



October 2019 Hawai'i Hotel Performance Report

In October 2019, Hawai'i hotels statewide reported growth in revenue per available room (RevPAR), average daily rate (ADR) and occupancy compared to October 2018.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority (HTA), statewide RevPAR increased to \$200 (+4.3%), with ADR at \$253 (+1.7%) and occupancy of 79.1 percent (+2.0 percentage points) (Figure 1) in October.

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 October, Hawai'i hotel room revenues statewide grew by 3.8 percent to \$333.8 million, which is \$12.2 million higher than last year. Room demand was up 2.1 percent to 1.3 million rooms, with supply 0.5 percent lower 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 October.¹

Most classes of Hawai'i hotel properties statewide reported RevPAR gains in October. Luxury Class properties reported RevPAR growth to \$349 (+3.8%), with increases in both occupancy (+1.5 percentage points) to 74.2% and ADR at \$471 (+1.8%). Midscale & Economy Class hotels reported RevPAR of \$121 (-6.2%), with higher occupancy of 79.7 percent (+2.2 percentage points) unable to offset lower ADR at \$152 (-8.8%).

Among Hawai'i's four island counties, Maui County hotels led the state in RevPAR at \$251 (+9.9%), with ADR of \$329 (+4.3%) and occupancy of 76.3 percent (+3.9 percentage points) in October.

O'ahu hotels reported RevPAR growth to \$188 (+2.5%) in October, with increases in ADR to \$228 (+0.9%) and occupancy of 82.6 percent (+1.3 percentage points).

Hotels on the island of Hawai'i saw significant increases in RevPAR to \$177 (+12.0%), ADR at \$239 (+2.6%) and occupancy of 74.1 percent (+6.2 percentage points) in October compared to the same time a year ago. 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 RevPAR of \$177 (-10.3%), ADR at \$253 (-2.9%) and occupancy of 69.9 percent (-5.7 percentage points) in October.

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiiourismauthority.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 October 2019, the survey included 158 properties representing 46,496 rooms, or 86.5 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 October 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	79.1%	77.1%	2.0%	\$253.29	\$249.05	1.7%	\$200.26	\$192.01	4.3%
Luxury Class	74.2%	72.7%	1.5%	\$470.96	\$462.83	1.8%	\$349.26	\$336.34	3.8%
Upper Upscale Class	79.4%	79.4%	0.0%	\$260.39	\$253.33	2.8%	\$206.84	\$201.23	2.8%
Upscale Class	80.1%	73.9%	6.2%	\$196.91	\$192.12	2.5%	\$157.63	\$141.91	11.1%
Upper Midscale Class	81.5%	79.5%	2.0%	\$152.60	\$151.11	1.0%	\$124.34	\$120.07	3.6%
Midscale & Economy Class	79.7%	77.6%	2.2%	\$152.19	\$166.85	-8.8%	\$121.34	\$129.39	-6.2%
O'ahu	82.6%	81.2%	1.3%	\$227.62	\$225.63	0.9%	\$187.94	\$183.27	2.5%
Waikiki	83.0%	81.5%	1.5%	\$226.03	\$223.11	1.3%	\$187.56	\$181.85	3.1%
Other O'ahu	80.1%	79.5%	0.6%	\$237.27	\$241.21	-1.6%	\$190.14	\$191.86	-0.9%
O'ahu Luxury	72.9%	71.0%	1.9%	\$454.95	\$445.21	2.2%	\$331.78	\$316.12	5.0%
O'ahu Upper Upscale	83.0%	84.6%	-1.6%	\$250.06	\$248.02	0.8%	\$207.46	\$209.74	-1.1%
O'ahu Upscale	87.4%	80.0%	7.5%	\$189.90	\$188.81	0.6%	\$166.06	\$150.97	10.0%
O'ahu Upper Midscale	81.8%	79.9%	1.9%	\$149.48	\$147.71	1.2%	\$122.25	\$118.07	3.5%
O'ahu Midscale & Economy	85.5%	79.1%	6.3%	\$132.03	\$134.17	-1.6%	\$112.83	\$106.16	6.3%
Maui County	76.3%	72.4%	3.9%	\$328.62	\$314.97	4.3%	\$250.66	\$228.06	9.9%
Wailea	86.9%	85.7%	1.2%	\$489.88	\$461.94	6.0%	\$425.80	\$395.87	7.6%
Lahaina/Kā'anapali/Kapalua	73.8%	70.7%	3.2%	\$282.36	\$271.57	4.0%	\$208.49	\$191.95	8.6%
Other Maui County	79.3%	74.6%	4.7%	\$382.80	\$367.49	4.2%	\$303.74	\$274.20	10.8%
Maui County Luxury	79.8%	76.3%	3.5%	\$504.55	\$494.13	2.1%	\$402.61	\$376.84	6.8%
Maui County Upper Upscale & Upscale	76.3%	71.5%	4.8%	\$277.79	\$254.82	9.0%	\$211.97	\$182.19	16.3%
Island of Hawai'i	74.1%	67.9%	6.2%	\$239.20	\$233.08	2.6%	\$177.19	\$158.26	12.0%
Kohala Coast	73.1%	63.8%	9.3%	\$320.54	\$314.08	2.1%	\$234.31	\$200.49	16.9%
Kaua'i	69.9%	75.6%	-5.7%	\$252.79	\$260.45	-2.9%	\$176.72	\$196.98	-10.3%

