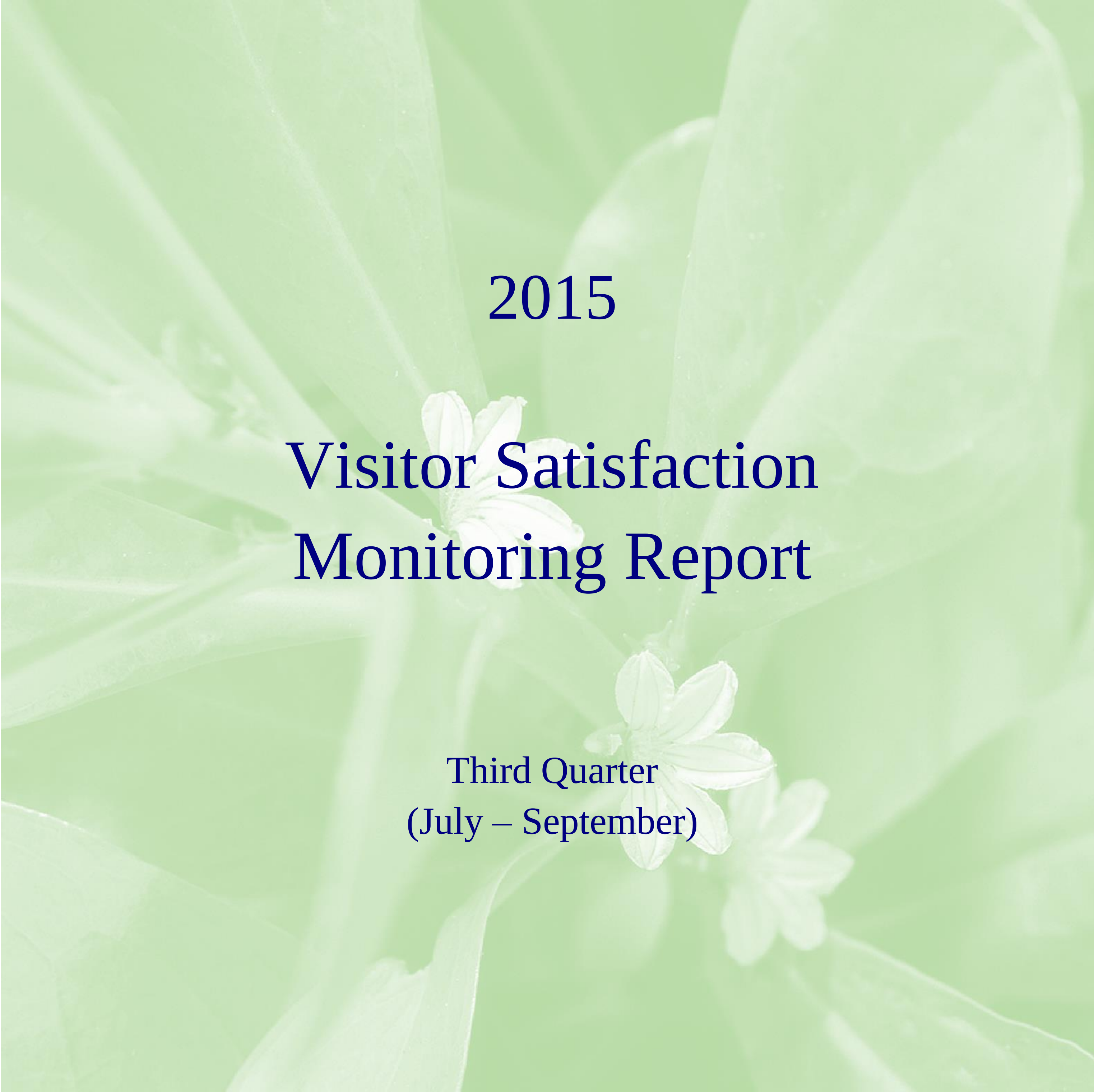

2015

Visitor Satisfaction Monitoring Report

Third Quarter
(July – September)

HAWAI'I TOURISM AUTHORITY

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INTRODUCTION

This quarterly monitoring report presents selected preliminary statistics from the third quarter of the 2015 Visitor Satisfaction and Activity (VSAT) Survey. The survey measures the opinions of visitors from six Major Market Areas (MMAs): U.S. West, U.S. East, Japan, Canada, Europe and Oceania, regarding their satisfaction with Hawai'i as a visitor destination.

The VSAT 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, and satisfaction by island.

Condition of Visitor Industry

There were 2,197,805 visitors who arrived by air to the Hawaiian Islands in the third quarter (July – September) of 2015, which was a 3.8 percent growth compared to the third quarter of 2014. Arrivals from U.S. West increased 5.4 percent to 916,236 visitors while U.S. East arrivals rose 2.6 percent to 441,961 visitors. Japanese arrivals grew slightly (+0.8%) to 428,803 visitors. Canadian arrivals of 75,707 was up 7.8 percent from a year ago. Arrivals from Oceania increased 3.6 percent to 115,399 visitors. Arrivals from Europe of 48,871 visitors (+0.4%) was similar to the third quarter of 2014. The average length of stay for all visitors to the state was 8.84 days, virtually unchanged from last year.

Arrivals increased on O'ahu (+2% to 1,414,709 visitors), Maui (+5.9% to 636,065 visitors), Hawai'i Island (+3.5% to 379,255 visitors) and Kaua'i (+3.1% to 303,945) compared to the third quarter of 2014.

VISITOR SATISFACTION RATINGS

Visitor satisfaction is an important indicator of industry performance. Because it is based on visitor evaluations, it provides vital feedback concerning how well services are delivered in Hawai'i. Satisfying visitors' needs and expectations encourages return trips to the islands. Satisfied customers also develop a fondness for the destination and tend to share their favorable assessment with others. Figure 1 Overall Ratings of Trip, shows the percent of respondents who rated their trip as ***excellent*** (7 or 8, on an 8-point scale). The majority of visitors from the six MMAs continued to give the highest marks for their overall experience in Hawai'i.

Figure 1: Overall Rating of Trip

(Percentage of respondents who rated their most recent trip "excellent" by MMA)

	2013				2014				2015P		
MMA	*Q1 2013*	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
U.S. West	75	82	82	80	82	82	82	81	83	83	84
U.S. East	80	86	89	85	82	85	84	84	88	89	85
Japan	69	69	74	69	63	69	74	69	69	70	72
Canada	81	86	88	83	80	84	86	86	83	82	83
Europe	87	88	83	81	77	82	91	85	86	87	90
Oceania	85	79	76	74	77	79	79	73	81	78	90

P=Preliminary

In the third quarter of 2015, 90 percent of European and Oceania respondents, over 80 percent of U.S. West, U.S. East and Canadian respondents, and over 70 percent of Japanese respondents, rated their most recent trip to Hawai'i as excellent. Ratings by respondents from Oceania improved 11 points compared to the third quarter of 2014.

Figure 2: Overall Rating of Trip

(Percentage of visitors who rated their most recent trip as "excellent" by MMA, 3-month moving average)

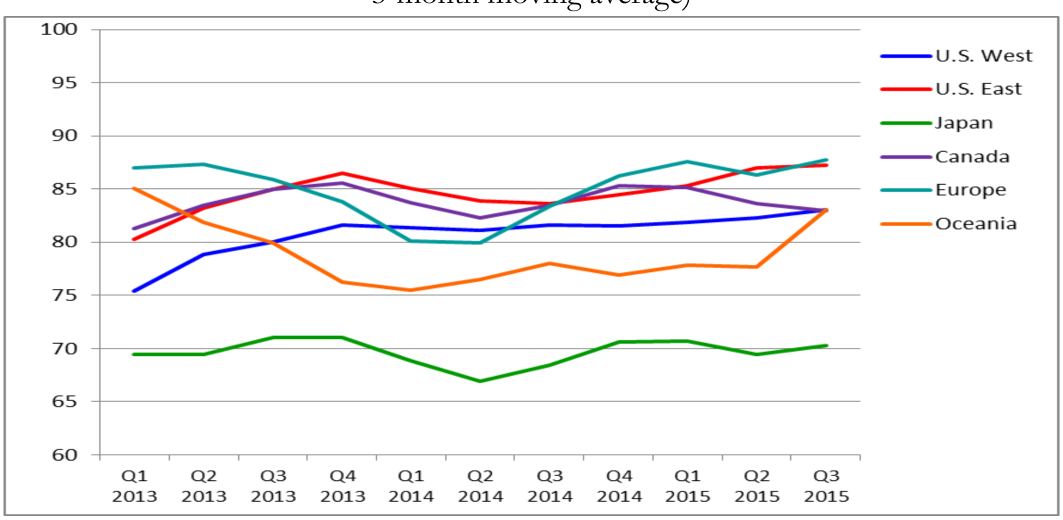


Figure 2 shows the trend lines for overall satisfaction of respondents in each MMA. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which represents the calculated average of first and second quarter 2013 ratings for each MMA.

Overall satisfaction ratings by U.S. West respondents have remained fairly consistent since the fourth quarter of 2013, resulting in a flat trend line. Ratings by Canadian and Oceania respondents matched U.S. West ratings in third quarter 2015, but Canadian ratings trended down while Oceania ratings trended up. Ratings by U.S. East respondents have been increasing since the third quarter of 2014. The trend line for Japanese respondent have been fairly stable in recent quarters.

