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HTA Release (18-86)

Hawai'i Tourism Authority Releases Hawai'i Hotel Performance Report for November 2018

HONOLULU – Hawai'i hotels statewide reported no growth in revenue per available room (RevPAR), modest growth in average daily rate (ADR) and a decrease in occupancy in November 2018.

According to the *Hawai'i Hotel Performance Report* released today by the Hawai'i Tourism Authority (HTA), RevPAR was flat at \$190 (-0.2%), ADR rose to \$251 (+3.4%), and occupancy declined to 75.8 percent (-2.7 percentage points) in November compared to a year ago (Figure 1).

Year-to-date through the first 11 months of 2018, hotel properties statewide averaged RevPAR of \$219 (+5.1%), ADR of \$273 (+5.4%) and occupancy of 80.1 percent (-0.2 percentage points) versus the same period from 2017 (Figure 2).

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.

Most price classes reported RevPAR growth statewide in November, with increases in ADR offsetting lower occupancies. Luxury Class hotels earned RevPAR of \$358 (+2.9%), with ADR of \$491 (+5.1%) and occupancy of 72.9 percent (-1.6 percentage points). Upscale Class hotels was the only price class to avoid a year-over-year decline in any of the three categories in November, reporting RevPAR of \$139 (+5.5%), ADR of \$191 (+5.4%) and occupancy of 72.5 percent (+0.1 percentage points).

Among the four counties, hotel properties on Kaua'i led the state in growth of RevPAR of 8.3 percent to \$180 in November, as a 10.9 percent increase in ADR to \$257 offset a decrease in occupancy of 70.0 percent (-1.6 percentage points).

Maui County hotel properties led the state in overall RevPAR of \$247 in November (+4.3%), with an increase in ADR to \$335 (+6.4%) offsetting lower occupancy of 73.6 percent (-1.5 percentage points).

The resort regions of Wailea and Lahaina-Kā'anapali-Kapalua on the island of Maui both reported RevPAR increases in November. Wailea hotels led the state's resort regions in November reporting increases in RevPAR to \$431 (+5.2%), ADR to \$499 (+2.1%), and occupancy of 86.4% (+2.6 percentage points). Hotels in the Lahaina-Kā'anapali-Kapalua resort region reported an increase in RevPAR to \$200 (+3.5%), which was driven by growth in ADR to \$282 (+9.5%) to offset a decline in occupancy of 70.9 percent (-4.1 percentage points).

O'ahu hotel properties reported decreases in all three categories in November, as RevPAR dropped to \$174 (-3.2%) due to flat ADR of \$219 (-0.2%) combined with lower occupancy of 79.4 percent (-2.5% percentage points). Hotels in Waikīkī reported similar results, with RevPAR of \$171 (-4.4%), ADR of \$215 (-0.2%) and occupancy of 79.6 percent (-3.5 percentage points).

Hotel properties on the island of Hawai'i reported a decline in RevPAR to \$160 (-5.0%) in November, as growth in ADR to \$238 (+4.4%) was offset by decreased occupancy of 67.2% percent (-6.6 percentage points). Notably, the Kohala Coast resort region, which had reported drops in RevPAR in each month from June through October, saw RevPAR increase slightly to \$233 (+0.6%) in November, as higher ADR of \$341 (+2.5%) balanced a decrease in occupancy to 68.3 percent (-1.2 percentage points).

Tables of hotel performance statistics, including data presented in the news release are available for viewing online at: <https://www.hawaiiitourismauthority.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 November 2018, the survey included 166 properties representing 48,028 rooms, or 90.3 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels.

About the Hawai'i Tourism Authority

The [Hawai'i Tourism Authority](http://www.hawaiiitourismauthority.org) is responsible for strategically managing the State of Hawai'i's marketing initiatives to support tourism. HTA's goal is to optimize tourism's benefits for Hawai'i, while being attentive to the interests of travelers, the community and visitor industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure the sustainability of tourism's success.

