



## January 2022 Hawaii Hotel Performance Report

### Hawaii Hotels Started the Year with ADR Ahead of January 2021 and 2019, but RevPAR Lagged 2019 Due to Lower Occupancy

Hawaii hotels statewide reported substantially higher revenue per available room (RevPAR), average daily rate (ADR), and occupancy in January 2022 compared to January 2021. When compared to January 2019, statewide ADR was higher in January 2022, but RevPAR declined due to lower occupancy levels.

According to the Hawaii Hotel Performance Report published by the Hawaii Tourism Authority (HTA), statewide RevPAR in January 2022 was \$233 (+305.8%), with ADR at \$357 (+41.3%) and occupancy of 65.4 percent (+42.6 percentage points) compared to January 2021 (Figure 1). Compared with January 2019, RevPAR was 1.3 percent lower due to higher ADR (+20.0%) being offset by lower occupancy (-14.1 percentage points) (Figure 5).

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 January, the survey included 149 properties representing 46,771 rooms, or 84.9 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 and are reported separately.

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

Hawaii hotel room revenues statewide was \$398.7 million (+341.7% vs. 2021, +0.6% vs. 2019) in January. Room demand was 1.1 million room nights (+212.6% vs. 2021, -16.2% vs. 2019) and room supply was 1.7 million room nights (+8.8% vs. 2021, +1.9% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$427 (+219.7% vs. 2021, -5.7% vs. 2019), with ADR at \$832 (+6.0% vs. 2021, +35.3% vs. 2019) and occupancy of 51.4 percent (+34.3 percentage points vs. 2021, -22.4 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$217 (+387.8% vs. 2021, +39.0% vs. 2019) with ADR at \$281 (+80.0% vs. 2021, +48.4% vs. 2019) and occupancy of 77.0 percent (+48.6 percentage points vs. 2021, -5.2 percentage points vs. 2019).

Maui County hotels led the counties in January and achieved RevPAR that surpassed January 2019. RevPAR was \$379 (+287.1% vs. 2021, +14.1% vs. 2019), with ADR at \$619 (+37.2% vs. 2021, +41.1% vs. 2019) and occupancy of 61.2 percent (+39.5 percentage points vs. 2021, -14.5 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$523 (+248.6%

vs. 2021, -6.3% vs. 2019), with ADR at \$904 (+10.6% vs. 2021, +38.7% vs. 2019) and occupancy of 57.9 percent (+39.5 percentage points vs. 2021, -27.8 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$316 (+366.0% vs. 2021, +14.9% vs. 2019), ADR at \$515 (+40.2% vs. 2021, +38.8% vs. 2019) and occupancy of 61.3 percent (+42.8 percentage points vs. 2021, -12.8 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$282 (+303.3% vs. 2021, +23.3% vs. 2019), with ADR at \$394 (+46.9% vs. 2021, +32.3% vs. 2019), and occupancy of 71.6 percent (+45.5 percentage points vs. 2021, -5.3 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$431 (+306.1% vs. 2021, +33.3% vs. 2019), with ADR at \$635 (+44.4% vs. 2021, +50.0% vs. 2019), and occupancy of 67.9 percent (+43.7 percentage points vs. 2021, -8.5 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$247 (+692.3% vs. 2021, +3.5% vs. 2019), with ADR at \$368 (+112.3% vs. 2021, +15.0% vs. 2019) and occupancy of 67.1 percent (+49.1 percentage points vs. 2021, -7.4 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$158 (+306.1% vs. 2021, -20.0% vs. 2019) in January, with ADR at \$242 (+43.1% vs. 2021, +0.6% vs. 2019) and occupancy of 65.5 percent (+42.4 percentage points vs. 2021, -16.9 percentage points vs. 2019). Waikīkī hotels earned \$149 (+324.4% vs. 2021, -23.7% vs. 2019) in RevPAR with ADR at \$229 (+38.8% vs. 2021, -2.6% vs. 2019) and occupancy of 65.0 percent (+43.7 percentage points vs. 2021, -17.9 percentage points vs. 2019).

