



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

November 2025 Hawai'i Hotel Performance Report

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

Statewide RevPAR in November 2025 was \$242 (+4.6%), with ADR at \$345 (+3.2%) and occupancy of 70.2 percent (+1.0 percentage points) compared to November 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 November 2025, the survey included 164 properties representing 48,130 rooms, or 84.7 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 \$412.7 million (+5.2%) in November 2025. Room demand was 1.20 million room nights (+1.9%) and room supply was 1.71 million room nights (+0.5%) (Figure 2).

Luxury Class properties earned RevPAR of \$520 (+9.2%), with ADR at \$811 (+5.4%) and occupancy of 64.1 percent (+2.2 percentage points). Midscale & Economy Class properties earned RevPAR of \$140 (-3.4%) with ADR at \$197 (-0.4%) and occupancy of 70.9 percent (-2.1 percentage points).

Maui County hotels continued to be impacted by the August 8, 2023, wildfires. Despite this, Maui County hotels led the counties in November 2025 RevPAR at \$313 (+4.4%), with ADR at \$472 (-7.2%) and occupancy of 66.3 percent (+7.4 percentage points). Maui's luxury resort region of Wailea had RevPAR of \$496 (+3.3%), with ADR at \$673 (-5.3%) and occupancy of 73.7 percent (+6.1 percentage points). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$245 (+8.7%), ADR at \$372 (-7.3%) and occupancy of 65.9 percent (+9.7 percentage points).

Kaua'i hotels achieved RevPAR at \$271 (+7.4%), with ADR at \$384 (+6.0%) and occupancy of 70.4 percent (+0.9 percentage points).

Hotels on the island of Hawai'i reported RevPAR at \$280 (+6.1%), with ADR at \$431 (+11.1%), and occupancy of 65.0 percent (-3.1 percentage points). Kohala Coast hotels earned RevPAR of \$378 (+2.6%), with ADR at \$604 (+16.7%), and occupancy of 62.6 percent (-8.6 percentage points).

O'ahu hotels reported RevPAR of \$198 (+3.6%) in November, ADR at \$272 (+4.7%) and occupancy of 72.9 percent (-0.8 percentage points). Waikīkī hotels earned RevPAR of \$190 (+5.1%), with ADR at \$258 (+5.1%) and occupancy of 73.4 percent (0.0 percentage points).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiiourismauthority.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 November 2025, the survey included 164 properties representing 48,130 rooms, or 84.7 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The November survey included 87 properties on O'ahu, representing 30,130 rooms (96.1%); 38 properties in the County of Maui, representing 9,347 rooms (69.1%); 21 properties on the island of Hawai'i, representing 5,314 rooms (78.7%); and 18 properties on Kaua'i, representing 3,339 rooms (64.0%).

