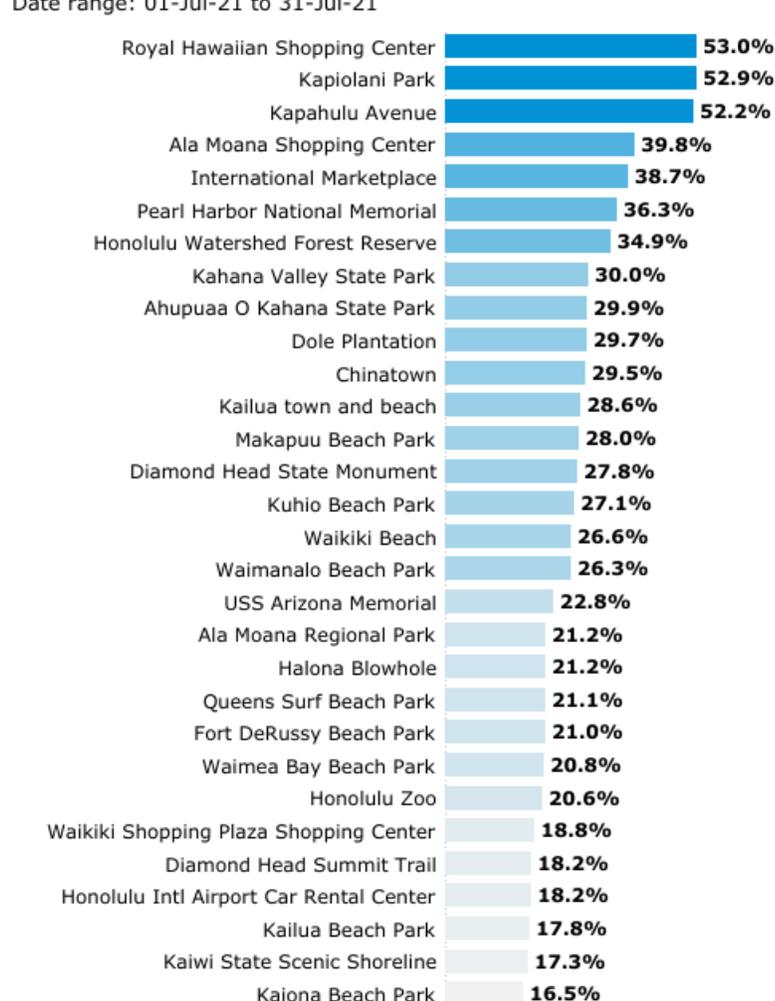
% share of visits by visitors to Oahu
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Oahu

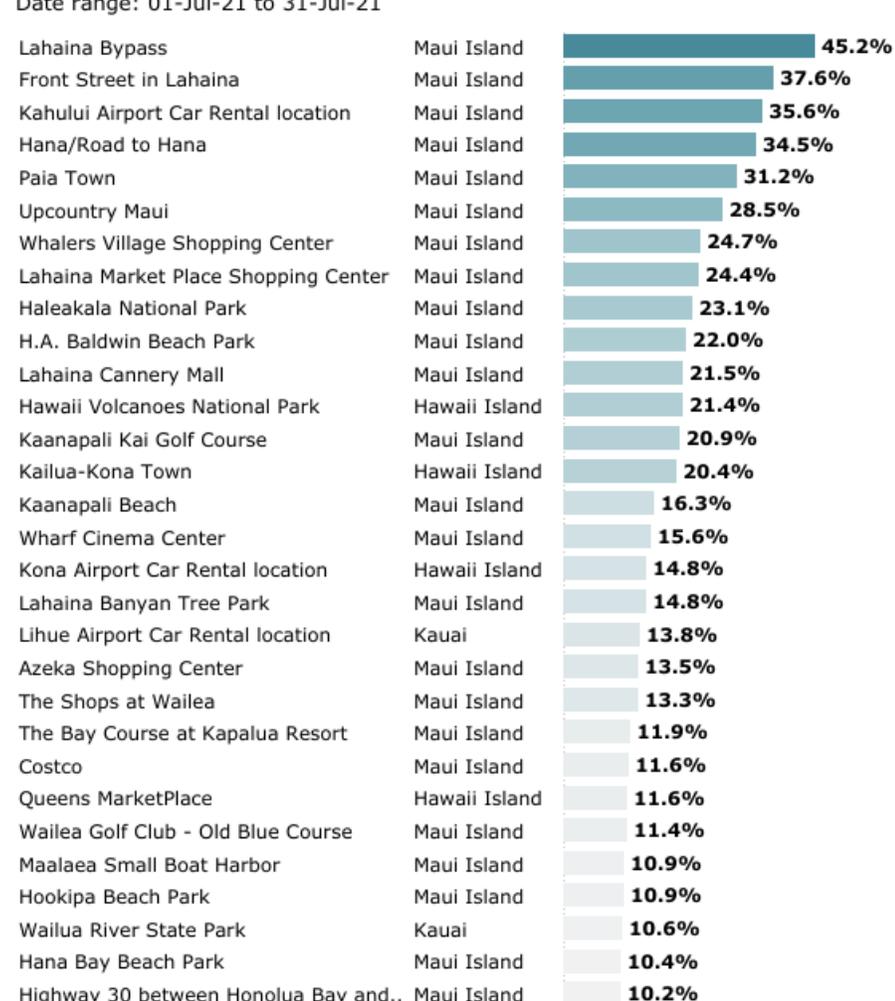
% share of visitors to Oahu going to Kalakaua Avenue that also visited other POIs
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Other Islands

% share of visitors to Oahu who went to Kalakaua Avenue that also visited other islands
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

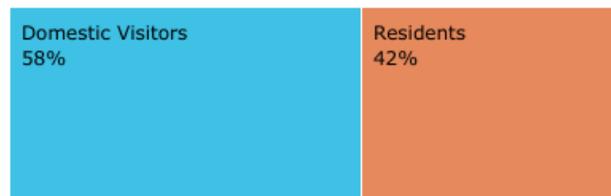
POI Visitation Summary

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

From 01-Jul-21 To 31-Jul-21 Island Oahu POI Category All POI Name Laniakea Beach

Visitors by Origin

Unique visitors



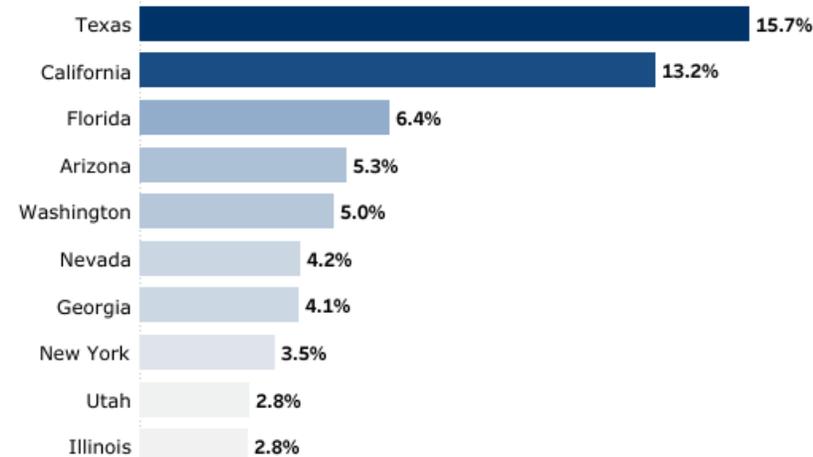
State Residents

Unique visitors, % share of total residents



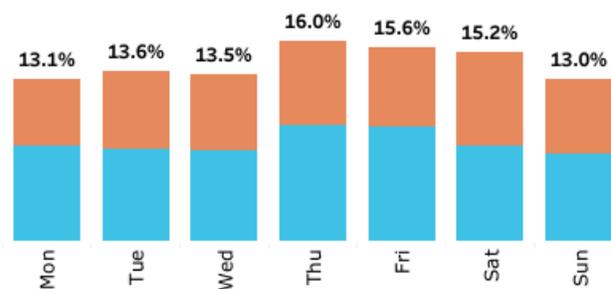
Top-10 Origin States for Domestic Visitors

