



September 2020 Hawaii Hotel Performance Report

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

According to the *Hawaii Hotel Performance Report* published by the Hawaii Tourism Authority's (HTA) Research Division, statewide RevPAR decreased to \$29 (-85.0%), ADR fell to \$149 (-39.5%), and occupancy declined to 19.6 percent (-59.4 percentage points) (Figure 1) in September.

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 September, Hawaii hotel room revenues statewide fell by 91.4 percent to \$26.6 million. Room demand was 85.8 percent lower than the same period a year ago. Room supply decreased by 43.0 percent year-over-year (Figure 2). Many properties closed or reduced operations starting in April. During September, all passengers arriving from out-of-state, as well as traveling interisland to the counties of Kaua'i, Hawaii, Maui, and Kalawao (Moloka'i), were required to abide by a mandatory 14-day self-quarantine. If occupancy for September 2020 was calculated based on the room supply from September 2019, occupancy would be 11.2 percent for the month (Figure 5).

All classes of Hawaii hotel properties statewide reported RevPAR losses in September compared to a year ago. Luxury Class properties earned RevPAR of \$15 (-95.4%), with ADR at \$266 (-41.6%) and occupancy of 5.6 percent (-65.2 percentage points). Midscale & Economy Class properties earned the highest RevPAR (\$42, -67.5%) among the classes due to comparatively higher occupancy of 36.3 percent (-44.5 percentage points).

All of Hawaii's four island counties reported lower RevPAR and occupancy. O'ahu hotels led the state for RevPAR at \$33 (-83.1%) in September, with ADR at \$152 (-32.6%) and occupancy of 21.3 percent (-63.6 percentage points). Waikiki hotels earned \$28 (-85.5%) in RevPAR with ADR at \$148 (-33.8%) and occupancy of 18.7 percent (-67.0 percentage points).

Maui County hotels earned RevPAR of \$24 (-89.4%), with ADR at \$149 (-52.9%) and occupancy of 16.5 percent (-56.6 percentage points).

Hotels on the island of Hawaii reported RevPAR of \$27 (-82.1%), with occupancy of 20.9 percent (-48.0 percentage points) and ADR at \$130 (-41.0%).

Kaua'i hotels earned RevPAR of \$23 (-86.2%) in September, with ADR at \$152 (-36.2%) and occupancy of 15.1 percent (-54.5 percentage points).

Comparison to Top U.S. Markets

In comparison to top U.S. markets during the first nine months of 2020, the Hawaiian Islands earned the highest RevPAR at \$116 (-49.2%) followed by the Miami/Hialeah market at \$95

(-36.3%) and San Francisco/San Mateo at \$85 (-59.7%) (Figure 20). Hawai'i also led the U.S. markets in ADR at \$273 (-2.8%) followed by Miami/Hialeah and San Francisco/San Mateo (Figure 21). Tampa/St. Petersburg, Florida topped the country in occupancy at 51.2 percent (-22.6 percentage points), followed by San Diego and Los Angeles/Long Beach, California (Figure 22). The Hawaiian Islands ranked 17th for occupancy at 42.5 percent (-38.8 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 year-to-date. Hotels in French Polynesia ranked highest in RevPAR at \$242 (-38.7%) followed by the Maldives, Maui County (\$167, -46.3%), Aruba, the island of Hawai'i (\$113, -44.5%), Kaua'i (\$103, -49.8%) and O'ahu (\$98, -51.3%) (Figure 23).

The Maldives led in ADR at \$745 (+39.7%) in the first nine months of 2020, followed by French Polynesia and Maui County (\$419, +5.5%). Kaua'i (\$274, -3.3%) the island of Hawai'i (\$255, -3.2%), and O'ahu (\$224, -6.2%) ranked sixth, seventh, and eighth, respectively (Figure 24).

The island of Hawai'i led in occupancy for sun and sea destinations year-to-date (44.3%, -33.0 percentage points), followed by O'ahu (43.9%, -40.7 percentage points), French Polynesia, Maui County (39.9%, -38.5 percentage points) and Kaua'i (37.8%, -34.9 percentage points) (Figure 25).

