



Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii-tourismauthority.org

David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

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Hawai'i Hotel RevPAR Down 13.5% in September 2021 Compared to September 2019 Due to Lower Occupancy; Hawai'i Still Leading the Nation in RevPAR and ADR

HONOLULU – Hawai'i hotels statewide reported substantially higher revenue per available room (RevPAR), average daily rate (ADR), and occupancy in September 2021 compared to September 2020 when the State's quarantine order for travelers due to the COVID-19 pandemic resulted in dramatic declines for the hotel industry. When compared to September 2019, statewide ADR was higher in September 2021 but RevPAR was lower due to less occupancy.

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in September 2021 was \$168 (+442.6%), with ADR at \$304 (+102.7%) and occupancy of 55.2 percent (+34.6 percentage points) compared to September 2020 (Figure 1). Compared with September 2019, RevPAR was 13.5 percent lower, driven by lower occupancy (-23.8 percentage points) which could not be offset by increased ADR (+23.7%) (Figure 5).

"Hawai'i's hotel industry saw a decrease in September RevPAR and occupancy statewide compared to September 2019, in part due to the effects of the Delta variant that stymied travel demand," said John De Fries, HTA president and CEO. "This reminds us that the pandemic is not over and we must remain vigilant to keep our communities safe and economic recovery on track."

The report's findings utilized data compiled by STR, Inc., which conducts the largest and most comprehensive survey of hotel properties in the Hawaiian Islands. For September, the survey included 144 properties representing 46,094 rooms, or 85.4 percent of all lodging properties¹ and 86.0 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including those offering full service, limited service, and condominium hotels. Vacation rental and timeshare properties were not included in this survey.

In September 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to the Delta variant resulting in the state's health care system being overburdened.

Hawai'i hotel room revenues statewide rose to \$270.0 million (+908.7% vs. 2020, -13.2% vs. 2019) in September. Room demand was 887,100 room nights (+397.6% vs. 2020, -29.8% vs. 2019) and room supply was 1.6 million room nights (+85.9% vs. 2020, +0.4% vs. 2019) (Figure 2). Many properties closed or reduced operations starting in April 2020 due to the COVID-19 pandemic. Due to these supply reductions, comparative data for certain markets and prices classes were not available for 2020; and comparisons to 2019 have been added.

¹ Based on 2019 census rooms.

Luxury Class properties earned RevPAR of \$308 (+1,364.2% vs. 2020, -4.7% vs. 2019), with ADR at \$664 (+149.9% vs. 2020, +45.6% vs. 2019) and occupancy of 46.4 percent (+38.5 percentage points vs. 2020, -24.4 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$159 (+273.1% vs. 2020, +23.7% vs. 2019) with ADR at \$281 (+147.3% vs. 2020, +77.0% vs. 2019) and occupancy of 56.4 percent (+19.0 percentage points vs. 2020, -24.3 percentage points vs. 2019).

Maui County hotels led the counties in September and achieved RevPAR that surpassed September 2019. RevPAR was \$289 (+958.5% vs. 2020, +25.2% vs. 2019), with ADR at \$488 (+233.1% vs. 2020, +54.4% vs. 2019) and occupancy of 59.2 percent (+40.6 percentage points vs. 2020, -13.8 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$366 (-3.5% vs. 2019²), with ADR at \$682 (+48.1% vs. 2019²) and occupancy of 53.7 percent (-28.7 percentage points vs. 2019²). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$258 (+1,828.6% vs. 2020, +30.0% vs. 2019), ADR at \$416 (+208.1% vs. 2020, +50.6% vs. 2019) and occupancy of 62.0 percent (+52.1 percentage points vs. 2020, -9.8 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$209 (+812.3% vs. 2020, +26.2% vs. 2019), with ADR at \$316 (+107.9% vs. 2020, +32.8% vs. 2019) and occupancy of 66.1 percent (+51.1 percentage points vs. 2020, -3.4 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$172 (+530.0% vs. 2020, +12.8% vs. 2019), with ADR at \$307 (+137.6% vs. 2020, +38.7% vs. 2019), and occupancy of 56.0 percent (+34.9 percentage points vs. 2020, -12.9 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$246 (+19.5% vs. 2019²), with ADR at \$476 (+54.1% vs. 2019²), and occupancy of 51.6 percent (-15.0 percentage points vs. 2019²).

O'ahu hotels reported RevPAR of \$110 (+214.6% vs. 2020, -42.8% vs. 2019) in September, ADR at \$212 (+36.3% vs. 2020, -6.2% vs. 2019) and occupancy of 51.8 percent (+29.4 percentage points vs. 2020, -33.1 percentage points vs. 2019). Waikīkī hotels earned \$104 (+243.4% vs. 2020, -46.0% vs. 2019) in RevPAR with ADR at \$199 (+30.6% vs. 2020, -11.1% vs. 2019) and occupancy of 52.0 percent (+32.2 percentage points vs. 2020, -33.7 percentage points vs. 2019).

First Nine Months of 2021

Through the first nine months of 2021, Hawai'i hotel performance statewide continued to be impacted by the COVID-19 pandemic. Hawai'i hotels earned \$177 in RevPAR (+49.0% vs. 2020, -22.3% vs. 2019), with ADR at \$317 (+16.5% vs. 2020, +13.0% vs. 2019) and occupancy of 55.9 percent (+12.2 percentage points vs. 2020, -25.3 percentage points vs. 2019).

Total statewide hotel revenues for the first nine months of 2021 were \$2.5 billion (+110.8% vs. 2020, -25.5% vs. 2019). Room supply was 14.1 million room nights (+41.5% vs. 2020, -4.1% vs. 2019), and room demand was 7.9 million room nights (+81.1% vs. 2020, -34.0% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets during the first nine months of 2021, the Hawaiian Islands earned the highest RevPAR at \$177 (+49.0%). Miami, Florida was second at \$143 (+52.3%), followed by New York, New York at \$101 (+29.8%) (Figure 19).

² Comparative data for 2020 were not available.

