



November 2019 Hawaii Hotel Performance Report

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

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR increased to \$205 (+8.1%), with ADR at \$260 (+4.4%) and occupancy of 78.8 percent (+2.7 percentage points) (Figure 1) in November.

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 November, Hawaii hotel room revenues statewide grew by 7.6 percent to \$330.3 million, which is \$23.2 million higher than last year. Room demand rose to 1.3 million room nights, up 3.1 percent compared to a year ago. Room supply was similar year-over-year (1.6 million room nights, -0.5%) (Figure 2). Several hotel properties across the state were closed for renovation or had rooms out of service for renovation during November.¹

All classes of Hawaii hotel properties statewide reported RevPAR gains in November. Luxury Class properties reported RevPAR growth to \$371 (+3.9%), with increases in ADR at \$509 (+3.9%) and flat occupancy. Midscale & Economy Class hotels reported RevPAR of \$135 (+11.1%), with increases in both occupancy (81.6%, +5.2 percentage points) and ADR (\$166, +4.0%)

Among Hawaii's four island counties, Maui County hotels led the state in RevPAR at \$265 (+7.7%), with ADR of \$354 (+5.8%) and occupancy of 74.9 percent (+1.3 percentage points) in November. Properties in Wailea, where there are a number of luxury resorts, earned RevPAR of \$444 (+3.0%), with increases in ADR (\$536, +7.5%) offsetting lower occupancy (82.8%, -3.6 percentage points).

O'ahu hotels reported RevPAR growth to \$188 (+9.1%) in November, with increases in ADR to \$229 (+5.4%) and occupancy of 82.0 percent (+2.8 percentage points). Waikiki properties earned RevPAR of \$188 (+11.4%), with increases in both ADR (\$227, +6.5%) and occupancy (83.1%, +3.7 percentage points).

Hotels on the island of Hawaii saw significant increases in RevPAR to \$185 (+13.5%), ADR at \$245 (+3.8%) and occupancy of 75.7 percent (+6.5 percentage points) in November compared to the same time a year ago. Properties on the Kohala Coast earned RevPAR of \$271 (+16.3%), ADR at \$349 (+2.5%), and occupancy of 77.8 percent (+9.3 percentage points). In May 2018, Kilauea volcano started erupting in lower Puna, which contributed to a downturn in visitors to the island of Hawaii in the following months.

Kauai hotels reported lower RevPAR of \$180 (-1.7%), ADR at \$250 (-1.9%) and occupancy of 72.2 percent (+0.2 percentage points) in November.

