

2009

# Visitor Satisfaction Monitoring Report

Second Quarter  
(April – May)



TOURISM AUTHORITY

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## 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). 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 Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email [info@hawaiiourismauthority.org](mailto:info@hawaiiourismauthority.org).

## CONDITION OF VISITOR INDUSTRY

In the second quarter (April – June) of 2009, there were 1,594,741 visitors who arrived by air to the state, a decline of 4.4 percent from the same quarter of the previous year. Visitor arrivals from U.S. West with 731,768 (+2.4%) increased while visitor arrivals from Japan with 224,917 (-15.5%), U.S. East with 415,079 (-6.4%), and Canada with 62,205 (-5.2%) decreased. The average length of stay for all visitors to the state was 9.30 days, an increase from 9.08 days in the second quarter of 2008.

In the second quarter of 2009, statewide first-time visitors comprised 35.3 percent of total visitors, slightly less than 37.3 percent in the second quarter of 2009. The share of first-time visitors

among U.S. West visitors (20.5%, -0.5 percentage points) was virtually unchanged while the share among Japan (43.9%, -2.6 percentage points), Canada (44.4%, -2.1 percentage points), and U.S. East visitors (46.4%, -1.5 percentage points) were slightly lower.

In the first six months of 2009, total visitors arrived by air declined (-9.9%) to 3,161,873 compared to the first six months of 2008. The decline was caused by slowed visitor arrivals from U.S. East (-12.1%), Japan (-11%), Canada (-9%), and U.S. West (-7.8%). The combined length of stay was slightly longer at 9.53 days compared to 9.40 days in the first six months of 2008.

In first six months of 2009, statewide first-time visitors comprised 34.1 percent of total visitors, similar to 35.1 percent in the first six months of 2008. The share of first-time visitors among U.S. West visitors (19.1%, -0.7 percentage points) was virtually unchanged while the share among Canada (36.5%, -1.6 percentage points), U.S. East (42.1%, -1.4 percentage points), and Japan visitors (44.2%, -1.2 percentage points) were slightly lower.

## RESULTS

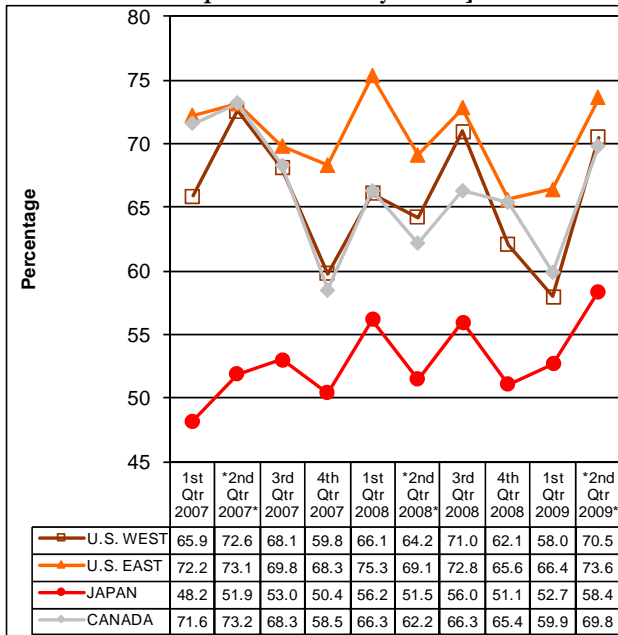
### Visitor Satisfaction Ratings

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]

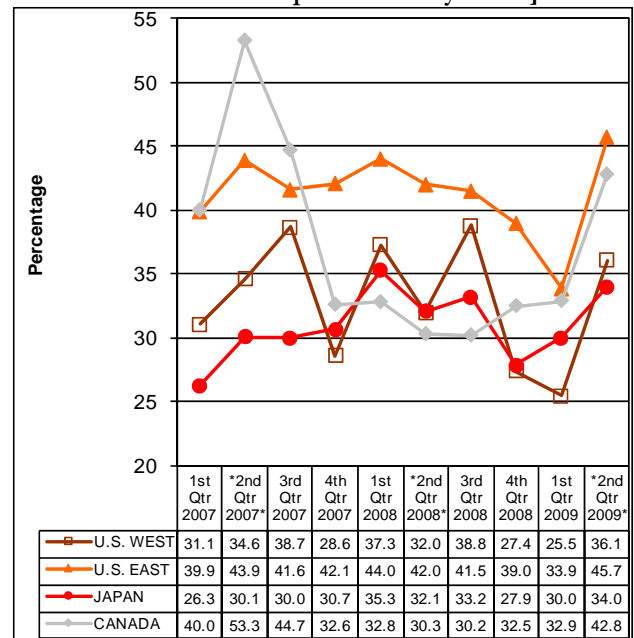


- In the second quarter of 2009, the share of U.S. West (70.5%, +6.3 percentage points), U.S. East (73.6%, +4.5 percentage points), and Canada visitors (69.8%, +7.6 percentage points) who rated their trip to Hawai'i excellent increased compared to the second quarter of 2008.
- Japan visitor ratings in the second quarter of 2009 (58.4%) improved 6.5 percentage points over the second quarter of 2007 and 6.9 percentage points over the second quarter of 2008.

## 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]

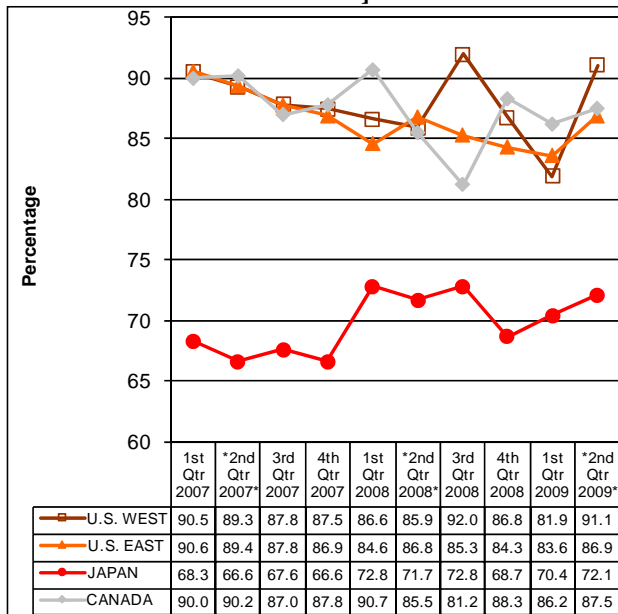


- In the second quarter of 2009, the proportion of U.S. West (36.1%, +4.1 percentage points) and U.S. East visitors (45.7%, +3.7 percentage points) who said their recent trip to Hawai'i exceeded expectations was higher compared to the second quarter of the previous year.
- The share of Japan visitors who said that their trip exceeded expectations (34%) was similar to the second quarter of 2008 (32.1%).
- Canada visitor ratings (42.8%) were 12.5 percentage points higher compared to the second quarter of 2008 but 10.5 percentage points lower compared to the second quarter of 2007.

