

2015 Visitor Satisfaction

(Results from the 2015 Visitor Satisfaction Survey)

HAWAII TOURISM

AUTHORITY

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ABOUT THIS REPORT

This abbreviated report presents results from the 2015 Visitor Satisfaction (VSAT) conducted annually by the Hawai'i Tourism Authority (HTA) as part of its Tourism Research program.

The objective was to provide measurements of survey respondents' satisfaction with Hawai'i as a visitor destination. Visitors from U.S. West, U.S. East, Japan, Canada, Europe, and Oceania were surveyed. The report described visitors' evaluation of their vacation experience by investigating their reaction to events that occurred on the island on which they stayed the longest. Visitors rated their stay on four different evaluation categories – overall satisfaction, how well their experience matched their expectations, likelihood of recommending Hawai'i to others, and likelihood of returning to Hawai'i within the next five years.

AVAILABILITY OF THIS REPORT

The full VSAT report and the companion Excel workbook of 2015 VSAT data tables will be posted in October 2016, on the HTA website:

www.HawaiiTourismAuthority.org/research/reports/visitor-satisfaction.

For further information contact the HTA at (808) 973-2255.

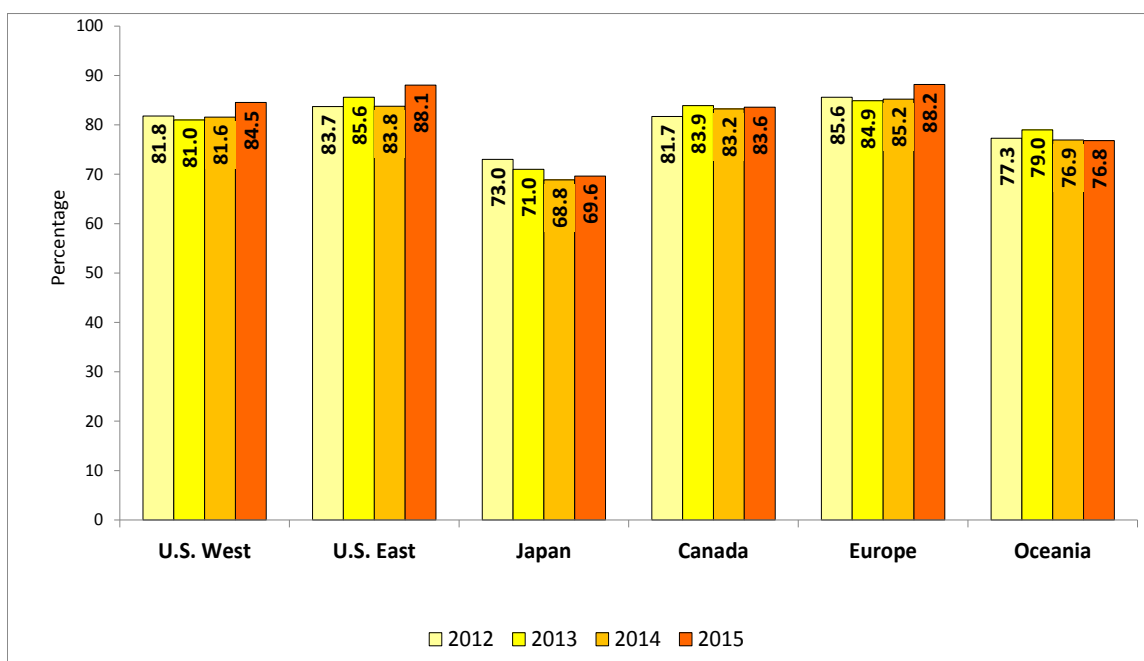
VISITOR SATISFACTION

Visitor satisfaction levels are an important indicator of visitor industry performance. They provide important feedback on how well services are delivered and how well those services fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination.

OVERALL RATING¹.

The majority of visitors in 2015 continued to give high marks for their overall experience in Hawai'i, and "excellent" ratings for several visitor markets increased compared to 2014. (Figure 1).