For more information about HTA, please visit www.hawaiiitourismauthority.org. Follow updates about HTA on [Facebook](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

For more information, contact:

Charlene Chan
Director of Communications
Hawai'i Tourism Authority
(808) 973-2272
Charlene@gohta.net

Patrick Dugan
Anthology Marketing Group
(808) 539-3411/(808) 741-2712
Patrick.Dugan@AnthologyGroup.com

Jennifer Chun
Director of Tourism Research
Hawai'i Tourism Authority
(808) 973-9446
Jennifer@gohta.net

Erin Khan
Anthology Marketing Group
(808) 539-3428/(808) 349-3746
erin.khan@anthologygroup.com

Figure 1: Hawai'i Hotel Performance November 2018

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
State of Hawai'i	75.8%	78.4%	-2.7%	\$250.98	\$242.75	3.4%	\$190.13	\$190.43	-0.2%
Luxury Class	72.9%	74.5%	-1.6%	\$490.68	\$466.73	5.1%	\$357.66	\$347.53	2.9%
Upper Upscale Class	78.6%	83.8%	-5.2%	\$249.28	\$244.67	1.9%	\$195.96	\$204.98	-4.4%
Upscale Class	72.5%	72.5%	0.1%	\$191.34	\$181.52	5.4%	\$138.73	\$131.51	5.5%
Upper Midscale Class	76.5%	78.0%	-1.5%	\$150.24	\$146.09	2.8%	\$114.99	\$114.02	0.9%
Midscale & Economy Class	75.1%	79.2%	-4.1%	\$151.00	\$139.30	8.4%	\$113.36	\$110.30	2.8%
O'ahu	79.4%	82.0%	-2.5%	\$218.91	\$219.24	-0.2%	\$173.87	\$179.69	-3.2%
Waikiki	79.6%	83.0%	-3.5%	\$215.15	\$215.54	-0.2%	\$171.19	\$178.98	-4.4%
Other O'ahu	78.6%	75.6%	3.1%	\$241.10	\$243.42	-1.0%	\$189.52	\$183.91	3.1%
O'ahu Luxury	69.3%	72.8%	-3.6%	\$446.40	\$436.03	2.4%	\$309.31	\$317.63	-2.6%
O'ahu Upper Upscale	82.3%	88.3%	-6.0%	\$235.46	\$241.41	-2.5%	\$193.81	\$213.14	-9.1%
O'ahu Upscale	78.9%	74.0%	4.9%	\$196.85	\$189.64	3.8%	\$155.31	\$140.34	10.7%
O'ahu Upper Midscale	78.2%	79.7%	-1.5%	\$140.34	\$138.27	1.5%	\$109.70	\$110.14	-0.4%
O'ahu Midscale & Economy	80.2%	85.7%	-5.5%	\$122.50	\$115.33	6.2%	\$98.26	\$98.86	-0.6%
Maui County	73.6%	75.1%	-1.5%	\$334.80	\$314.75	6.4%	\$246.46	\$236.38	4.3%
Wailea	86.4%	83.8%	2.6%	\$498.73	\$488.53	2.1%	\$430.95	\$409.49	5.2%
Lahaina/Kā'anapali/Kapalua	70.9%	75.0%	-4.1%	\$282.43	\$257.85	9.5%	\$200.11	\$193.34	3.5%
Other Maui County	77.1%	75.3%	1.9%	\$396.27	\$386.42	2.5%	\$305.67	\$290.80	5.1%
Maui County Luxury	76.3%	74.3%	2.0%	\$552.29	\$529.66	4.3%	\$421.15	\$393.38	7.1%
Maui County Upper Upscale & Upscale	72.8%	76.3%	-3.4%	\$261.16	\$245.54	6.4%	\$190.17	\$187.23	1.6%
Island of Hawai'i	67.2%	73.8%	-6.6%	\$238.36	\$228.32	4.4%	\$160.15	\$168.56	-5.0%
Kohala Coast	68.3%	69.6%	-1.2%	\$340.71	\$332.56	2.5%	\$232.86	\$231.43	0.6%
Kaua'i	70.0%	71.6%	-1.6%	\$257.31	\$232.06	10.9%	\$180.11	\$166.24	8.3%

Source: STR, Inc. © Copyright 2018 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.