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 September, the survey included 85 properties representing 20,600 rooms, or 38.4 percent of all lodging properties and 67.7 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 September 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	19.6%	78.9%	-59.4%	\$148.80	\$246.00	-39.5%	\$29.15	\$194.20	-85.0%
Luxury Class	5.6%	70.9%	-65.2%	\$266.21	\$456.01	-41.6%	\$14.94	\$323.13	-95.4%
Upper Upscale Class	15.9%	80.0%	-64.1%	\$174.10	\$251.66	-30.8%	\$27.63	\$201.29	-86.3%
Upscale Class	16.4%	79.5%	-63.1%	\$155.88	\$191.96	-18.8%	\$25.63	\$152.66	-83.2%
Upper Midscale Class	25.5%	83.3%	-57.8%	\$138.84	\$156.24	-11.1%	\$35.36	\$130.15	-72.8%
Midscale & Economy Class	36.3%	80.8%	-44.5%	\$114.98	\$158.95	-27.7%	\$41.70	\$128.40	-67.5%
O'ahu	21.3%	84.9%	-63.6%	\$152.47	\$226.26	-32.6%	\$32.54	\$192.15	-83.1%
Waikiki	18.7%	85.7%	-67.0%	\$148.43	\$224.05	-33.8%	\$27.82	\$192.11	-85.5%
Other O'ahu	35.2%	80.0%	-44.8%	\$163.96	\$240.61	-31.9%	\$57.70	\$192.39	-70.0%
O'ahu Luxury	NA	74.2%	NA	NA	\$450.07	NA	NA	\$333.99	NA
O'ahu Upper Upscale	17.0%	85.7%	-68.7%	\$177.67	\$246.01	-27.8%	\$30.19	\$210.91	-85.7%
O'ahu Upscale	23.1%	88.0%	-64.9%	\$164.24	\$192.64	-14.7%	\$38.00	\$169.53	-77.6%
O'ahu Upper Midscale	25.0%	83.9%	-58.9%	\$137.93	\$153.33	-10.0%	\$34.43	\$128.61	-73.2%
O'ahu Midscale & Economy	35.3%	88.5%	-53.2%	\$118.60	\$131.31	-9.7%	\$41.83	\$116.23	-64.0%
Maui County	16.5%	73.1%	-56.6%	\$148.69	\$316.01	-52.9%	\$24.48	\$230.88	-89.4%
Wailea	NA	82.4%	NA	NA	\$460.63	NA	NA	\$379.64	NA
Lahaina/Kā'anapali/Kapalua	9.7%	71.8%	-62.2%	\$100.98	\$276.04	-63.4%	\$9.77	\$198.29	-95.1%
Other Maui County	25.0%	74.6%	-49.6%	\$171.94	\$364.45	-52.8%	\$43.03	\$271.90	-84.2%
Maui County Luxury	NA	73.8%	NA	NA	\$483.79	NA	NA	\$357.22	NA
Maui County Upper Upscale & Upscale	9.3%	73.2%	-63.9%	\$166.48	\$261.97	-36.4%	\$15.45	\$191.64	-91.9%
Island of Hawai'i	20.9%	68.8%	-48.0%	\$130.43	\$221.21	-41.0%	\$27.19	\$152.25	-82.1%
Kohala Coast	NA	66.6%	NA	NA	\$309.06	NA	NA	\$205.89	NA
Kaua'i	15.1%	69.6%	-54.5%	\$152.12	\$238.41	-36.2%	\$22.93	\$165.86	-86.2%

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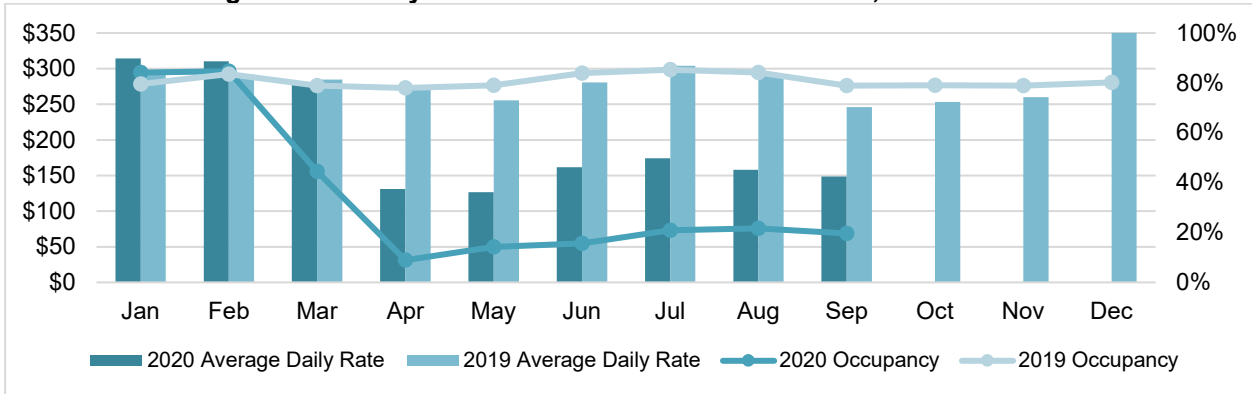
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	913.1	1,601.4	-43.0%	178.9	1,264.2	-85.8%	26.6	311.0	-91.4%
O'ahu	508.3	902.1	-43.7%	108.5	766.1	-85.8%	16.5	173.3	-90.5%
Waikiki	428.0	774.2	-44.7%	80.2	663.8	-87.9%	11.9	148.7	-92.0%
Maui County	198.6	373.3	-46.8%	32.7	272.7	-88.0%	4.9	86.2	-94.4%
Wailea	NA	65.8	NA	NA	54.2	NA	NA	25.0	NA
Lahaina/Kā'anapali/Kapalua	110.8	208.0	-46.7%	10.7	149.4	-92.8%	1.1	41.2	-97.4%
Island of Hawai'i	114.8	191.2	-39.9%	23.9	131.6	-81.8%	3.1	29.1	-89.3%
Kohala Coast	NA	88.2	NA	NA	58.8	NA	NA	18.2	NA
Kaua'i	91.3	134.8	-32.3%	13.8	93.8	-85.3%	2.1	22.4	-90.6%

