



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

October 2025 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported higher occupancy, average daily rate (ADR) and revenue per available room (RevPAR) in October 2025 compared to October 2024.

Statewide RevPAR in October 2025 was \$234 (+3.5%), with ADR at \$322 (+0.1%) and occupancy of 72.8 percent (+2.4 percentage points) compared to October 2024 (Figure 1).

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 October 2025, the survey included 159 properties representing 47,609 rooms, or 83.7 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 \$413.0 million (+4.0%) in October 2025. Room demand was 1.28 million room nights (+3.9%) and room supply was 1.76 million room nights (+0.5%) (Figure 2).

Luxury Class properties earned RevPAR of \$459 (+13.9%), with ADR at \$721 (+2.6%) and occupancy of 63.7 percent (+6.3 percentage points). Midscale & Economy Class properties earned RevPAR of \$148 (-1.1%) with ADR at \$198 (-1.9%) and occupancy of 74.7 percent (+0.6 percentage points).

Maui County hotels continued to be impacted by the August 8, 2023, wildfires. Maui County hotels achieved RevPAR of \$284 (+11.8%), with ADR at \$434 (-6.6%) and occupancy of 65.6 percent (+10.8 percentage points). Maui's luxury resort region of Wailea had RevPAR of \$451 (+18.9%), with ADR at \$610 (-4.6%) and occupancy of 74.0 percent (+14.6 percentage points). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$228 (+12.5%), ADR at \$349 (-9.8%) and occupancy of 65.3 percent (+12.9 percentage points).

Kaua'i hotels led the counties in October 2025 RevPAR at \$292 (+5.1%), with ADR at \$384 (+2.3%) and occupancy of 76.0 percent (+2.0 percentage points).

Hotels on the island of Hawai'i reported RevPAR at \$240 (-2.5%), with ADR at \$376 (+0.3%), and occupancy of 63.9 percent (-1.9 percentage points). Kohala Coast hotels earned RevPAR of \$298 (-6.7%), with ADR at \$489 (+1.5%), and occupancy of 60.9 percent (-5.3 percentage points).

O'ahu hotels reported RevPAR of \$202 (+0.2%) in October, ADR at \$261 (+0.4%) and occupancy of 77.3 percent (-0.2 percentage points). Waikīkī hotels earned RevPAR of \$195 (-0.3%), with ADR at \$248 (-0.9%) and occupancy of 78.5 percent (+0.5 percentage points).

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 October 2025, the survey included 159 properties representing 47,609 rooms, or 83.7 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The October survey included 83 properties on O'ahu, representing 29,861 rooms (95.2%); 38 properties in the County of Maui, representing 9,347 rooms (69.1%); 20 properties on the island of Hawai'i, representing 5,062 rooms (73.9%); and 18 properties on Kaua'i, representing 3,339 rooms (65.0%).

