



February 2021 Hawaii Hotel Performance Report

In February 2021, Hawaii hotels statewide reported continued declines in revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to February 2020 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 \$79 (-69.9%), ADR fell to \$259 (-16.5%), and occupancy declined to 30.5 percent (-54.0 percentage points) (Figure 1) in February 2021. 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. For February, the survey included 148 properties representing 43,266 rooms, or 81.4 percent of all lodging properties and 86.0 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. Vacation rental and timeshare properties were not included in this survey.

During February, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. All trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawaii. Kauai County continued to temporarily suspend its participation in the state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kauai to quarantine upon arrival except for those participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawaii, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in February.

Hawaii hotel room revenues statewide fell to \$111.2 million (-72.1%) in February. Room demand was 429,700 room nights (-66.5%) and room supply was 1.4 million room nights (-7.3%) (Figure 2). Many properties closed or reduced operations starting in April 2020. If occupancy for February 2021 was calculated based on the pre-pandemic room supply from February 2019, occupancy would be 28.4 percent for the month (Figure 5).

All classes of Hawaii hotel properties statewide reported RevPAR losses in February compared to a year ago. Luxury Class properties earned RevPAR of \$188 (-61.0%), with higher ADR at \$729 (+19.5%) counterbalanced by an occupancy of 25.8 percent (-53.4 percentage points). Midscale & Economy Class properties earned RevPAR of \$65 (-64.3%) with ADR at \$171 (-18.3%) and occupancy of 37.9 percent (-48.8 percentage points).

All of Hawaii's four island counties reported lower RevPAR, ADR and occupancy compared to a year ago. Maui County hotels led the counties in February RevPAR of \$141 (-63.8%), with ADR at \$446 (-7.3%) and occupancy of 31.7 percent (-49.5 percentage points). Maui County's February supply was 354,800 room nights (-0.3%). Maui's luxury resort region of Wailea had RevPAR of \$239 (-61.9%), with ADR at \$758 (+7.5%) and occupancy of 31.5 percent (-57.5 percentage points). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$104 (-67.8%), ADR at \$364 (-9.1%) and occupancy of 28.7 percent (-52.3 percentage points).

O'ahu hotels earned RevPAR of \$50 (-76.3%) in February, with ADR at \$169 (-30.5%) and occupancy of 29.3 percent (-56.7 percentage points). O'ahu's February supply was 775,600 room nights (-9.5%). Waikīkī hotels earned \$45 (-78.0%) in RevPAR with ADR at \$164 (-31.4%) and occupancy of 27.6 percent (-58.4 percentage points).

Hotels on the island of Hawai'i reported RevPAR of \$98 (-62.0%), with ADR at \$276 (-9.0%) and occupancy of 35.3 percent (-49.3 percentage points). The island of Hawai'i's February supply was 186,800 room nights (-0.2%). Kohala Coast hotels earned RevPAR of \$154 (-59.5%), ADR at \$445 (-2.5%) and occupancy of 34.6 percent (-48.6 percentage points).

Kaua'i hotels earned RevPAR of \$48 (-82.0%), with ADR at \$181 (-42.9%) and occupancy of 26.4 percent (-57.4 percentage points). Kaua'i's February supply was 90,800 room nights, 22.9 percent lower than last February.

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 February, the survey included 148 properties representing 43,266 rooms, or 81.4 percent of all lodging properties¹ and 86.0 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The February survey included 68 properties on O'ahu representing 25,790 rooms (93.1% of operating properties); 45 properties in the County of Maui, representing 10,094 rooms (79.6% of operating properties); 20 properties on the island of Hawai'i, representing 4,958 rooms (74.3% of operating properties); and 15 properties on Kaua'i, representing 2,424 rooms (74.7% of operating properties).

¹ Based on 2019 census rooms.

