



## November 2020 Hawai'i Hotel Performance Report

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

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority's (HTA) Research Division, statewide RevPAR decreased to \$51 (-75.4%), ADR fell to \$230 (-12.0%), and occupancy declined to 22.1 percent (-57.0 percentage points) (Figure 1) in November. 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.

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. However, a new policy went into effect on November 24 requiring all trans-Pacific travelers participating in the pre-travel testing program to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrives in Hawai'i. The counties of Kaua'i, Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in November. In addition, Lāna'i residents and visitors were under a stay-at-home order from October 27 to November 11.

Hawai'i hotel room revenues statewide fell to \$70.6 million (-78.8%) in November. Room demand was 307,600 room nights, or 75.9 percent lower than the same period a year ago. Room supply was 1.4 million room nights (-13.8%) (Figure 2). Many properties closed or reduced operations starting in April. If occupancy for November 2020 was calculated based on the room supply from November 2019, occupancy would be 19.1 percent for the month (Figure 7).

All classes of Hawai'i hotel properties statewide reported RevPAR losses in November compared to a year ago. Luxury Class properties earned RevPAR of \$95 (-74.6%), with ADR at \$543 (+5.9%) and occupancy of 17.6 percent (-55.8 percentage points). Midscale & Economy Class properties earned RevPAR of \$47 (-64.4%) and occupancy of 29.0 percent (-52.6 percentage points).

All of Hawai'i's four island counties reported lower RevPAR, ADR and occupancy compared to a year ago. Maui County hotels led the counties in November RevPAR of \$76 (-72.1%), with ADR at \$375 (+4.2%) and occupancy of 20.2 percent (-55.0 percentage points). Maui's luxury resort region of Wailea had RevPAR of \$130 (-72.0%), with ADR at \$523 (-5.3%) and occupancy of 24.9 percent (-59.3 percentage points). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$51 (-76.3%), ADR at \$345 (+15.6%) and occupancy of 14.8 percent (-57.3 percentage points).

O'ahu hotels earned RevPAR of \$38 (-79.8%) in November, with ADR at \$167 (-26.7%) and occupancy of 22.6 percent (-59.4 percentage points). Waikīkī hotels earned \$34 (-82.1%) in RevPAR with ADR at \$162 (-28.5%) and occupancy of 20.8 percent (-62.3 percentage points).

Hotels on the island of Hawai'i reported RevPAR of \$44 (-76.0%), with ADR at \$217 (-11.0%) and occupancy of 20.4 percent (-55.3 percentage points). Kohala Coast hotels earned RevPAR of \$57 (-79.0%), ADR at \$388 (+11.4%) and occupancy of 14.7 percent (-63.1 percentage points).

Kaua'i hotels earned RevPAR of \$60 (-67.5%), with ADR at \$215 (-13.2%) and occupancy of 28.0 percent (-46.8 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 November, the survey included 136 properties representing 38,502 rooms, or 71.8 percent of all lodging properties and 83.0 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 November 2020**

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	22.1%	79.1%	-57.0%	\$229.61	\$260.98	-12.0%	\$50.75	\$206.39	-75.4%
Luxury Class	17.6%	73.3%	-55.8%	\$542.63	\$512.50	5.9%	\$95.31	\$375.89	-74.6%
Upper Upscale Class	19.6%	80.7%	-61.0%	\$229.57	\$256.99	-10.7%	\$45.09	\$207.35	-78.3%
Upscale Class	23.5%	79.3%	-55.8%	\$169.40	\$196.98	-14.0%	\$39.87	\$156.25	-74.5%
Upper Midscale Class	28.2%	78.7%	-50.5%	\$138.22	\$156.61	-11.7%	\$39.01	\$123.27	-68.4%
Midscale & Economy Class	29.0%	81.6%	-52.6%	\$162.05	\$162.05	0.0%	\$47.00	\$132.20	-64.4%
<b>O'ahu</b>	22.6%	82.0%	-59.4%	\$167.49	\$228.49	-26.7%	\$37.86	\$187.39	-79.8%
Waikiki	20.8%	83.1%	-62.3%	\$161.75	\$226.38	-28.5%	\$33.60	\$188.02	-82.1%
Other O'ahu	33.8%	75.9%	-42.1%	\$189.08	\$242.01	-21.9%	\$63.87	\$183.70	-65.2%
O'ahu Luxury	10.2%	73.3%	-63.1%	\$485.17	\$459.76	5.5%	\$49.59	\$336.94	-85.3%
O'ahu Upper Upscale	17.8%	83.3%	-65.5%	\$196.15	\$246.15	-20.3%	\$34.96	\$205.13	-83.0%
O'ahu Upscale	27.5%	85.1%	-57.6%	\$156.07	\$193.92	-19.5%	\$42.94	\$165.10	-74.0%
O'ahu Upper Midscale	27.0%	78.0%	-51.0%	\$130.25	\$151.16	-13.8%	\$35.22	\$117.96	-70.1%
O'ahu Midscale & Economy	35.6%	86.1%	-50.4%	\$95.48	\$126.42	-24.5%	\$34.01	\$108.79	-68.7%
<b>Maui County</b>	20.2%	75.1%	-55.0%	\$374.97	\$359.97	4.2%	\$75.58	\$270.46	-72.1%
Wailea	24.9%	84.3%	-59.3%	\$522.82	\$551.96	-5.3%	\$130.40	\$465.12	-72.0%
Lahaina/Kā'anapali/Kapalua	14.8%	72.0%	-57.3%	\$345.16	\$298.56	15.6%	\$50.97	\$215.11	-76.3%
Other Maui County	26.6%	78.9%	-52.3%	\$394.80	\$428.49	-7.9%	\$105.10	\$338.08	-68.9%
Maui County Luxury	20.9%	76.1%	-55.2%	\$622.59	\$576.28	8.0%	\$129.97	\$438.47	-70.4%
Maui County Upper Upscale & Upscale	18.3%	74.4%	-56.0%	\$275.22	\$281.72	-2.3%	\$50.49	\$209.55	-75.9%
<b>Island of Hawai'i</b>	20.4%	75.7%	-55.3%	\$217.37	\$244.19	-11.0%	\$44.45	\$184.85	-76.0%
Kohala Coast	14.7%	77.8%	-63.1%	\$388.26	\$348.51	11.4%	\$56.95	\$271.19	-79.0%
<b>Kaua'i</b>	28.0%	74.8%	-46.8%	\$215.05	\$247.72	-13.2%	\$60.19	\$185.35	-67.5%

