



## March 2022 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported substantially higher revenue per available room (RevPAR), average daily rate (ADR), and occupancy in March 2022 compared to March 2021 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 March 2019, statewide ADR and RevPAR was higher in March 2022, but occupancy was slightly lower.

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in March 2022 was \$284 (+132.3%), with ADR at \$378 (+32.9%) and occupancy of 75.2 percent (+32.2 percentage points) compared to March 2021 (Figure 1). Compared with March 2019, RevPAR was 26.6 percent higher, driven by substantially higher ADR (+32.8%) which more than offset lower occupancy (-3.7 percentage points) (Figure 3).

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 March, the survey included 147 properties representing 46,076 rooms, or 83.0 percent of all 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.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

Hawai'i hotel room revenues statewide rose to \$489.1million (+149.1% vs. 2021, +30.1% vs. 2019) in March. Room demand was 1.3 million room nights (+87.4% vs. 2021, -2.0% vs. 2019) and room supply was 1.7 million room nights (+7.2% vs. 2021, +2.7% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$537 (+80.2% vs. 2021, +21.8% vs. 2019), with ADR at \$887 (+14.8% vs. 2021, +52.0% vs. 2019) and occupancy of 60.5 percent (+22.0 percentage points vs. 2021, -15.0 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$168 (+151.0% vs. 2021, +15.3% vs. 2019) with ADR at \$210 (+41.6% vs. 2021, +16.7% vs. 2019) and occupancy of 80.2 percent (+35.0 percentage points vs. 2021, -1.0 percentage points vs. 2019).

Maui County hotels led the counties in March and achieved RevPAR that surpassed March 2019. RevPAR was \$465 (+103.1% vs. 2021, +39.6% vs. 2019), with ADR at \$632 (+36.0% vs. 2021, +48.9% vs. 2019) and occupancy of 73.5 percent (+24.3 percentage points vs. 2021, -4.9 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$666 (+83.8% vs. 2021, +14.6% vs. 2019), with ADR at \$1,000 (+24.6% vs. 2021, +55.9% vs. 2019) and occupancy of 66.6 percent (+21.4 percentage points vs. 2021, -24.0 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$424 (+132.1% vs. 2021, +53.9% vs. 2019), ADR at \$560 (+47.0% vs. 2021, +57.6% vs. 2019) and occupancy of 75.8 percent (+27.8 percentage points vs. 2021, -1.8 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$373 (+580.1% vs. 2021, +81.6% vs. 2019), with ADR at \$465 (+149.4% vs. 2021, +63.6% vs. 2019) and occupancy of 80.1 percent (+50.8 percentage points vs. 2021, +7.9 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$337 (+121.3% vs. 2021, +56.0% vs. 2019), with ADR at \$420 (+32.9% vs. 2021, +53.1% vs. 2019), and occupancy of 80.3 percent (+32.1 percentage points vs. 2021, +1.5 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$520 (+105.9% vs. 2021, +68.3% vs. 2019), with ADR at \$662 (+43.3% vs. 2021, +71.8% vs. 2019), and occupancy of 78.5 percent (+23.8 percentage points vs. 2021, -1.6 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$181 (+142.5% vs. 2021, -1.7% vs. 2019) in March, ADR at \$244 (+33.3% vs. 2021, +6.3% vs. 2019) and occupancy of 74.0 percent (+33.3 percentage points vs. 2021, -6.0 percentage points vs. 2019). Waikīkī hotels earned \$172 (+152.5% vs. 2021, -3.6% vs. 2019) in RevPAR with ADR at \$230 (+33.4% vs. 2021, +2.9% vs. 2019) and occupancy of 75.0 percent (+35.4 percentage points vs. 2021, -5.0 percentage points vs. 2019).

### **First Quarter 2022**

During the first quarter of 2022, Hawai'i's hotels earned \$256 in RevPAR (+195.8% vs. 2021, +9.3% vs. 2019), with ADR at \$362 (+34.5% vs. 2021, +24.3% vs. 2019) and occupancy of 70.8 percent (+38.6 percentage points vs. 2021, -9.7 percentage points vs. 2019).

Total statewide hotel revenues for first quarter 2022 were \$1.28 billion (+219.1% vs. 2021, +12.2% vs. 2019). Room supply was 5.0 million room nights (+7.9% vs. 2021, +2.7% vs. 2019), and room demand was 3.5 million room nights (+137.3% vs. 2021, -9.7% vs. 2019).

### **Comparison to Top U.S. Markets**

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest Q1 2022 RevPAR at \$256 (+195.8%). Miami, Florida was second at \$241 (+72.4%), followed by Phoenix, Arizona at \$146 (+94.3%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in Q1 2022 ADR at \$362 (+34.5%), followed by Miami, Florida at \$311 (+42.7%) and Phoenix, Arizona at \$198 (+55.7%) (Figure 20).

In the first quarter of 2022, Miami, Florida topped the country in occupancy at 77.5 percent (+13.4 percentage points), followed by Tampa, Florida at 77.4 percent (+12.0 percentage points), and Phoenix, Arizona at 73.8 percent (+14.6 percentage points). The Hawaiian Islands ranked fifth at 70.8 percent (+38.6 percentage points)

### **Comparison to International Markets**

Hotels in the Maldives ranked highest in first quarter RevPAR for international "sun and sea" destinations at \$625 (+27.7%), followed by Maui County (\$413, +164.2%), Hawai'i Island (\$310, +192.6%), and Kaua'i (302, +594.5%). O'ahu ranked ninth (\$169, +209.2%)(Figure 22).

Maldives led in ADR at \$834 (+7.4%), followed by Maui County (\$610, +33.9%) and French Polynesia (\$577, +13.2%). Kaua'i (\$405, +123.1%), Hawai'i Island (\$405, +39.6%), and O'ahu (\$241, +37.4%) ranked sixth, seventh, and ninth, respectively (Figure 23).

