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## December 2024 Hawai'i Vacation Rental Performance Report

Vacation rentals across Hawai'i reported increases in supply, average daily rate (ADR) and demand, with a lower occupancy rate in December 2024 when compared to December 2023. In comparison to pre-pandemic December 2019, ADR was higher in December 2024 but vacation rental supply, demand and occupancy were lower.

In December 2024, the total monthly supply of statewide vacation rentals was 794,700 unit nights (+3.4% vs. 2023, -7.2% vs. 2019) and monthly demand was 413,100 unit nights (+0.6% vs. 2023, -36.0% vs. 2019) (Figures 1 and 2). This combination resulted in an average monthly unit occupancy of 52.0 percent (-1.5 percentage points vs. 2023, -23.4 percentage points vs. 2019) for December. Occupancy for Hawai'i's hotels was 71.3 percent in December 2024.

The ADR for vacation rental units statewide in December was \$354 (+11.3% vs. 2023, +51.2% vs. 2019). By comparison, the ADR for hotels was \$435 in December 2024. 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 December 2024, Maui County had the largest vacation rental supply at 247,400 available unit nights (+6.0% vs. 2023, -15.6% vs. 2019). Unit demand was 132,700 unit nights (+3.8% vs. 2023, -42.6% vs. 2019), resulting in 53.7 percent occupancy (-1.1 percentage points vs. 2023, -25.3 percentage points vs. 2019) and ADR at \$425 (+7.9% vs. 2023, +52.8% vs. 2019). For December 2024, Maui County hotels reported ADR at \$701 and occupancy of 60.3 percent.

O'ahu vacation rental supply was 212,400 available unit nights (-0.1% vs. 2023, -10.5% vs. 2019). Unit demand was 116,500 unit nights (-0.9% vs. 2023, -35.2% vs. 2019), resulting in 54.9 percent occupancy (-0.4 percentage points vs. 2023, -20.9 percentage

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points vs. 2019) with ADR at \$294 (+14.2% vs. 2023, +53.7% vs. 2019). In comparison, O'ahu hotels reported ADR at \$323 and occupancy of 77.1 percent for December 2024.

The island of Hawai'i vacation rental supply was 196,400 available unit nights (+1.2% vs. 2023, -3.9% vs. 2019) in December. Unit demand was 97,000 unit nights (-3.4% vs. 2023, -33.9% vs. 2019), resulting in 49.4 percent occupancy (-2.4 percentage points vs. 2023, -22.4 percentage points vs. 2019) with ADR at \$290 (+16.1% vs. 2023, +59.8% vs. 2019). Hawai'i Island hotels reported ADR at \$538 and occupancy of 68.7 percent.

Kaua'i had the fewest number of available vacation rental unit nights in December at 138,500 (+7.9% vs. 2023, +13.5% vs. 2019). Unit demand was 66,800 unit nights (+3.0% vs. 2023, -23.8% vs. 2019), resulting in 48.2 percent occupancy (-2.3 percentage points vs. 2023, -23.6 percentage points vs. 2019) with ADR at \$410 (+6.8% vs. 2023, +39.7% vs. 2019). Kaua'i hotels reported ADR at \$455 and occupancy of 68.6 percent.

### Year End 2024

In 2024, Hawai'i vacation rental supply was 9.7 million unit nights (+10.3% vs. 2023, -5.7% vs. 2019) and demand was 5.0 million unit nights (+2.8% vs. 2023, -33.7% vs. 2019). 2024 average daily unit rate was \$323 (+7.4% vs. 2023, +55.9% vs. 2019). Statewide vacation rental occupancy in 2024 was 52.1 percent (-6.7 percentage points vs. 2023, -29.7 percentage points vs. 2019). In comparison, statewide hotel ADR in 2024 was \$365 and occupancy was 73.3 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 system 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 December 2024, the report included data for 33,731 units, representing 58,404 bedrooms in the Hawaiian Islands.

