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June 2025 Hawai'i Vacation Rental Performance Report

Vacation rentals across Hawai'i reported increases in supply and average daily rate (ADR), with lower demand and occupancy rate in June 2025 when compared to June 2024. In comparison to pre-pandemic June 2019, ADR was higher in June 2025 but vacation rental supply, demand and occupancy were lower.

In June 2025, the total monthly supply of statewide vacation rentals was 836,500 unit nights (+2.0% vs. 2024, -5.6% vs. 2019) and monthly demand was 390,400 unit nights (-6.9% vs. 2024, -40.2% vs. 2019) (Figures 1 and 2). This combination resulted in an average monthly unit occupancy of 46.7 percent (-4.4 percentage points vs. 2024, -27.0 percentage points vs. 2019) for June. Occupancy for Hawai'i's hotels was 74.3 percent in June 2025.

The ADR for vacation rental units statewide in June was \$398 (+24.6% vs. 2024, +95.8% vs. 2019). By comparison, the ADR for hotels was \$375 in June 2025. It is important to note that unlike hotels, units in vacation rentals are not necessarily available year-round or each day of the month and often accommodate a larger number of guests than traditional hotel rooms.

The data in DBEDT's Hawai'i Vacation Rental Performance Report specifically excludes units reported in DBEDT's Hawai'i Hotel Performance Report and Hawai'i Timeshare Quarterly Survey Report. A vacation rental is defined as the use of a rental house, condominium unit, private room in a private home, or shared room/space in a private home. This report does not determine or differentiate between units that are permitted or unpermitted. The legality of any given vacation rental unit is determined on a county basis.

Island Highlights

In June 2025, Maui County had the largest vacation rental supply at 266,300 available unit nights (+3.7% vs. 2024, -3.3% vs. 2019). Unit demand was 120,700 unit nights (-4.6% vs. 2024, -43.6% vs. 2019), resulting in 45.3 percent occupancy (-3.9 percentage points vs. 2024, -32.3 percentage points vs. 2019) and ADR at \$464 (+21.9% vs. 2024, +99.7% vs. 2019). For June 2025, Maui County hotels reported ADR at \$558 and occupancy of 63.5 percent.

O'ahu vacation rental supply was 224,700 available unit nights (+0.8% vs. 2024, -25.5% vs. 2019). Unit demand was 119,300 unit nights (-12.6% vs. 2024, -47.2% vs. 2019), resulting in 53.1 percent occupancy (-8.1 percentage points vs. 2024, -21.8 percentage

points vs. 2019) with ADR at \$337 (+26.1% vs. 2024, +95.4% vs. 2019). In comparison, O'ahu hotels reported ADR at \$290 and occupancy of 79.7 percent for June 2025.

The island of Hawai'i vacation rental supply was 208,600 available unit nights (-0.7% vs. 2024, +9.2% vs. 2019) in June. Unit demand was 82,400 unit nights (-7.8% vs. 2024, -33.5% vs. 2019), resulting in 39.5 percent occupancy (-3.0 percentage points vs. 2024, -25.4 percentage points vs. 2019) with ADR at \$336 (+30.4% vs. 2024, +107.6% vs. 2019). Hawai'i Island hotels reported ADR at \$432 and occupancy of 69.2 percent.

Kaua'i had the fewest number of available vacation rental unit nights in June at 136,900 (+4.8% vs. 2024, +16.1% vs. 2019). Unit demand was 68,100 unit nights (+1.5% vs. 2024, -23.9% vs. 2019), resulting in 49.7 percent occupancy (-1.6 percentage points vs. 2024, -26.2 percentage points vs. 2019) with ADR at \$464 (+18.0% vs. 2024, +72.4% vs. 2019). Kaua'i hotels reported ADR at \$440 and occupancy of 76.4 percent.

First Half 2025

For the first half of 2025, Hawai'i vacation rental supply was 4.8 million unit nights (+1.8% vs. 2024, -0.3% vs. 2019) and demand was 2.5 million unit nights (-0.8% vs. 2024, -29.7% vs. 2019). 2025 average daily unit rate was \$371 (+14.3% vs. 2024, +78.1% vs. 2019). Statewide vacation rental occupancy for the first half of 2025 was 53.4 percent (-2.6 percentage points vs. 2024, -29.5 percentage points vs. 2019). In comparison, statewide hotel ADR for the first half of 2025 was \$370 and occupancy was 74.4 percent.

Tables of vacation rental performance statistics, including data presented in the report are available for viewing online at: <http://dbedt.hawaii.gov/visitor/vacation-rental-performance/>

About the Hawai'i Vacation Rental Performance Report

The Hawai'i Vacation Rental Performance Report is produced using data compiled by Lighthouse Intelligence, Ltd. (formerly known as Transparent Intelligence, Inc.), which was selected by DBEDT as the provider for these data services.