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 November 2025

	Occupancy % Percentage			Average Daily Rate			RevPAR		
	2025	2024	Pt. Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	70.2%	69.2%	1.0%	\$344.96	\$334.40	3.2%	\$242.00	\$231.25	4.6%
Luxury Class	64.1%	61.8%	2.2%	\$811.27	\$770.03	5.4%	\$519.83	\$476.10	9.2%
Upper Upscale Class	73.2%	70.2%	3.0%	\$310.33	\$298.82	3.9%	\$227.06	\$209.65	8.3%
Upscale Class	68.7%	72.2%	-3.5%	\$209.47	\$226.36	-7.5%	\$143.99	\$163.48	-11.9%
Upper Midscale Class	65.8%	66.7%	-0.9%	\$180.49	\$192.85	-6.4%	\$118.80	\$128.61	-7.6%
Midscale & Economy Class	70.9%	73.0%	-2.1%	\$197.43	\$198.29	-0.4%	\$139.90	\$144.76	-3.4%
O'ahu	72.9%	73.7%	-0.8%	\$272.12	\$259.83	4.7%	\$198.28	\$191.48	3.6%
Waikiki	73.4%	73.5%	0.0%	\$258.24	\$245.70	5.1%	\$189.64	\$180.48	5.1%
Other O'ahu	69.9%	74.9%	-5.0%	\$346.63	\$330.69	4.8%	\$242.44	\$247.69	-2.1%
O'ahu Luxury	57.2%	59.1%	-1.9%	\$703.00	\$662.13	6.2%	\$402.19	\$391.07	2.8%
O'ahu Upper Upscale	77.8%	74.8%	3.0%	\$280.51	\$265.78	5.5%	\$218.35	\$198.85	9.8%
O'ahu Upscale	68.5%	78.1%	-9.5%	\$192.85	\$190.85	1.0%	\$132.13	\$148.97	-11.3%
O'ahu Upper Midscale	64.4%	70.6%	-6.1%	\$148.53	\$160.41	-7.4%	\$95.71	\$113.23	-15.5%
O'ahu Midscale & Economy	72.5%	75.8%	-3.4%	\$132.71	\$139.82	-5.1%	\$96.21	\$106.05	-9.3%
Maui County	66.3%	58.9%	7.4%	\$472.43	\$509.12	-7.2%	\$313.33	\$300.07	4.4%
Wailea	73.7%	67.6%	6.1%	\$672.84	\$710.25	-5.3%	\$495.87	\$480.19	3.3%
Lahaina/Kā'anapali/Kapalua	65.9%	56.2%	9.7%	\$371.84	\$401.33	-7.3%	\$244.94	\$225.42	8.7%
Other Maui County	66.8%	62.1%	4.8%	\$581.48	\$619.17	-6.1%	\$388.54	\$384.28	1.1%
Maui County Luxury	67.0%	62.4%	4.6%	\$859.58	\$860.75	-0.1%	\$576.31	\$537.24	7.3%
Maui County Upper Upscale & Upscale	66.8%	57.6%	9.2%	\$345.18	\$383.29	-9.9%	\$230.63	\$220.77	4.5%
Island of Hawai'i	65.0%	68.1%	-3.1%	\$431.04	\$387.97	11.1%	\$280.15	\$264.08	6.1%
Kohala Coast	62.6%	71.2%	-8.6%	\$604.06	\$517.84	16.7%	\$378.05	\$368.57	2.6%
Kauai	70.4%	69.5%	0.9%	\$384.19	\$362.50	6.0%	\$270.60	\$251.96	7.4%

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 November 2025

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	1,705.6	1,697.2	0.5%	1,196.5	1,173.7	1.9%	412.7	392.5	5.2%
O'ahu	940.9	940.7	0.0%	685.6	693.2	-1.1%	186.6	180.1	3.6%
Waikiki	787.0	786.8	0.0%	578.0	577.9	0.0%	149.3	142.0	5.1%
Maui County	405.6	402.4	0.8%	269.0	237.2	13.4%	127.1	120.7	5.2%
Wailea	76.6	76.3	0.5%	56.5	51.6	9.5%	38.0	36.6	3.8%
Lahaina/Kā'anapali/ Kapalua	212.4	213.3	-0.4%	139.9	119.8	16.8%	52.0	48.1	8.2%
Island of Hawai'i	202.6	197.3	2.7%	131.7	134.3	-1.9%	56.7	52.1	8.9%
Kohala Coast	89.4	84.1	6.2%	55.9	59.9	-6.6%	33.8	31.0	9.0%
Kauai	156.5	156.9	-0.3%	110.2	109.1	1.1%	42.4	39.5	7.1%

