

2009

Visitor Satisfaction Monitoring Report

Fourth Quarter
(October - December)



TOURISM AUTHORITY

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INTRODUCTION

This monitoring report presents selected preliminary statistics from the 2009 Visitor Satisfaction and Activity survey. The survey measures the opinions of visitors, regarding their satisfaction with Hawai'i as a visitor destination, from four major marketing areas: U.S. West, U.S. East, Japan, and Canada (see Definition and Survey Methodology). The report highlights survey respondents' evaluation of the vacation experience, including: overall satisfaction with the most recent vacation to Hawai'i, trip expectations, likelihood to recommend Hawai'i, likelihood to revisit Hawai'i, reasons for not revisiting Hawai'i, satisfaction by island, and trip planning timeline.

For further information about obtaining visitor data and other sources, contact the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email info@hawaiiourismauthority.org.

CONDITION OF VISITOR INDUSTRY

In the fourth quarter (October - December) of 2009, a total of 1,542,219 visitors arrived by air to the state, about the same (+0.6%) as in the fourth quarter of 2008. Arrivals from Japan with 283,615 visitors increased 3 percent compared to fourth quarter 2008. Arrivals from U.S. West with 634,999 visitors (+0.8%) and Canada with 98,866 visitors (-0.3%) were stable while U.S. East arrivals with 338,183 visitors (-3.1%) declined. The average length of stay for all visitors to the state was 9.52 days, compared to 9.61 days in the fourth quarter of 2008.

In the fourth quarter of 2009, statewide first-time visitors comprised 34.1 percent of total visitors, virtually unchanged from 33.9 percent in the fourth quarter of 2008. The share of first-time visitors among Japan visitors rose to 46.3 percent from 43.8 percent in fourth quarter 2008. The

share of first-time visitors among U.S. West (17.5%, -0.6 percentage points), U.S. East visitors (41.3%, -0.2 percentage points) were similar while Canada (35.6%) was unchanged from fourth quarter 2008.

In calendar year 2009, total arrivals by air fell 4.4 percent to 6,419,138 visitors compared to 2008. The decrease was due to lower visitor arrivals from U.S. East (-7.2%), Canada (-5.8%), Japan (-4.9%) and U.S. West (-1.8%). The combined length of stay was stable 9.43 days.

In calendar year 2009, statewide first-time visitors comprised 34.2 percent of total visitors, similar to 34.8 percent in 2008. The share of first-time visitors among U.S. West (19.1%, -0.5 percentage points), U.S. East (43%, -0.9 percentage points), Japan (42.1%, -0.2 percentage points) and Canada visitors (37.9%, -0.8 percentage points) were similar to 2008.

RESULTS

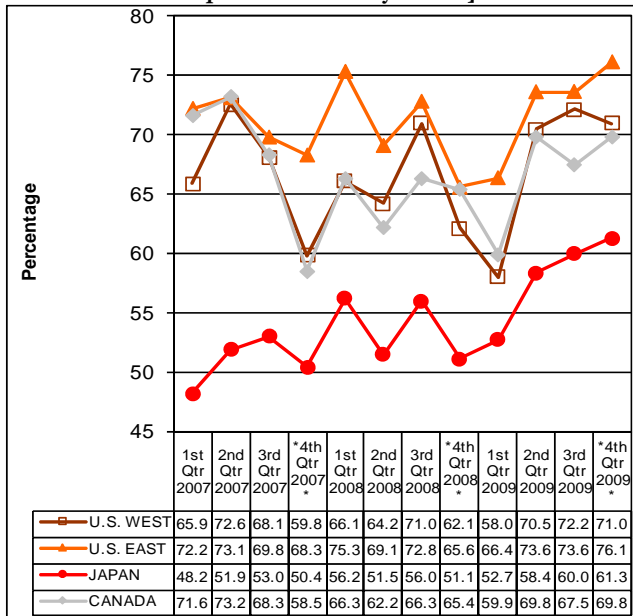
Visitor Satisfaction Ratings

Visitor satisfaction is an important indicator of industry performance. This measure provides vital feedback on how well services are delivered and how well the industry meets expectations. High satisfaction is also a leading-indicator of customer retention and loyalty. Satisfying visitors' needs and expectations encourages return trips to Hawai'i. Satisfied customers also develop a fondness for the destination which results in a higher likelihood to recommend Hawai'i to others.

Vacation to Hawai'i Was Rated Excellent

Overall, more than half of visitors from any major marketing area continued to rate their most recent trip to Hawai'i as *excellent* (see Figure 1).

Figure 1: Overall Rating of Trip
[Percentage of visitors who rated most recent trip “Excellent” by MMA]

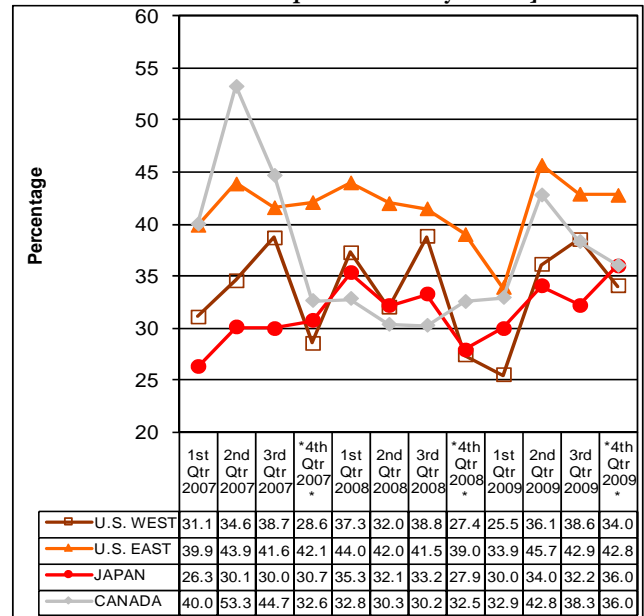


- The percentage of visitors from all four major markets who rated their trip to Hawai‘i excellent in the fourth quarter of 2009 were higher compared to fourth quarter 2008. Ratings from Japan (61.3%, +10.2 percentage points), U.S. East (76.1%, +10.5 percentage points) and U.S. West (71%, +8.9 percentage points) significantly improved while Canada visitors (69.8%, +4.4 percentage points) also increased from fourth quarter of 2008.

Exceeded Expectations

The visitors’ evaluation of the trip is influenced not only by the attributes and characteristics of the service but also by the needs, motivations, and interests of the visitors. Therefore, it is important to measure how well the destination was able to provide the experience that was expected. Overall, Hawai‘i’s ability to exceed expectations continues to be quite strong (see Figure 2).

Figure 2: Trip Exceeds Expectations
[Percentage of visitors who said this trip “Exceeded Expectations” by MMA]

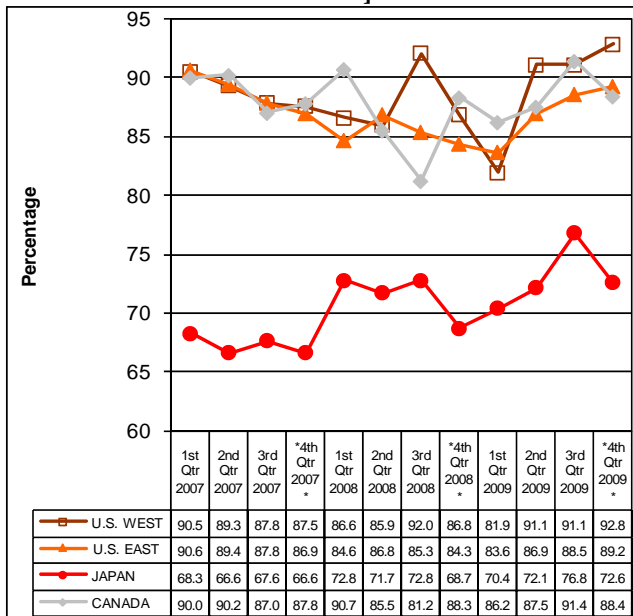


- Japan visitor ratings in the fourth quarter of 2009 (36%) were 8.1 percentage points higher compared to the fourth quarter of 2008 and 5.3 percentage points higher compared to the fourth quarter of 2007.
- In the fourth quarter of 2009, the proportion of U.S. West (34%, +6.6 percentage points), U.S. East (42.8%, +3.8 percentage points) and Canada (+36%, +3.5 percentage points) visitors who said their recent trip to Hawai‘i exceeded expectations were also higher than fourth quarter of 2008.

