

Chronological: Hawaii Congress of Planning Officials, Maui

Senator Daniel K. Inouye Papers
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O THE TRAVEL INDUSTRY IS THE SECOND LARGEST

RETAIL OR SERVICE INDUSTRY IN THE U.S.

(FOOD STORES - \$238 BILLION; TRAVEL -

\$191 BILLION).

O THE TRAVEL INDUSTRY ACCOUNTED FOR 7% OF TOTAL

EMPLOYMENT IN 1980.

O IN 1981, VISITOR EXPENDITURES IN HAWAII TOTALED

\$3.2 BILLION.

O IN HAWAII, OUR VISITOR RECEIPTS ARE MORE THAN 4

TIMES THE REVENUES JAPAN RECEIVES FROM FOREIGN

VISITORS.

(Taken from speech to
Hotel Sales Management Assn.
6/17/83.)

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- 0 IN 1982, ONLY 12 MAJOR NATIONS RECEIVED MORE VISITOR ARRIVALS THAN HAWAII.
- 0 POLLUTION - JOBS - R&R
- 0 LAND IS CERTAINLY ONE OF THE MOST VALUABLE COMMODITIES IN HAWAII. IT IS INTERESTING TO NOTE THAT THE VISITOR INDUSTRY FACILITIES OCCUPY APPROXIMATELY ONE PERCENT OF THE LAND AREA OF HAWAII (COMPARE THIS WITH THE LANDS UTILIZED BY THE AGRICULTURE INDUSTRY.)
- 0 THE VISITOR INDUSTRY IS THE LEAST ENVIRONMENTALLY POLLUTING OF ALL THE MAJOR INDUSTRIES.

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- O THE VISITOR INDUSTRY PROVIDES EMPLOYMENT FOR
WOMEN, TEENAGERS, AND MINORITIES--THE CATEGORIES
HIT HARDEST BY OUR NATIONAL UNEMPLOYMENT.
- O THE VISITOR INDUSTRY PROVIDES A MUCH NEEDED
SERVICE TO THE GENERAL POPULACE OF THE UNITED
STATES. PHYSICAL REST AND MENTAL RELAXATION
(IT SHOULD BE NOTED THAT ALL OF THE MAJOR
INDUSTRIES OF THE GOVERNMENTS OF THE INDUSTRIALIZED
WESTERN EUROPE REQUIRE THEIR EMPLOYEES TO TAKE
ANNUAL VACATIONS).

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AFTER CITING THE ABOVE, IT WOULD SEEM THAT
TOURISM SHOULD BE UNIVERSALLY SUPPORTED IN
THE UNITED STATES. HOWEVER, FOR REASONS
NOT REALLY COMPREHENSIBLE TO ME, OUR NATION,
MANY OF OUR LAWMAKERS -- FEDERAL, STATE AND
COUNTIES, SEEM TO BE AT BEST "RELUCTANTLY
SUPPORTIVE OF TOURISM.

FOR EXAMPLE, IN WASHINGTON, THE REAGAN ADMINISTRATION
LIKE ITS PREDECESSORS -- DEMOCRAT AND REPUBLICAN -- WANTS
TO ABOLISH THE TRAVEL SERVICE. CONGRESS, ON THE OTHER HAND,
WANTS TO INCREASE THE AGENCY'S BUDGET SUBSTANTIALLY.

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IN FISCAL YEAR 1983, THE TRAVEL SERVICE BUDGET WAS \$8.1 MILLION. THIS YEAR, DESPITE THE ADMINISTRATION'S OPPOSITION, CONGRESS WILL GIVE IT A BUDGET OF SOMEWHERE BETWEEN \$10.1 MILLION (HOUSE) AND \$13 MILLION (SENATE). SO THE CONTRADICTION IS THAT ONE BRANCH OF GOVERNMENT SEES THE TRAVEL SERVICE AS INSIGNIFICANT, WHILE ANOTHER BRANCH OF THE SAME GOVERNMENT BELIEVES THE AGENCY IS SO IMPORTANT ITS BUDGET SHOULD BE INCREASED.

I WOULD NOW LIKE TO RECITE A FEW FACTS AND STATISTICS WHICH SHOULD GIVE YOU SOME IDEA OF HOW MYOPIC OFFICIAL WASHINGTON AND HAWAII ARE AND THUS HOW FORMIDABLE THE TASK AHEAD OF US REMAINS.

