

HTA REGULAR BOARD MEETING

Thursday, October 28, 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

September 2021 Highlights

EXPENDITURES (\$mil.)	2021P	2020	2019
TOTAL (AIR)	1,054.8	N/A	1,235.4
U.S. West	656.3	N/A	466.0
U.S. East	341.0	N/A	288.9
Japan	6.2	N/A	196.5
Canada	12.7	N/A	40.5
All Others	38.7	N/A	243.4

PPPD SPENDING (\$)	2021P	2020	2019
TOTAL (AIR)	227.8	N/A	202.9
U.S. West	225.6	N/A	179.1
U.S. East	237.4	N/A	228.5
Japan	235.4	N/A	231.1
Canada	188.3	N/A	158.9
All Others	202.2	N/A	217.7

VISITOR ARRIVALS	2021P	2020	2019
TOTAL (AIR)	505,861	18,409	718,042
U.S. West	338,680	16,311	305,808
U.S. East	145,626	10,170	133,185
Japan	1,769	6,141	143,928
Canada	4,326	86	21,928
All Others	15,460	173	113,192

AVERAGE DAILY CENSUS	2021P	2020	2019
TOTAL (AIR)	154,355	20,472	202,987
U.S. West	96,989	18,363	86,739
U.S. East	47,865	10,999	42,141
Japan	875	7,364	28,343
Canada	2,241	59	8,498
All Others	6,386	378	37,266

Note: 2021 figures are preliminary.

September 2021 Highlights

EXPENDITURES (\$mil.)	2021P	2020	2019
O'ahu	623.1	N/A	732.0
Maui	389.1	N/A	404.7
Moloka'i	1.6	N/A	1.7
Lāna'i	13.0	N/A	12.4
Kaua'i	154.4	N/A	159.0
Hawai'i Island	187.2	N/A	193.1

PPPD SPENDING (\$)	2021P	2020	2019
O'ahu	218.4	N/A	187.1
Maui	208.5	N/A	202.2
Moloka'i	114.1	N/A	105.3
Lāna'i	490.5	N/A	512.8
Kaua'i	195.1	N/A	190.9
Hawai'i Island	187.5	N/A	183.2

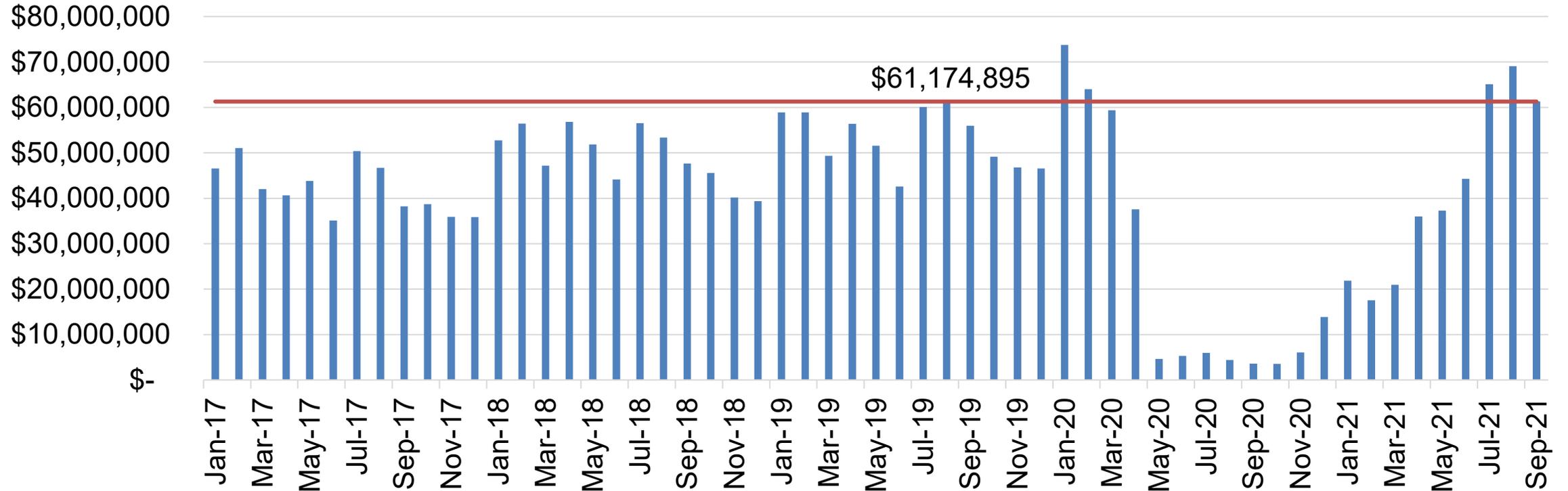
VISITOR ARRIVALS	2021P	2020	2019
O'ahu	369,870	16,917	575,070
Maui	232,208	2,453	273,638
Moloka'i	2,596	109	4,860
Lāna'i	5,616	81	7,739
Kaua'i	98,663	1,342	120,030
Hawai'i Island	119,932	3,683	157,544

AVERAGE DAILY CENSUS	2021P	2020	2019
O'ahu	92,051	14,703	126,206
Maui	60,187	2,141	64,553
Moloka'i	441	46	523
Lāna'i	858	33	779
Kaua'i	25,537	1,489	26,865
Hawai'i Island	32,195	4,212	33,989

Note: 2021 figures are preliminary.

September 2021 Highlights

- Preliminary September TAT Collections: \$61.3 million
- Preliminary Fiscal 22 TAT Collections: \$195.5 million (+1,300%)
- Fiscal 21 TAT Collections: \$14.0 million (+\$181.5 million)



Source: Department of Taxation

September 2021 Highlights

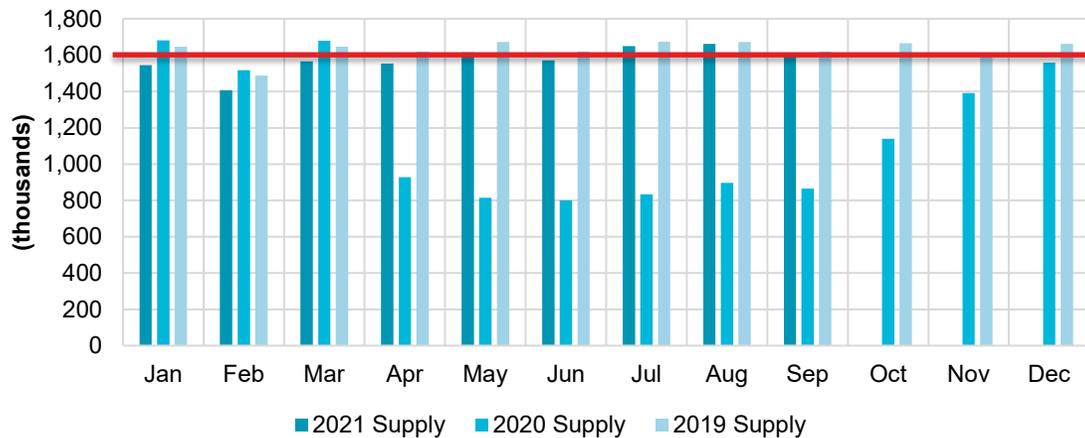
State of Hawai'i Hotel Performance

	2021	2020	2019
Occupancy	55.2%	20.6%	78.9%
ADR	\$304	\$150	\$246
RevPAR	\$168	\$31	\$194

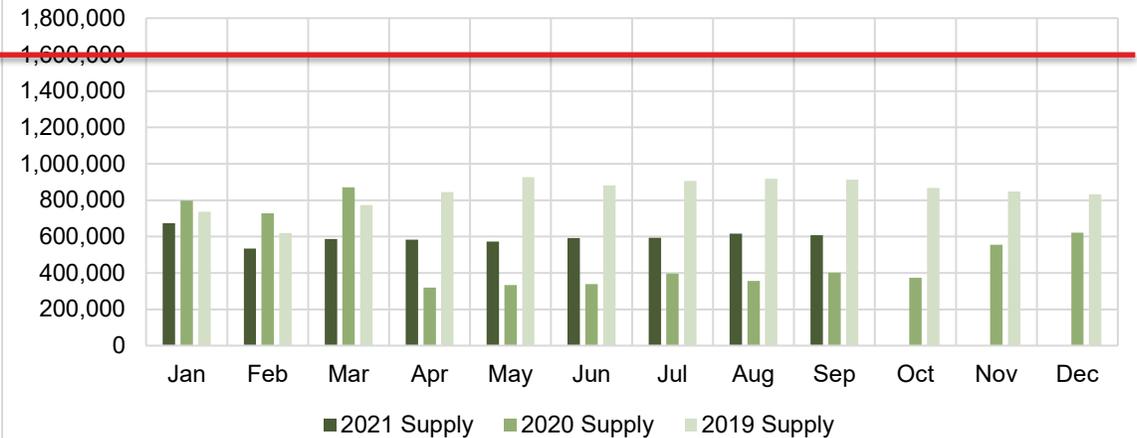
State of Hawai'i Vacation Rental Performance

	2021	2020	2019
Occupancy	59.5%	8.8%	68.1%
ADR	\$245	\$191	\$194

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

September 2021 Highlights

Accommodation Choice	US West		US East		Japan		Canada	
	2021P	2019	2021P	2019	2021P	2019	2021P	2019
Hotel	52.0%	62.3%	49.5%	50.9%	58.2%	60.3%	18.5%	80.5%
Condo	19.7%	15.9%	20.7%	18.7%	16.8%	13.7%	70.7%	14.5%
Timeshare	10.6%	9.0%	11.3%	12.3%	9.2%	9.4%	4.6%	6.9%
Cruise Ship	0.0%	1.5%	0.0%	0.7%	0.0%	3.7%	0.1%	0.2%
Friends & Relatives	9.9%	7.7%	9.4%	10.1%	10.5%	10.8%	7.0%	1.3%
Bed & Breakfast	1.1%	1.4%	1.0%	1.1%	1.5%	1.5%	0.1%	0.1%
Rental House	12.3%	8.2%	12.6%	11.1%	12.2%	9.8%	1.1%	0.3%
Hostel	0.5%	0.9%	0.4%	0.6%	0.6%	0.8%	0.2%	0.2%
Camp Site, Beach	0.5%	0.6%	0.4%	0.6%	0.6%	0.7%	0.1%	0.0%
Private Room in Private Home	0.9%	1.4%	0.9%	1.2%	0.9%	1.2%	0.5%	0.3%
Shared Room in Private Home	0.3%	0.5%	0.3%	0.5%	0.3%	0.6%	0.4%	0.2%
Other	1.7%	1.5%	1.6%	2.1%	1.8%	2.2%	1.6%	0.0%

Note: 2021 figures are preliminary.

September 2021 Highlights

Purpose of Trip	US West		US East		Japan		Canada	
	2021P	2019	2021P	2019	2021P	2019	2021P	2019
Pleasure (Net)	84.6%	84.7%	85.7%	83.8%	83.2%	79.0%	72.2%	89.7%
Honeymoon/Get Married	6.8%	7.6%	5.0%	5.2%	11.0%	8.7%	3.0%	11.9%
Honeymoon	6.1%	6.9%	4.3%	4.3%	10.3%	8.0%	2.1%	11.5%
Get Married	1.0%	1.2%	0.9%	1.1%	1.1%	1.1%	0.8%	2.1%
Pleasure/Vacation	78.8%	77.8%	81.6%	79.4%	73.6%	71.2%	69.2%	78.6%
Mtgs/Conventions/Incentive	1.9%	3.7%	1.5%	3.0%	2.8%	5.7%	1.9%	2.8%
Conventions	0.7%	1.9%	0.6%	1.7%	0.9%	2.8%	0.3%	0.6%
Corporate Meetings	0.5%	0.8%	0.5%	0.8%	0.7%	1.4%	1.6%	0.2%
Incentive	0.7%	1.1%	0.5%	0.5%	1.4%	1.7%	0.0%	2.1%
Other Business	2.7%	3.0%	2.6%	4.2%	2.8%	4.8%	4.5%	0.5%
Visit Friends/Rel.	11.8%	7.2%	11.7%	9.5%	11.8%	10.3%	15.8%	1.3%
Gov't/Military	1.1%	1.2%	0.6%	1.0%	1.7%	2.9%	1.1%	0.1%
Attend School	0.3%	0.3%	0.1%	0.1%	0.3%	0.3%	2.0%	0.6%
Sport Events	0.2%	0.7%	0.2%	0.9%	0.1%	0.7%	0.0%	0.3%
Other	2.7%	5.1%	2.5%	4.3%	2.8%	4.3%	5.6%	8.9%

Note: 2021 figures are preliminary.

Month
September 2021

State of Hawaii | Island Summary | Lodging Summary

Visitor Arrivals

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

505.9K ▼ -29.5%

Visitor Spending

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

\$1,054.8M ▼ -14.6%

Average Length of Stay

All visitors, September 2021

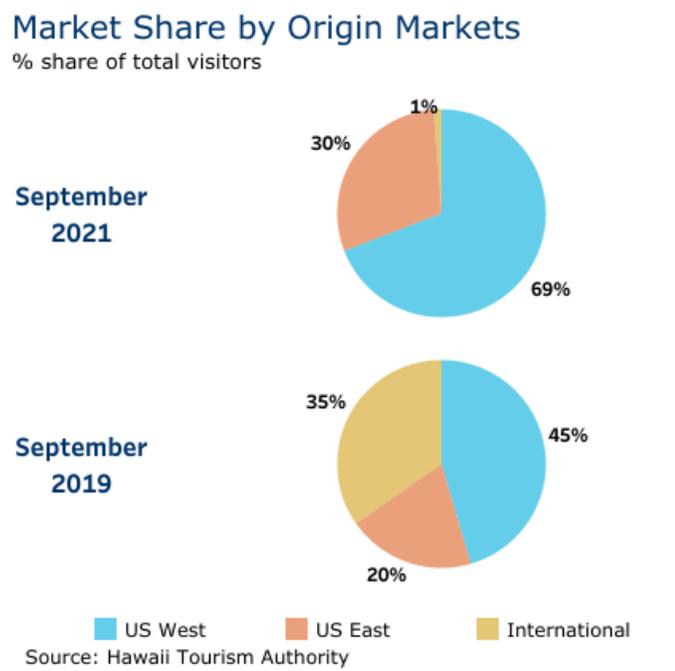
9.2 Days

Top-10 International Markets

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

Canada	▼ -80.3%	4,326
Other Asia	▼ -92.8%	1,878
Japan	▼ -98.8%	1,769
Europe	▼ -92.5%	1,052
Korea	▼ -94.3%	1,000
Mexico	▼ -10.0%	767
United Kingdom	▼ -91.8%	371
China	▼ -94.7%	327
Taiwan	▼ -82.0%	315
Germany	▼ -94.3%	298

Source: Hawaii Tourism Authority



Top-10 Domestic Markets

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

California	▼ -97.1%	5,371
Washington	▼ -96.4%	1,389
Texas	▼ -95.3%	1,033
Oregon	▼ -96.2%	651
Florida	▼ -93.5%	646
Arizona	▼ -97.0%	528
Colorado	▼ -95.8%	518
Nevada	▼ -94.7%	512
Utah	▼ -95.9%	440
New York	▼ -95.7%	387

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 September 2021

POI	Island	Residents	Visitors
Kalakaua Avenue	Oahu	59%	41%
Kailua town and beach	Oahu	89%	11%
Kapahulu Avenue	Oahu	77%	23%
Lahaina Bypass	Maui Island	70%	30%
Kapiolani Park	Oahu	71%	29%
Honolulu Watershed Forest Reserve	Oahu	88%	12%
Upcountry Maui	Maui Island	93%	7%
Ala Moana Shopping Center	Oahu	86%	14%
Ko Olina Resort	Oahu	57%	43%
Royal Hawaiian Shopping Center	Oahu	53%	47%
Chinatown	Oahu	94%	6%
Front Street in Lahaina	Maui Island	60%	40%
Kailua-Kona Town	Hawaii Island	65%	35%
International Marketplace	Oahu	53%	47%
Kahului Airport Car Rental location	Maui Island	48%	52%
Hana/Road to Hana	Maui Island	72%	28%
Kahana Valley State Park	Oahu	71%	29%
Whalers Village Shopping Center	Maui Island	47%	53%
Ahupuaa O Kahana State Park	Oahu	71%	29%
Lahaina Cannery Mall	Maui Island	66%	34%
Kuhio Beach Park	Oahu	42%	58%
Lahaina Market Place Shopping Center	Maui Island	50%	50%
Paia Town	Maui Island	70%	30%
Kaanapali Kai Golf Course	Maui Island	61%	39%
Fort DeRussy Beach Park	Oahu	39%	61%
Azeka Shopping Center	Maui Island	76%	24%
Ala Moana Regional Park	Oahu	81%	19%
Waikiki Beach	Oahu	39%	61%
Pearl Harbor National Memorial	Oahu	33%	67%
Honolulu Zoo	Oahu	65%	35%

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

Source: near (formerly UberMedia)

Month
September 2021

Island
Oahu

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

Visitor Arrivals

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

246.2K ▼ -46.3%

Visitor Spending

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

\$465.9M ▼ -23.3%

Average Length of Stay

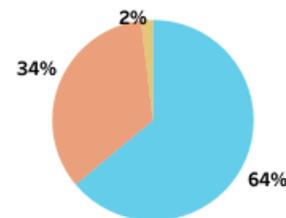
All visitors, September 2021

7.5 Days

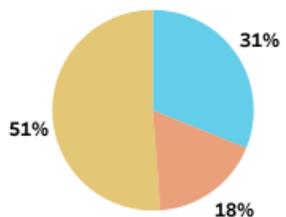
Origin Market Share

% share of visitors

September 2021



September 2019

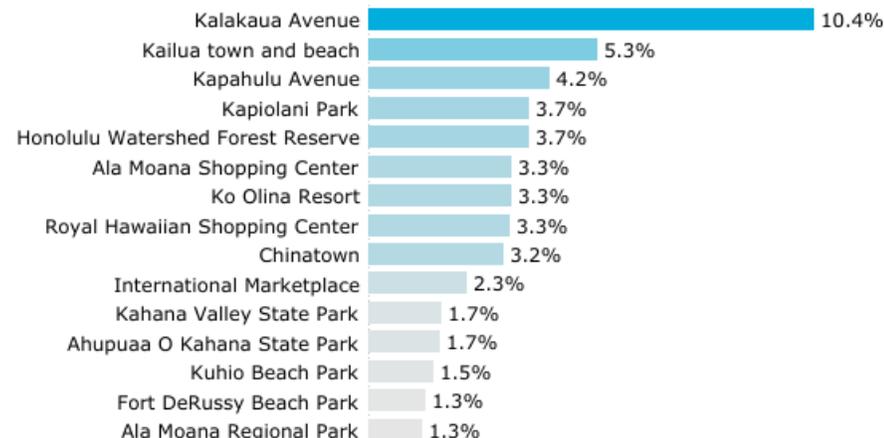


US West | US East | International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

