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ECONOMIC DEVELOPMENT & TOURISM**
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December 2023 Hawai'i Vacation Rental Performance Report

Vacation rentals across Hawai'i reported increases in supply and demand, with lower average daily rate (ADR) and occupancy in December 2023 when compared to December 2022. In comparison to pre-pandemic December 2019, ADR was higher in December 2023, but vacation rental supply, demand and occupancy were lower.

The State of Hawai'i Department of Business, Economic Development & Tourism (DBEDT) issued today the Hawai'i Vacation Rental Performance Report for the month of December utilizing data compiled by Lighthouse Intelligence, Ltd.

In December 2023, the total monthly supply of statewide vacation rentals was 768,300 unit nights (+15.7% vs. 2022, -10.3% vs. 2019) and monthly demand was 410,800 unit nights (+6.8% vs. 2022, -36.4% vs. 2019) (Figures 1 and 2). This combination resulted in an average monthly unit occupancy of 53.5 percent (-4.5 percentage points vs. 2022, -21.9 percentage points vs. 2019) for December. Occupancy for Hawai'i's hotels was 72.2 percent in December 2023.

The ADR for vacation rental units statewide in December was \$318 (-1.5% vs. 2022, +35.8% vs. 2019). By comparison, the ADR for hotels was \$428 in December 2023. 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 Hawai'i Tourism Authority'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 private home, or shared room/space in 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 December 2023, vacation rental units in Lahaina continued to be inactive due to the August 8 Maui wildfires. In December 2023, Maui County had the largest vacation rental supply at 233,300 available unit nights (+11.3% vs. 2022, -20.4% vs. 2019). Unit demand was 127,900 unit nights (-1.5% vs. 2022, -44.7% vs. 2019), resulting in 54.8 percent occupancy (-7.1 percentage points vs. 2022, -24.2 percentage points vs. 2019) and ADR

at \$394 (+0.8% vs. 2022, +41.6% vs. 2019). For December 2023, Maui County hotels reported ADR at \$612 and occupancy of 68.7 percent.

O'ahu vacation rental supply was 212,700 available unit nights in December (+12.7% vs. 2022, -10.4% vs. 2019). Unit demand was 117,600 unit nights (+6.9% vs. 2022, -34.6% vs. 2019), resulting in 55.3 percent occupancy (-3.0 percentage points vs. 2022, -20.4 percentage points vs. 2019) with ADR at \$258 (+1.2% vs. 2022, +34.5% vs. 2019). In comparison, O'ahu hotels reported ADR at \$321 and occupancy of 75.5 percent for December 2023.

The island of Hawai'i vacation rental supply was 194,000 available unit nights (+20.2% vs. 2022, -5.1% vs. 2019) in December. Unit demand was 100,500 unit nights (+10.8% vs. 2022, -31.6% vs. 2019), resulting in 51.8 percent occupancy (-4.4 percentage points vs. 2022, -20.1 percentage points vs. 2019) with ADR at \$250 (-6.9% vs. 2022, +37.6% vs. 2019). Hawai'i Island hotels reported ADR at \$560 and occupancy of 67.7 percent.

Kaua'i had the fewest number of available vacation rental unit nights in December at 128,300 (+22.8% vs. 2022, +5.2% vs. 2019). Unit demand was 64,900 unit nights (+19.4% vs. 2022, -26.0% vs. 2019), resulting in 50.5 percent occupancy (-1.4 percentage points vs. 2022, -21.3 percentage points vs. 2019) with ADR at \$384 (-1.5% vs. 2022, +30.7% vs. 2019). Kaua'i hotels reported ADR at \$489 and occupancy of 67.3 percent.

Year End 2023

For the full year of 2023, Hawai'i vacation rental supply was 8.8 million unit nights (+17.2% vs. 2022, -14.5% vs. 2019) and demand was 4.9 million unit nights (-0.7% vs. 2022, -35.5% vs. 2019). The average daily unit rate for 2023 was \$301 (+1.8% vs. 2022, +45.1% vs. 2019). Statewide vacation rental occupancy for 2023 was 55.9 percent (-15.3 percentage points vs. 2022, -24.6 percentage points vs. 2019). In comparison, statewide hotel ADR for 2023 was \$378 and occupancy was 74.7 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 and HomeAway. Data for units included in Hawai'i Tourism Authority's Hawai'i Hotel Performance Report and DBEDT's 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 and HTA do not support illegal vacation rentals.

Transparent enriches their occupancy and price calculations with reservations data provided by vacation rental software providers, online travel agencies and local property managers. Currently, the reservations data provided by data partners represent about 33.5 percent of the estimated total unique vacation rental properties in the State of Hawai'i.

For December 2023, the report included data for 33,701 units, representing 58,130 bedrooms in the Hawaiian Islands.

