



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 December 2021 Quick Facts^{1/}

Visitor Expenditures:	\$16.6 million
Primary Purpose of Stay:	Pleasure (4,998) vs. MCI (103)
Average Length of Stay:	13.17 days
First Time Visitors:	31.2%
Repeat Visitors:	68.8%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions)	895.1	NA	NA	22.4	16.6	NA	NA
Visitor Days	3,420,593	479,534	-86.0%	93,802	86,210	479,534	-82.0%
Arrivals	363,551	50,710	-86.1%	6,382	6,544	50,710	-87.1%
Average Daily Census	9,371	1,310	-86.0%	257	236	1,310	-82.0%
Per Person Per Day Spending (\$)	261.7	NA	NA	238.5	192.7	NA	NA
Per Person Per Trip Spending (\$)	2,462.1	NA	NA	3,505.7	2,538.7	NA	NA
Length of Stay (days)	9.41	9.46	0.5%	14.70	13.17	9.46	39.3%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 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 December 2021, domestic passengers 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. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 viral test result taken within 24 hours of travel or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight. 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.

In December 2021, all arrivals to Australia, including returning Australian residents, were required to be fully vaccinated and present a negative PCR test taken within 72 hours of arrival. Australian citizens who returned from high-risk countries affected by the Omicron variant, were required to undergo supervised quarantine for 14 days. All travelers entering New Zealand, including returning residents, were required to have a negative COVID-19 test taken within 72 hours of their flight. Most travelers (except those within quarantine-free travel zones i.e., Australia, the Cook Islands) were required to quarantine for 14 days at a designated facility.

- For all of 2021, 4,481 visitors arrived from Australia, of which 3,254 visitors came on international flights while 1,227 came on domestic flights. Direct flights from Australia resumed in December 2021. In comparison, there were 41,399 visitors (-89.2%) from Australia in 2020, versus 287,995 visitors (-98.4%) in 2019.
- In 2021, 2,063 visitors arrived from New Zealand on domestic flights as direct flights from New Zealand remained suspended. In comparison there were 9,310 visitors (-77.8%) from New Zealand in 2020, versus 75,556 visitors (-97.3%) in 2019.
- There were 19 scheduled flights and 5,396 seats from Oceania in 2021, compared to 328 scheduled flights and 95,737 seats in 2020, versus 1,623 flights and 482,717 seats in 2019.
- In 2020, arrivals from Oceania declined 86.1 percent to 50,710 visitors. Visitor days dropped 86.0 percent. The average daily census was 1,310 visitors, down 86.0 percent from 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

- Both Australia and New Zealand are approaching a significant achievement with both countries being over 90 percent fully vaccinated in the adult population and booster programs well underway in both countries.
- There is expected to be some easing of the return testing requirement in the coming weeks which will alleviate one of the current barriers to travel.
- Australia has now removed restrictions around international travel which has led to the restart of outbound travel. Each state still applies their own rules, with the most open being New South Wales (Sydney) and Victoria (Melbourne). Flights have begun returning ex these gateways, including Hawaiian Airlines and Qantas (both with services to Honolulu).
- Hawaiian Airlines Flights from Australia to Hawai'i, resumed on 15th December; HA is reporting good sales and load factors of around 70 percent.
- Due to the sudden increase in COVID-19 cases and an increase in travel restrictions, Qantas will be temporarily suspending HNL operations from January 31, 2022, to March 26, 2022 (remaining winter 2021 schedule), with plans to resume operations in April. Last flight before suspension will be on Saturday January 29, 2022.
- Air New Zealand has advised their schedule for recommencing flights to Hawai'i, commencing, April 14, 2022. Services will start at 3 x per week, increasing to daily.
- The outlook continues to be very positive, Hawai'i continues to rate as one of the most desired destinations to return to.
- Currently the rates are sitting at AUD.72cents & NZD.68cents against the USD which is nearer the lower end of the 12-month range – but still stronger than pre-Covid levels.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
O'ahu	356,298	49,419	-86.1%	5,090	49,419	-89.7%
Maui County	61,691	7,371	-88.1%	1,183	7,371	-84.0%
Maui	60,582	7,202	-88.1%	1,146	7,202	-84.1%
Moloka'i	4,680	703	-85.0%	21	703	-97.0%
Lāna'i	6,129	718	-88.3%	36	718	-95.0%
Kaua'i	32,168	4,177	-87.0%	671	4,177	-83.9%
Island of Hawai'i	47,411	6,377	-86.5%	604	6,377	-90.5%

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	5396	5,396	95737	0	0	0	95,737	-100.0	NA	NA	NA	-94.4
Auckland	0	0	0	0	0	25438	0	0	0	25,438	-100.0	NA	NA	NA	NA
Brisbane	0	0	0	0	0	10008	0	0	0	10,008	-100.0	NA	NA	NA	NA
Melbourne	0	0	0	0	0	10385	0	0	0	10385	-100.0	NA	NA	NA	NA
Sydney	0	0	0	5396	5,396	49906	0	0	0	49,906	-100.0	NA	NA	NA	-89.2

Source: DBEDT analysis based on scheduled Seats from Diao Mi flight schedules as of January 14, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	NA	72	NA	NA
True Independent (Net)	214,622	NA	NA	5,474	NA	NA
Leisure vs business						
Pleasure (Net)	339,605	46,357	-86.3%	4,998	46,357	-89.2%
MCI (Net)	4,470	717	-84.0%	103	717	-85.6%
Convention/Conf.	3,214	575	-82.1%	34	575	-94.0%
Corp. Meetings	420	33	-92.1%	37	33	12.1%
Incentive	858	108	-87.4%	37	108	-66.2%

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 Dec. 2021	YTD Dec. 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 Dec. 2021	YTD Dec. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	NA	1.94	NA	NA

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