



2015

Visitor Satisfaction Monitoring Report

Second Quarter
(April – June)



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INTRODUCTION

This quarterly monitoring report presents selected preliminary statistics from the second quarter of the 2015 Visitor Satisfaction and Activity (VSAT) Survey. The survey measures the opinions of visitors from six Major Market Areas (MMAs): U.S. West, U.S. East, Japan, Canada, Europe and Oceania, regarding their satisfaction with Hawai'i as a visitor destination.

The VSAT report highlights survey respondents' evaluation of their vacation experience, including: overall satisfaction with their most recent vacation to Hawai'i, trip expectations, likelihood to recommend Hawai'i, likelihood to revisit Hawai'i, reasons for not revisiting Hawai'i, and satisfaction by island.

Condition of Visitor Industry

There were 2,131,386 visitors who came by air to the Hawaiian Islands in the second quarter (April – June) of 2015, an increase of 6.1 percent compared to the second quarter of 2014. Arrivals from U.S. West rose 8.9 percent to 935,175 visitors while U.S. East arrivals grew 6.2 percent to 473,722 visitors. Japanese arrivals were up slightly (+0.9%) to 329,638 visitors. However, Canadian arrivals of 90,596 represented a 5.6 percent drop compared to a year ago. Arrivals from Oceania increased 7.4 percent to 104,689 visitors. There were 33,229 visitors from Europe, which was a 4.6 percent growth from the second quarter of 2014. The average length of stay for all visitors to the state was 9.61 days, compared to 8.94 days in same quarter last year.

Arrivals increased on O'ahu (+4.3% to 1,324,440 visitors), Maui (+6.6% to 637,164 visitors), Hawai'i Island (+8.2% to 369,084 visitors) and Kaua'i (+4.7% to 299,163) compared to the second quarter of 2014.

VISITOR SATISFACTION RATINGS

Visitor satisfaction is an important indicator of industry performance. Because it is based on visitor evaluations, it provides vital feedback concerning how well services are delivered in Hawai'i. Satisfying visitors' needs and expectations encourages return trips to the islands. Satisfied customers also develop a fondness for the destination and tend to share their favorable assessment with others. Figure 1 Overall Ratings of Trip, shows the percent of respondents who rated their trip as **excellent** (7 or 8, on an 8-point scale). The majority of visitors from the six MMAs continued to give the highest marks for their overall experience in Hawai'i.

Figure 1: Overall Rating of Trip

(Percentage of respondents who rated their most recent trip "excellent" by MMA)

MMA	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
U.S. West	75	82	82	80	82	82	82	81	83	83
U.S. East	80	86	89	85	82	85	84	84	88	89
Japan	69	69	74	69	63	69	74	69	69	70
Canada	81	86	88	83	80	84	86	86	83	82
Europe	87	88	83	81	77	82	91	85	86	87
Oceania	85	79	76	74	77	79	79	73	81	78

P=Preliminary

In the second quarter of 2015, close to 90 percent of U.S. East and European respondents, about 80 percent of U.S. West, Canadian and Oceania respondents, and 70 percent of Japanese respondents, rated their most recent trip to Hawai'i as excellent. Ratings increased from European (+5 points) and U.S. East (+4 points) respondents compared to the second quarter of 2014.

Figure 2: Overall Rating of Trip

(Percentage of visitors who rated their most recent trip as "excellent" by MMA, 3-month moving average)

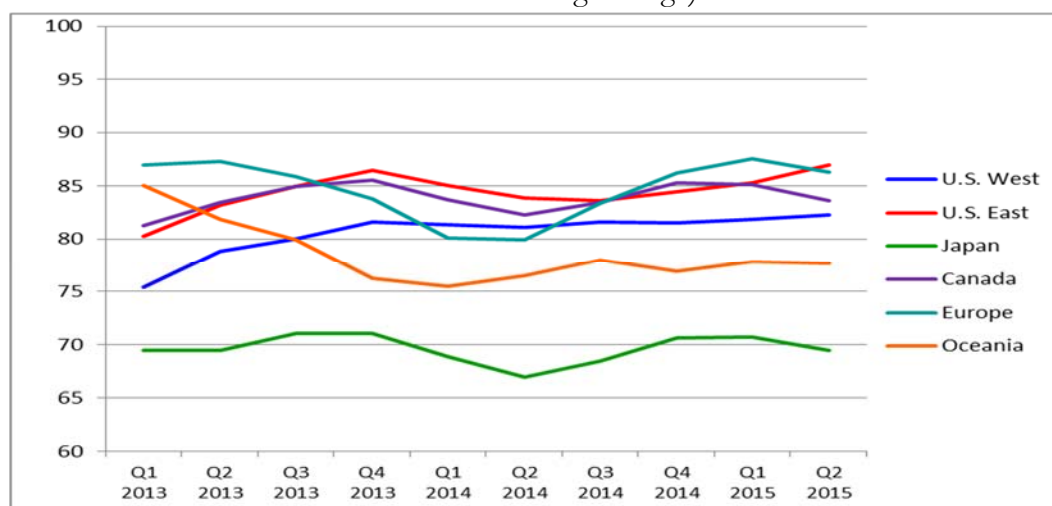


Figure 2 shows the trend lines for overall satisfaction of respondents in each MMA. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which is represents the calculated average of first and second 2013 quarter ratings for each MMA.

Overall satisfaction ratings by U.S. West respondents have been fairly consistent since the fourth quarter of 2013, resulting in a flat trend line. Ratings by U.S. East respondents have been trending upward since the third quarter of 2014. The trend lines for Japanese, Canadian and European respondents, were down slightly in the second quarter of 2015 after increases in previous quarters.

Exceeded Expectations

Visitors' satisfaction is largely influenced by the level of service they received and by visitors' own needs, interests, and expectations. Therefore, it is important to measure how well the destination is able to provide the expected experience. Overall, Hawai'i's ability to *exceed expectations* continues to be strong and consistent. Few visitors (3% or less) felt that Hawai'i "did not meet their expectations" at all.

Figure 3: Trip Exceeds Expectations

(Percentage of visitors who said this trip "Exceeded Expectations" by MMA)

MMA	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
U.S. West	37	39	41	36	33	34	38	34	36	38
U.S. East	44	51	53	47	45	53	51	46	43	52
Japan	31	29	35	33	29	31	35	36	34	34
Canada	36	43	51	41	35	46	54	39	37	45
Europe	48	51	53	46	48	40	55	52	56	54
Oceania	44	40	38	38	38	33	37	40	43	40

P=Preliminary

In the second quarter of 2015, 54 percent of European respondents said their recent trip to Hawai'i exceeded expectations. This was an increase of 14 points compared to the second quarter of 2014. Ratings from Oceania and U.S. West visitors improved by 7 points and 4 points, respectively.

Figure 4: Trip Exceeds Expectations

(Percentage of visitors who said this trip “Exceeded Expectations” by MMA, 3-month moving average)

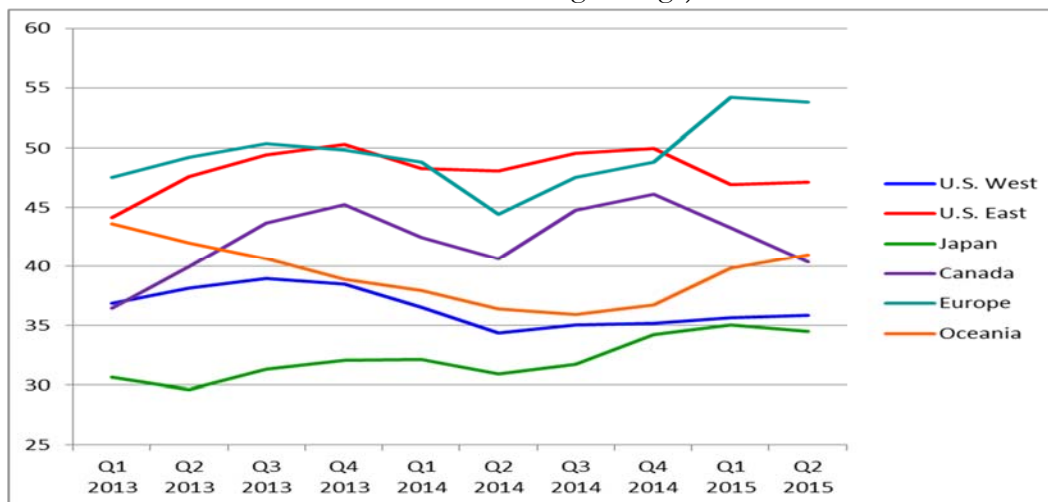


Figure 4 shows the longer-range pattern of change for this measure of satisfaction. Overall, scores on the “exceeding expectations” satisfaction indicator tend to be lower than typical scores on the other satisfaction indicators. “Exceeding expectations” is a higher standard for satisfaction, and, over the last ten quarters, between 30 and 55 percent of all respondents have chosen the highest rating for this item.

