



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

March 2026 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported slightly lower average daily rate (ADR), occupancy and revenue per available room (RevPAR) in March 2026 compared to March 2025.

Statewide RevPAR in March 2026 was \$280 (-0.7%), with ADR at \$376 (-0.1%) and occupancy of 74.5 percent (-0.5 percentage points) compared to March 2025 (Figure 1). In March 2026, two Kona low storm systems brought widespread flooding and landslides to the State, disrupting scheduled flights and contributing to a slight decline in hotel occupancy rates.

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 2026, the survey included 163 properties representing 47,747 rooms, or 83.8 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 \$494.3 million (-0.6%) in March 2026. Room demand was 1.31 million room nights (-0.5%) and room supply was 1.77 million room nights (+0.1%) (Figure 2).

Luxury Class properties earned RevPAR of \$517 (-1.2%), with ADR at \$745 (+2.8%) and occupancy of 69.3 percent (-2.8 percentage points). Midscale & Economy Class properties earned RevPAR of \$176 (-4.6%) with ADR at \$225 (-5.4%) and occupancy of 78.1 percent (+0.7 percentage points).

Maui County hotels continued to be impacted by the August 8, 2023, wildfires but still led the counties in March 2026 RevPAR due to comparatively higher ADR. Maui County hotels achieved RevPAR of \$381 (-2.4%), with ADR at \$561 (-2.8%) and occupancy of 68.0 percent (+0.3 percentage points). Maui's luxury resort region of Wailea had RevPAR of \$594 (-3.3%), with ADR at \$772 (-2.9%) and occupancy of 76.9 percent (-0.4 percentage points). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$294 (-4.0%), ADR at \$453 (-3.4%) and occupancy of 64.8 percent (-0.4 percentage points).

Kaua'i hotels earned RevPAR at \$332 (+3.6%), with ADR at \$433 (+3.7%) and occupancy of 76.6 percent (-0.1 percentage points).

Hotels on the island of Hawai'i reported RevPAR at \$355 (+3.5%), with ADR at \$485 (+7.2%), and occupancy of 73.2 percent (-2.6 percentage points). Kohala Coast hotels earned RevPAR of \$505 (+5.6%), with ADR at \$689 (+10.4%), and occupancy of 73.2 percent (-3.4 percentage points).

O'ahu hotels reported RevPAR of \$212 (-2.0%) in March, ADR at \$274 (-1.6%) and occupancy of 77.2 percent (-0.3 percentage points). Waikīkī hotels earned RevPAR of \$198 (-1.8%), with ADR at \$256 (-1.2%) and occupancy of 77.4 percent (-0.4 percentage points).

First Quarter 2026

In the first quarter of 2026, Hawai'i's hotels earned \$290 in RevPAR (+0.8%), with ADR at \$380 (+0.2%) and occupancy of 76.4 percent (+0.5 percentage points) (Figure 3).

Total statewide hotel revenues for the first quarter of 2026 were \$1.5 billion (+0.9%). Room supply was 5.1 million room nights (0.0%), and room demand was 3.9 million room nights (+0.7%) (Figure 4).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest first quarter 2026 RevPAR at \$290 (+0.8%), followed by Miami, Florida at \$260 (+12.1%) and San Francisco/San Mateo, California at \$204 (+31.2%) (Figure 15).

The Hawaiian Islands led the U.S. markets in first quarter 2026 ADR at \$380 (+0.2%), followed by Miami, Florida at \$312 (+10.8%) and San Francisco/San Mateo, California at \$292 (+17.5%) (Figure 16).

Miami, Florida topped the country in occupancy at 83.6 percent (+0.9 percentage points), followed by Phoenix, Arizona at 78.6 percent (+2.5 percentage points) and Orlando, Florida at 78.4% (+1.3 percentage points) (Figure 17). The Hawaiian Islands ranked sixth at 76.4 percent (+0.5 percentage points) (Jaycie, did you want to expand Figure 17 to include Hawaiian island, sixth at 76.4%).

Comparison to International Markets

Hotels in the Maldives ranked highest for first quarter 2026 RevPAR for international "sun and sea" destinations at \$630 (+5.8%), followed by Aruba (\$500, +16.4%). Maui County (\$401, +2.6%), Hawai'i Island (\$372, +5.4%), Kaua'i (\$332, +2.8%), and O'ahu (\$218, -2.5%) ranked fourth, sixth, eighth, and twelfth, respectively (Figure 18).

Hotels in the Maldives led in first quarter 2026 ADR at \$821 (+7.0%), followed by French Polynesia (\$697, +16.5%) and Aruba (\$607, +12.5%). Maui County (\$556, -4.9%), Hawai'i Island (\$488, +7.6%), Kaua'i (\$432, +3.9%), and O'ahu (\$279, -1.4%) ranked sixth, seventh, eighth, and twelfth, respectively (Figure 19).