Figure 1: Overall Rating of Trip
(Percentage of visitors who rated most recent trip "Excellent" by MMA)



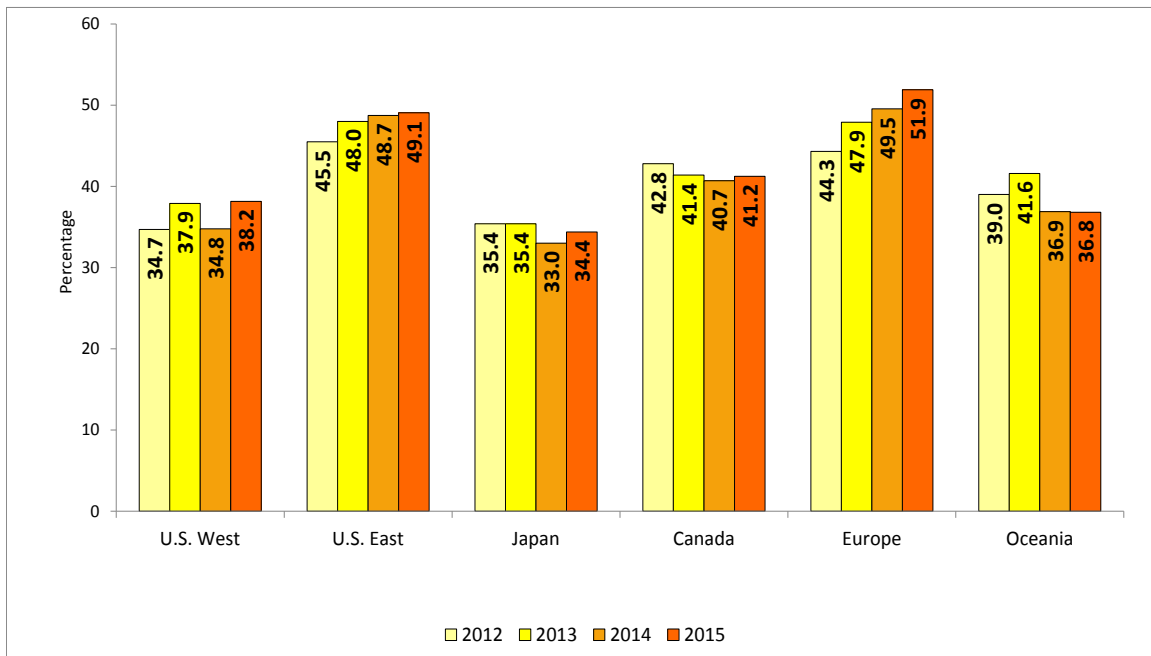
- In 2015, 88.1 percent of U.S. East respondents gave excellent ratings to their most recent trip to Hawai'i, up 4.3 points from the prior year.
- Ratings by European and U.S. West visitors rose by 3 points and 2.9 points, respectively.
- Ratings by visitors from Canada (83.6%) and Oceania (76.8%) were relatively unchanged compared to 2014.
- Ratings by Japanese visitors (69.6%) have remained stable in the last two years

¹ Percentages shown in Figure 1 are the sum of ratings of 7 and 8, divided by the total responses.

MEETING VISITOR EXPECTATIONS

Visitors' evaluation of their trip is influenced not only by the nature of the service they receive, but also by their needs, motivations, and interests. Therefore, it is important to measure how well the destination meets expectations. Hawai'i's ability to "exceed expectations" remained quite strong. Ratings by visitors from several markets increased compared to 2014, and very few respondents (less than 5%) felt that Hawai'i "did not meet their expectations" at all.

