



March 2024 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported slightly lower occupancy, average daily rate (ADR) and revenue per available room (RevPAR) in March 2024 compared to March 2023. When compared to pre-pandemic March 2019, statewide ADR and RevPAR were higher in March 2024 but occupancy was lower.

Statewide RevPAR in March 2024 was \$287 (-3.4%), with ADR at \$384 (-0.9%) and occupancy of 74.6 percent (-1.9 percentage points) compared to March 2023 (Figure 1). Compared with March 2019, RevPAR was 27.8 percent higher, driven by higher ADR (+35.0%) which offset lower occupancy (-4.2 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 March 2024, the survey included 171 properties representing 48,270 rooms, or 86.2 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 \$497.5 million (-2.9% vs. 2023, +32.3% vs. 2019) in March 2024. Room demand was 1.3 million room nights (-2.0% vs. 2023, -2.0% vs. 2019) and room supply was 1.7 million room nights (+0.5% vs. 2023, +3.6% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$539 (+1.8% vs. 2023, +22.3% vs. 2019), with ADR at \$876 (-1.3% vs. 2023, +50.1% vs. 2019) and occupancy of 61.5 percent (+1.9 percentage points vs. 2023, -14.0 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$175 (-3.6% vs. 2023, +20.2% vs. 2019) with ADR at \$240 (-1.5% vs. 2023, +33.6% vs. 2019) and occupancy of 73.0 percent (-1.6 percentage points vs. 2023, -8.2 percentage points vs. 2019).

Maui County hotels continued to be impacted by the August 8, 2023, wildfires, but still led the counties in March 2024 RevPAR due to comparatively higher ADR. Maui County hotels achieved RevPAR of \$401 (-11.9% vs. 2023, +20.5% vs. 2019), with ADR at \$581 (-10.1% vs. 2023, +36.8% vs. 2019) and occupancy of 69.1 percent (-1.4 percentage points vs. 2023, -9.3 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$544 (-0.4% vs. 2023, -6.4% vs. 2019), with ADR at \$811 (-6.8% vs. 2023, +26.4% vs. 2019) and occupancy of 67.1 percent (+4.3 percentage points vs. 2023, -23.5 percentage points vs. 2019). In March, hotels in the Lahaina/Kā'anapali/Kapalua region were occupied by a mix of displaced Lahaina residents impacted by the fires, relief workers, and visitors. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$341 (-19.6% vs. 2023, +23.6% vs. 2019), ADR at \$479 (-15.7% vs. 2023, +34.7% vs. 2019) and occupancy of 71.1 percent (-3.5 percentage points vs. 2023, -6.4 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$326 (+6.5% vs. 2023, +58.7% vs. 2019), with ADR at \$444 (+10.0% vs. 2023, +56.3% vs. 2019) and occupancy of 73.3 percent (-2.4 percentage points vs. 2023, +1.1 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$321 (-1.1% vs. 2023, +48.8% vs. 2019), with ADR at \$475 (+10.5% vs. 2023, +73.3% vs. 2019), and occupancy of 67.7 percent (-7.9 percentage points vs. 2023, -11.1 percentage points vs. 2019). Kohala Coast hotels earned

RevPAR of \$485 (+2.3% vs. 2023, +57.2% vs. 2019), with ADR at \$648 (+6.1% vs. 2023, +68.1% vs. 2019), and occupancy of 74.9 percent (-2.8 percentage points vs. 2023, -5.2 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$224 (+3.2% vs. 2023, +21.8% vs. 2019) in March, ADR at \$284 (+4.4% vs. 2023, +23.8% vs. 2019) and occupancy of 78.7 percent (-0.9 percentage points vs. 2023, -1.3 percentage points vs. 2019). Waikīkī hotels earned RevPAR of \$213 (+3.2% vs. 2023, +19.0% vs. 2019), with ADR at \$268 (+3.9% vs. 2023, +20.1% vs. 2019) and occupancy of 79.3 percent (-0.6 percentage points vs. 2023, -0.8 percentage points vs. 2019).

First Quarter 2024

In the first quarter of 2024, Hawai'i's hotels earned \$289 in RevPAR (-0.9% vs. 2023, +23.4% vs. 2019), with ADR at \$378 (-2.7% vs. 2023, +29.8% vs. 2019) and occupancy of 76.5 percent (+1.4 percentage points vs. 2023, -4.0 percentage points vs. 2019).

Total statewide hotel revenues for the first quarter of 2024 were \$1.5 billion (-0.6% vs. 2023, +27.4% vs. 2019). Room supply was 5.0 million room nights (+0.3% vs. 2023, +3.2% vs. 2019), and room demand was 3.8 million room nights (+2.2% vs. 2023, -1.9% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest first quarter 2024 RevPAR at \$289 (-0.9%). Miami, Florida was second at \$226 (+2.8%), followed by Las Vegas, Nevada at \$186 (+15.3%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in first quarter 2024 ADR at \$378 (-2.7%), followed by Miami, Florida at \$276 (-0.4%) and San Francisco/San Mateo, California at \$239 (-0.2%) (Figure 20).

Miami, Florida topped the country in occupancy at 81.9 percent (+2.6 percentage points), followed by Las Vegas, Nevada at 78.3 percent (-0.4 percentage points) and Orlando, Florida at 77.4% (-1.6 percentage points). The Hawaiian Islands ranked fifth at 76.5 percent (+1.4 percentage points) (Figure 21).

Comparison to International Markets

Hotels in the Maldives ranked highest for first quarter 2024 RevPAR for international "sun and sea" destinations at \$563 (-0.1%), followed by French Polynesia (\$448, -6.5%). Maui County (\$401, -10.5%), Hawai'i Island (\$322, +0.6%), Kaua'i (\$322, +4.2%), and O'ahu (\$228, +7.9%) ranked fourth, fifth, sixth, and tenth, respectively (Figure 22).

