



2011

Visitor Satisfaction
Monitoring Report

First - Second Quarter
(January – June)

HAWAII TOURISM

AUTHORITY

Hawai'i Convention Center
1801 Kalakaua Avenue
Honolulu, Hawai'i 96815
(808) 973-2255
www.hawaii tourism authority.org

INTRODUCTION

This monitoring report presents selected preliminary statistics from the first and second quarters of the 2011 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 their 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, contact the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email research@hawaiiitourismauthority.org.

CONDITION OF VISITOR INDUSTRY

Total visitor arrivals by air in the first quarter of 2011 rose 8.7 percent; while total visitor arrivals in the second quarter of 2011 was about the same (+0.5%) compared to the first and second quarters of 2010. These results included the impact of the devastating earthquake and tsunami that struck Japan on March 11, 2011.

In the first quarter (January - March) of 2011, a total of 1,780,458 visitors flew to the state. Arrivals from Canada, with 185,727 visitors, increased significantly (+19.9%). U.S. West arrivals increased 8.7 percent to 667,393 visitors, while U.S. East arrivals rose 8.9 percent to 445,331 visitors. Japan arrivals declined 1.4 percent to 297,265 visitors. The average length of stay for all visitors to the state was 9.97 days, compared to 9.76 days in the first quarter of 2010.

A total of 1,723,497 visitors came by air in the second quarter (April - June) of 2011. Arrivals from Japan declined 17.6 percent to 229,744 visitors. U.S. East arrivals also dropped (-2.5%) to 412,415 visitors. These decreases were offset by growth in arrivals from Canada (+23% to 84,233 visitors) and U.S. West (+1.7% to 787,164 visitors). The average length of stay for all visitors to the state was 9.24 days, compared to 9.09 days in the second quarter of 2010.

For the first half of 2011, total arrivals by air increased 4.5 percent, from year-to-date 2010, to 3,503,955 visitors. Arrivals increased for Canada (+20.9%), U.S. West (+4.8%) and U.S. East (+3.1%), but arrivals from Japan declined by 9.2 percent. The combined length of stay increased to 9.54 days, from 9.35 days in the first half of 2010.

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

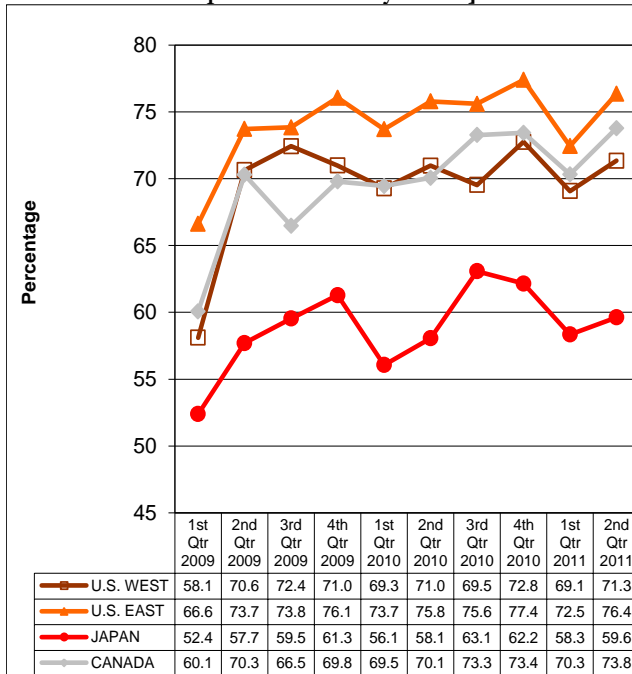
The majority of visitors from the top four MMAs continued to give *excellent* marks for their overall experience in Hawai'i (see Figure 1).

- Close to 70 percent of U.S. West, U.S. East and Canada visitors, and nearly 60 percent of Japan visitors in the first and second quarters of 2011, rated their most recent trip to Hawai'i as *excellent*. These percentages were consistent with excellent ratings from all

four visitor markets in the first and second quarters of 2010.

- Over the past two years, excellent ratings by U.S. West, U.S. East, Japan and Canada visitors in the first quarter were lower than excellent ratings in the other three quarters.

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



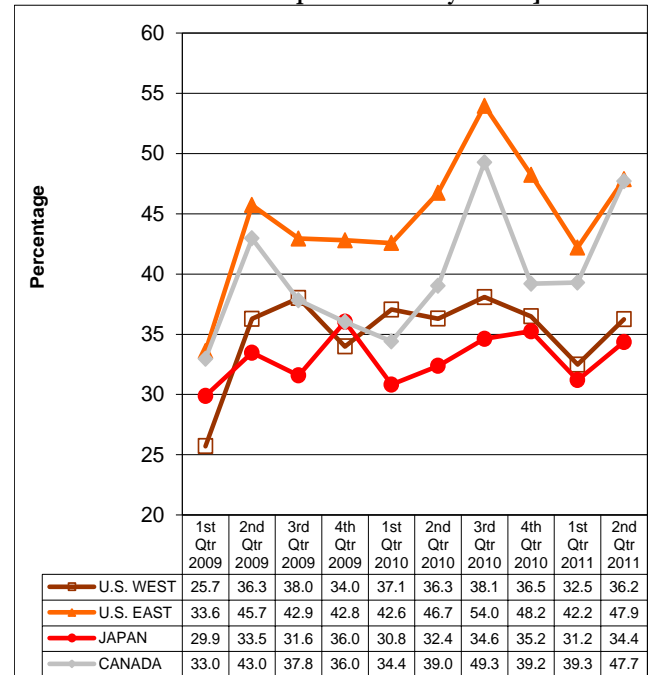
- When compared to the first quarter of 2009, excellent ratings in the first quarter of 2011 increased significantly from U.S. West (+11 percentage points) and Canada (+10.2 percentage points) visitors; and increased moderately from Japan (+5.9 percentage points) and U.S. East (+5.9 percentage points) visitors. Excellent ratings from all four MMAs in the second quarter of 2011 were similar to ratings in the second quarter of 2009.

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).

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



- Since 2009, first quarter ratings of exceeded expectations by U.S. East, Japan and Canada visitors were lower compared to ratings in the second, third and fourth quarters.
- The percentage of Canadian visitors who said their recent trip to Hawai'i exceeded expectations increased in the first (+4.9 percentage points to 39.3%) and second (+8.7 percentage points to 47.7%) quarters of 2011, compared to the same quarters in 2010.
- U.S. West visitor ratings in the first quarter of 2011(-4.6 percentage points to 32.5%) were lower; while second quarter 2011 ratings were unchanged compared to the first and second quarters of 2010.
- The percentages of U.S. East and Japan visitors in the first and second quarters of 2011, who said their trip to Hawai'i exceeded expectations, were about the same compared to the first and second quarters of 2010.