The Hawaiian Islands also led the U.S. markets in ADR at \$317 (+16.5%), followed by Miami, Florida at \$216 (+8.1%) and New York, New York at \$182 (+16.6%) (Figure 20).

With the U.S. Mainland accessible for road trips and short-haul inter-continental flights, the Hawaiian Islands' occupancy continued to be lower than many destinations in STR's top 25 markets; landing at the 11th spot (Figure 21). Tampa, Florida topped the country in occupancy at 68.9 percent (+17.4 percentage points), followed by Miami, Florida at 66.1 percent (+19.2 percentage points), and Norfolk/Virginia Beach, Virginia at 63.6 percent (+13.7 percentage points).

Comparison to International Markets

Hotels in the Maldives ranked highest in RevPAR for international "sun and sea" destinations at \$337 (+46.2%), followed by French Polynesia (\$315, +29.9%) and Maui County (\$303, +81.9%). The island of Hawai'i, Kaua'i, and O'ahu ranked fourth, sixth, and ninth, respectively (Figure 22).

French Polynesia led in ADR at \$718 (+30.1%), followed by the Maldives (\$656, -11.7%) and Maui County (\$517, +26.1%). The island of Hawai'i, Kaua'i, and O'ahu ranked fifth, sixth, and ninth, respectively (Figure 23).

Puerto Rico led in occupancy for "sun and sea" destinations at 63.7 percent (+30.1 percentage points), followed by Maui County (58.7%, +18.0 percentage points) and Hawai'i Island (58.4 percent, +12.1 percentage points). Kaua'i and O'ahu ranked fifth and sixth, respectively (Figure 24).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaii tourism authority.org/research/infrastructure-research/>

About the Hawai'i Hotel Performance Report

The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i. The survey generally excludes properties with under 20 lodging units, such as small bed and breakfasts, youth hostels, single-family vacation rentals, cottages, individually rented vacation condominiums and sold timeshare units no longer available for hotel use. The data has been weighted both geographically and by class of property to compensate for any over and/or under representation of hotel survey participants by location and type.

For September, the survey included 144 properties¹ representing 46,094 rooms, or 85.4 percent of all lodging properties and 86.0 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The September survey included 75 properties on O'ahu representing 28,639 rooms (95.2% of operating properties); 39 properties in the County of Maui, representing 9,548 rooms (74.4% of operating properties); 15 properties on the island of Hawai'i, representing 4,760 rooms (71.4% of operating properties); and 15 properties on Kaua'i, representing 3,147 rooms (78.8% of operating properties).

About the Hawai'i Tourism Authority

The [Hawai'i Tourism Authority](https://www.hawaii tourism authority.org) is the State of Hawai'i agency responsible for strategically managing its support of the tourism industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure tourism's sustainability and the benefits it brings to residents and communities statewide.

For more information about HTA, please visit www.hawaii tourism authority.org. Follow updates from HTA (@HawaiiHTA) on [Facebook](#), [Instagram](#), [Twitter](#) and its new [YouTube Channel](#).

For more information, contact:

Kalani Ka'anā'anā
Chief Brand Officer
Hawai'i Tourism Authority
Kalani@gohta.net

Jennifer Chun
Director of Tourism Research
Hawai'i Tourism Authority
Jennifer@gohta.net

Figure 1: Hawai'i Hotel Performance September 2021

	Occupancy % Percentage Pt. Change			Average Daily Rate %			RevPAR %		
	2021	2020	Change	2021	2020	Change	2021	2020	Change
State of Hawai'i	55.2%	20.6%	34.6%	\$304.32	\$150.12	102.7%	\$167.92	\$30.95	442.6%
Luxury Class	46.4%	7.9%	38.5%	\$663.73	\$265.55	149.9%	\$308.06	\$21.04	1364.2%
Upper Upscale Class	55.1%	16.3%	38.8%	\$282.78	\$168.44	67.9%	\$155.91	\$27.44	468.2%
Upscale Class	61.2%	16.3%	44.9%	\$228.57	\$166.72	37.1%	\$139.93	\$27.19	414.6%
Upper Midscale Class	53.6%	28.6%	25.0%	\$172.36	\$138.47	24.5%	\$92.41	\$39.57	133.5%
Midscale & Economy Class	56.4%	37.4%	19.0%	\$281.42	\$113.81	147.3%	\$158.82	\$42.57	273.1%
O'ahu	51.8%	22.4%	29.4%	\$212.16	\$155.65	36.3%	\$109.93	\$34.94	214.6%
Waikiki	52.0%	19.8%	32.2%	\$199.29	\$152.57	30.6%	\$103.70	\$30.20	243.4%
Other O'ahu	50.6%	35.2%	15.4%	\$287.08	\$163.96	75.1%	\$145.17	\$57.71	151.6%
O'ahu Luxury	36.7%	NA	NA	\$540.79	NA	NA	\$198.61	NA	NA
O'ahu Upper Upscale	51.3%	16.1%	35.2%	\$226.35	\$176.54	28.2%	\$116.10	\$28.44	308.2%
O'ahu Upscale	59.9%	23.5%	36.4%	\$182.81	\$173.32	5.5%	\$109.44	\$40.75	168.6%
O'ahu Upper Midscale	53.0%	28.4%	24.6%	\$151.94	\$137.49	10.5%	\$80.57	\$39.05	106.3%
O'ahu Midscale & Economy	46.7%	35.4%	11.2%	\$116.13	\$121.50	-4.4%	\$54.18	\$43.03	25.9%
Maui County	59.2%	18.6%	40.6%	\$487.93	\$146.48	233.1%	\$289.09	\$27.31	958.5%
Wailea	53.7%	NA	NA	\$682.02	NA	NA	\$366.42	NA	NA
Lahaina/Kā'anapali/Kapalua	62.0%	9.9%	52.1%	\$415.67	\$134.92	208.1%	\$257.86	\$13.37	1828.6%
Other Maui County	56.0%	29.5%	26.5%	\$581.54	\$151.32	284.3%	\$325.61	\$44.70	628.4%
Maui County Luxury	47.2%	NA	NA	\$778.20	NA	NA	\$367.65	NA	NA
Maui County Upper Upscale & Upscale	64.3%	10.3%	53.9%	\$377.65	\$168.81	123.7%	\$242.71	\$17.47	1289.3%
Island of Hawai'i	56.0%	21.1%	34.9%	\$306.86	\$129.14	137.6%	\$171.74	\$27.26	530.0%
Kohala Coast	51.6%	NA	NA	\$476.26	NA	NA	\$245.97	NA	NA
Kaua'i	66.1%	15.1%	51.1%	\$316.49	\$152.24	107.9%	\$209.29	\$22.94	812.3%