Puerto Rico led in occupancy for "sun and sea" destinations at 83.9 percent (+6.2 percentage points), followed by the Bahamas (83.4%, +7.2 percentage points) and Phuket, Thailand (83.2%, +1.5 percentage points). O'ahu (78.2%, -0.9%), Kaua'i (76.9%, -0.8%), Hawai'i Island (76.2%, -1.5 percentage points) and Maui County (72.2%, +5.3 percentage points) ranked sixth, eighth, tenth, and twelfth, respectively (Figure 20).

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 2026, the survey included 163 properties representing 47,747 rooms, or 83.8 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 29,646 rooms (94.3%); 38 properties in the County of Maui, representing 9,397 rooms (69.3%); 21 properties on the island of Hawai'i, representing 5,335 rooms (79.4%); and 21 properties on Kaua'i, representing 3,369 rooms (64.5%).

About the State of Hawai'i Department of Business, Economic Development & Tourism

The State of Hawai'i Department of Business, Economic Development & Tourism (DBEDT) is Hawai'i's resource center for economic and statistical data, business development opportunities, energy and conservation information, as well as foreign trade advantages. DBEDT's mission is to achieve a Hawai'i economy that embraces innovation and is globally competitive, dynamic and productive, providing opportunities for all Hawai'i's citizens. Through its attached agencies, the department fosters planned community development, creates affordable workforce housing units in high-quality living environments and promotes innovation sector job growth.

Figure 1: Hawai'i Hotel Performance March 2026

	Occupancy %			Average Daily Rate			RevPAR		
	2026	2025	Percentage Pt. Change	2026	2025	% Change	2026	2025	% Change
State of Hawai'i	74.5%	74.9%	-0.5%	\$376.00	\$376.40	-0.1%	\$280.02	\$282.07	-0.7%
Luxury Class	69.3%	72.1%	-2.8%	\$745.28	\$725.18	2.8%	\$516.78	\$523.06	-1.2%
Upper Upscale Class	78.0%	76.7%	1.3%	\$342.05	\$341.38	0.2%	\$266.96	\$261.97	1.9%
Upscale Class	71.9%	73.2%	-1.3%	\$235.36	\$247.16	-4.8%	\$169.24	\$180.94	-6.5%
Upper Midscale Class	72.5%	74.8%	-2.3%	\$197.55	\$198.33	-0.4%	\$143.24	\$148.28	-3.4%
Midscale & Economy Class	78.1%	77.4%	0.7%	\$225.34	\$238.14	-5.4%	\$175.97	\$184.40	-4.6%
O'ahu	77.2%	77.5%	-0.3%	\$274.19	\$278.64	-1.6%	\$211.64	\$216.05	-2.0%
Waikiki	77.4%	77.8%	-0.4%	\$256.33	\$259.58	-1.2%	\$198.39	\$201.97	-1.8%
Other O'ahu	76.1%	76.2%	0.0%	\$367.31	\$378.48	-3.0%	\$279.62	\$288.23	-3.0%
O'ahu Luxury	68.6%	71.5%	-2.9%	\$488.23	\$473.06	3.2%	\$334.90	\$338.30	-1.0%
O'ahu Upper Upscale	80.8%	78.7%	2.1%	\$281.04	\$288.09	-2.4%	\$226.99	\$226.60	0.2%
O'ahu Upscale	75.2%	78.9%	-3.7%	\$200.59	\$208.00	-3.6%	\$150.84	\$164.20	-8.1%
O'ahu Upper Midscale	76.6%	78.6%	-2.0%	\$154.63	\$164.00	-5.7%	\$118.47	\$128.95	-8.1%
O'ahu Midscale & Economy	80.4%	80.0%	0.4%	\$135.16	\$144.83	-6.7%	\$108.60	\$115.83	-6.2%
Maui County	68.0%	67.7%	0.3%	\$560.98	\$577.19	-2.8%	\$381.38	\$390.90	-2.4%
Wailea	76.9%	77.3%	-0.4%	\$772.40	\$795.20	-2.9%	\$593.92	\$614.33	-3.3%
Lahaina/Kā'anapali/Kapalua	64.8%	65.3%	-0.4%	\$452.82	\$468.58	-3.4%	\$293.55	\$305.75	-4.0%
Other Maui County	71.5%	70.5%	1.0%	\$669.60	\$690.54	-3.0%	\$478.63	\$486.94	-1.7%
Maui County Luxury	67.5%	71.0%	-3.5%	\$981.10	\$992.40	-1.1%	\$662.14	\$704.99	-6.1%
Maui County Upper Upscale & Upscale	68.2%	66.7%	1.5%	\$426.95	\$435.96	-2.1%	\$291.12	\$290.79	0.1%
Island of Hawai'i	73.2%	75.8%	-2.6%	\$485.14	\$452.35	7.2%	\$355.19	\$343.07	3.5%
Kohala Coast	73.2%	76.6%	-3.4%	\$689.36	\$624.30	10.4%	\$504.84	\$478.12	5.6%
Kauai	76.6%	76.7%	-0.1%	\$432.91	\$417.60	3.7%	\$331.66	\$320.22	3.6%

Source: STR, Inc. © Copyright 2026 State of Hawai'i Department of Business, Economic Development & Tourism

Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals. Please note that STR changed categories for some properties starting January 2026. 2025 data may differ from previously published reports.