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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 November 2020**

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	1,391.6	1,614.5	-13.8%	307.6	1,276.7	-75.9%	70.6	333.2	-78.8%
<b>O'ahu</b>	715.9	916.3	-21.9%	161.8	751.5	-78.5%	27.1	171.7	-84.2%
Waikiki	615.3	782.8	-21.4%	127.8	650.1	-80.3%	20.7	147.2	-86.0%
<b>Maui County</b>	374.9	378.2	-0.9%	75.6	284.2	-73.4%	28.3	102.3	-72.3%
Wailea	65.8	65.8	0.0%	16.4	55.5	-70.4%	8.6	30.6	-72.0%
Lahaina/Kā'anapali/Kapalua	204.5	208.0	-1.7%	30.2	149.9	-79.9%	10.4	44.7	-76.7%
<b>Island of Hawai'i</b>	185.3	191.2	-3.1%	37.9	144.7	-73.8%	8.2	35.3	-76.7%
Kohala Coast	77.0	88.2	-12.8%	11.3	68.6	-83.6%	4.4	23.9	-81.7%
<b>Kaua'i</b>	115.5	128.8	-10.4%	32.3	96.4	-66.5%	6.9	23.9	-70.9%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2020	2019	Percentage Pt. Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	38.7%	80.9%	-42.1%	\$265.60	\$276.63	-4.0%	\$102.91	\$223.75	-54.0%
Luxury Class	41.4%	76.5%	-35.1%	\$593.82	\$542.53	9.5%	\$245.56	\$414.94	-40.8%
Upper Upscale Class	40.4%	82.7%	-42.3%	\$271.86	\$273.79	-0.7%	\$109.91	\$226.45	-51.5%
Upscale Class	32.4%	78.9%	-46.5%	\$208.01	\$207.11	0.4%	\$67.40	\$163.43	-58.8%
Upper Midscale Class	41.5%	83.3%	-41.8%	\$162.36	\$163.42	-0.6%	\$67.41	\$136.21	-50.5%
Midscale & Economy Class	44.5%	82.0%	-37.5%	\$162.88	\$173.59	-6.2%	\$72.55	\$142.43	-49.1%
<b>O'ahu</b>	40.8%	84.2%	-43.4%	\$217.77	\$236.64	-8.0%	\$88.91	\$199.32	-55.4%
Waikiki	39.3%	84.6%	-45.3%	\$216.77	\$232.13	-6.6%	\$85.14	\$196.35	-56.6%
Other O'ahu	49.0%	82.1%	-33.1%	\$221.99	\$264.63	-16.1%	\$108.76	\$217.27	-49.9%
O'ahu Luxury	NA	74.0%	NA	NA	\$485.33	NA	NA	\$358.98	NA
O'ahu Upper Upscale	40.1%	85.5%	-45.4%	\$244.88	\$256.96	-4.7%	\$98.18	\$219.74	-55.3%
O'ahu Upscale	38.8%	85.4%	-46.6%	\$190.13	\$195.42	-2.7%	\$73.81	\$166.94	-55.8%
O'ahu Upper Midscale	41.2%	83.6%	-42.5%	\$155.80	\$157.59	-1.1%	\$64.12	\$131.79	-51.3%
O'ahu Midscale & Economy	52.8%	87.5%	-34.7%	\$126.35	\$132.06	-4.3%	\$66.77	\$115.58	-42.2%
<b>Maui County</b>	34.9%	77.8%	-42.9%	\$405.71	\$388.33	4.5%	\$141.72	\$302.10	-53.1%
Wailea	NA	88.7%	NA	NA	\$594.08	NA	NA	\$527.07	NA
Lahaina/Kā'anapali/Kapalua	30.0%	76.7%	-46.7%	\$365.88	\$327.23	11.8%	\$109.89	\$251.01	-56.2%
Other Maui County	41.1%	79.2%	-38.1%	\$442.41	\$462.73	-4.4%	\$181.85	\$366.29	-50.4%
Maui County Luxury	44.3%	80.5%	-36.1%	\$691.09	\$612.76	12.8%	\$306.24	\$492.99	-37.9%
Maui County Upper Upscale & Upscale	31.8%	77.6%	-45.8%	\$338.27	\$309.10	9.4%	\$107.48	\$239.81	-55.2%
<b>Island of Hawai'i</b>	39.5%	76.8%	-37.3%	\$247.98	\$259.58	-4.5%	\$97.87	\$199.39	-50.9%
Kohala Coast	NA	77.6%	NA	NA	\$367.27	NA	NA	\$284.88	NA
<b>Kaua'i</b>	35.2%	72.8%	-37.7%	\$265.45	\$277.41	-4.3%	\$93.31	\$202.00	-53.8%