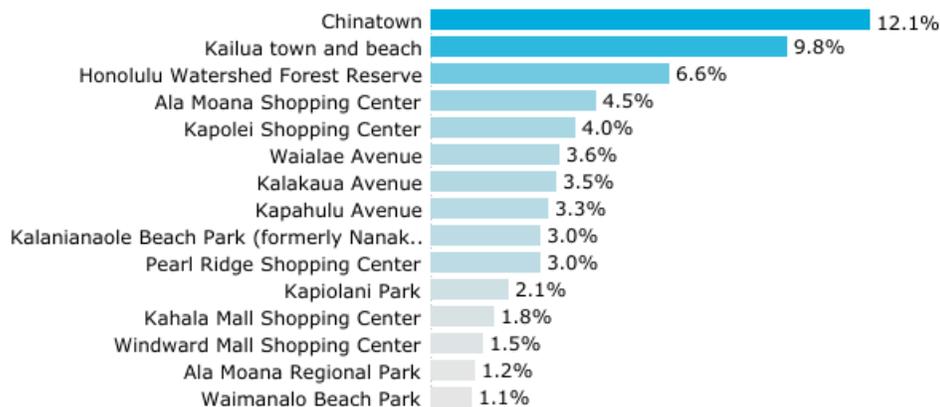
% share of visits, September 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, September 2021

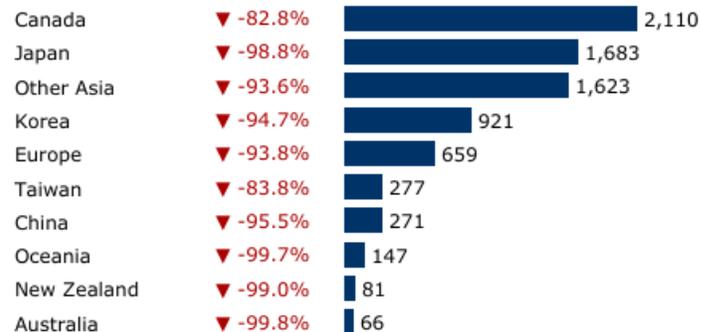


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

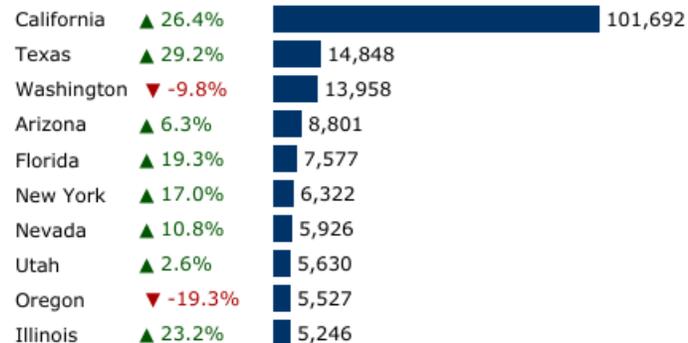
Total visitors and % change YOY (Sep. 2021 vs. Sep. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

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



Source: Hawaii Tourism Authority

Month
September 2021

Island
Maui Island

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

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

172.8K ▼ -17.8%

Visitor Spending

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

\$315.8M ▼ -7.0%

Average Length of Stay

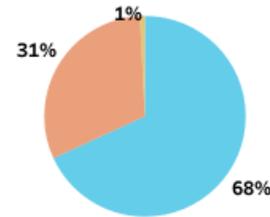
All visitors, September 2021

8.1 Days

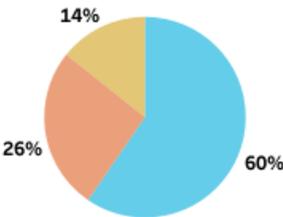
Origin Market Share

% share of visitors

September 2021



September 2019

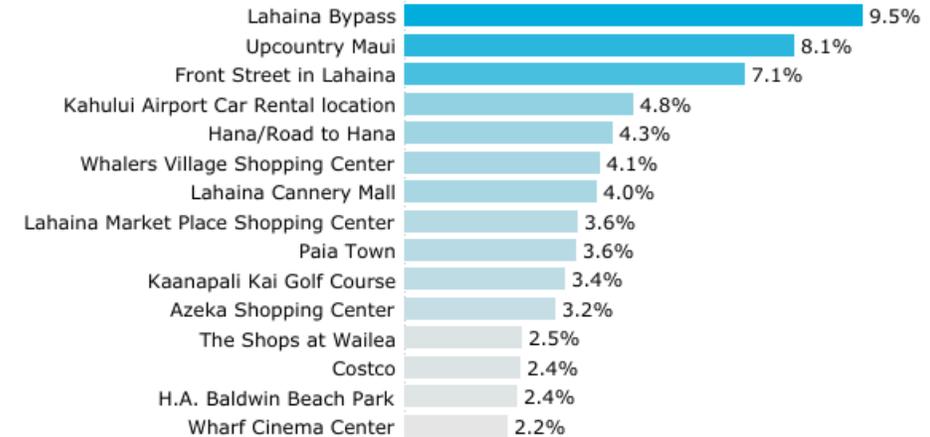


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

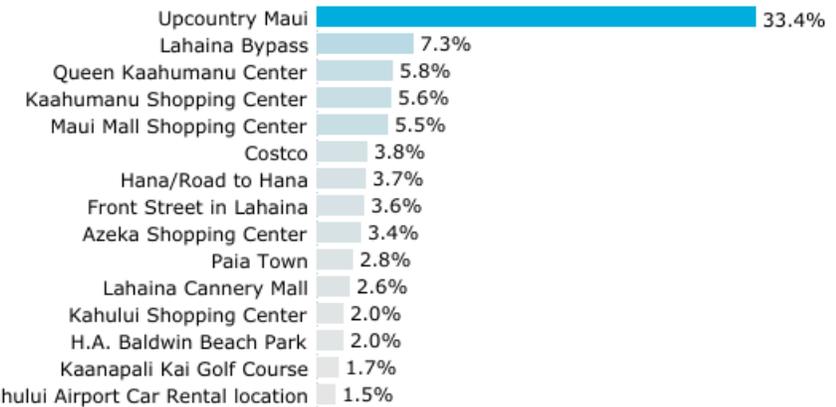
% share of visits, September 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, September 2021

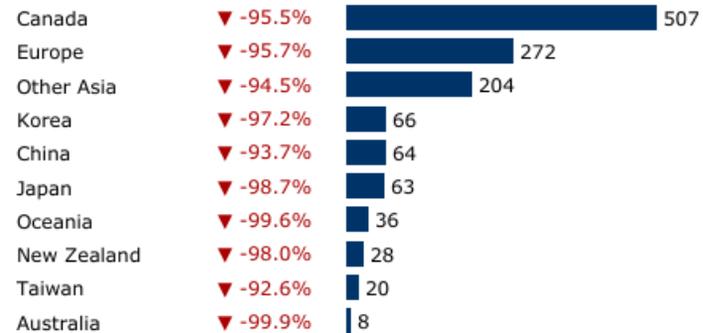


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

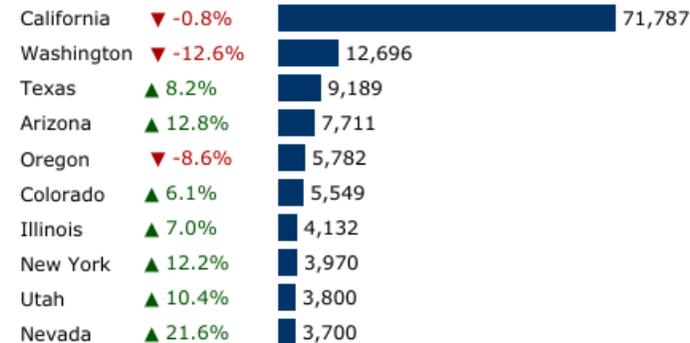
Total visitors and % change YOY (Sep. 2021 vs. Sep. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

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



Source: Hawaii Tourism Authority

Month
September 2021

Island
Hawaii Island

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

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

80.4K ▼ -28.3%

Visitor Spending

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

\$137.0M ▼ -6.1%

Average Length of Stay

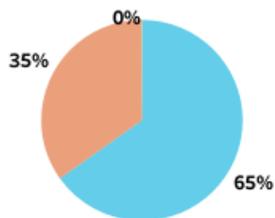
All visitors, September 2021

9.1 Days

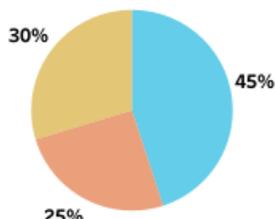
Origin Market Share

% share of visitors

September 2021



September 2019

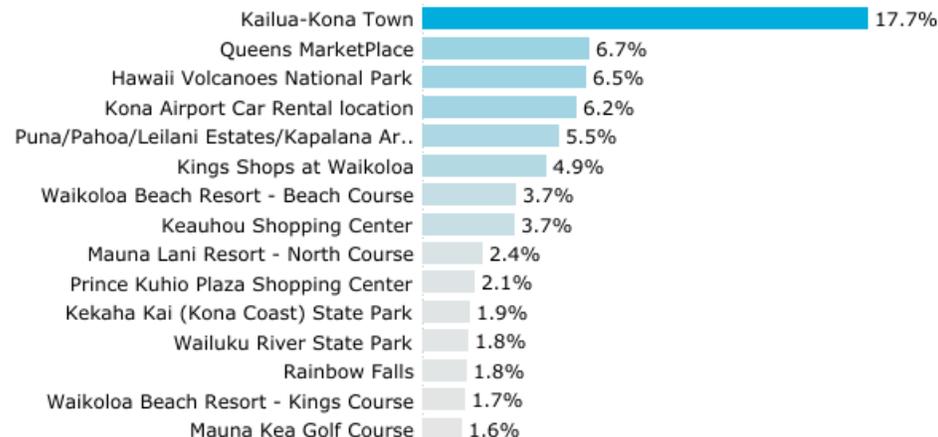


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

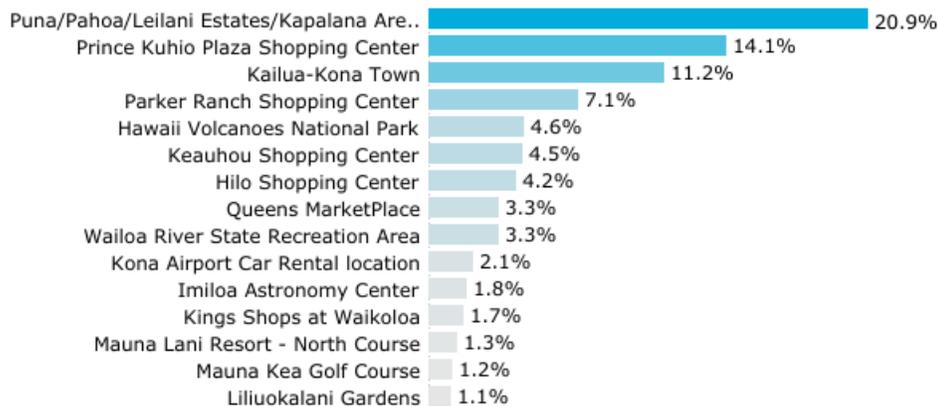
% share of visits, September 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, September 2021



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

Source: near (formerly UberMedia)

Top-10 International Markets

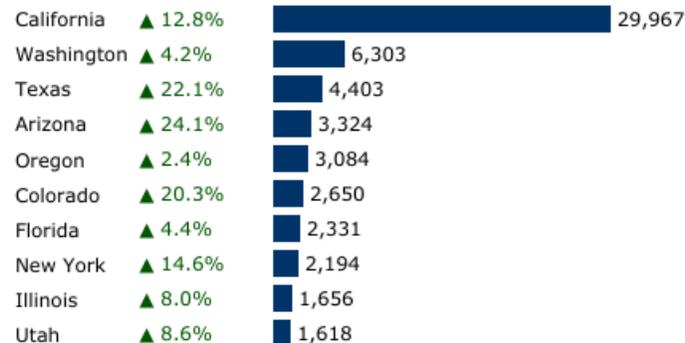
Total visitors and % change YOY (Sep. 2021 vs. Sep. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

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



Source: Hawaii Tourism Authority

Month
September 2021

Island
Kauai

State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

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

77.3K ▼ -17.3%

Visitor Spending

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

\$126.5M ▼ -4.2%

Average Length of Stay

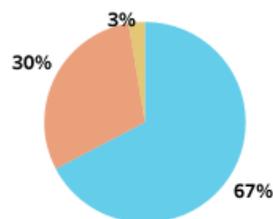
All visitors, September 2021

8.1 Days

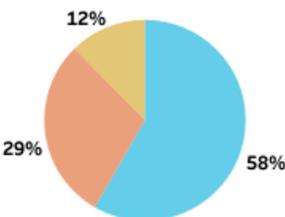
Origin Market Share

% share of visitors

September 2021



September 2019

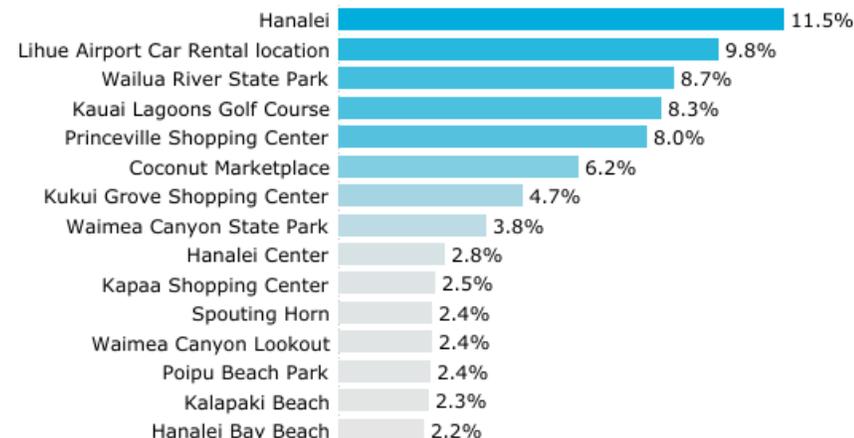


US West US East International

Source: Hawaii Tourism Authority

Top-15 Points of Interest by Visitors

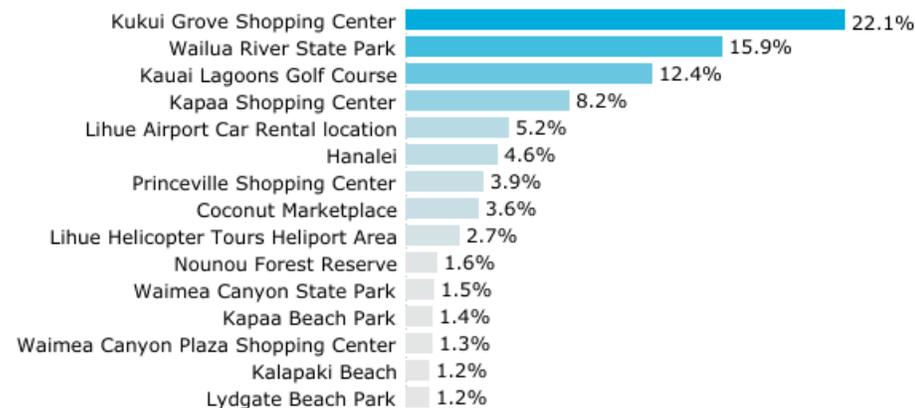
% share of visits, September 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, September 2021

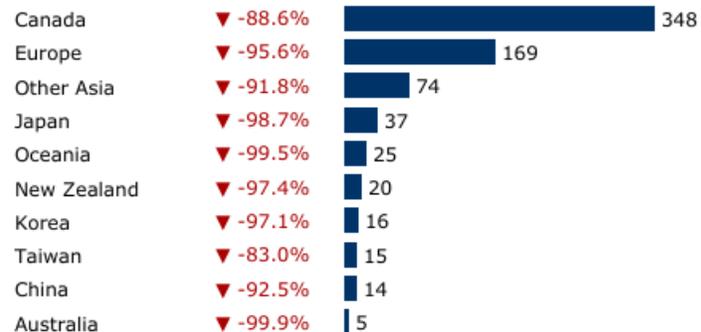


* Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Top-10 International Markets

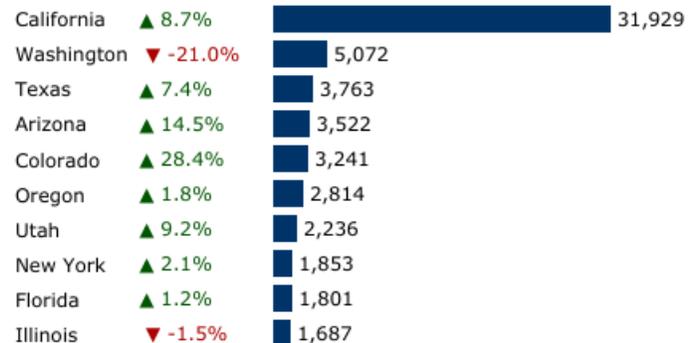
Total visitors and % change YOY (Sep. 2021 vs. Sep. 2019)



