



## 2019 Hawai'i Hotel Performance Report

Hawai'i hotels statewide concluded 2019 with growth in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to 2018. Hawai'i hotels had the highest RevPAR and ADR during 2019 in comparison to other top U.S. markets.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority (HTA), statewide RevPAR rose to \$229 (+3.6%), with ADR at \$283 (+2.5%) and occupancy of 81.2 percent (+0.9 percentage points) (Figure 1) in 2019.

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 2019, statewide hotel room revenues of \$4.49 billion were 1.8 percent higher than in 2018. There were nearly 356,000 fewer available room nights (-1.8%) and more than 111,000 fewer occupied room nights (-0.7%) 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 2019.

Luxury Class properties reported RevPAR of \$431 (+4.0%), with ADR at \$567 (+1.9%) and occupancy of 76.0 percent (+1.5 percentage points). Midscale & Economy Class hotels reported RevPAR of \$144 (-0.7%), with ADR at \$177 (-0.5%) and occupancy of 81.2 percent (-0.2 percentage points).

### Comparison to Top U.S. Markets

In comparison to other top U.S. markets, hotels in the Hawaiian Islands earned the highest RevPAR at \$229 during 2019, followed by New York City at \$220 (-3.5%) and San Francisco/San Mateo at \$206 (+4.2%) (Figure 3). Hawai'i also led the U.S. markets in ADR at \$283, followed by New York City at \$255 (-2.4%) and San Francisco/San Mateo at \$251 (+4.1%) (Figure 4). The Hawaiian Islands ranked third for occupancy at 81.2 percent, with New York City topping the list at 86.2 percent (-1.0 percentage points), followed by San Francisco/San Mateo at 82.0 percent (+0.1 percentage points) (Figure 5).

### Hotel Results by County

In 2019, Maui County hotels led Hawai'i's four island counties in RevPAR at \$310 (+5.8%), with ADR at \$399 (+3.4%) and occupancy of 77.7 percent (+1.7 percentage points).

O'ahu hotels earned higher RevPAR of \$203 compared to 2018 (+2.5%), with ADR at \$241 (+2.0%) and occupancy of 84.2 percent (+0.4 percentage points).

Hotels on the island of Hawai'i reported RevPAR growth to \$205 (+6.6%), with increases in both ADR to \$267 (+3.2%) and occupancy of 77.1 percent (+2.5 percentage points).

Kaua'i hotels' RevPAR decreased to \$216 (-3.4%), with declines in both ADR to \$283 (-1.8%) and occupancy of 76.3 percent (-1.2 percentage points).

## Comparison to International Markets

When compared to international “sun and sea” destinations, Hawai'i's counties ranked among the top 10 markets for RevPAR<sup>1</sup> during 2019. Hotels in French Polynesia ranked highest in RevPAR at \$393 (+7.3%), followed by Maldives at \$356 (-0.2%). Maui County ranked third, with Kaua'i, the island of Hawai'i, and O'ahu ranked fifth, sixth, and seventh, respectively (Figure 6).

French Polynesia also led in ADR at \$566 (+2.9%), followed by Maldives at \$542 (+1.8%). Maui County ranked third, with Kaua'i, the island of Hawai'i, and O'ahu ranked sixth, seventh, and eighth, respectively (Figure 7).

O'ahu led in occupancy for sun and sea destinations, followed by Maui County, the island of Hawai'i, and Kaua'i (Figure 8).

## December 2019 Hotel Performance

Hotel performance was strong statewide in December 2019. RevPAR statewide grew to \$282 (+12.5%), with ADR at \$352 (+6.8%) and occupancy of 80.2 percent (+4.1 percentage points) (Figure 9).

Hawai'i hotel room revenues statewide increased 11.7 percent to \$469.2 million in December. There were nearly 58,000 more occupied room nights (+4.5%) and nearly 13,000 fewer available room nights (-0.8%) compared to a year ago (Figure 10). Several hotel properties across the state were closed for renovation or had rooms out of service for renovation during December. However, the number of rooms out of service may be under-reported.

