



2011

Visitor Satisfaction
Monitoring Report

Fourth Quarter
(October – December)

HAWAII TOURISM

AUTHORITY

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INTRODUCTION

This monitoring report presents selected preliminary statistics from the fourth quarter 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 fourth quarter (October – December) of 2011 rose 3.5 percent compared to the fourth quarter of 2010 to 1,784,763 visitors. Arrivals from Canada, with 135,018 visitors, showed the largest increase (+9.6%). Arrivals from U.S. West (+1.1% to 740,456 visitors) and U.S. East (+1.5% to 374,521 visitors) were also higher compared to the fourth quarter of 2010. Nine months after the devastating earthquake and tsunami, arrivals from Japan grew 1 percent in the fourth quarter of 2011 to 308,566 visitors. The average length of stay for all visitors to the state was 9.65 days, compared to 9.49 days in the fourth quarter of 2010.

For all of 2011, total arrivals by air rose 3.5 percent, from 2010, to 7,159,613 visitors. Arrivals from Canada (+17.9%), U.S. West (+2.4%) and U.S. East (+2%) increased, but arrivals from

Japan declined 5.1 percent. The combined length of stay increased to 9.55 days, from 9.39 days in 2010.

RESULTS

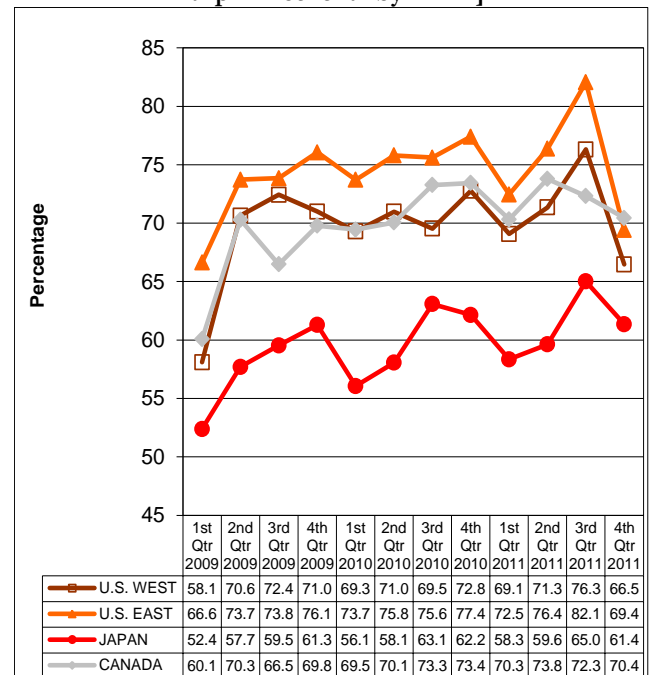
Visitor Satisfaction Ratings

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

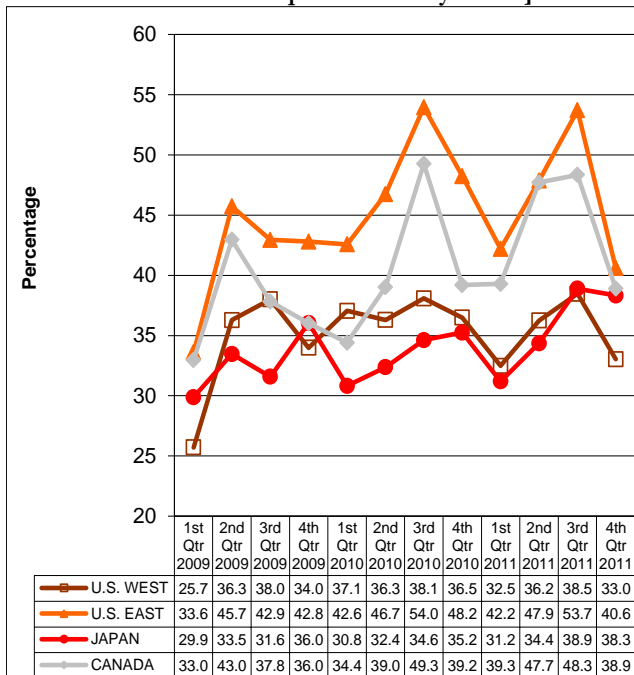
The majority of visitors from the top four MMAs continued to give *excellent* marks for their overall experience in Hawai'i (see Figure 1).

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



- Two out of three U.S. West, U.S. East and Canada visitors, and 61.4 percent of Japan visitors in the fourth quarter of 2011, rated their most recent trip to Hawai'i as **excellent**. However, U.S. West and U.S. East ratings declined 6.3 percentage points and 8 percentage points, respectively, compared to the fourth quarter of 2010.
- When compared to the fourth quarter of 2009, excellent ratings from U.S. East in the fourth quarter of 2011 fell 6.7 percentage points. Excellent rating from U.S. West decreased 4.5 percentage points, but was not considered statistically significant.

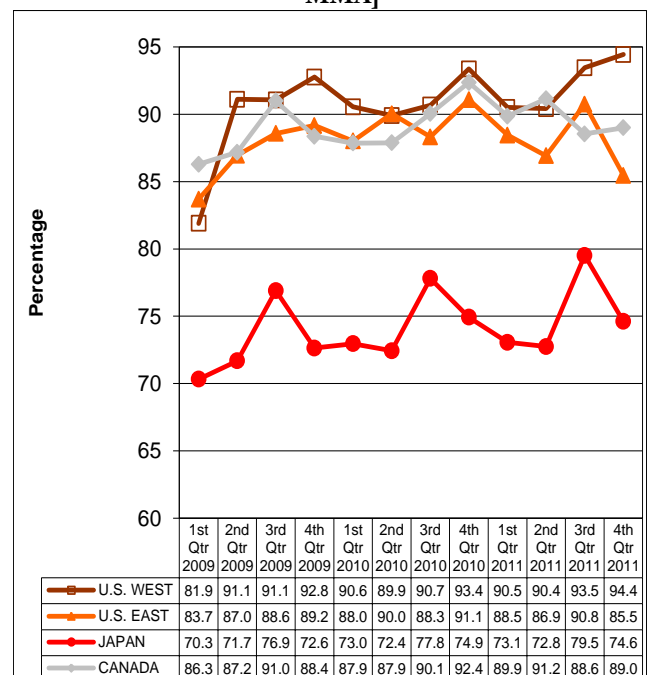
Figure 2: Trip Exceeds Expectations
[Percentage of visitors who said this trip "Exceeded Expectations" by MMA]



Hawai'i's ability to **exceed expectations** continues to be quite strong (see Figure 2).

