

2012

Visitor Satisfaction  
Monitoring Report

Second Quarter  
(April – June)

HAWAII TOURISM

AUTHORITY

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# INTRODUCTION

This monitoring report presents selected preliminary statistics from the second quarter of the 2012 Visitor Satisfaction and Activity survey. The survey measures the opinions of visitors from the top four Major Market Areas (MMA), U.S. West, U.S. East, Japan, and Canada, regarding their satisfaction with Hawai'i as a visitor destination. 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.

## Revisions to the 2012 Survey Form:

The number of questions in the 2012 survey form was reduced effectively shortening the survey from eight pages with 33 questions to six pages with 26 questions. The shorter format was implemented to encourage visitor participation and completion of the survey. Questions were also updated to better reflect changing trends in consumer travel planning and travel behavior (see Definition and Survey Methodology).

## CONDITION OF VISITOR INDUSTRY

Total visitor arrivals by air in the second quarter (April - June) of 2012 grew 10.7 percent, compared to the second quarter of 2011, to 1,909,115 visitors.

Arrivals from U.S. West increased 5.1 percent to 827,309 visitors. U.S. East arrivals rose 5.8 percent to 436,533 visitors. More visitors also came from Canada (+2.4% to 86,272) compared to the second quarter of 2011. Arrivals from Japan rebounded from the March 2011 earthquake and tsunami with a 27.8 percent growth to 309,042 visitors. The average length of

stay for all visitors to the state was 9.33 days, compared to 9.18 days in the second quarter of 2011.

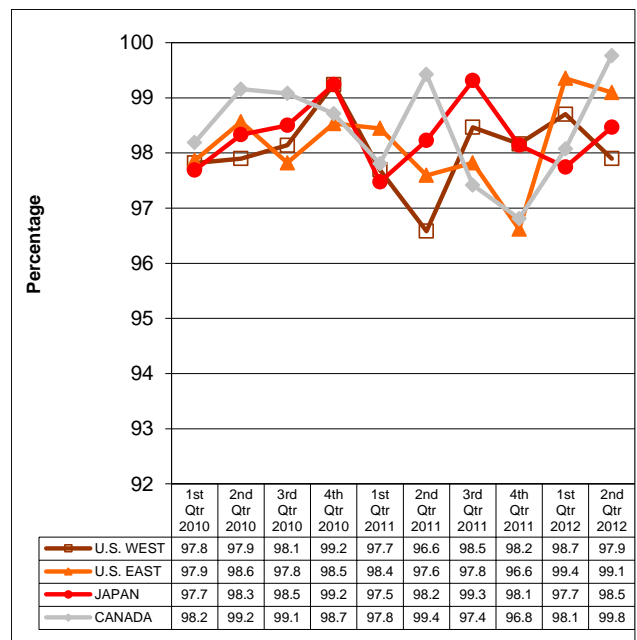
# RESULTS

## 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 an affinity for the destination which results in a higher likelihood to recommend Hawai'i to others.

## Satisfaction with Vacation to Hawai'i

**Figure 1: Overall Rating of Trip**  
[Percentage of visitors who were "satisfied" with their most recent trip by MMA]



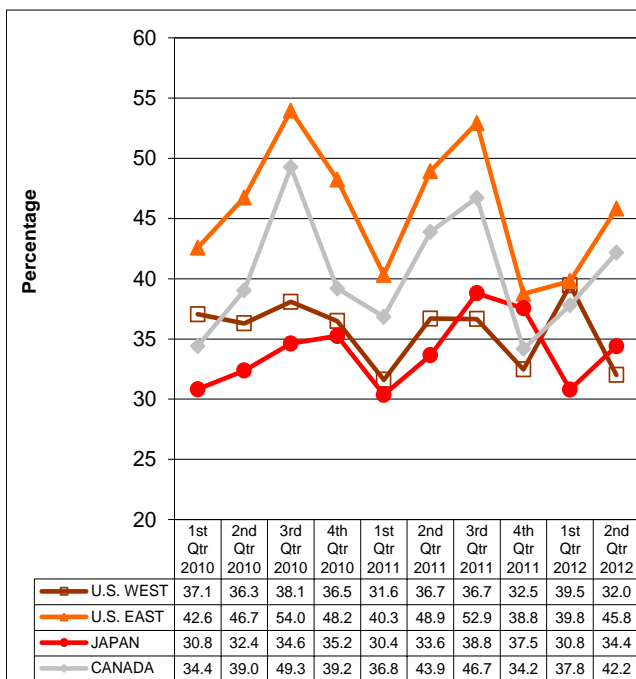
- Since 2008, over 95 percent of respondents from U.S. West, U.S. East, Japanese and Canada have been satisfied with their overall experience in Hawai'i. A rating of satisfied is

