



Fact Sheet: Benefits of Hawaii's Tourism Economy

Hawaii Tourism Industry in February 2021¹

During February 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. All trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawaii. Kaua'i County continued to temporarily suspend its participation in the Safe Travels program for trans-Pacific travelers, but inter-island travelers who had been in Hawaii for more than three days could bypass the quarantine with a valid test result. Trans-Pacific travelers to Kaua'i were given the option of participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawaii and Maui also had a partial quarantine in place in February. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

A total of 235,283 visitors traveled to Hawaii by air service in February 2021, compared to 812,967 visitors who came by air and cruise ships a year ago. Most of the visitors were from U.S. West (164,861, -53.6%) and U.S. East (63,899, -67.1%). Also, 695 visitors came from Japan (-99.4%) and 493 visitors came from Canada (-99.2%). There were 5,336 visitors from All Other International Markets (-93.2%). Many of these visitors were from Guam, and a small number of visitors were from Other Asia, Europe, Latin America, Oceania, Philippines and Pacific Islands.

In terms of average daily census, there were 60,249 visitors present in Hawaii on any given day during February from U.S. West (-42.7%), 26,996 visitors from U.S. East (-59.0%), 430 visitors from Japan (-98.2%), 488 visitors from Canada (-98.2%), and 2,613 visitors from All Other International Markets (-89.9%), down considerably compared to February 2020.

Total visitor spending² in February 2021 was \$385.3 million (-73.6%). This represented an average of \$13.8 million per day, compared to \$50.3 million per day in February 2020. U.S. West visitors spent \$9.4 million per day (-52.2%). U.S. East visitors spent \$4.1 million per day (-71.3%). Visitors from Japan spent \$86.1 thousand per day (-98.5%). Visitors from Canada spent \$80.6 thousand per day (-98.4%). Spending data for visitors from other markets were not available.

Hawaii Tourism Industry in February 2021 Year-to-Date

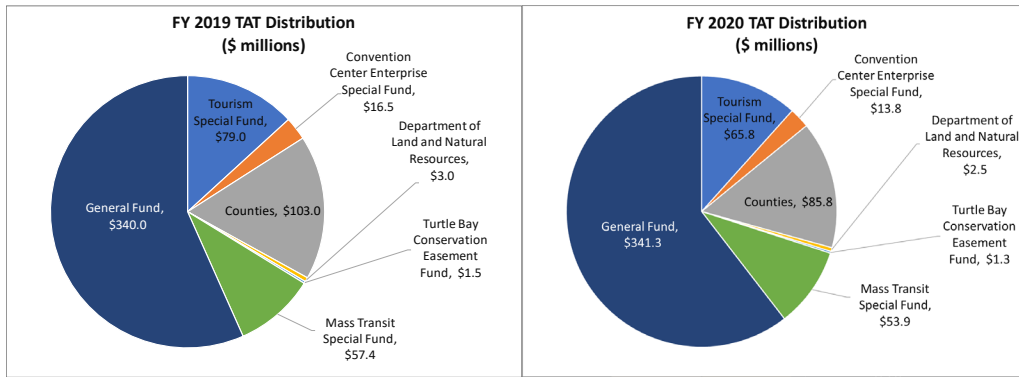
- **Total Visitor Spending²:** \$768.7 million (\$3.17 billion in the first two months of 2020).
- **State Tax Revenue: \$89.7 million** (\$370.2 million in the first two months of 2020).
- **Visitor Arrivals: 407,259** (1,690,630 visitors in the first two months of 2020).
- **Average Daily Census: 85,519 visitors per day** (260,059 visitors per day in the first two months of 2020).
- **Flight: 5,412, Seats: 1,126,201** (10,408 flights, 2,309,705 seats in the first two months of 2020).

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: Through February 2021, the state collected \$73.5 million in TAT, down 83.9 percent compared to FY 2020 through February 2020 (Preliminary data from Dept of Taxation).

¹ 2021 and 2020 visitor statistics are preliminary. 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 For February 2021 and for the first two months of 2021, spending statistics were from U.S. West, U.S. East, Japan and Canada visitors. Spending data for visitors from other markets were not available.



Hawai'i Tourism Industry in 2020

- **Visitor Spending:** Not Available for annual 2020 (\$17.72 billion in 2019).
- **State Tax Revenue:** Not Available for annual 2020. (\$2.07 billion in 2019).
- **Visitor Arrivals (Air and Cruise):** **2,716,195** (-73.8% compared to 2019).
- **Average Daily Census:** **78,421** 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)**³: **\$17.72 billion** (+1.2%, +\$206.4 million YOY versus 2018).
- **State Tax Revenue**⁴: **\$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:** **216,000** (Direct, indirect, induced)
- **Air Seats:** **13,619,349** (+2.9% YOY versus 2018).

Hotel Occupancy Rates:

Occupancy Rate	2020	2019	2018	2017	2016	2015
State	37.1%	80.7%	80.3%	80.2%	79.1%	78.7%
O'ahu	39.0%	84.0%	83.7%	83.5%	84.2%	85.1%
Maui County	33.9%	77.7%	75.9%	77.0%	75.8%	74.3%
Island of Hawai'i	38.0%	77.0%	74.6%	74.8%	68.7%	65.7%
Kaua'i	33.0%	72.5%	77.5%	75.7%	72.6%	71.1%

Source: STR, Inc.

Hawai'i Tourism: A Decade of Growth

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

³ 2019 total visitor spending is in nominal dollars and does not include supplemental business spending.

⁴ State government tax revenue generated (direct, indirect and induced)