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

## About the Hawai'i Hotel Performance Report

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

For January 2022, the survey included 149 properties representing 46,771 rooms, or 84.9 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The January survey included 76 properties on O'ahu representing 29,092 rooms (94.9%); 40 properties in the County of Maui, representing 9,603 rooms (73.2%); 17 properties on the island of Hawai'i, representing 4,890 rooms (71.2%); and 16 properties on Kaua'i, representing 3,186 rooms (71.6%).

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

	Occupancy %			Average Daily Rate			RevPAR		
	2022	2021	Percentage Pt. Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	65.4%	22.8%	42.6%	\$357.22	\$252.78	41.3%	\$233.46	\$57.53	305.8%
Luxury Class	51.4%	17.0%	34.3%	\$831.52	\$784.20	6.0%	\$427.28	\$133.64	219.7%
Upper Upscale Class	65.8%	19.5%	46.4%	\$314.76	\$231.58	35.9%	\$207.24	\$45.07	359.8%
Upscale Class	70.0%	27.3%	42.7%	\$248.25	\$169.09	46.8%	\$173.88	\$46.18	276.5%
Upper Midscale Class	67.4%	30.0%	37.4%	\$268.91	\$163.05	64.9%	\$181.28	\$48.96	270.3%
Midscale & Economy Class	77.0%	28.4%	48.6%	\$281.34	\$156.31	80.0%	\$216.68	\$44.42	387.8%
<b>O'ahu</b>	65.5%	23.1%	42.4%	\$241.64	\$168.81	43.1%	\$158.26	\$38.97	306.1%
Waikiki	65.0%	21.3%	43.7%	\$229.18	\$165.13	38.8%	\$148.91	\$35.09	324.4%
Other O'ahu	68.4%	35.8%	32.6%	\$308.36	\$183.97	67.6%	\$210.97	\$65.81	220.6%
O'ahu Luxury	39.4%	12.9%	26.5%	\$659.39	\$499.75	31.9%	\$259.76	\$64.26	304.2%
O'ahu Upper Upscale	66.3%	17.8%	48.5%	\$246.43	\$193.06	27.6%	\$163.31	\$34.36	375.3%
O'ahu Upscale	74.5%	31.8%	42.7%	\$199.71	\$150.10	33.1%	\$148.82	\$47.72	211.9%
O'ahu Upper Midscale	64.1%	29.8%	34.2%	\$166.46	\$120.97	37.6%	\$106.67	\$36.10	195.5%
O'ahu Midscale & Economy	75.5%	33.3%	42.3%	\$142.54	\$101.43	40.5%	\$107.64	\$33.73	219.1%
<b>Maui County</b>	61.2%	21.7%	39.5%	\$619.39	\$451.61	37.2%	\$379.03	\$97.92	287.1%
Wailea	57.9%	18.4%	39.5%	\$904.08	\$817.10	10.6%	\$523.44	\$150.14	248.6%
Lahaina/Kā'anapali/Kapalua	61.3%	18.4%	42.8%	\$514.90	\$367.28	40.2%	\$315.55	\$67.71	366.0%
Other Maui County	61.1%	25.4%	35.7%	\$738.80	\$522.05	41.5%	\$451.35	\$132.73	240.1%
Maui County Luxury	51.6%	19.5%	32.1%	\$1,007.98	\$899.35	12.1%	\$519.72	\$175.02	196.9%
Maui County Upper Upscale & Upscale	62.9%	21.9%	41.0%	\$454.17	\$298.22	52.3%	\$285.59	\$65.22	337.9%
<b>Island of Hawai'i</b>	71.6%	26.1%	45.5%	\$394.15	\$268.24	46.9%	\$282.16	\$69.96	303.3%
Kohala Coast	67.9%	24.1%	43.7%	\$634.98	\$439.80	44.4%	\$430.87	\$106.10	306.1%
<b>Kauai</b>	67.1%	18.0%	49.1%	\$368.16	\$173.39	112.3%	\$246.88	\$31.16	692.3%

