



## December 2020 Hawai'i Hotel Performance Report

In December 2020, Hawai'i hotels statewide reported substantial declines in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to December 2019 as tourism continued to be impacted significantly by the COVID-19 pandemic.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority's (HTA) Research Division, statewide RevPAR decreased to \$69 (-75.6%), ADR fell to \$291 (-17.6%), and occupancy declined to 23.8 percent (-56.4 percentage points) (Figure 1) in December. 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.

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in the Hawaiian Islands. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's guidelines. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in December.

Last month Hawai'i hotel room revenues statewide fell by 77.2 percent to \$107.9 million, down from \$472.6 million in December 2019. Room demand was 72.3 percent lower than the same period a year ago. Room supply was only 6.6 percent lower year-over-year as properties continued to bring rooms back in service (Figure 2). Many properties that closed or reduced operations starting in April were reopened or partially reopened in December. If occupancy for December 2020 was calculated based on the room supply from December 2019, occupancy would be 22.2 percent for the month (Figure 3).

All classes of Hawai'i hotel properties statewide continued to report RevPAR losses in December compared to a year ago. Luxury Class properties earned RevPAR of \$168 (-71.1%), with ADR at \$865 (+8.9%) and occupancy of 19.5 percent (-54.0 percentage points). Midscale & Economy Class properties earned RevPAR of \$58 (-66.6%), with ADR at \$196 (-6.9%) and occupancy of 29.6 percent (-52.8 percentage points).

All of Hawai'i's four island counties reported lower RevPAR and occupancy. Maui County hotels led the state in RevPAR, earning \$130 (-68.5%), with ADR at \$501 (-7.4%) and occupancy of 26.0 percent (-50.5 percentage points). The luxury resort area of Wailea earned \$218 (-71.4%) in RevPAR, with ADR at \$834 (-6.3%) and occupancy of 26.1 percent (-59.3 percentage points).

O'ahu hotels earned RevPAR of \$43 (-81.8%) in December, with ADR at \$184 (-36.0%) and occupancy of 23.6 percent (-59.5 percentage points). Waikīkī hotels earned \$40 (-82.7%) in RevPAR with ADR at \$182 (-35.1%) and occupancy of 22.3 percent (-61.2 percentage points).

Hotels on the island of Hawai'i reported RevPAR of \$88 (-66.2%), with ADR at \$329 (+0.1%) and occupancy of 26.8 percent (-52.7 percentage points). Kohala Coast hotels earned \$146 in December RevPAR (-62.6%), with ADR at \$542 (+10.2%) and occupancy of 26.8 percent (-52.2 percentage points).

Kaua'i hotels earned RevPAR of \$24 (-90.3%) in December, with ADR at \$178 (-47.9%) and occupancy of 13.4 percent (-58.7 percentage points).

### Year-to-Date December 2020

Hawai'i hotel performance in 2020 was dramatically impacted by the COVID-19 pandemic. Of note, 2019 was a banner year for Hawai'i's hotel industry and 2020 began with that continued momentum. However, year-to-date, Hawai'i hotels earned \$99 in RevPAR (-56.6%), which is less than half of the \$229 RevPAR reported in 2019. ADR decreased to \$267 (-5.5%) and occupancy declined to 37.1 percent (-43.7 percentage points).

Total statewide hotel revenues in 2020 were \$1.4 billion (-69.0%) compared to \$4.5 billion in 2019. Many properties closed or reduced their supply starting April 2020, and began reopening in the fall. This resulted in room supply for the year at 14.1 million room nights, down 28.5 percent from 2019. Room demand was 5.2 million room nights, down 67.2 percent year-over-year.

### Comparison to Top U.S. Markets

In comparison to the top U.S. markets during 2020, the Hawaiian Islands earned the highest RevPAR at \$99 followed by the Miami/Hialeah market at \$87 (-41.4%) and San Francisco/San Mateo at \$74 (-64.0%) (Figure 20). Hawai'i also led the U.S. markets in ADR at \$267 followed by Miami/Hialeah (\$188, -4.1%) and San Francisco/San Mateo (\$177, -29.2%) (Figure 21).

With the U.S. Mainland accessible for road trips and short-haul inter-continental flights, the Hawaiian Islands' 2020 occupancy paled in comparison to STR's top 25 markets; landing at the 21<sup>st</sup> spot (Figure 22). Tampa/St. Petersburg, Florida topped the country in 2020 occupancy at 50.8 percent (-21.3 percentage points), followed by Phoenix, Arizona (49.8%, -20.7 percentage points) and Norfolk/Virginia Beach, Virginia (49.1%, -14.4 percentage points).

### Comparison to International Markets

When compared to international "sun and sea" destinations, Hawai'i's counties were in the upper half of the group for RevPAR year-to-date. Hotels in the Maldives ranked highest in RevPAR at \$250 (-30.3%) followed by French Polynesia (\$245, -37.6%) and Maui County (\$140, -54.9%). The island of Hawai'i, Kaua'i, and O'ahu ranked sixth, seventh, and eighth, respectively (Figure 23).

The Maldives led in ADR at \$782 (+42.8%) in 2020, followed by French Polynesia (\$579, +2.3%) and Maui County (\$414, +3.3%). Kaua'i, the island of Hawai'i, and O'ahu ranked sixth, seventh, and eighth, respectively (Figure 24).

French Polynesia led in 2020 occupancy for sun and sea destinations (42.3%, -27.0 percentage points), followed by O'ahu (39.0%, -45.1 percentage points) and the Puerto Vallarta region (38.7%, -28.4 percentage points). The island of Hawai'i, Maui County, and Kaua'i ranked fourth, sixth, and ninth, respectively (Figure 25).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiitourismauthority.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 December, the survey included 143 properties representing 43,106 rooms, or 80.4 percent of all lodging properties and 85.7 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels.