**Figure 1: Hawai'i Vacation Rental Performance December 2024**

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2023	% Change	2024	2023	% Change	2024	2023	Percentage Pt. Change	2024	2023	% Change
<b>State of Hawai'i</b>	794,681	768,335	3.4%	413,086	410,769	0.6%	52.0%	53.5%	-1.5%	\$354.09	\$318.15	11.3%
<b>O'ahu</b>	212,413	212,666	-0.1%	116,517	117,567	-0.9%	54.9%	55.3%	-0.4%	\$294.20	\$257.51	14.2%
Waikīkī	126,792	123,146	3.0%	80,486	78,774	2.2%	63.5%	64.0%	-0.5%	\$233.11	\$218.28	6.8%
<b>Maui County</b>	247,357	233,344	6.0%	132,731	127,862	3.8%	53.7%	54.8%	-1.1%	\$425.20	\$394.21	7.9%
Wailea/Kīhei	108,349	106,264	2.0%	59,657	60,947	-2.1%	55.1%	57.4%	-2.3%	\$346.32	\$333.79	3.8%
Lahaina/Kā'anapali/ Nāpili/Kapalua	110,141	99,476	10.7%	59,256	53,892	10.0%	53.8%	54.2%	-0.4%	\$534.92	\$492.76	8.6%
<b>Island of Hawai'i</b>	196,393	194,007	1.2%	97,045	100,479	-3.4%	49.4%	51.8%	-2.4%	\$290.03	\$249.77	16.1%
Kona	96,218	98,172	-2.0%	48,444	51,358	-5.7%	50.3%	52.3%	-2.0%	\$268.36	\$259.08	3.6%
Hilo/Honoka'a	43,668	43,052	1.4%	21,101	21,924	-3.8%	48.3%	50.9%	-2.6%	\$164.43	\$142.93	15.0%
<b>Kaua'i</b>	138,518	128,318	7.9%	66,793	64,861	3.0%	48.2%	50.5%	-2.3%	\$410.29	\$384.07	6.8%

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

**Figure 2: Hawai'i Vacation Rental Performance December 2024 vs. 2019**

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2019	% Change	2024	2019	% Change	2024	2019	Percentage Pt. Change	2024	2019	% Change
<b>State of Hawai'i</b>	794,681	856,798	-7.2%	413,086	645,575	-36.0%	52.0%	75.3%	-23.4%	\$354.09	\$234.20	51.2%
<b>O'ahu</b>	212,413	237,306	-10.5%	116,517	179,700	-35.2%	54.9%	75.7%	-20.9%	\$294.20	\$191.40	53.7%
Waikīkī	126,792	120,086	5.6%	80,486	94,536	-14.9%	63.5%	78.7%	-15.2%	\$233.11	\$165.60	40.8%
<b>Maui County</b>	247,357	293,100	-15.6%	132,731	231,419	-42.6%	53.7%	79.0%	-25.3%	\$425.20	\$278.36	52.8%
Wailea/Kīhei	108,349	134,565	-19.5%	59,657	111,356	-46.4%	55.1%	82.8%	-27.7%	\$346.32	\$265.49	30.4%
Lahaina/Kā'anapali/ Nāpili/Kapalua	110,141	123,342	-10.7%	59,256	93,086	-36.3%	53.8%	75.5%	-21.7%	\$534.92	\$314.29	70.2%
<b>Island of Hawai'i</b>	196,393	204,394	-3.9%	97,045	146,841	-33.9%	49.4%	71.8%	-22.4%	\$290.03	\$181.46	59.8%
Kona	96,218	96,057	0.2%	48,444	73,055	-33.7%	50.3%	76.1%	-25.7%	\$268.36	\$150.46	78.4%
Hilo/Honoka'a	43,668	45,053	-3.1%	21,101	29,739	-29.0%	48.3%	66.0%	-17.7%	\$164.43	\$107.79	52.5%
<b>Kaua'i</b>	138,518	121,998	13.5%	66,793	87,615	-23.8%	48.2%	71.8%	-23.6%	\$410.29	\$293.75	39.7%