Ratings by Japanese and European respondents have stabilized in the first and second quarter of 2015 following increases in 2014. Ratings from U.S. West respondents have been consistent and the trend line has been flat since the second quarter of 2014. Trend lines for U.S. East and Canadian respondents had similar patterns of fluctuation until the second quarter of 2015, when Canadian ratings trended down while U.S. East ratings stabilized. Ratings by respondents from Oceania have been trending upward since the third quarter of 2014.

Very Likely to Recommend Hawai'i

Visitors who are highly satisfied with their trip are more likely to recommend their destination to friends and family. Relatively high percentages of visitors to Hawai'i have reported that they would be **very likely to recommend** this destination to others. Less than 4 percent of visitors from each market were “not too likely” or “not at all likely” to recommend Hawai'i.

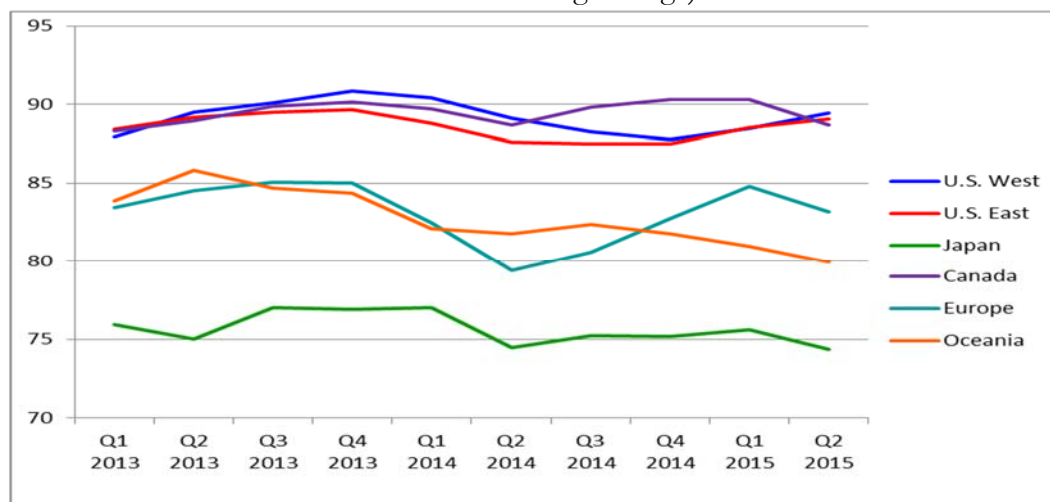
Figure 5: Very Likely to Recommend Hawai'i to Friends and Relatives
(Percentage of visitors who are “Very Likely” to recommend Hawai'i by MMA)

MMA	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
U.S. West	88	91	91	90	90	87	88	88	90	91
U.S. East	88	90	90	89	87	87	88	87	90	90
Japan	76	74	81	76	74	73	78	74	75	74
Canada	88	90	92	89	88	89	93	90	89	88
Europe	83	86	86	83	78	77	87	84	83	82
Oceania	84	88	83	83	81	82	85	79	79	82

P=Preliminary

Figure 5 shows a stable pattern of willingness to recommend Hawai'i by respondents from most visitor markets between the second quarters of 2014 and 2015. Ratings by European respondents improved 5 points over second quarter 2014.

Figure 6: Very Likely to Recommend Hawai'i to Friends and Relatives
(Percentage of visitors who are “Very Likely” to recommend Hawai'i by MMA, 3-month moving average)



U.S. and Canadian respondents continued to show the highest overall willingness to recommend Hawai'i. Respondents from Oceania and Europe provided mid-range ratings of willingness to recommend. Japan continued to report the lowest willingness to recommend Hawai'i to friends and family. Trend lines for Canadian, European, Oceania and Japanese respondents slowed slight decreases in recent quarters while ratings by U.S. West and U.S East respondents were trending up.

Likely to Revisit Hawai'i in the Next Five Years

The satisfaction indicator *Likelihood to Revisit Hawai'i* is useful in estimating future demand and predicting numbers and characteristics of repeat visitors.

Figure 7: Very Likely to Revisit Hawai'i in the Next Five Years

(Percentage of visitors who are "Very Likely" to revisit Hawai'i in the next five years by MMA)

MMA	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
U.S. West	79	77	74	78	78	72	74	79	79	76
U.S. East	56	50	51	55	55	48	52	54	61	52
Japan	57	55	60	56	47	52	57	47	50	52
Canada	64	60	56	66	64	61	55	66	63	57
Europe	45	33	36	42	34	34	37	40	52	41
Oceania	47	55	51	50	51	47	53	51	57	54

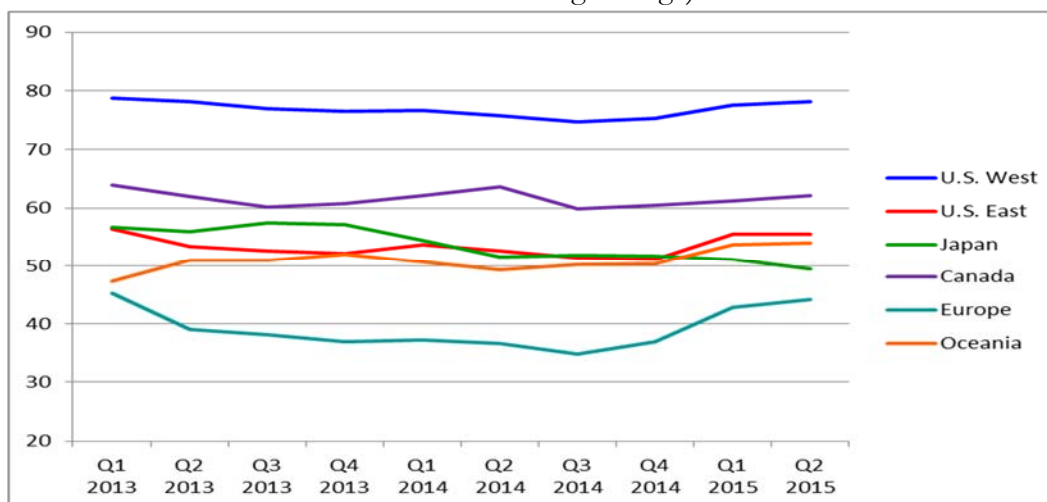
P=Preliminary

Three out of four U.S. West respondents in the second quarter of 2015 said that they would very likely revisit Hawai'i in the next five years. This was a 4-point increase from the second quarter of 2014. Ratings by U.S. East visitors also improved 4 points to 52 percent.

Over half of Japanese, Canadian and Oceania respondents would very likely revisit Hawai'i in the next five years. Ratings by Oceania respondents rose 7 points compared to the second quarter of 2014. Among European respondents, 41 percent said that they will revisit, which was also an improvement of 7 points from a year ago.

Figure 8: Very Likely to Revisit Hawai'i in the Next Five Years

(Percentage of visitors who are “Very Likely” to revisit Hawai'i in the next five years by MMA
3-month moving average)



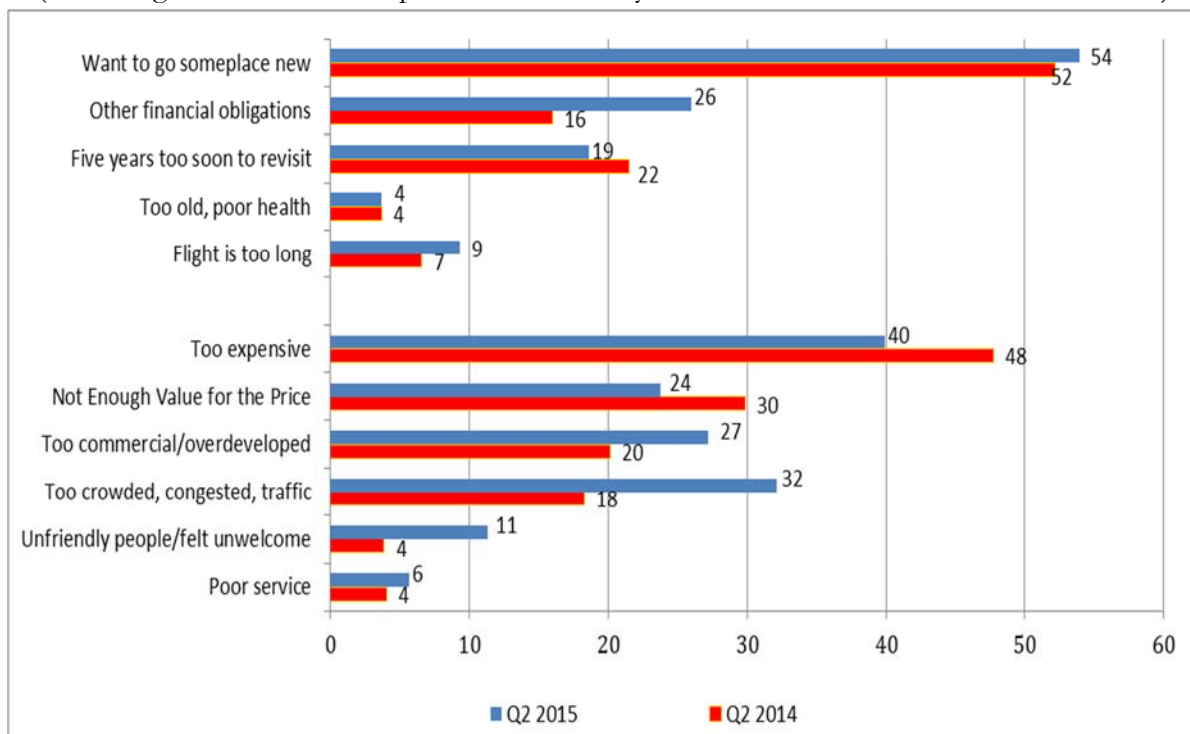
The pattern of change for the likelihood of return to Hawai'i in the next five years is shown in Figure 8. Ratings for these measures of satisfaction have a much wider range (35-79 points) than other measures of satisfaction. For U.S. West, Canada and Europe, trend lines have been relatively flat through 2014 and increased slightly in the second quarter of 2015. The trend line for Japan has been slowly declining in the first and second quarters of 2015.

