

2009

**Visitor Satisfaction
Monitoring Report**

**First Quarter
(January - March)**



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

INTRODUCTION

This monitoring report presents selected preliminary statistics from the 2009 Visitor Satisfaction and Activity survey. The survey measures the opinions of visitors, regarding their satisfaction with Hawai'i as a visitor destination, from four major marketing areas: U.S. West, U.S. East, Japan, and Canada (see Definition and Survey Methodology on page 15). 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 or DBEDT Research & Economic Analysis Division at (808) 586-2466.

CONDITION OF VISITOR INDUSTRY

In the first quarter (January – March) of 2009, there were 1,567,132 visitor arrivals by air to the state, a decrease of 14.9 percent from the same quarter of the previous year. Visitor arrivals from U.S. West with 595,410 (-17.9%), U.S. East with 412,512 (-17.2%), Canada with 127,441 (-10.8%), and Japan with 284,107 (-7%) declined. The average length of stay for all visitors to the state was 9.76 days, a slight increase from 9.69 days in the first quarter of 2008.

In the first quarter of 2009, statewide first-time visitors comprised 67.2 percent of total visitors, similar to 66.9 percent in the first quarter of 2008.

The share of first-time visitors among Japan visitors (44.5%) was unchanged; while the share among U.S. East (37.8%, -1.8 percentage points), Canada (32.6%, -1.5 percentage points), and U.S. West (17.4%, -1.1 percentage points) visitors were slightly lower.

RESULTS

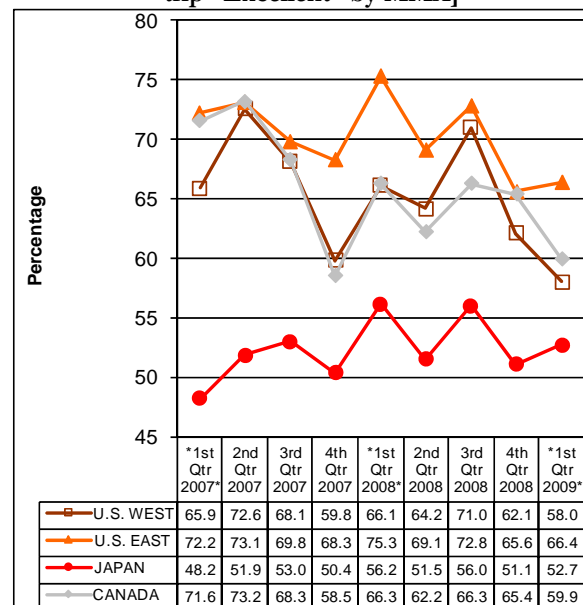
Visitor Satisfaction Ratings

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

In general, more than half of visitors from any major marketing area rated 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 first quarter of 2009, the proportion of U.S. West (58%, -8.1 percentage points), U.S. East (66.4%, -8.9 percentage points), and Canada (59.9%, -6.4 percentage points) visitors who rated their trip to Hawai'i excellent declined compared to the first quarter of 2008. In addition, the proportions decreased among U.S. West (-7.9 percentage points), U.S. East (-5.8 percentage points), and Canada (-11.7 percentage points) visitors compared to the first quarter of 2007 (see Figure 1).
- Over half (52.7%) of Japan visitors rated their trip excellent in the first quarter of 2009, similar to the first quarter of 2008 (56.2%) and an improvement from less than half of Japan visitors in the first quarter of 2007 (48.2%).

Exceeded Expectations

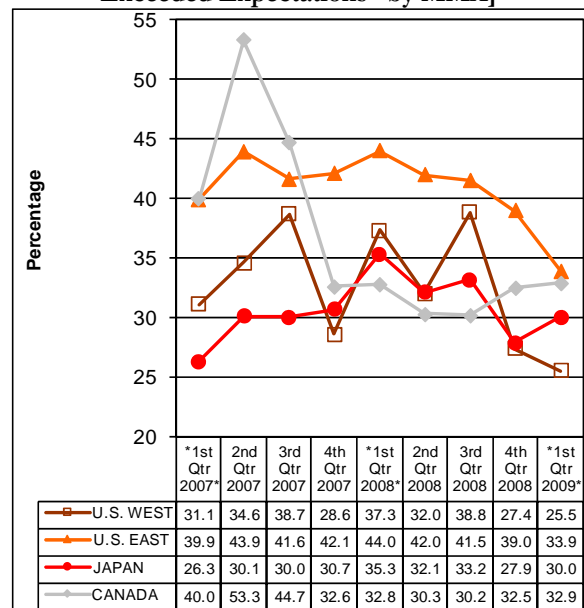
The visitors' evaluation of the trip is influenced not only by the attributes and characteristics of the service but also by the needs, motivations, and interests of the visitors. Therefore, it is important to measure how well the destination was able to provide the experience that was expected. Overall,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

- A quarter (25.5%) of U.S. West visitors said their trip to Hawai'i exceeded expectations in the first quarter of 2009, significantly lower compared to the first quarter of 2007 (31.1%) or 2008 (37.3%).
- U.S. East ratings also declined in the first quarter compared to a year ago. The share of U.S. East visitors who said their trip exceeded expectations (33.9%) decreased by 6 percentage points compared to the first quarter of 2007 and by 10.1 percentage points compared to the first quarter of 2008.
- Japan visitors' rating (30%) decreased 5.3 percentage points compared to the first

quarter of 2008, but improved 3.7 percentage points compared to the first quarter of 2007.

- The proportion of Canada visitors (32.9%) in the first quarter of 2009 was similar to the same period in 2008 (32.8%).

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

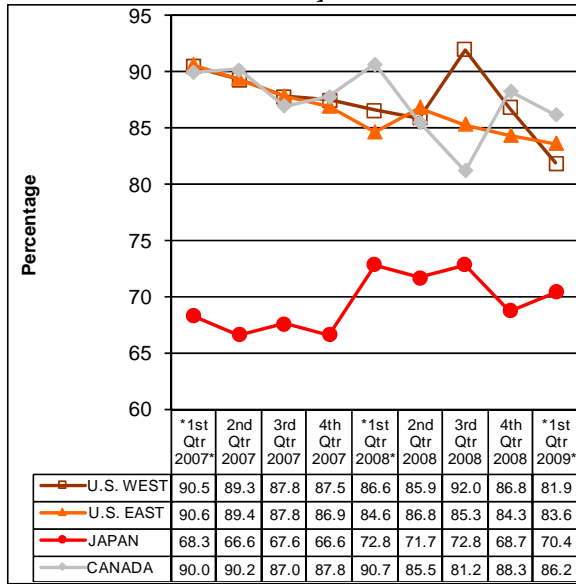


Very Likely to Recommend Hawai'i

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, 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 (see Figure 3).

