

VISITOR COVID-19 STUDY

October 2021

Prepared for:
Hawai'i Tourism Authority

[ANTHOLOGY®]

AnthologyGroup.com

RESEARCH METHODOLOGY

- Online survey conducted October 14, 2021 – October 20, 2021, among visitors to Hawai'i from U.S. Mainland.
 - 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.)
 - All respondents visited Hawai'i from October 1 – October 5, 2021.

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	263	6.04%	15.17%
U.S. East	262	6.05%	15.99%
TOTAL	525	4.28%	15.56%

*Margins of error are presented at the 95 percent level of confidence

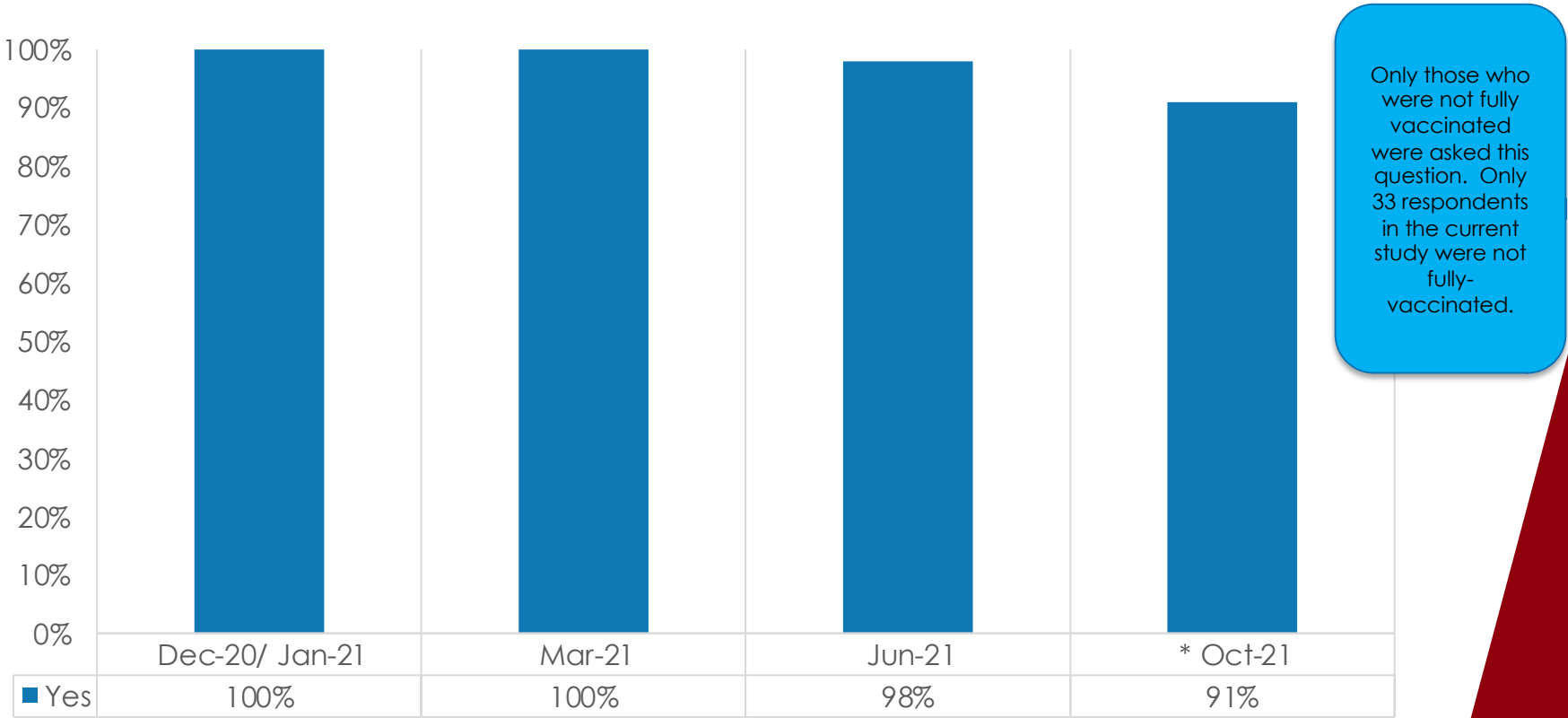
PRE-ARRIVAL TESTING PROTOCOLS

3

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[A]

PRE-ARRIVAL UNDERSTANDING OF TESTING PROTOCOLS

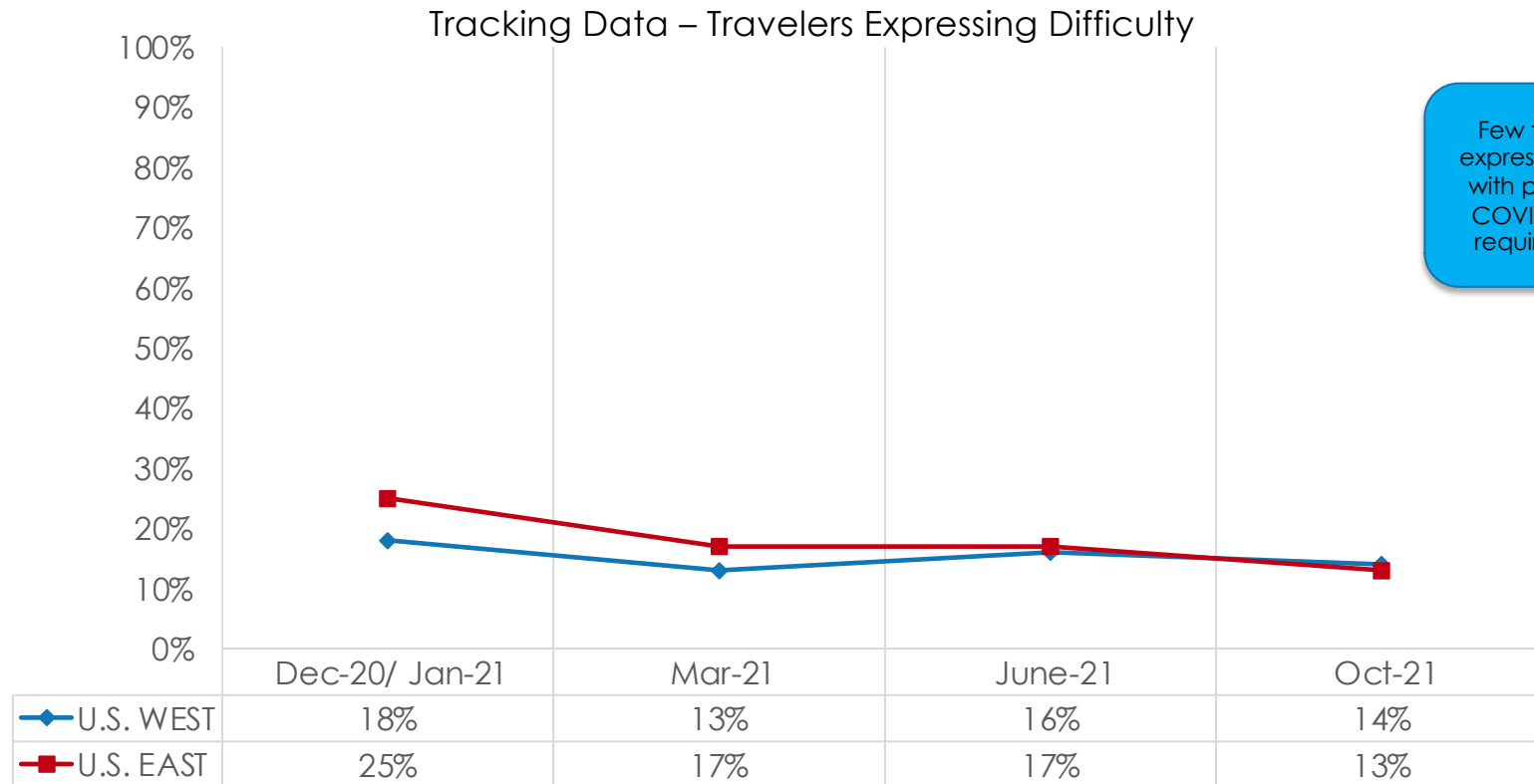


4

Q. Before you left your home state to come to Hawai'i, did you understand that pre-testing protocols were in place and required?



PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES BY MMA



Few travelers express difficulty with pre-arrival COVID testing requirements.

5 Q. Did the pre-travel COVID-19 test requirements go smoothly for you?

[A]

PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES

TOP RESPONSES GIVEN

	Dec-20/ Jan-21	Mar-21	Jun-21	Oct-21
BASE	103	76	82	71
Problems with Hawai'i Safe Travels website	9%	17%	29%	52%
Airport COVID screening	-	-	-	15%
72-hour window for test results unreasonable	46%	51%	12%	11%
Difficult to find/ access trusted partners	37%	28%	10%	11%
High cost of testing	8%	24%	23%	6%
Issues with trusted partner	18%	5%	21%	3%
No tests available for already vaccinated travelers	-	-	12%	3%
Test results did not arrive in time	15%	18%	9%	3%
Confusion re: type of test required	-	-	20%	1%

The proportion of visitors in this subset of the sample having issues with the Hawai'i Safe Travels website has reached a new high.

