

2010

# Visitor Satisfaction Monitoring Report

Fourth Quarter  
(October – December)



TOURISM AUTHORITY

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## INTRODUCTION

This monitoring report presents selected preliminary statistics from the fourth quarter of 2010 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 Market Areas (MMA): 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 their 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 [Research@HawaiiTourismAuthority.org](mailto:Research@HawaiiTourismAuthority.org).

## CONDITION OF VISITOR INDUSTRY

In the fourth quarter (October - December) of 2010, a total of 1,748,652 visitors arrived by air to the state, up 13.5 percent compared to the fourth quarter of 2009. Arrivals from U.S. West with 745,202 visitors rose 17.3 percent. Arrivals from U.S. East with 375,713 visitors (+11%), Japan with 319,501 visitors (+4.6%) and Canada with 121,547 visitors (+20.1%) also increased compared to the same quarter last year. The average length of stay for all visitors who came by air to the state was 9.42 days, compared to 9.49 days in the fourth quarter of 2009.

In the fourth quarter of 2010, statewide first-time visitors comprised 33.8 percent of total visitors, virtually unchanged from the fourth quarter of 2009. The share of first-time visitors among U.S. West (18.1%, +0.6 percentage points), U.S. East (40.7%, -0.6 percentage points), Japan (45.5%, -0.9 percentage points) and Canada (35.1%, no

change) were consistent with the fourth quarter of 2009.

For calendar year 2010, total arrivals by air grew 8.8 percent from 2009, to 6,982,572 visitors. Arrivals increased for all top four markets, led by Canada (+14.5%), followed by U.S. West (+8.8%), Japan (+5.3%) and U.S. East (+4.4%). The combined length of stay was stable at 9.34 days.

For all of 2010, statewide first-time visitors comprised 34 percent of total visitors, unchanged from 2009. The share of first-time visitors among U.S. West (19.2%), U.S. East (42.3%), Japan (41.7%) and Canada visitors (37%) were similar to 2009.

## RESULTS

### Visitor Satisfaction Ratings

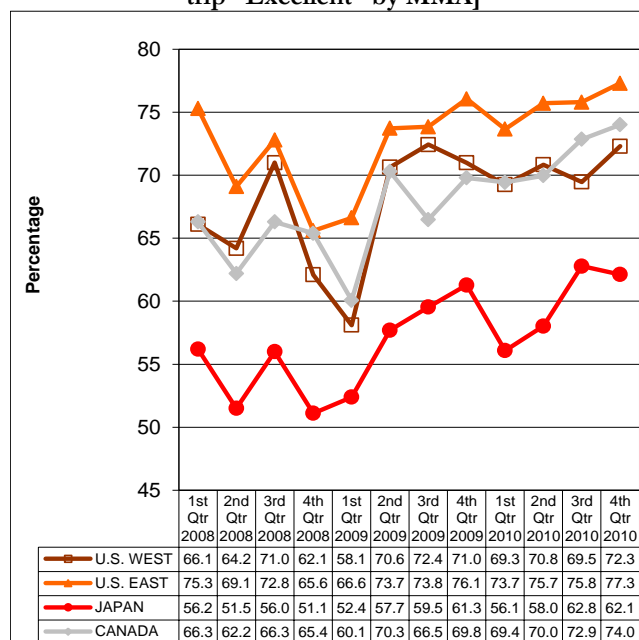
Visitor satisfaction is an important indicator of industry performance. This measure provides vital feedback on how well services are delivered and how well the industry meets expectations. High satisfaction is also a leading indicator of customer retention and loyalty. Satisfying visitors' needs and 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

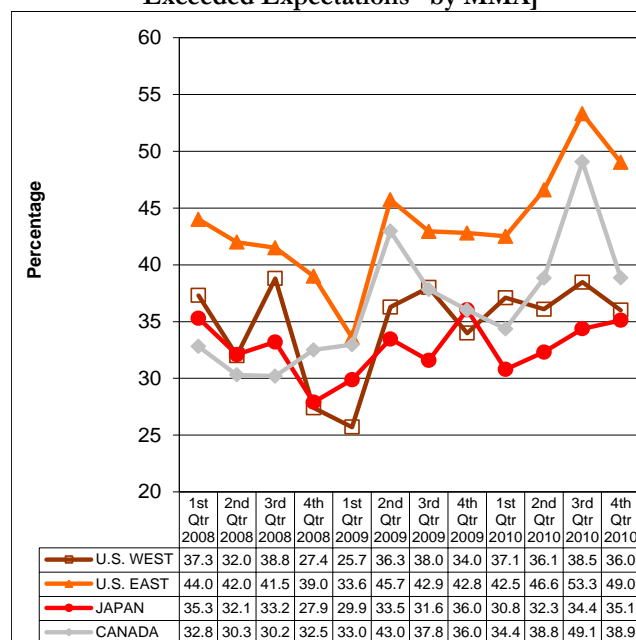
Overall, the majority of visitors in the fourth quarter of 2010, from each major market area continued to rate their most recent trip to Hawai'i as **excellent** (see Figure 1).

- In the fourth quarter of 2010, the percentage of excellent ratings by visitors from U.S. East (77.3%), Canada (74%), U.S. West (72.3%) and Japan (62.1%) were about the same as the fourth quarter of 2009.

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



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



## Exceeded Expectations

The visitors’ evaluation of their 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).

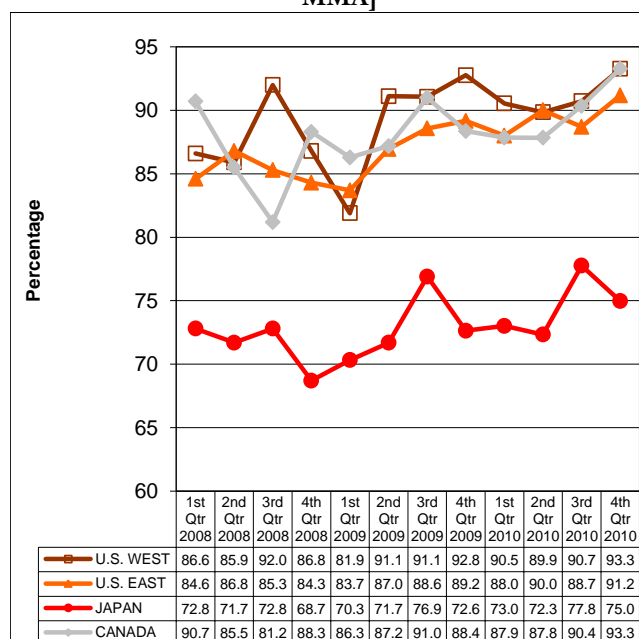
- In the fourth quarter of 2010, the percentage of U.S. East visitors (49%, +6.2 percentage points) who said that their recent trip to Hawai‘i exceeded expectations was higher compared to the same period last year. Ratings from U.S. West (36%), Canada (38.9%) and Japan (35.1%) visitors were consistent with the fourth quarter of 2009.

## 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 responded that they would 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.

