



June 2020 Hawai'i Hotel Performance Report

In June 2020, Hawai'i hotels statewide reported substantial declines in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to June 2019 as tourism continued to be impacted significantly by the COVID-19 pandemic.

According to the *Hawai'i Hotel Performance Report* published by Hawai'i Tourism Authority's (HTA) Research Division, statewide RevPAR decreased to \$25 (-89.3%), ADR fell to \$162 (-42.4%), and occupancy declined to 15.6 percent (-68.3 percentage points) (Figure 1) in June.

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 June, Hawai'i hotel room revenues statewide fell by 94.2 percent to \$22.3 million. Room demand was 89.9 percent lower than the same period last year. Room supply decreased by 45.6 percent year-over-year (Figure 2). Many properties closed or reduced operations starting 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; the interisland quarantine ended on June 15.

All classes of Hawai'i hotel properties statewide reported RevPAR losses in June compared to a year ago. Luxury Class properties earned RevPAR of \$26 (-94.0%), with ADR of \$335 (-39.5%) and occupancy at 7.9 percent (-72.1 percentage points). Upper Midscale Class properties earned slightly higher RevPAR (\$29, -79.8%) than Luxury Class hotels due to comparatively higher occupancy at 18.6 percent (-67.9 percentage points).

All of Hawai'i's four island counties reported lower RevPAR and occupancy. Hotels on the island of Hawai'i led the state in June RevPAR at \$37 (-80.8%), with occupancy of 26.9 percent (-51.5 percentage points) and ADR at \$139 (-44.1%).

Maui County hotels had the lowest June RevPAR at \$16 (-95.1%), with ADR of \$218 (-44.7%) and occupancy at 7.2 percent (-73.5 percentage points).

O'ahu hotels reported \$25 (-88.2%) for RevPAR in June, with ADR at \$164 (-32.5%) and occupancy of 15.4 percent (-72.5 percentage points). Waikīkī hotels earned \$20 (-90.3%) in RevPAR with ADR at \$164 (-30.8%) and occupancy of 12.4 percent (-75.8 percentage points).

Kaua'i hotels earned RevPAR of \$29 (-86.0%) in June, with ADR at \$149 (-46.7%) and occupancy of 19.6 percent (-54.7 percentage points).

First Half of 2020

Through the first six months of 2020, Hawai'i hotels statewide reported modest ADR growth and lower occupancy, which resulted in lower RevPAR compared to the first half of 2019. Statewide RevPAR declined to \$144 (-35.9%), with ADR of \$291 (+3.9%) and occupancy of 49.7 percent (-30.8 percentage points) (Figure 8).

Year-to-date performance was the result of a strong first quarter countered by a very weak second quarter. In the first half of 2020, Hawai'i hotel room revenues fell by 50.6 percent to \$1.09 billion compared to the \$2.21 billion earned in the first half of 2019. There were approximately 2.2 million fewer available room nights (-22.9%) and approximately 4.1 million fewer occupied room nights (-52.4%) compared to a year ago (Figure 9). Many hotel properties across the state were closed or had rooms out of service due to COVID-19 impacts. Other properties were already closed for renovation or had rooms out of service for renovation.

All classes of Hawai'i hotel properties statewide reported lower RevPAR, higher ADR, and occupancy declines in the first half of 2020. Luxury Class properties reported RevPAR of \$317 (-26.0%), with ADR of \$615 (+9.4%) and occupancy of 51.6 percent (-24.7 percentage points). At the other end of the price scale, Midscale & Economy Class hotels reported RevPAR of \$94 (-35.2%), with ADR of \$175 (+0.02%) and occupancy of 53.4 percent (-29.0 percentage points).

Comparison to Top U.S. Markets

In comparison to top U.S. markets during the first half of 2020, the Hawaiian Islands earned the highest RevPAR at \$144 followed by the Miami/Hialeah market at \$126 (-27.1%) and San Francisco/San Mateo at \$98 (-52.7%) (Figure 10). Hawai'i also led the U.S. markets in ADR at \$291 followed by Miami/Hialeah and San Francisco/San Mateo (Figure 11). Miami/Hialeah topped the country in occupancy at 54.5 percent (-25.1 percentage points), followed by New York and Tampa/St. Petersburg, Florida (Figure 12). The Hawaiian Islands ranked eighth for occupancy.