a combination of excellent and above average responses (see Figure 1).

- Satisfied ratings from U.S. West (97.9%), U.S. East (99.1%), Japanese (98.5%) and Canadian (99.8%) in the second quarter of 2012 were consistent with the same quarter last year.

## Exceeded Expectations

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



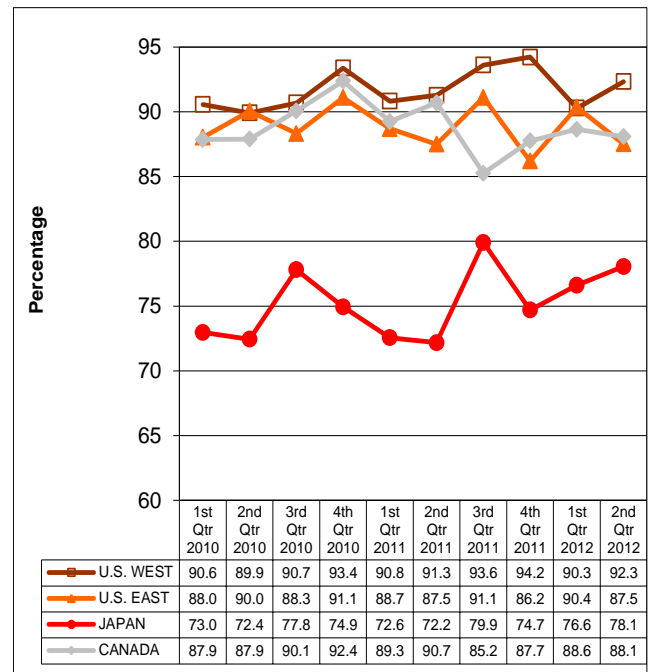
The visitors' evaluation of their trip is influenced not only by the attributes and characteristics of the service but also by the needs, motivations, and interests of the visitors. Therefore, it is important to measure how well the destination was able to provide the experience that was expected. Overall,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

- The percentage of U.S. West visitors who said their recent trip to Hawai'i exceeded expectations was lower in the second quarter of 2012 (-4.7 percentage points to 32%) compared to a year ago.

- The percentages of U.S. East (45.8%) Canadian (42.2%), and Japanese (34.4%) visitors who said their Hawai'i trip exceeded expectations were similar to the second quarter of 2011.

## Very Likely to Recommend Hawai'i

**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]



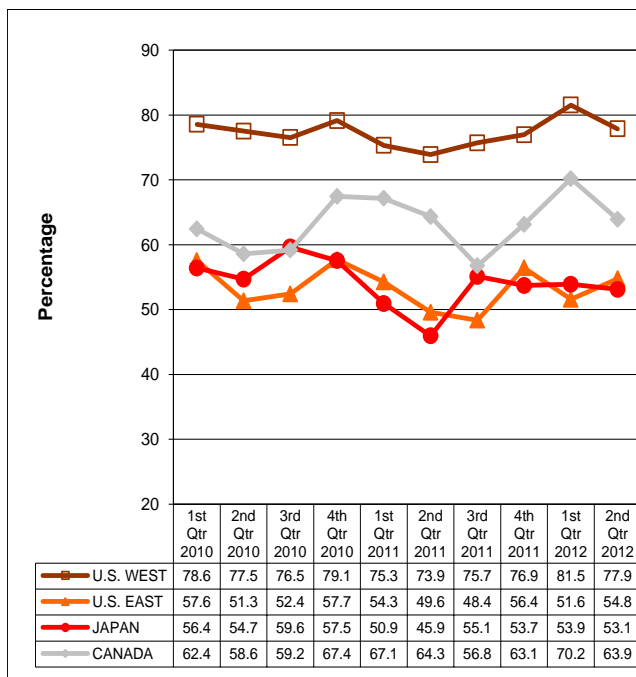
When visitors are highly satisfied with their trip, they are more likely to recommend the destination to friends and family. Many Hawai'i visitors responded that they would be *very likely to recommend* this destination to others. Word-of-mouth advertising is important in marketing Hawai'i. These referrals, 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 Japanese visitors, and nine out of ten U.S. West, U.S. East and Canadian visitors responded that they would be very likely to recommend Hawai'i to friends and relatives (see Figure 3).