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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 October 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,666.7	1,674.6	-0.5%	1,317.8	1,291.0	2.1%	333.8	321.5	3.8%
O'ahu	947.1	940.2	0.7%	782.0	763.7	2.4%	178.0	172.3	3.3%
Waikiki	808.5	806.5	0.2%	670.9	657.4	2.1%	151.6	146.7	3.4%
Maui County	385.7	394.8	-2.3%	294.2	285.8	2.9%	96.7	90.0	7.4%
Wailea	68.0	68.0	0.0%	59.1	58.3	1.4%	29.0	26.9	7.6%
Lahaina/Kā'anapali/Kapalua	215.0	221.4	-2.9%	158.7	156.5	1.4%	44.8	42.5	5.4%
Island of Hawai'i	196.0	199.1	-1.6%	145.2	135.2	7.4%	34.7	31.5	10.2%
Kohala Coast	91.1	93.0	-2.0%	66.6	59.4	12.2%	21.4	18.6	14.5%
Kaua'i	137.9	140.5	-1.9%	96.4	106.3	-9.3%	24.4	27.7	-11.9%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	81.1%	81.1%	0.1%	\$278.07	\$273.12	1.8%	\$225.65	\$221.47	1.9%
Luxury Class	77.0%	75.4%	1.6%	\$551.00	\$545.67	1.0%	\$424.42	\$411.49	3.1%
Upper Upscale Class	82.9%	84.1%	-1.2%	\$278.77	\$270.85	2.9%	\$231.04	\$227.83	1.4%
Upscale Class	77.7%	77.1%	0.7%	\$207.79	\$204.66	1.5%	\$161.54	\$157.76	2.4%
Upper Midscale Class	85.3%	83.5%	1.8%	\$160.94	\$158.28	1.7%	\$137.26	\$132.10	3.9%
Midscale & Economy Class	81.6%	82.8%	-1.2%	\$173.48	\$176.11	-1.5%	\$141.54	\$145.76	-2.9%
O'ahu	84.4%	84.4%	-0.1%	\$237.30	\$234.59	1.2%	\$200.21	\$198.06	1.1%
Waikiki	84.6%	84.9%	-0.3%	\$232.62	\$230.24	1.0%	\$196.89	\$195.46	0.7%
Other O'ahu	82.8%	81.6%	1.2%	\$266.11	\$262.29	1.5%	\$220.23	\$213.97	2.9%
O'ahu Luxury	74.0%	71.4%	2.6%	\$487.87	\$488.37	-0.1%	\$361.18	\$348.86	3.5%
O'ahu Upper Upscale	85.5%	87.7%	-2.2%	\$260.65	\$257.00	1.4%	\$222.78	\$225.37	-1.1%
O'ahu Upscale	84.1%	81.9%	2.2%	\$192.62	\$191.85	0.4%	\$162.07	\$157.21	3.1%
O'ahu Upper Midscale	85.8%	83.9%	1.9%	\$156.78	\$153.68	2.0%	\$134.57	\$128.95	4.4%
O'ahu Midscale & Economy	86.9%	86.8%	0.2%	\$137.86	\$140.15	-1.6%	\$119.87	\$121.63	-1.4%
Maui County	78.3%	76.8%	1.5%	\$390.61	\$380.29	2.7%	\$305.88	\$292.03	4.7%
Wailea	89.0%	87.7%	1.3%	\$597.16	\$574.38	4.0%	\$531.50	\$503.75	5.5%
Lahaina/Kā'anapali/Kapalua	77.0%	76.2%	0.9%	\$328.22	\$319.42	2.8%	\$252.86	\$243.32	3.9%
Other Maui County	79.9%	77.6%	2.4%	\$467.32	\$456.13	2.5%	\$373.50	\$353.82	5.6%
Maui County Luxury	82.2%	79.2%	3.0%	\$638.14	\$632.97	0.8%	\$524.43	\$501.07	4.7%
Maui County Upper Upscale & Upscale	78.0%	77.0%	1.1%	\$312.19	\$298.68	4.5%	\$243.65	\$229.89	6.0%
Island of Hawai'i	76.9%	75.5%	1.4%	\$262.02	\$255.42	2.6%	\$201.57	\$192.95	4.5%
Kohala Coast	77.5%	70.1%	7.4%	\$369.13	\$363.78	1.5%	\$286.24	\$255.07	12.2%
Kaua'i	73.3%	78.9%	-5.6%	\$280.84	\$286.27	-1.9%	\$205.97	\$225.99	-8.9%

