



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

June 2026 Hawai'i Vacation Rental Performance Report

Vacation rentals across Hawai'i reported increases in supply, demand, occupancy rate and average daily rate (ADR) in June 2026 when compared to June 2025.

In June 2026, the total monthly supply of statewide vacation rentals was 949,200 unit nights (+0.6%) and monthly demand was 472,300 unit nights (+8.0%) (Figure 1). This combination resulted in an average monthly unit occupancy of 49.8 percent (+3.4 percentage points) for June. Occupancy for Hawai'i's hotels was 78.7 percent in June 2026.

The ADR for vacation rental units statewide in June was \$534 (+14.5%). By comparison, the ADR for hotels was \$384 in June 2026. 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 2026, Maui County had the largest vacation rental supply at 327,400 available unit nights (+8.2%). Unit demand was 164,300 unit nights (+20.9%), resulting in 50.2 percent occupancy (+5.3 percentage points) and ADR at \$652 (+22.3%). For June 2026, Maui County hotels reported ADR at \$563 and occupancy of 71.8 percent.

O'ahu vacation rental supply was 235,800 available unit nights (-6.0%). Unit demand was 126,600 unit nights (-3.2%), resulting in 53.7 percent occupancy (+1.6 percentage points) with ADR at \$416 (+1.4%). In comparison, O'ahu hotels reported ADR at \$292 and occupancy of 83.6 percent for June 2026.

The island of Hawai'i vacation rental supply was 235,600 available unit nights (+0.4%) in June. Unit demand was 101,000 unit nights (+7.9%), resulting in 42.9 percent occupancy (+3.0 percentage points) with ADR at \$420 (+10.5%). Hawai'i Island hotels reported ADR at \$475 and occupancy of 68.4 percent.

Kaua'i had the fewest number of available vacation rental unit nights in June at 150,400 (-3.0%). Unit demand was 80,400 unit nights (+4.2%), resulting in 53.5 percent occupancy

(+3.7 percentage points) with ADR at \$620 (+13.6%). Kaua'i hotels reported ADR at \$450 and occupancy of 80.0 percent.

First Half 2026

For the first half of 2026, Hawai'i vacation rental supply was 5.6 million unit nights (+7.0%) and demand was 3.0 million unit nights (+8.5%). 2026 average daily unit rate was \$518 (+3.7%). Statewide vacation rental occupancy for the first half of 2026 was 53.8 percent (+1.3 percentage points). In comparison, statewide hotel ADR for the first half of 2026 was \$373 and occupancy was 75.9 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. Note on Pricing Methodology: to reflect recent changes in industry standards, Lighthouse is now reporting vacation rental prices using the 'Total Rate' metric. This metric represents a single price that includes all additional fees and costs (such as cleaning or service fees). To ensure data comparability, all historical data from January 1, 2019, has been reprocessed under this new methodology.

In July 2026, Lighthouse rolled out a major upgrade to its STR cross-listing algorithm, introducing an AI-powered methodology that improves the accuracy of property deduplication across all tracked platforms, including smarter handling of Airbnb listings and more granular unit-level tracking on Booking.com. As part of this update, historical data has been restated from January 2026 to align with the new methodology. Any shifts in supply figures reflect greater precision in the data, not changes in the market itself.

Currently, the reservation systems data provided by data partners represent about 37.3 percent of the estimated total unique vacation rental properties in the State of Hawai'i. On a county level, reservation system data represents 31.5 percent of Maui County coverage; 43.4 percent of Honolulu County coverage; 39.0 percent of Hawai'i County coverage; and

35.6 percent of Kaua'i County coverage of the estimated number of unique vacation rental properties.

For June 2026, the report included data for 38,857 units, representing 66,396 bedrooms in the Hawaiian Islands.