Figure 1: Hawai'i Hotel Performance February 2021

	Occupancy % Percentage Pt. Change			Average Daily Rate %			RevPAR %		
	2021	2020	Change	2021	2020	Change	2021	2020	Change
State of Hawai'i	30.5%	84.5%	-54.0%	\$258.77	\$310.01	-16.5%	\$78.97	\$262.04	-69.9%
Luxury Class	25.8%	79.2%	-53.4%	\$728.70	\$609.84	19.5%	\$188.34	\$482.99	-61.0%
Upper Upscale Class	25.8%	85.9%	-60.1%	\$251.81	\$299.28	-15.9%	\$65.07	\$257.07	-74.7%
Upscale Class	35.2%	84.6%	-49.4%	\$183.01	\$239.95	-23.7%	\$64.44	\$203.00	-68.3%
Upper Midscale Class	36.4%	85.3%	-48.9%	\$135.01	\$179.66	-24.9%	\$49.18	\$153.24	-67.9%
Midscale & Economy Class	37.9%	86.6%	-48.8%	\$171.24	\$209.53	-18.3%	\$64.85	\$181.52	-64.3%
O'ahu	29.3%	86.0%	-56.7%	\$169.26	\$243.49	-30.5%	\$49.61	\$209.39	-76.3%
Waikiki	27.6%	86.0%	-58.4%	\$164.07	\$239.30	-31.4%	\$45.20	\$205.73	-78.0%
Other O'ahu	42.1%	86.2%	-44.1%	\$193.94	\$268.07	-27.7%	\$81.56	\$230.97	-64.7%
O'ahu Luxury	18.8%	76.5%	-57.7%	\$470.83	\$496.27	-5.1%	\$88.63	\$379.55	-76.6%
O'ahu Upper Upscale	21.1%	85.3%	-64.2%	\$202.37	\$262.08	-22.8%	\$42.79	\$223.64	-80.9%
O'ahu Upscale	39.9%	91.2%	-51.3%	\$158.21	\$207.56	-23.8%	\$63.05	\$189.27	-66.7%
O'ahu Upper Midscale	35.2%	85.1%	-49.9%	\$123.42	\$167.36	-26.3%	\$43.40	\$142.37	-69.5%
O'ahu Midscale & Economy	44.6%	90.9%	-46.4%	\$96.77	\$142.28	-32.0%	\$43.14	\$129.38	-66.7%
Maui County	31.7%	81.2%	-49.5%	\$446.23	\$481.12	-7.3%	\$141.41	\$390.61	-63.8%
Wailea	31.5%	89.0%	-57.5%	\$757.97	\$705.25	7.5%	\$238.98	\$627.98	-61.9%
Lahaina/Kā'anapali/Kapalua	28.7%	81.0%	-52.3%	\$364.37	\$401.01	-9.1%	\$104.45	\$324.63	-67.8%
Other Maui County	35.3%	81.5%	-46.2%	\$525.19	\$576.37	-8.9%	\$185.29	\$469.55	-60.5%
Maui County Luxury	29.1%	80.5%	-51.3%	\$822.72	\$738.53	11.4%	\$239.48	\$594.20	-59.7%
Maui County Upper Upscale & Upscale	32.5%	82.5%	-50.0%	\$318.08	\$389.30	-18.3%	\$103.24	\$321.01	-67.8%
Island of Hawai'i	35.3%	84.6%	-49.3%	\$276.44	\$303.64	-9.0%	\$97.62	\$256.88	-62.0%
Kohala Coast	34.6%	83.2%	-48.6%	\$445.19	\$456.48	-2.5%	\$154.00	\$379.90	-59.5%
Kaua'i	26.4%	83.8%	-57.4%	\$180.80	\$316.76	-42.9%	\$47.74	\$265.45	-82.0%

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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 February 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	1,408.0	1,518.2	-7.3%	429.7	1,283.3	-66.5%	111.2	397.8	-72.1%
O'ahu	775.6	857.3	-9.5%	227.3	737.2	-69.2%	38.5	179.5	-78.6%
Waikiki	681.7	732.7	-7.0%	187.8	629.9	-70.2%	30.8	150.7	-79.6%
Maui County	354.8	355.9	-0.3%	112.5	289.0	-61.1%	50.2	139.0	-63.9%
Wailea	61.4	61.4	0.0%	19.4	54.7	-64.6%	14.7	38.6	-61.9%
Lahaina/Kā'anapali/ Kapalua	192.8	194.1	-0.7%	55.3	157.1	-64.8%	20.1	63.0	-68.0%
Island of Hawai'i	186.8	187.2	-0.2%	66.0	158.4	-58.4%	18.2	48.1	-62.1%
Kohala Coast	78.1	78.6	-0.6%	27.0	65.4	-58.7%	12.0	29.9	-59.7%
Kaua'i	90.8	117.8	-22.9%	24.0	98.7	-75.7%	4.3	31.3	-86.1%

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Figure 3: Hawai'i Hotel Performance Year-to-Date February 2021

