



August 2019 Hawaii Hotel Performance Report

In August 2019, Hawaii hotels statewide reported growth in revenue per available room (RevPAR), average daily rate (ADR) and occupancy compared to August 2018. However, it should be noted that August 2018's performance was impacted in part by concerns related to Hurricane Lane.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority (HTA), statewide RevPAR increased to \$244 (+10.7%), with ADR of \$290 (+3.4%) and occupancy of 84.3 percent (+5.5 percentage points) (Figure 1) in August.

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 August, Hawaii hotel room revenues statewide grew by 8.6 percent to \$408.7 million, which is \$32.5 million higher than last year. Room demand was up 5.0 percent to 1.4 million rooms, with supply down 1.8 percent compared to a year ago (Figure 2). There were approximately 31,500 fewer available room nights. Several hotel properties across the state were closed for renovation or had rooms out of service for renovation during August.¹

All classes of Hawaii hotel properties statewide reported RevPAR gains in August. Luxury Class properties reported a strong increase in RevPAR to \$469 (+13.0%), driven by an increase in occupancy to 81.9 percent (+8.9 percentage points) and ADR similar to a year ago. Midscale & Economy Class hotels reported RevPAR of \$146 (+8.8%), with ADR of \$176 (+2.6%) and occupancy of 82.5 percent (+4.7 percentage points).

Among Hawaii's four island counties, Maui County hotels led the state in RevPAR at \$306 (+12.7%), with ADR of \$389 (+3.5%) and occupancy of 78.6 percent (+6.5 percentage points) in August. Maui County was led by the strong performance of properties in Wailea, which earned RevPAR of \$542 (+9.3%), ADR of \$608 (+4.4%) and occupancy of 89.2 percent (+4.0 percentage points).

O'ahu hotels reported RevPAR growth to \$227 (+6.5%) in August, with increases in ADR to \$255 (+1.5%) and occupancy of 88.8 percent (+4.2 percentage points). Waikiki hotels saw RevPAR, ADR and occupancy increases in August.

Hotels on the island of Hawaii saw significant increases in RevPAR to \$227 (+35.6%), ADR of \$281 (+15.8%) and occupancy at 80.9 percent (+11.8 percentage points) in August compared to the same time last year. Kohala Coast hotels earned a 54.5 percent increase in RevPAR to \$342, with ADR of \$406 (+16.1%) and occupancy of 84.3 percent (+21.0 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.

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.

Kaua'i hotels reported flat RevPAR of \$213 (+0.2%) in August, with higher occupancy (74.4%, +1.9 percentage points) offsetting a decrease in ADR to \$286 (-2.3%).

