



January 2019 Hawai'i Hotel Performance Report

In January 2019, Hawai'i hotels statewide reported a small increase in average daily rate (ADR) but a decrease in occupancy resulted in lower revenue per available room (RevPAR) compared to January 2018.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority (HTA), statewide RevPAR declined to \$238 (-2.2%), ADR rose to \$299 (+1.3%), and occupancy declined to 79.5 percent (-2.8 percentage points) (Figure 1) in January.

HTA's Tourism Research Division issued the report's findings utilizing data compiled by STR, Inc., which conducts the largest and most comprehensive survey of hotel properties in the Hawaiian Islands.

In January, Hawai'i hotel room revenues fell by 3.6 percent to \$391.4 million, with nearly 25,000 fewer available room nights in the month compared to a year ago (Figure 2).

All classes of Hawai'i hotel properties statewide reported declines in occupancy in January. Luxury properties reported slightly lower ADR of \$607 (-0.9%), with all other price classes reporting modest ADR growth for the month.

Among Hawai'i's four island counties, only hotel properties on O'ahu reported growth in RevPAR in January. O'ahu hotels earned an increase in RevPAR to \$200 (+0.7%), with growth in ADR to \$243 (+1.4%) and lower occupancy of 82.6 percent (-0.5 percentage points).

Maui County hotels led the state overall in RevPAR despite a decrease to \$327 (-5.5%) in January. In addition, both ADR at \$434 (-0.4%) and occupancy of 75.3 percent (-4.1 percentage points) declined year-over-year.

Kaua'i hotels' RevPAR declined to \$241 (-3.9%) in January, with the increase in ADR to \$322 (+6.2%) offset by lower occupancy of 74.9 percent (-7.9 percentage points).

Hotels on the island of Hawai'i reported a decline in RevPAR to \$229 (-3.7%) in January, as a decrease in occupancy to 76.8 percent (-7.0 percentage points) offset the increase in ADR to \$298 (+5.1%).

Among Hawai'i's resort regions, Waikīkī and the Kohala Coast reported RevPAR in January similar to a year ago, while the Wailea and Lahaina/Kā'anapali/Kapalua regions reported losses for the month.

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 January 2019, the survey included 164 properties representing 47,853 rooms, or 90.0 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels.

