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HTA Release (18-75)

## **Hawai'i Hotel Properties Led Nation in Revenue Per Available Room (\$225) and Average Daily Rate (\$278) in First Three Quarters of 2018**

### **Hawai'i's Four Major Islands Competitive with International Sun and Sea Destinations**

**HONOLULU** – Through the first three quarters of 2018, Hawai'i hotels statewide reported modest increases in revenue per available room (RevPAR) and average daily rate (ADR) with flat occupancy, all of which kept the Hawaiian Islands competitive with other domestic and international markets.

According to the *Hawai'i Hotel Performance Report* issued today by the Hawai'i Tourism Authority (HTA), RevPAR in the Hawaiian Islands increased to \$225 (+6.1%), ADR grew to \$278 (+5.7%), with occupancy staying flat at 81.0 percent (+0.3 percentage points) in the first three quarters compared to last year (Figure 1).

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.

Jennifer Chun, HTA tourism research director, noted, "The increases in RevPAR and ADR through nine months are due to the strong performance that Hawai'i hotels realized in the first half of the year."

All classes of Hawai'i's hotel properties reported RevPAR growth in the first three quarters of 2018. Year-to-date through September, Luxury Class hotels statewide earned growth in both RevPAR to \$418 (+6.6%) and ADR to \$553 (+6.6%), while occupancy remained flat at 75.6 percent. At the other end of the price spectrum, Midscale & Economy Class properties statewide saw RevPAR increase to \$135 (+11.3%) and ADR grow to \$166 (+9.8%), with occupancy at 81.3% (+1.1 percentage points).

Compared to other top U.S. markets, the Hawaiian Islands ranked first in RevPAR at \$225 (+6.1%) through three quarters, a period in which U.S. hotels nationwide reported RevPAR growth. New York City ranked second at \$215 (+3.5%) with San Francisco/San Mateo third at \$204 (+5.1%) (Figure 2).

The Hawaiian Islands also led the U.S. markets in ADR at \$278 (+5.7%), again followed by New York City at \$248 (+2.5%) and San Francisco/San Mateo at \$243 (+6.1%) (Figure 3).

The Hawaiian Islands ranked third for occupancy at 81.0 percent (+0.3 percentage points), with New York City holding the top spot at 86.7% (+0.9 percentage points) and San Francisco/San Mateo ranking second at 83.7% (-0.8 percentage points) (Figure 4).

### **All Four Counties Reported RevPAR and ADR Increases through Three Quarters**

All four island counties reported RevPAR and ADR increases through the first three quarters of 2018. Maui County hotels led the state in overall RevPAR of \$299 (+9.9%) through three quarters, driven by an increase in ADR to \$387 (+10.3%), which offset flat occupancy of 77.4% (-0.3 percentage points).

Kaua'i hotels led the state in growth of RevPAR to \$227 (+12.3%) through three quarters, boosted by increases in ADR to \$294 (+11.1%) and occupancy to 77.1 percent (+0.8 percentage points).

O'ahu hotels saw RevPAR increase to \$202 (+3.2%) through three quarters, with growth realized in both ADR to \$238 (+2.2%) and occupancy to 84.8% (+0.8 percentage points).

Hotels on the island of Hawai'i recorded growth in RevPAR to \$193 (+4.1%) through three quarters, driven by an increase in ADR to \$261 (+5.6%), which offset a decrease in occupancy of 73.9 percent (-1.1 percentage points).

Among Hawai'i's resort regions, Wailea on Maui led the state through three quarters in both total RevPAR and growth of RevPAR at \$516 (+14.0%), ADR at \$587 (+11.2%) and occupancy of 87.9% (+2.2 percentage points).

Also, on Maui, hotels in the Lahaina/Kā'anapali/Kapalua resort area reported growth in RevPAR to \$249 (+7.5%) through three quarters, with the increase in ADR to \$324 (+9.0%) offsetting a decrease in occupancy of 76.9% (-1.1 percentage points).

Waikīkī hotels earned growth in RevPAR to \$199 (+3.0%) through three quarters, bolstered by modest increases in both ADR to \$233 (+2.3%) and occupancy to 85.3% (+0.6 percentage points).