Figure 1: Hawai'i Vacation Rental Performance December 2023

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2023	2022	% Change	2023	2022	% Change	2023	2022	Percentage Pt. Change	2023	2022	% Change
State of Hawai'i	768,335	664,176	15.7%	410,769	384,761	6.8%	53.5%	57.9%	-4.5%	\$318.15	\$322.92	-1.5%
O'ahu	212,666	188,642	12.7%	117,567	110,005	6.9%	55.3%	58.3%	-3.0%	\$257.51	\$254.56	1.2%
Waikīkī	123,146	114,624	7.4%	78,774	72,949	8.0%	64.0%	63.6%	0.3%	\$218.28	\$216.03	1.0%
Maui County	233,344	209,578	11.3%	127,862	129,765	-1.5%	54.8%	61.9%	-7.1%	\$394.21	\$390.99	0.8%
Wailea/Kīhei	106,264	90,306	17.7%	60,947	54,042	12.8%	57.4%	59.8%	-2.5%	\$333.79	\$337.90	-1.2%
Lahaina/Kā'anapali/ Nāpili/Kapalua	99,476	94,319	5.5%	53,892	60,777	-11.3%	54.2%	64.4%	-10.3%	\$492.76	\$468.07	5.3%
Island of Hawai'i	194,007	161,459	20.2%	100,479	90,684	10.8%	51.8%	56.2%	-4.4%	\$249.77	\$268.25	-6.9%
Kona	98,172	80,986	21.2%	51,358	44,953	14.2%	52.3%	55.5%	-3.2%	\$259.08	\$256.19	1.1%
Hilo/Honoka'a	43,052	36,028	19.5%	21,924	21,748	0.8%	50.9%	60.4%	-9.4%	\$142.93	\$145.94	-2.1%
Kaua'i	128,318	104,497	22.8%	64,861	54,307	19.4%	50.5%	52.0%	-1.4%	\$384.07	\$390.02	-1.5%

Source: Lighthouse Intelligence, Ltd. © Copyright 2024 State of Hawaii Department of Business, Economic Development & Tourism

Figure 2: Hawai'i Vacation Rental Performance December 2023 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2023	2019	% Change	2023	2019	% Change	2023	2019	Percentage Pt. Change	2023	2019	% Change
State of Hawai'i	768,335	856,798	-10.3%	410,769	645,575	-36.4%	53.5%	75.3%	-21.9%	\$318.15	\$234.20	35.8%
O'ahu	212,666	237,306	-10.4%	117,567	179,700	-34.6%	55.3%	75.7%	-20.4%	\$257.51	\$191.40	34.5%
Waikīkī	123,146	120,086	2.5%	78,774	94,536	-16.7%	64.0%	78.7%	-14.8%	\$218.28	\$165.60	31.8%
Maui County	233,344	293,100	-20.4%	127,862	231,419	-44.7%	54.8%	79.0%	-24.2%	\$394.21	\$278.36	41.6%
Wailea/Kīhei	106,264	134,565	-21.0%	60,947	111,356	-45.3%	57.4%	82.8%	-25.4%	\$333.79	\$265.49	25.7%
Lahaina/Kā'anapali/ Nāpili/Kapalua	99,476	123,342	-19.3%	53,892	93,086	-42.1%	54.2%	75.5%	-21.3%	\$492.76	\$314.29	56.8%
Island of Hawai'i	194,007	204,394	-5.1%	100,479	146,841	-31.6%	51.8%	71.8%	-20.1%	\$249.77	\$181.46	37.6%
Kona	98,172	96,057	2.2%	51,358	73,055	-29.7%	52.3%	76.1%	-23.7%	\$259.08	\$150.46	72.2%
Hilo/Honoka'a	43,052	45,053	-4.4%	21,924	29,739	-26.3%	50.9%	66.0%	-15.1%	\$142.93	\$107.79	32.6%
Kaua'i	128,318	121,998	5.2%	64,861	87,615	-26.0%	50.5%	71.8%	-21.3%	\$384.07	\$293.75	30.7%

Source: Lighthouse Intelligence, Ltd. © Copyright 2024 State of Hawaii Department of Business, Economic Development & Tourism

