



Visitors & Convention Bureau

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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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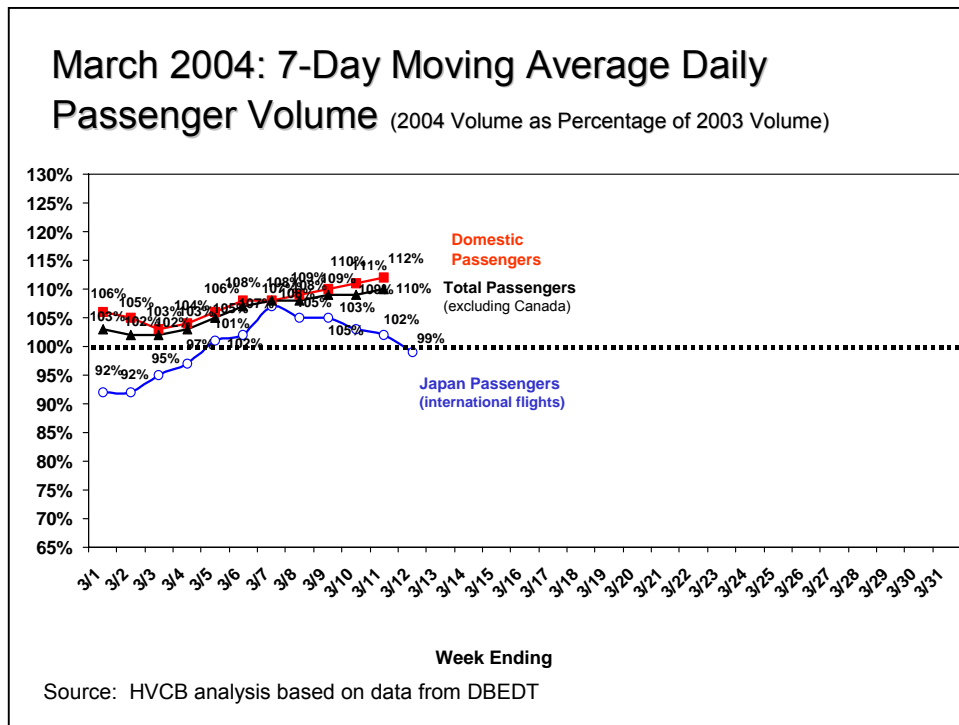
- **2004 NFL Pro Bowl Visitors Account for \$29.5 Million in Visitor Spending**
 - Out-of-state visitor attendance and spending increased at this year's NFL Pro Bowl, according to a recent study released by the [Hawai'i Tourism Authority](#) (HTA). The study, conducted by Market Trends Pacific for HTA, surveyed 420 visitors at the 2004 Pro Bowl:
 - Attendance at the 2004 Pro Bowl game totaled 49,000, a 22 percent increase over the attendance in 2003. According to the survey, approximately 30,000 of all attendees were out-of-state visitors, with 22,000 coming specifically for the Pro Bowl.
 - Visitors who came to Hawai'i particularly for the game accounted for \$29.5 million in visitor spending; and \$2.84 million in state taxes.
 - Pro Bowl visitor spending also had an effect on the Neighbor Islands, with 42 percent stating they planned to visit another island - up from 33 percent last year:
 - 72 percent planned to visit Maui
 - 40 percent planned to visit Kaua'i
 - 37 percent planned to visit the Big Island
 - 10 percent planned to visit Moloka'i
 - Eight percent planned to visit Lāna'i

- Seventy-nine percent of Pro Bowl visitors planned to participate in other activities (i.e. golf, tennis, biking, swimming) during their stay in Hawai'i, and 82 percent visited or planned to visit an attraction.