- The proportion of U.S. West visitors who were very likely to recommend Hawai'i in the first quarter of 2009 (81.9%) was 4.7 percentage points lower compared to the first quarter of 2008 and 8.6 percentage points lower compared to the first quarter of 2007 (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]



- The proportion of U.S. East visitors who were very likely to recommend Hawai'i in the first quarter of 2009 (83.6%) was similar to the same period in 2008 (84.6%).
- The proportion of Japanese (70.4%) and Canada (86.2%) visitors who were very likely to recommend Hawai'i to friends and relatives remained relatively similar to the first quarter 2008 (72.8% and 90.7%, respectively).

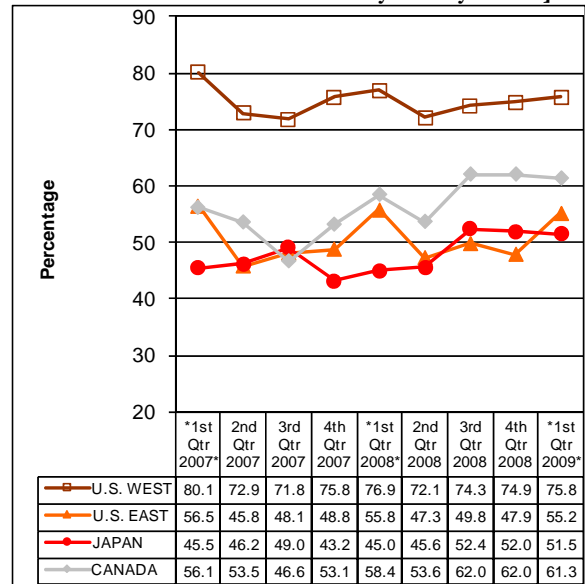
Likelihood to Revisit Hawai'i

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).

- In the first quarter of 2009, the proportion of U.S. West visitors who were very likely to revisit Hawai'i (75.8%) did not change much from the first quarter of 2008 (76.9%).

- Continuously, more than a half (55.2%) of U.S. East visitors said they were very likely to recommend in the first quarter of 2009.
- The share of Japan visitors (51.5%) who said they were very likely to recommend improved 6.5 percentage points compared to the first quarter of 2008 and 6 percentage points compared to the first quarter of 2007.
- Canada visitors (61.3%) were 5.2 percentage points more likely to return compared to the first quarter of 2007.

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]



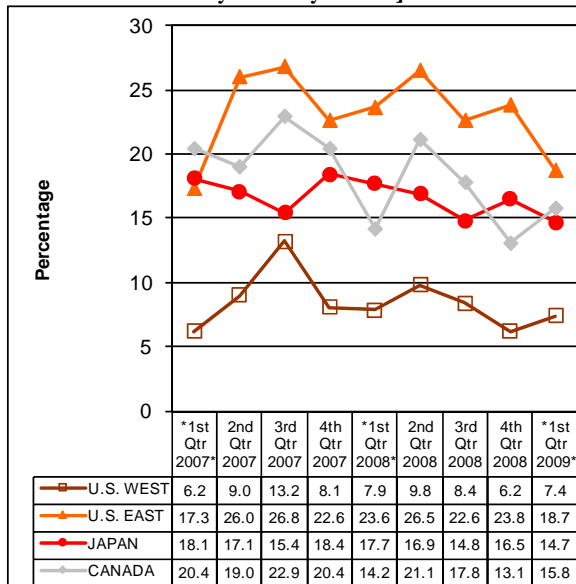
Not Likely to Revisit Hawai'i

The percentage of respondents who answered that they were "Not too likely" or "Not at all likely" to visit Hawai'i in the next five years continued to be fairly low among U.S. West visitors while moderately higher for Japan, Canada, and U.S. East visitors (see Figure 5).

- In the first quarter of 2009, the share of U.S. West (7.4%) and Canada (15.8%) visitors who were not likely to revisit Hawai'i in the next five years was similar to the same quarter in the previous year (7.9% and 14.2%, respectively) (see Figure 5).

- The share of U.S. East (18.7%, -4.9 percentage points) and Japan (14.7%, -3 percentage points) visitors who were not likely to return declined compared to the first quarter of 2008.

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]



Reasons for Not Revisiting Hawai'i

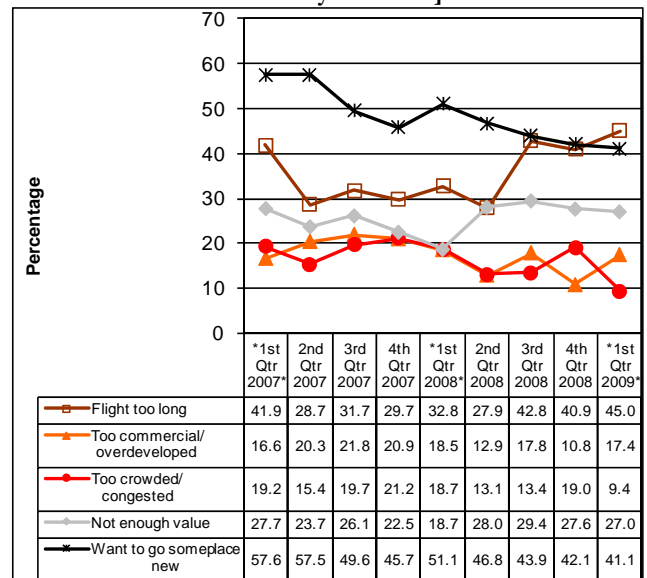
Note that the statistic reported for each reason for not revisiting Hawai'i is the percentage of those who were *Not Likely to Revisit Hawai'i* (from previous section).

- The proportion of U.S. visitors that said the flight was too long in the first quarter of 2009 (45% or 5.7% of all U.S. visitors) was significantly higher compared to the same period in 2008 (32.8% or 4.7% of all U.S. visitors) (Figure 6).
- Since 2007, the share of U.S. visitors that wanted to visit someplace new had been decreasing. In the first quarter of 2009, 41.1 percent of U.S. visitors (5.2% of all U.S. visitors) wanted to visit someplace new, a noticeable decrease compared to 57.6 percent (6.2% of all U.S. visitors) in the first quarter

of 2007 or 51.1 percent (7.3% of all U.S. visitors) in the first quarter of 2008.