Hawai'i Island led in occupancy for "sun and sea" destinations at 76.5 percent (+40.0 percentage points), followed by Maldives (75.0%, +11.9 percentage points) and Kaua'i (74.6%, +50.6 percentage points). O'ahu ranked fifth (70.2%, +39.0 percentage points) and Maui County ranked seventh (67.7%, +33.4 percentage points) (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 March, the survey included 147 properties representing 46,076 rooms, or 83.0 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The March survey included 74 properties on O'ahu representing 28,215 rooms (92.1%); 41 properties in the County of Maui, representing 9,786 rooms (73.7%); 16 properties on the island of Hawai'i, representing 4,889 rooms (69.7%); and 16 properties on Kaua'i, representing 3,186 rooms (69.2%).

### **About the Hawai'i Tourism Authority**

The Hawai'i Tourism Authority is the state agency responsible for holistically managing tourism in a sustainable manner consistent with community desires, economic goals, cultural values, preservation of natural resources, and visitor industry needs. HTA works with the community and industry to *Mālama Ku'u Home* – care for our beloved home. For more information about HTA, visit [www.hawaii tourism authority.org](http://www.hawaii tourism authority.org) or follow @HawaiiHTA on [Facebook](#), [Instagram](#), and [Twitter](#).

**Figure 1: Hawai'i Hotel Performance March 2022**

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2021	Percentage Pt. Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	75.2%	43.0%	32.2%	\$377.96	\$284.41	32.9%	\$284.16	\$122.35	132.3%
Luxury Class	60.5%	38.5%	22.0%	\$887.08	\$772.88	14.8%	\$536.53	\$297.81	80.2%
Upper Upscale Class	78.3%	40.9%	37.4%	\$357.12	\$259.79	37.5%	\$279.60	\$106.27	163.1%
Upscale Class	79.0%	46.9%	32.2%	\$259.35	\$182.17	42.4%	\$204.96	\$85.39	140.0%
Upper Midscale Class	73.9%	47.7%	26.2%	\$234.02	\$172.77	35.5%	\$172.96	\$82.47	109.7%
Midscale & Economy Class	80.2%	45.2%	35.0%	\$209.65	\$148.09	41.6%	\$168.09	\$66.96	151.0%
<b>O'ahu</b>	74.0%	40.7%	33.3%	\$243.95	\$182.95	33.3%	\$180.52	\$74.45	142.5%
Waikiki	75.0%	39.6%	35.4%	\$229.83	\$172.24	33.4%	\$172.40	\$68.29	152.5%
Other O'ahu	68.3%	47.4%	20.9%	\$331.32	\$239.97	38.1%	\$226.27	\$113.71	99.0%
O'ahu Luxury	50.3%	28.1%	22.2%	\$626.44	\$540.83	15.8%	\$314.99	\$151.74	107.6%
O'ahu Upper Upscale	76.8%	34.9%	41.8%	\$250.40	\$204.97	22.2%	\$192.27	\$71.62	168.5%
O'ahu Upscale	81.6%	52.0%	29.5%	\$194.73	\$150.55	29.3%	\$158.82	\$78.34	102.7%
O'ahu Upper Midscale	69.4%	46.5%	22.8%	\$156.66	\$118.81	31.9%	\$108.72	\$55.30	96.6%
O'ahu Midscale & Economy	75.7%	50.8%	24.9%	\$144.09	\$98.55	46.2%	\$109.06	\$50.10	117.7%
<b>Maui County</b>	73.5%	49.2%	24.3%	\$632.27	\$464.92	36.0%	\$464.66	\$228.75	103.1%
Wailea	66.6%	45.2%	21.4%	\$1,000.43	\$802.72	24.6%	\$666.44	\$362.68	83.8%
Lahaina/Kā'anapali/Kapalua	75.8%	48.0%	27.8%	\$559.81	\$380.76	47.0%	\$424.23	\$182.77	132.1%
Other Maui County	70.8%	50.6%	20.2%	\$722.41	\$560.59	28.9%	\$511.67	\$283.89	80.2%
Maui County Luxury	60.2%	42.9%	17.3%	\$1,110.16	\$880.45	26.1%	\$668.74	\$377.76	77.0%
Maui County Upper Upscale & Upscale	78.2%	51.5%	26.7%	\$518.09	\$339.54	52.6%	\$404.96	\$174.88	131.6%
<b>Island of Hawai'i</b>	80.3%	48.2%	32.1%	\$419.60	\$315.72	32.9%	\$336.89	\$152.24	121.3%
Kohala Coast	78.5%	54.6%	23.8%	\$662.08	\$461.93	43.3%	\$519.53	\$252.37	105.9%
<b>Kaua'i</b>	80.1%	29.4%	50.8%	\$465.09	\$186.50	149.4%	\$372.70	\$54.80	580.1%

Source: STR, Inc. © Copyright 2022 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 March 2022**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2021	% Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	1,721.4	1,605.2	7.2%	1,294.2	690.6	87.4%	489.1	196.4	149.1%
<b>O'ahu</b>	949.5	872.1	8.9%	702.6	354.9	98.0%	171.4	64.9	164.0%
Waikiki	806.3	753.7	7.0%	604.9	298.8	102.4%	139.0	51.5	170.1%
<b>Maui County</b>	411.6	407.3	1.0%	302.5	200.4	50.9%	191.2	93.2	105.2%
Wailea	90.6	86.6	4.7%	60.3	39.1	54.3%	60.4	31.4	92.3%
Lahaina/Kā'anapali/Kapalua	221.2	222.1	-0.4%	167.7	106.6	57.3%	93.9	40.6	131.2%
<b>Island of Hawai'i</b>	217.5	209.7	3.7%	174.6	101.1	72.7%	73.3	31.9	129.5%
Kohala Coast	91.7	91.7	0.0%	72.0	50.1	43.6%	47.6	23.1	105.9%
<b>Kaua'i</b>	142.8	116.0	23.1%	114.4	34.1	235.8%	53.2	6.4	737.3%

