



## 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 September 2020 Quick Facts <sup>1</sup>

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (55,735) vs. MCI (891)
Average Length of Stay:	9.41 days
First Time Visitors:	45.8%
Repeat Visitors:	54.2%

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
OCEANIA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,045.2	895.1	-14.4%	NA	NA	NA	689.7	NA
Visitor Days	4,014,147	3,420,593	-14.8%	NA	NA	573,393	2,628,085	-78.2%
Arrivals	415,764	363,551	-12.6%	NA	NA	60,934	278,530	-78.1%
Average Daily Census	10,998	9,371	-14.8%	NA	NA	2,093	9,627	-78.3%
Per Person Per Day Spending* (\$)	260.4	261.7	0.5%	NA	NA	NA	262.4	NA
Per Person Per Trip Spending* (\$)	2,514.0	2,462.1	-2.1%	NA	NA	NA	2,476.3	NA
Length of Stay (days)	9.65	9.41	-2.5%	NA	NA	9.41	9.44	-0.3%

\*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 DIIOMi 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 September 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.

The Australian Government continues to impose a ban on all overseas travel for Australians, unless an exemption is granted. Residents returning to Australia must undergo a mandatory 14-day quarantine. The New Zealand Government is currently advising New Zealanders to not travel overseas due to COVID-19 health risks and travel restrictions. Residents returning to New Zealand must complete at least 14 days of quarantine and test negative for COVID-19 before entering the community.

In September 2020, 16 visitors (35,323 in September 2019) arrived from Australia and 27 visitors (8,338 in September 2019) came from New Zealand. Visitor spending data were not available.

- Through the first nine months of 2020, arrivals from Oceania declined 78.1 percent to 60,934 visitors. Visitor days decreased 78.2 percent. The average daily census showed 2,093 visitors per day, down 78.3 percent compared to the first nine months of 2019.
- Through the first nine months of 2020, scheduled air seats dropped 74.6 percent year-over-year.
- In 2019, both visitor arrivals (-12.6% to 363,511) and visitor days (-14.8% declined 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: The official unemployment is currently 6.8 per cent. The latest ABS data shows Australia has regained about half the jobs it lost since the COVID-19 pandemic started. Hospitality and recreation had strong jobs growth over the past few months. At the end of the month Melbourne restrictions eased and 127,000 Victorians were able to go back to work. Some industries that were completely shut down can start to reopen, and others that were operating with restricted workforces can increase their capacity. As of September 28, the full-time Job Keeper subsidy rate officially reduced from \$1,500 to \$1,200 a fortnight, and a new \$750 Job Keeper part-time rate has been introduced for those who were working less than 20 hours a week before the pandemic hit.
- The Australian dollar continues to perform strongly, trading between US\$0.71-\$0.73 during September.
- New Zealand: Following 105 days free of COVID in the community, New Zealand had a setback in August with the return of a cluster that expanded to well over 100 people. Through more restrictions, in Auckland in particular, the country was able to bring this cluster under control through September to be able to once again have no COVID in the community. The recent outbreak had a negative effect on businesses, particularly in Auckland and has been a setback for the economic recovery which we had started to see. On the positive side, the strict reaction, while having short-term hardship, now allows for large events to be held again.

- With the new outbreak, NZ Prime Minister announced that the general election which was scheduled to be held on September 19 would be delayed until October 17. A Trans-Tasman bubble allowing travel between Australia and New Zealand looks promising again with the success in Australia. New South Wales and Northern Territory have announced they will allow New Zealanders to travel with no quarantining.
- The NZ dollar continues to trade around US\$0.66.

## Distribution by Island

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
O'ahu	406,904	356,298	-12.4%	59,610	272,947	-78.2%
Maui County	70,440	61,691	-12.4%	8,839	49,186	-82.0%
Maui	69,544	60,582	-12.9%	8,647	48,234	-82.1%
Moloka'i	4,017	4,680	16.5%	834	3,905	-78.6%
Lāna'i	5,081	6,129	20.6%	849	5,103	-83.4%
Kaua'i	33,028	32,168	-2.6%	5,055	25,814	-80.4%
Island of Hawai'i	51,570	47,411	-8.1%	7,646	35,875	-78.7%

## Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	95,737	0	0	0	95,737	115,945	125,146	135,677	117,814	494,582	-17.4	100.0	-100.0	100.0	-80.6
Auckland	25,438	0	0	0	25,438	29,744	30,284	36,032	29,240	125,300	-14.5	100.0	-100.0	100.0	-79.7
Brisbane	10,008	0	0	0	10,008	11,120	10,842	11,676	11,398	45,036	-10.0	100.0	-100.0	100.0	-77.8
Melbourne	10,385	0	0	0	10,385	11,390	13,400	15,410	12,395	52,595	-8.8	100.0	-100.0	100.0	-80.3
Sydney	49,906	0	0	0	49,906	63,691	70,620	72,559	64,781	271,651	-21.6	100.0	-100.0	100.0	-81.6

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

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

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,035	7,017	-12.7%	1,645	5,439	-69.8%
True Independent (Net)	241,470	214,622	-11.1%	38,128	164,126	-76.8%
Leisure vs business						
Pleasure (Net)	391,778	339,605	-13.3%	55,735	259,791	-78.5%
MCI (Net)	6,793	4,470	-34.2%	891	2,907	-69.4%
Convention/Conf.	4,960	3,214	-35.2%	714	2,101	-66.0%
Corp. Meetings	383	420	9.7%	34	280	-88.0%
Incentive	1,613	858	-46.8%	143	548	-73.9%

## First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Sep. 2020P	YTD Sep. 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 Sep. 2020P	YTD Sep. 2019	% change YTD
State tax revenue generated* (\$ Millions)	122.01	104.48	-14.4%	NA	80.51	NA

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

