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Hawai'i Hotel RevPAR Up 7.6% in December 2021 Compared to December 2019 Driven by Higher ADR; Hawai'i Led the Nation in 2021 RevPAR and ADR

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

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in December 2021 was \$305 (+341.9%), with ADR at \$419 (+44.2%) and occupancy of 72.7 percent (+49.0 percentage points) compared to December 2020 (Figure 1). Compared with December 2019, RevPAR was 7.6 percent higher, driven by higher ADR (+18.8%) which offset lower occupancy (-7.5 percentage points) (Figure 5).

"Hawai'i's hotels continued their upward momentum in December, with strong RevPAR and ADR helping to end the year on a high note and sustain employment across the islands," said John De Fries, HTA president and CEO. "Domestic leisure market demand remained strong through the holidays, despite global uncertainty of the Omicron variant's impact on travel. However, business, group and international travel continue to lag behind pre-pandemic levels of performance."

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 148 properties representing 46,751 rooms, or 85.3 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.

In December 2021, domestic passengers could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 test result taken within 24 hours 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 \$518 million (+375.8% vs. 2020, +9.6% vs. 2019) in December. Room demand was 1.2 million room nights (+230.0% vs. 2020, -7.7% vs. 2019) and room supply was 1.7 million room nights (+7.7% vs. 2020, +1.8% vs. 2019) (Figure 2). Many properties closed or reduced operations starting in April 2020 due to the COVID-19 pandemic.

Luxury Class properties earned RevPAR of \$627 (+279.3% vs. 2020, +7.4% vs. 2019), with ADR at \$1,058 (+24.1% vs. 2020, +33.1% vs. 2019) and occupancy of 59.3 percent (+39.9 percentage points vs. 2020, -14.2 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$247 (+339.3% vs. 2020, +42.5% vs. 2019) with ADR at \$339 (+67.6% vs. 2020, +61.5% vs. 2019) and occupancy of 72.7 percent (+44.9 percentage points vs. 2020, -9.7 percentage points vs. 2019).

Maui County hotels led the counties in December and achieved RevPAR that surpassed December 2019. RevPAR was \$501 (+289.2% vs. 2020, +20.9% vs. 2019), with ADR at \$736 (+47.2% vs. 2020, +36.0% vs. 2019) and occupancy of 68.0 percent (+42.3 percentage points vs. 2020, -8.5 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$757 (+266.4% vs. 2020, -0.4% vs. 2019), with ADR at \$1,189 (+39.9% vs. 2020, +33.7% vs. 2019) and occupancy of 63.6 percent (+39.3 percentage points vs. 2020, -21.8 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$411 (+360.8% vs. 2020, +29.0% vs. 2019), ADR at \$590 (+41.9% vs. 2020, +39.0% vs. 2019) and occupancy of 69.7 percent (+48.2 percentage points vs. 2020, -5.4 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$359 (+318.2% vs. 2020, +37.3% vs. 2019), with ADR at \$489 (+50.9% vs. 2020, +48.6% vs. 2019), and occupancy of 73.5 percent (+47.0 percentage points vs. 2020, -6.1 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$581 (+298.2% vs. 2020, +49.2% vs. 2019), with ADR at \$830 (+52.6% vs. 2020, +68.7% vs. 2019), and occupancy of 69.9 percent (+43.1 percentage points vs. 2020, -9.1 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$284 (+1,023.2% vs. 2020, +15.0% vs. 2019), with ADR at \$409 (+120.0% vs. 2020, +19.3% vs. 2019) and occupancy of 69.4 percent (+55.8 percentage points vs. 2020, -2.6 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$212 (+386.6% vs. 2020, -11.3% vs. 2019) in December, ADR at \$282 (+53.6% vs. 2020, -1.7% vs. 2019) and occupancy of 75.0 percent (+51.3 percentage points vs. 2020, -8.1 percentage points vs. 2019). Waikīkī hotels earned \$200 (+392.7% vs. 2020, -14.4% vs. 2019) in RevPAR with ADR at \$267 (+47.0% vs. 2020, -4.6% vs. 2019) and occupancy of 74.9 percent (+52.5 percentage points vs. 2020, -8.6 percentage points vs. 2019).

Year-End 2021

In 2021, Hawai'i hotel performance statewide continued to be impacted by the COVID-19 pandemic. Hawai'i's hotels earned \$189 in annual RevPAR (+89.0% vs. 2020, -17.2% vs. 2019), with ADR at \$329 (+23.2% vs. 2020, +16.1% vs. 2019) and occupancy of 57.6 percent (+20.1 percentage points vs. 2020, -23.2 percentage points vs. 2019).

Total statewide hotel revenues for 2021 were \$3.7 billion (+156.1% vs. 2020, -18.7% vs. 2019). Room supply was 19.4 million room nights (+35.5% vs. 2020, -1.8% vs. 2019), and room demand was 11.2 million room nights (+107.9% vs. 2020, -30.0% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest 2021 RevPAR at \$189 (+89.0%). Miami, Florida was second at \$149 (+73.7%), followed by New York, New York at \$126 (+75.8%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in ADR at \$329 (+23.2%), followed by Miami, Florida at \$224 (+20.5%) and New York, New York at \$210 (+38.3%) (Figure 20).

With the U.S. Mainland accessible for road trips and short-haul inter-continental flights, the Hawaiian Islands' occupancy continued to be lower than many destinations in STR's top 25 markets, landing at the 14th spot (Figure 21). Tampa, Florida topped the country in occupancy at 68.4 percent (+17.5 percentage points), followed by Miami, Florida at 66.8 percent (+20.5 percentage points), and Los Angeles, California at 63.7 percent (+14.4 percentage points).

