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Hawai'i Visitor Statistics Released for March 2020

HONOLULU – In March 2020, both visitor spending and arrivals were down more than 50 percent compared to a year ago, due to the COVID-19 pandemic, according to preliminary statistics released today.

Flight cancellations to the Hawaiian Islands began in February 2020, initially affecting the China market. In March the majority of flights to Hawai'i were cancelled, and the industry really started to see the impact.

On March 13, most cruise lines voluntarily suspended ship operations in U.S. waters. On March 17, Hawai'i Gov. David Ige asked upcoming visitors to postpone their trips for at least the next 30 days. The counties also began issuing stay-at-home orders. As of March 26, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine.

As a result, visitor spending was down 52.2 percent in March 2020, year-over-year. Visitors to Hawai'i spent a total of \$720.2 million, including U.S. West (-45.2% to \$316.8 million), U.S. East (-43.0% to \$230.5 million), Japan (-63.0% to \$67.5 million), Canada (-58.9% to \$56.5 million) and All Other International Markets (-76.3% to \$47.5 million).

Also in March, visitor arrivals were down 53.7 percent compared to a year ago. A total of 434,856 visitors traveled to Hawai'i, comprising arrivals by air service (-53.6% to 430,691) and cruise ships (-64.8% to 4,165). Total visitor days¹ declined 49.7 percent versus a year ago.

Arrivals by air service decreased from Japan (-66.1%), Canada (-65.0%), All Other International Markets (-60.6%), U.S. West (-49.7%) and U.S. East (-45.9%).

A total of 943,095 trans-Pacific air seats serviced the Hawaiian Islands in March, down 20.9 percent from a year ago, due to reduction/suspension of flights from Other Asia (-64.5%), Canada (-48.9%), Oceania (-37.3%), Japan (-26.7%), U.S. East (-14.2%) and U.S. West (-14.0%).

Year-to-Date 2020

Substantial decreases in March entirely offset positive results in January and February, and contributed to losses in visitor spending and arrivals for the first quarter of 2020.

Visitor spending dropped 14.1 percent compared to the first quarter of 2019 to \$3.89 billion, with decreases from U.S. West (-7.9% to \$1.51 billion), U.S. East (-6.7% to \$1.16 billion), Japan (-19.7% to \$415.7 million), Canada (-20.7% to \$361.5 million) and All Other International Markets (-34.8% to \$434.5 million) compared to a year ago.

¹ Aggregate number of days stayed by all visitors.

Total visitor arrivals in the first quarter declined 16.4 percent to 2,125,486 visitors due to fewer arrivals by air (-16.3% to 2,095,695) and cruise ships (-24.8% to 29,792) versus a year ago. Total visitor days dropped 15.1 percent.

Visitor arrivals by air service in the first quarter decreased from U.S. West (-11.8% to 908,883), U.S. East (-11.1% to 514,309), Japan (-21.5% to 294,228), Canada (-25.7% to 155,735) and All Other International Markets (-27.9% to 222,540).

Other Highlights:

- **U.S. West:** In March, half as many visitors arrived from the Pacific region (-52.5%) compared to a year ago, while arrivals from the Mountain region were down 40.4 percent. In the first quarter of 2020, visitor arrivals decreased from both the Pacific (-12.8%) and Mountain (-8.4%) regions compared to the same period last year.

In the first quarter of 2020, visitors spent an average of \$185 per person, per day, up from \$180 per person, per day last year. Visitors spent more for lodging, food and beverage, and shopping while transportation and entertainment and recreation expenses were similar to a year ago.

- **U.S. East:** In March, visitor arrivals dropped considerably from every region and contributed to decreases in the first quarter of 2020 from all regions. In the first quarter of 2020, arrivals from the three largest regions, East North Central, West North Central and South Atlantic declined 18.5 percent, 9.8 percent, and 11.1 percent, respectively, compared to the same period last year.

In the first quarter of 2020, average daily visitor spending rose to \$218 per person (+3.4%). Lodging and transportation expenses increased, while spending on food and beverage, shopping, and entertainment and recreation was about the same.