Hotel Results for Hawai'i's Four Counties

Hotel properties in Hawai'i's four island counties all reported RevPAR decreases in the first half of 2020. Maui County hotels led the state overall in RevPAR at \$218 (-31.1%), with ADR at \$444 (+10.0%) and occupancy of 49.2 percent (-29.3 percentage points).

Kaua'i hotels earned RevPAR of \$135 (-34.4%), with ADR at \$294 (+2.8%) and occupancy of 46.1 percent (-26.0 percentage points).

Hotels on the island of Hawai'i reported a decline in RevPAR to \$139 (-32.0%), with ADR at \$277 (+4.2%) and occupancy of 50.2 percent (-26.7 percentage points).

O'ahu hotels earned RevPAR of \$118 (-39.1%), with ADR at \$235 (+0.8%) and occupancy of 50.3 percent (-32.9 percentage points).

Comparison to International Markets

When compared to international "sun and sea" destinations, Hawai'i's counties were in the upper half of the group for RevPAR in the first half of 2020. Hotels in the Maldives ranked highest in RevPAR at \$292 (-29.8%) followed by Maui County, the island of Hawai'i, Kaua'i, and O'ahu. (Figure 13). Data were not available for Aruba and French Polynesia.

The Maldives also led in ADR at \$744 (+25.3%) in the first half of 2020, followed by Maui County. Kaua'i, the island of Hawai'i, and O'ahu ranked fourth, fifth, and sixth, respectively (Figure 14).

O'ahu led in occupancy for sun and sea destinations in the first half of the year, followed by the island of Hawai'i, Maui County and Kaua'i (Figure 15).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiiauthority.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 June, the survey included 79 properties representing 19,200 rooms, or 35.8 percent of all lodging properties and 65.3 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 June 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	15.6%	83.9%	-68.3%	\$161.51	\$280.51	-42.4%	\$25.28	\$235.44	-89.3%
Luxury Class	7.9%	80.0%	-72.1%	\$335.33	\$553.86	-39.5%	\$26.47	\$443.10	-94.0%
Upper Upscale Class	15.4%	86.6%	-71.3%	\$173.99	\$281.87	-38.3%	\$26.72	\$244.19	-89.1%
Upscale Class	12.8%	81.2%	-68.4%	\$152.32	\$206.74	-26.3%	\$19.53	\$167.94	-88.4%
Upper Midscale Class	18.6%	86.5%	-67.9%	\$156.58	\$166.74	-6.1%	\$29.12	\$144.23	-79.8%
Midscale & Economy Class	NA	NA	NA	NA	NA	NA	NA	NA	NA
O'ahu	15.4%	87.9%	-72.5%	\$163.83	\$242.90	-32.5%	\$25.30	\$213.63	-88.2%
Waikiki	12.4%	88.2%	-75.8%	\$164.25	\$237.35	-30.8%	\$20.32	\$209.37	-90.3%
Other O'ahu	30.5%	86.4%	-55.8%	\$163.01	\$277.10	-41.2%	\$49.78	\$239.33	-79.2%
O'ahu Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
O'ahu Upper Upscale	13.4%	89.3%	-76.0%	\$180.77	\$268.33	-32.6%	\$24.15	\$239.72	-89.9%
O'ahu Upscale	16.1%	89.3%	-73.2%	\$167.20	\$198.72	-15.9%	\$26.87	\$177.48	-84.9%
O'ahu Upper Midscale	18.2%	87.2%	-69.0%	\$155.02	\$162.77	-4.8%	\$28.27	\$141.95	-80.1%
O'ahu Midscale & Economy	NA	NA	NA	NA	NA	NA	NA	NA	NA
Maui County	7.2%	80.6%	-73.5%	\$217.80	\$393.97	-44.7%	\$15.58	\$317.57	-95.1%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	2.9%	81.2%	-78.4%	\$66.02	\$332.40	-80.1%	\$1.90	\$270.05	-99.3%
Other Maui County	12.6%	79.8%	-67.2%	\$261.65	\$473.97	-44.8%	\$32.85	\$378.22	-91.3%
Maui County Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
Maui County Upper Upscale & Upscale	5.9%	81.0%	-75.1%	\$179.27	\$311.71	-42.5%	\$10.56	\$252.50	-95.8%
Island of Hawai'i	26.9%	78.4%	-51.5%	\$139.25	\$249.05	-44.1%	\$37.47	\$195.25	-80.8%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	19.6%	74.3%	-54.7%	\$149.40	\$280.48	-46.7%	\$29.25	\$208.42	-86.0%

