

"HVCB Tourism Industry Update" is a bi-weekly briefing of travel news and developments affecting Hawaii's visitor industry, compiled by the HVCB Market Trends Department.

**FOR IMMEDIATE RELEASE**

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### 1. FEATURE

#### ➤ Three-Year Strategic Plan to Promote Waikīkī Re-Launch Developed

Waikīkī is in the midst of a renaissance. Major investment by the private and public sectors continues at an unprecedented rate, resulting in an overall upgrading of Waikīkī accommodations; more accessible, authentic cultural experiences; new dining and shopping offerings; and the potential to attract a higher yielding visitor.

Working with the Hawai'i Tourism Authority, O'ahu Visitors Bureau, industry stakeholders, and the travel trade, HVCB crafted a cooperative marketing plan for Waikīkī that will launch in 2007 and run through 2009.

The cooperative marketing plan works within the framework of the existing statewide plan, which emphasizes the fundamental importance of the natural beauty, diversity of experiences, and the Hawaiian host culture, heritage and Aloha Spirit of the people of Hawai'i. The Waikīkī Strategic Marketing Plan highlights those elements in a manner unique to Waikīkī and the Island of O'ahu. Travel trade and public relations program elements will launch in the first quarter of 2007 with consumer elements to follow in the fall.

Further information about these programs is contained in HVCB's 2007 Annual Tourism Marketing Plan presentation, available online at:

<http://www.hvcb.org/trends>

*(listed under "Recent Presentations")*

#### **Consumers Identify Waikīkī Attributes**

HVCB analysis of TNS Island Perception Study data show that U.S. travelers distinguish Waikīkī from the other Hawaiian Islands. When comparing ratings of Waikīkī to overall average ratings for the Neighbor Islands, Waikīkī indexes higher on destination attributes related to (in rank order):

- Nightlife
- Entertainment
- Cuisine
- Shopping
- Special events
- Ease of access
- Cultural activities
- Recreational activities

#### **Waikīkī Strategic Marketing Plan Highlights**

The marketing plan includes specific trade, consumer, and public relations programs to support the re-launch of Waikīkī. Highlights include:

##### **Travel Trade**

- Trade Launch Events and Sales Blitzes
- Trade Media Support (print, online, e-newsletters/postcards)
- Travel Agent Training (including Waikīkī-specific modules)
- Wholesaler Campaign (print, online, marketing calendars)

##### **Consumer Programs**

- Waikīkī Website
- Media Assets Extranet (images, press releases, factsheets, etc.)
- Waikīkī Brand Video (available to all partners)
- Print Media (cooperative inserts in leading consumer publications)
- Content Feeds (online content feeds for partners for private labeling)
- E-mail Marketing and Integrated Online Media
- Search Campaign

##### **Public Relations**

- News Bureau
- Media Relations
- Society of American Travel Writers

## 2. O'AHU MARKET UPDATE

### ➤ Per-Person-Per-Day Spending Up Four Percent for O'ahu

According to preliminary figures published by the state [Department of Business, Economic Development and Tourism](#), per-person-per-day spending (PPPD) on O'ahu has risen 4.1 percent year-to-date through August 2006, averaging \$173.30. Although total O'ahu arrivals have fallen 3.1 percent (to 3.1 million) through August, total expenditures have reached over \$3.7 billion, down a nominal 0.7 percent.

- U.S. West arrivals to O'ahu are up 1.5 percent through August, while U.S. East arrivals are down 3.7 percent.
- Canadian arrivals are up 3.0 percent, while Japanese arrivals are down 9.2 percent year-to-date.

#### O'ahu Highlights: YTD Through August 2006

	O'ahu	% Cnge
Total Arrivals	3,102,415	-3.1%
Total Expenditures (\$mil.)	3,706.4	-0.7%
PPPD Spending (\$) **	173.3	4.1%
Domestic Arrivals	1,916,714	-0.9%
Int'l Arrivals	1,185,701	-6.6%
Domestic LOS	7.53	-1.4%
Int'l LOS	5.86	-2.8%

Source: DBEDT

### ➤ Domestic Air Seat Capacity to HNL Projected to Increase Four Percent During Fourth Quarter

Total domestic scheduled air seats to Honolulu International Airport are projected to increase 4.1 percent during the fourth quarter of 2006 (October-December) compared to the same quarter last year, according to a [Department of Business, Economic Development, and Tourism](#) (DBEDT) analysis of OAG flight schedules:

- Scheduled non-stop air seats to Honolulu from the U.S. West are projected to reach nearly 941,000 during the three-month rolling air service forecast, up 8.6 percent over prior-year levels. Seats from HNL's largest gateway, Los Angeles, will increase 1.5 percent during the quarter, while San Francisco, the second largest gateway, is expected to show a 14.3 percent drop, mainly due to a shift in lift to Oakland (+282.2%).
- Scheduled air seats from the U.S. East to O'ahu are projected to decrease 11.1 percent during the three-month forecast period. Significant drops are expected to be seen from Atlanta (-21.7%) and Minneapolis (-15.6%), the MMA's third and fifth largest gateways, respectively. The U.S. East's largest gateway city, Houston, will remain even with prior-year levels while the second largest gateway, Chicago, will experience a 1.5 percent increase in air seat capacity.
- Canadian air seats to HNL are projected to grow 28.9 percent during the three-month period.

#### Honolulu Scheduled Air Seats Outlook\* Fourth Quarter 2006

	Oct-Dec 2006	% Change
<b>TOTAL SEATS</b>	<b>1,831,309</b>	<b>4.0%</b>
<b>US TOTAL</b>	<b>1,171,403</b>	<b>4.1%</b>
US West	940,937	8.6%
US East	230,466	-11.1%
<b>INTL TOTAL</b>	<b>659,906</b>	<b>4.0%</b>
Japan	436,203	3.6%
Canada	73,764	28.9%
Other Asia	35,627	-4.8%
Oceania	56,446	-8.6%
Other	57,866	1.8%

\* DBEDT analysis based on flights in OAG flight schedules as of September 2006.  
These are scheduled air seats and may be subject to change.

#### Hawai'i Residents Share Images of O'ahu on [GoHawaii.com](http://www.gohawaii.com)

As part of HVCB's "Picture Hawai'i" 2006 Fall Consumer Marketing Promotion, Hawai'i residents are sharing their favorite photos of O'ahu on [gohawaii.com](http://www.gohawaii.com). The residents' photos are part of a new interactive vacation planner, allowing visitors to see and learn about the Islands through the eyes of the people of Hawai'i. To view the photo gallery, visit:

<http://www.gohawaii.com>

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