



April 2021 Hawai'i Hotel Performance Report

In April 2021, Hawai'i hotels statewide reported substantially higher revenue per available room (RevPAR), average daily rate (ADR), and occupancy compared to April 2020, which was the first full month of the devastating impact from the COVID-19 pandemic. Hawai'i's quarantine order for travelers due to the COVID-19 pandemic began on March 26, 2020, which immediately resulted in dramatic declines for the hotel industry. Year-to-date, the statistics for statewide hotel RevPAR and occupancy were much lower compared to the first four months of 2020.

According to the *Hawai'i Hotel Performance Report* published by the Hawai'i Tourism Authority's (HTA) Research Division, statewide RevPAR in April 2021 was \$153, which was more than 1,000 percent higher than last April. ADR was more than double last year's level (\$300, +138.6%), and occupancy was 50.8 percent (+42.0 percentage points), which would have been disappointing performance pre-pandemic (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. For April, the survey included 138 properties¹ representing 43,760 rooms, or 81.0 percent of all lodging properties and 84.4 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 April 2021, 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 Hawai'i. Kaua'i County rejoined the Safe Travels program on April 5, 2021. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in April.

Hawai'i hotel room revenues statewide rose to \$237.2 million (+2,210.8%) in April. Room demand was 789,800 room nights (+868.5%) and room supply was 1.6 million room nights (+67.3%) (Figure 2). Many properties closed or reduced operations starting in April 2020. If occupancy for April 2021 was calculated based on the pre-pandemic room supply from April 2019, occupancy would be 12.2 percent for the month (Figure 7). Due to these supply reductions, comparative data for certain markets and price classes were not available for April.

Luxury Class properties earned RevPAR of \$335², with ADR at \$720 and occupancy of 46.5 percent. Midscale & Economy Class properties earned RevPAR of \$148 (+616.2%) with ADR at \$261 (+186.8%) and occupancy of 56.8 percent (+34.0 percentage points).

Maui County hotels led the counties in April RevPAR of \$300 (+2,220%), with ADR at \$483 (+333.5%) and occupancy of 62.1 percent (+50.5 percentage points). Maui's luxury resort region of Wailea had RevPAR of \$420², with ADR at \$773 and occupancy of 54.4 percent. The

¹ Based on 2019 census rooms.

² Comparative data for April 2020 were not available.

Lahaina/Kā'anapali/Kapalua region had RevPAR of \$251 (+6,222.4%), ADR at \$399 (+407.2%) and occupancy of 62.9 percent (+57.8 percentage points).

Hotels on the island of Hawai'i reported RevPAR at \$175 (+1,360.3%), with ADR at \$326 (+205.0%) and occupancy of 53.7 percent (+42.5 percentage points). Kohala Coast hotels earned RevPAR of \$303², with ADR at \$471, and occupancy of 64.4 percent.

Kaua'i hotels earned RevPAR of \$91 (+883.5%), with ADR at \$248 (+86.8%) and occupancy of 36.9 percent (+29.9 percentage points).

O'ahu hotels reported RevPAR of \$91 (+758.8%) in April, ADR at \$193 (+40.8%) and occupancy of 47.0 percent (+39.3 percentage points). Waikīkī hotels earned \$84 (+1,147.3%) in RevPAR with ADR at \$181 (+37.1%) and occupancy of 46.4 percent (+41.3 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 April, the survey included 138 properties³ representing 43,760 rooms, or 81.0 percent of all lodging properties and 84.4 percent of operating lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The April survey included 70 properties on O'ahu representing 26,683 rooms (92.7% of operating properties); 37 properties in the County of Maui, representing 9,277 rooms (73.2% of operating properties); 17 properties on the island of Hawai'i, representing 4,799 rooms (73.4% of operating properties); and 14 properties on Kaua'i, representing 3,001 rooms (78.0% of operating properties).

³ Based on 2019 census rooms.