Comparison to International Markets

Hotels in the Maldives ranked highest in 2021 RevPAR for international "sun and sea" destinations at \$354 (+51.5%), followed by French Polynesia (\$340, +38.5%) and Maui County (\$323, +128.0%). Hawai'i Island, Kaua'i, and O'ahu ranked fourth, sixth, and ninth, respectively (Figure 22).

French Polynesia led in ADR at \$714 (+23.5%), followed by the Maldives (\$599, -15.6%) and Maui County (\$536, +31.1%). Hawai'i Island, Kaua'i, and O'ahu ranked fifth, sixth, and ninth, respectively (Figure 23).

Puerto Rico led in occupancy for "sun and sea" destinations at 64.1 percent (+30.9 percentage points), followed by Hawai'i Island (61.1%, +21.4 percentage points) and Maui County (60.2 percent, +25.6 percentage points). Kaua'i and O'ahu ranked sixth and eighth, respectively (Figure 24).

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

About the Hawai'i Hotel Performance Report

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

For December, the survey included 148 properties representing 46,751 rooms, or 85.3 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 76 properties on O'ahu representing 29,092 rooms (95.2%); 40 properties in the County of Maui, representing 9,622 rooms (73.8%); 17 properties on the island of Hawai'i, representing 4,890 rooms (71.3%); and 15 properties on Kaua'i, representing 3,147 rooms (71.8%).

About the Hawai'i Tourism Authority

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

For more information about HTA, please visit www.hawaii tourism authority.org. Follow updates from HTA (@HawaiiHTA) on [Facebook](#), [Instagram](#), [Twitter](#) and its new [YouTube Channel](#).
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Figure 1: Hawai'i Hotel Performance December 2021

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2020	Percentage Pt. Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	72.7%	23.7%	49.0%	\$419.24	\$290.83	44.2%	\$304.75	\$68.97	341.9%
Luxury Class	59.3%	19.4%	39.9%	\$1,057.80	\$852.24	24.1%	\$626.76	\$165.24	279.3%
Upper Upscale Class	75.1%	20.0%	55.1%	\$372.07	\$263.96	41.0%	\$279.35	\$52.83	428.8%
Upscale Class	76.2%	28.5%	47.7%	\$293.11	\$193.32	51.6%	\$223.49	\$55.09	305.7%
Upper Midscale Class	75.3%	30.0%	45.3%	\$222.60	\$149.28	49.1%	\$167.54	\$44.78	274.1%
Midscale & Economy Class	72.7%	27.7%	44.9%	\$339.25	\$202.39	67.6%	\$246.56	\$56.12	339.3%
O'ahu	75.0%	23.7%	51.3%	\$282.48	\$183.96	53.6%	\$211.79	\$43.52	386.6%
Waikiki	74.9%	22.3%	52.5%	\$267.14	\$181.72	47.0%	\$199.97	\$40.59	392.7%
Other O'ahu	75.7%	33.0%	42.6%	\$369.87	\$194.72	90.0%	\$279.85	\$64.29	335.3%
O'ahu Luxury	53.7%	14.0%	39.7%	\$789.34	\$524.56	50.5%	\$424.17	\$73.47	477.3%
O'ahu Upper Upscale	77.2%	17.3%	59.9%	\$288.54	\$211.47	36.4%	\$222.72	\$36.55	509.4%
O'ahu Upscale	80.8%	33.8%	47.0%	\$226.19	\$172.65	31.0%	\$182.79	\$58.34	213.3%
O'ahu Upper Midscale	75.5%	28.2%	47.2%	\$199.00	\$135.82	46.5%	\$150.15	\$38.33	291.7%
O'ahu Midscale & Economy	70.6%	34.9%	35.7%	\$157.11	\$97.66	60.9%	\$110.87	\$34.10	225.1%
Maui County	68.0%	25.7%	42.3%	\$736.46	\$500.44	47.2%	\$500.88	\$128.68	289.2%
Wailea	63.6%	24.3%	39.3%	\$1,189.18	\$850.10	39.9%	\$756.56	\$206.49	266.4%
Lahaina/Kā'anapali/Kapalua	69.7%	21.5%	48.2%	\$590.18	\$415.87	41.9%	\$411.44	\$89.28	360.8%
Other Maui County	66.0%	30.7%	35.4%	\$914.93	\$569.67	60.6%	\$604.25	\$174.77	245.7%
Maui County Luxury	56.4%	24.1%	32.3%	\$1,361.53	\$987.57	37.9%	\$768.14	\$237.92	222.9%
Maui County Upper Upscale & Upscale	72.1%	25.1%	47.0%	\$527.10	\$326.71	61.3%	\$379.97	\$81.86	364.2%
Island of Hawai'i	73.5%	26.5%	47.0%	\$489.13	\$324.04	50.9%	\$359.38	\$85.93	318.2%
Kohala Coast	69.9%	26.8%	43.1%	\$830.38	\$544.33	52.6%	\$580.80	\$145.87	298.2%
Kaua'i	69.4%	13.6%	55.8%	\$408.70	\$185.81	120.0%	\$283.84	\$25.27	1023.2%