	Occupancy % Percentage Pt. Change			Average Daily Rate %			RevPAR %		
	2021	2020	Change	2021	2020	Change	2021	2020	Change
State of Hawai'i	26.7%	84.2%	-57.5%	\$255.39	\$312.34	-18.2%	\$68.28	\$263.02	-74.0%
Luxury Class	21.3%	77.8%	-56.5%	\$753.55	\$627.51	20.1%	\$160.23	\$488.19	-67.2%
Upper Upscale Class	21.9%	85.3%	-63.4%	\$247.81	\$301.62	-17.8%	\$54.21	\$257.32	-78.9%
Upscale Class	31.4%	84.7%	-53.2%	\$183.27	\$238.28	-23.1%	\$57.56	\$201.70	-71.5%
Upper Midscale Class	34.1%	86.6%	-52.5%	\$134.86	\$180.82	-25.4%	\$46.01	\$156.60	-70.6%
Midscale & Economy Class	34.5%	86.4%	-51.9%	\$169.08	\$209.35	-19.2%	\$58.27	\$180.85	-67.8%
O'ahu	26.3%	87.0%	-60.7%	\$168.81	\$249.00	-32.2%	\$44.46	\$216.61	-79.5%
Waikiki	24.6%	86.8%	-62.2%	\$163.90	\$244.51	-33.0%	\$40.32	\$212.33	-81.0%
Other O'ahu	38.8%	87.9%	-49.1%	\$191.19	\$275.04	-30.5%	\$74.20	\$241.80	-69.3%
O'ahu Luxury	15.7%	78.2%	-62.6%	\$483.28	\$523.51	-7.7%	\$75.82	\$409.61	-81.5%
O'ahu Upper Upscale	18.3%	86.1%	-67.8%	\$201.70	\$266.67	-24.4%	\$36.81	\$229.59	-84.0%
O'ahu Upscale	36.2%	92.0%	-55.8%	\$160.22	\$209.01	-23.3%	\$57.97	\$192.35	-69.9%
O'ahu Upper Midscale	33.1%	86.6%	-53.5%	\$123.88	\$169.80	-27.0%	\$40.98	\$147.04	-72.1%
O'ahu Midscale & Economy	41.5%	91.5%	-50.0%	\$98.78	\$145.00	-31.9%	\$41.02	\$132.68	-69.1%
Maui County	26.6%	79.0%	-52.4%	\$448.09	\$479.63	-6.6%	\$119.03	\$378.85	-68.6%
Wailea	24.9%	87.0%	-62.1%	\$777.54	\$711.45	9.3%	\$193.64	\$619.30	-68.7%
Lahaina/Kā'anapali/Kapalua	23.5%	78.5%	-55.1%	\$365.72	\$398.77	-8.3%	\$85.82	\$313.13	-72.6%
Other Maui County	30.2%	79.5%	-49.3%	\$523.97	\$575.15	-8.9%	\$158.44	\$457.49	-65.4%
Maui County Luxury	24.0%	77.6%	-53.6%	\$854.83	\$753.85	13.4%	\$205.24	\$585.22	-64.9%
Maui County Upper Upscale & Upscale	27.0%	80.1%	-53.1%	\$313.24	\$382.55	-18.1%	\$84.73	\$306.61	-72.4%
Island of Hawai'i	30.9%	83.4%	-52.5%	\$272.97	\$308.30	-11.5%	\$84.34	\$257.07	-67.2%
Kohala Coast	29.3%	81.6%	-52.3%	\$445.00	\$468.32	-5.0%	\$130.50	\$382.29	-65.9%
Kaua'i	22.2%	81.0%	-58.8%	\$175.38	\$321.88	-45.5%	\$38.95	\$260.69	-85.1%

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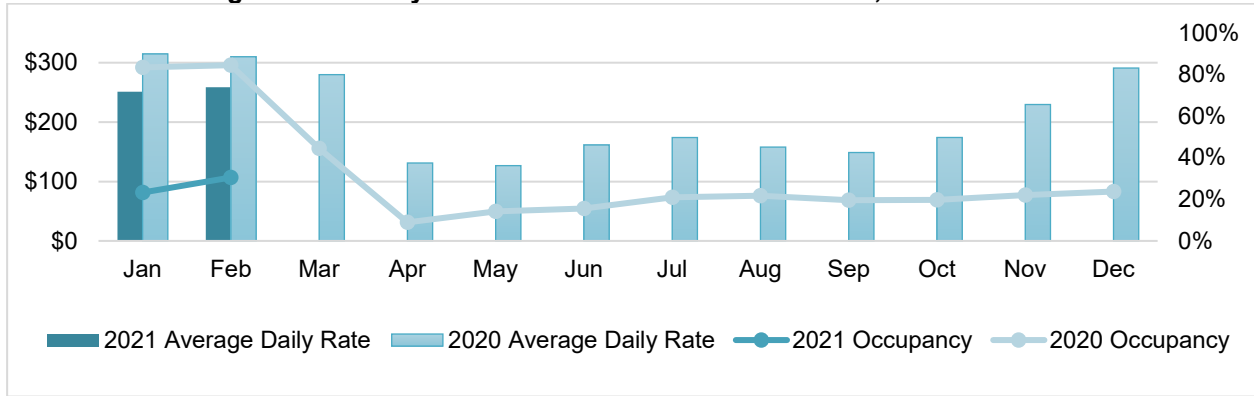
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date February 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	2,953.1	3,199.1	-7.7%	789.5	2,693.9	-70.7%	201.6	841.4	-76.0%
O'ahu	1,620.5	1,806.4	-10.3%	426.8	1,571.5	-72.8%	72.0	391.3	-81.6%
Waikiki	1,422.7	1,543.9	-7.9%	350.0	1,340.7	-73.9%	57.4	327.8	-82.5%
Maui County	747.7	750.0	-0.3%	198.6	592.4	-66.5%	89.0	284.1	-68.7%
Wailea	129.4	129.4	0.0%	32.2	112.7	-71.4%	25.1	80.2	-68.7%
Lahaina/Kā'anapali/ Kapalua	406.3	409.0	-0.7%	95.4	321.2	-70.3%	34.9	128.1	-72.8%
Island of Hawai'i	393.5	394.4	-0.2%	121.6	328.9	-63.0%	33.2	101.4	-67.3%
Kohala Coast	164.6	165.7	-0.6%	48.3	135.2	-64.3%	21.5	63.3	-66.1%
Kaua'i	191.4	248.3	-22.9%	42.5	201.1	-78.9%	7.5	64.7	-88.5%

