

2017 VISITOR PLANT INVENTORY



Tourism Research

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PREFACE

The 2017 Visitor Plant Inventory (VPI) report was produced by Kloninger & Sims Consulting LLC for the Hawai'i Tourism Authority (HTA).

As part of the Tourism Research program, HTA conducted a survey on statewide visitor accommodations in 2017. This report provides the results of this survey presenting statistics on the number of visitor units, island distribution, type of property and class of rooms. As in previous reports, island and district names were written in proper Hawaiian language orthography. However, individual property names were not written in the same manner unless the words were easily identifiable (i.e., island names).

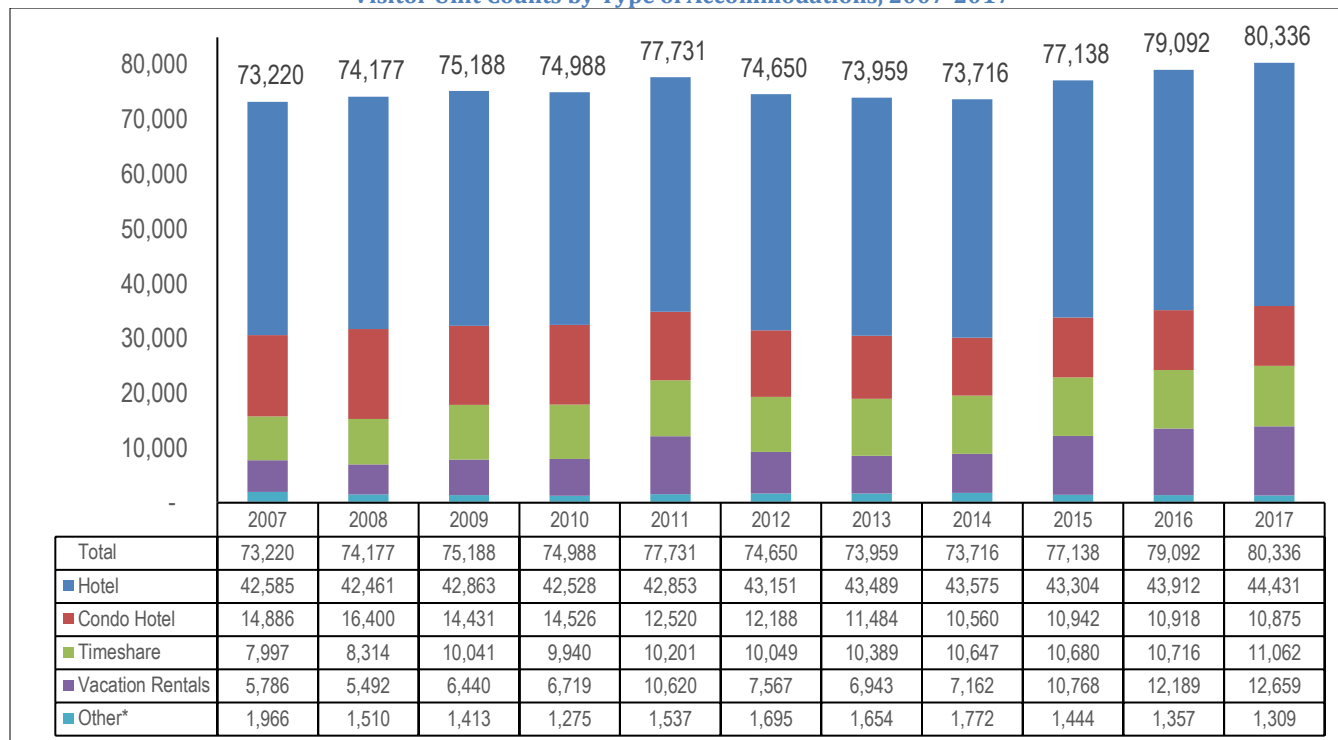
The Hawai'i Visitors and Convention Bureau (HVCB) first published the Visitor Plant Inventory in 1964 and every year thereafter, except 1995 and 1998. HVCB did not conduct a survey in 1995 and did not publish hard copies of the report in 1998. The Department of Business, Economic Development and Tourism (DBEDT) published the VPI reports annually from 1999 through 2008.

The 2017 Visitor Plant Inventory report is posted on the HTA website: www.hawaiiitourismauthority.org/research.

For further information, contact HTA at (808) 973-2255, www.hawaiiitourismauthority.org.

Executive Summary

Visitor Unit Counts by Type of Accommodations, 2007-2017



*Other includes Apartment Hotels, B&Bs, Hostels, and Other units.

The number of visitor units in the State of Hawai'i increased by 1.6 percent in 2017 for a total of 80,336 units.

The large majority of the lodging supply in the State was made up by hotel units (55.3 percent) with 44,431 units, slightly higher compared to 2016 (1.2 percent) due to new hotels opening and hotel properties reopening after renovation or redevelopment. 60.1 percent of all hotel rooms were located on O'ahu (27,102).

Vacation Rental units¹ accounted for 15.8 percent of all lodging units in 2017 (12,659 units), growing by 3.9 percent over 2016. Vacation Rental² include condominium units, houses, villas, cottages, and private and shared rooms.

The number of visitor units at Timeshare properties saw an increase in 2017, now accounting for 11,062 units (3.2 percent).

Condo Hotels, accounting for 10,875 visitor units. Condo Hotels consist of individually deeded condominium units but provide hotel-like services such as a front desk and often daily housekeeping service. The overall number of Condo Hotel units decreased by 0.4 percent. Most of the State's Condo Hotel supply was located on Maui (4,402 units) and O'ahu (4,246 units).

¹ Vacation Rental Units were referred to as Individual Vacation Units ("IVU") prior to the 2014 VPI.

² The VPI's definition of Vacation Rental is presented on page 50. VPI Vacation Rentals should not be equated with other definitions of transient vacation rental units as described by county-level ordinances.

Overview of Methodology

Visitor Plant Inventory & Individually Advertised Units in Hawai'i Reports

Data Collection

The VPI data were gathered by surveying properties in the VPI database. Additional surveyed properties were identified using a variety of data sources.

The supplemental Individually Advertised Units data were based on a point-in-time data extraction from three vacation rental booking sites. The number of properties listed on these booking sites is highly fluid because a property can be listed or unlisted based on market changes or changes in ownership. In addition, this data collection method likely over-counts the number of Individually Advertised Units due to the practice of listing rentals on multiple booking sites and the use of these booking sites as a marketing channel for traditional visitor units such as hotel rooms and timeshare stays. An estimate of the number of Individually Advertised Vacation Rentals, net of duplication is provided on page 71. It should be noted that this is only an estimate.

Terminology for Vacation Rental Units

There are different terms used in Hawai'i to identify vacation rentals, including TVRs, TVUs, IVUs and VRUs. Several of these terms are defined by county-level ordinance. The VPI uses the term "Vacation Rental Units," which is comprised of three different types of properties (VR-Condo, VR-House, and VR-Other) and should not be used interchangeably with other legally defined terms.

When to Use VPI vs. Individually Advertised Unit data

The VPI provides data on the supply of visitor accommodations in the State of Hawai'i **across all property types**, in a time series that dates back to 1965.

The Individually Advertised Unit data provide supplemental information primarily on the evolving segment of vacation rentals, including important data on pricing and the geographical location of the vacation rental supply.

Visitor Plant Inventory

State of Hawai'i

The total number of units in the State of Hawai'i visitor plant inventory for 2017 increased to 80,336 visitor units, 1.6 percent higher than in 2016 [Figure 2].

Nearly half (47.9 percent) of the State's visitor units were located on O'ahu, with the majority of units located in Waikīkī. Maui had the second most number of visitor units (26.5 percent) followed by Hawai'i Island (14.0 percent) and Kaua'i (11.0 percent). Moloka'i and Lāna'i had the fewest lodging units and combined totaled less than one percent of all Hawai'i lodging units.

The large majority of the lodging supply in the State was made up by hotel units (55.3 percent). Vacation Rentals, Timeshare units, and Condominium Hotels accounted for 15.8 percent, 13.8, and 13.5 percent of all lodging units, respectively.

Figure 1: State of Hawai'i - Inventory by Island (Units)

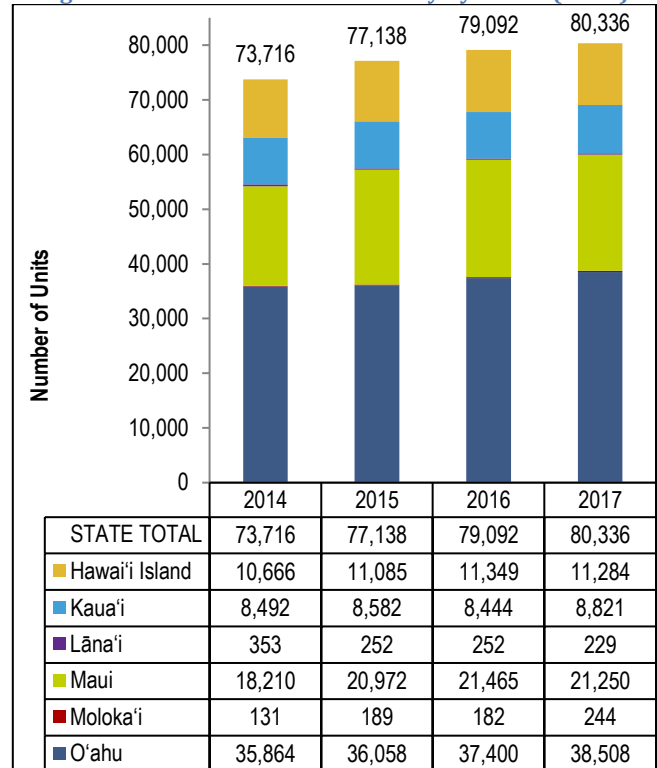


Figure 2: State of Hawai'i - Inventory by Unit Type

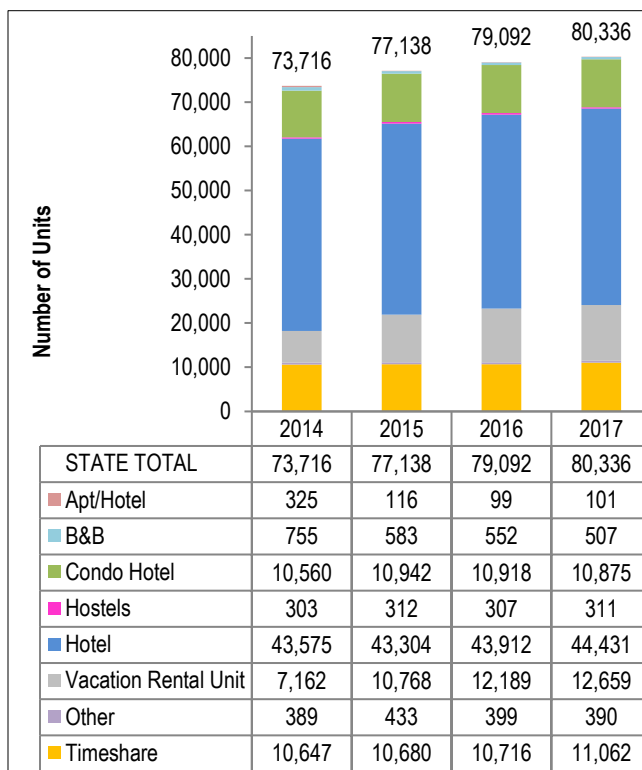


Figure 3: State of Hawai'i - Inventory by Island (Properties)

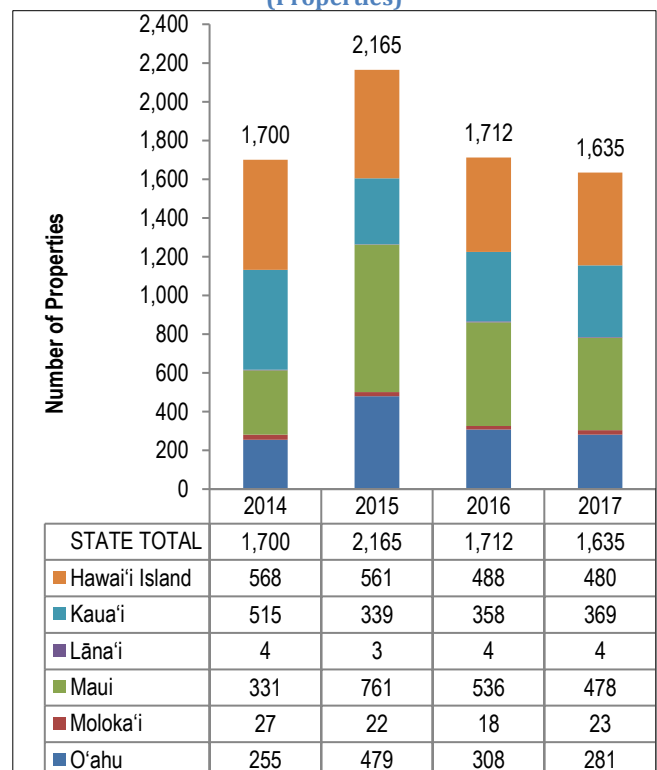


Figure 4: State of Hawai'i - Inventory by Property Type

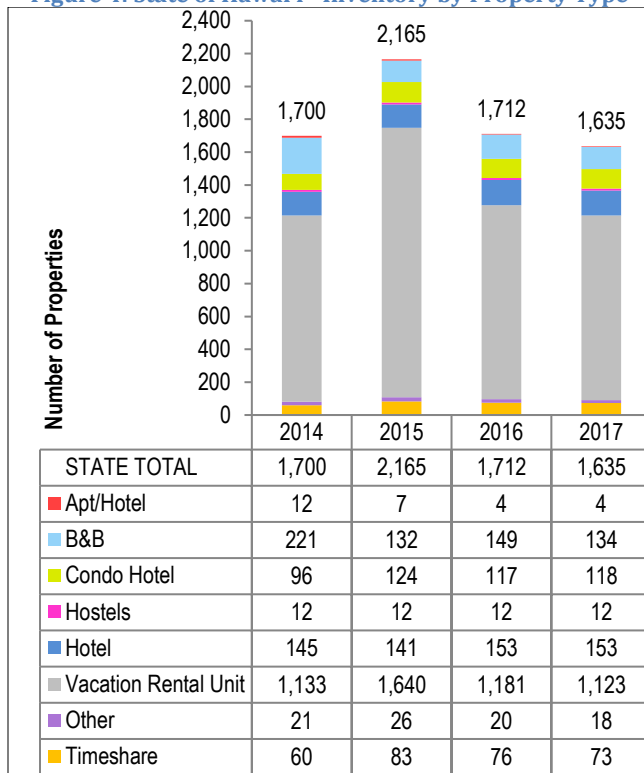
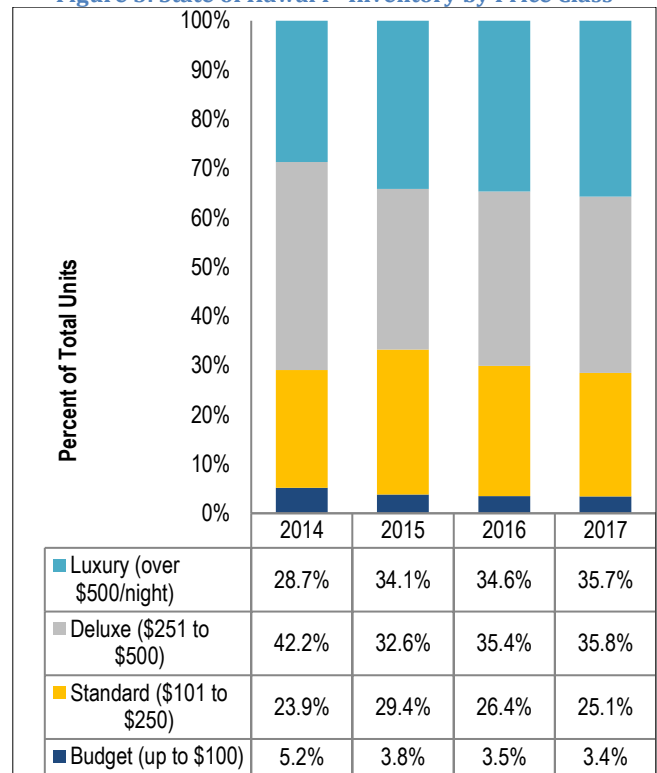


Figure 5: State of Hawai'i - Inventory by Price Class



Inventory by Island

Island of Hawai'i

The overall visitor unit count on Hawai'i Island decreased by 0.6 percent from 2016.

- Hotels continued to comprise the bulk of Hawai'i Island's visitor plant inventory (6,512 units) [Figure 6].
- The decrease in hotel units on Hawai'i Island was due to renovations of the Hapuna Beach Prince Hotel, which resulted in a decrease in total rooms.
- Waikoloa Beach Marriott Resort & Spa went through redevelopment and opened Marriott's Waikoloa Ocean Club with 112 timeshare units.
- In 2017, a higher proportion of visitor units were categorized in the Luxury category compared to previous years (27.9 percent).

Figure 6: Hawai'i Island - Inventory by Unit Type

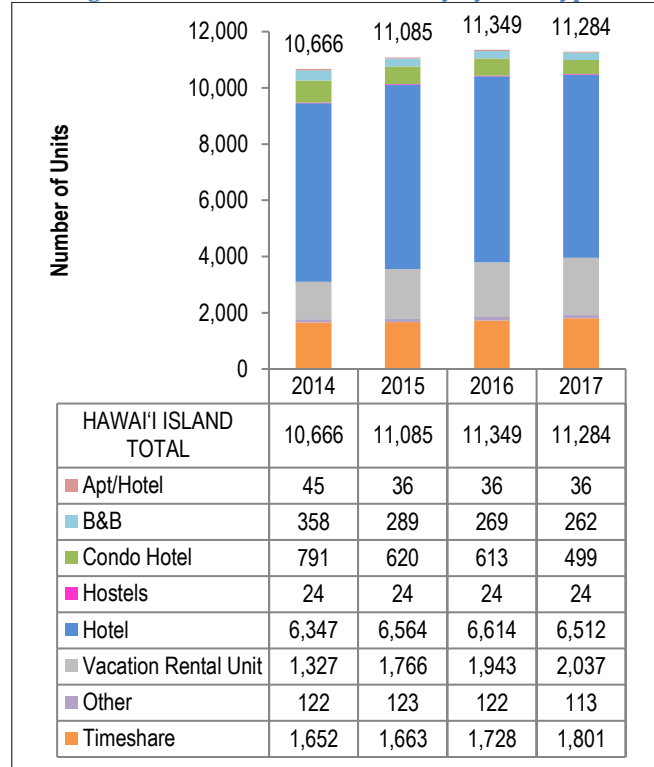


Figure 7: Hawai'i Island - Inventory by Property Type

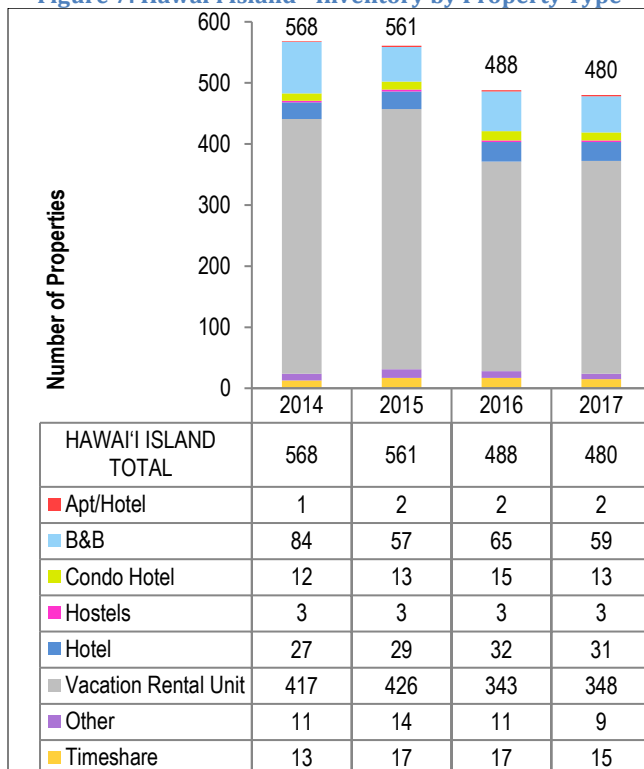
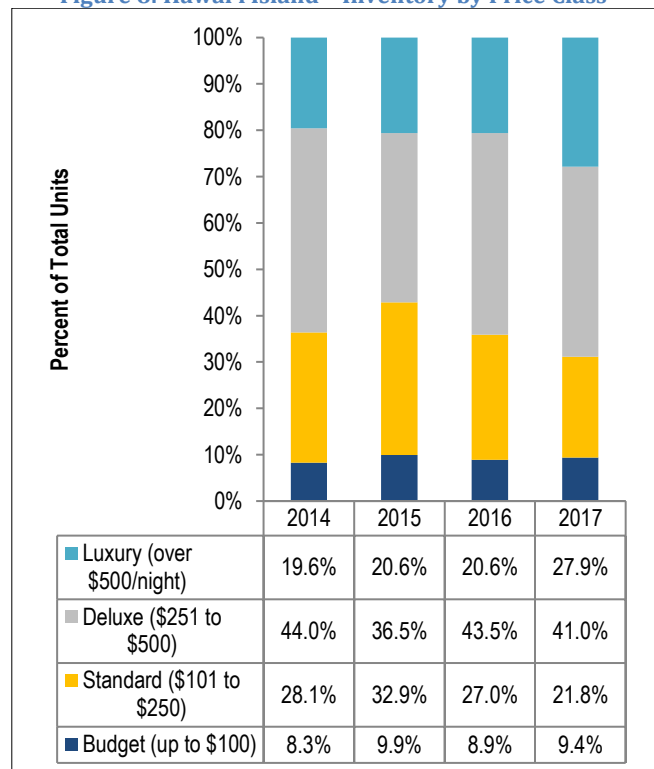


Figure 8: Hawai'i Island - Inventory by Price Class



Kaua'i

The number of visitor units on Kaua'i totaled 8,821 units, a 4.5 percent increase over the previous year.

- Hotel units made up the largest share of visitor units on Kaua'i (32.3 percent) followed by Timeshare units (28.9 percent).
- No Apartment Hotels or Hostels were reported on Kaua'i in 2015 or 2016.
- The largest percentage of Kaua'i's visitor units continued to fall in the Luxury price class (36.7 percent) in 2017.
- Koloa Landing Resort at Poipu opened in 2017, as part of the rebranding under the Marriott Autograph Collection.