6 Q. What problems did you encounter?

[A]

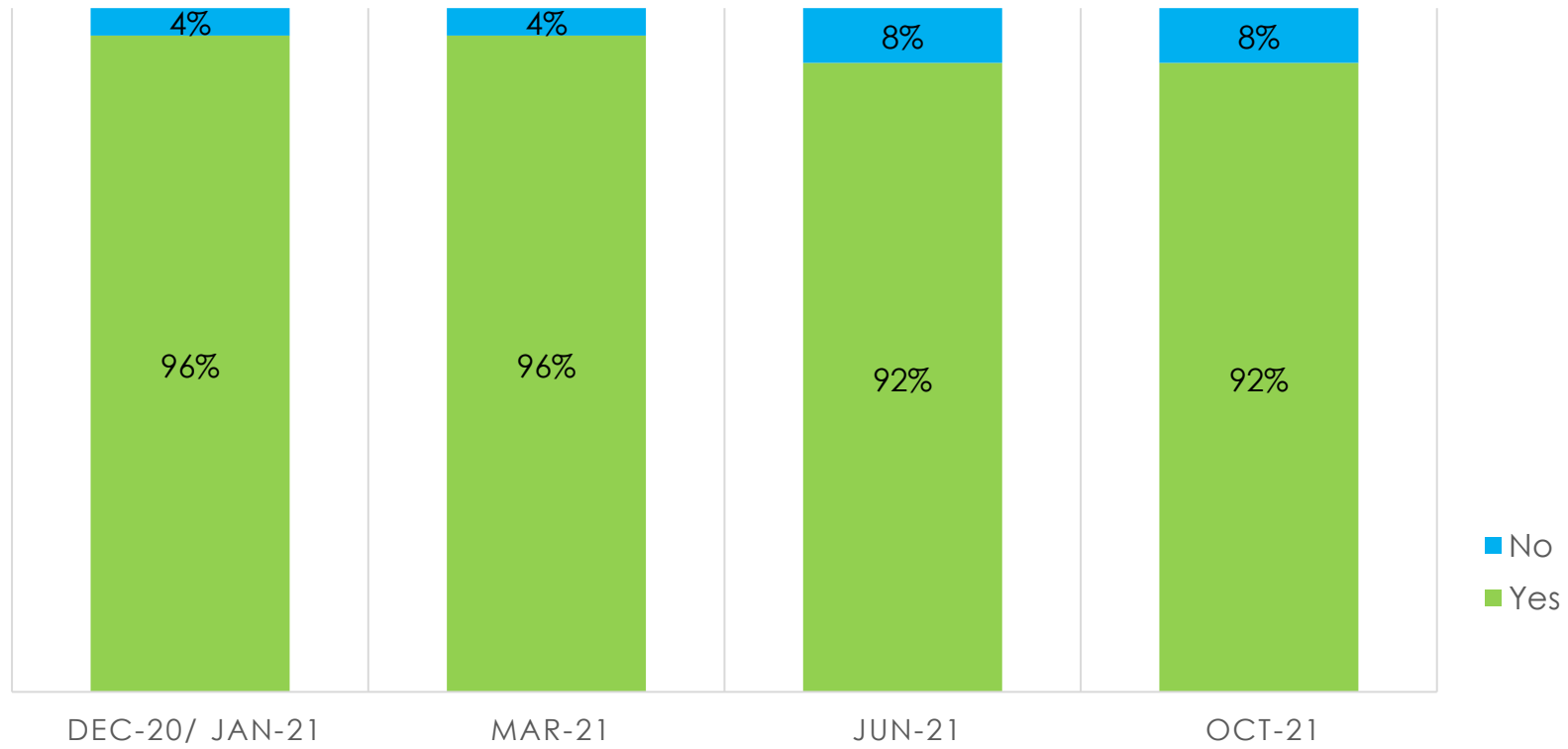
PRE-ARRIVAL EXPECTATIONS/ FAMILIARITY WITH COVID PROTOCOLS

7



[A]

AWARE OF MORE LIMITED TOURISM ACTIVITIES



8 Q. Were you aware, before arriving in Hawai'i, that some businesses such as restaurants, bars, gyms, as well as some visitor attractions, shopping centers, and retail stores, were closed or were required to operate at less than full capacity?



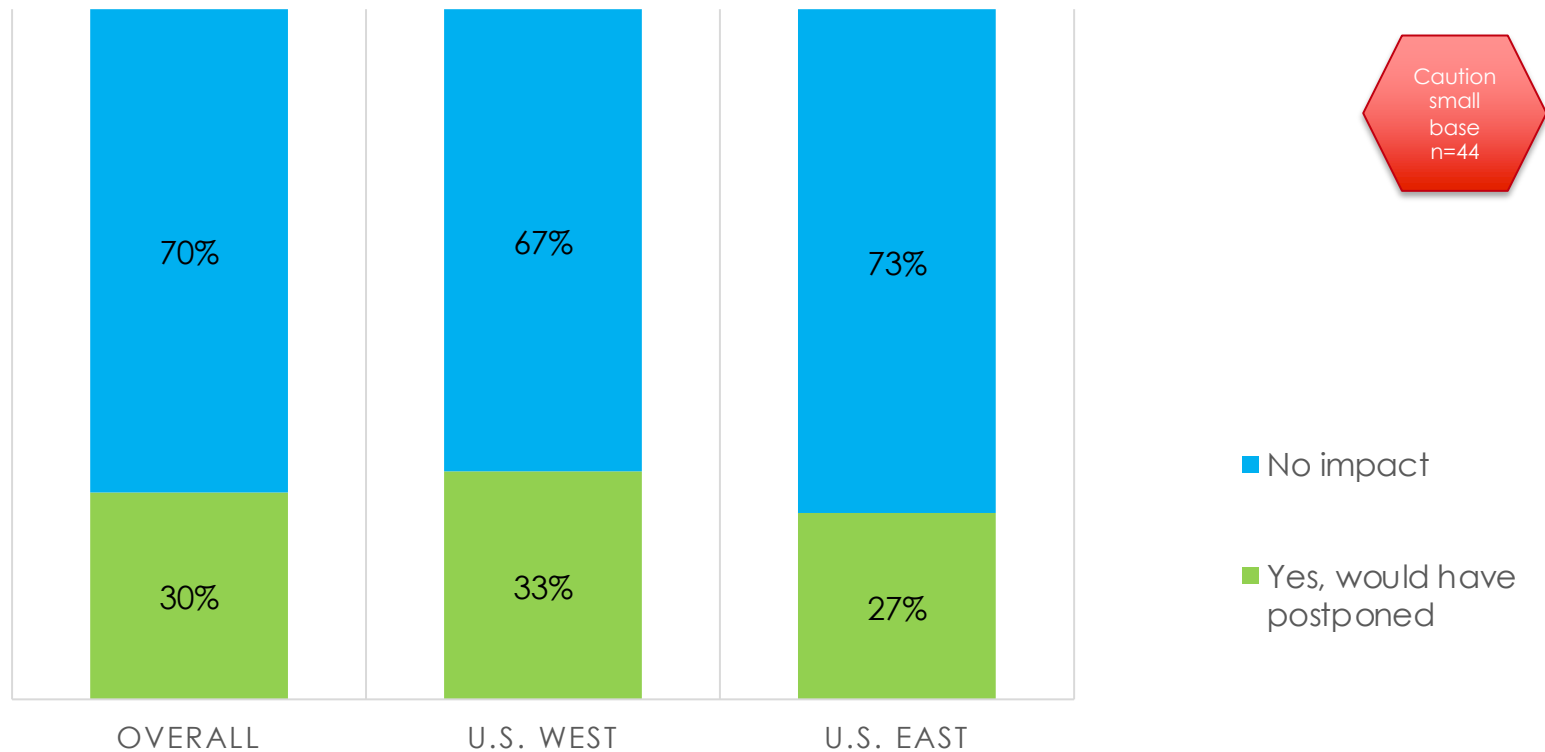
AWARE OF LOCAL GOVERNMENT MANDATES



9 Q. Were you aware, before arriving in Hawai'i, that government mandates were in place such as wearing of masks in some instances, keeping social distances, avoiding congregating in large groups, etc.?



AWARENESS OF MANDATES/ VISITOR EXPERIENCE IMPACT ON TRIP PLANNING



10 Q. (If unaware of government mandates and/or limited tourism amenities) Would you have postponed your trip had you been aware of the restrictions and capacity limitations?

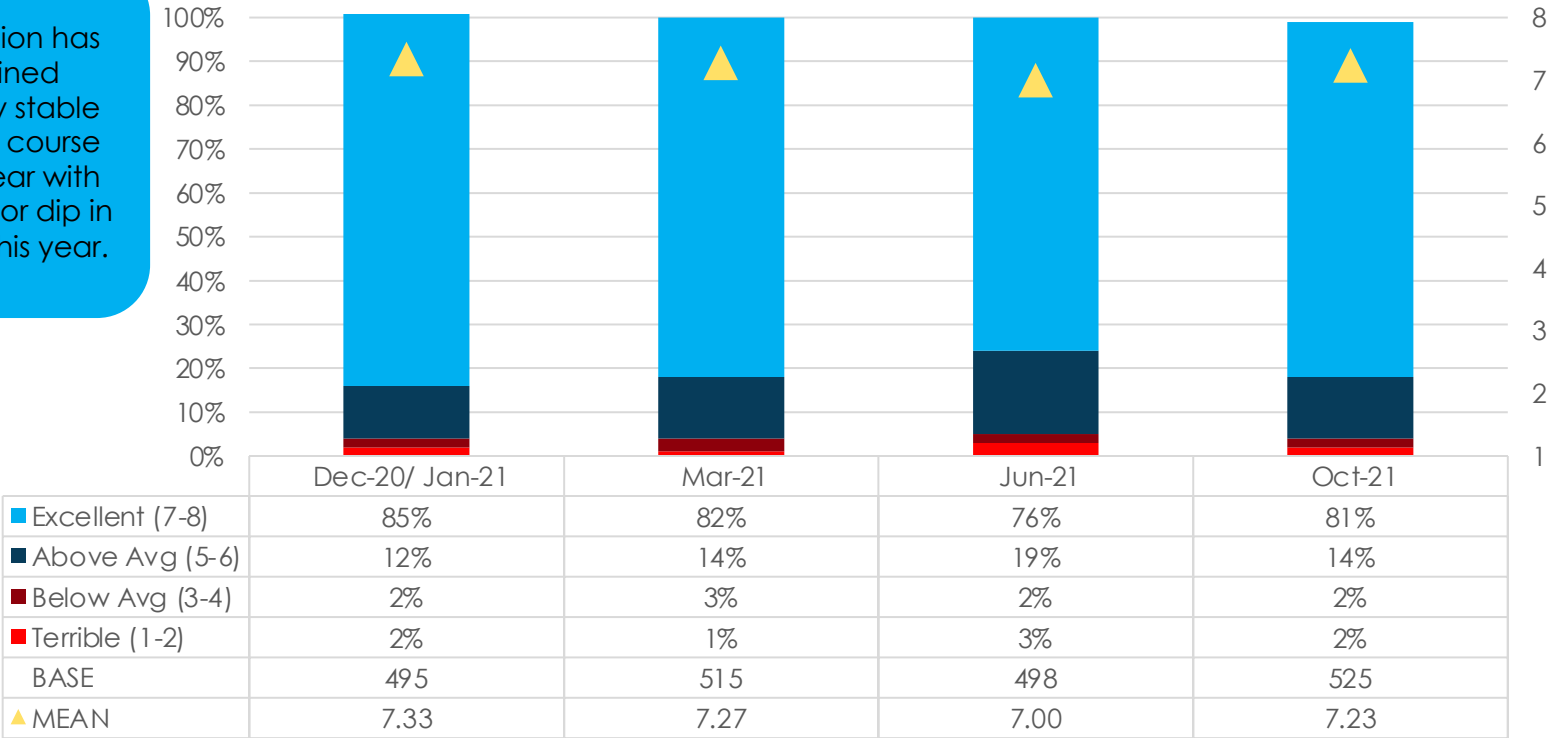
[A]

VISITOR SATISFACTION

VISITOR SATISFACTION – Tracking

8-pt Rating Scale
8=Excellent / 1=Terrible

Satisfaction has remained relatively stable over the course of the year with just a minor dip in June of this year.