- In the fourth quarter of 2011, 40.6 percent of U.S. East visitors said their recent trip to Hawai'i exceeded expectations. This was a 7.6 percentage point decrease compared to the fourth quarter of 2010, and was the lowest rating for this market since the first quarter of 2009 (33.6%).
- Ratings from U.S. West, U.S. East, Japan and Canada visitors in the fourth quarter of 2011 were similar to the fourth 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]



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,

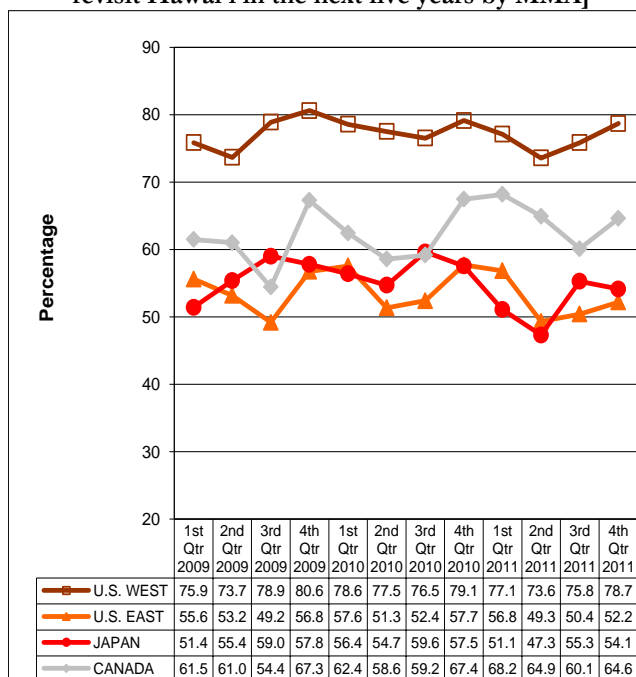
Very Likely to Recommend Hawai'i

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.

- Since 2007, seven out of ten Japan visitors, and over eight out of ten U.S. West, U.S. East and Canada visitors have responded that they would be very likely to recommend Hawai'i (see Figure 3).
- Ratings in the fourth quarter of 2011 from U.S. West visitors (94.4%) was the highest for this market in the last five years.

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]



Likelihood to Revisit Hawai'i

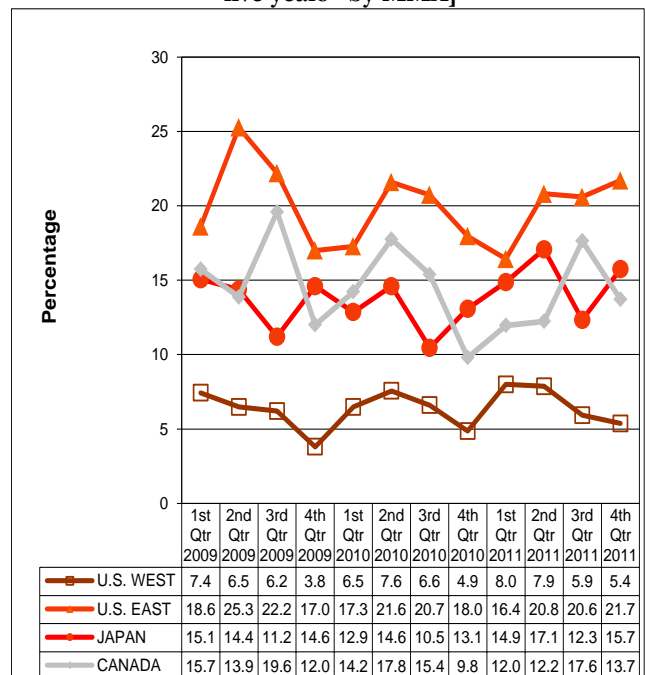
A visitor's decision to return to Hawai'i is influenced by positive experiences on their most recent trip and other factors such as curiosity for new experiences, available time, financial situation, and other commitments. Likelihood to revisit Hawai'i, as an indicator, helps to estimate future demand and changes in desires.

- Three out of four U.S. West visitors and over half of U.S. East, Japan and Canada visitors continued to respond that they would very

likely revisit Hawai'i in the next five years (see Figure 4).

- Very likely to revisit rating from U.S. East visitors decreased 5.5 percentage points compared to the fourth quarter of 2010. However, this was within the margin of error and not considered statistically significant
- Similar amounts of U.S. West, U.S. East, Japan and Canada visitors in the fourth quarter of 2011 said that they would very likely revisit Hawai'i compared to the fourth quarter of 2009.

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]



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).

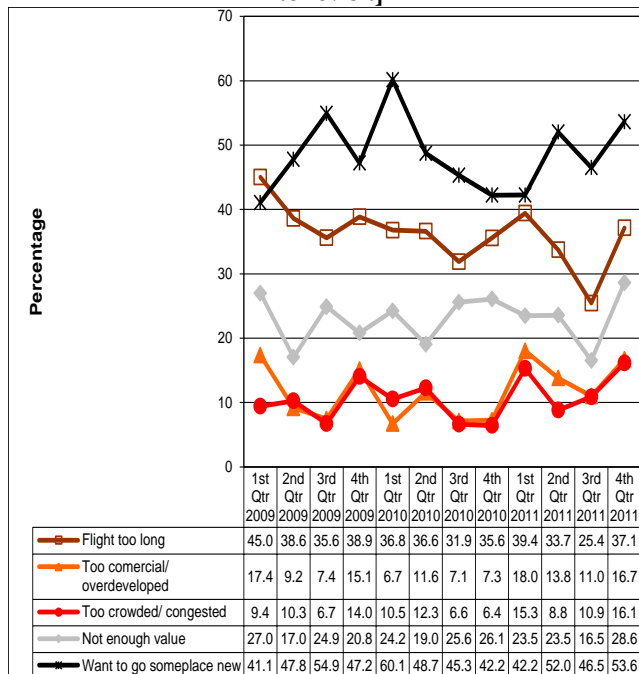
- Consistent with previous years, 5.4 percent of U.S. West visitors, 13.7 percent of Canada

visitors, 15.7 percent of Japan visitors and 21.7 percent of U.S. East visitors in the fourth quarter of 2011, responded that they were not likely to revisit Hawai'i in the next five years.

Reasons for Not Revisiting Hawai'i

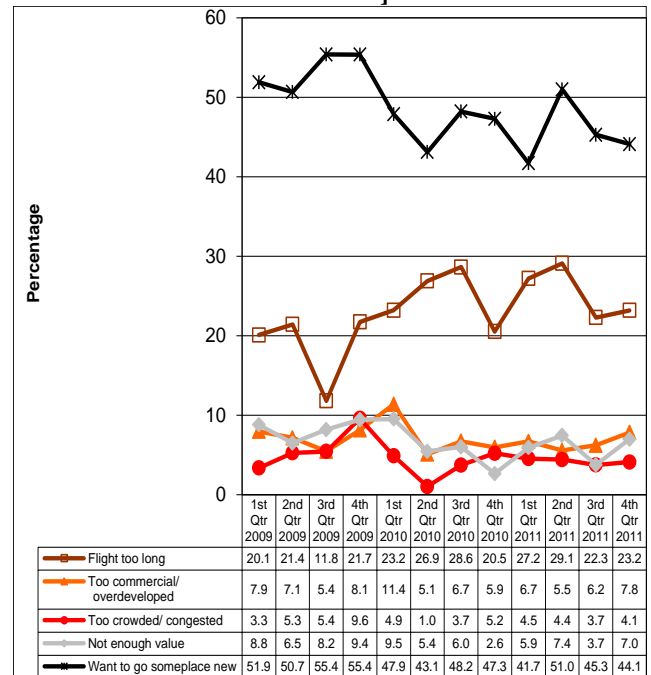
Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were *"not likely to revisit Hawai'i"* (from previous section).

