



January 2020 Hawaii Hotel Performance Report

In January 2020, Hawaii hotels statewide started the year off strong and reported growth in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to January 2019.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR increased to \$264 (+11.7%), ADR rose to \$314 (+5.6%), and occupancy grew to 84.1 percent (+4.6 percentage points) (Figure 1) in January.

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 January, Hawaii hotel room revenues statewide grew by 10.8 percent to \$439.4 million. Room demand grew by 5.0 percent, or nearly 66,000 room nights, offsetting the nearly 13,400 fewer available room nights (-0.8%) compared to a year ago (Figure 2).

All classes of Hawaii hotel properties statewide reported higher RevPAR, ADR, and occupancy in January year-over-year. Luxury Class properties earned RevPAR of \$493 (+8.9%), with ADR of \$645 (+4.9%) and occupancy at 76.6 percent (+2.8 percentage points). Midscale & Economy Class properties earned RevPAR of \$179 (+14.5%), with ADR of \$204 (+7.6%) and occupancy at 87.6 percent (+5.3 percentage points).

Among Hawaii's four island counties, Maui County hotels led the state overall in RevPAR at \$367 (+11.1%), with increases in both ADR to \$478 (+8.8%) and occupancy of 77.2 percent (+1.5 percentage points) in January.

O'ahu hotels reported 12.9 percent growth in RevPAR to \$223 in January. ADR increased to \$254 (+5.7%) and occupancy rose to 88.0 percent (+5.6 percentage points).

Hotels on the island of Hawaii earned RevPAR of \$261 (+14.1%) in January, with increases in both occupancy (82.0 percent, +5.2 percentage points) and ADR (\$318, +6.9%).

Kauai hotels' RevPAR grew to \$254 (+6.9%) in January, with higher ADR (\$322, +0.6%) and occupancy (79.1 percent, +4.6 percentage points).

Among Hawaii's resort regions, Wailea led for overall RevPAR (\$611, +9.4%) and the Kohala Coast led for RevPAR growth (\$384, +19.0%).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiiauthority.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 January 2020, the survey included 169 properties representing 47,965 rooms, or 89.4 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 January 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	84.1%	79.5%	4.6%	\$314.27	\$297.56	5.6%	\$264.27	\$236.51	11.7%
Luxury Class	76.6%	73.8%	2.8%	\$644.58	\$614.57	4.9%	\$493.47	\$453.28	8.9%
Upper Upscale Class	84.9%	82.0%	2.9%	\$304.58	\$292.50	4.1%	\$258.71	\$239.95	7.8%
Upscale Class	84.6%	76.1%	8.5%	\$236.55	\$223.77	5.7%	\$200.12	\$170.21	17.6%
Upper Midscale Class	87.8%	82.8%	5.0%	\$183.43	\$165.43	10.9%	\$161.04	\$136.97	17.6%
Midscale & Economy Class	87.6%	82.2%	5.3%	\$203.90	\$189.52	7.6%	\$178.52	\$155.85	14.5%
O'ahu	88.0%	82.4%	5.6%	\$253.69	\$240.10	5.7%	\$223.33	\$197.83	12.9%
Waikiki	87.8%	82.9%	4.9%	\$249.00	\$235.39	5.8%	\$218.54	\$195.08	12.0%
Other O'ahu	89.6%	79.5%	10.1%	\$280.54	\$269.85	4.0%	\$251.34	\$214.47	17.2%
O'ahu Luxury	79.8%	68.6%	11.2%	\$542.24	\$527.69	2.8%	\$432.90	\$362.02	19.6%
O'ahu Upper Upscale	86.8%	84.8%	2.0%	\$270.59	\$263.86	2.5%	\$234.90	\$223.86	4.9%
O'ahu Upscale	92.9%	81.4%	11.5%	\$209.41	\$192.15	9.0%	\$194.49	\$156.37	24.4%
O'ahu Upper Midscale	88.0%	82.9%	5.0%	\$173.71	\$156.63	10.9%	\$152.83	\$129.90	17.7%
O'ahu Midscale & Economy	93.5%	86.2%	7.3%	\$149.09	\$131.67	13.2%	\$139.44	\$113.48	22.9%
Maui County	77.2%	75.6%	1.5%	\$477.82	\$438.99	8.8%	\$368.81	\$332.08	11.1%
Wailea	85.2%	85.7%	-0.5%	\$717.29	\$651.71	10.1%	\$611.47	\$558.72	9.4%
Lahaina/Kā'anapali/Kapalua	76.3%	74.1%	2.2%	\$396.85	\$371.00	7.0%	\$302.77	\$274.73	10.2%
Other Maui County	78.3%	77.7%	0.6%	\$575.41	\$521.70	10.3%	\$450.51	\$405.26	11.2%
Maui County Luxury	75.3%	77.0%	-1.8%	\$785.43	\$719.63	9.1%	\$591.18	\$554.43	6.6%
Maui County Upper Upscale & Upscale	77.9%	75.3%	2.6%	\$377.78	\$349.31	8.1%	\$294.32	\$263.02	11.9%
Island of Hawai'i	82.0%	76.8%	5.2%	\$318.32	\$297.89	6.9%	\$261.13	\$228.89	14.1%
Kohala Coast	80.2%	76.3%	3.9%	\$479.43	\$423.40	13.2%	\$384.45	\$323.15	19.0%
Kaua'i	79.1%	74.5%	4.6%	\$322.20	\$320.18	0.6%	\$254.77	\$238.42	6.9%