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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 2: Hawai'i Hotel Performance by Measure December 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	1,699.6	1,578.5	7.7%	1,235.5	374.3	230.0%	518.0	108.9	375.8%
O'ahu	947.1	842.8	12.4%	710.1	199.4	256.2%	200.6	36.7	446.9%
Waikiki	806.9	738.9	9.2%	604.0	165.1	266.0%	161.4	30.0	438.0%
Maui County	404.1	396.1	2.0%	274.8	101.8	169.9%	202.4	51.0	297.2%
Wailea	89.9	85.8	4.7%	57.2	20.9	174.2%	68.0	17.7	283.6%
Lahaina/Kā'anapali/Kapalua	216.7	213.5	1.5%	151.0	45.8	229.5%	89.1	19.1	367.6%
Island of Hawai'i	212.7	208.4	2.0%	156.2	55.3	182.7%	76.4	17.9	326.7%
Kohala Coast	86.7	86.5	0.2%	60.6	23.2	161.6%	50.3	12.6	299.0%
Kaua'i	135.8	131.3	3.4%	94.3	17.9	428.3%	38.5	3.3	1061.9%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2020	Percentage Pt. Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	57.6%	37.6%	20.1%	\$328.68	\$266.81	23.2%	\$189.35	\$100.21	89.0%
Luxury Class	50.9%	38.0%	13.0%	\$778.25	\$609.87	27.6%	\$396.46	\$231.51	71.2%
Upper Upscale Class	56.3%	37.9%	18.4%	\$306.33	\$271.35	12.9%	\$172.33	\$102.74	67.7%
Upscale Class	62.2%	32.6%	29.6%	\$235.49	\$209.32	12.5%	\$146.43	\$68.15	114.9%
Upper Midscale Class	59.0%	41.5%	17.5%	\$174.19	\$161.96	7.5%	\$102.69	\$67.17	52.9%
Midscale & Economy Class	61.1%	44.3%	16.9%	\$254.28	\$165.88	53.3%	\$155.40	\$73.42	111.7%
O'ahu	55.6%	39.2%	16.4%	\$225.31	\$215.65	4.5%	\$125.19	\$84.46	48.2%
Waikiki	55.1%	37.6%	17.5%	\$212.51	\$214.56	-1.0%	\$117.17	\$80.68	45.2%
Other O'ahu	58.2%	47.6%	10.6%	\$299.56	\$220.27	36.0%	\$174.27	\$104.83	66.2%
O'ahu Luxury	42.9%	NA	NA	\$613.15	NA	NA	\$262.82	NA	NA
O'ahu Upper Upscale	52.8%	37.1%	15.7%	\$241.73	\$243.02	-0.5%	\$127.75	\$90.19	41.6%
O'ahu Upscale	63.7%	38.8%	24.9%	\$189.34	\$189.28	0.0%	\$120.65	\$73.42	64.3%
O'ahu Upper Midscale	57.6%	40.6%	17.0%	\$155.60	\$154.58	0.7%	\$89.68	\$62.83	42.7%
O'ahu Midscale & Economy	58.3%	50.4%	7.9%	\$121.58	\$123.76	-1.8%	\$70.91	\$62.44	13.6%
Maui County	60.2%	34.6%	25.6%	\$536.47	\$409.19	31.1%	\$322.70	\$141.55	128.0%
Wailea	56.4%	NA	NA	\$831.06	NA	NA	\$468.47	NA	NA
Lahaina/Kā'anapali/Kapalua	60.9%	29.4%	31.5%	\$450.49	\$371.79	21.2%	\$274.22	\$109.18	151.2%
Other Maui County	59.3%	41.0%	18.3%	\$638.62	\$441.91	44.5%	\$378.90	\$181.24	109.1%
Maui County Luxury	51.7%	NA	NA	\$922.59	NA	NA	\$477.28	NA	NA
Maui County Upper Upscale & Upscale	63.0%	31.6%	31.4%	\$407.35	\$338.02	20.5%	\$256.46	\$106.73	140.3%
Island of Hawai'i	61.1%	39.7%	21.4%	\$348.08	\$248.94	39.8%	\$212.62	\$98.77	115.3%
Kohala Coast	61.1%	NA	NA	\$551.56	NA	NA	\$337.10	NA	NA
Kaua'i	58.5%	33.2%	25.3%	\$324.19	\$264.58	22.5%	\$189.64	\$87.89	115.8%