- A higher percentage of Japanese visitors in the second quarter of 2012 (+5.9 percentage points to 78.1%) would very likely recommend Hawai'i compared to the same quarter last year.
- Second quarter 2012 ratings from U.S. West (92.3%), Canadian (88.1%) and U.S. East (87.5%) visitors were about the same as the second quarter of 2011.

## Likelihood to Revisit Hawai'i

**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]

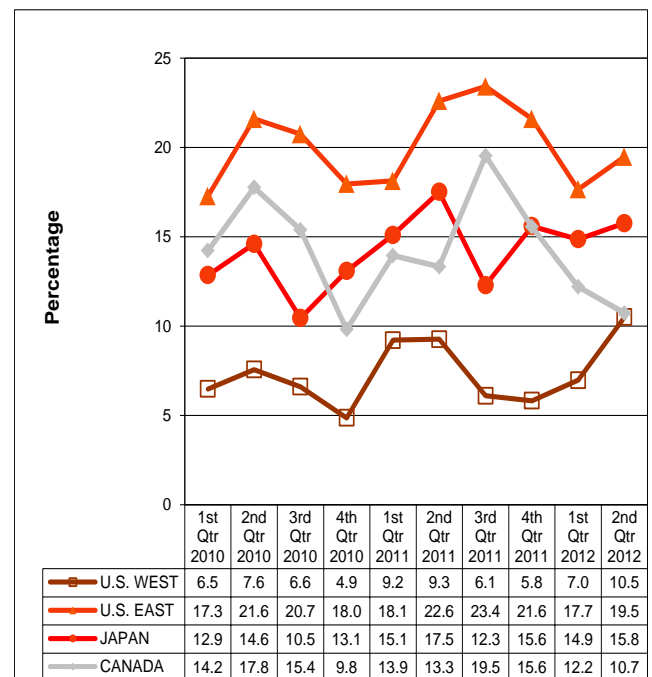


A visitor's decision to return to Hawai'i is influenced by positive experiences on their most recent trip and other factors such as curiosity for new experiences, available time, financial situation, and other commitments. **Likelihood to revisit Hawai'i**, as an indicator, helps to estimate future demand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

- Compared to the second quarter of 2011, a higher percentage of Japanese (+7.2 percentage points to 53.1%), U.S. East (+5.2 percentage points to 54.8%) and U.S. West (+4 percentage points to 77.9%) visitors in the second quarter of 2012 said they will **very likely** return to the islands in the next five years (see Figure 4).
- The percentages of Canadian (63.9%) visitors in the second quarter of 2012 who would very likely come back were similar to a year ago.

