



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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Feature

- **YPB&R: U.S. Leisure Travelers Increasingly Interested in Hawai'i**
 - The 2004 National Leisure Travel MONITOR, a survey conducted by YPB&R/Yankelovich Partners, indicates that 21 percent of active leisure travelers are interested in visiting Hawai'i within the next two years, a five percentage point increase over 2003 figures. The five-point increase represents the largest year-over-year state destination improvement in the poll.
 - The Hawaiian "Outer" Islands, as it is stated in the poll, continued to be the most popular city or area destination in the poll, while Honolulu ranked third.

"Where People Want to Go" In the Next Two Years

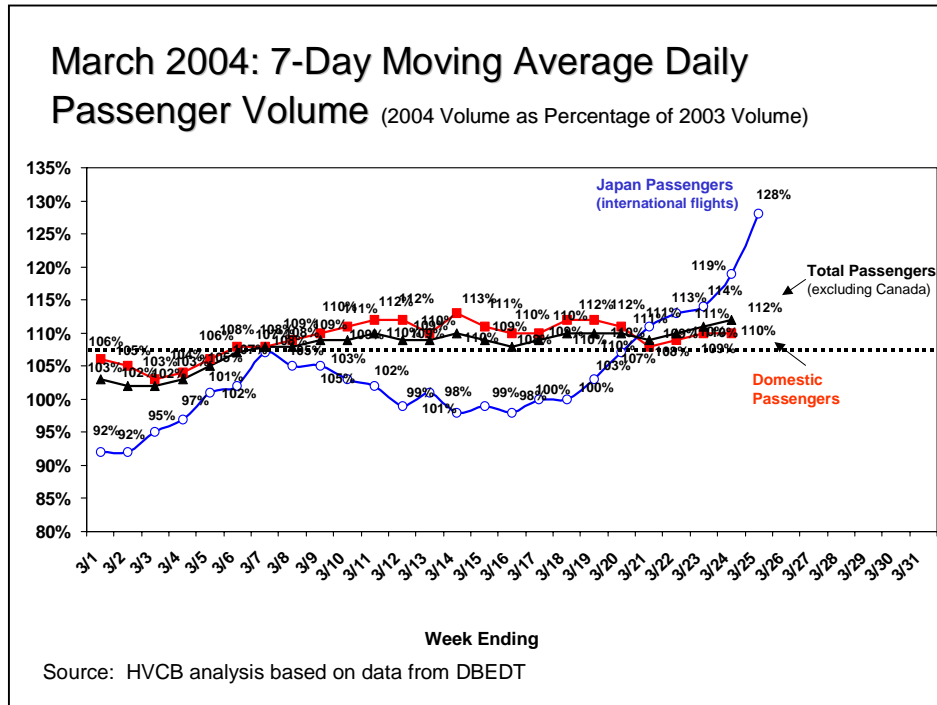
Area/Region	2003	2004	% Point Change
Florida	38%	39%	+1
California	34%	36%	+2
Hawai'i	16%	21%	+5
New York	17%	18%	+1
Colorado	17%	16%	-1
Nevada	13%	16%	+3
Arizona	17%	15%	-2
Alaska	12%	14%	+2
Washington	11%	12%	+1
Texas	11%	12%	+1

Source: YPB&R/Yankelovich Partners
2004 National Leisure Travel MONITOR

Hawai'i

CONSUMER TRAVEL BEHAVIORS

- **Japanese Passenger Volume Continues to Rise Over 2003 Levels for Seven-Day Period** - According to statistics published by the state [Department of Business, Economic Development and Tourism](#), nonstop passengers from Japan arriving in Hawai'i moved even further ahead of last year's figures, up 28 percent for the seven day period ending March 25, 2004. This increase is due, in part, to the sharp fall-off in Japanese travel last year with the start of the War in Iraq, which began March 20, 2003, along with the emergence of SARS. Total domestic and international (excluding Canada) volume also continued to perform above 2003 levels, up 12 percent over last year's figures, while total domestic passenger volume continued to be above prior-year levels at 110 percent of 2003 levels for the seven-day period.



- **Domestic Arrivals to Hawai'i Reach February Record** - Domestic visitor arrivals to Hawai'i totaled 366,088 in February, up 11.4 percent over the same month last year, and reaching an all-time record high for the month of February, according to the state [Department of Business, Economic Development and Tourism](#). The record month was helped by the estimated 22,000 visitors to this year's NFL Pro Bowl game, and meetings and conferences like the CISCO Partner Summit Conference during the month. Other highlights from February 2004:
 - The number of U.S. West visitors equaled 190,161, an increase of 11.1 percent
 - U.S. East arrivals increased 9.7 percent over February 2003 figures, totaling 151,486
 - Canadian visitation was off slightly (-0.5%) for the month, totaling 31,919
 - Japanese arrivals decreased 3.8 percent to equal 115,855 in February 2004
- **T+L Magazine/AOL Travel Rank Honolulu Among 'America's Favorite Cities'** - In its third annual online survey of "America's Favorite Cities," [Travel + Leisure](#) magazine and America Online ranked Honolulu at the top of many categories: best people; most romantic; best holidays and seasons; best quality of life; and best honeymoon/anniversary destination. The poll of nearly 500,000 AOL users surveyed travelers and city residents alike on the top attributes of 25 major U.S. cities. Honolulu also ranked within the top ten of several other categories, including best activities; ease of getting around; and best parks.

National and International

▪ CONSUMER TRAVEL BEHAVIORS

- **FAA Forecast: Total Air Traffic to Reach 1.06 Billion by 2015** - According to the [Federal Aviation Administration's](#) 12-year forecast of aviation activity, total worldwide air carrier and regional/commuter traffic is projected to increase from 641.4 million in 2003 to 1.06 billion by 2015, averaging 4.3 percent annual growth. U.S. domestic enplanements should reach pre-9/11 levels by 2005, with an average annual growth rate of 4.2 percent through 2015. International traffic is projected to recover to pre-9/11 levels by the end of this year, and increase an average of 5.2 percent through the 12-year forecast period.
- **ASTA Travel Agent Survey: Bookings, Revenue Increase in January, February** - A survey of 300-plus [American Society of Travel Agents](#) (ASTA) members, and Carlson Wagonlit and Uniglobe travel agents indicates that travel agent bookings and revenue increased in January and February 2004. When compared to the same two months in 2003, 81.4 percent of respondents stated that bookings were up in January and February, compared to 7.5 percent stating that bookings were down. Nearly 78 percent of agents also indicated that revenue generated in January and February 2004 is up, while only 9.3 percent said that revenue is down compared to the same period last year. The survey also included information on travel agent leisure destination bookings and honeymoon bookings during the first two months of 2004:
 - Hawai'i ranked third overall in land-based packages in 2004 (18.7%), behind only Mexico (27.2%) and the Caribbean (26.9%).
 - Hawai'i ranked second overall in 2004 honeymoon bookings (32.9%), behind only bookings to the Caribbean (46.1%).

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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