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 December 2024**

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2023	% Change	2024	2023	% Change	2024	2023	Percentage Pt. Change	2024	2023	% Change
<b>State of Hawai'i</b>	9,665,835	8,765,357	10.3%	5,035,648	4,896,906	2.8%	52.1%	55.9%	-6.7%	\$323.40	\$301.02	7.4%
<b>O'ahu</b>	2,675,463	2,526,816	5.9%	1,529,106	1,467,325	4.2%	57.2%	58.1%	-1.6%	\$265.40	\$241.13	10.1%
Waikiki	1,560,002	1,500,051	4.0%	1,038,273	975,489	6.4%	66.6%	65.0%	2.3%	\$214.46	\$202.60	5.9%
North Shore	294,018	288,849	1.8%	146,923	157,384	-6.6%	50.0%	54.5%	-8.3%	\$403.02	\$374.07	7.7%
Other Honolulu	223,978	218,229	2.6%	79,455	86,508	-8.2%	35.5%	39.6%	-10.5%	\$205.54	\$190.87	7.7%
Leeward/Mākaaha Side	299,558	245,926	21.8%	147,951	124,048	19.3%	49.4%	50.4%	-2.1%	\$494.51	\$394.90	25.2%
Windward Side	215,832	203,792	5.9%	83,971	88,987	-5.6%	38.9%	43.7%	-10.9%	\$336.05	\$304.99	10.2%
Ala Moana Area	63,374	56,741	11.7%	26,129	30,157	-13.4%	41.2%	53.1%	-22.4%	\$210.41	\$138.00	52.5%
Airport Area	18,701	13,228	41.4%	6,404	4,752	34.8%	34.2%	35.9%	-4.7%	\$113.50	\$107.79	5.3%
<b>Maui County</b>	2,941,309	2,535,742	16.0%	1,560,342	1,500,085	4.0%	53.0%	59.2%	-10.3%	\$389.66	\$367.77	6.0%
Wailea/Kihei	1,328,750	1,239,489	7.2%	738,732	726,652	1.7%	55.6%	58.6%	-5.2%	\$325.91	\$314.45	3.6%
Lahaina/Kā'anapali/ Nāpili/Kapalua	1,264,053	975,121	29.6%	657,417	605,593	8.6%	52.0%	62.1%	-16.3%	\$490.94	\$462.42	6.2%
Mā'alaea	141,620	121,574	16.5%	74,647	71,757	4.0%	52.7%	59.0%	-10.7%	\$281.97	\$260.40	8.3%
Kahului/Wailuku	88,181	85,145	3.6%	40,569	46,820	-13.4%	46.0%	55.0%	-16.3%	\$298.67	\$282.26	5.8%
Kula/Makawao Area	24,690	19,693	25.4%	10,368	11,195	-7.4%	42.0%	56.8%	-26.1%	\$270.71	\$243.04	11.4%
Hāna Area	19,729	20,534	-3.9%	13,032	13,954	-6.6%	66.1%	68.0%	-2.8%	\$377.05	\$375.49	0.4%
<b>Island of Maui</b>	2,867,023	2,461,556	16.5%	1,534,765	1,475,971	4.0%	53.5%	60.0%	-10.7%	\$393.81	\$371.54	6.0%
Moloka'i	72,138	72,239	-0.1%	24,678	22,856	8.0%	34.2%	31.6%	8.1%	\$136.55	\$131.06	4.2%
Lāna'i	2,148	1,947	10.3%	899	1,258	-28.5%	41.9%	64.6%	-35.2%	\$254.99	\$240.92	5.8%
<b>Island of Hawai'i</b>	2,451,218	2,289,010	7.1%	1,141,164	1,150,061	-0.8%	46.6%	50.2%	-7.3%	\$261.60	\$238.62	9.6%
Kona	1,228,170	1,157,934	6.1%	567,822	585,323	-3.0%	46.2%	50.5%	-8.5%	\$253.33	\$238.99	6.0%
Kohala/Waimea/Kawaihae	536,004	486,039	10.3%	253,273	245,790	3.0%	47.3%	50.6%	-6.6%	\$414.59	\$362.86	14.3%
Hilo/Honoka'a	534,210	506,791	5.4%	251,374	249,806	0.6%	47.1%	49.3%	-4.5%	\$154.02	\$138.82	10.9%
Volcano Area	127,768	112,506	13.6%	58,669	56,995	2.9%	45.9%	50.7%	-9.4%	\$161.59	\$156.47	3.3%
Nā'ālehu /Ka'u	25,066	25,740	-2.6%	10,026	12,147	-17.5%	40.0%	47.2%	-15.2%	\$147.42	\$144.19	2.2%
<b>Kaua'i</b>	1,597,845	1,413,789	13.0%	805,036	779,435	3.3%	50.4%	55.1%	-8.6%	\$392.76	\$377.35	4.1%
Princeville/Hanalei	694,830	612,866	13.4%	318,874	311,115	2.5%	45.9%	50.8%	-9.6%	\$370.48	\$348.31	6.4%
Po'ipū/Kukui'ula	462,408	416,854	10.9%	271,166	259,470	4.5%	58.6%	62.2%	-5.8%	\$480.96	\$464.18	3.6%
Wailua/Kapa'a	278,395	245,552	13.4%	144,037	140,501	2.5%	51.7%	57.2%	-9.6%	\$317.75	\$308.50	3.0%
Līhu'e	148,837	126,072	18.1%	63,679	60,842	4.7%	42.8%	48.3%	-11.3%	\$304.91	\$319.65	-4.6%
Kalāheo/Waimea	13,009	12,080	7.7%	7,280	7,507	-3.0%	56.0%	62.1%	-9.9%	\$335.81	\$336.17	-0.1%