Reasons for Not Revisiting Hawai'i in the Next Five years

Visitors who said that they would *not likely revisit Hawai'i* in the next five years cited many reasons for that decision. Understanding those reasons allows us to distinguish dissatisfied visitors (i.e., those who are *unwilling* to return) from those who are unable to return due to health, financial, or other constraints.

In Figures 9 through 14, visitors' reasons for not returning were separated into two groups: “barriers to returning” and “performance issues.” Barriers appear at the top of each chart and performance issues are at the bottom. “Not enough value for the price” is similar to “too expensive,” but is a complaint about the quality of the product rather than its price tag. Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were “not likely to revisit Hawai'i.”

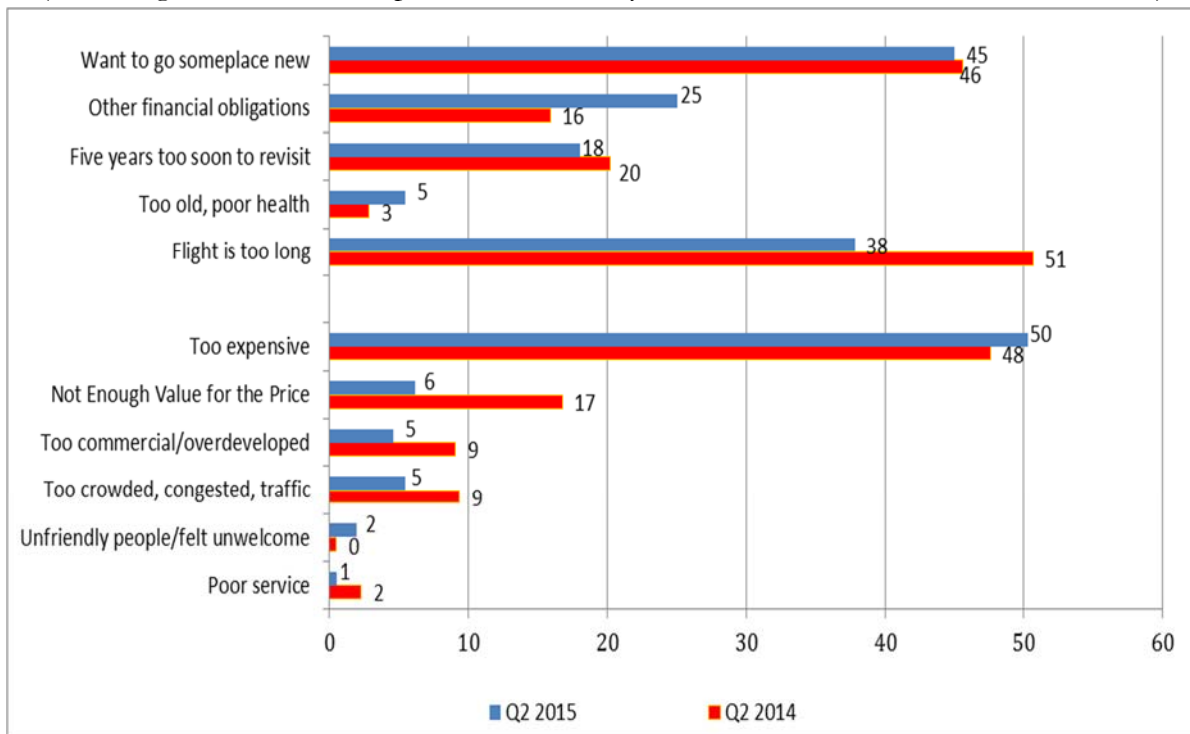
Figure 9 Reasons for Not Revisiting Hawai'i in Next Five Years – U.S. West
(Percentage of U.S. West Respondents not Likely to Revisit Hawai'i in the Next Five Years)



About half of U.S. West respondents who indicated they were not likely to return in the next 5 years cited the desire to go someplace new (54%) and 19 percent said that five years is too soon to revisit. More respondents mentioned other financial obligations (+10 points to 26%) compared to the second quarter of 2014.

In terms of performance issues, fewer U.S. West respondents said that they will not be returning because Hawai'i is too expensive (-8 points to 40%) or that there is not enough value for the price (-6 points to 24%). However, more respondents said that Hawai'i is too crowded/congested (+14 points to 32%), too commercial/overdeveloped (+7 points to 27%), and cited unfriendly people/felt unwelcome (+7 points to 11%) compared to a year ago.

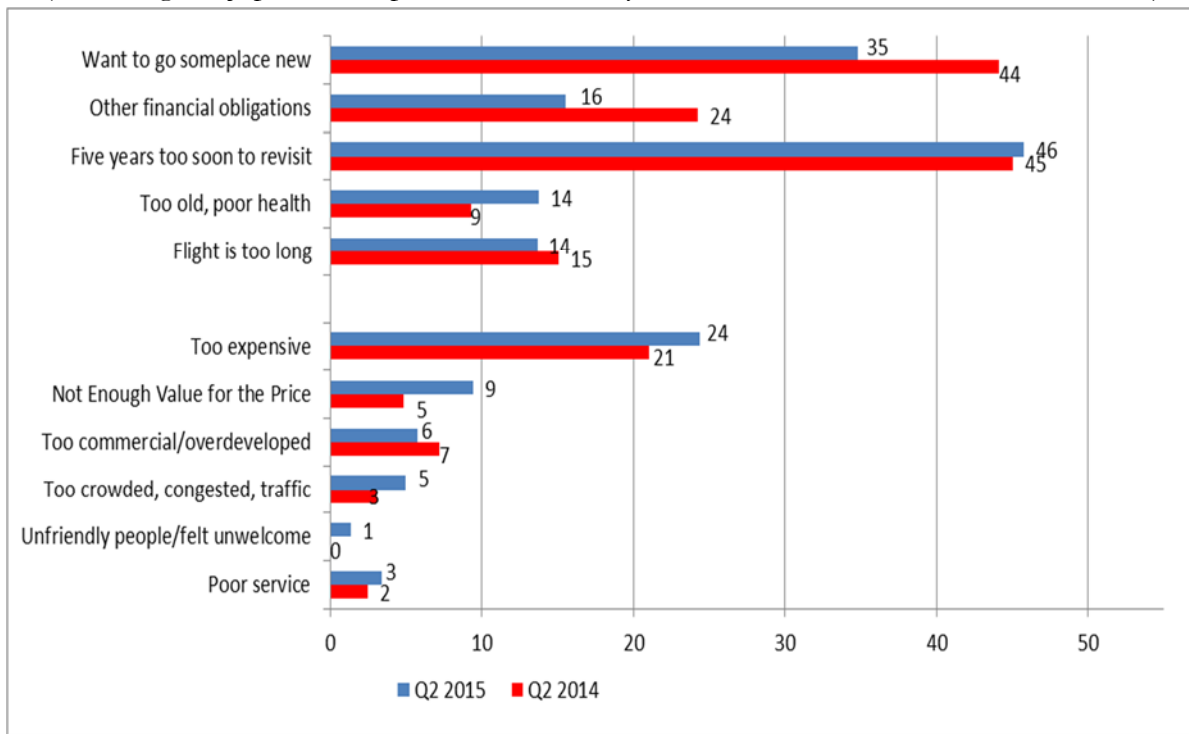
Figure 10: Reasons for Not Revisiting Hawai'i in Next Five Years – U.S. East
(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)



For U.S. East respondents, the most frequently cited barrier from returning was the desire to go someplace new (45%). Fewer respondents said that the flight is too long (-13 points to 38%) but more mentioned other financial obligations (+9 to 25%) compared to last year.