Very Likely to Recommend Hawai‘i

When visitors are highly satisfied with their trip, they are more likely to recommend the destination to friends and family. Many Hawai‘i visitors reported to be *very likely to recommend* this destination to others. Word-of-mouth advertising is important in marketing Hawai‘i. These referrals, in time, develop more first-time visitors to Hawai‘i and encourage previous visitors to return. At least two-thirds of visitors in any MMA stated that they would be very likely to recommend Hawai‘i (see Figure 3).

Figure 3: Very Likely to Recommend Hawai'i to Friends and Relatives
 [Percentage of visitors who are "Very Likely" to recommend Hawai'i as a vacation place by MMA]

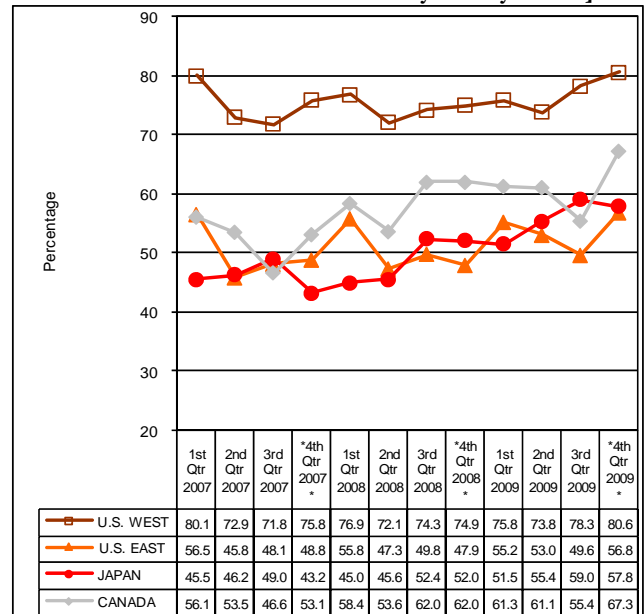


- More U.S. West (92.8%, +6 percentage points) and U.S. East (89.2%, +4.9 percentage points) in the fourth quarter of 2009 were very likely to recommend Hawai'i to friends and relatives compared to the fourth quarter of 2008.
- The percentage of Japan (72.6%, +3.9 percentage points) visitors was also higher while Canada visitor ratings (88.4%) were consistent with fourth quarter of 2008.

Likelihood to Revisit Hawai'i

A visitor's decision to return to Hawai'i is influenced by positive experiences on the most recent trip and other factors such as curiosity for new experiences, available time, financial situation, and other commitments. Likelihood to revisit Hawai'i, as an indicator, helps to estimate future demand and changes in desires. Visitors appeared to be satisfied with their vacations and their sentiments toward returning in the near future seemed positive (see Figure 4).

Figure 4: Very Likely to Revisit Hawai'i
 [Percentage of visitors who are "Very Likely" to revisit Hawai'i in the next five years by MMA]

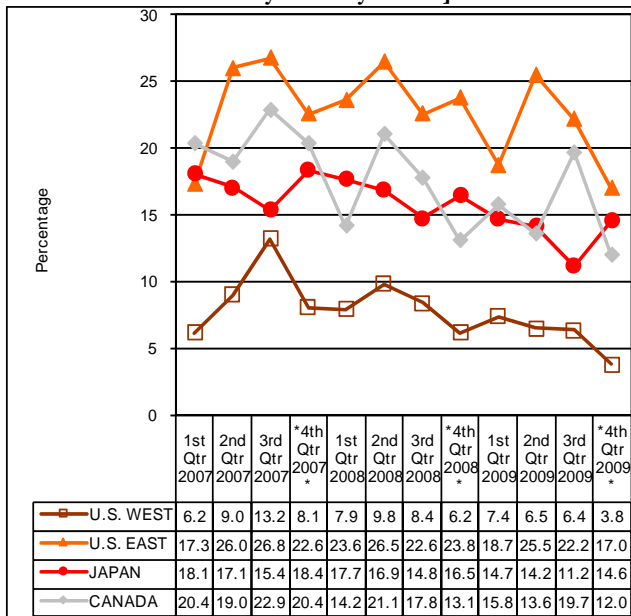


- In the fourth quarter of 2009, all four major markets showed improvements in the percentage of visitors who were very likely to revisit Hawai'i in the next five years compared to the fourth quarter of 2008.
- The share of U.S. West (80.6%) visitors who were very likely to revisit Hawai'i in the next five years were 5.7 percentage points higher compared to the fourth quarter of 2008 and 4.8 percentage points higher compared to the fourth quarter of 2007. U.S. East share (56.8%) were 8.9 percentage points higher compared to the fourth quarter of 2008 and 8 percentage points higher compared to the fourth quarter of 2007.
- Japan share of visitors who were very likely to revisit Hawai'i in the next five years (57.8%) also increased, up 5.8 percentage points compared to the fourth quarter of 2008 and 14.6 percentage points higher compared to the fourth quarter of 2007.
- More Canada visitors in fourth quarter 2009 (67.3%, +5.3 percentage points) were also very likely to revisit compared to the fourth quarter of 2008.

Not Likely to Revisit Hawai'i

The percentage of respondents who answered that they were *“Not too likely”* or *“Not at all likely”* to visit Hawai'i in the next five years continued to be fairly low among U.S. West visitors while moderately higher for Japan, Canada, and U.S. East visitors (see Figure 5).

Figure 5: Not Likely to Revisit Hawai'i
[Percentage of visitors who are “Not too likely” or “Not at all likely” to visit Hawai'i in the next five years” by MMA]



- In the fourth quarter of 2009, the percentage of U.S. East visitors (17%, -6.8 percentage points) who were not likely to revisit was significantly lower compared to the fourth quarter of 2008. The percentage of U.S. West visitors (3.8%, -2.4 percentage points) also decreased compared to the fourth quarter of 2008.
- Close to 15 percent of Japan visitors were not likely to revisit Hawai'i in the next five years. The proportion was similar to fourth quarter of 2008 (16.5%) and 3.8 percentage points lower than fourth quarter 2007.
- One out of nine (12%) Canada visitors were not likely to revisit Hawai'i in the next five years, 1.1 percentage points lower than fourth

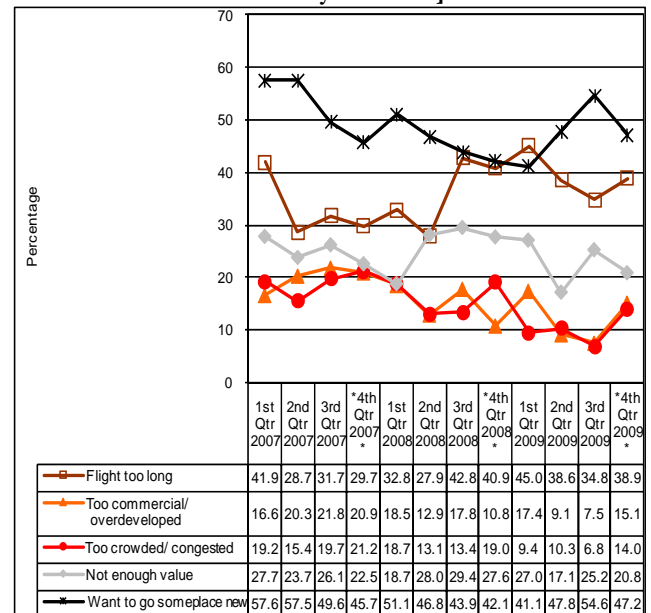
quarter 2008 and 8.4 percentage points lower than fourth quarter 2007.

Reasons for Not Revisiting Hawai'i

Note that the statistic reported for each reason for not revisiting Hawai'i is the percentage of those who were *Not Likely to Revisit Hawai'i* (from previous section).

- Less than half of U.S. visitors in fourth quarter 2009 were not likely to revisit Hawai'i because they want to visit someplace new (47.2%). The proportion was higher compared to the fourth quarter of 2008 (42.1%) and fourth quarter of 2007 (45.7%) (Figure 6).