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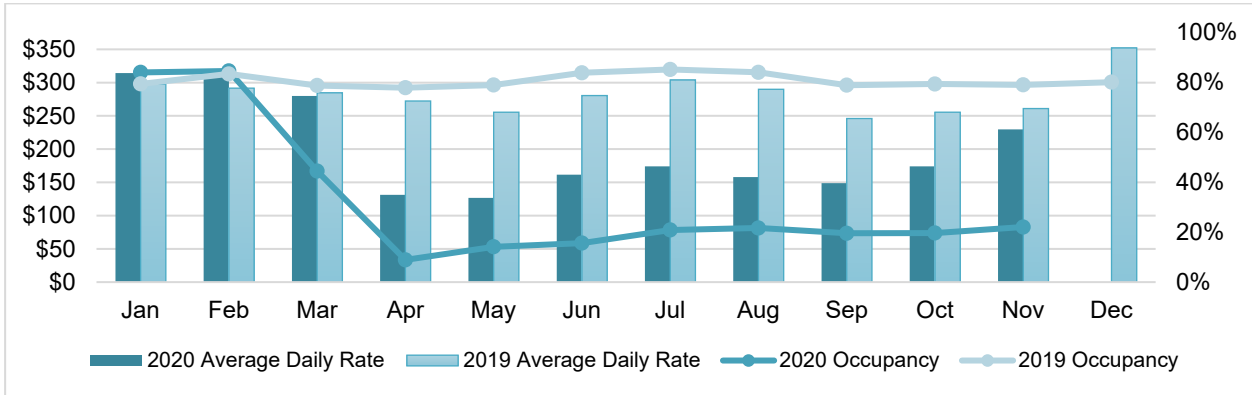
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2020	2019	% Change	2020	2019	% Change	2020	2019	% Change
<b>State of Hawai'i</b>	12,525.8	18,039.5	-30.6%	4,853.2	14,590.7	-66.7%	1,289.0	4,036.3	-68.1%
<b>O'ahu</b>	6,850.1	10,140.7	-32.4%	2,796.9	8,541.6	-67.3%	609.1	2,021.3	-69.9%
Waikiki	5,755.8	8,698.7	-33.8%	2,260.8	7,357.7	-69.3%	490.1	1,708.0	-71.3%
<b>Maui County</b>	2,957.3	4,246.7	-30.4%	1,033.0	3,303.7	-68.7%	419.1	1,282.9	-67.3%
Wailea	NA	732.8	NA	NA	650.1	NA	NA	386.2	NA
Lahaina/Kā'anapali/Kapalua	1,649.4	2,364.7	-30.2%	495.4	1,813.9	-72.7%	181.3	593.6	-69.5%
<b>Island of Hawai'i</b>	1,568.8	2,152.8	-27.1%	619.2	1,653.6	-62.6%	153.5	429.2	-64.2%
Kohala Coast	NA	996.5	NA	NA	773.0	NA	NA	283.9	NA
<b>Kaua'i</b>	1,149.6	1,499.4	-23.3%	404.1	1,091.8	-63.0%	107.3	302.9	-64.6%

