

"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.

**FOR IMMEDIATE RELEASE**

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### 1. FEATURE

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#### ➤ YPB&R: U.S. Travelers Undeterred by Heightened Terror Alert

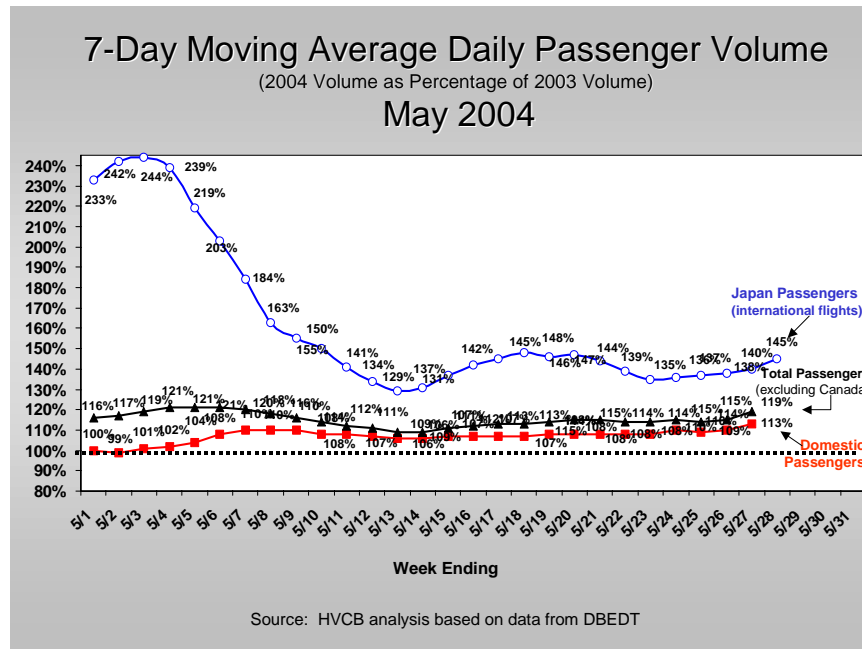
A national poll of over 800 active travelers conducted last week by [Yesawich, Pepperdine, Brown & Russell \(YPB&R\)](#) indicates that most U.S. travelers will continue on with their summer travel plans despite military action in Iraq and the heightened terror alert issued by the U.S. Attorney General's Office:

- 72 percent of leisure travel respondents stated that the current situation in Iraq would not affect their summer plans, while only 13 percent said it would greatly affect their plans.
- 62 percent of respondents indicated that the possibility of major terrorist attacks in the U.S. would not affect their summer plans. One-fifth of respondents felt that potential terrorist attacks in the U.S. would greatly affect their summer travel plans.
- Most respondents (56%) said they were more likely to vacation within the U.S. because of current world events, with 58 percent stating that they were less likely to vacation outside of the U.S. this summer.
- 63 percent believed that Americans traveling overseas would be greeted less positively as a result of U.S. military action in Iraq.

■ CONSUMER TRAVEL BEHAVIORS

➤ Domestic Passengers Up 13 Percent for Latest Seven-Day Period

According to statistics published by the state [Department of Business, Economic Development and Tourism](#), total domestic passenger volume rose to 13 percent above prior-year levels for the seven-day period ending May 27, 2004. Total volume of nonstop passengers from Japan continued to perform well above 2003 levels, up 45 percent over last year's figures, pushing total domestic and international (excluding Canada) passengers on nonstop flights to Hawai'i to 19 percent over 2003 figures for the seven-day period.



➤ Domestic Arrivals to Hawai'i Set Another Record in April

Domestic visitor air arrivals to Hawai'i totaled 405,833 in April 2004, an increase of 8.1 percent over the same month in 2003, setting another month-over-month record, according to the state [Department of Business, Economic Development and Tourism](#) (DBEDT). The "best April on record" for domestic travel was driven by arrivals from the U.S. West (+8.0%) and U.S. East (+5.1%). Total visitor air arrivals (domestic and international) reached 548,599 in April, an increase of 14.4% over the same month last year.