Figure 6: Reasons for Not Revisiting Hawai'i - U.S. [Percentage of visitors who were not likely to revisit]

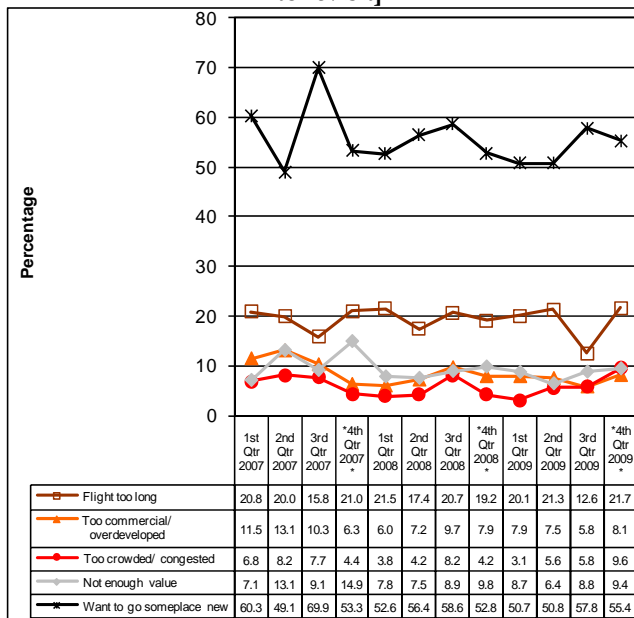


- The share of U.S. visitors who said that the flight was too long (38.9%) dropped 2 percentage points compared to the fourth quarter of 2008 but increased 9.2 percentage points compared to the fourth quarter of 2007.
- Fewer U.S. visitors said that Hawai'i did not provide enough value (20.8%) compared to

the fourth quarter of 2008 (27.6%) and the fourth quarter of 2007 (22.5%).

- More U.S. visitors said that Hawai'i was too commercial/overdeveloped (15.1%, +4.3 percentage points) but fewer said that it was too crowded/congested (14%, -5 percentage points) compared to fourth quarter 2008.

Figure 7: Reasons for Not Revisiting Hawai'i - Japan [Percentage of visitors who were not likely to revisit]



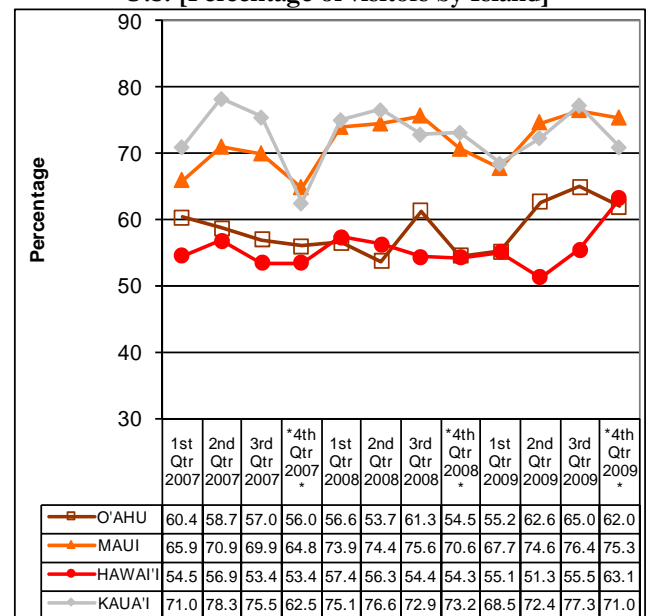
- In the fourth quarter of 2009, over half (55.4%) of visitors from Japan said that they want to visit someplace new. The proportion was similar to fourth quarter 2008 (52.8%) and fourth quarter 2007 (53.3%) (Figure 7).
- Two out of ten Japan visitors in fourth quarter of 2009 thought that the flight was too long (21.7%), about the same ratio as fourth quarter 2008 (19.2%) and fourth quarter 2007 (21%).
- More Japan visitors in fourth quarter of 2009 thought that Hawai'i was too crowded/congested (9.6%) compared to fourth quarter 2008 (4.2%) and fourth quarter 2007 (4.4%).

- Close to 8 percent of Japan visitors in the fourth quarter of 2009 said that Hawai'i did not provide enough value, similar to fourth quarter 2008 (9.8%) and but lower than fourth quarter 2007 (14.9%).

Individual Island Experience

Each island has unique characteristics, activities, and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip.

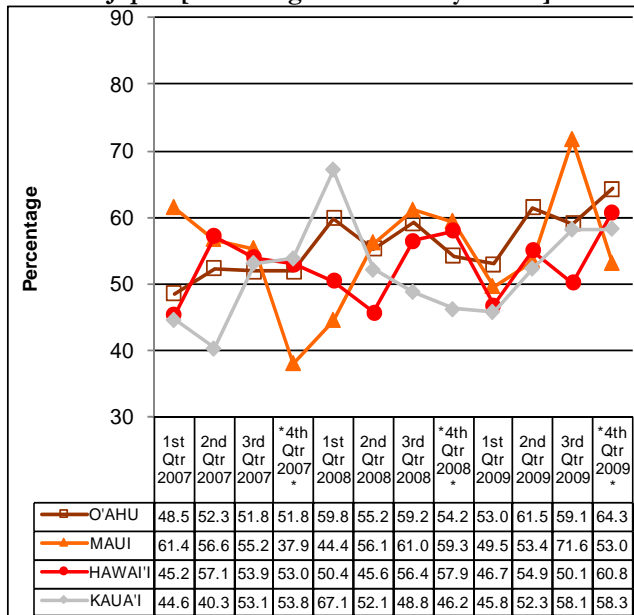
Figure 8: Island Experience Rated as Excellent – U.S. [Percentage of visitors by Island]



- Since 2007 U.S. visitors to Maui or Kaua'i were more likely to say they had an excellent experience than U.S. visitors to O'ahu or Hawai'i Island (see Figure 8). O'ahu's ratings have improved in recent quarters of 2009.
- In the fourth quarter of 2009, the share of U.S. visitors who rated Hawai'i Island excellent (63.1%) increased 8.8 percentage points from fourth quarter 2008 and 9.7 percent from fourth quarter 2007.

- The share of U.S. visitors who rated O‘ahu excellent (62%) rose 7.5 percentage points from fourth quarter 2008 and 6 percent from fourth quarter 2007.
- Maui’s excellent ratings by U.S. visitors in the fourth quarter 2009 (75.3%) also increased from fourth quarter of 2008 (70.6%) and fourth quarter 2007 (64.8%).
- U.S. visitor ratings for Kaua‘i (71%) declined 2.2 percentage points from fourth quarter 2008 but increased 8.5 percentage points from fourth quarter 2007.

Figure 9: Island Experience Rated as Excellent - Japan [Percentage of visitors by Island]

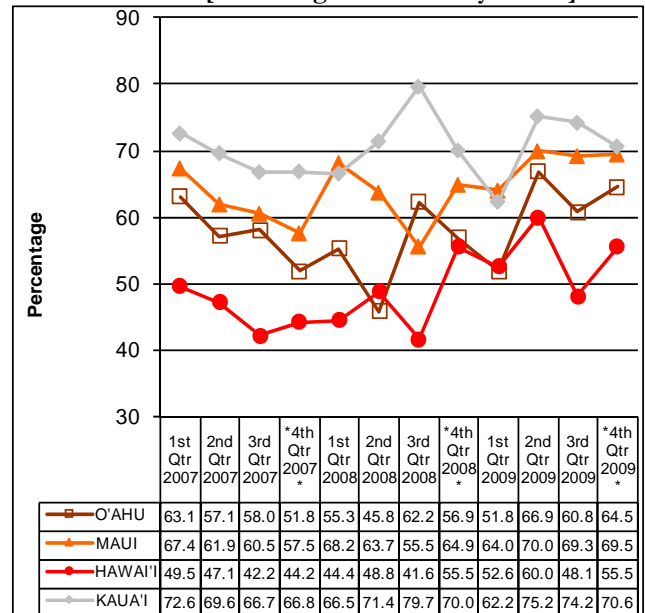


- In the fourth quarter of 2009, 58.3 percent of Japan visitors rated Kaua‘i excellent. The proportion was 12.1 percentage points higher compared to the fourth quarter of 2008 and 4.5 percentage points higher compared to the fourth quarter of 2007 (Figure 9).
- Japan visitors rating for O‘ahu was also significantly higher (64.3%) compared to fourth quarter 2008 (54.2%) and fourth quarter of 2007 (51.8%).
- Maui ratings (53%) among Japan visitors fell 6.3 percentage points from fourth quarter

2008 but increased 15.1 percentage points from fourth quarter 2007.