## 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).

**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]

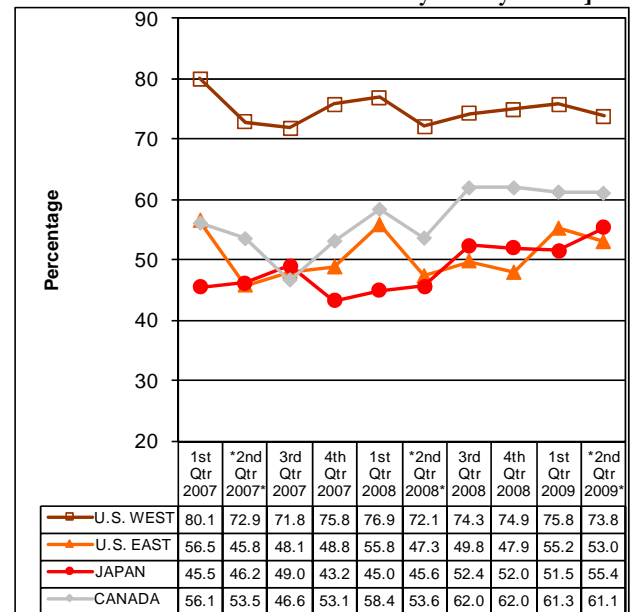


- More U.S. West (91.1%, +5.2 percentage points) and Canada visitors (87.5%, +2 percentage points) who visited Hawai‘i in the second quarter of 2009 were very likely to recommend Hawai‘i to friends and relatives compared to the second quarter of 2008.
- The percentage of U.S. East (86.9%) and Japan visitors (72.1%) who were very likely to recommend Hawai‘i was similar to the second quarter of 2008.

## 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]

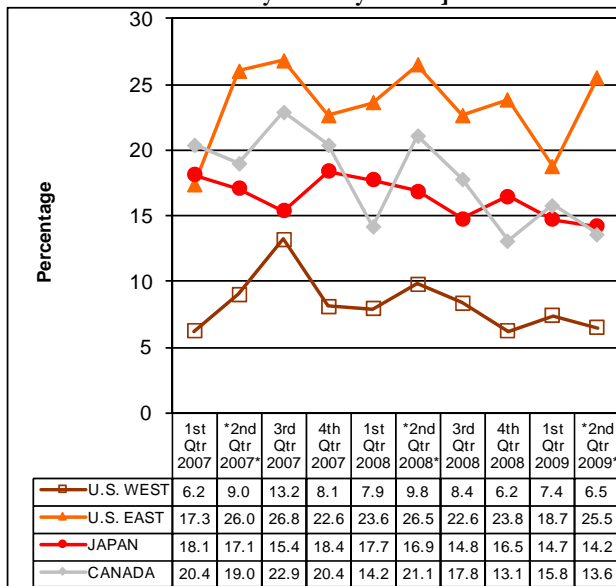


- In the second quarter of 2009, the share of U.S. West visitors who were very likely to revisit Hawai‘i in the next five years (73.8%) was similar to the second quarter of 2007 (72.9%) or 2008 (72.1%).
- More U.S. East (53%, +5.7 percentage points), Japan (55.4%, +9.8 percentage points), and Canada visitors (61.1%, +7.5 percentage points) were very likely to revisit compared to the second quarter of 2008.

## 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).

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

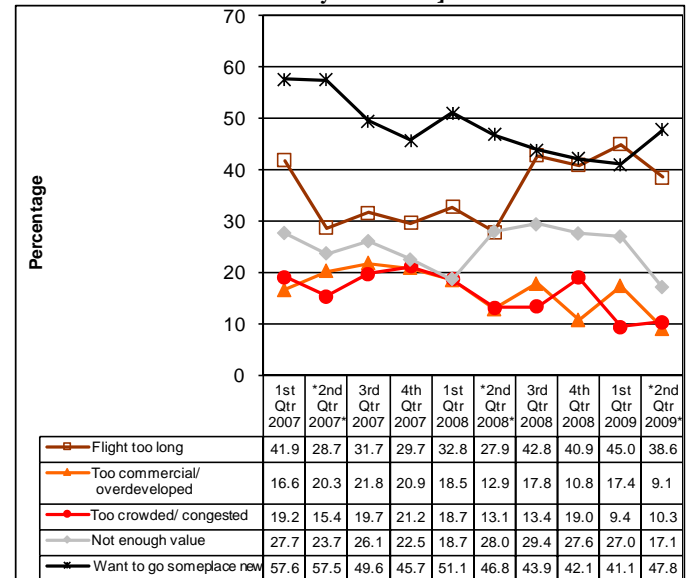


- In the second quarter of 2009, the percentage of U.S. West (6.5%, -3.3 percentage points), Japan (14.2%, -2.7 percentage points), and Canada visitors (13.6%, -7.6 percentage points) who were not likely to revisit was lower compared to the second quarter of 2008. In addition, the percentage of U.S. West (-2.5 percentage points), Japan (-2.9 percentage points), and Canada visitors (-5.4 percentage points) was lower compared to the second quarter of 2007.
- A quarter (25.5%) of U.S. East visitors were not likely to revisit Hawai'i in the next five years. The proportion was similar to the second quarter of 2007 (26%) or 2008 (26.5%).

## 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).

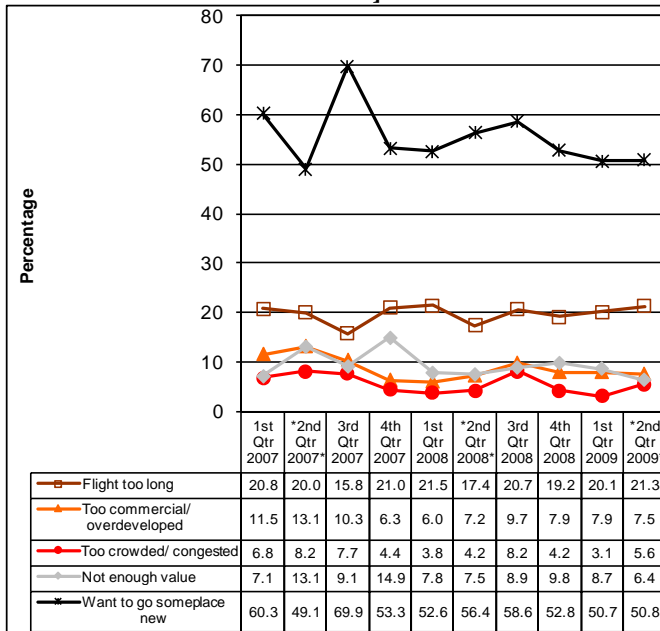
**Figure 6: Reasons for Not Revisiting Hawai'i - U.S.** [Percentage of visitors who were not likely to revisit]



- More than two out of five U.S. visitors were not likely to revisit Hawai'i because they want to visit someplace new (47.8%). The proportion in the second quarter of 2009 was similar compared to the second quarter of 2008 (46.8%) but significantly lower compared to the second quarter of 2007 (57.5%) (Figure 6).
- The share of U.S. visitors who said that the flight was too long (38.6%) increased 9.9 percentage points compared to the second quarter of 2007 and 10.7 percentage points compared to the second quarter of 2008.
- Significantly fewer U.S. visitors said that Hawai'i did not provide enough value (17.1%) compared to the second quarter of 2007 (23.7%) or 2008 (28%).



