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HVCB Tourism Industry Update

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"HVCB Tourism Industry Update" is a weekly briefing of travel news and developments affecting Hawai'i's visitor industry, compiled by the HVCB Market Trends Department.

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Feature

- **Over 96 Percent of Visitors Satisfied with their Hawai'i Vacation**
 - Results from the state Department of Business, Economic Development and Tourism's (DBEDT) [2002 Visitor Satisfaction and Activity Report](#) show that 96 percent of U.S., Japanese, Canadian and European visitors rated their vacation in Hawai'i as "excellent" or "above average."
 - U.S. respondents were especially satisfied with their vacation experience in Hawai'i, with 98.1 percent giving an "excellent" or "above average" overall rating. Nearly 90 percent of U.S. travelers said that they are "very likely" to recommend Hawai'i as a vacation destination to friends and relatives, while over 69 percent stated they were "very likely" to revisit the Islands within the next five years.
 - Meanwhile, 96.3 percent of Japanese travelers to Hawai'i rated their most recent vacation to Hawai'i "excellent" or "above average," and nearly 70 percent said they were "very likely" to recommend the Islands as a vacation destination to their friends and relatives. An additional 52.3 percent stated that they were "very likely" to return to Hawai'i within the next five years.
 - Nearly 98 percent of Canadian travelers to Hawai'i said they were satisfied with their vacation experience in Hawai'i. Eighty-three percent (82.8%) were "very likely" to

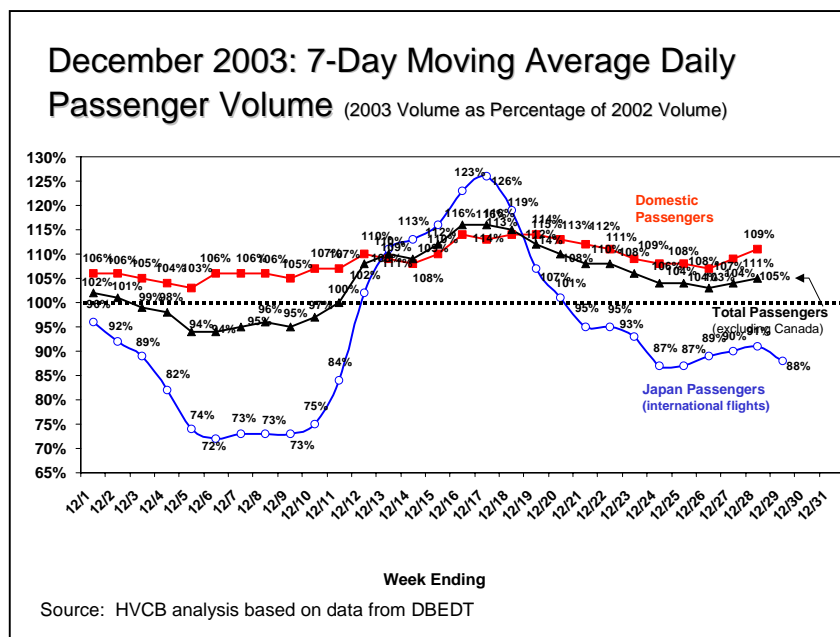
recommend a Hawaiian vacation to their friends or relatives, and more than half (53.1%) said they were "very likely" to return for vacation in the next five years.

- Europeans also gave their Hawaiian vacation high marks -- 97.5 percent rated Hawai'i "excellent" or "above average." An additional 78.1 percent said they were "very likely" to recommend Hawai'i as a vacation place, and 44.3 percent said they were "very likely" to return to Hawai'i for vacation in the next five years.

Hawai'i

CONSUMER TRAVEL BEHAVIORS

- **Domestic Passenger Volume to Hawai'i Nine Percent Above 2003 Levels** - For the seven-day period ending December 29, domestic passenger volume was up nine percent over the same period in 2002, according to the state [Department of Business, Economic Development and Tourism](#). Total domestic and international (excluding Canada) passenger volume rose five percent above 2002 levels for the seven-day period, while nonstop passengers from Japan arriving in Hawai'i declined to 88 percent of 2002 figures.