Hotels in the Maldives led in first quarter 2024 ADR at \$746 (+0.0%), followed by French Polynesia (\$707, +4.1%) and Maui County (\$561, -12.8%). Hawai'i Island (\$460, +8.0%), Kaua'i (\$433, +4.9%), and O'ahu (\$284, +4.1%) ranked fifth, seventh, and eleventh, respectively (Figure 23).

Puerto Vallarta led in occupancy for "sun and sea" destinations at 82.3 percent (-1.4 percentage points), followed by Aruba (81.7%, +9.6 percentage points) and Cancun (80.8%, +2.3 percentage points). O'ahu (80.5%, +2.9 percentage points), Kaua'i (74.3%, -0.5 percentage points), Maui County (71.5%, +1.8 percentage points), and Hawai'i Island (70.2%, -5.2 percentage points) ranked fourth, ninth, tenth, and eleventh, 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 March 2024, the survey included 171 properties representing 48,270 rooms, or 86.2 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The March survey included 83 properties on O'ahu, representing 29,560 rooms (95.4%); 42 properties in the County of Maui, representing 9,529 rooms (71.2%); 24 properties on the island of Hawai'i, representing 5,518 rooms (81.1%); and 22 properties on Kaua'i, representing 3,663 rooms (76.4%).

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.hawaii tourism authority.org or follow @HawaiiHTA on [Facebook](#), [Instagram](#), and [Twitter](#).

Figure 1: Hawai'i Hotel Performance March 2024

	Occupancy %			Average Daily Rate			RevPAR		
	2024	2023	Percentage Pt. Change	2024	2023	% Change	2024	2023	% Change
State of Hawai'i	74.6%	76.5%	-1.9%	\$384.30	\$387.72	-0.9%	\$286.67	\$296.69	-3.4%
Luxury Class	61.5%	59.6%	1.9%	\$876.12	\$887.47	-1.3%	\$538.71	\$528.99	1.8%
Upper Upscale Class	78.5%	82.8%	-4.3%	\$350.60	\$357.54	-1.9%	\$275.04	\$295.97	-7.1%
Upscale Class	79.1%	77.7%	1.4%	\$266.70	\$279.95	-4.7%	\$211.04	\$217.54	-3.0%
Upper Midscale Class	70.7%	75.5%	-4.8%	\$232.71	\$238.41	-2.4%	\$164.64	\$180.10	-8.6%
Midscale & Economy Class	73.0%	74.5%	-1.6%	\$240.00	\$243.73	-1.5%	\$175.11	\$181.64	-3.6%
O'ahu	78.7%	79.6%	-0.9%	\$284.06	\$271.97	4.4%	\$223.53	\$216.53	3.2%
Waikiki	79.3%	79.9%	-0.6%	\$268.43	\$258.24	3.9%	\$212.81	\$206.28	3.2%
Other O'ahu	75.7%	78.1%	-2.5%	\$368.75	\$350.55	5.2%	\$278.96	\$273.89	1.9%
O'ahu Luxury	58.8%	60.2%	-1.4%	\$710.51	\$665.56	6.8%	\$417.98	\$400.80	4.3%
O'ahu Upper Upscale	81.6%	84.0%	-2.4%	\$298.14	\$282.96	5.4%	\$243.22	\$237.55	2.4%
O'ahu Upscale	85.7%	82.9%	2.8%	\$209.49	\$206.92	1.2%	\$179.51	\$171.52	4.7%
O'ahu Upper Midscale	74.2%	73.5%	0.8%	\$171.41	\$171.14	0.2%	\$127.26	\$125.74	1.2%
O'ahu Midscale & Economy	74.8%	74.8%	0.0%	\$153.81	\$152.61	0.8%	\$115.06	\$114.17	0.8%
Maui County	69.1%	70.5%	-1.4%	\$580.83	\$646.17	-10.1%	\$401.19	\$455.49	-11.9%
Wailea	67.1%	62.8%	4.3%	\$811.03	\$870.03	-6.8%	\$544.43	\$546.70	-0.4%
Lahaina/Kā'anapali/Kapalua	71.1%	74.6%	-3.5%	\$478.65	\$567.74	-15.7%	\$340.54	\$423.56	-19.6%
Other Maui County	66.7%	65.5%	1.1%	\$708.12	\$754.42	-6.1%	\$471.98	\$494.20	-4.5%
Maui County Luxury	57.9%	55.1%	2.8%	\$1,015.91	\$1,159.80	-12.4%	\$587.99	\$638.87	-8.0%
Maui County Upper Upscale & Upscale	73.3%	76.1%	-2.8%	\$458.25	\$526.03	-12.9%	\$336.04	\$400.49	-16.1%
Island of Hawai'i	67.7%	75.6%	-7.9%	\$474.91	\$429.90	10.5%	\$321.41	\$324.90	-1.1%
Kohala Coast	74.9%	77.7%	-2.8%	\$647.85	\$610.38	6.1%	\$485.18	\$474.34	2.3%
Kauai	73.3%	75.7%	-2.4%	\$444.30	\$403.98	10.0%	\$325.84	\$305.82	6.5%

Source: STR, Inc. © Copyright 2024 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 March 2024

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2024	2023	% Change	2024	2023	% Change	2024	2023	% Change
State of Hawai'i	1,735.4	1,726.8	0.5%	1,294.5	1,321.4	-2.0%	497.5	512.3	-2.9%
O'ahu	961.0	942.6	2.0%	756.2	750.4	0.8%	214.8	204.1	5.3%
Waikiki	805.3	799.6	0.7%	638.4	638.7	0.0%	171.4	164.9	3.9%
Maui County	415.0	431.1	-3.7%	286.7	303.9	-5.7%	166.5	196.3	-15.2%
Wailea	76.2	76.0	0.4%	51.2	47.7	7.2%	41.5	41.5	0.0%
Lahaina/Kā'anapali/ Kapalua	223.5	236.2	-5.4%	159.0	176.2	-9.8%	76.1	100.0	-23.9%
Island of Hawai'i	210.8	203.5	3.6%	142.7	153.8	-7.2%	67.8	66.1	2.5%
Kohala Coast	91.6	91.5	0.0%	68.6	71.1	-3.6%	44.4	43.4	2.3%
Kauai	148.6	149.7	-0.8%	109.0	113.4	-3.9%	48.4	45.8	5.7%