The report includes data for properties that are listed on Airbnb, Booking.com, Vrbo and TripAdvisor. Data for units included in DBEDT's Hawai'i Hotel Performance Report and Hawai'i Timeshare Quarterly Report have been excluded from the Hawai'i Vacation Rental Performance Report. This report also does not determine or differentiate between units that are permitted or unpermitted. The legality of any given vacation rental unit is determined on a county basis. DBEDT does not support illegal vacation rentals.

Lighthouse enriches their occupancy and price calculations with reservation data provided by vacation rental software providers, online travel agencies and local property managers. Currently, the reservation systems data provided by data partners represent about 32.1 percent of the estimated total unique vacation rental properties in the State of Hawai'i. On a county level, reservation system data represents 28.5 percent of Maui County coverage; 37.7 percent of Honolulu County coverage; 34.4 percent of Hawai'i

County coverage; and 26.0 percent of Kaua'i County coverage of the estimated number of unique vacation rental properties.

For June 2025, the report included data for 34,339 units, representing 60,304 bedrooms in the Hawaiian Islands.

Figure 1: Hawai'i Vacation Rental Performance June 2025

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2025	2024	% Change	2025	2024	% Change	2025	2024	Percentage Pt. Change	2025	2024	% Change
State of Hawai'i	836,513	820,493	2.0%	390,417	419,362	-6.9%	46.7%	51.1%	-4.4%	\$398.25	\$319.66	24.6%
O'ahu	224,700	222,859	0.8%	119,285	136,450	-12.6%	53.1%	61.2%	-8.1%	\$337.46	\$267.70	26.1%
Waikīkī	137,057	129,690	5.7%	83,243	92,969	-10.5%	60.7%	71.7%	-10.9%	\$276.62	\$213.13	29.8%
Maui County	266,298	256,819	3.7%	120,689	126,508	-4.6%	45.3%	49.3%	-3.9%	\$463.72	\$380.49	21.9%
Wailea/Kīhei	120,310	117,669	2.2%	53,650	60,789	-11.7%	44.6%	51.7%	-7.1%	\$354.88	\$309.13	14.8%
Lahaina/Kā'anapali/ Nāpili/Kapalua	116,718	108,552	7.5%	56,319	52,967	6.3%	48.3%	48.8%	-0.5%	\$591.00	\$490.02	20.6%
Island of Hawai'i	208,602	210,131	-0.7%	82,350	89,325	-7.8%	39.5%	42.5%	-3.0%	\$335.89	\$257.57	30.4%
Kona	103,608	105,713	-2.0%	40,362	42,728	-5.5%	39.0%	40.4%	-1.5%	\$303.66	\$239.63	26.7%
Hilo/Honoka'a	44,601	45,196	-1.3%	17,885	19,812	-9.7%	40.1%	43.8%	-3.7%	\$204.75	\$153.21	33.6%
Kaua'i	136,913	130,684	4.8%	68,093	67,079	1.5%	49.7%	51.3%	-1.6%	\$464.13	\$393.36	18.0%

Source: Lighthouse Intelligence, Ltd. © Copyright 2025 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 2: Hawai'i Vacation Rental Performance June 2025 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2025	2019	% Change	2025	2019	% Change	2025	2019	Percentage Pt. Change	2025	2019	% Change
State of Hawai'i	836,513	885,949	-5.6%	390,417	653,059	-40.2%	46.7%	73.7%	-27.0%	\$398.25	\$203.35	95.8%
O'ahu	224,700	301,649	-25.5%	119,285	225,806	-47.2%	53.1%	74.9%	-21.8%	\$337.46	\$172.72	95.4%
Waikīkī	137,057	124,690	9.9%	83,243	96,770	-14.0%	60.7%	77.6%	-16.9%	\$276.62	\$146.54	88.8%
Maui County	266,298	275,399	-3.3%	120,689	213,881	-43.6%	45.3%	77.7%	-32.3%	\$463.72	\$232.24	99.7%
Wailea/Kīhei	120,310	132,984	-9.5%	53,650	104,251	-48.5%	44.6%	78.4%	-33.8%	\$354.88	\$221.03	60.6%
Lahaina/Kā'anapali/ Nāpili/Kapalua	116,718	108,768	7.3%	56,319	85,508	-34.1%	48.3%	78.6%	-30.4%	\$591.00	\$261.40	126.1%
Island of Hawai'i	208,602	191,023	9.2%	82,350	123,874	-33.5%	39.5%	64.8%	-25.4%	\$335.89	\$161.77	107.6%
Kona	103,608	93,559	10.7%	40,362	63,703	-36.6%	39.0%	68.1%	-29.1%	\$303.66	\$129.83	133.9%
Hilo/Honoka'a	44,601	34,831	28.0%	17,885	20,538	-12.9%	40.1%	59.0%	-18.9%	\$204.75	\$92.90	120.4%
Kaua'i	136,913	117,878	16.1%	68,093	89,498	-23.9%	49.7%	75.9%	-26.2%	\$464.13	\$269.15	72.4%