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



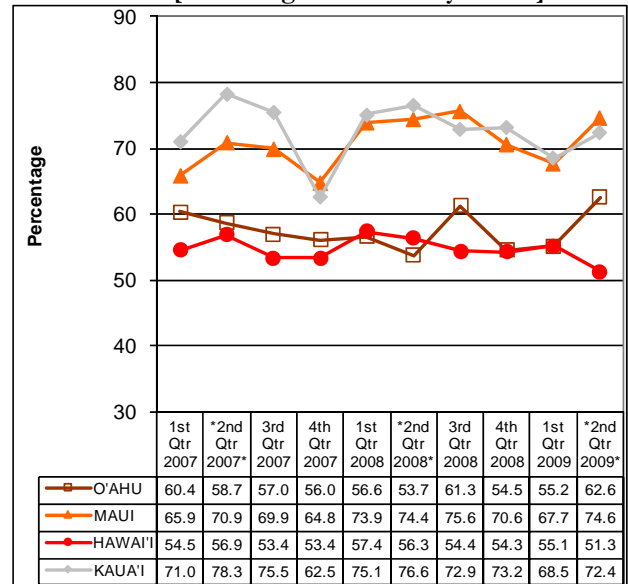
- In the second quarter of 2009, half (50.8%) of Japan visitors said that they want to visit someplace new. The proportion was 5.6 percentage points lower compared to the second quarter of 2008 (Figure 7).

### 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.

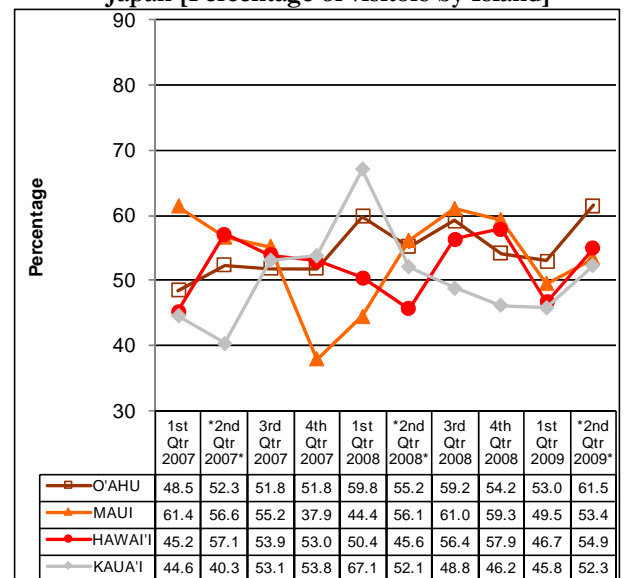
- U.S. visitors to Maui or Kaua'i were more likely to say they had an excellent experience than U.S. visitors to O'ahu or Hawai'i Island (see Figure 8).
- In the second quarter of 2009, the share of U.S. visitors who rated O'ahu excellent (62.6%) increased 8.9 percentage points compared to the same quarter in 2008.
- In the second quarter of 2009, U.S. visitors rated Maui (74.6%) similar to the second quarter of 2008 (74.4%).

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



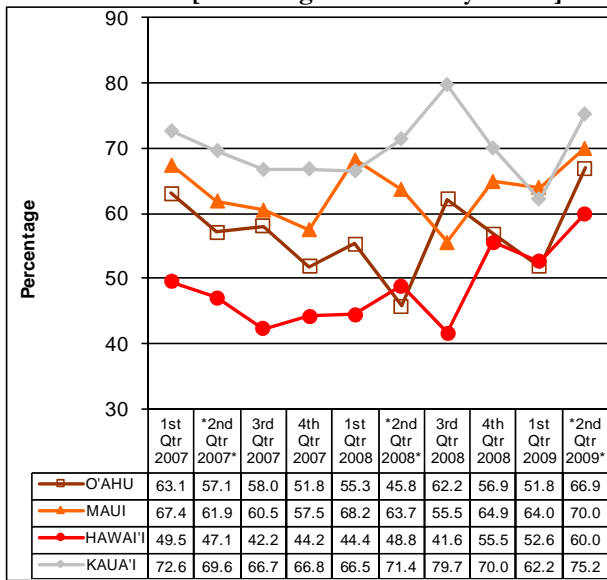
- U.S. visitor ratings were lower for Hawai'i Island (51.3%, -5 percentage points) and Kaua'i (72.4%, -4.2 percentage points) compared to the second quarter of 2008. Furthermore, ratings were lower for Hawai'i Island (-5.6 percentage points) and Kaua'i (-5.9 percentage points) compared to the second quarter of 2007 (see Figure 8).

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



- In the second quarter of 2009, three out of five (61.5%) Japan visitors rated O’ahu excellent. The proportion was 6.3 percentage points higher compared to the second quarter of 2008 and 9.2 percentage points higher compared to the second quarter of 2007 (Figure 9).
- Japan visitors rated Maui (53.4%) 2.7 percentage points lower compared to the second quarter of 2008.
- More than half (54.9%) of Japan visitors rated Hawai’i Island excellent in the second quarter of 2009 compared to less than half in the second quarter of 2008 (45.6%).
- Kaua’i ratings (52.3%) among Japan visitors were similar to the second quarter of 2008 (52.1%).

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



- Canada visitor satisfaction ratings in the second quarter of 2009 significantly improved for O’ahu (66.9%) and Hawai’i Island (60%) compared to the second quarter of 2007 (57.1% and 47.1%, respectively) or 2008 (45.8% and 48.8%, respectively) (Figure 10).
- Maui (70%) and Kaua’i (75.2%) visitor satisfaction ratings showed moderate improvements compared to the second

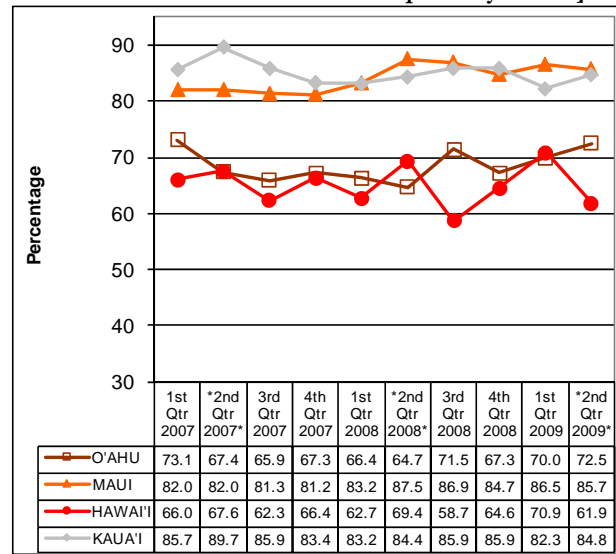
quarter of 2007 (61.9% and 69.6%, respectively) or 2008 (63.7% and 71.4%, respectively).

