



## September 2022 Hawai'i Hotel Performance Report

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

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in September 2022 was \$248 (+47.5%), with ADR at \$337 (+10.8%) and occupancy of 73.5 percent (+18.3 percentage points) compared to September 2021 (Figure 1). Compared with September 2019, RevPAR was 27.6 percent higher, driven by higher ADR (+37.1%) which offset lower occupancy (-5.5 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 September, the survey included 146 properties representing 45,786 rooms, or 82.7 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 \$411.6 million (+48.3% vs. 2021, +32.3% vs. 2019) in September. Room demand was 1.2 million room nights (+33.9% vs. 2021, -3.5% vs. 2019) and room supply was 1.7 million room nights (+0.6% vs. 2021, +3.7% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$403 (+33.9% vs. 2021, +24.6% vs. 2019), with ADR at \$727 (+10.2% vs. 2021, +59.5% vs. 2019) and occupancy of 55.4 percent (+9.8 percentage points vs. 2021, -15.5 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$172 (+36.1% vs. 2021, +33.8% vs. 2019) with ADR at \$215 (-0.4% vs. 2021, +35.1% vs. 2019) and occupancy of 80.0 percent (+21.5 percentage points vs. 2021, -0.8 percentage points vs. 2019).

Maui County hotels led the counties in September and achieved RevPAR of \$350 (+21.3% vs. 2021, +51.7% vs. 2019), with ADR at \$536 (+10.1% vs. 2021, +69.6% vs. 2019) and occupancy of 65.4 percent (+6.0 percentage points vs. 2021, -7.7 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$446 (+21.7% vs. 2021, +17.5% vs. 2019), with ADR at \$835 (+21.0% vs. 2021, +81.2% vs. 2019) and occupancy of 53.5 percent (+0.3 percentage points vs. 2021, -29.0 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$332 (+28.4% vs. 2021, +67.3% vs. 2019), ADR at \$484 (+17.2% vs. 2021, +75.3% vs. 2019) and occupancy of 68.5 percent (+6.0 percentage points vs. 2021, -3.3 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$281 (+40.1% vs. 2021, +69.3% vs. 2019), with ADR at \$361 (+16.2% vs. 2021, +51.2% vs. 2019) and occupancy of 77.9 percent (+13.3 percentage points vs. 2021, +8.3 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$241 (+43.4% vs. 2021, +58.3% vs. 2019), with ADR at \$335 (+11.7% vs. 2021, +51.4% vs. 2019), and occupancy of 72.0 percent (+15.9 percentage points vs. 2021, +3.2 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$329 (+37.9% vs. 2021, +59.7% vs. 2019), with ADR at \$486 (+5.8% vs. 2021,

+57.4% vs. 2019), and occupancy of 67.6 percent (+15.7 percentage points vs. 2021, +1.0 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$199 (+81.1% vs. 2021, +3.7% vs. 2019) in September, ADR at \$260 (+22.3% vs. 2021, +14.8% vs. 2019) and occupancy of 76.7 percent (+24.9 percentage points vs. 2021, -8.2 percentage points vs. 2019). Waikiki hotels earned RevPAR of \$193 (+86.4% vs. 2021, +0.4% vs. 2019), with ADR at \$250 (+25.5% vs. 2021, +11.4% vs. 2019) and occupancy of 77.3 percent (+25.2 percentage points vs. 2021, -8.5 percentage points vs. 2019).

## YTD Q3 2022

During the first nine months of 2022, Hawai'i's hotels earned \$276 in RevPAR (+55.2% vs. 2021, +20.9% vs. 2019), with ADR at \$370 (+16.4% vs. 2021, +32.0% vs. 2019) and occupancy of 74.4 percent (+18.6 percentage points vs. 2021, -6.8 percentage points vs. 2019).

Total statewide hotel revenues for first nine months of 2022 were \$4.2 billion (+62.0% vs. 2021, +24.3% vs. 2019). Room supply was 15.2 million room nights (+4.3% vs. 2021, +2.8% vs. 2019), and room demand was 11.3 million room nights (+39.2% vs. 2021, -5.9% vs. 2019).

## Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest YTD Q3 2022 RevPAR at \$276 (+55.2%). New York, New York was second at \$193 (+91.9%), followed by Miami, Florida at \$186 (+30.9%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in YTD 2022 ADR at \$370 (+16.4%), followed by New York, New York at \$266 (+46.1%) and New Miami, Florida at \$256 (+19.3%) (Figure 20).

In the first nine months of 2022, the Hawaiian Islands topped the country in occupancy at 74.4 percent (+18.6 percentage points), followed by San Diego, California at 74.4 percent (+13.4 percentage points).<sup>1</sup> Miami and Orlando, Florida ranked third and fourth, respectively.<sup>2</sup>

## Comparison to International Markets

Hotels in French Polynesia ranked highest in YTD Q3 RevPAR for international "sun and sea" destinations at \$489 (+56.1%), followed by Maui County (\$418, +36.7%). Kaua'i (\$314, +94.5%), Hawai'i Island (\$302, +58.3%), and O'ahu (\$201, +70.9%) ranked fourth, fifth, and eighth, respectively (Figure 22).

Hotels in French Polynesia led in YTD Q3 ADR at \$718 (-0.4%), followed by Maui County (\$610, +17.2%). Kaua'i (\$400, +32.6%), Hawai'i Island (\$399, +21.2%), and O'ahu (\$265, +21.8%) ranked fourth, fifth, and ninth, respectively (Figure 23).

Kaua'i led in occupancy for "sun and sea" destinations at 78.5 percent (+25.0 percentage points), followed by O'ahu (76.1%, +21.9 percentage points) and Hawai'i Island (75.6%, +17.7 percentage points). Maui County ranked seventh (68.5%, +9.8 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/>

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<sup>1</sup> Hawaiian Islands occupancy was 74.42% and San Diego occupancy was 74.39%.

<sup>2</sup> Orlando occupancy was 72.61% and Orlando occupancy was 72.57%.

### **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 146 properties representing 45,786 rooms, or 82.7 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The September survey included 76 properties on O'ahu representing 28,071 rooms (92.6%); 37 properties in the County of Maui, representing 9,457 rooms (70.8%); 15 properties on the island of Hawai'i, representing 4,839 rooms (68.7%); and 18 properties on Kaua'i, representing 3,419 rooms (74.2%).