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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 2: Hawai'i Hotel Performance by Measure September 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	1,607.7	864.7	85.9%	887.1	178.3	397.6%	270.0	26.8	908.7%
O'ahu	902.9	465.5	94.0%	467.8	104.5	347.7%	99.3	16.3	510.3%
Waikiki	767.3	385.2	99.2%	399.2	76.2	423.7%	79.6	11.6	584.1%
Maui County	384.9	201.5	91.0%	228.0	37.6	507.1%	111.3	5.5	1922.4%
Wailea	87.0	NA	NA	46.7	NA	NA	31.9	NA	NA
Lahaina/Kā'anapali/ Kapalua	207.5	111.9	85.4%	128.7	11.1	1060.5%	53.5	1.5	3475.5%
Island of Hawai'i	200.0	106.4	88.0%	112.0	22.5	398.4%	34.4	2.9	1084.2%
Kohala Coast	83.9	NA	NA	43.3	NA	NA	20.6	NA	NA
Kaua'i	119.9	91.3	31.2%	79.3	13.8	475.8%	25.1	2.1	1097.1%

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Figure 3: Hawai'i Hotel Performance Year-to-Date September 2021

	Occupancy % Percentage Pt. Change			Average Daily Rate %			RevPAR %		
	2021	2020	Change	2021	2020	Change	2021	2020	Change
State of Hawai'i	55.9%	43.7%	12.2%	\$316.88	\$272.10	16.5%	\$177.19	\$118.91	49.0%
Luxury Class	49.6%	48.2%	1.5%	\$756.21	\$608.46	24.3%	\$375.36	\$293.19	28.0%
Upper Upscale Class	54.3%	46.3%	8.0%	\$298.42	\$277.80	7.4%	\$162.08	\$128.60	26.0%
Upscale Class	60.1%	35.6%	24.6%	\$226.85	\$215.60	5.2%	\$136.45	\$76.74	77.8%
Upper Midscale Class	58.3%	45.7%	12.6%	\$166.82	\$165.74	0.6%	\$97.23	\$75.72	28.4%
Midscale & Economy Class	59.3%	49.8%	9.5%	\$238.47	\$164.96	44.6%	\$141.36	\$82.08	72.2%
O'ahu	54.3%	45.3%	8.9%	\$217.36	\$224.05	-3.0%	\$117.96	\$101.56	16.1%
Waikiki	53.8%	44.0%	9.8%	\$205.82	\$223.07	-7.7%	\$110.75	\$98.18	12.8%
Other O'ahu	57.2%	52.1%	5.1%	\$285.38	\$228.29	25.0%	\$163.12	\$118.90	37.2%
O'ahu Luxury	42.6%	NA	NA	\$584.79	NA	NA	\$249.03	NA	NA
O'ahu Upper Upscale	50.8%	45.5%	5.3%	\$236.64	\$250.17	-5.4%	\$120.15	\$113.81	5.6%
O'ahu Upscale	62.3%	42.4%	19.8%	\$185.29	\$194.77	-4.9%	\$115.34	\$82.62	39.6%
O'ahu Upper Midscale	57.0%	45.1%	11.9%	\$150.48	\$158.69	-5.2%	\$85.84	\$71.58	19.9%
O'ahu Midscale & Economy	58.9%	55.7%	3.2%	\$118.58	\$129.31	-8.3%	\$69.80	\$72.00	-3.1%
Maui County	58.7%	40.7%	18.0%	\$517.12	\$410.25	26.1%	\$303.46	\$166.79	81.9%
Wailea	54.7%	NA	NA	\$809.37	NA	NA	\$443.10	NA	NA
Lahaina/Kā'anapali/Kapalua	59.2%	35.8%	23.4%	\$436.37	\$370.40	17.8%	\$258.24	\$132.58	94.8%
Other Maui County	58.1%	46.7%	11.4%	\$613.74	\$448.05	37.0%	\$356.57	\$209.10	70.5%
Maui County Luxury	50.7%	NA	NA	\$893.94	NA	NA	\$452.99	NA	NA
Maui County Upper Upscale & Upscale	61.5%	36.6%	24.9%	\$395.24	\$349.73	13.0%	\$243.19	\$128.16	89.8%
Island of Hawai'i	58.4%	46.3%	12.1%	\$336.62	\$253.95	32.6%	\$196.58	\$117.61	67.1%
Kohala Coast	59.7%	NA	NA	\$517.71	NA	NA	\$308.83	NA	NA
Kaua'i	54.8%	38.1%	16.8%	\$308.20	\$273.75	12.6%	\$169.01	\$104.20	62.2%

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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date September 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	14,133.6	9,988.4	41.5%	7,903.1	4,365.0	81.1%	2,504.3	1,187.7	110.8%
O'ahu	7,857.8	5,526.7	42.2%	4,264.4	2,505.1	70.2%	926.9	561.3	65.1%
Waikiki	6,775.2	4,626.4	46.4%	3,645.6	2,036.2	79.0%	750.3	454.2	65.2%
Maui County	3,477.6	2,317.4	50.1%	2,040.7	942.1	116.6%	1,055.3	386.5	173.0%
Wailea	775.7	NA	NA	424.7	NA	NA	343.7	NA	NA
Lahaina/Kā'anapali/ Kapalua	1,878.4	1,281.4	46.6%	1,111.6	458.7	142.4%	485.1	169.9	185.5%
Island of Hawai'i	1,782.2	1,231.0	44.8%	1,040.8	570.1	82.6%	350.3	144.8	142.0%
Kohala Coast	763.0	NA	NA	455.1	NA	NA	235.6	NA	NA
Kaua'i	1,016.0	913.3	11.2%	557.2	347.7	60.3%	171.7	95.2	80.4%

