



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

June 2025 Hawai'i Hotel Performance Report

Hawai'i hotels statewide reported slightly higher average daily rate (ADR) but lower occupancy and revenue per available room (RevPAR) in June 2025 compared to June 2024. When compared to pre-pandemic June 2019, statewide ADR and RevPAR were higher in June 2025 but occupancy was lower.

Statewide RevPAR in June 2025 was \$278 (-1.1%), with ADR at \$375 (+0.5%) and occupancy of 74.3 percent (-1.2 percentage points) compared to June 2024 (Figure 1). Compared with June 2019, RevPAR was 18.1 percent higher, driven by higher ADR (+33.5%) which offset lower occupancy (-9.7 percentage points) (Figure 3).

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 June 2025, the survey included 167 properties representing 48,082 rooms, or 85.1 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 \$471.5 million (-0.8% vs. 2024, +23.4% vs. 2019) in June 2025. Room demand was 1.26 million room nights (-1.3% vs. 2024, -7.6% vs. 2019) and room supply was 1.70 million room nights (+0.3% vs. 2024, +4.5% vs. 2019) (Figure 2).

Luxury Class properties earned RevPAR of \$584 (+12.7% vs. 2024, +31.7% vs. 2019), with ADR at \$854 (+0.5% vs. 2024, +54.2% vs. 2019) and occupancy of 68.4 percent (+7.4 percentage points vs. 2024, -11.6 percentage points vs. 2019). Midscale & Economy Class properties earned RevPAR of \$175 (-6.1% vs. 2024, +26.6% vs. 2019) with ADR at \$234 (-1.5% vs. 2024, +38.4% vs. 2019) and occupancy of 74.9 percent (-3.7 percentage points vs. 2024, -7.0 percentage points vs. 2019).

Maui County hotels continued to be impacted by the August 8, 2023, wildfires, but still led the counties in June 2025 RevPAR due to comparatively higher ADR. Maui County hotels achieved RevPAR of \$355 (+8.5% vs. 2024, +11.6% vs. 2019), with ADR at \$558 (-1.7% vs. 2024, +41.6% vs. 2019) and occupancy of 63.5 percent (+6.0 percentage points vs. 2024, -17.1 percentage points vs. 2019). Maui's luxury resort region of Wailea had RevPAR of \$560 (+11.5% vs. 2024, -0.3% vs. 2019), with ADR at \$753 (-7.9% vs. 2024, +22.1% vs. 2019) and occupancy of 74.4 percent (+13.0 percentage points vs. 2024, -16.7 percentage points vs. 2019). The Lahaina/Kā'anapali/Kapalua region had RevPAR of \$292 (+13.1% vs. 2024, +8.1% vs. 2019), ADR at \$466 (+1.3% vs. 2024, +40.3% vs. 2019) and occupancy of 62.6 percent (+6.5 percentage points vs. 2024, -18.7 percentage points vs. 2019).

Kaua'i hotels earned RevPAR of \$336 (+0.1% vs. 2024, +61.3% vs. 2019), with ADR at \$440 (-1.4% vs. 2024, +56.8% vs. 2019) and occupancy of 76.4 percent (+1.2 percentage points vs. 2024, +2.1 percentage points vs. 2019).

Hotels on the island of Hawai'i reported RevPAR at \$299 (+5.8% vs. 2024, +53.0% vs. 2019), with ADR at \$432 (+2.0% vs. 2024, +73.4% vs. 2019), and occupancy of 69.2 percent (+2.4

percentage points vs. 2024, -9.2 percentage points vs. 2019). Kohala Coast hotels earned RevPAR of \$422 (+2.5% vs. 2024, +50.5% vs. 2019), with ADR at \$585 (+6.2% vs. 2024, +66.6% vs. 2019), and occupancy of 72.1 percent (-2.6 percentage points vs. 2024, -7.7 percentage points vs. 2019).

O'ahu hotels reported RevPAR of \$231 (-8.4% vs. 2024, +8.0% vs. 2019) in June, ADR at \$290 (-2.1% vs. 2024, +19.3% vs. 2019) and occupancy of 79.7 percent (-5.5 percentage points vs. 2024, -8.3 percentage points vs. 2019). Waikīkī hotels earned RevPAR of \$219 (-9.4% vs. 2024, +4.4% vs. 2019), with ADR at \$271 (-3.5% vs. 2024, +14.1% vs. 2019) and occupancy of 80.7 percent (-5.2 percentage points vs. 2024, -7.5 percentage points vs. 2019).

First Half 2025

In the first half of 2025, Hawai'i's hotels earned \$276 in RevPAR (-0.1% vs. 2024, +22.3% vs. 2019), with ADR at \$370 (+0.2% vs. 2024, +32.3% vs. 2019) and occupancy of 74.4 percent (-0.3 percentage points vs. 2024, -6.1 percentage points vs. 2019).

Total statewide hotel revenues for the first half of 2025 were \$2.8 billion (+0.3% vs. 2024, +27.6% vs. 2019). Room supply was 10.2 million room nights (+0.4% vs. 2024, +4.3% vs. 2019), and room demand was 7.6 million room nights (+0.1% vs. 2024, -3.5% vs. 2019).

Comparison to Top U.S. Markets

In comparison to the top U.S. markets, the Hawaiian Islands earned the highest first half 2025 RevPAR at \$276 (-0.1%). New York, New York was second at \$236 (+4.8%), followed by Miami, Florida at \$197 (+3.1%) (Figure 19).

The Hawaiian Islands also led the U.S. markets in first half 2025 ADR at \$370 (+0.2%), followed by New York, New York at \$291 (+4.4%) and Miami, Florida at \$251 (+2.5%) (Figure 20).

New York, New York topped the country in occupancy at 81.2 percent (+0.3 percentage points), followed by Miami, Florida at 78.4 percent (+0.5 percentage points) and Tampa Bay, Florida at 76.4% (+2.3 percentage points). The Hawaiian Islands ranked fifth at 74.4 percent (-0.3 percentage points) (Figure 21).