**Figure 2: Trip Exceeded Expectations
(Percentage of visitors who said this trip "Exceeded Expectations" by MMA)**

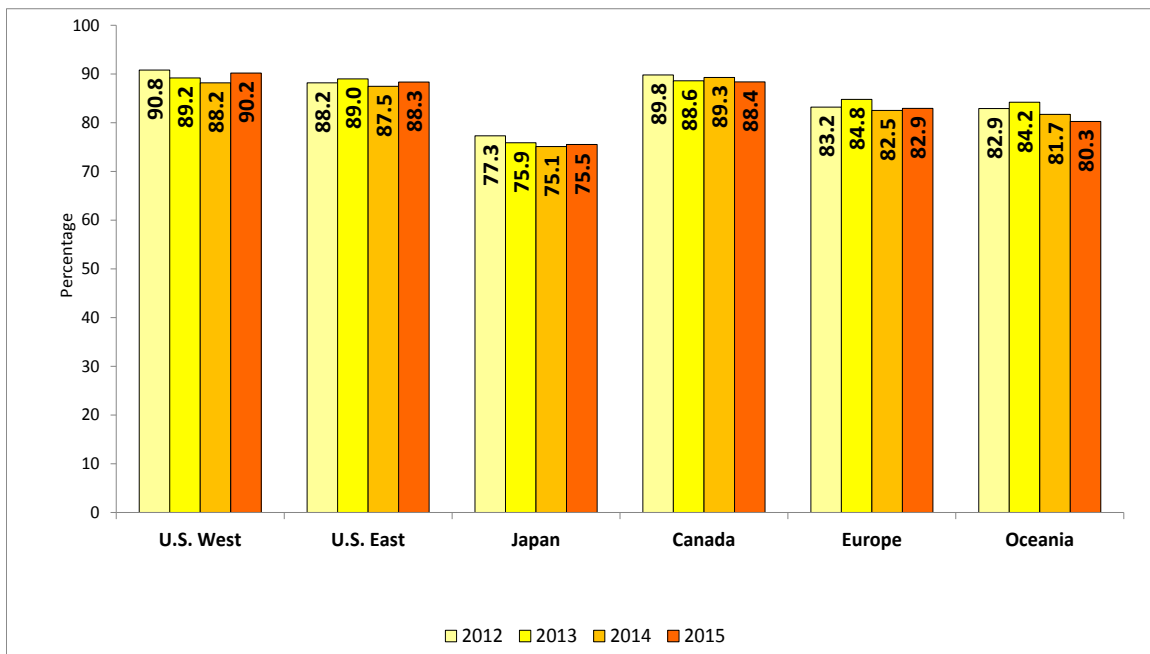


- A higher percentage of U.S. West (+3.4 points, to 38.2%) and European (+2.4 points to 51.9%) visitors felt their trip exceeded their expectations compared to 2014.
- Ratings by Japanese visitors grew slightly (+1.4 points) to 34.4 percent.
- Ratings by visitors from U.S. East (49.1%), Canada (41.2%) and Oceania (36.8%) were similar to the prior year.

LIKELIHOOD TO RECOMMEND HAWAI‘I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. Word-of-mouth is a critical aspect of Hawai‘i’s marketing efforts because these referrals create more First-Time visitors to Hawai‘i and encourage previous visitors to return. The majority of visitors surveyed in 2015 continued to respond that they would “very likely” recommend Hawai‘i to others (Figure 3). Less than 4 percent of visitors from each markets were “not too likely” or “not at all likely” to recommend Hawai‘i.

**Figure 3: Very Likely to Recommend Hawai‘i to Friends and Relatives
(Percentage of visitors “Very Likely” to recommend Hawai‘i for vacation by MMA)**

