



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.

January 2024 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	2023P	2023 Annual Forecast*	Jan. 2024P	Jan. 2023P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	639.5	658.0	56.0	68.1	-17.7%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,167,702	2,230,976	195,652	232,937	-16.0%
Arrivals	363,551	50,710	6,524	186,551	239,558	247,886	22,880	26,530	-13.8%
Average Daily Census	9,371	1,310	231	4,973	5,939	6,112	6,311	7,514	-16.0%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	295.0	286.2	292.2	-2.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,669.7	2,654.6	2,447.6	2,565.9	-4.6%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.05	9.00	8.55	8.78	-2.6%

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) 2023 annual forecast (Quarter 4, 2023).

^{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.

Contact Information

Hawai'i Tourism Authority: Ross Willkom, Brand Manager
Tel: (808) 973-2279
ross.willkom@gohta.net

Hawai'i Tourism Oceania:

Australia and New Zealand: Darragh Walshe, Account Manager
Tel: +64 (9) 977 2234
dwalshe@hawaiitourism.co.nz

Market Summary

- In January 2024, there were 22,880 visitors from Oceania (Australia and New Zealand) compared to 26,530 visitors in January 2023 and 31,308 visitors in pre-pandemic January 2019. Visitors from Oceania spent \$56.0 million in January 2024, compared to \$68.1 million in January 2023 and \$77.4 million in January 2019. Daily visitor spending in January 2024 was \$286 per person, lower than January 2023 (\$292 per person) but higher than January 2019 (\$265 per person).
- In January 2024, there were 75 scheduled flights with 22,636 seats from Melbourne and Sydney compared to 77 flights (-2.6%) with 23,173 seats (-2.3%) in January 2023. Air capacity remained below the January 2019 level (103 flights, -27.2% with 32,521 seats, -30.4%) with service from Brisbane, Melbourne, and Sydney.
- There were 25 scheduled flights with 7,211 seats from Auckland in January 2024, compared to 28 flights (-10.7%) with 8,168 seats (-11.7%) in January 2023 and 41 flights (-39.0%) with 12,112 seats (-40.5%) in January 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 currencies saw a slight drop during January 2024 to end at 65 cents and 61 cents against the USD.
- The January 2024 ANZ Business Outlook report reflected a rise in business confidence from New Zealand businesses. There are still challenges surrounding high inflation and interest rates, but the opinion is that these will start easing during the year.
- In Australia, signs suggest inflation and interest rates may fall considerably without killing growth or employment.
- A recent survey by travel insurance provider Insure and Go found 71 percent of under-30s and 65 percent of 31 to 50-year-olds would rather travel than buy a house over the next 12 months.
- According to Sky Scanner's 2024 Australia Travel Trends Report 75 percent of Australian travelers' plan to take the same number, if not more, trips abroad in 2024 compared to 2023 though 42 percent say the cost of flights mostly determines their choice of destination.
- Those bound for Hawai'i from March 2024 can look forward to making the trip on a Qantas Boeing 787. The modern Dreamliner will be replacing an older Airbus A330 on QF103/QF104 flights, which will also give the option of Premium Economy for travelers. To increase the offering, the 787 Business Suites will provide more of a refined version than the A330's, with one of the key improvements being a retractable panel between the middle seats so passengers travelling together can share more of the moment with their partner.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	356,298	49,419	4,847	182,278	235,881	22,283	26,084	-14.6%
Maui County	61,691	7,371	1,161	26,986	25,464	2,268	2,797	-18.9%
Maui	60,582	7,202	1,125	26,305	24,918	2,165	2,710	-20.1%
Moloka'i	4,680	703	21	1,391	1,931	102	64	59.6%
Lāna'i	6,129	718	36	1,895	2,441	124	161	-22.9%
Kaua'i	32,168	4,177	572	11,342	17,301	963	971	-0.8%
Island of Hawai'i	47,411	6,377	672	18,799	25,929	1,441	2,593	-44.4%

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 Diiro 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	Jan. 2024P	Jan. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,176	91	163	-44.4%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	18,091	21,638	-16.4%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	21,248	24,696	-14.0%
MCI (Net)	4,470	717	128	5,394	5,741	205	276	-25.5%
Convention/Conf.	3,214	575	34	2,118	2,719	173	258	-32.9%
Corp. Meetings	420	33	61	2,312	1,977	13	11	21.4%
Incentive	858	108	38	1,117	1,125	58	46	26.2%

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.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	43.5	38.1	5.4
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	56.5	61.9	-5.4

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	Jan. 2024P	Jan. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	6.50	7.90	-17.7%

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