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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 2: Hawai'i Hotel Performance by Measure January 2022**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2021	% Change	2022	2021	% Change	2022	2021	% Change
<b>State of Hawai'i</b>	1,707.7	1,568.9	8.8%	1,116.1	357.0	212.6%	398.7	90.3	341.7%
<b>O'ahu</b>	950.1	847.9	12.0%	622.2	195.7	217.9%	150.4	33.0	355.1%
Waikiki	806.9	741.0	8.9%	524.3	157.5	232.9%	120.2	26.0	362.1%
<b>Maui County</b>	406.8	399.1	1.9%	249.0	86.5	187.7%	154.2	39.1	294.6%
Wailea	90.6	86.6	4.7%	52.4	15.9	229.8%	47.4	13.0	264.9%
Lahaina/Kā'anapali/Kapalua	216.7	213.7	1.4%	132.8	39.4	237.1%	68.4	14.5	372.6%
<b>Island of Hawai'i</b>	213.0	208.8	2.0%	152.5	54.5	179.9%	60.1	14.6	311.3%
Kohala Coast	86.7	86.5	0.2%	58.8	20.9	181.9%	37.3	9.2	307.0%
<b>Kauai</b>	137.9	113.1	21.9%	92.4	20.3	354.7%	34.0	3.5	865.4%

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**Figure 3: Hawai'i Hotel Performance January 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>	65.4%	79.5%	-14.1%	\$357.22	\$297.56	20.0%	\$233.46	\$236.51	-1.3%
Luxury Class	51.4%	73.8%	-22.4%	\$831.52	\$614.57	35.3%	\$427.28	\$453.28	-5.7%
Upper Upscale Class	65.8%	82.0%	-16.2%	\$314.76	\$292.50	7.6%	\$207.24	\$239.95	-13.6%
Upscale Class	70.0%	76.1%	-6.0%	\$248.25	\$223.77	10.9%	\$173.88	\$170.21	2.2%
Upper Midscale Class	67.4%	82.8%	-15.4%	\$268.91	\$165.43	62.6%	\$181.28	\$136.97	32.4%
Midscale & Economy Class	77.0%	82.2%	-5.2%	\$281.34	\$189.52	48.4%	\$216.68	\$155.85	39.0%
<b>O'ahu</b>	65.5%	82.4%	-16.9%	\$241.64	\$240.10	0.6%	\$158.26	\$197.83	-20.0%
Waikiki	65.0%	82.9%	-17.9%	\$229.18	\$235.39	-2.6%	\$148.91	\$195.08	-23.7%
Other O'ahu	68.4%	79.5%	-11.1%	\$308.36	\$269.85	14.3%	\$210.97	\$214.47	-1.6%
O'ahu Luxury	39.4%	68.6%	-29.2%	\$659.39	\$527.69	25.0%	\$259.76	\$362.02	-28.2%
O'ahu Upper Upscale	66.3%	84.8%	-18.6%	\$246.43	\$263.86	-6.6%	\$163.31	\$223.86	-27.0%
O'ahu Upscale	74.5%	81.4%	-6.9%	\$199.71	\$192.15	3.9%	\$148.82	\$156.37	-4.8%
O'ahu Upper Midscale	64.1%	82.9%	-18.8%	\$166.46	\$156.63	6.3%	\$106.67	\$129.90	-17.9%
O'ahu Midscale & Economy	75.5%	86.2%	-10.7%	\$142.54	\$131.67	8.3%	\$107.64	\$113.48	-5.1%
<b>Maui County</b>	61.2%	75.6%	-14.5%	\$619.39	\$438.99	41.1%	\$379.03	\$332.08	14.1%
Wailea	57.9%	85.7%	-27.8%	\$904.08	\$651.71	38.7%	\$523.44	\$558.72	-6.3%
Lahaina/Kā'anapali/Kapalua	61.3%	74.1%	-12.8%	\$514.90	\$371.00	38.8%	\$315.55	\$274.73	14.9%
Other Maui County	61.1%	77.7%	-16.6%	\$738.80	\$521.70	41.6%	\$451.35	\$405.26	11.4%
Maui County Luxury	51.6%	77.0%	-25.5%	\$1,007.98	\$719.63	40.1%	\$519.72	\$554.43	-6.3%
Maui County Upper Upscale & Upscale	62.9%	75.3%	-12.4%	\$454.17	\$349.31	30.0%	\$285.59	\$263.02	8.6%
<b>Island of Hawai'i</b>	71.6%	76.8%	-5.3%	\$394.15	\$297.89	32.3%	\$282.16	\$228.89	23.3%
Kohala Coast	67.9%	76.3%	-8.5%	\$634.98	\$423.40	50.0%	\$430.87	\$323.15	33.3%
<b>Kauai</b>	67.1%	74.5%	-7.4%	\$368.16	\$320.18	15.0%	\$246.88	\$238.42	3.5%