Exceeded Expectations

Visitors' satisfaction is largely influenced by the level of service they received and by visitors' own needs, interests, and expectations. Therefore, it is important to measure how well the destination is able to provide the expected experience. Overall, Hawai'i's ability to ***exceed expectations*** continues to be strong and consistent. Few visitors (6% or less) felt that Hawai'i "did not meet their expectations" at all.

Figure 3: Trip Exceeds Expectations

(Percentage of visitors who said this trip "Exceeded Expectations" by MMA)

	2013				2014				2015P		
MMA	*Q1 2013*	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
U.S. West	37	39	41	36	33	34	38	34	36	38	37
U.S. East	44	51	53	47	45	53	51	46	43	52	47
Japan	31	29	35	33	29	31	35	36	34	34	35
Canada	36	43	51	41	35	46	54	39	37	45	44
Europe	48	51	53	46	48	40	55	52	56	54	51
Oceania	44	40	38	38	38	33	37	40	43	40	31

P=Preliminary

In the third quarter of 2015, ratings by Canadian respondents declined 10 points while ratings by Oceania respondents dropped 6 points compared to the same quarter last year.

Figure 4: Trip Exceeds Expectations

(Percentage of visitors who said this trip "Exceeded Expectations" by MMA, 3-month moving average)

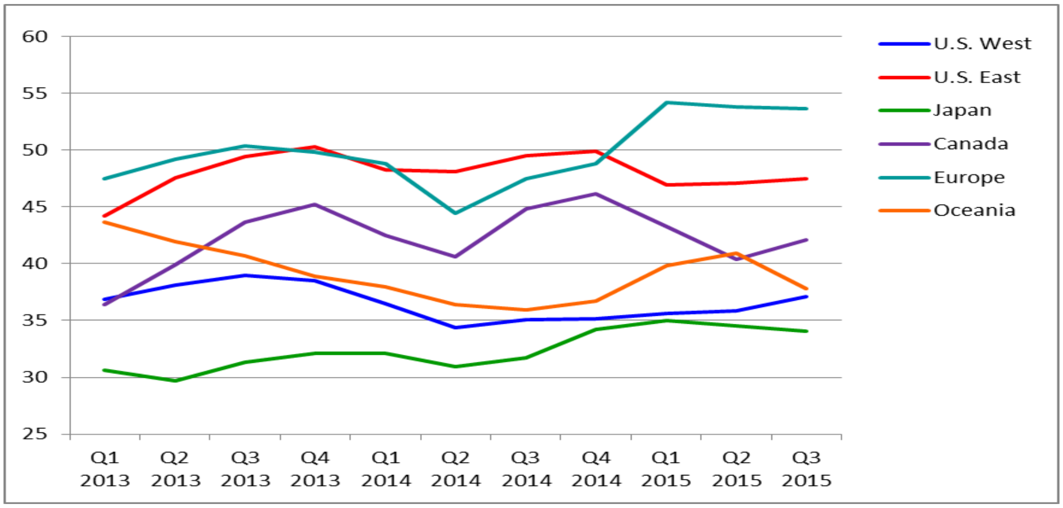


Figure 4 shows the longer-range pattern of change for this measure of satisfaction. Overall, scores on the "exceeding expectations" satisfaction indicator tend to be lower than typical scores on the other satisfaction indicators. "Exceeding expectations" is a higher standard for satisfaction, and, over the last 11 quarters, between 30 and 55 percent of all respondents have chosen the highest rating for this question.

Ratings by U.S. East, Japanese and European respondents have been fairly stable since the first quarter of 2015. After trending down in previous quarters, ratings from Canadian respondents increased in the third quarter of 2015. Ratings by Oceania respondents dropped in the most recent quarter after increases between third quarter 2014 and second quarter 2015.

Very Likely to Recommend Hawai‘i

Visitors who are highly satisfied with their trip are more likely to recommend their destination to friends and family. Relatively high percentages of visitors to Hawai‘i have reported that they would be ***very likely to recommend*** this destination to others. Less than 5 percent of visitors from each markets were "not too likely" or "not at all likely" to recommend Hawai‘i.

Figure 5: Very Likely to Recommend Hawai‘i to Friends and Relatives

(Percentage of visitors who are "Very Likely" to recommend Hawai‘i by MMA)

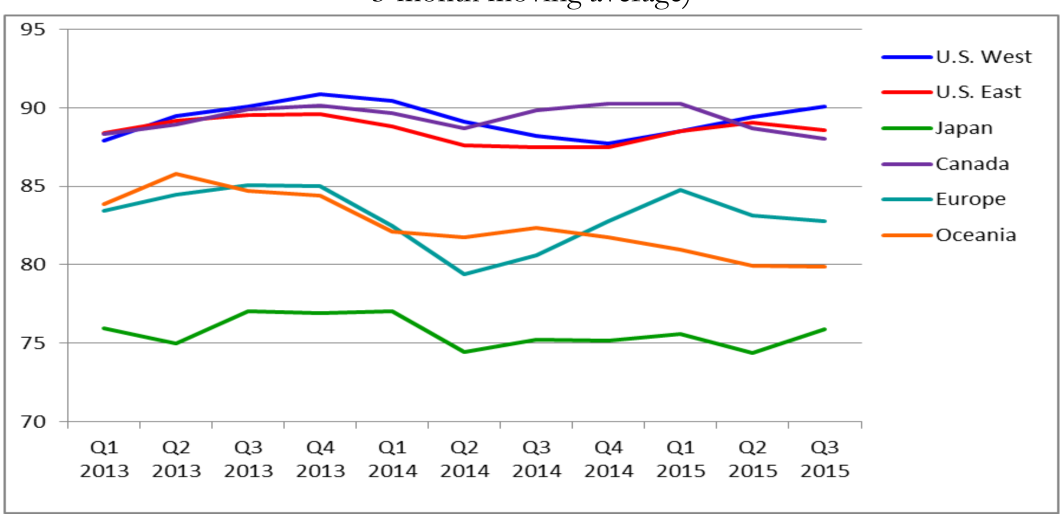
	2013				2014				2015P		
MMA	*Q1 2013*	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
U.S. West	88	91	91	90	90	87	88	88	90	91	90
U.S. East	88	90	90	89	87	87	88	87	90	90	86
Japan	76	74	81	76	74	73	78	74	75	74	79
Canada	88	90	92	89	88	89	93	90	89	88	88
Europe	83	86	86	83	78	77	87	84	83	82	83
Oceania	84	88	83	83	81	82	85	79	79	82	79

P=Preliminary

Respondents from most visitor markets showed similar ratings of willingness to recommend Hawai‘i between the third quarters of 2014 and 2015. The exceptions were Oceania and Canadian respondents who showed decreased ratings by 6 points and 5 points, respectively.

Figure 6: Very Likely to Recommend Hawai‘i to Friends and Relatives

(Percentage of visitors who are "Very Likely" to recommend Hawai‘i by MMA, 3-month moving average)



U.S. and Canadian respondents continued to show the highest overall willingness to recommend Hawaiʻi. Respondents from Oceania and Europe provided mid-range ratings of willingness to recommend. Japan continued to report the lowest willingness to recommend Hawaiʻi to friends and family. Trend lines for U.S. East, Canadian and European respondents showed slight decreases in third quarter 2015 while ratings by U.S. West and Japanese respondents were trending up.

Likely to Revisit Hawaiʻi in the Next Five Years

The satisfaction indicator ***Likelihood to Revisit Hawaiʻi*** is useful in estimating future demand and predicting numbers and characteristics of repeat visitors.

Figure 7: Very Likely to Revisit Hawaiʻi in the Next Five Years

(Percentage of visitors who are "Very Likely" to revisit Hawaiʻi in the next five years by MMA)

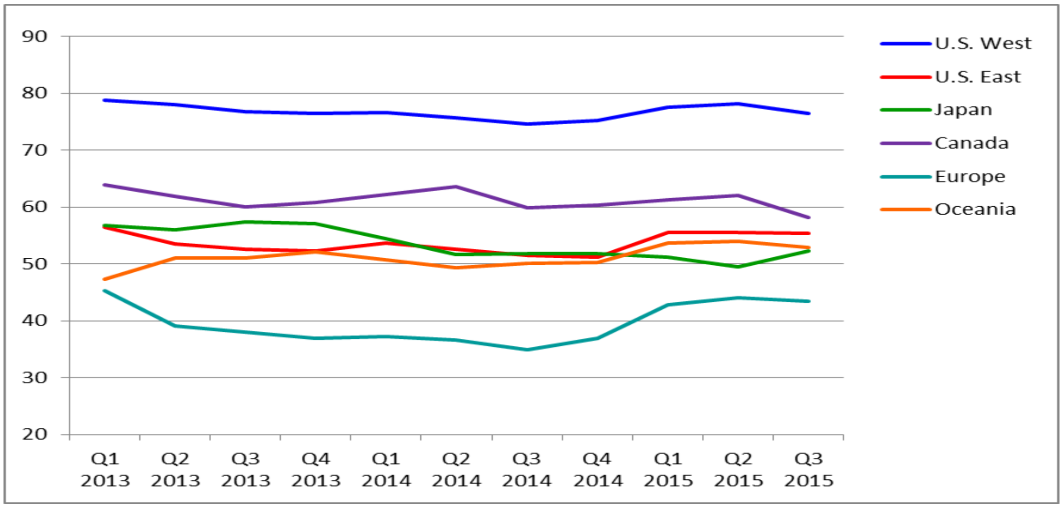
	2013				2014				2015P		
MMA	*Q1 2013*	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
U.S. West	79	77	74	78	78	72	74	79	79	76	75
U.S. East	56	50	51	55	55	48	52	54	61	52	53
Japan	57	55	60	56	47	52	57	47	50	52	55
Canada	64	60	56	66	64	61	55	66	63	57	54
Europe	45	33	36	42	34	34	37	40	52	41	38
Oceania	47	55	51	50	51	47	53	51	57	54	48

P=Preliminary

Three out of four U.S. West respondents, about half of U.S. East, Japanese, Canadian and Oceania respondents, and nearly 40 percent of European respondents said that they would very likely revisit Hawaiʻi in the next five years. Except for a 5 point drop in ratings by Oceania respondents, ratings by other visitor markets were similar to the third quarter of 2014.