**Figure 1: Hawai'i Hotel Performance December 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	23.8%	80.2%	-56.4%	\$291.01	\$353.00	-17.6%	\$69.21	\$283.22	-75.6%
Luxury Class	19.5%	73.4%	-54.0%	\$865.06	\$794.47	8.9%	\$168.44	\$583.37	-71.1%
Upper Upscale Class	19.9%	81.6%	-61.6%	\$263.44	\$334.21	-21.2%	\$52.54	\$272.70	-80.7%
Upscale Class	28.8%	81.4%	-52.7%	\$193.47	\$239.93	-19.4%	\$55.63	\$195.39	-71.5%
Upper Midscale Class	28.9%	80.6%	-51.7%	\$149.28	\$202.83	-26.4%	\$43.17	\$163.51	-73.6%
Midscale & Economy Class	29.6%	82.4%	-52.8%	\$195.64	\$210.05	-6.9%	\$57.82	\$173.04	-66.6%
<b>O'ahu</b>	23.6%	83.1%	-59.5%	\$184.02	\$287.38	-36.0%	\$43.40	\$238.71	-81.8%
Waikiki	22.3%	83.5%	-61.2%	\$181.80	\$279.92	-35.1%	\$40.47	\$233.74	-82.7%
Other O'ahu	33.0%	80.5%	-47.5%	\$194.71	\$332.73	-41.5%	\$64.33	\$267.84	-76.0%
O'ahu Luxury	14.1%	75.3%	-61.2%	\$522.19	\$651.17	-19.8%	\$73.62	\$490.15	-85.0%
O'ahu Upper Upscale	17.2%	83.0%	-65.8%	\$211.36	\$302.62	-30.2%	\$36.36	\$251.16	-85.5%
O'ahu Upscale	33.8%	87.8%	-54.0%	\$172.67	\$226.03	-23.6%	\$58.32	\$198.43	-70.6%
O'ahu Upper Midscale	27.0%	80.0%	-53.0%	\$135.98	\$194.98	-30.3%	\$36.77	\$155.97	-76.4%
O'ahu Midscale & Economy	37.8%	88.4%	-50.6%	\$101.80	\$161.20	-36.8%	\$38.45	\$142.51	-73.0%
<b>Maui County</b>	26.0%	76.5%	-50.5%	\$501.39	\$541.45	-7.4%	\$130.37	\$414.31	-68.5%
Wailea	26.1%	85.4%	-59.3%	\$833.90	\$889.53	-6.3%	\$217.63	\$759.78	-71.4%
Lahaina/Kā'anapali/Kapalua	21.9%	75.1%	-53.2%	\$416.28	\$424.66	-2.0%	\$91.25	\$319.04	-71.4%
Other Maui County	30.9%	78.2%	-47.3%	\$573.78	\$678.42	-15.4%	\$177.28	\$530.61	-66.6%
Maui County Luxury	24.2%	74.3%	-50.1%	\$1,014.58	\$983.19	3.2%	\$245.92	\$730.54	-66.3%
Maui County Upper Upscale & Upscale	25.3%	77.5%	-52.2%	\$324.98	\$388.27	-16.3%	\$82.28	\$301.07	-72.7%
<b>Island of Hawai'i</b>	26.8%	79.5%	-52.7%	\$329.37	\$329.07	0.1%	\$88.40	\$261.73	-66.2%
Kohala Coast	26.8%	79.1%	-52.2%	\$542.47	\$492.37	10.2%	\$145.61	\$389.38	-62.6%
<b>Kaua'i</b>	13.4%	72.1%	-58.7%	\$178.35	\$342.53	-47.9%	\$23.88	\$246.80	-90.3%

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

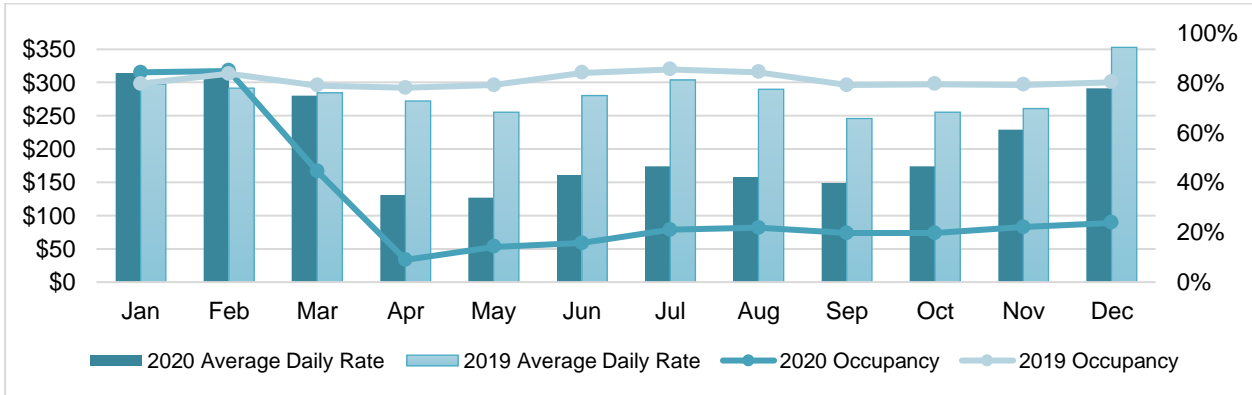
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

