



May 2020 Hawaii Hotel Performance Report

In May 2020, Hawaii hotels statewide continued to report substantially lower revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to May 2019 due to the COVID-19 pandemic.

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority's (HTA) Tourism Research Division, statewide RevPAR decreased to \$18 (-91.1%), ADR fell to \$127 (-50.4%), and occupancy declined to 14.2 percent (-64.9 percentage points) (Figure 1) in May.

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 May, Hawaii hotel room revenues statewide fell by 95.5 percent to \$15.4 million. Room supply was 48.9 percent lower year-over-year (819,800 room nights) and room demand dropped to 121,300 room nights (-90.8%) (Figure 2). Many properties closed or reduced operations starting in April 2020. 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 Hawaii hotel properties statewide reported lower RevPAR, ADR and occupancy in May compared to a year ago. Performance data for Luxury Class properties were not available for May due to property closures.

Maui County hotels reported RevPAR at \$15 (-94.5%), with declines in both ADR to \$117 (-66.4%) and occupancy of 12.6 percent (-63.7 percentage points) in May. Data for the month of May was not available for Maui's luxury resort region of Wailea. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$4 (-98.1%), ADR of \$70 (-76.1%), and occupancy at 5.8 percent (-69.5 percentage points).

O'ahu hotels reported a 90.4 percent drop in RevPAR to \$18 in May. ADR decreased to \$136 (-39.2%) and occupancy declined to 13.1 percent (-69.9 percentage points). Waikīkī hotels earned \$12 (-93.6%) in RevPAR with ADR at \$129 (-41.7%) and occupancy of 9.2 percent (-74.3 percentage points).

Hotels on the island of Hawaii earned RevPAR of \$22 (-86.7%) in May, with declines in both occupancy (19.3 percent, -52.4 percentage points) and ADR (\$116, -50.5%). Data for the month of May was not available for the Kohala Coast.

Kaua'i hotels' RevPAR fell to \$19 (-89.9%) in May, with lower ADR (\$125, -51.8%) and occupancy (14.9 percent, -56.3 percentage points).

Tables of hotel 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 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 May, the survey included 81 properties representing 18,306 rooms, or 34.1 percent of all lodging properties and 66.3 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 May 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	14.2%	79.0%	-64.9%	\$126.72	\$255.47	-50.4%	\$17.95	\$201.91	-91.1%
Luxury Class	5.2%	74.2%	-68.9%	\$252.88	\$486.75	-48.0%	\$13.18	\$360.98	-96.3%
Upper Upscale Class	10.6%	80.2%	-69.5%	\$147.93	\$261.91	-43.5%	\$15.74	\$209.98	-92.5%
Upscale Class	9.5%	76.9%	-67.4%	\$136.34	\$193.20	-29.4%	\$12.96	\$148.58	-91.3%
Upper Midscale Class	19.2%	83.7%	-64.5%	\$126.58	\$152.87	-17.2%	\$24.28	\$127.96	-81.0%
Midscale & Economy Class	31.6%	81.6%	-50.0%	\$93.43	\$160.48	-41.8%	\$29.52	\$130.99	-77.5%
O'ahu	13.1%	82.9%	-69.9%	\$136.34	\$224.32	-39.2%	\$17.85	\$186.07	-90.4%
Waikiki	9.2%	83.5%	-74.3%	\$129.07	\$221.36	-41.7%	\$11.87	\$184.81	-93.6%
Other O'ahu	29.8%	79.7%	-49.8%	\$145.99	\$243.07	-39.9%	\$43.54	\$193.65	-77.5%
O'ahu Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
O'ahu Upper Upscale	8.4%	84.4%	-75.9%	\$163.24	\$251.51	-35.1%	\$13.78	\$212.24	-93.5%
O'ahu Upscale	13.6%	84.2%	-70.6%	\$160.34	\$187.40	-14.4%	\$21.75	\$157.80	-86.2%
O'ahu Upper Midscale	16.3%	84.3%	-67.9%	\$128.93	\$148.01	-12.9%	\$21.05	\$124.71	-83.1%
O'ahu Midscale & Economy	26.6%	86.8%	-60.2%	\$93.01	\$125.20	-25.7%	\$24.74	\$108.69	-77.2%
Maui County	12.6%	76.3%	-63.7%	\$116.19	\$345.33	-66.4%	\$14.60	\$263.37	-94.5%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	5.8%	75.4%	-69.5%	\$70.09	\$292.96	-76.1%	\$4.10	\$220.77	-98.1%
Other Maui County	22.8%	77.4%	-54.7%	\$134.14	\$410.38	-67.3%	\$30.52	\$317.74	-90.4%
Maui County Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
Maui County Upper Upscale & Upscale	5.4%	75.7%	-70.4%	\$137.15	\$280.28	-51.1%	\$7.35	\$212.26	-96.5%
Island of Hawai'i	19.3%	71.6%	-52.4%	\$115.97	\$234.44	-50.5%	\$22.35	\$167.94	-86.7%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	14.9%	71.2%	-56.3%	\$124.66	\$258.39	-51.8%	\$18.58	\$183.87	-89.9%

