



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 August 2024 Quick Facts^{1/}

Visitor Expenditures: \$340.8 million
 Primary Purpose of Stay: Pleasure (119,639) vs. MCI (2,745)
 Average Length of Stay: 8.80 days
 First Time Visitors: 45.3%
 Repeat Visitors: 54.7%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Aug. 2024P	YTD Aug. 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	545.8	340.8	399.9	-14.8%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,837,054	1,159,640	1,366,342	-15.1%
Arrivals	363,551	50,710	6,524	186,551	236,127	208,756	131,769	152,281	-13.5%
Average Daily Census	9,371	1,310	231	4,973	5,849	5,019	4,753	5,623	-15.5%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	297.1	293.9	292.7	0.4%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,614.7	2,586.2	2,626.0	-1.5%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.80	8.80	8.97	-1.9%

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).

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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 DIIO 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 eight months of 2024, 131,769 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$340.8 million. There were 152,281 visitors (-13.5%) in the first eight months of 2023 and visitor spending was \$399.9 million (-14.8%). In the first eight months of pre-pandemic 2019, 234,869 visitors (-43.9%) arrived from this market and visitor spending was \$587.3 million (-42.0%).
- In the first eight months of 2024, there were 533 scheduled flights with 155,418 seats from Melbourne and Sydney compared to 521 flights (+2.3%) with 157,302 seats (-1.2%) in the first eight months of 2023. Air capacity remained below the first eight months of 2019 level (779 flights, -31.6% with 245,919 seats, -36.8%) with service from Brisbane, Melbourne, and Sydney.
- There were 137 scheduled flights with 39,908 seats from Auckland in the first eight months of 2024, compared to 215 flights (-36.3%) with 62,125 seats (-35.8%) in the first eight months of 2023 and 295 flights (-53.6%) with 85,146 seats (-53.1%) in the first eight 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

- In Australia, research by Roy Morgan showed that households' confidence in their future financial situation jumped to a five-month high during August 2024 and is now back in 'positive' territory. The positive shift may be linked to monthly inflation data, which showed a fall in inflation to under 4 percent. After accelerating earlier in 2024, inflation appears to be back on the path to target.
- In New Zealand there is more good news with the Reserve Bank of New Zealand (RBNZ) cutting interest rates by 0.25 percent to 5.25 percent. This was the RBNZ's first cut to interest rates for over four years since March 2020.
- During August 2024, both the AUD and NZD increase in value against the USD reaching the highest level this year to AUD 68.2cents and NZD 62.9cents.

- According to the Australian Bureau of Statistics, in June 2024 a total of 863,950 short-term trips were recorded, an increase of 134,410 compared with the corresponding month of the previous year. The number of trips was 2.6 percent higher than the pre-COVID level in June 2019. New Zealand-resident trips were 235,000 in June 2024, increasing by 22,800 from the June 2023.
- July 2024 arrivals to Hawai'i from Australia/NZ were down 16.9 percent. Since April 2024, this decrease can be largely attributed to the withdrawal of Auckland flights by Hawaiian Airlines who are now operating only seasonal service. The New Zealand market had been 23 percent up for the first quarter, but is now down 26 percent year-to-date.
- Qantas announced that beginning in May 2025, they will commence three weekly flights between Melbourne and Honolulu. This will replace the current service by Qantas' low-cost subsidiary, Jetstar, who currently operate twice a week. It is positive news for Hawai'i as the change will target and capture the Qantas higher-spend demographic.
- Consumer Trends: Roy Morgan has released readership results for New Zealand's newspapers and magazines for the 12 months to June 2024. Both publication types continue to perform well. Nearly two-thirds (63%) of New Zealanders aged 14+, 2.71 million, now read or access newspapers in an average 7-day period via print or online (website or app) platforms. In addition, 1.68 million New Zealanders aged 14+ (39.1%) read magazines whether in print or online either via the web or an app.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	128,971	149,630	-13.8%
Maui County	61,691	7,371	1,161	26,986	25,261	14,120	17,500	-19.3%
Maui	60,582	7,202	1,125	26,305	24,736	13,271	17,109	-22.4%
Moloka'i	4,680	703	21	1,391	1,863	1,220	1,100	11.0%
Lāna'i	6,129	718	36	1,895	2,391	1,348	1,364	-1.1%
Kaua'i	32,168	4,177	572	11,342	17,351	9,812	9,010	8.9%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	13,693	14,510	-5.6%

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	73,528	75,654	296,106	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-12.3	-9.1	-10.0
Auckland	21,708	10,618	11,346	16,803	60,475	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-53.5	-25.4	-33.7
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 September 17, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	2,636	3,343	-21.1%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	96,133	110,692	-13.2%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	119,639	138,179	-13.4%
MCI (Net)	4,470	717	128	5,394	6,015	2,745	3,990	-31.2%
Convention/Conf.	3,214	575	34	2,118	2,758	2,096	1,243	68.6%
Corp. Meetings	420	33	61	2,312	2,161	109	2,038	-94.7%
Incentive	858	108	38	1,117	1,171	598	765	-21.9%

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 Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.3	43.3	2.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.7	56.7	-2.0

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.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	39.53	46.39	-14.8%

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