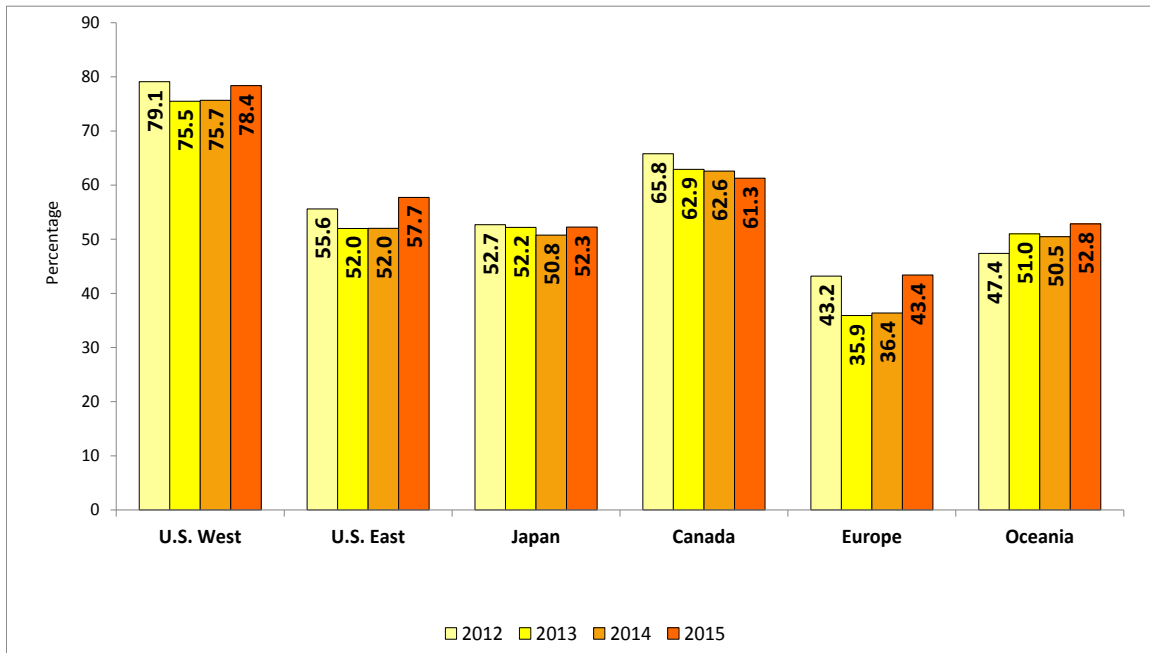


- A higher percentage of U.S. West (+2 points, to 90.2%) respondents would very likely recommend Hawai‘i compared to 2014.
- Ratings by Oceania visitors fell 1.5 points to 80.3 percent in 2015, the lowest percentage in four years.
- Ratings by U.S. East (88.3%), Canadian (88.4%), European (82.9%) and Japanese (75.5%) visitors were similar to 2014.

LIKELIHOOD TO REVISIT HAWAI‘I

Likelihood to revisit Hawai‘i is an indicator of future demand and changes in desires. Each visitor’s decision to return to Hawai‘i is influenced by a variety of factors. Among these factors are positive experiences during their most recent trips, a desire for new experiences, amount of time available, financial considerations, airline access and the distance from Hawai‘i.

Figure 4: Very Likely to Revisit Hawai‘i
(Percentage of visitors “Very Likely” to revisit in the next five years by MMA)