Source: STR, Inc. © Copyright 2024 Hawai'i Tourism Authority

Figure 3: Hawai'i Hotel Performance March 2024 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2024	2019	Pt. Change	2024	2019	% Change	2024	2019	% Change
State of Hawai'i	74.6%	78.8%	-4.2%	\$384.30	\$284.63	35.0%	\$286.67	\$224.39	27.8%
Luxury Class	61.5%	75.5%	-14.0%	\$876.12	\$583.55	50.1%	\$538.71	\$440.58	22.3%
Upper Upscale Class	78.5%	81.4%	-2.9%	\$350.60	\$274.93	27.5%	\$275.04	\$223.75	22.9%
Upscale Class	79.1%	75.0%	4.2%	\$266.70	\$216.06	23.4%	\$211.04	\$161.95	30.3%
Upper Midscale Class	70.7%	80.3%	-9.6%	\$232.71	\$162.57	43.1%	\$164.64	\$130.57	26.1%
Midscale & Economy Class	73.0%	81.1%	-8.2%	\$240.00	\$179.58	33.6%	\$175.11	\$145.73	20.2%
O'ahu	78.7%	80.0%	-1.3%	\$284.06	\$229.49	23.8%	\$223.53	\$183.58	21.8%
Waikiki	79.3%	80.0%	-0.8%	\$268.43	\$223.42	20.1%	\$212.81	\$178.83	19.0%
Other O'ahu	75.7%	79.7%	-4.1%	\$368.75	\$266.30	38.5%	\$278.96	\$212.30	31.4%
O'ahu Luxury	58.8%	69.3%	-10.5%	\$710.51	\$478.41	48.5%	\$417.98	\$331.49	26.1%
O'ahu Upper Upscale	81.6%	82.0%	-0.4%	\$298.14	\$249.73	19.4%	\$243.22	\$204.77	18.8%
O'ahu Upscale	85.7%	78.3%	7.4%	\$209.49	\$189.79	10.4%	\$179.51	\$148.59	20.8%
O'ahu Upper Midscale	74.2%	80.4%	-6.2%	\$171.41	\$154.27	11.1%	\$127.26	\$124.07	2.6%
O'ahu Midscale & Economy	74.8%	84.6%	-9.8%	\$153.81	\$130.88	17.5%	\$115.06	\$110.78	3.9%
Maui County	69.1%	78.4%	-9.3%	\$580.83	\$424.51	36.8%	\$401.19	\$332.89	20.5%
Wailea	67.1%	90.6%	-23.5%	\$811.03	\$641.76	26.4%	\$544.43	\$581.66	-6.4%
Lahaina/Kā'anapali/Kapalua	71.1%	77.6%	-6.4%	\$478.65	\$355.22	34.7%	\$340.54	\$275.57	23.6%
Other Maui County	66.7%	79.5%	-12.8%	\$708.12	\$510.81	38.6%	\$471.98	\$406.05	16.2%
Maui County Luxury	57.9%	81.5%	-23.7%	\$1,015.91	\$696.61	45.8%	\$587.99	\$568.07	3.5%
Maui County Upper Upscale & Upscale	73.3%	78.2%	-4.9%	\$458.25	\$335.03	36.8%	\$336.04	\$262.15	28.2%
Island of Hawai'i	67.7%	78.8%	-11.1%	\$474.91	\$274.06	73.3%	\$321.41	\$215.97	48.8%
Kohala Coast	74.9%	80.1%	-5.2%	\$647.85	\$385.49	68.1%	\$485.18	\$308.62	57.2%
Kaua'i	73.3%	72.2%	1.1%	\$444.30	\$284.24	56.3%	\$325.84	\$205.28	58.7%

Source: STR, Inc. © Copyright 2024 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 March 2024 vs. 2019

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2024	2019	% Change	2024	2019	% Change	2024	2019	% Change
State of Hawai'i	1,735.4	1,675.7	3.6%	1,294.5	1,321.0	-2.0%	497.5	376.0	32.3%
O'ahu	961.0	942.5	2.0%	756.2	753.9	0.3%	214.8	173.0	24.2%
Waikiki	805.3	808.8	-0.4%	638.4	647.3	-1.4%	171.4	144.6	18.5%
Maui County	415.0	394.5	5.2%	286.7	309.4	-7.3%	166.5	131.3	26.8%
Wailea	76.2	68.0	12.1%	51.2	61.6	-17.0%	41.5	39.6	4.9%
Lahaina/Kā'anapali/ Kapalua	223.5	221.2	1.1%	159.0	171.6	-7.3%	76.1	61.0	24.9%
Island of Hawai'i	210.8	199.1	5.9%	142.7	156.9	-9.1%	67.8	43.0	57.6%
Kohala Coast	91.6	93.0	-1.5%	68.6	74.5	-7.9%	44.4	28.7	54.8%
Kaua'i	148.6	139.6	6.4%	109.0	100.8	8.1%	48.4	28.7	68.9%