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Figure 5: Hawai'i Hotel Performance September 2021 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	55.2%	78.9%	-23.8%	\$304.32	\$246.00	23.7%	\$167.92	\$194.20	-13.5%
Luxury Class	46.4%	70.9%	-24.4%	\$663.73	\$456.01	45.6%	\$308.06	\$323.13	-4.7%
Upper Upscale Class	55.1%	80.0%	-24.8%	\$282.78	\$251.66	12.4%	\$155.91	\$201.29	-22.5%
Upscale Class	61.2%	79.5%	-18.3%	\$228.57	\$191.96	19.1%	\$139.93	\$152.66	-8.3%
Upper Midscale Class	53.6%	83.3%	-29.7%	\$172.36	\$156.24	10.3%	\$92.41	\$130.15	-29.0%
Midscale & Economy Class	56.4%	80.8%	-24.3%	\$281.42	\$158.95	77.0%	\$158.82	\$128.40	23.7%
O'ahu	51.8%	84.9%	-33.1%	\$212.16	\$226.26	-6.2%	\$109.93	\$192.15	-42.8%
Waikiki	52.0%	85.7%	-33.7%	\$199.29	\$224.05	-11.1%	\$103.70	\$192.11	-46.0%
Other O'ahu	50.6%	80.0%	-29.4%	\$287.08	\$240.61	19.3%	\$145.17	\$192.39	-24.5%
O'ahu Luxury	36.7%	74.2%	-37.5%	\$540.79	\$450.07	20.2%	\$198.61	\$333.99	-40.5%
O'ahu Upper Upscale	51.3%	85.7%	-34.4%	\$226.35	\$246.01	-8.0%	\$116.10	\$210.91	-45.0%
O'ahu Upscale	59.9%	88.0%	-28.1%	\$182.81	\$192.64	-5.1%	\$109.44	\$169.53	-35.4%
O'ahu Upper Midscale	53.0%	83.9%	-30.8%	\$151.94	\$153.33	-0.9%	\$80.57	\$128.61	-37.4%
O'ahu Midscale & Economy	46.7%	88.5%	-41.9%	\$116.13	\$131.31	-11.6%	\$54.18	\$116.23	-53.4%
Maui County	59.2%	73.1%	-13.8%	\$487.93	\$316.01	54.4%	\$289.09	\$230.88	25.2%
Wailea	53.7%	82.4%	-28.7%	\$682.02	\$460.63	48.1%	\$366.42	\$379.64	-3.5%
Lahaina/Kā'anapali/Kapalua	62.0%	71.8%	-9.8%	\$415.67	\$276.04	50.6%	\$257.86	\$198.29	30.0%
Other Maui County	56.0%	74.6%	-18.6%	\$581.54	\$364.45	59.6%	\$325.61	\$271.90	19.8%
Maui County Luxury	47.2%	73.8%	-26.6%	\$778.20	\$483.79	60.9%	\$367.65	\$357.22	2.9%
Maui County Upper Upscale & Upscale	64.3%	73.2%	-8.9%	\$377.65	\$261.97	44.2%	\$242.71	\$191.64	26.6%
Island of Hawai'i	56.0%	68.8%	-12.9%	\$306.86	\$221.21	38.7%	\$171.74	\$152.25	12.8%
Kohala Coast	51.6%	66.6%	-15.0%	\$476.26	\$309.06	54.1%	\$245.97	\$205.89	19.5%
Kauai	66.1%	69.6%	-3.4%	\$316.49	\$238.41	32.8%	\$209.29	\$165.86	26.2%

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

Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 6: Hawai'i Hotel Performance by Measure September 2021 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	1,607.7	1,601.4	0.4%	887.1	1,264.2	-29.8%	270.0	311.0	-13.2%
O'ahu	902.9	902.1	0.1%	467.8	766.1	-38.9%	99.3	173.3	-42.7%
Waikiki	767.3	774.2	-0.9%	399.2	663.8	-39.9%	79.6	148.7	-46.5%
Maui County	384.9	373.3	3.1%	228.0	272.7	-16.4%	111.3	86.2	29.1%
Wailea	87.0	65.8	32.1%	46.7	54.2	-13.9%	31.9	25.0	27.5%
Lahaina/Kā'anapali/Kapalua	207.5	208.0	-0.3%	128.7	149.4	-13.9%	53.5	41.2	29.7%
Island of Hawai'i	200.0	191.2	4.6%	112.0	131.6	-14.9%	34.4	29.1	18.0%
Kohala Coast	83.9	88.2	-4.9%	43.3	58.8	-26.3%	20.6	18.2	13.6%
Kauai	119.9	134.8	-11.1%	79.3	93.8	-15.5%	25.1	22.4	12.2%

