



July 2020 Hawaii Hotel Performance Report

In July 2020, Hawaii hotels statewide continued to report substantially lower revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to July 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 declined to \$36 (-86.0%), ADR decreased to \$174 (-42.7%), and occupancy fell to 20.9 percent (-64.4 percentage points) (Figure 1) in July.

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 July, Hawaii hotel room revenues statewide fell by 92.3 percent to \$33.3 million from \$434.1 million a year ago. Room supply declined to 914,900 room nights (-45.4%) and room demand dropped to 191,300 room nights (-86.6%) (Figure 2). Many properties closed or reduced operations starting in April 2020. During July, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine, but interisland travelers did not have to quarantine.

All classes of Hawaii hotel properties statewide reported lower RevPAR, ADR and occupancy in July compared to a year ago. Luxury Class properties earned RevPAR of \$40 (-91.9%), with ADR at \$396 (-34.6%) and occupancy of 10.2 percent (-72.8 percentage points). Midscale & Economy Class properties reported nearly identical RevPAR (\$40, -73.1%), with ADR at \$139 (-21.9%) and occupancy of 29.1 percent (-55.4 percentage points).

Maui County hotels reported RevPAR of \$25 (-93.0%), with declines in both ADR to \$206 (-52.4%) and occupancy of 12.1 percent (-70.7 percentage points) in July. Data for the month of July was not available for Maui's luxury resort region of Wailea. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$6 (-98.0%), ADR at \$139 (-61.9%) and occupancy of 4.3 percent (-78.0 percentage points).

O'ahu hotels reported RevPAR of \$40 (-82.8%) in July, with ADR at \$170 (-35.0%) and occupancy of 23.3 percent (-64.6 percentage points). Waikīkī hotels earned \$34 (-84.8%) in RevPAR with ADR at \$170 (-33.3%) and occupancy of 20.0 percent (-67.8 percentage points).

Hotels on the island of Hawaii earned RevPAR of \$40 (-81.7%) in July, with ADR at \$164 (-38.2%) and occupancy of 24.7 percent (-58.7 percentage points). Data for the month of July was not available for the Kohala Coast.

Kaua'i hotels reported RevPAR of \$38 (-83.6%) in July, with ADR at \$175 (-41.7%) and occupancy of 21.6 percent (-55.1 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 July, the survey included 88 properties representing 20,241 rooms, or 37.7 percent of all lodging properties and 68.6 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 July 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	20.9%	85.3%	-64.4%	\$174.03	\$303.93	-42.7%	\$36.39	\$259.16	-86.0%
Luxury Class	10.2%	83.0%	-72.8%	\$395.82	\$605.23	-34.6%	\$40.46	\$502.22	-91.9%
Upper Upscale Class	20.6%	87.7%	-67.1%	\$185.89	\$305.15	-39.1%	\$38.34	\$267.66	-85.7%
Upscale Class	18.2%	82.2%	-64.1%	\$166.08	\$219.22	-24.2%	\$30.15	\$180.22	-83.3%
Upper Midscale Class	26.8%	86.3%	-59.5%	\$154.84	\$178.40	-13.2%	\$41.45	\$153.98	-73.1%
Midscale & Economy Class	29.1%	84.5%	-55.4%	\$138.87	\$177.81	-21.9%	\$40.45	\$150.33	-73.1%
O'ahu	23.3%	88.0%	-64.6%	\$170.01	\$261.62	-35.0%	\$39.69	\$230.20	-82.8%
Waikiki	20.0%	87.8%	-67.8%	\$169.63	\$254.40	-33.3%	\$33.95	\$223.42	-84.8%
Other O'ahu	39.5%	89.0%	-49.6%	\$170.94	\$304.63	-43.9%	\$67.44	\$271.13	-75.1%
O'ahu Luxury	NA	82.4%	NA	NA	\$529.61	NA	NA	\$436.21	NA
O'ahu Upper Upscale	19.9%	89.1%	-69.2%	\$196.17	\$286.80	-31.6%	\$39.11	\$255.51	-84.7%
O'ahu Upscale	26.0%	89.2%	-63.2%	\$176.37	\$210.78	-16.3%	\$45.78	\$188.03	-75.7%
O'ahu Upper Midscale	25.2%	86.4%	-61.2%	\$156.10	\$174.37	-10.5%	\$39.38	\$150.69	-73.9%
O'ahu Midscale & Economy	NA	89.2%	NA	NA	\$145.02	NA	NA	\$129.34	NA
Maui County	12.1%	82.8%	-70.7%	\$205.74	\$432.51	-52.4%	\$24.91	\$357.93	-93.0%
Wailea	NA	91.7%	NA	NA	\$697.21	NA	NA	\$639.54	NA
Lahaina/Kā'anapali/Kapalua	4.3%	82.3%	-78.0%	\$139.19	\$365.48	-61.9%	\$6.02	\$300.76	-98.0%
Other Maui County	21.8%	83.4%	-61.6%	\$222.18	\$517.92	-57.1%	\$48.38	\$431.72	-88.8%
Maui County Luxury	NA	85.7%	NA	NA	\$719.14	NA	NA	\$616.15	NA
Maui County Upper Upscale & Upscale	8.7%	82.9%	-74.2%	\$180.20	\$341.98	-47.3%	\$15.68	\$283.52	-94.5%
Island of Hawai'i	24.7%	83.4%	-58.7%	\$163.87	\$265.38	-38.2%	\$40.49	\$221.42	-81.7%
Kohala Coast	NA	85.9%	NA	NA	\$376.33	NA	NA	\$323.39	NA
Kaua'i	21.6%	76.7%	-55.1%	\$175.49	\$301.26	-41.7%	\$37.87	\$231.07	-83.6%