- Close to 60 percent of Japan visitors rated Hawai‘i Island excellent in the fourth quarter of 2009, up 2.9 percentage points from fourth quarter 2008 and 7.8 percentage points higher than fourth quarter 2007.

Figure 10: Island Experience Rated as Excellent - Canada [Percentage of visitors by Island]



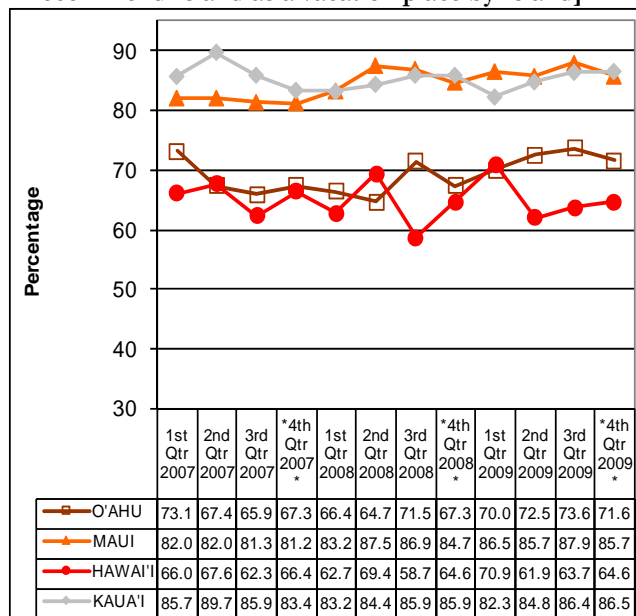
- Canada visitor satisfaction ratings in the fourth quarter of 2009 significantly improved for O‘ahu (64.5%) compared to the fourth quarter of 2008 (56.9%) and 2007 (51.8%) (Figure 10).
- Maui ratings by visitors from Canada (69.5%) were 4.6 percentage points higher than fourth quarter 2008 and 12 percentage points higher compared to fourth quarter 2007.
- Canada visitor ratings for Kaua‘i (70.6%) were consistent with fourth quarter 2008 and 3.8 percent points higher than fourth quarter 2007.
- Hawai‘i Island satisfaction ratings from Canada visitors for fourth quarter 2009 (55.5%) were unchanged from fourth quarter

of 2008 and 11.3 percentage points better than fourth quarter 2007.

Individual Island Recommendation

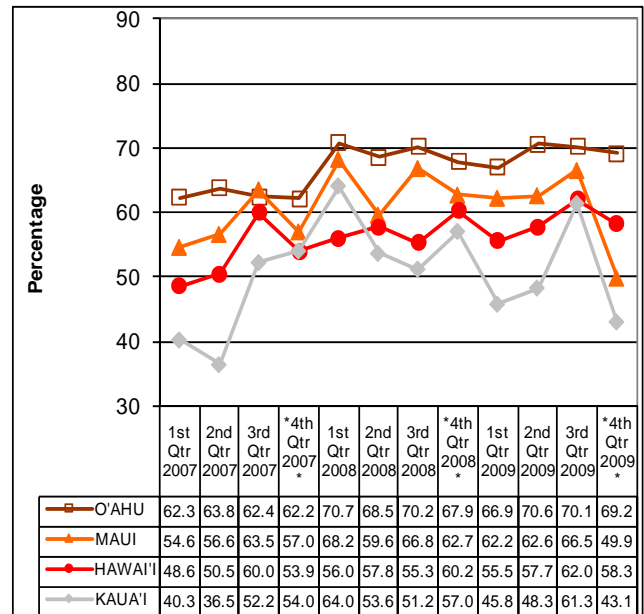
When visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family.

Figure 11: Very Likely to Recommend Island – U.S.
[Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



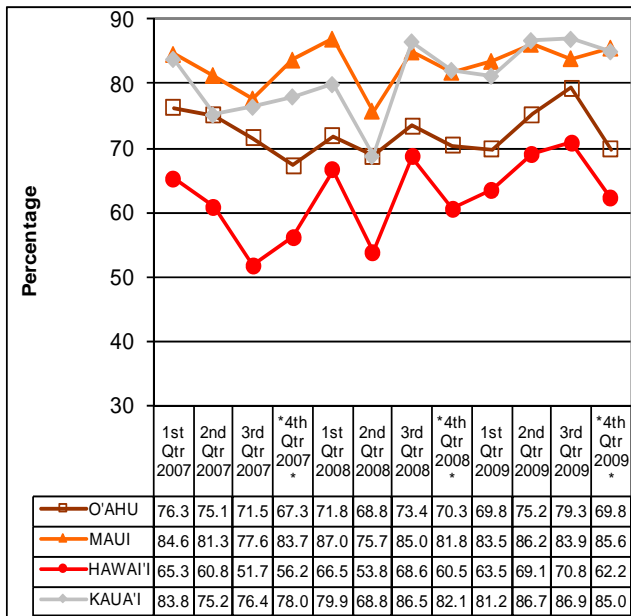
- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (see Figure 11).
- In the fourth quarter of 2009, the percentage of U.S. visitors who were very likely to recommend O'ahu (71.6%) showed improvement over the fourth quarter of the previous year (67.3%).
- The share of U.S. visitors who were very likely to recommend Maui (85.7%), Kaua'i (86.5%) or Hawai'i Island (64.6%) was similar compared to the fourth quarter of 2008.

Figure 12: Very Likely to Recommend Island – Japan
[Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



- Japan visitors in the fourth quarter 2009 continued to be more likely to recommend O'ahu (69.2%) over the other islands, consistent with fourth quarter 2008 and 7 percentage point higher than fourth quarter 2007 (Figure 12).
- Maui's ratings fell from second to third behind Hawai'i Island, due to a 12.8 percentage points decrease to 49.9 in the fourth quarter of 2009.
- Hawai'i Island's fourth quarter 2009 rating (58.3%) similar to fourth quarter 2008 (60.2%) and 4.4 percentage points higher than fourth quarter 2007 (53.9%).
- Significantly fewer Japan visitors in the fourth quarter of 2009 were very likely to recommend Kaua'i (43.1%) compared to the fourth quarter of 2008 (57%) and 2007 (54%).

Figure 13: Very Likely to Recommend Island – Canada
 [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]

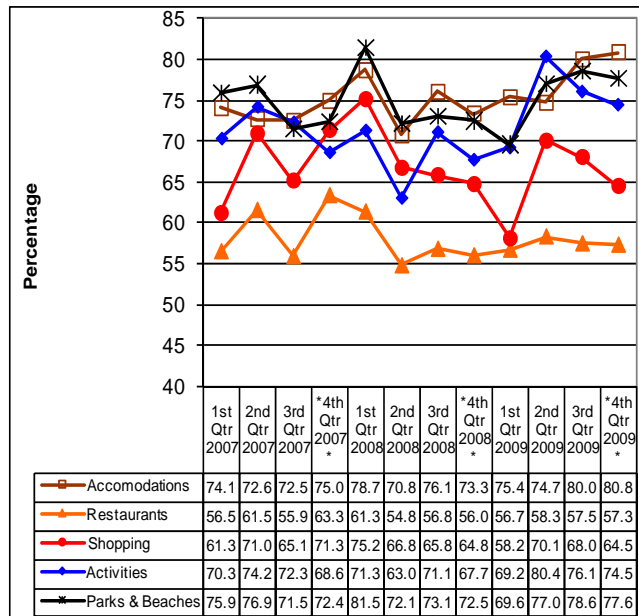


- Since 2007 Canada visitors were more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (Figure 13).
- In the fourth quarter of 2009, 85.6 percent of Canada visitors were very likely to recommend Maui, up 3.8 percentage points from fourth quarter 2008.
- Canada visitor ratings for Kaua'i (85%, +2.9 percentage points), O'ahu (69.8%, -0.5 percentage points) and Hawai'i Island (62%, +1.7 percentage points) were similar compared to fourth quarter 2008.

Attributes of Each Island

Analysis of the visitors' satisfaction with the specific attributes, activities, and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction rating was determined by the percentage of those who were **“Very Satisfied”** by an attribute.

