



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 December 2020 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (55,909) vs. MCI (894)
Average Length of Stay:	9.49 days
First Time Visitors:	45.7%
Repeat Visitors:	54.3%

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
Visitor Expenditures* (\$ Millions)	1,045.2	895.1	-14.4%	188.6	-78.9%	NA	895.1	NA
Visitor Days	4,014,147	3,420,593	-14.8%	742,970	-78.3%	580,938	3,420,593	-83.0%
Arrivals	415,764	363,551	-12.6%	72,511	-80.1%	61,226	363,551	-83.2%
Average Daily Census	10,998	9,371	-14.8%	2,218	-76.3%	1,587	9,371	-83.1%
Per Person Per Day Spending* (\$)	260.4	261.7	0.5%	253.8	-3.0%	NA	261.7	NA
Per Person Per Trip Spending* (\$)	2,514.0	2,462.1	-2.1%	2,600.8	5.6%	NA	2,462.1	NA
Length of Stay (days)	9.65	9.41	-2.5%	10.25	8.9%	9.49	9.41	0.8%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts.

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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 DIO 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 through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in Hawai'i. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's (CDC) guidelines. The counties of Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in December. In addition, the 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 December 2020, 57 visitors (23,206 in December 2019) arrived from Australia and 63 visitors (5,577 in December 2019) came from New Zealand. Visitor spending data were not available.

- For all of 2020, arrivals from Oceania declined 83.2 percent to 61,226 visitors. Visitor days decreased 83.0 percent. The average daily census showed 1,587 visitors per day, down 83.1 percent compared to 2019.
- In 2020, scheduled air seats dropped 80.6 percent compared to the previous 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 restrictions for the Greater Sydney area have been put in place to contain a cluster of Covid-19 in Sydney prior to Christmas. The government has acted quickly to contain the cluster, restrictions on New Year's Eve celebrations were put in place including the fireworks in Sydney and state borders have been closed as a precaution. There were zero community transmissions reported at the start of the week. Australia is ahead of schedule on plans for a coronavirus vaccine rollout with distribution expected to begin in February. The government has maintained an approach of "under-promising and over-delivering" and we are optimistic that rapid implementation of the vaccine will allow us to open our borders to international travel.
- Unemployment has dropped from 7 percent to 6.8percent, with 90,000 people starting work in November. 80 percent of the increase was due to the easing of restrictions in Melbourne allowing many businesses to reopen and take on staff. Unemployment is now at its lowest level

since April, having peaked at 7.5 percent in July. Underemployment fell 1 percent, to sit at 9.4 percent compared to a peak of 13.8 percent in April. 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\$0.75.

- 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. The economy looks like it might have exited a Covid-19 driven recession with a 14 percent gain in gross domestic product (GDP) over the September quarter. While there is still wariness about the future, this is a very positive sign that the hard lockdown back in March was the right call.
- 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\$0.72.

Distribution by Island

OCEANIA MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	406,904	356,298	-12.4%	59,789	356,298	-83.2%
Maui County	70,440	61,691	-12.4%	8,954	61,691	-85.5%
Maui	69,544	60,582	-12.9%	8,763	60,582	-85.5%
Moloka'i	4,017	4,680	16.5%	834	4,680	-82.2%
Lāna'i	5,081	6,129	20.6%	849	6,129	-86.1%
Kaua'i	33,028	32,168	-2.6%	5,074	32,168	-84.2%
Island of Hawai'i	51,570	47,411	-8.1%	7,669	47,411	-83.8%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	95,737	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 Dec. 2020P	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	8,035	7,017	-12.7%	1,647	7,017	-76.5%
True Independent (Net)	241,470	214,622	-11.1%	38,401	214,622	-82.1%
Leisure vs business						
Pleasure (Net)	391,778	339,605	-13.3%	55,909	339,605	-83.5%
MCI (Net)	6,793	4,470	-34.2%	894	4,470	-80.0%
Convention/Conf.	4,960	3,214	-35.2%	714	3,214	-77.8%
Corp. Meetings	383	420	9.7%	37	420	-91.2%
Incentive	1,613	858	-46.8%	143	858	-83.3%

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2018	2019P	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
1st timers (%)	49.2	47.0	-2.1	45.7	47.0	-1.3
Repeaters (%)	50.8	53.0	2.1	54.3	53.0	1.3

Tax Revenue

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

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