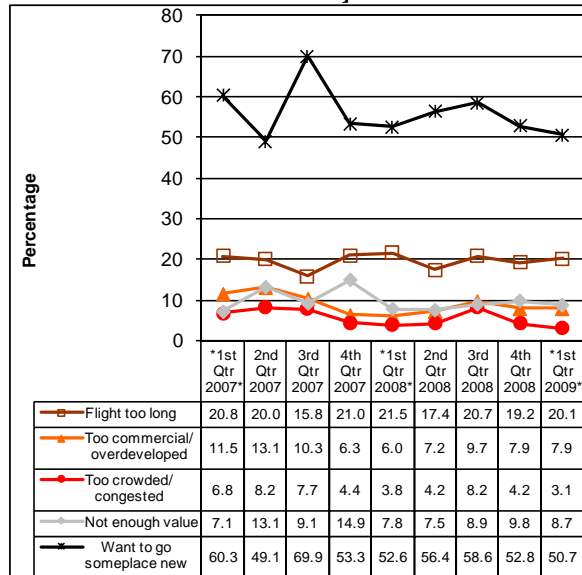
- Among the share of U.S. visitors who were not likely to revisit in the first quarter of 2009, considerably more said that there was not enough value (27% or 3.4% of all U.S. visitors) compared to the first quarter of 2008 (18.7% or 2.7% of all U.S. visitors).
- However, the proportion of U.S. visitors that felt that Hawai'i was too crowded/congested (9.4% or 1.2% of all U.S. visitors) was significantly less compared to the first quarter of 2007 (19.2% or 2.1% of all U.S. visitors) or 2008 (18.7% or 2.7% of all U.S. visitors).

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



- The top reason Japan visitors plan to not revisit Hawai'i is that they want to go someplace new (50.7% or 7.5% of all Japan visitors (see Figure 7).

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

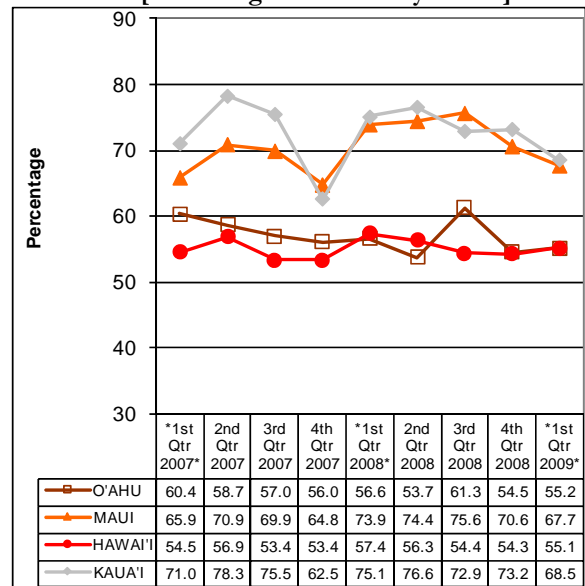


Individual Island Experience

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.

- 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 percentage of U.S. visitors who rated O'ahu (55.2%, -1.4 percentage points) and Hawai'i Island (55.1%, -2.3 percentage points) excellent did not change much compared to the first quarter of 2008.
- In the first quarter of 2009, the proportion of U.S. visitors who rated Maui (67.7%, -6.2 percentage points) and Kaua'i (68.5%, -6.6 percentage points) excellent was lower compared to the first quarter of 2008.

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



- In the first quarter of 2009, Japan visitors had notably lower satisfaction ratings (53%) for the island of O'ahu compared to the first quarter of 2008 (59.8%) (Figure 9).
- Japan visitors rated Maui (49.5%) higher than the first quarter of 2008 (44.4%) but lower than the first quarter of 2007 (61.4%).
- Kaua'i ratings (45.8%) among Japan visitors were considerably lower compared to the first quarter of 2008 (67.1%).

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

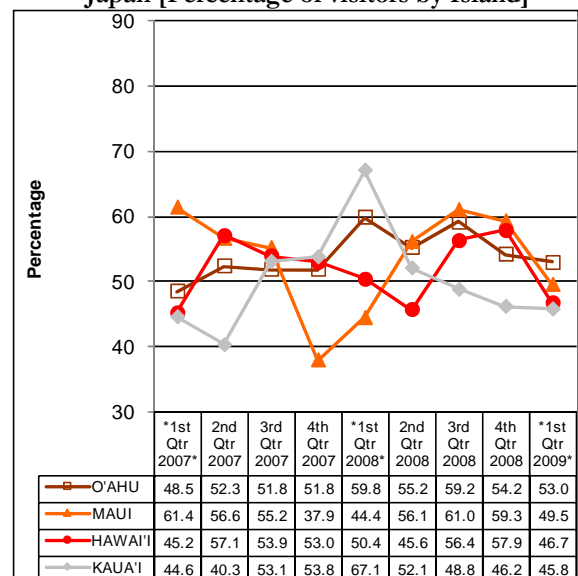
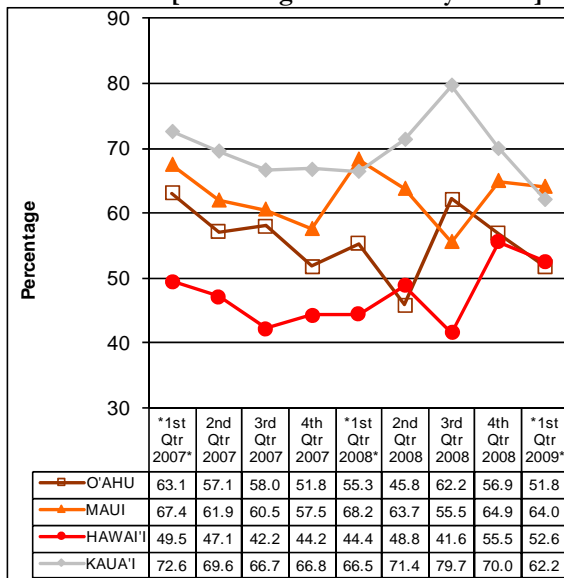


Figure 10: Island Experience Rated as Excellent – Canada [Percentage of visitors by Island]

