

Tourism and Hawaii Economy

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DBEDT Research Division

This brief presents contributions of tourism to Hawaii economy, estimated using the economic relationships reflected in the 2017 State of Hawaii Input-Output (IO) model. In estimating the impacts using the IO model, “direct and indirect” impact measures the impact of visitor expenditure through all firms that contributed, directly or indirectly, to goods and services sold to visitors, while “induced” impact measures the additional impact generated through the increased household income and spending after the initial impacts. Contribution of tourism to Hawaii GDP is estimated using the latest GDP data from the U.S. Bureau of Economic Analysis (BEA) at the time of release and subject to change when the Hawaii GDP data are revised.

Table 1. Total visitor-related expenditure (\$M), 2019-2024 ¹

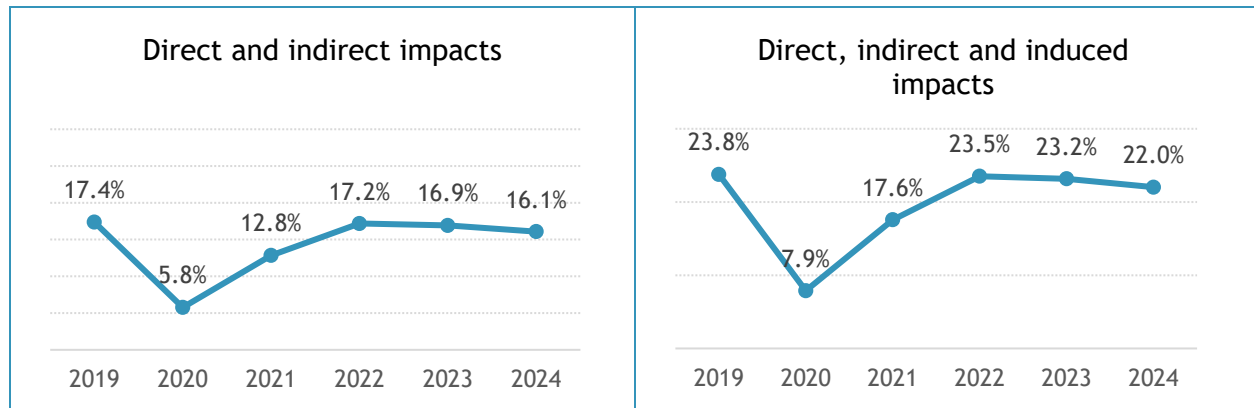
2019	2020	2021	2022	2023	2024
20,460	6,174	15,199	22,569	23,894	23,910

¹ Besides expenditure by visitors by air and cruise ship, it includes supplemental business expenditure and other estimated spending in Hawaii by overseas airlines and cruise lines.

Table 2. Impacts of total visitor-related expenditure on Hawaii economy, 2024

	Output (\$M)	GDP (\$M)	Tax (\$M)	Labor Income (\$M)	Total Jobs	W&S Jobs
Direct and indirect impact	33,010	18,920	2,195	10,639	170,328	134,812
Direct, indirect & induced impact	44,700	25,903	2,769	14,309	227,157	177,066

Figure 1. Contribution of tourism to Hawaii GDP, 2019-2024 ¹



¹ The percentages were calculated using the 2019-2024 GDP data for the State released in September 2025

Table 3. Contribution of tourism to Hawaii GDP, statewide and by county: Type 1 impacts

Type1: Direct and Indirect Impacts

-Contribution to the area's GDP(\$M) and Percentage of the area's total GDP-

Year	Statewide	Honolulu	Maui	Kauai	Hawaii
2019	16,189 (17.4%)	10,080 (14.6%)	3,179 (29.1%)	1,250 (28.6%)	1,680 (18.4%)
2020	4,886 (5.8%)	2,913 (4.6%)	994 (11.0%)	371 (9.6%)	607 (7.5%)
2021	12,027 (12.8%)	7,283 (10.5%)	2,501 (23.8%)	923 (21.9%)	1,319 (14.0%)
2022	17,858 (17.2%)	10,899 (14.2%)	3,578 (30.0%)	1,439 (29.2%)	1,942 (18.5%)
2023	18,907 (16.9%)	11,378 (13.8%)	3,583 (28.8%)	1,786 (33.6%)	2,160 (18.9%)
2024	18,920 (16.1%)	11,447 (13.1%)	3,326 (26.0%)	1,847 (33.3%)	2,300 (18.9%)

¹The percentages were calculated using the 2019-2024 GDP data for the State, released in September 2025, and for the Counties, released in February 2026

