



April 2020 Hawai'i Hotel Performance Report

In April 2020, Hawai'i hotels statewide reported dramatic declines in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to April 2019 due to the COVID-19 pandemic.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority's (HTA) Tourism Research Division, statewide RevPAR decreased to \$12 (-94.5%), ADR fell to \$131 (-51.8%), and occupancy declined to 8.9 percent (-69.0 percentage points) (Figure 1) in April.

The report's findings utilized data compiled by STR, Inc., which conducts the largest and most comprehensive survey of hotel properties in the Hawaiian Islands.

In April, Hawai'i hotel room revenues statewide fell by 97.0 percent to \$10.4 million. Room supply was 45.4 percent lower year-over-year (887,200 room nights) and room demand dwindled to 79,100 room nights (-93.7%) (Figure 2). Many properties closed or reduced operations in April. Since March 26, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine. The quarantine order was expanded on April 1 to include interisland travelers.

All classes of Hawai'i hotel properties statewide reported lower RevPAR, ADR and occupancy in April compared to a year ago. Performance data for Luxury Class properties were not available for April due to property closures.

Maui County hotels reported RevPAR at \$13 (-95.6%), with declines in both ADR to \$121 (-68.8%) and occupancy of 11.0 percent (-67.9 percentage points) in April. Data for the month of April was not available for Maui's luxury resort region of Wailea. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$4 (-98.3%), ADR of \$90 (-71.9%), and occupancy at 4.6 percent (-73.6 percentage points).

O'ahu hotels reported a 93.8 percent drop in RevPAR to \$11 in April. ADR decreased to \$142 (-37.9%) and occupancy declined to 8.0 percent (-71.9 percentage points). Waikīkī hotels earned \$8 (-95.7%) in RevPAR with ADR at \$141 (-36.7%) and occupancy of 5.4 percent (-74.5 percentage points).

Hotels on the island of Hawai'i earned RevPAR of \$13 (-93.1%) in April, with declines in both occupancy (12.4 percent, -62.3 percentage points) and ADR (\$107, -58.8%). Properties on the Kohala Coast reported declines in RevPAR, ADR and occupancy in April.

Kaua'i hotels' RevPAR fell to \$9 (-94.8%) in April, with lower ADR (\$131, -50.9%) and occupancy (7.0 percent, -59.6 percentage points).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaii-tourismauthority.org/research/infrastructure-research/>

About the Hawai'i Hotel Performance Report

The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i. The survey generally excludes properties with under 20 lodging units, such as small bed and breakfasts, youth hostels, single-family vacation rentals, cottages, individually rented vacation condominiums and sold timeshare units no longer available for hotel use. The data has been weighted both geographically and by class of property to compensate for any over and/or under representation of hotel survey participants by location and type. For April, the survey included 87 properties representing 22,929 rooms, or 42.7 percent of all lodging properties and 77.5 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels.

