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HTA Release (18-78)

## **Hawaii Tourism Authority Releases Hawaii Hotel Performance Report for October 2018**

**HONOLULU** – Hawaii hotels statewide reported no growth in revenue per available room (RevPAR), modest growth in average daily rate (ADR) and decreased occupancy in October 2018.

According to the *Hawaii Hotel Performance Report* released today by the Hawaii Tourism Authority (HTA), RevPAR was flat at \$190 (+0.3%), ADR rose to \$249 (+3.5%), and occupancy declined to 76.4 percent (-2.5 percentage points) for the month compared to a year ago (Figure 1).

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.

Jennifer Chun, HTA tourism research director, commented, "RevPAR was flat statewide in October and, for the first time this year, declined for the Midscale and Economy Class category of hotels. Maui County hotels, as well, reported a decrease in RevPAR for the first time in 2018. Hotels on the island of Hawaii continued to feel the lingering effect of Kīlauea volcano's eruption.

"Kauai hotels maintained their pattern this year of recording strong monthly increases in both RevPAR and ADR in October. On O'ahu, the American Dental Association's Annual Meeting helped to grow RevPAR for the island's hotel industry."

October's performance for hotels statewide was a combination of the RevPAR growth reported for Luxury Class, Upscale Class and Upper Midscale Class hotels offsetting the declines of Upper Upscale Class and Midscale & Economy Class hotels. Only Upscale Class hotels reported increases in both occupancy (72.7%, +1.1 percentage points) and ADR (\$197, +7.3%) in October.

Among the four counties, Kauai hotels led the state in growth of RevPAR (+7.7% to \$194) in October, which was boosted by an increase in ADR (+11.5% to \$264) to offset decreased occupancy (73.6%, -2.6 percentage points).

O'ahu hotel properties earned a small increase in RevPAR (\$185, +1.4%) in October, as growth in ADR (\$228, +2.4%) offset slightly lower occupancy (81.4%, -0.8 percentage points).

Maui County hotels led the state overall in RevPAR at \$217 in October, however, this represented a decline of 1.8 percent compared to a year ago. An increase in ADR to \$307 (+3.8%) was not enough to offset lower occupancy of 70.9% (-4.0 percentage points).

Hotels on the island of Hawaii continued to report a loss in RevPAR (\$156, -7.2%) in October. The growth in ADR (\$236, +3.3%) was offset by decreased occupancy (66.1%, -7.4 percentage points).

Among Hawaii's resort regions, Wailea on Maui led the state in RevPAR (\$383, +9.3%), ADR (\$455, +1.5%), and occupancy (84.2%, +6.0 percentage points) in October. Also on Maui, hotels in the Lahaina-Kā'anapali-Kapalua resort area reported a decline in RevPAR (\$185, -4.5%), driven by lower occupancy of (69.6%, -7.2 percentage points).

Waikīkī hotels saw RevPAR increase slightly during October (\$184, +0.5%), with modest increases in ADR (\$225, +2.7%) offsetting a small decrease in occupancy (81.7%, -1.8 percentage points).

The Kohala Coast region reported a decrease in RevPAR (\$200, -6.5%), with higher ADR (\$315, +2.4%) unable to offset declining occupancy (63.6%, -6.0 percentage points).

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Tables of hotel performance statistics, including data presented in the news release 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 October 2018, the survey included 161 properties representing 47,737 rooms, or 89.8 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels.

### **About the Hawai'i Tourism Authority**

The [Hawai'i Tourism Authority](http://www.hawaii tourism authority.org) is responsible for strategically managing the State of Hawai'i's marketing initiatives to support tourism. HTA's goal is to optimize tourism's benefits for Hawai'i, while being attentive to the interests of travelers, the community and visitor industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure the sustainability of tourism's success.