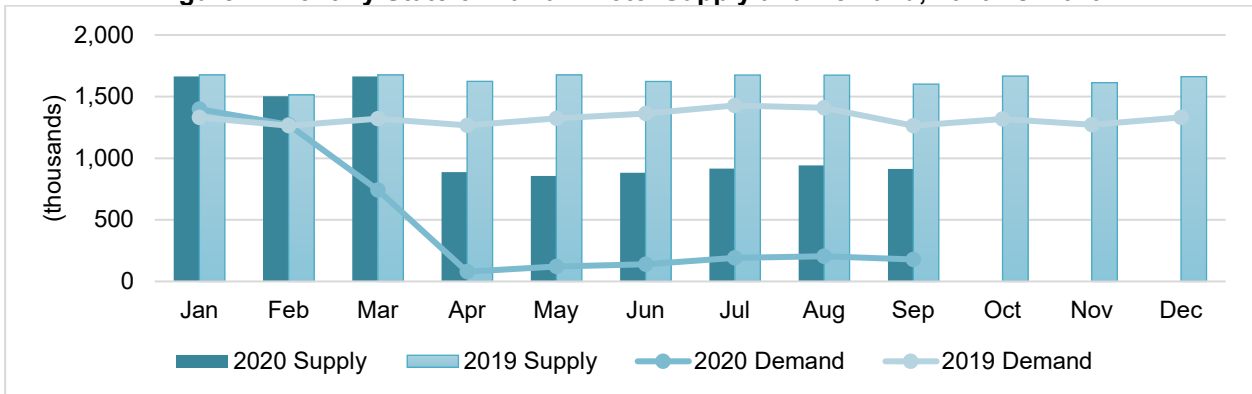
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Figure 3: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019



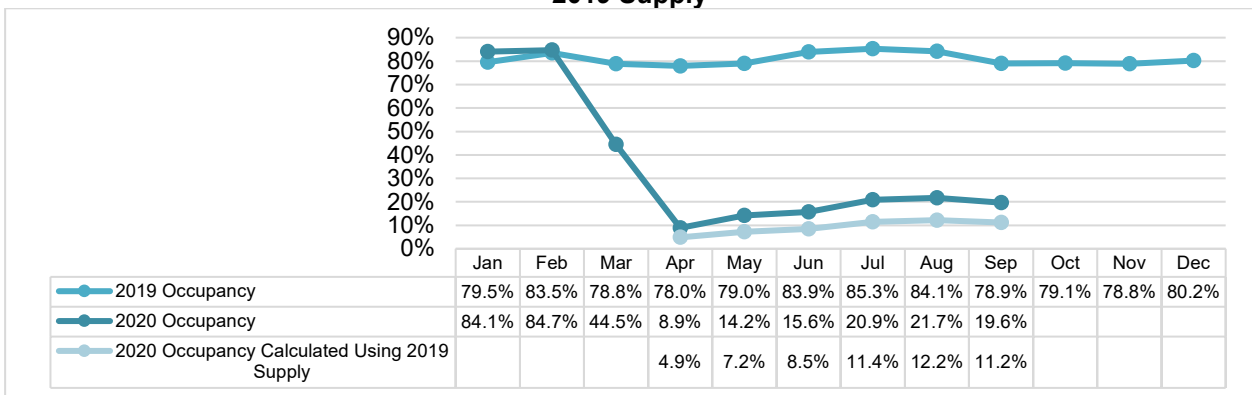
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Figure 4: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019



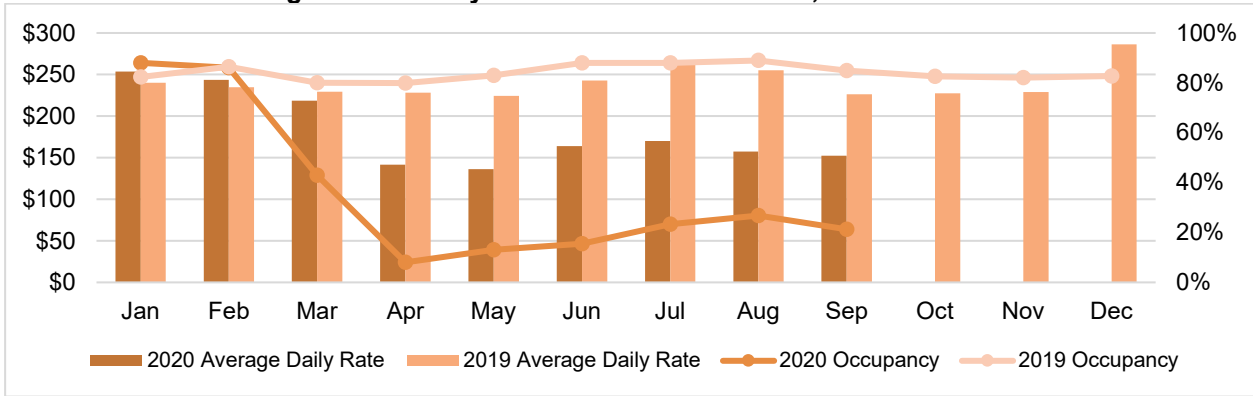
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Figure 5: Monthly State of Hawai'i Hotel Occupancy, 2020 vs. 2019 and 2020 Calculated with 2019 Supply



