



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM

The Economic Impact of International Students in Hawai'i – Calendar Year 2023



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Department of Business, Economic Development & Tourism
Research and Economic Analysis Division

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This report was produced by the Research and Economic Analysis Division (READ) of the Department of Business, Economic Development & Tourism (DBEDT) in collaboration with the Study Educational Hawai'i Consortium. This report was authored by Joseph Roos, Ph.D. under the direction of the Economic Research Administrator Eugene Tian, Ph.D. and assistance by Mustafa Shirzad, Economist.

EXECUTIVE SUMMARY

The *2024 Hawai'i International Education Survey* (IES) collected data for the calendar year of 2023 regarding the number of international students, the program length, expenditure amounts, and the estimated contribution to the state's economy. This year's survey showed mixed results with an increase in short-term international students and a slight decrease in long-term international students. This report is an update of previous reports published in various years between 2009 and 2023.

42 institutions responded to the international student survey this year, with 8 indicating that they did not have any international students for calendar year 2023. The total number of students reported by the respondents was 8,311 students, with long-term programs at 3,437 students and short-term programs at 4,874 students. In 2023, long-term students were 6.4 percent below the previous year's figure of 3,666 students. On the other hand, short-term students that include English language programs exceeded the previous year by 21.3 percent.

For calendar year 2023, the direct spending of international students in the State of Hawai'i was an estimated \$188.0 million. This amount included tuition and fees plus living expenses. Based on this direct impact, the total economic impacts of international student expenditures for calendar year 2023 were as follows:

- \$370.4 million in economic output generated, including direct, indirect, and induced effects.
- \$26.1 million in state taxes generated.
- \$161.7 million in household income generated.
- 4,645 jobs supported by international student spending.

The average 2023 total spending per student was \$40,507 for long-term students and \$10,013 for short-term students, including living expenses, tuition, and fees.

Hawai'i's educational institutions hosted a diverse group of students from all over the globe. Japan remains the top country of origin for Hawai'i's international students comprising 28.3 percent of the total. Japan was followed by South Korea with 8.5 percent, the Philippines with 7.9 percent.

It is important to note that the economic impact estimates do not include contributions from educational travel to Hawai'i from foreign-based educational institutions that are not officially registered at a Hawai'i based educational institution. For example, school excursions and other types of education-related travel from foreign countries.

I. INTRODUCTION

This report is based on the annual *Hawai'i International Education Survey* (IES), which is a collaboration between the Study Hawai'i Educational Consortium and the State of Hawai'i's Department of Business, Economic Development, & Tourism (DBEDT). The survey provides an annual benchmark to estimate the economic impact and number of international students studying in Hawai'i and is sent to schools in Hawai'i that host international students. This year's report covers the calendar year of 2023, which includes the impacts of the COVID-19 pandemic.

As with previous surveys, the current 2024 IES was conducted online and requested Hawai'i's educational institutions to provide the following data:

- The number of international students enrolled in various programs during the 2023 calendar year.
- The length of academic programs for international students.
- The tuition and fees paid by international students.
- The cost-of-living expenditures incurred by international students.
- The country of origin for international students studying in Hawai'i.

The survey questionnaire is presented in Appendix I.

This report is divided into four sections; after the first section introduction, the second section examines the direct, indirect, and induced impacts of international student spending on Hawai'i's economy and the results of the 2024 IES. The third section analyzes the results of the 2024 IES, including student spending, financial aid, and countries of origin. This section also provides a summary of results from previous surveys. The fourth section covers summaries and conclusions.

II. 2024 ECONOMIC IMPACT ANALYSIS FOR CALENDAR YEAR 2023

The estimate of the economic impact of international students studying in the State of Hawai'i was calculated based on the results of the 2024 IES, conducted in the second quarter of 2024. Caution should be used when comparing the current survey results with previous survey results due to variation in the survey respondents and methodology.

Data Collection and Sources. The current survey was administered online. The sampling frame consisted of educational institutions located in Hawai'i and was identified by the U.S. Department of Homeland Security's (DHS) database called SEVIS (Student and Exchange Visitor Information System). The questions in the online survey are available in Appendix I and the list of the institutions the survey was sent to is in Appendix II.

The survey asked educational institutions to report the number of international students and the estimated expenses for tuition/fees and living expenses incurred by international students for calendar year 2023. The educational institutions were also asked the level and type of study programs for international students (e.g., middle and high school students, undergraduate students, non-degree seeking students, etc.).

Responses were received from 42 educational institutions in Hawai'i, for a response rate of 60.9 percent. Of the 42 institutions, 8 indicated that they did not have any international students for calendar year 2023. The institutions responding to the 2024 IES accounted for 8,311 international students for the 2023 calendar year, representing a majority of Hawai'i's international students.

Methodology. The analysis presents two different estimates:

- 1) **Direct Impact:** This is an estimate of the direct dollar amount spent in Hawai'i by international students including tuition, fees, and living expenses.
- 2) **Direct + Indirect + Induced Impact:** This is the direct impact plus the indirect and induced impacts, including the ripple effects of international student expenditures on output, household income, state tax revenue, and jobs.

If an international student is telecommuting from out-of-state, the amount paid for rent, food, and other living expenses does not contribute to the state's economic impact. Therefore, the living expense amount was reduced by the estimated percentage of students that telecommuted from out-of-state as indicated in the surveys.

Direct Economic Impact. The methodology to measure the direct impact of international students studying in Hawai'i was based on the reported data provided by each respective institution. The calculation aggregated the tuition/fees plus living expenses minus the financial assistance awarded for all the institutions that responded to the survey. Non-responses were not included in the total and, therefore, the estimates are on the conservative side. The formula for calculating the direct economic impact of international students studying in Hawai'i is:



Table 1 presents a summary account of the different types of international students in Hawai'i and the amount spent on tuition and fees plus living expenses. These categories show the direct economic impact of international student spending on the state's economy.