Figure 8: Very Likely to Revisit Hawai'i in the Next Five Years

(Percentage of visitors who are "Very Likely" to revisit Hawai'i in the next five years by MMA 3-month moving average)



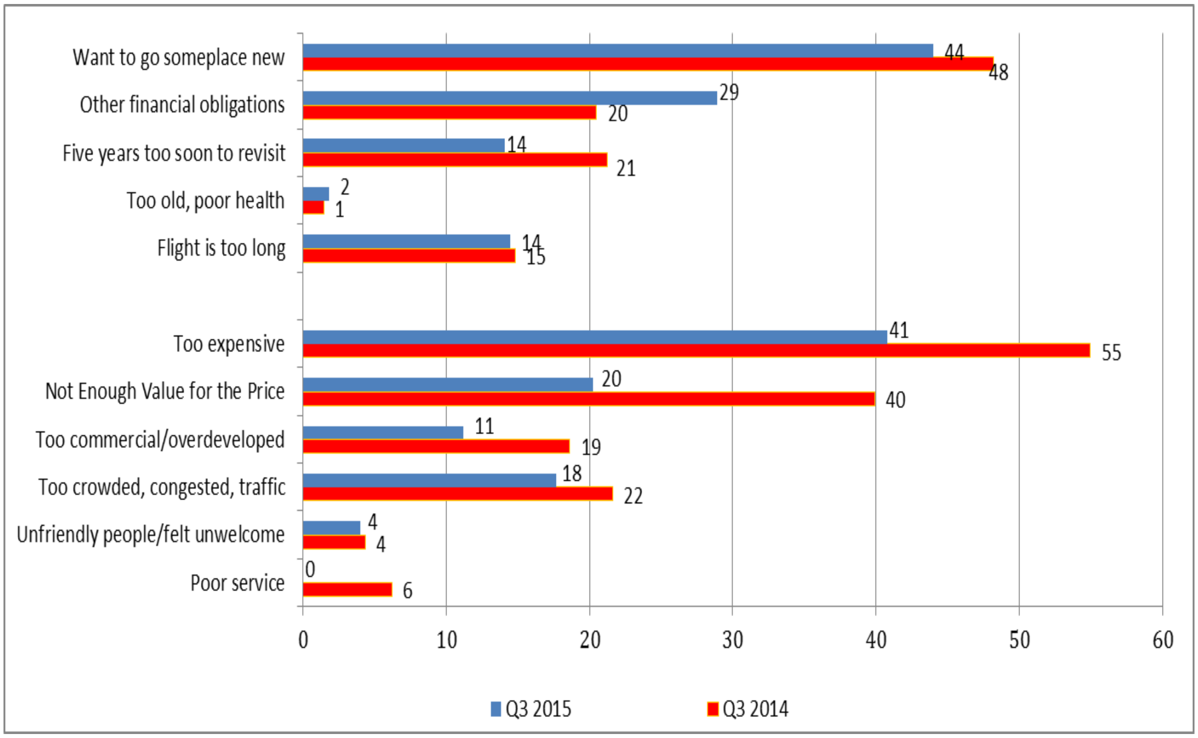
The pattern of change for the likelihood of return to Hawai'i in the next five years is shown in Figure 8. Ratings for these measures of satisfaction have a much wider range (35-79 points) than other measures of satisfaction. For U.S. West, U.S. East, Oceania and Europe, trend lines have been relatively flat since the first quarter of 2015. After slowly declining in previous quarters, the trend line for Japan increased in the third quarter of 2015.

Reasons for Not Revisiting Hawai'i in the Next Five years

Visitors who said that they would ***not likely revisit Hawai'i*** in the next five years cited many reasons for that decision. Understanding those reasons allows us to distinguish dissatisfied visitors (i.e., those who are *unwilling* to return) from those who are unable to return due to health, financial, or other constraints.

In Figures 9 through 14, visitors' reasons for not returning were separated into two groups: "barriers to returning" and "performance issues." Barriers appear at the top of each chart and performance issues are at the bottom. "Not enough value for the price" is similar to "too expensive," but is a complaint about the quality of the product rather than its price tag. 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."

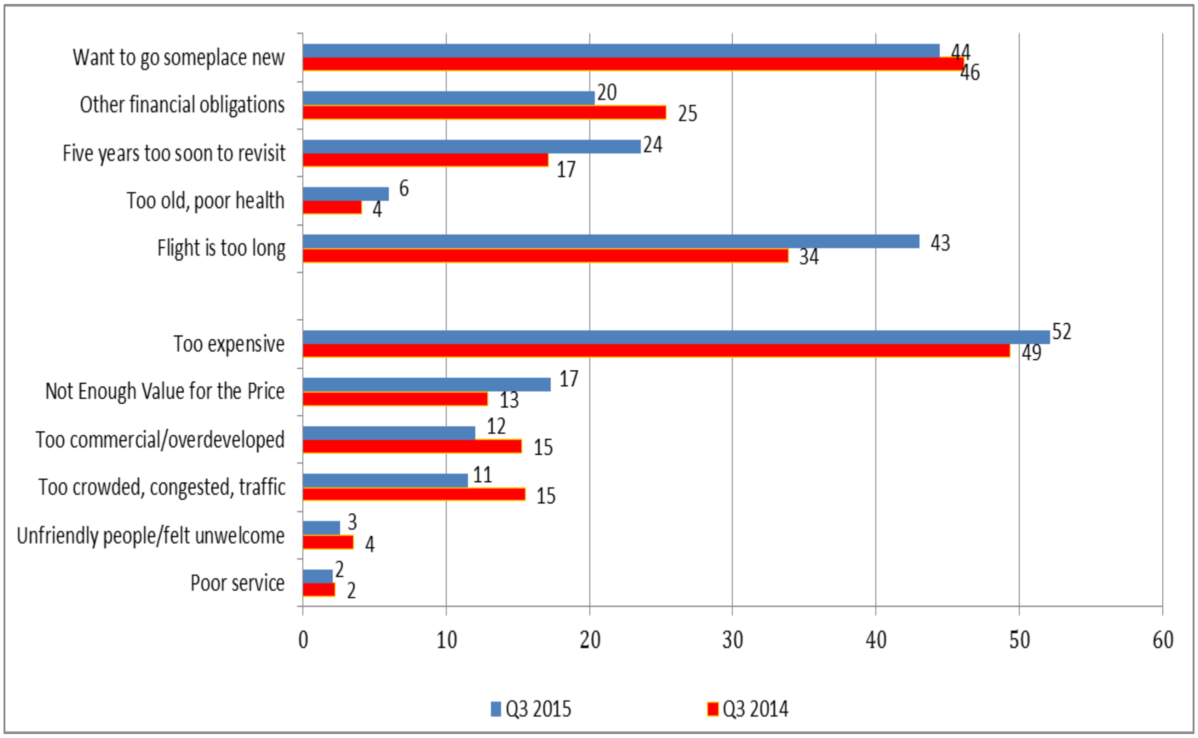
Figure 9 Reasons for Not Revisiting Hawai'i in Next Five Years – U.S. West
(Percentage of U.S. West Respondents not Likely to Revisit Hawai'i in the Next Five Years)



In the third quarter of 2015, 44 percent of U.S. West respondents who indicated they were not likely to return in the next 5 years cited the desire to go someplace new. More respondents mentioned other financial obligations (+9 points to 29%) compared to the third quarter of 2014, but fewer respondents said that five years is too soon to revisit (-7 points to 14%).

In terms of performance issues, a much lower percentage of U.S. West respondents said that they will not be returning because Hawai'i is too expensive (-14 points to 41%) or that there is not enough value for the price (-20 points to 20%) compared to a year ago.