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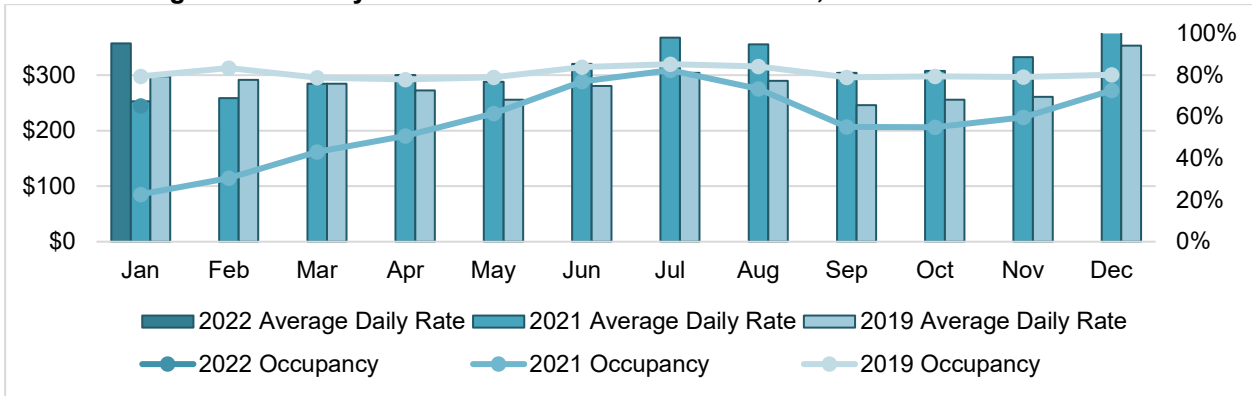
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

**Figure 4: Hawai'i Hotel Performance by Measure January 2022 vs. 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2022	2019	% Change	2022	2019	% Change	2022	2019	% Change
<b>State of Hawai'i</b>	1,707.7	1,676.2	1.9%	1,116.1	1,332.3	-16.2%	398.7	396.4	0.6%
<b>O'ahu</b>	950.1	942.5	0.8%	622.2	776.5	-19.9%	150.4	186.5	-19.4%
Waikiki	806.9	808.8	-0.2%	524.3	670.3	-21.8%	120.2	157.8	-23.8%
<b>Maui County</b>	406.8	394.5	3.1%	249.0	298.4	-16.6%	154.2	131.0	17.7%
Wailea	90.6	68.0	33.2%	52.4	58.3	-10.1%	47.4	38.0	24.8%
Lahaina/Kā'anapali/Kapalua	216.7	221.2	-2.0%	132.8	163.8	-18.9%	68.4	60.8	12.5%
<b>Island of Hawai'i</b>	213.0	199.1	7.0%	152.5	153.0	-0.3%	60.1	45.6	31.9%
Kohala Coast	86.7	93.0	-6.8%	58.8	71.0	-17.1%	37.3	30.1	24.3%
<b>Kauai</b>	137.9	140.2	-1.6%	92.4	104.4	-11.4%	34.0	33.4	1.9%

