



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. Emphasis is placed on Hawai'i and Oceania's close relationship as Pacific neighbors, connected through voyaging traditions, ocean currents, and a shared kuleana to care for the ocean. Partnerships are key in this market, including Hawai'i's presence at the annual Duke's Day in Sydney, celebrating Duke Kahanamoku through surfing, Hawaiian cultural performances, and ocean conservation activities.

Rooted in shared values of heritage, culture, and environmental stewardship, the Australia and New Zealand markets share a strong affinity with Hawai'i, reinforced by a mutual understanding of the concept of kuleana, central to Hawai'i's identity. Travelers from the region increasingly seek meaningful, experience-driven getaways that balance relaxation with cultural immersion, sustainability, wellness, and authenticity. Family-friendly outdoor adventures and cultural exploration consistently rank high among their preferences, with popular activities including hiking, cultural tours, water sports, food and wine experiences, and wellness escapes.

Year-to-Date February 2026 Quick Facts^{1/}

Visitor Expenditures: \$73.9 million
 Primary Purpose of Stay: Pleasure (24,693) vs. MCI (727)
 Average Length of Stay: 8.77 days
 First Time Visitors: 46.0%
 Repeat Visitors: 54.0%

OCEANIA MMA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
Visitor Expenditures (\$ Millions)	NA	19.8	516.8	631.2	535.9	474.9	463.5	73.9	86.2	-14.3%
Visitor Days	479,534	84,413	1,815,212	2,135,047	1,784,211	1,560,706	1,496,995	240,074	296,003	-18.9%
Arrivals	50,710	6,524	186,551	236,127	203,473	176,052	169,010	27,376	32,898	-16.8%
Average Daily Census	1,310	231	4,973	5,849	4,875	4,276	4,101	4,069	5,017	-18.9%
Per Person Per Day Spending (\$)	NA	235.1	284.7	295.6	300.4	304.3	309.6	307.8	291.2	5.7%
Per Person Per Trip Spending (\$)	NA	3,041.5	2,770.4	2,673.2	2,633.8	2,697.5	2,742.2	2,699.4	2,619.9	3.0%
Length of Stay (days)	9.46	12.94	9.73	9.04	8.77	8.87	8.86	8.77	9.00	-2.5%

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) 2026 annual forecast (Quarter 1, 2026).

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^{1/} 2026P and 2025P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

^{2/} Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

Market Summary

- In the first two months of 2026, there were 22,308 visitors from Australia, compared to 25,595 visitors (-12.8%) in the first two months of 2025. Visitors from Australia spent \$61.4 million in the first two months of 2026, compared to \$66.3 million (-7.4%) in the first two months of 2025. Daily visitor spending in the first two months of 2026 was \$310 per person, compared to \$297 per person (+4.2%) in the first two months of 2025.
- In the first two months of 2026, there were 5,068 visitors from New Zealand, compared to 7,303 visitors (-30.6%) in the first two months of 2025. Visitors from New Zealand spent \$9.9 million in the first two months of 2026, compared to \$19.7 million (-49.9%) in the first two months of 2025. Daily visitor spending in the first two months of 2026 was \$236 per person, compared to \$271 per person (-13.0%) in the first two months of 2025.
- In the first two months of 2026, there were 111 scheduled flights with 30,662 seats from Melbourne and Sydney compared to 131 flights (-15.3%) with 36,796 seats (-16.7%) in the first two months of 2025.
- There were 47 scheduled flights with 13,003 seats from Auckland in the first two months of 2026, compared to 48 flights (-2.1%) with 13,162 seats (-1.2%) in the first two months of 2025.
- In 2025, there were 142,587 visitors from Australia, total visitor spending was \$392.0 million and daily visitor spending was \$312 per person.
- In 2025, there were 33,465 visitors from New Zealand, total visitor spending was \$82.1 million and daily visitor spending was \$270 per person.
- In 2025, there were 779 scheduled flights with 213,334 seats from Melbourne and Sydney.
- There were 207 scheduled flights with 57,420 seats from Auckland in 2025.

Market Conditions (Updated Quarterly)

Economy

- Australia:
 - Australia's GDP grew 2.1 percent year-on-year (September quarter), with quarterly growth slowing to 0.4 percent.
 - The Australian dollar remained subdued against the US dollar through December 2025, continuing to erode outbound purchasing power for long-haul US travel.
 - Underlying inflation remained around the RBA's 2–3 percent target band, though with some caution through 2026.
 - Consumer confidence fell sharply in December 2025, reversing November gains and reinforcing cautious discretionary spending into early 2026.
- New Zealand:
 - New Zealand's GDP rebounded 1.1 percent quarter-on-quarter in the September 2025 quarter, following a contraction in June. However, on an annual basis GDP was still down ~0.5 percent year-on-year, reflecting the lingering impact of the earlier recession and weak per-capita growth.
 - The New Zealand dollar remained weak against the US dollar through December 2025, reflecting soft near-term growth and ongoing monetary easing, which improved export competitiveness but continued to raise the cost of US-priced imports and long-haul travel.
 - Confidence improved modestly in December 2025, supported by falling interest rates and stronger GDP momentum, though sentiment remained fragile and uneven across sectors following a prolonged downturn in household spending and construction.