Figure 9: Kaua'i – Inventory by Unit Type

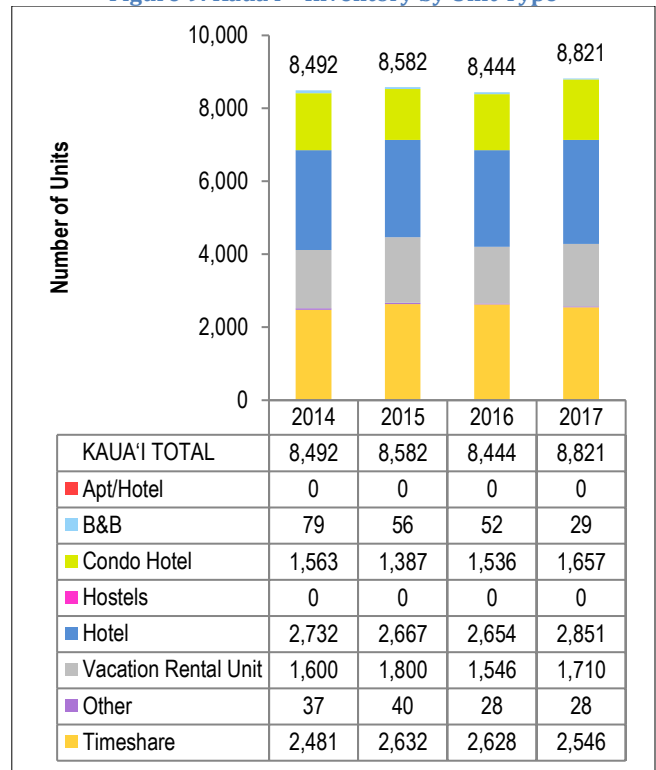


Figure 10: Kaua'i – Inventory by Property Type

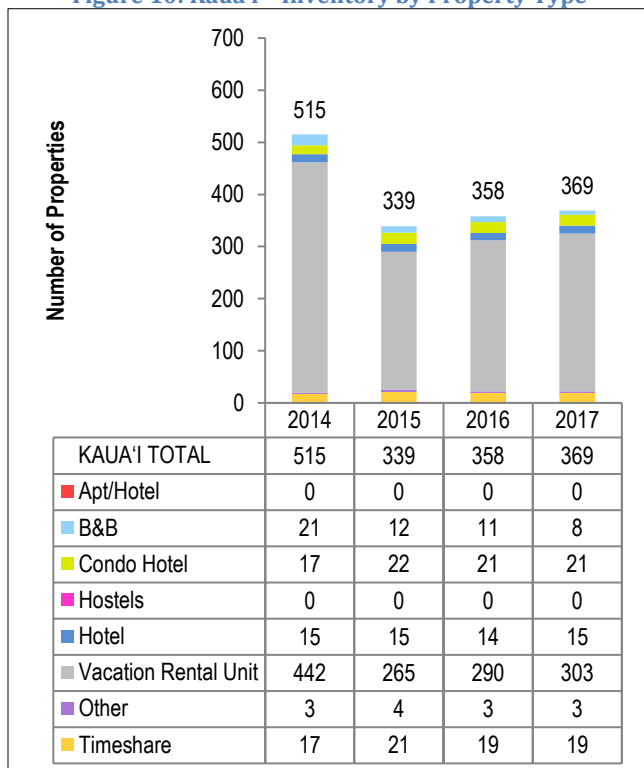
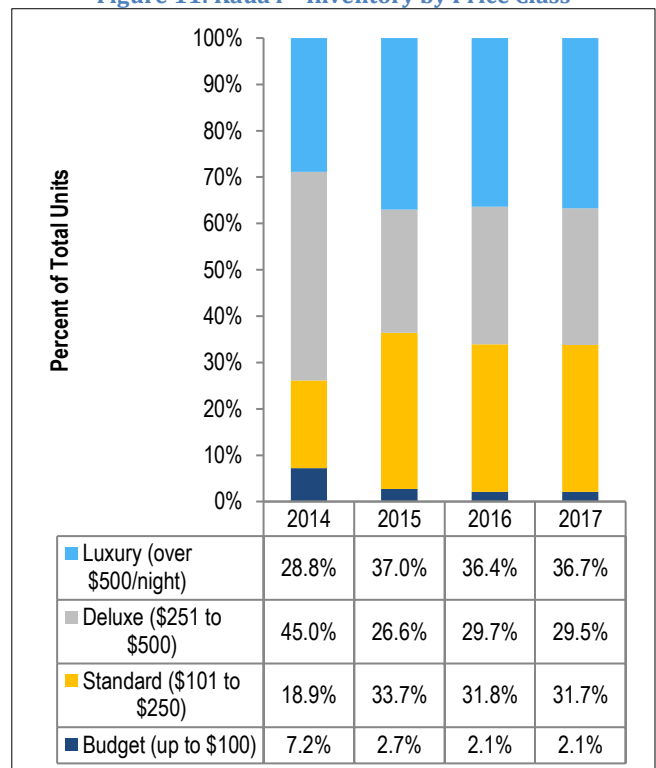


Figure 11: Kaua'i – Inventory by Price Class



Maui

The overall number of lodging units on Maui totaled 21,250 units, a slight decrease over the previous year. (-1.0 percent).

- Hotel Rooms continued to account for the largest share of Maui's visitor units in 2017, with about 36.4 percent of the supply. VRUs represented about 25.8 percent of Maui's visitor accommodation units in 2017, as VRU's share of Maui's total supply of visitor units has increased in recent years.
- The majority of Maui's visitor units were in the Luxury and Deluxe price classes as the bulk of Maui's visitor accommodation supply consists of high-end properties in the luxury regions of Wailea and Lahaina - Kā'anapali - Nāpili - Kapalua [Figure 14]. Luxury and Deluxe priced visitor units combined represented 79.4 percent of the supply.
- Westin Nanea Ocean Villas opened with 195 new timeshare units in April 2017.

Figure 12: Maui - Inventory by Unit Type

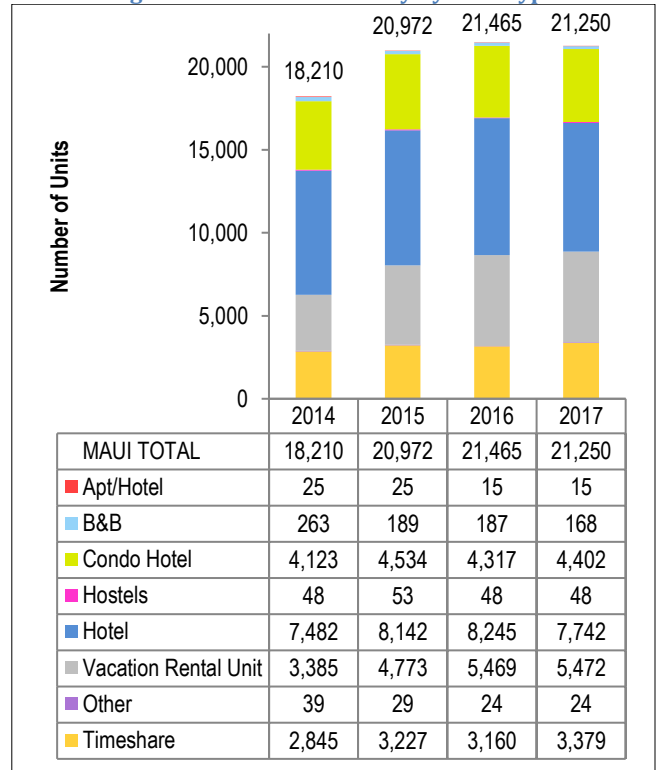


Figure 13: Maui - Inventory by Property Type

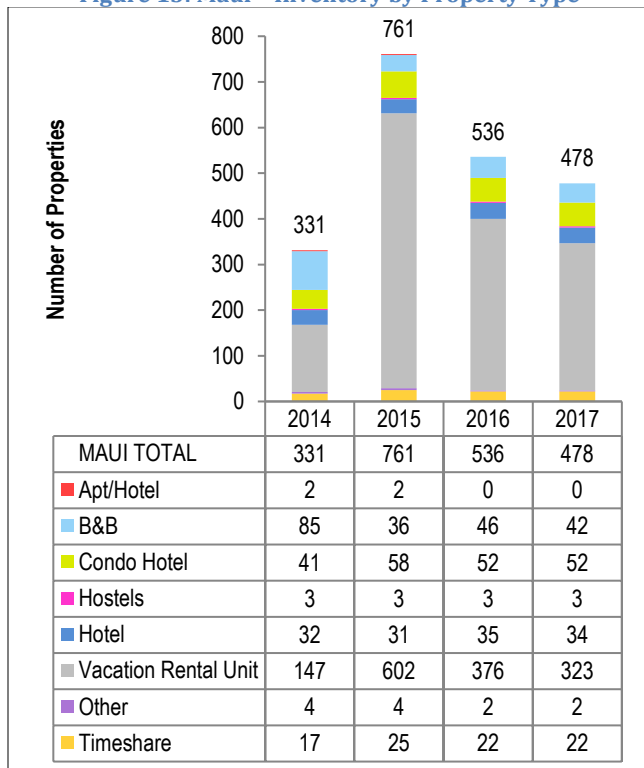
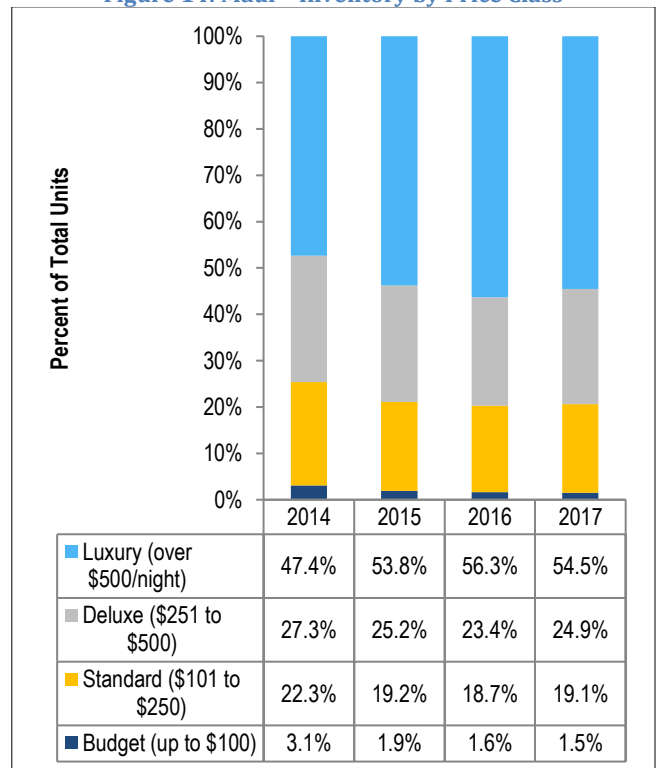


Figure 14: Maui - Inventory by Price Class



Moloka'i

The overall visitor unit count on Moloka'i increased in 2017, with increases in the Vacation Rental category. This due to an increased in reported VR Condos available at condo hotels.

- There were no Hotels, Hostels or Apartment Hotels on Moloka'i in 2017 [Figure 16].
- All of Moloka'i's units fell within the Standard or Budget price classes (57.1 and 42.9 percent, respectively) [Figure 17].

Figure 15: Moloka'i – Inventory by Unit Type

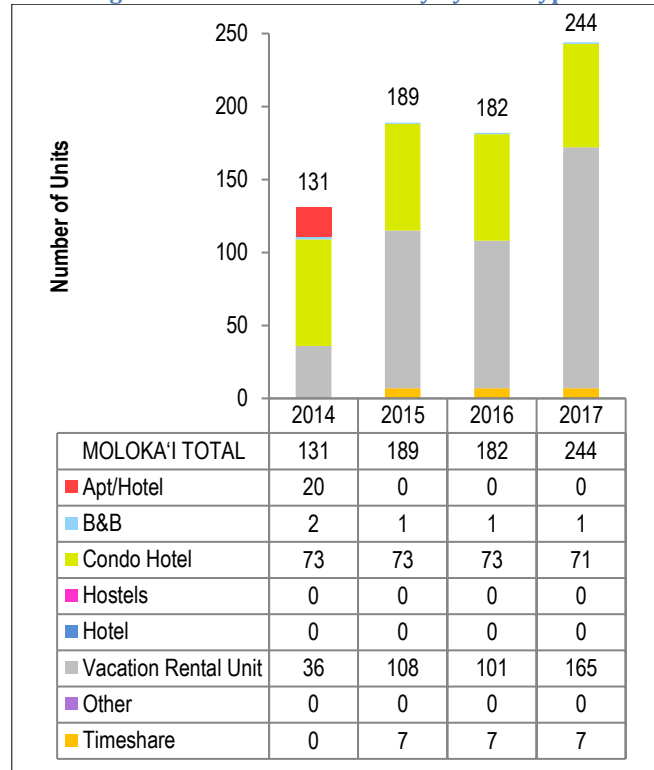


Figure 16: Moloka'i – Inventory by Property Type

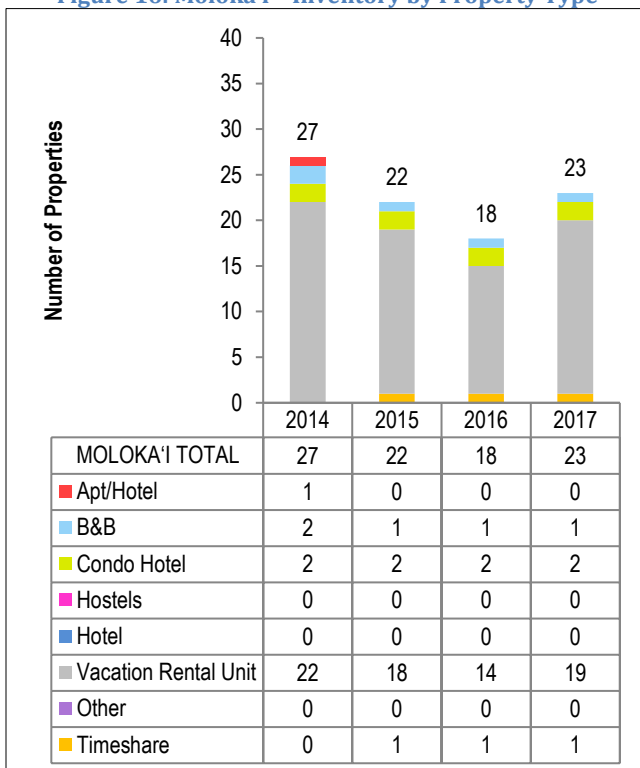
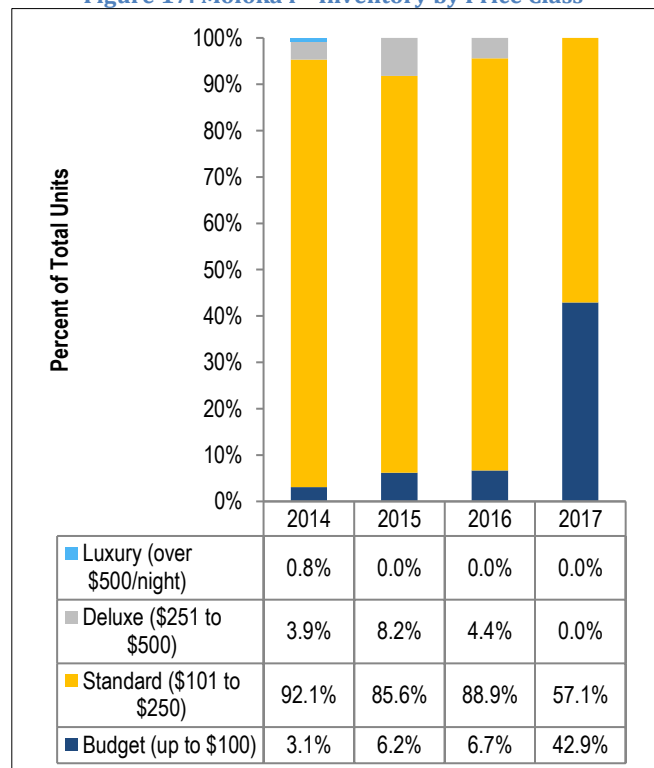


Figure 17: Moloka'i – Inventory by Price Class



Lānaʻi

Lānaʻi's visitor supply has been relatively stable and dominated by two Four Seasons-branded hotels. In the last couple of years, the two main hotels on the island closed for renovations.

- The Four Seasons Resort Lodge at Koele, which has been closed since January 2015, remained closed in 2017.
- Hotel units still comprised the majority of Lānaʻi's lodging supply (97.8 percent). All other property types totaled only 5 units [Figure 18].
- Nearly all of Lānaʻi's units fell within the Luxury and Deluxe price classes (93.4 percent) [Figure 20].

Figure 18: Lānaʻi – Inventory by Unit Type

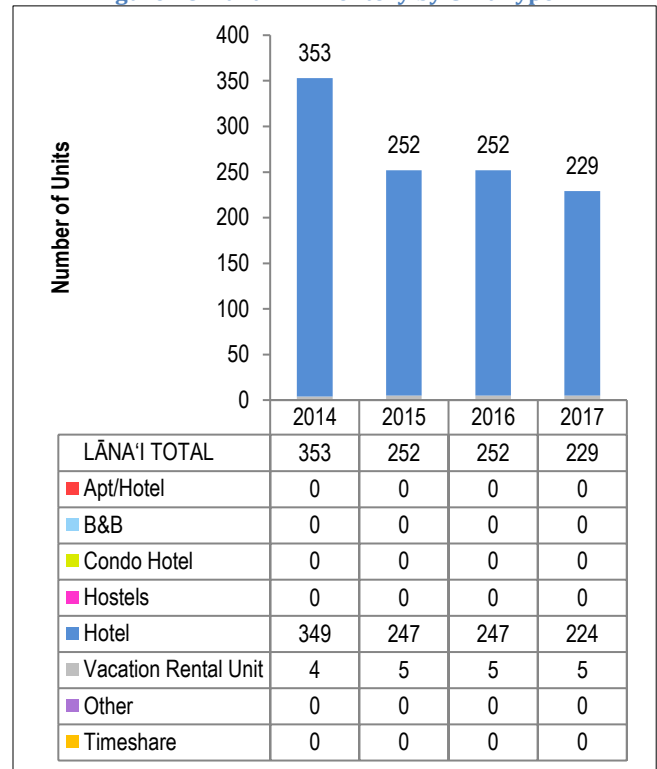


Figure 19: Lānaʻi – Inventory by Property Type

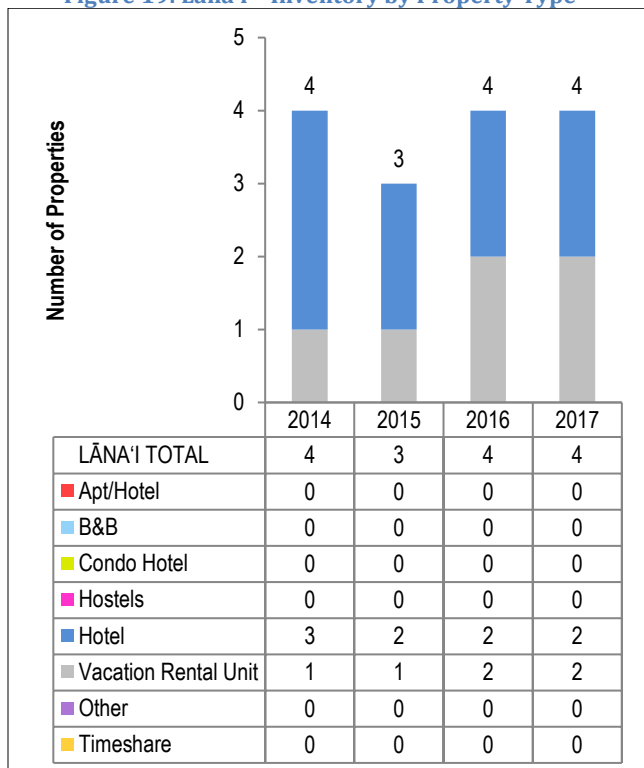
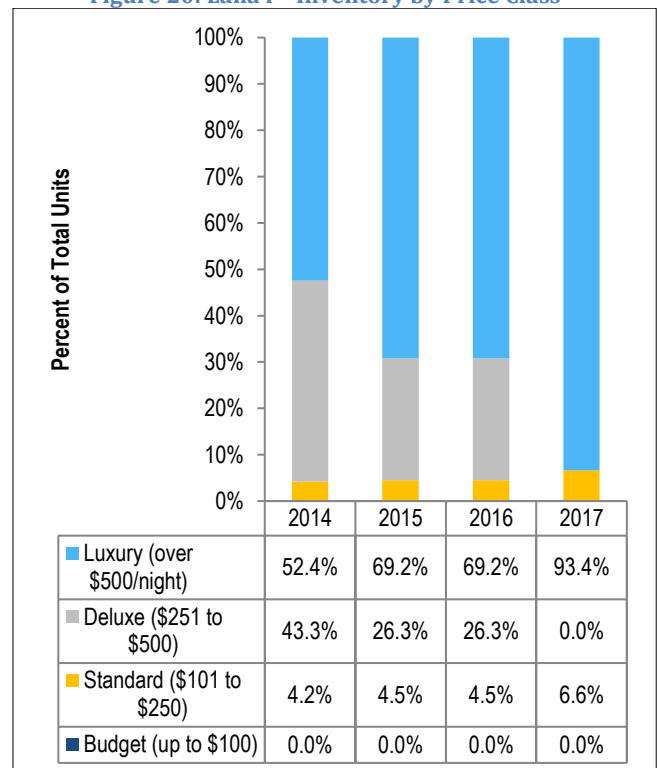


Figure 20: Lānaʻi – Inventory by Price Class



O'ahu

The number of visitor units on O'ahu increased (+3.0 percent) to 38,508 in 2017. The increase was driven by the growth of Vacation Rental Units.

- Hotels continued to dominate O'ahu's overall supply in 2017, accounting for about 70.4 percent of the supply.
- The O'ahu hotel supply saw an increase over the previous year due to several new hotels openings (including Hampton Inn & Suites, Hyatt Centric Waikiki Beach) and reopening after renovations or rebranding (Prince Waikiki, The Laylow Autograph Collection, and Holiday Inn Express Waikīkī, formerly the Maile Sky Court).
- Condo Hotels were the second largest accommodation type, representing 11.0 percent of all units, followed by Timeshare (8.6 percent) and VRUs (8.5 percent).

Figure 21: O'ahu - Inventory by Unit Type

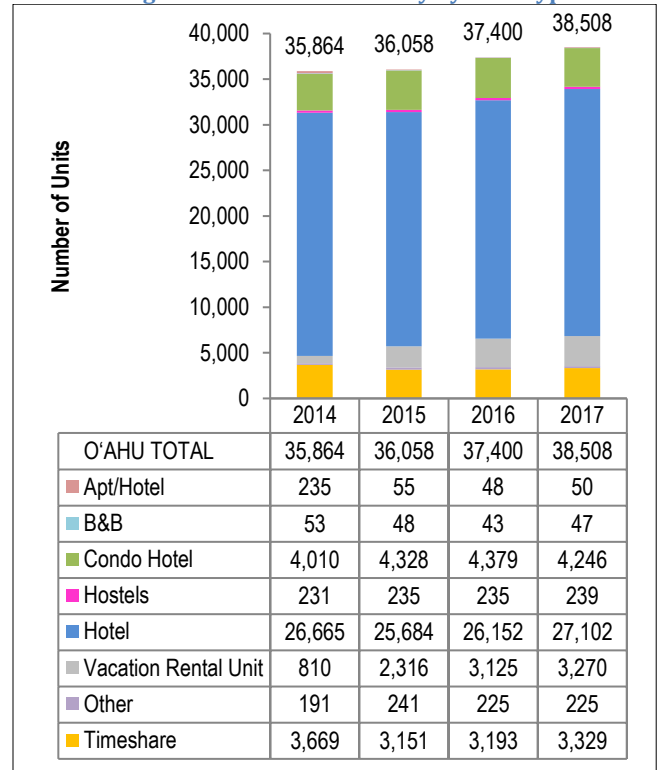


Figure 22: O'ahu - Inventory by Property Type

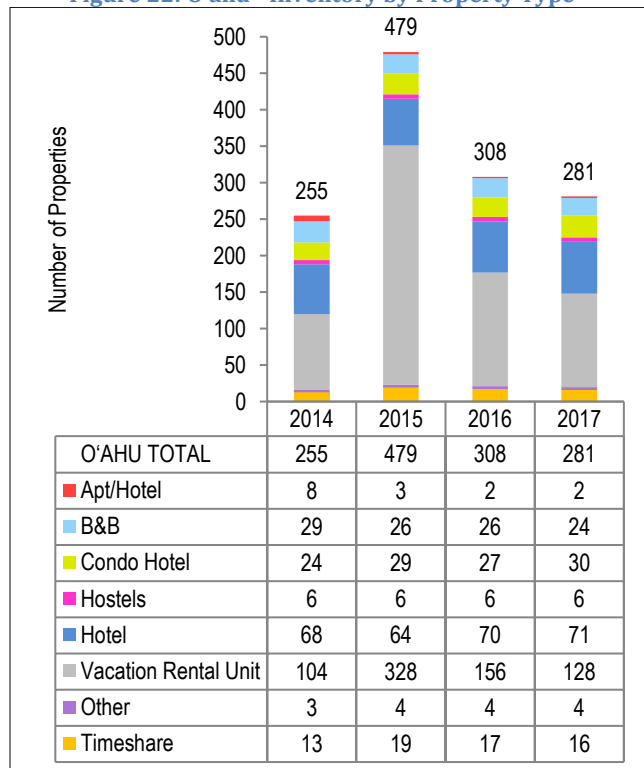
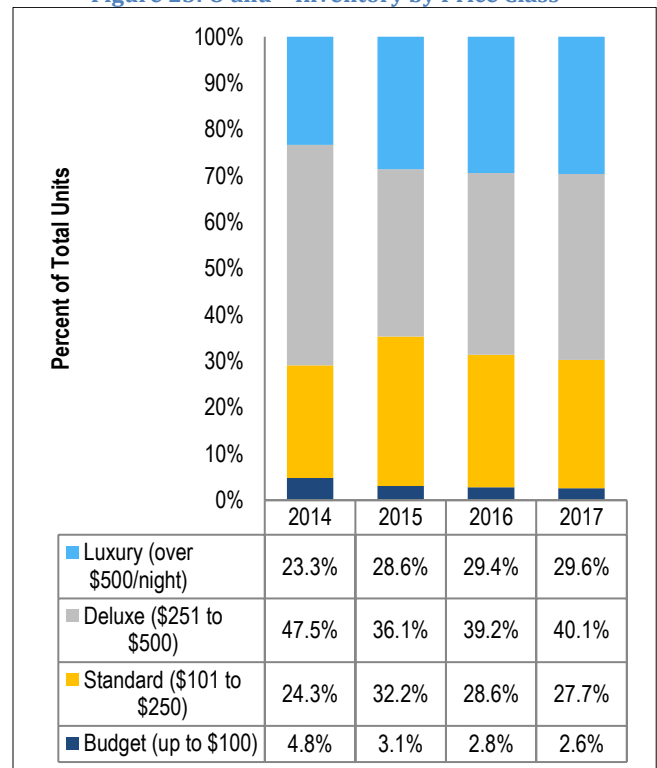


Figure 23: O'ahu - Inventory by Price Class

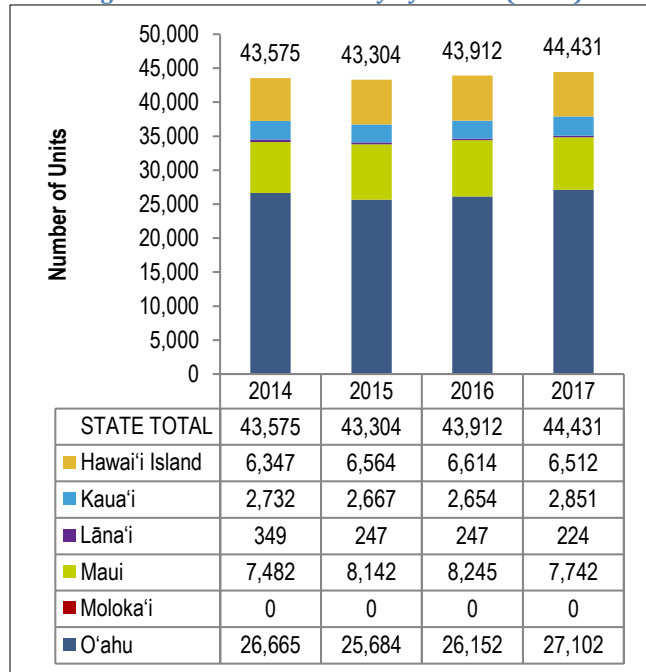


Inventory by Type

Hotels

Hotel units made up the largest share of all visitor units in the State, and O'ahu continues to supply the majority of these units (60.1 percent).

