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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

- **Study Provides New Consumer Insights Into Hawai'i Golf Visitors**
 - Results from research on golf visitors to Hawai'i conducted by Market Trends Pacific, Inc., for HVCB and HTA, were presented in a special forum at the Hilton Hawaiian Village on November 5, 2003. The study results were compared with findings from two similar mail surveys* of PGA TOUR Partners Club members on the mainland, and attendees at three PGA TOUR tournaments in New York, Texas, and Illinois. Highlights of the research showed:
 - *Golf Does Matter* -- Golf is an important consideration in selecting a leisure destination. Among Hawai'i golfers*, 90 percent stated that golf is an important consideration in selecting a leisure destination, including 52 percent who said it was "Very Important." Among Mainland golfers*, 78 percent rated golf as an important consideration in destination selection, including about one-third (34%) who said it was "Very Important."

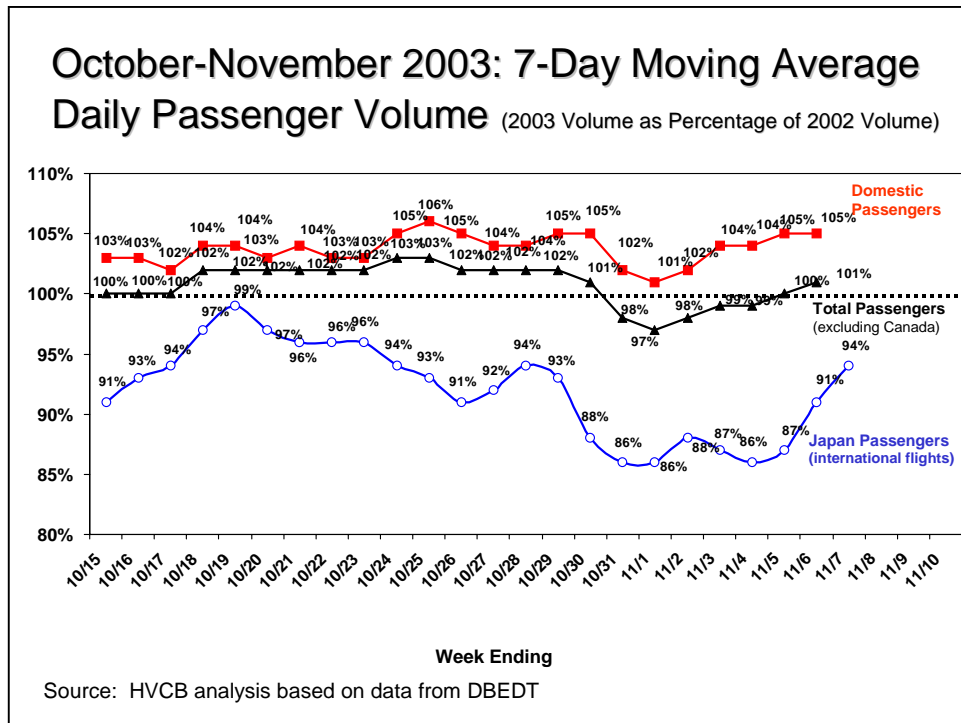
**Note: "Hawai'i golfers" refer to those surveyed in Hawai'i at golf courses; "Mainland golfers" mostly refer to PGA TOUR Partners Club members.*

- *Active Vacationers* -- Golfers do more than golf. In addition to golfing, a significant number of Hawai'i golf visitors said they had participated in or planned to participate in snorkeling/scuba (46%); tour/sightseeing (29%); beach (25%); and shopping (19%).
- *Short Booking Windows* -- Golf vacation booking windows are short. The majority (70%) of U.S. Mainland golfers book their golf vacations within three months of departure, including nearly half (48%) who book their vacations only two months in advance. These booking windows held relatively consistent among Hawai'i golf visitors and golfers surveyed on the Mainland.
- *Affluent Consumers* -- Golfers are affluent consumers. Nearly half (49%) of Mainland golfers surveyed reported annual household incomes of \$100,000 or more; and nearly seven of 10 (68%) Hawai'i golf visitors reported incomes in the \$100,000+ neighborhood.
- *Golfers are Coming* -- More than half (56%) of Mainland U.S. golfers surveyed reported plans to visit Hawai'i, including more than 90 percent of which were planning to visit in 2003 and/or 2004. These future Hawai'i golf visitors were largely residents of the Central and Eastern regions of the U.S.