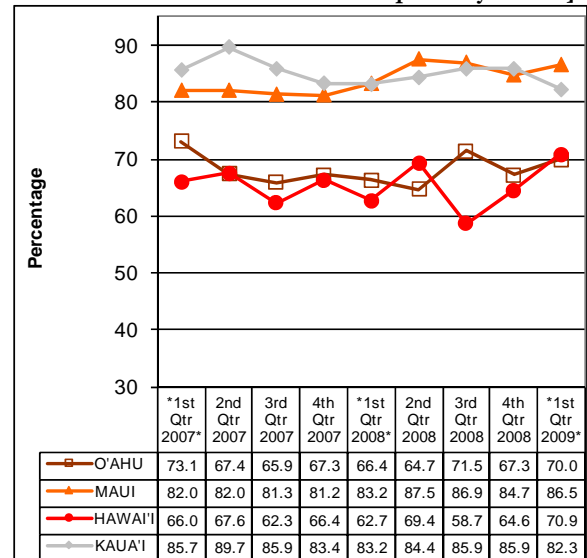


- Canada visitor satisfaction ratings in the first quarter of 2009 declined for O’ahu (51.8%), 3.5 percentage points lower compared to the first quarter of 2008 and 11.3 percentage points lower compared to the first quarter of 2007 (Figure 10).
- The proportion of Canada visitors that rated Maui excellent (64%) was 4.2 percentage points lower compared to the first quarter of 2008.
- Hawai’i Island ratings (52.6%) among Canada visitors noticeably improved 8.2 percentage points compared to the first quarter of 2008.
- Kaua’i ratings (62.2%) among Canada visitors were 4.3 percentage points lower compared the first quarter of 2008 and 10.4 percentage points lower compared to the first quarter of 2007.

Individual Island Recommendation

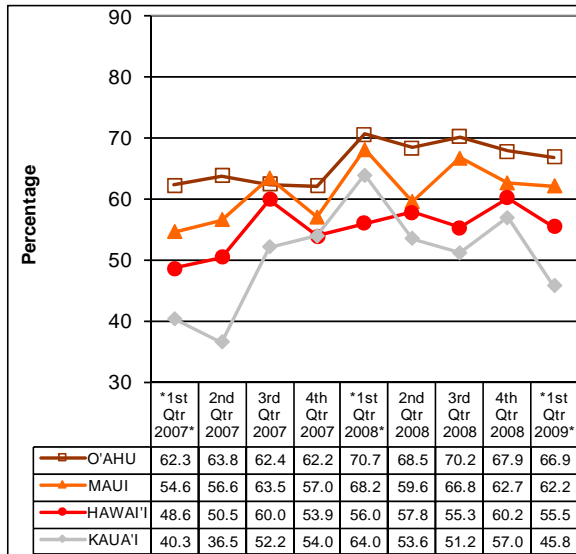
Again, when visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family.

Figure 11: Very Likely to Recommend Island – U.S. [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



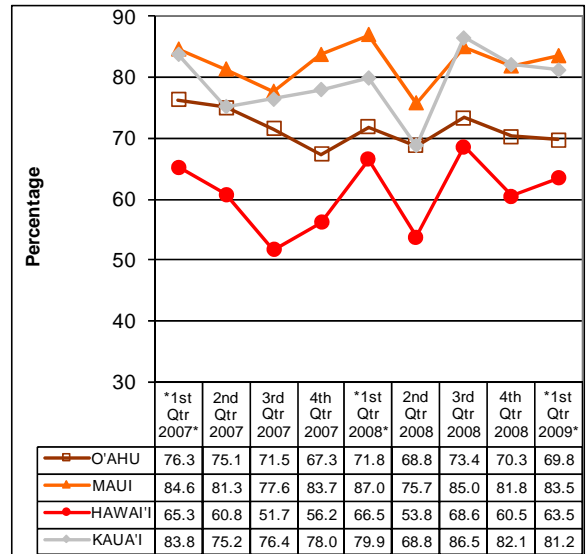
- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui and Kaua’i over O’ahu and Hawai’i Island (see Figure 11).
- In the first quarter of 2009, the percentage of U.S. visitors who were very likely to recommend O’ahu (70%) showed some improvement over the first quarter of the previous year (66.4%).
- Reasonably more U.S. visitors were very likely to recommend Maui (86.5%) compared to the first quarter of 2007 (82%) or 2008 (83.2%).
- U.S. visitors ratings for Hawai’i Island (70.9%) considerably improved over the first quarter of 2007 (66%) or 2008 (62.7%).
- Kaua’i ratings (82.3%) among U.S. visitors were similar to the first quarter of 2008 (83.2%).

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



- Japan visitors continue to be more likely to recommend O’ahu over the other islands. Maui at 62.2 percent was only slightly behind O’ahu in the first quarter of 2009 (Figure 12).
- Noticeably fewer Japan visitors in the first quarter of 2009 were very likely to recommend Maui (62.2%, -6 percentage points) and Kaua’i (45.8%, -18.2 percentage points) compared to the first quarter of 2008. However, there were more Japan visitors who were very likely to recommend Maui (+7.6 percentage points) and Kaua’i (+5.5 percentage points) compared to the first quarter of 2007.

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

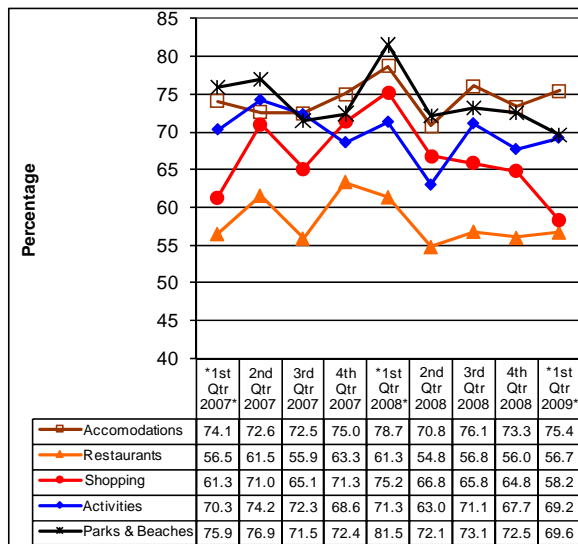


- Since the third quarter of 2008, Canada visitors were more likely to recommend Maui and Kaua’i over O’ahu and Hawai’i Island (Figure 13).
- Canada visitor ratings for O’ahu in the first quarter of 2009 (69.8%) was 2 percentage points lower compared to the same quarter of the 2008 but 6.5 percentage points lower compared to the same quarter of 2007.

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.