All classes of hotel properties reported growth in December compared to 2018. Luxury Class properties earned RevPAR of \$582 (+10.9%), with ADR at \$794 (+4.7%) and 73.3 percent occupancy (+4.1 percentage points). Midscale & Economy Class hotels reported RevPAR of \$175 (+13.4%) with ADR at \$214 (+6.5%) and occupancy of 81.5 percent (+5.0 percentage points).

In December, Maui County hotels reported the highest RevPAR of all four counties at \$415 (+18.4%), which was supported by increases in both ADR to \$540 (+7.7%) and occupancy of 76.8 percent (+6.9 percentage points). Maui's luxury resort region of Wailea reported RevPAR of \$760 (+18.7%), with growth in both ADR (\$890, +13.7%) and occupancy (85.4%, +3.6 percentage points).

O'ahu hotels earned 8.6 percent RevPAR growth to \$237, driven by higher ADR (\$286, +6.4%) and occupancy of 82.8 percent (+1.7 percentage points). Waikiki hotels reported growth in RevPAR, ADR, and occupancy for December.

Hotels on the island of Hawai'i saw increases in RevPAR to \$263 (+20.5%), ADR to \$330 (+5.9%), and occupancy to 79.5.5 percent (+9.6 percentage points) in December compared to a year ago. In May 2018, Kilauea volcano started erupting in lower Puna, which contributed to a downturn in visitors to the island of Hawai'i in succeeding months.

RevPAR for Kaua'i hotels was \$245 (+3.9%) in December, with growth in occupancy (72.5%, +3.3 percentage points) offsetting slightly lower ADR (\$338, -0.8%).

---

<sup>1</sup> Revenue per available room and average daily rates for international destinations are reported in U.S. dollars.

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 December 2019, the survey included 166 properties representing 46,980 rooms, or 87.6 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 Year-to-Date December 2019**

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
<b>State of Hawai'i</b>	81.2%	80.3%	0.9%	\$282.56	\$275.75	2.5%	\$229.32	\$221.34	3.6%
Luxury Class	76.0%	74.5%	1.5%	\$566.64	\$555.81	1.9%	\$430.77	\$414.12	4.0%
Upper Upscale Class	83.3%	83.2%	0.1%	\$281.75	\$273.01	3.2%	\$234.66	\$227.20	3.3%
Upscale Class	78.1%	76.6%	1.5%	\$209.59	\$205.12	2.2%	\$163.78	\$157.14	4.2%
Upper Midscale Class	85.0%	82.9%	2.1%	\$163.48	\$158.63	3.1%	\$138.90	\$131.52	5.6%
Midscale & Economy Class	81.2%	81.4%	-0.2%	\$176.98	\$177.91	-0.5%	\$143.69	\$144.75	-0.7%
<b>O'ahu</b>	84.2%	83.7%	0.4%	\$240.76	\$236.06	2.0%	\$202.62	\$197.65	2.5%
Waikiki	84.5%	84.1%	0.4%	\$236.04	\$231.46	2.0%	\$199.51	\$194.75	2.4%
Other O'ahu	82.0%	81.2%	0.8%	\$269.83	\$265.14	1.8%	\$221.22	\$215.34	2.7%
O'ahu Luxury	74.1%	71.1%	3.0%	\$498.25	\$496.66	0.3%	\$369.15	\$353.24	4.5%
O'ahu Upper Upscale	85.2%	86.8%	-1.6%	\$263.92	\$258.45	2.1%	\$224.87	\$224.43	0.2%
O'ahu Upscale	84.5%	81.9%	2.6%	\$195.60	\$193.07	1.3%	\$165.23	\$158.11	4.5%
O'ahu Upper Midscale	85.3%	83.1%	2.1%	\$159.36	\$154.30	3.3%	\$135.87	\$128.30	5.9%
O'ahu Midscale & Economy	86.8%	85.7%	1.1%	\$139.96	\$140.11	-0.1%	\$121.49	\$120.05	1.2%
<b>Maui County</b>	77.7%	75.9%	1.7%	\$399.43	\$386.14	3.4%	\$310.19	\$293.22	5.8%
Wailea	88.4%	87.1%	1.3%	\$618.32	\$584.79	5.7%	\$546.83	\$509.34	7.4%
Lahaina/Kā'anapali/Kapalua	76.5%	75.0%	1.5%	\$334.03	\$322.50	3.6%	\$255.38	\$241.79	5.6%
Other Maui County	79.2%	77.2%	2.0%	\$479.58	\$464.67	3.2%	\$379.74	\$358.55	5.9%
Maui County Luxury	79.9%	77.7%	2.2%	\$659.67	\$643.34	2.5%	\$527.12	\$500.04	5.4%
Maui County Upper Upscale & Upscale	77.7%	76.2%	1.6%	\$314.05	\$300.52	4.5%	\$244.10	\$228.90	6.6%
<b>Island of Hawai'i</b>	77.1%	74.6%	2.5%	\$266.58	\$258.26	3.2%	\$205.40	\$192.66	6.6%
Kohala Coast	77.7%	69.8%	7.9%	\$377.96	\$369.97	2.2%	\$293.66	\$258.28	13.7%
<b>Kaua'i</b>	76.3%	77.5%	-1.2%	\$282.73	\$288.02	-1.8%	\$215.80	\$223.36	-3.4%