For more information about HTA, please visit [www.hawaii tourism authority.org](http://www.hawaii tourism authority.org). Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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**Figure 1: Hawai'i Hotel Performance October 2018**

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
<b>State of Hawai'i</b>	76.4%	78.8%	-2.5%	\$249.10	\$240.61	3.5%	\$190.21	\$189.66	0.3%
Luxury Class	72.1%	73.2%	-1.1%	\$459.38	\$438.30	4.8%	\$331.42	\$320.83	3.3%
Upper Upscale Class	80.2%	85.3%	-5.1%	\$253.69	\$248.91	1.9%	\$203.46	\$212.32	-4.2%
Upscale Class	72.7%	71.6%	1.1%	\$196.93	\$183.56	7.3%	\$143.26	\$131.43	9.0%
Upper Midscale Class	77.8%	78.7%	-1.0%	\$154.29	\$147.29	4.8%	\$119.99	\$115.99	3.4%
Midscale & Economy Class	72.7%	80.5%	-7.8%	\$141.07	\$141.88	-0.6%	\$102.59	\$114.23	-10.2%
<b>O'ahu</b>	81.4%	82.1%	-0.8%	\$227.73	\$222.42	2.4%	\$185.35	\$182.71	1.4%
Waikiki	81.7%	83.5%	-1.8%	\$225.50	\$219.55	2.7%	\$184.25	\$183.35	0.5%
Other O'ahu	79.5%	74.0%	5.5%	\$241.08	\$241.65	-0.2%	\$191.78	\$178.92	7.2%
O'ahu Luxury	71.0%	72.7%	-1.7%	\$445.21	\$445.69	-0.1%	\$316.12	\$324.14	-2.5%
O'ahu Upper Upscale	85.2%	89.4%	-4.3%	\$246.22	\$246.04	0.1%	\$209.69	\$220.00	-4.7%
O'ahu Upscale	79.5%	72.2%	7.3%	\$204.83	\$188.49	8.7%	\$162.88	\$136.11	19.7%
O'ahu Upper Midscale	80.1%	79.7%	0.4%	\$148.80	\$139.31	6.8%	\$119.21	\$111.09	7.3%
O'ahu Midscale & Economy	80.6%	86.9%	-6.2%	\$129.81	\$116.50	11.4%	\$104.67	\$101.18	3.4%
<b>Maui County</b>	70.9%	74.8%	-4.0%	\$306.66	\$295.56	3.8%	\$217.28	\$221.19	-1.8%
Wailea	84.2%	78.2%	6.0%	\$454.90	\$448.09	1.5%	\$383.02	\$350.33	9.3%
Lahaina/Ka'anapali/Kapalua	69.6%	76.8%	-7.2%	\$265.76	\$252.10	5.4%	\$184.95	\$193.69	-4.5%
Other Maui County	72.5%	72.3%	0.1%	\$356.77	\$353.95	0.8%	\$258.51	\$255.95	1.0%
Maui County Luxury	74.4%	69.5%	4.9%	\$483.81	\$476.67	1.5%	\$359.98	\$331.32	8.7%
Maui County Upper Upscale & Upscale	71.4%	77.5%	-6.2%	\$253.09	\$243.79	3.8%	\$180.61	\$188.98	-4.4%
<b>Island of Hawai'i</b>	66.1%	73.5%	-7.4%	\$236.38	\$228.89	3.3%	\$156.19	\$168.25	-7.2%
Kohala Coast	63.6%	69.6%	-6.0%	\$314.69	\$307.43	2.4%	\$200.19	\$214.10	-6.5%
<b>Kaua'i</b>	73.6%	76.2%	-2.6%	\$263.57	\$236.48	11.5%	\$194.05	\$180.24	7.7%

Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority

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.

