



## February 2020 Hawaii Hotel Performance Report

In February 2020, Hawaii hotels statewide reported growth in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to February 2019.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR increased to \$263 (+7.9%), ADR rose to \$310 (+6.4%), and occupancy grew to 84.7 percent (+1.2 percentage points) (Figure 1) in February.

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 February, Hawaii hotel room revenues statewide grew by 7.0 percent to \$394.6 million. Room demand was slightly higher year-over-year (+0.6%), offsetting approximately 12,100 fewer available room nights (-0.8%) (Figure 2).

All classes of Hawaii hotel properties statewide reported higher RevPAR and ADR in February compared to a year ago. Luxury Class properties earned RevPAR of \$486 (+6.5%), with ADR of \$613 (+5.0%) and occupancy at 79.3 percent (+1.1 percentage points). Midscale & Economy Class properties earned RevPAR of \$177 (+5.1%), with ADR of \$204 (+4.4%) and occupancy at 87.2 percent (+0.5 percentage points).

Among Hawaii's four island counties, Maui County hotels led the state overall in RevPAR at \$391 (+11.2%), with increases in both ADR to \$480 (+9.8%) and occupancy of 81.5 percent (+1.1 percentage points) in February. Maui's luxury resort region of Wailea topped the state with RevPAR of \$628 (+7.4%), ADR of \$705 (+8.7%), and occupancy at 89.0 percent (-1.1 percentage points).

O'ahu hotels reported 3.2 percent growth in RevPAR to \$210 in February. ADR increased to \$244 (+3.7%), but occupancy declined to 86.0 percent (-0.4 percentage points). Waikiki hotels earned \$206 (+3.3%) in RevPAR with ADR at \$239 (+4.0%) offsetting occupancy of 86.0 percent (-0.6 percentage points).

Hotels on the island of Hawaii earned RevPAR of \$261 (+12.6%) in February, with increases in both occupancy (84.4 percent, +2.8 percentage points) and ADR (\$309, +8.8%). Properties on the Kohala Coast reported increases in RevPAR, ADR, and occupancy in February.

Kauai hotels' RevPAR grew to \$270 (+18.5%) in February, with higher ADR (\$319, +4.7%) and occupancy (84.6 percent, +9.9 percentage points).

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 February, the survey included 165 properties representing 47,561 rooms, or 88.7 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 February 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	84.7%	83.5%	1.2%	\$310.31	\$291.66	6.4%	\$262.70	\$243.46	7.9%
Luxury Class	79.3%	78.2%	1.1%	\$613.44	\$584.03	5.0%	\$486.40	\$456.82	6.5%
Upper Upscale Class	86.1%	85.0%	1.2%	\$299.94	\$284.37	5.5%	\$258.37	\$241.68	6.9%
Upscale Class	84.5%	80.3%	4.1%	\$239.69	\$227.03	5.6%	\$202.48	\$182.40	11.0%
Upper Midscale Class	85.3%	88.9%	-3.6%	\$181.40	\$170.40	6.5%	\$154.73	\$151.56	2.1%
Midscale & Economy Class	87.2%	86.6%	0.5%	\$203.62	\$194.99	4.4%	\$177.47	\$168.91	5.1%
<b>O'ahu</b>	86.0%	86.5%	-0.4%	\$243.56	\$234.87	3.7%	\$209.54	\$203.06	3.2%
Waikiki	86.0%	86.6%	-0.6%	\$239.45	\$230.19	4.0%	\$205.96	\$199.33	3.3%
Other O'ahu	86.1%	85.6%	0.5%	\$267.51	\$263.52	1.5%	\$230.40	\$225.62	2.1%
O'ahu Luxury	76.7%	73.1%	3.6%	\$493.83	\$486.80	1.4%	\$378.72	\$355.62	6.5%
O'ahu Upper Upscale	85.4%	86.9%	-1.5%	\$261.89	\$256.01	2.3%	\$223.62	\$222.52	0.5%
O'ahu Upscale	91.2%	86.6%	4.5%	\$206.48	\$195.74	5.5%	\$188.21	\$169.59	11.0%
O'ahu Upper Midscale	85.1%	89.6%	-4.5%	\$169.32	\$161.42	4.9%	\$144.03	\$144.58	-0.4%
O'ahu Midscale & Economy	91.0%	92.2%	-1.2%	\$142.13	\$139.32	2.0%	\$129.31	\$128.43	0.7%
<b>Maui County</b>	81.5%	80.4%	1.1%	\$480.05	\$437.36	9.8%	\$391.19	\$351.75	11.2%
Wailea	89.0%	90.1%	-1.1%	\$705.25	\$648.71	8.7%	\$627.98	\$584.47	7.4%
Lahaina/Kā'anapali/Kapalua	81.1%	79.3%	1.8%	\$400.08	\$367.86	8.8%	\$324.29	\$291.63	11.2%
Other Maui County	82.0%	81.9%	0.1%	\$577.81	\$523.21	10.4%	\$473.94	\$428.49	10.6%
Maui County Luxury	80.7%	82.6%	-1.9%	\$753.71	\$694.14	8.6%	\$608.35	\$573.44	6.1%
Maui County Upper Upscale & Upscale	82.4%	80.2%	2.2%	\$389.59	\$352.62	10.5%	\$321.14	\$282.91	13.5%
<b>Island of Hawai'i</b>	84.4%	81.6%	2.8%	\$308.83	\$283.74	8.8%	\$260.51	\$231.40	12.6%
Kohala Coast	83.2%	81.8%	1.4%	\$456.48	\$394.63	15.7%	\$379.90	\$322.92	17.6%
<b>Kaua'i</b>	84.6%	74.7%	9.9%	\$318.54	\$304.37	4.7%	\$269.50	\$227.38	18.5%