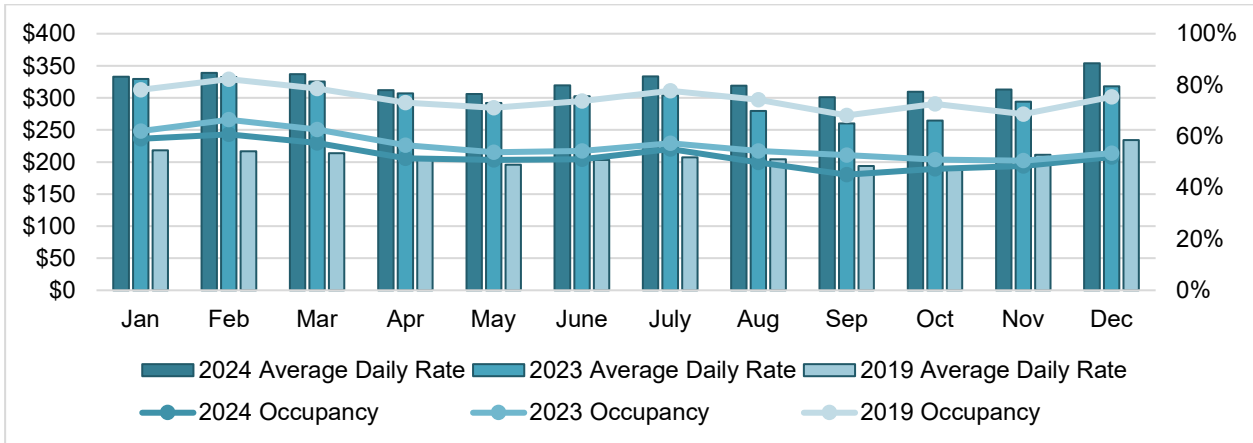
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**Figure 4: Hawai'i Vacation Rental Performance Year-to-Date December 2024 vs. 2019**