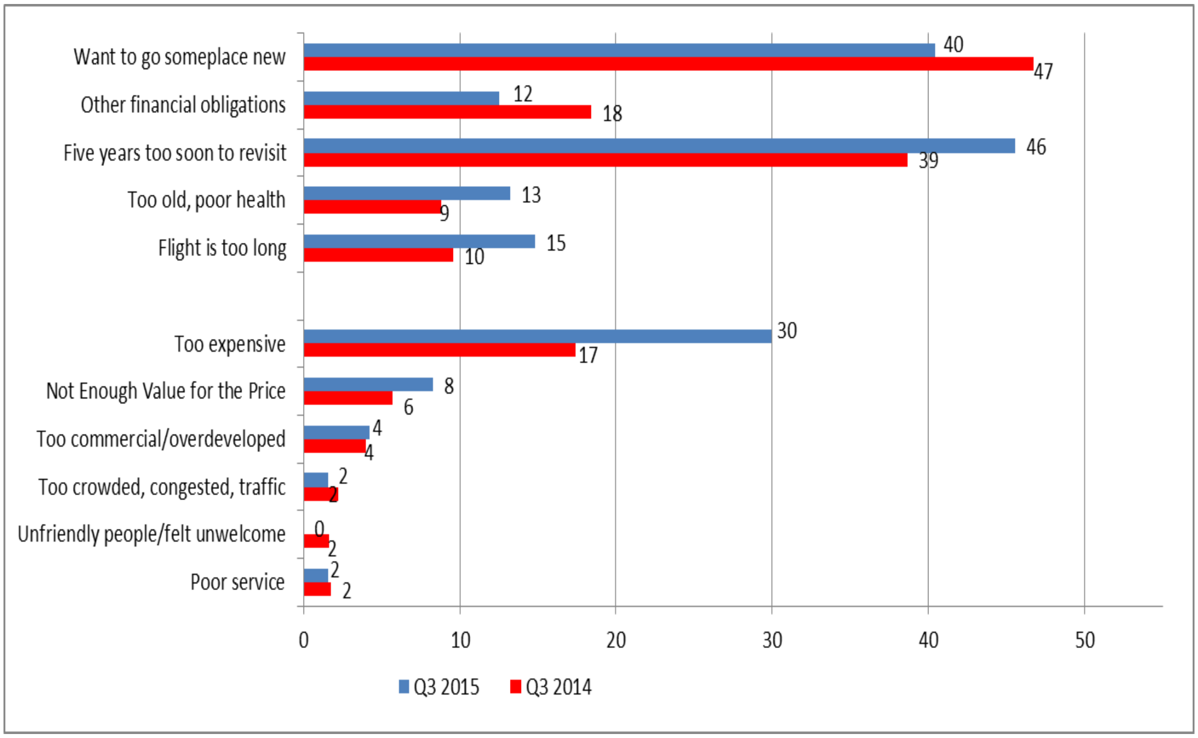
Figure 10: Reasons for Not Revisiting Hawai'i in Next Five Years – U.S. East
(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)



For U.S. East respondents, the most frequently cited barrier to returning was the desire to go someplace new (44%). More respondents said that the flight is too long (+9 points to 43%) and that five years is too soon to revisit (+7 points to 24%) but fewer mentioned other financial obligations (-5 to 25%) compared to the third quarter of 2014.

Half of U.S. East respondents who will not revisit said that Hawai'i is too expensive (52%) and 17 percent said that there is not enough value for the price.

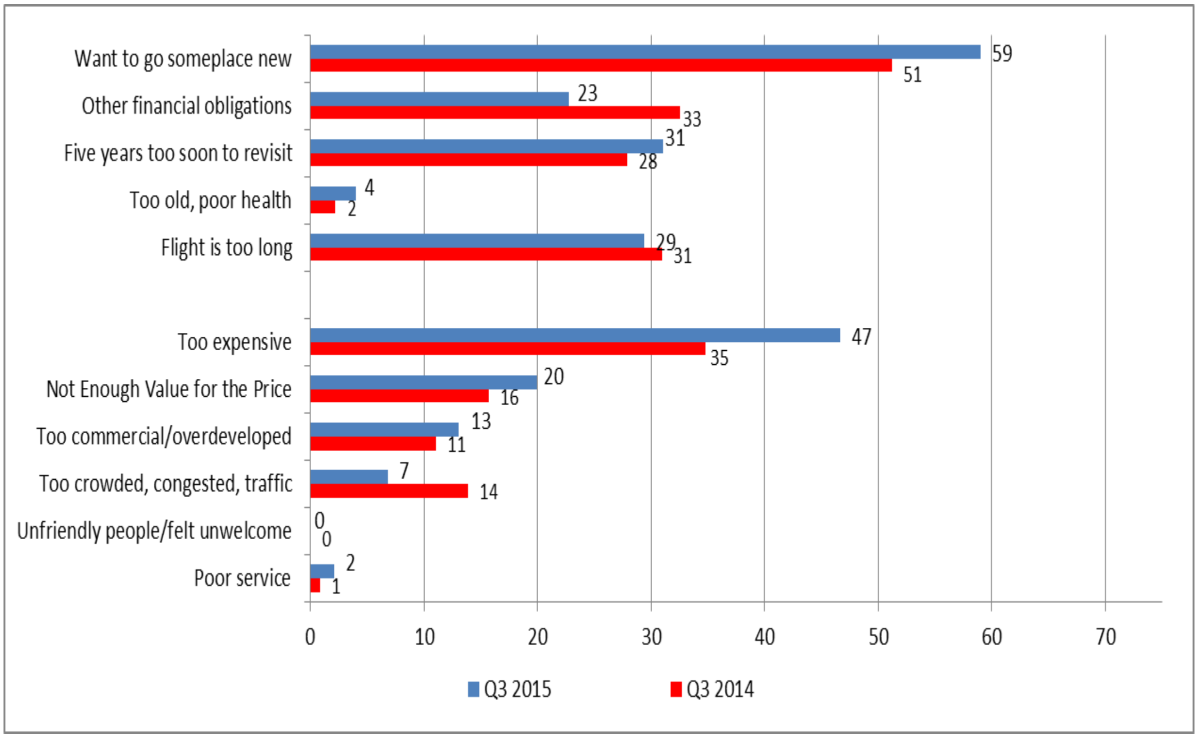
Figure 11: Reasons for Not Revisiting Hawai'i in Next Five Years – Japan
(Percentage of Japanese Respondents not Likely to Revisit Hawai'i in the Next Five Years)



Japanese respondents in the third quarter of 2015 continued to cite more barriers than performance-related issues as reasons for not returning. Close to half of the respondents said that five years is too soon to revisit (46%), up from 39 percent in the third quarter of 2014. Fewer respondents said that they would rather visit some place new (-7 points to 40%) or cited other financial obligations (-6 points to 12%), but more respondents said that the flight is too long (+5 points to 15%).

A much higher percentage of Japanese respondents said that Hawai'i is too expensive to revisit (+13 points to 30%) compared to a year ago. However, only 8 percent said there was not enough value for the price they paid (+2 points).

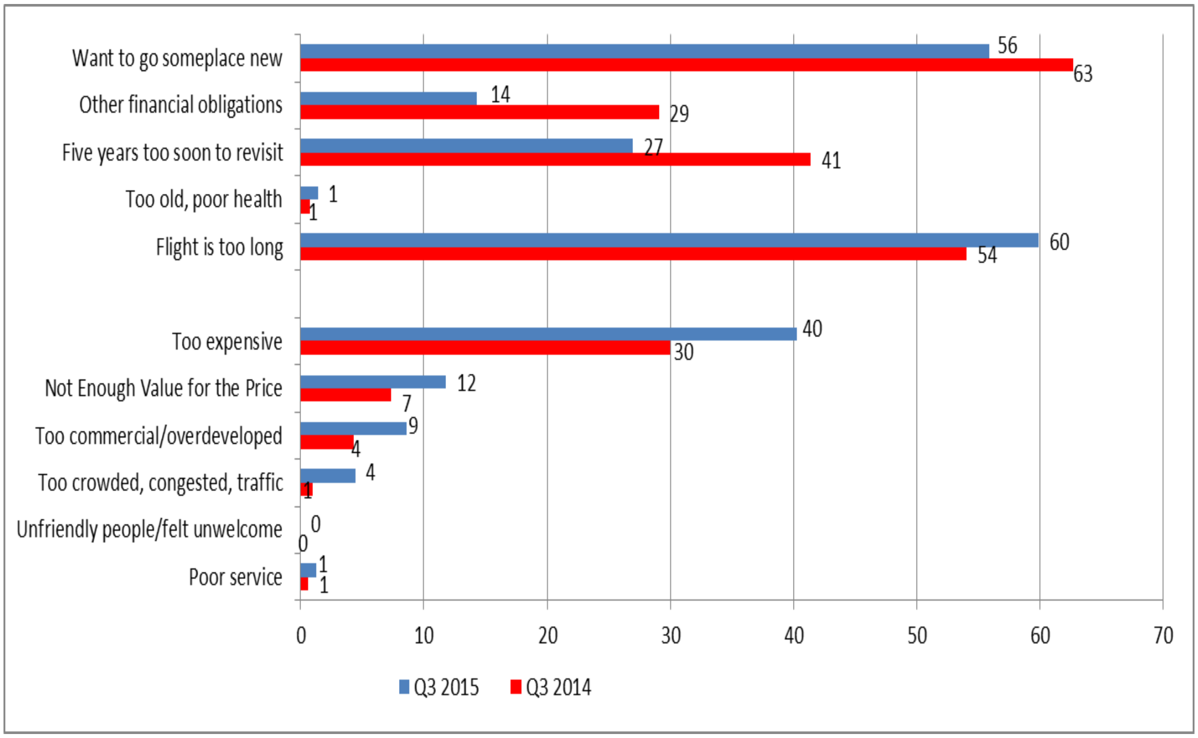
Figure 12: Reasons for Not Revisiting Hawai'i in Next Five Years – Canada
(Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)



More Canadian respondents cited the desire to visit some place new (59%) as a barrier to revisiting Hawai'i compared to the third quarter of 2014 (51%). Five years is too soon to revisit (31%) and the flight is too long (29%) were other reasons provided. Fewer respondents cited other financial obligations (-10 points to 23%) than a year ago.

The primary performance-related issue was the high cost (+12 points to 47%) while 20 percent of the respondents felt that there is not enough value for the price. Fewer Canadian visitors said that Hawai'i is too crowded/congested (-7 points to 7%) compared to last year.