Figure 1: Hawai'i Hotel Performance April 2021

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2020	Percentage Pt. Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	50.8%	8.8%	42.0%	\$300.27	\$125.85	138.6%	\$152.52	\$11.05	1280.3%
Luxury Class	46.5%	NA	NA	\$719.68	NA	NA	\$334.73	NA	NA
Upper Upscale Class	47.5%	4.5%	42.9%	\$277.45	\$156.04	77.8%	\$131.77	\$7.10	1755.9%
Upscale Class	56.0%	6.7%	49.3%	\$206.85	\$141.98	45.7%	\$115.87	\$9.54	1114.6%
Upper Midscale Class	52.8%	13.4%	39.4%	\$150.65	\$127.82	17.9%	\$79.55	\$17.15	363.8%
Midscale & Economy Class	56.8%	22.7%	34.0%	\$260.52	\$90.83	186.8%	\$147.96	\$20.66	616.2%
O'ahu	47.0%	7.7%	39.3%	\$192.77	\$136.94	40.8%	\$90.60	\$10.55	758.8%
Waikiki	46.4%	5.1%	41.3%	\$181.28	\$132.19	37.1%	\$84.19	\$6.75	1147.3%
Other O'ahu	50.6%	21.2%	29.4%	\$262.15	\$142.89	83.5%	\$132.76	\$30.29	338.3%
O'ahu Luxury	37.0%	NA	NA	\$553.77	NA	NA	\$204.94	NA	NA
O'ahu Upper Upscale	40.6%	3.8%	36.8%	\$214.15	\$162.05	32.1%	\$86.91	\$6.08	1329.4%
O'ahu Upscale	57.7%	8.2%	49.5%	\$165.95	\$161.46	2.8%	\$95.78	\$13.19	626.2%
O'ahu Upper Midscale	50.6%	10.7%	39.9%	\$133.05	\$132.52	0.4%	\$67.34	\$14.14	376.2%
O'ahu Midscale & Economy	59.6%	24.4%	35.2%	\$97.17	\$87.69	10.8%	\$57.91	\$21.41	170.5%
Maui County	62.1%	11.6%	50.5%	\$482.80	\$111.38	333.5%	\$299.97	\$12.93	2220.0%
Wailea	54.4%	NA	NA	\$773.31	NA	NA	\$420.45	NA	NA
Lahaina/Kā'anapali/Kapalua	62.9%	5.0%	57.8%	\$399.24	\$78.71	407.2%	\$251.00	\$3.97	6222.4%
Other Maui County	61.3%	19.8%	41.5%	\$584.84	\$121.75	380.3%	\$358.25	\$24.08	1387.7%
Maui County Luxury	52.3%	NA	NA	\$839.05	NA	NA	\$438.94	NA	NA
Maui County Upper Upscale & Upscale	64.3%	3.9%	60.4%	\$355.11	\$154.84	129.3%	\$228.44	\$6.06	3669.6%
Island of Hawai'i	53.7%	11.2%	42.5%	\$326.23	\$106.95	205.0%	\$175.23	\$12.00	1360.3%
Kohala Coast	64.4%	NA	NA	\$470.92	NA	NA	\$303.25	\$0.00	NA
Kauai	36.9%	7.0%	29.9%	\$247.96	\$132.74	86.8%	\$91.47	\$9.30	883.5%

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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 April 2021

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	1,555.0	929.2	67.3%	789.8	81.6	868.5%	237.2	10.3	2210.8%
O'ahu	863.3	560.0	54.2%	405.7	43.2	840.0%	78.2	5.9	1223.2%
Waikiki	749.4	469.6	59.6%	348.1	24.0	1351.1%	63.1	3.2	1889.9%
Maui County	380.1	170.9	122.4%	236.2	19.8	1090.3%	114.0	2.2	5059.8%
Wailea	83.1	NA	NA	45.2	NA	NA	34.9	NA	NA
Lahaina/Kā'anapali/Kapalua	206.6	94.8	117.9%	129.9	4.8	2614.4%	51.8	0.4	13667.9%
Island of Hawai'i	196.1	110.5	77.4%	105.3	12.4	749.2%	34.4	1.3	2490.2%
Kohala Coast	83.9	NA	NA	54.0	NA	NA	25.4	NA	NA
Kauai	115.5	87.7	31.7%	42.6	6.1	593.1%	10.6	0.8	1194.7%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2020	Percentage Pt. Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	37.0%	60.6%	-23.6%	\$280.21	\$301.13	-6.9%	\$103.75	\$182.59	-43.2%
Luxury Class	32.5%	61.3%	-28.8%	\$746.89	\$617.63	20.9%	\$242.85	\$378.72	-35.9%
Upper Upscale Class	32.7%	60.8%	-28.1%	\$266.09	\$296.14	-10.1%	\$86.94	\$179.99	-51.7%
Upscale Class	42.2%	57.7%	-15.6%	\$193.99	\$230.91	-16.0%	\$81.78	\$133.32	-38.7%
Upper Midscale Class	42.3%	61.8%	-19.6%	\$141.30	\$174.42	-19.0%	\$59.73	\$107.84	-44.6%
Midscale & Economy Class	43.1%	64.6%	-21.5%	\$205.70	\$193.94	6.1%	\$88.65	\$125.21	-29.2%
O'ahu	35.2%	61.0%	-25.8%	\$181.53	\$240.33	-24.5%	\$63.88	\$146.61	-56.4%
Waikiki	33.9%	60.3%	-26.5%	\$172.83	\$236.81	-27.0%	\$58.54	\$142.87	-59.0%
Other O'ahu	44.2%	64.9%	-20.7%	\$227.22	\$259.13	-12.3%	\$100.45	\$168.13	-40.3%
O'ahu Luxury	25.1%	58.1%	-33.0%	\$531.56	\$515.89	3.0%	\$133.57	\$299.70	-55.4%
O'ahu Upper Upscale	27.6%	58.8%	-31.2%	\$209.23	\$262.00	-20.1%	\$57.74	\$154.12	-62.5%
O'ahu Upscale	46.0%	62.9%	-16.9%	\$162.69	\$202.41	-19.6%	\$74.79	\$127.29	-41.2%
O'ahu Upper Midscale	40.7%	61.5%	-20.8%	\$127.45	\$164.44	-22.5%	\$51.88	\$101.11	-48.7%
O'ahu Midscale & Economy	48.2%	70.9%	-22.8%	\$95.80	\$134.68	-28.9%	\$46.16	\$95.56	-51.7%
Maui County	41.2%	60.4%	-19.2%	\$467.40	\$456.76	2.3%	\$192.46	\$276.00	-30.3%
Wailea	37.1%	70.6%	-33.5%	\$783.22	\$700.74	11.8%	\$290.40	\$494.40	-41.3%
Lahaina/Kā'anapali/Kapalua	39.5%	59.1%	-19.6%	\$384.07	\$388.04	-1.0%	\$151.62	\$229.38	-33.9%
Other Maui County	43.2%	62.0%	-18.8%	\$558.04	\$535.72	4.2%	\$241.06	\$332.21	-27.4%
Maui County Luxury	35.9%	64.1%	-28.3%	\$856.33	\$735.28	16.5%	\$307.13	\$471.68	-34.9%
Maui County Upper Upscale & Upscale	42.5%	59.6%	-17.1%	\$337.34	\$372.40	-9.4%	\$143.38	\$222.03	-35.4%
Island of Hawai'i	41.3%	61.6%	-20.3%	\$303.20	\$293.56	3.3%	\$125.11	\$180.73	-30.8%
Kohala Coast	44.7%	67.3%	-22.6%	\$463.52	\$454.89	1.9%	\$207.07	\$306.25	-32.4%
Kaua'i	28.4%	57.1%	-28.7%	\$208.86	\$311.09	-32.9%	\$59.40	\$177.77	-66.6%