Source: Hawaii Tourism Authority

Top-10 Domestic Markets

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



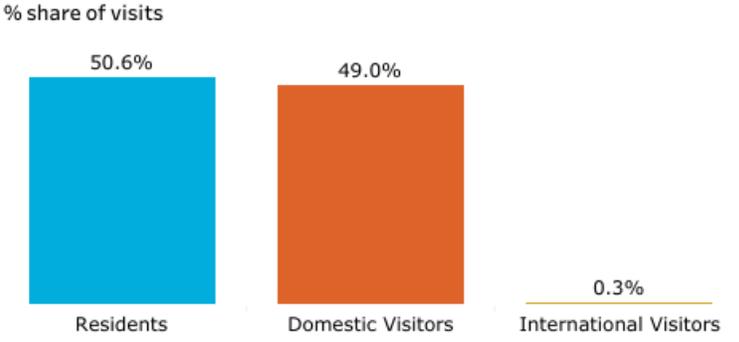
Source: Hawaii Tourism Authority

Visits to POI

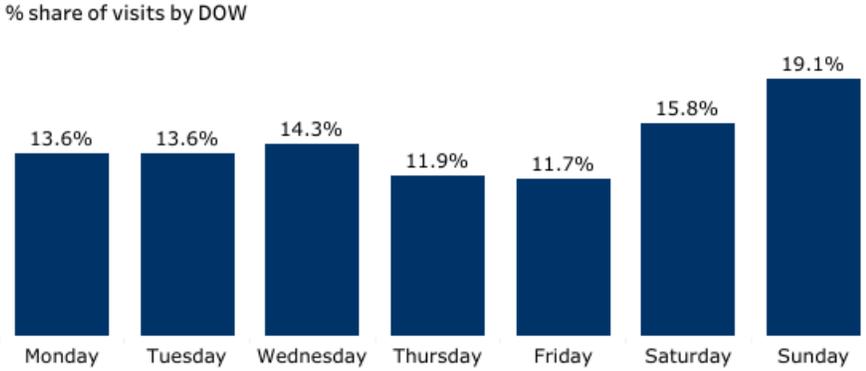
Island: Kauai
 POI Name: Hanalei
 Start Date: 01-Sep-21
 End Date: 30-Sep-21

Sample size: 1,528

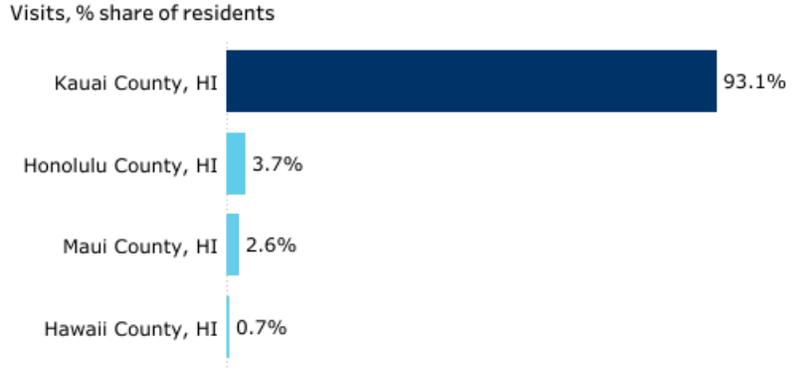
Visits by Origin



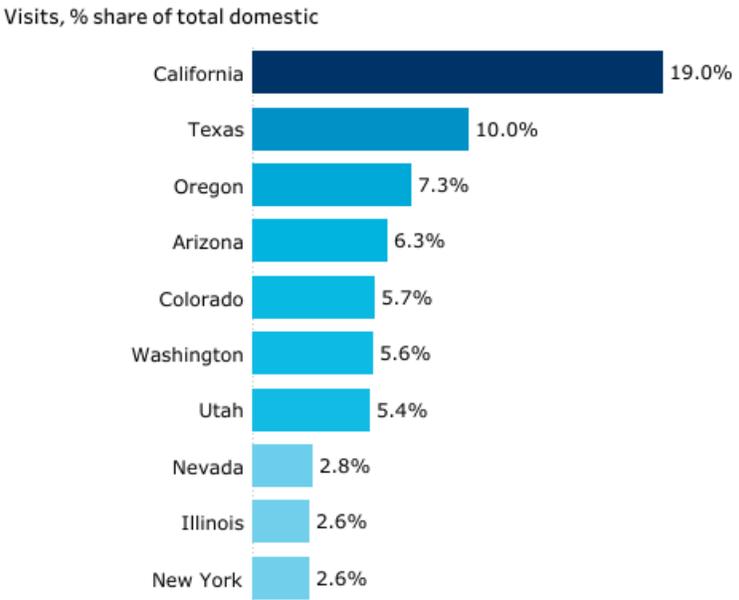
Visits by Day of Week



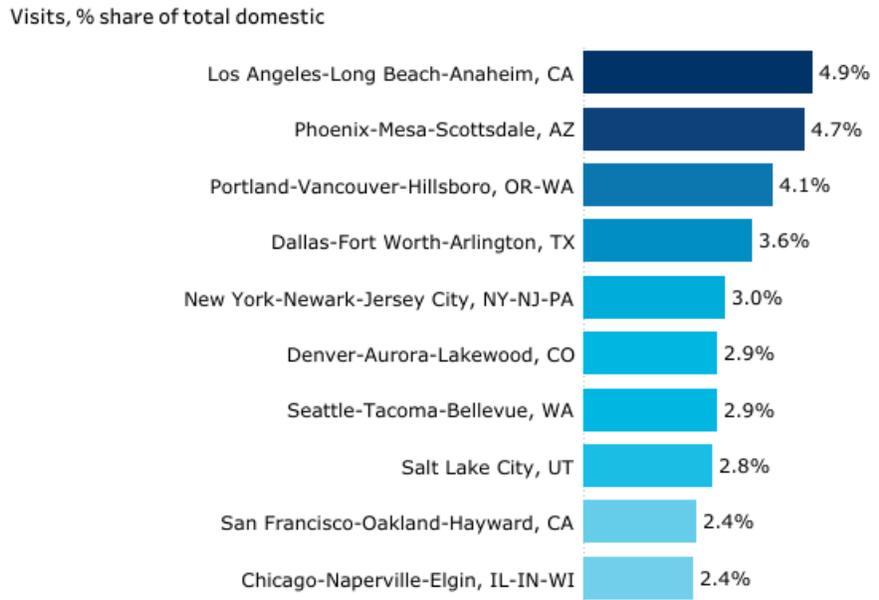
State Residents



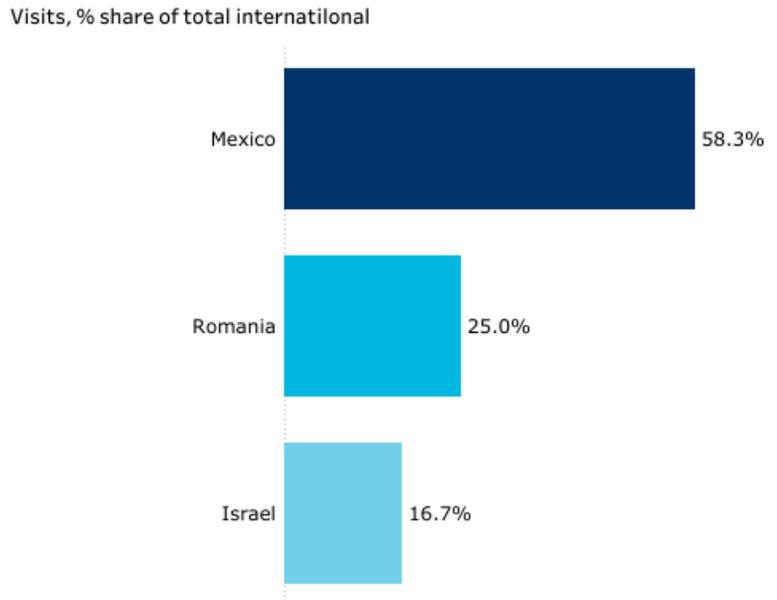
Top-10 Origin States for Domestic Visits



Top-10 Origin Counties for Domestic Visits



Top-10 Origin Countries for International Visits

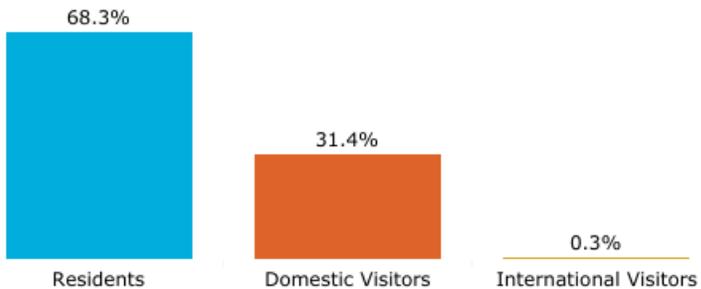


Island: Hawaii Island
 POI Name: Hawaii Volcanoes National Park
 Start Date: 01-Sep-21
 End Date: 30-Sep-21

Sample size: 2,076

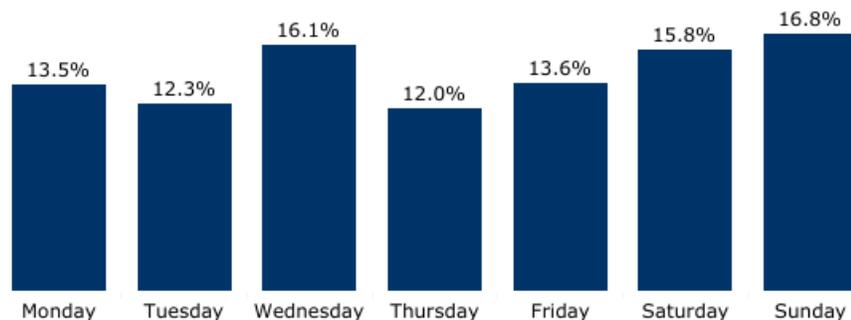
Visits by Origin

% share of visits



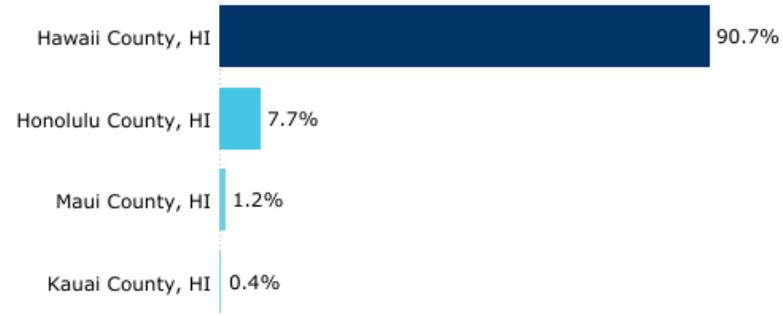
Visits by Day of Week

% share of visits by DOW



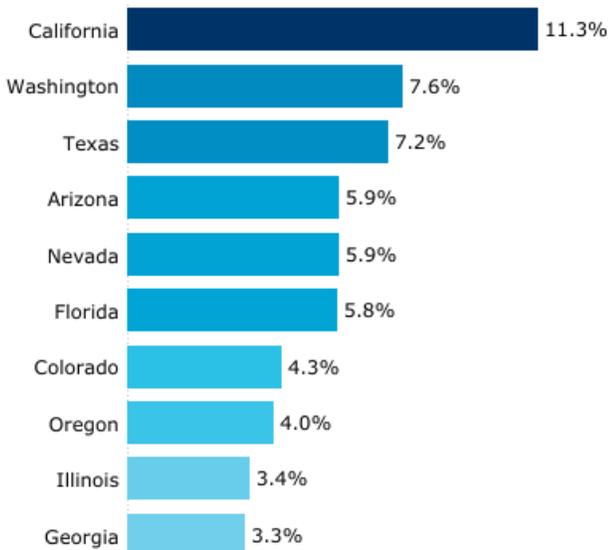
State Residents

Visits, % share of residents



Top-10 Origin States for Domestic Visits

Visits, % share of total domestic



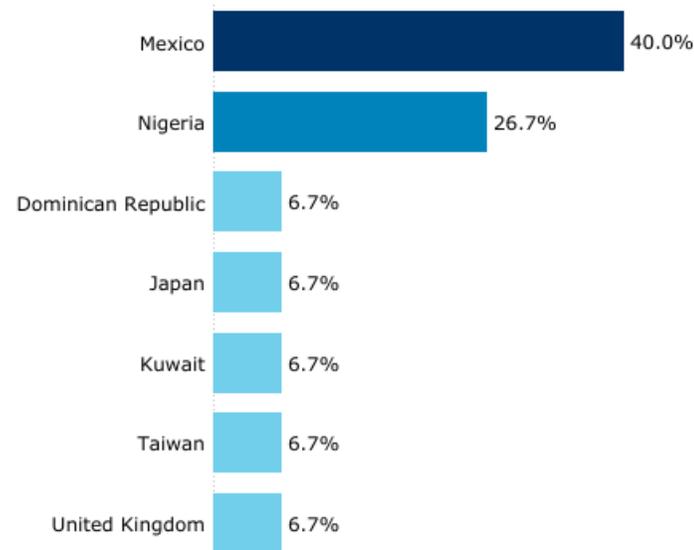
Top-10 Origin Counties for Domestic Visits

Visits, % share of total domestic



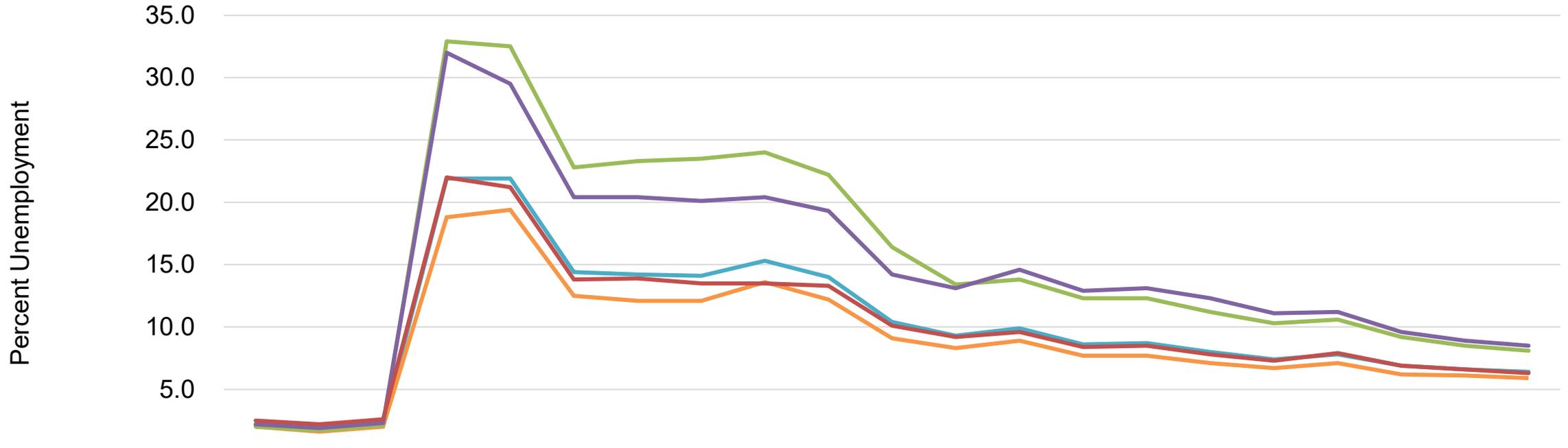
Top-10 Origin Countries for International Visits

Visits, % share of total international



September 2021 Highlights

Unemployment Rate, Civilian



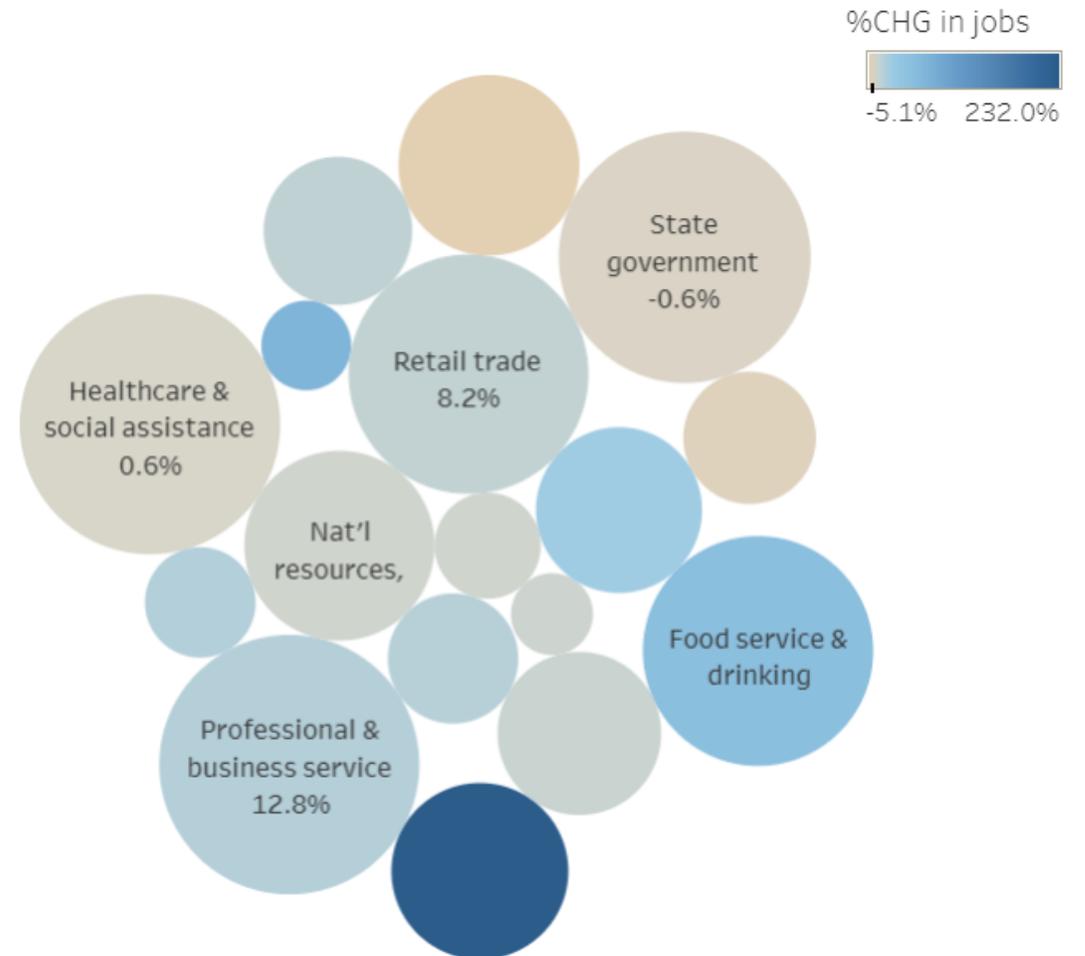
	2020-01	2020-02	2020-03	2020-04	2020-05	2020-06	2020-07	2020-08	2020-09	2020-10	2020-11	2020-12	2021-01	2021-02	2021-03	2021-04	2021-05	2021-06	2021-07	2021-08	2021-09
State of Hawai'i	2.1	1.7	2.1	21.9	21.9	14.4	14.2	14.1	15.3	14.0	10.4	9.3	9.9	8.6	8.7	8.0	7.4	7.8	6.9	6.6	6.4
Honolulu County	2.0	1.6	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	6.1	5.9
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	8.5	8.1
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	8.9	8.5
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	6.6	6.3