Figure 24: Hotel - Inventory by Island (Units)



Condominium Hotels

The statewide number of Condo Hotel units decreased slightly (0.4 percent). Condo hotel units comprised 13.5 percent of statewide visitor units in 2017.

Figure 26: Condo Hotel - Inventory by Island (Units)

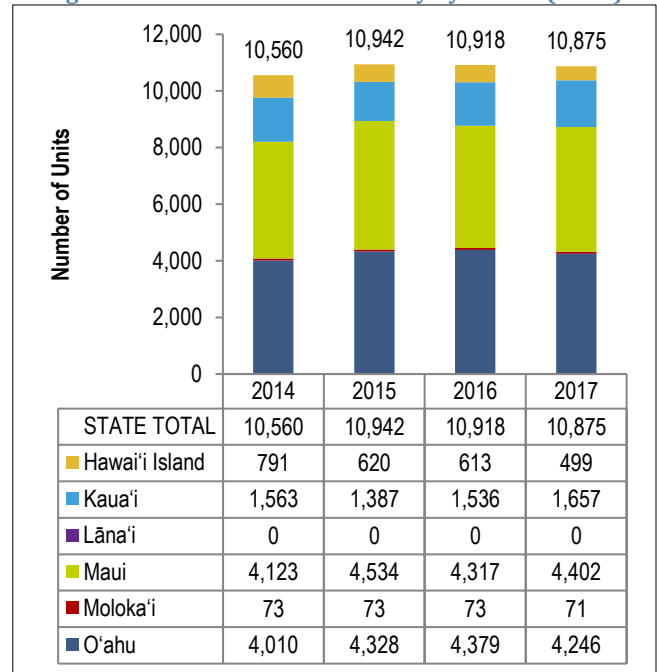


Figure 25: Hotel - Inventory by Island (Properties)

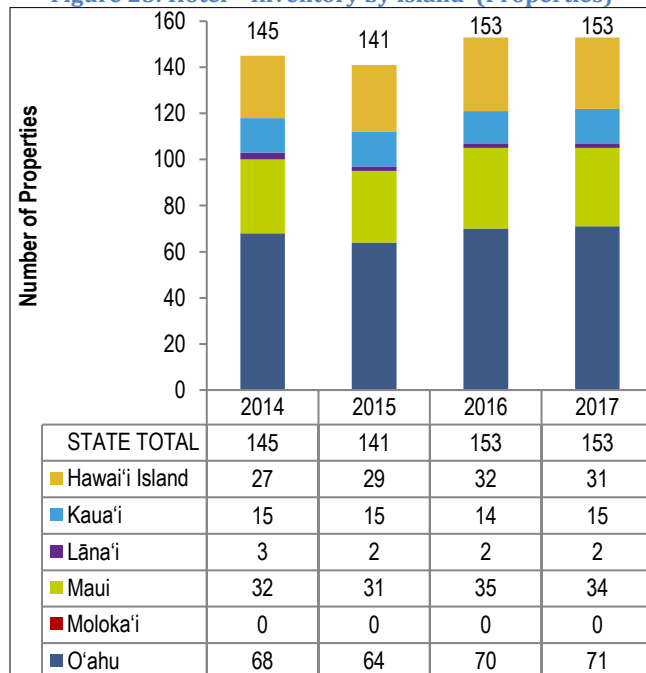
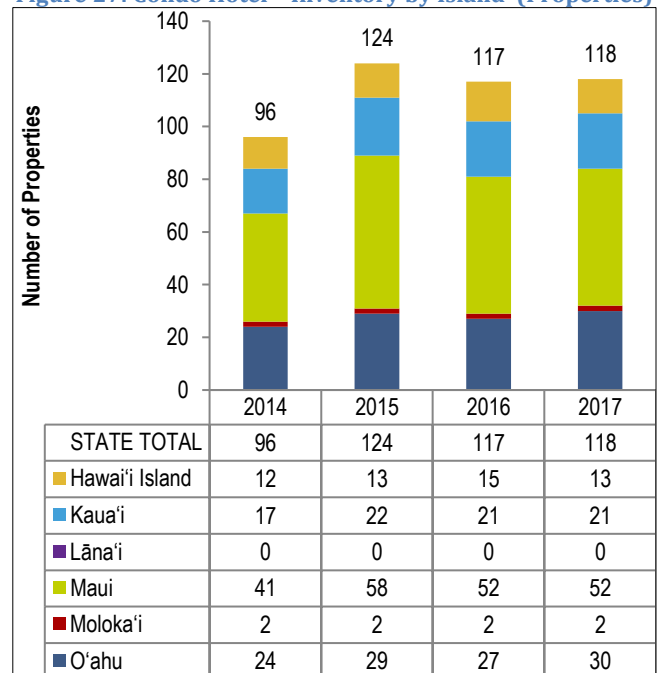


Figure 27: Condo Hotel - Inventory by Island (Properties)



Timeshares

The state's timeshare supply increased over the previous year (3.2) with little change compared to the previous year. The largest share of units are still located on Maui and O'ahu, with 30.5 and 30.1 percent of all units, respectively [Figure 28].

Figure 28: Timeshare – Inventory by Island (Units)

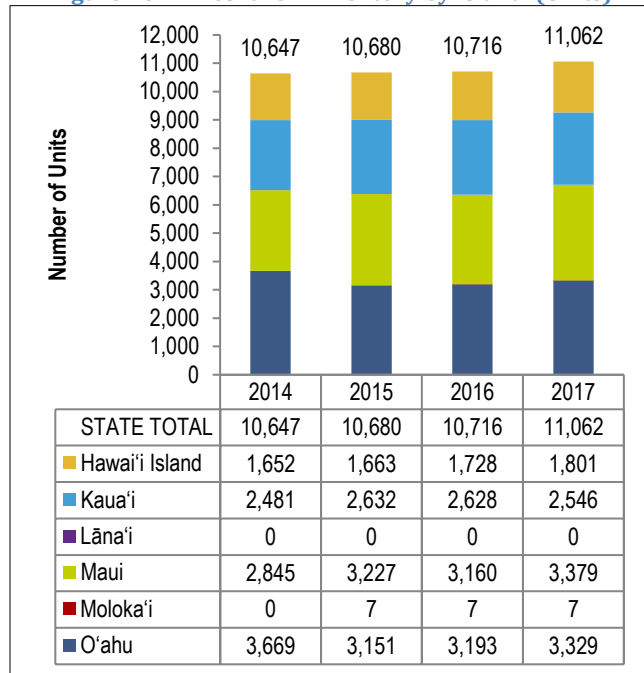
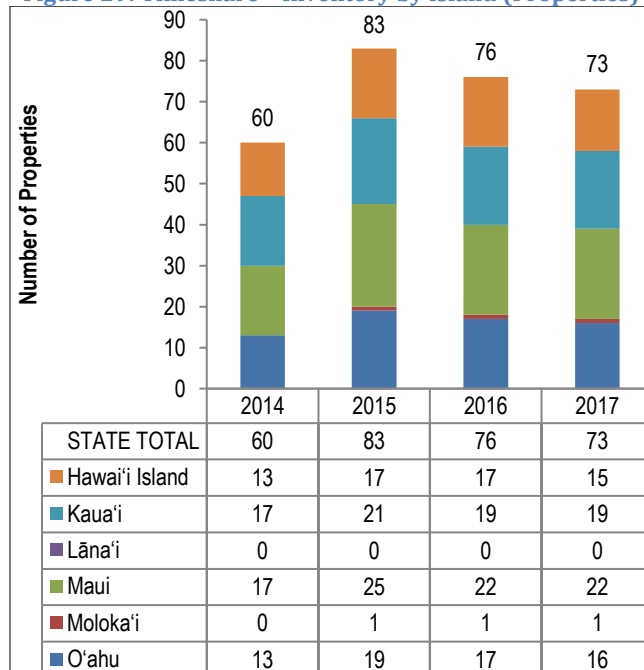


Figure 29: Timeshare – Inventory by Island (Properties)



Bed & Breakfasts

B&B units across the State decreased by 8.2 percent compared to 2016, due to property closures and reclassification to other unit types.

Figure 30: B&B – Inventory by Island (Units)

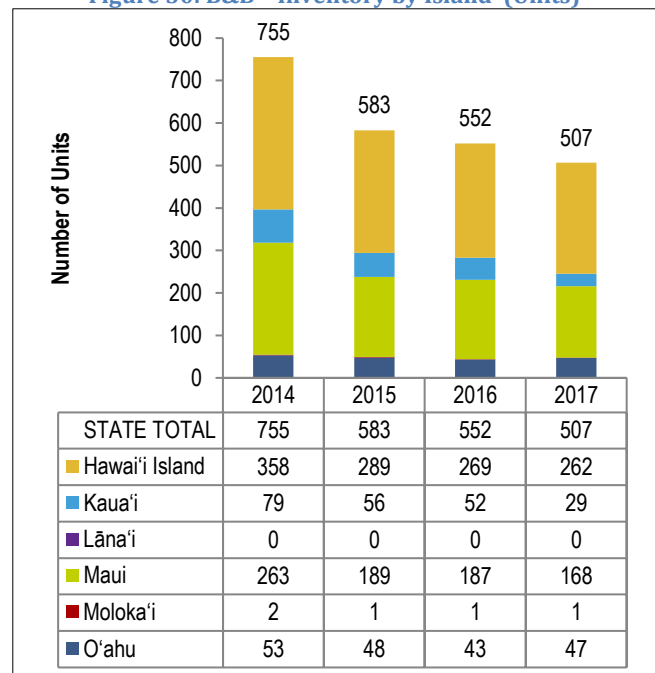
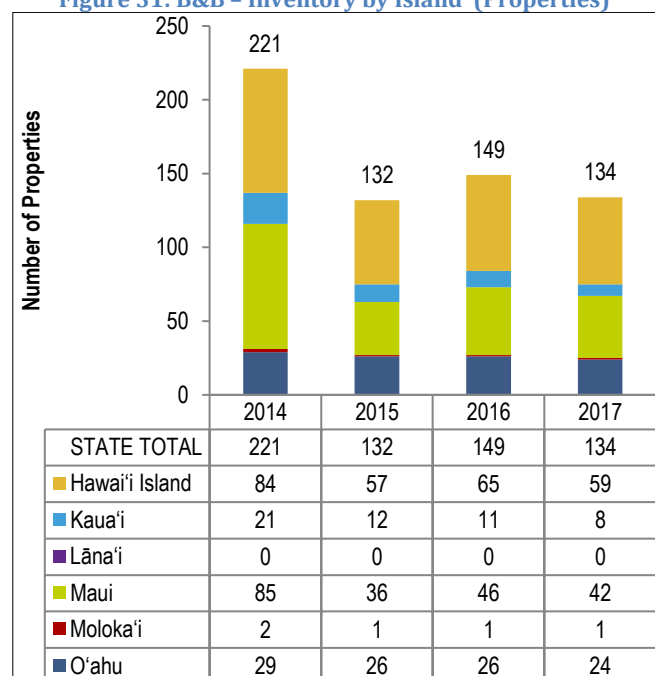


Figure 31: B&B – Inventory by Island (Properties)



Vacation Rental Units

The number of Vacation Rental units (VR units) in the state increased over the previous year (3.9 percent). Maui has the largest inventory of Vacation Rental units with a 30.5 percent share

of the state's total supply. The majority of Vacation Rental units were represented by VR Condo units, representing 91.0 percent of all reported Vacation Rental units.

Figure 32: Vacation Rentals – Inventory by Island (Units)

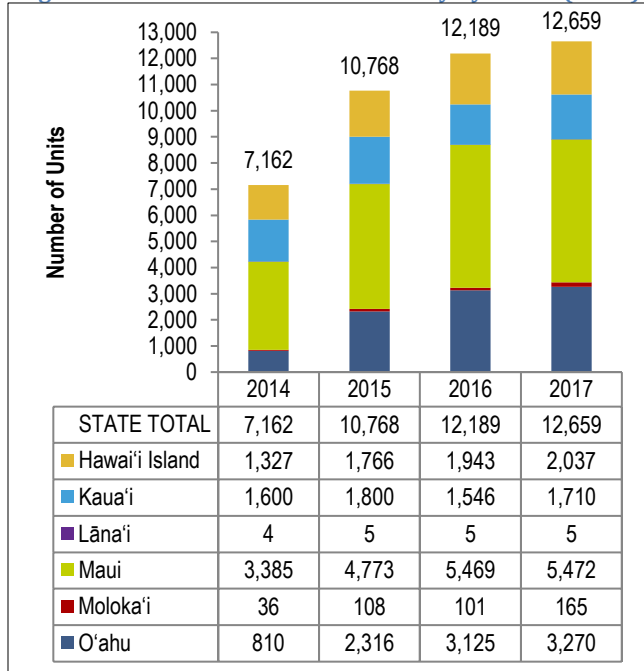


Figure 34: Vacation Rentals – Units by Type

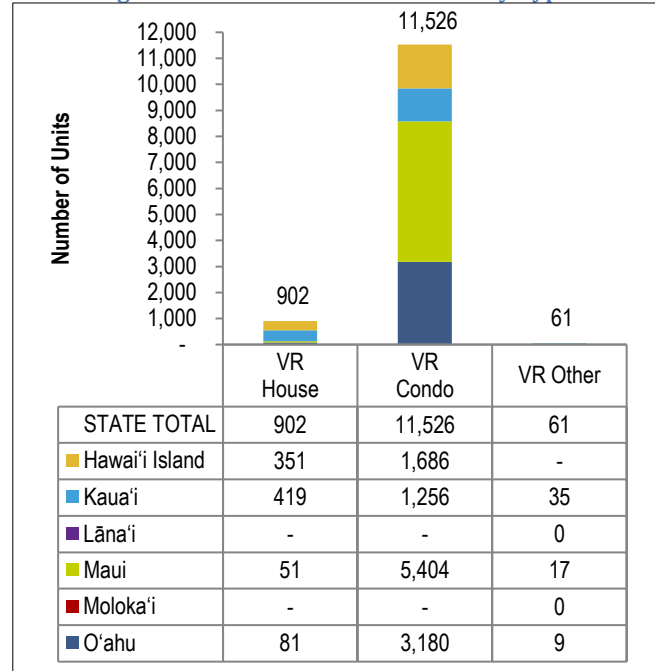
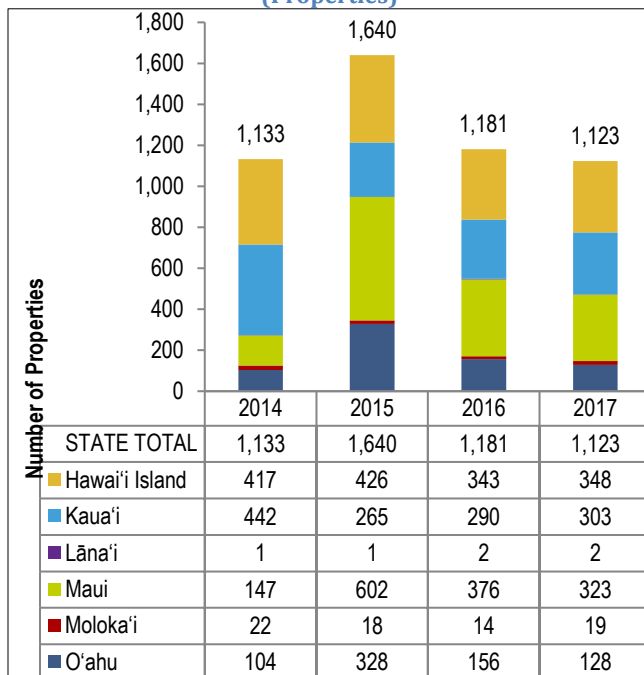


Figure 33: Vacation Rentals – Inventory by Island (Properties)



Apartment/Hotels

The overall State supply of Apartment Hotel units was relatively unchanged over the previous year (+2.0 percent). The number of reported properties remained the same in 2017.

Figure 35: Apartment/Hotel – Inventory by Island (Units)

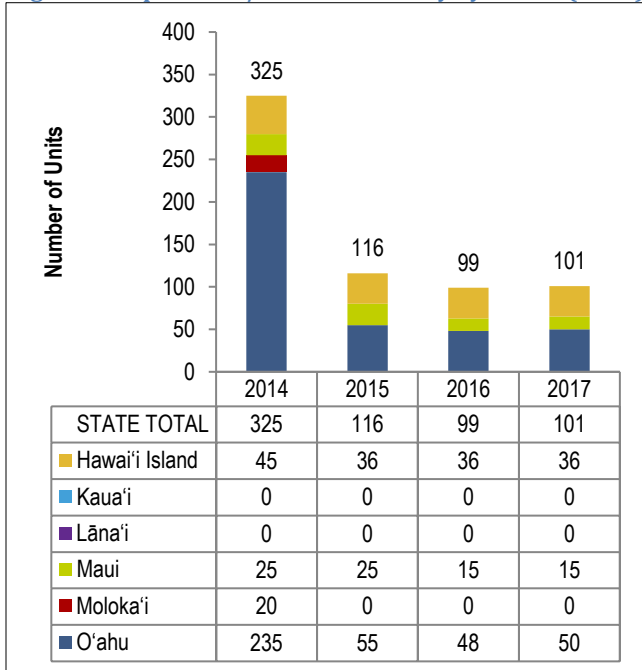
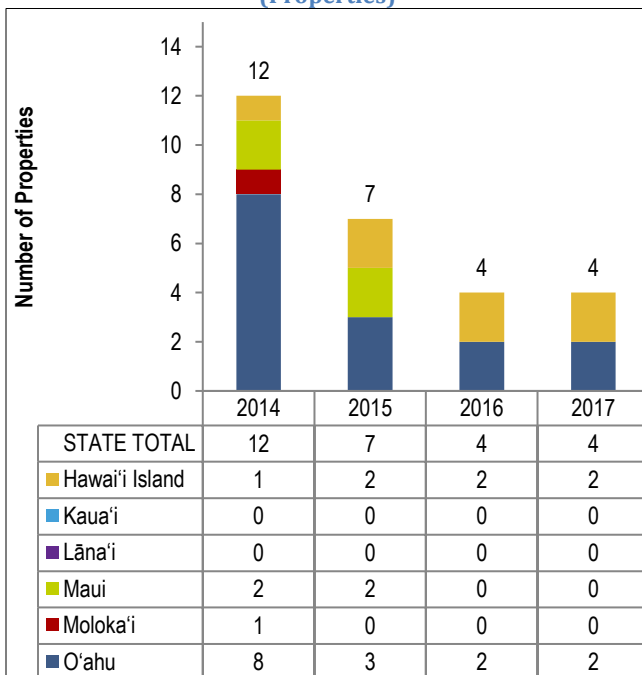


Figure 36: Apartment/Hotel – Inventory by Island (Properties)



Hostels

The overall number of Hostel properties in the State increased in 2017 (1.3 percent).

Figure 37: Hostel – Inventory by Island (Units)

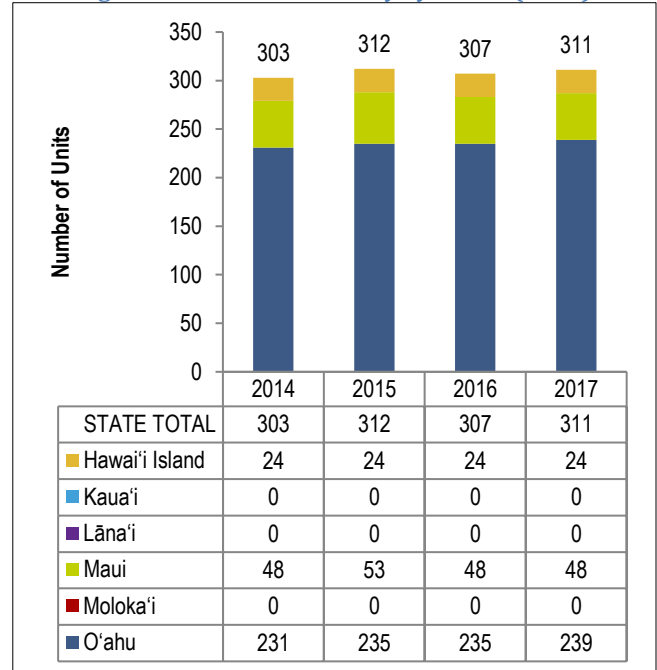
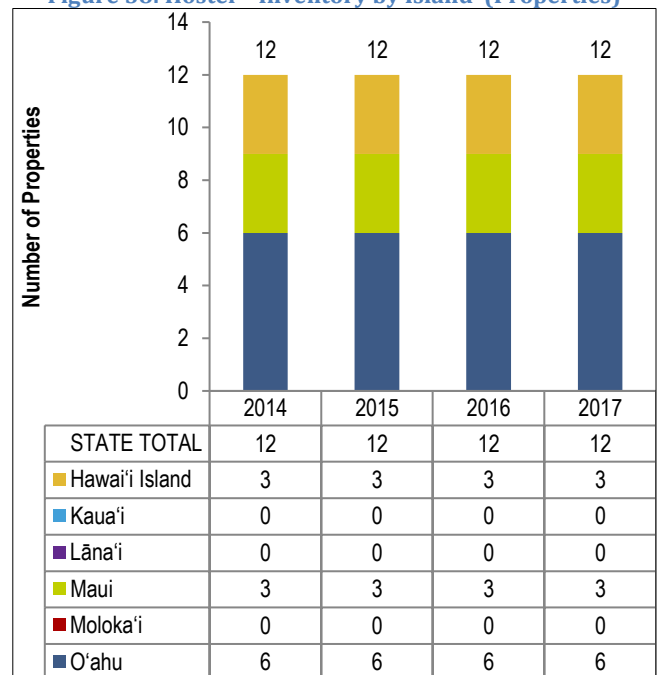


Figure 38: Hostel – Inventory by Island (Properties)



Other

The “Other” category, which includes lodges, inns, and other forms of accommodations, saw a slight decrease in units in 2017 (2.3 percent).