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.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 November 2019, the survey included 168 properties representing 48,185 rooms, or 89.6 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 November 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	78.8%	76.1%	2.7%	\$259.78	\$248.88	4.4%	\$204.80	\$189.50	8.1%
Luxury Class	72.8%	72.8%	0.0%	\$509.27	\$490.01	3.9%	\$370.72	\$356.81	3.9%
Upper Upscale Class	79.8%	78.1%	1.8%	\$259.78	\$248.68	4.5%	\$207.41	\$194.13	6.8%
Upscale Class	78.4%	73.5%	4.9%	\$195.56	\$186.31	5.0%	\$153.32	\$137.02	11.9%
Upper Midscale Class	81.4%	77.8%	3.7%	\$157.09	\$143.00	9.9%	\$127.94	\$111.19	15.1%
Midscale & Economy Class	81.6%	76.4%	5.2%	\$165.69	\$159.30	4.0%	\$135.26	\$121.78	11.1%
O'ahu	82.0%	79.3%	2.8%	\$228.79	\$216.98	5.4%	\$187.70	\$172.02	9.1%
Waikiki	83.1%	79.4%	3.7%	\$226.80	\$213.00	6.5%	\$188.44	\$169.11	11.4%
Other O'ahu	75.9%	78.6%	-2.6%	\$241.52	\$241.23	0.1%	\$183.42	\$189.59	-3.3%
O'ahu Luxury	73.3%	69.3%	4.0%	\$459.77	\$446.50	3.0%	\$336.94	\$309.37	8.9%
O'ahu Upper Upscale	82.9%	81.9%	1.0%	\$248.91	\$237.81	4.7%	\$206.31	\$194.84	5.9%
O'ahu Upscale	84.4%	79.3%	5.1%	\$189.83	\$180.93	4.9%	\$160.14	\$143.41	11.7%
O'ahu Upper Midscale	81.5%	78.1%	3.5%	\$153.55	\$139.32	10.2%	\$125.21	\$108.74	15.1%
O'ahu Midscale & Economy	85.2%	78.7%	6.5%	\$132.80	\$126.61	4.9%	\$113.16	\$99.64	13.6%
Maui County	74.9%	73.6%	1.3%	\$354.19	\$334.86	5.8%	\$265.35	\$246.46	7.7%
Wailea	82.8%	86.4%	-3.6%	\$536.34	\$498.73	7.5%	\$443.89	\$430.95	3.0%
Lahaina/Kā'anapali/Kapalua	72.0%	70.9%	1.2%	\$298.80	\$282.43	5.8%	\$215.29	\$200.11	7.6%
Other Maui County	78.5%	77.1%	1.4%	\$418.14	\$396.40	5.5%	\$328.36	\$305.68	7.4%
Maui County Luxury	75.1%	76.3%	-1.1%	\$578.18	\$552.29	4.7%	\$434.45	\$421.15	3.2%
Maui County Upper Upscale & Upscale	74.6%	72.9%	1.7%	\$281.00	\$261.66	7.4%	\$209.51	\$190.64	9.9%
Island of Hawai'i	75.7%	69.2%	6.5%	\$244.89	\$235.98	3.8%	\$185.47	\$163.37	13.5%
Kohala Coast	77.8%	68.5%	9.3%	\$348.51	\$340.15	2.5%	\$271.19	\$233.16	16.3%
Kaua'i	72.2%	72.0%	0.2%	\$249.79	\$254.59	-1.9%	\$180.32	\$183.39	-1.7%