## Not Likely to Revisit Hawai'i

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



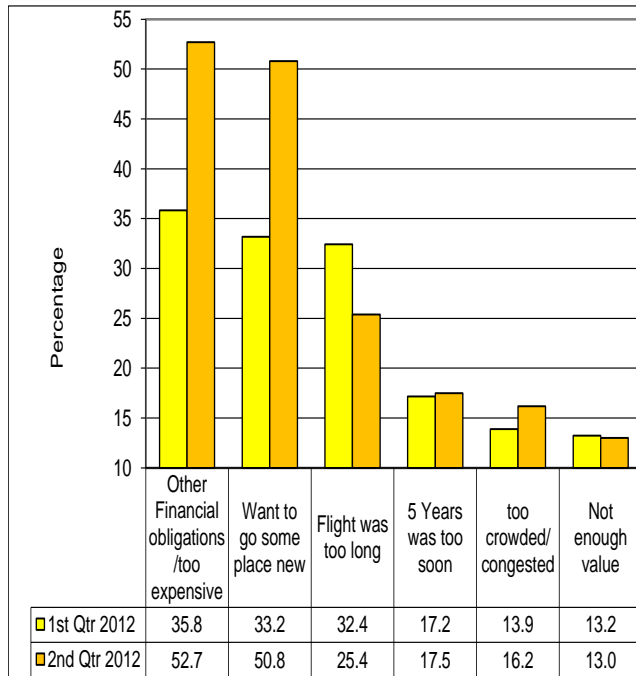
- In the second quarter of 2012, U.S. East visitors (19.5%), more so than Japanese (15.8%), Canadian (10.7%) and U.S. West (10.5%) visitors, continued to respond that they would not likely return to Hawai'i in the next five years (see Figure 5).

- Over the last several quarters, the likelihood of returning to Hawai'i have improved among Canadian respondents; but have declined among respondents from U.S. West.

## Reasons for Not Revisiting Hawai'i

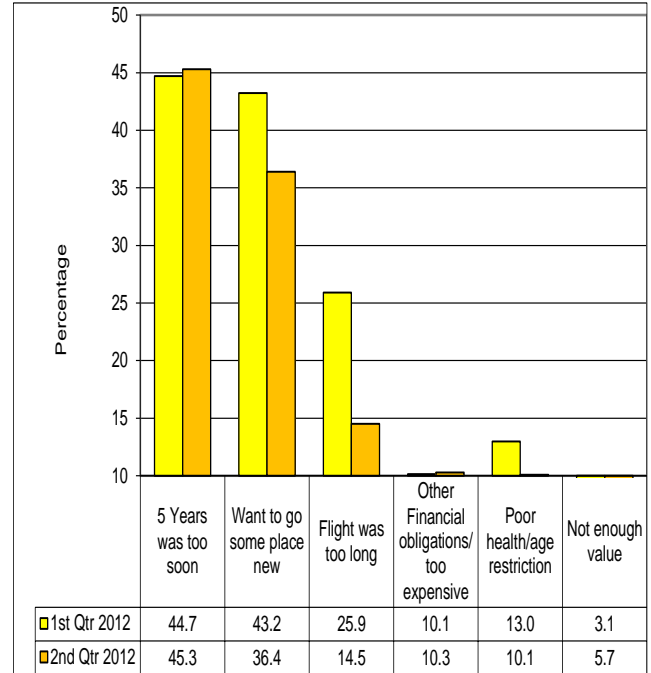
Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were *not likely to revisit Hawai'i in the next five years* (from previous section).

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



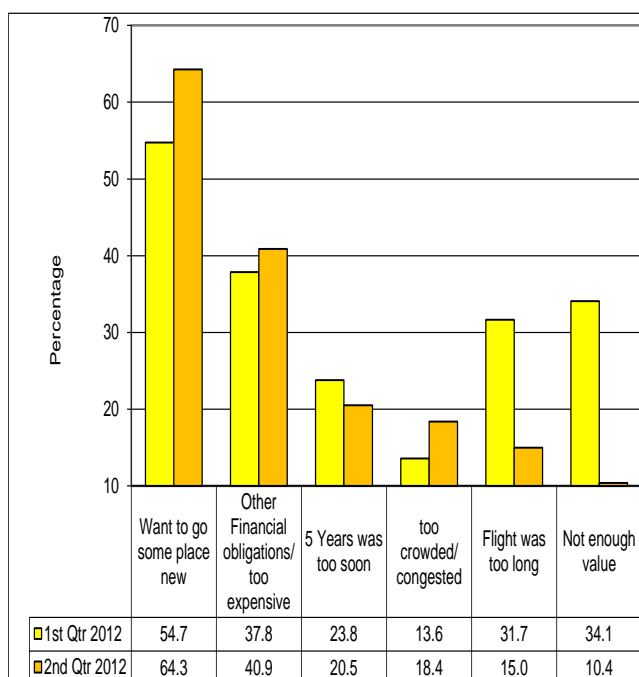
- U.S.:** Among U.S. respondents in the second quarter of 2012, over half said that they will not be returning because of other financial obligations/too expensive (52.7%); or because they want to go someplace new (50.8%). A quarter of the respondents said that the flight was too long (25.4%). Some of the respondents said five years was too soon to revisit (17.5%); Hawai'i was too crowded/congested (16.2%); or there was not enough value for the price (13%) (see Figure 6).