Figure 3: Hawai'i Vacation Rental Performance Year-to-Date December 2023

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2023	2022	% Change	2023	2022	% Change	2023	2022	Percentage Pt. Change	2023	2022	% Change
State of Hawai'i	8,765,357	7,479,668	17.2%	4,896,906	4,932,174	-0.7%	55.9%	65.9%	-15.3%	\$301.02	\$295.69	1.8%
O'ahu	2,526,816	2,119,204	19.2%	1,467,325	1,382,777	6.1%	58.1%	65.2%	-11.0%	\$241.13	\$221.97	8.6%
Waikīkī	1,500,051	1,254,448	19.6%	975,489	884,742	10.3%	65.0%	70.5%	-7.8%	\$202.60	\$177.43	14.2%
North Shore	288,849	259,259	11.4%	157,384	167,593	-6.1%	54.5%	64.6%	-15.7%	\$374.07	\$332.11	12.6%
Other Honolulu	218,229	192,794	13.2%	86,508	96,837	-10.7%	39.6%	50.2%	-21.1%	\$190.87	\$206.81	-7.7%
Leeward/Mākaaha Side	245,926	190,861	28.9%	124,048	111,380	11.4%	50.4%	58.4%	-13.6%	\$394.90	\$359.98	9.7%
Windward Side	203,792	169,207	20.4%	88,987	90,855	-2.1%	43.7%	53.7%	-18.7%	\$304.99	\$328.63	-7.2%
Ala Moana Area	56,741	41,320	37.3%	30,157	25,408	18.7%	53.1%	61.5%	-13.6%	\$138.00	\$141.43	-2.4%
Airport Area	13,228	11,315	16.9%	4,752	5,962	-20.3%	35.9%	52.7%	-31.8%	\$107.79	\$120.71	-10.7%
Maui County	2,535,742	2,495,714	1.6%	1,500,085	1,746,604	-14.1%	59.2%	70.0%	-15.5%	\$367.77	\$351.63	4.6%
Wailea/Kīhei	1,239,489	1,109,498	11.7%	726,652	775,184	-6.3%	58.6%	69.9%	-16.1%	\$314.45	\$306.47	2.6%
Lahaina/Kā'anapali/ Nāpili/Kapalua	975,121	1,092,311	-10.7%	605,593	776,605	-22.0%	62.1%	71.1%	-12.6%	\$462.42	\$422.12	9.5%
Mā'alaea	121,574	109,332	11.2%	71,757	83,093	-13.6%	59.0%	76.0%	-22.3%	\$260.40	\$259.83	0.2%
Kahului/Wailuku	85,145	80,832	5.3%	46,820	55,533	-15.7%	55.0%	68.7%	-20.0%	\$282.26	\$253.71	11.3%
Kula/Makawao Area	19,693	17,434	13.0%	11,195	12,047	-7.1%	56.8%	69.1%	-17.7%	\$243.04	\$260.06	-6.5%
Hāna Area	20,534	19,807	3.7%	13,954	17,365	-19.6%	68.0%	87.7%	-22.5%	\$375.49	\$362.09	3.7%
<i>Island of Maui</i>	<i>2,461,556</i>	<i>2,429,214</i>	<i>1.3%</i>	<i>1,475,971</i>	<i>1,719,827</i>	<i>-14.2%</i>	<i>60.0%</i>	<i>70.8%</i>	<i>-15.3%</i>	<i>\$371.54</i>	<i>\$354.97</i>	<i>4.7%</i>
<i>Moloka'i</i>	<i>72,239</i>	<i>64,432</i>	<i>12.1%</i>	<i>22,856</i>	<i>25,244</i>	<i>-9.5%</i>	<i>31.6%</i>	<i>39.2%</i>	<i>-19.2%</i>	<i>\$131.06</i>	<i>\$129.95</i>	<i>0.9%</i>
<i>Lāna'i</i>	<i>1,947</i>	<i>2,068</i>	<i>-5.9%</i>	<i>1,258</i>	<i>1,533</i>	<i>-17.9%</i>	<i>64.6%</i>	<i>74.1%</i>	<i>-12.8%</i>	<i>\$240.92</i>	<i>\$247.01</i>	<i>-2.5%</i>
Island of Hawai'i	2,289,010	1,802,378	27.0%	1,150,061	1,110,004	3.6%	50.2%	61.6%	-18.4%	\$238.62	\$241.85	-1.3%
Kona	1,157,934	864,797	33.9%	585,323	533,652	9.7%	50.5%	61.7%	-18.1%	\$238.99	\$231.74	3.1%
Kohala/Waimea/Kawaihae	486,039	413,072	17.7%	245,790	249,358	-1.4%	50.6%	60.4%	-16.2%	\$362.86	\$393.29	-7.7%
Hilo/Honoka'a	506,791	408,168	24.2%	249,806	252,207	-1.0%	49.3%	61.8%	-20.2%	\$138.82	\$139.15	-0.2%
Volcano Area	112,506	90,870	23.8%	56,995	60,094	-5.2%	50.7%	66.1%	-23.4%	\$156.47	\$157.36	-0.6%
Nā'ālehu /Ka'ū	25,740	25,471	1.1%	12,147	14,693	-17.3%	47.2%	57.7%	-18.2%	\$144.19	\$146.86	-1.8%
Kaua'i	1,413,789	1,062,372	33.1%	779,435	692,789	12.5%	55.1%	65.2%	-15.5%	\$377.35	\$388.05	-2.8%
Princeville/Hanalei	612,866	448,677	36.6%	311,115	270,690	14.9%	50.8%	60.3%	-15.9%	\$348.31	\$374.17	-6.9%
Po'ipū/Kukui'ula	416,854	355,427	17.3%	259,470	242,347	7.1%	62.2%	68.2%	-8.7%	\$464.18	\$471.72	-1.6%
Wailua/Kapa'a	245,552	179,628	36.7%	140,501	124,484	12.9%	57.2%	69.3%	-17.4%	\$308.50	\$287.76	7.2%
Līhu'e	126,072	66,666	89.1%	60,842	46,382	31.2%	48.3%	69.6%	-30.6%	\$319.65	\$314.29	1.7%
Kalāheo/Waimea	12,080	11,609	4.1%	7,507	8,886	-15.5%	62.1%	76.5%	-18.8%	\$336.17	\$319.11	5.3%

