



July 2019 Hawai'i Hotel Performance Report

In July 2019, Hawai'i hotels statewide reported growth in revenue per available room (RevPAR), average daily rate (ADR) and occupancy compared to July 2018. Contributing to this growth, hotels on the island of Hawai'i reported significant gains, continuing the trend from June 2019.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority (HTA), statewide RevPAR increased to \$260 (+5.2%), with ADR of \$305 (+3.9%) and occupancy of 85.2 percent (+1.0 percentage points) (Figure 1) in July.

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 July, Hawai'i hotel room revenues grew by 3.5 percent to \$434.8 million, approximately \$14.6 million higher than last year. There were approximately 27,700 fewer available room nights (-1.6%) in July with room demand similar to 2018 (Figure 2). Several hotel properties across the state were closed for renovation or had rooms out of service for renovation during July.¹

All classes of Hawai'i hotel properties statewide reported RevPAR gains for the month of July 2019. Luxury Class properties reported a strong increase in RevPAR to \$506 (+11.0%) with ADR of \$603 (+3.7%) and occupancy of 83.9 percent (+5.5 percentage points). Midscale & Economy Class hotels reported RevPAR of \$155 (+1.7%) with ADR of \$183 (+0.4%) and occupancy of 84.3 percent (+1.0 percentage points).

Among Hawai'i's four island counties, Maui County hotels led the state in RevPAR at \$359 (+9.3%), ADR of \$436 (+7.7%) and occupancy of 82.2 percent (+1.2 percentage points). Maui County was led by the strong performance of properties in Wailea, which earned RevPAR of \$640 (+13.6%), ADR of \$697 (+12.2%), and 91.7 percent occupancy (+1.1 percentage points).

O'ahu hotels reported higher RevPAR in July of \$230 (+1.4%) compared to a year ago, with growth in ADR to \$261 (+1.3%) and occupancy that was similar to last year at 87.9 percent (+0.1 percentage points). Waikīkī hotels performed similarly to last July.

Hotels on the island of Hawai'i saw increases in RevPAR to \$223 (+19.0%), ADR of \$266 (+9.1%) and occupancy at 83.6 percent (+7.0 percentage points) in July compared to the same time last year. Most notably, Kohala Coast hotels had a 30 percent increase in RevPAR to \$324 compared to last July, along with strong growth in ADR to \$376 (+10.7%) and occupancy of 86.3 percent (+12.8 percentage points). In May 2018, Kīlauea volcano started erupting in lower Puna, which contributed to a downturn in visitors to the island of Hawai'i in the following months.

Kaua'i hotels reported lower performance compared to last July with decreases in RevPAR to \$233 (-5.7%), ADR of \$301 (-3.0%) and occupancy of 77.5 percent (-2.2 percentage points).

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.

