



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

|                          |                                    |
|--------------------------|------------------------------------|
| Visitor Expenditures:    | \$503.7 million                    |
| Primary Purpose of Stay: | Pleasure (167,165) vs. MCI (5,500) |
| Average Length of Stay:  | 9.70 days                          |
| First Time Visitors:     | 36.7%                              |
| Repeat Visitors:         | 63.3%                              |

| OCEANIA MMA (by Air)               | 2019      | 2020    | 2021    | 2022 Annual Forecast* | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|------------------------------------|-----------|---------|---------|-----------------------|----------------|---------------|--------------|
| Visitor Expenditures (\$ Millions) | 895.1     | NA      | 19.8    | 409.2                 | 503.7          | 19.8          | 2438.4%      |
| Visitor Days                       | 3,420,593 | 479,534 | 84,413  | 1,472,261             | 1,765,891      | 84,413        | 1992.0%      |
| Arrivals                           | 363,551   | 50,710  | 6,524   | 150,711               | 181,979        | 6,524         | 2689.3%      |
| Average Daily Census               | 9,371     | 1,310   | 231     | 4,034                 | 4,838          | 231           | 1992.0%      |
| Per Person Per Day Spending (\$)   | 261.7     | NA      | 235.1   | 277.9                 | 285.2          | 235.1         | 21.3%        |
| Per Person Per Trip Spending (\$)  | 2,462.1   | NA      | 3,041.5 | 2,715.0               | 2,767.8        | 3,041.4       | -9.0%        |
| Length of Stay (days)              | 9.41      | 9.46    | 12.94   | 9.77                  | 9.70           | 12.94         | -25.0%       |

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 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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## Market Summary

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Prior to the 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 had a negative COVID pre-travel test. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights through June 11, 2022 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. This requirement was lifted on June 12, 2022.

- For all of 2022, there were 151,698 visitors from Australia compared to 287,995 visitors (-47.3%) in 2019.
- In 2022, there were 30,281 visitors from New Zealand compared to 75,556 visitors (-59.9%) in 2019.
- In 2022, there were 660 scheduled flights and 198,737 seats from Australia; and 158 scheduled flights and 45,088 seats from New Zealand. In 2019, there were 1,189 flights (-44.5%) with 369,282 seats (-46.2%) from Australia; and 434 flights (-63.6%) and 125,300 seats (-64.0%) from New Zealand.
- In 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

- Unemployment in December 2022 continues to remain at an all-time low in Australia and New Zealand at 3.5 percent and 3.3 percent, respectively.
- Cost of living continues to increase in both Australia and New Zealand putting more financial pressure on consumers.
- The AUD and NZD remain stable against the USD. The exchange rates were sitting at 69 cents (AUD) and 64 cents (NZD) to \$1 USD at the end of December.
- Booking patterns remain the same with flight prices impacting level of bookings and how far in advance consumers are booking.
- Visitor arrivals from Oceania continue to build. In November 2022, 20,231 visitors arrived from Oceania which is 82% of the numbers compared to October 2019. Visitor spend from Oceania for November was US\$56.9million which is 95% of the spend in November 2019.
- Some interesting stats that came from the World Travel and Tourism Conference
  - In 2023, Australians are set to spend more than any other nationality on travel
  - 70% of discretionary spend on travel is on experiences
  - Consumers are more interested in what they are going to do on a holiday than where they are going to go

## Distribution by Island

| OCEANIA MMA (by Air) | 2019    | 2020   | 2021  | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|----------------------|---------|--------|-------|----------------|---------------|--------------|
| O'ahu                | 356,298 | 49,419 | 4,847 | 177,866        | 4,847         | 3569.4%      |
| Maui County          | 61,691  | 7,371  | 1,161 | 26,203         | 1,161         | 2156.1%      |
| Maui                 | 60,582  | 7,202  | 1,125 | 25,553         | 1,125         | 2172.1%      |
| Moloka'i             | 4,680   | 703    | 21    | 1,368          | 21            | 6377.1%      |
| Lāna'i               | 6,129   | 718    | 36    | 1,834          | 36            | 5053.8%      |
| Kaua'i               | 32,168  | 4,177  | 572   | 11,119         | 572           | 1845.5%      |
| Island of Hawai'i    | 47,411  | 6,377  | 672   | 18,539         | 672           | 2657.0%      |