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



- Japan:** Among Japanese visitors in the second quarter of 2012, the two major reasons for not returning to the islands were: five years was too soon to revisit (45.3%), and want to go someplace new (36.4%). One out of ten Japanese respondents said that the flight was too long (14.5%). In contrast to U.S. visitors, a much lower percentage of Japanese visitors listed other financial obligations/too expensive (10.3%) as a reason for not revisiting Hawai'i. Some listed poor health/age restriction/getting too old (10.1%) as a reason. Only 5.7 percent said there was not enough value for the price (see Figure 7).

**Figure 8: Reasons for Not Revisiting Hawai'i – Canada**  
[Percentage of visitors who were not likely to revisit]

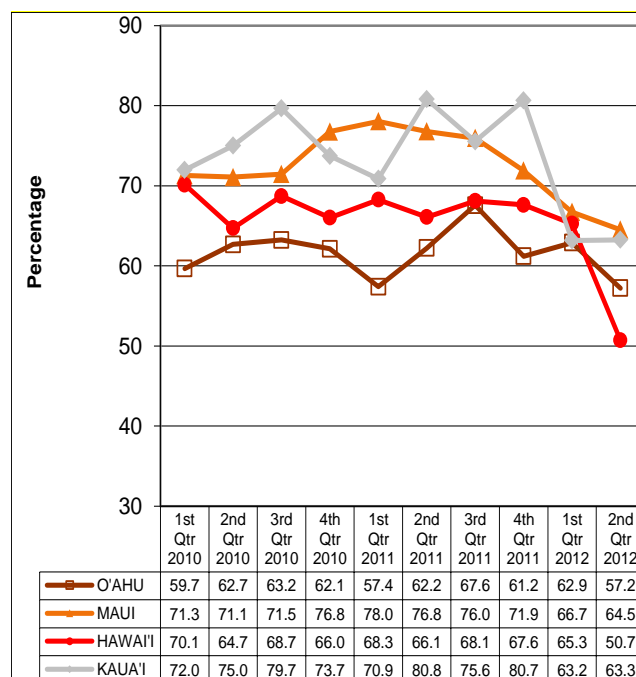


- **Canada:** Three out of five Canadian respondents in the second quarter of 2012 said that they will not revisit because they want to go someplace new (64.3%); while 40.9 percent listed other financial obligations/too expensive. Other reasons were: five year was too soon to revisit (20.5%); too crowded/congested (18.4%); or the flight was too long (15%). One out of ten said there was not enough value for the price (10.4%) (see Figure 8) .

