



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 March 2025 Quick Facts^{1/}

Visitor Expenditures: \$124.4 million
 Primary Purpose of Stay: Pleasure (44,257) vs. MCI (761)
 Average Length of Stay: 8.84 days
 First Time Visitors: 43.4%
 Repeat Visitors: 56.6%

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Visitor Expenditures (\$ Millions)	895.1	NA	19.8	516.8	631.2	542.3	531.3	124.4	132.9	-6.4%
Visitor Days	3,420,593	479,534	84,413	1,815,212	2,135,047	1,810,293	1,752,400	427,216	461,361	-7.4%
Arrivals	363,551	50,710	6,524	186,551	236,127	206,398	200,963	48,326	52,900	-8.6%
Average Daily Census	9,371	1,310	231	4,973	5,849	4,946	4,801	4,747	5,070	-6.4%
Per Person Per Day Spending (\$)	261.7	NA	235.1	284.7	295.6	299.6	303.2	291.1	288.0	1.1%
Per Person Per Trip Spending (\$)	2,462.1	NA	3,041.5	2,770.4	2,673.2	2,627.6	2,643.8	2,573.2	2,511.6	2.5%
Length of Stay (days)	9.41	9.46	12.94	9.73	9.04	8.77	8.72	8.84	8.72	1.4%

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.
 P=Preliminary data. RP=March 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 quarter of 2025, there were 37,459 visitors from Australia, compared to 42,116 visitors (-11.1%) in the first quarter of 2024 and 57,361 visitors (-34.7%) in the first quarter of pre-pandemic 2019. Visitors from Australia spent \$95.9 million in the first quarter of 2025, compared to \$107.0 million (-10.5%) in the first quarter of 2024 and \$148.4 million (-35.4%) in the first quarter of 2019. Daily visitor spending in the first quarter of 2025 was \$296 per person, compared to \$293 per person (+0.9%) in the first quarter of 2024 and \$270 per person (+9.8%) in the first quarter of 2019.
- In the first quarter of 2025, there were 10,867 visitors from New Zealand, compared to 10,785 visitors (+0.8%) in the first quarter of 2024 and 11,237 visitors (-3.3%) in the first quarter of 2019. Visitors from New Zealand spent \$28.1 million in the first quarter of 2025, compared to \$26.8 million (+5.0%) in the first quarter of 2024 and \$23.0 million (+22.5%) in the first quarter of 2019. Daily visitor spending in the first quarter of 2025 was \$272 per person, compared to \$278 per person (-2.1%) in the first quarter of 2024 and \$234 per person (+16.2%) in the first quarter of 2019.
- In the first quarter of 2025, there were 191 scheduled flights with 53,563 seats from Melbourne and Sydney compared to 194 flights with 58,583 seats in the first quarter of 2024. Air capacity remained below the first quarter of 2019 level (274 flights with 86,201 seats) with service from Brisbane, Melbourne, and Sydney.
- There were 71 scheduled flights with 19,879 seats from Auckland in the first quarter of 2025, compared to 75 flights with 21,708 seats in the first quarter of 2024 and 101 flights with 29,744 seats in the first quarter of 2019.
- In 2024, there were 167,522 visitors from Australia, compared to 185,887 visitors in 2023 and 287,995 visitors in 2019. Visitors from Australia spent \$444.6 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 38,876 visitors from New Zealand, compared to 50,241 visitors in 2023 and 75,556 visitors in 2019. Visitors from New Zealand spent \$101.1 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

- 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	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
O'ahu	356,298	49,419	4,847	182,278	232,500	202,097	47,420	51,823	-8.5%
Maui County	61,691	7,371	1,161	26,986	25,261	22,472	5,453	4,871	12.0%
Maui	60,582	7,202	1,125	26,305	24,736	21,536	5,376	4,466	20.4%
Moloka'i	4,680	703	21	1,391	1,863	1,927	403	552	-27.0%
Lāna'i	6,129	718	36	1,895	2,391	2,027	468	541	-13.5%
Kaua'i	32,168	4,177	572	11,342	17,351	16,706	3,635	2,863	27.0%
Island of Hawai'i	47,411	6,377	672	18,799	25,840	24,293	5,100	4,203	21.3%

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	71,949	67,705	74,278	287,374	80,291	66,633	72,637	75,860	295,421	-8.5	8.0	-6.8	-2.1	-2.7
Auckland	19,879	14,447	10,752	16,282	61,360	21,708	10,618	11,346	16,582	60,254	-8.4	36.1	-5.2	-1.8	1.8
Melbourne	8,040	9,687	10,200	9,945	37,872	8,710	8,710	8,710	8,710	34,840	-7.7	11.2	17.1	14.2	8.7
Sydney	45,523	47,815	46,753	48,051	188,142	49,873	47,305	52,581	50,568	200,327	-8.7	1.1	-11.1	-5.0	-6.1

Scheduled flights	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	262	260	249	272	1,043	269	233	252	266	1,020	-2.6	11.6	-1.2	2.3	2.3
Auckland	71	52	39	59	221	75	36	39	59	209	-5.3	44.4	0.0	0.0	5.7
Melbourne	24	35	40	39	138	26	26	26	26	104	-7.7	34.6	53.8	50.0	32.7
Sydney	167	173	170	174	684	168	171	187	181	707	-0.6	1.2	-9.1	-3.9	-3.3

Source: DBEDT analysis from Diio Mi flight schedules as of April 25, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	7,017	NA	72	2,670	5,364	5,532	349	849	-58.9%
True Independent (Net)	214,622	NA	5,956	138,997	168,918	148,701	35,775	39,434	-9.3%
Leisure vs Business									
Pleasure (Net)	339,605	46,357	4,978	170,983	214,545	187,011	44,257	47,868	-7.5%
MCI (Net)	4,470	717	128	5,394	6,015	4,194	761	1,398	-45.6%
Convention/Conf.	3,214	575	34	2,118	2,758	3,216	444	1,116	-60.2%
Corp. Meetings	420	33	61	2,312	2,161	270	80	33	145.7%
Incentive	858	108	38	1,117	1,171	769	240	289	-16.9%

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.
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 Mar. 2025P	YTD Mar. 2024RP	% Change
First Time Visitors (%)	47.0	NA	57.1	36.7	42.8	45.1	43.4	44.8	-1.4
Repeat Visitors (%)	53.0	NA	42.9	63.3	57.2	54.9	56.6	55.2	1.4

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 Mar. 2025P	YTD Mar. 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	104.48	NA	2.32	59.95	73.22	62.91	14.43	15.41	-6.4%

^{2/}State government tax revenue generated (direct, indirect, and induced)
P=Preliminary data. RP=March 2024 preliminary data were revised.