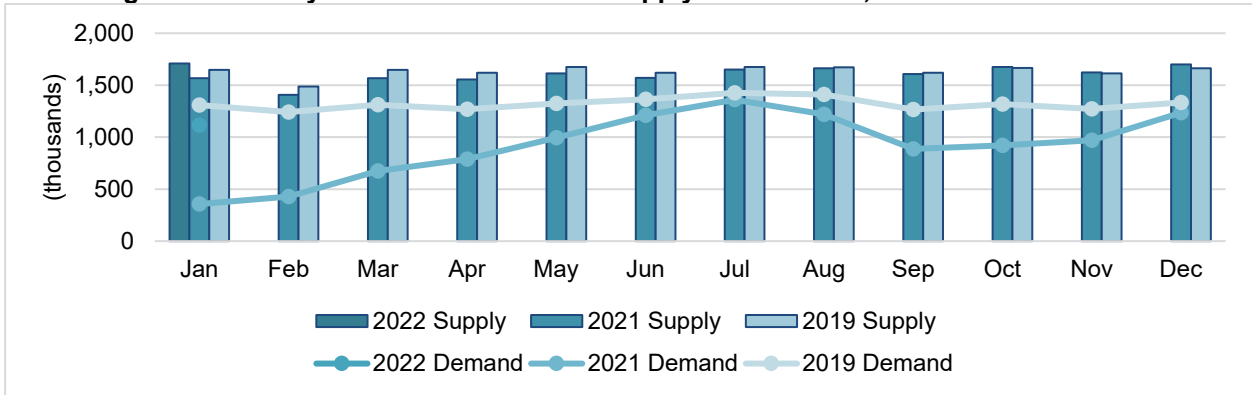
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**Figure 5: Monthly State of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



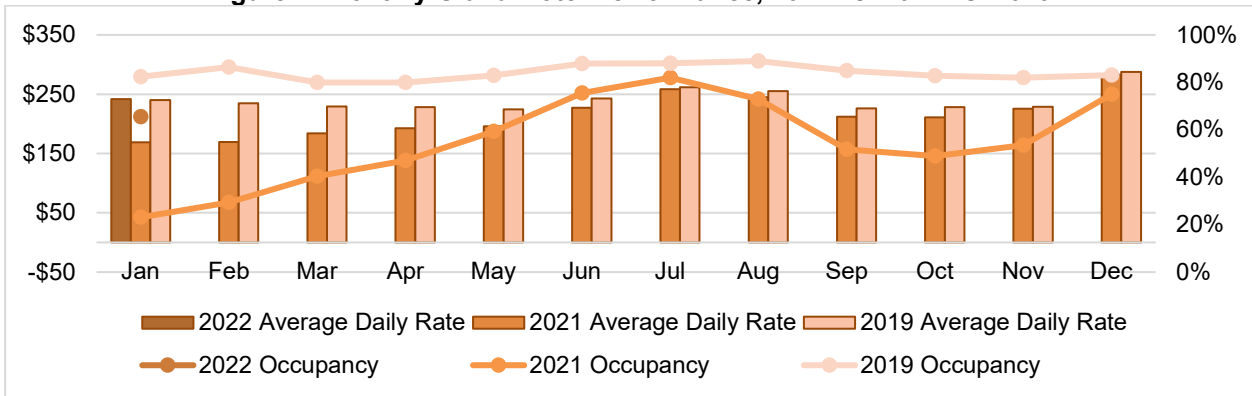
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**Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



