



June 2020 Hawaii Vacation Rental Performance Report

In June 2020, the total monthly supply of statewide vacation rentals was 339,400 unit nights (-61.5%) and monthly demand was 46,700 unit nights (-92.8%), resulting in an average monthly unit occupancy of 13.8 percent (-59.8 percentage points) (Figure 1).

In comparison, Hawaii's hotels were 15.6 percent occupied in June 2020. It is important to note that unlike hotels, condominium hotels, timeshare resorts and vacation rental units are not necessarily available year-round or each day of the month and often accommodate a larger number of guests than traditional hotel rooms. The unit average daily rate (ADR) for vacation rental units statewide in June was \$207, which was higher than the ADR for hotels (\$162).

Vacation rentals were not on the state's list of essential businesses at the beginning of June. In Governor David Ige's Ninth Supplementary Proclamation, signed on June 10, host responsibility was added, which means that hosts are responsible for ensuring their guest(s) abides by the state's mandatory 14-day self-quarantine. The county mayors then enacted their own rules regarding short-term rentals. On O'ahu, short-term rentals (rented for less than 30 days) were not allowed to operate during June. For Hawaii Island, Kauai and Maui County, legal short-term rentals were allowed to operate as long as they were not being used as a quarantine location.

Also in June, the majority of flights to Hawaii were cancelled because of COVID-19. As of March 26, all passengers arriving from out-of-state were required to abide by the self-quarantine. The quarantine order was expanded on April 1 to include interisland travelers; the interisland quarantine ended on June 15.

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

Island Highlights

In June, O'ahu had the largest vacation rental supply of all four counties with 110,700 unit nights (-62.9%). Unit demand was 12,200 unit nights (-94.5%), resulting in 11.0 percent occupancy (-63.9 percentage points) and an ADR of \$155 (-46.8%). O'ahu hotels were 15.4 percent occupied with an ADR of \$164.

Maui County vacation rental supply in June was 106,900 unit nights, which was a decrease of 60.5 percent compared to a year ago. Unit demand was 12,200 unit nights (-94.2%), resulting in 11.4 percent occupancy (-66.4 percentage points) with an ADR of \$245 (-37.1%). Maui County hotels were 7.2 percent occupied with an ADR of \$218.

There were 83,100 available unit nights (-58.6%) on the island of Hawai'i in June. Unit demand was 13,400 unit nights (-89.7%), resulting in 16.1 percent occupancy (-48.5 percentage points) with an ADR of \$166 (-42.7%). Hawai'i Island hotels were 26.9 percent occupied with an ADR of \$139.

Kaua'i had the fewest number of available unit nights in June at 38,700 (-65.1%). Unit demand was 9,000 unit nights (-89.4%), resulting in 23.2 percent occupancy (-52.7 percentage points) with an ADR of \$288 (-38.7%). Kaua'i hotels were 19.6 percent occupied with an ADR of \$149.

Tables of vacation rental performance statistics, including data presented in the report are available for viewing online at:

<https://www.hawaiitourismauthority.org/research/infrastructure-research/>

About the Hawai'i Vacation Rental Performance Report

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

For June 2020, the report included data for 14,604 units, representing 25,479 bedrooms in the Hawaiian Islands.

