

**2008**

# **Visitor Satisfaction Monitoring Report**

**Second Quarter  
(April - June)**



State of Hawaii  
Department of Business, Economic Development & Tourism  
Research & Economic Analysis Division

## INTRODUCTION

This monitoring report presents selected preliminary statistics for the 2008 Visitor Satisfaction and Activity survey. The survey measures the opinions of visitors, regarding their satisfaction with Hawai'i as a visitor destination, from five major marketing areas: U.S. West, U.S. East, Japan, Canada and Europe (see Definition and Survey Methodology). The report highlights survey respondents' evaluation of the vacation experience, including: overall satisfaction with the 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.

This report is available in Adobe Acrobat form on the DBEDT website,

<http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>.

For further information about obtaining visitor data and other sources, contact the DBEDT Library at (808) 586-2424, or e-mail [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov) or DBEDT Research & Economic Analysis Division at (808) 586-2466.

## CONDITION OF VISITOR INDUSTRY

In the second quarter of (April – June) of 2008, there were a total of 1,668,307 visitors by air to the State, 10.1 percent less than the same quarter of 2007. Visitor arrivals from Canada with 63,618 (+14.8%) and Europe with 24,780 (+7.7%) showed improvements. At the same time, U.S. West with 714,031 (-15.4%), U.S. East with 443,295 (-11.5%) and Japan with 260,956 (-7.7%) showed decreases in visitors arrivals. However the average length of stay for all visitors was 9.07 days, similar (+.1%) to the same quarter a year ago.

In the first six months of 2008, total visitors arrived by air declined (-5%) to 3,499,442. The decline was caused by slowed visitor arrivals from U.S. West (-7.9%), U.S. East (-7.1%) and Japan (-5.7%). However, Canadian (+8%) and European (+3.9%) visitor arrivals were up. The combined length of stay was slightly longer at 9.38 days compared to 9.29 days in the first six months of 2007.

The decreased arrivals from the U.S. reflect the closure of Aloha and ATA airlines, loss of 2 Norwegian Cruise Line ships, increased fuel cost and a continued soft travel market.

## RESULTS

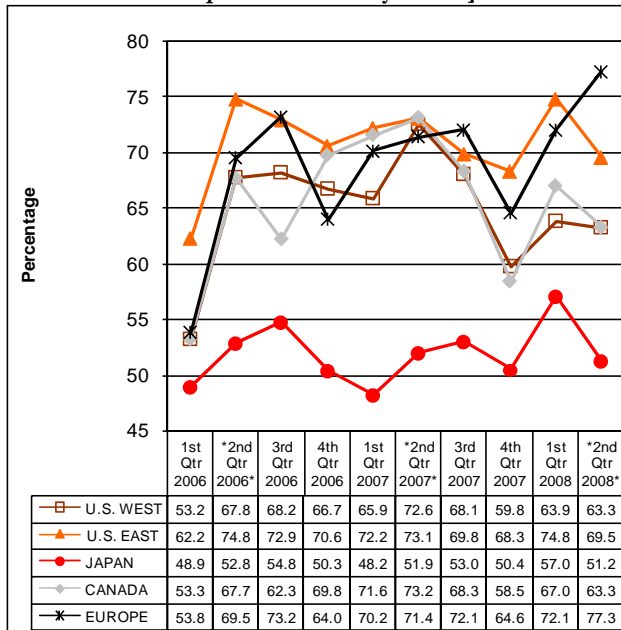
### Visitor Satisfaction Ratings

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

Generally, more than half of visitors from any major marketing area continued to rate their most recent trip to Hawai'i as *excellent* (see Figure 1).

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

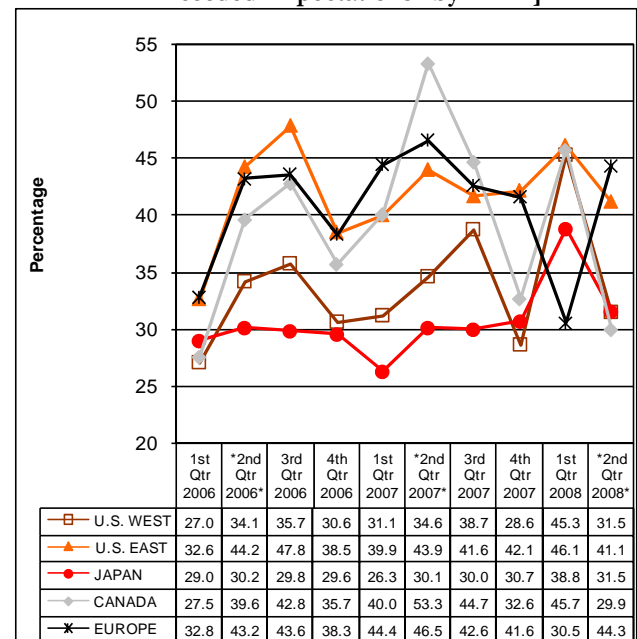


- In the second quarter of 2008, the proportion of U.S. West (63.3%, -9.3 percentage points) and Canadian (63.3%, -9.9 percentage points) visitors who rated their trip excellent were lower than the second quarter of 2007.
- Second quarter 2008 U.S. East visitor ratings (69.5%) were 3.6 percentage points lower than the ratings of the same period in 2007.
- Japanese visitors rated their second quarter of 2008 (51.2%) similar to the second quarter of 2007 (51.9%).
- More than three fourths (77.3%) of European visitors rated their trip in the second quarter of 2008 excellent, higher than any previous quarter in the past two years.

## Exceeded Expectations

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

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



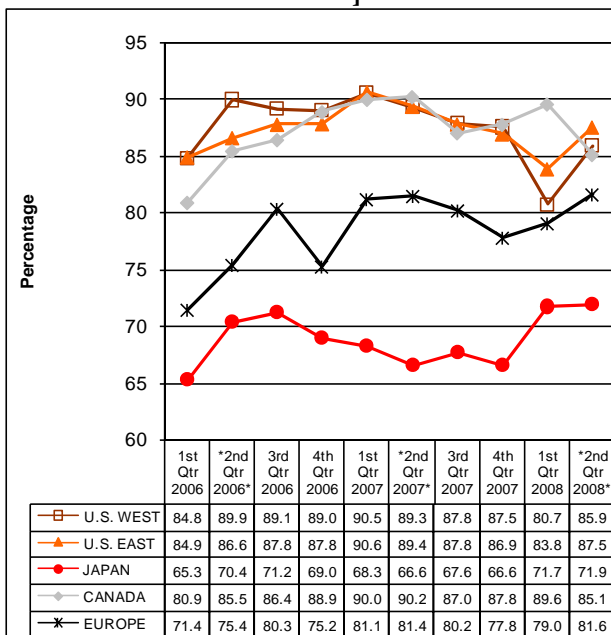
- In the second quarter of 2008, the proportion of U.S. West (31.5%, -3.1 percentage points), U.S. East (41.1%, -2.8 percentage points) and European (44.3%, -2.2 percentage points) visitors who said their recent trip to Hawai'i exceeded expectations were moderately lower than the second quarter of 2007.
- Second quarter 2008 visitor ratings among Japanese visitors (31.5%) were similar to the second quarter of 2006 (30.2%) and 2007 (30.1%).

- Noticeably less Canadian visitors said their trip exceeded expectations in the second quarter of 2008 (29.9%) than the same quarter in 2007 (53.3%) (See Figure 2).

### 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 reported to be *very likely to recommend* this destination to others. Word-of-mouth advertising is important in marketing Hawai'i. These referrals, in time, may develop more first time visitors to Hawai'i and encourage previous visitors to return. At least two-thirds of visitors in any MMA stated that they would be very likely to recommend Hawai'i. Even though there have been slight fluctuations from year to year, there has been no statistically significant changes in this rating (see Figure 3).