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Figure 7: Hawai'i Hotel Performance Year-to-Date September 2021 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	55.9%	81.3%	-25.3%	\$316.88	\$280.51	13.0%	\$177.19	\$227.96	-22.3%
Luxury Class	49.6%	77.0%	-27.4%	\$756.21	\$558.51	35.4%	\$375.36	\$430.19	-12.7%
Upper Upscale Class	54.3%	83.2%	-28.9%	\$298.42	\$280.22	6.5%	\$162.08	\$233.09	-30.5%
Upscale Class	60.1%	78.7%	-18.5%	\$226.85	\$209.10	8.5%	\$136.45	\$164.52	-17.1%
Upper Midscale Class	58.3%	84.3%	-26.0%	\$166.82	\$163.62	2.0%	\$97.23	\$137.93	-29.5%
Midscale & Economy Class	59.3%	82.5%	-23.2%	\$238.47	\$173.54	37.4%	\$141.36	\$143.18	-1.3%
O'ahu	54.3%	84.6%	-30.4%	\$217.36	\$238.47	-8.9%	\$117.96	\$201.83	-41.6%
Waikiki	53.8%	84.9%	-31.1%	\$205.82	\$233.38	-11.8%	\$110.75	\$198.14	-44.1%
Other O'ahu	57.2%	83.0%	-25.9%	\$285.38	\$270.05	5.7%	\$163.12	\$224.26	-27.3%
O'ahu Luxury	42.6%	74.2%	-31.6%	\$584.79	\$491.56	19.0%	\$249.03	\$364.53	-31.7%
O'ahu Upper Upscale	50.8%	86.0%	-35.2%	\$236.64	\$262.05	-9.7%	\$120.15	\$225.35	-46.7%
O'ahu Upscale	62.3%	85.2%	-23.0%	\$185.29	\$195.73	-5.3%	\$115.34	\$166.81	-30.9%
O'ahu Upper Midscale	57.0%	84.7%	-27.7%	\$150.48	\$157.86	-4.7%	\$85.84	\$133.74	-35.8%
O'ahu Midscale & Economy	58.9%	87.9%	-29.0%	\$118.58	\$133.34	-11.1%	\$69.80	\$117.21	-40.4%
Maui County	58.7%	78.3%	-19.6%	\$517.12	\$396.82	30.3%	\$303.46	\$310.83	-2.4%
Wailea	54.7%	89.2%	-34.5%	\$809.37	\$609.03	32.9%	\$443.10	\$543.50	-18.5%
Lahaina/Kā'anapali/Kapalua	59.2%	77.5%	-18.3%	\$436.37	\$334.07	30.6%	\$258.24	\$258.94	-0.3%
Other Maui County	58.1%	79.4%	-21.3%	\$613.74	\$475.11	29.2%	\$356.57	\$377.12	-5.4%
Maui County Luxury	50.7%	81.1%	-30.5%	\$893.94	\$645.42	38.5%	\$452.99	\$523.71	-13.5%
Maui County Upper Upscale & Upscale	61.5%	78.2%	-16.7%	\$395.24	\$315.58	25.2%	\$243.19	\$246.75	-1.4%
Island of Hawai'i	58.4%	77.2%	-18.8%	\$336.62	\$263.49	27.8%	\$196.58	\$203.53	-3.4%
Kohala Coast	59.7%	78.0%	-18.4%	\$517.71	\$374.16	38.4%	\$308.83	\$292.00	5.8%
Kaua'i	54.8%	72.7%	-17.8%	\$308.20	\$283.14	8.9%	\$169.01	\$205.75	-17.9%

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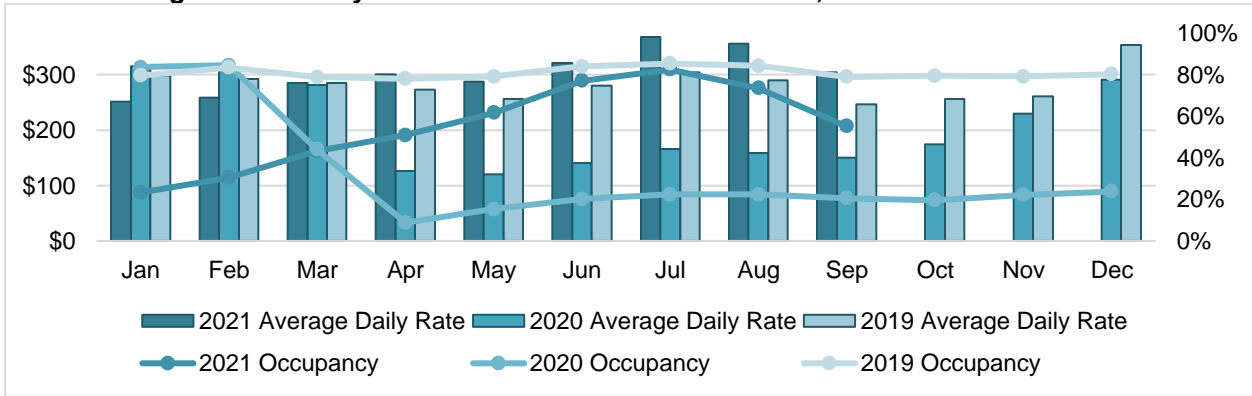
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date September 2021 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	14,133.6	14,741.0	-4.1%	7,903.1	11,979.5	-34.0%	2,504.3	3,360.4	-25.5%
O'ahu	7,857.8	8,277.7	-5.1%	4,264.4	7,006.1	-39.1%	926.9	1,670.7	-44.5%
Waikiki	6,775.2	7,107.0	-4.7%	3,645.6	6,033.9	-39.6%	750.3	1,408.2	-46.7%
Maui County	3,477.6	3,461.8	0.5%	2,040.7	2,711.6	-24.7%	1,055.3	1,076.0	-1.9%
Wailea	775.7	599.0	29.5%	424.7	534.5	-20.5%	343.7	325.5	5.6%
Lahaina/Kā'anapali/Kapalua	1,878.4	1,941.8	-3.3%	1,111.6	1,505.1	-26.1%	485.1	502.8	-3.5%
Island of Hawai'i	1,782.2	1,764.1	1.0%	1,040.8	1,362.7	-23.6%	350.3	359.1	-2.4%
Kohala Coast	763.0	817.2	-6.6%	455.1	637.7	-28.6%	235.6	238.6	-1.3%
Kaua'i	1,016.0	1,237.4	-17.9%	557.2	899.2	-38.0%	171.7	254.6	-32.5%

