



April 2019 Hawaii Hotel Performance Report

In April 2019, Hawaii hotels statewide reported lower revenue per available room (RevPAR), with higher average daily rate (ADR) and lower occupancy compared to April 2018.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR declined to \$215 (-0.9%), with ADR of \$275 (+2.3%) and occupancy of 78.4 percent (-2.5 percentage points) (Figure 1) in April.

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 April, Hawaii hotel room revenues fell by 2.4 percent to \$349 million. There were more than 25,000 fewer available room nights (-1.5%) in April and nearly 61,000 fewer occupied room nights (-4.6%) compared to a year ago (Figure 2). Several hotel properties across the state were closed for renovation or had rooms out of service for renovation during April.¹

Among the classes of Hawaii hotel properties statewide, only Luxury Class and Upper Midscale Class properties reported RevPAR gains in April. Luxury Class properties reported RevPAR of \$422 (+1.7%) with ADR of \$548 (+0.4%) and occupancy of 77.0 percent (+1.0 percentage points). Upper Midscale Class hotels reported RevPAR of \$124 (+2.2%) with ADR of \$153 (+1.5%) and occupancy of 81.3 percent (+0.6 percentage points).

Among Hawaii's four island counties, Maui County hotels led the state in RevPAR (\$307, +3.0%) in April. ADR grew to \$390 (+3.4%) and occupancy was similar to last year (78.7%, -0.3 percentage points). Maui County was boosted by the strong performance of properties in Wailea, which were 91.3 percent occupied (+1.9 percentage points) with ADR of \$601 (+4.5%).

Kauai hotels' RevPAR fell to \$201 (-8.1%) in April, with flat ADR of \$278 (-0.2%) and lower occupancy of 72.3 percent (-6.3 percentage points).

Hotels on the island of Hawaii reported a drop in RevPAR to \$197 (-4.0%) in April, with growth in ADR (\$264, +1.5%) unable to offset lower occupancy (74.6%, -4.2 percentage points).

Oahu hotels reported lower RevPAR in April (\$183, -1.9%) compared to a year ago. Growth in ADR to \$229 (+1.2%) was counter-balanced by a 2.5 percentage point decrease in occupancy to 79.9 percent.

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

¹ Properties report rooms as officially out of service to STR if they are unavailable for rent for 30 days or more. However, it should be noted that rooms out of service for renovation for less than 30 days are still included in the Supply numbers presented in Figures 2 and 4 and may be considered overstated.

