



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 2025 Quick Facts^{1/}

Visitor Expenditures:	\$220.6 million
Primary Purpose of Stay:	Pleasure (79,839) vs. MCI (1,721)
Average Length of Stay:	8.60 days
First Time Visitors:	45.1%
Repeat Visitors:	54.9%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD June 2025P	YTD June 2024RP	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	542.9	520.2	220.6	247.0	-10.7%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,812,120	1,715,999	752,753	845,407	-11.0%
Arrivals	363,551	50,710	6,524	186,551	236,127	206,626	196,789	87,486	97,388	-10.2%
Average Daily Census	9,371	1,310	231	4,973	5,849	4,951	4,701	4,159	4,645	-10.5%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	299.6	303.2	293.1	292.2	0.3%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,627.3	2,643.6	2,521.5	2,536.1	-0.6%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.77	8.72	8.60	8.68	-0.9%

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.

*Department of Business, Economic Development & Tourism (DBEDT) 2025 annual forecast (Quarter 2, 2025).

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

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^{1/} 2024P and 2025P 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 half of 2025, there were 69,933 visitors from Australia, compared to 79,285 visitors (-11.8%) in the first half of 2024 and 132,710 visitors (-47.3%) in the first half of pre-pandemic 2019. Visitors from Australia spent \$176.7 million in the first half of 2025, compared to \$202.5 million (-12.8%) in the first half of 2024 and \$335.0 million (-47.3%) in the first half of 2019. Daily visitor spending in the first half of 2025 was \$298 per person, compared to \$297 per person (+0.2%) in the first half of 2024 and \$269 per person (+11.0%) in the first half of 2019.
- In the first half of 2025, there were 17,553 visitors from New Zealand, compared to 18,103 visitors (-3.0%) in the first half of 2024 and 33,167 visitors (-47.1%) in the first half of 2019. Visitors from New Zealand spent \$43.9 million in the first half of 2025, compared to \$46.6 million (-5.9%) in the first half of 2024 and \$75.5 million (-41.9%) in the first half of 2019. Daily visitor spending in the first half of 2025 was \$274 per person, compared to \$283 per person (-3.2%) in the first half of 2024 and \$250 per person (+9.7%) in the first half of 2019.
- In the first half of 2025, there were 396 scheduled flights with 110,159 seats from Melbourne and Sydney compared to 391 flights with 114,598 seats from Melbourne and Sydney in the first half of 2024. Air capacity remained below the first half of 2019 level (574 flights with 181,063 seats) with service from Brisbane, Melbourne, and Sydney.
- There were 110 scheduled flights with 30,712 seats from Auckland in the first half of 2025, compared to 114 flights with 32,410 seats in the first half of 2024 and 207 flights with 60,028 seats in the first half of 2019.
- In 2024, there were 167,718 visitors from Australia, compared to 185,887 visitors in 2023 and 287,995 visitors in 2019. Visitors from Australia spent \$445.1 million in 2024, compared to \$504.7 million in 2023 and \$730.4 million in 2019. Daily visitor spending in 2024 was \$305 per person, compared to \$302 per person in 2023 and \$268 per person in 2019.
- In 2024, there were 38,908 visitors from New Zealand, compared to 50,241 visitors in 2023 and 75,556 visitors in 2019. Visitors from New Zealand spent \$101.2 million in 2024, compared to \$129.7 million in 2023 and \$167.0 million in 2019. Daily visitor spending in 2024 was \$285 per person, compared to \$281 per person in 2023 and \$242 per person 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.

Market Conditions (Updated Quarterly)

Currency/Economy.

- January 2025 - The strong US Dollar continued to have a negative effect on the local AU and NZ currencies. January saw a large amount of fluctuations related to policy announcements from the US, a key trading partner for the region. The value at month-end was AUD 62cents and the NZD 56cents against the USD. January 2025 - Australia's GDP reached approximately \$1.84 trillion, marking a 2.0 percent growth rate.
- February 2025 - Just like the rest of the world, Australia and New Zealand have seen some dramatic effects of the recent Trade Tarriff announcements from the United States and volatility, further weakening against the USD. Even though both Australia and New Zealand were at the lower end of the original applied tariff scale announcement (at 10%), they are seeing the overall influence of the effects on global economies. February 2025 exchange rate dipped to approximately AUD 0.60cents and NZD 55cents versus the USD.

- March 2025 - Both countries have continued to brace for continued economic volatility while implementing measures to stabilize their economies and maintain growth. While the exchange rate stayed the same as the prior month, Australia's GDP growth has slowed to a modest 1.8 percent year-over-year, reflecting the impact of recent trade tariffs imposed by the United States. The inflation rate spiked to 4.2 percent, driven by increased costs of imports and energy prices. Politically, Australia was navigating its response to the tariffs while also addressing internal debates on climate policy and energy transition.
- New Zealand experienced a similar economic landscape, with GDP growth at 2.1 percent and inflation reaching 3.9 percent. On the political front, New Zealand's government focused on strengthening trade relationships with Asia-Pacific countries to mitigate the adverse effects of the tariffs and to diversify its export markets.
- ANZ-Roy Morgan Australian Consumer Confidence rose 2.5pts during January 2025 to 88.5pts, its highest level since May 2022. Households are feeling more confident about the economic outlook, with short-term economic confidence rising to its highest level since April 2022, while economic confidence over the next five years reached a 12-month high.