Source: Lighthouse Intelligence, Ltd. © Copyright 2025 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 3: Hawai'i Vacation Rental Performance Year-to-Date June 2025

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2025	2024	% Change	2025	2024	% Change	2025	2024	Percentage Pt. Change	2025	2024	% Change
State of Hawai'i	4,768,900	4,685,190	1.8%	2,545,456	2,566,521	-0.8%	53.4%	54.8%	-2.6%	\$370.80	\$324.40	14.3%
O'ahu	1,312,292	1,330,763	-1.4%	750,713	784,560	-4.3%	57.2%	59.0%	-3.0%	\$299.83	\$260.70	15.0%
Waikiki	794,272	779,536	1.9%	519,841	527,439	-1.4%	65.4%	67.7%	-3.3%	\$237.64	\$212.25	12.0%
North Shore	132,789	146,405	-9.3%	66,649	80,534	-17.2%	50.2%	55.0%	-8.8%	\$436.43	\$399.15	9.3%
Other Honolulu	104,302	114,615	-9.0%	36,160	41,365	-12.6%	34.7%	36.1%	-3.9%	\$263.69	\$194.07	35.9%
Leeward/Mākahe Side	146,088	142,413	2.6%	75,322	72,732	3.6%	51.6%	51.1%	1.0%	\$611.07	\$468.86	30.3%
Windward Side	101,562	107,454	-5.5%	37,688	45,629	-17.4%	37.1%	42.5%	-12.6%	\$363.22	\$333.50	8.9%
Ala Moana Area	27,835	31,060	-10.4%	12,824	13,472	-4.8%	46.1%	43.4%	6.2%	\$227.33	\$201.93	12.6%
Airport Area	5,444	9,280	-41.3%	2,229	3,389	-34.2%	40.9%	36.5%	12.1%	\$133.12	\$110.20	20.8%
Maui County	1,466,961	1,386,380	5.8%	789,117	777,872	1.4%	53.8%	56.1%	-4.1%	\$455.67	\$400.97	13.6%
Wailea/Kihei	647,937	628,791	3.0%	354,746	372,900	-4.9%	54.8%	59.3%	-7.7%	\$359.77	\$339.59	5.9%
Lahaina/Kā'anapali/ Nāpili/Kapalua	654,498	589,931	10.9%	355,630	320,877	10.8%	54.3%	54.4%	-0.1%	\$581.90	\$505.87	15.0%
Mā'alaea	65,094	66,846	-2.6%	35,085	35,884	-2.2%	53.9%	53.7%	0.4%	\$339.38	\$287.15	18.2%
Kahului/Wailuku	41,285	44,126	-6.4%	19,733	21,906	-9.9%	47.8%	49.6%	-3.7%	\$349.86	\$302.76	15.6%
Kula/Makawao Area	14,317	11,083	29.2%	5,800	5,333	8.8%	40.5%	48.1%	-15.8%	\$294.71	\$260.95	12.9%
Hāna Area	9,914	9,677	2.4%	6,768	6,654	1.7%	68.3%	68.8%	-0.7%	\$389.52	\$393.22	-0.9%
<i>Island of Maui</i>	<i>1,433,045</i>	<i>1,350,454</i>	<i>6.1%</i>	<i>777,762</i>	<i>763,554</i>	<i>1.9%</i>	<i>54.3%</i>	<i>56.5%</i>	<i>-4.0%</i>	<i>\$459.94</i>	<i>\$405.87</i>	<i>13.3%</i>
<i>Moloka'i</i>	<i>32,892</i>	<i>34,965</i>	<i>-5.9%</i>	<i>11,026</i>	<i>13,846</i>	<i>-20.4%</i>	<i>33.5%</i>	<i>39.6%</i>	<i>-15.3%</i>	<i>\$159.90</i>	<i>\$136.00</i>	<i>17.6%</i>
<i>Lāna'i</i>	<i>1,024</i>	<i>961</i>	<i>6.6%</i>	<i>329</i>	<i>472</i>	<i>-30.3%</i>	<i>32.1%</i>	<i>49.1%</i>	<i>-34.6%</i>	<i>\$270.41</i>	<i>\$258.06</i>	<i>4.8%</i>
Island of Hawai'i	1,177,656	1,196,058	-1.5%	577,028	594,888	-3.0%	49.0%	49.7%	-1.5%	\$302.77	\$260.40	16.3%
Kona	583,985	600,260	-2.7%	283,758	297,500	-4.6%	48.6%	49.6%	-2.0%	\$286.60	\$254.42	12.6%
Kohala/Waimea/Kawaihae	262,680	252,768	3.9%	126,409	129,008	-2.0%	48.1%	51.0%	-5.7%	\$503.58	\$413.94	21.7%
Hilo/Honoka'a	260,117	266,566	-2.4%	129,348	132,230	-2.2%	49.7%	49.6%	0.2%	\$178.06	\$151.40	17.6%
Volcano Area	59,688	63,960	-6.7%	32,987	30,942	6.6%	55.3%	48.4%	14.2%	\$179.66	\$163.41	9.9%
Nā'ālehu /Ka'ū	11,186	12,504	-10.5%	4,526	5,208	-13.1%	40.5%	41.7%	-2.9%	\$169.71	\$142.22	19.3%
Kaua'i	811,991	771,989	5.2%	428,598	409,201	4.7%	52.8%	53.0%	-0.4%	\$430.41	\$394.00	9.2%
Princeville/Hanalei	358,231	341,715	4.8%	184,986	163,271	13.3%	51.6%	47.8%	8.1%	\$399.88	\$367.98	8.7%
Po'ipū/Kukui'ula	223,578	214,829	4.1%	132,605	134,190	-1.2%	59.3%	62.5%	-5.0%	\$544.11	\$484.45	12.3%
Wailua/Kapa'a	130,805	136,454	-4.1%	71,171	73,912	-3.7%	54.4%	54.2%	0.5%	\$345.31	\$327.40	5.5%
Līhu'e	93,323	72,964	27.9%	36,022	34,510	4.4%	38.6%	47.3%	-18.4%	\$332.32	\$313.84	5.9%
Kalāheo/Waimea	5,873	5,845	0.5%	3,814	3,318	14.9%	64.9%	56.8%	14.4%	\$472.33	\$333.96	41.4%