Source: STR, Inc. © Copyright 2024 Hawai'i Tourism Authority

Figure 5: Hawai'i Hotel Performance Year-to-Date March 2024

	Occupancy %			Average Daily Rate			RevPAR		
	2024	2023	Percentage Pt. Change	2024	2023	% Change	2024	2023	% Change
State of Hawai'i	76.5%	75.1%	1.4%	\$378.22	\$388.91	-2.7%	\$289.43	\$292.07	-0.9%
Luxury Class	62.0%	60.1%	1.9%	\$836.41	\$871.42	-4.0%	\$518.67	\$523.44	-0.9%
Upper Upscale Class	79.5%	79.7%	-0.1%	\$351.04	\$358.75	-2.1%	\$279.24	\$285.80	-2.3%
Upscale Class	81.8%	76.5%	5.3%	\$273.94	\$287.54	-4.7%	\$224.15	\$220.01	1.9%
Upper Midscale Class	75.2%	75.2%	0.0%	\$234.69	\$244.61	-4.1%	\$176.38	\$183.91	-4.1%
Midscale & Economy Class	77.3%	76.2%	1.2%	\$236.19	\$242.92	-2.8%	\$182.66	\$185.05	-1.3%
O'ahu	80.5%	77.6%	2.9%	\$283.87	\$272.81	4.1%	\$228.42	\$211.67	7.9%
Waikiki	81.0%	77.7%	3.3%	\$271.64	\$260.99	4.1%	\$219.97	\$202.71	8.5%
Other O'ahu	77.7%	77.1%	0.6%	\$351.54	\$339.34	3.6%	\$273.24	\$261.76	4.4%
O'ahu Luxury	60.1%	60.3%	-0.2%	\$704.03	\$671.93	4.8%	\$423.28	\$405.22	4.5%
O'ahu Upper Upscale	82.2%	79.7%	2.4%	\$299.75	\$284.20	5.5%	\$246.34	\$226.60	8.7%
O'ahu Upscale	87.2%	82.3%	4.9%	\$211.51	\$207.35	2.0%	\$184.44	\$170.60	8.1%
O'ahu Upper Midscale	79.7%	73.9%	5.8%	\$174.93	\$173.02	1.1%	\$139.39	\$127.81	9.1%
O'ahu Midscale & Economy	79.7%	77.3%	2.4%	\$158.01	\$153.87	2.7%	\$125.91	\$118.87	5.9%
Maui County	71.5%	69.7%	1.8%	\$561.44	\$644.11	-12.8%	\$401.49	\$448.81	-10.5%
Wailea	70.0%	62.3%	7.7%	\$776.50	\$871.62	-10.9%	\$543.64	\$543.33	0.1%
Lahaina/Kā'anapali/Kapalua	73.9%	73.6%	0.2%	\$469.57	\$564.95	-16.9%	\$346.93	\$416.04	-16.6%
Other Maui County	68.7%	64.9%	3.9%	\$676.66	\$753.01	-10.1%	\$465.15	\$488.52	-4.8%
Maui County Luxury	58.8%	55.5%	3.3%	\$951.71	\$1,127.96	-15.6%	\$559.47	\$626.26	-10.7%
Maui County Upper Upscale & Upscale	76.2%	74.9%	1.3%	\$455.42	\$526.44	-13.5%	\$347.05	\$394.19	-12.0%
Island of Hawai'i	70.2%	75.3%	-5.2%	\$459.62	\$425.40	8.0%	\$322.44	\$320.48	0.6%
Kohala Coast	76.0%	76.7%	-0.7%	\$621.37	\$596.37	4.2%	\$472.42	\$457.64	3.2%
Kaua'i	74.3%	74.7%	-0.5%	\$433.33	\$413.12	4.9%	\$321.75	\$308.64	4.2%

Source: STR, Inc. © Copyright 2024 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 March 2024

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2024	2023	% Change	2024	2023	% Change	2024	2023	% Change
State of Hawai'i	5,020.9	5,005.6	0.3%	3,842.3	3,759.2	2.2%	1,453.2	1,462.0	-0.6%
O'ahu	2,772.6	2,736.5	1.3%	2,231.0	2,123.2	5.1%	633.3	579.2	9.3%
Waikiki	2,333.0	2,321.6	0.5%	1,889.3	1,803.1	4.8%	513.2	470.6	9.1%
Maui County	1,205.0	1,251.5	-3.7%	861.7	872.0	-1.2%	483.8	561.7	-13.9%
Wailea	221.3	220.6	0.4%	155.0	137.5	12.7%	120.3	119.8	0.4%
Lahaina/Kā'anapali/Kapalua	648.9	685.7	-5.4%	479.4	505.0	-5.1%	225.1	285.3	-21.1%
Island of Hawai'i	612.0	590.8	3.6%	429.3	445.1	-3.5%	197.3	189.3	4.2%
Kohala Coast	265.9	265.8	0.0%	202.1	203.9	-0.9%	125.6	121.6	3.3%
Kaua'i	431.4	426.9	1.0%	320.3	318.9	0.4%	138.8	131.8	5.3%

