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## HVCB Tourism Industry Update

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"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.

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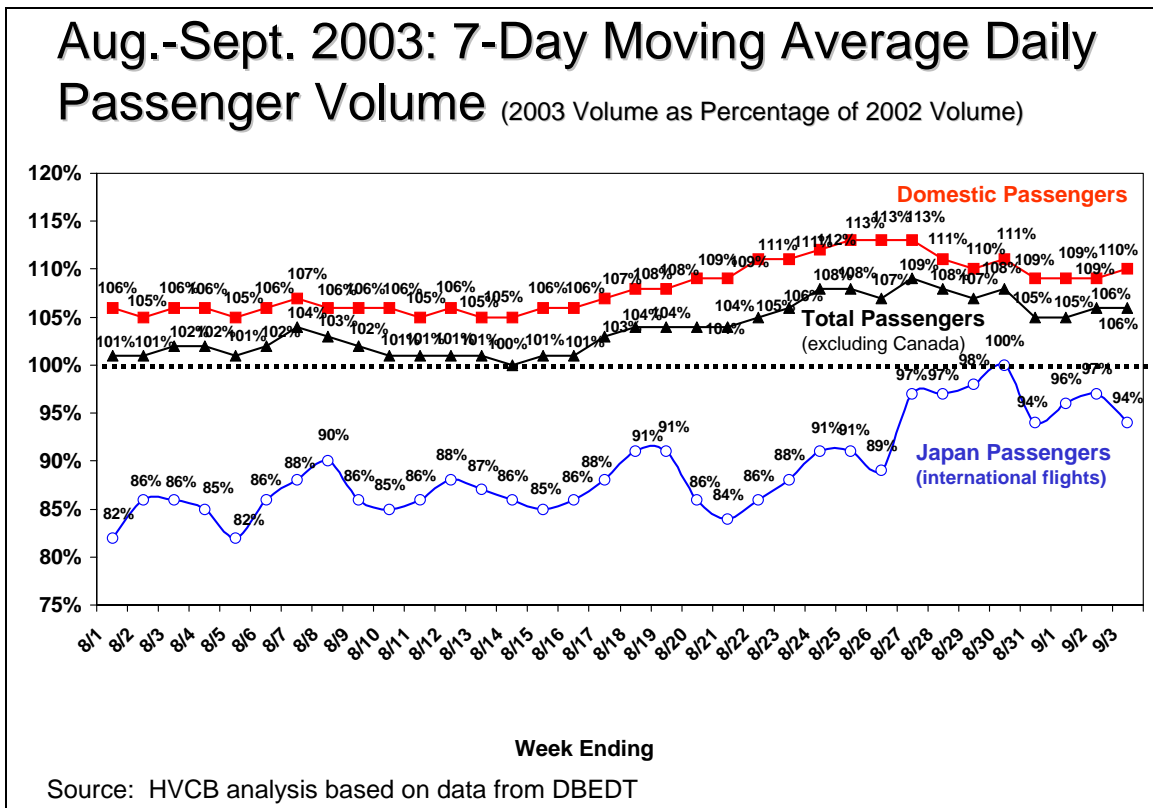
### **Feature**

- **Hawai'i Arrivals Continue to Outpace Total Outbound Japanese Travel in July**
  - Recently released numbers from the Japan National Tourist Organization (JNTO) indicated that Japanese arrivals to Hawai'i continued to outperform total outbound travel in July.
    - According to JNTO's provisional numbers reported in *Travel Journal International*, 968,000 Japanese ventured overseas in July – a decrease of 31.9 percent compared to July 2002, but an improvement from losses observed in May (-55.6%) and June (-46.4%). Year-to-date through July, total Japanese overseas travel is down by 23.0 percent.
    - By comparison, numbers from the state Department of Business, Economic Development and Tourism show that Japanese arrivals to Hawai'i in July were down by 20.9 percent; and 17.1 percent below 2002 levels on a year-to-date basis.
  - Separately, *Travel Journal International* reports that with an anticipated recovery in outbound travel in October or November, between 13.0 and 13.5 million Japanese are expected to travel overseas in 2003 – a decrease of about 20 percent compared to the 16.5 million travelers in 2002.
    - According to the Japan Tourism Marketing Company forecast, total outbound travel in 2003 could recede to 1994 levels (13.58 million) – its lowest level in nine years.