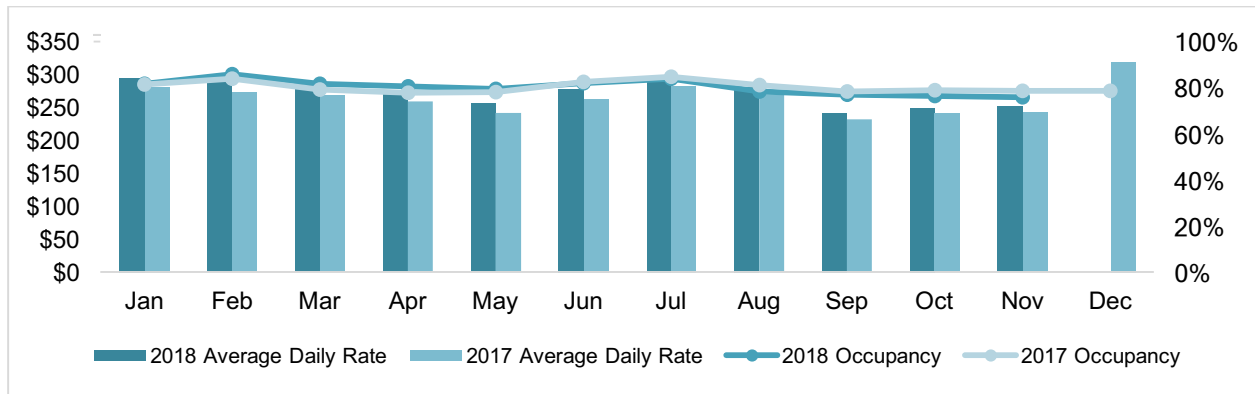
Figure 2: Hawai'i Hotel Performance Year-to-Date November 2018

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
State of Hawai'i	80.1%	80.3%	-0.2%	\$273.43	\$259.50	5.4%	\$219.04	\$208.43	5.1%
Luxury Class	75.1%	75.3%	-0.2%	\$539.47	\$506.51	6.5%	\$405.03	\$381.21	6.2%
Upper Upscale Class	84.4%	86.0%	-1.6%	\$270.59	\$260.05	4.0%	\$228.46	\$223.72	2.1%
Upscale Class	75.6%	74.2%	1.4%	\$208.27	\$193.61	7.6%	\$157.47	\$143.65	9.6%
Upper Midscale Class	81.4%	80.8%	0.7%	\$164.54	\$156.49	5.1%	\$134.00	\$126.42	6.0%
Midscale & Economy Class	79.9%	80.1%	-0.2%	\$162.32	\$148.94	9.0%	\$129.77	\$119.35	8.7%
O'ahu	84.0%	83.6%	0.4%	\$235.31	\$230.46	2.1%	\$197.69	\$192.77	2.6%
Waikiki	84.5%	84.5%	0.0%	\$231.22	\$226.29	2.2%	\$195.33	\$191.19	2.2%
Other O'ahu	81.3%	78.5%	2.8%	\$260.42	\$257.86	1.0%	\$211.63	\$202.42	4.5%
O'ahu Luxury	71.2%	72.0%	-0.8%	\$484.71	\$473.86	2.3%	\$345.31	\$341.17	1.2%
O'ahu Upper Upscale	88.4%	89.3%	-0.8%	\$253.61	\$252.79	0.3%	\$224.25	\$225.66	-0.6%
O'ahu Upscale	80.3%	77.1%	3.2%	\$208.79	\$196.02	6.5%	\$167.65	\$151.18	10.9%
O'ahu Upper Midscale	83.3%	82.7%	0.6%	\$154.08	\$148.86	3.5%	\$128.42	\$123.14	4.3%
O'ahu Midscale & Economy	87.0%	87.3%	-0.3%	\$133.12	\$126.21	5.5%	\$115.75	\$110.16	5.1%
Maui County	76.4%	77.2%	-0.8%	\$375.52	\$342.35	9.7%	\$286.99	\$264.29	8.6%
Wailea	87.6%	84.9%	2.7%	\$567.67	\$517.26	9.7%	\$497.21	\$439.15	13.2%
Lahaina/Kā'anapali/Kapalua	75.6%	77.6%	-2.0%	\$315.75	\$289.55	9.0%	\$238.77	\$224.71	6.3%
Other Maui County	77.4%	76.7%	0.8%	\$449.62	\$409.22	9.9%	\$348.19	\$313.82	11.0%
Maui County Luxury	78.3%	76.0%	2.3%	\$619.35	\$572.61	8.2%	\$484.82	\$434.90	11.5%
Maui County Upper Upscale & Upscale	76.7%	78.6%	-1.9%	\$295.04	\$270.53	9.1%	\$226.23	\$212.69	6.4%
Island of Hawai'i	72.6%	74.7%	-2.1%	\$257.01	\$243.68	5.5%	\$186.53	\$182.09	2.4%
Kohala Coast	69.8%	73.4%	-3.7%	\$362.56	\$338.44	7.1%	\$252.89	\$248.51	1.8%
Kaua'i	76.1%	75.9%	0.2%	\$287.02	\$259.44	10.6%	\$218.49	\$196.92	11.0%

