



September 2023 Hawai'i Hotel Performance Report

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

According to the Hawai'i Hotel Performance Report published by the Hawai'i Tourism Authority (HTA), statewide RevPAR in September 2023 was \$261 (+5.8%), with ADR at \$346 (+3.0%) and occupancy of 75.5 percent (+2.0 percentage points) compared to September 2022 (Figure 1). Compared with September 2019, RevPAR was 34.3 percent higher, driven by higher ADR (+40.5%) which offset lower occupancy (-3.5 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 September 2023, the survey included 149 properties representing 45,684 rooms, or 82.6 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 \$433.0 million (+4.7% vs. 2022, +39.2% vs. 2019) in September 2023. Room demand was 1.3 million room nights (+1.7% vs. 2022, -0.9% vs. 2019) and room supply was 1.7 million room nights (-1.0% vs. 2022, +3.7% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$382 (-3.4% vs. 2022, +18.1% vs. 2019), with ADR at \$677 (-6.1% vs. 2022, +48.4% vs. 2019) and occupancy of 56.4 percent (+1.6 percentage points vs. 2022, -14.5 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$183 (+7.3% vs. 2022, +42.2% vs. 2019) with ADR at \$235 (+4.6% vs. 2022, +48.1% vs. 2019) and occupancy of 77.6 percent (+2.0 percentage points vs. 2022, -3.2 percentage points vs. 2019).

Maui County hotels continued to be impacted by the August 8 Wildfires, but still led the counties in September 2023 RevPAR due to comparatively higher ADR. Maui County hotels achieved RevPAR of \$335 (-1.9% vs. 2022, +44.9% vs. 2019), with ADR at \$534 (+2.6% vs. 2022, +68.9% vs. 2019) and occupancy of 62.7 percent (-2.8 percentage points vs. 2022, -10.4 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$327 (-24.7% vs. 2022, -13.8% vs. 2019), with ADR at \$646 (-21.0% vs. 2022, +40.2% vs. 2019) and occupancy of 50.6 percent (-2.5 percentage points vs. 2022, -31.8 percentage points vs. 2019). Hotels in the Lahaina/Kā'anapali/Kapalua region were almost exclusively occupied by displaced Lahaina residents impacted by the fires and relief workers. The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$354 (+9.1% vs. 2022, +78.6% vs. 2019), ADR at \$535 (+14.2% vs. 2022, +93.6% vs. 2019) and occupancy of 66.2 percent (-3.1 percentage points vs. 2022, -5.6 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$322 (+15.4% vs. 2022, +94.2% vs. 2019), with ADR at \$398 (+9.7% vs. 2022, +67.0% vs. 2019) and occupancy of 80.9 percent (+4.0 percentage points vs. 2022, +11.3 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$248 (+1.2% vs. 2022, +62.6% vs. 2019), with ADR at \$373 (+8.2% vs. 2022, +68.7% vs. 2019), and occupancy of 66.4 percent (-4.6

percentage points vs. 2022, -2.5 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$337 (+3.2% vs. 2022, +63.8% vs. 2019), with ADR at \$480 (-0.2% vs. 2022, +55.3% vs. 2019), and occupancy of 70.2 percent (+2.3 percentage points vs. 2022, +3.6 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$222 (+11.8% vs. 2022, +15.7% vs. 2019) in September, ADR at \$270 (+4.9% vs. 2022, +19.4% vs. 2019) and occupancy of 82.2 percent (+5.1 percentage points vs. 2022, -2.7 percentage points vs. 2019). Waikīkī hotels earned RevPAR of \$216 (+11.8% vs. 2022, +12.5% vs. 2019), with ADR at \$260 (+4.6% vs. 2022, +16.2% vs. 2019) and occupancy of 83.0 percent (+5.3 percentage points vs. 2022, -2.7 percentage points vs. 2019).

Year-to-Date (YTD) Quarter 3 2023

During the first nine months of 2023, Hawai'i's hotels earned \$285 in RevPAR (+3.4% vs. 2022, +25.1% vs. 2019), with ADR at \$379 (+2.0% vs. 2022, +35.0% vs. 2019) and occupancy of 75.3 percent (+1.0 percentage points vs. 2022, -6.0 percentage points vs. 2019).

Total statewide hotel revenues for the first nine months of 2023 were \$4.3 billion (+3.1% vs. 2022, +29.3% vs. 2019). Room supply was 15.2 million room nights (-0.4% vs. 2022, +3.4% vs. 2019), and room demand was 11.5 million room nights (+1.0% vs. 2022, -4.2% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest YTD Quarter 3 2023 RevPAR at \$285 (+3.4%). New York, New York was second at \$224 (+20.1%), followed by San Diego, California at \$163 (+5.0%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in YTD 2023 ADR at \$379 (+2.0%), followed by New York, New York at \$279 (+8.7%) and San Francisco/San Mateo, California at \$226 (+6.4%) (Figure 20).

In the first nine months of 2023, New York, New York topped the country in occupancy at 80.1 percent (+7.6 percentage points), followed by Las Vegas, Nevada at 78.5 percent (+4.7 percentage points) and San Diego, California at 75.8 percent (+1.5 percentage points) (Figure 21). The Hawaiian Islands at 75.3 percent occupancy was ranked fourth (Figure 21).

Comparison to International Markets

Hotels in French Polynesia ranked highest in YTD Quarter 3 2023 RevPAR for international "sun and sea" destinations at \$631 (+29.1%), followed by Maui County (\$399, -3.6%). Kaua'i (\$321, +4.4%), Hawai'i Island (\$295, -4.0%), and O'ahu (\$225, +12.3%) ranked fourth, fifth, and seventh, respectively (Figure 22).

Hotels in French Polynesia led in YTD Quarter 3 ADR at \$840 (+17.1%), followed by Maui County (\$609, +0.7%) and Maldives (\$576, -1.5%). Kaua'i (\$419, +6.3%), Hawai'i Island (\$416, +0.8%), and O'ahu (\$280, +6.4%) ranked fourth, fifth, and ninth, respectively (Figure 23).