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

	Occupancy % Percentage Pt.			Average Daily Rate			RevPAR		
	2025	2024	Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	73.7%	73.5%	0.1%	\$358.69	\$357.55	0.3%	\$264.29	\$262.97	0.5%
Luxury Class	66.1%	60.7%	5.4%	\$830.12	\$804.00	3.2%	\$548.99	\$488.33	12.4%
Upper Upscale Class	76.4%	75.9%	0.5%	\$321.84	\$328.89	-2.1%	\$246.01	\$249.76	-1.5%
Upscale Class	72.3%	77.2%	-4.9%	\$233.73	\$251.66	-7.1%	\$168.94	\$194.24	-13.0%
Upper Midscale Class	70.6%	71.4%	-0.8%	\$199.49	\$223.02	-10.6%	\$140.85	\$159.27	-11.6%
Midscale & Economy Class	77.2%	77.9%	-0.7%	\$212.07	\$215.97	-1.8%	\$163.78	\$168.32	-2.7%
O'ahu	78.3%	80.1%	-1.8%	\$279.56	\$279.93	-0.1%	\$218.87	\$224.19	-2.4%
Waikiki	79.1%	80.7%	-1.5%	\$263.84	\$267.37	-1.3%	\$208.77	\$215.64	-3.2%
Other O'ahu	74.0%	77.2%	-3.1%	\$365.27	\$347.18	5.2%	\$270.47	\$267.98	0.9%
O'ahu Luxury	59.2%	59.4%	-0.1%	\$727.48	\$697.38	4.3%	\$431.00	\$414.09	4.1%
O'ahu Upper Upscale	81.2%	81.8%	-0.6%	\$286.85	\$289.63	-1.0%	\$233.03	\$236.90	-1.6%
O'ahu Upscale	78.1%	85.1%	-7.0%	\$207.55	\$211.91	-2.1%	\$162.13	\$180.38	-10.1%
O'ahu Upper Midscale	76.9%	78.9%	-2.0%	\$164.71	\$176.56	-6.7%	\$126.72	\$139.29	-9.0%
O'ahu Midscale & Economy	80.4%	82.2%	-1.8%	\$148.55	\$156.33	-5.0%	\$119.39	\$128.52	-7.1%
Maui County	64.2%	61.7%	2.5%	\$521.90	\$535.80	-2.6%	\$334.84	\$330.57	1.3%
Wailea	72.9%	65.7%	7.3%	\$730.57	\$744.33	-1.8%	\$532.72	\$488.71	9.0%
Lahaina/Kā'anapali/Kapalua	62.8%	60.4%	2.5%	\$421.38	\$441.66	-4.6%	\$264.75	\$266.62	-0.7%
Other Maui County	65.6%	63.2%	2.4%	\$628.58	\$639.12	-1.6%	\$412.54	\$404.08	2.1%
Maui County Luxury	67.4%	56.7%	10.7%	\$895.84	\$907.72	-1.3%	\$603.94	\$515.08	17.3%
Maui County Upper Upscale & Upscale	63.7%	63.4%	0.3%	\$392.85	\$427.53	-8.1%	\$250.15	\$270.99	-7.7%
Island of Hawai'i	69.6%	66.8%	2.8%	\$428.84	\$417.65	2.7%	\$298.28	\$278.97	6.9%
Kohala Coast	69.9%	72.0%	-2.1%	\$579.40	\$553.93	4.6%	\$405.14	\$398.84	1.6%
Kauai	75.9%	73.4%	2.5%	\$410.03	\$409.75	0.1%	\$311.22	\$300.85	3.4%

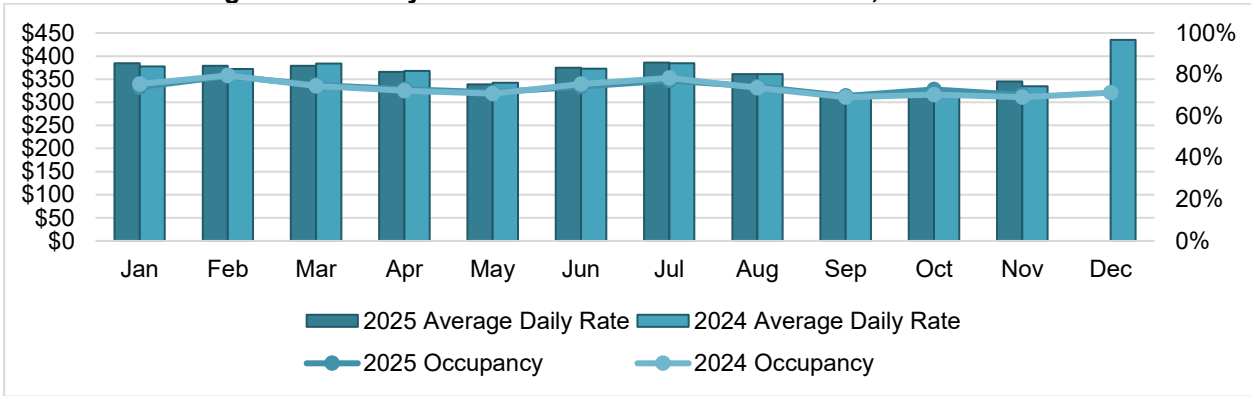
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Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