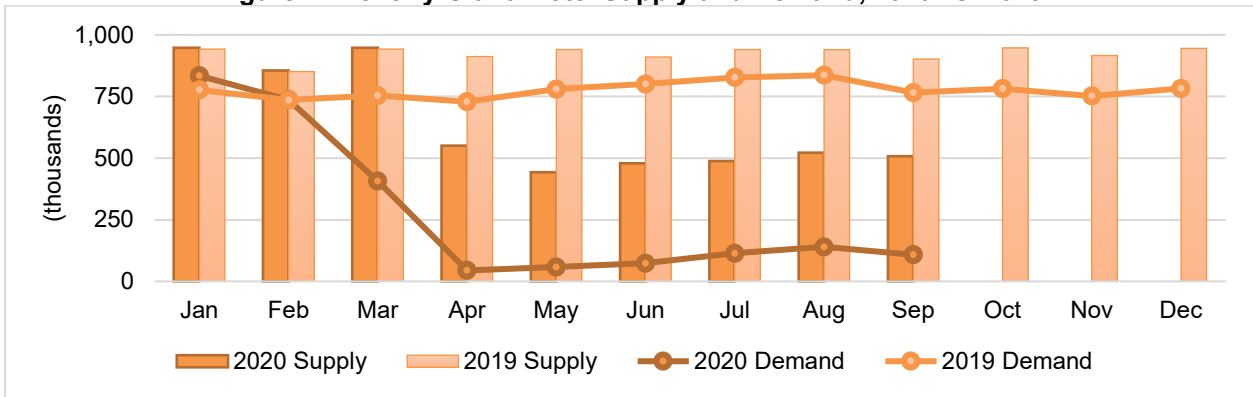
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Figure 6: Monthly O'ahu Hotel Performance, 2020 vs. 2019



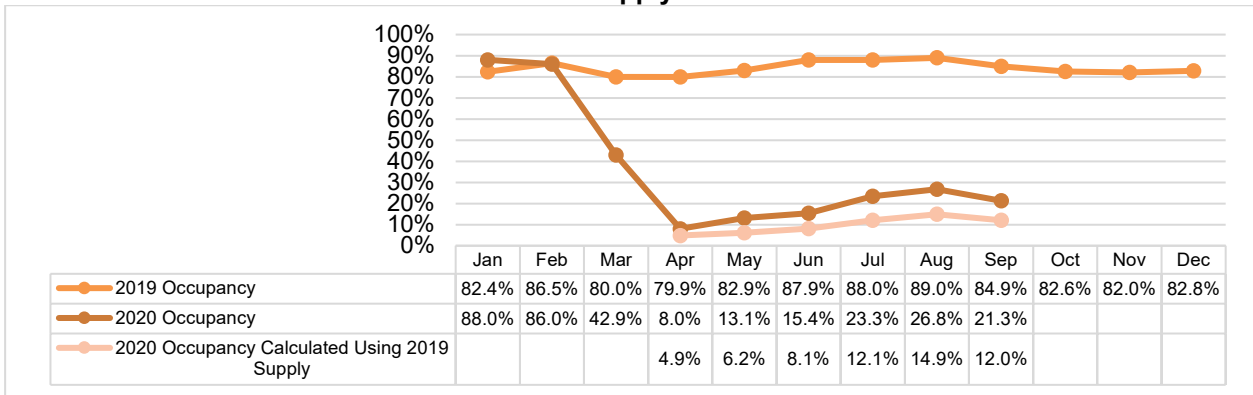
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Figure 7: Monthly O'ahu Hotel Supply and Demand, 2020 vs. 2019



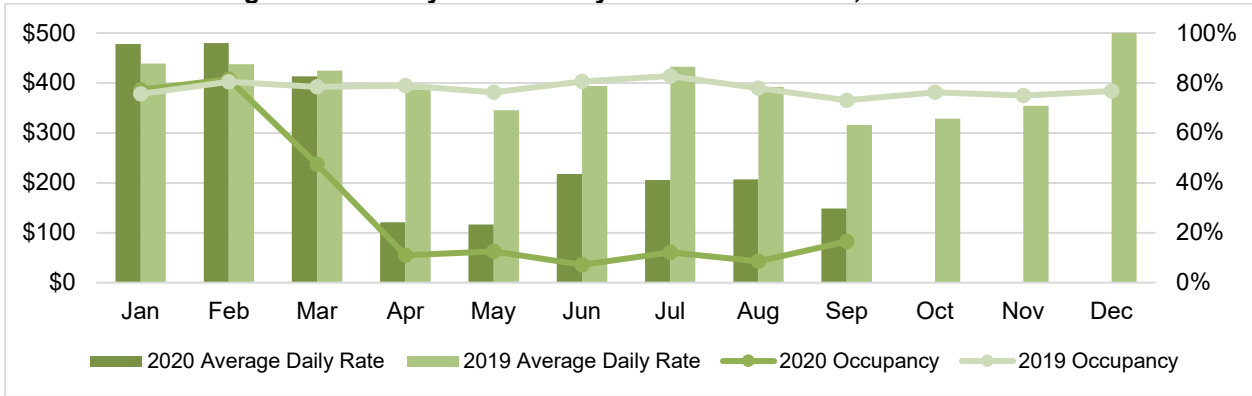
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Figure 8: Monthly O'ahu Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply



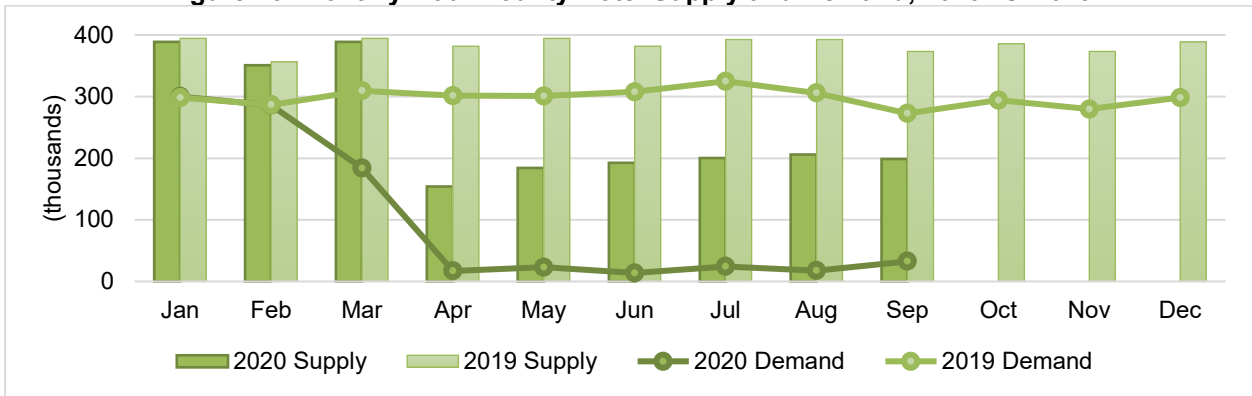
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Figure 9: Monthly Maui County Hotel Performance, 2020 vs. 2019