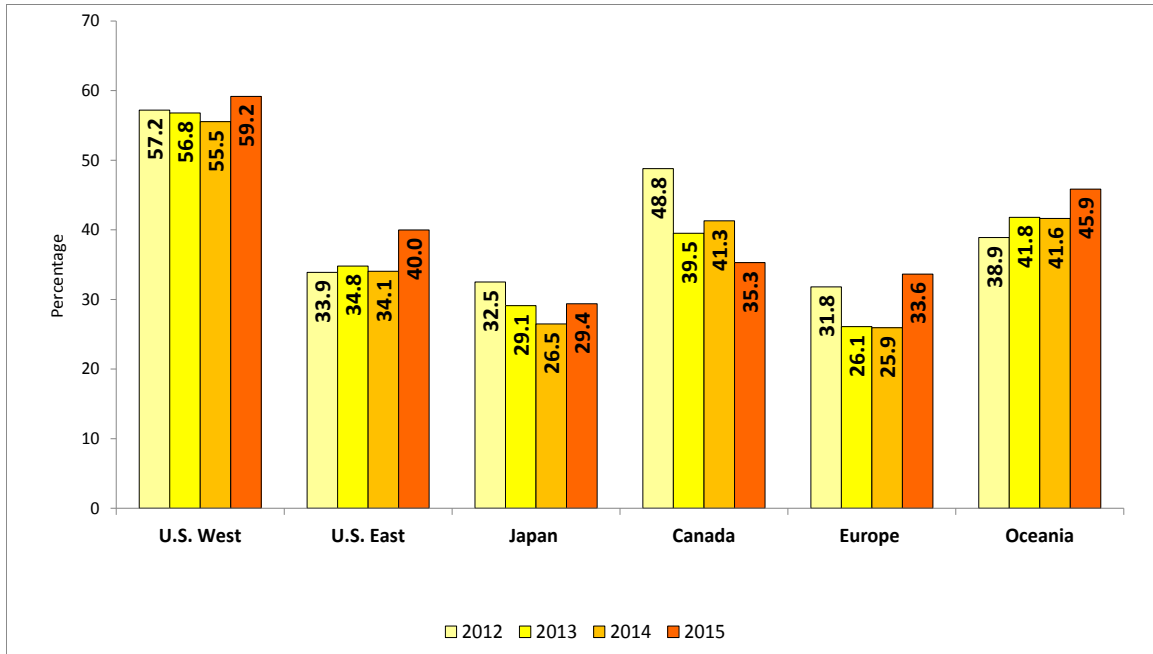


- Except for a slight decrease from Canada, a higher percentage of 2015 visitors from most markets said that they would “very likely” revisit Hawai‘i in the next five years.
- Eight out of ten U.S. West visitors said that they would “very likely” return, up 2.7 points from 2014.
- Over half of the Canadian (-1.3 points to 61.3%), U.S. East (+5.7 points to 57.7%), Oceania (+2.3 points to 52.8%) and Japanese (+1.5 points to 52.3%) visitors in 2015 would very likely come back.
- With the long distance and no direct flights to Hawai‘i, the percentage of European visitors who will likely return were around 35 percent in the last two years. In 2015, their rating rose 7 points to 43.4 percent.

