

DIRECT AND TRAVEL AGENCY AIR BOOKING TRENDS

OCTOBER 7, 2024



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM



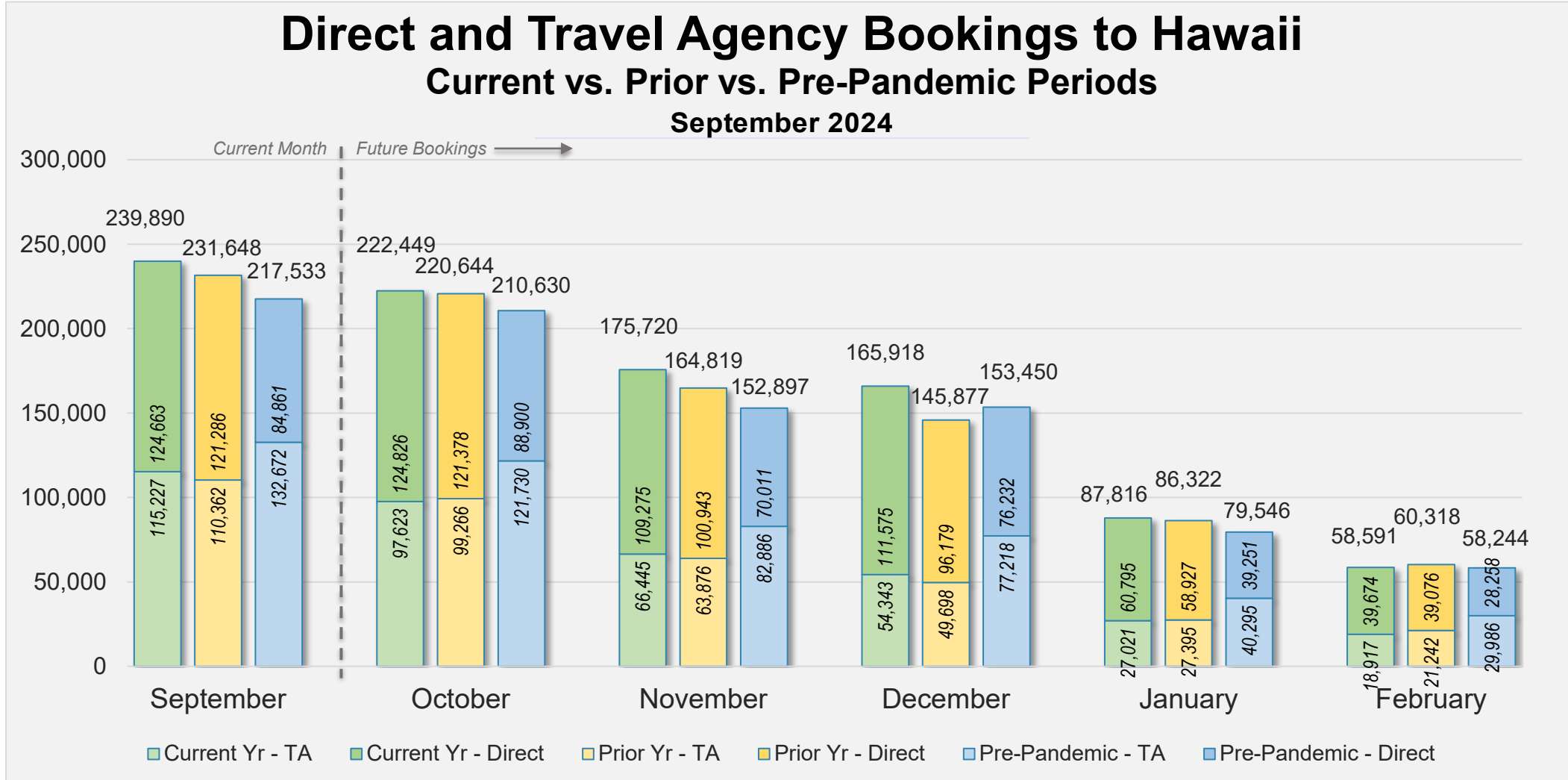
Forward Keys

- DBEDT/HTA subscribes to Forward Keys, an online travel distribution system consisting of bookings ticketed through GDSs.
- Passenger air traffic information is based on Forward Keys Actual Air Tickets (AAT) data, which is specific to air travel sold by a travel agency. This dataset registers an estimated global coverage of around 96% of all indirect commercial airline tickets sold through travel agencies, equating to an estimated 60%–65% global coverage of commercial airline tickets sold through travel agencies accredited by ARC and IATA.
- Forward Keys AAT historical data coverage starts from 2017 but can be monitored from 2018 onwards as tickets are technically available for travel up to one year in the future. The analysis period used specifically in this report consists of the last 12 months of historical ticketing data (not including pre-pandemic) and six months of advance purchase data.
- Forward Keys AAT data are updated every Saturday covering the period up to the preceding Sunday. Data from previous updates may be modified as airlines may provide tickets at different paces and in some cases may provide ticketing information several weeks after the trip has taken place. This only affects a small portion of the total tickets.

Forward Keys Index

- Bookings
 - Net sum of the number of visitors from Sales transactions counted, including Exchanges and Refunds.
- Current Year / Previous Year / Pre-pandemic
 - In the analysis results, "Current Year" refers to the period being analyzed. "Previous Year" refers to the time unit in the previous year equivalent to the "Current Year" (for year-on-year comparison purposes). "Pre-pandemic" refers to the equivalent period in 2019 to the Current period, using only 2019 data as a reference.
- Direct
 - Refers to tickets purchased directly through the airline, typically via an airline's website.
- Travel Agency
 - Refers to associated with an ARC/IATA number (or otherwise retail).

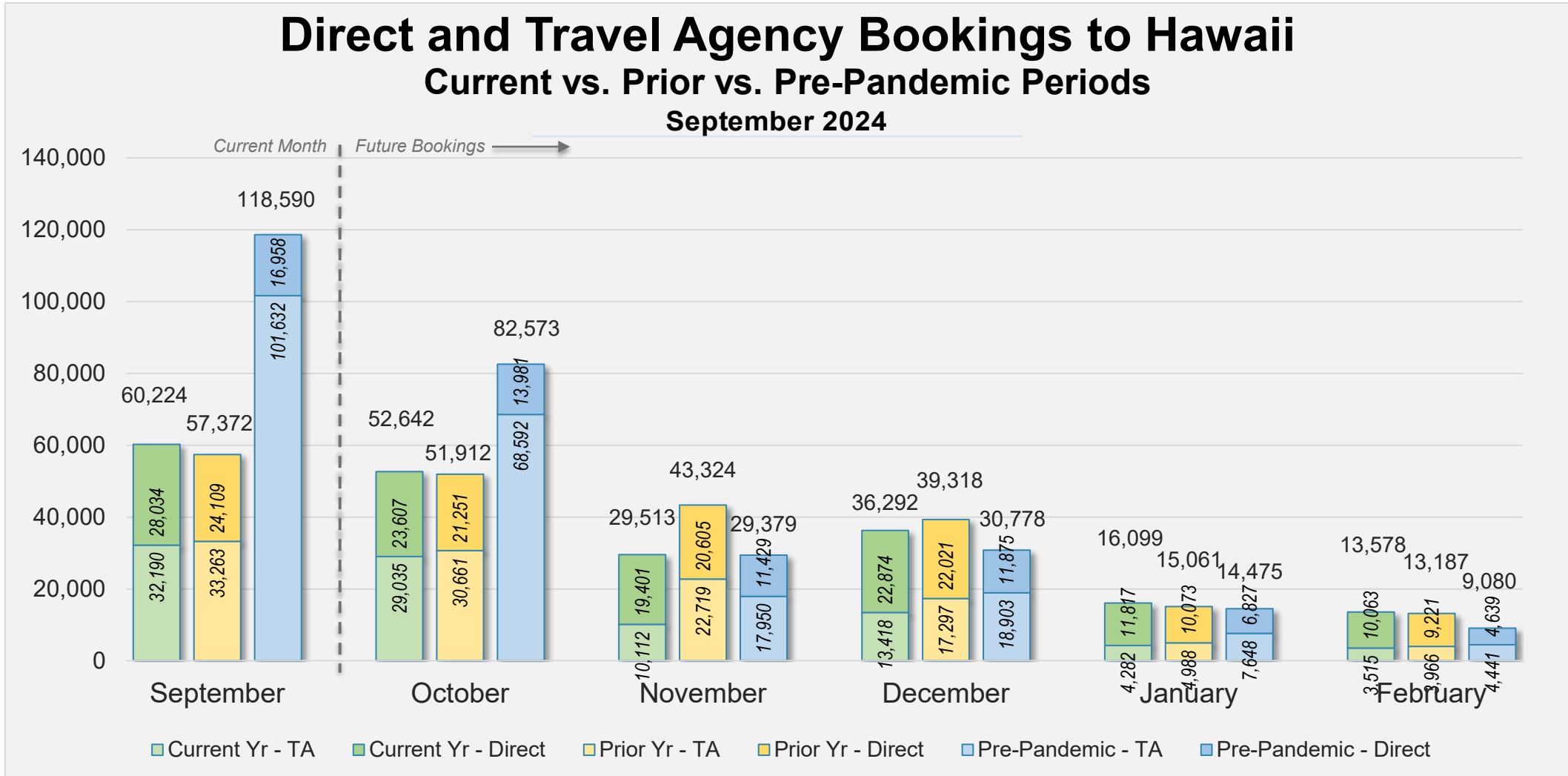
Direct and Travel Agency Bookings to Hawaii Current vs. Prior vs. Pre-Pandemic Periods September 2024



