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. 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/Ka‘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). Waikiki 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.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 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 Kuʻu Home – care for our beloved home. For more information about HTA, visit www.hawaiitourismauthority.org or follow @HawaiiHTA on Facebook, Instagram, and Twitter.
## Figure 1: Hawai‘i Hotel Performance June 2023

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<thead>
<tr>
<th>Class</th>
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<th>2022</th>
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<th>2022</th>
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</tr>
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<td>$624.03</td>
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<td>$369.63</td>
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</table>

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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 June 2023

<table>
<thead>
<tr>
<th></th>
<th>Supply (room nights, thousands)</th>
<th>% Change</th>
<th>Demand (room nights, thousands)</th>
<th>% Change</th>
<th>Revenue ($millions)</th>
<th>% Change</th>
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<td>1,287.7</td>
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<td>O‘ahu</td>
<td>912.1</td>
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<td>755.7</td>
<td>6.2%</td>
<td>220.3</td>
<td>9.6%</td>
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<td>Waikiki</td>
<td>773.8</td>
<td>-1.0%</td>
<td>645.3</td>
<td>6.5%</td>
<td>179.9</td>
<td>10.4%</td>
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<td>Maui County</td>
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<td>59.0</td>
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Source: STR, Inc. © Copyright 2023 Hawai‘i Tourism Authority
### Figure 3: Hawai’i Hotel Performance June 2023 vs. 2019

<table>
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<tr>
<th>Class</th>
<th>Occupancy % 2023</th>
<th>Percentage Pt. Change</th>
<th>Average Daily Rate 2023</th>
<th>% Change</th>
<th>RevPAR 2023</th>
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<tr>
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<td>31.6%</td>
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<td>Midscale &amp; Economy Class</td>
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<td>$623.00</td>
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<td>Lahaina/Kaanapali/Kapalua</td>
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<tr>
<td>Other Maui County</td>
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<tr>
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<td>-8.7%</td>
<td>$410.39</td>
<td>64.8%</td>
<td>$285.96</td>
<td>46.5%</td>
</tr>
<tr>
<td>Kaua’i</td>
<td>72.8%</td>
<td>-7.1%</td>
<td>$571.58</td>
<td>62.9%</td>
<td>$415.94</td>
<td>48.5%</td>
</tr>
<tr>
<td></td>
<td>74.8%</td>
<td>0.5%</td>
<td>$434.13</td>
<td>54.8%</td>
<td>$324.70</td>
<td>55.8%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Supply (room nights, thousands)</th>
<th>Demand (room nights, thousands)</th>
<th>Revenue ($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2023</td>
<td>2019</td>
<td>% Change</td>
</tr>
<tr>
<td>State of Hawai’i</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>O’ahu</td>
<td>1,679.7</td>
<td>1,622.8</td>
<td>3.5%</td>
</tr>
<tr>
<td>Waikiki</td>
<td>912.1</td>
<td>910.4</td>
<td>0.2%</td>
</tr>
<tr>
<td>Maui County</td>
<td>416.5</td>
<td>381.8</td>
<td>9.1%</td>
</tr>
<tr>
<td>Wailea</td>
<td>88.7</td>
<td>65.8</td>
<td>34.8%</td>
</tr>
<tr>
<td>Lahaina/Kaanapali/Kapalua</td>
<td>228.6</td>
<td>214.1</td>
<td>6.8%</td>
</tr>
<tr>
<td>Island of Hawai’i</td>
<td>205.5</td>
<td>194.2</td>
<td>5.8%</td>
</tr>
<tr>
<td>Kaua’i</td>
<td>88.6</td>
<td>90.0</td>
<td>-1.6%</td>
</tr>
</tbody>
</table>

Source: STR, Inc. © Copyright 2023 Hawai’i Tourism Authority
Figure 5: Hawai‘i Hotel Performance Year-to-Date June 2023