## Individual Island Experience

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

**Figure 9: Island Experience Rated as Excellent – U.S.**  
[Percentage of visitors by Island]

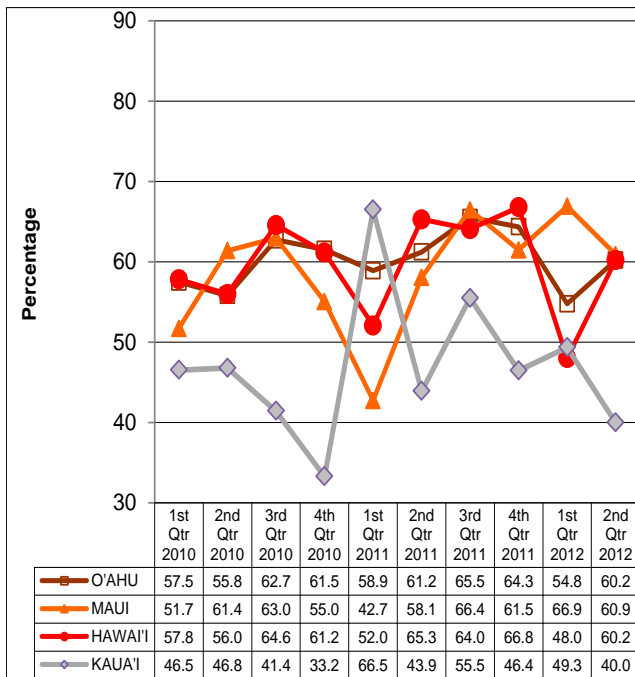


- A much lower percentage of U.S. visitors in the second quarter of 2012, gave **excellent** ratings for Kaua'i (-17.5 percentage points to 63.3%) (see Figure 9). Rather, more U.S. visitors rated Kaua'i **above average** (29.7%) compared to the second quarter of 2011 (16.7%).
- The percentage of **excellent** ratings by U.S. visitors for Hawai'i Island (-15.4 percentage points to 50.7%) declined compared to the second quarter of 2011; while **above average** ratings increased (+19.9 percentage points to 47.5%).



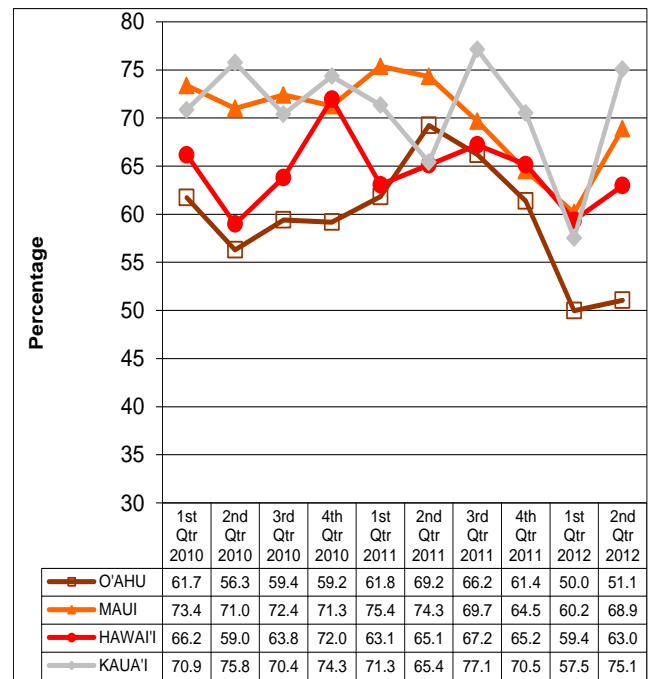
- *Excellent* ratings for Maui decreased (-12.3 percentage points to 64.5%), but *above average* ratings were higher (+12.7 percentage points to 33.8%) than the second quarter of 2011.
- *Excellent* ratings for O’ahu (-5 percentage points to 57.2%) fell; while *above average* ratings (37.5%) were similar to the same quarter last year.

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



- Japanese visitors’ *excellent* ratings for Hawai’i Island dropped 5.1 percentage points to 60.2 percent in the second quarter of 2012 (see Figure 10).
- *Excellent* ratings from Japanese visitors for Maui (60.9%), O’ahu (60.2%) and Kaua’i (40%) in the second quarter of 2012 were comparable to last year.

Figure 11: Island Experience Rated as Excellent – Canada  
[Percentage of visitors by Island]