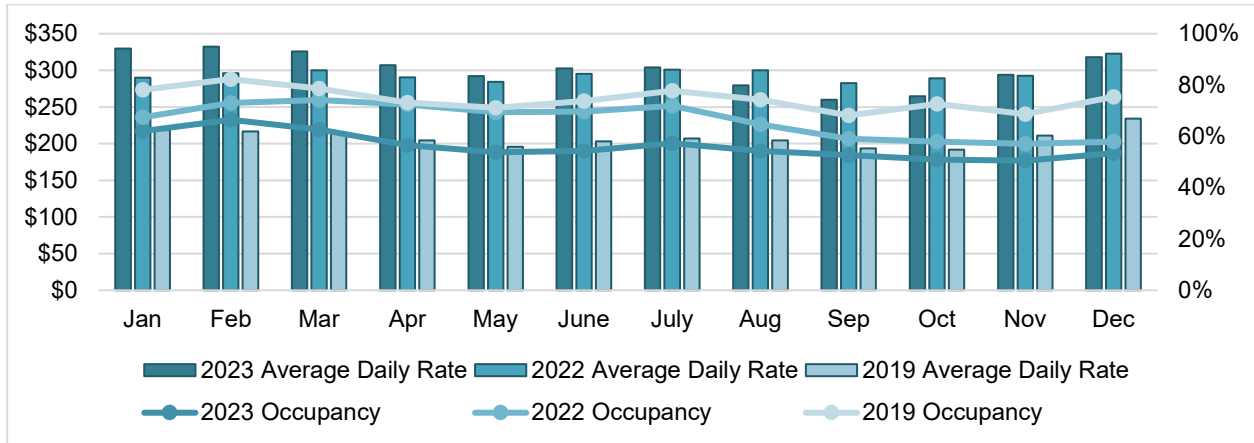
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Figure 4: Hawai'i Vacation Rental Performance Year-to-Date December 2023 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2023	2019	% Change	2023	2019	% Change	2023	2019	Percentage Pt. Change	2023	2019	% Change
State of Hawai'i	8,765,357	10,246,122	-14.5%	4,896,906	7,595,838	-35.5%	55.9%	74.1%	-24.6%	\$301.02	\$207.50	45.1%
O'ahu	2,526,816	3,231,022	-21.8%	1,467,325	2,416,639	-39.3%	58.1%	74.8%	-22.4%	\$241.13	\$168.15	43.4%
Waikīkī	1,500,051	1,414,370	6.1%	975,489	1,108,206	-12.0%	65.0%	78.4%	-17.0%	\$202.60	\$146.58	38.2%
North Shore	288,849	480,843	-39.9%	157,384	353,784	-55.5%	54.5%	73.6%	-25.9%	\$374.07	\$194.06	92.8%
Other Honolulu	218,229	432,417	-49.5%	86,508	302,487	-71.4%	39.6%	70.0%	-43.3%	\$190.87	\$166.06	14.9%
Leeward/Mākaaha Side	245,926	382,291	-35.7%	124,048	271,599	-54.3%	50.4%	71.0%	-29.0%	\$394.90	\$210.75	87.4%
Windward Side	203,792	433,091	-52.9%	88,987	318,278	-72.0%	43.7%	73.5%	-40.6%	\$304.99	\$191.44	59.3%
Ala Moana Area	56,741	51,722	9.7%	30,157	35,799	-15.8%	53.1%	69.2%	-23.2%	\$138.00	\$129.62	6.5%
Airport Area	13,228	36,288	-63.5%	4,752	26,486	-82.1%	35.9%	73.0%	-50.8%	\$107.79	\$83.59	28.9%
Maui County	2,535,742	3,249,187	-22.0%	1,500,085	2,557,497	-41.3%	59.2%	78.7%	-24.8%	\$367.77	\$248.01	48.3%
Wailea/Kthei	1,239,489	1,529,555	-19.0%	726,652	1,227,366	-40.8%	58.6%	80.2%	-26.9%	\$314.45	\$239.15	31.5%
Lahaina/Kā'anapali/ Nāpili/Kapalua	975,121	1,317,351	-26.0%	605,593	1,026,383	-41.0%	62.1%	77.9%	-20.3%	\$462.42	\$276.84	67.0%
Mā'alaea	121,574	130,718	-7.0%	71,757	107,000	-32.9%	59.0%	81.9%	-27.9%	\$260.40	\$190.34	36.8%
Kahului/Wailuku	85,145	115,030	-26.0%	46,820	89,266	-47.6%	55.0%	77.6%	-29.1%	\$282.26	\$200.57	40.7%
Kula/Makawao Area	19,693	31,117	-36.7%	11,195	23,255	-51.9%	56.8%	74.7%	-23.9%	\$243.04	\$188.75	28.8%
Hāna Area	20,534	27,838	-26.2%	13,954	23,346	-40.2%	68.0%	83.9%	-19.0%	\$375.49	\$270.18	39.0%
Island of Maui	2,461,556	3,151,609	-21.9%	1,475,971	2,496,616	-40.9%	60.0%	79.2%	-24.3%	\$371.54	\$250.99	48.0%
Moloka'i	72,239	92,762	-22.1%	22,856	57,800	-60.5%	31.6%	62.3%	-49.2%	\$131.06	\$119.72	9.5%
Lāna'i	1,947	4,816	-59.6%	1,258	3,081	-59.2%	64.6%	64.0%	1.0%	\$240.92	\$239.61	0.5%
Island of Hawai'i	2,289,010	2,332,287	-1.9%	1,150,061	1,546,702	-25.6%	50.2%	66.3%	-24.2%	\$238.62	\$162.86	46.5%
Kona	1,157,934	1,123,310	3.1%	585,323	798,227	-26.7%	50.5%	71.1%	-28.9%	\$238.99	\$135.29	76.6%
Kohala/Waimea/Kawaihae	486,039	571,333	-14.9%	245,790	377,105	-34.8%	50.6%	66.0%	-23.4%	\$362.86	\$282.92	28.3%
Hilo/Honoka'a	506,791	468,834	8.1%	249,806	275,626	-9.4%	49.3%	58.8%	-16.2%	\$138.82	\$95.68	45.1%
Volcano Area	112,506	130,651	-13.9%	56,995	73,816	-22.8%	50.7%	56.5%	-10.3%	\$156.47	\$114.01	37.2%
Nā'ālehu /Ka'ū	25,740	38,159	-32.5%	12,147	21,928	-44.6%	47.2%	57.5%	-17.9%	\$144.19	\$110.53	30.4%
Kaua'i	1,413,789	1,433,626	-1.4%	779,435	1,075,000	-27.5%	55.1%	75.0%	-26.5%	\$377.35	\$263.81	43.0%
Princeville/Hanalei	612,866	566,610	8.2%	311,115	425,666	-26.9%	50.8%	75.1%	-32.4%	\$348.31	\$265.97	31.0%
Po'ipū/Kukui'ula	416,854	519,226	-19.7%	259,470	387,595	-33.1%	62.2%	74.6%	-16.6%	\$464.18	\$304.89	52.2%
Wailua/Kapa'a	245,552	240,017	2.3%	140,501	180,732	-22.3%	57.2%	75.3%	-24.0%	\$308.50	\$197.68	56.1%
Līhu'e	126,072	83,582	50.8%	60,842	62,548	-2.7%	48.3%	74.8%	-35.5%	\$319.65	\$188.77	69.3%
Kalāheo/Waimea	12,080	23,674	-49.0%	7,507	18,259	-58.9%	62.1%	77.1%	-19.4%	\$336.17	\$254.21	32.2%