Half of U.S. East respondents who will not revisit said that Hawai'i is too expensive. Though only 6 percent said that there is not enough value for the price compared to 17 percent in the second quarter of 2014.

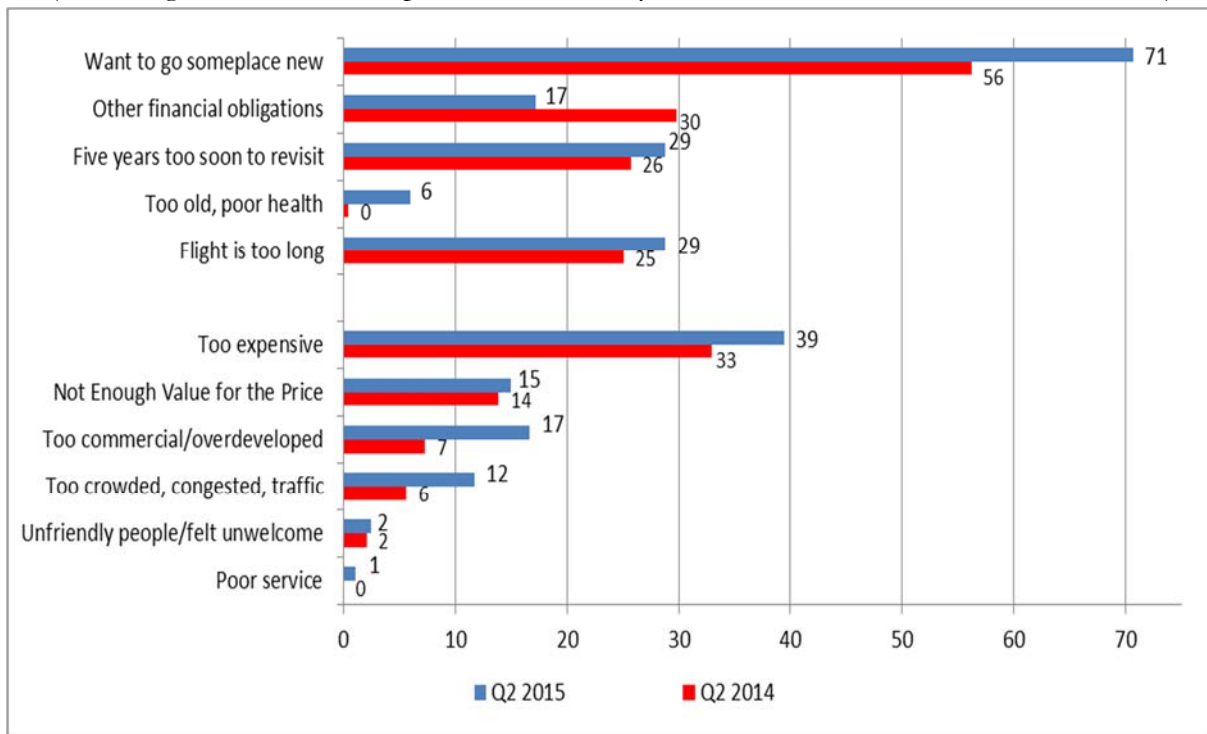
Figure 11: Reasons for Not Revisiting Hawai'i in Next Five Years – Japan
(Percentage of Japanese Respondents not Likely to Revisit Hawai'i in the Next Five Years)



Japanese respondents in the second quarter of 2015 continued to cite more barriers than performance-related issues as reasons for not returning. Close to half of the respondents said that five years is too soon to revisit (46%). Fewer respondents said that they would rather visit some place new (-9 points to 35%), or cited other financial obligations (-8 points to 16%), but more mentioned old age and poor health (+5 points to 14%).

One out of four Japanese respondents said that Hawai'i is too expensive to revisit (24%). The percentage of those who felt that there was not enough value for the price (9%) remained fairly small, but it was up 4 points from the second quarter of 2014.

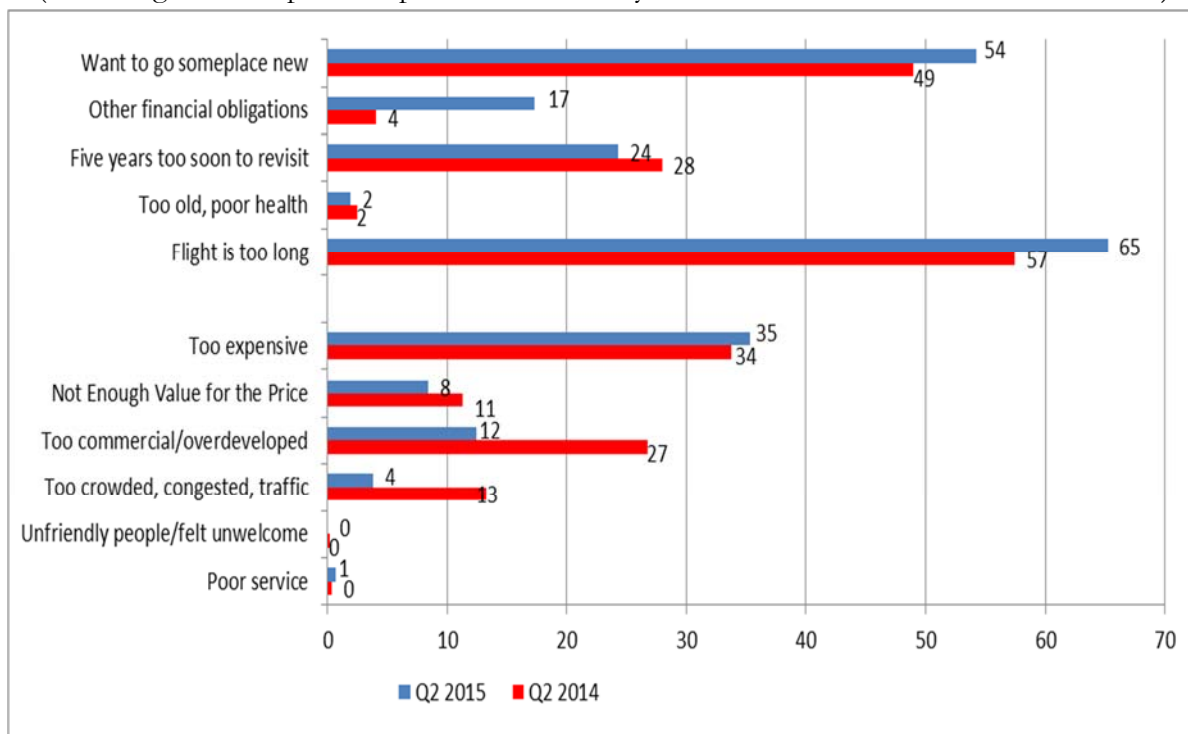
Figure 12: Reasons for Not Revisiting Hawai'i in Next Five Years – Canada
(Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)



A much higher percentage of Canadian respondents cited the desire to visit some place new (71%) as a barrier to revisiting Hawai'i compared to the second quarter of 2014 (56%). The flight is too long (29%) and five years is too soon to revisit (29%) were other reasons provided. Fewer respondents cited other financial obligations (-13 points to 17%) compared to a year ago.

The primary performance-related issue was the high cost (+6 points to 39%) while 15 percent of the respondents felt that there is not enough value for the price. More Canadian visitors said that Hawai'i is too commercial/overdeveloped (+10 points to 17%) and too crowded/congested (+6 points to 12%) compared to last year.

