



## 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 February 2021 Quick Facts<sup>1</sup>

Visitor Expenditures:	NA (Not available)
Primary Purpose of Stay:	Pleasure (114) vs. MCI (1)
Average Length of Stay:	29.20 days
First Time Visitors:	31.9%
Repeat Visitors:	68.1%

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	2021* Forecast	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
Visitor Expenditures* (\$ Millions)	895.1	NA	NA	202.8	N/A	114.5	N/A
Visitor Days	3,420,593	580,938	-83.0%	786,033	5,175	440,334	-98.8%
Arrivals	363,551	61,226	-83.2%	82,654	177	47,306	-99.6%
Average Daily Census	9,371	1,587	-83.1%	2,154	88	7,339	-98.8%
Per Person Per Day Spending* (\$)	261.7	NA	NA	258.0	N/A	260.0	N/A
Per Person Per Trip Spending* (\$)	2,462.1	NA	NA	2,453.4	N/A	2,420.0	N/A
Length of Stay (days)	9.41	9.49	0.8%	9.51	29.20	9.31	213.7%

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

<sup>1</sup> 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.

## Contact Information

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## Market Summary

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During February 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 Safe Travels program for trans-Pacific travelers, but inter-island travelers who had been in Hawai'i for more than three days could bypass the quarantine with a valid test result. Trans-Pacific travelers to Kaua'i 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 and Maui also had a partial quarantine in place in February. 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 two months 2021, 73 visitors arrived from Australia compared to 39,551 year-to-date 2020. The average daily census showed 57 visitors per day compared to 6,146 visitor per day in the first two months of 2020.
- There were 104 visitors from New Zealand versus 7,755 visitors in the first two months of 2020. The average daily census showed 31 visitors per day compared to 1,193 visitor per day in the first two months of 2020. Visitor spending data were not available.
- There were no scheduled flights from Oceania during the first two months of 2021, compared to 250 scheduled flights and 72,685 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

- Australia has kept its COVID-19 numbers within the community close to zero which has had a positive impact on consumer confidence. Its speedy response to outbreaks, large-scale government financial assistance and the general willingness of Australians to play their own role in bringing COVID-19 under control have all contributed to Australia's strong economic position. Consumer confidence is up and there is an increasing confidence about the performance of the Australian economy over the next year and next five years. The vaccination rollout will also help boost Consumer Confidence in the weeks and months ahead as increasing numbers of Australians are vaccinated.
- Australia's unemployment rate declined as a second round of central bank stimulus combined with a government spending accelerated the economy's recovery and further boosted hiring. The jobless rate fell to 6.4 percent from 6.6 percent, versus economists' estimate of 6.5 percent. Australia has recouped almost all the jobs lost in April/May 2020 at the depths of the recession and nationwide lockdown. 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 continues to manage COVID-19 via strict border controls, although February did see a small community outbreak that required a short lockdown in Auckland. This naturally has a negative effect on the economy, and the government is wanting to keep these outbreaks to a minimum. This will be helped by the vaccine rollout which began in February and will largely involve the Pfizer vaccine which the government has secured enough quantity for the whole population.
- The New Zealand dollar continues to trade strongly, at around US\$0.73.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
O'ahu	356,298	59,789	-83.2%	100	46,336	-99.8%
Mauī County	61,691	8,954	-85.5%	53	7,004	-99.2%
Mauī	60,582	8,763	-85.5%	53	6,819	-99.2%
Moloka'i	4,680	834	-82.2%	0	760	-100.0%
Lāna'i	6,129	849	-86.1%	0	775	-100.0%
Kaua'i	32,168	5,074	-84.2%	21	4,127	-99.5%
Island of Hawai'i	47,411	7,669	-83.8%	22	6,308	-99.7%

## 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 Feb. 2021P	YTD Feb. 2020P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	1,647	-76.5%	2	1,092	-99.8%
True Independent (Net)	214,622	38,401	-82.1%	162	29,390	-99.4%
Leisure vs business						
Pleasure (Net)	339,605	55,909	-83.5%	114	43,900	-99.7%
MCI (Net)	4,470	894	-80.0%	1	603	-99.8%
Convention/Conf.	3,214	714	-77.8%	0	509	-100.0%
Corp. Meetings	420	37	-91.2%	0	21	-100.0%
Incentive	858	143	-83.3%	1	73	-98.6%

## First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
1st timers (%)	47.0	45.7	-1.3	31.9	46.0	-14.1
Repeaters (%)	53.0	54.3	1.3	68.1	54.0	14.1

## Tax Revenue

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Feb. 2021P	YTD Feb. 2020P	% change YTD
State tax revenue generated* (\$ Millions)	104.48	NA	NA	NA	13.36	NA

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