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2019	% Change	2024	2019	% Change	2024	2019	Percentage Pt. Change	2024	2019	% Change
<b>State of Hawai'i</b>	9,665,835	10,246,122	-5.7%	5,035,648	7,595,838	-33.7%	52.1%	74.1%	-29.7%	\$323.40	\$207.50	55.9%
<b>O'ahu</b>	2,675,463	3,231,022	-17.2%	1,529,106	2,416,639	-36.7%	57.2%	74.8%	-23.6%	\$265.40	\$168.15	57.8%
Waikīkī	1,560,002	1,414,370	10.3%	1,038,273	1,108,206	-6.3%	66.6%	78.4%	-15.1%	\$214.46	\$146.58	46.3%
North Shore	294,018	480,843	-38.9%	146,923	353,784	-58.5%	50.0%	73.6%	-32.1%	\$403.02	\$194.06	107.7%
Other Honolulu	223,978	432,417	-48.2%	79,455	302,487	-73.7%	35.5%	70.0%	-49.3%	\$205.54	\$166.06	23.8%
Leeward/Mākaaha Side	299,558	382,291	-21.6%	147,951	271,599	-45.5%	49.4%	71.0%	-30.5%	\$494.51	\$210.75	134.6%
Windward Side	215,832	433,091	-50.2%	83,971	318,278	-73.6%	38.9%	73.5%	-47.1%	\$336.05	\$191.44	75.5%
Ala Moana Area	63,374	51,722	22.5%	26,129	35,799	-27.0%	41.2%	69.2%	-40.4%	\$210.41	\$129.62	62.3%
Airport Area	18,701	36,288	-48.5%	6,404	26,486	-75.8%	34.2%	73.0%	-53.1%	\$113.50	\$83.59	35.8%
<b>Maui County</b>	2,941,309	3,249,187	-9.5%	1,560,342	2,557,497	-39.0%	53.0%	78.7%	-32.6%	\$389.66	\$248.01	57.1%
Wailea/Kthei	1,328,750	1,529,555	-13.1%	738,732	1,227,366	-39.8%	55.6%	80.2%	-30.7%	\$325.91	\$239.15	36.3%
Lahaina/Kā'anapali/ Nāpili/Kapalua	1,264,053	1,317,351	-4.0%	657,417	1,026,383	-35.9%	52.0%	77.9%	-33.2%	\$490.94	\$276.84	77.3%
Mā'alaea	141,620	130,718	8.3%	74,647	107,000	-30.2%	52.7%	81.9%	-35.6%	\$281.97	\$190.34	48.1%
Kahului/Wailuku	88,181	115,030	-23.3%	40,569	89,266	-54.6%	46.0%	77.6%	-40.7%	\$298.67	\$200.57	48.9%
Kula/Makawao Area	24,690	31,117	-20.7%	10,368	23,255	-55.4%	42.0%	74.7%	-43.8%	\$270.71	\$188.75	43.4%
Hāna Area	19,729	27,838	-29.1%	13,032	23,346	-44.2%	66.1%	83.9%	-21.2%	\$377.05	\$270.18	39.6%
Island of Maui	2,867,023	3,151,609	-9.0%	1,534,765	2,496,616	-38.5%	53.5%	79.2%	-32.4%	\$393.81	\$250.99	56.9%
Moloka'i	72,138	92,762	-22.2%	24,678	57,800	-57.3%	34.2%	62.3%	-45.1%	\$136.55	\$119.72	14.1%
Lāna'i	2,148	4,816	-55.4%	899	3,081	-70.8%	41.9%	64.0%	-34.6%	\$254.99	\$239.61	6.4%
<b>Island of Hawai'i</b>	2,451,218	2,332,287	5.1%	1,141,164	1,546,702	-26.2%	46.6%	66.3%	-29.8%	\$261.60	\$162.86	60.6%
Kona	1,228,170	1,123,310	9.3%	567,822	798,227	-28.9%	46.2%	71.1%	-34.9%	\$253.33	\$135.29	87.2%
Kohala/Waimea/Kawaihae	536,004	571,333	-6.2%	253,273	377,105	-32.8%	47.3%	66.0%	-28.4%	\$414.59	\$282.92	46.5%
Hilo/Honoka'a	534,210	468,834	13.9%	251,374	275,626	-8.8%	47.1%	58.8%	-20.0%	\$154.02	\$95.68	61.0%
Volcano Area	127,768	130,651	-2.2%	58,669	73,816	-20.5%	45.9%	56.5%	-18.7%	\$161.59	\$114.01	41.7%
Nā'ālehu /Ka'ū	25,066	38,159	-34.3%	10,026	21,928	-54.3%	40.0%	57.5%	-30.4%	\$147.42	\$110.53	33.4%
<b>Kaua'i</b>	1,597,845	1,433,626	11.5%	805,036	1,075,000	-25.1%	50.4%	75.0%	-32.8%	\$392.76	\$263.81	48.9%
Princeville/Hanalei	694,830	566,610	22.6%	318,874	425,666	-25.1%	45.9%	75.1%	-38.9%	\$370.48	\$265.97	39.3%
Po'ipū/Kukui'ula	462,408	519,226	-10.9%	271,166	387,595	-30.0%	58.6%	74.6%	-21.4%	\$480.96	\$304.89	57.7%
Wailua/Kapa'a	278,395	240,017	16.0%	144,037	180,732	-20.3%	51.7%	75.3%	-31.3%	\$317.75	\$197.68	60.7%
Līhu'e	148,837	83,582	78.1%	63,679	62,548	1.8%	42.8%	74.8%	-42.8%	\$304.91	\$188.77	61.5%
Kalāheo/Waimea	13,009	23,674	-45.0%	7,280	18,259	-60.1%	56.0%	77.1%	-27.4%	\$335.81	\$254.21	32.1%

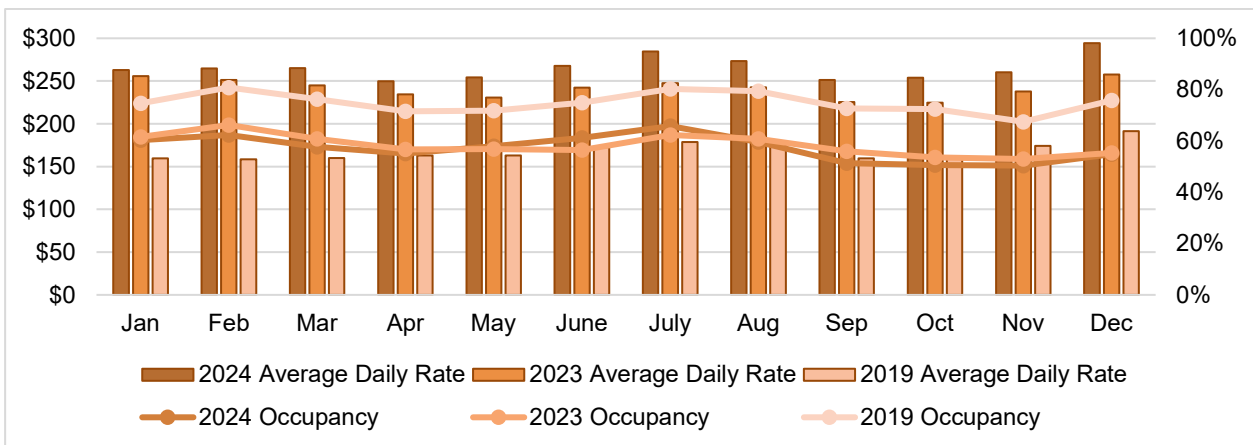
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**Figure 5: Monthly State of Hawai'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019**