12 Q. Overall, how would you rate your recent visit to Hawai'i?



AREAS OF OPPORTUNITY

TOP RESPONSES GIVEN



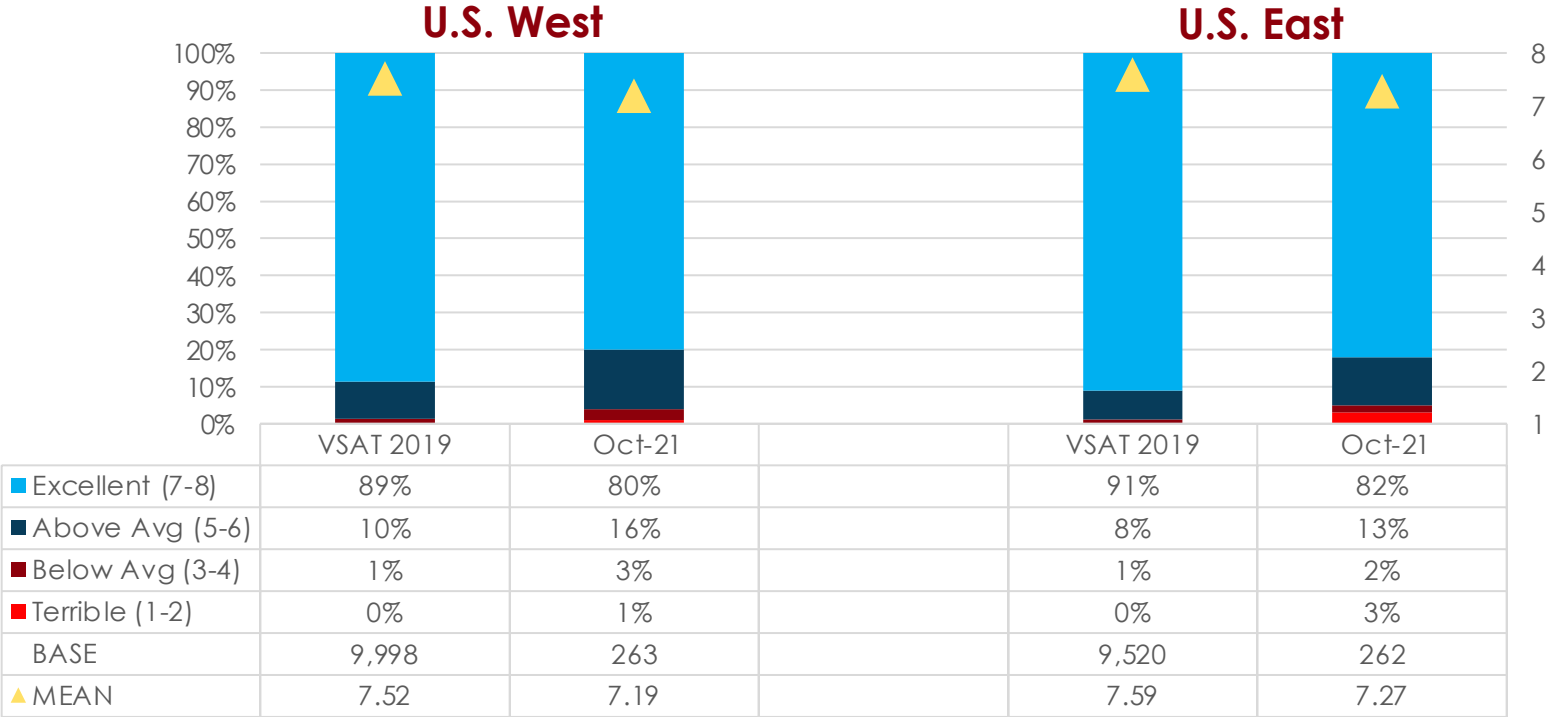
	Dec-20/ Jan-21 n=75	Mar-21 n=93	Jun-21 n=122	Oct-21 n=98
Fewer COVID restrictions	-	23%	15%	32%
Enforcing COVID rules	4%	6%	1%	12%
Had to wear a mask	3%	1%	5%	10%
Limited Capacity/ Availability – restaurants/ attractions	-	-	30%	9%
Expensive	-	-	6%	8%
Safety – homeless/ drugs/ crime	4%	4%	3%	6%
Stress of COVID testing	-	-	7%	6%
No COVID	7%	2%	-	5%
COVID mandates/ rules are confusing	27%	34%	17%	4%

13 Q (If rated 6 or less) What would have needed to change about this trip in order for you to rate this visit a seven or eight?



VISITOR SATISFACTION – October 2021 vs. 2019

8-pt Rating Scale
8=Excellent / 1=Terrible

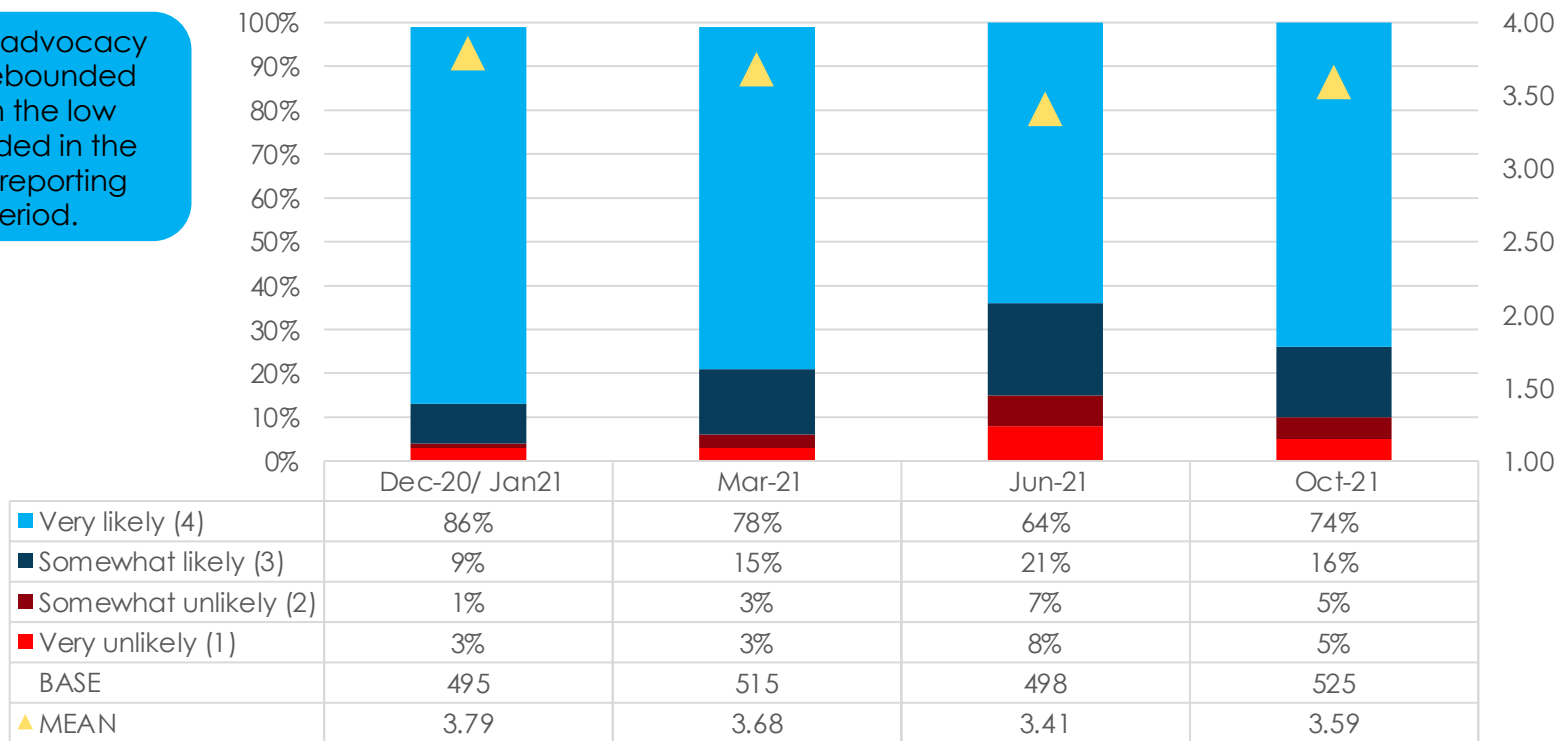


14 Q. Overall, how would you rate your recent trip to Hawai'i?



BRAND ADVOCACY – NEXT SIX MONTHS Tracking

Brand advocacy has rebounded from the low recorded in the prior reporting period.



15 Q. Overall, as you look back on this most recent trip, how likely would you be to recommend Hawai'i to a friend or family member as a place to visit in the next six months?