Hawai'i

▪ CONSUMER TRAVEL BEHAVIORS

- **Domestic Passenger Volume to Hawai'i Five Percent Above 2002 Levels** - Domestic passenger volume continued to perform above 2002 levels, up five percent for the seven-day period ending November 6, 2003. According to statistics published by the state [Department of Business, Economic Development and Tourism](#), nonstop passengers from Japan arriving in Hawai'i was 94 percent of 2002 figures, and total domestic and international (excluding Canada) passenger volume was 101 percent of last year's figures for the seven-day period.



▪ **CURRENT INDUSTRY DEVELOPMENTS**

- **Hawai'i Meeting and Incentive Benefits Showcased for ICPA** - Last week, [HVCB](#) and the Maui Visitors Bureau (MVB) lead a delegation of Hawai'i travel companies and suppliers to promote the Islands' meeting and incentive benefits at the 2003 Insurance Conference Planners Association (ICPA) Convention, in Orlando, Florida. ICPA, which is considered the nation's top insurance planners association comprised of meeting, convention and conference planning professionals, is scheduled to hold its annual meeting at Maui's Grand Wailea Resort Hotel & Spa (November 11-14, 2004).
- **IAGTO: Hawai'i a Finalist for "Golf Destination of the Year"** - Hawai'i is one of ten global finalists for the 2003 "[Established Golf Destination of the Year](#)" award, presented by the International Association of Golf Tour Operators (IAGTO). Hawai'i and the other finalists were nominated based on scoring by 120 leading golf tour operators in 24 countries. IAGTO asked operators to rate golf destinations in six categories: Customer Satisfaction; Quality of Golf Courses and Accommodations; Value for Money; Support from Suppliers, Tourist Boards and Airlines; Professional Conduct of Suppliers; and Accessibility to Tee Times. The winner will be announced on December 10, at the 2003 International Golf Travel Market, being held this year in the Dominican Republic.

National and International

▪ **CONSUMER TRAVEL BEHAVIORS**

- **AMEX Travel Index: American Travelers Projected to Fly More in 2004** - A majority of American leisure travelers (55%) plan to take an air trip next year, up from 44 percent in 2002, according to the latest [American Express Leisure Travel Index](#). Seventy-seven percent (77%) plan to use a discount carrier next year for a variety of reasons: Discounted price (63%); good flight schedules (36%); and the "same, or better service as larger carriers" (36%). In addition, nine percent of respondents plan to go on a cruise next year, up from five percent in 2002.
- **Study: Female Business Travelers Frequently Book Online** - Eighty percent (80%) of women business travelers purchase airline tickets online and 75 percent book hotel reservations online, according to a survey conducted by New York University's [Center for Hospitality, Tourism and Sports Management](#) (NYU Tisch Center) of 700 female business travelers. In addition, 64 percent of respondents "frequently" search online before booking an airline ticket, while nearly half also search online before booking a hotel room. The study also reveals that women business travelers prefer proprietary airline and hotel sites as their first choice for booking online.
- **IATA: International Air Passenger Traffic in September up One Percent** - Preliminary [International Air Transport Association](#) (IATA) traffic figures for September 2003 show that international passenger traffic is up for the first time since February 2003. Revenue passenger kilometers (RPK) in September 2003 are up one percent over the same month last year. For the first nine months of 2003, overall RPKs are down 4.9 percent from 2002 levels.
- **AAA National Travel Barometer: October Travel Bookings Up Three Percent** - The latest monthly [AAA National Travel Barometer](#) indicates that overall travel bookings in October were up three percent, compared to October 2002. Cruise and tour bookings increased for the fifth consecutive month. The AAA barometer, which is based on a sample of 13 clubs representing more than half of the association's 46 million members, was established to gauge the domestic leisure travel market. When comparing October 2003 to October 2002:
 - Car rental reservations -- up 18 percent (to 20,181)
 - Tour packages -- up four percent (to 30,896)
 - Cruise bookings -- up six percent (to 26,938)
 - Hotel bookings -- down four percent (to 40,664)

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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