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

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 July 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	914.9	1,675.0	-45.4%	191.3	1,428.2	-86.6%	33.3	434.1	-92.3%
O'ahu	488.4	940.8	-48.1%	114.0	827.8	-86.2%	19.4	216.6	-91.1%
Waikiki	404.7	807.1	-49.9%	81.0	708.8	-88.6%	13.7	180.3	-92.4%
Maui County	200.5	392.6	-48.9%	24.3	324.9	-92.5%	5.0	140.5	-96.4%
Wailea	NA	68.0	NA	NA	62.4	NA	NA	43.5	NA
Lahaina/Kā'anapali/Kapalua	111.1	221.2	-49.8%	4.8	182.0	-97.4%	0.7	66.5	-99.0%
Island of Hawai'i	135.4	200.7	-32.5%	33.4	167.4	-80.0%	5.5	44.4	-87.7%
Kohala Coast	NA	93.0	NA	NA	79.9	NA	NA	30.1	NA
Kaua'i	90.6	141.0	-35.7%	19.6	108.1	-81.9%	3.4	32.6	-89.5%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	47.0%	81.2%	-34.2%	\$284.56	\$283.66	0.3%	\$133.64	\$230.22	-42.0%
Luxury Class	48.4%	77.2%	-28.9%	\$611.21	\$568.91	7.4%	\$295.75	\$439.46	-32.7%
Upper Upscale Class	51.1%	83.0%	-32.0%	\$287.57	\$282.18	1.9%	\$146.81	\$234.33	-37.3%
Upscale Class	39.8%	78.4%	-38.6%	\$220.92	\$211.53	4.4%	\$87.98	\$165.94	-47.0%
Upper Midscale Class	46.3%	83.9%	-37.6%	\$168.90	\$163.90	3.0%	\$78.19	\$137.55	-43.2%
Midscale & Economy Class	51.4%	82.7%	-31.3%	\$172.00	\$175.79	-2.2%	\$88.48	\$145.38	-39.1%
O'ahu	48.1%	84.0%	-35.9%	\$231.48	\$237.53	-2.5%	\$111.32	\$199.45	-44.2%
Waikiki	46.9%	84.2%	-37.3%	\$230.12	\$232.26	-0.9%	\$107.83	\$195.46	-44.8%
Other O'ahu	54.7%	82.8%	-28.1%	\$237.76	\$269.91	-11.9%	\$130.03	\$223.57	-41.8%
O'ahu Luxury	NA	72.8%	NA	NA	\$490.98	NA	NA	\$357.29	NA
O'ahu Upper Upscale	50.1%	85.4%	-35.3%	\$257.42	\$261.73	-1.6%	\$128.90	\$223.50	-42.3%
O'ahu Upscale	46.2%	84.4%	-38.2%	\$197.63	\$194.63	1.5%	\$91.33	\$164.34	-44.4%
O'ahu Upper Midscale	45.7%	84.3%	-38.6%	\$161.39	\$157.42	2.5%	\$73.68	\$132.64	-44.5%
O'ahu Midscale & Economy	59.0%	87.4%	-28.4%	\$132.82	\$132.64	0.1%	\$78.34	\$115.96	-32.4%
Maui County	45.6%	79.1%	-33.5%	\$433.26	\$407.83	6.2%	\$197.69	\$322.66	-38.7%
Wailea	NA	90.0%	NA	NA	\$625.77	NA	NA	\$562.96	NA
Lahaina/Kā'anapali/Kapalua	41.9%	78.5%	-36.5%	\$378.38	\$342.54	10.5%	\$158.64	\$268.80	-41.0%
Other Maui County	50.3%	79.9%	-29.6%	\$491.45	\$489.76	0.3%	\$247.40	\$391.52	-36.8%
Maui County Luxury	NA	81.9%	NA	NA	\$665.39	NA	NA	\$544.87	NA
Maui County Upper Upscale & Upscale	42.4%	79.0%	-36.6%	\$359.07	\$324.05	10.8%	\$152.23	\$256.09	-40.6%
Island of Hawai'i	47.0%	77.9%	-30.9%	\$270.03	\$266.19	1.4%	\$126.99	\$207.30	-38.7%
Kohala Coast	NA	78.7%	NA	NA	\$376.82	NA	NA	\$296.57	NA
Kaua'i	43.0%	72.8%	-29.7%	\$286.53	\$288.31	-0.6%	\$123.33	\$209.81	-41.2%