Source: STR, Inc. © Copyright 2020 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 by Measure Year-to-Date December 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
<b>State of Hawai'i</b>	19,596.3	19,951.8	-1.8%	15,903.9	16,015.4	-0.7%	4,493.8	4,416.2	1.8%
<b>O'ahu</b>	11,087.2	11,181.2	-0.8%	9,330.9	9,361.9	-0.3%	2,246.5	2,210.0	1.7%
Waikiki	9,499.1	9,607.0	-1.1%	8,029.0	8,083.4	-0.7%	1,895.2	1,871.0	1.3%
<b>Maui County</b>	4,612.3	4,632.6	-0.4%	3,581.8	3,517.8	1.8%	1,430.7	1,358.4	5.3%
Wailea	800.8	800.8	0.0%	708.2	697.5	1.5%	437.9	407.9	7.4%
Lahaina/Kā'anapali/Kapalua	2,579.6	2,591.9	-0.5%	1,972.3	1,943.2	1.5%	658.8	626.7	5.1%
<b>Island of Hawai'i</b>	2,332.1	2,488.9	-6.3%	1,796.9	1,856.8	-3.2%	479.0	479.5	-0.1%
Kohala Coast	1,087.7	1,188.1	-8.5%	845.1	829.4	1.9%	319.4	306.9	4.1%
<b>Kaua'i</b>	1,564.8	1,649.1	-5.1%	1,194.3	1,278.9	-6.6%	337.7	368.3	-8.3%

Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

**Figure 3: Top 5 U.S. Markets – Revenue Per Available Room – YTD December 2019**

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$229.32	3.6%
2	New York, NY	\$220.06	-3.5%
3	San Francisco/San Mateo, CA	\$205.99	4.2%
4	Miami/Hialeah, FL	\$149.19	-2.1%
5	Boston, MA	\$147.41	-2.3%

**Figure 4: Top 5 U.S. Markets – Average Daily Rate – YTD December 2019**

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$282.56	2.5%
2	New York, NY	\$255.16	-2.4%
3	San Francisco/San Mateo, CA	\$251.24	4.1%
4	Boston, MA	\$199.35	0.0%
5	Miami/Hialeah, FL	\$196.52	-1.2%

**Figure 5: Top 5 U.S. Markets – Occupancy – YTD December 2019**

Rank	Destination	Occupancy	Percentage Pt. Change
1	New York, NY	86.2%	-1.0%
2	San Francisco/San Mateo, CA	82.0%	0.1%
3	Hawaiian Islands	81.2%	0.9%
4	Los Angeles/Long Beach, CA	79.7%	0.2%
5	Anaheim/Santa Ana, CA	78.1%	0.5%