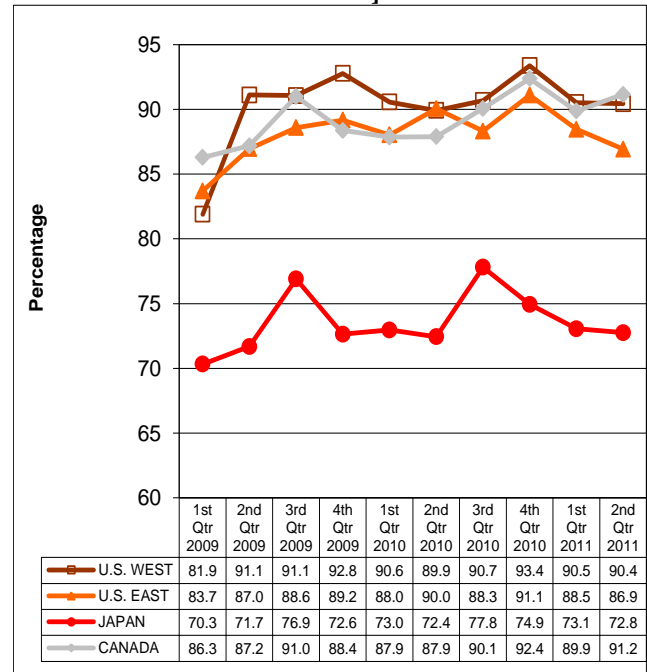
- When compared to the first quarter of 2009, a higher percentage of U.S. East (+8.6 percentage points), U.S. West (+6.8 percentage points) and Canada (+6.3 percentage points) visitors in the first quarter of 2011 said that their recent trip to the islands exceeded expectations. Ratings from all four MMAs in the second quarter of 2011 were about the same as ratings in the second 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 the past few years, seven out of ten Japan visitors, and nine out of ten U.S. West, U.S. East and Canada visitors stated that they would be very likely to recommend Hawai'i (see Figure 3).
- Ratings in the first and second quarters of 2011 from U.S. West, U.S. East, Japan and Canada visitors were consistent with the respective ratings in the first and second quarters of 2010.
- When compared to the first quarter of 2009, a higher percentage of U.S. West (+8.6 percentage points) and U.S. East (+4.8 percentage points) visitors in the first quarter of 2011 said that they would very likely recommend Hawai'i. Ratings from all four MMAs in the second quarter of 2011 were consistent with ratings in the second quarter of 2009.

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]



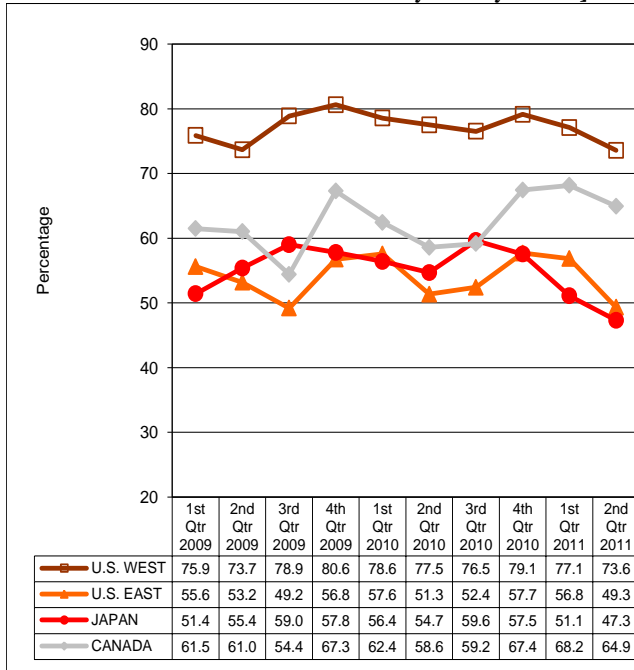
Likelihood to Revisit Hawai'i

A visitor's decision to return to Hawai'i is influenced by positive experiences on their 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).

- Compared to the first and second quarters of 2010, more Canada visitors in the first (+5.8 percentage points to 68.2%) and second (+6.3 percentage points to 64.9%) quarters of 2011 said they were very likely to revisit Hawai'i in the next five years.
- A lower percentage of Japan visitors in the first (-5.3 percentage points to 51.1%) and second (-7.4 percentage points to 47.3%) quarters of 2011 were very likely to revisit

Hawai'i, compared to the first and second quarters of 2010.

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]



- There were no significant differences in ratings from U.S. West and U.S. East visitors in the first and second quarters of 2011 compared to the first and second quarters of 2010.
- When compared to the first quarter of 2009, a higher percentage of Canada visitors (+6.7 percentage points) in the first quarter of 2011 said that they would very likely revisit Hawai'i.
- The percentage of Japan visitors in the second quarter of 2011 who would very likely revisit Hawai'i were lower (-8.1 percentage points) compared with ratings in the second quarter of 2009.

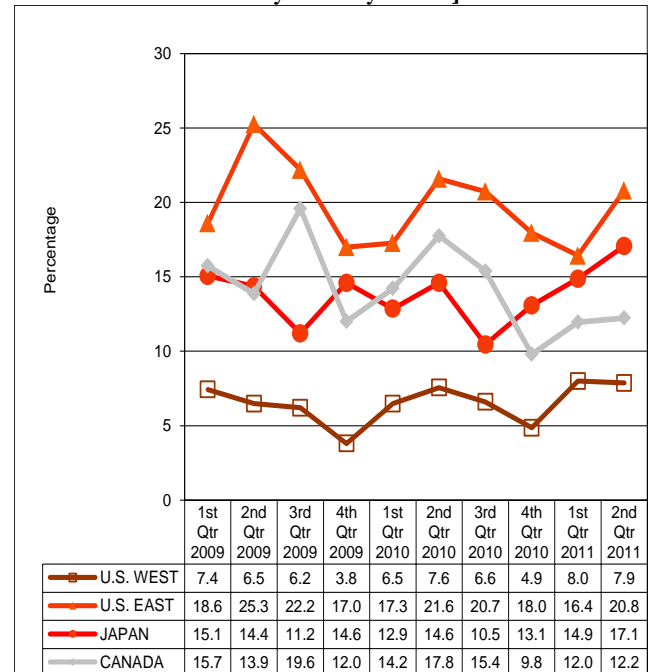
Not Likely to Revisit Hawai'i

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).

- Similar to previous years, only about eight percent of U.S. West visitors in the first and second quarters of 2011 responded that they were not likely to revisit Hawai'i in the next five years.
- Two out of ten U.S. East visitors in the first (16.4%) and second (20.8%) quarters of 2011 responded that they were not likely return to the islands, consistent with the first and second quarters of 2010.

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]



- Among Japanese visitors in 2011, 14.9 percent in the first quarter, and 17.1 percent in the second quarter responded that they were not likely to revisit Hawai'i. The percentage in the second quarter of 2011 was the highest since the second quarter of 2007 (17.1%).
- Over the past few years, the percentages of Canada visitors not likely to revisit Hawai'i had been slowly declining to 12 percent in the

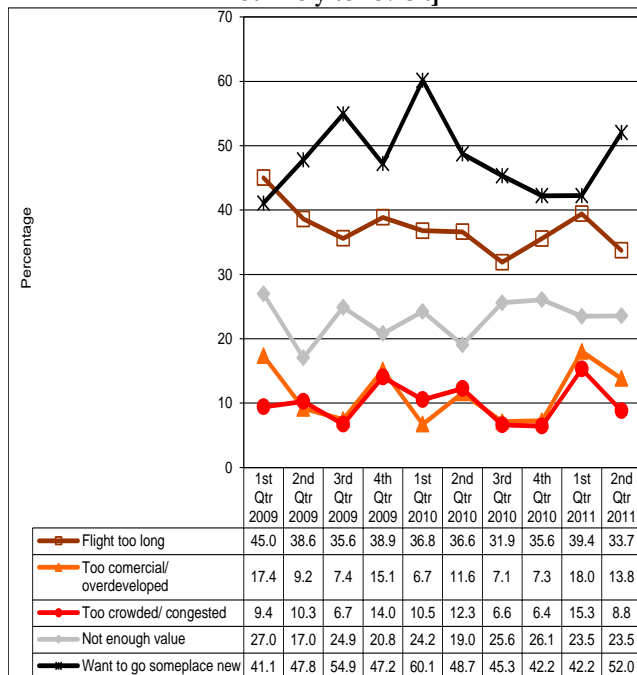
first quarter, and 12.2 percent in the second quarter of 2011.

Reasons for Not Revisiting Hawai'i

Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were *"not likely to revisit Hawai'i"* (from previous section).

- Among U.S. visitors in 2011, 42.2 percent in the first quarter, and 52 percent in the second quarter were not likely to revisit Hawai'i because they want to go someplace new. The percentage in the first quarter of 2011 was much lower than the first quarter of 2010 (-17.9 percentage points), while the percentage in the second quarter of 2011 was similar to the second quarter of 2010 (see Figure 6).

