

"HVCB Tourism Industry Update" is a bi-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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- **Americans Increasingly Interested in Visiting Hawai'i This Year; Planning Summer 2006 Travel Earlier Than Usual**

Hawai'i a Hot Destination for American Travelers

As Americans are preparing for their summer vacations, a survey conducted by [Yesawich, Pepperdine, Brown and Russell](#) (YPB&R) reveals that "Hawaiian Neighbor Islands" and "Honolulu, Hawai'i" are hot vacation spots, ranking one and three, respectively, among the top domestic destinations American travelers are most interested in visiting this year. Results from the *2006 National Leisure Travel Monitor* also show that these Hawai'i destinations have had a statistically significant increase in visitation interest, with both the Neighbor Islands (75% stating they are extremely or very interested in visiting) and Honolulu (71%), up 12 percentage points from 2005 figures – the highest increase of any other top 10 destination. At the state level, Hawai'i held its position as the third most preferred destination, ranking behind California and Florida.

Top Domestic Destinations
American Travelers Extremely/Very Interested in Visiting

Destination	2006 (%)	2005 (%)	% Change
1. Hawaiian Neighbor Islands	75%	63%	+12%*
2. National Parks	73%	66%	+7%*
3. Honolulu/O'ahu	71%	59%	+12%*
4. Florida Keys	56%	53%	+3%
5. Colorado Mountain Resorts	51%	46%	+5%*
6. Lake Tahoe	50%	46%	+4%*
7. San Francisco	49%	45%	+4%
8. San Diego	48%	41%	+7%*
9. Orlando	47%	44%	+3%
10. Las Vegas	47%	43%	+4%*

* Denotes statistically significant change over previous year
Source: YPB&R 2006 National Leisure Travel Monitor

Summer Vacation Planning Starts Earlier in 2006

The majority (81%) of Americans planning a trip this summer started arranging their plans as early as this January, according to the *Voice of the Traveler Survey* conducted by Travel Industry Association (TIA) and Synovate in January 2006. Of the American travelers planning a summer trip this year:

- Thirty percent (30%) have started planning their longest trip earlier this year than they did last year, while 43% are starting at the same time as they did for their summer 2005 vacation. Only nine percent stated that they are planning their trip later than the prior year.
- Twenty-one percent (21%) have already arranged lodging at their destination of choice, while 28 percent are still exploring their lodging options.
- Thirty-two percent (32%) are still choosing a destination for their longest summer trip.
- Women (85%) were more likely than men (77%) to have thought about the details of their longest summer trip.
- Thirty-eight percent (38%) have already decided or booked their mode of transportation, while half are still exploring their options.

TIA suggests that Americans may be planning their trips early as air and hotel demand strengthens resulting in higher prices and fewer bargains. They also conclude that travel marketers may want to consider launching their summer travel campaigns earlier this year than in the past.

Survey results were based on a national representative sample of over 1,500 U.S. adults, conducted online in January 2006.