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 October 2025

	Occupancy %			Average Daily Rate			RevPAR		
	2025	2024	Percentage Pt. Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	72.8%	70.4%	2.4%	\$321.79	\$321.41	0.1%	\$234.24	\$226.33	3.5%
Luxury Class	63.7%	57.3%	6.3%	\$720.83	\$702.76	2.6%	\$458.85	\$402.86	13.9%
Upper Upscale Class	75.8%	72.4%	3.3%	\$295.83	\$300.60	-1.6%	\$224.13	\$217.78	2.9%
Upscale Class	72.5%	74.9%	-2.4%	\$212.81	\$232.66	-8.5%	\$154.20	\$174.19	-11.5%
Upper Midscale Class	70.8%	69.9%	0.9%	\$182.67	\$190.85	-4.3%	\$129.39	\$133.46	-3.0%
Midscale & Economy Class	74.7%	74.1%	0.6%	\$198.29	\$202.17	-1.9%	\$148.21	\$149.88	-1.1%
O'ahu	77.3%	77.5%	-0.2%	\$261.15	\$260.15	0.4%	\$201.92	\$201.60	0.2%
Waikiki	78.5%	78.0%	0.5%	\$248.32	\$250.64	-0.9%	\$194.88	\$195.49	-0.3%
Other O'ahu	71.4%	74.9%	-3.5%	\$333.29	\$310.82	7.2%	\$237.89	\$232.83	2.2%
O'ahu Luxury	54.3%	56.2%	-1.9%	\$678.51	\$628.14	8.0%	\$368.27	\$352.95	4.3%
O'ahu Upper Upscale	81.8%	79.2%	2.7%	\$269.76	\$270.84	-0.4%	\$220.78	\$214.48	2.9%
O'ahu Upscale	75.9%	83.5%	-7.6%	\$197.10	\$201.16	-2.0%	\$149.68	\$168.00	-10.9%
O'ahu Upper Midscale	74.1%	76.4%	-2.4%	\$154.66	\$165.67	-6.6%	\$114.55	\$126.64	-9.5%
O'ahu Midscale & Economy	77.9%	78.9%	-1.0%	\$137.91	\$145.40	-5.1%	\$107.41	\$114.66	-6.3%
Maui County	65.6%	54.8%	10.8%	\$433.55	\$464.08	-6.6%	\$284.35	\$254.41	11.8%
Wailea	74.0%	59.4%	14.6%	\$610.21	\$639.66	-4.6%	\$451.40	\$379.78	18.9%
Lahaina/Kā'anapali/Kapalua	65.3%	52.4%	12.9%	\$349.49	\$387.28	-9.8%	\$228.27	\$202.91	12.5%
Other Maui County	65.9%	57.6%	8.3%	\$525.18	\$542.95	-3.3%	\$346.02	\$312.51	10.7%
Maui County Luxury	68.0%	52.5%	15.4%	\$738.46	\$772.67	-4.4%	\$501.80	\$405.74	23.7%
Maui County Upper Upscale & Upscale	65.2%	55.7%	9.5%	\$331.47	\$368.13	-10.0%	\$216.15	\$205.01	5.4%
Island of Hawai'i	63.9%	65.8%	-1.9%	\$375.58	\$374.31	0.3%	\$239.87	\$246.13	-2.5%
Kohala Coast	60.9%	66.3%	-5.3%	\$488.73	\$481.40	1.5%	\$297.83	\$319.05	-6.7%
Kauai	76.0%	74.0%	2.0%	\$384.27	\$375.77	2.3%	\$292.17	\$278.04	5.1%

Source: STR, Inc. © Copyright 2025 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.

Figure 2: Hawai'i Hotel Performance by Measure October 2025

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	1,763.1	1,754.5	0.5%	1,283.4	1,235.5	3.9%	413.0	397.1	4.0%
O'ahu	972.3	972.0	0.0%	751.8	753.2	-0.2%	196.3	196.0	0.2%
Waikiki	813.3	813.0	0.0%	638.2	634.1	0.7%	158.5	158.9	-0.3%
Maui County	419.1	415.8	0.8%	274.9	227.9	20.6%	119.2	105.8	12.7%
Wailea	79.2	78.8	0.5%	58.6	46.8	25.2%	35.7	29.9	19.4%
Lahaina/Kā'anapali/ Kapalua	219.5	220.4	-0.4%	143.4	115.5	24.1%	50.1	44.7	12.0%
Island of Hawai'i	212.4	206.9	2.7%	135.7	136.1	-0.3%	51.0	50.9	0.0%
Kohala Coast	92.3	86.9	6.2%	56.3	57.6	-2.3%	27.5	27.7	-0.8%
Kauai	159.3	159.8	-0.3%	121.2	118.2	2.5%	46.6	44.4	4.8%

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Figure 3: Hawai'i Hotel Performance Year-to-Date October 2025