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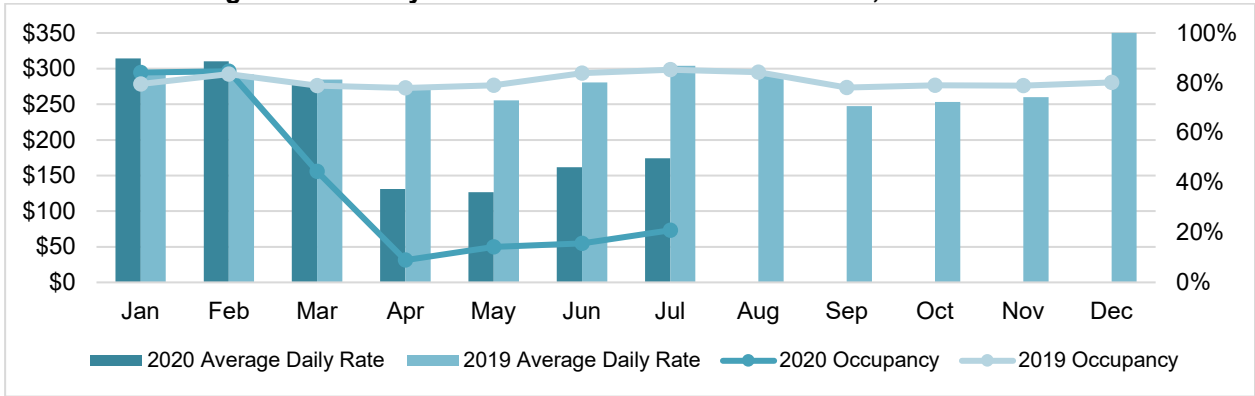
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	8,413.3	11,470.0	-26.6%	3,951.2	9,309.1	-57.6%	1,124.4	2,640.6	-57.4%
O'ahu	4,715.6	6,440.1	-26.8%	2,267.8	5,407.6	-58.1%	525.0	1,284.5	-59.1%
Waikiki	3,973.8	5,525.8	-28.1%	1,862.1	4,650.2	-60.0%	428.5	1,080.1	-60.3%
Maui County	1,874.5	2,696.0	-30.5%	855.3	2,133.0	-59.9%	370.6	869.9	-57.4%
Wailea	NA	465.1	NA	NA	418.4	NA	NA	261.8	NA
Lahaina/Kā'anapali/Kapalua	1,050.0	1,512.6	-30.6%	440.2	1,187.0	-62.9%	166.6	406.6	-59.0%
Island of Hawai'i	1,087.9	1,372.3	-20.7%	511.6	1,068.7	-52.1%	138.2	284.5	-51.4%
Kohala Coast	NA	636.0	NA	NA	500.6	NA	NA	188.6	NA
Kaua'i	735.3	961.6	-23.5%	316.5	699.8	-54.8%	90.7	201.8	-55.1%

