

Fact Sheet: Benefits of Hawai'i's Tourism Economy

Hawai'i Tourism Industry in February 2024¹

In February 2024, a total of 772,480 visitors arrived in the Hawaiian Islands and total visitor spending measured in nominal dollars was \$1.66 billion. There were 753,750 total visitors in February 2023 and total visitor spending was \$1.64 billion. In pre-pandemic February 2019, there were 780,827 total visitors and visitor spending was \$1.39 billion.

Though both visitor arrivals and expenditures increased as compared with the same month last year, February 2024 visitor statistics included an extra leap-year day and figures are not directly comparable to 2023 and 2019. For direct comparison with February 2023 and February 2019 visitor data, average daily census, the average number of visitors present in Hawai'i on any given day, and daily visitor spending are better measures of visitor industry performance. In February 2024, the average daily census of 236,008 total visitors declined compared to the average daily census for February 2023 (243,842 visitors, -3.2%) and the average daily census for February 2019 (246,741 visitors, -4.4%). In February 2024, daily average visitor spending was \$57.1 million per day, down from February 2023 (\$58.5 million per day, -2.4%), but higher than February 2019 (\$49.6 million per day, +15.2%). Since the August 2023 Maui wildfires, both average daily visitor census and daily visitor spending have recorded seven consecutive months of year-over-year decreases.

Hawai'i Tourism Industry in the First Two Months of 2024:

- **Total Visitor Spending: \$3.47 billion.** Total visitor spending was \$3.53 billion in the first two months of 2023 and \$3.01 billion in the first two months of 2019.
- **State Tax Revenue (direct, indirect, and induced): \$401.9 million.** \$412.3 billion in the first two months of 2023 and \$350.8 billion in the first two months of 2019.
- **Visitor Arrivals: 1,535,959 visitors.** There were 1,545,531 total visitors in the first two months of 2023 and 1,598,428 total visitors in the first two months of 2019.
- **Average Daily Census²: 239,465 visitors.** There were 252,259 visitors in the first two months of 2023 and 254,882 visitors in the first two months of 2019.
- **Total Air Service: 9,568 transpacific flights with 2,146,430 seats.** There were 9,870 flights with 2,185,734 seats in the first two months of 2023 and 9,769 flights with 2,145,143 seats in the first two months of 2019.

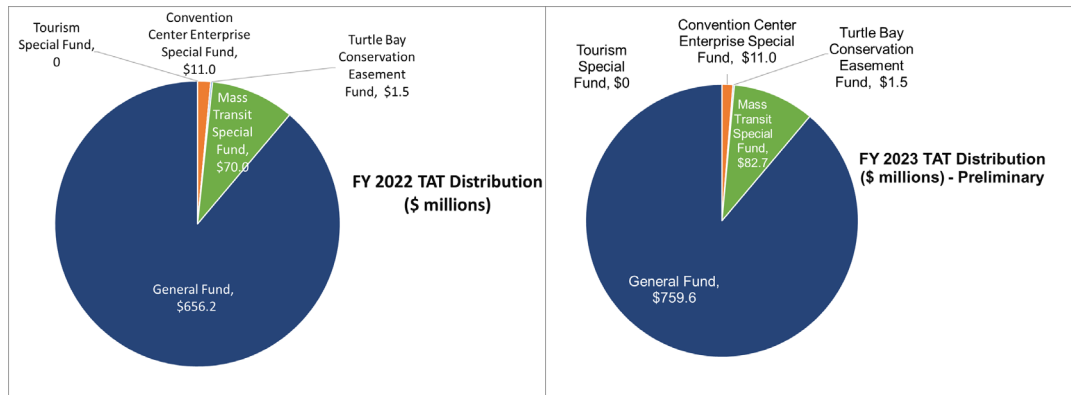
TAT Collections (Fiscal Year)

- FY 2018: The state collected \$554.9 million in TAT; an increase of 9.2 percent compared to FY 2017. (The TAT rate was increased to 10.25 percent, effective January 1, 2018. Tax revenues generated to be allocated to the Mass Transit Special Fund).
- FY 2019: The state collected \$600.3 million in TAT; an increase of 8.2 percent compared to FY 2018.
- FY 2020: The state collected \$564.3 million in TAT, down 6.0 percent compared to FY 2019.
- FY 2021: The state collected \$215.3 million in TAT; a decrease of 61.8 percent compared to FY 2020.
- FY2022: The state collected \$738.7 million in TAT; an increase of 243.1 percent compared to FY 2021.
- FY2023: The state collected \$865.3 million in TAT; an increase of 17.1 percent compared to FY 2022.

¹ 2023 and 2024 visitor statistics are preliminary. 2019 - 2022 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

² Average daily census measures the number of visitors present on any given day.

- For FY2024 (July 2023 - February 2024), the state collected \$511.4 million in TAT, compared \$582.7 million (-12.2%) collected in FY 2023 (July 2022 – February 2023), and \$457.5 million (+11.8%) collected in FY 2020 (July 2019 – February 2020) (Preliminary data from Dept of Taxation).