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 April 2019, the survey included 161 properties representing 48,442 rooms, or 89.7 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 April 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	78.4%	80.9%	-2.5%	\$274.80	\$268.61	2.3%	\$215.41	\$217.29	-0.9%
Luxury Class	77.0%	76.1%	1.0%	\$548.14	\$546.01	0.4%	\$422.21	\$415.33	1.7%
Upper Upscale Class	80.1%	84.3%	-4.1%	\$275.37	\$264.02	4.3%	\$220.69	\$222.53	-0.8%
Upscale Class	73.8%	76.8%	-3.0%	\$206.62	\$203.27	1.6%	\$152.47	\$156.09	-2.3%
Upper Midscale Class	81.3%	80.7%	0.6%	\$152.95	\$150.73	1.5%	\$124.30	\$121.63	2.2%
Midscale & Economy Class	79.3%	84.7%	-5.4%	\$155.49	\$169.64	-8.3%	\$123.37	\$143.70	-14.1%
O'ahu	79.9%	82.5%	-2.5%	\$229.08	\$226.29	1.2%	\$183.13	\$186.64	-1.9%
Waikiki	80.0%	82.9%	-2.9%	\$223.52	\$220.29	1.5%	\$178.84	\$182.63	-2.1%
Other O'ahu	79.5%	79.9%	-0.4%	\$262.88	\$264.39	-0.6%	\$209.04	\$211.18	-1.0%
O'ahu Luxury	68.9%	68.1%	0.8%	\$479.91	\$481.83	-0.4%	\$330.66	\$328.23	0.7%
O'ahu Upper Upscale	81.4%	87.4%	-6.0%	\$252.86	\$248.10	1.9%	\$205.72	\$216.74	-5.1%
O'ahu Upscale	78.1%	77.3%	0.8%	\$186.70	\$187.58	-0.5%	\$145.76	\$144.96	0.6%
O'ahu Upper Midscale	81.7%	80.8%	0.9%	\$148.87	\$145.68	2.2%	\$121.68	\$117.73	3.4%
O'ahu Midscale & Economy	84.1%	87.1%	-3.0%	\$126.36	\$131.24	-3.7%	\$106.27	\$114.31	-7.0%
Maui County	78.7%	79.0%	-0.3%	\$389.77	\$377.02	3.4%	\$306.84	\$297.87	3.0%
Wailea	91.3%	89.4%	1.9%	\$600.56	\$574.64	4.5%	\$548.45	\$513.64	6.8%
Lahaina/Kā'anapali/Kapalua	76.8%	77.0%	-0.2%	\$326.77	\$317.71	2.9%	\$250.88	\$244.59	2.6%
Other Maui County	81.2%	81.6%	-0.4%	\$465.80	\$447.87	4.0%	\$378.26	\$365.30	3.5%
Maui County Luxury	85.0%	80.2%	4.9%	\$636.84	\$639.10	-0.4%	\$541.59	\$512.45	5.7%
Maui County Upper Upscale & Upscale	78.2%	79.5%	-1.3%	\$314.59	\$294.60	6.8%	\$245.94	\$234.27	5.0%
Island of Hawai'i	74.6%	78.8%	-4.2%	\$264.21	\$260.36	1.5%	\$197.13	\$205.26	-4.0%
Kohala Coast	76.5%	72.3%	4.2%	\$374.36	\$379.63	-1.4%	\$286.37	\$274.60	4.3%
Kaua'i	72.3%	78.6%	-6.3%	\$277.64	\$278.09	-0.2%	\$200.67	\$218.46	-8.1%

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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 April 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,619.8	1,644.9	-1.5%	1,269.7	1,330.7	-4.6%	348.9	357.4	-2.4%
O'ahu	911.3	921.8	-1.1%	728.6	760.3	-4.2%	166.9	172.0	-3.0%
Waikiki	782.0	792.4	-1.3%	625.7	656.9	-4.8%	139.8	144.7	-3.4%
Maui County	381.8	380.0	0.5%	300.6	300.2	0.1%	117.2	113.2	3.5%
Wailea	65.8	65.8	0.0%	60.1	58.8	2.2%	36.1	33.8	6.8%
Lahaina/Kā'anapali/Kapalua	214.1	212.3	0.9%	164.4	163.4	0.6%	53.7	51.9	3.5%
Island of Hawai'i	192.7	209.5	-8.0%	143.8	165.1	-12.9%	38.0	43.0	-11.7%
Kohala Coast	90.0	100.2	-10.2%	68.8	72.5	-5.0%	25.8	27.5	-6.4%
Kaua'i	133.9	133.7	0.1%	96.8	105.1	-7.9%	26.9	29.2	-8.0%