Figure 1: Hawai'i Vacation Rental Performance June 2026

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2026	2025	% Change	2026	2025	% Change	2026	2025	Percentage Pt. Change	2026	2025	% Change
State of Hawai'i	949,218	943,276	0.6%	472,342	437,497	8.0%	49.8%	46.4%	3.4%	\$533.78	\$465.98	14.5%
O'ahu	235,773	250,920	-6.0%	126,552	130,763	-3.2%	53.7%	52.1%	1.6%	\$415.76	\$409.86	1.4%
Waikīkī	146,840	146,510	0.2%	85,389	86,934	-1.8%	58.2%	59.3%	-1.2%	\$345.53	\$347.42	-0.5%
Maui County	327,406	302,667	8.2%	164,309	135,850	20.9%	50.2%	44.9%	5.3%	\$652.02	\$533.31	22.3%
Wailea/Kīhei	149,268	138,968	7.4%	72,018	62,128	15.9%	48.2%	44.7%	3.5%	\$453.35	\$424.17	6.9%
Lahaina/Kā'anapali/ Nāpili/Kapalua	149,269	130,380	14.5%	79,976	61,722	29.6%	53.6%	47.3%	6.2%	\$866.85	\$668.17	29.7%
Island of Hawai'i	235,628	234,638	0.4%	101,043	93,651	7.9%	42.9%	39.9%	3.0%	\$420.48	\$380.59	10.5%
Kona	118,452	116,328	1.8%	49,375	46,152	7.0%	41.7%	39.7%	2.0%	\$363.31	\$332.38	9.3%
Hilo/Honoka'a	43,361	47,002	-7.7%	19,293	18,772	2.8%	44.5%	39.9%	4.6%	\$268.57	\$257.95	4.1%
Kaua'i	150,411	155,052	-3.0%	80,438	77,233	4.2%	53.5%	49.8%	3.7%	\$620.27	\$546.12	13.6%

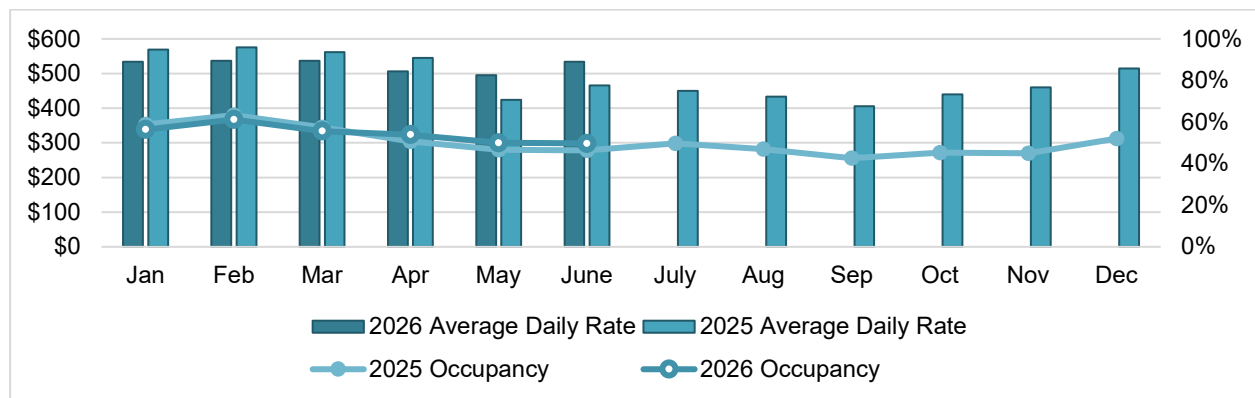
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Figure 2: Hawai'i Vacation Rental Performance Year-to-Date June 2026