■ CURRENT INDUSTRY DEVELOPMENTS

➤ Dr. Beach Ranks Hanauma Bay as Nation's Top Beach

O'ahu's own Hanauma Bay earned the number one spot on Dr. Stephen Leatherman's (known as "Dr. Beach") annual "America's Best Beaches" list, according to [USA Today](#). "Dr. Beach," a professor of environmental sciences and director of Florida International University's Laboratory for Coastal Research, visits beaches nationwide and ranks each on 50 different criteria, including sand and water quality, water temperature, litter levels, and amenities. Kauai's Hanalei Bay also made this year's top 10 list, ranking sixth overall. Once a beach wins the top spot, it is "retired" and excluded from future "top beach" consideration. Since 1991, ten Hawai'i beaches have earned the top spot on Dr. Beach's list.

## ➤ HVCB Earns Fourteenth Consecutive Pinnacle Award

For the fourteenth straight year, [HVCB](#) received a Pinnacle Award (awarded by *Successful Meetings* magazine) – more consecutive awards than any other destination. This year, HVCB earned the award for its outstanding job of servicing meetings, incentive travel programs, trade shows, and conventions for the past year. According to *Successful Meetings*, the Pinnacle Award has earned the reputation as being one of the most credible and prestigious symbols of excellence among meeting planners and hoteliers, and “meeting planners searching for the best sites for their meetings often consider the Pinnacle Award winners first.”

### 3. NATIONAL / INTERNATIONAL

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#### ■ CONSUMER TRAVEL BEHAVIORS

##### ➤ Consumer Poll: Three out of Four Americans Plan to Travel This Summer

Seventy-five percent (75%) of Americans are planning to travel this summer, according to a summer U.S. travel forecast poll conducted by Harris Interactive for [Yahoo! Travel](#).

Other results from the poll:

- 14 percent of respondents are still undecided on how or where they will vacation this summer
- 29 percent plan to spend their vacation visiting family and friends; 21 percent plan to vacation at the beach.
- Most Americans plan to visit more than one destination; 61 percent plan to return to a place they had visited previously; 41 percent say they are likely to try a new destination.
- Americans plan to spend an average of \$1,756 per household on vacations this summer (including transportation, accommodations, food expenses and entertainment).

#### Market Trends Online

HVCB invites you to visit Market Trends Online, your one-stop source for the latest in HVCB's market research and analysis. To view HVCB reports, presentations and links to other important resources, visit:

<http://www.hvcb.org/trends>

##### ➤ Survey Documents "Vacation Deprivation" Mindset of Working Americans

A study on working Americans' travel habits, conducted by Harris Interactive for [Expedia.com](#), indicates that the nation's employed are "Vacation Deprived," as 30 percent of employed adults will give up vacation time they have earned -- a total of 415 million vacation days in 2004. Employed Americans will give up an average of three vacation days this year, up 50 percent from 2003. Furthermore, one-third of respondents stated that they check office voicemail or e-mail during their holiday, suggesting that "working vacations" are becoming standard. Survey respondents agree that vacation time is an important priority in life, with 65 percent saying they come back feeling "rested, rejuvenated, and reconnected with family and friends," and 52 percent stating that they return feeling better about their jobs and are more productive at work.

##### ➤ IATA: International Air Passenger Traffic Up Through April, Despite Rising Fuel Prices

International air passenger traffic for the first four months of the year is up 15.4 percent compared to the same period in 2003, according to preliminary International Air Transport Association (IATA) traffic figures for January-April 2004. Improvement was seen in each of the world regions, including the Asia-Pacific (+15.6%), and North America (+15.5%) for the first four months of 2004, compared to the same period last year. When compared to pre-9/11 figures, total international air passenger traffic for the four-month period is up 8.5 percent this year over January-April 2000.

## ■ CURRENT INDUSTRY DEVELOPMENTS

### ➔ Conference Board: National Consumer Confidence Index Up Slightly in May

After improving in April, the [National Consumer Confidence](#) Index held steady in May, up 0.2 points from the last month to 93.2 (1985=100), according to the Conference Board. The "Present Situation" index was down slightly at 90.3 (from 90.4 in April), while the "Expectations" index inched up 0.4 points to 95.2 in May. Conference Board officials state that the positive outlook on the job market is offsetting the impact of rising fuel prices and rising tensions overseas.

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

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