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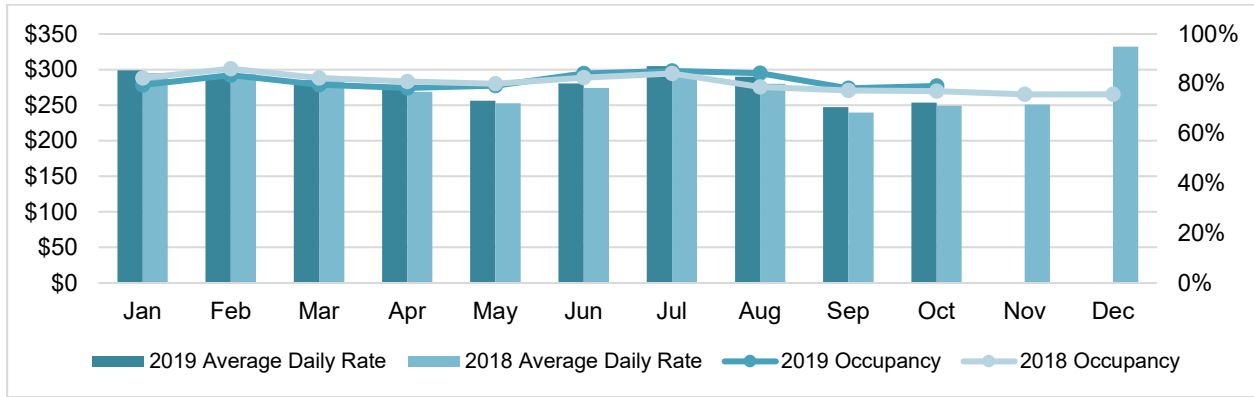
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	16,397.9	16,656.7	-1.6%	13,306.4	13,506.8	-1.5%	3,700.1	3,689.0	0.3%
O'ahu	9,237.3	9,331.0	-1.0%	7,793.7	7,878.1	-1.1%	1,849.4	1,848.1	0.1%
Waikiki	7,922.0	8,019.8	-1.2%	6,705.2	6,808.5	-1.5%	1,559.8	1,567.6	-0.5%
Maui County	3,847.5	3,856.0	-0.2%	3,012.9	2,961.1	1.8%	1,176.9	1,126.1	4.5%
Wailea	667.0	667.0	0.0%	593.6	585.0	1.5%	354.5	336.0	5.5%
Lahaina/Kā'anapali/Kapalua	2,156.8	2,156.3	0.0%	1,661.6	1,642.6	1.2%	545.4	524.7	3.9%
Island of Hawai'i	1,946.4	2,097.1	-7.2%	1,497.4	1,584.1	-5.5%	392.4	404.6	-3.0%
Kohala Coast	908.3	1,005.1	-9.6%	704.4	704.7	-0.1%	260.0	256.4	1.4%
Kaua'i	1,366.7	1,372.6	-0.4%	1,002.3	1,083.5	-7.5%	281.5	310.2	-9.3%