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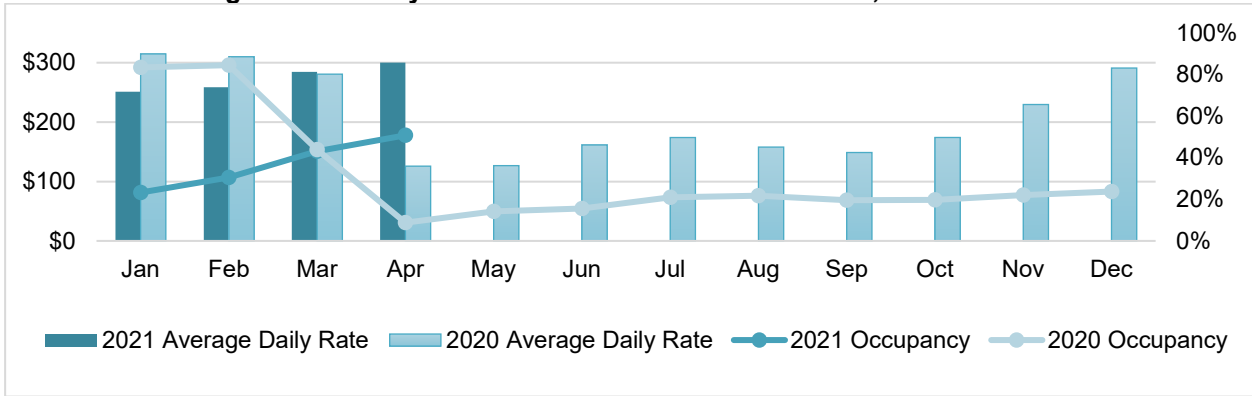
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2021	2020	% Change	2021	2020	% Change	2021	2020	% Change
State of Hawai'i	6,074.0	5,810.5	4.5%	2,249.0	3,523.1	-36.2%	630.2	1,060.9	-40.6%
O'ahu	3,354.0	3,315.6	1.2%	1,180.2	2,022.6	-41.7%	214.2	486.1	-55.9%
Waikiki	2,926.8	2,824.7	3.6%	991.4	1,704.2	-41.8%	171.3	403.6	-57.5%
Maui County	1,520.6	1,315.0	15.6%	626.1	794.6	-21.2%	292.7	362.9	-19.4%
Wailea	332.3	251.0	32.4%	123.2	177.1	-30.4%	96.5	124.1	-22.3%
Lahaina/Kā'anapali/Kapalua	826.3	718.8	15.0%	326.2	424.9	-23.2%	125.3	164.9	-24.0%
Island of Hawai'i	792.0	713.5	11.0%	326.8	439.3	-25.6%	69.4	129.0	-46.2%
Kohala Coast	335.2	258.1	29.9%	149.7	173.7	-13.8%	99.1	79.0	25.4%
Kaua'i	407.4	466.4	-12.6%	115.9	266.5	-56.5%	24.2	82.9	-70.8%