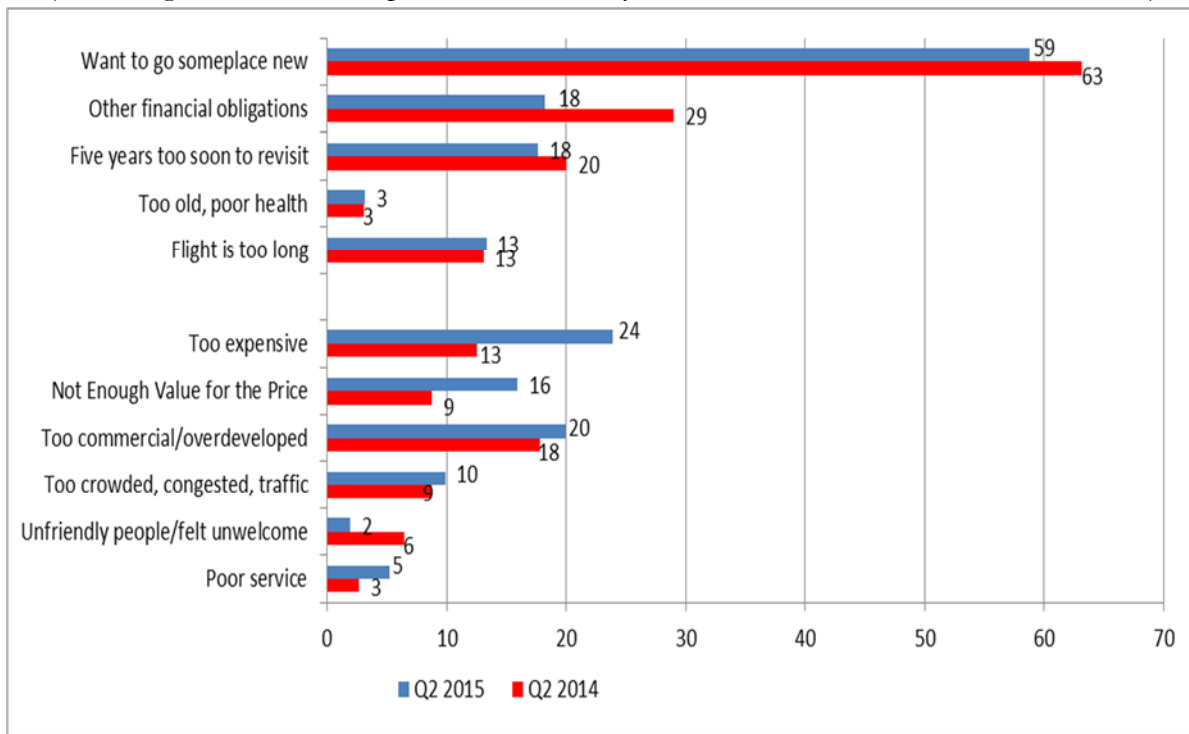
Figure 13: Reasons for Not Revisiting Hawai'i in Next Five Years – Europe
(Percentage of European Respondents not Likely to Revisit Hawai'i in the Next Five Years)



For European visitors, the primary reason for not returning to the islands continued to be the long flight (+8 points to 65%). More than half of the respondents cited the desire to go someplace new (54%), up from 49 percent in the second quarter of 2014. A much higher percentage of European respondents mentioned other financial obligations (+13 points to 17%) as a barrier to returning.

Hawai'i is too expensive (35%) was the most mentioned performance-related reason for not returning. However, only 8 percent said there was not enough value for the price they paid. Fewer European respondents said that Hawai'i is too commercial/overdeveloped (-15 points to 12%) and too crowded/congested (-9 points to 4%) compared to a year ago.

Figure 14: Reasons for Not Revisiting Hawai'i in Next Five Years – Oceania
 (Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)



Among Oceania respondents, the most common barrier for revisiting was the desire to go someplace new (59%). Fewer respondents cited other financial obligations (-11 points to 18%). Other reasons provided were five years is too soon to revisit (18%) and the flight is too long (13%).

In terms of performance issues, more Oceania respondents said that they will not be returning because Hawai'i is too expensive (+11 points to 24%) and that there is not enough value for the price (+7 points to 16%) compared to the second quarter of 2014. Two out of ten respondents said Hawai'i is too commercial/overdeveloped (20%).

Individual Island Experience

Each island in Hawai'i has unique characteristics, activities, and products that attract different kinds of visitors and produce varied visitor experiences. Visitor industry planners use these island-specific satisfaction measurements to enhance the visitor products and services and to design communications programs. The VSAT survey asks Hawai'i visitors to rate their experience on each island they visited. Figures 15 through 24 show respondents by visitor market who rated their island experience as *excellent* over the last 10 quarters.

Figure 15: Island Experience Rated as Excellent – U.S.

(Percentage of U.S. Respondents by Island)

Island	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
O'ahu	56	57	60	57	50	55	58	52	57	58
Maui	62	73	70	67	67	71	71	69	69	72
Hawai'i Island	55	56	58	51	58	61	67	60	57	60
Kaua'i	65	72	74	63	62	75	78	72	73	73

P=Preliminary

Among U.S. respondents in the second quarter of 2015, ratings for all four islands changed very little compared to the second quarter of 2014.

Figure 16: Island Experience Rated as Excellent – U.S.

(Percentage of U.S. Respondents by Island, 3-month moving average)

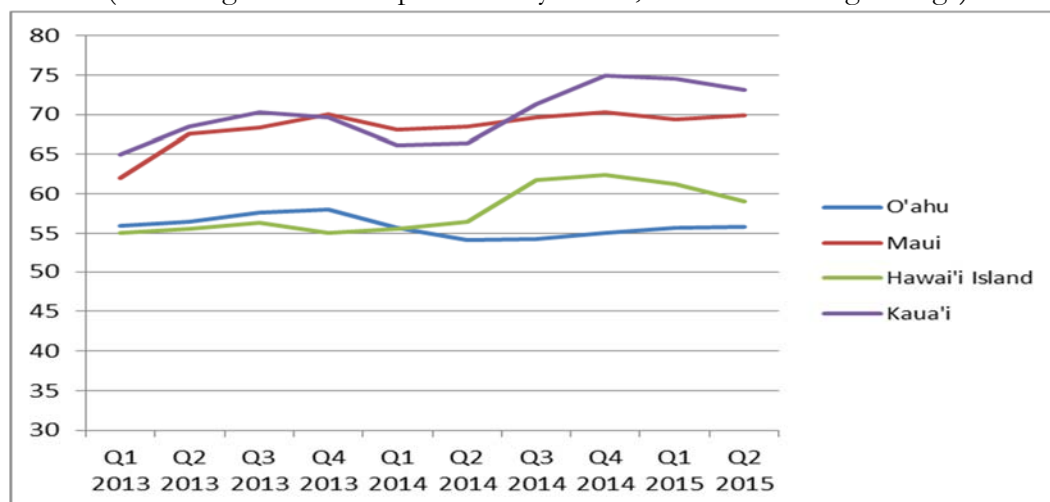


Figure 16 shows trend lines for the data in Figure 15. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which represents the calculated average of first and second quarter 2013 ratings for each MMA.

For U.S. respondents, Kaua'i and Maui consistently received higher ratings than O'ahu and Hawai'i Island. Trend lines for Maui and O'ahu have remained relatively flat. Ratings for Kaua'i and Hawai'i Island have been trending down in recent quarters after increasing in 2014.

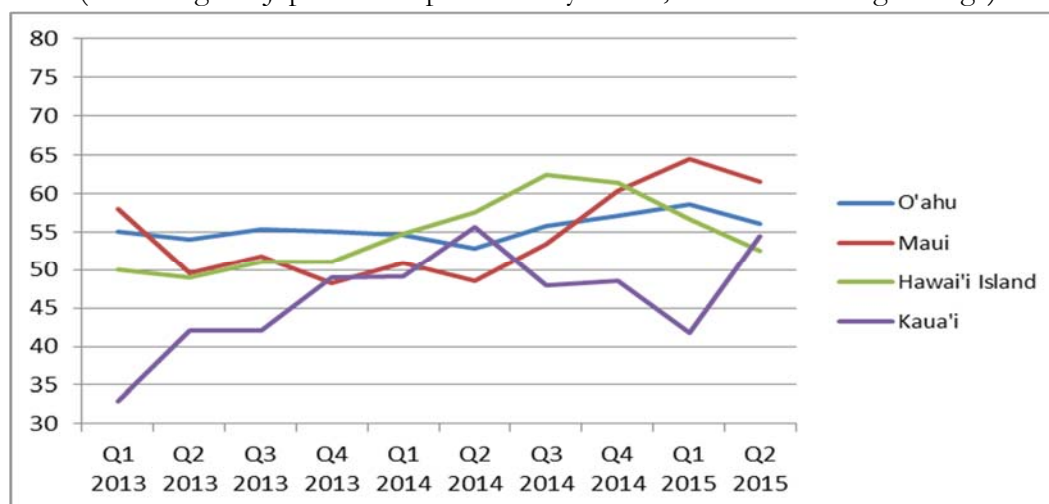
Figure 17: Island Experience Rated as Excellent – Japan
(Percentage of Japanese Respondents by Island)

Island	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
O'ahu	55	53	58	54	52	53	62	56	57	55
Maui	58	41	56	47	50	49	62	71	61	53
Hawai'i Island	50	48	55	50	59	63	64	56	49	52
Kaua'i	33	51	42	54	51	62	31	53	41	69

P=Preliminary

A higher percentage of Japanese respondents gave excellent ratings to Kaua'i (+7 points) and Maui (+4 points) compared to the second quarter of 2014. Ratings for Hawai'i Island declined 11 points from the same period last year.

Figure 18: Island Experience Rated as Excellent – Japan
(Percentage of Japanese Respondents by Island, 3-month moving average)



Maui had the top ratings among the islands for Japanese respondents for first and second quarters 2015 even though the trend line showed a decline. O'ahu's trend line also showed a dropped after increases in previous quarters. Rating for Hawai'i Island have trended downward since the third quarter of 2014. Kaua'i's trend line has fluctuated over the last two years. The increase in second quarter 2015, boosted Kaua'i's rating above Hawai'i Island's rating for the first time in the last 10 quarters.