**Figure 2: Hawai'i Hotel Performance by Measure December 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	1,558.8	1,668.8	-6.6%	370.8	1,338.9	-72.3%	107.9	472.6	-77.2%
<b>O'ahu</b>	846.7	946.8	-10.6%	199.7	786.5	-74.6%	36.7	226.0	-83.7%
Waikiki	742.8	808.9	-8.2%	165.4	675.4	-75.5%	30.1	189.1	-84.1%
<b>Maui County</b>	387.6	391.0	-0.9%	100.8	299.2	-66.3%	50.5	162.0	-68.8%
Wailea	68.0	68.0	0.0%	17.8	58.1	-69.4%	14.8	51.7	-71.4%
Lahaina/Kā'anapali/Kapalua	211.3	214.9	-1.7%	46.3	161.5	-71.3%	19.3	68.6	-71.9%
<b>Island of Hawai'i</b>	199.4	197.9	0.8%	53.5	157.4	-66.0%	17.6	51.8	-66.0%
Kohala Coast	87.0	91.1	-4.5%	23.4	72.1	-67.6%	12.7	35.5	-64.3%
<b>Kaua'i</b>	125.1	133.1	-6.0%	16.8	95.9	-82.5%	3.0	32.9	-90.9%

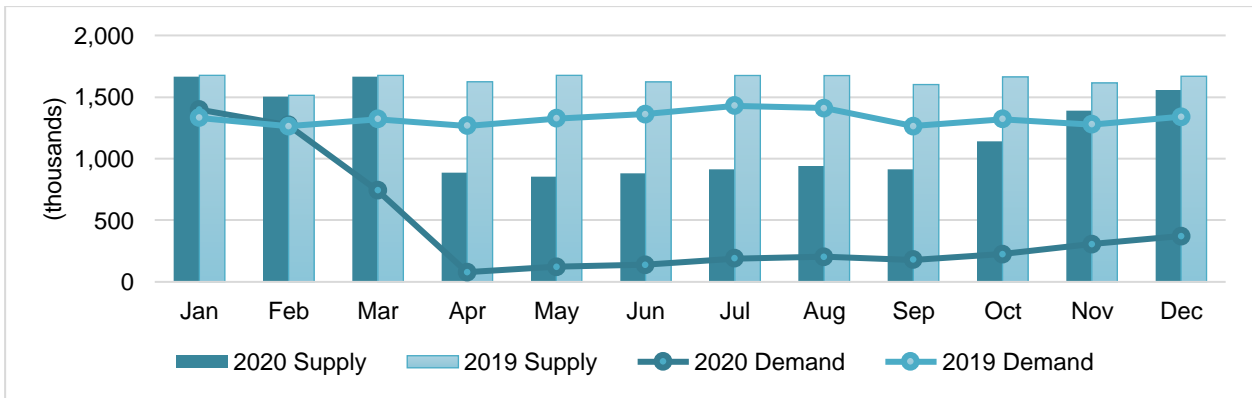
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority

**Figure 3: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019**



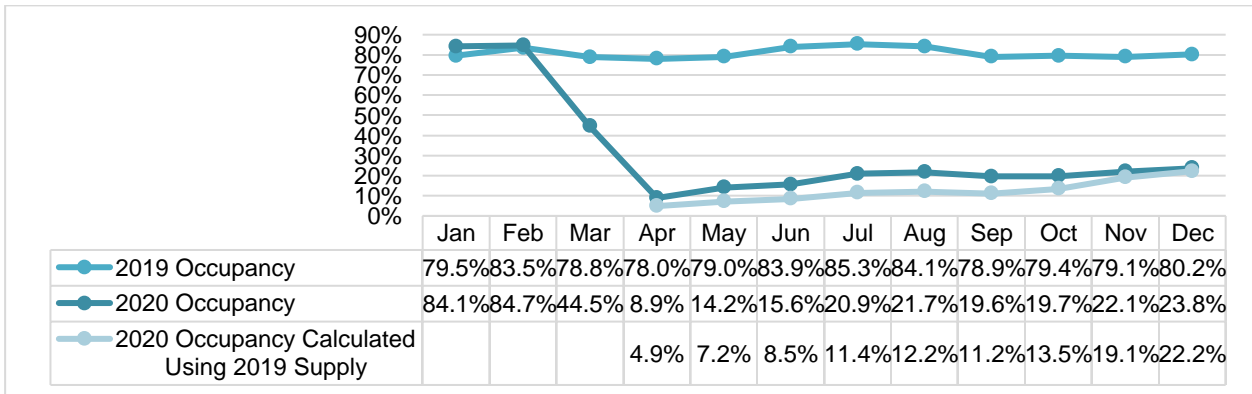
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 4: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



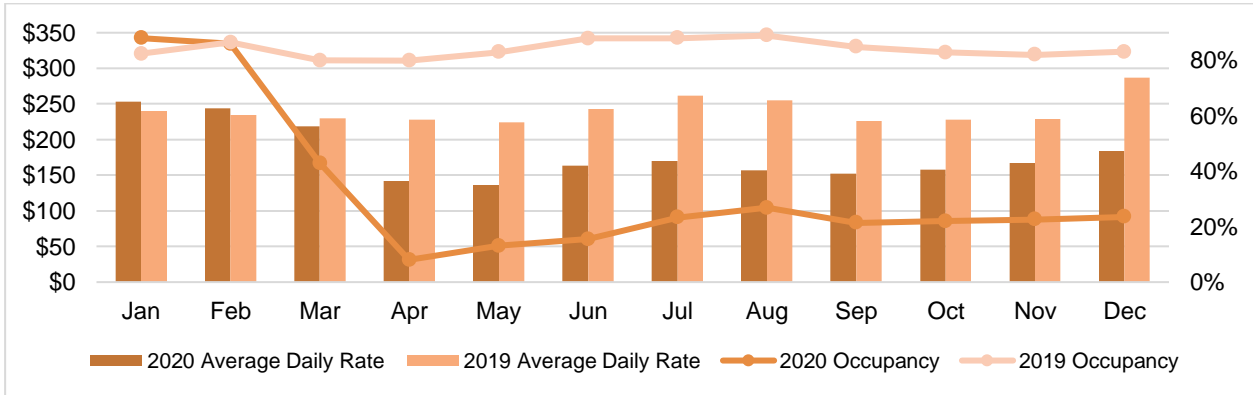
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 5: Monthly State of Hawai'i Hotel Occupancy, 2020 vs. 2019 and 2020 Calculated with 2019 Supply**



