



## December 2022 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported stronger revenue per available room (RevPAR) and average daily rate (ADR) in December 2022 compared to December 2021, but occupancy was lower. When compared to pre-pandemic December 2019, statewide ADR and RevPAR were also higher but occupancy rate was also lower in December 2022.

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in December 2022 was \$314 (+2.8%), with ADR at \$440 (+4.3%) and occupancy of 71.3 percent (-1.0 percentage points) compared to December 2021 (Figure 1). Compared with December 2019, RevPAR was 10.8 percent higher, driven by higher ADR (+24.7%) which offset lower occupancy (-9.0 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 December, the survey included 154 properties representing 46,563 rooms, or 84.2 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.

Hawai'i hotel room revenues statewide totaled \$537.7 million (+2.2% vs. 2021, +13.8% vs. 2019) in December. Room demand was 1.2 million room nights (-1.9% vs. 2021, -8.7% vs. 2019) and room supply was 1.7 million room nights (-0.5% vs. 2021, +2.7% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$629 (+2.1% vs. 2021, +7.9% vs. 2019), with ADR at \$1,102 (+5.1% vs. 2021, +38.7% vs. 2019) and occupancy of 57.1 percent (-1.7 percentage points vs. 2021, -16.3 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$182 (-12.6% vs. 2021, +5.4% vs. 2019) with ADR at \$243 (-12.0% vs. 2021, +15.8% vs. 2019) and occupancy of 75.0 percent (-0.5 percentage points vs. 2021, -7.3 percentage points vs. 2019).

Maui County hotels led the counties in December and achieved RevPAR of \$468 (-6.8% vs. 2021, +12.9% vs. 2019), with ADR at \$734 (-1.0% vs. 2021, +35.6% vs. 2019) and occupancy of 63.7 percent (-4.0 percentage points vs. 2021, -12.8 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$693 (-8.4% vs. 2021, -8.7% vs. 2019), with ADR at \$1,269 (+6.5% vs. 2021, +42.6% vs. 2019) and occupancy of 54.6 percent (-8.9 percentage points vs. 2021, -30.8 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$410 (+0.0% vs. 2021, +28.4% vs. 2019), ADR at \$615 (+4.7% vs. 2021, +44.9% vs. 2019) and occupancy of 66.5 percent (-3.1 percentage points vs. 2021, -8.6 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$320 (+15.9% vs. 2021, +29.8% vs. 2019), with ADR at \$444 (+8.3% vs. 2021, +29.6% vs. 2019) and occupancy of 72.1 percent (+4.7 percentage points vs. 2021, +0.1 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$344 (-3.0% vs. 2021, +31.3% vs. 2019), with ADR at \$479 (-1.5% vs. 2021, +45.6% vs. 2019), and occupancy of 71.8 percent (-1.1 percentage points vs. 2021, -7.8 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$518

(-7.6% vs. 2021, +32.9% vs. 2019), with ADR at \$798 (+0.1% vs. 2021, +62.1% vs. 2019), and occupancy of 64.8 percent (-5.4 percentage points vs. 2021, -14.2 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$238 (+12.3% vs. 2021, -0.3% vs. 2019) in December, ADR at \$320 (+13.1% vs. 2021, +11.3% vs. 2019) and occupancy of 74.4 percent (-0.6 percentage points vs. 2021, -8.7 percentage points vs. 2019). Waikīkī hotels earned RevPAR of \$227 (+13.9% vs. 2021, -2.7% vs. 2019), with ADR at \$304 (+14.1% vs. 2021, +8.7% vs. 2019) and occupancy of 74.8 percent (-0.1 percentage points vs. 2021, -8.7 percentage points vs. 2019).

## **Year End 2022**

In 2022, Hawai'i's hotels earned \$273 in RevPAR (+43.9% vs. 2021, +19.4% vs. 2019), with ADR at \$371 (+12.4% vs. 2021, +31.1% vs. 2019) and occupancy of 73.6 percent (+16.1 percentage points vs. 2021, -7.2 percentage points vs. 2019).

Total statewide hotel revenues for full year 2022 were \$5.5 billion (+48.4% vs. 2021, +22.7% vs. 2019). Room supply was 20.3 million room nights (+3.1% vs. 2021, +2.7% vs. 2019), and room demand was 14.9 million room nights (+32.0% vs. 2021, -6.4% vs. 2019).

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

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest annual 2022 RevPAR at \$273 (+43.9%). New York, New York was second at \$215 (+71.9%), followed by Miami, Florida at \$183 (+23.1%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in 2022 ADR at \$371 (+12.4%), followed by New York, New York at \$288 (+36.4%) and Miami, Florida at \$253 (+14.0%) (Figure 20).

For the full year 2022, New York, New York topped the country in occupancy at 74.8 percent (+15.5 percentage points), followed by the Hawaiian Islands at 73.6 percent (+16.1 percentage points) and Orlando, Florida at 72.8 percent (+15.1 percentage points).

## **Comparison to International Markets**

Hotels in French Polynesia ranked highest for 2022 RevPAR for international "sun and sea" destinations at \$506 (+49.4%), followed by Maui County (\$410, +25.9%). Kaua'i (\$309, +71.0%), Hawai'i Island (\$300, +43.4%), and O'ahu (\$202, +61.3%) ranked fourth, fifth, and eighth, respectively (Figure 22).

Hotels in French Polynesia led in 2022 ADR at \$722 (+0.8%), followed by Maldives (\$608, +6.5%) and Maui County (\$607, +12.3%). Hawai'i Island (\$400, +15.8%), Kaua'i (\$398, +26.1%), and O'ahu (\$268, +18.9%) ranked fourth, fifth, and ninth, respectively (Figure 23).