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O THE AVERAGE FUNDING AMONG DEVELOPED NATIONS OF
 THE WORLD IS ALMOST 3.5 TIMES AS MUCH AS USTTA'S
 FUNDING.

	<u>U.S. DOLLARS</u> <u>MILLIONS</u>		<u>U.S. DOLLARS</u> <u>MILLIONS</u>
1. CZECHOSLOVAKIA	\$149.1	15. BRAZIL	\$ 16.1
2. TURKEY	62.1	16. GERMANY	15.8
3. GREECE	57.8	17. SYRIA	13.8
4. SPAIN	57.2	18. NETHERLANDS	13.7
5. BELGIUM	44.6	19. JAMAICA	12.8
6. KOREA	30.6	20. INDONESIA	11.3
7. VENEZUELA	30.0	21. AUSTRALIA	11.1
8. CANADA	29.0	22. HONG KONG	10.6
9. FRANCE	27.8	23. MALAYSIA	10.0
10. SINGAPORE	24.3	24. BERMUDA	8.9
11. ITALY	20.5	25. LIBYA	8.8
12. BAHAMAS	20.2	26. FINLAND	8.5
13. PERU	20.1	27. UNITED STATES	8.0
14. COLOMBIA	17.3		

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0 THE UNITED STATES RANKS 17TH IN THE NUMBER OF
GOVERNMENT TOURISM PROMOTION OFFICES IT MAINTAINS
OVERSEAS.

1.	SPAIN	30	10.	SRI LANKA	10
2.	ITALY	18	11.	MACAO	9
3.	GREECE	15	12.	KOREA	8
4.	MOROCCO	15	13.	NORWAY	7
5.	MALAYSIA	14	14.	HONG KONG	7
6.	GERMANY	14	15.	THAILAND	7
7.	YUGOSLAVIA	13	16.	SINGAPORE	6
8.	KENYA	13	17.	UNITED STATES	6
9.	FINLAND	10			

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O THE U.S. SHARE OF WORLD TOURISM RECEIPTS DECLINED
FROM 13% IN 1976 TO 10.6% IN 1980. IN 1981 IT
RETURNED TO 11.5% CHIEFLY BECAUSE OF A WEAK U.S.
DOLLAR.

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O THE DEVELOPED COUNTRIES OF THE WORLD RECEIVE AN
 AN AVERAGE OF ABOUT 3½ TIMES AS MUCH IN INTERNATIONAL
 TRAVEL RECEIPTS AS THE U.S. ON A PER CAPITA BASIS.

	<u>U.S. DOLLARS</u>		<u>U.S. DOLLARS</u>
1. AUSTRIA	76¢	12. UNITED KINGDOM	11¢
2. SWITZERLAND	48¢	13. CANADA	11¢
3. DENMARK	24¢	14. NETHERLANDS	11¢
4. GREECE	20¢	15. GERMANY	10¢
5. NORWAY	19¢	16. PORTUGAL	10¢
6. SPAIN	18¢	17. ICELAND	10¢
7. BELGIUM	16¢	18. AUSTRALIA	8¢
8. FINLAND	15¢	19. NEW ZEALAND	8¢
9. FRANCE	13¢	20. YUGOSLAVIA	6¢
10. ITALY	13¢	21. UNITED STATES	5¢
11. SWEDEN	12¢		

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SO MUCH FOR THE BAD NEWS. THE FOLLOWING EXAMPLES,
I BELIEVE, ILLUSTRATE QUITE CONVINCINGLY WHAT WE CAN EXPECT
IF THE TRAVEL SERVICE IS ADEQUATELY FUNDED NOW AND IN THE
FUTURE.

O GERMANY HAS INCREASED ITS TOURISM PROMOTION
BUDGET BY \$7 MILLION (24% BUDGET INCREASE)
IN THE LAST 5 YEARS. DURING THIS SAME PERIOD
THEIR INTERNATIONAL TOURISM RECEIPTS INCREASED
\$3.4 BILLION (106% INCREASE) (1981).

