

2009

Visitor Satisfaction Monitoring Report

Third Quarter
(July – September)



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.

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.

CONDITION OF VISITOR INDUSTRY

In the third quarter (July – September) of 2009, there were 1,715,046 visitors who arrived by air to the state, a growth of 2.7 percent from the same quarter of the previous year. Visitor arrivals from U.S. West with 756,227 (+8.1%) and U.S. East with 395,518 (+0.8%) increased while visitor arrivals from Japan with 315,909 (-1.2%) and Canada with 50,295 (-3.2%) declined. The average length of stay for all visitors to the state was 9.18 days, a decrease from 9.23 days in the third quarter of 2008.

In the third quarter of 2009, statewide first-time visitors comprised 34.5 percent of total visitors, slightly less than 35.1 percent in the third quarter of 2008. The share of first-time visitors among U.S. West visitors was virtually unchanged at 20.5 percent. The share of first-time visitors among Japan (34.7%, -0.6 percentage points), U.S. East visitors (46.3%, -0.7 percentage points), and

Canada (47.7%, +0.4 percentage points) were similar compared to third quarter 2008.

In the first nine months of 2009, total visitors arrived by air fell (-5.9%) to 4,876,919 compared to the first nine months of 2008. The decline was caused by slowed visitor arrivals from U.S. East (-8.3%), Japan (-7.5%), Canada (-7.9%), and U.S. West (-2.6%). The combined length of stay was slightly longer at 9.40 days compared to 9.34 days in the first nine months of 2008.

In first nine months of 2009, statewide first-time visitors comprised 34.2 percent of total visitors, similar to 35.1 percent in the first nine months of 2008. The share of first-time visitors among U.S. West visitors (19.5%, -0.4 percentage points) was virtually unchanged. The share among Canada (37.4%, -1.7 percentage points), and Japan visitors (40.6%, -1.2 percentage points) decreased while U.S. East visitors share (49.9%, +2.1 percentage points) was higher.

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

Overall, 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]

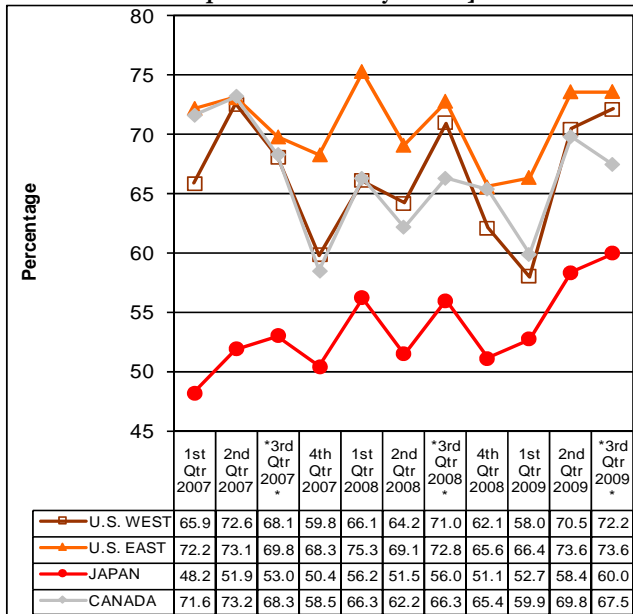
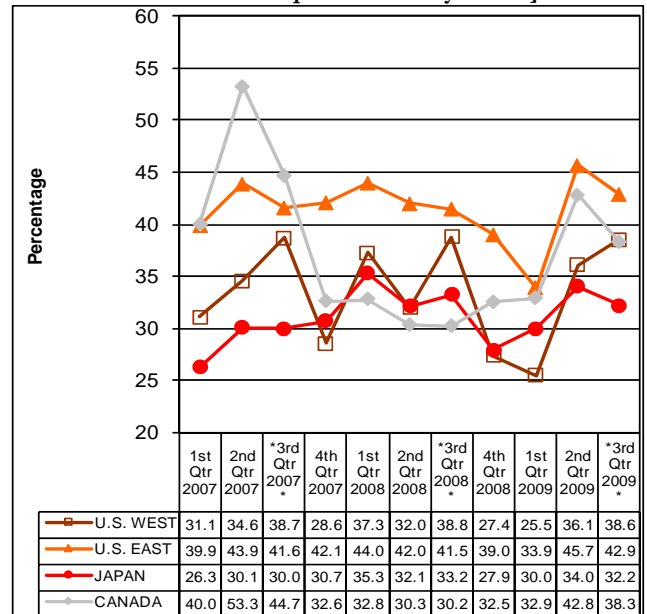


Figure 2: Trip Exceeds Expectations
[Percentage of visitors who said this trip "Exceeded Expectations" by MMA]



- Japan visitor ratings in the third quarter of 2009 (60%) improved 7 percentage points over the third quarter of 2007 and 4 percentage points over the third quarter of 2008.
- In the third quarter of 2009, the share of U.S. West (72.2%), U.S. East (73.6%), and Canada visitors (67.5%) who rated their trip to Hawai'i excellent were consistent with third quarter of 2008.

- Canada visitor ratings in the third quarter of 2009 (38.3%) were 8.1 percentage points higher compared to the third quarter of 2008 but 6.4 percentage points lower compared to the third quarter of 2007.
- In the third quarter of 2009, the proportion of U.S. West (38.6%) and U.S. East visitors (42.9%) who said their recent trip to Hawai'i exceeded expectations was similar to the third quarter of the previous year.
- The share of Japan visitors who said that their trip exceeded expectations (32.2%) was also comparable to the third quarter of 2008 (33.2%).

Exceeded Expectations

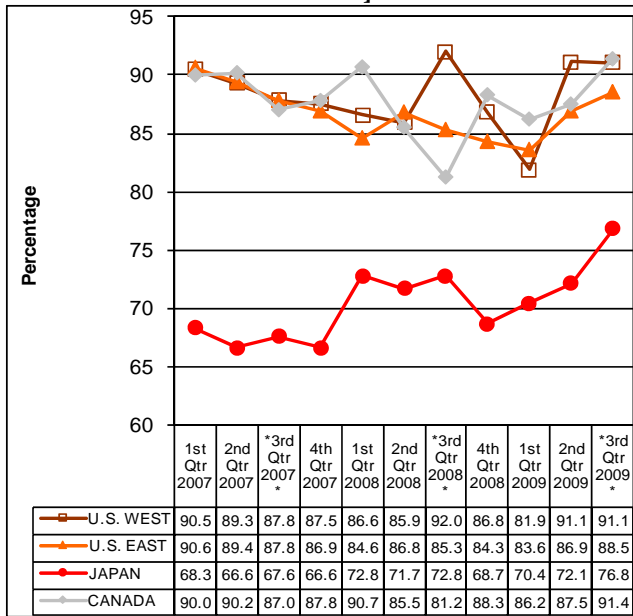
The visitors' evaluation of the trip is influenced not only by the attributes and characteristics of the service but also by the needs, motivations, and interests of the visitors. Therefore, it is important to measure how well the destination was able to provide the experience that was expected. Overall,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

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]