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Figure 3: Hawai'i Hotel Performance Year-to-Date April 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	80.2%	82.9%	-2.6%	\$286.41	\$284.82	0.6%	\$229.79	\$236.00	-2.6%
Luxury Class	76.3%	78.6%	-2.3%	\$581.66	\$588.20	-1.1%	\$443.85	\$462.12	-4.0%
Upper Upscale Class	82.3%	85.7%	-3.5%	\$283.19	\$277.40	2.1%	\$233.02	\$237.85	-2.0%
Upscale Class	76.1%	78.8%	-2.7%	\$217.94	\$213.91	1.9%	\$165.83	\$168.58	-1.6%
Upper Midscale Class	83.8%	83.6%	0.2%	\$158.70	\$156.74	1.2%	\$132.91	\$131.03	1.4%
Midscale & Economy Class	82.2%	86.5%	-4.3%	\$179.25	\$183.35	-2.2%	\$147.34	\$158.54	-7.1%
O'ahu	82.3%	83.9%	-1.6%	\$233.13	\$230.88	1.0%	\$191.78	\$193.73	-1.0%
Waikiki	82.4%	84.6%	-2.1%	\$227.95	\$225.64	1.0%	\$187.93	\$190.84	-1.5%
Other O'ahu	81.2%	79.8%	1.4%	\$264.93	\$264.92	0.0%	\$215.05	\$211.41	1.7%
O'ahu Luxury	69.9%	70.5%	-0.6%	\$493.31	\$498.25	-1.0%	\$344.79	\$351.28	-1.8%
O'ahu Upper Upscale	83.7%	87.4%	-3.7%	\$255.61	\$252.61	1.2%	\$214.01	\$220.91	-3.1%
O'ahu Upscale	80.8%	79.6%	1.2%	\$190.09	\$188.98	0.6%	\$153.55	\$150.47	2.0%
O'ahu Upper Midscale	84.2%	83.8%	0.4%	\$153.26	\$150.21	2.0%	\$129.04	\$125.89	2.5%
O'ahu Midscale & Economy	86.6%	89.0%	-2.4%	\$134.12	\$134.96	-0.6%	\$116.15	\$120.11	-3.3%
Maui County	78.6%	79.9%	-1.2%	\$418.65	\$418.43	0.1%	\$329.26	\$334.16	-1.5%
Wailea	89.4%	88.8%	0.7%	\$635.34	\$638.34	-0.5%	\$568.09	\$566.62	0.3%
Lahaina/Kā'anapali/Kapalua	77.2%	79.1%	-1.9%	\$351.72	\$347.58	1.2%	\$271.49	\$274.99	-1.3%
Other Maui County	80.5%	80.8%	-0.3%	\$500.55	\$506.23	-1.1%	\$403.00	\$409.03	-1.5%
Maui County Luxury	82.1%	80.8%	1.2%	\$690.90	\$706.42	-2.2%	\$567.00	\$571.14	-0.7%
Maui County Upper Upscale & Upscale	78.5%	80.3%	-1.8%	\$334.47	\$327.65	2.1%	\$262.43	\$263.08	-0.2%
Island of Hawai'i	78.0%	84.1%	-6.1%	\$279.80	\$283.45	-1.3%	\$218.16	\$238.29	-8.4%
Kohala Coast	78.6%	80.3%	-1.6%	\$394.50	\$407.01	-3.1%	\$310.13	\$326.66	-5.1%
Kaua'i	74.2%	82.2%	-8.0%	\$298.68	\$297.86	0.3%	\$221.61	\$244.91	-9.5%

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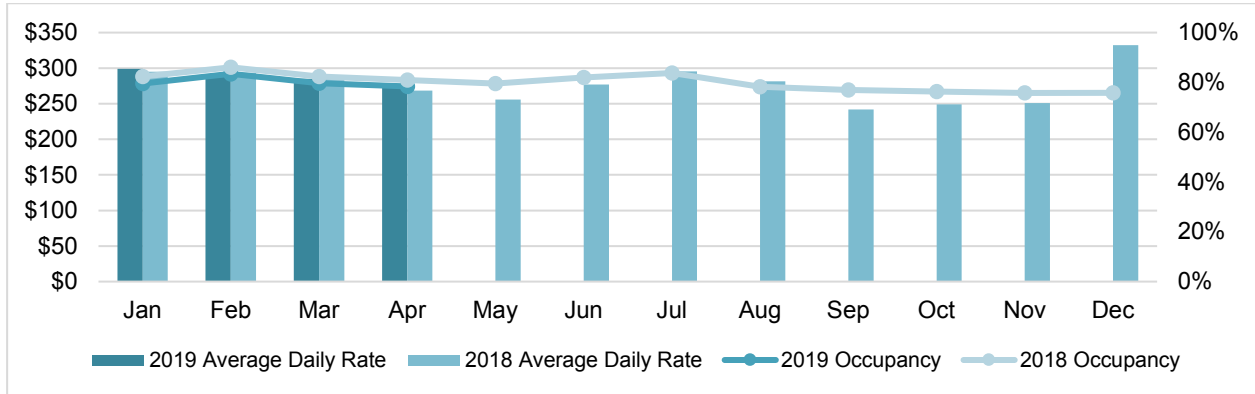
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date April 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	6,480.2	6,575.7	-1.5%	5,199.2	5,448.4	-4.6%	1,489.1	1,551.8	-4.0%
O'ahu	3,645.4	3,687.4	-1.1%	2,998.8	3,094.0	-3.1%	699.1	714.4	-2.1%
Waikiki	3,127.8	3,169.9	-1.3%	2,578.7	2,681.0	-3.8%	587.8	604.9	-2.8%
Maui County	1,527.3	1,519.9	0.5%	1,201.2	1,213.8	-1.0%	502.9	507.9	-1.0%
Wailea	263.3	263.3	0.0%	235.4	233.7	0.7%	149.6	149.2	0.3%
Lahaina/Kā'anapali/Kapalua	856.4	849.0	0.9%	661.0	671.7	-1.6%	232.5	233.5	-0.4%
Island of Hawai'i	770.8	837.8	-8.0%	601.0	704.3	-14.7%	168.2	199.6	-15.8%
Kohala Coast	360.0	400.9	-10.2%	283.0	321.8	-12.0%	111.6	131.0	-14.8%
Kaua'i	536.7	530.5	1.2%	398.3	436.2	-8.7%	118.9	129.9	-8.5%

