



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

Visitor Expenditures:	\$352.9 million
Primary Purpose of Stay:	Pleasure (122,307) vs. MCI (3,628)
Average Length of Stay:	8.98 days
First Time Visitors:	43.0%
Repeat Visitors:	57.0%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD July 2023P	YTD July 2022	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	706.0	352.9	211.1	67.2%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,432,062	1,208,592	759,003	59.2%
Arrivals	363,551	50,710	6,524	186,551	253,480	134,514	77,460	73.7%
Average Daily Census	9,371	1,310	231	4,973	6,663	5,701	3,580	59.2%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	290.3	292.0	278.1	5.0%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,785.2	2,623.8	2,725.5	-3.7%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.59	8.98	9.80	-8.3%

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 2, 2023).

<sup>1/</sup> 2023 visitor data are preliminary. 2019 to 2022 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 seven months of 2023, there were 103,906 visitors from Australia, compared to 69,023 visitors (+50.5%) in the first seven months of 2022. There were 159,887 visitors (-35.0%) in the first seven months of 2019, prior to the COVID-19 pandemic.
- In the first seven months of 2023, there were 30,608 visitors from New Zealand, compared to 8,437 visitors (+262.8%) in the first seven months of 2022 and 43,421 visitors (-29.5%) in the first seven months of 2019.
- In the first seven months of 2023, there were 457 scheduled flights with 137,914 seats from Melbourne and Sydney, compared to 343 flights (+33.2%) with 102,935 seats (+34.0%) from Melbourne and Sydney in the first seven months of 2022. Seat capacity continued to decrease compared to the first seven months of 2019 (684 flights, -33.2% with 216,043 seats, -36.2%) with service from Brisbane, Melbourne and Sydney.
- In the first seven months of 2023, there were 187 scheduled flights with 54,194 seats from Auckland, compared to 25 flights (+648.0%) with 6,941 seats (+680.8%) in the first seven months of 2022 and 257 flights (-27.2%) with 74,462 seats (-27.2%).
- In 2022, there were 155,700 visitors from Australia compared to 287,995 visitors (-45.9%) in 2019. In 2022, there were 30,851 visitors from New Zealand compared to 75,556 visitors (-59.2%) in 2019.
- In 2022, there were 660 scheduled flights with 198,737 seats from Australia and 158 scheduled flights with 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%) with 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 were 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 with 5,396 seats from Oceania in 2021, compared to 328 scheduled flights with 95,737 seats in 2020 and 1,623 flights with 482,717 seats in 2019.

## Market Conditions

- Exchange rates are currently sitting at 65 cents (AUD) and 61 cents (NZD) to one USD.
- In a recent poll by finder.com.au of over 1,000 adult Aussies, three in four (74%) respondents – equivalent to 15 million people – said they would cling to their comforts regardless of their financial situation. When asked which luxuries they have held on to “despite the cost-of-living crisis”, only one in four (26%) said they had “given up all luxuries”. The fourth most held-onto luxury are overseas holidays, which one in seven (15%) respondents said they refused to give up.
- The airline carrier, Jetstar, indicated that they will be increasing services where they see demand in the next 12 months.
- Leading travel industry stock market analyst John O'Shea issued an update predicting strong leisure travel demand, even in the face of high interest rates and soft economic growth.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
O'ahu	356,298	49,419	4,847	182,278	132,038	75,200	75.6%
Maui County	61,691	7,371	1,161	26,986	16,392	11,378	44.1%
Maui	60,582	7,202	1,125	26,305	16,114	11,082	45.4%
Moloka'i	4,680	703	21	1,391	1,011	334	202.8%
Lāna'i	6,129	718	36	1,895	1,239	574	115.9%
Kaua'i	32,168	4,177	572	11,342	7,395	4,350	70.0%
Island of Hawai'i	47,411	6,377	672	18,799	12,731	7,521	69.3%

## 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>83,081</b>	<b>84,129</b>	<b>84,664</b>	<b>330,963</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>49.9</b>	<b>9.5</b>	<b>1.2</b>	<b>35.7</b>
Auckland	21,678	22,617	24,682	23,119	92,096	0	0	21,643	23,445	45,088			14.0	-1.4	104.3
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	51,754	50,737	52,500	204,697	25,863	47,375	46,831	52,203	172,272	92.2	9.2	8.3	0.6	18.8

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>278</b>	<b>282</b>	<b>283</b>	<b>1,109</b>	<b>95</b>	<b>183</b>	<b>260</b>	<b>280</b>	<b>818</b>	<b>180.0</b>	<b>51.9</b>	<b>8.5</b>	<b>1.1</b>	<b>35.6</b>
Auckland	75	78	86	80	319	0	0	77	81	158			11.7	-1.2	101.9
Melbourne	23	26	26	27	102	6	24	25	24	79	283.3	8.3	4.0	12.5	29.1
Sydney	168	174	170	176	688	89	159	158	175	581	88.8	9.4	7.6	0.6	18.4

Source: DBEDT analysis from Diio Mi flight schedules as of August 25, 2023, subject to change.

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

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
Group vs True Independent (Net)							
Group Tour	7,017	NA	72	2,670	2,897	888	226.4%
True Independent (Net)	214,622	NA	5,956	138,997	98,930	61,055	62.0%
Leisure vs Business							
Pleasure (Net)	339,605	46,357	4,978	170,983	122,307	70,492	73.5%
MCI (Net)	4,470	717	128	5,394	3,628	1,312	176.5%
Convention/Conf.	3,214	575	34	2,118	1,164	683	70.4%
Corp. Meetings	420	33	61	2,312	1,853	259	614.9%
Incentive	858	108	38	1,117	671	479	40.1%

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	2022	YTD July 2023P	YTD July 2022	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	43.0	35.2	7.8
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.0	64.8	-7.8

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	2022	YTD July 2023P	YTD July 2022	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	59.95	40.94	24.64	66.1%

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