



Oceania Fact Sheet

Oceania Overview

Hawai'i Tourism Oceania (HTO) is contracted by HTA for brand marketing management services in Oceania. The marketing approach for Oceania is based around a recovery plan that facilitates a timely and appropriate return of visitors from Australia and New Zealand. HTO's brand position is underpinned by HTA's key pillars and is aligned with the themes of natural beauty, unique culture and responsible tourism.

Strategy

- Concentrate a significant percentage of consumer direct marketing through digital channels, in recognition of the potential reach and cost effectiveness of digital marketing, and increased connectivity due to changed work and lifestyle patterns. Wherever possible, initiatives will be integrated to ensure audience reach through as many touchpoints as possible – including public relations, consumer direct, social, digital, tactical and trade.
- Be the brand leader in the market, to inspire the consumer, ensure the right match of experiences, and for trade to align with, all in efforts to ensure competitive advantage for the destination and attract a traveller that chooses Hawai'i for the right reasons. This includes matching holiday dreams and aspirations with the rich and diverse experiences of the six Hawaiian Islands.

Year-to-Date March 2021 Quick Facts^{1/}

Visitor Expenditures:	Not available
Primary Purpose of Stay:	Pleasure (210) vs. MCI (1)
Average Length of Stay:	22.31 days
First Time Visitors:	28.8%
Repeat Visitors:	71.2%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{2/}	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions) *	895.1	143.6*	NA	202.8	N/A	143.6	N/A
Visitor Days	3,420,593	580,938	-83.0%	786,033	7,147	566,239	-98.7%
Arrivals	363,551	61,226	-83.2%	82,654	320	60,749	-99.5%
Average Daily Census	9,371	1,587	-83.1%	2,154	79	6,222	-98.7%
Per Person Per Day Spending (\$) *	261.7	253.6*	NA	258.0	N/A	253.6	N/A
Per Person Per Trip Spending (\$) *	2,462.1	2,363.3*	NA	2,453.4	N/A	2,363.3	N/A
Length of Stay (days)	9.41	9.49	0.8%	9.51	22.31	9.32	139.3%

* 2020 visitor spending data were only available for January – March 2020. Data for other months were not available due to limited samples.

* 2021P year-to-date visitor spending data for January-March 2021 were not available due to limited samples.

^{2/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

^{1/} 2021 and 2020 visitor data are preliminary. 2019 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.

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Market Summary

During March 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. 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. Kaua'i County continued to temporarily suspend its participation in the state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kaua'i to quarantine upon arrival except for those participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in March. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing 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 the first quarter 2021, 103 visitors arrived from Australia compared to 50,067 year-to-date 2020. The average daily census showed 45 visitors per day compared to 5,159 visitor per day in the first quarter of 2020.
- There were 218 visitors from New Zealand versus 10,682 visitors in the first quarter of 2020. The average daily census showed 34 visitors per day compared to 1,064 visitor per day in the first quarter of 2020. Visitor spending data were not available.
- There were no scheduled flights from Oceania during the first quarter of 2021, compared to 328 scheduled flights and 95,737 seats a year ago.
- 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

- A number of major COVID-19 restrictions eased across Australia this month, allowing larger gatherings, easing of density limits across all venues and reducing mask wearing. The Australian economy is predicted to rebound faster than expected from the coronavirus recession, reaching its pre-pandemic level within weeks, but it will continue to be supported by record-low interest rates for years. The International Monetary Fund has forecast the Australian economy to expand 4.5 percent this year after shrinking by 2.4 percent in 2020. It is a substantial upgrade to the fund's January forecasts when it expected the Australian economy to grow by 3.5 percent this year after contracting by 2.9 percent in 2020.
- At the end of March, business confidence hit a 7-year high despite the approaching end of JobKeeper wage subsidy – according to Roy Morgan Business Confidence statistics, 59.4 percent of businesses said the next 12 months is a 'good time to invest'. March saw a slight softening of the AU Dollar although it is still offering great value against the US Dollar at \$0.76.
- The New Zealand domestic economy continues to operate without major restrictions due to the strict border controls and approach to keeping COVID-19 out of the community. The upcoming opening of the Trans-Tasman bubble between Australia and New Zealand (mid-April) is great news not just for tourism, but for the important business transfer between the two countries.
- The NZ Dollar softened slightly over March, ending the month trading at US\$0.70.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	356,298	59,789	-83.2%	172	59,484	-99.7%
Maui County	61,691	8,954	-85.5%	95	8,814	-98.9%
Maui	60,582	8,763	-85.5%	95	8,628	-98.9%
Moloka'i	4,680	834	-82.2%	0	830	-100.0%
Lāna'i	6,129	849	-86.1%	0	845	-100.0%
Kaua'i	32,168	5,074	-84.2%	34	5,041	-99.3%
Island of Hawai'i	47,411	7,669	-83.8%	58	7,608	-99.2%

Airlift

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	0	0	169	310	479	328	0	0	0	328	-100.0	NA	NA	NA	46.0
Auckland	0	0	39	68	107	86	0	0	0	86	-100.0	NA	NA	NA	24.4
Brisbane	0	0	39	40	79	36	0	0	0	36	-100.0	NA	NA	NA	119.4
Melbourne	0	0	0	20	20	31	0	0	0	31	-100.0	NA	NA	NA	-35.5
Sydney	0	0	91	182	273	175	0	0	0	175	-100.0	NA	NA	NA	56.0

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of March 18, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	1,647	-76.5%	12	1,645	-99.3%
True Independent (Net)	214,622	38,401	-82.1%	287	37,957	-99.2%
Leisure vs business						
Pleasure (Net)	339,605	55,909	-83.5%	210	55,705	-99.6%
MCI (Net)	4,470	894	-80.0%	1	887	-99.9%
Convention/Conf.	3,214	714	-77.8%	0	713	-100.0%
Corp. Meetings	420	37	-91.2%	0	31	-100.0%
Incentive	858	143	-83.3%	1	143	-99.3%

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
1st timers (%)	47.0	45.7	-1.3	28.8	45.9	-17.0
Repeaters (%)	53.0	54.3	1.3	71.2	54.1	17.0

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
State tax revenue generated (\$ Millions) ^{3/}	104.48	16.76*	NA	NA	16.76	NA

^{3/} State government tax revenue generated (direct, indirect, and induced)

* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March 2020.