Figure 1: Hawai'i Hotel Performance April 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	8.9%	78.0%	-69.0%	\$131.16	\$272.33	-51.8%	\$11.70	\$212.28	-94.5%
Luxury Class	NA	76.3%	NA	NA	\$551.31	NA	NA	\$420.42	NA
Upper Upscale Class	4.6%	78.8%	-74.2%	\$156.03	\$271.85	-42.6%	\$7.11	\$214.14	-96.7%
Upscale Class	7.6%	76.1%	-68.5%	\$147.47	\$198.57	-25.7%	\$11.19	\$151.13	-92.6%
Upper Midscale Class	13.4%	78.8%	-65.4%	\$127.63	\$152.81	-16.5%	\$17.06	\$120.41	-85.8%
Midscale & Economy Class	22.3%	80.9%	-58.6%	\$92.28	\$161.41	-42.8%	\$20.58	\$130.55	-84.2%
O'ahu	8.0%	79.9%	-71.9%	\$141.62	\$228.06	-37.9%	\$11.38	\$182.27	-93.8%
Waikiki	5.4%	80.0%	-74.5%	\$140.73	\$222.37	-36.7%	\$7.65	\$177.85	-95.7%
Other O'ahu	21.1%	79.6%	-58.4%	\$142.76	\$262.65	-45.6%	\$30.18	\$208.99	-85.6%
O'ahu Luxury	NA	68.9%	NA	NA	\$479.91	NA	NA	\$330.66	NA
O'ahu Upper Upscale	3.8%	81.4%	-77.6%	\$161.95	\$253.05	-36.0%	\$6.10	\$205.87	-97.0%
O'ahu Upscale	9.8%	81.3%	-71.4%	\$162.31	\$186.12	-12.8%	\$15.95	\$151.27	-89.5%
O'ahu Upper Midscale	10.7%	78.9%	-68.2%	\$132.14	\$146.46	-9.8%	\$14.10	\$115.50	-87.8%
O'ahu Midscale & Economy	25.1%	84.2%	-59.1%	\$87.53	\$121.40	-27.9%	\$21.96	\$102.20	-78.5%
Maui County	11.0%	78.9%	-67.9%	\$120.68	\$387.16	-68.8%	\$13.30	\$305.55	-95.6%
Wailea	NA	92.4%	NA	NA	\$606.10	NA	NA	\$560.29	NA
Lahaina/Kā'anapali/Kapalua	4.6%	78.3%	-73.6%	\$89.58	\$319.27	-71.9%	\$4.15	\$249.92	-98.3%
Other Maui County	18.5%	79.7%	-61.2%	\$129.83	\$472.21	-72.5%	\$24.04	\$376.55	-93.6%
Maui County Luxury	NA	83.1%	NA	NA	\$635.57	-100.0%	NA	\$528.22	NA
Maui County Upper Upscale & Upscale	3.5%	78.4%	-74.9%	\$187.61	\$304.50	-38.4%	\$6.51	\$238.74	-97.3%
Island of Hawai'i	12.4%	74.7%	-62.3%	\$107.06	\$259.70	-58.8%	\$13.30	\$193.99	-93.1%
Kohala Coast	NA	76.5%	NA	NA	\$373.55	NA	NA	\$285.72	NA
Kaua'i	7.0%	66.6%	-59.6%	\$130.88	\$266.81	-50.9%	\$9.16	\$177.78	-94.8%

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Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

Figure 2: Hawai'i Hotel Performance by Measure April 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	887.2	1,623.8	-45.4%	79.1	1,265.7	-93.7%	10.4	344.7	-97.0%
O'ahu	550.8	912.1	-39.6%	44.3	728.9	-93.9%	6.3	166.2	-96.2%
Waikiki	459.7	782.7	-41.3%	25.0	626.0	-96.0%	3.5	139.2	-97.5%
Maui County	154.2	381.8	-59.6%	17.0	301.3	-94.4%	2.1	116.7	-98.2%
Wailea	NA	65.8	NA	NA	60.8	NA	NA	36.9	NA
Lahaina/Kā'anapali/Kapalua	83.3	214.1	-61.1%	3.9	167.6	-97.7%	0.3	53.5	-99.4%
Island of Hawai'i	94.4	194.2	-51.4%	11.7	145.1	-91.9%	1.3	37.7	-96.7%
Kohala Coast	NA	90.0	NA	NA	68.8	NA	NA	25.7	NA
Kaua'i	87.7	135.7	-35.4%	6.1	90.4	-93.2%	0.8	24.1	-96.7%