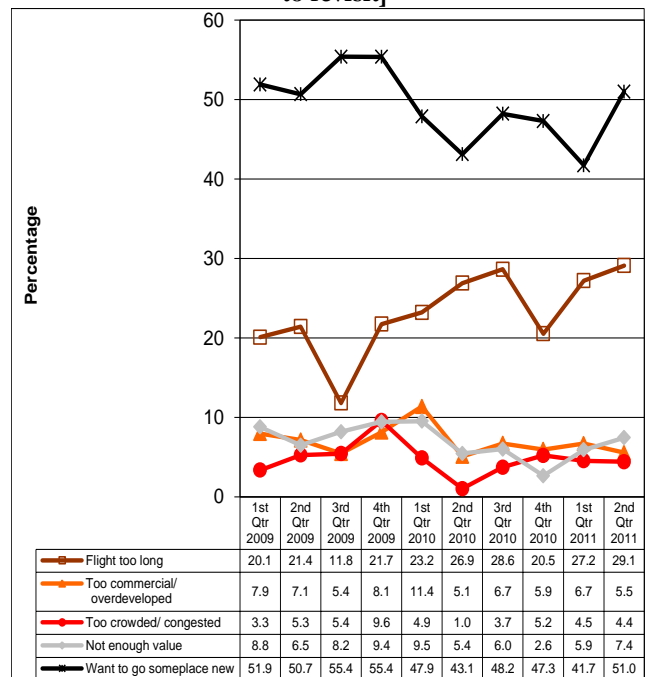
Figure 6: Reasons for Not Revisiting Hawai'i - U.S. [Percentage of visitors who were not likely to revisit]



- Similar to last year, 39.4 percent of U.S. visitors in the first quarter of 2011, and 33.7 percent in the second quarter of 2011, said that the flight was too long.

- The share of U.S. visitors in the first quarter of 2011 who said that Hawai'i did not provide enough value (23.5%) was about the same as the first quarter of 2010. The proportion for the second quarter of 2011 (23.5%) rose 4.5 percentage points from the second quarter of 2010.
- Significantly more U.S. visitors in the first quarter of 2011 said that Hawai'i was too commercial/overdeveloped (+11.3 percentage points to 18%) compared to the first quarter of 2010.

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



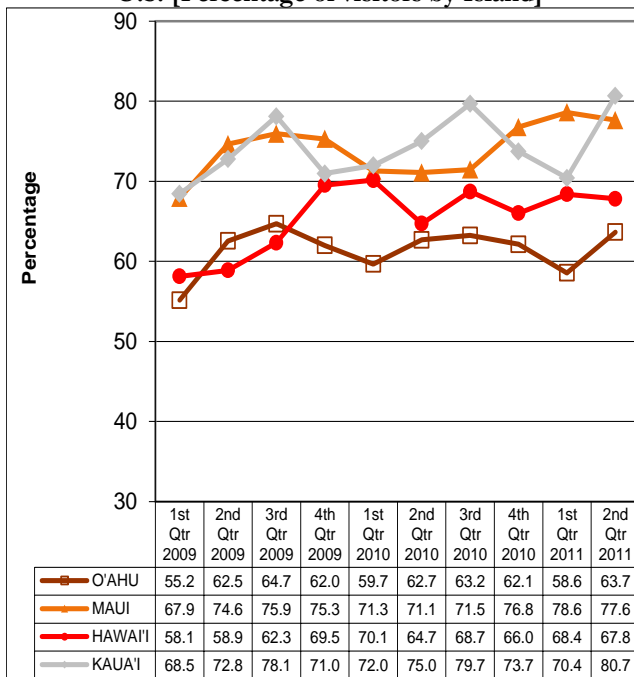
- A lower percentage of Japan visitors in the first quarter of 2011 (-6.2 percentage points to 41.7%) said that they want to go someplace new, compared to the first quarter of 2010. However, in the second quarter of 2011 the proportion rose 7.9 percentage points to 51 percent (see Figure 7).
- Similar to a year ago, one out of four Japan visitors in the first (27.2%) and second (29.1%) quarters of 2011 thought that the flight was too long.

- Less than ten percent of Japan visitors in the first (5.9%) and second (7.4%) quarters of 2011 said that Hawai'i did not provide enough value, similar to the respective quarters in 2010 and in 2009.

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]

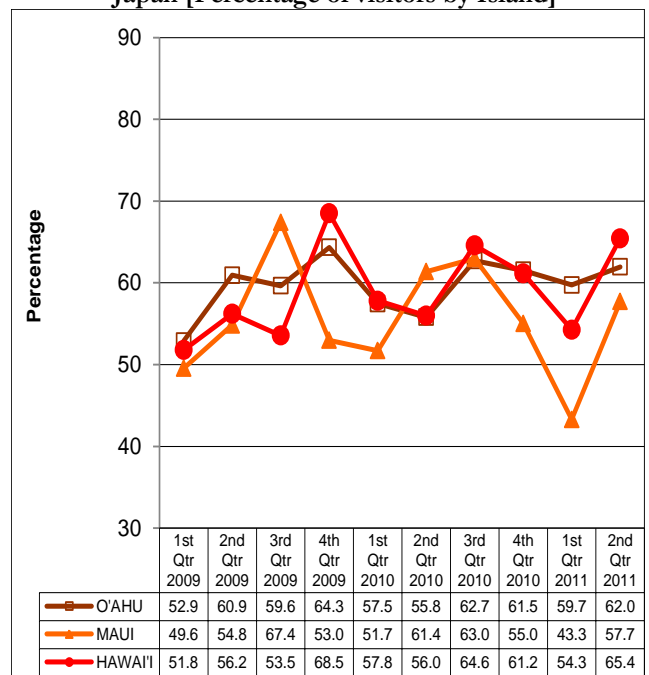


- Ratings from U.S. visitors on Maui or Kaua'i continued to be higher than ratings on O'ahu or Hawai'i Island (see Figure 8).
- U.S. visitors' ratings for Kaua'i improved 5.7 percentage points, from the second quarter of 2010, to a high of 80.7 percent in the second quarter of 2011.
- Compared to the respective quarters in 2010, the share of U.S. visitors who rated Maui excellent increased in the first (+7.3 percentage points to 78.6%) and second (+6.5

percentage points to 77.6%) quarters of 2011, to the highest percentages in five years.

- Consistent with a year ago, two out of three U.S. visitors in the first (68.4%) and second (67.8%) quarters of 2011 gave excellent ratings to Hawai'i Island. Ratings for Hawai'i Island, which were similar to O'ahu's ratings in 2009, have increased in recent quarters and are now closer to ratings for Maui and Kauai.
- The share of U.S. visitors in the first (58.6%) and second (63.7%) quarters of 2011 who rated O'ahu excellent were comparable to the first and second quarters of 2010.

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

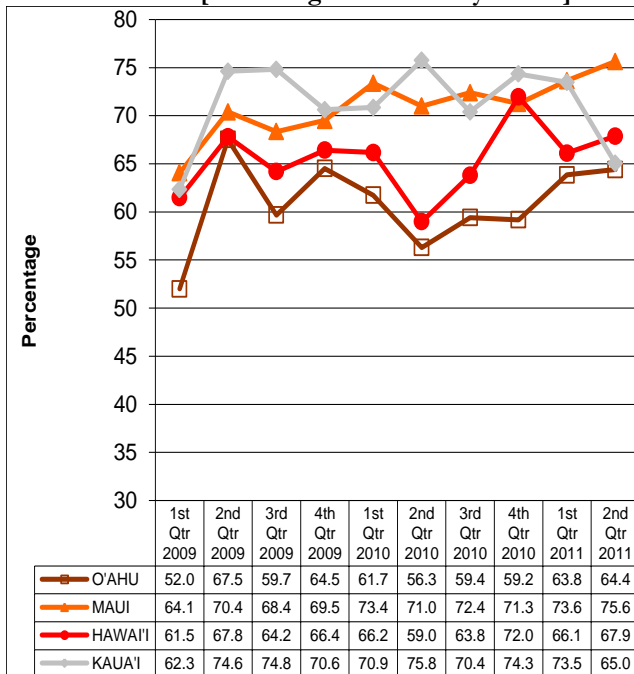


- Excellent ratings for O'ahu among Japan visitors in the first quarter of 2011 (59.7%) was consistent with the first quarter of 2010; while second quarter 2011 ratings rose 6.2 percentage points to 62 percent (see Figure 9).
- Similar to the first quarter of 2010, 54.3 percent of Japan visitors gave Hawai'i Island excellent ratings in the first quarter of 2011. Ratings in the second quarter of 2011 for Hawai'i Island improved 9.4 percentage

points, compared to the second quarter of 2010, to 65.4 percent.