- Since the third quarter of 2008, Maui satisfaction ratings continued to improve.

### 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.

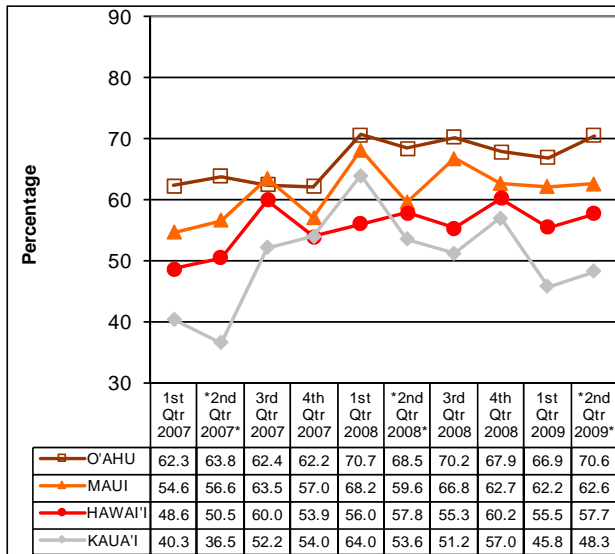
**Figure 11: Very Likely to Recommend Island – U.S. [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**



- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui or Kaua’i over O’ahu or Hawai’i Island (see Figure 11).
- In the second quarter of 2009, the percentage of U.S. visitors who were very likely to recommend O’ahu (72.5%) showed significant improvement over the second quarter of the previous year (64.7%).
- The share of U.S. visitors who were very likely to recommend Maui (85.7%) or Kaua’i (84.8%) was similar compared to the second quarter of 2008.

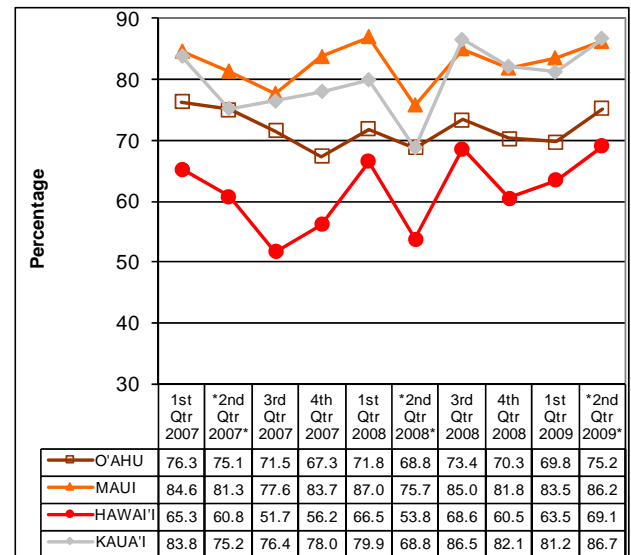
- U.S. visitor ratings for Hawai'i Island (61.9%) decreased compared to the second quarter of 2007 (67.6%) or 2008 (69.4%) (see Figure 11).

**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 continued to be more likely to recommend O'ahu over the other islands. Maui followed at 62.6 percent in the second quarter of 2009 (Figure 12).
- Fewer Japan visitors in the second quarter of 2009 were very likely to recommend Kaua'i (48.3%) compared to the second quarter of 2008 (53.6%). However, there were more Japan visitors who were very likely to recommend Kaua'i in the second quarter of 2009 compared to the second quarter of 2007 (36.5%).

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



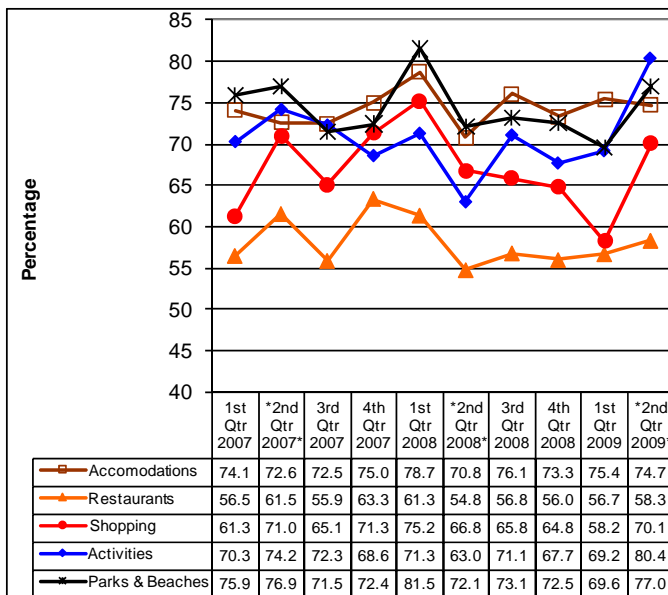
- Since the third quarter of 2008, Canada visitors were more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (Figure 13).
- In the second quarter of 2009, more Canada visitors were very likely to recommend O'ahu (75.2%, +6.4 percentage points), Maui (86.2%, +10.5 percentage points), Hawai'i Island (69.1%, +15.3 percentage points), and Kaua'i (86.7%, +17.9 percentage points) compared to the same quarter of 2008.



## Attributes of Each Island

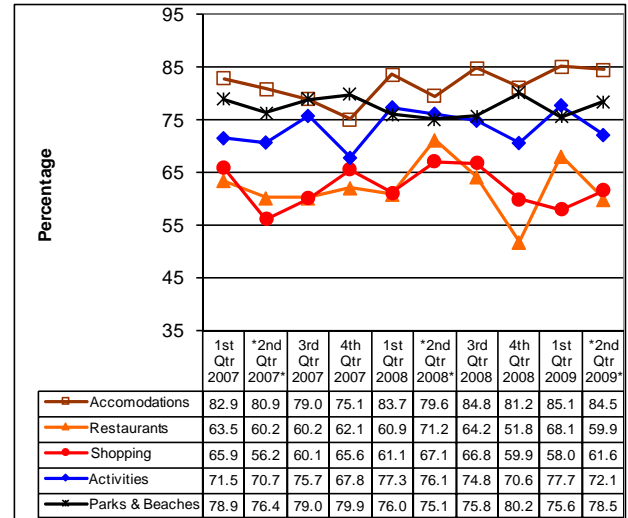
Analysis of the visitors' satisfaction with the specific attributes, activities, and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction 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]**