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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 November 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,613.0	1,620.6	-0.5%	1,271.6	1,233.9	3.1%	330.3	307.1	7.6%
O'ahu	916.5	909.9	0.7%	751.9	721.4	4.2%	172.0	156.5	9.9%
Waikiki	782.4	780.5	0.2%	650.1	619.7	4.9%	147.4	132.0	11.7%
Maui County	373.3	382.0	-2.3%	279.6	281.2	-0.5%	99.0	94.2	5.2%
Wailea	65.8	65.8	0.0%	54.5	56.9	-4.2%	29.2	28.4	3.0%
Lahaina/Kā'anapali/Kapalua	208.0	214.3	-2.9%	149.9	151.8	-1.3%	44.8	42.9	4.4%
Island of Hawai'i	189.7	192.7	-1.6%	143.6	133.4	7.7%	35.2	31.5	11.7%
Kohala Coast	88.2	90.0	-2.0%	68.6	61.7	11.3%	23.9	21.0	14.0%
Kaua'i	133.5	136.0	-1.8%	96.4	98.0	-1.6%	24.1	24.9	-3.5%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	80.9%	80.7%	0.2%	\$276.06	\$271.09	1.8%	\$223.28	\$218.64	2.1%
Luxury Class	76.2%	75.0%	1.2%	\$545.39	\$538.99	1.2%	\$415.59	\$404.16	2.8%
Upper Upscale Class	82.6%	83.7%	-1.1%	\$276.31	\$268.97	2.7%	\$228.27	\$225.09	1.4%
Upscale Class	77.8%	76.8%	1.0%	\$206.72	\$203.12	1.8%	\$160.83	\$155.94	3.1%
Upper Midscale Class	85.0%	82.9%	2.1%	\$160.98	\$156.99	2.5%	\$136.91	\$130.22	5.1%
Midscale & Economy Class	81.6%	82.2%	-0.6%	\$172.78	\$174.71	-1.1%	\$140.98	\$143.60	-1.8%
O'ahu	84.2%	84.0%	0.2%	\$236.61	\$233.11	1.5%	\$199.20	\$195.75	1.8%
Waikiki	84.5%	84.4%	0.1%	\$232.18	\$228.80	1.5%	\$196.26	\$193.12	1.6%
Other O'ahu	82.1%	81.3%	0.8%	\$264.01	\$260.46	1.4%	\$216.82	\$211.78	2.4%
O'ahu Luxury	74.0%	71.2%	2.7%	\$485.33	\$484.72	0.1%	\$358.98	\$345.31	4.0%
O'ahu Upper Upscale	85.2%	87.2%	-1.9%	\$259.59	\$255.41	1.6%	\$221.27	\$222.67	-0.6%
O'ahu Upscale	84.2%	81.7%	2.5%	\$192.38	\$190.92	0.8%	\$161.90	\$155.99	3.8%
O'ahu Upper Midscale	85.6%	83.4%	2.2%	\$156.91	\$152.47	2.9%	\$134.25	\$127.14	5.6%
O'ahu Midscale & Economy	86.8%	86.1%	0.7%	\$137.42	\$139.04	-1.2%	\$119.27	\$119.66	-0.3%
Maui County	77.7%	76.5%	1.2%	\$385.99	\$376.35	2.6%	\$299.89	\$287.92	4.2%
Wailea	88.4%	87.6%	0.9%	\$592.05	\$567.67	4.3%	\$523.63	\$497.21	5.3%
Lahaina/Kā'anapali/Kapalua	76.6%	75.7%	0.9%	\$326.02	\$316.29	3.1%	\$249.63	\$239.42	4.3%
Other Maui County	79.1%	77.5%	1.6%	\$459.93	\$450.79	2.0%	\$363.92	\$349.50	4.1%
Maui County Luxury	80.3%	78.3%	2.0%	\$627.24	\$619.35	1.3%	\$503.52	\$484.82	3.9%
Maui County Upper Upscale & Upscale	77.7%	76.8%	0.9%	\$307.56	\$295.62	4.0%	\$239.01	\$227.12	5.2%
Island of Hawai'i	76.8%	75.0%	1.8%	\$260.52	\$253.91	2.6%	\$200.15	\$190.46	5.1%
Kohala Coast	77.6%	70.0%	7.6%	\$367.30	\$361.88	1.5%	\$284.90	\$253.26	12.5%
Kaua'i	73.2%	78.3%	-5.1%	\$278.09	\$283.65	-2.0%	\$203.68	\$222.15	-8.3%

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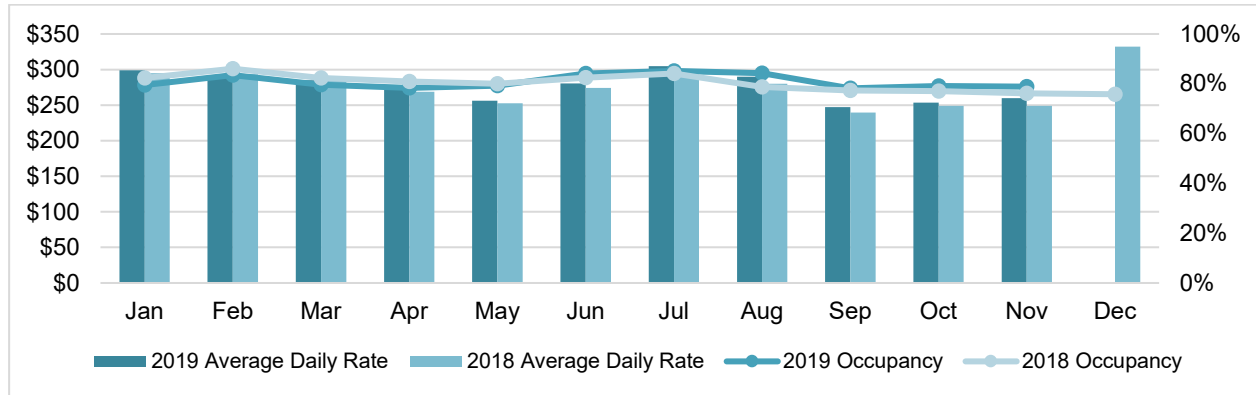
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	18,010.8	18,277.3	-1.5%	14,567.3	14,740.8	-1.2%	4,021.4	3,996.1	0.6%
O'ahu	10,153.8	10,240.9	-0.9%	8,548.3	8,599.5	-0.6%	2,022.6	2,004.6	0.9%
Waikiki	8,704.4	8,800.3	-1.1%	7,357.9	7,428.2	-0.9%	1,708.4	1,699.6	0.5%
Maui County	4,220.7	4,238.0	-0.4%	3,279.2	3,242.2	1.1%	1,265.7	1,220.2	3.7%
Wailea	732.8	732.8	0.0%	648.1	641.8	1.0%	383.7	364.4	5.3%
Lahaina/Kā'anapali/Kapalua	2,364.7	2,370.6	-0.2%	1,810.6	1,794.4	0.9%	590.3	567.6	4.0%
Island of Hawai'i	2,136.1	2,289.8	-6.7%	1,641.1	1,717.5	-4.5%	427.5	436.1	-2.0%
Kohala Coast	996.5	1,095.1	-9.0%	773.0	766.4	0.9%	283.9	277.3	2.4%
Kaua'i	1,500.2	1,508.6	-0.6%	1,098.8	1,181.5	-7.0%	305.6	335.1	-8.8%