Source: ForwardKeys as of 9/29/24

JAPAN

Direct and Travel Agency Bookings to Hawaii Current vs. Prior vs. Pre-Pandemic Periods September 2024

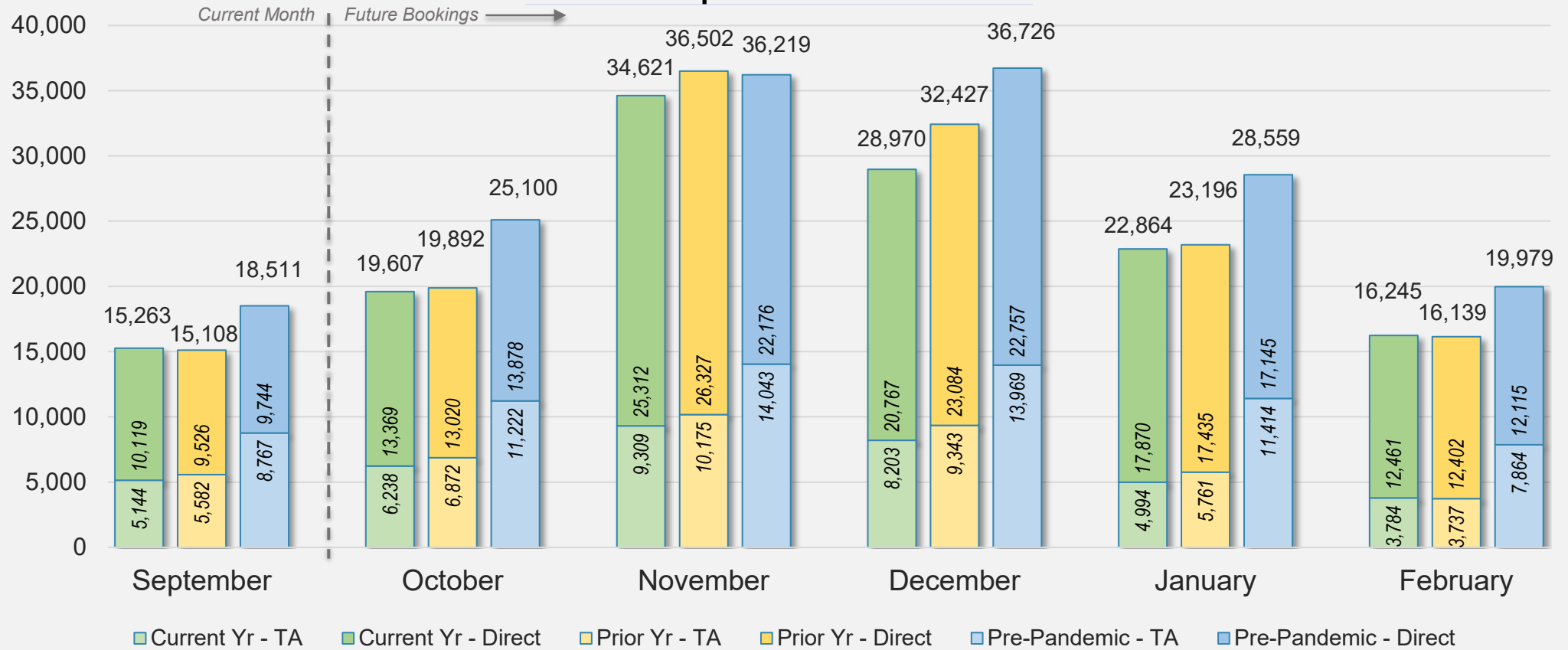


Source: ForwardKeys as of 9/29/24

CANADA

Direct and Travel Agency Bookings to Hawaii Current vs. Prior vs. Pre-Pandemic Periods

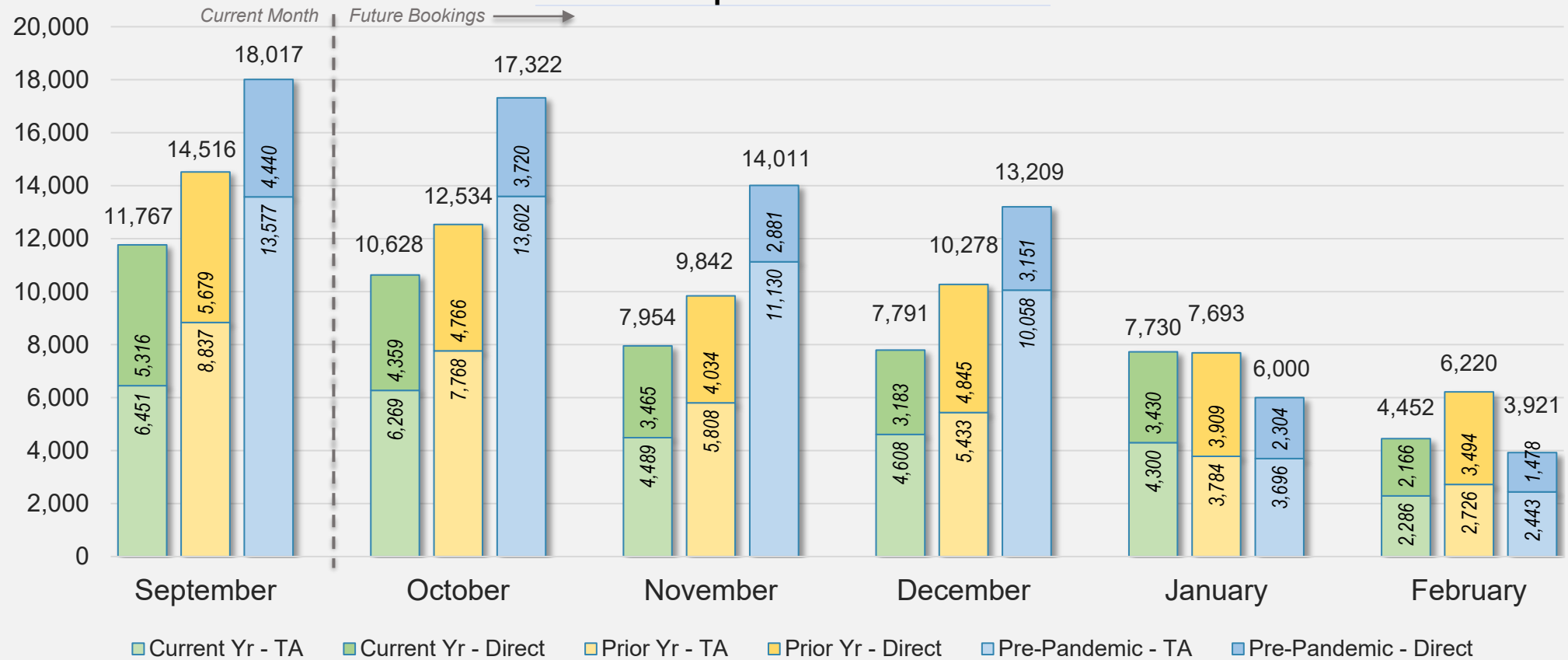
September 2024



Source: ForwardKeys as of 9/29/24

KOREA

Direct and Travel Agency Bookings to Hawaii Current vs. Prior vs. Pre-Pandemic Periods September 2024