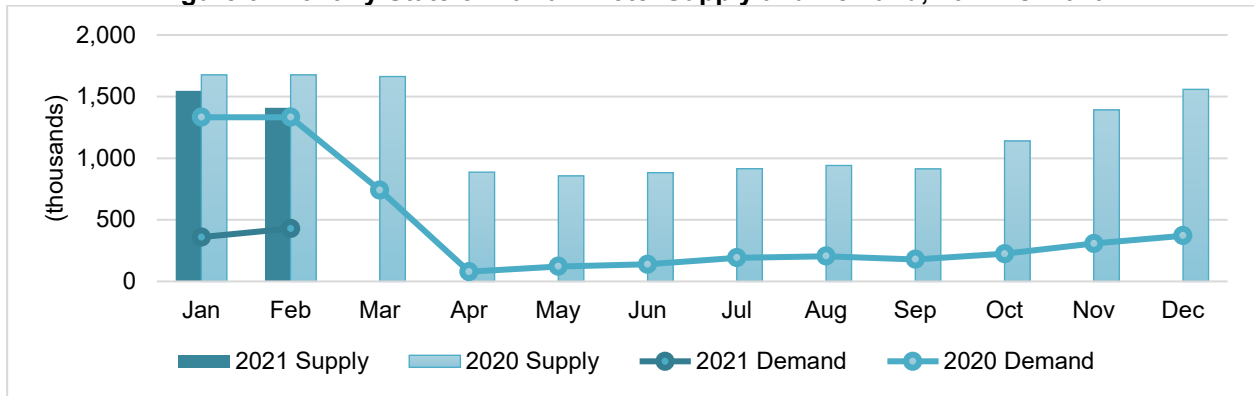
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2021 vs. 2020



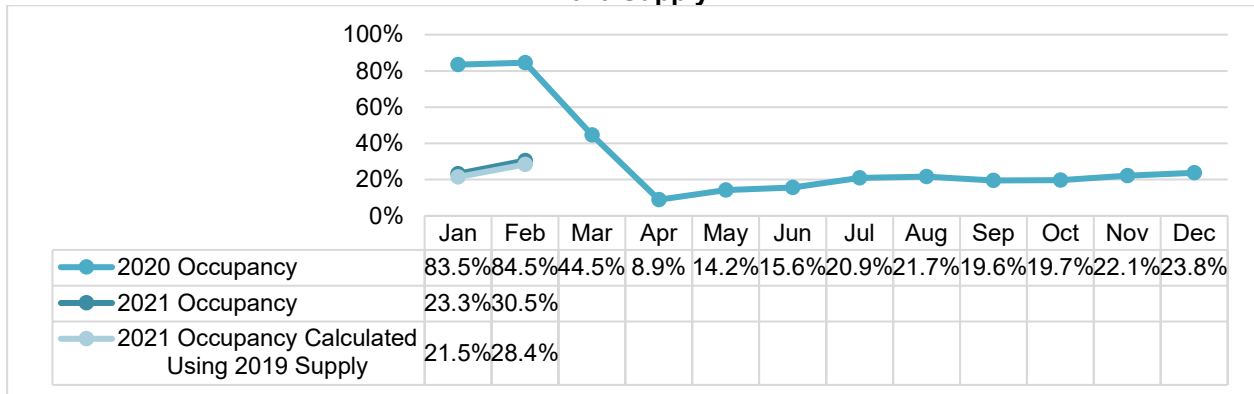
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2021 vs. 2020



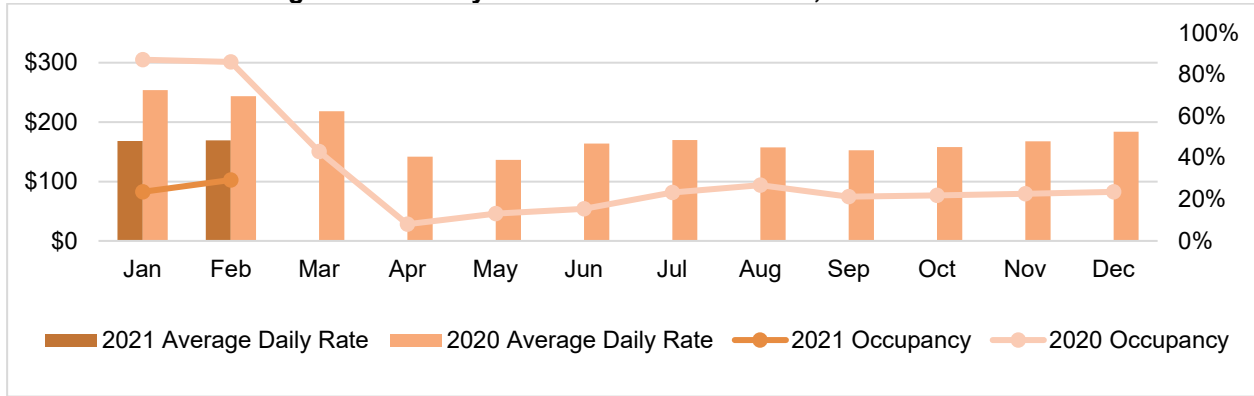
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Figure 7: Monthly State of Hawai'i Hotel Occupancy, 2021 vs. 2020 and 2020 Calculated with 2019 Supply