Comparison to International Markets

Hotels in French Polynesia ranked highest for first half 2025 RevPAR for international "sun and sea" destinations at \$464 (-0.5%), followed by the Maldives (\$451, +9.0%). Maui County (\$359, -2.4%), Hawai'i Island (\$323, +10.1%), Kaua'i (\$321, +3.2%), and O'ahu (\$221, -2.2%) ranked third, fifth, sixth, and ninth, respectively (Figure 22).

Hotels in French Polynesia led in first half 2025 ADR at \$727 (+3.5%), followed by the Maldives (\$665, +4.2%) and Maui County (\$558, +0.2%). Hawai'i Island (\$440, +1.2%), Kaua'i (\$417, -1.5%), and O'ahu (\$282, -0.2%) ranked sixth, seventh, and tenth, respectively (Figure 23).

O'ahu led in occupancy for "sun and sea" destinations at 78.5 percent (-1.6 percentage points), followed by Kaua'i (76.9%, +3.5 percentage points) and Puerto Rico (75.3%, -1.4 percentage points). Hawai'i Island (73.4%, +6.0 percentage points) and Maui County (64.4%, -1.7 percentage points) ranked sixth and thirteenth, respectively (Figure 24).

Tables of hotel performance statistics, including data presented in the report are available for viewing online at: <https://www.hawaiitourismauthority.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 June 2025, the survey included 167 properties representing 48,082 rooms, or 85.1 percent of all lodging properties with 20 rooms or more in the Hawaiian Islands, including full service, limited service, and condominium hotels. The June survey included 85 properties on O'ahu, representing 29,864 rooms (96.0%); 39 properties in the County of Maui, representing 9,410 rooms (69.5%); 22 properties on the island of Hawai'i, representing 5,199 rooms (77.1%); and 21 properties on Kaua'i, representing 3,609 rooms (70.2%).

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 June 2025

	Occupancy %			Average Daily Rate			RevPAR		
	2025	2024	Percentage Pt. Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	74.3%	75.5%	-1.2%	\$374.54	\$372.54	0.5%	\$278.12	\$281.15	-1.1%
Luxury Class	68.4%	61.0%	7.4%	\$853.89	\$849.51	0.5%	\$583.72	\$518.13	12.7%
Upper Upscale Class	78.9%	79.6%	-0.7%	\$332.67	\$340.59	-2.3%	\$262.54	\$271.18	-3.2%
Upscale Class	68.3%	77.3%	-9.0%	\$239.42	\$257.06	-6.9%	\$163.46	\$198.63	-17.7%
Upper Midscale Class	69.1%	71.2%	-2.0%	\$197.24	\$224.19	-12.0%	\$136.37	\$159.53	-14.5%
Midscale & Economy Class	74.9%	78.6%	-3.7%	\$233.77	\$237.41	-1.5%	\$175.16	\$186.60	-6.1%
O'ahu	79.7%	85.2%	-5.5%	\$289.67	\$295.77	-2.1%	\$230.75	\$251.94	-8.4%
Waikiki	80.7%	85.9%	-5.2%	\$270.84	\$280.72	-3.5%	\$218.56	\$241.26	-9.4%
Other O'ahu	74.2%	81.1%	-7.0%	\$398.69	\$380.15	4.9%	\$295.63	\$308.46	-4.2%
O'ahu Luxury	59.5%	62.1%	-2.6%	\$739.81	\$710.11	4.2%	\$439.83	\$440.99	-0.3%
O'ahu Upper Upscale	83.9%	88.6%	-4.7%	\$295.57	\$304.81	-3.0%	\$247.86	\$270.00	-8.2%
O'ahu Upscale	78.7%	87.9%	-9.3%	\$217.67	\$226.26	-3.8%	\$171.22	\$198.92	-13.9%
O'ahu Upper Midscale	78.1%	82.9%	-4.9%	\$168.49	\$190.78	-11.7%	\$131.55	\$158.24	-16.9%
O'ahu Midscale & Economy	78.1%	85.1%	-7.1%	\$154.19	\$167.08	-7.7%	\$120.35	\$142.26	-15.4%
Maui County	63.5%	57.6%	6.0%	\$558.02	\$567.55	-1.7%	\$354.55	\$326.68	8.5%
Wailea	74.4%	61.4%	13.0%	\$753.11	\$817.96	-7.9%	\$560.16	\$502.25	11.5%
Lahaina/Kā'anapali/Kapalua	62.6%	56.0%	6.5%	\$466.41	\$460.54	1.3%	\$291.90	\$258.13	13.1%
Other Maui County	64.6%	59.3%	5.3%	\$655.58	\$683.24	-4.0%	\$423.41	\$405.08	4.5%
Maui County Luxury	71.9%	52.6%	19.3%	\$921.80	\$1,012.90	-9.0%	\$662.92	\$532.75	24.4%
Maui County Upper Upscale & Upscale	62.1%	59.8%	2.3%	\$418.72	\$437.96	-4.4%	\$260.03	\$261.86	-0.7%
Island of Hawai'i	69.2%	66.8%	2.4%	\$431.82	\$423.27	2.0%	\$298.83	\$282.55	5.8%
Kohala Coast	72.1%	74.7%	-2.6%	\$584.55	\$550.40	6.2%	\$421.57	\$411.19	2.5%
Kaua'i	76.4%	75.2%	1.2%	\$439.78	\$446.13	-1.4%	\$336.12	\$335.67	0.1%

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 June 2025

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	1,695.5	1,690.4	0.3%	1,259.0	1,275.7	-1.3%	471.5	475.3	-0.8%
O'ahu	932.8	930.4	0.3%	743.1	792.6	-6.2%	215.2	234.4	-8.2%
Waikiki	785.2	782.6	0.3%	633.6	672.6	-5.8%	171.6	188.8	-9.1%
Maui County	406.2	405.5	0.2%	258.1	233.4	10.6%	144.0	132.5	8.7%
Wailea	76.5	76.3	0.2%	56.9	46.9	21.4%	42.9	38.3	11.8%
Lahaina/Kā'anapali/ Kapalua	212.7	216.3	-1.7%	133.1	121.2	9.8%	62.1	55.8	11.2%
Island of Hawai'i	202.3	200.0	1.2%	140.0	133.5	4.9%	60.5	56.5	7.0%
Kohala Coast	86.3	84.0	2.7%	62.2	62.7	-0.8%	36.4	34.5	5.3%
Kaua'i	154.1	154.6	-0.3%	117.8	116.3	1.3%	51.8	51.9	-0.2%