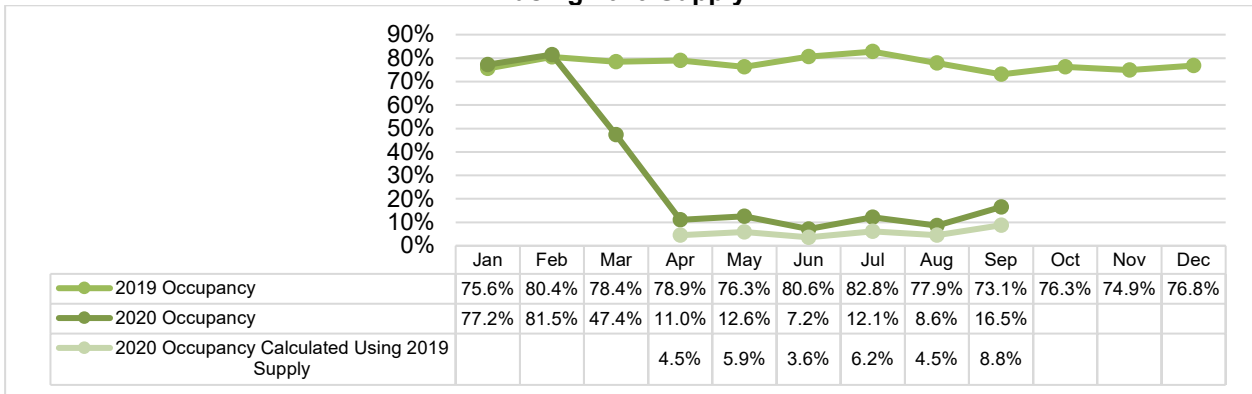
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Figure 10: Monthly Maui County Hotel Supply and Demand, 2020 vs. 2019



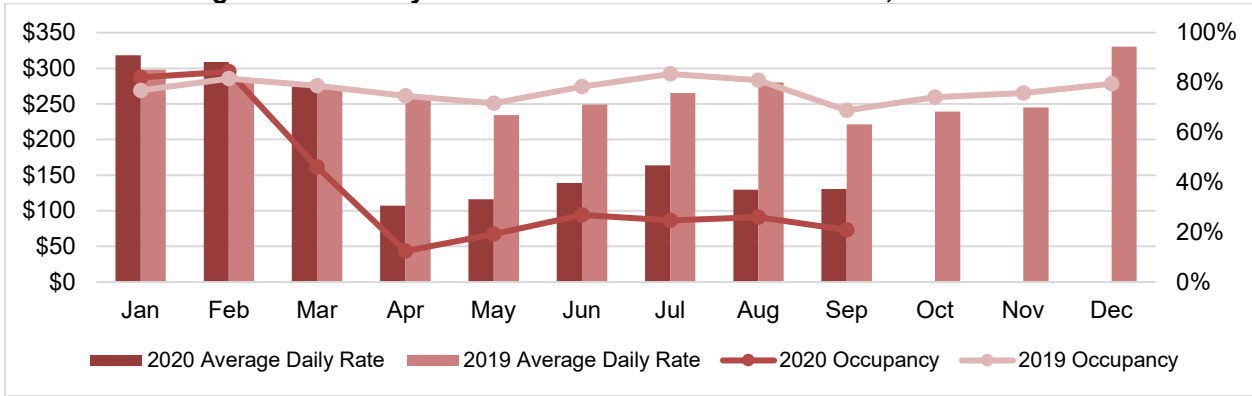
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Figure 11: Monthly Maui County Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply



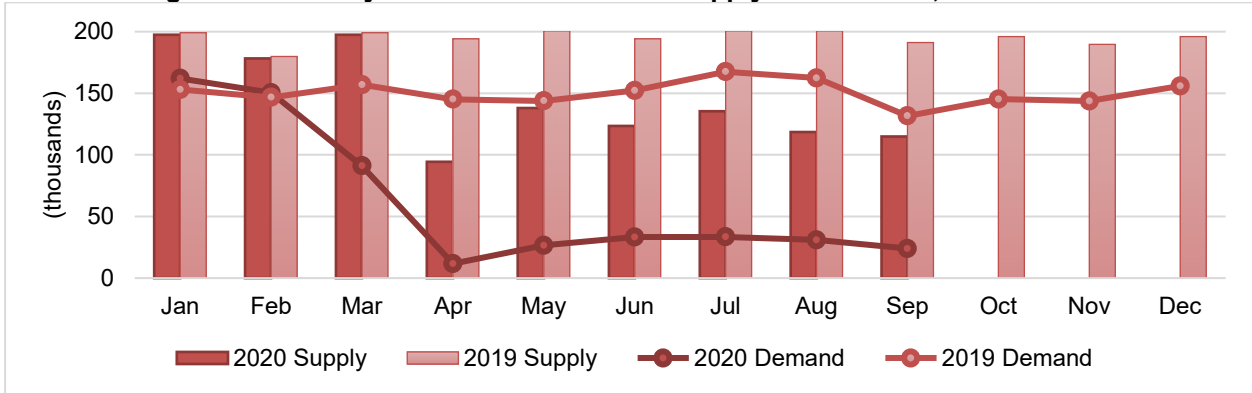
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Figure 12: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019