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

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

|                                     | Occupancy % |       |                       | Average Daily Rate |          |          | RevPAR   |          |          |
|-------------------------------------|-------------|-------|-----------------------|--------------------|----------|----------|----------|----------|----------|
|                                     | 2022        | 2021  | Percentage Pt. Change | 2022               | 2021     | % Change | 2022     | 2021     | % Change |
| <b>State of Hawai'i</b>             | 73.5%       | 55.2% | 18.3%                 | \$337.33           | \$304.42 | 10.8%    | \$247.86 | \$168.09 | 47.5%    |
| Luxury Class                        | 55.4%       | 45.6% | 9.8%                  | \$727.13           | \$659.90 | 10.2%    | \$402.60 | \$300.69 | 33.9%    |
| Upper Upscale Class                 | 77.2%       | 56.9% | 20.2%                 | \$325.51           | \$283.13 | 15.0%    | \$251.19 | \$161.18 | 55.8%    |
| Upscale Class                       | 76.6%       | 60.4% | 16.3%                 | \$250.62           | \$215.10 | 16.5%    | \$192.05 | \$129.83 | 47.9%    |
| Upper Midscale Class                | 75.1%       | 51.0% | 24.1%                 | \$224.72           | \$228.03 | -1.4%    | \$168.75 | \$116.37 | 45.0%    |
| Midscale & Economy Class            | 80.0%       | 58.5% | 21.5%                 | \$214.80           | \$215.67 | -0.4%    | \$171.84 | \$126.26 | 36.1%    |
| <b>O'ahu</b>                        | 76.7%       | 51.8% | 24.9%                 | \$259.81           | \$212.45 | 22.3%    | \$199.35 | \$110.06 | 81.1%    |
| Waikiki                             | 77.3%       | 52.0% | 25.2%                 | \$249.65           | \$198.90 | 25.5%    | \$192.96 | \$103.51 | 86.4%    |
| Other O'ahu                         | 73.6%       | 50.5% | 23.1%                 | \$319.20           | \$289.74 | 10.2%    | \$234.96 | \$146.32 | 60.6%    |
| O'ahu Luxury                        | 57.4%       | 35.1% | 22.3%                 | \$591.74           | \$519.30 | 13.9%    | \$339.78 | \$182.35 | 86.3%    |
| O'ahu Upper Upscale                 | 78.9%       | 53.4% | 25.6%                 | \$268.97           | \$224.96 | 19.6%    | \$212.35 | \$120.10 | 76.8%    |
| O'ahu Upscale                       | 81.9%       | 59.6% | 22.3%                 | \$206.37           | \$172.75 | 19.5%    | \$169.00 | \$102.91 | 64.2%    |
| O'ahu Upper Midscale                | 73.9%       | 44.8% | 29.1%                 | \$169.92           | \$135.95 | 25.0%    | \$125.50 | \$60.88  | 106.1%   |
| O'ahu Midscale & Economy            | 79.5%       | 53.7% | 25.9%                 | \$160.88           | \$128.79 | 24.9%    | \$127.91 | \$69.10  | 85.1%    |
| <b>Maui County</b>                  | 65.4%       | 59.3% | 6.0%                  | \$535.82           | \$486.72 | 10.1%    | \$350.17 | \$288.66 | 21.3%    |
| Wailea                              | 53.5%       | 53.1% | 0.3%                  | \$834.72           | \$689.77 | 21.0%    | \$446.25 | \$366.56 | 21.7%    |
| Lahaina/Kā'anapali/Kapalua          | 68.5%       | 62.6% | 6.0%                  | \$483.96           | \$412.86 | 17.2%    | \$331.65 | \$258.30 | 28.4%    |
| Other Maui County                   | 61.6%       | 55.5% | 6.1%                  | \$603.84           | \$585.12 | 3.2%     | \$371.99 | \$324.53 | 14.6%    |
| Maui County Luxury                  | 46.3%       | 47.0% | -0.7%                 | \$960.19           | \$786.30 | 22.1%    | \$444.58 | \$369.48 | 20.3%    |
| Maui County Upper Upscale & Upscale | 71.6%       | 65.0% | 6.6%                  | \$455.24           | \$383.67 | 18.7%    | \$325.77 | \$249.38 | 30.6%    |
| <b>Island of Hawai'i</b>            | 72.0%       | 56.1% | 15.9%                 | \$334.80           | \$299.62 | 11.7%    | \$241.07 | \$168.12 | 43.4%    |
| Kohala Coast                        | 67.6%       | 51.9% | 15.7%                 | \$486.31           | \$459.45 | 5.8%     | \$328.71 | \$238.38 | 37.9%    |
| <b>Kaua'i</b>                       | 77.9%       | 64.6% | 13.3%                 | \$360.59           | \$310.26 | 16.2%    | \$280.88 | \$200.42 | 40.1%    |

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 September 2022**

|                            | Supply (thousands) |         |          | Demand (thousands) |       |          | Revenue (millions) |       |          |
|----------------------------|--------------------|---------|----------|--------------------|-------|----------|--------------------|-------|----------|
|                            | 2022               | 2021    | % Change | 2022               | 2021  | % Change | 2022               | 2021  | % Change |
| <b>State of Hawai'i</b>    | 1,660.5            | 1,650.7 | 0.6%     | 1,220.1            | 911.5 | 33.9%    | 411.6              | 277.5 | 48.3%    |
| <b>O'ahu</b>               | 909.9              | 904.9   | 0.6%     | 698.2              | 468.8 | 48.9%    | 181.4              | 99.6  | 82.1%    |
| Waikiki                    | 771.4              | 766.4   | 0.6%     | 596.2              | 398.9 | 49.5%    | 148.8              | 79.3  | 87.6%    |
| <b>Maui County</b>         | 400.9              | 399.3   | 0.4%     | 262.0              | 236.8 | 10.6%    | 140.4              | 115.3 | 21.8%    |
| Wailea                     | 87.5               | 87.7    | -0.2%    | 46.8               | 46.6  | 0.4%     | 39.0               | 32.1  | 21.5%    |
| Lahaina/Kā'anapali/Kapalua | 216.9              | 216.2   | 0.3%     | 148.6              | 135.3 | 9.9%     | 71.9               | 55.9  | 28.8%    |
| <b>Island of Hawai'i</b>   | 211.4              | 211.7   | -0.1%    | 152.2              | 118.8 | 28.2%    | 51.0               | 35.6  | 43.2%    |
| Kohala Coast               | 89.3               | 88.7    | 0.6%     | 60.3               | 46.0  | 31.1%    | 29.3               | 21.2  | 38.7%    |
| <b>Kaua'i</b>              | 138.3              | 134.8   | 2.6%     | 107.7              | 87.1  | 23.7%    | 38.8               | 27.0  | 43.8%    |