The long-term category included students enrolled full-time for at least one semester (spring, summer, or fall), and tuition and living expenses were calculated for each semester and summed to an annual total. In addition to university level, this category also included international students enrolled full-time at the middle and high school level. Long-term student numbers were calculated based on the highest enrollment semester of the calendar year. The number of long-term students was 3,437, which comprised about 41 percent of total international students reported in the survey results. These students generated \$139.2 million in direct spending, which accounted for 74 percent of the total international student spending.

The short-term category includes non-degree university students, training programs, camps, and visiting scholars. The number of short-term students was 4,874 or 59 percent of the total. These students generated \$48.8 million in direct spending, which comprised 26 percent of international student total spending for 2023.

Table 1: Direct Economic Impact of International Students in Hawai'i for Calendar Year 2023

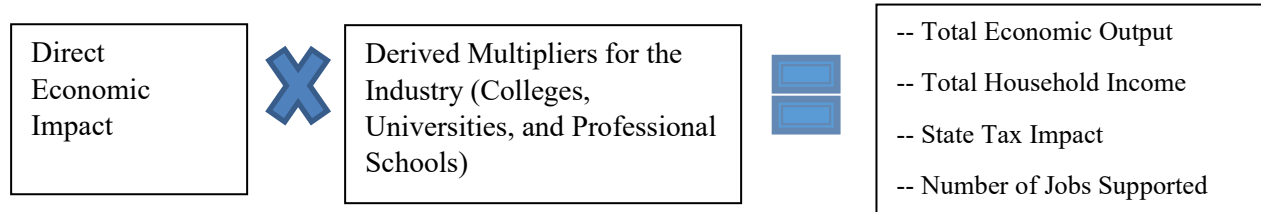
| Category | Number of Students | Spending by International Students on | | Total |
|--|--------------------|---------------------------------------|----------------------|----------------------|
| | | Tuition & Fees | Living Expenses* | |
| Long-Term Students | 3,437 | \$61,983,607 | \$77,249,854 | \$139,233,462 |
| Middle/high school students | 172 | \$3,895,597 | \$4,576,982 | \$8,472,579 |
| Degree-seeking undergraduate students | 2,630 | \$36,915,866 | \$60,679,920 | \$97,595,786 |
| Degree-seeking graduate students | 635 | \$21,172,144 | \$11,992,952 | \$33,165,096 |
| Short-Term Students | 4,874 | \$16,778,896 | \$32,024,261 | \$48,803,157 |
| Non-degree-seeking undergraduate students | 1,645 | \$11,328,240 | \$13,882,698 | \$25,210,938 |
| Non-degree-seeking graduate students | 29 | \$422,553 | \$376,692 | \$799,245 |
| Short-term training program students/professionals | 2,397 | \$4,130,378 | \$5,118,308 | \$9,248,687 |
| Students in summer/winter camps | 621 | \$897,725 | \$1,321,660 | \$2,219,385 |
| Visiting scholars/teachers | 182 | \$0 | \$11,324,903 | \$11,324,903 |
| Total | 8,311 | \$78,762,503 | \$109,274,115 | \$188,036,618 |

Source: DBEDT, 2024 IES

*Living expenses are calculated based on the estimated percentage of international students who were living in-state.

Total Economic Impacts. The total economic impacts for the state included the direct, indirect and induced impacts. The multipliers used for this calculation are from *The Hawai'i State Input-Output Study: 2017 Benchmark Report*.¹ Type II final demand multipliers were used, which include direct, indirect, and induced effects.

The following formula was used to calculate the total economic impact and the number of jobs supported by international students in Hawai'i for calendar year 2023:



¹ DBEDT, 2022. The State Input-Output Study: 2017 Benchmark Report. March.

Table 2 summarizes the economic impact of international students studying in Hawai'i by the following categories:

Total output generated is an estimate of the total dollar change in output for all industries in the state, resulting from the inflow of money spent by international students in Hawai'i. Based on this analysis, the total output generated by international student spending for calendar year 2023 was an estimated \$370.4 million.

Total household income generated is an estimate of household earnings that can be attributed to international students studying in the state. Hawai'i households earned an estimated total of \$161.7 million generated from international students for calendar year 2023.

Total state taxes generated is an estimate of state tax revenue that can be attributed to international students studying in Hawai'i. An estimated \$26.1 million in state taxes was generated by international student spending in the state for calendar year 2023.

The last line of the table shows the **total number of jobs supported** by international students studying in Hawai'i. Given an estimated direct economic impact of \$188.0 million for calendar year 2023, 4,645 jobs were supported. As noted above, these estimates are based on the Type II multiplier, which includes direct, indirect, and induced effects.

Table 2: Total Economic Impact of International Students in Hawai'i, 2023

| Direct Spending (from Table 1) | | \$188,036,618 |
|---|-----------------------------------|---------------------------|
| | Final Demand Multiplier (Type II) | Economic Impact (Type II) |
| Total Output Generated | 1.97 | \$370,432,137 |
| Total Household Income Generated | 0.86 | \$161,711,491 |
| Total State Taxes Generated | 0.139 | \$26,137,090 |
| Total Jobs Supported | 24.7 (per \$million) | 4,645 |

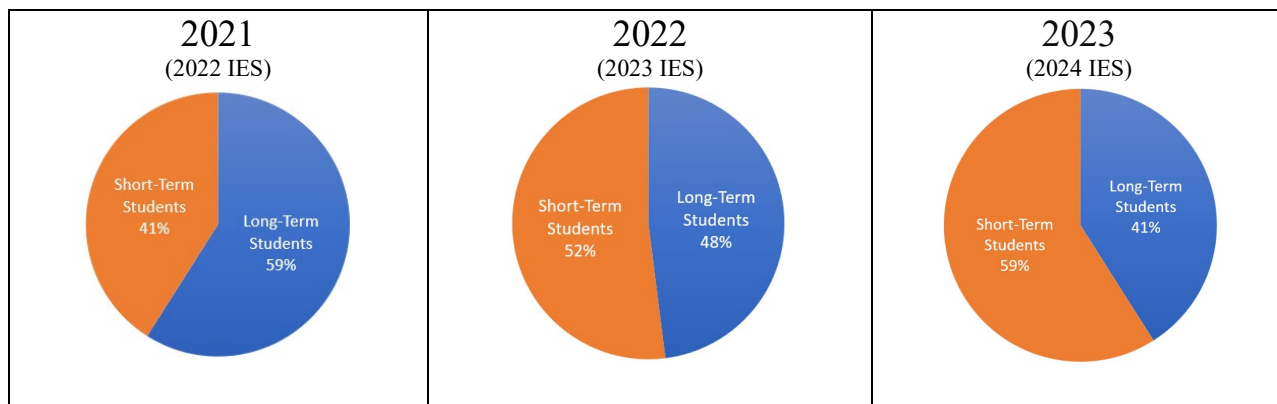
Source: DBEDT, 2023. Hawai'i State Input-Output Study: 2017 Benchmark Report. March.