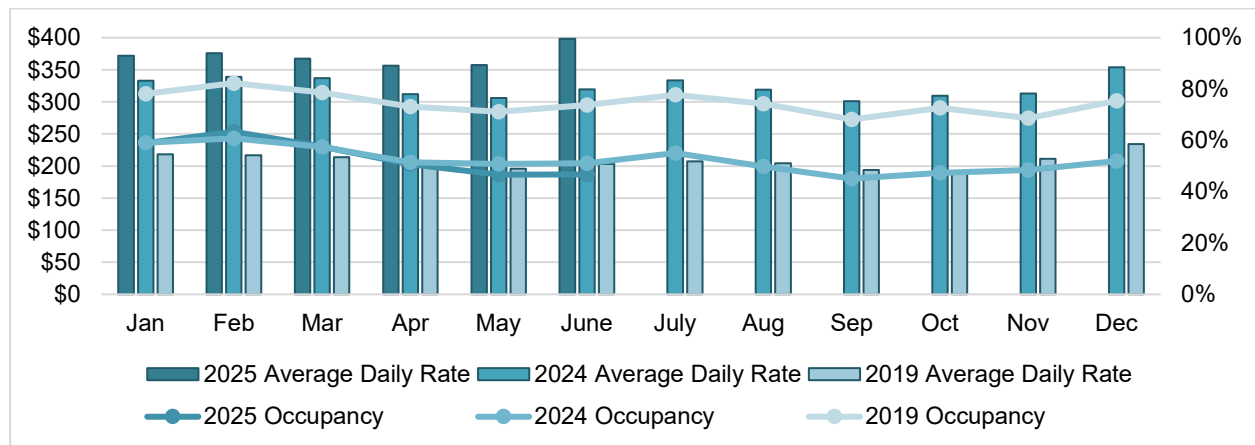
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Figure 4: Hawai'i Vacation Rental Performance Year-to-Date June 2025 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2025	2019	% Change	2025	2019	% Change	2025	2019	Percentage Pt. Change	2025	2019	% Change
State of Hawai'i	4,768,900	4,784,725	-0.3%	2,545,456	3,621,887	-29.7%	53.4%	75.7%	-29.5%	\$370.80	\$208.15	78.1%
O'ahu	1,312,292	1,668,743	-21.4%	750,713	1,246,657	-39.8%	57.2%	74.7%	-23.4%	\$299.83	\$163.09	83.8%
Waikīkī	794,272	663,736	19.7%	519,841	516,464	0.7%	65.4%	77.8%	-15.9%	\$237.64	\$144.82	64.1%
North Shore	132,789	269,186	-50.7%	66,649	199,875	-66.7%	50.2%	74.3%	-32.4%	\$436.43	\$187.37	132.9%
Other Honolulu	104,302	247,452	-57.8%	36,160	173,857	-79.2%	34.7%	70.3%	-50.7%	\$263.69	\$155.77	69.3%
Leeward/Mākaaha Side	146,088	198,363	-26.4%	75,322	141,844	-46.9%	51.6%	71.5%	-27.9%	\$611.07	\$192.76	217.0%
Windward Side	101,562	243,587	-58.3%	37,688	181,496	-79.2%	37.1%	74.5%	-50.2%	\$363.22	\$182.83	98.7%
Ala Moana Area	27,835	26,117	6.6%	12,824	18,463	-30.5%	46.1%	70.7%	-34.8%	\$227.33	\$122.33	85.8%
Airport Area	5,444	20,302	-73.2%	2,229	14,658	-84.8%	40.9%	72.2%	-43.3%	\$133.12	\$82.16	62.0%
Maui County	1,466,961	1,423,959	3.0%	789,117	1,143,916	-31.0%	53.8%	80.3%	-33.0%	\$455.67	\$257.32	77.1%
Wailea/Kihei	647,937	668,947	-3.1%	354,746	538,663	-34.1%	54.8%	80.5%	-32.0%	\$359.77	\$251.32	43.2%
Lahaina/Kā'anapali/ Nāpili/Kapalua	654,498	569,974	14.8%	355,630	461,076	-22.9%	54.3%	80.9%	-32.8%	\$581.90	\$285.97	103.5%
Mā'alaea	65,094	55,564	17.2%	35,085	46,173	-24.0%	53.9%	83.1%	-35.1%	\$339.38	\$205.51	65.1%
Kahului/Wailuku	41,285	56,531	-27.0%	19,733	45,283	-56.4%	47.8%	80.1%	-40.3%	\$349.86	\$191.88	82.3%
Kula/Makawao Area	14,317	14,860	-3.7%	5,800	11,371	-49.0%	40.5%	76.5%	-47.1%	\$294.71	\$191.51	53.9%
Hāna Area	9,914	12,485	-20.6%	6,768	10,724	-36.9%	68.3%	85.9%	-20.5%	\$389.52	\$270.10	44.2%
<i>Island of Maui</i>	1,433,045	1,378,361	4.0%	777,762	1,113,290	-30.1%	54.3%	80.8%	-32.8%	\$459.94	\$260.92	76.3%
<i>Moloka'i</i>	32,892	43,103	-23.7%	11,026	29,202	-62.2%	33.5%	67.7%	-50.5%	\$159.90	\$120.84	32.3%
<i>Lāna'i</i>	1,024	2,495	-59.0%	329	1,424	-76.9%	32.1%	57.1%	-43.7%	\$270.41	\$241.53	12.0%
Island of Hawai'i	1,177,656	1,058,018	11.3%	577,028	726,531	-20.6%	49.0%	68.7%	-28.6%	\$302.77	\$164.90	83.6%
Kona	583,985	514,780	13.4%	283,758	379,502	-25.2%	48.6%	73.7%	-34.1%	\$286.60	\$136.66	109.7%
Kohala/Waimea/Kawaihae	262,680	259,497	1.2%	126,409	178,333	-29.1%	48.1%	68.7%	-30.0%	\$503.58	\$290.20	73.5%
Hilo/Honoka'a	260,117	202,709	28.3%	129,348	122,146	5.9%	49.7%	60.3%	-17.5%	\$178.06	\$89.67	98.6%
Volcano Area	59,688	62,070	-3.8%	32,987	35,454	-7.0%	55.3%	57.1%	-3.2%	\$179.66	\$113.62	58.1%
Nā'ālehu /Ka'ū	11,186	18,962	-41.0%	4,526	11,096	-59.2%	40.5%	58.5%	-30.9%	\$169.71	\$108.79	56.0%
Kaua'i	811,991	634,005	28.1%	428,598	504,783	-15.1%	52.8%	79.6%	-33.7%	\$430.41	\$270.25	59.3%
Princeville/Hanalei	358,231	252,292	42.0%	184,986	203,699	-9.2%	51.6%	80.7%	-36.0%	\$399.88	\$265.94	50.4%
Po'ipū/Kukui'ula	223,578	229,095	-2.4%	132,605	179,404	-26.1%	59.3%	78.3%	-24.3%	\$544.11	\$319.27	70.4%
Wailua/Kapa'a	130,805	104,587	25.1%	71,171	83,350	-14.6%	54.4%	79.7%	-31.7%	\$345.31	\$202.37	70.6%
Līhu'e	93,323	35,952	159.6%	36,022	28,779	25.2%	38.6%	80.0%	-51.8%	\$332.32	\$197.29	68.4%
Kalāheo/Waimea	5,873	11,870	-50.5%	3,814	9,447	-59.6%	64.9%	79.6%	-18.4%	\$472.33	\$254.45	85.6%

