



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 December 2024 Quick Facts^{1/}

Visitor Expenditures:	\$541.4 million
Primary Purpose of Stay:	Pleasure (186,666) vs. MCI (4,176)
Average Length of Stay:	8.77 days
First Time Visitors:	45.1%
Repeat Visitors:	54.9%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Dec. 2024P	YTD Dec. 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	534.4	541.4	631.2	-14.2%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,794,958	1,806,999	2,135,047	-15.4%
Arrivals	363,551	50,710	6,524	186,551	236,127	204,669	206,001	236,127	-12.8%
Average Daily Census	9,371	1,310	231	4,973	5,849	4,904	4,937	5,849	-15.6%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	297.7	299.6	295.6	1.3%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,610.9	2,628.0	2,673.2	-1.7%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.77	8.77	9.04	-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 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 calendar year 2024, there were 167,221 visitors from Australia, compared to 185,887 visitors (-10.0%) in 2023 and 287,995 visitors (-41.9%) in pre-pandemic 2019. Visitors from Australia spent \$443.9 million in 2024, compared to \$504.7 million (-12.0%) in 2023 and \$730.4 million (-39.2%) in 2019. Daily visitor spending in 2024 was \$305 per person, compared to \$302 per person (+1.2%) in 2023 and \$268 per person (+14.1%) in 2019.
- In 2024, there were 38,780 visitors from New Zealand, compared to 50,241 visitors (-22.8%) in 2023 and 75,556 visitors (-48.7%) in 2019. Visitors from New Zealand spent \$100.8 million in 2024, compared to \$129.7 million (-22.3%) in 2023 and \$167.0 million (-39.6%) in 2019. Daily visitor spending in 2024 was \$285 per person, compared to \$281 per person (+1.7%) in 2023 and \$242 per person (+18.0%) in 2019.
- In 2024, there were 811 scheduled flights with 235,167 seats from Melbourne and Sydney compared to 787 flights (+3.0%) with 237,995 seats (-1.2%) in 2023. Air capacity remained below 2019 level (1,189 flights, -31.8% with 369,282 seats, -36.3%) with service from Brisbane, Melbourne, and Sydney.
- There were 209 scheduled flights with 60,254 seats from Auckland in 2024, compared to 316 flights (-33.9%) with 91,190 seats (-33.9%) in 2023 and 434 flights (-51.8%) with 125,300 seats (-51.9%) in 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

- During December 2024, the Australian Reserve Bank decided to leave interest rates unchanged again which disappointed many mortgage holders struggling with the cost of living.
- The year ended with the continuation of a recent softening of currency versus the US dollar. In fact, both the Australian and New Zealand dollars are near 5-year lows against the US Dollar. The value is currently registering at AUD 62cents and the NZD 55cents against the USD.
- According to the Australian Bureau of Statistics, for residents returning to Australia from overseas in October 2024, a total of 1,184,900 short-term trips were recorded, an increase of 123,560 compared with the corresponding month of the previous year. The number of trips was 3.4 percent higher than the pre-COVID level in October 2019.
- Indonesia was the most popular destination country, accounting for 14 percent of all resident returns. The three leading destination countries residents returned from were: Indonesia (169,110 trips), New Zealand (112,390 trips), Japan (86,080 trips).
- New Zealand-resident traveler arrivals were 319,200 in October 2024, an increase of 7,800 from October 2023. The biggest changes were in arrivals from: Australia (up 5,400), Indonesia (up 3,700), Japan (up 2,800).

- For the previous month of November 2024, the DBEDT report showed a 4.2 percent increase in visitors from Oceania (versus) 2023. This is a welcomed increase after successive months of decline. Even more pleasing was the significant increase in Neighbor Island visitation from Oceania during the month. Kaua'i up 23 percent; Maui up 34 percent; Island of Hawai'i up 28 percent.
- Consumer Trend: Tour company Viva Expeditions' has noticed an interesting trend in multi-generation travel. They are seeing more interest in soft adventure and going beyond traditional sightseeing, with families looking to bond in inspiring destinations.
- Airlift: Late December 2024 saw the release of special fares in the market as part of the popular 'Boxing Day' sales. Hawai'i was featured with competitive fares in the market. E.g., to Auckland, both Hawaiian Airlines and Air New Zealand released fares around the NZ\$1,000 level return (USD580).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	201,706	232,500	-13.2%
Maui County	61,691	7,371	1,161	26,986	25,261	22,442	25,261	-11.2%
Maui	60,582	7,202	1,125	26,305	24,736	21,512	24,736	-13.0%
Moloka'i	4,680	703	21	1,391	1,863	1,919	1,863	3.0%
Lāna'i	6,129	718	36	1,895	2,391	2,025	2,391	-15.3%
Kaua'i	32,168	4,177	572	11,342	17,351	16,693	17,351	-3.8%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	24,256	25,840	-6.1%

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	72,637	75,860	295,421	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-13.3	-8.8	-10.3
Auckland	21,708	10,618	11,346	16,582	60,254	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-53.5	-26.4	-33.9
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	50,568	200,327	49,706	51,754	50,737	51,628	203,825	0.3	-8.6	3.6	-2.1	-1.7

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	269	233	252	266	1,020	266	278	281	278	1,103	1.1	-16.2	-10.3	-4.3	-7.5
Auckland	75	36	39	59	209	75	78	85	78	316	0.0	-53.8	-54.1	-24.4	-33.9
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 Diio Mi flight schedules as of January 15, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	5,516	5,364	2.8%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	148,426	168,918	-12.1%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	186,666	214,545	-13.0%
MCI (Net)	4,470	717	128	5,394	6,015	4,176	6,015	-30.6%
Convention/Conf.	3,214	575	34	2,118	2,758	3,204	2,758	16.2%
Corp. Meetings	420	33	61	2,312	2,161	269	2,161	-87.5%
Incentive	858	108	38	1,117	1,171	764	1,171	-34.7%

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.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.1	42.8	2.3
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.9	57.2	-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 Dec. 2024P	YTD Dec. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	62.80	73.22	-14.2%

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