

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

**FOR IMMEDIATE RELEASE**

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### 1. FEATURES

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#### ⇒ Affluent U.S. Travel Consumers Frequently Use Search Engines for Travel Information

Over three-fourths (76.3%) of affluent U.S. consumers (annual incomes of \$100,000 or greater) use Internet search engines when looking for travel information, according to an [eMarketer](#) report on a Thomas, Townsend & Kent study. The study shows that search engines rank significantly higher than travel magazines (46.7%), referrals (41.7%), travel agents (35.2%), and e-newsletters (24.8%) as travel information resources for the national affluent market. When booking online, 51.0 percent of affluent travelers used a travel provider's website, while 48.2 percent booked on a third-party travel site (e.g. Expedia, Orbitz), and 29.2 percent used a traditional travel agent.

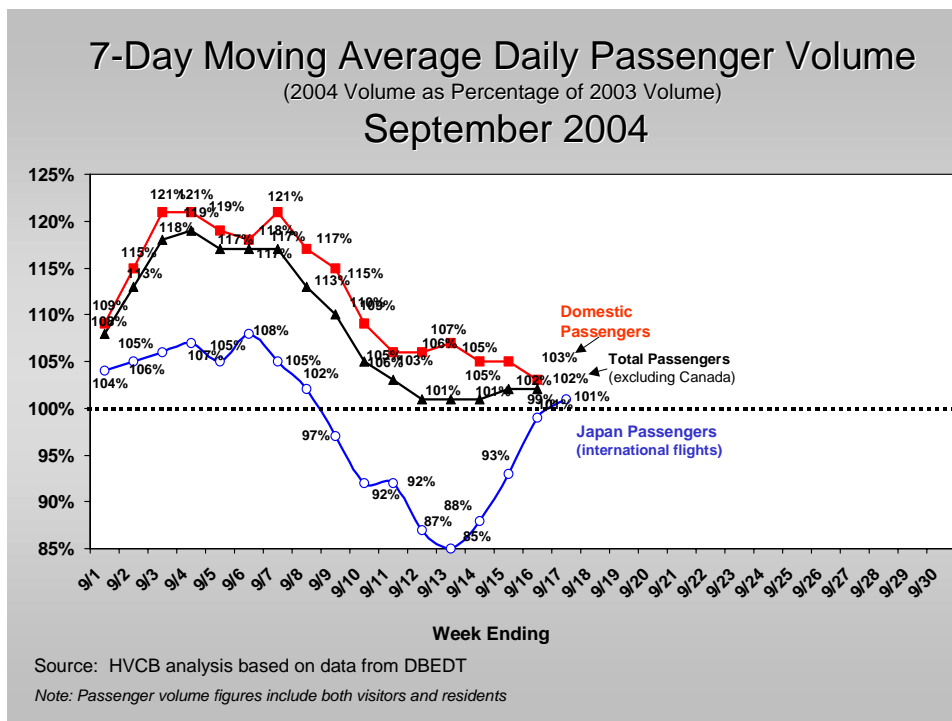
#### ⇒ Affluent U.S. Travel Consumers Interested in Visiting Maui

Forty percent of affluent leisure travelers (annual household incomes of \$150,000, or the top six percent of all U.S. households) indicated that they were interested in visiting Maui, according to the "Portrait of Affluent Travelers" study conducted by [Yesawich, Pepperdine, Brown and Russell](#) (YPB&R). *The Magic Isle* tied with San Francisco as the second most desirable domestic destination for affluent U.S. travel consumers, following number one-ranked New York City (45%). As for international destinations, Europe (82%) generated the most interest among this market, followed by the Caribbean (17%) and Mexico (16%).