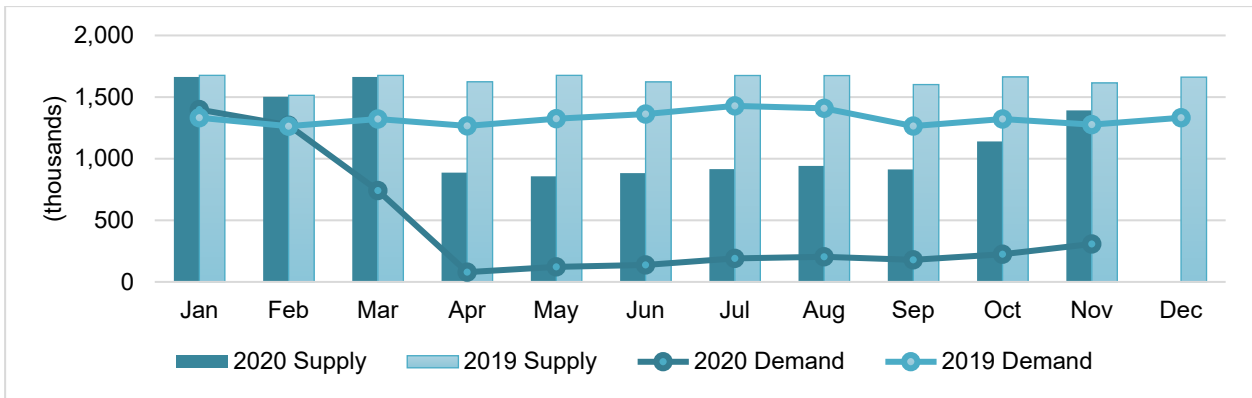
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**Figure 5: Monthly State of Hawai'i Hotel Performance, 2020 vs. 2019**



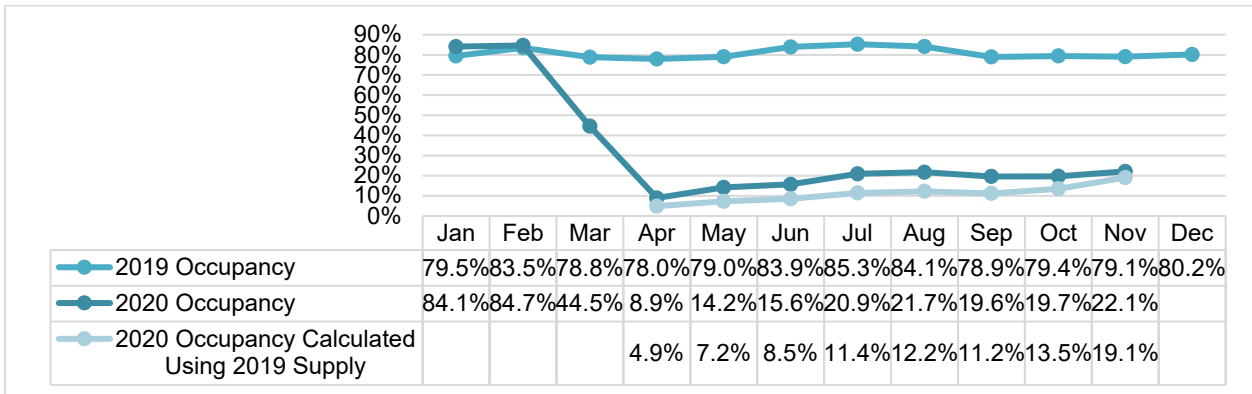
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**Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



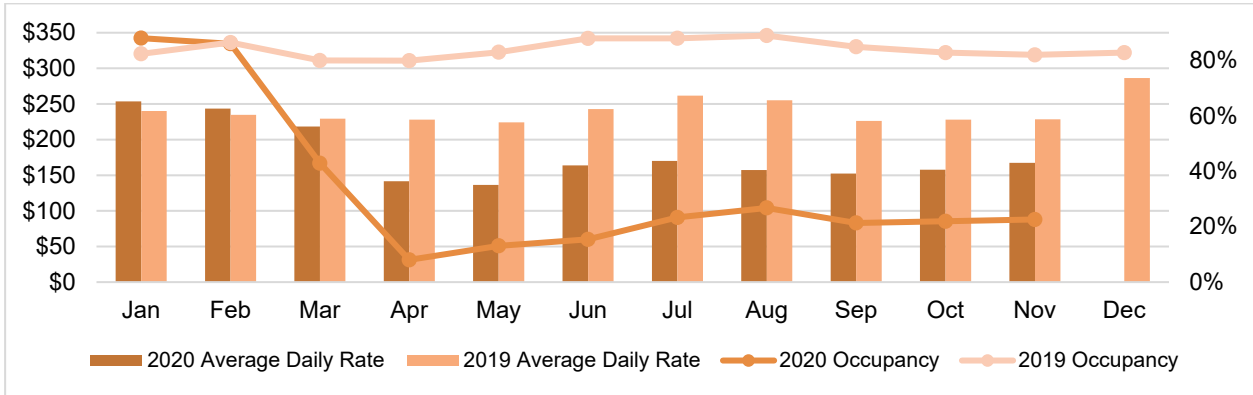
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**Figure 7: Monthly State of Hawai'i Hotel Occupancy, 2020 vs. 2019 and 2020 Calculated with 2019 Supply**