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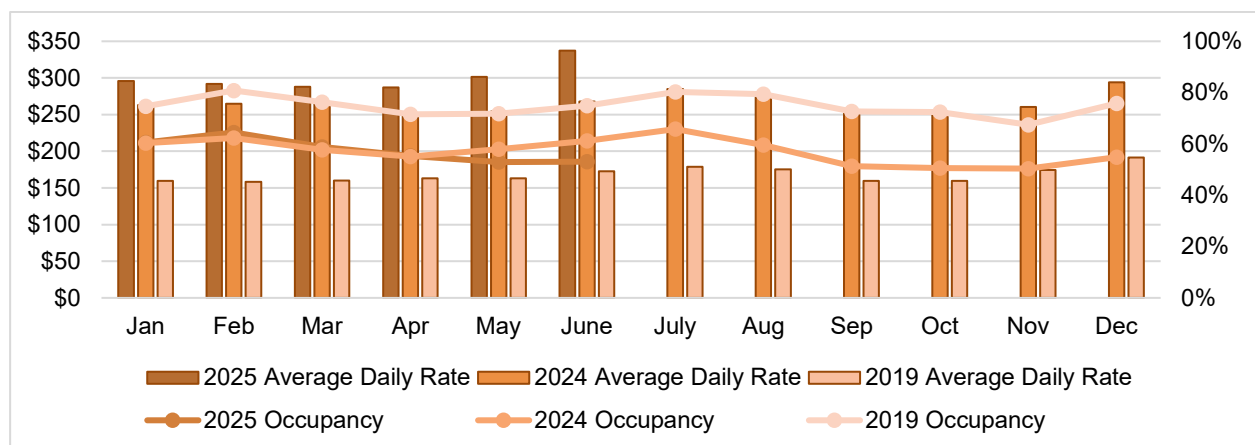
Figure 5: Monthly State of Hawai'i Vacation Rental Performance - 2025 vs. 2024 vs. 2019