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 August 2019, the survey included 162 properties representing 48,292 rooms, or 89.5 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 August 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	84.3%	78.8%	5.5%	\$289.75	\$280.13	3.4%	\$244.27	\$220.68	10.7%
Luxury Class	81.9%	73.0%	8.9%	\$572.99	\$568.92	0.7%	\$469.19	\$415.24	13.0%
Upper Upscale Class	87.2%	81.6%	5.6%	\$294.53	\$283.25	4.0%	\$256.69	\$231.02	11.1%
Upscale Class	77.9%	75.4%	2.5%	\$205.41	\$200.83	2.3%	\$159.94	\$151.42	5.6%
Upper Midscale Class	89.5%	83.2%	6.3%	\$167.30	\$162.52	2.9%	\$149.76	\$135.18	10.8%
Midscale & Economy Class	82.5%	77.8%	4.7%	\$176.37	\$171.82	2.6%	\$145.59	\$133.76	8.8%
O'ahu	88.8%	84.6%	4.2%	\$255.19	\$251.53	1.5%	\$226.73	\$212.88	6.5%
Waikiki	89.1%	84.7%	4.3%	\$249.20	\$247.04	0.9%	\$221.94	\$209.30	6.0%
Other O'ahu	87.6%	84.1%	3.5%	\$292.02	\$279.18	4.6%	\$255.74	\$234.83	8.9%
O'ahu Luxury	83.6%	75.0%	8.6%	\$530.80	\$538.93	-1.5%	\$443.70	\$403.99	9.8%
O'ahu Upper Upscale	89.9%	87.1%	2.8%	\$278.78	\$276.90	0.7%	\$250.71	\$241.14	4.0%
O'ahu Upscale	86.0%	83.6%	2.4%	\$203.41	\$201.18	1.1%	\$174.96	\$168.16	4.0%
O'ahu Upper Midscale	90.3%	84.0%	6.2%	\$164.07	\$159.26	3.0%	\$148.11	\$133.85	10.7%
O'ahu Midscale & Economy	90.4%	85.5%	4.9%	\$146.86	\$147.99	-0.8%	\$132.76	\$126.52	4.9%
Maui County	78.6%	72.1%	6.5%	\$389.23	\$376.24	3.5%	\$305.98	\$271.43	12.7%
Wailea	89.2%	85.3%	4.0%	\$607.79	\$581.98	4.4%	\$542.37	\$496.33	9.3%
Lahaina/Kā'anapali/Kapalua	76.9%	71.5%	5.4%	\$323.54	\$309.63	4.5%	\$248.73	\$221.31	12.4%
Other Maui County	80.9%	73.0%	7.9%	\$469.85	\$459.43	2.3%	\$379.88	\$335.35	13.3%
Maui County Luxury	84.4%	76.5%	7.9%	\$644.05	\$647.06	-0.5%	\$543.66	\$494.98	9.8%
Maui County Upper Upscale & Upscale	77.8%	72.1%	5.7%	\$303.21	\$285.49	6.2%	\$235.83	\$205.80	14.6%
Island of Hawai'i	80.9%	69.1%	11.8%	\$280.90	\$242.62	15.8%	\$227.36	\$167.69	35.6%
Kohala Coast	84.3%	63.3%	21.0%	\$405.96	\$349.75	16.1%	\$342.35	\$221.54	54.5%
Kaua'i	74.4%	72.6%	1.9%	\$286.40	\$293.07	-2.3%	\$213.21	\$212.74	0.2%

