



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.

January 2021 Quick Facts¹

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (73) vs. MCI (1)
Average Length of Stay:	30.83 days
First Time Visitors:	37.6%
Repeat Visitors:	62.4%

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	2021* Forecast	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
Visitor Expenditures* (\$ Millions)	895.1	NA	NA	469.7	N/A	71.7	N/A
Visitor Days	3,420,593	580,938	-83.0%	1,881,413	3,761	272,970	-98.6%
Arrivals	363,551	61,226	-83.2%	197,627	122	29,597	-99.6%
Average Daily Census	9,371	1,587	-83.1%	5,155	121	8,805	-98.6%
Per Person Per Day Spending* (\$)	261.7	NA	NA	249.7	N/A	262.5	N/A
Per Person Per Trip Spending* (\$)	2,462.1	NA	NA	2,376.7	N/A	2,420.9	N/A
Length of Stay (days)	9.41	9.49	0.8%	9.52	30.83	9.22	234.3%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 2020).

¹ 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 January, 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. On December 2, 2020 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. However, starting January 5, 2021 Kaua'i County rejoined the Safe Travels program for inter-island arrivals, allowing inter-island travelers who have been in Hawai'i for more than three days to bypass the quarantine with a valid test result. Also starting January 5 on Kaua'i, trans-Pacific travelers were given the option of 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 January. 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 January 2021, 48 visitors (24,559 in January 2020) arrived from Australia and 74 visitors (5,038 in January 2020) came from New Zealand. Visitor spending data were not available.
- There were no scheduled flights from Oceania in January 2021, compared to 144 scheduled flights and 41,669 seats a year ago.
- In 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: Australia is entering 2021 well-placed for its economy to recover. The government has had great success limiting the impact of small COVID-19 outbreaks with any isolated cases being ringfenced quickly via a detailed contact tracing system. COVID-19 numbers are very low with transmissions within community close to zero. Our success in limiting the impacts of COVID-19 within the community has had a positive impact on consumer confidence which has remained high over the last few months as restrictions have eased.
- The Australian economy is recovering better than expected. New figures from the Australian Bureau of Statistics show the official unemployment rate fell in December to 6.6 per cent as 50,000 more people became employed, after unemployment reached a peak of 7.5 per cent in July. 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\$0.77.
- New Zealand: New Zealand continues to exhibit positive signs in the economy, due to the elimination of COVID-19 in the community. Unemployment figures just released show a drop to 4.9 per cent which is much better than economists had expected.
- 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\$0.73.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
O'ahu	356,298	59,789	-83.2%	69	28,946	-99.8%
Maui County	61,691	8,954	-85.5%	30	3,961	-99.2%
Maui	60,582	8,763	-85.5%	30	3,871	-99.2%
Moloka'i	4,680	834	-82.2%	0	390	-100.0%
Lāna'i	6,129	849	-86.1%	0	395	-100.0%
Kaua'i	32,168	5,074	-84.2%	14	2,350	-99.4%
Island of Hawai'i	47,411	7,669	-83.8%	12	3,952	-99.7%

Airlift

	2020	2019	% CHANGE
OCEANIA	95,737	494,582	-80.6
Auckland	25,438	125,300	-79.7
Brisbane	10,008	45,036	-77.8
Melbourne	10,385	52,595	-80.3
Sydney	49,906	271,651	-81.6

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	1,647	-76.5%	0	540	-100.0%
True Independent (Net)	214,622	38,401	-82.1%	111	17,850	-99.4%
Leisure vs business						
Pleasure (Net)	339,605	55,909	-83.5%	73	27,858	-99.7%
MCI (Net)	4,470	894	-80.0%	1	375	-99.7%
Convention/Conf.	3,214	714	-77.8%	0	335	-100.0%
Corp. Meetings	420	37	-91.2%	0	14	-100.0%
Incentive	858	143	-83.3%	1	27	-96.2%

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
1st timers (%)	47.0	45.7	-1.3	37.6	42.2	-4.6
Repeaters (%)	53.0	54.3	1.3	62.4	57.8	4.6

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Jan. 2021P	YTD Jan. 2020	% change YTD
State tax revenue generated* (\$ Millions)	104.48	NA	NA	NA	8.36	NA

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