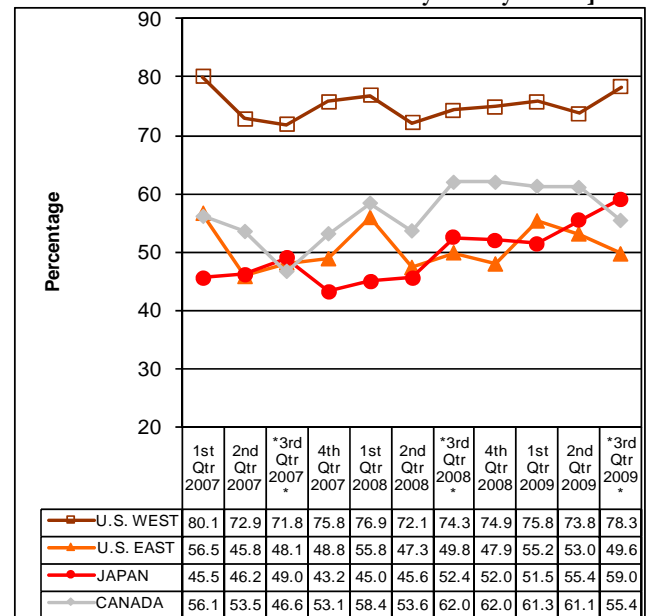
- Significantly more Canada visitors (91.4%, +10.2 percentage points) in the third quarter of 2009 were very likely to recommend Hawai'i to friends and relatives compared to the third quarter of 2008.
- The percentage of Japan (76.8%, +4 percentage points) and U.S. East (88.5%, +3.2 percentage points) visitors was also higher while U.S. West results (+91.1%, -0.9 percentage points) were similar to third 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]

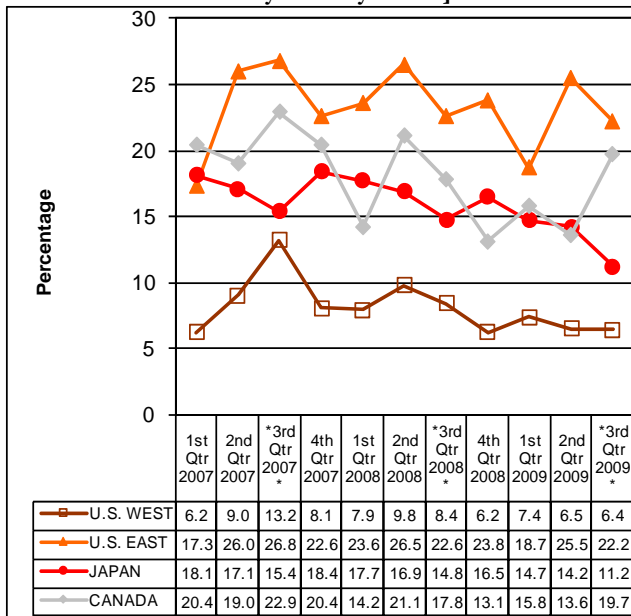


- In the third quarter of 2009, the share of U.S. West visitors who were very likely to revisit Hawai'i in the next five years (78.3%) were 4 percentage points higher compared to the third quarter of 2008 and 6.5 percentage points higher compared to the third quarter of 2007. U.S. East share (49.6%) was virtually unchanged from a year ago.
- Japan share of visitors who were very likely to revisit Hawai'i in the next five years (59%) also increased, up 6.6 percentage points higher compared to the third quarter of 2008 and 10 percentage points compared to the third quarter of 2007.
- Fewer Canada visitors in third quarter 2009 (55.4%, -6.6 percentage points) were very likely to revisit compared to the third 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 third quarter of 2009, the percentage of U.S. West (6.4%, -2 percentage points) and Japan (11.2%, -3.6 percentage points) visitors who were not likely to revisit was lower compared to the third quarter of 2008. The percentage of U.S. West (-6.8 percentage points) and Japan (-4.2 percentage points) visitors also decreased compared to the third quarter of 2007.
- One out of five (22.2%) U.S. East visitors were not likely to revisit Hawai'i in the next five years. The proportion was consistent with third quarter of 2008 (22.6%) and 4.6 percentage points lower than third quarter 2007.

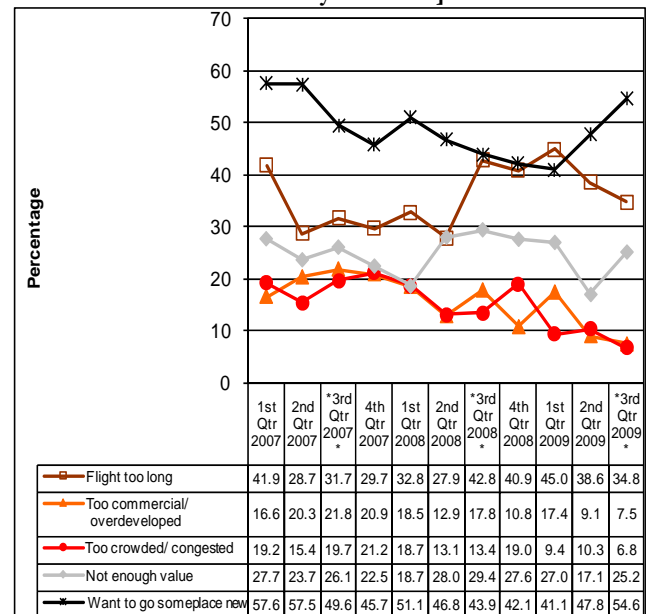
- Close to 20 percent of Canada visitors were not likely to revisit Hawai'i in the next five years, 1.9 percentage points higher than third quarter 2008 but 3.2 percentage points lower than third quarter 2007.

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).

- Over half of U.S. visitors in third quarter 2009 were not likely to revisit Hawai'i because they want to visit someplace new (54.6%). The proportion was higher compared to the third quarter of 2008 (43.9%) and third quarter of 2007 (49.6%) (Figure 6).

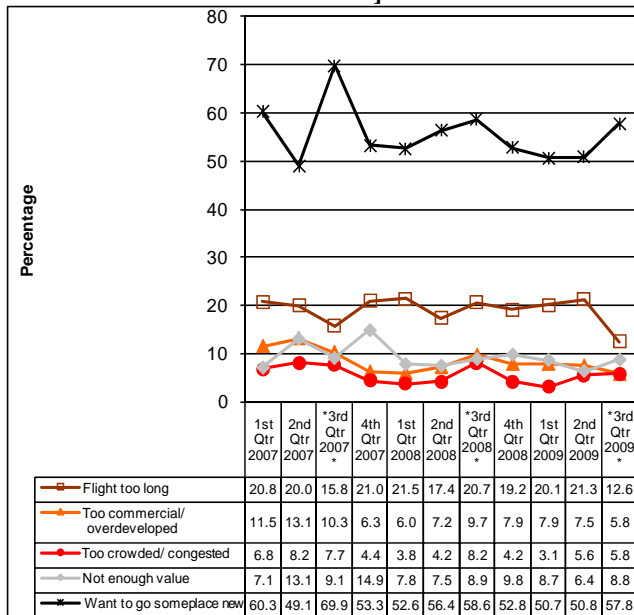
Figure 6: Reasons for Not Revisiting Hawai'i - U.S. [Percentage of visitors who were not likely to revisit]



- The share of U.S. visitors who said that the flight was too long (34.8%) fell 8 percentage points compared to the third quarter of 2008 but increased 3.1 percentage points compared to the third quarter of 2007.

- Fewer U.S. visitors said that Hawai'i did not provide enough value (25.2%) compared to the third quarter of 2008 (29.4%).
- Fewer U.S. visitors said that Hawai'i was too commercial/overdeveloped (7.5%) compared to third quarter 2008 (17.8%) and third quarter 2007 (21.8%).