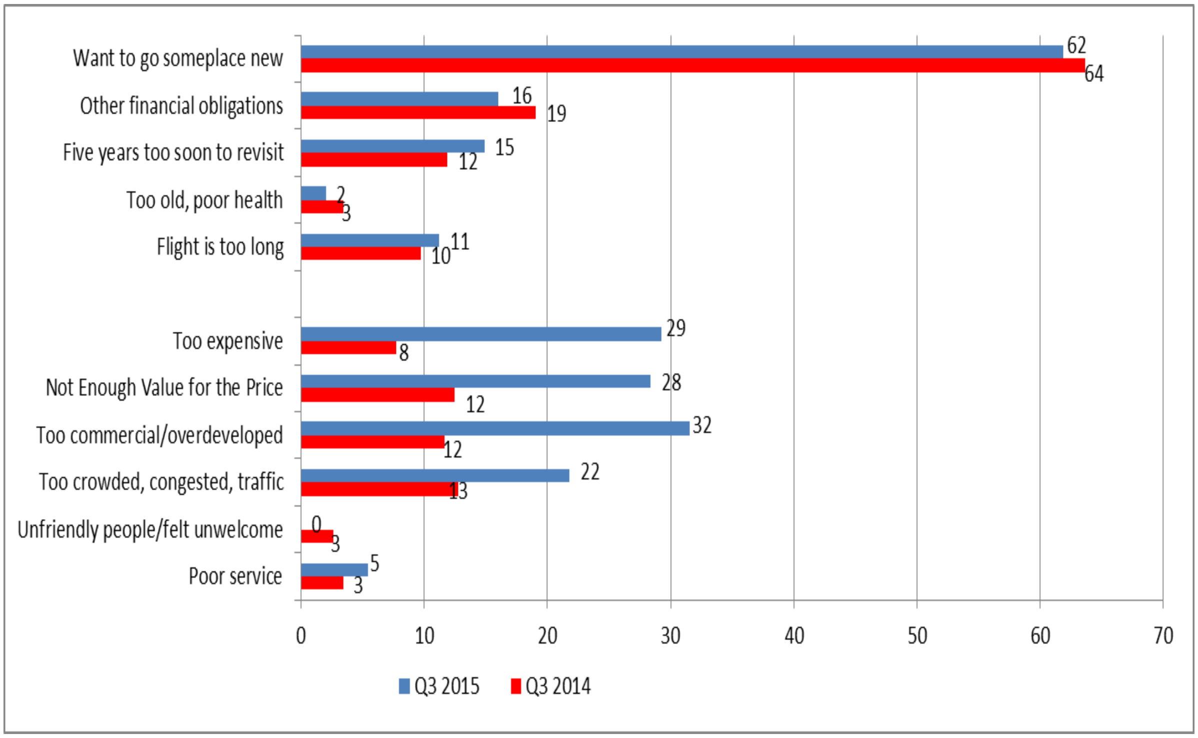
Figure 13: Reasons for Not Revisiting Hawai'i in Next Five Years – Europe
(Percentage of European Respondents not Likely to Revisit Hawai'i in the Next Five Years)



For European visitors, the primary reason for not returning to the islands continued to be the long flight (+6 points to 60%). Over half of the respondents cited the desire to go someplace new (56%), but this was down from 63 percent in the third quarter of 2014. Fewer European respondents said five years is too soon to revisit (-14 points to 27%) and cited other financial obligations (-15 points to 14%) as barriers to returning.

The high cost (+10 points to 40%) was the most mentioned performance-related reason for not returning while 12 percent (+5 points) of the respondents felt that there is not enough value for the price they paid.

Figure 14: Reasons for Not Revisiting Hawai'i in Next Five Years – Oceania
(Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)



Among Oceania respondents, the most common barrier for revisiting was the desire to go someplace new (62%). Some respondents cited other financial obligations (16%) and five years is too soon to revisit (15%).

In terms of performance issues, significantly more Oceania respondents said that they will not be returning because Hawai'i is too expensive (+21 points to 29%), there is not enough value for the price (+16 points to 28%), Hawai'i is too commercial/overdeveloped (+20% to 32%) and too crowded/congested (+9 points to 22%).

Individual Island Experience

Each island in Hawaiʻi has unique characteristics, activities, and products that attract different kinds of visitors and produce varied visitor experiences. Visitor industry planners use these island-specific satisfaction measurements to enhance the visitor products and services and to design communications programs. The VSAT survey asks Hawaiʻi visitors to rate their experience on each island they visited. Figures 15 through 24 show respondents by visitor market who rated their island experience as ***excellent*** over the last 11 quarters.

Figure 15: Island Experience Rated as Excellent – U.S.

(Percentage of U.S. Respondents by Island)

	2013				2014				2015P		
Island	*Q1 2013*	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
O'ahu	56	57	60	57	50	55	58	52	57	58	55
Maui	62	73	70	67	67	71	71	69	69	72	69
Hawai'i Island	55	56	58	51	58	61	67	60	57	60	51
Kaua'i	65	72	74	63	62	75	78	72	73	73	75

P=Preliminary

Among U.S. respondents in the third quarter of 2015, excellent ratings for Oʻahu, Maui and Kauaʻi were very similar to the third quarter of 2014 but ratings for Hawaii Island declined 16 points.

Figure 16: Island Experience Rated as Excellent – U.S.

(Percentage of U.S. Respondents by Island, 3-month moving average)

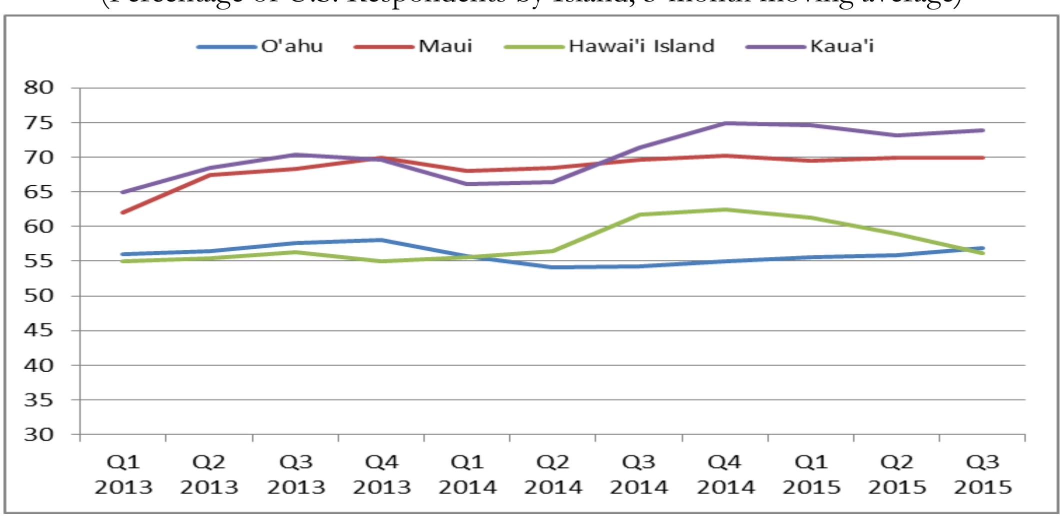


Figure 16 shows trend lines for the data in Figure 15. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which represents the calculated average of first and second quarter 2013 ratings for each MMA.

For U.S. respondents, Kaua'i and Maui consistently received higher excellent ratings than O'ahu and Hawai'i Island. Trend lines for Maui and O'ahu have remained relatively flat. Ratings for Hawai'i Island have been trending down in recent quarters and fell slightly below O'ahu's ratings in the third quarter of 2015.

Figure 17: Island Experience Rated as Excellent – Japan
(Percentage of Japanese Respondents by Island)

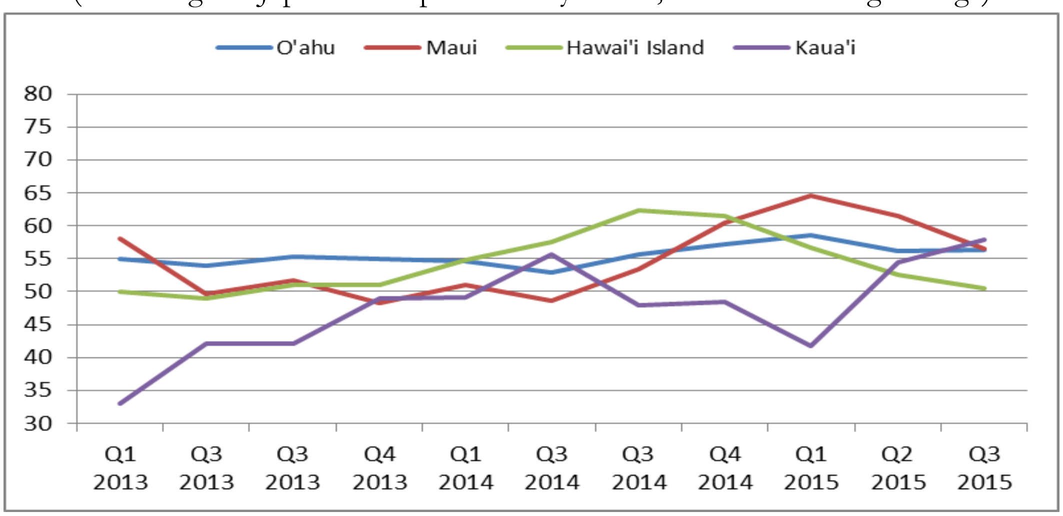
Island	2013				2014				2015P		
	Q1 2013	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
O'ahu	55	53	58	54	52	53	62	56	57	55	57
Maui	58	41	56	47	50	49	62	71	61	53	56
Hawai'i Island	50	48	55	50	59	63	64	56	49	52	50
Kaua'i*	33	51	42	54	51	62	31	53	41	69	63

P=Preliminary

* Kaua'i's ratings have been quite volatile, because fewer Japanese visitors choose to go to Kaua'i, ratings were based on smaller sample sizes.

