



## August 2020 Hawaii Hotel Performance Report

In August 2020, Hawaii hotels statewide continued to report substantially lower revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to the previous August 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 \$34 (-85.9%), ADR decreased to \$158 (-45.5%), and occupancy fell to 21.7 percent (-62.4 percentage points) (Figure 1).

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 August, Hawaii hotel room revenues statewide fell by 92.1 percent to \$32.3 million from \$408.4 million a year ago. Room supply declined to 941,200 room nights (-43.8%) and room demand dropped to 204,400 room nights (-85.5%) (Figure 2). Many properties closed or reduced operations starting in April 2020. During August, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine. On August 11, a partial interisland quarantine was reinstated for anyone traveling to the counties of Kauai, Hawaii, Maui, and Kalawao (Molokai).

All classes of Hawaii hotel properties statewide reported lower RevPAR, ADR and occupancy in August compared to a year ago. Luxury Class properties earned RevPAR of \$10 (-97.8%), with ADR at \$442 (-23.5%) and occupancy of 2.3 percent (-79.1 percentage points). Midscale & Economy Class properties reported the highest August RevPAR (\$42, -70.2%) among the price classes, with ADR at \$130 (-24.3%) and occupancy of 32.7 percent (-50.3 percentage points).

Maui County hotels reported RevPAR of \$18 (-94.2%), with declines in both ADR to \$207 (-47.2%) and occupancy of 8.6 percent (-69.4 percentage points). Data for the month of August was not available for Maui's luxury resort region of Wailea. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$4 (-98.3%), ADR at \$125 (-61.8%) and occupancy of 3.5 percent (-72.8 percentage points).

O'ahu hotels reported RevPAR of \$42 (-81.4%) in August, with ADR at \$157 (-38.4%) and occupancy of 26.8 percent (-62.2 percentage points). Waikiki hotels earned \$36 (-84.0%) in RevPAR with ADR at \$152 (-38.9%) and occupancy of 23.4 percent (-65.8 percentage points).

Hotels on the island of Hawaii earned RevPAR of \$34 (-85.1%) in August, with ADR at \$130 (-53.7%) and occupancy of 26.1 percent (-54.9 percentage points). Data for the month of August was not available for the Kohala Coast.

Kauai hotels reported RevPAR of \$28 (-86.7%) in August, with ADR at \$165 (-41.8%) and occupancy of 16.8 percent (-56.9 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 August, the survey included 89 properties representing 21,887 rooms, or 40.8 percent of all lodging properties and 72.1 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 August 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	21.7%	84.1%	-62.4%	\$157.94	\$289.94	-45.5%	\$34.30	\$243.93	-85.9%
Luxury Class	2.3%	81.5%	-79.1%	\$441.53	\$577.45	-23.5%	\$10.33	\$470.51	-97.8%
Upper Upscale Class	20.0%	87.0%	-67.0%	\$175.13	\$291.99	-40.0%	\$34.99	\$253.94	-86.2%
Upscale Class	19.9%	79.5%	-59.5%	\$162.69	\$208.45	-22.0%	\$32.40	\$165.62	-80.4%
Upper Midscale Class	28.4%	87.8%	-59.5%	\$145.85	\$168.59	-13.5%	\$41.38	\$148.06	-72.1%
Midscale & Economy Class	32.7%	83.0%	-50.3%	\$129.57	\$171.09	-24.3%	\$42.33	\$141.94	-70.2%
<b>O'ahu</b>	26.8%	89.0%	-62.2%	\$157.24	\$255.26	-38.4%	\$42.13	\$227.10	-81.4%
Waikiki	23.4%	89.2%	-65.8%	\$152.21	\$249.20	-38.9%	\$35.58	\$222.28	-84.0%
Other O'ahu	44.9%	87.6%	-42.7%	\$171.15	\$292.69	-41.5%	\$76.81	\$256.30	-70.0%
O'ahu Luxury	NA	83.6%	NA	NA	\$530.79	NA	NA	\$443.70	NA
O'ahu Upper Upscale	23.6%	90.4%	-66.7%	\$169.19	\$278.87	-39.3%	\$39.98	\$251.98	-84.1%
O'ahu Upscale	29.8%	88.0%	-58.2%	\$173.70	\$205.86	-15.6%	\$51.81	\$181.18	-71.4%
O'ahu Upper Midscale	28.5%	88.7%	-60.2%	\$144.42	\$164.82	-12.4%	\$41.15	\$146.23	-71.9%
O'ahu Midscale & Economy	45.8%	90.4%	-44.6%	\$123.72	\$141.10	-12.3%	\$56.71	\$127.61	-55.6%
<b>Maui County</b>	8.6%	77.9%	-69.4%	\$206.91	\$392.12	-47.2%	\$17.72	\$305.55	-94.2%
Wailea	NA	90.9%	NA	NA	\$625.88	NA	NA	\$568.98	NA
Lahaina/Kā'anapali/Kapalua	3.5%	76.3%	-72.8%	\$124.56	\$325.91	-61.8%	\$4.31	\$248.52	-98.3%
Other Maui County	14.7%	80.1%	-65.4%	\$230.27	\$473.51	-51.4%	\$33.88	\$379.17	-91.1%
Maui County Luxury	3.8%	83.1%	-79.4%	\$572.24	\$649.79	-11.9%	\$21.46	\$540.13	-96.0%
Maui County Upper Upscale & Upscale	7.0%	77.2%	-70.1%	\$203.35	\$303.70	-33.0%	\$14.26	\$234.32	-93.9%
<b>Island of Hawai'i</b>	26.1%	80.9%	-54.9%	\$129.53	\$280.00	-53.7%	\$33.76	\$226.58	-85.1%
Kohala Coast	NA	84.3%	NA	NA	\$405.96	NA	NA	\$342.35	NA
<b>Kaua'i</b>	16.8%	73.7%	-56.9%	\$165.13	\$283.83	-41.8%	\$27.78	\$209.23	-86.7%