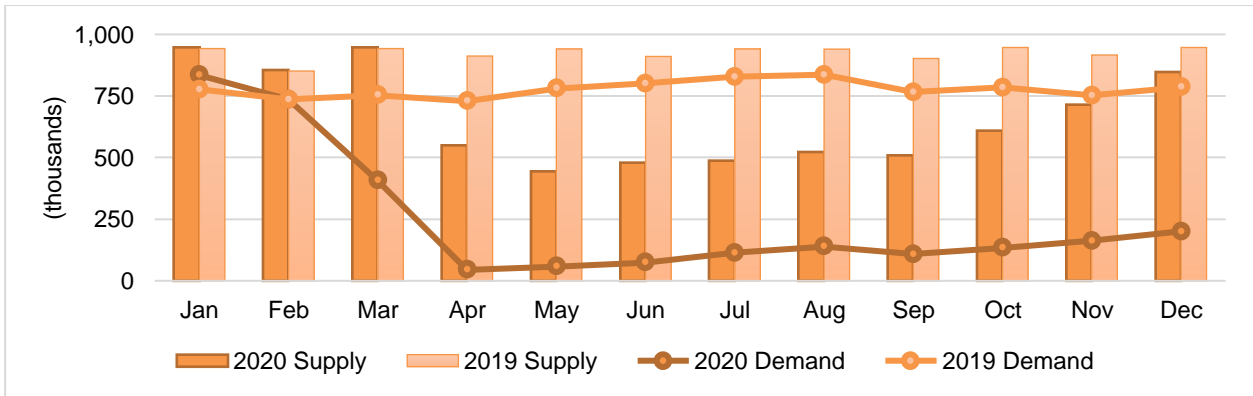
Source: STR, Inc. and Hawai'i Tourism Authority © Copyright 2021 Hawai'i Tourism Authority.

**Figure 6: Monthly O'ahu Hotel Performance, 2020 vs. 2019**



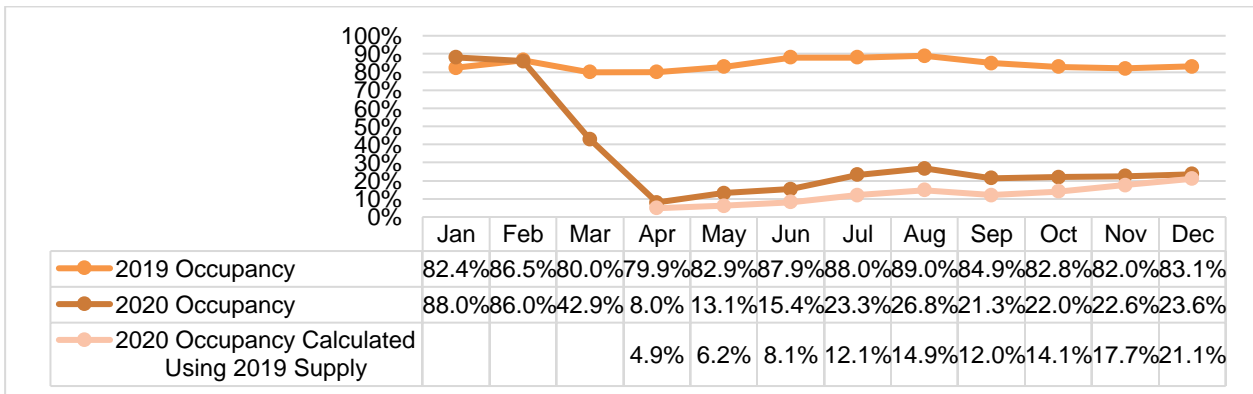
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 7: Monthly O'ahu Hotel Supply and Demand, 2020 vs. 2019**



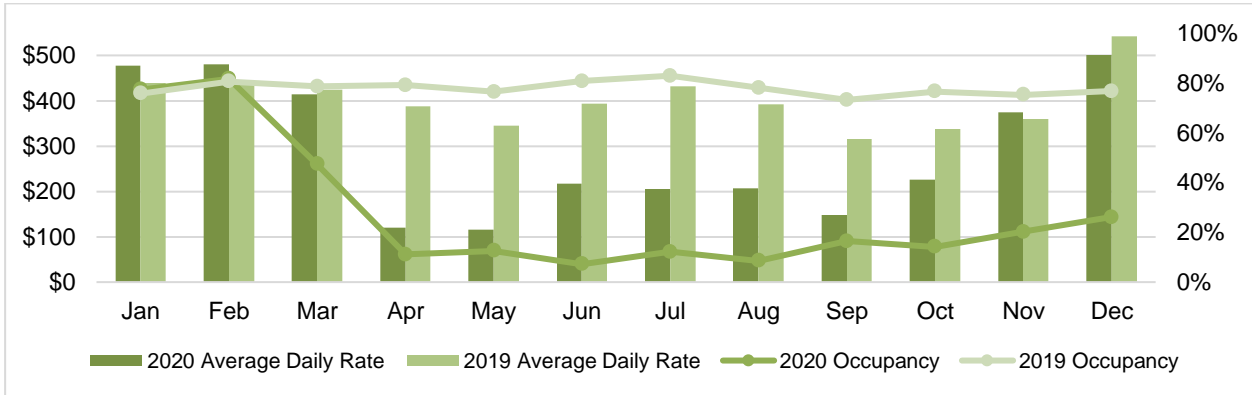
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 8: Monthly O'ahu Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