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



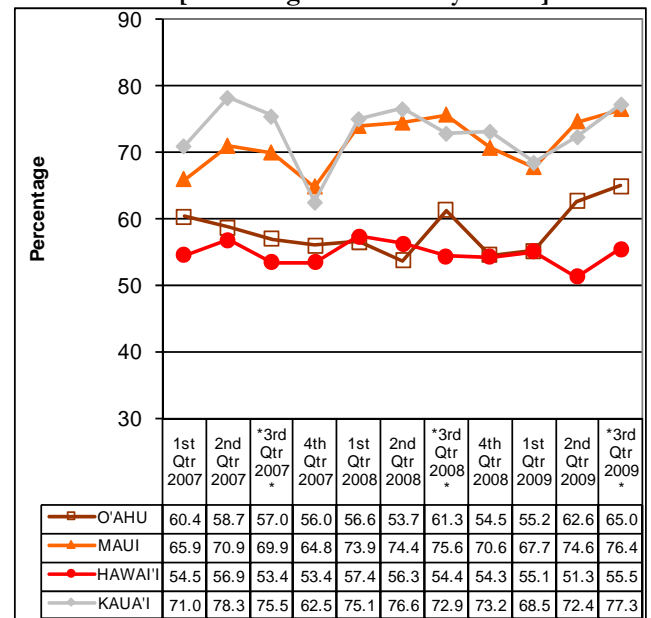
- In the third quarter of 2009, over half (57.8%) of Japan visitors said that they want to visit someplace new. The proportion was similar to third quarter 2008 (58.6%) and 12.1 percentage points lower compared to the third quarter of 2007 (Figure 7).
- Fewer Japan visitors in third quarter of 2009 thought that the flight was too long (12.6%) compared to third quarter 2008 (20.7%) and third quarter 2007 (15.8%).
- Close to 9 percent of Japan visitors in the third quarter of 2009 said that Hawai'i did not provide enough value, consistent with responses from third quarter 2008 and 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.

- 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).

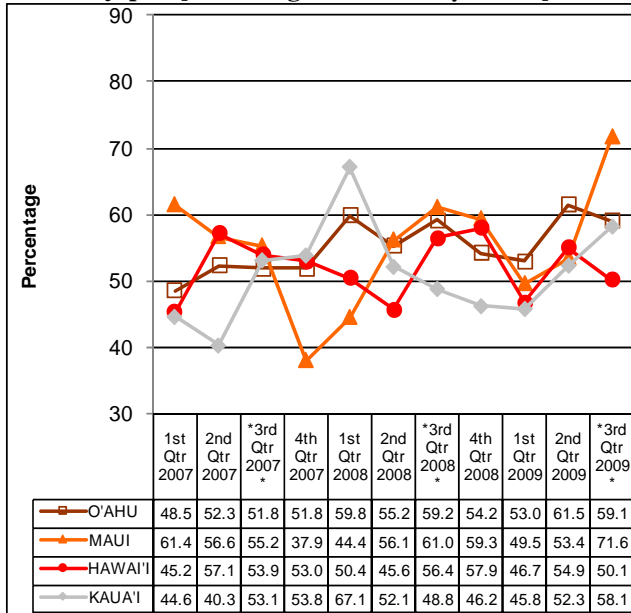
Figure 8: Island Experience Rated as Excellent – U.S. [Percentage of visitors by Island]



- In the third quarter of 2009, the share of U.S. visitors who rated O'ahu excellent (65%) increased 3.7 percentage points from third quarter 2008 and 8 percent from third quarter 2007.
- In the third quarter of 2009, U.S. visitors rated Maui (76.4%) similar to the third quarter of 2008 (75.6%) and 6.5 percentage points higher than third quarter 2007.
- U.S. visitor ratings for Kaua'i (77.3%) increased 4.4 basis points from third quarter 2008 (72.9%) and was similar to third quarter 2007 (75.5%). U.S. ratings for Hawai'i Island (55.5%) were in line with results from third

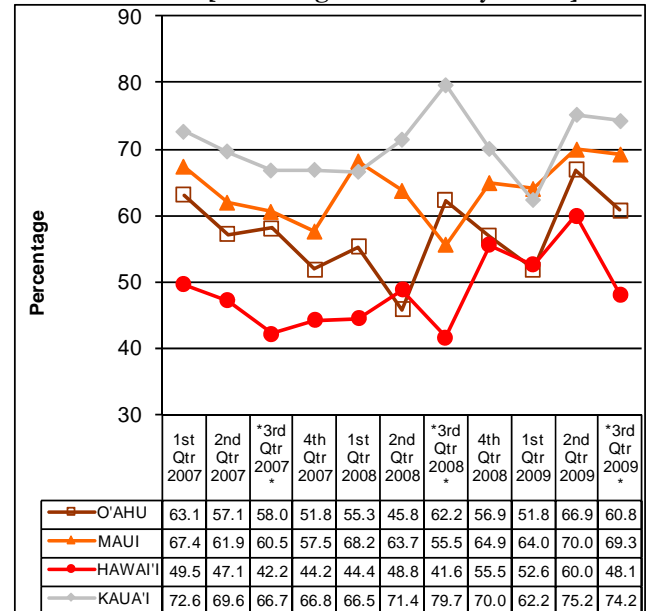
quarter 2008 (54.4%) and third quarter 2007 (53.4%).

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



- In the third quarter of 2009, nearly three out of four (71.6%) Japan visitors rated Maui excellent, the best result for this island in the last two years. The proportion was 10.6 percentage points higher compared to the third quarter of 2008 and 16.4 percentage points higher compared to the third quarter of 2007 (Figure 9).
- Japan visitors rating for O'ahu (59.1%) was virtually unchanged from third quarter 2008 (59.2%) and 7.3 percentage points higher compared to the third quarter of 2007.
- Kauai ratings (58.1%) among Japan visitors improved 9.3 percentage points from third quarter 2008 and 5 percentage points from third quarter 2007.
- Half (50.1%) of Japan visitors rated Hawai'i Island excellent in the third quarter of 2009, down 6.3 percentage points from third quarter 2008 and 3.8 percentage points from third quarter 2007.

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

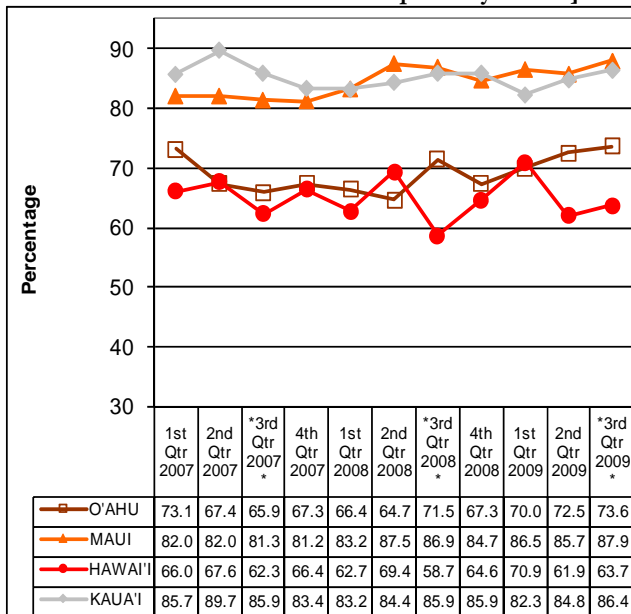


- Canada visitor satisfaction ratings in the third quarter of 2009 significantly improved for Maui (69.3%) compared to the third quarter of 2008 (55.5%) and 2007 (60.5%) (Figure 10).
- In the third quarter of 2009, Kauai ratings by visitors from Canada (74.2%) were 5.5 percentage points lower than third quarter 2008 but 7.5 percentage points higher compared to third quarter 2007.
- Canada visitor ratings for O'ahu (60.8%) were similar to third quarter 2008 (62.2%) and 2007 (58%).
- Hawai'i Island satisfaction ratings from Canada visitors continued to be lower in the third quarter than in other quarters of the year. Third quarter 2009 (48.1%) ratings showed moderate improvements compared to the third quarter of 2008 (41.6%) and 2007 (42.2%).