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- O SRI LANKA HAS INCREASED ITS TOURISM PROMOTION BUDGET BY \$992 THOUSAND (77% BUDGET INCREASE) IN THE LAST 5 YEARS. DURING THIS SAME PERIOD THEIR INTERNATIONAL TOURISM RECEIPTS INCREASED \$69 MILLION (245% INCREASE) (1981).
- O FRANCE HAS INCREASED ITS TOURISM PROMOTION BUDGET BY \$4.7 MILLION (156% BUDGET INCREASE) IN THE LAST 5 YEARS. DURING THIS SAME PERIOD THEIR INTERNATIONAL TOURISM RECEIPTS INCREASED \$5.1 BILLION (164% INCREASE) (1981).

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O SPAIN HAS INCREASED ITS TOURISM PROMOTION BUDGET BY \$9.9 MILLION (83% BUDGET INCREASE) IN THE LAST 5 YEARS. DURING THIS SAME PERIOD THEIR INTERNATIONAL TOURISM RECEIPTS INCREASED \$3.9 BILLION (126% INCREASE) (1981).

O CANADA HAS INCREASED ITS TOURISM PROMOTION BUDGET BY \$3.8 MILLION (23% BUDGET INCREASE) IN THE LAST 5 YEARS. DURING THIS SAME PERIOD THEIR INTERNATIONAL TOURISM RECEIPTS INCREASED \$643 MILLION (38% INCREASE) (1981).

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OVER THE YEARS MANY OFFICIALS IN WASHINGTON AND HAWAII HAVE MAINTAINED THAT SINCE EVERYONE WANTS TO VISIT THE UNITED STATES, ESPECIALLY HAWAII, OUR COUNTRY OR STATE SELLS ITSELF AND THERE IS NO NEED TO SPEND TAX DOLLARS TO PROMOTE IT. TO THE CONTRARY, WE MUST COMPETE VIGOROUSLY WITH MANY OTHER COUNTRIES IN THE INTERNATIONAL TRAVEL MARKET.

I THINK SOME HAVE FELT THE SAME WAY ABOUT HAWAII. BECAUSE WE ARE A TROPICAL PARADISE THERE ARE THOSE WHO HAVE FELT HAWAII WILL SELL ITSELF, OR AT LEAST THE AIRLINES HAVE A SUFFICIENT FINANCIAL INCENTIVE TO PROMOTE OUR STATE.

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BY NOW I HOPE YOU WILL AGREE THAT THERE ARE SEVERAL DESTINATIONS
COMPETING FOR OUR SEGMENT OF THE TRAVEL MARKET, AND OUR VISITOR
INDUSTRY MUST SPEND ITS MONEY AND EFFORT TO PROMOTE HAWAII.

IN THIS CONNECTION, I WOULD LIKE TO QUOTE FROM THE 1983
TRAVEL INDUSTRY WORLD YEARBOOK:

MUCH OF HAWAII'S IMPROVEMENT IN TOTAL TRAFFIC
CAN BE ATTRIBUTED TO REDUCTIONS IN U.S. AIR
FARES, PLUS THE SUCCESS OF THE NEW HAWAII VISITORS
BUREAU MANAGEMENT IN OBTAINING PROMOTIONAL FUNDS
FROM THE STATE LEGISLATURE.

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ONE LESSON THAT HAWAII HAS LEARNED IS THAT
IT IS DANGEROUSLY VULNERABLE TO AIRLINE
MARKETING DECISIONS AND THAT FAVORABLE
DECISIONS DEPEND IN PART ON THE STATE'S
WILLINGNESS TO INVEST ITS OWN FUNDS TO
PRODUCE THE NEEDED PROMOTIONAL IMPACT ON
THE MARKET.

BRIEFLY, I HAVE TRIED TO CHART THE UPS AND DOWNS OF THE
TRAVEL INDUSTRY'S PROGRAMS IN OFFICIAL WASHINGTON AND HAWAII
AND TO GIVE YOU SOME IDEA OF THE TASK BEFORE US, AND WHAT
YOU IN THE INDUSTRY CAN DO TO HELP.

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AT THE SAME TIME, I THINK IT IS IMPORTANT TO KEEP IN MIND
THAT THE SUCCESS OR FAILURE OF THE TRAVEL INDUSTRY DOES
NOT DEPEND ON WASHINGTON ALONE. THE INDIVIDUAL SEGMENTS
OF THE INDUSTRY AND OUR STATE ALSO HAVE RESPONSIBILITIES,
AND EACH MUST DO ITS SHARE. AGAIN, I WISH TO THANK YOU.