Kaua'i led in occupancy for "sun and sea" destinations at 77.7 percent (+20.4 percentage points), followed by O'ahu (75.4%, +19.8 percentage points) and Hawai'i Island (74.9%, +14.4 percentage points). Maui County ranked ninth (67.6%, +7.3 percentage points) (Figure 24).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiiauthority.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 154 properties representing 46,563 rooms, or 84.2 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The December survey included 77 properties on O'ahu representing 28,231 rooms (92.9%); 42 properties in the County of Maui, representing 9,991 rooms (74.6%); 16 properties on the island of Hawai'i, representing 4,889 rooms (70.6%); and 19 properties on Kaua'i, representing 3,452 rooms (75.0%).

### **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](https://www.facebook.com/HawaiiHTA), [Instagram](https://www.instagram.com/HawaiiHTA), and [Twitter](https://twitter.com/HawaiiHTA).

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

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2021	Percentage Pt. Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	71.3%	72.3%	-1.0%	\$440.11	\$422.15	4.3%	\$313.69	\$305.22	2.8%
Luxury Class	57.1%	58.8%	-1.7%	\$1,101.91	\$1,048.60	5.1%	\$629.18	\$616.20	2.1%
Upper Upscale Class	73.9%	75.7%	-1.9%	\$400.07	\$370.49	8.0%	\$295.46	\$280.56	5.3%
Upscale Class	76.3%	75.8%	0.4%	\$296.21	\$277.78	6.6%	\$225.88	\$210.66	7.2%
Upper Midscale Class	70.1%	70.1%	-0.1%	\$262.94	\$285.87	-8.0%	\$184.22	\$200.46	-8.1%
Midscale & Economy Class	75.0%	75.5%	-0.5%	\$243.15	\$276.34	-12.0%	\$182.44	\$208.75	-12.6%
<b>O'ahu</b>	74.4%	74.9%	-0.6%	\$319.96	\$282.91	13.1%	\$238.00	\$212.02	12.3%
Waikiki	74.8%	74.8%	-0.1%	\$304.15	\$266.64	14.1%	\$227.40	\$199.57	13.9%
Other O'ahu	72.3%	75.5%	-3.2%	\$411.31	\$373.76	10.0%	\$297.20	\$282.17	5.3%
O'ahu Luxury	60.3%	52.9%	7.4%	\$810.61	\$746.25	8.6%	\$488.73	\$394.62	23.8%
O'ahu Upper Upscale	76.1%	77.8%	-1.7%	\$326.32	\$286.48	13.9%	\$248.46	\$222.95	11.4%
O'ahu Upscale	80.5%	82.0%	-1.5%	\$238.61	\$220.76	8.1%	\$192.09	\$180.95	6.2%
O'ahu Upper Midscale	68.9%	69.5%	-0.5%	\$188.24	\$180.88	4.1%	\$129.79	\$125.67	3.3%
O'ahu Midscale & Economy	75.3%	77.5%	-2.1%	\$182.43	\$172.55	5.7%	\$137.40	\$133.67	2.8%
<b>Maui County</b>	63.7%	67.6%	-4.0%	\$734.40	\$742.02	-1.0%	\$467.69	\$501.86	-6.8%
Wailea	54.6%	63.6%	-8.9%	\$1,268.86	\$1,190.95	6.5%	\$693.31	\$756.94	-8.4%
Lahaina/Kā'anapali/Kapalua	66.5%	69.7%	-3.1%	\$615.44	\$588.04	4.7%	\$409.56	\$409.65	0.0%
Other Maui County	60.3%	65.2%	-4.9%	\$888.34	\$935.85	-5.1%	\$535.87	\$610.56	-12.2%
Maui County Luxury	52.3%	56.6%	-4.3%	\$1,434.44	\$1,363.98	5.2%	\$750.29	\$772.00	-2.8%
Maui County Upper Upscale & Upscale	68.1%	71.8%	-3.8%	\$554.21	\$539.51	2.7%	\$377.15	\$387.62	-2.7%
<b>Island of Hawai'i</b>	71.8%	72.8%	-1.1%	\$478.98	\$486.24	-1.5%	\$343.68	\$354.14	-3.0%
Kohala Coast	64.8%	70.2%	-5.4%	\$798.07	\$797.28	0.1%	\$517.52	\$560.03	-7.6%
<b>Kauai</b>	72.1%	67.4%	4.7%	\$444.00	\$409.90	8.3%	\$320.23	\$276.26	15.9%

Source: STR, Inc. © Copyright 2023 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 2022**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2021	% Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	1,714.2	1,723.4	-0.5%	1,221.8	1,246.1	-1.9%	537.7	526.0	2.2%
<b>O'ahu</b>	941.7	949.6	-0.8%	700.5	711.6	-1.6%	224.1	201.3	11.3%
Waikiki	798.7	806.4	-1.0%	597.1	603.6	-1.1%	181.6	160.9	12.8%
<b>Maui County</b>	415.0	416.2	-0.3%	264.3	281.5	-6.1%	194.1	208.9	-7.1%
Wailea	90.4	90.6	-0.2%	49.4	57.6	-14.2%	62.7	68.6	-8.6%
Lahaina/Kā'anapali/Kapalua	224.0	225.2	-0.5%	149.1	156.9	-5.0%	91.8	92.2	-0.5%
<b>Island of Hawai'i</b>	214.7	218.4	-1.7%	154.0	159.0	-3.1%	73.8	77.3	-4.6%
Kohala Coast	92.3	91.7	0.6%	59.8	64.4	-7.1%	47.7	51.4	-7.0%
<b>Kauai</b>	142.7	139.3	2.4%	102.9	93.9	9.6%	45.7	38.5	18.8%