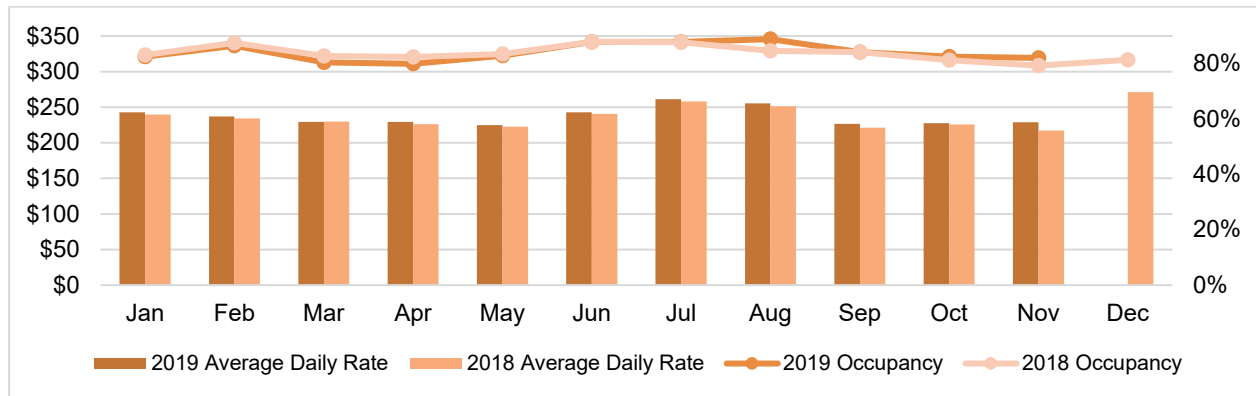
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



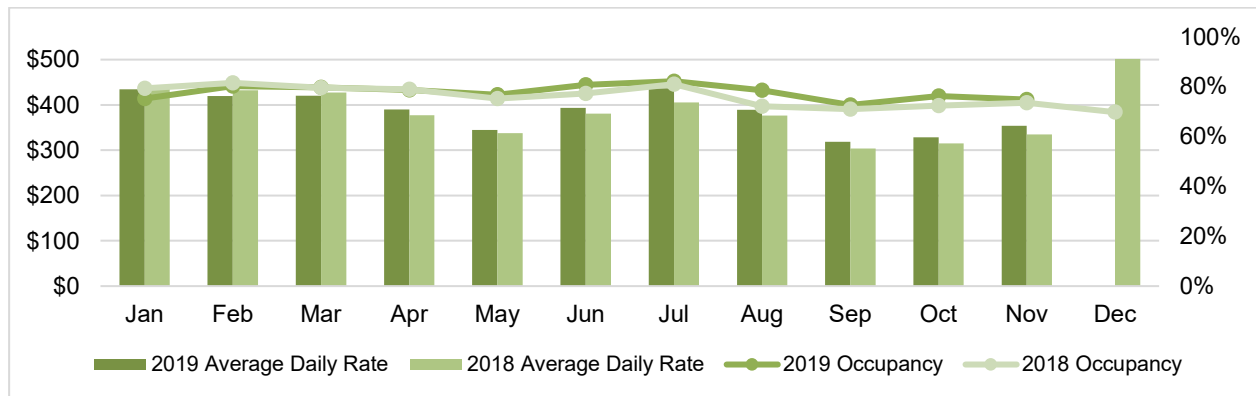
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



