



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

Hawai'i Tourism Industry in 2020¹

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner. A new state policy went into effect on November 24, requiring all trans-Pacific travelers participating in the pre-travel testing program to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrives in the state. Kaua'i, Hawai'i Island, Maui, and Moloka'i also had a partial quarantine in place in November. Lāna'i residents and visitors were under a stay-at-home order from October 27 to November 11. The U.S. Centers for Disease Control and Prevention continued to enforce the "No Sail Order" on all cruise ships.

This past November, a total of 183,779 visitors traveled to Hawai'i by air service, compared to 809,076 visitors who came by air service and cruise ships in November 2019. Most of the visitors were from the U.S. West (137,452, -63.4%) and U.S. East (40,205, -73.3%). In addition, 524 visitors came from Japan (-99.6%) and 802 came from Canada (-98.4%). There were 4,795 visitors from All Other International Markets (-94.3%). Many of these visitors were from Guam, and a small number of visitors were from the Philippines, Other Asia, Europe, Latin America, Oceania, and the Pacific Islands. Total visitor days² declined 65.9 percent compared to November of last year.

Spending statistics for November 2020 were all from U.S. visitors. Data by visitors from other markets were not available. U.S. West visitors spent \$251.9 million (-55.3%) in November 2020, and their average daily spending was \$156 per person (-12.8%). U.S. East visitors spent \$86.5 million (-71.8%) and \$160 per person on an average daily basis

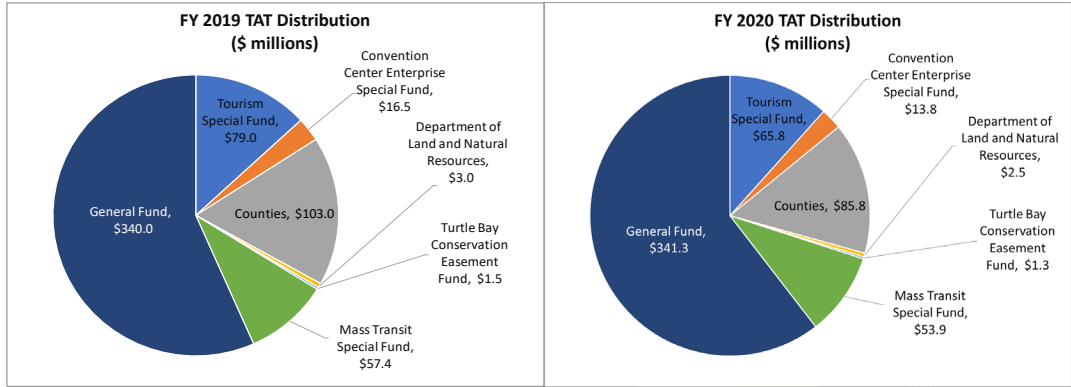
- **Visitor Spending:** Not Available for year-to-date November 2020 (\$15.96 billion in the first 11 months of 2019).
- **State Tax Revenue:** Not Available for year-to-date November 2020. (\$1.86 billion in the first 11 months 2019).
- **Visitor Arrivals: 2,480,401** (-73.7% compared to the first 11 months of 2019).
- **Average Daily Census: 76,953 visitors** (-68.5% compared to the first 11 months of 2019).
- **Air Seats: 4,278,381** (-62.1% versus the first 10 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 November 2020, the state collected \$21.9 million in TAT, down 92.0 percent compared to FY 2020 through November 2019.

¹ 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 Aggregate number of days stayed by all visitors.



Hawai'i Tourism Industry in 2019

- **Visitor Spending (Air and Cruise)³: \$17.72 billion (+1.2%, +\$206.4 million YOY versus 2018).**
 - ❖ **Statewide: \$48.5 million in average visitor spending daily:**
 - O'ahu: \$22.3 million per day
 - Maui: \$14.0 million per day
 - Island of Hawai'i: \$6.3 million per day
 - Kaua'i: \$5.2 million per day
- **State Tax Revenue⁴: \$2.07 billion (+1.2%, +\$24.1 million YOY versus 2018).**
- **Visitor Arrivals (Air and Cruise): 10,386,673 (+5.0% YOY versus 2018).**
 - ❖ On any given day were 248,000 visitors in the Hawaiian Islands.
- **Jobs supported: 216,000 (Direct, indirect, induced)**
- **Air Seats: 13,619,349 (+2.9% YOY versus 2018).**

Hotel Occupancy Rates:

Occupancy Rate	2019	2018	2017	2016	2015
State	81.2%	80.3%	80.2%	79.1%	78.7%
O'ahu	84.2%	83.7%	83.5%	84.2%	85.1%
Maui County	77.7%	75.9%	77.0%	75.8%	74.3%
Island of Hawai'i	71.1%	74.6%	74.8%	68.7%	65.7%
Kaua'i	76.3%	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)