Figure 1: Hawai'i Vacation Rental Performance June 2020

	Unit Supply			Unit Demand			Unit Occupancy %			Unit Average Daily Rate		
	2020	2019	% Change	2020	2019	% Change	2020	2019	Percentage Pt. Change	2020	2019	% Change
State of Hawai'i	339,441	880,804	-61.5%	46,719	647,986	-92.8%	13.8%	73.6%	-59.8%	\$206.95	\$345.59	-40.1%
O'ahu	110,668	298,527	-62.9%	12,196	223,701	-94.5%	11.0%	74.9%	-63.9%	\$155.11	\$291.36	-46.8%
Waikīkī	56,957	124,026	-54.1%	7,079	96,428	-92.7%	12.4%	77.7%	-65.3%	\$125.84	\$268.26	-53.1%
Maui County	106,907	270,419	-60.5%	12,187	210,266	-94.2%	11.4%	77.8%	-66.4%	\$244.62	\$388.67	-37.1%
Wailea/Kīhei	46,235	132,776	-65.2%	4,777	104,446	-95.4%	10.3%	78.7%	-68.3%	\$207.31	\$367.72	-43.6%
Lahaina/Kā'anapali/ Nāpili/Kapalua	46,941	104,619	-55.1%	5,584	82,174	-93.2%	11.9%	78.5%	-66.7%	\$294.49	\$440.57	-33.2%
Island of Hawai'i	83,126	200,852	-58.6%	13,367	129,793	-89.7%	16.1%	64.6%	-48.5%	\$165.55	\$288.96	-42.7%
Kona	37,185	92,465	-59.8%	6,273	63,125	-90.1%	16.9%	68.3%	-51.4%	\$151.86	\$258.41	-41.2%
Hilo/Honoka'a	18,945	46,215	-59.0%	3,494	27,291	-87.2%	18.4%	59.1%	-40.6%	\$105.45	\$165.07	-36.1%
Kaua'i	38,740	111,006	-65.1%	8,969	84,226	-89.4%	23.2%	75.9%	-52.7%	\$287.92	\$469.31	-38.7%

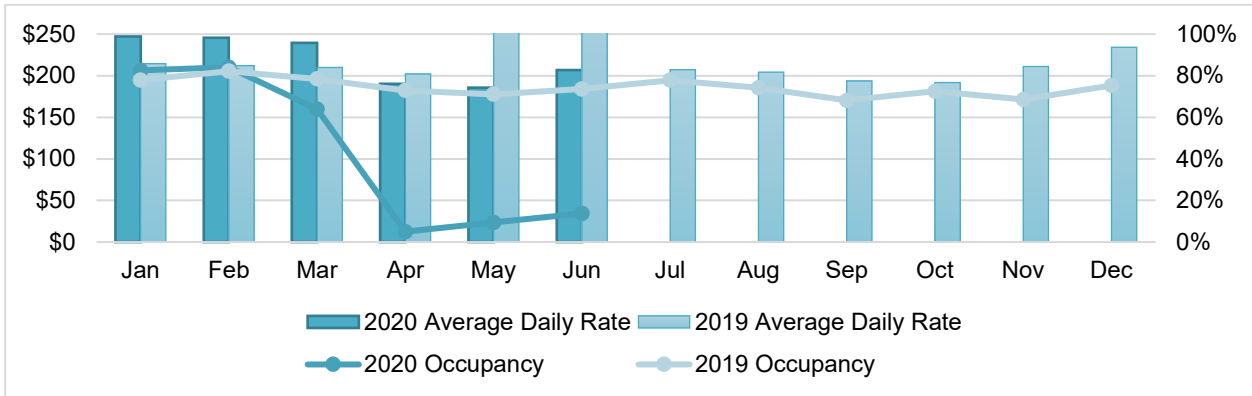
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Figure 2: Hawai'i Vacation Rental Performance Year-to-Date June 2020