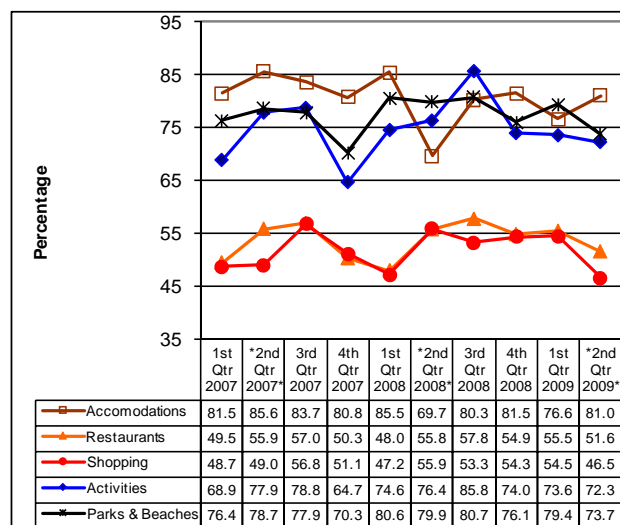
- Activities on O‘ahu were the highest rated attribute among U.S. visitors (80.4%) in the second quarter of 2009, followed by parks and beaches (77%) and accommodations (74.7%). Restaurants (58.3%) on O‘ahu was the lowest rated attribute in the second quarter of 2009 (Figure 14).
- The percentage of U.S. visitors who were very satisfied with the O‘ahu’s activities increased 17.4 percentage points compared to the second quarter of 2008. Significantly more U.S. visitors were very satisfied with the service (+20.2 percentage points), value for their money (+18.9 percentage points), variety of choices (+15.2 percentage points), and excitement (+10.8 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]**



- Accommodations (84.5%) on Maui were the highest rated attribute on the island in the second quarter of 2009, followed by parks and beaches (78.5%) and activities (72.1%); whereas Maui’s shopping (61.6%) and restaurants (59.9%) was the lowest rated attribute on Maui (Figure 15).
- The share of U.S. visitors who were very satisfied with Maui’s restaurants declined 11.3 percentage points compared to the second quarter of 2008. Significantly fewer were very satisfied with the value for their money (-7.6 percentage points) compared to the second quarter of 2008.
- Maui’s shopping satisfaction ratings decreased 5.5 percentage points compared to the second quarter of 2008. Satisfaction ratings were lower for the value for their money (-19.7 percentage points), variety of merchandise (-12.1 percentage points), quality of merchandise (-6.9 percentage points), locations (-5.9 percentage points), and sufficient number of shopping places (-5.8 percentage points).

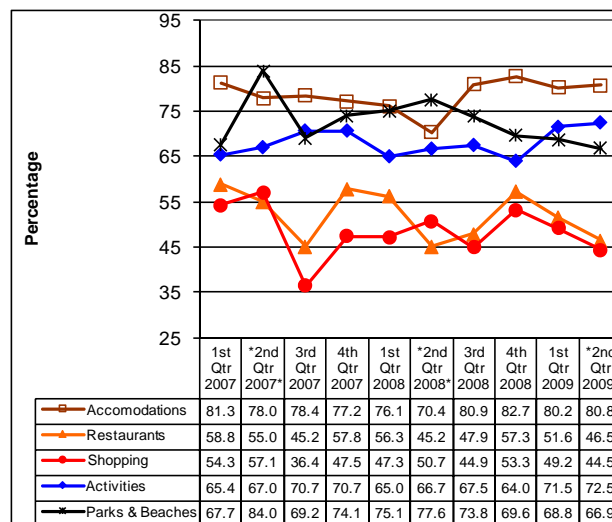
**Figure 16: Detailed Satisfaction Ratings for U.S. Visitors to Kaua'i [Percentage of U.S. visitors to Kaua'i who were "Very Satisfied" with Attribute]**



- U.S. visitors tended to be more satisfied with Kaua'i's accommodations (81%), parks and beaches (73.7%), and activities (72.3%). Restaurants (51.6%) and shopping (46.5%) ratings on the island were much lower than other attributes (Figure 16).
- Kaua'i's accommodations (81%) was ranked the highest rated attribute in the second quarter of 2009 given that satisfaction ratings among U.S. visitors significantly increased compared to the second quarter of 2008 (69.7%). Significantly more U.S. visitors were satisfied with the cleanliness and comfort (+11.8 percentage points), facility (+6.7 percentage points), and service (+6 percentage points).
- Fewer U.S. visitors (73.7%, -6.2 percentage points) rated Kaua'i's parks and beaches excellent compared to the second quarter of 2008. Parks and beaches satisfaction levels were lower for the facility (-8.8 percentage points) and cleanliness and comfort (-8.7 percentage points).
- Kaua'i shopping ratings (46.5%) among U.S. visitors were 9.4 percentage points lower compared to the second quarter of 2008. Shopping satisfaction levels were lower for the variety of choices (-10 percentage points)

and quality of merchandise (-8.5 percentage points) compared to the second quarter of 2008.

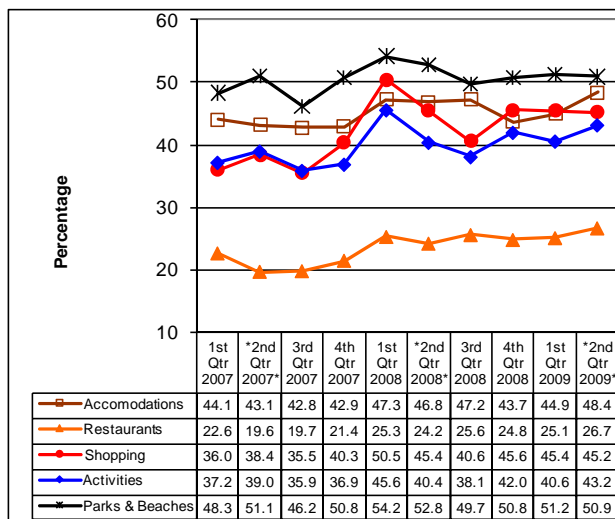
**Figure 17: Detailed Satisfaction Ratings for U.S. Visitors to Hawai'i Island [Percentage of U.S. visitors to Hawai'i Island who were "Very Satisfied" with Attribute]**



- Hawai'i Island's accommodations continued to be the highest rated attribute among U.S. visitors in the second quarter of 2009 (80.8%), followed by activities (72.5%) and parks and beaches (66.9%). Ratings were much lower for the island's restaurants (46.5%) and shopping (44.5%) (Figure 17).
- In the second quarter of 2009, Hawai'i Island accommodation ratings (80.8%) among U.S. visitors significantly increased over the second quarter of 2008 (70.4%). U.S. visitors had notably higher satisfaction levels for the facility (+11.4 percentage points), service (+9.7 percentage points), and value for their money (+9 percentage points).
- Activities was the second highest rated attribute in the second quarter of 2009 (72.5%) due to a 5.8 percentage point increase compared to the second quarter of 2008. More U.S. visitors were very satisfied with the variety of choices (+12.3 percentage points), service (+8.2 percentage points), and excitement (+5.7 percentage points).

