



May 2019 Hawaii Hotel Performance Report

In May 2019, Hawaii hotels statewide reported that revenue per available room (RevPAR) was flat overall compared to May 2018. A small increase in average daily rate (ADR) helped to counterbalance a small decline in occupancy.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR was \$203 (+0.3%), with ADR of \$256 (+1.3%) and occupancy of 79.2 percent (-0.8 percentage points) (Figure 1) in May.

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 May, Hawaii hotel room revenues statewide were down 1.2 percent to \$339.3 million. There were nearly 26,000 fewer available room nights (-1.5%) in May and approximately 34,000 fewer occupied room nights (-2.5%) 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 May.

Among the classes of Hawaii hotel properties statewide, Luxury Class and Upper Midscale Class properties reported RevPAR growth in May. Luxury Class properties reported RevPAR of \$362 (+1.0%) with ADR of \$482 (-1.6%) and occupancy of 75.1 percent (+1.9 percentage points). Upper Midscale Class hotels reported RevPAR of \$132 (+8.0%), a result of increases in both ADR to \$154 (+3.0%) and occupancy of 85.5 percent (+3.9 percentage points).

Among Hawaii's four island counties, Maui County hotels led in RevPAR at \$265 (+4.3%) in May. Both ADR at \$345 (+2.1%) and occupancy at 76.8 percent (+1.6 percentage points) increased year-over-year. Hotels in the Wailea resort region led the state in RevPAR at \$440 (+0.3%) in May. The Lahaina/Kā'anapali/Kapalua region also reported improvements across all measures in May compared to a year ago.

Hotels on O'ahu produced results in May similar to last year, with a small increase in ADR (+1.0% to \$225) offsetting a slight decrease in occupancy (82.8%, -0.6 percentage points), resulting in flat RevPAR (\$186, +0.3%). Hotels in Waikīkī also reported results in May similar to a year ago.

Hotels on the island of Hawaii reported a small decline in RevPAR to \$168 (-0.9%) in May, with ADR of \$235 (+1.1%) and occupancy at 71.7% (-1.4 percentage points) year-over-year. Kohala Coast hotels, however, reported an increase in RevPAR to \$235 (+9.4%).

Kaua'i hotels' RevPAR fell to \$187 (-14.2%) in May, with declines in both ADR to \$261 (-3.8%) and occupancy of 71.9 percent (-8.7 percentage points).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: 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 May 2019, the survey included 160 properties representing 48,362 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 May 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	79.2%	80.0%	-0.8%	\$256.01	\$252.61	1.3%	\$202.72	\$202.03	0.3%
Luxury Class	75.1%	73.2%	1.9%	\$481.77	\$489.51	-1.6%	\$361.77	\$358.18	1.0%
Upper Upscale Class	80.2%	83.0%	-2.8%	\$264.25	\$256.67	3.0%	\$212.05	\$213.13	-0.5%
Upscale Class	75.2%	76.6%	-1.4%	\$190.66	\$189.70	0.5%	\$143.37	\$145.24	-1.3%
Upper Midscale Class	85.5%	81.6%	3.9%	\$154.11	\$149.56	3.0%	\$131.84	\$122.06	8.0%
Midscale & Economy Class	81.4%	84.2%	-2.8%	\$166.50	\$166.01	0.3%	\$135.51	\$139.83	-3.1%
O'ahu	82.8%	83.4%	-0.6%	\$224.67	\$222.35	1.0%	\$186.10	\$185.50	0.3%
Waikiki	83.4%	84.1%	-0.6%	\$221.67	\$218.76	1.3%	\$184.95	\$183.91	0.6%
Other O'ahu	79.2%	79.5%	-0.3%	\$243.76	\$245.60	-0.7%	\$193.04	\$195.22	-1.1%
O'ahu Luxury	67.7%	66.7%	1.0%	\$449.07	\$461.11	-2.6%	\$304.05	\$307.49	-1.1%
O'ahu Upper Upscale	84.0%	87.5%	-3.5%	\$251.32	\$245.90	2.2%	\$211.05	\$215.21	-1.9%
O'ahu Upscale	82.3%	81.3%	1.0%	\$183.29	\$184.48	-0.6%	\$150.84	\$149.89	0.6%
O'ahu Upper Midscale	86.1%	82.0%	4.1%	\$150.63	\$145.60	3.5%	\$129.70	\$119.40	8.6%
O'ahu Midscale & Economy	86.4%	88.5%	-2.0%	\$130.16	\$133.98	-2.9%	\$112.50	\$118.54	-5.1%
Maui County	76.8%	75.2%	1.6%	\$344.95	\$337.81	2.1%	\$265.08	\$254.07	4.3%
Wailea	86.8%	86.1%	0.7%	\$506.51	\$508.75	-0.4%	\$439.76	\$438.27	0.3%
Lahaina/Kā'anapali/Kapalua	75.3%	73.9%	1.4%	\$293.35	\$284.42	3.1%	\$221.03	\$210.26	5.1%
Other Maui County	78.8%	76.8%	1.9%	\$407.95	\$402.82	1.3%	\$321.30	\$309.52	3.8%
Maui County Luxury	81.7%	76.8%	5.0%	\$536.31	\$554.16	-3.2%	\$438.35	\$425.38	3.0%
Maui County Upper Upscale & Upscale	75.8%	75.5%	0.3%	\$281.63	\$267.99	5.1%	\$213.51	\$202.40	5.5%
Island of Hawai'i	71.7%	73.1%	-1.4%	\$235.08	\$232.61	1.1%	\$168.45	\$169.98	-0.9%
Kohala Coast	71.3%	64.0%	7.3%	\$330.19	\$336.37	-1.8%	\$235.44	\$215.27	9.4%
Kaua'i	71.9%	80.6%	-8.7%	\$260.63	\$270.91	-3.8%	\$187.37	\$218.28	-14.2%

