

"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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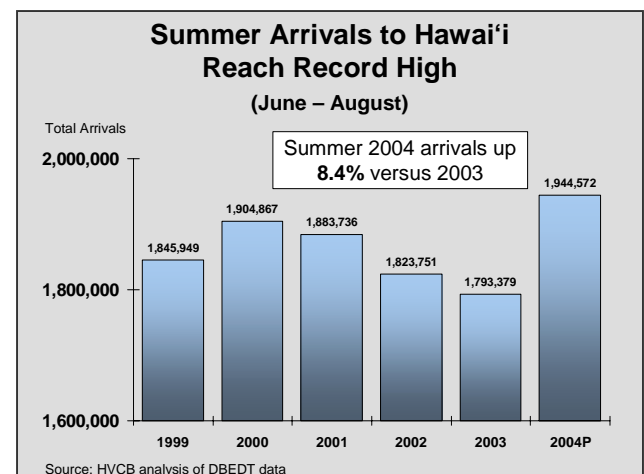
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### 1. FEATURE

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#### ⇒ Summer Arrivals to Hawai'i Hit All-Time High

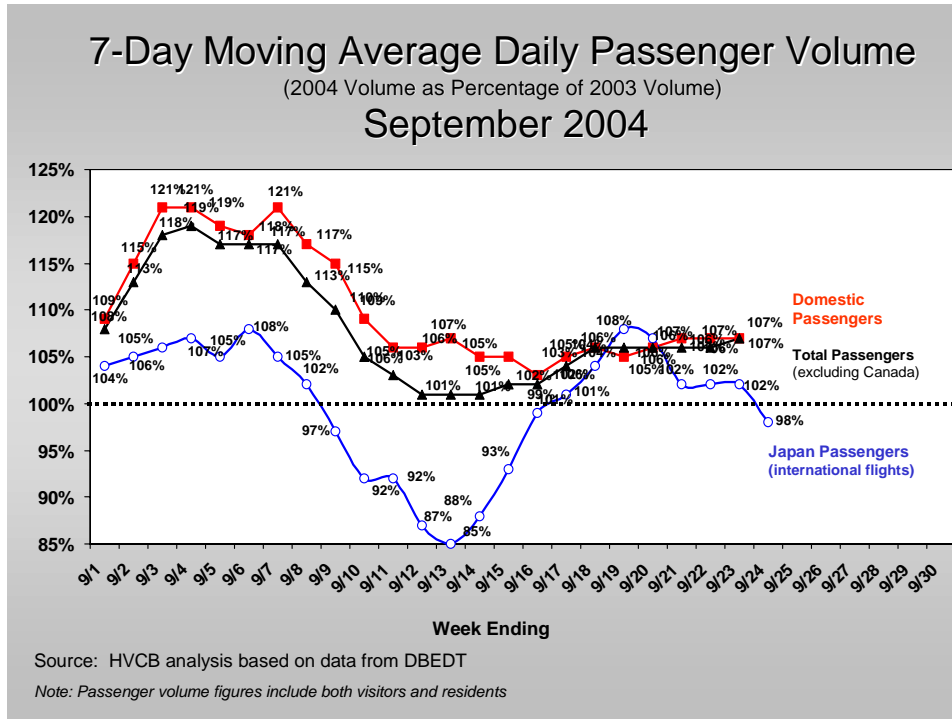
Arrivals to Hawai'i between June and August reached a record-high this year - surpassing pre-9/11 levels - with total domestic and international arrivals totaling 1.9 million. Total arrivals during the summer months were up 8.4 percent over 2003 summer arrivals, and up 1.9 percent over the previous record-high, reached in 1990. The arrivals were driven mainly by the domestic market, which also reached an all-time high with 1.4 million during the summer months, up 4.7 percent over the previous record high set last year. International summer arrivals totaled 528,950 this year, up 19.9 percent over 2003 figures, but still well below the record 789,360 international arrivals registered in 1996.