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Figure 7: Hawai'i Hotel Performance Year-to-Date March 2024 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2024	2019	Percentage Pt. Change	2024	2019	% Change	2024	2019	% Change
State of Hawai'i	76.5%	80.5%	-4.0%	\$378.22	\$291.30	29.8%	\$289.43	\$234.50	23.4%
Luxury Class	62.0%	75.7%	-13.7%	\$836.41	\$594.11	40.8%	\$518.67	\$450.01	15.3%
Upper Upscale Class	79.5%	82.7%	-3.2%	\$351.04	\$283.95	23.6%	\$279.24	\$234.91	18.9%
Upscale Class	81.8%	77.0%	4.8%	\$273.94	\$222.24	23.3%	\$224.15	\$171.16	31.0%
Upper Midscale Class	75.2%	83.9%	-8.7%	\$234.69	\$166.12	41.3%	\$176.38	\$139.31	26.6%
Midscale & Economy Class	77.3%	83.2%	-5.9%	\$236.19	\$187.96	25.7%	\$182.66	\$156.43	16.8%
O'ahu	80.5%	82.8%	-2.4%	\$283.87	\$234.87	20.9%	\$228.42	\$194.55	17.4%
Waikiki	81.0%	83.1%	-2.1%	\$271.64	\$229.73	18.2%	\$219.97	\$190.81	15.3%
Other O'ahu	77.7%	81.5%	-3.7%	\$351.54	\$266.58	31.9%	\$273.24	\$217.19	25.8%
O'ahu Luxury	60.1%	70.2%	-10.1%	\$704.03	\$497.71	41.5%	\$423.28	\$349.51	21.1%
O'ahu Upper Upscale	82.2%	84.5%	-2.3%	\$299.75	\$256.63	16.8%	\$246.34	\$216.87	13.6%
O'ahu Upscale	87.2%	82.0%	5.2%	\$211.51	\$192.55	9.8%	\$184.44	\$157.80	16.9%
O'ahu Upper Midscale	79.7%	84.1%	-4.5%	\$174.93	\$157.44	11.1%	\$139.39	\$132.46	5.2%
O'ahu Midscale & Economy	79.7%	87.5%	-7.8%	\$158.01	\$133.91	18.0%	\$125.91	\$117.20	7.4%
Maui County	71.5%	78.1%	-6.6%	\$561.44	\$433.46	29.5%	\$401.49	\$338.48	18.6%
Wailea	70.0%	88.8%	-18.8%	\$776.50	\$647.26	20.0%	\$543.64	\$574.63	-5.4%
Lahaina/Kā'anapali/Kapalua	73.9%	76.9%	-3.0%	\$469.57	\$364.51	28.8%	\$346.93	\$280.28	23.8%
Other Maui County	68.7%	79.6%	-10.9%	\$676.66	\$518.44	30.5%	\$465.15	\$412.76	12.7%
Maui County Luxury	58.8%	80.3%	-21.5%	\$951.71	\$703.43	35.3%	\$559.47	\$565.04	-1.0%
Maui County Upper Upscale & Upscale	76.2%	77.8%	-1.6%	\$455.42	\$345.43	31.8%	\$347.05	\$268.91	29.1%
Island of Hawai'i	70.2%	79.0%	-8.8%	\$459.62	\$285.15	61.2%	\$322.44	\$225.22	43.2%
Kohala Coast	76.0%	79.3%	-3.3%	\$621.37	\$400.99	55.0%	\$472.42	\$318.07	48.5%
Kauai	74.3%	73.8%	0.5%	\$433.33	\$303.10	43.0%	\$321.75	\$223.60	43.9%

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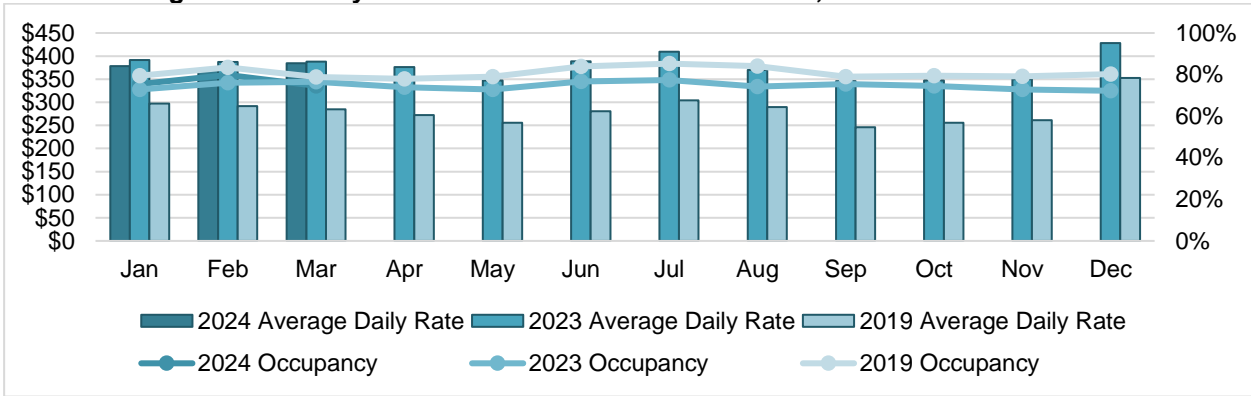
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date 2024 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2024	2019	% Change	2024	2019	% Change	2024	2019	% Change
State of Hawai'i	5,020.9	4,865.9	3.2%	3,842.3	3,917.1	-1.9%	1,453.2	1,141.0	27.4%
O'ahu	2,772.6	2,736.2	1.3%	2,231.0	2,266.4	-1.6%	633.3	532.3	19.0%
Waikiki	2,333.0	2,348.0	-0.6%	1,889.3	1,950.2	-3.1%	513.2	448.0	14.5%
Maui County	1,205.0	1,145.3	5.2%	861.7	894.4	-3.7%	483.8	387.7	24.8%
Wailea	221.3	197.5	12.1%	155.0	175.3	-11.6%	120.3	113.5	6.0%
Lahaina/Kā'anapali/Kapalua	648.9	642.2	1.1%	479.4	493.8	-2.9%	225.1	180.0	25.1%
Island of Hawai'i	612.0	578.1	5.9%	429.3	456.6	-6.0%	197.3	130.2	51.6%
Kohala Coast	265.9	270.0	-1.5%	202.1	214.2	-5.6%	125.6	85.9	46.2%
Kauai	431.4	406.3	6.2%	320.3	299.7	6.9%	138.8	90.9	52.8%

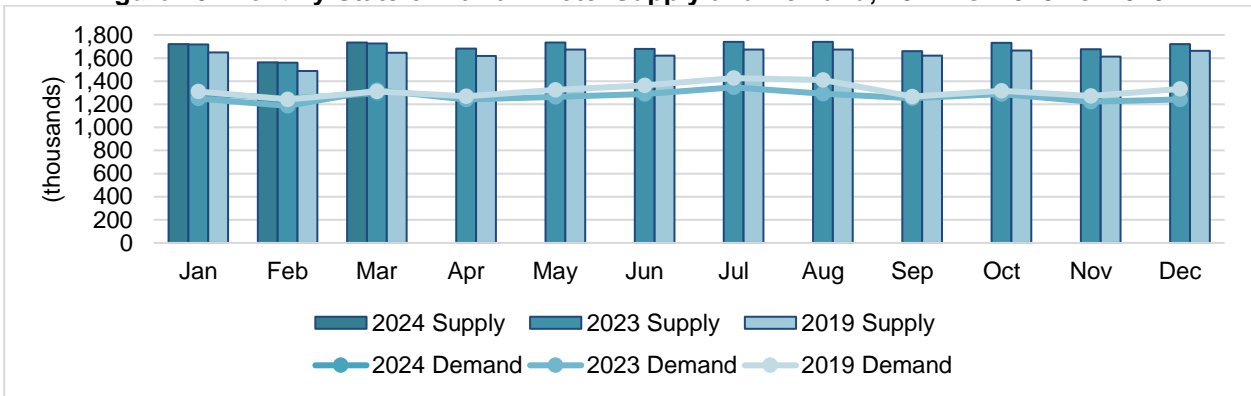
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2024 vs. 2023 vs. 2019