Source: STR, Inc. © Copyright 2025 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 3: Hawai'i Hotel Performance June 2025 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2025	2019	Percentage Change	2025	2019	% Change	2025	2019	% Change
State of Hawai'i	74.3%	83.9%	-9.7%	\$374.54	\$280.51	33.5%	\$278.12	\$235.44	18.1%
Luxury Class	68.4%	80.0%	-11.6%	\$853.89	\$553.86	54.2%	\$583.72	\$443.10	31.7%
Upper Upscale Class	78.9%	86.6%	-7.7%	\$332.67	\$281.87	18.0%	\$262.54	\$244.19	7.5%
Upscale Class	68.3%	81.2%	-13.0%	\$239.42	\$206.74	15.8%	\$163.46	\$167.94	-2.7%
Upper Midscale Class	69.1%	86.5%	-17.4%	\$197.24	\$166.74	18.3%	\$136.37	\$144.23	-5.4%
Midscale & Economy Class	74.9%	81.9%	-7.0%	\$233.77	\$168.95	38.4%	\$175.16	\$138.34	26.6%
O'ahu	79.7%	87.9%	-8.3%	\$289.67	\$242.90	19.3%	\$230.75	\$213.63	8.0%
Waikiki	80.7%	88.2%	-7.5%	\$270.84	\$237.35	14.1%	\$218.56	\$209.37	4.4%
Other O'ahu	74.2%	86.4%	-12.2%	\$398.69	\$277.10	43.9%	\$295.63	\$239.33	23.5%
O'ahu Luxury	59.5%	79.6%	-20.2%	\$739.81	\$478.26	54.7%	\$439.83	\$380.74	15.5%
O'ahu Upper Upscale	83.9%	89.3%	-5.5%	\$295.57	\$268.33	10.1%	\$247.86	\$239.72	3.4%
O'ahu Upscale	78.7%	89.3%	-10.7%	\$217.67	\$198.72	9.5%	\$171.22	\$177.48	-3.5%
O'ahu Upper Midscale	78.1%	87.2%	-9.1%	\$168.49	\$162.77	3.5%	\$131.55	\$141.95	-7.3%
O'ahu Midscale & Economy	78.1%	88.8%	-10.8%	\$154.19	\$142.58	8.1%	\$120.35	\$126.64	-5.0%
Maui County	63.5%	80.6%	-17.1%	\$558.02	\$393.97	41.6%	\$354.55	\$317.57	11.6%
Wailea	74.4%	91.1%	-16.7%	\$753.11	\$616.71	22.1%	\$560.16	\$561.61	-0.3%
Lahaina/Kā'anapali/Kapalua	62.6%	81.2%	-18.7%	\$466.41	\$332.40	40.3%	\$291.90	\$270.05	8.1%
Other Maui County	64.6%	79.8%	-15.2%	\$655.58	\$473.97	38.3%	\$423.41	\$378.22	11.9%
Maui County Luxury	71.9%	85.1%	-13.2%	\$921.80	\$549.93	67.6%	\$662.92	\$468.15	41.6%
Maui County Upper Upscale & Upscale	62.1%	81.0%	-18.9%	\$418.72	\$311.71	34.3%	\$260.03	\$252.50	3.0%
Island of Hawai'i	69.2%	78.4%	-9.2%	\$431.82	\$249.05	73.4%	\$298.83	\$195.25	53.0%
Kohala Coast	72.1%	79.8%	-7.7%	\$584.55	\$350.89	66.6%	\$421.57	\$280.11	50.5%
Kaua'i	76.4%	74.3%	2.1%	\$439.78	\$280.48	56.8%	\$336.12	\$208.42	61.3%

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 4: Hawai'i Hotel Performance by Measure June 2025 vs. 2019

	Supply (room nights, thousands)			Demand (room nights, thousands)			Revenue (\$millions)		
	2025	2019	% Change	2025	2019	% Change	2025	2019	% Change
State of Hawai'i	1,695.5	1,622.8	4.5%	1,259.0	1,362.1	-7.6%	471.5	382.1	23.4%
O'ahu	932.8	910.4	2.5%	743.1	800.7	-7.2%	215.2	194.5	10.7%
Waikiki	785.2	781.0	0.5%	633.6	688.9	-8.0%	171.6	163.5	5.0%
Maui County	406.2	381.8	6.4%	258.1	307.7	-16.1%	144.0	121.2	18.8%
Wailea	76.5	65.8	16.2%	56.9	59.9	-5.1%	42.9	37.0	15.9%
Lahaina/Kā'anapali/ Kapalua	212.7	214.1	-0.6%	133.1	173.9	-23.5%	62.1	57.8	7.4%
Island of Hawai'i	202.3	194.2	4.2%	140.0	152.2	-8.0%	60.5	37.9	59.5%
Kohala Coast	86.3	90.0	-4.2%	62.2	71.4	-12.8%	36.4	25.1	45.0%
Kaua'i	154.1	136.4	13.0%	117.8	101.4	16.2%	51.8	28.4	82.2%

Source: STR, Inc. © Copyright 2025 State of Hawai'i Department of Business, Economic Development & Tourism