Hawai'i

▪ CONSUMER TRAVEL BEHAVIORS

- **Domestic Passenger Volume Up 12 Percent Over 2003 Levels for Seven-Day Period** - According to statistics published by the state [Department of Business, Economic Development and Tourism](#), domestic passenger volume was up 12 percent over last year's figures for the seven day period ending March 11, 2004. Total domestic and international (excluding Canada) volume continued to perform above 2003 levels, up 10 percent over last year's numbers, while nonstop passengers from Japan arriving in Hawai'i inched down to 99 percent of 2003 levels for the seven-day period.



- **Honolulu: Best City in the West for Walking and Fitness** - According to a study commissioned by *Prevention* magazine and the [American Podiatric Medical Association](#), Honolulu ranks as the top urban area in the west for walking and fitness. Honolulu also made the national list of "12 Best Walking Cities for 2004," ranking tenth overall. The study surveyed 125 of the most populated cities in the nation against 20 criteria, including use of mass transit; amount of exercise; number of museums; annual attendance at museums; number of historic sites and landmarks; annual rainfall levels; and crime rate. Results will be published in the April issue of *Prevention*.

▪ CURRENT INDUSTRY DEVELOPMENTS

- **HVCB Wins Four HSMIA 2003 Adrian Awards for Advertising, PR** - The Hospitality Sales & Marketing Association International (HSMIA) awarded the [HVCB](#) with four 2003 Adrian Awards, recognizing excellence in travel advertising and public relations. HVCB's advertising agency, Milici Valenti Ng Pack, won a Silver Award for the "Complete Campaign" category; a Silver Award in "Advertising Series" for its television campaign; and a Bronze Award for "Small Space Print Ads." HVCB's public relations firm, McNeil Wilson Communications, won a Bronze Award in the "Destination Consumer Marketing" category.

- **Statewide Visitor Units Up Marginally in 2003** - The 2003 Visitor Plant Inventory report released by the [Department of Business, Economic Development, and Tourism](#) (DBEDT) shows that statewide visitor units increased 0.3 percent to 70,977 units in 2003 compared to the previous year. Maui County registered the largest growth in visitor units (+3.3%), followed by Kaua'i (+3.1%) and the Big Island (+1.9%). O'ahu visitor units fell 2.2 percent to 35,664, largely due to many hotel properties converting to condominiums or apartments for residential use. However, O'ahu visitor units still represented over half of the total statewide visitor plant inventory.
- **Hawai'i's Economy Expands for Seventh Straight Year** - According to the [University of Hawai'i Economic Research Organization](#) (UHERO), 2003 marked the seventh straight year of economic expansion for the state, measured by growth in real personal income. Employment increased by 1.9 percent, reaching 572,400 in December, and is expected to rise by another 1.8 percent in 2004. Jobs in tourism related areas continued to increase, reaching pre-9/11 levels by the end of 2003. UH economists also expect continued economic expansion in 2004, especially with the recovery of Japan's economy, which should spur significant visitor arrival growth.

National and International

■ CONSUMER TRAVEL BEHAVIORS

- **J.D. Power and Associates Release Study on Air Passenger Priorities** - The Global Airport Satisfaction Study conducted by J.D. Power and Associates reveals that air passengers have changed their expectations and behaviors since 9/11, according to *Travel Weekly*. Of the 12,000 travelers that were surveyed at 61 international airports, most were concerned about the possibility of long security lines, and arrived the airport earlier than in past years. Air passengers were also more likely to be sensitive to airport and security staff courtesy and professionalism, with the level of interaction between consumers and airport personnel increasing post-9/11.
- **German Tourism Official Expects Growth in Long Distance Travel in 2004; U.S. to Benefit** - In the opening press conference of the [International Tourism Exchange](#) (ITB) trade show in Berlin, Klaus Laepple, president of the German Travel Agency and Tour Operator Association, proclaimed 2004 as the year for long distance travel from Germany. Exotic destinations like U.S., the Caribbean, Canada and Mexico would be particularly popular in 2004. Because of the strong Euro, catalog prices to these destinations have essentially been reduced 20 percent, a major reason for the outbound travel turnaround in Germany, according to Laepple.

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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 Darlene Morikawa via email at: dmorikawa@hvcb.org