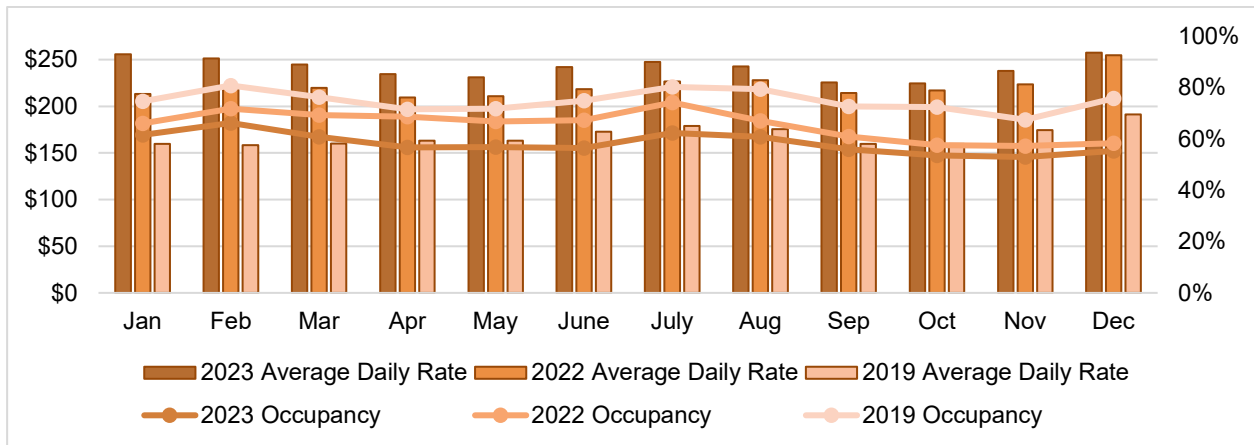
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Figure 5: Monthly State of Hawai'i Vacation Rental Performance - 2023 vs. 2022 vs. 2019