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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 February 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	1,501.9	1,514.0	-0.8%	1,271.5	1,263.8	0.6%	394.6	368.6	7.0%
<b>O'ahu</b>	855.9	851.3	0.5%	736.4	736.0	0.1%	179.3	172.9	3.8%
Waikiki	730.7	730.5	0.0%	628.5	632.6	-0.6%	150.5	145.6	3.4%
<b>Maui County</b>	351.1	356.3	-1.5%	286.1	286.6	-0.2%	137.3	125.3	9.6%
Wailea	61.4	61.4	0.0%	54.7	55.3	-1.2%	38.6	35.9	7.4%
Lahaina/Kā'anapali/Kapalua	194.1	199.8	-2.8%	157.4	158.4	-0.7%	63.0	58.3	8.1%
<b>Island of Hawai'i</b>	178.4	179.8	-0.8%	150.5	146.7	2.6%	46.5	41.6	11.6%
Kohala Coast	78.6	84.0	-6.4%	65.4	68.7	-4.8%	29.9	27.1	10.1%
<b>Kaua'i</b>	116.6	126.6	-7.9%	98.6	94.6	4.3%	31.4	28.8	9.1%

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**Figure 3: Hawai'i Hotel Performance Year-to-Date February 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	84.4%	81.4%	3.0%	\$312.59	\$294.69	6.1%	\$263.73	\$239.81	10.0%
Luxury Class	77.9%	75.9%	2.0%	\$631.26	\$599.63	5.3%	\$491.73	\$454.96	8.1%
Upper Upscale Class	85.5%	83.4%	2.1%	\$302.44	\$288.57	4.8%	\$258.64	\$240.77	7.4%
Upscale Class	84.5%	78.1%	6.4%	\$238.04	\$225.36	5.6%	\$201.24	\$176.00	14.3%
Upper Midscale Class	86.6%	85.7%	0.9%	\$181.63	\$167.88	8.2%	\$157.30	\$143.90	9.3%
Midscale & Economy Class	87.4%	84.3%	3.0%	\$203.77	\$192.19	6.0%	\$178.02	\$162.05	9.9%
<b>O'ahu</b>	87.1%	84.3%	2.8%	\$248.99	\$237.56	4.8%	\$216.84	\$200.32	8.2%