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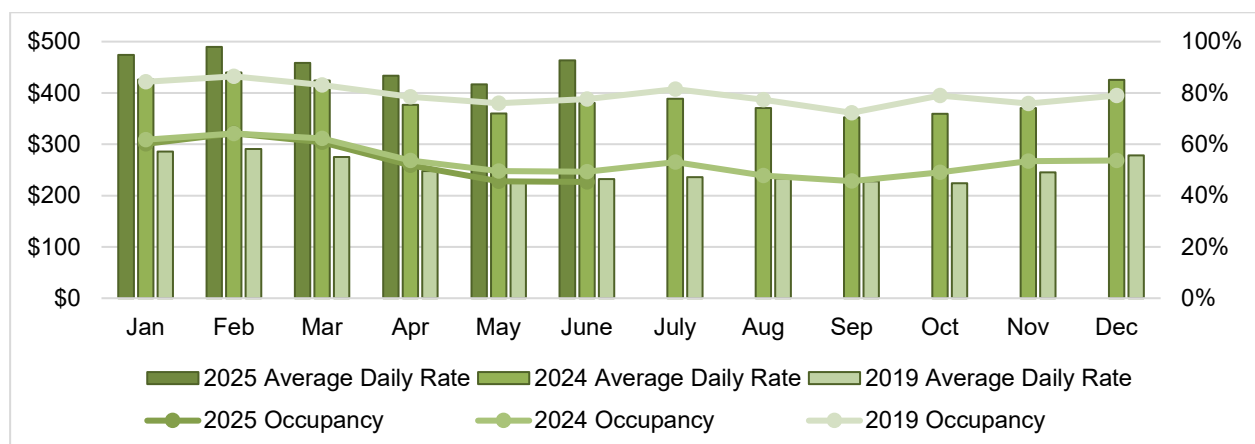
Figure 6: Monthly O'ahu Vacation Rental Performance - 2025 vs. 2024 vs. 2019



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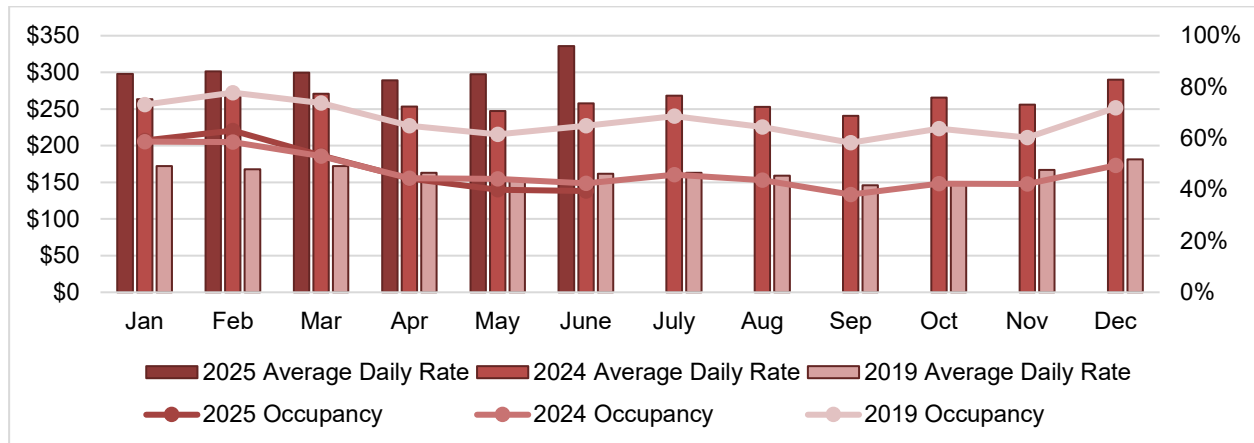
Figure 7: Monthly Maui County Vacation Rental Performance - 2025 vs. 2024 vs. 2019