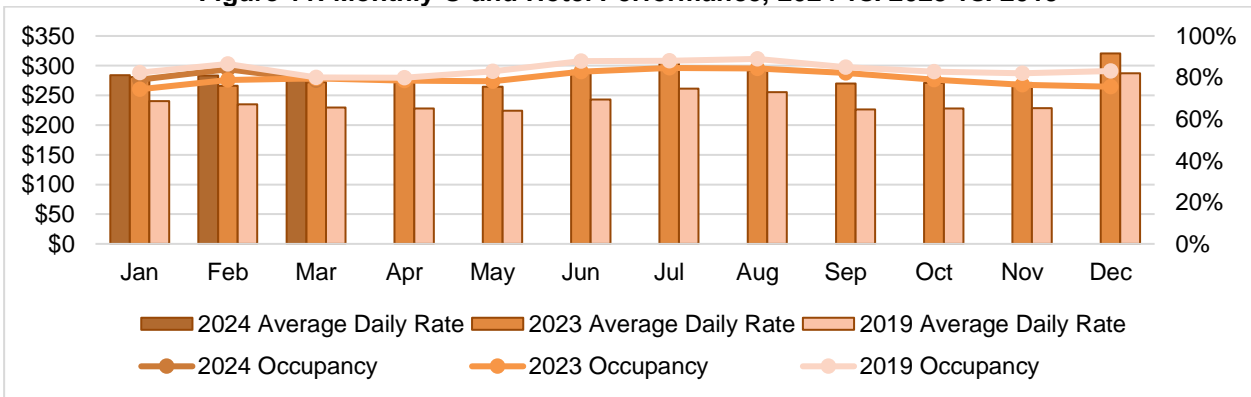
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2024 vs. 2023 vs. 2019



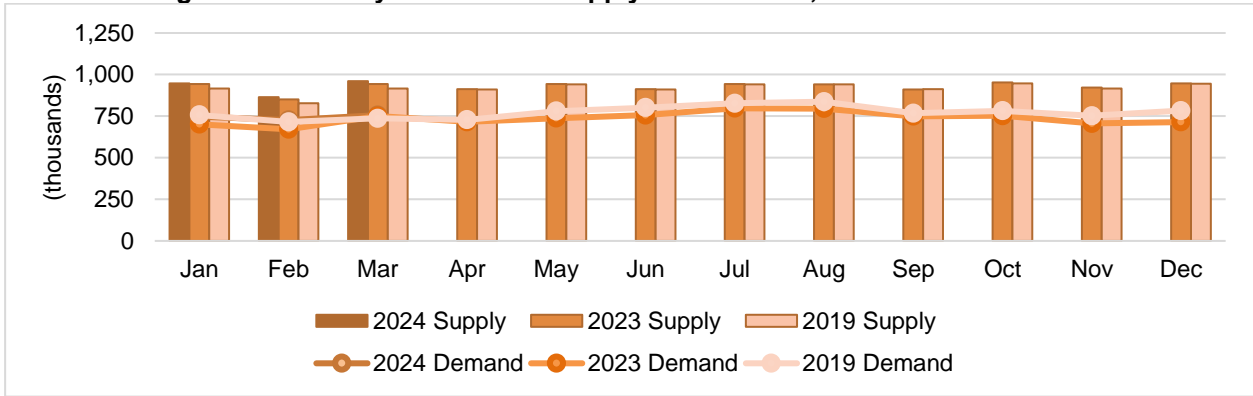
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Figure 11: Monthly O'ahu Hotel Performance, 2024 vs. 2023 vs. 2019



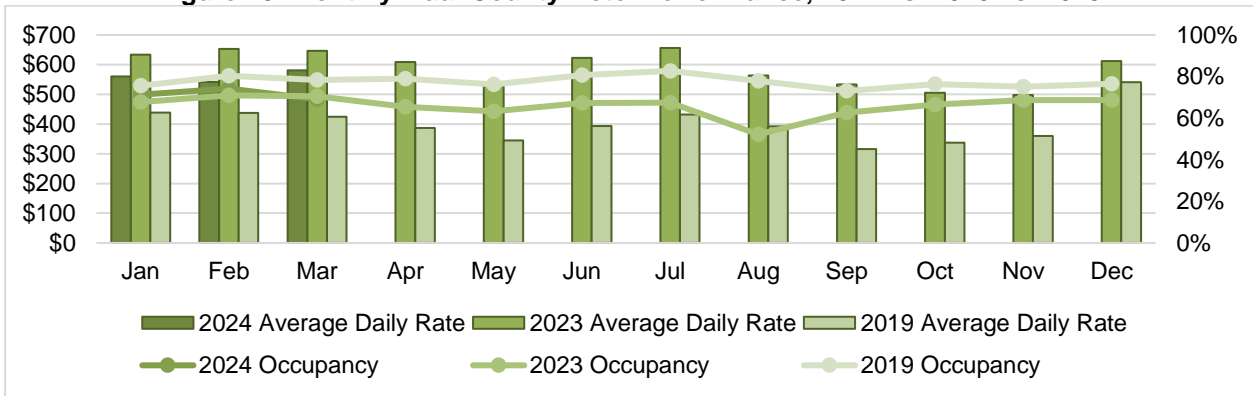
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2024 vs. 2023 vs. 2019