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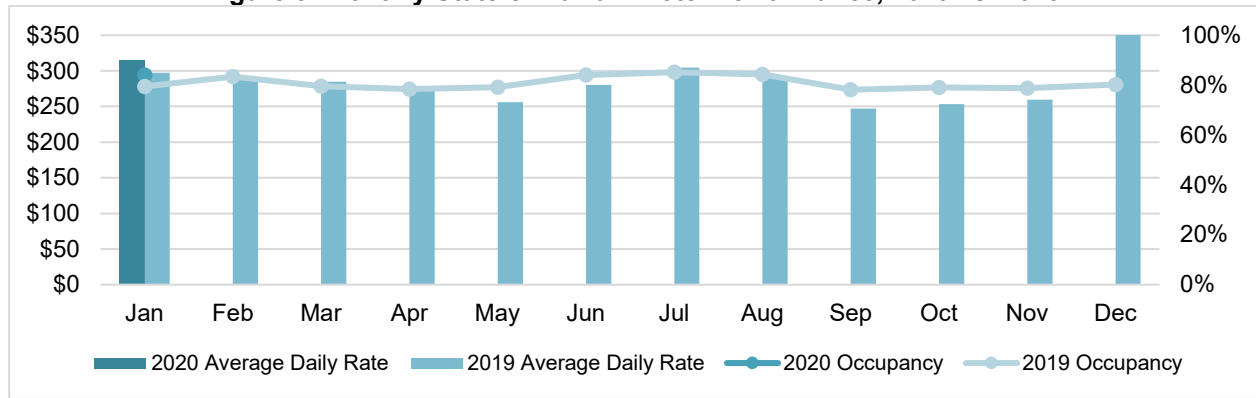
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