Figure 2: Hawai'i Hotel Performance by Measure March 2026

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2026	2025	% Change	2026	2025	% Change	2026	2025	% Change
State of Hawai'i	1,765.4	1,763.2	0.1%	1,314.7	1,321.3	-0.5%	494.3	497.3	-0.6%
O'ahu	974.7	974.2	0.0%	752.3	755.4	-0.4%	206.3	210.5	-2.0%
Waikiki	815.6	815.2	0.1%	631.3	634.3	-0.5%	161.8	164.6	-1.7%
Maui County	420.6	416.3	1.0%	286.0	281.9	1.4%	160.4	162.7	-1.4%
Wailea	79.2	79.1	0.1%	60.9	61.1	-0.4%	47.0	48.6	-3.2%
Lahaina/Kā'anapali/ Kapalua	221.0	220.7	0.2%	143.3	144.0	-0.5%	64.9	67.5	-3.8%
Island of Hawai'i	208.2	210.3	-1.0%	152.4	159.5	-4.4%	73.9	72.1	2.5%
Kohala Coast	89.4	89.1	0.3%	65.5	68.3	-4.0%	45.2	42.6	6.0%
Kauai	161.9	162.3	-0.3%	124.0	124.5	-0.4%	53.7	52.0	3.3%

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Figure 3: Hawai'i Hotel Performance Year-to-Date March 2026

	Occupancy % Percentage Pt.			Average Daily Rate			RevPAR		
	2026	2025	Change	2026	2025	% Change	2026	2025	% Change
State of Hawai'i	76.4%	75.9%	0.5%	\$379.65	\$378.91	0.2%	\$290.10	\$287.66	0.8%
Luxury Class	71.7%	72.1%	-0.4%	\$742.59	\$723.58	2.6%	\$532.62	\$521.70	2.1%
Upper Upscale Class	79.1%	77.2%	1.9%	\$346.92	\$345.53	0.4%	\$274.55	\$266.76	2.9%
Upscale Class	75.3%	76.0%	-0.7%	\$240.55	\$255.72	-5.9%	\$181.13	\$194.45	-6.9%
Upper Midscale Class	74.6%	75.8%	-1.2%	\$204.63	\$204.93	-0.1%	\$152.71	\$155.41	-1.7%
Midscale & Economy Class	79.4%	78.9%	0.5%	\$232.08	\$240.97	-3.7%	\$184.27	\$190.19	-3.1%
O'ahu	78.2%	79.1%	-0.9%	\$278.66	\$282.72	-1.4%	\$217.86	\$223.50	-2.5%
Waikiki	78.2%	79.5%	-1.3%	\$262.63	\$266.88	-1.6%	\$205.37	\$212.08	-3.2%
Other O'ahu	78.1%	77.0%	1.1%	\$360.98	\$366.53	-1.5%	\$281.92	\$282.08	-0.1%
O'ahu Luxury	70.2%	72.6%	-2.4%	\$495.14	\$484.06	2.3%	\$347.47	\$351.48	-1.1%
O'ahu Upper Upscale	80.4%	79.7%	0.6%	\$285.33	\$291.12	-2.0%	\$229.31	\$232.10	-1.2%
O'ahu Upscale	79.6%	82.2%	-2.7%	\$202.61	\$210.17	-3.6%	\$161.19	\$172.83	-6.7%
O'ahu Upper Midscale	77.6%	79.6%	-2.1%	\$161.25	\$168.30	-4.2%	\$125.06	\$133.99	-6.7%
O'ahu Midscale & Economy	81.1%	81.9%	-0.8%	\$140.48	\$149.37	-6.0%	\$113.96	\$122.34	-6.8%
Maui County	72.2%	66.9%	5.3%	\$555.61	\$584.10	-4.9%	\$401.14	\$391.01	2.6%
Wailea	79.8%	75.8%	4.0%	\$761.27	\$821.04	-7.3%	\$607.54	\$622.37	-2.4%
Lahaina/Kā'anapali/Kapalua	70.0%	64.6%	5.5%	\$451.35	\$465.52	-3.0%	\$316.12	\$300.51	5.2%
Other Maui County	74.6%	69.6%	4.9%	\$663.10	\$708.20	-6.4%	\$494.47	\$493.18	0.3%
Maui County Luxury	71.9%	68.6%	3.3%	\$974.33	\$1,003.96	-3.0%	\$700.66	\$689.16	1.7%
Maui County Upper Upscale & Upscale	72.4%	66.2%	6.2%	\$423.52	\$445.84	-5.0%	\$306.68	\$295.15	3.9%
Island of Hawai'i	76.2%	77.8%	-1.5%	\$488.05	\$453.76	7.6%	\$372.06	\$352.89	5.4%
Kohala Coast	77.5%	78.9%	-1.4%	\$687.21	\$621.96	10.5%	\$532.50	\$490.58	8.5%
Kauai	76.9%	77.7%	-0.8%	\$431.84	\$415.64	3.9%	\$332.11	\$323.01	2.8%