**Figure 6: Competitive Sun and Sea Destinations – Revenue per Available Room – YTD December 2019**

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$392.73	7.3%
2	Maldives	\$356.15	-0.2%
3	Maui	\$310.19	5.8%
4	Aruba	\$255.36	6.8%
5	Kaua'i	\$215.80	-3.4%
6	Hawai'i Island	\$205.40	6.6%
7	O'ahu	\$202.62	2.5%
8	Cabo San Lucas+	\$181.15	-5.0%
9	Puerto Rico	\$139.66	1.8%
10	Cancun+	\$124.06	-12.7%
11	Costa Rica	\$117.44	3.2%
12	Fiji	\$113.79	-4.2%
13	Phuket	\$86.82	-6.8%
14	Bali	\$76.10	8.4%
15	Puerto Vallarta+	\$60.47	1.6%

**Figure 7: Competitive Sun and Sea Destinations – Average Daily Rate – YTD December 2019**

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$566.13	2.9%
2	Maldives	\$542.44	1.8%
3	Maui	\$399.43	3.4%
4	Cabo San Lucas+	\$353.71	-7.0%
5	Aruba	\$339.99	7.0%
6	Kaua'i	\$282.73	-1.8%
7	Hawai'i Island	\$266.58	3.2%
8	O'ahu	\$240.76	2.0%
9	Puerto Rico	\$212.33	6.5%
10	Cancun+	\$182.59	-8.7%
11	Costa Rica	\$176.54	5.7%
12	Fiji	\$157.34	-2.5%
13	Phuket	\$122.88	-3.3%
14	Bali	\$109.12	7.6%
15	Puerto Vallarta+	\$90.02	-2.5%

**Figure 8: Competitive Sun and Sea Destinations – Occupancy – YTD December 2019**

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	84.2%	0.4%
2	Maui	77.7%	1.7%
3	Hawai'i Island	77.1%	2.5%
4	Kaua'i	76.3%	-1.2%
5	Aruba	75.1%	-0.1%
6	Fiji	72.3%	-1.3%
7	Phuket	70.7%	-2.6%
8	Bali	69.7%	0.5%
9	French Polynesia	69.4%	2.9%
10	Cancun+	67.9%	-3.1%
11	Puerto Vallarta+	67.2%	2.7%
12	Costa Rica	66.5%	-1.6%
13	Puerto Rico	65.8%	-3.1%
14	Maldives	65.7%	-1.3%
15	Cabo San Lucas+	51.2%	1.1%