- **Japan:** In March, arrivals from Japan declined to 45,332 visitors (-66.1%), a third of what it was a year ago.

For the first quarter of 2020, per person, per day visitor spending was up (+1.5% to \$240) compared to a year ago. Lodging, food and beverage, transportation, and entertainment and recreation expenses increased, while spending on shopping declined.

- **Canada:** In March, arrivals from Canada were down 65 percent to 26,426 visitors.

For the first quarter of 2020, per person, per day visitor spending rose to \$176 (+3.1%). Lodging, food and beverage, transportation, shopping, and entertainment and recreation expenses increased compared to a year ago.

Highlights from All Other International Markets:

- **Australia:** Visitor arrivals decreased in March (-36.4% to 10,516) and through the first quarter of 2020 (-12.8% to 50,067) versus a year ago.
- **New Zealand:** Visitor arrivals dropped in March (-21.0% to 2,927) and through the first quarter of 2020 (-5.1% to 10,682).
- **China:** With the suspension of direct flights to Hawai'i since February 3, there were very few visitors from China in March (-97.0% to 205) compared to a year ago. Through the first quarter of 2020, visitor arrivals decreased (-66.1% to 9,952) year-over-year.

- **Korea:** Visitor arrivals dropped considerably in March (-82.0% to 2,399) and year-to-date (-34.1% to 41,614).
- **Taiwan:** Visitor arrivals declined significantly in March (-69.9% to 424) and through the first quarter of 2020 (-30.3% to 3,449).
- **Europe:** Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland decreased in March (-53.5% to 3,808) and through the first quarter of 2020 (-16.9% to 20,395).
- **Latin America:** Visitor arrivals from Mexico, Brazil and Argentina declined in March (-49.2% to 800) and year-to-date (-13.6% to 5,057).

Island Highlights:

- **O'ahu:** In March, visitor spending decreased 56.7 percent to \$299.3 million. Total visitor days dropped 50.4 percent and average daily spending was lower (-12.6% to \$171 per person). Visitor arrivals to O'ahu declined considerably (-55.2% to 238,305) due to fewer visitors from Japan (-66.5%), Canada (-64.6%), U.S. West (-49.5%) and U.S. East (-45.7%). The average daily census was down 50.4 percent to 56,417 visitors in March.

Through the first quarter, visitor spending (-21.2% to \$1.59 billion) and arrivals (-17.4% to 1,223,012) decreased compared to a year ago.

- **Maui:** In March, visitor spending dropped 49.7 percent to \$221.6 million. Total visitor days decreased (-51.1%), but average daily spending was up (+2.9% to \$209 per person) compared to a year ago. Visitor arrivals declined 54.5 percent to 125,943 with fewer visitors from Canada (-72.7%), Japan (-67.4%), U.S. West (-50.0%) and U.S. East (-47.0%). The average daily census decreased 51.1 percent to 34,164 visitors in March.

Through the first quarter, visitor spending (-10.2% to \$1.19 billion) and visitor arrivals (-17.6% to 603,188) were down compared to a year ago.

- **Kaua'i:** In March, visitor spending decreased 48.2 percent to \$78.9 million. Visitor days declined 50.9 percent but average daily spending (+5.5% to \$179 per person) was higher compared to a year ago. Visitor arrivals were down by half (-54.2% to 56,865) due to fewer travelers from Japan (-74.2%), Canada (-64.8%), U.S. East (-51.8%) and U.S. West (-51.7%). The average daily census showed 14,249 visitors in March (-50.9%).

Through the first quarter, visitor spending (-8.3% to \$441.5 million) and visitor arrivals (-15.9% to 281,681) declined compared to the same period a year ago.

- **Hawai'i Island:** In March, visitor spending decreased 44.3 percent to \$113.4 million as a result of declines in visitor days (-43.8%) and average daily spending (-0.9% to \$170 per person). Arrivals dropped 53.6 percent to 78,389 visitors with fewer travelers from Japan (-51.3%), U.S. West (-50.1%), U.S. East (-46.5%) and Canada (-42.9%). The average daily census decreased 43.8 percent to 21,519 visitors in March.