Figure 14: Detailed Satisfaction Ratings for U.S. Visitors to O'ahu
 [Percentage of U.S. visitors to O'ahu who were “Very Satisfied” with Attribute]

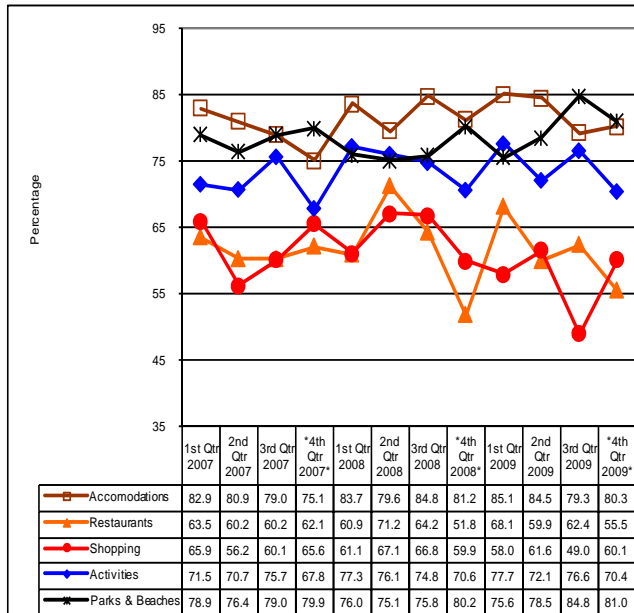


- Accommodations on O'ahu were the highest rated attribute among U.S. visitors (80.8%) in the fourth quarter of 2009, followed by parks and beaches (77.6%) and activities (74.5%). Restaurants (57.3%) on O'ahu continued to be the lowest rated attribute in the fourth quarter of 2009 (Figure 14).
- Fourth quarter 2009 ratings by U.S. visitors for all attributes on O'ahu either showed moderate improvements or were consistent with fourth quarter 2008 results.
- The percentage of U.S. visitors who were very satisfied with the O'ahu's accommodations rose 7.5 percentage points to 80.8 percent. Over three out of four U.S. visitors were very satisfied with the location (82.3%), cleanliness and comfort (78.1%), service (77.1%) and facility (76.3%) of the accommodations on O'ahu while two out of three visitors were very satisfied with the value for the money (67.2%).
- The percentage of U.S. visitors who were very satisfied with the O'ahu's activities/attractions rose 6.8 percentage points to 74.5 percent in fourth quarter 2009. Seven out of ten U.S.

visitors were very satisfied with the variety (70%), excitement (69.1%), service (68.4%) and 48.4 percent were very satisfied with the value.

- Ratings for O’ahu’s parks and beaches (77.6%, +5.1 percentage points) also increased from fourth quarter 2008. Two out of three visitors were very satisfied with the facilities (66.6%), cleanliness and comfort (65.8%) and security (64%).

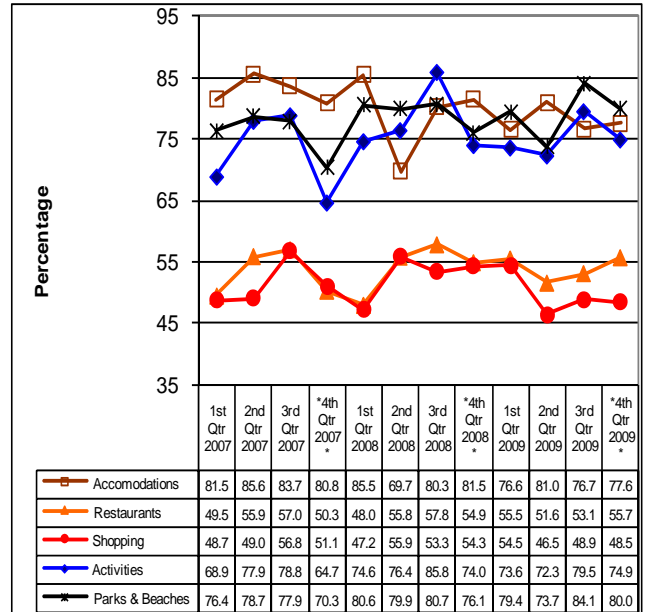
Figure 15: Detailed Satisfaction Ratings for U.S. Visitors to Maui [Percentage of U.S. visitors to Maui who were “Very Satisfied” with Attribute]



- Parks and beaches (81%) on Maui was the highest rated attribute among U.S. visitors in the fourth quarter of 2009, followed by and accommodations (80.3%), activities (70.4%) and shopping (60.1%) (Figure 15). Ratings for these attributes were consistent with fourth quarter 2008 results.
- Restaurants were the lowest rated attribute on Maui in fourth quarter 2009 at 55.5 percent. This was an improvement from fourth quarter 2008 (51.8%), but lower than fourth quarter 2007 (62.1%). Six out of ten U.S. visitors in fourth quarter 2009 were very satisfied with the location (67.4%), service (62.8%), quality

(62%) and variety (60.3%) of Maui’s restaurants but only 30.9 percent felt that there was value for the money.

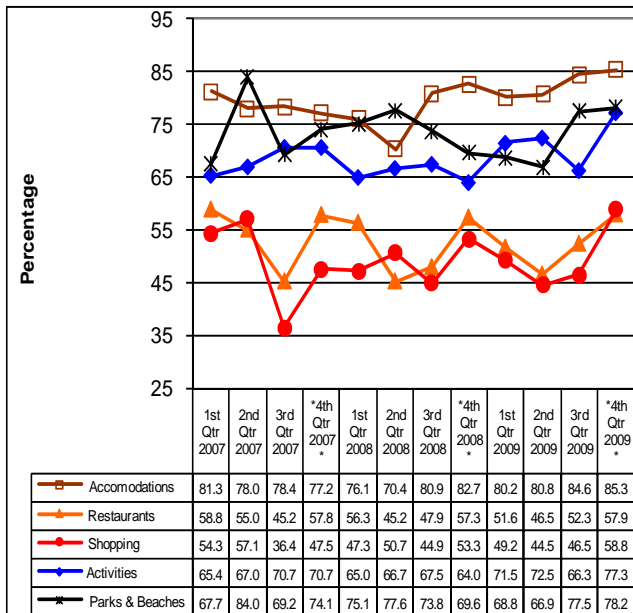
Figure 16: Detailed Satisfaction Ratings for U.S. Visitors to Kaua’i [Percentage of U.S. visitors to Kaua’i who were “Very Satisfied” with Attribute]



- U.S. visitors in fourth quarter 2009 tended to be more satisfied with Kaua’i’s parks and beaches (80%), accommodations (77.6%), and activities (74.9%). Restaurants (55.7%) and shopping (48.5%) ratings on the island continued to be rated much lower than other attributes (Figure 16).
- Ratings on Kaua’i’s parks and beaches rose 3.9 percentage points from fourth quarter 2008 and 9.7 percentage points from fourth quarter 2007.
- Fewer U.S. visitors (-3.9 percentage points) rated Kaua’i’s accommodations excellent compared to the fourth quarter of 2008 (81.5%).
- Fewer U.S. visitors in fourth quarter 2009 gave excellent ratings to shopping on Kaua’i (48.5%) compared to fourth quarter 2008 (54.3%). Close to half of U.S. visitors in fourth quarter 2009 were very satisfied with

the service (57.5%), location (53%), local/handmade items (51.7%), sufficient number of shopping places (51.5%), quality (47%) and variety (46.5%) of Kaua'i's shopping but only 30.8 percent were very satisfied with the value for their money.