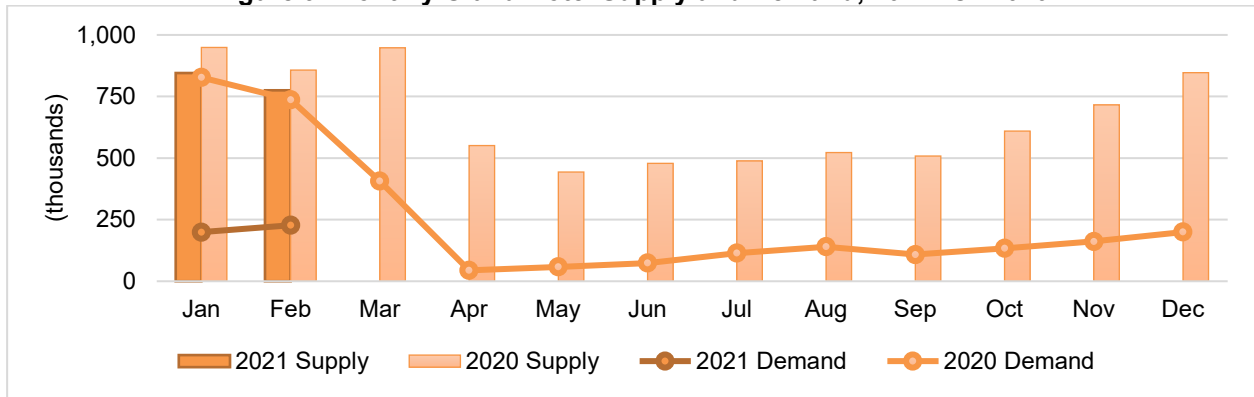
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Figure 8: Monthly O'ahu Hotel Performance, 2021 vs. 2020



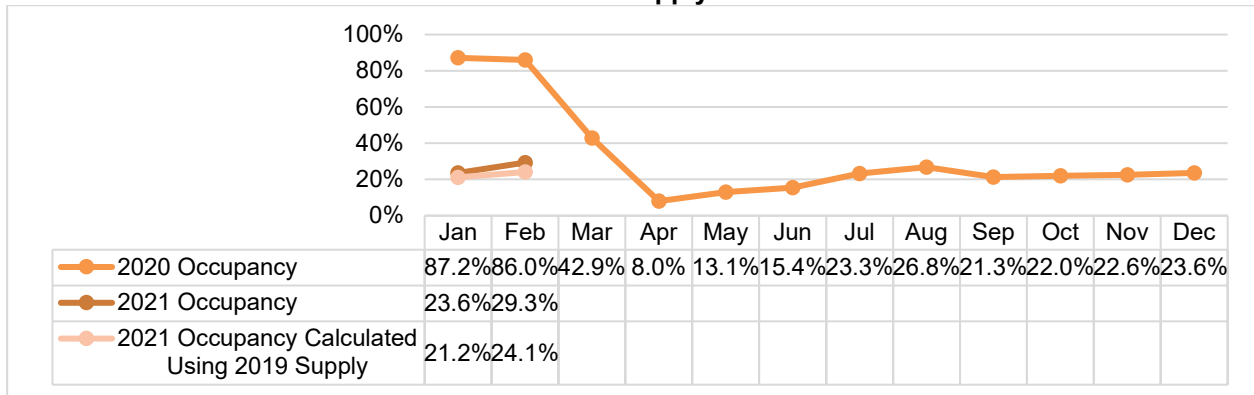
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Figure 9: Monthly O'ahu Hotel Supply and Demand, 2021 vs. 2020



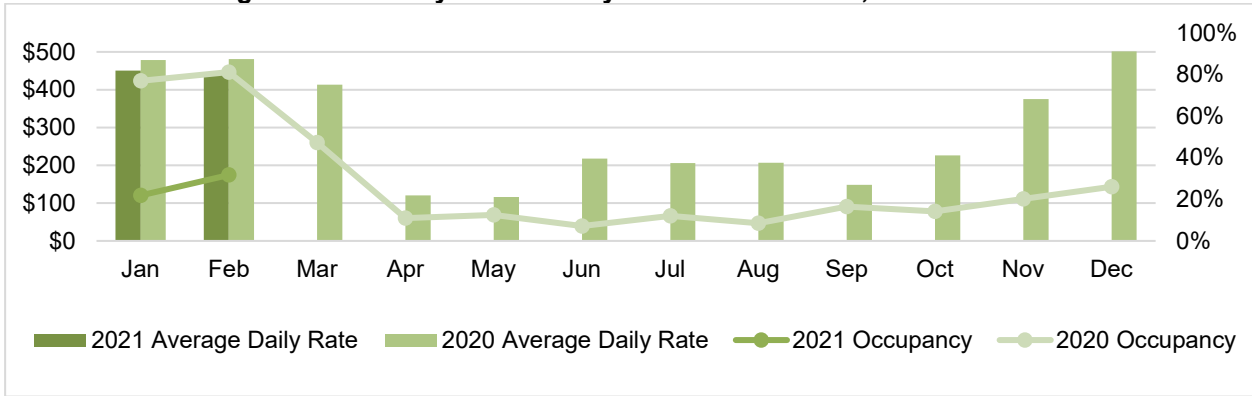
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Figure 10: Monthly O'ahu Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