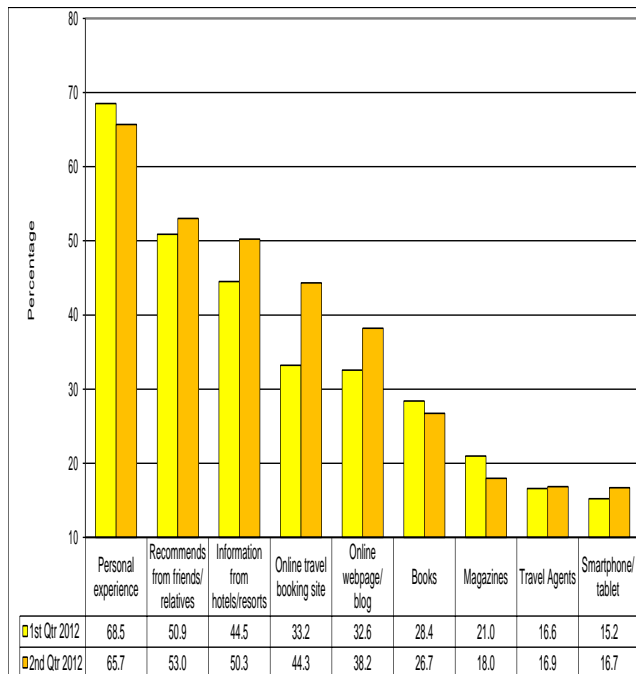
- Among Canadian visitors, O’ahu’s *excellent* rating (51.1%) in the second quarter of 2012 was down 18.1 percentage points from the second quarter of 2011 (see Figure 11). A higher percentage of Canadian visitors rated O’ahu *above average* (+19.1 percentage points to 48.3%) compared to the same period in 2011.
- Canadian visitors’ *excellent* ratings for Kaua’i improved 9.7 percentage points to 75.1 percent.

## Information Sources for Trip Planning

Sources of information used for trip planning and booking differ greatly between U.S. and Japanese visitors in the second quarter of 2012.

### U.S. Visitors

**Figure 12: Sources of Information Used for Trip Planning - [Percentage of U.S. visitors]**



- Two out of three U.S. visitors relied on personal experience (65.7%) when planning their trip to Hawai'i. About half sought recommendations from friends or relatives (53%); or requested information from hotels and resorts (50.3%) (see Figure 12).
- Four out of ten U.S. visitors used online travel booking sites (44.3%) or researched online webpage/blog covering Hawai'i (38.2%).
- A few used travel books (26.7%), magazines (18%), or smartphone/tablet (16.7%).

- Many U.S. visitors used the sources listed above to research their trip to Hawai'i prior to their arrivals. After arriving in the islands, a few U.S. visitors also used magazines (6.9%), information from hotels/resort (4.8%), books (4.4%), smart phone/tablet application (3.9%), newspapers (3.6%), recommendations from friends/relatives (3.2%), and information from companies specializing in packaged tours (2.7%) to plan their activities.

### Travel Agent Usage by U.S. Visitors:

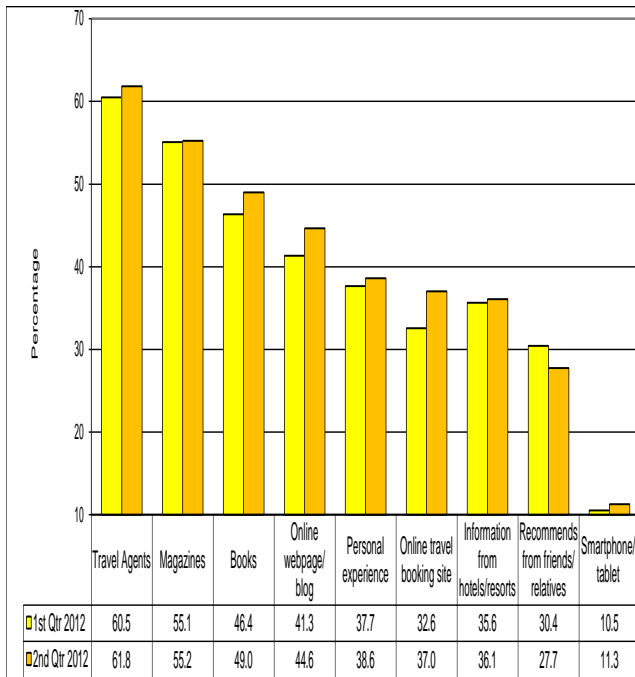
- In the second quarter of 2012, 16.9 percent of U.S. visitors used travel agents in planning their trip to the islands, similar to the second quarter of 2011 (17.7%).
- Among U.S. visitors who used travel agents in the second quarter of 2012, the most common purposes were for hotel/lodging reservation (57.4%), airline reservation (55.7%), choosing airlines (54.4%), car rental (53.9%) and estimation cost of trip (39.9%).