Waikiki	86.9%	84.6%	2.3%	\$244.57	\$232.86	5.0%	\$212.63	\$197.10	7.9%
Other O'ahu	87.9%	82.4%	5.6%	\$274.48	\$266.73	2.9%	\$241.40	\$219.76	9.8%
O'ahu Luxury	78.3%	70.7%	7.6%	\$522.34	\$507.64	2.9%	\$409.22	\$358.98	14.0%
O'ahu Upper Upscale	86.1%	85.8%	0.3%	\$266.50	\$260.09	2.5%	\$229.59	\$223.22	2.9%
O'ahu Upscale	92.1%	83.9%	8.2%	\$208.02	\$193.91	7.3%	\$191.50	\$162.64	17.7%
O'ahu Upper Midscale	86.6%	86.1%	0.5%	\$170.72	\$158.99	7.4%	\$147.83	\$136.87	8.0%
O'ahu Midscale & Economy	92.3%	89.0%	3.3%	\$145.84	\$135.43	7.7%	\$134.63	\$120.57	11.7%
<b>Maui County</b>	79.2%	77.9%	1.3%	\$478.91	\$438.19	9.3%	\$379.43	\$341.42	11.1%
Wailea	87.0%	87.8%	-0.8%	\$711.45	\$650.25	9.4%	\$619.30	\$570.94	8.5%
Lahaina/Kā'anapali/Kapalua	78.6%	76.5%	2.0%	\$398.43	\$369.46	7.8%	\$312.98	\$282.75	10.7%
Other Maui County	80.1%	79.7%	0.4%	\$576.58	\$522.44	10.4%	\$461.63	\$416.28	10.9%
Maui County Luxury	77.9%	79.7%	-1.8%	\$769.82	\$707.09	8.9%	\$599.33	\$563.45	6.4%
Maui County Upper Upscale & Upscale	80.1%	77.6%	2.4%	\$383.55	\$350.93	9.3%	\$307.05	\$272.46	12.7%
<b>Island of Hawai'i</b>	83.1%	79.1%	4.1%	\$313.75	\$290.96	7.8%	\$260.84	\$230.08	13.4%
Kohala Coast	81.6%	78.9%	2.7%	\$468.32	\$409.25	14.4%	\$382.29	\$323.04	18.3%
<b>Kaua'i</b>	81.8%	74.6%	7.2%	\$322.82	\$312.67	3.2%	\$264.03	\$233.18	13.2%

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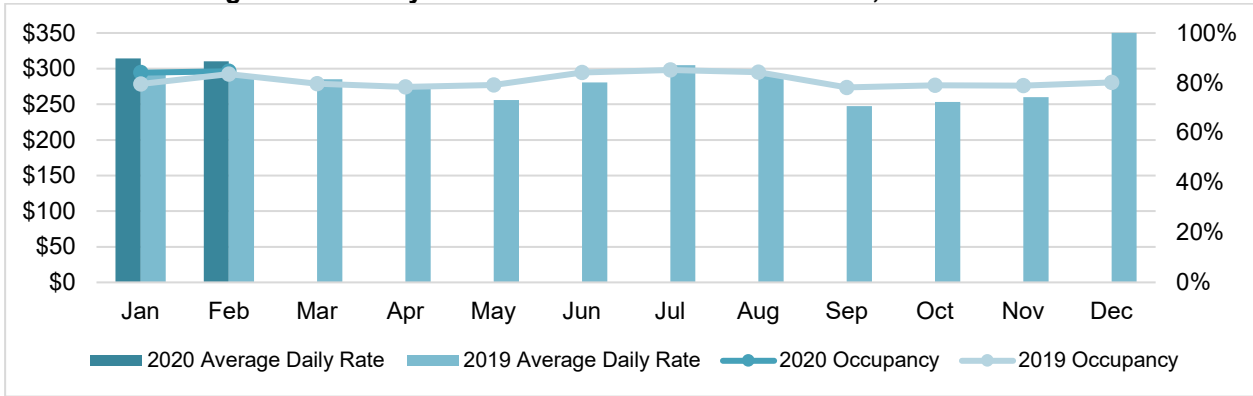
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

**Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date February 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	3,164.8	3,190.2	-0.8%	2,670.1	2,596.1	2.8%	834.6	765.0	9.1%
<b>O'ahu</b>	1,803.6	1,793.7	0.5%	1,570.7	1,512.5	3.8%	391.1	359.3	8.8%
Waikiki	1,539.8	1,539.3	0.0%	1,338.7	1,302.9	2.8%	327.4	303.4	7.9%
<b>Maui County</b>	739.7	750.8	-1.5%	586.1	585.0	0.2%	280.7	256.3	9.5%
Wailea	129.4	129.4	0.0%	112.7	113.7	-0.9%	80.2	73.9	8.5%
Lahaina/Kā'anapali/Kapalua	409.0	421.0	-2.8%	321.3	322.2	-0.3%	128.0	119.0	7.6%
<b>Island of Hawai'i</b>	375.8	379.0	-0.8%	312.4	299.7	4.3%	98.0	87.2	12.4%
Kohala Coast	165.7	177.0	-6.4%	135.2	139.7	-3.2%	63.3	57.2	10.8%
<b>Kaua'i</b>	245.6	266.7	-7.9%	200.9	198.9	1.0%	64.8	62.2	4.3%

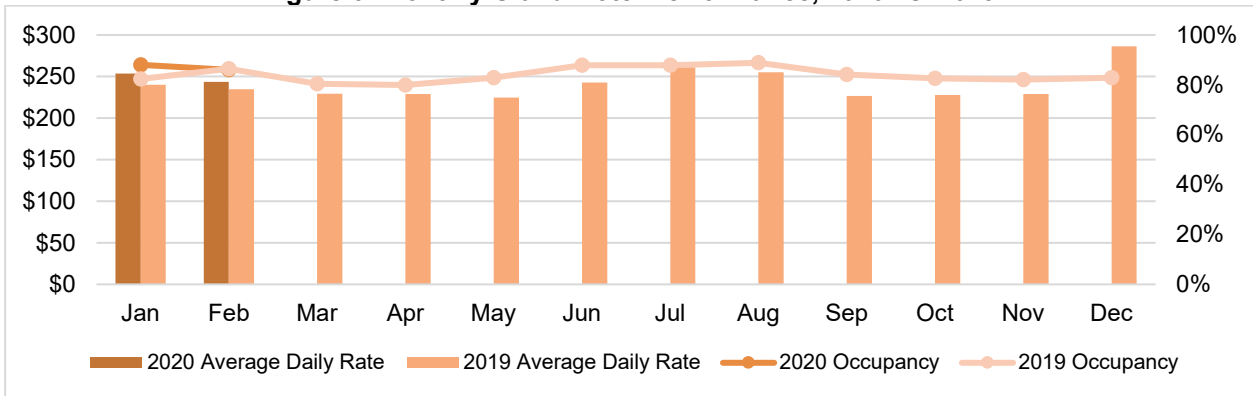
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**Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019**



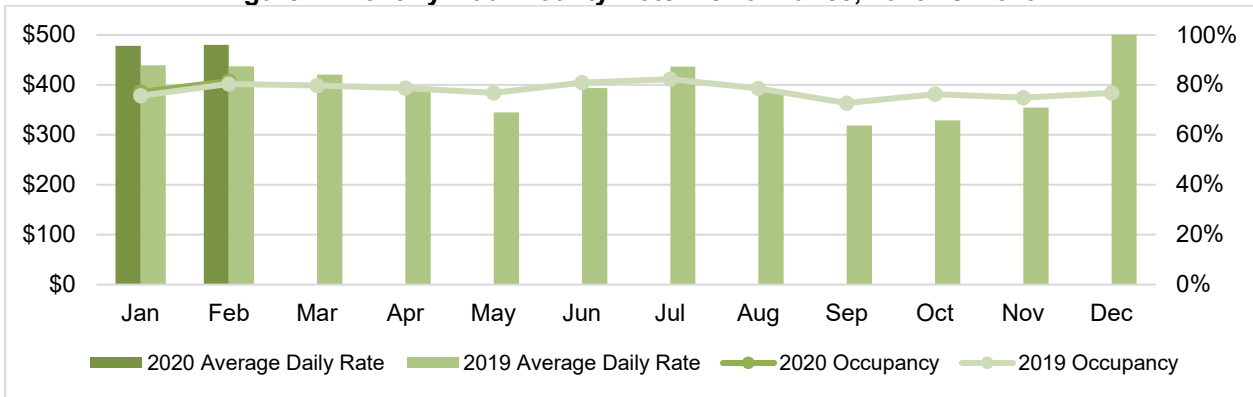
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**Figure 6: Monthly O'ahu Hotel Performance, 2020 vs. 2019**