Individual Island Recommendation

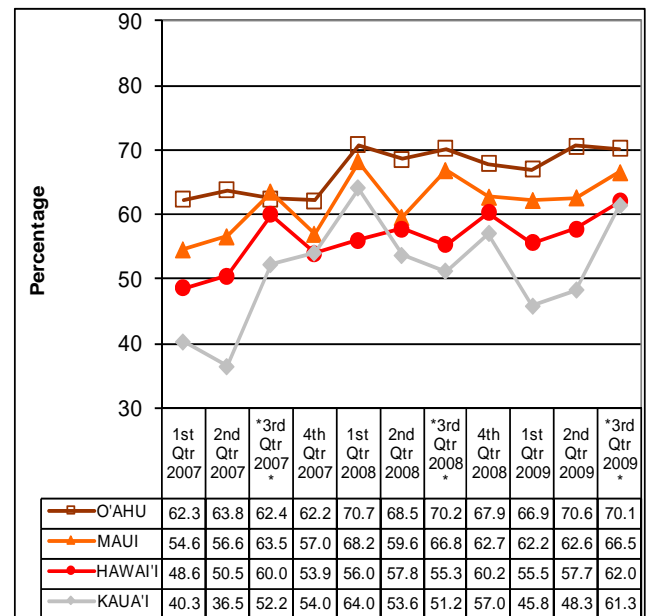
When visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family.

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]



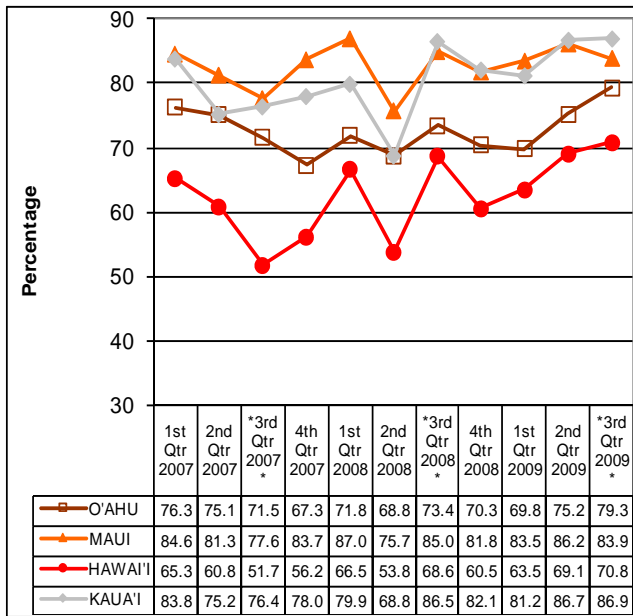
- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (see Figure 11).
- In the third quarter of 2009, the percentage of U.S. visitors who were very likely to recommend Hawai'i Island (63.7%) showed improvement over the third quarter of the previous year (58.7%).
- The share of U.S. visitors who were very likely to recommend Maui (87.9%), Kaua'i (86.4%) or O'ahu (73.6%) was similar compared to the third quarter of 2008.

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 in the third quarter 2009 continued to be more likely to recommend O'ahu (70.1%) over the other islands, virtually unchanged from third quarter 2008 and 7.7 percentage point higher than third quarter 2007 (Figure 12).
- Maui followed at 66.5 percent in the third quarter of 2009, consistent with third quarter 2008 (66.8%) and 2007 (63.5%).
- Many more Japan visitors in the third quarter of 2009 were very likely to recommend Kaua'i (61.3%) compared to the third quarter of 2008 (51.2%) and 2007 (52.2%). There were also more Japan visitors who were very likely to recommend Hawai'i Island in the third quarter of 2009 (62.0%) compared to the same quarter in 2008 (55.3%).

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

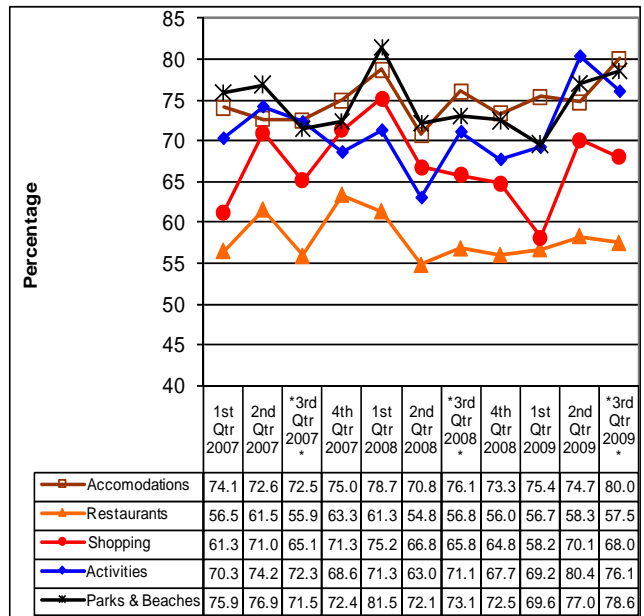


- Since the third quarter of 2008, Canada visitors were more likely to recommend Maui or Kaua'i over O'ahu or Hawai'i Island (Figure 13).
- In the third quarter of 2009, more Canada visitors were very likely to recommend O'ahu (79.3%) compared to third quarter 2008 (73.4%) and 2007 (71.5%).
- Canada visitor ratings for Kaua'i (86.7%, +0.4 percentage points), Maui (83.9%, -1.1 percentage points) and Hawai'i Island (70.8%, +2.2 percentage points) were stable compared to third quarter 2008.

Attributes of Each Island

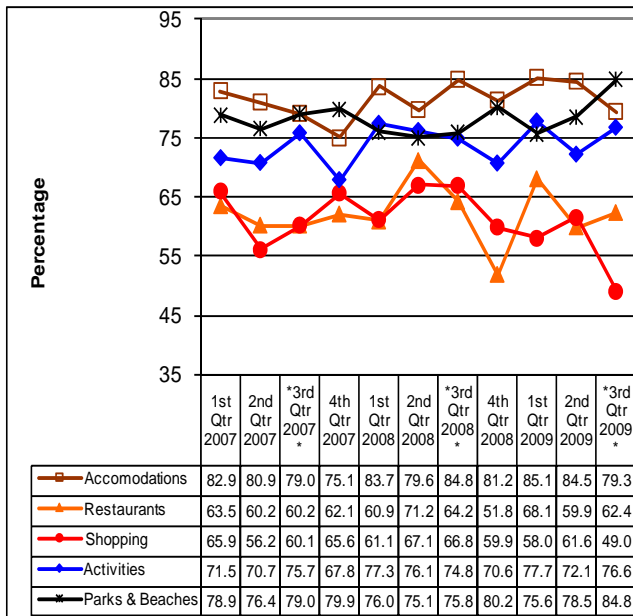
Analysis of the visitors' satisfaction with the specific attributes, activities, and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction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



- Accommodations on O'ahu were the highest rated attribute among U.S. visitors (80%) in the third quarter of 2009, followed by parks and beaches (78.6%) and activities (76.1%). Restaurants (58.3%) on O'ahu was the lowest rated attribute in the second quarter of 2009 (Figure 14).
- Third quarter 2009 ratings by U.S. visitors for all attributes on O'ahu either showed moderate improvements or were consistent with third quarter 2008 results. The percentage of U.S. visitors who were very satisfied with the O'ahu's parks and beaches (78.6%, +5.5 percentage points) and activities/attractions (76.1%, +5 percentage points) increased from third quarter 2008. In third quarter 2009, seven out of ten U.S. visitors were very satisfied with the variety (75.2%), service (72.7%) and excitement (70.9%) at activities/attractions on O'ahu while two out of three visitors were very satisfied with the facilities (68.1%), security (67%) and cleanliness and comfort (66.5%) of the island's parks and beaches.