- Excellent ratings for Maui from Japan visitors declined in the first quarter of 2011 (-8.4 percentage points to 43.3%) compared to the first quarter of 2010. Second quarter 2011 ratings for Maui (57.7%) was similar to the same quarter last year.
- Due to the low number of samples collected, Japan ratings for Kaua'i will not be presented in this report.

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



- Among visitors from Canada in the first quarter of 2011, excellent ratings for Maui (73.6%), Kaua'i (73.5%), Hawai'i Island (66.1%) and O'ahu (63.8%) were consistent with ratings in the first quarter of 2010 (see Figure 10).
- Maui ratings by Canada visitors had been steadily increasing over the last few years to a high of 75.6 percent in the second quarter of 2011.
- Canada visitor ratings for Kaua'i declined 10.8 percentage points from the second quarter of

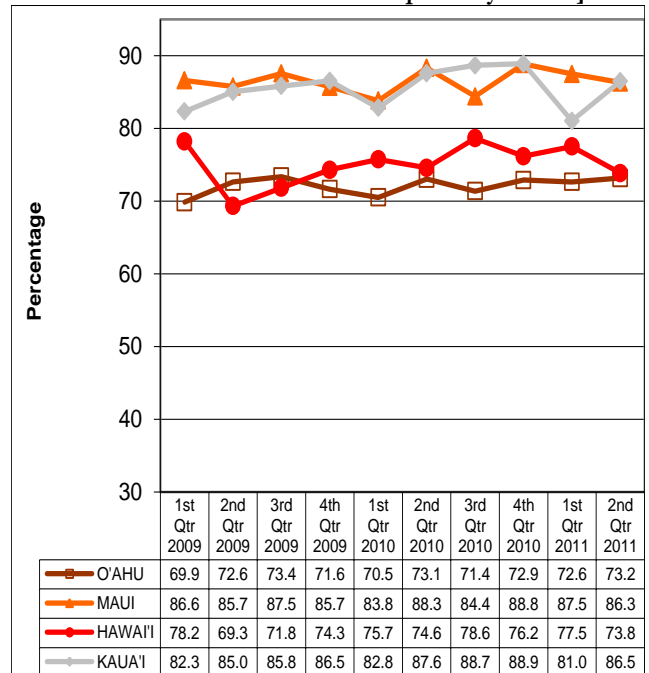
2010, to 65 percent in the second quarter of 2011.

- O'ahu ratings by Canada visitors in the second quarter of 2011 (64.4%) improved 8.1 percentage points from the second quarter of 2010.
- Hawai'i Island satisfaction ratings from Canada visitors for the second quarter of 2011 (+8.9 percentage points to 67.9%) were also higher compared to a year ago.

Individual Island Recommendation

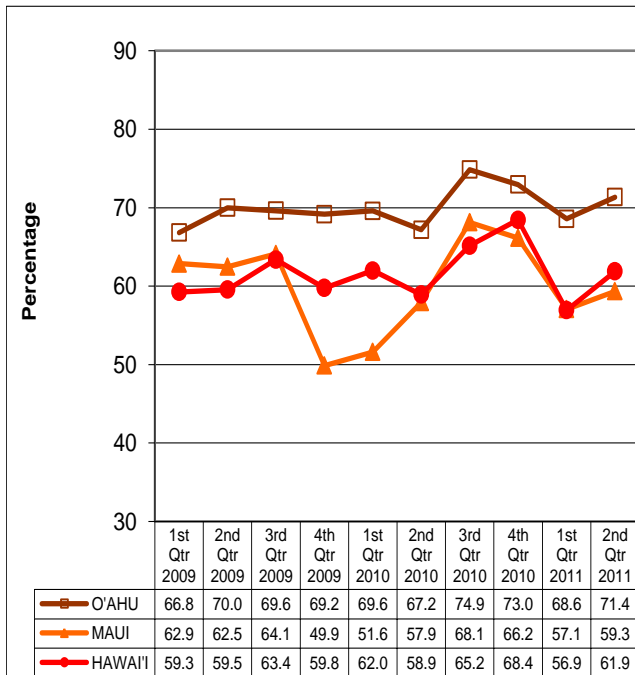
When visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family.

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]



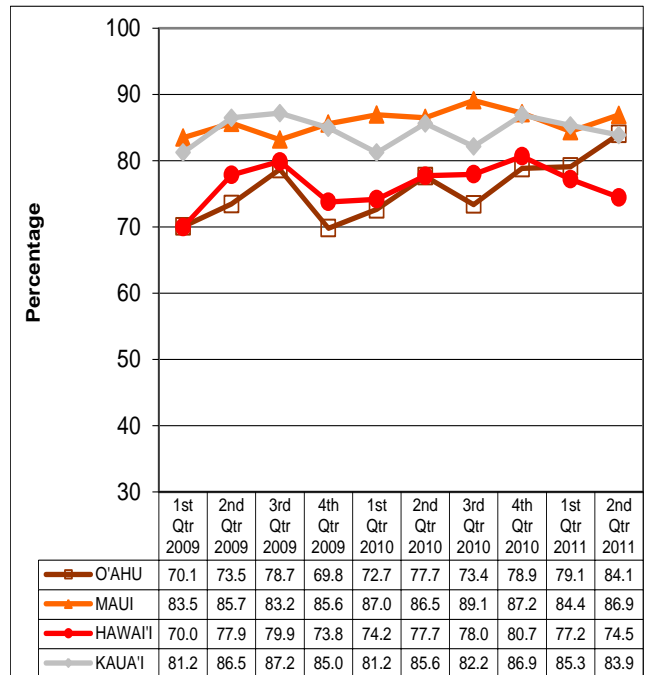
- U.S. visitors continued to be more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (see Figure 11).
- Ratings from U.S. visitors in the first and second quarters of 2011 for all islands were comparable with ratings in the first and second quarters of 2010.

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 Maui and Hawai’i Island. Second quarter 2011 rating for O’ahu improved 4.2 percentage points to 71.4 percent (see Figure 12).
- Maui’s ratings by Japan visitors increased in the first quarter of 2011 (+5.5 percentage points to 57.1%), while second quarter 2011 ratings (59.3%) were similar to a year ago.
- Hawai’i Island’s ratings by Japan visitors fell 5.1 percentage points to 56.9 percent in the first quarter of 2011. Second quarter 2011 ratings of 59.3 percent were consistent with the same quarter last year.
- Ratings for Kaua’i by Japan visitors will not be presented in this report due to the small number of samples collected.

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



- Up to the first quarter of 2011, Canada visitors were more likely to recommend Maui or Kaua’i over O’ahu or Hawai’i Island (see Figure 13).
- Canada visitors ratings for O’ahu (84.1%) slightly surpassed Kaua’i’s (83.9%) ratings in the second quarter of 2011. Ratings for O’ahu in the second quarter of 2011 was also the highest percentage in the last five years.