- Over 90 percent of U.S. West, U.S. East and Canada visitors, and two-thirds of Japan visitors in the fourth quarter of 2010 stated that they would be very likely to recommend Hawai‘i (see Figure 3).
- Fourth quarter 2010 ratings from U.S. West (93.3%), Canada (93.3%) and U.S. East (91.2%) visitors were the highest in three years among their respective markets.

**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]

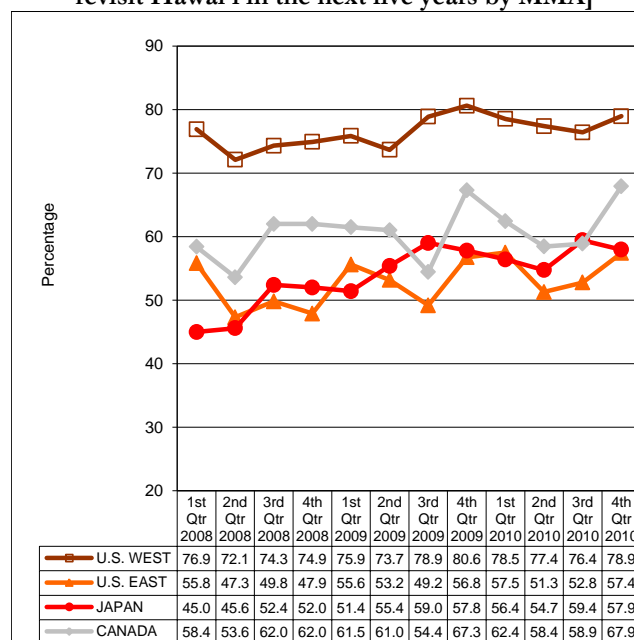


## Likelihood to Revisit Hawai'i

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).

- In the fourth quarter of 2010, the percentage of visitors from U.S. West (78.9%), U.S. East (57.4%), Canada (67.9%), and Japan (57.9%) who said that they were very likely to revisit Hawai'i in the next five years, were similar to responses in the fourth quarter of 2009.

**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]



## Not Likely to Revisit Hawai'i

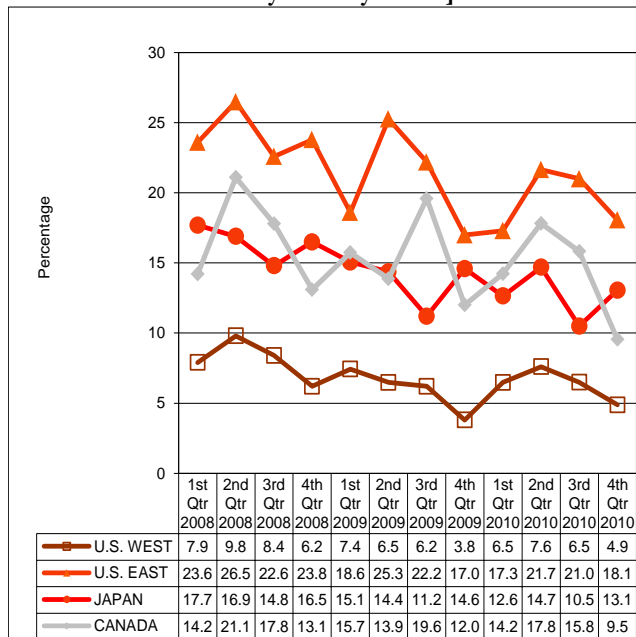
The percentage of respondents who answered that they were *"not too likely"* or *"not at all likely"* to visit Hawai'i in the next five years continued to be fairly low among U.S. West visitors, while moderately higher for U.S. East, Japan and Canada visitors (see Figure 5).

Ratings from each of the four visitor markets in the fourth quarter of 2010 were similar to a year ago.

- Only 4.9 percent of U.S. West visitors in the fourth quarter of 2010 responded that they were not likely to revisit Hawai'i in the next five years.
- Two out of ten U.S. East visitors (18.1%) in the fourth quarter of 2010 responded that they would not likely return to the islands.
- Among Japanese visitors in the fourth quarter of 2010, 13.1 percent responded that they were not likely to revisit Hawai'i.

- In the fourth quarter of 2010, 9.5 percent of Canada visitors said that they would not likely revisit the islands, the lowest percentage in three years.

**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]

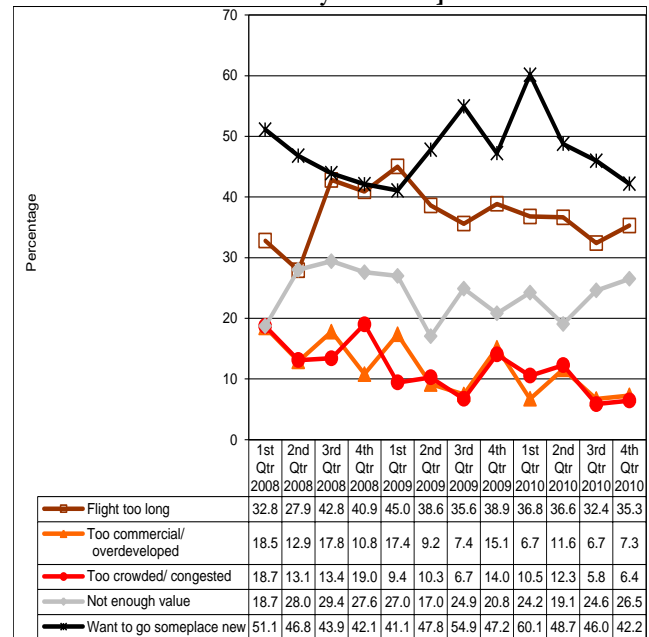


## Reasons for Not Revisiting Hawai'i

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).

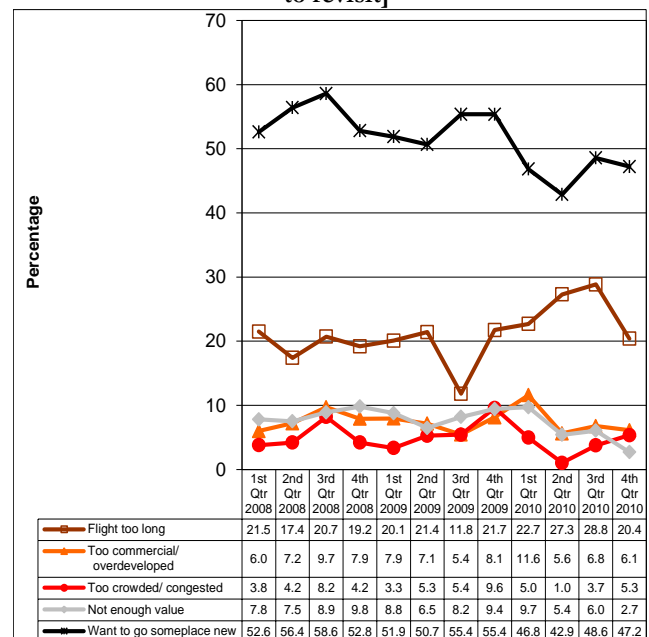
- Among U.S. visitors in the fourth quarter of 2010, 42.2 percent responded that they were not likely to revisit Hawai'i because they want to go someplace new, down 5 percentage points from a year ago (see Figure 6).
- Fewer U.S. visitors in the fourth quarter of 2010 also said that Hawai'i was too commercial/overdeveloped (7.3%, -7.8 percentage points), or too crowded/congested (6.4%, -7.6 percentage points) compared to the fourth quarter of 2009.