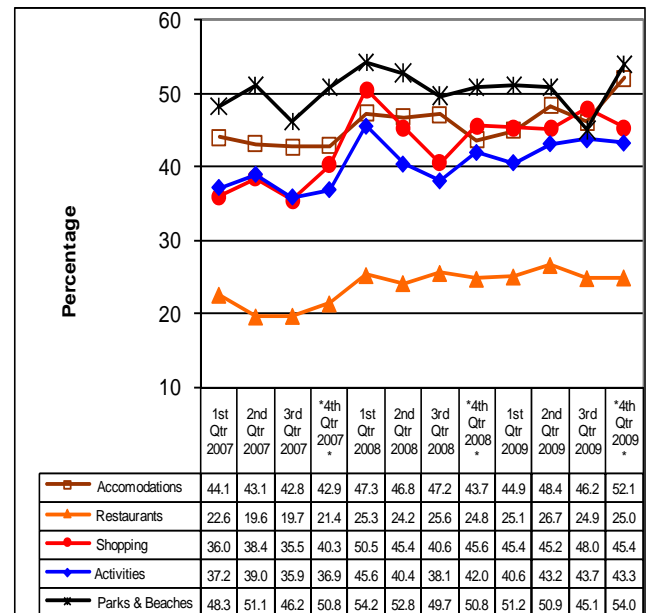
Figure 17: Detailed Satisfaction Ratings for U.S. Visitors to Hawai'i Island [Percentage of U.S. visitors to Hawai'i Island who were "Very Satisfied" with Attribute]



- Hawai'i Island's accommodations remained the highest rated attribute among U.S. visitors in the fourth quarter of 2009 (85.3%), followed by parks and beaches (78.2%) and activities (77.3%). Similar to Kaua'i and Maui, ratings were much lower for Hawai'i Island's shopping (58.8%) and restaurants (57.9%) (Figure 17).
- In the fourth quarter of 2009, Hawai'i Island activities ratings, among U.S. visitors, improved 13.3 percentage points over the fourth quarter of 2008 (64%). Seven out of ten visitors were very satisfied with the excitement (71.5%), service (70.4%) and variety (66.7%) and 53.2 percent were very satisfied with the value.

- Ratings for the island's parks and beaches among U.S. visitors also increased (+8.6 percentage points) from fourth quarter of 2008 (69.6%).
- Ratings for shopping on the island among U.S. visitors were 5.5 percentage points higher than fourth quarter of 2008 (53.3%) and 11.3 percentage points more than fourth quarter of 2007 (47.5%).

Figure 18: Detailed Satisfaction Ratings for O'ahu – Japan [Percentage of Japan visitors to O'ahu who were "Very Satisfied" with the Attribute]



- In fourth quarter of 2009, parks and beaches (54%) was the highest rated attribute among Japan visitors on O'ahu, followed by accommodations (52.1%), shopping (45.4%) activities (43.3%) (Figure 18).
- Japan visitors' ratings for parks and beaches on O'ahu (54%) were 3.2 percent points higher than fourth quarter 2008.
- O'ahu's accommodations ratings among Japan visitors improved 8.4 percentage points from 43.7 percent in the fourth quarter of 2008. Over half of Japan visitors in the fourth quarter 2009 were very satisfied with the location (54.9%). Four out of ten Japan

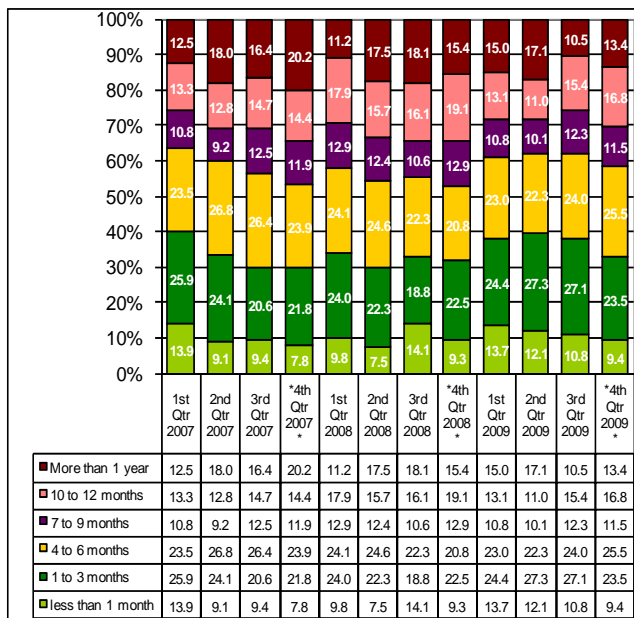
visitors were very satisfied with the cleanliness and comfort (44.4%), value for the money (44%) but fewer were very please with the service (39.1%) and facility (30.5%).

- Fourth quarter 2009 ratings by Japan visitor for activities, restaurants and shopping on O’ahu were fairly consistent with fourth quarter 2008.
- Restaurants continued to be the lowest rated attribute. In the fourth quarter of 2009, 25 percent of Japan visitors were very satisfied with restaurants on O’ahu. About a third of Japan visitors in fourth quarter 2009 were very satisfied with the location (34.2%), variety (27%), quality (24.2%) and service (22.3%) while 19.7 percent were very pleased with the value.

Trip Planning Cycle

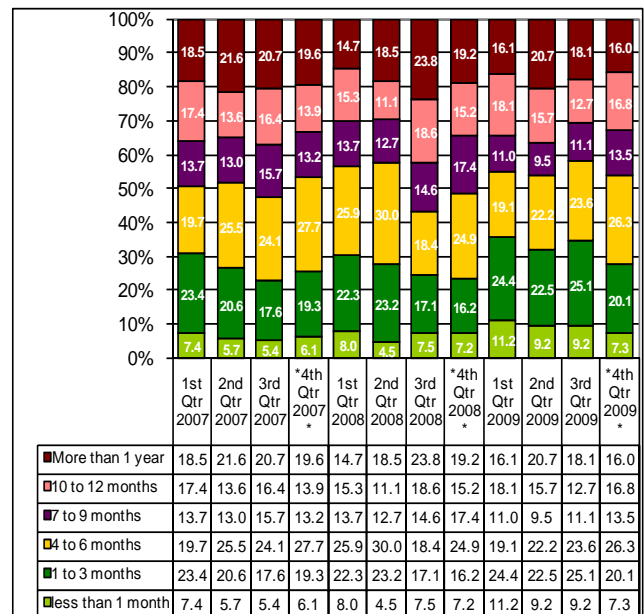
Information on how visitors plan their trips and when they make major decisions can greatly enhance preparation of effective marketing and promotion plans.

Figure 19: When Did U.S. West Visitors Decide to Visit Hawai’i in Advance of Departure [Percentage of U.S. West visitors]



- The majority of U.S. West visitors continued to make decisions four months or more before arriving.
- In the fourth quarter of 2009, 67.2 percent of U.S. West visitors made their decision to visit Hawai’i four or more months before departure, similar to the fourth quarter of 2008 (68.2%) and 2007 (70.4%) (Figure 19).
- The majority of U.S. West visitors in the fourth quarter 2009 purchased package tours (68.5%) less than one month before departure. Two out of three U.S. West visitors made rental car reservations (66.6%) three months or less; while 71.4 percent made accommodation reservations six months or less before their visit.

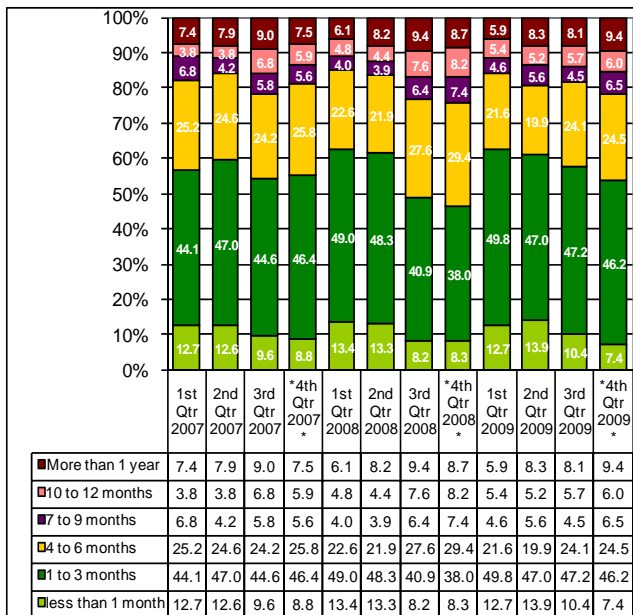
Figure 20: When Did U.S. East Visitors Decide to Visit Hawai’i in Advance of Departure [Percentage of U.S. East visitors]



- In the fourth quarter of 2009, 59.9 percent of U.S. East visitors were likely decide to visit Hawai’i one to nine months before departure, consistent with fourth quarter 2008 (58.5%) and 2007 (60.2%) (Figure 20).
- Three out of four of U.S. East visitors in fourth quarter 2009 made accommodation

reservations (71.9%) six months or less before coming to the islands. Over sixty percent of U.S. East visitors made rental car reservations (66.1%) three months or less; and purchased packaged (66.6%) tours less than one month before departure.