	Occupancy % Percentage Pt.			Average Daily Rate			RevPAR		
	2025	2024	Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	74.1%	74.0%	0.1%	\$360.09	\$359.89	0.1%	\$266.69	\$266.26	0.2%
Luxury Class	66.3%	60.6%	5.7%	\$831.89	\$807.43	3.0%	\$551.84	\$489.54	12.7%
Upper Upscale Class	76.8%	76.5%	0.3%	\$322.90	\$331.75	-2.7%	\$247.97	\$253.91	-2.3%
Upscale Class	72.6%	77.7%	-5.0%	\$235.88	\$253.88	-7.1%	\$171.34	\$197.23	-13.1%
Upper Midscale Class	71.0%	71.9%	-0.9%	\$196.64	\$221.90	-11.4%	\$139.70	\$159.60	-12.5%
Midscale & Economy Class	77.8%	78.1%	-0.3%	\$220.74	\$224.20	-1.5%	\$171.83	\$175.09	-1.9%
O'ahu	78.9%	80.7%	-1.9%	\$280.24	\$281.75	-0.5%	\$220.99	\$227.43	-2.8%
Waikiki	79.7%	81.4%	-1.7%	\$264.43	\$269.31	-1.8%	\$210.76	\$219.12	-3.8%
Other O'ahu	74.5%	77.4%	-2.9%	\$366.43	\$348.77	5.1%	\$273.17	\$269.99	1.2%
O'ahu Luxury	59.4%	59.4%	0.0%	\$729.69	\$700.86	4.1%	\$433.77	\$416.38	4.2%
O'ahu Upper Upscale	81.6%	82.5%	-0.9%	\$287.45	\$291.78	-1.5%	\$234.48	\$240.68	-2.6%
O'ahu Upscale	79.1%	85.8%	-6.8%	\$208.82	\$213.78	-2.3%	\$165.09	\$183.46	-10.0%
O'ahu Upper Midscale	78.2%	79.7%	-1.5%	\$166.02	\$177.97	-6.7%	\$129.78	\$141.87	-8.5%
O'ahu Midscale & Economy	81.4%	82.8%	-1.5%	\$150.40	\$157.83	-4.7%	\$122.41	\$130.76	-6.4%
Maui County	63.9%	62.0%	2.0%	\$526.97	\$538.30	-2.1%	\$336.96	\$333.58	1.0%
Wailea	72.8%	65.5%	7.4%	\$736.34	\$747.80	-1.5%	\$536.36	\$489.55	9.6%
Lahaina/Kā'anapali/Kapalua	62.5%	60.8%	1.8%	\$426.51	\$445.30	-4.2%	\$266.69	\$270.64	-1.5%
Other Maui County	65.5%	63.3%	2.2%	\$633.35	\$641.06	-1.2%	\$414.92	\$406.05	2.2%
Maui County Luxury	67.5%	56.2%	11.3%	\$899.40	\$912.87	-1.5%	\$606.67	\$512.89	18.3%
Maui County Upper Upscale & Upscale	63.4%	64.0%	-0.6%	\$397.79	\$431.48	-7.8%	\$252.07	\$275.97	-8.7%
Island of Hawai'i	70.1%	66.7%	3.4%	\$427.63	\$420.51	1.7%	\$299.69	\$280.55	6.8%
Kohala Coast	70.7%	72.1%	-1.3%	\$575.17	\$557.40	3.2%	\$406.89	\$401.79	1.3%
Kauai	76.6%	73.9%	2.7%	\$414.40	\$416.02	-0.4%	\$317.45	\$307.58	3.2%

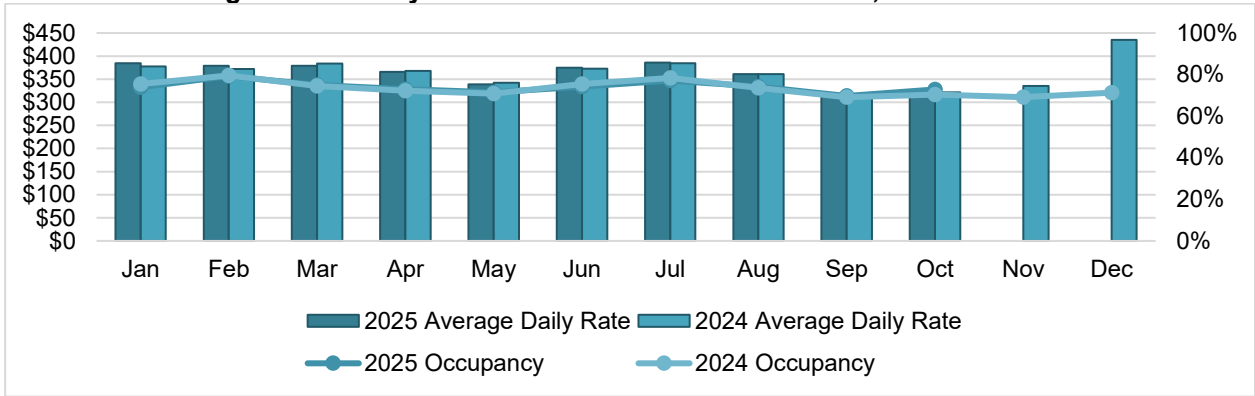
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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 4: Hawai'i Hotel Performance by Measure Year-to-Date October 2025