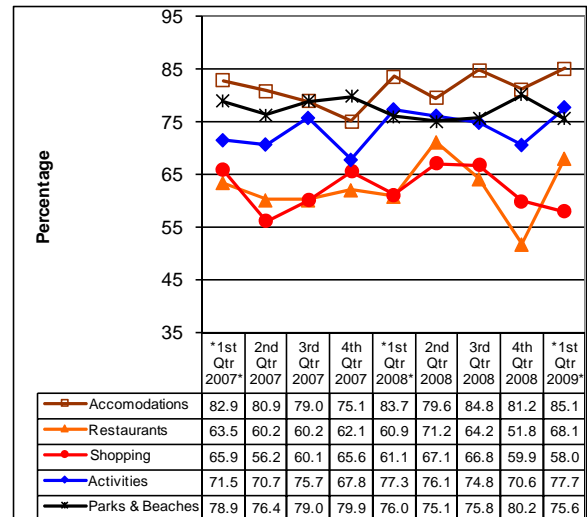
Figure 14: Detailed Satisfaction Ratings for U.S. Visitors to O'ahu [Percentage of U.S. visitors to O'ahu who were "Very Satisfied" with Attribute]



- In the first quarter of 2009, accommodations on O'ahu were the highest rated attribute among U.S. visitors (75.4%) (Figure 14).
- The share 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.
- In the first quarter of 2009, the percentage of U.S. visitors who enjoyed O'ahu's shopping (58.2%) was significantly lower compared to the first quarter of 2008 (75.2%). Notably fewer U.S. visitors were very satisfied with the locations (-14.7 percentage points), variety of merchandise (-13.7 percentage points), sufficient number of shopping places (-12.6 percentage points), quality of merchandise

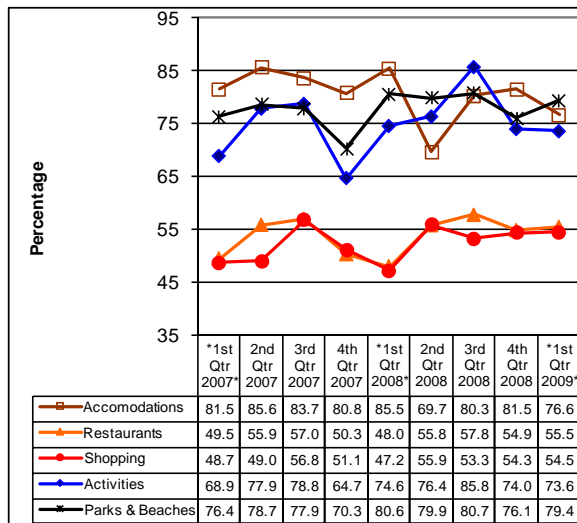
(-11.3 percentage points), and service (-10 percentage points).

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



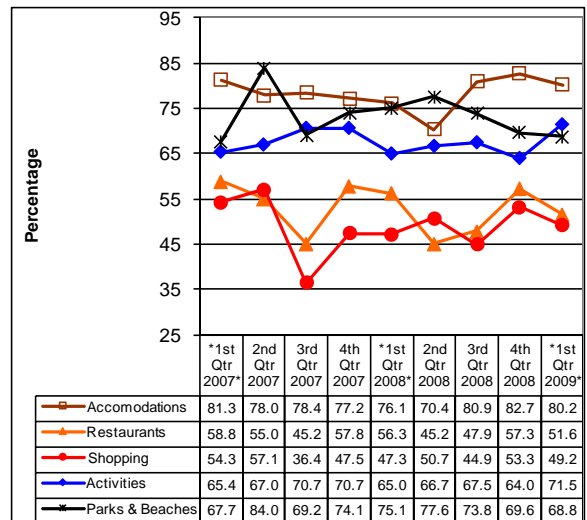
- Among U.S. visitors, accommodations (85.1%) on Maui were the highest rated attribute on the island in the first quarter of 2009, followed by activities (77.7%) and parks and beaches (75.6%) (Figure 15).
- Shopping (58%) was the lowest rated attribute on Maui in the first quarter of 2009. Significantly fewer were very satisfied with the value for their money (-9.7 percentage points) compared to the first quarter of 2008.

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



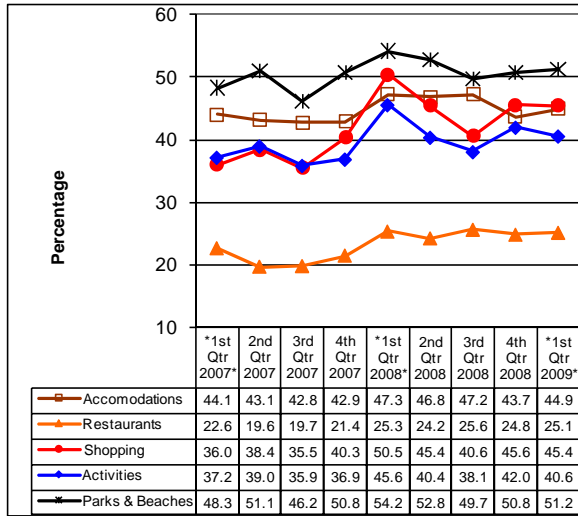
- U.S. visitors tended to be more satisfied with Kaua'i's accommodations, activities, and parks and beaches. The island's restaurants and shopping ratings were much lower compared to other attributes. In the first quarter of 2009, parks and beaches on Kaua'i (79.4%) was the highest rated attribute. (Figure 16).
- Kaua'i's accommodations (76.6%) was ranked the second highest rated attribute in the first quarter of 2009 given that satisfaction ratings among U.S. visitors significantly declined compared to the first quarter of 2008 (85.5%). Considerably fewer U.S. visitors (-6.7 percentage points) were satisfied with the locations.
- Restaurant ratings (55.5%) among U.S. visitors on Kaua'i were noticeably higher compared to the first quarter of 2007 (49.5%) or 2008 (48%). Restaurant satisfaction levels were distinctively higher for the variety of choices compared to the first quarter of 2007 (+6.3 percentage points) or 2008 (+8 percentage points).
- Over half (54.5%) of U.S. visitors to Kaua'i were very satisfied with the shopping compared to less than half in the first quarter of 2007 (48.7%) or 2008 (47.2%).

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



- Hawai'i Island's accommodations continued to be the highest rated attribute among U.S. visitors in the first quarter of 2009 (80.2%). The rating was 4.1 percentage points higher compared to the same quarter of 2008 (Figure 17).
- In the first quarter of 2009, activities on Hawai'i Island among U.S. visitors was the second highest rated attribute (71.5%) due to a significant increase over the first quarter of 2007 (65.4%) or 2008 (65%). U.S. visitors had notably higher satisfaction levels with the service compared to the first quarter of 2007 (+5.6 percentage points) or 2008 (+15.3 percentage points).
- Parks and beaches on Hawai'i Island also scored high in satisfaction among U.S. visitors in the first quarter of 2009 (68.8%). However, the proportion of U.S. visitors who were very satisfied with the parks and beaches decreased 6.3 percentage points compared to the first quarter of 2008.
- The proportion of U.S. visitors who enjoyed Hawai'i Islands restaurants (51.6%) was 4.7 percentage points lower compared to the first quarter of 2008 and 7.2 percentage points lower compared to the first quarter of 2007.