Unique visitors, % share of total domestic



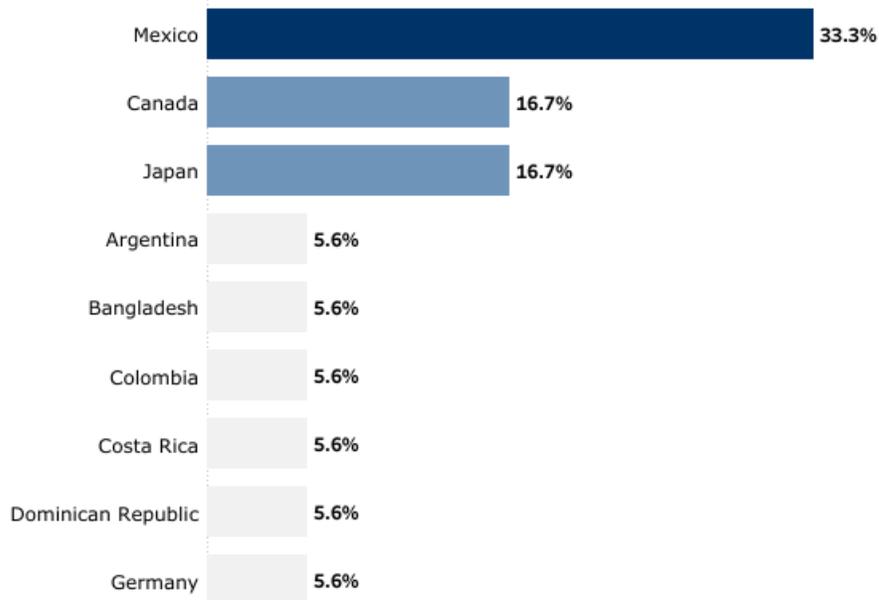
Visits by Day of Week

% share of visits by DOW



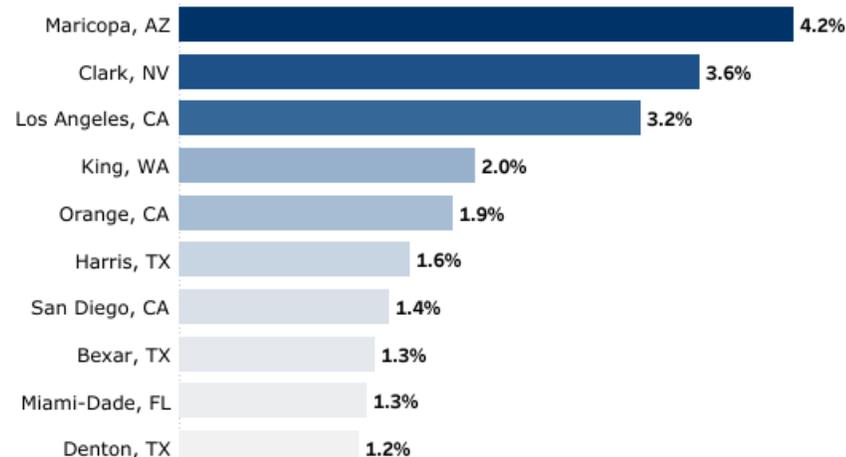
Top-10 Origin Countries for International Visitors

Unique visitors, % share of total international



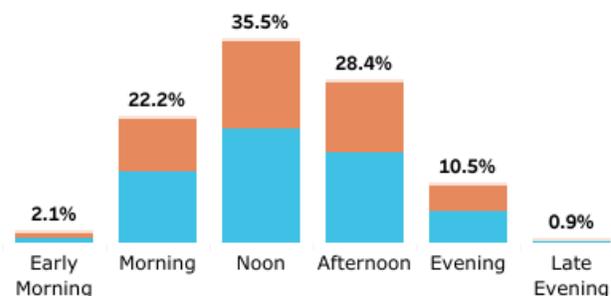
Top-10 Origin Counties for Domestic Visitors

Unique visitors, % share of total domestic



Visits by Time of Day

% share of visits by time of arrival



Month
July 2021

Island
Maui Island

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

282.7K ▼ -8.2%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

\$487.9M ▼ -3.6%

Average Length of Stay

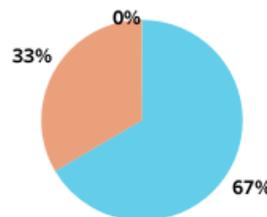
All visitors, July 2021

8.4 Days

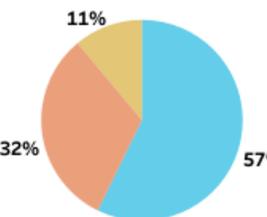
Origin Market Share

% share of visitors

July 2021



July 2019

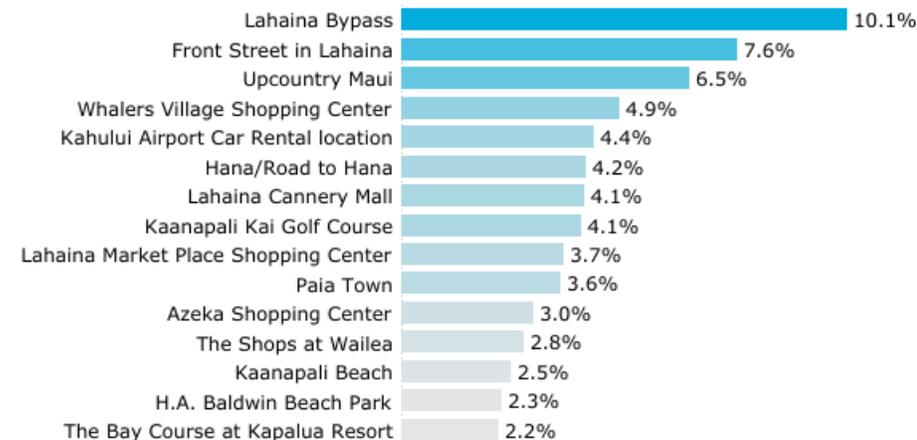


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

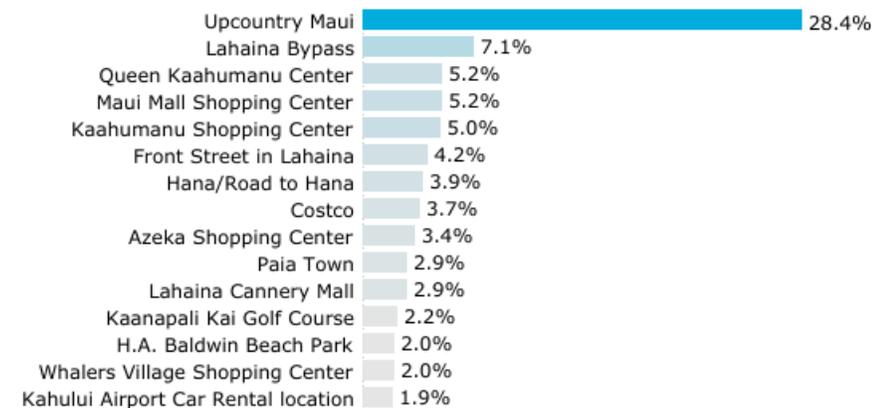
% share of visits, July 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, July 2021