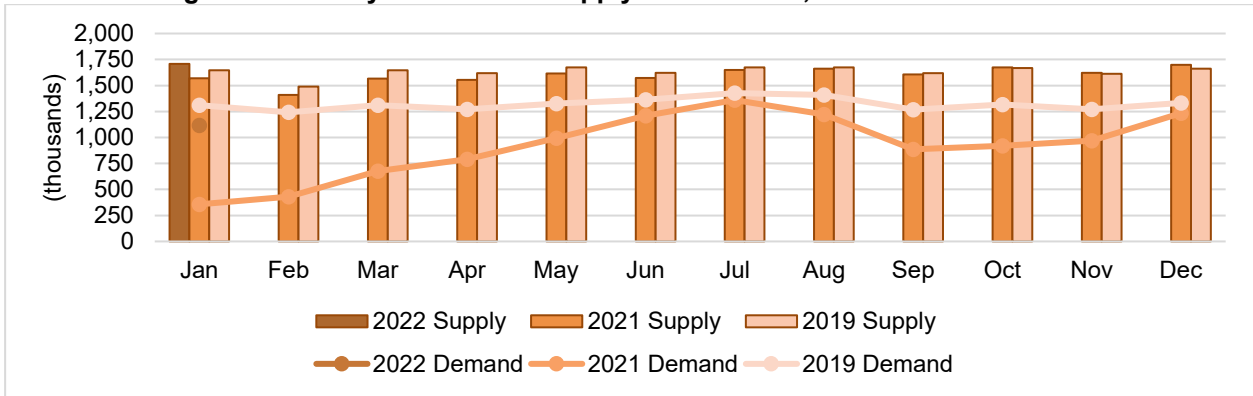
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**Figure 7: Monthly O'ahu Hotel Performance, 2022 vs. 2021 vs. 2019**



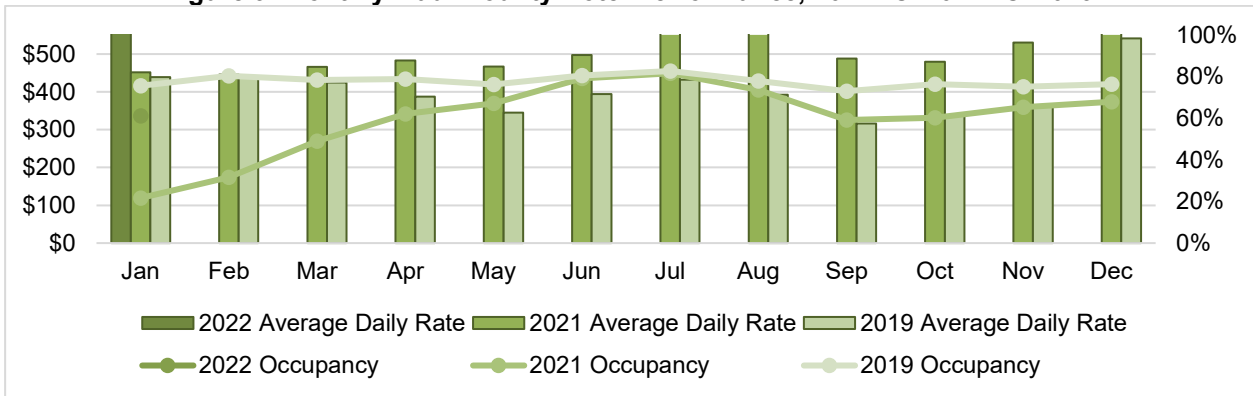
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**Figure 8: Monthly O'ahu Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



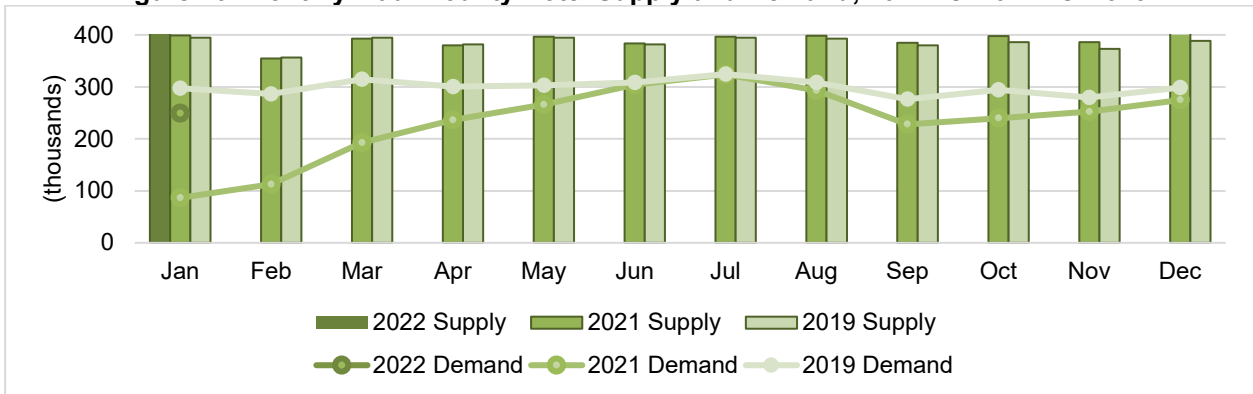
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**Figure 9: Monthly Maui County Hotel Performance, 2022 vs. 2021 vs. 2019**