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

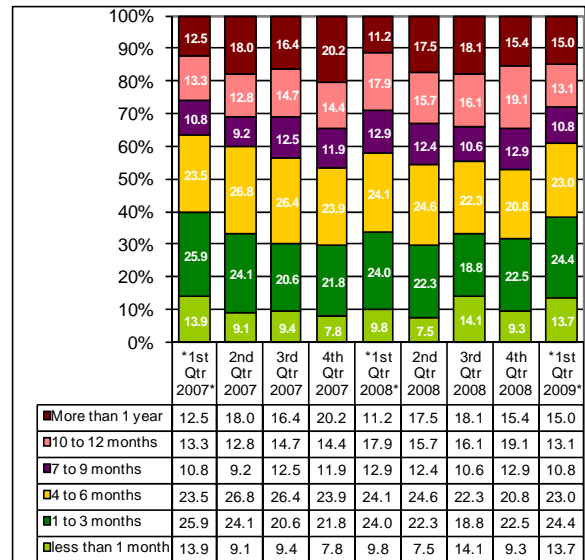


- O’ahu’s parks and beaches (51.2%) continued to be the highest rated attribute among Japan visitors (Figure 18).
- Japan visitor ratings regarding O’ahu’s shopping in the first quarter of 2009 (45.4%) declined 5.1 percentage points compared to the first quarter of 2008 but increased 9.4 percentage points compared to the first quarter of 2007. There were large decreases in satisfaction ratings for the sufficient number of shopping places (-6.5 percentage points) and variety of merchandise (-5.1 percentage points) compared to the first quarter of 2008. However compared to the first quarter of 2007, there were large increases in satisfaction ratings for the locations (+8.7 percentage points), value for their money (+8.7 percentage points), quality of merchandise (+5.8 percentage points), and variety of merchandise (+5.5 percentage points).
- A quarter (25.1%) of Japan visitors in the first quarter of 2009, were very satisfied with Restaurants on O’ahu. Restaurants continue to be the lowest rated attribute among Japan visitors to O’ahu.

Trip Planning Cycle

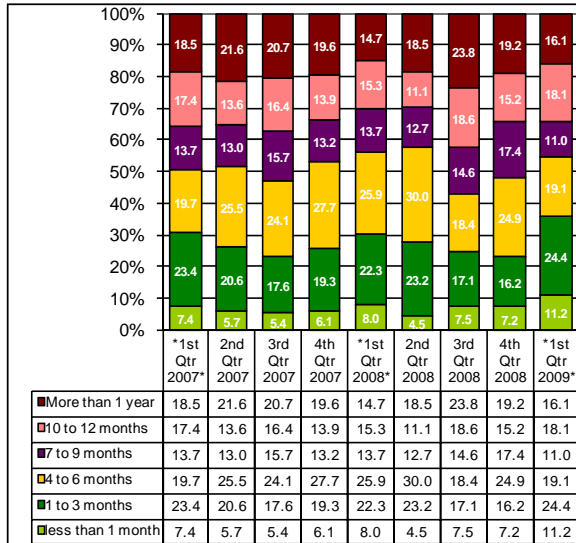
Information on how visitors plan their trips and when they make major decisions can greatly enhance preparation of effective marketing and promotion plans.

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



- The majority of U.S. West visitors tend to make decisions four months or more before arriving.
- In the first quarter of 2009, significantly fewer U.S. West visitors made their decision to visit Hawai’i four to twelve months in advance of departure (46.9%) compared to the first quarter of the previous year (54.9%) (Figure 19).
- U.S. West visitors were notably more likely to make airline reservations (61.1%, +9.1 percentage points), purchase tickets (61.8%, +9 percentage points), make accommodation reservations (56.2%, +10 percentage points) and, reserve a rental car (76.8%, +12.4 percentage points) three months or less before departure compared to the first quarter of 2008.

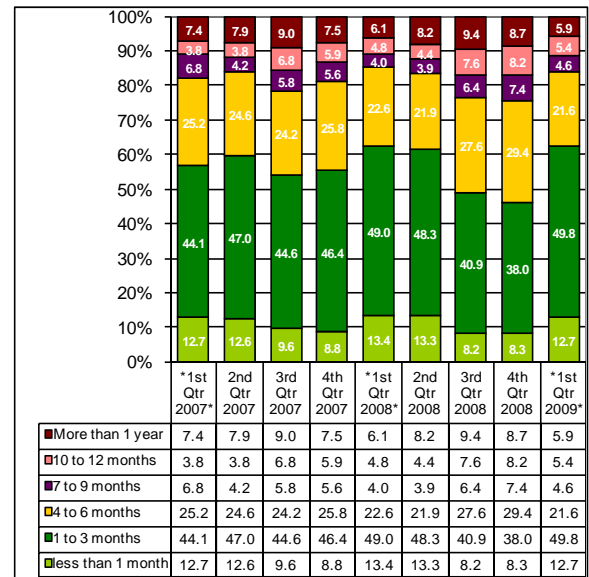
• **Figure 20: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]**



- U.S. East visitors tend to start earlier in making their decisions compared to their U.S. West counterparts. The majority of U.S. East visitors tend to make their decisions seven months or more before their departure.
- In the first quarter of 2009, more U.S. East visitors were likely to make decisions three months or less before departure. The percentage of U.S. visitors who decided on Hawai'i as their vacation destination three months or less (35.6%) substantially increased compared to the first quarter of 2008 (30.3%) (Figure 20).
- At the same time, the share of U.S. East visitors who decided on Hawai'i four to nine months (30.1%) decreased 9.5 percentage points compared to the first quarter of 2008.
- The share of U.S. East visitors who made airline reservations and less than one months before departure (16.1%) was significantly higher compared to the first quarter of 2008 (9.8%). However, the share of U.S. East visitors who made airline reservations one to six months (55.7%) significantly declined compared to the first quarter of 2007 (63.4%) or 2008 (66%).

- In the first quarter of 2009, U.S. East visitors were distinctively more likely to purchase tickets less than one month (16.9%) compared to the first quarter of 2008 (10.7%), while distinctively fewer were likely to purchase tickets one to six months (55.8%) compared to the first quarter of 2007 (63.7%) or 2008 (66.9%).