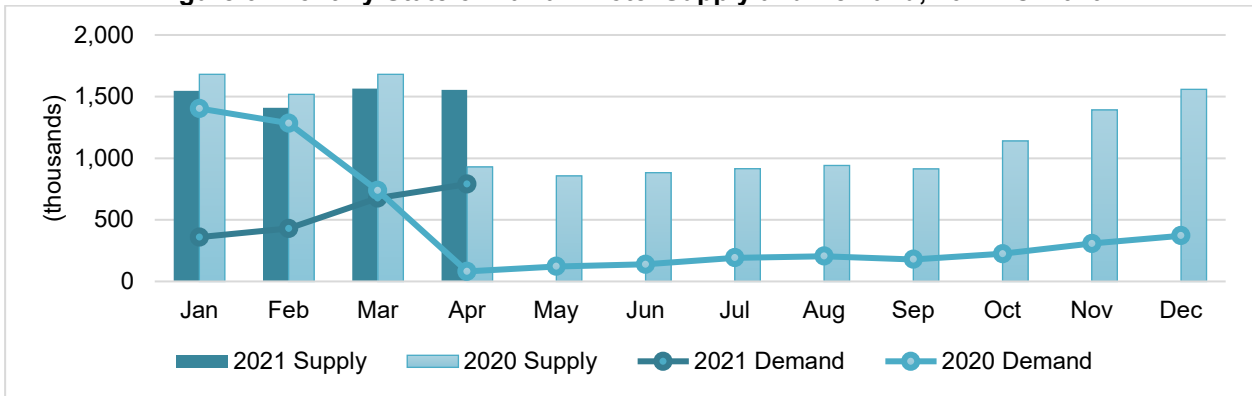
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2021 vs. 2020



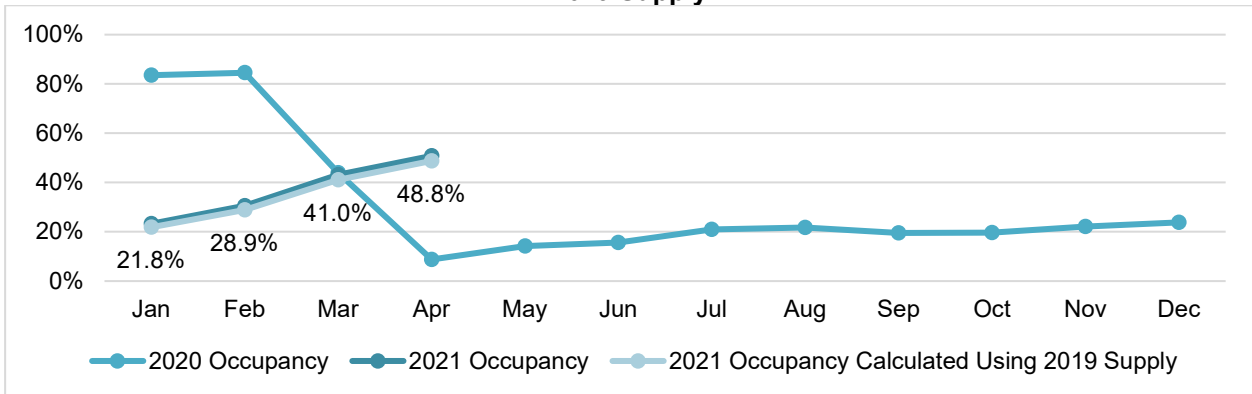
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2021 vs. 2020



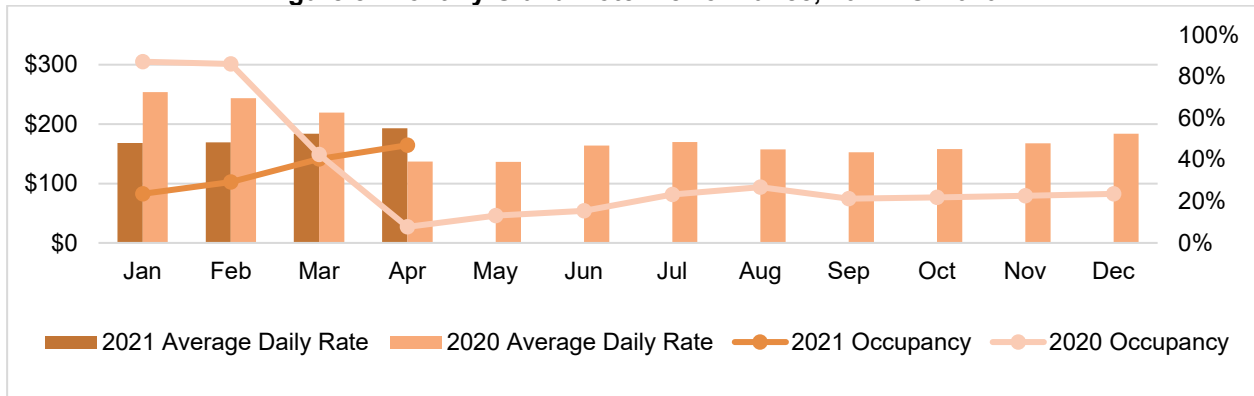
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Figure 7: Monthly State of Hawai'i Hotel Occupancy, 2021 vs. 2020 and 2020 Calculated with 2019 Supply