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 Year-to-Date December 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	19,367.0	14,291.6	35.5%	11,157.5	5,367.7	107.9%	3,667.2	1,432.1	156.1%
O'ahu	10,668.5	7,644.8	39.6%	5,927.6	2,994.3	98.0%	1,335.6	645.7	106.8%
Waikiki	9,169.9	6,446.5	42.2%	5,055.8	2,424.0	108.6%	1,074.4	520.1	106.6%
Maui County	4,705.3	3,418.4	37.6%	2,830.3	1,182.5	139.4%	1,518.4	483.9	213.8%
Wailea	1,042.4	NA	NA	587.6	NA	NA	488.4	NA	NA
Lahaina/Kā'anapali/Kapalua	2,522.9	1,873.3	34.7%	1,535.7	550.1	179.2%	691.8	204.5	238.3%
Island of Hawai'i	2,469.0	1,826.7	35.2%	1,508.2	724.7	108.1%	525.0	180.4	191.0%
Kohala Coast	1,020.2	NA	NA	623.5	NA	NA	343.9	NA	NA
Kaua'i	1,524.1	1,401.8	8.7%	891.6	465.7	91.5%	289.0	123.2	134.6%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	72.7%	80.2%	-7.5%	\$419.24	\$353.00	18.8%	\$304.75	\$283.22	7.6%
Luxury Class	59.3%	73.4%	-14.2%	\$1,057.80	\$794.47	33.1%	\$626.76	\$583.37	7.4%
Upper Upscale Class	75.1%	81.6%	-6.5%	\$372.07	\$334.21	11.3%	\$279.35	\$272.70	2.4%
Upscale Class	76.2%	81.4%	-5.2%	\$293.11	\$239.93	22.2%	\$223.49	\$195.39	14.4%
Upper Midscale Class	75.3%	80.6%	-5.4%	\$222.60	\$202.83	9.7%	\$167.54	\$163.51	2.5%
Midscale & Economy Class	72.7%	82.4%	-9.7%	\$339.25	\$210.05	61.5%	\$246.56	\$173.04	42.5%
O'ahu	75.0%	83.1%	-8.1%	\$282.48	\$287.38	-1.7%	\$211.79	\$238.71	-11.3%
Waikiki	74.9%	83.5%	-8.6%	\$267.14	\$279.92	-4.6%	\$199.97	\$233.74	-14.4%
Other O'ahu	75.7%	80.5%	-4.8%	\$369.87	\$332.73	11.2%	\$279.85	\$267.84	4.5%
O'ahu Luxury	53.7%	75.3%	-21.5%	\$789.34	\$651.17	21.2%	\$424.17	\$490.15	-13.5%
O'ahu Upper Upscale	77.2%	83.0%	-5.8%	\$288.54	\$302.62	-4.7%	\$222.72	\$251.16	-11.3%
O'ahu Upscale	80.8%	87.8%	-7.0%	\$226.19	\$226.03	0.1%	\$182.79	\$198.43	-7.9%
O'ahu Upper Midscale	75.5%	80.0%	-4.5%	\$199.00	\$194.98	2.1%	\$150.15	\$155.97	-3.7%
O'ahu Midscale & Economy	70.6%	88.4%	-17.8%	\$157.11	\$161.20	-2.5%	\$110.87	\$142.51	-22.2%
Maui County	68.0%	76.5%	-8.5%	\$736.46	\$541.45	36.0%	\$500.88	\$414.31	20.9%
Wailea	63.6%	85.4%	-21.8%	\$1,189.18	\$889.53	33.7%	\$756.56	\$759.78	-0.4%
Lahaina/Kā'anapali/Kapalua	69.7%	75.1%	-5.4%	\$590.18	\$424.66	39.0%	\$411.44	\$319.04	29.0%
Other Maui County	66.0%	78.2%	-12.2%	\$914.93	\$678.42	34.9%	\$604.25	\$530.61	13.9%
Maui County Luxury	56.4%	74.3%	-17.9%	\$1,361.53	\$983.19	38.5%	\$768.14	\$730.54	5.1%
Maui County Upper Upscale & Upscale	72.1%	77.5%	-5.5%	\$527.10	\$388.27	35.8%	\$379.97	\$301.07	26.2%
Island of Hawai'i	73.5%	79.5%	-6.1%	\$489.13	\$329.07	48.6%	\$359.38	\$261.73	37.3%
Kohala Coast	69.9%	79.1%	-9.1%	\$830.38	\$492.37	68.7%	\$580.80	\$389.38	49.2%
Kaua'i	69.4%	72.1%	-2.6%	\$408.70	\$342.53	19.3%	\$283.84	\$246.80	15.0%

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 December 2021 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	1,699.6	1,668.8	1.8%	1,235.5	1,338.9	-7.7%	518.0	472.6	9.6%
O'ahu	947.1	946.8	0.0%	710.1	786.5	-9.7%	200.6	226.0	-11.3%
Waikiki	806.9	808.9	-0.2%	604.0	675.4	-10.6%	161.4	189.1	-14.7%
Maui County	404.1	391.0	3.4%	274.8	299.2	-8.1%	202.4	162.0	25.0%
Wailea	89.9	68.0	32.1%	57.2	58.1	-1.6%	68.0	51.7	31.6%
Lahaina/Kā'anapali/Kapalua	216.7	214.9	0.8%	151.0	161.5	-6.5%	89.1	68.6	30.0%
Island of Hawai'i	212.7	197.9	7.5%	156.2	157.4	-0.7%	76.4	51.8	47.5%
Kohala Coast	86.7	91.1	-4.9%	60.6	72.1	-15.9%	50.3	35.5	41.9%
Kaua'i	135.8	133.1	2.0%	94.3	95.9	-1.7%	38.5	32.9	17.3%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	57.6%	80.8%	-23.2%	\$328.68	\$283.05	16.1%	\$189.35	\$228.78	-17.2%
Luxury Class	50.9%	76.2%	-25.3%	\$778.25	\$563.35	38.1%	\$396.46	\$429.39	-7.7%
Upper Upscale Class	56.3%	82.6%	-26.4%	\$306.33	\$278.87	9.8%	\$172.33	\$230.38	-25.2%
Upscale Class	62.2%	79.1%	-16.9%	\$235.49	\$209.86	12.2%	\$146.43	\$166.04	-11.8%
Upper Midscale Class	59.0%	83.1%	-24.2%	\$174.19	\$166.67	4.5%	\$102.69	\$138.53	-25.9%
Midscale & Economy Class	61.1%	82.1%	-21.0%	\$254.28	\$177.05	43.6%	\$155.40	\$145.32	6.9%
O'ahu	55.6%	84.1%	-28.6%	\$225.31	\$240.92	-6.5%	\$125.19	\$202.69	-38.2%
Waikiki	55.1%	84.5%	-29.4%	\$212.51	\$236.15	-10.0%	\$117.17	\$199.53	-41.3%
Other O'ahu	58.2%	82.0%	-23.8%	\$299.56	\$270.47	10.8%	\$174.27	\$221.68	-21.4%
O'ahu Luxury	42.9%	74.1%	-31.2%	\$613.15	\$499.67	22.7%	\$262.82	\$370.14	-29.0%
O'ahu Upper Upscale	52.8%	85.3%	-32.4%	\$241.73	\$260.79	-7.3%	\$127.75	\$222.44	-42.6%
O'ahu Upscale	63.7%	85.6%	-21.9%	\$189.34	\$198.07	-4.4%	\$120.65	\$169.60	-28.9%
O'ahu Upper Midscale	57.6%	83.3%	-25.7%	\$155.60	\$160.64	-3.1%	\$89.68	\$133.85	-33.0%
O'ahu Midscale & Economy	58.3%	87.6%	-29.3%	\$121.58	\$134.55	-9.6%	\$70.91	\$117.87	-39.8%
Maui County	60.2%	77.7%	-17.5%	\$536.47	\$401.10	33.7%	\$322.70	\$311.61	3.6%
Wailea	56.4%	88.4%	-32.1%	\$831.06	\$618.32	34.4%	\$468.47	\$546.83	-14.3%
Lahaina/Kā'anapali/Kapalua	60.9%	76.6%	-15.7%	\$450.49	\$335.19	34.4%	\$274.22	\$256.68	6.8%
Other Maui County	59.3%	79.1%	-19.7%	\$638.62	\$481.04	32.8%	\$378.90	\$380.40	-0.4%
Maui County Luxury	51.7%	79.9%	-28.2%	\$922.59	\$642.69	43.6%	\$477.28	\$513.64	-7.1%
Maui County Upper Upscale & Upscale	63.0%	77.6%	-14.6%	\$407.35	\$315.67	29.0%	\$256.46	\$244.89	4.7%
Island of Hawai'i	61.1%	77.0%	-16.0%	\$348.08	\$265.44	31.1%	\$212.62	\$204.50	4.0%
Kohala Coast	61.1%	77.7%	-16.6%	\$551.56	\$377.94	45.9%	\$337.10	\$293.64	14.8%
Kaua'i	58.5%	72.8%	-14.3%	\$324.19	\$282.67	14.7%	\$189.64	\$205.65	-7.8%