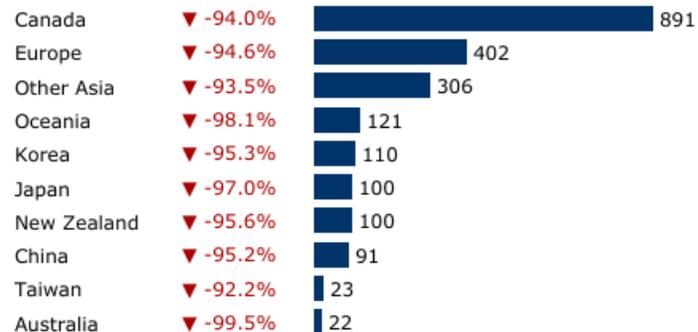


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

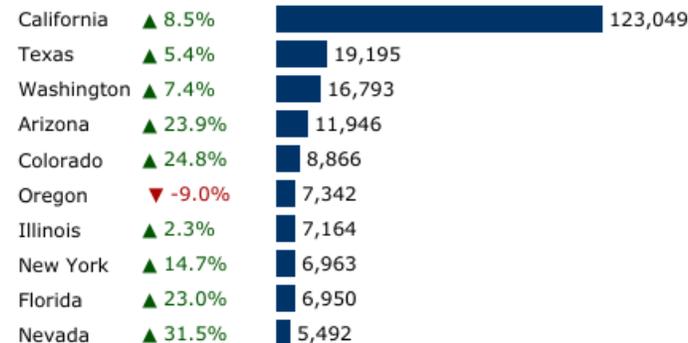
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Maui Island Visitation Insights for Visitors

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

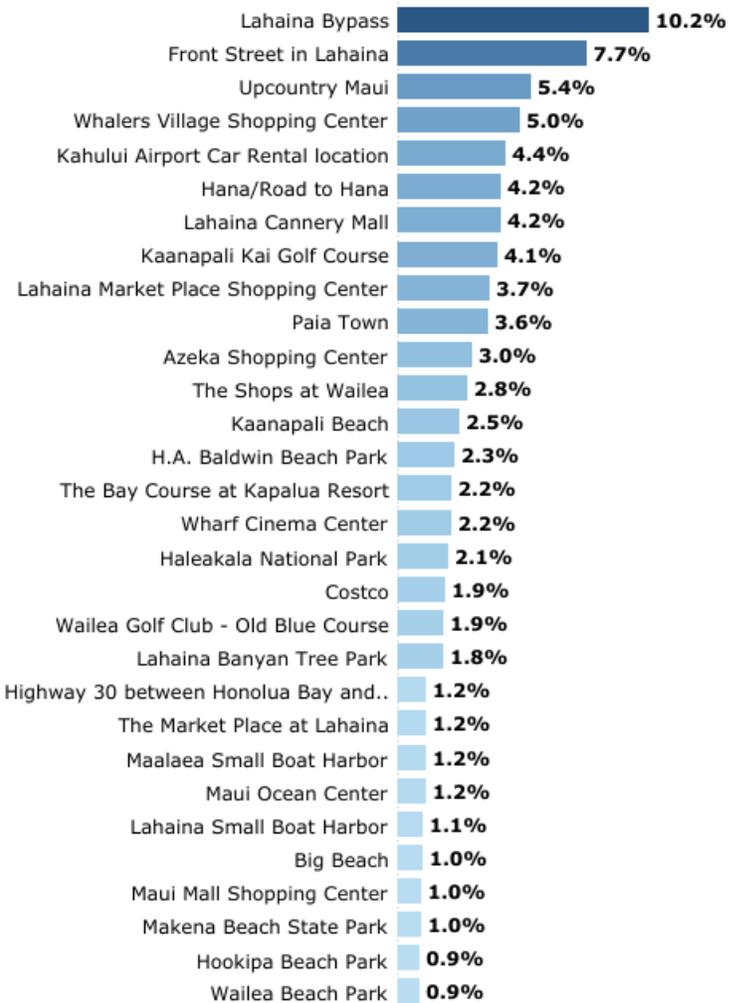
Island: Maui Island | From Date: 01-Jul-21 | To Date: 31-Jul-21 | Origin Country: All | Origin State Name: All

Visitors

Residents

Top-30 Points of Interest on Maui Island

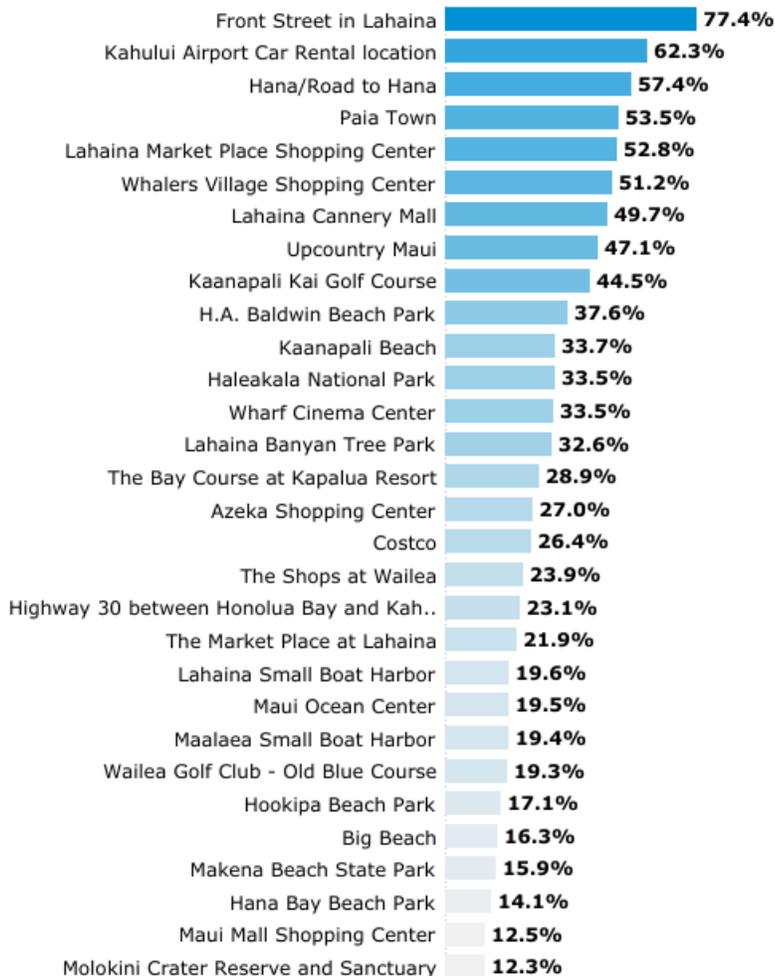
% share of visits by visitors to Maui Island
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Maui Island

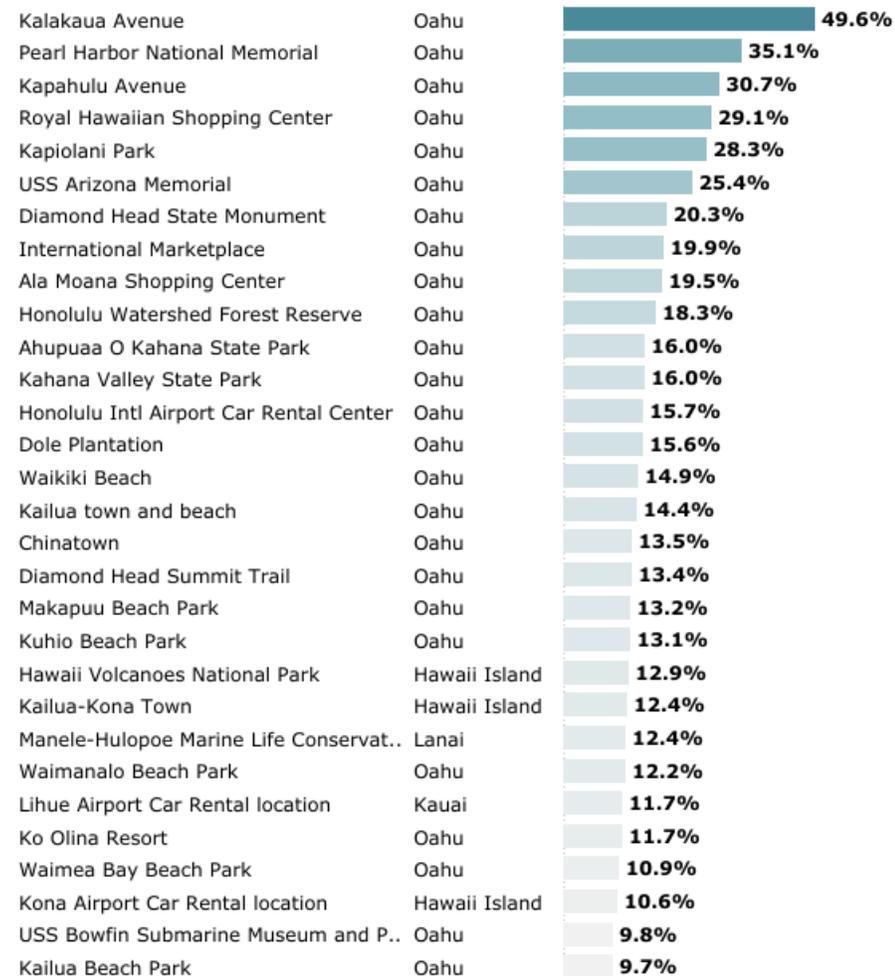
% share of visitors to Maui Island going to Lahaina Bypass that also visited other POIs
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Other Islands