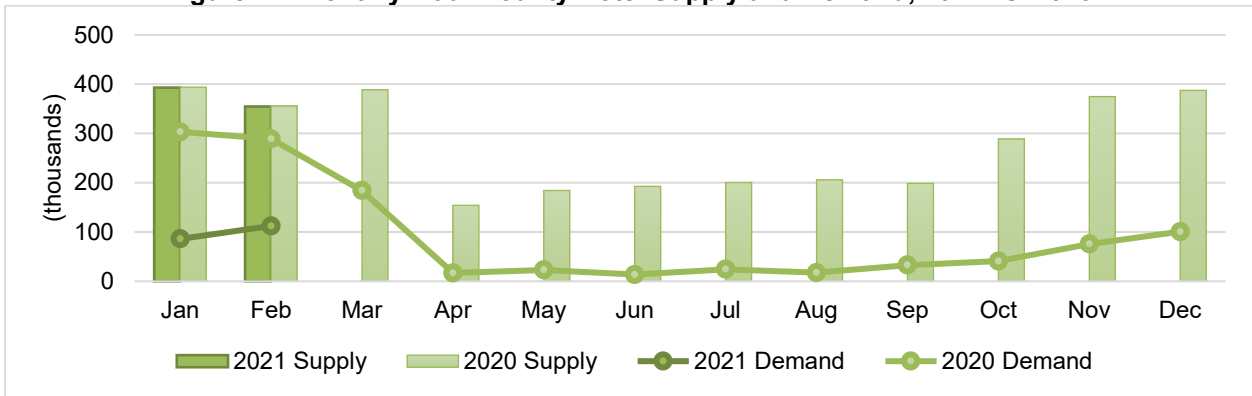
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Figure 11: Monthly Maui County Hotel Performance, 2021 vs. 2020



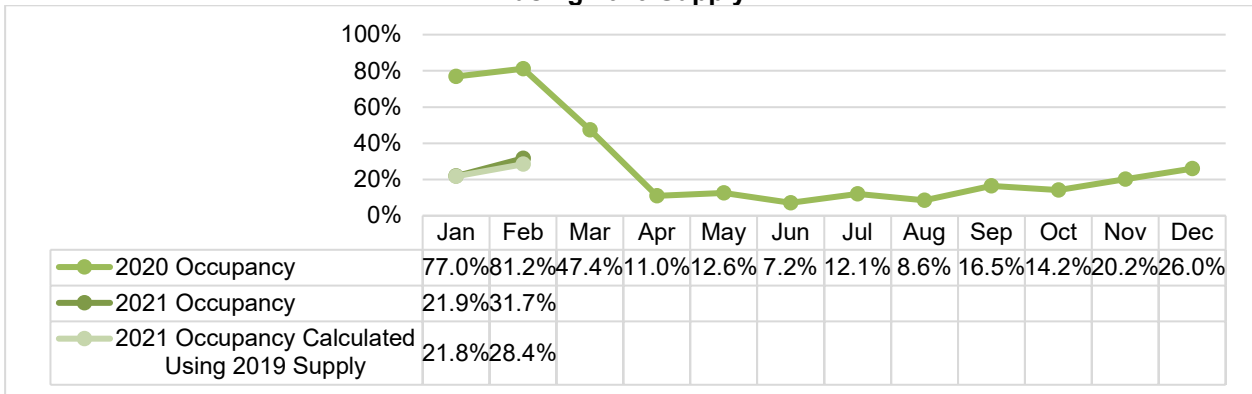
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Figure 12: Monthly Maui County Hotel Supply and Demand, 2021 vs. 2020