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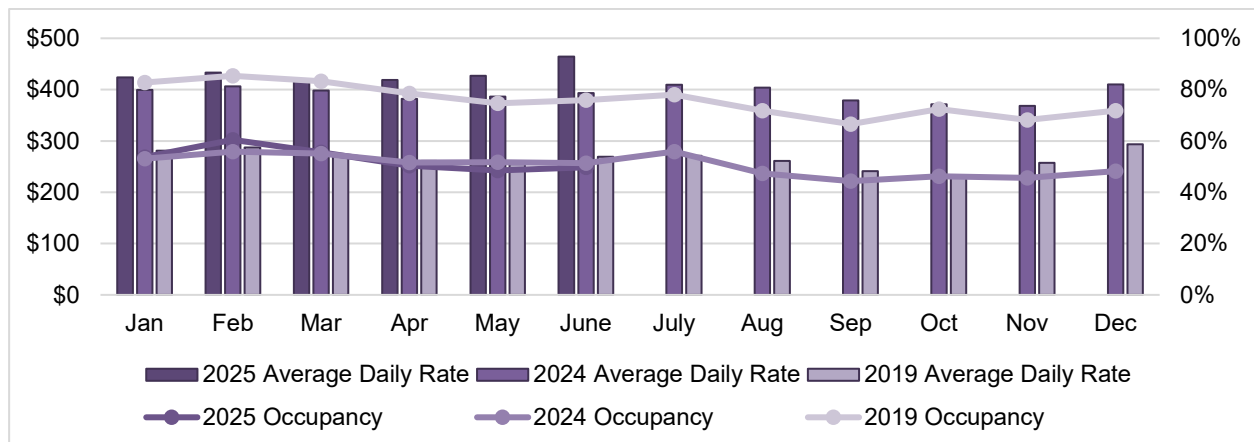
Figure 8: Monthly Island of Hawai'i Vacation Rental Performance - 2025 vs. 2024 vs. 2019



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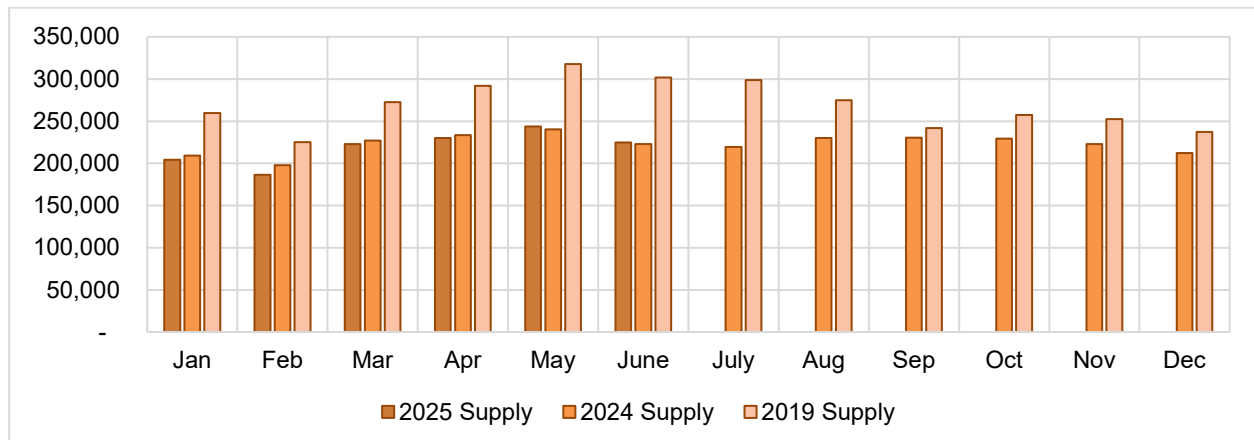
Figure 9: Monthly Kaua'i Vacation Rental Performance - 2025 vs. 2024 vs. 2019



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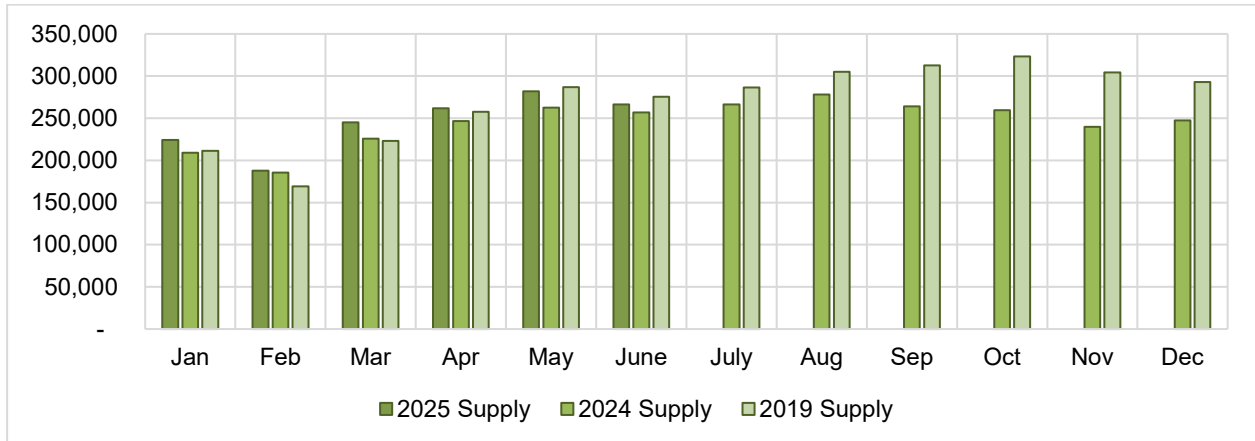
Figure 10: Monthly O'ahu Unit Night Supply - 2025 vs. 2024 vs. 2019