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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 August 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	941.2	1,674.3	-43.8%	204.4	1,408.6	-85.5%	32.3	408.4	-92.1%
<b>O'ahu</b>	522.4	940.1	-44.4%	140.0	836.4	-83.3%	22.0	213.5	-89.7%
Waikiki	439.5	807.1	-45.5%	102.7	719.9	-85.7%	15.6	179.4	-91.3%
<b>Maui County</b>	205.8	392.6	-47.6%	17.6	305.9	-94.2%	3.6	119.9	-97.0%
Wailea	NA	68.0	NA	NA	61.8	NA	NA	38.7	NA
Lahaina/Kā'anapali/Kapalua	112.5	221.2	-49.1%	3.9	168.7	-97.7%	0.5	55.0	-99.1%
<b>Island of Hawai'i</b>	118.6	200.7	-40.9%	30.9	162.4	-81.0%	4.0	45.5	-91.2%
Kohala Coast	NA	93.0	NA	NA	78.4	NA	NA	31.8	NA
<b>Kaua'i</b>	94.4	141.0	-33.1%	15.9	103.9	-84.7%	2.6	29.5	-91.1%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	44.7%	81.5%	-36.8%	\$277.91	\$284.56	-2.3%	\$124.33	\$232.01	-46.4%
Luxury Class	47.2%	77.8%	-30.6%	\$617.44	\$570.05	8.3%	\$291.22	\$443.42	-34.3%
Upper Upscale Class	48.8%	83.5%	-34.8%	\$284.12	\$283.54	0.2%	\$138.58	\$236.84	-41.5%
Upscale Class	37.5%	78.6%	-41.1%	\$216.78	\$211.13	2.7%	\$81.30	\$165.90	-51.0%
Upper Midscale Class	44.1%	84.4%	-40.3%	\$166.37	\$164.52	1.1%	\$73.43	\$138.89	-47.1%
Midscale & Economy Class	49.5%	82.7%	-33.2%	\$168.21	\$175.29	-4.0%	\$83.23	\$145.01	-42.6%
<b>O'ahu</b>	46.1%	84.6%	-38.5%	\$226.89	\$239.97	-5.4%	\$104.69	\$203.02	-48.4%
Waikiki	44.7%	84.8%	-40.1%	\$225.64	\$234.53	-3.8%	\$100.91	\$198.88	-49.3%
Other O'ahu	53.8%	83.4%	-29.7%	\$232.51	\$273.51	-15.0%	\$124.99	\$228.17	-45.2%
O'ahu Luxury	NA	74.2%	NA	NA	\$496.70	NA	NA	\$368.32	NA
O'ahu Upper Upscale	48.4%	86.0%	-37.7%	\$254.46	\$264.02	-3.6%	\$123.09	\$227.12	-45.8%
O'ahu Upscale	44.3%	84.9%	-40.6%	\$195.76	\$196.11	-0.2%	\$86.73	\$166.49	-47.9%
O'ahu Upper Midscale	43.6%	84.8%	-41.2%	\$159.32	\$158.41	0.6%	\$69.50	\$134.38	-48.3%
O'ahu Midscale & Economy	58.2%	87.8%	-29.6%	\$130.85	\$133.60	-2.1%	\$76.17	\$117.34	-35.1%
<b>Maui County</b>	42.0%	79.0%	-37.0%	\$428.69	\$405.86	5.6%	\$179.88	\$320.49	-43.9%
Wailea	NA	90.1%	NA	NA	\$625.79	NA	NA	\$563.73	NA
Lahaina/Kā'anapali/Kapalua	38.2%	78.2%	-40.0%	\$376.16	\$340.47	10.5%	\$143.71	\$266.21	-46.0%
Other Maui County	46.7%	80.0%	-33.2%	\$483.09	\$487.70	-0.9%	\$225.70	\$389.96	-42.1%
Maui County Luxury	NA	82.0%	NA	NA	\$663.37	NA	NA	\$544.26	NA
Maui County Upper Upscale & Upscale	38.8%	78.8%	-40.0%	\$356.18	\$321.52	10.8%	\$138.08	\$253.33	-45.5%
<b>Island of Hawai'i</b>	46.6%	78.3%	-31.6%	\$260.56	\$268.01	-2.8%	\$121.53	\$209.76	-42.1%
Kohala Coast	NA	79.4%	NA	NA	\$380.77	NA	NA	\$302.41	NA
<b>Kaua'i</b>	40.2%	72.8%	-32.6%	\$279.27	\$288.03	-3.0%	\$112.40	\$209.78	-46.4%