Figure 21: When Did Japan Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of Japan visitors]

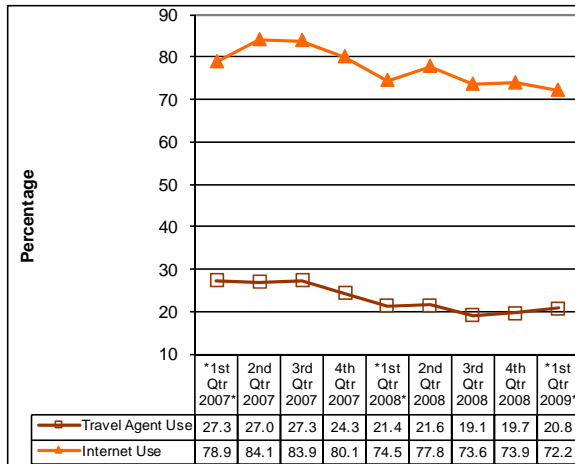


- In the first quarter of 2009, the proportion of Japan visitors who decided to visit Hawai'i three months or less (62.5%) before departure was similar to the first quarter of 2008 (62.4%) but higher than the first quarter of 2007 (56.8%) (Figure 21).

Internet and Travel Agent Use

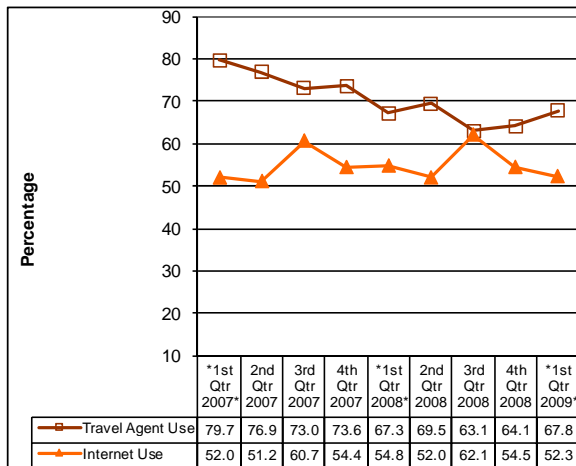
The use of the Internet or a travel agent for trip planning and booking differs quite appreciably between U.S. and Japanese travelers to Hawai'i.

Figure 22: Internet and Travel Agent Use -- U.S.
[Percentage of U.S. visitors]



- The percentage of travel agent and Internet users for trip planning among U.S. visitors were similar to 2008 levels (Figure 22).

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



- Japanese travel agent users were more prevalent than Internet users. In the first quarter of 2009, travel agent users made up 67.8 percent of all Japan visitors. The proportion of travel agent users was similar to 67.3 percent of total Japan visitors in the first quarter of 2008 but decreased

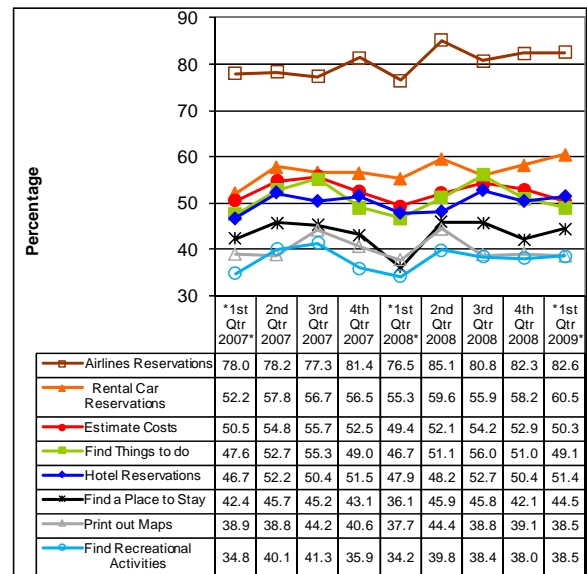
distinctively compared to 79.7 percent in the first quarter of 2007 (Figure 23).

- Internet usage was at 52.3 percent of Japan visitors in the first quarter of 2009. Internet use for the first quarter of 2009 was reasonably lower compared to the same quarter of 2008 (54.8%) but similar to the same quarter in 2007 (52%).

Internet Use

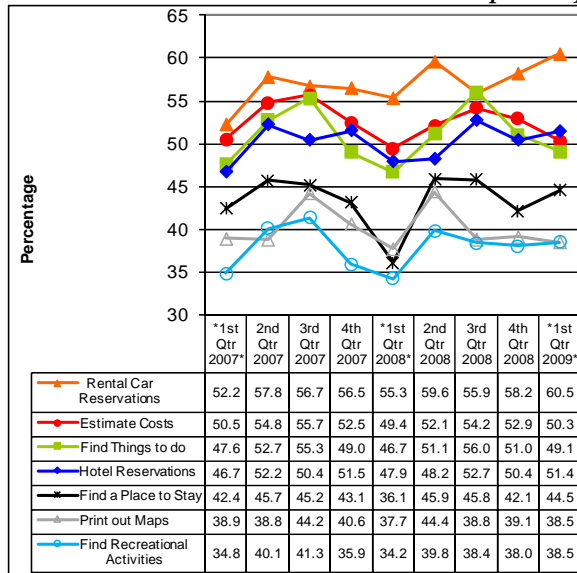
Note that the statistic reported for each Internet use is the percentage of those who used the Internet (from previous section).

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



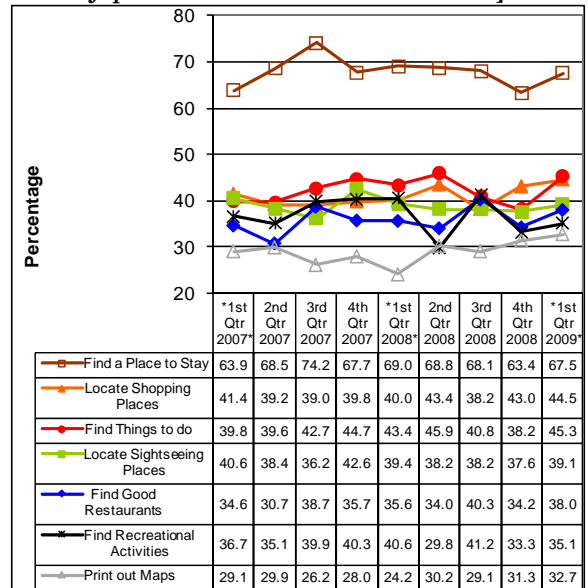
- Of the 72.2 percent of U.S. visitors who used the Internet in the first quarter of 2009, 82.6 percent (59.6% of all U.S. visitors) made airline reservations. Considerably more U.S. visitors used the Internet to make airline reservations compared to the first quarter of 2008 (76.5% or 57% of all U.S. visitors) (Figure 24).