% share of visitors to Maui Island who went to Lahaina Bypass that also visited other islands
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

POI Visitation Summary

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

From 01-Jul-21 To 31-Jul-21
 Island Maui Island POI Category All POI Name Hana/Road to Hana

Visitors by Origin

Unique visitors



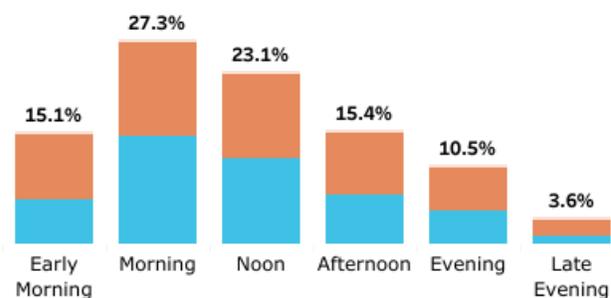
Visits by Day of Week

% share of visits by DOW



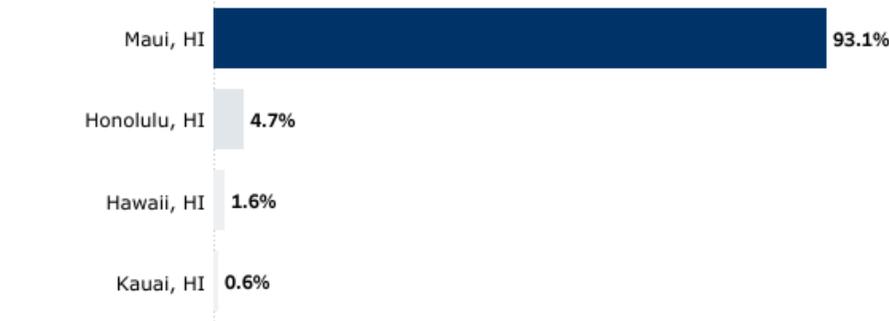
Visits by Time of Day

% share of visits by time of arrival



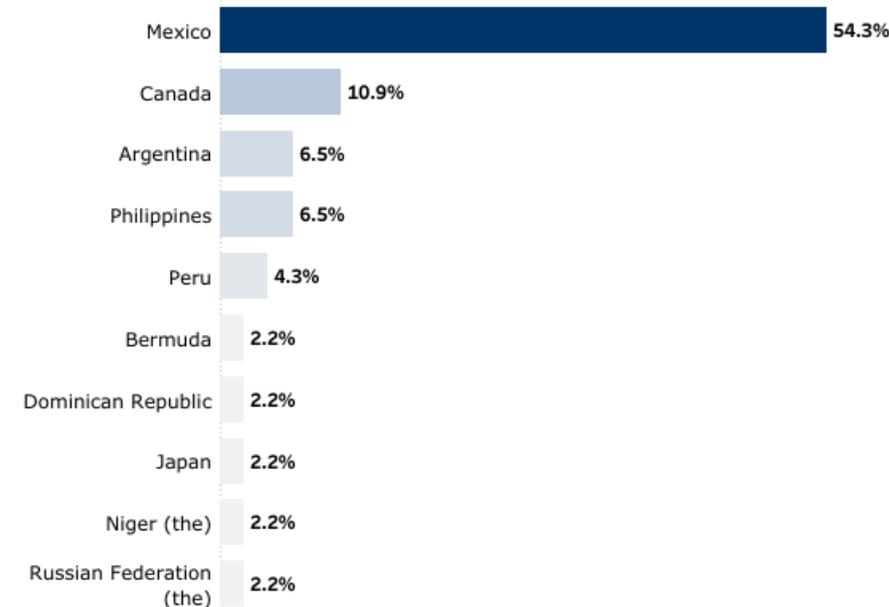
State Residents

Unique visitors, % share of total residents



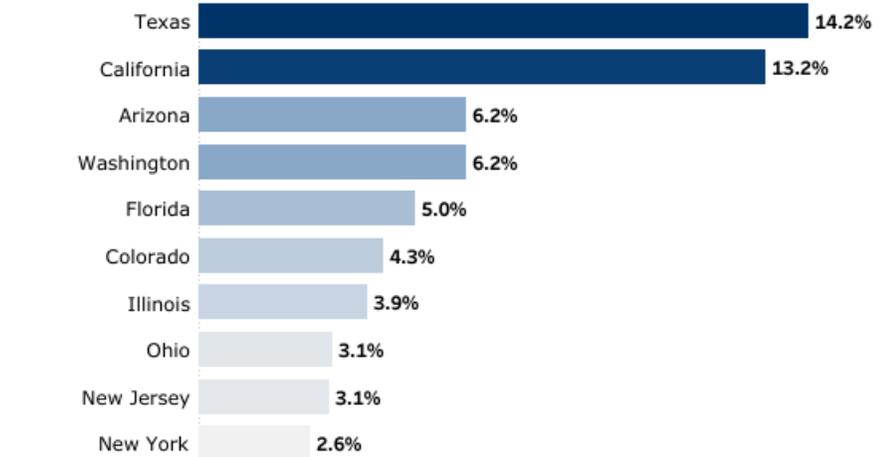
Top-10 Origin Countries for International Visitors

Unique visitors, % share of total international



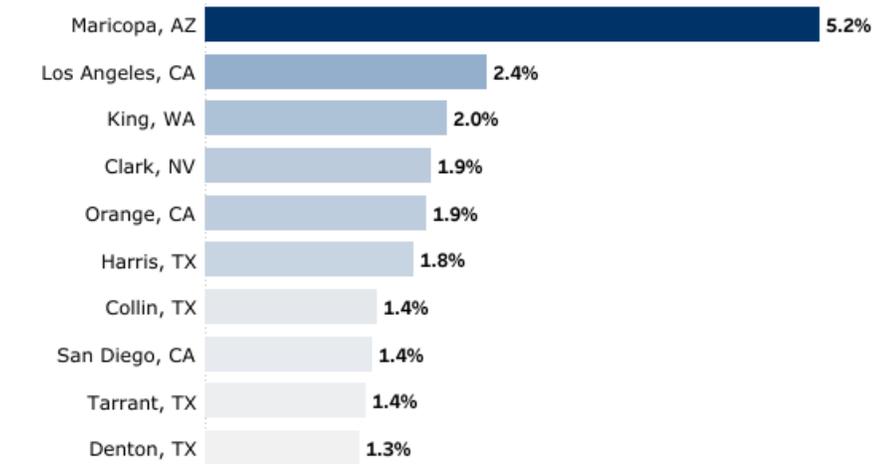
Top-10 Origin States for Domestic Visitors

