



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 November 2024 Quick Facts^{1/}

Visitor Expenditures:	\$489.9 million
Primary Purpose of Stay:	Pleasure (169,977) vs. MCI (4,086)
Average Length of Stay:	8.75 days
First Time Visitors:	45.2%
Repeat Visitors:	54.8%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Nov. 2024P	YTD Nov. 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	534.4	489.9	576.1	-15.0%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,794,958	1,634,657	1,949,062	-16.1%
Arrivals	363,551	50,710	6,524	186,551	236,127	204,669	186,756	216,732	-13.8%
Average Daily Census	9,371	1,310	231	4,973	5,849	4,904	4,880	5,836	-16.4%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	297.7	299.7	295.6	1.4%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,610.9	2,622.9	2,658.1	-1.3%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.77	8.75	8.99	-2.7%

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 4, 2024).

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^{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 11 months of 2024, 186,756 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$489.9 million. There were 216,732 visitors (-13.8%) in the first 11 months of 2023 and visitor spending was \$576.1 million (-15.0%). In the first 11 months of pre-pandemic 2019, 334,768 visitors (-44.2%) arrived from this market and visitor spending was \$825.48 million (-40.7%).
- In the first 11 months of 2024, there were 740 scheduled flights with 214,684 seats from Melbourne and Sydney compared to 719 flights (+2.9%) with 217,381 seats (-1.2%) in the first 11 months of 2023. Air capacity remained below the first 11 months of 2019 level (1,088 flights, -32.0% with 339,403 seats, -36.7%) with service from Brisbane, Melbourne, and Sydney.
- There were 182 scheduled flights with 52,763 seats from Auckland in the first 11 months of 2024, compared to 290 flights (-37.2%) with 83,650 seats (-36.9%) in the first 11 months of 2023 and 399 flights (-54.4%) with 114,924 seats (-54.1%) in the first 11 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

- The Australian Reserve Bank has continued to leave interest rates on hold meaning interest rates have now remained unchanged at 4.35 percent for over a year since the last increase in official interest rates in late 2023.
- Roy Morgan Business Confidence is now at its most positive rating for well over two years since April 2022 and is the highest it has been since the current Albanese Government was elected in May 2022.
- Both the Australian and NZ dollars continue to weaken against the USD. The value is currently registering at AUD 64cents and the NZD 58cents against the USD.
- Travel from Oceania to Hawai'i in October 2024 surpassed September to become the second highest month of the year for arrivals (19,714). This emphasizes the value in the Oceania traveler over the shoulder season. This was still 19 percent lower than 2023 when airlift was stronger into the market.
- According to the Australian Bureau of Statistics, a total of 1,020,960 short-term trips were recorded, an increase of 81,900 trips compared with the corresponding month of the previous year. The number of trips was 2.8 percent higher than the pre-COVID level in September 2019. Indonesia was the most popular destination country, accounting for 15 percent of all resident returns.
- There were 261,300 New Zealand-resident traveler arrivals in September 2024, an increase of 6,400 from September 2023. The biggest changes were in arrivals from: Australia (up 5,800), Indonesia (up 3,300), Fiji (up 3,100), China (up 2,400), Japan (up 1,200), India (up 1,000), New Caledonia (down 1,300), United States (down 1,000).

- **Competitive Environment:** Tourism Authority of Thailand's Sydney Office recently hosted an event with panel discussion all around sustainability which was well received by the industry. Thailand is likely to be one of the most talked-about tourism destination in 2025, due to season three of popular TV drama The White Lotus being set there,
- **Travelers** are increasingly designing emotionally-driven itineraries, combining adventure with wellness to create transformative experiences. Solo travel, multi-generational trips, and off-the-beaten-path destinations are becoming increasingly popular, while "phenomenal experiences" like stargazing and nature-based activities are particularly appealing for Hawai'i.
- **Airlift:** Hawaiian Airlines celebrated the return of its seasonal non-stop flights between Auckland and Honolulu on November 16, 2024. The service operates three times a week (Tuesday, Thursday, Saturday) until April 30, 2025, on the airline's A330-300 aircraft, featuring 278 seats and complimentary high-speed Starlink Wi-Fi.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	182,678	213,300	-14.4%
Maui County	61,691	7,371	1,161	26,986	25,261	21,382	24,038	-11.0%
Maui	60,582	7,202	1,125	26,305	24,736	20,523	23,513	-12.7%
Moloka'i	4,680	703	21	1,391	1,863	1,694	1,863	-9.1%
Lāna'i	6,129	718	36	1,895	2,391	1,833	2,274	-19.4%
Kaua'i	32,168	4,177	572	11,342	17,351	15,859	16,418	-3.4%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	21,709	24,132	-10.0%

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	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 Nov. 2024P	YTD Nov. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	5,278	5,087	3.8%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	133,020	154,318	-13.8%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	169,977	197,277	-13.8%
MCI (Net)	4,470	717	128	5,394	6,015	4,086	5,764	-29.1%
Convention/Conf.	3,214	575	34	2,118	2,758	3,137	2,624	19.6%
Corp. Meetings	420	33	61	2,312	2,161	247	2,159	-88.6%
Incentive	858	108	38	1,117	1,171	763	1,039	-26.6%

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	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.2	43.0	2.3
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.8	57.0	-2.3

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.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	56.82	66.83	-15.0%

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