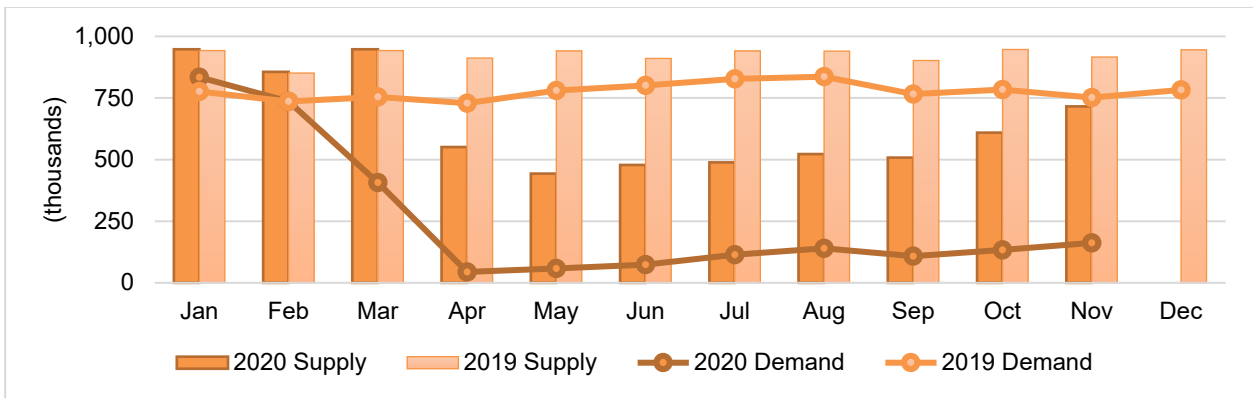
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**Figure 8: Monthly O'ahu Hotel Performance, 2020 vs. 2019**



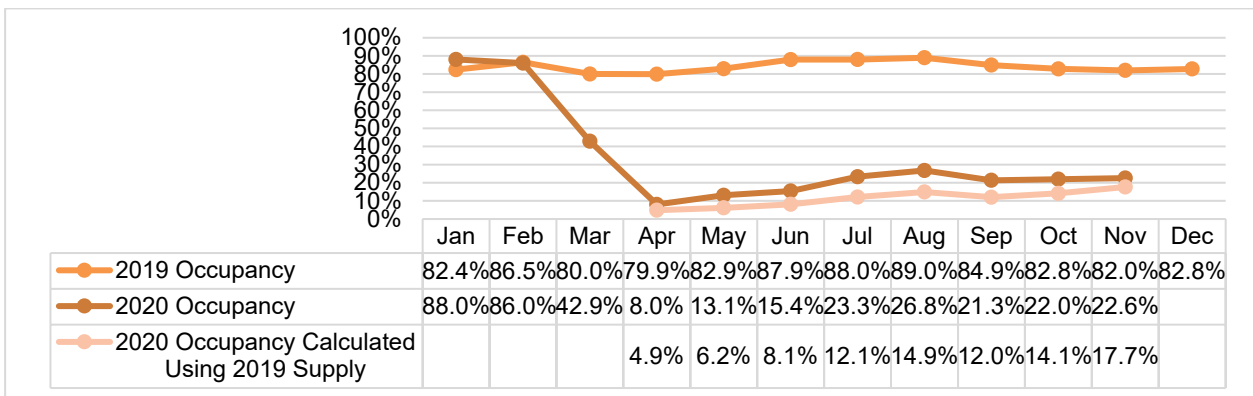
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**Figure 9: Monthly O'ahu Hotel Supply and Demand, 2020 vs. 2019**



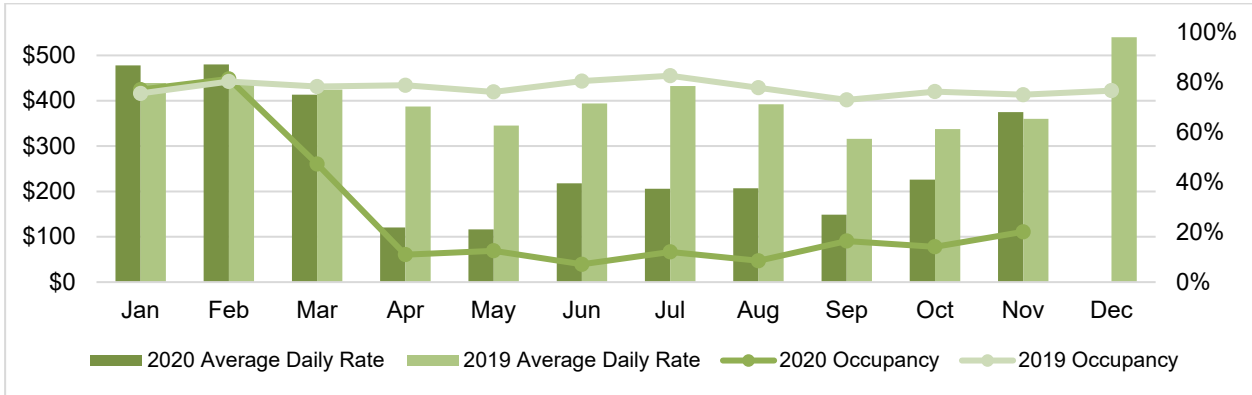
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**Figure 10: Monthly O'ahu Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