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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 2: Hawai'i Hotel Performance by Measure May 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,673.8	1,699.7	-1.5%	1,325.4	1,359.4	-2.5%	339.3	343.4	-1.2%
O'ahu	941.7	952.5	-1.1%	780.0	794.6	-1.8%	175.2	176.7	-0.8%
Waikiki	808.0	818.8	-1.3%	674.1	688.3	-2.1%	149.4	150.6	-0.8%
Maui County	394.5	392.6	0.5%	303.2	295.3	2.7%	104.6	99.8	4.8%
Wailea	68.0	68.0	0.0%	59.1	58.6	0.8%	29.9	29.8	0.3%
Lahaina/Kā'anapali/Kapalua	221.2	219.3	0.9%	166.7	162.1	2.8%	48.9	46.1	6.0%
Island of Hawai'i	199.1	216.4	-8.0%	142.7	158.2	-9.8%	33.5	36.8	-8.8%
Kohala Coast	93.0	103.6	-10.2%	66.3	66.3	0.0%	21.9	22.3	-1.8%
Kaua'i	138.4	138.2	0.2%	99.5	111.3	-10.6%	25.9	30.2	-14.2%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	80.0%	82.3%	-2.3%	\$279.85	\$278.05	0.6%	\$223.97	\$228.78	-2.1%
Luxury Class	76.1%	77.5%	-1.4%	\$561.87	\$569.06	-1.3%	\$427.35	\$440.78	-3.0%
Upper Upscale Class	81.9%	85.2%	-3.3%	\$279.38	\$273.26	2.2%	\$228.72	\$232.78	-1.7%
Upscale Class	76.0%	78.4%	-2.5%	\$210.27	\$207.48	1.3%	\$159.73	\$162.72	-1.8%
Upper Midscale Class	84.1%	83.2%	0.9%	\$157.75	\$155.30	1.6%	\$132.70	\$129.19	2.7%
Midscale & Economy Class	82.0%	86.0%	-4.0%	\$176.69	\$179.91	-1.8%	\$144.93	\$154.71	-6.3%
O'ahu	82.4%	83.9%	-1.5%	\$231.17	\$229.02	0.9%	\$190.47	\$192.05	-0.8%
Waikiki	82.7%	84.5%	-1.9%	\$226.40	\$224.10	1.0%	\$187.15	\$189.45	-1.2%
Other O'ahu	80.8%	79.7%	1.1%	\$260.63	\$260.95	-0.1%	\$210.52	\$208.01	1.2%
O'ahu Luxury	69.4%	69.7%	-0.3%	\$484.46	\$490.96	-1.3%	\$336.43	\$342.29	-1.7%
O'ahu Upper Upscale	83.8%	87.5%	-3.7%	\$254.74	\$251.24	1.4%	\$213.40	\$219.74	-2.9%
O'ahu Upscale	81.2%	80.3%	0.9%	\$187.20	\$187.36	-0.1%	\$151.98	\$150.42	1.0%
O'ahu Upper Midscale	84.6%	83.4%	1.2%	\$152.72	\$149.29	2.3%	\$129.18	\$124.56	3.7%
O'ahu Midscale & Economy	86.6%	88.9%	-2.3%	\$133.36	\$134.82	-1.1%	\$115.44	\$119.80	-3.6%
Maui County	78.3%	78.8%	-0.5%	\$402.99	\$401.81	0.3%	\$315.67	\$316.80	-0.4%
Wailea	89.1%	88.2%	0.9%	\$610.62	\$612.37	-0.3%	\$544.09	\$540.27	0.7%
Lahaina/Kā'anapali/Kapalua	77.0%	78.1%	-1.1%	\$337.76	\$333.45	1.3%	\$260.02	\$260.40	-0.1%
Other Maui County	80.1%	79.8%	0.3%	\$483.05	\$486.47	-0.7%	\$386.70	\$388.16	-0.4%
Maui County Luxury	82.2%	80.0%	2.1%	\$660.02	\$676.43	-2.4%	\$542.24	\$541.21	0.2%
Maui County Upper Upscale & Upscale	77.9%	79.2%	-1.3%	\$322.15	\$314.53	2.4%	\$251.09	\$249.16	0.8%
Island of Hawai'i	76.7%	81.8%	-5.1%	\$270.96	\$273.87	-1.1%	\$207.76	\$224.09	-7.3%
Kohala Coast	77.1%	76.9%	0.2%	\$382.19	\$394.78	-3.2%	\$294.70	\$303.71	-3.0%
Kaua'i	73.6%	81.9%	-8.3%	\$290.44	\$292.21	-0.6%	\$213.83	\$239.31	-10.6%