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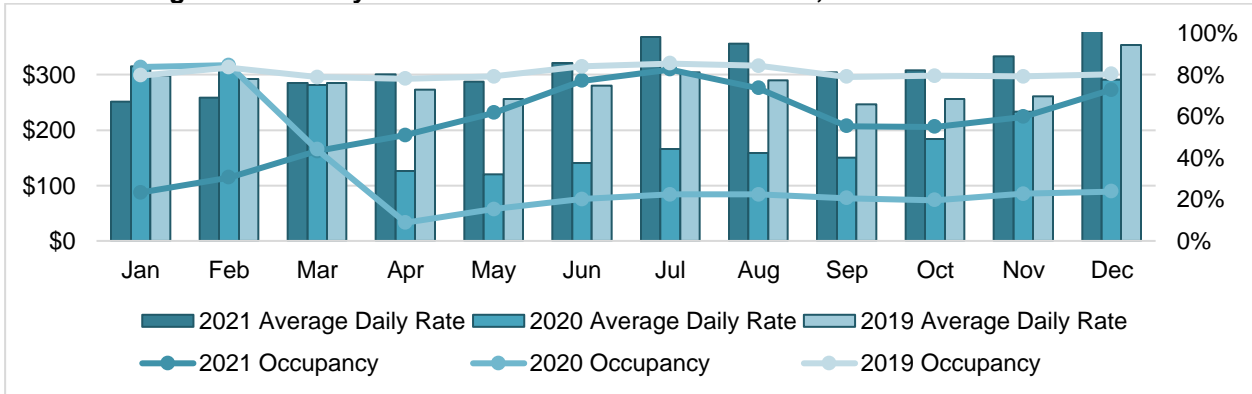
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2019	% Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	19,367.0	19,714.0	-1.8%	11,157.5	15,934.0	-30.0%	3,667.2	4,510.2	-18.7%
O'ahu	10,668.5	11,087.5	-3.8%	5,927.6	9,328.1	-36.5%	1,335.6	2,247.3	-40.6%
Waikiki	9,169.9	9,507.5	-3.6%	5,055.8	8,033.1	-37.1%	1,074.4	1,897.0	-43.4%
Maui County	4,705.3	4,639.3	1.4%	2,830.3	3,604.2	-21.5%	1,518.4	1,445.6	5.0%
Wailea	1,042.4	800.8	30.2%	587.6	708.2	-17.0%	488.4	437.9	11.5%
Lahaina/Kā'anapali/Kapalua	2,522.9	2,579.6	-2.2%	1,535.7	1,975.4	-22.3%	691.8	662.1	4.5%
Island of Hawai'i	2,469.0	2,354.7	4.9%	1,508.2	1,814.1	-16.9%	525.0	481.5	9.0%
Kohala Coast	1,020.2	1,087.7	-6.2%	623.5	845.1	-26.2%	343.9	319.4	7.7%
Kaua'i	1,524.1	1,632.5	-6.6%	891.6	1,187.7	-24.9%	289.0	335.7	-13.9%

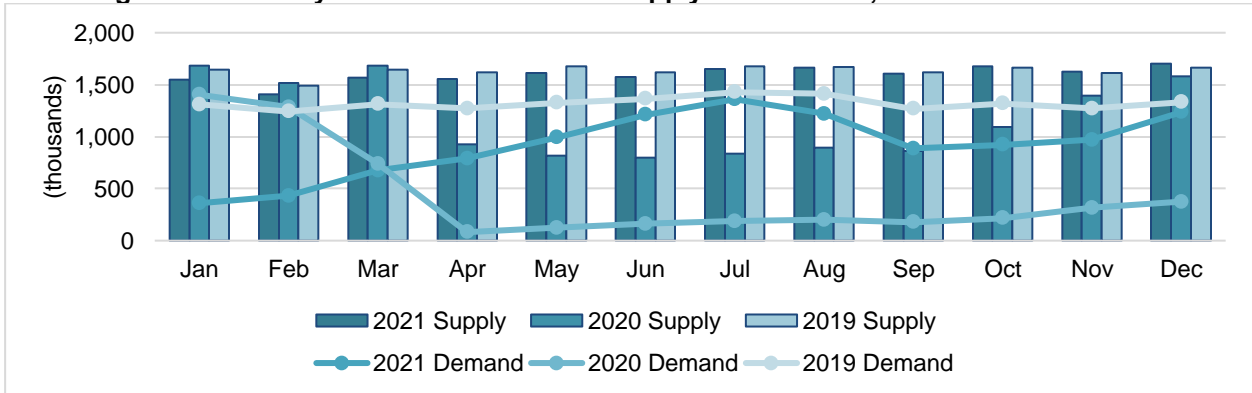
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