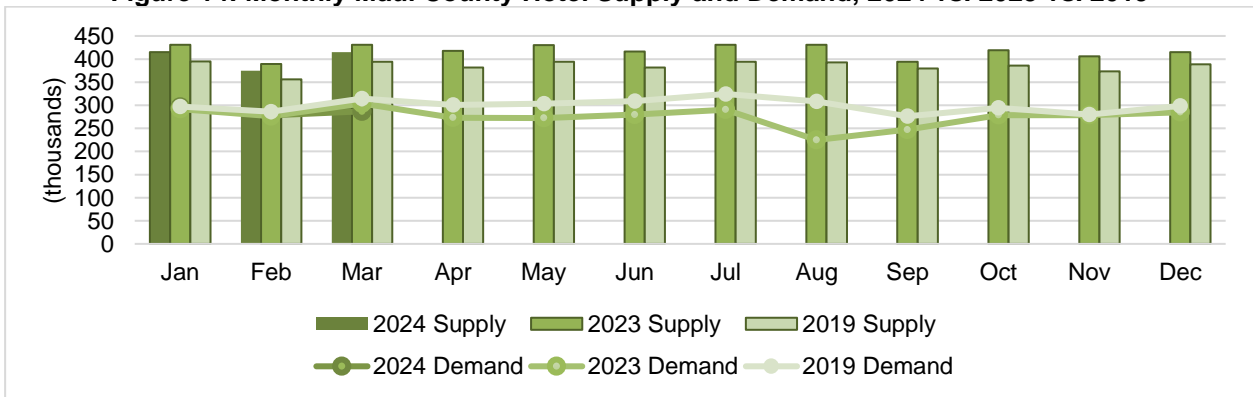
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Figure 13: Monthly Maui County Hotel Performance, 2024 vs. 2023 vs. 2019



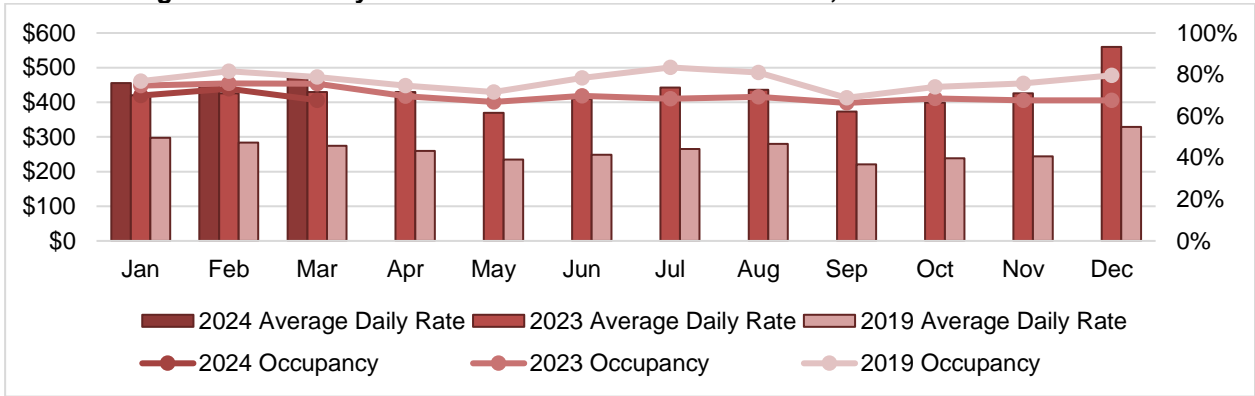
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2024 vs. 2023 vs. 2019



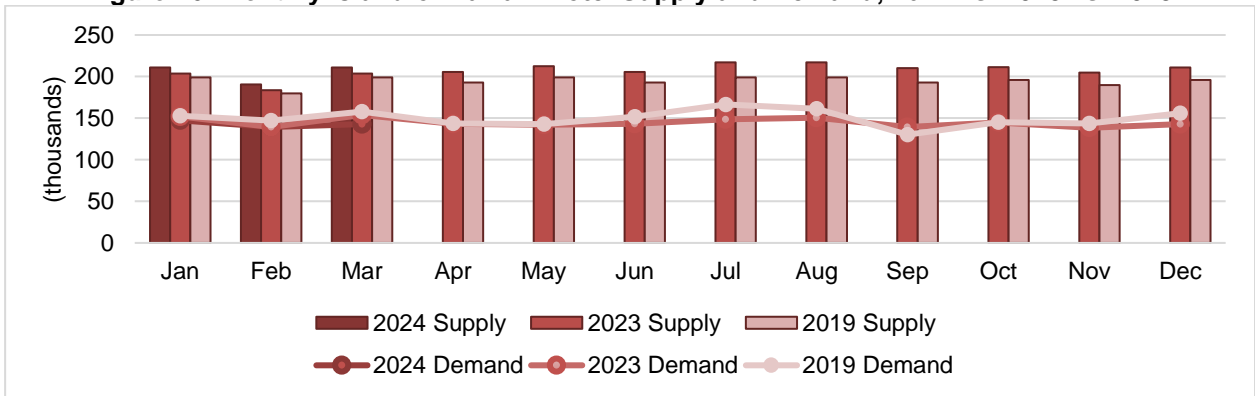
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2024 vs. 2023 vs. 2019