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

**Figure 3: Hawai'i Hotel Performance September 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>             | 73.5%       | 78.9% | -5.5%                 | \$337.33           | \$246.00 | 37.1%    | \$247.86 | \$194.20 | 27.6%    |
| Luxury Class                        | 55.4%       | 70.9% | -15.5%                | \$727.13           | \$456.01 | 59.5%    | \$402.60 | \$323.13 | 24.6%    |
| Upper Upscale Class                 | 77.2%       | 80.0% | -2.8%                 | \$325.51           | \$251.66 | 29.3%    | \$251.19 | \$201.29 | 24.8%    |
| Upscale Class                       | 76.6%       | 79.5% | -2.9%                 | \$250.62           | \$191.96 | 30.6%    | \$192.05 | \$152.66 | 25.8%    |
| Upper Midscale Class                | 75.1%       | 83.3% | -8.2%                 | \$224.72           | \$156.24 | 43.8%    | \$168.75 | \$130.15 | 29.7%    |
| Midscale & Economy Class            | 80.0%       | 80.8% | -0.8%                 | \$214.80           | \$158.95 | 35.1%    | \$171.84 | \$128.40 | 33.8%    |
| <b>O'ahu</b>                        | 76.7%       | 84.9% | -8.2%                 | \$259.81           | \$226.26 | 14.8%    | \$199.35 | \$192.15 | 3.7%     |
| Waikiki                             | 77.3%       | 85.7% | -8.5%                 | \$249.65           | \$224.05 | 11.4%    | \$192.96 | \$192.11 | 0.4%     |
| Other O'ahu                         | 73.6%       | 80.0% | -6.4%                 | \$319.20           | \$240.61 | 32.7%    | \$234.96 | \$192.39 | 22.1%    |
| O'ahu Luxury                        | 57.4%       | 74.2% | -16.8%                | \$591.74           | \$450.07 | 31.5%    | \$339.78 | \$333.99 | 1.7%     |
| O'ahu Upper Upscale                 | 78.9%       | 85.7% | -6.8%                 | \$268.97           | \$246.01 | 9.3%     | \$212.35 | \$210.91 | 0.7%     |
| O'ahu Upscale                       | 81.9%       | 88.0% | -6.1%                 | \$206.37           | \$192.64 | 7.1%     | \$169.00 | \$169.53 | -0.3%    |
| O'ahu Upper Midscale                | 73.9%       | 83.9% | -10.0%                | \$169.92           | \$153.33 | 10.8%    | \$125.50 | \$128.61 | -2.4%    |
| O'ahu Midscale & Economy            | 79.5%       | 88.5% | -9.0%                 | \$160.88           | \$131.31 | 22.5%    | \$127.91 | \$116.23 | 10.0%    |
| <b>Maui County</b>                  | 65.4%       | 73.1% | -7.7%                 | \$535.82           | \$316.01 | 69.6%    | \$350.17 | \$230.88 | 51.7%    |
| Wailea                              | 53.5%       | 82.4% | -29.0%                | \$834.72           | \$460.63 | 81.2%    | \$446.25 | \$379.64 | 17.5%    |
| Lahaina/Kā'anapali/Kapalua          | 68.5%       | 71.8% | -3.3%                 | \$483.96           | \$276.04 | 75.3%    | \$331.65 | \$198.29 | 67.3%    |
| Other Maui County                   | 61.6%       | 74.6% | -13.0%                | \$603.84           | \$364.45 | 65.7%    | \$371.99 | \$271.90 | 36.8%    |
| Maui County Luxury                  | 46.3%       | 73.8% | -27.5%                | \$960.19           | \$483.79 | 98.5%    | \$444.58 | \$357.22 | 24.5%    |
| Maui County Upper Upscale & Upscale | 71.6%       | 73.2% | -1.6%                 | \$455.24           | \$261.97 | 73.8%    | \$325.77 | \$191.64 | 70.0%    |
| <b>Island of Hawai'i</b>            | 72.0%       | 68.8% | 3.2%                  | \$334.80           | \$221.21 | 51.4%    | \$241.07 | \$152.25 | 58.3%    |
| Kohala Coast                        | 67.6%       | 66.6% | 1.0%                  | \$486.31           | \$309.06 | 57.4%    | \$328.71 | \$205.89 | 59.7%    |
| <b>Kaua'i</b>                       | 77.9%       | 69.6% | 8.3%                  | \$360.59           | \$238.41 | 51.2%    | \$280.88 | \$165.86 | 69.3%    |

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 September 2022 vs. 2019**

|                            | Supply (thousands) |         |          | Demand (thousands) |         |          | Revenue (millions) |       |          |
|----------------------------|--------------------|---------|----------|--------------------|---------|----------|--------------------|-------|----------|
|                            | 2022               | 2019    | % Change | 2022               | 2019    | % Change | 2022               | 2019  | % Change |
| <b>State of Hawai'i</b>    | 1,660.5            | 1,601.4 | 3.7%     | 1,220.1            | 1,264.2 | -3.5%    | 411.6              | 311.0 | 32.3%    |
| <b>O'ahu</b>               | 909.9              | 902.1   | 0.9%     | 698.2              | 766.1   | -8.9%    | 181.4              | 173.3 | 4.6%     |
| Waikiki                    | 771.4              | 774.2   | -0.4%    | 596.2              | 663.8   | -10.2%   | 148.8              | 148.7 | 0.1%     |
| <b>Maui County</b>         | 400.9              | 373.3   | 7.4%     | 262.0              | 272.7   | -3.9%    | 140.4              | 86.2  | 62.9%    |
| Wailea                     | 87.5               | 65.8    | 32.9%    | 46.8               | 54.2    | -13.8%   | 39.0               | 25.0  | 56.2%    |
| Lahaina/Kā'anapali/Kapalua | 216.9              | 208.0   | 4.3%     | 148.6              | 149.4   | -0.5%    | 71.9               | 41.2  | 74.4%    |
| <b>Island of Hawai'i</b>   | 211.4              | 191.2   | 10.6%    | 152.2              | 131.6   | 15.7%    | 51.0               | 29.1  | 75.1%    |
| Kohala Coast               | 89.3               | 88.2    | 1.2%     | 60.3               | 58.8    | 2.7%     | 29.3               | 18.2  | 61.6%    |
| <b>Kaua'i</b>              | 138.3              | 134.8   | 2.6%     | 107.7              | 93.8    | 14.9%    | 38.8               | 22.4  | 73.7%    |