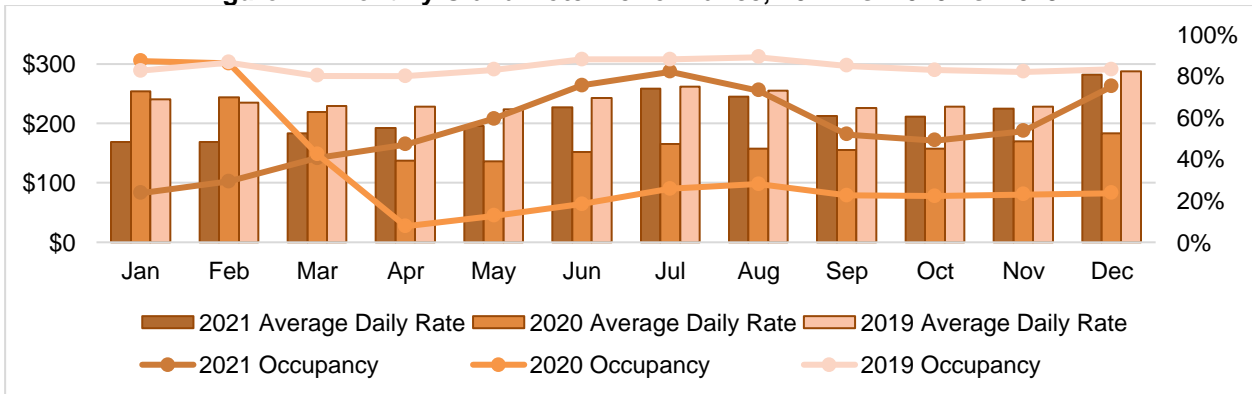
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



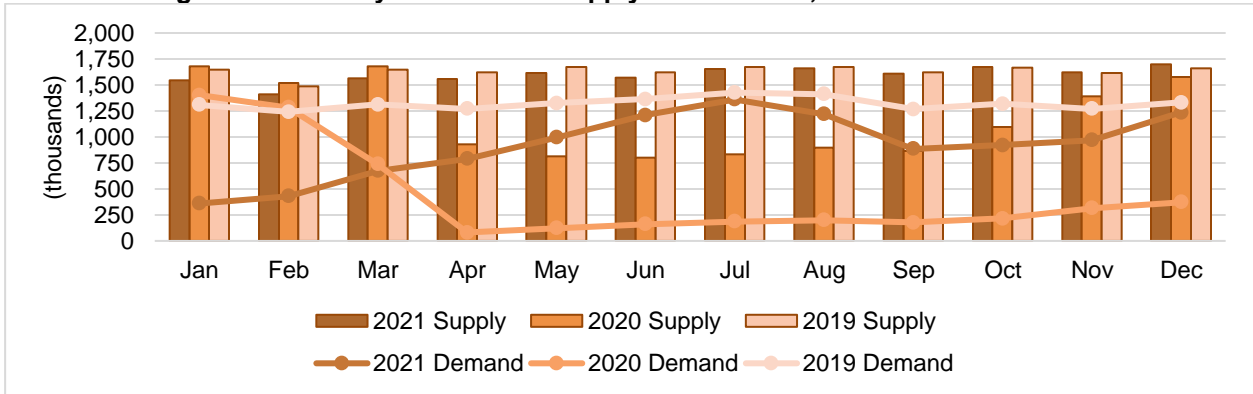
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Figure 11: Monthly O'ahu Hotel Performance, 2021 vs. 2020 vs. 2019



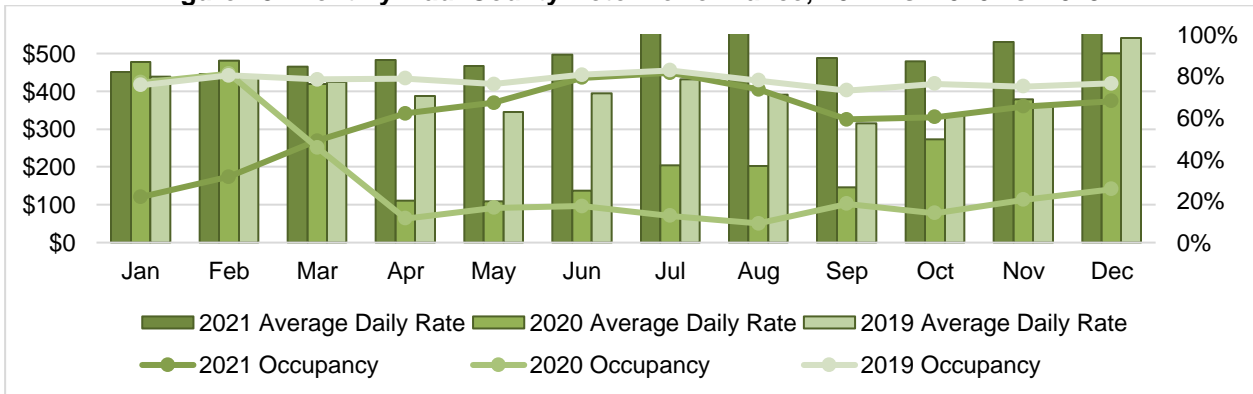
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



