



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 February 2024 Quick Facts^{1/}

Visitor Expenditures:	\$96.7 million
Primary Purpose of Stay:	Pleasure (34,889) vs. MCI (731)
Average Length of Stay:	8.89 days
First Time Visitors:	44.9%
Repeat Visitors:	55.1%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	639.5	673.7	96.7	103.3	-6.3%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,167,702	2,238,871	337,455	361,013	-6.5%
Arrivals	363,551	50,710	6,524	186,551	239,558	248,763	37,971	40,880	-7.1%
Average Daily Census	9,371	1,310	231	4,973	5,939	6,117	5,624	6,119	-8.1%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	300.9	286.6	286.0	0.2%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,669.7	2,708.3	2,547.3	2,526.0	0.8%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.05	9.00	8.89	8.83	0.6%

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 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.
- In the first two months of 2024, there were 134 scheduled flights with 40,577 seats from Melbourne and Sydney compared to 129 flights with 38,731 seats in the first two months 2023. Air capacity remained below the first two months 2019 level (188 flights with 59,381 seats) with service from Brisbane, Melbourne, and Sydney.
- There were 48 scheduled flights with 13,893 seats from Auckland in the first two months 2024, compared to 50 flights with 14,521 seats in the first two months 2023 and 67 flights with 19,782 seats in the first two months 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

- Both the AUD and NZD saw a slight drop in February 2024 to 65 cents and 61 cents against the USD.
- The ANZ Consumer Confidence update was released for New Zealand during the month. Consumer confidence continues to edge higher, with households a touch more upbeat about the longer-term outlook but still pessimistic about their current position.
- The Cook Islands have been seeing a continuation of growth in arrivals, particularly from New Zealand which make up 66 percent of visitors. Interestingly, the Cook Islands Tourism body have concerns about the issue of over tourism commenting as follows: “Perpetual growth in terms of pure visitor numbers to the Cook Islands, and in particular Rarotonga, is simply not achievable, or desirable.”
- HTO’s sponsorship of the Ocean Film Festival started in February 2024. At each of the 60+ screenings our Journey With Aloha video will play before the film screenings, and we have worked with Hawaiian Airlines to give away a trip which will give us the opportunity to gather to consumer data. There have been 23 screenings to date.
- In February 2024, the Travel Associates Showcase also took place on the Gold Coast. There were over 200 Travel Associates travel agents in attendance. HTO was a gold sponsor, meaning they were able to present for 15 minutes to groups of travel agents in the main theatre and take part in the expo.
- HTO presented at the Flight Centre Trade Day in Auckland, providing an opportunity to talk to Flight Centre travel consultants throughout the country. The format included booth sessions throughout the day with the focus on helping consultants choose the best island to match their clients’ travel preferences.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O’ahu	356,298	49,419	4,847	182,278	235,881	37,106	40,028	-7.3%
Maui County	61,691	7,371	1,161	26,986	25,464	3,768	3,879	-2.9%
Maui	60,582	7,202	1,125	26,305	24,918	3,581	3,784	-5.4%
Moloka’i	4,680	703	21	1,391	1,931	262	111	135.1%
Lāna’i	6,129	718	36	1,895	2,441	472	208	126.4%
Kaua’i	32,168	4,177	572	11,342	17,301	2,392	1,774	34.9%
Island of Hawai’i	47,411	6,377	672	18,799	25,929	2,818	3,353	-16.0%

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	81732	67902	73683	72778	296,095	79089	83081	83827	83188	329,185	3.3	-18.3	-12.1	-12.5	-10.1
Auckland	22,593	11,948	11,562	17,338	63,441	21,678	22,617	24,380	22,515	91,190	4.2	-47.2	-52.6	-23.0	-30.4
Melbourne	8710	8710	8710	7370	33,500	7705	8710	8710	9045	34,170	13.0	0.0	0.0	-18.5	-2.0
Sydney	50,429	47,244	53,411	48,070	199,154	49,706	51,754	50,737	51,628	203,825	1.5	-8.7	5.3	-6.9	-2.3

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	274	237	255	257	1,023	266	278	281	278	1,103	3.0	-14.7	-9.3	-7.6	-7.3
Auckland	78	40	39	59	216	75	78	85	78	316	4.0	-48.7	-54.1	-24.4	-31.6
Melbourne	26	26	26	22	100	23	26	26	27	102	13.0	0.0	0.0	-18.5	-2.0
Sydney	170	171	190	176	707	168	174	170	173	685	1.2	-1.7	11.8	1.7	3.2

Source: DBEDT analysis from Diio Mi flight schedules as of January 25, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,176	265	495	-46.3%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	29,110	32,265	-9.8%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	34,889	37,727	-7.5%
MCI (Net)	4,470	717	128	5,394	5,741	731	465	57.1%
Convention/Conf.	3,214	575	34	2,118	2,719	642	335	91.8%
Corp. Meetings	420	33	61	2,312	1,977	25	19	31.5%
Incentive	858	108	38	1,117	1,125	103	153	-32.6%

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	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	44.9	40.1	4.8
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	55.1	59.9	-4.8

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	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	11.22	11.98	-6.3%

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