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**Figure 3: Hawai'i Hotel Performance March 2022 vs. 2019**

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2019	Percentage Pt. Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	75.2%	78.8%	-3.7%	\$377.96	\$284.63	32.8%	\$284.16	\$224.39	26.6%
Luxury Class	60.5%	75.5%	-15.0%	\$887.08	\$583.55	52.0%	\$536.53	\$440.58	21.8%
Upper Upscale Class	78.3%	81.4%	-3.1%	\$357.12	\$274.93	29.9%	\$279.60	\$223.75	25.0%
Upscale Class	79.0%	75.0%	4.1%	\$259.35	\$216.06	20.0%	\$204.96	\$161.95	26.6%
Upper Midscale Class	73.9%	80.3%	-6.4%	\$234.02	\$162.57	44.0%	\$172.96	\$130.57	32.5%
Midscale & Economy Class	80.2%	81.1%	-1.0%	\$209.65	\$179.58	16.7%	\$168.09	\$145.73	15.3%
<b>O'ahu</b>	74.0%	80.0%	-6.0%	\$243.95	\$229.49	6.3%	\$180.52	\$183.58	-1.7%
Waikiki	75.0%	80.0%	-5.0%	\$229.83	\$223.42	2.9%	\$172.40	\$178.83	-3.6%
Other O'ahu	68.3%	79.7%	-11.4%	\$331.32	\$266.30	24.4%	\$226.27	\$212.30	6.6%
O'ahu Luxury	50.3%	69.3%	-19.0%	\$626.44	\$478.41	30.9%	\$314.99	\$331.49	-5.0%
O'ahu Upper Upscale	76.8%	82.0%	-5.2%	\$250.40	\$249.73	0.3%	\$192.27	\$204.77	-6.1%
O'ahu Upscale	81.6%	78.3%	3.3%	\$194.73	\$189.79	2.6%	\$158.82	\$148.59	6.9%
O'ahu Upper Midscale	69.4%	80.4%	-11.0%	\$156.66	\$154.27	1.6%	\$108.72	\$124.07	-12.4%
O'ahu Midscale & Economy	75.7%	84.6%	-8.9%	\$144.09	\$130.88	10.1%	\$109.06	\$110.78	-1.6%
<b>Maui County</b>	73.5%	78.4%	-4.9%	\$632.27	\$424.51	48.9%	\$464.66	\$332.89	39.6%
Wailea	66.6%	90.6%	-24.0%	\$1,000.43	\$641.76	55.9%	\$666.44	\$581.66	14.6%
Lahaina/Kā'anapali/Kapalua	75.8%	77.6%	-1.8%	\$559.81	\$355.22	57.6%	\$424.23	\$275.57	53.9%
Other Maui County	70.8%	79.5%	-8.7%	\$722.41	\$510.81	41.4%	\$511.67	\$406.05	26.0%
Maui County Luxury	60.2%	81.5%	-21.3%	\$1,110.16	\$696.61	59.4%	\$668.74	\$568.07	17.7%
Maui County Upper Upscale & Upscale	78.2%	78.2%	-0.1%	\$518.09	\$335.03	54.6%	\$404.96	\$262.15	54.5%
<b>Island of Hawai'i</b>	80.3%	78.8%	1.5%	\$419.60	\$274.06	53.1%	\$336.89	\$215.97	56.0%
Kohala Coast	78.5%	80.1%	-1.6%	\$662.08	\$385.49	71.8%	\$519.53	\$308.62	68.3%
<b>Kaua'i</b>	80.1%	72.2%	7.9%	\$465.09	\$284.24	63.6%	\$372.70	\$205.28	81.6%

Source: STR, Inc. © Copyright 2022 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 4: Hawai'i Hotel Performance by Measure March 2022 vs. 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2019	% Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	1,721.4	1,675.7	2.7%	1,294.2	1,321.0	-2.0%	489.1	376.0	30.1%
<b>O'ahu</b>	949.5	942.5	0.7%	702.6	753.9	-6.8%	171.4	173.0	-0.9%
Waikiki	806.3	808.8	-0.3%	604.9	647.3	-6.6%	139.0	144.6	-3.9%
<b>Maui County</b>	411.6	394.5	4.3%	302.5	309.4	-2.2%	191.2	131.3	45.6%
Wailea	90.6	68.0	33.2%	60.3	61.6	-2.1%	60.4	39.6	52.6%
Lahaina/Kā'anapali/Kapalua	221.2	221.2	0.0%	167.7	171.6	-2.3%	93.9	61.0	54.0%
<b>Island of Hawai'i</b>	217.5	199.1	9.2%	174.6	156.9	11.3%	73.3	43.0	70.4%
Kohala Coast	91.7	93.0	-1.4%	72.0	74.5	-3.4%	47.6	28.7	66.0%
<b>Kaua'i</b>	142.8	139.6	2.3%	114.4	100.8	13.5%	53.2	28.7	85.7%

Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority

**Figure 5: Hawai'i Hotel Performance Year-to-Date March 2022**

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2021	Percentage Pt. Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	70.8%	32.2%	38.6%	\$362.14	\$269.30	34.5%	\$256.29	\$86.65	195.8%
Luxury Class	56.8%	27.5%	29.3%	\$843.35	\$761.24	10.8%	\$478.72	\$209.10	128.9%
Upper Upscale Class	72.6%	29.3%	43.3%	\$334.46	\$248.99	34.3%	\$242.75	\$72.90	233.0%
Upscale Class	74.8%	36.0%	38.7%	\$253.80	\$177.42	43.1%	\$189.73	\$63.89	197.0%
Upper Midscale Class	71.1%	38.4%	32.7%	\$244.04	\$166.94	46.2%	\$173.46	\$64.09	170.7%
Midscale & Economy Class	79.1%	37.2%	41.9%	\$222.35	\$143.97	54.4%	\$175.77	\$53.51	228.5%
<b>O'ahu</b>	70.2%	31.2%	39.0%	\$240.73	\$175.26	37.4%	\$169.03	\$54.67	209.2%
Waikiki	70.4%	29.6%	40.8%	\$227.58	\$168.01	35.5%	\$160.13	\$49.75	221.9%
Other O'ahu	69.4%	41.9%	27.5%	\$315.83	\$209.88	50.5%	\$219.11	\$87.94	149.2%
O'ahu Luxury	44.9%	20.6%	24.2%	\$629.51	\$510.58	23.3%	\$282.36	\$105.37	168.0%
O'ahu Upper Upscale	72.0%	25.4%	46.6%	\$246.96	\$199.87	23.6%	\$177.93	\$50.83	250.0%
O'ahu Upscale	78.4%	41.0%	37.4%	\$196.14	\$149.67	31.0%	\$153.87	\$61.38	150.7%
O'ahu Upper Midscale	67.1%	38.0%	29.1%	\$157.07	\$118.24	32.8%	\$105.34	\$44.92	134.5%
O'ahu Midscale & Economy	76.2%	41.3%	34.9%	\$148.51	\$100.03	48.5%	\$113.11	\$41.31	173.8%
<b>Maui County</b>	67.7%	34.3%	33.4%	\$609.73	\$455.43	33.9%	\$412.86	\$156.29	164.2%
Wailea	64.0%	31.3%	32.7%	\$922.25	\$789.98	16.7%	\$590.23	\$247.31	138.7%
Lahaina/Kā'anapali/Kapalua	68.5%	32.0%	36.5%	\$535.14	\$372.85	43.5%	\$366.39	\$119.17	207.5%
Other Maui County	66.8%	37.1%	29.7%	\$699.21	\$540.67	29.3%	\$467.28	\$200.81	132.7%
Maui County Luxury	57.2%	30.6%	26.5%	\$1,036.61	\$867.73	19.5%	\$592.46	\$265.58	123.1%
Maui County Upper Upscale & Upscale	70.7%	35.3%	35.4%	\$485.77	\$326.19	48.9%	\$343.34	\$115.14	198.2%
<b>Island of Hawai'i</b>	76.5%	36.5%	40.0%	\$405.14	\$290.23	39.6%	\$310.07	\$105.96	192.6%
Kohala Coast	74.0%	38.0%	36.0%	\$633.76	\$443.96	42.8%	\$468.76	\$168.55	178.1%
<b>Kaua'i</b>	74.6%	24.0%	50.6%	\$405.48	\$181.75	123.1%	\$302.36	\$43.54	594.4%

Source: STR, Inc. © Copyright 2022 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 Year-to-Date March 2022**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2021	% Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	4,996.6	4,631.0	7.9%	3,536.2	1,490.1	137.3%	1,280.6	401.3	219.1%
<b>O'ahu</b>	2,755.8	2,496.4	10.4%	1,934.9	778.7	148.5%	465.8	136.5	241.3%
Waikiki	2,340.2	2,174.5	7.6%	1,646.7	643.9	155.7%	374.7	108.2	246.4%
<b>Maui County</b>	1,198.1	1,182.7	1.3%	811.3	405.9	99.9%	494.7	184.8	167.6%
Wailea	263.0	251.3	4.7%	168.3	78.7	113.9%	155.2	62.1	149.8%
Lahaina/Kā'anapali/Kapalua	646.3	645.0	0.2%	442.5	206.1	114.6%	236.8	76.9	208.1%
<b>Island of Hawai'i</b>	631.9	616.7	2.5%	483.7	225.2	114.8%	195.9	65.4	199.8%
Kohala Coast	266.2	265.9	0.1%	196.9	100.9	95.1%	124.8	44.8	178.5%
<b>Kaua'i</b>	410.8	335.1	22.6%	306.3	80.3	281.6%	124.2	14.6	751.3%

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**Figure 7: Hawai'i Hotel Performance Year-to-Date March 2022 vs. 2019**

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2019	Percentage Pt. Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	70.8%	80.5%	-9.7%	\$362.14	\$291.30	24.3%	\$256.29	\$234.50	9.3%
Luxury Class	56.8%	75.7%	-19.0%	\$843.35	\$594.11	42.0%	\$478.72	\$450.01	6.4%
Upper Upscale Class	72.6%	82.7%	-10.1%	\$334.46	\$283.95	17.8%	\$242.75	\$234.91	3.3%
Upscale Class	74.8%	77.0%	-2.3%	\$253.80	\$222.24	14.2%	\$189.73	\$171.16	10.8%
Upper Midscale Class	71.1%	83.9%	-12.8%	\$244.04	\$166.12	46.9%	\$173.46	\$139.31	24.5%
Midscale & Economy Class	79.1%	83.2%	-4.2%	\$222.35	\$187.96	18.3%	\$175.77	\$156.43	12.4%
<b>O'ahu</b>	70.2%	82.8%	-12.6%	\$240.73	\$234.87	2.5%	\$169.03	\$194.55	-13.1%
Waikiki	70.4%	83.1%	-12.7%	\$227.58	\$229.73	-0.9%	\$160.13	\$190.81	-16.1%
Other O'ahu	69.4%	81.5%	-12.1%	\$315.83	\$266.58	18.5%	\$219.11	\$217.19	0.9%
O'ahu Luxury	44.9%	70.2%	-25.4%	\$629.51	\$497.71	26.5%	\$282.36	\$349.51	-19.2%
O'ahu Upper Upscale	72.0%	84.5%	-12.5%	\$246.96	\$256.63	-3.8%	\$177.93	\$216.87	-18.0%
O'ahu Upscale	78.4%	82.0%	-3.5%	\$196.14	\$192.55	1.9%	\$153.87	\$157.80	-2.5%
O'ahu Upper Midscale	67.1%	84.1%	-17.1%	\$157.07	\$157.44	-0.2%	\$105.34	\$132.46	-20.5%
O'ahu Midscale & Economy	76.2%	87.5%	-11.4%	\$148.51	\$133.91	10.9%	\$113.11	\$117.20	-3.5%
<b>Maui County</b>	67.7%	78.1%	-10.4%	\$609.73	\$433.46	40.7%	\$412.86	\$338.48	22.0%
Wailea	64.0%	88.8%	-24.8%	\$922.25	\$647.26	42.5%	\$590.23	\$574.63	2.7%
Lahaina/Kā'anapali/Kapalua	68.5%	76.9%	-8.4%	\$535.14	\$364.51	46.8%	\$366.39	\$280.28	30.7%
Other Maui County	66.8%	79.6%	-12.8%	\$699.21	\$518.44	34.9%	\$467.28	\$412.76	13.2%
Maui County Luxury	57.2%	80.3%	-23.2%	\$1,036.61	\$703.43	47.4%	\$592.46	\$565.04	4.9%
Maui County Upper Upscale & Upscale	70.7%	77.8%	-7.2%	\$485.77	\$345.43	40.6%	\$343.34	\$268.91	27.7%
<b>Island of Hawai'i</b>	76.5%	79.0%	-2.4%	\$405.14	\$285.15	42.1%	\$310.07	\$225.22	37.7%
Kohala Coast	74.0%	79.3%	-5.4%	\$633.76	\$400.99	58.0%	\$468.76	\$318.07	47.4%
<b>Kauai</b>	74.6%	73.8%	0.8%	\$405.48	\$303.10	33.8%	\$302.36	\$223.60	35.2%