O'ahu led in occupancy for "sun and sea" destinations at 80.5 percent (+4.2 percentage points), followed by Fiji (78.4%, +10.8 percentage points) and Kaua'i (76.6%, -1.4 percentage points). Hawai'i Island (71.0%, -3.5 percentage points) and Maui County (65.5%, -2.9 percentage points) ranked eighth 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 September 2023, the survey included 149 properties representing 45,684 rooms, or 82.6 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The September survey included 75 properties on O'ahu, representing 27,988 rooms (92.2%); 36 properties in the County of Maui, representing 8,891 rooms (67.6%); 18 properties on the island of Hawai'i, representing 5,140 rooms (73.4%); and 20 properties on Kaua'i, representing 3,665 rooms (76.1%).

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 September 2023

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2022	Percentage Pt. Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	75.5%	73.4%	2.0%	\$345.64	\$335.67	3.0%	\$260.83	\$246.53	5.8%
Luxury Class	56.4%	54.8%	1.6%	\$676.69	\$720.43	-6.1%	\$381.56	\$394.90	-3.4%
Upper Upscale Class	80.7%	77.4%	3.2%	\$338.42	\$325.00	4.1%	\$272.99	\$251.63	8.5%
Upscale Class	79.3%	76.9%	2.4%	\$271.57	\$249.99	8.6%	\$215.23	\$192.19	12.0%
Upper Midscale Class	71.7%	75.3%	-3.7%	\$246.03	\$223.42	10.1%	\$176.29	\$168.32	4.7%
Midscale & Economy Class	77.6%	75.6%	2.0%	\$235.46	\$225.19	4.6%	\$182.60	\$170.19	7.3%
O'ahu	82.2%	77.1%	5.1%	\$270.23	\$257.66	4.9%	\$222.23	\$198.72	11.8%
Waikiki	83.0%	77.6%	5.3%	\$260.28	\$248.79	4.6%	\$216.03	\$193.18	11.8%
Other O'ahu	78.0%	74.2%	3.8%	\$329.37	\$309.51	6.4%	\$256.86	\$229.65	11.8%
O'ahu Luxury	66.8%	56.4%	10.4%	\$614.53	\$622.46	-1.3%	\$410.58	\$351.18	16.9%
O'ahu Upper Upscale	85.3%	80.2%	5.1%	\$283.15	\$268.96	5.3%	\$241.58	\$215.83	11.9%
O'ahu Upscale	85.3%	80.5%	4.8%	\$200.79	\$195.94	2.5%	\$171.24	\$157.67	8.6%
O'ahu Upper Midscale	73.6%	72.1%	1.5%	\$164.56	\$159.55	3.1%	\$121.11	\$114.99	5.3%
O'ahu Midscale & Economy	82.0%	77.6%	4.4%	\$152.88	\$147.92	3.4%	\$125.36	\$114.72	9.3%
Maui County	62.7%	65.5%	-2.8%	\$533.86	\$520.43	2.6%	\$334.60	\$340.92	-1.9%
Wailea	50.6%	53.1%	-2.5%	\$645.93	\$817.40	-21.0%	\$327.15	\$434.34	-24.7%
Lahaina/Kā'anapali/Kapalua	66.2%	69.3%	-3.1%	\$534.51	\$467.93	14.2%	\$354.05	\$324.46	9.1%
Other Maui County	58.8%	60.8%	-2.0%	\$533.08	\$593.44	-10.2%	\$313.40	\$361.00	-13.2%
Maui County Luxury	40.8%	46.7%	-5.9%	\$755.31	\$882.97	-14.5%	\$308.10	\$412.68	-25.3%
Maui County Upper Upscale & Upscale	69.3%	71.8%	-2.5%	\$513.13	\$462.39	11.0%	\$355.74	\$332.05	7.1%
Island of Hawai'i	66.4%	71.0%	-4.6%	\$373.15	\$344.89	8.2%	\$247.61	\$244.76	1.2%
Kohala Coast	70.2%	67.9%	2.3%	\$480.08	\$481.08	-0.2%	\$337.19	\$326.68	3.2%
Kauai	80.9%	76.9%	4.0%	\$398.19	\$362.84	9.7%	\$322.02	\$279.06	15.4%