Unique visitors, % share of total domestic



Top-10 Origin Counties for Domestic Visitors

Unique visitors, % share of total domestic



Month
July 2021

Island
Hawaii Island

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

149.4K ▼ -14.1%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

\$220.3M ▼ -0.5%

Average Length of Stay

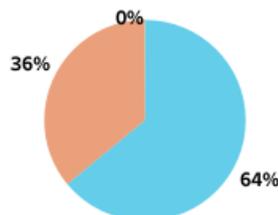
All visitors, July 2021

8.6 Days

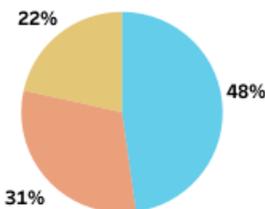
Origin Market Share

% share of visitors

July 2021



July 2019

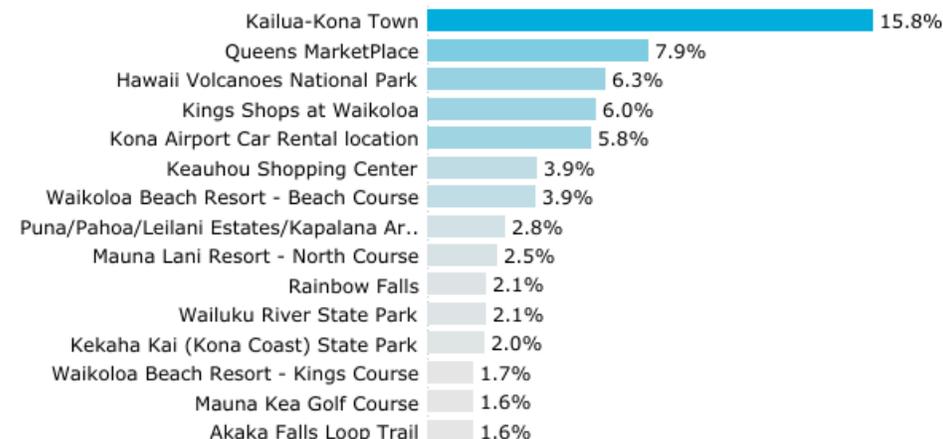


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

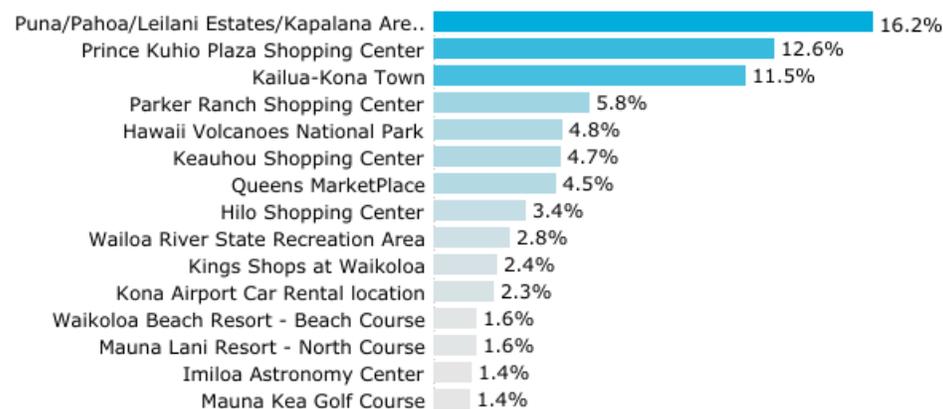
% share of visits, July 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, July 2021

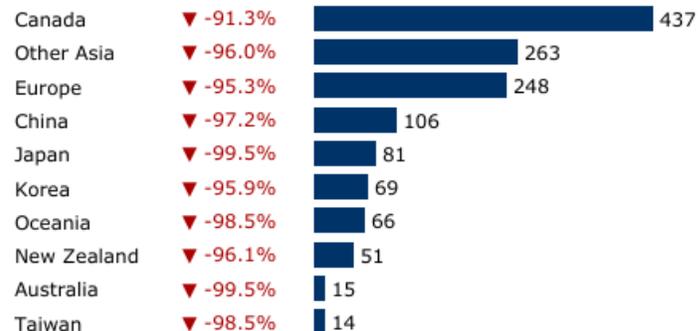


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

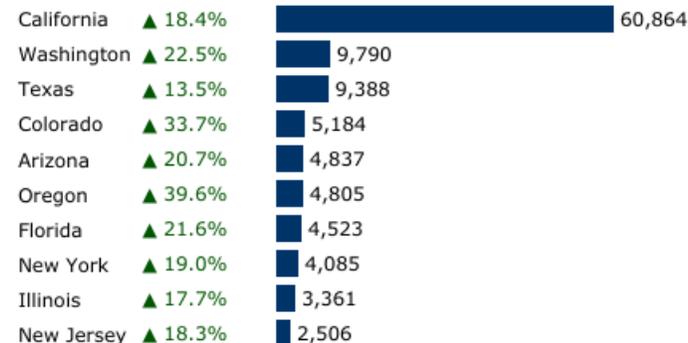
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Hawaii Island Visitation Insights for Visitors

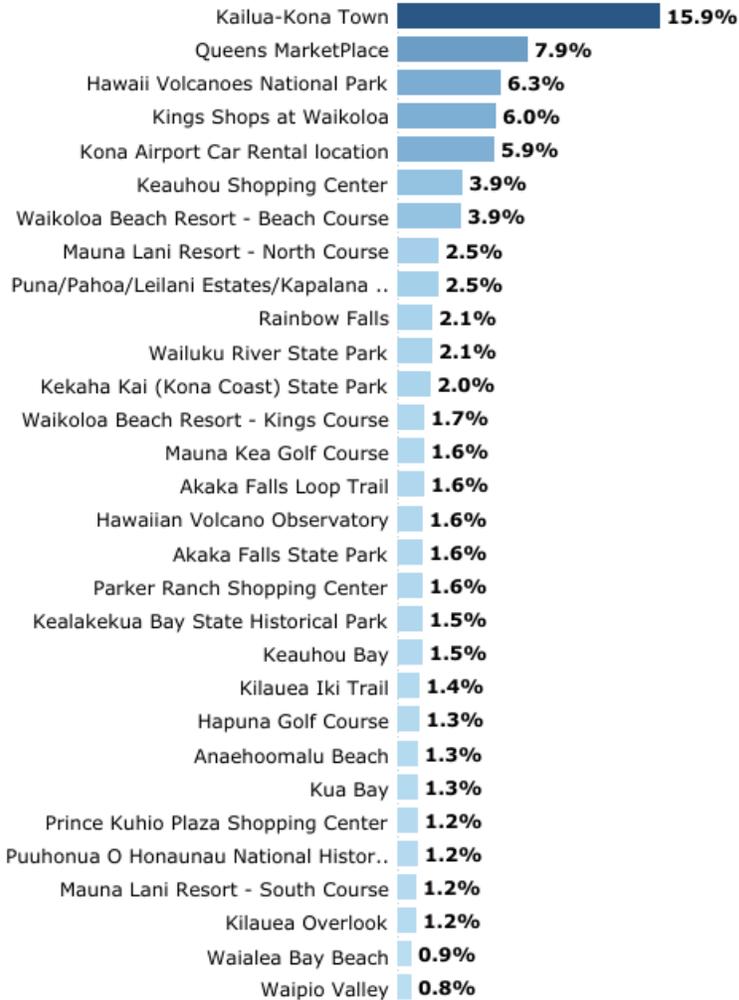
Date Range: 01-Jul-21 to 31-Jul-21

Island	From Date	To Date	Origin Country	Origin State Name
Hawaii Island	01-Jul-21	31-Jul-21	All	All

Visitors	Residents
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Top-30 Points of Interest on Hawaii Island