Source: STR, Inc. © Copyright 2018 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.

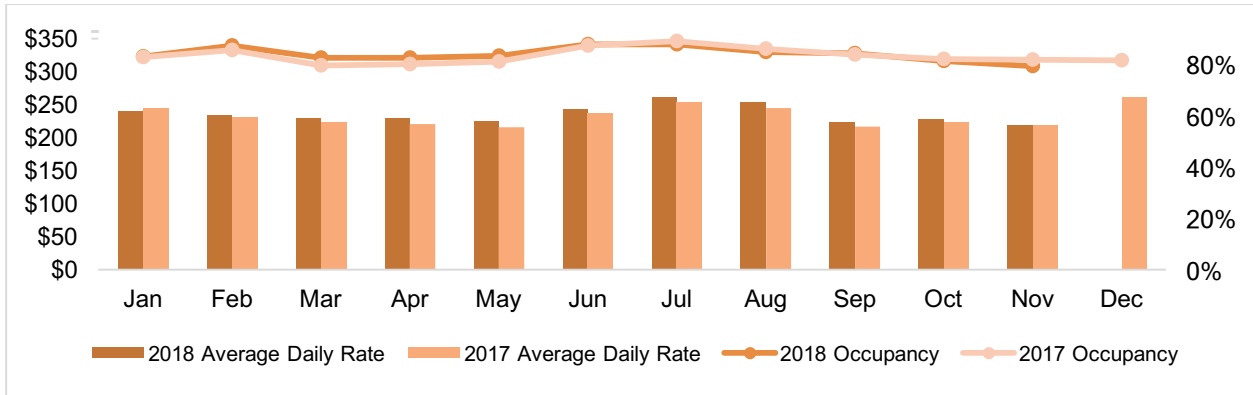
Figure 3: Monthly State of Hawai'i Hotel Performance, 2018 vs. 2017



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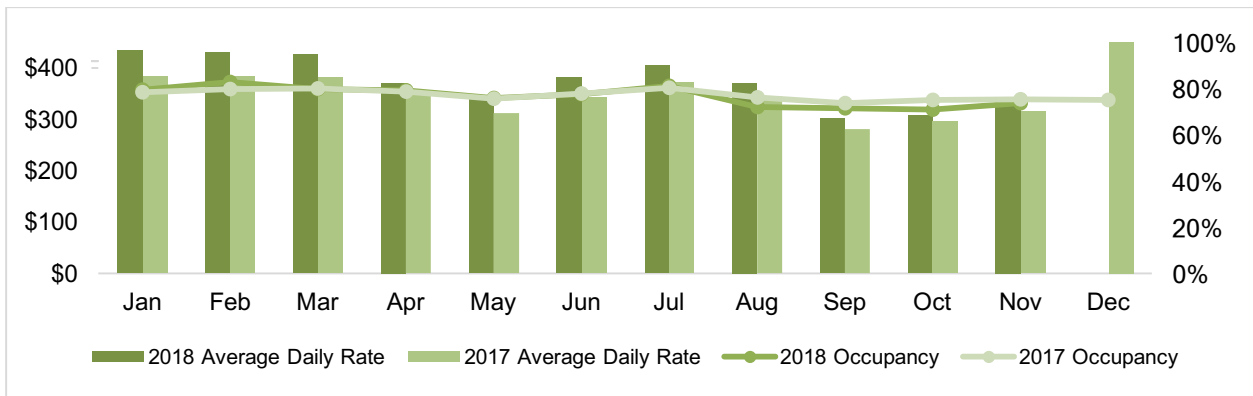
January and February 2017 data courtesy of Hospitality Advisors LLC.

