



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 November 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (55,836) vs. MCI (892)
Average Length of Stay:	9.46 days
First Time Visitors:	45.7%
Repeat Visitors:	54.3%

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
OCEANIA MMA (by Air)								
Visitor Expenditures* (\$ Millions)	1,045.2	895.1	-14.4%	NA	NA	NA	825.5	NA
Visitor Days	4,014,147	3,420,593	-14.8%	NA	NA	578,230	3,138,095	-81.6%
Arrivals	415,764	363,551	-12.6%	NA	NA	61,105	334,768	-81.7%
Average Daily Census	10,998	9,371	-14.8%	NA	NA	1,726	9,395	-81.6%
Per Person Per Day Spending* (\$)	260.4	261.7	0.5%	NA	NA	NA	263.1	NA
Per Person Per Trip Spending* (\$)	2,514.0	2,462.1	-2.1%	NA	NA	NA	2,465.8	NA
Length of Stay (days)	9.65	9.41	-2.5%	NA	NA	9.43	9.37	0.9%

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

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

Market Summary

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. Starting November 6, travelers from Japan could also bypass the mandatory quarantine in Hawai'i with a negative test result from a trusted testing partner in Japan. However, upon returning to Japan, the travelers were subject to a 14-day quarantine. A new 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. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "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 November 2020, 65 visitors (18,725 in November 2019) arrived from Australia and 51 visitors (4,338 in November 2019) came from New Zealand. Visitor spending data were not available.

- Through the first 11 months of 2020, arrivals from Oceania declined 81.7 percent to 61,105 visitors. Visitor days decreased 81.6 percent. The average daily census showed 1,726 visitors per day, down 81.6 percent compared to the first 11 months of 2019.
- Through the first 11 months of 2020, scheduled air seats dropped 78.9 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

- Australia: New data from the ABS shows Australia's GDP increased 3.3 percent in the September quarter driven by household spending, which is up 7.9 percent. However, while the economic recovery is progressing better than expected, it will take some time to recover in line with the global economic climate. Unemployment increased slightly from 6.9 percent to 7 percent in October but there was a strong surge in the number of people hired as Victoria's coronavirus lockdown eased. The underemployment rate (people who want more hours) dropped from 11.4 percent to 10.4 percent. More than two million workers have left the Job Keeper wage subsidy scheme since eligibility was tightened and payment rates were reduced at the end of September. Fewer businesses relying on the payments shows that the economy is bouncing back faster than expected. These economic figures build on other important and positive data that we've seen in recent weeks with 178,000 new jobs that were created last month.

- Consumer Confidence is on the rise in Australia at its highest level since February. The news about the successful vaccine trial played a major role. The strong result points to a potentially strong Christmas season ahead for retailers (N.B. there was a slight decrease in confidence due to the small coronavirus cluster in South Australia however the trend in confidence is very encouraging). The Australian dollar is continuing to hold firm at the higher end of the scale when compared to the last 12 months, sitting around US\$0.73.
- New Zealand: New Zealand continues to have no COVID-19 cases in the community with the only positive cases being related to International arrivals being housed at the managed isolation hotels. Recent business confidence figures released have seen confidence return to pre-COVID-19 levels. This is a sign of the success of shutting out COVID-19 and the resulting positive impact to the domestic economy.
- The New Zealand dollar has strengthened over the month to levels not seen in the last two years. The NZ Dollar is currently trading at US\$0.70. In summary from a domestic and economic perspective, New Zealand and New Zealanders are in a good position to begin travelling again when the restrictions are lifted.

Distribution by Island

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
O'ahu	406,904	356,298	-12.4%	59,716	328,078	-81.8%
Maui County	70,440	61,691	-12.4%	8,907	58,204	-84.7%
Maui	69,544	60,582	-12.9%	8,715	57,170	-84.8%
Moloka'i	4,017	4,680	16.5%	834	4,617	-81.9%
Lāna'i	5,081	6,129	20.6%	849	5,991	-85.8%
Kaua'i	33,028	32,168	-2.6%	5,069	30,253	-83.2%
Island of Hawai'i	51,570	47,411	-8.1%	7,658	43,232	-82.3%

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 Nov. 2020P	YTD Nov. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,035	7,017	-12.7%	1,645	6,740	-75.6%
True Independent (Net)	241,470	214,622	-11.1%	38,289	195,401	-80.4%
Leisure vs business						
Pleasure (Net)	391,778	339,605	-13.3%	55,836	312,849	-82.2%
MCI (Net)	6,793	4,470	-34.2%	892	3,965	-77.5%
Convention/Conf.	4,960	3,214	-35.2%	714	2,853	-75.0%
Corp. Meetings	383	420	9.7%	35	415	-91.6%
Incentive	1,613	858	-46.8%	143	718	-80.0%

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
1st timers (%)	49.2	47.0	-2.1	45.7	47.1	-1.4
Repeaters (%)	50.8	53.0	2.1	54.3	52.9	1.4

Tax Revenue

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Nov. 2020P	YTD Nov. 2019	% change YTD
State tax revenue generated* (\$ Millions)	122.01	104.48	-14.4%	NA	96.36	NA

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