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HVCB Tourism Industry Update

Issue: 03:37, September 22, 2003 (10:00 A.M.)

"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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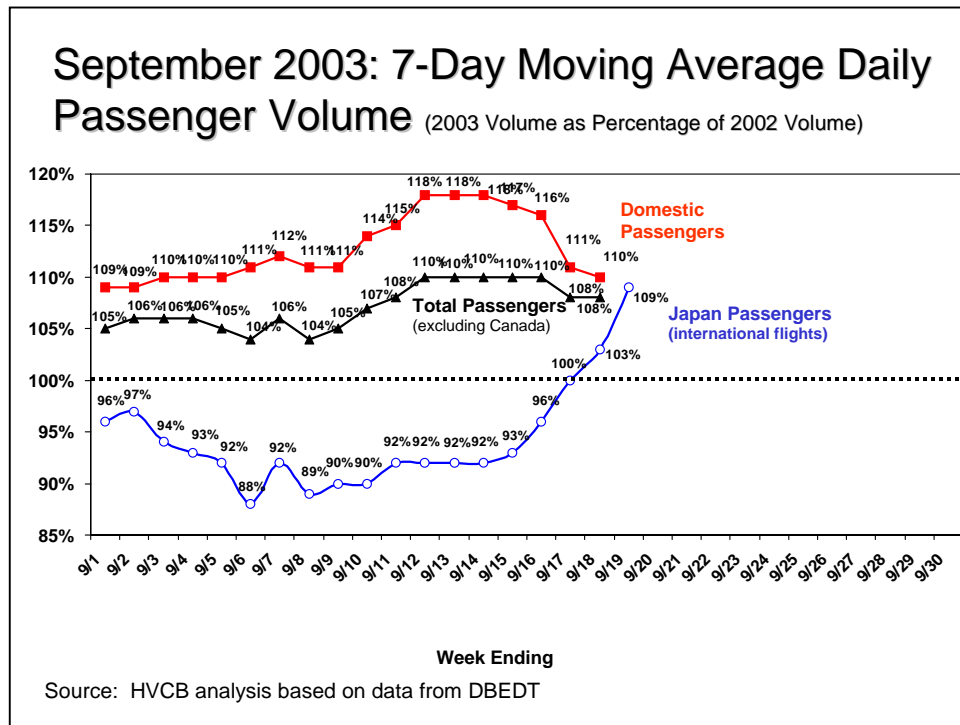
- **Survey: Repeat Travelers Important to Recovery of Japanese Outbound Market**
 - A survey conducted in July by the Japan Tourism Marketing Company (JTM) reported that the recovery of the Japanese outbound travel market will depend on experienced, repeat travelers, according to *Travel Journal International*.
 - Of 1,300 Japanese residents 20 years and older in three major cities in Japan (Tokyo, Osaka and Nagoya) polled, 66.7 percent stated that they would like to travel overseas now - a figure much higher than previous polls taken by JTM.
 - Nearly 86 percent (85.7%) of Japanese seasoned travelers polled stated that they desired to travel, significantly higher than the 64.8 percent of inexperienced/first-time travelers stating the same.
 - Nearly twenty percent (19.8%) of respondents said that their family and friends discouraged their travel abroad, while 14.8 percent stated that their travel companions hesitated to travel abroad earlier in the year.

- Business travel abroad also experienced a downturn - 12.4 percent of respondents said that their employers prohibited international business trips to certain destinations and areas, while 9.9 percent stated that all international business trips were forbidden. Another 12.4 percent stated that their employers prohibited all overseas travel for their employees even for leisure purposes.
- The study also revealed that Japanese travel consumers cite lack of time and money as the biggest barriers to travel, now that SARS and global conflicts are less of a concern.

Hawai'i

CONSUMER TRAVEL BEHAVIORS

- **Japanese Passenger Volume Outpaces 2002 Levels** - The average number of nonstop passengers from Japan arriving in Hawai'i outperformed 2002 levels (+9%) for the seven-day period ending September 18, 2003. According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic and international (excluding Canada) passengers reached 108 percent of last year's number. Nonstop domestic passengers continued to perform above 2002 levels, but slowed to 110 percent of last year's figures for the seven-day period.



CURRENT INDUSTRY DEVELOPMENTS

- **HVCB Wins National Tourism "Destiny" Award From TIA** - The [National Council of Destination Organizations](#), an industry council of the Travel Industry Association of America (TIA), awarded HVCB with a coveted Destiny Award for its "Sharing Aloha" program. The "Sharing Aloha" program, which offered free Hawai'i vacations to September 11 rescue workers and their families, was recognized with a "Judges' Special Award" in honor of its altruistic, public-spirited goals. Hawai'i hosted 1,200 families between December 2001 and December 2002.

National and International

▪ **CONSUMER TRAVEL BEHAVIORS**

- **BTS Survey: Travelers Spend More Time at Ticket Check-In Than Security Checkpoints** - The Bureau of Transportation Statistics' August 2003 [Omnibus Household Survey](#) revealed that air passengers at U.S. airports wait an average of 22 minutes at airline ticket counters and spend an average of 14 minutes clearing security checkpoints. When asked about how passengers felt about the amount of time waiting in line at security checkpoints, 51 percent stated that it was "about what they expected," while 38 percent said it was "less than they expected." An overwhelming majority (82%) stated that the thoroughness of the screening process was "adequate."
- **TIA: Travel Price Index Increases 2.5 Percent in August** - The Travel Industry Association of America's (TIA) [Travel Price Index](#) (TPI) increased 2.5 percent in August 2003, compared to the same month last year. Airfares increased 1.2 percent compared to August 2002 while lodging prices were relatively flat (+0.6%) for the month. The TPI is a monthly indicator of the price change in travel goods and services available to the U.S. consumer.
- **Mariana Islands Looking to Surpass 2002 Japanese Arrivals Levels** - The Marianas Visitors Authority (MVA) reported that Japanese visitation to their island reached 25,517 in August, down 2.7 percent compared to the same month last year, according to *Travel Journal International*. With 21.1 percent of Japanese visitors traveling with children, the growth of the family market has been especially positive. Year-to-date (through August), Japanese arrivals to the Mariana Islands are down 4.5 percent compared to the same period last year.
- **New York City Sets New Records in 2002 for Domestic, Family Arrivals** - New York City welcomed a record 30.2 million domestic visitors in 2002, an increase of 2.2 percent over 2001, according to [NYC & Company](#), the city's official tourism marketing organization. New York City remained the nation's number two destination for domestic travel in 2002, trailing Orlando but outpacing Las Vegas. In addition, New York City also set a new record in family travel, up four percent from 2001 to 10.7 million visitors in 2002.

▪ **CURRENT INDUSTRY DEVELOPMENTS**

- **Department of Transportation Activates Special Plans for Hurricane Isabel** - Hurricane Isabel led to the cancellation of nearly 5,700 flights, affecting 20 airports throughout the Atlantic coast region, according to the [U.S. Department of Transportation](#) (DOT). In response to the hurricane, DOT has activated its Crisis Management Center (CMC), which assists the affected areas to cope with Isabel's devastating effects. DOT also pre-dispatched federal repair crews to aviation and rail sites in order to quickly restore transportation services in the affected areas.

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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