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

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	18,962.6	18,866.3	0.5%	13,972.2	13,875.4	0.7%	5,011.7	4,961.2	1.0%
O'ahu	10,478.3	10,430.2	0.5%	8,203.9	8,353.1	-1.8%	2,293.4	2,338.3	-1.9%
Waikiki	8,761.6	8,727.1	0.4%	6,932.7	7,038.5	-1.5%	1,829.1	1,881.9	-2.8%
Maui County	4,513.3	4,481.2	0.7%	2,895.6	2,764.8	4.7%	1,511.2	1,481.3	2.0%
Wailea	852.4	849.5	0.3%	621.6	557.8	11.4%	454.1	415.2	9.4%
Lahaina/Kā'anapali/ Kapalua	2,372.9	2,396.4	-1.0%	1,490.8	1,446.7	3.1%	628.2	638.9	-1.7%
Island of Hawai'i	2,226.4	2,206.9	0.9%	1,548.6	1,474.1	5.1%	664.1	615.7	7.9%
Kohala Coast	967.1	949.0	1.9%	676.2	683.3	-1.0%	391.8	378.5	3.5%
Kauai	1,744.6	1,748.0	-0.2%	1,324.2	1,283.4	3.2%	542.9	525.9	3.2%

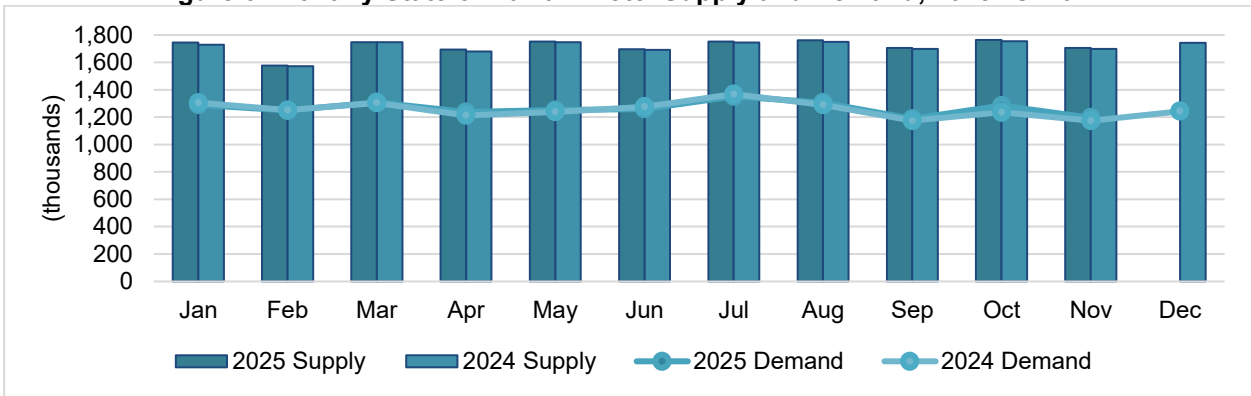
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Figure 5: Monthly State of Hawai'i Hotel Performance, 2025 vs. 2024



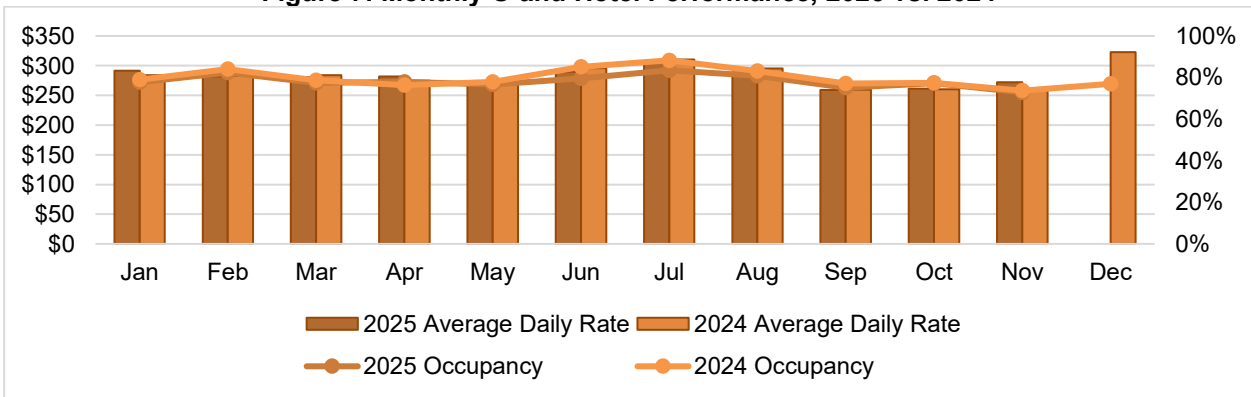
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Figure 6: Monthly State of Hawai'i Hotel Supply and Demand, 2025 vs. 2024



