



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.

Year-to-Date September 2024 Quick Facts^{1/}

Visitor Expenditures: \$395.5 million
 Primary Purpose of Stay: Pleasure (137,499) vs. MCI (3,220)
 Average Length of Stay: 8.82 days
 First Time Visitors: 45.4%
 Repeat Visitors: 54.6%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Sep. 2024P	YTD Sep. 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	545.8	395.5	470.7	-16.0%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,837,054	1,331,287	1,599,011	-16.7%
Arrivals	363,551	50,710	6,524	186,551	236,127	208,756	151,016	177,045	-14.7%
Average Daily Census	9,371	1,310	231	4,973	5,849	5,019	4,859	5,857	-17.0%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	297.1	297.1	294.4	0.9%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,614.7	2,619.0	2,658.8	-1.5%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.80	8.82	9.03	-2.4%

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 3, 2024).

Contact Information

Hawai'i Tourism Authority: Jennifer Bastiaanse, Brand Manager
 Tel: (808) 973-2262
jbastiaanse@gohta.net

Hawai'i Tourism Oceania: Darragh Walshe, Account Manager
 Tel: +64 (9) 977 2234
dwalshe@hawaiiitourism.co.nz

^{1/} 2024P visitor data are preliminary. 2019 to 2023 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.

Market Summary

- In the first nine months of 2024, 151,016 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$395.5 million. There were 177,045 visitors (-14.7%) in the first nine months of 2023 and visitor spending was \$470.7 million (-16.0%). In the first nine months of pre-pandemic 2019, 278,530 visitors (-45.8%) arrived from this market and visitor spending was \$689.7 million (-42.7%).
- In the first nine months of 2024, there were 604 scheduled flights with 175,889 seats from Melbourne and Sydney compared to 587 flights (+2.9%) with 177,322 seats (-0.8%) in the first nine months of 2023. Air capacity remained below the first nine months of 2019 level (893 flights, -32.4% with 280,708 seats, -37.3%) with service from Brisbane, Melbourne, and Sydney.
- There were 150 scheduled flights with 43,672 seats from Auckland in the first nine months of 2024, compared to 238 flights (-37.0%) with 68,675 seats (-36.4%) in the first nine months of 2023 and 334 flights (-55.1%) with 96,060 seats (-54.5%) in the first nine months of 2019.
- In 2023, there were 185,887 visitors from Australia, compared to 155,700 visitors (+19.4%) in 2022. There were 287,995 visitors (-35.5%) in 2019. Visitors from Australia spent \$504.7 million in 2023, compared to \$442.9 million (+14.0%) in 2022 and \$730.4 million (-30.9%) in 2019. Daily visitor spending in 2023 was \$302 per person, higher than 2022 (\$292 per person, +3.3%) and 2019 (\$268 per person, +12.8%).
- In 2023, there were 50,241 visitors from New Zealand, compared to 30,851 visitors (+62.8%) in 2022 and 75,556 visitors (-33.5%) in 2019. Visitors from New Zealand spent \$129.7 million in 2023, compared to \$75.4 million (+72.1%) in 2022 and \$167.0 million (-22.3%) in 2019. Daily visitor spending in 2023 was \$281 per person, higher than 2022 (\$252 per person, +11.4%) and 2019 (\$242 per person, +16.1%).
- In 2023, there were 787 scheduled flights with 237,995 seats from Melbourne and Sydney, compared to 660 flights (+18.3%) with 198,737 (+19.8%) seats from Melbourne and Sydney in 2022. Seat capacity continued to decrease compared to 2019 (1,189 flights, -33.8% with 369,282 seats, -35.6%) with service from Brisbane, Melbourne, and Sydney.
- In 2023, there were 316 scheduled flights with 91,190 seats from Auckland, compared to 158 flights (+100.0%) with 45,088 seats (+102.2%) in 2022 and 434 flights (-27.2%) with 125,300 seats (-27.2%) in 2019.

Market Conditions

- Australian Consumer Confidence recently hit a 19-month high (according to Roy Morgan research). While still below the 85-level benchmark, it reflects the recent improved labor market results.
- In New Zealand, the Reserve Bank of New Zealand (RBNZ) has once again cut interest rates, by .50 percent to 4.75 percent.
- During September 2024, both currencies continued their upward strengthening against the USD. Although more strengthening is needed to improve value perception. The month ended with the following values: AUD 69cents and the NZD 63cents against the USD.
- According to the Australian Bureau of Statistics, in July 2024 a total of 1,146,340 short-term trips were recorded, an increase of 150,760 trips compared with the corresponding month of the previous year. The number of trips for July 2024 was 2.1 percent higher than the pre-COVID level in July 2019.

- New Zealand-resident trips were 314,000 in July 2024, an increase of 25,200 trips from July 2023. The July 2024 figure was 92 percent of pre-COVID-19 level.
- August 2024 arrivals to Hawai'i from Australia/NZ were down 12 percent, which is likely due to reduced service by Hawaiian Airlines from year-round service to now seasonal service to New Zealand. This has reduced airlift to New Zealand by 36 percent year-to-date.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	147,873	174,063	-15.0%
Maui County	61,691	7,371	1,161	26,986	25,261	16,186	19,556	-17.2%
Maui	60,582	7,202	1,125	26,305	24,736	15,332	19,079	-19.6%
Moloka'i	4,680	703	21	1,391	1,863	1,400	1,361	2.8%
Lāna'i	6,129	718	36	1,895	2,391	1,512	1,690	-10.5%
Kaua'i	32,168	4,177	572	11,342	17,351	11,634	11,974	-2.8%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	16,240	18,417	-11.8%

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	72,637	75,735	295,296	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-13.3	-9.0	-10.3
Auckland	21,708	10,618	11,346	16,884	60,556	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-53.5	-25.0	-33.6
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	52,581	50,141	199,900	49,706	51,754	50,737	51,628	203,825	0.3	-8.6	3.6	-2.9	-1.9

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	269	233	252	267	1,021	266	278	281	278	1,103	1.1	-16.2	-10.3	-4.0	-7.4
Auckland	75	36	39	60	210	75	78	85	78	316	0.0	-53.8	-54.1	-23.1	-33.5
Melbourne	26	26	26	26	104	23	26	26	27	102	13.0	0.0	0.0	-3.7	2.0
Sydney	168	171	187	181	707	168	174	170	173	685	0.0	-1.7	10.0	4.6	3.2

Source: DBEDT analysis from Diao Mi flight schedules as of October 22, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	3,509	4,107	-14.6%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	109,272	127,196	-14.1%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	137,499	160,915	-14.6%
MCI (Net)	4,470	717	128	5,394	6,015	3,220	4,857	-33.7%
Convention/Conf.	3,214	575	34	2,118	2,758	2,468	1,822	35.5%
Corp. Meetings	420	33	61	2,312	2,161	123	2,106	-94.2%
Incentive	858	108	38	1,117	1,171	688	987	-30.3%

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	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.4	43.1	2.2
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.6	56.9	-2.2

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	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	45.88	54.61	-16.0%

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