

"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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Consumer Travel Behaviors

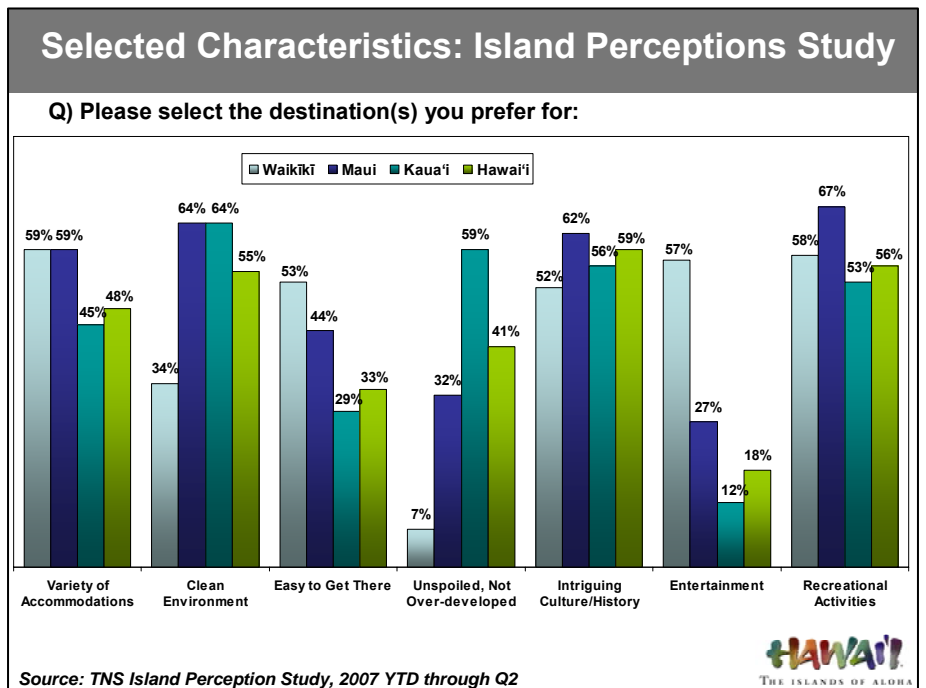
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1. FEATURE

➔ New Study Sheds Light on Island-Specific Brand Characteristics

A new Island Perceptions study commissioned by HVCB (conducted by TNS) reveals distinct brand characteristics of Hawai'i's island destinations (including Waikiki, Outside Waikiki, Kauai, Maui, and Hawai'i Island). According to the online survey of panelists who have visited the state in the previous 12 months, Waikiki is perceived to have a diversity of assets – a balance of entertainment, nightlife, cuisine, and outdoor recreation/adventure activities. Other conclusions from the ongoing study include:

- Maui is recognized as a destination that is good for families and those seeking romance, with a plethora of outdoor recreational activities
- Kauai is perceived by the panel as a great place to "get away from it all," for rest and relaxation, and nature-based activities. The Garden Isle also ranked high in romance.
- Hawai'i Island is distinguished as having new discoveries, a unique scenery, and an intriguing culture and history.



Panelists responded to 28 individual destination attributes, which have been found to cluster around the following five categories:

- Easy, Value, Safe, Clean
- New Discoveries/Unique
- Entertainment/Nightlife
- Active Recreational Choices
- Romantic, Family, Friendly, Relaxing

Results from each of these categories are available on [Market Trends Online](#). Click on the "Island Preferences/Perceptions Study" link under "Special Analyses and Recent Presentations."

<http://www.hvcb.org/trends>

OVB Annual Luncheon
Celebrating 10 Years of Progress

The O'ahu Visitors Bureau invites you to attend its *Annual Luncheon*, being held at the Hyatt Regency Waikīkī Resort & Spa, on October 24, 2007. Cost is \$55 per person or \$500 per table of 10. For more information, call:

(808) 524-0722

RSVP by Friday, October 12, 2007

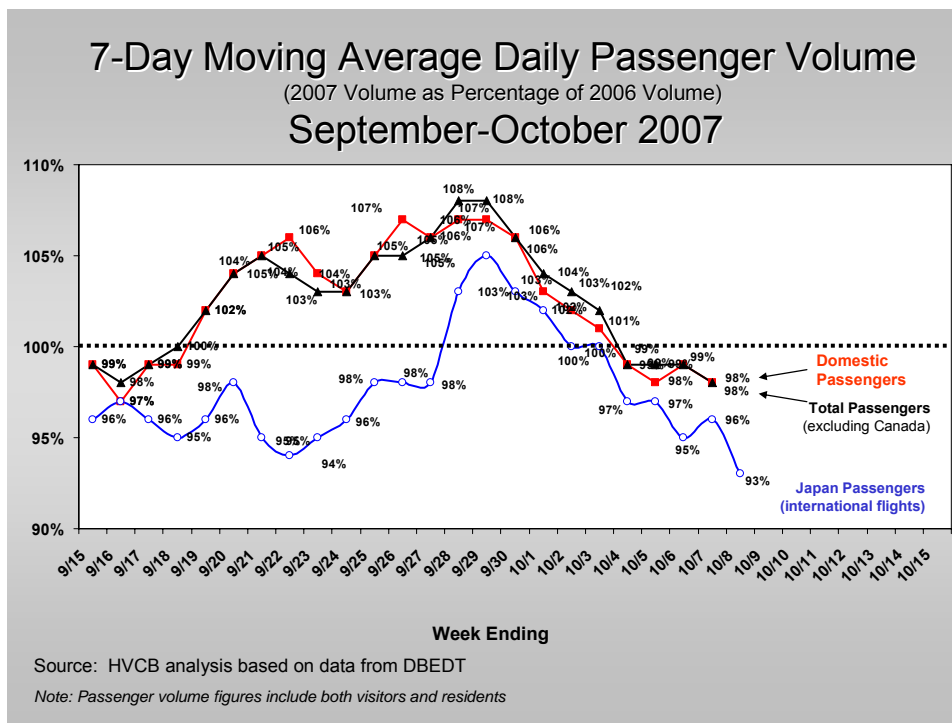
2. HAWAII

■ CONSUMER TRAVEL BEHAVIORS

➡ Domestic Passenger Volume to Hawai'i Two Points Below Prior-Year Levels for the Week

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic passenger volume on nonstop flights to Hawai'i was two points below prior-year levels for the seven-day period ending October 8, 2007. Total domestic and international (excluding Canada) passenger volume ended the period down two points, while nonstop passenger volume from Japan to Hawai'i was down seven points 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 Air Seat Capacity Projected to Decline Between October and December

Total scheduled, non-stop air seats to Hawai'i are projected to decline 6.1 percent between October and December 2007 compared to the same months last year, according to the state [Department of Business, Economic Development, and Tourism](#) (DBEDT) air seat forecast based on OAG flight schedules.

- After surging +9.3 percent in the fourth quarter of 2006, domestic seats are forecasted to decline 4.7 percent, totaling under 1.8 million during the same three-month period in 2007.
 - Scheduled non-stop air seats to Hawai'i from the U.S. West are projected to decline 4.8 percent (to just under 1.5 million), with notable declines in Los Angeles (-12.5%) and San Francisco (-12.8%), Hawai'i's top two markets.
 - These declines are only partially offset by increases in Seattle (+43.0%); Denver (+8.6%); Las Vegas (+8.0%); Oakland (+7.2%); and Portland (+2.7%).
 - A 4.3 percent shortfall is projected in U.S. East capacity during the period, with a significant drop expected in Chicago (-12.8%). However, each of the other markets (Atlanta, Dallas, Houston, Minneapolis, and Newark) are forecast to be up or flat between October and December.
- International seats are expected to be down 9.7 percent during the period, with notable declines from Japan (-10.4%), and Canada (-29.4%).

3. NATIONAL / INTERNATIONAL

■ CONSUMER TRAVEL BEHAVIORS

➤ JTB Forecasts Healthy Japanese Travel Demand This Autumn

An online survey* conducted by the [Japan Travel Bureau](#) (JTB) reveals that 58.1 percent of respondents will travel this autumn (September 1 – November 30), up one percentage point from last year, and nearly three points above demand during the fall season in 2005. In addition, fall travel demand is also outpacing projected travel for the 2007 summer season, when 55.2 percent indicated that they would travel. Other findings from the study include:

- Travel demand this autumn rises with age, with some 70 percent over the age of 60 intending to travel. Only 50-60 percent of respondents in their 20s and 30s stated that they intend to travel.
- Respondents most prefer to travel with friends/acquaintances (31.5%), followed by spouse (29.5%), and alone (18.9%).

** Online survey of 1,300 respondents of each gender from five age groups (130 each of those in their 20s, 30s, 40s, 50s, and 60s). Subjects had to have spent, or intend to spend at least one night away from home during the autumn period (excluding business/commercial travel).*

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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