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Figure 3: Hawai'i Hotel Performance Year-to-Date April 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	61.0%	80.0%	-19.0%	\$301.70	\$286.10	5.5%	\$183.99	\$228.76	-19.6%
Luxury Class	NA	75.9%	NA	NA	\$583.35	NA	NA	\$442.61	NA
Upper Upscale Class	60.8%	81.7%	-20.9%	\$297.25	\$281.03	5.8%	\$180.79	\$229.55	-21.2%
Upscale Class	59.8%	77.2%	-17.4%	\$231.48	\$215.39	7.5%	\$138.47	\$166.26	-16.7%
Upper Midscale Class	61.7%	82.7%	-21.1%	\$174.42	\$162.13	7.6%	\$107.56	\$134.12	-19.8%
Midscale & Economy Class	64.6%	82.7%	-18.2%	\$188.53	\$180.85	4.2%	\$121.71	\$149.58	-18.6%
O'ahu	61.2%	82.2%	-21.0%	\$240.55	\$232.89	3.3%	\$147.26	\$191.44	-23.1%
Waikiki	60.6%	82.4%	-21.8%	\$237.13	\$227.67	4.2%	\$143.63	\$187.53	-23.4%
Other O'ahu	64.9%	81.2%	-16.3%	\$258.69	\$264.97	-2.4%	\$167.91	\$215.07	-21.9%
O'ahu Luxury	NA	69.9%	NA	NA	\$493.32	NA	NA	\$344.80	NA
O'ahu Upper Upscale	58.9%	83.7%	-24.8%	\$261.82	\$255.76	2.4%	\$154.27	\$214.12	-28.0%
O'ahu Upscale	65.3%	82.0%	-16.8%	\$202.41	\$190.89	6.0%	\$132.17	\$156.62	-15.6%
O'ahu Upper Midscale	61.3%	83.0%	-21.6%	\$164.48	\$153.93	6.9%	\$100.85	\$127.70	-21.0%
O'ahu Midscale & Economy	71.3%	86.9%	-15.6%	\$136.15	\$130.04	4.7%	\$97.01	\$112.99	-14.1%
Maui County	61.2%	78.5%	-17.4%	\$457.68	\$420.38	8.9%	\$279.91	\$330.19	-15.2%
Wailea	NA	89.7%	NA	NA	\$636.66	NA	NA	\$571.05	NA
Lahaina/Kā'anapali/Kapalua	60.1%	77.6%	-17.5%	\$388.54	\$351.34	10.6%	\$233.58	\$272.64	-14.3%
Other Maui County	62.4%	79.8%	-17.3%	\$539.52	\$506.10	6.6%	\$336.85	\$403.64	-16.5%
Maui County Luxury	NA	81.0%	NA	NA	\$686.03	NA	NA	\$555.84	NA
Maui County Upper Upscale & Upscale	60.4%	78.4%	-18.0%	\$374.62	\$333.30	12.4%	\$226.35	\$261.27	-13.4%
Island of Hawai'i	62.2%	77.9%	-15.7%	\$298.31	\$278.26	7.2%	\$185.59	\$216.84	-14.4%
Kohala Coast	NA	78.6%	NA	NA	\$394.29	NA	NA	\$309.91	-100.0%
Kaua'i	57.1%	71.8%	-14.7%	\$311.74	\$294.40	5.9%	\$177.97	\$211.34	-15.8%

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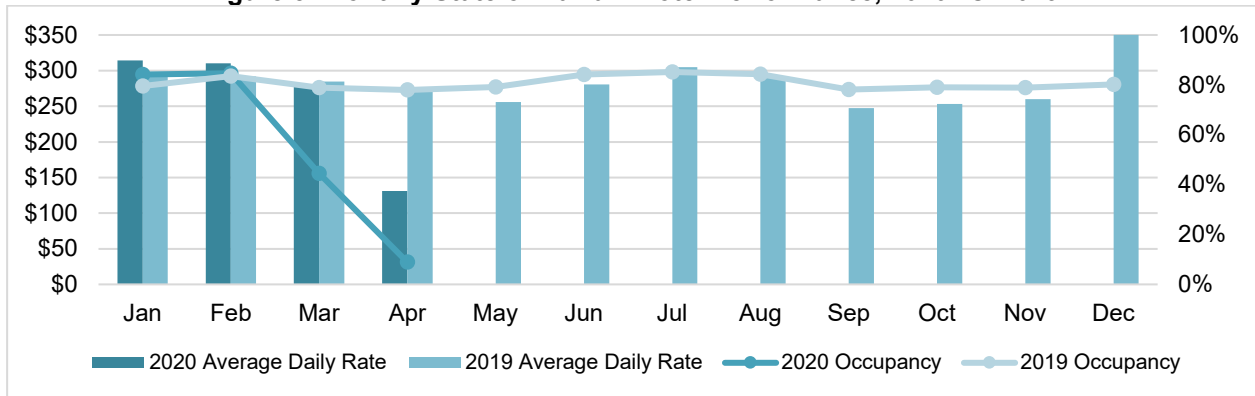
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date April 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	5,723.3	6,496.1	-11.9%	3,490.3	5,194.1	-32.8%	1,053.0	1,486.0	-29.1%
O'ahu	3,302.0	3,648.2	-9.5%	2,021.4	2,998.8	-32.6%	486.2	698.4	-30.4%
Waikiki	2,808.5	3,130.7	-10.3%	1,701.1	2,578.7	-34.0%	403.4	587.1	-31.3%
Maui County	1,282.7	1,527.1	-16.0%	784.4	1,199.5	-34.6%	359.0	504.2	-28.8%
Wailea	NA	263.3	NA	NA	236.1	NA	NA	150.3	NA
Lahaina/Kā'anapali/Kapalua	707.3	856.2	-17.4%	425.2	664.4	-36.0%	165.2	233.4	-29.2%
Island of Hawai'i	672.2	776.8	-13.5%	418.2	605.3	-30.9%	124.8	168.4	-25.9%
Kohala Coast	NA	360.0	NA	NA	283.0	NA	NA	111.6	NA
Kaua'i	466.4	543.9	-14.3%	266.3	390.5	-31.8%	83.0	115.0	-27.8%