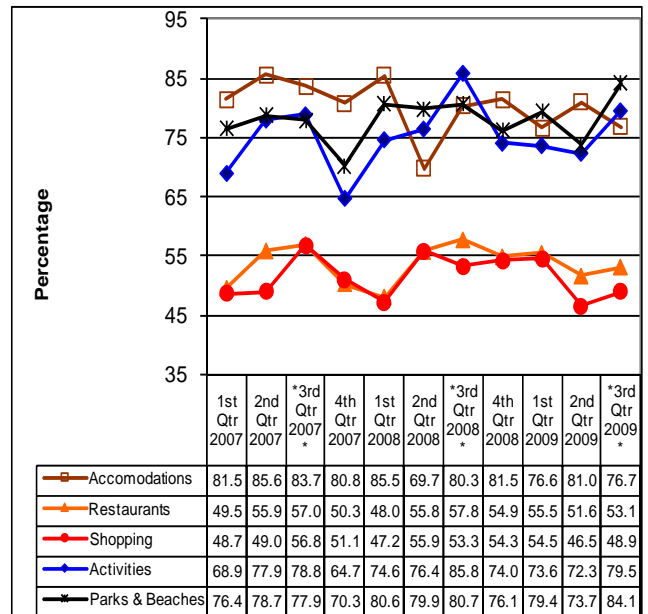
Figure 15: Detailed Satisfaction Ratings for U.S. Visitors to Maui [Percentage of U.S. visitors to Maui who were “Very Satisfied” with Attribute]



- Parks and beaches (84.8%) on Maui were the highest rated attribute among U.S. visitors in the third quarter of 2009, followed by accommodations (79.3%) and activities (76.6%); whereas Maui’s shopping (49%) was the lowest rated attribute on Maui (Figure 15).
- The share of U.S. visitors who were very satisfied with Maui’s parks and beaches rose 9 percentage points from third quarter 2008. Three out of four visitors in third quarter 2009 were very satisfied with the cleanliness and comfort (75.4%) and two out of three visitors were very satisfied with the facility (69%) and security (65.6%).
- Maui’s accommodation satisfaction ratings decreased 5.5 percentage points compared to the third quarter of 2008.
- U.S. visitors who were very satisfied with Maui’s shopping declined 17.8 percentage points compared to the third quarter of 2008. Two out of three U.S. visitors in third quarter 2009 were very satisfied with sufficient number of shopping places (63%), service (62.7%) and locations (60.3%). However, less

than half of the visitors were very satisfied with the variety (48.4%), quality (42.6%), local/handmade items (46.9%) and value for the money (27.7%).

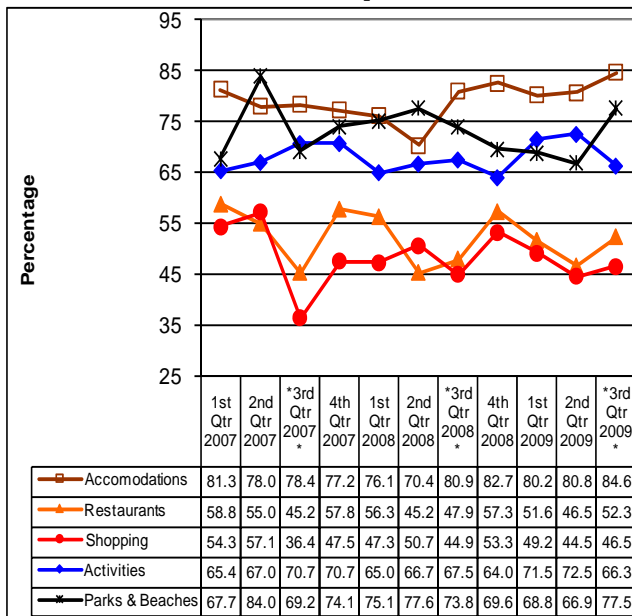
Figure 16: Detailed Satisfaction Ratings for U.S. Visitors to Kaua‘i [Percentage of U.S. visitors to Kaua‘i who were “Very Satisfied” with Attribute]



- U.S. visitors in third quarter 2009 tended to be more satisfied with Kaua‘i’s parks and beaches (84.1%), activities (79.5%) and accommodations (76.7%). Restaurants (53.1%) and shopping (48.9%) ratings on the island were much lower than other attributes (Figure 16).
- Ratings on Kaua‘i’s activities decreased 6.3 percentage points from third quarter 2008 (85.8%). Three out of four U.S. visitors in third quarter 2009 were very satisfied with the variety (75.8%), excitement (74.8%) and service (73%) but less than half (47.9%) were very satisfied with the value for their money.
- Fewer U.S. visitors (-4.7 percentage points) rated Kaua‘i’s restaurants excellent compared to the third quarter of 2008 (57.8%). Close to half of the U.S. visitors in third quarter 2009 were very satisfied with the location (59.9%),

service (59.9%), quality (56.7%), 48.4% were pleased with the variety but only 29 percent felt that there was value for the money.

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]

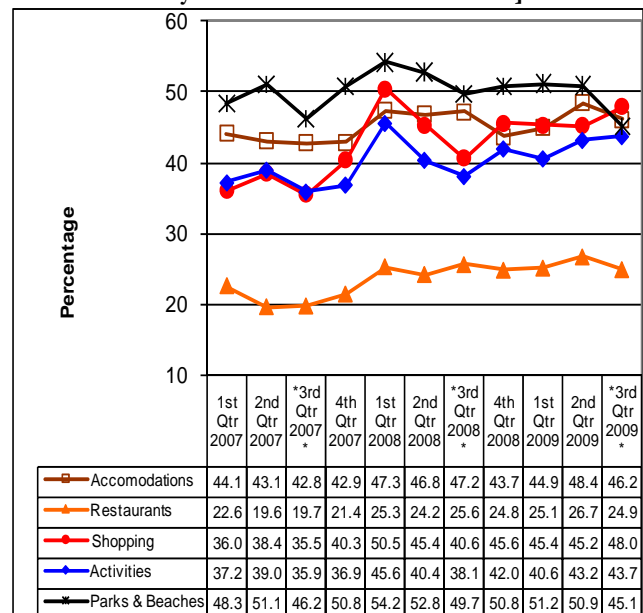


- Hawai'i Island's accommodations continued to be the highest rated attribute among U.S. visitors in the third quarter of 2009 (84.6%), followed by parks and beaches (77.5%) and activities (66.3%). Similar to Kaua'i and Maui, ratings were much lower for Hawai'i Island's restaurants (52.3%) and shopping (46.5%) (Figure 17).
- In the third quarter of 2009, Hawai'i Island restaurant ratings, among U.S. visitors, improved 4.4 percentage points over the third quarter of 2008 (47.9%). Over half of these visitors were very satisfied with the service (63.8%), quality (58.4%), location (55.5%) and variety (50.2%). However, only 32.9 percent felt there was value for the money.
- Ratings for the island's parks and beaches among U.S. visitors improved (+3.7 percentage points) from third quarter of 2008 (73.8%). Over half of the U.S. visitors in

third quarter 2009 were very satisfied with the facility (68.8%), security (65.4%), and cleanliness and comfort (59.9%).

