

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

Hawai'i Tourism Industry in September 2021¹

In September 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. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to a surge in Delta variant cases that has overburdened the state's health care facilities and resources. 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 505,861 visitors arrived by air service to the Hawaiian Islands in September 2021, mainly from the U.S. West and U.S. East. In comparison, only 18,409 visitors arrived by air in September 2020 due to the pandemic and Hawai'i's quarantine requirement for travelers. Total spending for visitors arriving in September 2021 was \$1.05 billion. Comparative September 2020 visitor spending statistics were not available due to COVID-19 restrictions². When compared to 2019, visitor arrivals in September 2021 were down 31.3 percent from the September 2019 count of 736,155 visitors who arrived by air and by cruise ships. September 2021 visitor spending was lower than the \$1.25 billion (-15.4%) reported for September 2019.

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

- **Total Visitor Spending: \$9.03 billion.** Visitor spending declined 32.1 percent compared to \$13.30 billion in the first nine months of 2019.
- **State Tax Revenue (direct, indirect and induced): \$1.05 billion;** a decrease of 32.1 percent from \$1.55 billion in the first nine months of 2019.
- **Visitor Arrivals: 4,859,655 (+119.8%),** double the arrival count from year-to-date 2020. Total visitor arrivals were down 37.9 percent compared to the 7,828,965 visitors in the first nine months of 2019.
- **Average Daily Census: 171,569 visitors;** compared to 81,080 visitors (+111.6%) in the first nine months of 2020; versus 249,623 visitors per day (-31.3%) in the first nine months of 2019.
- **Total flights: 36,976, Total Seats: 7,626,172;** versus 18,277 total flights and 4,055,028 total seats in the first nine months of 2020; versus 46,412 total flights and 10,230,151 total seats in the first nine months of 2019.

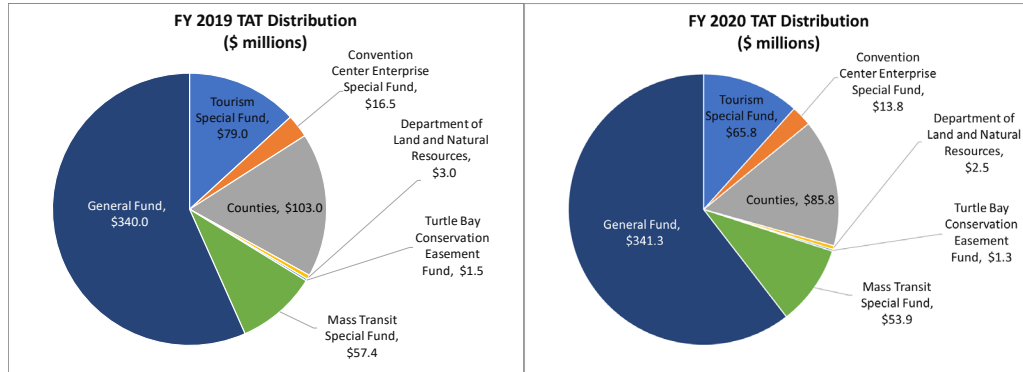
TAT Collections

- 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).

¹ 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.

² Comparative September 2020 and year-to-date September 2020 visitor spending statistics were not available, as there was no Departure Survey fielding between April through October 2020 due to COVID-19 restrictions.

- FY2022: Through September 2021, the state collected \$193.3 million in TAT, up 1,393.9 percent compared to \$12.9 million collected in FY 2021 through September 2020 (Preliminary data from Dept of Taxation).



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

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

Page 3

2011	\$34 million	156,000
2010	\$30 million	145,000