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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 May 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	856.4	1,676.1	-48.9%	121.3	1,324.7	-90.8%	15.4	338.4	-95.5%
O'ahu	443.4	940.7	-52.9%	58.0	780.3	-92.6%	7.9	175.0	-95.5%
Waikiki	359.7	807.0	-55.4%	33.1	673.8	-95.1%	4.3	149.1	-97.1%
Maui County	184.4	394.5	-53.3%	23.2	300.9	-92.3%	2.7	103.9	-97.4%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	111.1	221.2	-49.8%	6.5	166.7	-96.1%	0.5	48.8	-99.1%
Island of Hawai'i	138.0	200.7	-31.2%	26.6	143.7	-81.5%	3.1	33.7	-90.8%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	90.6	140.2	-35.4%	13.5	99.8	-86.5%	1.7	25.8	-93.5%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	54.6%	79.8%	-25.2%	\$295.76	\$279.88	5.7%	\$161.36	\$223.25	-27.7%
Luxury Class	54.8%	75.5%	-20.7%	\$617.33	\$563.88	9.5%	\$338.40	\$425.85	-20.5%
Upper Upscale Class	56.2%	81.4%	-25.2%	\$294.64	\$277.17	6.3%	\$165.58	\$225.54	-26.6%
Upscale Class	50.3%	77.1%	-26.8%	\$228.22	\$210.85	8.2%	\$114.90	\$162.63	-29.3%
Upper Midscale Class	54.6%	82.9%	-28.3%	\$171.62	\$160.21	7.1%	\$93.69	\$132.85	-29.5%
Midscale & Economy Class	58.4%	82.5%	-24.0%	\$178.99	\$176.71	1.3%	\$104.60	\$145.76	-28.2%
O'ahu	55.5%	82.4%	-26.9%	\$237.59	\$231.12	2.8%	\$131.84	\$190.34	-30.7%
Waikiki	54.7%	82.6%	-27.9%	\$235.01	\$226.36	3.8%	\$128.56	\$186.97	-31.2%
Other O'ahu	59.8%	80.9%	-21.0%	\$250.55	\$260.54	-3.8%	\$149.88	\$210.67	-28.9%
O'ahu Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
O'ahu Upper Upscale	54.6%	83.9%	-29.2%	\$260.53	\$254.88	2.2%	\$142.37	\$213.73	-33.4%
O'ahu Upscale	58.5%	82.5%	-24.0%	\$201.14	\$190.16	5.8%	\$117.70	\$156.86	-25.0%
O'ahu Upper Midscale	54.1%	83.2%	-29.2%	\$162.75	\$152.70	6.6%	\$87.98	\$127.09	-30.8%
O'ahu Midscale & Economy	63.8%	86.9%	-23.1%	\$133.13	\$129.05	3.2%	\$84.89	\$112.11	-24.3%
Maui County	54.6%	78.1%	-23.5%	\$447.48	\$405.33	10.4%	\$244.43	\$316.47	-22.8%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	52.0%	77.1%	-25.1%	\$383.12	\$339.63	12.8%	\$199.31	\$261.99	-23.9%
Other Maui County	58.0%	79.3%	-21.3%	\$521.54	\$486.91	7.1%	\$302.24	\$386.00	-21.7%
Maui County Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
Maui County Upper Upscale & Upscale	51.7%	77.8%	-26.2%	\$370.49	\$322.71	14.8%	\$191.38	\$251.21	-23.8%
Island of Hawai'i	53.1%	76.6%	-23.5%	\$287.48	\$269.85	6.5%	\$152.75	\$206.80	-26.1%
Kohala Coast	58.2%	77.1%	-18.9%	\$447.75	\$382.12	17.2%	\$260.81	\$294.62	-11.5%
Kaua'i	50.2%	71.7%	-21.4%	\$302.71	\$287.07	5.4%	\$152.04	\$205.71	-26.1%