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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 August 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	1,673.3	1,704.7	-1.8%	1,410.6	1,342.9	5.0%	408.7	376.2	8.6%
O'ahu	942.0	952.7	-1.1%	836.9	806.3	3.8%	213.6	202.8	5.3%
Waikiki	808.3	819.0	-1.3%	719.9	693.9	3.7%	179.4	171.4	4.6%
Maui County	392.6	394.4	-0.5%	308.6	284.5	8.5%	120.1	107.0	12.2%
Wailea	68.0	68.0	0.0%	60.7	58.0	4.6%	36.9	33.8	9.3%
Lahaina/Kā'anapali/Kapalua	221.2	221.1	0.1%	170.0	158.0	7.6%	55.0	48.9	12.4%
Island of Hawai'i	199.1	216.4	-8.0%	161.2	149.6	7.7%	45.3	36.3	24.7%
Kohala Coast	93.0	103.6	-10.2%	78.4	65.6	19.5%	31.8	22.9	38.8%
Kaua'i	139.6	141.2	-1.1%	103.9	102.5	1.4%	29.8	30.0	-0.9%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2019	2018	Percentage Pt. Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	81.7%	82.1%	-0.4%	\$284.74	\$279.84	1.8%	\$232.57	\$229.70	1.2%
Luxury Class	77.9%	76.6%	1.3%	\$570.81	\$567.13	0.6%	\$444.88	\$434.55	2.4%
Upper Upscale Class	83.9%	85.2%	-1.4%	\$285.88	\$278.07	2.8%	\$239.80	\$237.04	1.2%
Upscale Class	77.2%	78.2%	-0.9%	\$209.77	\$207.21	1.2%	\$162.02	\$161.94	0.0%
Upper Midscale Class	85.8%	84.0%	1.8%	\$162.49	\$160.30	1.4%	\$139.35	\$134.61	3.5%
Midscale & Economy Class	82.3%	84.3%	-2.0%	\$177.22	\$178.81	-0.9%	\$145.93	\$150.75	-3.2%
O'ahu	84.6%	84.9%	-0.3%	\$239.87	\$237.30	1.1%	\$202.88	\$201.50	0.7%
Waikiki	84.8%	85.4%	-0.6%	\$234.50	\$232.43	0.9%	\$198.78	\$198.47	0.2%
Other O'ahu	83.4%	82.0%	1.5%	\$272.84	\$268.42	1.6%	\$227.67	\$220.01	3.5%
O'ahu Luxury	74.2%	71.6%	2.6%	\$496.70	\$499.17	-0.5%	\$368.31	\$357.18	3.1%
O'ahu Upper Upscale	85.8%	88.3%	-2.5%	\$263.77	\$260.71	1.2%	\$226.37	\$230.32	-1.7%
O'ahu Upscale	83.3%	82.0%	1.4%	\$193.37	\$194.19	-0.4%	\$161.10	\$159.16	1.2%
O'ahu Upper Midscale	86.3%	84.4%	1.9%	\$158.00	\$155.32	1.7%	\$136.36	\$131.04	4.1%
O'ahu Midscale & Economy	87.8%	88.8%	-0.9%	\$138.64	\$141.43	-2.0%	\$121.78	\$125.53	-3.0%
Maui County	79.1%	78.1%	1.0%	\$405.47	\$396.70	2.2%	\$320.67	\$309.71	3.5%
Wailea	89.9%	88.3%	1.6%	\$623.50	\$605.57	3.0%	\$560.33	\$534.82	4.8%
Lahaina/Kā'anapali/Kapalua	78.2%	77.6%	0.5%	\$339.04	\$331.11	2.4%	\$264.98	\$257.00	3.1%
Other Maui County	80.3%	78.6%	1.6%	\$488.25	\$478.69	2.0%	\$391.95	\$376.48	4.1%
Maui County Luxury	82.9%	80.2%	2.7%	\$670.44	\$669.02	0.2%	\$555.74	\$536.32	3.6%
Maui County Upper Upscale & Upscale	78.9%	78.4%	0.5%	\$321.54	\$309.36	3.9%	\$253.70	\$242.54	4.6%
Island of Hawai'i	78.3%	78.2%	0.1%	\$268.99	\$262.41	2.5%	\$210.62	\$205.20	2.6%
Kohala Coast	79.4%	73.2%	6.3%	\$380.81	\$376.17	1.2%	\$302.47	\$275.27	9.9%
Kaua'i	74.2%	80.1%	-5.9%	\$290.36	\$293.40	-1.0%	\$215.58	\$235.00	-8.3%

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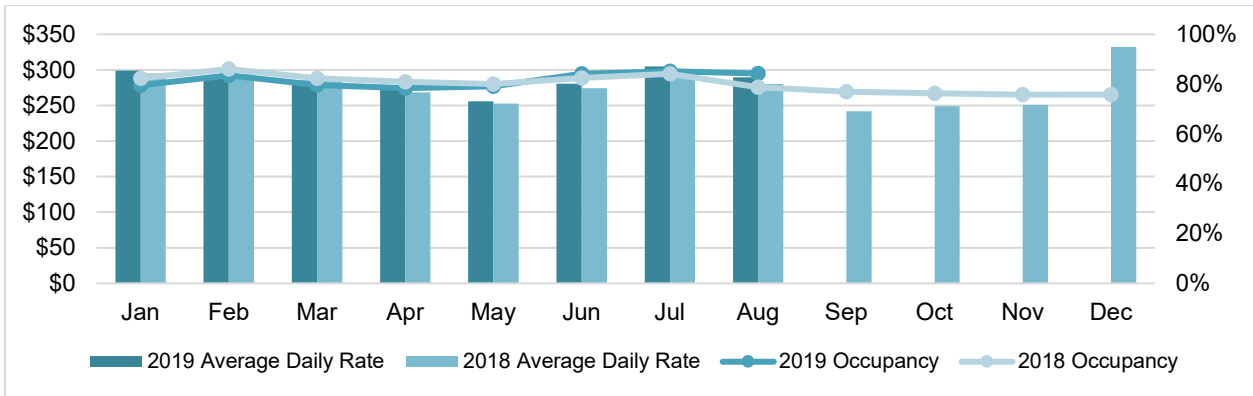
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2019	2018	% Change	2019	2018	% Change	2019	2018	% Change
State of Hawai'i	13,128.5	13,340.3	-1.6%	10,723.0	10,950.1	-2.1%	3,053.3	3,064.3	-0.4%
O'ahu	7,383.9	7,468.1	-1.1%	6,245.1	6,341.2	-1.5%	1,498.0	1,504.8	-0.4%
Waikiki	6,335.8	6,420.1	-1.3%	5,370.6	5,482.2	-2.0%	1,259.4	1,274.2	-1.2%
Maui County	3,088.5	3,079.6	0.3%	2,442.6	2,404.3	1.6%	990.4	953.8	3.8%
Wailea	533.1	533.1	0.0%	479.1	470.9	1.8%	298.7	285.1	4.8%
Lahaina/Kā'anapali/Kapalua	1,733.8	1,721.0	0.7%	1,355.1	1,335.8	1.4%	459.4	442.3	3.9%
Island of Hawai'i	1,560.8	1,696.6	-8.0%	1,222.1	1,326.7	-7.9%	328.7	348.1	-5.6%
Kohala Coast	729.0	811.9	-10.2%	579.0	594.1	-2.5%	220.5	223.5	-1.3%
Kaua'i	1,095.3	1,096.1	-0.1%	813.2	877.9	-7.4%	236.1	257.6	-8.3%

