



## October 2020 Hawaii Hotel Performance Report

In October 2020, Hawaii hotels statewide reported substantial declines in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to October 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 \$34 (-83.1%), ADR fell to \$174 (-31.8%), and occupancy declined to 19.7 percent (-59.8 percentage points) (Figure 1) in October. 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.

Hawaii hotel room revenues statewide fell to \$39.0 million (-88.4%) in October. Room demand was 224,300 room nights, or 83.0 percent lower than the same period a year ago. Room supply was 1.1 million room nights (-31.5%) (Figure 2). Many properties closed or reduced operations starting in April.

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner. All other trans-Pacific travelers continued to be subject to the 14-day self-quarantine during October. The counties of Kaua'i, Hawaii, Maui, and Kalawao (Moloka'i) also had a partial quarantine in October. In addition, Lāna'i residents and visitors were under a stay-at-home order that began on October 27. If occupancy for October 2020 was calculated based on the room supply from October 2019, occupancy would be 13.5 percent for the month (Figure 7).

All classes of Hawaii hotel properties statewide reported RevPAR losses in October compared to a year ago. Luxury Class properties earned RevPAR of \$57 (-83.8%), with ADR at \$308 (-35.3%) and occupancy of 18.5 percent (-55.4 percentage points). Midscale & Economy Class properties earned RevPAR of \$38 (-70.9%) and occupancy of 30.9 percent (-50.2 percentage points).

All of Hawaii's four island counties reported lower RevPAR, ADR and occupancy compared to a year ago. Kaua'i hotels earned the highest October RevPAR at \$45 (-75.3%), with ADR at \$212 (-16.3%) and occupancy of 21.3 percent (-51.0 percentage points).

O'ahu hotels earned RevPAR of \$35 (-81.7%) in October, with ADR at \$158 (-30.9%) and occupancy of 22.0 percent (-60.9 percentage points). Waikīkī hotels earned \$30 (-83.9%) in RevPAR with ADR at \$155 (-31.5%) and occupancy of 19.5 percent (-63.8 percentage points).

Maui County hotels earned RevPAR of \$32 (-87.6%), with ADR at \$226 (-33.0%) and occupancy of 14.2 percent (-62.2 percentage points). Data for the month of October was not available for Maui's luxury resort region of Wailea. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$16 (-92.7%), ADR at \$262 (-9.6%) and occupancy of 6.0 percent (-68.0 percentage points).

Hotels on the island of Hawai'i reported RevPAR of \$28 (-84.3%), with ADR at \$140 (-41.1%) and occupancy of 19.8 percent (-54.3 percentage points). Kohala Coast hotels earned RevPAR of \$5 (-97.7%), ADR at \$141 (-56.1%) and occupancy of 3.8 percent (-69.3 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 October, the survey included 106 properties representing 27,196 rooms, or 50.7 percent of all lodging properties and 74.0 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 October 2020**

|                                     | Occupancy % |       |                       | Average Daily Rate |          |          | RevPAR  |          |          |
|-------------------------------------|-------------|-------|-----------------------|--------------------|----------|----------|---------|----------|----------|
|                                     | 2020        | 2019  | Percentage Pt. Change | 2020               | 2019     | % Change | 2020    | 2019     | % Change |
| <b>State of Hawai'i</b>             | 19.7%       | 79.4% | -59.8%                | \$174.12           | \$255.49 | -31.8%   | \$34.26 | \$202.96 | -83.1%   |
| Luxury Class                        | 18.5%       | 73.9% | -55.4%                | \$308.10           | \$475.84 | -35.3%   | \$56.87 | \$351.64 | -83.8%   |
| Upper Upscale Class                 | 15.8%       | 80.0% | -64.2%                | \$183.08           | \$259.91 | -29.6%   | \$28.97 | \$207.94 | -86.1%   |
| Upscale Class                       | 17.4%       | 80.9% | -63.4%                | \$166.70           | \$199.28 | -16.3%   | \$29.03 | \$161.14 | -82.0%   |
| Upper Midscale Class                | 25.8%       | 80.7% | -54.9%                | \$140.70           | \$155.67 | -9.6%    | \$36.32 | \$125.61 | -71.1%   |
| Midscale & Economy Class            | 30.9%       | 81.2% | -50.2%                | \$123.24           | \$161.09 | -23.5%   | \$38.10 | \$130.72 | -70.9%   |
| <b>O'ahu</b>                        | 22.0%       | 82.8% | -60.9%                | \$157.71           | \$228.10 | -30.9%   | \$34.63 | \$188.90 | -81.7%   |
| Waikiki                             | 19.5%       | 83.3% | -63.8%                | \$155.24           | \$226.52 | -31.5%   | \$30.28 | \$188.64 | -83.9%   |
| Other O'ahu                         | 35.5%       | 80.1% | -44.6%                | \$165.22           | \$237.70 | -30.5%   | \$58.61 | \$190.43 | -69.2%   |
| O'ahu Luxury                        | NA          | 72.9% | NA                    | NA                 | \$454.58 | NA       | NA      | \$331.53 | NA       |
| O'ahu Upper Upscale                 | 16.1%       | 83.3% | -67.2%                | \$174.94           | \$249.92 | -30.0%   | \$28.18 | \$208.31 | -86.5%   |
| O'ahu Upscale                       | 23.3%       | 87.5% | -64.2%                | \$168.78           | \$194.15 | -13.1%   | \$39.31 | \$169.86 | -76.9%   |
| O'ahu Upper Midscale                | 24.7%       | 80.6% | -55.9%                | \$139.06           | \$150.89 | -7.8%    | \$34.36 | \$121.57 | -71.7%   |
| O'ahu Midscale & Economy            | 39.1%       | 85.6% | -46.5%                | \$102.40           | \$125.90 | -18.7%   | \$40.06 | \$107.81 | -62.8%   |
| <b>Maui County</b>                  | 14.2%       | 76.4% | -62.2%                | \$226.15           | \$337.55 | -33.0%   | \$32.07 | \$257.82 | -87.6%   |
| Wailea                              | NA          | 88.4% | -88.4%                | NA                 | \$500.13 | NA       | NA      | \$442.31 | NA       |
| Lahaina/Kā'anapali/Kapalua          | 6.0%        | 74.0% | -68.0%                | \$261.70           | \$289.47 | -9.6%    | \$15.72 | \$214.15 | -92.7%   |
| Other Maui County                   | 26.1%       | 79.4% | -53.3%                | \$214.19           | \$393.92 | -45.6%   | \$55.98 | \$312.78 | -82.1%   |
| Maui County Luxury                  | 18.0%       | 78.7% | -60.7%                | \$316.11           | \$512.30 | -38.3%   | \$56.96 | \$403.06 | -85.9%   |
| Maui County Upper Upscale & Upscale | 10.5%       | 75.9% | -65.4%                | \$208.07           | \$278.67 | -25.3%   | \$21.87 | \$211.47 | -89.7%   |
| <b>Island of Hawai'i</b>            | 19.8%       | 74.0% | -54.3%                | \$140.44           | \$238.34 | -41.1%   | \$27.78 | \$176.49 | -84.3%   |
| Kohala Coast                        | 3.8%        | 73.1% | -69.3%                | \$140.63           | \$320.62 | -56.1%   | \$5.33  | \$234.36 | -97.7%   |
| <b>Kaua'i</b>                       | 21.3%       | 72.3% | -51.0%                | \$212.18           | \$253.58 | -16.3%   | \$45.22 | \$183.30 | -75.3%   |