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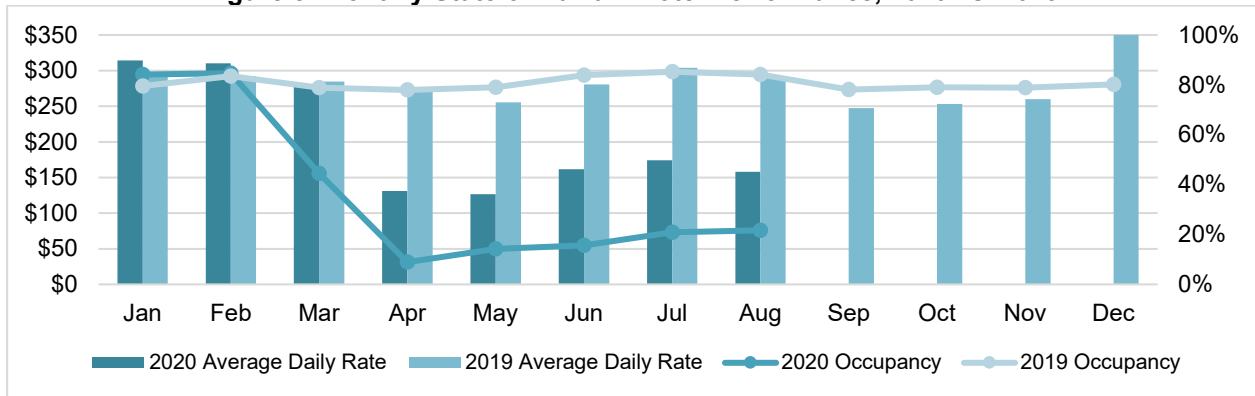
Note: Samples for Maui Upper Midscale, Midscale and Economy Classes were insufficient for reporting purposes, but these data are included in Maui and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	9,268.6	13,139.6	-29.5%	4,146.5	10,713.0	-61.3%	1,152.4	3,048.5	-62.2%
<b>O'ahu</b>	5,217.9	7,375.5	-29.3%	2,407.6	6,240.0	-61.4%	546.3	1,497.4	-63.5%
Waikiki	4,397.9	6,332.8	-30.6%	1,966.9	5,370.1	-63.4%	443.8	1,259.5	-64.8%
<b>Maui County</b>	2,080.3	3,088.5	-32.6%	872.9	2,438.9	-64.2%	374.2	989.8	-62.2%
Wailea	NA	533.1	NA	NA	480.3	NA	NA	300.5	NA
Lahaina/Kā'anapali/Kapalua	1,162.5	1,733.8	-33.0%	444.1	1,355.7	-67.2%	167.1	461.6	-63.8%
<b>Island of Hawai'i</b>	1,140.7	1,572.9	-27.5%	532.0	1,231.1	-56.8%	138.6	329.9	-58.0%
Kohala Coast	NA	729.0	NA	NA	579.0	NA	NA	220.5	NA
<b>Kaua'i</b>	829.7	1,102.6	-24.8%	333.9	803.1	-58.4%	93.3	231.3	-59.7%