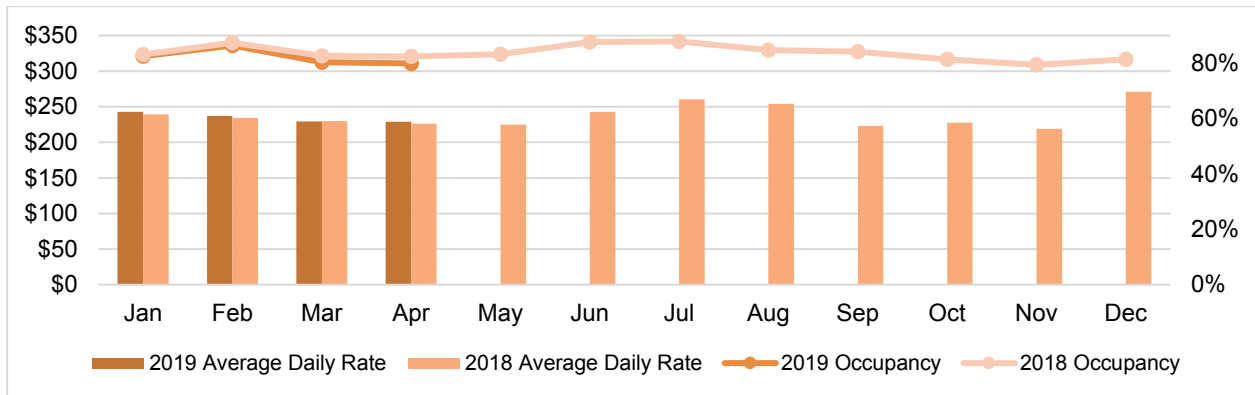
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



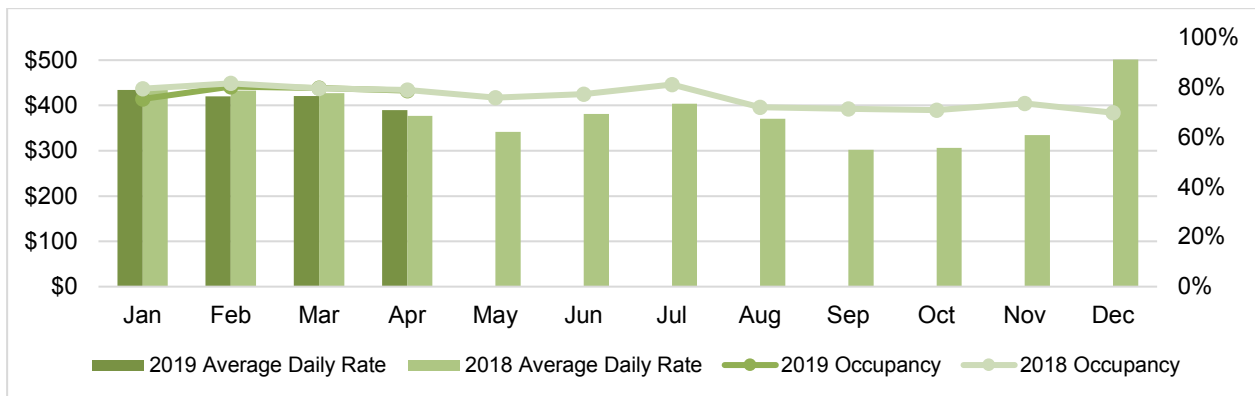
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