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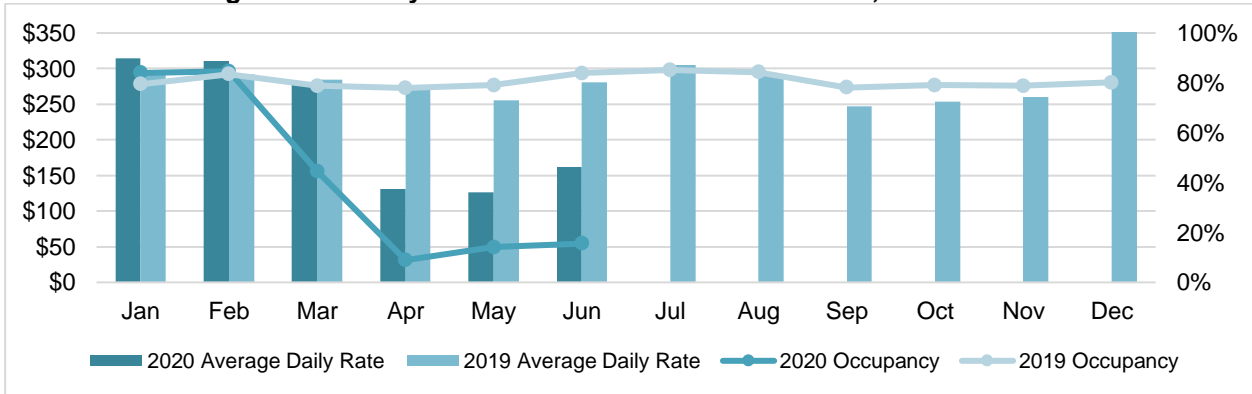
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	882.5	1,622.8	-45.6%	138.1	1,362.1	-89.9%	22.3	382.1	-94.2%
O'ahu	478.6	910.4	-47.4%	73.9	800.7	-90.8%	12.1	194.5	-93.8%
Waikiki	397.6	781.0	-49.1%	49.2	688.9	-92.9%	8.1	163.5	-95.1%
Maui County	192.7	381.8	-49.5%	13.8	307.7	-95.5%	3.0	121.2	-97.5%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	107.5	214.1	-49.8%	3.1	173.9	-98.2%	0.2	57.8	-99.6%
Island of Hawai'i	123.5	194.2	-36.4%	33.2	152.2	-78.2%	4.6	37.9	-87.8%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	87.7	136.4	-35.7%	17.2	101.4	-83.1%	2.6	28.4	-91.0%

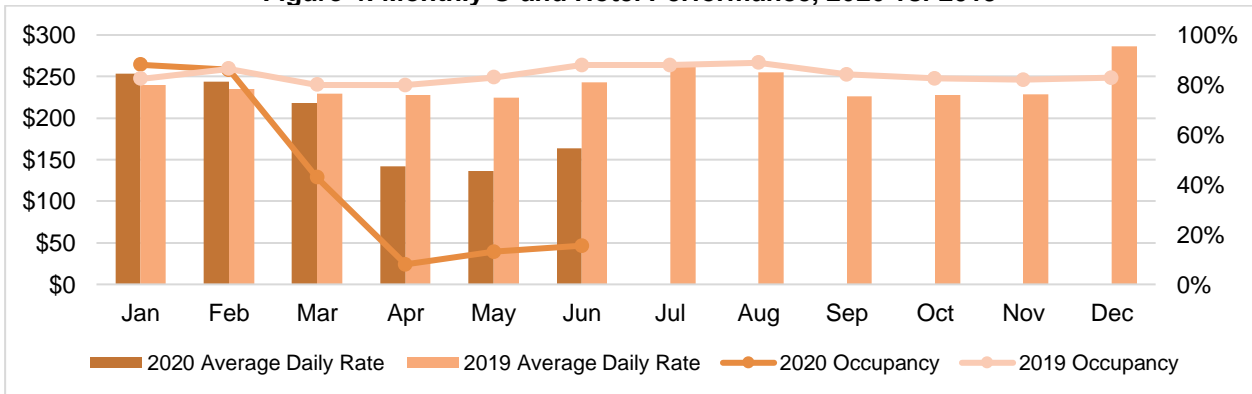
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Figure 3: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