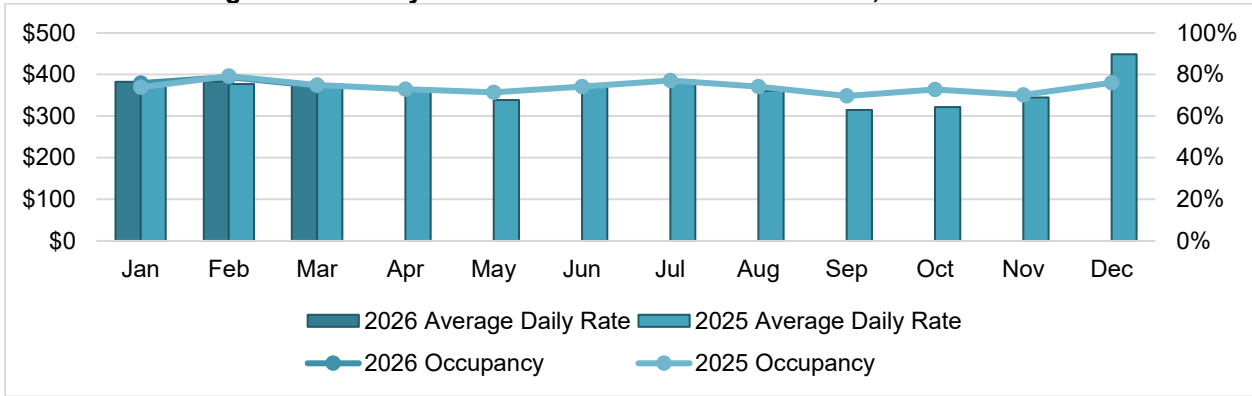
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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.
Please note that STR changed categories for some properties starting January 2026. 2025 data may differ from previously published reports.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date March 2026

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2026	2025	% Change	2026	2025	% Change	2026	2025	% Change
State of Hawai'i	5,121.6	5,119.6	0.0%	3,913.6	3,886.6	0.7%	1,485.8	1,472.7	0.9%
O'ahu	2,829.7	2,828.4	0.0%	2,212.3	2,236.0	-1.1%	616.5	632.2	-2.5%
Waikiki	2,368.0	2,366.7	0.1%	1,851.7	1,880.7	-1.5%	486.3	501.9	-3.1%
Maui County	1,215.7	1,209.2	0.5%	877.7	809.5	8.4%	487.7	472.8	3.1%
Wailea	229.9	229.7	0.1%	183.4	174.1	5.4%	139.6	142.9	-2.3%
Lahaina/Kā'anapali/ Kapalua	636.2	641.2	-0.8%	445.6	413.9	7.6%	201.1	192.7	4.4%
Island of Hawai'i	606.4	610.6	-0.7%	462.3	474.8	-2.6%	225.6	215.5	4.7%
Kohala Coast	259.7	258.8	0.3%	201.2	204.1	-1.4%	138.3	126.9	8.9%
Kauai	469.9	471.3	-0.3%	361.3	366.3	-1.3%	156.0	152.2	2.5%