Attributes of Each Island

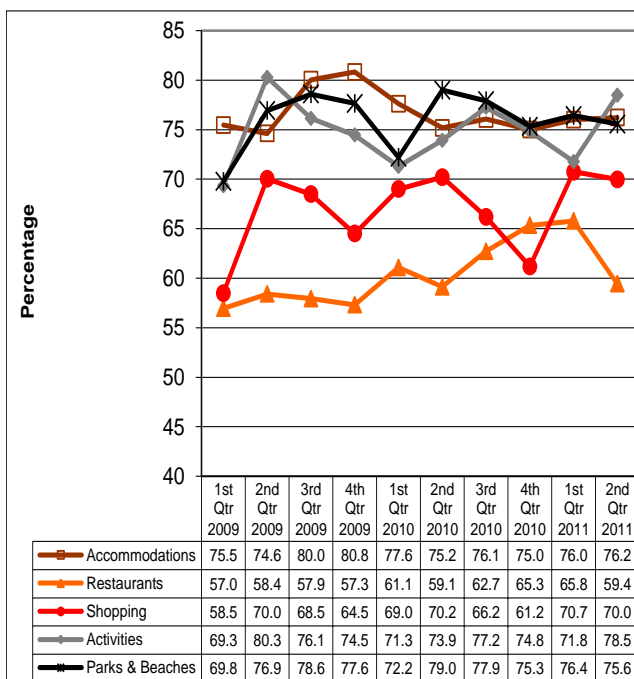
Analysis of the visitors’ satisfaction with the specific attributes, activities, and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction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

- In the first quarter of 2011, ratings on O’ahu’s parks and beaches improved 4.2 percentage points to 76.4 percent and was the highest rated attribute among U.S. visitors.

Accommodations (76%) were the second highest rated attribute, followed by activities (71.8%) and shopping (70.7%) (see Figure 14).

- In the second quarter of 2011, a 4.6 percentage points increase elevated activities (78.5%) to the highest rated attribute among U.S. visitors to O‘ahu; followed by accommodations (76.2%), parks and beaches (75.6%), and shopping (70%).

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]

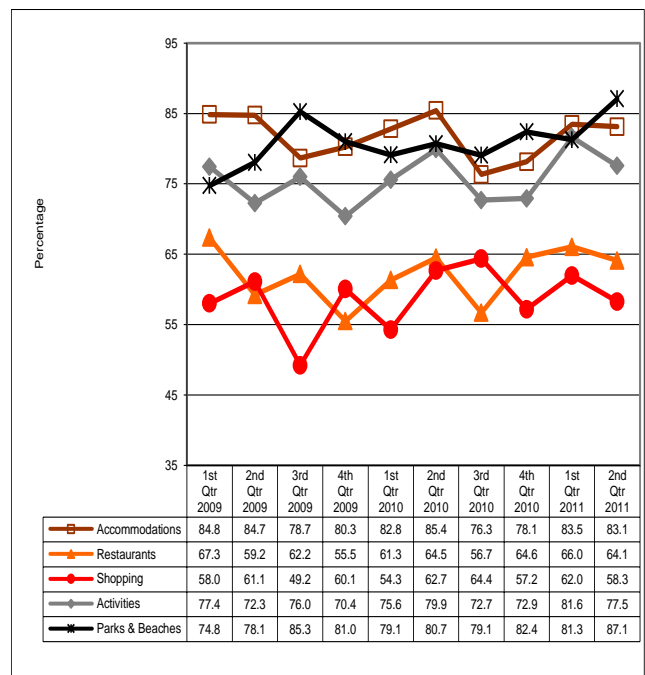


- Among U.S. visitors who gave high marks to O‘ahu’s parks and beaches, two out of three were very satisfied with the security, facilities, and cleanliness and comfort.
- Among those who were very satisfied with O‘ahu’s activities, two out of three U.S. visitors were very satisfied with the variety, excitement, and service. Close to 50 percent were very satisfied with the value.
- Among those who were very satisfied with O‘ahu’s accommodations, about 80 percent of U.S. visitors were very satisfied with the location; close to 70 percent were very

satisfied with the service, cleanliness and comfort, and facility; and about 60 percent very satisfied with the value for the money.

- Among U.S. visitors who were very satisfied with shopping on O‘ahu, three out of four felt there were sufficient shopping places and locations; two out of three were very satisfied with the variety and service; but only about 40 percent felt there was value for the money.
- Restaurants on O‘ahu continued to be the lowest rated attribute in both quarters of 2011. However, there were improvements in restaurant ratings by U.S. visitors in the first (+4.7 percentage points to 65.8%) quarter of 2011, compared to a year ago. Two out of three U.S. visitors were very satisfied with the location, variety, service, and quality of O‘ahu restaurants but only 40 percent felt that 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]

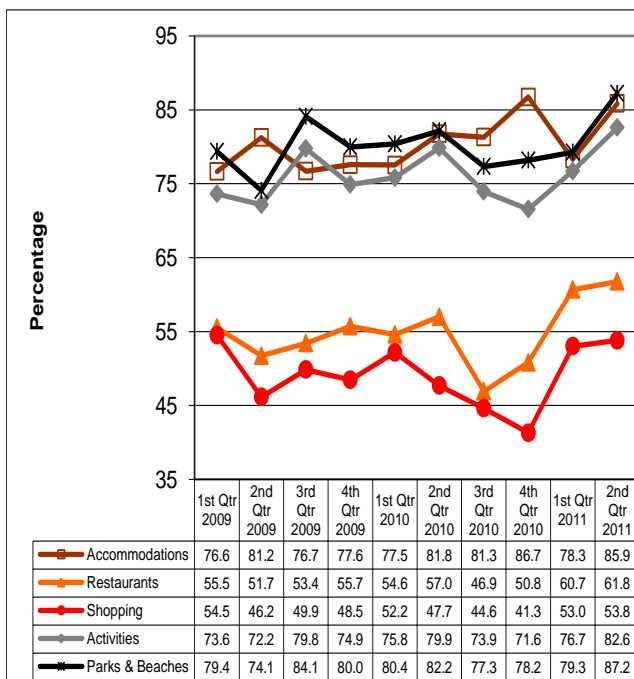


- Accommodations (83.5%) on Maui were the highest rated attribute among U.S. visitors in the first quarter of 2011, followed by activities (81.6%), parks and beaches (81.3%), and

restaurants (66%). There were moderate increases in ratings for activities (+6 percentage points) and restaurants (+4.7 percentage points) compared to the first quarter of 2010. Ratings for shopping on Maui improved 7.7 percent to 62 percent in the first quarter of 2011 (see Figure 15).

- In the second quarter of 2011, ratings for parks and beaches rose 6.4 percentage points to 87.1 percent, and were highest rated attribute among U.S. visitors on Maui. The second highest attribute were accommodations (83.1%), activities (77.5%), and restaurants (64.1%).

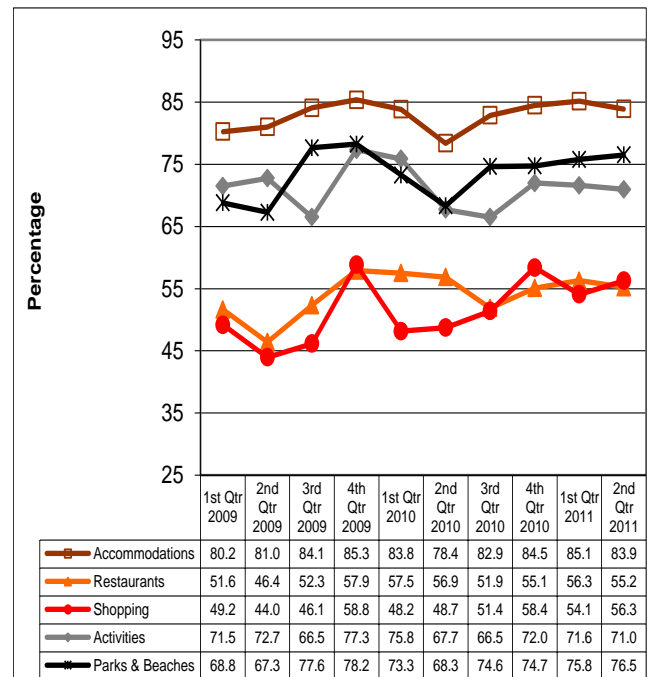
Figure 16: Detailed Satisfaction Ratings for U.S. Visitors to Kaua'i [Percentage of U.S. visitors to Kaua'i who were "Very Satisfied" with Attribute]



- U.S. visitors in the first quarter of 2011 were more satisfied with Kaua'i's parks and beaches (79.3%), accommodations (78.3%), and activities (76.7%). Restaurants (60.7%) and shopping (53%) ratings on the island continued to be much lower than other attributes. First quarter 2011 ratings on restaurants rose 6.1 percentage points compared to the first quarter of 2010 (see Figure 16).