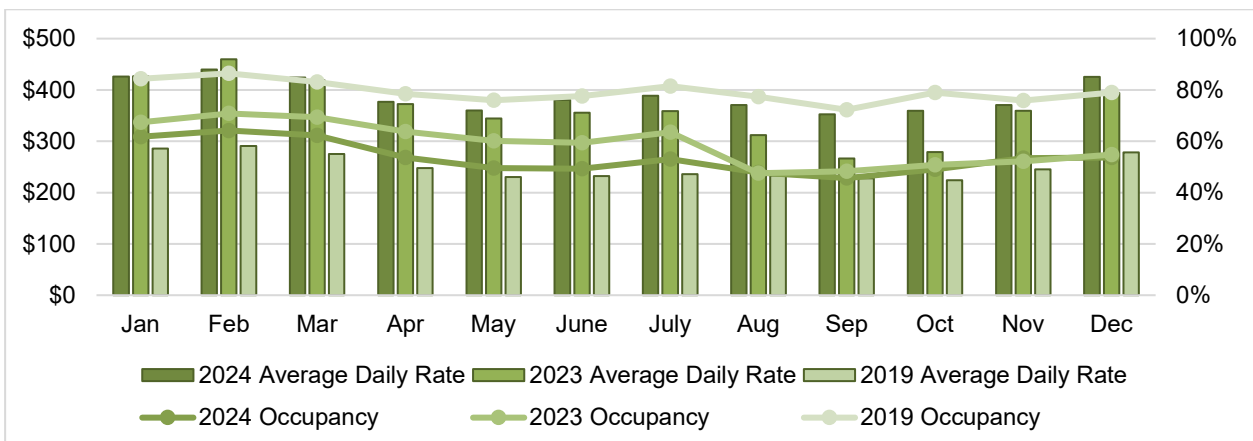
Source: Lighthouse Intelligence, Ltd.  
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**Figure 6: Monthly O'ahu Vacation Rental Performance - 2024 vs. 2023 vs. 2019**



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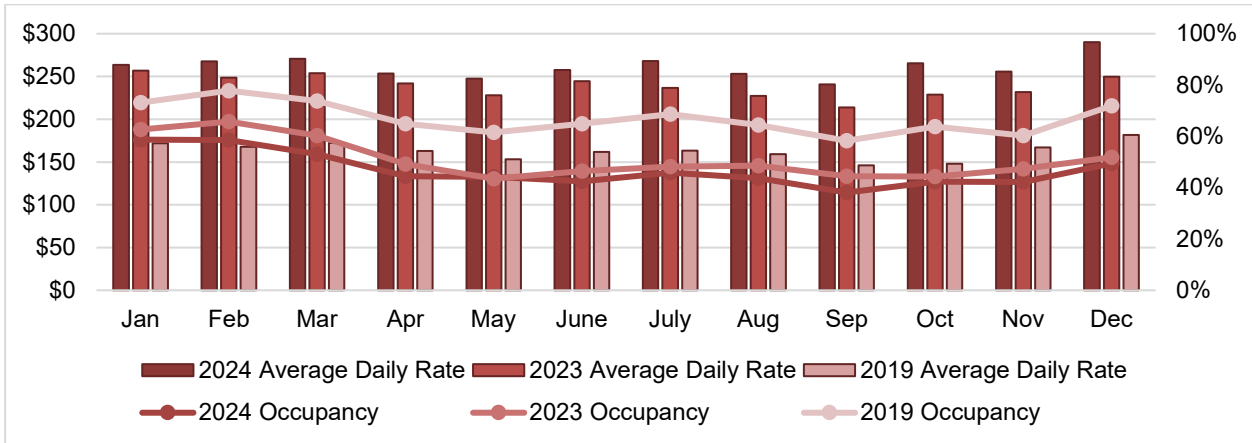
**Figure 7: Monthly Maui County Vacation Rental Performance - 2024 vs. 2023 vs. 2019**