Among Japanese visitors in the third quarter of 2015, Ratings for Hawai'i Island (-14 points), Maui (-6 points) and O'ahu (-5 points) declined from same period last year.

Figure 18: Island Experience Rated as Excellent – Japan
(Percentage of Japanese Respondents by Island, 3-month moving average)



Maui had the top ratings among the islands for Japanese respondents in first and second quarters 2015 but ratings have been declining. O'ahu's trend line has stabilized in recent quarters. Ratings for Hawai'i Island have trended down since the third quarter of 2014.

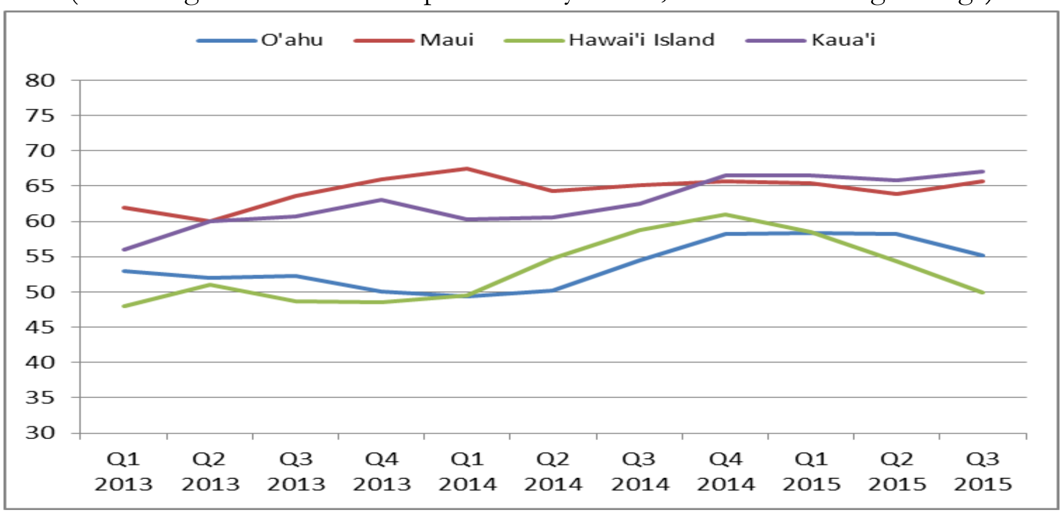
Figure 19: Island Experience Rated as Excellent – Canada
(Percentage of Canadian Respondents by Island)

Island	2013				2014				2015P		
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
O'ahu	53	51	53	46	49	55	59	60	56	58	51
Maui	62	58	71	69	63	61	72	64	60	67	70
Hawai'i Island	48	54	44	48	57	60	60	63	53	47	50
Kaua'i	56	64	62	63	56	63	69	68	63	67	72

P=Preliminary

A lower percentage of Canadian respondents in the third quarter of 2015 gave excellent ratings to Hawai'i Island (-10 points) and O'ahu (-8 points) compared to a year ago.

Figure 20: Island Experience Rated as Excellent – Canada
(Percentage of Canadian Respondents by Island, 3-month moving average)



The trend lines showed that Canadian respondents continued to give higher ratings to Kaua'i and Maui and lower ratings to Hawai'i Island and O'ahu. Trend lines for Maui and Kaua'i have been fairly flat in recent quarters. The trend line for Hawai'i Island has declined since the first quarter of 2015. O'ahu's ratings which was fairly stable between fourth quarter 2014 and second quarter 2015 declined in third quarter 2015.

Figure 21: Island Experience Rated as Excellent – Europe

(Percentage of European Respondents by Island)

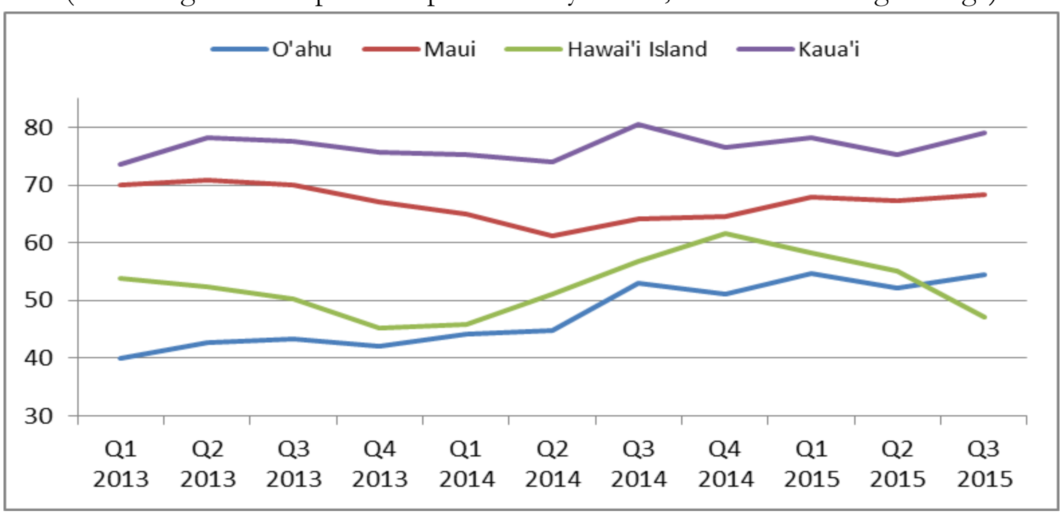
Island	2013				2014				2015P		
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
O'ahu	40	46	44	36	51	46	61	46	57	53	53
Maui	70	72	68	62	65	57	71	66	67	69	70
Hawai'i Island	54	51	46	39	53	62	55	68	52	46	44
Kaua'i	74	83	76	68	81	73	87	70	78	79	81

P=Preliminary

Excellent ratings for Hawaiʻi Island by European respondents decreased 11 points from the third quarter of 2014. Ratings for Oʻahu (-8 points) and Kauaʻi (-6 points) were also down compared to a year ago.

Figure 22: Island Experience Rated as Excellent – Europe

(Percentage of European Respondents by Island, 3-month moving average)



European respondents continued to rate Kauaʻi the highest among the islands. Kauaʻi's ratings ranged in the high 70s in recent quarters. Trend lines for Maui and Oʻahu have also stabilized in 2015. Ratings for Hawaiʻi Island, which increased in 2014, have been trending down in the last three quarters.

Figure 23: Island Experience Rated as Excellent – Oceania

(Percentage of Oceania Respondents by Island)

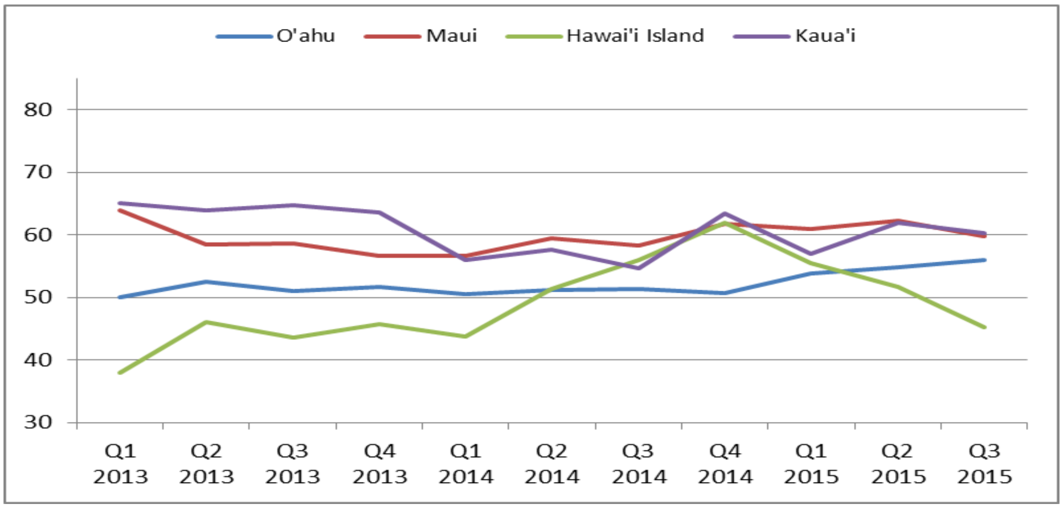
Island	2013				2014				2015P		
	Q1 2013	*Q2 2013*	*Q3 2013*	*Q4 2013*	*Q1 2014*	*Q2 2014*	*Q3 2014*	*Q4 2014*	*Q1 2015*	*Q2 2015*	*Q3 2015*
O'ahu	50	55	48	52	52	50	52	50	59	55	53
Maui	64	53	59	58	53	67	55	64	64	59	56
Hawai'i Island	38	54	39	44	48	62	58	66	42	46	47
Kaua'i	65	63	66	62	40	71	53	66	52	68	61

P=Preliminary

The percentage of excellent ratings from Oceania respondents for Kauaʻi (+8 points) were higher compared to the third quarter of 2014, but ratings for Hawaiʻi Island (-11 points) declined.

