



## 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***

- **TIA: National Traveler Sentiment Index Dips in the Second Quarter**
  - The Travel Industry Association's (TIA) overall [Traveler Sentiment Index](#) (TSI) decreased 4.8 points in the second quarter 2004, compared to the previous quarter, suggesting that the affordability of travel with rising fuel prices has dampened on Americans' interest to travel.
    - The overall Index fell to 97.4, down from a very optimistic first quarter reading of 102.2 (Base Year 2000 = 100).
    - Among the five index components, the affordability index fell 18.3 percent to its lowest level since the first quarter in 2001.
    - However, the index measuring consumers' general interest in leisure travel rose significantly, as did the "quality of service received while traveling" index.
    - TIA notes that interest in leisure travel remains high and that overall traveler sentiment is still higher than it was in all of 2003.
  - *TIA's quarterly Traveler Sentiment Index is a running gauge of consumers' interest in leisure travel and their perceived ability to travel, consisting of five criteria: interest; time; finances; affordability; and service quality.*



▪ **CURRENT INDUSTRY DEVELOPMENTS**

- **TSA to Monitor Honolulu Airport Lines This Summer** - Honolulu International Airport (HNL) is among the nation's 25 busiest airports that will be monitored by the Transportation Security Administration (TSA) this summer, according to the [Honolulu Advertiser](#). In particular, the TSA will supervise and monitor the airports' security lines to minimize security delays and wait time for travelers. Extra TSA screeners and baggage handlers may be deployed to airports needing more support, as this summer is projected to be one of the busiest travel seasons since the 9/11 attacks.
- **NBC Network Approves "Hawaii" Police Drama Series** - The NBC network has approved 12 one-hour-long episodes of "Hawaii," a police drama scheduled to begin filming on O'ahu on July 12, according to the [Honolulu Star Bulletin](#). Along with the FOX network's filming of 12 episodes of the hotel drama, "North Shore," filming for "Hawaii" will mark the first time since 1998, that two network series will be filming in the Islands at the same time. If the series' ratings are high enough, they may be picked up for another nine episodes.
- **AAA: Hawai'i Travel Costs Down \$36 Per Day; Remains Most Expensive State for Travel** - Despite Hawai'i ranking as the most expensive state for vacationers (estimated at \$497 per day), the daily cost of staying in the Islands is down nearly seven percent (down \$36 per day) from 2003, according to AAA's annual [Vacation Cost Survey](#). Nationwide lodging and dining costs are estimated to be four percent lower this year versus 2003, offsetting record-high fuel prices. Driving to vacation destinations, in general, will be more expensive this year, as nationwide gas prices have soared 29 percent compared to a year ago, according to the report.
- **Passengers on Japanese Charter Flights to Honolulu Grows 220 Percent in 2003** - The number of passengers on Japanese charter flights to Honolulu totaled 31,843 in FY 2003, up 220 percent from FY 2002, according to the Japan Ministry of Land, Infrastructure and Transport (MLIT) and reported by *Travel Journal International*. The number of Japanese charter flights to Honolulu totaled 113 in FY 2003, surging 130 percent over the same period in 2002. Honolulu ranked second (after Seoul, Korea) in total passengers on Japanese charter flights, and ranked fourth overall in total number of outbound Japanese charter flights.

## ***National and International***

▪ **CONSUMER TRAVEL BEHAVIORS**

- **Study: "Gen X'ers" Fast Becoming Top Market for Travel and Lodging Industry** - Although Generation X (people born between 1965-1980) makes up only 29 percent of the U.S. population over the age of 18, the "much-maligned" Generation X traveler is expected to make a great impact on the travel and lodging industry, according to a study conducted by D.K. Shifflet & Associates Ltd. While all other generations decreased in total travel room nights since 2001, the growth in "Gen X" travelers' room nights helped boost industry growth. "Gen X" travelers made up two-thirds (65.9%) of the 49 million added leisure hotel room-night increases since 2001, according to the study. "Gen X" was also the only generation to post increases in business room-nights since 2001, up 3.8 percent. Although the Baby Boom Generation (born 1946-1964) continues to generate the most room nights, "Gen X'ers" are steadily catching up in market share, and becoming the driving force for the industry.
- **Working Professionals Regret Not Taking Enough Time Off for Vacations** - A survey of 571 working professionals conducted by OfficeTeam, an international staffing service for skilled administrative professionals, shows that the biggest regret on respondents' last vacation from the office was "not taking enough time off of work" (43% of respondents), according to [PR Newswire](#). Another 17 percent of respondents said that the biggest regret was "not being able to relax or get their mind off of work." OfficeTeam suggests that many professionals are fearful of falling behind on projects, and are limiting their vacations to long weekends.

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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](mailto:dmorikawa@hvcb.org)*