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2026	2025	% Change	2026	2025	% Change	2026	2025	Percentage Pt. Change	2026	2025	% Change
State of Hawai'i	5,634,822	5,264,400	7.0%	3,033,805	2,796,731	8.5%	53.8%	53.1%	1.3%	\$517.93	\$499.47	3.7%
O'ahu	1,481,324	1,431,122	3.5%	837,402	810,124	3.4%	56.5%	56.6%	-0.1%	\$412.45	\$410.42	0.5%
Waikiki	906,715	843,184	7.5%	564,511	542,544	4.0%	62.3%	64.3%	-3.2%	\$350.99	\$336.73	4.2%
North Shore	136,099	146,915	-7.4%	66,420	72,920	-8.9%	48.8%	49.6%	-1.7%	\$613.72	\$633.47	-3.1%
Other Honolulu	131,972	132,258	-0.2%	61,211	53,166	15.1%	46.4%	40.2%	15.4%	\$324.99	\$331.85	-2.1%
Leeward/Māhaha Side	176,098	166,721	5.6%	89,746	86,722	3.5%	51.0%	52.0%	-2.0%	\$749.33	\$756.18	-0.9%
Windward Side	81,237	98,913	-17.9%	32,123	34,293	-6.3%	39.5%	34.7%	14.1%	\$387.59	\$414.29	-6.4%
Ala Moana Area	42,604	38,479	10.7%	21,547	18,929	13.8%	50.6%	49.2%	2.8%	\$305.58	\$290.84	5.1%
Airport Area	6,600	4,653	41.8%	1,846	1,551	19.0%	28.0%	33.3%	-16.1%	\$170.18	\$435.75	-60.9%
Maui County	1,845,518	1,631,987	13.1%	991,658	870,176	14.0%	53.7%	53.3%	0.8%	\$635.58	\$597.73	6.3%
Wailea/Kihei	829,702	730,230	13.6%	450,027	400,250	12.4%	54.2%	54.8%	-1.0%	\$493.45	\$490.24	0.7%
Lahaina/Kā'anapali/Nāpili/Kapalua	836,086	720,065	16.1%	456,328	384,073	18.8%	54.6%	53.3%	2.3%	\$815.08	\$745.24	9.4%
Mā'alaea	75,223	70,147	7.2%	40,930	38,148	7.3%	54.4%	54.4%	0.1%	\$477.38	\$475.92	0.3%
Kahului/Wailuku	44,911	47,077	-4.6%	21,142	21,319	-0.8%	47.1%	45.3%	4.0%	\$453.04	\$505.21	-10.3%
Kula/Makawao Area	10,440	13,583	-23.1%	4,135	5,607	-26.3%	39.6%	41.3%	-4.1%	\$371.63	\$372.27	-0.2%
Hāna Area	10,117	10,811	-6.4%	6,483	7,640	-15.1%	64.1%	70.7%	-9.3%	\$424.42	\$504.84	-15.9%
<i>Island of Maui</i>	<i>1,806,477</i>	<i>1,591,914</i>	<i>13.5%</i>	<i>979,045</i>	<i>857,038</i>	<i>14.2%</i>	<i>54.2%</i>	<i>53.8%</i>	<i>0.7%</i>	<i>\$640.84</i>	<i>\$603.61</i>	<i>6.2%</i>
<i>Moloka'i</i>	<i>37,829</i>	<i>38,455</i>	<i>-1.6%</i>	<i>12,307</i>	<i>12,667</i>	<i>-2.8%</i>	<i>32.5%</i>	<i>32.9%</i>	<i>-1.2%</i>	<i>\$221.09</i>	<i>\$205.90</i>	<i>7.4%</i>
<i>Lāna'i</i>	<i>1,212</i>	<i>1,618</i>	<i>-25.1%</i>	<i>306</i>	<i>472</i>	<i>-35.0%</i>	<i>25.3%</i>	<i>29.1%</i>	<i>-13.2%</i>	<i>\$472.91</i>	<i>\$431.66</i>	<i>9.6%</i>
Island of Hawai'i	1,365,660	1,298,428	5.2%	692,856	640,552	8.2%	50.7%	49.3%	2.8%	\$413.39	\$414.18	-0.2%
Kona	690,340	641,507	7.6%	340,730	316,471	7.7%	49.4%	49.3%	0.0%	\$376.41	\$376.22	0.0%
Kohala/Waimea/Kawaihae	332,330	307,071	8.2%	168,257	148,545	13.3%	50.6%	48.4%	4.7%	\$661.30	\$689.11	-4.0%
Hilo/Honoka'a	261,008	271,710	-3.9%	139,936	135,098	3.6%	53.6%	49.7%	7.8%	\$253.72	\$249.51	1.7%
Volcano Area	67,426	63,116	6.8%	38,046	33,938	12.1%	56.4%	53.8%	4.9%	\$260.83	\$253.68	2.8%
Nā'ālehu/Ka'ū	14,557	15,024	-3.1%	5,885	6,500	-9.5%	40.4%	43.3%	-6.6%	\$249.19	\$240.29	3.7%
Kaua'i	942,320	902,862	4.4%	511,890	475,878	7.6%	54.3%	52.7%	3.1%	\$604.09	\$586.18	3.1%
Princeville/Hanalei	402,548	380,872	5.7%	211,320	198,278	6.6%	52.5%	52.1%	0.8%	\$576.49	\$556.32	3.6%
Po'ipū/Kukui'ula	279,256	256,690	8.8%	168,044	150,707	11.5%	60.2%	58.7%	2.5%	\$715.15	\$716.31	-0.2%
Wailua/Kapa'a	163,550	152,686	7.1%	91,063	81,914	11.2%	55.7%	53.6%	3.8%	\$471.35	\$457.80	3.0%
Līhu'e	90,180	105,002	-14.1%	36,714	39,914	-8.0%	40.7%	38.0%	7.1%	\$582.64	\$494.11	17.9%
Kalāheo/Waimea	6,787	7,611	-10.8%	4,749	5,064	-6.2%	70.0%	66.5%	5.2%	\$613.56	\$685.45	-10.5%

