State of Hawaii Summary

May 2021

Visitor Arrivals
Total visitors & % change YOY (May 2021 vs. May 2019)
629.7K ▼ -24.7%

Visitor Spending
Total visitors & % change YOY (May 2021 vs. May 2019)
$1,144.7M ▼ -18.8%

Average Length of Stay (All visitors, May 2021)
9.4 Days

Market Share by Origin Markets
% share of total visitors
May 2021
- US West: 31%
- US East: 27%
- International: 42%

May 2019
- US West: 31%
- US East: 27%
- International: 42%
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 May 2021

Top-10 International Markets
Total visitors and % change YOY (May, 2021 vs. May, 2019)
- Other Asia: ▼ -95.2%
- Japan: ▼ -98.8%
- Europe: ▼ -90.9%
- China: ▼ -92.0%
- Canada: ▼ -97.9%
- United Kingdom: ▼ -85.0%
- Korea: ▼ -96.9%
- Mexico: ▼ -41.1%
- Oceania: ▼ -99.3%
- Hong Kong: ▼ -49.7%
Source: Hawaii Tourism Authority

Top-10 Domestic Markets
Total visitors and % change YOY (May, 2021 vs. May, 2019)
- California: ▲ 9.9%
- Washington: ▲ 4.4%
- Texas: ▲ 7.9%
- Arizona: ▲ 16.1%
- Utah: ▲ 32.2%
- Oregon: ▼ -6.1%
- Colorado: ▲ 6.4%
- Florida: ▲ 7.1%
- Nevada: ▲ 14.5%
- New York: ▲ 16.6%
Source: Hawaii Tourism Authority

Symphony Tourism Economics®
State of Hawaii Lodging Summary

Month Performance & YOY % Change
May 2021 vs. May 2019

<table>
<thead>
<tr>
<th>Occupancy</th>
<th>YOY</th>
<th>Supply</th>
<th>YOY</th>
<th>Demand</th>
<th>YOY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>64.3%</td>
<td>2,187.6K</td>
<td>-11.9%</td>
<td>1,407.1K</td>
<td>-29.0%</td>
</tr>
<tr>
<td>Hotel</td>
<td>61.5%</td>
<td>1,614.6K</td>
<td>-17.5%</td>
<td>993.6K</td>
<td>-25.0%</td>
</tr>
<tr>
<td>Short-term Rentals</td>
<td>72.2%</td>
<td>572.9K</td>
<td>1.1%</td>
<td>413.5K</td>
<td>-37.2%</td>
</tr>
<tr>
<td>Timeshare**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

YTD Calendar Year & YOY % Change
YTD May 2021 vs. YTD May 2019

<table>
<thead>
<tr>
<th>Occupancy</th>
<th>YOY</th>
<th>Supply</th>
<th>YOY</th>
<th>Demand</th>
<th>YOY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>47.1%</td>
<td>11,535.6K</td>
<td>-12.0%</td>
<td>5,433.6K</td>
<td>-12.7%</td>
</tr>
<tr>
<td>Hotel</td>
<td>42.2%</td>
<td>7,689.4K</td>
<td>-12.5%</td>
<td>3,248.6K</td>
<td>-10.5%</td>
</tr>
<tr>
<td>Short-term Rentals</td>
<td>57.5%</td>
<td>2,952.9K</td>
<td>-4.2%</td>
<td>1,698.8K</td>
<td>-9.7%</td>
</tr>
<tr>
<td>Timeshare**</td>
<td>54.4%</td>
<td>893.4K</td>
<td>-27.9%</td>
<td>486.2K</td>
<td>-31.7%</td>
</tr>
</tbody>
</table>

Note: OCC YOY change is percentage point change.
* 2021 are relative to 2019. All other years are YOY comparisons.
** Timeshare information is only available after the end of each quarter.
Source: STR; Transparent; and Hawaii Tourism Authority

Distribution of Room Nights Sold
Room nights sold in May 2021 and % share of total, State of Hawaii