REASONS FOR NOT RECOMMENDING HAWAI'I

TOP RESPONSES GIVEN



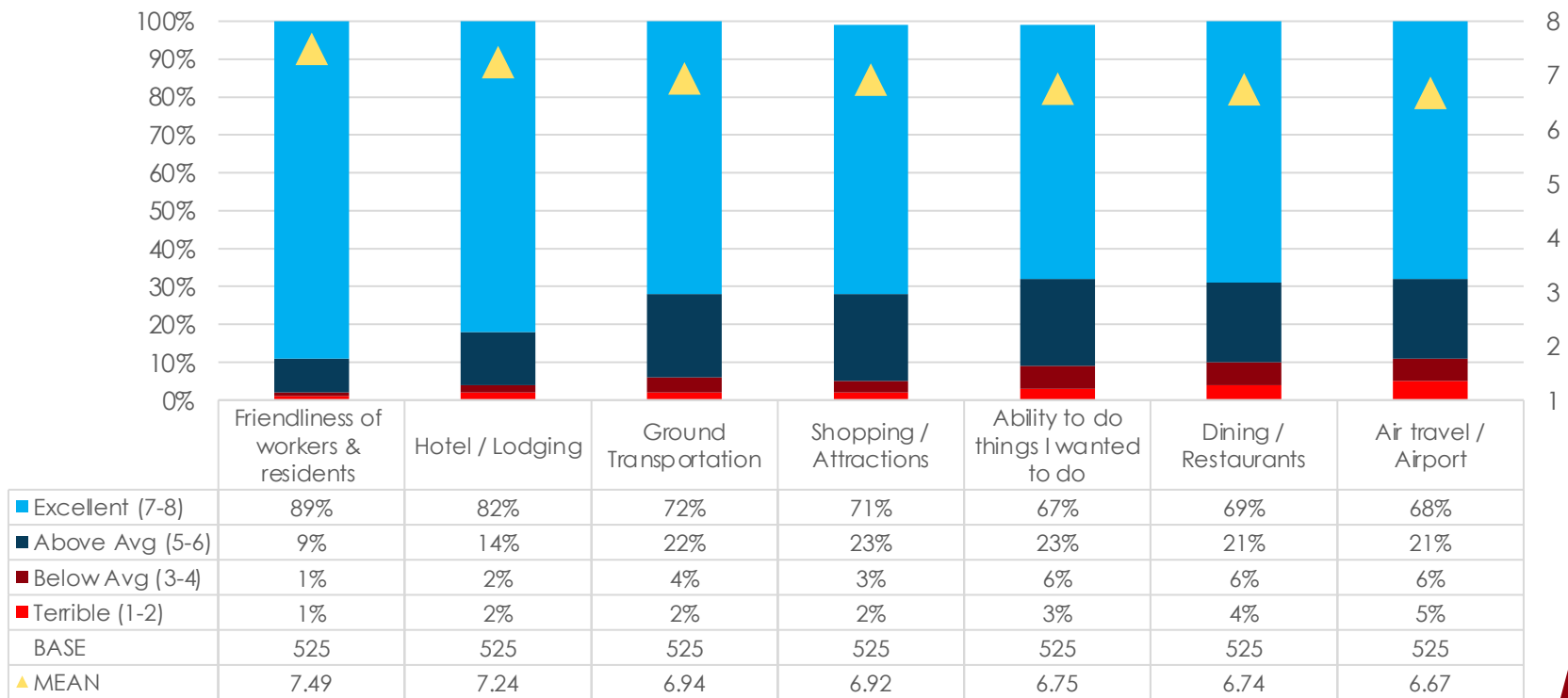
	Dec-20/Jan-21 n=21	Mar-21 n=40	Jun-21 n=75	Oct-21 n=51
Quarantine/ restrictions	10%	18%	-	31%
Too expensive	-	15%	11%	12%
Unfriendly people/ unwelcome	-	15%	4%	12%
Required vaccine card/ masks	-	-	-	12%
Wait for end of pandemic/ travel restrictions	-	-	20%	10%
Travel is too difficult/ hassle at this time	-	-	19%	10%
Closures of businesses, attractions, natural landmarks	14%	33%	13%	8%
COVID-19 testing requirements are unreasonable	57%	15%	15%	6%

16 Q (If somewhat or very unlikely) Why would you be unlikely to recommend Hawai'i to a friend or family member as a place to visit?



VISITOR SATISFACTION – Experience Components

8-pt Rating Scale
8=Excellent / 1=Terrible



17 Q. Thinking of your most recent trip, how would you rate the following aspects of your visit...?



VISITOR SATISFACTION – Experience Components

8-pt Rating Scale
8=Excellent / 1=Terrible

Visitor satisfaction has increased (statistically significant) in each of the measures being tested.

	Jun-21	Oct-21	Jun-21	Oct-21
	Top Box	Top Box	MEAN	MEAN
Flights to and from Hawaii (including airport experience)	57%	68% ↑	6.23	6.67 ↑
Hotel and lodging accommodations	73%	82% ↑	6.97	7.24 ↑
Transportation in Hawaii	51%	72% ↑	6.01	6.94 ↑
Shopping and attraction opportunities	61%	71% ↑	6.54	6.92 ↑
Dining/ restaurant experiences	56%	69% ↑	6.38	6.74 ↑
Ability to do the things you wanted to do while in the islands	54%	67% ↑	6.20	6.75 ↑
Hospitality and friendliness of Hawaii workers and residents	79%	89% ↑	7.13	7.49 ↑

18 Q. Thinking of your most recent trip, how would you rate the following aspects of your visit...?

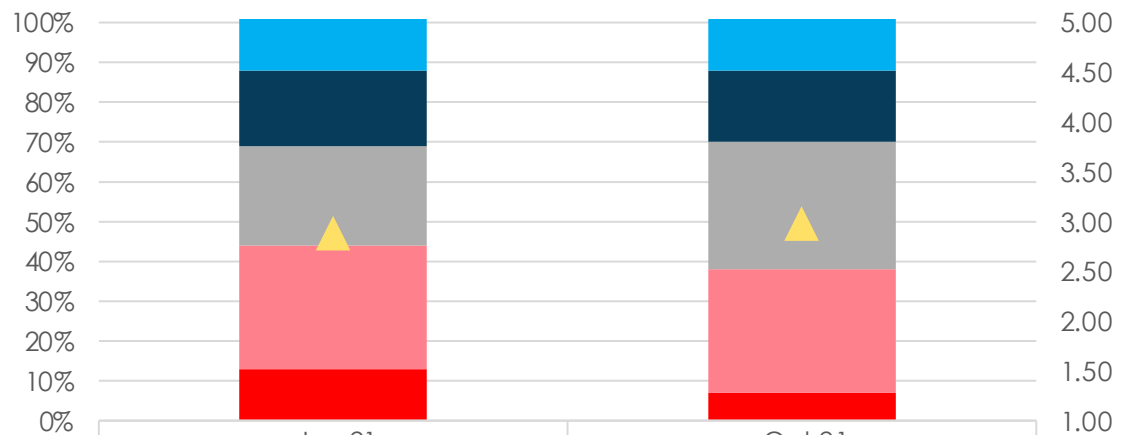


REPEAT VISITORS

REPEAT VISITOR – DIRECT COMPARISON Pre-pandemic vs. Current Travel Experience

5-pt Rating Scale

38% of repeat visitors who have traveled to the state pre-pandemic indicate their current trip was less satisfying by comparison.



	Jun-21	Oct-21
■ Pandemic trip a lot more enjoyable (5)	13%	13%
■ Somewhat more enjoyable (4)	19%	18%
■ No Difference (3)	25%	32%
■ Somewhat less (2)	31%	31%
■ Much less enjoyable (1)	13%	7%
BASE	275	261
▲ MEAN	2.88	2.98

20

Q. How did your last pre-pandemic trip to Hawai'i (February 2020 or earlier) compare overall to this most recent visit to the state?

[A]