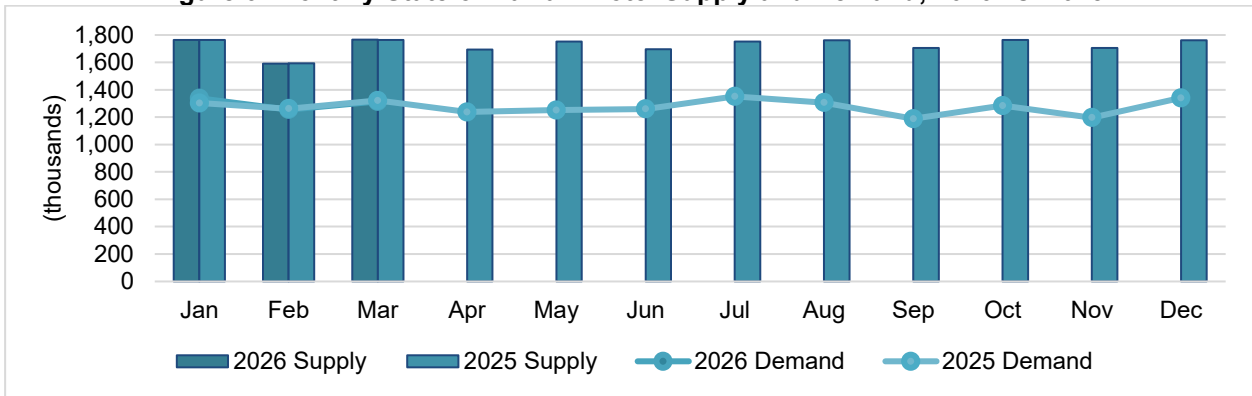
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2026 vs. 2025



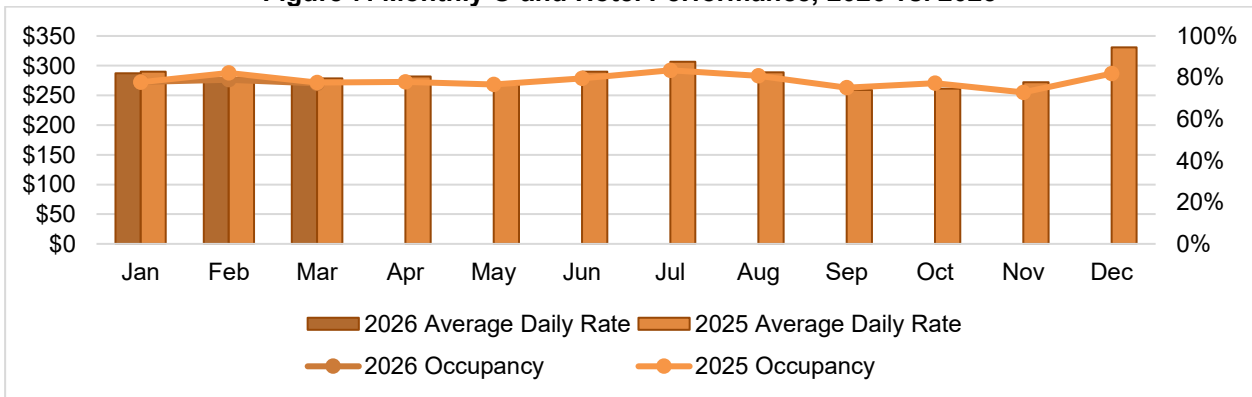
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2026 vs. 2025



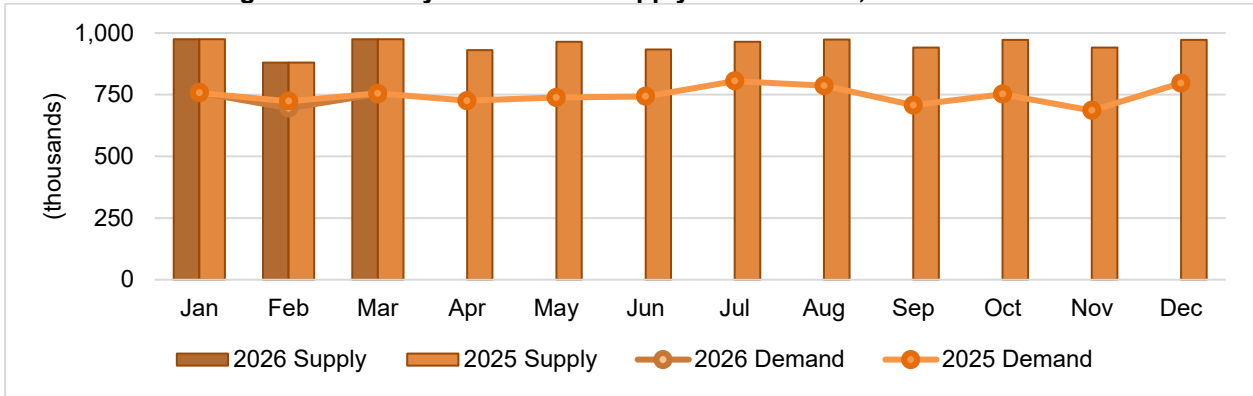
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Figure 7: Monthly O'ahu Hotel Performance, 2026 vs. 2025



