



Oceania Fact Sheet

Oceania Overview

Hawai'i Tourism Oceania (HTO) is contracted by the Hawai'i Tourism Authority (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 2024 Quick Facts^{1/}

Visitor Expenditures: \$131.9 million
 Primary Purpose of Stay: Pleasure (47,523) vs. MCI (1,380)
 Average Length of Stay: 8.72 days
 First Time Visitors: 44.8%
 Repeat Visitors: 55.2%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Mar. 2024P	YTD Mar. 2023P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	639.5	673.7	131.9	149.9	-12.0%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,167,702	2,238,871	458,068	516,808	-11.4%
Arrivals	363,551	50,710	6,524	186,551	239,558	248,763	52,503	57,533	-8.7%
Average Daily Census	9,371	1,310	231	4,973	5,939	6,117	5,034	5,742	-12.3%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	300.9	288.0	290.1	-0.8%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,669.7	2,708.3	2,512.3	2,606.3	-3.6%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.05	9.00	8.72	8.98	-2.9%

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) 2024 annual forecast (Quarter 1, 2024).

^{1/} 2023 and 2024 visitor data are preliminary. 2019 to 2022 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

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Market Summary

- In the first quarter of 2024, 52,503 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$131.9 million. There were 57,533 visitors (-8.7%) in the first quarter of 2023 and visitor spending was \$149.9 million (-12.0%). In the first quarter of pre-pandemic 2019, 68,598 visitors (-23.5%) arrived from this market and visitor spending was \$170.6 million (-22.7%).
- In the first quarter of 2024, there were 194 scheduled flights with 58,583 seats from Melbourne and Sydney compared to 191 flights (+1.6%) with 57,411 seats (+2.0%) in the first quarter of 2023. Air capacity remained below the first quarter of 2019 level (274 flights, -29.2% with 86,201 seats, -32.0%) with service from Brisbane, Melbourne, and Sydney.
- There were 75 scheduled flights with 21,708 seats from Auckland in the first quarter of 2024, compared to 75 flights (0.0%) with 21,678 seats (+0.1%) in the first quarter of 2023 and 101 flights (-25.7%) with 29,744 seats (-27.0%) in the first quarter of 2019.
- In 2023, there were 187,101 visitors from Australia, compared to 155,700 visitors in 2022. There were 287,995 visitors in 2019. Visitors from Australia spent \$506.7 million in 2023, compared to \$442.9 million in 2022 and \$730.4 million in 2019. Daily visitor spending in 2023 was \$301 per person, higher than 2022 (\$292 per person) and 2019 (\$268 per person).
- In 2023, there were 52,457 visitors from New Zealand, compared to 30,851 visitors in 2022 and 75,556 visitors in 2019. Visitors from New Zealand spent \$135.2 million in 2023, compared to \$75.4 million in 2022 and \$167.0 million in 2019. Daily visitor spending in 2023 was \$280 per person, higher than 2022 (\$252 per person) and 2019 (\$242 per person).
- In 2023, there were 787 scheduled flights with 237,995 seats from Melbourne and Sydney, compared to 660 flights with 198,737 seats from Melbourne and Sydney in 2022. Seat capacity continued to decrease compared to 2019 (1,189 flights with 369,282 seats) with service from Brisbane, Melbourne, and Sydney.
- In 2023, there were 316 scheduled flights with 91,190 seats from Auckland, compared to 158 flights with 45,088 seats in 2022 and 434 flights with 125,300 seats in 2019.

Market Conditions

- Currency: In March 2024, the AUD saw a slight increase to end at 66 cents. The NZD decreased slightly to 60 cents against the USD.
- In Australia, economy growth is to remain below-trend in the near term – but activity should improve later in 2024 as the pressure on households eases with rate and tax cuts as well as a moderation in inflation.
- New Zealand is in a recession after the economy shrank two quarters in a row. Gross Domestic Product (GDP) fell by 0.1 percent in the Quarter 4 2023.
- Bookings and travel to the USA remain slower than hoped for, mainly due to cost of living pressures and the unfavorable exchange rate. In line with this, In the first two months of 2024, 37,971 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$96.7 million. There were 40,880 visitors in the first two months of 2023 and visitor spending was \$103.3 million. In the first two months of pre-pandemic 2019, 48,364 visitors arrived from this market and visitor spending was \$118.3 million.
- Interest in responsible travel continues to rise, as evidenced by Intrepid Travel, who hit an all-time financial record in FY23 with a net profit of AUD\$21.8 million – a \$47.7 million turnaround in just 12 months. Even more impressive is its highest-ever impact result with \$4.6 million going to charitable and community causes.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
O'ahu	356,298	49,419	4,847	182,278	235,881	51,432	56,305	-8.7%
Maui County	61,691	7,371	1,161	26,986	25,464	4,842	5,994	-19.2%
Maui	60,582	7,202	1,125	26,305	24,918	4,442	5,898	-24.7%
Moloka'i	4,680	703	21	1,391	1,931	545	443	22.8%
Lāna'i	6,129	718	36	1,895	2,441	539	579	-6.9%
Kaua'i	32,168	4,177	572	11,342	17,301	2,851	2,838	0.4%
Island of Hawai'i	47,411	6,377	672	18,799	25,929	4,166	5,102	-18.3%

Airlift: Scheduled Seats and Flights

Scheduled seats	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	80,291	66,633	73,615	76,162	296,701	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-12.2	-8.4	-9.9
Auckland	21,708	10,618	11,494	17,311	61,131	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-52.9	-23.1	-33.0
Melbourne	8,710	8,710	8,710	8,710	34,840	7,705	8,710	8,710	9,045	34,170	13.0	0.0	0.0	-3.7	2.0
Sydney	49,873	47,305	53,411	50,141	200,730	49,706	51,754	50,737	51,628	203,825	0.3	-8.6	5.3	-2.9	-1.5

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	269	233	255	266	1,023	266	278	281	278	1,103	1.1	-16.2	-9.3	-4.3	-7.3
Auckland	75	36	39	59	209	75	78	85	78	316	0.0	-53.8	-54.1	-24.4	-33.9
Melbourne	26	26	26	26	104	23	26	26	27	102	13.0	0.0	0.0	-3.7	2.0
Sydney	168	171	190	181	710	168	174	170	173	685	0.0	-1.7	11.8	4.6	3.6

Source: DBEDT analysis from Diio Mi flight schedules as of April 19, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,176	834	810	3.0%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	39,160	43,528	-10.0%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	47,523	52,683	-9.8%
MCI (Net)	4,470	717	128	5,394	5,741	1,380	785	75.9%
Convention/Conf.	3,214	575	34	2,118	2,719	1,104	490	125.2%
Corp. Meetings	420	33	61	2,312	1,977	33	88	-63.1%
Incentive	858	108	38	1,117	1,125	284	250	13.7%

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	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	44.8	40.6	4.2
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	55.2	59.4	-4.2

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	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	15.30	17.39	-12.0%

^{2/}State government tax revenue generated (direct, indirect, and induced)