- Parks and beaches on Hawai'i Island was also scored high in satisfaction among U.S. visitors in the second quarter of 2009 (66.9%). However satisfaction ratings for the island's parks and beaches decreased 10.7 percentage points compared to the second quarter of 2008 and 17.1 percentage points compared to the second quarter of 2007. Compared to the second quarter of 2008, fewer U.S. visitors were very satisfied with the facility (-6.2 percentage points). Compared to the second quarter of 2007, fewer U.S. visitors were very satisfied with the facility (-10.7 percentage points) and cleanliness and comfort (-9.4 percentage points).
- The proportion of U.S. visitors who enjoyed shopping on Hawai'i Island (44.5%) was 6.2 percentage points lower compared to the second quarter of 2008 and 12.6 percentage points lower compared to the second 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]**



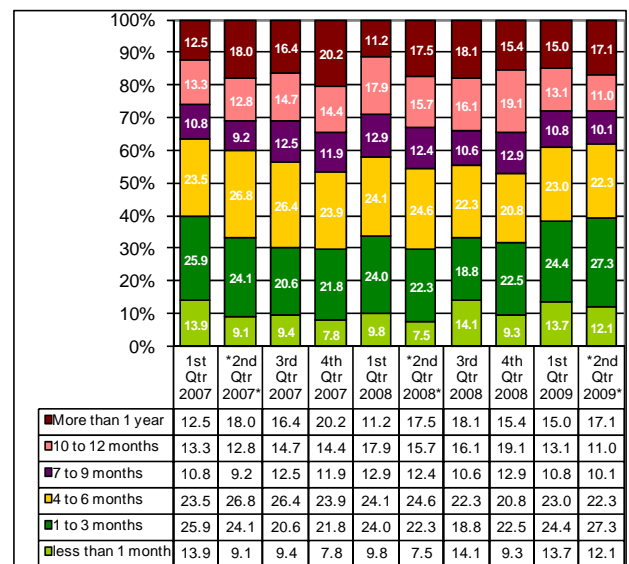
- O'ahu's parks and beaches (50.9%) was the highest rated attribute among Japan visitors in the second quarter of 2009, followed by accommodations (48.4%), shopping (45.2%), and activities (43.2%) (Figure 18).
- A quarter (26.7%) of Japan visitors in the second quarter of 2009, were very satisfied

with Restaurants on O'ahu. Restaurants continued 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.

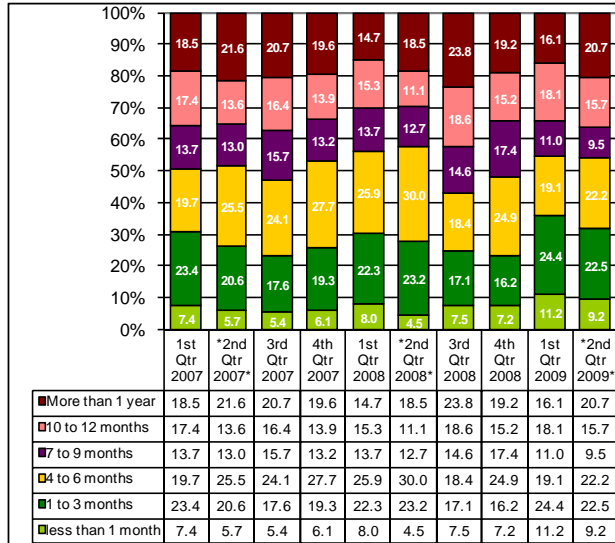
**Figure 19: When Did U.S. West Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. West visitors]**



- The majority of U.S. West visitors tend to make decisions four months or more before arriving.
- However in the second quarter of 2009, significantly fewer U.S. West visitors made their decision to visit Hawai'i four or more months before departure (60.5%) compared to the second quarter of 2007 (66.8%) or 2008 (70.2%) (Figure 19).
- U.S. West visitors were notably more likely to make airline reservations (18.7%, +7 percentage points), purchase tickets (19.7%, +7.2 percentage points), and make accommodation reservations (21.6%, +8 percentage points) less than one month

before departure compared to the second quarter of 2008.

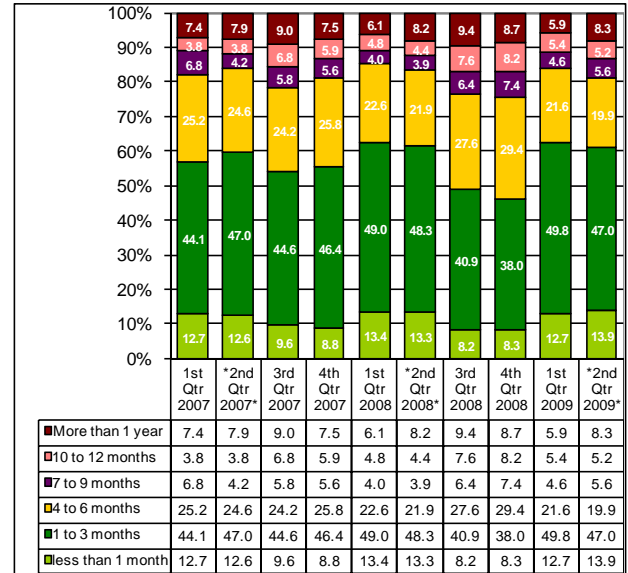
**Figure 20: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]**



- In the second quarter of 2009, more U.S. East visitors were likely to decide to visit Hawai'i ten months or more before departure (36.4%) compared to the second quarter of the previous year (29.6%) (Figure 20)
- At the same time, the share of U.S. East visitors who decided on Hawai'i one to nine months (54.2%) before departure decreased 11.7 percentage points compared to the second quarter of 2008.
- Half (51.2%) of U.S. East visitors made accommodation reservations three months or less before departure compared to less than half in the second quarter of 2007 (46.1%) or 2008 (44.9%). At the same time, the share of U.S. East visitors who made accommodation reservations four to six months (21.9%) significantly declined compared to the second quarter of 2007 (27.7%) or 2008 (30.9%).
- In the second quarter of 2009, U.S. East visitors were distinctively more likely to purchase packaged tours one to three months before departure (27%) compared to the second quarter of 2008 (15.1%), while distinctively less were likely to purchase

tickets less than one month (57.8%) compared to the second quarter of 2008 (66.5%).