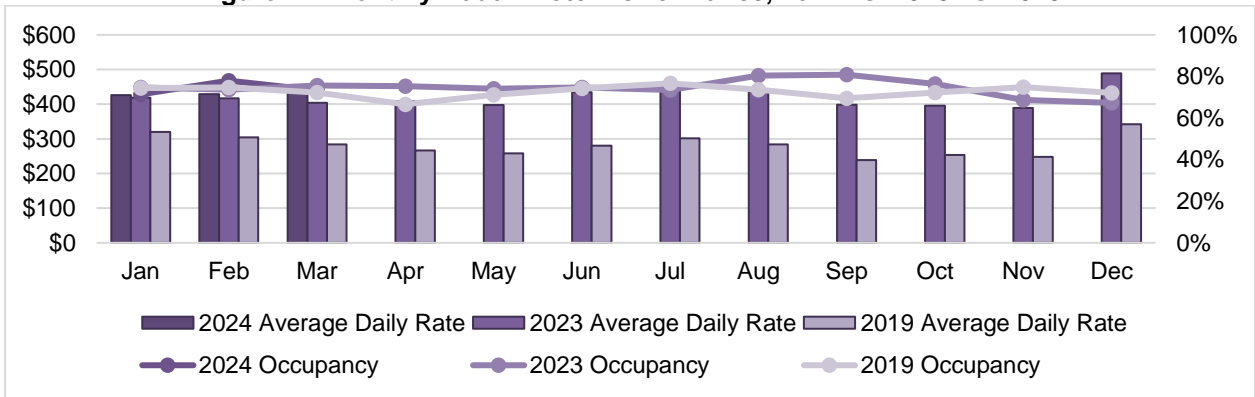
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2024 vs. 2023 vs. 2019



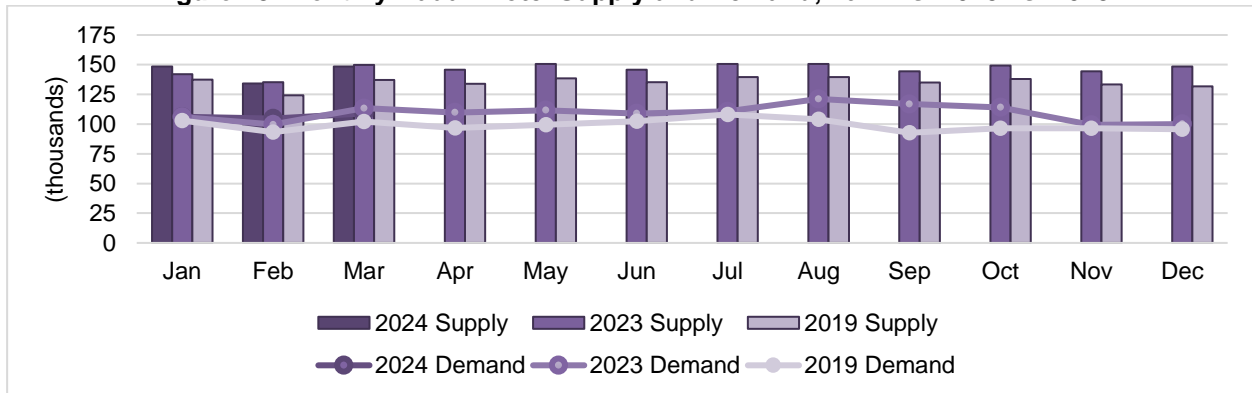
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Figure 17: Monthly Kaua'i Hotel Performance, 2024 vs. 2023 vs. 2019



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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2024 vs. 2023 vs. 2019



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Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD March 2024

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$289.43	-0.9%
2	Miami, FL	\$225.71	2.8%
3	Las Vegas, NV	\$186.29	15.3%
4	New York, NY	\$172.31	11.6%
5	Phoenix, AZ	\$169.90	-7.8%

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Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD March 2024

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$378.22	-2.7%
2	Miami, FL	\$275.51	-0.4%
3	San Francisco/San Mateo, CA	\$238.92	-0.2%
4	Las Vegas, NV	\$237.86	15.9%
5	New York, NY	\$230.79	6.7%

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Figure 21: Top 5 U.S. Markets – Occupancy – YTD March 2024

Rank	Destination	Occupancy	Percentage Pt. Change
1	Miami, FL	81.9%	2.6%
2	Las Vegas, NV	78.3%	-0.4%
3	Orlando, FL	77.4%	-1.6%
4	Phoenix, AZ	76.9%	-1.3%
5	Hawaiian Islands	76.5%	1.4%

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Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD March 2024

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$563.22	-0.1%
2	French Polynesia	\$448.05	-6.5%
3	Aruba	\$422.03	23.1%
4	Maui County	\$401.49	-10.5%
5	Hawai'i Island	\$322.44	0.6%
6	Kaua'i	\$321.75	4.2%
7	Cabo San Lucas+	\$298.43	11.6%
8	Puerto Rico	\$274.67	10.1%
9	Cancun+	\$249.45	9.9%
10	O'ahu	\$228.42	7.9%
11	Costa Rica	\$223.80	16.4%
12	Puerto Vallarta+	\$179.33	11.0%
13	Phuket	\$151.89	10.3%
14	Fiji	\$136.55	2.5%
15	Bali	\$83.42	17.8%

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Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD March 2024

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$745.58	0.0%
2	French Polynesia	\$706.73	4.1%
3	Maui County	\$561.44	-12.8%
4	Aruba	\$516.75	8.6%
5	Hawai'i Island	\$459.62	8.0%
6	Cabo San Lucas+	\$455.66	7.6%
7	Kaua'i	\$433.33	4.9%
8	Puerto Rico	\$348.84	7.3%
9	Cancun+	\$308.72	6.8%
10	Costa Rica	\$286.26	10.4%
11	O'ahu	\$283.87	4.1%
12	Puerto Vallarta+	\$217.96	12.8%
13	Fiji	\$213.15	6.9%
14	Phuket	\$189.34	6.7%
15	Bali	\$132.00	12.8%

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Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD March 2024

Rank	Destination	Occupancy	Percentage Pt. Change
1	Puerto Vallarta+	82.3%	-1.4%
2	Aruba	81.7%	9.6%
3	Cancun+	80.8%	2.3%
4	O'ahu	80.5%	2.9%
5	Phuket	80.2%	2.6%
6	Puerto Rico	78.7%	2.0%
7	Costa Rica	78.2%	4.1%
8	Maldives	75.5%	-0.1%
9	Kaua'i	74.3%	-0.5%
10	Maui County	71.5%	1.8%
11	Hawai'i Island	70.2%	-5.2%
12	Cabo San Lucas+	65.5%	2.3%
13	Fiji	64.1%	-2.8%
14	French Polynesia	63.4%	-7.1%
15	Bali	63.2%	2.7%

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