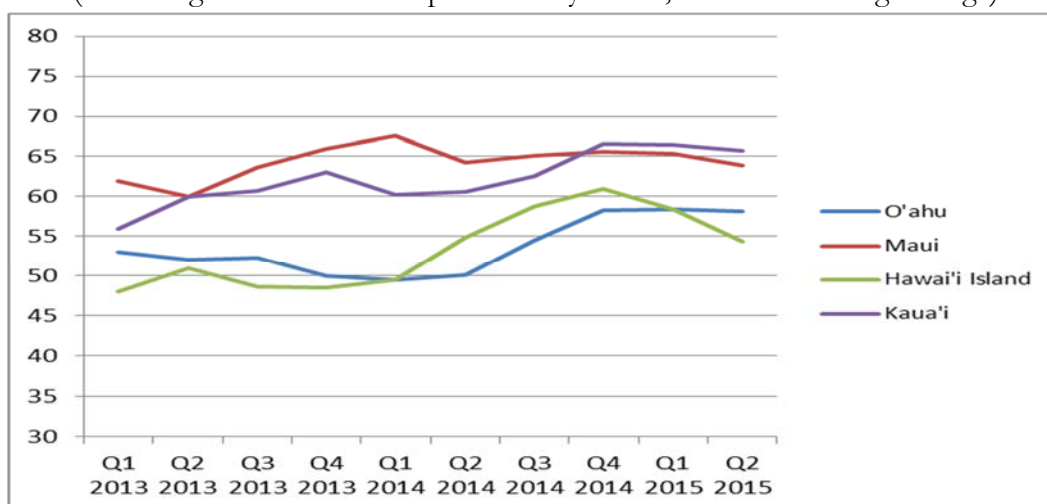
Figure 19: Island Experience Rated as Excellent – Canada
(Percentage of Canadian Respondents by Island)

Island	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
O'ahu	53	51	53	46	49	55	59	60	56	58
Maui	62	58	71	69	63	61	72	64	60	67
Hawai'i Island	48	54	44	48	57	60	60	63	53	47
Kaua'i	56	64	62	63	56	63	69	68	63	67

P=Preliminary

More Canadian respondents in the second quarter of 2015 gave excellent ratings to Maui (+6 points) compared to a year ago. In contrast, ratings for Hawai'i Island dropped 13 points.

Figure 20: Island Experience Rated as Excellent – Canada
(Percentage of Canadian Respondents by Island, 3-month moving average)



The trend lines showed that Canadian respondents continued to give higher ratings to Kaua'i and Maui and lower ratings to Hawai'i Island and O'ahu. Trend lines for Maui, Kaua'i and O'ahu have been fairly flat in recent quarters. The trend line for Hawai'i Island has declined since the first quarter of 2015.

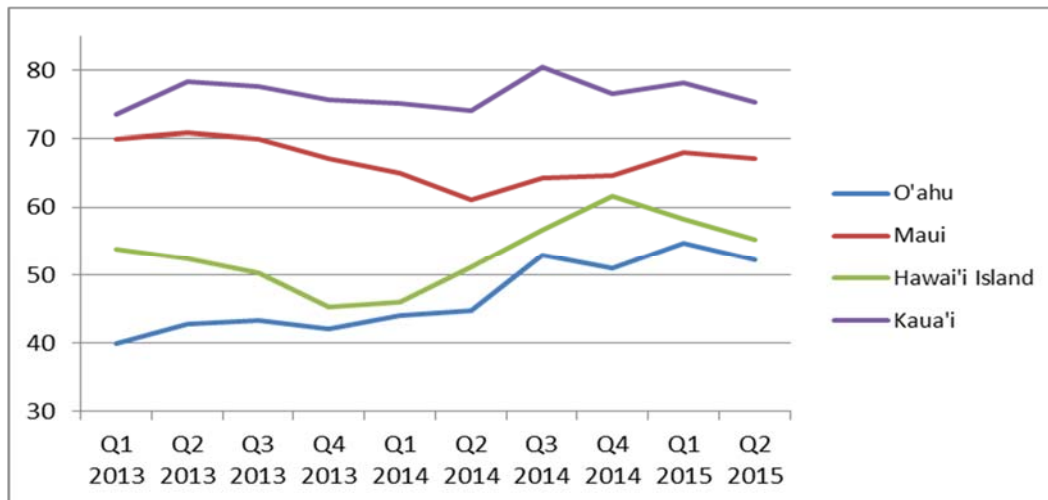
Figure 21: Island Experience Rated as Excellent – Europe
(Percentage of European Respondents by Island)

Island	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
O'ahu	40	46	44	36	51	46	61	46	57	53
Maui	70	72	68	62	65	57	71	66	67	69
Hawai'i Island	54	51	46	39	53	62	55	68	52	46
Kaua'i	74	83	76	68	81	73	87	70	78	79

P=Preliminary

A higher percentage of European respondents gave excellent ratings to Maui (+12 points), O'ahu (+7 points) and Kaua'i (+6 points) compared to the second quarter of 2014. However, ratings for Hawai'i Island declined 16 points from the same period last year.

Figure 22: Island Experience Rated as Excellent – Europe
(Percentage of European Respondents by Island, 3-month moving average)



European respondents continued to rate Kaua'i the highest and O'ahu the lowest among the islands. Since peaking in the third quarter of 2014, Kaua'i's trend line has been fluctuating and dropped in the second quarter of 2015. After increases in the first quarter of 2015, trend lines for Maui and O'ahu also declined slightly in second quarter 2015. Ratings for Hawai'i Island, which rose over the course of 2014 have been trending down in the last two quarters.

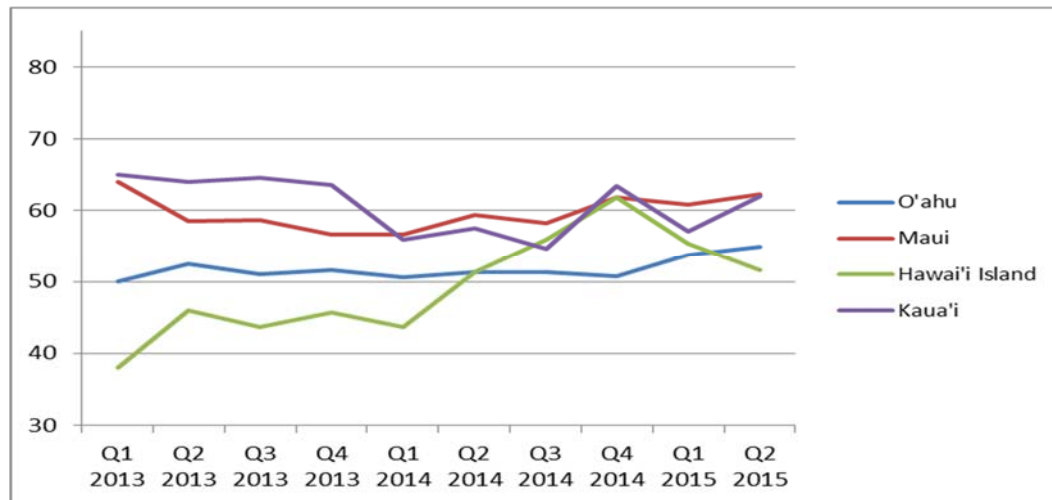
Figure 23: Island Experience Rated as Excellent – Oceania
(Percentage of Oceania Respondents by Island)

Island	2013				2014				2015P	
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015
O'ahu	50	55	48	52	52	50	52	50	59	55
Maui	64	53	59	58	53	67	55	64	64	59
Hawai'i Island	38	54	39	44	48	62	58	66	42	46
Kaua'i	65	63	66	62	40	71	53	66	52	68

P=Preliminary

The percentage of excellent ratings from Oceania respondents for O'ahu (+5 points) were higher compared to the second quarter of 2014, but ratings for Hawai'i Island (-16 points) and Maui (-8 points) declined.