Figure 4: Monthly O'ahu Hotel Performance, 2018 vs. 2017



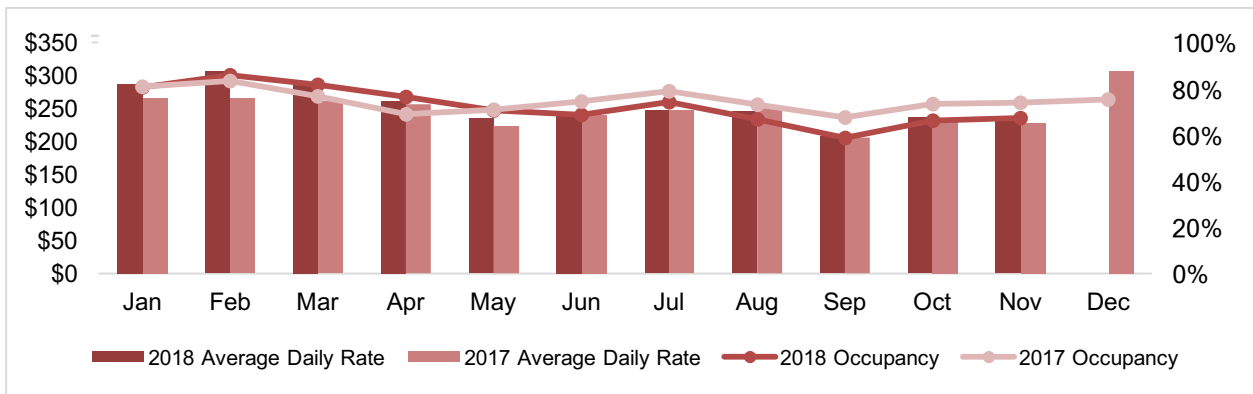
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 January and February 2017 data courtesy of Hospitality Advisors LLC.

Figure 5: Monthly Maui County Hotel Performance, 2018 vs. 2017



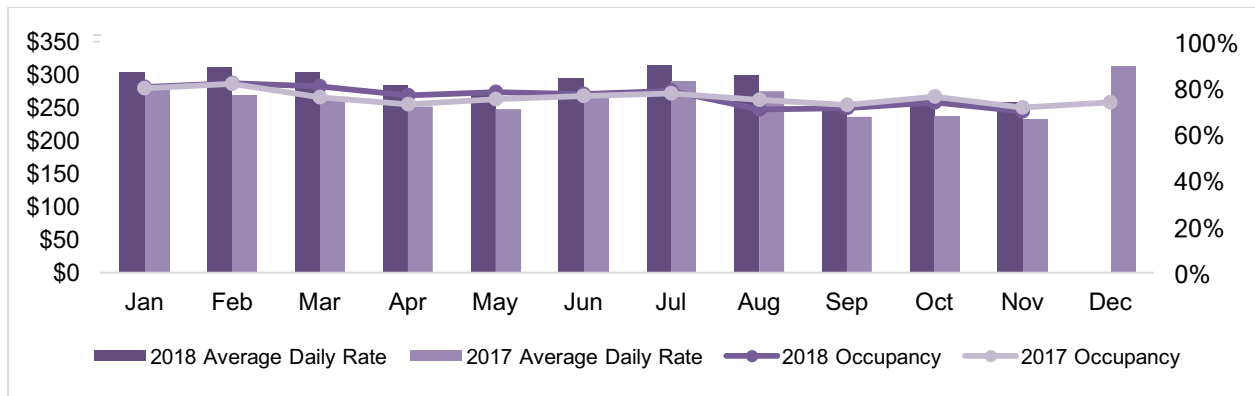
Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority.
 January and February 2017 data courtesy of Hospitality Advisors LLC.

Figure 6: Monthly Island of Hawai'i Hotel Performance, 2018 vs. 2017



Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority.
 January and February 2017 data courtesy of Hospitality Advisors LLC.

Figure 7: Monthly Kaua'i Hotel Performance, 2018 vs. 2017



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