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

September 2021 Highlights

	Jobs	CHG*	%CHG*
Total non-agriculture W&S jobs	575,200	67,100	13.2%
Nat'l resources, mining & construction	37,200	1,300	3.6%
Manufacturing	11,600	400	3.6%
Wholesale trade	17,500	1,900	12.2%
Retail trade	59,200	4,500	8.2%
Transportation, warehousing & utilities	28,400	4,800	20.3%
Information	6,900	300	4.5%
Financial activities	27,500	1,500	5.8%
Professional & business service	69,600	7,900	12.8%
Educational service	12,600	1,500	13.5%
Healthcare & social assistance	69,800	400	0.6%
Arts, entertainment & recreation	8,300	3,300	66.0%
Accommodation	32,200	22,500	232.0%
Food service & drinking places	54,600	17,600	47.6%
Other service	22,700	1,900	9.1%
Federal government	33,700	-1,800	-5.1%
State government	65,300	-400	-0.6%
Local government	18,100	-500	-2.7%

*Change from the same period of previous year



Compiled by Research & Economic Analysis Division, State of Hawaii Department of Business, Economic Development and Tourism. Source: State of Hawai'i Dep. of Labor & Industrial Relations

Scheduled Nonstop Seats to Hawai'i by Port Entry

September	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	962,659	156,220	1,012,883	933,327	144,068	717,182	29,332	12,152	295,701
HONOLULU	488,158	129,848	666,292	459,333	117,696	387,255	28,825	12,152	279,037
KAHULUI	253,328	13,361	204,957	252,821	13,361	197,877	507	0	7,080
KONA	118,504	9,453	74,540	118,504	9,453	64,956	0	0	9,584
HILO	3,759	0	3,486	3,759	0	3,486	0	0	0
LIHU'E	98,910	3,558	63,608	98,910	3,558	63,608	0	0	0

October	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,019,719	221,716	1,057,045	974,971	207,560	760,985	44,748	14,156	296,060
HONOLULU	502,441	154,259	673,909	464,898	140,103	399,574	37,543	14,156	274,335
KAHULUI	284,254	31,068	222,366	277,397	31,068	211,816	6,857	0	10,550
KONA	125,925	23,045	83,243	125,751	23,045	72,590	174	0	10,653
HILO	3,759	0	4,648	3,759	0	4,648	0	0	0
LIHU'E	103,340	13,344	72,879	103,166	13,344	72,357	174	0	522

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of October 25, 2021, subject to change

Scheduled Nonstop Seats to Hawai'i by Port Entry

November	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,038,035	437,024	1,066,503	962,182	421,726	764,288	75,853	15,298	302,215
HONOLULU	509,334	234,788	656,979	462,265	219,490	395,176	47,069	15,298	261,803
KAHULUI	294,329	107,560	231,519	273,375	107,560	209,739	20,954	0	21,780
KONA	126,333	45,458	93,017	121,983	45,458	78,213	4,350	0	14,804
HILO	4,296	0	3,818	4,296	0	3,818	0	0	0
LIHU'E	103,743	49,218	81,170	100,263	49,218	77,342	3,480	0	3,828

December	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,238,328	595,932	1,240,436	1,079,082	557,760	898,261	159,246	38,172	342,175
HONOLULU	634,227	328,050	750,881	518,235	297,754	456,929	115,992	30,296	293,952
KAHULUI	337,143	175,410	277,908	306,419	167,534	250,970	30,724	7,876	26,938
KONA	148,724	77,725	115,152	140,196	77,725	98,565	8,528	0	16,587
HILO	4,654	0	4,316	4,654	0	4,316	0	0	0
LIHU'E	113,580	14,747	92,179	109,578	14,747	87,481	4,002	0	4,698

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of October 25, 2021, subject to change

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

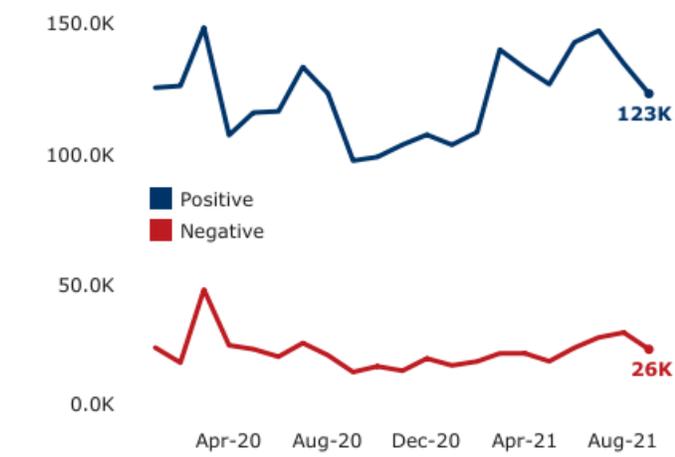
Companies that plan to resume domestic travel in the next 1-3 m..



Source: GBTA Business Travel Survey

Social Travel Sentiment by Month

Positive vs. Negative mentions of travel Jan-20 to Sep-21



Source: MMGY Global

Consumer Travel Sentiment

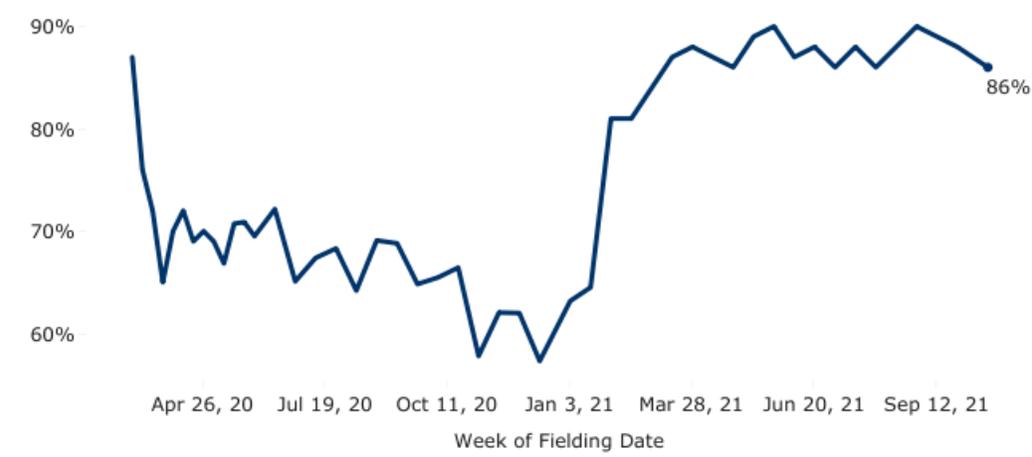
% of travelers that are ready to travel



Source: Destination Analysts

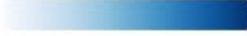
Consumer Travel Sentiment

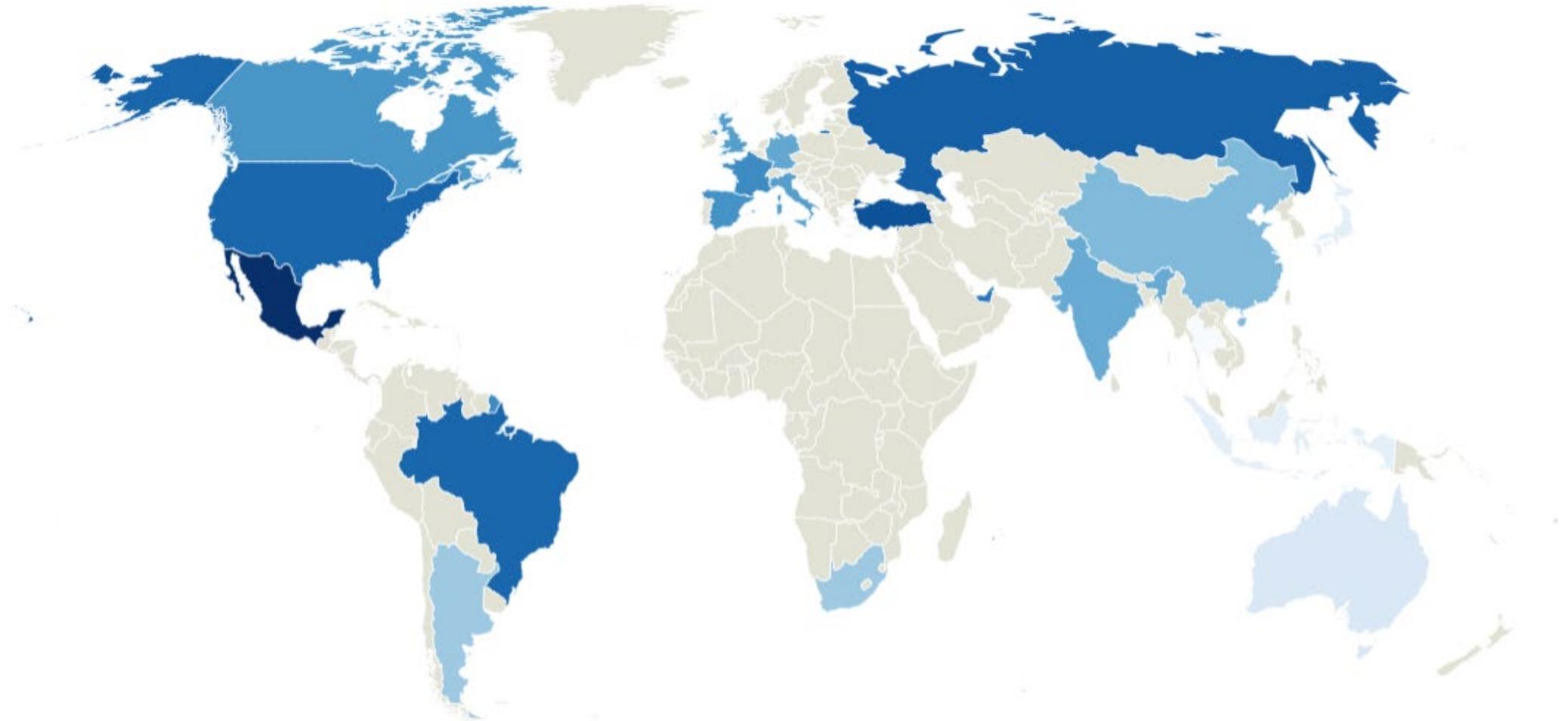
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

Skift Recovery Index – September 2021

Country Score 22  98



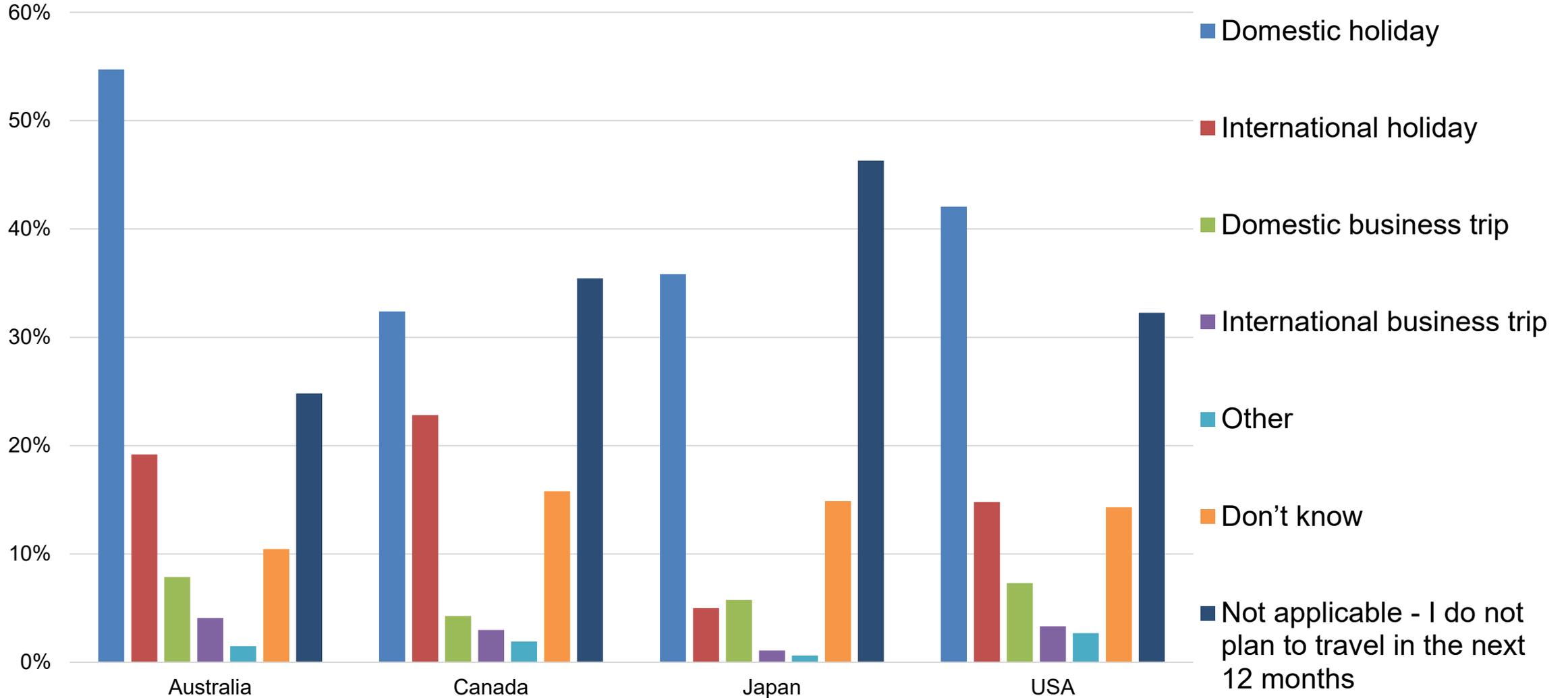
Source: Skift Research

Skift Recovery Index Origin Scores – September 2021

Country/Month	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sept-21
Argentina	47%	46%	40%	52%	59%	51%	70%	71%
Australia	38%	46%	57%	53%	44%	35%	30%	32%
Brazil	48%	34%	42%	52%	64%	71%	88%	77%
Canada	25%	31%	28%	33%	52%	62%	60%	54%
China	26%	34%	39%	45%	45%	45%	37%	39%
France	37%	37%	38%	57%	76%	65%	68%	64%
Germany	30%	34%	34%	55%	74%	63%	65%	67%
Hong Kong, China	19%	21%	22%	20%	22%	24%	27%	23%
India	45%	44%	42%	28%	41%	44%	69%	62%
Indonesia	31%	33%	36%	34%	35%	26%	28%	33%
Italy	30%	28%	34%	53%	66%	61%	66%	58%
Japan	28%	32%	30%	27%	32%	33%	31%	31%
Mexico	61%	82%	83%	85%	88%	86%	80%	80%
Russia	73%	96%	85%	86%	91%	91%	104%	95%
Singapore	21%	27%	35%	35%	27%	25%	23%	22%
South Africa	39%	46%	51%	41%	41%	35%	43%	48%
Spain	32%	38%	40%	54%	65%	62%	75%	68%
Thailand	34%	39%	29%	23%	26%	24%	22%	26%
Turkey	46%	53%	57%	58%	89%	87%	113%	118%
U.S.	58%	74%	82%	93%	101%	101%	82%	82%
United Arab Emirates	48%	50%	45%	48%	54%	55%	56%	62%
United Kingdom	26%	28%	30%	38%	36%	43%	53%	54%