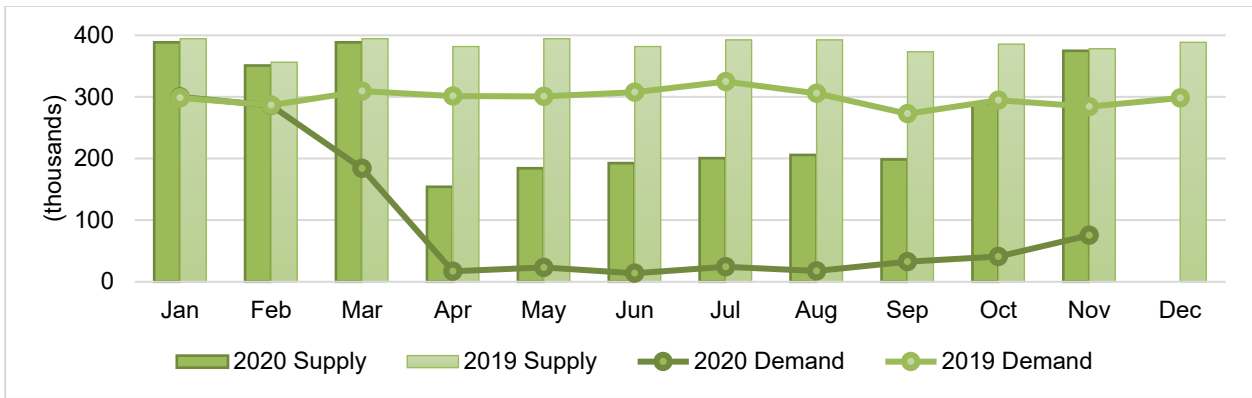
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**Figure 11: Monthly Maui County Hotel Performance, 2020 vs. 2019**



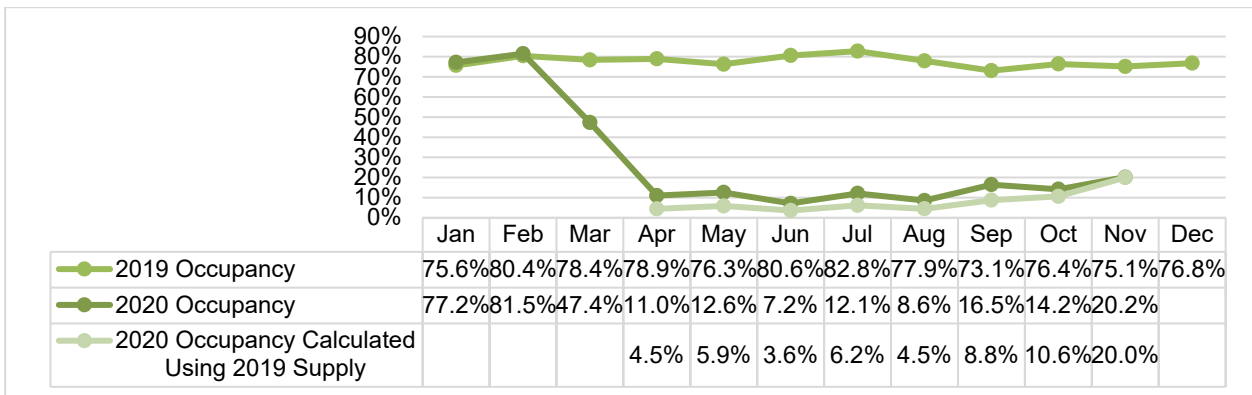
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**Figure 12: Monthly Maui County Hotel Supply and Demand, 2020 vs. 2019**



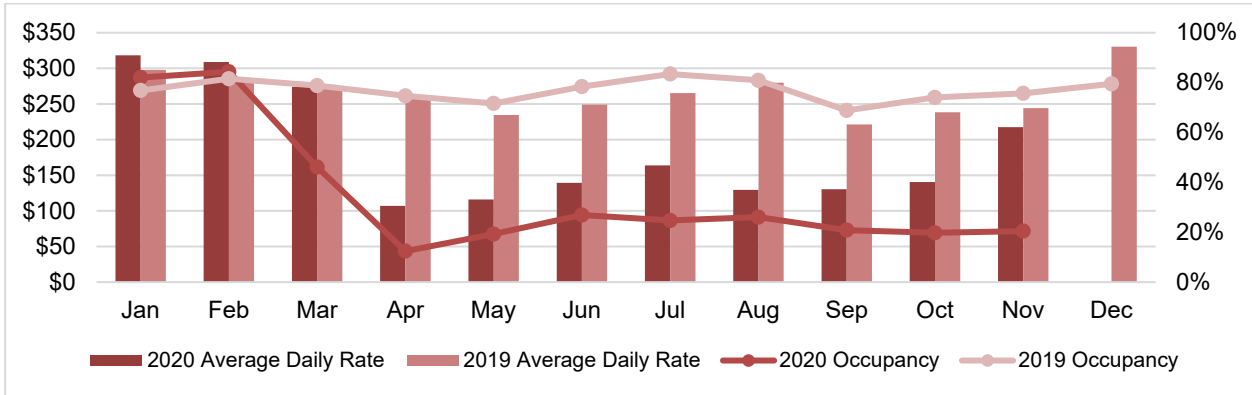
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**Figure 13: Monthly Maui County Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