**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]

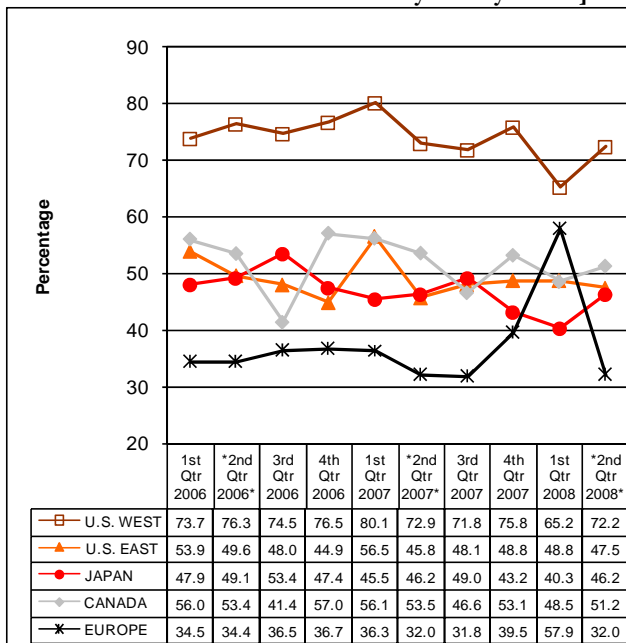


- In the second quarter of 2008, the proportion of U.S. West (85.9%) visitors who were very likely to recommend Hawai'i was moderately lower than the second quarter of 2006 (89.9%) or 2007 (89.3%).
- Ratings among U.S. East visitors in the second quarter of 2008 (87.5%) were moderately lower than in the second quarter of 2007 (89.4%).
- In the second quarter of 2008 (71.9%), the proportion of Japanese visitors that were very likely to recommend Hawai'i improved 5.3 percentage points compared to the second quarter of 2007.
- Canadian visitors were less likely to recommend Hawai'i in the second quarter of 2008 (81.6%) compared to the second quarter of 2007 (90.2%).
- European visitors rated their second quarter of 2008 (81.6%) similar to the second quarter of 2007 (81.4%).

## Likelihood to Revisit Hawai'i

A visitor's decision to return to Hawai'i is influenced by positive experiences on the most recent trip and other factors such as curiosity for new experiences, available time, financial situation, and other commitments. Likelihood to revisit Hawai'i, as an indicator, helps to estimate future demand and changes in desires. Visitors appeared to be satisfied with their vacations and their sentiments toward returning in the near future seemed positive (see Figure 4).

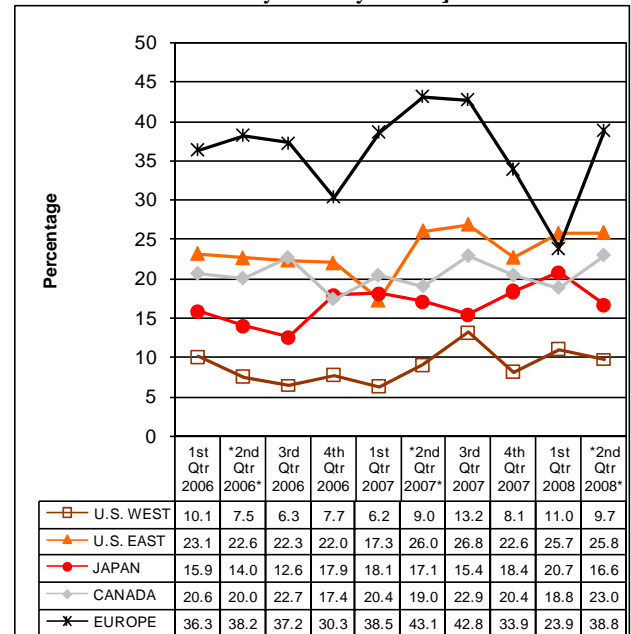
**Figure 4: Very Likely to Revisit Hawai'i**  
[Percentage of visitors who are "Very Likely" to revisit Hawai'i in the next five years by MMA]



- The proportion of U.S. West visitors who were likely to return to Hawai'i in the second quarter of 2008 (72.2%) was similar to the second quarter of 2007 (72.9%).
- In the second quarter of 2008, the proportion of Japanese (46.2%) and European (32%) visitors were unchanged compared to the second quarter of 2007.
- Moderately less Canadian visitors in the second quarter of 2008 (51.2%) were very likely to revisit Hawai'i compared to the second quarter of 2006 (53.4%) or 2007 (53.5%).

## 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]



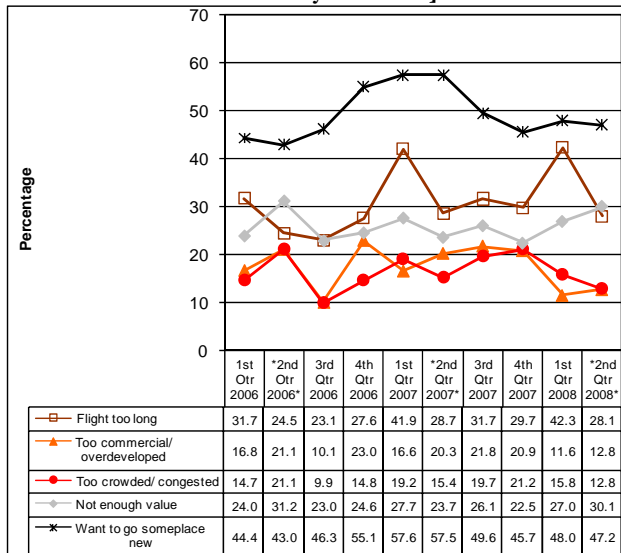
- The percentage of respondents who answered that they were "Not too likely" or "Not at all likely" to visit Hawai'i in the next five years continued to be fairly low among U.S. West visitors, moderately higher for Japan, Canada and U.S. East, while highest for European visitors (see Figure 5).
- The proportion of U.S. West (9.7%, +.7 percentage points), U.S. East (25.8%, -.2 percentage points) and Japanese (16.6%, -.5 percentage points) visitors who were not likely to return in the next five years in the second quarter of 2008 was similar to the second quarter of 2007.
- The proportion of Canadian respondents who will not revisit the islands in the next five years in the second quarter of 2008 (23%) was 4 percentage points higher than the second quarter of 2007.

- In the second quarter of 2008, the percentage of European visitors who were not likely to revisit (38.8%) was 4.3 percentage points lower than the same period in 2007 (Figure 5).

### Reasons for Not Revisiting Hawai'i

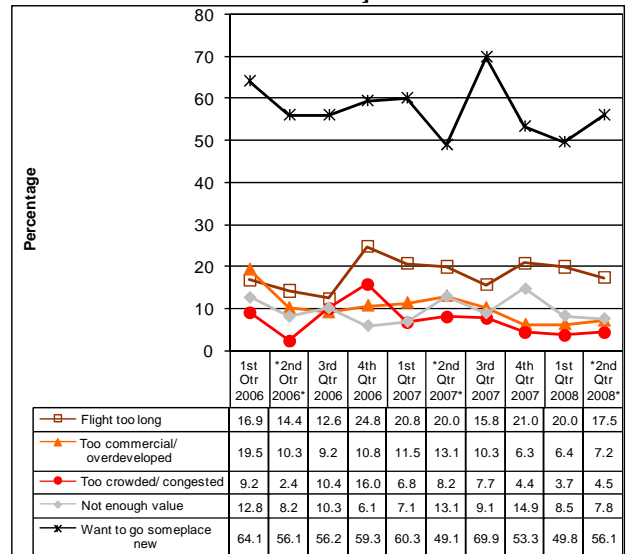
Repeatedly, many of the visitors not planning to return in the next five years tell us that it is because they want to go someplace new (Figure 6 and Figure 7). Note that the statistic reported for each reason for not revisiting Hawai'i is the percentage of those who were *Not Likely to Revisit Hawai'i* (from previous section).

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



- Among the proportion of U.S. visitors who were not likely to revisit in the second quarter of 2008, noticeably less said that Hawai'i was too commercial/overdeveloped (12.8% or 2% of all U.S. visitors) and they wanted to go someplace new (47.2% or 7.4% of all U.S. visitors) compared to the second quarter of 2007 (See Figure 6).
- At the same time, the proportion of U.S. visitors that felt Hawai'i provided not enough value (30.1% or 4.7% of all U.S. visitors) was evidently more than the second quarter of 2007 (23.7% or 3.7% of all U.S. visitors).