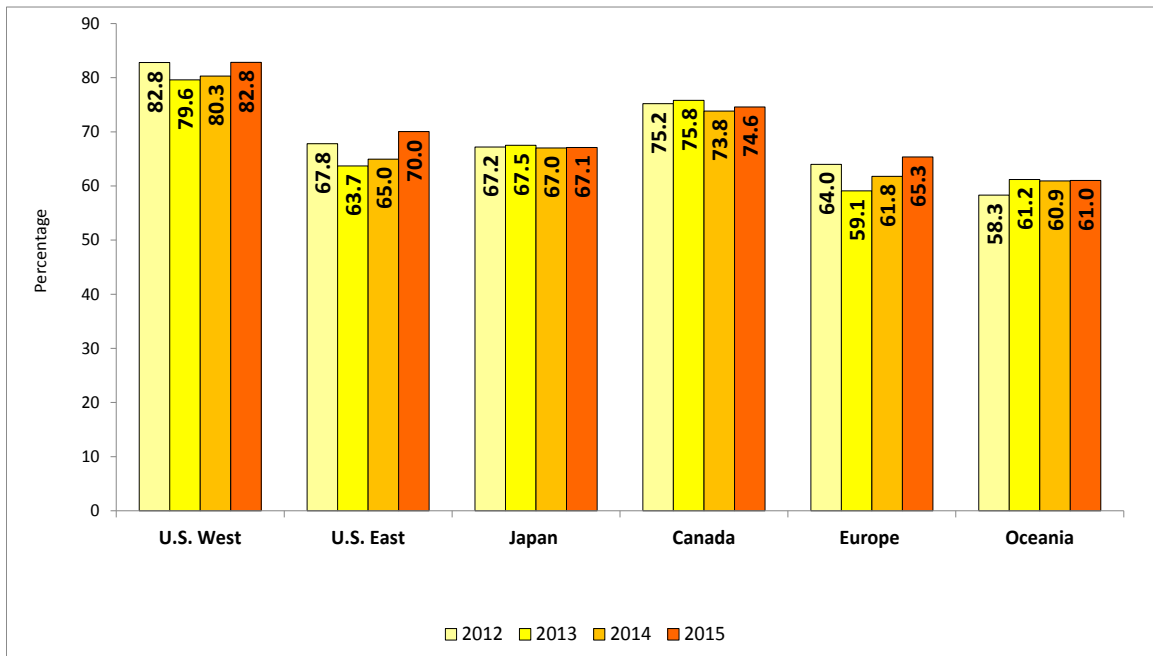
FIRST-TIME /REPEAT VISITORS

Likelihood to revisit is also highly correlated with visitor status (First-Time or Repeat). Percentages of First-Time and Repeat visitors varied across visitor markets. Figure 5 presents VSAT measures for likelihood of returning to Hawai‘i by First-Time visitors and Figure 6 presents the same measures by Repeat visitors.

**Figure 5: First-Time Very Likely to Revisit Hawai'i
(Percentage of First-Time visitors "Very Likely" to revisit in the next five years by MMA)**



**Figure 6: Repeat Visitors Very Likely to Revisit Hawai'i
(Percentage of Repeat visitors "Very Likely" to revisit in the next five years by MMA)**



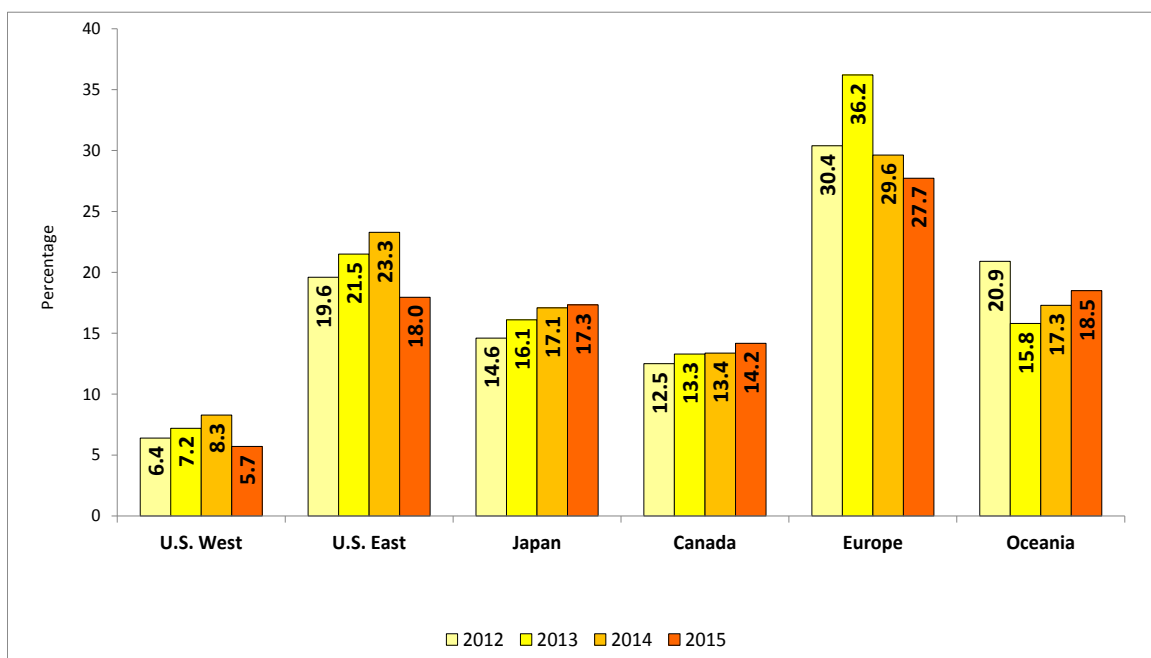
- Among U.S. West respondents, a higher percentage of First-Time visitors (+3.7 points to 59.2%) said that they would "very likely" return, while 82.8 percent (+2.5 points) of Repeat visitors said that they would come back.