<table>
<thead>
<tr>
<th>Year</th>
<th>Q3</th>
<th>Q4</th>
<th>Q5</th>
<th>Q6</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>63%</td>
<td>24%</td>
<td>12%</td>
<td>6,369K</td>
</tr>
<tr>
<td>2018</td>
<td>61%</td>
<td>27%</td>
<td>13%</td>
<td>6,197K</td>
</tr>
<tr>
<td>2019</td>
<td>61%</td>
<td>25%</td>
<td>13%</td>
<td>6,422K</td>
</tr>
<tr>
<td>2019</td>
<td>59%</td>
<td>29%</td>
<td>12%</td>
<td>6,709K</td>
</tr>
<tr>
<td>2019</td>
<td>60%</td>
<td>28%</td>
<td>12%</td>
<td>6,872K</td>
</tr>
<tr>
<td>2019</td>
<td>57%</td>
<td>28%</td>
<td>12%</td>
<td>6,525K</td>
</tr>
<tr>
<td>2020</td>
<td>57%</td>
<td>31%</td>
<td>12%</td>
<td>5,964K</td>
</tr>
<tr>
<td>2020</td>
<td>56%</td>
<td>55%</td>
<td>12%</td>
<td>6,55K</td>
</tr>
<tr>
<td>2020</td>
<td>77%</td>
<td>98%</td>
<td>12%</td>
<td>6,487K</td>
</tr>
<tr>
<td>2020</td>
<td>52%</td>
<td>29%</td>
<td>19%</td>
<td>1,746K</td>
</tr>
<tr>
<td>2021</td>
<td>51%</td>
<td>31%</td>
<td>17%</td>
<td>2,048K</td>
</tr>
<tr>
<td>2021</td>
<td>60%</td>
<td>25%</td>
<td>15%</td>
<td>5,025K</td>
</tr>
<tr>
<td>2021</td>
<td>73%</td>
<td>27%</td>
<td>12%</td>
<td>4,772K</td>
</tr>
</tbody>
</table>

** Timeshare information is only available after the end of each quarter.
*2021 Q2 does not include timeshare data. Timeshare information is only available after the end of each quarter.

Source: STR; Transparent; and Hawaii Tourism Authority
**Visitor Arrivals**
Total visitors & % change YOY (May. 2021 vs. May. 2019)

215.1K  ▼ -14.5%

**Visitor Spending**
Total visitors & % change YOY (May. 2021 vs. May. 2019)

$350.2M  ▼ -12.5%

**Average Length of Stay**
All visitors, May 2021

8.4 Days

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**Origin Market Share**
% share of visitors

- US West: 70%
- US East: 11%
- International: 19%

**Top-15 Points of Interest by Visitors**
% share of visits, May 2021

1. Lahaina Bypass: 10.1%
2. Front Street in Lahaina: 7.9%
3. Upcountry Maui: 5.6%
4. Kahului Airport Car Rental location: 4.7%
5. Whalers Village Shopping Center: 4.6%
6. Lahaina Cannery Mall: 4.3%
7. Hana/ Road to Hana: 4.2%
8. Kaanapali Kai Golf Course: 4.0%
9. Lahaina Market Place Shopping Center: 3.8%
10. Poa Town: 3.6%
11. Azeia Shopping Center: 3.5%
12. The Shops at Wailea: 2.5%
13. H.A. Baldwin Beach Park: 2.2%
14. The Bay Course at Kapalua Resort: 2.2%
15. Costco: 2.2%

Source: [near](formerly UberMedia)

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**Top-10 International Markets**
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- Europe: ▼ -93.0%
- Other Asia: ▼ -93.7%
- Canada: ▼ -98.4%
- China: ▼ -99.1%
- Oceania: ▼ -99.1%
- New Zealand: ▼ -95.3%
- Korea: ▼ -97.7%
- Japan: ▼ -99.0%
- Taiwan: ▼ -96.8%
- Australia: ▼ -99.8%

Source: [Hawaii Tourism Authority](formerly UberMedia)

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**Top-10 Domestic Markets**
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- California: ▲ 5.7%
- Washington: ▲ 7.2%
- Texas: ▼ -10.7%
- Arizona: ▲ 4.9%
- Oregon: ▲ 2.1%
- Colorado: ▲ 7.5%
- Utah: ▲ 54.1%
- New York: ▲ 11.5%
- Florida: ▼ -10.5%
- Illinois: ▼ -9.2%

