



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

Hawai'i Tourism Industry in 2019¹

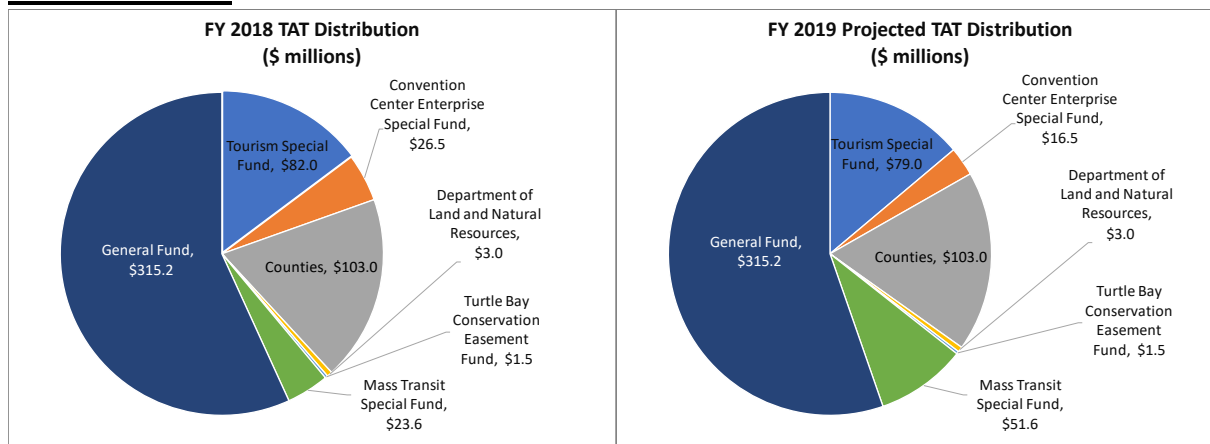
Tourism is the largest single source of private capital for Hawai'i's economy. In the first half of 2019, Hawai'i's tourism economy has recorded.

- **Visitor Spending: \$7.24 billion** (-2.0%, -\$183.2 million YOY versus the first half of 2018²).
 - ❖ Statewide: \$49.1 million in average visitor spending daily:
 - O'ahu: \$22.4 million per day
 - Maui: \$14.4 million per day
 - Island of Hawai'i: \$6.4 million per day
 - Kaua'i: \$5.3 million per day
- **State Tax Revenue: \$1.04 billion** (-\$21.4 million YOY versus the first half of 2018).
- **Visitor Arrivals: 5,191,523** (+4.2% YOY versus the first half of 2018).
 - ❖ On any given day were 251,000 visitors in the Hawaiian Islands.
- **Air Seats: 6,750,177** (+1.6% YOY versus the first half of 2018).

Opportunities for Continued Growth

- Increased arrivals during shoulder periods: April-May and October-November.
- Renovations, upgrades to Hawai'i's tourism product (hotels, attractions, natural resources).
- Increased distribution of visitors to the neighbor islands.

TAT Collections



¹ 2019 visitor statistics are preliminary. 2019 total visitor spending is in nominal dollars (not adjusted for inflation) and does not include supplemental business spending.

² Technical notes: The HTA received revised hotel room and package rates for the first quarter of 2018 which warranted revisions to published statistics (visitor expenditures, per person per day spending, and per person per trip spending) for first quarter 2018. 2018 visitor statistics will be finalized for the 2018 Annual Visitor Research Report. 2018 total visitor spending is in nominal dollars (not adjusted for inflation) and does not include supplemental business spending.

- FY 2017: The state collected \$508.38 million in transient accommodations tax (TAT=9.25%).
- FY 2018: The state collected \$554.9 million in TAT, an increase of 9.2% compared to FY 2017. (The TAT rate was increased to 10.25%, effective January 1, 2018. Tax revenues generated to be allocated to the Mass Transit Special Fund).
- FY 2019: Through May 2019, the state collected \$557.8 million in TAT, an increase of 9.2% compared to FY 2018 through May 2018.

Hawai'i Tourism Industry in 2018²

Hawai'i's tourism industry saw sustained growth in total visitor spending and visitor arrivals in 2018. This marked the seventh straight year of growth in both categories.

- **Visitor Spending: \$17.6 billion** (+5.7%, +\$946.8 million YOY versus 2017).
 - ❖ Statewide: \$48.3 million in average visitor spending daily:
 - O'ahu: \$22.1 million per day
 - Maui: \$13.7 million per day
 - Island of Hawai'i: \$6.5 million per day
 - Kaua'i: \$5.4 million per day
- **State Tax Revenue: \$2.07 billion** (+\$110.5 million YOY versus 2017).
- **Visitor Arrivals: 9,954,548 (+5.9% YOY versus 2017).**
 - ❖ On any given day were 243,000 visitors in the Hawaiian Islands.
- **Jobs: 215,000**
- **Air Seats: 13,248,069** (+8.3% YOY versus 2017).

Hotel Occupancy Rates:

| Occupancy Rate | 2018 | 2017 | 2016 | 2015 |
|-------------------|-------|-------|-------|-------|
| State | 79.8% | 80.2% | 79.1% | 78.7% |
| O'ahu | 83.9% | 83.5% | 84.2% | 85.1% |
| Maui County | 75.9% | 77.0% | 75.8% | 74.3% |
| Island of Hawai'i | 72.2% | 74.8% | 68.7% | 65.7% |
| Kaua'i | 75.4% | 75.7% | 72.6% | 71.1% |

Source: STR, Inc.

Hawai'i Tourism: A Decade of Recovery Leading to Growth

| Year | Total Daily Expenditures, Includes Sup Business ³ | # of Jobs Supported |
|------|--|---------------------|
| 2017 | \$46.1 million | 203,000 |
| 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 |
| 2009 | \$27 million | 134,000 |
| 2008 | \$31 million | 151,000 |
| 2007 | \$35 million | 172,000 |

³ Includes supplemental business spending.