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



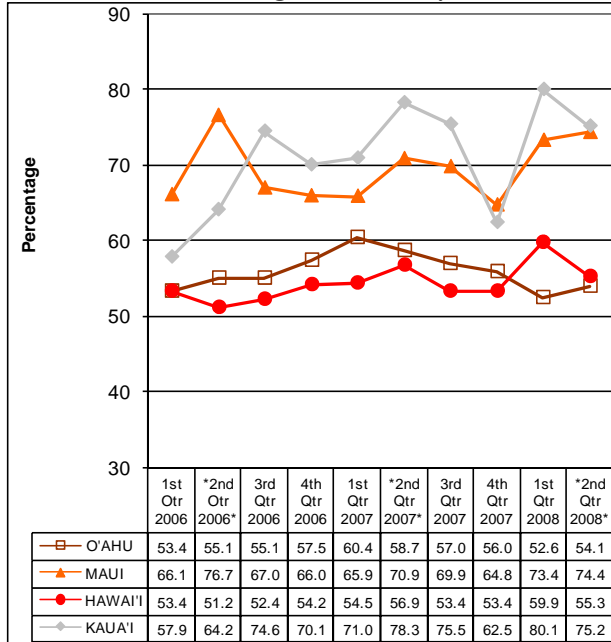
- Of the 16.6 percent of Japanese visitors in the second quarter of 2008 who were not likely to return, 56.1 percent (9.3% of all Japanese visitors) desired to visit someplace else, higher than the same period in 2007 (49.1% or 8.4% of all Japanese visitors) however similar to the same period in 2006 (56.1% or 7.9% of all Japanese visitors) (see Figure 7).
- Among the proportion of Japanese visitors who were not likely to revisit in the second quarter of 2008, fewer said that Hawai'i was too commercial/overdeveloped (7.2% or 1.2% of all Japanese visitors) and not enough value (7.8% or 1.3% of all Japanese visitors) compared to the second quarter of 2007.



## Individual Island Experience

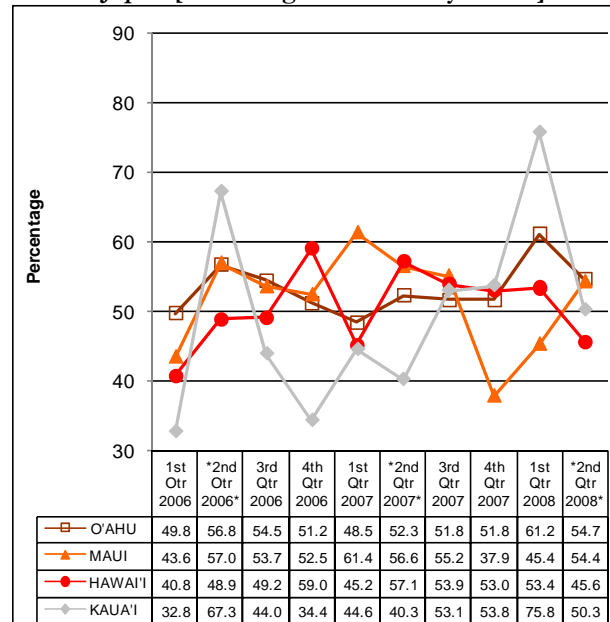
Each island has unique characteristics, activities and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip.

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



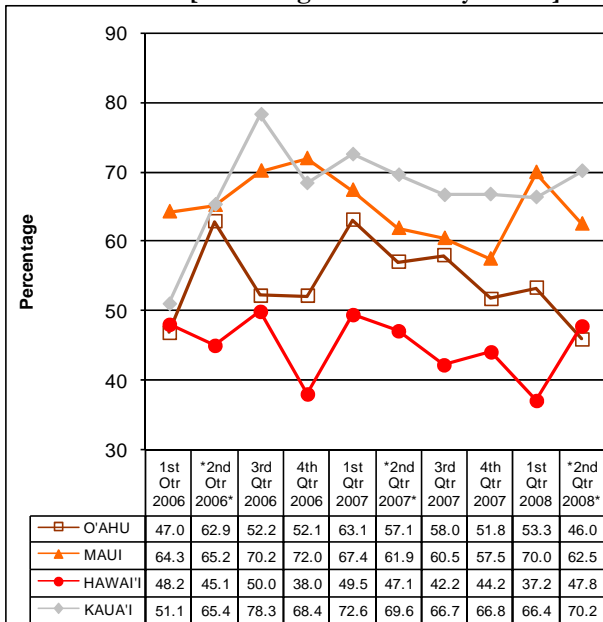
- Among U.S. visitors, visitors to Maui and Kaua'i were more likely to say they had an excellent experience than visitors to O'ahu or Hawai'i Island (see Figure 8).
- The proportion of U.S. visitors who rated O'ahu (54.1%, -4.6 percentage points) and Kaua'i (75.2%, -3.1 percentage points) excellent were moderately lower than the second quarter of 2007.
- Maui ratings among U.S. visitors in the second quarter of 2008 (74.4%) were 3.5 percentage points higher than the same period in 2007.
- U.S. visitors rated Hawai'i Island (55.3%) 1.6 percentage points higher compared to the second quarter of the previous year.

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



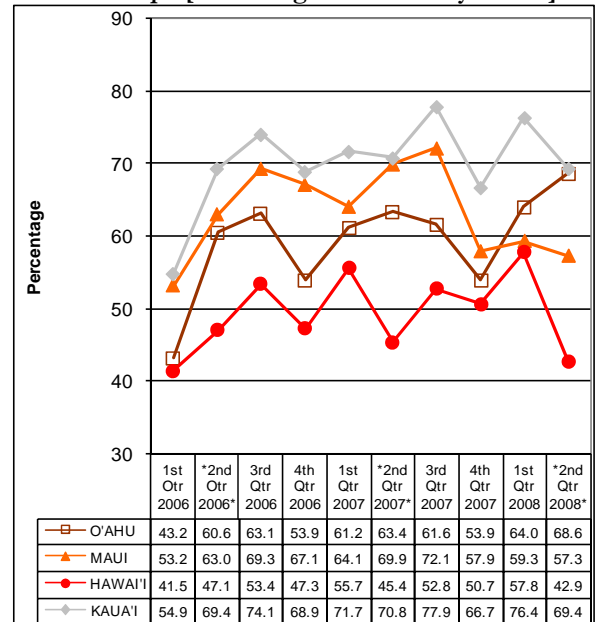
- The proportion of Japanese visitors that rated O'ahu excellent in the second quarter of 2008 (54.7%) was moderately higher (+2.4 percentage points) compared to the same period in 2007 (Figure 9).
- Maui ratings among Japanese visitors in the second quarter of 2008 (54.4%) were 2.2 percentage points lower than ratings in the second quarter of 2007.
- In the second quarter of 2008 (45.6%), Hawai'i Island ratings among Japanese visitors were significantly lower than the second quarter of 2007 (57.1%).
- Kaua'i island ratings in the second quarter 2008 (50.3%) among Japanese visitors were significantly higher than the second quarter of 2007 (40.3%).

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



- In the second quarter of 2008 (46%), Canadian satisfaction ratings declined for O'ahu (-11.1 percentage points) compared to the second quarter 2007 (see Figure 10).
- Canadian visitor satisfaction levels for the island of Maui (62.5%, +.6 percentage points), Hawai'i Island (47.8%, +.7 percentage points) and Kaua'i (70.2%, +.6 percentage points) in the second quarter of 2008 were similar to the second quarter of 2007.