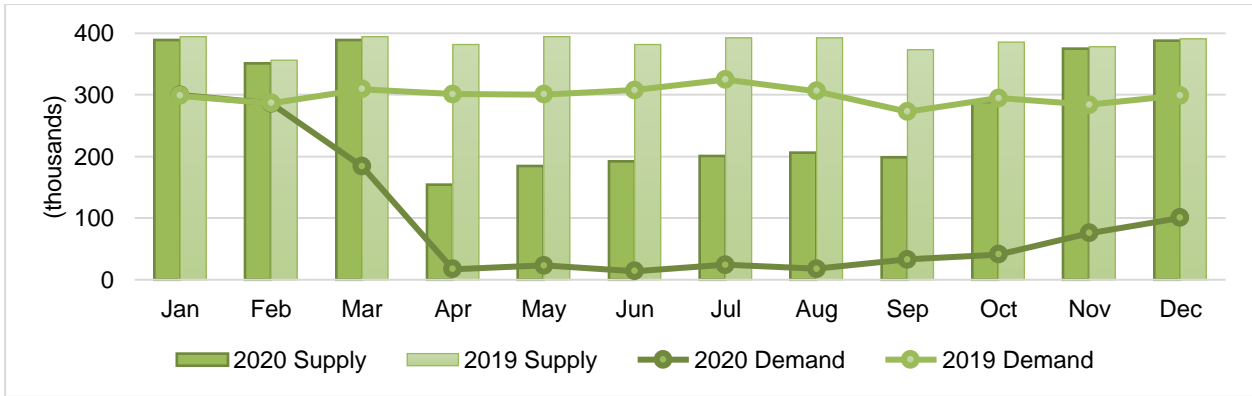
Source: STR, Inc. and Hawai'i Tourism Authority © Copyright 2021 Hawai'i Tourism Authority.

**Figure 9: Monthly Maui County Hotel Performance, 2020 vs. 2019**



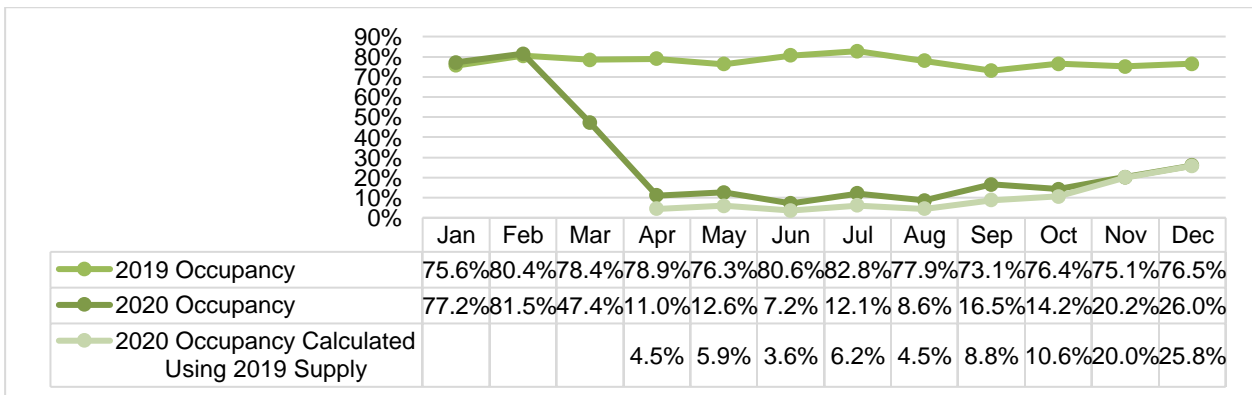
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 10: Monthly Maui County Hotel Supply and Demand, 2020 vs. 2019**



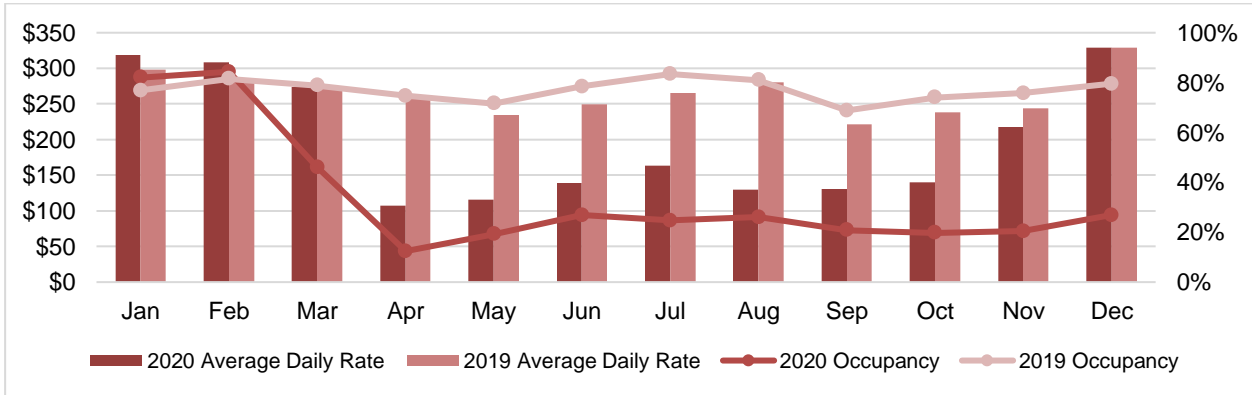
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 11: Monthly Maui County Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



