



# 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.

## January 2023 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$68.1 million
Primary Purpose of Stay:	Pleasure (24,696) vs. MCI (276)
Average Length of Stay:	8.78 days
First Time Visitors:	38.1%
Repeat Visitors:	61.9%

OCEANIA MMA (by Air)	2019	2020	2021	2022P	2022 Annual Forecast*	Jan. 2023P	Jan. 2022P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	503.7	409.2	68.1	13.0	423.4%
Visitor Days	3,420,593	479,534	84,413	1,765,891	1,472,261	232,937	48,132	384.0%
Arrivals	363,551	50,710	6,524	181,979	150,711	26,530	4,446	496.7%
Average Daily Census	9,371	1,310	231	4,838	4,034	7,514	1,553	384.0%
Per Person Per Day Spending (\$)	261.7	NA	235.1	285.2	277.9	292.2	270.2	8.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,767.8	2,715.0	2,565.9	2,925.3	-12.3%
Length of Stay (days)	9.41	9.46	12.94	9.70	9.77	8.78	10.83	-18.9%

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> 2023 and 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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- In January 2023, there were 20,691 visitors from Australia, compared to 4,222 visitors (+390.0%) in January 2022, and 26,465 visitors (-21.8%) in January 2019, prior to the COVID-19 global pandemic. In January 2023, there were 5,839 visitors from New Zealand, compared to 224 visitors (+2,507.8%) in January 2022 and 4,844 visitors (+20.5%) in January 2019.
- In January 2023, there were 78 scheduled flights with 23,508 seats with service from Melbourne and Sydney. This doubled the air capacity in January 2022 (39 flights, with 11,165 seats, +110.6%) with service from only Sydney. Seat capacity continued to decrease compared to January 2019 (103 scheduled flights, -24.3%, with 32,521 seats, -27.7%) with service from Brisbane, Melbourne and Sydney. In January 2023, there were 30 scheduled flights with 8,740 seats from Auckland. Service from Auckland to Hawai'i was suspended in January 2022. In January 2019, there were 41 flights (-26.8%) with 12,112 seats (-28.0%).
- In 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

- As 2023 begins, experts predict that inflation is likely to peak soon as rising interest rates dampen domestic demand and fuel prices moderate.
- The tight labour market and higher wage growth likely will keep inflation above 4 percent through 2023 in Australia.
- Unemployment remains low in Australia and New Zealand at 3.5 percent and 3.4 percent respectively.
- Labor shortages in Australia has caused the government to add more professions to the skills list, to allow more people to work in Australia.
- Currency exchange rates are currently sitting at 69 cents (AUD) and 63 cents (NZD) to one USD.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
O'ahu	356,298	49,419	4,847	177,866	26,084	4,224	517.6%
Maui County	61,691	7,371	1,161	26,203	2,797	544	413.9%
Maui	60,582	7,202	1,125	25,553	2,710	535	406.8%
Moloka'i	4,680	703	21	1,368	64	18	257.7%
Lāna'i	6,129	718	36	1,834	161	22	630.8%
Kaua'i	32,168	4,177	572	11,119	971	304	218.9%
Island of Hawai'i	47,411	6,377	672	18,539	2,593	369	603.4%

## 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>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	2022P	Jan. 2023P	Jan. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	7,017	NA	72	2,626	163	23	623.1%
True Independent (Net)	214,622	NA	5,956	135,690	21,638	3,829	465.1%
Leisure vs Business							
Pleasure (Net)	339,605	46,357	4,978	167,165	24,696	3,967	522.6%
MCI (Net)	4,470	717	128	5,500	276	32	771.1%
Convention/Conf.	3,214	575	34	2,059	258	26	875.9%
Corp. Meetings	420	33	61	2,548	11	3	250.3%
Incentive	858	108	38	1,052	46	2	2112.6%

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.

## First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	38.1	26.3	11.9
Repeat Visitors (%)	53.0	NA	42.9	63.3	61.9	73.7	-11.9

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	2022P	Jan. 2023P	Jan. 2022P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	58.43	7.90	1.52	420.1%

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