Figure 24: Island Experience Rated as Excellent – Oceania

(Percentage of Oceania Respondents by Island, 3-month moving average)



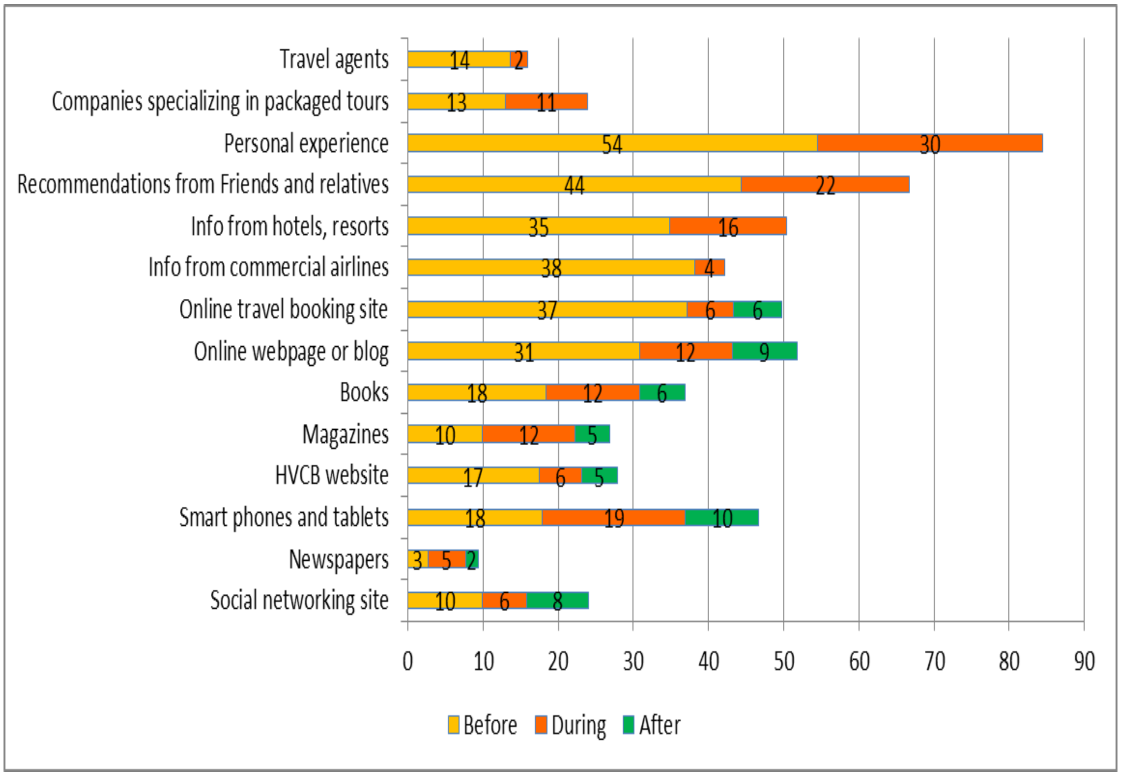
Ratings for Oʻahu have slowly trended up since the first quarter of 2015. Kauaʻi's ratings matched Maui's rating in recent quarters. Ratings for Hawaiʻi Island have been declining and were the lowest in second and third quarters of 2015.

Sources of Information used for Trip Planning

Visitors to Hawai'i used a wide variety of resources to plan their trip to the islands. This section shows the sources of information used by respondents who came in the third quarter of 2015.

Figure 25: Sources of Information about Hawai'i – U.S.

(Percentage of U.S. Respondents who used these Information)

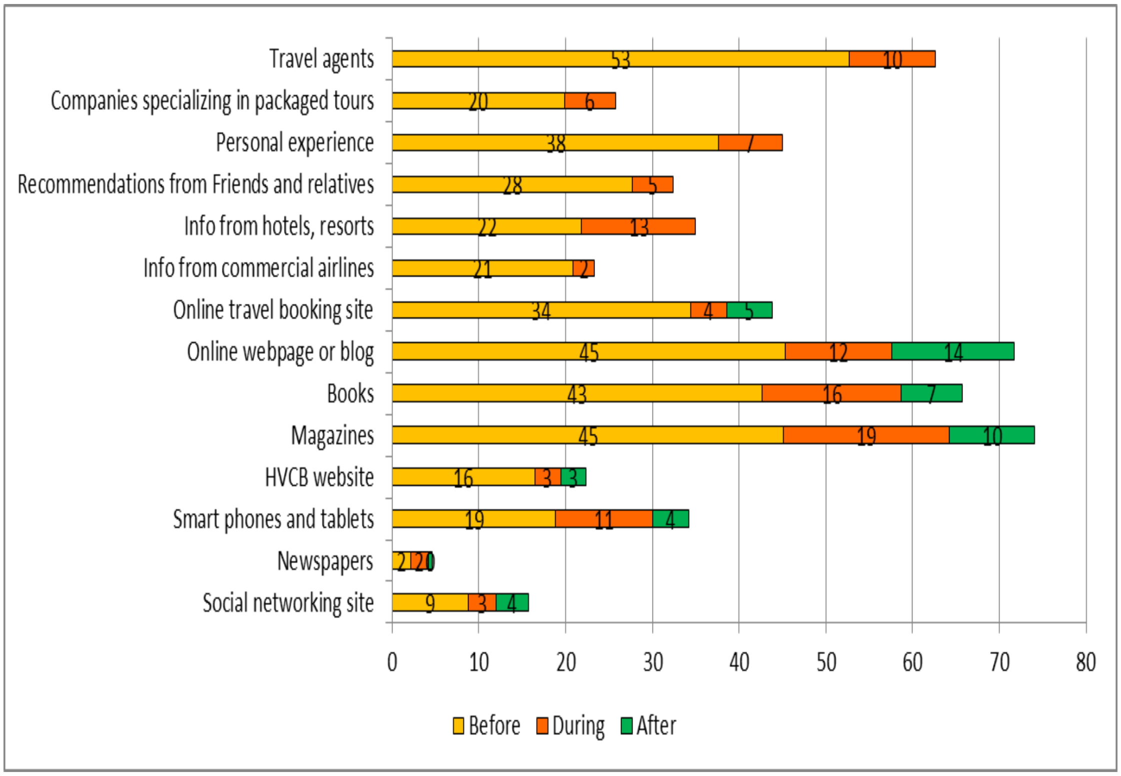


U.S. Visitors: This group of respondents relied the most on personal experience and recommendations from friends and relatives in trip planning before their arrival and during their stay in the islands. Information from airlines (38%), online travel booking sites (37%), hotels and resorts (35%), online webpage or blog (31%), smartphones and tablets (18%), guide books (18%) and HVCB website (17%) were also heavily utilized in their trip planning. Usage of travel agents was fairly moderate at 14 percent.

During their trip, many U.S. respondents used smartphones or tablets (19%), information from hotels, resorts (16%), online webpage or blog (12%), guide books (12%) and magazines (12%) to find information about Hawai'i.

Figure 26: Sources of Information about Hawai'i – Japan

(Percentage of Japanese Respondents who used these Information)



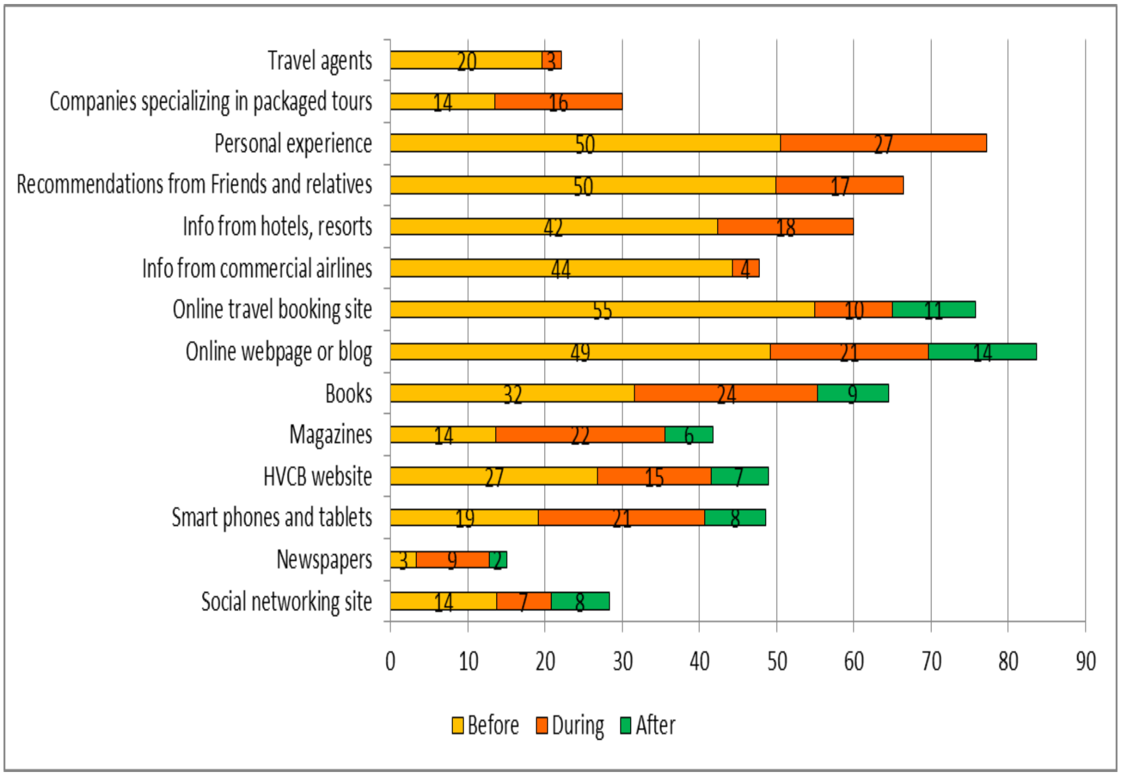
Japanese Visitors: Japanese respondents in the third quarter of 2015 relied most heavily on travel agents (53%) in planning their trip to the islands. Online webpages or blogs (45%), Magazines (45%) and guide books (43%) were also popular in their trip planning.

