



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

Visitor Expenditures:	\$316.4 million
Primary Purpose of Stay:	Pleasure (105,845) vs. MCI (2,347)
Average Length of Stay:	9.73 days
First Time Visitors:	36.6%
Repeat Visitors:	63.4%

OCEANIA MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	409.2	316.4	7.7	3991.9%
Visitor Days	3,420,593	479,534	84,413	1,472,261	1,121,414	31,812	3425.2%
Arrivals	363,551	50,710	6,524	150,711	115,281	2,097	5396.6%
Average Daily Census	9,371	1,310	231	4,034	4,108	117	3425.2%
Per Person Per Day Spending (\$)	261.7	NA	235.1	277.9	282.1	243.1	16.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,715.0	2,744.5	3,686.6	-25.6%
Length of Stay (days)	9.41	9.46	12.94	9.77	9.73	15.17	-35.9%

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).

<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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**Hawai'i Tourism Authority:** Maka Casson-Fisher, Brand Manager  
Tel: (808) 973-2266  
[maka@gohta.net](mailto:maka@gohta.net)

### Hawai'i Tourism Oceania:

Australia and New Zealand: Darragh Walshe, Account Manager  
Tel: +64 (9) 977 2234  
[dwalshe@hawaiiitourism.co.nz](mailto:dwalshe@hawaiiitourism.co.nz)

## Market Summary

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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 September 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 nine months of 2022, there were 100,102 visitors from Australia compared to 219,205 visitors in the first nine months of 2019.
- Through the first nine months of 2022, there were 15,178 visitors from New Zealand compared to 59,325 visitors in the first nine months of 2019.
- Through the first nine months of 2022, there were 461 scheduled flights and 138,494 seats from Australia; and 77 scheduled flights and 21,643 seats from New Zealand. Through the first nine months of 2019, there were 893 flights with 280,708 seats from Australia; and 334 flights and 96,060 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

- Australia recorded an annual inflation rate of 6.8 percent in August 2022, down from 7 percent in July.
- Cost of living continues to increase in both Australia and New Zealand.
- The record low for GBP/USD as well as a broadly stronger USD resulted in softer AUD & NZD. The exchange rates were sitting at 64 cents (AUD) and 58 cents (NZD) to one USD at the end of September 2022.
- Disruption and long queues at airports seem to have calmed down this month which will increase travel confidence.
- Booking patterns remain the same for both Australia and New Zealand with flight prices impacting level of bookings and how far in advance consumers are booking.
- August 2022 visitor numbers from Oceania continue to track upward, now over 61 percent of what they were in 2019 – which was a near record year.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
O'ahu	356,298	49,419	4,847	112,256	1,244	8923.2%
Maui County	61,691	7,371	1,161	16,485	575	2765.7%
Maui	60,582	7,202	1,125	16,050	552	2807.2%
Moloka'i	4,680	703	21	673	20	3256.8%
Lāna'i	6,129	718	36	948	22	4206.4%
Kaua'i	32,168	4,177	572	6,535	289	2160.5%
Island of Hawai'i	47,411	6,377	672	10,902	377	2793.4%

## 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>27873</b>	<b>55415</b>	<b>79194</b>	<b>84693</b>	<b>247,175</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5396</b>	<b>5,396</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>1469.6</b>	<b>4480.7</b>
Auckland	0	0	21,643	23,445	45,088	0	0	0	0	0	0	0	NA	NA	NA
Brisbane	2010	8040	8710	8710	27,470	0	0	0	0	0	0	0	NA	NA	NA
Melbourne	25,863	47,375	48,841	52,538	174,617	0	0	0	5,396	5,396	NA	NA	NA	873.6	3136.0
Sydney	<b>27873</b>	<b>55415</b>	<b>79194</b>	<b>84693</b>	<b>247,175</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5396</b>	<b>5,396</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>1469.6</b>	<b>4480.7</b>

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of September 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
<b>OCEANIA</b>	<b>95</b>	<b>183</b>	<b>267</b>	<b>283</b>	<b>828</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>19</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>1389.5</b>	<b>4257.9</b>
Auckland	0	0	77	81	158	0	0	0	0	0	0	0	NA	NA	NA
Brisbane	6	24	26	26	82	0	0	0	0	0	0	0	NA	NA	NA
Melbourne	89	159	164	176	588	0	0	0	19	19	NA	NA	NA	826.3	2994.7
Sydney	<b>95</b>	<b>183</b>	<b>267</b>	<b>283</b>	<b>828</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>19</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>1389.5</b>	<b>4257.9</b>

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

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

OCEANIA MMA (by Air)	2019	2020	2021	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	7,017	NA	72	1,482	50	2882.6%
True Independent (Net)	214,622	NA	5,956	87,816	1,830	4699.2%
Leisure vs Business						
Pleasure (Net)	339,605	46,357	4,978	105,845	1,483	7035.1%
MCI (Net)	4,470	717	128	2,347	48	4779.3%
Convention/Conf.	3,214	575	34	1,113	17	6545.5%
Corp. Meetings	420	33	61	372	20	1772.0%
Incentive	858	108	38	975	11	8399.7%

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 Sep. 2022P	YTD Sep. 2021	% Change YTD
First Time Visitors (%)	47.0	NA	57.1	36.6	33.2	3.4
Repeat Visitors (%)	53.0	NA	42.9	63.4	66.8	-3.4

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 Sep. 2022P	YTD Sep. 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	36.70	0.90	3966.5%

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