



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 October 2024 Quick Facts^{1/}

Visitor Expenditures: \$443.5 million
 Primary Purpose of Stay: Pleasure (155,453) vs. MCI (3,730)
 Average Length of Stay: 8.73 days
 First Time Visitors: 45.3%
 Repeat Visitors: 54.7%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Oct. 2024P	YTD Oct. 2023	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	545.8	443.5	535.4	-17.2%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,837,054	1,490,780	1,812,503	-17.8%
Arrivals	363,551	50,710	6,524	186,551	236,127	208,756	170,730	201,349	-15.2%
Average Daily Census	9,371	1,310	231	4,973	5,849	5,019	4,888	5,962	-18.0%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	297.1	297.5	295.4	0.7%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,614.7	2,597.8	2,659.1	-2.3%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.80	8.73	9.00	-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 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 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 10 months of 2024, 170,730 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$443.5 million. There were 201,349 visitors (-15.2%) in the first 10 months of 2023 and visitor spending was \$535.4 million (-17.2%). In the first 10 months of pre-pandemic 2019, 311,704 visitors (-45.2%) arrived from this market and visitor spending was \$765.7 million (-42.1%).
- In the first 10 months of 2024, there were 676 scheduled flights with 196,577 seats from Melbourne and Sydney compared to 655 flights (+3.2%) with 197,935 seats (-0.7%) in the first 10 months of 2023. Air capacity remained below the first 10 months of 2019 level (1,004 flights, -32.7% with 314,243 seats, -37.4%) with service from Brisbane, Melbourne, and Sydney.
- There were 163 scheduled flights with 47,490 seats from Auckland in the first 10 months of 2024, compared to 264 flights (-38.3%) with 76,110 seats (-37.6%) in the first 10 months of 2023 and 371 flights (-56.1%) with 106,630 seats (-55.5%) in the first 10 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 was unchanged at 86.5 staying above the mark of 85 for three consecutive weeks in October 2024 – the first time this has happened since January 2023. Consumer Confidence is now 8.7 points above the same week a year ago, October 30 – November 5, 2023 (77.8), and 4 points above the 2024 weekly average of 82.5.
- After performing strongly over recent months, both the Australian and NZ dollars weakened against the USD over the month of October 2024, leading up to the US Presidential election. The month ended with the following values: AUD 65cents and the NZD 59cents against the USD.
- For travel from Oceania to Hawai'i, September 2024 was the second highest month for arrivals (19,247). This was still 22 percent lower than 2023 when airlift was stronger into the market.
- For outbound travel from Australia, according to the Australian Bureau of Statistics, a total of 916,890 short-term trips were recorded, an increase of 58,350 trips compared with the

corresponding month of the previous year. The number of trips is now just 1.5 percent lower than the pre-COVID level in August 2019.

- The top destinations from Australia were:
 - Indonesia was the most popular, accounting for 17 percent of all resident returns.
 - The three leading destination countries residents returned from: Indonesia (158,730 trips); New Zealand (106,450) and The UK (62,930).
- For outbound travel from New Zealand by residents, there were 255,900 trips recorded in August 2024, an increase of 14,700 trips from August 2023.
 - The total number of New Zealand-resident trips in August 2024 was 90 percent of the 284,500 in August 2019 (before the COVID-19 pandemic).
 - The biggest changes were in arrivals from New Zealand to Australia (up 8,900) and Indonesia (up 4,100)
 - Decreases were seen in Fiji (down 1,900) and New Caledonia which has been experiencing an increase in unrest by citizens in 2024 (down 1,900).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	167,013	198,073	-15.7%
Maui County	61,691	7,371	1,161	26,986	25,261	18,870	22,133	-14.7%
Maui	60,582	7,202	1,125	26,305	24,736	18,011	21,633	-16.7%
Moloka'i	4,680	703	21	1,391	1,863	1,608	1,567	2.6%
Lāna'i	6,129	718	36	1,895	2,391	1,697	1,963	-13.6%
Kaua'i	32,168	4,177	572	11,342	17,351	13,677	14,643	-6.6%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	19,094	22,086	-13.5%

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	75,735	295,296	79,089	83,081	83,827	83,188	329,185	1.5	-19.8	-13.3	-9.0	-10.3
Auckland	21,708	10,618	11,346	16,884	60,556	21,678	22,617	24,380	22,515	91,190	0.1	-53.1	-53.5	-25.0	-33.6
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	50,141	199,900	49,706	51,754	50,737	51,628	203,825	0.3	-8.6	3.6	-2.9	-1.9

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	269	233	252	267	1,021	266	278	281	278	1,103	1.1	-16.2	-10.3	-4.0	-7.4
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	187	181	707	168	174	170	173	685	0.0	-1.7	10.0	4.6	3.2

Source: DBEDT analysis from Diiro Mi flight schedules as of October 22, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
Group vs True Independent (Net)								
Group Tour	7,017	NA	72	2,670	5,364	4,549	4,639	-1.9%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	121,986	143,807	-15.2%
Leisure vs Business								
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	155,453	183,078	-15.1%
MCI (Net)	4,470	717	128	5,394	6,015	3,730	5,485	-32.0%
Convention/Conf.	3,214	575	34	2,118	2,758	2,895	2,363	22.5%
Corp. Meetings	420	33	61	2,312	2,161	163	2,150	-92.4%
Incentive	858	108	38	1,117	1,171	733	1,030	-28.9%

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 Oct. 2024P	YTD Oct. 2023	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.3	43.2	2.1
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.7	56.8	-2.1

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.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	51.45	62.11	-17.2%

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