

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

Hawai'i Tourism Industry in January 2022¹

In January 2022, domestic passengers could bypass the State's mandatory 5-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. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 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. Cruise ships coming to Hawai'i beginning in January 2022 are required to sign a Memorandum of Agreement with the State Department of Transportation, Harbors Division. Cruise lines are required to follow strict health and safety protocols under the Hawai'i's Safe Travels program including vaccination, COVID-19 testing, and have a dedicated medical staff on board, cabins for isolation, and a contingency plan with local hospitals to handle any COVID issues.

total spending by visitors who came to the islands in January 2022 was \$1.40 billion, compared to \$397.9 million (+251.4%) spent in January 2021. Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. January 2022 visitor spending was lower compared to \$1.73 billion (-19.0%) spent in January 2020 and \$1.62 billion (-13.5%) reported for January 2019.

A total of 574,183 visitors came in January 2022. Of that number, 567,179 visitors arrived by air service, mainly from the U.S. West and U.S. East. Additionally, seven cruise ships brought another 7,004 visitors to the state. In comparison, 171,976 visitors (+233.9%) arrived by air only in January 2021; versus 857,066 visitors (-33.0%) who came by air and by cruise ships in January 2020; and 817,600 visitors (-29.8%) who arrived by air and by cruise ships in January 2019.

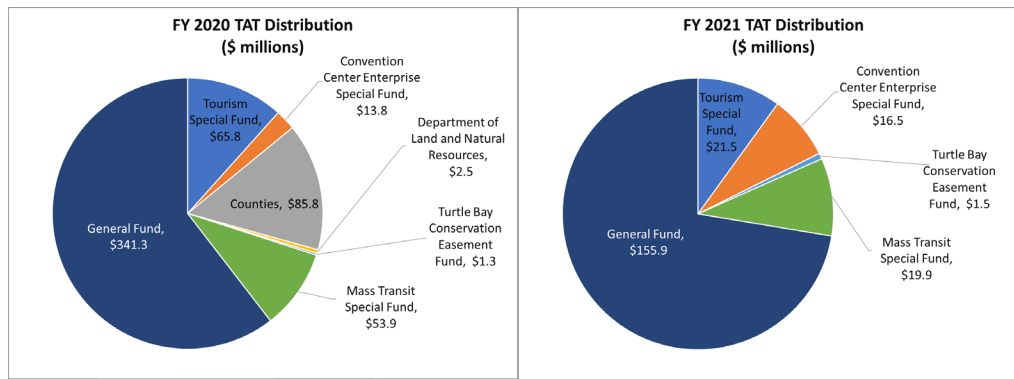
Hawai'i Tourism Industry in January 2022

- **Total Visitor Spending: \$1.40 billion;** compared to \$397.9 million (+251.4%) spent in January 2021.
- **State Tax Revenue (direct, indirect and induced): \$163.2 million;** compared to \$46.5 million (+251.4%) in January 2021.
- **Visitor Arrivals: 574,183 visitors;** compared to 171,976 visitors (+233.9%) in January 2021.
- **Average Daily Census: 202,071 visitors;** compared to 80,770 visitors in January 2021.
- **Total flights: 4,943, Total Seats: 1,036,109;** 2,856 flights with 593,981 seats in January 2021.

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 January 2022, the state collected \$408.0 million in TAT, up 622.4 percent compared to \$56.5 million collected in FY 2021 through January 2021 (Preliminary data from Dept of Taxation).

¹2022 and 2021 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 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.

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	2021	2020	2019	2018	2017	2016	2015
State	57.6%	37.1%	80.7%	80.3%	80.2%	79.1%	78.7%
O'ahu	55.6%	39.0%	84.0%	83.7%	83.5%	84.2%	85.1%
Maui County	60.2%	33.9%	77.7%	75.9%	77.0%	75.8%	74.3%
Island of Hawai'i	61.1%	38.0%	77.0%	74.6%	74.8%	68.7%	65.7%
Kaua'i	58.5%	33.0%	72.5%	77.5%	75.7%	72.6%	71.1%

Source: STR, Inc.

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.

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