Figure 5: Hawai'i Hotel Performance Year-to-Date June 2025

	Occupancy % Percentage Pt.			Average Daily Rate			RevPAR		
	2025	2024	Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	74.4%	74.7%	-0.3%	\$370.32	\$369.60	0.2%	\$275.54	\$275.94	-0.1%
Luxury Class	67.7%	61.6%	6.2%	\$852.50	\$823.10	3.6%	\$577.34	\$506.78	13.9%
Upper Upscale Class	76.8%	77.0%	-0.2%	\$327.59	\$339.79	-3.6%	\$251.49	\$261.50	-3.8%
Upscale Class	73.0%	78.7%	-5.7%	\$244.88	\$260.21	-5.9%	\$178.81	\$204.84	-12.7%
Upper Midscale Class	71.7%	72.8%	-1.1%	\$201.45	\$232.22	-13.2%	\$144.44	\$169.01	-14.5%
Midscale & Economy Class	78.3%	79.0%	-0.7%	\$231.10	\$231.27	-0.1%	\$180.87	\$182.70	-1.0%
O'ahu	78.5%	80.1%	-1.6%	\$281.84	\$282.34	-0.2%	\$221.37	\$226.25	-2.2%
Waikiki	79.1%	80.7%	-1.6%	\$264.96	\$268.94	-1.5%	\$209.56	\$216.97	-3.4%
Other O'ahu	75.6%	77.3%	-1.6%	\$375.74	\$356.39	5.4%	\$284.17	\$275.37	3.2%
O'ahu Luxury	60.6%	58.8%	1.7%	\$724.94	\$702.99	3.1%	\$438.95	\$413.39	6.2%
O'ahu Upper Upscale	80.5%	81.2%	-0.7%	\$287.26	\$292.74	-1.9%	\$231.24	\$237.85	-2.8%
O'ahu Upscale	80.3%	86.4%	-6.1%	\$210.14	\$212.69	-1.2%	\$168.76	\$183.74	-8.2%
O'ahu Upper Midscale	78.0%	79.6%	-1.6%	\$168.53	\$177.66	-5.1%	\$131.48	\$141.39	-7.0%
O'ahu Midscale & Economy	81.5%	83.6%	-2.0%	\$151.80	\$156.12	-2.8%	\$123.79	\$130.45	-5.1%
Maui County	64.4%	66.1%	-1.7%	\$558.15	\$556.97	0.2%	\$359.31	\$368.28	-2.4%
Wailea	74.7%	67.8%	6.9%	\$774.56	\$771.64	0.4%	\$578.28	\$523.19	10.5%
Lahaina/Kā'anapali/Kapalua	62.0%	66.2%	-4.1%	\$451.77	\$463.51	-2.5%	\$280.22	\$306.73	-8.6%
Other Maui County	67.0%	66.1%	0.9%	\$667.63	\$665.91	0.3%	\$447.20	\$439.88	1.7%
Maui County Luxury	68.7%	58.0%	10.8%	\$940.22	\$937.11	0.3%	\$646.33	\$543.29	19.0%
Maui County Upper Upscale & Upscale	63.4%	68.8%	-5.4%	\$421.35	\$453.40	-7.1%	\$267.28	\$312.02	-14.3%
Island of Hawai'i	73.4%	67.5%	6.0%	\$440.24	\$435.19	1.2%	\$323.29	\$293.63	10.1%
Kohala Coast	75.5%	74.4%	1.1%	\$591.93	\$581.18	1.8%	\$446.87	\$432.48	3.3%
Kaua'i	76.9%	73.4%	3.5%	\$416.87	\$423.34	-1.5%	\$320.77	\$310.80	3.2%

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 6: Hawai'i Hotel Performance by Measure Year-to-Date June 2025

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2025	2024	% Change	2025	2024	% Change	2025	2024	% Change
State of Hawai'i	10,219.6	10,177.7	0.4%	7,604.0	7,598.7	0.1%	2,815.9	2,808.5	0.3%
O'ahu	5,627.3	5,598.2	0.5%	4,420.0	4,486.2	-1.5%	1,245.7	1,266.6	-1.7%
Waikiki	4,736.9	4,708.3	0.6%	3,746.5	3,798.6	-1.4%	992.7	1,021.6	-2.8%
Maui County	2,439.8	2,426.7	0.5%	1,570.7	1,604.6	-2.1%	876.7	893.7	-1.9%
Wailea	461.7	460.4	0.3%	344.7	312.2	10.4%	267.0	240.9	10.8%
Lahaina/Kā'anapali/ Kapalua	1,284.3	1,305.0	-1.6%	796.6	863.6	-7.8%	359.9	400.3	-10.1%
Island of Hawai'i	1,220.7	1,220.1	0.0%	896.4	823.2	8.9%	394.6	358.3	10.2%
Kohala Coast	520.4	520.6	0.0%	392.9	387.4	1.4%	232.5	225.1	3.3%
Kaua'i	931.8	932.7	-0.1%	717.0	684.7	4.7%	298.9	289.9	3.1%

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Figure 7: Hawai'i Hotel Performance Year-to-Date June 2025 vs. 2019

	Occupancy %			Average Daily Rate			RevPAR		
	2025	2019	Percentage Pt. Change	2025	2019	% Change	2025	2019	% Change
State of Hawai'i	74.4%	80.5%	-6.1%	\$370.32	\$279.99	32.3%	\$275.54	\$225.27	22.3%
Luxury Class	67.7%	76.3%	-8.5%	\$852.50	\$562.14	51.7%	\$577.34	\$428.71	34.7%
Upper Upscale Class	76.8%	82.2%	-5.5%	\$327.59	\$277.99	17.8%	\$251.49	\$228.63	10.0%
Upscale Class	73.0%	77.8%	-4.8%	\$244.88	\$210.14	16.5%	\$178.81	\$163.51	9.4%
Upper Midscale Class	71.7%	83.5%	-11.8%	\$201.45	\$161.33	24.9%	\$144.44	\$134.74	7.2%
Midscale & Economy Class	78.3%	82.4%	-4.1%	\$231.10	\$175.43	31.7%	\$180.87	\$144.53	25.1%
O'ahu	78.5%	83.3%	-4.7%	\$281.84	\$233.18	20.9%	\$221.37	\$194.19	14.0%
Waikiki	79.1%	83.5%	-4.4%	\$264.96	\$228.28	16.1%	\$209.56	\$190.68	9.9%
Other O'ahu	75.6%	81.8%	-6.1%	\$375.74	\$263.44	42.6%	\$284.17	\$215.42	31.9%
O'ahu Luxury	60.6%	71.1%	-10.6%	\$724.94	\$483.31	50.0%	\$438.95	\$343.77	27.7%
O'ahu Upper Upscale	80.5%	84.8%	-4.3%	\$287.26	\$257.23	11.7%	\$231.24	\$218.03	6.1%
O'ahu Upscale	80.3%	83.6%	-3.3%	\$210.14	\$191.67	9.6%	\$168.76	\$160.28	5.3%
O'ahu Upper Midscale	78.0%	83.9%	-5.9%	\$168.53	\$154.43	9.1%	\$131.48	\$129.55	1.5%
O'ahu Midscale & Economy	81.5%	87.1%	-5.6%	\$151.80	\$130.47	16.4%	\$123.79	\$113.67	8.9%
Maui County	64.4%	78.5%	-14.1%	\$558.15	\$403.40	38.4%	\$359.31	\$316.65	13.5%
Wailea	74.7%	89.7%	-15.0%	\$774.56	\$613.26	26.3%	\$578.28	\$549.84	5.2%
Lahaina/Kā'anapali/Kapalua	62.0%	77.8%	-15.8%	\$451.77	\$338.38	33.5%	\$280.22	\$263.32	6.4%
Other Maui County	67.0%	79.4%	-12.4%	\$667.63	\$484.75	37.7%	\$447.20	\$384.71	16.2%
Maui County Luxury	68.7%	82.0%	-13.2%	\$940.22	\$661.02	42.2%	\$646.33	\$541.94	19.3%
Maui County Upper Upscale & Upscale	63.4%	78.4%	-14.9%	\$421.35	\$320.82	31.3%	\$267.28	\$251.42	6.3%
Island of Hawai'i	73.4%	76.9%	-3.5%	\$440.24	\$266.34	65.3%	\$323.29	\$204.89	57.8%
Kohala Coast	75.5%	77.6%	-2.1%	\$591.93	\$376.85	57.1%	\$446.87	\$292.28	52.9%
Kaua'i	76.9%	72.1%	4.8%	\$416.87	\$285.94	45.8%	\$320.77	\$206.16	55.6%