**Figure 9: Hawai'i Hotel Performance December 2019**

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
<b>State of Hawai'i</b>	80.2%	76.1%	4.1%	\$352.12	\$329.61	6.8%	\$282.36	\$250.89	12.5%
Luxury Class	73.3%	69.2%	4.1%	\$793.96	\$758.46	4.7%	\$582.35	\$524.88	10.9%
Upper Upscale Class	81.5%	78.5%	2.9%	\$337.48	\$316.32	6.7%	\$274.97	\$248.41	10.7%
Upscale Class	80.8%	73.4%	7.4%	\$240.67	\$227.02	6.0%	\$194.47	\$166.57	16.7%
Upper Midscale Class	82.3%	80.3%	1.9%	\$194.71	\$179.81	8.3%	\$160.17	\$144.45	10.9%
Midscale & Economy Class	81.5%	76.6%	5.0%	\$214.28	\$201.20	6.5%	\$174.70	\$154.06	13.4%
<b>O'ahu</b>	82.8%	81.1%	1.7%	\$286.48	\$269.32	6.4%	\$237.22	\$218.37	8.6%
Waikiki	83.2%	81.2%	2.0%	\$278.93	\$261.63	6.6%	\$232.06	\$212.52	9.2%
Other O'ahu	80.5%	80.2%	0.3%	\$331.91	\$316.28	4.9%	\$267.24	\$253.70	5.3%
O'ahu Luxury	75.4%	69.9%	5.6%	\$634.37	\$627.85	1.0%	\$478.50	\$438.65	9.1%
O'ahu Upper Upscale	82.8%	83.3%	-0.5%	\$306.54	\$289.40	5.9%	\$253.84	\$241.09	5.3%
O'ahu Upscale	86.8%	81.7%	5.1%	\$226.46	\$210.65	7.5%	\$196.52	\$172.04	14.2%
O'ahu Upper Midscale	82.1%	80.6%	1.5%	\$188.87	\$174.77	8.1%	\$155.04	\$140.79	10.1%
O'ahu Midscale & Economy	87.0%	81.6%	5.4%	\$167.30	\$152.33	9.8%	\$145.47	\$124.22	17.1%
<b>Maui County</b>	76.8%	69.8%	6.9%	\$540.05	\$501.31	7.7%	\$414.56	\$350.14	18.4%
Wailea	85.4%	81.8%	3.6%	\$889.53	\$782.17	13.7%	\$759.78	\$640.09	18.7%
Lahaina/Kā'anapali/Kapalua	75.2%	67.2%	8.0%	\$423.76	\$397.48	6.6%	\$318.69	\$267.19	19.3%
Other Maui County	78.7%	73.2%	5.5%	\$677.52	\$623.06	8.7%	\$533.16	\$456.03	16.9%
Maui County Luxury	74.2%	71.8%	2.5%	\$1,013.02	\$925.63	9.4%	\$751.90	\$664.20	13.2%
Maui County Upper Upscale	77.9%	69.1%	8.8%	\$385.52	\$358.95	7.4%	\$300.34	\$248.04	21.1%
<b>Island of Hawai'i</b>	79.5%	69.9%	9.6%	\$330.38	\$311.87	5.9%	\$262.71	\$218.06	20.5%
Kohala Coast	79.1%	67.7%	11.3%	\$492.32	\$468.37	5.1%	\$389.35	\$317.30	22.7%
<b>Kaua'i</b>	72.5%	69.3%	3.3%	\$338.44	\$341.07	-0.8%	\$245.50	\$236.31	3.9%

Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

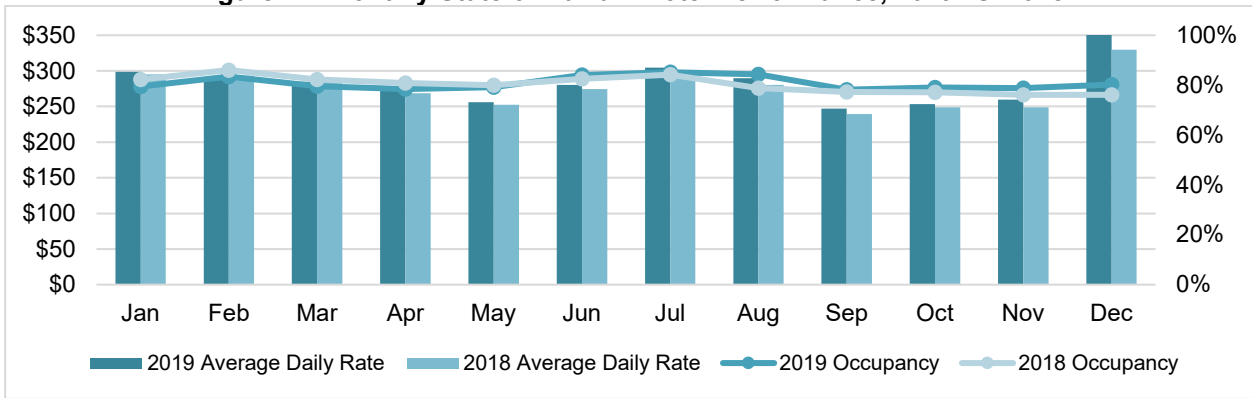
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