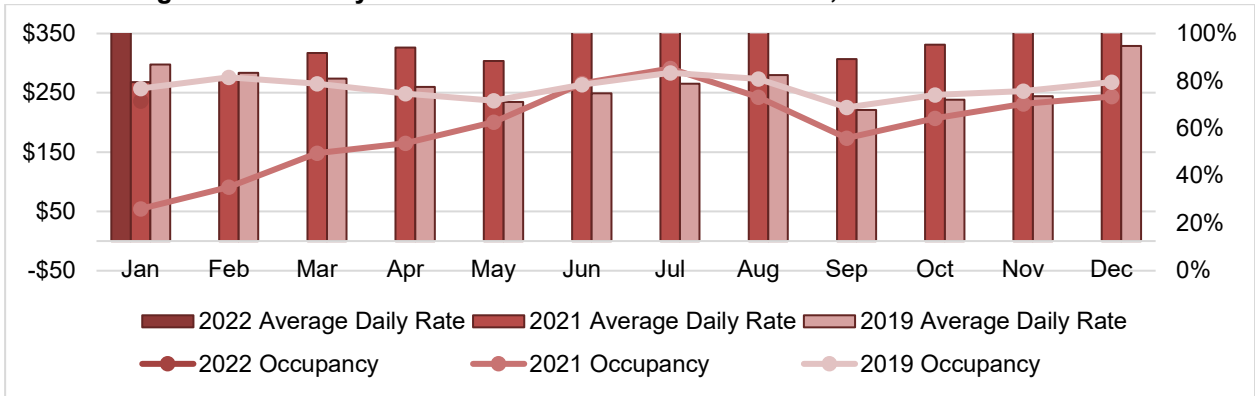
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**Figure 10: Monthly Maui County Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



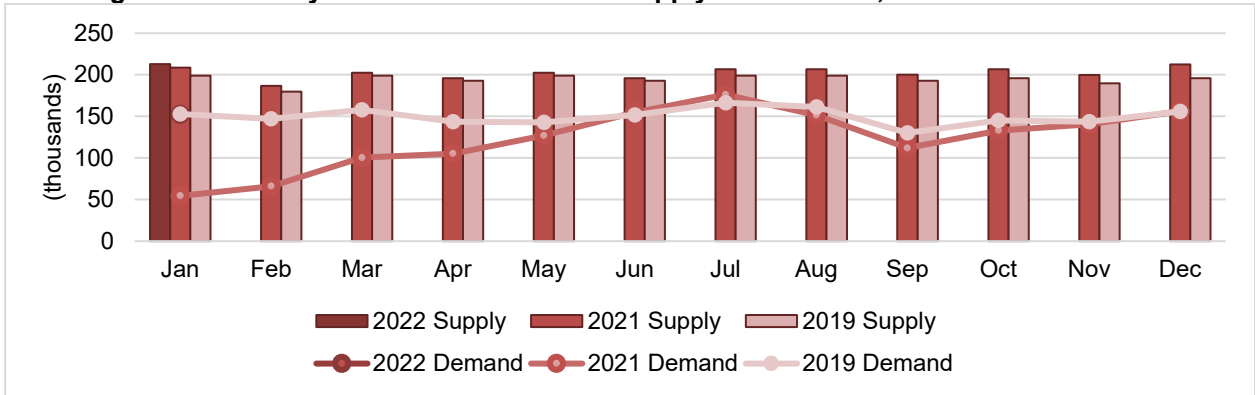
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**Figure 11: Monthly Island of Hawai'i Hotel Performance, 2022 vs. 2021 vs. 2019**