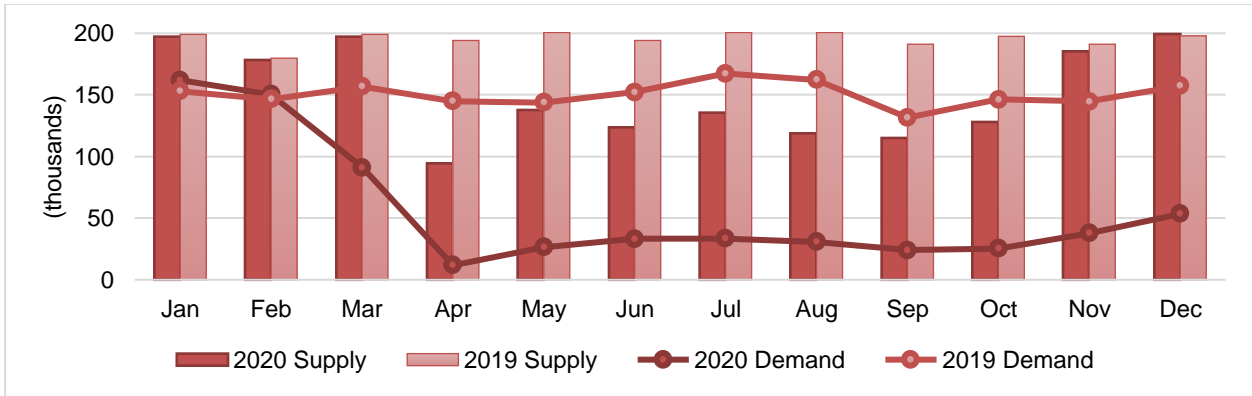
Source: STR, Inc. and Hawai'i Tourism Authority © Copyright 2021 Hawai'i Tourism Authority.

**Figure 12: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019**



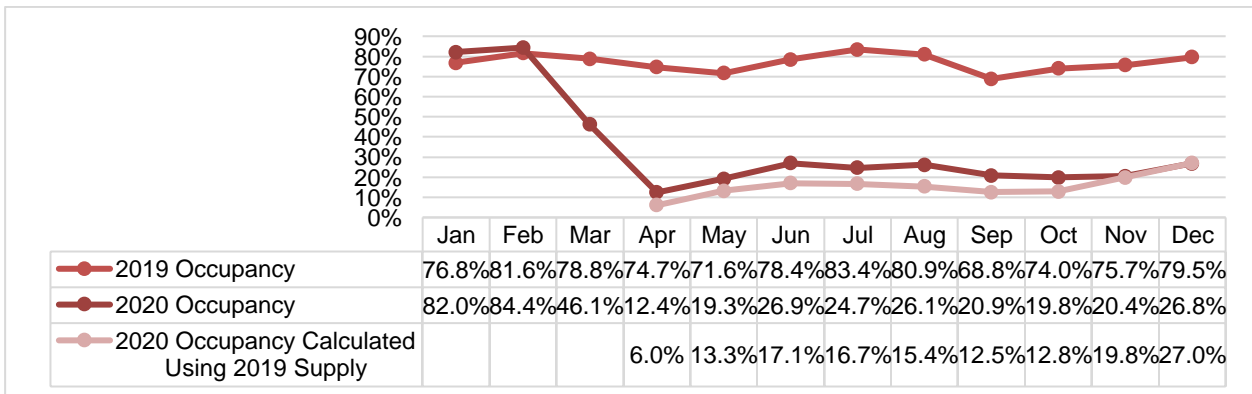
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 13: Monthly Island of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



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

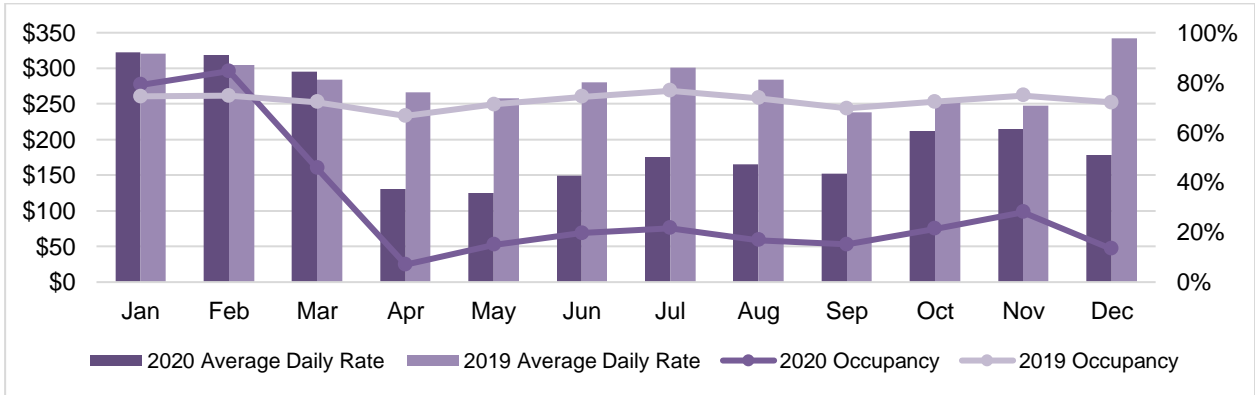
**Figure 14: Monthly Island of Hawai'i Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