Figure 39: Other – Inventory by Island (Units)

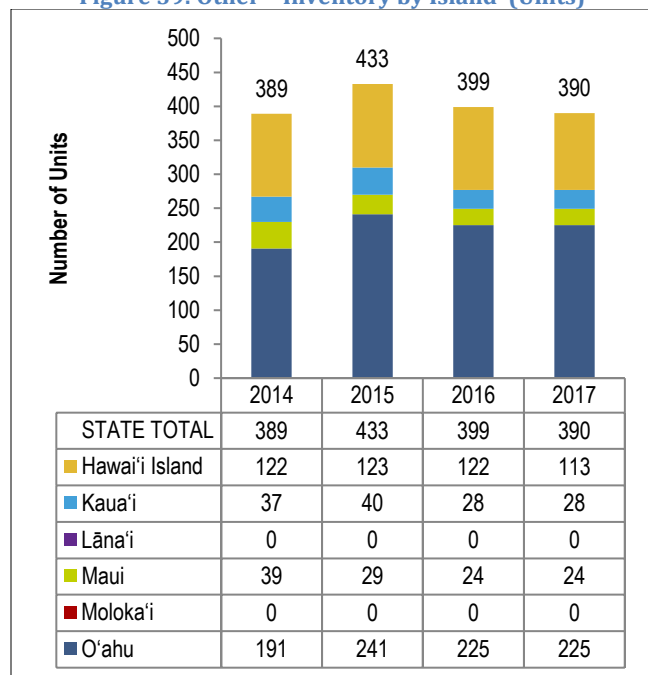
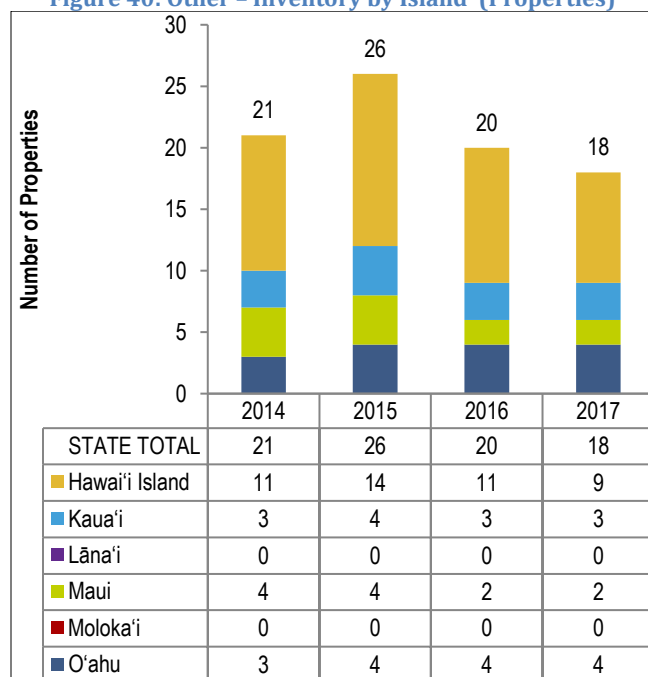


Figure 40: Other – Inventory by Island (Properties)



VISITOR PLANT INVENTORY TABLES

Table 1: Available Units by County, 1965 to 2017³

YEAR	STATE TOTAL	% CHANGE	HAWAI'I ISLAND	% CHANGE	KAUAI	% CHANGE	MAUI COUNTY	% CHANGE	O'AHU	% CHANGE
1965	12,903		865		776		1,231		10,031	
1966	14,827	14.9%	1,387	60.3%	860	10.8%	1,497	21.6%	11,083	10.5%
1967	17,217	16.1%	1,790	29.1%	1,115	29.7%	1,714	14.5%	12,598	13.7%
1968	18,657	8.4%	2,188	22.2%	1,260	13.0%	2,043	19.2%	13,166	4.5%
1969	22,801	22.2%	2,480	13.3%	1,914	51.9%	2,415	18.2%	15,992	21.5%
1970	26,923	18.1%	3,166	27.7%	2,565	34.0%	2,743	13.6%	18,449	15.4%
1971	32,289	19.9%	3,435	8.5%	2,628	2.5%	3,695	34.7%	22,531	22.1%
1972	35,797	10.9%	4,241	23.5%	2,719	3.5%	4,095	10.8%	24,742	9.8%
1973	36,608	2.3%	4,796	13.1%	2,629	-3.3%	4,075	-0.5%	25,108	1.5%
1974	38,675	5.6%	5,234	9.1%	2,868	9.1%	5,208	27.8%	25,365	1.0%
1975	39,632	2.5%	5,348	2.2%	3,102	8.2%	5,830	11.9%	25,352	-0.1%
1976	42,648	7.6%	6,045	13.0%	3,520	13.5%	7,232	24.0%	25,851	2.0%
1977	44,986	5.5%	5,929	-1.9%	3,657	3.9%	8,037	11.1%	27,363	5.8%
1978	47,070	4.6%	6,002	1.2%	3,786	3.5%	8,736	8.7%	28,546	4.3%
1979	49,832	5.9%	6,093	1.5%	4,202	11.0%	9,472	8.4%	30,065	5.3%
1980	54,246	8.9%	5,889	-3.3%	4,322	2.9%	9,701	2.4%	34,334	14.2%
1981	56,769	4.7%	6,705	13.9%	4,738	9.6%	11,359	17.1%	33,967	-1.1%
1982	57,968	2.1%	7,167	6.9%	5,147	8.6%	12,162	7.1%	33,492	-1.4%
1983	58,765	1.4%	7,469	4.2%	4,193	-18.5%	12,749	4.8%	34,354	2.6%
1984	62,448	6.3%	7,149	-4.3%	5,313	26.7%	13,138	3.1%	36,848	7.3%
1985	65,919	5.6%	7,511	5.1%	5,656	6.5%	14,152	7.7%	38,600	4.8%
1986	66,308	0.6%	7,280	-3.1%	5,922	4.7%	14,096	-0.4%	39,010	1.1%
1987	65,318	-1.5%	7,328	0.7%	5,956	0.6%	13,849	-1.8%	38,185	-2.1%
1988	69,012	5.7%	8,823	20.4%	7,180	20.6%	15,168	9.5%	37,841	-0.9%
1989	67,734	-1.9%	8,161	-7.5%	7,398	3.0%	15,708	3.6%	36,467	-3.6%
1990	71,266	5.2%	8,952	9.7%	7,546	2.0%	17,869	13.8%	36,899	1.2%
1991	72,275	1.4%	9,383	4.8%	7,567	0.3%	18,702	4.7%	36,623	-0.7%
1992	73,089	1.1%	9,170	-2.3%	7,778	2.8%	19,290	3.1%	36,851	0.6%
1993	69,502	-4.9%	9,140	-0.3%	4,631	-40.5%	19,127	-0.8%	36,604	-0.7%
1994	70,463	1.4%	9,595	5.0%	5,870	26.8%	18,804	-1.7%	36,194	-1.1%
1995										
1996	70,288	-0.2%	9,558	-0.4%	6,760	15.2%	17,824	-5.2%	36,146	-0.1%
1997	71,025	1.0%	9,913	3.7%	6,589	-2.5%	18,552	4.1%	35,971	-0.5%
1998	71,480	0.6%	9,655	-2.6%	6,969	5.8%	18,650	0.5%	36,206	0.7%
1999	71,157	-0.5%	9,815	1.7%	6,872	-1.4%	18,609	-0.2%	35,861	-1.0%
2000	71,506	0.5%	9,774	-0.4%	7,159	4.2%	18,270	-1.8%	36,303	1.2%
2001	72,204	1.0%	9,944	1.7%	7,202	0.6%	18,234	-0.2%	36,824	1.4%
2002	70,783	-2.0%	9,297	-6.5%	7,037	-2.3%	17,992	-1.3%	36,457	-1.0%
2003	70,579	-0.3%	9,478	1.9%	7,257	3.1%	18,303	1.7%	35,541	-2.5%
2004	72,176	2.3%	9,857	4.0%	8,105	11.7%	18,445	0.8%	35,769	0.6%
2005	72,307	0.2%	10,940	11.0%	8,221	1.4%	19,220	4.2%	33,926	-5.2%
2006	72,274	0.0%	10,831	-1.0%	8,266	0.5%	19,571	1.8%	33,606	-0.9%
2007	73,220	1.3%	11,061	2.1%	8,692	5.2%	19,879	1.6%	33,588	-0.1%
2008	74,177	1.3%	11,240	1.6%	9,203	5.9%	19,653	-1.1%	34,081	1.5%
2009	75,198	1.4%	11,541	2.7%	9,469	2.9%	20,161	2.6%	34,027	-0.2%
2010	74,988	-0.3%	11,479	-0.5%	9,344	-1.3%	20,383	1.1%	33,782	-0.7%
2011	77,731	3.7%	11,113	-3.2%	9,872	5.7%	21,745	6.7%	35,001	3.6%
2012	74,650	-4.0%	10,594	-4.7%	8,289	-16.0%	20,441	-6.0%	35,326	0.9%
2013	73,959	-0.9%	10,903	2.9%	8,675	4.7%	18,691	-8.6%	35,690	1.0%
2014	73,716	-0.3%	10,666	-2.2%	8,492	-2.1%	18,694	0.0%	35,864	0.5%
2015	77,138	4.6%	11,085	3.9%	8,582	1.1%	21,413	14.5%	36,058	0.5%
2016	79,092	2.5%	11,349	2.4%	8,444	-1.6%	21,899	2.3%	37,400	3.7%
2017	80,336	1.6%	11,284	-0.6%	8,821	4.5%	21,723	-0.8%	38,508	3.0%

³ Hawai'i Visitors and Convention Bureau did not conduct a survey in 1995.

Table 2: Inventory by Island and Property Type

ISLAND	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
HAWAI'I ISLAND	Apartment/ Hotel	2	2	0
	Bed & Breakfast	59	65	-6
	Condominium Hotel	13	15	-2
	Hostel	3	3	0
	Hotel	31	32	-1
	Vacation Rental Unit	348	343	5
	Timeshare	15	17	-2
	Other	9	11	-2
	Total	480	488	-8
KAUAI	Apartment/ Hotel	0	0	0
	Bed & Breakfast	8	11	-3
	Condominium Hotel	21	21	0
	Hostel	0	0	0
	Hotel	15	14	1
	Vacation Rental Unit	303	290	13
	Timeshare	19	19	0
	Other	3	3	0
	Total	369	358	11
MAUI	Apartment/ Hotel	0	0	0
	Bed & Breakfast	42	46	-4
	Condominium Hotel	52	52	0
	Hostel	3	3	0
	Hotel	34	35	-1
	Vacation Rental Unit	323	376	-53
	Timeshare	22	22	0
	Other	2	2	0
	Total	478	536	-58
MOLOKA'I	Apartment/ Hotel	0	0	0
	Bed & Breakfast	1	1	0
	Condominium Hotel	2	2	0
	Hostel	0	0	0
	Hotel	0	0	0
	Vacation Rental Unit	19	14	5
	Timeshare	1	1	0
	Other	0	0	0
	Total	23	18	5
LĀNA'I	Apartment/ Hotel	0	0	0
	Bed & Breakfast	0	0	0
	Condominium Hotel	0	0	0
	Hostel	0	0	0
	Hotel	2	2	0
	Vacation Rental Unit	2	2	0
	Timeshare	0	0	0
	Other	0	0	0
	Total	4	4	0

Table 2: Inventory by Island and Property Type Continued

ISLAND	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
O'AHU	Apartment/ Hotel	2	2	0
	Bed & Breakfast	24	26	-2
	Condominium Hotel	30	27	3
	Hostel	6	6	0
	Hotel	71	70	1
	Vacation Rental Unit	128	156	-28
	Timeshare	16	17	-1
	Other	4	4	0
	Total	281	308	-27
STATEWIDE	Apartment/ Hotel	4	4	0
	Bed & Breakfast	134	149	-15
	Condominium Hotel	118	117	1
	Hostel	12	12	0
	Hotel	153	153	0
	Vacation Rental Unit	1,123	1,181	-58
	Timeshare	73	76	-3
	Other	18	20	-2
	State Total	1,635	1,712	-77

Table 3: Inventory by Island and Unit Type

ISLAND	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
HAWAII ISLAND	Apartment/ Hotel	36	36	0
	Bed & Breakfast	262	269	-7
	Condominium Hotel	499	613	-114
	Hostel	24	24	0
	Hotel	6,512	6,614	-102
	Vacation Rental Unit	2,037	1,943	94
	Timeshare	1,801	1,728	73
	Other	113	122	-9
	Total	11,284	11,349	-65
KAUAI	Apartment/ Hotel	0	0	0
	Bed & Breakfast	29	52	-23
	Condominium Hotel	1,657	1,536	121
	Hostel	0	0	0
	Hotel	2,851	2,654	197
	Vacation Rental Unit	1,710	1,546	164
	Timeshare	2,546	2,628	-82
	Other	28	28	0
	Total	8,821	8,444	377
MAUI	Apartment/ Hotel	15	15	0
	Bed & Breakfast	168	187	-19
	Condominium Hotel	4,402	4,317	85
	Hostel	48	48	0
	Hotel	7,742	8,245	-503
	Vacation Rental Unit	5,472	5,469	3
	Timeshare	3,379	3,160	219
	Other	24	24	0
	Total	21,250	21,465	-215
MOLOKAI	Apartment/ Hotel	0	0	0
	Bed & Breakfast	1	1	0
	Condominium Hotel	71	73	-2
	Hostel	0	0	0
	Hotel	0	0	0
	Vacation Rental Unit	165	101	64
	Timeshare	7	7	0
	Other	0	0	0
	Total	244	182	62
LANAI	Apartment/ Hotel	0	0	0
	Bed & Breakfast	0	0	0
	Condominium Hotel	0	0	0
	Hostel	0	0	0
	Hotel	224	247	-23
	Vacation Rental Unit	5	5	0
	Timeshare	0	0	0
	Other	0	0	0
	Total	229	252	-23

Table 3: Inventory by Island and Unit Type Continued

ISLAND	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
O'AHU	Apartment/ Hotel	50	48	2
	Bed & Breakfast	47	43	4
	Condominium Hotel	4,246	4,379	-133
	Hostel	239	235	4
	Hotel	27,102	26,152	950
	Vacation Rental Unit	3,270	3,125	145
	Timeshare	3,329	3,193	136
	Other	225	225	0
	Total	38,508	37,400	1,108
STATEWIDE	Apartment/ Hotel	101	99	2
	Bed & Breakfast	507	552	-45
	Condominium Hotel	10,875	10,918	-43
	Hostel	311	307	4
	Hotel	44,431	43,912	519
	Vacation Rental Unit	12,659	12,189	470
	Timeshare	11,062	10,716	346
	Other	390	399	-9
	State Total	80,336	79,092	1,244

Table 4: Inventory by Area and Property Type

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
HAWAI'I ISLAND	Hilo/Honoka'a	Apartment/ Hotel	1	1	0
		Bed & Breakfast	18	20	-2
		Condominium Hotel	1	1	0
		Hostel	0	0	0
		Hotel	8	8	0
		Vacation Rental Unit	89	80	9
		Timeshare	0	0	0
		Other	2	4	-2
		Total	119	114	5
	Kohala/Waimea/Kawaihae	Apartment/ Hotel	0	0	0
		Bed & Breakfast	5	6	-1
		Condominium Hotel	5	7	-2
		Hostel	0	0	0
		Hotel	10	10	0
		Vacation Rental Unit	61	78	-17
		Timeshare	5	4	1
		Other	2	2	0
		Total	88	107	-19
	Kona	Apartment/ Hotel	0	0	0
		Bed & Breakfast	20	22	-2
		Condominium Hotel	7	7	0
		Hostel	1	1	0
		Hotel	10	11	-1
		Vacation Rental Unit	180	168	12
		Timeshare	10	12	-2
		Other	1	1	0
		Total	229	222	7
	Nā'ālehu/Ka'ū	Apartment/ Hotel	0	0	0
		Bed & Breakfast	3	4	-1
		Condominium Hotel	0	0	0
		Hostel	1	1	0
		Hotel	0	0	0
		Vacation Rental Unit	2	2	0
		Timeshare	0	0	0
		Other	1	1	0
		Total	7	8	-1
	Volcano Area	Apartment/ Hotel	1	1	0
		Bed & Breakfast	13	13	0
		Condominium Hotel	0	0	0
		Hostel	1	1	0
		Hotel	3	3	0
		Vacation Rental Unit	16	15	1
		Timeshare	0	1	-1
		Other	3	3	0
		Total	37	37	0
HAWAI'I ISLAND TOTAL			480	488	-8

Table 4: Inventory by Area and Property Type Continued

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
KAUA'I	Kalāheo/Waimea	Apartment/ Hotel	0	0	0
		Bed & Breakfast	2	3	-1
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	1	1	0
		Vacation Rental Unit	14	14	0
		Timeshare	0	0	0
		Other	1	1	0
		Total	18	19	-1
		Līhu'e		Apartment/ Hotel	0
Bed & Breakfast	0			0	0
Condominium Hotel	3			2	1
Hostel	0			0	0
Hotel	5			5	0
Vacation Rental Unit	2			2	0
Timeshare	3			2	1
Other	1			1	0
Total	14			12	2
Po'ipū/Kukui'ula				Apartment/ Hotel	0
		Bed & Breakfast	2	3	-1
		Condominium Hotel	8	10	-2
		Hostel	0	0	0
		Hotel	4	3	1
		Vacation Rental Unit	108	102	6
		Timeshare	3	3	0
		Other	0	0	0
		Total	125	121	4
		Princeville/Hanalei		Apartment/ Hotel	0
Bed & Breakfast	2			2	0
Condominium Hotel	2			2	0
Hostel	0			0	0
Hotel	1			1	0
Vacation Rental Unit	161			153	8
Timeshare	9			9	0
Other	1			1	0
Total	176			168	8
Wailua/Kapa'a				Apartment/ Hotel	0
		Bed & Breakfast	2	3	-1
		Condominium Hotel	8	7	1
		Hostel	0	0	0
		Hotel	4	4	0
		Vacation Rental Unit	18	19	-1
		Timeshare	4	5	-1
		Other	0	0	0
		Total	36	38	-2
		KAUA'I TOTAL			369

Table 4: Inventory by Area and Property Type Continued

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
MAUI	Hāna Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	2	3	-1
		Condominium Hotel	1	1	0
		Hostel	0	0	0
		Hotel	1	1	0
		Vacation Rental Unit	6	6	0
		Timeshare	0	0	0
		Other	1	1	0
		Total	11	12	-1
	Kahului/Wailuku	Apartment/ Hotel	0	0	0
		Bed & Breakfast	5	5	0
		Condominium Hotel	0	0	0
		Hostel	3	3	0
		Hotel	5	5	0
		Vacation Rental Unit	4	4	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	17	17	0
	Kula/Makawao	Apartment/ Hotel	0	0	0
		Bed & Breakfast	14	15	-1
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	3	3	0
		Vacation Rental Unit	3	3	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	20	21	-1
	Lahaina/Kā'anapali/ Nāpili/Kapalua	Apartment/ Hotel	0	0	0
		Bed & Breakfast	7	9	-2
		Condominium Hotel	28	27	1
		Hostel	0	0	0
		Hotel	12	13	-1
		Vacation Rental Unit	109	117	-8
		Timeshare	14	13	1
		Other	1	1	0
		Total	171	180	-9
	Mā'alaea	Apartment/ Hotel	0	0	0
		Bed & Breakfast	1	1	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	0	0	0
		Vacation Rental Unit	5	4	1
		Timeshare	0	0	0
		Other	0	0	0
		Total	6	5	1

Table 4: Inventory by Area and Property Type Continued

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
	Wailea/Kihei Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	13	13	0
		Condominium Hotel	23	24	-1
		Hostel	0	0	0
		Hotel	13	13	0
		Vacation Rental Unit	196	242	-46
		Timeshare	8	9	-1
		Other	0	0	0
		Total	253	301	-48
		MAUI TOTAL	478	536	-58

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
MOLOKA'I		Apartment/ Hotel	0	0	0
		Bed & Breakfast	1	1	0
		Condominium Hotel	2	2	0
		Hostel	0	0	0
		Hotel	0	0	0
		Vacation Rental Unit	19	14	5
		Timeshare	1	1	0
		Other	0	0	0
		Total	23	18	5
MOLOKA'I TOTAL			23	18	5
LĀNA'I		Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	2	2	0
		Vacation Rental Unit	2	2	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	4	4	0
LĀNA'I TOTAL			4	4	0

Table 4: Inventory by Area and Property Type Continued

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
O'AHU	Airport Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	5	5	0
		Vacation Rental Unit	0	0	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	5	5	0
	Ala Moana Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	1	1	0
		Hostel	1	1	0
		Hotel	1	2	-1
		Vacation Rental Unit	2	2	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	5	6	-1
	Leeward/Mākaha Side	Apartment/ Hotel	1	1	0
		Bed & Breakfast	2	2	0
		Condominium Hotel	2	2	0
		Hostel	0	0	0
		Hotel	1	0	1
		Vacation Rental Unit	9	9	0
		Timeshare	3	3	0
		Other	0	0	0
		Total	18	17	1
	North Shore	Apartment/ Hotel	0	0	0
		Bed & Breakfast	1	1	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	3	3	0
		Vacation Rental Unit	33	31	2
		Timeshare	0	0	0
		Other	0	0	0
		Total	37	35	2
	Other Honolulu	Apartment/ Hotel	0	0	0
		Bed & Breakfast	1	1	0
		Condominium Hotel	1	1	0
		Hostel	1	1	0
		Hotel	2	2	0
		Vacation Rental Unit	3	3	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	8	8	0

Table 4: Inventory by Area and Property Type Continued

ISLAND	AREA	TYPE	2017 PROPERTIES	2016 PROPERTIES	CHANGE FROM 2016
	Waikīkī/Honolulu	Apartment/ Hotel	1	1	0
		Bed & Breakfast	3	3	0
		Condominium Hotel	26	23	3
		Hostel	4	4	0
		Hotel	57	56	1
		Vacation Rental Unit	62	96	-34
		Timeshare	13	14	-1
		Other	0	0	0
		Total	166	197	-31
	Windward Side	Apartment/ Hotel	0	0	0
		Bed & Breakfast	17	19	-2
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	2	2	0
		Vacation Rental Unit	19	15	4
		Timeshare	0	0	0
		Other	4	4	0
		Total	42	40	2
O'AHU TOTAL			281	308	-27

Table 5: Inventory by Area and Unit Type

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
HAWAI'I ISLAND	Hilo/Honoka'a	Apartment/ Hotel	24	24	0
		Bed & Breakfast	78	82	-4
		Condominium Hotel	50	50	0
		Hostel	16	16	0
		Hotel	1,070	1,056	14
		Vacation Rental Unit	101	90	11
		Timeshare	0	0	0
		Other	69	69	0
		Total	1,408	1,387	21
		Kohala/Waimea/Kawaihae	Apartment/ Hotel	0	0
Bed & Breakfast	46		47	-1	
Condominium Hotel	189		297	-108	
Hostel	0		0	0	
Hotel	3,242		3,342	-100	
Vacation Rental Unit	647		743	-96	
Timeshare	885		766	119	
Other	6		15	-9	
Total	5,015		5,210	-195	
Kona	Apartment/ Hotel		0	0	0
	Bed & Breakfast	79	82	-3	
	Condominium Hotel	260	266	-6	
	Hostel	1	1	0	
	Hotel	2,061	2,077	-16	
	Vacation Rental Unit	1,171	1,017	154	
	Timeshare	916	938	-22	
	Other	6	6	0	
	Total	4,494	4,387	107	
	Nā'ālehu/Ka'ū	Apartment/ Hotel	0	0	0
Bed & Breakfast		9	13	-4	
Condominium Hotel		0	0	0	
Hostel		1	1	0	
Hotel		0	0	0	
Vacation Rental Unit		2	2	0	
Timeshare		0	0	0	
Other		5	5	0	
Total		17	21	-4	
Volcano Area		Apartment/ Hotel	12	12	0
	Bed & Breakfast	50	45	5	
	Condominium Hotel	0	0	0	
	Hostel	6	6	0	
	Hotel	139	139	0	
	Vacation Rental Unit	116	91	25	
	Timeshare	0	24	-24	
	Other	27	27	0	
	Total	350	344	6	
	HAWAI'I TOTAL			11,284	11,349

Table 5: Inventory by Area and Unit Type Continued

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
KAUA'I	Kalāheo/Waimea	Apartment/ Hotel	0	0	0
		Bed & Breakfast	5	12	-7
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	60	60	0
		Vacation Rental Unit	71	71	0
		Timeshare	0	0	0
		Other	16	16	0
		Total	152	159	-7
		Līhu'e		Apartment/ Hotel	0
Bed & Breakfast	0			0	0
Condominium Hotel	391			349	42
Hostel	0			0	0
Hotel	482			482	0
Vacation Rental Unit	66			65	1
Timeshare	573			573	0
Other	8			8	0
Total	1,520			1,477	43
Po'ipū/Kukui'ula				Apartment/ Hotel	0
		Bed & Breakfast	12	24	-12
		Condominium Hotel	652	768	-116
		Hostel	0	0	0
		Hotel	1,427	1,114	313
		Vacation Rental Unit	844	581	263
		Timeshare	606	628	-22
		Other	0	0	0
		Total	3,541	3,115	426
		Princeville/Hanalei		Apartment/ Hotel	0
Bed & Breakfast	5			5	0
Condominium Hotel	63			63	0
Hostel	0			0	0
Hotel	251			251	0
Vacation Rental Unit	534			501	33
Timeshare	904			918	-14
Other	4			4	0
Total	1,761			1,742	19
Wailua/Kapa'a				Apartment/ Hotel	0
		Bed & Breakfast	7	11	-4
		Condominium Hotel	551	356	195
		Hostel	0	0	0
		Hotel	631	747	-116
		Vacation Rental Unit	195	328	-133
		Timeshare	463	509	-46
		Other	0	0	0
		Total	1,847	1,951	-104
		KAUA'I TOTAL			8,821