Hawai'i Tourism Industry in Calendar Year 2023:

- **Total Visitor Spending (Air and Cruise only, does not include Supplemental Business): \$20.78 billion**, up from \$19.70 billion (+5.5%) in 2022 and \$17.72 billion (+17.3%) in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.41 billion**, compared to \$2.30 billion (+4.8%) in 2022 and \$2.07 billion (+16.6%) in 2019.
- **Visitor Arrivals: 9,644,519 visitors**, up 4.4 percent from 9,233,983 visitors in 2022. Total arrivals declined 7.1 percent when compared to 10,386,673 visitors in 2019.
- **Average Daily Census³: 236,547 visitors**, compared to 233,534 visitors (+1.3%) in 2022 and 247,564 visitors (-4.5%) in 2019.
- **Jobs supported (direct, indirect, induced): 212,000.**
- **Total Air Service: 59,725 transpacific flights with 13,118,442 seats**, compared to 60,153 flights (-0.7%) with 12,745,630 seats (+2.9%) in 2022 and 61,778 flights (-3.3%) with 13,619,247 seats (-3.7%) in 2019.

Hawai'i Tourism Industry in Calendar Year 2022

- **Total Visitor Spending (Air, Cruise and Supplemental Business): \$19.80 billion**, up 11.0 percent from \$17.84 billion in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.30 billion**, compared to \$2.08 billion (+10.3%) in 2019.
- **Visitor Arrivals (Air and Cruise): 9,233,983 visitors**, down 11.1 percent from 10,386,673 visitors in 2019.
- **Average Daily Census: 233,534 visitors**, compared to 247,564 visitors (-5.6%) in 2019.
- **Jobs supported (direct, indirect, induced): 202,000.**
- **Total Air Service: 60,153 trans-Pacific flights and 12,745,630 seats**, compared to 61,778 flights (-2.6%) and 13,619,247 seats (-6.4%) in 2019.

Hawai'i Tourism Industry in Calendar Year 2021

- **Total Visitor Spending (Air, Cruise and Supplemental Business): \$13.15 billion.** Visitor spending declined 26.3 percent from \$17.84 billion in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$1.54 billion;** a decrease of 26.3 percent from \$2.08 billion in 2019.

³ Average daily census measures the number of visitors present on any given day.

- **Visitor Arrivals (Air and Cruise): 6,777,760 visitors (+150.3%),** more than double the arrival count of 2,708,258 from 2020. Total visitor arrivals decreased 34.7 percent compared to the 10,386,673 visitors in 2019.
- **Average Daily Census: 178,938 visitors;** compared to 78,305 visitors in 2020, versus 247,564 visitors in 2019.
- **Jobs supported (direct, indirect, induced): 160,000.**
- **Total Air Service: 51,904 trans-Pacific flights and 10,735,084 seats;** compared to 24,372 flights and 5,318,667 seats in 2020, versus 61,778 flights and 13,619,247 seats in 2019.

Hawai'i Tourism Industry in Calendar Year 2020

- **Visitor Spending:** NA⁴
- **State Tax Revenue (direct, indirect, and induced):** NA
- **Visitor Arrivals (Air and Cruise):** 2,708,258 (-73.9% compared to 2019).
- **Average Daily Census:** 77,915 visitors (-68.3% compared to 2019).
- **Total Air Seats:** 5,318,667 (-60.9% versus 2019).

Hawai'i Tourism Industry in Calendar Year 2019

- **Visitor Spending (Air, Cruise and Supplemental Business):** \$17.84 billion (+1.1%, versus 2018).
- **State Tax Revenue (direct, indirect, and induced):** \$2.08 billion (+1.1%, versus 2018).
- **Visitor Arrivals (Air and Cruise):** 10,386,673 (+5.0% versus 2018).
- **Average Daily Census:** 247,564 visitors (+2.4% versus 2018).
- **Jobs supported (direct, indirect, induced):** 217,000.
- **Total Air Seats:** 13,619,349 (+2.9% YOY versus 2018).

Hotel Occupancy Rates:

Occupancy Rate	2023	2022	2021	2020	2019	2018	2017	2016
State	74.7%	73.6%	57.5%	37.6%	80.7%	80.3%	80.2%	79.1%
O'ahu	79.6%	75.4%	55.6%	39.2%	84.0%	83.7%	83.5%	84.2%
Maui County	66.1%	67.6%	60.3%	34.6%	77.7%	75.9%	77.0%	75.8%
Island of Hawai'i	70.2%	74.9%	60.5%	39.7%	77.0%	74.6%	74.8%	68.7%
Kaua'i	74.6%	77.7%	57.2%	33.2%	72.5%	77.5%	75.7%	72.6%

Source: STR, Inc.

Historical Visitor Spending and Job Supported data:

Year	Total Daily Expenditures, Includes Sup Business	# of Jobs Supported
2022	\$54.3 million	202,000
2021	\$36.0 million	160,000
2020	NA	NA
2019	\$48.9 million	217,000
2018	\$48.3 million	215,000
2017	\$46.0 million	205,000
2016	\$43.5 million	194,000
2015	\$41 million	177,000
2014	\$41 million	168,000
2013	\$40 million	163,000
2012	\$39 million	161,000

⁴ Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April through October 2020 due to COVID-19 restrictions.