Figure 24: Island Experience Rated as Excellent – Oceania
(Percentage of Oceania Respondents by Island, 3-month moving average)

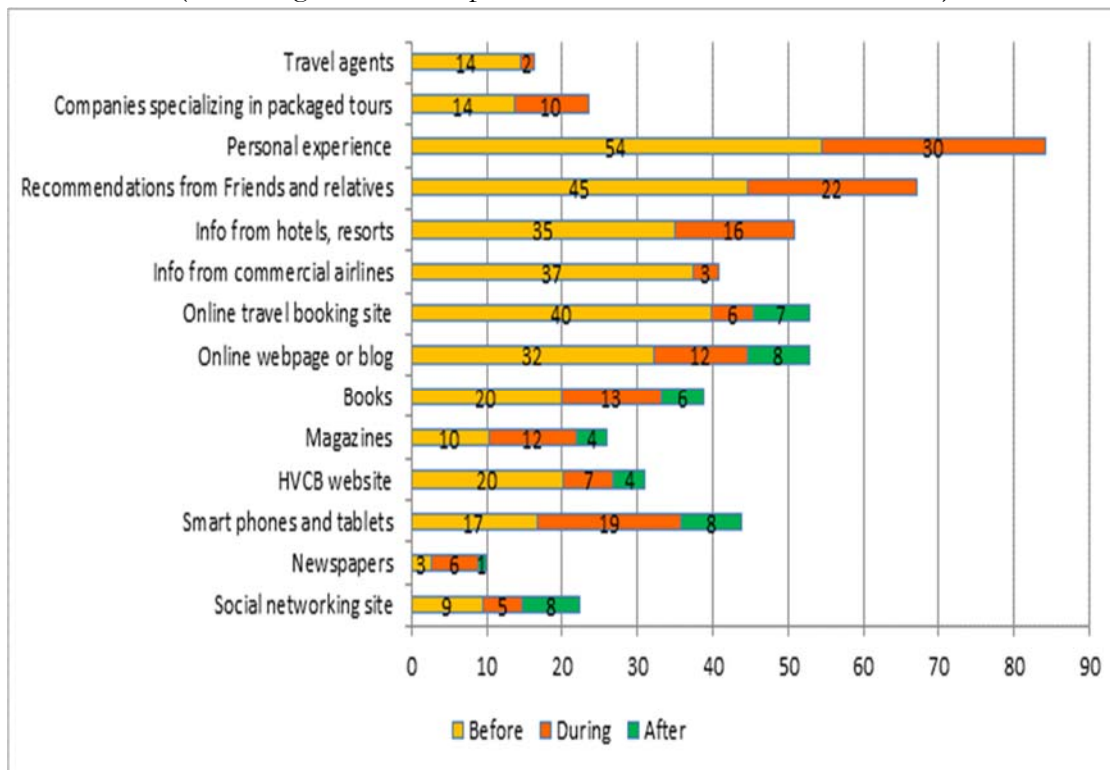


Ratings for O'ahu and Maui have been slowly trending upwards in recent quarters. Kaua'i's rating also increased and matched Maui's rating in second quarter 2015. Ratings for Hawai'i Island have been declining and was the lowest in second quarter 2015.

Sources of Information used for Trip Planning

Visitors to Hawai'i used a wide variety of resources to plan their trip to the islands. This section shows the sources of information used by respondents who came in the second quarter of 2015.

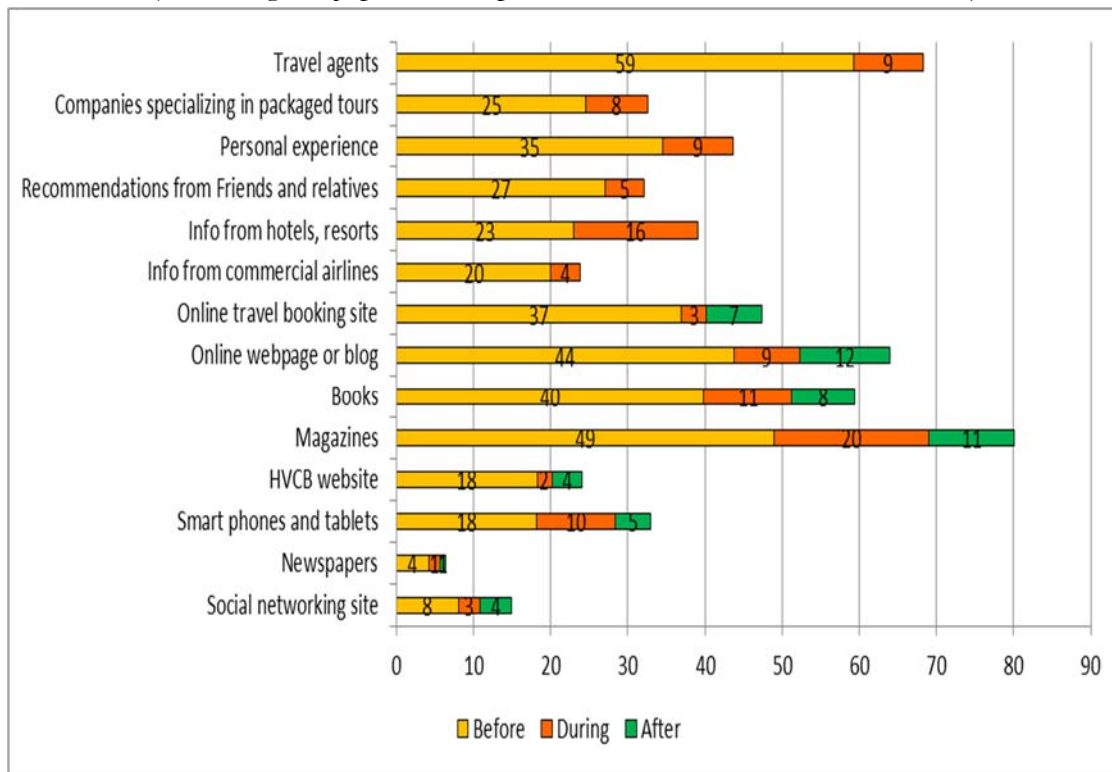
Figure 25: Sources of Information about Hawai'i – U.S.
(Percentage of U.S. Respondents who used these Information)



U.S. Visitors: This group of respondents relied the most on personal experience and recommendations from friends and relatives in trip planning before their arrival and during their stay in the islands. Online travel booking sites (40%), information from airlines (37%), hotels and resorts (35%), online webpage or blog (32%), guide books (20%), HVCB website (20%), smartphones and tablets (17%) were also heavily utilized in their trip planning. Usage of travel agents was fairly low at 14 percent.

During their trip, many U.S. respondents used smartphones or tablets (19%), information from hotels, resorts (16%), guide books (13%), magazines (12%) and online webpages or blogs (12%) to find information about Hawai'i.

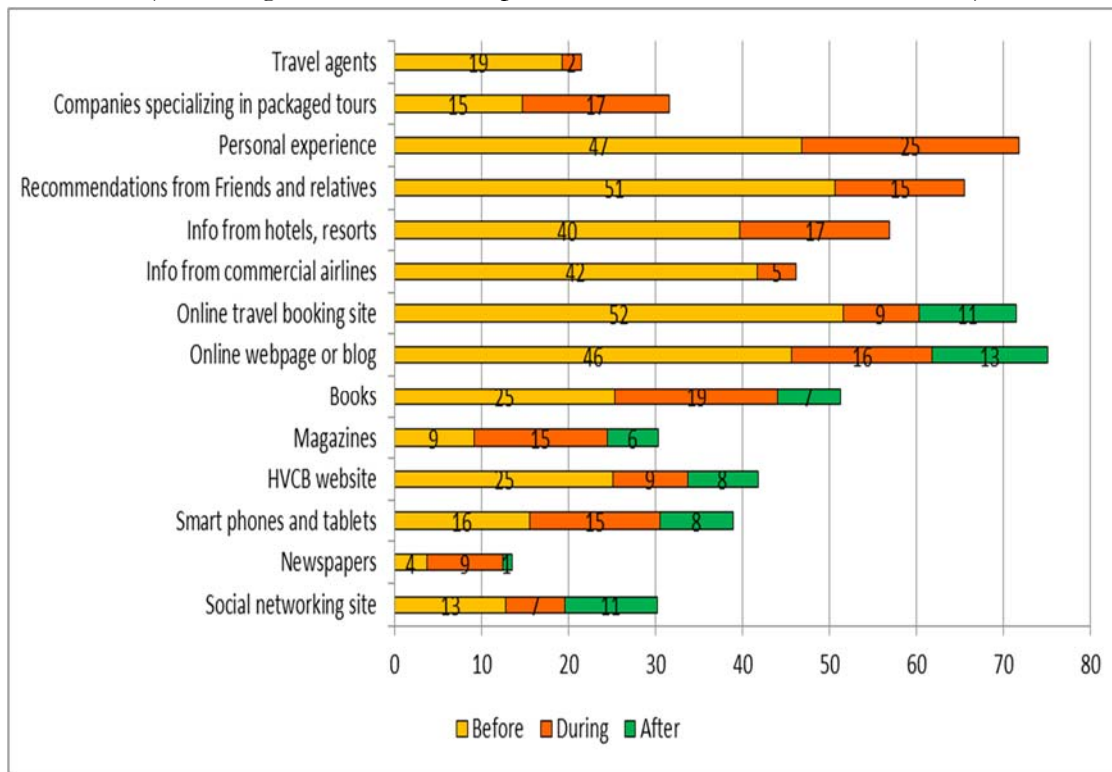
Figure 26: Sources of Information about Hawai'i – Japan
(Percentage of Japanese Respondents who used these Information)



Japanese visitors: Japanese respondents in the second quarter of 2015 relied most heavily on travel agents (59%) in planning their trip to the islands. Magazines (49%), guide books (40%), and online webpages or blogs (37%) were also popular in their trip planning.

While their trip is in progress, Japanese respondents used magazines (20%), information from hotels and resorts (16%), guide books (11%) and smartphones and tablets (10%) to access information about Hawai'i.