- Ratings for the island's accommodations among U.S. visitors were also 3.7 percentage points higher than third quarter of 2008 (80.9%). Two out of three U.S. visitors in third quarter 2009 were very satisfied with the service (75.2%), facility (74.5%), location (74%), cleanliness and comfort (74%) and value for the money (67.3%).

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



- Restaurants continued to be the lowest rated attribute. In the third quarter of 2009, 24.9 percent of Japan visitors were very satisfied with restaurants on O'ahu.
- In third quarter of 2009, shopping (48%) was the highest rated attribute among Japan visitors on O'ahu, followed by accommodations (46.2%), parks and beaches (45.1%), and activities (43.7%) (Figure 18).
- O'ahu's shopping ratings among Japan visitors improved 7.4 percentage points from 40.6 percent in the third quarter of 2008.

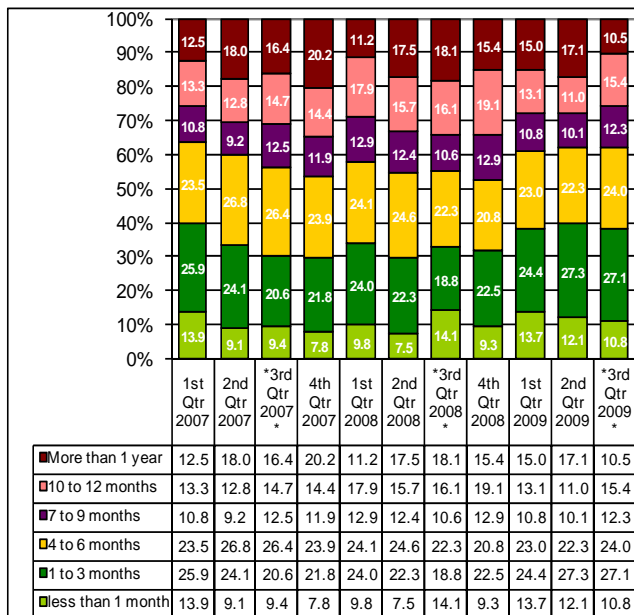
Over half of Japan visitors in the third quarter 2009 were felt that there were sufficient shopping places (59.5%) on this island, while less than half were very satisfied with the locations (48.4%), variety (47.2%), service (32.6%) and quality (29.9%).

- Japan visitors' ratings for activities on O'ahu also improved 5.6 percentage points from third quarter 2008 (38.1%). Four out of ten visitors were very satisfied with the excitement (46.4%) and variety (41.2%), but fewer were very satisfied with the service (34.2%) and value for the money (26.1%).

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.

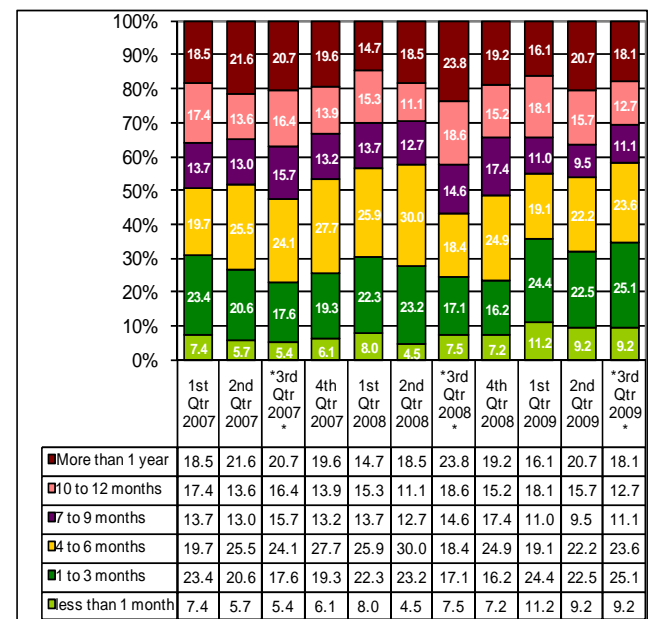
Figure 19: When Did U.S. West Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. West visitors]



- The majority of U.S. West visitors continued to make decisions four months or more before arriving.

- However in the third quarter of 2009, fewer U.S. West visitors made their decision to visit Hawai'i four or more months before departure (62.2%) compared to the third quarter of 2008 (67.1%) and 2007 (70%) (Figure 19).
- The majority of U.S. West visitors in the third quarter 2009 purchased package tours (72.1%) less than one month before departure. Over half of U.S. West visitors made rental car reservations (74.9%) and accommodation reservations (51.8%) three months or less before coming to the islands.

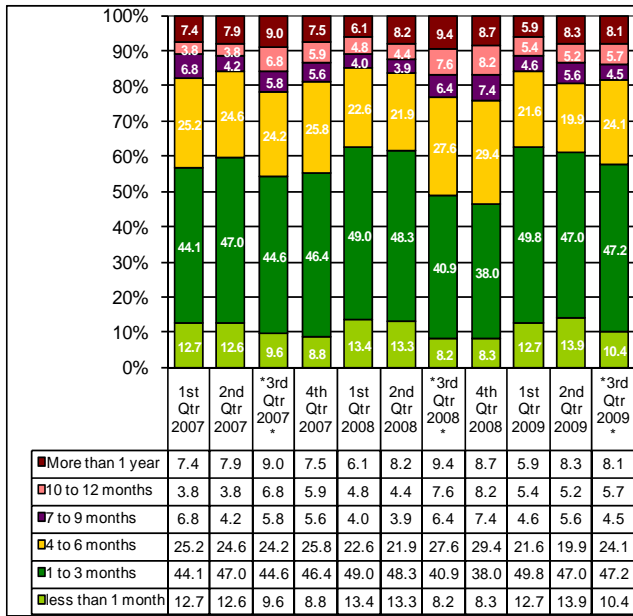
Figure 20: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]



- In the third quarter of 2009, more U.S. East visitors were likely decide to visit Hawai'i one to nine months (59.8%) before departure compared to the third quarter of the previous year (50.1%) (Figure 20).
- Over half (52.1%) of U.S. East visitors in third quarter 2009 made accommodation reservations and rental car reservations (68.9%) three months or less before

departure, while 65.5 percent of U.S. East visitors purchased packaged tours less than one month before coming to the islands.