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 September 2023

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2022	% Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	1,659.9	1,677.0	-1.0%	1,252.6	1,231.6	1.7%	433.0	413.4	4.7%
O'ahu	911.0	911.4	0.0%	749.2	702.9	6.6%	202.5	181.1	11.8%
Waikiki	772.7	772.9	0.0%	641.3	600.2	6.9%	166.9	149.3	11.8%
Maui County	394.4	417.9	-5.6%	247.2	273.7	-9.7%	132.0	142.5	-7.4%
Wailea	89.0	88.7	0.3%	45.1	47.2	-4.4%	29.1	38.5	-24.4%
Lahaina/Kā'anapali/ Kapalua	205.7	229.7	-10.5%	136.2	159.2	-14.5%	72.8	74.5	-2.3%
Island of Hawai'i	210.0	209.5	0.2%	139.3	148.7	-6.3%	52.0	51.3	1.4%
Kohala Coast	88.6	89.0	-0.4%	62.2	60.4	3.0%	29.9	29.1	2.8%
Kauai	144.5	138.2	4.5%	116.9	106.3	9.9%	46.5	38.6	20.6%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2019	Pt. Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	75.5%	78.9%	-3.5%	\$345.64	\$246.00	40.5%	\$260.83	\$194.20	34.3%
Luxury Class	56.4%	70.9%	-14.5%	\$676.69	\$456.01	48.4%	\$381.56	\$323.13	18.1%
Upper Upscale Class	80.7%	80.0%	0.7%	\$338.42	\$251.66	34.5%	\$272.99	\$201.29	35.6%
Upscale Class	79.3%	79.5%	-0.3%	\$271.57	\$191.96	41.5%	\$215.23	\$152.66	41.0%
Upper Midscale Class	71.7%	83.3%	-11.6%	\$246.03	\$156.24	57.5%	\$176.29	\$130.15	35.5%
Midscale & Economy Class	77.6%	80.8%	-3.2%	\$235.46	\$158.95	48.1%	\$182.60	\$128.40	42.2%
O'ahu	82.2%	84.9%	-2.7%	\$270.23	\$226.26	19.4%	\$222.23	\$192.15	15.7%
Waikiki	83.0%	85.7%	-2.7%	\$260.28	\$224.05	16.2%	\$216.03	\$192.11	12.5%
Other O'ahu	78.0%	80.0%	-2.0%	\$329.37	\$240.61	36.9%	\$256.86	\$192.39	33.5%
O'ahu Luxury	66.8%	74.2%	-7.4%	\$614.53	\$450.07	36.5%	\$410.58	\$333.99	22.9%
O'ahu Upper Upscale	85.3%	85.7%	-0.4%	\$283.15	\$246.01	15.1%	\$241.58	\$210.91	14.5%
O'ahu Upscale	85.3%	88.0%	-2.7%	\$200.79	\$192.64	4.2%	\$171.24	\$169.53	1.0%
O'ahu Upper Midscale	73.6%	83.9%	-10.3%	\$164.56	\$153.33	7.3%	\$121.11	\$128.61	-5.8%
O'ahu Midscale & Economy	82.0%	88.5%	-6.5%	\$152.88	\$131.31	16.4%	\$125.36	\$116.23	7.9%
Maui County	62.7%	73.1%	-10.4%	\$533.86	\$316.01	68.9%	\$334.60	\$230.88	44.9%
Wailea	50.6%	82.4%	-31.8%	\$645.93	\$460.63	40.2%	\$327.15	\$379.64	-13.8%
Lahaina/Kā'anapali/Kapalua	66.2%	71.8%	-5.6%	\$534.51	\$276.04	93.6%	\$354.05	\$198.29	78.6%
Other Maui County	58.8%	74.6%	-15.8%	\$533.08	\$364.45	46.3%	\$313.40	\$271.90	15.3%
Maui County Luxury	40.8%	73.8%	-33.0%	\$755.31	\$483.79	56.1%	\$308.10	\$357.22	-13.8%
Maui County Upper Upscale & Upscale	69.3%	73.2%	-3.8%	\$513.13	\$261.97	95.9%	\$355.74	\$191.64	85.6%
Island of Hawai'i	66.4%	68.8%	-2.5%	\$373.15	\$221.21	68.7%	\$247.61	\$152.25	62.6%
Kohala Coast	70.2%	66.6%	3.6%	\$480.08	\$309.06	55.3%	\$337.19	\$205.89	63.8%
Kauai	80.9%	69.6%	11.3%	\$398.19	\$238.41	67.0%	\$322.02	\$165.86	94.2%

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 September 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	1,659.9	1,601.4	3.7%	1,252.6	1,264.2	-0.9%	433.0	311.0	39.2%
O'ahu	911.0	902.1	1.0%	749.2	766.1	-2.2%	202.5	173.3	16.8%
Waikiki	772.7	774.2	-0.2%	641.3	663.8	-3.4%	166.9	148.7	12.2%
Maui County	394.4	373.3	5.7%	247.2	272.7	-9.4%	132.0	86.2	53.1%
Wailea	89.0	65.8	35.3%	45.1	54.2	-16.9%	29.1	25.0	16.6%
Lahaina/Kā'anapali/ Kapalua	205.7	208.0	-1.1%	136.2	149.4	-8.8%	72.8	41.2	76.5%
Island of Hawai'i	210.0	191.2	9.9%	139.3	131.6	5.9%	52.0	29.1	78.7%
Kohala Coast	88.6	88.2	0.4%	62.2	58.8	5.9%	29.9	18.2	64.5%
Kauai	144.5	134.8	7.2%	116.9	93.8	24.6%	46.5	22.4	108.1%

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

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2022	Percentage Pt. Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	75.3%	74.3%	1.0%	\$378.62	\$371.10	2.0%	\$285.08	\$275.61	3.4%
Luxury Class	60.2%	59.6%	0.6%	\$838.71	\$859.93	-2.5%	\$505.24	\$512.47	-1.4%
Upper Upscale Class	79.6%	77.6%	2.0%	\$354.76	\$345.63	2.6%	\$282.30	\$268.26	5.2%
Upscale Class	78.0%	77.3%	0.7%	\$270.08	\$260.99	3.5%	\$210.66	\$201.82	4.4%
Upper Midscale Class	72.7%	74.6%	-1.9%	\$239.14	\$231.87	3.1%	\$173.92	\$172.94	0.6%
Midscale & Economy Class	77.3%	75.5%	1.8%	\$249.24	\$242.67	2.7%	\$192.58	\$183.14	5.2%
O'ahu	80.5%	76.3%	4.2%	\$279.98	\$263.02	6.4%	\$225.42	\$200.70	12.3%
Waikiki	80.9%	76.7%	4.3%	\$267.03	\$250.24	6.7%	\$216.10	\$191.86	12.6%
Other O'ahu	78.2%	74.3%	3.9%	\$354.91	\$337.20	5.3%	\$277.55	\$250.44	10.8%
O'ahu Luxury	63.1%	55.0%	8.1%	\$680.39	\$677.72	0.4%	\$429.52	\$373.07	15.1%
O'ahu Upper Upscale	83.2%	78.8%	4.3%	\$290.95	\$272.49	6.8%	\$241.93	\$214.75	12.7%
O'ahu Upscale	84.1%	81.7%	2.4%	\$208.81	\$201.73	3.5%	\$175.61	\$164.90	6.5%
O'ahu Upper Midscale	74.6%	71.6%	3.0%	\$170.34	\$161.85	5.2%	\$127.06	\$115.83	9.7%
O'ahu Midscale & Economy	81.0%	76.5%	4.5%	\$154.96	\$146.82	5.5%	\$125.52	\$112.38	11.7%
Maui County	65.5%	68.4%	-2.9%	\$608.93	\$604.67	0.7%	\$398.79	\$413.82	-3.6%
Wailea	60.5%	61.9%	-1.4%	\$920.48	\$957.54	-3.9%	\$556.90	\$592.89	-6.1%
Lahaina/Kā'anapali/Kapalua	67.4%	71.0%	-3.6%	\$549.84	\$533.94	3.0%	\$370.36	\$379.01	-2.3%
Other Maui County	63.2%	65.3%	-2.1%	\$684.44	\$698.04	-1.9%	\$432.91	\$456.12	-5.1%
Maui County Luxury	53.0%	55.7%	-2.7%	\$1,036.31	\$1,059.13	-2.2%	\$549.29	\$589.45	-6.8%
Maui County Upper Upscale & Upscale	70.1%	73.3%	-3.2%	\$519.79	\$507.68	2.4%	\$364.15	\$371.92	-2.1%
Island of Hawai'i	71.0%	74.5%	-3.5%	\$415.91	\$412.62	0.8%	\$295.40	\$307.56	-4.0%
Kohala Coast	74.4%	72.5%	1.9%	\$570.77	\$615.73	-7.3%	\$424.54	\$446.18	-4.9%
Kaua'i	76.6%	78.0%	-1.4%	\$418.97	\$394.09	6.3%	\$320.84	\$307.20	4.4%