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



- In the fourth quarter of 2011, 53.6 percent of U.S. visitors who were not likely to revisit Hawai'i said that they want to go someplace new. This was an increase of 11.4 percentage points from the fourth quarter of 2010; and 6.4 percentage points higher than the fourth quarter of 2009 (see Figure 6).
- More U.S. visitors in the fourth quarter of 2011 said that Hawai'i was too commercial/overdeveloped (+9.4 percentage points to 16.7%), or too crowded/congested (+9.7 percentage points to 16.1%) compared to the fourth quarter of 2010.

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

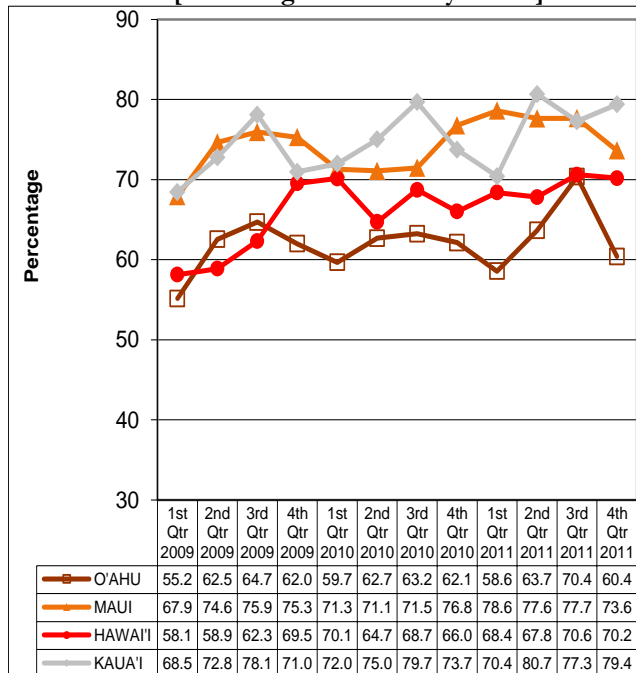


- In the fourth quarter of 2011, 44.1 percent of Japan visitors were not likely to revisit Hawai'i because they want to go someplace new. This percentage was about the same as the fourth quarter of 2010, and 11.3 percentage points lower than the fourth quarter of 2009.
- Consistent with previous years, two out of ten Japan visitors in the fourth quarter of 2011 (23.2%) said that the flight was too long.
- Seven percent of Japan visitors in the fourth quarter of 2011 said that Hawai'i did not provide enough value. This was 4.4 percentage points higher than the fourth quarter of 2010; and similar to the fourth quarter of 2009.

Individual Island Experience

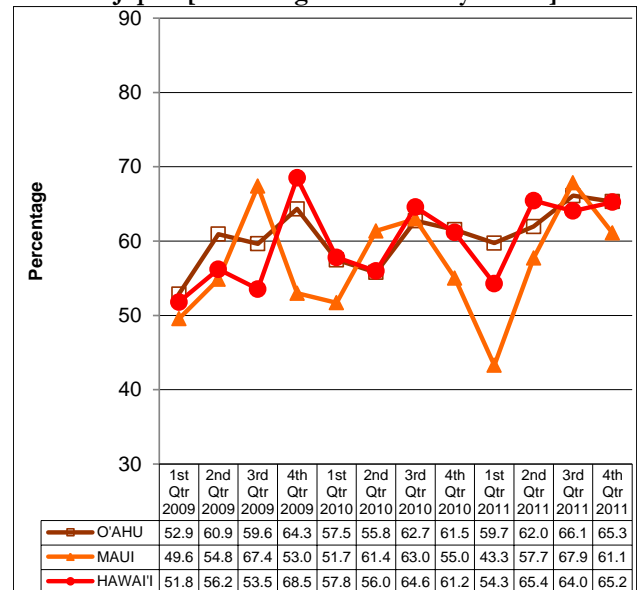
Each island has unique characteristics, activities, and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip.

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



- Percentages of excellent ratings from U.S. visitors on Maui or Kaua'i in the fourth quarter of 2011 continued to be higher than excellent ratings on O'ahu or Hawai'i Island (see Figure 8).
- Excellent ratings for Kaua'i (79.4%) rose 5.7 percentage points from the fourth quarter of 2010, and increased 8.4 percent from the fourth quarter of 2009.
- Excellent ratings for Maui (73.6%), Hawai'i Island (70.2%) and O'ahu (60.4%) were comparable to the fourth quarters of 2009 and 2010.

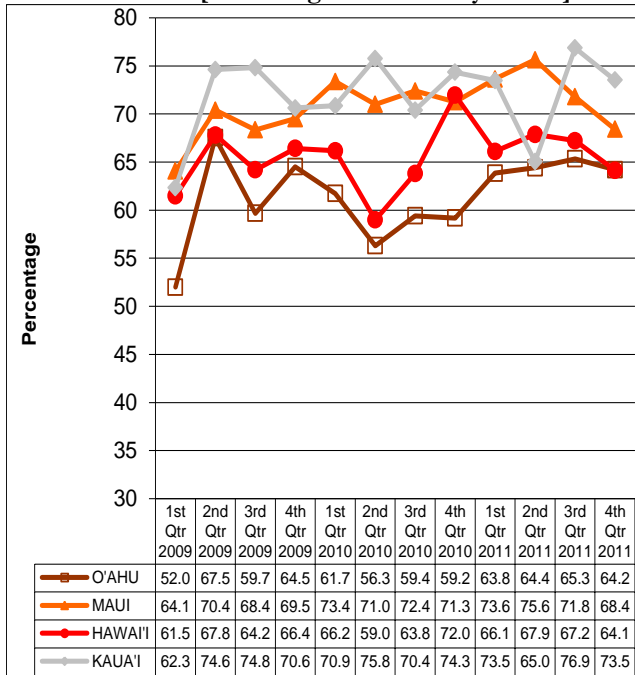
Figure 9: Island Experience Rated as Excellent - Japan [Percentage of visitors by Island]



Note: Due to the low number of samples collected, Japan ratings for Kaua'i will not be presented in this report.

- Ratings from Japan visitors for O'ahu (65.3%), and Hawai'i Island (65.2%) in the fourth quarter of 2011 were almost identical (see Figure 9). These ratings were also similar to the fourth quarters of 2009 and 2010.
- Excellent ratings for Maui (61.1%) from Japan visitors increased 6.1 percentage points from the fourth quarter of 2010 and grew 8.1 percentage points from the fourth quarter of 2009.

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



- Among visitors from Canada in the fourth quarter of 2011, excellent ratings for Kaua'i (73.5%), Maui (68.4%) and O'ahu (64.2%) were similar to ratings in the fourth quarter of 2010 (see Figure 10).
- Canada visitor ratings for Hawai'i Island (64.1%) decreased 7.9 percentage points compared to the fourth quarter of 2010.