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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 October 2020**

|                            | Supply (thousands) |         |          | Demand (thousands) |         |          | Revenue (millions) |       |          |
|----------------------------|--------------------|---------|----------|--------------------|---------|----------|--------------------|-------|----------|
|                            | 2020               | 2019    | % Change | 2020               | 2019    | % Change | 2020               | 2019  | % Change |
| <b>State of Hawai'i</b>    | 1,139.8            | 1,663.2 | -31.5%   | 224.3              | 1,321.2 | -83.0%   | 39.0               | 337.6 | -88.4%   |
| <b>O'ahu</b>               | 609.6              | 946.8   | -35.6%   | 133.8              | 784.1   | -82.9%   | 21.1               | 178.9 | -88.2%   |
| Waikiki                    | 516.2              | 808.9   | -36.2%   | 100.7              | 673.6   | -85.1%   | 15.6               | 152.6 | -89.8%   |
| <b>Maui County</b>         | 289.0              | 385.7   | -25.1%   | 41.0               | 294.6   | -86.1%   | 9.3                | 99.4  | -90.7%   |
| Wailea                     | NA                 | 68.0    | NA       | NA                 | 60.2    | NA       | NA                 | 30.1  | NA       |
| Lahaina/Kā'anapali/Kapalua | 171.7              | 214.9   | -20.1%   | 10.3               | 159.0   | -93.5%   | 2.7                | 46.0  | -94.1%   |
| <b>Island of Hawai'i</b>   | 128.0              | 197.5   | -35.2%   | 25.3               | 146.3   | -82.7%   | 3.6                | 34.9  | -89.8%   |
| Kohala Coast               | 23.2               | 91.1    | -74.6%   | 0.9                | 66.6    | -98.7%   | 0.1                | 21.4  | -99.4%   |
| <b>Kaua'i</b>              | 113.1              | 133.1   | -15.0%   | 24.1               | 96.2    | -74.9%   | 5.1                | 24.4  | -79.0%   |