Figure 25: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet - scale expanded]



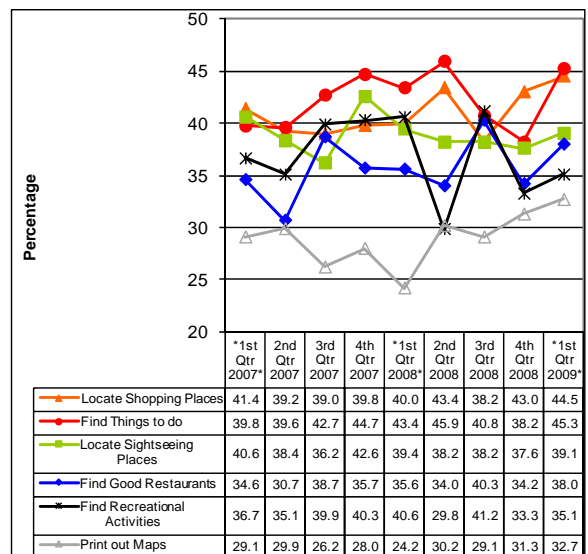
- Besides airline reservations, the share of U.S. Internet users who made rental car reservations continued to be higher than other uses since the beginning of 2007. In the first quarter of 2009, the proportion (60.5% or 43.7% of all U.S. visitors) was moderately higher than the first quarter of 2008 (55.3% or 41.2% of all U.S. visitors) but significantly higher than the first quarter of 2007 (52.2% or 41.2% of all U.S. visitors) (Figure 25).
- There were significantly more U.S. visitors who used the Internet to find a place to stay (44.5% or 32.1% of all U.S. visitors) in the first quarter of 2009 compared to the first quarter of the previous year (36.1% or 26.9% of all U.S. visitors).
- The share of U.S. Internet users who printed out maps or found recreational activities remained lower than other uses.

Figure 26: Internet Use – Japan [Percentage of Japan visitors who used the Internet]



- Japanese Internet users were mainly interested in finding an accommodation. For the first quarter of 2009, they comprised 67.5 percent of Japanese Internet users (35.3% of all Japan visitors), slightly fewer compared to the first quarter of the previous year (69% or 37.8% of all Japan visitors) (Figure 26).
- Other activities continued to draw less than half of all Japanese Internet users.

Figure 27: Internet Use – Japan [Percentage of Japan visitors who used the Internet - scale expanded]

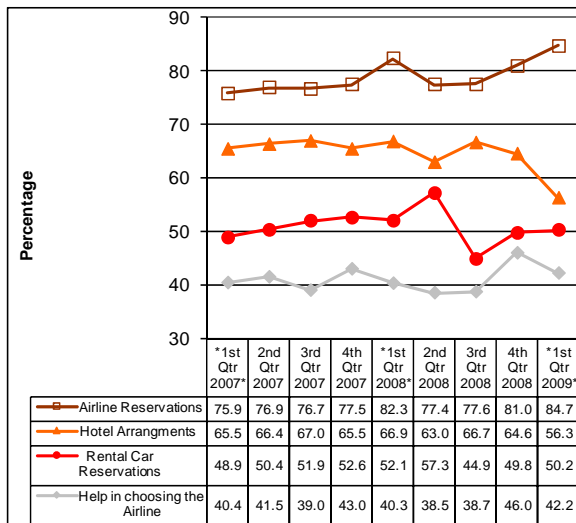


- In the first quarter of 2009, Internet use among Japan visitors to find recreational activities (35.1% or 18.4% of all Japan visitors) significantly declined compared to the same quarter of the previous year (40.6% or 22.2% of all Japan visitors) (Figure 27).
- The proportion of Japanese Internet users who printed out maps was still the lowest usage but exhibited an increasing trend since the first quarter of 2008. In the first quarter of 2009, the proportion (32.7% or 17.1% of all Japan visitors) increased compared to the first quarter of 2008 (24.2% or 13.3% of all Japan visitors).

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

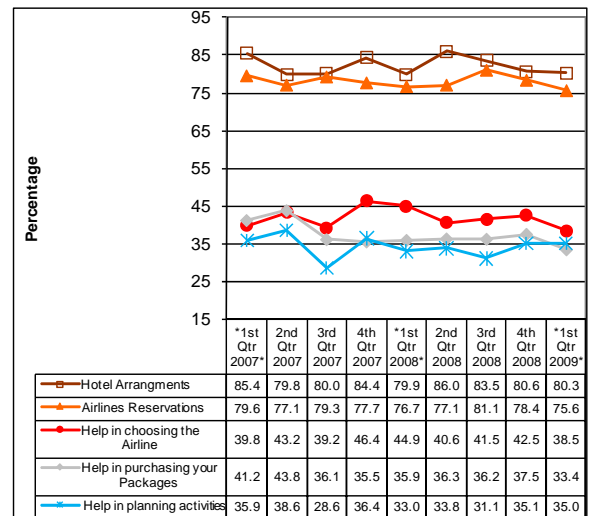


- The use of travel agent among U.S. visitors was mainly to make airline reservations. Of the 20.8 percent of U.S. visitors who used a travel agent in the first quarter of 2009, 84.7 percent (17.6% of all U.S. visitors) made airline reservations. The proportion rose 2.4 percentage points over the first quarter of

2008 and 8.8 percentage points over the first quarter of 2007 (Figure 28).

- U.S. visitors who used a travel agent for assistance in hotel arrangements (56.3% or 11.7% of all U.S. visitors) was distinctively lower compared to the first quarter of 2007 (65.5% or 17.9% of all U.S. visitors) or 2008 (66.9% or 14.3% of all U.S. visitors).

Figure 29: Use of Travel Agent – Japan [Percent of Japan visitors who used a Travel Agent]



- The use of travel agents by Japan visitors was generally to make hotel arrangements (80.3% or 54.4% of all Japan visitors) or airline reservations (75.6% or 51.2% of all Japan visitors) (Figure 29).
- Significantly fewer Japan visitors used a travel agent for assistance in choosing an airline (38.5% or 26.1% of all Japan visitors) compared to the first quarter of 2008 (44.9% or 30.2% of all Japan visitors).
- The share of Japan visitors who used a travel agent for assistance in purchasing packages (33.4% or 22.6% of all Japan visitors) was only 2.5 percentage point lower compared to the first quarter of 2008, yet 7.8 percentage points lower compared to the first 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., Japan, Canada, and Europe visitors after they have returned home. U.S. samples were drawn from the completed Domestic In-Flight Survey forms (Basic Data Series). Japan, Canada, and Europe 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., Canada, and Europe visitors. The 2009 survey has 8 pages and 33 questions.

**Table 1: Sample Size
January - March 2009**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	4,155	1,659	39.9%	+/- 2.4
U.S.	4,385	1,391	31.7%	+/- 2.6
Canada	4,885	1,573	32.2%	+/- 2.5

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 or DBEDT Research & Economic Analysis Division at (808) 586-2466.