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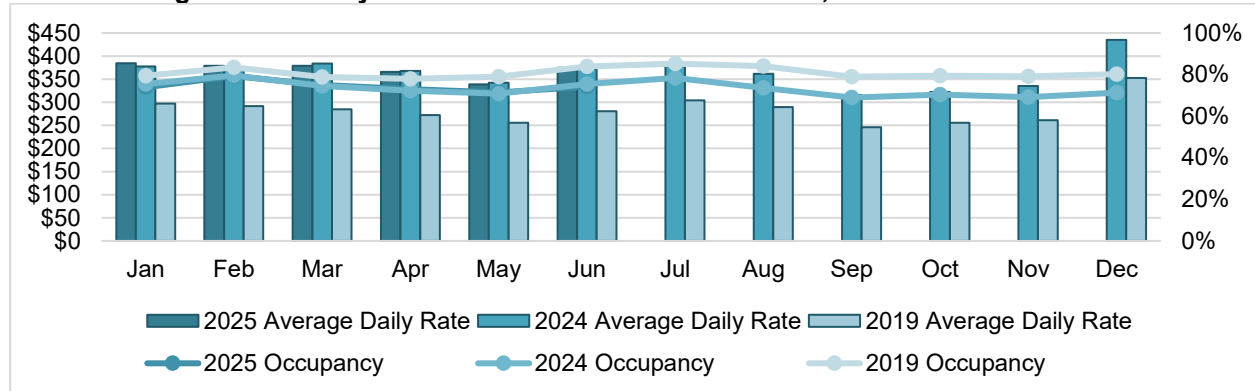
Note: Samples for some classes and regions were insufficient for reporting purposes, but these data were included in island and statewide totals.

Figure 8: Hawai'i Hotel Performance by Measure Year-to-Date June 2025 vs. 2019

	Supply (thousands)			Demand (thousands)			Revenue (millions)		
	2025	2019	% Change	2025	2019	% Change	2025	2019	% Change
State of Hawai'i	10,219.6	9,795.0	4.3%	7,604.0	7,880.9	-3.5%	2,815.9	2,206.5	27.6%
O'ahu	5,627.3	5,499.4	2.3%	4,420.0	4,579.8	-3.5%	1,245.7	1,067.9	16.6%
Waikiki	4,736.9	4,718.7	0.4%	3,746.5	3,941.5	-4.9%	992.7	899.8	10.3%
Maui County	2,439.8	2,303.4	5.9%	1,570.7	1,808.1	-13.1%	876.7	729.4	20.2%
Wailea	461.7	397.1	16.3%	344.7	356.1	-3.2%	267.0	218.4	22.3%
Lahaina/Kā'anapali/Kapalua	1,284.3	1,291.4	-0.6%	796.6	1,005.0	-20.7%	359.9	340.1	5.8%
Island of Hawai'i	1,220.7	1,171.6	4.2%	896.4	901.3	-0.5%	394.6	240.0	64.4%
Kohala Coast	520.4	543.0	-4.2%	392.9	420.6	-6.6%	232.5	158.5	46.7%
Kaua'i	931.8	820.6	13.5%	717.0	591.7	21.2%	298.9	169.2	76.7%

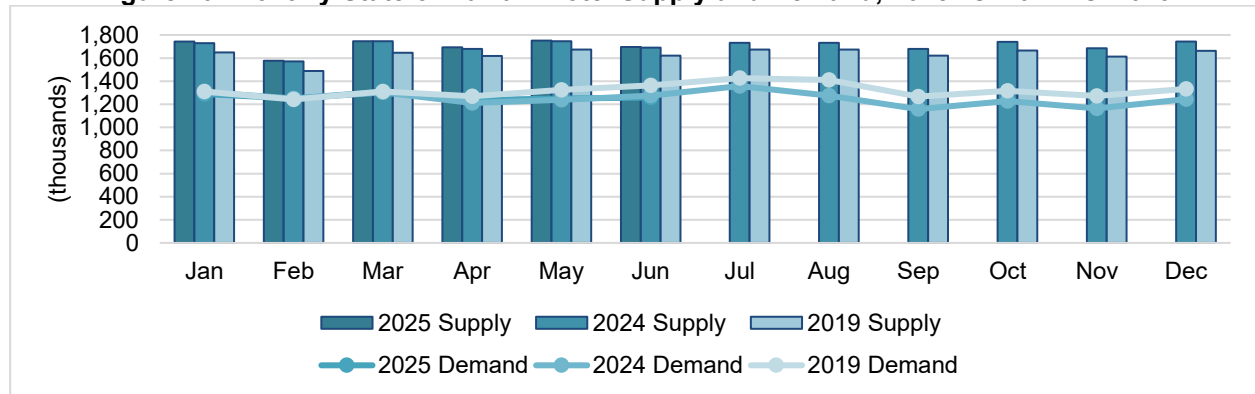
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Figure 9: Monthly State of Hawai'i Hotel Performance, 2025 vs. 2024 vs. 2019