**Figure 10: Hawai'i Hotel Performance by Measure December 2019**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
<b>State of Hawai'i</b>	1,661.7	1,674.6	-0.8%	1,332.5	1,274.7	4.5%	469.2	420.1	11.7%
<b>O'ahu</b>	945.3	940.4	0.5%	782.8	762.5	2.7%	224.3	205.3	9.2%
Waikiki	806.7	806.7	0.0%	671.2	655.2	2.4%	187.2	171.4	9.2%
<b>Maui County</b>	388.7	394.6	-1.5%	298.4	275.6	8.3%	161.1	138.2	16.6%
Wailea	68.0	68.0	0.0%	58.1	55.7	4.4%	51.7	43.5	18.7%
Lahaina/Kā'anapali/Kapalua	214.9	221.3	-2.9%	161.6	148.7	8.7%	68.5	59.1	15.8%
<b>Island of Hawai'i</b>	196.0	199.1	-1.6%	155.8	139.2	11.9%	51.5	43.4	18.6%
Kohala Coast	91.1	93.0	-2.0%	72.1	63.0	14.4%	35.5	29.5	20.3%
<b>Kaua'i</b>	131.7	140.5	-6.3%	95.5	97.4	-1.9%	32.3	33.2	-2.6%

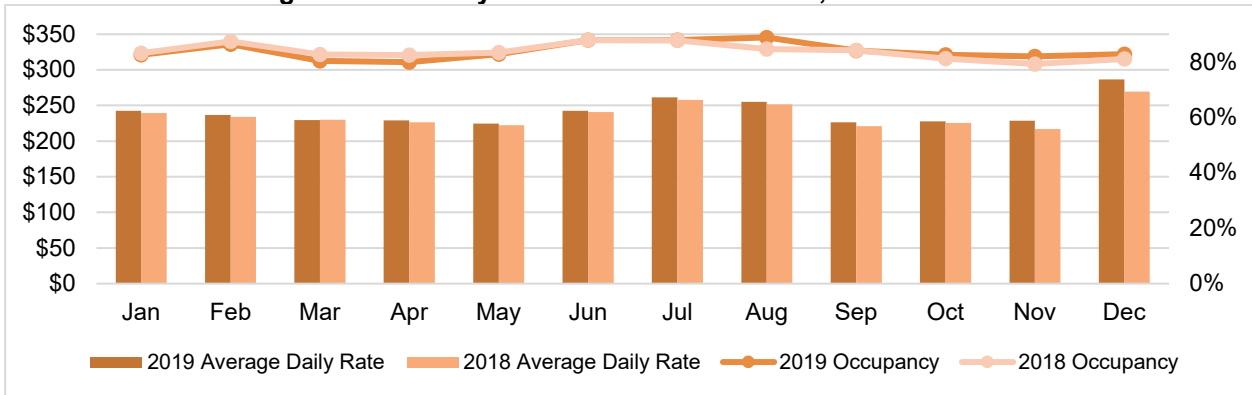
Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

**Figure 11: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018**



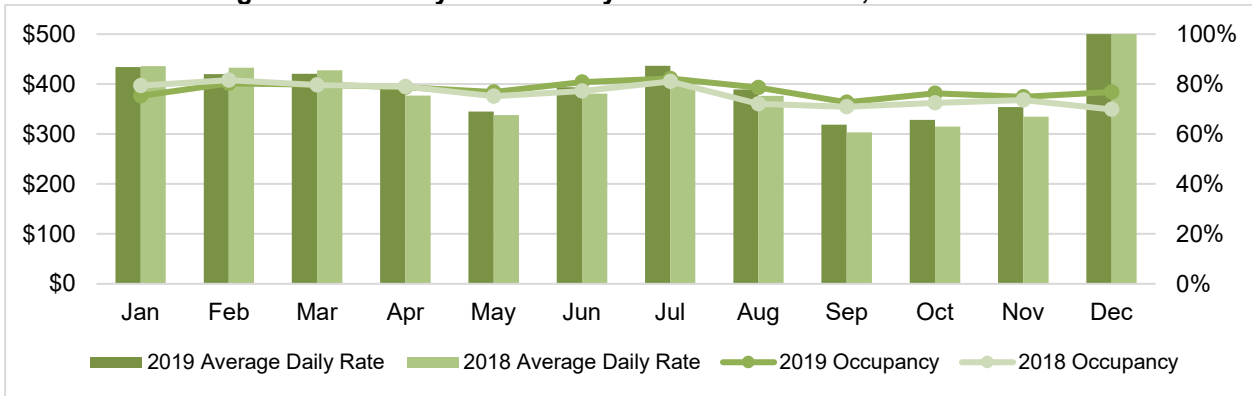
Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.