Figure 2: Hawai'i Hotel Performance by Measure January 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	1,662.8	1,676.2	-0.8%	1,398.3	1,332.3	5.0%	439.4	396.4	10.8%
O'ahu	947.6	942.5	0.5%	834.2	776.5	7.4%	211.6	186.5	13.5%
Waikiki	809.0	808.8	0.0%	710.1	670.3	5.9%	176.8	157.8	12.1%
Maui County	388.7	394.5	-1.5%	300.0	298.4	0.5%	143.3	131.0	9.4%
Wailea	68.0	68.0	0.0%	58.0	58.3	-0.6%	41.6	38.0	9.4%
Lahaina/Kā'anapali/Kapalua	214.9	221.2	-2.8%	164.0	163.8	0.1%	65.1	60.8	7.1%
Island of Hawai'i	197.5	199.1	-0.8%	162.0	153.0	5.9%	51.6	45.6	13.1%
Kohala Coast	87.0	93.0	-6.4%	69.8	71.0	-1.7%	33.5	30.1	11.4%
Kaua'i	129.1	140.2	-7.9%	102.0	104.4	-2.2%	32.9	33.4	-1.6%

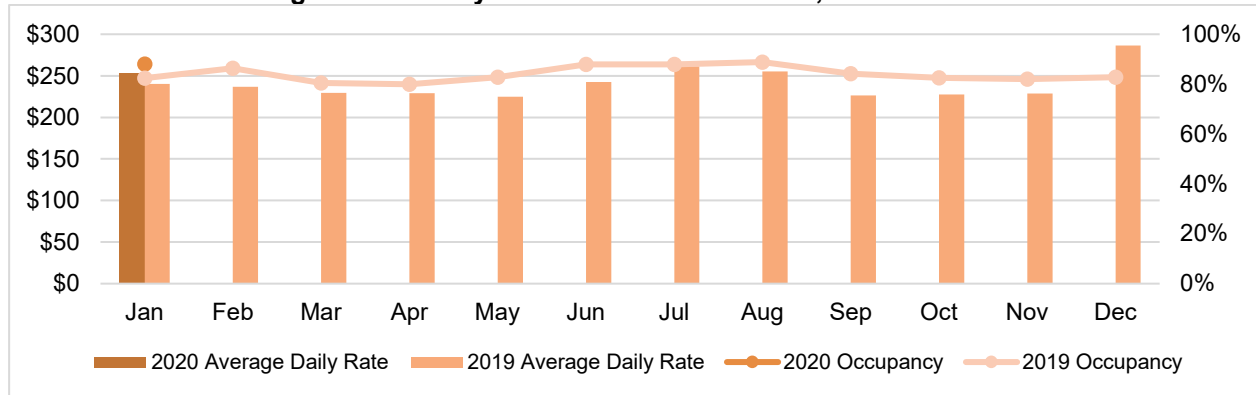
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Figure 3: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



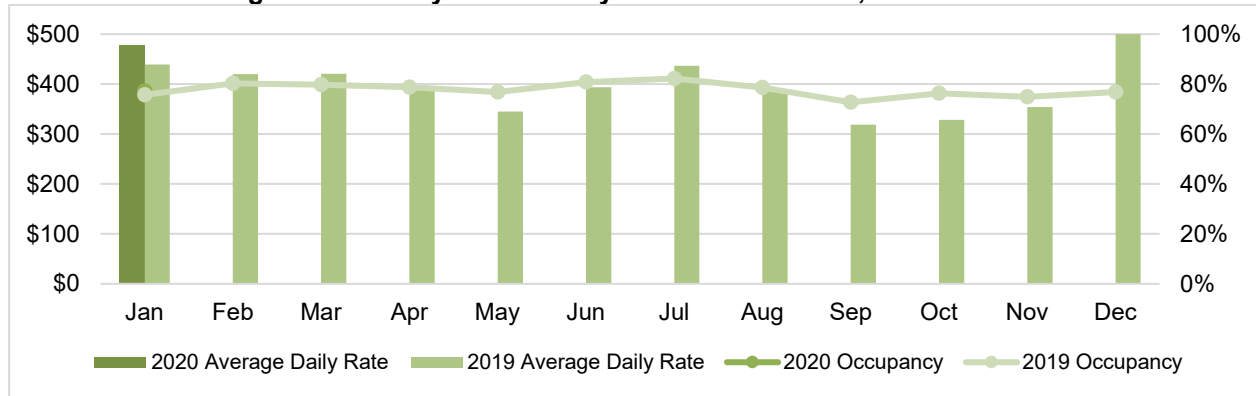
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Figure 4: Monthly O'ahu Hotel Performance, 2020 vs. 2019