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**Figure 3: Hawai'i Hotel Performance December 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>	71.3%	80.2%	-9.0%	\$440.11	\$353.00	24.7%	\$313.69	\$283.22	10.8%
Luxury Class	57.1%	73.4%	-16.3%	\$1,101.91	\$794.47	38.7%	\$629.18	\$583.37	7.9%
Upper Upscale Class	73.9%	81.6%	-7.7%	\$400.07	\$334.21	19.7%	\$295.46	\$272.70	8.3%
Upscale Class	76.3%	81.4%	-5.2%	\$296.21	\$239.93	23.5%	\$225.88	\$195.39	15.6%
Upper Midscale Class	70.1%	80.6%	-10.6%	\$262.94	\$202.83	29.6%	\$184.22	\$163.51	12.7%
Midscale & Economy Class	75.0%	82.4%	-7.3%	\$243.15	\$210.05	15.8%	\$182.44	\$173.04	5.4%
<b>O'ahu</b>	74.4%	83.1%	-8.7%	\$319.96	\$287.38	11.3%	\$238.00	\$238.71	-0.3%
Waikiki	74.8%	83.5%	-8.7%	\$304.15	\$279.92	8.7%	\$227.40	\$233.74	-2.7%
Other O'ahu	72.3%	80.5%	-8.2%	\$411.31	\$332.73	23.6%	\$297.20	\$267.84	11.0%
O'ahu Luxury	60.3%	75.3%	-15.0%	\$810.61	\$651.17	24.5%	\$488.73	\$490.15	-0.3%
O'ahu Upper Upscale	76.1%	83.0%	-6.9%	\$326.32	\$302.62	7.8%	\$248.46	\$251.16	-1.1%
O'ahu Upscale	80.5%	87.8%	-7.3%	\$238.61	\$226.03	5.6%	\$192.09	\$198.43	-3.2%
O'ahu Upper Midscale	68.9%	80.0%	-11.0%	\$188.24	\$194.98	-3.5%	\$129.79	\$155.97	-16.8%
O'ahu Midscale & Economy	75.3%	88.4%	-13.1%	\$182.43	\$161.20	13.2%	\$137.40	\$142.51	-3.6%
<b>Maui County</b>	63.7%	76.5%	-12.8%	\$734.40	\$541.45	35.6%	\$467.69	\$414.31	12.9%
Wailea	54.6%	85.4%	-30.8%	\$1,268.86	\$889.53	42.6%	\$693.31	\$759.78	-8.7%
Lahaina/Kā'anapali/Kapalua	66.5%	75.1%	-8.6%	\$615.44	\$424.66	44.9%	\$409.56	\$319.04	28.4%
Other Maui County	60.3%	78.2%	-17.9%	\$888.34	\$678.42	30.9%	\$535.87	\$530.61	1.0%
Maui County Luxury	52.3%	74.3%	-22.0%	\$1,434.44	\$983.19	45.9%	\$750.29	\$730.54	2.7%
Maui County Upper Upscale & Upscale	68.1%	77.5%	-9.5%	\$554.21	\$388.27	42.7%	\$377.15	\$301.07	25.3%
<b>Island of Hawai'i</b>	71.8%	79.5%	-7.8%	\$478.98	\$329.07	45.6%	\$343.68	\$261.73	31.3%
Kohala Coast	64.8%	79.1%	-14.2%	\$798.07	\$492.37	62.1%	\$517.52	\$389.38	32.9%
<b>Kauai</b>	72.1%	72.1%	0.1%	\$444.00	\$342.53	29.6%	\$320.23	\$246.80	29.8%

Source: STR, Inc. © Copyright 2023 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 December 2022 vs. 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2019	% Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	1,714.2	1,668.8	2.7%	1,221.8	1,338.9	-8.7%	537.7	472.6	13.8%
<b>O'ahu</b>	941.7	946.8	-0.5%	700.5	786.5	-10.9%	224.1	226.0	-0.8%
Waikiki	798.7	808.9	-1.3%	597.1	675.4	-11.6%	181.6	189.1	-3.9%
<b>Maui County</b>	415.0	391.0	6.2%	264.3	299.2	-11.7%	194.1	162.0	19.8%
Wailea	90.4	68.0	32.9%	49.4	58.1	-15.0%	62.7	51.7	21.3%
Lahaina/Kā'anapali/Kapalua	224.0	214.9	4.2%	149.1	161.5	-7.7%	91.8	68.6	33.8%
<b>Island of Hawai'i</b>	214.7	197.9	8.5%	154.0	157.4	-2.1%	73.8	51.8	42.4%
Kohala Coast	92.3	91.1	1.2%	59.8	72.1	-17.0%	47.7	35.5	34.5%
<b>Kauai</b>	142.7	133.1	7.2%	102.9	95.9	7.3%	45.7	32.9	39.1%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