PANDEMIC TRAVEL TO HAWAI'I LESS SATISFYING COMPARED TO PRIOR TRIP PRE-PANDEMIC

Reasons for less enjoyable experience

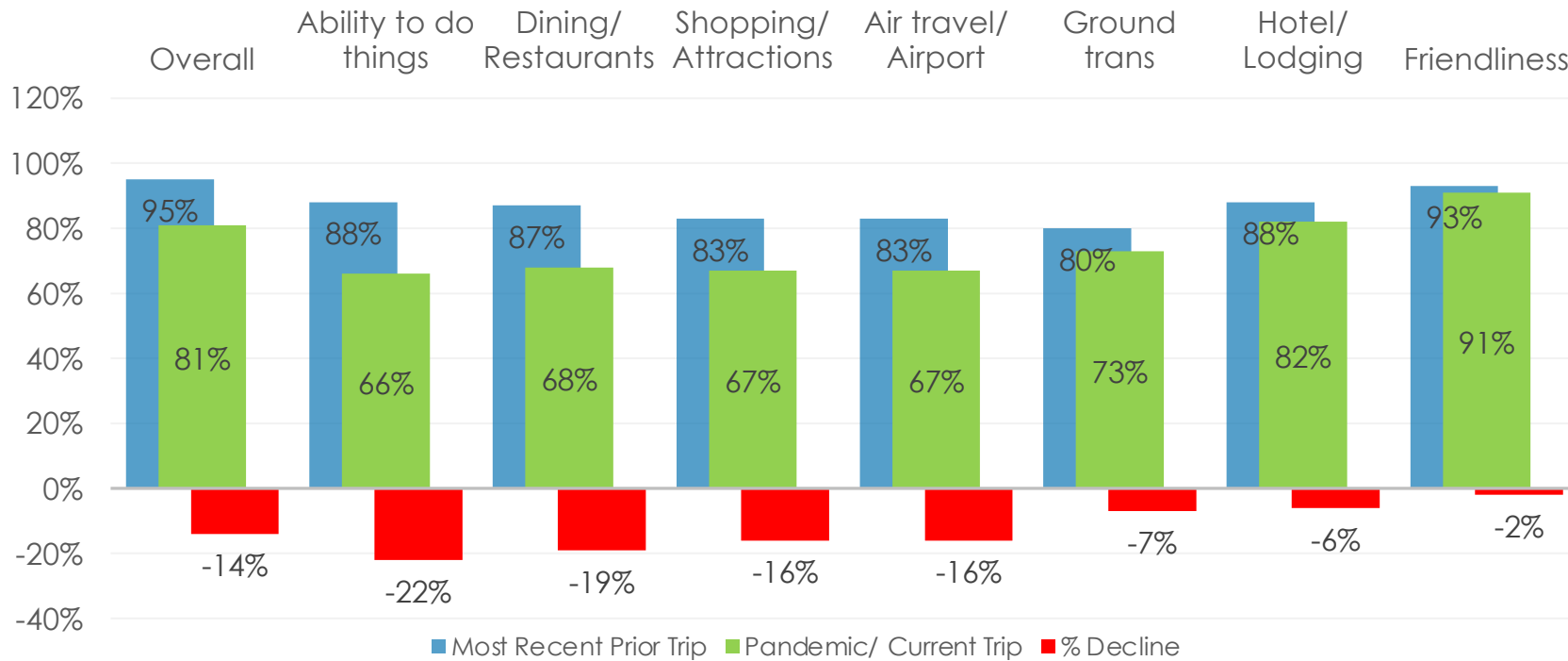


	Jun-21 n=120	Oct-21 n=98
Limited availability/ capacity – restaurants, attractions, lodging, etc.	24%	21%
This trip had too many COVID restrictions	22%	65%
Difficult to get reservations	8%	9%
Rental car availability/ cost	16%	6%
COVID rules not followed/ confusing	3%	6%
Didn't get to do everything I wanted to	10%	5%

21 Q. (If current trip less enjoyable) You said this visit was somewhat less enjoyable/ a lot less enjoyable overall than your last pre-pandemic trip... what would need to change about this most recent trip in order for you to rate it as high or higher than your earlier visit?



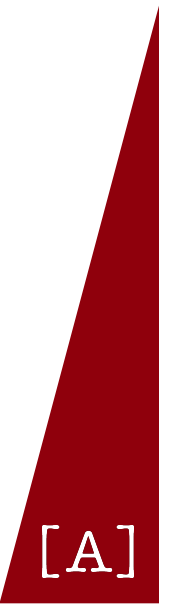
REPEAT VISITOR SATISFACTION – Experience Components Most Recent Prior Trip (Pre-pandemic) vs. Current Trip Top Box (Excellent 7-8)



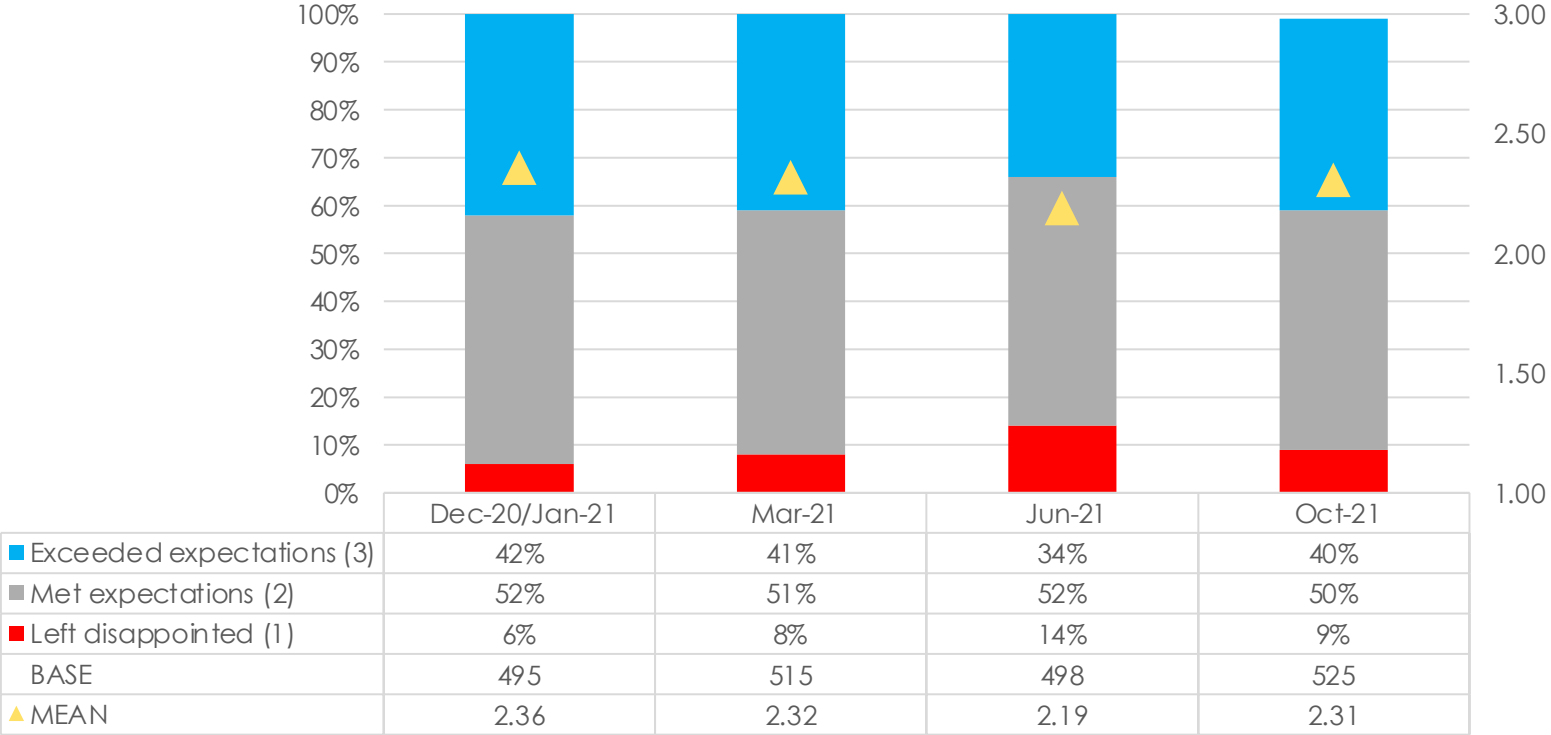
22 Thinking of your last pre-pandemic trip to Hawai'i (February 2020 or earlier), how would you rate the following aspects of each visit using a scale of one to eight, with eight being excellent and one being terrible?



EXPECTATIONS



TRIP EXPECTATIONS



Q. Thinking of this trip and your expectations before arriving, would you say this trip exceeded your expectations, met your expectations, or were you left disappointed?



TRIP EXPECTATIONS

SEGMENTATION ANALYSIS

- *Younger travelers or those under the age of 35 were the most likely to feel that their trip exceeded their expectations. This number slowly declines as visitors get older.*
- *First-time visitors were also more likely to feel their trip exceeded their expectations compared to repeat visitors.*
- *Visitors from U.S. East were more likely to feel their trip exceeded their expectations compared to those from U.S. West.*

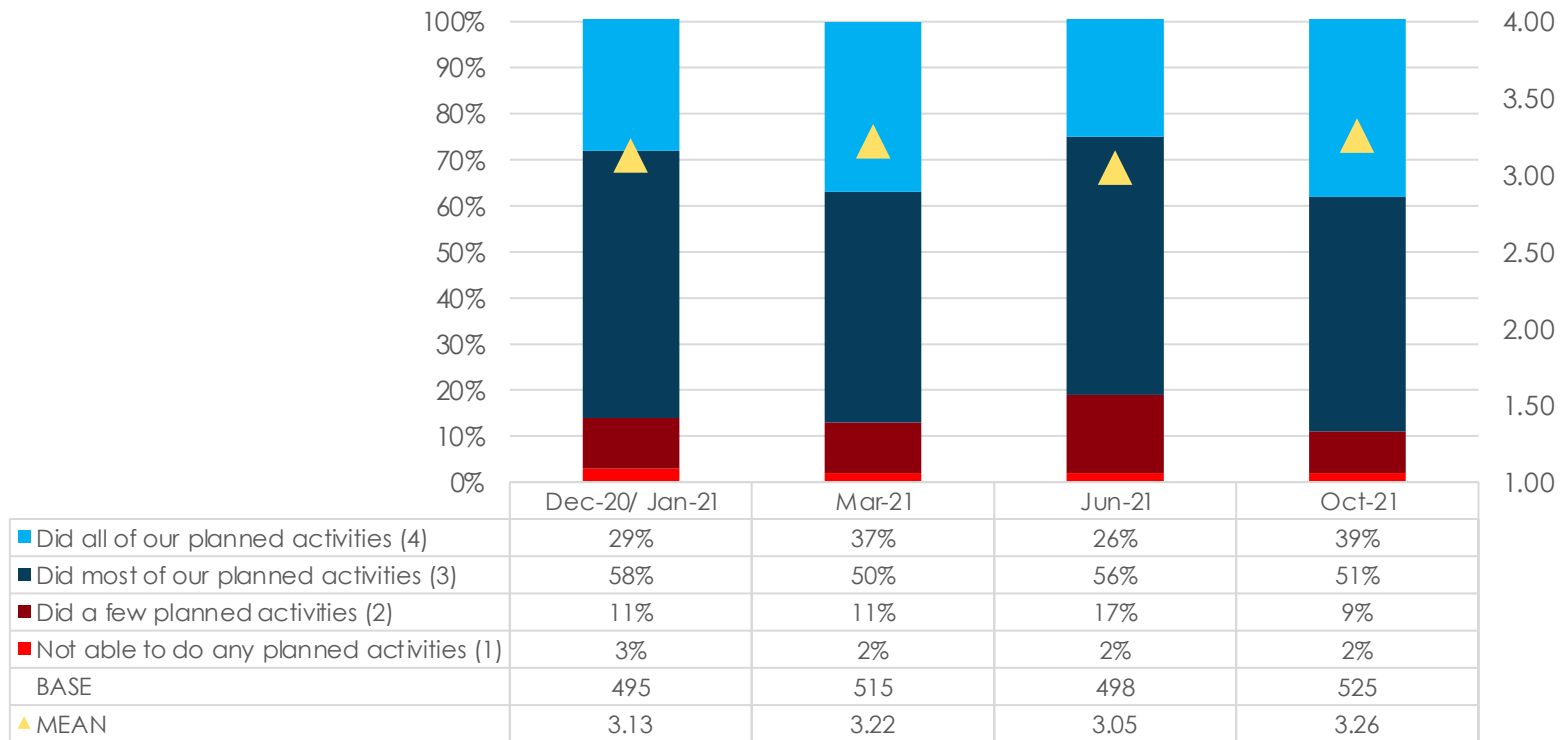
TRIP EXPECTATIONS – REASONS FOR DISAPPOINTMENT

Caution
small
base

	Dec-20/ Jan-21 n=31	Mar-21 n=43	Jun-21 n=72	Oct-21 n=48
Social distancing restrictions	10%	23%	1%	50%
COVID-19 rules not enforced	3%	7%	-	19%
Couldn't do everything I wanted to do	19%	5%	10%	13%
Quarantine/ testing	42%	14%	14%	10%
Closure of businesses/ attractions	26%	33%	14%	8%
Unfriendly local people	3%	7%	1%	6%
Difficult to get reservations – activities/ restaurants	-	-	15%	6%



PLANNED ACTIVITY / ATTRACTION PARTICIPATION



27

Q. Which of the following best describes how well you were able to do all of the things you planned and wanted to do during this trip?



