



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 August 2021 Quick Facts^{1/}

Visitor Expenditures:	\$6.3 million
Primary Purpose of Stay:	Pleasure (1,271) vs. MCI (44)
Average Length of Stay:	15.36 days
First Time Visitors:	30.5%
Repeat Visitors:	69.5%

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions)	895.1	NA	NA	82.6	6.3	NA	NA
Visitor Days	3,420,593	479,534	-86.0%	305,677	26,532	469,309	-94.3%
Arrivals	363,551	50,710	-86.1%	33,184	1,728	50,360	-96.6%
Average Daily Census	9,371	1,310	-86.0%	837	109	1,923	-94.3%
Per Person Per Day Spending (\$)	261.7	NA	NA	270.3	238.4	NA	NA
Per Person Per Trip Spending (\$)	2,462.1	NA	NA	2,489.7	3,661.9	NA	NA
Length of Stay (days)	9.41	9.46	0.5%	9.21	15.36	9.32	64.8%

*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.

Contact Information

Hawai'i Tourism Authority: Maka Casson-Fisher, Brand Manager
Tel: (808) 973-2266
maka@gohta.net

Hawai'i Tourism Oceania:

Australia and New Zealand: Darragh Walshe, Account Manager
Tel: +64 (9) 977 2234
dwalshe@hawaiiitourism.co.nz

Market Summary

In August 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 August 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 August 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 eight months of 2021, there were 476 visitors from Australia, compared to 41,220 visitors (-98.8%) in the first eight months of 2020, versus 183,883 visitors (-99.7%) in the first eight months of 2019. Visitors who came in the first eight months of 2021 arrived on domestic flights as direct flights from Australia continued to be suspended.
- Through the first eight months of 2021, there were 1,252 visitors from New Zealand, compared to 9,139 visitors (-86.3%) in the first eight months of 2020, versus 50,987 visitors (-97.5%) in the first eight months of 2019. Visitors who came in the first eight 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 eight months of 2021, compared to 328 scheduled flights and 95,737 seats in the first eight months of 2020, versus 1,074 flights and 331,065 seats in the first eight 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 month of August 2021 saw an increase in positivity around the re-opening of borders. This was largely due to a change in rhetoric from local government moving from a former elimination approach to one designed about re-opening borders.
- With the record levels of vaccinations taking place in Australia and New Zealand the positive outlook includes the following:
 - Australia looks on track to reach the 80 percent vaccination threshold by November 2021 which will subsequently allow international travel to re-start for vaccinated travelers.
 - New Zealand look likely to reach their threshold by December 2021, with a relaxing of restrictions for vaccinated New Zealanders starting in the new year.
- The re-start of travel to approved countries will be part of a gradual opening, but USA has been highlighted as one of the priority countries.
- Qantas has seen searches on their website triple following their announcement that they plan to re-start overseas travel mid-December 2021.
- The exchange rates of both currencies remain strong against the USD (AUD.75cents & NZD.72cents).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% change YTD
O'ahu	356,298	49,419	-86.1%	982	49,206	-98.0%
Maui County	61,691	7,371	-88.1%	519	7,248	-92.8%
Maui	60,582	7,202	-88.1%	499	7,080	-93.0%
Moloka'i	4,680	703	-85.0%	17	702	-97.6%
Lāna'i	6,129	718	-88.3%	20	716	-97.2%
Kaua'i	32,168	4,177	-87.0%	262	4,154	-93.7%
Island of Hawai'i	47,411	6,377	-86.5%	322	6,334	-94.9%

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	27,706	27,706	95,737	0	0	0	95,737	-100.0	NA	NA	NA	-71.1
Auckland	0	0	0	1,668	1,668	25,438	0	0	0	25,438	-100.0	NA	NA	NA	-93.4
Brisbane	0	0	0	1,946	1,946	10,008	0	0	0	10,008	-100.0	NA	NA	NA	-80.6
Melbourne	0	0	0	6,700	6,700	10,385	0	0	0	10,385	-100.0	NA	NA	NA	-35.5
Sydney	0	0	0	17,392	17,392	49,906	0	0	0	49,906	-100.0	NA	NA	NA	-65.2

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of July 26, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	NA	47	NA	NA
True Independent (Net)	214,622	NA	NA	1,493	NA	NA
Leisure vs business						
Pleasure (Net)	339,605	46,357	-86.3%	1,271	46,175	-97.2%
MCI (Net)	4,470	717	-84.0%	44	713	-93.8%
Convention/Conf.	3,214	575	-82.1%	16	575	-97.3%
Corp. Meetings	420	33	-92.1%	17	30	-43.9%
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 Aug. 2021	YTD Aug. 2020	% change YTD
1st timers (%)	47.0	NA	NA	30.5	NA	NA
Repeaters (%)	53.0	NA	NA	69.5	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 Aug. 2021	YTD Aug. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	NA	0.74	NA	NA

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