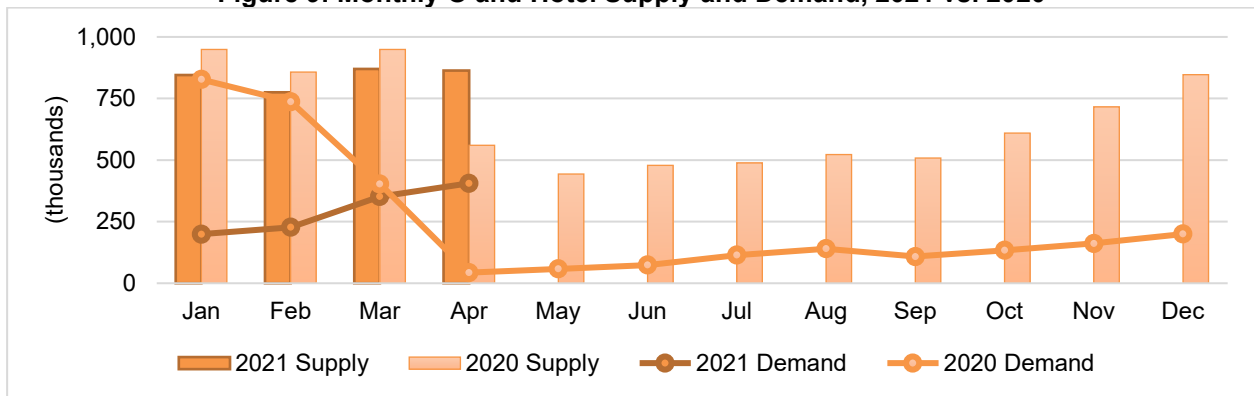
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Figure 8: Monthly O'ahu Hotel Performance, 2021 vs. 2020



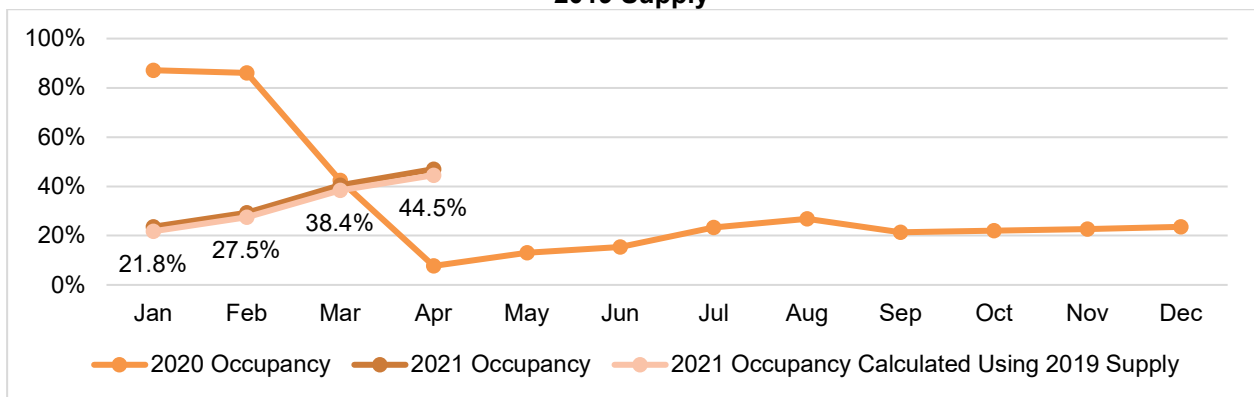
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Figure 9: Monthly O'ahu Hotel Supply and Demand, 2021 vs. 2020



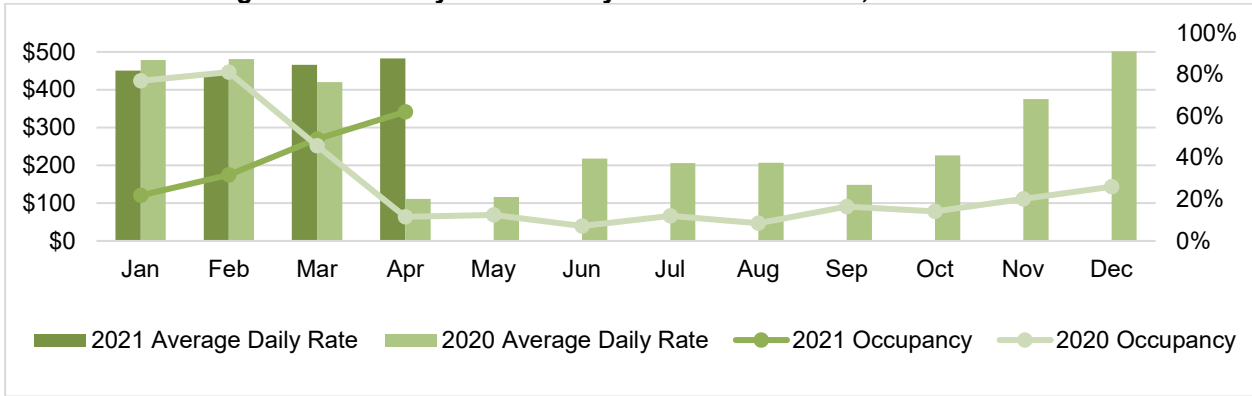
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Figure 10: Monthly O'ahu Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