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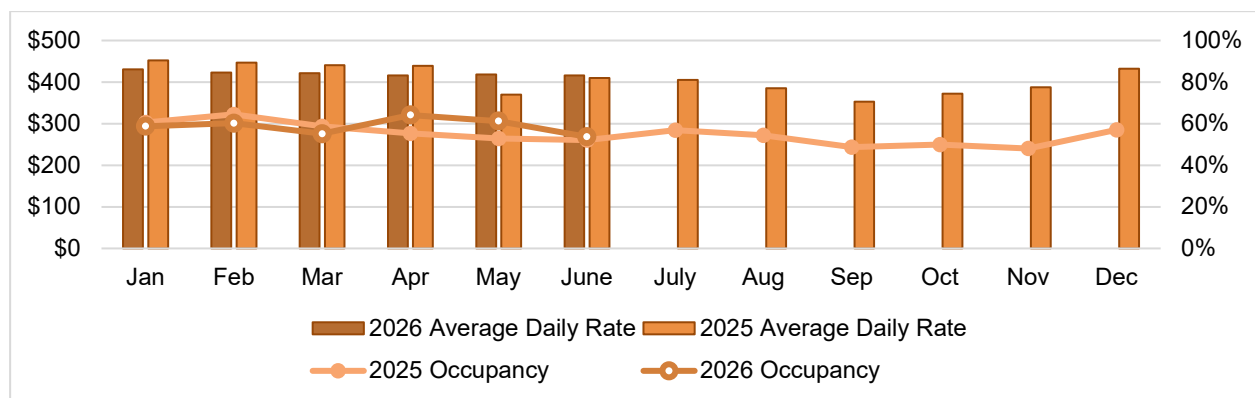
Figure 3: Monthly State of Hawai'i Vacation Rental Performance - 2026 vs. 2025