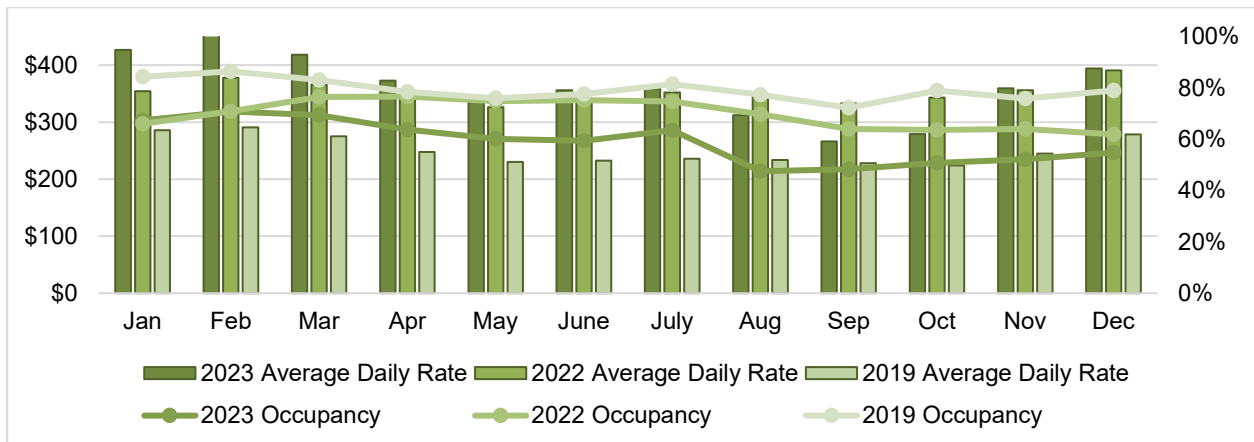
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Figure 6: Monthly O'ahu Vacation Rental Performance - 2023 vs. 2022 vs. 2019



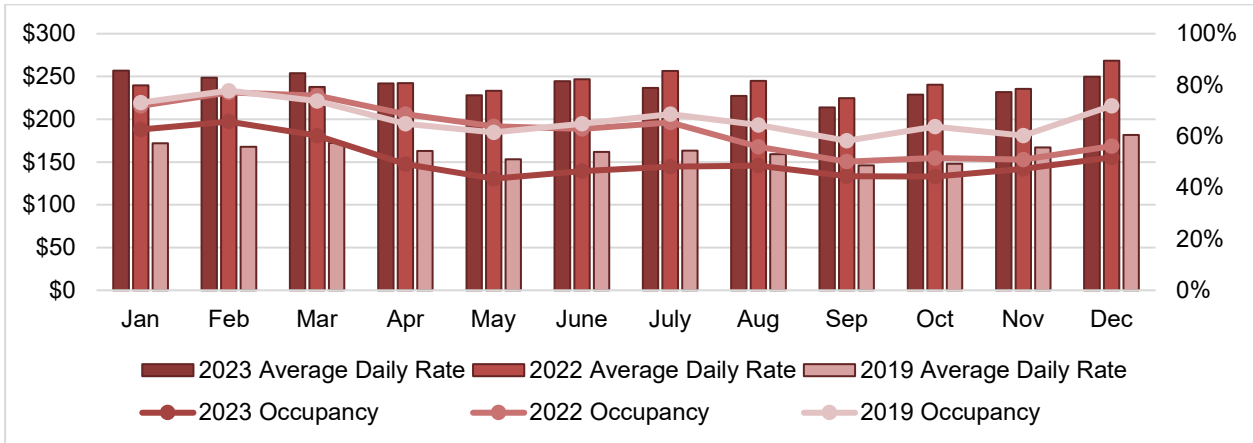
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Figure 7: Monthly Maui County Vacation Rental Performance - 2023 vs. 2022 vs. 2019



