



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 November 2023 Quick Facts^{1/}

Visitor Expenditures:	\$580.4 million
Primary Purpose of Stay:	Pleasure (199,328) vs. MCI (5,455)
Average Length of Stay:	8.99 days
First Time Visitors:	42.9%
Repeat Visitors:	57.1%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD Nov. 2023P	YTD Nov. 2022	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	658.0	580.4	455.1	27.5%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,230,976	1,966,198	1,598,471	23.0%
Arrivals	363,551	50,710	6,524	186,551	247,886	218,635	163,798	33.5%
Average Daily Census	9,371	1,310	231	4,973	6,112	5,887	4,786	23.0%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	295.2	284.7	3.7%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,654.6	2,654.7	2,778.6	-4.5%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.00	8.99	9.76	-7.8%

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 4, 2023).

^{1/} 2023 visitor data are preliminary. 2019 to 2022 visitor data are the final numbers and reflect updated airfare statistics from DII O 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 11 months of 2023, there were 170,284 visitors from Australia, compared to 137,472 visitors (+23.9%) in the first 11 months of 2022. There were 264,789 visitors (-35.7%) in the first 11 months of 2019, prior to the COVID-19 pandemic.
- In the first 11 months of 2023, there were 48,351 visitors from New Zealand, compared to 26,326 visitors (+83.7%) in the first 11 months of 2022 and 69,979 visitors (-30.9%) in the first ten months of 2019.
- In the first 11 months of 2023, there were 719 scheduled flights with 217,381 seats from Melbourne and Sydney, compared to 593 flights with 178,553 seats from Melbourne and Sydney in the first 11 months of 2022. Seat capacity continued to decrease compared to the first 11 months of 2019 (1,088 flights with 339,403 seats) with service from Brisbane, Melbourne, and Sydney.
- In the first 11 months of 2023, there were 290 scheduled flights with 83,650 seats from Auckland, compared to 129 flights with 36,642 seats in the first 11 months of 2022 and 399 flights with 114,924 seats in the first 11 months of 2019.
- 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

- The NZ Dollar ended the month of November 2023 almost four cents higher than where it started (from 58cents to 61.7cents). The Australian Dollar also increased to 66cents per 1 USD.
- New figures published in the latest CommBank iQ Cost of Living Insights report have shown spending on travel by Aussies continues to be a priority despite the inflationary pressures placed on most households.
- Although figures showed there had been a dip in overall discretionary spending, travel was one of only two categories to rise above the inflationary growth rate, recording an 8.2 percent increase on the previous corresponding quarter in 2022.
- The growth in spend was highest in the cruise sector with Aussies spending 55.3 percent more in the latest quarter in 2023 than they did last year.
- Online travel bookings also performed well, increasing by 34.4 percent.
- Households in South Australia and Western Australia were found to have increased discretionary spending at the fastest rate.
- Following the New Zealand General Election, there appears to be more confidence from the business sector with law changes already in process that will benefit employers.
- The NZ Reserve Bank has retained the official cash rate at 5.5 percent although has advised that these levels will need to be maintained through much of next year thus continuing to put pressure on home loans and general cost of living.
- United Airlines launched a new route ex Christchurch to San Francisco. This is the first time a U.S. flag carrier has flown direct service to the U.S. from Christchurch.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	356,298	49,419	4,847	182,278	215,153	159,835	34.6%
Maui County	61,691	7,371	1,161	26,986	24,167	23,474	2.9%
Maui	60,582	7,202	1,125	26,305	23,620	22,878	3.2%
Moloka'i	4,680	703	21	1,391	1,929	1,097	76.0%
Lāna'i	6,129	718	36	1,895	2,315	1,505	53.8%
Kaua'i	32,168	4,177	572	11,342	16,301	9,602	69.8%
Island of Hawai'i	47,411	6,377	672	18,799	24,092	15,870	51.8%

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
OCEANIA	79,089	83,081	83,827	83,768	329,765	27,873	55,415	76,849	83,688	243,825	183.7	49.9	9.1	0.1	35.2
Auckland	21,678	22,617	24,380	22,817	91,492	0	0	21,643	23,445	45,088	NA	NA	12.6	-2.7	102.9
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	51,906	204,103	25,863	47,375	46,831	52,203	172,272	92.2	9.2	8.3	-0.6	18.5

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	266	278	281	280	1,105	95	183	260	280	818	180.0	51.9	8.1	0.0	35.1
Auckland	75	78	85	79	317	0	0	77	81	158	NA	NA	10.4	-2.5	100.6
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	174	686	89	159	158	175	581	88.8	9.4	7.6	-0.6	18.1

Source: DBEDT analysis from Diio Mi flight schedules as of November 22, 2023, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Group vs True Independent (Net)							
Group Tour	7,017	NA	72	2,670	4,883	2,225	119.5%
True Independent (Net)	214,622	NA	5,956	138,997	156,022	123,071	26.8%
Leisure vs Business							
Pleasure (Net)	339,605	46,357	4,978	170,983	199,328	150,379	32.6%
MCI (Net)	4,470	717	128	5,394	5,455	5,033	8.4%
Convention/Conf.	3,214	575	34	2,118	2,567	1,766	45.4%
Corp. Meetings	420	33	61	2,312	1,975	2,304	-14.3%
Incentive	858	108	38	1,117	974	1,116	-12.7%

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	YTD Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.9	36.8	6.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.1	63.2	-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	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	67.33	53.13	26.7%

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