Through the first quarter, visitor spending (-4.0% to \$625.0 million) and visitor arrivals (-14.6% to 390,138) declined versus a year ago.

Air Seats to Hawai'i:

In March, total air capacity dropped 20.9 percent to 943,095 seats, comprised of 925,507 scheduled air seats (-21.9%) and 17,588 charter seats (+162.1%). There were significantly fewer air seats serving Honolulu (-20.9% to 569,088), Kahului (-15.4% to 211,757), Kona (-23.2% to 95,688) and Līhu'e (-33.1% to 62,910) compared to a year ago. Seats to Hilo (-0.4% to 3,652) were similar year-over-year.

- Scheduled seats from U.S. West decreased 14.0 percent in March. Service from many routes to Hawai'i, including Phoenix (-31.5%), Los Angeles (-23.1%), San Francisco (-19.3%), Portland (-19.0%), Denver (-18.0%), Salt Lake City (-12.1%) and Las Vegas (-8.6%) were suspended or reduced. A few exceptions were Sacramento (+51.1%), San Jose (+42.5%) and Oakland (+33.8%), which saw growth in air seats for the time being as airlines were reshuffling due to COVID-19.
- Scheduled air seats from U.S. East declined 14.2 percent in March. The addition of service from Boston (started April 2019) was offset by decreased service from Minneapolis (-35.5%), Atlanta (-23.4%), Dallas (-20.7%), Chicago (-16.6%), New York (-16.1%) and Houston (-9.7%).
- Scheduled air seats from Japan dropped 26.7 percent in March year-over-year, with fewer seats from Haneda (-49.5%), Osaka (-46.3%), Nagoya (-31.8%), Fukuoka (-16.1%) and Narita (-8.3%).
- Scheduled seats from Canada were down 48.9 percent in March as a result of reduced service from Vancouver (-54.4%) and Calgary (-32.7%).
- Scheduled air seats from Oceania declined 37.3 percent in March year-over-year. From the Australia market, there were fewer seats from Melbourne (-50.0%), Sydney (-40.8%) and Brisbane (-23.1%) compared to March 2019. The number of seats out of Auckland (-31.4%) also decreased considerably from a year ago.
- Scheduled seats from Other Asia declined by two-thirds (-64.5%) in March. From the China market, there was a loss of 3,318 seats from Beijing when an international carrier ended nonstop flights in late August 2019. Due to COVID-19 and the travel ban of Chinese citizens to the U.S., direct service from Shanghai to Hawai'i was suspended since early February (a loss of 7,884 seats). Air capacity from Seoul, Korea (-52.8%) was reduced by half compared to a year ago. Seats from Taipei, Taiwan were down 22.2 percent.
- Through the first quarter, total air seat capacity statewide dropped 2.5 percent to 3,252,800 seats. Declines in air seats serving Līhu'e (-12.1%), Kona (-4.1%), Honolulu (-3.6%) and Hilo (-2.0%) offset growth in seats to Kahului (+5.2%) compared to the same period last year.

Cruise Ship Visitors:

- Seven out-of-state cruise ships canceled their voyage to Hawai'i in March, leaving only two ships which brought 4,165 visitors to the islands. In comparison, six cruise ships came in March 2019 with 11,818 visitors.
- There was only one tour of the Hawai'i home-ported cruise ship with 2,242 visitors, compared to five tours with 11,937 visitors in March 2019. Total cruise visitors (by air and by cruise ships) dropped 73.0 percent to 6,407 visitors.
- For the first quarter, 29,792 visitors entered Hawai'i on 20 out-of-state cruise ships. Several of those ships were smaller in capacity compared to the 21 cruise ships that carried 39,632 visitors in the first quarter of 2019.

- There were 52,705 total cruise visitors in the first quarter of 2020, down 24.7 percent from a year ago.

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Technical Notes:

Tables of preliminary 2020 visitor characteristic and expenditure statistics including data presented in the news release; detailed monthly visitor characteristics data tables by visitor market and by island; fact sheets with visitor statistics and economic data for the State of Hawai'i and selected visitor markets; have been posted on the Hawai'i Tourism Authority website:

<https://www.hawaiitourismauthority.org/research/monthly-visitor-statistics/>

About the Hawai'i Tourism Authority

The [Hawai'i Tourism Authority](http://www.hawaiitourismauthority.org) is the State of Hawai'i agency responsible for strategically managing its support of the tourism industry. Established in 1998 to support Hawai'i's leading industry and largest employer, HTA continually strives to help ensure tourism's sustainability and the benefits it brings to residents and communities statewide.