**Figure 12: Monthly O'ahu Hotel Performance, 2019 vs. 2018**



Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.

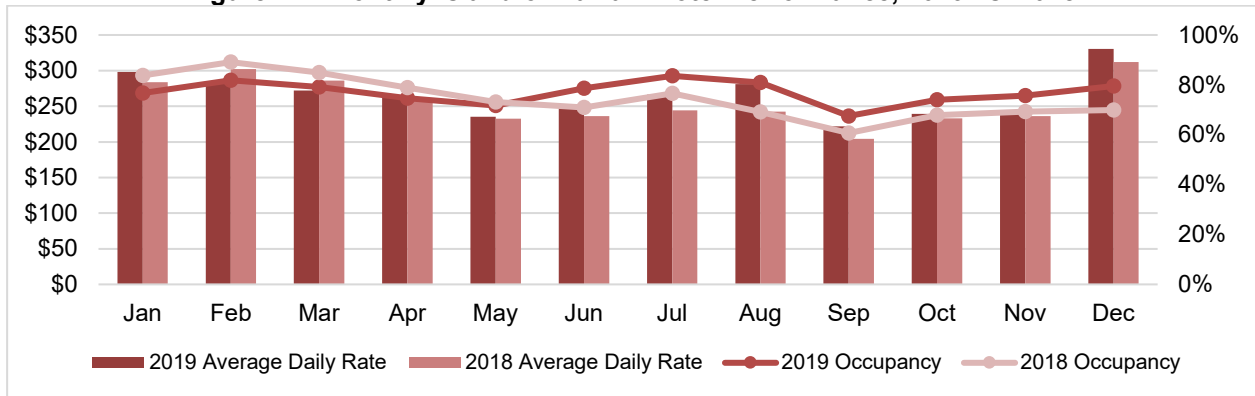
**Figure 13: Monthly Maui County Hotel Performance, 2019 vs. 2018**



Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.

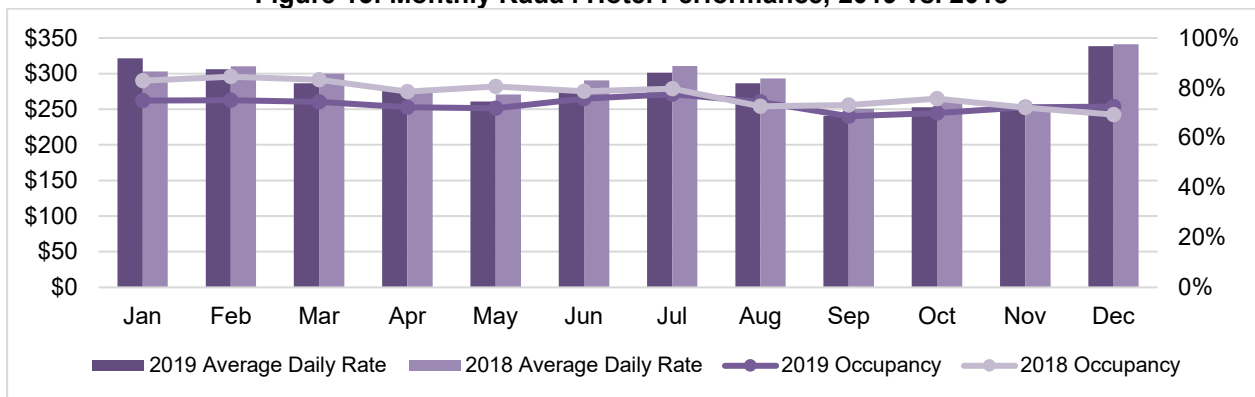


**Figure 14: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018**



Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.

**Figure 15: Monthly Kaua'i Hotel Performance, 2019 vs. 2018**



Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.