Airlift (Specific to Hawai'i)

- Hawaiian Airlines has confirmed the dates for their next seasonal schedule between New Zealand and Hawai'i. The current 3 x weekly service paused April 30, 2025, and will return November 18, 2025.

Outbound Travel Market

- New Zealand-resident travelers (outbound) were 330,300 - which was a record-breaking month in January 2025 (the highest travel in any recorded month was in July 2018 with 345,100 traveler arrivals), thus an increase of 2,100 from January 2024. The biggest changes were in arrivals from: Australia (up 6,500), Indonesia (up 2,700), Philippines (up 2,200), India (up 2,000), Japan (up 2,000), China (down 3,000), Notably the USA was down 4.9 percent.
- Japan Airlines Flight Reductions: Japan Airlines announced a reduction in its Melbourne-Tokyo (Narita) service from six flights per week to three, effective March 30, 2025, to October 25, 2025.
- A Roy Morgan survey indicated that 23 percent of Australians plan to travel overseas within the next 12 months, up from 16 percent in October 2022.

From DBEDT findings

- January 2025 - Arrivals of 20,860 visitors were down by 8 percent from January 2024. The statistics reveal an increase in per person per trip spend (up 6%) as well as an increase in multiple island visitation – up 14 percent.
- February 2025 - Arrivals were down by 20 percent from February 2024. The most positive statistic was the increase in Neighbor Island visitation, with over 20 percent of visitors incorporating a multi-island stay.

Competitive Environment

- Fiji has achieved a historic milestone in tourism, welcoming more than one million visitors in 2024 – the highest annual total ever recorded in the country. A total of 982,938 tourists arrived by air, while 81,854 travelers visited via cruise ships, surpassing the initial target of 966,930. Notably, the number of U.S. visitors reached 107,821, reflecting an 8 percent rise from 2023 and marking the first time Fiji has crossed the one-million-visitor threshold.
- Strong growth was also seen from Australia, New Zealand and China.

Consumer Trends (Only trends that could have an impact on travel)

- Despite rising living costs, Australians continue to prioritize travel. A survey indicated that 78% plan to take up to three holidays in 2025, with 68% selecting destinations that match their budgets. Additionally, 44% intend to use reward points to offset travel expenses.

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	202,321	85,923	95,449	-10.0%
Maui County	61,691	7,371	1,161	26,986	25,261	22,483	9,143	9,405	-2.8%
Maui	60,582	7,202	1,125	26,305	24,736	21,544	8,917	8,731	2.1%
Moloka'i	4,680	703	21	1,391	1,863	1,927	767	922	-16.8%
Lāna'i	6,129	718	36	1,895	2,391	2,029	1,196	769	55.5%
Kaua'i	32,168	4,177	572	11,342	17,351	16,723	5,917	6,150	-3.8%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	24,305	9,076	8,327	9.0%

P=Preliminary data. RP=March 2024 preliminary data were revised.

Airlift: Scheduled Seats and Flights

Scheduled seats	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	73,442	67,429	67,753	67,007	275,631	80,291	66,717	72,637	75,860	295,505	-8.5	1.1	-6.7	-11.7	-6.7
Auckland	19,879	10,833	10,800	16,219	57,731	21,708	10,702	11,346	16,582	60,338	-8.4	1.2	-4.8	-2.2	-4.3
Melbourne	8,040	9,729	10,200	9,945	37,914	8,710	8,710	8,710	8,710	34,840	-7.7	11.7	17.1	14.2	8.8
Sydney	45,523	46,867	46,753	40,843	179,986	49,873	47,305	52,581	50,568	200,327	-8.7	-0.9	-11.1	-19.2	-10.2

Scheduled flights	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	262	244	249	245	1,000	269	236	252	266	1,023	-2.6	3.4	-1.2	-7.9	-2.2
Auckland	71	39	39	59	208	75	39	39	59	212	-5.3	0.0	0.0	0.0	-1.9
Melbourne	24	35	40	39	138	26	26	26	26	104	-7.7	34.6	53.8	50.0	32.7
Sydney	167	170	170	147	654	168	171	187	181	707	-0.6	-0.6	-9.1	-18.8	-7.5

Source: DBEDT analysis from Diio Mi flight schedules as of July 24, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	7,017	NA	72	2,670	5,364	5,535	1,697	1,891	-10.2%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	148,867	62,846	70,714	-11.1%
Leisure vs Business									
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	187,225	79,839	88,511	-9.8%
MCI (Net)	4,470	717	128	5,394	6,015	4,196	1,721	2,113	-18.6%
Convention/Conf.	3,214	575	34	2,118	2,758	3,217	1,101	1,636	-32.7%
Corp. Meetings	420	33	61	2,312	2,161	270	171	77	121.9%
Incentive	858	108	38	1,117	1,171	770	454	457	-0.6%

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.

P=Preliminary data. RP=March 2024 preliminary data were revised.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.1	45.1	46.1	-1.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.9	54.9	53.9	1.0

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.

P=Preliminary data. RP=March 2024 preliminary data were revised.

Tax Revenue

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD June 2025P	YTD June 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	62.97	25.59	28.65	-10.7%

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

P=Preliminary data. RP=March 2024 preliminary data were revised.