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

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2021	Percentage Pt. Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	73.6%	57.5%	16.1%	\$371.21	\$330.32	12.4%	\$273.27	\$189.89	43.9%
Luxury Class	58.9%	50.8%	8.1%	\$849.28	\$773.46	9.8%	\$499.85	\$392.74	27.3%
Upper Upscale Class	76.7%	57.8%	18.9%	\$347.91	\$302.93	14.8%	\$266.83	\$175.11	52.4%
Upscale Class	77.3%	60.7%	16.6%	\$263.35	\$219.79	19.8%	\$203.55	\$133.49	52.5%
Upper Midscale Class	72.4%	56.7%	15.7%	\$235.35	\$225.13	4.5%	\$170.46	\$127.68	33.5%
Midscale & Economy Class	79.6%	61.6%	18.0%	\$224.67	\$213.31	5.3%	\$178.82	\$131.36	36.1%
<b>O'ahu</b>	75.4%	55.6%	19.8%	\$267.77	\$225.24	18.9%	\$201.79	\$125.12	61.3%
Waikiki	75.7%	55.2%	20.5%	\$254.13	\$212.07	19.8%	\$192.39	\$116.97	64.5%
Other O'ahu	73.4%	57.9%	15.5%	\$346.68	\$300.18	15.5%	\$254.49	\$173.85	46.4%
O'ahu Luxury	55.8%	42.3%	13.5%	\$652.17	\$593.42	9.9%	\$363.89	\$250.86	45.1%
O'ahu Upper Upscale	77.4%	54.6%	22.8%	\$275.83	\$238.48	15.7%	\$213.59	\$130.29	63.9%
O'ahu Upscale	81.9%	62.7%	19.2%	\$211.02	\$178.56	18.2%	\$172.87	\$111.95	54.4%
O'ahu Upper Midscale	70.7%	52.9%	17.8%	\$167.78	\$143.06	17.3%	\$118.62	\$75.74	56.6%
O'ahu Midscale & Economy	79.4%	62.3%	17.1%	\$162.19	\$134.61	20.5%	\$128.82	\$83.88	53.6%
<b>Maui County</b>	67.6%	60.3%	7.3%	\$606.92	\$540.61	12.3%	\$410.12	\$325.75	25.9%
Wailea	60.4%	56.3%	4.1%	\$964.09	\$832.03	15.9%	\$582.53	\$468.73	24.3%
Lahaina/Kā'anapali/Kapalua	69.9%	61.3%	8.6%	\$534.68	\$450.59	18.7%	\$373.64	\$276.27	35.2%
Other Maui County	64.9%	59.0%	5.9%	\$697.96	\$650.92	7.2%	\$452.78	\$384.12	17.9%
Maui County Luxury	54.5%	51.9%	2.6%	\$1,071.11	\$923.91	15.9%	\$584.08	\$479.86	21.7%
Maui County Upper Upscale & Upscale	72.5%	63.3%	9.1%	\$495.20	\$412.97	19.9%	\$358.91	\$261.53	37.2%
<b>Island of Hawai'i</b>	74.9%	60.5%	14.4%	\$400.10	\$345.42	15.8%	\$299.71	\$209.02	43.4%
Kohala Coast	70.8%	61.0%	9.8%	\$624.32	\$532.78	17.2%	\$441.90	\$324.95	36.0%
<b>Kaua'i</b>	77.7%	57.2%	20.4%	\$398.08	\$315.78	26.1%	\$309.13	\$180.77	71.0%

Source: STR, Inc. © Copyright 2023 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 December 2022**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2021	% Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	20,254.9	19,645.6	3.1%	14,910.6	11,293.7	32.0%	5,535.0	3,730.5	48.4%
<b>O'ahu</b>	11,133.6	10,697.7	4.1%	8,390.0	5,942.6	41.2%	2,246.6	1,338.5	67.8%
Waikiki	9,449.1	9,164.1	3.1%	7,153.5	5,054.4	41.5%	1,817.9	1,071.9	69.6%
<b>Maui County</b>	4,880.9	4,847.7	0.7%	3,298.2	2,921.0	12.9%	2,001.7	1,579.2	26.8%
Wailea	1,065.6	NA	NA	643.9	NA	NA	620.7	NA	NA
Lahaina/Kā'anapali/Kapalua	2,631.5	2,623.3	0.3%	1,838.9	1,608.4	14.3%	983.2	724.7	35.7%
<b>Island of Hawai'i</b>	2,562.4	2,536.2	1.0%	1,919.4	1,534.7	25.1%	768.0	530.1	44.9%
Kohala Coast	1,083.5	NA	NA	766.9	NA	NA	478.8	NA	NA
<b>Kaua'i</b>	1,678.0	1,564.0	7.3%	1,303.0	895.3	45.5%	518.7	282.7	83.5%

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**Figure 7: Hawai'i Hotel Performance Year-to-Date December 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>	73.6%	80.8%	-7.2%	\$371.21	\$283.05	31.1%	\$273.27	\$228.78	19.4%
Luxury Class	58.9%	76.2%	-17.4%	\$849.28	\$563.35	50.8%	\$499.85	\$429.39	16.4%
Upper Upscale Class	76.7%	82.6%	-5.9%	\$347.91	\$278.87	24.8%	\$266.83	\$230.38	15.8%
Upscale Class	77.3%	79.1%	-1.8%	\$263.35	\$209.86	25.5%	\$203.55	\$166.04	22.6%
Upper Midscale Class	72.4%	83.1%	-10.7%	\$235.35	\$166.67	41.2%	\$170.46	\$138.53	23.0%
Midscale & Economy Class	79.6%	82.1%	-2.5%	\$224.67	\$177.05	26.9%	\$178.82	\$145.32	23.1%
<b>O'ahu</b>	75.4%	84.1%	-8.8%	\$267.77	\$240.92	11.1%	\$201.79	\$202.69	-0.4%
Waikiki	75.7%	84.5%	-8.8%	\$254.13	\$236.15	7.6%	\$192.39	\$199.53	-3.6%
Other O'ahu	73.4%	82.0%	-8.6%	\$346.68	\$270.47	28.2%	\$254.49	\$221.68	14.8%
O'ahu Luxury	55.8%	74.1%	-18.3%	\$652.17	\$499.67	30.5%	\$363.89	\$370.14	-1.7%
O'ahu Upper Upscale	77.4%	85.3%	-7.9%	\$275.83	\$260.79	5.8%	\$213.59	\$222.44	-4.0%
O'ahu Upscale	81.9%	85.6%	-3.7%	\$211.02	\$198.07	6.5%	\$172.87	\$169.60	1.9%
O'ahu Upper Midscale	70.7%	83.3%	-12.6%	\$167.78	\$160.64	4.4%	\$118.62	\$133.85	-11.4%
O'ahu Midscale & Economy	79.4%	87.6%	-8.2%	\$162.19	\$134.55	20.5%	\$128.82	\$117.87	9.3%
<b>Maui County</b>	67.6%	77.7%	-10.1%	\$606.92	\$401.10	51.3%	\$410.12	\$311.61	31.6%
Wailea	60.4%	88.4%	-28.0%	\$964.09	\$618.32	55.9%	\$582.53	\$546.83	6.5%
Lahaina/Kā'anapali/Kapalua	69.9%	76.6%	-6.7%	\$534.68	\$335.19	59.5%	\$373.64	\$256.68	45.6%
Other Maui County	64.9%	79.1%	-14.2%	\$697.96	\$481.04	45.1%	\$452.78	\$380.40	19.0%
Maui County Luxury	54.5%	79.9%	-25.4%	\$1,071.11	\$642.69	66.7%	\$584.08	\$513.64	13.7%
Maui County Upper Upscale & Upscale	72.5%	77.6%	-5.1%	\$495.20	\$315.67	56.9%	\$358.91	\$244.89	46.6%
<b>Island of Hawai'i</b>	74.9%	77.0%	-2.1%	\$400.10	\$265.44	50.7%	\$299.71	\$204.50	46.6%
Kohala Coast	70.8%	77.7%	-6.9%	\$624.32	\$377.94	65.2%	\$441.90	\$293.64	50.5%
<b>Kauai</b>	77.7%	72.8%	4.9%	\$398.08	\$282.67	40.8%	\$309.13	\$205.65	50.3%