For more information about HTA, please visit www.hawaiitourismauthority.org. Follow updates about HTA on [Facebook](#), [Instagram](#), [Twitter](#) (@HawaiiHTA) and its [YouTube Channel](#).

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MARCH 2020 ARRIVALS AT A GLANCE

TOTAL EXPENDITURES (\$mil.)	2020P	2019P	% change	2020P YTD	2019P YTD	% change
TOTAL EXPENDITURES (\$mil.)	720.2	1,506.4	-52.2	3,891.9	4,531.9	-14.1
Total by air	718.8	1,502.7	-52.2	3,879.4	4,519.9	-14.2
U.S. Total	547.3	982.1	-44.3	2,667.6	2,880.4	-7.4
U.S. West	316.8	577.8	-45.2	1,511.4	1,641.1	-7.9
U.S. East	230.5	404.3	-43.0	1,156.3	1,239.3	-6.7
Japan	67.5	182.4	-63.0	415.7	517.4	-19.7
Canada	56.5	137.4	-58.9	361.5	455.7	-20.7
All Others	47.5	200.8	-76.3	434.5	666.4	-34.8
Visitor arrivals by cruise ships	1.4	3.6	-60.2	12.5	12.0	4.2
TOTAL VISITOR DAYS	3,960,573	7,877,800	-49.7	19,564,106	23,030,361	-15.1
Total by air	3,940,084	7,828,996	-49.7	19,422,405	22,865,078	-15.1
U.S. Total	2,929,315	5,292,468	-44.7	13,478,807	15,019,402	-10.3
U.S. West	1,784,141	3,303,506	-46.0	8,173,302	9,138,755	-10.6
U.S. East	1,145,174	1,988,963	-42.4	5,305,505	5,880,647	-9.8
Japan	282,295	778,641	-63.7	1,729,323	2,185,346	-20.9
Canada	350,419	871,658	-59.8	2,053,433	2,668,391	-23.0
All Others	378,055	886,228	-57.3	2,160,842	2,991,938	-27.8
Visitor arrivals by cruise ships	20,489	48,803	-58.0	141,701	165,284	-14.3
VISITOR ARRIVALS	434,856	939,064	-53.7	2,125,486	2,542,269	-16.4
Total by air	430,691	927,246	-53.6	2,095,695	2,502,636	-16.3
U.S. Total	320,988	621,474	-48.4	1,423,192	1,609,481	-11.6
U.S. West	200,842	399,580	-49.7	908,883	1,030,644	-11.8
U.S. East	120,146	221,894	-45.9	514,309	578,837	-11.1
Japan	45,332	133,865	-66.1	294,228	374,946	-21.5
Canada	26,426	75,610	-65.0	155,735	209,525	-25.7
All Others	37,945	96,297	-60.6	222,540	308,684	-27.9