<table>
<thead>
<tr>
<th></th>
<th>Occupancy %</th>
<th>Average Daily Rate</th>
<th>RevPAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2023</td>
<td>2022</td>
<td>% Change</td>
</tr>
<tr>
<td>State of Hawai‘i</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxury Class</td>
<td>74.9%</td>
<td>72.7%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Upper Upscale Class</td>
<td>60.5%</td>
<td>60.0%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Upscale Class</td>
<td>78.7%</td>
<td>75.6%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Upper Midscale Class</td>
<td>77.9%</td>
<td>75.9%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Midscale &amp; Economy Class</td>
<td>73.5%</td>
<td>72.4%</td>
<td>1.1%</td>
</tr>
<tr>
<td></td>
<td>76.6%</td>
<td>73.8%</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Occupancy %</th>
<th>Average Daily Rate</th>
<th>RevPAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>O‘ahu</td>
<td>78.8%</td>
<td>73.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Waikiki</td>
<td>78.9%</td>
<td>73.8%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Other O‘ahu</td>
<td>77.8%</td>
<td>72.1%</td>
<td>5.7%</td>
</tr>
<tr>
<td>O‘ahu Luxury</td>
<td>60.9%</td>
<td>52.7%</td>
<td>8.2%</td>
</tr>
<tr>
<td>O‘ahu Upper Upscale</td>
<td>81.0%</td>
<td>75.9%</td>
<td>5.0%</td>
</tr>
<tr>
<td>O‘ahu Upscale</td>
<td>83.0%</td>
<td>79.5%</td>
<td>3.5%</td>
</tr>
<tr>
<td>O‘ahu Upper Midscale</td>
<td>74.1%</td>
<td>68.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>O‘ahu Midscale &amp; Economy</td>
<td>79.7%</td>
<td>74.0%</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Maui County</th>
<th>Occupancy %</th>
<th>Average Daily Rate</th>
<th>RevPAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2023</td>
<td>2022</td>
<td>% Change</td>
</tr>
<tr>
<td></td>
<td>67.8%</td>
<td>68.4%</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Wailea</td>
<td>62.2%</td>
<td>63.5%</td>
<td>-1.3%</td>
</tr>
<tr>
<td>Lahaina/Kaanapali/Kapalua</td>
<td>70.5%</td>
<td>70.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Other Maui County</td>
<td>64.4%</td>
<td>65.8%</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Maui County Luxury</td>
<td>55.5%</td>
<td>57.8%</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Maui County Upper</td>
<td>72.7%</td>
<td>72.5%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Upscale &amp; Upscale</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Island of Hawai‘i</th>
<th>Occupancy %</th>
<th>Average Daily Rate</th>
<th>RevPAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2023</td>
<td>2022</td>
<td>% Change</td>
</tr>
<tr>
<td></td>
<td>72.6%</td>
<td>74.8%</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Kohala Coast</td>
<td>74.8%</td>
<td>73.3%</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Kaua‘i</th>
<th>Occupancy %</th>
<th>Average Daily Rate</th>
<th>RevPAR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2023</td>
<td>2022</td>
<td>% Change</td>
</tr>
<tr>
<td></td>
<td>74.8%</td>
<td>77.3%</td>
<td>-2.5%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Supply (room nights, thousands)</th>
<th>Demand (room nights, thousands)</th>
<th>Revenue ($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>% Change</td>
<td>2023</td>
</tr>
<tr>
<td>State of Hawai‘i</td>
<td>10,115.1</td>
<td>-0.4%</td>
</tr>
<tr>
<td>O‘ahu</td>
<td>5,502.8</td>
<td>0.9%</td>
</tr>
<tr>
<td>Waikiki</td>
<td>4,668.4</td>
<td>0.3%</td>
</tr>
<tr>
<td>Maui County</td>
<td>2,512.3</td>
<td>-2.0%</td>
</tr>
<tr>
<td>Wailea</td>
<td>535.5</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Lahaina/Kaanapali/Kapalua</td>
<td>1,379.0</td>
<td>0.1%</td>
</tr>
<tr>
<td>Island of Hawai‘i</td>
<td>1,228.9</td>
<td>-2.8%</td>
</tr>
<tr>
<td>Kohala Coast</td>
<td>534.5</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Kaua‘i</td>
<td>871.1</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

Source: STR, Inc. © Copyright 2023 Hawai‘i Tourism Authority
Figure 7: Hawaiʻi Hotel Performance Year-to-Date June 2023 vs. 2019