Table 5: Inventory by Area and Unit Type Continued

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
MAUI	Hāna Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	5	8	-3
		Condominium Hotel	17	18	-1
		Hostel	0	0	0
		Hotel	71	71	0
		Vacation Rental Unit	22	20	2
		Timeshare	0	0	0
		Other	4	4	0
		Total	119	121	-2
	Kahului/Wailuku	Apartment/ Hotel	15	15	0
		Bed & Breakfast	27	27	0
		Condominium Hotel	0	0	0
		Hostel	48	48	0
		Hotel	494	494	0
		Vacation Rental Unit	16	16	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	600	600	0
	Kula/Makawao	Apartment/ Hotel	0	0	0
		Bed & Breakfast	48	54	-6
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	38	39	-1
		Vacation Rental Unit	14	14	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	100	107	-7
	Lahaina/Kā'anapali/ Nāpili/Kapalua	Apartment/ Hotel	0	0	0
		Bed & Breakfast	43	52	-9
		Condominium Hotel	2,713	2,689	24
		Hostel	0	0	0
		Hotel	3,550	4,049	-499
		Vacation Rental Unit	2,329	2,192	137
		Timeshare	2,828	2,626	202
		Other	20	20	0
		Total	11,483	11,628	-145
	Mā'alaea	Apartment/ Hotel	0	0	0
		Bed & Breakfast	4	4	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	0	0	0
		Vacation Rental Unit	244	219	25
		Timeshare	0	0	0
		Other	0	0	0
		Total	248	223	25

Table 5: Inventory by Area and Unit Type Continued

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
	Wailea/Kihei Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	41	42	-1
		Condominium Hotel	1,672	1,610	62
		Hostel	0	0	0
		Hotel	3,589	3,592	-3
		Vacation Rental Unit	2,847	3,008	-161
		Timeshare	551	534	17
		Other	0	0	0
		Total	8,700	8,786	-86
	MAUI TOTAL		21,250	21,465	-215

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
MOLOKA'I		Apartment/ Hotel	0	0	0
		Bed & Breakfast	1	1	0
		Condominium Hotel	71	73	-2
		Hostel	0	0	0
		Hotel	0	0	0
		Vacation Rental Unit	165	101	64
		Timeshare	7	7	0
		Other	0	0	0
		Total	244	182	62
MOLOKA'I TOTAL			244	182	62
LĀNA'I		Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	224	247	-23
		Vacation Rental Unit	5	5	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	229	252	-23
LĀNA'I TOTAL			229	252	-23

Table 5: Inventory by Area and Unit Type Continued

ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	CHANGE FROM 2016
O'AHU	Airport Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	1,285	1,286	-1
		Vacation Rental Unit	0	0	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	1,285	1,286	-1
	Ala Moana Area	Apartment/ Hotel	0	0	0
		Bed & Breakfast	0	0	0
		Condominium Hotel	1,044	1,171	-127
		Hostel	26	26	0
		Hotel	199	313	-114
		Vacation Rental Unit	134	2	132
		Timeshare	0	0	0
		Other	0	0	0
		Total	1,403	1,512	-109
	Leeward/Māhaka Side	Apartment/ Hotel	30	30	0
		Bed & Breakfast	2	2	0
		Condominium Hotel	206	206	0
		Hostel	0	0	0
		Hotel	534	359	175
		Vacation Rental Unit	473	312	161
		Timeshare	1,431	1,431	0
		Other	43	43	0
		Total	2,719	2,383	336
	North Shore	Apartment/ Hotel	2	0	2
		Bed & Breakfast	0	0	0
		Condominium Hotel	0	0	0
		Hostel	4	0	4
		Hotel	788	788	0
		Vacation Rental Unit	398	386	12
		Timeshare	0	0	0
		Other	0	0	0
		Total	1,192	1,174	18
	Other Honolulu	Apartment/ Hotel	0	0	0
		Bed & Breakfast	7	0	7
		Condominium Hotel	113	106	7
		Hostel	40	40	0
		Hotel	436	436	0
		Vacation Rental Unit	4	4	0
		Timeshare	0	0	0
		Other	0	0	0
		Total	600	586	14

Table 5: Inventory by Area and Unit Type Continued

CHANGE FROM					
ISLAND	AREA	TYPE	2017 UNITS	2016 UNITS	2016
	Waikīkī/Honolulu	Apartment/ Hotel	18	18	0
		Bed & Breakfast	7	7	0
		Condominium Hotel	2,883	2,896	-13
		Hostel	169	169	0
		Hotel	23,697	22,828	869
		Vacation Rental Unit	2,117	2,301	-184
		Timeshare	1,898	1,762	136
		Other	0	0	0
		Total	30,789	29,981	808
	Windward Side	Apartment/ Hotel	0	0	0
		Bed & Breakfast	31	34	-3
		Condominium Hotel	0	0	0
		Hostel	0	0	0
		Hotel	163	142	21
		Vacation Rental Unit	144	120	24
		Timeshare	0	0	0
		Other	182	182	0
		Total	520	478	42
O'AHU TOTAL		38,508	37,400	1,108	

Table 6: Class of Units by Island

ISLAND	CLASS	Percent of Total Units ⁴		Percentage Point Change from 2016
		2017 ⁵	2016 ⁶	
HAWAII ISLAND	Budget (Up to \$100)	9.4%	8.9%	0.5%
	Standard (\$101 to \$250)	21.8%	27.0%	-5.2%
	Deluxe (\$251 to \$500)	41.0%	43.5%	-2.5%
	Luxury (Over \$500/Night)	27.9%	20.6%	7.3%
	Total	100.0%	100.0%	
KAUAI	Budget (Up to \$100)	2.1%	2.1%	0.0%
	Standard (\$101 to \$250)	31.7%	31.8%	-0.1%
	Deluxe (\$251 to \$500)	29.5%	29.7%	-0.2%
	Luxury (Over \$500/Night)	36.7%	36.4%	0.3%
	Total	100.0%	100.0%	
MAUI	Budget (Up to \$100)	1.5%	1.6%	-0.1%
	Standard (\$101 to \$250)	19.1%	18.7%	0.4%
	Deluxe (\$251 to \$500)	24.9%	23.4%	1.5%
	Luxury (Over \$500/Night)	54.5%	56.3%	-1.8%
	Total	100.0%	100.0%	
MOLOKAI	Budget (Up to \$100)	42.9%	6.7%	36.2%
	Standard (\$101 to \$250)	57.1%	88.9%	-31.8%
	Deluxe (\$251 to \$500)	0.0%	4.4%	-4.4%
	Luxury (Over \$500/Night)	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	
LANAI	Budget (Up to \$100)	0.0%	0.0%	0.0%
	Standard (\$101 to \$250)	6.6%	4.5%	2.1%
	Deluxe (\$251 to \$500)	0.0%	26.3%	-26.3%
	Luxury (Over \$500/Night)	93.4%	69.2%	24.2%
	Total	100.0%	100.0%	
OAHU	Budget (Up to \$100)	2.6%	2.8%	-0.2%
	Standard (\$101 to \$250)	27.7%	28.6%	-0.9%
	Deluxe (\$251 to \$500)	40.1%	39.2%	0.9%
	Luxury (Over \$500/Night)	29.6%	29.4%	0.2%
	Total	100.0%	100.0%	
STATEWIDE	Budget (Up to \$100)	3.4%	3.5%	-0.1%
	Standard (\$101 to \$250)	25.1%	26.4%	-1.3%
	Deluxe (\$251 to \$500)	35.8%	35.4%	0.4%
	Luxury (Over \$500/Night)	35.7%	34.6%	1.1%
	Total	100.0%	100.0%	

⁴ Totals may not sum to 100% due to rounding.

⁵ Based on 47,233 units (58.8 percent of the total units in 2017) for which information on the class of units was available.

⁶ Based on 46,524 units (58.8 percent of the total units in 2016) for which information on the class of units was available.

Table 7: Class of Units by Type

ISLAND	CLASS	Percent of Total Units ⁷		Percentage Point change from 2016
		2017 ⁸	2016 ⁹	
Apartment/ Hotel	Budget (Up to \$100)	34.0%	34.0%	0.0%
	Standard (\$101 to \$250)	61.7%	61.7%	0.0%
	Deluxe (\$251 to \$500)	4.3%	4.3%	0.0%
	Luxury (Over \$500/Night)	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	
Bed & Breakfast	Budget (Up to \$100)	18.1%	22.1%	-4.1%
	Standard (\$101 to \$250)	73.4%	67.9%	5.4%
	Deluxe (\$251 to \$500)	8.1%	9.6%	-1.4%
	Luxury (Over \$500/Night)	0.5%	0.4%	0.1%
	Total	100.0%	100.0%	
Condominium Hotel	Budget (Up to \$100)	2.3%	2.2%	0.1%
	Standard (\$101 to \$250)	38.6%	49.4%	-10.8%
	Deluxe (\$251 to \$500)	42.8%	33.1%	9.7%
	Luxury (Over \$500/Night)	16.3%	15.3%	1.0%
	Total	100.0%	100.0%	
Hostel	Budget (Up to \$100)	94.9%	94.9%	0.0%
	Standard (\$101 to \$250)	5.1%	5.1%	0.0%
	Deluxe (\$251 to \$500)	0.0%	0.0%	0.0%
	Luxury (Over \$500/Night)	0.0%	0.0%	0.0%
	Total	100.0%	100.0%	
Hotel	Budget (Up to \$100)	2.2%	2.3%	-0.1%
	Standard (\$101 to \$250)	18.9%	19.0%	0.0%
	Deluxe (\$251 to \$500)	39.5%	38.7%	0.8%
	Luxury (Over \$500/Night)	39.4%	40.1%	-0.7%
	Total	100.0%	100.0%	
Vacation Rental Unit	Budget (Up to \$100)	16.9%	12.1%	4.9%
	Standard (\$101 to \$250)	49.1%	45.2%	3.9%
	Deluxe (\$251 to \$500)	19.1%	26.1%	-7.0%
	Luxury (Over \$500/Night)	14.8%	16.6%	-1.8%
	Total	100.0%	100.0%	
Timeshare	Budget (Up to \$100)	1.3%	1.6%	-0.3%
	Standard (\$101 to \$250)	26.6%	34.5%	-7.9%
	Deluxe (\$251 to \$500)	8.3%	24.2%	-16.0%
	Luxury (Over \$500/Night)	63.8%	39.6%	24.2%
	Total	100.0%	100.0%	

⁷ Totals may not sum to 100% due to rounding.

⁸ Based on 47,233 units (58.8 percent of the total units in 2017) for which information on the class of units was available.

⁹ Based on 46,524 units (58.8 percent of the total units in 2016) for which information on the class of units was available.

Table 7: Class of Units by Type Continued

ISLAND	CLASS	Percent of Total Units		Percentage Point change from 2016
		2017	2016	
Other	Budget (Up to \$100)	40.9%	40.8%	0.0%
	Standard (\$101 to \$250)	53.3%	53.5%	-0.2%
	Deluxe (\$251 to \$500)	3.6%	3.5%	0.1%
	Luxury (Over \$500/Night)	2.2%	2.1%	0.1%
	Total	100.0%	100.0%	
STATEWIDE	Budget (Up to \$100)	3.4%	3.5%	-0.1%
	Standard (\$101 to \$250)	24.0%	26.4%	-2.4%
	Deluxe (\$251 to \$500)	35.4%	35.5%	0.0%
	Luxury (Over \$500/Night)	37.2%	34.6%	2.5%
	Total	100.0%	100.0%	

Table 8: Timeshare Properties by Island and Area

		2017		2016		CHANGE FROM 2016	
Area	Property	Reg.	Oper.	Reg.	Oper.	Reg.	Oper.
HAWAI'I ISLAND							
Kohala/Waimea /Kawaihae	Hilton Bay Club at Waikoloa Beach	167	159	167	159	0	0
	King's Land by Hilton Grand Vacations	435	332	435	332	0	0
Kona	Hilton Waikoloa Village	120	113	120	113	0	0
	Marriott's Waikoloa Ocean Club	112	112				
	Paniolo Greens Resort	162	162	162	162	0	0
	Holua Resort at Mauna Loa Village	73	73	73	73	0	0
	Kona Billfisher	65	65	65	65	0	0
	Kona Coast Resort	268	268	268	268	0	0
	Kona Islander Inn	85	85	85	85	0	0
	Kona Reef	24	24	24	24	0	0
	Royal Aloha Kona at Keauhou Kona Surf & Racquet Club	16	16	16	16	0	0
	Vacation Internationale - Sea Village	58	58	58	58	0	0
	WorldMark at Kona	64	64	64	64	0	0
	Wyndham Kona Hawaiian Resort	158	156	158	156	0	0
	Wyndham Mauna Loa Village	53	53	53	53	0	0
	Wyndham Royal Sea Cliff	76	76	76	76	0	0
	Volcano Area	Vacation Internationale - Sea Mountain	24	24	24	24	0
Total		1,960	1,840	1,848	1,728	0	0
KAUA'I							
Līhu'e	Banyan Harbor Resort	37	37	37	37	0	0
	Marriott's Kaua'i Beach Club	232	464	232	464	0	0
	Marriott's Kaua'i Lagoons	72	72	72	72	0	0
	Wyndham Kaua'i Beach Villas	105	105	105	105	0	0
Po'ipū/Kukui'ula	Lawai Beach Resort	172	172	172	172	0	0
	Nihi Kai Villas	3	3	3	3	0	0
	Marriott's Waiohai Beach Club	234	234	234	234	0	0
	The Point at Poipu	219	219	219	219	0	0
Princeville/	Alii Kai II	24	24	24	24	0	0
	Cliffs At Princeville, The	129	129	129	129	0	0
	Hanalei Bay Resort	134	134	154	154	-20	-20
	Westin Princeville Ocean Resort Villas	179	179	179	179	0	0
	Wyndham Bali Hai Villas	257	257	257	257	0	0
	Wyndham Ka Eo Kai	86	86	86	86	0	0
	Wyndham Makai Club	57	57	57	57	0	0
	Wyndham Shearwater	32	32	32	32	0	0
Wailua/Kapa'a	Kaua'i Coast Resort at the Beachboy	108	108	108	108	0	0
	Mokihana of Kaua'i	0	0	80	80	-80	-80
	Pono Kai Resort	201	201	167	167	34	34
	WorldMark Kapaa Shore	49	49	49	49	0	0
Total		2,330	2,562	2,396	2,628	-66	-66

Table 8: Timeshare Properties by Island and Area Continued

Area	Property	2017		2016		CHANGE FROM 2016	
		Reg.	Oper.	Reg.	Oper.	Reg.	Oper.
MAUI							
Lahaina/Kā'anapali/ Nāpili/Kapalua	Gardens at West Maui, The	34	34	34	34	0	0
	Hyatt Ka'anapali Beach, A Hyatt Residence Club	131	131	131	131	0	0
	Hololani Resort	9	9	9	9	0	0
	Hono Koa Resort Condominium	28	28	28	28	0	0
	Kaanapali Beach Club	413	413	413	413	0	0
	Kahana Beach Resort	84	84	84	84	0	0
	Kahana Falls Resorts	130	130	130	130	0	0
	Kahana Villa Maui	39	39	39	39	0	0
	Marriott's Maui Ocean Club	311	311	311	311	0	0
	Marriott's Maui Ocean Club Sequel-Lahaina & Napili Villas	148	148	148	148	0	0
	One Napili Way	14	14	14	14	0	0
	Papakea Resort	37	37	37	37	0	0
	Sands of Kahana, The	144	144	144	144	0	0
	Valley Isle Resort	21	21	21	21	0	0
	Westin Kaanapali Ocean Resort Villas	1021	1021	1021	1021	0	0
	Westin Nanea Ocean Villas, Kaanapali	195	195	0	0	195	195
	Whaler on Kaanapali Beach, The	50	50	48	48	2	2
	WorldMark at Valley Isle	14	14	14	14	0	0
	Wailea/Kīhei Area	Aston Maui Lea at Maui Hill Resort	76	76	76	76	0
Kamaole Beach Club		31	31	31	31	0	0
Kapulanikai		12	12	12	12	0	0
Kauhale Makai, Village By The Sea (Royal Aloha Maui)		12	12	12	12	0	0
Kihei Kai Nani		6	6	6	6	0	0
Leilani Kai Resort		8	8	8	8	0	0
Maui Banyan Vacation Club		19	19	19	19	0	0
Maui Beach Vacation Club		47	47	47	47	0	0
Maui Schooner Resort		58	58	58	58	0	0
Maui Sunset		65	65	65	65	0	0
WorldMark at Kihei		200	200	200	200	0	0
Total		3,357	3,357	3,160	3,160	197	197
Moloka'i							
Ke Nani Kai	7	7	7	7	0	0	
Total		7	7	7	7	0	0

Table 8: Timeshare Properties by Island and Area Continued

		2017		2016		CHANGE FROM 2016	
Area	Property	Reg.	Oper.	Reg.	Oper.	Reg.	Oper.
O'AHU							
Leeward/Mākah a	Aulani, A Disney Resort & Spa	481	481	481	481	0	0
	Hawaiian Princess at Makaha Beach	32	32	32	32	0	0
	Marriott's Ko Olina Beach Club	918	918	918	918	0	0
Waikīkī/Honolulu	Fairway Villa	19	19	19	19	0	0
	Hilton Hawaiian Village Grand Waikikian	331	307	331	308	0	-1
	Hilton Hawaiian Village Kalia Tower	72	68	72	69	0	-1
	Hilton Hawaiian Village Lagoon Tower	236	221	236	223	0	-2
	Hokulani Waikiki by Hilton Grand Vacations Club	143	124	140	140	3	-16
	The Grand Islander by Hilton Grand Vacations Club	418	166	0	0	418	166
	Waikiki Marina Resort at the Ilikai	123	123	123	123	0	0
	Imperial Hawaii Resort at Waikiki, The	262	232	262	232	0	0
	Kuhio Banyan Hotel	61	61	61	61	0	0
	Royal Aloha Vacation Club Aloha Towers	40	40	40	40	0	0
	Royal Aloha Vacation Club Waikiki Sky Tower	10	10	10	10	0	0
	Royal Kuhio Condominium	153	153	153	153	0	0
	Waikiki Banyan	49	49	49	49	0	0
	Wyndham at Royal Garden	140	140	140	140	0	0
	Wyndham at Waikiki Beach Walk	195	195	195	195	0	0
		Total	3,683	3,339	3,262	3,193	421
	State Total	11,337	11,105	10,673	10,716	552	277

Table 9: Planned Additions and New Developments – County of Hawai‘i

Name of Applicant	Planned Type	Total Units in Project	Estimated Completion	Notes
R Kevin Stafford	B&B	4	N/A	Special Purpose Permit (SPP) Approved. Puna district.
Kona Castle Ranch	B&B	5	N/A	Special Purpose Permit (SPP) Approved. North Kona district.
James Stapleton and James Ricciuti	B&B	5	N/A	Special Purpose Permit (SPP) Approved. Puna district.
Yuri Matsuoka	B&B	5	N/A	Special Purpose Permit (SPP) Approved. South Hilo district.
Clemens Classon	B&B	4	N/A	Special Purpose Permit (SPP) Approved. South Kona district.
Theresa Sommer	B&B	3	N/A	Special Purpose Permit (SPP) Approved. Puna district.
Mark Frost	B&B	5	N/A	Special Purpose Permit (SPP) Approved. Puna district.
Bruce W. and Margaret A. Campbell	B&B	1	N/A	Special Purpose Permit (SPP) Withdrawn by applicant. North Kona district.
Dianne Maritt	B&B	4	N/A	Special Purpose Permit (SPP) Revoked by applicant. South Hilo district.
Greenwillmind, LLC	B&B	2	N/A	USE - Approved. South Hilo district.
Jan Valdez	B&B	2	N/A	USE - Denied. South Hilo district.
Hale Ohu Bed & Breakfast LLC	B&B	From 6-room inn to 5-room B&B	N/A	Special Purpose Permit (SPP) Approved. Puna district.

Source: County of Hawai‘i Planning Department, 2017

Table 10: Planned Additions and New Developments – County of Kauaʻi

Name of Facility	Planned Type	Total Units in Project	Estimated Completion	Notes
Coco Palms	Hotel	350	N/A	Zoning permit granted March 2015
Kapalawai- Robinson Family	Hotel-Cottage type	250	N/A	Zoning permits obtained. Building permits not obtained yet.
Kukuiʻula-Kukuiʻula Development Co. (Hawaiʻi), LLC	Resort, Single Family, Multi-Family, Golf course, Hotel, Condo/Timeshare	1,500 (all types) (max of 750 visitor units, plus 21 guest cottages)	N/A	N/A
Poʻipū Realty Partner LLC/Royal Palms at Poʻipū Beach	Resort Condo	164	N/A	Zoning permits obtained. Building permits not obtained yet.
Kiahuna Fairways, LLC/Pili Mai at Poʻipū	Resort Condo	191	N/A	Some construction completed and units for sale.
Kiahuna Poʻipū Golf Resort LLC	Resort Condo	282	N/A	Zoning permits obtained. Building permits not obtained yet.
Poʻipū Beach Estates	Res. Subdivision	106	N/A	Residential Subdivision in the VDA. Approximately 50% built out.
Poʻipū Sheraton Expansion/SVO Pacific Inc.	Timeshare	382 Multi-family units & 186 Hotel	N/A	Land permits issued. Building permits not applied for yet.
Hokuala/ Timbers Resort	Hotel, Resort Single Family, Resort Multi-Family	772	N/A	Formerly "Kauaʻi Lagoons". 72 units in operation.
Coconut Beach Development	Apartment/Hotel	343 Multi-Family, 6 Hotel	N/A	Land use permits issued. Building permits not applied for yet.
Coconut Plantation Development	Apartment/Hotel	192 Multi-Family, 6 Hotel	N/A	Land use permits issued. Building permits not applied for yet.
Princeville-Moody property	Hotel or Timeshare	N/A	N/A	There have been inquiries on this property, no formal permit applications.
Hotel Coral Reef	Hotel Apartment Hotel	+4 +2	N/A	Received zoning permit to add 6 visitor units to the existing hotel (4 hotel units, 2 apartment-hotel units)

Source: County of Kauaʻi Planning Department, 2017

Table 11: Planned Additions and New Developments – County of Maui

Name of Facility	Planned Type	Total Units in Project	Estimated Completion	Notes
Maui Palms Expansion	Hotel	101	N/A	SMA permit issued. Permit transferred to new owner in 2014. Project in Review
Maui Lu Timeshare	Timeshare	388	2019	Amended SMA to delete lock off units. SMA permit transferred in 2014. Demolition complete, construction pending
Kamaole Grand	Condo	217	N/A	SMA permit approved. Construction pending.
Kamaole Heights	Hotel/Condo	24	N/A	Project in review.
Kula Lodge	Hotel	15	N/A	Project Pending. Awaiting Phase III Project District Approval
Honua'ula a.k.a Wailea 670	Mixed Use	1150	N/A	Pending LUC amendment. Completed Phase II Project District Approval. Requires Phase III Project District approval
Westin Kā'anapali Ocean Resort III	Timeshare	390	N/A	SMA permit issued. Construction pending
Kapalua Project District 2-Kapalua Mauka	Mixed Use	690	N/A	Project District permits issued. Project pending.
South Maui Gardens	Mixed Use	9	N/A	Reported in Maui News that mau be pulling project. Recommended for approval by MPC. Pending Council Approval of Change in Zoning, Conditional Permit, and SMA approval.
Villas at Royal Lahaina	Condo/Hotel	126	N/A	SMA permit issued. Construction pending.
Piilani Suites	Hotel	200	2017	Construction completed.
Maui Research and Technology Park	Mixed Use/Hotel	150	N/A	County Council approved.
Down Town Kihei	Mixed Use/Hotel	150	2018	CIZ & SMA approved. Construction pending.
Wada Commercial Building & Hotel	Mixed Use/Hotel	8	N/A	Project in review.
Makena Resort M-5, M-6, S-7, B-2				SMA approved. Construction pending.
Bed & Breakfast (individually owned homes with guest bedrooms operating throughout the county)	B&B	Establishments w/ approved permits 125	N/A	Projects in review-11
Short-term rentals homes (single-family dwellings for rent in their entirety for a period of less than 180 days, operating throughout the county)	New class accommodations	Establishments w/approved STRH permits 207	N/A	Projects in review-30
Transient vacation rentals (Establishments are processed under the Conditional Permit requirements and may be more varied types than B&B and STRH)		Establishments w/ approved STRH permits 12	N/A	Projects in review-0