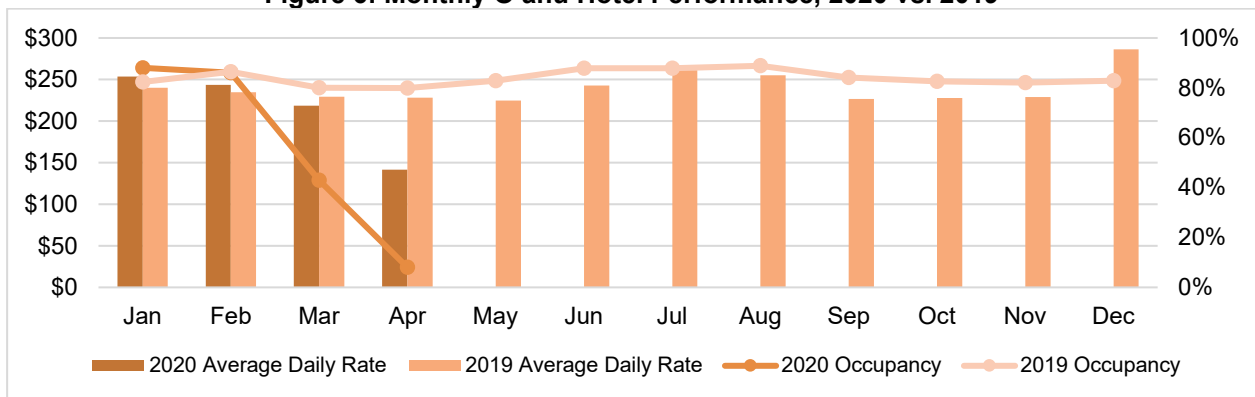
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



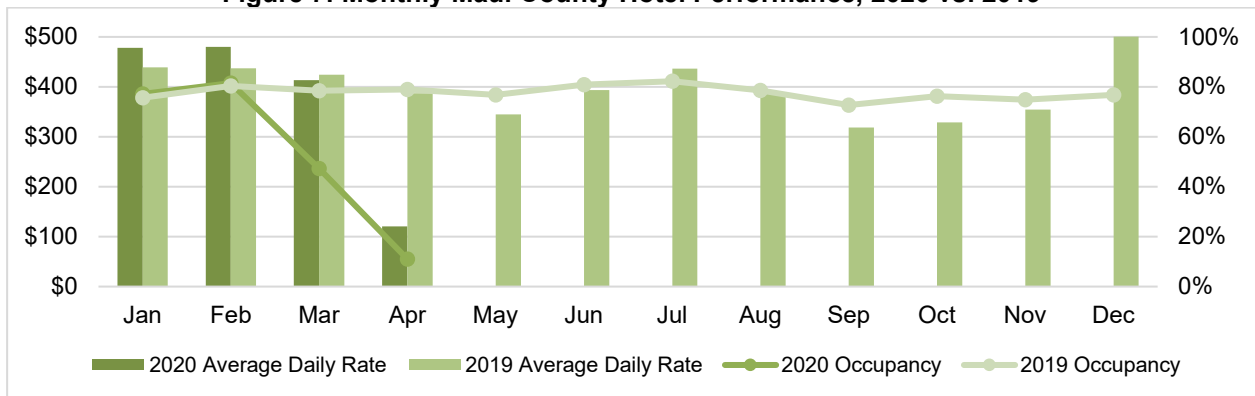
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Figure 6: Monthly O'ahu Hotel Performance, 2020 vs. 2019