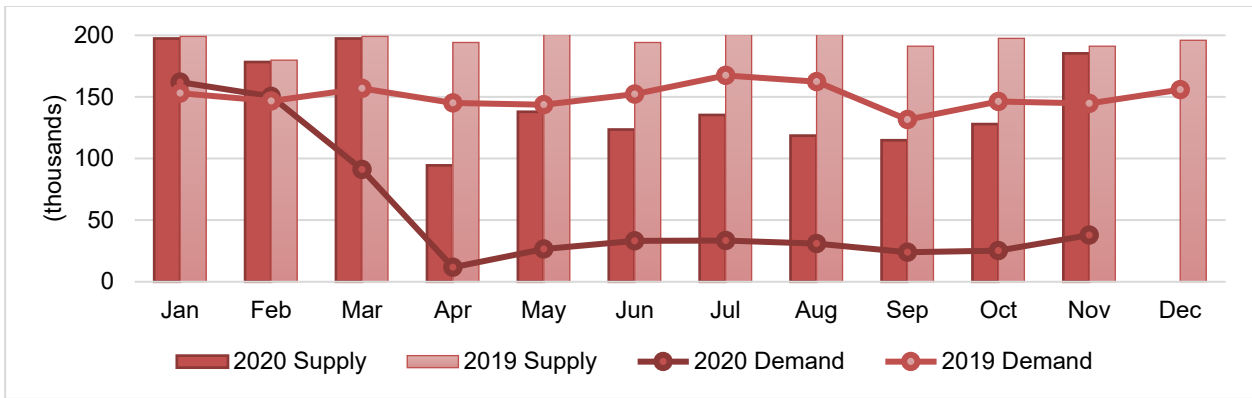
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**Figure 14: Monthly Island of Hawai'i Hotel Performance, 2020 vs. 2019**



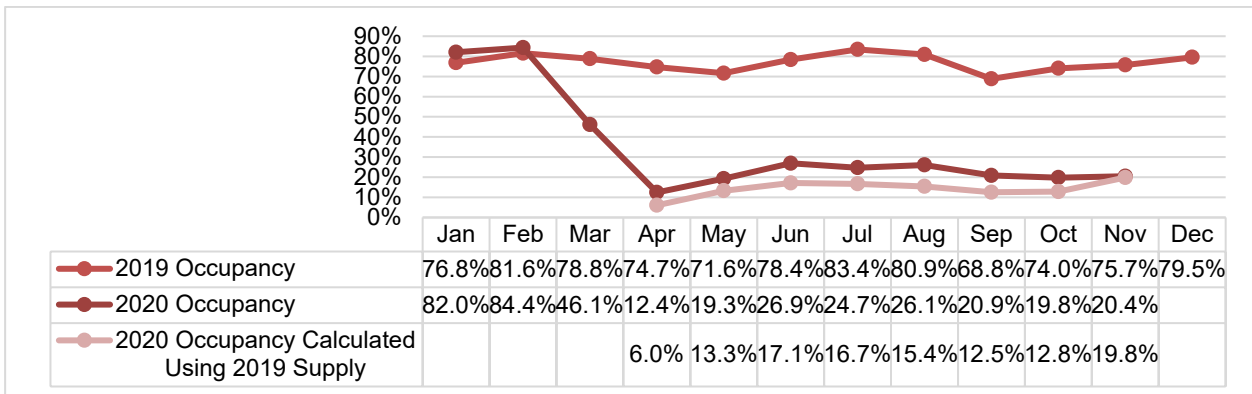
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**Figure 15: Monthly Island of Hawai'i Hotel Supply and Demand, 2020 vs. 2019**