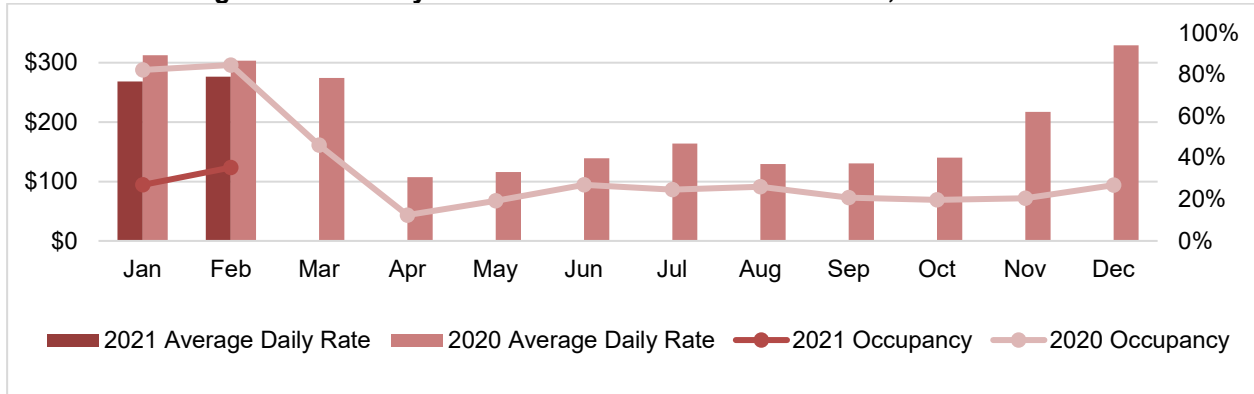
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Figure 13: Monthly Maui County Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



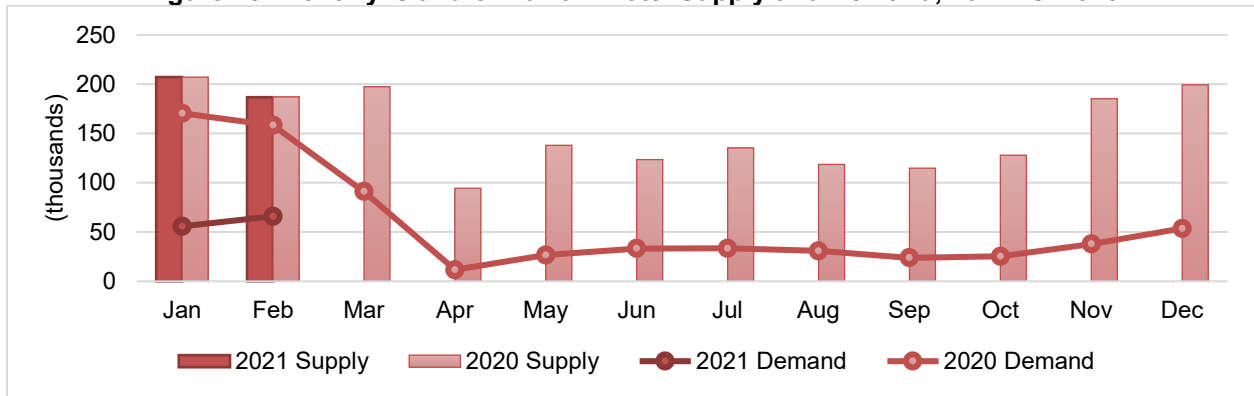
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Figure 14: Monthly Island of Hawai'i Hotel Performance, 2021 vs. 2020



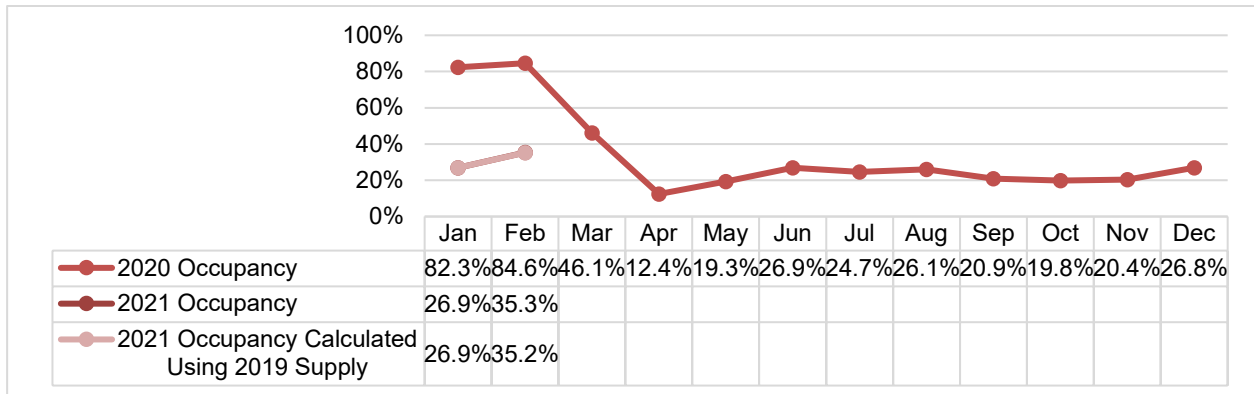
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Figure 15: Monthly Island of Hawai'i Hotel Supply and Demand, 2021 vs. 2020



