

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

Hawai'i Tourism Industry in July 2024¹

There were 925,935 visitors to the Hawaiian Islands in July 2024, down 1.0 percent from the same month last year. Total visitor spending measured in nominal dollars was \$2.07 billion, a growth of 2.6 percent from July 2023. July 2024 total visitor arrivals represent a 93.0 percent recovery compared to pre-pandemic July 2019 and total visitor spending was higher than July 2019 (\$1.70 billion, +22.0%).

In July 2024, 925,935 visitors came by air service and they were mainly from the U.S. West and U.S. East. Another 672 visitors came via one out-of-state cruise ship. In July 2023, 930,204 visitors arrived by air (-0.5%) and 4,935 visitors came via two out-of-state cruise ships (-86.4%). In July 2019, 995,210 visitors arrived by air (-7.0%) and no out-of-state cruise ship visited Hawai'i. The average length of stay by all visitors in July 2024 was 8.81 days, compared to 9.05 days (-2.6%) in July 2023 and 8.92 days (-1.2%) in July 2019.

Hawai'i Tourism Industry in the First Seven Months of 2024:

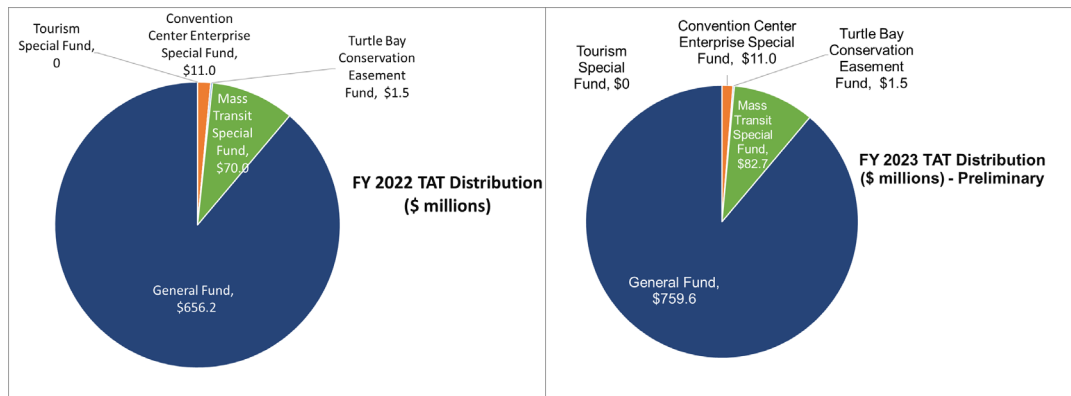
- **Total Visitor Spending: \$12.33 billion**, down from \$12.84 billion (-3.9%) in the first seven months of 2023, but higher than \$10.55 billion (+16.9%) in the first seven months of 2019.
- **State Tax Revenue (direct, indirect, and induced): \$1.43 billion**, compared to \$1.50 billion (-4.5%) in the first seven months of 2023 and \$1.23 billion (+16.1%) in the first seven months of 2019.
- **Visitor Arrivals: 5,706,863 visitors**, compared to 5,902,238 visitors (-3.3%) in the first seven months of 2023 and 6,166,392 visitors (-7.5%) in the first seven months of 2019.
- **Average Daily Census²: 236,398 total visitors**, compared to 251,781 visitors (-6.1%) in first seven months of 2023 and 255,290 visitors (-7.4%) in first seven months of 2019.
- **Total Air Service: 35,425 transpacific flights with 7,876,156 seats**, compared to 35,719 flights (-0.8%) with 7,828,555 seats (+0.6%) in the first seven months of 2023 and 36,410 flights (-2.7%) with 8,004,342 seats (-1.6%) in the first seven 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.
- For FY2024 (July 2023 - June 2024), the state collected \$782.3 million in TAT, compared \$865.3 million (-9.6%) collected in FY 2023 (July 2022 – June 2023), and \$564.3 million (+38.6%) collected in FY 2020 (July 2019 – June 2020) (Preliminary data from Dept of Taxation).

¹ 2024 visitor statistics are preliminary. 2019 - 2023 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 Calendar Year 2023:

- **Total Visitor Spending (Air, Cruise and Supplemental Business): \$20.87 billion**, up from \$19.80 billion (+5.4%) in 2022 and \$17.84 billion (+16.9%) in 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.42 billion**, compared to \$2.30 billion (+5.4%) in 2022 and \$2.08 billion (+16.2%) in 2019.
- **Visitor Arrivals: 9,657,607 visitors**, up 4.6 percent from 9,233,983 visitors in 2022. Total arrivals declined 7.0 percent when compared to 10,386,673 visitors in 2019.
- **Average Daily Census: 236,784 visitors**, compared to 233,534 visitors (+1.4%) in 2022 and 247,564 visitors (-4.4%) in 2019.
- **Jobs supported (direct, indirect, induced): 213,000.**
- **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.
- **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).
- **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

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.