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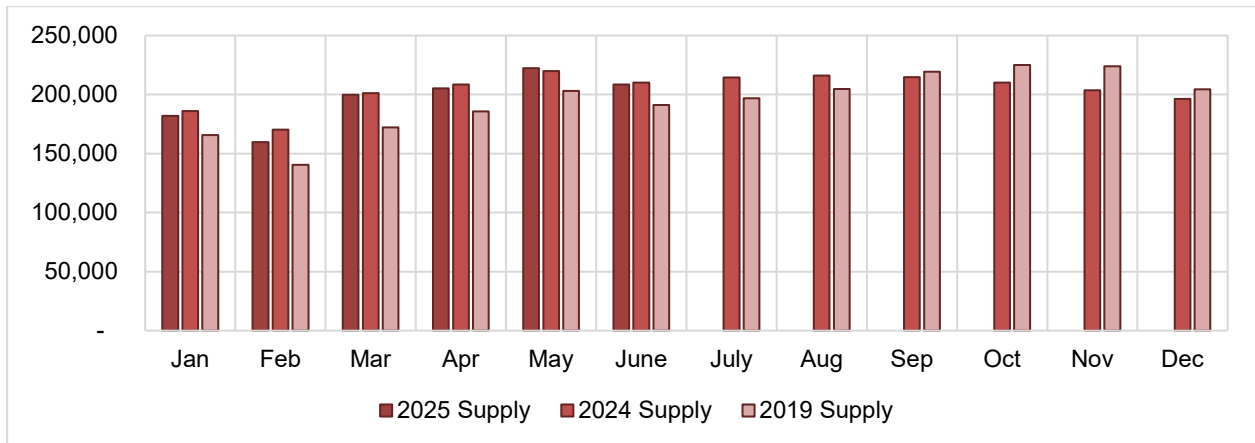
Figure 11: Monthly Maui County Unit Night Supply - 2025 vs. 2024 vs. 2019



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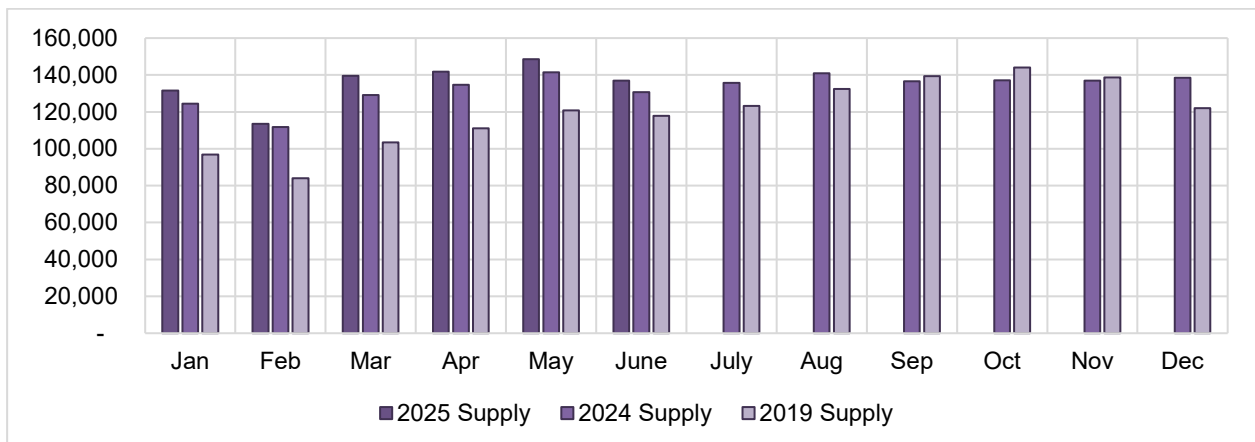
Figure 12: Monthly Island of Hawai'i Unit Night Supply - 2025 vs. 2024 vs. 2019



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Figure 13: Monthly Kaua'i Unit Night Supply - 2025 vs. 2024 vs. 2019



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