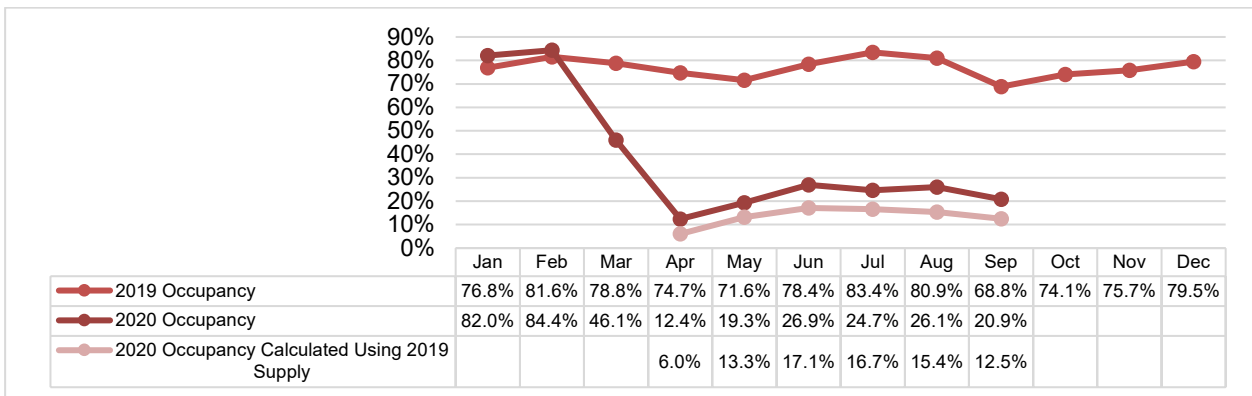
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Figure 13: Monthly Island of Hawai'i Hotel Supply and Demand, 2020 vs. 2019



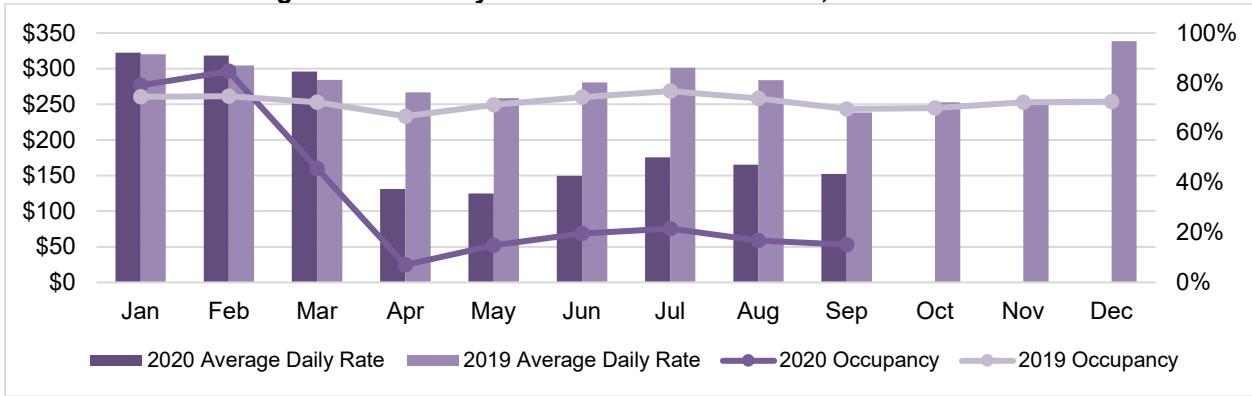
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Figure 14: Monthly Island of Hawai'i Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply



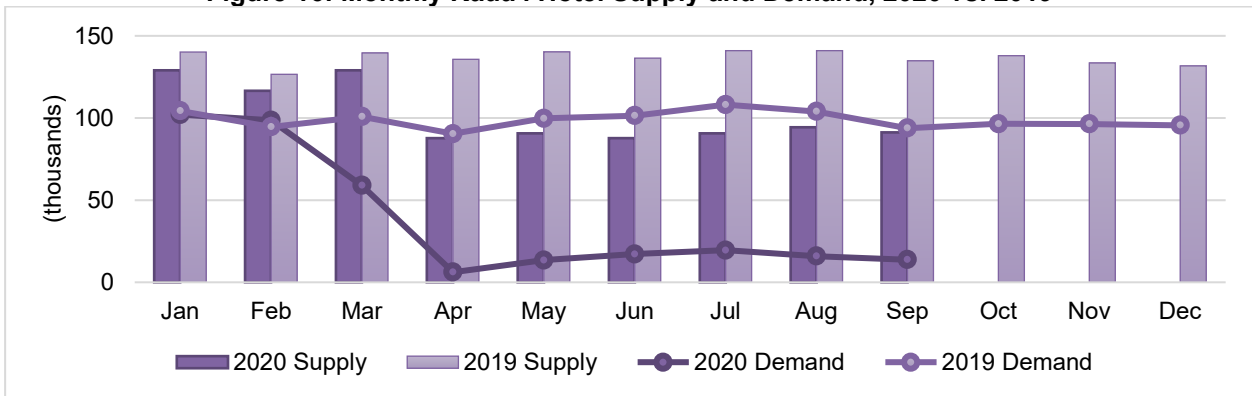
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Figure 15: Monthly Kaua'i Hotel Performance, 2020 vs. 2019