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



- More U.S. visitors in the fourth quarter of 2010 (26.5%, +5.7 percentage points) said that Hawai'i did not provide enough value.

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



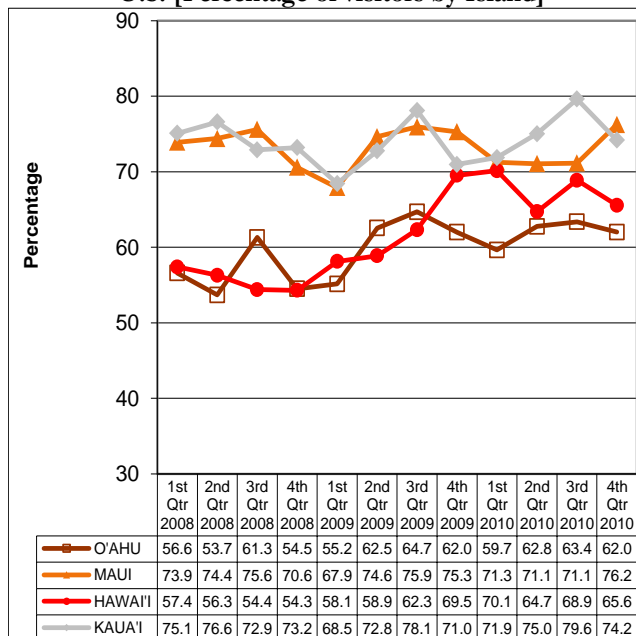


- Among Japan visitors in the fourth quarter of 2010, fewer said that they want to go someplace new (47.2%, -8.2 percentage points) compared to the same quarter last year (see Figure 7).
- Similar to a year ago, two out of ten Japan visitors in the fourth quarter of 2010 thought that the flight was too long (20.4%).
- Only 2.7 percent of Japan visitors in the fourth quarter of 2010 said that Hawai'i did not provide enough value, the lowest percentage in three years.

## 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]

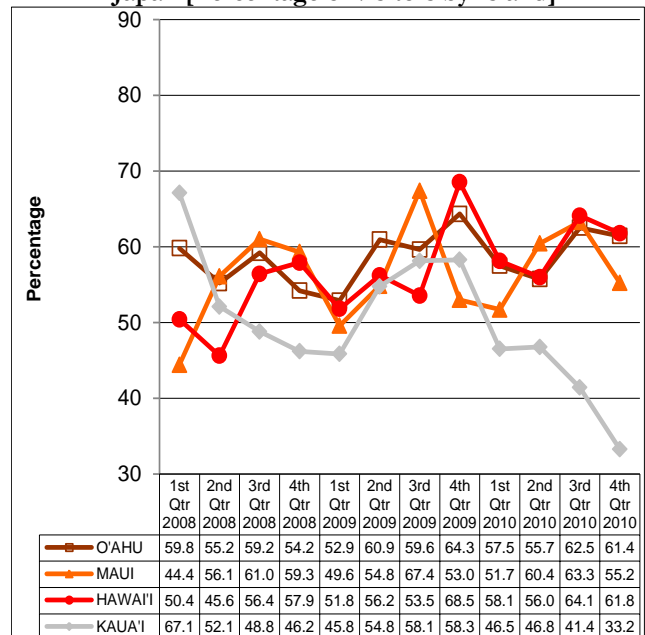


- Up until the third quarter of 2009, excellent ratings by U.S. visitors on Maui or Kaua'i were distinctively higher than excellent ratings on O'ahu or Hawai'i Island. However, in the first and third quarters of 2010, Hawai'i Island

ratings have improved significantly to be almost as high as Maui's ratings (see Figure 8).

- Fourth quarter 2010 rating for Hawai'i Island (65.6%, -3.9 percentage points) was similar to the same period last year.
- U.S. visitors' excellent ratings for Maui (76.2%) and Kaua'i (74.2%) in the fourth quarter of 2010, were about the same as the fourth quarter of 2009.
- The share of U.S. visitors in the fourth quarter of 2010 who rated O'ahu excellent (62%) was unchanged from a year ago.

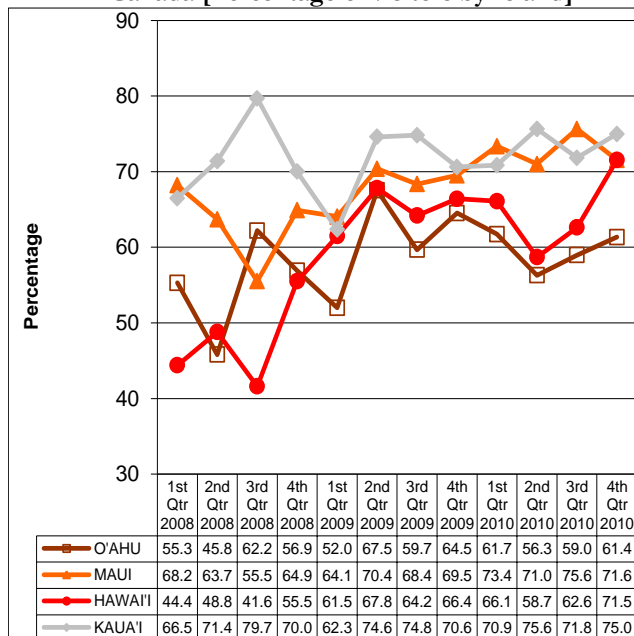
Figure 9: Island Experience Rated as Excellent – Japan [Percentage of visitors by Island]



- Significantly fewer Japan visitors in the fourth quarter of 2010 gave **excellent** ratings to Kaua'i (33.2%, -25.1 percentage points) (see Figure 9), rather, more rated Kaua'i **above average** (58%, +28 percentage points) compared to the fourth quarter of 2009.
- Hawai'i Island **excellent** ratings from Japan visitors in the fourth quarter of 2010 (61.8%) decreased 6.7 percentage points from the same quarter last year.

- Fourth quarter 2010 ratings for O‘ahu (61.4%) and Maui (55.2%) from Japan visitors were about the same compared to a year ago.