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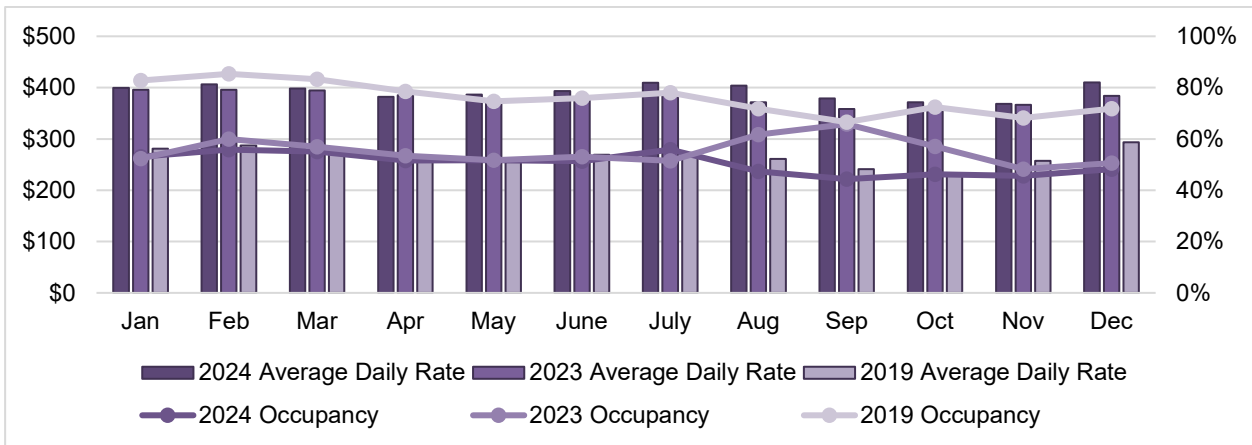


**Figure 8: Monthly Island of Hawai'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019**



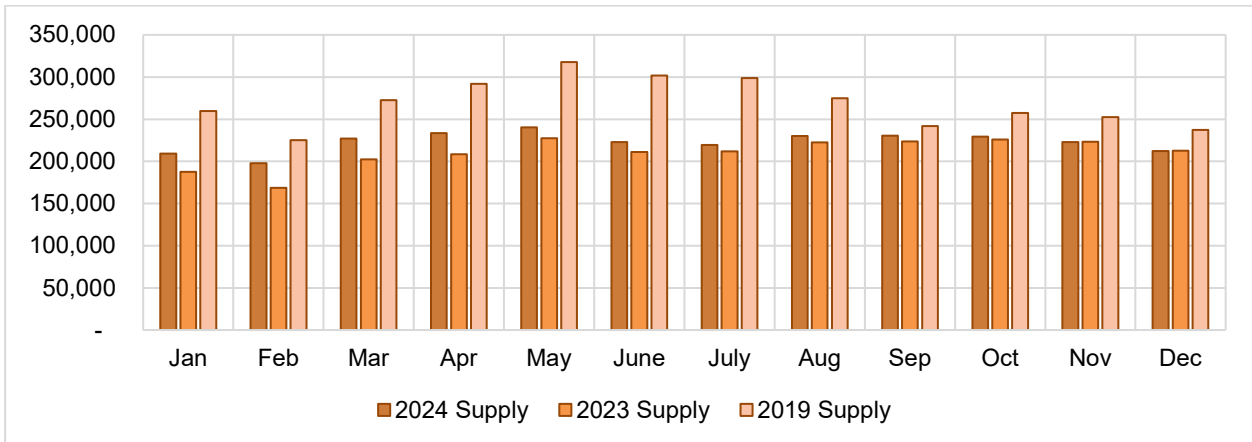
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**Figure 9: Monthly Kaua'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019**



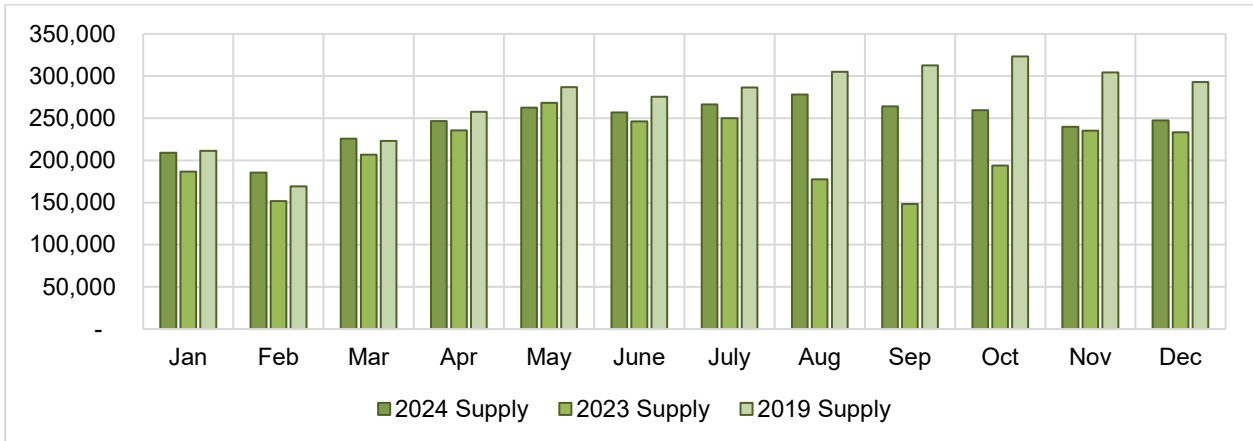
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**Figure 10: Monthly O'ahu Unit Night Supply - 2024 vs. 2023 vs. 2019**