The Kohala Coast region reported an increase in RevPAR to \$260 (+2.5%) through three quarters with the growth in ADR to \$369 (+7.9%) offsetting a decline in occupancy to 70.6% (-3.7 percentage points).

### **Four Island Counties Compared Favorably to International Sun and Sea Destinations**

The performance of hotels on Hawai'i's four island counties was competitive when compared to top international sun and sea destinations over the first three quarters of 2018.

Hotels in the Maldives ranked highest in RevPAR at \$388 (+1.7%) followed by French Polynesia at \$365 (+6.2%). Maui County ranked third at \$299 (+9.9%), with Aruba fourth at \$240 (+13.0%), Kaua'i fifth at \$227 (+12.3%), O'ahu sixth at \$202 (+3.2%) and the island of Hawai'i seventh at \$193 (+4.1%) (Figure 5).

Hotels in the Maldives also led in ADR at \$608 (+0.7%) through three quarters, followed by French Polynesia at \$554 (+12.5%) and Cabo San Lucas at \$389 (+18.0%). Maui County ranked fourth at \$387 (+10.3%) with Aruba fifth at \$319 (+12.1%). Kaua'i at \$294 (+11.1%), the island of Hawai'i at \$261 (+5.6%) and O'ahu at \$238 (+2.2%) ranked sixth, seventh and eighth, respectively (Figure 6).

O'ahu led all sun and sea destinations in hotel occupancy at 84.8 percent (+0.8 percentage points) through three quarters. Maui County ranked second at 77.4 percent (-0.3 percentage points), with Kaua'i third at 77.1 percent (+0.8 percentage points), Aruba fourth at 75.4 percent (+0.6 percentage points), Phuket fifth at 74.5 percent (-1.9 percentage points) and the island of Hawai'i sixth at 73.9 percent (-1.1 percentage points) (Figure 7).

### **RevPAR and ADR Grew Statewide and for Maui County, Kaua'i and O'ahu in September**

For the month of September, Hawai'i hotels statewide reported growth in RevPAR to \$186 (+2.6%), with the increase in ADR to \$242 (+4.5%) offsetting a decline in occupancy of 76.9% (-1.4 percentage points) (Figure 8).

Nearly all classes of hotel properties reported higher RevPAR and ADR in September compared to a year ago. However, only Upscale Class properties reported an increase in occupancy at 73.3 percent (+1.3 percentage points). Luxury Class hotels statewide reported flat RevPAR of \$299 (+0.3%) while Midscale & Economy Class hotels earned an increase in RevPAR to \$119 (+6.4%).

Chun commented, "September's results were not as bad as anticipated, especially considering the anxiety that Hurricane Lane and Tropical Storm Olivia created for the tourism industry between the latter part of August through mid-September."

Despite the heavy rains and high winds caused by the two storms striking parts of the Hawaiian Islands, Maui County, Kaua'i and O'ahu all realized increases in RevPAR and ADR during September. Travel bookings to the island of Hawai'i continued to wane, largely due to the lingering effect of Kīlauea volcano's eruptive activity from May 3 through August 6.

Maui County hotels reported the highest total RevPAR at \$216 (+4.8%) of all island counties in September, with growth of ADR to \$302 (+7.8%) offsetting decreased occupancy of 71.4 percent (-2.1 percentage points).

Kaua'i hotels earned the highest growth in RevPAR at 7.2 percent (\$184) of all island counties in September, which was supported by increased ADR of \$257 (+9.0%) offsetting lowered occupancy of 71.4 percent (-1.2 percentage points).

O'ahu hotels grew RevPAR to \$188 (+3.1%) and ADR to \$223 (+2.7%) in September, with occupancy of 84.2 percent (+0.4 percentage points) being similar to a year ago.

Hotels on the island of Hawai'i reported a decline in RevPAR to \$122 (-12.5%) in September compared to the year prior. Slightly higher ADR of \$208 (+0.9%) for the month was offset by a drop in occupancy to 58.7% (-8.9 percentage points).

Wailea hotels led the state's resort regions in growth of both RevPAR to \$364 (+11.2%) and occupancy to 84.8 percent (+5.9 percentage points) in September. In addition, ADR increased to \$429 (+3.4%).