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

|                                     | Occupancy % |       |                       | Average Daily Rate |          |          | RevPAR   |          |          |
|-------------------------------------|-------------|-------|-----------------------|--------------------|----------|----------|----------|----------|----------|
|                                     | 2020        | 2019  | Percentage Pt. Change | 2020               | 2019     | % Change | 2020     | 2019     | % Change |
| <b>State of Hawai'i</b>             | 40.7%       | 81.1% | -40.4%                | \$267.70           | \$278.03 | -3.7%    | \$108.90 | \$225.43 | -51.7%   |
| Luxury Class                        | 45.4%       | 76.7% | -31.3%                | \$600.35           | \$550.39 | 9.1%     | \$272.49 | \$422.36 | -35.5%   |
| Upper Upscale Class                 | 43.7%       | 82.9% | -39.2%                | \$276.43           | \$277.47 | -0.4%    | \$120.76 | \$229.91 | -47.5%   |
| Upscale Class                       | 33.4%       | 78.9% | -45.5%                | \$211.45           | \$208.11 | 1.6%     | \$70.69  | \$164.18 | -56.9%   |
| Upper Midscale Class                | 40.8%       | 83.9% | -43.1%                | \$163.06           | \$162.84 | 0.1%     | \$66.60  | \$136.67 | -51.3%   |
| Midscale & Economy Class            | 46.5%       | 82.4% | -35.9%                | \$161.45           | \$172.28 | -6.3%    | \$75.04  | \$141.91 | -47.1%   |
| <b>O'ahu</b>                        | 42.6%       | 84.5% | -41.8%                | \$220.63           | \$237.42 | -7.1%    | \$94.04  | \$200.51 | -53.1%   |
| Waikiki                             | 41.1%       | 84.7% | -43.6%                | \$219.79           | \$232.69 | -5.5%    | \$90.37  | \$197.17 | -54.2%   |
| Other O'ahu                         | 50.5%       | 82.7% | -32.2%                | \$224.21           | \$266.74 | -15.9%   | \$113.31 | \$220.69 | -48.7%   |
| O'ahu Luxury                        | NA          | 74.0% | NA                    | NA                 | \$487.84 | NA       | NA       | \$361.16 | NA       |
| O'ahu Upper Upscale                 | 43.5%       | 85.7% | -42.2%                | \$249.90           | \$260.83 | -4.2%    | \$108.64 | \$223.58 | -51.4%   |
| O'ahu Upscale                       | 40.1%       | 85.5% | -45.3%                | \$192.87           | \$195.57 | -1.4%    | \$77.43  | \$167.12 | -53.7%   |
| O'ahu Upper Midscale                | 40.3%       | 84.3% | -44.0%                | \$156.76           | \$157.18 | -0.3%    | \$63.19  | \$132.50 | -52.3%   |
| O'ahu Midscale & Economy            | 54.6%       | 87.7% | -33.1%                | \$128.39           | \$132.60 | -3.2%    | \$70.10  | \$116.26 | -39.7%   |
| <b>Maui County</b>                  | 37.1%       | 78.1% | -41.0%                | \$408.54           | \$391.01 | 4.5%     | \$151.76 | \$305.51 | -50.3%   |
| Wailea                              | NA          | 89.2% | NA                    | NA                 | \$598.01 | NA       | NA       | \$533.18 | NA       |
| Lahaina/Kā'anapali/Kapalua          | 32.2%       | 77.2% | -45.0%                | \$367.22           | \$329.81 | 11.3%    | \$118.24 | \$254.47 | -53.5%   |
| Other Maui County                   | 43.6%       | 79.4% | -35.8%                | \$448.07           | \$466.90 | -4.0%    | \$195.14 | \$370.62 | -47.3%   |
| Maui County Luxury                  | NA          | 80.9% | NA                    | NA                 | \$630.64 | NA       | NA       | \$510.16 | NA       |
| Maui County Upper Upscale & Upscale | 33.7%       | 77.9% | -44.2%                | \$342.58           | \$310.04 | 10.5%    | \$115.61 | \$241.63 | -52.2%   |
| <b>Island of Hawai'i</b>            | 42.0%       | 76.9% | -34.9%                | \$249.97           | \$261.05 | -4.2%    | \$105.03 | \$200.81 | -47.7%   |
| Kohala Coast                        | NA          | 77.5% | NA                    | NA                 | \$369.10 | NA       | \$0.00   | \$286.21 | NA       |
| <b>Kaua'i</b>                       | 36.0%       | 72.6% | -36.7%                | \$269.82           | \$280.28 | -3.7%    | \$97.01  | \$203.57 | -52.3%   |

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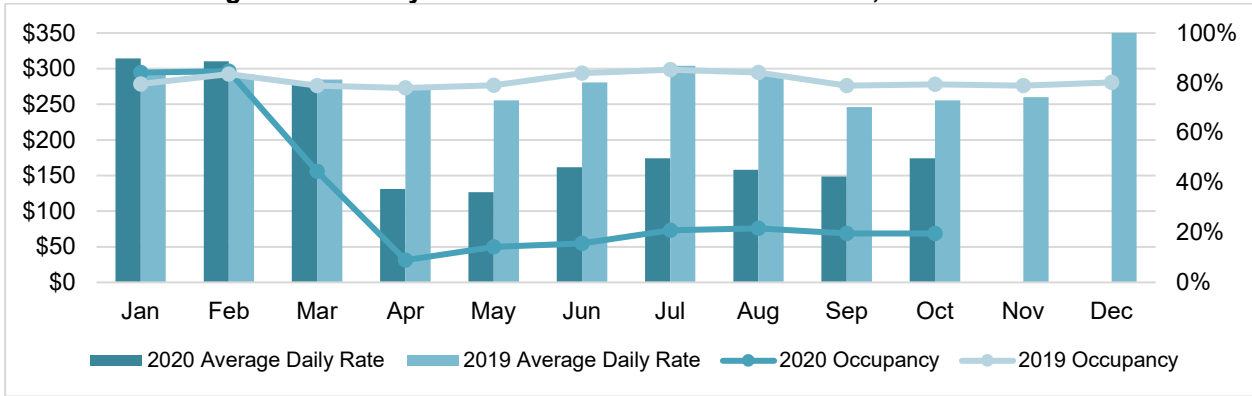
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