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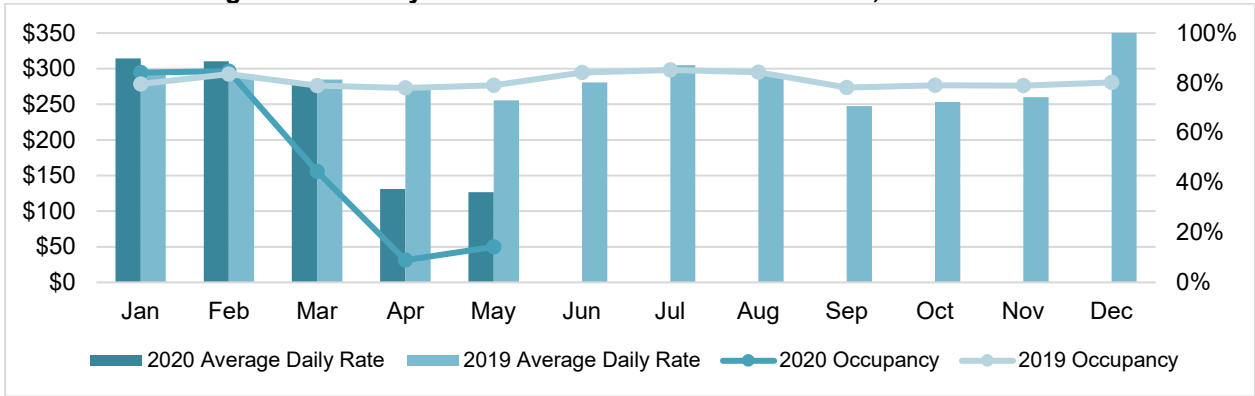
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	6,621.7	8,172.2	-19.0%	3,612.5	6,518.8	-44.6%	1,068.5	1,824.5	-41.4%
O'ahu	3,745.4	4,589.0	-18.4%	2,078.4	3,779.1	-45.0%	493.8	873.4	-43.5%
Waikiki	3,168.2	3,937.7	-19.5%	1,733.1	3,252.5	-46.7%	407.3	736.2	-44.7%
Maui County	1,480.0	1,921.6	-23.0%	808.4	1,500.4	-46.1%	361.7	608.1	-40.5%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	831.3	1,077.4	-22.8%	432.5	831.1	-48.0%	165.7	282.3	-41.3%
Island of Hawai'i	839.4	977.4	-14.1%	446.0	749.0	-40.5%	128.2	202.1	-36.6%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	557.0	684.2	-18.6%	279.8	490.3	-42.9%	84.7	140.7	-39.8%

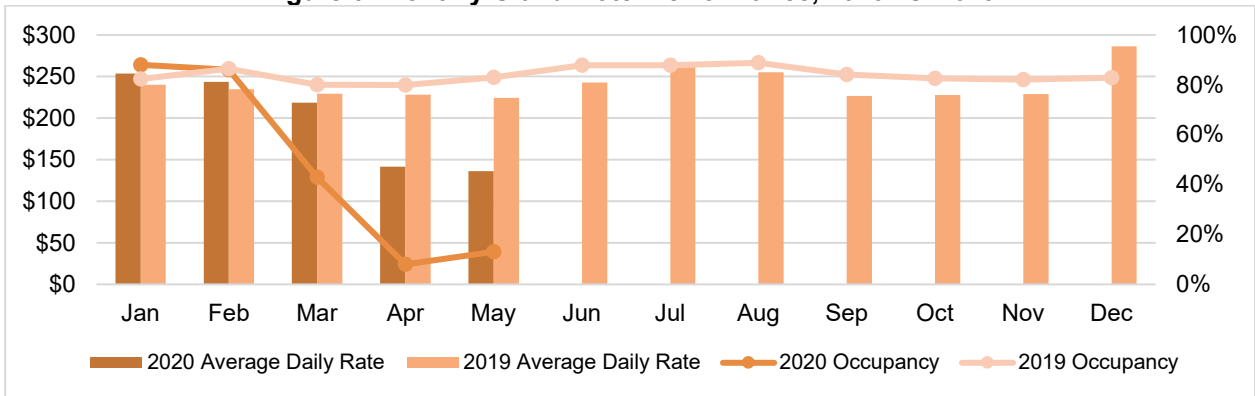
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