Table 4. Contribution of tourism to Hawaii GDP, statewide and by county: Type 2 impacts

Type2: Direct, Indirect, and Induced Impacts

-Contribution to the area's GDP(\$M) and Percentage of the area's total GDP-

Year	Statewide	Honolulu	Maui	Kauai	Hawaii
2019	22,165 (23.8%)	14,370 (20.9%)	4,070 (37.3%)	1,549 (35.4%)	2,175 (23.9%)
2020	6,689 (7.9%)	4,181 (6.5%)	1,271 (14.1%)	460 (11.9%)	777 (9.7%)
2021	16,466 (17.6%)	10,428 (15.0%)	3,193 (30.4%)	1,144 (27.1%)	1,701 (18.0%)
2022	24,449 (23.5%)	15,585 (20.3%)	4,577 (38.4%)	1,781 (36.2%)	2,506 (23.9%)
2023	25,886 (23.2%)	16,309 (19.8%)	4,597 (37.0%)	2,200 (41.4%)	2,780 (24.3%)
2024	25.903 (22.0%)	16.394 (18.8%)	4.285 (33.4%)	2.275 (41.0%)	2.949 (24.2%)

¹The percentages were calculated using the 2019-2024 GDP data for the State, released in September 2025, and for the Counties, released in February 2026

Table 5. Direct and indirect contribution of tourism to Hawaii economy by sector, 2024

Sector	Output (\$M)	GDP (\$M)	Tax (\$M)	Labor Income (\$M)	Total Jobs	W&S Jobs
Total	33,009.9	18,919.7	2,195.0	10,638.7	170,328	134,812
Accommodation	8,857.7	4,192.2	935.4	2,273.0	25,722	24,656
Transportation	4,987.0	2,982.3	145.8	1,333.0	17,070	13,262
Real estate and rentals	3,817.1	2,678.0	195.1	468.4	8,387	3,257
Retail trade	3,211.6	2,109.3	209.7	1,187.2	27,001	21,401
Eating and drinking	2,878.7	1,362.2	188.7	1,088.3	26,377	24,822
Business services	2,181.5	1,291.0	160.6	1,125.8	17,805	14,312
Professional services	867.7	529.8	65.6	465.5	5,908	2,990
State and local gov't	806.0	664.3	28.8	580.8	6,009	6,009
Arts and entertainment	804.3	655.6	56.5	446.2	13,580	7,400
Mining and construction	696.7	348.4	48.2	294.6	2,679	2,036
Utilities	583.8	365.1	23.0	114.0	687	625
Wholesale trade	537.8	308.8	12.9	161.3	1,774	1,478
Information	445.9	203.2	18.5	86.6	883	713
Other manufacturing	409.7	98.8	4.4	45.8	670	444
Finance and insurance	400.3	183.4	18.3	103.5	1,480	838
Other services	384.4	174.0	21.8	185.9	4,318	2,439
Federal government	378.5	347.5	17.2	310.9	2,520	2,520
Educational services	253.3	211.2	21.1	180.8	4,136	3,260
Health services	237.0	126.5	17.6	116.8	1,296	1,085
Food processing	195.1	50.1	3.7	38.1	818	737
Agriculture	75.9	38.2	2.0	32.2	1,208	529