|                            | Supply (thousands) |          |          | Demand (thousands) |          |          | Revenue (millions) |         |          |
|----------------------------|--------------------|----------|----------|--------------------|----------|----------|--------------------|---------|----------|
|                            | 2020               | 2019     | % Change | 2020               | 2019     | % Change | 2020               | 2019    | % Change |
| <b>State of Hawai'i</b>    | 11,182.6           | 16,404.1 | -31.8%   | 4,549.0            | 13,300.7 | -65.8%   | 1,217.8            | 3,697.9 | -67.1%   |
| <b>O'ahu</b>               | 6,203.6            | 9,224.5  | -32.7%   | 2,644.3            | 7,790.2  | -66.1%   | 583.4              | 1,849.6 | -68.5%   |
| Waikiki                    | 5,209.9            | 7,915.9  | -34.2%   | 2,142.1            | 6,707.5  | -68.1%   | 470.8              | 1,560.8 | -69.8%   |
| <b>Maui County</b>         | 2,561.4            | 3,847.5  | -33.4%   | 951.5              | 3,006.2  | -68.3%   | 388.7              | 1,175.5 | -66.9%   |
| Wailea                     | NA                 | 667.0    | NA       | NA                 | 594.7    | NA       | NA                 | 355.6   | NA       |
| Lahaina/Kā'anapali/Kapalua | 1,444.9            | 2,156.7  | -33.0%   | 465.2              | 1,664.1  | -72.0%   | 170.8              | 548.8   | -68.9%   |
| <b>Island of Hawai'i</b>   | 1,383.5            | 1,961.6  | -29.5%   | 581.3              | 1,508.9  | -61.5%   | 145.3              | 393.9   | -63.1%   |
| Kohala Coast               | NA                 | 908.3    | NA       | NA                 | 704.4    | NA       | NA                 | 260.0   | NA       |
| <b>Kaua'i</b>              | 1,034.1            | 1,370.5  | -24.5%   | 371.8              | 995.4    | -62.6%   | 100.3              | 279.0   | -64.0%   |

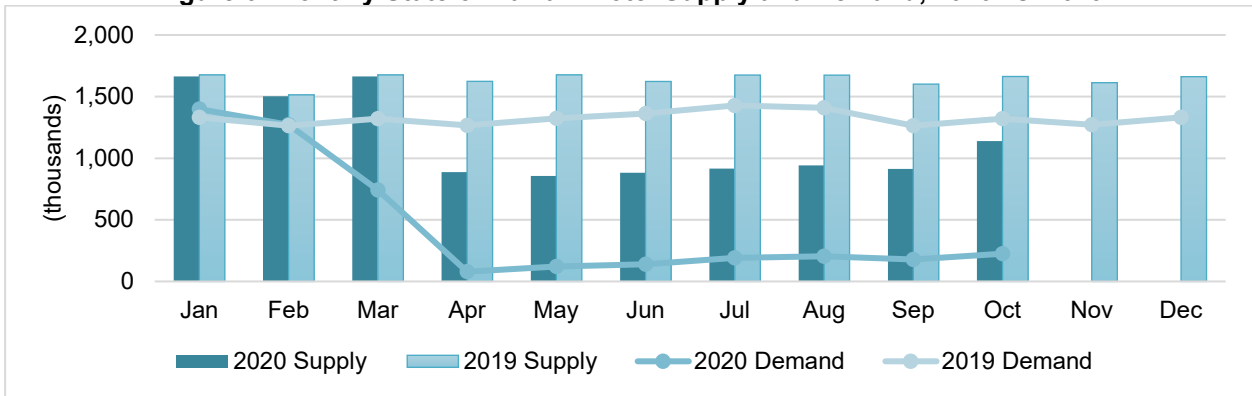
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**Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019**



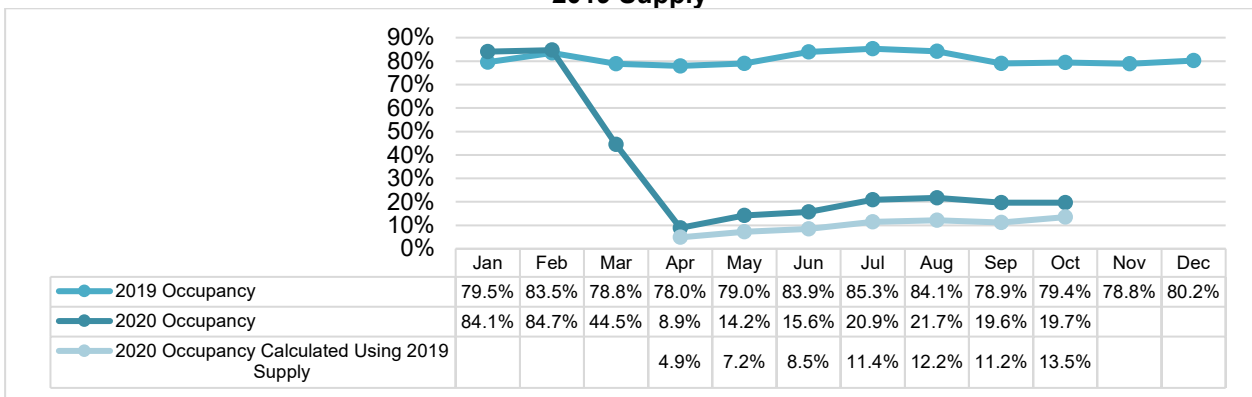
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**Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