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	17,264.1	17,176.1	0.5%	12,786.0	12,707.6	0.6%	4,604.2	4,573.3	0.7%
O'ahu	9,537.4	9,489.5	0.5%	7,521.1	7,659.9	-1.8%	2,107.7	2,158.2	-2.3%
Waikiki	7,974.5	7,940.3	0.4%	6,356.0	6,460.6	-1.6%	1,680.8	1,739.9	-3.4%
Maui County	4,107.7	4,078.8	0.7%	2,626.6	2,527.6	3.9%	1,384.1	1,360.6	1.7%
Wailea	775.8	773.3	0.3%	565.1	506.2	11.6%	416.1	378.5	9.9%
Lahaina/Kā'anapali/ Kapalua	2,160.5	2,183.1	-1.0%	1,350.9	1,326.8	1.8%	576.2	590.8	-2.5%
Island of Hawai'i	2,054.3	2,040.1	0.7%	1,439.7	1,361.1	5.8%	615.6	572.4	7.6%
Kohala Coast	877.7	864.9	1.5%	620.9	623.5	-0.4%	357.1	347.5	2.8%
Kauai	1,564.7	1,567.6	-0.2%	1,198.6	1,159.0	3.4%	496.7	482.2	3.0%

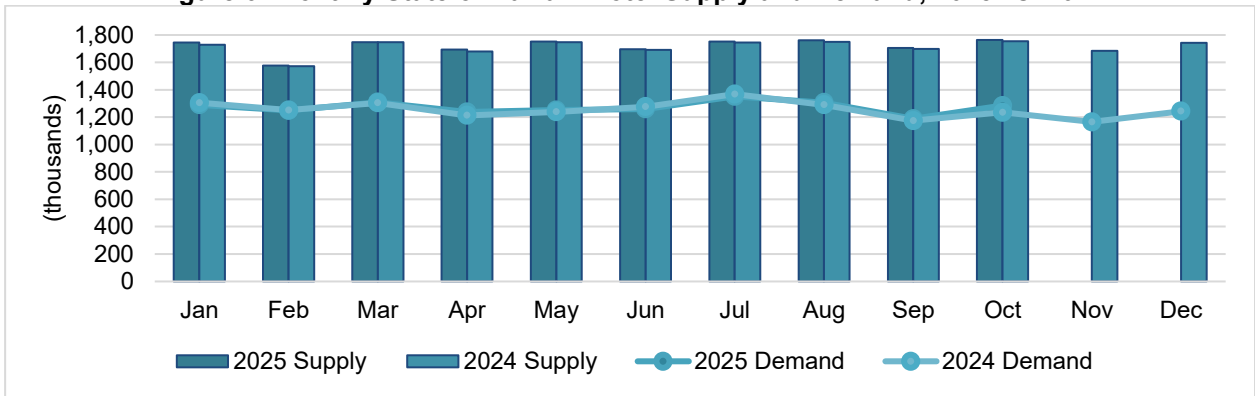
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2025 vs. 2024



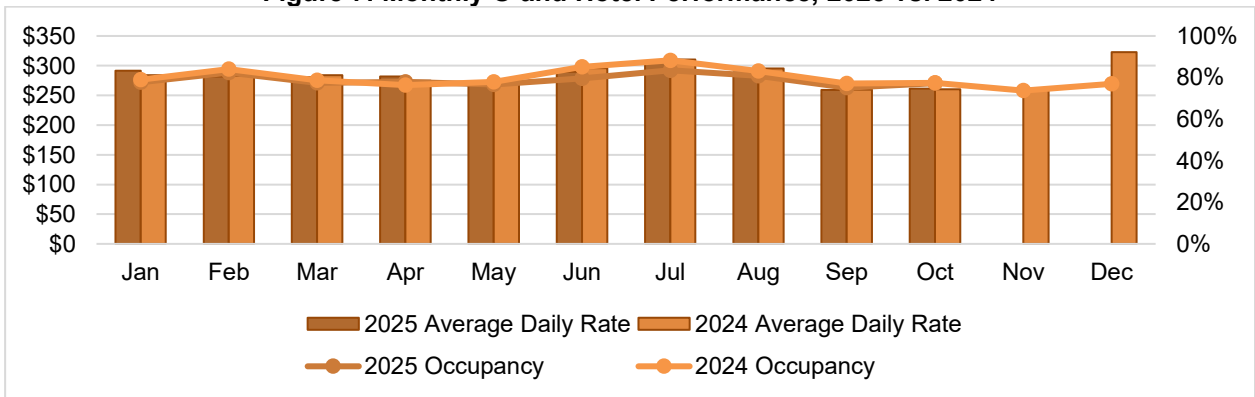
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2025 vs. 2024