- For U.S. East respondents, 40 percent of First-Time visitors said they would return, up from 34.1 percent in 2014. A greater percentage of Repeat Visitors (+5 points to 70%) said that they would very likely return compared to 2014.
- Among Japanese respondents, more First-Time visitors (+2.9 points to 29.4%) said that they would return, while ratings from Repeat visitors (67.1%) were similar to last year.
- For Canadian respondents, fewer First-Time visitors (-6 points to 35.3%) said that they will very likely revisit the islands. Ratings from Repeat visitors (+0.8% 74.6%) were comparable to 2014.
- Among European respondents, a higher of First-Time visitors (+7.7 points to 33.6%) and Repeat visitors (+3.5 points to 65.3%) said that they would likely return.
- For Respondents from Oceania, the likelihood of returning by First-Time visitors rose 4.3 points to 45.9 percent, while ratings by Repeat visitors (61%) were virtually unchanged from 2014.

Not Likely to Revisit Hawai‘i

In 2015, the percentage of U.S. West visitors who said that they would “not too likely” or “not at all likely” return to Hawai‘i continues to be fairly low. Percentages were higher for Canadian, Japanese, U.S. East and Oceania visitors and were the highest for European visitors (Figure 7).

Figure 7: 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)



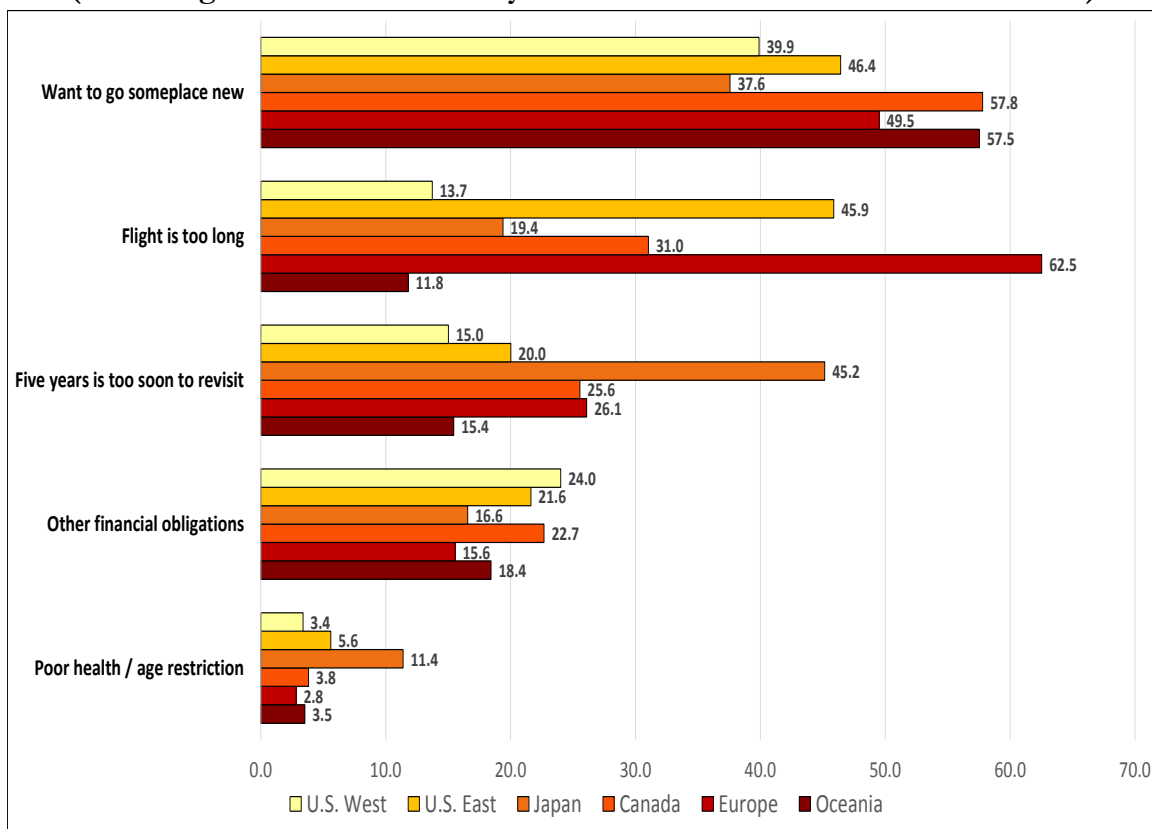
- Among European respondents, the percentage of not likely to return improved to 27.7 percent, the lowest in the last four years.
- Ratings by U.S. East (-5.3 points) and U.S. West (-2.6 points) respondents were also better compared to 2014.
- The percentage of Oceania visitors (+1.2 points to 18.5%) not likely to return were slightly higher than last year, while ratings for Japanese and Canadian visitors were relatively unchanged.