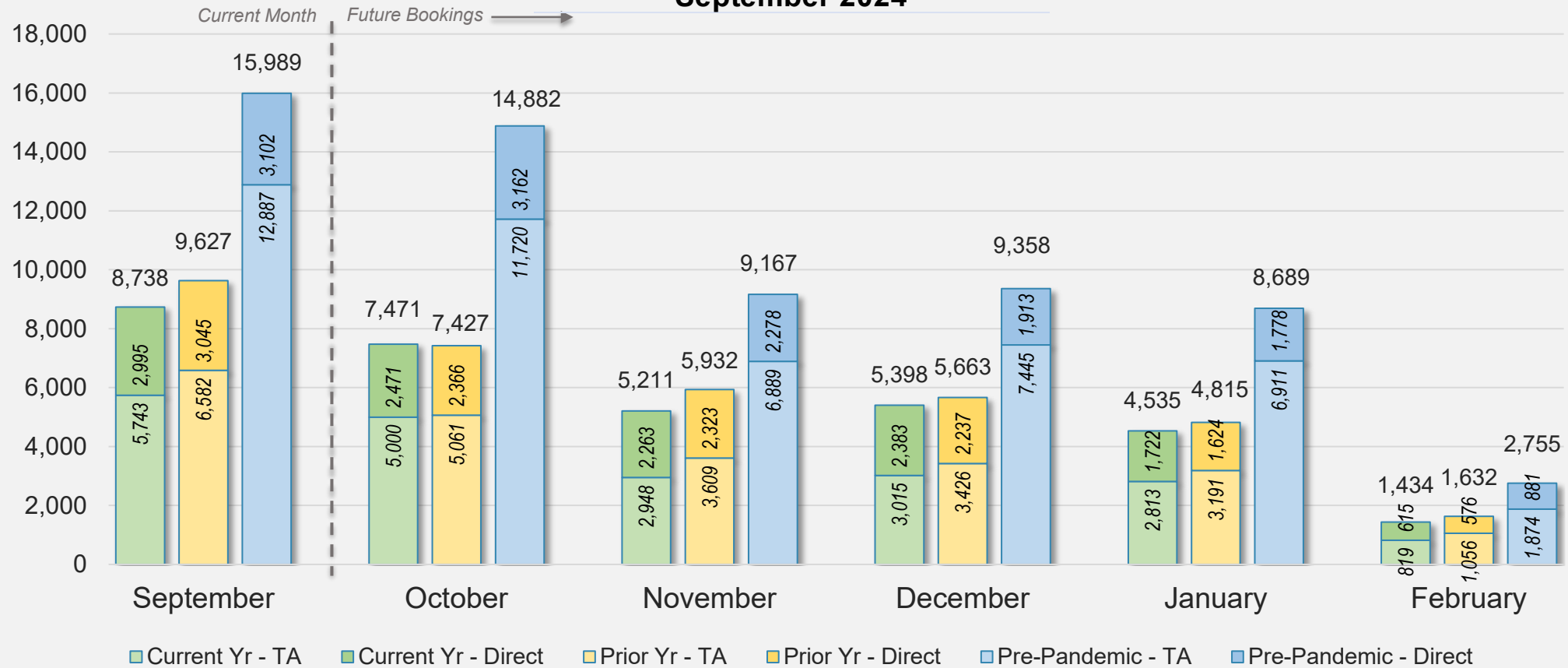


Source: ForwardKeys as of 9/29/24

AUSTRALIA

Direct and Travel Agency Bookings to Hawaii Current vs. Prior vs. Pre-Pandemic Periods

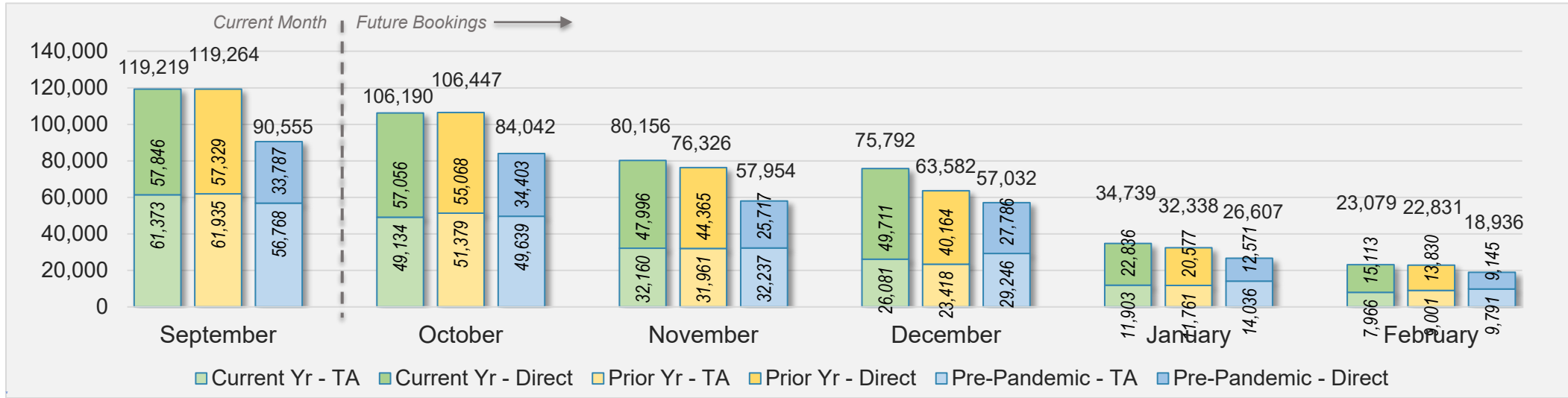
September 2024



Source: ForwardKeys as of 9/29/24

September 2024 Direct and Travel Agency Bookings to Hawai'i

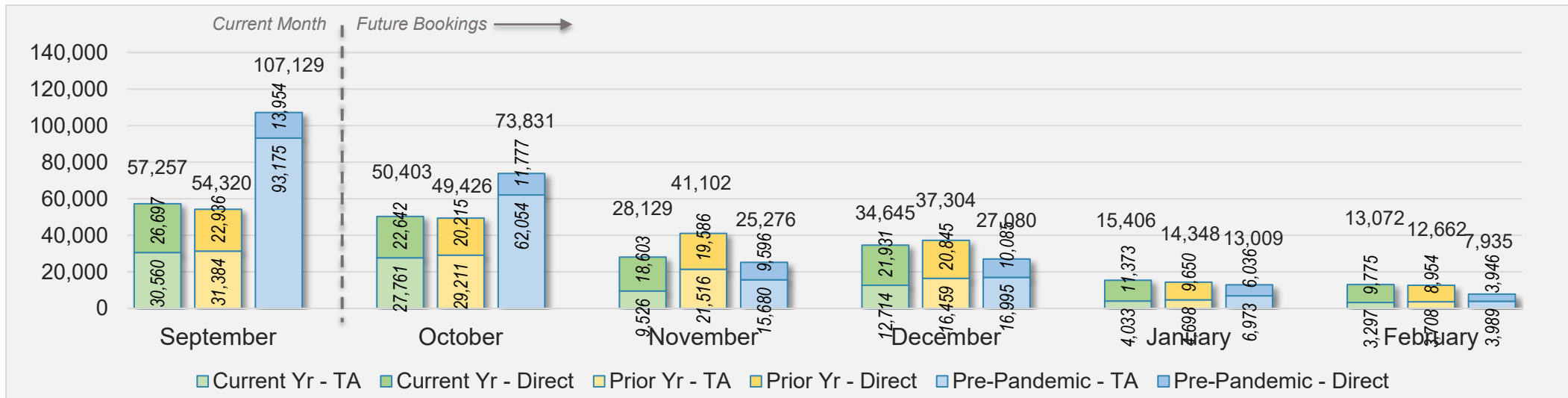
U.S.