Visitor arrivals by cruise ships	4,165	11,818	-64.8	29,792	39,632	-24.8
AVERAGE DAILY CENSUS	127,760	254,123	-49.7	214,990	255,893	-16.0
Total by air	127,099	252,548	-49.7	213,433	254,056	-16.0
U.S. Total	94,494	170,725	-44.7	148,119	166,882	-11.2
U.S. West	57,553	106,565	-46.0	89,817	101,542	-11.5
U.S. East	36,941	64,160	-42.4	58,302	65,341	-10.8
Japan	9,106	25,117	-63.7	19,004	24,282	-21.7
Canada	11,304	28,118	-59.8	22,565	29,649	-23.9
All Others	12,195	28,588	-57.3	23,746	33,244	-28.6
Visitor arrivals by cruise ships	661	1,574	-58.0	1,557	1,836	-15.2
AVERAGE LENGTH OF STAY	9.11	8.39	8.6	9.20	9.06	1.6
Total by air	9.15	8.44	8.3	9.27	9.14	1.4
U.S. Total	9.13	8.52	7.2	9.47	9.33	1.5
U.S. West	8.88	8.27	7.4	8.99	8.87	1.4
U.S. East	9.53	8.96	6.3	10.32	10.16	1.5
Japan	6.23	5.82	7.1	5.88	5.83	0.8
Canada	13.26	11.53	15.0	13.19	12.74	3.5
All Others	9.96	9.20	8.3	9.71	9.69	0.2
Visitor arrivals by cruise ships	4.92	4.13	19.1	4.76	4.17	14.1
PER PERSON PER DAY SPENDING (\$)	181.9	191.2	-4.9	198.9	196.8	1.1
Total by air	182.4	191.9	-5.0	199.7	197.7	1.0
U.S. Total	186.8	185.6	0.7	197.9	191.8	3.2
U.S. West	177.6	174.9	1.5	184.9	179.6	3.0
U.S. East	201.3	203.3	-1.0	217.9	210.7	3.4
Japan	239.1	234.2	2.1	240.4	236.8	1.5
Canada	161.1	157.7	2.2	176.1	170.8	3.1
All Others	125.7	226.6	-44.5	201.1	222.7	-9.7
Visitor arrivals by cruise ships	70.7	74.5	-5.1	88.3	72.7	21.5
PER PERSON PER TRIP SPENDING (\$)	1,656.3	1,604.1	3.3	1,831.1	1,782.6	2.7
Total by air	1,668.9	1,620.6	3.0	1,851.1	1,806.1	2.5
U.S. Total	1,705.2	1,580.3	7.9	1,874.4	1,789.6	4.7
U.S. West	1,577.3	1,446.1	9.1	1,662.9	1,592.3	4.4
U.S. East	1,918.9	1,821.8	5.3	2,248.2	2,140.9	5.0
Japan	1,488.7	1,362.3	9.3	1,413.0	1,380.0	2.4
Canada	2,136.7	1,817.7	17.6	2,321.4	2,175.0	6.7
All Others	1,252.0	2,085.5	-40.0	1,952.5	2,158.7	-9.6
Visitor arrivals by cruise ships	347.6	307.5	13.0	420.0	303.0	38.6