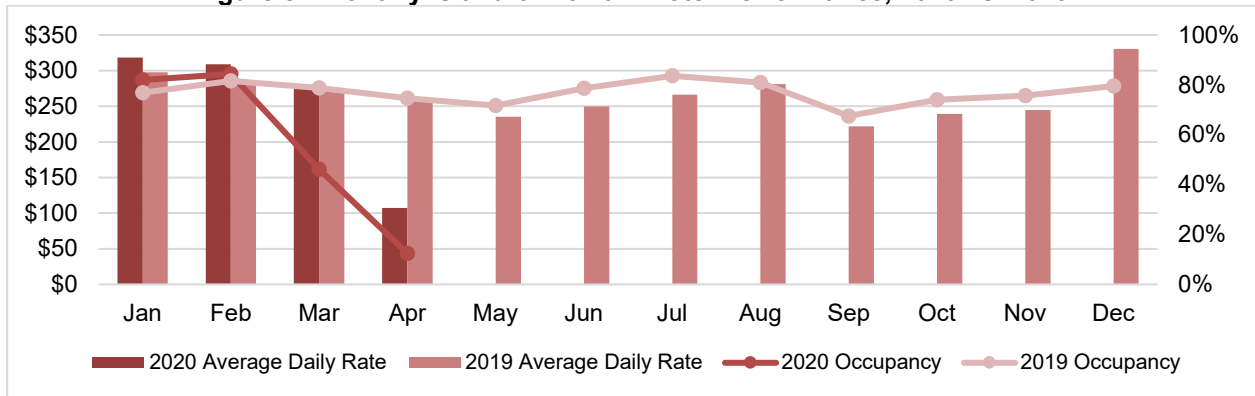
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Figure 7: Monthly Maui County Hotel Performance, 2020 vs. 2019



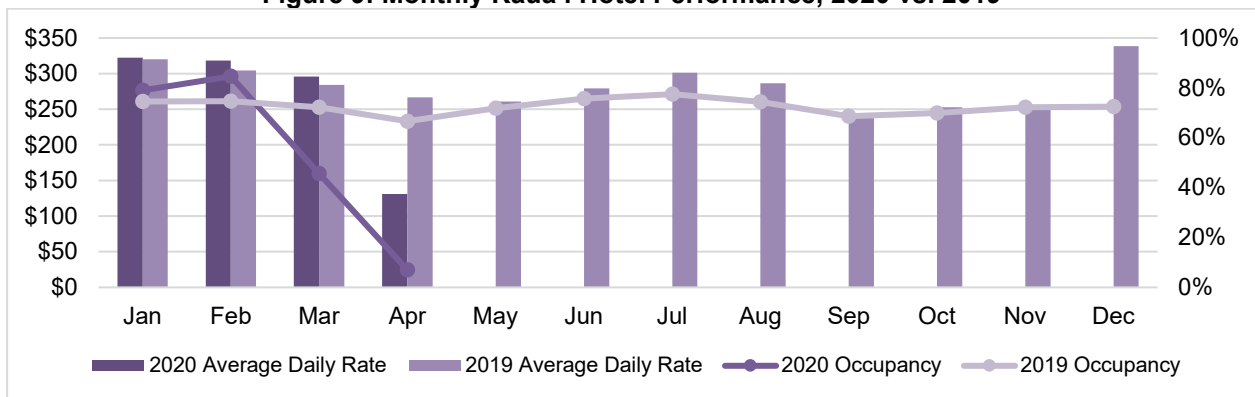
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



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Figure 9: Monthly Kaua'i Hotel Performance, 2020 vs. 2019



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