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 in the fourth quarter of 2011 continued to more likely recommend Kaua'i or Maui over Hawai'i Island or O'ahu (see Figure 11).
- In the fourth quarter of 2011, 93 percent of U.S. visitors would very likely recommend Kaua'i. This was the highest percentage in five years.

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]

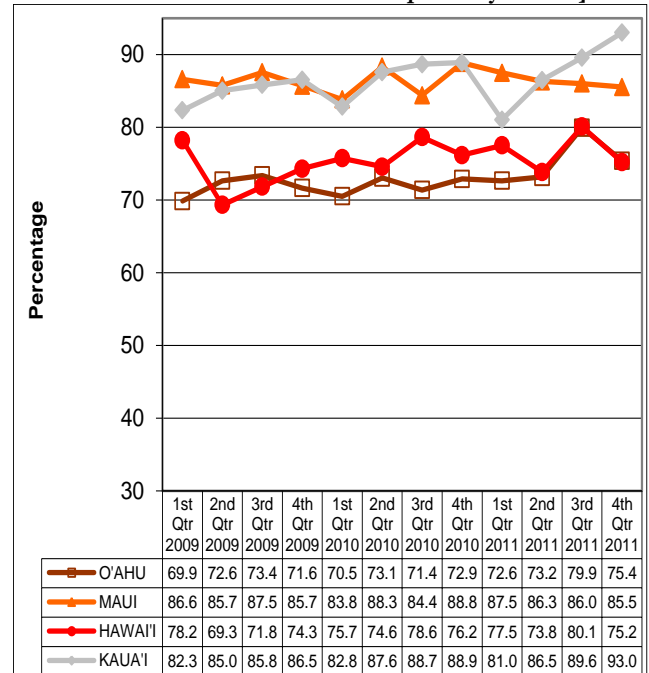
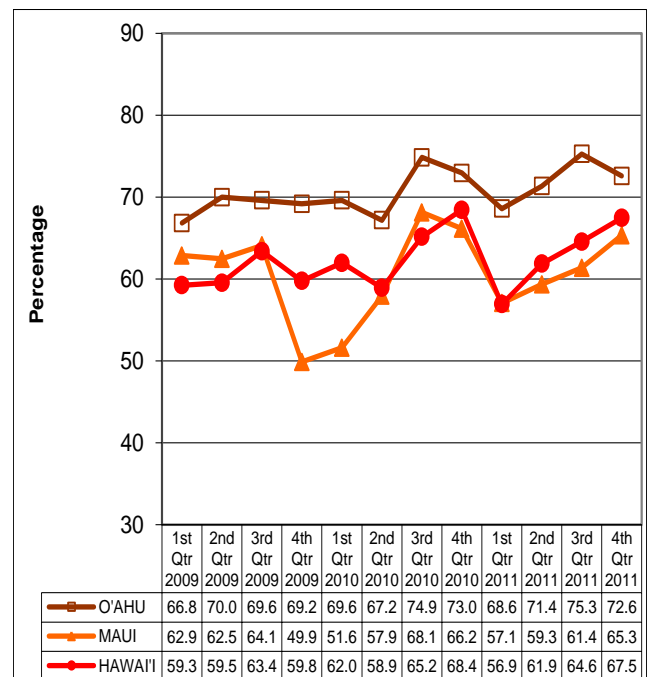


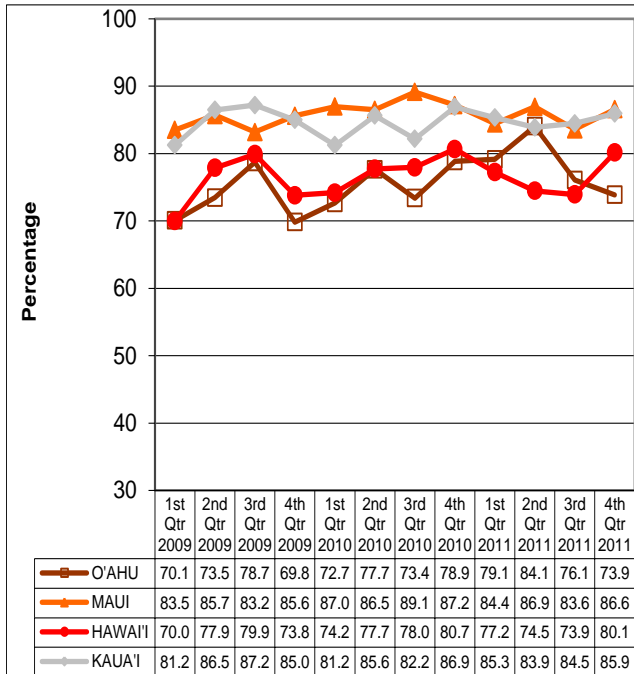
Figure 12: Very Likely to Recommend Island – Japan [Percentage of visitors who are "Very Likely" to recommend Island as a vacation place by Island]



Note: Due to the low number of samples collected, Japan ratings for Kaua'i will not be presented in this report

- Japan visitors in the fourth quarter of 2011 continued to be more likely to recommend O‘ahu (72.6%) over Hawai‘i Island (67.5%) and Maui (65.3%). Ratings for all three islands were comparable to the fourth quarter of 2010 (see Figure 12).

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



- Similar to their U.S. counterparts, Canada visitors in the fourth quarter of 2011 continued to be more likely to recommend Maui (86.6%) or Kaua‘i (85.9%) over Hawai‘i Island (80.1%) or O‘ahu (73.9%) (see Figure 13).
- Ratings by Canada visitors in the fourth quarter of 2011 for all four islands were about the same compared to a year ago.

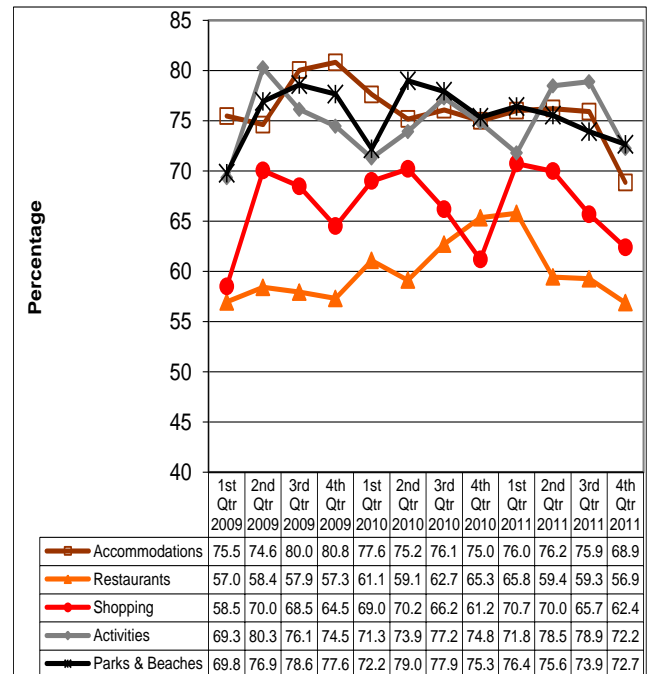
Attributes of Each Island

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.