Figure 21: When Did Japan Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of Japan visitors]



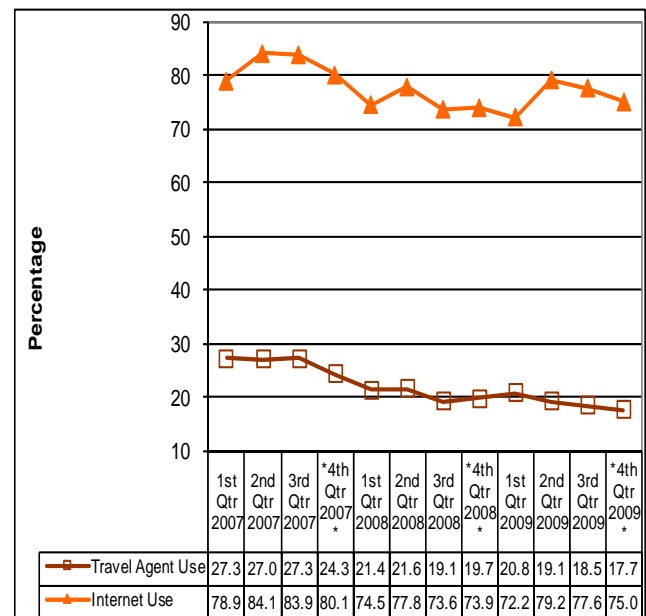
- In the fourth quarter of 2009, the proportion of Japan visitors who decided to visit Hawai'i three months or less (53.6%) before departure was significantly higher than the fourth quarter of 2008 (46.3%) but similar to fourth quarter 2007 (55.2%) (Figure 21).
- The majority of Japan visitors in fourth quarter 2009 made accommodations reservations (77.2%) and rental car reservations (89.5%) three months or less before departure while 62.1 percent purchased packages less than one month before their departure.

Internet and Travel Agent Use

The use of the Internet or a travel agent for trip planning and booking differs quite considerably between U.S. and Japanese travelers to Hawai'i.

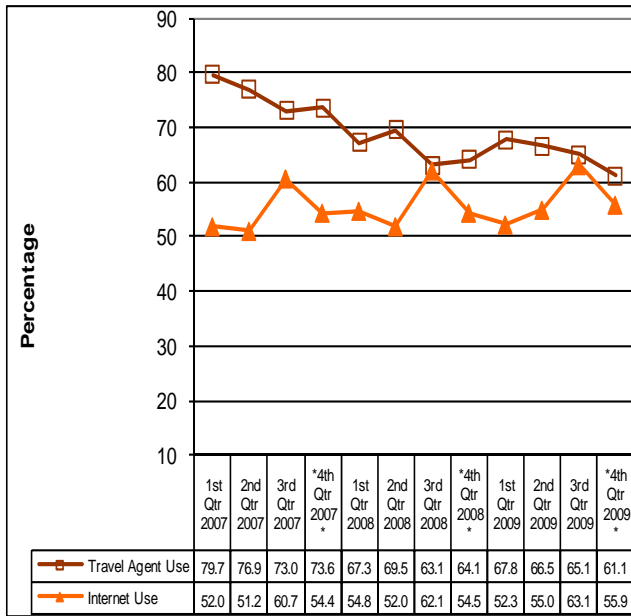
- About three out of four U.S. visitors used the internet for trip planning purposes while less than 20 percent of U.S. visitors used travel agents.

Figure 22: Internet and Travel Agent Use -- U.S. [Percentage of U.S. visitors]



- The percentage of U.S. visitors in the fourth quarter of 2009 (75%) who used the Internet for trip planning was similar fourth quarter 2008 (73.9%) but lower than fourth quarter 2007 (80.1%).
- The percentage of U.S. visitors who used travel agents has been trending downward since fourth quarter 2007 to 17.7 percent in fourth quarter 2009 (Figure 22).

Figure 23: Internet and Travel Agent Use – Japan
[Percentage of Japan visitors]

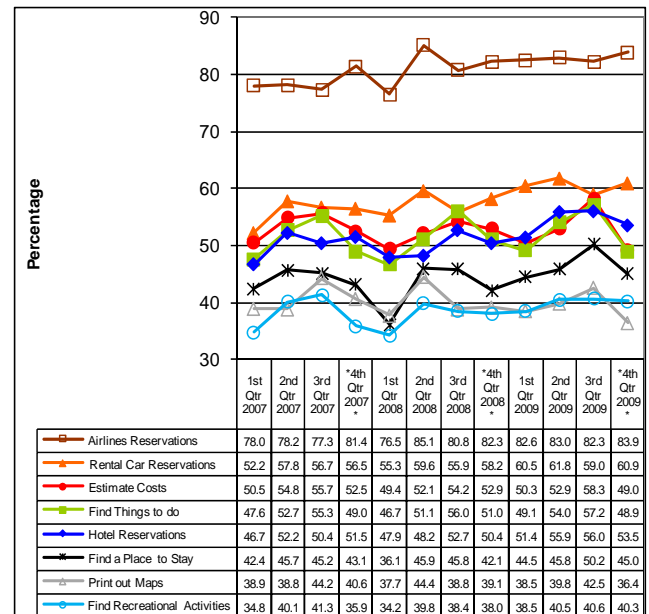


- In contrast to U.S. visitors, more Japanese visitors used travel agents than the Internet for trip planning. However, over the last two years, travel agent usage by Japanese visitors had been declining while Internet usage had been gaining popularity. In the fourth quarter of 2009, travel agent users comprised 61.1 percent of all Japan visitors. The proportion of travel agent users declined 3 percentage points from fourth quarter of 2008 (64.1%) and 12.5 percentage points from fourth quarter of 2007 (73.6%) (Figure 23).
- Internet usage was at 55.9 percent of Japan visitors in the fourth quarter of 2009, similar to fourth quarter 2008 (54.5%) and fourth quarter 2007 (54.4%).

Internet Use

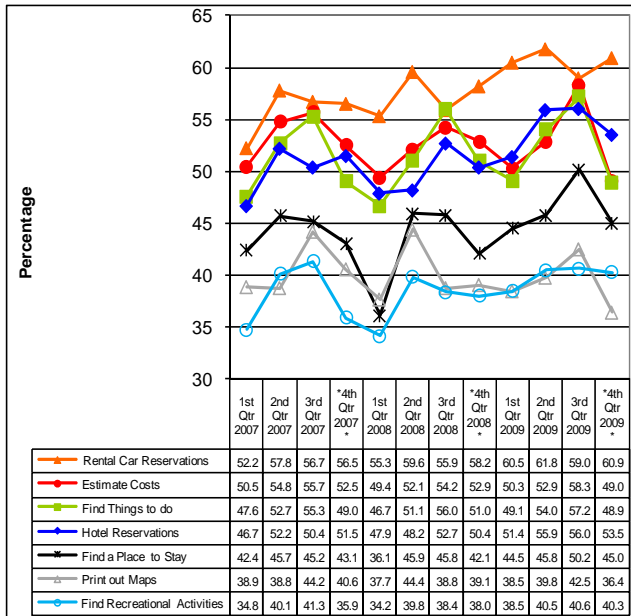
Note that the statistic reported for each Internet use is the percentage of those who used the Internet (from previous section).

Figure 24: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]



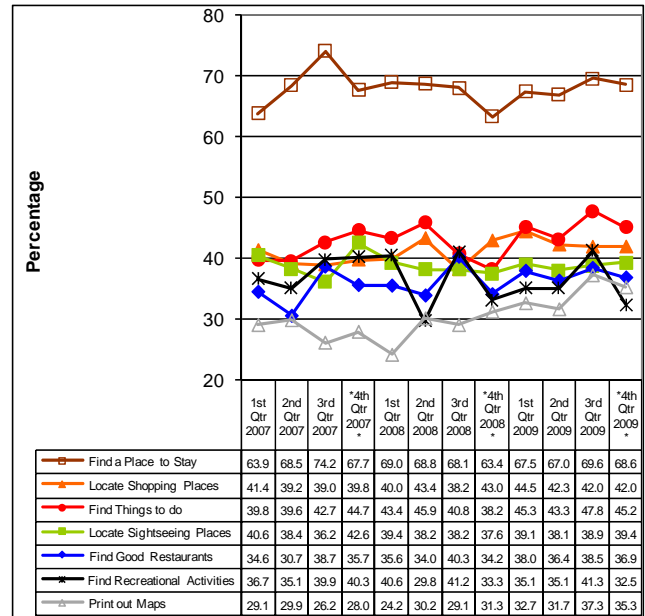
- Of the 75 percent of U.S. visitors who used the Internet in the fourth quarter of 2009, 83.9 percent (63% of all U.S. visitors) made airline reservations. The share of U.S. visitors who used the Internet to make airlines reservations was similar compared to the fourth quarter of 2008 (82.3% or 60.8% of all U.S. visitors) and increased 2.5 percentage points from fourth quarter 2007 (81.4% or 65.2 percent of all U.S. visitors) (Figure 24).