Source: ForwardKeys as of 9/29/24

September 2024 Direct and Travel Agency Bookings to Hawai'i

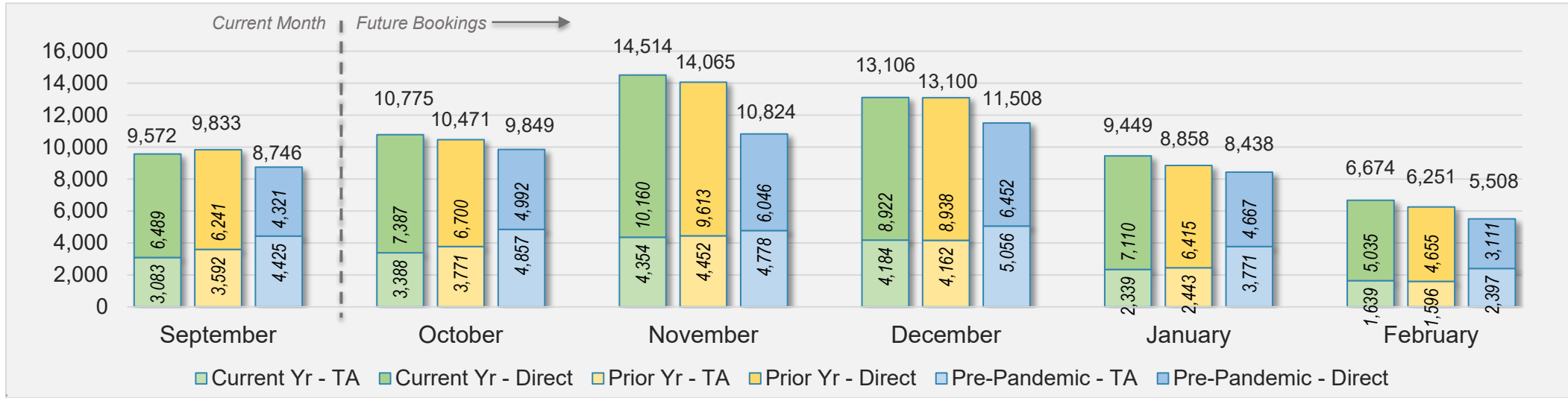
JAPAN



Source: ForwardKeys as of 9/29/24

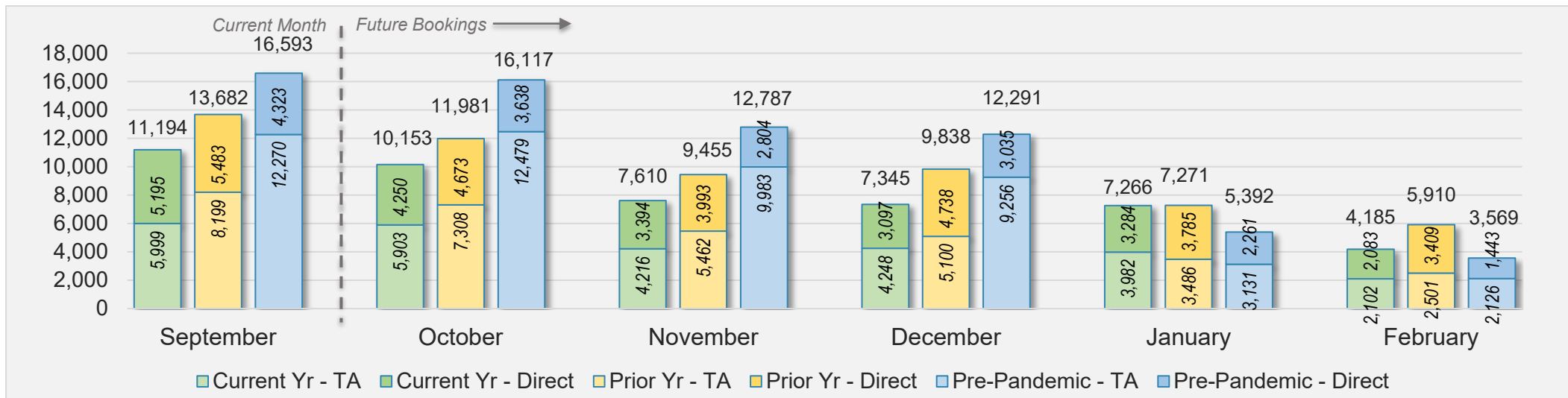
O'ahu (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i