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



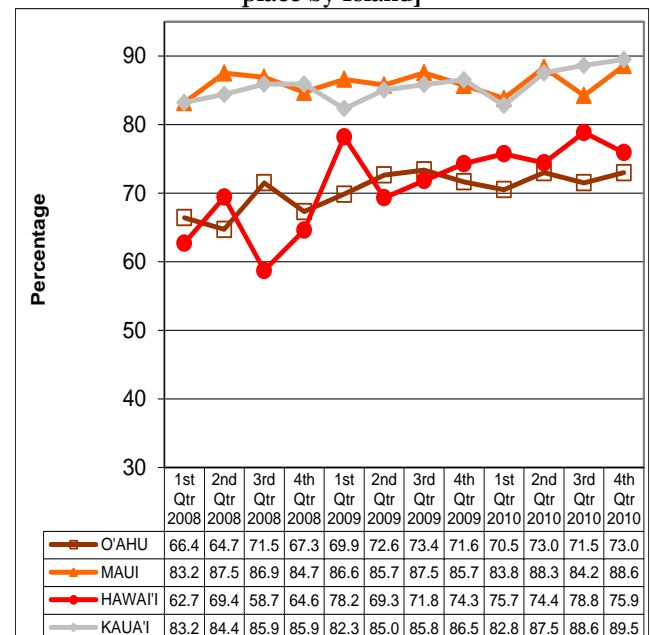
- Among visitors from Canada, Maui and Kaua‘i scored distinctively higher in the first, second and third quarters of 2010 compared to O‘ahu and Hawai‘i Island. However, Hawai‘i Island’s ratings caught up to Maui’s ratings in the fourth quarter of 2010 (see Figure 10).
- Fourth quarter 2010 ratings by Canada visitors for Kaua‘i (75%), Maui (71.6%), Hawai‘i Island (71.5%) and O‘ahu (61.4%) were about the same as the fourth quarter of 2009.

## 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.

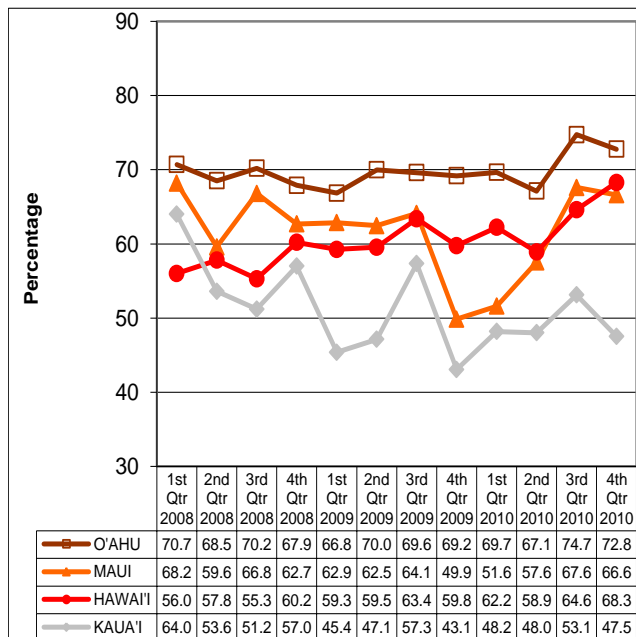
- U.S. visitors continued to be more likely to recommend Maui or Kaua‘i over O‘ahu or Hawai‘i Island (see Figure 11).

**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]**



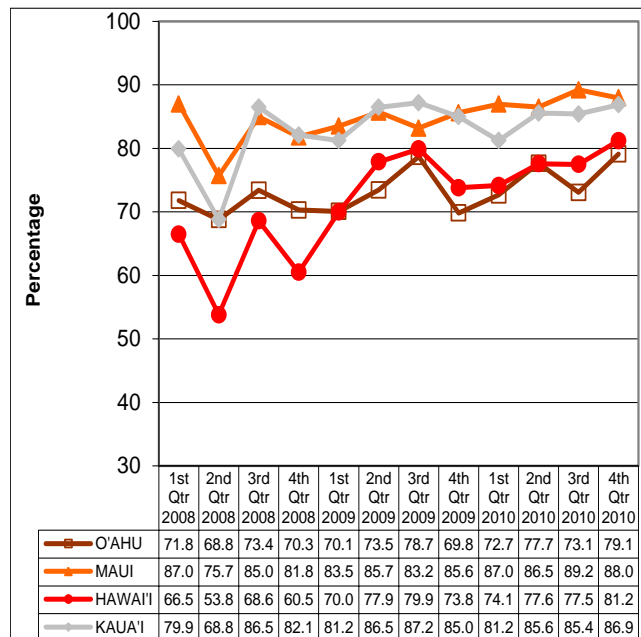
- Fourth quarter 2010 ratings by U.S. visitors for Kaua‘i (89.5%), Maui (88.6%), Hawai‘i Island (75.9%) and O‘ahu (73%) were similar to the fourth quarter of 2009.
- Kaua‘i’s ratings by U.S. visitors (89.5%) in fourth quarter of 2010 were the highest since the second quarter of 2007 (89.7%).

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 continued to be more likely to recommend O'ahu over the other islands. Fourth quarter 2010 rating of 72.8 percent was about the same as last year (see Figure 12).
- Maui's ratings by Japan visitors increased significantly (+16.7 percentage points) from a year ago to 66.6 percent in the fourth quarter of 2010.
- Japan visitors' ratings for Hawai'i Island improved 8.5 percentage points to a high of 68.3 percent in the fourth quarter of 2010.
- More Japan visitors in the fourth quarter of 2010 (47.5%) were very likely to recommend Kaua'i compared to the fourth quarter of 2009 (43.1%).

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



- Canada visitors continued to be more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (see Figure 13).
- Canada visitors' fourth quarter 2010 ratings for O'ahu rose 9.3 percentage points from a year ago to 79.1 percent.
- Hawai'i Island's ratings by Canada visitors in the fourth quarter of 2010 improved 7.4 percentage points to 81.2 percent.

## Attributes of Each Island

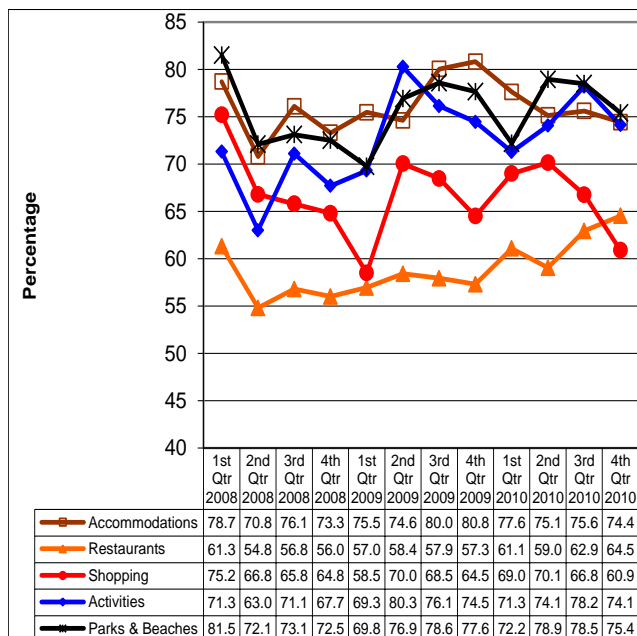
Analysis of the visitors' satisfaction with the specific attributes, activities, and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction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

- In the fourth quarter of 2010, parks and beaches (75.4%) were the highest rated attribute among U.S. visitors on O'ahu, followed by accommodations (74.4%) and



activities and attractions (74.1%) (see Figure 13).