The Lahaina/Kā'anapali/Kapalua region also grew RevPAR to \$187 (+2.2%) in September, with rising ADR of \$263 (+8.1%) offsetting declining occupancy of 71.0 percent (-4.1 percentage points).

Waikīkī hotels earned RevPAR of \$188 (+2.2%) supported by an increase in ADR to \$222 (+2.9%). Occupancy declined slightly to 84.9 percent (-0.6 percentage points).

Hotels in the Kohala Coast region reported a RevPAR loss of 17.6 percent to \$143, with declines in both ADR to \$279 (-1.1%) and occupancy of 51.3 percent (-10.3 percentage points).

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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 September 2018, the survey included 165 properties representing 48,267 rooms, or 89.9 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](https://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.hawaiitourismauthority.org](http://www.hawaiitourismauthority.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](mailto:Charlene@gohta.net)

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

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

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

**Figure 1: Hawai'i Hotel Performance Year-to-Date September 2018**

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
<b>State of Hawai'i</b>	81.0%	80.7%	0.3%	\$278.31	\$263.40	5.7%	\$225.47	\$212.55	6.1%
Luxury Class	75.6%	75.6%	0.0%	\$552.58	\$518.31	6.6%	\$417.77	\$391.76	6.6%
Upper Upscale Class	85.6%	86.4%	-0.8%	\$274.48	\$262.97	4.4%	\$234.92	\$227.10	3.4%
Upscale Class	76.3%	74.7%	1.6%	\$211.35	\$196.00	7.8%	\$161.16	\$146.37	10.1%
Upper Midscale Class	82.4%	81.3%	1.1%	\$167.08	\$158.61	5.3%	\$137.66	\$128.97	6.7%
Midscale & Economy Class	81.3%	80.2%	1.1%	\$165.62	\$150.78	9.8%	\$134.65	\$120.93	11.3%
<b>O'ahu</b>	84.8%	84.0%	0.8%	\$237.80	\$232.58	2.2%	\$201.65	\$195.37	3.2%
Waikiki	85.3%	84.8%	0.6%	\$233.47	\$228.21	2.3%	\$199.18	\$193.42	3.0%
Other O'ahu	81.8%	79.4%	2.4%	\$264.60	\$261.21	1.3%	\$216.31	\$207.30	4.3%
O'ahu Luxury	71.5%	71.8%	-0.3%	\$493.24	\$481.32	2.5%	\$352.58	\$345.69	2.0%
O'ahu Upper Upscale	89.5%	89.4%	0.1%	\$256.27	\$254.83	0.6%	\$229.25	\$227.71	0.7%
O'ahu Upscale	80.5%	78.0%	2.5%	\$210.41	\$197.47	6.6%	\$169.42	\$154.08	10.0%
O'ahu Upper Midscale	84.3%	83.4%	0.9%	\$156.03	\$151.02	3.3%	\$131.49	\$125.95	4.4%
O'ahu Midscale & Economy	88.4%	87.5%	0.9%	\$134.52	\$128.48	4.7%	\$118.94	\$112.42	5.8%
<b>Maui County</b>	77.4%	77.7%	-0.3%	\$386.63	\$350.46	10.3%	\$299.14	\$272.31	9.9%
Wailea	87.9%	85.8%	2.2%	\$586.82	\$527.50	11.2%	\$516.00	\$452.49	14.0%
Lahaina/Kā'anapali/Kapalua	76.9%	78.0%	-1.1%	\$324.04	\$297.19	9.0%	\$249.18	\$231.77	7.5%
Other Maui County	78.0%	77.3%	0.6%	\$464.87	\$417.53	11.3%	\$362.48	\$322.92	12.3%
Maui County Luxury	78.8%	76.9%	2.0%	\$640.67	\$587.02	9.1%	\$505.02	\$451.22	11.9%
Maui County Upper Upscale & Upscale	77.8%	79.0%	-1.2%	\$302.71	\$276.23	9.6%	\$235.41	\$218.25	7.9%
<b>Island of Hawai'i</b>	73.9%	75.0%	-1.1%	\$260.67	\$246.92	5.6%	\$192.59	\$185.08	4.1%
Kohala Coast	70.6%	74.2%	-3.7%	\$369.04	\$342.12	7.9%	\$260.40	\$253.94	2.5%
<b>Kaua'i</b>	77.1%	76.3%	0.8%	\$294.31	\$264.90	11.1%	\$226.99	\$202.21	12.3%