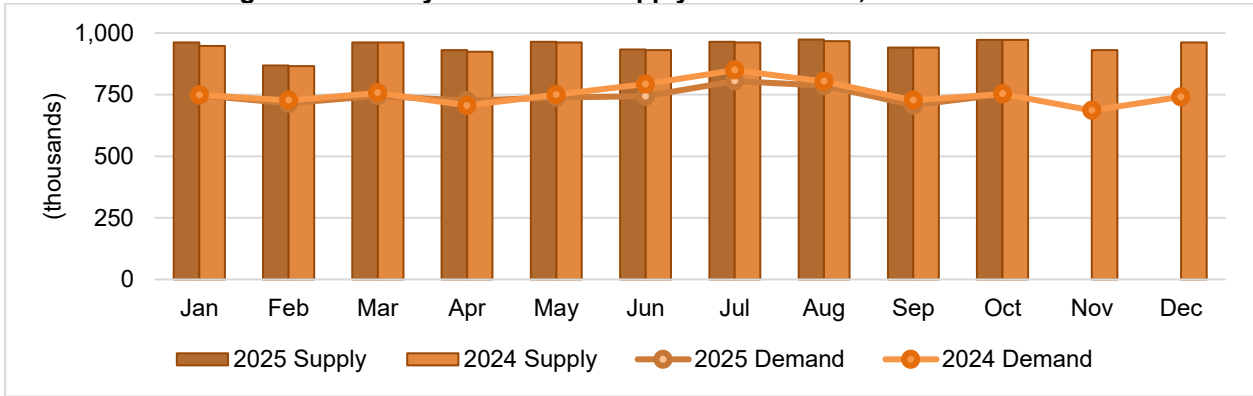
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Figure 7: Monthly O'ahu Hotel Performance, 2025 vs. 2024



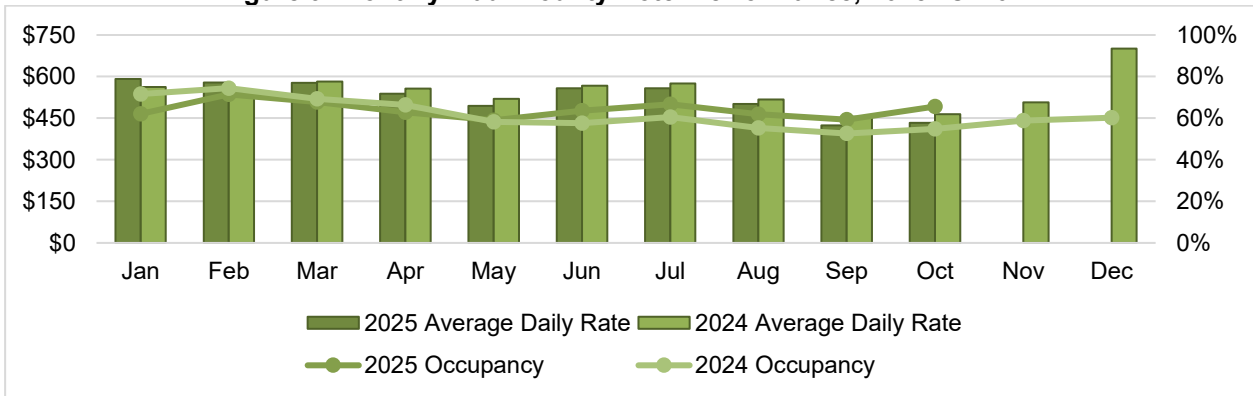
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Figure 8: Monthly O'ahu Hotel Supply and Demand, 2025 vs. 2024