- In the second quarter of 2011, parks and beaches (87.2%) were the highest rated attribute among U.S. visitors on Kaua'i, followed by accommodations (85.9%), activities (82.6%), and restaurants (61.8%). There were moderate increases in ratings on parks and beaches (+5 percentage points) and restaurants (+4.8 percentage points) compared to the second quarter of 2010. Ratings for shopping on Kaua'i rose 6.1 percent to 53.8 percent in the second quarter of 2011.

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]

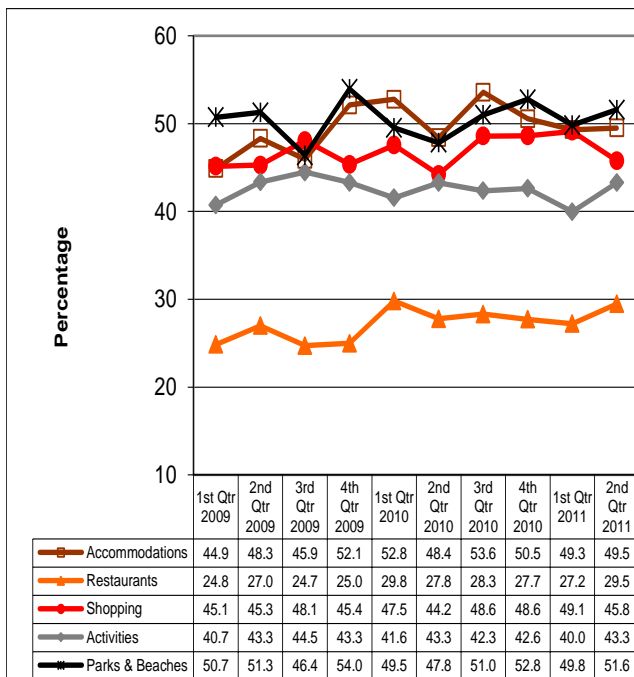


- Hawai'i Island's accommodations were the highest rated attribute among U.S. visitors in the first (85.1%) and second (83.9%) quarters of 2011. Accommodations ratings in the second quarter of 2011 rose 5.5 percentage points from a year ago (see Figure 17).
- Parks and beaches rated second highest in the first (75.8%) and the second (76.5%) quarters of 2011. Ratings on Hawai'i Island's parks and beaches in the second quarter of 2011

increased 8.2 percent compared to the same quarter in 2010.

- Ratings on Hawai'i Island's activities decreased in the first quarter of 2011 (-4.2 percentage points) to 71.6 percent. Activities ratings in the second quarter of 2011 (71%) were comparable to the second quarter of 2010.
- Similar to Kaua'i and Maui, U.S. visitors' ratings were much lower for Hawai'i Island's restaurants and shopping. However, there were improvements in shopping ratings in the first (+5.9 percentage points to 54.1%) and second (+7.6 percentage points to 56.3%) quarters of 2011, compared to the same periods in 2010.

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



- Ratings by Japan visitors in the first and second quarters of 2011 for all attributes were similar to both quarters of 2010.
- O'ahu's Parks and beaches were the highest rated attribute among Japan visitors in the first (49.8%) and second (51.6%) quarters of 2011. Four out of ten Japan visitors were

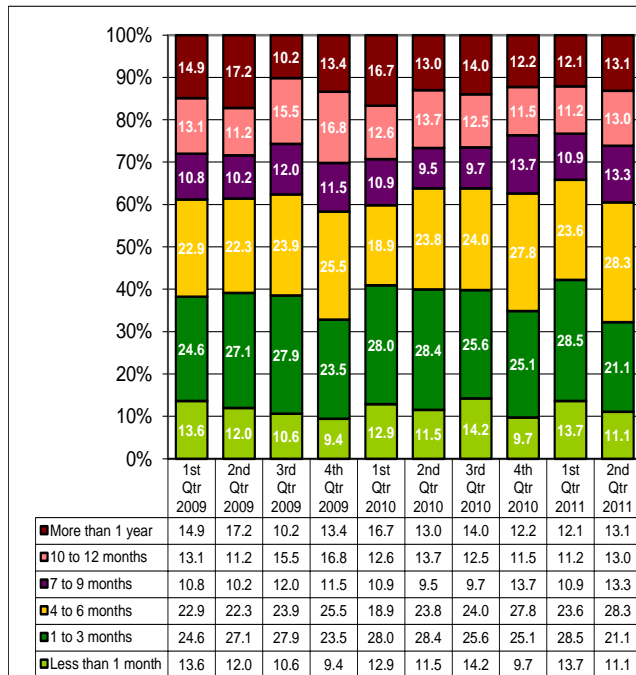
very satisfied with the security, while one out of three visitors were very satisfied with the facilities, cleanliness and comfort.

- Accommodations ratings were the second highest rated attribute in the first (49.3%) and second (49.5%) quarters of 2011. Over half of Japan visitors were very satisfied with the location. Four out of ten Japan visitors were very satisfied with the cleanliness and comfort, and value for the money, and less than 35 percent were very pleased with the service and facility.
- Shopping was the third highest rated attribute among Japan visitors to O'ahu in 2011. Six out of ten Japan visitors felt there were sufficient shopping places; four out of ten were very satisfied with the location and variety; but only about 30 percent were very satisfied with the service and quality, local/handmade items, or felt there was value for the money.
- Restaurants continued to be the lowest rated attribute. In both quarters of 2011, only about 30 percent of Japan visitors were very satisfied with restaurants on O'ahu. About a third of Japan visitors were very satisfied with the location; a quarter were very satisfied with the variety, quality and service while only about 20 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.

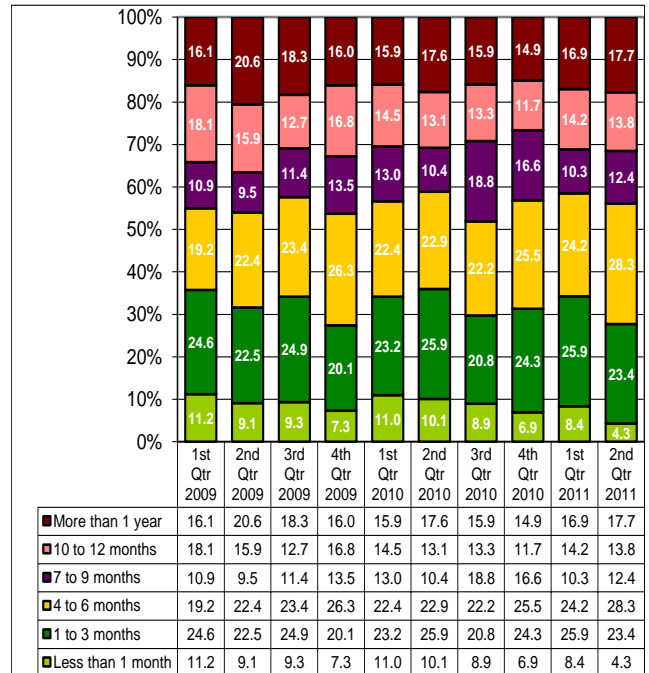
Figure 19: When Did U.S. West Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. West visitors]



- The majority of U.S. West visitors continued to make decisions four months or more before arriving (see Figure 19).
- The percentage of U.S. West visitors in the first quarter of 2011 who decided to visit Hawai'i four or more months before departure, (57.8%) was similar to the first quarter of 2010. A higher percentage of U.S. West visitors in the second quarter of 2011 (67.7%) decided to visit Hawai'i four or more months before arriving compared to the second quarter of 2010 (60%).
- Seven out of ten U.S. West visitors in the first (75%) and second (69.1%) quarters of 2011 purchased package tours less than one month before departure. Seven out of ten U.S. West visitors in both quarters of 2011 made rental car reservations within three months or less.