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: Top 5 U.S. Markets – Revenue Per Available Room – YTD September 2018**

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$225.47	6.1%
2	New York, NY	\$215.27	3.5%
3	San Francisco/San Mateo, CA	\$203.61	5.1%
4	Miami/Hialeah, FL	\$154.57	9.4%
5	Boston, MA	\$150.16	1.3%

**Figure 3: Top 5 U.S. Markets – Average Daily Rate – YTD September 2018**

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$278.31	5.7%
2	New York, NY	\$248.17	2.5%
3	San Francisco/San Mateo, CA	\$243.34	6.1%
4	Miami/Hialeah, FL	\$198.60	7.4%
5	Boston, MA	\$197.48	0.3%

**Figure 4: Top 5 U.S. Markets – Occupancy – YTD September 2018**

Rank	Destination	Occupancy	Percentage Pt. Change
1	New York, NY	86.7%	0.9%
2	San Francisco/San Mateo, CA	83.7%	-0.8%
3	Hawaiian Islands	81.0%	0.3%
4	Los Angeles/Long Beach, CA	80.9%	-0.7%
5	San Diego, CA	80.8%	1.1%

**Figure 5: Competitive Sun and Sea Destinations – Revenue per Available Room – YTD September 2018**

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$387.69	1.7%
2	French Polynesia	\$365.85	6.2%
3	Maui	\$299.14	9.9%
4	Aruba	\$240.23	13.0%
5	Kaua'i	\$226.99	12.3%
6	O'ahu	\$201.65	3.2%
7	Island of Hawai'i	\$192.59	4.1%
8	Cabo San Lucas+	\$185.11	-4.5%
9	Cancun+	\$157.17	-4.0%
10	Puerto Rico	\$148.29	16.8%
11	Costa Rica	\$115.03	8.1%
12	Fiji	\$114.04	5.1%
13	Phuket	\$93.76	12.3%
14	Bali	\$75.69	-1.9%
15	Puerto Vallarta+	\$64.42	-17.4%

**Figure 6: Competitive Sun and Sea Destinations – Average Daily Rate – YTD September 2018**

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$608.04	0.7%
2	French Polynesia	\$553.80	12.5%
3	Cabo San Lucas+	\$388.79	18.0%
4	Maui	\$386.63	10.3%
5	Aruba	\$318.67	12.1%
6	Kaua'i	\$294.31	11.1%
7	Island of Hawai'i	\$260.67	5.6%
8	O'ahu	\$237.80	2.2%
9	Cancun+	\$215.57	-0.8%
10	Puerto Rico	\$203.07	12.9%
11	Costa Rica	\$163.64	7.8%
12	Fiji	\$154.77	2.0%
13	Phuket	\$125.87	15.1%
14	Bali	\$106.37	-0.1%
15	Puerto Vallarta+	\$103.27	-8.7%

**Figure 7: Competitive Sun and Sea Destinations – Occupancy – YTD September 2018**

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	84.8%	0.8%
2	Maui	77.4%	-0.3%
3	Kaua'i	77.1%	0.8%
4	Aruba	75.4%	0.6%
5	Phuket	74.5%	-1.9%
6	Island of Hawai'i	73.9%	-1.1%
7	Fiji	73.7%	2.2%
8	Puerto Rico	73.0%	2.5%
9	Cancun+	72.9%	-2.5%
10	Bali	71.2%	-1.3%
11	Costa Rica	70.3%	0.2%
12	French Polynesia	66.1%	-3.9%
13	Maldives	63.8%	0.6%
14	Puerto Vallarta+	62.4%	-6.5%
15	Cabo San Lucas+	47.6%	-11.2%