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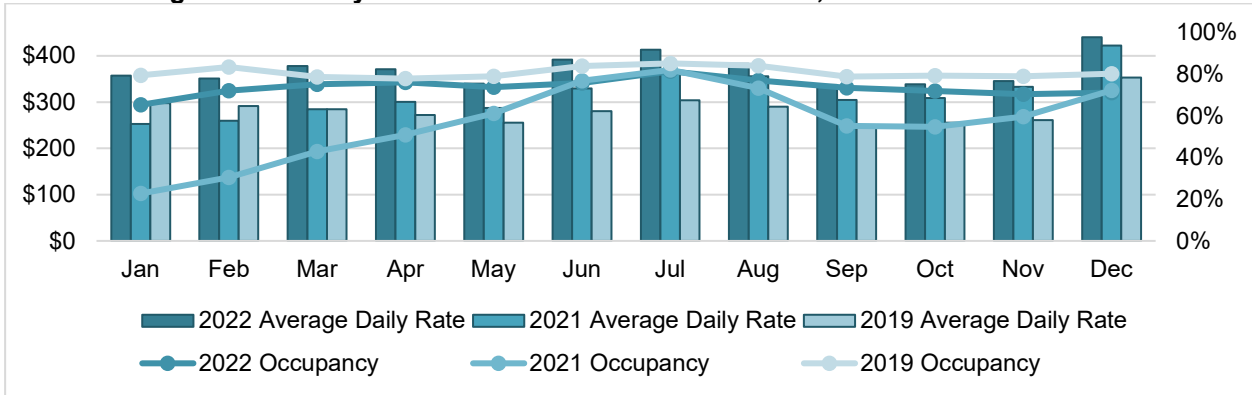
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2019	% Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	20,254.9	19,714.0	2.7%	14,910.6	15,934.0	-6.4%	5,535.0	4,510.2	22.7%
<b>O'ahu</b>	11,133.6	11,087.5	0.4%	8,390.0	9,328.1	-10.1%	2,246.6	2,247.3	0.0%
Waikiki	9,449.1	9,507.5	-0.6%	7,153.5	8,033.1	-11.0%	1,817.9	1,897.0	-4.2%
<b>Maui County</b>	4,880.9	4,639.3	5.2%	3,298.2	3,604.2	-8.5%	2,001.7	1,445.6	38.5%
Wailea	1,065.6	800.8	33.1%	643.9	708.2	-9.1%	620.7	437.9	41.8%
Lahaina/Kā'anapali/Kapalua	2,631.5	2,579.6	2.0%	1,838.9	1,975.4	-6.9%	983.2	662.1	48.5%
<b>Island of Hawai'i</b>	2,562.4	2,354.7	8.8%	1,919.4	1,814.1	5.8%	768.0	481.5	59.5%
Kohala Coast	1,083.5	1,087.7	-0.4%	766.9	845.1	-9.2%	478.8	319.4	49.9%
<b>Kauai</b>	1,678.0	1,632.5	2.8%	1,303.0	1,187.7	9.7%	518.7	335.7	54.5%

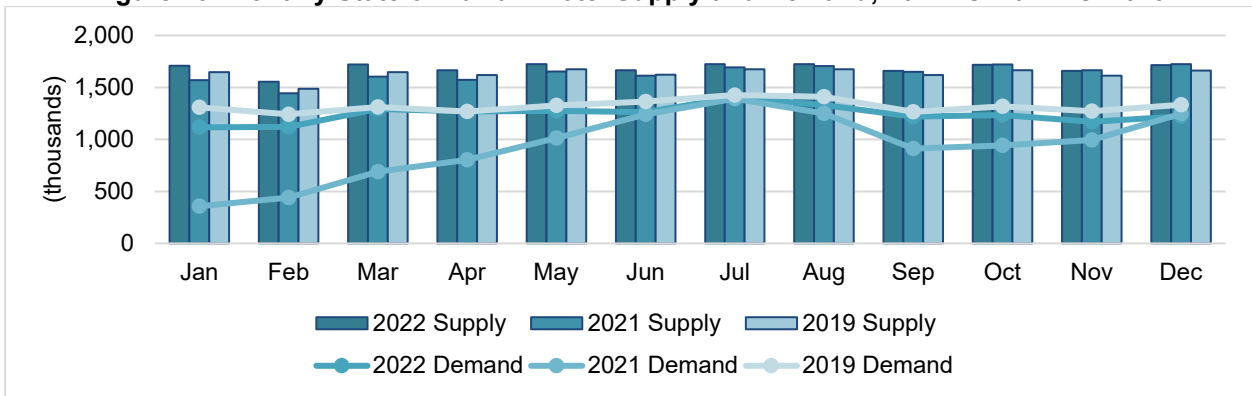
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**Figure 9: Monthly State of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