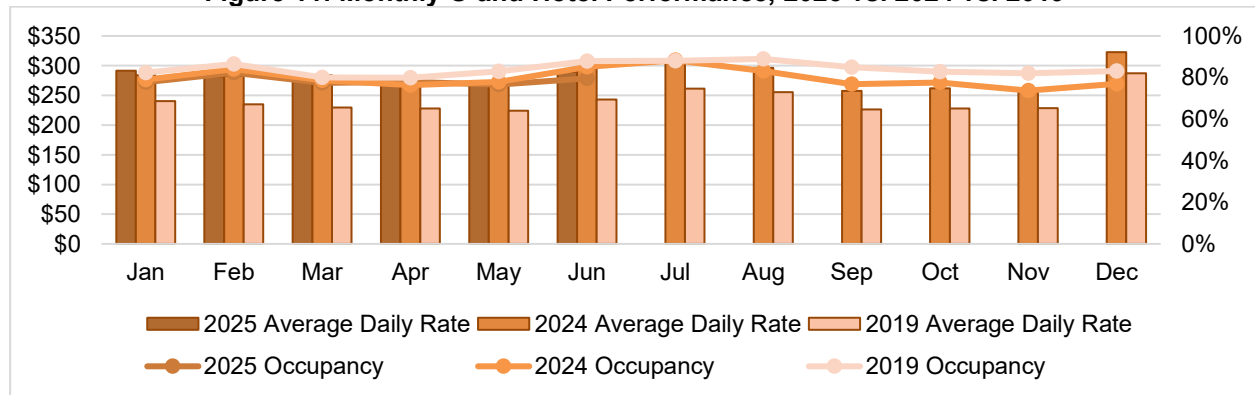
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Figure 10: Monthly State of Hawai'i Hotel Supply and Demand, 2025 vs. 2024 vs. 2019



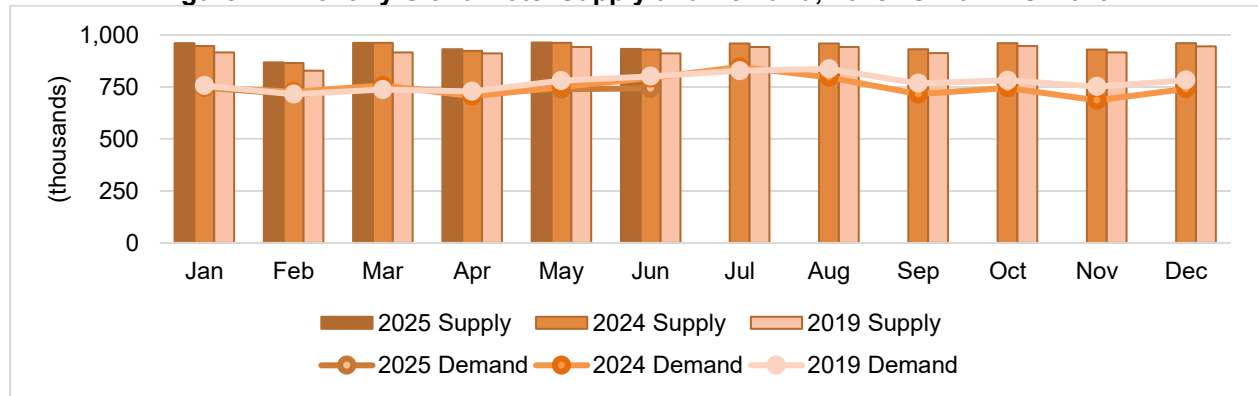
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Figure 11: Monthly O'ahu Hotel Performance, 2025 vs. 2024 vs. 2019



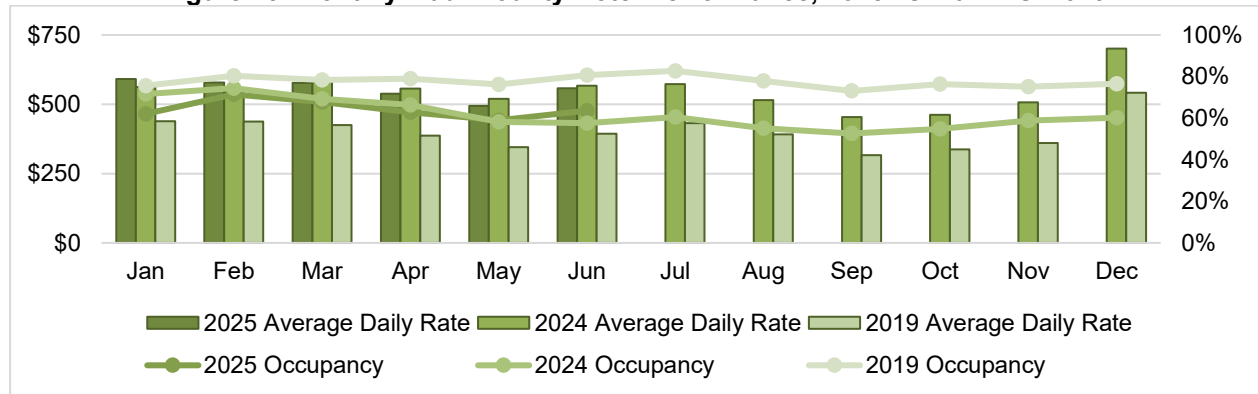
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Figure 12: Monthly O'ahu Hotel Supply and Demand, 2025 vs. 2024 vs. 2019