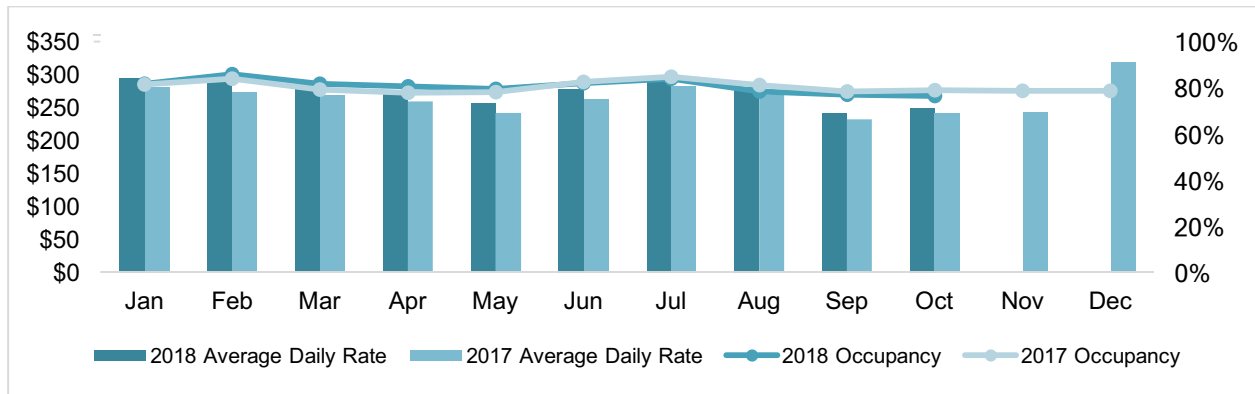
**Figure 2: Hawai'i Hotel Performance Year-to-Date October 2018**

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
<b>State of Hawai'i</b>	80.5%	80.5%	0.0%	\$275.44	\$261.11	5.5%	\$221.80	\$210.21	5.5%
Luxury Class	75.2%	75.3%	-0.1%	\$543.81	\$510.38	6.5%	\$409.20	\$384.53	6.4%
Upper Upscale Class	85.0%	86.3%	-1.2%	\$272.54	\$261.54	4.2%	\$231.69	\$225.59	2.7%
Upscale Class	75.9%	74.4%	1.5%	\$209.79	\$194.77	7.7%	\$159.23	\$144.85	9.9%
Upper Midscale Class	81.9%	81.1%	0.9%	\$165.86	\$157.48	5.3%	\$135.87	\$127.65	6.4%
Midscale & Economy Class	80.4%	80.2%	0.2%	\$163.36	\$149.87	9.0%	\$131.38	\$120.25	9.3%
<b>O'ahu</b>	84.5%	83.8%	0.6%	\$236.82	\$231.56	2.3%	\$200.01	\$194.07	3.1%
Waikiki	85.0%	84.6%	0.3%	\$232.70	\$227.34	2.4%	\$197.68	\$192.39	2.7%
Other O'ahu	81.5%	78.8%	2.7%	\$262.26	\$259.27	1.2%	\$213.81	\$204.30	4.7%
O'ahu Luxury	71.4%	71.9%	-0.5%	\$488.37	\$477.65	2.2%	\$348.86	\$343.49	1.6%
O'ahu Upper Upscale	89.0%	89.4%	-0.3%	\$255.29	\$253.92	0.5%	\$227.25	\$226.91	0.1%
O'ahu Upscale	80.4%	77.4%	3.0%	\$209.88	\$196.62	6.7%	\$168.79	\$152.25	10.9%
O'ahu Upper Midscale	83.9%	83.0%	0.8%	\$155.34	\$149.86	3.7%	\$130.25	\$124.42	4.7%
O'ahu Midscale & Economy	87.6%	87.4%	0.2%	\$134.08	\$127.27	5.4%	\$117.48	\$111.27	5.6%
<b>Maui County</b>	76.7%	77.4%	-0.7%	\$379.24	\$345.01	9.9%	\$290.75	\$267.06	8.9%
Wailea	87.6%	85.0%	2.5%	\$573.88	\$520.05	10.4%	\$502.44	\$442.08	13.7%
Lahaina/Kā'anapali/Kapalua	76.1%	77.9%	-1.8%	\$318.82	\$292.60	9.0%	\$242.56	\$227.84	6.5%
Other Maui County	77.4%	76.8%	0.6%	\$454.56	\$411.42	10.5%	\$351.88	\$316.09	11.3%
Maui County Luxury	78.4%	76.1%	2.3%	\$625.47	\$576.74	8.4%	\$490.22	\$439.00	11.7%
Maui County Upper Upscale & Upscale	77.1%	78.9%	-1.8%	\$298.20	\$272.94	9.3%	\$229.77	\$215.23	6.8%
<b>Island of Hawai'i</b>	73.1%	74.8%	-1.7%	\$258.56	\$245.15	5.5%	\$189.06	\$183.40	3.1%
Kohala Coast	69.9%	73.8%	-3.9%	\$364.47	\$338.96	7.5%	\$254.68	\$250.10	1.8%
<b>Kaua'i</b>	76.7%	76.3%	0.4%	\$289.70	\$261.99	10.6%	\$222.25	\$199.96	11.1%

Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority

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.

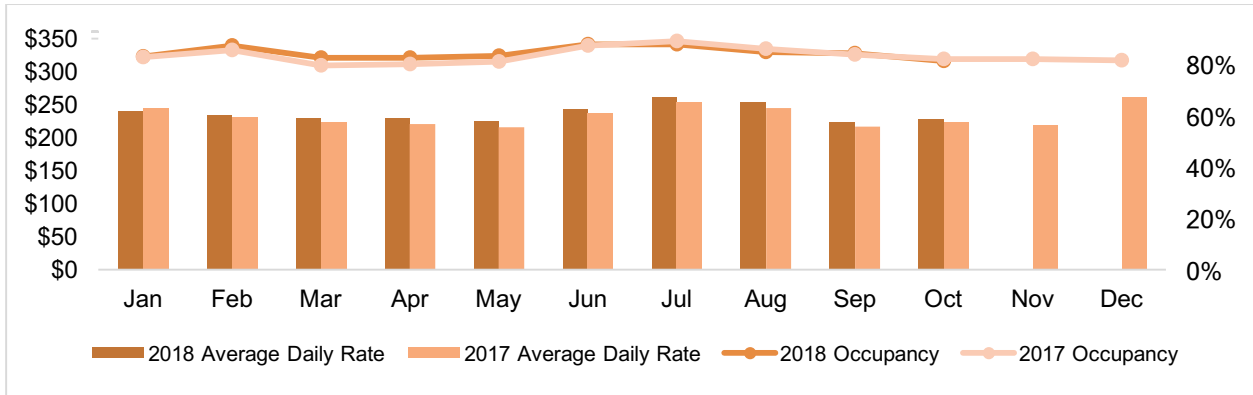
**Figure 3: Monthly State of Hawai'i Hotel Performance, 2018 vs. 2017**



Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority.

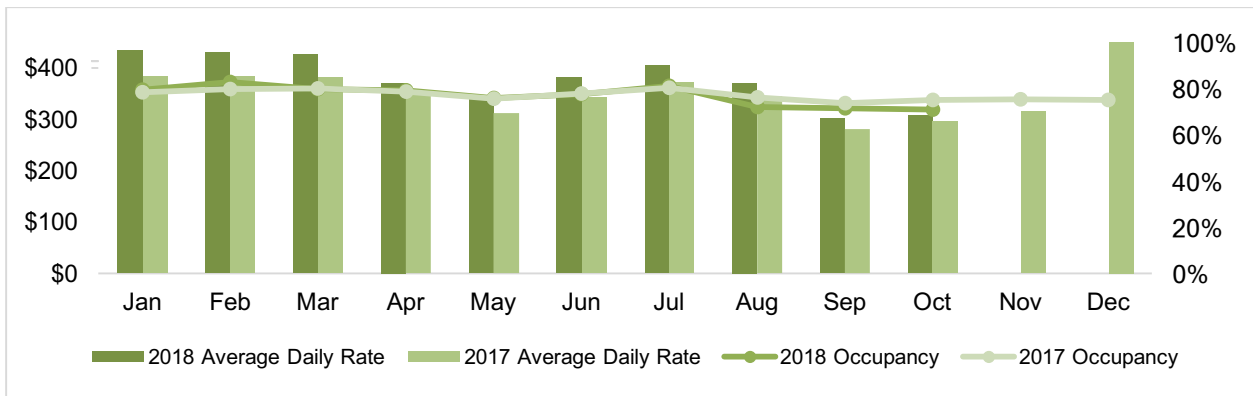
January and February 2017 data courtesy of Hospitality Advisors LLC.