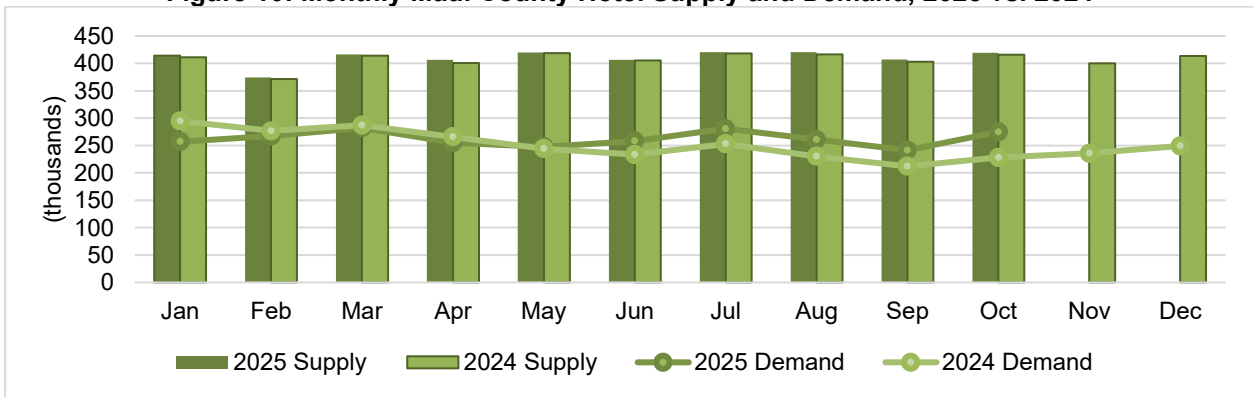
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Figure 9: Monthly Maui County Hotel Performance, 2025 vs. 2024



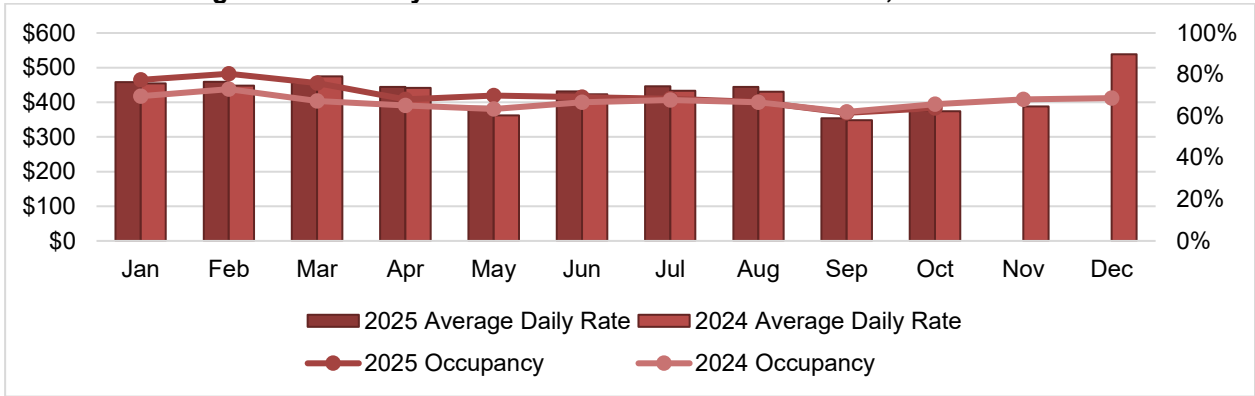
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Figure 10: Monthly Maui County Hotel Supply and Demand, 2025 vs. 2024



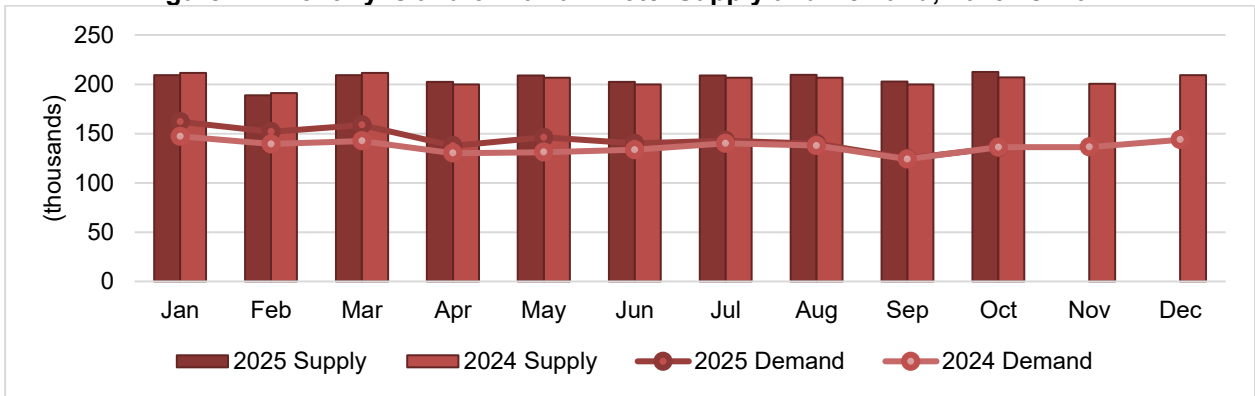
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Figure 11: Monthly Island of Hawai'i Hotel Performance, 2025 vs. 2024