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 September 2023

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2023	2022	% Change	2023	2022	% Change	2023	2022	% Change
State of Hawai'i	15,245.6	15,301.8	-0.4%	11,479.1	11,364.4	1.0%	4,346.3	4,217.4	3.1%
O'ahu	8,294.9	8,345.0	-0.6%	6,678.6	6,367.8	4.9%	1,869.8	1,674.9	11.6%
Waikiki	7,036.4	7,085.1	-0.7%	5,694.3	5,432.1	4.8%	1,520.5	1,359.3	11.9%
Maui County	3,771.5	3,796.0	-0.6%	2,470.0	2,597.8	-4.9%	1,504.0	1,570.8	-4.3%
Wailea	808.2	808.8	-0.1%	489.0	500.8	-2.4%	450.1	479.5	-6.1%
Lahaina/Kā'anapali/ Kapalua	2,057.1	2,082.5	-1.2%	1,385.7	1,478.2	-6.3%	761.9	789.3	-3.5%
Island of Hawai'i	1,872.9	1,906.7	-1.8%	1,330.2	1,421.2	-6.4%	553.2	586.4	-5.7%
Kohala Coast	806.2	809.1	-0.4%	599.6	586.3	2.3%	342.3	361.0	-5.2%
Kaua'i	1,306.4	1,254.1	4.2%	1,000.4	977.6	2.3%	419.1	385.3	8.8%

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

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

	Occupancy %			Average Daily Rate			RevPAR		
	2023	2019	Percentage Pt. Change	2023	2019	% Change	2023	2019	% Change
State of Hawai'i	75.3%	81.3%	-6.0%	\$378.62	\$280.51	35.0%	\$285.08	\$227.96	25.1%
Luxury Class	60.2%	77.0%	-16.8%	\$838.71	\$558.51	50.2%	\$505.24	\$430.19	17.4%
Upper Upscale Class	79.6%	83.2%	-3.6%	\$354.76	\$280.22	26.6%	\$282.30	\$233.09	21.1%
Upscale Class	78.0%	78.7%	-0.7%	\$270.08	\$209.10	29.2%	\$210.66	\$164.52	28.0%
Upper Midscale Class	72.7%	84.3%	-11.6%	\$239.14	\$163.62	46.2%	\$173.92	\$137.93	26.1%
Midscale & Economy Class	77.3%	82.5%	-5.2%	\$249.24	\$173.54	43.6%	\$192.58	\$143.18	34.5%
O'ahu	80.5%	84.6%	-4.1%	\$279.98	\$238.47	17.4%	\$225.42	\$201.83	11.7%
Waikiki	80.9%	84.9%	-4.0%	\$267.03	\$233.38	14.4%	\$216.10	\$198.14	9.1%
Other O'ahu	78.2%	83.0%	-4.8%	\$354.91	\$270.05	31.4%	\$277.55	\$224.26	23.8%
O'ahu Luxury	63.1%	74.2%	-11.0%	\$680.39	\$491.56	38.4%	\$429.52	\$364.53	17.8%
O'ahu Upper Upscale	83.2%	86.0%	-2.8%	\$290.95	\$262.05	11.0%	\$241.93	\$225.35	7.4%
O'ahu Upscale	84.1%	85.2%	-1.1%	\$208.81	\$195.73	6.7%	\$175.61	\$166.81	5.3%
O'ahu Upper Midscale	74.6%	84.7%	-10.1%	\$170.34	\$157.86	7.9%	\$127.06	\$133.74	-5.0%
O'ahu Midscale & Economy	81.0%	87.9%	-6.9%	\$154.96	\$133.34	16.2%	\$125.52	\$117.21	7.1%
Maui County	65.5%	78.3%	-12.8%	\$608.93	\$396.82	53.5%	\$398.79	\$310.83	28.3%
Wailea	60.5%	89.2%	-28.7%	\$920.48	\$609.03	51.1%	\$556.90	\$543.50	2.5%
Lahaina/Kā'anapali/Kapalua	67.4%	77.5%	-10.2%	\$549.84	\$334.07	64.6%	\$370.36	\$258.94	43.0%
Other Maui County	63.2%	79.4%	-16.1%	\$684.44	\$475.11	44.1%	\$432.91	\$377.12	14.8%
Maui County Luxury	53.0%	81.1%	-28.1%	\$1,036.31	\$645.42	60.6%	\$549.29	\$523.71	4.9%
Maui County Upper Upscale & Upscale	70.1%	78.2%	-8.1%	\$519.79	\$315.58	64.7%	\$364.15	\$246.75	47.6%
Island of Hawai'i	71.0%	77.2%	-6.2%	\$415.91	\$263.49	57.8%	\$295.40	\$203.53	45.1%
Kohala Coast	74.4%	78.0%	-3.7%	\$570.77	\$374.16	52.5%	\$424.54	\$292.00	45.4%
Kauai	76.6%	72.7%	3.9%	\$418.97	\$283.14	48.0%	\$320.84	\$205.75	55.9%