Figure 2. Hawaii GDP by sector, **reclassified with tourism**, 2024

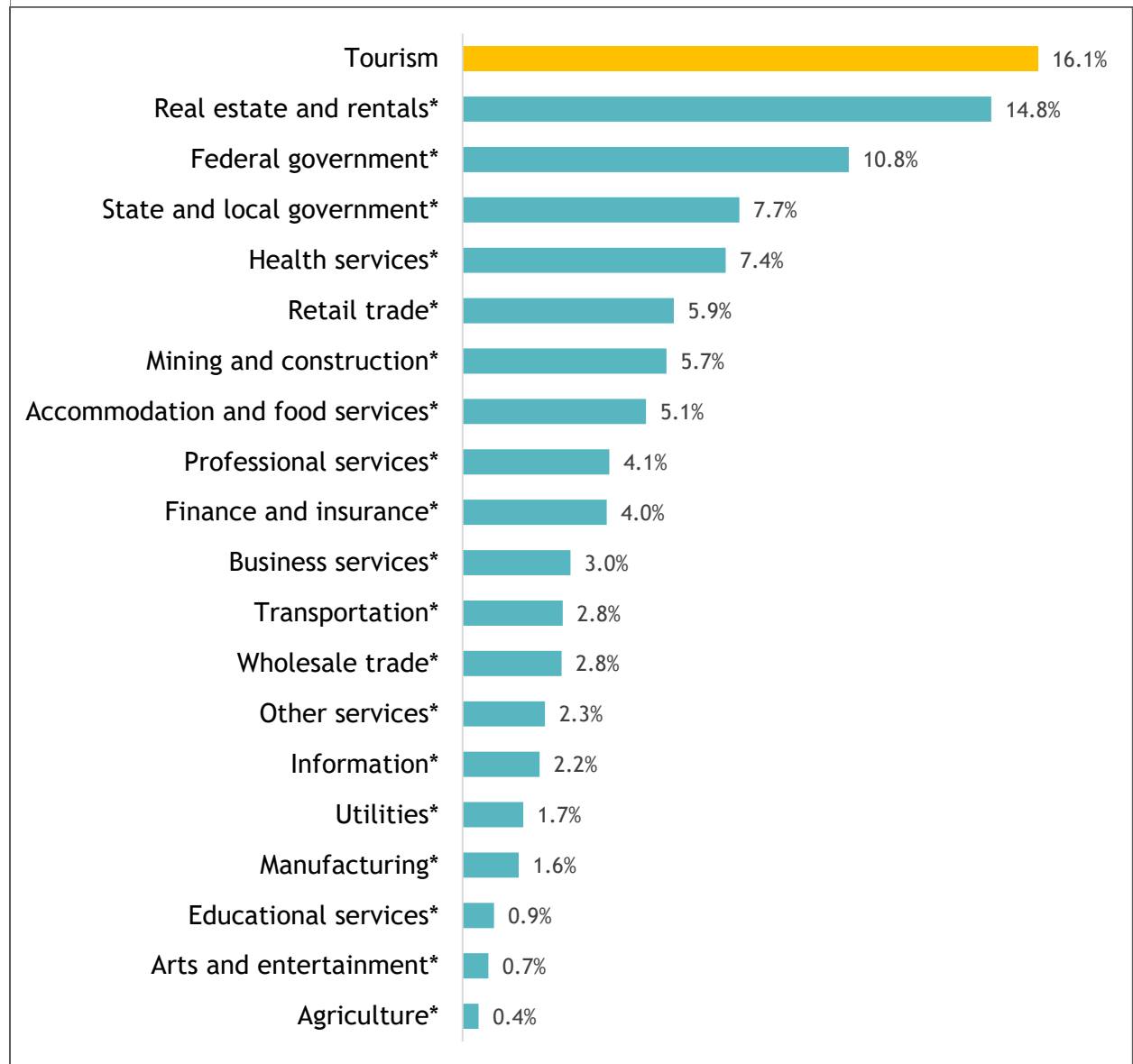
Methodology

Tourism is not defined in the standard industry classifications. To estimate the role of tourism in Hawaii GDP, GDP of tourism was estimated as follows and the original sectors were redefined to exclude the portion contributed by tourism.

Step 1: estimate contribution of tourism to each sector’s GDP using the 2017 Hawaii Input-Output model.

Step 2: estimate GDP of tourism sector as the sum of each sector’s GDP generated by tourism