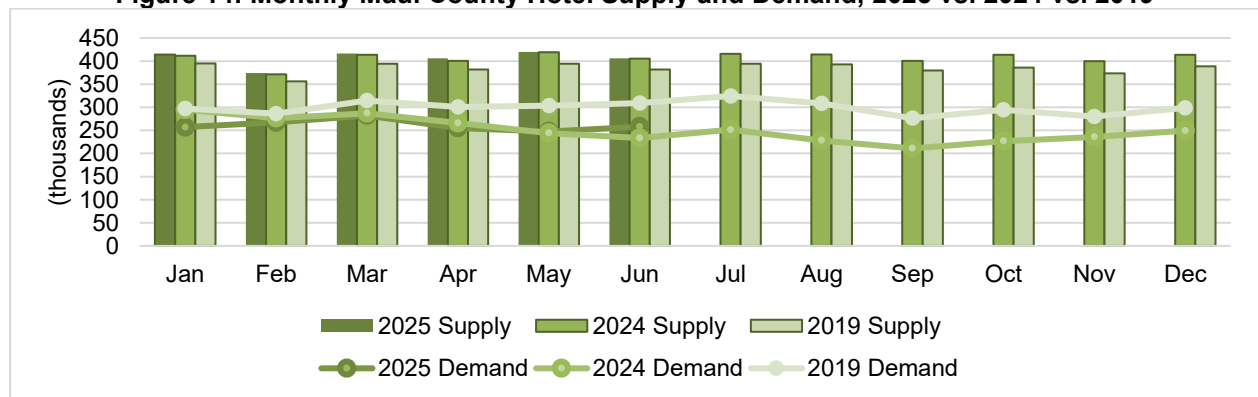
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Figure 13: Monthly Maui County Hotel Performance, 2025 vs. 2024 vs. 2019



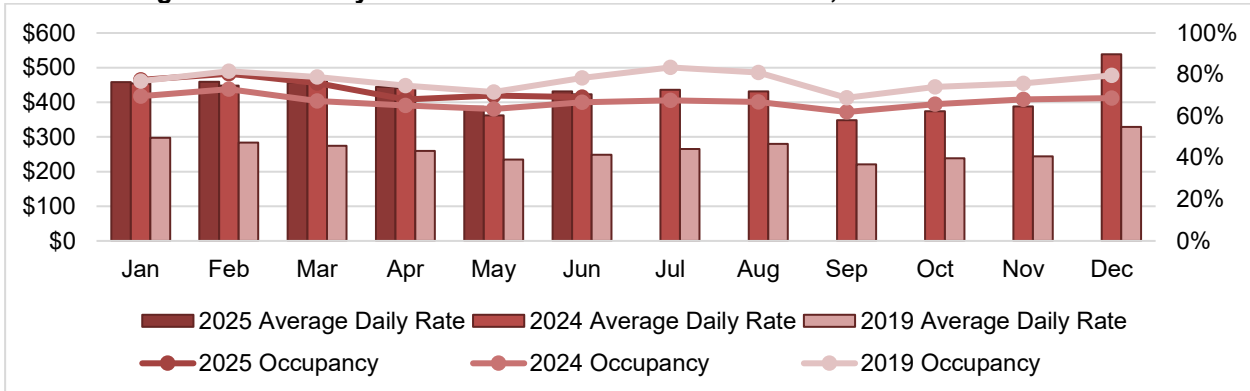
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Figure 14: Monthly Maui County Hotel Supply and Demand, 2025 vs. 2024 vs. 2019



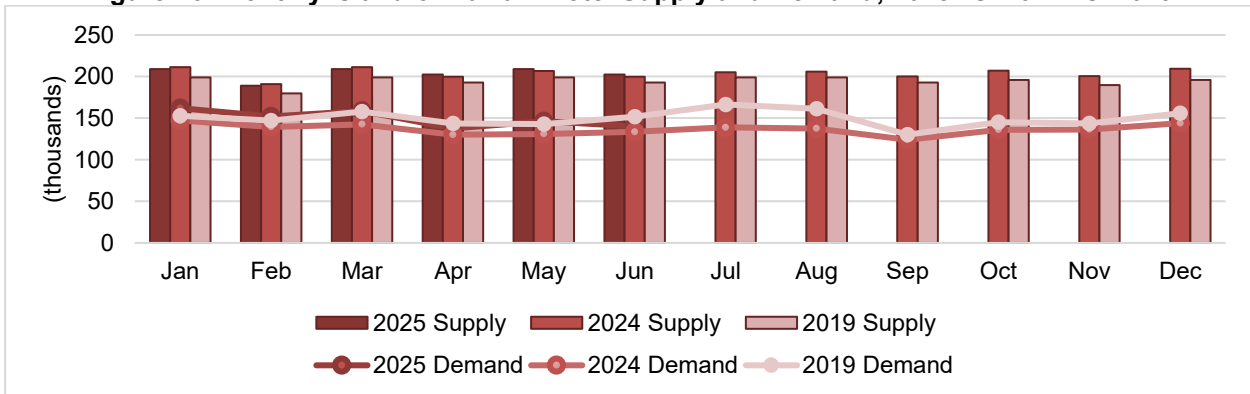
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Figure 15: Monthly Island of Hawai'i Hotel Performance, 2025 vs. 2024 vs. 2019



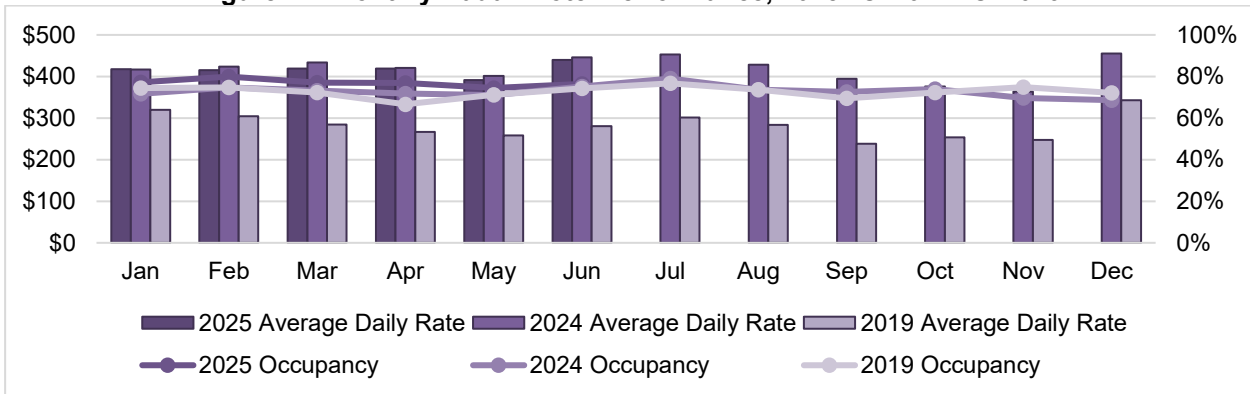
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Figure 16: Monthly Island of Hawai'i Hotel Supply and Demand, 2025 vs. 2024 vs. 2019