P=Preliminary data.

Source:Hawaii Tourism Authority

MARCH 2020 ISLAND HIGHLIGHTS

TOTAL EXPENDITURES (\$mil.)	2020P	2019P	% change	2020P YTD	2019P YTD	% change
TOTAL EXPENDITURES (\$mil.)	720.2	1,506.4	-52.2	3,891.9	4,531.9	-14.1
Total by air	718.8	1,502.7	-52.2	3,879.4	4,519.9	-14.2
O'ahu	299.3	690.7	-56.7	1,590.9	2,019.7	-21.2
Maui	221.6	440.3	-49.7	1,192.6	1,328.3	-10.2
Moloka'i	1.9	3.7	-47.3	10.76	9.8	9.6
Lāna'i	3.6	12.2	-70.4	18.7	29.7	-37.2
Kaua'i	78.9	152.3	-48.2	441.5	481.6	-8.3
Haw ai'i Island	113.4	203.6	-44.3	625.0	650.8	-4.0
Visitor arrivals by cruise ships	1.4	3.6	-60.2	12.5	12.0	4.2
TOTAL VISITOR DAYS	3,960,573	7,877,800	-49.7	19,564,106	23,030,361	-15.1
Total by air	3,940,084	7,828,996	-49.7	19,422,405	22,865,078	-15.1
O'ahu	1,748,930	3,528,482	-50.4	8,594,611	10,297,961	-16.5
Maui	1,059,076	2,165,883	-51.1	5,215,931	6,213,346	-16.1
Moloka'i	14,061	22,653	-37.9	78,935	87,207	-9.5
Lāna'i	9,194	26,332	-65.1	57,747	69,752	-17.2
Kaua'i	441,724	899,013	-50.9	2,206,135	2,618,181	-15.7
Haw ai'i Island	667,101	1,186,634	-43.8	3,269,046	3,578,631	-8.7
Visitor arrivals by cruise ships	20,489	48,803	-58.0	141,701	165,284	-14.3
VISITOR ARRIVALS	434,856	939,064	-53.7	2,125,486	2,542,269	-16.4
Total by air	430,691	927,246	-53.6	2,095,695	2,502,636	-16.3
O'ahu	238,305	532,408	-55.2	1,223,012	1,481,081	-17.4
Maui	125,943	276,732	-54.5	603,188	732,139	-17.6
Moloka'i	2,353	4,824	-51.2	14,290	15,968	-10.5
Lāna'i	2,630	10,755	-75.5	14,872	23,353	-36.3
Kaua'i	56,865	124,196	-54.2	281,681	334,803	-15.9
Haw ai'i Island	78,389	168,850	-53.6	390,138	456,605	-14.6
Visitor arrivals by cruise ships	4,165	11,818	-64.8	29,792	39,632	-24.8
AVERAGE DAILY CENSUS	127,760	254,123	-49.7	214,990	255,893	-16.0
Total by air	127,099	252,548	-49.7	213,433	254,056	-16.0
O'ahu	56,417	113,822	-50.4	94,446	114,422	-17.5
Maui	34,164	69,867	-51.1	57,318	69,037	-17.0
Moloka'i	454	731	-37.9	867	969	-10.5
Lāna'i	297	849	-65.1	635	775	-18.1
Kaua'i	14,249	29,000	-50.9	24,243	29,091	-16.7
Haw ai'i Island	21,519	38,279	-43.8	35,924	39,763	-9.7
Visitor arrivals by cruise ships	661	1,574	-58.0	1,557	1,836	-15.2
AVERAGE LENGTH OF STAY	9.11	8.39	8.6	9.20	9.06	1.6
Total by air	9.15	8.44	8.3	9.27	9.14	1.4
O'ahu	7.34	6.63	10.7	7.03	6.95	1.1
Maui	8.41	7.83	7.4	8.65	8.49	1.9
Moloka'i	5.98	4.70	27.3	5.52	5.46	1.1
Lāna'i	3.50	2.45	42.8	3.88	2.99	30.0
Kaua'i	7.77	7.24	7.3	7.83	7.82	0.2
Haw ai'i Island	8.51	7.03	21.1	8.38	7.84	6.9
Visitor arrivals by cruise ships	4.92	4.13	19.1	4.76	4.17	14.1
PER PERSON PER DAY SPENDING (\$)	181.9	191.2	-4.9	198.9	196.8	1.1
Total by air	182.4	191.9	-5.0	199.7	197.7	1.0
O'ahu	171.1	195.8	-12.6	185.1	196.1	-5.6
Maui	209.2	203.3	2.9	228.6	213.8	7.0
Moloka'i	137.0	161.4	-15.2	136.3	112.6	21.0
Lāna'i	393.0	463.4	-15.2	323.1	426.1	-24.2
Kaua'i	178.7	169.4	5.5	200.1	183.9	8.8
Haw ai'i Island	170.1	171.6	-0.9	191.2	181.8	5.1
Visitor arrivals by cruise ships	70.7	74.5	-5.1	88.3	72.7	21.5
PER PERSON PER TRIP SPENDING (\$)	1,656.3	1,604.1	3.3	1,831.1	1,782.6	2.7
Total by air	1,668.9	1,620.6	3.0	1,851.1	1,806.1	2.5
O'ahu	1,255.8	1,297.3	-3.2	1,300.8	1,363.6	-4.6
Maui	1,759.5	1,591.0	10.6	1,977.2	1,814.3	9.0
Moloka'i	818.6	758.1	8.0	752.8	614.9	22.4
Lāna'i	1,373.9	1,134.7	21.1	1,254.7	1,272.9	-1.4
Kaua'i	1,388.4	1,226.0	13.2	1,567.3	1,438.4	9.0
Haw ai'i Island	1,447.2	1,205.9	20.0	1,602.1	1,425.2	12.4
Visitor arrivals by cruise ships	347.6	307.5	13.0	420.0	303.0	38.6

P=Preliminary data.

Source:Haw ai'i Tourism Authority