



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 November 2022 Quick Facts^{1/}

Visitor Expenditures:	\$440.0 million
Primary Purpose of Stay:	Pleasure (145,741) vs. MCI (5,126)
Average Length of Stay:	9.73 days
First Time Visitors:	36.8%
Repeat Visitors:	63.2%

OCEANIA MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	409.2	440.0	10.4	4145.7%
Visitor Days	3,420,593	479,534	84,413	1,472,261	1,540,953	42,732	3506.1%
Arrivals	363,551	50,710	6,524	150,711	158,355	2,884	5390.7%
Average Daily Census	9,371	1,310	231	4,034	4,614	128	3506.1%
Per Person Per Day Spending (\$)	261.7	NA	235.1	277.9	285.6	242.5	17.7%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,715.0	2,778.9	3,593.7	-22.7%
Length of Stay (days)	9.41	9.46	12.94	9.77	9.73	14.82	-34.3%

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.

*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 3, 2022).

^{1/} 2022 visitor data are preliminary. 2021, 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 COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first 11 months of 2022, there were 134,086 visitors from Australia compared to 264,789 visitors (-49.4%) in the first 11 months of 2019.
- Through the first 11 months of 2022, there were 24,269 visitors from New Zealand compared to 69,979 visitors (-65.3%) in the first 11 months of 2019.
- Through the first 11 months of 2022, there were 593 scheduled flights and 178,553 seats from Australia; and 129 scheduled flights and 36,642 seats from New Zealand. Through the first 11 months of 2019, there were 1,088 flights (-45.5%) with 339,403 seats (-47.4%) from Australia; and 399 flights (-67.7%) and 114,924 seats (-68.1%) from New Zealand.
- For all of 2021, 4,366 visitors arrived from Australia, of which 3,137 visitors came on international flights while 1,229 came on domestic flights. Direct flights from Australia resumed in December 2021. In comparison, there were 41,399 visitors (-89.5%) from Australia in 2020, and 287,995 visitors (-98.5%) in 2019.
- In 2021, 2,158 visitors arrived from New Zealand on domestic flights as direct flights from New Zealand remained suspended. In comparison there were 9,310 visitors (-76.8%) from New Zealand in 2020, and 75,556 visitors (-97.1%) 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

- Unemployment in November 2022 remains at an all-time low in Australia and New Zealand at 3.5 percent and 3.3 percent, respectively.
- Cost of living continues to increase in both Australia and New Zealand putting more financial pressure on consumers.
- The Reserve Bank in New Zealand increased the cash rate by a record 75points in an attempt to keep control over inflation.
- The AUD and NZD increased in value against the USD. Exchange rates, at the end of November 2022, were sitting at 68 cents (AUD) and 64 cents (NZD) to one USD.
- Booking patterns remain the same with flight prices impacting level of bookings and how far in advance consumers are booking.
- Jetstar continues to have operational problems with numerous delays and cancellations throughout the month of November 2022.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
O'ahu	356,298	49,419	4,847	154,549	1,762	8669.4%
Maui County	61,691	7,371	1,161	22,667	755	2900.7%
Maui	60,582	7,202	1,125	22,098	720	2970.6%
Moloka'i	4,680	703	21	1,063	20	5204.0%
Lāna'i	6,129	718	36	1,451	36	3979.5%
Kaua'i	32,168	4,177	572	9,352	395	2266.8%
Island of Hawai'i	47,411	6,377	672	15,510	501	2996.2%

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	27873	55415	76849	84693	244,830	0	0	0	5396	5,396	NA	NA	27873	55415	76849
Auckland	0	0	21,643	23,445	45,088	0	0	0	0	0	NA	NA	NA	NA	21,643
Melbourne	2010	8040	8375	8710	27,135	0	0	0	0	0	NA	NA	2010	8040	8375
Sydney	25,863	47,375	46,831	52,538	172,607	0	0	0	5,396	5,396	NA	NA	25,863	47,375	46,831

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of December 22, 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	183	260	283	821	0	0	0	19	19	NA	NA	NA	1389.5	4221.1
Auckland			77	81	158				0	0			NA	NA	NA
Melbourne	6	24	25	26	81	0	0	0	0	0			NA	NA	NA
Sydney	89	159	158	176	582	0	0	0	19	19	NA	NA	NA	826.3	2963.2

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of December 22, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	7,017	NA	72	2,177	69	3049.8%
True Independent (Net)	214,622	NA	5,956	118,926	2,531	4597.9%
Leisure vs Business						
Pleasure (Net)	339,605	46,357	4,978	145,741	2,013	7138.2%
MCI (Net)	4,470	717	128	5,126	100	5026.2%
Convention/Conf.	3,214	575	34	1,694	34	4820.5%
Corp. Meetings	420	33	61	2,540	35	7136.3%
Incentive	858	108	38	1,051	36	2851.7%

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	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
First Time Visitors (%)	47.0	NA	57.1	36.8	32.7	4.1
Repeat Visitors (%)	53.0	NA	42.9	63.2	67.3	-4.1

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	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	51.05	1.21	4119.3%

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