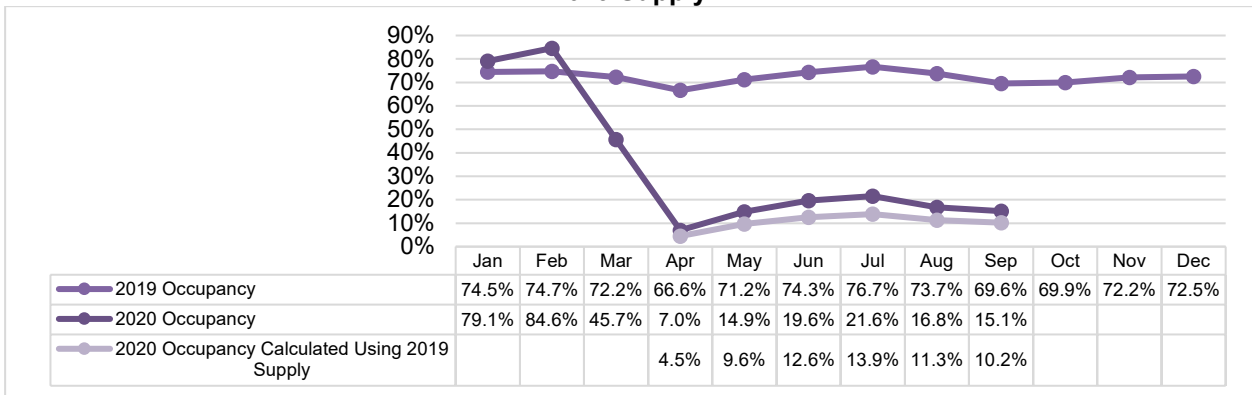
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Figure 16: Monthly Kaua'i Hotel Supply and Demand, 2020 vs. 2019



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Figure 17: Monthly Kauai Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply



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Figure 18: Hawai'i Hotel Performance Year-to-Date September 2020

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	42.5%	81.3%	-38.8%	\$272.54	\$280.51	-2.8%	\$115.85	\$227.96	-49.2%
Luxury Class	44.9%	77.0%	-32.1%	\$614.77	\$558.51	10.1%	\$275.95	\$430.19	-35.9%
Upper Upscale Class	46.5%	83.2%	-36.7%	\$281.39	\$280.22	0.4%	\$130.72	\$233.09	-43.9%
Upscale Class	35.3%	78.7%	-43.4%	\$213.78	\$209.10	2.2%	\$75.43	\$164.52	-54.2%
Upper Midscale Class	42.0%	84.3%	-42.3%	\$164.49	\$163.62	0.5%	\$69.05	\$137.93	-49.9%
Midscale & Economy Class	48.2%	82.5%	-34.4%	\$164.09	\$173.54	-5.4%	\$79.02	\$143.18	-44.8%
O'ahu	43.9%	84.6%	-40.7%	\$223.70	\$238.47	-6.2%	\$98.29	\$201.83	-51.3%
Waikiki	42.4%	84.9%	-42.5%	\$222.63	\$233.38	-4.6%	\$94.43	\$198.14	-52.3%
Other O'ahu	52.1%	83.0%	-30.9%	\$228.38	\$270.05	-15.4%	\$118.99	\$224.26	-46.9%
O'ahu Luxury	NA	74.2%	NA	NA	\$491.56	NA	NA	\$364.53	NA
O'ahu Upper Upscale	46.3%	86.0%	-39.7%	\$252.59	\$262.05	-3.6%	\$116.94	\$225.35	-48.1%
O'ahu Upscale	42.2%	85.2%	-43.1%	\$194.01	\$195.73	-0.9%	\$81.80	\$166.81	-51.0%
O'ahu Upper Midscale	41.4%	84.7%	-43.3%	\$157.87	\$157.86	0.0%	\$65.43	\$133.74	-51.1%
O'ahu Midscale & Economy	56.1%	87.9%	-31.8%	\$130.13	\$133.34	-2.4%	\$72.98	\$117.21	-37.7%
Maui County	39.9%	78.3%	-38.5%	\$418.52	\$396.82	5.5%	\$166.79	\$310.83	-46.3%
Wailea	NA	89.2%	NA	NA	\$609.03	NA	NA	\$543.50	NA
Lahaina/Kā'anapali/Kapalua	35.7%	77.5%	-41.8%	\$369.62	\$334.07	10.6%	\$132.06	\$258.94	-49.0%
Other Maui County	45.1%	79.4%	-34.3%	\$467.88	\$475.11	-1.5%	\$211.05	\$377.12	-44.0%
Maui County Luxury	NA	81.1%	NA	NA	\$645.42	NA	NA	\$523.71	NA
Maui County Upper Upscale & Upscale	36.1%	78.2%	-42.1%	\$351.73	\$315.58	11.5%	\$127.01	\$246.75	-48.5%
Island of Hawai'i	44.3%	77.2%	-33.0%	\$254.96	\$263.49	-3.2%	\$112.90	\$203.53	-44.5%
Kohala Coast	NA	78.0%	NA	NA	\$374.16	NA	NA	\$292.00	NA
Kaua'i	37.8%	72.7%	-34.9%	\$273.82	\$283.14	-3.3%	\$103.37	\$205.75	-49.8%