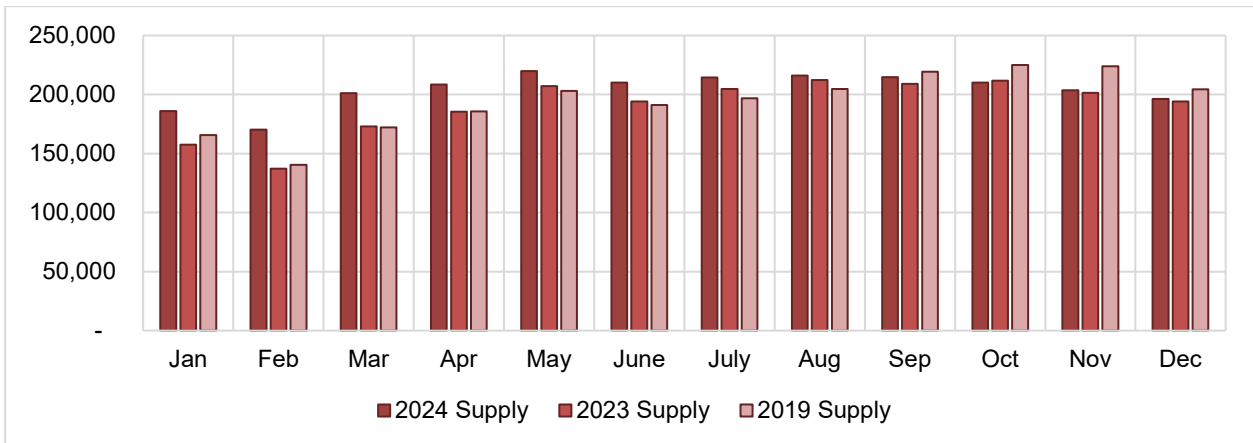
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**Figure 11: Monthly Maui County Unit Night Supply - 2024 vs. 2023 vs. 2019**



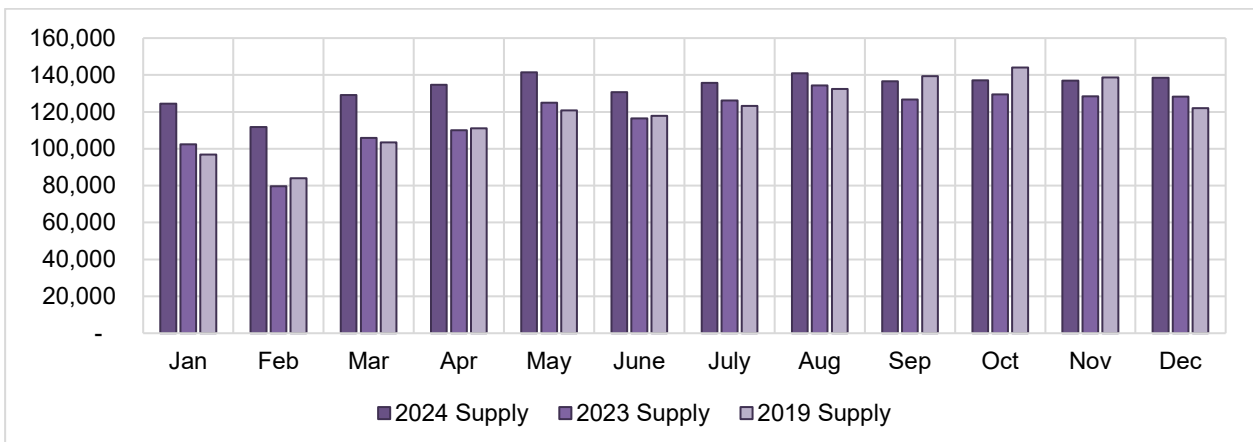
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**Figure 12: Monthly Island of Hawai'i Unit Night Supply - 2024 vs. 2023 vs. 2019**



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**Figure 13: Monthly Kaua'i Unit Night Supply - 2024 vs. 2023 vs. 2019**



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