



## November 2019 Hawaii Vacation Rental Performance Report

In November 2019, the total monthly supply of statewide vacation rentals was 919,100 unit nights and monthly demand was 630,500 unit nights, resulting in an average monthly unit occupancy of 68.6 percent (Figure 1).

In comparison, Hawaii's hotels were 78.8 percent occupied in November 2019. It is important to note that unlike hotels, condominium hotels, and timeshare resorts, vacation rental units are not necessarily available year-round or each day of the month. The unit average daily rate (ADR) for vacation rental units statewide in November was \$181, lower than the ADR for hotels (\$260).

HTA's Tourism Research Division issued the report's findings utilizing data compiled by Transparent Intelligence, Inc. The data in this report specifically excludes units reported in HTA's *Hawaii Hotel Performance Report* and *Hawaii Timeshare Quarterly Survey Report*. In this report, a vacation rental is defined as the use of a rental house, private room in private home, or shared room/space in private home. This report also does not determine or differentiate between units that are permitted or unpermitted. The "legality" of any given vacation rental unit is determined on a county basis.

### Island Highlights

In November, Maui County had the largest vacation rental supply of all four counties at 304,000 unit nights, which is an increase of 32.9 percent compared to a year ago. Unit demand was 231,000 unit nights, resulting in 75.9 percent occupancy (-3.8 percentage points) with an ADR of \$220 (+2.9%). Maui County hotels were 74.9 percent occupied with an ADR of \$354.

On O'ahu, the vacation rental supply in November was 252,000 unit nights. This is a decrease of 4.4 percent from a year ago. Unit demand on O'ahu was 170,000 unit nights (-5.4%), resulting in a 67.5 percent occupancy (-0.8 percentage points) and an ADR of \$146 (+0.8%). O'ahu hotels were 82.0 percent occupied with an ADR of \$229.

There were 224,000 available unit nights (+18.9%) on the island of Hawaii. Unit demand was 135,000 unit nights (+18.4%), resulting in 60.2 percent occupancy (-0.2 percentage points) with an ADR of \$135 (-8.5%). Hawaii Island hotels were 75.7 percent occupied with an ADR of \$245.

Kauai had the fewest number of available unit nights at 139,000 (+32.8%). Unit demand was 94,000 unit nights (+16.7%), resulting in 68.1 percent occupancy (-9.4 percentage points) with an ADR of \$211 (-9.2%). Kauai hotels were 72.2 percent occupied with an ADR of \$250.

Tables of vacation rental 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 Vacation Rental Performance Report

The Hawai'i Vacation Rental Performance Report is produced using data compiled by Transparent Intelligence, Inc., which was selected by the Hawai'i Tourism Authority as the provider for these data services. The report includes data for properties that are listed on Airbnb, Booking.com, HomeAway, and TripAdvisor. Data for units included in HTA's Hawai'i Hotel Performance Report and Hawai'i Timeshare Quarterly Report have been excluded from the Hawai'i Vacation Rental Performance Report. This report also does not determine or differentiate between units that are permitted or unpermitted. The "legality" of any given vacation rental unit is determined on a county basis.

For November 2019, the report included data for 34,058 units, representing 59,635 bedrooms in the Hawaiian Islands.

**Figure 1: Hawai'i Vacation Rental Performance November 2019**

	Unit Supply			Unit Demand			Unit Occupancy %			Unit Average Daily Rate		
	2019	2018	% Change	2019	2018	% Change	2019	2018	Percentage Pt. Change	2019	2018	% Change
<b>State of Hawai'i</b>	919,132	785,561	17.0%	630,502	557,423	13.1%	68.6%	71.0%	-2.4%	\$180.52	\$180.69	-0.1%
<b>O'ahu</b>	252,415	263,955	-4.4%	170,326	180,142	-5.4%	67.5%	68.2%	-0.8%	\$146.00	\$144.81	0.8%
Waikīkī	126,534	105,731	19.7%	91,125	76,918	18.5%	72.0%	72.7%	-0.7%	\$115.70	\$133.99	-13.6%
<b>Maui County</b>	304,163	228,908	32.9%	230,845	182,473	26.5%	75.9%	79.7%	-3.8%	\$219.87	\$213.60	2.9%
Wailea/Kīhei	139,203	106,121	31.2%	111,554	86,412	29.1%	80.1%	81.4%	-1.3%	\$216.54	\$212.36	2.0%
Lahaina/Kā'anapali/ Nāpili/Kapalua	128,779	89,905	43.2%	93,558	72,029	29.9%	72.7%	80.1%	-7.5%	\$238.72	\$231.03	3.3%
<b>Island of Hawai'i</b>	223,930	188,339	18.9%	134,896	113,916	18.4%	60.2%	60.5%	-0.2%	\$135.30	\$147.93	-8.5%
Kona	106,215	87,014	22.1%	69,796	57,205	22.0%	65.7%	65.7%	0.0%	\$108.56	\$127.86	-15.1%
Hilo/Honoka'a	48,783	43,074	13.3%	24,878	23,121	7.6%	51.0%	53.7%	-2.7%	\$81.24	\$91.55	-11.3%
<b>Kaua'i</b>	138,624	104,359	32.8%	94,435	80,892	16.7%	68.1%	77.5%	-9.4%	\$211.16	\$232.47	-9.2%