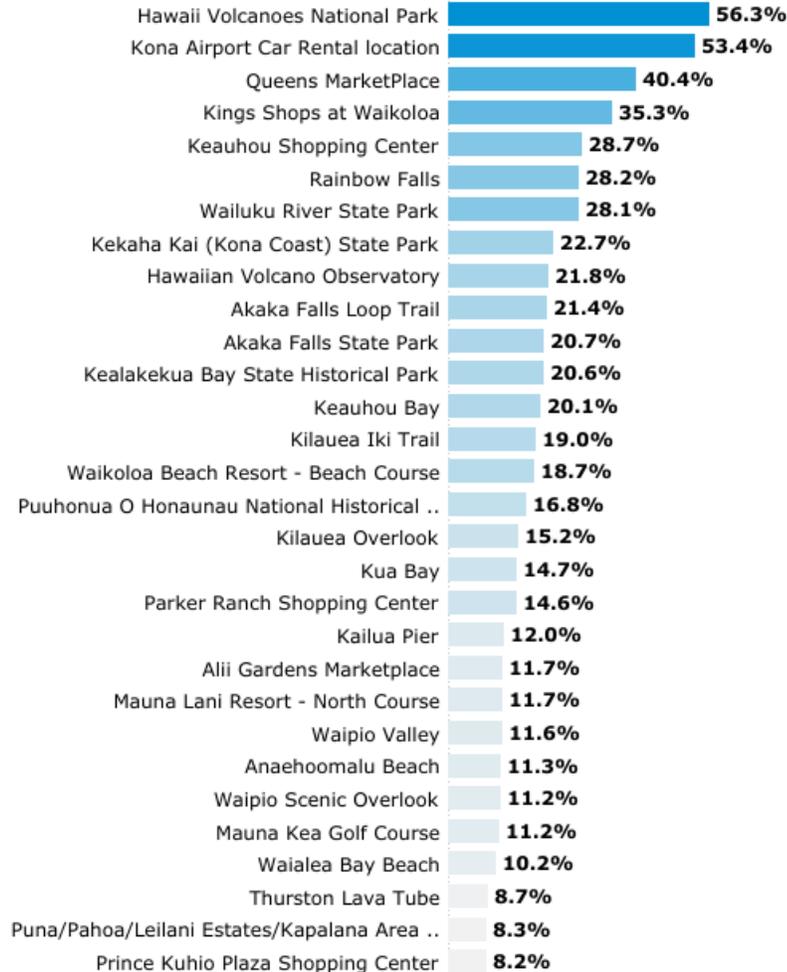
% share of visits by visitors to Hawaii Island
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Hawaii Island

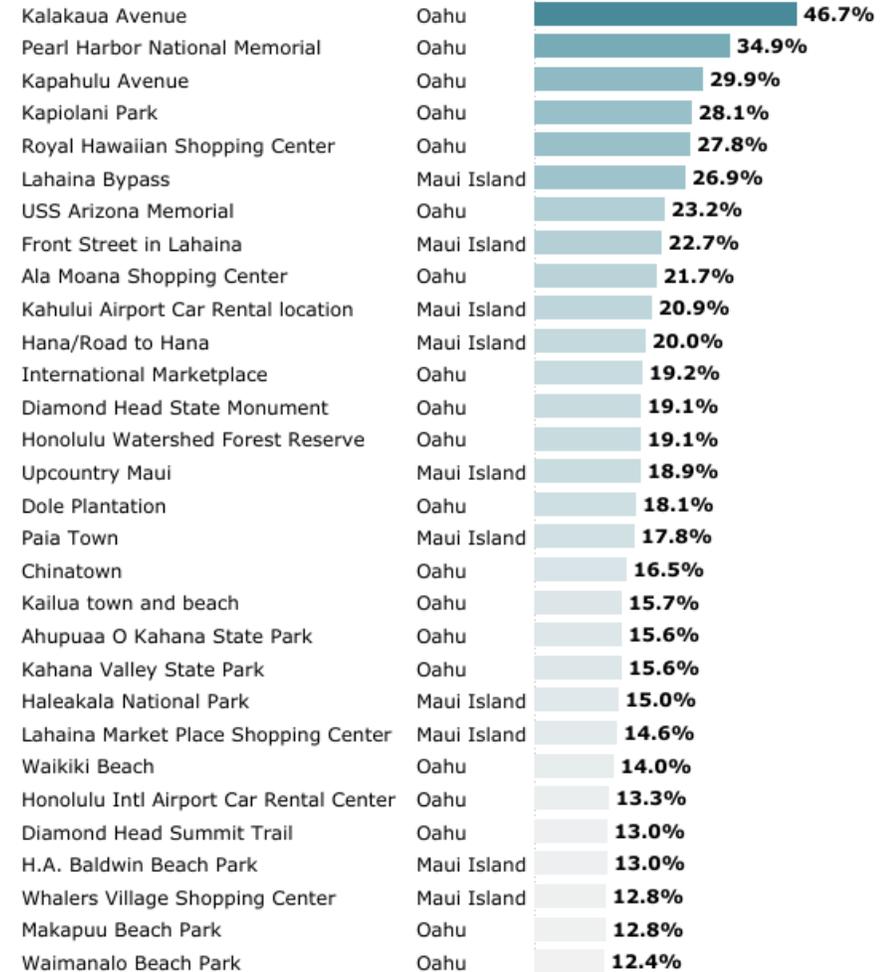
% share of visitors to Hawaii Island going to Kailua-Kona Town that also visited other POIs
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Other Islands

% share of visitors to Hawaii Island who went to Kailua-Kona Town that also visited other islands
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

POI Visitation Summary

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

From 01-Jul-21 To 31-Jul-21 Island Hawaii Island POI Category All POI Name Waipio Valley

Visitors by Origin

Unique visitors



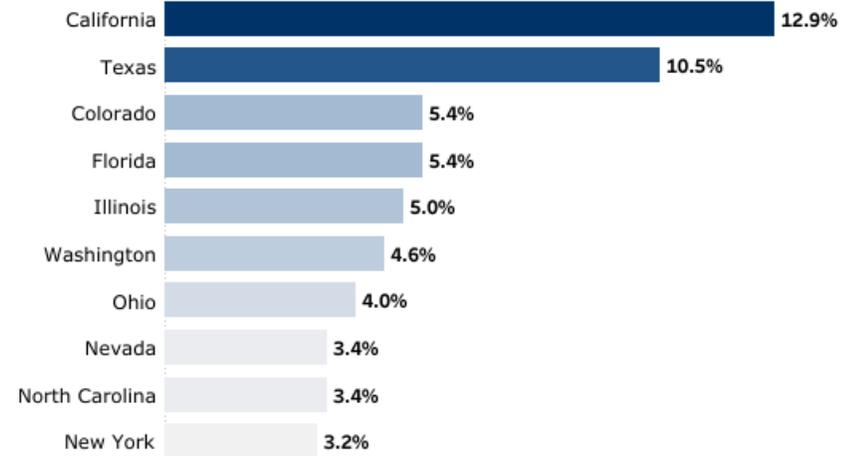
State Residents

Unique visitors, % share of total residents



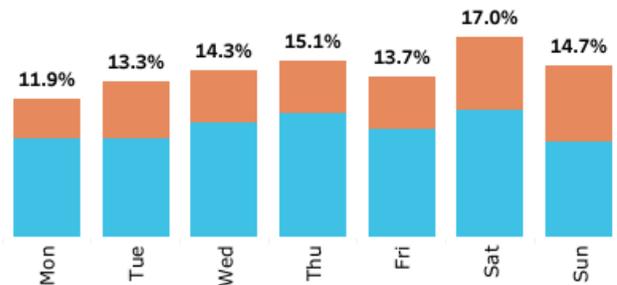
Top-10 Origin States for Domestic Visitors

Unique visitors, % share of total domestic



Visits by Day of Week

% share of visits by DOW



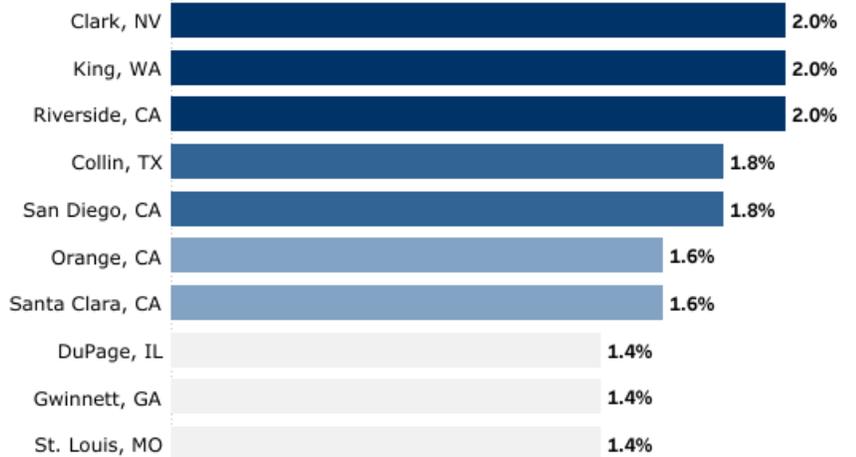
Top-10 Origin Countries for International Visitors