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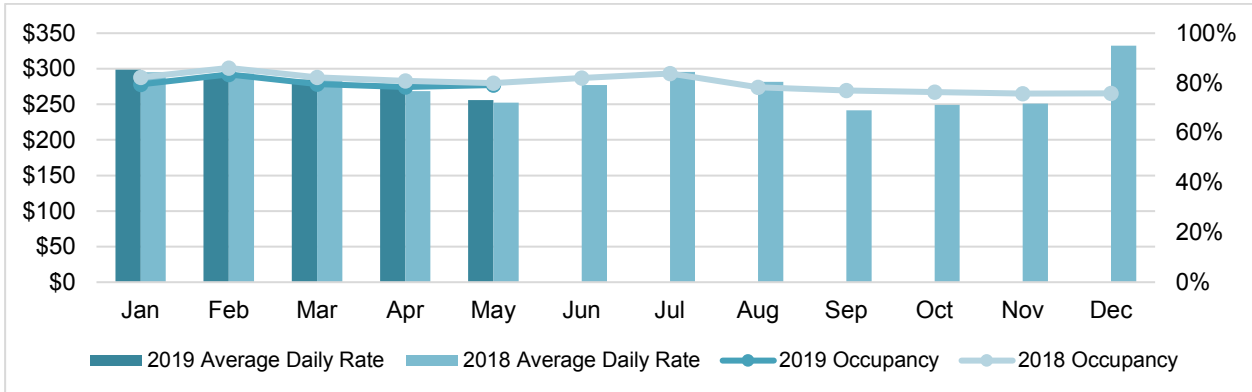
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	8,153.9	8,275.4	-1.5%	6,525.6	6,809.2	-4.2%	1,826.2	1,893.3	-3.5%
O'ahu	4,587.1	4,639.9	-1.1%	3,779.5	3,891.0	-2.9%	873.7	891.1	-2.0%
Waikiki	3,935.8	3,988.6	-1.3%	3,253.4	3,371.8	-3.5%	736.6	755.6	-2.5%
Maui County	1,921.8	1,912.6	0.5%	1,505.4	1,507.9	-0.2%	606.7	605.9	0.1%
Wailea	331.3	331.3	0.0%	295.2	292.3	1.0%	180.3	179.0	0.7%
Lahaina/Kā'anapali/Kapalua	1,077.6	1,068.3	0.9%	829.6	834.3	-0.6%	280.2	278.2	0.7%
Island of Hawai'i	969.9	1,054.3	-8.0%	743.7	862.6	-13.8%	201.5	236.3	-14.7%
Kohala Coast	453.0	504.5	-10.2%	349.3	388.1	-10.0%	133.5	153.2	-12.9%
Kaua'i	675.1	668.7	1.0%	497.1	547.6	-9.2%	144.4	160.0	-9.8%