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

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

|                                     | Occupancy % |       |                       | Average Daily Rate |          |          | RevPAR   |          |          |
|-------------------------------------|-------------|-------|-----------------------|--------------------|----------|----------|----------|----------|----------|
|                                     | 2022        | 2021  | Percentage Pt. Change | 2022               | 2021     | % Change | 2022     | 2021     | % Change |
| <b>State of Hawai'i</b>             | 74.4%       | 55.8% | 18.6%                 | \$370.27           | \$318.17 | 16.4%    | \$275.57 | \$177.51 | 55.2%    |
| Luxury Class                        | 59.5%       | 49.7% | 9.9%                  | \$844.72           | \$751.43 | 12.4%    | \$502.88 | \$373.14 | 34.8%    |
| Upper Upscale Class                 | 77.5%       | 55.8% | 21.7%                 | \$346.97           | \$294.54 | 17.8%    | \$269.05 | \$164.44 | 63.6%    |
| Upscale Class                       | 77.8%       | 58.8% | 19.0%                 | \$262.67           | \$212.63 | 23.5%    | \$204.32 | \$125.01 | 63.4%    |
| Upper Midscale Class                | 73.6%       | 55.7% | 17.9%                 | \$237.20           | \$213.42 | 11.1%    | \$174.59 | \$118.87 | 46.9%    |
| Midscale & Economy Class            | 81.0%       | 59.6% | 21.3%                 | \$224.75           | \$197.52 | 13.8%    | \$182.01 | \$117.79 | 54.5%    |
| <b>O'ahu</b>                        | 76.1%       | 54.3% | 21.9%                 | \$264.58           | \$217.16 | 21.8%    | \$201.37 | \$117.82 | 70.9%    |
| Waikiki                             | 76.5%       | 53.8% | 22.7%                 | \$250.81           | \$205.44 | 22.1%    | \$191.98 | \$110.60 | 73.6%    |
| Other O'ahu                         | 73.7%       | 56.8% | 16.9%                 | \$344.87           | \$284.89 | 21.1%    | \$254.09 | \$161.88 | 57.0%    |
| O'ahu Luxury                        | 55.1%       | 42.4% | 12.7%                 | \$645.37           | \$568.13 | 13.6%    | \$355.56 | \$241.03 | 47.5%    |
| O'ahu Upper Upscale                 | 78.2%       | 52.6% | 25.6%                 | \$272.39           | \$232.90 | 17.0%    | \$213.13 | \$122.52 | 74.0%    |
| O'ahu Upscale                       | 82.7%       | 61.4% | 21.3%                 | \$209.99           | \$173.42 | 21.1%    | \$173.65 | \$106.53 | 63.0%    |
| O'ahu Upper Midscale                | 72.0%       | 52.3% | 19.7%                 | \$169.13           | \$139.84 | 20.9%    | \$121.75 | \$73.17  | 66.4%    |
| O'ahu Midscale & Economy            | 80.9%       | 62.1% | 18.8%                 | \$161.68           | \$130.90 | 23.5%    | \$130.78 | \$81.23  | 61.0%    |
| <b>Maui County</b>                  | 68.5%       | 58.8% | 9.8%                  | \$610.26           | \$520.75 | 17.2%    | \$418.20 | \$306.00 | 36.7%    |
| Wailea                              | 62.1%       | 54.7% | 7.4%                  | \$957.20           | \$811.17 | 18.0%    | \$593.97 | \$443.35 | 34.0%    |
| Lahaina/Kā'anapali/Kapalua          | 70.7%       | 59.7% | 11.0%                 | \$541.08           | \$437.75 | 23.6%    | \$382.40 | \$261.13 | 46.4%    |
| Other Maui County                   | 66.0%       | 57.7% | 8.3%                  | \$697.21           | \$622.54 | 12.0%    | \$460.24 | \$359.23 | 28.1%    |
| Maui County Luxury                  | 55.6%       | 50.8% | 4.8%                  | \$1,065.69         | \$896.06 | 18.9%    | \$592.76 | \$455.50 | 30.1%    |
| Maui County Upper Upscale & Upscale | 73.4%       | 61.8% | 11.6%                 | \$498.41           | \$399.37 | 24.8%    | \$365.62 | \$246.83 | 48.1%    |
| <b>Island of Hawai'i</b>            | 75.6%       | 57.9% | 17.7%                 | \$399.03           | \$329.15 | 21.2%    | \$301.84 | \$190.64 | 58.3%    |
| Kohala Coast                        | 72.2%       | 59.5% | 12.7%                 | \$621.11           | \$500.69 | 24.1%    | \$448.25 | \$297.69 | 50.6%    |
| <b>Kaua'i</b>                       | 78.5%       | 53.5% | 25.0%                 | \$400.46           | \$301.91 | 32.6%    | \$314.27 | \$161.55 | 94.5%    |

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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 6: Hawai'i Hotel Performance by Measure Year-to-Date September 2022**

|                            | Supply (thousands) |          |          | Demand (thousands) |         |          | Revenue (millions) |         |          |
|----------------------------|--------------------|----------|----------|--------------------|---------|----------|--------------------|---------|----------|
|                            | 2022               | 2021     | % Change | 2022               | 2021    | % Change | 2022               | 2021    | % Change |
| <b>State of Hawai'i</b>    | 15,152.0           | 14,523.4 | 4.3%     | 11,276.7           | 8,102.8 | 39.2%    | 4,175.4            | 2,578.1 | 62.0%    |
| <b>O'ahu</b>               | 8,334.6            | 7,875.8  | 5.8%     | 6,343.4            | 4,273.0 | 48.5%    | 1,678.3            | 927.9   | 80.9%    |
| Waikiki                    | 7,074.2            | 6,767.0  | 4.5%     | 5,414.7            | 3,642.9 | 48.6%    | 1,358.1            | 748.4   | 81.5%    |
| <b>Maui County</b>         | 3,641.4            | 3,609.2  | 0.9%     | 2,495.4            | 2,120.8 | 17.7%    | 1,522.9            | 1,104.4 | 37.9%    |
| Wailea                     | 797.3              | 782.0    | 2.0%     | 494.8              | 427.4   | 15.8%    | 473.6              | 346.7   | 36.6%    |
| Lahaina/Kā'anapali/Kapalua | 1,966.5            | 1,958.4  | 0.4%     | 1,389.8            | 1,168.3 | 19.0%    | 752.0              | 511.4   | 47.0%    |
| <b>Island of Hawai'i</b>   | 1,921.5            | 1,887.8  | 1.8%     | 1,453.5            | 1,093.4 | 32.9%    | 580.0              | 359.9   | 61.2%    |
| Kohala Coast               | 809.7              | 807.2    | 0.3%     | 584.4              | 479.9   | 21.8%    | 363.0              | 240.3   | 51.1%    |
| <b>Kaua'i</b>              | 1,254.4            | 1,150.6  | 9.0%     | 984.4              | 615.7   | 59.9%    | 394.2              | 185.9   | 112.1%   |