- Parks and beaches (72.7%) were the highest rated attribute among U.S. visitors on O‘ahu in the fourth quarter of 2011, followed by activities (72.2%), accommodations (68.9%) and shopping (62.4%). There was a 6.1 percentage point decrease in ratings for accommodations compared to the fourth quarter of 2010 (see Figure 14).

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]

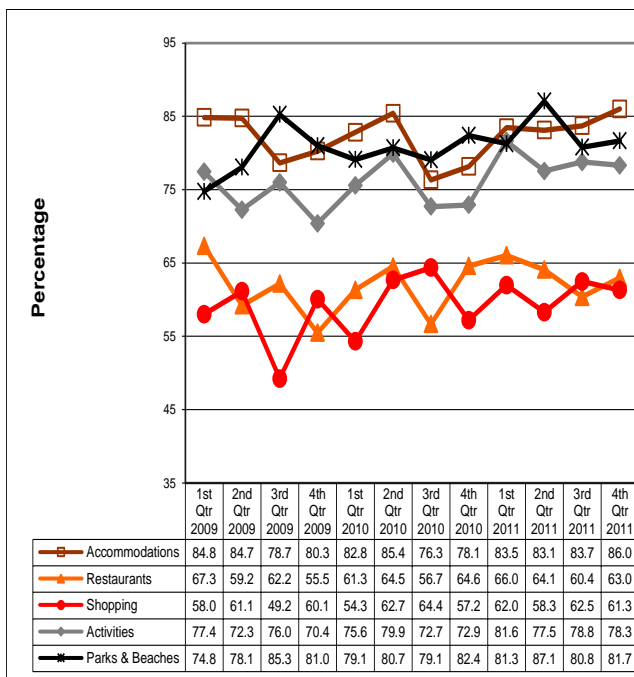


- Among U.S. visitors who gave high marks to O‘ahu’s parks and beaches, six out of ten were very satisfied with the security, facilities, cleanliness and comfort.
- Among those who were very satisfied with O‘ahu’s activities, two out of three U.S. visitors were very satisfied with the variety, excitement, and service; while 51.4 percent were very satisfied with the value.
- Among those who were very satisfied with O‘ahu’s accommodations, 85 percent of U.S. visitors were very satisfied with the location;

close to 70 percent were very satisfied with the service, facility, cleanliness and comfort; and 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 38.3 percent felt there was value for the money.
- Restaurants on O‘ahu continued to be the lowest rated attribute. Ratings in the fourth quarter of 2011 decreased 8.4 percentage points from a year ago, to 56.9 percent. Six out of ten U.S. visitors were very satisfied with the location, variety, service, and quality of O‘ahu restaurants but only 36.6 percent felt that there was value for the money.

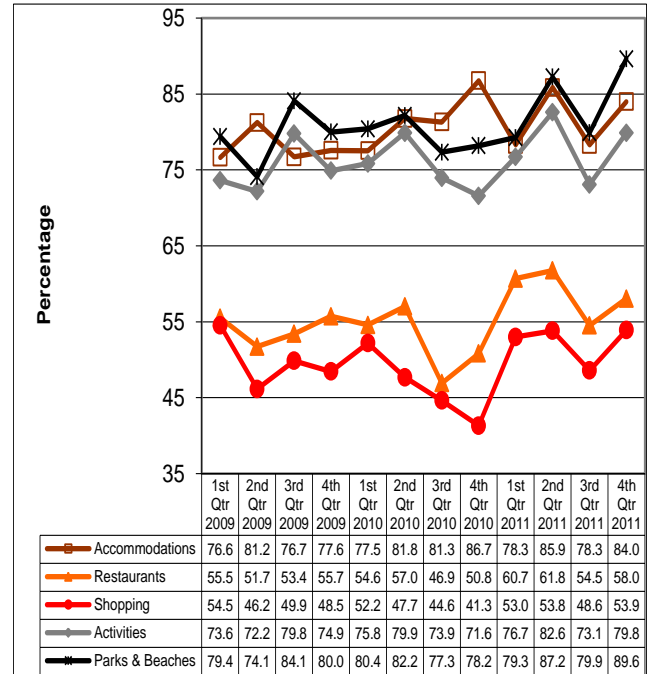
Figure 15: Detailed Satisfaction Ratings for U.S. Visitors to Maui [Percentage of U.S. visitors to Maui who were “Very Satisfied” with Attribute]



- In the fourth quarter of 2011, ratings for accommodations increased 7.9 percentage points to 86 percent, and were the highest rated attribute among U.S. visitors on Maui. The second highest attribute were parks and

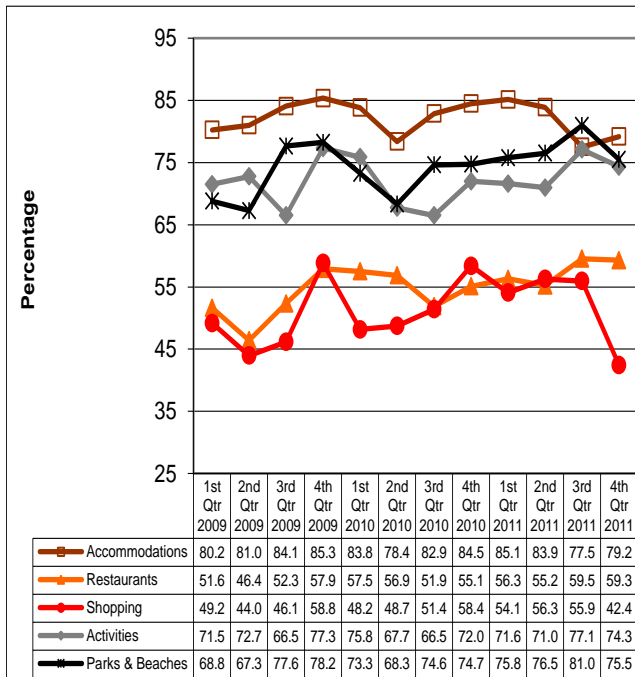
beaches (81.7%), followed by activities (78.3%) and restaurants (63%) (see Figure 15).