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 July 2019, the survey included 159 properties representing 48,092 rooms, or 89.0 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 July 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	85.2%	84.1%	1.0%	\$304.73	\$293.19	3.9%	\$259.52	\$246.70	5.2%
Luxury Class	83.9%	78.4%	5.5%	\$602.91	\$581.18	3.7%	\$505.75	\$455.76	11.0%
Upper Upscale Class	87.7%	88.0%	-0.4%	\$308.12	\$295.89	4.1%	\$270.10	\$260.52	3.7%
Upscale Class	80.3%	79.9%	0.3%	\$216.38	\$212.13	2.0%	\$173.65	\$169.60	2.4%
Upper Midscale Class	87.3%	86.4%	0.9%	\$176.30	\$175.30	0.6%	\$153.95	\$151.45	1.7%
Midscale & Economy Class	84.3%	83.2%	1.0%	\$183.40	\$182.61	0.4%	\$154.55	\$151.99	1.7%
O'ahu	87.9%	87.8%	0.1%	\$261.30	\$257.96	1.3%	\$229.57	\$226.45	1.4%
Waikiki	87.7%	87.8%	-0.1%	\$254.01	\$252.40	0.6%	\$222.69	\$221.60	0.5%
Other O'ahu	89.0%	87.7%	1.3%	\$304.66	\$292.07	4.3%	\$271.17	\$256.16	5.9%
O'ahu Luxury	82.4%	76.0%	6.4%	\$529.34	\$523.01	1.2%	\$435.97	\$397.45	9.7%
O'ahu Upper Upscale	88.7%	91.0%	-2.3%	\$285.96	\$283.82	0.8%	\$253.54	\$258.24	-1.8%
O'ahu Upscale	87.7%	86.0%	1.7%	\$208.51	\$208.76	-0.1%	\$182.84	\$179.53	1.8%
O'ahu Upper Midscale	87.9%	87.0%	0.9%	\$172.53	\$172.12	0.2%	\$151.60	\$149.70	1.3%
O'ahu Midscale & Economy	90.6%	88.9%	1.7%	\$151.23	\$158.34	-4.5%	\$137.00	\$140.80	-2.7%
Maui County	82.2%	81.1%	1.2%	\$436.41	\$405.20	7.7%	\$358.91	\$328.42	9.3%
Wailea	91.7%	90.6%	1.1%	\$697.21	\$621.26	12.2%	\$639.54	\$562.74	13.6%
Lahaina/Kā'anapali/Kapalua	82.2%	82.0%	0.2%	\$361.15	\$345.64	4.5%	\$296.95	\$283.39	4.8%
Other Maui County	82.3%	79.9%	2.4%	\$532.42	\$482.58	10.3%	\$438.00	\$385.40	13.6%
Maui County Luxury	88.0%	84.3%	3.7%	\$719.81	\$681.89	5.6%	\$633.17	\$574.69	10.2%
Maui County Upper Upscale & Upscale	81.9%	81.7%	0.2%	\$344.58	\$316.99	8.7%	\$282.14	\$258.93	9.0%
Island of Hawai'i	83.6%	76.6%	7.0%	\$266.22	\$244.04	9.1%	\$222.59	\$186.98	19.0%
Kohala Coast	86.3%	73.5%	12.8%	\$376.00	\$339.52	10.7%	\$324.39	\$249.62	30.0%
Kaua'i	77.5%	79.7%	-2.2%	\$301.28	\$310.74	-3.0%	\$233.40	\$247.61	-5.7%