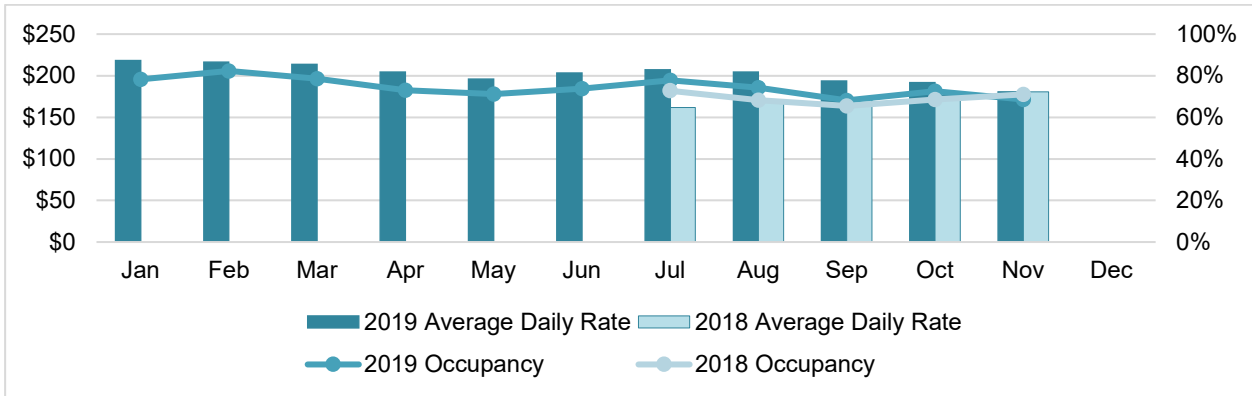
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**Figure 2: Hawai'i Vacation Rental Performance Year-to-Date November 2019**

	Unit Supply			Unit Demand			Unit Occupancy %			Unit Average Daily Rate		
	2019	2018	% Change	2019	2018	% Change	2019	2018	Percentage Pt. Change	2019	2018	% Change
<b>State of Hawai'i</b>	9,389,318	N.A.	N.A.	6,950,254	N.A.	N.A.	74.0%	N.A.	N.A.	\$202.25	N.A.	N.A.
<b>O'ahu</b>	2,993,714	N.A.	N.A.	2,236,932	N.A.	N.A.	74.7%	N.A.	N.A.	\$164.12	N.A.	N.A.
Waikīkī	1,294,262	N.A.	N.A.	1,013,653	N.A.	N.A.	78.3%	N.A.	N.A.	\$142.00	N.A.	N.A.
<b>Maui County</b>	2,956,087	N.A.	N.A.	2,326,078	N.A.	N.A.	78.7%	N.A.	N.A.	\$242.50	N.A.	N.A.
Wailea/Kīhei	1,394,990	N.A.	N.A.	1,116,010	N.A.	N.A.	80.0%	N.A.	N.A.	\$234.30	N.A.	N.A.
Lahaina/Kā'anapali/ Nāpili/Kapalua	1,194,009	N.A.	N.A.	933,297	N.A.	N.A.	78.2%	N.A.	N.A.	\$270.21	N.A.	N.A.
<b>Island of Hawai'i</b>	2,127,889	N.A.	N.A.	1,399,859	N.A.	N.A.	65.8%	N.A.	N.A.	\$157.84	N.A.	N.A.
Kona	1,027,253	N.A.	N.A.	725,172	N.A.	N.A.	70.6%	N.A.	N.A.	\$130.74	N.A.	N.A.
Hilo/Honoka'a	423,841	N.A.	N.A.	245,922	N.A.	N.A.	58.0%	N.A.	N.A.	\$91.66	N.A.	N.A.
<b>Kaua'i</b>	1,311,628	N.A.	N.A.	987,385	N.A.	N.A.	75.3%	N.A.	N.A.	\$256.76	N.A.	N.A.