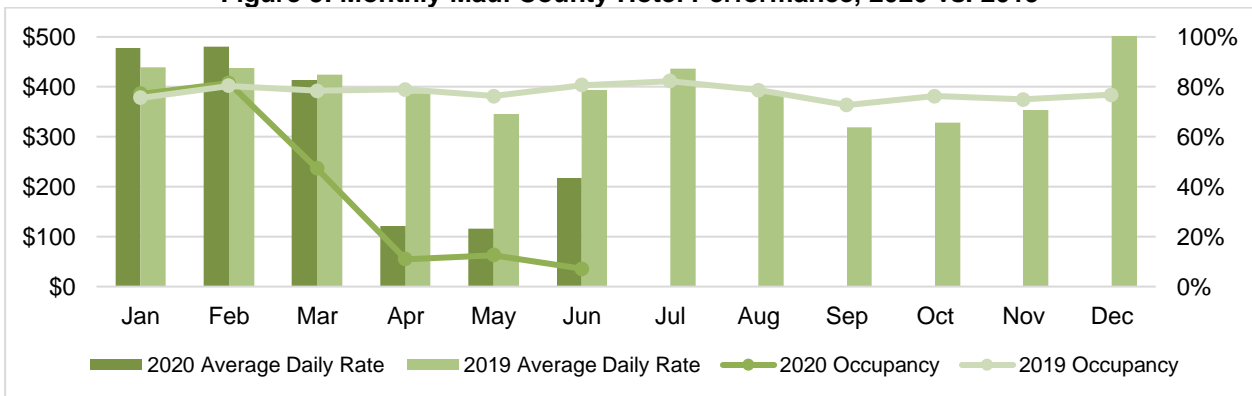
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Figure 4: Monthly O'ahu Hotel Performance, 2020 vs. 2019



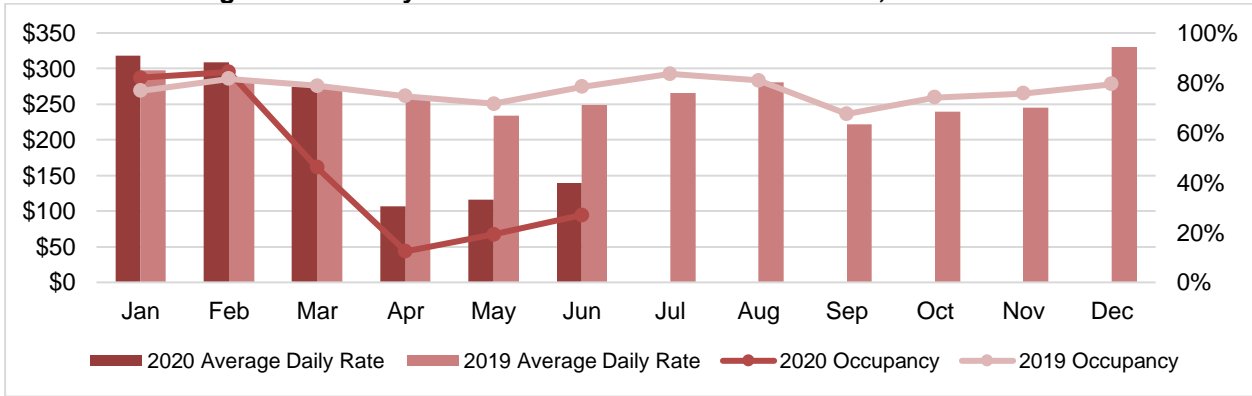
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Figure 5: Monthly Maui County Hotel Performance, 2020 vs. 2019



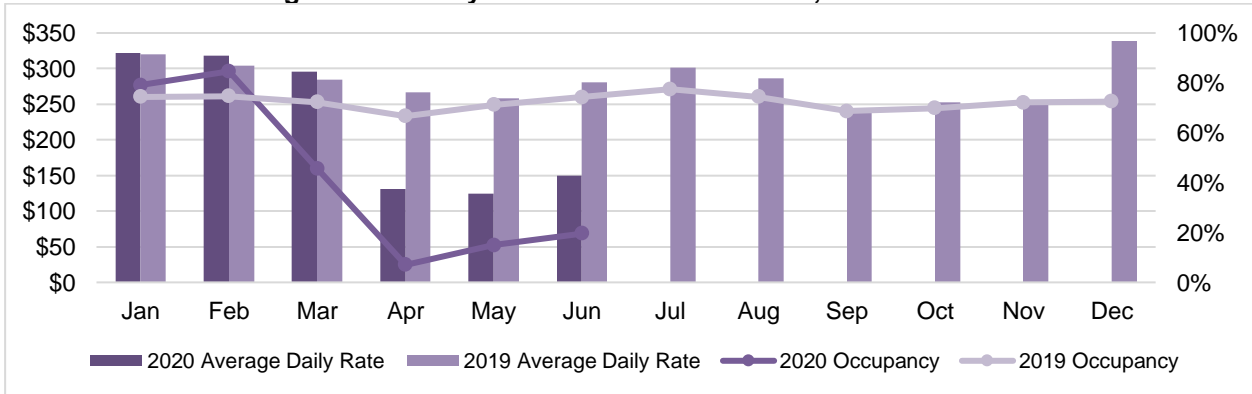
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Figure 6: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



