



June 2023 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported slightly lower revenue per available room (RevPAR) but slightly higher occupancy in June 2023 compared to June 2022. Average daily rate (ADR) was lower than last year. When compared to pre-pandemic June 2019, statewide ADR and RevPAR were higher in June 2023 but occupancy was lower.

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in June 2023 was \$298 (-0.8%), with ADR at \$389 (-2.0%) and occupancy of 76.7 percent (+0.9 percentage points) compared to June 2022 (Figure 1). Compared with June 2019, RevPAR was 26.6 percent higher, driven by higher ADR (+38.6%) which offset lower occupancy (-7.3 percentage points) (Figure 3).

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 June 2023, the survey included 154 properties representing 46,622 rooms, or 83.3 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including those offering full service, limited service, and condominium hotels. Vacation rental and timeshare properties were not included in this survey.

Statewide Hawai'i hotel room revenues totaled \$500.7 million (-1.2% vs. 2022, +31.1% vs. 2019) in June 2023. Room demand was 1.3 million room nights (+0.8% vs. 2022, -5.5% vs. 2019) and room supply was 1.7 million room nights (-0.4% vs. 2022, +3.5% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$529 (-5.0% vs. 2022, +19.3% vs. 2019), with ADR at \$853 (-5.6% vs. 2022, +54.1% vs. 2019) and occupancy of 62.0 percent (+0.4 percentage points vs. 2022, -18.0 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$196 (+4.9% vs. 2022, +41.5% vs. 2019) with ADR at \$252 (-1.8% vs. 2022, +49.4% vs. 2019) and occupancy of 77.5 percent (+4.9 percentage points vs. 2022, -4.4 percentage points vs. 2019).

Maui County hotels led the counties in June 2023 and achieved RevPAR of \$419 (-8.7% vs. 2022, +31.9% vs. 2019), with ADR at \$623 (-3.8% vs. 2022, +58.1% vs. 2019) and occupancy of 67.2 percent (-3.6 percentage points vs. 2022, -13.4 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$624 (-5.1% vs. 2022, +11.1% vs. 2019), with ADR at \$939 (-8.6% vs. 2022, +52.3% vs. 2019) and occupancy of 66.5 percent (+2.4 percentage points vs. 2022, -24.6 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$391 (-9.3% vs. 2022, +44.9% vs. 2019), ADR at \$565 (-3.1% vs. 2022, +70.0% vs. 2019) and occupancy of 69.3 percent (-4.7 percentage points vs. 2022, -12.0 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$325 (-6.3% vs. 2022, +55.8% vs. 2019), with ADR at \$434 (+3.3% vs. 2022, +54.8% vs. 2019) and occupancy of 74.8 percent (-7.7 percentage points vs. 2022, +0.5 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$286 (-9.7% vs. 2022, +46.5% vs. 2019), with ADR at \$410 (-3.5% vs. 2022, +64.8% vs. 2019), and occupancy of 69.7 percent (-4.8 percentage points vs. 2022, -8.7 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$416

(-8.6% vs. 2022, +48.5% vs. 2019), with ADR at \$572 (-10.7% vs. 2022, +62.9% vs. 2019), and occupancy of 72.8 percent (+1.7 percentage points vs. 2022, -7.1 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$242 (+10.5% vs. 2022, +13.0% vs. 2019) in June, ADR at \$291 (+3.2% vs. 2022, +20.0% vs. 2019) and occupancy of 82.9 percent (+5.5 percentage points vs. 2022, -5.1 percentage points vs. 2019). Waikīkī hotels earned RevPAR of \$233 (+11.6% vs. 2022, +11.1% vs. 2019), with ADR at \$279 (+3.7% vs. 2022, +17.5% vs. 2019) and occupancy of 83.4 percent (+5.9 percentage points vs. 2022, -4.8 percentage points vs. 2019).

First Half 2023

In the first half of 2023, Hawai'i's hotels earned \$285 in RevPAR (+7.0% vs. 2022, +26.3% vs. 2019), with ADR at \$380 (+3.9% vs. 2022, +35.6% vs. 2019) and occupancy of 74.9 percent (+2.2 percentage points vs. 2022, -5.5 percentage points vs. 2019).

Total statewide hotel revenues for the first half of 2023 were \$2.9 billion (+6.6% vs. 2022, +30.4% vs. 2019). Room supply was 10.1 million room nights (-0.4% vs. 2022, +3.3% vs. 2019), and room demand was 7.6 million room nights (+2.6% vs. 2022, -3.8% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest first half 2023 RevPAR at \$285 (+7.0%). New York, New York was second at \$205 (+23.2%), followed by Miami, Florida at \$187 (-7.1%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in first half 2023 ADR at \$380 (+3.9%), followed by New York, New York at \$264 (+8.7%) and Miami, Florida at \$249 (-5.8%) (Figure 20).

For the first half 2023, Las Vegas, Nevada topped the country in occupancy at 78.0 percent (+5.2 percentage points), followed by New York, New York at 77.6 percent (+9.1 percentage points) and Orlando, Florida at 76.4 percent (+2.3 percentage points) (Figure 21). The Hawaiian Islands at 74.9 percent occupancy was ranked sixth (Figure 21).

Comparison to International Markets

Hotels in French Polynesia ranked highest for first half 2023 RevPAR for international "sun and sea" destinations at \$583 (+39.3%), followed by Maldives (\$431, -4.7%). Maui County (\$419, +1.9%), Kaua'i (\$308, +3.3%), Hawai'i Island (\$301, -3.8%), and O'ahu (\$216, +16.9%) ranked third, fifth, sixth, and ninth, respectively (Figure 22).

Hotels in French Polynesia led in first half 2023 ADR at \$792 (+17.2%), followed by Maldives (\$664, -2.0%) and Maui County (\$618, +2.9%). Hawai'i Island (\$415, -0.8%), Kaua'i (\$411, +6.8%), and O'ahu (\$274, +9.2%) ranked sixth, seventh, and ninth, respectively (Figure 23).