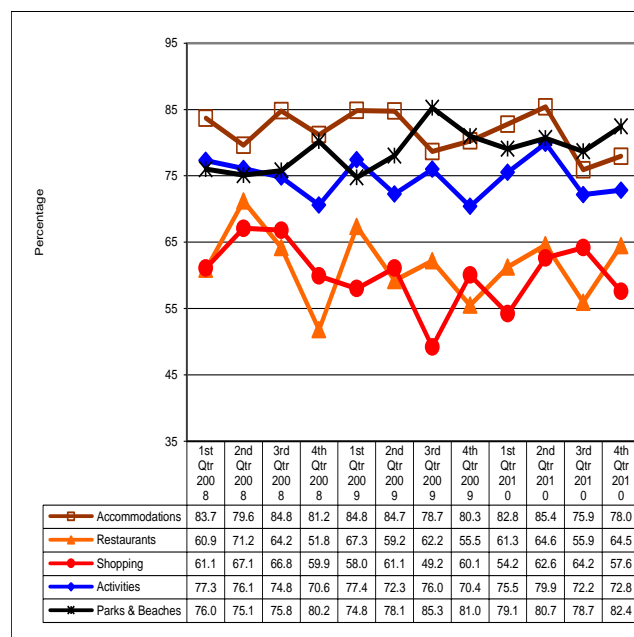
**Figure 14: Detailed Satisfaction Ratings for U.S. Visitors to O'ahu [Percentage of U.S. visitors to O'ahu who were "Very Satisfied" with Attribute]**



- Among U.S. visitors who gave high marks to O'ahu's parks and beaches, two out of three were very satisfied with the facilities (67.5%), cleanliness and comfort (66.9%), and security (63.1%).
- U.S. visitor ratings for accommodations on O'ahu declined 6.4 percentage points from the fourth quarter of 2009. Among those who were very satisfied with O'ahu's accommodations, 79.9 percent were very satisfied with the locations; seven out of ten visitors were very satisfied with cleanliness and comfort (73.5%), service (73.2%), and facility (69.9%); and 63 percent were very satisfied with the value for the money.
- Among those who were very satisfied with O'ahu's activities and attractions in the fourth quarter of 2010, seven out of ten U.S. visitors were very satisfied with the variety (76.4%), excitement (69.9%) and service (71.9%); while 51.3 percent were very satisfied with the value.

- Up to the third quarter of 2010, restaurants on O'ahu were the lowest rated attribute among U.S. visitors. However in the fourth quarter of 2010, the percentage of U.S. visitors who were very satisfied with O'ahu's restaurants improved 7.2 percent points to 64.5 percent, surpassing ratings for shopping on O'ahu. Two out of three U.S. visitors in the fourth quarter of 2010 were very satisfied with the locations (72.1%), variety (67.8%), service (66.9%) and quality (64.9%) of O'ahu restaurants but only 45.6 percent felt that there was value for the money.
- U.S. visitor ratings for shopping on O'ahu (60.9%) was the lowest rated attribute in the fourth quarter of 2010. Two out of three U.S. visitors were very satisfied with the sufficient shopping places (70.8%), locations (65.4%), variety (62.4%) and service (64.8%); 52 percent were very satisfied with the quality; but only 41.8 percent felt there was value for the money.

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

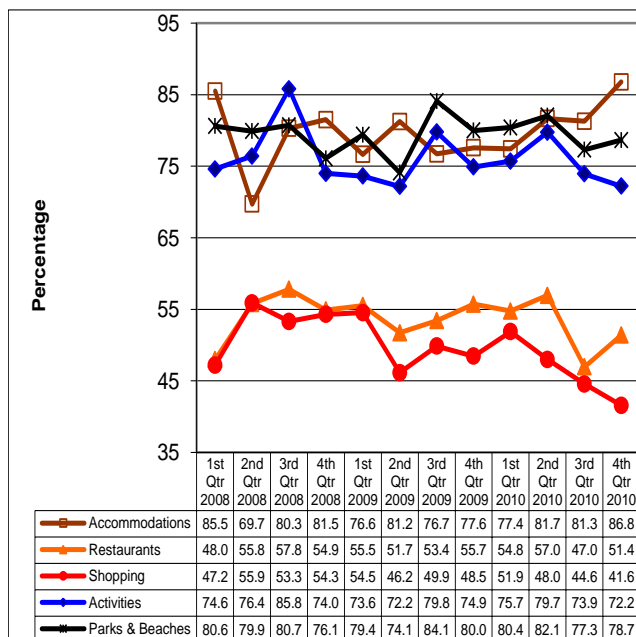


- In the fourth quarter of 2010, parks and beaches (82.4%) were the highest rated

attribute among U.S. visitors on Maui, followed by accommodations (78%), activities (72.8%), restaurants (64.5%) and shopping (57.6%) (see Figure 15).

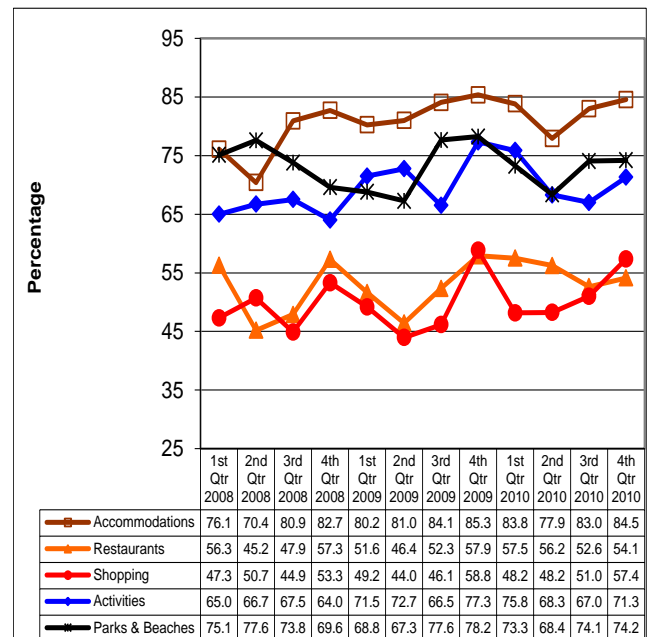
- Ratings on restaurants improved 9 percentage points from the fourth quarter of 2009. Two out of three U.S. visitors in the fourth quarter of 2010 were very satisfied with the locations (71.5%), service (67.1%), quality (66.7%) and variety (59.3%) of Maui's restaurants but only 36 percent felt that 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]**



