



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 May 2024 Quick Facts^{1/}

Visitor Expenditures: \$200.1 million
 Primary Purpose of Stay: Pleasure (71,662) vs. MCI (1,921)
 Average Length of Stay: 8.65 days
 First Time Visitors: 44.8%
 Repeat Visitors: 55.2%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD May 2024P	YTD May 2023P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	639.5	585.9	200.1	246.6	-18.9%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,167,702	1,992,855	685,647	844,616	-18.8%
Arrivals	363,551	50,710	6,524	186,551	239,558	230,655	79,291	94,185	-15.8%
Average Daily Census	9,371	1,310	231	4,973	5,939	5,445	4,511	5,593	-19.4%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	294.0	291.8	292.0	0.0%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,669.7	2,540.2	2,523.4	2,618.1	-3.6%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.05	8.64	8.65	8.97	-3.6%

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) 2024 annual forecast (Quarter 2, 2024).

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^{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.

Market Summary

- In the first five months of 2024, 79,291 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$200.1 million. There were 94,185 visitors (-15.8%) in the first five months of 2023 and visitor spending was \$246.6 million (-18.9%). In the first five months of pre-pandemic 2019, 133,172 visitors (-40.5%) arrived from this market and visitor spending was \$326.8 million (-38.8%).
- In the first five months of 2024, there were 322 scheduled flights with 94,915 seats from Melbourne and Sydney compared to 327 flights (-1.5%) with 98,487 seats (-3.6%) in the first five months of 2023. Air capacity remained below the first five months of 2019 level (475 flights, -33.0% with 149,798 seats, -36.6%) with service from Brisbane, Melbourne, and Sydney.
- There were 101 scheduled flights with 29,414 seats from Auckland in the first five months of 2024, compared to 127 flights (-20.5%) with 36,758 seats (-20.0%) in the first five months of 2023 and 175 flights (-42.3%) with 50,886 seats (-42.2%) in the first five months of 2019.
- In 2023, there were 187,101 visitors from Australia, compared to 155,700 visitors (+20.2%) in 2022. There were 287,995 visitors (-35.0%) in 2019. Visitors from Australia spent \$506.7 million in 2023, compared to \$442.9 million (+14.4%) in 2022 and \$730.4 million (-30.6%) in 2019. Daily visitor spending in 2023 was \$301 per person, higher than 2022 (\$292 per person, +3.0%) and 2019 (\$268 per person, +12.4%).
- In 2023, there were 52,457 visitors from New Zealand, compared to 30,851 visitors (+70.0%) in 2022 and 75,556 visitors (-30.6%) in 2019. Visitors from New Zealand spent \$135.2 million in 2023, compared to \$75.4 million (+79.4%) in 2022 and \$167.0 million (-19.0%) in 2019. Daily visitor spending in 2023 was \$280 per person, higher than 2022 (\$252 per person, +11.1%) and 2019 (\$242 per person, +15.7%).
- 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 AUD and NZD remained stable throughout May 2024, albeit lingering at the lower end of their historical strength against the USD. The AUD closed the month at 66 cents, while the NZD experienced some late strengthening to surpass 61 cents against the USD.
- Australia's economy expanded by 0.1 percent in the last three months leading up to March 2024. The latest GDP figures indicate a slowdown compared to the final quarter of 2023, marking the weakest quarterly growth since September 2022. However, spending on gambling, sporting events, and musical performances increased during this period.
- New Zealand's newly elected government released its inaugural budget for the country, featuring widespread tax cuts benefiting a significant portion of the population. These measures fulfill their election promise and aim to assist families grappling with the current cost of living.

- Recent data from the Australian Bureau of Statistics reveals a total of 775,630 short-term resident returns in February 2024, marking an increase of 136,060 trips compared to previous months. February 2024 trips were 4 percent higher than those recorded in February 2019 before the onset of COVID-19.
- Statistics New Zealand reports continued year-over-year growth in outbound travel from New Zealand, particularly noting a 17 percent increase in March 2024 travel. The regions experiencing the most substantial growth include Oceania and Asia.
- According to new findings from Skyscanner, over half of Australians planning winter travel have yet to book their trips. This hesitation is driven by the need to find the best travel deals in an inflationary environment. Forty percent of Australians are still searching for the most competitive prices, with 18 percent waiting for compelling last-minute offers. Only 39 percent of respondents believe they will secure a deal for under \$500 AUD this year, while 45 percent anticipate spending more than \$500 AUD on flights alone.
- Airlift between New Zealand and the continental USA faces challenges following a significant increase over the past six months. Industry analysts' predictions of oversupply appear validated, leading Delta, United, and Air New Zealand to announce reductions in flight frequencies. The influx of direct flights from NZ to the continental USA contributed to Hawaiian Airlines adjusting to seasonal service, impacting their business connections to other US cities via Hawai'i.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
O'ahu	356,298	49,419	4,847	182,278	235,881	77,835	92,410	-15.8%
Maui County	61,691	7,371	1,161	26,986	25,464	6,995	10,706	-34.7%
Maui	60,582	7,202	1,125	26,305	24,918	6,330	10,473	-39.6%
Moloka'i	4,680	703	21	1,391	1,931	910	724	25.6%
Lāna'i	6,129	718	36	1,895	2,441	732	951	-23.0%
Kaua'i	32,168	4,177	572	11,342	17,301	4,781	4,964	-3.7%
Island of Hawai'i	47,411	6,377	672	18,799	25,929	6,476	8,549	-24.3%

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	73,609	75,654	296,187	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-12.2	-9.1	-10.0
Auckland	21,708	10,618	11,427	16,803	60,556	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-53.1	-25.4	-33.6
Melbourne	8710	8710	8710	8710	34,840	7705	8710	8710	9045	34,170	13.0	0.0	0.0	-3.7	2.0
Sydney	49,873	47,305	53,472	50,141	200,791	49,706	51,754	50,737	51,628	203,825	0.3	-8.6	5.4	-2.9	-1.5

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	269	233	255	267	1,024	266	278	281	278	1,103	1.1	-16.2	-9.3	-4.0	-7.2
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	190	181	710	168	174	170	173	685	0.0	-1.7	11.8	4.6	3.6

Source: DBEDT analysis from Diio Mi flight schedules as of June 25, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,176	1,711	2,320	-26.3%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	58,044	69,224	-16.1%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	71,662	84,717	-15.4%
MCI (Net)	4,470	717	128	5,394	5,741	1,921	3,034	-36.7%
Convention/Conf.	3,214	575	34	2,118	2,719	1,469	707	107.6%
Corp. Meetings	420	33	61	2,312	1,977	68	1,800	-96.2%
Incentive	858	108	38	1,117	1,125	433	585	-26.0%

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.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	44.8	42.5	2.3
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	55.2	57.5	-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	2023P	YTD May 2024P	YTD May 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	23.21	28.60	-18.9%

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