While their trip was in progress, Japanese respondents used magazines (19%), guide books (16%), information from hotels and resorts (13%), online webpages or blogs (12%) and smartphones and tablets (11%) to access information about Hawai'i.

Some respondents also used online webpages or blogs (14%) to seek information about Hawai'i after their trip.

Figure 27: Sources of Information about Hawai'i – Canada

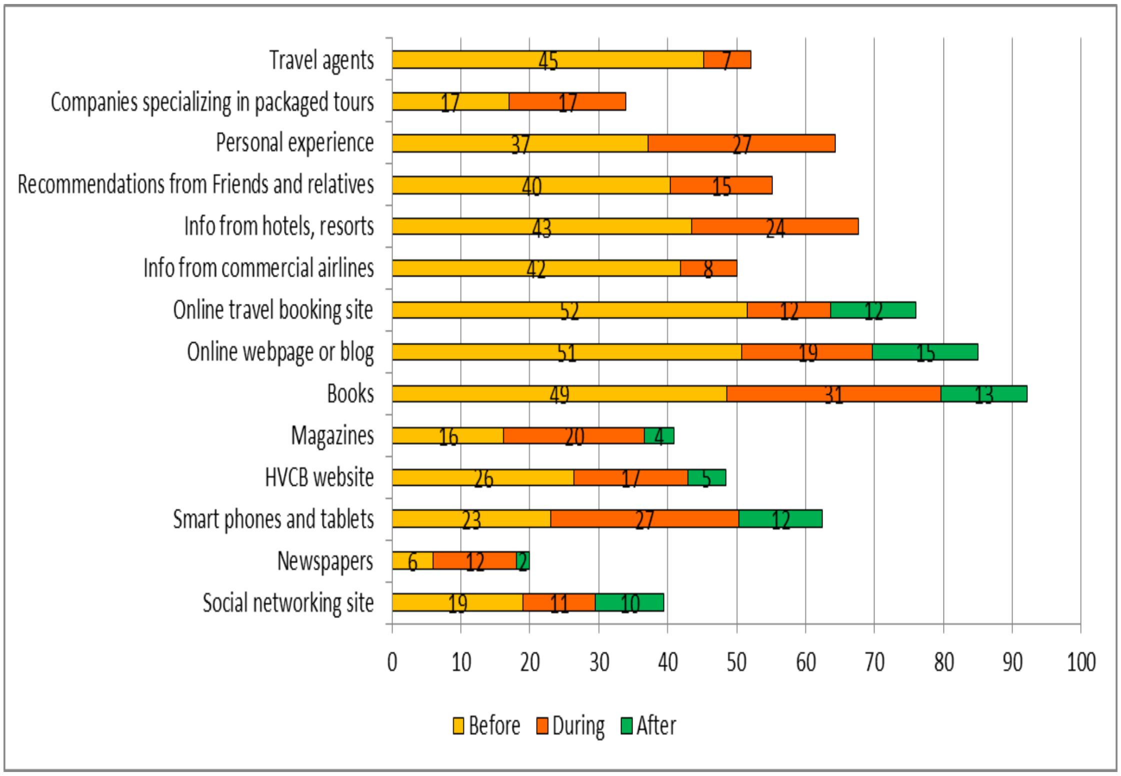
(Percentage of Canadian Respondents who used these Information)



Canadian Visitors: Before their arrival, Canadian respondents who visited in the third quarter of 2015 most frequently used online travel booking sites (55%) when planning for their trip. In addition, many Canadians relied on recommendations from friends or relatives (50%), personal experience (50%), online webpages or blogs (49%), information from airlines (44%), and information from hotels and resorts (42%). Only 20 percent used travel agents.

During their trip, many Canadian respondents relied on their personal experience (27%). Some used guide books (24%), magazines (22%), online webpages or blogs (21%), smartphones or tablets (21%), information from hotels and resorts (18%), recommendations from friends or relatives (17%) and companies specializing in packaged tours (17%) as resources. A few respondents used online webpages or blogs (14%) to find information about Hawai'i after their trip was over.

Figure 28: Sources of Information about Hawai'i – Europe
(Percentage of European Respondents who used these Information)

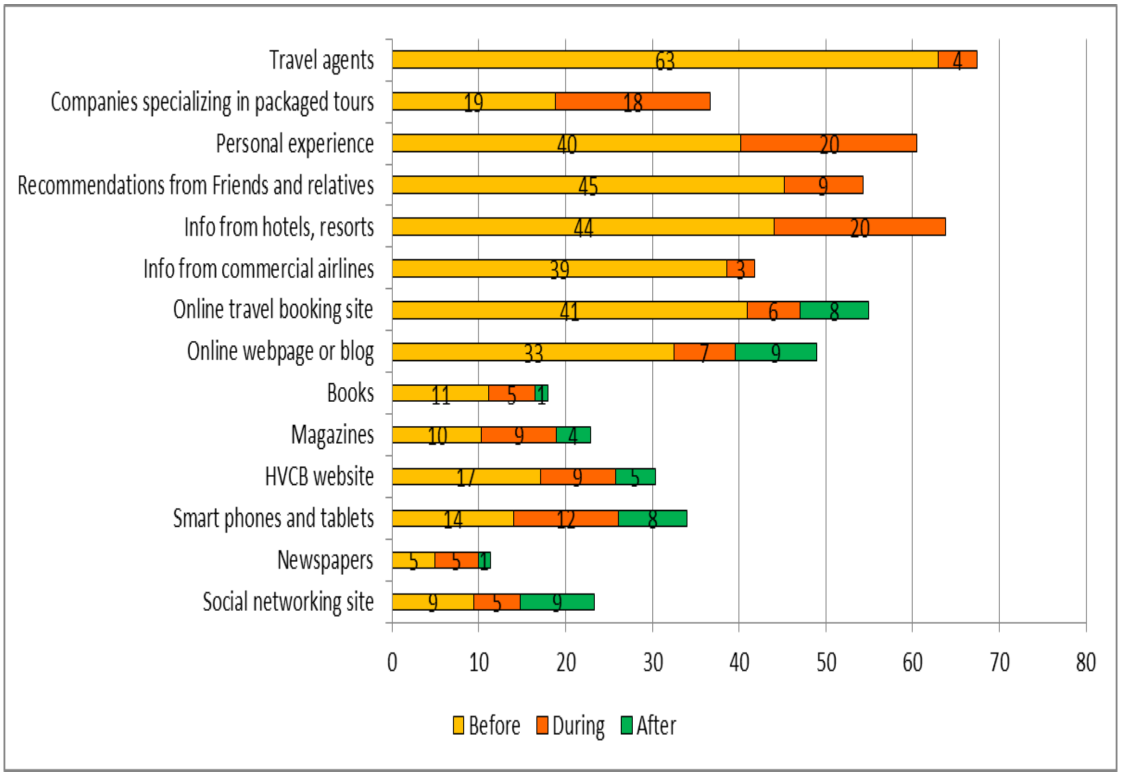


European Visitors: Among European respondents who came in the third quarter of 2015, online travel booking site (52%), online webpage or blog about Hawai'i (51%) and guide books (49%) were the most frequently used sources for trip planning. Four out of ten respondents used travel agent (45%), information from hotels and resort (43%), information from airlines (42%) and recommendations from friends and relatives (40%).

Many European respondents used guide books (31%), smart phones and tablets (27%), information from hotels and resort (24%) and relied on their personal experience (27%) during their trip.

A few respondents also used online webpages or blogs (15%), guide books (13%), online travel booking site (12%) and smart phones and tablets (12%) to seek information about Hawai'i after their trip.

Figure 29: Sources of Information about Hawaiʻi – Oceania
(Percentage of Oceania Respondents who used these Information)



Oceania Visitors: Respondents from Oceania used travel agents (63%) as their main source for trip planning before arriving to Hawaiʻi. Recommendations from family and friends (45%), information from hotels and resorts (44%), online travel booking sites (41%), personal experience (40%), information from airlines (39%) and online webpages or blogs (33%) and were also important planning tools.

During their trip, many visitors from Oceania relied on personal experience (20%), used information from hotels or resorts (20%), package tour companies (18%) and smart phones and tablets (12%) as resources about Hawaiʻi.

SURVEY METHODS

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

Quarterly data are reported for visitors from six Major Market Areas (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, Canada, Europe and Oceania. Survey forms in English are mailed to visitors from the U.S., Canada, Oceania and Europe, while visitors from Japan are mailed a Japanese language survey form. A total of 4,756 completed forms were received in the third quarter of 2015 with a margin of error of ±1.42 percentage points at the 95 percent confidence level.

Table 10: Number of Surveys Collected
July – September 2015

MMA	Completed	Margin of Error
U.S West	872	3.32
U.S East	945	3.19
Canada	769	3.53
Japan	995	3.11
Europe	502	4.37
Oceania	673	3.78
All MMAs	4,756	1.42

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. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. 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.

Data from all MMAs were reported as weighted data based on weights generated for 2014 data. The 2014 VSAT weighting system was developed to adjust for disproportionate sampling across MMAs.

For information, call the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email us at research@Hawaiitourismauthority.org