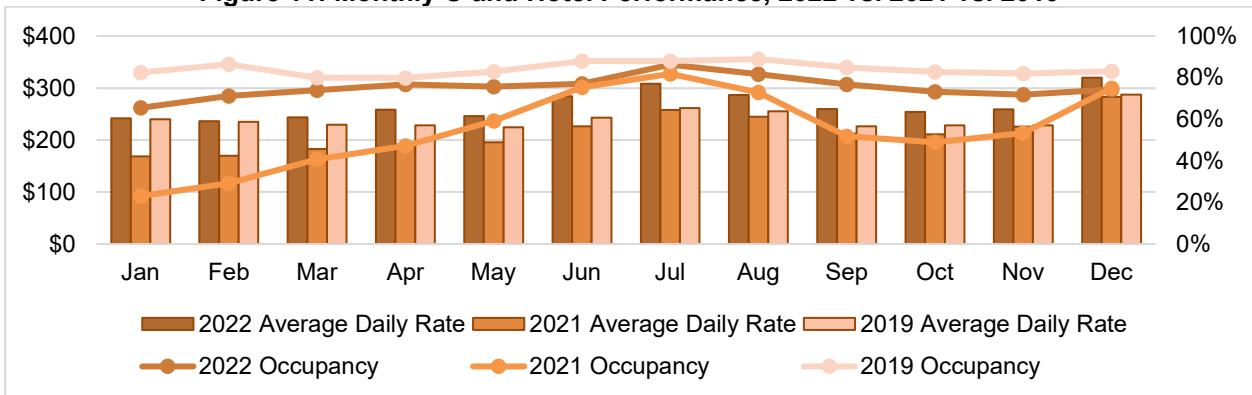
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**Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



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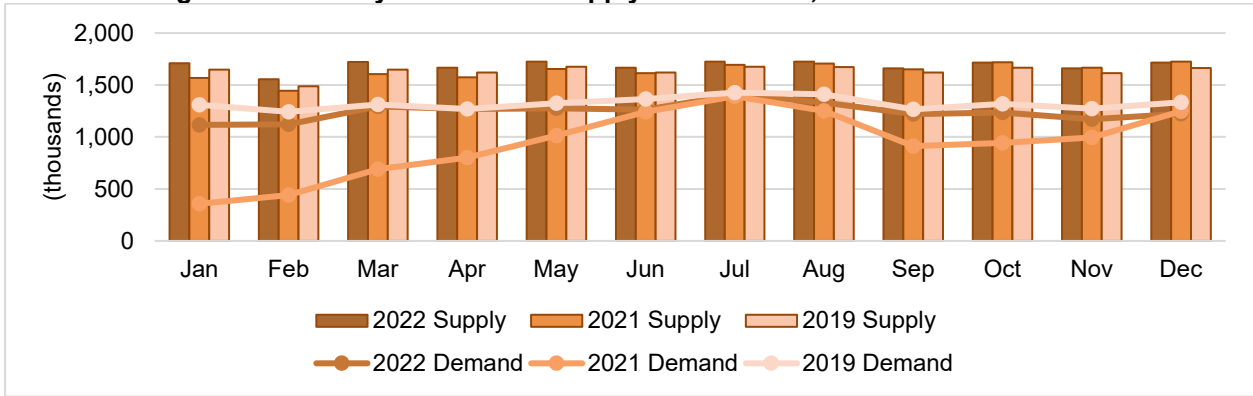
**Figure 11: Monthly O'ahu Hotel Performance, 2022 vs. 2021 vs. 2019**



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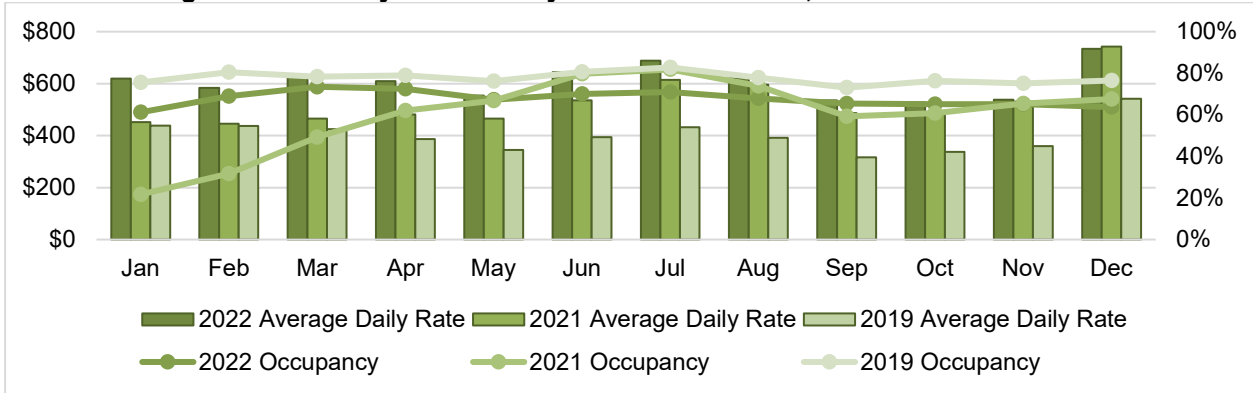


