



Oceania Fact Sheet

Oceania Overview

The HTA, through Hawai'i Tourism Oceania (HTO), targets visitors from the countries of Australia and New Zealand, which have experienced steady growth in outbound travel to Hawai'i over recent years. Since 2004, the HTA has contracted with The Walshe Group Pty Ltd to provide marketing services in Oceania.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures:	\$883.4 million
Primary Purpose of Stay:	Pleasure (338,506) vs. MCI (4,445)
Average Length of Stay:	9.41 days
First Time Visitors:	47.0%
Repeat Visitors:	53.0%

OCEANIA MMA (by Air)	2018	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Visitor Expenditures* (\$ Millions)	1,045.2	1,041.3	0.4%	984.1	-5.8%	883.4	1045.2	-15.5%
Visitor Days	4,014,147	3,870,803	3.7%	3,705,522	-7.7%	3,410,118	4,014,147	-15.0%
Arrivals	415,764	400,957	3.7%	389,577	-6.3%	362,360	415,764	-12.8%
Per Person Per Day Spending* (\$)	260.4	269.0	-3.2%	265.6	2.0%	259.0	260.4	-0.5%
Per Person Per Trip Spending* (\$)	2,514.0	2,596.9	-3.2%	2,526.2	0.5%	2,437.9	2,514.0	-3.0%
Length of Stay (days)	9.65	9.65	0.0%	9.51	-1.5%	9.41	9.65	-2.5%

*Excludes supplemental business spending

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¹ 2019 visitor data are preliminary. January – June 2019 data were updated with immigration statistics from the National Travel and Tourism Office (NTTO). 2018 and 2017R visitor data are the final numbers and reflect updated immigration statistics from NTTO; updated airfare statistics from DIO Mi Airline database, and final passenger counts for Airline reports.

Market Summary

- 2018 was a record year for both visitor arrivals (+3.7% to 415,764) and visitor days (+3.7%) compared to 2017. Daily spending (-3.2% to \$260 per person) was lower compared to 2017; however, overall visitor spending increased slightly by 0.4 percent to \$1.05 billion. In 2019, visitor arrivals (-12.8% to 362,360) and visitor days (-15.0% to 3,410,118) decreased. Slightly lower daily spending (-0.5% to \$259 per person) also contributed to a decline in visitor spending (-15.5% to \$883.4 million).
- In 2018, air capacity from Oceania increased by 10.3 percent from 2017 to 533,000 seats. In 2019, scheduled air capacity decreased 10.9 percent compared to 2018, with fewer seats from Auckland New Zealand (-17.7%) and fewer combined seats from Brisbane, Melbourne, and Sydney, Australia (-3.0%).

Market Conditions

- The outlook for the Australian economy remains unchanged. GDP growth over the first half of 2019 was stronger than it was over the second half of last year and figures suggest that growth will continue at a moderate pace. The September quarter figures were released, showing the economy grew by just 0.4 percent, below expectations and slower than the previous two quarters. Mid-year tax cuts aimed at stimulating the economy have not had the desired impact with consumer spending remaining flat. During December, the Australian dollar remained consistent, trading at US\$0.68.
- There has been an increase in the number of flights available from Australia to U.S. destinations, resulting in very competitive fares and providing travelers with more choice on where to holiday in the USA.
- The New Zealand economy has shown growth through 2019 (albeit slow) with the government also posting a surplus. The New Zealand dollar has experienced fluctuations through the year, and for the majority keeping above US\$0.65.
- Outbound travel from New Zealand continues to grow, exceeding 3 million trips in a calendar year.

Distribution by Island

OCEANIA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	406,904	391,031	4.1%	355,112	406,904	-12.7%
Maui County	70,440	76,175	-7.5%	61,235	70,440	-13.1%
Maui	69,544	74,940	-7.2%	60,116	69,544	-13.6%
Moloka'i	4,017	5,306	-24.3%	4,669	4,017	16.2%
Lāna'i	5,081	6,306	-19.4%	6,104	5,081	20.1%
Kaua'i	33,028	35,746	-7.6%	31,999	33,028	-3.1%
Island of Hawai'i	51,570	65,912	-21.8%	47,129	51,570	-8.6%

Airlift

Departure City	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
OCEANIA	115,945	125,146	135,677	117,814	494,582	119,701	138,233	142,998	132,113	533,045	-3.1	-9.5	-5.1	-10.8	-7.2
Auckland	29,744	30,284	36,032	29,240	125,300	29,192	41,707	45,158	36,202	152,259	1.9	-27.4	-20.2	-19.2	-17.7
Brisbane	11,120	10,842	11,676	11,398	45,036	11,398	10,842	10,842	11,676	44,758	-2.4	0.0	7.7	-2.4	0.6
Melbourne	11,390	13,400	15,410	12,395	52,595	14,405	15,745	14,740	14,070	58,960	-20.9	-14.9	4.5	-11.9	-10.8
Sydney	63,691	70,620	72,559	64,781	271,651	64,706	69,939	72,258	70,165	277,068	-1.6	1.0	0.4	-7.7	-2.0

Source: Diio Mii airline schedules, updated January 10, 2020.

Group vs. True Independent; Leisure vs. Business

OCEANIA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	8,035	8,026	0.1%	6,987	8,035	-13.0%
True Independent (Net)	241,470	228,646	5.6%	213,709	241,470	-11.5%
Leisure vs business						
Pleasure (Net)	391,778	378,179	3.6%	338,506	391,778	-13.6%
MCI (Net)	6,793	7,914	-14.2%	4,445	6,793	-34.6%
Convention/Conf.	4,960	6,243	-20.6%	3,169	4,960	-36.1%
Corp. Meetings	383	609	-37.1%	428	383	11.7%
Incentive	1,613	1,410	14.4%	870	1,613	-46.1%

First Timers vs. Repeat Visitors

OCEANIA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	49.2	51.4	-2.2	47.0	49.2	-2.2
Repeaters (%)	50.8	48.6	2.2	53.0	50.8	2.2

Tax Revenue

OCEANIA MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	122.01	121.54	0.4%	103.11	122.01	-15.5%

*State government tax revenue generated (direct, indirect, and induced)