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Figure 7: Monthly Kaua'i Hotel Performance, 2020 vs. 2019



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Figure 8: Hawai'i Hotel Performance Year-to-Date June 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	49.7%	80.5%	-30.8%	\$290.80	\$279.99	3.9%	\$144.49	\$225.27	-35.9%
Luxury Class	51.6%	76.3%	-24.7%	\$614.89	\$562.14	9.4%	\$317.23	\$428.71	-26.0%
Upper Upscale Class	53.4%	82.2%	-28.8%	\$292.10	\$277.99	5.1%	\$156.05	\$228.63	-31.7%
Upscale Class	42.7%	77.8%	-35.1%	\$224.36	\$210.14	6.8%	\$95.78	\$163.51	-41.4%
Upper Midscale Class	49.2%	83.5%	-34.3%	\$170.76	\$161.33	5.8%	\$83.98	\$134.74	-37.7%
Midscale & Economy Class	53.4%	82.4%	-29.0%	\$175.46	\$175.43	0.0%	\$93.71	\$144.53	-35.2%
O'ahu	50.3%	83.3%	-32.9%	\$234.99	\$233.18	0.8%	\$118.27	\$194.19	-39.1%
Waikiki	49.3%	83.5%	-34.3%	\$232.98	\$228.28	2.1%	\$114.77	\$190.68	-39.8%
Other O'ahu	56.2%	81.8%	-25.6%	\$244.70	\$263.44	-7.1%	\$137.57	\$215.42	-36.1%
O'ahu Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
O'ahu Upper Upscale	52.4%	84.8%	-32.4%	\$259.30	\$257.23	0.8%	\$135.90	\$218.03	-37.7%
O'ahu Upscale	47.7%	83.6%	-35.9%	\$199.06	\$191.67	3.9%	\$94.90	\$160.28	-40.8%
O'ahu Upper Midscale	48.7%	83.9%	-35.1%	\$162.32	\$154.43	5.1%	\$79.13	\$129.55	-38.9%
O'ahu Midscale & Economy	63.8%	87.1%	-23.4%	\$133.13	\$130.47	2.0%	\$84.89	\$113.67	-25.3%
Maui County	49.2%	78.5%	-29.3%	\$443.63	\$403.40	10.0%	\$218.06	\$316.65	-31.1%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	46.4%	77.8%	-31.4%	\$380.87	\$338.38	12.6%	\$176.70	\$263.32	-32.9%
Other Maui County	52.7%	79.4%	-26.7%	\$514.35	\$484.75	6.1%	\$270.98	\$384.71	-29.6%
Maui County Luxury	NA	NA	NA	NA	NA	NA	NA	NA	NA
Maui County Upper Upscale & Upscale	46.0%	78.4%	-32.4%	\$367.46	\$320.82	14.5%	\$169.05	\$251.42	-32.8%
Island of Hawai'i	50.2%	76.9%	-26.7%	\$277.46	\$266.34	4.2%	\$139.28	\$204.89	-32.0%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	46.1%	72.1%	-26.0%	\$293.85	\$285.94	2.8%	\$135.34	\$206.16	-34.4%