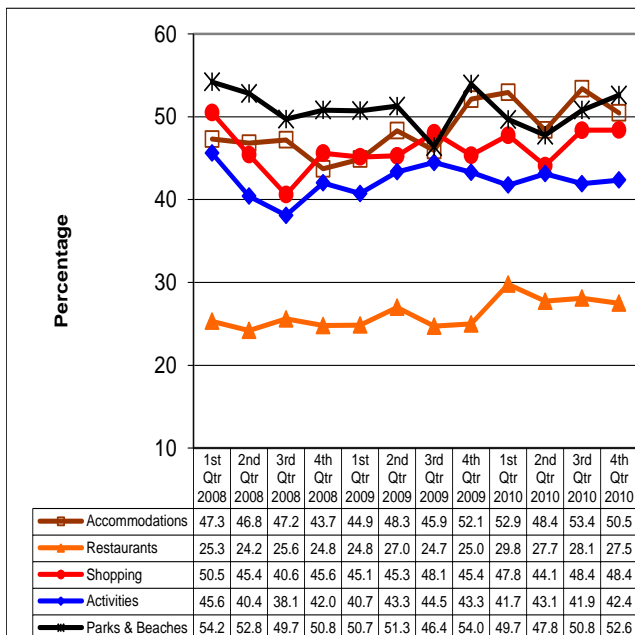
- Accommodations (86.8%) were the highest rated attribute among U.S. visitors on Kaua'i in the fourth quarter of 2010, followed by parks and beaches (78.7%), activities (72.2%), restaurants (51.4%) and shopping (41.6%) (see Figure 16).
- Ratings on accommodations rose 9.2 percentage points; but ratings on shopping declined 6.9 percentage points from the fourth quarter of 2009.

**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]**



- In the fourth quarter of 2010, accommodations (84.5%) were the highest rated attribute among U.S. visitors on Hawai'i Island, virtually unchanged from a year ago (see Figure 17).
- Parks and beaches were the second highest rated attribute in the fourth quarter of 2010 at 74.2 percent (-4 percentage points).
- Ratings on Hawai'i Island's activities declined 6 percentage points to 71.3 percent in the fourth quarter of 2010.
- Similar to Kaua'i and Maui, U.S. visitors' ratings were much lower for Hawai'i Island's restaurants (54.1%) and shopping (57.4%). Ratings for restaurants and shopping in the fourth quarter of 2010 were similar to the same quarter last year.

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



- In the fourth quarter of 2010, ratings for all attributes by Japan visitors on O'ahu were about the same compared to a year ago (see Figure 18).
- Parks and beaches were the highest rated attribute at 52.6 percent. Among Japan visitors who were very satisfied with O'ahu's parks and beaches, four out of ten were very satisfied with the security (45.9%), and cleanliness and comfort (40.3%), while 36.6 percent of the visitors were very satisfied with the facilities.
- O'ahu's accommodations (50.5%) were the second highest rated attribute. Six out of ten Japan visitors were very satisfied with the location (57.4%). Four out of ten Japan visitors were very satisfied with the cleanliness and comfort (41.5%), and value for the money (39%); while one out of three visitors were very pleased with the service (32.9%) and facility (30.5%).
- Shopping (48.4%) was the third highest rated attribute among Japan visitors to O'ahu in the fourth quarter of 2010. Six out of ten Japan visitors felt there were sufficient shopping

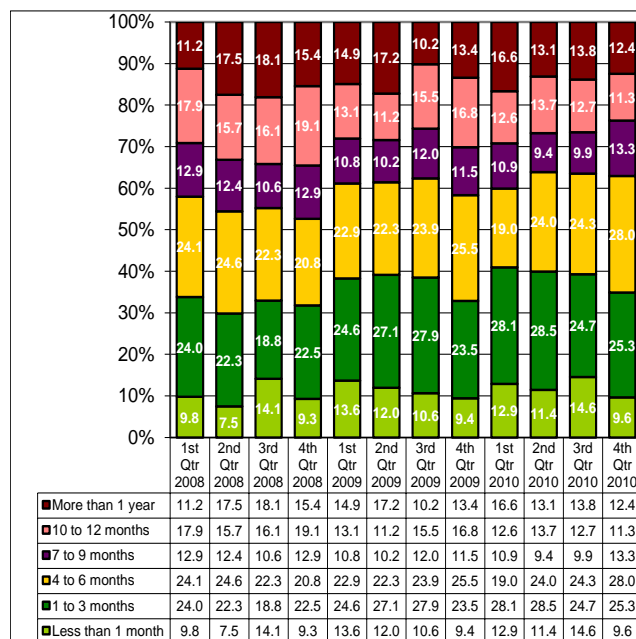
places; five out of ten were very satisfied with the locations (47.5%) and variety (45.3%); but only one out of three visitors were very satisfied with the service (32.9%), quality (30%), or felt there was value for the money (34.8%).

- Restaurants continued to be rated significantly lower compared to the other attributes. In the fourth quarter of 2010, only 27.5 percent of Japan visitors were very satisfied with restaurants on O'ahu. About a third of Japan visitors were very satisfied with the locations (35.6%); a quarter were very satisfied with the variety (27.2%), service (26%) and quality (23.6%); while only 19.4 percent were very pleased with the value.

## Trip Planning Cycle

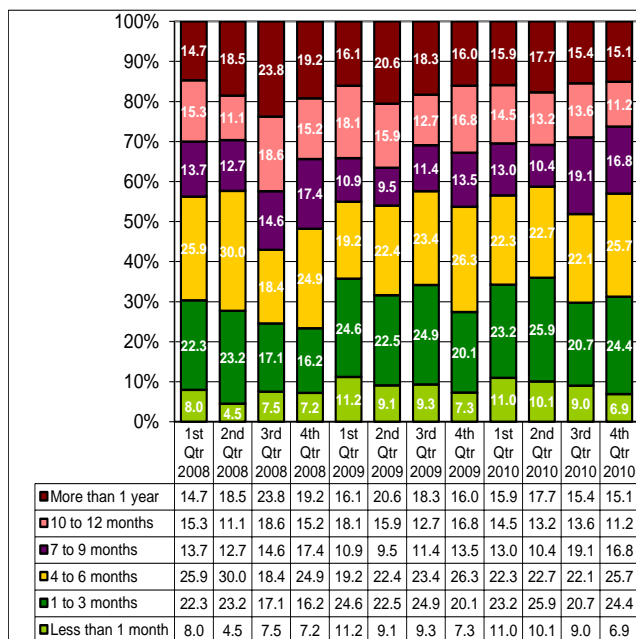
Information on how visitors plan their trips and when they make major decisions can greatly enhance preparation of effective marketing and promotion plans.

**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 or more months before arriving.
- The percentage of U.S. West visitors who decided to visit Hawai'i (65%) four or more months before departure, in the fourth quarter of 2010 were similar to the fourth quarter of 2009 (67.2%) (see Figure 19).
- Three out of four U.S. West visitors in the fourth quarter of 2010 purchased package tours (72.2%) less than one month before departure. Seven out of ten made rental car reservations (68.3%) within three months or less. Three out of four U.S. West visitors made accommodation reservations (74.7%) six months or less before their visit.