O'ahu led in occupancy for "sun and sea" destinations at 78.8 percent (+5.2 percentage points), followed by Puerto Vallarta (78.1%, +3.6 percentage points) and Puerto Rico (77.2%, +6.2 percentage points). Kaua'i (74.8%, -2.5 percentage points), Hawai'i Island (72.6%, -2.3 percentage points), and Maui County (67.8%, -0.6 percentage points) ranked fifth, ninth, and twelfth, respectively (Figure 24).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaii tourism authority.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 June 2023, the survey included 154 properties representing 46,622 rooms, or 83.3 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The June survey included 76 properties on O'ahu, representing 28,130 rooms (92.5%); 41 properties in the County of Maui, representing 9,798 rooms (70.6%); 17 properties on the island of Hawai'i, representing 4,990 rooms (72.8%); and 20 properties on Kaua'i, representing 3,704 rooms (76.3%).

About the Hawai'i Tourism Authority

The Hawai'i Tourism Authority is the state agency responsible for holistically managing tourism in a sustainable manner consistent with community desires, economic goals, cultural values, preservation of natural resources, and visitor industry needs. HTA works with the community and industry to *Mālama Ku'u Home* – care for our beloved home. For more information about HTA, visit www.hawaiiitourismauthority.org or follow @HawaiiHTA on [Facebook](#), [Instagram](#), and [Twitter](#).

Figure 1: Hawai'i Hotel Performance June 2023

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2022	Percentage Pt. Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	76.7%	75.8%	0.9%	\$388.83	\$396.73	-2.0%	\$298.10	\$300.65	-0.8%
Luxury Class	62.0%	61.6%	0.4%	\$853.30	\$904.22	-5.6%	\$528.69	\$556.80	-5.0%
Upper Upscale Class	81.3%	79.8%	1.5%	\$371.51	\$374.38	-0.8%	\$302.01	\$298.88	1.0%
Upscale Class	79.8%	79.2%	0.6%	\$272.09	\$278.27	-2.2%	\$217.14	\$220.31	-1.4%
Upper Midscale Class	72.2%	75.2%	-3.0%	\$233.56	\$244.20	-4.4%	\$168.72	\$183.76	-8.2%
Midscale & Economy Class	77.5%	72.6%	4.9%	\$252.41	\$256.98	-1.8%	\$195.69	\$186.54	4.9%
O'ahu	82.9%	77.3%	5.5%	\$291.48	\$282.46	3.2%	\$241.50	\$218.46	10.5%
Waikiki	83.4%	77.5%	5.9%	\$278.86	\$268.96	3.7%	\$232.55	\$208.45	11.6%
Other O'ahu	79.8%	76.4%	3.4%	\$365.24	\$359.72	1.5%	\$291.58	\$274.97	6.0%
O'ahu Luxury	61.7%	57.3%	4.4%	\$685.27	\$714.48	-4.1%	\$423.13	\$409.56	3.3%
O'ahu Upper Upscale	85.5%	80.6%	5.0%	\$309.23	\$294.45	5.0%	\$264.54	\$237.25	11.5%
O'ahu Upscale	88.1%	82.9%	5.1%	\$218.33	\$214.40	1.8%	\$192.27	\$177.83	8.1%
O'ahu Upper Midscale	77.5%	73.4%	4.1%	\$175.25	\$168.24	4.2%	\$135.82	\$123.46	10.0%
O'ahu Midscale & Economy	82.9%	71.7%	11.2%	\$159.13	\$152.66	4.2%	\$131.95	\$109.41	20.6%
Maui County	67.2%	70.8%	-3.6%	\$623.00	\$647.63	-3.8%	\$418.74	\$458.60	-8.7%
Wailea	66.5%	64.0%	2.4%	\$939.09	\$1,027.57	-8.6%	\$624.03	\$657.86	-5.1%
Lahaina/Kā'anapali/Kapalua	69.3%	74.0%	-4.7%	\$565.08	\$583.01	-3.1%	\$391.43	\$431.37	-9.3%
Other Maui County	64.7%	66.9%	-2.2%	\$698.41	\$734.91	-5.0%	\$451.97	\$491.86	-8.1%
Maui County Luxury	59.0%	57.9%	1.1%	\$1,036.17	\$1,126.55	-8.0%	\$611.46	\$652.46	-6.3%
Maui County Upper Upscale & Upscale	71.1%	76.0%	-5.0%	\$520.08	\$542.25	-4.1%	\$369.63	\$412.33	-10.4%
Island of Hawai'i	69.7%	74.4%	-4.8%	\$410.39	\$425.31	-3.5%	\$285.96	\$316.61	-9.7%
Kohala Coast	72.8%	71.1%	1.7%	\$571.58	\$639.76	-10.7%	\$415.94	\$454.93	-8.6%
Kauai	74.8%	82.4%	-7.7%	\$434.13	\$420.24	3.3%	\$324.70	\$346.48	-6.3%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

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 June 2023

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2022	% Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	1,679.7	1,685.9	-0.4%	1,287.7	1,277.7	0.8%	500.7	506.9	-1.2%
O'ahu	912.1	920.3	-0.9%	755.7	711.8	6.2%	220.3	201.0	9.6%
Waikiki	773.8	781.8	-1.0%	645.3	605.9	6.5%	179.9	163.0	10.4%
Maui County	416.5	417.6	-0.3%	279.9	295.7	-5.3%	174.4	191.5	-8.9%
Wailea	88.7	88.9	-0.2%	59.0	56.9	3.6%	55.4	58.5	-5.3%
Lahaina/Kā'anapali/ Kapalua	228.6	229.6	-0.5%	158.3	169.9	-6.8%	89.5	99.1	-9.7%
Island of Hawai'i	205.5	209.9	-2.1%	143.2	156.2	-8.3%	58.8	66.4	-11.6%
Kohala Coast	88.6	89.3	-0.8%	64.5	63.5	1.5%	36.8	40.6	-9.3%
Kauai	145.7	138.2	5.4%	109.0	114.0	-4.4%	47.3	47.9	-1.2%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