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**Figure 7: Hawai'i Hotel Performance Year-to-Date September 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>             | 74.4%       | 81.3% | -6.8%                 | \$370.27           | \$280.51 | 32.0%    | \$275.57 | \$227.96 | 20.9%    |
| Luxury Class                        | 59.5%       | 77.0% | -17.5%                | \$844.72           | \$558.51 | 51.2%    | \$502.88 | \$430.19 | 16.9%    |
| Upper Upscale Class                 | 77.5%       | 83.2% | -5.6%                 | \$346.97           | \$280.22 | 23.8%    | \$269.05 | \$233.09 | 15.4%    |
| Upscale Class                       | 77.8%       | 78.7% | -0.9%                 | \$262.67           | \$209.10 | 25.6%    | \$204.32 | \$164.52 | 24.2%    |
| Upper Midscale Class                | 73.6%       | 84.3% | -10.7%                | \$237.20           | \$163.62 | 45.0%    | \$174.59 | \$137.93 | 26.6%    |
| Midscale & Economy Class            | 81.0%       | 82.5% | -1.5%                 | \$224.75           | \$173.54 | 29.5%    | \$182.01 | \$143.18 | 27.1%    |
| <b>O'ahu</b>                        | 76.1%       | 84.6% | -8.5%                 | \$264.58           | \$238.47 | 11.0%    | \$201.37 | \$201.83 | -0.2%    |
| Waikiki                             | 76.5%       | 84.9% | -8.4%                 | \$250.81           | \$233.38 | 7.5%     | \$191.98 | \$198.14 | -3.1%    |
| Other O'ahu                         | 73.7%       | 83.0% | -9.4%                 | \$344.87           | \$270.05 | 27.7%    | \$254.09 | \$224.26 | 13.3%    |
| O'ahu Luxury                        | 55.1%       | 74.2% | -19.1%                | \$645.37           | \$491.56 | 31.3%    | \$355.56 | \$364.53 | -2.5%    |
| O'ahu Upper Upscale                 | 78.2%       | 86.0% | -7.7%                 | \$272.39           | \$262.05 | 3.9%     | \$213.13 | \$225.35 | -5.4%    |
| O'ahu Upscale                       | 82.7%       | 85.2% | -2.5%                 | \$209.99           | \$195.73 | 7.3%     | \$173.65 | \$166.81 | 4.1%     |
| O'ahu Upper Midscale                | 72.0%       | 84.7% | -12.7%                | \$169.13           | \$157.86 | 7.1%     | \$121.75 | \$133.74 | -9.0%    |
| O'ahu Midscale & Economy            | 80.9%       | 87.9% | -7.0%                 | \$161.68           | \$133.34 | 21.3%    | \$130.78 | \$117.21 | 11.6%    |
| <b>Maui County</b>                  | 68.5%       | 78.3% | -9.8%                 | \$610.26           | \$396.82 | 53.8%    | \$418.20 | \$310.83 | 34.5%    |
| Wailea                              | 62.1%       | 89.2% | -27.2%                | \$957.20           | \$609.03 | 57.2%    | \$593.97 | \$543.50 | 9.3%     |
| Lahaina/Kā'anapali/Kapalua          | 70.7%       | 77.5% | -6.8%                 | \$541.08           | \$334.07 | 62.0%    | \$382.40 | \$258.94 | 47.7%    |
| Other Maui County                   | 66.0%       | 79.4% | -13.4%                | \$697.21           | \$475.11 | 46.7%    | \$460.24 | \$377.12 | 22.0%    |
| Maui County Luxury                  | 55.6%       | 81.1% | -25.5%                | \$1,065.69         | \$645.42 | 65.1%    | \$592.76 | \$523.71 | 13.2%    |
| Maui County Upper Upscale & Upscale | 73.4%       | 78.2% | -4.8%                 | \$498.41           | \$315.58 | 57.9%    | \$365.62 | \$246.75 | 48.2%    |
| <b>Island of Hawai'i</b>            | 75.6%       | 77.2% | -1.6%                 | \$399.03           | \$263.49 | 51.4%    | \$301.84 | \$203.53 | 48.3%    |
| Kohala Coast                        | 72.2%       | 78.0% | -5.9%                 | \$621.11           | \$374.16 | 66.0%    | \$448.25 | \$292.00 | 53.5%    |
| <b>Kaua'i</b>                       | 78.5%       | 72.7% | 5.8%                  | \$400.46           | \$283.14 | 41.4%    | \$314.27 | \$205.75 | 52.7%    |

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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.

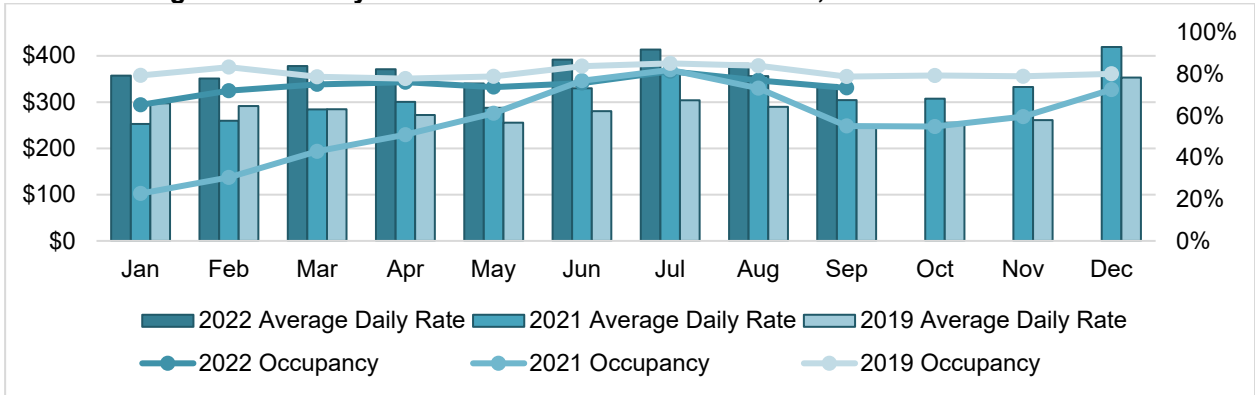
**Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date September 2022 vs. 2019**

|                            | Supply (thousands) |          |          | Demand (thousands) |          |          | Revenue (millions) |         |          |
|----------------------------|--------------------|----------|----------|--------------------|----------|----------|--------------------|---------|----------|
|                            | 2022               | 2019     | % Change | 2022               | 2019     | % Change | 2022               | 2019    | % Change |
| <b>State of Hawai'i</b>    | 15,152.0           | 14,741.0 | 2.8%     | 11,276.7           | 11,979.5 | -5.9%    | 4,175.4            | 3,360.4 | 24.3%    |
| <b>O'ahu</b>               | 8,334.6            | 8,277.7  | 0.7%     | 6,343.4            | 7,006.1  | -9.5%    | 1,678.3            | 1,670.7 | 0.5%     |
| Waikiki                    | 7,074.2            | 7,107.0  | -0.5%    | 5,414.7            | 6,033.9  | -10.3%   | 1,358.1            | 1,408.2 | -3.6%    |
| <b>Maui County</b>         | 3,641.4            | 3,461.8  | 5.2%     | 2,495.4            | 2,711.6  | -8.0%    | 1,522.9            | 1,076.0 | 41.5%    |
| Wailea                     | 797.3              | 599.0    | 33.1%    | 494.8              | 534.5    | -7.4%    | 473.6              | 325.5   | 45.5%    |
| Lahaina/Kā'anapali/Kapalua | 1,966.5            | 1,941.8  | 1.3%     | 1,389.8            | 1,505.1  | -7.7%    | 752.0              | 502.8   | 49.6%    |
| <b>Island of Hawai'i</b>   | 1,921.5            | 1,764.1  | 8.9%     | 1,453.5            | 1,362.7  | 6.7%     | 580.0              | 359.1   | 61.5%    |
| Kohala Coast               | 809.7              | 817.2    | -0.9%    | 584.4              | 637.7    | -8.4%    | 363.0              | 238.6   | 52.1%    |
| <b>Kaua'i</b>              | 1,254.4            | 1,237.4  | 1.4%     | 984.4              | 899.2    | 9.5%     | 394.2              | 254.6   | 54.8%    |