Figure 25: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet - scale expanded]



- Making car reservations continued to be the second most popular usage of the Internet among U.S. visitors. In the fourth quarter of 2009, 60.9 percent of U.S. Internet users made rental car reservations (45.7% of all U.S. visitors). This proportion was 2.7 percentage points higher compared to fourth quarter 2008 (58.2% or 43% of all U.S. visitors) and 4.4 percentage points higher than fourth quarter 2007 (56.5% or 45.2% of all U.S. visitors) (Figure 25).
- Over half of U.S. visitors in the fourth quarter of 2009 made hotel reservations on the Internet (53.5% or 40.1% of all U.S. visitors), up from 50.4 percent in fourth quarter 2008 and 51.5% in fourth quarter 2007.
- Similar percentages of U.S. visitors in the fourth quarter of 2009 used the Internet to estimate costs (49%) and to find things to do (48.9%).

Figure 266: Internet Use – Japan [Percentage of Japan visitors who used the Internet]

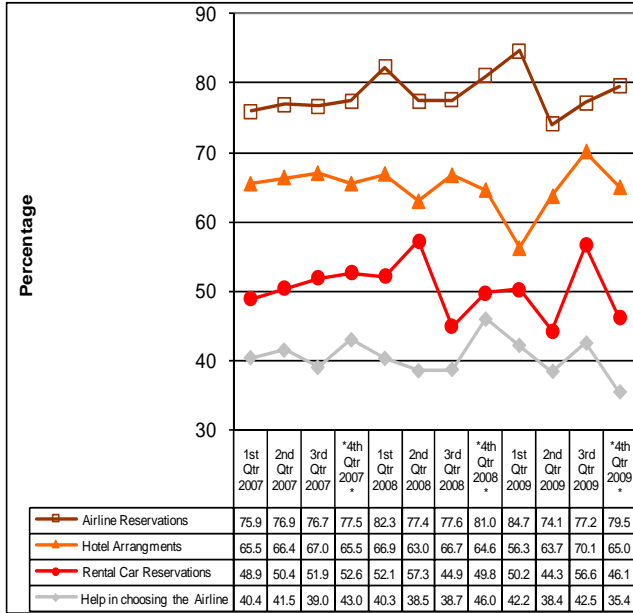


- Of the 55.9 percent of Japan visitors who used the Internet in the fourth quarter of 2009, 68.6 percent (38.3% of all Japan visitors) used it to find a place to stay. This was an increase of 5.2 percentage points compared to the fourth quarter of 2008 (63.4% or 34.5% of all Japan visitors) (Figure 246)
- The second most popular Internet use was to find things to do (45.2% or 25.2% of all Japan visitors). This usage of the internet rose 7 percentage points compared to fourth quarter 2008 (38.2% or 20.8% of all Japan visitors) (Figure 26).
- Four out of ten Japan visitors used the Internet to locate shopping places (23.5% of all Japan visitors). This proportion was similar to fourth quarter 2008 (43% or 23.4% of all Japan visitors).

Travel Agent Use

Note that the statistic reported for each travel agent use is the percentage of those who used a travel agent (from Internet and Travel Agent Use).

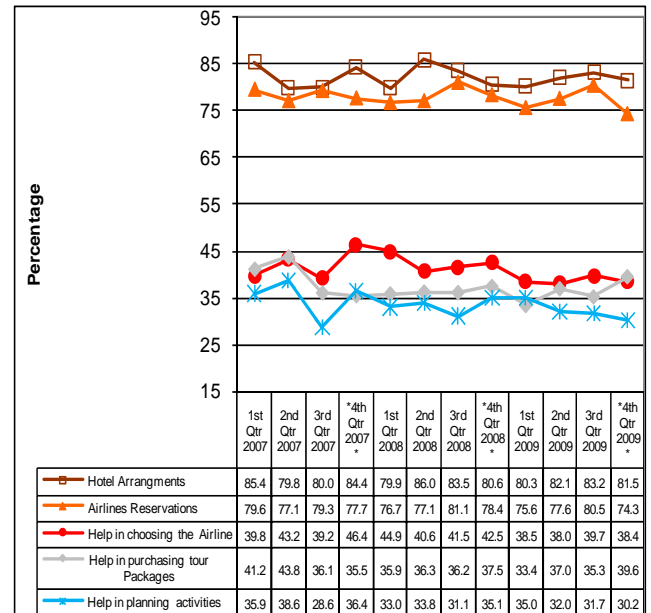
Figure 27: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]



- U.S. visitors mainly used travel agents to make airline reservations. Of the 17.7 percent of U.S. visitors who used a travel agent in the fourth quarter of 2009, 79.5 percent (14.1% of all U.S. visitors) made airline reservations. The proportion was about the same as fourth quarter of 2008 (81% or 16% of all U.S. visitors) and 2007 (77.5% or 18.8% of all U.S. visitors) (Figure 27).
- The second most popular use of travel agent among U.S. visitors in the fourth quarter 2009 was in making hotel arrangements (65% or 11.5% of all U.S. visitors). This was virtually unchanged from fourth quarter 2008 and 2007.

- In the fourth quarter of 2009, the percentage of U.S. visitors who used travel agents to make rental car reservations were 3.7 percentage points lower compared to fourth quarter 2008 (49.8% or 9.8% of all U.S. visitors) and 6.5 percentage points lower than fourth quarter 2007 (52.6% or 12.8% of all U.S. visitors).

Figure 28: Use of Travel Agent – Japan [Percent of Japan visitors who used a Travel Agent]



- The primary use of travel agents by Japan visitors continued to be for hotel arrangements (81.5% or 49.8% of all Japan visitors). This proportion was similar to fourth quarter of 2008 (80.6% or 51.7% of all Japan visitors) and 2.9 percentage points lower than fourth quarter 2007 (84.4% or 62.1% of all Japan visitors).
- The second most popular use of travel agents among Japan visitors in the fourth quarter 2009 were for airline reservations (74.3% or 45.4% of all Japan visitors) (Figure 28). This was down 4.1 percentage points from fourth quarter 2008 (78.4% or 50.2% of all Japan visitors) and 3.4 percentage points lower than fourth quarter 2007 (77.7% or 57.2% of all Japan visitors).

DEFINITION AND SURVEY METHODOLOGY

Major Market Areas (MMA): The following are defined by the Hawai'i Tourism Authority as the top four geographical areas for marketing purposes to make the state more globally competitive:

1. U.S. West – Pacific (Alaska, California, Oregon, Washington) and Mountain (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming) States.
2. U.S. East – Other States in the Continental U.S.
3. Japan
4. Canada

Survey questionnaires were mailed to selected U.S., Japan, and Canada visitors after they have returned home. U.S. samples were drawn from the completed Domestic In-Flight Survey forms (Basic Data Series). Japan and Canada samples were drawn from the completed International Departure Survey forms (Basic Data Series).

There are two versions of the Visitor Satisfaction Survey form, one in English and the other in Japanese. The English version was sent to U.S. and Canada visitors. The 2009 survey has 8 pages and 33 questions.

**Table 1: Sample Size
October - December 2009**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	1,622	609	37.5%	+/- 3.14
U.S.	7,610	2,183	28.7%	+/- 1.77
Canada	3,270	922	28.2%	+/- 2.74

Due to the low number of samples achieved, data for Lāna'i and Moloka'i were not presented in most of the data tables in this report.

The collected data was weighted to adjust for differences with the actual visitor characteristics measured in the Basic Data Series caused by sampling and non-responses. Specifically, the data was weighted during analysis to reflect the actual visitor ratio of first-timers to repeat visitors and the proportion of O'ahu only and Neighbor island visitors.

For further information about obtaining visitor data and other sources, contact the Hawai'i Tourism Authority (HTA) at (808) 973-2255.