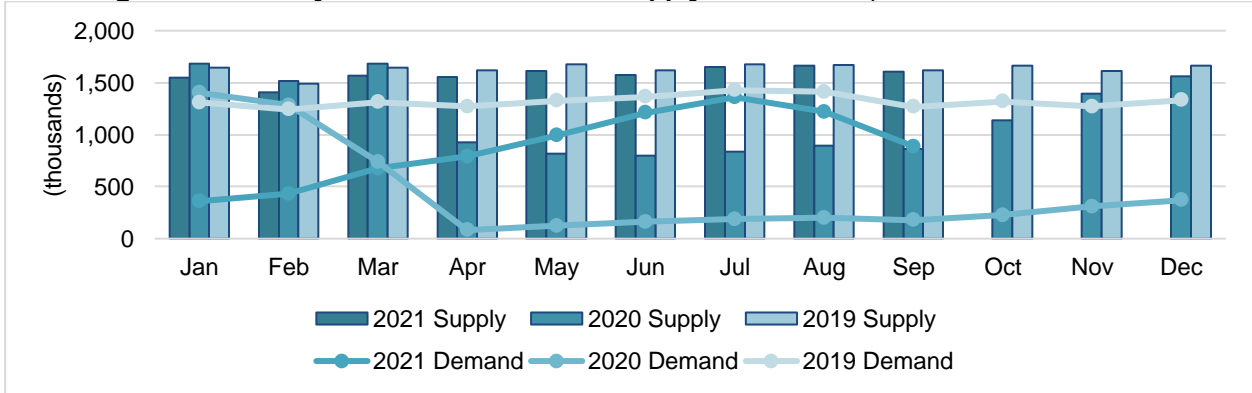
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



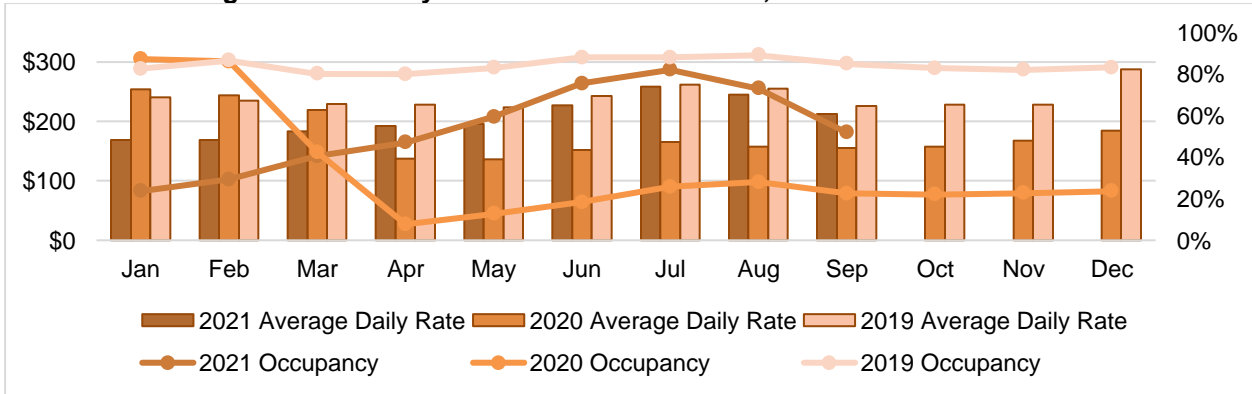
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



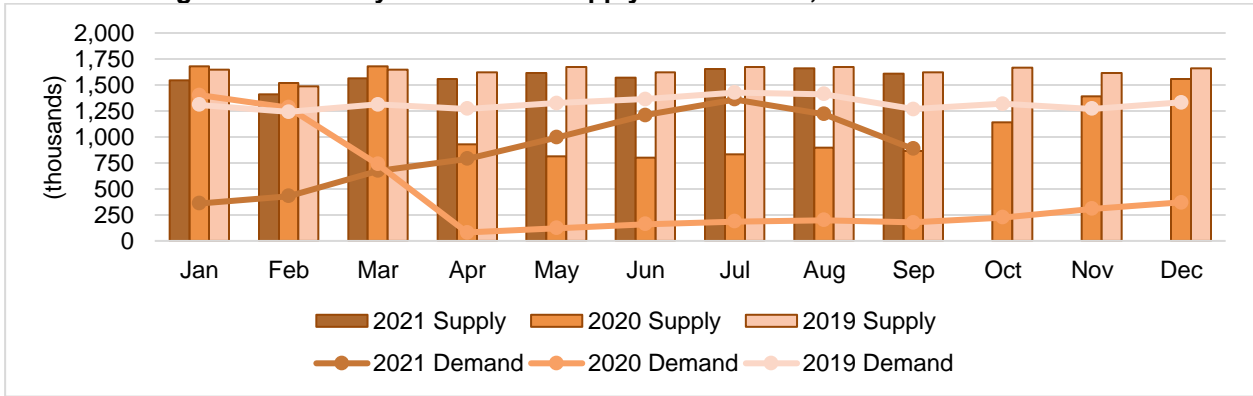
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

Figure 11: Monthly O'ahu Hotel Performance, 2021 vs. 2020 vs. 2019



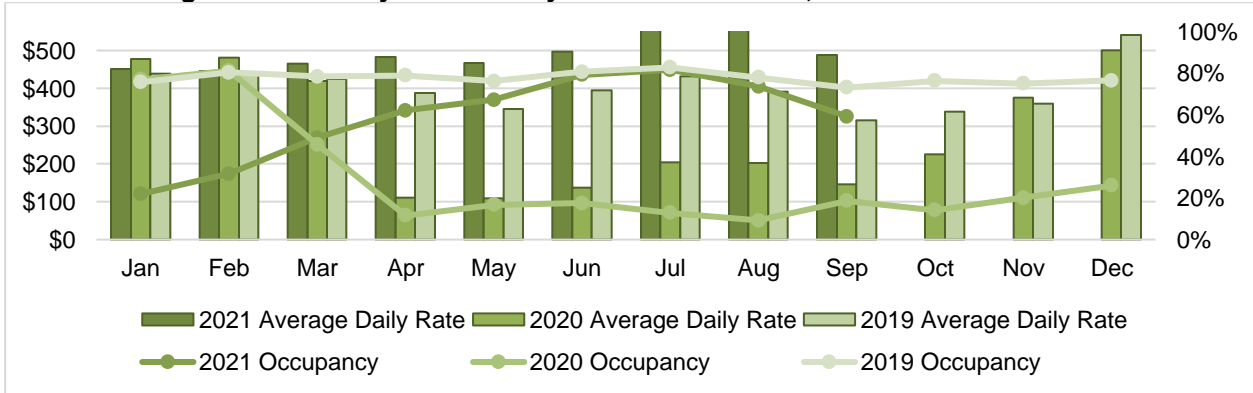
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