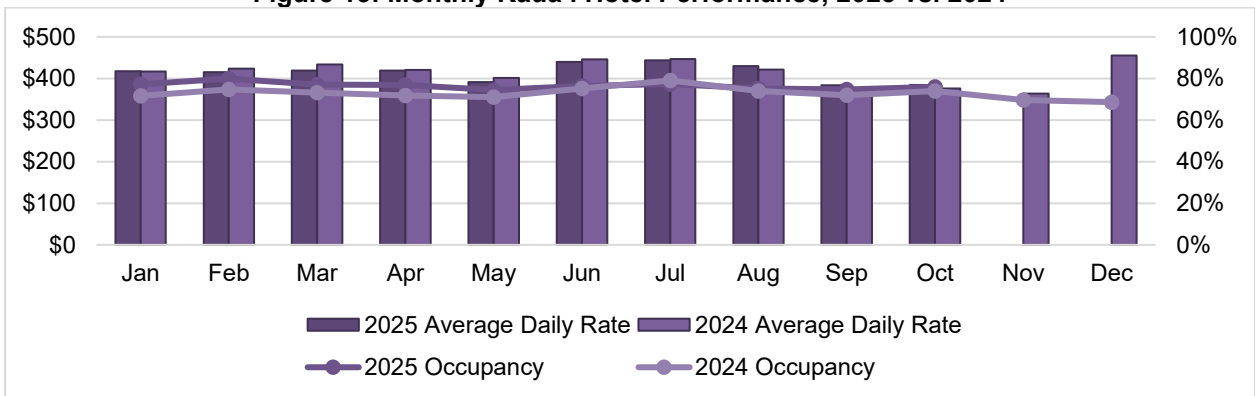
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Figure 12: Monthly Island of Hawai'i Hotel Supply and Demand, 2025 vs. 2024



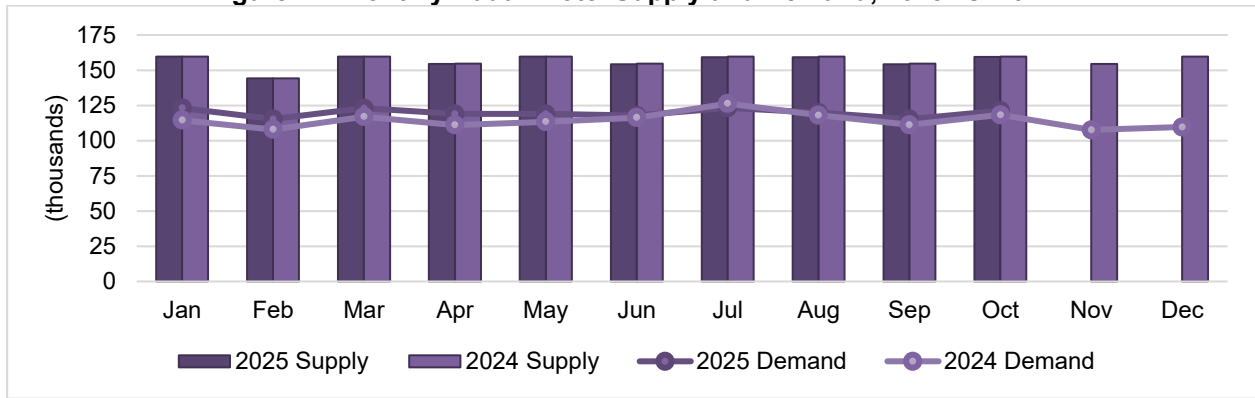
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Figure 13: Monthly Kaua'i Hotel Performance, 2025 vs. 2024



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Figure 14: Monthly Kaua'i Hotel Supply and Demand, 2025 vs. 2024



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