

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

Hawai'i Tourism Industry in December 2021¹

In December 2021, domestic passengers 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. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 viral test result taken within 24 hours of travel or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight. 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 753,670 visitors arrived by air service to the Hawaiian Islands in December 2021, primarily from the U.S. West and U.S. East. In comparison, 236,575 visitors (+218.6%) arrived by air in December 2020. total spending by visitors who came to the islands in December 2021 was \$1.66 billion. Comparative total spending statistics for December 2020 were not available as data were from U.S. West and U.S. East visitors only. December 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 December 2021 were down 20.9 percent from the December 2019 count of 952,441 visitors who arrived by air and by cruise ships. December 2021 visitor spending was lower than the \$1.75 billion (-5.5%) reported for December 2019.

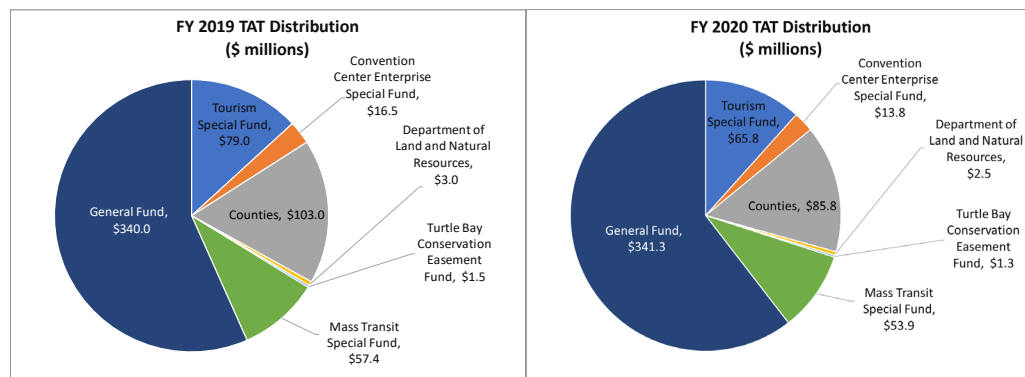
Hawai'i Tourism Industry in 2021

- **Total Visitor Spending: \$13.0 billion.** Visitor spending declined 26.6 percent from \$17.7 billion in 2019.
- **State Tax Revenue (direct, indirect and induced): \$1.52 billion;** a decrease of 26.6 percent from \$2.07 billion in 2019.
- **Visitor Arrivals: 6,777,498 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: 179,022 visitors;** compared to 78,305 visitors in 2020, versus 247,564 visitors in 2019.
- **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.

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 December 2021, the state collected \$326.9 million in TAT, up 830.5 percent compared to \$35.1 million collected in FY 2021 through December 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 DII O Mi Airline database, and final passenger counts from Airline Traffic Summary reports.



Hawai'i Tourism Industry in 2020

- **Visitor Spending:** NA²
- **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 |

² 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.