Figure 3: Hawai'i Hotel Performance June 2023 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2019	Percentage Pt. Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	76.7%	83.9%	-7.3%	\$388.83	\$280.51	38.6%	\$298.10	\$235.44	26.6%
Luxury Class	62.0%	80.0%	-18.0%	\$853.30	\$553.86	54.1%	\$528.69	\$443.10	19.3%
Upper Upscale Class	81.3%	86.6%	-5.3%	\$371.51	\$281.87	31.8%	\$302.01	\$244.19	23.7%
Upscale Class	79.8%	81.2%	-1.4%	\$272.09	\$206.74	31.6%	\$217.14	\$167.94	29.3%
Upper Midscale Class	72.2%	86.5%	-14.3%	\$233.56	\$166.74	40.1%	\$168.72	\$144.23	17.0%
Midscale & Economy Class	77.5%	81.9%	-4.4%	\$252.41	\$168.95	49.4%	\$195.69	\$138.34	41.5%
O'ahu	82.9%	87.9%	-5.1%	\$291.48	\$242.90	20.0%	\$241.50	\$213.63	13.0%
Waikiki	83.4%	88.2%	-4.8%	\$278.86	\$237.35	17.5%	\$232.55	\$209.37	11.1%
Other O'ahu	79.8%	86.4%	-6.5%	\$365.24	\$277.10	31.8%	\$291.58	\$239.33	21.8%
O'ahu Luxury	61.7%	79.6%	-17.9%	\$685.27	\$478.26	43.3%	\$423.13	\$380.74	11.1%
O'ahu Upper Upscale	85.5%	89.3%	-3.8%	\$309.23	\$268.33	15.2%	\$264.54	\$239.72	10.4%
O'ahu Upscale	88.1%	89.3%	-1.2%	\$218.33	\$198.72	9.9%	\$192.27	\$177.48	8.3%
O'ahu Upper Midscale	77.5%	87.2%	-9.7%	\$175.25	\$162.77	7.7%	\$135.82	\$141.95	-4.3%
O'ahu Midscale & Economy	82.9%	88.8%	-5.9%	\$159.13	\$142.58	11.6%	\$131.95	\$126.64	4.2%
Maui County	67.2%	80.6%	-13.4%	\$623.00	\$393.97	58.1%	\$418.74	\$317.57	31.9%
Wailea	66.5%	91.1%	-24.6%	\$939.09	\$616.71	52.3%	\$624.03	\$561.61	11.1%
Lahaina/Kā'anapali/Kapalua	69.3%	81.2%	-12.0%	\$565.08	\$332.40	70.0%	\$391.43	\$270.05	44.9%
Other Maui County	64.7%	79.8%	-15.1%	\$698.41	\$473.97	47.4%	\$451.97	\$378.22	19.5%
Maui County Luxury	59.0%	85.1%	-26.1%	\$1,036.17	\$549.93	88.4%	\$611.46	\$468.15	30.6%
Maui County Upper Upscale & Upscale	71.1%	81.0%	-9.9%	\$520.08	\$311.71	66.8%	\$369.63	\$252.50	46.4%
Island of Hawai'i	69.7%	78.4%	-8.7%	\$410.39	\$249.05	64.8%	\$285.96	\$195.25	46.5%
Kohala Coast	72.8%	79.8%	-7.1%	\$571.58	\$350.89	62.9%	\$415.94	\$280.11	48.5%
Kaua'i	74.8%	74.3%	0.5%	\$434.13	\$280.48	54.8%	\$324.70	\$208.42	55.8%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

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 June 2023 vs. 2019

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2019	% Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	1,679.7	1,622.8	3.5%	1,287.7	1,362.1	-5.5%	500.7	382.1	31.1%
O'ahu	912.1	910.4	0.2%	755.7	800.7	-5.6%	220.3	194.5	13.3%
Waikiki	773.8	781.0	-0.9%	645.3	688.9	-6.3%	179.9	163.5	10.0%
Maui County	416.5	381.8	9.1%	279.9	307.7	-9.0%	174.4	121.2	43.8%
Wailea	88.7	65.8	34.8%	59.0	59.9	-1.6%	55.4	37.0	49.8%
Lahaina/Kā'anapali/ Kapalua	228.6	214.1	6.8%	158.3	173.9	-9.0%	89.5	57.8	54.8%
Island of Hawai'i	205.5	194.2	5.8%	143.2	152.2	-5.9%	58.8	37.9	55.0%
Kohala Coast	88.6	90.0	-1.6%	64.5	71.4	-9.7%	36.8	25.1	46.9%
Kaua'i	145.7	136.4	6.8%	109.0	101.4	7.5%	47.3	28.4	66.3%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

Figure 5: Hawai'i Hotel Performance Year-to-Date June 2023

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2022	Percentage Pt. Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	74.9%	72.7%	2.2%	\$379.68	\$365.36	3.9%	\$284.51	\$265.79	7.0%
Luxury Class	60.5%	60.0%	0.5%	\$846.77	\$848.59	-0.2%	\$512.40	\$509.07	0.7%
Upper Upscale Class	78.7%	75.6%	3.1%	\$353.48	\$337.43	4.8%	\$278.16	\$255.00	9.1%
Upscale Class	77.9%	75.9%	2.0%	\$274.82	\$259.38	6.0%	\$214.01	\$196.83	8.7%
Upper Midscale Class	73.5%	72.4%	1.1%	\$238.92	\$227.30	5.1%	\$175.59	\$164.61	6.7%
Midscale & Economy Class	76.6%	73.8%	2.9%	\$250.52	\$236.15	6.1%	\$191.98	\$174.22	10.2%
O'ahu	78.8%	73.6%	5.2%	\$274.20	\$251.07	9.2%	\$215.96	\$184.69	16.9%
Waikiki	78.9%	73.8%	5.1%	\$261.41	\$237.78	9.9%	\$206.34	\$175.52	17.6%
Other O'ahu	77.8%	72.1%	5.7%	\$346.82	\$327.83	5.8%	\$269.80	\$236.48	14.1%
O'ahu Luxury	60.9%	52.7%	8.2%	\$667.49	\$659.17	1.3%	\$406.59	\$347.55	17.0%
O'ahu Upper Upscale	81.0%	75.9%	5.0%	\$285.43	\$260.11	9.7%	\$231.14	\$197.52	17.0%
O'ahu Upscale	83.0%	79.5%	3.5%	\$205.83	\$192.90	6.7%	\$170.77	\$153.27	11.4%
O'ahu Upper Midscale	74.1%	68.0%	6.0%	\$168.35	\$153.98	9.3%	\$124.69	\$104.73	19.1%
O'ahu Midscale & Economy	79.7%	74.0%	5.7%	\$152.31	\$137.54	10.7%	\$121.41	\$101.84	19.2%
Maui County	67.8%	68.4%	-0.6%	\$617.72	\$600.48	2.9%	\$418.51	\$410.63	1.9%
Wailea	62.2%	63.5%	-1.3%	\$955.97	\$935.35	2.2%	\$594.67	\$594.39	0.0%
Lahaina/Kā'anapali/Kapalua	70.5%	70.5%	0.0%	\$548.94	\$528.89	3.8%	\$387.15	\$373.01	3.8%
Other Maui County	64.4%	65.8%	-1.4%	\$709.41	\$693.83	2.2%	\$456.68	\$456.38	0.1%
Maui County Luxury	55.5%	57.8%	-2.3%	\$1,057.74	\$1,033.37	2.4%	\$587.02	\$596.93	-1.7%
Maui County Upper Upscale & Upscale	72.7%	72.5%	0.2%	\$515.05	\$496.82	3.7%	\$374.46	\$360.41	3.9%
Island of Hawai'i	72.6%	74.8%	-2.3%	\$414.84	\$418.33	-0.8%	\$301.11	\$313.07	-3.8%
Kohala Coast	74.8%	73.3%	1.5%	\$579.21	\$627.89	-7.8%	\$432.97	\$460.21	-5.9%
Kaua'i	74.8%	77.3%	-2.5%	\$411.27	\$385.23	6.8%	\$307.68	\$297.82	3.3%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