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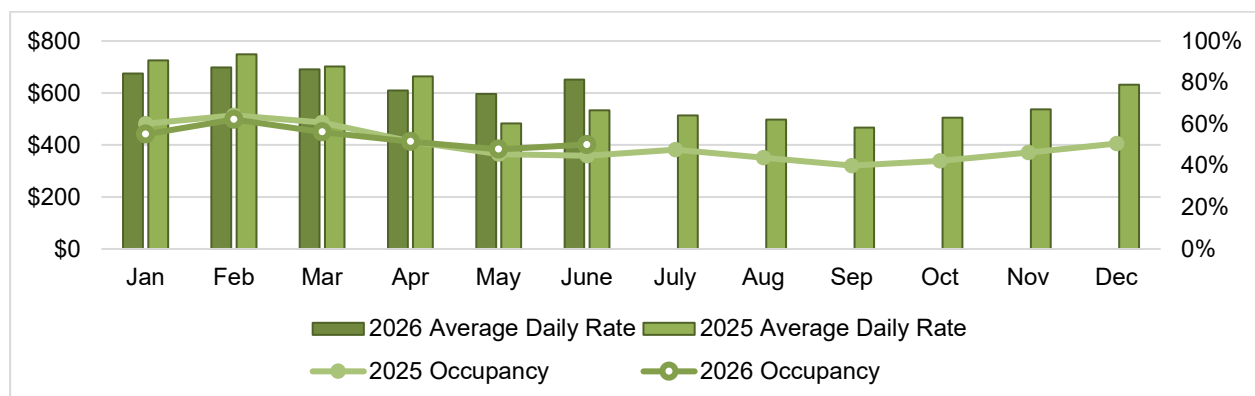
Figure 4: Monthly O'ahu Vacation Rental Performance - 2026 vs. 2025



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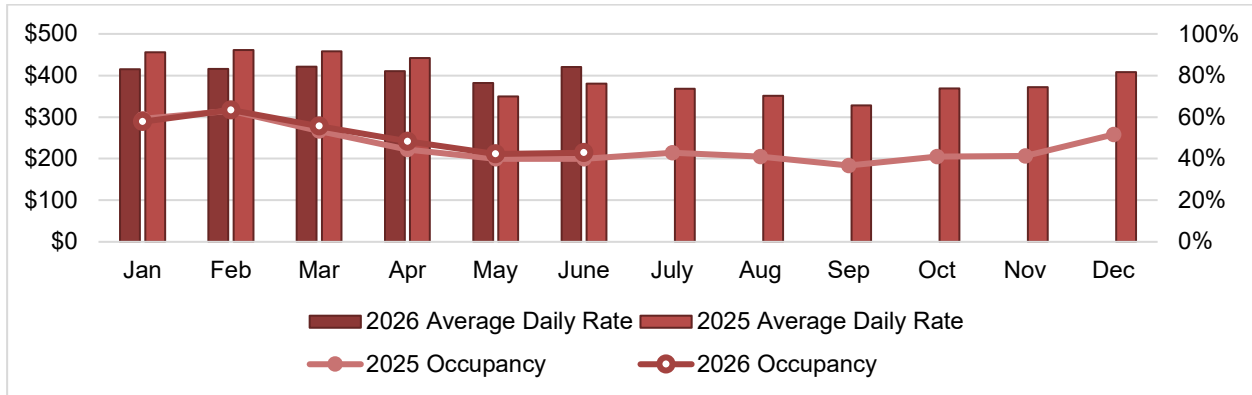
Figure 5: Monthly Maui County Vacation Rental Performance - 2026 vs. 2025



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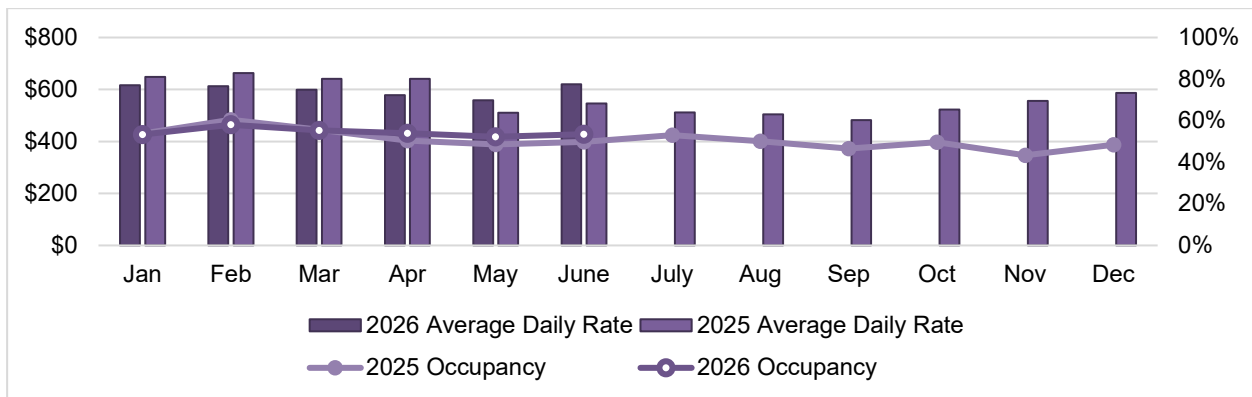
Figure 6: Monthly Island of Hawai'i Vacation Rental Performance - 2026 vs. 2025