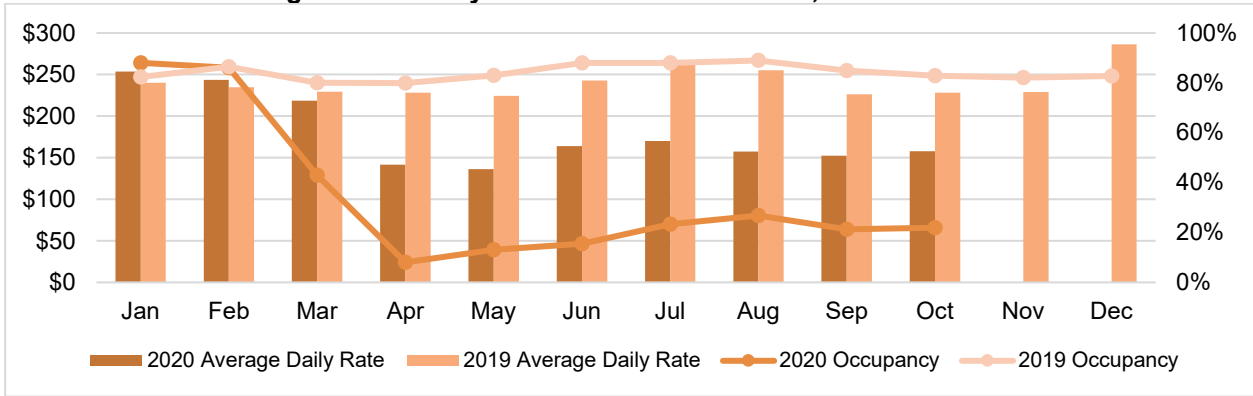
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**Figure 7: Monthly State of Hawai'i Hotel Occupancy, 2020 vs. 2019 and 2020 Calculated with 2019 Supply**



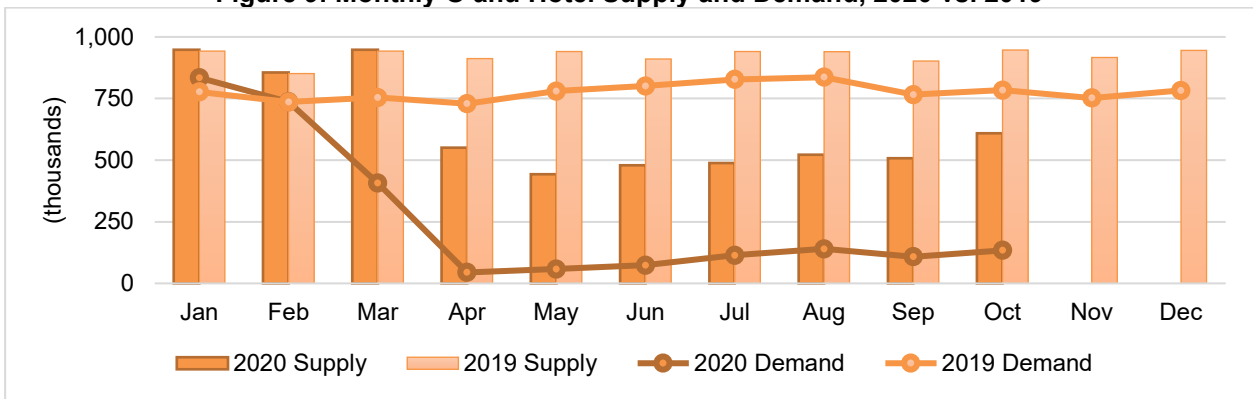
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**Figure 8: Monthly O'ahu Hotel Performance, 2020 vs. 2019**



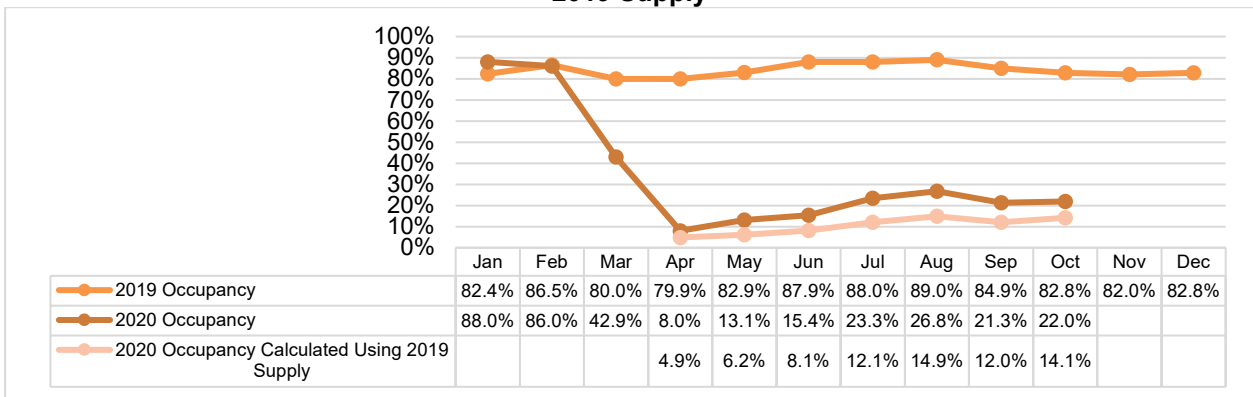
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**Figure 9: Monthly O'ahu Hotel Supply and Demand, 2020 vs. 2019**



