

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

Hawai'i Tourism Industry in December 2023¹

Total visitor arrivals to the Hawaiian Islands (860,831 visitors, -1.3%) and total visitor spending measured in nominal dollars (\$1.96 billion, -1.2%) were down slightly in December 2023, compared to December 2022. However, visitor spending during the calendar year increased over 2022. Since the August 2023 Maui wildfires, visitor arrivals have decreased in four out of the last five months while visitor spending recorded five straight months of decline compared to 2022. When compared to pre-pandemic 2019 levels, December 2023 total visitor arrivals represents a 90.4 percent recovery from December 2019 and total visitor spending was higher than December 2019 (\$1.75 billion, +11.6%).

In December 2023, 845,621 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 15,210 visitors came via out-of-state cruise ships. In comparison, 858,269 visitors (-1.5%) arrived by air and 13,618 visitors (+11.7%) came by cruise ships in December 2022, and 941,128 visitors (-10.1%) arrived by air and 11,313 visitors (+34.4%) came by cruise ships in December 2019. The average length of stay by all visitors in December 2023 was 9.38 days, compared to 9.52 days (-1.5%) in December 2022 and 9.27 days (+1.1%) in December 2019. The statewide average daily census¹ was 260,395 visitors in December 2023, compared to 267,834 visitors (-2.8%) in December 2022 and 284,924 visitors (-8.6%) in December 2019.

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 Census²: 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.

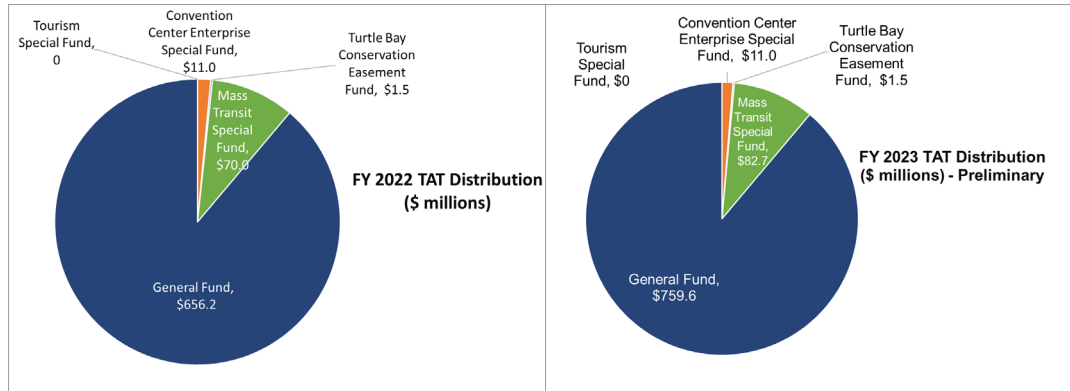
TAT Collections (Fiscal Year)

- 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 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-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 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.
- **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: NA³**
- **State Tax Revenue (direct, indirect, and induced): NA**
- **Visitor Arrivals (Air and Cruise): 2,708,258 (-73.9% compared to 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.

- **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 |
| 2011 | \$34 million | 137,000 |
| 2010 | \$31 million | 126,000 |