III. 2024 INTERNATIONAL EDUCATION SURVEY RESULT COMPARISONS

Data Comparisons

Figure 1 below highlights the results of the 2024 IES by the program length and compares these with the two previous survey results. The results show a higher percentage of students enrolled in short-term programs compared with long-term programs, comprising 59 percent and 41 percent respectively. From 2022 the student ratios returned to the pre-pandemic pattern, with a majority of Hawai'i's international students enrolled in non-degree-short-term programs, composed mostly of English language schools. In 2021, long-term students exceeded short-term students because universities were able to pivot to online classes, thus retaining a majority of their international students. On the other hand, short-term programs such as English language schools, were less successful at pivoting to online classes during the pandemic and students were hesitant to enroll for in-person classes.

Figure 1. Categories of International Students in Hawai'i



Source: DBEDT: respective years of IES

From an economic development perspective, long-term students have a greater impact on the state's economy because they spend more on an average annual basis than short-term students. In addition to bringing in more revenue for educational institutions, long-term students have a stronger ripple effect as they pay rent, buy groceries, and spend on other items for a longer period-of-time than short-term students.

As shown in Table 3, the direct impact of long-term students on the local economy was \$139.2 million and the short-term student impact was \$48.8 million for calendar year 2023. While the dollar impact was less, short-term programs are an important part of Hawai'i's international education ecosystem, because they serve as a bridge for students to transition into long-term degree programs.

Spending per student. The overall average annual spending per student for calendar year 2023 was \$22,624, including both long-term and short-term students. As shown in table 3, the average annual spending for long-term students was \$40,507 (\$22.5 thousand for living expenses and \$18.0 thousand for tuition/fees) and short-term students was \$10,013 (\$6.6 thousand for living expenses and \$3.4 thousand for tuition/fees).

Table 3. Spending by International Students in Hawai'i by Program Length for 2023 Calendar Year

| Category | Long-Term Programs | Short-Term Programs | All Programs |
|---|--------------------|---------------------|--------------|
| Number of Students | 3,437 | 4,874 | 8,311 |
| Total Spending (\$) | \$139,223,462 | \$48,803,156 | 188,026,618 |
| Living Expenses (\$)* | \$77,249,854 | \$32,024,261 | 109,274,115 |
| Tuition and Fees (\$) | \$61,983,607 | \$16,778,896 | 78,762,503 |
| Average Annual Spending Per Student (\$) | \$40,507 | \$10,013 | \$22,624 |

Source: DBEDT, 2024 IES

*Living expenses are calculated based on the estimated percentage of international students who were living in-state.

Table 4 below shows the direct impact (total spending by international students) and total economic impacts on the economy of the State of Hawai'i for the current survey and the two previous surveys of the IES. The direct spending of international students was lower in 2021 due to the pandemic. As the state emerged from the pandemic in 2022, international students returned, and their related spending increased by 79 percent over the previous year. In 2023, the direct spending was approximately the same, with a 0.7 percent decrease. While the number of short-term students increased, the number of long-term students decreased and, due to the higher average spending per student, this decreased the total of direct spending slightly.

Table 4. Summary of Economic Impacts: 2021, 2022, and 2023

| | 2021 (2022 IES) | 2022 (2023 IES) | 2023 (2024 IES) |
|---|----------------------|----------------------|----------------------|
| Total Direct Spending | \$105,839,154 | \$189,422,688 | 188,036,618 |
| Output Multiplier | 1.97 | 1.97 | 1.97 |
| Earnings Multiplier | 0.86 | 0.86 | 0.86 |
| State Tax Multiplier | 0.139 | 0.139 | 0.139 |
| Employment Multiplier (jobs per \$m) | 25.9 | 25.3 | 24.7 |
| Total Output Generated | \$208,503,133 | \$373,162,695 | \$370,432,137 |
| Total Income Generated | \$91,021,672 | \$162,903,512 | \$161,711,491 |
| Total State Taxes Generated | \$14,711,642 | \$26,329,754 | \$26,137,909 |
| Total Jobs Supported | 2,741 | 4,792 | 4,645 |

Source: DBEDT, 2022. Hawai'i State Input-Output Study: 2017 Benchmark Report. March.

The survey also asked the percentage of students that attended remotely from outside of the state in 2023. For long-term students, the semester average for summer semester was 0.65 percent and close to zero for fall and spring semesters. For short-term students, the average of students attending classes remotely from outside the state was 0.85 percent, and a majority of these were from one English language school. It is important to note that these figures only reflect remote students that were outside of the state; remote students that were in-state attending classes were not included.

Financial Aid to International Students and Net Spending per Student. Financial aid and other resources are used as an incentive to attract international students. The total financial aid estimate for international students in 2023 was \$7,991,946, which was 13.1 percent above the \$7,063,452 amount for the previous year. It is important to note that these are scholarships and grants offered by the institutions and do not include RA/TA assistance. Generally, international students are eligible only for merit aid provided by the host institutions. However, students who are U.S. permanent residents are also eligible for federal financial aid, in addition to any available institutional aid. At most institutions, financial aid is only provided for long-term students, those who are taking classes for credit and are working towards completion of requirements for a degree.