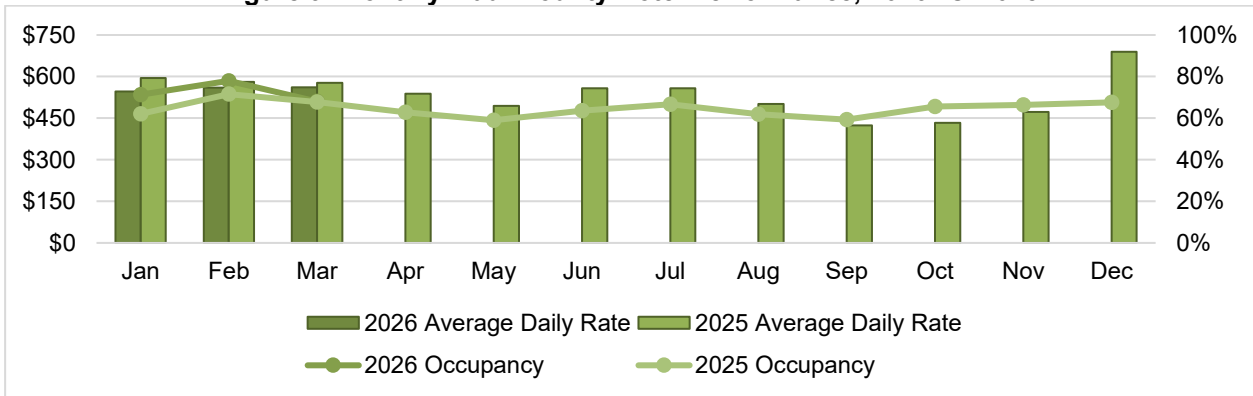
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Figure 8: Monthly O'ahu Hotel Supply and Demand, 2026 vs. 2025



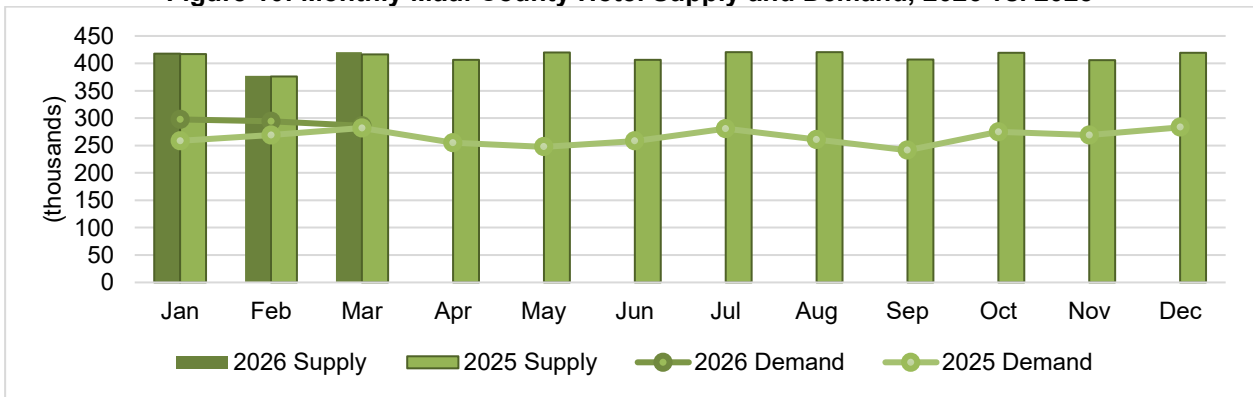
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Figure 9: Monthly Maui County Hotel Performance, 2026 vs. 2025



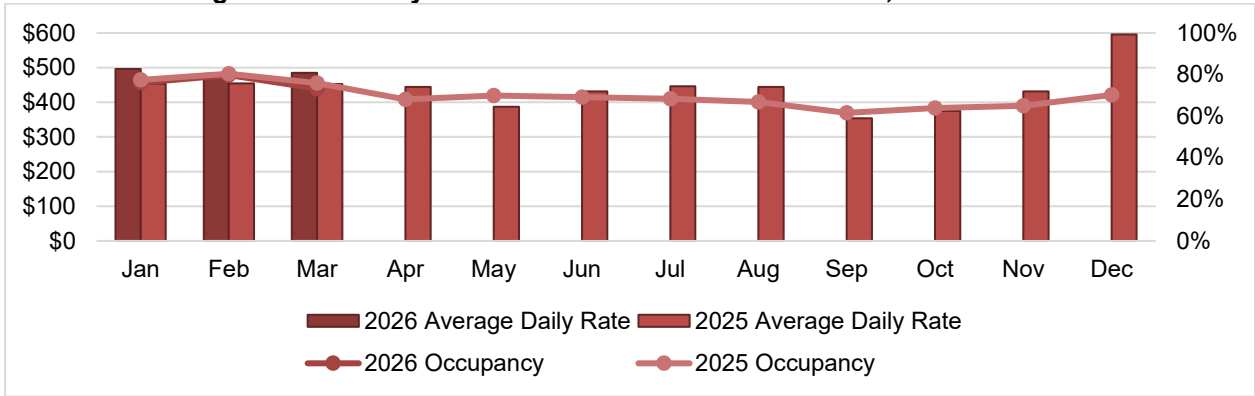
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Figure 10: Monthly Maui County Hotel Supply and Demand, 2026 vs. 2025