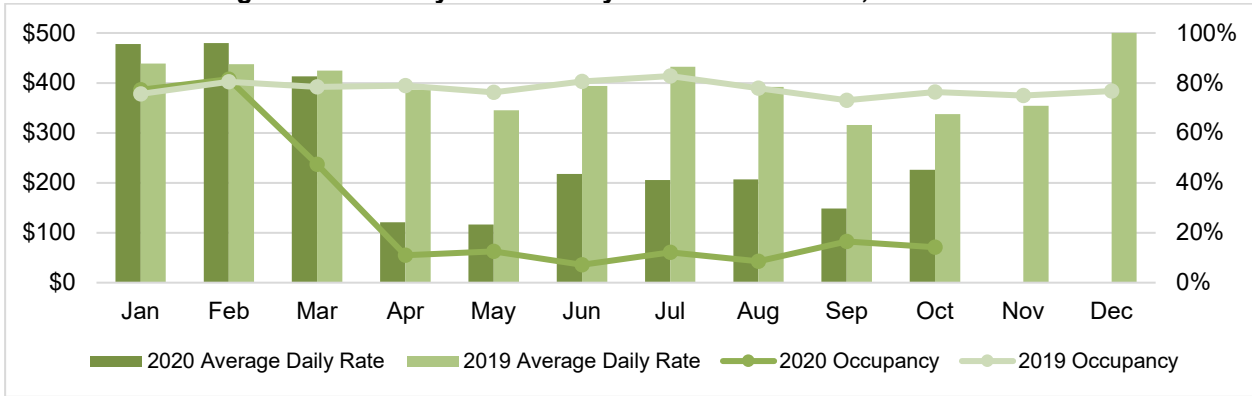
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**Figure 10: Monthly O'ahu Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



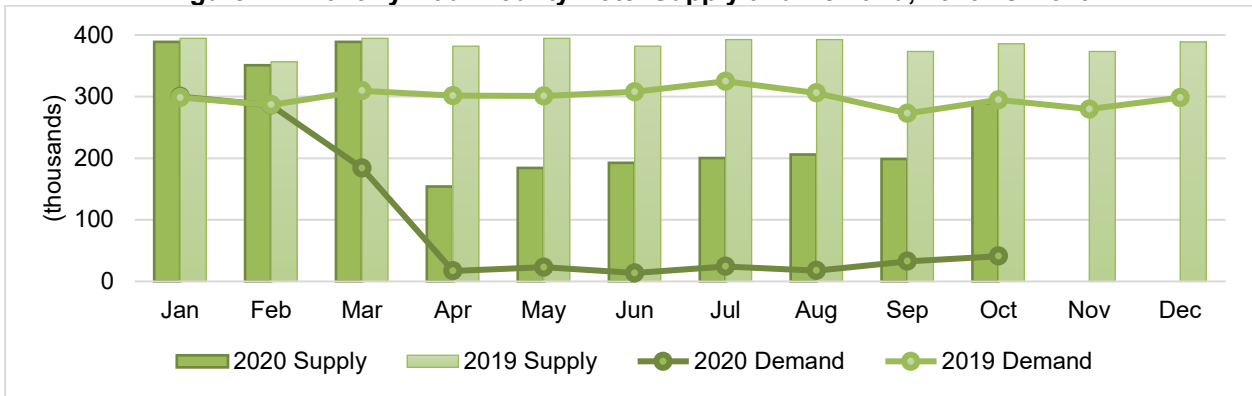
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**Figure 11: Monthly Maui County Hotel Performance, 2020 vs. 2019**



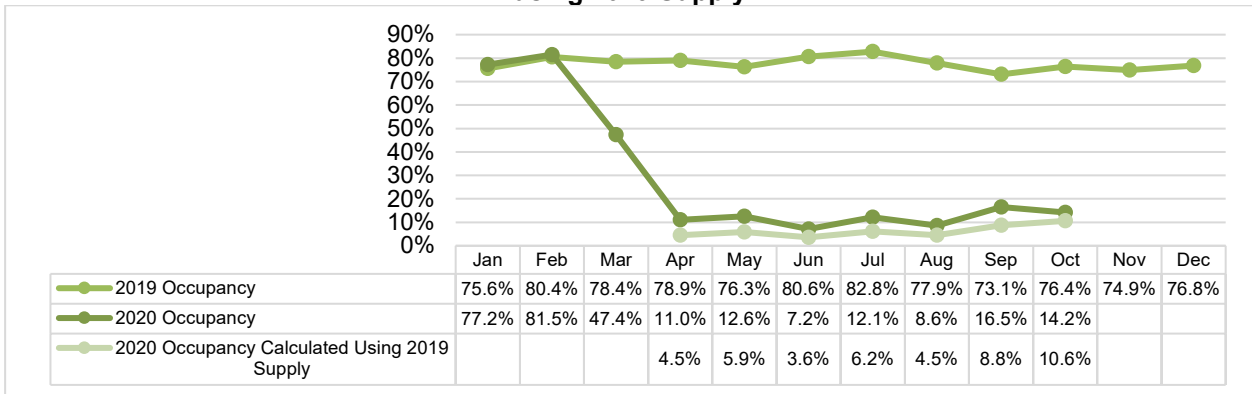
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**Figure 12: Monthly Maui County Hotel Supply and Demand, 2020 vs. 2019**