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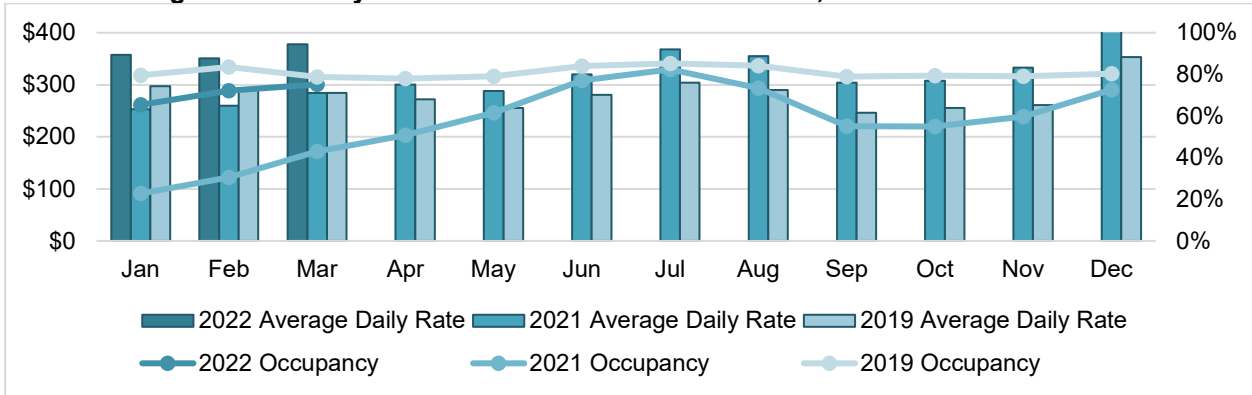
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

**Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date March 2022 vs. 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2019	% Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	4,996.6	4,865.9	2.7%	3,536.2	3,917.1	-9.7%	1,280.6	1,141.0	12.2%
<b>O'ahu</b>	2,755.8	2,736.2	0.7%	1,934.9	2,266.4	-14.6%	465.8	532.3	-12.5%
Waikiki	2,340.2	2,348.0	-0.3%	1,646.7	1,950.2	-15.6%	374.7	448.0	-16.4%
<b>Maui County</b>	1,198.1	1,145.3	4.6%	811.3	894.4	-9.3%	494.7	387.7	27.6%
Wailea	263.0	197.5	33.2%	168.3	175.3	-4.0%	155.2	113.5	36.8%
Lahaina/Kā'anapali/Kapalua	646.3	642.2	0.6%	442.5	493.8	-10.4%	236.8	180.0	31.6%
<b>Island of Hawai'i</b>	631.9	578.1	9.3%	483.7	456.6	5.9%	195.9	130.2	50.5%
Kohala Coast	266.2	270.0	-1.4%	196.9	214.2	-8.1%	124.8	85.9	45.3%
<b>Kauai</b>	410.8	406.3	1.1%	306.3	299.7	2.2%	124.2	90.9	36.7%

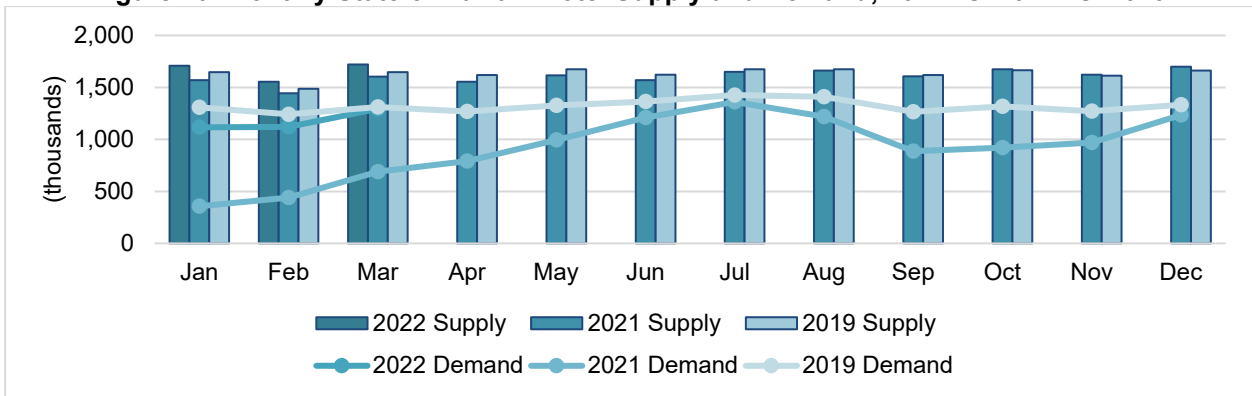
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**Figure 9: Monthly State of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