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]



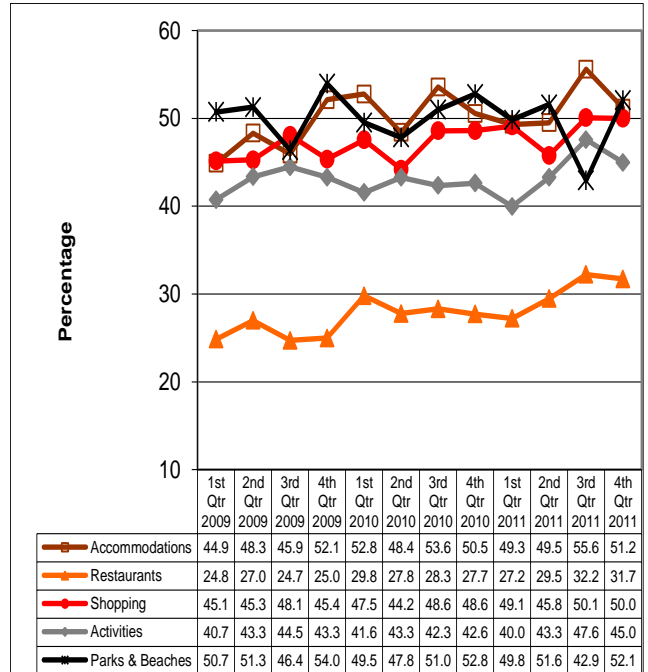
- In the fourth quarter of 2011, ratings for parks and beaches (89.6%) improved 11.4 percentage points from a year ago, and were the highest rated attribute among U.S. visitors on Kaua‘i. Accommodations (84%) was the second highest rated attribute followed by activities (79.8%). There was an 8.2 percentage point improvement in ratings for activities compared to the fourth quarter of 2010.
- Restaurants (58%) and shopping (53.9%) ratings on the island continued to be much lower than other attributes. Fourth quarter 2011 ratings on restaurants increased 7.2 percentage points compared to the fourth quarter of 2010. Rating for shopping rose 12.6 percent from a year ago (see Figure 16).

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]



- Accommodations (79.2%) were the highest rated attribute among U.S. visitors on Hawai'i Island in the fourth quarter of 2011, followed by parks and beaches (75.5%) and activities (74.3%). Ratings for these attributes were about the same as the fourth quarter of 2010 (see Figure 17)
- Similar to Kaua'i and Maui, U.S. visitors' ratings were much lower for Hawai'i Island's restaurants (59.3%) and shopping (42.4%) in the fourth quarter of 2011. Ratings for shopping decreased 16 percentage points compared to the fourth quarter of 2010.

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



- Consistent with a year ago, parks and beaches (52.1%) were the highest rated attribute among Japan visitors to O'ahu in the fourth quarter of 2011. Half of the Japan visitors were very satisfied with the security, while one out of three visitors was very satisfied with the facilities, cleanliness and comfort.
- Accommodations (51.2%) were the second highest rated attribute. Ratings for accommodations were also similar to the fourth quarter of 2010. The majority of Japan visitors were very satisfied with the location (57.6%). Four out of ten Japan visitors were very satisfied with the cleanliness and comfort, and value for the money. However, less than 35 percent were very pleased with the service and facility.
- Shopping (50%) was the third highest rated attribute. Six out of ten Japan visitors felt there were sufficient shopping places (61.5%); close to half of the visitors were very satisfied with the location and variety; but only about 30 percent were very satisfied with the service

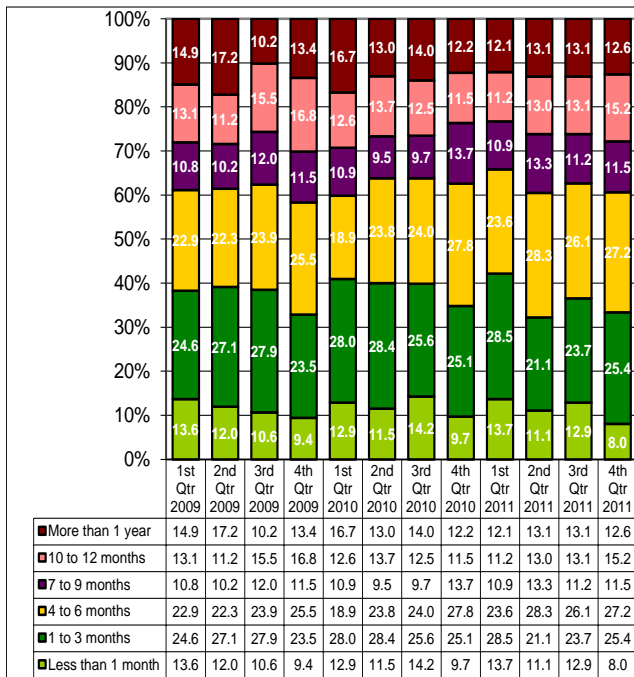
and quality, local/handmade items, or felt there was value for the money.

- Restaurants continued to be the lowest rated attribute. In the fourth quarter of 2011, 31.7 percent of Japan visitors were very satisfied with restaurants on O’ahu, similar to a year ago. Four out of ten Japan visitors were very satisfied with the location; about 30 percent were very satisfied with the variety, quality and service while less than 25 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.

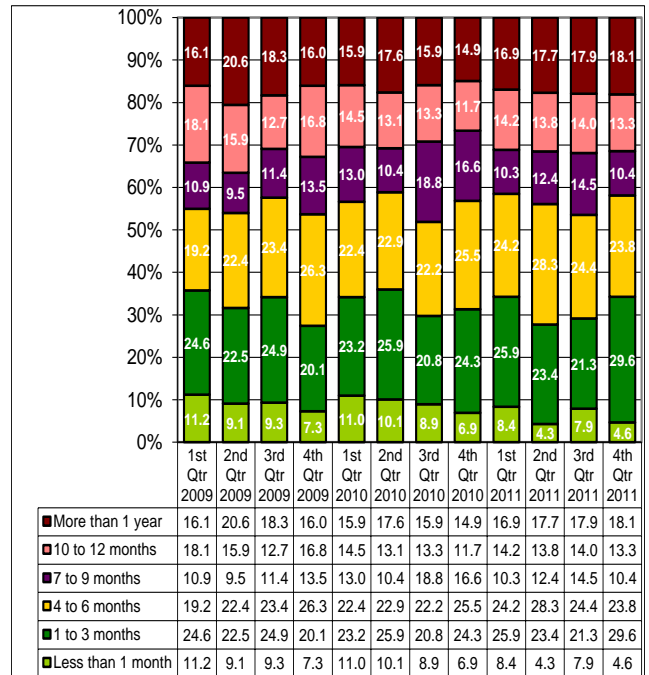
Figure 19: When Did U.S. West Visitors Decide to Visit Hawai’i in Advance of Departure [Percentage of U.S. West visitors]



- Similar to a year ago, the majority of U.S. West visitors (66.5%) in the fourth quarter of 2011 continued to make decisions to visit Hawai’i four months or more before arriving (see Figure 19).

- Two out of three U.S. West visitors in the fourth quarter of 2011 purchased package tours (65.4%) less than one month before departure. Seven out of ten U.S. West visitors made rental car reservations (72.5%) within three months or less. Three out of four U.S. West visitors made accommodation reservations (77%) six months or less before their visit.