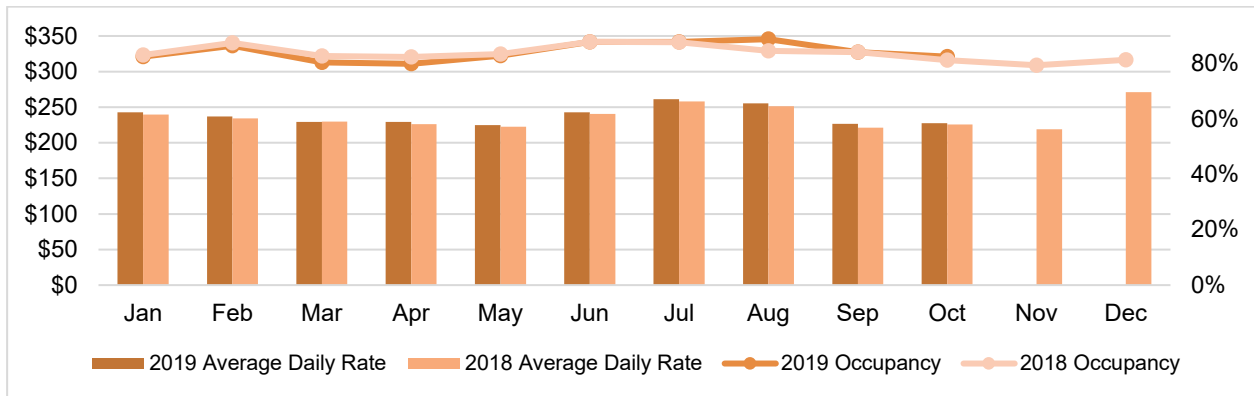
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



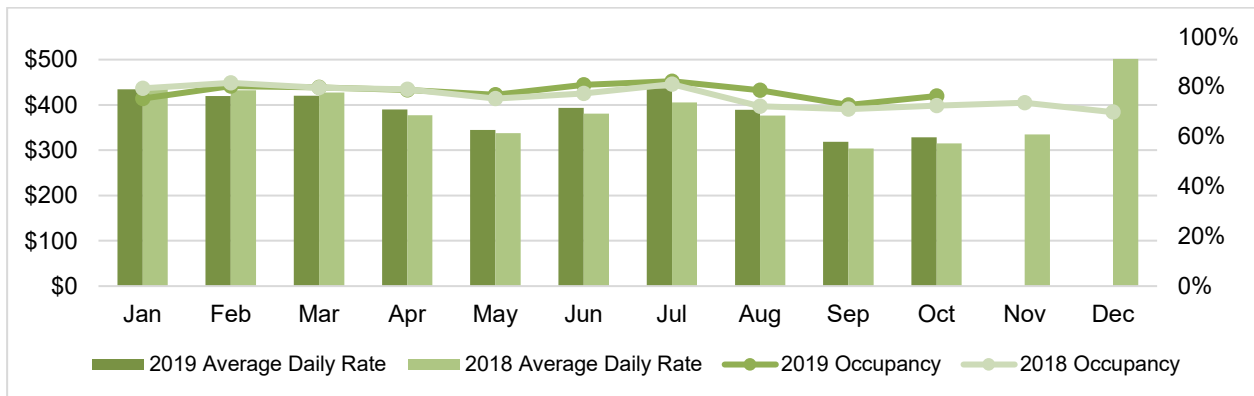
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



