



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 March 2022 Quick Facts^{1/}

Visitor Expenditures:	\$38.6 million
Primary Purpose of Stay:	Pleasure (12,436) vs. MCI (293)
Average Length of Stay:	10.30 days
First Time Visitors:	34.6%
Repeat Visitors:	65.4%

OCEANIA MMA (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	16.6	298.2	38.6	1.6	2283.8%
Visitor Days	3,420,593	479,534	86,210	1,083,103	144,984	7,147	1928.5%
Arrivals	363,551	50,710	6,544	110,655	14,081	320	4294.7%
Average Daily Census	9,371	1,310	236	2,967	1,611	79	1928.5%
Per Person Per Day Spending (\$)	261.7	NA	192.7	275.3	266.2	226.6	17.5%
Per Person Per Trip Spending (\$)	2,462.1	NA	2,538.7	2,694.8	2,741.3	5,053.9	-45.8%
Length of Stay (days)	9.41	9.46	13.17	9.79	10.30	22.31	-53.8%

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.
*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

^{1/} 2022 and 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

Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. Due to concerns about the rapid surge of COVID cases worldwide and the limitations of Hawai'i's health care system, on March 17, 2020 Hawai'i Gov. David Ige asked visitors to postpone their trips for at least 30 days. The counties also began issuing stay-at-home orders. On March 26, 2020, the state implemented a 14-day mandatory travel quarantine. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. This continued until mid-October 2020, when the state initiated the Safe Travels program, which allowed trans-Pacific travelers to bypass the quarantine if they had a valid negative test for COVID-19.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

- Through the first quarter of 2022, there were 13,282 visitors from Australia, compared to 57,361 visitors in the first quarter of 2019.
- Through the first quarter of 2022 there were 799 visitors from New Zealand, compared to 11,237 visitors in the first quarter of 2019.
- There were 95 scheduled flights and 27,873 seats from Sydney Australia in the first quarter of 2022. There were 375 flights with 115,945 seats from Australia and New Zealand in the first quarter of 2019.
- 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, and 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, and 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, and 1,623 flights and 482,717 seats in 2019.

Market Conditions

- Optimism is returning to both Australia and New Zealand around COVID-19 and travel.
- Travel Trade events & activities have resumed in Australia. Confidence in booking international travel is returning with fewer travel restrictions & requirements.
- Sustainability is a trend, with travel agents reporting that consumers are becoming more interested in taking a trip that has positive environmental benefits.
- Now that travel restrictions have been lifted in New Zealand, the pent-up demand is seeing a large volume of international bookings.
- The cruise market is coming back very strong with bookings being made 2-3 years in advance. Cruise Travel will resume in Australia beginning April 17.
- Qantas resumed SYD-HNL on March 27, 2022. Hawaiian Airlines increased non-stop flights from SYD-HNL to five times a week from mid-April.
- Hawaiian Airlines will resume non-stop flights, three times a week, between AKL-HNL beginning July 4, 2022.
- Currently, the exchange rates remain at AUD.74cents and NZD.68cents against the USD.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
O'ahu	356,298	49,419	5,090	13,304	172	7621.8%
Maui County	61,691	7,371	1,183	1,916	95	1907.1%
Maui	60,582	7,202	1,146	1,868	95	1856.6%
Moloka'i	4,680	703	21	23	0	NA
Lāna'i	6,129	718	36	107	0	NA
Kaua'i	32,168	4,177	671	781	34	2202.3%
Island of Hawai'i	47,411	6,377	604	1,812	58	3024.1%

Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	27,873	57,665	82,789	87,114	255,441	0	0	0	5,396	5,396	NA	NA	NA	1514.4	4633.9
Auckland	0	0	21724	26163	47,887	0	0	0	0	0	NA	NA	NA	NA	NA
Brisbane	2,010	8,710	9,715	8,710	29,145	0	0	0	0	0	NA	NA	NA	NA	NA
Melbourne	25,863	48,955	51,350	52,241	178,409	0	0	0	5,396	5,396	NA	NA	NA	868.1	3206.3
Sydney	27,873	57,665	82,789	87,114	255,441	0	0	0	5,396	5,396	NA	NA	NA	1514.4	4633.9

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of April 26, 2022, subject to change.

Scheduled flights	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	95	190	278	291	854	0	0	0	19	19	NA	NA	NA	1431.6	4394.7
Auckland			77	90	167			0	0	0			NA	NA	NA
Brisbane	6	26	29	26	87	0	0	0	0	0	NA	NA	NA	NA	NA
Melbourne	89	164	172	175	600	0	0	0	19	19	NA	NA	NA	821.1	3057.9
Sydney	95	190	278	291	854	0	0	0	19	19	NA	NA	NA	1431.6	4394.7

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of April 26, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	72	212	12	1621.6%
True Independent (Net)	214,622	NA	5,474	11,440	287	3880.9%
Leisure vs business						
Pleasure (Net)	339,605	46,357	4,998	12,436	210	5825.4%
MCI (Net)	4,470	717	103	293	1	28494.7%
Convention/Conf.	3,214	575	34	106	0	NA
Corp. Meetings	420	33	37	26	0	NA
Incentive	858	108	37	206	1	19982.9%

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	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
1st timers (%)	47.0	NA	31.2	34.6	28.8	5.8
Repeaters (%)	53.0	NA	68.8	65.4	71.2	-5.8

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	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	1.94	4.48	0.19	2268.9%

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