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



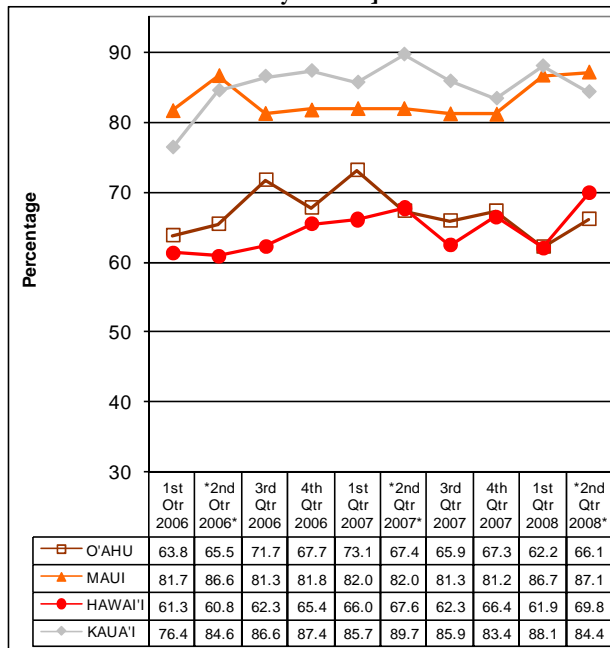
- In the second quarter of 2008, European satisfaction ratings for O'ahu (68.6%) were 5.2 percentage points higher than the second quarter of 2007 and 8 percentage points higher than the second quarter of 2006 (Figure 11).
- Considerably fewer European visitors rated Maui (57.3%, -12.6 percentage points) excellent in the second quarter of 2008 compared to the second quarter of 2007.
- The proportion of European visitors that rated Hawai'i Island excellent in the second quarter of 2008 (42.9%) was moderately lower compared to the same period in 2006 (47.1%) or 2007 (45.4%).
- Kaua'i ratings among European visitors (69.4%) were 1.4 percentage points lower than the second quarter of 2007.



## Individual Island Recommendation

Again, when visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family. More than half of visitors continue to be *very likely to recommend* all islands to others (see Figures 12 to 15).

**Figure 12: Very Likely to Recommend Island – U.S. [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**

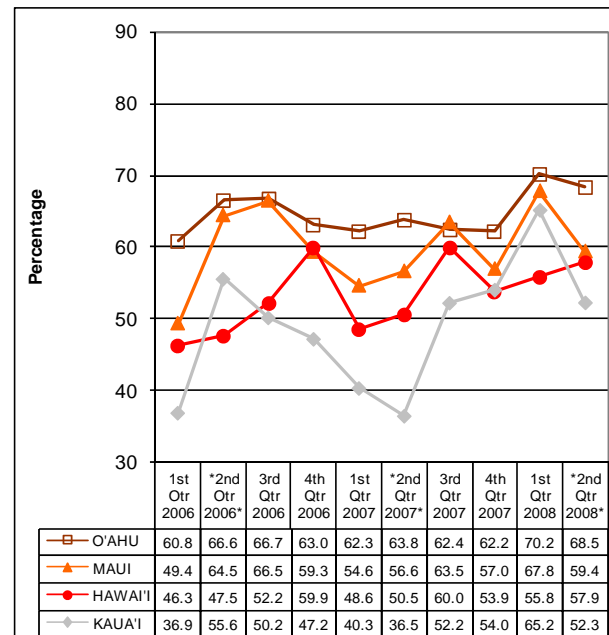


- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui and Kaua'i over O'ahu and Hawai'i Island (see Figure 12).
- From the fourth quarter of 2007 to the second quarter of 2008, Maui and Kaua'i ratings were similar. In the same period, O'ahu and Hawai'i Island had similar ratings.
- The proportion of U.S. visitors that were very likely to recommend O'ahu in the second quarter of 2008 (66.1%) was 1.3 percentage points lower than the second quarter of 2007.
- Compared to the second quarter of 2007, ratings on Maui improved 5.1 percentage

points to 87.1 percent in the second quarter of 2008.

- Hawai'i Island ratings among U.S. visitors (69.8%) were only 2.2 percentage points higher than the second quarter of 2007 but 9 percentage points higher than the second quarter of 2006.
- Kaua'i ratings among U.S. visitors (84.4%) were 5.3 percentage points lower than the second quarter of 2007.

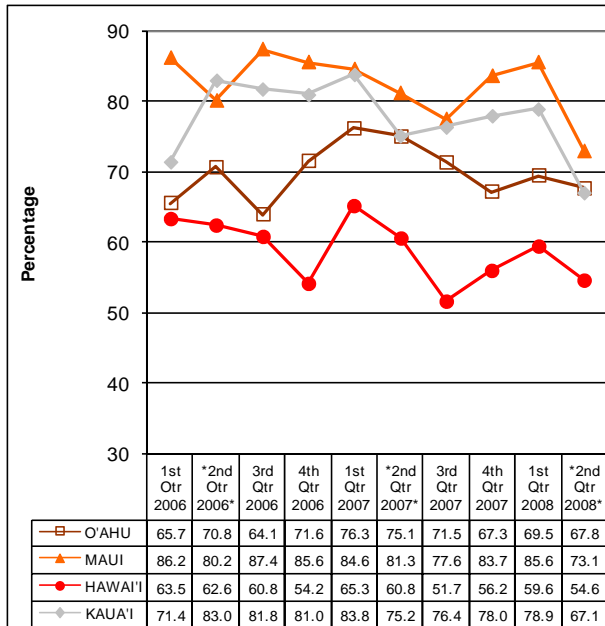
**Figure 13: Very Likely to Recommend Island – Japan [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**



- In the second quarter of 2008, Japanese visitors were more likely to recommend O'ahu over Maui, Hawai'i Island and Kaua'i (see Figure 13).
- At the same time, Japanese visitors were considerably more likely to recommend Hawai'i Island (57.9%, +7.4 percentage points) and Kaua'i (52.3%, +15.8 percentage points) compared to the second quarter of 2007.

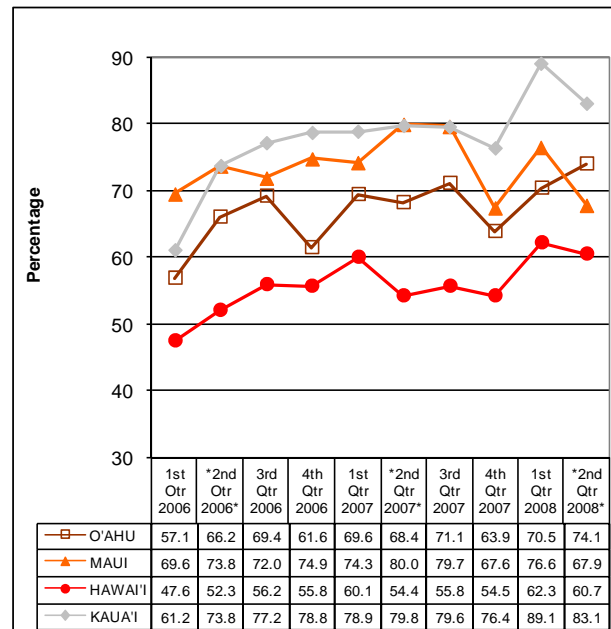
- In the second quarter of 2008, moderately more Japanese visitors were very likely to recommend O‘ahu (68.5%, +4.7 percentage points) and Maui (59.4%, +2.8 percentage points) as a vacation place compared to the second quarter of 2007 (Figure 13).

**Figure 14: Very Likely to Recommend Island – Canada [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**



- All islands recorded lower proportions of Canadian visitors who were very likely to recommend in the second quarter of 2008 compared to the second quarter of 2007. Canadian visitors in the second quarter of 2008 were noticeably less likely to recommend O‘ahu (67.8%, -7.3 percentage points), Maui (73.1%, -8.2 percentage points), Hawai‘i Island (54.6%, -6.2 percentage points) and Kaua‘i (67.1%, -8.1 percentage points) compared to the second quarter of the previous year (see Figure 14).
- Since the first quarter of 2006, Canadian visitors were less likely to recommend Hawai‘i Island compared to O‘ahu, Maui and Kaua‘i.
- In contrast to the previous quarter, O‘ahu, Maui and Kaua‘i ratings were more similarly rated in the second quarter of 2008.

