



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 December 2023 Quick Facts^{1/}

Visitor Expenditures:	\$639.5 million
Primary Purpose of Stay:	Pleasure (217,923) vs. MCI (5,741)
Average Length of Stay:	9.05 days
First Time Visitors:	42.7%
Repeat Visitors:	57.3%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD Dec. 2023P	YTD Dec. 2022	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	658.0	639.5	516.8	23.7%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,230,976	2,167,702	1,815,212	19.4%
Arrivals	363,551	50,710	6,524	186,551	247,886	239,558	186,551	28.4%
Average Daily Census	9,371	1,310	231	4,973	6,112	5,939	4,973	19.4%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	295.0	284.7	3.6%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,654.6	2,669.7	2,770.4	-3.6%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.00	9.05	9.73	-7.0%

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 DIIO 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

- For all of 2023, there were 187,101 visitors from Australia, compared to 155,700 visitors in 2022. There were 287,995 visitors in 2019, prior to the COVID-19 pandemic.
- 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.
- In 2022, there were 155,700 visitors from Australia compared to 4,366 visitors in 2021, 41,399 visitors in 2020 and 287,995 visitors in 2019. Total visitor spending was \$442.9 million in 2022 compared to \$13.7 million in 2021 and \$730.42 million in 2019.
- In 2022, there were 30,851 visitors from New Zealand compared to 2,158 visitors in 2021, 9,310 visitors in 2020 and 75,556 visitors in 2019. Total visitor spending was \$75.4 million in 2022 compared to \$5.8 million in 2021 and \$167.0 million in 2019.
- In 2022, there were 660 scheduled flights with 198,737 seats from Australia. After being suspended from April 2020 through November 2021 due to the pandemic, limited air service resumed from Sydney, Australia resumed in December 2021 with 19 scheduled flights and 5,396 seats. There were 242 scheduled flights with 70,299 seats in 2020 compared to 1,189 flights with 369,282 seats in 2019.
- In 2022, there were 158 scheduled flights with 45,088 seats from Auckland New Zealand. Direct service from New Zealand was suspended from April 2020 through June 2022 due to the pandemic and resumed from July 2022. There were 86 scheduled flights with 25,438 seats in 2020 compared to 434 flights with 125,300 seats in 2019.

Market Conditions

- 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. While the 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 forking out 55.3 percent more in the latest quarter than they did last year, while 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.
- The New Zealand economy ended the year with inflation remaining stubbornly high at 5.6 percent. The good news is that this will start to fall in 2024.
- On the currency front, both the AUD and NZD rallied from what had been a very soft second half of the year. The AUD ended the year at 68cents versus the USD and the NZD was at 63cents.
- United Airlines launched a new route ex Christchurch to San Francisco. The first time a US flag carrier has flown direct service to the US from Christchurch.
- According to Brand USA the top three US destinations for Australian and New Zealand Travelers are: 1. California 2. Hawai'i 3. New York

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
O'ahu	356,298	49,419	4,847	182,278	235,881	182,278	29.4%
Maui County	61,691	7,371	1,161	26,986	25,464	26,986	-5.6%
Maui	60,582	7,202	1,125	26,305	24,918	26,305	-5.3%
Moloka'i	4,680	703	21	1,391	1,931	1,391	38.8%
Lāna'i	6,129	718	36	1,895	2,441	1,895	28.8%
Kaua'i	32,168	4,177	572	11,342	17,301	11,342	52.5%
Island of Hawai'i	47,411	6,377	672	18,799	25,929	18,799	37.9%

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	YTD Dec. 2023P	YTD Dec. 2022	% Change
Group vs True Independent (Net)							
Group Tour	7,017	NA	72	2,670	5,176	2,670	93.8%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	138,997	23.6%
Leisure vs Business							
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	170,983	27.5%
MCI (Net)	4,470	717	128	5,394	5,741	5,394	6.4%
Convention/Conf.	3,214	575	34	2,118	2,719	2,118	28.4%
Corp. Meetings	420	33	61	2,312	1,977	2,312	-14.5%
Incentive	858	108	38	1,117	1,125	1,117	0.8%

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.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022	YTD Dec. 2023P	YTD Dec. 2022	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	36.7	6.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	63.3	-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 Dec. 2023P	YTD Dec. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	59.95	23.7%

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