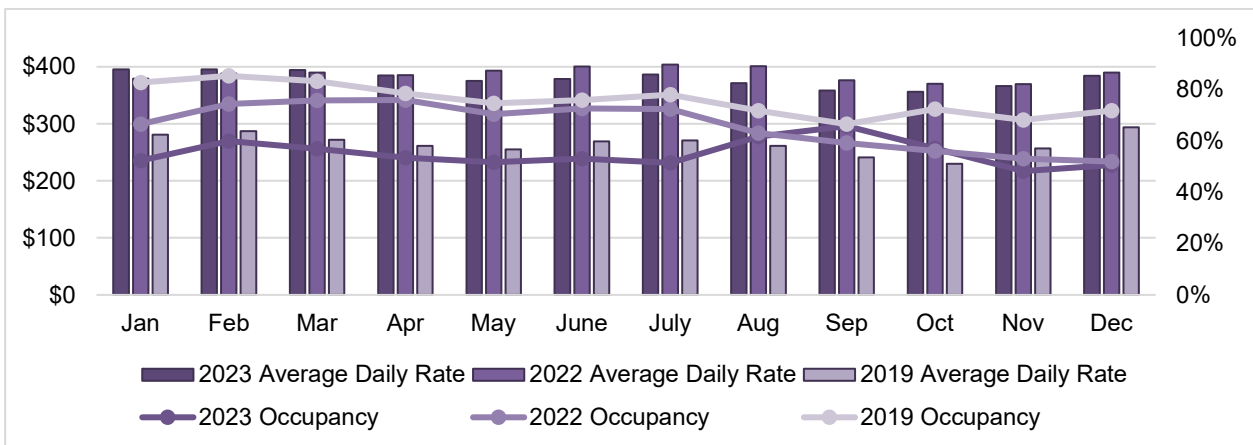
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Figure 8: Monthly Island of Hawai'i Vacation Rental Performance - 2023 vs. 2022 vs. 2019



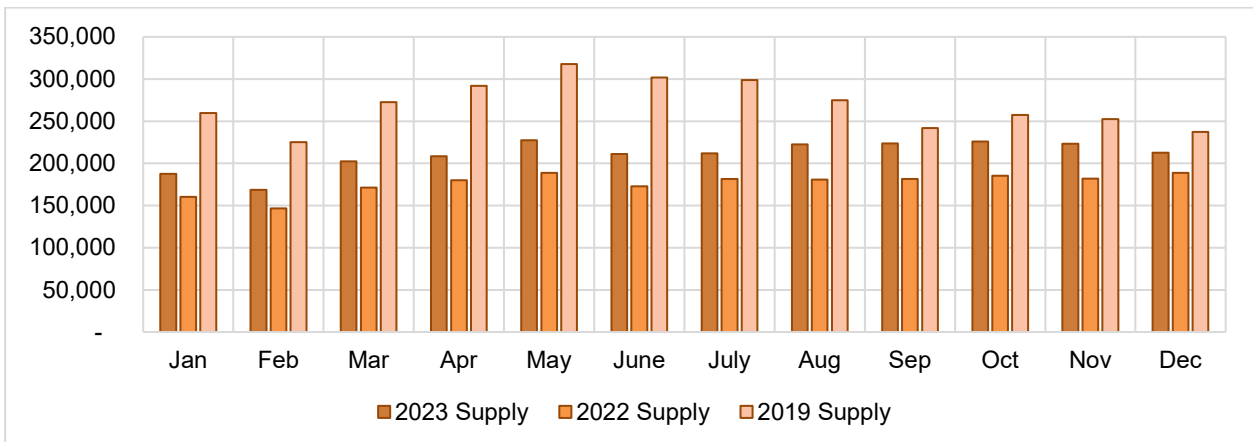
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Figure 9: Monthly Kaua'i Vacation Rental Performance - 2023 vs. 2022 vs. 2019



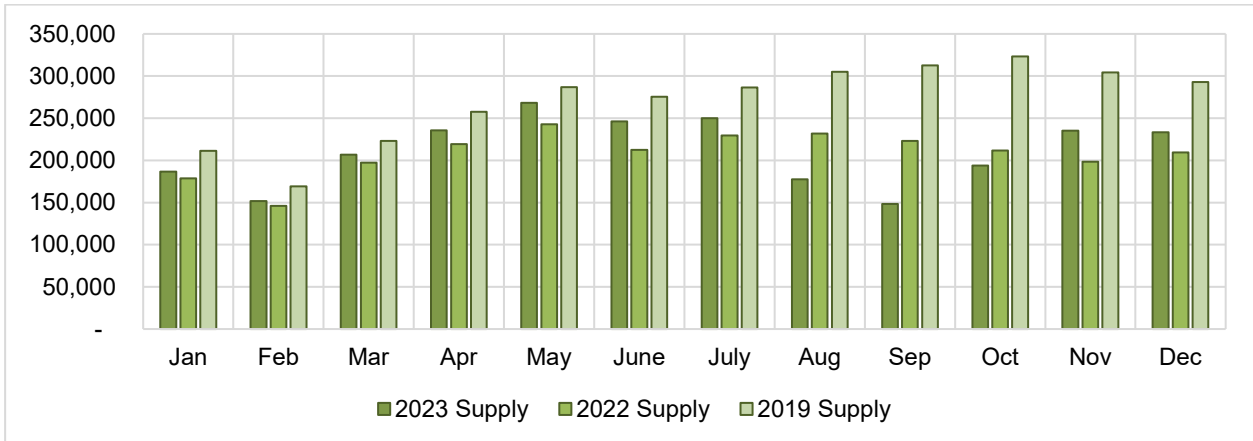
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Figure 10: Monthly O'ahu Unit Night Supply - 2023 vs. 2022 vs. 2019