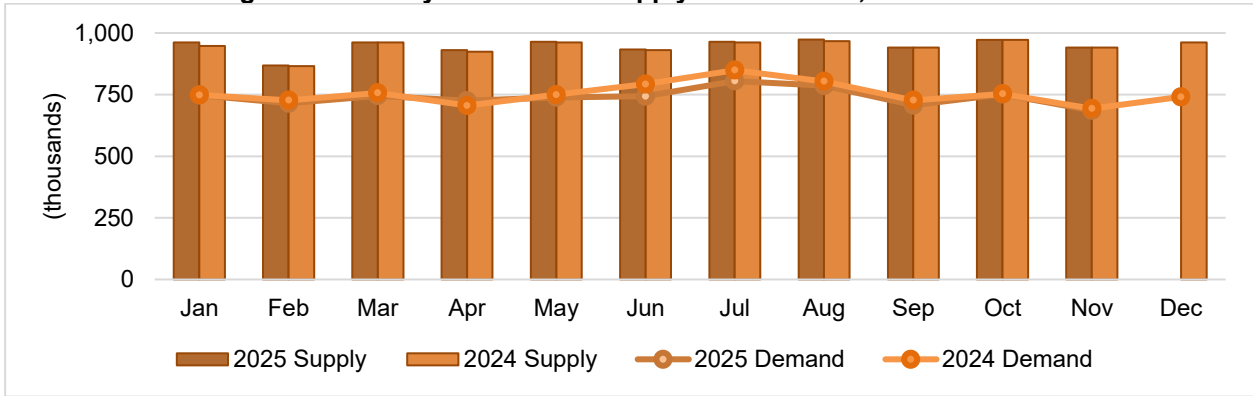
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Figure 7: Monthly O'ahu Hotel Performance, 2025 vs. 2024



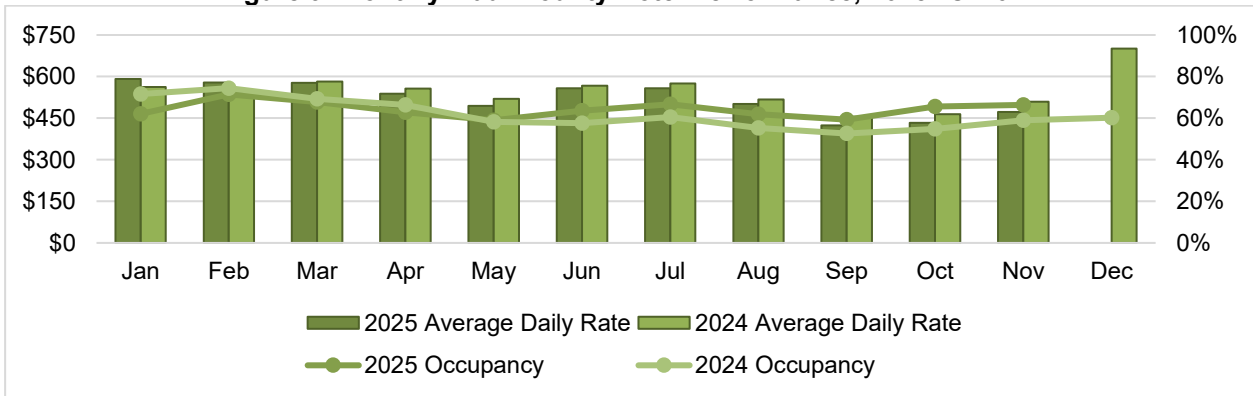
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Figure 8: Monthly O'ahu Hotel Supply and Demand, 2025 vs. 2024



