

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

### Hawai'i Tourism Industry in November 2023<sup>1</sup>

After recording three consecutive months of decreases in both visitor arrivals and visitor spending, November 2023 data showed a modest growth in visitor arrivals, but total visitor spending continued to decline compared to a year ago. According to preliminary statistics from the Department of Business, Economic Development and Tourism (DBEDT), a total of 731,233 visitors came to the Hawaiian Islands in November 2023, up 0.3 percent from November 2022. When compared to pre-pandemic 2019, this represents a 90.4 percent recovery in total visitor arrivals from November 2019. As measured in nominal dollars, total visitor spending was \$1.53 billion in November 2023, a decrease from November 2022 (\$1.57 billion, -2.4%), but higher than November 2019 (\$1.34 billion, +14.2%).

In November 2023, 720,297 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 10,936 visitors came via out-of-state cruise ships. In comparison, 719,022 visitors (+0.2%) arrived by air and 9,866 visitors (+10.8%) came by cruise ships in November 2022, and 792,547 visitors (-9.1%) arrived by air and 16,529 visitors (-33.8%) came by cruise ships in November 2019. The average length of stay by all visitors in November 2023 was 8.75 days, compared to 9.05 days (-3.4%) in November 2022 and 8.30 days (+5.5%) in November 2019. The statewide average daily census<sup>2</sup> was 213,312 visitors in November 2023, compared to 220,001 visitors (-3.0%) in November 2022 and 223,746 visitors (-4.7%) in November 2019.

### Hawai'i Tourism Industry in The First 11 Months of Calendar Year 2023:

- **Total Visitor Spending: \$18.82 billion**, up from \$17.72 billion (+6.2%) in the first 11 months of 2022 and \$15.96 billion (+17.9%) in the first 11 months of 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.18 billion**, compared to \$2.07 billion (+5.6%) in the first 11 months of 2022 and \$1.86 billion (+17.2%) in the first 11 months of 2019.
- **Visitor Arrivals: 8,783,688 visitors**, up 5.0 percent from 8,362,096 visitors in the first 11 months of 2022. Total arrivals declined 6.9 percent when compared to 9,434,232 visitors in the first 11 months of 2019.
- **Average Daily Census<sup>3</sup>: 234,334 visitors**, compared to 230,350 visitors (+1.7%) in the first 11 months of 2022 and 244,097 visitors (-4.0%) in the first ten months of 2019.
- **Total Air Service: 54,605 transpacific flights with 11,991,327 seats**, compared to 54,867 flights (-0.5%) with 11,570,483 seats (+3.6%) in the first 11 months of 2022 and 56,100 flights (-2.7%) with 12,366,289 seats (-3.0%) in the first 11 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.

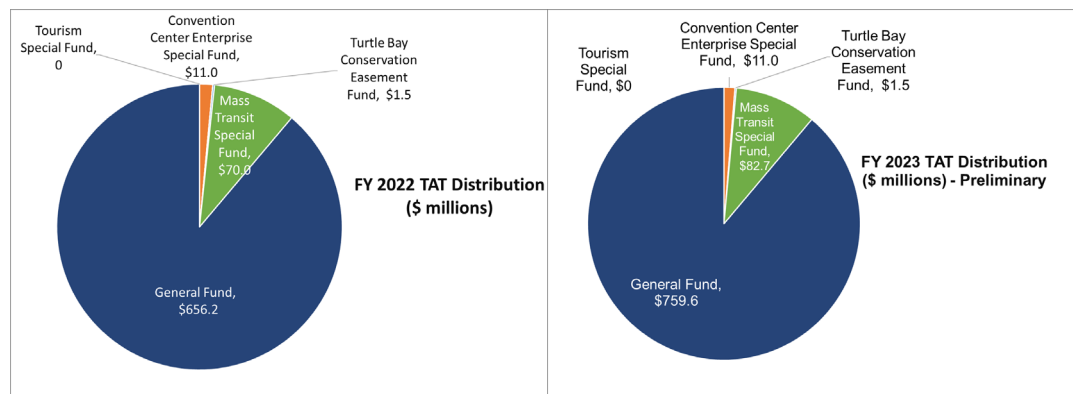
<sup>1</sup> 2023 visitor statistics are preliminary. 2019 - 2022 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

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

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- For FY2024 (July-November 2023), the state collected \$297.3 million in TAT, compared \$361.5 million (-17.8%) collected in FY 2023 (July-November 2022), \$282.2 million (+5.4%) collected in FY 2022 (July-November 2021), and \$273.1 million (+8.8%) collected in FY 2020 (July-November 2019) (Preliminary data from Dept of Taxation).



### Hawai'i Tourism Industry in Calendar Year 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.
- **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): 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 Calendar Year 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 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 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    | 2022  | 2021  | 2020  | 2019  | 2018  | 2017  | 2016  |
|-------------------|-------|-------|-------|-------|-------|-------|-------|
| State             | 73.6% | 57.5% | 37.6% | 80.7% | 80.3% | 80.2% | 79.1% |
| O'ahu             | 75.4% | 55.6% | 39.2% | 84.0% | 83.7% | 83.5% | 84.2% |
| Maui County       | 67.6% | 60.3% | 34.6% | 77.7% | 75.9% | 77.0% | 75.8% |
| Island of Hawai'i | 74.9% | 60.5% | 39.7% | 77.0% | 74.6% | 74.8% | 68.7% |
| Kaua'i            | 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                                    | 174,000             |
| 2013 | \$40 million                                    | 168,000             |
| 2012 | \$39 million                                    | 167,000             |
| 2011 | \$34 million                                    | 156,000             |
| 2010 | \$30 million                                    | 145,000             |

<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.