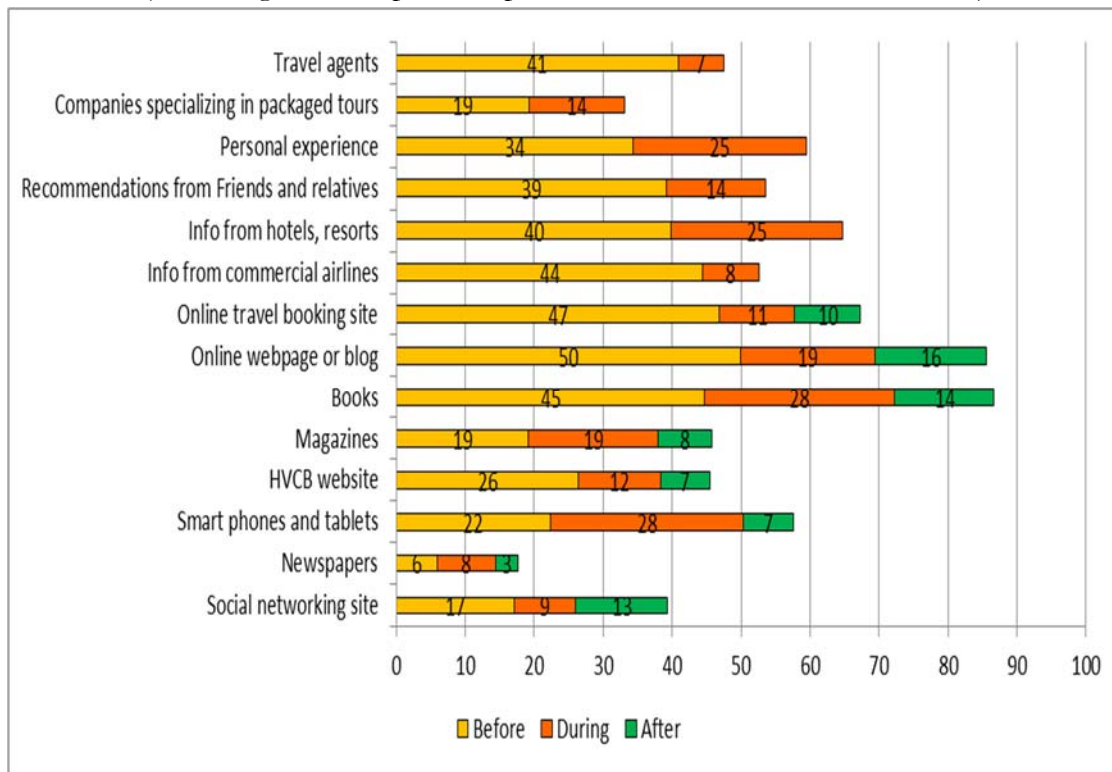
Figure 27: Sources of Information about Hawai'i – Canada
(Percentage of Canadian Respondents who used these Information)



Canadian visitors: Before their arrival, Canadian respondents who visited in the second quarter of 2015 most frequently used online travel booking site (52%) and recommendations from friends or relatives (51%) when planning for their trip. In addition, many Canadians relied on personal experience (47%), online webpages or blogs (46%), information from airlines (42%), and information from hotels and resorts (40%). Only 19 percent used travel agents.

During their trip, many Canadian respondents relied on their personal experience (25%). Some used guide books (19%), companies specializing in packaged tours (17%), information from hotels and resorts (17%), online webpages or blogs (16%), recommendations from friends or relatives (15%), smartphones or tablets (15%) and magazines (15%) and as resources.

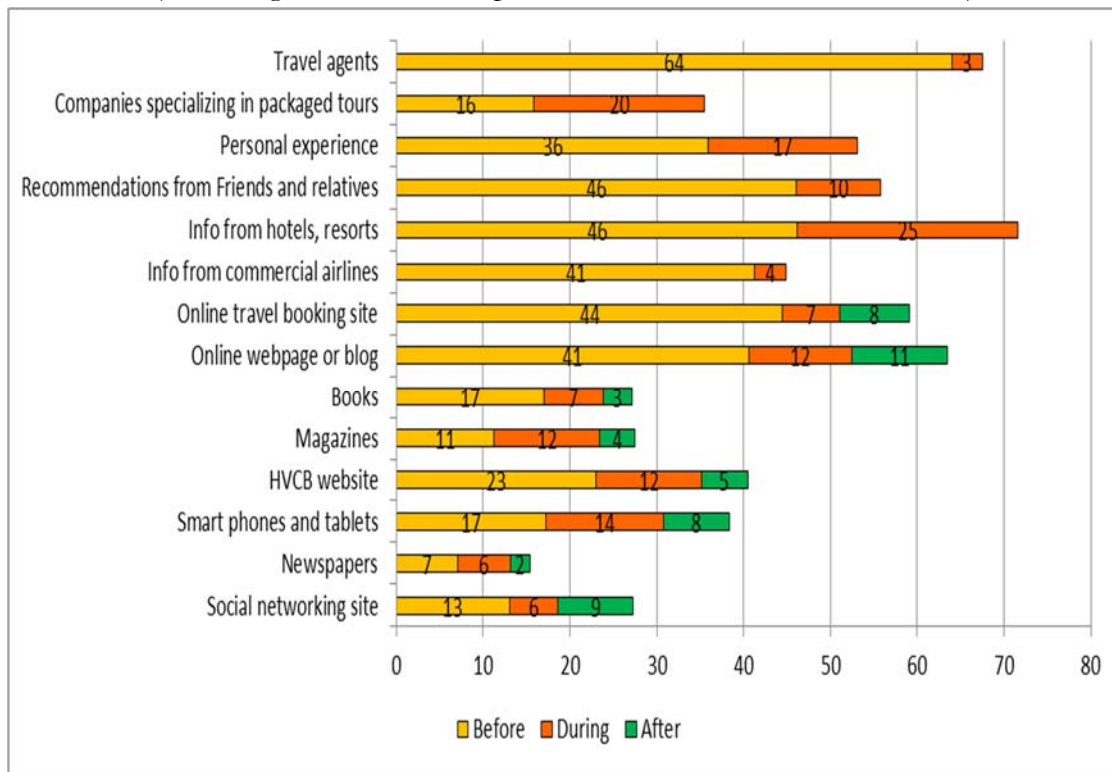
Figure 28: Sources of Information about Hawai'i – Europe
(Percentage of European Respondents who used these Information)



European Visitors: Among European respondents who came in the second quarter of 2015, online webpage or blog about Hawai'i (50%) was the most frequently used source for trip planning. Online travel booking site (47%), guide books (45%) and information from airlines (44%) were also popular resources. Four out of ten respondents used travel agent (41%), information from hotels and resort (40%) and recommendations from friends and relatives (39%).

Many European respondents used guide books (28%), smart phones and tablets (28%), information from hotels and resort (25%) and relied on their personal experience (25%) during their trip. A few respondents also used online webpages or blogs (16%), guide books (14%) and social networking site (13%) to seek information about Hawai'i after their trip.

Figure 29: Sources of Information about Hawai'i – Oceania
(Percentage of Oceania Respondents who used these Information)



Oceania Visitors: Respondents from Oceania used travel agents (64%) as their main source for trip planning before arriving to Hawai'i. Recommendations from family and friends (46%), information from hotels and resorts (46%), online travel booking sites (44%), information from airlines (41%) and online webpages or blogs (41%) and were also important planning tools.

During their trip, many visitors from Oceania used information from hotels or resorts (25%) and package tour companies (20%) and as resources about Hawai'i.

SURVEY METHODS

The Visitor Satisfaction and Activity Survey is a survey mailed to visitors who recently completed a trip to Hawai'i. Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Visitors may respond by mail or Internet.

Quarterly data are reported for visitors from six Major Market Areas (MMAs): U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other States in the Continental U.S.), Japan, Canada, Europe and Oceania. Survey forms in English are mailed to visitors from the U.S., Canada, Oceania and Europe, while visitors from Japan are mailed a Japanese language survey form. A total of 4,352 completed forms were received in the second quarter of 2015 with a margin of error of ± 1.48 percentage points at the 95 percent confidence level.

Table 10: Number of Surveys Collected
April – June 2015

MMA	Completed	Margin of Error
U.S. West	846	3.37
U.S. East	758	3.56
Japan	1,005	3.08
Canada	526	4.26
Europe	430	4.72
Oceania	787	3.49
All MMAs	4,352	1.48

Data collected in online surveys were merged with mailed survey data to form a single database for analysis. Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Results are presented only for classifications (MMA, islands visited, ports of entry, types of visitors, etc.) for which sample sizes are large enough to produce statistics with sample error estimates less than 10 points.

Data from all MMAs are reported as weighted data based on weights generated for 2014 data. The 2014 VSAT weighting system was developed to adjust for disproportionate sampling across MMAs.

For information, call the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email us at research@HawaiiTourismAuthority.org