## Hawai'i

### CONSUMER TRAVEL BEHAVIORS

- **Momentum in August Carries into Early September Passenger Arrivals** - Following a 3.7 percent increase in total passenger arrivals during the month of August 2003 (compared to the same month in 2002), total passenger arrivals continued to outpace prior year levels in the early days of September 2003 – a month in which arrivals are expected to be boosted by three meetings at the Hawai'i Convention Center with an estimated 8,700 attendees.
  - The average number of total passengers arriving in the state aboard domestic and international (excluding Canada) flights stood at 106 percent of last year's level for the seven-day period ending September 3, 2003.
  - The average number of nonstop passengers from Japan arriving in Hawai'i continued to improve, reaching 94 percent of 2002 levels for the seven-day period. In addition, statistics from the state [Department of Business, Economic Development and Tourism](#) indicated that nonstop domestic passenger arrivals continued to perform above 2002 levels, ending the seven-day period at 110 percent of last year's figures.



- **Hawai'i Cruise Visitor Arrivals Surge in First Half of 2003** – Cruise ship visitors to Hawai'i surged 16.7 percent in the first half of 2003, according to newly released numbers from the state [Department of Business, Economic Development and Tourism](#). In addition, the growth in cruise arrivals was accompanied by a 4.7 percent increase in cruise visitor onshore per-person-per-day spending to \$95.73 in the first half of 2003 (up from \$91.48 in 2002).

- **CURRENT INDUSTRY DEVELOPMENTS**

- **Hawai'i Hotel Occupancies Heat Up in July** – The statewide hotel occupancy rate heated up 4.7 percentage points in July to 79.6 percent, reports Hospitality Advisors, LLC. Boosted by gains in domestic arrivals, the statewide occupancy rate attained in July was the state's second highest July occupancy recorded in the last decade. Meanwhile, statewide average daily room rates held steady (+0.2%) at \$143.50.
- **Japan Carriers Plan Regional Charter Flights to Hawai'i** – Japan Airlines (JAL) and All Nippon Airways (ANA) have announced plans to operate charter flights from Japan's regional airports starting in the fall, according to *Wing Travel Daily*. ANA will be operating 30 Honolulu-bound charters, including service from Sendai, Sapporo, Kansai and possibly Ube and Toyama. Meanwhile, JAL will operate 11 charter flights from Sendai to Honolulu in place of its previously scheduled service. Increases in charter flights often follow cutbacks in scheduled flights and help to satisfy and build demand, at which point, scheduled flights might resume.

### ***National and International***

- **CONSUMER TRAVEL BEHAVIORS**

- **U.S. Theme/Amusement Park Visits Climb in 2002** – Visits by Americans to theme and amusement parks in the U.S. continued to climb in 2002, according to the [Travel Industry Association of America](#) (TIA). Theme and amusement parks last year attracted a record 92.4 million domestic person trips, an increase of five percent compared to the previous year. TIA research also indicates that visits to theme and amusement parks tend to be family vacations, with such travelers posting a longer length of stay (5.3 nights) and a greater propensity to travel by air (19%) than the average U.S. traveler.

- **CURRENT INDUSTRY DEVELOPMENTS**

- **Guam Proposes \$13.6 Million Tourism Budget** - A proposal to provide the Guam Visitors Bureau (GVB) with \$13.6 million in funding for the next fiscal year is currently under consideration by the Guam legislature, reports *Travel Journal International*. Within the proposed budget, GVB would allocate \$9.8 million to marketing in Japan.

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*We welcome any suggestions or comments that you may have that will help us improve the quality of the weekly "HVCB Tourism Industry Update" for our readers. Please feel free to share your ideas with Gail Chew via email at: [gchew@hvcb.org](mailto:gchew@hvcb.org)*