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

Figure 6: Hawai'i Hotel Performance by Measure Year-to-Date June 2023

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2022	% Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	10,115.1	10,156.2	-0.4%	7,579.8	7,388.3	2.6%	2,877.9	2,699.4	6.6%
O'ahu	5,502.8	5,550.6	-0.9%	4,334.0	4,083.1	6.1%	1,188.4	1,025.2	15.9%
Waikiki	4,668.4	4,715.3	-1.0%	3,684.9	3,480.6	5.9%	963.3	827.6	16.4%
Maui County	2,512.3	2,511.6	0.0%	1,702.1	1,717.5	-0.9%	1,051.4	1,031.3	1.9%
Wailea	535.5	536.5	-0.2%	333.1	340.9	-2.3%	318.4	318.9	-0.1%
Lahaina/Kā'anapali/ Kapalua	1,379.0	1,378.3	0.1%	972.6	972.0	0.1%	533.9	514.1	3.8%
Island of Hawai'i	1,228.9	1,263.8	-2.8%	892.0	945.8	-5.7%	370.0	395.6	-6.5%
Kohala Coast	534.5	535.9	-0.3%	399.5	392.8	1.7%	231.4	246.6	-6.2%
Kaua'i	871.1	830.2	4.9%	651.7	641.8	1.5%	268.0	247.3	8.4%

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority

Figure 7: Hawai'i Hotel Performance Year-to-Date June 2023 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2019	Percentage Pt. Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	74.9%	80.5%	-5.5%	\$379.68	\$279.99	35.6%	\$284.51	\$225.27	26.3%
Luxury Class	60.5%	76.3%	-15.8%	\$846.77	\$562.14	50.6%	\$512.40	\$428.71	19.5%
Upper Upscale Class	78.7%	82.2%	-3.6%	\$353.48	\$277.99	27.2%	\$278.16	\$228.63	21.7%
Upscale Class	77.9%	77.8%	0.1%	\$274.82	\$210.14	30.8%	\$214.01	\$163.51	30.9%
Upper Midscale Class	73.5%	83.5%	-10.0%	\$238.92	\$161.33	48.1%	\$175.59	\$134.74	30.3%
Midscale & Economy Class	76.6%	82.4%	-5.8%	\$250.52	\$175.43	42.8%	\$191.98	\$144.53	32.8%
O'ahu	78.8%	83.3%	-4.5%	\$274.20	\$233.18	17.6%	\$215.96	\$194.19	11.2%
Waikiki	78.9%	83.5%	-4.6%	\$261.41	\$228.28	14.5%	\$206.34	\$190.68	8.2%
Other O'ahu	77.8%	81.8%	-4.0%	\$346.82	\$263.44	31.7%	\$269.80	\$215.42	25.2%
O'ahu Luxury	60.9%	71.1%	-10.2%	\$667.49	\$483.31	38.1%	\$406.59	\$343.77	18.3%
O'ahu Upper Upscale	81.0%	84.8%	-3.8%	\$285.43	\$257.23	11.0%	\$231.14	\$218.03	6.0%
O'ahu Upscale	83.0%	83.6%	-0.7%	\$205.83	\$191.67	7.4%	\$170.77	\$160.28	6.5%
O'ahu Upper Midscale	74.1%	83.9%	-9.8%	\$168.35	\$154.43	9.0%	\$124.69	\$129.55	-3.8%
O'ahu Midscale & Economy	79.7%	87.1%	-7.4%	\$152.31	\$130.47	16.7%	\$121.41	\$113.67	6.8%
Maui County	67.8%	78.5%	-10.7%	\$617.72	\$403.40	53.1%	\$418.51	\$316.65	32.2%
Wailea	62.2%	89.7%	-27.5%	\$955.97	\$613.26	55.9%	\$594.67	\$549.84	8.2%
Lahaina/Kā'anapali/Kapalua	70.5%	77.8%	-7.3%	\$548.94	\$338.38	62.2%	\$387.15	\$263.32	47.0%
Other Maui County	64.4%	79.4%	-15.0%	\$709.41	\$484.75	46.3%	\$456.68	\$384.71	18.7%
Maui County Luxury	55.5%	82.0%	-26.5%	\$1,057.74	\$661.02	60.0%	\$587.02	\$541.94	8.3%
Maui County Upper Upscale & Upscale	72.7%	78.4%	-5.7%	\$515.05	\$320.82	60.5%	\$374.46	\$251.42	48.9%
Island of Hawai'i	72.6%	76.9%	-4.3%	\$414.84	\$266.34	55.8%	\$301.11	\$204.89	47.0%
Kohala Coast	74.8%	77.6%	-2.8%	\$579.21	\$376.85	53.7%	\$432.97	\$292.28	48.1%
Kauai	74.8%	72.1%	2.7%	\$411.27	\$285.94	43.8%	\$307.68	\$206.16	49.2%