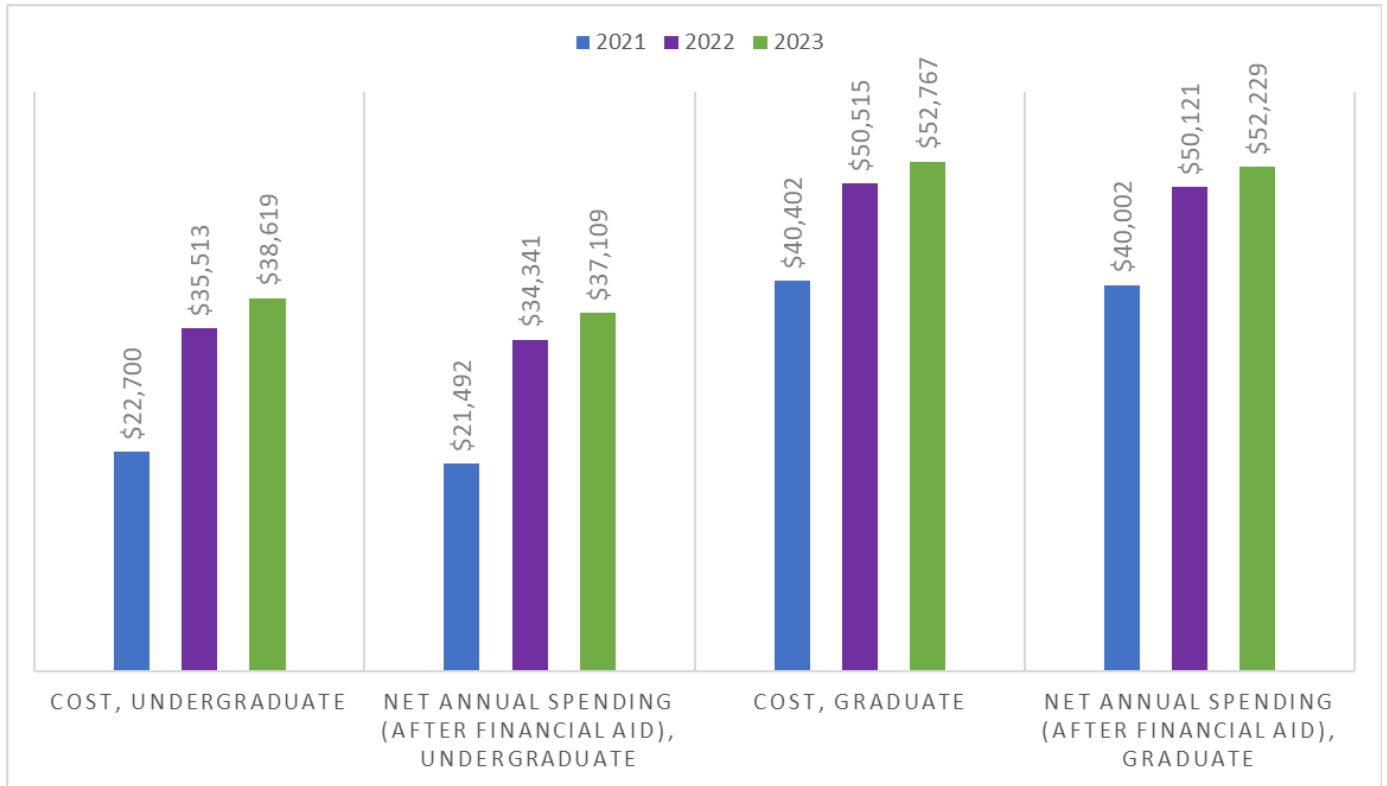
At the *undergraduate level* for calendar year 2023, the average annual expense for tuition and cost of living for a degree-seeking international student in Hawai'i was \$37,109. This amount was after the average annual financial assistance was subtracted, which reduced the total cost per student by approximately \$1,510 annually. The average tuition amount included community colleges, which generally had lower tuition than the four-year universities.

At the *graduate level* for calendar year 2023, the average annual expense for tuition and cost of living for a degree-seeking graduate in Hawai'i was \$52,229. This amount was after the financial assistance was

subtracted, which reduced the total cost per student by approximately \$538 annually (this does not include RA/TA assistance).

In addition to promoting Hawai'i as an educational destination, increasing financial aid for international students could help the state attract and retain quality students from all over the globe.

Figure 2. Impact of Financial Aid for International University Students



Source: DBEDT: respective years of IES

Countries of Origin for Hawai'i's International Students

Table 5 lists the top countries of origin for Hawai'i's international students in 2023. Japan remained the top country of origin in 2023, comprising 28.3 percent of the total. Japan was followed by South Korea with 8.5 percent, the Philippines with 7.9 percent, China (including Hong Kong and Macao) with 6.9 percent, and Switzerland with 6.6 percent.

Table 5. Places of Origin of International Students in Hawai'i in 2023

| Rank | Country/Place | No. of Students | % of Total |
|------|------------------------|-----------------|------------|
| 1 | Japan | 1,742 | 28.3% |
| 2 | South Korea | 520 | 8.5% |
| 3 | Philippines | 487 | 7.9% |
| 4 | China (PRC, HK, Macao) | 427 | 6.9% |
| 5 | Switzerland | 405 | 6.6% |
| 6 | Germany | 239 | 3.9% |
| 7 | Canada | 206 | 3.3% |
| 8 | Taiwan | 159 | 2.6% |
| 9 | Tonga | 151 | 2.5% |
| 10 | Norway | 141 | 2.3% |
| 11 | Fiji | 93 | 1.5% |
| 12 | India | 83 | 1.3% |
| 13 | Brazil | 73 | 1.2% |
| *14 | Indonesia | 71 | 1.2% |
| *14 | Mongolia | 71 | 1.2% |
| 15 | Thailand | 69 | 1.1% |
| 16 | France | 68 | 1.1% |
| 17 | Vietnam | 58 | 0.9% |
| **18 | Australia | 55 | 0.9% |
| **18 | French Polynesia | 55 | 0.9% |
| 19 | Western Samoa | 54 | 0.9% |
| 20 | Denmark | 47 | 0.8% |
| 21 | New Zealand | 46 | 0.7% |
| 22 | Malaysia | 45 | 0.7% |
| 23 | Papa New Guinea | 44 | 0.7% |
| 24 | Cambodia | 38 | 0.6% |
| 25 | Spain | 37 | 0.6% |

*Indonesia and Mongolia have equal values.