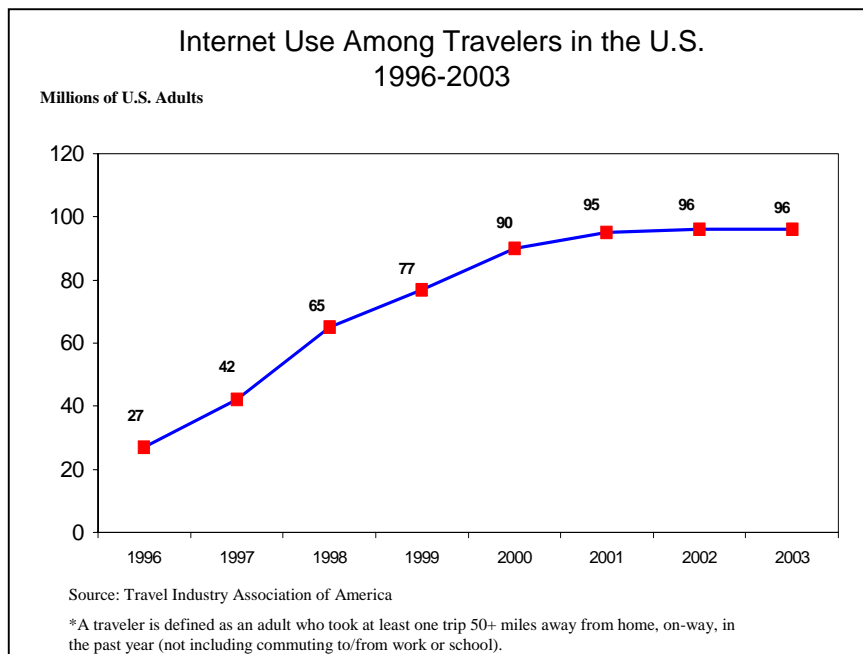
- **Domestic Visitor Days Reach November Record** - Domestic visitor days in Hawai'i reached a record 3,530,273 days in November 2003, making it the best November in the state's history, according to [DBEDT](#). The 1.7 percent increase in domestic visitor days compared to November 2002 can be largely attributed to the 5.6 percent increase in U.S. West visitors, the state's largest market. Meanwhile, arrivals from Japan continued to recover (after bottoming out in May) with a year-over-year increase of 1.9 percent in November.
- **Hawai'i Ranks Fourth In Nation For International Traveler Spending** - According to the Travel Industry Association's [Tourism Works for America 2003 Report](#), Hawai'i ranks fourth in the nation for international traveler spending. With \$5.88 billion in international spending, Hawai'i ranks behind only Florida (\$15.64 billion), California (\$11.96 billion) and New York (\$8.38 billion). These figures are based on 2001 data, the most current year that has comparable information for all 50 states.
- **JATA Diffusion Index: Short-Term Japanese Outbound Travel to Hawai'i Set to Improve** - In the Japan Association of Travel Agents' (JATA) latest short-term "diffusion index" study conducted in November, Japanese travel retail outlets are projecting an improvement in outbound travel to Hawai'i in the first quarter of 2004, according to [Travel Journal International](#). On a scale of +100 (very good) to -100 (poor), Japanese propensity to travel to Hawai'i stands at -22, second only to Europe (-16). This is compared to readings of -28 (4th Quarter 2003); -63 (3rd Quarter 2003); -90 (2nd Quarter 2003); and -57 (1st Quarter 2003).

- **Japanese Rank Hawaiian Chocolates as Top Travel Souvenir in 2003** - JTB Traveland, which reports the popularity of products offered through its souvenir delivery program (*Omiyage Omakase*), ranks *Hawaiian Host's* chocolate-covered macadamia nuts as the top-selling "omiyage" (souvenir) of 2003 according to *Travel Journal International*. The chocolates, which also claimed the top spot in 2002, outpaced the sales of *Baci* chocolates (Italy), *Tengu* beef jerky (U.S.), and *Koala* chocolates (Australia). The *Omiyage Omakase* program allows travelers to order their souvenirs and have them delivered home without having to carry them through customs back to Japan. Sales figures were collected during the travel period between April and September 2003.

National and International

▪ **CONSUMER TRAVEL BEHAVIORS**

- **National Consumer Confidence Index Declines 1.2 Points in December** - After gaining 10 points in November, the Conference Board's [Consumer Confidence Index](#) declined slightly, down 1.2 points in December to 91.3 (1985=100). The "Present Situation" index decreased to 73.9 (from 81.0 in November). However, the "Expectations" index rose to 102.9 (from 100.1 in November), indicating a positive consumer outlook for 2004. The Conference Board points out that while consumers expect healthy economic growth in 2004, they continue to worry about current labor market conditions.
- **TIA: 95.8 Million U.S. Adults are "Online Travelers"** - The Travel Industry Association of America (TIA) estimates that 84 percent of the 114 million adults online are travelers, translating to a national "online traveler" market of 95.8 million. Although the percentage of Internet use among the traveling public seems to have leveled off over the past few years, the online traveler market has grown by more than 255 percent since 1996.



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We welcome any suggestions or comments that you may have that will help us improve the quality of the weekly "HVCB Tourism Industry Update" for our readers. Please feel free to share your ideas with Gail Chew via email at: gchew@hvcb.org