

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

### Hawai'i Tourism Industry in January 2024<sup>1</sup>

In January 2024, total visitor arrivals to the Hawaiian Islands (763,480 visitors, -3.6%) and total visitor spending measured in nominal dollars (\$1.81 billion, -4.5%) declined compared to January 2023, according to preliminary statistics from the Department of Business, Economic Development and Tourism (DBEDT). Since the August 2023 Maui wildfires, total visitor arrivals were down in five out of the last six months while total visitor spending recorded six consecutive months of decreases from 2023. When compared to pre-pandemic 2019 levels, January 2024 total visitor arrivals represents a 93.4 percent recovery from January 2019 and total visitor spending was higher than January 2019 (\$1.62 billion, +11.9%).

In January 2024, 745,644 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 17,836 visitors came via out-of-state cruise ships. In comparison, 775,132 visitors (-3.8%) arrived by air and 16,648 visitors (+7.1%) came by cruise ships in January 2023, and 805,567 visitors (-7.4%) arrived by air and 12,033 visitors (+48.2%) came by cruise ships in January 2019. The average length of stay by all visitors in January 2024 was 9.85 days, compared to 10.16 days (-3.0%) in January 2023 and 9.94 days (-0.9%) in January 2019. The statewide average daily census was 242,700 visitors in January 2024, compared to 259,514 visitors (-6.5%) in January 2023 and 262,235 visitors (-7.4%) in January 2019.

### Hawai'i Tourism Industry in January 2024:

- **Total Visitor Spending: \$1.81 billion**, compared to \$1.89 billion (-4.5%) in January 2023 and \$1.62 billion (+11.9%) in January 2019.
- **State Tax Revenue (direct, indirect, and induced): \$209.9 million**, compared to \$221.2 billion (-5.1%) in January 2023 and \$188.7 billion (+11.2%) in January 2019.
- **Visitor Arrivals: 763,480 visitors**, a decrease of 3.6 percent from 791,781 visitors in January 2023. Total arrivals declined 6.6 percent when compared to 817,600 visitors in January 2019.
- **Average Daily Census<sup>2</sup>: 242,700 visitors**, compared to 259,514 visitors (-6.5%) in January 2023 and 262,235 visitors (-7.4%) in January 2019.
- **Total Air Service: 4,884 transpacific flights with 1,100,758 seats**, compared to 5,211 flights (-6.3%) with 1,156,026 seats (-4.8%) in January 2024 and 5,158 flights (-5.3%) with 1,134,182 seats (-2.9%) in January 2019.

### TAT Collections (Fiscal Year)

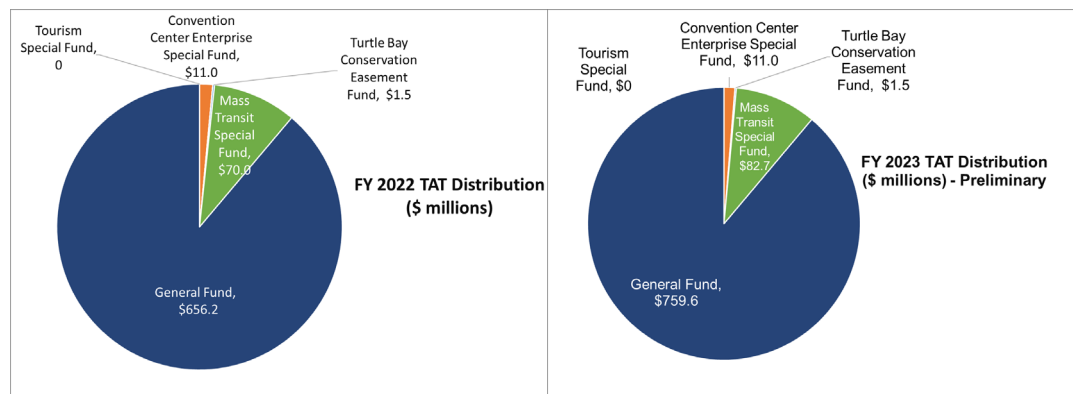
- FY 2018: The state collected \$554.9 million in TAT; an increase of 9.2 percent compared to FY 2017. (The TAT rate was increased to 10.25 percent, effective January 1, 2018. Tax revenues generated to be allocated to the Mass Transit Special Fund).
- FY 2019: The state collected \$600.3 million in TAT; 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.

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<sup>1</sup> 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.

<sup>2</sup> Average daily census measures the number of visitors present on any given day.

- For FY2024 (July-December 2023), the state collected \$357.6 million in TAT, compared \$421.8 million (-15.2%) collected in FY 2023 (July-December 2022), \$330.4 million (+8.2%) collected in FY 2022 (July-December 2021), and \$319.7 million (+11.8%) collected in FY 2020 (July-December 2019) (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 Census<sup>3</sup>: 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.

<sup>3</sup> 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:** NA<sup>4</sup>
- **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

<sup>4</sup> 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.