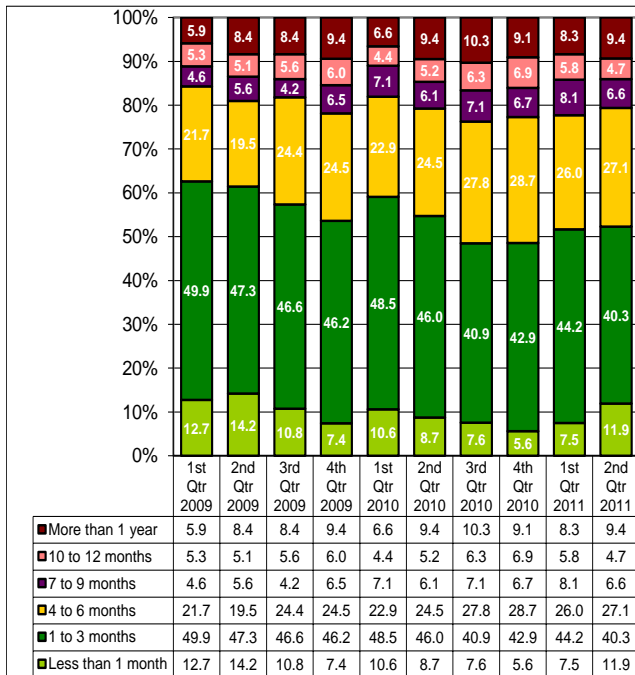
Three out of four U.S. West visitors in the first (78.8%) and second (78.4%) quarters of 2011 made accommodation reservations six months or less before their visit.

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



- A larger percentage of U.S. East visitors started earlier than their U.S. West counterparts. Similar to a year ago, four out of ten U.S. East visitors in the first (41.4%) and second (43.9%) quarters of 2011 decided to visit Hawai'i at least seven months before arrival (see Figure 20).
- Three out of four of U.S. East visitors in the first (73.1%) and second (77.3%) quarters of 2011 made accommodation reservations six months or less before coming to the islands. Seven out of ten U.S. East visitors in the first (68.8%) and second (68.3%) quarters of 2011 made rental car reservations three months or less prior to arriving. The majority of U.S. East visitors in the first (67.1%) and second (63.7%) quarters of 2011 purchased packaged 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]



- Visitors from Japan continued to have a much shorter booking window than U.S. visitors. About half of Japan visitors in the first (51.7%) and second (52.2%) quarters of 2011 decided to visit Hawai'i three months or less before departure. The percentage for the first quarter of 2011 was 7.4 percentage points lower than the first quarter of 2010 (see Figure 21).
- Three out of four Japan visitors in the first (73.7%) and second (74.2%) quarters of 2011 made accommodations reservations three months or less before departure. Close to 90 percent of Japan visitors in both quarters of 2011 made rental car reservations within three months before coming to the islands. Six out of ten Japan visitors in both quarters of 2011 purchased packages 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]

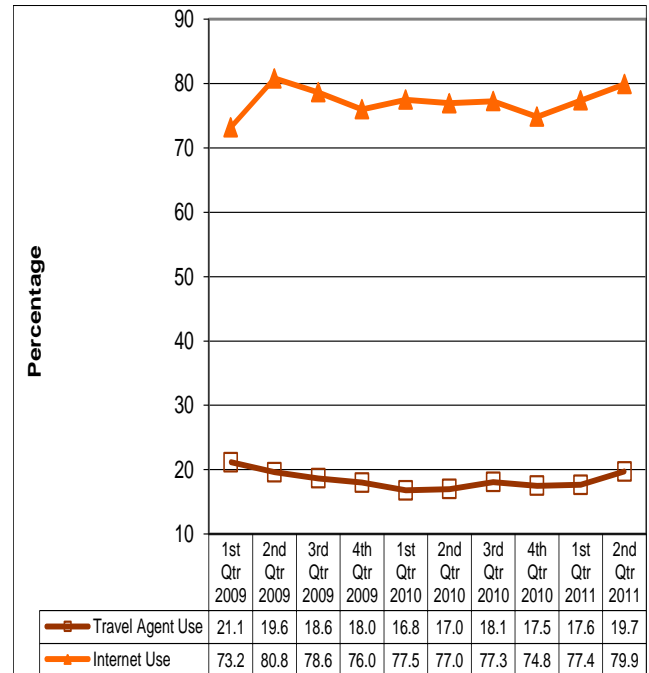
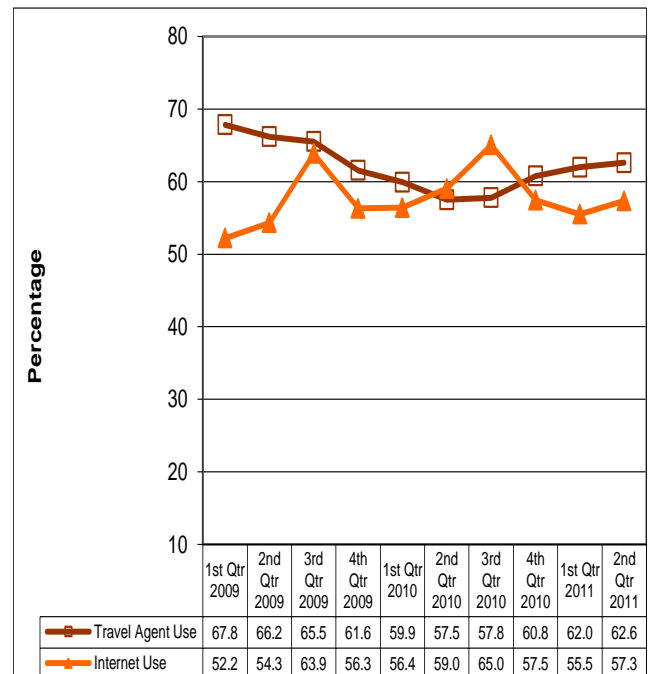


Figure 23: Internet and Travel Agent Use – Japan [Percentage of Japan visitors]



- Similar to a year ago, eight out of ten U.S. visitors in both quarters of 2011 used the Internet for trip planning purposes; while only about 20 percent of U.S. visitors in both

quarters of 2011 used travel agents (see Figure 22).

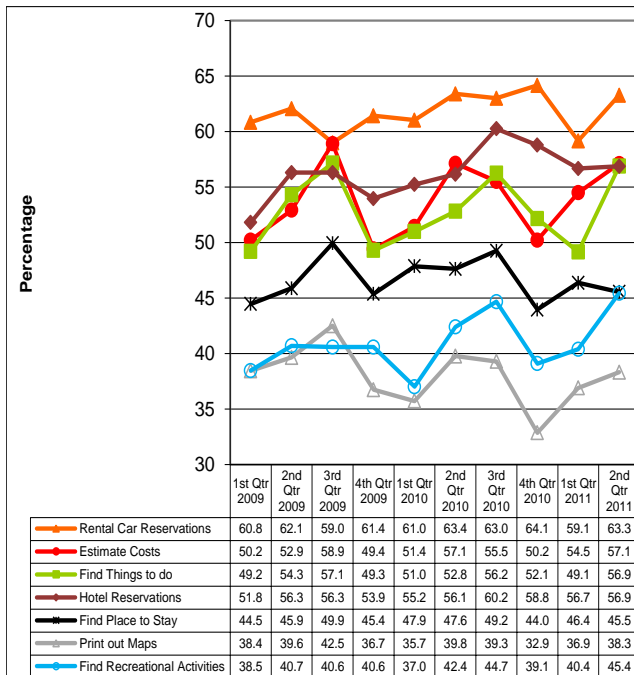
- Starting in the fourth quarter of 2010, travel agent usage by Japan visitors had once again surpassed Internet usage for trip planning purposes. More Japan visitors in the second quarter of 2011 (62.6%) used travel agents compared to the second quarter of 2010 (57.5%) (see Figure 23).