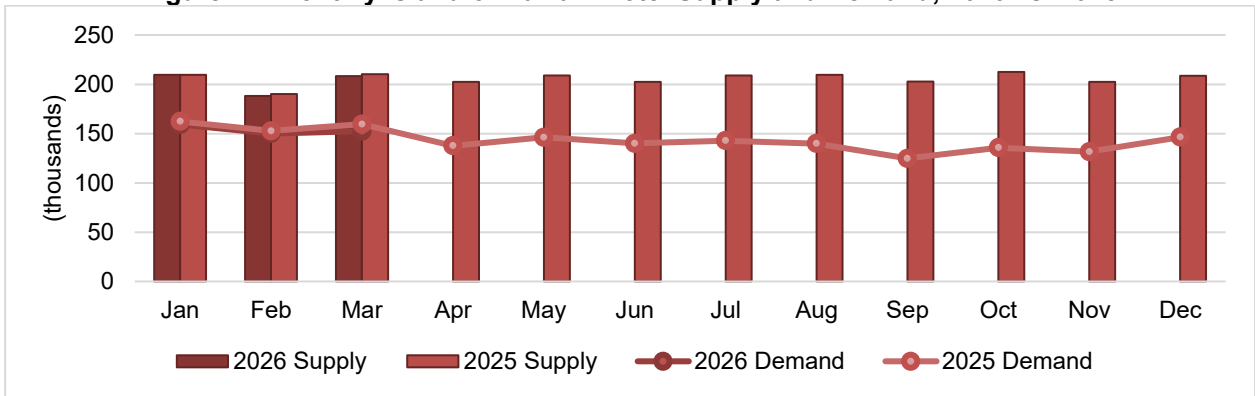
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Figure 11: Monthly Island of Hawai'i Hotel Performance, 2026 vs. 2025



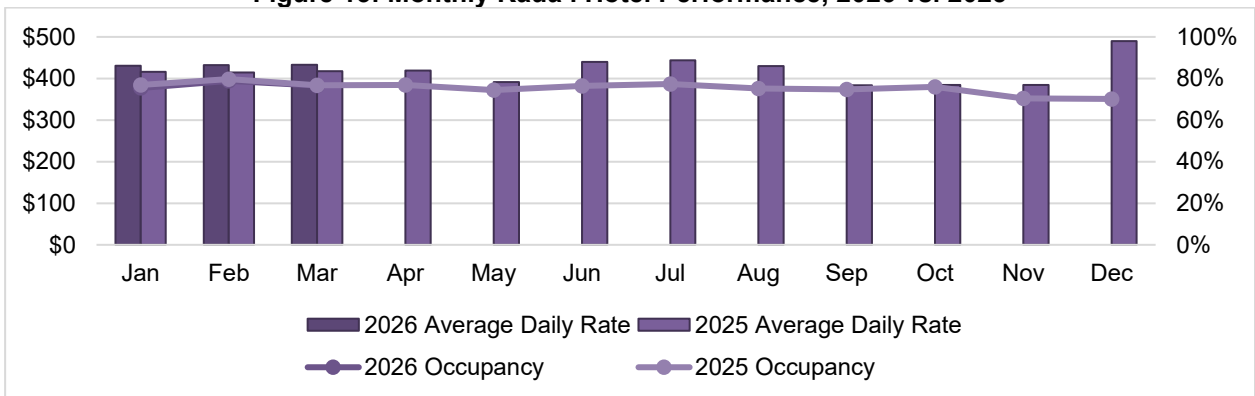
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Figure 12: Monthly Island of Hawai'i Hotel Supply and Demand, 2026 vs. 2025



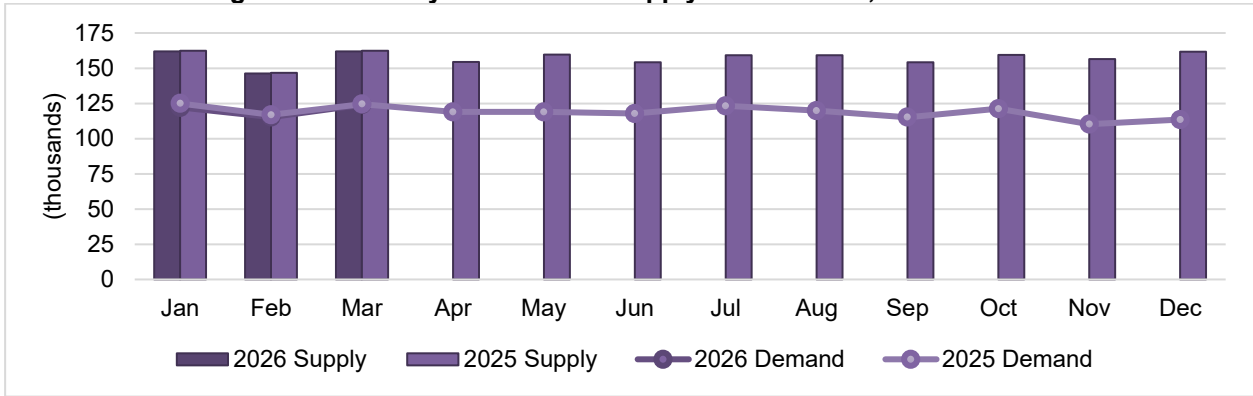
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Figure 13: Monthly Kaua'i Hotel Performance, 2026 vs. 2025