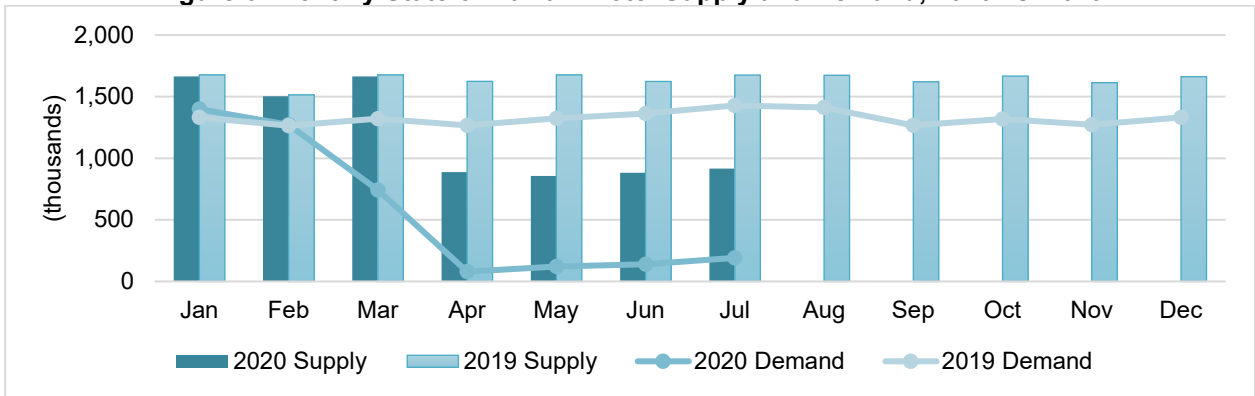
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



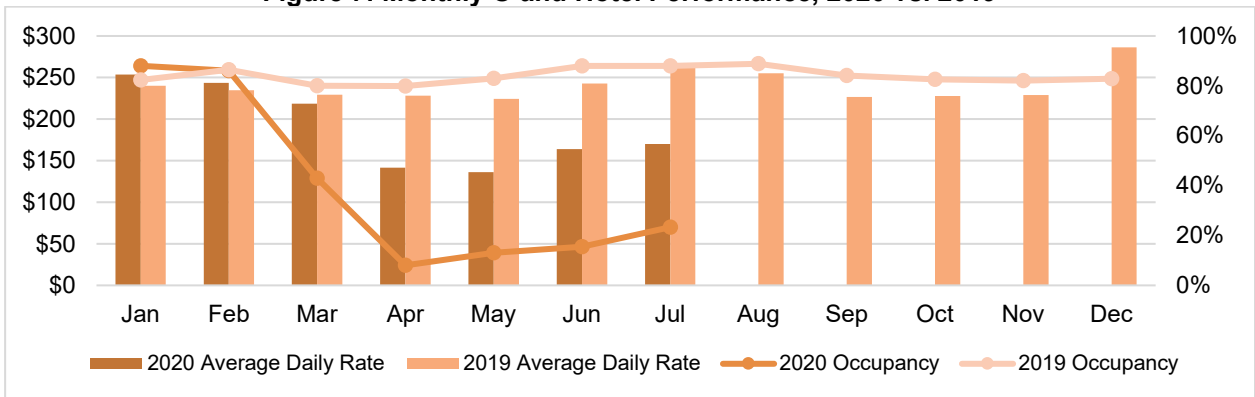
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019



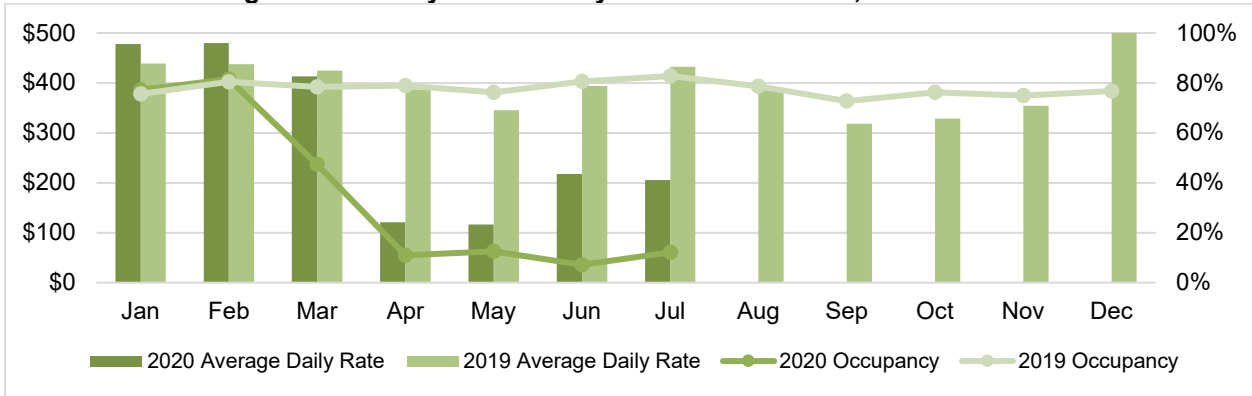
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Figure 7: Monthly O'ahu Hotel Performance, 2020 vs. 2019