Source: [Hawaii Tourism Authority](formerly UberMedia)

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**Top-15 Points of Interest by Residents**
% share of visits, May 2021

- Upcountry Maui: 31.6%
- Lahaina Bypass: 6.9%
- Queen Kaahumanu Center: 6.4%
- Maui Mall Shopping Center: 6.4%
- Kahului Shopping Center: 6.2%
- Costco: 4.3%
- Hana/Road to Hana: 4.2%
- Azeia Shopping Center: 3.9%
- Front Street in Lahaina: 3.5%
- Paia Town: 3.0%
- Lahaina Cannery Mall: 2.6%
- Kahului Shopping Center: 2.4%
- H.A. Baldwin Beach Park: 2.1%
- Kaanapali Kai Golf Course: 1.5%
- The Shops at Wailea: 1.3%

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

Source: [near](formerly UberMedia)
## Oahu Summary

**May 2021**

### Visitor Arrivals
Total visitors & % change YOY (May. 2021 vs. May. 2019)

- **310.7K** ▼ -38.8%

### Visitor Spending
Total visitors & % change YOY (May. 2021 vs. May. 2019)

- **$527.9M** ▼ -23.6%

### Average Length of Stay
All visitors, May 2021

- **8.1 Days**

### Top-10 International Markets
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- **Japan** ▼ -98.8%  1,261
- **Other Asia** ▼ -95.9%  546
- **China** ▼ -93.0%  494
- **Europe** ▼ -93.7%  459
- **Korea** ▼ -97.0%  278
- **Canada** ▼ -98.0%  142
- **Oceania** ▼ -99.6%  91
- **New Zealand** ▼ -98.8%  75
- **Taiwan** ▼ -98.7%  51
- **Australia** ▼ -99.8%  51

Source: Hawaii Tourism Authority

### Origin Market Share
% share of visitors

- **May 2021**
  - US West: 37%
  - US East: 62%
  - International: 1%

- **May 2019**
  - US West: 41%
  - US East: 35%
  - International: 24%

Source: Hawaii Tourism Authority

### Top-5 Points of Interest by Visitors
% share of visits, May 2021

- **Kalakaua Avenue**  10.9%
- **Kapahulu Avenue**  4.4%
- **Kailua town and beach**  3.9%
- **Ko Olina Resort**  3.9%
- **Royal Hawaiian Shopping Center**  3.6%
- **Kapiolani Park**  3.5%
- **Ala Moana Shopping Center**  3.1%
- **Honolulu Watershed Forest Reserve**  2.4%
- **Chinatown**  2.4%
- **International Marketplace**  2.4%
- **Kahana Valley State Park**  1.8%
- **Ahupua’a O Kahana State Park**  1.8%
- **Waikiki Beach**  1.5%
- **Fort DeRussy Beach Park**  1.5%
- **Kuhio Beach Park**  1.5%

Source: near (formerly UberMedia)

### Top-10 Domestic Markets
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- **California**  ▲ 16.5%  112,975
- **Texas**  ▲ 14.3%  20,632
- **Washington**  ▲ 17.7%  18,663
- **Arizona**  ▲ 15.8%  12,936
- **Utah**  ▲ 33.3%  12,166
- **Florida**  ▲ 7.3%  10,177
- **Colorado** ▼ -2.0%  7,755
- **Nevada**  ▲ 18.5%  7,731
- **New York**  ▲ 11.8%  7,714
- **Oregon** ▼ -16.9%  7,173

Source: Hawaii Tourism Authority

### Top-15 Points of Interest by Residents
% share of visits, May 2021

- **Chinatown**  ▲ 10.6%
- **Kailua town and beach**  ▲ 10.1%
- **Ala Moana Shopping Center**  ▲ 5.4%
- **Kapolei Shopping Center**  ▲ 4.4%
- **Honolulu Watershed Forest Reserve**  ▲ 4.2%
- **Waikiki Avenue**  ▲ 3.7%
- **Kapahulu Avenue**  ▲ 3.6%
- **Kalakaua Avenue**  ▲ 3.5%
- **Pearl Ridge Shopping Center**  ▲ 3.4%
- **Kahanamoku Beach Park (formerly Nanakuli) Beach**  ▲ 3.3%
- **Kapolei Park**  ▲ 3.2%
- **Kahala Mall Shopping Center**  ▲ 2.3%
- **Windward Mall Shopping Center**  ▲ 2.3%
- **Kailua Town Center Shopping Center**  ▲ 1.6%
- **Ala Moana Regional Park**  ▲ 1.4%

