



# Oceania Fact Sheet

## Oceania Overview

Hawai'i Tourism Oceania (HTO) continues to focus on accelerating bookings to the Hawaiian Islands through strategic actions and partnerships 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. 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 June 2026 Quick Facts<sup>1/</sup>

|                          |                                   |
|--------------------------|-----------------------------------|
| Visitor Expenditures:    | \$181.5 million                   |
| Primary Purpose of Stay: | Pleasure (62,669) vs. MCI (1,332) |
| Average Length of Stay:  | 8.45 days                         |
| First Time Visitors:     | 41.6%                             |
| Repeat Visitors:         | 58.4%                             |

| OCEANIA MMA (by Air)               | 2020    | 2021    | 2022      | 2023      | 2024      | 2025P     | 2026 Annual Forecast* | YTD June 2026P | YTD June 2025P | % Change |
|------------------------------------|---------|---------|-----------|-----------|-----------|-----------|-----------------------|----------------|----------------|----------|
| Visitor Expenditures (\$ Millions) | N/A     | 19.8    | 516.8     | 631.2     | 535.9     | 474.9     | 439.9                 | 181.5          | 220.6          | -17.7%   |
| Visitor Days                       | 479,534 | 84,413  | 1,815,212 | 2,135,047 | 1,784,211 | 1,560,706 | 1,402,166             | 590,776        | 752,753        | -21.5%   |
| Arrivals                           | 50,710  | 6,524   | 186,551   | 236,127   | 203,473   | 176,052   | 158,886               | 69,875         | 87,486         | -20.1%   |
| Average Daily Census               | 1,310   | 231     | 4,973     | 5,849     | 4,875     | 4,276     | 3,842                 | 3,264          | 4,159          | -21.5%   |
| Per Person Per Day Spending (\$)   | NA      | 235.1   | 284.7     | 295.6     | 300.4     | 304.3     | 313.7                 | 307.2          | 293.1          | 4.8%     |
| Per Person Per Trip Spending (\$)  | NA      | 3,041.5 | 2,770.4   | 2,673.2   | 2,633.8   | 2,697.5   | 2,768.4               | 2,597.5        | 2,521.5        | 3.0%     |
| Length of Stay (days)              | 9.46    | 12.94   | 9.73      | 9.04      | 8.77      | 8.87      | 8.83                  | 8.45           | 8.60           | -1.7%    |

N/A= 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 2, 2026).

## Contact Information

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<sup>1/</sup> 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.

## Market Summary

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- In the first half of 2026, there were 55,891 visitors from Australia, compared to 69,933 visitors in the first half of 2025. Visitors from Australia spent \$145.1 million in the first half of 2026, compared to \$176.7 million in the first half of 2025. Daily visitor spending in the first half of 2026 was \$310 per person, compared to \$298 per person in the first half of 2025.
- In the first half of 2026, there were 13,984 visitors from New Zealand, compared to 17,553 visitors in the first half of 2025. Visitors from New Zealand spent \$33.9 million in the first half of 2026, compared to \$43.9 million in the first half of 2025. Daily visitor spending in the first half of 2026 was \$276 per person, compared to \$274 per person in the first half of 2025.
- In the first half of 2026, there were 299 scheduled flights with 82,827 seats from Melbourne and Sydney compared to 400 flights (-25.3%) with 111,682 seats (-25.8%) in the first half of 2025.
- There were 121 scheduled flights with 33,419 seats from Auckland in the first half of 2026, compared to 125 flights (-3.2%) with 35,068 seats (-4.7%) in the first half 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)

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- Australia inflation eased to 4.0 percent in May 2026. The Australian dollar stabilized at approximately US\$0.69, providing a relatively supportive environment for outbound travel despite continued household cost pressures.
- New Zealand economic conditions remain more challenging, with higher fuel costs contributing to inflation, which is expected to reach 4.2 percent in the June quarter. The New Zealand dollar remained relatively weak at approximately US\$0.57.
- Australia outbound travel remained strong, with 1.09 million residents returning from short-term overseas trips in April 2026, up 4.6 percent year over year. Indonesia, New Zealand and Japan were the leading destinations.
- New Zealand outbound travel totaled 267,036 in April 2026, down 13,600 from April 2025. Travel to the United States declined by 1,990 trips, while China, Fiji and Vietnam recorded gains.
- Oceania arrivals to Hawai'i totaled 9,306 in May 2026, down 20 percent, reflecting the broader decline in travel to the United States. However, Oceania visitors remain high-value travelers, spending approximately \$313 per person per day, staying an average of nine days, with one in four visiting multiple islands.
- The Middle East is gradually returning as a key long-haul transit option for Australian and New Zealand travelers as travel confidence improves, strengthening the competitiveness of connections through Dubai, Doha and Abu Dhabi.
- Travelers remain highly value-conscious, increasingly comparing options and booking earlier to secure competitive pricing.

- Demand for premium and experiential travel remains resilient, with consumers willing to spend on luxury stays, cultural experiences and once-in-a-lifetime activities while seeking savings elsewhere.
- Japan, Southeast Asia and the South Pacific remain the strongest performing destinations, while long-haul and multi-destination travel are gaining interest as travelers seek immersive experiences and greater value from international trips.

## Distribution by Island

| OCEANIA MMA (by Air) | 2020   | 2021  | 2022    | 2023    | 2024    | 2025P   | YTD June 2026P | YTD June 2025P | % Change |
|----------------------|--------|-------|---------|---------|---------|---------|----------------|----------------|----------|
| O'ahu                | 49,419 | 4,847 | 182,278 | 232,500 | 199,263 | 169,253 | 66,374         | 85,923         | -22.8%   |
| Maui County          | 7,371  | 1,161 | 26,986  | 25,261  | 22,199  | 23,939  | N/A            | 9,143          | N/A      |
| Maui                 | 7,202  | 1,125 | 26,305  | 24,736  | 21,305  | 23,591  | 9,698          | 8,917          | 8.8%     |
| Moloka'i             | 703    | 21    | 1,391   | 1,863   | 1,924   | 1,576   | N/A            | 767            | N/A      |
| Lāna'i               | 718    | 36    | 1,895   | 2,391   | 1,941   | 2,035   | N/A            | 1,196          | N/A      |
| Kaua'i               | 4,177  | 572   | 11,342  | 17,351  | 16,607  | 14,137  | 4,793          | 5,917          | -19.0%   |
| Island of Hawai'i    | 6,377  | 672   | 18,799  | 25,840  | 24,247  | 23,057  | 8,988          | 9,076          | -1.0%    |

N/A= Due to limited data, Moloka'i and Lāna'i statistics are not available.

## 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 |
|-----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------------|--------------------|--------------------|--------------------|------------------------|
| <b>OCEANIA</b>  | <b>63,308</b>  | <b>54,769</b>  | <b>52,142</b>  | <b>57,689</b>  | <b>227,908</b> | <b>73,442</b>  | <b>67,429</b>  | <b>64,903</b>  | <b>64,980</b>  | <b>270,754</b> | <b>-13.8</b>       | <b>-18.8</b>       | <b>-19.7</b>       | <b>-11.2</b>       | <b>-15.8</b>           |
| 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 |
|-------------------|----------------|----------------|----------------|----------------|-------------|----------------|----------------|----------------|----------------|-------------|--------------------|--------------------|--------------------|--------------------|------------------------|
| <b>OCEANIA</b>    | <b>229</b>     | <b>198</b>     | <b>188</b>     | <b>208</b>     | <b>823</b>  | <b>262</b>     | <b>244</b>     | <b>240</b>     | <b>240</b>     | <b>986</b>  | <b>-12.6</b>       | <b>-18.9</b>       | <b>-21.7</b>       | <b>-13.3</b>       | <b>-16.5</b>           |
| 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 June 2026P | YTD June 2025P | % Change |
|---------------------------------|--------|-------|---------|---------|---------|---------|----------------|----------------|----------|
| Group vs True Independent (Net) |        |       |         |         |         |         |                |                |          |
| Group Tour                      | N/A    | 72    | 2,670   | 5,364   | 5,779   | 3,586   | 2,055          | 1,697          | 21.1%    |
| True Independent (Net)          | N/A    | 5,956 | 138,997 | 168,918 | 146,000 | 127,658 | 51,132         | 62,846         | -18.6%   |
| Leisure vs Business             |        |       |         |         |         |         |                |                |          |
| Pleasure (Net)                  | 46,357 | 4,978 | 170,983 | 214,545 | 184,938 | 159,249 | 62,669         | 79,839         | -21.5%   |
| MCI (Net)                       | 717    | 128   | 5,394   | 6,015   | 4,112   | 3,993   | 1,332          | 1,721          | -22.6%   |
| Convention/Conf.                | 575    | 34    | 2,118   | 2,758   | 3,150   | 2,873   | 1,001          | 1,101          | -9.1%    |
| Corp. Meetings                  | 33     | 61    | 2,312   | 2,161   | 278     | 312     | 124            | 171            | -27.8%   |
| Incentive                       | 108    | 38    | 1,117   | 1,171   | 741     | 826     | 262            | 454            | -42.3%   |

N/A = 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 June 2026P | YTD June 2025P | % Change |
|-------------------------|------|------|------|------|------|-------|----------------|----------------|----------|
| First Time Visitors (%) | N/A  | 57.1 | 36.7 | 42.8 | 44.8 | 44.9  | 41.6           | 45.1           | -3.5     |
| Repeat Visitors (%)     | N/A  | 42.9 | 63.3 | 57.2 | 55.2 | 55.1  | 58.4           | 54.9           | 3.5      |

N/A = 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 June 2026P | YTD June 2025P | % Change |
|-------------------------------------------|------|------|-------|-------|-------|-------|----------------|----------------|----------|
| State tax revenue generated (\$ Millions) | N/A  | 2.32 | 59.95 | 73.22 | 74.95 | 66.42 | 25.38          | 30.85          | -17.7%   |

<sup>3</sup>State 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.