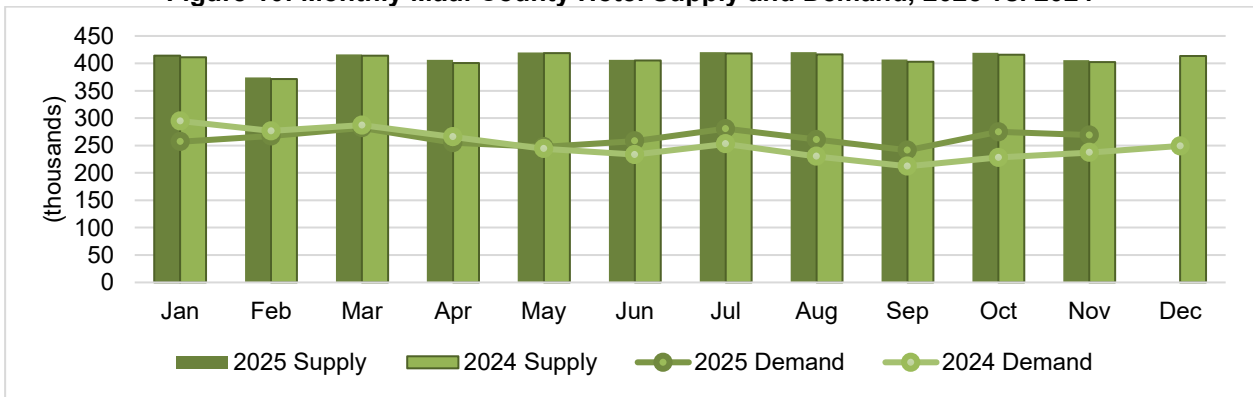
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Figure 9: Monthly Maui County Hotel Performance, 2025 vs. 2024



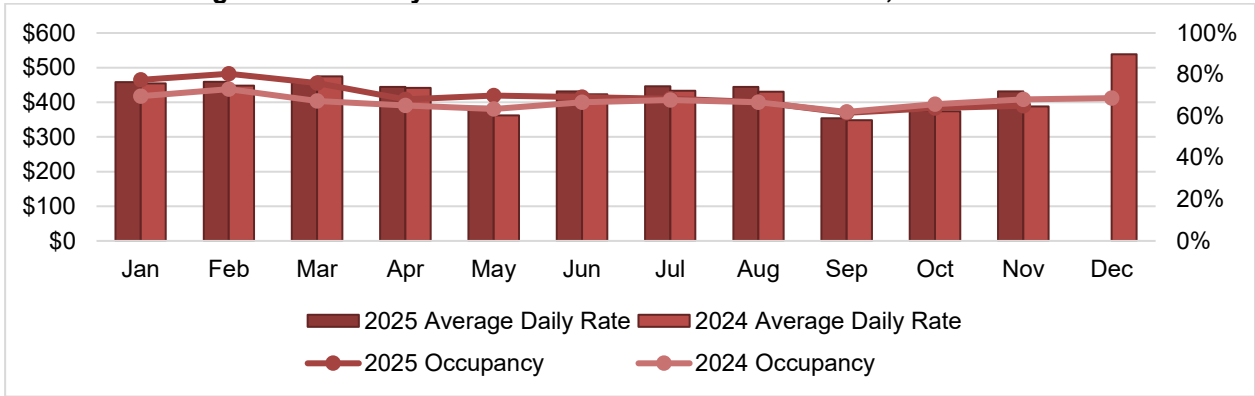
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Figure 10: Monthly Maui County Hotel Supply and Demand, 2025 vs. 2024



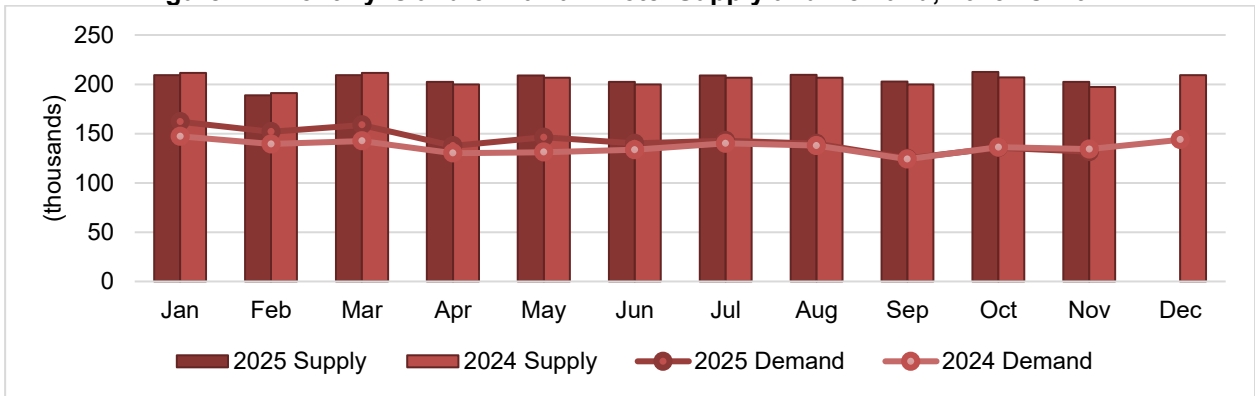
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Figure 11: Monthly Island of Hawai'i Hotel Performance, 2025 vs. 2024