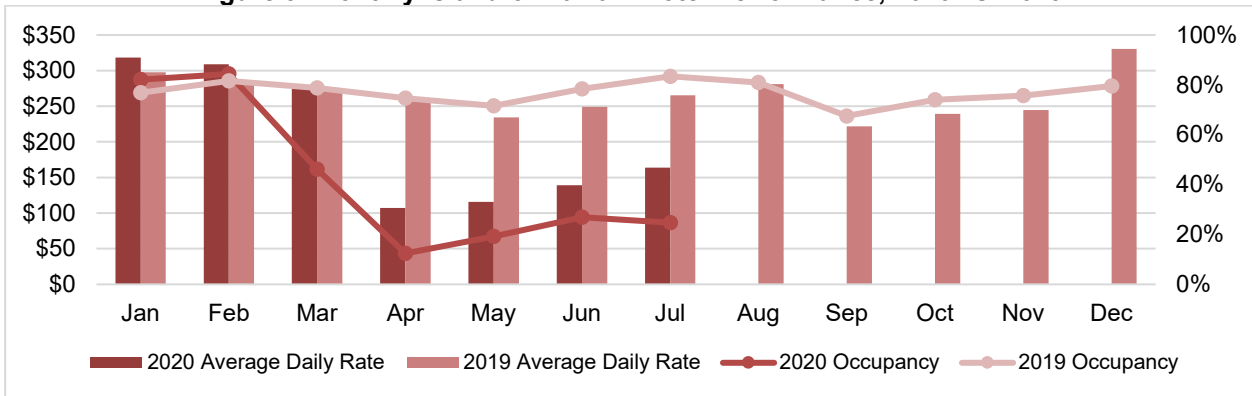
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Figure 8: Monthly Maui County Hotel Performance, 2020 vs. 2019



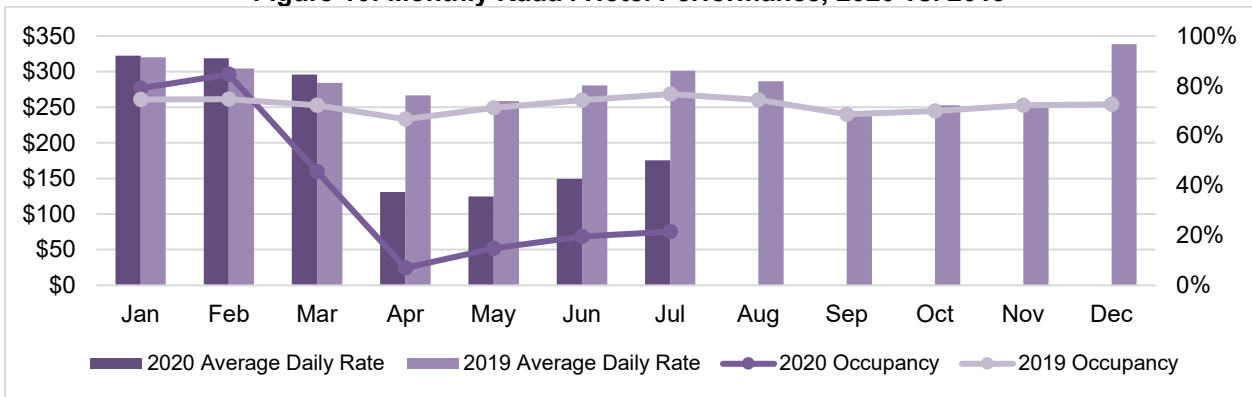
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Figure 9: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



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Figure 10: Monthly Kauai Hotel Performance, 2020 vs. 2019



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