



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 June 2024 Quick Facts^{1/}

Visitor Expenditures: \$245.5 million
 Primary Purpose of Stay: Pleasure (87,952) vs. MCI (2,093)
 Average Length of Stay: 8.68 days
 First Time Visitors: 46.1%
 Repeat Visitors: 53.9%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD June 2024P	YTD June 2023P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	639.5	585.9	245.5	298.5	-17.8%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,167,702	1,992,855	840,286	1,021,132	-17.7%
Arrivals	363,551	50,710	6,524	186,551	239,558	230,655	96,763	113,648	-14.9%
Average Daily Census	9,371	1,310	231	4,973	5,939	5,445	4,617	5,642	-18.2%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.0	294.0	292.2	292.4	-0.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,669.7	2,540.2	2,537.1	2,626.9	-3.4%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.05	8.64	8.68	8.99	-3.4%

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 2, 2024).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2279
jadie@gohta.net

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

^{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 half of 2024, 96,763 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$245.5 million. There were 113,648 visitors (-14.9%) in the first half of 2023 and visitor spending was \$298.5 million (-17.8%). In the first half of pre-pandemic 2019, 165,878 visitors (-41.7%) arrived from this market and visitor spending was \$408.9 million (-40.0%).
- In the first half of 2024, there were 391 scheduled flights with 114,598 seats from Melbourne and Sydney compared to 391 flights (0.0%) with 117,875 seats (-2.8%) in the first half of 2023. Air capacity remained below the first half of 2019 level (574 flights, -31.9% with 181,063 seats, -36.7%) with service from Brisbane, Melbourne, and Sydney.
- There were 111 scheduled flights with 32,326 seats from Auckland in the first half of 2024, compared to 153 flights (-27.5%) with 44,295 seats (-27.0%) in the first half of 2023 and 207 flights (-46.4%) with 60,028 seats (-46.1%) in the first half 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

- According to recent data from Roy Morgan, Australian Consumer Confidence rose to 81.3 points. This represents an increase of 7.2 points from the same week last year (74.1 points, June 26 - July 2, 2023), yet it remains slightly below the 2024 weekly average of 81.9 points. Inflation remains elevated in both Australia at 4.0 percent and New Zealand at 4.2 percent.
- The Australian Dollar (AUD) and New Zealand Dollar (NZD) experienced minimal fluctuations against the US Dollar in June 2024, with a slight upward trend observed for the AUD, closing the month at 67 cents and the NZD at 61 cents against the USD.
- Recent statistics from the Australia Bureau of Statistics indicate that Australian residents made 964,310 trips in April 2024, marking a 5.2 percent increase compared to pre-COVID levels for the same month. The top three destinations visited were Indonesia (133,160 trips), New Zealand (121,320 trips), and Japan (91,560 trips).
- In New Zealand, outbound travel has returned to pre-COVID levels. In April 2024, 242,100 New Zealand residents traveled internationally, with a notable preference for destinations closer to

home, particularly in Asia. This trend has impacted travel to Hawai'i, with year-to-date arrivals from Oceania recorded by DBEDT showing a 15.8 percent decline.

- A study by Marriott International on the Luxury Travel Market highlighted culinary tourism as the primary motivator for travel among affluent travelers. The research revealed that these travelers select destinations based on the quality and diversity of gastronomic experiences available.
- Hawaiian Airlines recently announced an extension of its Auckland-Honolulu seasonal service for Easter holiday travel. Flights will resume on November 15, 2024, and continue through April 30, 2025 (previously March 29). This adjustment aims to accommodate the demand during the busy travel period and provide more opportunities for Kiwis to enjoy authentic Hawaiian experiences with family and friends.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	356,298	49,419	4,847	182,278	235,881	94,834	111,553	-15.0%
Maui County	61,691	7,371	1,161	26,986	25,464	9,365	13,030	-28.1%
Maui	60,582	7,202	1,125	26,305	24,918	8,699	12,765	-31.9%
Moloka'i	4,680	703	21	1,391	1,931	914	847	8.0%
Lāna'i	6,129	718	36	1,895	2,441	765	1,123	-31.8%
Kaua'i	32,168	4,177	572	11,342	17,301	6,120	6,241	-1.9%
Island of Hawai'i	47,411	6,377	672	18,799	25,929	8,278	10,493	-21.1%

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 June 2024P	YTD June 2023P	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,176	1,872	2,692	-30.5%
True Independent (Net)	214,622	NA	5,956	138,997	171,816	70,274	83,305	-15.6%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	217,923	87,952	102,903	-14.5%
MCI (Net)	4,470	717	128	5,394	5,741	2,093	3,237	-35.3%
Convention/Conf.	3,214	575	34	2,118	2,719	1,623	823	97.2%
Corp. Meetings	420	33	61	2,312	1,977	77	1,830	-95.8%
Incentive	858	108	38	1,117	1,125	451	644	-30.1%

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 June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.7	46.1	43.5	2.6
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.3	53.9	56.5	-2.6

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.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	74.19	28.48	34.63	-17.8%

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