OBSTACLES TO PLANNED ACTIVITY / ATTRACTION PARTICIPATION

Among those who only did “Few” or “None of things” planned

Caution
small
base

	Dec-20/ Jan-21 n=65	Mar-21 n=67	Jun-21 n=93	Oct-21 n=56
Restrictions/ Masks	-	6%	4%	25%
Closures of businesses/ attractions	51%	45%	14%	13%
Quarantine/ testing	22%	10%	12%	13%
Capacity limits	-	16%	9%	13%
Too expensive	-	-	3%	11%
Difficult to get reservations – attractions/ restaurants	-	-	52%	9%
Too crowded	-	-	4%	9%



LIKELIHOOD OF RETURN TRIP TO HAWAI'I

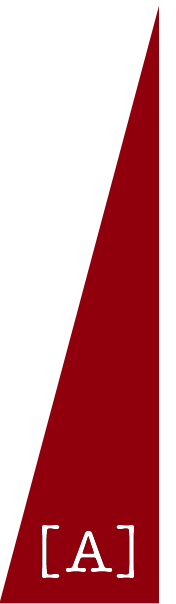
Taking COVID-19 Into Consideration

	Jun-21
I will visit again when I want to regardless of the pre-visit requirements	70%
I will visit again when the pandemic is over and most or all of the COVID mandates such as business/ attraction restrictions are removed	18%
I have no plans at this time to ever return to Hawai'i	8%
I will visit again when there is no pre-visit coronavirus tested required	4%
I will visit again when I have completed the vaccination process	0%

29 Q. Which of the following best describes when you will probably plan your next trip to Hawai'i?

[A]

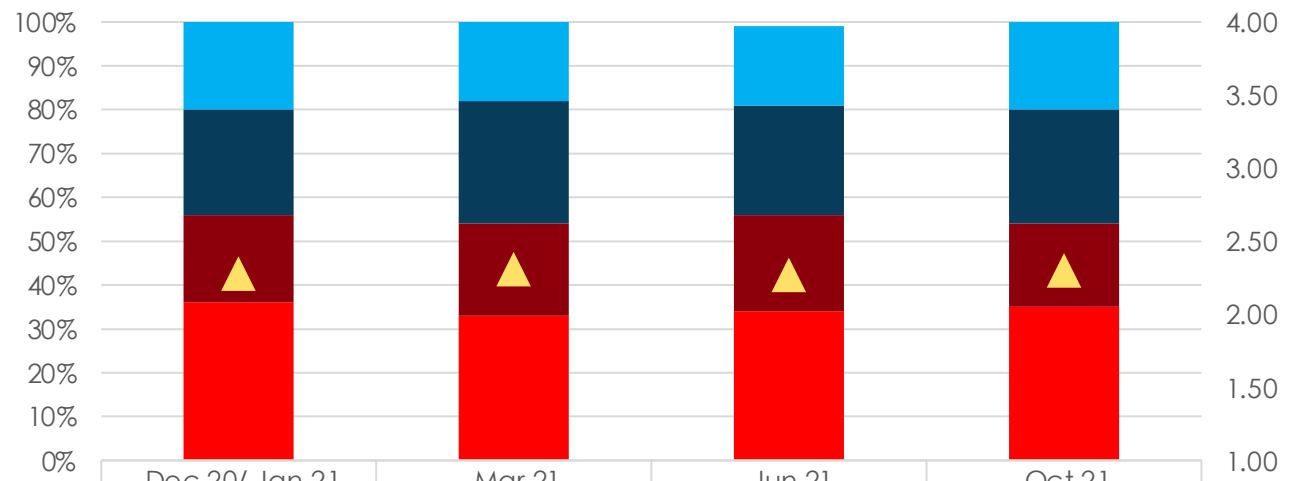
COVID-19



TRIP PLANNING – IMPACT OF HAWAII’S LOWER INFECTION RATE

4-pt Rating Scale

Hawai'i's relatively low COVID-19 infection rate is more of an incentive for repeat visitors and those with a college degree in the current study.



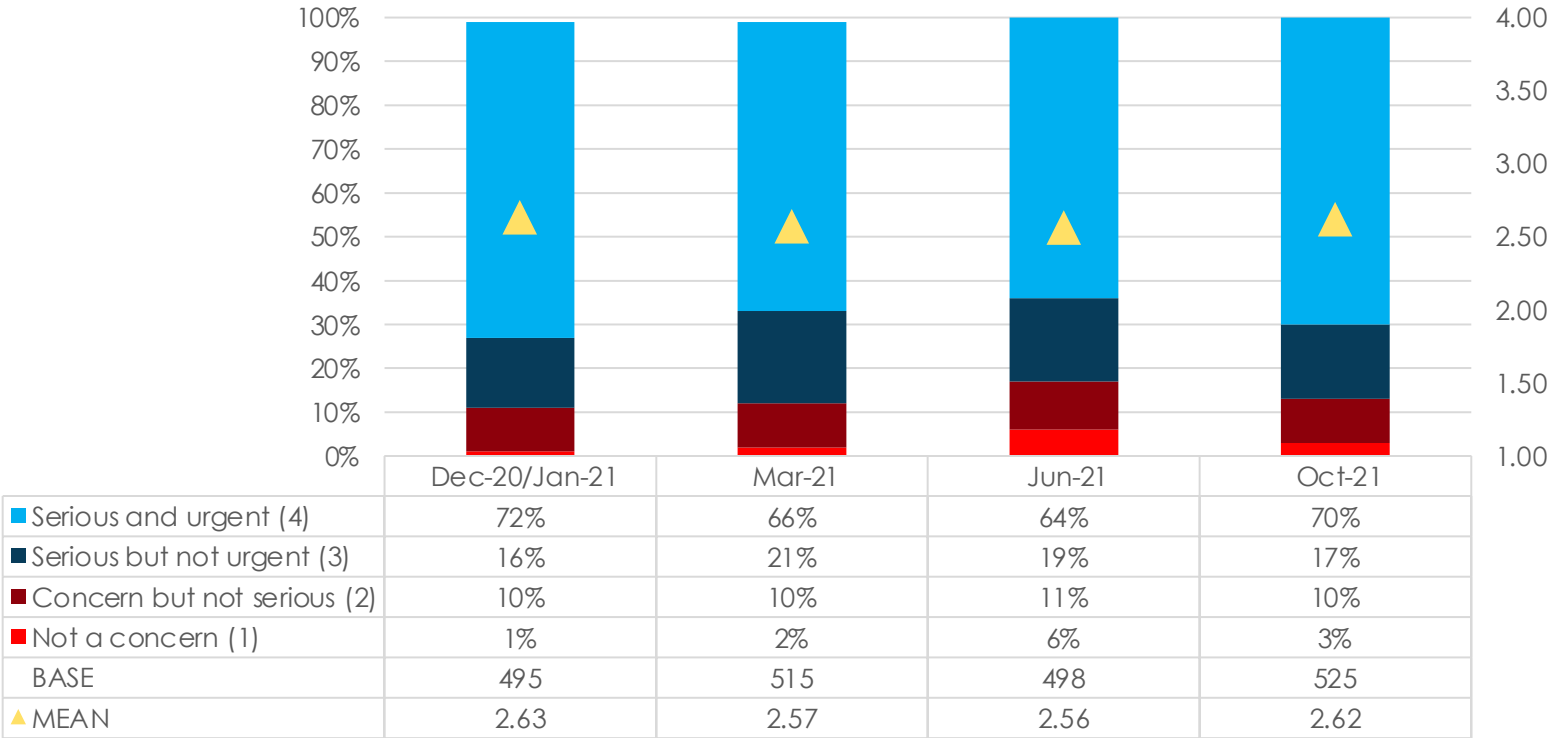
	Dec-20/ Jan-21	Mar-21	Jun-21	Oct-21
Very important (4)	20%	18%	18%	20%
One of several reasons (3)	24%	28%	25%	26%
Very little impact (2)	20%	21%	22%	19%
Had no bearing (1)	36%	33%	34%	35%
BASE	495	515	498	525
MEAN	2.28	2.31	2.27	2.30

31 Q. How important, if at all, was Hawai'i's relatively low rate of COVID infections as a reason to choose Hawai'i as a place to visit as compared to other places you might have gone?



