



SPOTLIGHT ON: Romance Travelers PG2



Photo courtesy of Hawaii Tourism Authority (HTA)

A monthly update including relevant information on travel industry trends, consumer and meetings market research, competitive intelligence, and Hawai'i's performance as a destination.

MARKET INSIGHTS UPDATE

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Romance Travel Industry

It's the month for romance, and while February has traditionally been associated with roses, heart-shaped chocolates, and fancy dinners out, travel should not be left off the list. Romance – and romance travel in particular – is not what it used to be, thanks to recent generational, social, and technological changes. U.S. consumers, and millennials in particular, are increasingly likely to celebrate every milestone in life by taking a trip. This not only means destination weddings and far-off honeymoons, but also a growing interest in proposal trips, bachelor and bachelorette weekend getaways, vow renewals, anniversary celebrations, and babymoos. As a result, the romance segment of the travel industry is growing rapidly.

Today's romance travelers differ from generations past; they are more active and are likely to split their time between quiet moments alone and active exploration around their destination

of choice. Couples are no longer just settling in for a week of lounging on the beach. While they are still partaking in couples' spa treatments and many of the traditional activities associated with romance travel, they are also increasingly interested in cultural and other excursions they can experience together. Honeymooners and destination wedding goers are seeking out more diverse experiences, incorporating elements ranging from soft adventure to volunteer work on their once-in-a-lifetime trip. Romance travel today is about sharing authentic local experiences and capturing awe-inspiring moments unique to each destination. The new needs of the modern romance traveler provide an opportunity for Hawai'i's visitor industry to better serve this changing market segment and to demonstrate the range of romance travel experiences available on the Hawaiian Islands.

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Airfare Update

The average cost of airfare to Hawai'i from the U.S. mainland dropped by double digits in the third quarter of 2018, driven primarily by a large increase in air seat capacity from both the U.S. West and U.S. East markets.

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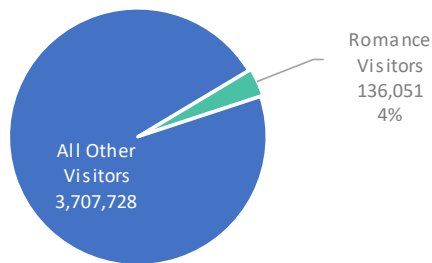




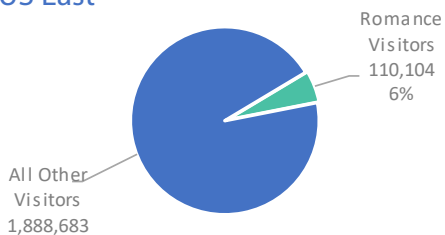
Romance Travel Industry

Romance Travelers by the Numbers

US West



US East



Source: HTA Annual Visitor Research Report 2017, visited Hawai'i to get married or for a honeymoon

Destination Weddings

Destination weddings have evolved over time to incorporate an ever-increasing number of guests as part of the travel party. While price is always a factor, destination wedding travelers are often more concerned with the overall experience than with the price tag of the wedding. Price itself is not always the determining factor; services, inclusions, and experiences help determine the perceived value of a destination.

Today's destination wedding couples are not nearly as interested in the cake, flowers, or etiquette of a traditional wedding. Instead, they prefer that their guests come away having had a great time. More modern couples are seeking fun, group excursions for their guests, complete with high-end photography and drone videos. In addition, couples are looking for ways

to elevate the destination wedding experience through unique ceremony locations and themes.

Hawai'i consistently ranks among the most-desired locations for destination weddings. In 2017, more than 101,000 visitors came to Hawai'i to get married. The U.S. market makes up over half (52%) of Hawai'i's destination wedding visitors. The number of U.S. visitors who came to Hawai'i to get married in 2017 was up slightly from the year prior (+2%). Wedding travelers to Hawai'i are younger than the average visitor (37 versus 45 years old), are likely to be first time visitors to the state (48% versus 34%), and are much more likely to stay in a hotel (73% versus 62%). Destination wedding visitors are also more likely to visit O'ahu (68%), followed by Maui (26%), the Island of Hawai'i (15%), and Kaua'i (12%).