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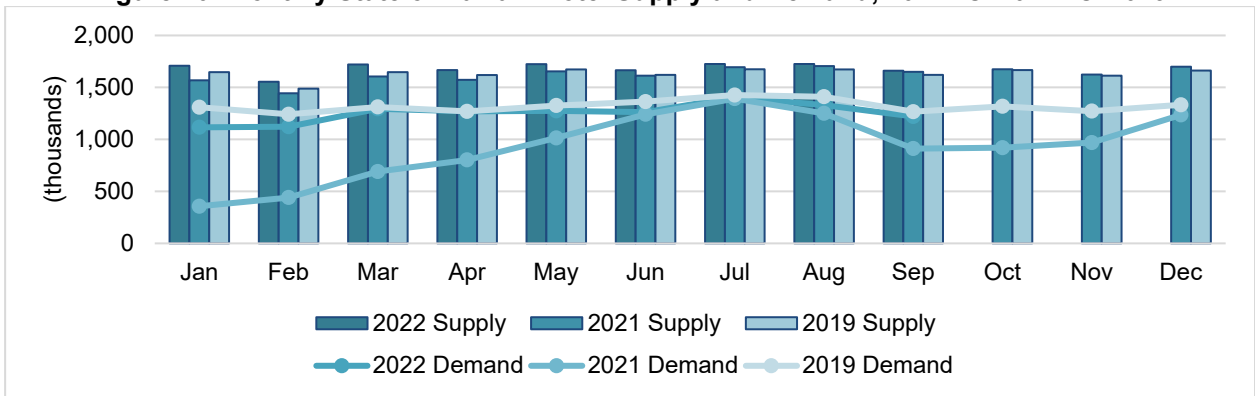


**Figure 9: Monthly State of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



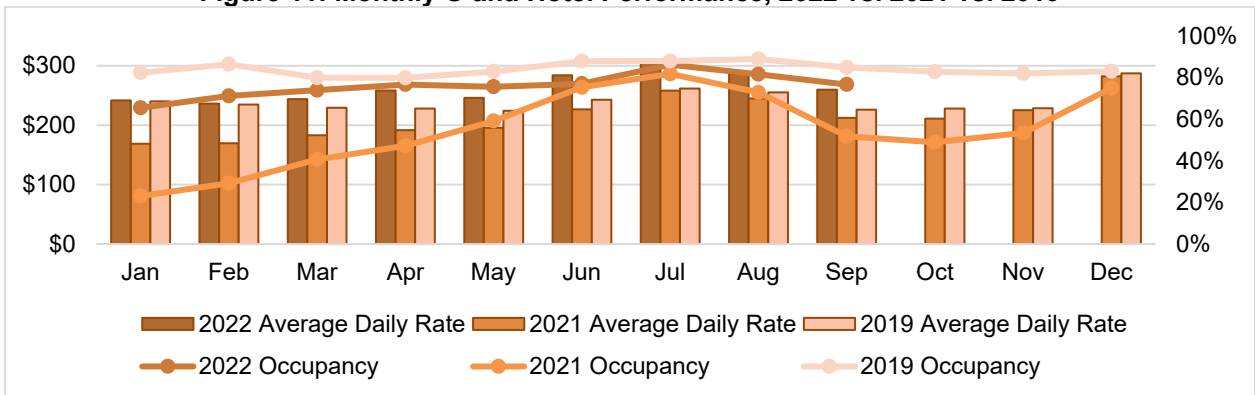
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**Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



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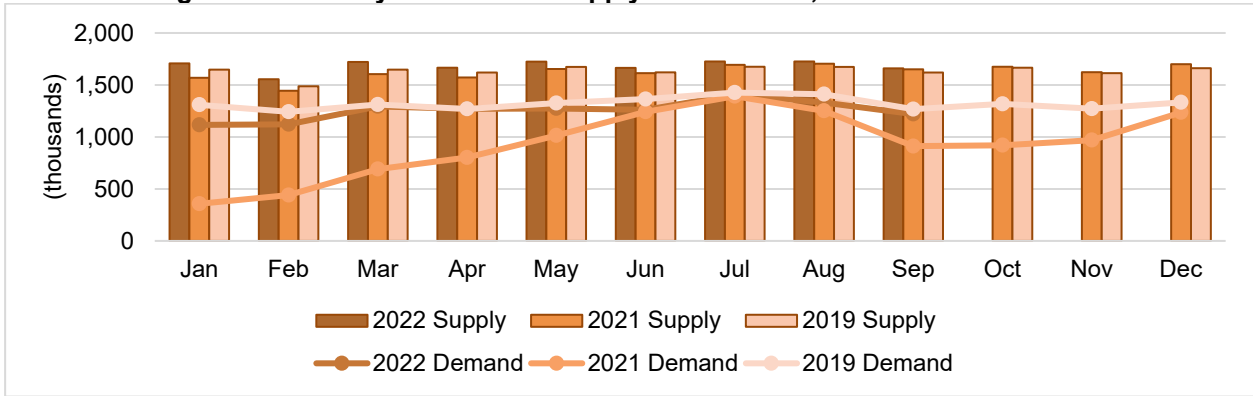
**Figure 11: Monthly O'ahu Hotel Performance, 2022 vs. 2021 vs. 2019**



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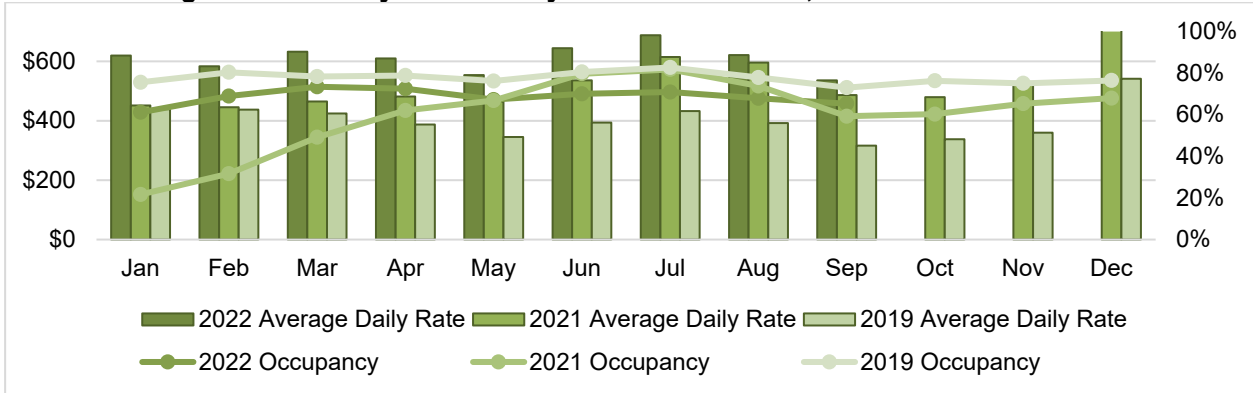