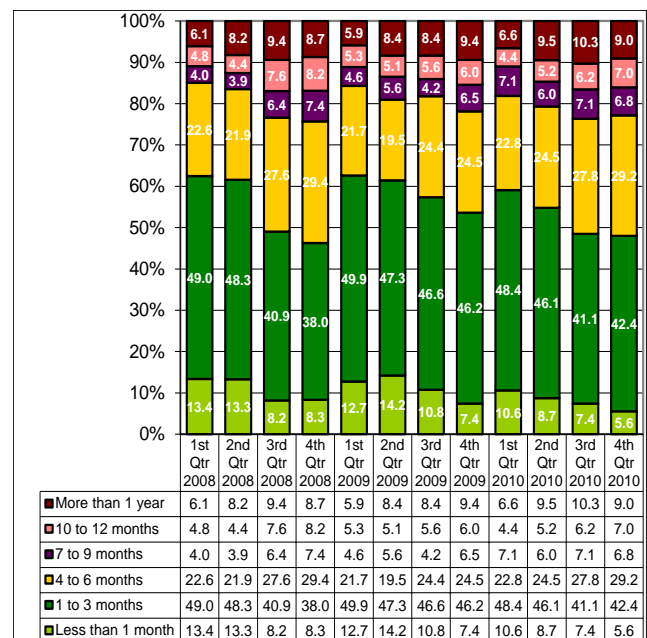
**Figure 20: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]**



- Two out of three U.S. East visitors in the fourth quarter of 2010 decided to visit Hawai'i (66.9%) one to nine months before departure, up 7 percentage points from the fourth quarter of 2009 (see Figure 20).
- Three out of four U.S. East visitors in the fourth quarter of 2010 made accommodation

reservations (73.2%) six months or less before coming to the islands. Two out of three U.S. East visitors made rental car reservations (63.3%) three months or less prior to arriving. The majority of U.S. East visitors purchased packaged tours (67.9%) 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]**

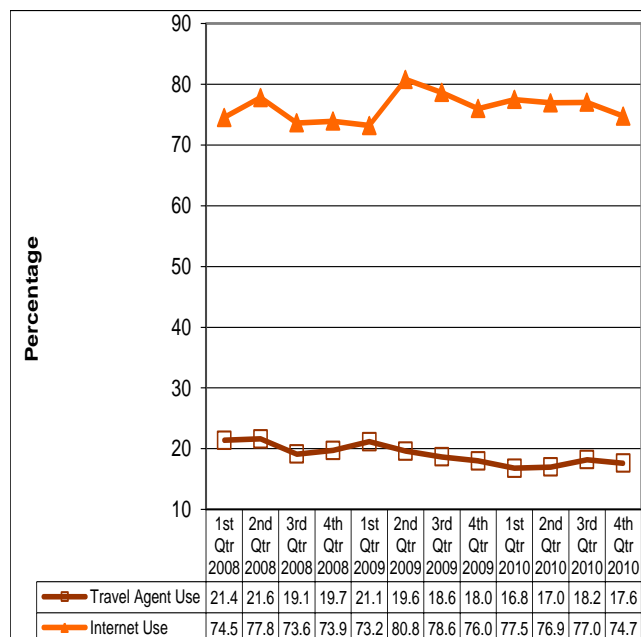


- About half of Japan visitors in the fourth quarter of 2010 decided to visit Hawai'i (48%) three months or less before departure, down 5.6 percentage points from the fourth quarter of 2009 (see Figure 21).
- Seven out of ten Japan visitors in the fourth quarter of 2010 made accommodations reservations (71.4%) three months or less before departure. Close to 90 percent of Japan visitors made rental car reservations within three months before coming to the islands. Six out of ten Japan visitors purchased packages (57.9%) less than one month before their arrival.

## Internet and Travel Agent Use

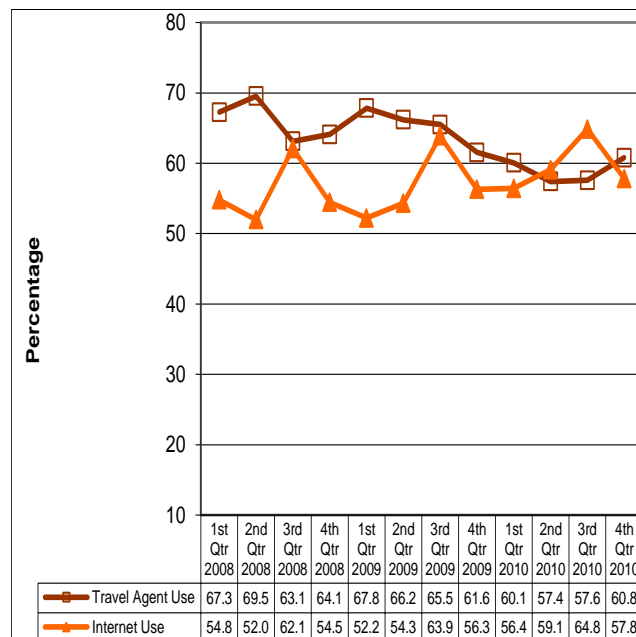
The use of the Internet or a travel agent for trip planning and booking differs between U.S. and Japanese travelers to Hawai'i.

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



- Three out of four U.S. visitors (74.7%) in the fourth quarter of 2010 used the Internet for trip planning purposes while 17.6 percent of U.S. visitors used travel agents. These percentages were consistent with the fourth quarter of 2009 (see Figure 22).
- Over the last two years, travel agent usage among Japan visitors had been declining while Internet usage had been gaining popularity. In the second (59.1%) and third (64.8%) quarters of 2010, Internet usage exceeded travel agent usage. However, in the fourth quarter 2010, a higher percentage of Japan visitors used travel agents (60.8%) than the Internet (57.8%) (see Figure 23).

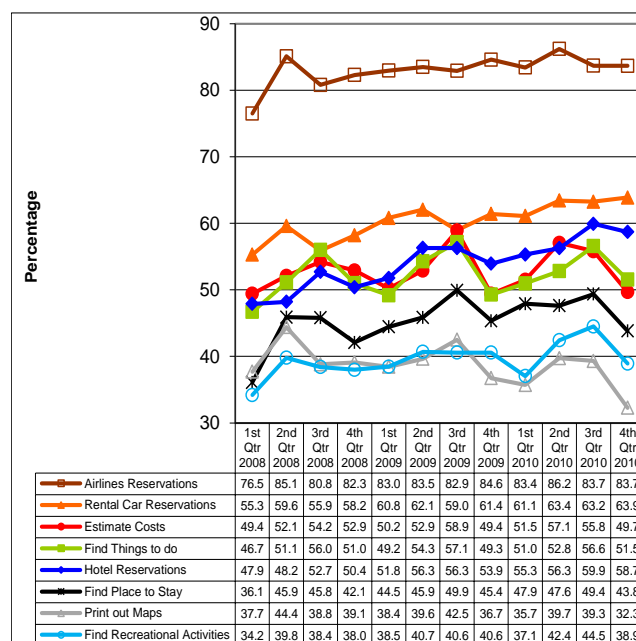
**Figure 23: Internet and Travel Agent Use – Japan**  
[Percentage of Japan visitors]