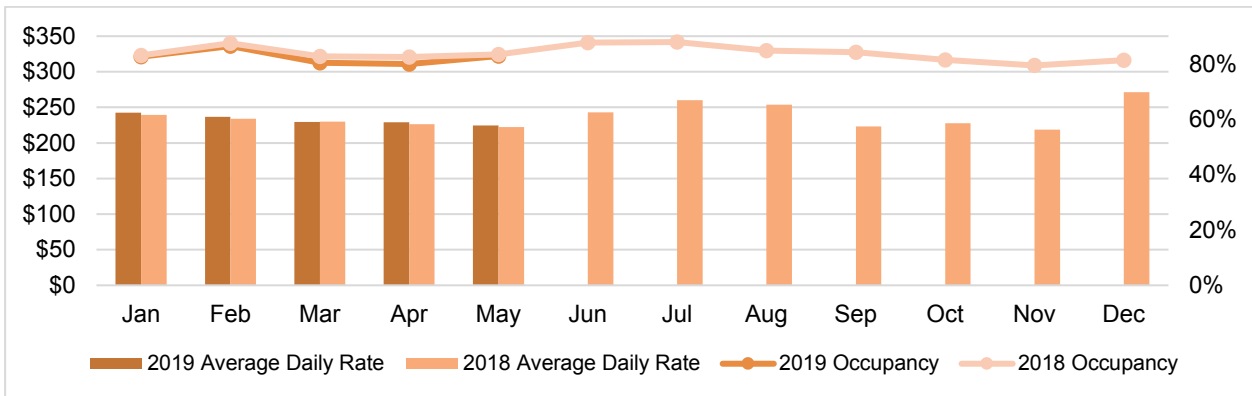
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



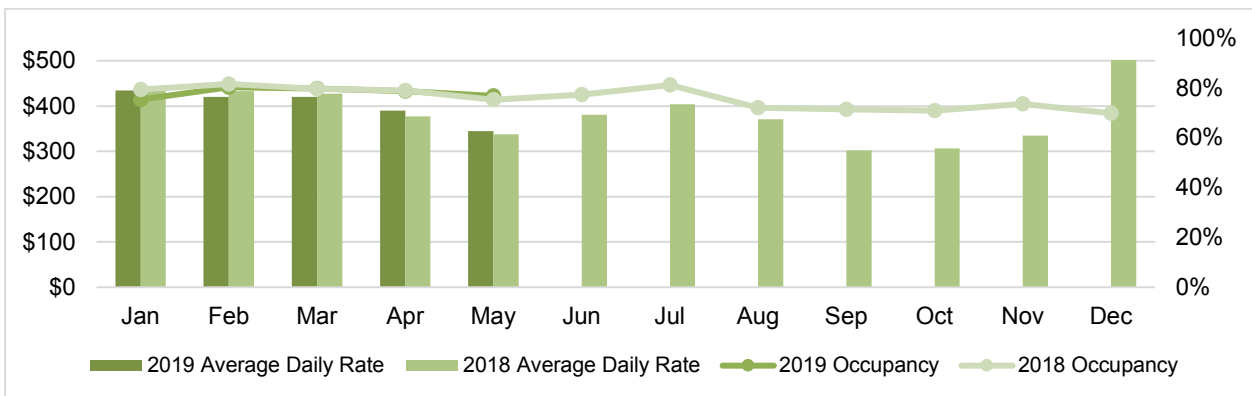
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



