

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

Hawai'i Tourism Industry in March 2023¹

A total of 900,800 visitors arrived in the Hawaiian Islands in March 2023, an increase of 14.2 percent from March 2022. When compared to 2019, the benchmark year prior to the COVID-19 pandemic, this represents a 97.0 percent recovery in total visitor arrivals from March 2019. As measured in nominal dollars, these visitors spent \$1.84 billion in March 2023, up from \$1.53 billion (+20.4%) in March 2022 and \$1.49 billion (+23.4%) in March 2019.

In March 2023, 892,239 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 8,561 visitors arrived by cruise ships during the month. In March 2022, 785,715 visitors arrived by air (+13.6%) and 3,216 visitors came by cruise ships (+166.2%). In March 2019, 917,026 visitors arrived by air (-2.7%) and 11,824 visitors came by cruise ships (-27.6%). The average length of stay by all visitors in March 2023 was 8.69 days, compared to 8.91 days (-2.5%) in March 2022 and 8.36 days (+4.0%) in March 2019.

Hawai'i Tourism Industry in The First Quarter of 2023:

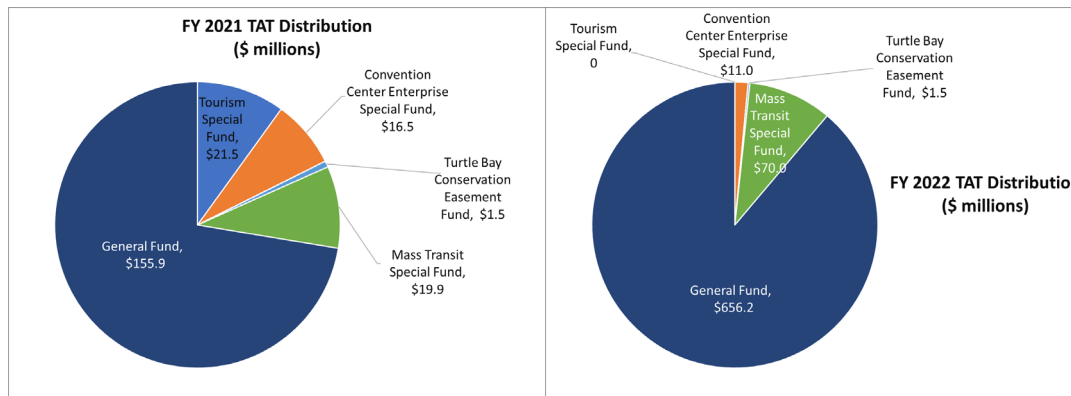
- **Total Visitor Spending: \$5.37 billion**, compared to 4.23 billion (+26.8%) in the first quarter of 2022, and from \$4.49 billion (+19.5%) in the first quarter of 2019.
- **State Tax Revenue (direct, indirect, and induced): \$622.9 million**, compared to \$494.2 million (+26.0%) in the first quarter of 2022 and \$350.8 million (+16.8%) in the first quarter of 2019.
- **Visitor Arrivals: 2,446,331 visitors**, compared to 1,993,761 visitors (+22.7%) in the first quarter of 2022 and 2,527,277 visitors (-3.2%) in the first quarter of 2019.
- **Average Daily Census²: 252,388 visitors**, compared to 213,432 visitors (+18.3%) in the first quarter of 2022 and 253,382 visitors (-0.4%) in the first quarter of 2019.
- **Total Air Service: 15,288 trans-Pacific flights with 3,384,098 seats**, compared to 15,000 flights (+1.9%) with 3,137,184 seats (+7.9%) in the first quarter of 2022, and 15,214 flights (+0.5%) with 3,337,280 seats (+1.4%) in the first quarter of 2019.

TAT Collections

- 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: Through March 2023, the state collected \$650.8 million in TAT, compared to \$526.8 million (+23.5%) collected in FY 2022 through March 2022, and \$449.8 million (+44.7%) collected in FY 2019 through March 2019 (Preliminary data from Dept of Taxation).

¹ 2023 and 2022 visitor statistics are preliminary. 2021, 2020 and 2019 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.



Hawai'i Tourism Industry in 2022

- **Total Visitor Spending (Air and Cruise): \$19.29 billion**, up 8.9 percent from \$17.72 billion in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.24 billion**, compared to \$2.07 billion (+8.2%) in 2019.
- **Visitor Arrivals (Air and Cruise): 9,247,848 visitors**, down 11.0 percent from 10,386,673 visitors in 2019.
- **Average Daily Census: 233,604 visitors**, compared to 247,564 visitors (-5.6%) in 2019.
- **Jobs supported (direct, indirect, induced): 197,000.**
- **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 2021

- **Total Visitor Spending (Air and Cruise): \$13.13 billion.** Visitor spending declined 25.9 percent from \$17.7 billion in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$1.53 billion;** a decrease of 25.9 percent from \$2.07 billion in 2019.
- **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 2020

- **Visitor Spending: NA³**
- **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).**

³ 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.

Hawai'i Tourism Industry in 2019

- **Visitor Spending (Air and Cruise):** \$17.72 billion (+1.2%, +\$206.4 million YOY versus 2018).
- **State Tax Revenue (direct, indirect, and induced):** \$2.07 billion (+1.2%, +\$24.1 million YOY versus 2018).
- **Visitor Arrivals (Air and Cruise):** 10,386,673 (+5.0% YOY versus 2018).
- **Average Daily Census:** 247,564 visitors (+2.4% versus 2018).
- **Jobs supported (direct, indirect, induced):** 216,000.
- **Total Air Seats:** 13,619,349 (+2.9% YOY versus 2018).

Hotel Occupancy Rates:

Occupancy Rate	2021	2020	2019	2018	2017	2016	2015
State	57.6%	37.6%	80.7%	80.3%	80.2%	79.1%	78.7%
O'ahu	55.6%	39.2%	84.0%	83.7%	83.5%	84.2%	85.1%
Maui County	60.2%	34.6%	77.7%	75.9%	77.0%	75.8%	74.3%
Island of Hawai'i	61.1%	39.7%	77.0%	74.6%	74.8%	68.7%	65.7%
Kaua'i	58.5%	33.2%	72.5%	77.5%	75.7%	72.6%	71.1%

Source: STR, Inc.

Historical Visitor Spending and Job Supported data:

Year	Total Daily Expenditures, Includes Sup Business	# of Jobs Supported
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	174,000
2013	\$40 million	168,000
2012	\$39 million	167,000
2011	\$34 million	156,000
2010	\$30 million	145,000