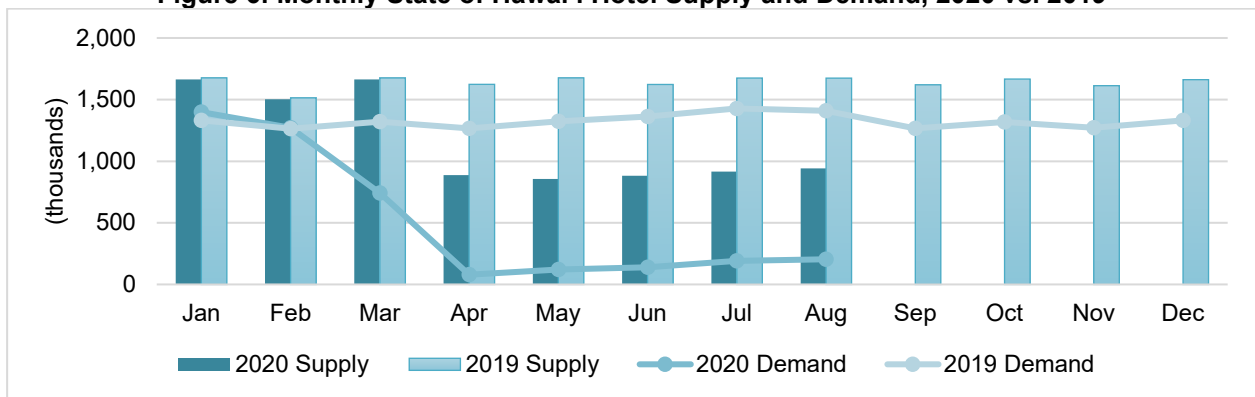
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**Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019**



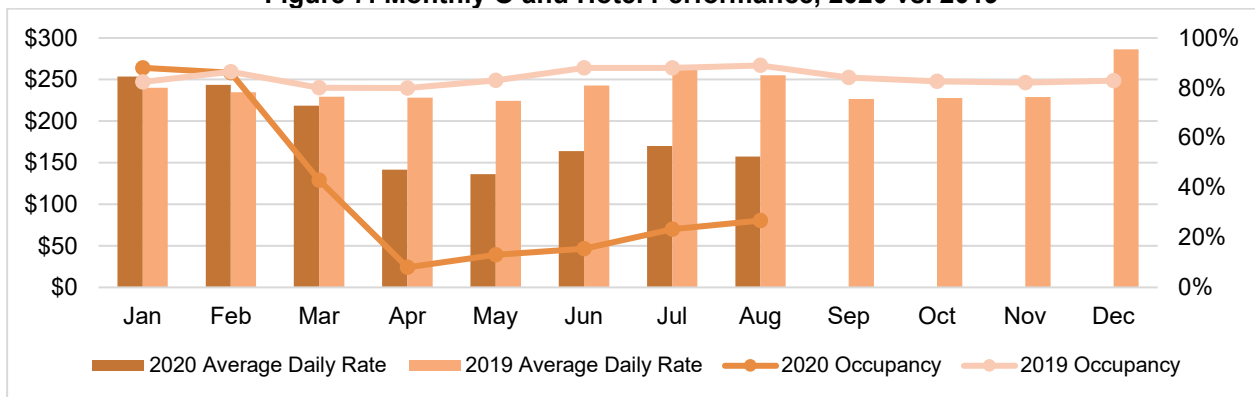
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**Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



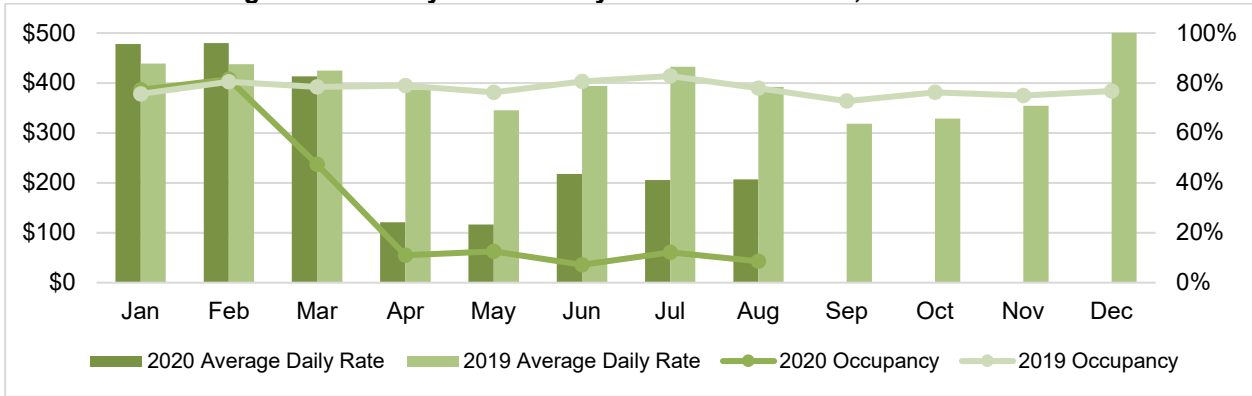
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**Figure 7: Monthly O'ahu Hotel Performance, 2020 vs. 2019**