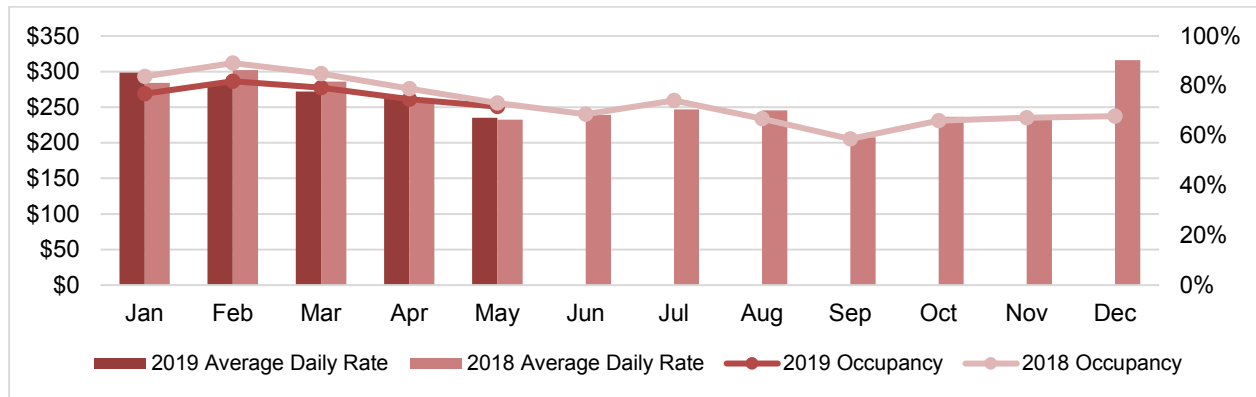
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



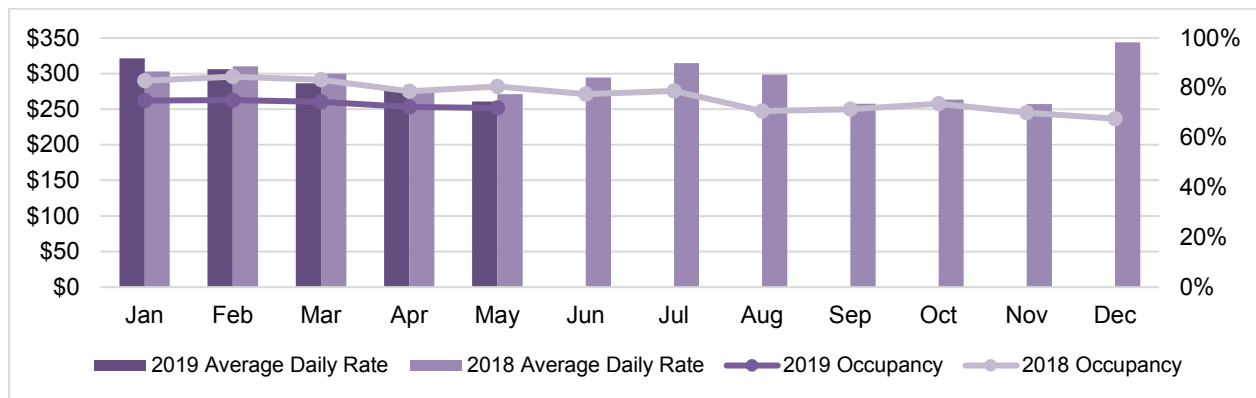
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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



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