



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 February 2025 Quick Facts^{1/}

Visitor Expenditures: \$86.2 million
 Primary Purpose of Stay: Pleasure (30,216) vs. MCI (413)
 Average Length of Stay: 9.00 days
 First Time Visitors: 38.9%
 Repeat Visitors: 61.1%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024P	2025 Annual Forecast*	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	541.4	531.3	86.2	96.7	-10.9%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,806,999	1,752,400	296,003	337,455	-12.3%
Arrivals	363,551	50,710	6,524	186,551	236,127	206,001	200,963	32,898	37,971	-13.4%
Average Daily Census	9,371	1,310	231	4,973	5,849	4,937	4,801	5,017	5,624	-10.8%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	299.6	303.2	291.2	286.6	1.6%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,628.0	2,643.8	2,619.9	2,547.3	2.9%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.77	8.72	9.00	8.89	1.2%

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.

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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 two months of 2025, there were 25,595 visitors from Australia, compared to 30,788 visitors (-16.9%) in the first two months of 2024 and 40,831 visitors (-37.3%) in the first two months of pre-pandemic 2019. Visitors from Australia spent \$66.3 million in the first two months of 2025, compared to \$80.1 million (-17.2%) in the first two months of 2024 and \$102.5 million (-35.3%) in the first two months of 2019. Daily visitor spending in the first two months of 2025 was \$297 per person, compared to \$293 per person (+1.4%) in the first two months of 2024 and \$263 per person (+13.1%) in the first two months of 2019.
- In the first two months of 2025, there were 7,303 visitors from New Zealand, compared to 7,183 visitors (+1.7%) in the first two months of 2024 and 7,533 visitors (-3.1%) in the first two months of 2019. Visitors from New Zealand spent \$19.7 million in the first two months of 2025, compared to \$17.5 million (+12.6%) in the first two months of 2024 and \$16.1 million (+22.8%) in the first two months of 2019. Daily visitor spending in the first two months of 2025 was \$271 per person, compared to \$273 per person (-0.8%) in the first two months of 2024 and \$239 per person (+13.4%) in the first two months of 2019.
- In the first two months of 2025, there were 132 scheduled flights with 37,131 seats from Melbourne and Sydney compared to 134 flights (-1.5%) with 40,577 seats (-8.5%) in the first two months of 2024. Air capacity remained below the first two months of 2019 level (188 flights, -29.8% with 59,381 seats, -37.5%) with service from Brisbane, Melbourne, and Sydney.
- There were 49 scheduled flights with 13,739 seats from Auckland in the first two months of 2025, compared to 48 flights (+2.1%) with 13,893 seats (-1.1%) in the first two months of 2024 and 67 flights (-26.9%) with 19,782 seats (-30.5%) in the first two months of 2019.
- In 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.

Market Conditions

- Economy: ANZ-Roy Morgan Australian Consumer Confidence rose 2.5 points during January 2025 to 88.5, 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. This gain in confidence was influenced by a decline in weekly inflation expectations as well as discussion that the Royal Bank of Australia could cut interest rates in February 2025.
- Currency. The strong US Dollar continues to have a negative effect on the local AU and NZ currencies. The month saw a large number 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.

- **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.
- **Outbound Travel:** DBEDT recorded arrivals for the month of December 2024 revealed a similar month to arrivals in 2023 (19,245 vs. 19,395). This was helped by the return of Hawaiian Airlines to the New Zealand route for the Northern Hemisphere winter. The absence of HA over the remainder of the year was largely the reason for a fall in year-to-date arrivals, down 12.8 percent. Total arrivals for the calendar year from Oceania were 206,000 visitors.
- **For Australian residents returning from overseas in November 2024:** A total of 912,430 short-term trips were recorded, an increase of 91,670 compared with the corresponding month of the previous year. The number of trips was 7.4 percent higher than the pre-COVID level in November 2019.
- **Indonesia** was the most popular destination country, accounting for 15 percent of all resident returns (134,950 trips). Followed by New Zealand (113,590 trips), and Japan (72,060 trips).
- **New Zealand-resident overseas travelers** were 231,800 in November 2024, an increase of 5,000 from November 2023. And 99 percent of pre-covid levels. The biggest changes were: Australia (up 7,600), China (up 3,600), Japan (up 2,800), Indonesia (up 2,400) and India (up 1,800).

Distribution by Island

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	201,706	32,210	37,106	-13.2%
Maui County	61,691	7,371	1,161	26,986	25,261	22,442	3,699	3,768	-1.8%
Maui	60,582	7,202	1,125	26,305	24,736	21,512	3,663	3,581	2.3%
Moloka'i	4,680	703	21	1,391	1,863	1,919	366	262	40.0%
Lāna'i	6,129	718	36	1,895	2,391	2,025	387	472	-18.0%
Kaua'i	32,168	4,177	572	11,342	17,351	16,693	2,602	2,392	8.8%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	24,256	3,261	2,818	15.7%

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	74,668	72,155	68,886	74,278	289,987	80,291	66,633	72,637	75,860	295,421	-7.0	8.3	-5.2	-2.1	-1.8
Auckland	20,157	14,695	11,933	16,282	63,067	21,708	10,618	11,346	16,582	60,254	-7.1	38.4	5.2	-1.8	4.7
Melbourne	8,710	9,645	10,200	9,945	38,500	8,710	8,710	8,710	8,710	34,840	0.0	10.7	17.1	14.2	10.5
Sydney	45,801	47,815	46,753	48,051	188,420	49,873	47,305	52,581	50,568	200,327	-8.2	1.1	-11.1	-5.0	-5.9

Scheduled flights	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	266	261	253	272	1,052	269	233	252	266	1,020	-1.1	12.0	0.4	2.3	3.1
Auckland	72	53	43	59	227	75	36	39	59	209	-4.0	47.2	10.3	0.0	8.6
Melbourne	26	35	40	39	140	26	26	26	26	104	0.0	34.6	53.8	50.0	34.6
Sydney	168	173	170	174	685	168	171	187	181	707	0.0	1.2	-9.1	-3.9	-3.1

Source: DBEDT analysis from Diio Mi flight schedules as of February 21, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Group vs True Independent (Net)									
Group Tour	7,017	NA	72	2,670	5,364	5,516	109	265	-59.0%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	148,426	25,112	29,110	-13.7%
Leisure vs Business									
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	186,666	30,216	34,889	-13.4%
MCI (Net)	4,470	717	128	5,394	6,015	4,176	413	731	-43.5%
Convention/Conf.	3,214	575	34	2,118	2,758	3,204	343	642	-46.6%
Corp. Meetings	420	33	61	2,312	2,161	269	29	25	17.6%
Incentive	858	108	38	1,117	1,171	764	42	103	-59.5%

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	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.1	38.9	44.9	-6.0
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.9	61.1	55.1	6.0

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	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	62.80	10.00	11.22	-10.9%

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