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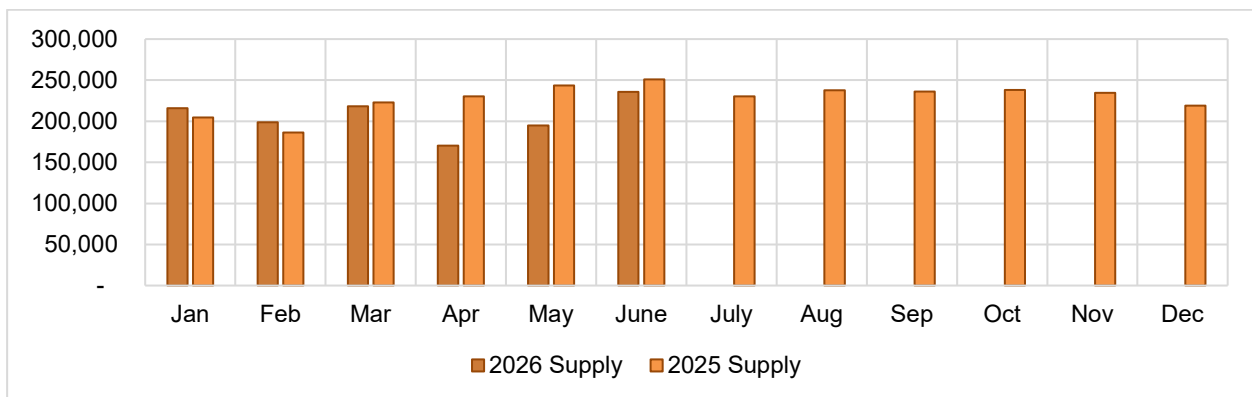
Figure 7: Monthly Kaua'i Vacation Rental Performance - 2026 vs. 2025



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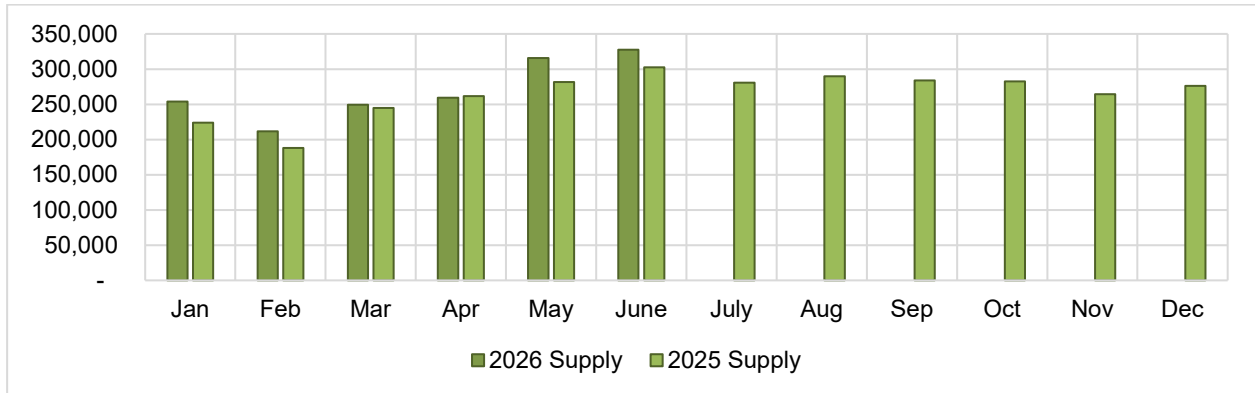
Figure 8: Monthly O'ahu Unit Night Supply - 2026 vs. 2025