<table>
<thead>
<tr>
<th>Historic Class</th>
<th>2023</th>
<th>2019</th>
<th>Percentage Pt. Change</th>
<th>Average Daily Rate</th>
<th>% Change</th>
<th>RevPAR</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Hawaiʻi</td>
<td>74.9%</td>
<td>80.5%</td>
<td>-5.5%</td>
<td>$379.68</td>
<td>35.6%</td>
<td>$284.51</td>
<td>26.3%</td>
</tr>
<tr>
<td>Luxury Class</td>
<td>60.5%</td>
<td>76.3%</td>
<td>-15.8%</td>
<td>$846.77</td>
<td>50.6%</td>
<td>$512.40</td>
<td>19.5%</td>
</tr>
<tr>
<td>Upper Upscale Class</td>
<td>78.7%</td>
<td>82.2%</td>
<td>-3.6%</td>
<td>$353.48</td>
<td>27.2%</td>
<td>$278.16</td>
<td>21.7%</td>
</tr>
<tr>
<td>Upscale Class</td>
<td>77.9%</td>
<td>77.8%</td>
<td>0.1%</td>
<td>$274.82</td>
<td>30.8%</td>
<td>$214.01</td>
<td>30.9%</td>
</tr>
<tr>
<td>Upper Midscale Class</td>
<td>73.5%</td>
<td>83.5%</td>
<td>-10.0%</td>
<td>$238.92</td>
<td>48.1%</td>
<td>$175.59</td>
<td>30.3%</td>
</tr>
<tr>
<td>Midscale &amp; Economy Class</td>
<td>76.6%</td>
<td>82.4%</td>
<td>-5.8%</td>
<td>$250.52</td>
<td>42.8%</td>
<td>$191.98</td>
<td>32.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Island of Hawaiʻi</th>
<th>2023</th>
<th>2019</th>
<th>% Change</th>
<th>Supply (room nights, thousands)</th>
<th>% Change</th>
<th>Demand (room nights, thousands)</th>
<th>% Change</th>
<th>Revenue ($Millions)</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Hawaiʻi</td>
<td>10,115.1</td>
<td>9,795.0</td>
<td>3.3%</td>
<td>7,579.8</td>
<td>-3.8%</td>
<td>2,877.9</td>
<td>30.4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oʻahu</td>
<td>5,502.8</td>
<td>5,499.4</td>
<td>0.1%</td>
<td>4,334.0</td>
<td>-5.4%</td>
<td>1,184.8</td>
<td>11.3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waikīkī</td>
<td>4,668.4</td>
<td>4,718.7</td>
<td>-1.1%</td>
<td>3,684.9</td>
<td>-6.5%</td>
<td>963.3</td>
<td>7.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maui County</td>
<td>2,512.3</td>
<td>2,303.4</td>
<td>9.1%</td>
<td>1,702.1</td>
<td>-5.9%</td>
<td>1,051.4</td>
<td>44.2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wailea</td>
<td>535.5</td>
<td>397.1</td>
<td>34.8%</td>
<td>333.1</td>
<td>-6.4%</td>
<td>318.4</td>
<td>45.8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lahaina/Kā'anapali/Kapalua</td>
<td>1,379.0</td>
<td>1,291.4</td>
<td>6.8%</td>
<td>972.6</td>
<td>-3.2%</td>
<td>533.9</td>
<td>57.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Island of Hawaiʻi</td>
<td>1,228.9</td>
<td>1,171.6</td>
<td>4.9%</td>
<td>892.0</td>
<td>-1.0%</td>
<td>370.0</td>
<td>54.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kohala Coast</td>
<td>534.5</td>
<td>543.0</td>
<td>-1.6%</td>
<td>399.5</td>
<td>-5.0%</td>
<td>231.4</td>
<td>46.0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kauaʻi</td>
<td>871.1</td>
<td>820.6</td>
<td>6.2%</td>
<td>651.7</td>
<td>10.1%</td>
<td>268.0</td>
<td>58.4%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: STR, Inc. © Copyright 2023 Hawaiʻi 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 8: Hawaiʻi Hotel Performance by Measure Year-to-Date June 2023 vs. 2019

Source: STR, Inc. © Copyright 2023 Hawaiʻi Tourism Authority
Figure 9: Monthly State of Hawai'i Hotel Performance, 2023 vs. 2022 vs. 2019

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

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

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

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

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority.
Figure 12: Monthly O'ahu Hotel Supply and Demand, 2023 vs. 2022 vs. 2019

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

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

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

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

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority.
Figure 15: Monthly Island of Hawai‘i Hotel Performance, 2023 vs. 2022 vs. 2019

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

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

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

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

Source: STR, Inc. © Copyright 2023 Hawai‘i Tourism Authority.
**Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019**

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

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Destination</th>
<th>Revenue Per Available Room</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hawaiian Islands</td>
<td>$284.51</td>
<td>7.0%</td>
</tr>
<tr>
<td>2</td>
<td>New York, NY</td>
<td>$204.93</td>
<td>23.2%</td>
</tr>
<tr>
<td>3</td>
<td>Miami, FL</td>
<td>$186.81</td>
<td>-7.1%</td>
</tr>
<tr>
<td>4</td>
<td>Orlando, FL</td>
<td>$156.64</td>
<td>11.4%</td>
</tr>
<tr>
<td>5</td>
<td>San Diego, CA</td>
<td>$149.29</td>
<td>8.6%</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

Source: STR, Inc. © Copyright 2023 Hawai'i Tourism Authority
### Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD June 2023

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

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

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

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

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

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