**Figure 15: Very Likely to Recommend Island - Europe [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**

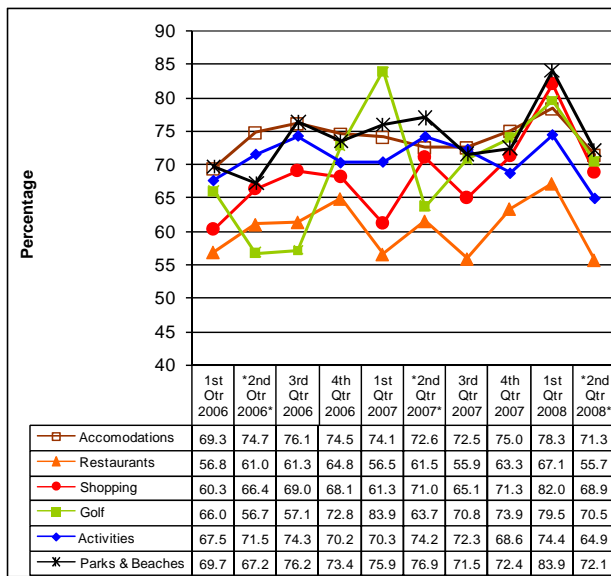


- Since the fourth quarter of 2007, European visitors were more likely to recommend Kaua‘i over O‘ahu, Maui and Hawai‘i Island (Figure 15).
- O‘ahu ratings (74.1%) were 5.7 percentage points higher than the second quarter of 2007 and 7.9 percentage points higher than the second quarter of 2006.
- Noticeably less European visitors were very likely to recommend Maui in the second quarter of 2008 (67.9%) than the second quarter in the previous year (80%).
- The proportion of European visitors who were very likely to recommend Hawai‘i Island in the second quarter of 2008 (60.7%) was 6.3 percentage points higher than the same period of 2007 and 8.4 percentage points higher than the same period in 2006 (See Figure 15).
- At the same time, Kaua‘i ratings (83.1%) among European visitors were 3.3 percentage points higher than the second quarter of 2007 and 9.3 percentage points than the second quarter of 2006.

## 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.

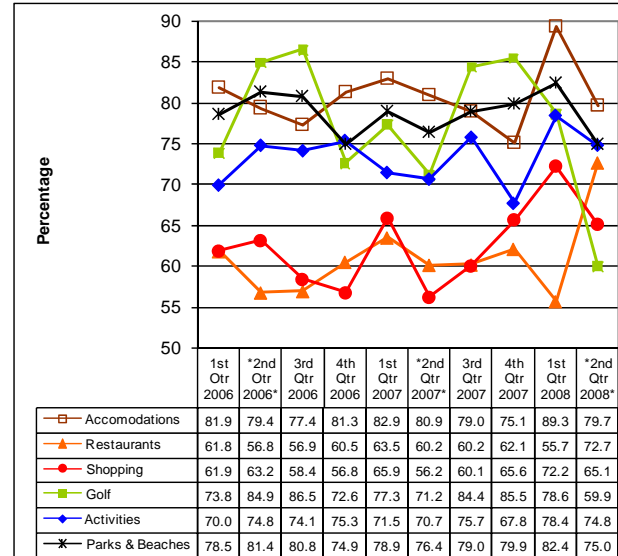
**Figure 16: Detailed Satisfaction Ratings for U.S. Visitors to O'ahu [Percentage of U.S. visitors to O'ahu who were "Very Satisfied" with Attribute]**



- The proportion of U.S. visitors who were very satisfied with O'ahu's restaurants continued to be distinctively lower than the other attributes on the island (see Figure 16).
- Less U.S. visitors in the second quarter of 2008 were very satisfied with O'ahu's restaurants (55.7%, -5.8 percentage points) and parks and beaches (72.1%, -4.8 percentage points) compared to the second quarter of 2007.
- Considerably less U.S. visitors in the second quarter of 2008 were very satisfied with O'ahu's activities (64.9%, -9.3 percentage compared to the second quarter of 2007. Moreover, evidently fewer U.S. visitors were

very satisfied with the value for their money, service, variety and excitement.

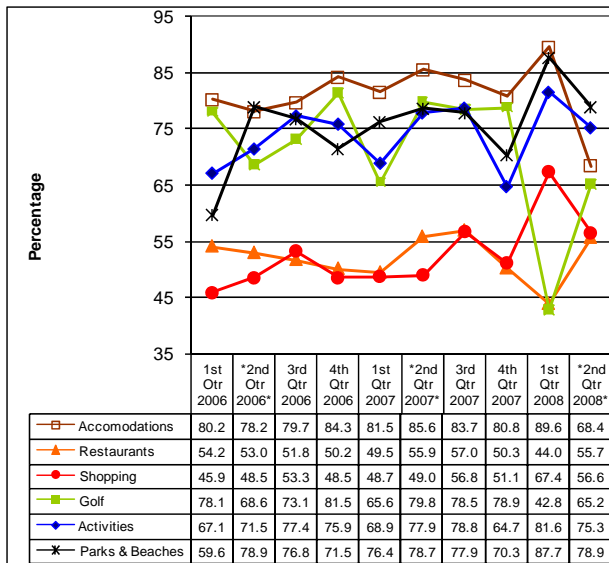
**Figure 17: Detailed Satisfaction Ratings for U.S. Visitors to Maui [Percentage of U.S. visitors to Maui who were "Very Satisfied" with Attribute]**



- In the second quarter of 2008, accommodations (79.7%) on Maui were the highest rated attribute on the island (Figure 17).
- In the second quarter of 2008, notably more U.S. visitors enjoyed Maui's restaurants (72.7%, +12.5 percentage points) and shopping (65.1%, +8.9 percentage points) compared to the second quarter of 2007.
- The proportion of U.S. visitors who enjoyed Maui's restaurants was much higher in the second quarter of 2008 than any period in the past two years. In the second quarter of 2008 satisfaction ratings (very satisfied) for a restaurant's locations, service, value for their money and quality were significantly higher than the second quarter of 2007. Restaurant ratings surpassed golf and shopping in satisfaction.
- Regarding shopping satisfaction ratings on Maui, satisfaction levels were considerably higher for the value for their money, variety, quality, sufficient shopping places, locations and service.

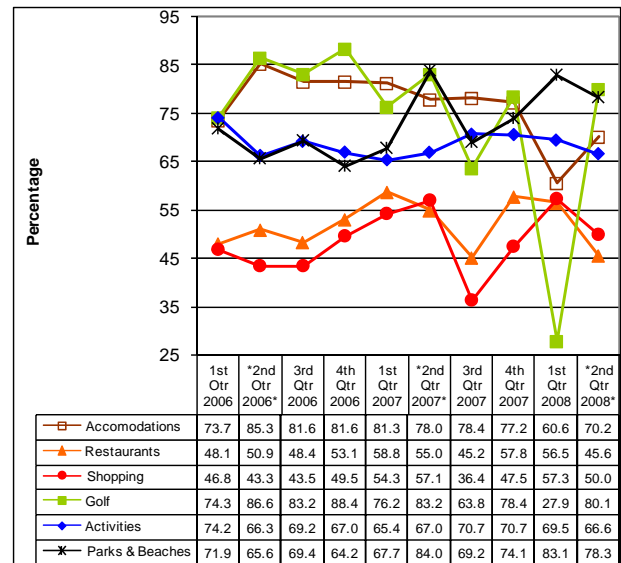
- In the second quarter of 2008, moderately more were very satisfied with Maui's activities (74.8%, +4.1 percentage points) (See Figure 17).

