



# 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 June 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$148.9 million
Primary Purpose of Stay:	Pleasure (49,951) vs. MCI (1,121)
Average Length of Stay:	9.82 days
First Time Visitors:	35.1%
Repeat Visitors:	64.9%

OCEANIA MMA (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD June 2022P	YTD June 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	16.6	298.2	148.9	3.9	3764.2%
Visitor Days	3,420,593	479,534	86,210	1,083,103	538,839	16,353	3195.1%
Arrivals	363,551	50,710	6,544	110,655	54,855	969	5562.8%
Average Daily Census	9,371	1,310	236	2,967	2,977	90	3195.1%
Per Person Per Day Spending (\$)	261.7	NA	192.7	275.3	276.4	235.7	17.3%
Per Person Per Trip Spending (\$)	2,462.1	NA	2,538.7	2,694.8	2,714.6	3,978.2	-31.8%
Length of Stay (days)	9.41	9.46	13.17	9.79	9.82	16.88	-41.8%

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).

<sup>1/</sup> 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.

## Contact Information

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## Market Summary

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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 June 2022, passengers arriving on direct international flights through June 11 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. This requirement was lifted on June 12, 2022. There were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland.

- Through the first half of 2022, there were 52,931 visitors from Australia, compared to 132,710 visitors in the first half of 2019.
- Through the first half of 2022 there were 1,923 visitors from New Zealand, compared to 33,167 visitors in the first half of 2019.
- Through the first half of 2022, there were 278 scheduled flights and 83,288 seats from Australia. Through the first half of 2019, there were 574 flights with 181,063 seats from Australia, and 207 flights and 60,028 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

- The USA remains incredibly popular among Australian visitors with California being the top choice, closely followed by The Hawaiian Islands.
- The latest data shows that the conflict in Ukraine has not stopped the numbers of Australians travelling to spend summer in Europe.
- Travelling with purpose continues to be an emerging trend. Bucket-list trips and “dream destinations” set to continue for remainder of 2022.
- New Australian Bureau of Statistics (ABS) data shows the number of trips in and out of Australia has almost doubled since March 2022.
- New Zealand’s outbound market, while later to restart, is now on a significant rise due to the removal of restrictions such as pre-travel return testing.
- Traditional booking lead times continue to shift as new factors emerge, including the rising cost of flights. Consumers seem to be waiting later in the hope that they will get a better deal.
- The outlook for the labor market is broadly unchanged, with unemployment expected to continue to decline (currently 4%) and wage growth to pick up.
- GDP is now expected to grow by 2.7 percent over 2022 (was 3.4%). Inflation is accelerating, which is putting pressure on the cost of living.
- The June ANZ Business Outlook survey in New Zealand showed business main concerns are linked to inflation and labor shortages.
- The respective exchange rate values ended the month slightly lower against the USD at 69cents (AUD) and 62cents (NZD)

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021P	YTD June 2022P	YTD June 2021P	% change YTD
O'ahu	356,298	49,419	5,090	53,100	551	9536.8%
Maui County	61,691	7,371	1,183	7,618	281	2606.8%
Maui	60,582	7,202	1,146	7,414	266	2690.4%
Moloka'i	4,680	703	21	251	12	2070.6%
Lāna'i	6,129	718	36	402	16	2449.4%
Kaua'i	32,168	4,177	671	3,470	145	2285.7%
Island of Hawai'i	47,411	6,377	604	5,665	196	2793.9%

## 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
<b>OCEANIA</b>	<b>27,873</b>	<b>56,755</b>	<b>80,531</b>	<b>87,411</b>	<b>252,570</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5,396</b>	<b>5,396</b>	NA	NA	NA	1519.9	4580.7
Auckland	0	0	21,697	26,163	47,860	0	0	0	0	0	NA	NA	NA	#DIV/0!	#DIV/0!
Brisbane	2,010	8,375	8,710	8,710	27,805	0	0	0	0	0	NA	NA	NA	#DIV/0!	#DIV/0!
Melbourne	25,863	48,380	50,124	52,538	176,905	0	0	0	5,396	5,396	NA	NA	NA	873.6	3178.4
Sydney	<b>27,873</b>	<b>56,755</b>	<b>80,531</b>	<b>87,411</b>	<b>252,570</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5,396</b>	<b>5,396</b>	NA	NA	NA	1519.9	4580.7

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of June 24, 2022, subject to change.

Scheduled flights	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>95</b>	<b>187</b>	<b>271</b>	<b>292</b>	<b>845</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>19</b>	NA	NA	NA	1436.8	4347.4
Auckland			77	90	167	0	0	0	0	0	NA	NA	NA	#DIV/0!	#DIV/0!
Brisbane	6	25	26	26	83	0	0	0	0	0	NA	NA	NA	#DIV/0!	#DIV/0!
Melbourne	89	162	168	176	595	0	0	0	19	19	NA	NA	NA	826.3	3031.6
Sydney	<b>95</b>	<b>187</b>	<b>271</b>	<b>292</b>	<b>845</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>19</b>	NA	NA	NA	1436.8	4347.4

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of June 24, 2022, subject to change.

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

OCEANIA MMA (by Air)	2019	2020	2021P	YTD June 2022P	YTD June 2021P	% change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	72	850	23	3624.4%
True Independent (Net)	214,622	NA	5,474	42,654	866	4826.4%
Leisure vs business						
Pleasure (Net)	339,605	46,357	4,998	49,951	701	7023.8%
MCI (Net)	4,470	717	103	1,121	22	5000.4%
Convention/Conf.	3,214	575	34	542	12	4587.1%
Corp. Meetings	420	33	37	229	7	3039.9%
Incentive	858	108	37	458	3	14696.3%

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 June 2022P	YTD June 2021P	% change YTD
1st timers (%)	47.0	NA	31.2	35.1	30.5	4.6
Repeaters (%)	53.0	NA	68.8	64.9	69.5	-4.6

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 June 2022P	YTD June 2021P	% change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	1.94	17.27	0.45	3740.1%

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