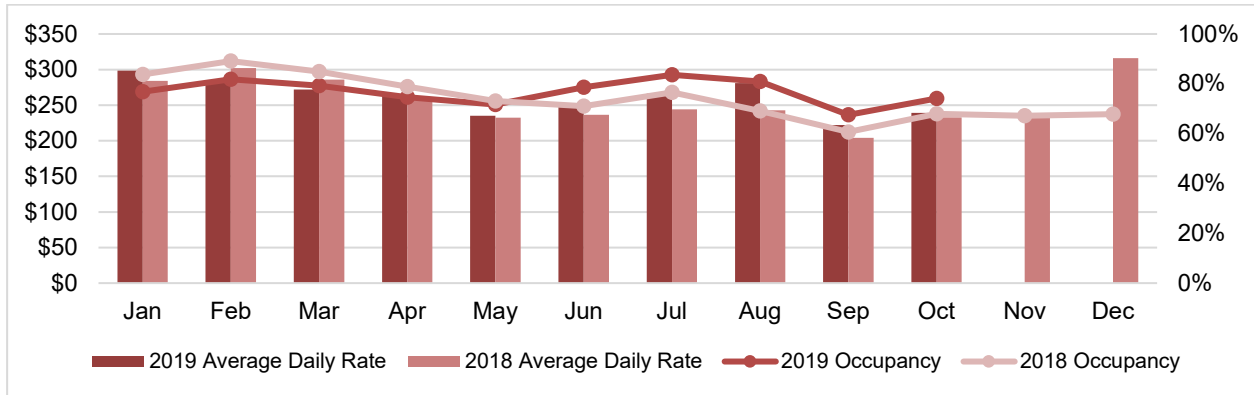
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



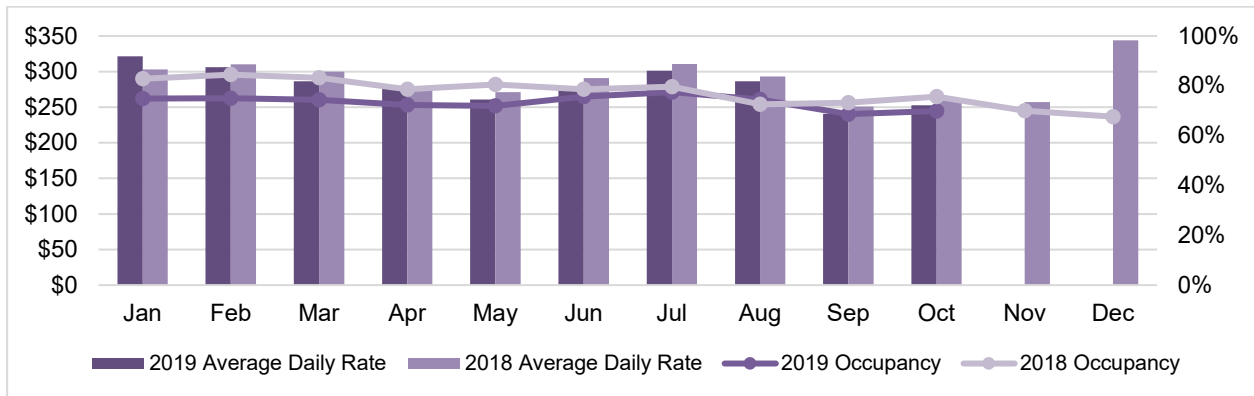
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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



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