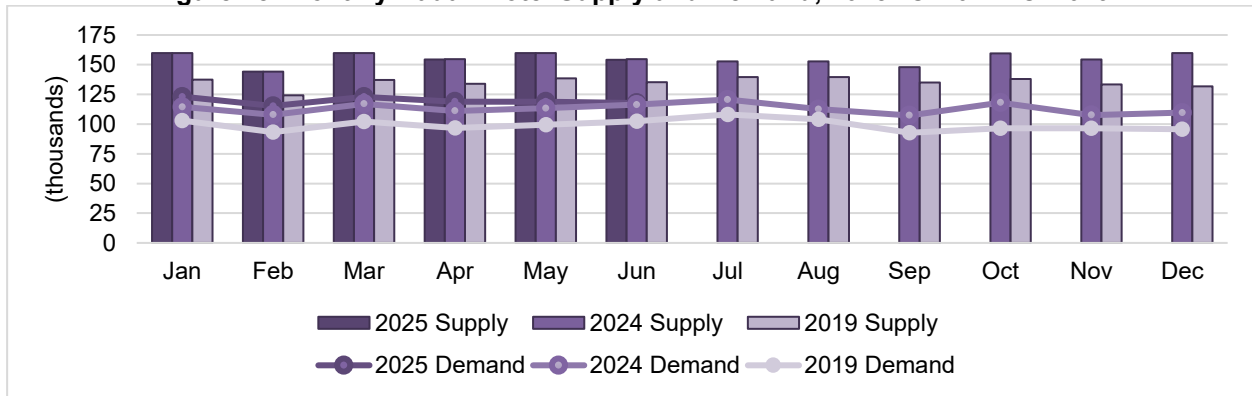
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Figure 17: Monthly Kaua'i Hotel Performance, 2025 vs. 2024 vs. 2019



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Figure 18: Monthly Kaua'i Hotel Supply and Demand, 2025 vs. 2024 vs. 2019



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Figure 19: Top 5 U.S. Markets – Revenue Per Available Room – YTD June 2025

Rank	Destination	Revenue Per Available Room	% Change
1	Hawaiian Islands	\$275.54	-0.1%
2	New York, NY	\$236.42	4.8%
3	Miami, FL	\$196.79	3.1%
4	Orlando, FL	\$158.40	4.5%
5	Boston, MA	\$157.50	1.0%

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Figure 20: Top 5 U.S. Markets – Average Daily Rate – YTD June 2025

Rank	Destination	Average Daily Rate	% Change
1	Hawaiian Islands	\$370.32	0.2%
2	New York, NY	\$291.05	4.4%
3	Miami, FL	\$251.01	2.5%
4	San Francisco/San Mateo, CA	\$231.09	4.0%
5	Boston, MA	\$222.91	1.7%

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Figure 21: Top 5 U.S. Markets – Occupancy – YTD June 2025

Rank	Destination	Occupancy	Percentage Pt. Change
1	New York, NY	81.2%	0.3%
2	Miami, FL	78.4%	0.5%
3	Tampa Bay, FL	76.4%	2.3%
4	Las Vegas, NV	75.4%	-5.8%
5	Hawaiian Islands	74.4%	-0.3%

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Figure 22: Competitive Sun and Sea Destinations – Revenue Per Available Room – YTD June 2025

Rank	Destination	Revenue Per Available Room	% Change
1	French Polynesia	\$464.03	-0.5%
2	Maldives	\$451.01	9.0%
3	Maui County	\$359.31	-2.4%
4	Aruba	\$351.48	-0.2%
5	Hawai'i Island	\$323.29	10.1%
6	Kaua'i	\$320.77	3.2%
7	Cabo San Lucas+	\$274.02	2.6%
8	Puerto Rico	\$244.21	1.1%
9	O'ahu	\$221.37	-2.2%
10	Cancun+	\$217.42	-0.7%
11	Costa Rica	\$192.74	2.3%
12	Fiji	\$172.84	-1.5%
13	Puerto Vallarta+	\$156.78	1.7%
14	Phuket	\$120.59	12.0%
15	Bali	\$94.84	1.9%

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Figure 23: Competitive Sun and Sea Destinations – Average Daily Rate – YTD June 2025

Rank	Destination	Average Daily Rate	% Change
1	French Polynesia	\$726.65	3.5%
2	Maldives	\$664.58	4.2%
3	Maui County	\$558.15	0.2%
4	Aruba	\$484.21	5.7%
5	Cabo San Lucas+	\$453.70	3.7%
6	Hawai'i Island	\$440.24	1.2%
7	Kaua'i	\$416.87	-1.5%
8	Puerto Rico	\$324.11	3.0%
9	Cancun+	\$293.64	1.8%
10	O'ahu	\$281.84	-0.2%
11	Costa Rica	\$281.57	7.8%
12	Fiji	\$251.23	3.0%
13	Puerto Vallarta+	\$210.71	2.2%
14	Phuket	\$176.59	19.5%
15	Bali	\$142.67	6.2%

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Figure 24: Competitive Sun and Sea Destinations – Occupancy – YTD June 2025

Rank	Destination	Occupancy	Percentage Pt. Change
1	O'ahu	78.5%	-1.6%
2	Kaua'i	76.9%	3.5%
3	Puerto Rico	75.3%	-1.4%
4	Puerto Vallarta+	74.4%	-0.3%
5	Cancun+	74.0%	-1.8%
6	Hawai'i Island	73.4%	6.0%
7	Aruba	72.6%	-4.3%
8	Fiji	68.8%	-3.2%
9	Costa Rica	68.5%	-3.7%
10	Phuket	68.3%	-4.6%
11	Maldives	67.9%	2.9%
12	Bali	66.5%	-2.8%
13	Maui County	64.4%	-1.7%
14	French Polynesia	63.9%	-2.6%
15	Cabo San Lucas+	60.4%	-0.6%

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