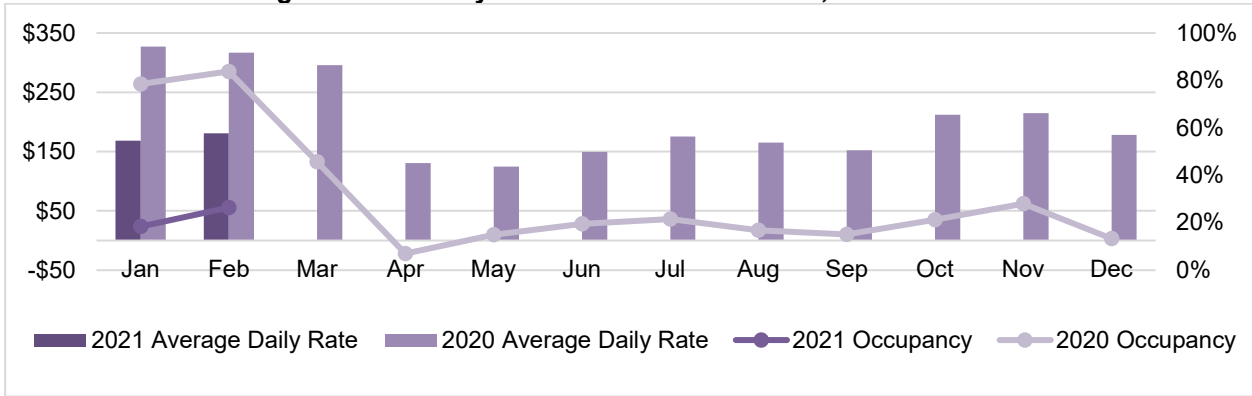
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Figure 16: Monthly Island of Hawai'i Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



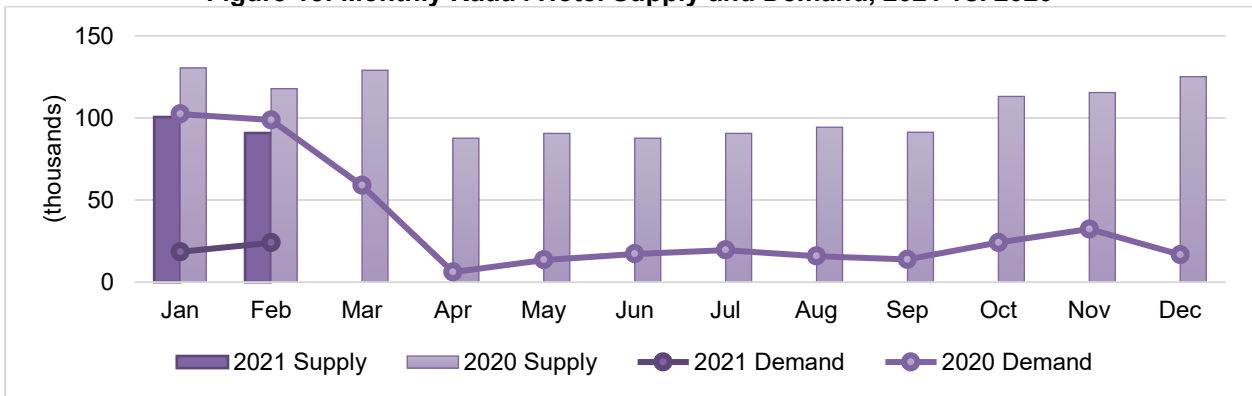
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Figure 17: Monthly Kaua'i Hotel Performance, 2021 vs. 2020



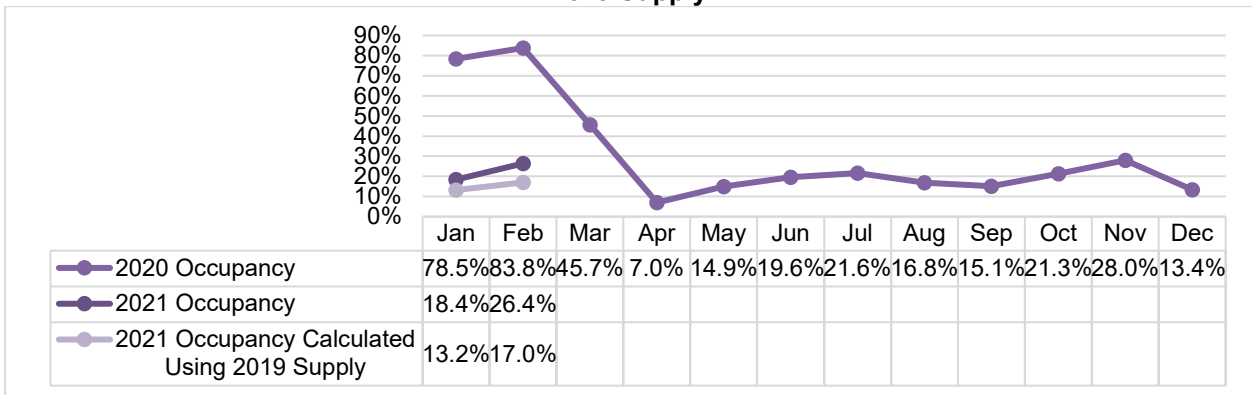
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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2021 vs. 2020



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Figure 19: Monthly Kauai Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



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