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



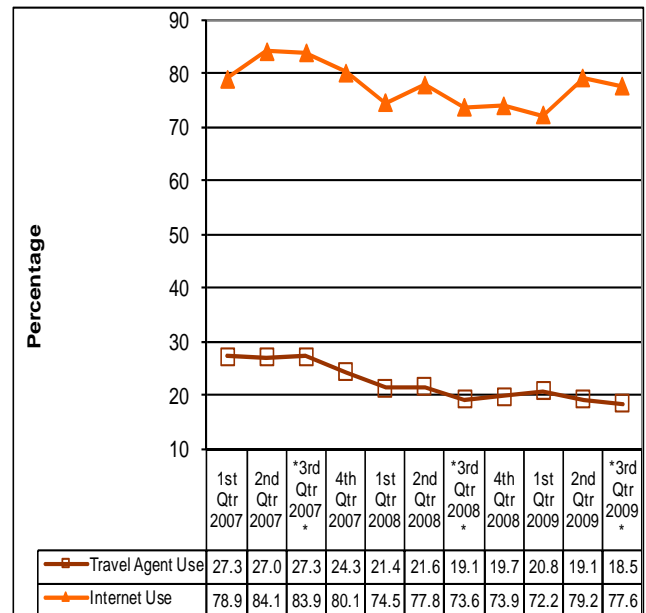
- In the third quarter of 2009, the proportion of Japan visitors who decided to visit Hawai'i three months or less (57.6%) before departure was significantly higher than the third quarter of 2008 (49.1%) and moderately higher than third quarter 2007 (54.2%) (Figure 21).
- The majority of Japan visitors in third quarter 2009 made accommodations reservations (78.6%) and rental car reservations (87.2%) three months or less before departure while 64.5 percent purchased packages less than one month before their departure.

Internet and Travel Agent Use

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

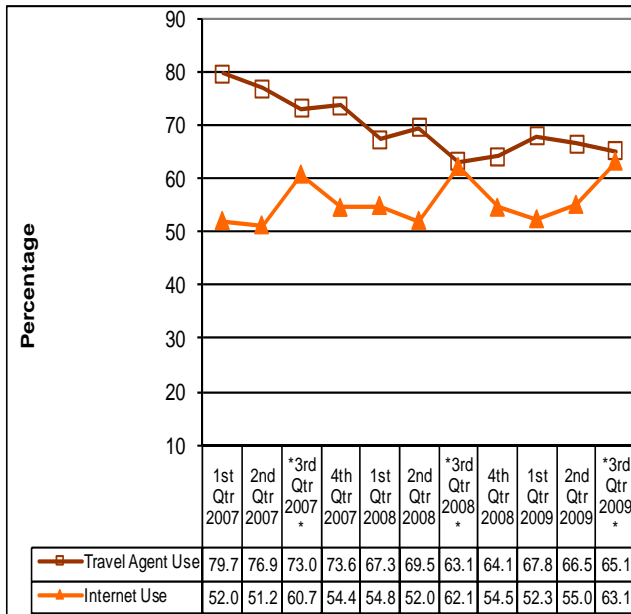
- Over three out of four U.S. visitors used the internet for trip planning purposes while less than a quarter of U.S. visitors used travel agents. In the third quarter of 2009, the percentage of U.S. visitors who used the Internet for trip planning rose 4 percentage points from third quarter 2008 to 77.6 percent.

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



- The percentage of U.S. visitors who used travel agents in third quarter 2009 (18.5%) was similar to the third quarter of 2008 (19.1%) (Figure 22).

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

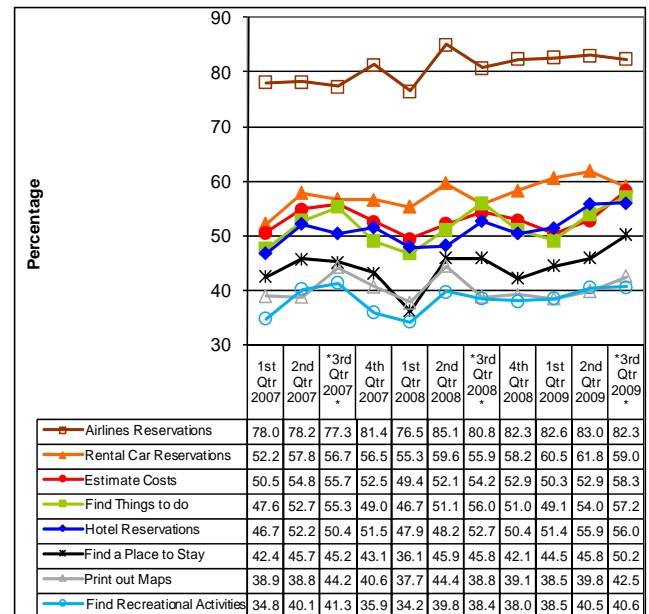


- In contrast to U.S. visitors, more Japanese visitors used travel agents than the Internet for trip planning. However, over the last two years, travel agent usage by Japanese visitors had been declining while Internet usage had been gaining popularity. In the third quarter of 2009, travel agent users comprised 65.1 percent of all Japan visitors. The proportion of travel agent users rose compared to 63.1 percent in the third quarter of 2008 but decreased from 73 percent in the third quarter of 2007 (Figure 23).
- Internet usage was at 63.1 percent of Japan visitors in the third quarter of 2009, similar to 62.1 percent in third quarter 8 and up 2.4 percentage points from third quarter 2007 (60.7%).

Internet Use

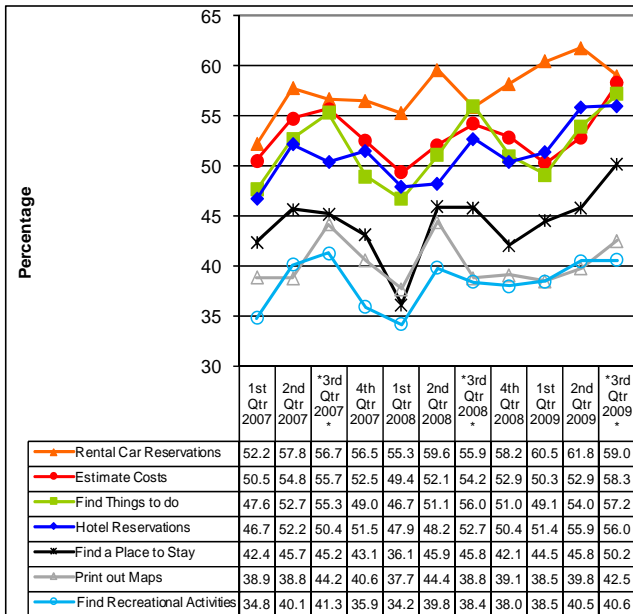
Note that the statistic reported for each Internet use is the percentage of those who used the Internet (from previous section).

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



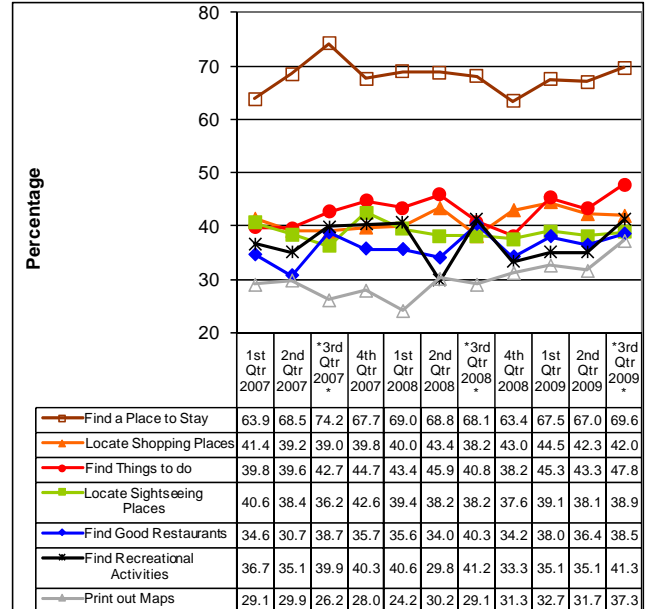
- Of the 77.6 percent of U.S. visitors who used the Internet in the third quarter of 2009, 82.3 percent (63.9% of all U.S. visitors) made airline reservations. The share of U.S. visitors who used the Internet to make airlines reservations was similar compared to the third quarter of 2008 (80.8% or 59.5% of all U.S. visitors) and increased 5 percentage points from third quarter 2007 (77.3% or 64.8 percent of all U.S. visitors) (Figure 24).