**Figure 18: Detailed Satisfaction Ratings for U.S. Visitors to Kaua'i [Percentage of U.S. visitors to Kaua'i who were "Very Satisfied" with Attribute]**



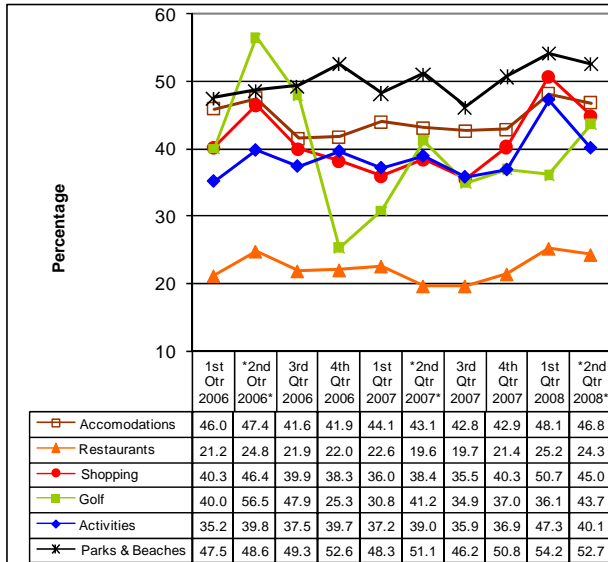
- In the second quarter of 2008, ratings regarding Kaua'i's restaurants and shopping among U.S. visitors continued to be lower than the other attributes. However, U.S. visitors were more satisfied with the island's shopping (56.6%) compared to the same period of either 2006 (48.5%) or 2007 (49%) (Figure 18). Furthermore, notably more U.S. visitors were very satisfied with the quality and the taste of the food at Kaua'i's restaurants compared to the second quarter of 2007.
- Satisfaction ratings in the second quarter of 2008 on Kaua'i's accommodations (68.4%, -17.2 percentage points) were significantly lower than the second quarter of 2007. Kaua'i's accommodations marked a record low rating in the second quarter of 2008 as satisfaction ratings for its cleanliness/comfort, facility, service and locations significantly declined.

**Figure 19: 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]**



- Second quarter ratings in 2008 from U.S. visitors regarding accommodations (70.2%) on Hawai'i Island slid 7.8 percentage points compared to the second quarter of 2007 and 15.1 percentage points compared to the second quarter of 2006 (Figure 19). In addition, the proportion of U.S. visitors who were very satisfied with the service, facility and locations regarding accommodations on Hawai'i island notably decreased compared to the second quarter of 2007.
- In the second quarter of 2008, shopping (50%, -7.1 percentage points) and restaurants (45.6%, -9.4 percentage points) ratings on the Hawai'i Island declined compared the same period in 2007. Restaurant satisfaction levels were significantly lower for its location, value for their money, and service. At the same time, shopping satisfaction levels were significantly lower for its sufficient number of shopping places, value for their money, quality, locations, and variety of merchandise.

**Figure 20: Detailed Satisfaction Ratings for O’ahu – Japan [Percentage of Japan visitors to O’ahu who were “Very Satisfied” with the Attribute]**

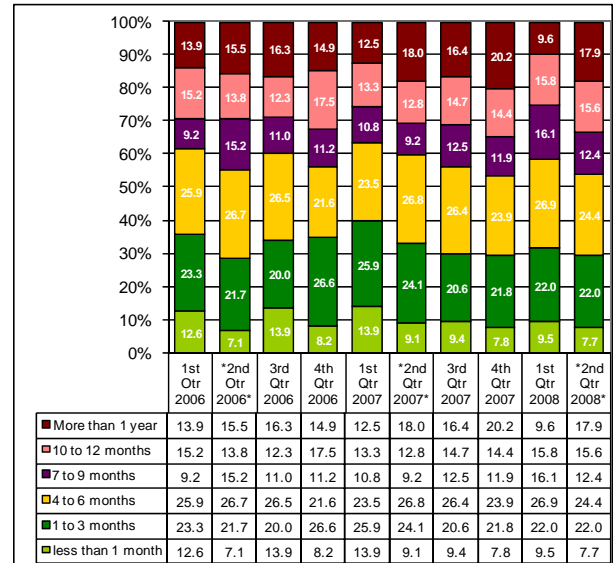


- O’ahu’s parks and beaches continued to be the highest rated attribute among Japanese visitors (see Figure 20).
- However, Japanese visitor ratings regarding O’ahu’s restaurants remained distinctively lower than the other attributes on the island.
- Japanese visitor ratings regarding all of O’ahu’s attributes showed some improvement over the second quarter of the 2007, but significantly with shopping (45%, +6.6 percentage points). In addition, evidently more Japanese visitors were very satisfied with the variety of merchandise, value for their money, sufficient number of shopping places, locations, and quality.

## Trip Planning Cycle

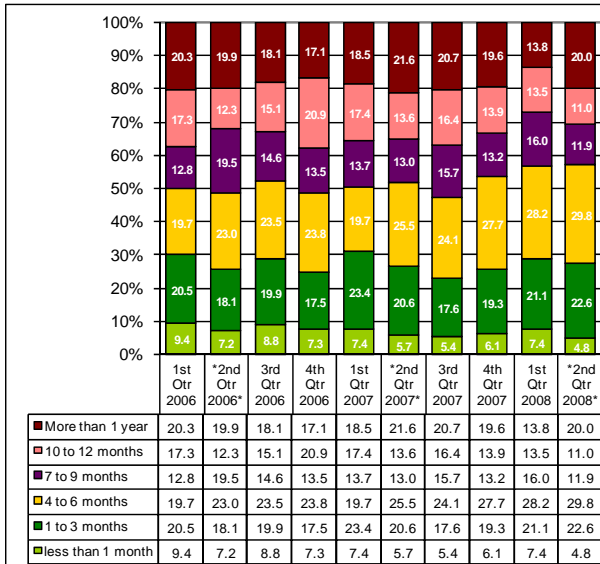
Information on how visitors plan their trips and when they make major decisions can greatly enhance preparation of effective marketing and promotion plans.

**Figure 21: When Did U.S. West Visitors Decide to Visit Hawai’i in Advance of Departure [Percentage of U.S. West visitors]**



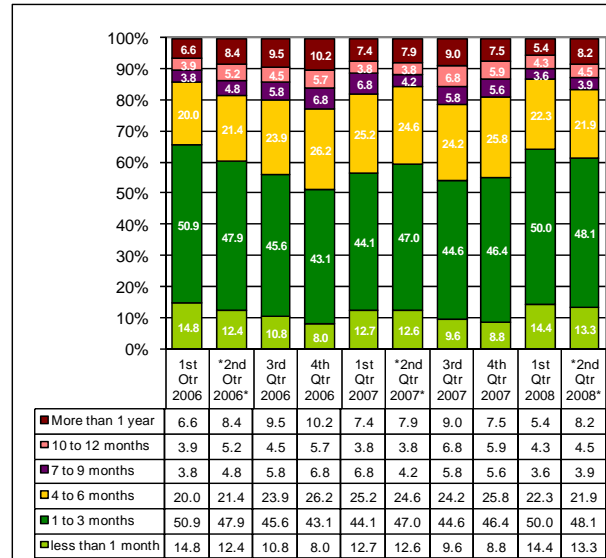
- In the second quarter of 2008, U.S. West visitors maintained a very similar decision pattern compared to the second quarter of 2007 despite the decrease in air seat capacity, due to the shutdown of Aloha Airlines and ATA (Figure 21).
- The proportion of U.S. West visitors who decided three months or less was slightly lower in the second quarter of 2008 (29.7%) than the second quarter of 2007 (33.2%).

**Figure 22: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]**



- The proportion of U.S. East visitors who decided to come to Hawai'i one to six months before arriving in the second quarter of 2008 (52.4%) was higher than the second quarter of 2006 (41.1%) or 2007 (46.1%) (see Figure 22).
- In the second quarter of 2008, less U.S. East visitors made their decision to visit Hawai'i ten months or more (31%) before they arrived than the second quarter of 2006 (32.2%) or 2007 (35.2%).