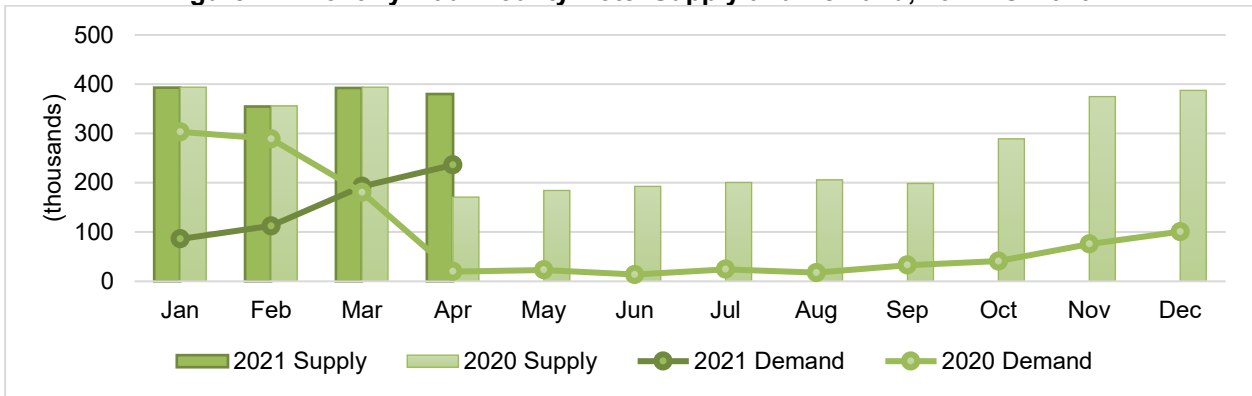
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Figure 11: Monthly Maui County Hotel Performance, 2021 vs. 2020



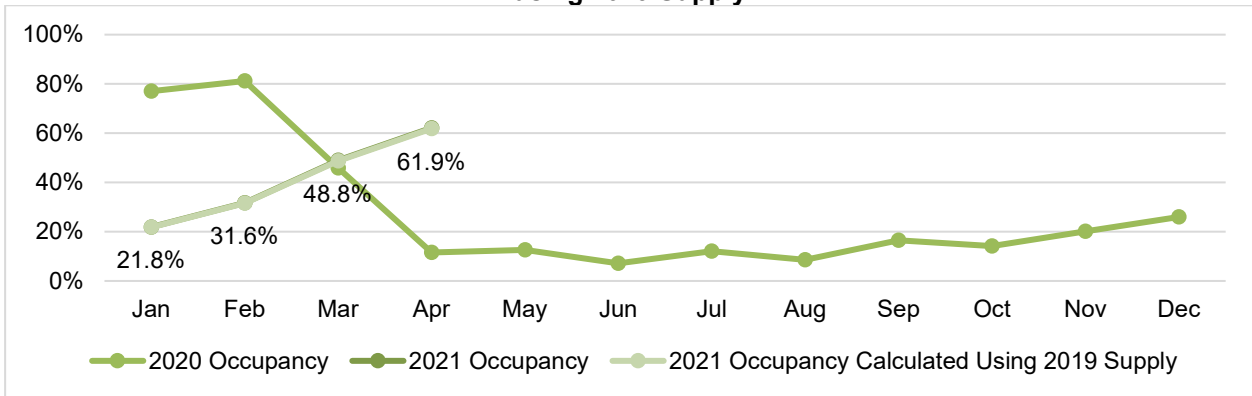
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Figure 12: Monthly Maui County Hotel Supply and Demand, 2021 vs. 2020