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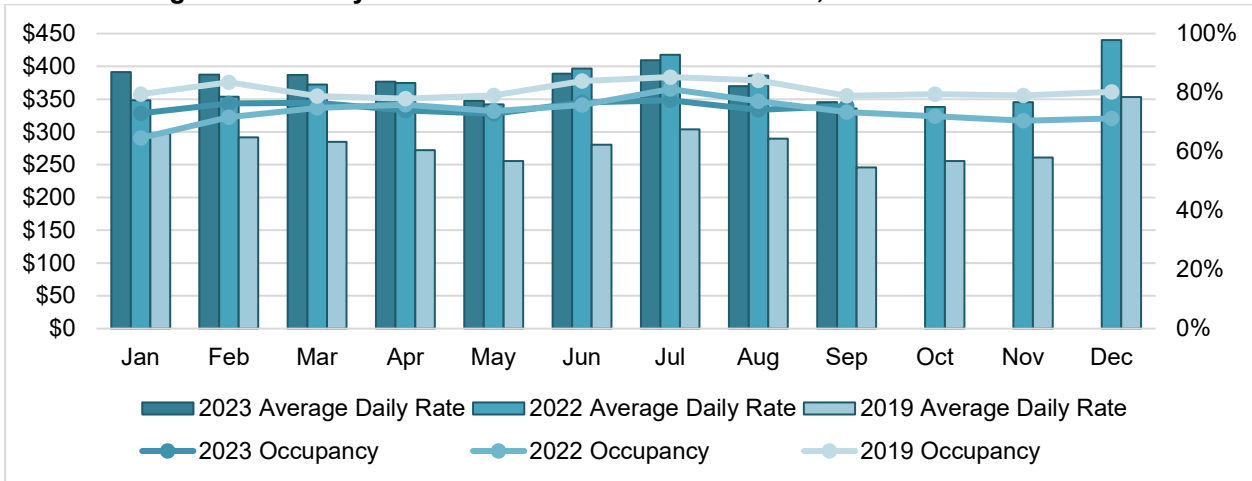
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date September 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	15,245.6	14,741.0	3.4%	11,479.1	11,979.5	-4.2%	4,346.3	3,360.4	29.3%
O'ahu	8,294.9	8,277.7	0.2%	6,678.6	7,006.1	-4.7%	1,869.8	1,670.7	11.9%
Waikiki	7,036.4	7,107.0	-1.0%	5,694.3	6,033.9	-5.6%	1,520.5	1,408.2	8.0%
Maui County	3,771.5	3,461.8	8.9%	2,470.0	2,711.6	-8.9%	1,504.0	1,076.0	39.8%
Wailea	808.2	599.0	34.9%	489.0	534.5	-8.5%	450.1	325.5	38.3%
Lahaina/Kā'anapali/ Kapalua	2,057.1	1,941.8	5.9%	1,385.7	1,505.1	-7.9%	761.9	502.8	51.5%
Island of Hawai'i	1,872.9	1,764.1	6.2%	1,330.2	1,362.7	-2.4%	553.2	359.1	54.1%
Kohala Coast	806.2	817.2	-1.3%	599.6	637.7	-6.0%	342.3	238.6	43.4%
Kauai	1,306.4	1,237.4	5.6%	1,000.4	899.2	11.3%	419.1	254.6	64.6%

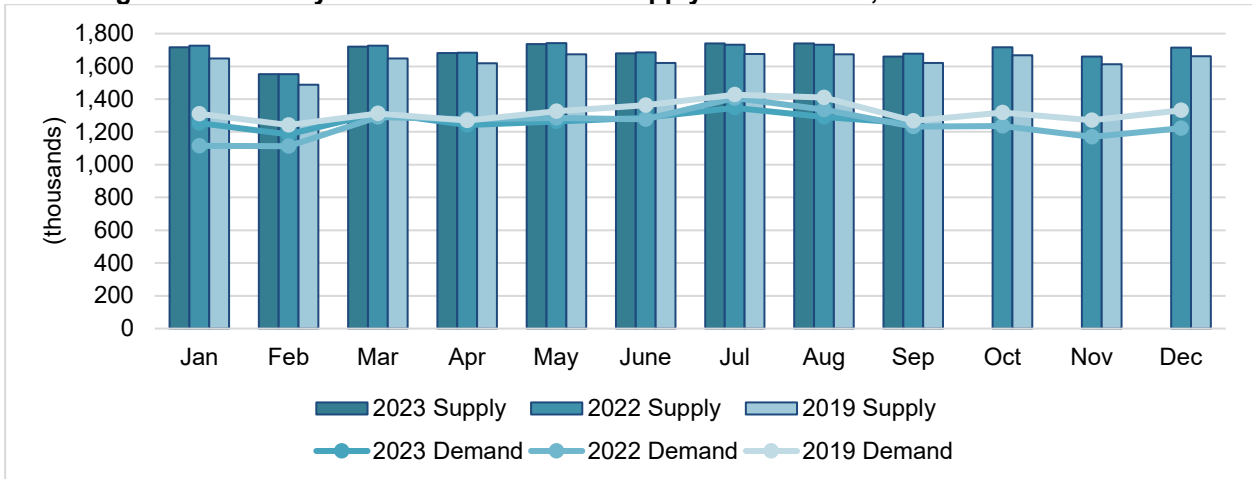
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2023 vs. 2022 vs. 2019



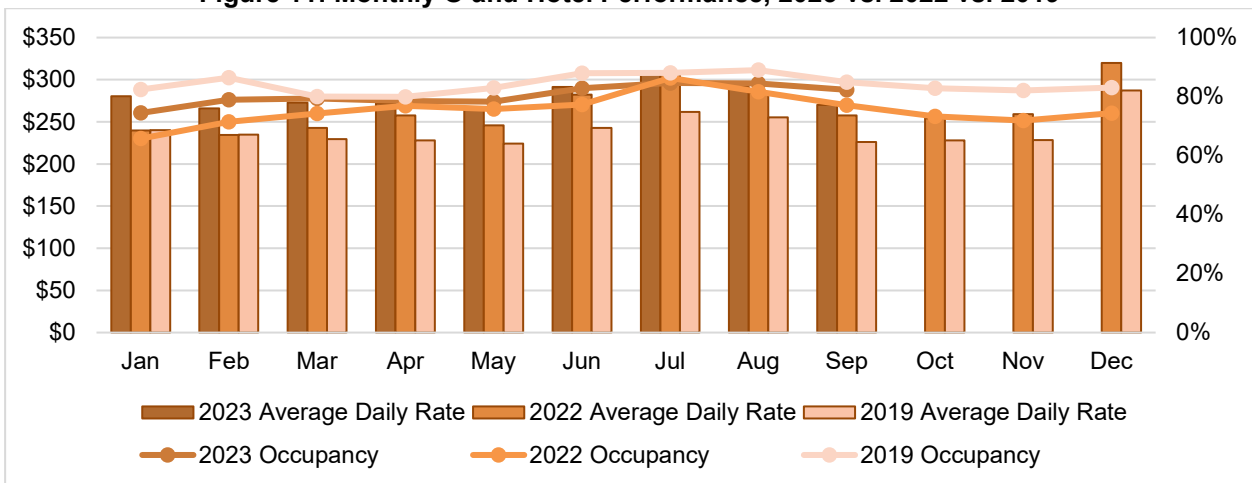
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