	Unit Supply			Unit Demand			Unit Occupancy %			Unit Average Daily Rate		
	2020	2019	% Change	2020	2019	% Change	2020	2019	Percentage Pt. Change	2020	2019	% Change
State of Hawai'i	3,389,649	4,780,820	-29.1%	1,928,610	3,611,323	-46.6%	56.9%	75.5%	-24.7%	\$241.79	\$258.00	-6.3%
O'ahu	1,039,405	1,655,340	-37.2%	528,188	1,236,960	-57.3%	50.8%	74.7%	-32.0%	\$183.22	\$205.69	-10.9%
Waikīkī	525,782	661,584	-20.5%	275,893	514,854	-46.4%	52.5%	77.8%	-32.6%	\$157.41	\$191.78	-17.9%
Maui County	1,093,896	1,401,344	-21.9%	656,501	1,127,392	-41.8%	60.0%	80.5%	-25.4%	\$306.43	\$316.71	-3.2%
Wailea/Kīhei	483,072	665,248	-27.4%	306,670	537,160	-42.9%	63.5%	80.7%	-21.4%	\$304.39	\$310.80	-2.1%
Lahaina/Kā'anapali/ Nāpili/Kapalua	470,934	553,420	-14.9%	271,395	447,987	-39.4%	57.6%	80.9%	-28.8%	\$335.20	\$350.98	-4.5%
Island of Hawai'i	796,840	1,118,449	-28.8%	463,493	764,847	-39.4%	58.2%	68.4%	-14.9%	\$181.00	\$205.12	-11.8%
Kona	367,143	510,824	-28.1%	229,769	377,326	-39.1%	62.6%	73.9%	-15.3%	\$161.75	\$180.54	-10.4%
Hilo/Honoka'a	187,372	269,256	-30.4%	97,341	163,846	-40.6%	52.0%	60.9%	-14.6%	\$102.74	\$118.75	-13.5%
Kaua'i	459,508	605,687	-24.1%	280,428	482,124	-41.8%	61.0%	79.6%	-23.3%	\$301.26	\$338.82	-11.1%

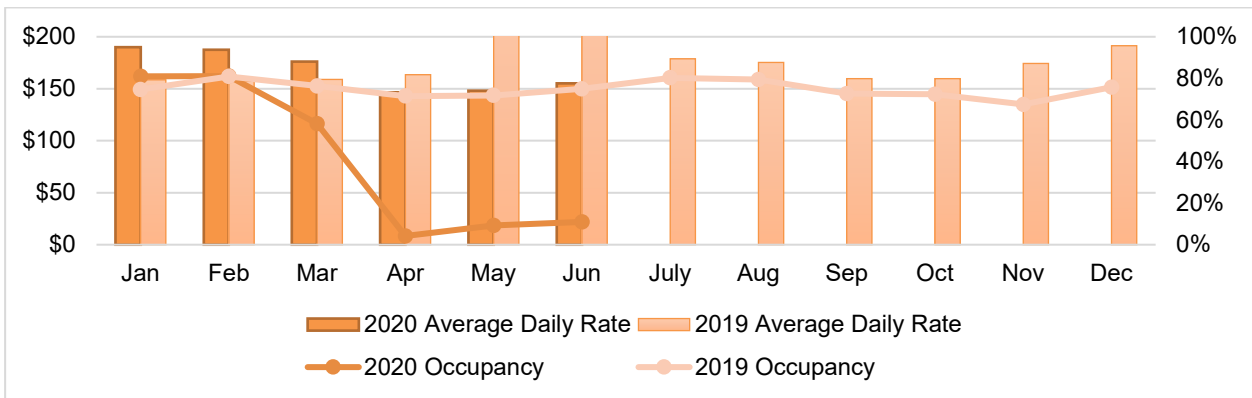
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Figure 3: Monthly State of Hawai'i Vacation Rental Performance - 2020 vs. 2019