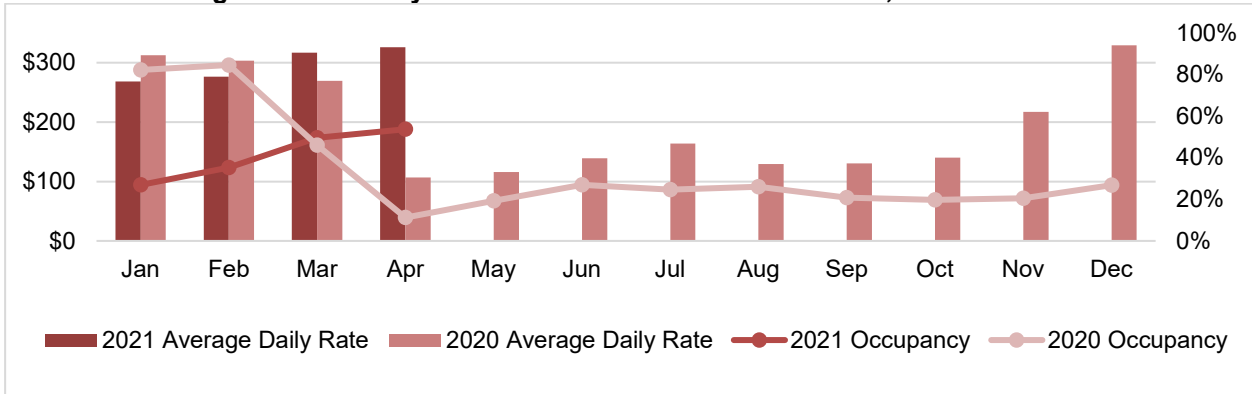
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Figure 13: Monthly Maui County Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



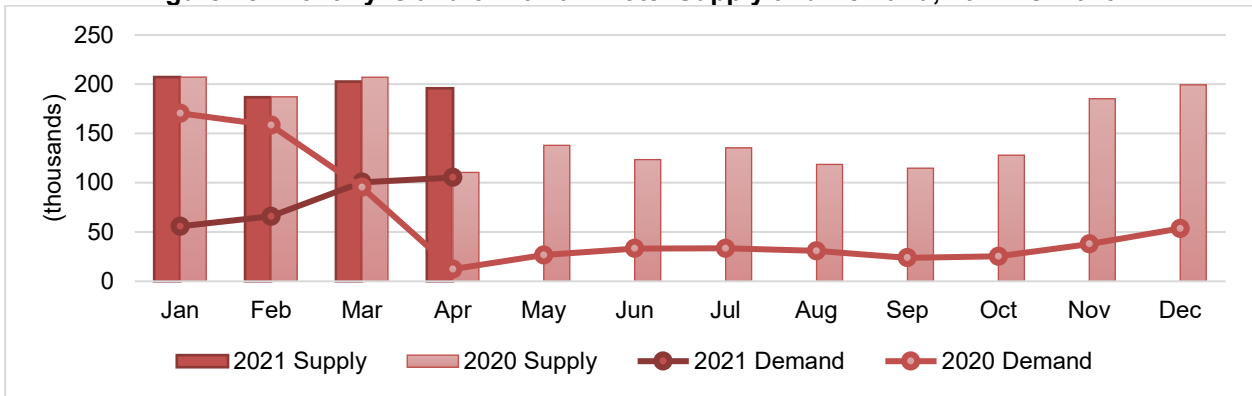
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Figure 14: Monthly Island of Hawai'i Hotel Performance, 2021 vs. 2020



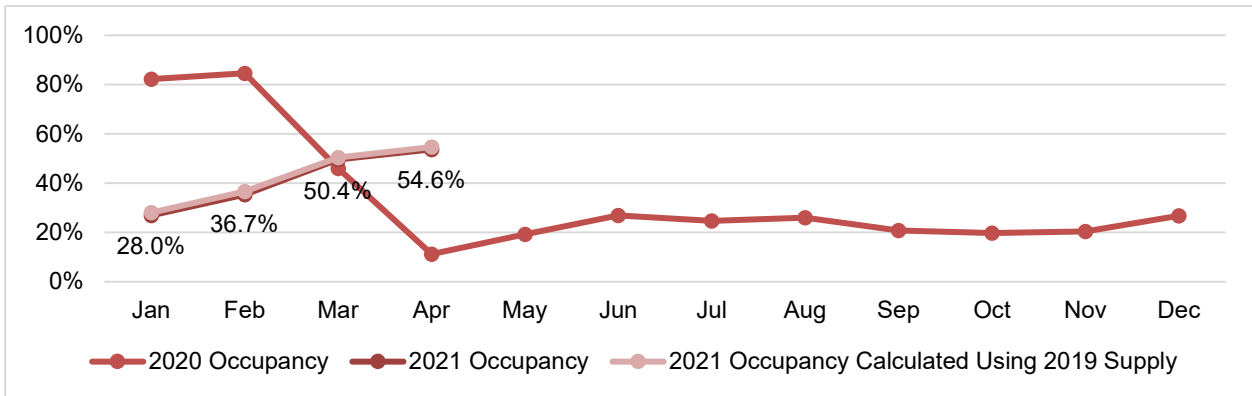
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Figure 15: Monthly Island of Hawai'i Hotel Supply and Demand, 2021 vs. 2020