**Figure 12: Monthly O'ahu Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



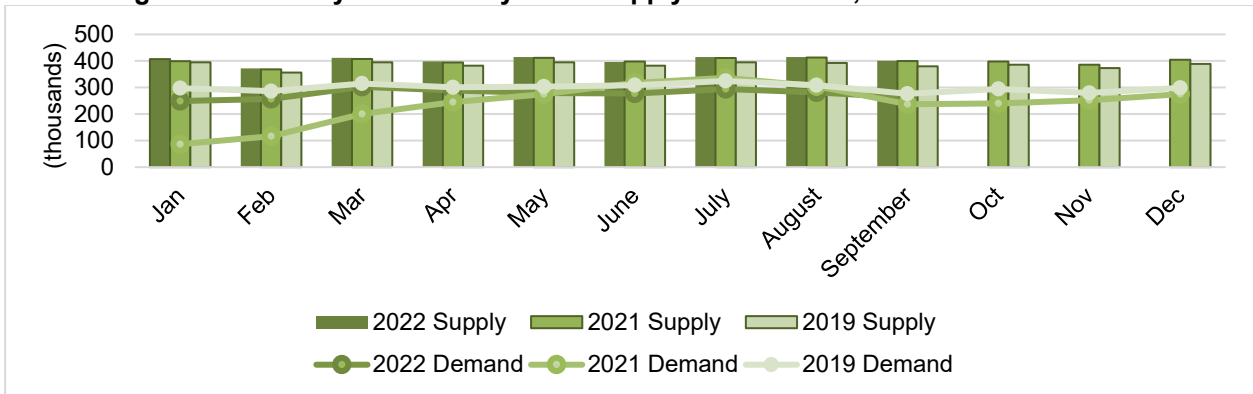
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**Figure 13: Monthly Maui County Hotel Performance, 2022 vs. 2021 vs. 2019**



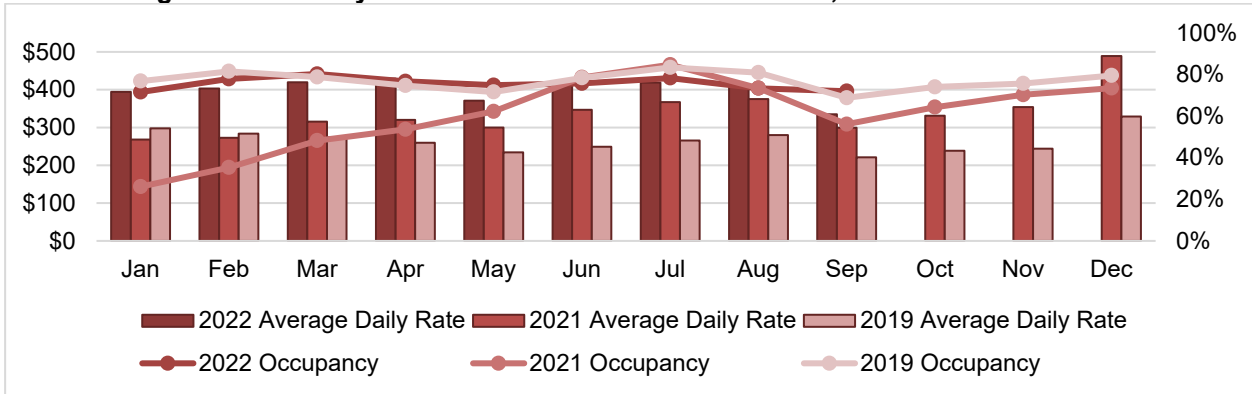
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**Figure 14: Monthly Maui County Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



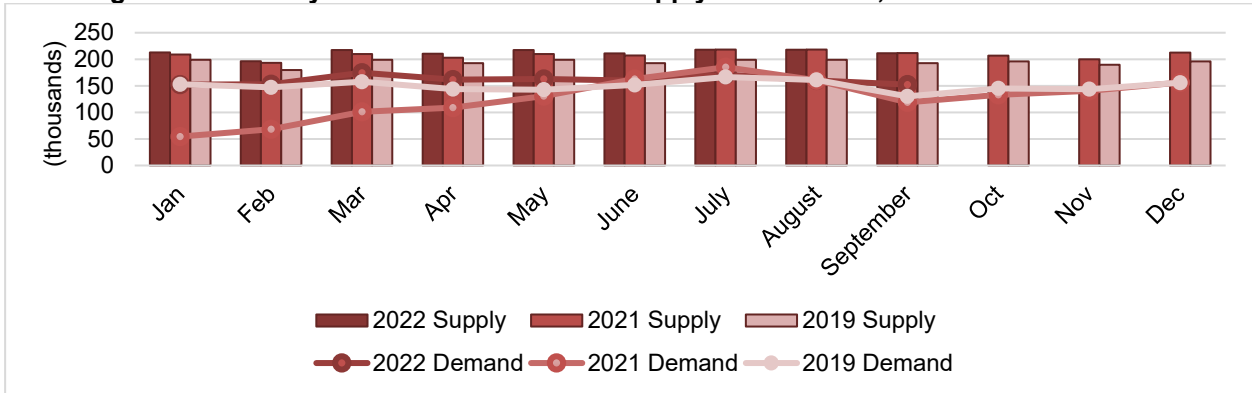
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**Figure 15: Monthly Island of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



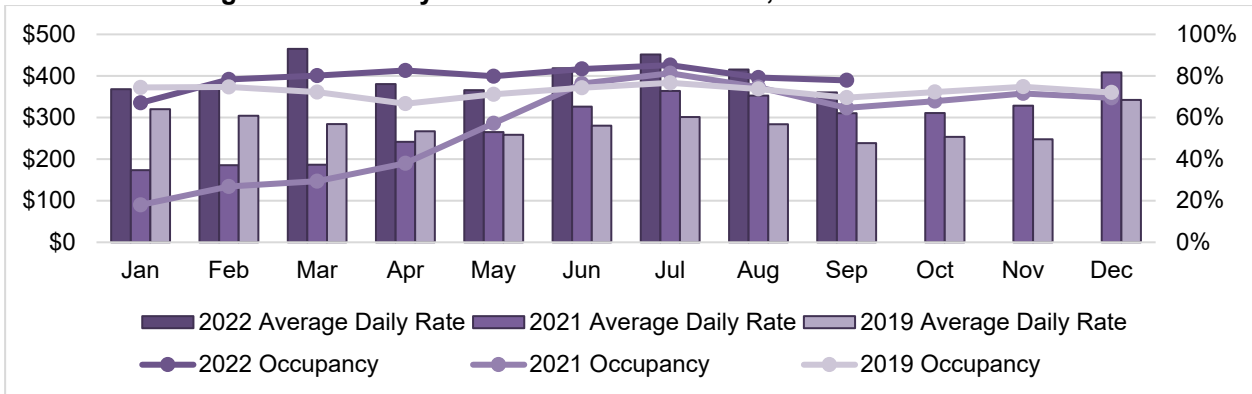
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**Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



