

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

FOR IMMEDIATE RELEASE

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1. FEATURE

➤ Survey: 10.1 Million People Visited Hawai'i State Parks in 2007

The [Hawai'i Tourism Authority](#) (HTA) released the findings of the *2007 Hawai'i State Parks Survey*¹, a study of 55 highly visited Hawai'i state-owned parks, conducted by the OmniTrack Group. An estimated 10.1 million people visited Hawai'i state parks in 2007, an increase of 10 percent from 2003 (the last time the study was conducted). Of this total, two-thirds (6.7 million) were out-of-state visitors. Other findings of the survey include:

- Overall satisfaction with the parks increased four percent (from the 2003 study), including a five percent increase in satisfaction of historical and cultural sites.
- 97 percent of park users are likely to recommend visiting Hawai'i state parks to others (+19% from 2003).
- The top five most visited state parks by out-of-state visitors include: Wailua River State Park (808,000 out-of-state users); Nu'uuanu Pali State Wayside (697,100); Ha'ena State Park (637,600); Diamond Head State Monument (558,200); and Na Pali Coast State Park (368,100).
- Among all out-of-state visitors to Hawaii's park system, 86 percent were from North America, while five percent came from Japan.

¹ The Hawai'i State Parks Survey was conducted from July 2007 through October 2007, and included random visits at a sampling of parks during various times throughout the day, in-person observations and counts, and the distribution and collection of 7,700 written surveys. The objectives of the study were to establish the number of park visitors, identify the composition of park users, and evaluate their behavior and attitudes as they relate to satisfaction with the parks and amenities. The full report may be viewed on [HTA's website](#).

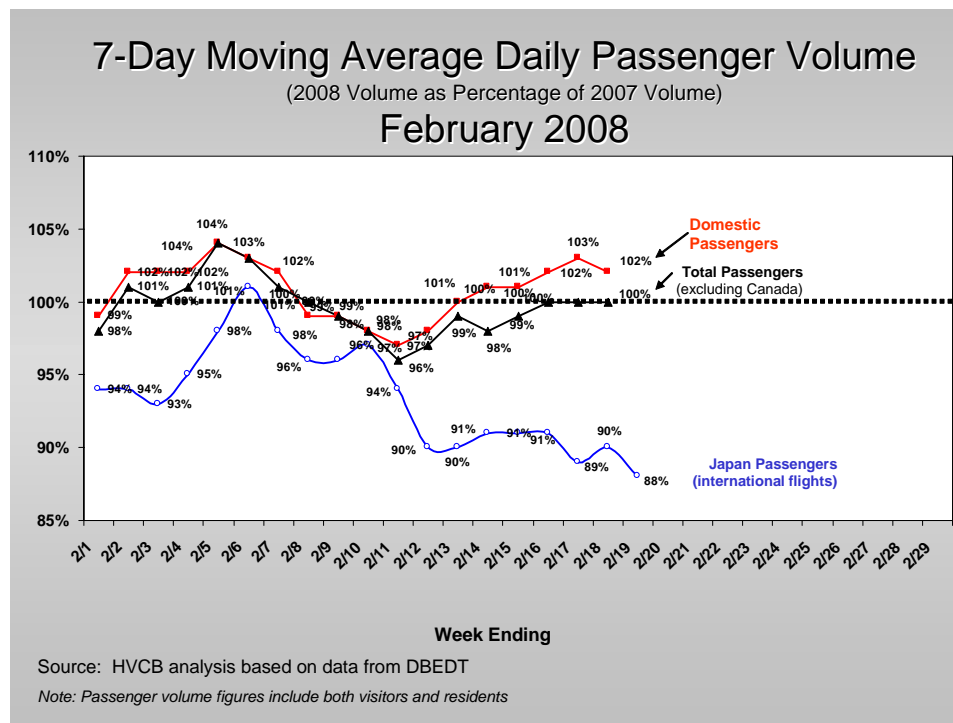
2. HAWAI'I

■ CONSUMER TRAVEL BEHAVIORS

➤ Total Passenger Volume to Hawai'i on Par with Prior Year Levels for the Week

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic and international (excluding Canada) passenger volume on nonstop flights to Hawai'i was on par with prior-year levels for the seven-day period ending February 19, 2008. Total domestic passenger volume ended the period up two points, while nonstop passenger volume from Japan fell 12 points for the week.

For the most recent Seven Day Moving Average chart, visit HVCB's Market Trends Online: <http://www.hvcb.org/trends>



3. NATIONAL / INTERNATIONAL

■ CONSUMER TRAVEL BEHAVIORS

➤ International Air Passenger Demand Up 7.4 Percent Worldwide in 2007

International air passenger traffic was up 7.4 percent in 2007 (compared to 2006), up considerably from the 5.9 percent increase set in 2006, according to [International Air Transport Association](#) (IATA) traffic figures². Average international passenger load factors reached an industry-record 77.0 percent, up from 76.0 percent in 2006. Passenger growth increased considerably in developing regions of the world (i.e. the Middle East, Latin America, and Africa), while growth the Asia-Pacific region (+7.3%) mirrored the international average. Growth in North America (+5.5%) and Europe (+6.0%) remained steady. Despite the strong growth in global air passengers last year, IATA projects that 2008 growth will slow to about five percent (with a capacity increase of 5.2%), mainly due to record high oil prices, economic uncertainty, and the U.S. credit crunch.

² IATA represents 240 airlines comprising 94 percent of international scheduled air traffic. Statistics cover international scheduled air traffic – domestic traffic is not included.

■ CURRENT INDUSTRY DEVELOPMENTS

➤ Nation's Tourism Industry Performance Indicators Up in 2007

The [Travel Industry Association's](#) (TIA) Industry Performance Indicators (IPI) through December 2007 revealed that year-end international air revenue passenger miles (RPMs) increased 5.9 percent, while domestic air RPMs have increased 0.5 percent compared to 2006. TIA also reports that domestic air load factor improved by 1.1 percentage points in 2007 versus prior-year levels. Room demand (+1.2%) and room revenue (+7.2%) both rose in 2007, despite a nominal decrease in occupancy (-0.2%). The IPI is released by TIA each month to give a monthly snapshot of recent trends in the travel industry.

➤ California to Launch First Major Tourism Campaign in Japan

The California Travel and Tourism Commission (CTTC) is scheduled to launch its first major consumer advertising campaign in Japan this year, according to *Travel Journal International*. The campaign, guided by AVIAREPS Marketing Garden Ltd., is scheduled to run for seven years, and is aimed at gaining a bigger share of the long-haul market from Japan. The campaign incorporates a blend of research, brand advertising, online activities, consumer and travel trade advertising, and publicity, with the goal of freshening the brand image of California in Japan. The CTTC will target specific markets, including women in their 20s, travelers in their early 30s, and baby-boomers. Promotions will be centered around 10 experimental themes – spas and “lifestyles of health and sustainability,” sports, wine and cuisine, theme parks and attractions, outdoors (including national parks and World Heritage sites), luxury, entertainment and nightlife, shopping, culture, and fly and drive. The campaign is scheduled to kick off on April 5, 2008, just before Golden Week.

We welcome any suggestions or comments that you may have that will help us improve the quality of the Tourism Industry Update. Please feel free to share your ideas:

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