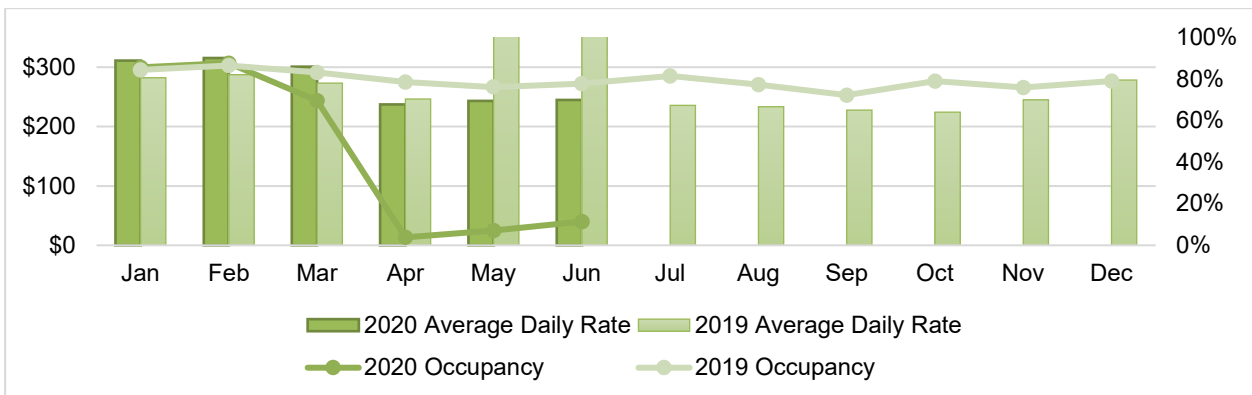
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Figure 4: Monthly O'ahu Vacation Rental Performance - 2020 vs. 2019



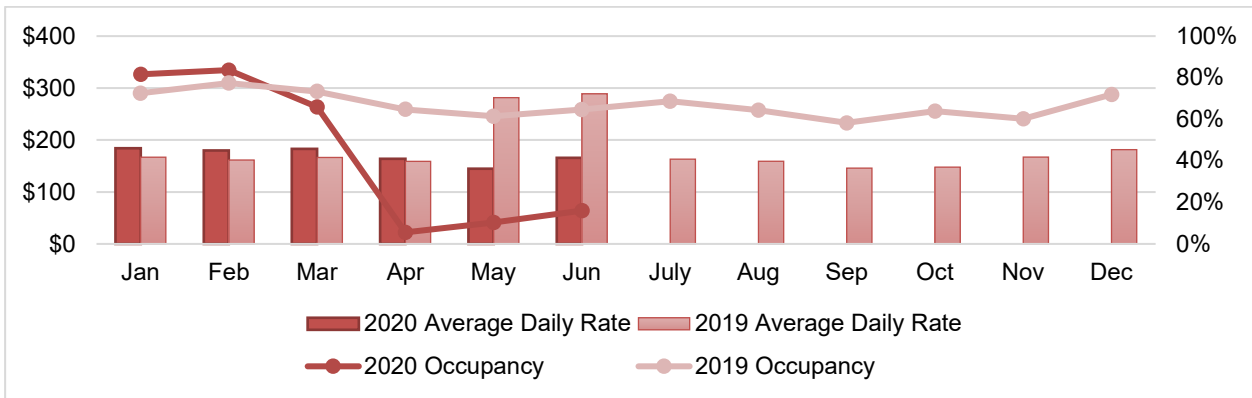
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Figure 5: Monthly Maui County Vacation Rental Performance - 2020 vs. 2019



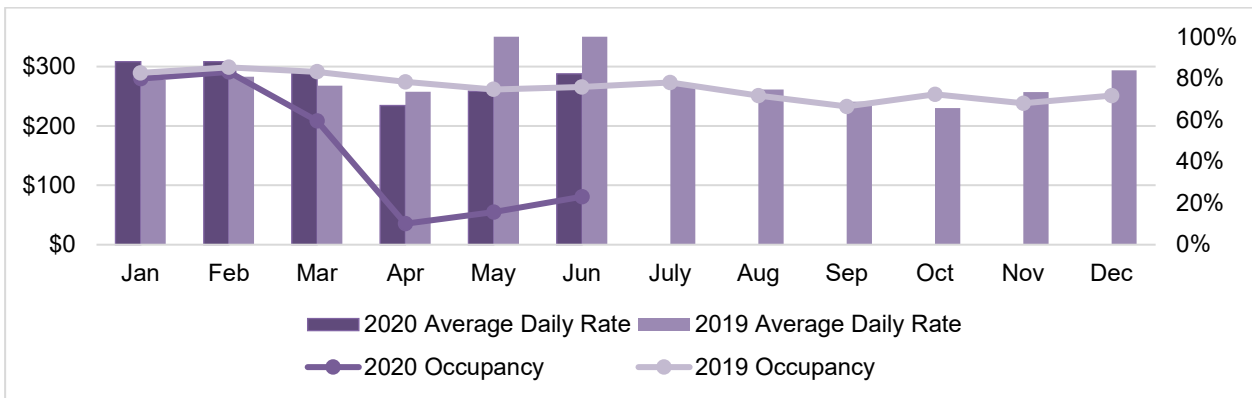
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Figure 6: Monthly Island of Hawai'i Vacation Rental Performance - 2020 vs. 2019