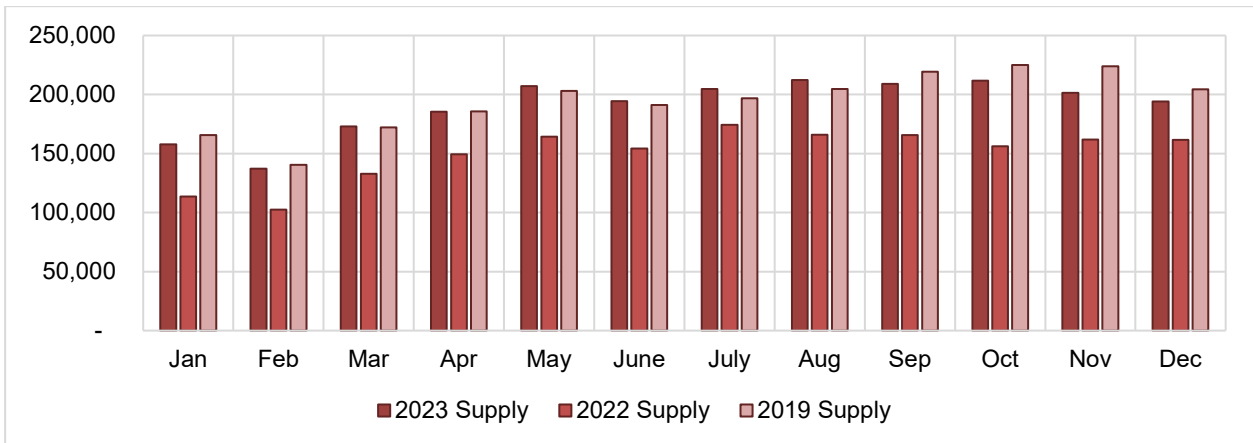
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Figure 11: Monthly Maui County Unit Night Supply - 2023 vs. 2022 vs. 2019



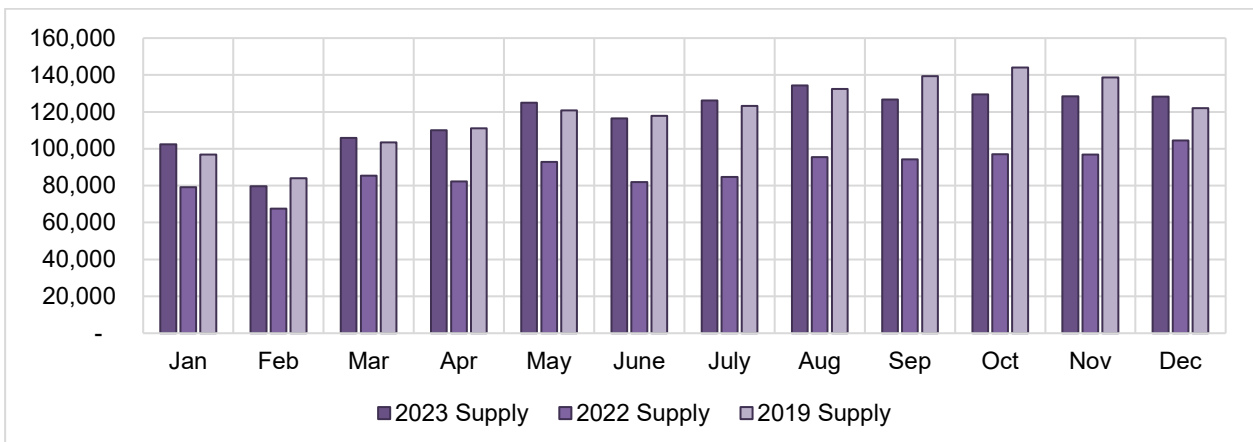
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Figure 12: Monthly Island of Hawai'i Unit Night Supply - 2023 vs. 2022 vs. 2019



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Figure 13: Monthly Kaua'i Unit Night Supply - 2023 vs. 2022 vs. 2019



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