PERCEPTION OF COVID-19 IMPACT ON HEALTH

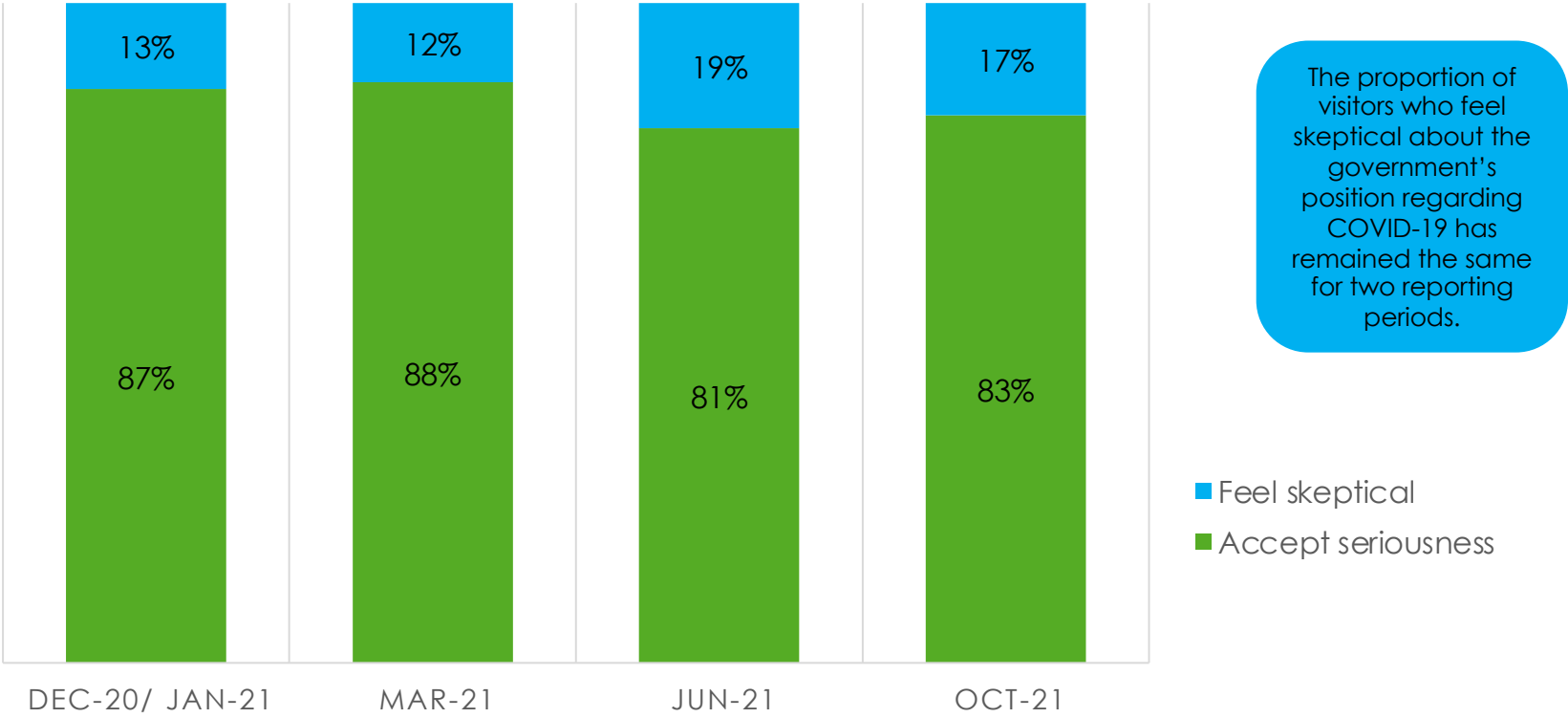
4-pt Rating Scale



32 Q. Overall, would you rate COVID-19 as being a...?



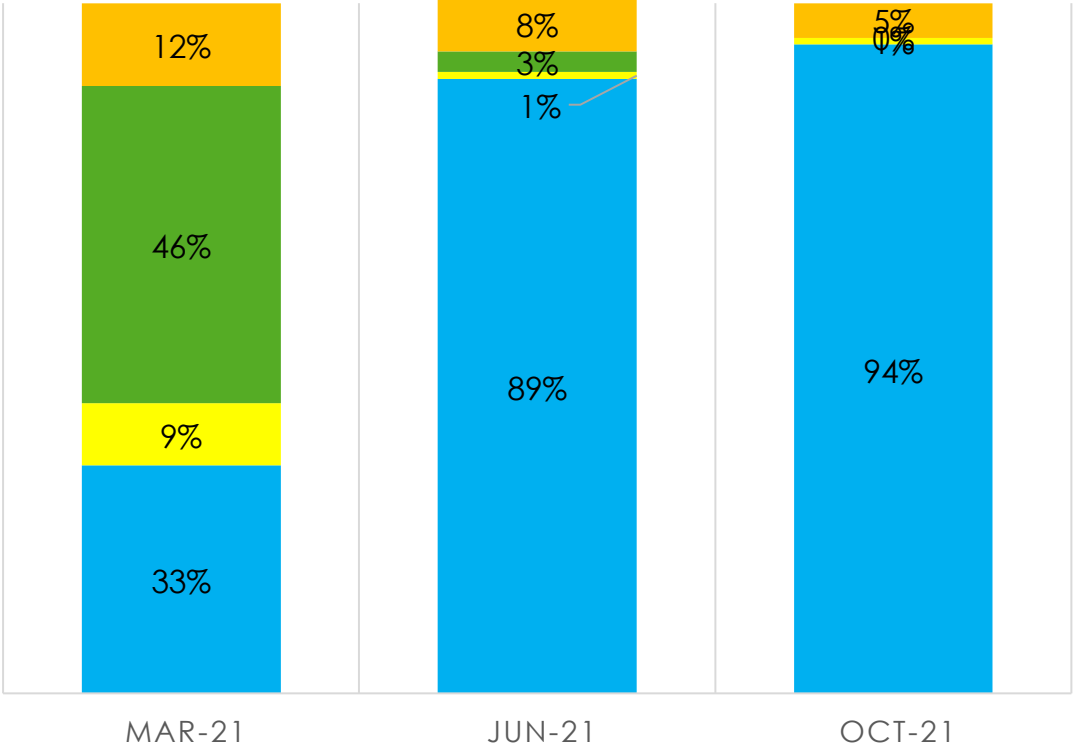
GOVERNMENT'S POSITION OF SERIOUSNESS OF COVID-19



33 Q. Generally speaking, overall, do you accept the Hawai'i government's position about the seriousness of this virus or are you left feeling skeptical?



COVID-19 VACCINATION – STATUS



Nearly all the visitors polled in the current study are fully vaccinated.

- Will not get vaccinated
- Planning to get vaccinated
- Need 1 more shot
- Fully vaccinated

34 Q. Which of the following best describes your current coronavirus vaccination status?



COVID-19 VACCINE – STATUS

SEGMENTATION ANALYSIS

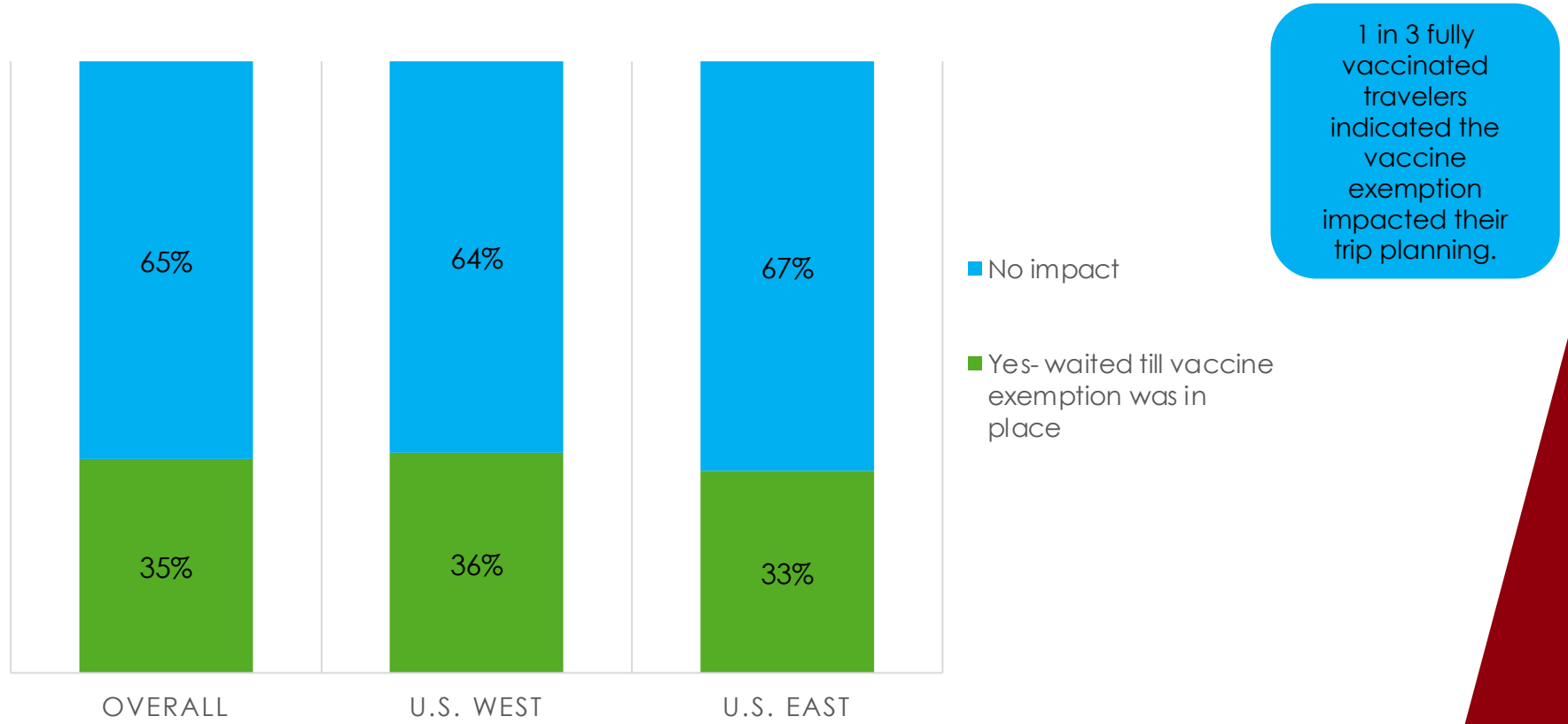
- *Repeat visitors were more likely to be fully vaccinated.*
- *The likelihood of being fully vaccinated increases with age.*

35 Q. Which of the following best describes your current coronavirus vaccination status?



[A]