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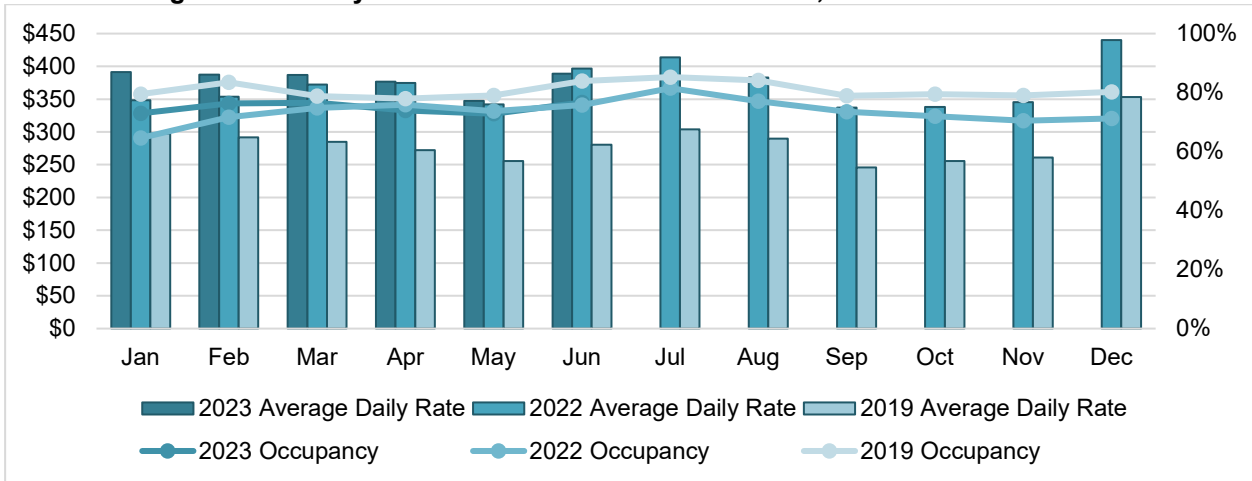
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date June 2023 vs. 2019

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2019	% Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	10,115.1	9,795.0	3.3%	7,579.8	7,880.9	-3.8%	2,877.9	2,206.5	30.4%
O'ahu	5,502.8	5,499.4	0.1%	4,334.0	4,579.8	-5.4%	1,188.4	1,067.9	11.3%
Waikiki	4,668.4	4,718.7	-1.1%	3,684.9	3,941.5	-6.5%	963.3	899.8	7.1%
Maui County	2,512.3	2,303.4	9.1%	1,702.1	1,808.1	-5.9%	1,051.4	729.4	44.2%
Wailea	535.5	397.1	34.8%	333.1	356.1	-6.4%	318.4	218.4	45.8%
Lahaina/Kā'anapali/ Kapalua	1,379.0	1,291.4	6.8%	972.6	1,005.0	-3.2%	533.9	340.1	57.0%
Island of Hawai'i	1,228.9	1,171.6	4.9%	892.0	901.3	-1.0%	370.0	240.0	54.1%
Kohala Coast	534.5	543.0	-1.6%	399.5	420.6	-5.0%	231.4	158.5	46.0%
Kauai	871.1	820.6	6.2%	651.7	591.7	10.1%	268.0	169.2	58.4%

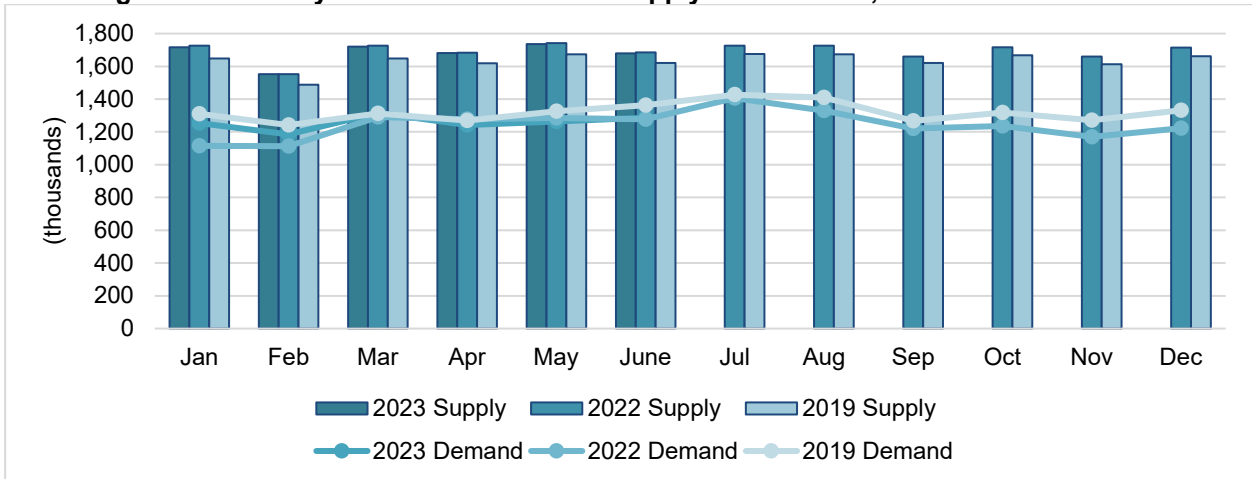
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2023 vs. 2022 vs. 2019