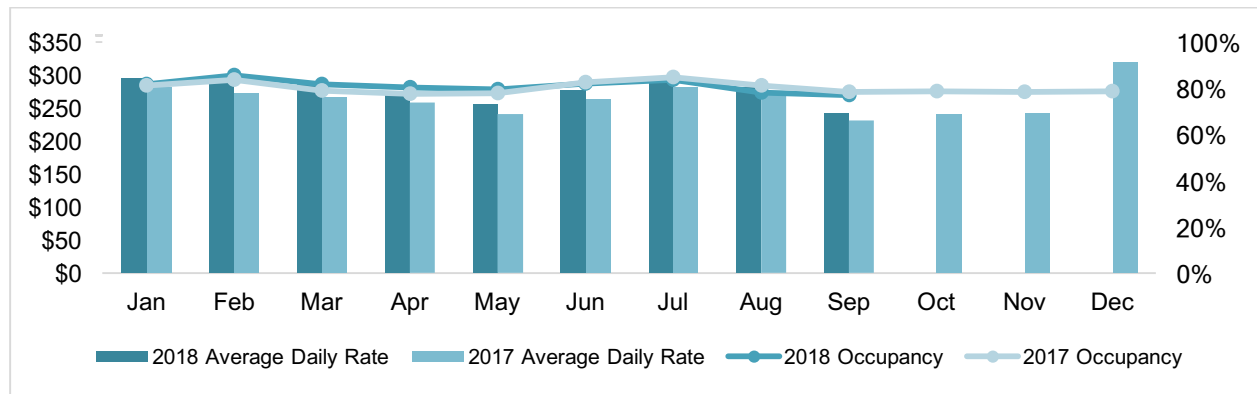
**Figure 8: Hawai'i Hotel Performance September 2018**

	Occupancy %			Average Daily Rate			RevPAR		
	2018	2017	Percentage Pt. Change	2018	2017	% Change	2018	2017	% Change
<b>State of Hawai'i</b>	76.9%	78.4%	-1.4%	\$241.72	\$231.30	4.5%	\$185.96	\$181.25	2.6%
Luxury Class	68.3%	70.0%	-1.7%	\$438.17	\$426.37	2.8%	\$299.46	\$298.50	0.3%
Upper Upscale Class	81.0%	84.3%	-3.2%	\$247.15	\$239.58	3.2%	\$200.27	\$201.87	-0.8%
Upscale Class	73.3%	71.9%	1.3%	\$192.30	\$175.60	9.5%	\$140.95	\$126.34	11.6%
Upper Midscale Class	81.4%	81.4%	-0.1%	\$155.11	\$146.97	5.5%	\$126.22	\$119.70	5.4%
Midscale & Economy Class	76.6%	79.9%	-3.3%	\$154.87	\$139.53	11.0%	\$118.65	\$111.47	6.4%
<b>O'ahu</b>	84.2%	83.9%	0.4%	\$223.20	\$217.36	2.7%	\$188.02	\$182.32	3.1%
Waikiki	84.9%	85.5%	-0.6%	\$221.60	\$215.33	2.9%	\$188.06	\$184.09	2.2%
Other O'ahu	80.6%	74.3%	6.3%	\$233.13	\$231.20	0.8%	\$187.81	\$171.79	9.3%
O'ahu Luxury	70.9%	73.2%	-2.3%	\$444.77	\$430.50	3.3%	\$315.29	\$315.06	0.1%
O'ahu Upper Upscale	88.3%	89.7%	-1.3%	\$241.91	\$240.41	0.6%	\$213.71	\$215.55	-0.9%
O'ahu Upscale	80.8%	75.3%	5.5%	\$199.80	\$183.69	8.8%	\$161.46	\$138.34	16.7%
O'ahu Upper Midscale	84.7%	83.8%	0.9%	\$147.52	\$141.82	4.0%	\$124.93	\$118.87	5.1%
O'ahu Midscale & Economy	85.5%	88.6%	-3.1%	\$129.09	\$120.27	7.3%	\$110.43	\$106.59	3.6%
<b>Maui County</b>	71.4%	73.5%	-2.1%	\$302.14	\$280.33	7.8%	\$215.70	\$205.91	4.8%
Wailea	84.8%	78.9%	5.9%	\$428.64	\$414.62	3.4%	\$363.50	\$326.95	11.2%
Lahaina/Kā'anapali/Kapalua	71.0%	75.1%	-4.1%	\$263.18	\$243.39	8.1%	\$186.83	\$182.74	2.2%
Other Maui County	71.9%	71.4%	0.5%	\$351.19	\$329.46	6.6%	\$252.52	\$235.20	7.4%
Maui County Luxury	72.9%	66.7%	6.3%	\$461.46	\$456.28	1.1%	\$336.57	\$304.27	10.6%
Maui County Upper Upscale & Upscale	72.1%	76.7%	-4.6%	\$247.37	\$230.85	7.2%	\$178.32	\$177.06	0.7%
<b>Island of Hawai'i</b>	58.7%	67.6%	-8.9%	\$207.77	\$205.99	0.9%	\$121.90	\$139.27	-12.5%
Kohala Coast	51.3%	61.6%	-10.3%	\$279.04	\$282.15	-1.1%	\$143.25	\$173.85	-17.6%
<b>Kaua'i</b>	71.4%	72.6%	-1.2%	\$257.38	\$236.12	9.0%	\$183.78	\$171.37	7.2%