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Figure 14: Monthly Kaua'i Hotel Supply and Demand, 2026 vs. 2025



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Figure 15: Top 5 U.S. Markets – Revenue Per Available Room – YTD March 2026

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$290.10	0.8%
2	Miami, FL	\$260.37	12.1%
3	San Francisco/San Mateo, CA	\$203.59	31.2%
4	New York, NY	\$189.00	4.4%
5	Phoenix, AZ	\$182.41	7.1%

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Figure 16: Top 5 U.S. Markets – Average Daily Rate – YTD March 2026

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$379.65	0.2%
2	Miami, FL	\$311.52	10.8%
3	San Francisco/San Mateo, CA	\$292.01	17.5%
4	New York, NY	\$250.99	4.5%
5	Phoenix, AZ	\$232.15	3.7%

Source: STR, Inc. © Copyright 2026 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 17: Top 5 U.S. Markets – Occupancy – YTD March 2026

Rank	Destination	Occupancy	Percentage Pt. Change
1	Miami, FL	83.6%	0.9%
2	Phoenix, AZ	78.6%	2.5%
3	Orlando, FL	78.4%	1.3%
4	Las Vegas, NV	77.6%	1.6%
5	Tampa Bay, FL	76.8%	-6.1%

Source: STR, Inc. © Copyright 2026 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 18: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD March 2026

Rank	Destination	Revenue Per Available Room	% Change
1	Maldives	\$630.25	5.8%
2	Aruba	\$500.26	16.4%
3	Bahamas	\$466.45	22.2%
4	Maui County	\$401.14	2.6%
5	French Polynesia	\$374.76	11.7%
6	Hawai'i Island	\$372.06	5.4%
7	Cabo San Lucas+	\$340.09	2.3%
8	Kaua'i	\$332.11	2.8%
9	Puerto Rico	\$307.02	6.6%
10	Costa Rica	\$240.15	4.5%
11	Cancun+	\$232.23	-2.9%
12	O'ahu	\$217.86	-2.5%
13	Phuket	\$193.84	12.2%
14	Puerto Vallarta+	\$168.30	-6.6%
15	Fiji	\$151.76	18.8%

Source: STR, Inc. © Copyright 2026 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 19: Competitive Sun and Sea Destinations – Average Daily Rate – YTD March 2026

Rank	Destination	Average Daily Rate	% Change
1	Maldives	\$820.50	7.0%
2	French Polynesia	\$696.78	16.5%
3	Aruba	\$606.61	12.5%
4	Cabo San Lucas+	\$566.87	9.5%
5	Bahamas	\$559.32	11.7%
6	Maui County	\$555.61	-4.9%
7	Hawai'i Island	\$488.05	7.6%
8	Kaua'i	\$431.84	3.9%
9	Puerto Rico	\$365.75	-1.3%
10	Costa Rica	\$310.33	3.0%
11	Cancun+	\$293.55	-1.8%
12	O'ahu	\$278.66	-1.4%
13	Phuket	\$233.04	10.2%
14	Puerto Vallarta+	\$228.50	5.8%
15	Fiji	\$227.59	4.6%

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Figure 20: Competitive Sun and Sea Destinations – Occupancy – YTD March 2026

Rank	Destination	Occupancy	Percentage Pt. Change
1	Puerto Rico	83.9%	6.2%
2	Bahamas	83.4%	7.2%
3	Phuket	83.2%	1.5%
4	Aruba	82.5%	2.7%
5	Cancun+	79.1%	-0.9%
6	O'ahu	78.2%	-0.9%
7	Costa Rica	77.4%	1.1%
8	Kaua'i	76.9%	-0.8%
9	Maldives	76.8%	-0.9%
10	Hawai'i Island	76.2%	-1.5%
11	Puerto Vallarta+	73.7%	-9.7%
12	Maui County	72.2%	5.3%
13	Fiji	66.7%	8.0%
14	Cabo San Lucas+	60.0%	-4.2%
15	Bali	57.6%	-2.2%

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