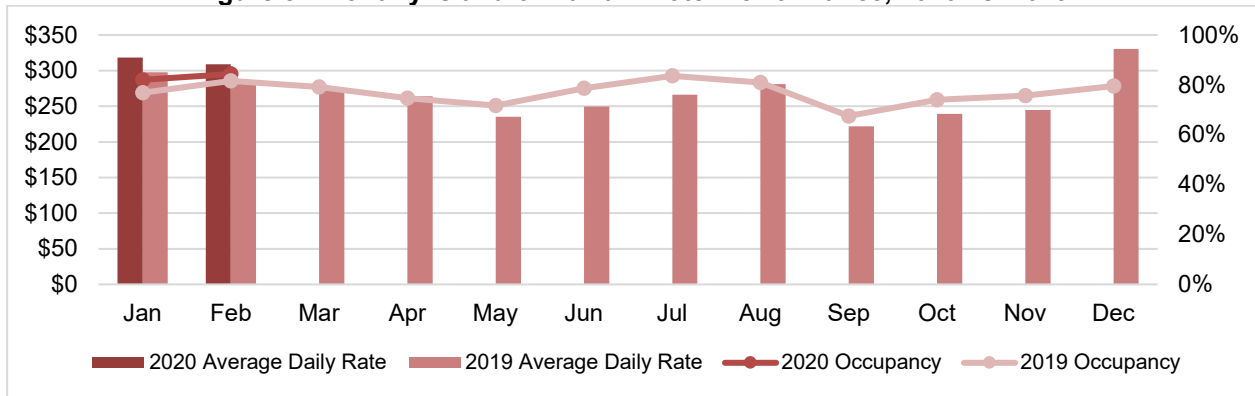
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**Figure 7: Monthly Maui County Hotel Performance, 2020 vs. 2019**



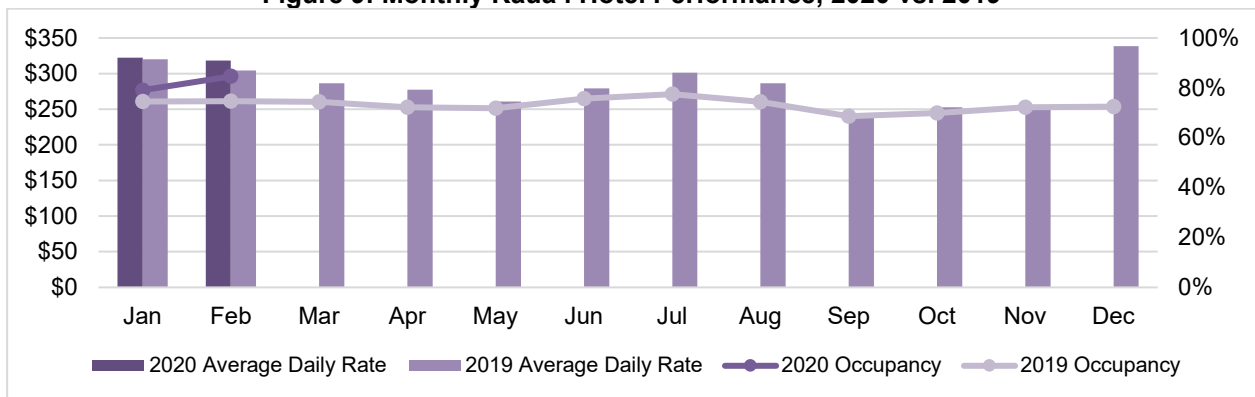
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**Figure 8: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019**



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**Figure 9: Monthly Kaua'i Hotel Performance, 2020 vs. 2019**



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