



# 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 July 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$292.4 million  
 Primary Purpose of Stay: Pleasure (104,739) vs. MCI (2,414)  
 Average Length of Stay: 8.71 days  
 First Time Visitors: 45.8%  
 Repeat Visitors: 54.2%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD July 2024P	YTD July 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	585.9	292.4	348.0	-16.0%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,992,855	998,380	1,192,151	-16.3%
Arrivals	363,551	50,710	6,524	186,551	236,127	230,655	114,654	132,843	-13.7%
Average Daily Census	9,371	1,310	231	4,973	5,849	5,445	4,687	5,623	-16.6%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	294.0	292.9	291.9	0.3%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,540.2	2,550.2	2,619.8	-2.7%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.64	8.71	8.97	-3.0%

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:** Jennifer Bastiaanse, Brand Manager  
 Tel: (808) 973-2262  
[jbastiaanse@gohta.net](mailto:jbastiaanse@gohta.net)

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

<sup>1/</sup> 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 seven months of 2024, 114,654 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$292.4 million. There were 132,843 visitors (-13.7%) in the first seven months of 2023 and visitor spending was \$348.0 million (-16.0%). In the first seven months of pre-pandemic 2019, 203,308 visitors (-43.6%) arrived from this market and visitor spending was \$505.5 million (-42.2%).
- In the first seven months of 2024, there were 461 scheduled flights with 134,787 seats from Melbourne and Sydney compared to 457 flights (+0.9%) with 137,914 seats (-2.3%) in the first seven months of 2023. Air capacity remained below the first seven months of 2019 level (684 flights, -32.6% with 216,043 seats, -37.6%) with service from Brisbane, Melbourne, and Sydney.
- There were 124 scheduled flights with 36,144 seats from Auckland in the first seven months of 2024, compared to 187 flights (-33.7%) with 54,194 seats (-33.3%) in the first seven months of 2023 and 257 flights (-51.8%) with 74,462 seats (-51.5%) in the first seven 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

---

- ANZ-Roy Morgan Consumer Confidence eased late July 2024 in Australia due to concerns about the Australian economy. The Reserve Bank has kept the cash rate unchanged at 4.35 percent and advised that the economic outlook is still uncertain and the process of returning inflation to target levels of 2-3 percent has been slow and bumpy.
- In New Zealand, inflation fell to 3.3 percent in second quarter of 2024, below Reserve Bank expectations of 3.6 percent. That has lifted hopes that interest rates cuts could come sooner than expected, easing the cost-of-living crunch. Unemployment has risen to 4.6 percent.
- The AUD and NZD saw a drop in value against the US Dollar in July 2024. The AUD ended the month at 65cents and the NZD 59cents against the USD.
- A total of 807,920 short-term overseas trips were recorded by Australians during May 2024. This was an increase of 14.2 percent compared to the same month of the previous year. The number of trips for May 2024 was 6.7 percent lower than the pre-COVID level in May 2019.

- Indonesia was the most popular destination country, accounting for 16 percent of all resident returns. (91,560).
- New Zealand-resident overseas travel totaled 223,400 in May 2024, increasing by 19,800 from May 2023. The biggest changes were: Australia (up 10,500), China (up 3,700), Indonesia (up 1,800), Japan (up 1,700), Cook Islands (up 1,600).
- Travel arrivals to Hawai'i from Australia/NZ have continued to reflect the decline in airlift volumes. Total arrivals were down 10 percent, influenced by New Zealand which is down 40 percent due to the halving of airlift with the change to seasonal service by Hawaiian Airlines.

## Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	112,369	130,421	-13.8%
Maui County	61,691	7,371	1,161	26,986	25,261	10,982	16,356	-32.9%
Maui	60,582	7,202	1,125	26,305	24,736	10,296	16,085	-36.0%
Moloka'i	4,680	703	21	1,391	1,863	947	980	-3.4%
Lāna'i	6,129	718	36	1,895	2,391	945	1,224	-22.8%
Kaua'i	32,168	4,177	572	11,342	17,351	7,349	7,476	-1.7%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	10,201	12,638	-19.3%

## 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
<b>OCEANIA</b>	<b>80,291</b>	<b>66,633</b>	<b>73,609</b>	<b>75,654</b>	<b>296,187</b>	<b>79,089</b>	<b>83,081</b>	<b>83,827</b>	<b>83,188</b>	<b>329,185</b>	<b>1.5</b>	<b>-19.8</b>	<b>-12.2</b>	<b>-9.1</b>	<b>-10.0</b>
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
<b>OCEANIA</b>	<b>269</b>	<b>233</b>	<b>255</b>	<b>267</b>	<b>1,024</b>	<b>266</b>	<b>278</b>	<b>281</b>	<b>278</b>	<b>1,103</b>	<b>1.1</b>	<b>-16.2</b>	<b>-9.3</b>	<b>-4.0</b>	<b>-7.2</b>
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 Dlio 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	2023	YTD July 2024P	YTD July 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	2,093	3,081	-32.0%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	83,925	97,384	-13.8%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	104,739	120,524	-13.1%
MCI (Net)	4,470	717	128	5,394	6,015	2,414	3,836	-37.1%
Convention/Conf.	3,214	575	34	2,118	2,758	1,913	1,166	64.1%
Corp. Meetings	420	33	61	2,312	2,161	96	2,028	-95.3%
Incentive	858	108	38	1,117	1,171	462	699	-33.9%

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 July 2024P	YTD July 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.8	43.1	2.7
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.2	56.9	-2.7

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 July 2024P	YTD July 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	104.48	NA	2.32	59.95	73.22	33.92	40.37	-16.0%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced)