

"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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#### ➤ Gallup: Hawai'i Is the Top Dream Destination for Americans

When asked about where they would go on their dream vacation, Americans chose Hawai'i over all other destinations worldwide, according to a recent [Gallup](#) poll (conducted May 22-24, 2006). Seventeen percent (17%) of the nationally representative sample said they would travel to Hawai'i if money were no object, ranking the Islands of Aloha above Europe (11%) and Australia (6%). After Hawai'i, the next most desired domestic destination was Alaska/Alaskan Cruise with four percent of the respondents.

- When compiling all of the open-ended questions, 58 percent of Americans would chose an international destination, while only 38 percent chose a destination within the U.S.
- Women (61%) were more likely than men (54%) to chose an international dream destination.
- Younger Americans are more likely than older Americans to select an international dream vacation.

- Seventy-two percent (72%) of 18-34-year-olds chose an international destination, while 57 percent of 35-54-year-olds, and 46 percent of those 55 and older said the same.

Top Dream Destinations	
<i>If Money Were No Object, Where Would You Vacation?</i>	
Destination	2006 (%)
1. Hawai'i	17%
2. Europe	11%
3. Australia	6%
4. Italy	5%
5. Alaska/Alaskan Cruise	4%

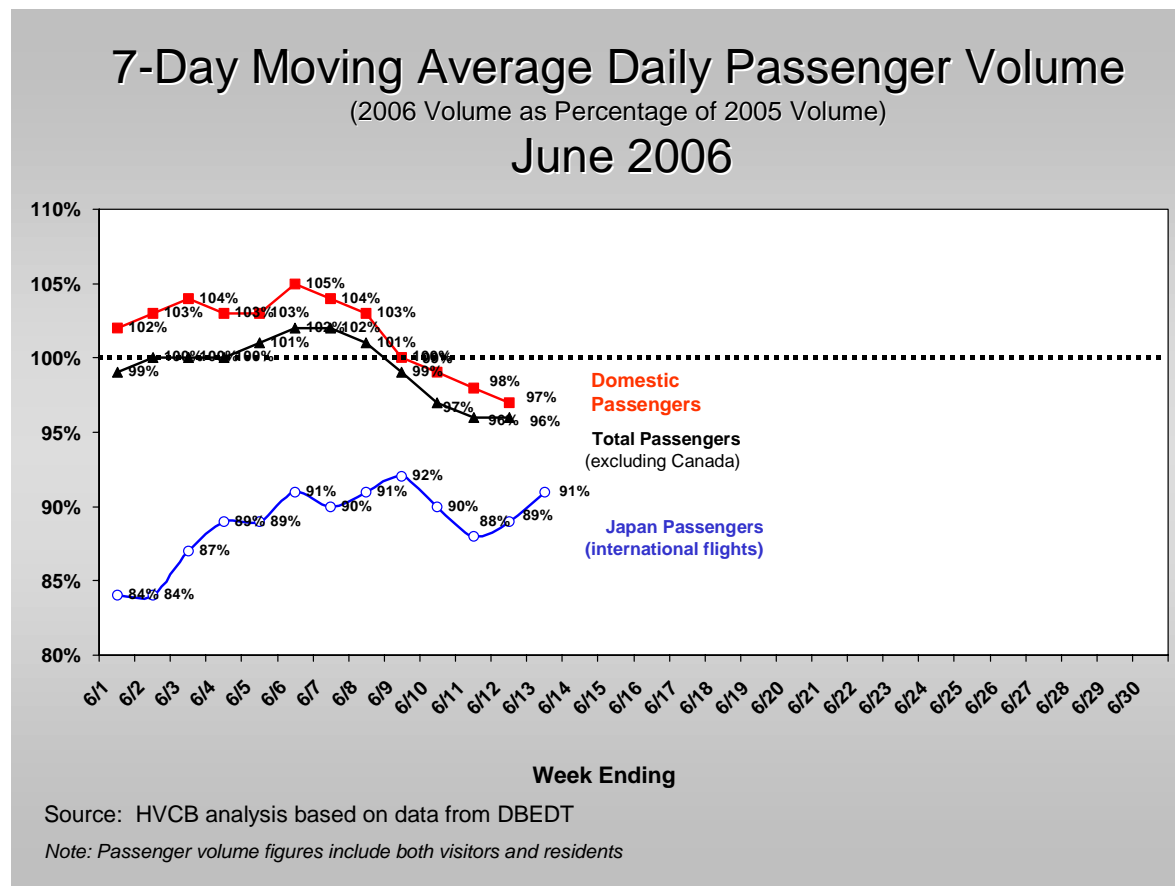
Source: Gallup

■ CONSUMER TRAVEL BEHAVIORS

➤ Domestic Passenger Volume Three Points Below Prior-Year Levels for the Week

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), domestic passenger volume on nonstop flights to Hawai'i decreased three percentage points behind prior-year levels for the seven-day period ending June 12, 2006. Nonstop passenger volume from Japan dipped nine percentage points below prior-year levels, while total domestic and international (excluding Canada) passenger volume was four points below prior-year levels for the week.