Source: County of Maui Department of Planning, 2017

Table 12: Planned Additions and New Developments – City & County of Honolulu

Name Of Facility	Planned Type	Total Units In Project	Estimated Completion	Notes
KO OLINA RESORT				
Atlantis Resort Ko Olina	Hotel Condo Hotel	+800 +524	unknown	Announced in late 2016, Hawaii's first Atlantis Resort is expected to be developed on 26 acres in Ko Olina. In the early permitting process.
Four Seasons Resort O'ahu (renovation and expansion of the Ihilani Resort)	Hotel Condo Hotel	358 +150	reopened in May 2016 by 2020	The Ihilani hotel closed in January 2015, and after renovations reopened as the Four Seasons in May 2016. A planned second tower in the back will provide luxury resort condo residences.
Unnamed beachfront hotel next to the Marriott Beach Club	Hotel Condo Hotel	+400 +400	2019 or later 2019 or later	A two-tower hotel and resort condo project announced at the end of 2015; no permitting action yet
The rest of Ko Olina Resort	all types	unknown	no firm plans	Several inland sites are available for resort or residential use.
EWA BEACH				
Embassy Suites Kapolei (part of the Leihano mixed-use area)	Hotel	+180	Opened September 2017	Hotel opened after the May cut-off for inclusion in the 2017 Visitor Plant Inventory count. New rooms will be reflected in 2018.
Hoakalei Resort at Ocean Pointe	Hotel	Up to +950	unknown	Ocean Pointe/Hoakalei Resort now plans a lagoon instead of a marina, and this has delayed the project's future hotel plans.
Marriott Residence Inn	Hotel	+183	Construction scheduled to begin as soon as September 2017	Processing CUP Application (No. 2017/CUP-22), and decision due July 11, 2017. Public Hearing was held on May 26, 2017.
ALA MOANA AREA				
1500 Kapiolani	Hotel Condo Hotel	+444 +6 68 affordable units "air rights"	unknown	Processing an IPD-T Permit Application (No. 2017/SDD-24), and decision due July 30, 2017. Public hearing is scheduled for June 28, 2017.
Hawaii Ocean Plaza	Hotel Condo Hotel	+175 +216	unknown	Processing an IPD-T Permit (No. 2017/SDD-11). Transmitted the Director's Report to City Council on May 18, 2017.
Manalana Place Hotel (corner of Kapiolani & Atkinson Dr.)	Hotel Condo Hotel	+125 +109	unknown	Issued Major Special District Permit on May 16, 2017

Table 12: Planned Additions and New Developments – City & County of Honolulu Continued

Name Of Facility	Planned Type	Total Units In Project	Estimated Completion	Notes
WAIKIKI				
The Grand Islander at the Hilton Hawaiian Village	Timeshare	+418	Opened March 2017	A new 350-foot tower next to the Tapa Tower is u.c. on the site of the bus loading area, at Kalia Road and Paoa Place.
A second new timeshare tower at the Hilton Hawaiian Village	Timeshare	+255	2024 or later	This planned second tower will replace the existing Rainbow Bazaar, in the central core area next to the parking structure.
Ritz-Carlton Waikiki (two towers)	Condo Hotel Condo Hotel	+307 +246	completed July 2016 2018	A two-tower hotel behind Luxury Row at 2100 Kalakaua Ave. The first tower opened in July 2016; the second is underway.
Sheraton Princess Kaiulani partial demolition and replacement	Hotel Condo Hotel	-474 +210 +61	delayed	The 350' Ainalau Tower will remain; all else will be replaced by a 350' tower with 210 hotel condos and 61 resident condos.
Moana Surfrider – replacing the old Diamond Head wing	Hotel Condo Hotel	-141 +185	permit rescinded	The Hawaii Supreme Court rescinded the permit for this once-planned redevelopment of the west wing of the Moana Surfrider.
133 Kaiulani (behind the Hyatt Regency Waikiki)	Condo Hotel	+246	uncertain	A planned high-rise hotel has obtained its needed PD-R permit and will replace the King's Village shops and adjacent parcels.
King Kalakaua Plaza	Hotel	+230	2020 or later	Conversion and expansion of the old Nike Town store into a seven-story hotel.
Outrigger Reef Waikiki Beach Resort	Hotel	+39	2020 or later	Demolish pool deck and five-story Diamond Head Tower, and add a 150-foot, 17-story extension to the Pacific Tower.
RURAL AREAS				
Replacement of the Laie Inn by the Laie Marriott Courtyard, in two phases	Hotel Hotel	-49 +144 +78	demolished 2010 144 in 2015 unknown	The 49-unit Laie Inn was demolished, and the first phase of the new 144-room hotel was completed in 2015. 78 additional units are planned for a total of 222 units.
Turtle Bay Resort expansion	Hotel	625	unknown	Public agencies have purchased conservation easements and land, so this scaled-down resort expansion plan can proceed.
Makaha Resort demolition and replacement project	Hotel Hotel & Timeshare	-173 +300	demolished 2014 2019 or later	The old resort closed in 2011 and was demolished in 2014. The new owners have announced plans for up to 300 hotel and timeshare units, and have begun infrastructure planning.

Source: City and County of Honolulu, Department of Planning and Permitting, Planning Division, 2017

Table 13: Visitor Plant Inventory Reductions

Area	Property Name	Property Type	Total Units	Reason Closed/Out of Business
HAWAII				
HILO/HONOKA'A				
	The Butterfly Inn For Women	B&B	2	Closed.
	Holmes Sweet Home	B&B	2	No longer a B&B.
KOHALA/WAIMEA/KAWAIHAE				
	Hale Hoonanea Bed & Breakfast	B&B	1	Assumed Closed
NA'ALEHU/KA'U				
	Bougainvillea Bed And Breakfast	B&B	4	Permanently Closed
KONA				
	Nancy's Hideaway	B&B	2	No longer in business.
KAUAI				
KALAHEO/WAIMEA				
	Hale Ikena Nui	B&B	1	Closed.
WAILUA/KAPAA				
	Hale Lani B&B and Vacation Rentals	B&B	4	Long term rentals only.
MAUI				
HANA AREA				
	Windward Garden B&B	B&B	3	Closed.
KULA/MAKAWAO AREA				
	Haiku Cannery Inn	B&B	2	Closed
LAHAINA/KAANAPALI/NAPILI				
	Coconut Inn	Hotel	24	Long term use only
	Penny's Place	B&B	4	Permanently Closed
	House Of Fountains	B&B	5	Assumed Closed.
WAILEA/KIHEI AREA				
	Lihi Kai Cottages	Hotel	8	Closed in 2016
O'AHU				
WINDWARD SIDE				
	Alii Bluffs Windward Bed & Breakfast	B&B	2	Assumed Closed.
ALA MOANA AREA				
	Central YMCA	Hotel	114	Closed for re-development. Scheduled to re-open November 2017

2017 VISITOR PLANT INVENTORY: LIST OF PROPERTIES

The 2017 VPI property list is available online in a companion workbook. Notes for the list are shown below.

Explanation of Categories

- Island = Island on which the property is located
- Area = Area of the island where the property is located
- Name = Name of property
- Type = Unit Type
- Available Units = Number of units available for visitor use
- Change from 2016 = Difference in available units between 2017 and 2016 for entire property.
- Opened = Year property first opened

Class

- B Number of visitor units classified as Budget (Up to \$100 per night)
- S Number of visitor units classified as Standard (\$101 to \$250 per night)
- D Number of visitor units classified as Deluxe (\$251 to \$500 per night)
- L Number of visitor units classified as Luxury (Over \$500 per night)
- N/A Not available

Last Response

- 2017 Survey form received in 2017
- 2016 No response received in 2017, information received in 2016
- 2015 No response received in 2017, information received in 2015

Notes

- A – Visitor unit count estimated by AOUO/Resident Manager/Property Manager (for units managed by others)
- B – Visitor unit count estimated by Owner/Operator (for units owned/managed by others)
- C – Visitor unit count estimated by county real property tax departments
- D – Visitor unit count estimated by HTA
- E – Visitor unit count estimated based on prior survey response.
- F – The property's reporting method changed from 2016
- G – Selected units closed for renovation/reconstruction (balance of the property open for business)
- H – Units reopened after renovation/reconstruction
- I – Added units (new construction)
- J – Survey responses indicate additional units available for transient rental
- K – Survey responses indicate units no longer available for transient rental
- L – Survey responses indicate change in supply
- M – Visitor unit count is for beds, not rooms, for Hostel property

METHODS AND PROCEDURES: Visitor Plant Inventory

The 2017 Visitor Plant Inventory presents the results of HTA's enumeration of visitor accommodations in Hawai'i. Existing visitor accommodations as of May 1, 2017 as well as planned developments and additions to existing developments were catalogued.

Visitor Plant Inventory Survey: Information about transient accommodations was gathered mainly from a survey of existing visitor accommodation properties and management companies. Survey forms were sent to general managers, property managers and other individuals who could provide information about the property. The survey provided information about available units, planned additions and other information presented in this report.

Survey forms were distributed to all properties that participated in the prior year's survey and additional properties identified through the association survey (below) and internet research. Information for hotel and condominium hotel properties that participate in STR, Inc's monthly survey were also cross-verified against STR, Inc's property database.

Survey forms were distributed via mail, email, and fax. If no response was received, follow-up telephone calls, emails, and/or faxes were made to the property to remind them to complete and return the form. Subsequently, if no response was received after the follow-ups, an Internet search was conducted to determine if the property was still in business and telephone calls were made to verify unit counts and types. If no response was received or no data was found on the Internet, but information was available from prior years (2014, 2015 and 2016), that information was included and so noted. If no response was received from a property and information was available from the association survey, such information was included and so noted. If no survey form was returned and no information

was available from previous years or other sources, the property was listed as a non-respondent.

Association of Unit Owners Manager Survey: A survey of Association of Unit Owners ("AOUO") management companies for projects located in resort areas was conducted to gather information about transient rental units located within the project, especially VRU rental houses/villas and VR-condo units. AOUO managers were also asked to identify rental management companies associated with such visitor units and also IVU-condo units which are being marketed by owners, including participation in Visitor Rental By Owner ("VRBO"), Home Away, etc. programs. Any identified rental management companies that were not previously contacted were sent VPI survey forms. Data from this survey was also used to estimate VRU-condo units for a given project.

Contact information included in the State of Hawai'i Department of Commerce and Consumer Affairs' AOUO Contact List and Developer's Public Report/Association Biennial Registration database was used in the administration of this survey. Letters and survey forms were distributed via mail, email, and fax and follow-up telephone calls, emails, and/or faxes were also made.

Association Letter: Continued in 2017, this survey's purpose was to gather contact information of associations whose members were transient visitor accommodations in the State of Hawai'i. Letters were sent to these associations to request member accommodation contact information, from which the mailing list was updated and new accommodations were contacted via mailing as described above.

Timeshare Properties: Information on timeshare properties were gathered through the survey questionnaire, which asked for

information on the number of units registered as timeshare and units operated as timeshare. The number of units registered included those that were available for sale in a timeshare program (as well as those already sold in such a program). The number of units operated represented the units that were in use. Certain timeshare properties have the ability to split a given registered timeshare unit into more than one operated visitor unit (i.e. it may be possible for a two-bedroom unit to be rented as two keys: one studio unit and one 1-bedroom unit).

As of the 2009 VPI, the listing of timeshare inventory presented in Table 8 has been restated with registered units representing the number of units that were available to be sold as part of a timeshare program and operated units were defined as number of salable keys that were operated for visitor use. In some cases, the number of operating units exceed the number of registered units for a given timeshare property.

The available timeshare units listed in Tables 3 and 5 and their related charts were the total number of operated units. The number of timeshare properties listed in Tables 2 and 4 were the properties with the majority of units classified as timeshare. However, the number of available units listed with the timeshare category included those units that were cross-listed under the other property types. The 2017 Current Visitor Plant Inventory details the unit types available at each property.

Starting with the 2009 VPI, certain timeshare operators reported their inventory counts in terms of individual guest rooms (keys) rather than timeshare units previously reported. For example, a two-bedroom timeshare unit may, depending configuration, be rented separately as two guest rooms: a one-bedroom unit and as a studio unit. This change in reporting procedure resulted in a higher inventory count for certain timeshare properties, but did not necessarily reflect a change in the physical plant.

Cross Verification of Data: Responses from selected hotels, condominium hotels, and timeshare properties were cross verified against Smith Travel Research's property database and data from the American Resort Development Association.

Responses were also cross-verified against data received from the four counties, including real property classifications, bed and breakfast license data, and transient vacation unit (TVU) license data.

Unit Type Classification: Each unit reported in the survey was assigned a unit type based on HTA's type definitions [page 49]. For the purposes of classification, a given property may include more than one unit type. Historically, type classifications were self-selected by the respondent but research has shown that the response was not always consistent with HTA's type definitions. In such cases, the unit type was corrected for the 2017 VPI report.

Notably, many respondents classified their units as condominium hotel due to the units' location within a condominium building, but did not have the services or amenities included in HTA's definition for a condominium hotel. These units were reclassified as individual vacation units.

Property Type Classification: Classification of property type (Tables 2 & 4) for properties with more than one unit type was determined by the majority of units on that property. Historically property type was self-selected by the respondent but research has shown that the response was not always consistent with HTA's type definitions [page 49].

Planned New Developments: Information about planned new developments was gathered with assistance from the four county Planning Offices. The information was reprinted here and includes projects and developments that have achieved some level of jurisdictional approval. That was to say,

these developments were a step beyond the preliminary stages of development and have some “official” standing as planned developments.

DEFINITIONS

Type of Units

An individual property may include more than one type of unit. If a property has more than one unit type, the majority unit type was used to determine the property type for the purposes of this report. Units were categorized as follows:

Apartment / Hotel (Apt/Hotel): Visitor accommodations units typically located in low-rise apartment-style buildings and available for short-term rental. Units may have kitchens and laundry facilities. Front desk operations and housekeeping service are limited and sometimes non-existent.

Bed & Breakfast (B&B): A lodging facility with a limited number of guest units, available for short-term rental. Services include breakfast in the daily rental rate. Typical bed and breakfast facilities may be small, quaint inns or family homes.

Condominium Hotel (Condo Hotel): A multi-unit property legally classified as a condominium with each unit individually deeded. Generally, units are collectively placed into transient hotel rental operations, offering most of the services of a hotel, such as daily housekeeping service and front desk operations. Condominium hotel units are larger than hotel units and include studios and one- to three-bedroom units, with kitchen and laundry facilities, available for transient use on short-term rental basis (30 days or less).

Hotel: A multi-unit lodging facility that provides room accommodations on a short-term rental basis. Services often include a pool, restaurant operations, and other “away from home” services such as daily housekeeping service and front desk operations.

Hostels: An inexpensive, limited-service lodging facility, often with dormitory-style accommodations. They are available for short-

term rental and are frequently used by younger travelers.

Vacation Rental Unit (VRU): An individual vacation rental unit available for visitor use on a short-term basis (30 days or less). VRs usually include kitchens, laundry facilities, and parking garages. Services are very limited although some may include some housekeeping service.

- **Vacation Rental in a Condominium Hotel (VR-Condo):** A condominium hotel unit available for visitor use on a short-term basis. VR-Condos are not rented or managed by the condominium hotel management, but are available through individual owners, property managers, or Internet agencies.
- **Vacation Rental House (VR-House):** A single-family dwelling property available for visitor use on a short-term basis. May be a house, townhouse, duplex, multiplex, cabin, villa or cottage, where the owner does not reside on the property.
- **Vacation Rental Other (VR-Other):** Vacation rental units located in other types of properties not mentioned above. Includes private and shared rooms for visitor use and other non-traditional accommodations.

Timeshare: A timeshare is a type of property ownership in which guests acquire a shared interest in a hotel or condominium hotel unit for a specific period of time and on a recurring basis. Timeshare ownership is typically defined by intervals (a set number of days and nights of annual use) or points (a “currency”

that represents ownership and is used to establish value for seasons, unit sizes, and resort locations).

“Operated” timeshare units are those that have been sold and are currently (as of May 1) available for visitor use. “Registered” units include operated units and units that are not yet operating as visitor rentals.

Some timeshare units can be rented as one or two units as their design allows a single unit to be divided into two complete sections and operated as two units by securing a door between the sections. The number of keys

operated as timeshare reflect the number of distinct keys available for each unit.

Other: Includes lodges, inns, or any other form of property not included in the above definitions.

Owner-Occupied: Units not available for transient visitor use (30 days or less).

Not for visitor use: Includes owner-occupied units, residential rentals only, and units under remodeling.

Class of Units

The Visitor Plant Inventory survey also included questions about the class of units at each property. The subsequent tables show the percent of each class of units available by island. Units were classified as follows:

Class	Price Range (Rack Rate)
Budget	Up to \$100 per night
Standard	\$101 to \$250 per night
Deluxe	\$251 to \$500 per night
Luxury	Over \$500 per night

APPENDIX A: Survey Forms

Cover Letter Sample



Hawaii Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii 96815
kelepona tel 808 973 2255
kelepona fax 808 973 2253
kahua pa web hawaii-tourism-authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

July 1, 2017

RE: 2017 State of Hawai'i Visitor Plant Inventory Survey

Aloha,

The Hawai'i Tourism Authority (HTA) is in the process of updating the annual State of Hawai'i Visitor Plant Inventory report, and we would greatly appreciate your support and participation in this year's survey. Kloninger & Sims Consulting LLC has been contracted by HTA to conduct the 2017 Visitor Plant Inventory (VPI) survey.

Enclosed with this letter are:

- 2017 survey form pre-filled with your responses from 2016, if applicable
- Definition sheet

Please make your corrections directly on the survey form. If your information for 2017 is identical to 2016, simply sign and return the form.

Please submit your completed survey directly to Kloninger & Sims Consulting LLC via email (survey@kloningerandsims.com). The completed form can also be faxed to Kloninger & Sims Consulting LLC at (808) 441-5320.

We would greatly appreciate receiving this information by **July 21, 2017**. If you have any questions or need assistance in filling out the survey, please call Kloninger & Sims Consulting LLC at (808) 636-3337.

Sincerely,

Daniel K. Nahoopii
Director
Tourism Research

Repeat Participant Survey Form



Please review the existing data we have for your property, which is listed in the column labeled "2016." If the data is correct as of May 1st, 2017 simply check the box, and sign and date below. If the data is erroneous or needs to be revised, please provide the correct information in the second column and then sign and date. Definitions for each property type are listed in the Property Type Definition Sheet on the page prior to this survey. Please return the form to Kloninger & Sims Consulting by fax at (808) 441-5320 or via email (survey@kloningerandsims.com). For further information or clarification, please contact Kloninger & Sims Consulting LLC at (808) 457-1272. *Mahalo for your cooperation!*

☐ If the data listed for 2016 is correct as of May 1st, 2017, please check this box and sign and date below.

SIGNATURE: _____ DATE: _____

1. PROPERTY INFORMATION:

Current Name of Property:	
Physical Address Of Property:	
Physical City, State, Zip Code:	
Website:	
VPI ID:	

2. CONTACT INFORMATION:

	2016	2017
Name of management company for this property:		
Contact name:**		
Contact title:		
Contact company:		
Contact address:		
City, State Zip Code:		
Email:		
Phone:		
Fax:		

**If the person who manages the vacation rental property or properties is different than the person listed, please provide their name and contact information instead (if applicable)

3. PROPERTY UNIT COUNTS (TOTALS):

	2016	2017
A. Total # units for entire property		
B. # that are designated for visitor use		
C. # that are not for visitor use		

4. VISITOR UNITS FOR ENTIRE BUILDING/PROPERTY:

	2016	2017
A. Total # of visitor units for the entire property		
B. # that are operated as hotel		
C. # that are operated as condominium hotel (usually has a front desk)		
D. # that are registered as timeshare		
E. # that are operated as timeshare		
F. # keys operated as timeshare		
G. # that are operated as bed & breakfast		
H. # that are operated as vacation rental (VR)		
1. vacation rental condo (VR-Condo)		
2. vacation rental house (VR-House)		
3. vacation rental other (VR-Other)		
I. # that are operated as hostel		
J. # that are operated as apartment hotel		
K. # that are operated as other (please specify)		

5. PROPERTY DESCRIPTION AS OF MAY 1st, 2017:

A. # of structures on property		
B. # of floors in each property		

6. PROPERTY CHANGES AS OF MAY 1st 2017:

	2016	2017
A. # units converted to timeshare this year		
B. # units converted to condo-hotel this year		
C. # units converted to VRs this year		

7. AVERAGE ROOM RATES DURING PEAK SEASON:

A. # that have rates Up to \$100/night		
B. # that have rates \$101 to \$250		
C. # that have rates \$251 to \$500		
D. # that have rates Over \$500/night		
E. TOTAL (A+B+C+D)		

8. AVERAGE ROOM RATES DURING LOW SEASON:

A. # that have rates Up to \$100/night		
B. # that have rates \$101 to \$250		
C. # that have rates \$251 to \$500		
D. # that have rates Over \$500/night		
E. TOTAL (A+B+C+D)		

9. PROPERTY MILESTONES

A. Year property first opened		
B. Year of last major renovation (Property restored to like-new condition)		

Repeat Participant Survey Form Vacation Rental Units, Bed & Breakfast, Hostel, and Other Survey Form



HAWAII TOURISM
AUTHORITY

Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepona fax 808 973 2253
kahua pa'a web hawaii-tourism-authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

Please review the existing data we have for your property, listed in the column labeled "2016 Data". If the data as of May 1st, 2017 is correct, simply check the box and provide your signature and date. If the data is incorrect or needs to be revised, please provide the correct information in the second column and then sign and date. Definitions for each property type are listed on the Property Type Definition Sheet on the prior page. Please return the form to Kloninger & Sims Consulting LLC in the self-addressed stamped envelope, by fax at (808) 441-5320 or via email (survey@kloningerandsims.com). For further information or clarification, please contact Kloninger & Sims Consulting LLC at (808) 457-1272. *Mahalo for your cooperation.*

☐ If the data listed for 2016 is correct as of May 1st, 2017, please check this box and sign and date below.