Figure 1: Hawai'i Hotel Performance January 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	79.5%	82.3%	-2.8%	\$298.85	\$295.03	1.3%	\$237.56	\$242.80	-2.2%
Luxury Class	73.4%	77.4%	-4.0%	\$606.84	\$612.14	-0.9%	\$445.16	\$473.70	-6.0%
Upper Upscale Class	82.4%	84.7%	-2.3%	\$293.83	\$285.47	2.9%	\$242.04	\$241.79	0.1%
Upscale Class	75.3%	78.5%	-3.2%	\$225.80	\$218.68	3.3%	\$169.96	\$171.62	-1.0%
Upper Midscale Class	83.0%	84.3%	-1.3%	\$165.75	\$162.15	2.2%	\$137.63	\$136.68	0.7%
Midscale & Economy Class	82.3%	87.5%	-5.2%	\$196.92	\$189.02	4.2%	\$162.04	\$165.32	-2.0%
O'ahu	82.6%	83.1%	-0.5%	\$242.70	\$239.45	1.4%	\$200.38	\$199.01	0.7%
Waikiki	83.1%	84.0%	-0.9%	\$238.27	\$235.53	1.2%	\$197.98	\$197.88	0.1%
Other O'ahu	79.5%	77.7%	1.7%	\$269.76	\$264.61	1.9%	\$214.44	\$205.73	4.2%
O'ahu Luxury	68.6%	70.0%	-1.4%	\$527.69	\$524.59	0.6%	\$362.02	\$367.26	-1.4%
O'ahu Upper Upscale	85.0%	85.6%	-0.6%	\$263.62	\$261.01	1.0%	\$224.07	\$223.48	0.3%
O'ahu Upscale	80.9%	79.7%	1.2%	\$190.61	\$189.23	0.7%	\$154.20	\$150.78	2.3%
O'ahu Upper Midscale	83.7%	84.2%	-0.6%	\$155.20	\$152.43	1.8%	\$129.85	\$128.39	1.1%
O'ahu Midscale & Economy	86.1%	89.4%	-3.4%	\$136.30	\$136.52	-0.2%	\$117.30	\$122.11	-3.9%
Maui County	75.3%	79.4%	-4.1%	\$434.21	\$436.03	-0.4%	\$327.04	\$346.22	-5.5%
Wailea	84.0%	86.3%	-2.3%	\$632.38	\$662.03	-4.5%	\$531.34	\$571.53	-7.0%
Lahaina/Kā'anapali/Kapalua	74.0%	79.5%	-5.4%	\$371.00	\$357.36	3.8%	\$274.62	\$283.95	-3.3%
Other Maui County	77.0%	79.3%	-2.4%	\$511.81	\$535.73	-4.5%	\$393.97	\$425.03	-7.3%
Maui County Luxury	75.8%	78.6%	-2.7%	\$706.12	\$741.23	-4.7%	\$535.31	\$582.24	-8.1%
Maui County Upper Upscale & Upscale	75.3%	80.2%	-4.9%	\$347.34	\$337.98	2.8%	\$261.57	\$270.94	-3.5%
Island of Hawai'i	76.8%	83.7%	-7.0%	\$298.30	\$283.92	5.1%	\$228.97	\$237.73	-3.7%
Kohala Coast	76.3%	79.7%	-3.4%	\$423.41	\$407.10	4.0%	\$323.15	\$324.35	-0.4%
Kaua'i	74.9%	82.8%	-7.9%	\$321.61	\$302.90	6.2%	\$240.93	\$250.82	-3.9%

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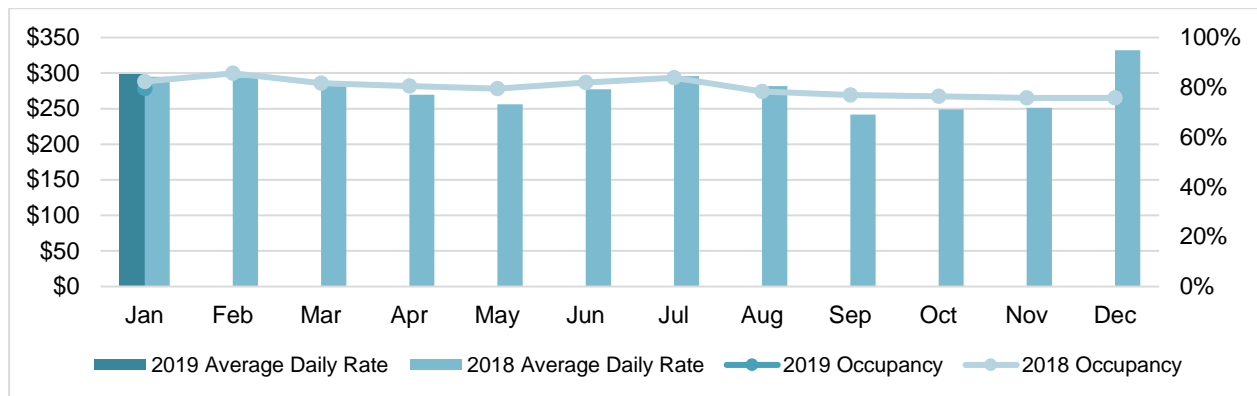
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