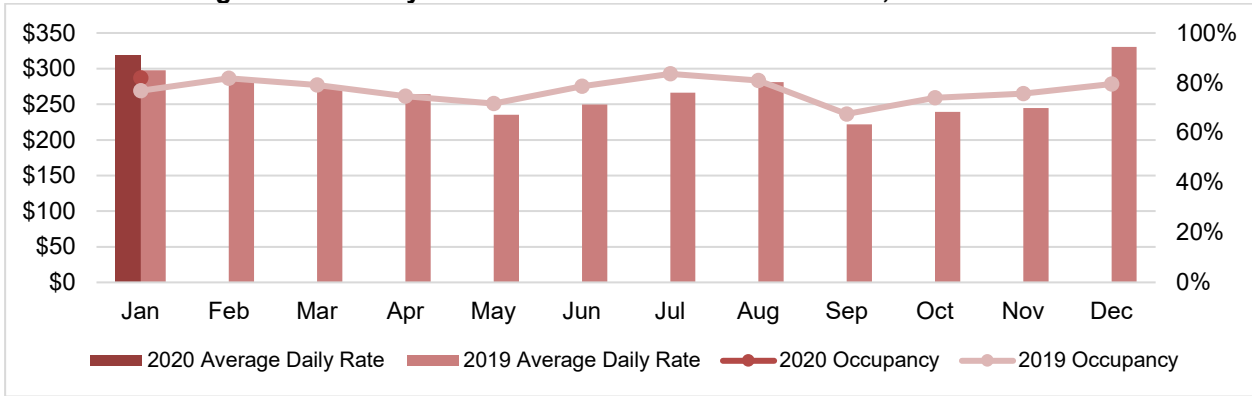
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Figure 5: Monthly Maui County Hotel Performance, 2020 vs. 2019



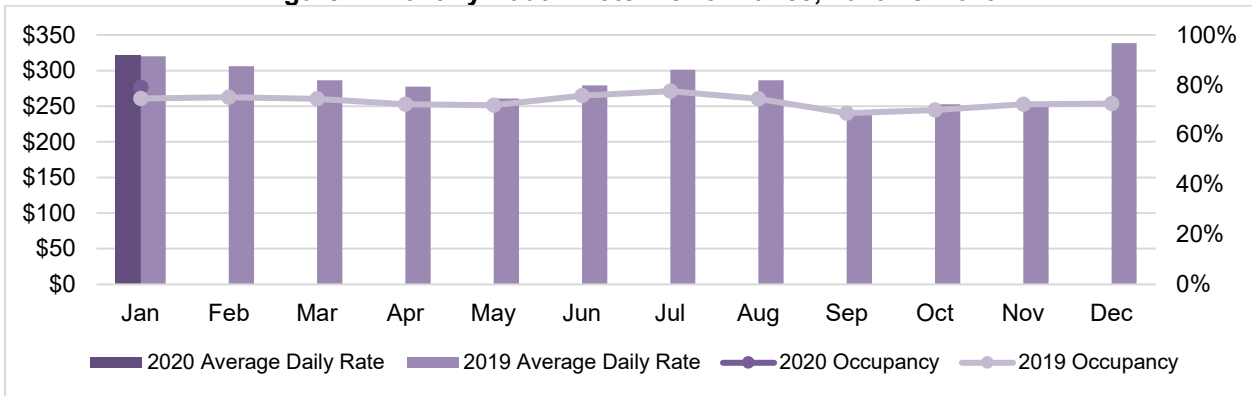
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Figure 6: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



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Figure 7: Monthly Kaua'i Hotel Performance, 2020 vs. 2019



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