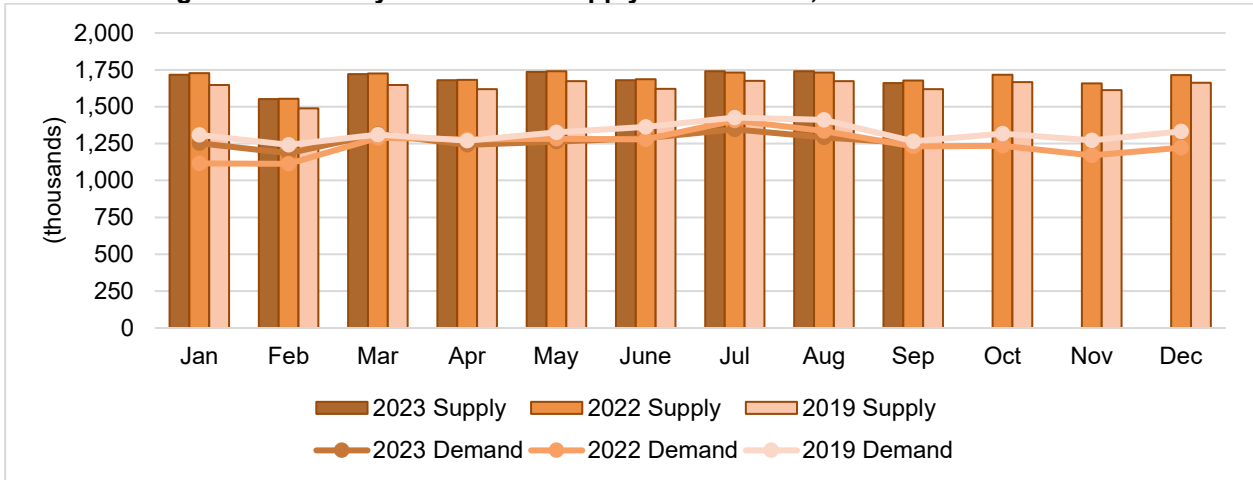
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Figure 11: Monthly O'ahu Hotel Performance, 2023 vs. 2022 vs. 2019



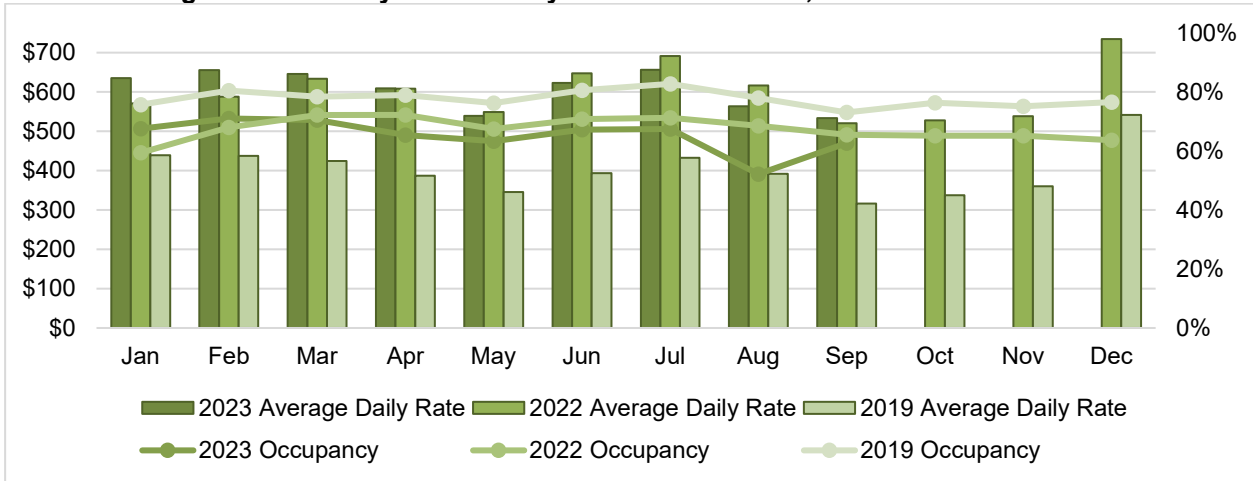
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



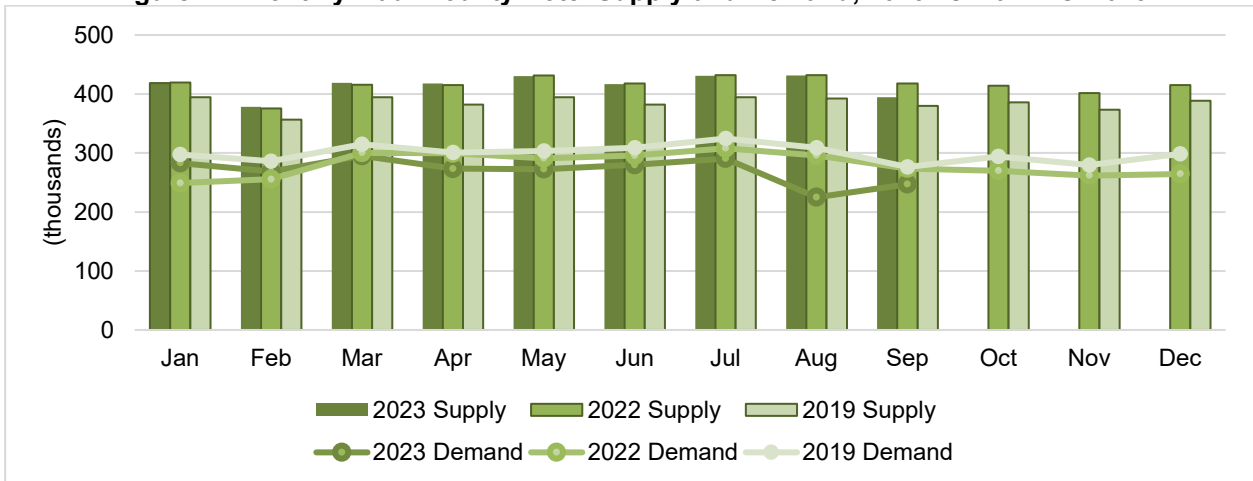
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Figure 13: Monthly Maui County Hotel Performance, 2023 vs. 2022 vs. 2019