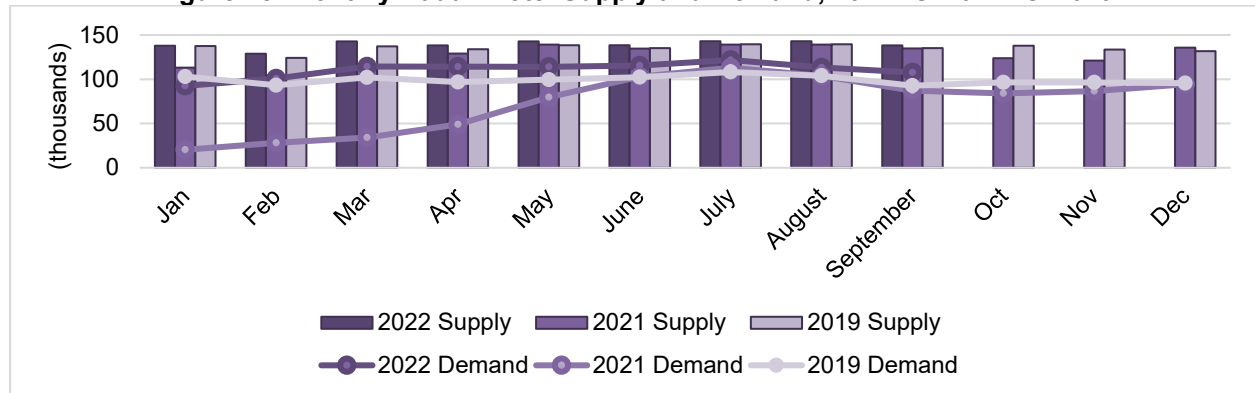
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**Figure 17: Monthly Kaua'i Hotel Performance, 2022 vs. 2021 vs. 2019**



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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 September 2022**

| Rank | Destination      | Revenue Per Available Room | % Change |
|------|------------------|----------------------------|----------|
| 1    | Hawaiian Islands | \$275.57                   | 55.2%    |
| 2    | New York, NY     | \$192.78                   | 91.9%    |
| 3    | Miami, FL        | \$185.66                   | 30.9%    |
| 4    | San Diego, CA    | \$154.18                   | 53.4%    |
| 5    | Los Angeles, CA  | \$145.06                   | 49.9%    |

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

| Rank | Destination                 | Average Daily Rate | % Change |
|------|-----------------------------|--------------------|----------|
| 1    | Hawaiian Islands            | \$370.27           | 16.4%    |
| 2    | New York, NY                | \$266.29           | 46.1%    |
| 3    | Miami, FL                   | \$255.69           | 19.3%    |
| 4    | San Francisco/San Mateo, CA | \$213.33           | 44.7%    |
| 5    | Boston, MA                  | \$210.74           | 43.3%    |

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

| Rank | Destination      | Occupancy | Percentage Pt. Change |
|------|------------------|-----------|-----------------------|
| 1    | Hawaiian Islands | 74.4%     | 18.6%                 |
| 2    | San Diego, CA    | 74.4%     | 13.4%                 |
| 3    | Miami, FL        | 72.6%     | 6.5%                  |
| 4    | Orlando, FL      | 72.6%     | 17.0%                 |
| 5    | New York, NY     | 72.4%     | 17.3%                 |

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

| Rank | Destination      | Revenue Per Available Room | % Change |
|------|------------------|----------------------------|----------|
| 1    | French Polynesia | \$488.57                   | 56.1%    |
| 2    | Maui County      | \$418.20                   | 36.7%    |
| 3    | Maldives         | \$382.68                   | 26.9%    |
| 4    | Kaua'i           | \$314.27                   | 94.5%    |
| 5    | Hawai'i Island   | \$301.84                   | 58.3%    |
| 6    | Aruba            | \$243.53                   | 69.9%    |
| 7    | Cabo San Lucas+  | \$237.41                   | 35.7%    |
| 8    | O'ahu            | \$201.37                   | 70.9%    |
| 9    | Puerto Rico      | \$190.51                   | 22.8%    |
| 10   | Cancun+          | \$173.21                   | 63.1%    |
| 11   | Fiji             | \$131.41                   | 832.1%   |
| 12   | Costa Rica       | \$121.80                   | 82.8%    |
| 13   | Puerto Vallarta+ | \$91.63                    | 67.0%    |
| 14   | Phuket           | \$46.07                    | 391.2%   |
| 15   | Bali             | \$44.25                    | 497.6%   |

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

| Rank | Destination      | Average Daily Rate | % Change |
|------|------------------|--------------------|----------|
| 1    | French Polynesia | \$717.56           | -0.4%    |
| 2    | Maui County      | \$610.26           | 17.2%    |
| 3    | Maldives         | \$595.55           | 7.4%     |
| 4    | Kaua'i           | \$400.46           | 32.6%    |
| 5    | Hawai'i Island   | \$399.03           | 21.2%    |
| 6    | Cabo San Lucas+  | \$390.00           | 3.5%     |
| 7    | Aruba            | \$372.26           | 27.0%    |
| 8    | Puerto Rico      | \$273.03           | 12.0%    |
| 9    | O'ahu            | \$264.58           | 21.8%    |
| 10   | Cancun+          | \$241.78           | 26.8%    |
| 11   | Costa Rica       | \$206.65           | 16.5%    |
| 12   | Fiji             | \$193.57           | 225.9%   |
| 13   | Puerto Vallarta+ | \$127.49           | 22.1%    |
| 14   | Phuket           | \$110.42           | 37.3%    |
| 15   | Bali             | \$102.02           | 66.6%    |

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

| <b>Rank</b> | <b>Destination</b> | <b>Occupancy</b> | <b>Percentage Pt. Change</b> |
|-------------|--------------------|------------------|------------------------------|
| 1           | Kaua'i             | 78.5%            | 25.0%                        |
| 2           | O'ahu              | 76.1%            | 21.9%                        |
| 3           | Hawai'i Island     | 75.6%            | 17.7%                        |
| 4           | Puerto Vallarta+   | 71.9%            | 19.3%                        |
| 5           | Cancun+            | 71.6%            | 16.0%                        |
| 6           | Puerto Rico        | 69.8%            | 6.1%                         |
| 7           | Maui County        | 68.5%            | 9.8%                         |
| 8           | French Polynesia   | 68.1%            | 24.6%                        |
| 9           | Fiji               | 67.9%            | 44.2%                        |
| 10          | Aruba              | 65.4%            | 16.5%                        |
| 11          | Maldives           | 64.3%            | 9.9%                         |
| 12          | Cabo San Lucas+    | 60.9%            | 14.4%                        |
| 13          | Costa Rica         | 58.9%            | 21.4%                        |
| 14          | Bali               | 43.4%            | 31.3%                        |
| 15          | Phuket             | 41.7%            | 30.1%                        |

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