



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

Visitor Expenditures:	\$203.2 million
Primary Purpose of Stay:	Pleasure (68,481) vs. MCI (1,261)
Average Length of Stay:	9.77 days
First Time Visitors:	35.4%
Repeat Visitors:	64.6%

OCEANIA MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	298.2	203.2	5.6	3550.1%
Visitor Days	3,420,593	479,534	84,413	1,083,103	731,096	23,268	3042.1%
Arrivals	363,551	50,710	6,524	110,655	74,839	1,404	5229.1%
Average Daily Census	9,371	1,310	231	2,967	3,449	110	3042.1%
Per Person Per Day Spending (\$)	261.7	NA	235.1	275.3	277.9	239.3	16.2%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,694.8	2,715.1	3,964.0	-31.5%
Length of Stay (days)	9.41	9.46	12.94	9.79	9.77	16.57	-41.0%

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 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.

## 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 July 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 seven months of 2022, there were 68,591 visitors from Australia, compared to 159,887 visitors in the first seven months of 2019.
- Through the first seven months of 2022 there were 6,249 visitors from New Zealand, compared to 43,421 visitors in the first seven months of 2019.
- Through the first seven months of 2022, there were 343 scheduled flights and 102,935 seats from Australia. After being suspended since April 2020, direct service from New Zealand resumed in July 2022 with 25 scheduled flights and 6,941 seats. Through the first seven months of 2019, there were 684 flights with 216,043 seats from Australia, and 257 flights and 74,462 seats 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

- The outlook for the labor market is broadly unchanged, with unemployment expected to continue to decline (currently 4%) and wage growth to pick up.
- The rising cost of airfare means that people are tending to wait until much closer to the travel date hoping to find a more competitive fare, skewing the tradition booking pattern.
- Fiji, Thailand and Bali remain strong competitors.
- Partners are reporting that the cost of the airfare to Hawai'i is having a huge impact on conversion, especially for partners that package air with land.
- The Hawai'i airfare challenge isn't the same in the New Zealand market with Hawai'i airfare increases on a much smaller scale than many other destinations.
- The respective exchange rate values ended the month of July 2022, slightly higher against the USD at 70cents (AUD) and 63cents (NZD).

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	356,298	49,419	4,847	72,657	818	8782.6%
Maui County	61,691	7,371	1,161	11,106	415	2574.3%
Maui	60,582	7,202	1,125	10,818	397	2622.0%
Moloka'i	4,680	703	21	328	16	1974.2%
Lāna'i	6,129	718	36	567	19	2908.9%
Kaua'i	32,168	4,177	572	4,250	191	2128.3%
Island of Hawai'i	47,411	6,377	672	7,363	260	2732.5%

## 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	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	7,017	NA	72	901	39	2223.4%
True Independent (Net)	214,622	NA	5,956	58,836	1,239	4647.9%
Leisure vs business						
Pleasure (Net)	339,605	46,357	4,978	68,481	1,004	6721.1%
MCI (Net)	4,470	717	128	1,261	26	4731.4%
Convention/Conf.	3,214	575	34	638	12	5410.9%
Corp. Meetings	420	33	61	246	11	2050.7%
Incentive	858	108	38	486	3	15637.7%

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 July 2022P	YTD July 2021	% Change YTD
1st timers (%)	47.0	NA	57.1	35.4	29.6	5.7
Repeaters (%)	53.0	NA	42.9	64.6	70.4	-5.7

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.

## Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	23.57	0.65	3527.4%

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