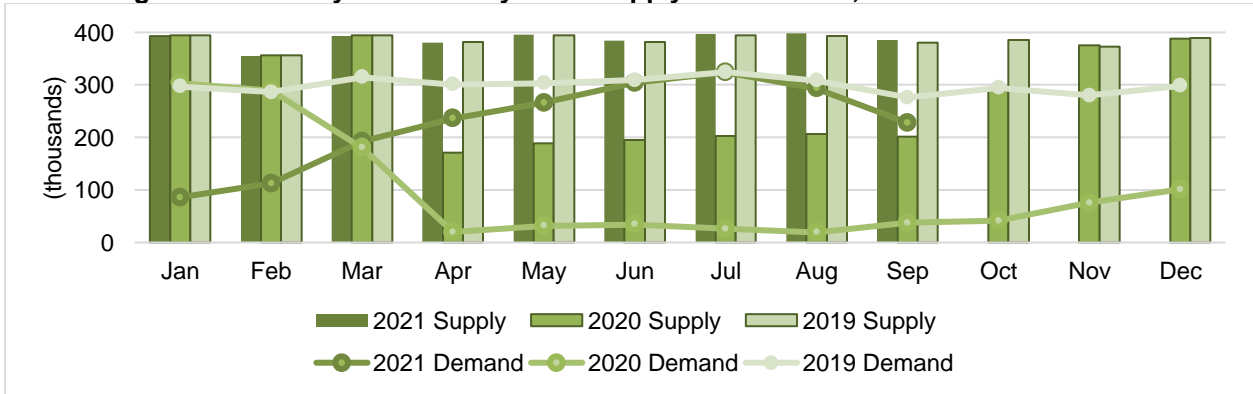
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Figure 13: Monthly Maui County Hotel Performance, 2021 vs. 2020 vs. 2019



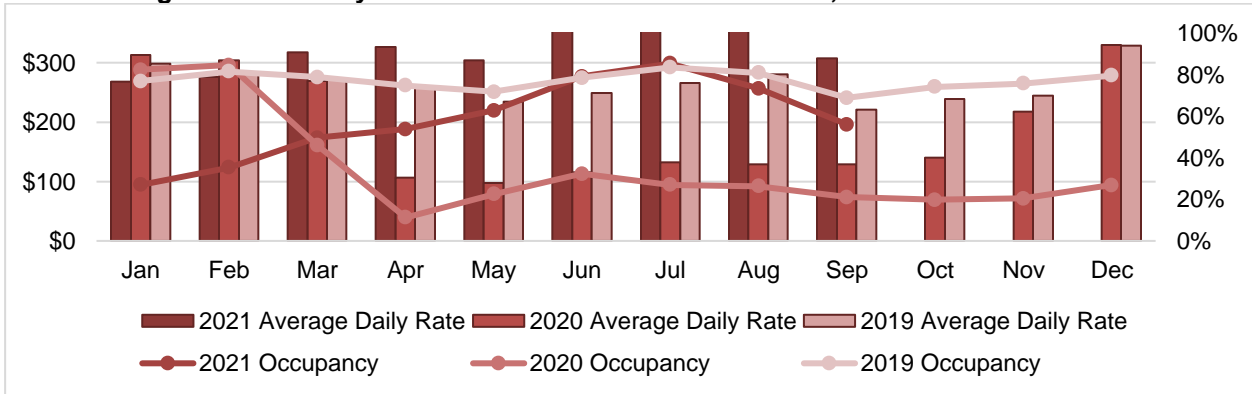
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



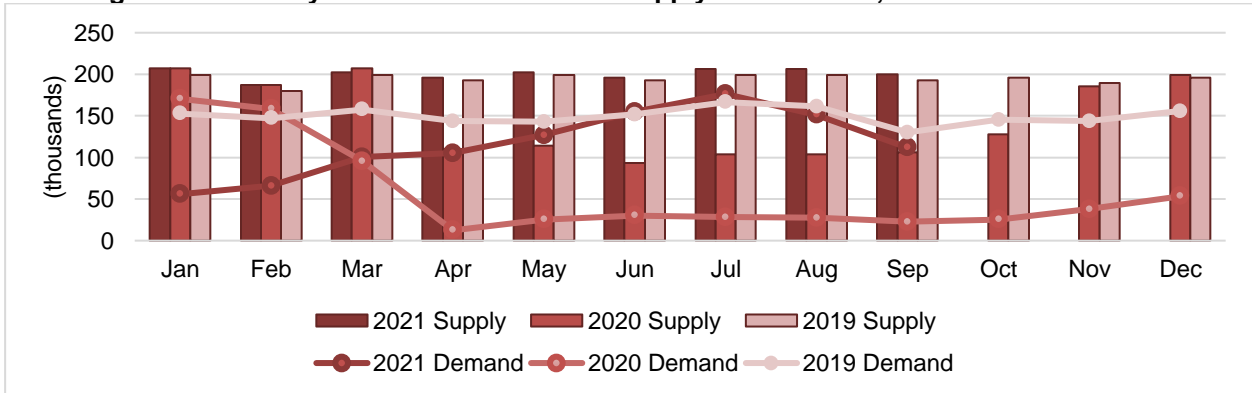
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



