



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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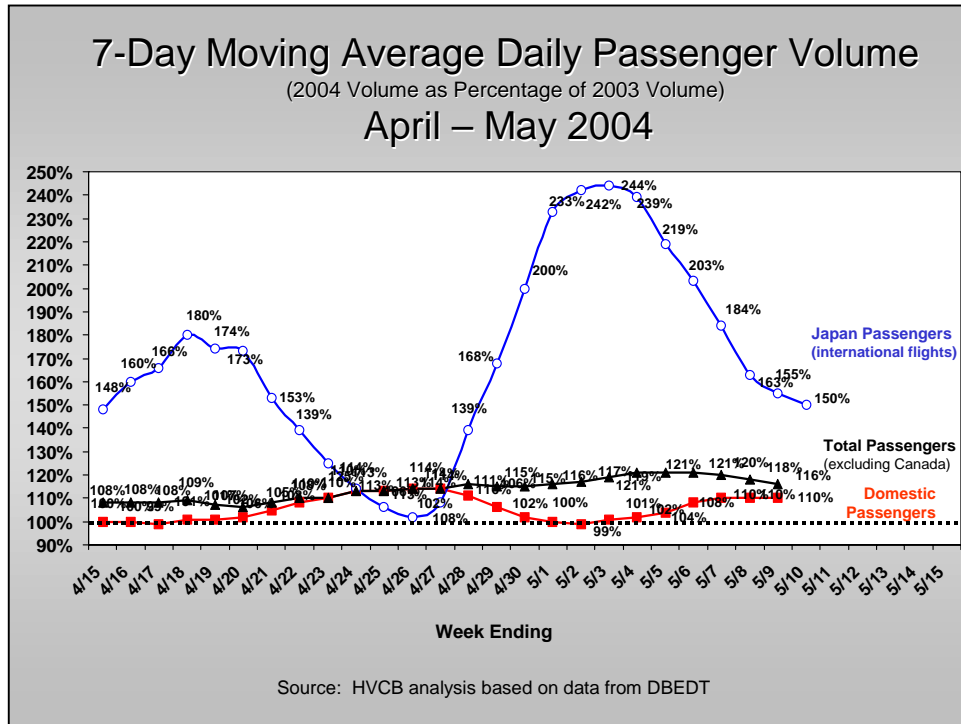
Feature

- **HVCB to Present Mid-Year Marketing Update at Public Meeting**
 - The Hawai'i Visitors and Convention Bureau will present an update on its 2004 marketing plan for the North America leisure and global Corporate Meetings and Incentives markets and will include the screening of two new television commercials – one showcasing active vacations and the other focusing on arts and culture.
 - Other [Hawai'i Tourism Authority](#) marketing contractors will also present updates for Japan, Europe, Other Asia, Oceania, and the Hawai'i Convention Center, at HTA's mid-year meeting.
 - When: May 12, 2004; 3:00 pm to 5:00 pm
 - Where: Hawai'i Convention Center; Emalani Theater (3rd Floor)
 - For more information, contact the HTA: (808) 973-2273
 - Presentations will be available online later in the week at www.hawaii.gov/tourism.

Hawai'i

CONSUMER TRAVEL BEHAVIORS

- Total Passenger Volume to Hawai'i Up 16 Percent for Latest Seven-Day Period - According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic and international (excluding Canada) volume on nonstop flights arriving in Hawai'i was up 16 percent for the latest seven-day period ending May 9, 2004. Nonstop passenger volume from Japan remained well above 2003 levels for the seven-day period, ending Japan's *Golden Week* holiday travel period 50 percent over 2003 volume. Travel during *Golden Week* in 2003 was negatively impacted by the War in Iraq and the SARS epidemic, especially affecting the Japanese outbound travel market. Domestic passenger volume for the seven-day period was up 10 percent over 2003 levels.