Source: ForwardKeys as of 9/29/24

September 2024 Direct and Travel Agency Bookings to Hawai'i

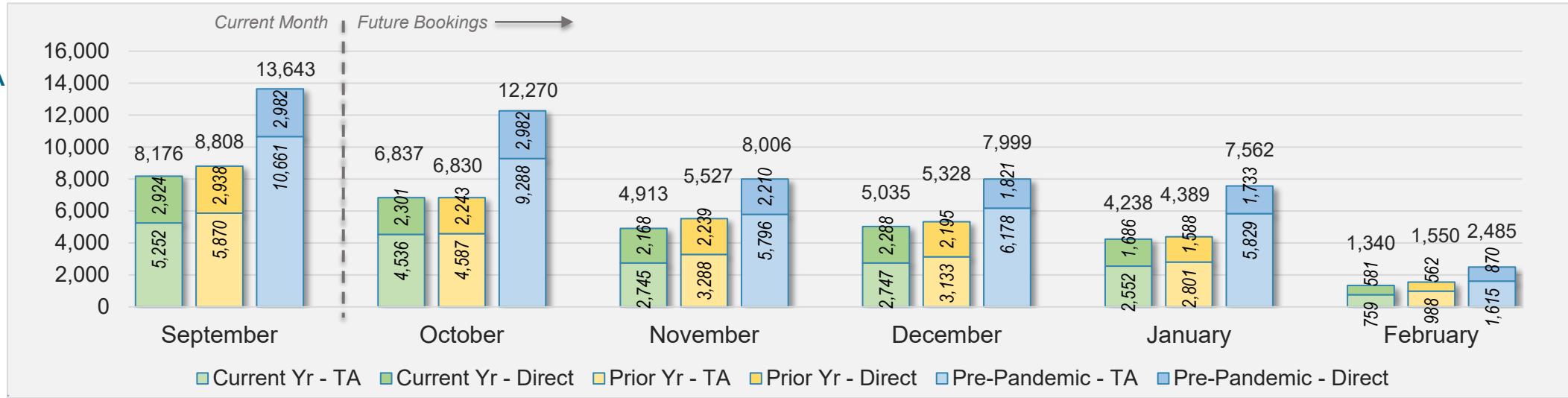


Source: ForwardKeys as of 9/29/24

O'ahu (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i

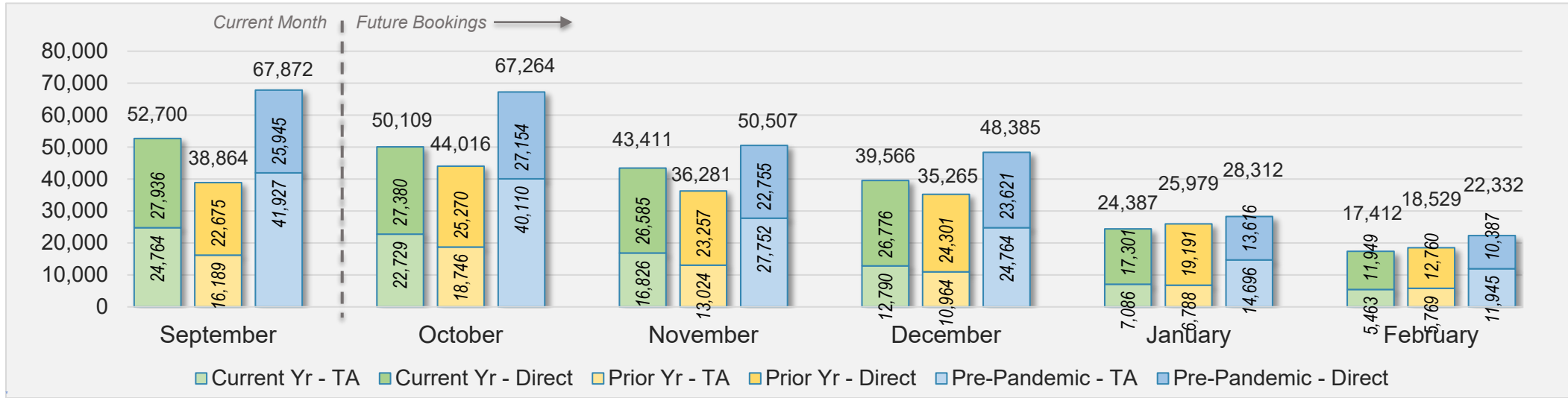
AUSTRALIA



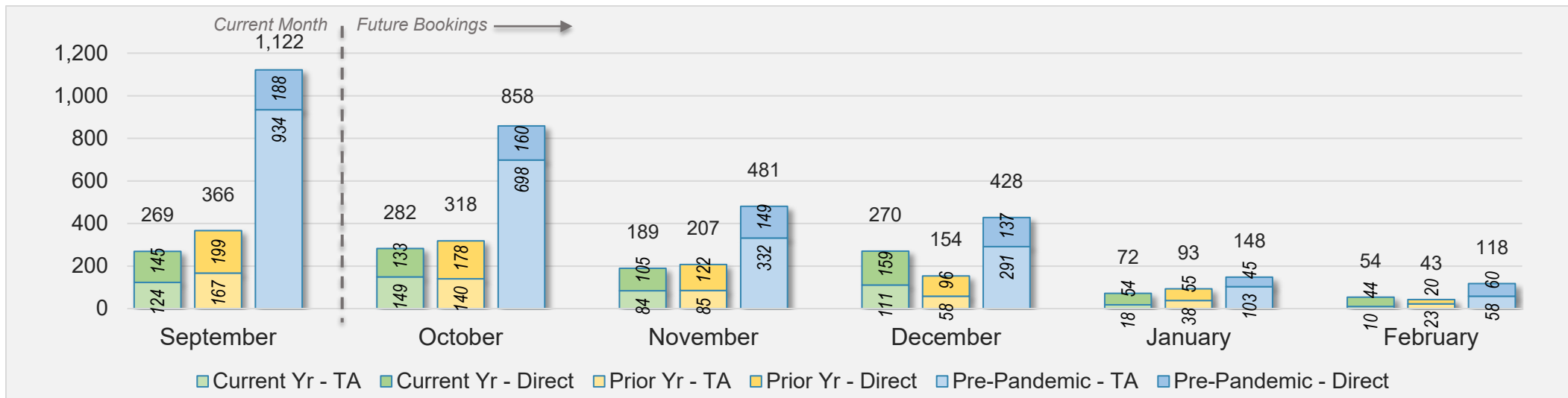
Source: ForwardKeys as of 9/29/24

Maui

September 2024 Direct and Travel Agency Bookings to Hawai'i

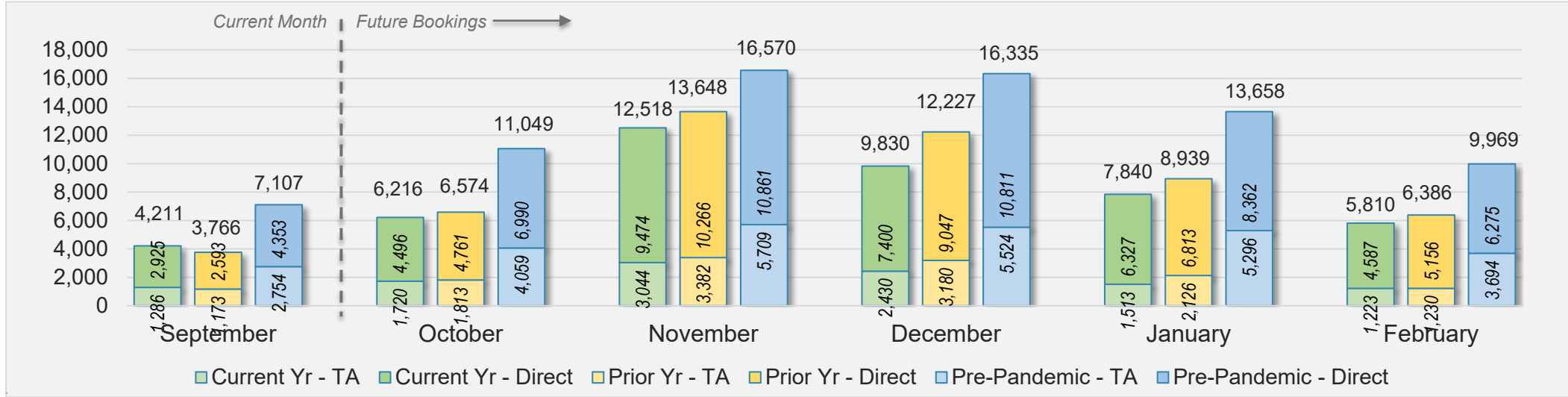


September 2024 Direct and Travel Agency Bookings to Hawai'i