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

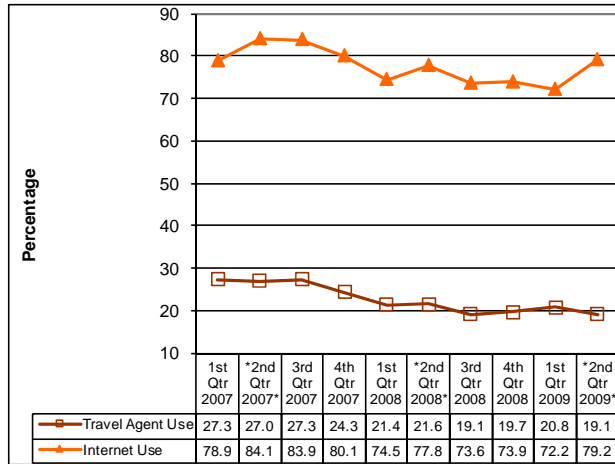


- In the second quarter of 2009, the proportion of Japan visitors who decided to visit Hawai'i three months or less (60.9%) before departure was similar to the second quarter of 2007 (59.6%) or 2008 (61.6%) (Figure 21).

## Internet and Travel Agent Use

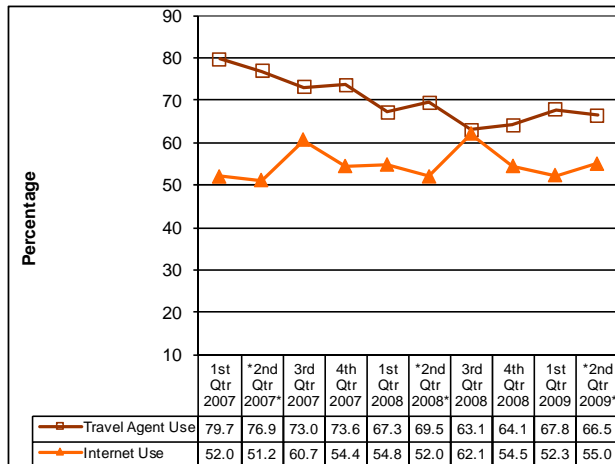
The use of the Internet or a travel agent for trip planning and booking differs quite appreciably between U.S. and Japanese travelers to Hawai'i.

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



- In the second quarter of 2009, the percentage of travel agent and Internet users for trip planning among U.S. visitors were similar to the second quarter of 2008 (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 second quarter of 2009, travel agent users made up 66.5 percent of all Japan visitors. The proportion of travel agent users decreased compared to 69.5 percent in the second

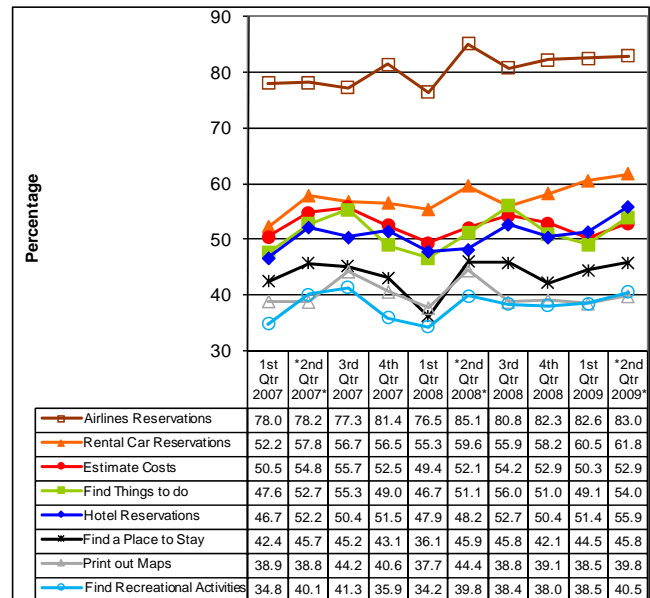
quarter of 2008 and 76.9 percent in the second quarter of 2007 (Figure 23).

- Internet usage was at 55 percent of Japan visitors in the second quarter of 2009. Internet use for the second quarter of 2009 moderately increased compared to the same quarter of 2007 (51.2%) or 2008 (52%).

## Internet Use

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

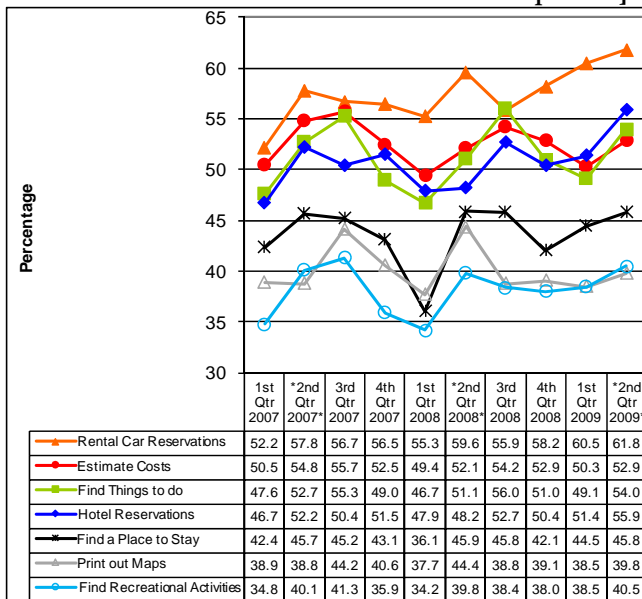
**Figure 24: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]**



- Of the 79.2 percent of U.S. visitors who used the Internet in the second quarter of 2009, 83 percent (65.7% of all U.S. visitors) made airline reservations. The share of U.S. visitors who used the Internet to make airlines reservations was similar compared to the second quarter of 2008 (85.1% or 66.2% of all U.S. visitors) (Figure 24).

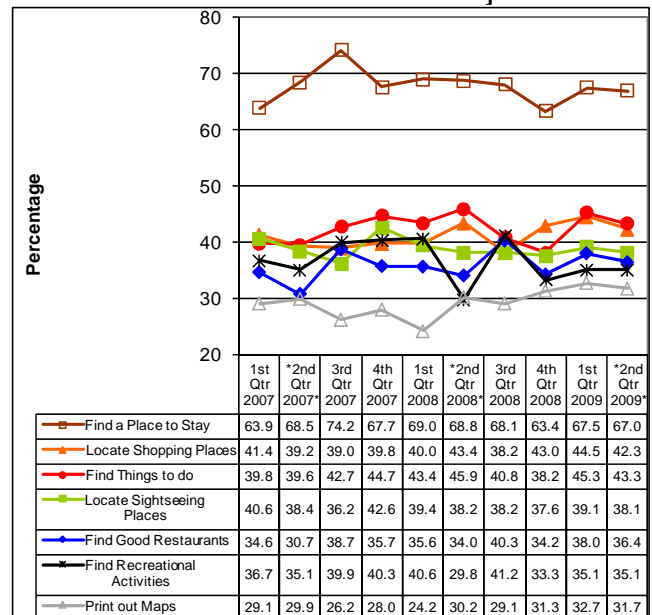


Figure 25: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet - scale expanded]



- The proportion of U.S. Internet users who made rental car reservations in the second quarter of 2009 (61.8% or 48.9% of all U.S. visitors) continued to be higher than most uses since the beginning of 2007. The proportion was similar to the second quarter of 2008 (59.6% or 46.4% of all U.S. visitors). In addition, the proportion continued to increase from the third quarter of 2008 (Figure 25).
- There were significantly more U.S. visitors who used the Internet for hotel reservations (55.9% or 44.3% of all U.S. visitors) in the second quarter of 2009 compared to the second quarter of the previous year (48.2% or 37.5% of all U.S. visitors).
- The share of U.S. Internet users who printed out maps or found recreational activities remained lower than other actions.