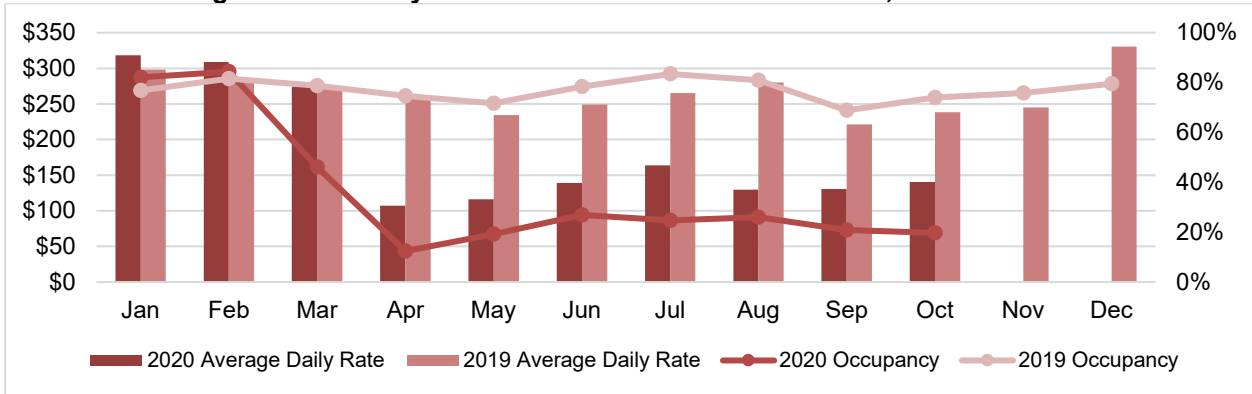
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**Figure 13: Monthly Maui County Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



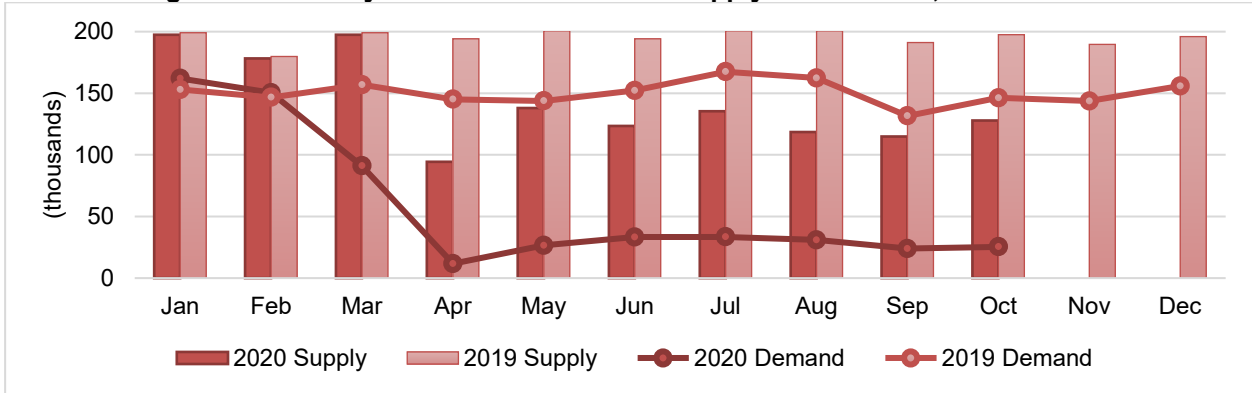
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**Figure 14: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019**



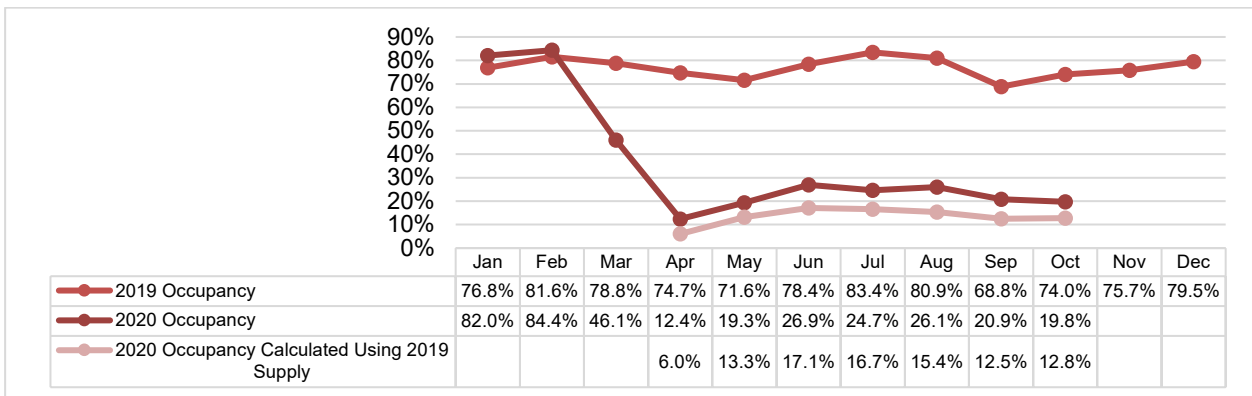
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**Figure 15: Monthly Island of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