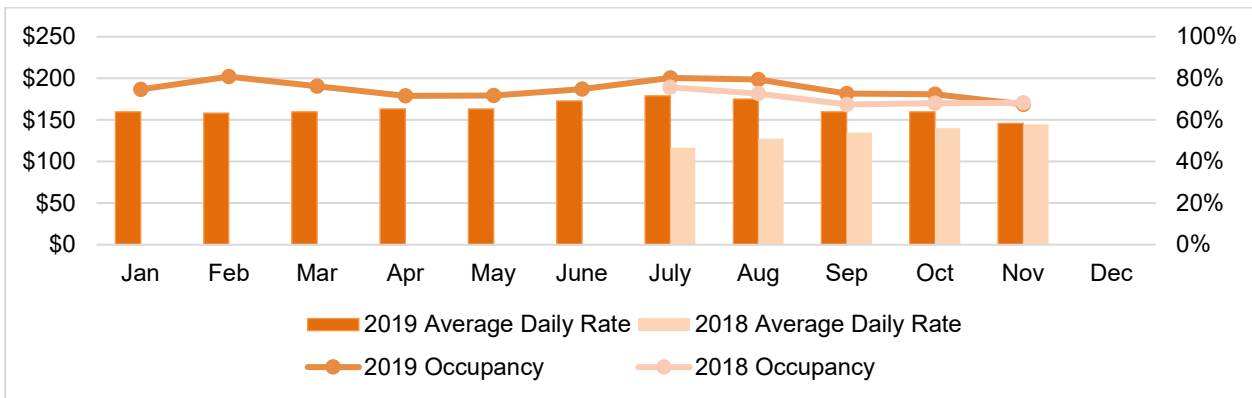
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**Figure 3: Monthly State of Hawai'i Vacation Rental Performance - 2019**



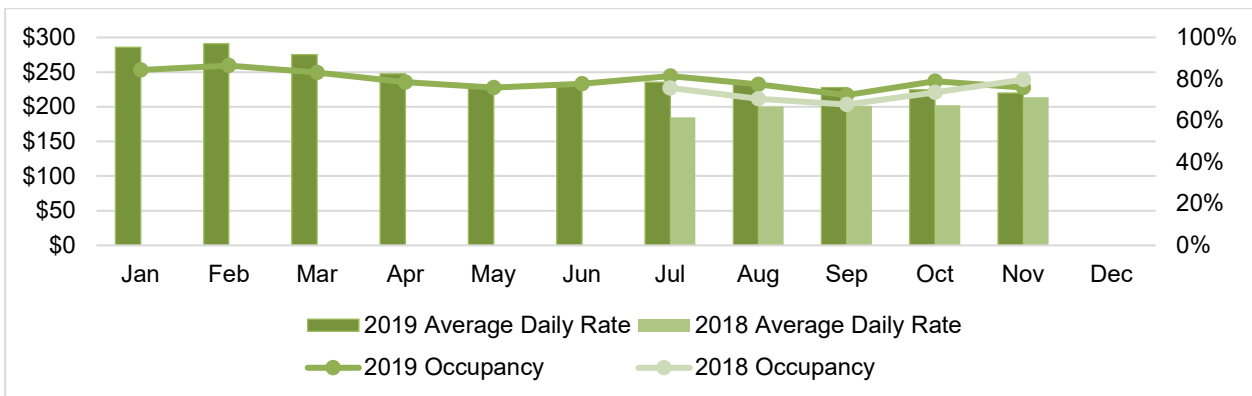
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Note: Data for January – June 2018 are not available.

**Figure 4: Monthly O'ahu Vacation Rental Performance - 2019**



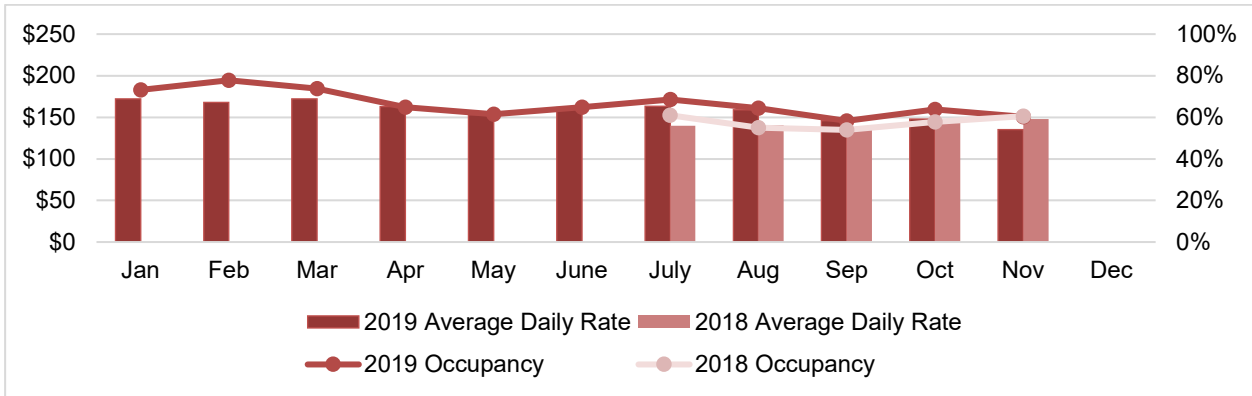
Source: Transparent Intelligence, Inc. © Copyright 2019 Hawai'i Tourism Authority.  
Note: Data for January – June 2018 are not available.