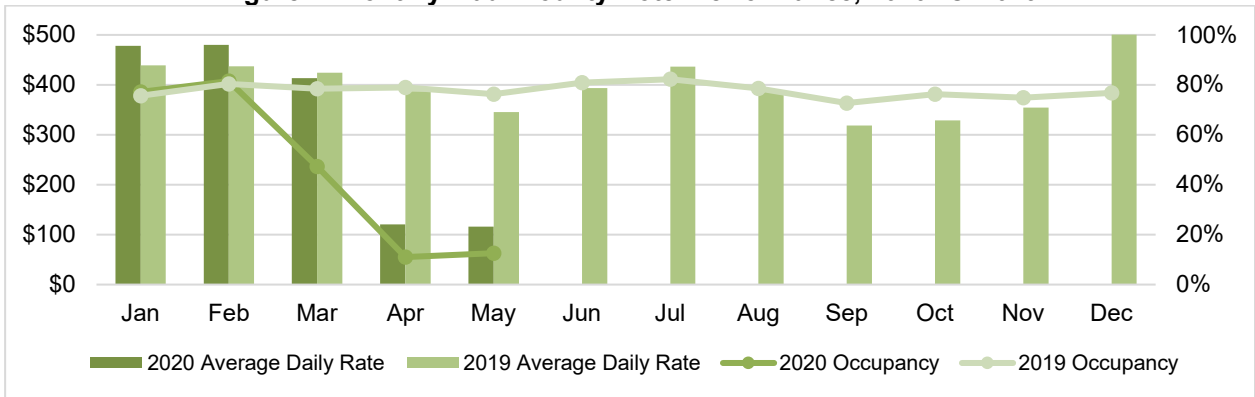
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Figure 6: Monthly O'ahu Hotel Performance, 2020 vs. 2019



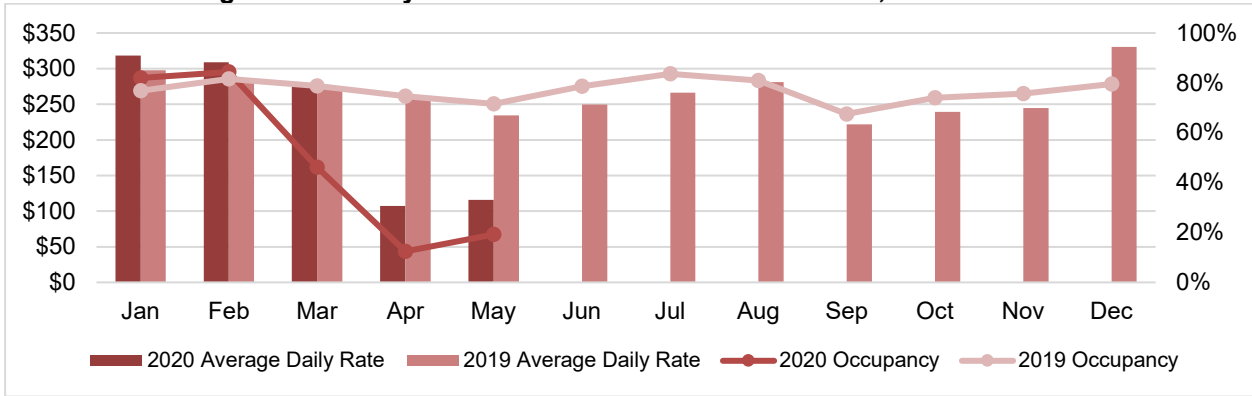
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Figure 7: Monthly Maui County Hotel Performance, 2020 vs. 2019



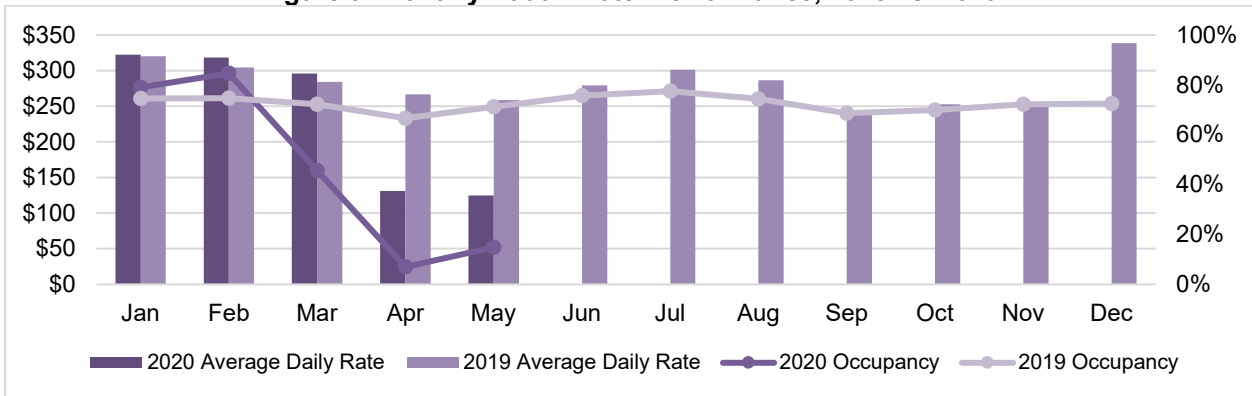
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Figure 8: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



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



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