**Figure 23: When Did Japan Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of Japanese visitors]**



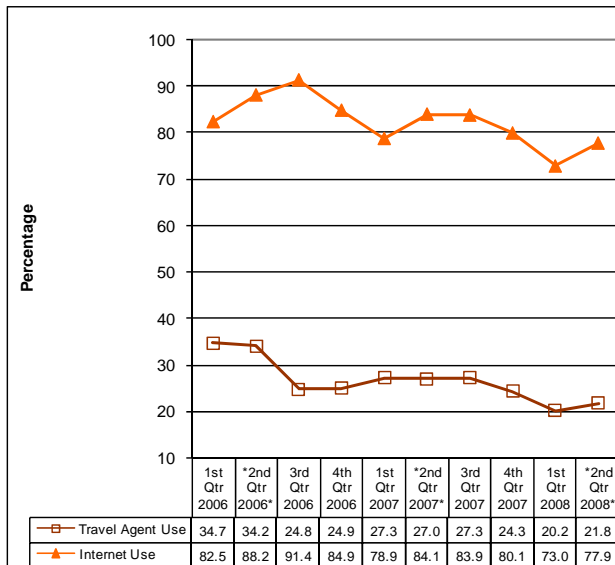
- In the second quarter of 2008, Japanese visitors maintained a very similar decision pattern compared to the second quarter of 2006 or 2007 (see Figure 23).



## Internet and Travel Agent Use

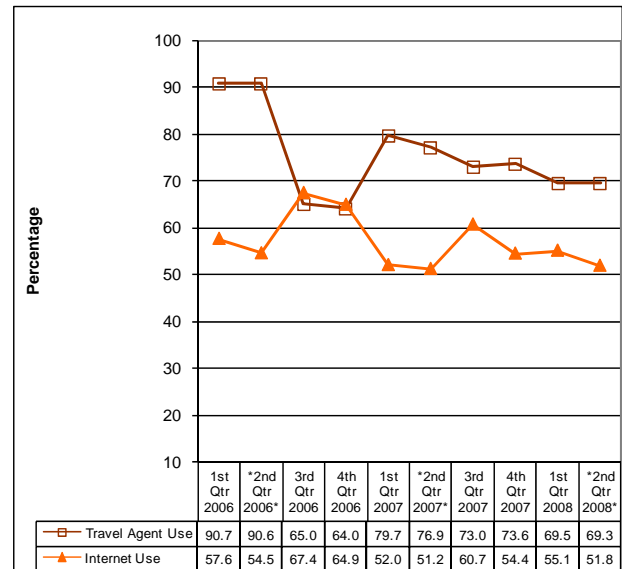
The use of the Internet or a travel agent for trip planning and booking differs quite appreciably between U.S. and Japanese travelers to Hawai'i.

**Figure 24: Internet and Travel Agent Use -- U.S.**  
[Percentage of U.S. visitors]



- Internet use for trip planning among U.S. visitors in the second quarter of 2008 decreased to 77.9 percent of all U.S. visitors to Hawai'i compared to 88.2 percent in the second quarter of 2006 or 84.1 percent in the second quarter of 2007 (see Figure 24).
- Travel agent use also decreased to 21.8 percent of all U.S. visitors in the second quarter of 2008 compared to 34.2 percent in the second quarter of 2006 or 27 percent in the second quarter of 2007.

**Figure 25: Internet and Travel Agent Use – Japan**  
[Percentage of Japanese visitors]

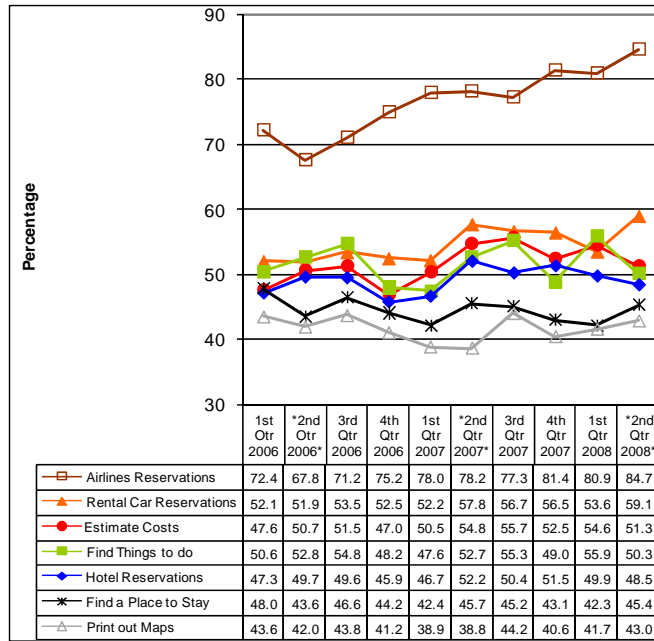


- Japanese travel agent users were more prevalent than Internet users. In the second quarter of 2008, travel agent users made up 69.3 percent of all Japanese visitors. However, the proportion of travel agent users decreased from 76.9 percent of total Japanese visitors in the second quarter of 2007 (see Figure 25).
- Internet usage remained around 50 percent and was at 51.8 percent of Japanese visitors in the second quarter of 2008. Internet use for the second quarter of this year was similar to the same quarter of 2007 (51.2%).

## Internet Use

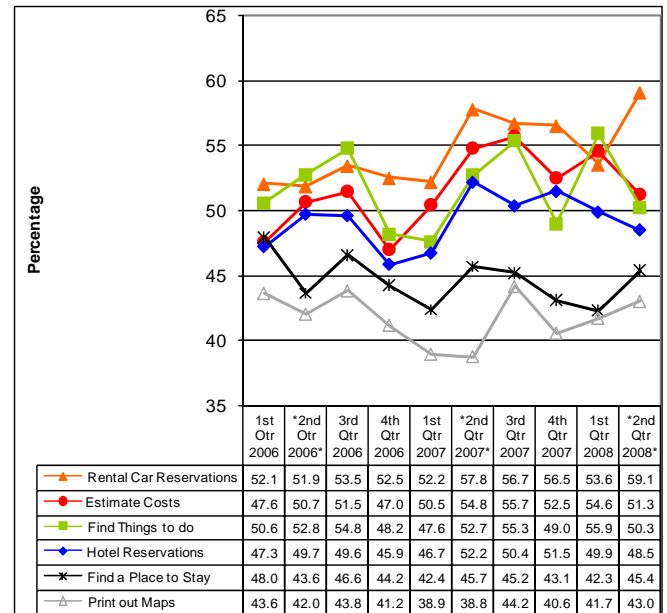
Note that the statistic reported for each internet use is the percentage of those who used the internet (from previous section).

**Figure 26: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]**



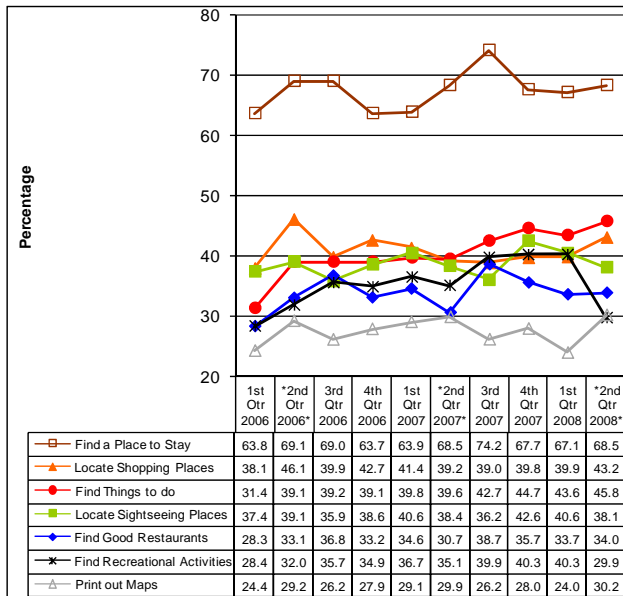
- Of the 77.9 percent of U.S. visitors who used the internet in the second quarter of 2008, 84.7 percent (or 66% of all U.S. visitors) made airline reservations. The proportion was 6.5 percentage points higher than the second quarter of 2007 and 16.9 percentage points higher than the second quarter of 2006 (see Figure 26).