**Figure 12: Monthly O'ahu Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



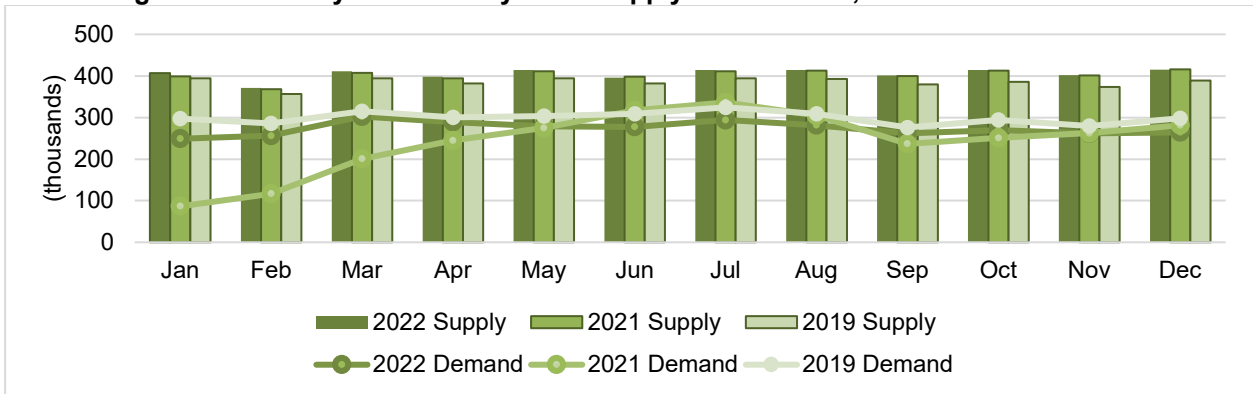
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**Figure 13: Monthly Maui County Hotel Performance, 2022 vs. 2021 vs. 2019**



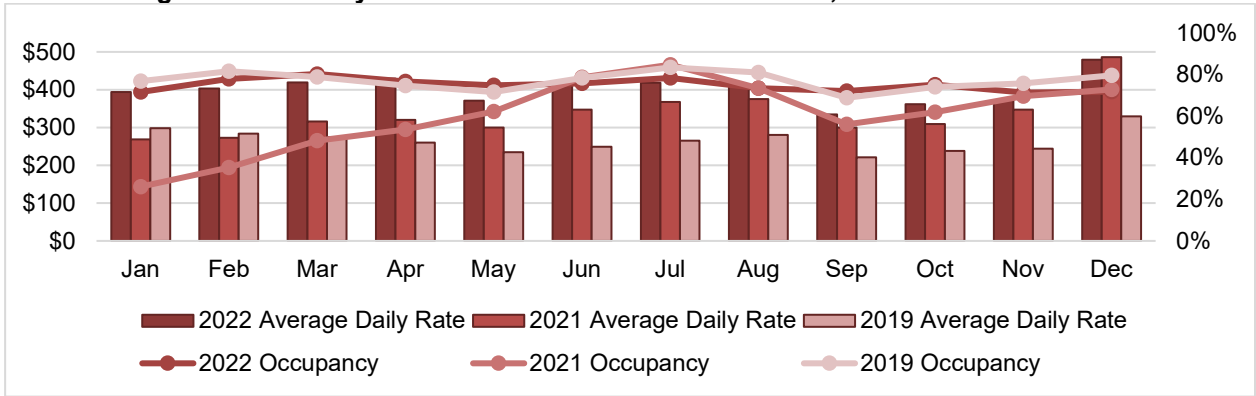
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**Figure 14: Monthly Maui County Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



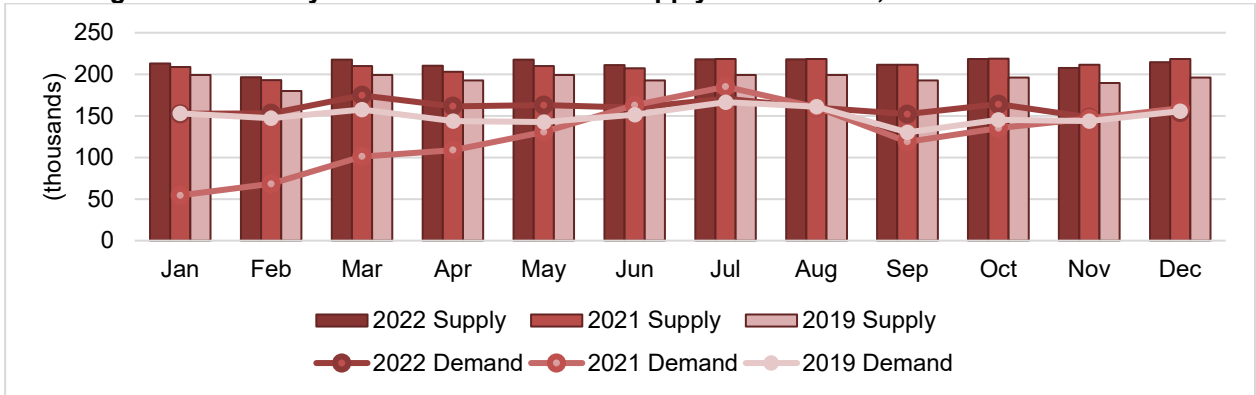
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**Figure 15: Monthly Island of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