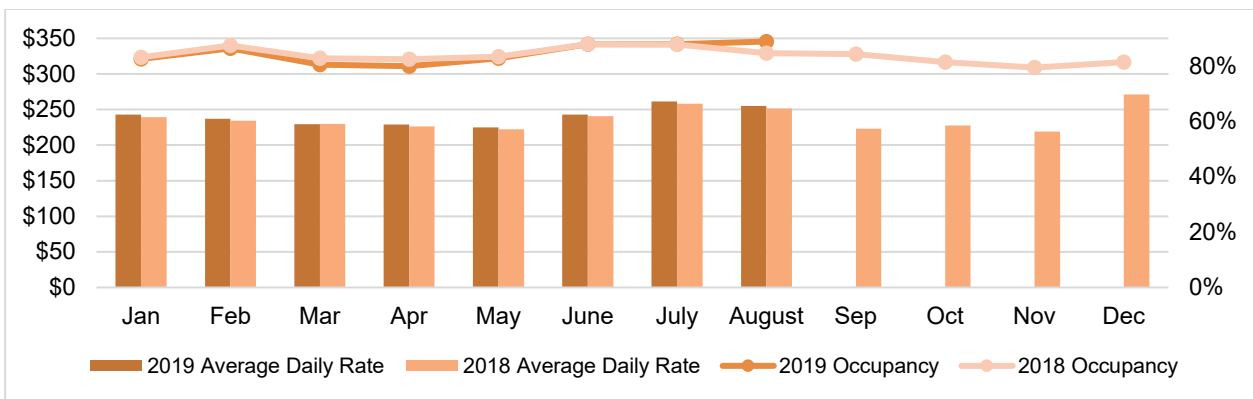
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2019 vs. 2018



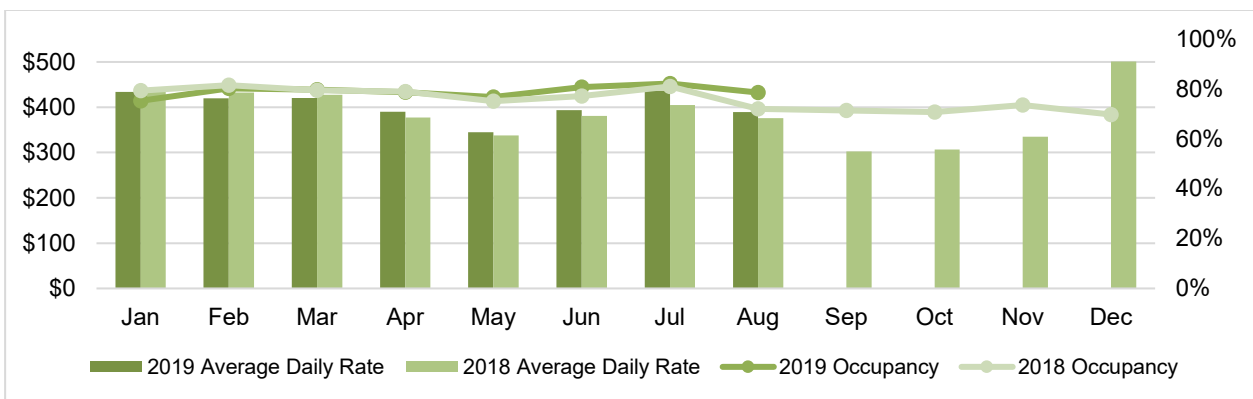
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Figure 6: Monthly O'ahu Hotel Performance, 2019 vs. 2018