Airlift

- Disappointingly, during December 2025, Qantas announced that they would withdraw from the Melbourne-Honolulu route. This withdrawal reflects a softness out of Melbourne, but Qantas have partially countered this reduction with an increase out of the Sydney market. With additional SYD frequency (extra 1-2 flights) plus up-gauged aircraft, the difference year over year equates to approximately 1 weekly flight reduction.
- Qantas SYD–HNL data indicates passenger growth of 7 percent in Oct–Dec 2025, 1 percent in Jan–Mar 2026, and a decrease of 2 percent in Apr–Jun 2026. Hawaiian Airlines resumed its seasonal Auckland–Honolulu service on November 18, 2025, operating three times weekly through April 2026. NZ Country Manager for Hawaiian Airlines left in November, with ongoing management and operations for the NZ market now handled by the Sydney office.

Hawai'i Trends

- Over 70 percent of Hawai'i-bound travelers seek eco-conscious and culturally immersive experiences.
- Visitor numbers have been impacted by a decrease in airlift along with a weak economy.

Competitive Environment

- Improved air access from Australia (including Cairns-Nadi) strengthened Fiji and Pacific island demand for both leisure and US-bound transit/stopover travel.
- Thailand maintained relevance through wellness, value and high-volume leisure appeal, although trade reporting showed short-term volatility month-to-month due to pricing and competition from Japan and Vietnam.
- The Philippines is gaining traction, with a 57 percent rise in demand from Australian travelers (Klook).

Consumer Trends

- Experience-led travel dominated Australian tourism demand, with theme parks, food-driven travel and immersive experiences ranking highest in December booking data.
- According to Europ Assistance Travel Insurance, 62 percent of Australians now prefer to explore off-the-beaten-path locations, reflecting a shift toward lesser-known destinations rather than traditional hotspots (travelweekly.com.au).
- An Expedia study found that 71 percent of travelers say video content influenced their travel decisions, compared to just 24 percent for static images (Expedia Group 2025).
- 41 percent of travelers say AI-generated content is useful only when combined with human input, emphasizing that while technology is valued, authenticity and human touch remain key (Expedia Group 2025).

Travel Trends

- Video is dominating travel inspiration: In Australia, younger generations (Gen Z & Millennials) especially respond to influencer and video-led formats (travelweekly.com.au).
- Authentic tone and inclusive representation matter: Transparency (52%), clarity (46%) and authenticity (45%) were the top-ranked messaging tones that build trust in travel content (Expedia Group 2025).
- Destination experience matters: Australians' enjoyment of travel is increasingly driven by cultural immersion – 47 percent say experiencing different cultures and trying new food is what they enjoy most (travelweekly.com.au).

Distribution by Island

OCEANIA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	49,419	4,847	182,278	232,500	199,263	169,253	25,193	32,210	-21.8%
Maui County	7,371	1,161	26,986	25,261	22,199	23,939	4,510	3,699	21.9%
Maui	7,202	1,125	26,305	24,736	21,305	23,591	4,510	3,663	23.1%
Moloka'i	703	21	1,391	1,863	1,924	1,576	0	366	-100.0%
Lāna'i	718	36	1,895	2,391	1,941	2,035	0	387	-100.0%
Kaua'i	4,177	572	11,342	17,351	16,607	14,137	1,695	2,602	-34.9%
Island of Hawai'i	6,377	672	18,799	25,840	24,247	23,057	4,239	3,261	30.0%

Airlift: Scheduled Seats and Flights

Scheduled Seats	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
OCEANIA	63,308	54,769	52,142	57,689	227,908	73,442	67,429	64,903	64,980	270,754	-13.8	-18.8	-19.7	-11.2	-15.8
Auckland	20,416	13,152	12,031	16,467	62,066	19,879	10,833	10,752	15,956	57,420	2.7	21.4	11.9	3.2	8.1
Melbourne	3,263	0	0	0	3,263	8,040	9,729	10,200	9,893	37,862	-59.4	-100.0	-100.0	-100.0	-91.4
Sydney	39,629	41,617	40,111	41,222	162,579	45,523	46,867	43,951	39,131	175,472	-12.9	-11.2	-8.7	5.3	-7.3

Scheduled Flights	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
OCEANIA	229	198	188	208	823	262	244	240	240	986	-12.6	-18.9	-21.7	-13.3	-16.5
Auckland	74	48	44	60	226	71	39	39	58	207	4.2	23.1	12.8	3.4	9.2
Melbourne	13	0	0	0	13	24	35	40	39	138	-45.8	-100.0	-100.0	-100.0	-90.6
Sydney	142	150	144	148	584	167	170	161	143	641	-15.0	-11.8	-10.6	3.5	-8.9

Source: DBEDT analysis from Diio Mi flight schedules as of February 23, 2026, subject to change.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	72	2,670	5,364	5,779	3,586	195	109	79.1%
True Independent (Net)	NA	5,956	138,997	168,918	146,000	127,658	21,997	25,112	-12.4%
Leisure vs Business									
Pleasure (Net)	46,357	4,978	170,983	214,545	184,938	159,249	24,693	30,216	-18.3%
MCI (Net)	717	128	5,394	6,015	4,112	3,993	727	413	76.0%
Convention/Conf.	575	34	2,118	2,758	3,150	2,873	658	343	91.8%
Corp. Meetings	33	61	2,312	2,161	278	312	68	29	135.2%
Incentive	108	38	1,117	1,171	741	826	55	42	31.9%

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.

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	57.1	36.7	42.8	44.8		46.0	38.9	7.1
Repeat Visitors (%)	NA	42.9	63.3	57.2	55.2		54.0	61.1	-7.1

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.

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

Tax Revenue

OCEANIA MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated (\$ Millions)	NA	2.32	59.95	73.22	62.17		10.34	12.05	-14.3%

³State government tax revenue generated (direct, indirect, and induced) for year-to-date 2025P and year-to-date 2024 were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.