SIGNATURE: _____

DATE: _____

1. PROPERTY INFORMATION

- A. Current name of property:
- B. Physical address of property:
- C. Physical city, state, zip code:
- D. Website:
- E. Name of building/complex:
- F. VPI ID:

2016 Data

2017 Correction

2. VISITOR UNITS MANAGED BY YOU AT THIS ADDRESS

- A. Total number of visitor units for entire property
- B. # that are operated as bed & breakfast
- C. # that are operated as vacation rental (VR)
 - 1. vacation rental condo (VR-Condo)
 - 2. vacation rental house (VR-House)
 - 3. vacation rental other (VR-Other)
- D. # that are operated as hostel
- E. # that are operated as apartment hotel
- F. # that are registered as timeshare
- G. # that are operated as timeshare
- H. # of keys operated as timeshare
- I. # that are operated as other

3. PROPERTY DESCRIPTION

- A. # of structures on property
- B. # of floors on property

4. AVERAGE ROOM RATES DURING PEAK SEASON

- A. # that have rack rates Up to \$100/night
- B. # that have rack rates \$101 to \$250
- C. # that have rack rates \$251 to \$500
- D. # that have rack rates Over \$500/night
- E. TOTAL (A+B+C+D)

5. AVERAGE ROOM RATES DURING LOW SEASON

- A. # that have rack rates Up to \$100/night
- B. # that have rack rates \$101 to \$250
- C. # that have rack rates \$251 to \$500
- D. # that have rack rates Over \$500/night
- E. TOTAL (A+B+C+D)

6. YEAR PROPERTY FIRST OPENED:

Year:

--	--

7. YEAR OF LAST MAJOR RENOVATION

(Property restored to like-new condition):

--	--

8. CONTACT INFO:

- A. Contact Name/Title:
- B. Contact Company:
- C. Contact Address:
- D. City, State, Zip Code:
- E. Email:
- F. Phone:
- G. Fax:

New Properties Survey Form



HAWAII TOURISM
AUTHORITY

Hawaii Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pu'a web hawaii-tourism-authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

The Hawaii Tourism Authority is updating the State of Hawaii's annual Visitor Plant Inventory, the official census of visitor accommodations in the state. All information should be correct as of **May 1st, 2017**. Definitions for each property type are listed on the Property Type Definition Sheet on the prior page. Please return the form to Kloninger & Sims Consulting LLC in the self-addressed stamped envelope, by fax at (808) 441-5320 or via email (survey@kloningerandsims.com). For further information or clarification, please contact Kloninger & Sims Consulting LLC at (808) 457-1272. *Mahalo for your cooperation.*

SIGNATURE: _____

DATE: _____

2017 Data

1. PROPERTY INFORMATION

- A. Current name of property:
- B. Physical address of property:
- C. Physical city, state, zip code:
- D. Website:
- E. Name of building/complex:
- F. VPI ID:

2. VISITOR UNITS MANAGED BY YOU AT THIS ADDRESS

- A. Total number of visitor units for entire property
- B. # that are operated as bed & breakfast
- C. # that are operated as vacation rental (VR)
 - 1. vacation rental condo (VR-Condo)
 - 2. vacation rental house (VR-House)
 - 3. vacation rental other (VR-Other)
- D. # that are operated as hostel
- E. # that are operated as apartment hotel
- F. # that are registered as timeshare
- G. # that are operated as timeshare
- H. # of keys operated as timeshare
- I. # that are operated as other

3. PROPERTY DESCRIPTION

- A. # of structures on property
- B. # of floors on property

4. AVERAGE ROOM RATES DURING PEAK SEASON

- A. # that have rack rates Up to \$100/night
- B. # that have rack rates \$101 to \$250
- C. # that have rack rates \$251 to \$500
- D. # that have rack rates Over \$500/night
- E. TOTAL (A+B+C+D)

5. AVERAGE ROOM RATES DURING LOW SEASON

- A. # that have rack rates Up to \$100/night
- B. # that have rack rates \$101 to \$250
- C. # that have rack rates \$251 to \$500
- D. # that have rack rates Over \$500/night
- E. TOTAL (A+B+C+D)

AOUO Survey



The Hawai'i Tourism Authority is updating the State of Hawai'i annual Visitor Plant Inventory, the official census of visitor accommodations in the state. All information should be correct as of **May 1, 2017**. Definitions for each property type are listed on the Property Type Definition Sheet. Please sign the form and return it to Kloninger & Sims Consulting LLC by fax to (808) 441-5320 or email to survey@kloningerandsims.com. For further information or clarification, please contact Kloninger & Sims at (808) 457-1272. ***Mahalo for your cooperation.***

1. PROPERTY INFORMATION:

- a) Name of building/complex _____
- b) Physical address of property: _____
- c) Physical city, state, zip code: _____
- d) Contact Name _____
- e) Contact Company: _____
- f) Address: _____
- g) Email: _____
- h) Phone: _____
- i) Fax: _____
- j) Website: _____

2. PROPERTY UNIT COUNTS (TOTALS)

- a) # that are for visitor use _____
- b) # that are owner-occupied/residential tenants _____
- c) Total # units for entire property (a+b) _____

3. VISITOR UNITS

- | | Resort Management Co 1 | Resort Management Co 2 |
|--|------------------------|------------------------|
| a) Name of Resort Management Company | | |
| b) # of visitor units managed by Resort Management Company | | |
| c) Visitor Unit Type (ie. condo units, timeshare, villa) | | |

- | | Resort Management Co 3 | Individual Vacation Unit
(VRBO, Home Away, Rented by owner) |
|--|------------------------|--|
| a) Name of Resort Management Company | | |
| b) # of visitor units managed by Resort Management Company | | |
| c) Visitor Unit Type (ie. condo units, timeshare, villa) | | |

SIGNATURE: _____

DATE: _____

Management Company Survey Spreadsheet

2017 State of Hawaii Visitor Plant Inventory Survey

Management Company:
 Contact Person:
 Title:
 Address:
 City, State Zip Code:
 Phone:
 Fax:
 Email:
 Website:

Unit Type
Apartment/Hotel
B&B
Condo/Hotel
Hotel
Hostel
VR-Condo
VR-House
VR-Other
Timeshare
Other

[illegible]

NOTE: At minimum, please fill out property addresses, unit types, & number of units for each of the properties above. Please add any other properties you manage that we do not have on file.
Please email or fax completed database to:
Email: survey@Koningersandsims.com
Fax: 808-441-5320
Phone: 808-457-1272

Definition Sheet

VISITOR PLANT INVENTORY SURVEY DEFINITION SHEET

Apartment / Hotel	Visitor accommodations units typically located in low-rise apartment-style buildings and available for short-term rental. Units may have kitchens and laundry facilities. Front desk operations and housekeeping service are limited and sometimes non-existent.
Bed & Breakfast (B&B)	A lodging facility with a limited number of guest units, available for short-term rental. Services include breakfast in the daily rental rate. Typical bed and breakfast facilities may be small, quaint inns or family homes.
Condominium Hotel	A multi-unit property legally classified as a condominium with each unit individually deeded. Generally, units are collectively placed into transient hotel rental operations, offering most of the services of a hotel, such as daily housekeeping service and front desk operations. Condominium hotel units are larger than hotel units and include studios and one- to three-bedroom units, with kitchen and laundry facilities, available for transient use on short-term rental basis (30 days or less).
Hotel	A multi-unit lodging facility that provides room accommodations on a short-term rental basis. Services often include a pool, restaurant operations, and other "away from home" services such as daily housekeeping service and front desk operations.
Hostel	An inexpensive, limited-service lodging facility, often with dormitory-style accommodations. They are available for short-term rental and are frequently used by younger travelers.
Vacation Rental (VR)	An individual vacation rental unit available for visitor use on a short-term basis (30 days or less). VRs usually include kitchens, laundry facilities, and parking garages. Services are very limited although some may include some housekeeping service. • Vacation Rental in a Condominium Hotel (VR-Condo): A condominium hotel unit available for visitor use on a short-term basis. VR-Condos are not rented or managed by the condominium hotel management, but are available through individual owners, property managers, or Internet agencies. • Vacation Rental House (VR-House): A single-family dwelling property available for visitor use on a short-term basis. May be a house, townhouse, duplex, multiplex, cabin, villa or cottage, where the owner does not reside on the property. • Vacation Rental Other (VR-Other): Vacation rental units located in other types of properties not mentioned above. Includes private and shared rooms for visitor use and other non-traditional accommodations.
Timeshare	A timeshare is a type of property ownership in which guests acquire a shared interest in a hotel or condominium hotel unit for a specific period of time and on a recurring basis. Timeshare ownership is typically defined by intervals (a set number of days and nights of annual use) or points (a "currency" that represents ownership and is used to establish value for seasons, unit sizes, and resort locations). "Operated" timeshare units are those that have been sold and are currently (as of May 1) available for visitor use. "Registered" units include operated units and units that are not yet operating as visitor rentals. Some timeshare units can be rented as one or two units as their design allows a single unit to be divided into two complete sections and operated as two units by securing a door between the sections. The number of keys operated as timeshare reflect the number of distinct keys available for each unit.
Other	Includes lodges, inns, or any other form of property not included in the above definitions.
Owner-Occupied	Units not available for transient visitor use (30 days or less).
Not for visitor use	Includes owner-occupied units, residential rentals only, and units under remodeling.

APPENDIX B: Supplemental Report: Individually Advertised Units in Hawai'i

Introduction

In addition to the survey data gathered for the Visitor Plant Inventory, data extracted from four vacation rental booking sites was also gathered. The Visitor Plant Inventory has traditionally included vacation rentals as a property type. Due to the large number of vacation rental properties and the fluid nature of the vacation rental supply, however, identifying and gathering survey data from vacation rentals has been a challenge. As a result, the Visitor Plant Inventory survey has likely undercounted the actual number of vacation rental units.

The data extraction from the booking sites represents a point-in-time analysis. As properties are added to or removed from the booking sites, the number of vacation rental units advertised on the sites will change. The three booking sites analyzed were:

- Airbnb
- HomeAway
- TripAdvisor

In previous years, four booking sites were analyzed (Airbnb, ClearStay, FlipKey and VRBO). For this year's study, HomeAway replaced ClearStay and VRBO, which are both subsidiaries of HomeAway. TripAdvisor replaced its subsidiary FlipKey. The decision to revisit the composition of the sample was dictated by the absorption of ClearStay into the HomeAway site, with corresponding termination of ClearStay as a standalone platform. While ClearStay had been the site with the fewest listings, the listings on the site included verified property addresses, which provided unique identifying information that was used to identify duplicate listings on other booking sites

It should be noted that the numbers cited in this section likely overstate the number of individually advertised vacation rental units. Because of the lack of unique identifying information associated with each vacation rental unit listed on the booking sites, it is currently not possible to identify and eliminate much of the double and triple counting that occurs when a property is listed on multiple booking sites. Where possible we have eliminated duplication across the booking sites but were only able to do so when listings contained unique identifying information, primarily a street address or condominium name and unit number. In some cases we identified duplicate listings based on the listing name, price point or listing photos. A relatively small percentage of the listings included the property address or condominium unit number. Among those listings that did include such unique identifiers, we found a high degree of duplication on other booking sites.

The three booking websites represent relatively new channels of distribution for vacation rental properties, many of which have been in operation for decades and have historically been counted by the Visitor Plant Inventory survey. It is therefore not appropriate to add the number of individually advertised vacation rental units discussed in this section to the total number of visitor units from the Visitor Plant Inventory survey. There was some degree of overlap between the survey data and the booking site data, making the estimate subject to a good deal of uncertainty. At the end of this section an estimate of the actual number of individually advertised vacation rental units is presented, net of estimated double- and triple-counted units.

Individually Advertised Vacation Rentals Trends

Based on data extracted from the three booking websites, there were 38,100 individually advertised vacation rental units listed in the State of Hawai'i in 2017, a 17.0% increase from the 2016 count, as shown in Table 14. Some of the increase could be attributable to a change in the business model of HomeAway, which has been shifting from charging hosts a flat fee to charging a percentage of booking revenue. This change has likely encouraged hosts that had previously listed their units on one of the other sites to also list on HomeAway.

Maui continued to have the largest number of individually advertised vacation rental units in 2017, with 13,418 units. Maui also saw the most growth compared to 2016, with the number of units increasing by 24.4%. O'ahu reported the smallest increase in number of individually advertised units, with the 2017 count increasing by 7.3%.

The total number of bedrooms available in individually advertised units increased by 43.5% in 2017, as can be seen in Table 15. This suggests that there was a shift toward larger units during the year. It is possible that an increase in the number of HomeAway listings contributed to the faster growth in the number of bedrooms, due to HomeAway's strength in the VR House segment.

Table 14: Individually Advertised Units by Island

Island	Number of Individually Advertised Units		Change from 2016
	2017	2016	
Hawai'i Island	8,647	7,431	16.4%
Kaua'i	6,253	5,164	21.1%
Lāna'i	26	16	62.5%
Maui	13,418	10,789	24.4%
Moloka'i	315	367	-14.2%
O'ahu	9,441	8,798	7.3%
State of Hawai'i	38,100	32,565	17.0%

Table 15: Estimated Number of Bedrooms by Island

Island	Total Estimated Number of Bedrooms		Change from 2016
	2017	2016	
Hawai'i Island	16,956	11,990	41.4%
Kaua'i	12,031	7,883	52.6%
Lāna'i	61	37	64.9%
Maui	20,599	13,267	55.3%
Moloka'i	421	387	8.8%
O'ahu	16,441	12,798	28.5%
State of Hawai'i	66,509	46,362	43.5%

In Table 16, data on individually advertised vacation rental units are broken down by island and type. VR Houses and VR Condos represented the overwhelming majority of the units that were individually advertised on the three booking sites analyzed. VR Condos represent the largest share of the state's supply of individually advertised vacation rental units, accounting for 23,742 of the 38,010 units. The 10,850 Maui VR Condos represented the largest share of the state's VR Condos, followed by O'ahu's 4,907 VR Condo units.

VR Houses accounted for the second highest share of individually advertised vacation rental units, with 11,533. Hawai'i Island reported the greatest number of VR Houses, with 3,900, followed by O'ahu's 3,625. In previous years Oahu had accounted for the largest share of VR Houses among the islands.

Individually Advertised Units: Shared Accommodations

Airbnb is the only one of the three booking sites analyzed that lists shared accommodations, meaning the guest is only renting part of a unit. These include Private Rooms (a room within a unit occupied by the host or another guest) or a Shared Room (the guest shares a room with others). As seen in Table 16, shared accommodations represented a small share of the total units listed in Hawai'i during our extraction analysis, with Private rooms accounting for nearly 2,000 units statewide and Shared Rooms contributing another 100 units.

Table 16: Individually Advertised Units by Type

Island	VR House	VR Condo	B&B	Private Room	Shared Room	Other	Total
Hawai'i Island	3,900	3,625	68	798	42	183	8,616
Kaua'i	1,874	4,114	4	166	9	82	6,249
Lāna'i	17	7	-	2	-	-	26
Maui	2,088	10,850	24	288	22	115	13,387
Moloka'i	65	239	-	4	-	7	315
O'ahu	3,589	4,907	23	739	24	135	9,417
State of Hawai'i	11,533	23,742	119	1,997	97	522	38,010

% of total	VR House	VR Condo	B&B	Private Room	Shared room	Other	Total
Hawai'i Island	33.8%	15.3%	57.1%	40.0%	43.3%	35.1%	22.7%
Kaua'i	16.2%	17.3%	3.4%	8.3%	9.3%	15.7%	16.4%
Lāna'i	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
Maui	18.1%	45.7%	20.2%	14.4%	22.7%	22.0%	35.2%
Moloka'i	0.6%	1.0%	0.0%	0.2%	0.0%	1.3%	0.8%
O'ahu	31.1%	20.7%	19.3%	37.0%	24.7%	25.9%	24.8%
State of Hawai'i	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 17 (page 61) presents data collected on the price categories of individually advertised vacation rental units in Hawai'i. These data can be compared with data collected by the Visitor Plant Inventory survey, which report price category data across a variety of accommodation types.

Based on the data collected from the three vacation rental booking sites, Budget and Standard price class units represented a much larger share of the individually advertised vacation rental units compared with the overall supply of visitor units. Budget-priced units (up to \$100/night) represented 14.6% of the individually advertised vacation rental units, compared with 3.4% of the overall supply of visitor units that were Budget. A majority (54.7%) of the individually advertised vacation rental units were in the Standard price category in 2017, compared with 25.1% of the overall supply of visitor units that provided price class data.

The shares of Budget and Standard (\$101 to \$250/night) individually advertised vacation rental units both increased, indicating that the supply increases at the lower end of the market is driving overall growth.

It should be noted that these data are not strictly comparable due to the fact that the Visitor Plant Inventory survey data are based on self-reported rack rates, generally the highest price that a room rents for. Hotel rooms typically rent for a large discount from the rack rate. The pricing in the vacation rental booking site data represents the price that a particular unit can be rented during a specific point in time. Nevertheless, it does appear that vacation rental inventory is generally lower-priced than the overall supply of Hawai'i's visitor accommodations.

Table 17: Individually Advertised Units by Island and Class of Unit

Island	Class	PERCENT OF TOTAL UNITS		Percentage Point Change from 2016
		2017	2016	
Hawai'i Island	Budget (Up to \$100)	26.1%	23.1%	3.0%
	Standard (\$101 to \$250)	44.5%	52.0%	-7.5%
	Deluxe (\$251 to \$500)	12.3%	15.6%	-3.2%
	Luxury (Over \$500/Night)	5.8%	9.3%	-3.5%
	Total	100.0%	100.0%	
Kaua'i	Budget (Up to \$100)	4.8%	6.6%	-1.7%
	Standard (\$101 to \$250)	53.1%	53.3%	-0.2%
	Deluxe (\$251 to \$500)	27.9%	28.3%	-0.4%
	Luxury (Over \$500/Night)	8.6%	11.8%	-3.2%
	Total	100.0%	100.0%	
Lāna'i	Budget (Up to \$100)	4.2%	7.1%	-3.0%
	Standard (\$101 to \$250)	33.3%	35.7%	-2.4%
	Deluxe (\$251 to \$500)	54.2%	28.6%	25.6%
	Luxury (Over \$500/Night)	8.3%	28.6%	-20.2%
	Total	100.0%	100.0%	
Maui	Budget (Up to \$100)	4.8%	4.6%	0.1%
	Standard (\$101 to \$250)	55.2%	59.5%	-4.3%
	Deluxe (\$251 to \$500)	22.0%	24.4%	-2.4%
	Luxury (Over \$500/Night)	9.3%	11.5%	-2.2%
	Total	100.0%	100.0%	
Moloka'i	Budget (Up to \$100)	28.4%	44.1%	-15.7%
	Standard (\$101 to \$250)	54.6%	52.8%	1.8%
	Deluxe (\$251 to \$500)	5.4%	1.9%	3.6%
	Luxury (Over \$500/Night)	1.3%	1.2%	0.0%
	Total	100.0%	100.0%	
O'ahu	Budget (Up to \$100)	18.9%	16.4%	2.5%
	Standard (\$101 to \$250)	46.3%	51.4%	-5.1%
	Deluxe (\$251 to \$500)	16.9%	18.1%	-1.2%
	Luxury (Over \$500/Night)	10.8%	14.0%	-3.2%
	Total	100.0%	100.0%	
Statewide	Budget (Up to \$100)	14.6%	12.4%	2.1%
	Standard (\$101 to \$250)	54.8%	54.7%	0.1%
	Deluxe (\$251 to \$500)	21.2%	21.3%	-0.1%
	Luxury (Over \$500/Night)	9.5%	11.6%	-2.1%
	Total	100.0%	100.0%	

As shown in Table 18, VR Houses represented a larger share of Deluxe and Luxury vacation rental units than VR Condos, likely due to houses tending to be larger and have a greater number of bedrooms than condominiums. Luxury units (over \$500/night) represented 20.5% of VR Houses in the sample of individually advertised vacation rentals, compared to just 3.7% of the VR Condos. The Budget category (up to \$100/night) of VR House increased its share of the VR House category to 18.4% in 2017, up from 13.8% in 2016. All other price classes of VR Houses saw their share of the VR House market decrease in 2017.

Approximately two-thirds of the VR Condos (65.1%) reported nightly rates in the Standard Class (\$101 to \$250/night).

Table 18: Individually Advertised Units by Type and Class of Unit

Property Type	Class	PERCENT OF TOTAL UNITS		Percentage Point Change from 2016
		2017	2016	
Vacation Rental House	Budget (Up to \$100)	18.4%	13.8%	4.6%
	Standard (\$101 to \$250)	36.3%	37.3%	-1.0%
	Deluxe (\$251 to \$500)	24.7%	25.7%	-0.9%
	Luxury (Over \$500/Night)	20.5%	23.2%	-2.6%
	Total	100.0%	100.0%	
Vacation Rental Condo	Budget (Up to \$100)	11.4%	10.7%	0.6%
	Standard (\$101 to \$250)	65.1%	65.6%	-0.4%
	Deluxe (\$251 to \$500)	19.8%	19.1%	0.7%
	Luxury (Over \$500/Night)	3.7%	4.6%	-0.9%
	Total	100.0%	100.0%	
Bed & Breakfast	Budget (Up to \$100)	33.5%	34.2%	-0.6%
	Standard (\$101 to \$250)	57.7%	56.0%	1.7%
	Deluxe (\$251 to \$500)	8.2%	5.8%	2.3%
	Luxury (Over \$500/Night)	0.6%	4.0%	-3.4%
	Total	100.0%	100.0%	
Other	Budget (Up to \$100)	39.6%	42.3%	-2.6%
	Standard (\$101 to \$250)	44.9%	39.8%	5.1%
	Deluxe (\$251 to \$500)	9.8%	6.5%	3.3%
	Luxury (Over \$500/Night)	5.7%	11.4%	-5.7%
	Total	100.0%	100.0%	
Statewide	Budget (Up to \$100)	14.5%	12.4%	2.1%
	Standard (\$101 to \$250)	54.8%	54.7%	0.1%
	Deluxe (\$251 to \$500)	21.2%	21.3%	-0.1%
	Luxury (Over \$500/Night)	9.5%	11.6%	-2.1%
	Total	100.0%	100.0%	

Individually Advertised Vacation Rental Units and Housing Units

As shown in the tables below and island maps on the following pages, most of the individually advertised vacation rental units were located within the state's resort areas. It is likely that most of these units have historically been available as visitor units and as such are accounted for in the Visitor Plant Inventory survey. For such units, the three booking sites studied represent a relatively new channel of distribution.

While the largest numbers of individually advertised vacation rental units were located within traditional resort areas, the tables also show that there were vacation rentals available in almost every zip code across the state.

Table 19: Hawai'i Island: Individually Advertised Units by Zip Code

City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Captain Cook	96704	439	2,938	14.9
Hakalau	96710	48	275	17.5
Hāwī	96719	85	655	13.0
Hilo	96720 / 96721	431	17,770	2.4
Hōlualoa	96725	109	1,469	7.4
Hōnaunau	96726	26	271	9.6
Honoka'a	96727	94	1,857	5.1
Honolulu	96728	13	253	5.1
Kailua-Kona	96740 / 96739	3,012	16,843	17.9
Kamuela	96743	1,096	5,668	19.3
Kapa'au	96755	16	1,384	1.2
Kea'au	96749	369	6,645	5.6
Kealahou	96750	57	1,466	3.9
Kurtistown	96760	17	1,335	1.3
Laupāhoehoe	96764	12	357	3.4
Mountain View	96771	267	3,660	7.3
Nā'ālehu	96772	73	1,089	6.7
Nīnole	96773	22	105	21.0
Ocean-View	96737	39	2,450	1.6
Ookala	96774	4	124	3.2
Paauilo	96776	9	607	1.5
Pāhala	96777	72	575	12.5
Pāhoa	96778	889	6,685	13.3
Pāpa'ikou	96781	33	654	5.0
Papaaloa	96780	9	202	4.5
Pepeekeo	96783	44	789	5.6
Volcano	96785	472	1,776	26.6
Waikoloa	96738	890	4,421	20.1

Table 20: Kaua'i Individually Advertised Units by Zip Code

City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Anahola	96703	67	899	7.5
Hanalei	96714	358	959	37.3
Hanapēpē	96716	1	982	0.1
Kalāheo	96741	11	2,370	0.5
Kapa'a	96746	1,123	8,134	13.8
Kaunakani	96747	2	219	0.9
Kealia	96751	2	69	2.9
Kekaha	96752	41	1,382	3.0
Kīlauea	96754	144	1,706	8.4
Kōloa	96756	2,256	3,247	69.5
Lāwa'i	96765	9	210	4.3
Līhu'e	96766 / 96715	302	5,296	5.7
Makaweli	96769	-	185	0.0
Princeville	96722	1,728	2,464	70.1
Waimea	96796	218	887	24.6

Table 21: Maui Individually Advertised Units by Zip Code

City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Haiku	96708	261	4,394	5.9
Hāna	96713	144	964	14.9
Kahului	96732	13	7,638	0.2
Kīhei	96753	6,280	18,059	34.8
Kula	96790	52	3,664	1.4
Lahaina / Kapalua	96761	5,991	11,928	50.2
Makawao / Pukalani	96768 / 96788	80	6,729	1.2
Pā'ia	96779	197	1,292	15.2
Wailuku	96793	390	10,564	3.7

Table 22: Moloka'i and Lāna'i Individually Advertised Units by Zip Code

City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Lānai	96763	26	1,545	1.7
Moloka'i: Kaunakakai	96748	175	2,159	8.1
Moloka'i: Maunaloa	96770	140	757	18.5
Moloka'i and Lāna'i Combined		341	4,857	7.0

Table 23: O'ahu Individually Advertised Units by Zip Code

City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Aiea	96701	63	14,008	0.4
Ewa Beach	96706	150	18,319	0.8
Hale'iwa	96712	888	3,028	29.3
Hau'ula	96717	400	1,826	21.9
Honolulu: Aina Haina & Niu Valley	96821	31	7,295	0.4
Honolulu: Ala Moana	96814	88	11,187	0.8
	96801			
Honolulu: Downtown	96812	31	10,542	0.3
	96813			
Honolulu: Hawai'i Kai	96825	92	11,592	0.8
Honolulu: Kāhala & Kaimukī	96816	234	18,914	1.2
Honolulu: Mānoa	96822	7	19,372	0.0
Honolulu: Mō'ili'ili	96826	3	15,948	0.0
Honolulu: Moanalua	96819	5	12,399	0.0
Honolulu: Nu'uanu	96817	8	20,157	0.0
Honolulu: Waikīkī	96815	3,640	22,750	16.0
Ka'a'awa	96730	56	617	9.1
Kahuku	96731	422	1,297	32.5
Kailua	96734	1,045	16,548	6.3
Kāne'ohe	96744	335	17,803	1.9
Kapolei	96707	729	12,461	5.9
Kunia	96759	-	119	0.0
Lā'ie	96762	257	1,188	21.6
Milliani	96789	44	18,650	0.2
Pearl City	96782	11	12,089	0.1
Wahiawā	96786	18	12,842	0.1
Wai'anae	96792	393	13,376	2.9
Wai'alua	96791	278	2,776	10.0
Waimānalo	96795	187	2,494	7.5
Waipahu	96797	25	19,986	0.1