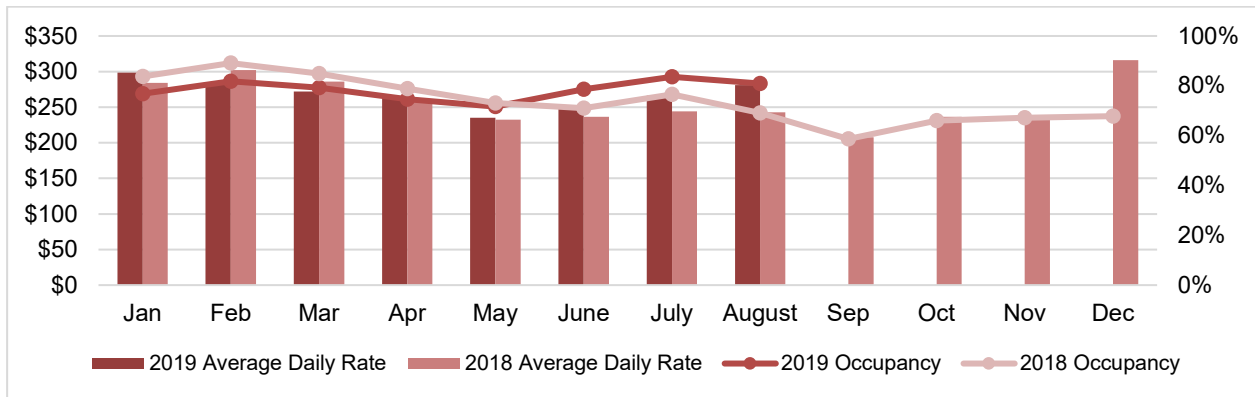
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Figure 7: Monthly Maui County Hotel Performance, 2019 vs. 2018



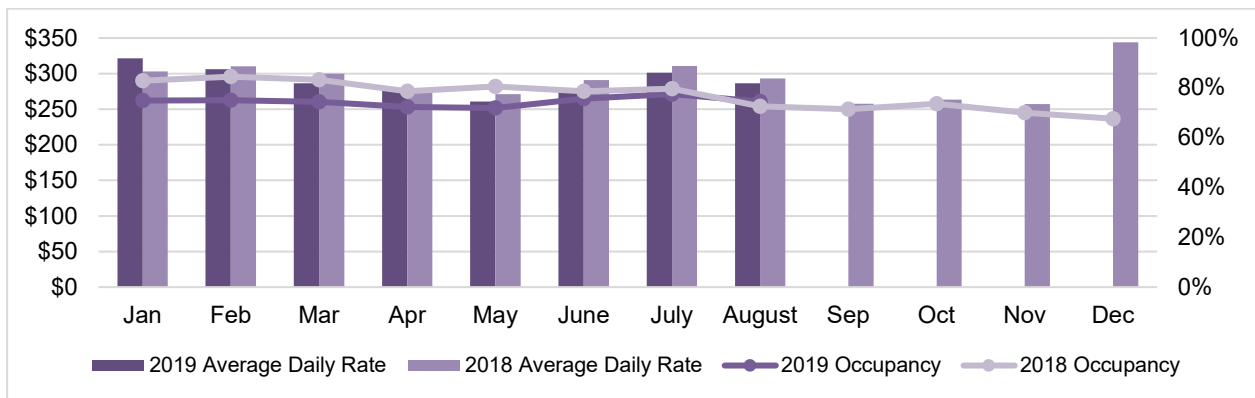
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2019 vs. 2018



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



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