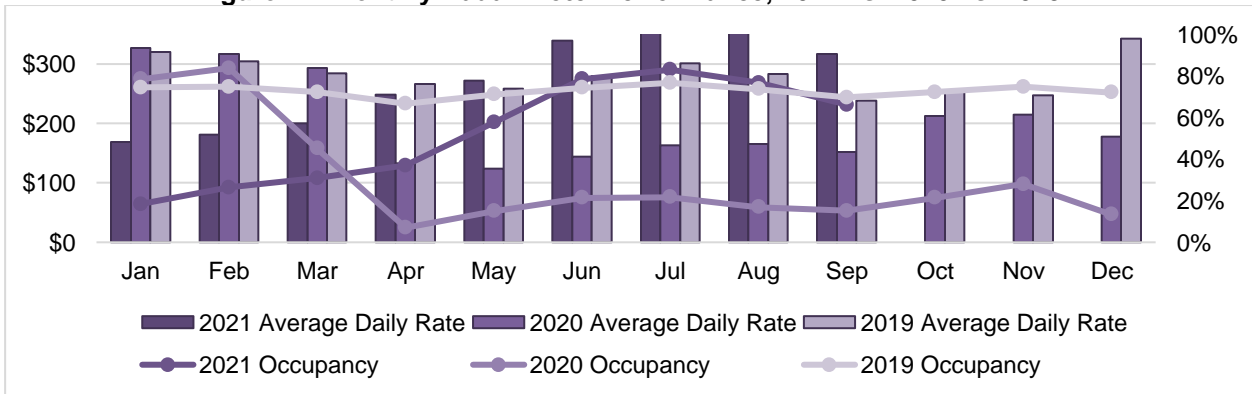
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



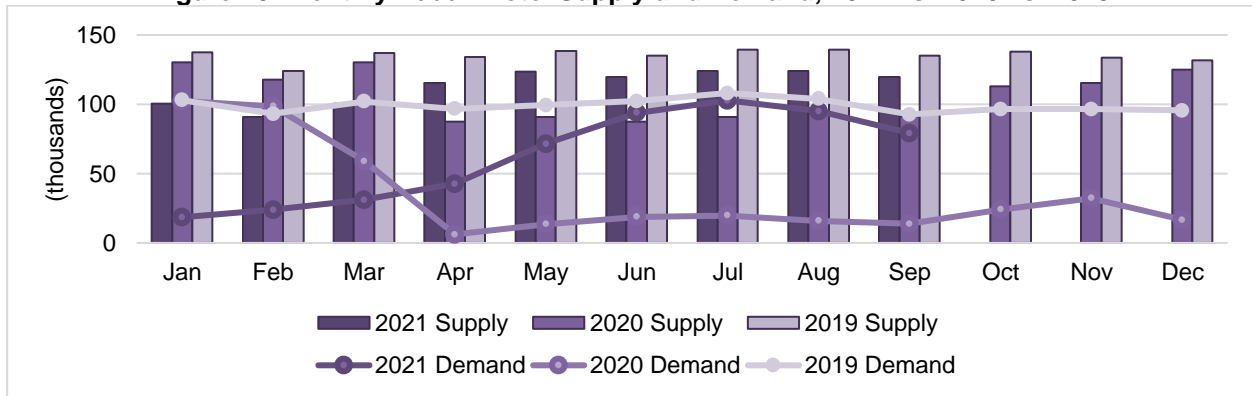
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Figure 17: Monthly Kaua'i Hotel Performance, 2021 vs. 2020 vs. 2019



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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



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Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD September 2021

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$177.19	49.0%
2	Miami, FL	\$142.62	52.3%
3	New York, NY	\$100.94	29.8%
4	San Diego, CA	\$100.56	46.1%
5	Los Angeles, CA	\$97.19	34.0%

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Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD September 2021

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$316.88	16.5%
2	Miami, FL	\$215.78	8.1%
3	New York, NY	\$181.92	16.6%
4	San Diego, CA	\$164.42	22.6%
5	Orange County, CA	\$161.86	14.7%

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Figure 21: Top 5 U.S. Markets – Occupancy – YTD September 2021

Rank	Destination	Occupancy	Percentage Pt. Change
1	Tampa, FL	68.9%	17.4%
2	Miami, FL	66.1%	19.2%
3	Norfolk/Virginia Beach, VA	63.6%	13.7%
4	Los Angeles, CA	62.3%	11.2%
5	Phoenix, AZ	61.2%	10.6%
11	Hawaiian Islands	55.9%	12.2%

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Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD September 2021

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$336.92	46.2%
2	French Polynesia	\$314.65	29.9%
3	Maui County	\$303.46	81.9%
4	Hawai'i Island	\$196.58	67.1%
5	Cabo San Lucas+	\$185.50	104.3%
6	Kaua'i	\$169.01	62.2%
7	Puerto Rico	\$155.34	125.5%
8	Aruba	\$147.33	-2.2%
9	O'ahu	\$117.96	16.2%
10	Cancun+	\$111.73	80.0%
11	Costa Rica	\$66.76	14.7%
12	Puerto Vallarta+	\$54.63	74.9%
13	Fiji	\$14.14	-53.8%
14	Phuket	\$9.64	-78.1%
15	Bali	\$7.74	-60.9%

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Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD September 2021

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$717.86	30.1%
2	Maldives	\$656.30	-11.7%
3	Maui County	\$517.12	26.1%
4	Cabo San Lucas+	\$397.32	28.7%
5	Hawai'i Island	\$336.62	32.6%
6	Kaua'i	\$308.20	12.6%
7	Aruba	\$294.70	-27.5%
8	Puerto Rico	\$243.96	19.0%
9	O'ahu	\$217.36	-3.0%
10	Cancun+	\$200.62	6.1%
11	Costa Rica	\$176.10	-5.8%
12	Puerto Vallarta+	\$103.96	18.1%
13	Phuket	\$80.12	-46.6%
14	Bali	\$61.85	-33.0%
15	Fiji	\$59.46	-45.7%

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Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD September 2021

Rank	Destination	Occupancy	Percentage Pt. Change
1	Puerto Rico	63.7%	30.1%
2	Maui County	58.7%	18.0%
3	Hawai'i Island	58.4%	12.1%
4	Cancun+	55.7%	22.9%
5	Kaua'i	54.8%	16.8%
6	O'ahu	54.3%	8.9%
7	Puerto Vallarta+	52.5%	17.0%
8	Maldives	51.3%	20.3%
9	Aruba	50.0%	12.9%
10	Cabo San Lucas+	46.7%	17.3%
11	French Polynesia	43.8%	-0.1%
12	Costa Rica	37.9%	6.8%
13	Fiji	23.8%	-4.1%
14	Bali	12.5%	-8.9%
15	Phuket	12.0%	-17.3%

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