**Australia and French Polynesia have equal values.

Source: DBEDT, 2024 IES

Compared to last year's rankings, the number one and number two rankings remained the same, with Japan in the top position followed by South Korea. The Philippines moved up to the third position this year from the fifth position last year. China remained in the fourth position; Switzerland fell two positions, from the third position last year to the fifth position this year; and Norway fell three positions from the seventh position last year to the tenth position this year.

According to the Institute of International Education data, the top five countries of origin for international students studying in the U.S. during the 2022/23 academic year were China (27.4%), India (25.4%), South Korea (4.1%), Canada (2.6%), and Vietnam (2.1%).² The large share difference between Hawai'i and the U.S. for China and India may offer opportunities for Hawai'i to attract more students from these countries.

IV. CONCLUSIONS

The data presented in this report were the results of the *2024 Hawai'i International Education Survey*. DBEDT received responses from 42 of Hawai'i's educational institutions with international students for a response rate of 60.9 percent. The total direct economic impact of international students for the 2023 calendar year was an estimated \$188.0 million, including tuition and fees plus living expenses. Of this, \$139.2 million was from long-term programs and \$48.8 million was from short-term programs. These estimates do not include contributions from foreign schools to Hawai'i, such as school excursions and other education-related travel. As of this writing, comprehensive data was not available, and the effects of education-related travel is an area for future research.

In addition to the direct impact, other economic benefits of international students for the 2023 calendar year were:

- \$370.4 million in economic output generated, including direct, indirect, and induced effects.
- \$26.1 million in state taxes generated.
- \$161.7 million in household income generated.
- 4,645 jobs supported by international student spending.

The 2023 average annual spending per student for all programs was \$22,624, including tuition and fees plus living expenses. For each respective category, average annual spending for long-term students was \$40,507 and \$10,013 for short-term students.

The survey results showed an increase in the total number of international students for calendar year 2023 over 2022, with 8,311 students and 7,682 students respectively. However, while the short-term students increased from 4,016 in 2022 to 4,874 in 2023, long-term students decreased from 3,666 to 3,437. Due to the higher average spending for long-term students, this resulted in a slight decrease in the total direct spending for international students from \$189.4 in 2022 million to \$188.0 million in 2023.

In summary, Hawai'i's international students are an important part of Hawai'i's economy, and it is expected their numbers will increase and further contribute to Hawai'i's economy.

² Institute of International Education OpenDoors. 2024. International Student Data. <https://opendoorsdata.org/data/international-students/>

APPENDIX I: 2023 Hawai'i International Education Survey
(actual survey instrument was online)

CONTACT INFORMATION

* 1. Please fill in your contact information

Name

Institution

Address

Address 2

City/Town

ZIP/Postal Code

Email Address

Phone Number

2. Did you have any international students during the 2023 calendar year?

Yes

No

(if respond "no" survey ends)

ENROLLMENT

2. Please enter the international student enrollment numbers by category for **Spring 2023**

Middle/High school students

Degree-seeking undergraduate students

Non-degree-seeking undergraduate students

Degree-seeking graduate students

Non-degree-seeking graduate students

3. If any students took online classes from out-of-state during **Spring 2023**, please enter the estimated percentages for each respective category below:

% of middle/high school students

% of degree-seeking undergraduate

% of non-degree-seeking undergraduate

% of degree-seeking graduate students

% of non-degree-seeking graduate students

4. Please enter the international student enrollment numbers by category for **Summer 2023**

Middle/High school students

Degree-seeking undergraduate students

Non-degree-seeking undergraduate students

Degree-seeking graduate students

Non-degree-seeking graduate students

5. If any students took online classes from out-of-state during **Summer 2023**, please enter the estimated percentages for each respective category below:

% of middle/high school students

% of degree-seeking undergraduate

% of non-degree-seeking undergraduate

% of degree-seeking graduate students

% of non-degree-seeking graduate students

6. Please enter the international student enrollment numbers by category for **Fall 2023**

Middle/High school students

Degree-seeking undergraduate students

Non-degree-seeking undergraduate students

Degree-seeking graduate students

Non-degree-seeking graduate students

7. If any students took online classes from out-of-state during **Fall 2023**, please enter the estimated percentages for each respective category below:

% of middle/high school students

% of degree-seeking undergraduate

% of non-degree-seeking undergraduate

% of degree-seeking graduate students

% of non-degree-seeking graduate students

8. Please indicate the international student enrollment numbers for **the total calendar year of 2023** (combined spring, summer, fall) by each of the following categories. Please note these short-term categories are different from the previous questions (Q3 through Q8).

Students/professionals in short-term training programs

Summer/winter camps

Visiting scholars/teachers

9. If any students participated online from out-of-state, please enter the estimated percentages for each respective category below:

% of students/professionals in training programs

% in summer/winter camps

% visiting scholars/teachers

10. Please indicate the average program length in days for **calendar year 2023** for each of the following categories (if there were multiple programs, please report the average number of days for each respective program category). If you need to clarify your answers, you may do so in Question 21.

Students/professionals in short-term training programs

Summer/winter camps

Visiting scholars/teachers

11. Please indicate the number of family members accompanying international students/trainees (via invitation letters from your institution).

FINANCIAL SUMMARY FOR TUITION AND FEES

12. Please indicate the cost of tuition and fees per student for **Spring 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

| | |
|---|----------------------|
| Middle/High school students | <input type="text"/> |
| Degree-seeking undergraduate students | <input type="text"/> |
| Non-degree-seeking undergraduate students | <input type="text"/> |
| Degree-seeking graduate students | <input type="text"/> |
| Non-degree-seeking graduate students | <input type="text"/> |

13. Please indicate the cost of tuition and fees per student for **Summer 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

| | |
|---|----------------------|
| Middle/High school students | <input type="text"/> |
| Degree-seeking undergraduate students | <input type="text"/> |
| Non-degree-seeking undergraduate students | <input type="text"/> |
| Degree-seeking graduate students | <input type="text"/> |
| Non-degree-seeking graduate students | <input type="text"/> |

14. Please indicate the cost of tuition and fees per student for **Fall 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

Middle/High school students

Degree-seeking undergraduate students

Non-degree-seeking undergraduate students

Degree-seeking graduate students

Non-degree-seeking graduate students

15. Please indicate the cost of tuition and fees per student for **calendar year 2023** by the following categories of international students. Please specify time period (e.g. per day, per week, per month, per program, per year).

