



## Oceania Fact Sheet

### Oceania Overview

The HTA, through Hawai'i Tourism Oceania (HTO), targets visitors from the countries of Australia and New Zealand, which have experienced steady growth in outbound travel to Hawai'i over recent years. Since 2004, the HTA has contracted with The Walshe Group Pty Ltd to provide marketing services in Oceania.

### Year-to-date August 2020 Quick Facts<sup>1</sup>

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (55,732) vs. MCI (891)
Average Length of Stay:	9.38 days
First Time Visitors:	45.8%
Repeat Visitors:	54.2%

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Aug. 2020P	YTD Aug. 2019	% change YTD
Visitor Expenditures* (\$ Millions)	1,045.2	895.1	-14.4%	NA	NA	NA	587.3	NA
Visitor Days	4,014,147	3,420,593	-14.8%	NA	NA	571,102	2,220,599	-74.3%
Arrivals	415,764	363,551	-12.6%	NA	NA	60,891	234,869	-74.1%
Average Daily Census	10,998	9,371	-14.8%	NA	NA	2,341	9,138	-74.4%
Per Person Per Day Spending* (\$)	260.4	261.7	0.5%	NA	NA	NA	264.5	NA
Per Person Per Trip Spending* (\$)	2,514.0	2,462.1	-2.1%	NA	NA	NA	2,500.7	NA
Length of Stay (days)	9.65	9.41	-2.5%	NA	NA	9.38	9.45	-0.8 %

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts were not available at the time of report publication.

### Contact Information

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<sup>1</sup> 2020 visitor data are preliminary. 2019 and 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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Due to the COVID-19 pandemic, all passengers arriving from out-of-state during August were required to abide by a mandatory 14-day self-quarantine. Exemptions include travel for essential reasons like work or healthcare. The U.S. Centers for Disease Control and Prevention (CDC) also continued to enforce its “No Sail Order” on all cruise ships.

In August 2020, 10 visitors (23,995 in August 2019) arrived from Australia and 15 visitors (7,565 in August 2019) came from New Zealand. Visitor spending data were not available.

- Through the first eight months of 2020, arrivals from Oceania declined 74.1 percent to 60,891 visitors. Visitor days decreased 74.3 percent. The average daily census showed 2,341 visitors per day, down 74.4 percent compared to the first eight months of 2019.
- Through the first eight months of 2020, scheduled air seats dropped 71.1 percent year-over-year.
- In 2019, both visitor arrivals (-12.6% to 363,511) and visitor days (-14.8%) declined and contributed to a drop in visitor spending (-14.4% to \$895.1 million) compared to 2018. Daily spending (+0.5% to \$262 per person) was slightly higher than the previous year. The average daily census showed 9,371 visitors per day in 2019, a drop of 14.8 percent compared to 2018.
- In 2019, scheduled air capacity from Oceania decreased 10.9 percent compared to 2018, with fewer seats from Auckland, New Zealand (-17.7%) and fewer combined seats from Brisbane, Melbourne, and Sydney, Australia (-3.0%).

## Market Conditions

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- Australia: Business conditions, profitability and expectations on employment have fallen in the first NAB Business Survey to include full Stage 4 lockdowns in Victoria – reversing most of the gains made in July. Most of Melbourne’s businesses will not return to normal operations until late October. Australia’s ‘real’ unemployment rate is set to increase as state borders remain closed and Victoria emerges from a second lockdown.
- While the official unemployment rate in Australia is 7.4 percent, this doesn't include the number of Australians stood down during the lockdown and those who have lost hours. Nearly one in ten Australian workers are now unemployed, with the effective unemployment rate down to 9.9 percent after a peak of 14.9 percent in April. However, it is set to climb back up to 13 percent.
- Australian consumer confidence rose in August again. The substantial decline in active cases in Melbourne and continued low numbers in Sydney have raised hopes that the pandemic can be contained without a broadening of lockdowns beyond those already in place. The Australian dollar continues to perform strongly, trading between US\$0.71-\$0.73 during August.
- New Zealand: The Country has experienced a return of COVID-19 in the community which has set back the economic recovery that it had been experiencing. The outbreak in Auckland required the government to bring the city back to a lockdown Level 3 status and the rest of the country at Level 2. Fortunately, this was only required for 2 weeks but the country is now all at Level 2 while the cluster is still present.
- The general election was due to take place in September but has been moved to October. The NZ dollar continues to trade strongly – at around US\$0.66.

- Hawaiian Airlines announced extended service cancellation to Australia and New Zealand. Instead of until 01DEC20, the following routes will now be suspended until 27MAR21: Honolulu – Auckland; Honolulu – Brisbane; and Honolulu – Sydney.

## Distribution by Island

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Aug. 2020P	YTD Aug. 2019	% change YTD
O'ahu	406,904	356,298	-12.4%	59,590	230,141	-74.1%
Maui County	70,440	61,691	-12.4%	8,832	40,739	-78.3%
Maui	69,544	60,582	-12.9%	8,641	39,913	-78.3%
Moloka'i	4,017	4,680	16.5%	833	3,234	-74.2%
Lāna'i	5,081	6,129	20.6%	847	4,287	-80.2%
Kaua'i	33,028	32,168	-2.6%	5,052	21,067	-76.0%
Island of Hawai'i	51,570	47,411	-8.1%	7,627	29,118	-73.8%

## Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	95,737		6,552	68,777	171,066	115,945	125,146	135,677	117,814	494,582	-17.4		-95.2	-41.6	-65.4
Auckland	25,438		6,552	21,018	53,008	29,744	30,284	36,032	29,240	125,300	-14.5		-81.8	-28.1	-57.7
Brisbane	10,008			3,614	13,622	11,120	10,842	11,676	11,398	45,036	-10.0			-68.3	-69.8
Melbourne	10,385			9,715	20,100	11,390	13,400	15,410	12,395	52,595	-8.8			-21.6	-61.8
Sydney	49,906			34,430	84,336	63,691	70,620	72,559	64,781	271,651	-21.6			-46.9	-69.0

Source: Diio Mii airline schedules. Updated July 29, 2020.

## Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Aug. 2020P	YTD Aug. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,035	7,017	-12.7%	1,645	4,784	-65.6%
True Independent (Net)	241,470	214,622	-11.1%	38,088	139,484	-72.7%
Leisure vs business						
Pleasure (Net)	391,778	339,605	-13.3%	55,732	218,811	-74.5%
MCI (Net)	6,793	4,470	-34.2%	891	2,458	-63.8%
Convention/Conf.	4,960	3,214	-35.2%	714	1,708	-58.2%
Corp. Meetings	383	420	9.7%	34	268	-87.5%
Incentive	1,613	858	-46.8%	143	504	-71.6%

## First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Aug. 2020P	YTD Aug. 2019	% change YTD
1st timers (%)	49.2	47.0	-2.1	45.8	47.5	-1.7
Repeaters (%)	50.8	53.0	2.1	54.2	52.5	1.7

## Tax Revenue

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Aug. 2020P	YTD Aug. 2019	% change YTD
State tax revenue generated* (\$ Millions)	122.01	104.48	-14.4%	NA	68.56	NA

\*State government tax revenue generated (direct, indirect, and induced)