



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

Visitor Expenditures:	\$149.9 million
Primary Purpose of Stay:	Pleasure (52,683) vs. MCI (785)
Average Length of Stay:	8.98 days
First Time Visitors:	40.6%
Repeat Visitors:	59.4%

OCEANIA MMA (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	503.7	691.2	149.9	38.6	288.5%
Visitor Days	3,420,593	479,534	84,413	1,765,891	2,307,871	516,808	144,984	256.5%
Arrivals	363,551	50,710	6,524	181,979	240,536	57,533	14,081	308.6%
Average Daily Census	9,371	1,310	231	4,838	6,323	5,742	1,611	256.5%
Per Person Per Day Spending (\$)	261.7	NA	235.1	285.2	299.5	290.1	266.2	9.0%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,767.8	2,873.6	2,606.3	2,741.3	-4.9%
Length of Stay (days)	9.41	9.46	12.94	9.70	9.59	8.98	10.30	-12.8%

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) 2023 annual forecast (Quarter 1, 2023).

<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 the first quarter of 2023, there were 44,507 visitors from Australia, compared to 13,282 visitors (+235.1%) in the first quarter of 2022. There were 57,361 visitors (-22.4%) in the first quarter of 2019, prior to the COVID-19 pandemic.
- In the first quarter of 2023, there were 13,026 visitors from New Zealand, compared to 799 visitors (+1,529.6%) in the first quarter of 2022 and 11,237 visitors (+15.9%) in the first quarter of 2019.
- In the first quarter of 2023, there were 191 scheduled flights with 57,411 seats with service from Melbourne and Sydney. This doubled the air capacity in the first quarter of 2022 (95 flights, +101.1% with 27,873 seats, +106.0%) with service from only Sydney. Seat capacity continued to decrease compared to the first quarter of 2019 (274 scheduled flights, -30.3%, with 86,201 seats, -33.4%) with service from Brisbane, Melbourne and Sydney.
- In the first quarter of 2023, there were 75 scheduled flights with 21,678 seats from Auckland. Service from Auckland to Hawai'i was suspended in the first quarter of 2022. In the first quarter of 2019, there were 101 flights (-25.7%) with 29,744 seats (-27.1%).
- 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

- A new survey by Airservices Australia suggests that more than a third of Aussies are expecting to fly more for leisure travel than they did before the pandemic. The study of 1,000 people also found that 37 percent of travelers believe air travel is now essential to their wellbeing, with younger demographics placing the highest premium on air travel's relationship to mental health. Around 45 percent of those aged 18-29 and 49 percent between 30-39 claimed air travel to be essential to wellbeing, while the same report also showed that close to 60 percent of Aussies plan on flying internationally over the next 12 months, and 68 percent said they are intending to take a flight for leisure in Australia.
- Airlift from Australia and New Zealand is increasing slightly with 120,757 air seats expected in the first half of 2023.
- The current airlift schedules through 2023 still sit below pre-Covid/2019 levels, down 31 percent. However recent Oceania arrivals show that this gap can be minimised if load factors are high. For example, Jan/Feb YTD arrivals from Oceania in 2023 were only 16 percent down from Jan/Feb YTD 2019.
- Hawaiian Airlines is increasing to a daily service from Sydney in April 2023 and then back to 5 days a week from May 2023.
- Unemployment remains low in Australia and New Zealand at 3.5 percent and 3.4 percent respectively.
- Labor shortages in Australia has pushed the government to add more professions to the skills list, to allow more people to work in Australia.
- Exchange rates are currently sitting at 69 cents (AUD) and 62 cents (NZD) to one USD.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
O'ahu	356,298	49,419	4,847	177,866	56,305	13,304	323.2%
Maui County	61,691	7,371	1,161	26,203	5,994	1,916	212.9%
Maui	60,582	7,202	1,125	25,553	5,898	1,868	215.8%
Moloka'i	4,680	703	21	1,368	443	23	1811.9%
Lāna'i	6,129	718	36	1,834	579	107	441.3%
Kaua'i	32,168	4,177	572	11,119	2,838	781	263.3%
Island of Hawai'i	47,411	6,377	672	18,539	5,102	1,812	181.6%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>79,089</b>	<b>83,976</b>	<b>85,398</b>	<b>84,151</b>	<b>332,614</b>	<b>27,873</b>	<b>55,415</b>	<b>76,849</b>	<b>83,688</b>	<b>243,825</b>	<b>183.7</b>	<b>51.5</b>	<b>11.1</b>	<b>0.6</b>	<b>36.4</b>
Auckland	21,678	22,922	25,338	23,200	93,138	0	0	21,643	23,445	45,088	NA	NA	17.1	-1.0	106.6
Melbourne	7705	8710	8710	9045	34,170	2010	8040	8375	8040	26,465	283.3	8.3	4.0	12.5	29.1
Sydney	49,706	52,344	51,350	51,906	205,306	25,863	47,375	46,831	52,203	172,272	92.2	10.5	9.6	-0.6	19.2

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>266</b>	<b>281</b>	<b>285</b>	<b>281</b>	<b>1,113</b>	<b>95</b>	<b>183</b>	<b>260</b>	<b>280</b>	<b>818</b>	<b>180.0</b>	<b>53.6</b>	<b>9.6</b>	<b>0.4</b>	<b>36.1</b>
Auckland	75	79	87	80	321	0	0	77	81	158	NA	NA	13.0	-1.2	103.2
Melbourne	23	26	26	27	102	6	24	25	24	79	283.3	8.3	4.0	12.5	29.1
Sydney	168	176	172	174	690	89	159	158	175	581	88.8	10.7	8.9	-0.6	18.8

Source: DBEDT analysis from Diio Mi flight schedules as of March 21, 2023, subject to change.

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

OCEANIA MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	7,017	NA	72	2,626	810	212	281.5%
True Independent (Net)	214,622	NA	5,956	135,690	43,528	11,440	280.5%
Leisure vs Business							
Pleasure (Net)	339,605	46,357	4,978	167,165	52,683	12,436	323.6%
MCI (Net)	4,470	717	128	5,500	785	293	168.0%
Convention/Conf.	3,214	575	34	2,059	490	106	363.8%
Corp. Meetings	420	33	61	2,548	88	26	244.4%
Incentive	858	108	38	1,052	250	206	21.5%

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	YTD Mar. 2023P	YTD Mar. 2022P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	40.6	34.6	6.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	59.4	65.4	-6.0

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	YTD Mar. 2023P	YTD Mar. 2022P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	58.43	17.39	4.51	286.0%

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