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

Source: near (formerly UberMedia)
Hawaii Island Summary

May 2021

Visitor Arrivals
Total visitors & % change YOY (May. 2021 vs. May. 2019)

103.6K ▼ -25.8%

Visitor Spending
Total visitors & % change YOY (May. 2021 vs. May. 2019)

$135.9M ▼ -11.9%

Average Length of Stay
All visitors, May 2021

8.9 Days

Origin Market Share
% share of visitors

May 2021

<table>
<thead>
<tr>
<th>Origin Market Share</th>
<th>% Share of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>US West</td>
<td>33%</td>
</tr>
<tr>
<td>US East</td>
<td>67%</td>
</tr>
<tr>
<td>International</td>
<td>0%</td>
</tr>
</tbody>
</table>

May 2019

<table>
<thead>
<tr>
<th>Origin Market Share</th>
<th>% Share of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>US West</td>
<td>31%</td>
</tr>
<tr>
<td>US East</td>
<td>47%</td>
</tr>
<tr>
<td>International</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors
% share of visits, May 2021

Kailua-Kona Town ▼ 17.1%
Queens MarketPlace ▼ 7.5%
Kona Airport Car Rental Location ▼ 6.7%
Hawaii Volcanoes National Park ▼ 5.6%
Kings Shops at Waikoloa ▼ 5.5%
Waikoloa Beach Resort - Beach Course ▼ 4.2%
Keauhou Shopping Center ▼ 3.8%
Puna/Pahoa/Leilani Estates/Janetia Ave ▼ 2.8%
Mauna Lani Resort - North Course ▼ 2.5%
Kilauea Overlook ▼ 2.4%
Kekaha Kai (Kona Coast) State Park ▼ 2.0%
Waikoloa Beach Resort - Kings Course ▼ 2.0%
Waikuku River State Park ▼ 1.9%
Rainbow Falls ▼ 1.9%
Mauna Kea Golf Course ▼ 1.6%

Source: near (formerly UberMedia)

Top-10 International Markets
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- Other Asia ▼ 93.3%
- China ▼ 89.6%
- Europe ▼ 93.0%
- Canada ▼ 96.4%
- Japan ▼ 96.6%
- Oceania ▼ 99.2%
- Korea ▼ 98.0%
- Taiwan ▼ 96.9%
- New Zealand ▼ 96.9%
- Australia ▼ 99.7%

Source: Hawaii Tourism Authority

Top-10 Domestic Markets
Total visitors and % change YOY (May. 2021 vs. May. 2019)

- California ▼ 4.3%
- Washington ▼ 16.5%
- Texas ▼ 8.0%
- Arizona ▼ 20.5%
- Oregon ▼ 9.6%
- Colorado ▼ 11.7%
- Florida ▼ 19.7%
- Utah ▼ 29.4%
- New York ▼ 15.7%
- Illinois ▼ 7.2%

Source: Hawaii Tourism Authority

Source: near (formerly UberMedia)
Kauai Summary

May 2021

Visitor Arrivals
Total visitors & % change YOY (May 2021 vs. May 2019)
73.0K  ▼ -34.9%

Visitor Spending
Total visitors & % change YOY (May 2021 vs. May 2019)
$118.9M  ▼ -20.6%

Average Length of Stay
All visitors, May 2021
8.6 Days

Origin Market Share
% share of visitors

May 2021

May 2019

Top-10 International Markets
Total visitors and % change YOY (May 2021 vs. May 2019)

Source: Hawaii Tourism Authority

Top-10 Domestic Markets
Total visitors and % change YOY (May 2021 vs. May 2019)

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors
% share of visits, May 2021

Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents
% share of visits, May 2021

Source: near (formerly UberMedia)