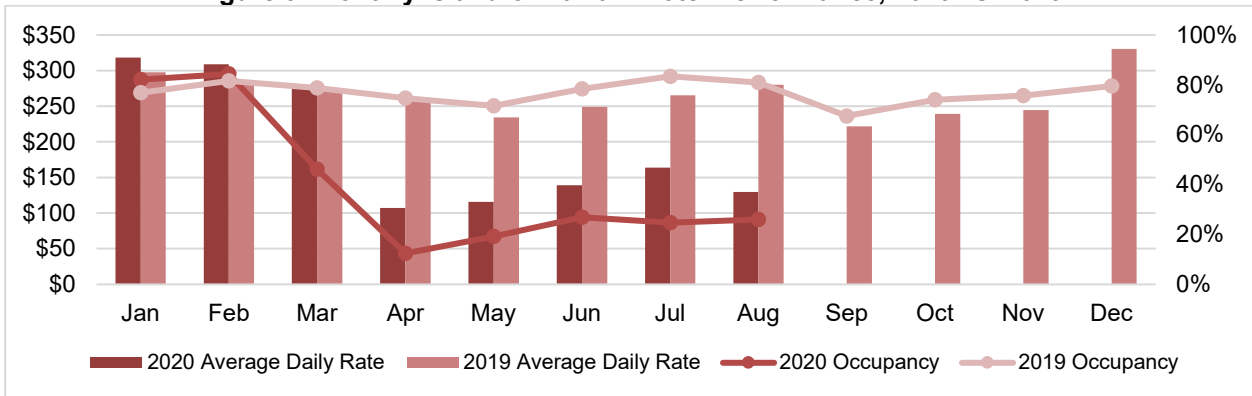
Source: STR, Inc. © Copyright 2020 Hawai'i Tourism Authority.

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



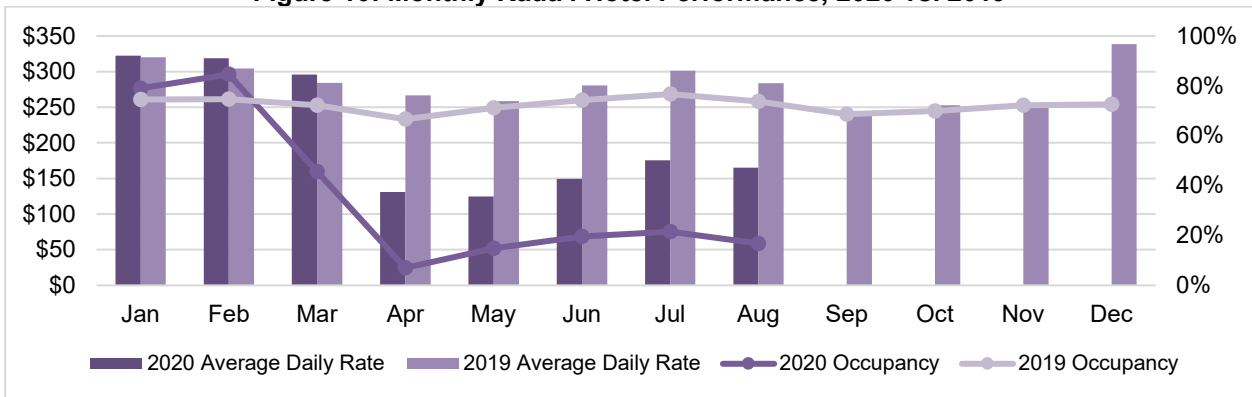
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**Figure 9: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019**



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**Figure 10: Monthly Kaua'i Hotel Performance, 2020 vs. 2019**



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