CURRENT INDUSTRY DEVELOPMENTS

- HVCB's "Sharing Aloha" Program Helps Nonprofits Promote Activities Outside of Hawai'i - [HVCB](#) is inviting nonprofit organizations statewide to take advantage of "Sharing Aloha," a free program that allows them to share Hawai'i's spirit of aloha when traveling abroad. "Sharing Aloha" is an online program sponsored by the Hawai'i Tourism Authority, and operated by HVCB as a public service to help nonprofits promote Hawai'i-inspired activities overseas. Participants will also have the opportunity to receive promotional gift items for goodwill exchanges while abroad. For more information on the "Sharing Aloha" program, visit www.sharingaloha.com.
- HVCB, HCC and Industry Partners Participate in *Springtime 2004* Association Tradeshow - [HVCB](#), joined by the Hawai'i Convention Center and 14 other travel industry partners, will continue its drive to attract more meetings business by attending "Springtime 2004" the nation's largest and most important one-day associations tradeshow. The show, which takes place on May 13, 2004 in Washington D.C., is considered one of the best opportunities to reach decision-makers in the world's biggest market for association meetings. HVCB is organizing a special Hawai'i-themed section to help interest the 4,500 meeting and association professionals expected to attend. HVCB's leads for association meetings have become its top business sector in 2004, surpassing incentives.

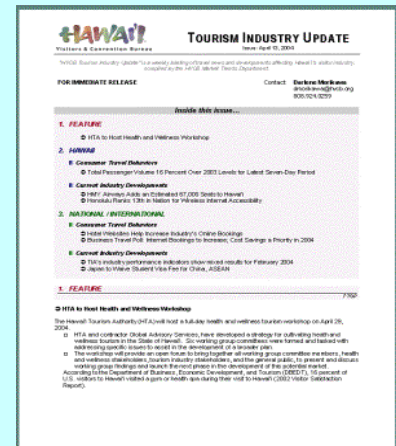
National and International

CONSUMER TRAVEL BEHAVIORS

- **TIA's Industry Performance Indicators Show Strength in March 2004** - According to the [Travel Industry Association of America](#) (TIA) Industry Performance Indicators (IPI) for March 2004, domestic air revenue passenger miles (RPMs) increased 8.6 percent compared to the same month last year, while international air RPMs jumped 16.7 percent, representing the largest year-over-year increase since November 2002. Hotel/motel room demand was also strong in March, up 7.6 percent compared to March 2003.
- **International Travel to the U.S. Projected to Reach 49.3 Million in 2007** - [The Office of Travel and Tourism Industries \(OTTI\)](#) of the U.S. Department of Commerce projects that international arrivals to the U.S. will reach 49.3 million in 2007, an increase of 22 percent over 2003 figures, according to their revised forecast for international travel to the U.S. released at this year's International Pow Wow. Total international arrivals to the U.S. are forecast to increase five percent in 2004 (versus 2003), reaching 42.5 million arrivals.
 - The Japanese market is expected to grow to 4.2 million arrivals in 2007, up 32 percent over 2003 arrivals, and maintain its position as the second largest overseas market to the U.S.
 - The United Kingdom is projected to maintain its top spot as the top overseas market to the U.S. (not including Canada and Mexico) with 5.1 million arrivals in 2007, an increase of 30 percent from 2003.
- **Visitor Market Share to U.S. Historical Sites and Parks Reach Ten-Year Low** - Despite the record high in total U.S. leisure travel in 2003, the share of leisure travel parties visiting historical sites and National or State parks reached a 10-year low, according to D.K. Shifflet and Associates Ltd. Market share of all leisure visits to National and State parks was 6.4 percent in 2003, down 2.6 points from the record high of 9.0 percent share experienced in 1995. Visitation to historical sites fell even further in market share, declining from 10.6 percent in 1995 to 5.6 percent in 2003, according to the study.
 - However, the Travel Industry Association's recently released "[National Parks Traveler Report](#)" shows that U.S. National Parks are experiencing high awareness and satisfaction among U.S. travelers. In 2002, 87 million leisure person-trips included a National or State park, and 93 percent were highly satisfied with their park experience. In addition, 82 percent of U.S. travelers are aware that U.S. National Parks can also include historic sites, battlefields, seashores, or parkways, according to the study.

Special Announcement

Over the next few weeks, *HVCB's Tourism Industry Update* will undergo a facelift. The new edition will report the same type of information and provide a similar outline, but will be enhanced with more features and don a more user-friendly look (see example below). Look for the new edition to debut at the end of this month.



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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