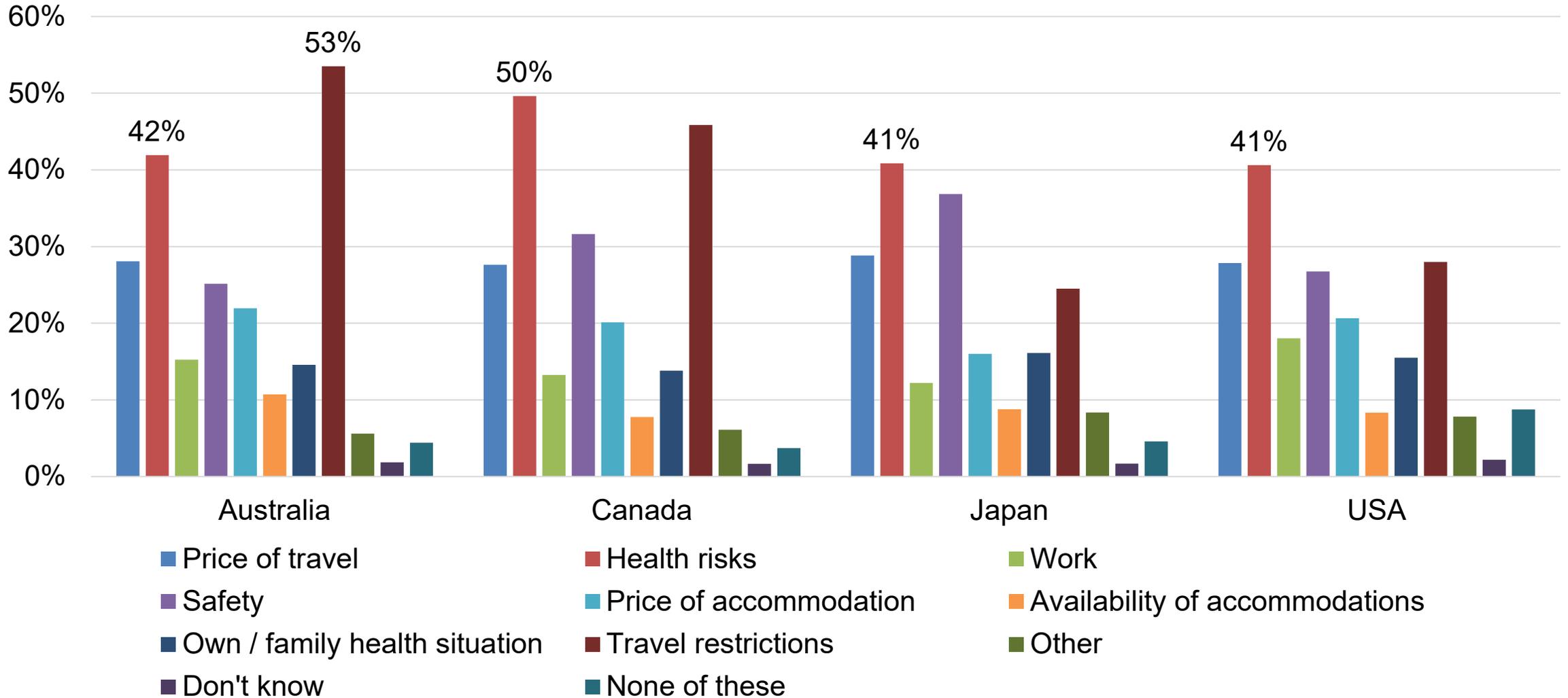
Source: Skift Research

YouGov Trips Planned in the Next 12 Months



Source: YouGov Global Travel Profiles, October 17, 2021

YouGov Obstacles to Travel



Source: YouGov Global Travel Profiles, October 17, 2021

Destination Hawaii

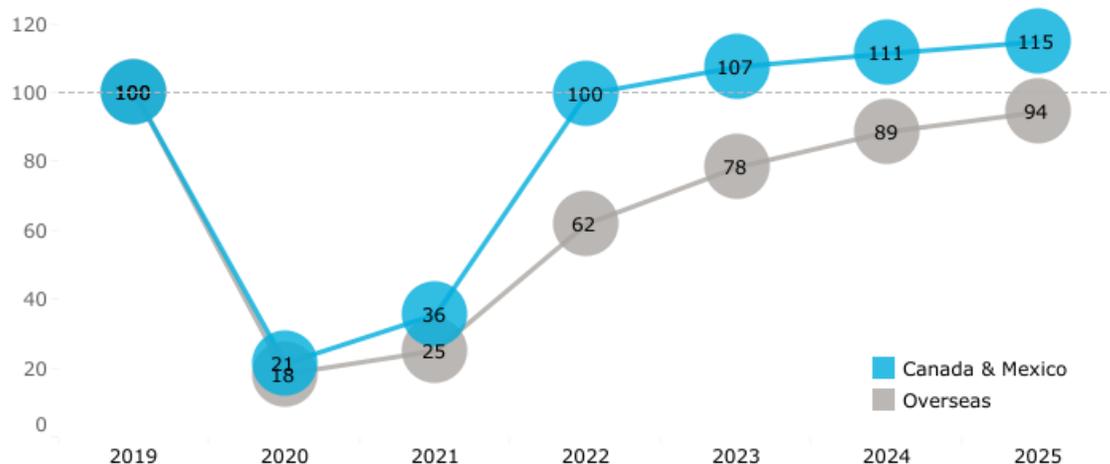
Visitor Arrivals

Hawaii, (Index 2019=100)



Spending by Visitors

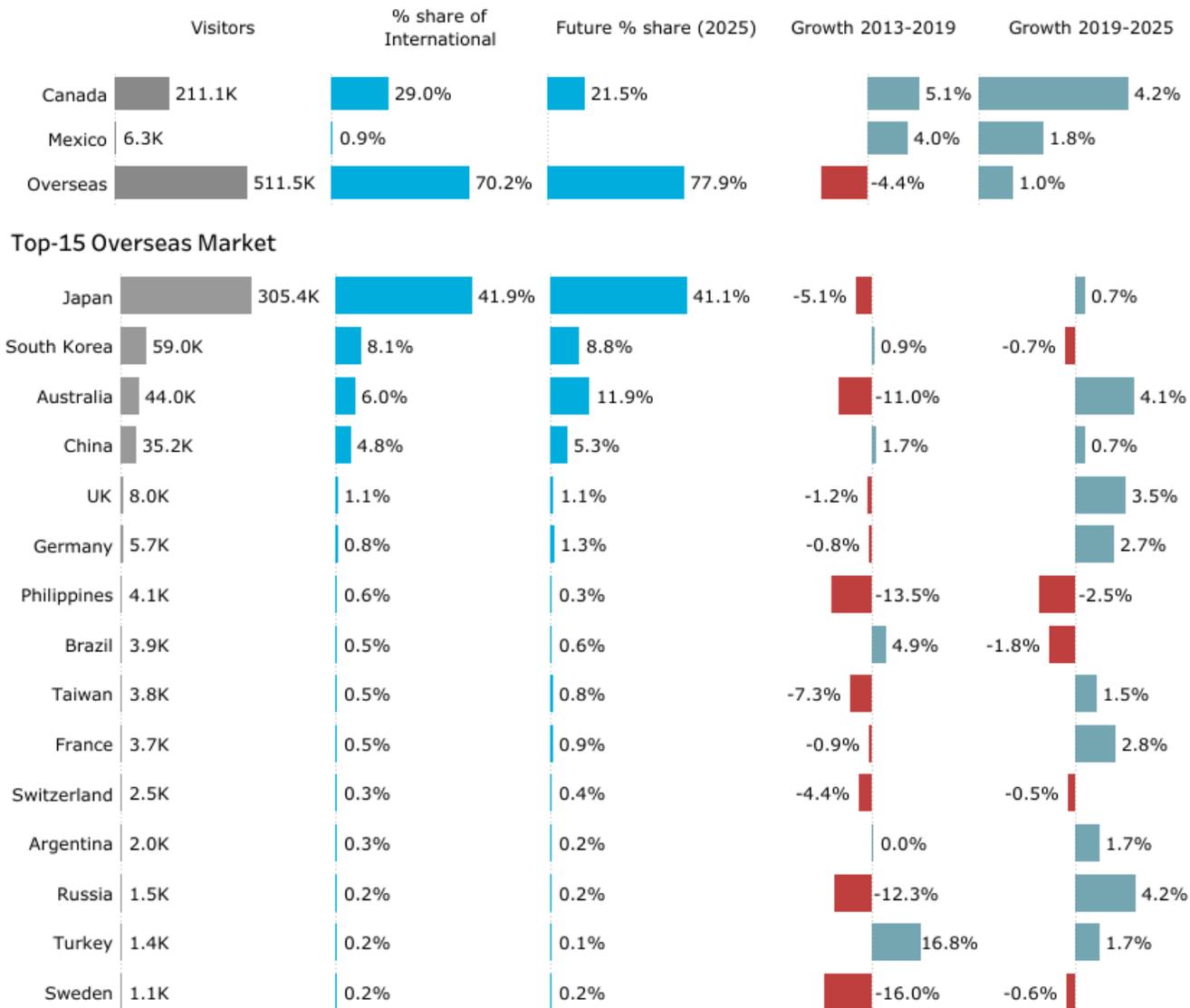
Hawaii, (Index 2019= 100)



International Visitation Outlook by Country

Top-Countries ranked by inbound visits in 2021 to Hawaii

Year
2021



* Growth rate is CAGR

TRAVEL AGENCY BOOKING TRENDS

OCTOBER 25, 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 October 23, 2021
U.S.



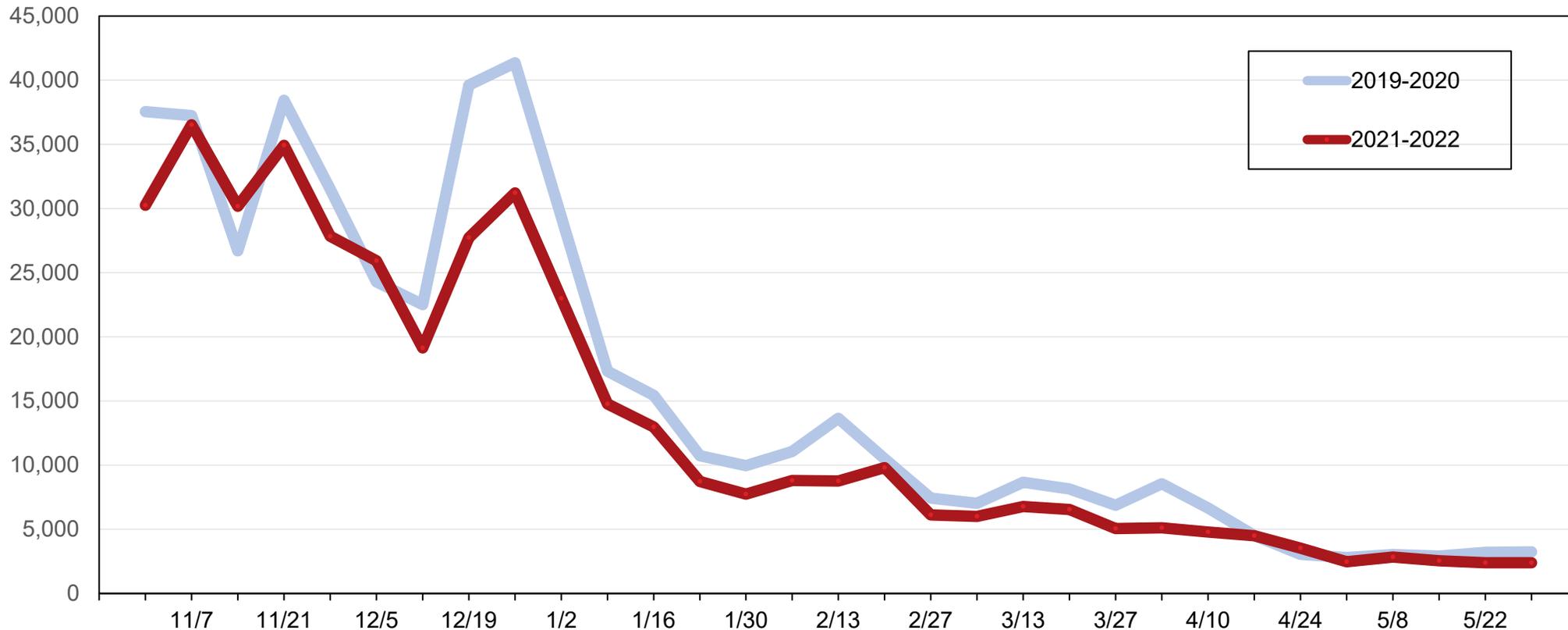
*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.
Source: Global Agency Pro

Update: Oct 23, 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 October 23, 2021
U.S.

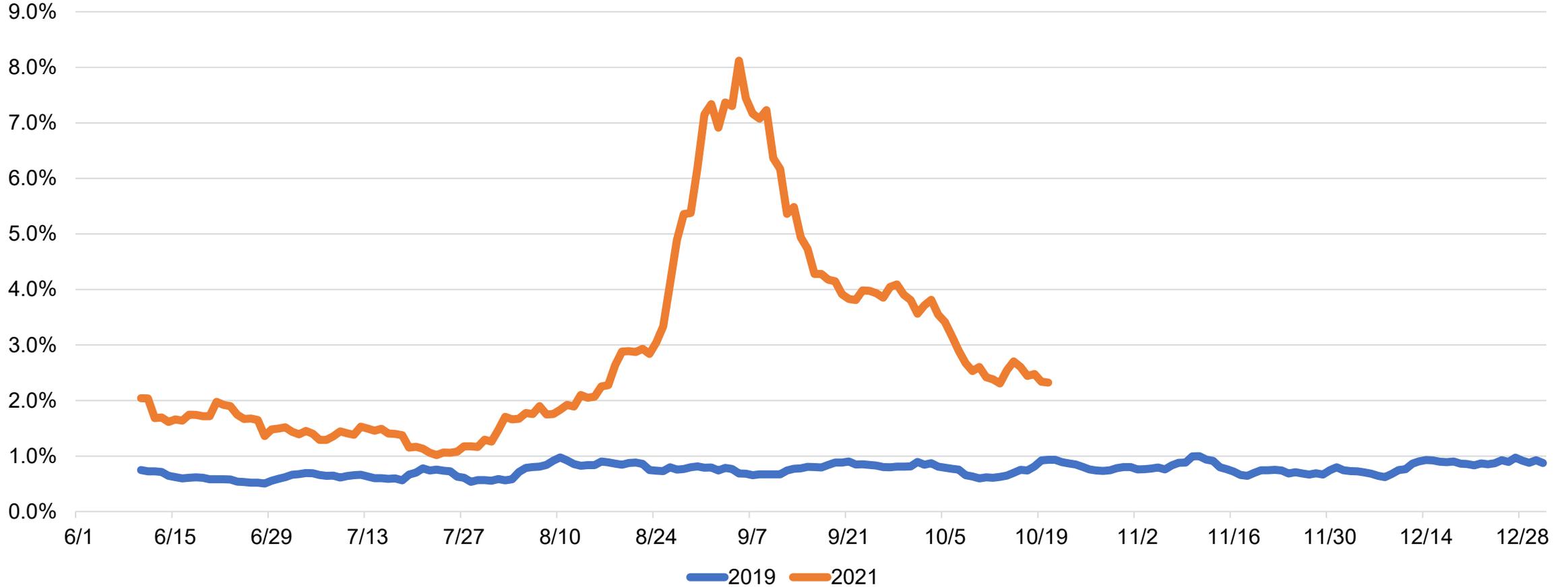


Source: Global Agency Pro, as of October 23, 2021

Source: Global Agency Pro

Travel Agency Bookings to Hawai'i for Future Arrivals

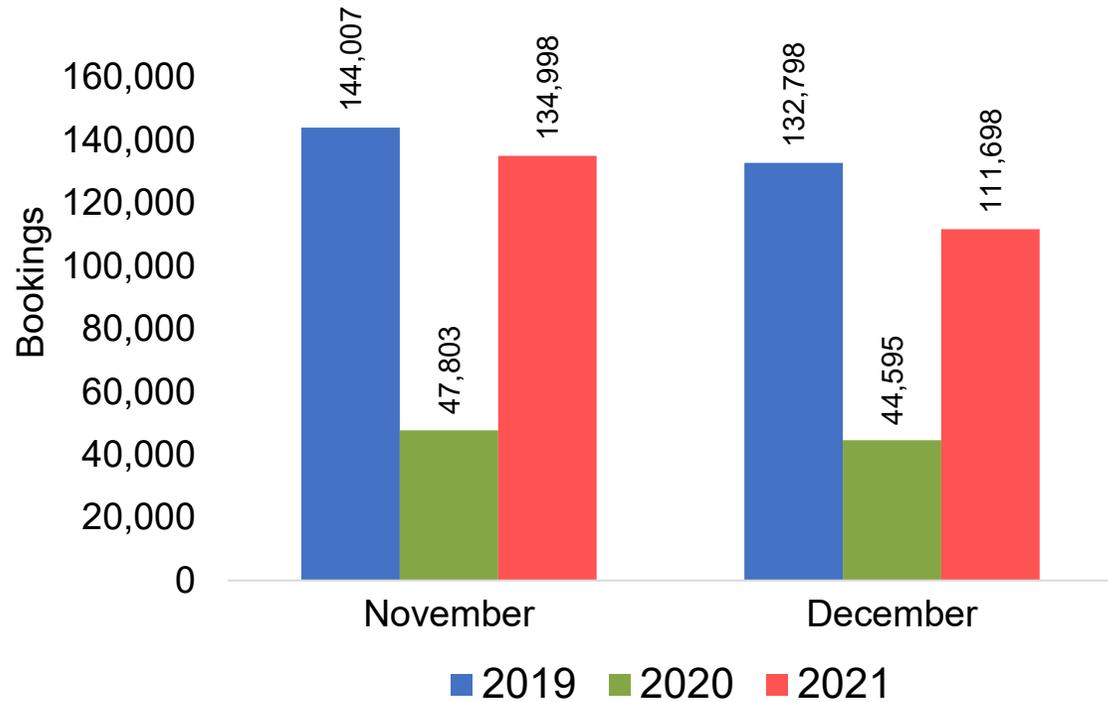
Travel Agency Cancellations/Rebookings as a Percentage of Total Ticket Transactions for Future Arrivals to Hawaii (7-Day Moving Average) 2021 vs 2019