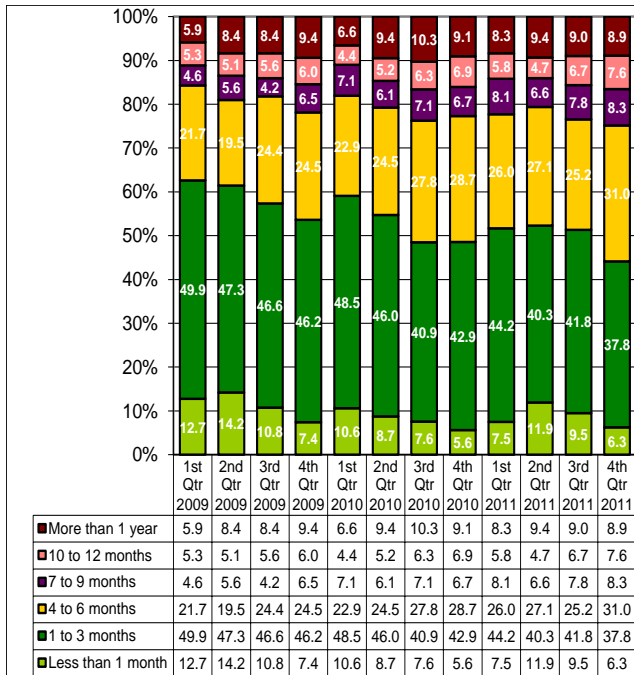
Figure 20: When Did U.S. East Visitors Decide to Visit Hawai’i in Advance of Departure [Percentage of U.S. East visitors]



- A larger percentage of U.S. East visitors made the decision to vacation in Hawai’i earlier than their U.S. West counterparts. Consistent with last year, 41.8 percent of U.S. East visitors in the fourth quarter of 2011 decided on Hawai’i at least seven months before arrival (see Figure 20).
- Eight out of ten U.S. East visitors in the fourth quarter of 2011 made accommodation reservations (79.6%) six months or less before coming to the islands.
- The majority of U.S. East visitors in the fourth quarter of 2011 made rental car reservations (67.7%) three months or less

prior to arriving. Over half of U.S. East visitors also purchased packaged tours (54.1%) 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]

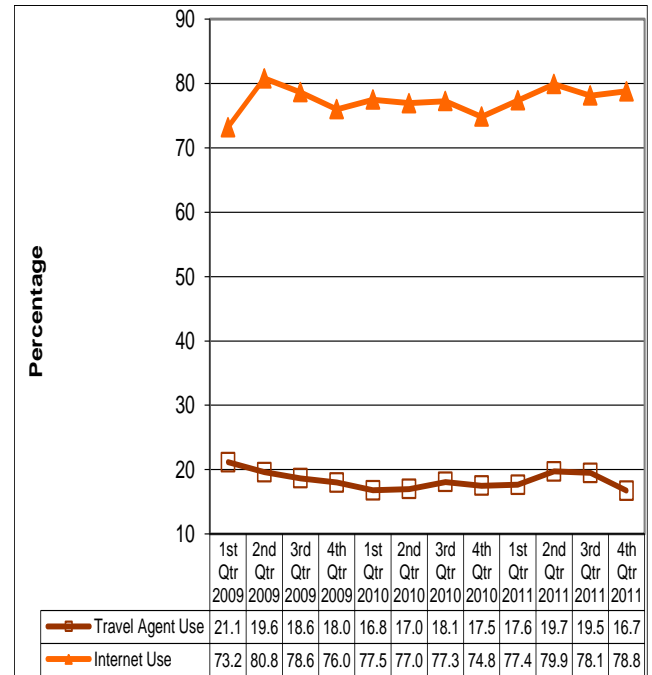


- Visitors from Japan continued to have a much shorter booking window than U.S. visitors. Similar to the same quarter last year, 44.1 percent of Japan visitors in the fourth quarter of 2011 decided to visit Hawai'i three months or less before departure (see Figure 21).
- Similar to the fourth quarter of 2010, 70.8 percent of Japan visitors in the fourth quarter of 2011 made accommodations reservations three months or less before departure (not shown in figure).
- Nine out of ten Japan visitors in the fourth quarter of 2011 made rental car reservations (87.8%) within three months before coming to the islands; while 58.1 percent purchased packages (58.1%) less than one month before (not shown in figure).

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]



- Consistent with the same quarter last year, 78.8 percent of U.S. visitors in the fourth quarter of 2011 used the Internet for trip planning purposes; while only 16.7 percent used travel agents (see Figure 22).
- In the fourth quarter of 2011, a slightly higher percentage of Japan visitors used the internet (59.3%) than used travel agents (58.3%) for trip planning purposes. These percentages were about the same compared to the fourth quarter of 2010 (see Figure 23).

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

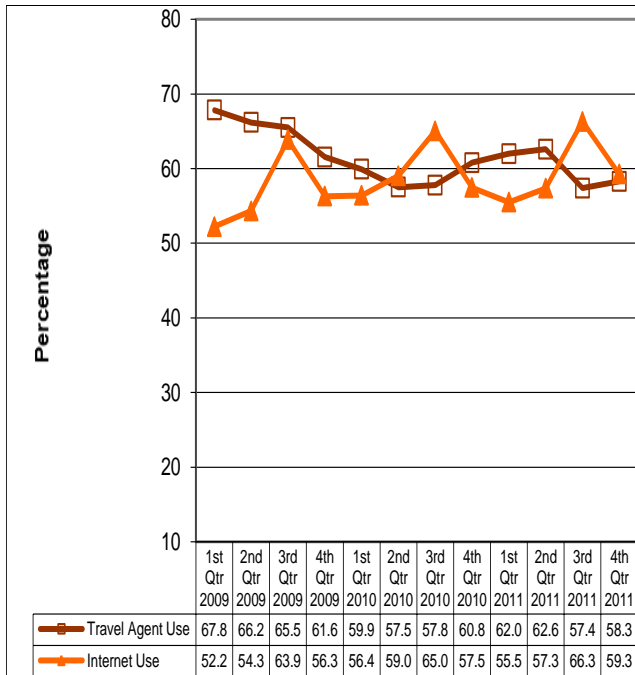
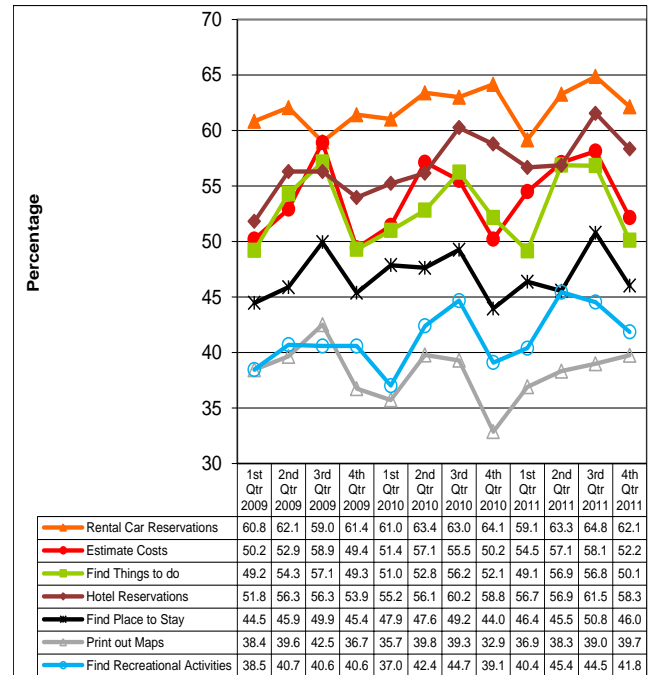