For the most recent Seven Day Moving Average chart, visit HVCB's Market Trends Online: <http://www.hvcb.org/trends>



➤ Hawai'i Ranks Fourth in In-Bound Overseas Travel to the U.S.

Hawai'i maintained its position as the fourth most visited state destination for all overseas travelers to the U.S., according to preliminary figures released by the [Office of Travel and Tourism Industries](#) (OTTI) of the U.S. Department of Commerce. In rank order, Hawai'i placed just behind New York, California, and Florida.

- O'ahu/Honolulu ranked as the sixth most popular U.S. city destination for overseas travelers to the U.S. in 2005, ranking behind New York City, Los Angeles, San Francisco, Miami, and Orlando.

## ■ CURRENT INDUSTRY DEVELOPMENTS

### ☛ Hawai'i Air Seat Capacity Outlook Bright for Summer

Total air seats are projected to increase 1.8 percent this summer (June-August) compared to last summer, according to a state [Department of Business, Economic Development, and Tourism](#) (DBEDT) analysis of OAG flight schedules. Domestic air seats are set to rise 4.3 percent, while international air seats are forecasted to decline 5.3 percent during the summer's three-month period.

- Scheduled non-stop air seats to Hawai'i from the U.S. West are projected to rise 7.3 percent, reaching more than 1.7 million seats this summer.
- Scheduled air seats from the U.S. East are projected to decrease 9.3 percent between June and August, with significant drops expected in Houston (-30.9%) and Minneapolis (-45.6%), the MMA's fourth and fifth largest gateways, respectively.
- Japanese scheduled air seats will decrease 12.5 percent this summer, with drops in the Osaka market (-28.4%), and Tokyo-Narita (-1.4%).
- Canadian air seats are projected to grow 32.5 percent this summer, with a significant boost in seats from Hawai'i's largest gateway, Vancouver (+28.1%).

**Domestic Scheduled Air Seats Outlook\* to Hawai'i  
Summer 2006 (June-August)**

	June-August 2006	% Change
<b>Domestic Total</b>	<b>2,073,737</b>	<b>4.3%</b>
<b>U.S. West</b>	<b>1,743,467</b>	<b>7.3%</b>
Los Angeles	662,574	2.7%
San Francisco	328,873	-20.5%
Phoenix	148,088	155.0%
Seattle	102,106	16.3%
Oakland	93,664	53.4%
Las Vegas	81,288	41.1%
Salt Lake City	74,955	41.9%
San Diego	59,874	-5.1%
Portland	55,192	8.3%
Sacramento	35,696	9.6%
Orange County	34,224	-40.0%
Denver	26,545	0.5%
San Jose	24,288	118.3%
Ontario	16,100	na
<b>U.S. East</b>	<b>330,270</b>	<b>-9.3%</b>
Chicago	86,644	-1.3%
Atlanta	66,300	25.5%
Dallas	58,088	-7.5%
Houston	46,285	-30.9%
Cincinnati	26,220	-0.7%
Minneapolis	24,840	-45.6%
Newark	21,893	1.7%

\* DBEDT analysis based on flights in OAG flight schedules as of May 2006.

\*\* These are scheduled air seats and may be subject to change.

## 3. NATIONAL / INTERNATIONAL

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### ■ CONSUMER TRAVEL BEHAVIORS

#### ☛ Japanese Tourism Trends: Mother-Daughter Travelers Prefer Non-Peak Travel Season

Mother-Daughter travelers from Japan favor traveling during off-peak times, according to a survey conducted by Japan Tourism Marketing (reported by *Travel Journal International*). When asked about travel preference, the majority of these mother-daughter travelers stated they prefer to travel during "any weekdays except peak days," mainly because destinations were "vacant," offered "cheaper prices," and it was "easier to book." Three-generation family travelers, on the other hand, prefer to vacation during the peak summer travel season – mainly because it was "easier to take leave" and that "schools are out," according to the poll.

*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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