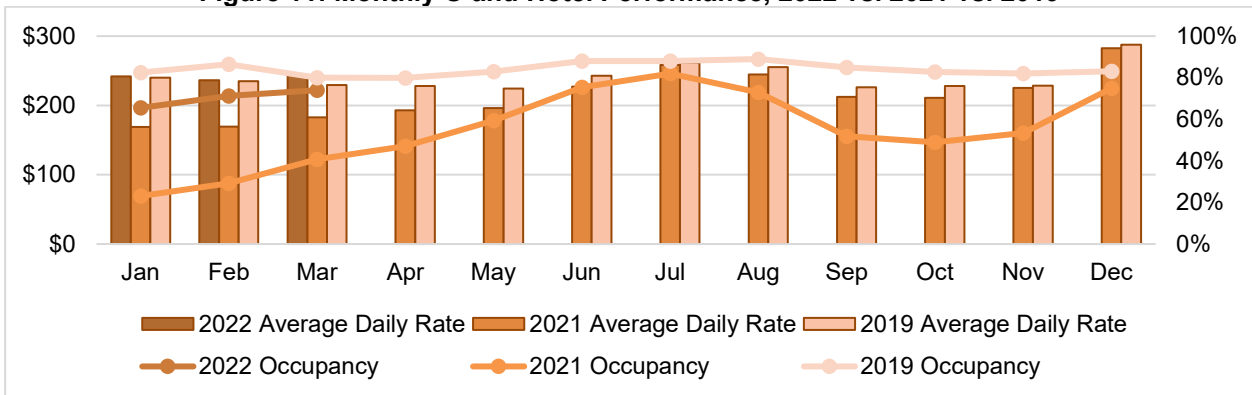
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**Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority.

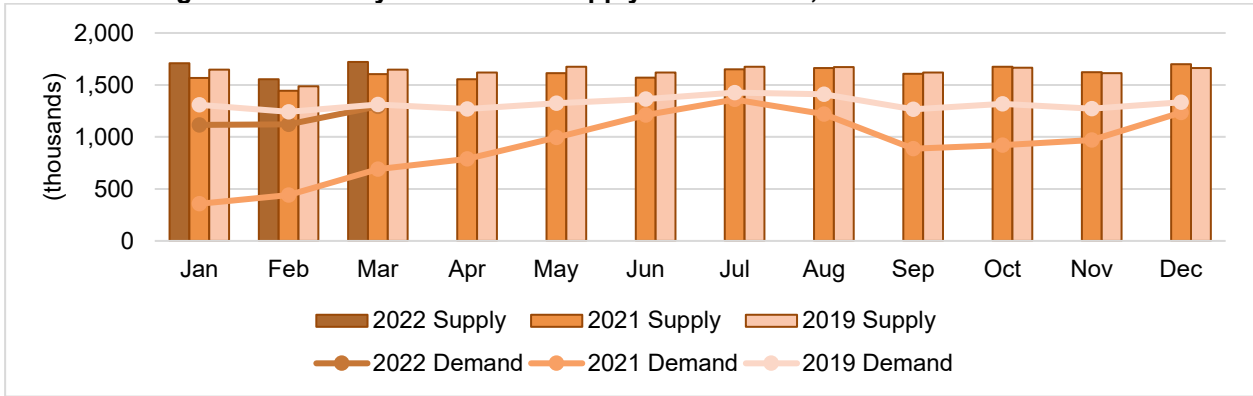
**Figure 11: Monthly O'ahu Hotel Performance, 2022 vs. 2021 vs. 2019**



Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority.