Students/professionals in short-term training programs

Summer/winter camps

Visiting scholars/teachers

FINANCIAL SUMMARY FOR COST OF LIVING

16. Please indicate the cost of living per student for **Spring 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

| | |
|---|----------------------|
| Middle/High school students | <input type="text"/> |
| Degree-seeking undergraduate students | <input type="text"/> |
| Non-degree-seeking undergraduate students | <input type="text"/> |
| Degree-seeking graduate students | <input type="text"/> |
| Non-degree-seeking graduate students | <input type="text"/> |

17. Please indicate the cost of living per student for **Summer 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

| | |
|---|----------------------|
| Middle/High school students | <input type="text"/> |
| Degree-seeking undergraduate students | <input type="text"/> |
| Non-degree-seeking undergraduate students | <input type="text"/> |
| Degree-seeking graduate students | <input type="text"/> |
| Non-degree-seeking graduate students | <input type="text"/> |

18. Please indicate the cost of living per student for **Fall 2023** by the following categories of international students. Please specify time period (e.g. per week, per month, per x-week term, per semester, per year).

Middle/High school students

Degree-seeking undergraduate students

Non-degree-seeking undergraduate students

Degree-seeking graduate students

Non-degree-seeking graduate students

19. Please indicate the cost of living per student for **calendar year 2023** by the following categories of international students. Please specify time period (e.g. per day, per week, per month, per program, per year).

Students/professionals in short-term training programs

Summer/winter camps

Visiting scholars/teachers

FINANCIAL ASSISTANCE

20. For **calendar year 2023** (January through December), please indicate the lump sum amount of financial assistance through tuition waivers, scholarships, and any other financial assistance to INTERNATIONAL students/scholars in U.S. dollars (i.e. add up all the financial support given to students in that category and report the amount).

| | |
|--|----------------------|
| Middle/High school students | <input type="text"/> |
| Degree-seeking undergraduate students | <input type="text"/> |
| Non-degree-seeking undergraduate students | <input type="text"/> |
| Degree-seeking graduate students | <input type="text"/> |
| Non-degree-seeking graduate students | <input type="text"/> |
| Students/professionals in short-term training programs | <input type="text"/> |
| Summer/winter camps | <input type="text"/> |
| Visiting scholars/teachers | <input type="text"/> |



PLACE OF ORIGIN FOR 2023

22. Please indicate the number of international students from each country during **Spring, Summer, and Fall for 2023.**

| | |
|------------------|----------------------|
| American Samoa | <input type="text"/> |
| Argentina | <input type="text"/> |
| Australia | <input type="text"/> |
| Belgium | <input type="text"/> |
| Brazil | <input type="text"/> |
| Cambodia | <input type="text"/> |
| Canada | <input type="text"/> |
| Chile | <input type="text"/> |
| China, PRC | <input type="text"/> |
| China, Hong Kong | <input type="text"/> |
| China, Macao | <input type="text"/> |
| Colombia | <input type="text"/> |
| Costa Rica | <input type="text"/> |
| Czech Republic | <input type="text"/> |
| Denmark | <input type="text"/> |
| Ecuador | <input type="text"/> |
| Egypt | <input type="text"/> |
| Fiji | <input type="text"/> |
| Finland | <input type="text"/> |
| France | <input type="text"/> |
| French Polynesia | <input type="text"/> |
| Germany | <input type="text"/> |

| | |
|------------------|----------------------|
| Greece | <input type="text"/> |
| Hungary | <input type="text"/> |
| India | <input type="text"/> |
| Indonesia | <input type="text"/> |
| Iraq | <input type="text"/> |
| Ireland | <input type="text"/> |
| Israel | <input type="text"/> |
| Italy | <input type="text"/> |
| Japan | <input type="text"/> |
| Jordan | <input type="text"/> |
| Kazakhstan | <input type="text"/> |
| Kenya | <input type="text"/> |
| Kiribati | <input type="text"/> |
| Korea, South | <input type="text"/> |
| Laos | <input type="text"/> |
| Lebanon | <input type="text"/> |
| Lithuania | <input type="text"/> |
| Malaysia | <input type="text"/> |
| Marshall Islands | <input type="text"/> |
| Mexico | <input type="text"/> |
| Micronesia | <input type="text"/> |
| Mongolia | <input type="text"/> |
| Morocco | <input type="text"/> |
| Nepal | <input type="text"/> |
| Netherlands | <input type="text"/> |
| New Zealand | <input type="text"/> |
| Nicaragua | <input type="text"/> |
| Norway | <input type="text"/> |

| | |
|-----------------|----------------------|
| Pakistan | <input type="text"/> |
| Palau | <input type="text"/> |
| Peru | <input type="text"/> |
| Philippines | <input type="text"/> |
| Poland | <input type="text"/> |
| Portugal | <input type="text"/> |
| Romania | <input type="text"/> |
| Russia | <input type="text"/> |
| Saudi Arabia | <input type="text"/> |
| Singapore | <input type="text"/> |
| Slovakia | <input type="text"/> |
| South Africa | <input type="text"/> |
| Spain | <input type="text"/> |
| Sri Lanka | <input type="text"/> |
| Sweden | <input type="text"/> |
| Switzerland | <input type="text"/> |
| Taiwan | <input type="text"/> |
| Thailand | <input type="text"/> |
| Tonga | <input type="text"/> |
| Turkey | <input type="text"/> |
| Ukraine | <input type="text"/> |
| United Kingdom | <input type="text"/> |
| Uruguay | <input type="text"/> |
| Venezuela | <input type="text"/> |
| Vietnam | <input type="text"/> |
| Western Samoa | <input type="text"/> |
| Other (specify) | <input type="text"/> |
| Other (specify) | <input type="text"/> |

APPENDIX II: List of the Educational Institutions Surveyed (*calendar year 2023 data*).

