

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

Hawai'i Tourism Industry in November 2022¹

Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

A total of 735,340 visitors arrived in the Hawaiian Islands in November 2022, representing a 90.9 percent recovery from the same month in 2019. As measured in nominal dollars, these visitors spent \$1.52 billion in November 2022, an increase of 13.7 percent compared to the \$1.34 billion reported for November 2019. In November 2022, 725,469 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 9,872 visitors arrived by cruise ships during the month. In comparison, 792,547 visitors arrived by air (-8.5%) and 16,529 visitors came by cruise ships (-40.3%) in November 2019. The average length of stay by all visitors in November 2022 was 9.05 days, up from 8.30 days (+9.1%) in November 2019. The statewide average daily census² was 221,809 visitors in November 2022 compared to 223,746 visitors (-0.9%) in November 2019.

Hawai'i Tourism Industry in November 2022 Year-to-Date

- **Total Visitor Spending: \$17.40 billion**, up 9.0 percent from \$15.96 billion in the first 11 months of 2019.
- **State Tax Revenue (direct, indirect, and induced): \$2.02 billion**, compared to \$1.86 billion (+8.3%) in the first 11 months of 2019.
- **Visitor Arrivals: 8,375,977 visitors**, down 11.2 percent from 9,434,232 visitors in the first 11 months of 2019.
- **Average Daily Census: 230,507 visitors**, compared to 244,097 visitors (-5.6%) in the first 11 months of 2019.
- **Total Air Service: 54,867 trans-Pacific flights and 11,570,483 seats** compared to 56,100 flights (-2.2%) and 12,366,289 seats (-6.4%) in the first 11 months of 2019.

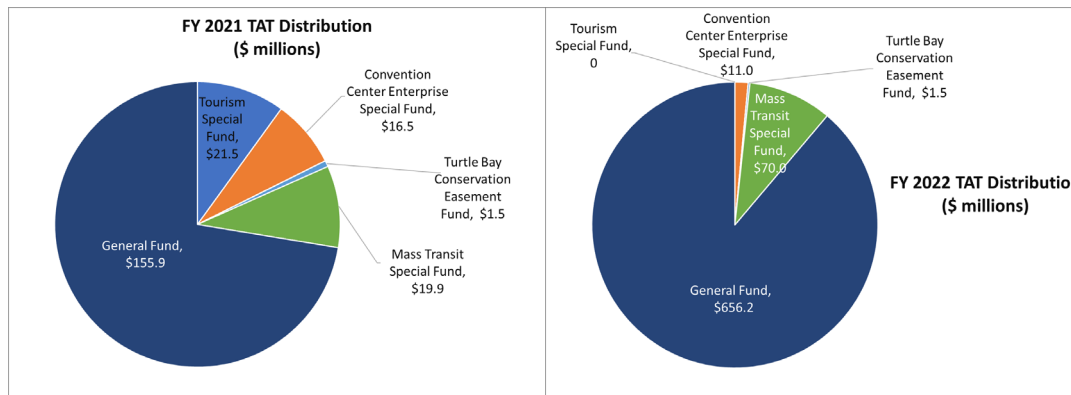
TAT Collections

- 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.

¹ 2022 visitor statistics are preliminary. 2021, 2020 and 2019 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.

- FY2023: Through October 2022, the state collected \$301.1 million in TAT, up 33.0 percent compared to \$226.3 million collected in FY 20 through October 2019 (Preliminary data from Dept of Taxation. November 2022 data were not available at the time of publication).



Hawai'i Tourism Industry in 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 flights: 51,904, Total Seats: 10,735,084;** 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 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).**
- **Air Seats: 5,318,667 (-60.9% versus 2019).**

Hawai'i Tourism Industry in 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**
- **Air Seats: 13,619,349 (+2.9% YOY versus 2018).**

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.

Hotel Occupancy Rates:

Occupancy Rate	2021	2020	2019	2018	2017	2016	2015
State	57.6%	37.6%	80.7%	80.3%	80.2%	79.1%	78.7%
O'ahu	55.6%	39.2%	84.0%	83.7%	83.5%	84.2%	85.1%
Maui County	60.2%	34.6%	77.7%	75.9%	77.0%	75.8%	74.3%
Island of Hawai'i	61.1%	39.7%	77.0%	74.6%	74.8%	68.7%	65.7%
Kaua'i	58.5%	33.2%	72.5%	77.5%	75.7%	72.6%	71.1%

Source: STR, Inc.

Historical Visitor Spending and Job Supported data:

Year	Total Daily Expenditures, Includes Sup Business	# of Jobs Supported
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