COVID-19 VACCINE – HAWAI'I TRAVEL TIMING



36 Q (If fully vaccinated) Did you postpone your trip or wait to come until the vaccination exemption was in place?

[A]

SOURCES OF HAWAI'I COVID-19 INFORMATION

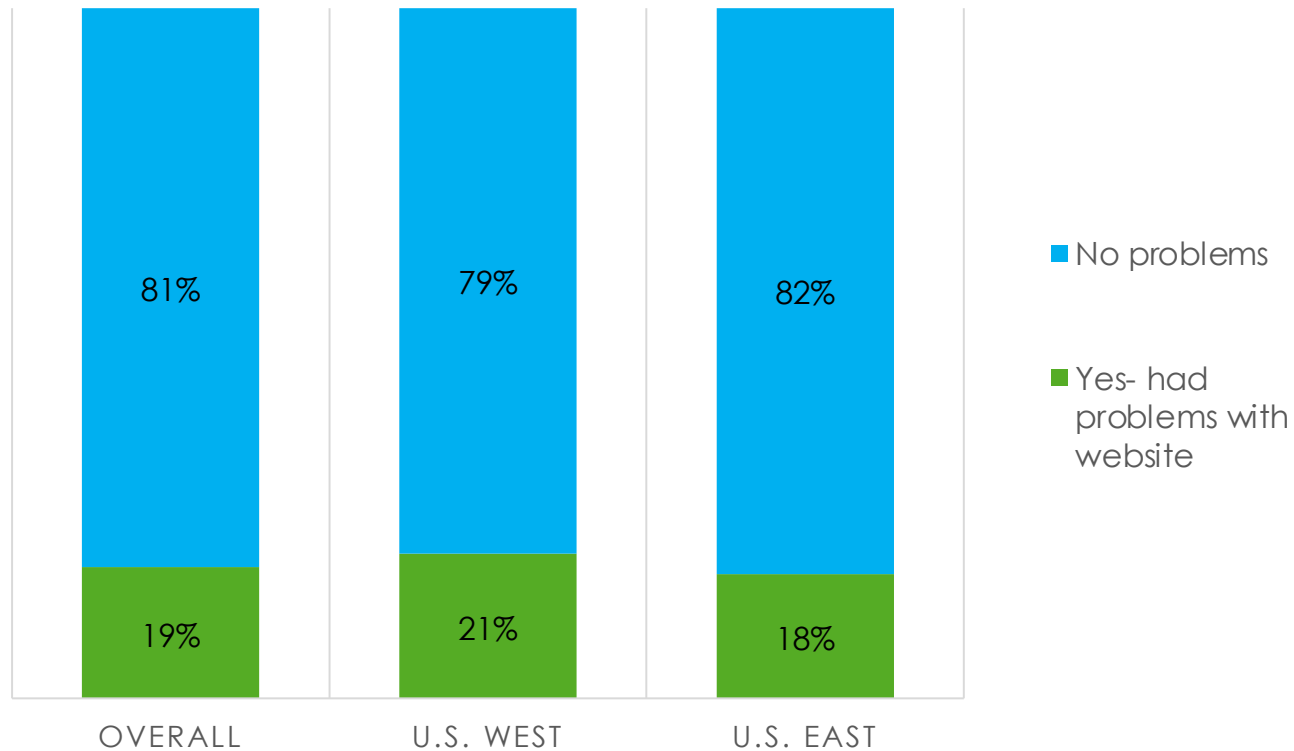
TOP RESPONSES

	Dec-20/ Jan-21 n=494	Mar-21 n=507	Jun-21 n=492	Oct-21 n=517
Safe Travels website (travel.Hawaii.gov)	95%	95%	93%	95%
Friends and family	38%	37%	38%	37%
GoHawaii.com	34%	27%	28%	25%
Social media/ blogs	14%	12%	14%	21%
Airline staff	17%	20%	13%	15%
Hotel staff	8%	12%	9%	14%
Online travel sites	10%	10%	11%	13%
HTA website (hawaiiitourismauthority.org)	20%	14%	13%	11%

37 Q. Which, if any, of the following sources did you use to get information about Hawai'i's COVID-19 guidelines?



SAFE TRAVELS WEBSITE - PROBLEMS



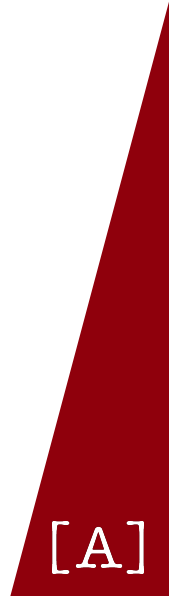
1 in 5 visitors say they had issues with the Safe Travels website.



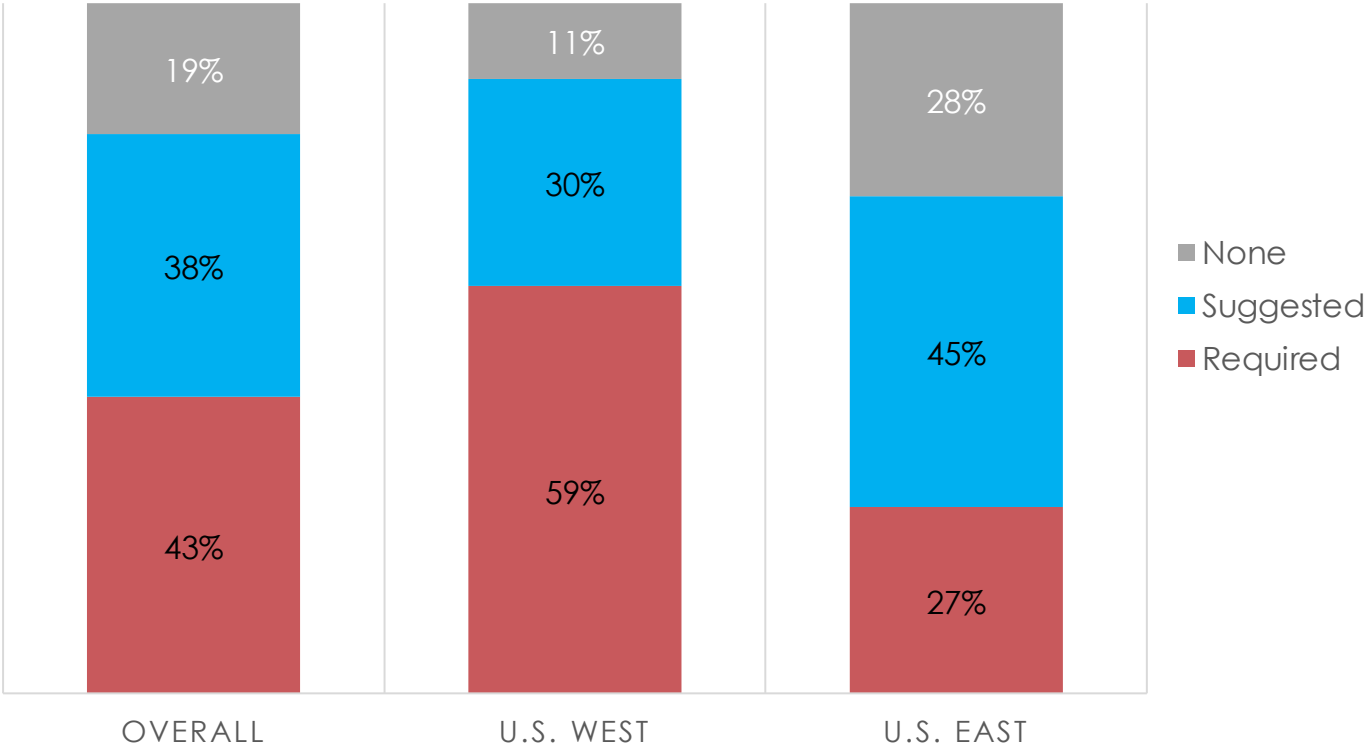
SAFE TRAVELS WEBSITE - PROBLEMS

TOP RESPONSES

	Oct-21 n=96
UX – confusing/ complicated	40%
Problem with QR code	13%
Problem uploading	11%
Problem with login	9%
Added stress to trip	7%
Requires too much information	7%
Could not add entire travel party	7%



COVID MANDATES IN HOME STATE

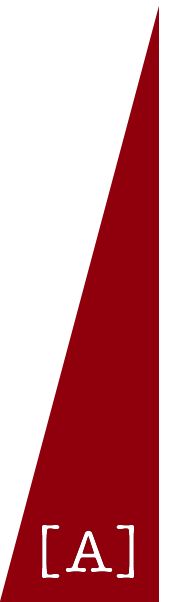


Travelers from U.S. West were more likely to be accustomed to required COVID-19 mandates than were those from other parts of the country.

40 Q. Back home, are mandates such as mask wearing, social distancing, and limits on size of gatherings required, or is it left to the individual's discretion whether to follow these mandates or not?

[A]

RESPONDENT PROFILE



RESPONDENT PROFILE

	Overall
GENDER	
Male	38%
Female	62%
HOUSEHOLD INCOME	
< \$40,000	3%
\$40,000 to \$59,999	5%
\$60,000 to \$79,999	8%
\$80,000 to \$99,999	10%
\$100,000 to \$124,999	14%
\$125,000 to \$149,999	10%
\$150,000 to \$174,999	7%
\$175,000 to \$199,999	6%
\$200,000 to \$249,999	6%
\$250,000 +	15%
Refused	16%
EDUCATION	
Post-graduate	34%
College graduate	34%
Some college	12%
Associates degree	11%
Vocational	2%
High school	3%

	Overall
AGE	
18-34	25%
35-49	31%
50-64	30%
65+	14%
MEAN	47.03
MEDIAN	46
TRIPS TO HAWAI'I	
First-time	39%
Repeat	61%
ISLANDS VISITED	
O'ahu	89%
Island of Hawai'i	11%
Maui	16%
Kaua'i	11%
Lana'i	1%
Moloka'i	-%
ISLANDS VISITED	
Single island	79%
Multi-island trip	21%

	Overall
ACCOMMODATIONS	
Hotel/ villa/ resort	60%
Condo/ apartment	15%
Timeshare	10%
Friends/ family	7%