Table All.1: The list is based on the U.S. Department of Homeland Security’s (DHS) database called SEVIS (Student and Exchange Visitor Information System):

| Flight Schools | | |
|--|--------------------------|--|
| Mauna Loa Helicopters | Flight School | 73-310 Uu Street Kailua-Kona, HI, 96740 |
| Language Schools | | |
| Academia Language School | Language School | 1600 Kapiolani Blvd. Suite 1215 Honolulu, HI, 96814 |
| EF International Language Schools, Inc. | Language Schools | EF International Language Schools, Inc. Honolulu, HI, 96815 |
| Institute of Intensive English, Ltd. | Language School | 2155 Kalakaua Avenue, Suite 700 Honolulu, HI, 96815 |
| Intercultural Communications College | Language Schools | 810 Richards Street Honolulu, HI, 96813 |
| Hawai'i English Language Program | Language School | 1395 Lower Campus Road, MC 13-1 Honolulu, HI, 96822 |
| Global Village Hawai'i | Language Schools | 1440 Kapiolani Blvd. Honolulu, HI, 96814 |
| Maui Language Institute | Language School | 310 W Kaahumanu Avenue Kahului, HI 96732 |
| Massage/Beauty/Cosmetology/Alternative Medicine | | |
| Aisen Shiatsu Chiryō Doin | Massage School | 1314 South King Street, Suite 601, Honolulu, HI 96814 |
| Hawai'i Massage Academy | Massage School | 1750 Kalakaua Avenue Suite 3004 Honolulu, HI, 96826 |
| Institute of Clinical Acupuncture and Oriental Medicine | Alternative Medicine | 100 N Beretania Street, Suite 203 B Honolulu, HI, 96817 |
| Makana Esthetics Wellness Academy | Beauty School | 560 N Nimitz Hwy Ste 125D Honolulu, HI, 96817 |
| Primary/Secondary Schools | | |
| American Renaissance Academy | Primary/Secondary School | 300 Franklin Ave Kapolei, HI 96707 |
| Asia Pacific International School | Secondary School | 54-230 Kamehameha Hwy Hauula, HI, 96717 |
| Haleakala Waldorf School | Secondary School | 4160 Lower Kula Road Kula, HI, 96790 |
| Hanahauoli School | Primary School | 1922 Makiki St, Honolulu, HI 96822 |
| Hanalani Schools | Secondary School | Admissions Office Mililani, HI, 96789 |

| | | |
|--|--------------------------|--|
| Hawai'i Baptist Academy | Secondary School | 2429 Pali Highway Honolulu, HI, 96817 |
| Hawai'i Preparatory Academy | Primary/Secondary School | 65-1692 Kohala Mountain Road Kamuela, HI, 96743 |
| Hawaiian Mission Academy | Primary/Secondary School | 1415 Makiki Street Honolulu, HI, 96814 |
| Hongwanji Mission School | Secondary School | 1728 Pali Highway Honolulu, HI, 96813 |
| Honolulu Waldorf School | Primary/Secondary School | 350 Ulua Street Honolulu, HI, 96821 |
| Iolani School | Secondary School | 563 Kamoku Street Honolulu, HI, 96826 |
| Island Pacific Academy – Upper School | Secondary School | 909 Haumea Street Kapolei, HI, 96707 |
| Kaimuki Christian School | Secondary School | 1117 Koko Head Avenue Honolulu, HI |
| Kohala High School | Secondary School | 54-3611 Akoni Pule Hwy, Kapaa, HI 96755 |
| La Pietra Hawai'i School for Girls | Secondary School | 2933 Poni Moi Road Honolulu, HI, 96815 |
| Makua Lani Christian Academy | Secondary School | 74-4966 Kealakaa Street Kailua-Kona, HI, 96740 |
| Maryknoll School | Secondary School | 1526 Alexander Street Honolulu, HI, 96822 |
| Maui Preparatory Academy | Secondary School | 4910 Honoapiilani Highway Lahaina, HI, 96761 |
| Le Jardin Academy | Secondary School | 917 Kalaniana'ole Highway Kailua, HI, 96734 |
| Parker School | Primary/Secondary School | 65-1224 Lindsey Rd Kamuela, HI 96743 |
| Punahou School | Primary/Secondary School | 1601 Punahou Street Honolulu, HI, 96822 |
| Sacred Hearts Academy | Secondary School | 3253 Waialae Avenue Honolulu, HI, 96816 |
| Saint Anthony | Primary/Secondary School | 148 Makawao Street Kailua, Hawai'i 96734 |
| Saint Louis School | Secondary School | 3142 Waialae Avenue Honolulu, HI, 96816 |
| Seabury Hall | Secondary School | 480 Olinda Road Makawao, HI, 96768 |
| St. Joseph School of Hilo | Secondary School | 1000 Ululani Street Hilo, HI, 96720 |
| The St. Andrew's Schools | Secondary School | 224 Queen Emma Square Honolulu, HI, 96813 |
| Trinity Christian School | Secondary School | 1110 A Kailua Road Kailua, HI, 96734 |
| Mid-Pacific Institute | Primary/Secondary School | 2445 Kaala Street Honolulu, HI, 96822 |

