

"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.

**FOR IMMEDIATE RELEASE**

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### 1. FEATURE

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#### ⇒ TIA/AAA Forecasts Record Fourth of July Travel

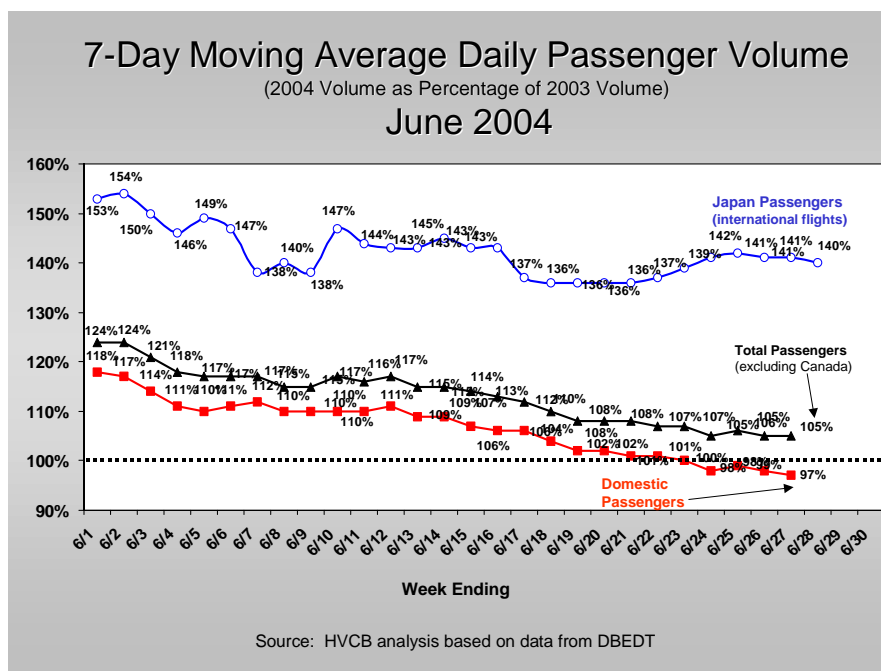
According to a national survey of 1,300 American adults conducted by the Travel Industry Association of America (TIA) and [AAA](#), a record 39.4 million people are projected to travel 50 miles or more from home over the July 4<sup>th</sup> weekend. The total travel estimate for the holiday weekend is 3.4 percent above last year's levels, with air travel projected to be up 4.5 percent (to 4.6 million); and auto travel forecasted to increase 3.0 percent (to 34.4 million). The greatest number of air travelers this holiday weekend is expected to come from the West, with approximately 1.7 million air travelers, followed by the Midwest with 900,000; Southeast, 800,000; and the Northeast and Great Lakes, with 600,000 each. Preferred holiday weekend experiences include:

- Oceans and Beaches (24%)
- Cities (22%)
- Towns/Rural Areas (22%)
- Lakes (12%)
- Mountains (8%)
- Theme/Amusement Parks (3%)
- State/National Parks (2%)

## CONSUMER TRAVEL BEHAVIORS

### Domestic Passenger Volume to Hawai'i Down Three Percent for Seven-Day Period

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic passenger volume was at 97 percent of prior-year levels for the seven-day period ending June 27, 2004. Total domestic and international (excluding Canada) passengers on nonstop flights was up five percent over last year's average, while total volume of nonstop passengers from Japan continued to perform above 2003 levels, up 40 percent over 2003 levels for the seven-day period.