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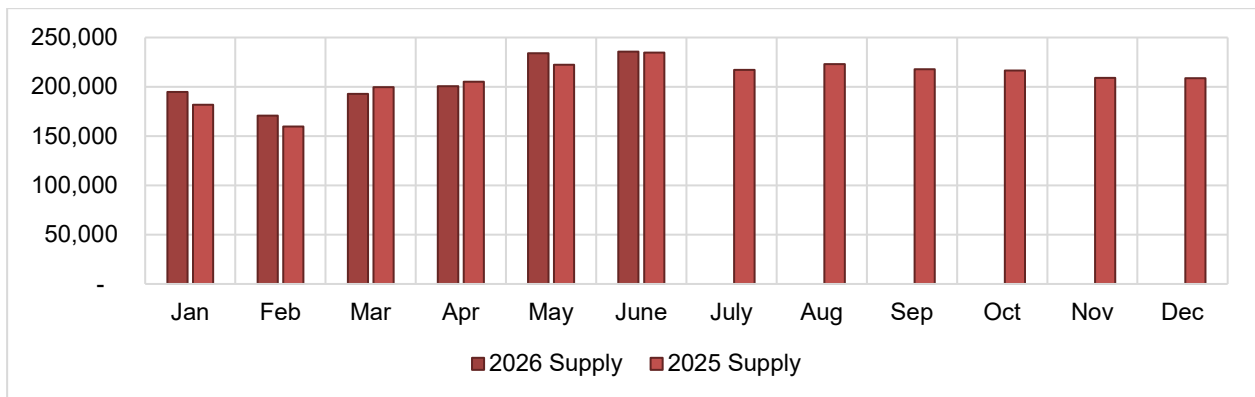
Figure 9: Monthly Maui County Unit Night Supply - 2026 vs. 2025



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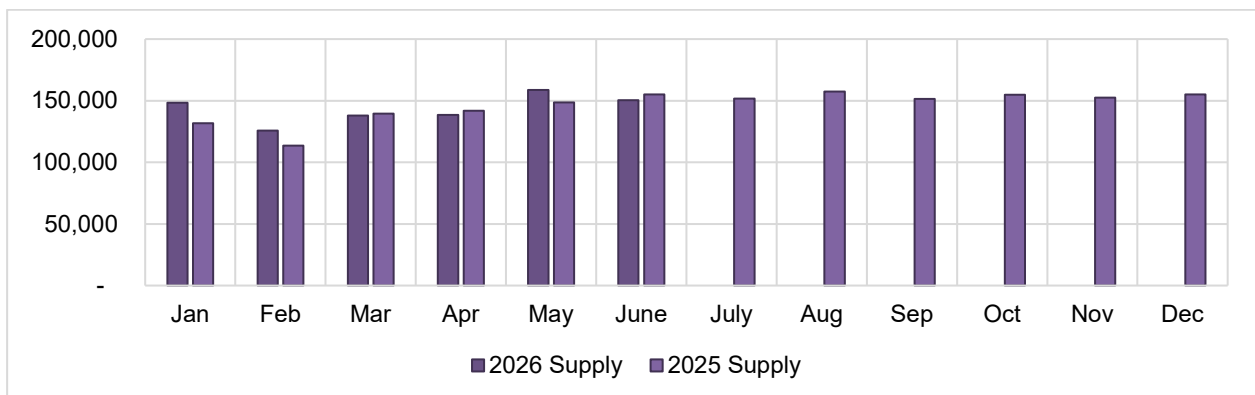
Figure 10: Monthly Island of Hawai'i Unit Night Supply - 2026 vs. 2025



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Figure 11: Monthly Kaua'i Unit Night Supply - 2026 vs. 2025



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