



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 April 2022 Quick Facts^{1/}

Visitor Expenditures:	\$72.4 million
Primary Purpose of Stay:	Pleasure (24,586) vs. MCI (427)
Average Length of Stay:	10.0 days
First Time Visitors:	34.2%
Repeat Visitors:	65.8%

OCEANIA MMA (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	16.6	298.2	72.4	2.2	3175.8%
Visitor Days	3,420,593	479,534	86,210	1,083,103	270,122	9,492	2745.8%
Arrivals	363,551	50,710	6,544	110,655	27,015	470	5653.3%
Average Daily Census	9,371	1,310	236	2,967	2,251	79	2745.8%
Per Person Per Day Spending (\$)	261.7	NA	192.7	275.3	267.9	232.8	15.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	2,538.7	2,694.8	2,679.2	4,705.5	-43.1%
Length of Stay (days)	9.41	9.46	13.17	9.79	10.00	20.21	-50.5%

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, 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 April 2022, there were no travel restrictions for passengers arriving on U.S. domestic flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

- Through the first four months of 2022, there were 25,887 visitors from Australia, compared to 80,806 visitors in the first four months of 2019.
- Through the first four months of 2022 there were 1,128 visitors from New Zealand, compared to 18,593 visitors in the first four months of 2019.
- Through the first four months of 2022, there were 159 scheduled flights and 47,223 seats from Australia. Through the first four months of 2019, there were 372 flights with 117,145 seats from Australia, 142 flights and 41,634 seats from New Zealand.
- 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

- Both Australia and New Zealand are seeing a sharp rise in the cost of living, with recent inflation rate announcements reflecting the highest levels for several decades. New Zealand has reached 6.9 percent inflation and Australia 5.1 percent.
- Cruise ships were allowed to return to Australian waters starting April 17, 2022, concluding a two-year ban due to the coronavirus pandemic.
- Around 50 percent of consumers are booking very close to their departure date (within 4 weeks), while the other half are booking way in advance (6 months +). This indicates there is still uncertainty around booking and travelling.
- Sustainable travel continues to be a trend and is becoming increasingly important to consumers.
- New Zealand flights still due to restart on July 4th (Hawaiian Airlines start 7/4/2022 and Air New Zealand start 7/5/2022).
- Exchange rate AUD 0.72 and NZD 0.65 against the USD.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
O'ahu	356,298	49,419	5,090	25,962	261	9854.8%
Maui County	61,691	7,371	1,183	3,789	136	2693.4%
Maui	60,582	7,202	1,146	3,671	134	2649.4%
Moloka'i	4,680	703	21	132	0	#DIV/0!
Lāna'i	6,129	718	36	127	2	5916.5%
Kaua'i	32,168	4,177	671	1,499	43	3364.5%
Island of Hawai'i	47,411	6,377	604	2,904	93	3021.3%

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 Apr. 2022P	YTD Apr. 2021P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	72	288	19	1446.4%
True Independent (Net)	214,622	NA	5,474	21,645	405	5240.5%
Leisure vs business						
Pleasure (Net)	339,605	46,357	4,998	24,586	314	7729.6%
MCI (Net)	4,470	717	103	427	6	6760.3%
Convention/Conf.	3,214	575	34	142	0	#DIV/0!
Corp. Meetings	420	33	37	90	5	1632.6%
Incentive	858	108	37	245	1	23847.7%

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	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
1st timers (%)	47.0	NA	31.2	34.2	27.0	7.2
Repeaters (%)	53.0	NA	68.8	65.8	73.0	-7.2

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.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	1.94	8.40	0.26	3155.4%

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