

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

Hawai'i Tourism Industry in May 2022¹

Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In May 2022, there were no travel restrictions for passengers arriving on U.S. mainland flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

Total spending by visitors who came to the islands in April 2022 was \$1.56 billion, an increase of 10.6 percent compared to the \$1.41 billion reported for May 2019. A total of 776,375 visitors came to the Hawaiian Islands in May 2022. Of the total visitors, 774,144 arrived by air service, mainly from the U.S. West and U.S. East. Additionally, 2,231 visitors arrived by cruise ships. In comparison, 847,396 visitors (-8.4%) arrived by air (-7.4%) and by cruise ships (-80.3%) in May 2019. The average length of stay by all visitors in May 2022 was 8.87 days, up from 8.37 days (+6.0%) in May 2019. The average daily census² was 222,071 visitors in May 2022 compared to 228,768 visitors (-2.9%) in May 2019.

Hawai'i Tourism Industry in May 2022 Year-to-Date

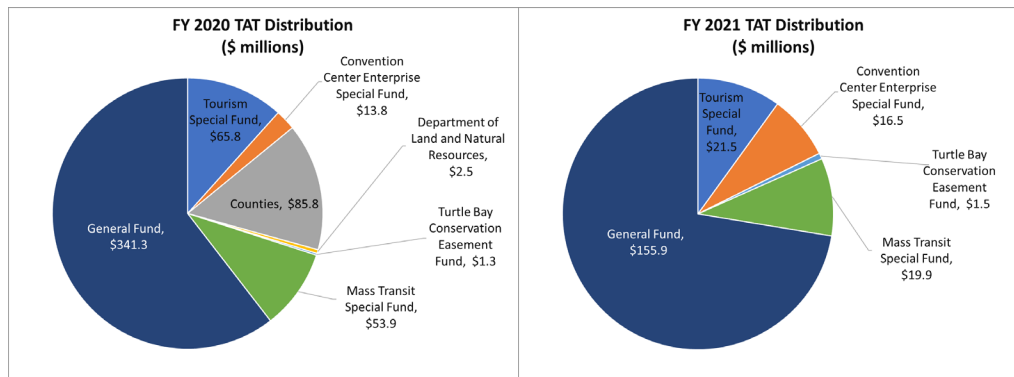
- **Total Visitor Spending: \$7.39 billion**, up 2.3 percent from \$7.23 billion in the first five months of 2019.
- **State Tax Revenue (direct, indirect and induced): \$857.6 million**, compared to \$843.6 million (+1.7%) in the first five months of 2019.
- **Visitor Arrivals: 3,588,405 visitors**, compared to 4,224,071 visitors (-15%) in the first five months of 2019.
- **Average Daily Census: 219,855 visitors**, compared to 244,402 visitors (-10%) in the first five months of 2019.
- **Total flights: 25,220 trans-Pacific flights and 5,262,494 seats**, compared to 25,330 flights and 5,567,901 seats in the first five 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: The state collected \$209.1 million in TAT; a decrease of 62.7 percent compared to FY 2020.
- FY2022: Through May 2022, the state collected \$669.3 million in TAT, up 304.5 percent compared to \$165.5 million collected in FY 2021 through May 2021 (Preliminary data from Dept of Taxation).

¹ 2022 and 2021 visitor statistics are preliminary. 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIIIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

² Average daily census measures the number of visitors present on any given day.



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.
- **Jobs supported (direct, indirect, induced): 158,000**
- **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: NA³**
- **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.

³ 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