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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 19: Hawai'i Hotel Performance by Measure Year-to-Date September 2020

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
State of Hawai'i	10,175.1	14,741.0	-31.0%	4,325.2	11,979.5	-63.9%	1,178.8	3,360.4	-64.9%
O'ahu	5,726.3	8,277.7	-30.8%	2,516.0	7,006.1	-64.1%	562.8	1,670.7	-66.3%
Waikiki	4,826.0	7,107.0	-32.1%	2,046.9	6,033.9	-66.1%	455.7	1,408.2	-67.6%
Maui County	2,272.3	3,461.8	-34.4%	905.6	2,711.6	-66.6%	379.0	1,076.0	-64.8%
Wailea	NA	599.0	NA	NA	534.5	NA	NA	325.5	NA
Lahaina/Kā'anapali/Kapalua	1,273.2	1,941.8	-34.4%	454.9	1,505.1	-69.8%	168.1	502.8	-66.6%
Island of Hawai'i	1,255.5	1,764.1	-28.8%	556.0	1,362.7	-59.2%	141.7	359.1	-60.5%
Kohala Coast	NA	817.2	NA	NA	637.7	NA	NA	238.6	NA
Kaua'i	921.0	1,237.4	-25.6%	347.7	899.2	-61.3%	95.2	254.6	-62.6%

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Figure 20: Top 5 U.S. Markets – Revenue Per Available Room – YTD September 2020

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$115.85	-49.2%
2	Miami/Hialeah, FL	\$94.89	-36.3%
3	San Francisco/San Mateo, CA	\$84.51	-59.7%
4	New York, NY	\$77.35	-62.5%
5	Los Angeles/Long Beach, CA	\$72.80	-50.5%

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Figure 21: Top 5 U.S. Markets – Average Daily Rate – YTD September 2020

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$272.54	-2.8%
2	Miami/Hialeah, FL	\$201.12	2.9%
3	San Francisco/San Mateo, CA	\$190.93	-24.5%
4	New York, NY	\$155.89	-35.5%
5	Los Angeles/Long Beach, CA	\$143.65	-21.1%

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Figure 22: Top 5 U.S. Markets – Occupancy – YTD September 2020

Rank	Destination	Occupancy	Percentage Pt. Change
1	Tampa/St Petersburg, FL	51.2%	-22.6%
2	San Diego, CA	50.9%	-28.1%
3	Los Angeles/Long Beach, CA	50.7%	-30.1%
4	Phoenix, AZ	50.1%	-21.0%
5	Norfolk/Virginia Beach, VA	50.0%	-16.1%
17	Hawaiian Islands	42.5%	-38.8%

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Figure 23: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD September 2020

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$242.04	-38.7%
2	Maldives	\$228.75	-35.2%
3	Maui	\$166.79	-46.3%
4	Aruba	\$150.66	-42.7%
5	Hawai'i Island	\$112.90	-44.5%
6	Kaua'i	\$103.37	-49.8%
7	O'ahu	\$98.29	-51.3%
8	Cabo San Lucas+	\$92.96	-40.5%
9	Puerto Rico	\$67.39	-52.3%
10	Cancun+	\$63.28	-50.9%
11	Costa Rica	\$58.09	-50.7%
12	Phuket	\$43.48	-48.6%
13	Puerto Vallarta+	\$31.17	-47.9%
14	Fiji	\$30.53	-73.8%
15	Bali	\$20.52	-73.0%

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Figure 24: Competitive Sun and Sea Destinations – Average Daily Rate – YTD September 2020

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$745.40	39.7%
2	French Polynesia	\$555.35	-1.8%
3	Maui	\$418.52	5.5%
4	Aruba	\$406.26	17.7%
5	Cabo San Lucas+	\$318.84	0.5%
6	Kaua'i	\$273.82	-3.3%
7	Hawai'i Island	\$254.96	-3.2%
8	O'ahu	\$223.70	-6.2%
9	Puerto Rico	\$202.97	-5.0%
10	Cancun+	\$191.89	2.1%
11	Costa Rica	\$186.63	5.7%
12	Phuket	\$147.22	22.1%
13	Fiji	\$109.26	-32.1%
14	Bali	\$93.64	-14.3%
15	Puerto Vallarta+	\$87.76	-1.3%

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Figure 25: Competitive Sun and Sea Destinations – Occupancy – YTD September 2020

Rank	Destination	Occupancy	Percentage Pt. Change
1	Hawai'i Island	44.3%	-33.0%
2	O'ahu	43.9%	-40.7%
3	French Polynesia	43.6%	-26.2%
4	Maui	39.9%	-38.5%
5	Kaua'i	37.8%	-34.9%
6	Aruba	37.1%	-39.1%
7	Puerto Vallarta+	35.5%	-31.8%
8	Puerto Rico	33.2%	-33.0%
9	Cancun+	33.0%	-35.6%
10	Costa Rica	31.1%	-35.6%
11	Maldives	30.7%	-35.5%
12	Phuket	29.5%	-40.6%
13	Cabo San Lucas+	29.2%	-20.1%
14	Fiji	27.9%	-44.3%
15	Bali	21.9%	-47.7%

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