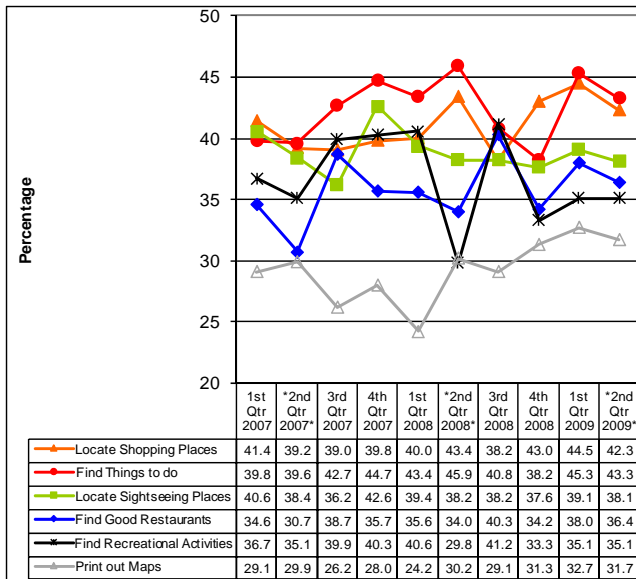
Figure 26: Internet Use – Japan [Percentage of Japan visitors who used the Internet]



- Japanese Internet users were mainly interested in finding an accommodation. For the second quarter of 2009, they comprised 67 percent of Japanese Internet users (36.8% of all Japan visitors), similar to the second quarter of 2007 (68.5% or 35.1% of all Japan visitors) or 2008 (68.8% or 35.8% 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]**

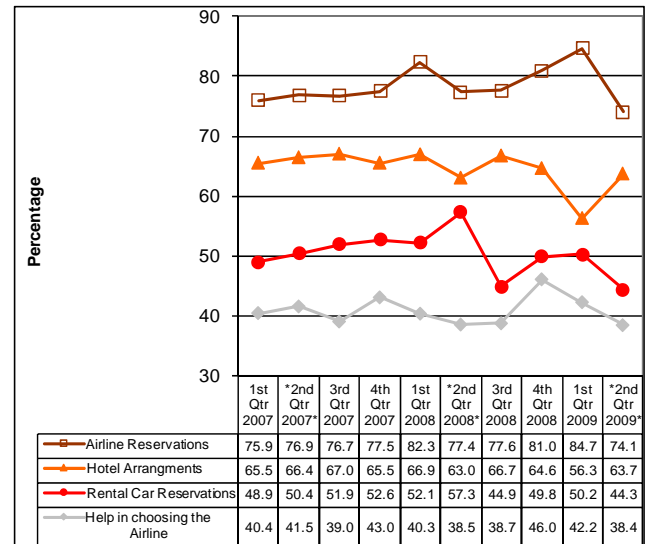


- In the second quarter of 2009, Internet use among Japan visitors to find recreational activities (35.1% or 19.3% of all Japan visitors) significantly increased compared to the same quarter of the previous year (29.8% or 15.5% of all Japan visitors) (Figure 27).
- The proportion of Japanese Internet users who printed out maps was still the lowest usage. In the second quarter of 2009, the proportion (31.7% or 17.4% of all Japan visitors) was similar compared to the second quarter of 2007 (29.9% or 15.3% of all Japan visitors) or 2008 (30.2% or 15.7% of all Japan visitors).

## Travel Agent Use

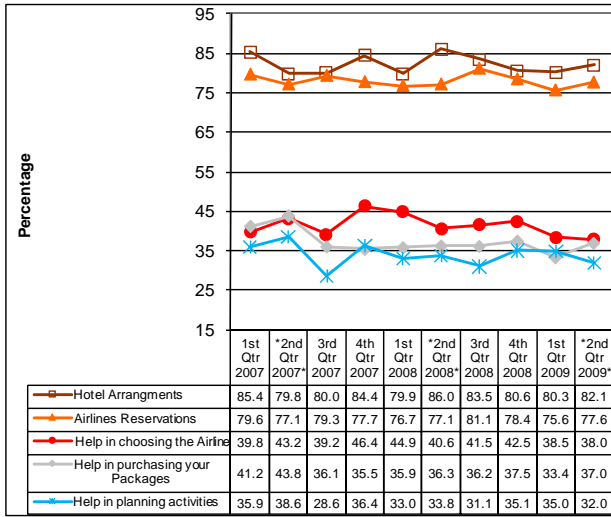
Note that the statistic reported for each travel agent use is the percentage of those who used a travel agent (from Internet and Travel Agent Use).

**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 19.1 percent of U.S. visitors who used a travel agent in the second quarter of 2009, 74.1 percent (14.2% of all U.S. visitors) made airline reservations. The proportion declined compared to the second quarter of 2007 (76.9% or 20.8% of all U.S. visitors) or 2008 (77.4% or 16.7% of all U.S. visitors) (Figure 28).
- U.S. visitors who used a travel agent for assistance in hotel arrangements (63.7% or 12.2% of all U.S. visitors) were similar to the second quarter of 2008 (63% or 13.6% 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 continued to be predominantly for hotel arrangements (82.1% or 54.6% of all Japan visitors) or airline reservations (77.6% or 51.6% of all Japan visitors) (Figure 29).

## DEFINITION AND SURVEY METHODOLOGY

**Major Market Areas (MMA):** The following are defined by the Hawai'i Tourism Authority as the top four 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

Survey questionnaires were mailed to selected U.S., Japan, and Canada visitors after they have returned home. U.S. samples were drawn from the completed Domestic In-Flight Survey forms (Basic Data Series). Japan and Canada 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. and Canada visitors. The 2009 survey has 8 pages and 33 questions.

**Table 1: Sample Size  
April - June 2009**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	4,103	1,397	34.0%	+/- 2.6
U.S.	5,517	1,395	25.3%	+/- 2.6
Canada	1,786	429	24.0%	+/- 4.7

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 Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email [info@hawaii-tourismauthority.org](mailto:info@hawaii-tourismauthority.org).