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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 July 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,675.2	1,703.0	-1.6%	1,426.7	1,432.9	-0.4%	434.8	420.1	3.5%
O'ahu	942.0	952.7	-1.1%	827.6	836.4	-1.0%	216.3	215.7	0.2%
Waikiki	808.3	819.0	-1.3%	708.6	719.1	-1.5%	180.0	181.5	-0.8%
Maui County	394.5	392.6	0.5%	324.5	318.2	2.0%	141.6	129.0	9.8%
Wailea	68.0	68.0	0.0%	62.4	61.6	1.3%	43.5	38.3	13.6%
Lahaina/Kā'anapali/Kapalua	221.2	219.3	0.9%	181.9	179.8	1.2%	65.7	62.2	5.7%
Island of Hawai'i	199.1	216.4	-8.0%	166.5	165.8	0.4%	44.3	40.5	9.5%
Kohala Coast	93.0	103.6	-10.2%	80.2	76.1	5.4%	30.2	25.9	16.7%
Kaua'i	139.6	141.2	-1.1%	108.1	112.5	-3.9%	32.6	35.0	-6.8%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	81.3%	82.6%	-1.3%	\$283.78	\$279.80	1.4%	\$230.69	\$231.02	-0.1%
Luxury Class	77.5%	77.2%	0.3%	\$568.69	\$566.88	0.3%	\$440.61	\$437.39	0.7%
Upper Upscale Class	83.4%	85.8%	-2.4%	\$284.49	\$277.35	2.6%	\$237.27	\$237.92	-0.3%
Upscale Class	77.1%	78.6%	-1.5%	\$210.44	\$208.11	1.1%	\$162.16	\$163.49	-0.8%
Upper Midscale Class	85.2%	84.1%	1.1%	\$161.75	\$159.98	1.1%	\$137.81	\$134.53	2.4%
Midscale & Economy Class	82.3%	85.2%	-2.9%	\$177.34	\$179.75	-1.3%	\$145.99	\$153.23	-4.7%
O'ahu	84.0%	85.0%	-1.0%	\$237.45	\$235.23	0.9%	\$199.34	\$199.83	-0.2%
Waikiki	84.1%	85.5%	-1.4%	\$232.17	\$230.31	0.8%	\$195.34	\$196.89	-0.8%
Other O'ahu	82.8%	81.7%	1.2%	\$269.88	\$266.80	1.2%	\$223.56	\$217.84	2.6%
O'ahu Luxury	72.8%	71.1%	1.7%	\$490.93	\$493.04	-0.4%	\$357.25	\$350.34	2.0%
O'ahu Upper Upscale	85.2%	88.5%	-3.3%	\$261.36	\$258.38	1.2%	\$222.72	\$228.74	-2.6%
O'ahu Upscale	82.9%	81.7%	1.2%	\$191.85	\$193.14	-0.7%	\$159.08	\$157.84	0.8%
O'ahu Upper Midscale	85.7%	84.4%	1.3%	\$157.06	\$154.75	1.5%	\$134.63	\$130.63	3.1%
O'ahu Midscale & Economy	87.5%	89.2%	-1.8%	\$137.39	\$140.51	-2.2%	\$120.18	\$125.38	-4.1%
Maui County	79.1%	78.9%	0.2%	\$407.00	\$399.44	1.9%	\$322.02	\$315.33	2.1%
Wailea	90.0%	88.8%	1.2%	\$625.77	\$608.89	2.8%	\$562.96	\$540.45	4.2%
Lahaina/Kā'anapali/Kapalua	78.4%	78.5%	-0.1%	\$339.83	\$333.99	1.7%	\$266.38	\$262.26	1.6%
Other Maui County	80.1%	79.5%	0.6%	\$490.94	\$481.28	2.0%	\$393.05	\$382.49	2.8%
Maui County Luxury	82.9%	80.7%	2.2%	\$670.14	\$672.07	-0.3%	\$555.28	\$542.37	2.4%
Maui County Upper Upscale & Upscale	78.9%	79.3%	-0.4%	\$324.25	\$312.56	3.7%	\$255.96	\$247.95	3.2%
Island of Hawai'i	78.0%	79.5%	-1.6%	\$267.19	\$264.92	0.9%	\$208.34	\$210.68	-1.1%
Kohala Coast	78.8%	74.6%	4.2%	\$376.72	\$379.45	-0.7%	\$296.98	\$283.13	4.9%
Kaua'i	74.2%	81.2%	-7.0%	\$290.97	\$293.44	-0.8%	\$215.93	\$238.29	-9.4%

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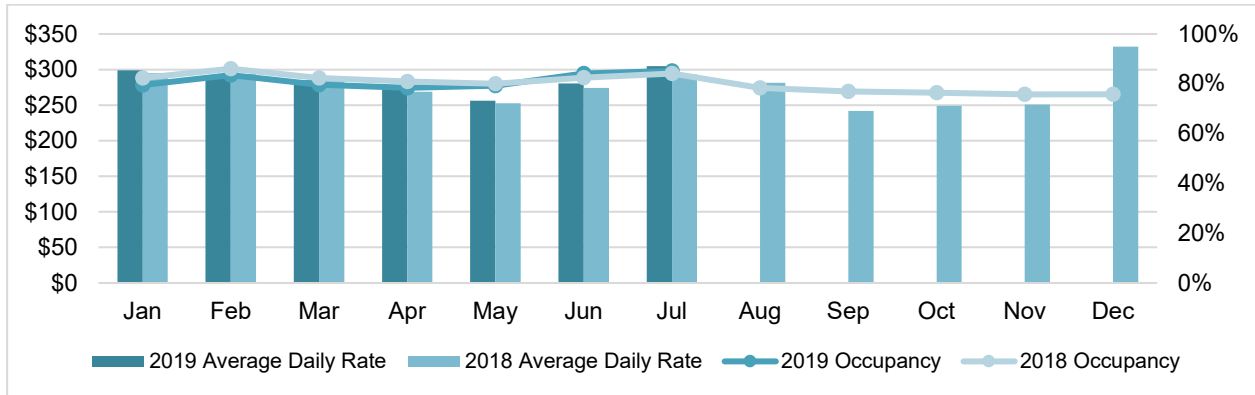
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	11,457.5	11,635.6	-1.5%	9,313.9	9,607.2	-3.1%	2,643.1	2,688.1	-1.7%
O'ahu	6,441.9	6,515.4	-1.1%	5,408.1	5,534.9	-2.3%	1,284.2	1,302.0	-1.4%
Waikiki	5,527.5	5,601.0	-1.3%	4,650.6	4,788.3	-2.9%	1,079.7	1,102.8	-2.1%
Maui County	2,698.2	2,685.2	0.5%	2,134.9	2,119.8	0.7%	868.9	846.7	2.6%
Wailea	465.1	465.1	0.0%	418.4	412.9	1.4%	261.8	251.4	4.2%
Lahaina/Kā'anapali/Kapalua	1,512.9	1,499.9	0.9%	1,185.9	1,177.8	0.7%	403.0	393.4	2.5%
Island of Hawai'i	1,361.7	1,480.2	-8.0%	1,061.7	1,177.1	-9.8%	283.7	311.8	-9.0%
Kohala Coast	636.0	708.3	-10.2%	501.4	528.5	-5.1%	188.9	200.5	-5.8%
Kaua'i	955.7	954.9	0.1%	709.2	775.4	-8.5%	206.4	227.5	-9.3%