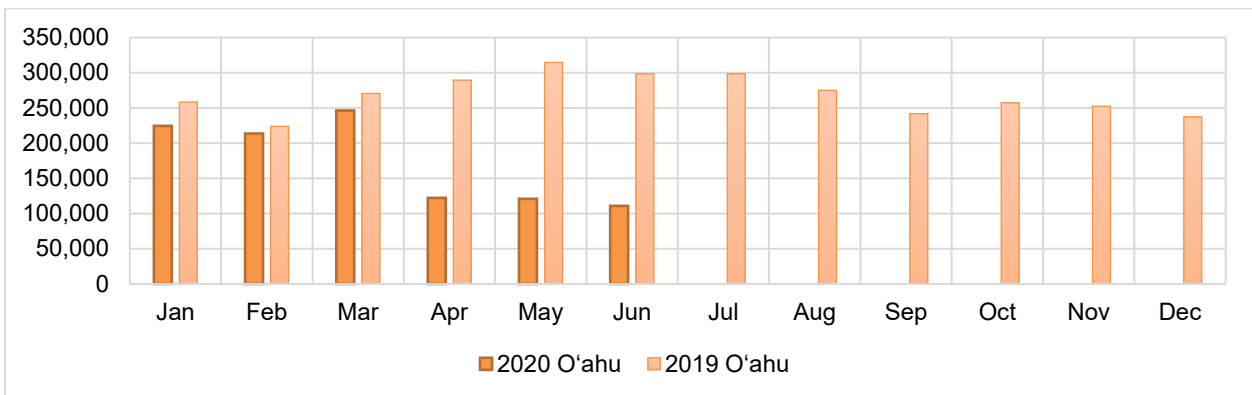
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Figure 7: Monthly Kaua'i Vacation Rental Performance - 2020 vs. 2019



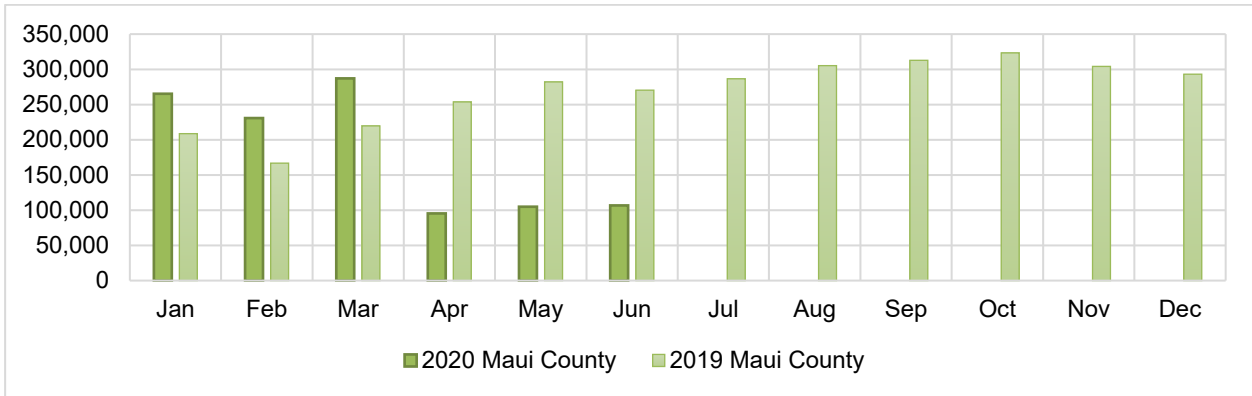
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Figure 8: Monthly O'ahu Unit Night Supply - 2020 vs. 2019