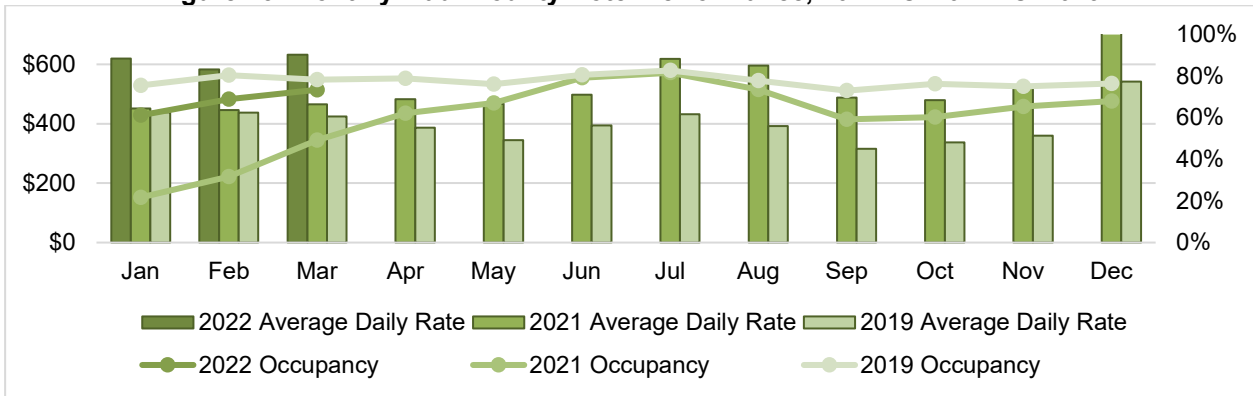


**Figure 12: Monthly O'ahu Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



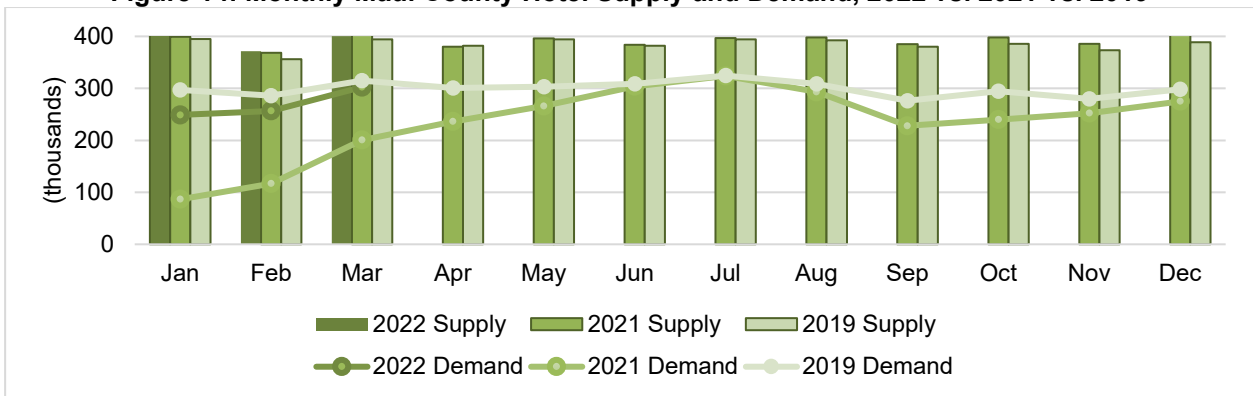
Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority.

**Figure 13: Monthly Maui County Hotel Performance, 2022 vs. 2021 vs. 2019**



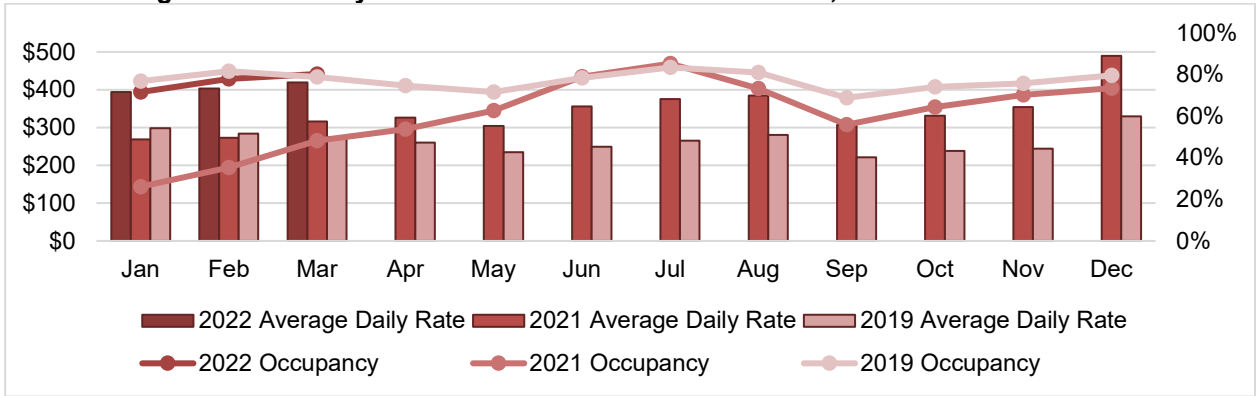
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**Figure 14: Monthly Maui County Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



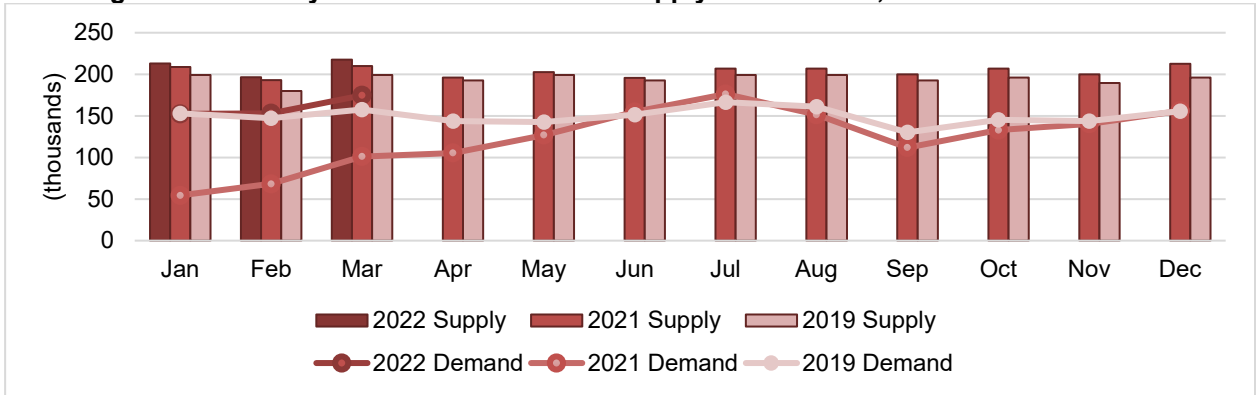
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**Figure 15: Monthly Island of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



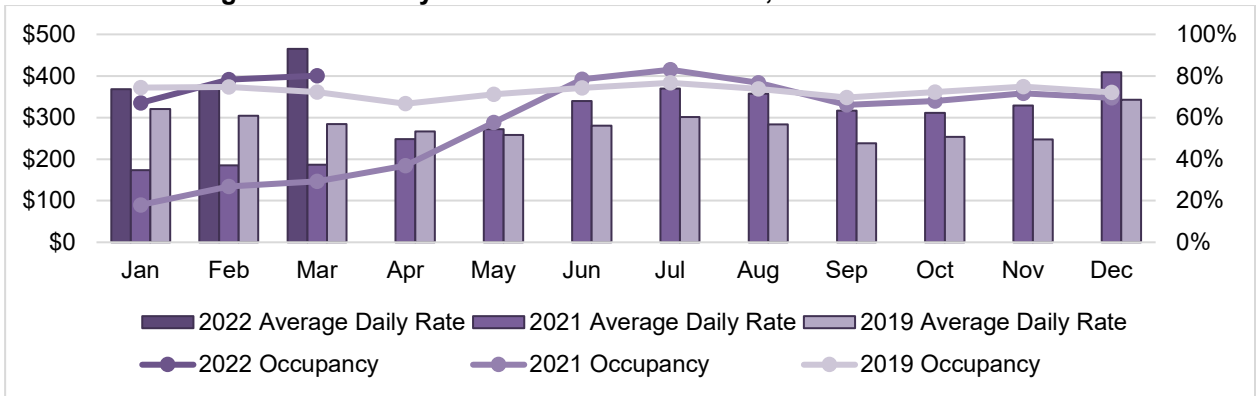
Source: STR, Inc. © Copyright 2022 Hawai'i Tourism Authority.

**Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



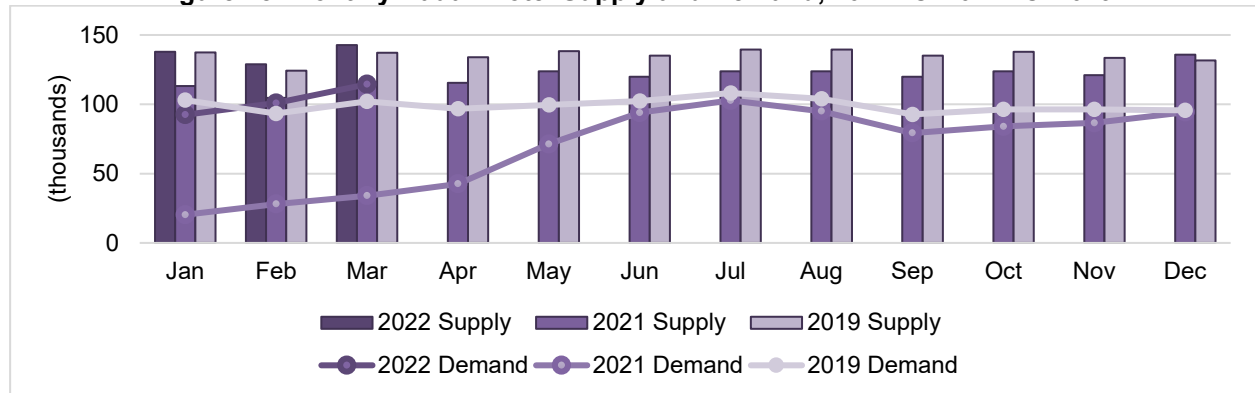
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**Figure 17: Monthly Kaua'i Hotel Performance, 2022 vs. 2021 vs. 2019**



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**Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



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**Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD March 2022**

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$256.29	195.8%
2	Miami, FL	\$241.05	72.4%
3	Phoenix, AZ	\$146.01	94.3%
4	Tampa, FL	\$141.64	60.8%
5	Los Angeles, CA	\$127.58	115.2%

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**Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD March 2022**

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$362.14	34.5%
2	Miami, FL	\$310.96	42.7%
3	Phoenix, AZ	\$197.88	55.7%
4	New York, NY	\$196.08	52.2%
5	Los Angeles, CA	\$193.56	61.8%

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**Figure 21: Top 5 U.S. Markets – Occupancy – YTD March 2022**

Rank	Destination	Occupancy	Percentage Pt. Change
1	Miami, FL	77.5%	13.4%
2	Tampa, FL	77.4%	12.0%
3	Phoenix, AZ	73.8%	14.6%
4	Orlando, FL	71.7%	26.4%
5	Hawaiian Islands	70.8%	38.6%

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**Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD March 2022**

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$625.45	27.7%
2	Maui County	\$412.86	164.2%
3	Hawai'i Island	\$310.07	192.6%
4	Kaua'i	\$302.36	594.5%
5	Cabo San Lucas+	\$288.52	103.6%
6	French Polynesia	\$281.00	173.3%
7	Aruba	\$237.27	172.6%
8	Puerto Rico	\$200.09	78.5%
9	O'ahu	\$169.03	209.2%
10	Cancun+	\$165.57	101.7%
11	Costa Rica	\$140.05	143.6%
12	Puerto Vallarta+	\$85.50	130.2%
13	Fiji	\$77.31	411.5%
14	Phuket	\$52.70	554.9%
15	Bali	\$15.57	149.1%

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**Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD March 2022**

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$834.36	7.4%
2	Maui County	\$609.73	33.9%
3	French Polynesia	\$577.01	13.2%
4	Cabo San Lucas+	\$449.68	16.7%
5	Aruba	\$433.37	34.8%
6	Kaua'i	\$405.48	123.1%
7	Hawai'i Island	\$405.14	39.6%
8	Puerto Rico	\$309.99	37.2%
9	O'ahu	\$240.73	37.4%
10	Cancun+	\$236.02	20.6%
11	Costa Rica	\$229.19	29.3%
12	Fiji	\$162.96	153.4%
13	Phuket	\$131.13	61.2%
14	Puerto Vallarta+	\$121.06	21.4%
15	Bali	\$63.01	5.5%

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**Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD March 2022**

<b>Rank</b>	<b>Destination</b>	<b>Occupancy</b>	<b>Percentage Pt. Change</b>
1	Hawai'i Island	76.5%	40.0%
2	Maldives	75.0%	11.9%
3	Kaua'i	74.6%	50.6%
4	Puerto Vallarta+	70.6%	33.4%
5	O'ahu	70.2%	39.0%
6	Cancun+	70.2%	28.2%
7	Maui County	67.7%	33.4%
8	Puerto Rico	64.5%	14.9%
9	Cabo San Lucas+	64.2%	27.4%
10	Costa Rica	61.1%	28.7%
11	Aruba	54.8%	27.7%
12	French Polynesia	48.7%	28.5%
13	Fiji	47.4%	23.9%
14	Phuket	40.2%	30.3%
15	Bali	24.7%	14.2%

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