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



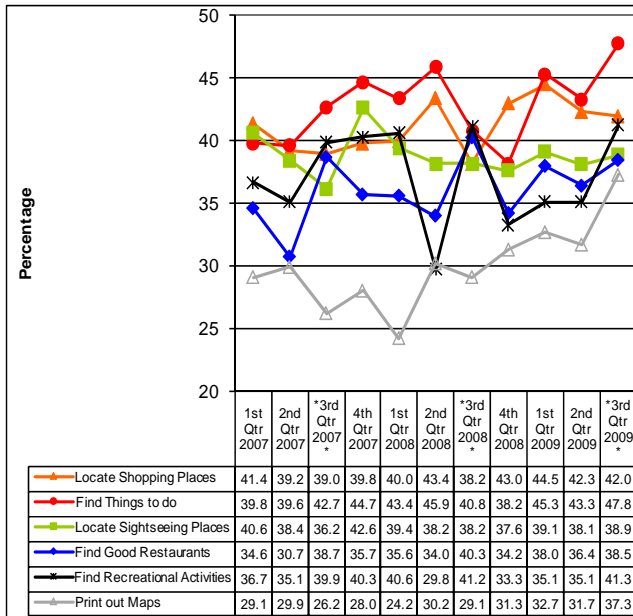
- Making car reservations remained the second most popular usage of the Internet among U.S. visitors. In the third quarter of 2009, 59 percent of U.S. Internet users made rental car reservations (45.8% of all U.S. visitors). This proportion was 3.1 percentage points higher compared to third quarter 2008 (55.9% or 41% of all U.S. visitors) and 2.3 percentage points higher than third quarter 2007 (56.7% or 47.6% of all U.S. visitors) (Figure 25).
- Slightly more U.S. visitors in the third quarter of 2009 used the Internet to estimate costs (58.3%) and to find things to do (57.2%) than to make hotel reservations (56%). This was a similar pattern for the third quarter of 2008 and the third quarter of 2007.
- The share of U.S. Internet users who printed out maps (+3.7 percentage points to 42.5%) or found recreational activities (+2.2 percentage points to 40.6%) increased compared to third quarter 2008 but remained lower than other usage.

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 third quarter of 2009, they accounted for 69.6 percent of Japanese – Internet users (43.9% of all Japan visitors), similar to the third quarter of 2008 (68.1% or 42.3% of all Japan visitors) but 4.6 percent points lower than third quarter 2007 (74.2% or 45% 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]

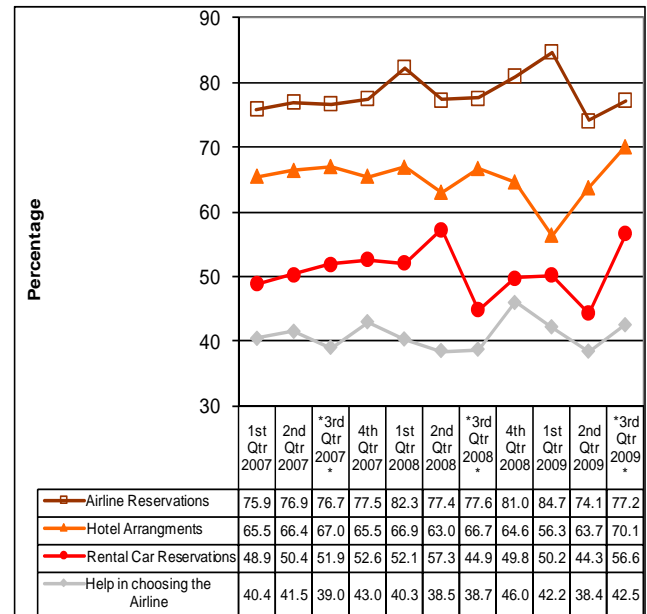


- In the third quarter of 2009, Internet use among Japan visitors who found things to do rose significantly to 47.8% (30.1% of all Japan visitors) compared to third quarter 2008 (40.8% or 42.3% of all Japan visitors) (Figure 27).
- Printing out maps remained the lowest activities among Japanese Internet users in third quarter 2009 (37.3%, or 23.5% of all Japan visitors). However this activities showed noticeable increases from third quarter 2008 (29.1%, or 18.1% of all Japan visitors) and from third quarter 2007 (26.2%, or 15.9 percent 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).

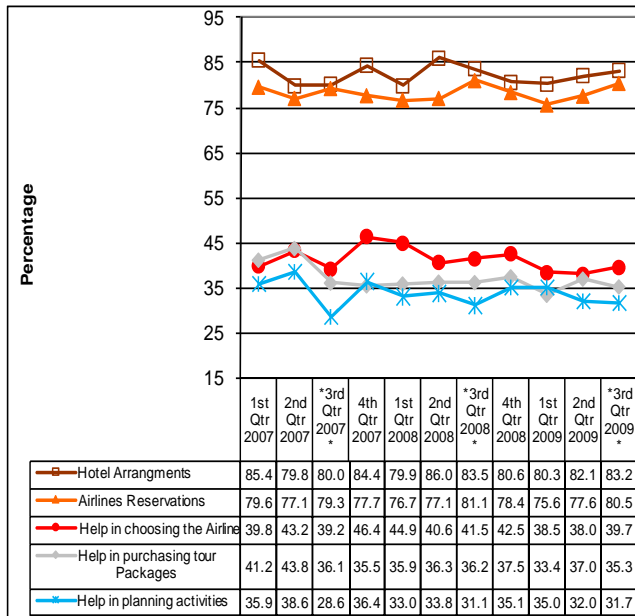
Figure 28: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]



- U.S. visitors mainly used travel agents to make airline reservations. Of the 18.5 percent of U.S. visitors who used a travel agent in the third quarter of 2009, 77.2 percent (14.3% of all U.S. visitors) made airline reservations. The proportion was virtually unchanged from the third quarter of 2008 (77.6% or 14.8% of all U.S. visitors) or 2007 (76.7% or 20.8% of all U.S. visitors) (Figure 28).
- The second most popular use of travel agent among U.S. visitors in the third quarter 2009 was in making hotel arrangements (70.1% or 13% of all U.S. visitors). This was an increase of 3.4 percentage points from third quarter 2008 (66.7% or 12.8% of all U.S. visitors).

- In the third quarter of 2009, the percentage of U.S. visitors who used travel agents to make rental car reservations increased significantly to 56.6% (10.5% of all U.S. visitors) compared to third quarter 2008 (44.9% or 8.6% 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 primarily for hotel arrangements (83.2% or 54.1% of all Japan visitors) or airline reservations (80.5% or 52.4% of all Japan visitors) (Figure 29). These proportions were very similar to third quarter of 2008.

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
July - September 2009**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	1,720	628	36.5%	+/- 3.12
U.S.	5,841	1,497	25.6%	+/- 2.18
Canada	1,418	321	22.6%	+/- 4.81

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.

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.