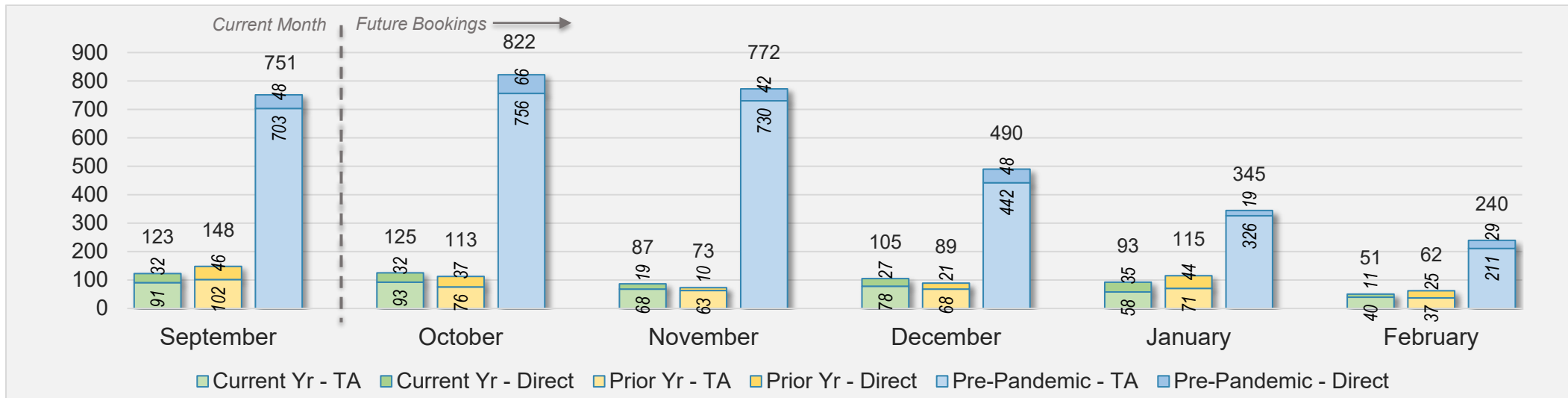


Maui (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i



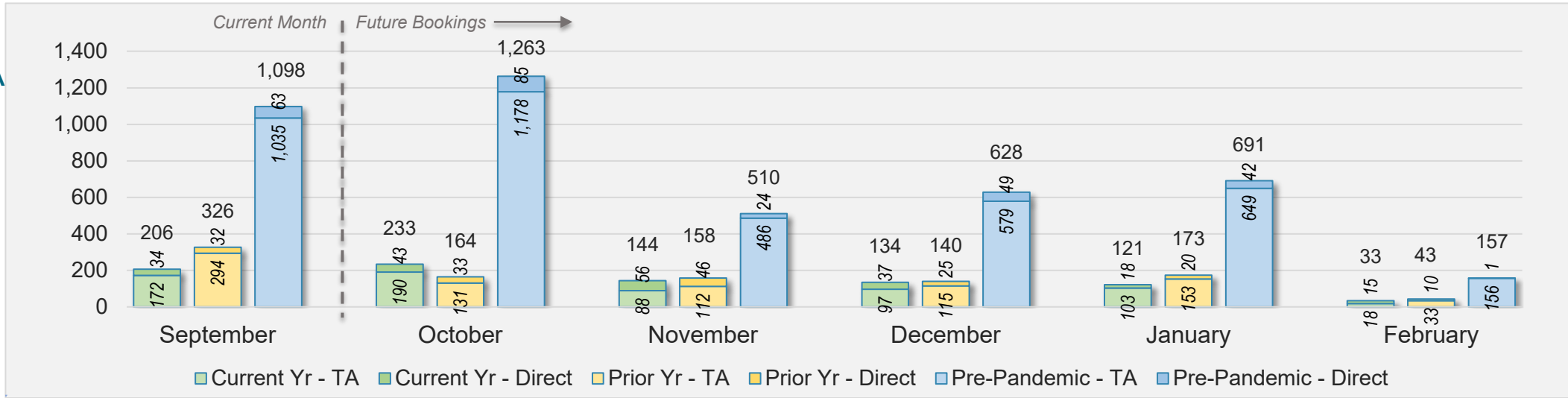
September 2024 Direct and Travel Agency Bookings to Hawai'i



Maui (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i

AUSTRALIA

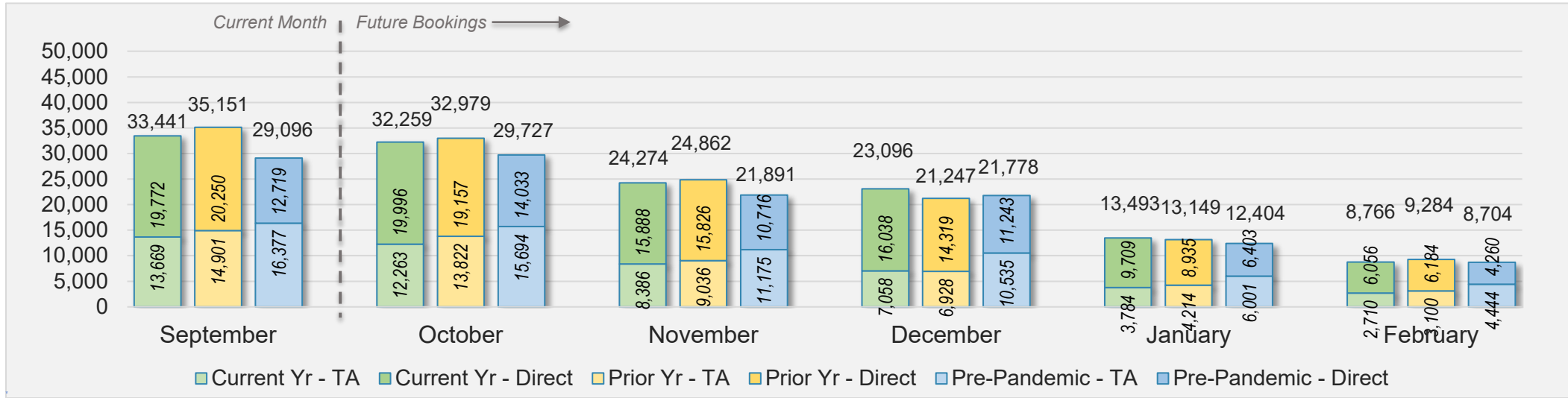


Source: ForwardKeys as of 9/29/24

Kaua'i

September 2024 Direct and Travel Agency Bookings to Hawai'i

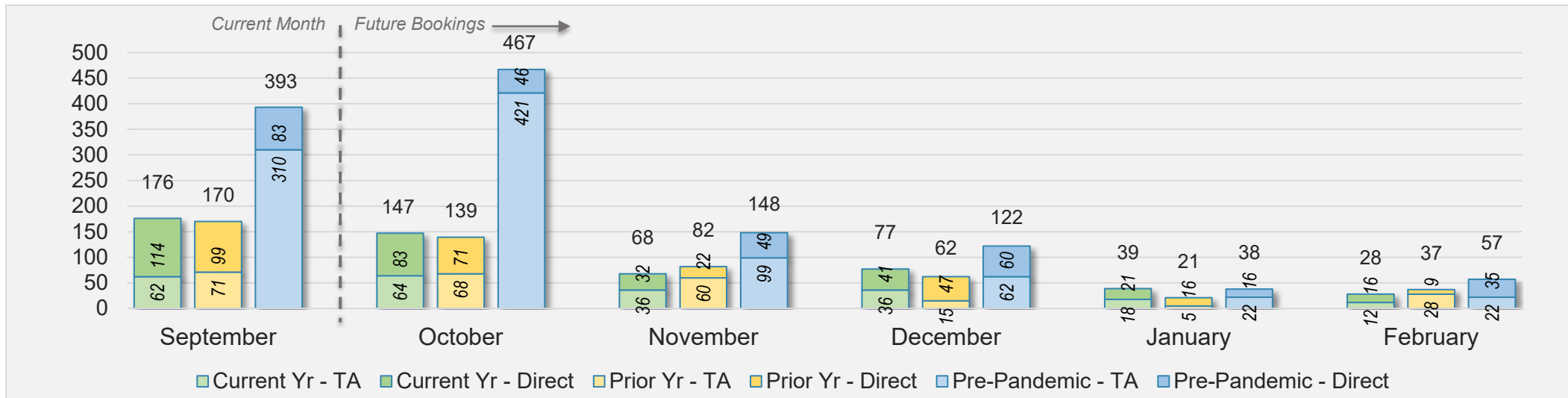
U.S.