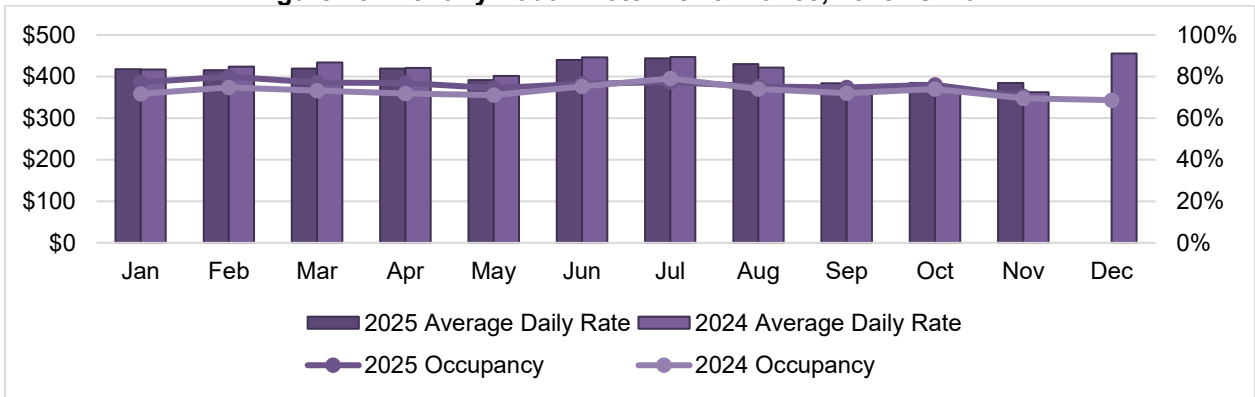
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Figure 12: Monthly Island of Hawai'i Hotel Supply and Demand, 2025 vs. 2024



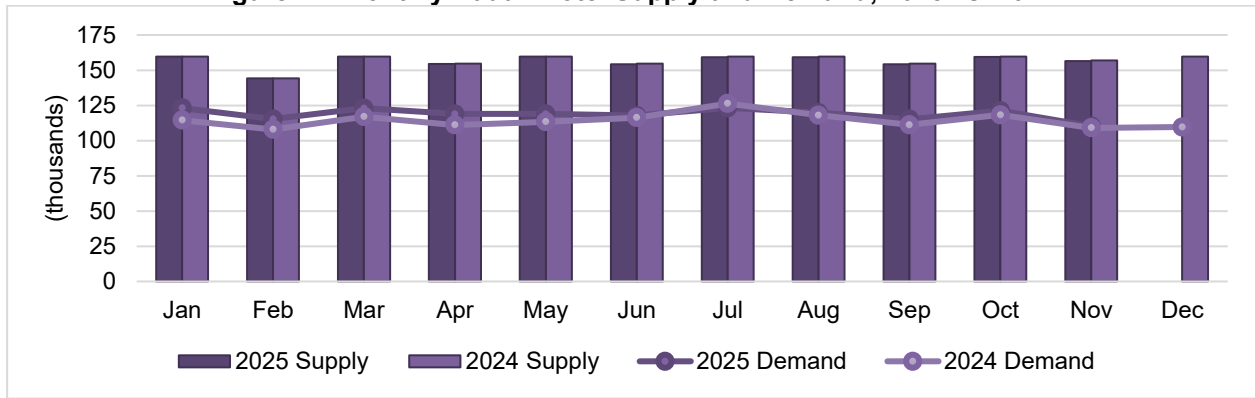
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Figure 13: Monthly Kaua'i Hotel Performance, 2025 vs. 2024



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



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