### Japanese Visitors

- In contrast to U.S. Visitors, 61.8 percent of Japanese visitors in the second quarter of 2012, used travel agents in planning their trip to Hawai'i. This was consistent with the second quarter of 2011 (63%).
- A much higher percentage of Japanese visitors used magazines (55.2%), travel books (49%) and/or went to online webpage/blog covering Hawai'i (44.6%), compared to their U.S. counterparts (see Figure 13).
- Fewer Japanese visitors relied on personal experience (38.6%), went to online travel booking sites (37%) or requested information from hotels and resorts (36.1%) compared to U.S. visitors.



**Figure 13: Sources of Information Used for Trip Planning - [Percentage of Japanese visitors]**



- In addition, fewer Japanese visitors sought recommendations from friends or relatives (27.7%) and/or used smartphone/tablet (11.3%) than U.S. visitors.
- After arriving in the islands, some Japanese visitors used information from hotels/resort (4.1%), travel agents (3.1%), magazines (2.2%), smart phone/tablet application (1.4%), newspapers (1.4%) to plan their activities.

**Travel Agent Usage by Japanese Visitors:**

- Among the 61.8 percent of Japanese visitors in the second quarter of 2012 who used travel agents, the most common requests were for assistance with airlines reservation (77.2%), hotel reservation (72.6%), choosing airlines (65.6%), estimating cost of trip (65.6%) and deciding on a vacation destination (60%). Nearly half of the respondents also used travel agents to assist with purchasing tour/attraction package (46.1%); or with airport check-in (45.4%).

**DEFINITION AND SURVEY METHODOLOGY**

The Visitor Satisfaction and Activity Survey is a monthly survey mailed to visitors who recently completed a trip to Hawaii. Monthly samples of visitors who stayed for at least two days were drawn from completed Domestic In-Flight and International Departure Survey databases. Visitors may respond by mail or Internet.

VSAT surveys were mailed each week to visitors from each Major Market Area (MMA). Quarterly data are reported for visitors from the four larger MMAs: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other States in the Continental U.S), Japan, and Canada. Sample sizes for other MMAs (Europe, Oceania, China and Korea) were insufficient to support accurate reporting by quarter and will be covered in the annual visitor satisfaction and activity report. Survey forms in the English, Japanese, Chinese, and Korean languages were mailed to visitors from those MMAs.

**Revisions to the Survey:** The VSAT survey instrument was revised for 2012. Several rarely used items were eliminated. Response scales for some items were changed. Most notably the response scale for the main satisfaction question was changed from a four-point scale to an eight-point scale. Questions on booking times, Internet use, and sources of travel information were changed to gather more detailed data. The elements of the activities list were altered very slightly. The effects of those survey changes are being monitored throughout the year and 2012 annual report will discuss them in detail.

**Table 1: Survey Response  
April – June 2012**

MMA	Mailed	Received	Rate	Error
US West	2,725	674	24.7	3.8
US East	3,432	861	25.1	3.3
Canada	1,937	502	25.9	4.4
Japan	3,155	1,072	34.0	3.0
Europe	1,465	336	22.9	5.3
Oceania	663	183	27.6	7.2
China	135	21	15.6	n.a.
Korea	296	16	5.4	n.a.
Total	13,808	3,665	26.5	2.1

The number of surveys mailed in the second quarter was 13,808 and will not change over time. About 3,665 surveys were received by October 15, 2012 and that number will increase slightly for the year. The current response rate was about 27 percent for the second quarter with a margin of error of plus-or-minus 2.1 percentage points at the 95 percent confidence level. Response rates for Japan continue to be higher than for other MMAs and our experiment with VSAT for China and Korea has not yet resulted in significant data.

Data collected in online surveys were merged with mailed survey data to form a single database for analysis. Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys.

This report covers surveys mailed between April and June, 2013. Data are statistically adjusted to be representative of the population of visitor parties entering Hawaii during that time period. Results are presented only for classifications (MMA, islands visited, ports of entry, types of visitors, etc.) for which sample sizes are large enough to produce statistics with sample error estimates less than 10 points.

For further information about obtaining visitor data, contact the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email [research@hawaiiitourismauthority.org](mailto:research@hawaiiitourismauthority.org).