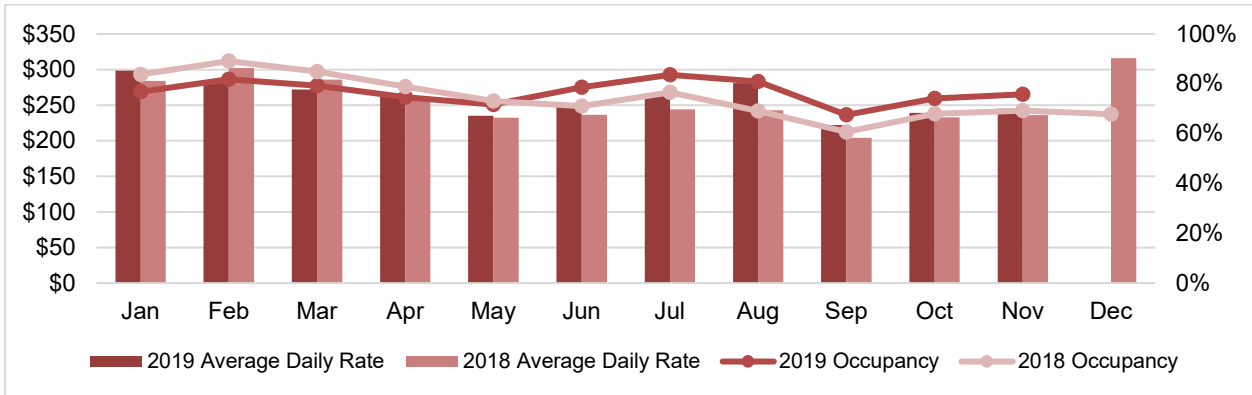
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



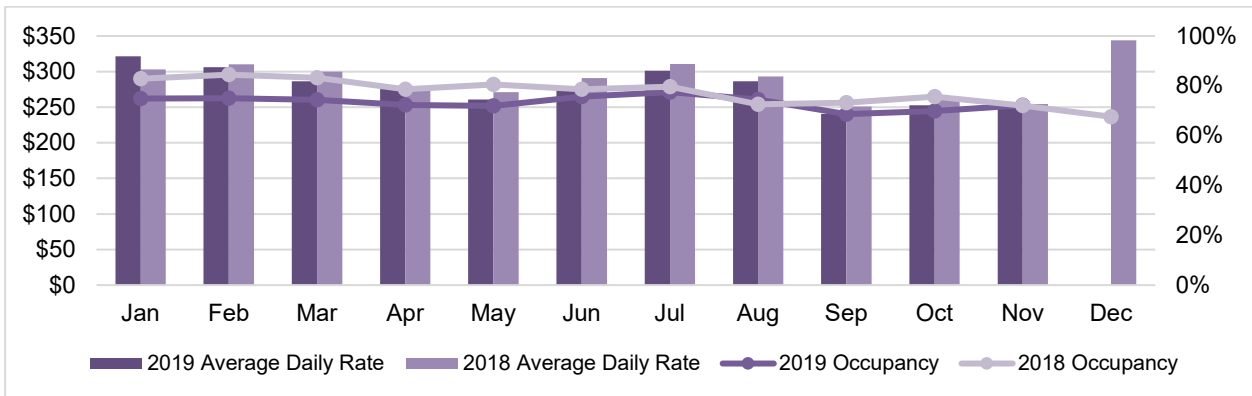
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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

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



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