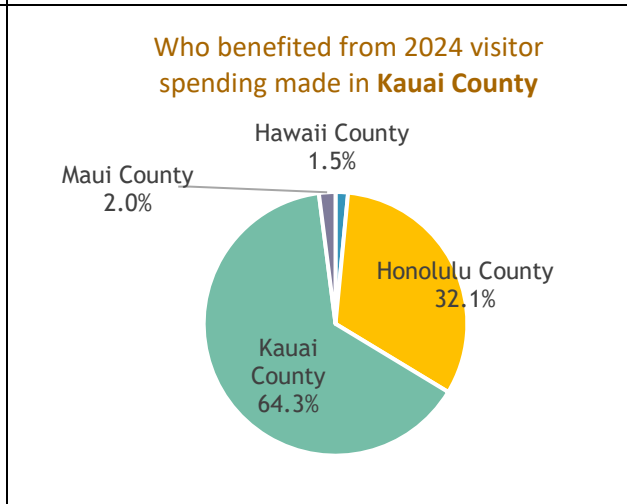
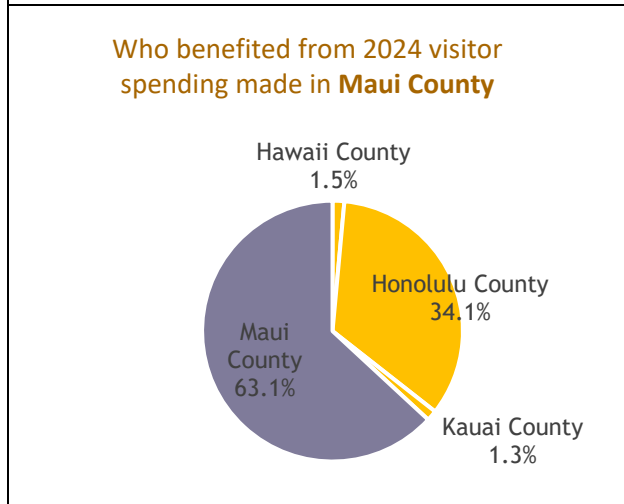
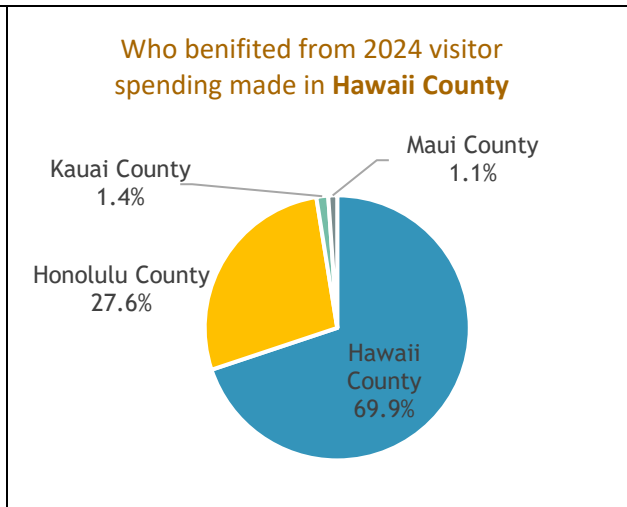
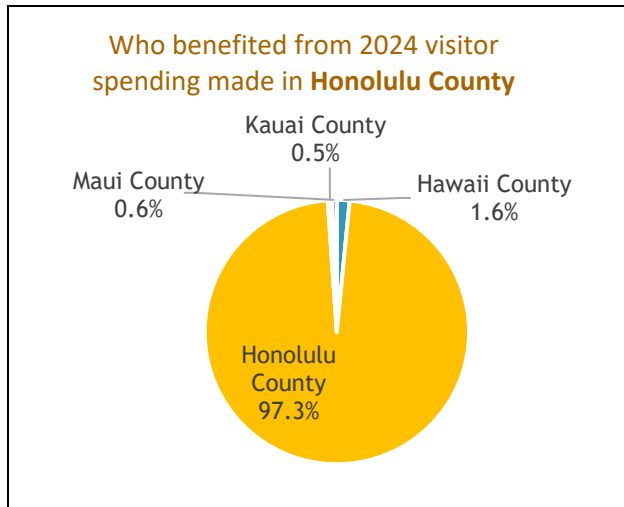
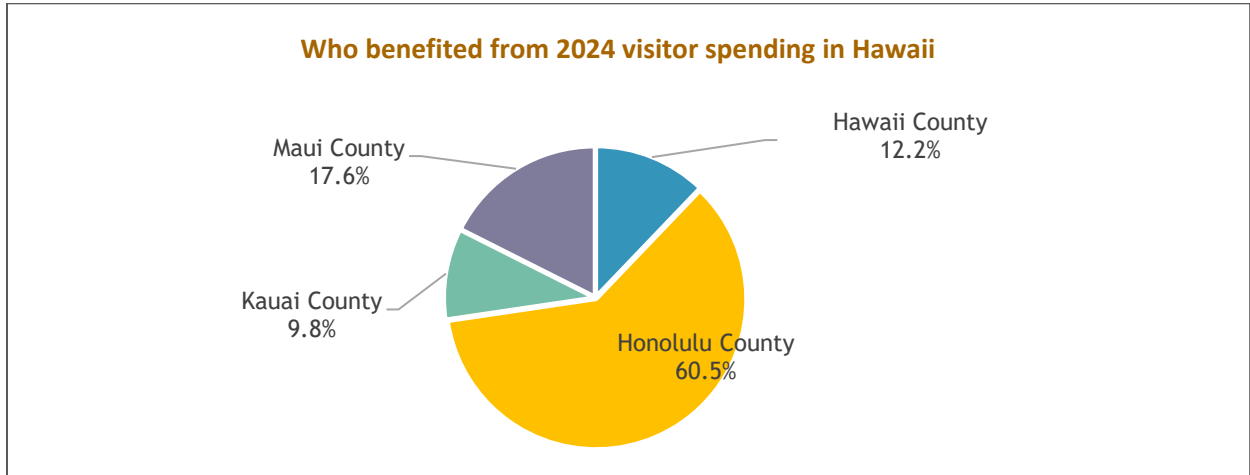
Step 3: re-estimate GDP of other sectors without the portion contributed by tourism