**Figure 5: Monthly Maui County Vacation Rental Performance - 2019**



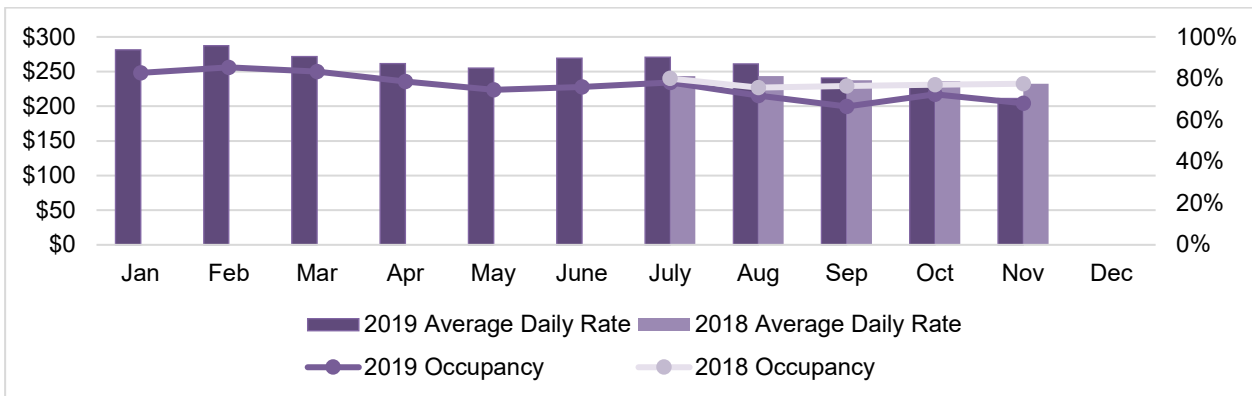
Source: Transparent Intelligence, Inc. © Copyright 2019 Hawai'i Tourism Authority.  
Note: Data for January – June 2018 are not available.

**Figure 6: Monthly Island of Hawai'i Vacation Rental Performance - 2019**



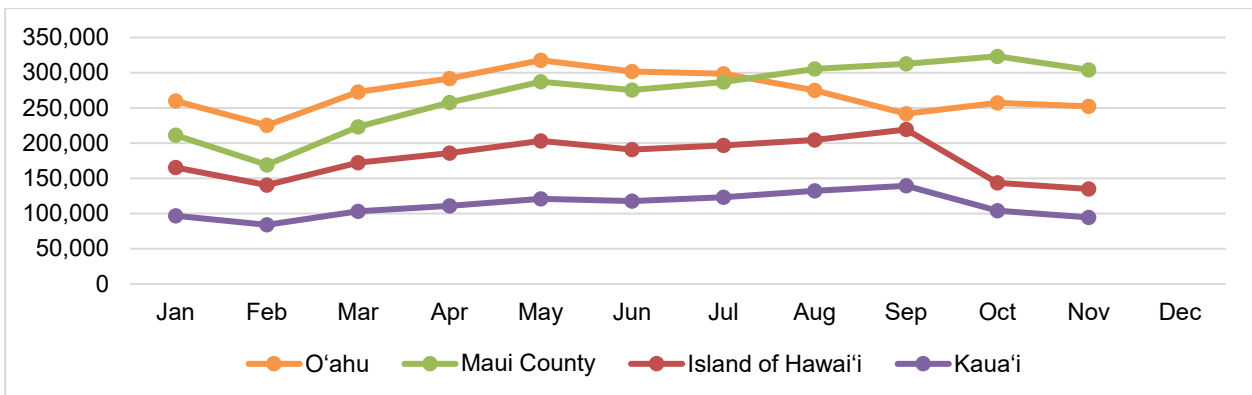
Source: Transparent Intelligence, Inc. © Copyright 2019 Hawai'i Tourism Authority.  
Note: Data for January – June 2018 are not available.

**Figure 7: Monthly Kaua'i Vacation Rental Performance - 2019**



Source: Transparent Intelligence, Inc. © Copyright 2019 Hawai'i Tourism Authority.  
Note: Data for January – June 2018 are not available.

**Figure 8: Monthly Unit Night Supply by Island - 2019**



Source: Transparent Intelligence, Inc. © Copyright 2019 Hawai'i Tourism Authority.  
Note: Data for January – June 2018 are not available.