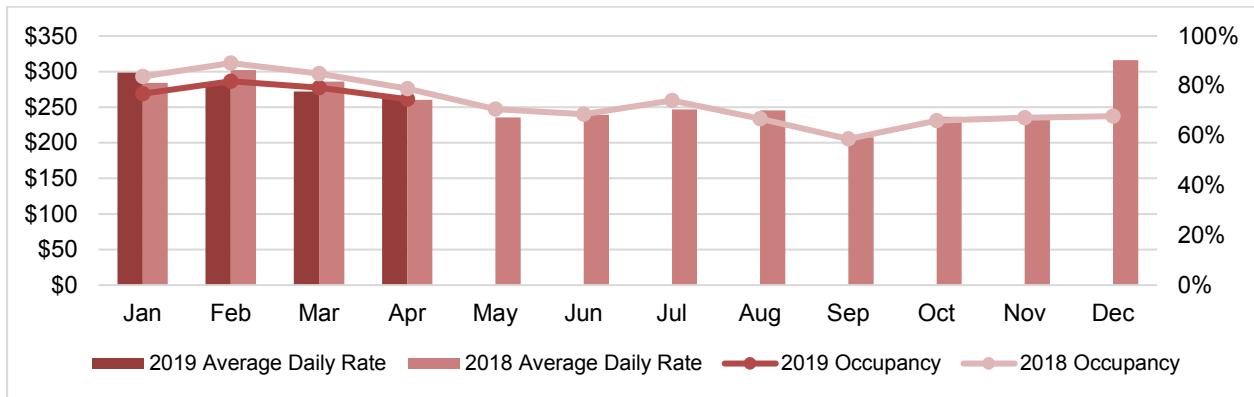
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



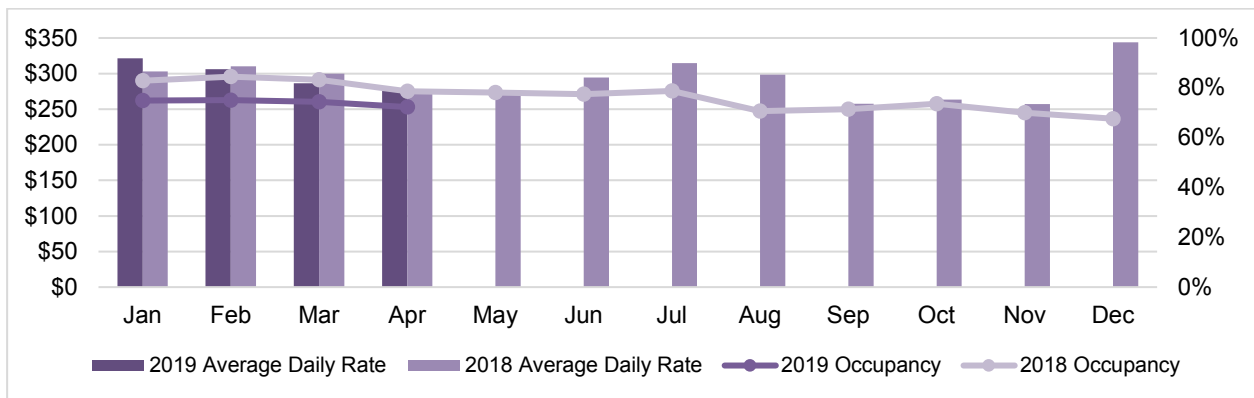
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



Source: STR, Inc. © Copyright 2019 Hawai'i Tourism Authority.

Figure 9: Monthly Kaua'i Hotel Performance, 2019 vs. 2018



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