| Post-secondary Institutions – University/College | | |
|--|----------------------|--|
| Brigham Young University-Hawai'i | University/College | 55-220 Kulanui Street Laie, HI, 96762 |
| Central Pacific College | University/College | 1833 Kalakaua Avenue Suite 510 Honolulu, HI, 96815 |
| Chaminade University of Honolulu | University/College | 3140 Waiialae Avenue Honolulu, HI, 96816 |
| Hawai'i Pacific University | University/College | 1164 Bishop Street Honolulu, HI, 96813 |
| Hawai'i Tokai International College | University/College | 91-971 Farrington Highway Kapolei, HI, 96707 |
| International Mid Pac College | University/College | 1311 Kapiolani Blvd. 200-5 Honolulu, HI, 96814 |
| University of the Nations, Kona | University/College | 75-5851 Kuakini Highway Kailua-Kona, HI, 96740 |
| Wayland Baptist University – HI | University/College | 95-1091 Ainamakua Drive Mililani, HI, 96789 |
| University of Hawai'i System | | |
| Hawai'i Community College | University/College | 200 W. Kawili Street Hilo, HI, 96720 |
| UH Center at West Hawai'i | University/College | 81-964 Halekii Street Kealahou, HI, 96750 |
| Kapiolani Community College | University/College | 4303 Diamond Head Road Honolulu, HI, 96816 |
| Kauai Community College | University/College | Kauai Community College - University of Hawai'i Lihue, HI, 96766 |
| Leeward Community College | University/College | 96-045 Ala Ike Pearl City, HI, 96782 |
| Honolulu Community College | University/College | 874 Dillingham Blvd. Honolulu, HI, 96817 |
| University of Hawai'i at Hilo | University/College | University of Hawai'i at Hilo Hilo, HI, 96720 |
| University of Hawai'i at Manoa | University/College | University of Hawai'i at Manoa, OVCAA/OIEP/ISS Honolulu, HI, 96822 |
| University of Hawai'i at Manoa - Outreach College | University/College | Outreach College Honolulu, HI, 96822 |
| University of Hawai'i Maui College | University/College | University of Hawai'i Maui College Kahului, HI, 96732 |
| Windward Community College | University/College | 45-720 Kealahala Road Kaneohe, HI, 96744 |
| University of Hawai'i William S. Richardson School of Law | Law School | 2515 Dole Street Honolulu, HI, 96822 |
| Educational Exchange Programs | | |
| Japan-America Institute of Management Science (JAIMS) | Educational Exchange | JAIMS 6660 Hawai'i Kai Drive Honolulu, HI, 96825 |

APPENDIX III: Total Economic Impact of International Students within the University of Hawai'i System on the State's Economy

1. **Direct Economic Impact.** Table AIII.1 presents a summary of the direct impact of University of Hawai'i's international students to the state's economy. It is based on international student expenditures for tuition/fees and living expenses. The table includes the contributions of long-term and short-term students and is categorized by the type of program. As noted earlier in the report, the living expense estimate was reduced based on the percentage of international students who were telecommuting from out-of-state.

Table AIII.1: Direct Economic Impact of International Students for the University of Hawai'i System, 2023

| Category | Number of Students | Spending by International Students on | | Total |
|--|--------------------|---------------------------------------|---------------------|----------------------|
| | | Tuition & Fees | Living Expenses* | |
| <i>Long-Term Students</i> | 1,520 | \$43,965,434 | \$30,737,313 | \$74,702,747 |
| Degree-seeking undergraduate students | 946 | \$23,685,997 | \$19,791,823 | \$43,477,820 |
| Degree-seeking graduate students | 574 | \$20,279,437 | \$10,945,490 | \$31,224,927 |
| | | | | |
| <i>Short-Term Students</i> | 1,814 | \$6,930,118 | \$18,937,442 | \$25,867,561 |
| Non-degree seeking undergraduate students | 841 | \$6,020,628 | \$6,294,065 | \$12,314,693 |
| Non-degree seeking graduate students | 9 | \$215,247 | \$115,698 | \$330,946 |
| Short-term training program students/professionals | 758 | \$680,243 | \$1,188,776 | \$1,869,019 |
| Students in summer/winter camps | 28 | \$14,000 | \$14,000 | \$28,000 |
| Visiting scholars/teachers | 178 | 0 | \$11,324,903 | \$11,324,903 |
| Total | 3,334 | \$50,895,552 | \$49,674,755 | \$100,570,308 |

Source: DBEDT, 2024 Hawai'i IES

*Living expenses are calculated based on the estimated percentage of international students who were living in-state.

The above figures are aggregated from the following University of Hawai'i related institutions: Hawai'i Community College, Kapiolani Community College, Kauai Community College, Leeward Community College, Windward Community College, UH-Maui College, UH-HELP, UH-Hilo, UH-Manoa, UH-Outreach College, and UH-West Oahu.

2. Total Economic Impact and Number of Jobs Supported. The total economic impact for the state included both the direct, indirect and induced impacts. The multipliers used for this calculation are taken from *The Hawai'i State Input-Output Study: 2017 Benchmark Report* (2022). Type II final demand multipliers were used, which include direct, indirect, and induced effects.

Tables AIII.2 summarizes the results and shows the economic impact of international students studying at various campuses across the University of Hawai'i System. The ***total output generated*** is an estimate of the total dollar change in output in all industries in the state, resulting from international student expenditures (living expenses and tuition/fees) attending the University of Hawai'i. Based on the direct output of \$100.6 million, the total output generated by international students for the University of Hawai'i System was estimated at \$198.1 million (Type II multiplier) for calendar year 2023.

Table AIII.2: Economic Impact of International Students within the University of Hawai'i System on the State's Economy

| | Final Demand Multiplier (Type II) | Economic Impact (Type II) |
|---|--|----------------------------------|
| Total Output Generated | 1.97 | \$198,123,507 |
| Total Household Income Generated | 0.86 | \$86,490,465 |
| Total State Taxes Generated | 0.139 | \$13,979,273 |
| Total Jobs Supported (2023) | 24.7 (per \$million) | 2,484 |

Source: DBEDT, 2022. Hawai'i State Input-Output Study: 2017 Benchmark Report. March.

Total household income generated refers to the estimated household earnings that can be attributed to international students studying within the University of Hawai'i system. Hawai'i households earned an estimated \$86.5 million generated from University of Hawai'i's international students for calendar year 2023.

The ***total state taxes generated*** line shows the estimated tax revenue that can be attributed to international students studying within the University of Hawai'i system. An estimated \$14.0 million in state taxes was generated by University of Hawai'i's international student spending for calendar year 2023.

The last line of the table shows the ***total number of jobs supported*** by international students studying within the University of Hawai'i system. Given an estimated direct economic impact of \$100.6 million for calendar year 2023, 2,484 jobs were supported. As noted above, these estimates are based on the Type II multiplier, which includes direct, indirect, and induced effects.