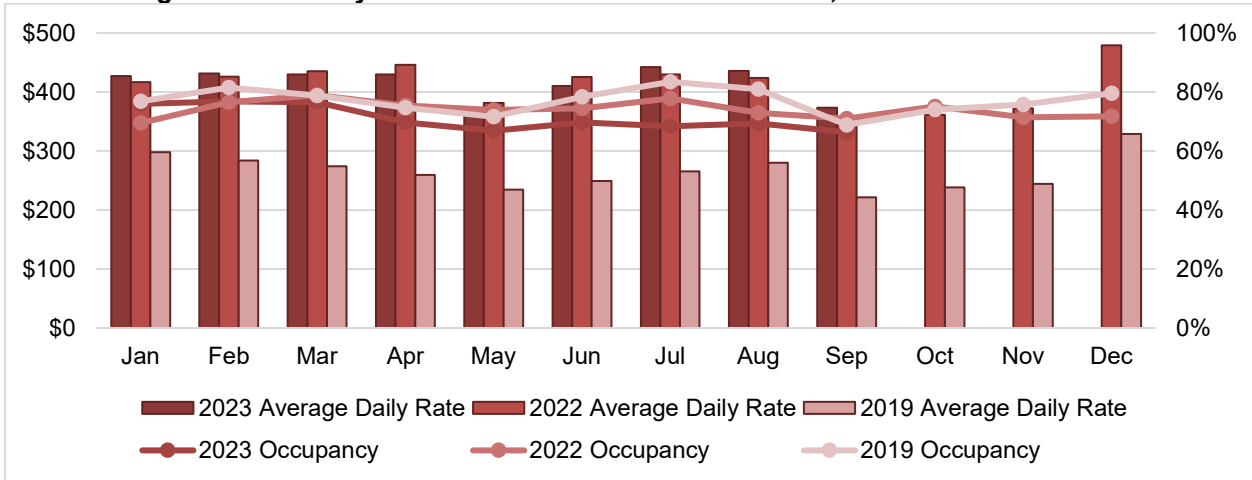
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



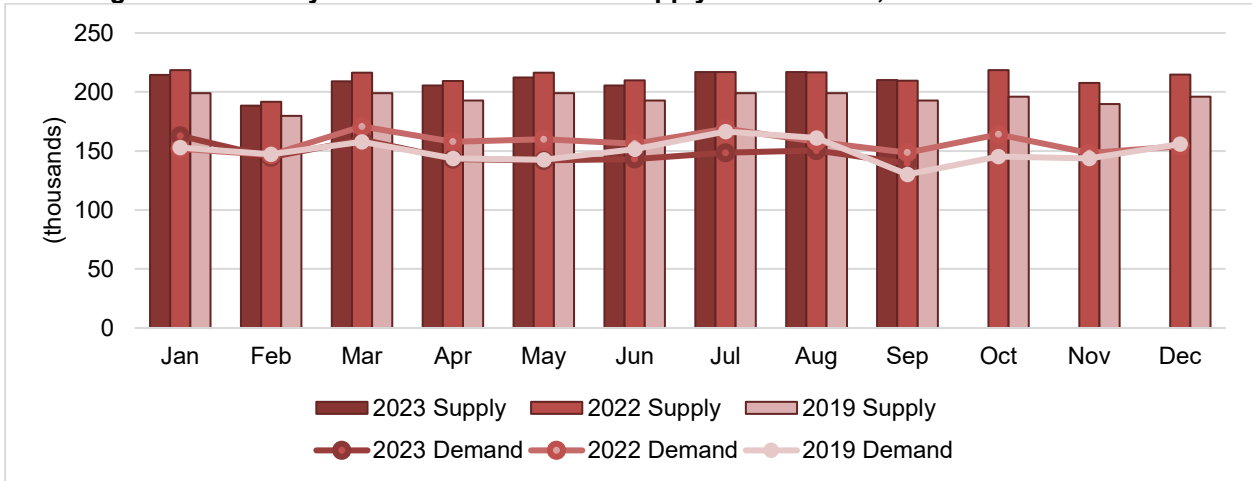
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2023 vs. 2022 vs. 2019



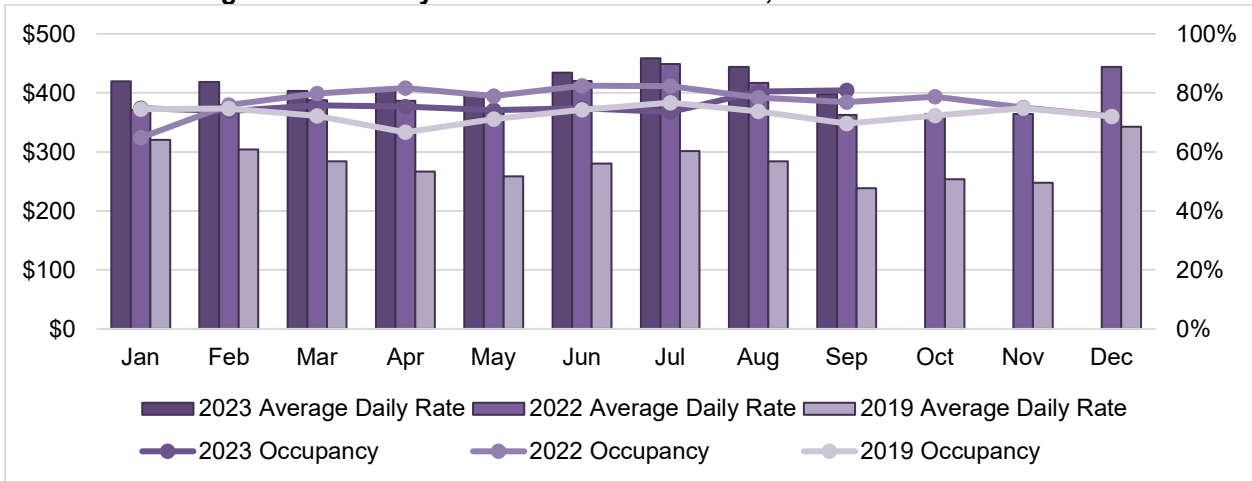
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2023 vs. 2022 vs. 2019