## CONSUMER TRAVEL BEHAVIORS

### ☛ Total Passenger Volume to Hawai'i Up Two 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 increased two percent over 2003 levels for the latest seven-day period ending September 16, 2004. Nonstop passenger volume from Japan reached 101 percent of 2003 levels, while domestic passenger volume on nonstop flights to Hawai'i was up three percent over 2003 levels for the seven-day period. *For the most recent Seven Day Moving Average chart, visit HVCB's Market Trends Online: <http://www.hvcb.org/trends>*



## CURRENT INDUSTRY DEVELOPMENTS

### ☛ HTA Releases Results of Natural Resources Assessment

The [Hawai'i Tourism Authority](#) (HTA) released the results of the National Resources Assessment, an in-depth inventory of Hawai'i's most visited environmental sites. The assessment provides a strategic plan for the expenditure of HTA's Tourism Special Fund, mandated for improving frequently visited natural resource sites. The assessment finds that the quality of the visitor experience may be negatively affected by such factors as aging facilities, deferred maintenance, vandalism, and parking problems. Of the 110 sites evaluated, 23 were given priority status. Honolulu-based planning firm, PBR Hawai'i, prepared a strategic plan for each of the sites.

### HTA to Post 2005 Annual Tourism Marketing Plan Presentations Online

The Hawai'i Tourism Authority will post the 2005 marketing plan presentations for North America, Japan, Asia, Europe, Oceania, the Hawai'i Convention Center, and Corporate Meetings and Incentives (CMI) on its website this week. The plans were presented last week during HTA's Tourism Conference and at public meetings held around the state:

<http://www.hawaii.gov/tourism>

HVCB's 2005 marketing plan presentation for North America leisure and global CMI is now available to view on HVCB's corporate website:

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

#### ■ CURRENT INDUSTRY DEVELOPMENTS

##### ☛ National RevPAR Projected to Experience Largest Increase in 20 Years

PricewaterhouseCoopers projects that the nation's hotel industry will experience a 6.3 percent increase in Revenue per Available Room (RevPAR) this year, compared to 2003, the largest jump in 20 years, according to the Travel Industry Association of America. PwC also forecasts a 3.7 percent increase in Average Daily Room Rates (ADR). The outlook is due mainly to a forecasted increase in business travel, and a subsequent increase in higher-rate lodging demand.

##### ☛ AAA: Gas Prices Nationwide May Escalate Due to Hurricane Ivan

Hurricane Ivan has the potential to create upward pressure on gas prices throughout much of the nation, according to [AAA](#). Because of the safety-related shutdown of oil drilling platforms in the Gulf of Mexico, as well as the delay in oil imports and gas deliveries in the area, consumers may experience an increase in price at the pump over the next few weeks. Currently, the national average is down two cents (from mid-August) at \$1.839 per gallon. Gas prices in the West are down 2.1 cents per gallon, averaging \$1.967 per gallon.

##### ☛ U.S. Department of Commerce Announces New Co-op Travel Marketing Program in U.K.

The U.S. Department of Commerce announced the launch of a cooperative marketing program designed to target leisure travelers from the United Kingdom. The program creates promotion and sales opportunities for the tourism trade, both in the U.S. and U.K., and leverages the Federal Government's marketing initiatives. The in-market promotional opportunities include television spots, print fulfillment, web marketing, direct marketing, and custom initiatives. The campaign's overall goal is to raise awareness of the U.S. as a tourism destination, and to increase visitation from America's largest overseas travel market. The programs official website is: [www.USTourismCoop.com](http://www.USTourismCoop.com)

##### ☛ JTB Pilots Two Travel Discount Programs in Japan

The Japan Travel Bureau has debuted two pilot travel discount campaigns – “Birthday Discount” and “Ladies Discount” – to stimulate overseas travel in September and October, according to *Travel Journal International*. The “Birthday Discount” campaign, slated for September and October, applies to travelers age 20 or older, with birthdays falling within the month of departure, and may include up to three other traveling companions. The program offers a ¥5,000 (approximately \$45) discount per person for trips to Hawai'i and Bali. Similarly, the “Ladies Discount,” available in September, offers a ¥5,000 discount to females traveling in groups of two or more. This discount is offered on tour packages to Guam and Saipan. JTB said it may extend the campaigns, depending on the results of the pilot programs.

*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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