Source: ForwardKeys as of 9/29/24

September 2024 Direct and Travel Agency Bookings to Hawai'i

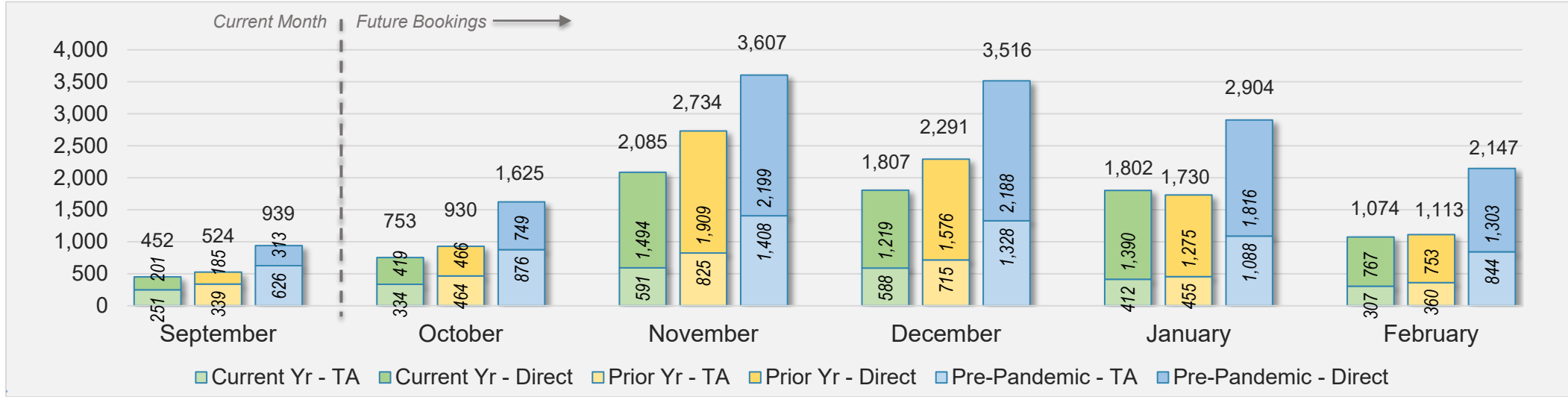
JAPAN



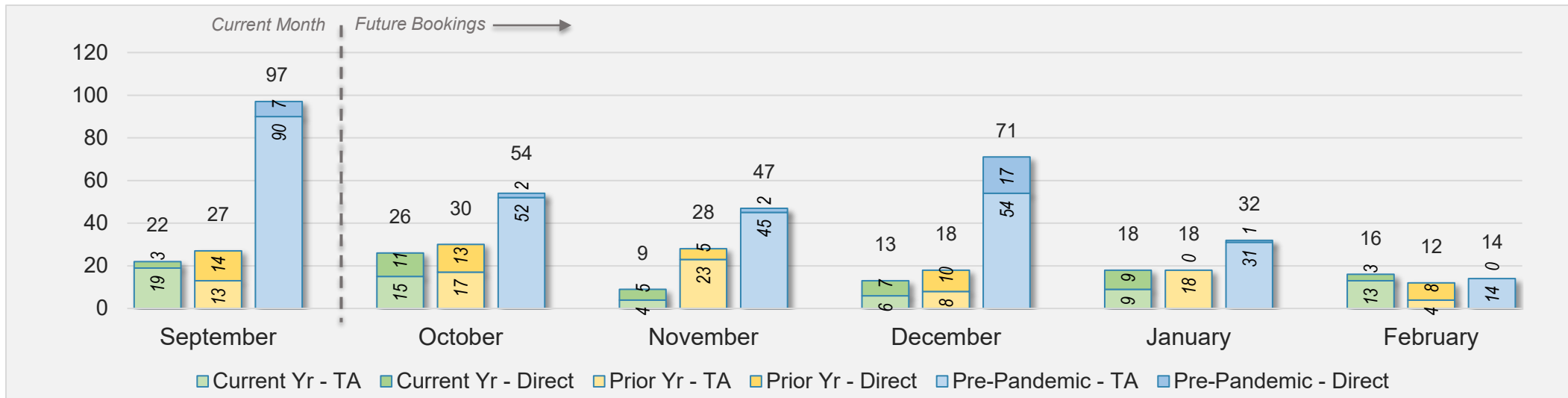
Source: ForwardKeys as of 9/29/24

Kaua'i (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i



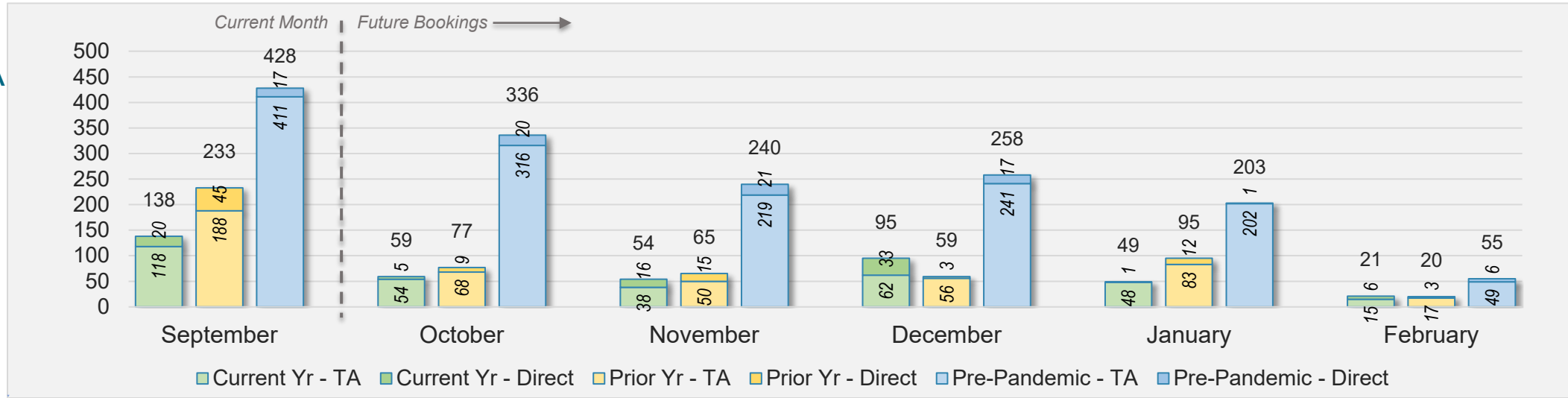
September 2024 Direct and Travel Agency Bookings to Hawai'i