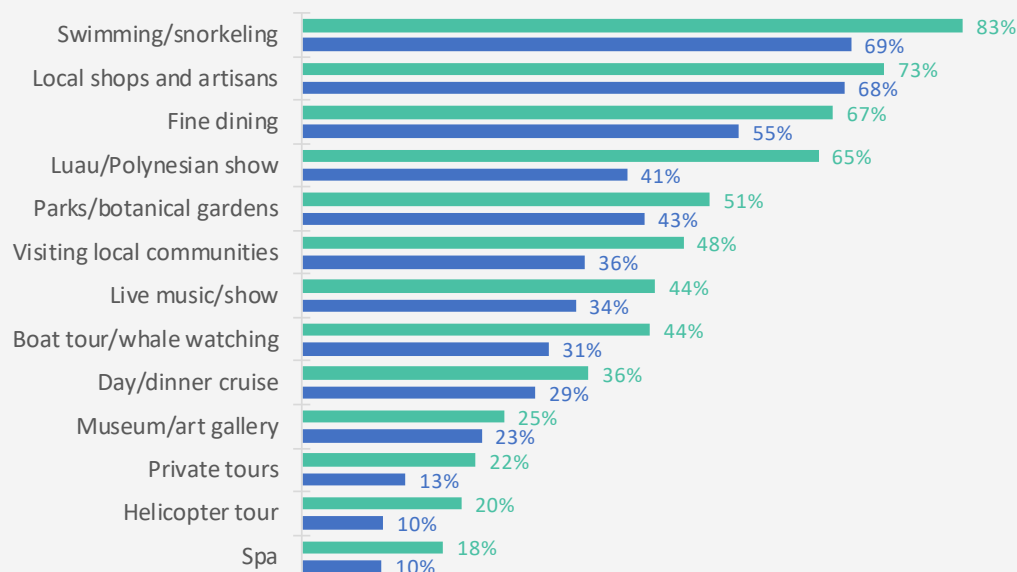
Hawai'i's Romance Visitor

	Length of Stay	Hotel Accommodation	First Time Visitor	Average Age
All Visitors	9.0 days	62%	34%	45
Get Married	8.3 days	73%	48%	37
Honeymoon	7.6 days	88%	73%	33

Source: HTA Annual Visitor Research Report 2017

Top Romance Traveler Activities in Hawai'i

■ Romance Visitors ■ All US Visitors



Source: HTA Visitor Satisfaction & Activity Report 2017

Honeymooners

The honeymoon tradition of relaxation and downtime is on the decline. Couples are increasingly looking to achieve a well-balanced vacation of contrasting experiences. Many honeymoon couples, and millennials in particular, are increasingly interested in global travel, adventure, and culinary experiences. These couples want to explore parts of the world they have never seen before and experience different cultures and lifestyles.

In 2017, nearly 575,000 visitors traveled to Hawai'i for their honeymoon. The U.S. market makes up approximately 36 percent of honeymooners to Hawai'i. The number of U.S. visitors who came to Hawai'i for their honeymoon grew to over 206,000 in 2017, up +4 percent from the year prior. Honeymoon travelers are even younger than their destination wedding counterparts, averaging 33 years old. They are much more likely to be first time visitors (73%) and the vast majority stay in hotels (88%). Honeymooners tend to prefer O'ahu (76%), followed distantly by Maui (26%), the Island of Hawai'i (15%), and Kaua'i (13%).

Hawai'i as a Romance Destination

In trending with what is important to the modern day romance traveler, Hawai'i's

romance visitors are more active and adventurous than the general U.S. visitor population. While in Hawai'i, U.S. romance visitors are much more likely to see a lū'au (+24 percentage points), go swimming or snorkeling (+14 points), take a boat or whale watching tour (+13 points), visit local communities (+12 points), participate in fine dining (+12 points), see a live music show (+10 points), and/or take a helicopter ride (+10 points).

Among U.S. visitors who traveled Hawai'i to get married or for their honeymoon, nearly 91 percent rated their vacation as excellent, two percentage points higher than U.S. visitors overall. In fact, 63 percent said their trip exceeded their expectations, significantly above U.S. visitors in total (47%). Similarly, 94 percent of U.S. romance visitors say they are likely to recommend Hawai'i to their friends or family, slightly above the general U.S. traveler (89%). This speaks to the destination's success on delivering a superior romance travel product that leaves a memorable and lasting impression in visitors minds.

Sources: HVCB analysis of Travel Weekly 'Redefining Romance', HTA Visitor Satisfaction & Activity Report 2017, HTA Annual Visitor Research Report 2017



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Airfare Update

Sneak Peek at Next Month



Spotlight On:
Sustainability

The average round-trip airfare from the U.S. mainland to Hawai'i decreased -10 percent in the third quarter of 2018, totaling just \$626 per ticket. Fares from the U.S. West decreased -11 percent to \$532. Airfares were down across many major markets, including Los Angeles (-15%), Seattle (-11%), and San Francisco (-10%). Meanwhile, fares from the U.S. East fell -9 percent to \$868. Houston saw

the largest drop in fares at -21 percent, while fares from Denver were down -11 percent, Chicago was down eight percent, and New York City was relatively flat. Part of what was driving the drop in fares was an +8 percent increase in nonstop air seats from the U.S. West market (+155,500 additional seats), and a +10 percent increase in nonstop seats from the U.S. East (+24,500 seats) in Q3 2018.