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.

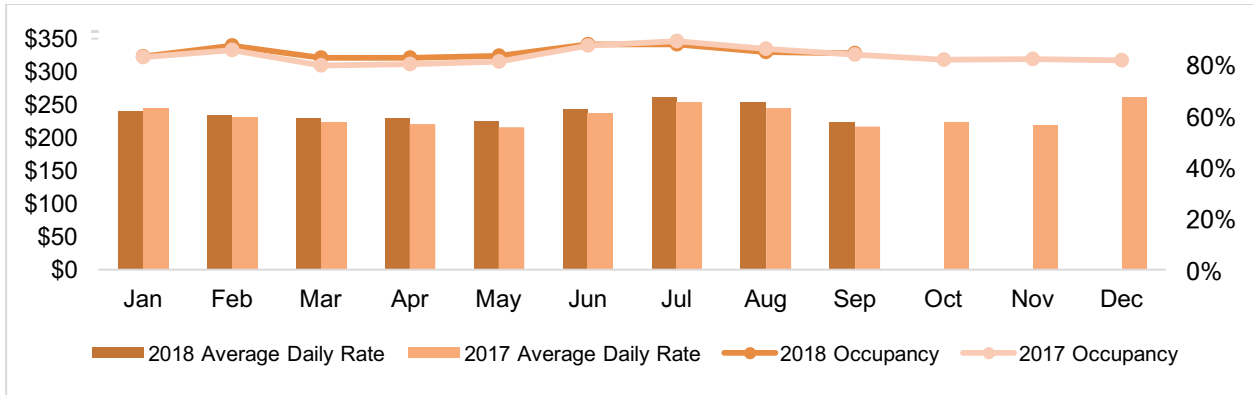
**Figure 9: Monthly State of Hawai'i Hotel Performance, 2018 vs. 2017**