**Figure 4: Monthly O'ahu Hotel Performance, 2018 vs. 2017**



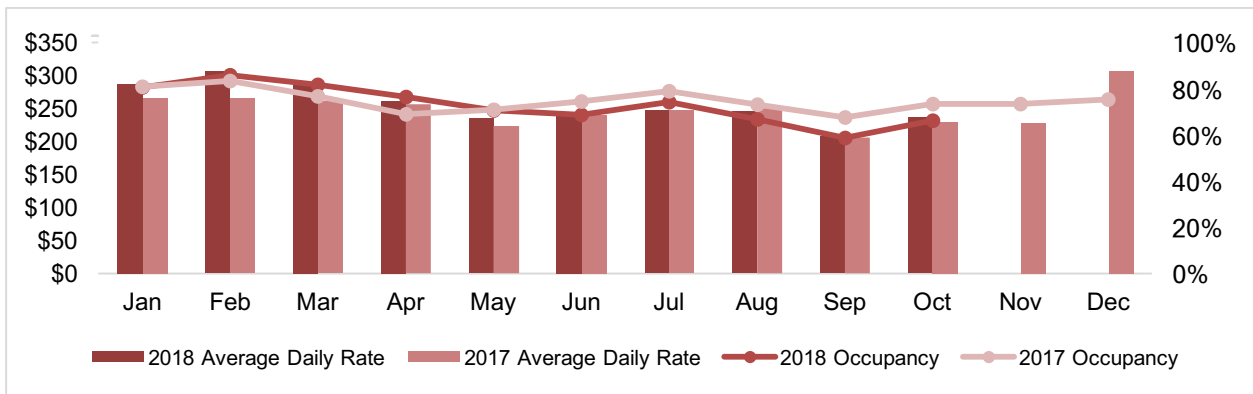
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**Figure 5: Monthly Maui County Hotel Performance, 2018 vs. 2017**



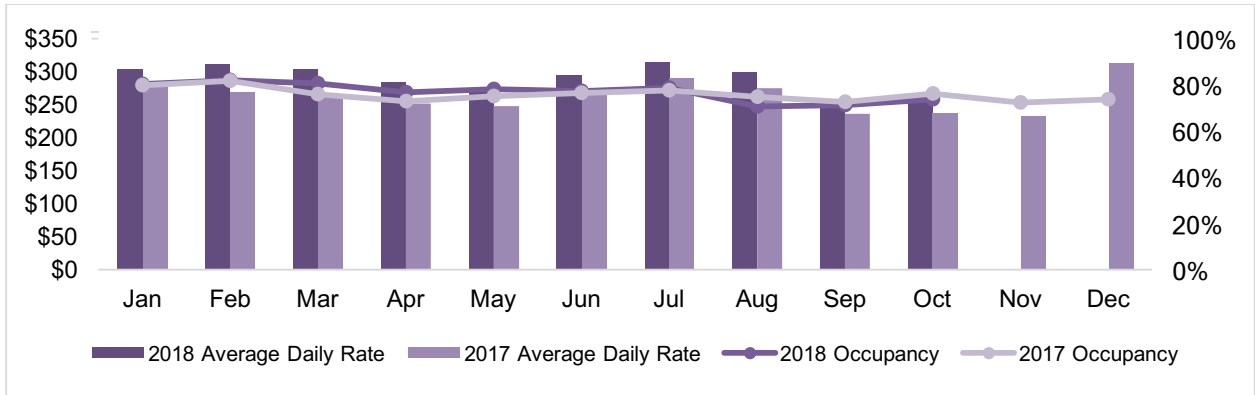
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**Figure 6: Monthly Island of Hawai'i Hotel Performance, 2018 vs. 2017**



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January and February 2017 data courtesy of Hospitality Advisors LLC.

**Figure 7: Monthly Kaua'i Hotel Performance, 2018 vs. 2017**



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