Figure 24: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]

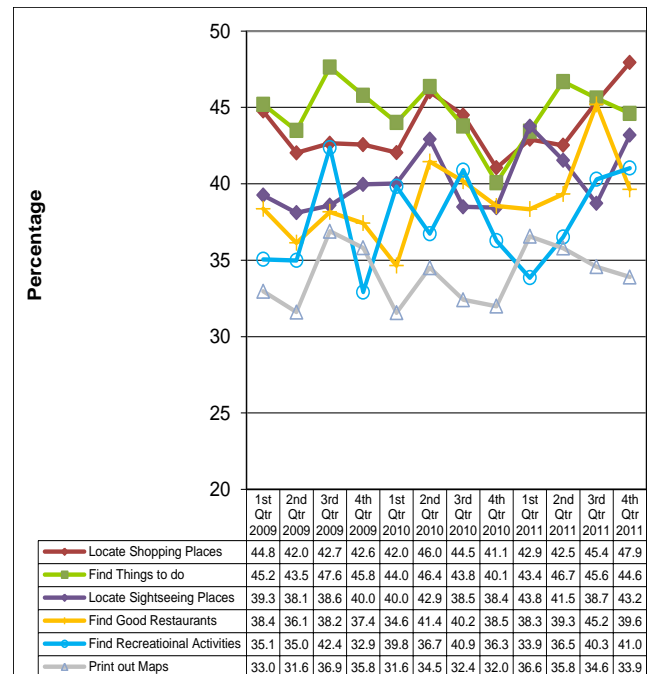


Internet Use

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

- Similar to a year ago, the majority (87.8%) of U.S. visitors who used the Internet in the fourth quarter of 2011 used it to make airline reservations (not shown in figure).
- In the fourth quarter of 2011, making rental car reservations continued to be the second most popular function among 62.1 percent of U.S. visitors who used the Internet, followed by making hotel reservations (58.3%), estimating costs (52.2%) and finding things to do (50.1%) (see Figure 24).

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

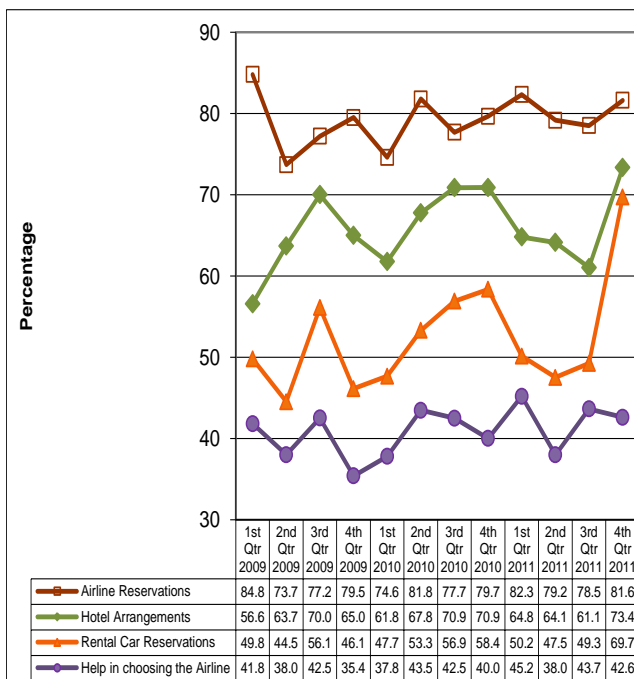


- Of the Japan visitors who used the Internet in the fourth quarter of 2011, 64.2 percent used it to find a place to stay. This percentage was 4.3 percentage points lower compared to the fourth quarter of 2010 (not shown in figure).
- The second most popular search among Japan visitors were to locate shopping places (+6.8 percentage points to 47.9%), followed by find things to do (+4.5 percentage points to 44.6%), and locate sightseeing places (+4.8 percentage points to 43.2%) (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).

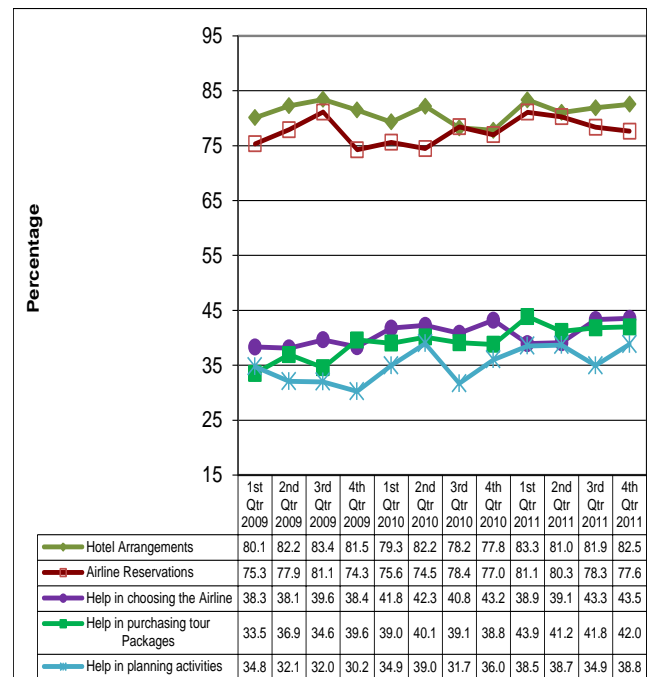
Figure 26: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]



- U.S. visitors mainly used travel agents to make airline reservations. Similar to the fourth quarter of 2010, 81.6 percent of U.S. visitors in the fourth quarter of 2011 made airline reservations through travel agents (see Figure 26).

- The second most popular use of travel agent among U.S. visitors was making hotel arrangements (73.4%).
- A much higher percentage of U.S. visitors in the fourth quarter of 2011 made rental car reservations (69.7%) through travel agents compared to the fourth quarter of 2010 (58.4%).

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



- In the fourth quarter of 2011, the most popular use of travel agents among Japan visitors continued to be for hotel arrangements (82.5%). This was a 4.7 percentage point increase compared to the fourth quarter of 2010. Making airlines reservations was the second most popular request among 77.6 percent of Japan visitors who used travel agents (See Figure 27).

DEFINITION AND SURVEY METHODOLOGY

Major Market Areas (MMA): The following are defined by the Hawai'i Tourism Authority (HTA) 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 fourth quarter of 2011, Visitor Satisfaction Survey forms were mailed to selected U.S., Japan, Canada, Europe and Oceania 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, Canada, Europe and Oceania samples were drawn from the completed In-Flight Survey forms and 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
October – December 2011**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% Confidence Interval
Japan	3,371	1,333	39.5%	+/- 2.09
U.S.	3,569	823	23.1%	+/- 3.00
Canada	2,792	716	25.6%	+/- 3.16

Due to the low number of samples achieved, data for Europe, Oceania, 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 HTA at (808) 973-2255.