

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 May 2021 Quick Facts^{1/}

Visitor Expenditures:	Not available
Primary Purpose of Stay:	Pleasure (482) vs. MCI (6)
Average Length of Stay:	17.71 days
First Time Visitors:	28.0%
Repeat Visitors:	72.0%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{2/}	YTD May 2021P	YTD May 2020P	% change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions)	895.1	143.6*	NA	202.8	N/A ^{3/}	143.6 ⁺	N/A
Visitor Days	3,420,593	580,938	-83.0%	786,033	12,234	567,119	-97.8%
Arrivals	363,551	61,226	-83.2%	82,654	691	60,780	-98.9%
Average Daily Census	9,371	1,587	-83.1%	2,154	81	3,731	-97.8%
Per Person Per Day Spending (\$)	261.7	253.6*	NA	258.0	N/A ^{3/}	253.6 ⁺	N/A
Per Person Per Trip Spending (\$)	2,462.1	2,363.3*	NA	2,453.4	N/A ^{3/}	2,363.3 ⁺	N/A
Length of Stay (days)	9.41	9.49	0.8%	9.51	17.71	9.33	89.8%

^{*}2020 visitor spending data for Oceania were from January – March 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. Data for November and December 2020 were not available due to limited samples.

^{1/}Year-to-date 2020 visitor spending statistics presented were from January-March 2020 only.

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

^{3/}Visitor spending data for January-April 2021 were not available due to limited samples.

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Market Summary

In May 2021, the State's Safe Travels program was still underway, with most passengers arriving from out-of-state able to bypass the 10-day self-quarantine with a valid negative COVID-19 prior to departure. The counties of Hawai'i, Kaua'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in May. The CDC enforced restrictions on cruise ships through a "Conditional Sail Order."

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.

- Through the first five months of 2021, there were 213 visitors from Australia, compared to 50,072 visitors (-99.6%) in year-to-date 2020, versus 107,167 visitors (-99.8%) in year-to-date 2019. Visitors who came in the first five months of 2021 arrived on domestic flights. Direct flights from Australia continued to be suspended.
- Through the first five months of 2021, there were 478 visitors from New Zealand, compared to 10,708 visitors (-95.5%) in year-to-date 2020, versus 26,005 visitors (-98.2%) in year-to-date 2019. Visitors who came in May 2021 arrived on domestic flights. Direct flights from New Zealand continued to be suspended.
- There were no scheduled flights from Oceania during the first five months of 2021, compared to 328 scheduled flights and 95,737 seats in year-to-date 2020, versus 650 flights and 200,684 seats in year-to-date May 2019.
- 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

- Both the Trans-Tasman Bubble and Cook Islands/New Zealand Bubble were operating during May 2021, providing much needed tourism revenue for the industry. There was a hiccup late in the month due to a community outbreak in Melbourne, although this has only affected travel to and from the State of Victoria at this stage. The Melbourne outbreak has been reflected in a slight drop in consumer confidence as reported by researcher ANZ-Ray Morgan. Although more people do have a positive view of the next 18 months than negative.
- In May 2021, both Brand USA and the Visit USA organisations in Australia/New Zealand have announced the recommencement of activity, and with it, optimism. The Australian and New Zealand governments are extremely conscious of the importance of access between AU/NZ and the USA for both business and tourism and much work is taking place to ensure that the USA is one of the early markets to re-open.
- The rate of COVID-19 vaccinations continues to increase as we move towards the month of July when greater supplies will start arriving in the area. Thus far, close to 5.5 million vaccinations have been administered in Australia and 750,000 in New Zealand.
- Local currencies continued to be stable and strong when compared to the US\$. Both the AU\$ and NZ\$ continue to offer great value against the US\$ (AU\$1.00 = US\$0.77 and NZ\$1.00 = US\$0.72).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD May 2021P	YTD May 2020P	% change YTD
O'ahu	356,298	59,789	-83.2%	403	59,510	-99.3%
Mauie County	61,691	8,954	-85.5%	193	8,817	-97.8%
Maui	60,582	8,763	-85.5%	191	8,631	-97.8%
Moloka'i	4,680	834	-82.2%	0	830	-100.0%
Lāna'i	6,129	849	-86.1%	2	845	-99.8%
Kaua'i	32,168	5,074	-84.2%	82	5,043	-98.4%
Island of Hawai'i	47,411	7,669	-83.8%	129	7,610	-98.3%

Airlift

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	0	0	0	89,956	89,956	95,737	0	0	0	95,737	NA	NA	NA	NA	-6.0
Auckland	0	0	0	19,322	19,322	25,438	0	0	0	25,438	NA	NA	NA	NA	-24.0
Brisbane	0	0	0	10,842	10,842	10,008	0	0	0	10,008	NA	NA	NA	NA	8.3
Melbourne	0	0	0	6,700	6,700	10,385	0	0	0	10,385	NA	NA	NA	NA	-35.5
Sydney	0	0	0	53,092	53,092	49,906	0	0	0	49,906	NA	NA	NA	NA	6.4

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of May 25, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD May 2021P	YTD May 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	1,647	-76.5%	22	1,645	-98.7%
True Independent (Net)	214,622	38,401	-82.1%	605	37,986	-98.4%
Leisure vs business						
Pleasure (Net)	339,605	55,909	-83.5%	482	55,708	-99.1%
MCI (Net)	4,470	894	-80.0%	6	889	-99.3%
Convention/Conf.	3,214	714	-77.8%	0	713	-100.0%
Corp. Meetings	420	37	-91.2%	5	32	-84.0%
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 May 2021P	YTD May 2020P	% change YTD
1st timers (%)	47.0	45.7	-1.3	28.0	45.9	-17.8
Repeaters (%)	53.0	54.3	1.3	72.0	54.1	17.8

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD May 2021P	YTD May 2020P	% change YTD
State tax revenue generated* (\$ Millions) ^{4/}	104.48	16.76 ^{5/}	NA	NA	16.76 ^{5/}	NA

^{4/}State government tax revenue generated (direct, indirect, and induced)

^{5/}2020 state tax revenue generated statistics were calculated based visitor spending data from January – March 2020 only. Visitor spending data for the rest of 2020 were not available.