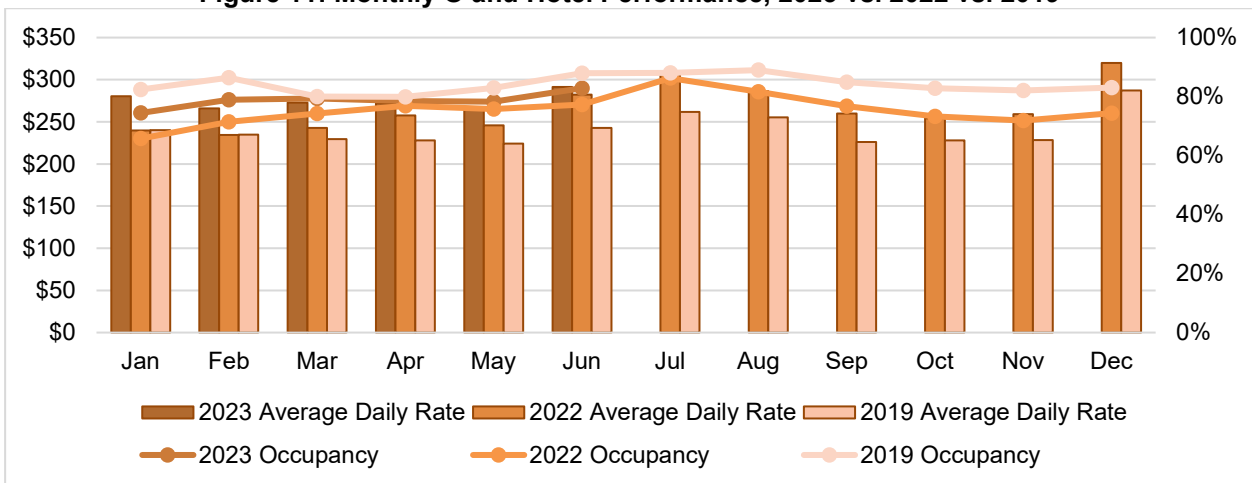
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



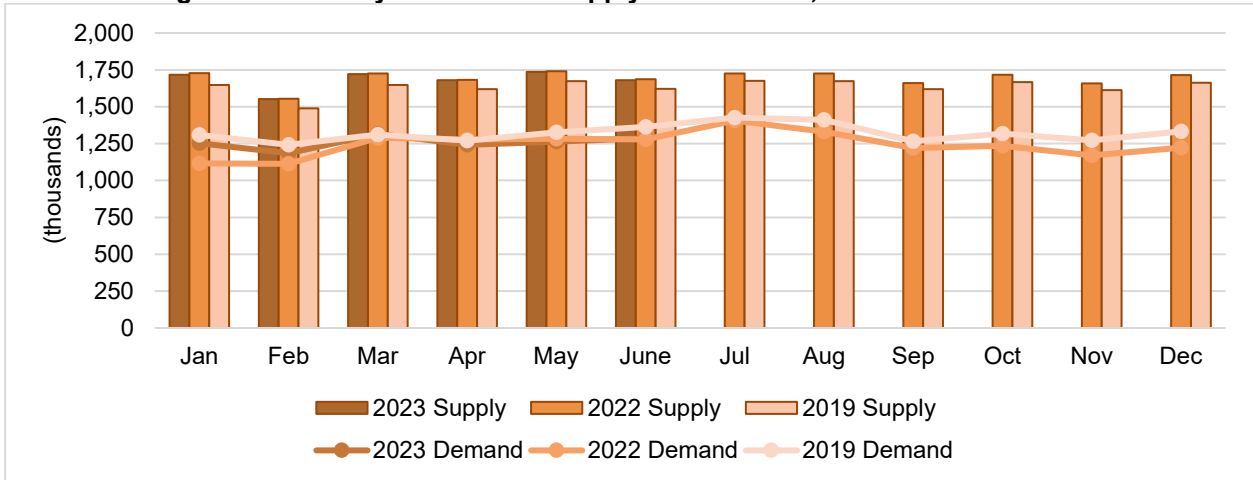
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Figure 11: Monthly O'ahu Hotel Performance, 2023 vs. 2022 vs. 2019



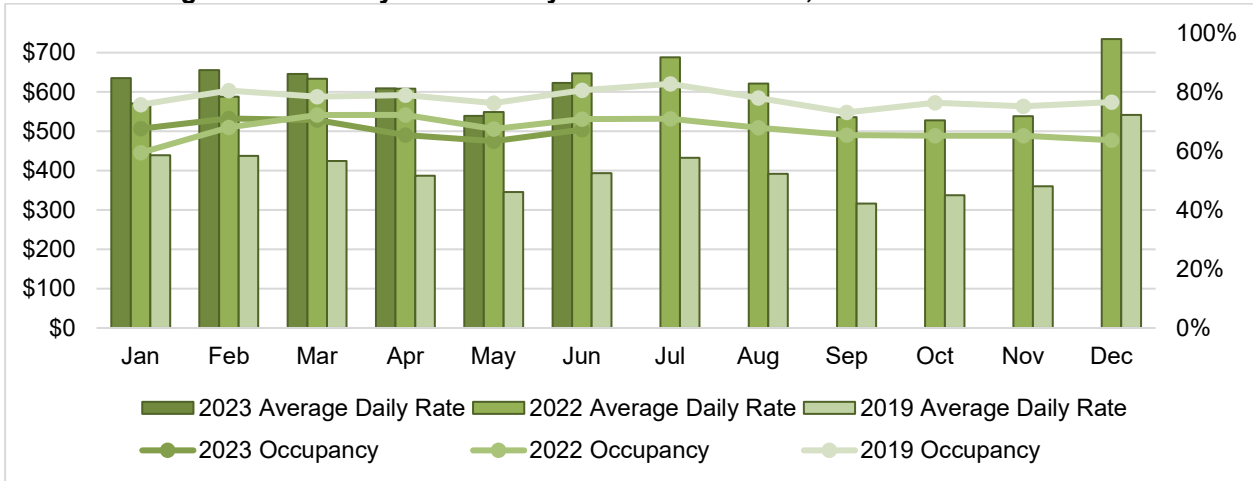
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