Unique visitors, % share of total international



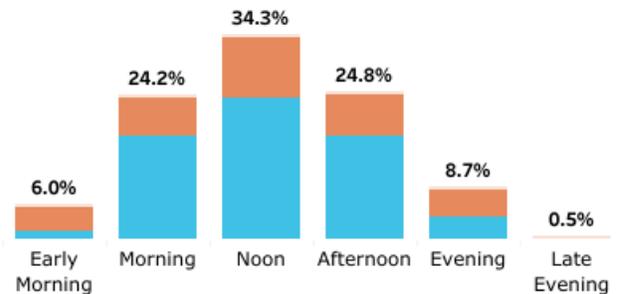
Top-10 Origin Counties for Domestic Visitors

Unique visitors, % share of total domestic



Visits by Time of Day

% share of visits by time of arrival



Month
July 2021

Island
Kauai

State of Hawaii | **Island Summary** | Lodging Summary

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

115.9K ▼ -16.7%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

\$189.5M ▼ -5.9%

Average Length of Stay

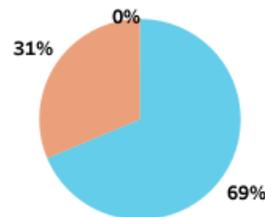
All visitors, July 2021

8.5 Days

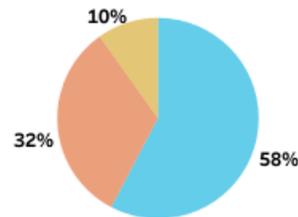
Origin Market Share

% share of visitors

July 2021



July 2019

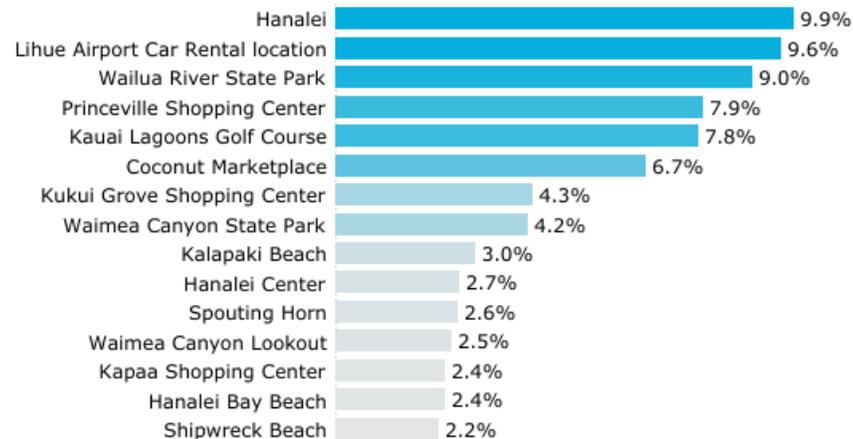


US West | US East | International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

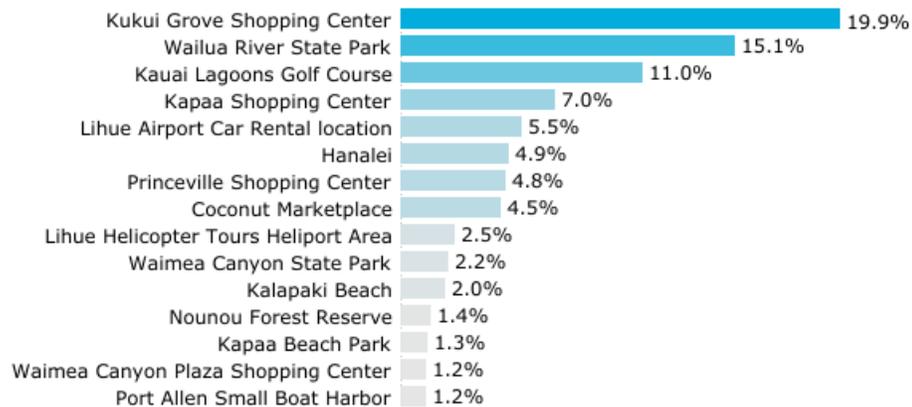
% share of visits, July 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, July 2021

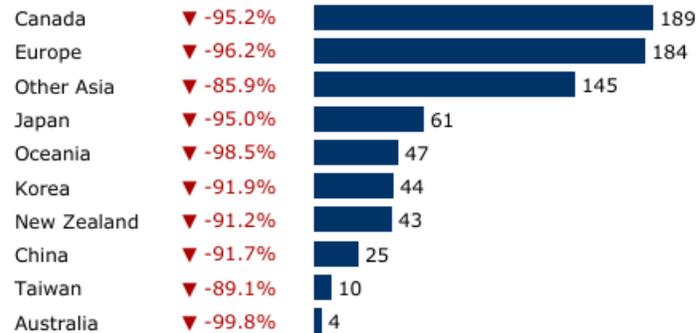


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

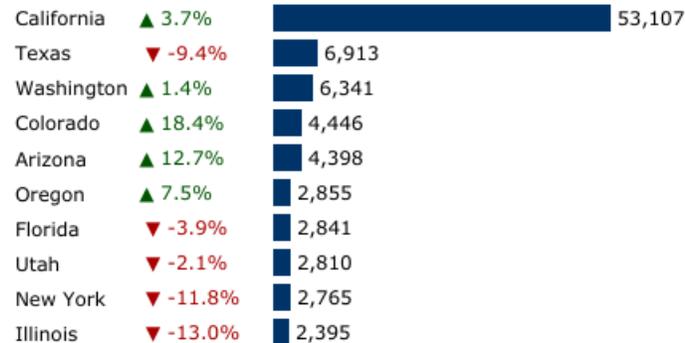
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Kauai Visitation Insights for Visitors

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

Island: Kauai
From Date: 01-Jul-21
To Date: 31-Jul-21

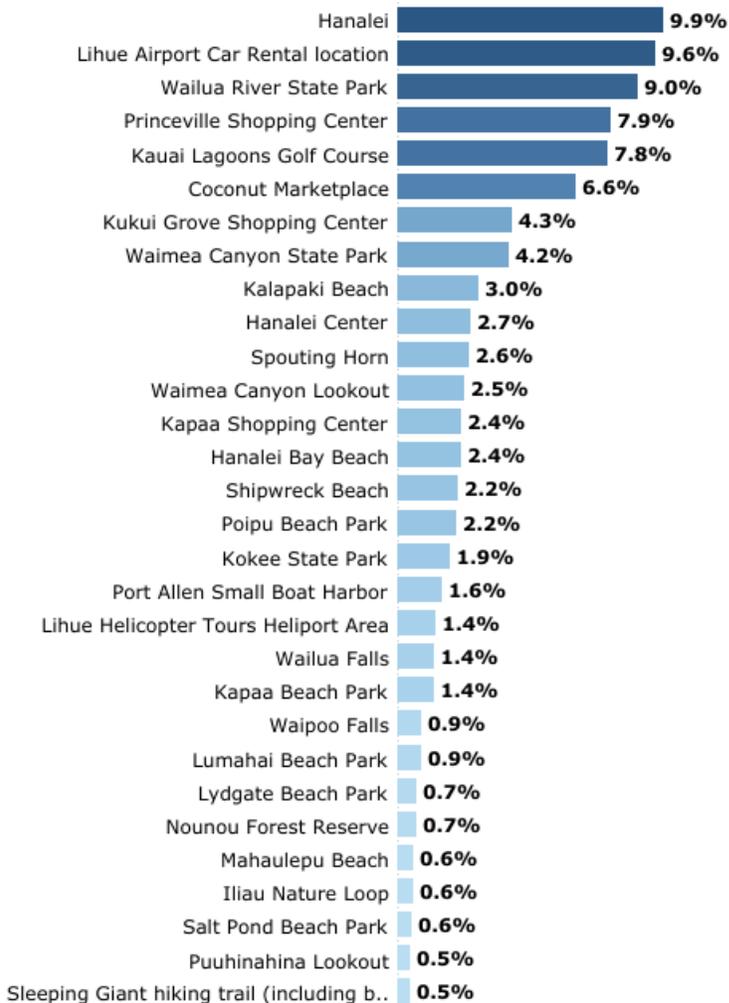
Origin Country: All
Origin State Name: All