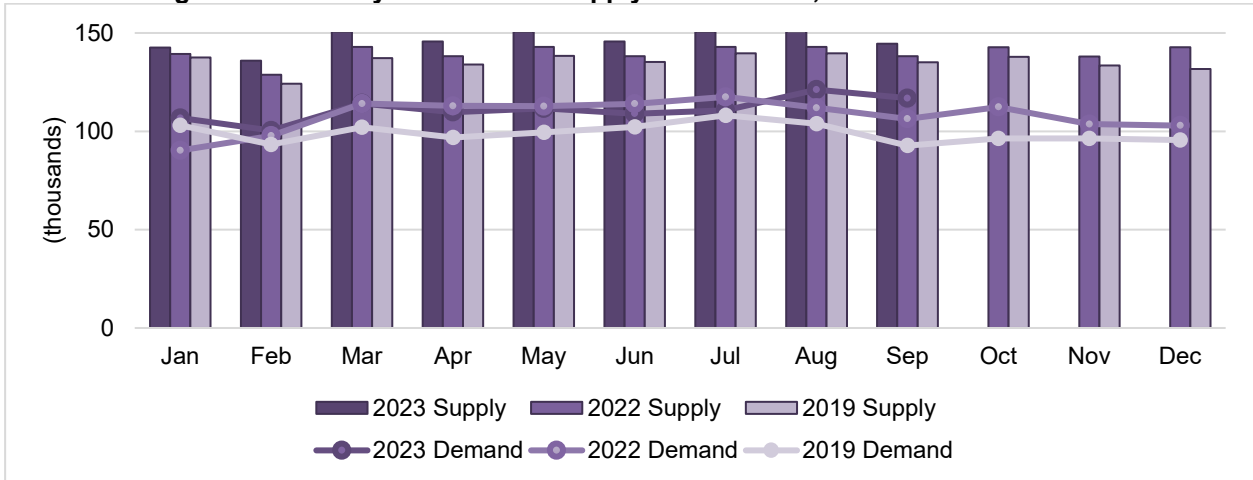
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Figure 17: Monthly Kaua'i Hotel Performance, 2023 vs. 2022 vs. 2019



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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 September 2023

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$285.08	3.4%
2	New York, NY	\$223.64	20.1%
3	San Diego, CA	\$162.97	5.0%
4	Boston, MA	\$161.51	13.9%
5	Miami, FL	\$160.54	-7.4%

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Figure 10: Top 5 U.S. Markets – Average Daily Rate – YTD September 2023

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$378.62	2.0%
2	New York, NY	\$279.06	8.7%
3	San Francisco/San Mateo, CA	\$225.77	6.4%
4	Miami, FL	\$222.65	-5.6%
5	Boston, MA	\$222.43	6.0%

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Figure 11: Top 5 U.S. Markets – Occupancy – YTD September 2023

Rank	Destination	Occupancy	Percentage Pt. Change
1	New York, NY	80.1%	7.6%
2	Las Vegas, NV	78.5%	4.7%
3	San Diego, CA	75.8%	1.5%
4	Hawaiian Islands	75.3%	1.0%
5	Orlando, FL	73.5%	0.5%

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Figure 12: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD September 2023

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$630.94	29.1%
2	Maui County	\$398.79	-3.6%
3	Maldives	\$356.69	-4.8%
4	Kaua'i	\$320.84	4.4%
5	Hawai'i Island	\$295.40	-4.0%
6	Aruba	\$276.47	13.5%
7	O'ahu	\$225.42	12.3%
8	Cabo San Lucas+	\$217.49	3.1%
9	Puerto Rico	\$216.17	13.5%
10	Cancun+	\$198.34	10.5%
11	Fiji	\$188.16	41.6%
12	Costa Rica	\$146.43	18.9%
13	Puerto Vallarta+	\$131.06	24.2%
14	Bali	\$96.83	117.6%
15	Phuket	\$96.59	114.9%

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Figure 13: Competitive Sun and Sea Destinations – Average Daily Rate – YTD September 2023

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$840.18	17.1%
2	Maui County	\$608.93	0.7%
3	Maldives	\$576.11	-1.5%
4	Kaua'i	\$418.97	6.3%
5	Hawai'i Island	\$415.91	0.8%
6	Aruba	\$414.20	11.3%
7	Cabo San Lucas+	\$382.37	4.3%
8	Puerto Rico	\$288.50	5.7%
9	O'ahu	\$279.98	6.4%
10	Cancun+	\$270.19	9.2%
11	Fiji	\$240.13	22.1%
12	Costa Rica	\$226.24	7.8%
13	Puerto Vallarta+	\$178.35	22.4%
14	Phuket	\$143.75	32.2%
15	Bali	\$137.53	33.6%

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Figure 14: Competitive Sun and Sea Destinations – Occupancy – YTD September 2023

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	80.5%	4.2%
2	Fiji	78.4%	10.8%
3	Kaua'i	76.6%	-1.4%
4	French Polynesia	75.1%	7.0%
5	Puerto Rico	74.9%	5.2%
6	Puerto Vallarta+	73.5%	1.0%
7	Cancun+	73.4%	0.8%
8	Hawai'i Island	71.0%	-3.5%
9	Bali	70.4%	27.2%
10	Phuket	67.2%	25.9%
11	Aruba	66.7%	1.3%
12	Maui County	65.5%	-2.9%
13	Costa Rica	64.7%	6.1%
14	Maldives	61.9%	-2.1%
15	Cabo San Lucas+	56.9%	-0.7%

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