Figure 2: Hawai'i Hotel Performance by Measure January 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,647.6	1,672.3	-1.5%	1,309.6	1,376.2	-4.8%	391.4	406.0	-3.6%
O'ahu	916.4	927.3	-1.2%	756.6	770.7	-1.8%	183.6	184.6	-0.5%
Waikiki	782.7	793.6	-1.4%	650.3	666.8	-2.5%	155.0	157.0	-1.3%
Maui County	394.6	392.6	0.5%	297.2	311.8	-4.7%	129.0	135.9	-5.1%
Wailea	68.0	68.0	0.0%	57.1	58.7	-2.7%	36.1	38.9	-7.0%
Lahaina/Kā'anapali/ Kapalua	221.3	219.3	0.9%	163.8	174.3	-6.0%	60.8	62.3	-2.4%
Island of Hawai'i	199.1	216.4	-8.0%	152.8	181.2	-15.7%	45.6	51.5	-11.4%
Kohala Coast	93.0	103.6	-10.2%	71.0	82.5	-14.0%	30.1	33.6	-10.5%
Kaua'i	137.5	135.8	1.2%	103.0	112.5	-8.4%	33.1	34.1	-2.8%

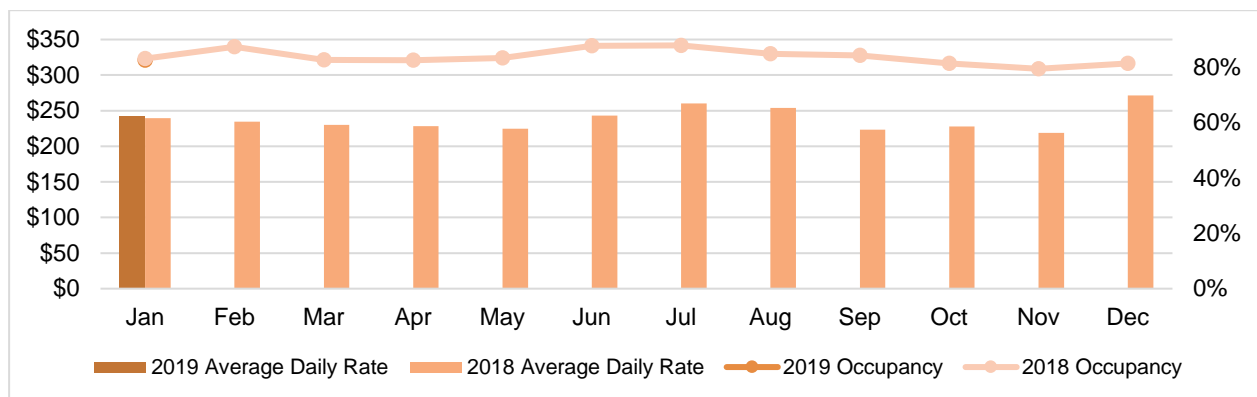
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Figure 3: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



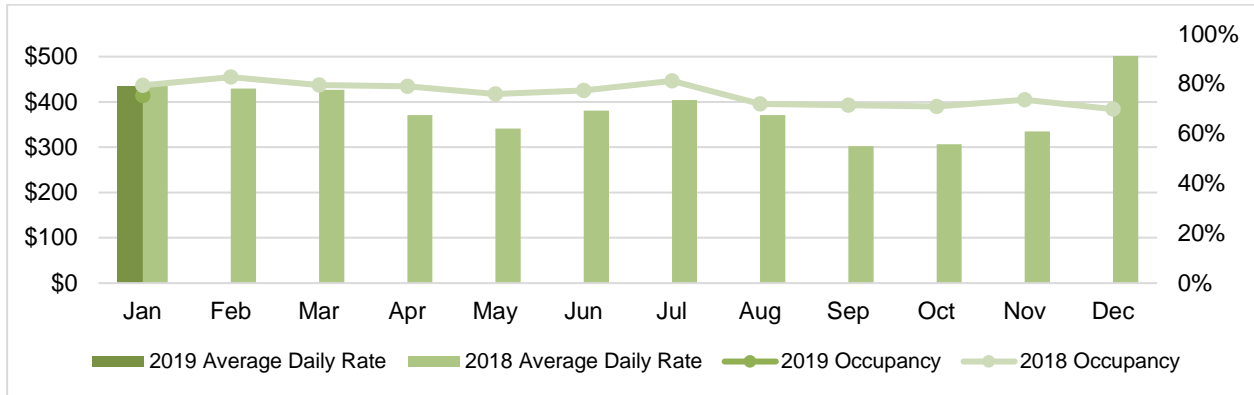
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Figure 4: Monthly O'ahu Hotel Performance, 2019 vs. 2018