## Internet Use

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

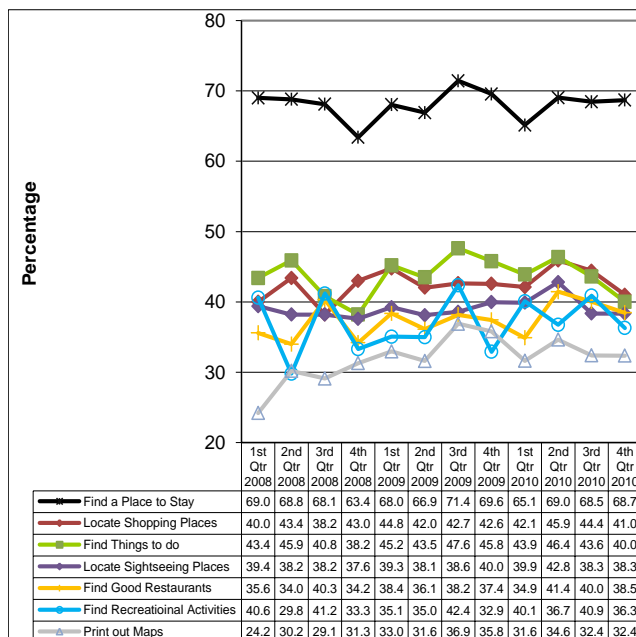
**Figure 24: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]**





- Of the 74.7 percent of U.S. visitors who used the Internet in the fourth quarter of 2010, 83.7 percent (62.5% 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 2009 (84.6%, or 64.3% of all U.S. visitors) (see Figure 24).
- Making car reservations continued to be the second most popular usage of the Internet among U.S. visitors. In the fourth quarter of 2010, 63.9 percent made rental car reservations (47.7% of all U.S. visitors), consistent with the previous year.
- Over half of U.S. visitors in the fourth quarter of 2009 made hotel reservations on the Internet (58.7% ,or 43.9% of all U.S. visitors), up from 53.9 percent in the fourth quarter of 2009.
- Similar percentages of U.S. visitors in the fourth quarter of 2010 used the Internet to find things to do (51.5%) and estimate costs (49.7%).

**Figure 25: Internet Use – Japan [Percentage of Japan visitors who used the Internet]**

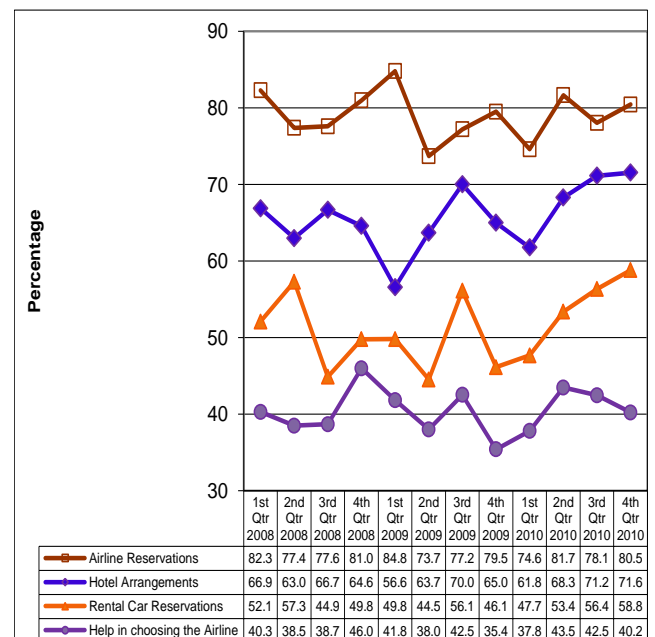


- Of the 57.8 percent of Japan visitors who used the Internet in the fourth quarter of 2010, 68.7 percent (39.7% of all Japan visitors) used it to find a place to stay, comparable to the fourth quarter of 2009 (see Figure 25).
- Four out of ten Japan visitors in the fourth quarter of 2010 used the Internet to locate shopping places (41%, or 23.7% of all Japan visitors) and find things to do (40%, or 23.1% of all Japan visitors).
- Close to 38 percent of Japan visitors used the Internet to find good restaurants and locate sightseeing places.

## Travel Agent Use

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

**Figure 26: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]**



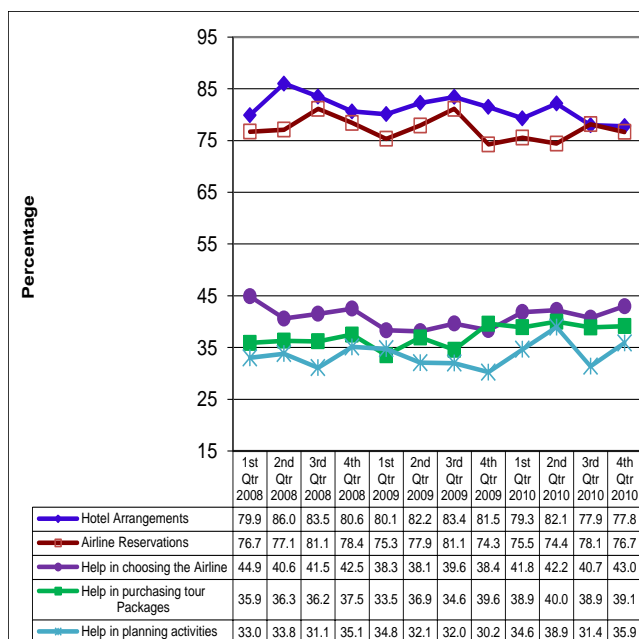
- U.S. visitors mainly used travel agents to make airline reservations. Of the 17.6 percent of U.S. visitors who used a travel agent in the fourth quarter of 2010, 80.5 percent (14.2% of all U.S. visitors) made airline reservations. The



proportion was about the same as the fourth quarter of 2009 (see Figure 26).

- The second most popular use of travel agents among U.S. visitors in the fourth quarter of 2010 was to make hotel arrangements (71.6%, or 12.6% of all U.S. visitors). This was higher compared to the fourth quarter of 2009 (65%, or 11.7% of all U.S. visitors).
- In the fourth quarter of 2010, a significantly higher percentage of U.S. visitors used travel agents to make rental car reservations (58.8%, or 10.4% of all U.S. visitors), compared to the fourth quarter of 2009 (46.1%, or 8.3% of all U.S. visitors).

**Figure 27: Use of Travel Agent – Japan [Percent of Japan visitors who used a Travel Agent]**



- The top two uses of travel agents by Japan visitors in the fourth quarter of 2010 continued to be hotel arrangements (77.8%, or 47.3% of all Japan visitors); and for airline reservations (76.7%, or 46.6% of all Japan visitors). These proportions were similar to the fourth quarter of 2009 (Figure 27).

## 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 2010 survey has 8 pages and 33 questions.

**Table 1: Sample Size  
October - December 2010**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	2,835	1,160	40.9%	+/- 2.21
U.S.	4,234	1,178	27.8%	+/- 2.43
Canada	2,110	641	30.4%	+/- 3.23

Due to the low number of samples achieved, data for Lānaʻi and Molokaʻi were not presented 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.