Internet Use

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

- Similar to 2010, the majority of U.S. visitors in the first (84.2%) and second (82.4%) quarters of 2011 used the Internet to make airline reservations (not shown in figure).

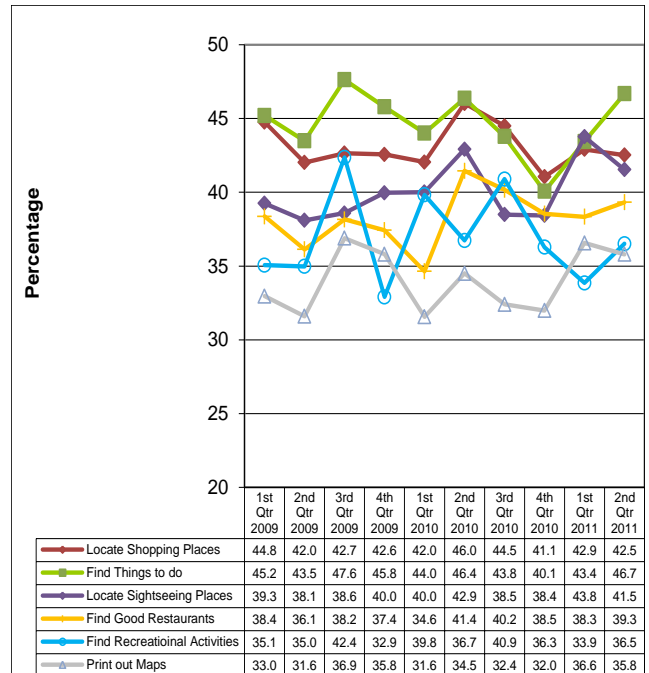
Figure 24: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]



- Making car reservations continued to be the second most popular usage of the Internet with six out of ten U.S. visitors in both quarters of 2011 (see Figure 24).

- Over half of U.S. visitors in the first (56.7%) and second (56.9%) quarters of 2011 made hotel reservations on the Internet.
- About half of U.S. visitors in both quarters of 2011 also used the Internet to estimate costs, and to find things to do.

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

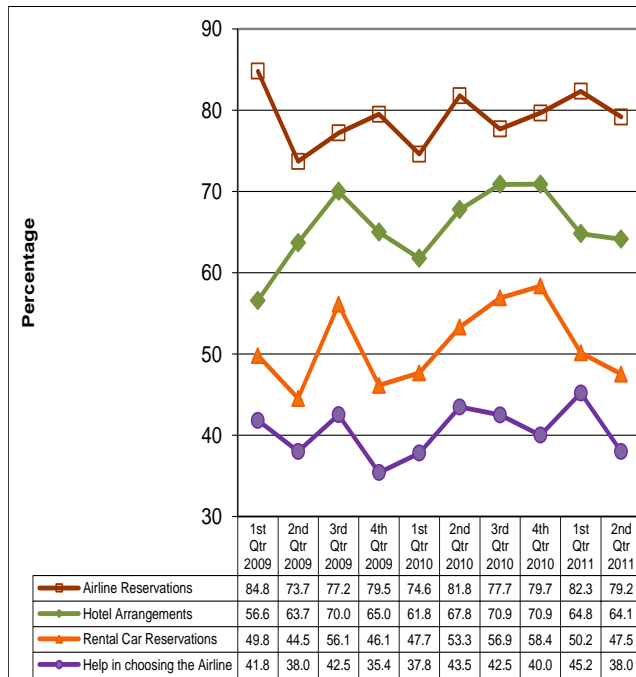


- Of the Japan visitors who used the Internet in 2011, 66.9 percent in the first quarter and 67.5 percent in the second quarter used it to find a place to stay. These percentages were about the same as the previous year (not shown in figure).
- Similar to a year ago, nearly 40 percent of Japan visitors in both quarters of 2011, used the Internet to find things to do, locate shopping places and locate sightseeing places (see Figure 25).

Travel Agent Use

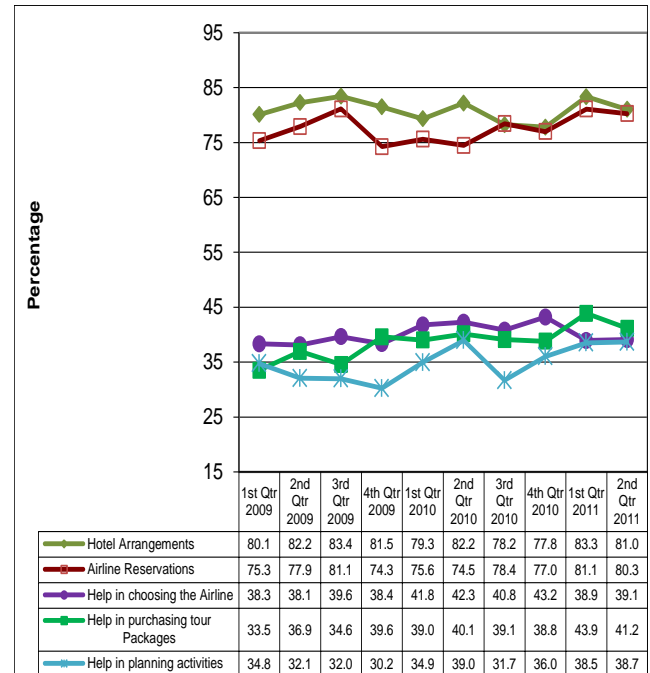
Note that the statistic reported for each travel agent use is the percentage of those who used a travel agent (from Internet and Travel Agent Use).

Figure 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. Among U.S. visitors in 2011, 82.3 percent in the first quarter and 79.2 percent in the second quarter made airline reservations through travel agents. The percentage in the first quarter of 2011 was 7.7 percentage points higher compared to the first quarter of 2010 (see Figure 26).
- The second most popular use of travel agent among U.S. visitors in the first (64.8%) and second (64.1%) quarters of 2011 was making hotel arrangements, same as the previous year.
- In the second quarter of 2011, the percentages of U.S. visitors who used travel agents to make rental car reservations (47.5%) were 5.8 percentage points lower compared to the second quarter of 2010.

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



- The two most popular uses of travel agents among eight out of ten Japan visitors in 2011 continued to be for hotel arrangements and airlines reservations (See Figure 27).
- A higher percentage of Japan visitors in the first (+5.5 percentage points to 81.1%) and second (+5.8 percentage points to 80.3%) quarter of 2011 made airlines reservations through their travel agents compared to last year.

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 and 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

In the first and second quarters of 2011, survey questionnaires were mailed to selected U.S., Japan, and Canada visitors after they had returned home from their trip to Hawai'i. 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 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 survey has eight pages with 33 questions.

English and Japanese speaking respondents were also given the option of filling out the Visitor Satisfaction Survey questionnaire online. Data collected from the online surveys were downloaded and merged in with the database containing statistics scanned from the mailed survey on a weekly basis.

**Table 1: Sample Size
January – March 2011**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% Confidence Interval
Japan	3,183	1,220	38.3%	+/- 2.2
U.S.	7,892	2,491	31.6%	+/- 1.62
Canada	4,306	1,446	33.6%	+/- 2.1

**Table 2: Sample Size
April - June 2011**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% Confidence Interval
Japan	3,373	1,428	42.3%	+/-1.97
U.S.	6,579	1,651	25.1%	+/-2.09
Canada	1,871	537	28.7%	+/- 3.57

Due to the low number of samples achieved, data for Lāna'i and Moloka'i 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, contact the Hawai'i Tourism Authority (HTA) at (808) 973-2255.