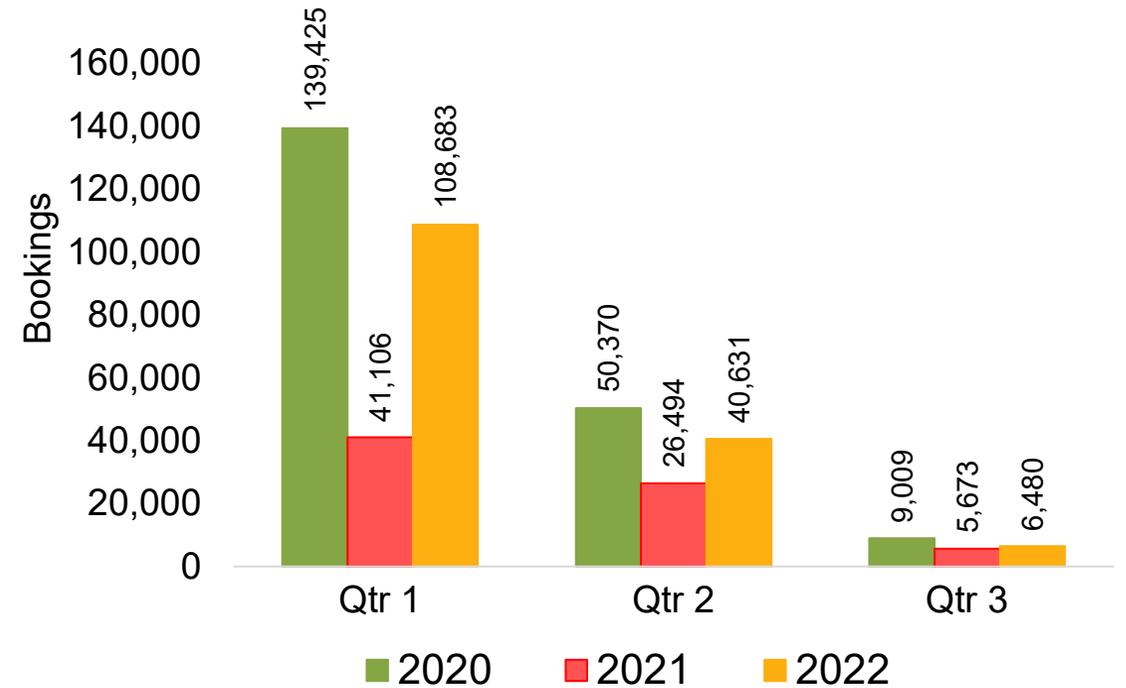
Source: Global Agency Pro

US

Travel Agency Booking Pace for Future Arrivals, by Month

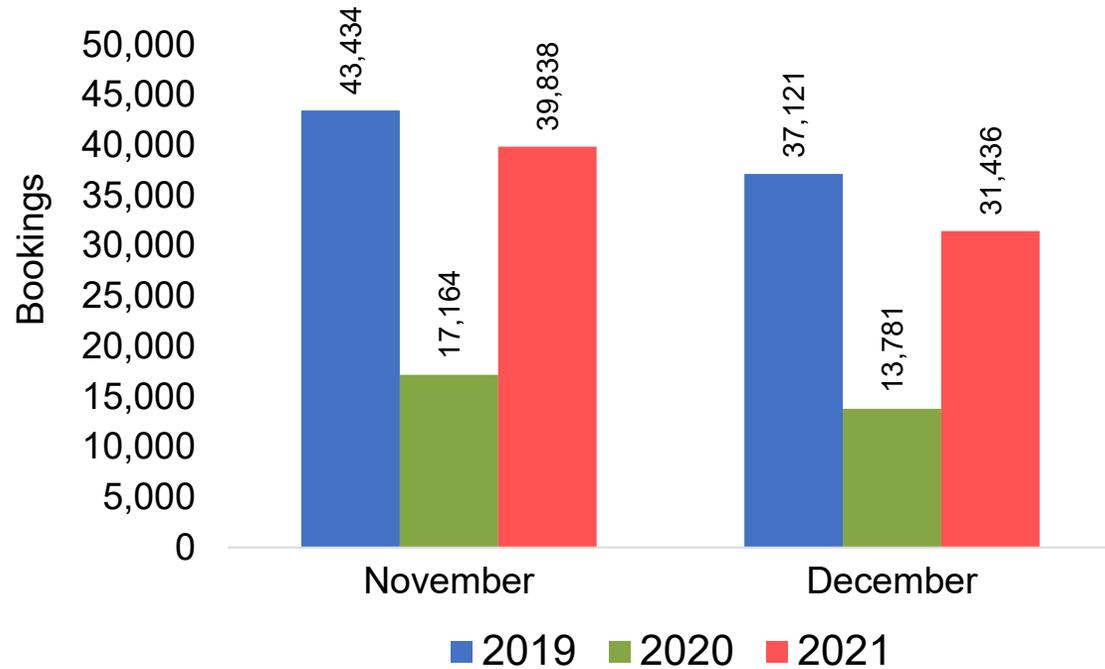


Travel Agency Booking Pace for Future Arrivals, by Quarter

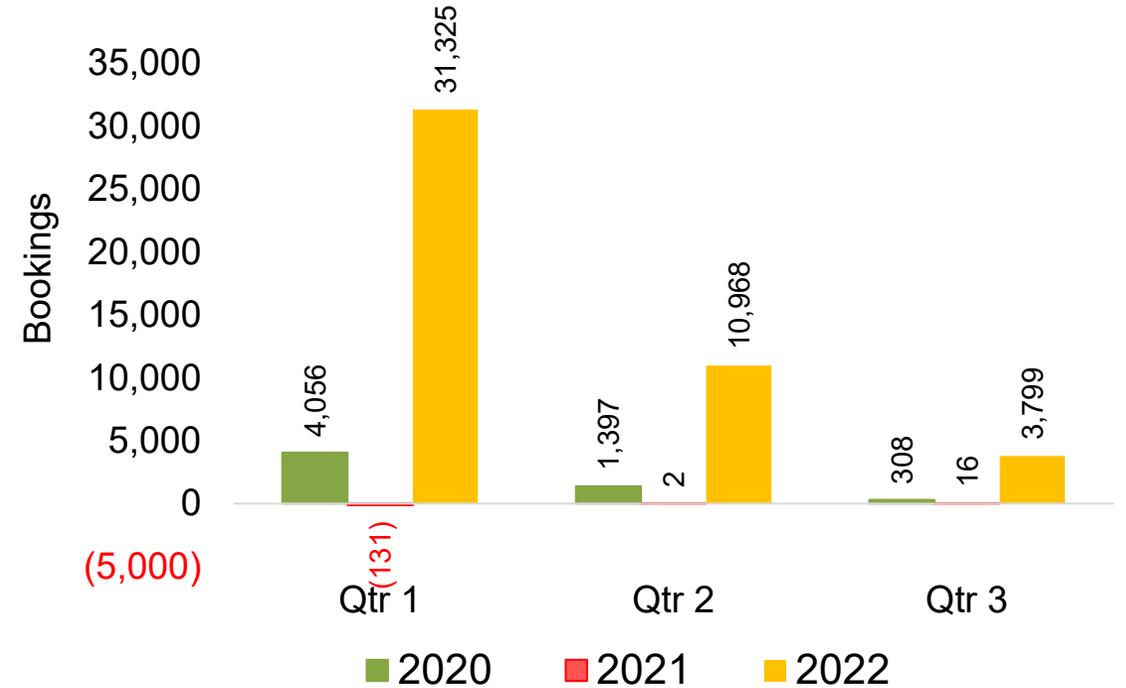


Source: Global Agency Pro as of 10/23/21

Travel Agency Booking Pickup for Future Arrivals, by Month



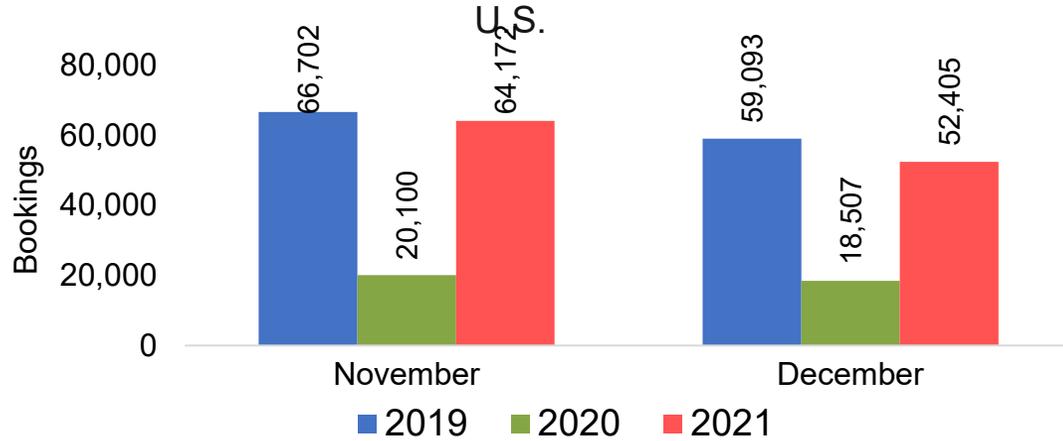
Travel Agency Booking Pickup for Future Arrivals, by Quarter



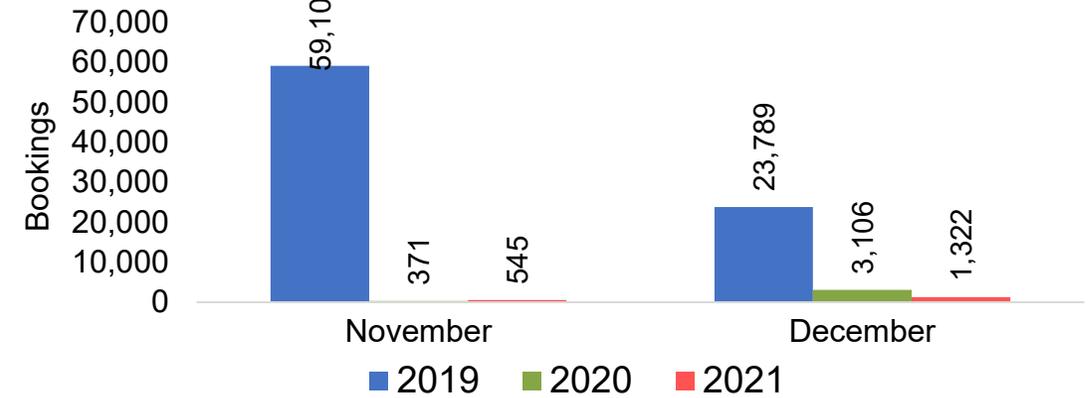
Source: Global Agency Pro as of 10/23/21

O'ahu by Month 2021

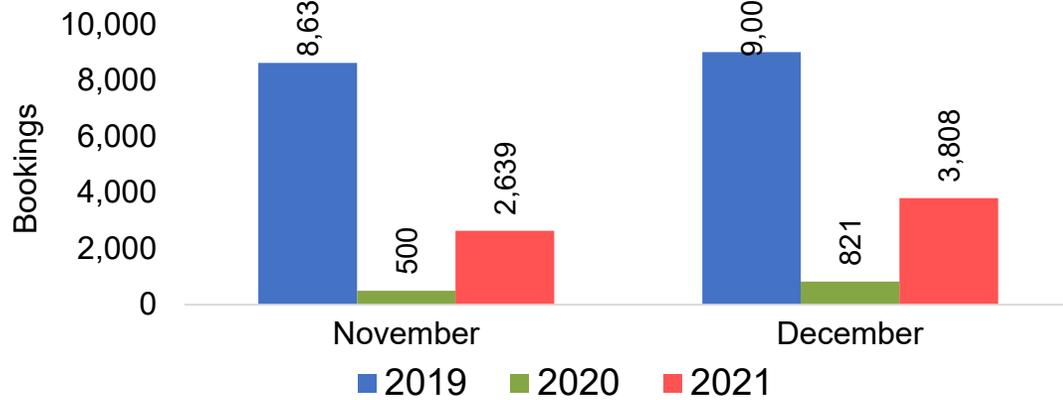
Travel Agency Booking Pace for Future Arrivals



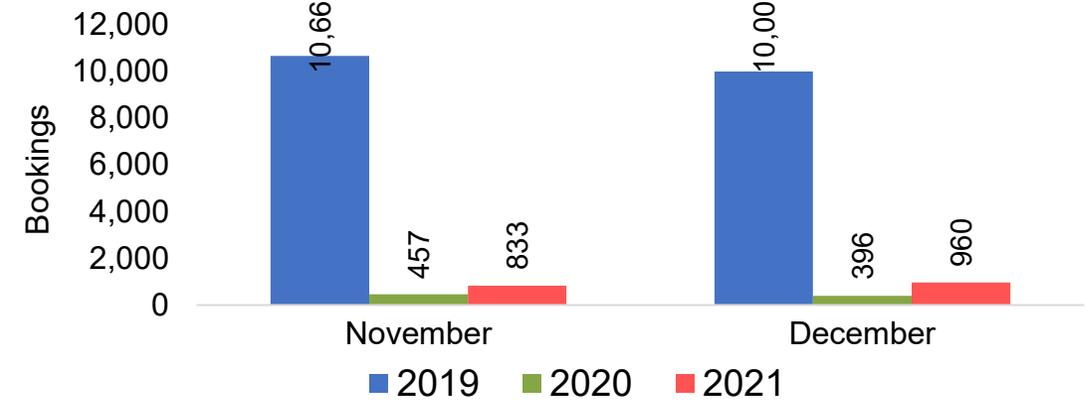
Travel Agency Booking Pace for Future Arrivals Japan



Travel Agency Booking Pace for Future Arrivals Canada



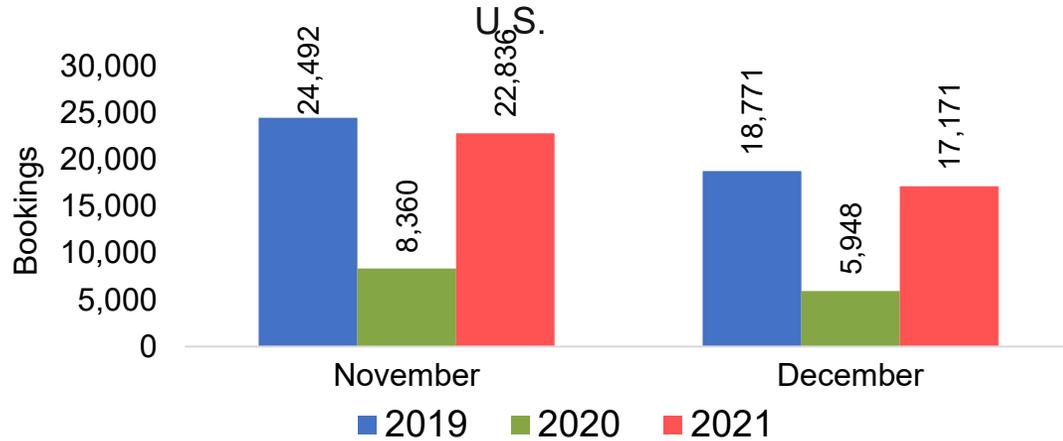
Travel Agency Booking Pace for Future Arrivals Korea



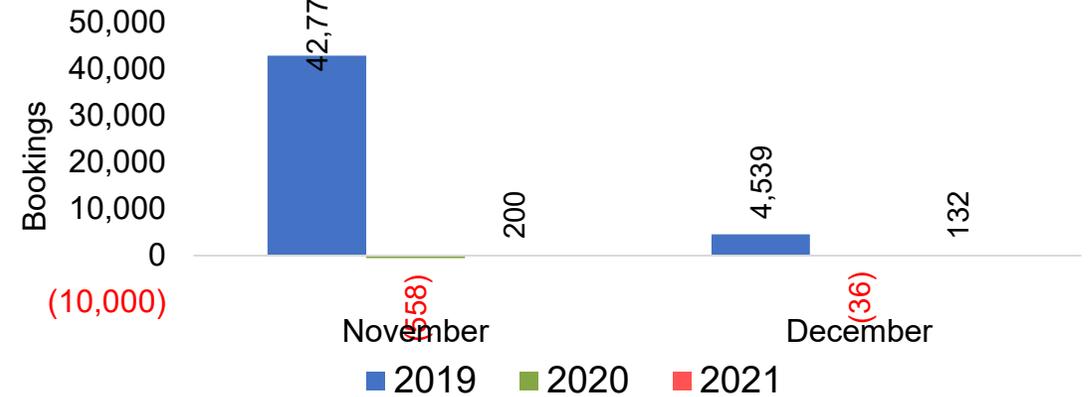
Source: Global Agency Pro as of 10/23/21

O'ahu by Month 2021

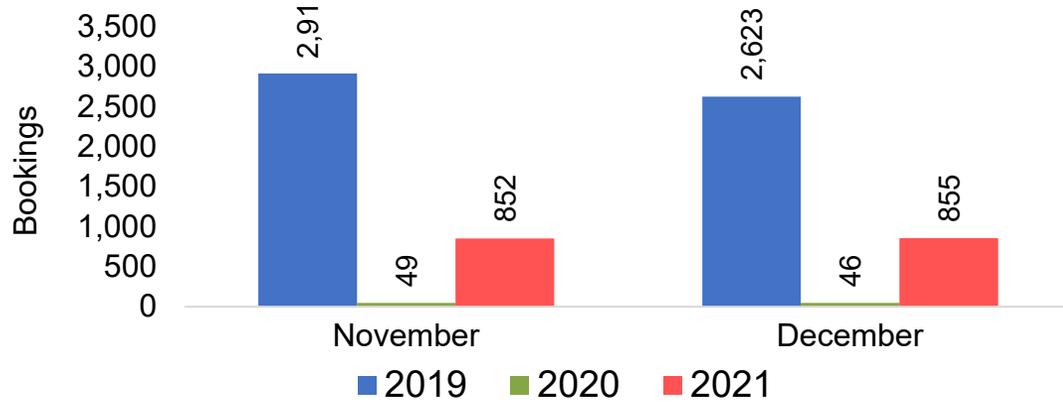
Travel Agency Booking Pickup for Future Arrivals



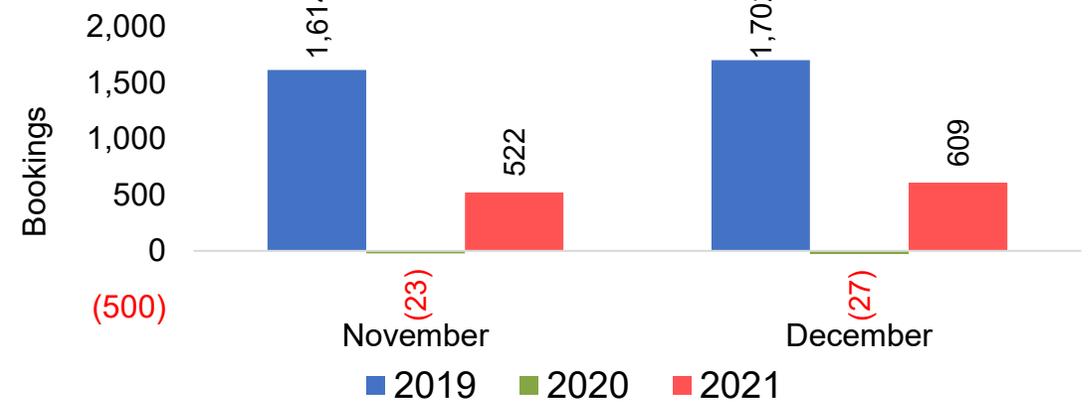
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



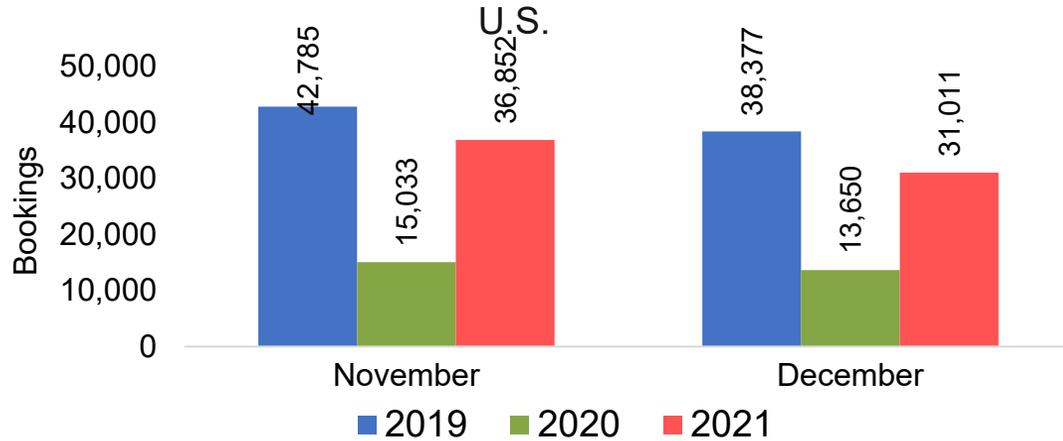
Travel Agency Booking Pickup for Future Arrivals