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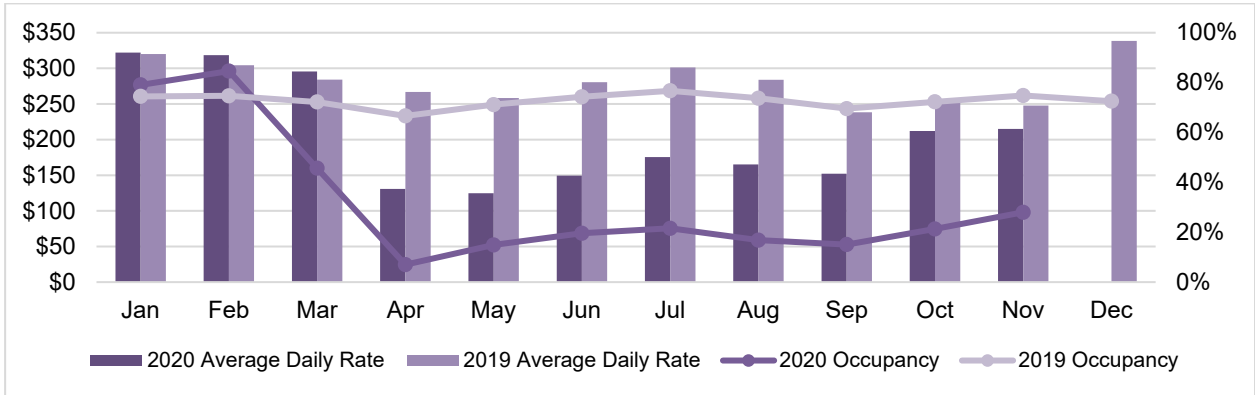
**Figure 16: Monthly Island of Hawai'i Hotel Occupancy, 2019, 2020, and Calculated 2020 Occupancy using 2019 Supply**



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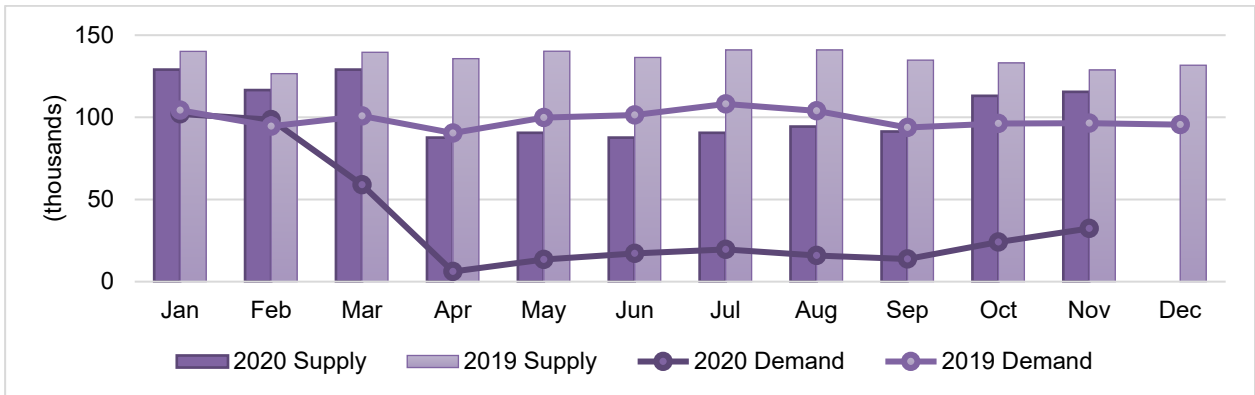


**Figure 17: Monthly Kaua'i Hotel Performance, 2020 vs. 2019**



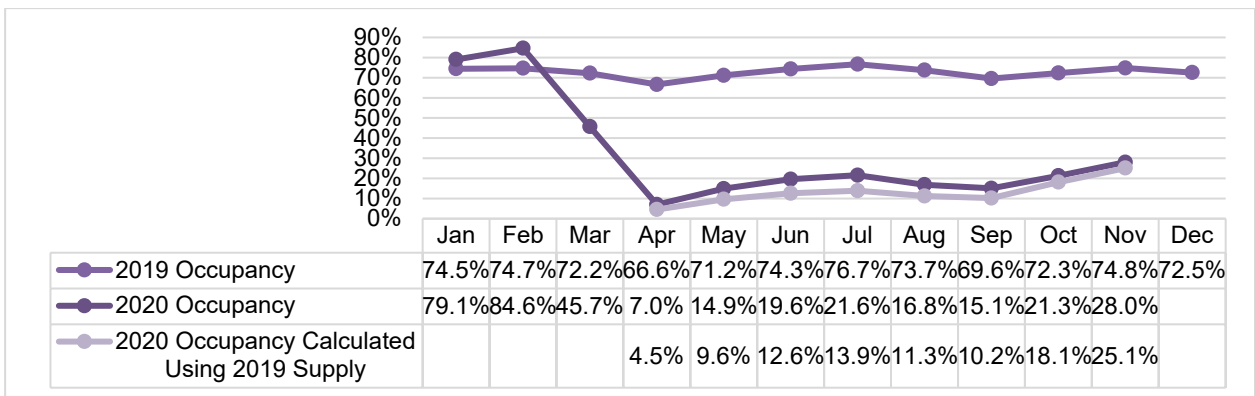
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**Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2020 vs. 2019**



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



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