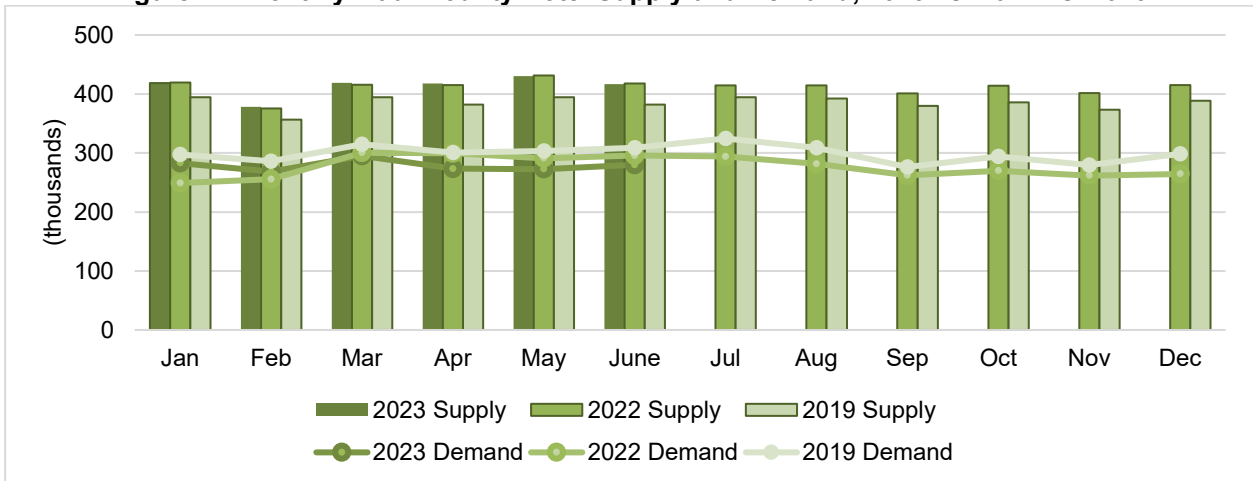
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Figure 13: Monthly Maui County Hotel Performance, 2023 vs. 2022 vs. 2019



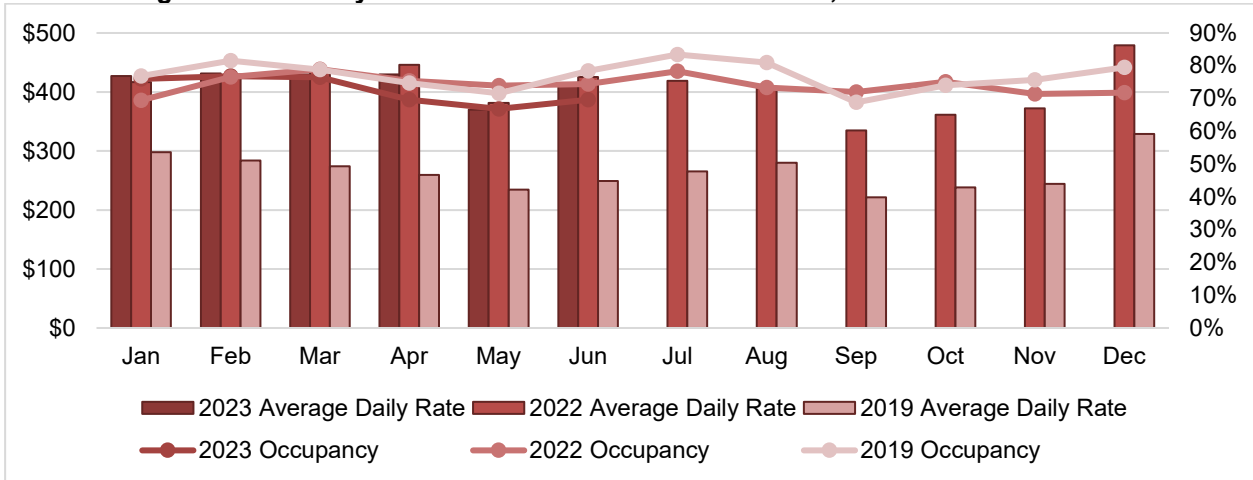
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



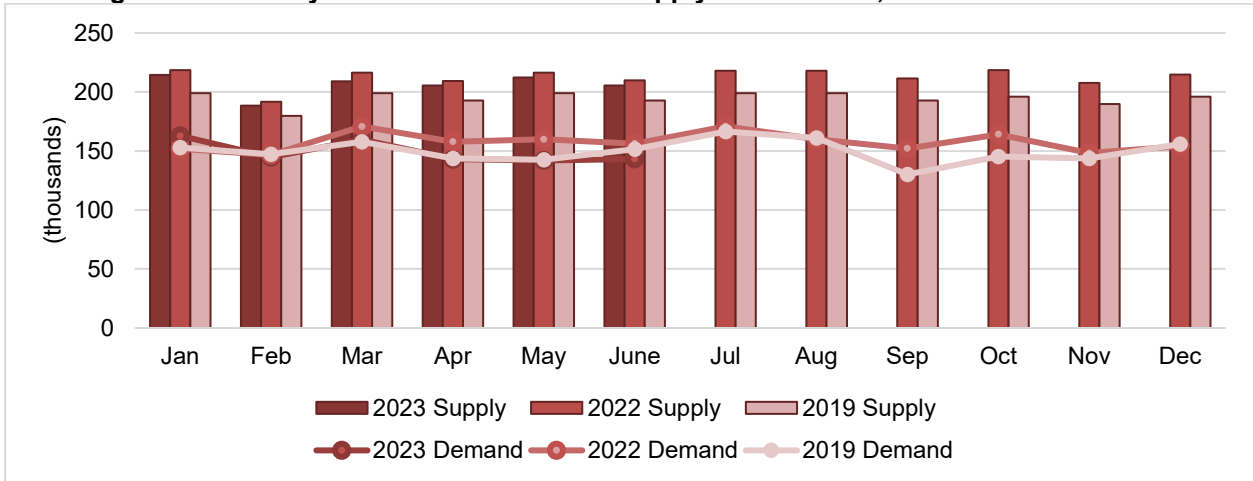
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2023 vs. 2022 vs. 2019



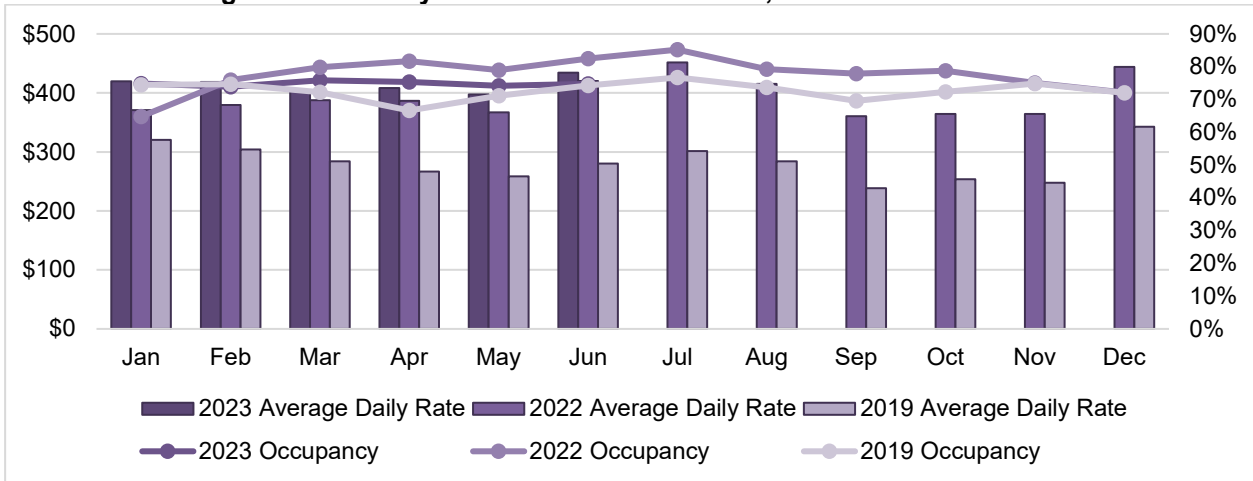
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