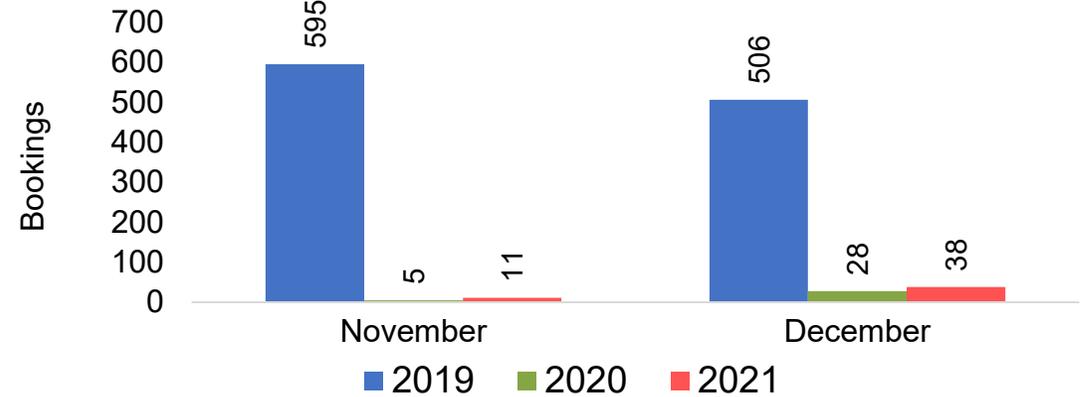
Source: Global Agency Pro as of 10/23/21

Maui by Month 2021

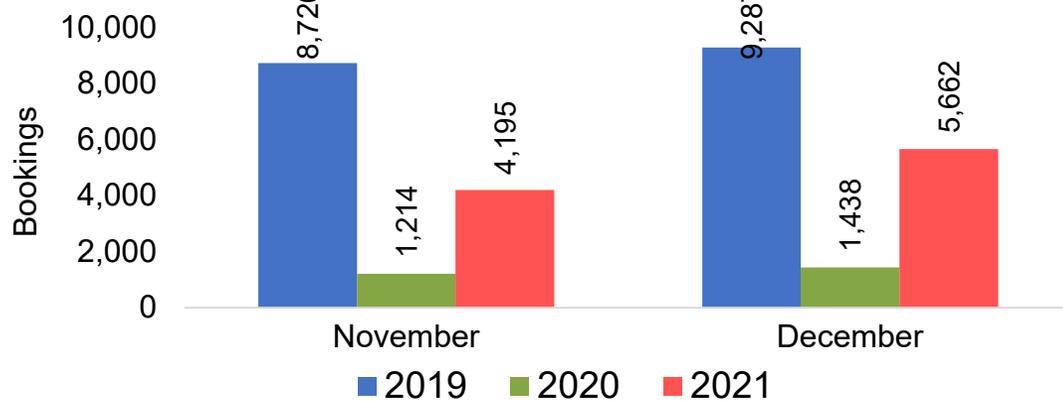
Travel Agency Booking Pace for Future Arrivals



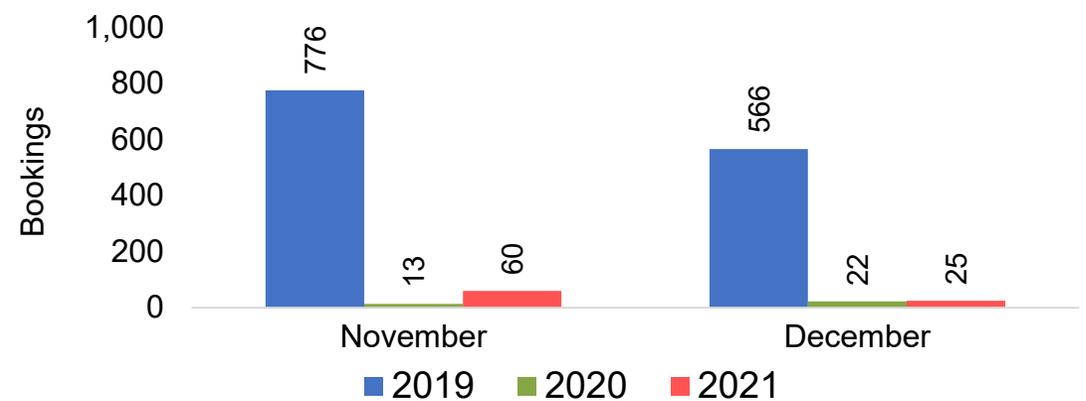
Travel Agency Booking Pace for Future Arrivals
Japan



Travel Agency Booking Pace for Future Arrivals
Canada



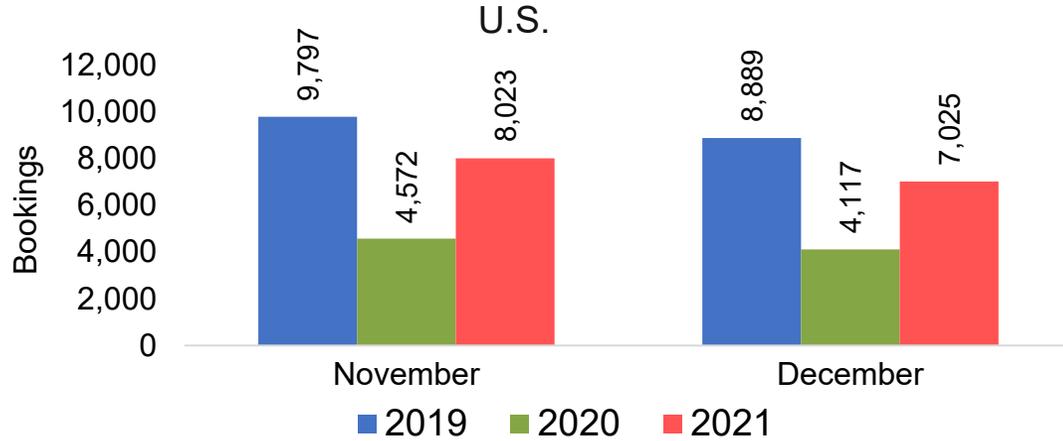
Travel Agency Booking Pace for Future Arrivals
Korea



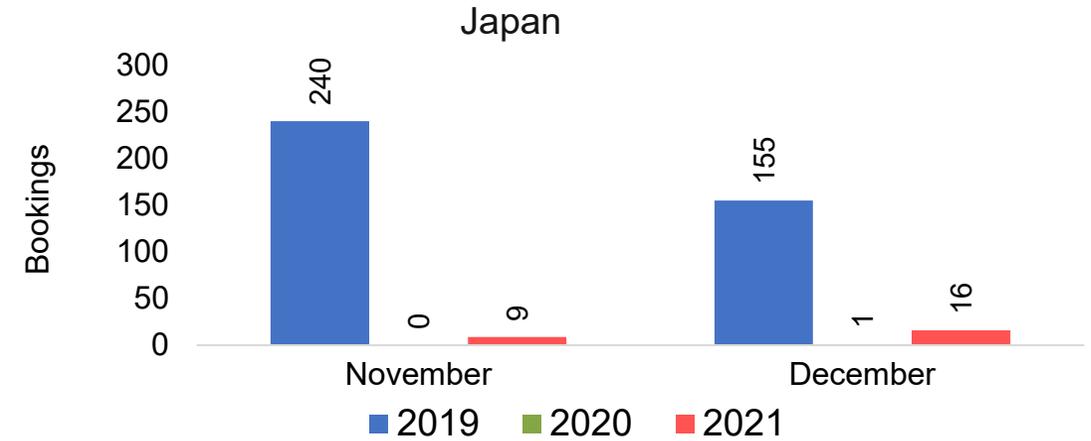
Source: Global Agency Pro as of 10/23/21

Maui by Month 2021

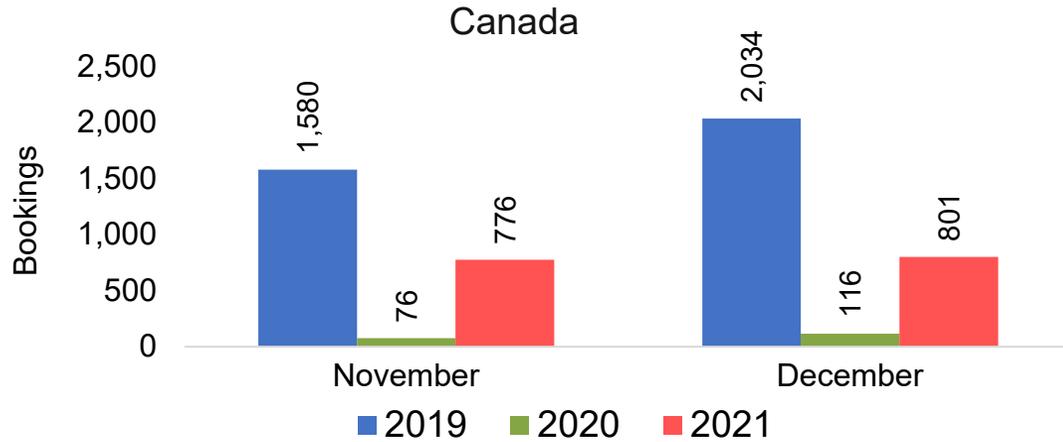
Travel Agency Booking Pickup for Future Arrivals



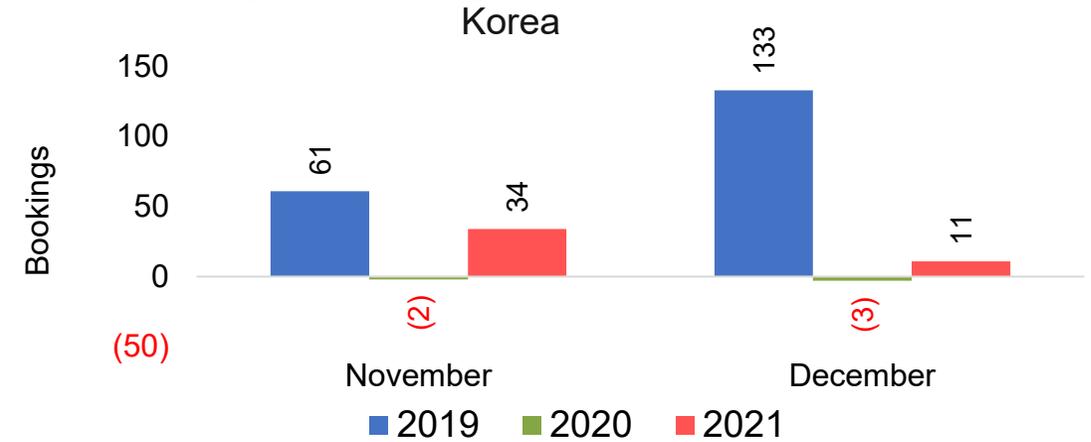
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



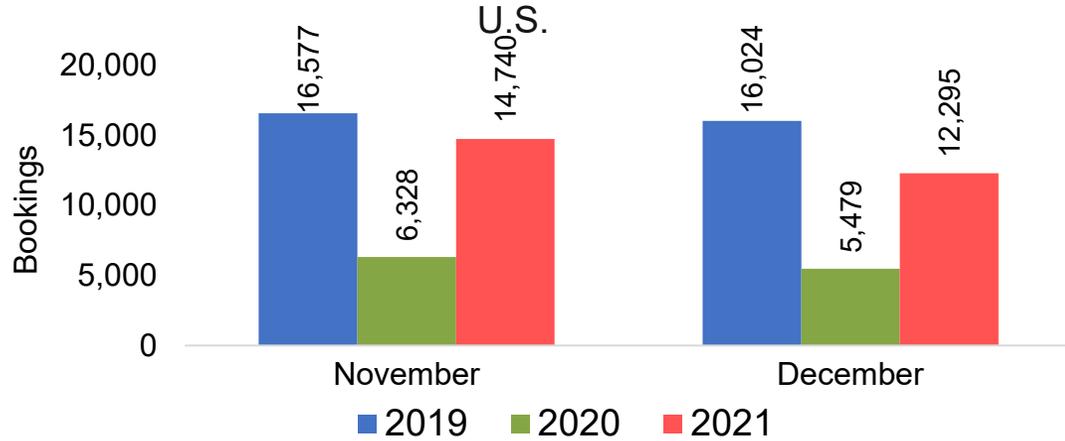
Travel Agency Booking Pickup for Future Arrivals



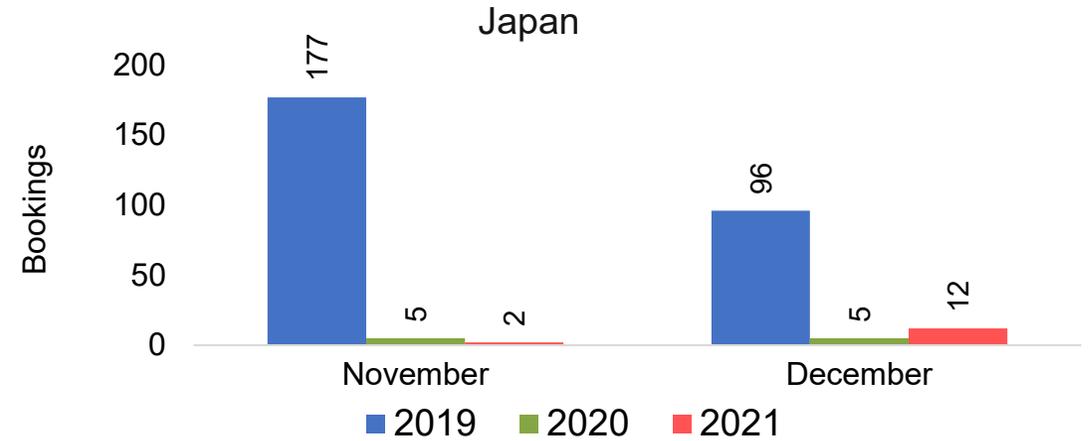
Source: Global Agency Pro as of 10/23/21

Kaua'i by Month 2021

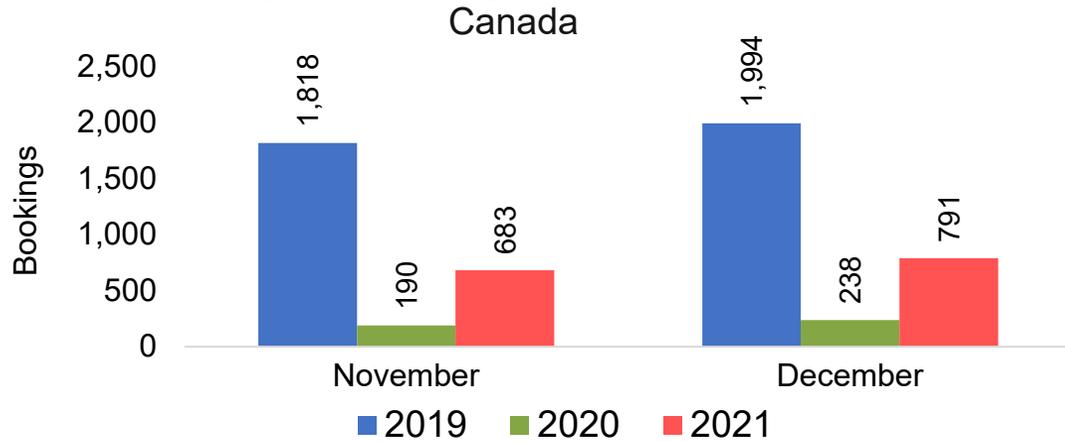
Travel Agency Booking Pace for Future Arrivals



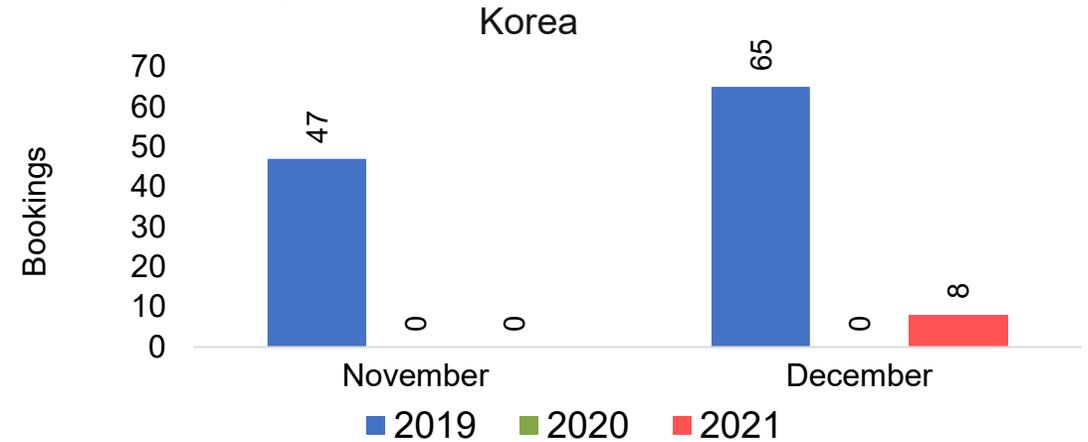
Travel Agency Booking Pace for Future Arrivals