* non-tourism portion only (GDP generated by tourism was subtracted from the sector’s original GDP measure)

Figure 3. GDP contribution of visitor spending by counties benefited

- Estimated using the inter-county and inter-industry relations reflected in the 2017 Hawaii inter-county IO table by DBEDT.
- Statewide visitor spending was allocated to each county according to the actual county spending occurred in 2024



Estimated impacts of \$1 billion visitor spending in 2024

Table A-1. Estimated impacts of \$1 billion visitor spending in 2024 on Hawaii economy
(Direct and indirect impacts)

Sector	Output (\$M)	GDP (\$M)	Tax (\$M)	Labor Income (\$M)	Total Jobs	W&S Jobs
Total	1,380.6	791.3	91.8	444.9	7,124	5,638
Accommodation	370.5	175.3	39.1	95.1	1,076	1,031
Transportation	208.6	124.7	6.1	55.8	714	555
Real estate and rentals	159.6	112.0	8.2	19.6	351	136
Retail trade	134.3	88.2	8.8	49.7	1,129	895
Eating and drinking	120.4	57.0	7.9	45.5	1,103	1,038
Business services	91.2	54.0	6.7	47.1	745	599
Professional services	36.3	22.2	2.7	19.5	247	125
State and local gov't	33.7	27.8	1.2	24.3	251	251
Arts and entertainment	33.6	27.4	2.4	18.7	568	309
Mining and construction	29.1	14.6	2.0	12.3	112	85
Utilities	24.4	15.3	1.0	4.8	29	26
Wholesale trade	22.5	12.9	0.5	6.7	74	62
Information	18.7	8.5	0.8	3.6	37	30
Other manufacturing	17.1	4.1	0.2	1.9	28	19
Finance and insurance	16.7	7.7	0.8	4.3	62	35
Other services	16.1	7.3	0.9	7.8	181	102
Federal government	15.8	14.5	0.7	13.0	105	105
Educational services	10.6	8.8	0.9	7.6	173	136
Health services	9.9	5.3	0.7	4.9	54	45
Food processing	8.2	2.1	0.2	1.6	34	31
Agriculture	3.2	1.6	0.1	1.3	51	22

Table A-2. Estimated impacts of \$1 billion visitor spending in 2024 on Hawaii economy
(Direct, indirect and induced impacts)

Sector	Output (\$M)	GDP (\$M)	Tax (\$M)	Labor Income (\$M)	Total Jobs	W&S Jobs
Total	1,869.5	1,083.3	115.8	598.5	9,500	7,406
Accommodation	386.8	183.0	40.8	99.2	1,123	1,077
Real estate and rentals	284.6	203.7	11.7	27.4	503	176
Transportation	228.1	135.9	6.8	61.5	810	617
Retail trade	166.0	109.0	10.8	61.4	1,396	1,106
Eating and drinking	144.0	68.1	9.4	54.4	1,319	1,241
Business services	112.7	68.2	8.4	59.4	945	757
Health services	76.4	41.7	5.4	38.5	485	416
Professional services	53.4	32.4	4.0	27.9	364	178
State and local gov't	45.9	37.8	1.6	33.1	342	342
Finance and insurance	45.7	21.9	2.3	12.1	176	97
Wholesale trade	42.7	24.5	1.0	12.8	141	117
Other services	42.1	18.2	2.1	20.0	395	241
Mining and construction	38.7	19.3	2.7	16.3	149	113
Information	37.9	17.5	1.5	7.5	75	62
Arts and entertainment	37.1	30.3	2.6	20.6	627	342
Utilities	35.9	22.6	1.4	7.0	43	39
Other manufacturing	33.4	7.8	0.3	3.4	47	32
Federal government	23.8	21.8	1.1	19.5	158	158
Educational services	15.9	13.3	1.3	11.4	260	205
Food processing	13.0	3.3	0.2	2.5	54	49
Agriculture	5.5	2.9	0.2	2.5	89	41