■ CONSUMER TRAVEL BEHAVIORS

➤ Domestic Passenger Volume to Hawaii Up Seven Percent for Latest Seven-Day Period

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), domestic passenger volume on nonstop flights to Hawaii increased seven percent over 2003 levels for the latest seven-day period ending September 23, 2004. Nonstop passenger volume from Japan declined to 98 percent of 2003 levels, while total domestic and international (excluding Canada) volume on nonstop flights arriving in Hawaii was 107 percent of prior-year levels for the seven-day period. For the most recent Seven Day Moving Average chart, visit HVCB's Market Trends Online: <http://www.hvcb.org/trends>



■ CURRENT INDUSTRY DEVELOPMENTS

➤ HVCB Earns Third Straight "Award of Excellence" From *Corporate & Incentive* Travel Magazine

For the third consecutive year, HVCB earned an "Award of Excellence" from *Corporate and Incentive Travel* magazine. The "Award of Excellence" is a result of magazine subscribers voting for providers and/or facilities that best served their clients' travel program needs during the past year. Those logging votes included incentive, corporate and independent meeting planners, industry service suppliers, and third-party providers. HVCB was honored for its outstanding service to clients booking single-property meetings at resort and/or hotel properties. Services included on-site support for meetings in Hawaii; coordinating transportation and pre- and post-tours with attractions and vendors; assisting with accommodations and site inspections; and providing supplier, facility and venue information.

Year-to-date (through August 2004), HVCB has generated:

- 710 qualified hotel leads - nine percent above prior-year levels year-to-date.
- 502,056 lead room nights - 10 percent above prior-year levels year-to-date.

*The HVCB-generated leads have covered a wide business spectrum, including technology, pharmaceutical, finance, insurance, manufacturing and construction.*

## ➤ US-VISIT Program to Begin at National Ports of Entry; HNL Plans to Ease Impact

Beginning September 30, 2004, travelers under the Visa Waiver Program will be processed under the U.S. Visitor and Immigrant Status Indicator Technology (US-VISIT) entry-exit system at all national ports of entry, including Honolulu International Airport (HNL). The US-VISIT program will require all international passengers to the U.S. to have their two index fingers scanned and a digital photograph taken to verify identity at the air or sea port of entry. An estimated 5,500 international passengers arrive at HNL each day, with most international flights arriving between 7 a.m. and 11 a.m. HNL and the Department of Transportation (Airports Division and Customs and Border Protection) have developed an [action plan](#) with the objective to improve the overall airport experience, and increase international visitor satisfaction levels. The performance goals include:



- No passenger shall experience standing in line for more than 30 minutes
- Providing arriving passengers a comfortable, hospitable, organized environment
- No passenger will be required to ride a Wiki Wiki bus more than once

Further details of this program are available on the Hawai'i Tourism Authority website:  
<http://www.hawaii.gov/tourism>

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#### ■ CONSUMER TRAVEL BEHAVIORS

##### ➤ IATA: International Air Passenger Traffic Up 18.7 Percent Through August

International air passenger traffic for the first eight months of the year is up 18.7 percent compared to the same period in 2003, according to preliminary [International Air Transport Association](#) (IATA) traffic figures for January-August 2004. Improvement was seen in each of the world regions, including the Asia-Pacific (+27.3%), and North America (+17.4%) through August 2004, compared to 2003. When compared to pre-9/11 figures, total international air passenger traffic for the eight-month period is up 8.4 percent this year over January-August 2000.

#### ■ CURRENT INDUSTRY DEVELOPMENTS

##### ➤ TIA: Travel Price Index Increases 3.6 Percent in August

The Travel Industry Association of America's (TIA) [Travel Price Index](#) (TPI) increased 3.6 percent in August 2004, compared to the same month last year. The TPI also outpaced the nation's overall Consumer Price Index (+2.7%), for the same period. Airfares decreased 5.5 percent compared to last year, while lodging prices rose 4.0 percent. The TPI is a monthly indicator of the price change in travel goods and services available to the U.S. consumer.

*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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