



# 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 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$9.4 million
Primary Purpose of Stay:	Pleasure (1,911) vs. MCI (98)
Average Length of Stay:	14.67 days
First Time Visitors:	30.5%
Repeat Visitors:	69.5%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
OCEANIA MMA (by Air)							
Visitor Expenditures (\$ Millions)	895.1	NA	NA	9.7	9.4	NA	NA
Visitor Days	3,420,593	479,534	-86.0%	39,996	39,354	476,695	-91.7%
Arrivals	363,551	50,710	-86.1%	2,685	2,683	50,580	-94.7%
Average Daily Census	9,371	1,310	-86.0%	110	118	1,423	-91.7%
Per Person Per Day Spending (\$)	261.7	NA	NA	242.1	239.3	NA	NA
Per Person Per Trip Spending (\$)	2,462.1	NA	NA	3,605.9	3,510.2	NA	NA
Length of Stay (days)	9.41	9.46	0.5%	14.90	14.67	9.42	55.6%

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.

<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

<sup>1/</sup> 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

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## Market Summary

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In November 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. 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.

On November 1, 2021, travel restrictions were eased for returning Australian residents. Fully vaccinated individuals were no longer required to quarantine for 14 days at a designated facility at their own expense. However, effective November 29, the government reintroduced travel restrictions for individuals returning from countries where the Omicron variant was detected. Australian residents arriving from these countries were required to go into supervised quarantine for 14 days subject to jurisdictional arrangements. All arrivals from other international countries need to isolate for 72 hours and get tested as a precaution. In November 2021, all travelers entering New Zealand, including returning residents were required to have a COVID-19 test taken and a negative result returned within 72 hours of their flight. Most travelers, except those from a quarantine-free travel zone (Australia and the Cook Islands), arriving in New Zealand are required to go into a Managed Isolation or Quarantine (MIQ) facility for a minimum of 7 days.

- Through the first 11 months of 2021, there were 877 visitors from Australia, compared to 41,335 visitors (-97.9%) in the first 11 months of 2020, versus 264,789 visitors (-99.7%) in the first 11 months of 2019. Visitors who came in the first 11 months of 2021 arrived on domestic flights as direct flights from Australia continued to be suspended.
- Through the first 11 months of 2021, there were 1,806 visitors from New Zealand, compared to 9,245 visitors (-80.5%) in the first 11 months of 2020, versus 69,979 visitors (-97.4%) in the first 11 months of 2019. Visitors who came in the first 11 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 11 months of 2021, compared to 328 scheduled flights and 95,737 seats in the first 11 months of 2020, versus 1,487 flights and 454,327 seats in the first 11 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

- Australia has now removed restrictions around international travel which has led to the restart of outbound travel.
- Discussions with trade partners over the month revealed that Hawai'i continues to rate as one of the most desired destinations to return to.
- Both Australia and New Zealand are approaching a significant achievement with both countries being only 1 percent away from a 90 percent fully vaccinated adult population. This is very significant and is fundamental to the re-opening of domestic travel as well as the staggered plan for international tourism.
- There is excellent interest and excitement around the upcoming re-start of flights from Sydney to Honolulu on December 15, 2021.
- Omicron has added some nervousness and additional logistics for travelers. In particular around the shortened testing time frames.
- There has been downward pressure on both currencies over the month. Currently the rates are sitting at AUD.71cents & 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 Nov. 2021	YTD Nov. 2020	% change YTD
O'ahu	356,298	49,419	-86.1%	1,599	49,337	-96.8%
Mauie County	61,691	7,371	-88.1%	732	7,323	-90.0%
Maui	60,582	7,202	-88.1%	696	7,154	-90.3%
Moloka'i	4,680	703	-85.0%	20	703	-97.1%
Lāna'i	6,129	718	-88.3%	36	718	-95.0%
Kaua'i	32,168	4,177	-87.0%	393	4,172	-90.6%
Island of Hawai'i	47,411	6,377	-86.5%	490	6,365	-92.3%

## Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>10,141</b>	<b>10,141</b>	<b>95737</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>95,737</b>	NA	NA	NA	NA	<b>-89.4</b>
Auckland	0	0	0	1,668	1,668	25438	0	0	0	25,438	NA	NA	NA	NA	-93.4
Brisbane	0	0	0	1,946	1,946	10008	0	0	0	10,008	NA	NA	NA	NA	-80.6
Melbourne	0	0	0	0	0	10385	0	0	0	10385	NA	NA	NA	NA	-100.0
Sydney	0	0	0	6,527	6,527	49906	0	0	0	49,906	NA	NA	NA	NA	-86.9

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of October 20, 2021, subject to change.

## Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	NA	69	NA	NA
True Independent (Net)	214,622	NA	NA	2,329	NA	NA
Leisure vs business						
Pleasure (Net)	339,605	46,357	-86.3%	1,911	46,280	-95.9%
MCI (Net)	4,470	717	-84.0%	98	714	-86.3%
Convention/Conf.	3,214	575	-82.1%	34	575	-94.0%
Corp. Meetings	420	33	-92.1%	34	31	9.8%
Incentive	858	108	-87.4%	35	108	-68.1%

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.

## First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 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 Nov. 2021	YTD Nov. 2020	% change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	NA	1.10	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced)