

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

Hawai'i Tourism Industry in November 2021¹

In November 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

A total of 613,391 visitors arrived by air service to the Hawaiian Islands in November 2021, mainly from the U.S. West and U.S. East. In comparison, 183,779 visitors (+233.8%) arrived by air in November 2020. Total spending for visitors arriving in November 2021 was \$1.18 billion. Comparative total spending statistics for November 2020 were not available as data were from U.S. West and U.S. East visitors only. November 2020 spending data by visitors from other markets were unavailable because of limited fielding due to COVID-19 restrictions. When compared to 2019, visitor arrivals in November 2021 were down 24.2 percent from the November 2019 count of 809,076 visitors who arrived by air and by cruise ships. November 2021 visitor spending was lower than the \$1.34 billion (-11.5%) reported for November 2019.

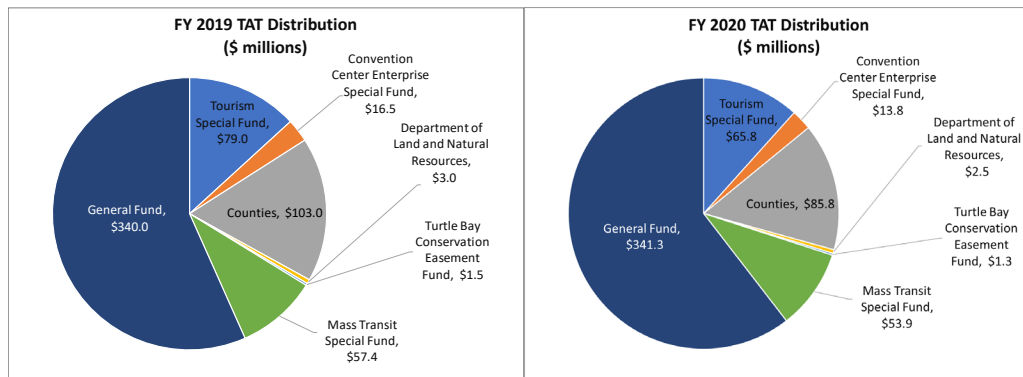
Hawai'i Tourism Industry in November 2021 Year-to-Date

- **Total Visitor Spending: \$11.34 billion.** Visitor spending declined 29.0 percent compared to \$15.96 billion in the first 11 months of 2019.
- **State Tax Revenue (direct, indirect and induced): \$1.32 billion;** a decrease of 29.0 percent from \$1.86 billion in the first 11 months of 2019.
- **Visitor Arrivals:** 6,023,827 visitors (+143.7%), more than double the arrival count from year-to-date 2020. Total visitor arrivals decreased 36.1 percent compared to the 9,434,232 visitors in the first 11 months of 2019.
- **Average Daily Census: 172,647 visitors;** compared to 76,789 visitors (+124.8%) in the first 11 months of 2020; versus 244,097 visitors per day (-29.3%) in the first 11 months of 2019.
- **Total flights: 46,722, Total Seats: 9,646,930;** compared to 21,524 flights and 4,719,227 seats in the first 11 months of 2020, versus 56,102 flights and 12,366,289 seats 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: Through June 2021, the state collected \$209.1 million in TAT, a decrease of 62.7 percent compared to FY 2020 through June 2020 (Preliminary data from Dept of Taxation).
- FY2022: Through November 2021, the state collected \$279.1 million in TAT, up 1,176.4 percent compared to \$21.9 million collected in FY 2021 through November 2020 (Preliminary data from Dept of Taxation).

¹2021 visitor statistics are preliminary. 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.



Hawai'i Tourism Industry in 2020

- **Visitor Spending: NA**
- **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).**

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