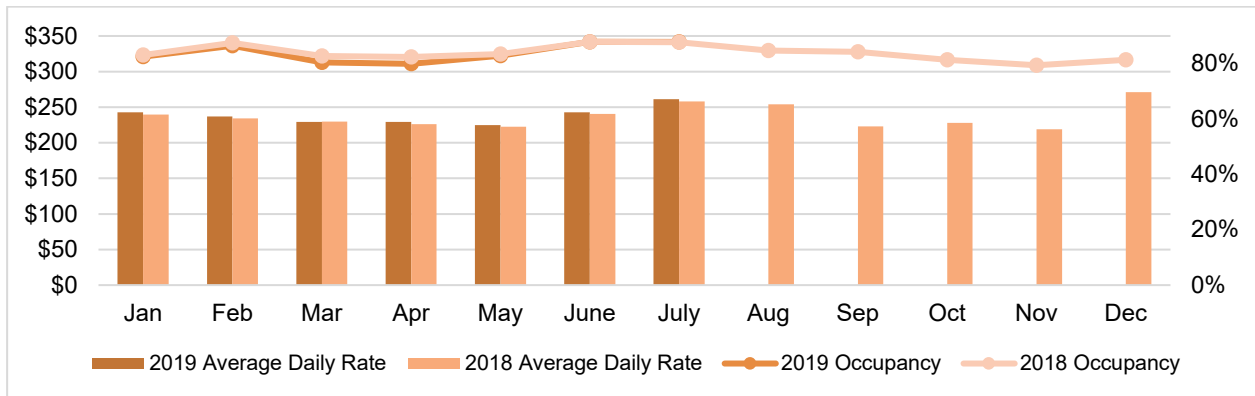
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



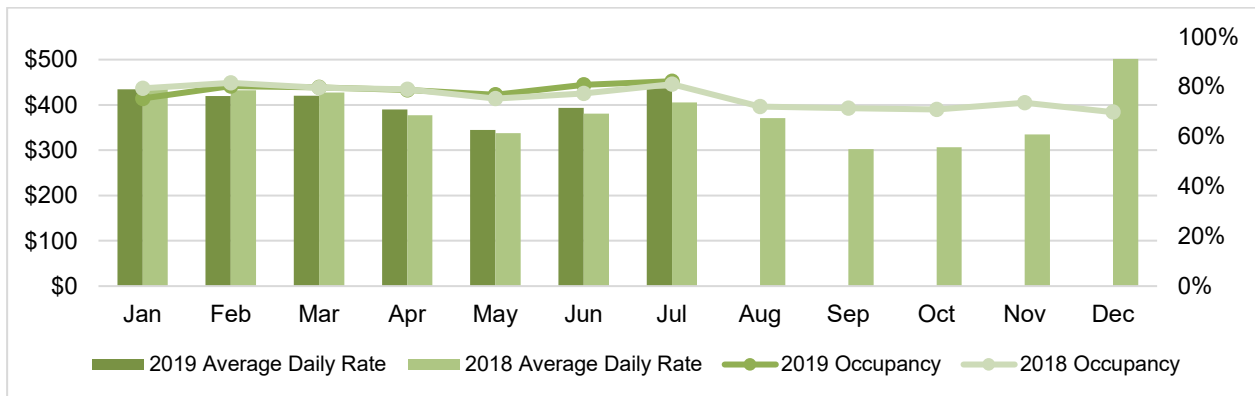
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