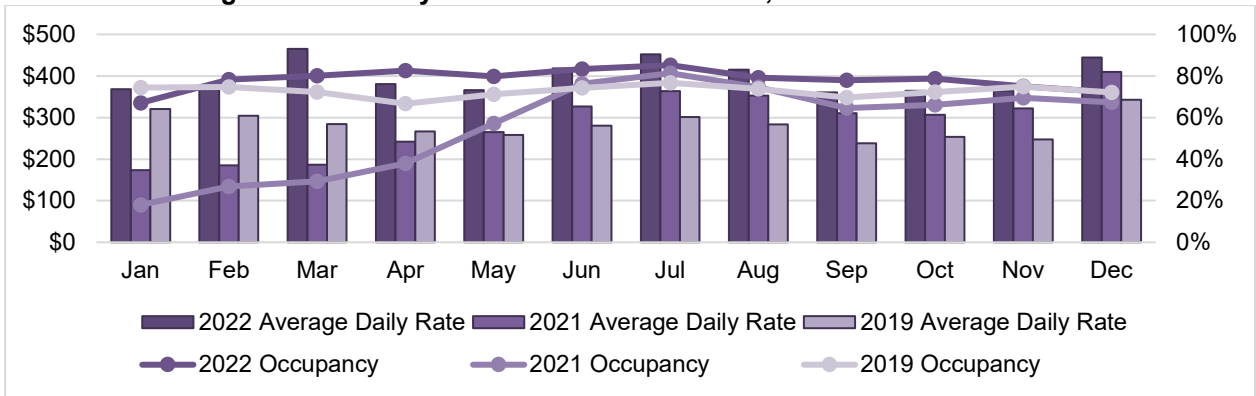
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**Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



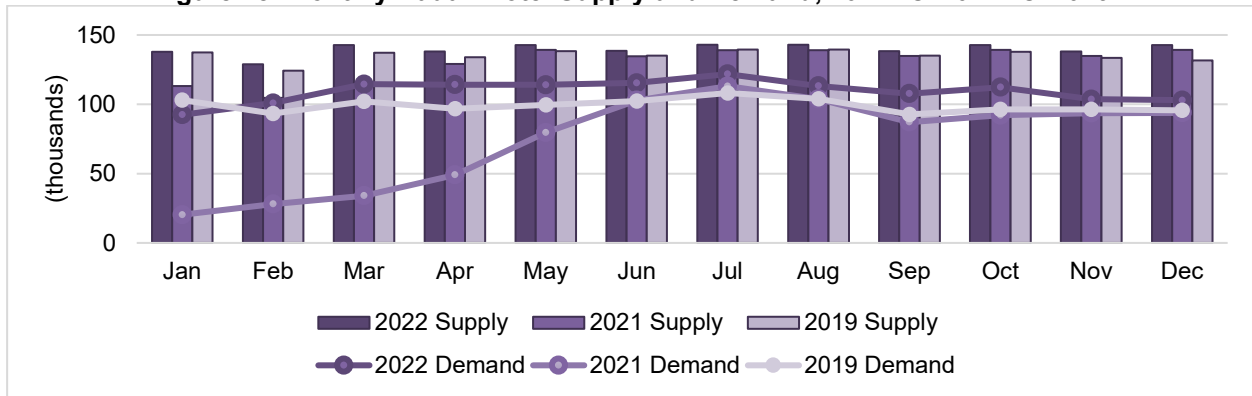
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**Figure 17: Monthly Kaua'i Hotel Performance, 2022 vs. 2021 vs. 2019**



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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 December 2022**

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$273.27	43.9%
2	New York, NY	\$215.16	71.9%
3	Miami, FL	\$182.55	23.1%
4	San Diego, CA	\$147.75	45.2%
5	Orange County, CA	\$143.68	46.9%

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

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$371.21	12.4%
2	New York, NY	\$287.67	36.4%
3	Miami, FL	\$253.11	14.0%
4	San Francisco/San Mateo, CA	\$212.04	37.8%
5	Boston, MA	\$211.84	35.2%

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

Rank	Destination	Occupancy	Percentage Pt. Change
1	New York, NY	74.8%	15.5%
2	Hawaiian Islands	73.6%	16.1%
3	Orlando, FL	72.8%	15.1%
4	San Diego, CA	72.6%	10.9%
5	Miami, FL	72.1%	5.3%

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

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$505.83	49.4%
2	Maui County	\$410.12	25.9%
3	Maldives	\$393.31	17.0%
4	Kaua'i	\$309.13	71.0%
5	Hawai'i Island	\$299.71	43.4%
6	Aruba	\$258.86	65.0%
7	Cabo San Lucas+	\$244.24	27.1%
8	O'ahu	\$201.79	61.3%
9	Puerto Rico	\$188.76	19.7%
10	Cancun+	\$171.14	48.6%
11	Fiji	\$137.84	518.4%
12	Costa Rica	\$125.04	63.8%
13	Puerto Vallarta+	\$95.33	60.4%
14	Phuket	\$58.48	254.6%
15	Bali	\$53.71	380.7%

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

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$721.77	0.8%
2	Maldives	\$607.85	6.5%
3	Maui County	\$606.92	12.3%
4	Hawai'i Island	\$400.10	15.8%
5	Kaua'i	\$398.08	26.1%
6	Cabo San Lucas+	\$394.45	3.3%
7	Aruba	\$384.23	25.5%
8	Puerto Rico	\$273.45	10.8%
9	O'ahu	\$267.77	18.9%
10	Cancun+	\$240.23	22.9%
11	Costa Rica	\$212.90	13.4%
12	Fiji	\$196.15	125.5%
13	Puerto Vallarta+	\$131.59	23.7%
14	Phuket	\$122.02	27.3%
15	Bali	\$109.86	68.1%

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

<b>Rank</b>	<b>Destination</b>	<b>Occupancy</b>	<b>Percentage Pt. Change</b>
1	Kaua'i	77.7%	20.4%
2	O'ahu	75.4%	19.8%
3	Hawai'i Island	74.9%	14.4%
4	Puerto Vallarta+	72.4%	16.5%
5	Cancun+	71.2%	12.3%
6	Fiji	70.3%	44.6%
7	French Polynesia	70.1%	22.8%
8	Puerto Rico	69.0%	5.2%
9	Maui County	67.6%	7.3%
10	Aruba	67.4%	16.1%
11	Maldives	64.7%	5.8%
12	Cabo San Lucas+	61.9%	11.6%
13	Costa Rica	58.7%	18.1%
14	Bali	48.9%	31.8%
15	Phuket	47.9%	30.7%

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