Travel Agency Booking Pace for Future Arrivals



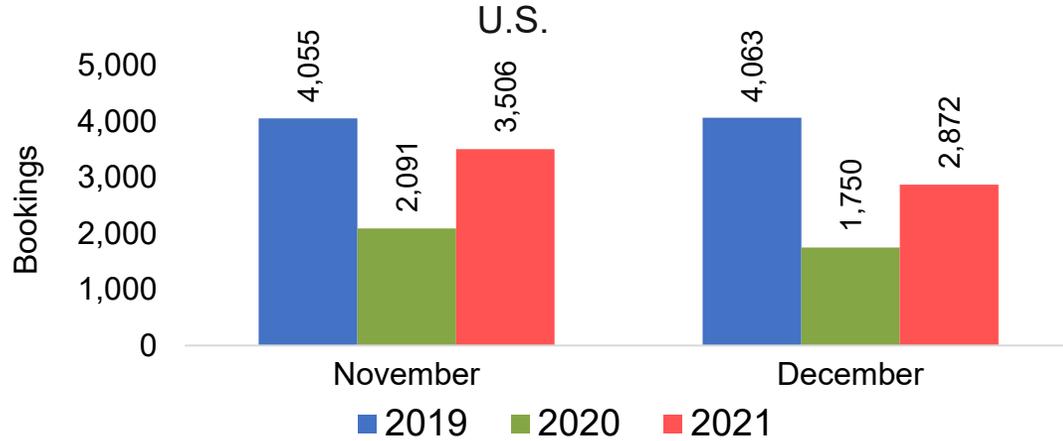
Travel Agency Booking Pace for Future Arrivals



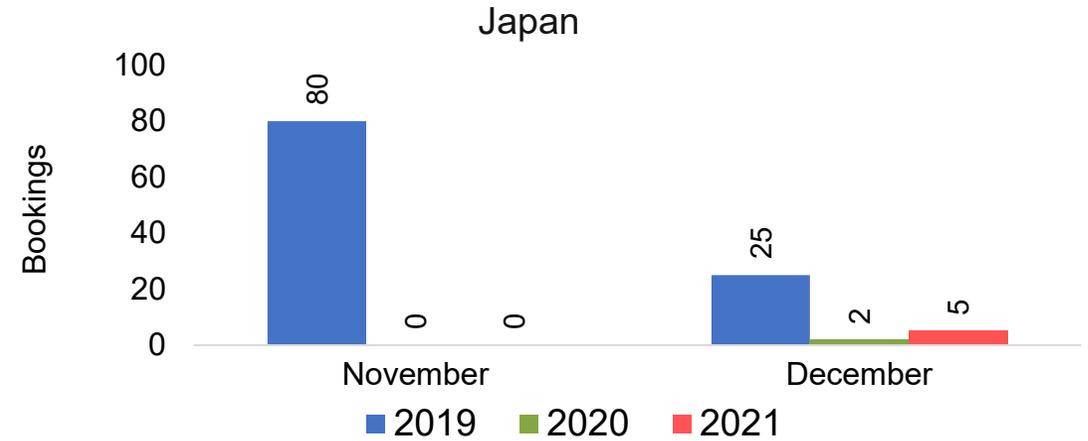
Source: Global Agency Pro as of 10/23/21

Kaua'i by Month 2021

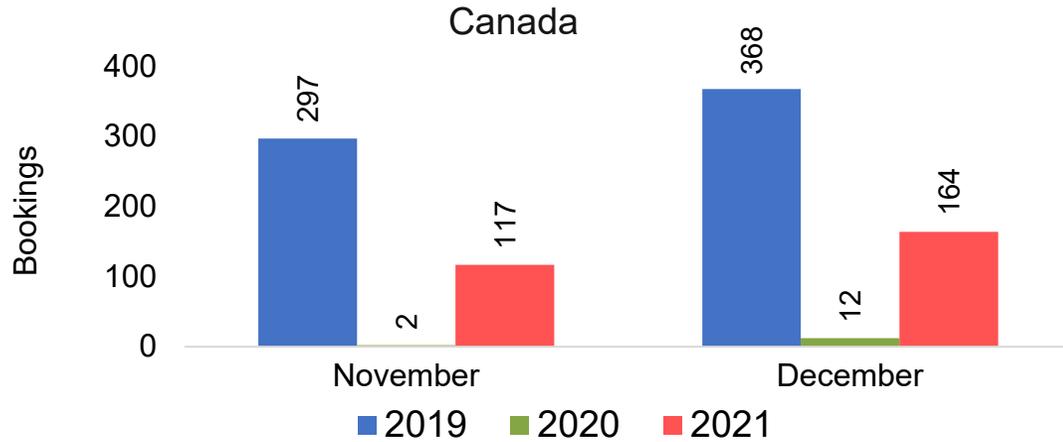
Travel Agency Booking Pickup for Future Arrivals



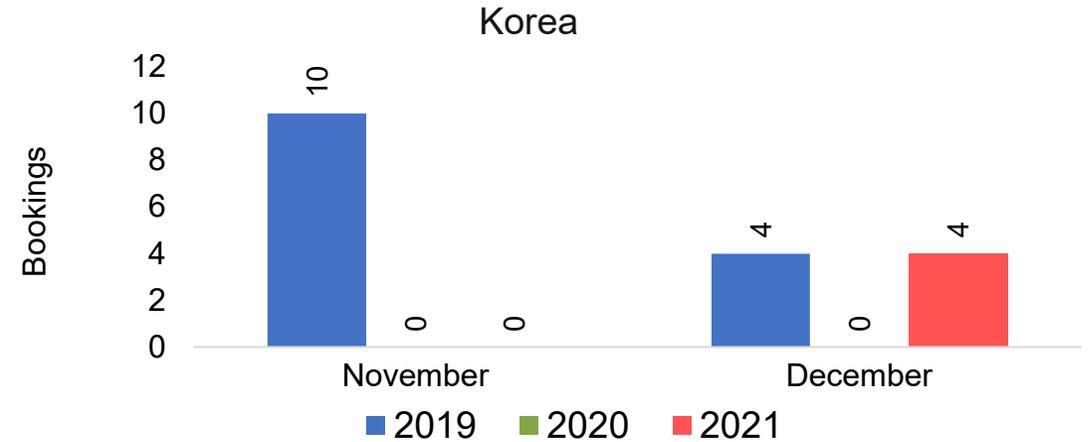
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



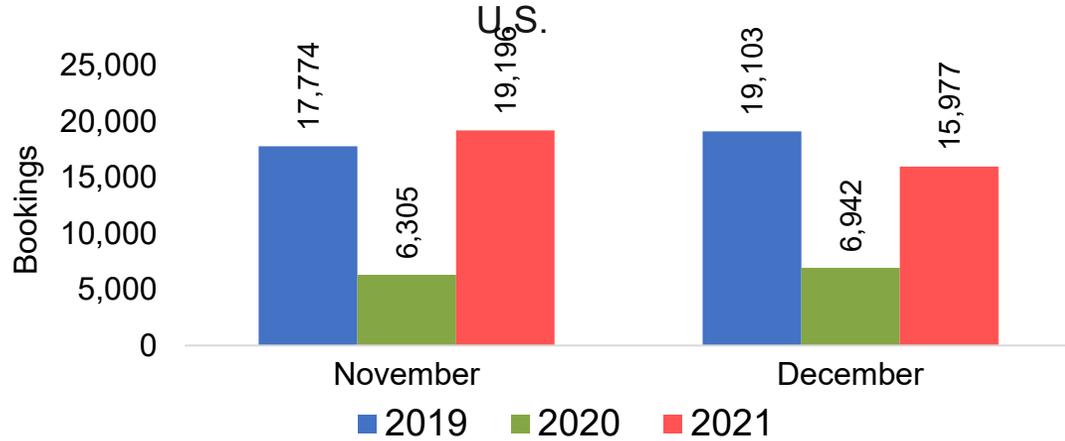
Travel Agency Booking Pickup for Future Arrivals



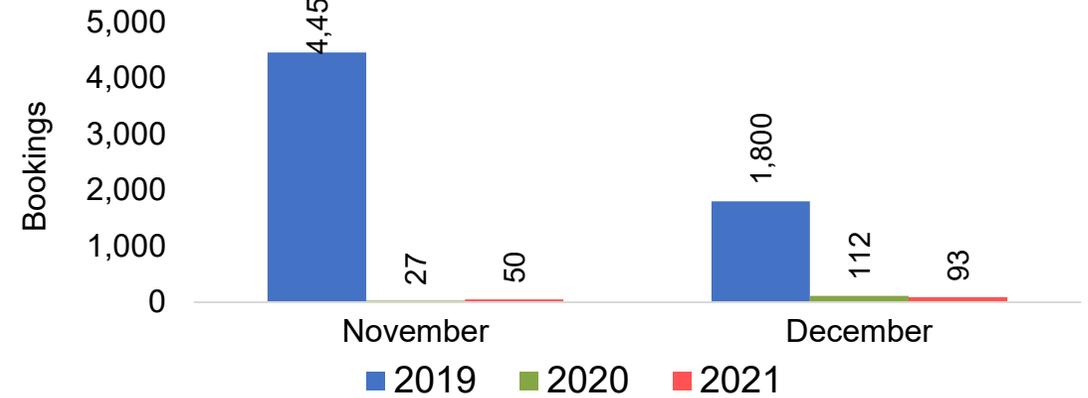
Source: Global Agency Pro as of 10/23/21

Hawai'i Island by Month 2021

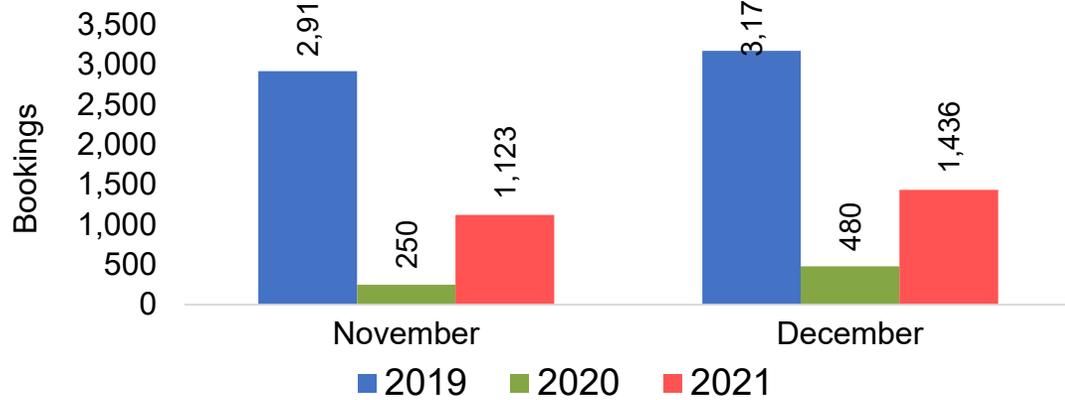
Travel Agency Booking Pace for Future Arrivals



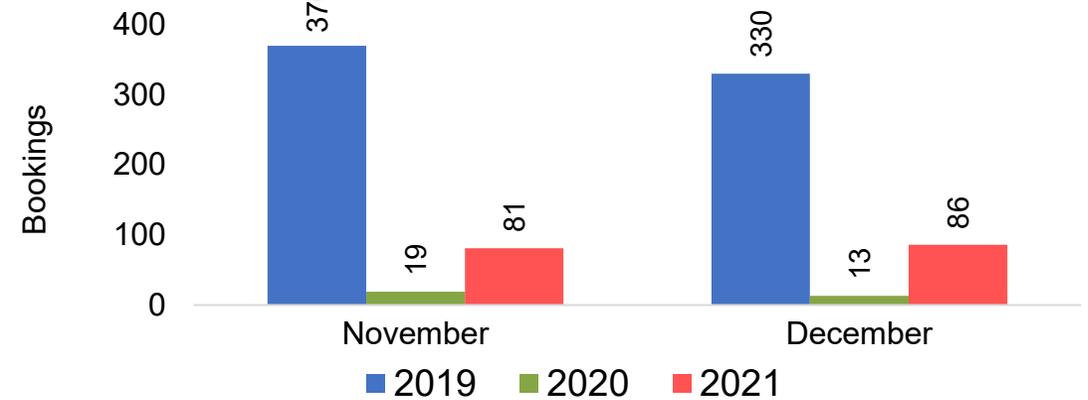
Travel Agency Booking Pace for Future Arrivals



Travel Agency Booking Pace for Future Arrivals



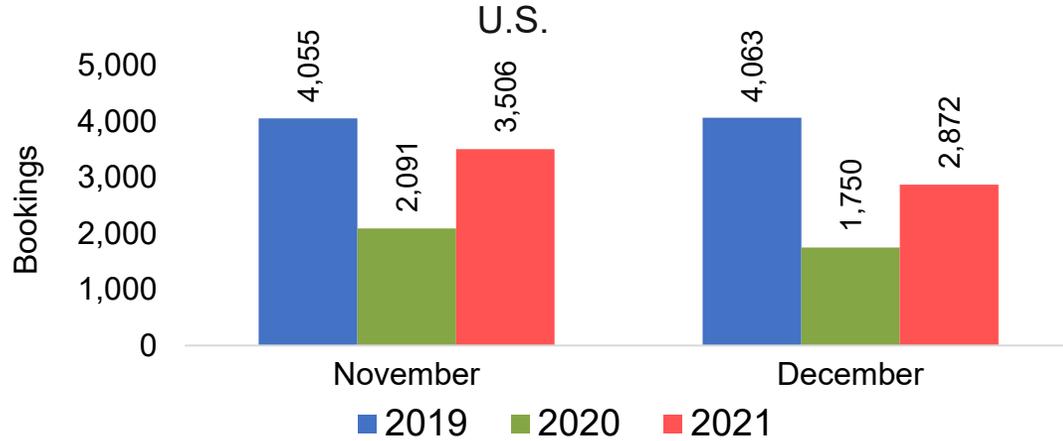
Travel Agency Booking Pace for Future Arrivals



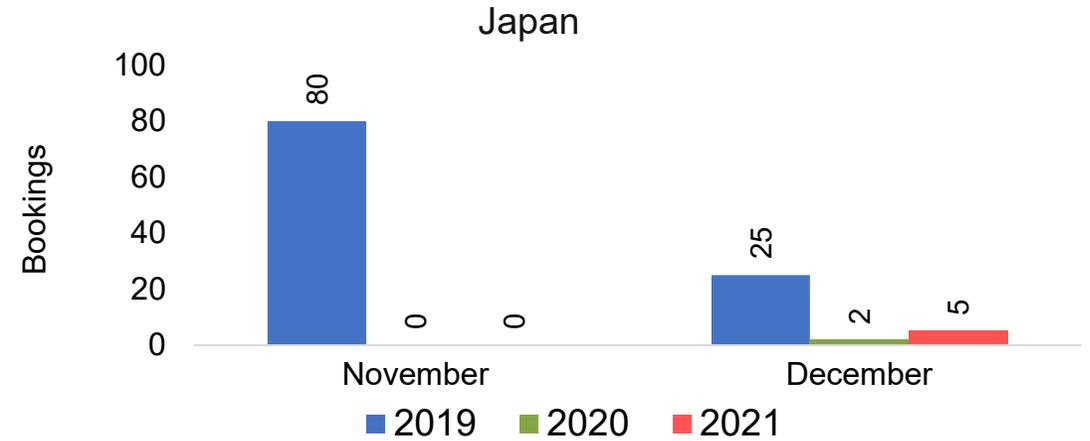
Source: Global Agency Pro as of 10/23/21

Kaua'i by Month 2021

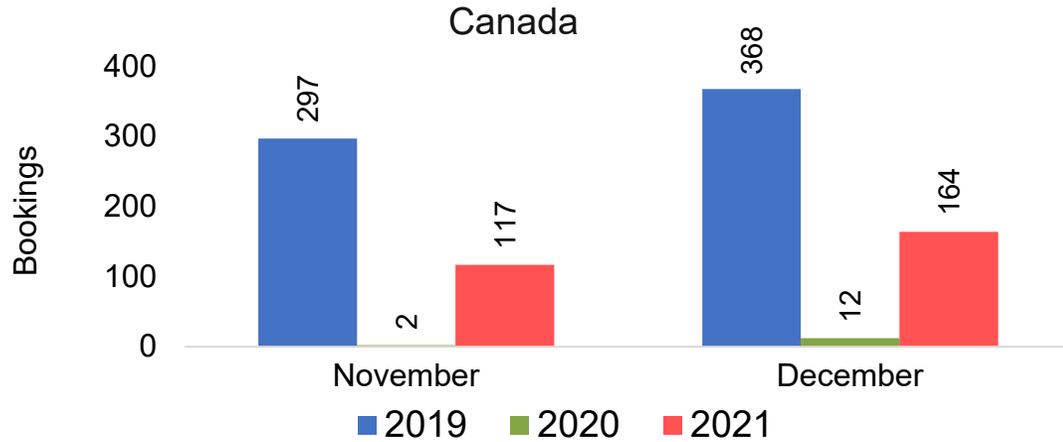
Travel Agency Booking Pickup for Future Arrivals



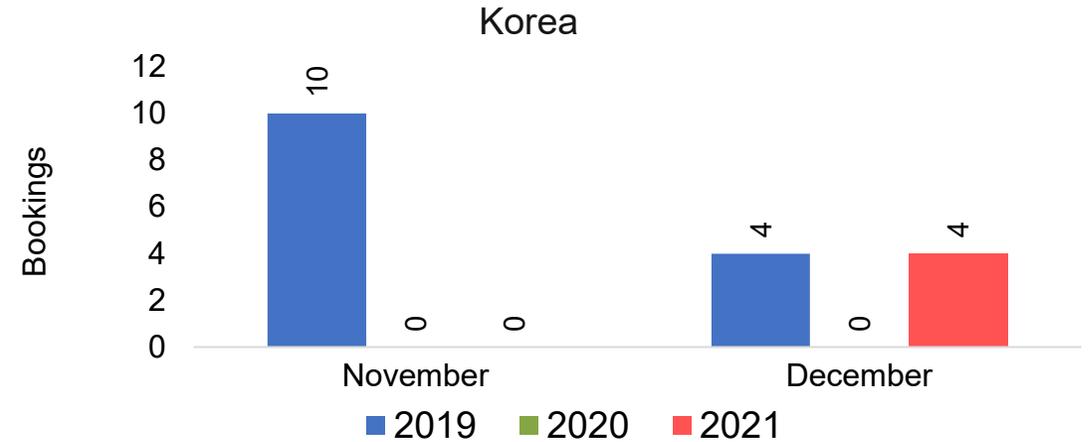
Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



Travel Agency Booking Pickup for Future Arrivals



Source: Global Agency Pro as of 10/23/21

MAHALO!