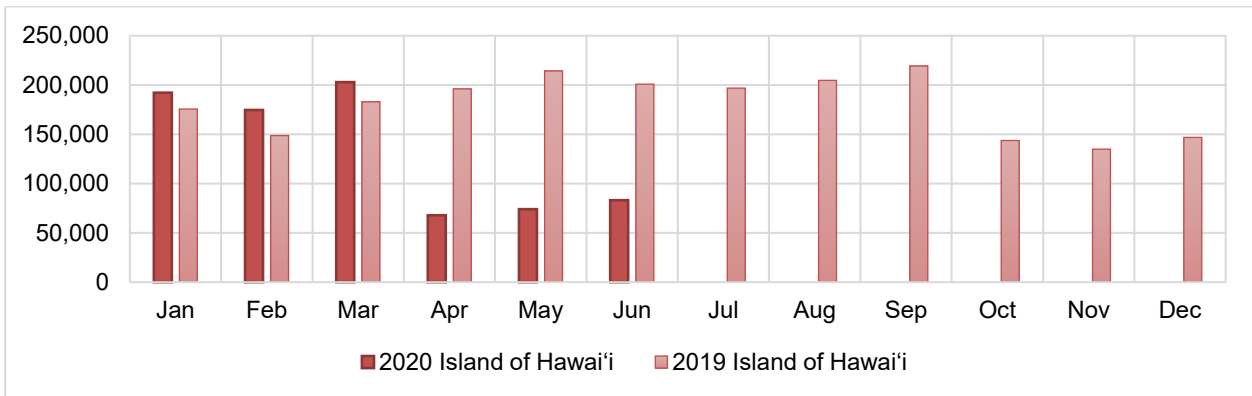
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Figure 9: Monthly Maui County Unit Night Supply - 2020 vs. 2019



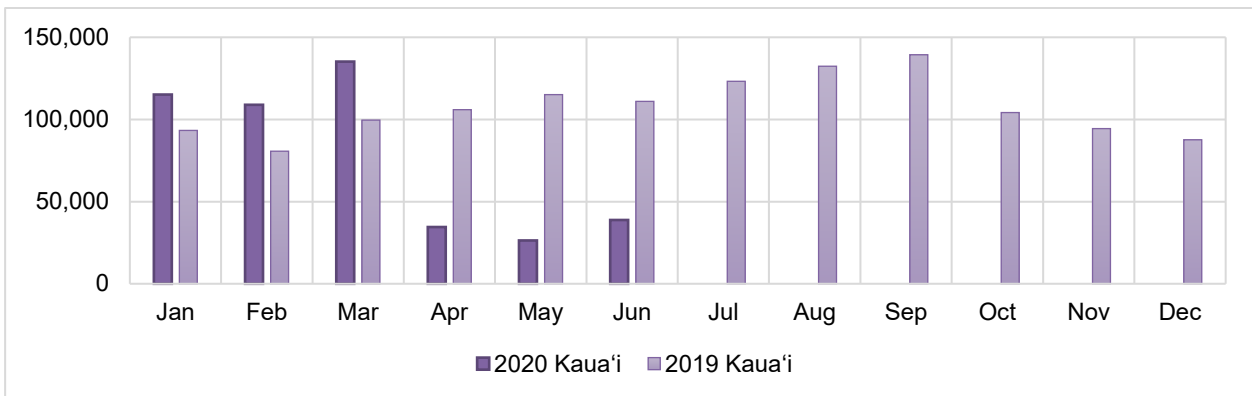
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Figure 10: Monthly Island of Hawai'i Unit Night Supply - 2020 vs. 2019



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Figure 11: Monthly Kaua'i Unit Night Supply - 2020 vs. 2019



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