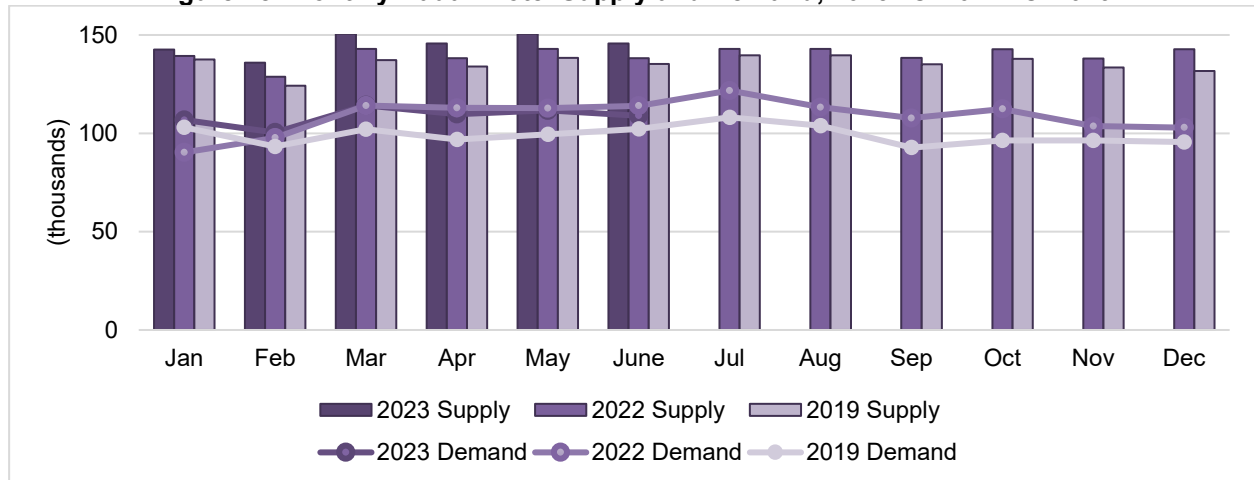
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Figure 17: Monthly Kaua'i Hotel Performance, 2023 vs. 2022 vs. 2019



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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



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Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD June 2023

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$284.51	7.0%
2	New York, NY	\$204.93	23.2%
3	Miami, FL	\$186.81	-7.1%
4	Orlando, FL	\$156.64	11.4%
5	San Diego, CA	\$149.29	8.6%

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Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD June 2023

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$379.68	3.9%
2	New York, NY	\$264.01	8.7%
3	Miami, FL	\$248.99	-5.8%
4	San Francisco/San Mateo, CA	\$226.46	12.5%
5	Boston, MA	\$211.04	7.7%

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Figure 21: Top 5 U.S. Markets – Occupancy – YTD June 2023

Rank	Destination	Occupancy	Percentage Pt. Change
1	Las Vegas, NV	78.0%	5.2%
2	New York, NY	77.6%	9.1%
3	Orlando, FL	76.4%	2.3%
4	Tampa, FL	75.3%	0.0%
5	Miami, FL	75.0%	-1.1%
6	Hawaiian Islands	74.9%	2.2%

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Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD June 2023

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$582.67	39.3%
2	Maldives	\$431.46	-4.7%
3	Maui County	\$418.51	1.9%
4	Aruba	\$322.88	33.2%
5	Kaua'i	\$307.68	3.3%
6	Hawai'i Island	\$301.11	-3.8%
7	Cabo San Lucas+	\$264.52	6.4%
8	Puerto Rico	\$237.33	14.7%
9	O'ahu	\$215.96	16.9%
10	Cancun+	\$203.33	13.9%
11	Fiji	\$164.36	53.1%
12	Costa Rica	\$162.58	23.0%
13	Puerto Vallarta+	\$145.21	31.7%
14	Phuket	\$108.76	134.8%
15	Bali	\$83.18	190.2%

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Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD June 2023

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$792.26	17.2%
2	Maldives	\$664.16	-2.0%
3	Maui County	\$617.72	2.9%
4	Aruba	\$444.13	14.3%
5	Cabo San Lucas+	\$426.33	4.5%
6	Hawai'i Island	\$414.84	-0.8%
7	Kaua'i	\$411.27	6.8%
8	Puerto Rico	\$307.35	5.4%
9	O'ahu	\$274.20	9.2%
10	Cancun+	\$271.82	10.9%
11	Costa Rica	\$238.34	9.1%
12	Fiji	\$218.23	20.2%
13	Puerto Vallarta+	\$185.92	25.7%
14	Phuket	\$156.19	34.6%
15	Bali	\$127.52	52.0%

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Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD June 2023

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	78.8%	5.2%
2	Puerto Vallarta+	78.1%	3.6%
3	Puerto Rico	77.2%	6.2%
4	Fiji	75.3%	16.2%
5	Kaua'i	74.8%	-2.5%
6	Cancun+	74.8%	1.9%
7	French Polynesia	73.5%	11.7%
8	Aruba	72.7%	10.3%
9	Hawai'i Island	72.6%	-2.3%
10	Phuket	69.6%	29.7%
11	Costa Rica	68.2%	7.7%
12	Maui County	67.8%	-0.6%
13	Bali	65.2%	31.0%
14	Maldives	65.0%	-1.9%
15	Cabo San Lucas+	62.0%	1.1%

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