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

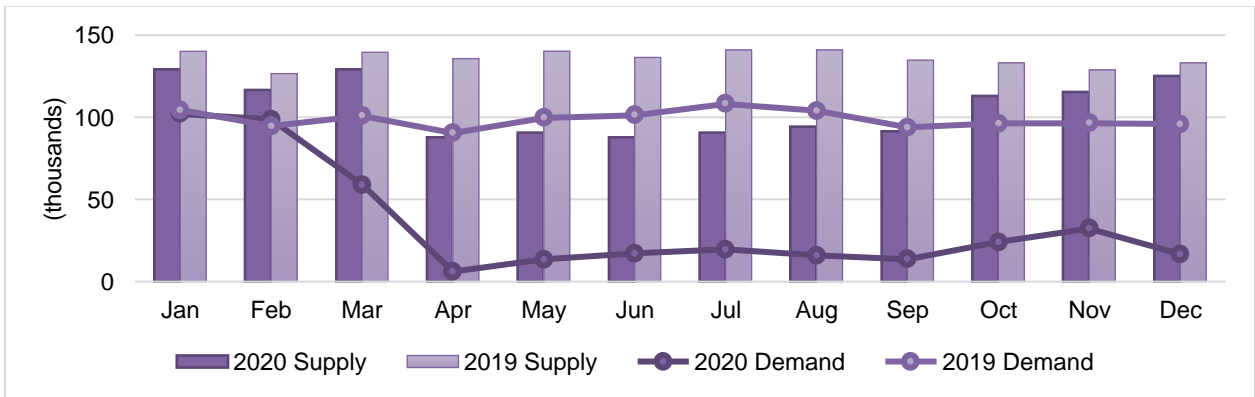


**Figure 15: Monthly Kaua'i Hotel Performance, 2020 vs. 2019**



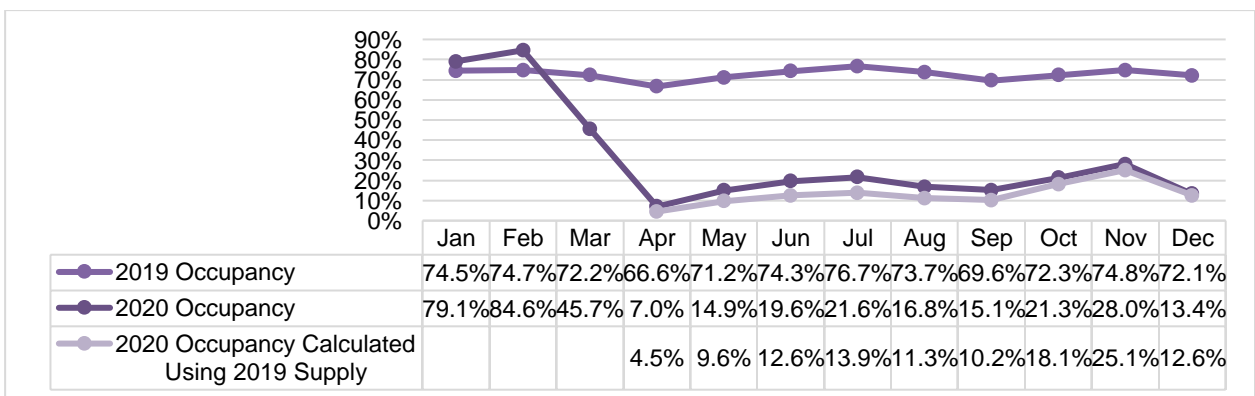
Source: STR, Inc. © Copyright 2021 Hawai'i Tourism Authority.

**Figure 16: Monthly Kaua'i Hotel Supply and Demand, 2020 vs. 2019**



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

**Figure 17: Monthly Kauai Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



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

**Figure 18: Hawai'i Hotel Performance Year-to-Date December 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	37.1%	80.8%	-43.7%	\$267.39	\$283.05	-5.5%	\$99.24	\$228.78	-56.6%
Luxury Class	38.3%	76.2%	-37.9%	\$612.75	\$563.35	8.8%	\$234.98	\$429.39	-45.3%
Upper Upscale Class	37.8%	82.6%	-44.8%	\$271.19	\$278.87	-2.8%	\$102.54	\$230.38	-55.5%
Upscale Class	32.1%	79.1%	-47.0%	\$206.96	\$209.86	-1.4%	\$66.49	\$166.04	-60.0%
Upper Midscale Class	40.3%	83.1%	-42.8%	\$161.46	\$166.67	-3.1%	\$65.08	\$138.53	-53.0%
Midscale & Economy Class	43.2%	82.1%	-38.8%	\$165.11	\$177.05	-6.7%	\$71.37	\$145.32	-50.9%
<b>O'ahu</b>	39.0%	84.1%	-45.1%	\$215.57	\$240.92	-10.5%	\$84.04	\$202.69	-58.5%
Waikiki	37.4%	84.5%	-47.1%	\$214.45	\$236.15	-9.2%	\$80.19	\$199.53	-59.8%
Other O'ahu	47.6%	82.0%	-34.4%	\$220.35	\$270.47	-18.5%	\$104.91	\$221.68	-52.7%
O'ahu Luxury	NA	74.1%	NA	NA	\$499.67	NA	NA	\$370.14	NA
O'ahu Upper Upscale	37.2%	85.3%	-48.1%	\$242.74	\$260.79	-6.9%	\$90.22	\$222.44	-59.4%
O'ahu Upscale	38.5%	85.6%	-47.2%	\$189.05	\$198.07	-4.6%	\$72.69	\$169.60	-57.1%
O'ahu Upper Midscale	39.8%	83.3%	-43.5%	\$154.49	\$160.64	-3.8%	\$61.45	\$133.85	-54.1%
O'ahu Midscale & Economy	51.5%	87.6%	-36.1%	\$124.78	\$134.55	-7.3%	\$64.31	\$117.87	-45.4%
<b>Maui County</b>	33.9%	77.7%	-43.8%	\$414.26	\$401.10	3.3%	\$140.42	\$311.61	-54.9%
Wailea	NA	88.4%	NA	NA	\$618.32	NA	NA	\$546.83	NA
Lahaina/Kā'anapali/Kapalua	29.1%	76.6%	-47.5%	\$370.19	\$335.19	10.4%	\$107.78	\$256.68	-58.0%
Other Maui County	39.9%	79.1%	-39.2%	\$454.55	\$481.04	-5.5%	\$181.29	\$380.40	-52.3%
Maui County Luxury	41.1%	79.9%	-38.8%	\$721.21	\$642.69	12.2%	\$296.73	\$513.64	-42.2%
Maui County Upper Upscale & Upscale	31.1%	77.6%	-46.5%	\$337.07	\$315.67	6.8%	\$104.69	\$244.89	-57.3%
<b>Island of Hawai'i</b>	38.0%	77.0%	-39.0%	\$254.27	\$265.44	-4.2%	\$96.71	\$204.50	-52.7%
Kohala Coast	NA	77.7%	NA	NA	\$377.94	NA	NA	\$293.64	NA
<b>Kaua'i</b>	33.0%	72.8%	-39.7%	\$261.98	\$282.67	-7.3%	\$86.50	\$205.65	-57.9%