## 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>76849</b> | <b>84693</b> | <b>244,830</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>5396</b> | <b>5,396</b> | <b>NA</b> | <b>NA</b> | <b>27873</b> | <b>55415</b> | <b>76849</b> |
| Auckland        | 0            | 0            | 21,643       | 23,445       | 45,088         | 0        | 0        | 0        | 0           | 0            | NA        | NA        | NA           | NA           | 21,643       |
| Melbourne       | 2010         | 8040         | 8375         | 8710         | 27,135         | 0        | 0        | 0        | 0           | 0            | NA        | NA        | 2010         | 8040         | 8375         |
| Sydney          | 25,863       | 47,375       | 46,831       | 52,538       | 172,607        | 0        | 0        | 0        | 5,396       | 5,396        | NA        | NA        | 25,863       | 47,375       | 46,831       |

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of December 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>260</b> | <b>283</b> | <b>821</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>4221.1</b> |
| Auckland          |           |            | 77         | 81         | 158        |          |          | 0        | 0         | 0         |           |           | NA        | NA            | NA            |
| Melbourne         | 6         | 24         | 25         | 26         | 81         | 0        | 0        | 0        | 0         | 0         |           |           | NA        | NA            | NA            |
| Sydney            | 89        | 159        | 158        | 176        | 582        | 0        | 0        | 0        | 19        | 19        | NA        | NA        | NA        | 826.3         | 2963.2        |

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

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

| OCEANIA MMA (by Air)            | 2019    | 2020   | 2021  | YTD Dec. 2022P | YTD Dec. 2021 | % Change YTD |
|---------------------------------|---------|--------|-------|----------------|---------------|--------------|
| Group vs True Independent (Net) |         |        |       |                |               |              |
| Group Tour                      | 7,017   | NA     | 72    | 2,626          | 72            | 3530.8%      |
| True Independent (Net)          | 214,622 | NA     | 5,956 | 135,690        | 5,956         | 2178.2%      |
| Leisure vs Business             |         |        |       |                |               |              |
| Pleasure (Net)                  | 339,605 | 46,357 | 4,978 | 167,165        | 4,978         | 3257.8%      |

|                  |       |     |     |       |     |         |
|------------------|-------|-----|-----|-------|-----|---------|
| MCI (Net)        | 4,470 | 717 | 128 | 5,500 | 128 | 4183.6% |
| Convention/Conf. | 3,214 | 575 | 34  | 2,059 | 34  | 5881.6% |
| Corp. Meetings   | 420   | 33  | 61  | 2,548 | 61  | 4050.9% |
| Incentive        | 858   | 108 | 38  | 1,052 | 38  | 2688.4% |

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.

## First Timers vs. Repeat Visitors

| OCEANIA MMA (by Air)    | 2019 | 2020 | 2021 | YTD Dec.<br>2022P | YTD Dec.<br>2021 | % Change<br>YTD |
|-------------------------|------|------|------|-------------------|------------------|-----------------|
| First Time Visitors (%) | 47.0 | NA   | 57.1 | 36.7              | 57.1             | -20.4           |
| Repeat Visitors (%)     | 53.0 | NA   | 42.9 | 63.3              | 42.9             | 20.4            |

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 Dec.<br>2022P | YTD Dec.<br>2021 | % Change<br>YTD |
|---|--------|------|------|-------------------|------------------|-----------------|
| State tax revenue generated (\$ Millions) <sup>2/</sup> | 104.48 | NA   | 2.32 | 58.43             | 2.32             | 2422.6%         |

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