## CURRENT INDUSTRY DEVELOPMENTS

### HVCB Releases Details on "Come Experience Hawai'i" Fall Campaign

Hawai'i's new statewide [fall promotion campaign](#) with the tagline "there's plenty of time to do absolutely nothing...on your plane ride home," underlines the multitude of activities to be enjoyed in Hawai'i's six major islands during the season. "Come Experience Hawai'i" highlights the state's many outdoor activities and adventures, including golf, hiking, and snorkeling during the typical post-summer season slowdown in travel. The campaign also emphasizes educational enrichment (e.g., museums, historical sites, cultural heritage tours); and other "indulging" activities like Hawai'i's diverse shopping, world-renowned dining, and state-of-the-art spas. Furthermore, the campaign will feature Hawai'i's "Aloha Festivals," which take place between September 9 - October 16, featuring Hawaiian music and dance, floral parades, block parties, cultural exhibits and performances on all Islands.

### Hawai'i is Ranked Among Top Summer Destinations by Travel Agents and Consumers

Hawai'i and Honolulu combined, ranked as the fourth most popular domestic destination this summer by travel agents, according to the "[Summer Hot Spots Survey](#)" conducted by the [American Society of Travel Agents](#) (ASTA) and Fodor's LLC:

- Orlando (22.5%)
- Las Vegas (19.6%)
- New York (9.1%)
- **Hawai'i/Honolulu (8.5%)**
- San Francisco (5.0%)

At the state level, 11.1 percent of travel agents ranked Hawai'i as a summer hot spot, behind only Florida (29.2%); Nevada (19.8%); and California (11.5%). ASTA website users had an even better perception of Hawai'i, ranking it the second most desirable domestic "hotspot" of the summer.

### 3. NATIONAL / INTERNATIONAL

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#### ■ CONSUMER TRAVEL BEHAVIORS

##### ➤ International Arrivals to the U.S. Improve In April

The U.S. welcomed 3.4 million international visitors in April 2004, an increase of 28 percent over April 2003, and the seventh consecutive month of positive arrivals growth, according to the [Office of Travel and Tourism Industries](#) (OTTI). Year to date, international arrivals in 2004 are 16 percent above prior year levels.

- Through April 2004, Canadian arrivals to the U.S. totaled 4.3 million, up nearly 14 percent from 2003 levels.
- Japanese arrivals totaled 1.2 million through April 2004, an increase of 26 percent over prior year figures.

##### ➤ AAA Survey: Most Travelers Confident in Travel Security

Ninety-one percent of Americans are confident in security across all travel modes (e.g., air, auto, train etc.) and for all destination types (e.g., resorts, cities, museums, parks etc.), according to a national survey conducted by [AAA](#). The percentage is lower for air travel security, with 80 percent of respondents saying they were confident in airport and in-flight security. The survey also asked whether "difficulties and delays caused by airport security procedures" or "concerns about another terrorist incident" would have an impact on their decision to fly – consumers noticeably perceived the "hassle" of flying (36%) over the "hazard" of flying (24%) as a major concern.

##### ➤ Consumer Reports: Forty Percent of Travelers Check Online Before Booking Accommodations

Four out of ten travel consumers visit the Internet before booking a room, and are more likely to pick a hotel by price over brand name, according to [Consumer Reports](#). The consumer magazine's research also found that hotels are about 75 percent more likely to offer better room rates than travel websites. The average rate difference was \$83 per night when hotels were cheaper, versus an average rate difference of \$61 per night when travel websites offered better rates. The report also showed that most of the magazine's readers were satisfied with the hotels they chose – nearly seven of 10 readers were very or completely satisfied with their hotel experience.

##### ➤ Worldwide Cruise Passenger Counts Increase in First Quarter

The [Cruise Lines International Association](#) (CLIA) revealed that more than 2.4 million people worldwide cruised on their member line ships in the first quarter of 2004, up 9.1 percent over the same period in 2003. North American passengers increased 6.8 percent over 2003 figures, registering nearly 2.1 million guests during the quarter. CLIA's report also found that the worldwide cruise line occupancy factor grew two percentage points to 103.3 percent during the first three months of 2004.

*We welcome any suggestions or comments that you may have that will help us improve the quality of the weekly Tourism Industry Update. Please feel free to share your ideas:*

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