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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 9: Hawai'i Hotel Performance by Measure Year-to-Date June 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	7,548.7	9,795.0	-22.9%	3,750.8	7,880.9	-52.4%	1,090.7	2,206.5	-50.6%
O'ahu	4,278.8	5,499.4	-22.2%	2,153.5	4,579.8	-53.0%	506.1	1,067.9	-52.6%
Waikiki	3,620.7	4,718.7	-23.3%	1,783.6	3,941.5	-54.7%	415.5	899.8	-53.8%
Maui County	1,672.7	2,303.4	-27.4%	822.2	1,808.1	-54.5%	364.8	729.4	-50.0%
Wailea	NA	NA	NA	NA	NA	NA	NA	NA	NA
Lahaina/Kā'anapali/Kapalua	938.9	1,291.4	-27.3%	435.6	1,005.0	-56.7%	165.9	340.1	-51.2%
Island of Hawai'i	952.5	1,171.6	-18.7%	478.2	901.3	-46.9%	132.7	240.0	-44.7%
Kohala Coast	NA	NA	NA	NA	NA	NA	NA	NA	NA
Kaua'i	644.7	820.6	-21.4%	296.9	591.7	-49.8%	87.3	169.2	-48.4%

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Figure 10: Top 5 U.S. Markets – Revenue Per Available Room – YTD June 2020

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$144.49	-35.9%
2	Miami/Hialeah, FL	\$126.19	-27.1%
3	San Francisco/San Mateo, CA	\$97.84	-52.7%
4	New York, NY	\$86.56	-55.7%
5	Los Angeles/Long Beach, CA	\$76.61	-46.2%

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Figure 11: Top 5 U.S. Markets – Average Daily Rate – YTD June 2020

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$290.80	3.9%
2	Miami/Hialeah, FL	\$231.44	6.4%
3	San Francisco/San Mateo, CA	\$217.12	-14.9%
4	New York, NY	\$161.31	-31.2%
5	Los Angeles/Long Beach, CA	\$151.28	-15.5%

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Figure 12: Top 5 U.S. Markets – Occupancy – YTD June 2020

Rank	Destination	Occupancy	Percentage Pt. Change
1	Miami/Hialeah, FL	54.5%	-25.1%
2	New York, NY	53.7%	-29.7%
3	Tampa/St Petersburg, FL	53.1%	-24.5%
4	Phoenix, AZ	52.9%	-22.7%
5	Los Angeles/Long Beach, CA	50.6%	-28.8%
8	Hawaiian Islands	49.7%	-30.8%

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Figure 13: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD June 2020

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$291.93	-29.8%
2	Maui	\$218.06	-31.1%
3	Hawai'i Island	\$139.28	-32.0%
4	Kaua'i	\$135.34	-34.4%
5	O'ahu	\$118.27	-39.1%
6	Cabo San Lucas+	\$100.08	-45.4%
7	Puerto Rico	\$80.07	-48.7%
8	Costa Rica	\$78.73	-41.1%
9	Cancun+	\$60.38	-57.9%
10	Phuket	\$59.06	-39.6%
11	Fiji	\$40.97	-58.8%
12	Puerto Vallarta+	\$37.11	-45.1%
13	Bali	\$28.47	-57.1%

Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

Note: Data were not available for Aruba and French Polynesia

Figure 14: Competitive Sun and Sea Destinations – Average Daily Rate – YTD June 2020

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$744.32	25.3%
2	Maui	\$443.63	10.0%
3	Cabo San Lucas+	\$334.07	-3.7%
4	Kaua'i	\$293.85	2.8%
5	Hawai'i Island	\$277.46	4.2%
6	O'ahu	\$234.99	0.8%
7	Puerto Rico	\$220.24	-4.6%
8	Costa Rica	\$199.37	5.5%
9	Phuket	\$155.16	16.1%
10	Cancun+	\$152.84	-25.9%
11	Fiji	\$121.44	-18.6%
12	Bali	\$100.95	-2.3%
13	Puerto Vallarta+	\$92.18	-1.7%

Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

Note: Data were not available for Aruba and French Polynesia

Figure 15: Competitive Sun and Sea Destinations – Occupancy – YTD June 2020

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	50.3%	-32.9%
2	Hawai'i Island	50.2%	-26.7%
3	Maui	49.2%	-29.3%
4	Kaua'i	46.1%	-26.0%
5	Puerto Vallarta+	40.3%	-31.9%
6	Cancun+	39.5%	-30.0%
7	Costa Rica	39.5%	-31.2%
8	Maldives	39.2%	-30.7%
9	Phuket	38.1%	-35.1%
10	Puerto Rico	36.4%	-31.3%
11	Fiji	33.7%	-32.9%
12	Cabo San Lucas+	30.0%	-22.9%
13	Bali	28.2%	-36.0%

Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority

Note: Data were not available for Aruba and French Polynesia