



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 September 2021 Quick Facts^{1/}

Visitor Expenditures:	\$7.0 million
Primary Purpose of Stay:	Pleasure (1,410) vs. MCI (48)
Average Length of Stay:	14.93 days
First Time Visitors:	31.2%
Repeat Visitors:	68.8%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions)	895.1	NA	NA	9.7	7.0	NA	NA
Visitor Days	3,420,593	479,534	-86.0%	39,996	29,226	471,787	-93.8%
Arrivals	363,551	50,710	-86.1%	2,685	1,957	50,405	-96.1%
Average Daily Census	9,371	1,310	-86.0%	110	107	1,722	-93.8%
Per Person Per Day Spending (\$)	261.7	NA	NA	242.1	240.1	NA	NA
Per Person Per Trip Spending (\$)	2,462.1	NA	NA	3,605.9	3,585.4	NA	NA
Length of Stay (days)	9.41	9.46	0.5%	14.90	14.93	9.36	59.6%

NA= Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

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

In September 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to a surge in Delta variant cases that has overburdened the state's health care facilities and resources. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

All arrivals in September 2021, including residents returning to Australia must show a negative PCR test taken within 72 hours before departure, before boarding. On arrival, all travelers must quarantine for 14 days at a designated facility at their own expense. Residents returning to New Zealand in September 2021 were required to complete 14 days of quarantine and test negative for COVID-19 (PCR or antigen) before entering the community.

- Through the first nine months of 2021, there were 563 visitors from Australia, compared to 41,238 visitors (-98.6%) in the first nine months of 2020, versus 219,205 visitors (-99.7%) in the first nine months of 2019. Visitors who came in the first nine months of 2021 arrived on domestic flights as direct flights from Australia continued to be suspended.
- Through the first nine months of 2021, there were 1,394 visitors from New Zealand, compared to 9,167 visitors (-84.8%) in the first nine months of 2020, versus 59,325 visitors (-97.7%) in the first nine months of 2019. Visitors who came in the first nine months of 2021 arrived on domestic flights as direct flights from New Zealand remained suspended.
- There were no scheduled flights from Oceania during the first nine months of 2021, compared to 328 scheduled flights and 95,737 seats in the first nine months of 2020, versus 1,227 flights and 376,768 seats in the first nine months of 2019.
- For all of 2020, arrivals from Oceania declined 86.1 percent to 50,710 visitors. Visitor days decreased 86.0 percent. The average daily census was 1,310 visitors, down 86.0 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 and 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 was 9,371 visitors 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

- The market is readying itself for the re-opening of international travel, thanks to a month of high-volume vaccination rates and a relaxing in government restrictions. The HTO office (and the wider industry) has noticed an increase in consumer excitement and enquiries around future travel opportunities.
- The COVID-19 elimination strategy is no longer realistic and instead, an easing of restrictions will be linked primarily on vaccination rates. Projected date for the targeted 80 percent of fully vaccinated adults could well be reached by the end of October 2021. At that threshold the government would allow the recommencement of overseas travel for vaccinated travellers.
- The NZ government has similarly fast-tracked the level of vaccinations which will help lift the restrictions around overseas travel.
- With the announcement of reopening plans by the Australian government, attention turned to both Qantas and Hawaiian Airlines around the return of flights to Honolulu. Both carriers have scheduled flights between Sydney and Honolulu commencing in the 2nd half of December 2021. These have been scheduled for some time, but now is the first time they have caught the attention of local media. The next few weeks will provide more clarity and hopefully confirmation around restart details.
- The Australian government has given the greenlight for vaccinated Australians to travel overseas in November 2021 (once the 80% threshold has been reached). Qantas has announced the re-start to the key destinations of London and Los Angeles in November which will be the start of a more widespread rollout.
- The outlook has markedly improved with conditions relaxing around international travel along with a market ready to travel and with the propensity to travel. NZ/AUS still have Hawai'i's three key airline partners active in the market (Qantas, Hawaiian and Air NZ) along with a stable exchange rate that is higher than pre-Covid levels.
- After a recent dip, both local currencies have recovered to once again be above pre-Covid levels against the USD (AUD.75cents & NZD.72cents).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
O'ahu	356,298	49,419	-86.1%	1,128	49,227	-97.7%
Maui County	61,691	7,371	-88.1%	558	7,255	-92.3%
Maui	60,582	7,202	-88.1%	535	7,086	-92.5%
Moloka'i	4,680	703	-85.0%	20	703	-97.1%
Lāna'i	6,129	718	-88.3%	22	718	-96.9%
Kaua'i	32,168	4,177	-87.0%	287	4,158	-93.1%
Island of Hawai'i	47,411	6,377	-86.5%	373	6,354	-94.1%

Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	0	0	0	10,141	10,141	95737	0	0	0	95,737	NA	NA	NA	NA	-89.4
Auckland	0	0	0	1,668	1,668	25438	0	0	0	25,438	NA	NA	NA	NA	-93.4
Brisbane	0	0	0	1,946	1,946	10008	0	0	0	10,008	NA	NA	NA	NA	-80.6
Melbourne	0	0	0	0	0	10385	0	0	0	10385	NA	NA	NA	NA	-100.0
Sydney	0	0	0	6,527	6,527	49906	0	0	0	49,906	NA	NA	NA	NA	-86.9

Source: DBEDT analysis based on scheduled Seats from Diao Mi flight schedules as of October 20, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	NA	50	NA	NA
True Independent (Net)	214,622	NA	NA	1,688	NA	NA
Leisure vs business						
Pleasure (Net)	339,605	46,357	-86.3%	1,410	46,179	-96.9%
MCI (Net)	4,470	717	-84.0%	48	713	-93.3%
Convention/Conf.	3,214	575	-82.1%	17	575	-97.1%
Corp. Meetings	420	33	-92.1%	20	30	-33.5%
Incentive	858	108	-87.4%	11	108	-89.4%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
1st timers (%)	47.0	NA	NA	31.2	NA	NA
Repeaters (%)	53.0	NA	NA	68.8	NA	NA

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	NA	0.82	NA	NA

^{2/}State government tax revenue generated (direct, indirect, and induced)