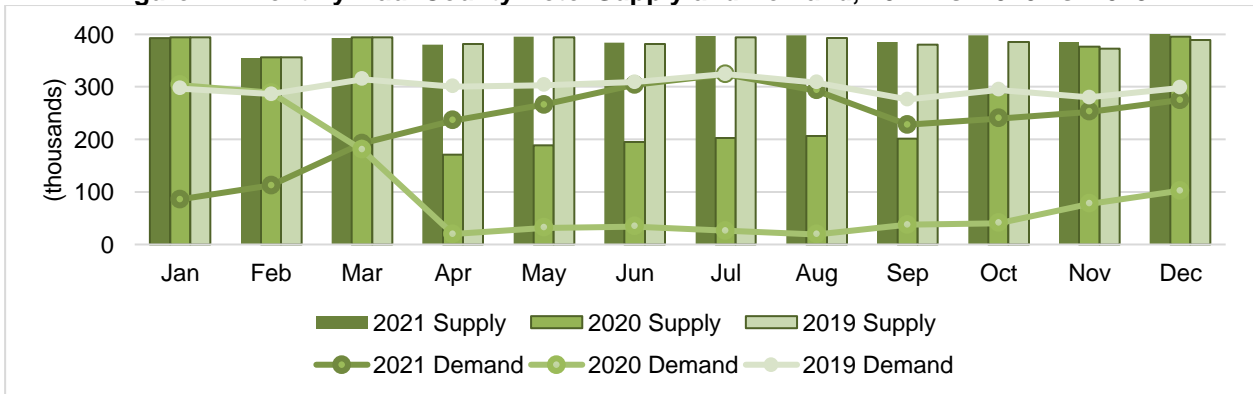
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Figure 13: Monthly Maui County Hotel Performance, 2021 vs. 2020 vs. 2019



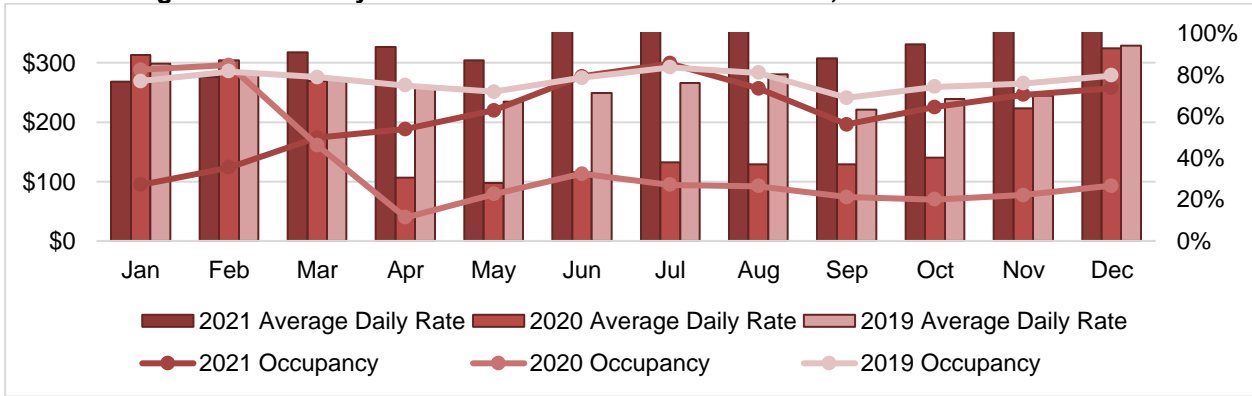
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



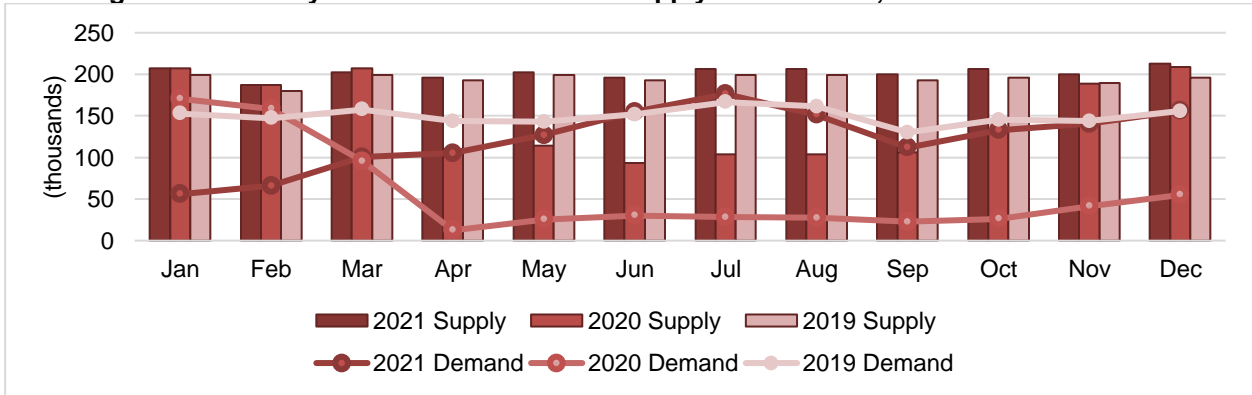
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2021 vs. 2020 vs. 2019



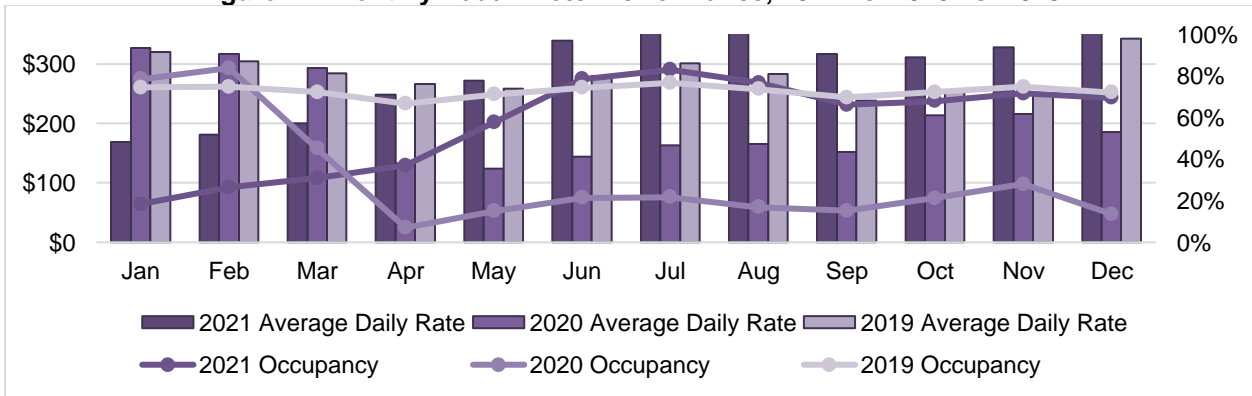
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2021 vs. 2020 vs. 2019