**Figure 27: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet - scale expanded]**



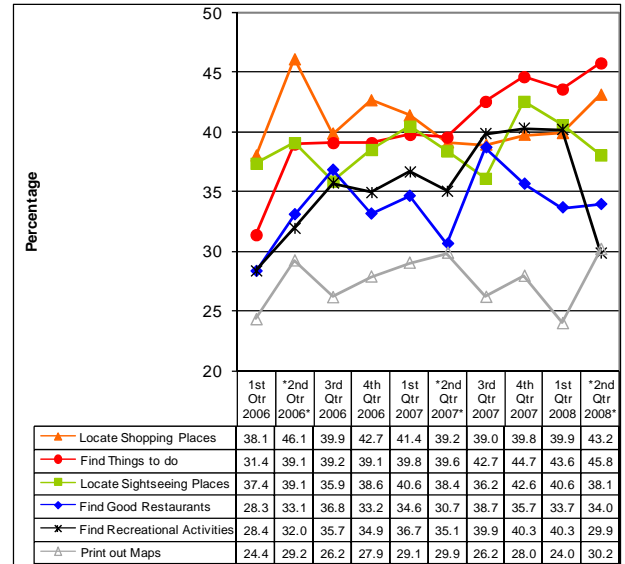
- The proportion of U.S. Internet users in the second quarter of 2008 who printed out maps or found a place to stay through the Internet remained lower than other actions. The proportion of U.S. Internet users who printed out maps (43% or 33.5% of all U.S. visitors) was moderately higher than the second quarter of 2007 (38.8% or 32.6% of all U.S. visitors) (Figure 27).
- At the same time, the percentage of U.S. Internet users who made rental car reservation (59.1% or 46% of all U.S. visitors) through Internet use was 1.3 percentage points higher than the second quarter of 2007 and 7.2 percentage points higher than the second quarter of 2006.
- However, U.S. Internet users were moderately less likely to estimate costs (51.3% or 40% of all U.S. visitors), find things to do (50.3% or 39.2% of all U.S. visitors) or make hotel reservations (48.5% or 37.8% of all U.S. visitors) through the internet than the second quarter of 2007.

**Figure 28: Internet Use – Japan [Percentage of Japanese visitors who used the Internet]**



- Japanese Internet users were mainly interested in finding an accommodation for the second quarter of 2008 (68.5% or 35.5% of all Japanese visitors). Other activities continued to draw less than half of all Japanese Internet users (see Figure 28).

**Figure 29: Internet Use – Japan [Percentage of Japanese visitors who used the Internet - scale expanded]**

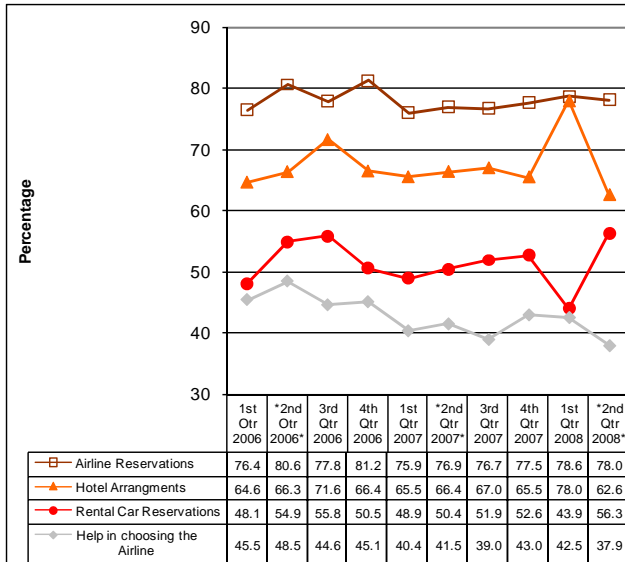


- In the second quarter of 2008, more Japanese Internet users used the internet for finding things to do (45.8% or 23.7% of all Japanese visitors) than the second quarter of 2007 (39.6% or 20.3% of all Japanese visitors) (see Figure 29).
- Compared to the second quarter of 2007, Internet use among Japanese visitors to locate shopping places (43.2% or 22.4% of all Japanese visitors) or find good restaurants (34% or 17.6% of all Japanese visitors) were moderately higher in the second quarter of 2008.
- In the second quarter of 2008, Internet use among Japanese visitors to find recreational activities (29.9% or 15.5% of all Japanese visitors) decreased 5.2 percentage points compared to the second quarter of 2007.

## Travel Agent Use

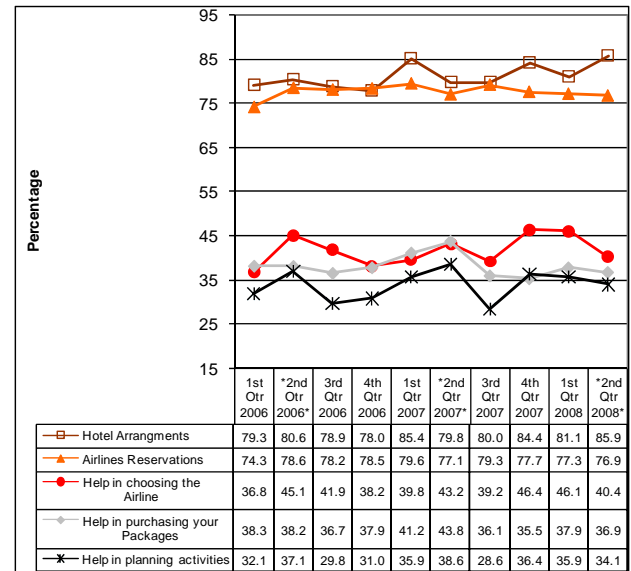
Note that the statistic reported for each travel agent use is the percentage of those who used a travel agent (from Internet and Travel Agent Use).

**Figure 30: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]**



- The use of a travel agent to make rental car reservations (56.3% or 12.3% of all U.S. visitors) in the second quarter of 2008 was 5.9 percentage points higher than the second quarter of 2007 (Figure 30).
- At the same time, the use of a travel agent to make hotel arrangements (62.6% or 13.7% of all U.S. visitors) or choosing an airline (37.9% or 8.3% of all U.S. visitors) was moderately lower than the second quarter of 2007.

**Figure 31: Use of Travel Agent – Japan [Percent of Japanese visitors who used a Travel Agent]**



- The use of travel agents by Japanese visitors was generally to make hotel arrangements (85.9% or 59.5% of all Japanese visitors) or airlines reservations (76.9% or 53.3% of all Japanese visitors). The proportion of Japanese travel agent users that made hotel arrangements improved 6.1 percentage points compared to the second quarter of 2007 (Figure 31).
- Of the 69.3 percent of Japanese visitors who used a travel agent, 36.9 percent (or 25.6% of all Japanese visitors) needed help in purchasing packages, a significant decline compared to 43.8 percent (or 33.7% of all Japanese visitors) in the second quarter of 2007.
- Moderately less Japanese visitors used a travel agent for assistance in choosing the airline (40.4% or 28% of all Japanese visitors) or planning activities (34.1% or 23.6% of all Japanese visitors) than the second quarter of 2007.

## DEFINITION AND SURVEY METHODOLOGY

**Major Market Areas (MMA):** The following are defined by the Hawai'i Tourism Authority as the top five geographical areas for marketing purposes to make the State more globally competitive:

1. U.S. West – Pacific (Alaska, California, Oregon, 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
5. Europe

Survey questionnaires were mailed to selected U.S., Japanese, Canadian and European visitors after they have returned home. The U.S. samples were drawn from the completed Domestic In-Flight Survey forms (Basic Data Series). The Japanese, Canadian, and European samples were drawn from the completed International 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 English version was sent to U.S., Canadian and European visitors. The 2008 survey has 8 pages and 33 questions. To view a sample of our Visitor Satisfaction survey, please refer to our 2007 Visitor Satisfaction & Activities Report.

**Table 1: Sample Size  
April - June 2008**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	3,321	1,137	34.2%	+/- 2.9
U.S.	3,147	910	28.9%	+/- 3.3
Canada Europe	2,925	808	27.6%	+/- 3.4

Due to the low number of samples achieved, data for Lāna'i and Moloka'i were not presented in most of the data tables 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.

This report is available in Adobe Acrobat form on the DBEDT website, <http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>.

For further information about obtaining visitor data and other sources, contact the DBEDT Library at (808) 586-2424, or e-mail [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov) or DBEDT Research & Economic Analysis Division at (808) 586-2466.