Kaua'i (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i

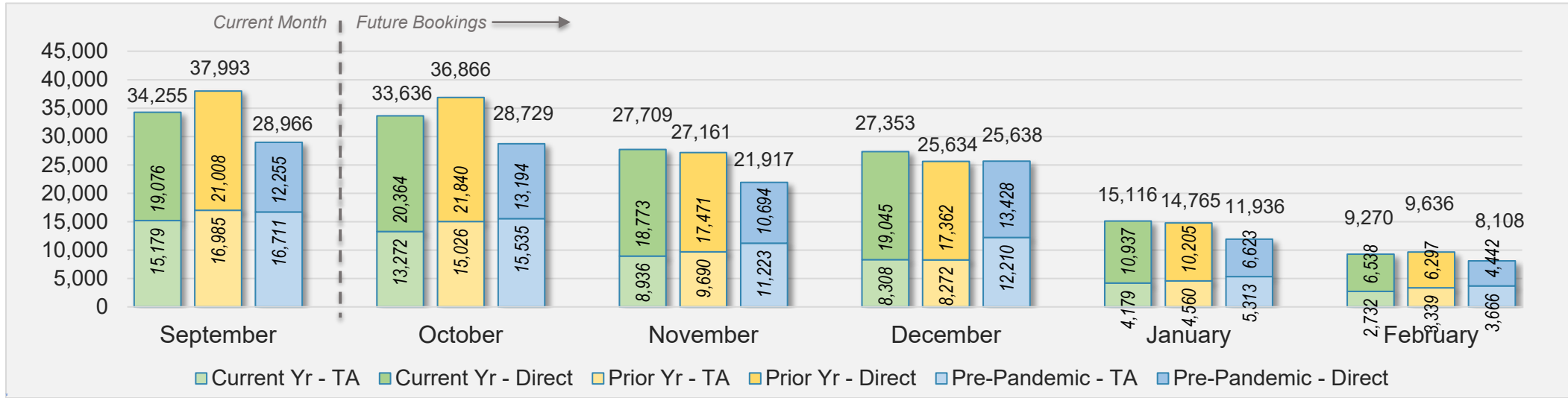
AUSTRALIA



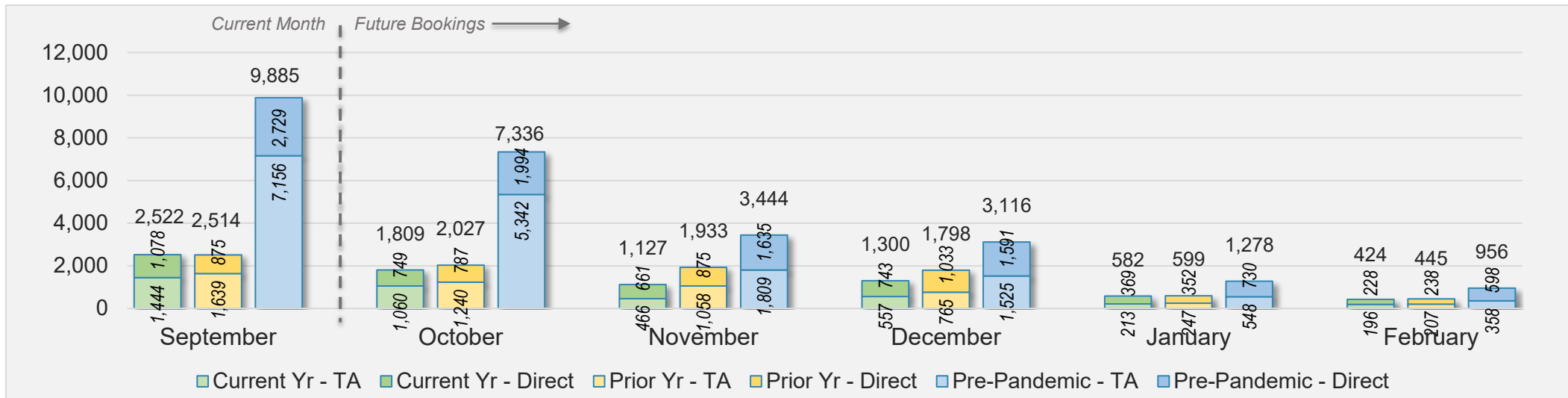
Source: ForwardKeys as of 9/29/24

Hawai'i Island

September 2024 Direct and Travel Agency Bookings to Hawai'i



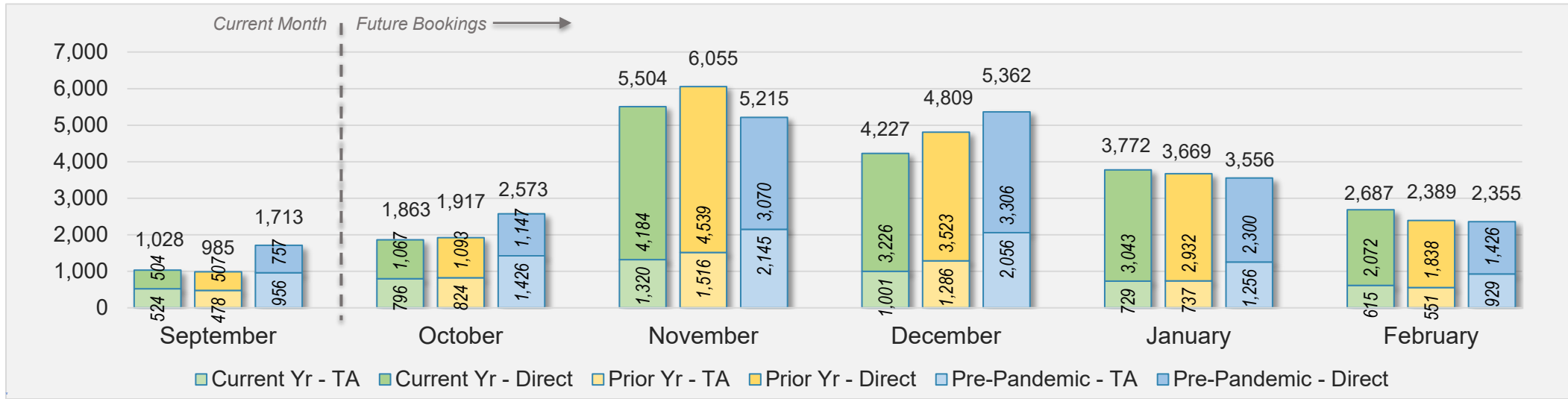
September 2024 Direct and Travel Agency Bookings to Hawai'i



Hawai'i Island (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i

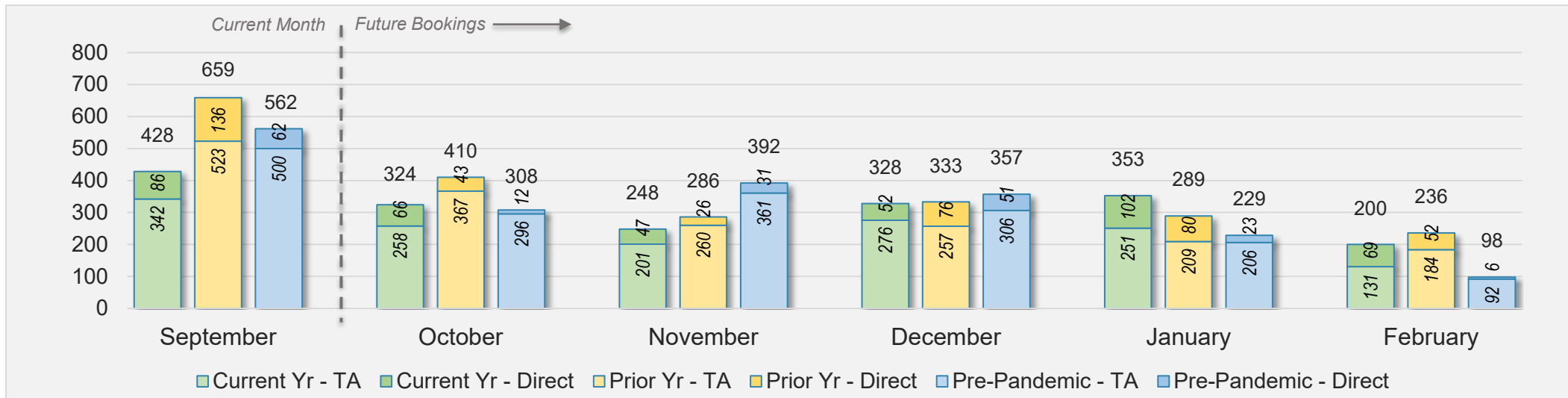
CANADA



Source: ForwardKeys as of 9/29/24

September 2024 Direct and Travel Agency Bookings to Hawai'i

KOREA

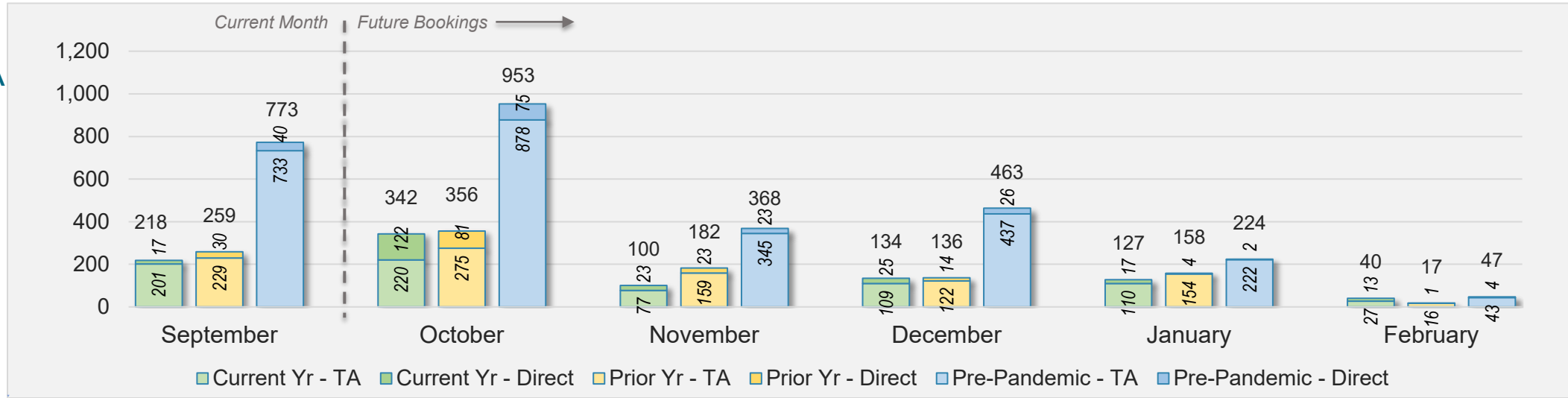


Source: ForwardKeys as of 9/29/24

Hawai'i Island (continued)

September 2024 Direct and Travel Agency Bookings to Hawai'i

AUSTRALIA



Source: ForwardKeys as of 9/29/24