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 19: Hawai'i Hotel Performance by Measure Year-to-Date December 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	14,091.8	19,714.0	-28.5%	5,230.3	15,934.0	-67.2%	1,398.5	4,510.2	-69.0%
<b>O'ahu</b>	7,698.4	11,087.5	-30.6%	3,001.1	9,328.1	-67.8%	647.0	2,247.3	-71.2%
Waikiki	6,500.2	9,507.5	-31.6%	2,430.6	8,033.1	-69.7%	521.2	1,897.0	-72.5%
<b>Maui County</b>	3,346.5	4,639.3	-27.9%	1,134.3	3,604.2	-68.5%	469.9	1,445.6	-67.5%
Wailea	NA	800.8	NA	NA	708.2	NA	NA	437.9	NA
Lahaina/Kā'anapali/Kapalua	1,860.7	2,579.6	-27.9%	541.7	1,975.4	-72.6%	200.5	662.1	-69.7%
<b>Island of Hawai'i</b>	1,772.2	2,354.7	-24.7%	674.0	1,814.1	-62.8%	171.4	481.5	-64.4%
Kohala Coast	NA	1,087.7	NA	NA	845.1	NA	NA	319.4	NA
<b>Kaua'i</b>	1,274.7	1,632.5	-21.9%	420.9	1,187.7	-64.6%	110.3	335.7	-67.2%

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

**Figure 20: Top 5 U.S. Markets – Revenue Per Available Room – YTD December 2020**

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$99.24	-56.6%
2	Miami/Hialeah, FL	\$87.23	-41.4%
3	San Francisco/San Mateo, CA	\$74.03	-64.0%
4	New York, NY	\$70.69	-67.7%
5	Los Angeles/Long Beach, CA	\$67.97	-52.6%

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

**Figure 21: Top 5 U.S. Markets – Average Daily Rate – YTD December 2020**

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$267.39	-5.5%
2	Miami/Hialeah, FL	\$188.03	-4.1%
3	San Francisco/San Mateo, CA	\$177.30	-29.2%
4	New York, NY	\$151.60	-40.3%
5	Los Angeles/Long Beach, CA	\$138.95	-22.9%

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

**Figure 22: Top 5 U.S. Markets – Occupancy – YTD December 2020**

Rank	Destination	Occupancy	Percentage Pt. Change
1	Tampa/St Petersburg, FL	50.8%	-21.3%
2	Phoenix, AZ	49.8%	-20.7%
3	Norfolk/Virginia Beach, VA	49.1%	-14.4%
4	Los Angeles/Long Beach, CA	48.9%	-30.7%
5	San Diego, CA	48.4%	-28.3%
21	Hawaiian Islands	37.1%	-43.7%

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

**Figure 23: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD December 2020**

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$250.47	-30.3%
2	French Polynesia	\$245.22	-37.6%
3	Maui County	\$140.42	-54.9%
4	Aruba	\$125.35	-50.9%
5	Cabo San Lucas+	\$118.19	-27.1%
6	Hawai'i Island	\$96.71	-52.7%
7	Kaua'i	\$86.50	-57.9%
8	O'ahu	\$84.04	-58.5%
9	Cancun+	\$65.03	-48.2%
10	Puerto Rico	\$64.46	-53.6%
11	Costa Rica	\$51.93	-55.2%
12	Phuket	\$35.24	-59.3%
13	Puerto Vallarta+	\$34.42	-43.1%
14	Fiji	\$26.09	-77.5%
15	Bali	\$17.88	-76.1%

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

**Figure 24: Competitive Sun and Sea Destinations – Average Daily Rate – YTD December 2020**

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$781.87	42.8%
2	French Polynesia	\$579.18	2.3%
3	Maui County	\$414.26	3.3%
4	Aruba	\$375.68	10.4%
5	Cabo San Lucas+	\$359.06	12.1%
6	Kaua'i	\$261.98	-7.3%
7	Hawai'i Island	\$254.27	-4.2%
8	O'ahu	\$215.57	-10.5%
9	Puerto Rico	\$194.92	-8.2%
10	Cancun+	\$185.51	0.8%
11	Costa Rica	\$178.36	1.8%
12	Phuket	\$134.90	9.9%
13	Fiji	\$100.98	-37.0%
14	Puerto Vallarta+	\$88.95	-1.2%
15	Bali	\$87.13	-19.2%

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

**Figure 25: Competitive Sun and Sea Destinations – Occupancy – YTD December 2020**

Rank	Destination	Occupancy	Percentage Pt. Change
1	French Polynesia	42.3%	-27.0%
2	O'ahu	39.0%	-45.1%
3	Puerto Vallarta+	38.7%	-28.4%
4	Hawai'i Island	38.0%	-39.0%
5	Cancun+	35.1%	-33.1%
6	Maui County	33.9%	-43.8%
7	Aruba	33.4%	-41.7%
8	Puerto Rico	33.1%	-32.4%
9	Kaua'i	33.0%	-39.7%
10	Cabo San Lucas+	32.9%	-17.7%
11	Maldives	32.0%	-33.6%
12	Costa Rica	29.1%	-37.0%
13	Phuket	26.1%	-44.4%
14	Fiji	25.8%	-46.3%
15	Bali	20.5%	-48.8%

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