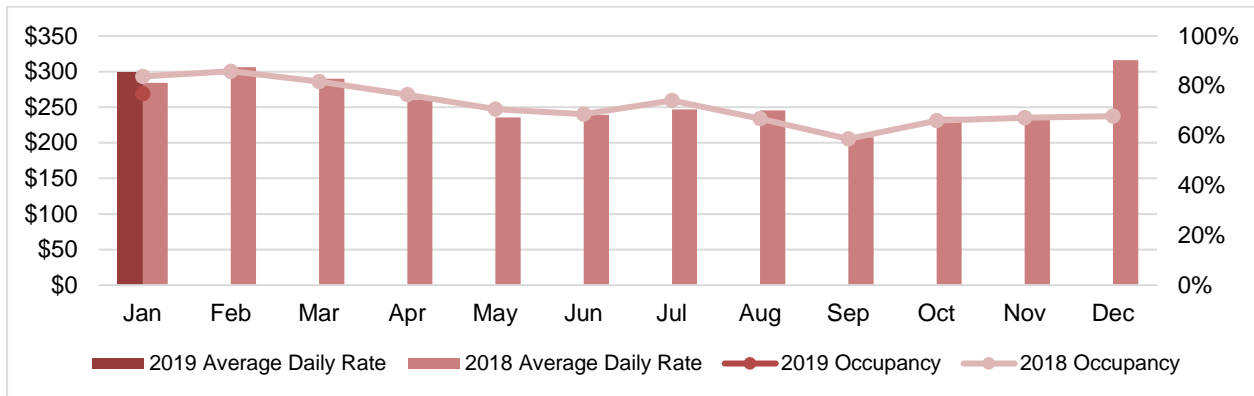
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Figure 5: Monthly Maui County Hotel Performance, 2019 vs. 2018



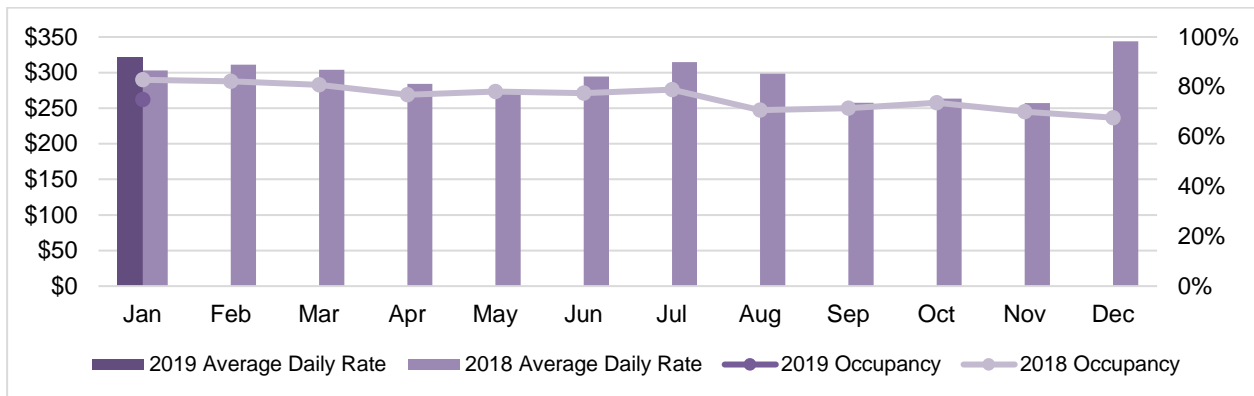
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Figure 6: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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Figure 7: Monthly Kaua'i Hotel Performance, 2019 vs. 2018



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