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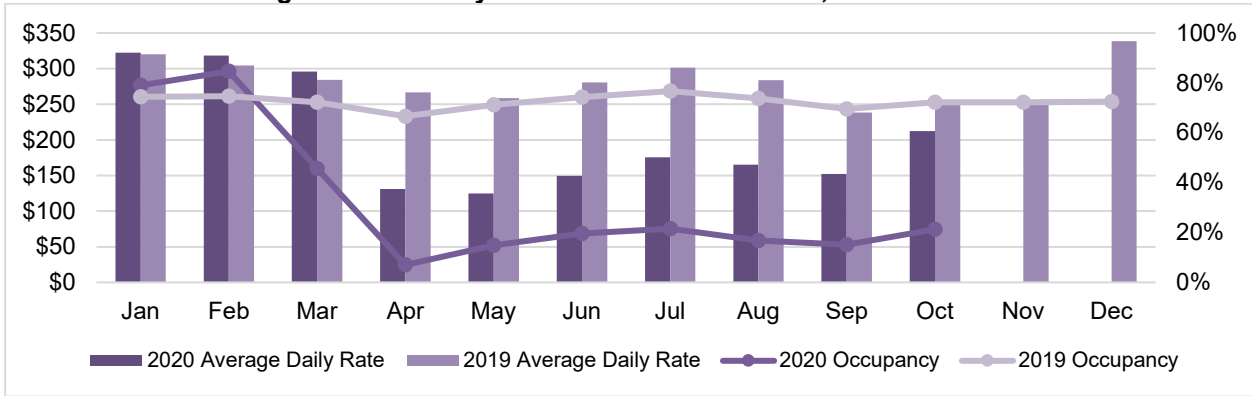
**Figure 16: Monthly Island of Hawai'i Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



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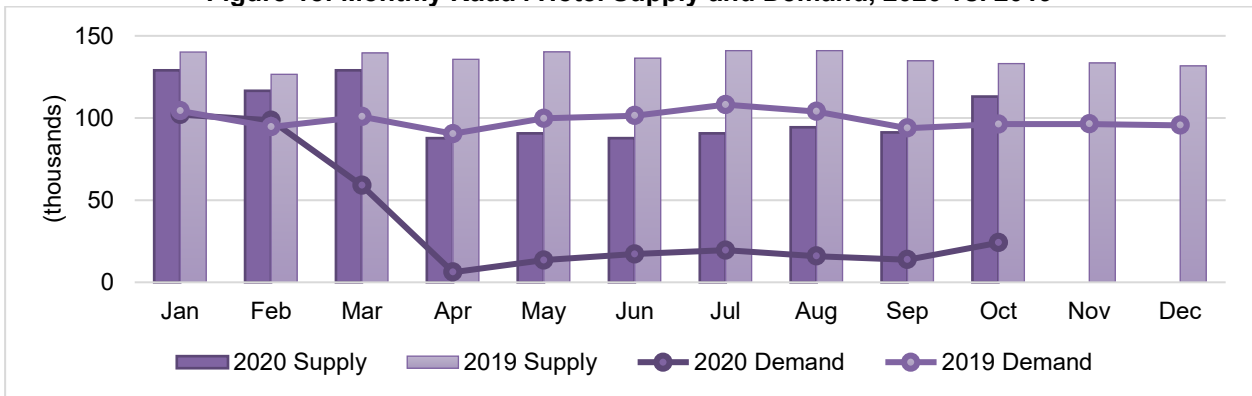


**Figure 17: Monthly Kaua'i Hotel Performance, 2020 vs. 2019**



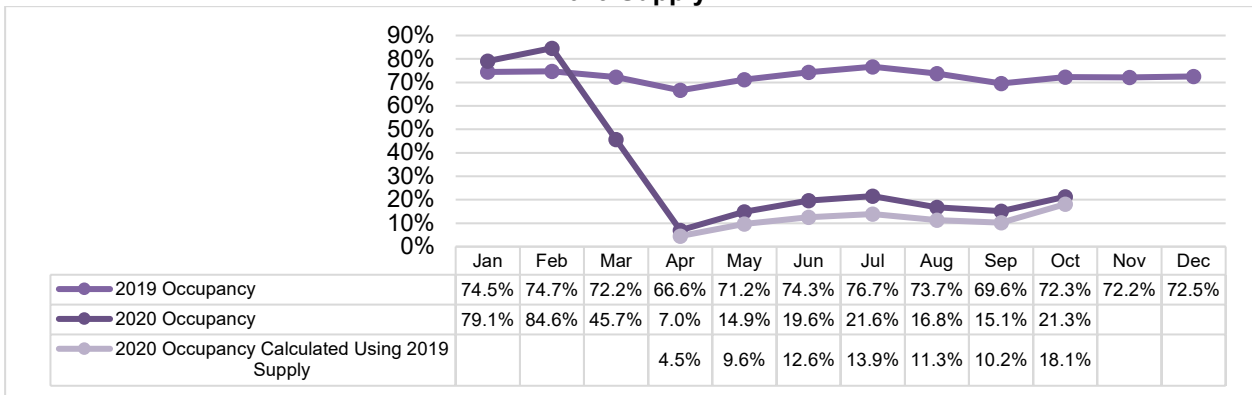
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**Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2020 vs. 2019**



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**Figure 19: Monthly Kauai Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



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