Fact Sheet: Benefits of Hawai‘i’s Tourism Economy

Hawai‘i Tourism Industry in August 2023¹

A total of 769,163 visitors came to the Hawaiian Islands in August 2023, down 7.3 percent from August 2022. When compared to pre-pandemic 2019, the benchmark year prior to the COVID-19 pandemic, this represents an 83.0 percent recovery in total visitor arrivals from August 2019. As measured in nominal dollars, total visitor spending was $1.58 billion in August 2023, a decrease from August 2022 ($1.74 billion, -9.2%), but higher than August 2019 ($1.50 billion, +5.4%).

In August 2023, 766,023 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 3,140 visitors came via a single cruise ship. August is typically a slow month for out-of-state cruise ships to the islands and there were no visitor arrivals by cruise ships in 2022 or in 2019. There were 829,772 visitors who arrived by air (-7.7%) in August 2022 and 926,417 visitors who arrived by air (-17.3%) in August 2019. The average length of stay by all visitors in August 2023 was 8.67 days, compared to 9.04 days (-4.1%) in August 2022 and 8.46 days (+2.4%) in August 2019.

Days after the devastating Lahaina wildfires on August 8, 2023, government officials strongly discouraged non-essential travel to West Maui. This messaging may have impacted travel to other islands. In August 2023, visitor arrivals to O‘ahu (507,702 visitors, +11.0%), Hawai‘i Island (152,951, +4.1%) and Kaua‘i (131,628 visitors, +9.0%) increased while visitor arrivals to Maui (112,259 visitors, -57.8%) dropped significantly compared to August 2022.

Hawai‘i Tourism Industry in The First Eight Months of 2023:

- **Total Visitor Spending**: $14.41 billion, up from $13.10 billion (+10.1%) in the first eight months of 2022 and from $12.06 billion (+19.6%) in the first eight months of 2019.
- **State Tax Revenue (direct, indirect, and induced)**: $1.67 billion, compared to $1.53 billion (+9.4%) in the first eight months of 2022 and $1.41 billion (+18.8%) in the first eight months of 2019.
- **Visitor Arrivals**: 6,666,587 visitors, compared to 6,170,921 visitors (+8.0%) in the first eight months of 2022. Total arrivals declined 6.0 percent when compared to 7,092,809 visitors in the first eight months of 2019.
- **Average Daily Census**: 246,827 visitors, compared to 235,478 visitors (+4.8%) in the first eight months of 2022 and 254,988 visitors (-3.2%) in the first eight months of 2019.
- **Total Air Service**: 40,868 transpacific flights with 8,962,860 seats, compared to 41,078 flights (-0.5%) with 8,613,239 seats (+4.1%) in the first eight months of 2022 and 41,879 flights (-2.4%) with 9,217,268 seats (-2.8%) in the first eight months 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.

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¹ 2023 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.
FY2023: The state collected $865.3 million in TAT; an increase of 17.1 percent compared to FY 2022.

For FY2024 (July-August 2023), the state collected $158.2 million in TAT, compared to $165.2 million (-4.2%) collected in FY 2023 (July-August 2022), $134.2 million (+17.9%) collected in FY 2022 (July-August 2021), and $121.3 million (+30.4%) collected in FY 2020 (July-August 2019) (Preliminary data from Dept of Taxation).

Hawai'i Tourism Industry in 2022

- Total Visitor Spending (Air and Cruise): $19.70 billion, up 11.2 percent from $17.72 billion in 2019.
- State Tax Revenue (direct, indirect, and induced): $2.29 billion, compared to $2.07 billion (+10.5%) in 2019.
- Average Daily Census: 233,534 visitors, compared to 247,564 visitors (-5.6%) in 2019.
- Jobs supported (direct, indirect, induced): 201,000.
- 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

- 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 12,745,630 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: NA
- 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).

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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:

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<tbody>
<tr>
<td>State</td>
<td>73.6%</td>
<td>57.5%</td>
<td>37.6%</td>
<td>80.7%</td>
<td>80.3%</td>
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<tr>
<td>O'ahu</td>
<td>75.4%</td>
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<tr>
<td>Maui County</td>
<td>67.6%</td>
<td>60.3%</td>
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<td>Island of Hawai'i</td>
<td>74.9%</td>
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<tr>
<td>Kaua'i</td>
<td>77.7%</td>
<td>57.2%</td>
<td>33.2%</td>
<td>72.5%</td>
<td>77.5%</td>
<td>75.7%</td>
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Source: STR, Inc.

Historical Visitor Spending and Job Supported data:

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<th>Year</th>
<th>Total Daily Expenditures, Includes Sup Business</th>
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<td>$54.3 million</td>
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<tr>
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