Visitors

Residents

Top-30 Points of Interest on Kauai

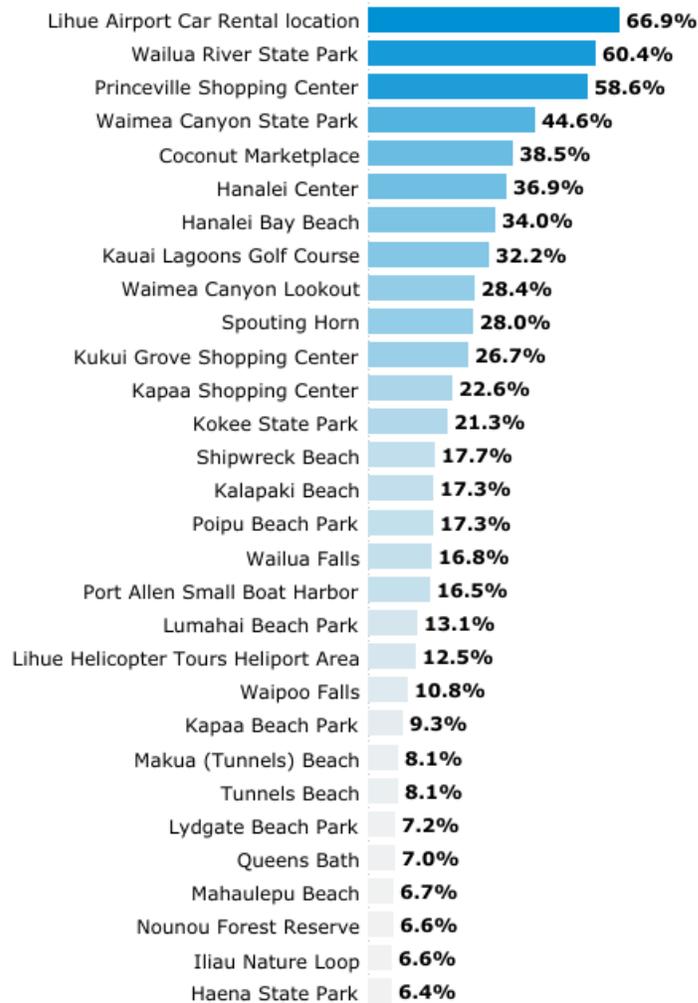
% share of visits by visitors to Kauai
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Kauai

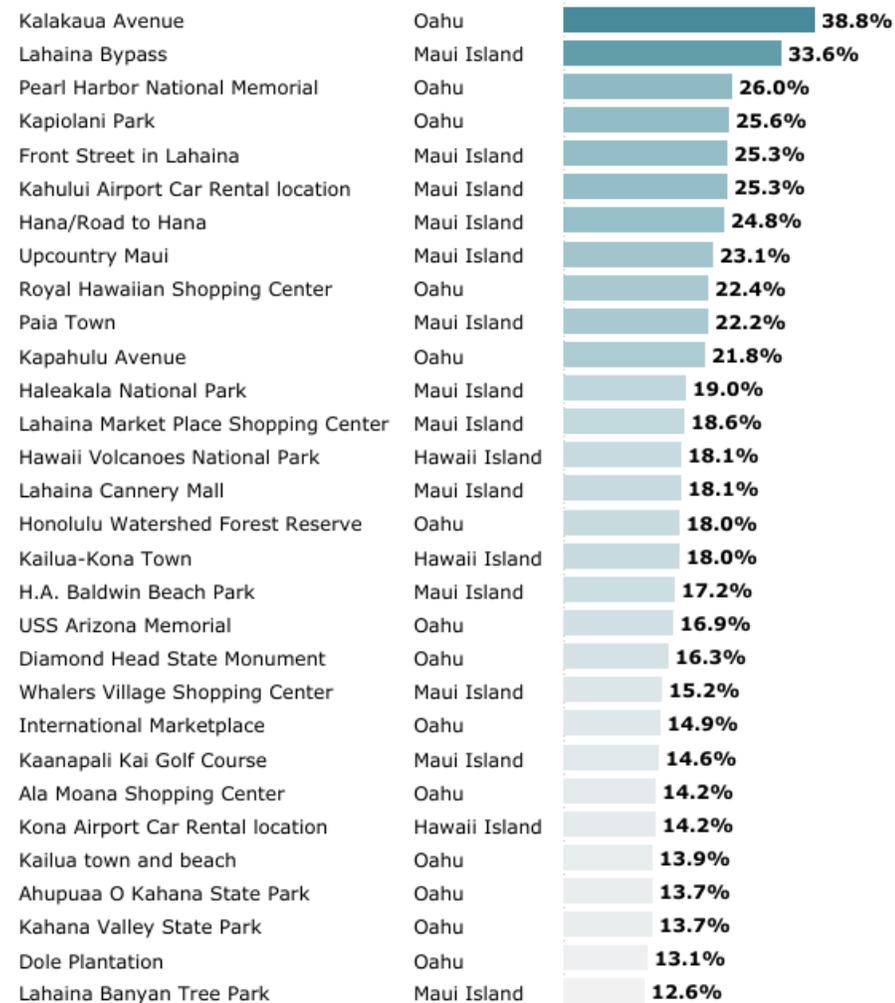
% share of visitors to Kauai going to Hanalei that also visited other POIs
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Cross Visitation on Other Islands

% share of visitors to Kauai who went to Hanalei that also visited other islands
Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

POI Visitation Summary

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

From 01-Jul-21 To 31-Jul-21 Island Kauai POI Category All POI Name Kee Beach Park

Visitors by Origin

Unique visitors



State Residents

Unique visitors, % share of total residents



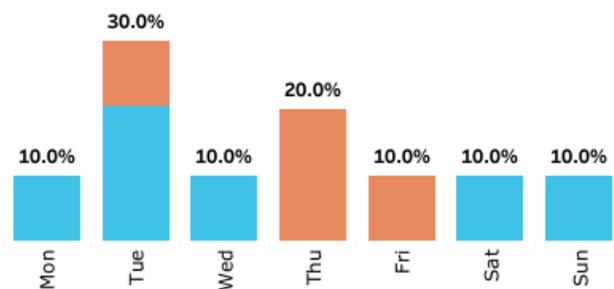
Top-10 Origin States for Domestic Visitors

Unique visitors, % share of total domestic



Visits by Day of Week

% share of visits by DOW



Top-10 Origin Countries for International Visitors

Unique visitors, % share of total international

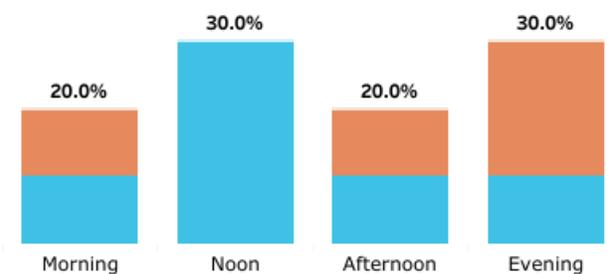
Top-10 Origin Counties for Domestic Visitors

Unique visitors, % share of total domestic



Visits by Time of Day

% share of visits by time of arrival



MAHALO!