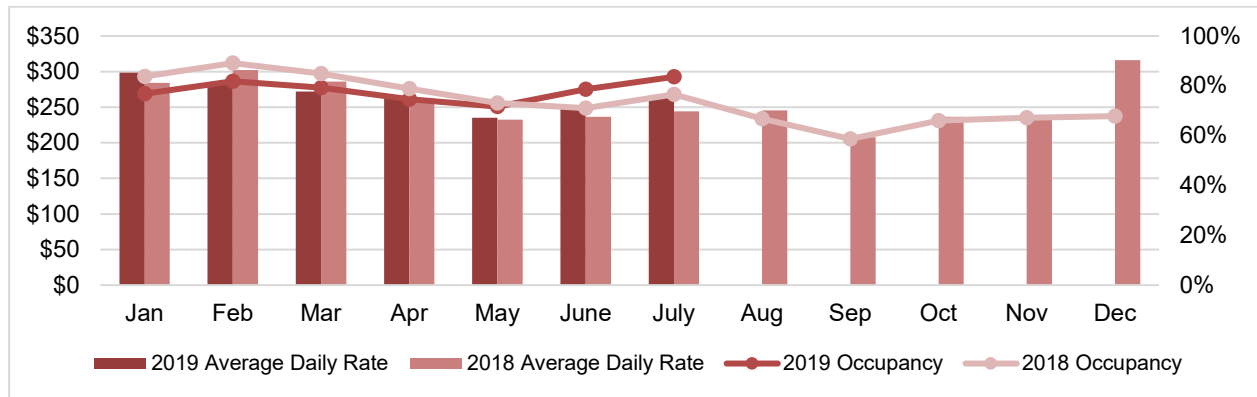
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



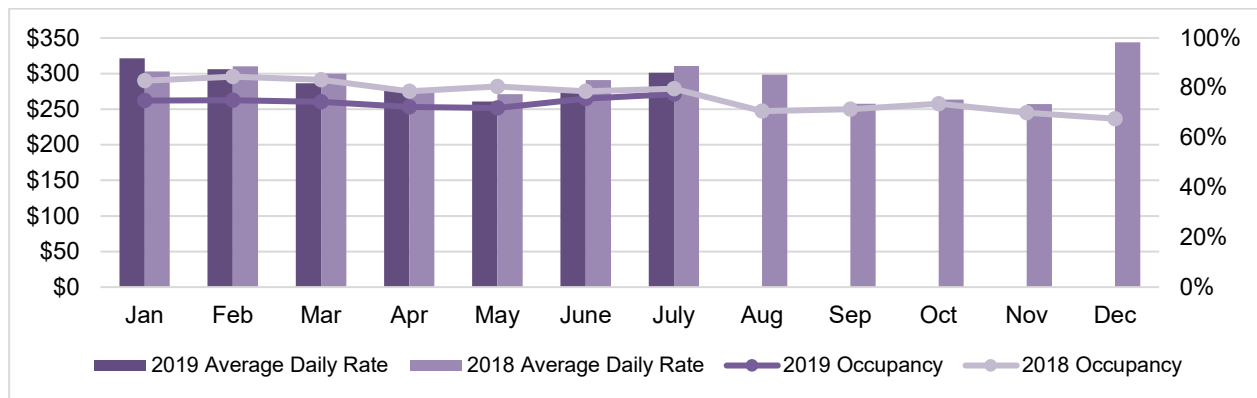
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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

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



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