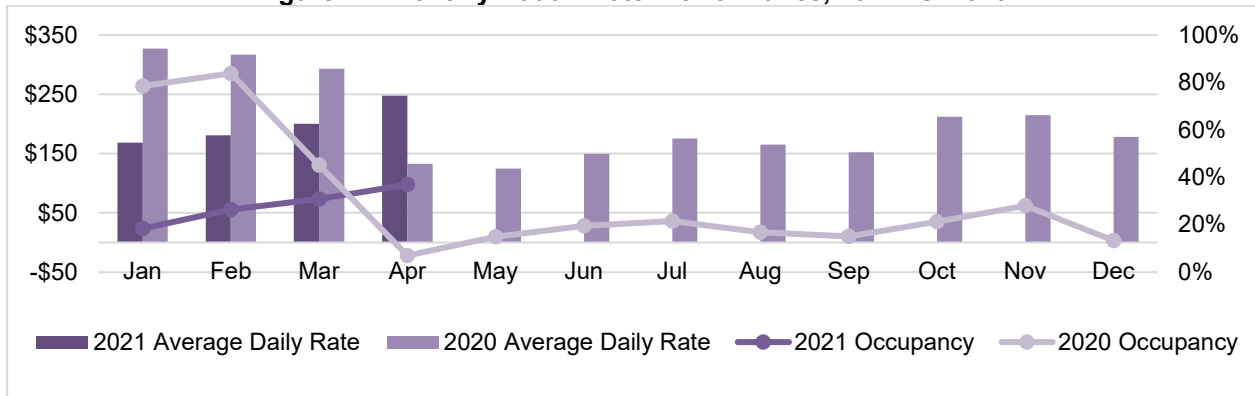
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Figure 16: Monthly Island of Hawai'i Hotel Occupancy, 2020, 2021, and Calculated 2021 Occupancy using 2019 Supply



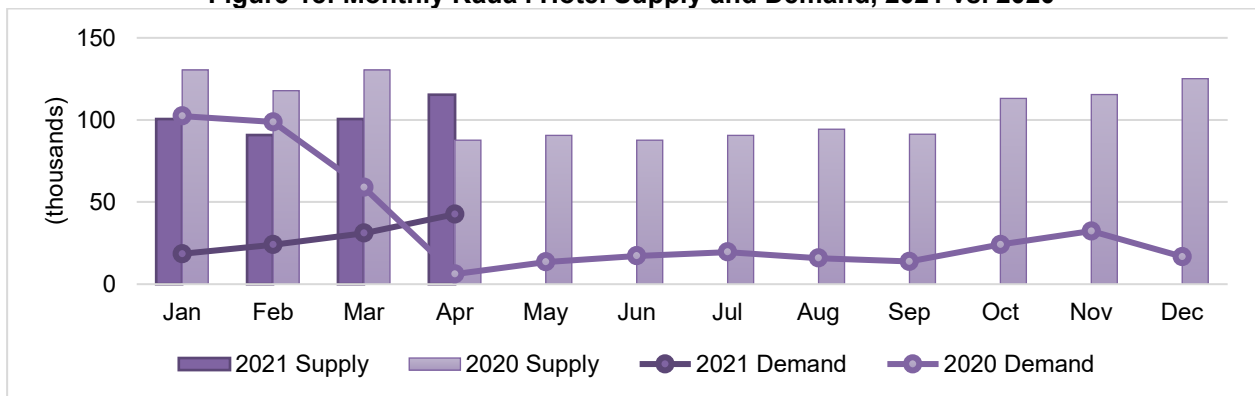
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Figure 17: Monthly Kaua'i Hotel Performance, 2021 vs. 2020



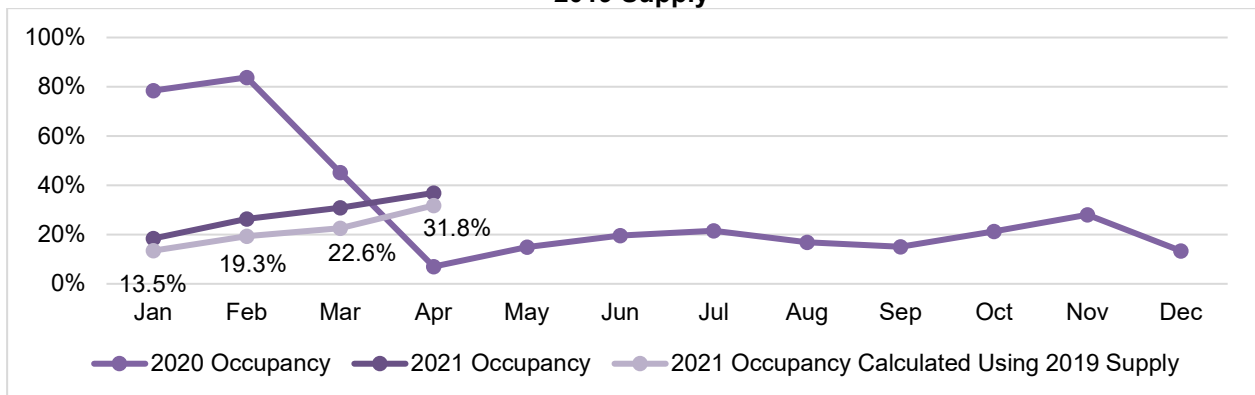
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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2021 vs. 2020



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



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