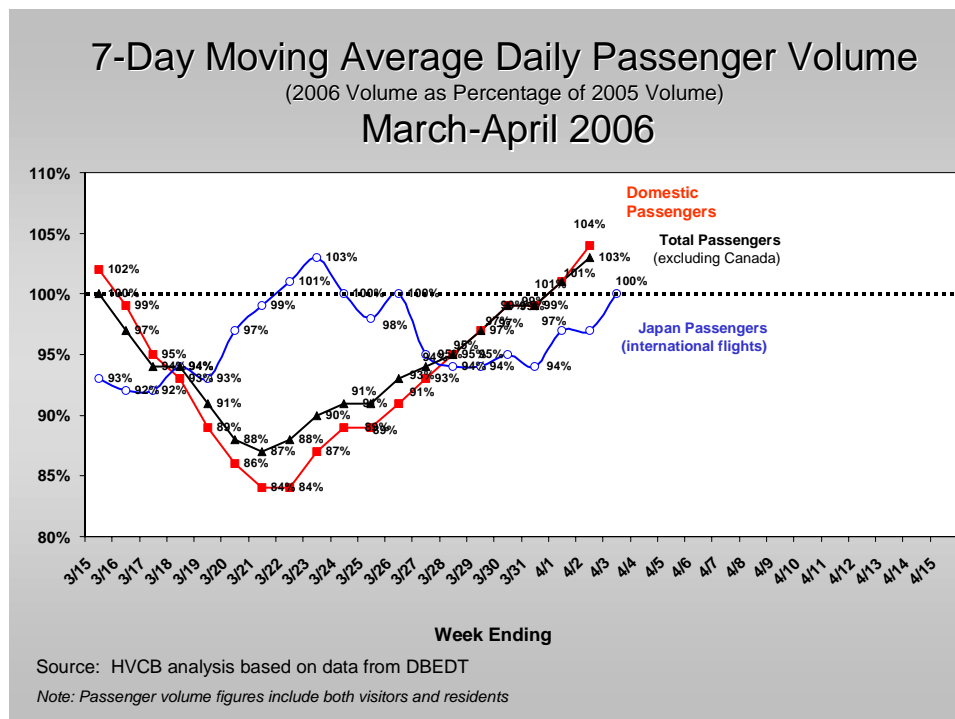
2. HAWAII

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■ CONSUMER TRAVEL BEHAVIORS

➔ Total Passenger Volume at 103 Percent of Prior-Year Levels

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic and international (excluding Canada) passenger volume was three percentage points above prior-year levels for the seven-day period ending April 2, 2006. Domestic passenger volume on nonstop flights to Hawai'i increased four points compared to prior-year levels for the week. The notable drop in domestic passengers in the middle of March was due mainly to the shift in the Easter holiday/Spring Break period (Easter fell on March 27th in 2005, and falls on April 16th this year). Nonstop passenger volume from Japan was on par with 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>*



■ CONSUMER TRAVEL BEHAVIORS

➤ European Women Projected to Spend More Time Online Than Their Male Counterparts

New data from the European Interactive Advertising Association (EIAA) shows that in the past three years, the number of hours spent online by female internet-users have grown 63 percent, while their male counterparts have grown 54 percent (reported by *eMarketer*). If this trend continues, females will surpass men in time spent online in Europe as early as 2007. The Internet is the fastest growing media among women in Europe as they spend more than nine hours per week online. The fastest growing websites visited by women in Europe are travel sites (57%), followed by shopping (46%), banking/finance (43%), and auctions (33%). The EIAA study was conducted in Fall 2005 of 7,000 random telephone interviews across Belgium, France, Germany, Italy, the Netherlands, the Nordic countries, the U.K., and Spain.

■ CURRENT INDUSTRY DEVELOPMENTS

➤ U.S. Consumer Confidence Rebounds in March

After declining in February, the Conference Board's [National Consumer Confidence Index](#) rebounded in March, increasing 4.5 points (over prior-month levels) to reach 107.2 (1985=100). With this boost in March, the Index nearly reached a four-year high (May 2002, 110.3). The "Present Situation" index rose to 133.3 (from 130.3 in February), and the "Expectations" index improved to 89.9 during the month (from 84.2). The continued improvement in the "Present Situation" index suggests that the strong economic start to the year may start dampening in the latter half of the year, as consumer expectations continue to register subdued levels.

WEATHER-RELATED UPDATES For Hawai'i

Information on the effects of the extended rainfall in Hawai'i is provided in the following websites:

For an overview of the situation, the Hawai'i Tourism Authority's updated *Hawai'i Travel Tips* website:

<http://www.travelsmarthawaii.com>

For updated beach closures, the Hawai'i Department of Health:

<http://www.state.hi.us/doh>

For updated weather conditions and forecasts for each island, the National Weather Service:

<http://www.prh.noaa.gov/pr/hnl/>

If you have any further questions, feel free to call 1-800 GOHAWAII (24 hours a day)

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

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