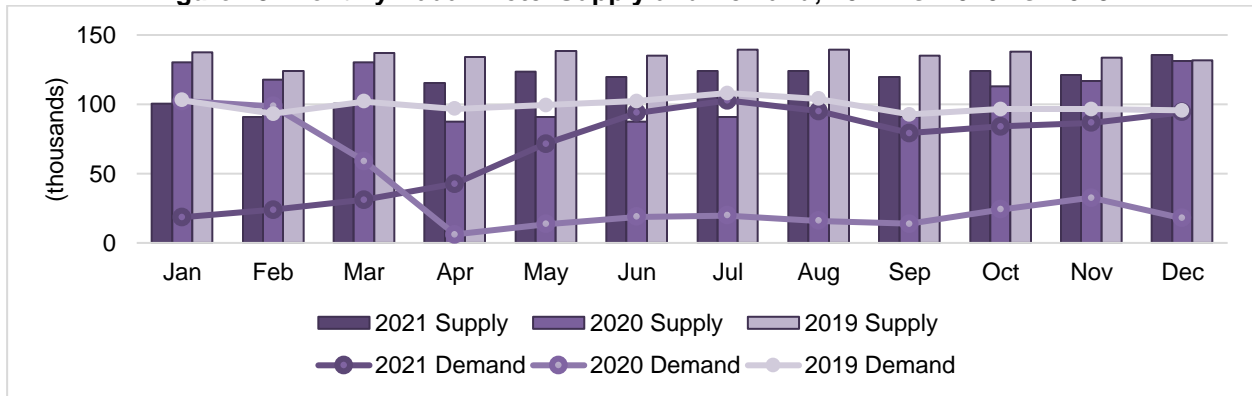
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Figure 17: Monthly Kaua'i Hotel Performance, 2021 vs. 2020 vs. 2019



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



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

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$189.35	89.0%
2	Miami, FL	\$149.26	73.7%
3	New York, NY	\$125.53	75.8%
4	Los Angeles, CA	\$103.68	52.8%
5	San Diego, CA	\$101.81	61.0%

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

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$328.68	23.2%
2	Miami, FL	\$223.50	20.5%
3	New York, NY	\$210.06	38.3%
4	Orange County, CA	\$167.69	23.7%
5	San Diego, CA	\$164.56	26.7%

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

Rank	Destination	Occupancy	Percentage Pt. Change
1	Tampa, FL	68.4%	17.5%
2	Miami, FL	66.8%	20.5%
3	Los Angeles, CA	63.7%	14.4%
4	Phoenix, AZ	63.0%	12.8%
5	San Diego, CA	61.9%	13.2%
14	Hawaiian Islands	57.6%	20.1%

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

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$353.96	51.5%
2	French Polynesia	\$339.78	38.5%
3	Maui	\$322.70	128.0%
4	Hawai'i Island	\$212.62	115.3%
5	Cabo San Lucas+	\$204.76	85.3%
6	Kaua'i	\$189.64	115.8%
7	Puerto Rico	\$158.26	142.8%
8	Aruba	\$156.88	25.2%
9	O'ahu	\$125.19	48.2%
10	Cancun+	\$118.52	85.3%
11	Costa Rica	\$76.36	45.6%
12	Puerto Vallarta+	\$58.47	69.5%
13	Fiji	\$22.26	-17.4%
14	Phuket	\$16.30	-53.0%
15	Bali	\$11.43	-34.4%

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

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$714.30	23.5%
2	Maldives	\$598.93	-15.6%
3	Maui	\$536.47	31.1%
4	Cabo San Lucas+	\$400.88	18.8%
5	Hawai'i Island	\$348.08	39.8%
6	Kaua'i	\$324.19	22.5%
7	Aruba	\$306.09	-18.5%
8	Puerto Rico	\$246.95	25.9%
9	O'ahu	\$225.31	4.5%
10	Cancun+	\$202.23	9.1%
11	Costa Rica	\$186.84	4.0%
12	Puerto Vallarta+	\$104.83	17.6%
13	Phuket	\$95.07	-32.4%
14	Fiji	\$86.81	-14.9%
15	Bali	\$64.49	-24.4%

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

Rank	Destination	Occupancy	Percentage Pt. Change
1	Puerto Rico	64.1%	30.9%
2	Hawai'i Island	61.1%	21.4%
3	Maui	60.2%	25.6%
4	Maldives	59.1%	26.2%
5	Cancun+	58.6%	24.1%
6	Kaua'i	58.5%	25.3%
7	Puerto Vallarta+	55.8%	17.1%
8	O'ahu	55.6%	16.4%
9	Aruba	51.3%	17.9%
10	Cabo San Lucas+	51.1%	18.3%
11	French Polynesia	47.6%	5.2%
12	Costa Rica	40.9%	11.7%
13	Fiji	25.6%	-0.8%
14	Bali	17.7%	-2.7%
15	Phuket	17.1%	-7.5%

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