Figure 41: Hawai'i Island Number of Individually Advertised Units by Zip Code

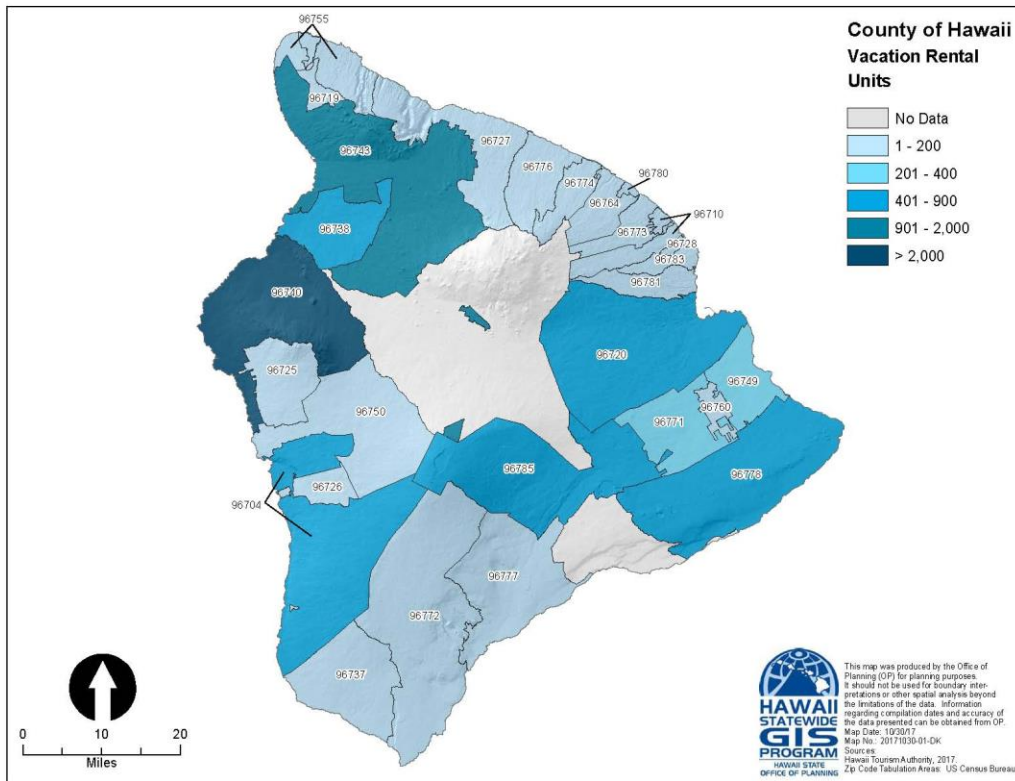


Figure 42: Hawai'i Island Individually Advertised Units Density by Zip Code

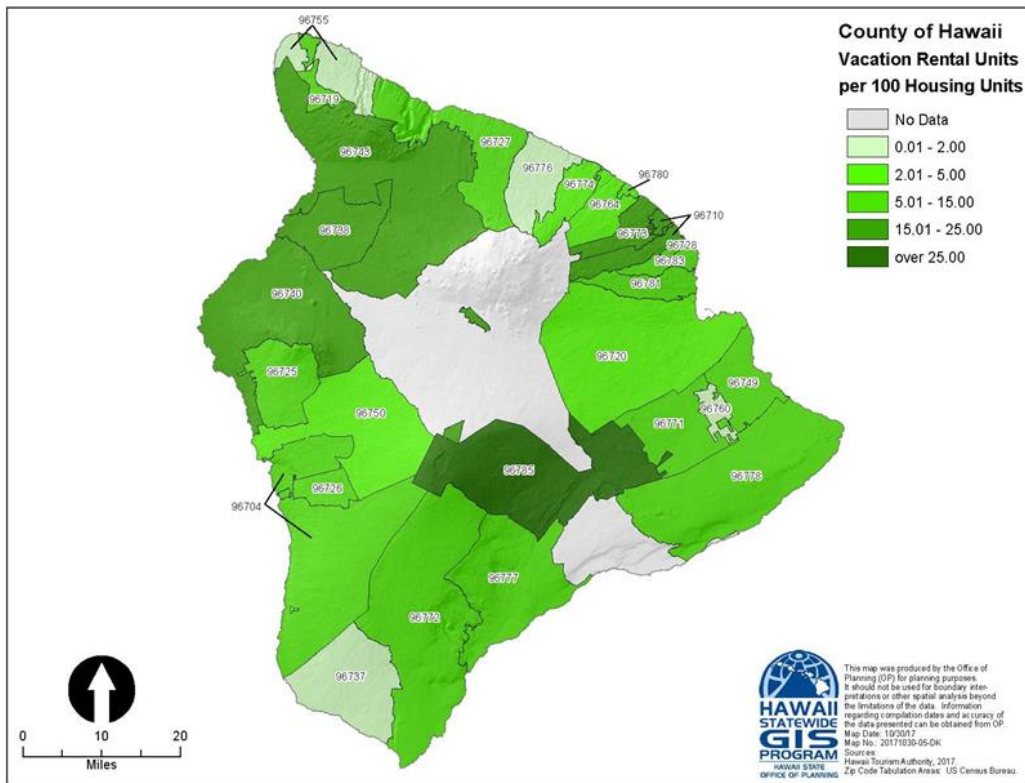


Figure 43: Kaua'i Number of Individually Advertised Units by Zip Code

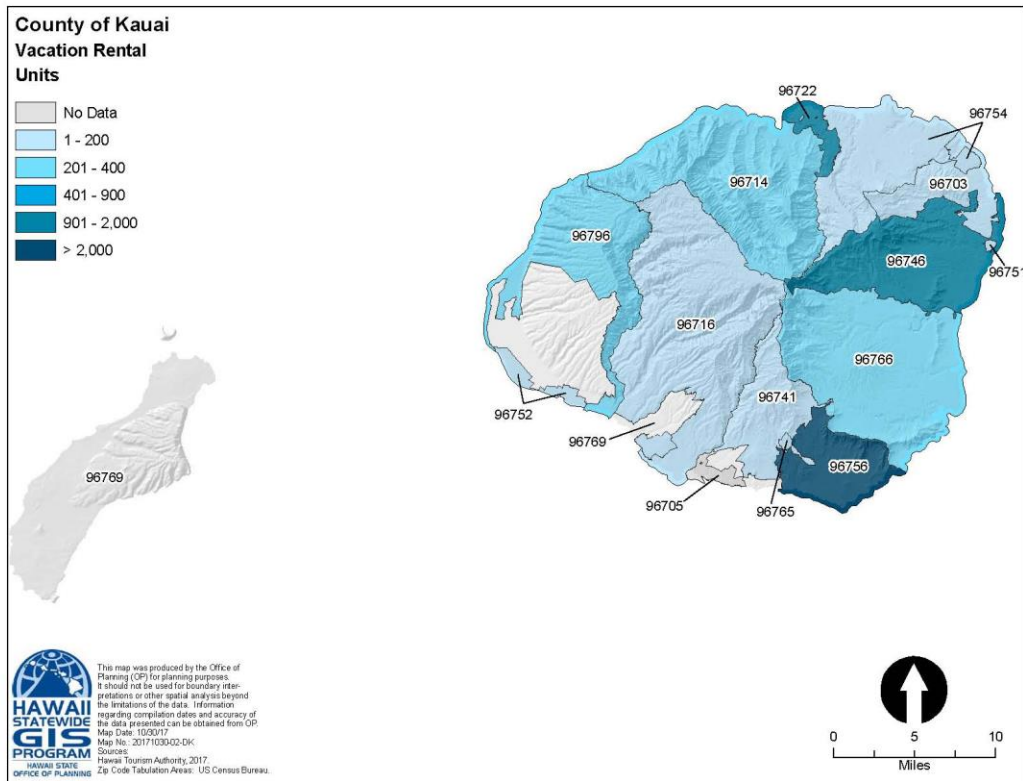


Figure 44: Kaua'i Individually Advertised Units Density by Zip Code

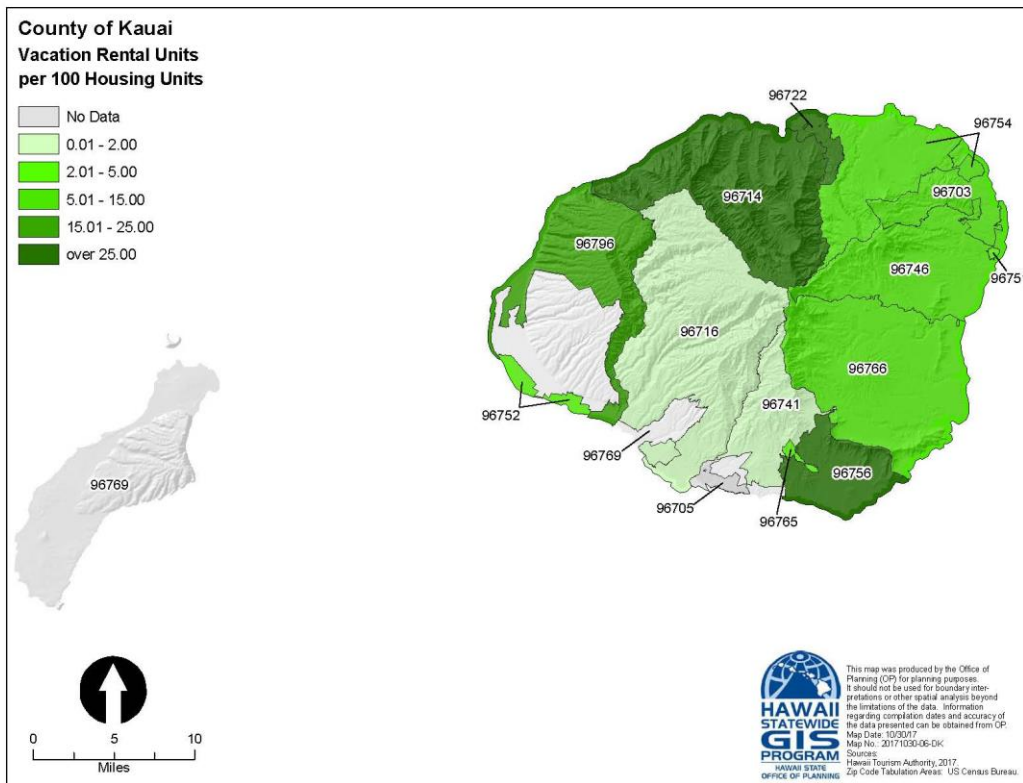


Figure 45: Maui County Number of Individually Advertised Units by Zip Code

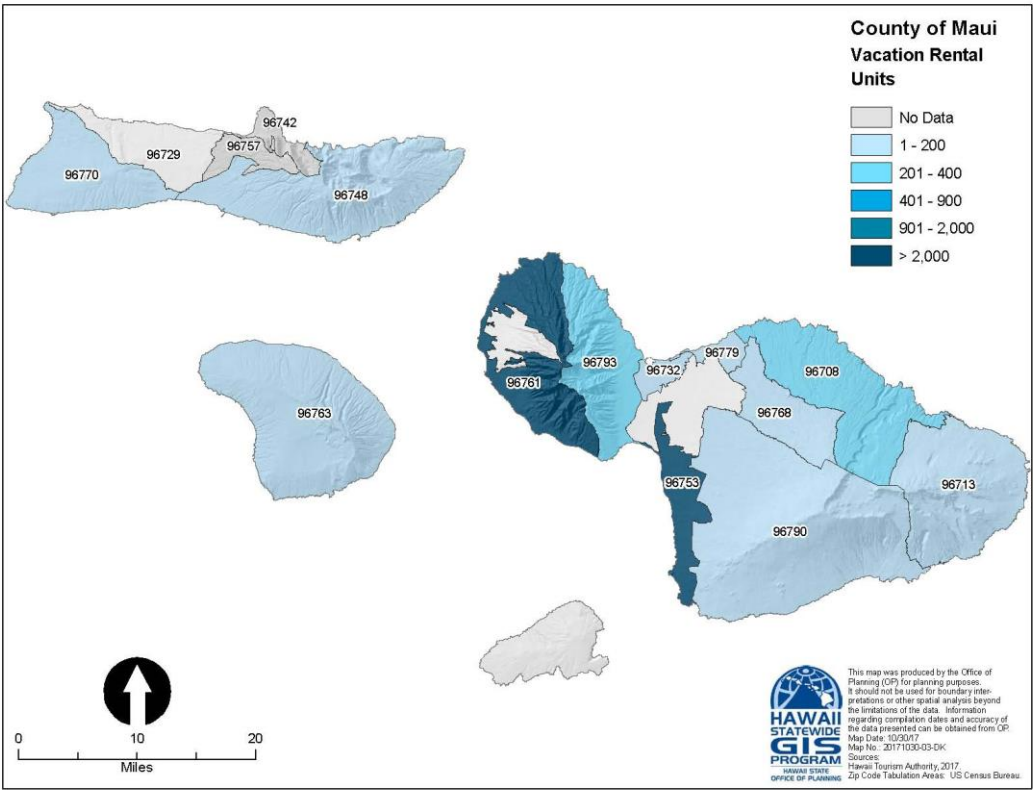


Figure 46: Maui County Individually Advertised Units Density by Zip Code

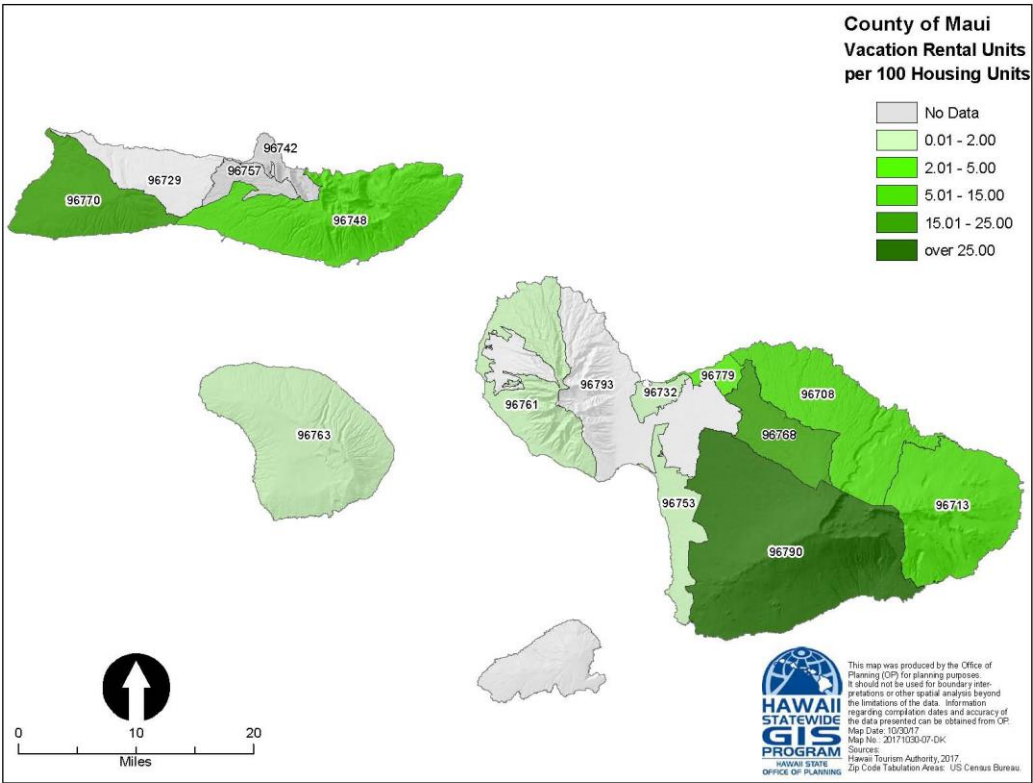


Figure 47: O'ahu Number of Individually Advertised Units by Zip Code

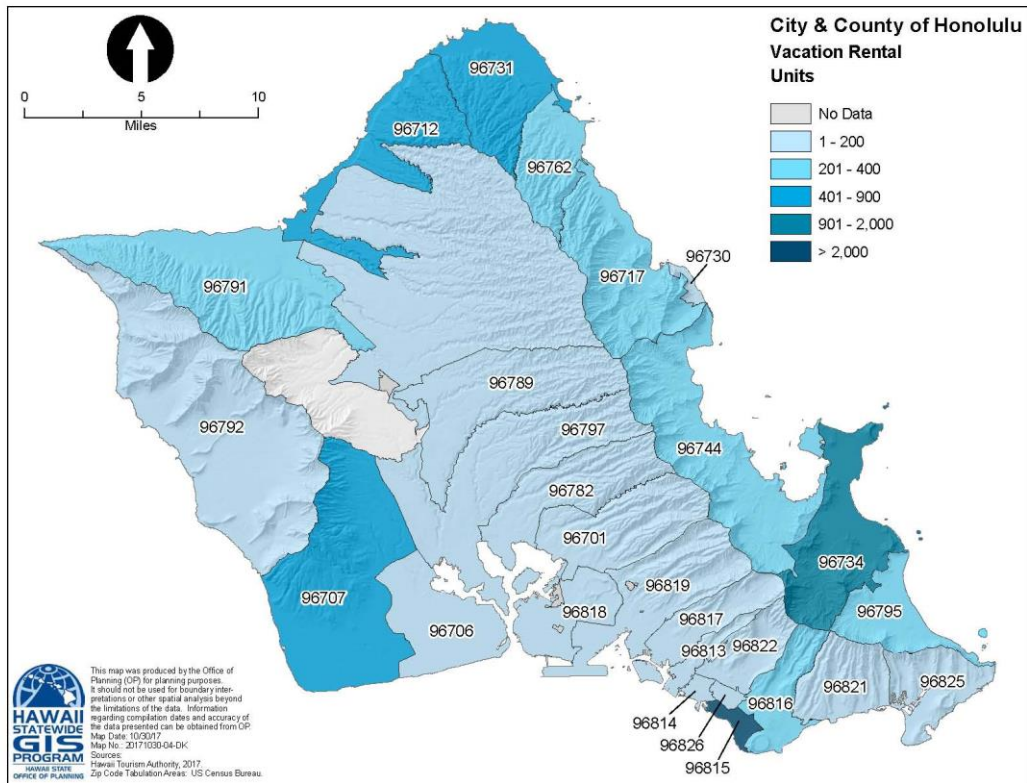
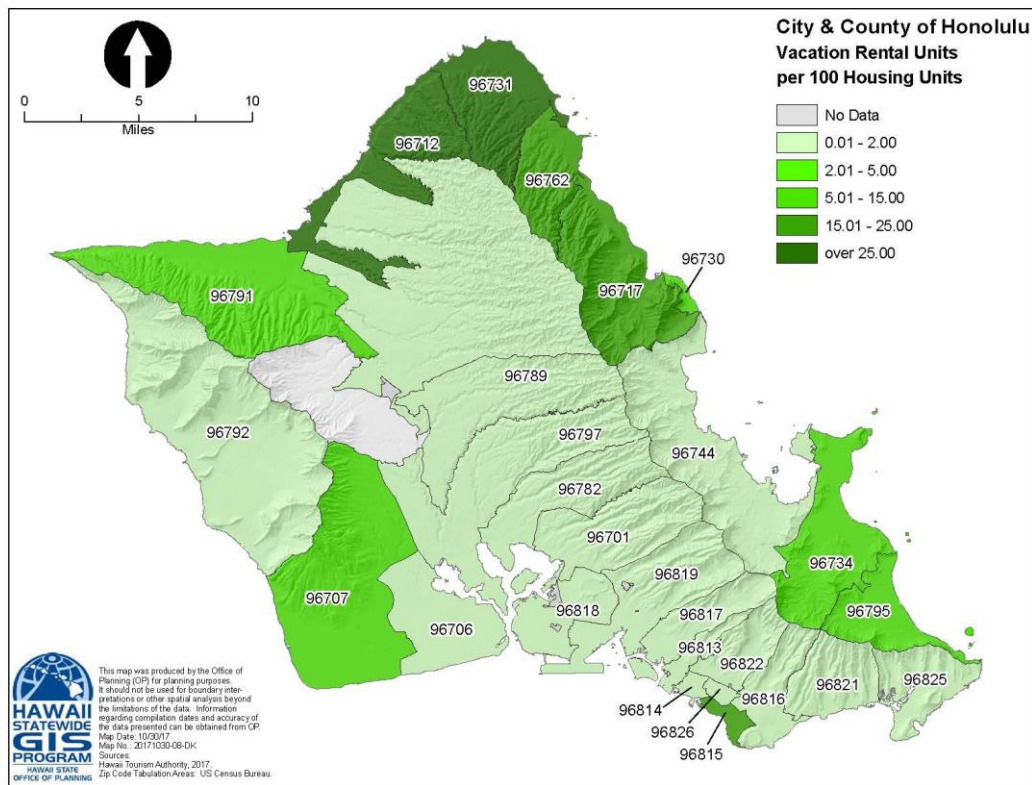


Figure 48: O'ahu Individually Advertised Units Density by Zip Code



Estimate of Total Number of Individually Advertised Vacation Rentals

As discussed previously, the lack of unique identifying information in most vacation rental listings made identifying and eliminating duplicate listings difficult. The listings that did include unique identifying information allowed for several thousand duplicate listings to be identified. Based on an estimate of the incidence of duplication among the units not associated with unique identifiers, there were an estimated 15,000 additional duplicate listings among the 38,010 individually advertised vacation rental listings analyzed. The estimated total number of unique vacation rentals advertised on the three sites was approximately 23,000 units in 2017.

Table 24: Number of Lodging Units in the State of Hawai'i by Type

Lodging Type	2017		2016	
	Units	% Mix	Units	% Mix
Hotel	44,431	47.8%	43,912	50.9%
Condo Hotel	10,875	12.1%	10,918	12.6%
Timeshare	11,062	12.1%	10,716	12.4%
Hostel	311	0.3%	307	0.4%
Apartment Hotel	101	0.1%	99	0.1%
Other	390	0.4%	399	0.5%
Individually Advertised Units (Vacation Rentals)	23,000	27.1%	20,000	23.2%
Total	90,170	100.0%	86,351	100.0%

METHODS AND PROCEDURES: Individually Advertised Units In Hawai'i

The analysis of individually advertised vacation rentals in the State of Hawai'i was performed based on data extracted from three booking websites:

- Airbnb
- TripAdvisor
- Homeaway

In previous years, four websites were used for the study; Airbnb, ClearStay, Flipkey by TripAdvisor, and VRBO. With changes in the online vacation rental marketplace, we change our methods to provide the most accurate overview of the Hawai'i online vacation rental market.

Data Extraction

Commercially available software was used to extract data from the three booking websites. The extractions were conducted between August 24th and August 25th. For each unit listed on each of the three booking websites, we attempted to extract the following data:

- Property Name
- Property Identification Number
- Property Description
- Island
- Area
- Property Type
- Number of Bedrooms
- Number of Bathrooms
- Number of Guests unit Accommodates
- Nightly Rate
- Property Image
- Listing URL
- Host Name or Operator

The data extracted from each booking website were exported into an Excel file for processing.

Housing Data

Housing data for all islands was obtained from the U.S. Census Bureau's 2010 Census data.

Data Processing

The data in the Excel files were sorted by location. The first screening for duplicate listings was based on unique property codes, where possible. All three of the websites either assign unique numbers to each listing or had a unique number in other parts of the data. Next, duplicated property names were identified for detailed investigation. Our review of the data indicated that, while some of the duplicated property names represented multiple listings for a property within a booking site, many of the duplicated names did not. It appears that some vacation rental managers use the same property name for multiple vacation rentals, often promoting a promotional rate or offer such as "Free Rental Car with Booking." In many cases these were determined to be distinct properties because of the differences in other information such as price or number of bedrooms. For listings with a high degree of duplicated information, we reviewed the web pages of the listings in question to view the property photos.

Next, we de-duped the data across the three booking websites to the extent possible. The first step was to screen for identical property names across multiple booking sites. Next, we cross checked between booking sites based on unique identifiers such as unit numbers or address. This method is limited by the availability of unique location identifiers in the extracted data.

Most of the duplicate listings identified and eliminated in this process were properties that were listed on more than one of the three websites.

Despite the limitations of the process, we were able to identify and eliminate approximately 10,000 duplicate listings from the data set.

Data Cleaning

To allow the data to be analyzed by geographical areas consistent with the Visitor Plant Inventory data, we assigned zip codes to listings that did not include zip code data. In 2017, none of the three websites used for the provided zip code. In most instances this entailed assigning a zip code based on the area data extracted for each listing. The data extracted for some listings did not allow for identification of the property's geographic location, which necessitated reviewing the listing web pages to determine the property's location.

DEFINITIONS: Individually Advertised Units In Hawai‘i

Type of Units

An individual property may include more than one type of unit. If a property has more than one unit type, the majority unit type was used to determine the property type for the purposes of this report. Units were categorized as follows:

Bed & Breakfast (B&B): A lodging facility with a limited number of guest units, available for short-term rental. Services include breakfast in the daily rental rate. Typical bed and breakfast facilities may be small, quaint inns or family homes.

Vacation Rental Unit (VRU): An individual vacation rental unit available for visitor use on a short-term basis (30 days or less). VRs usually include kitchens, laundry facilities, and parking garages. Services are very limited although some may include some housekeeping service.

- **Vacation Rental in a Condominium Hotel (VR-Condo):** A condominium hotel unit available for visitor use on a short-term basis. VR-Condos are not rented or managed by the condominium hotel management, but are available through individual owners, property managers, or Internet agencies.
- **Vacation Rental House (VR-House):** A single-family dwelling property available for visitor use on a short-term basis. May be a house, townhouse, duplex, multiplex, cabin, villa or cottage, where the owner does not reside on the property.

Private Room: Accommodations where a visitor rents a private room for sleeping, but share common areas such as kitchen, livingroom, or bathroom with others. The host is the main resident.

Shared Room: Accommodations where a visitor share the entire space with others and do not have a private room to themselves. The host is the main resident.

Other: Includes lodges, inns, or any other form of property not included in the above definitions.

Class of Units

The Visitor Plant Inventory survey also included questions about the class of units at each property. The subsequent tables show the percent of each class of units available by island. Units were classified as follows:

Class	Price Range (Rack Rate)
Budget	Up to \$100 per night
Standard	\$101 to \$250 per night
Deluxe	\$251 to \$500 per night
Luxury	Over \$500 per night