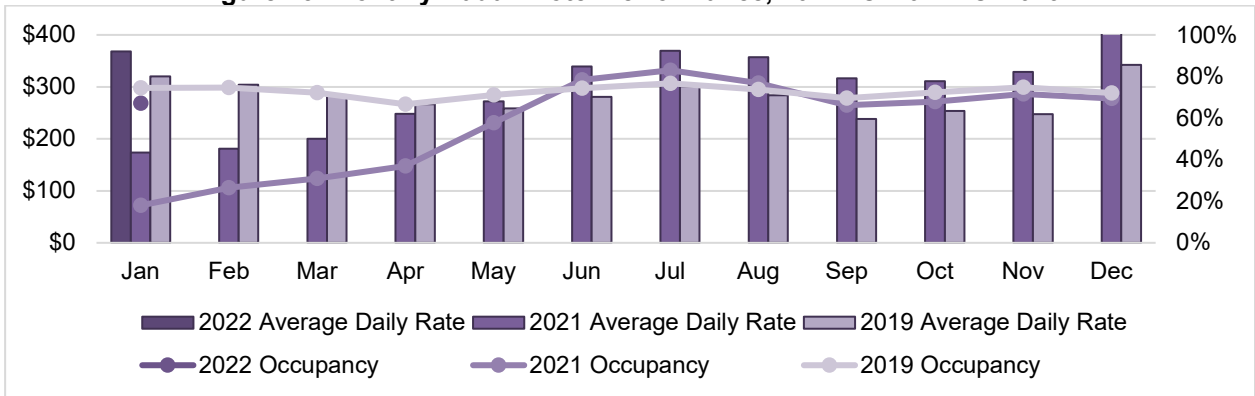
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**Figure 12: Monthly Island of Hawai'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



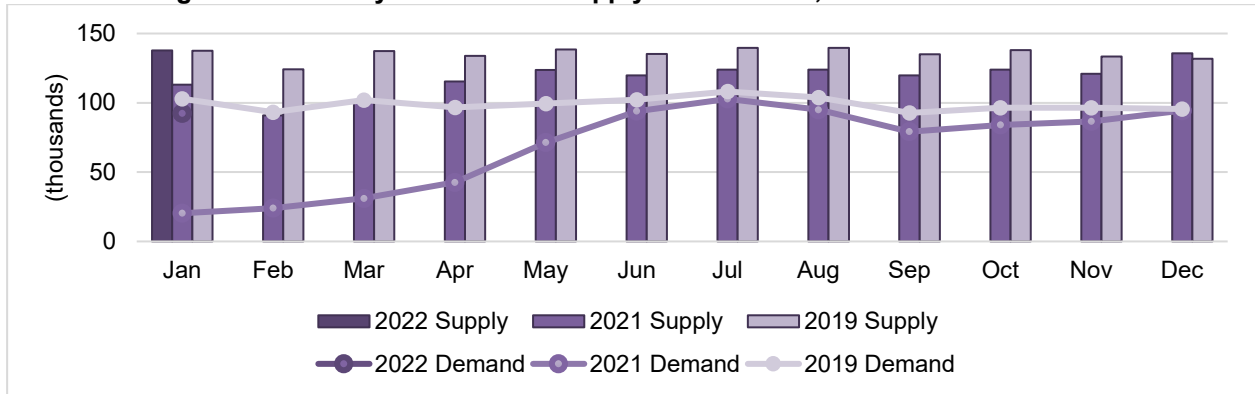
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**Figure 13: Monthly Kaua'i Hotel Performance, 2022 vs. 2021 vs. 2019**



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

**Figure 14: Monthly Kaua'i Hotel Supply and Demand, 2022 vs. 2021 vs. 2019**



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