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

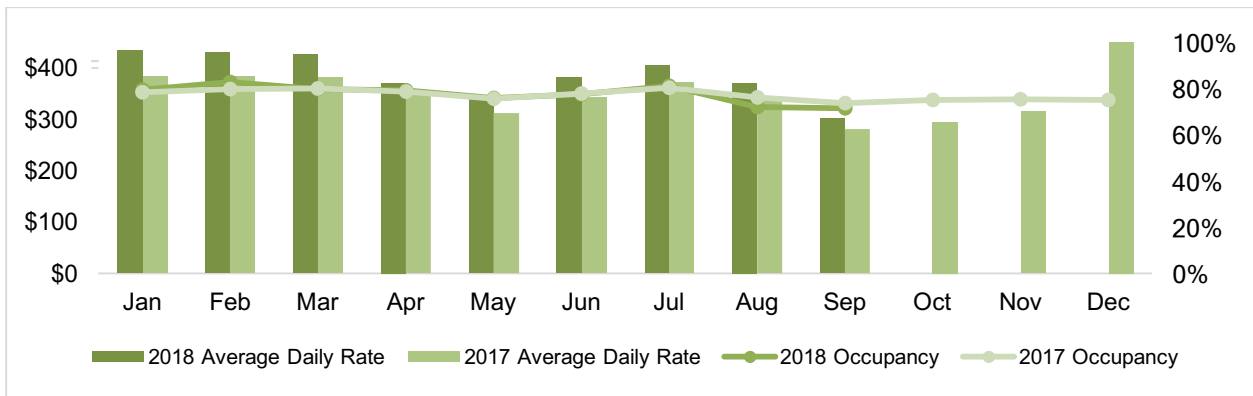


**Figure 10: Monthly O'ahu Hotel Performance, 2018 vs. 2017**



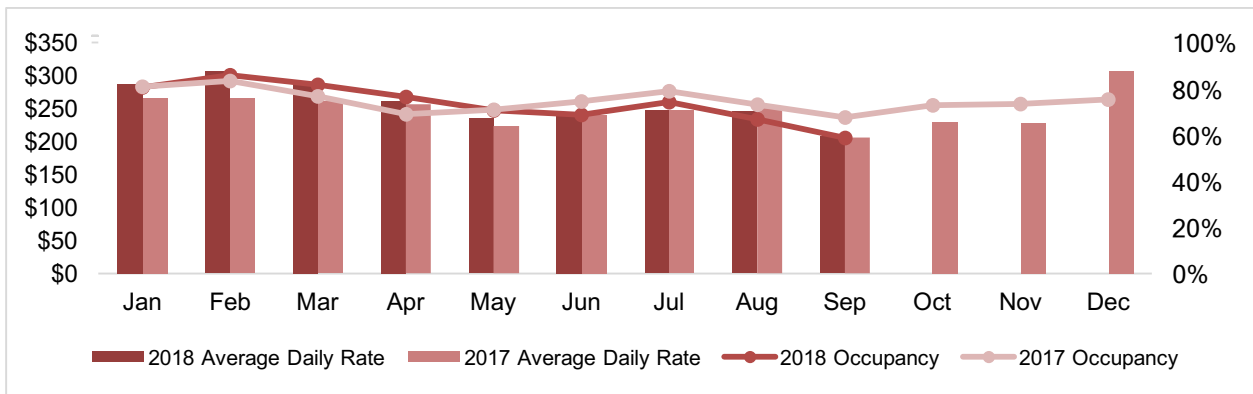
Source: STR, Inc. © Copyright 2018 Hawai'i Tourism Authority.  
January and February 2017 data courtesy of Hospitality Advisors LLC.

**Figure 11: Monthly Maui County Hotel Performance, 2018 vs. 2017**



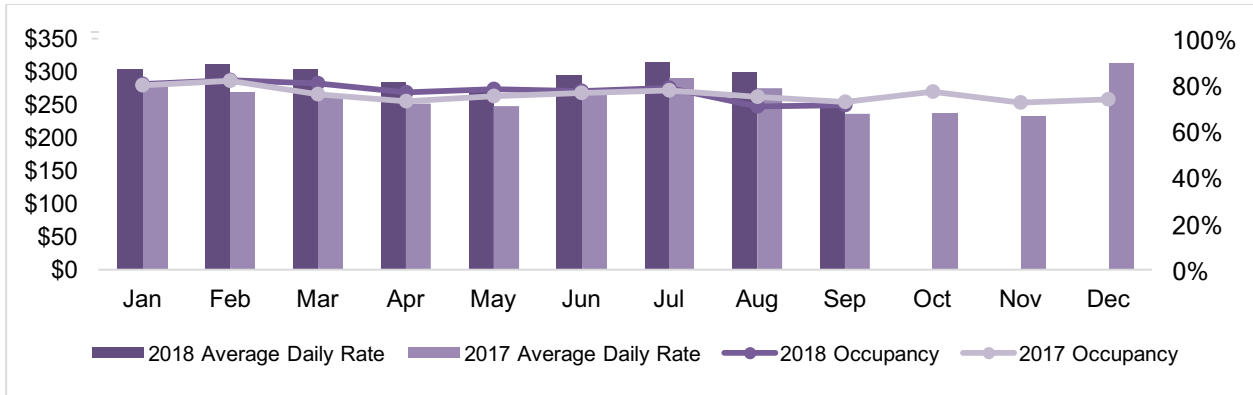
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January and February 2017 data courtesy of Hospitality Advisors LLC.

**Figure 12: 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 13: Monthly Kauai Hotel Performance, 2018 vs. 2017**



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