Reasons for Not Revisiting Hawai'i

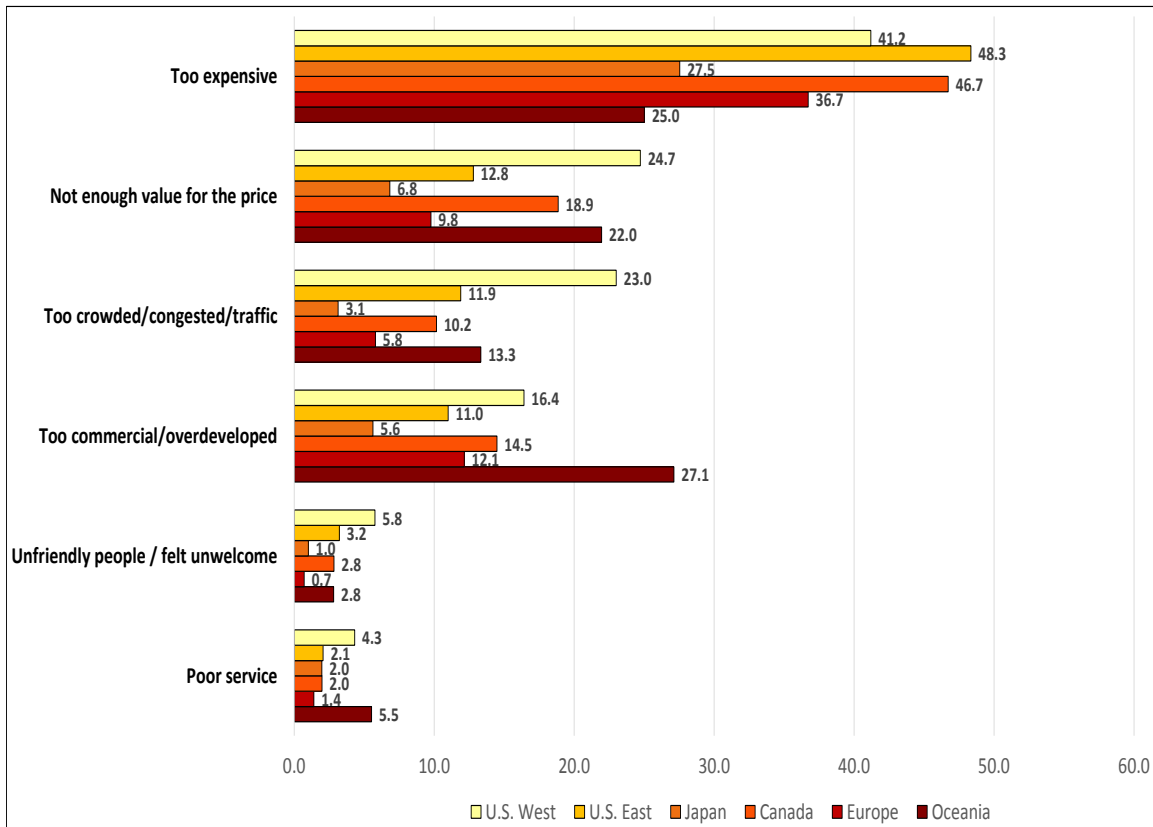
Respondents to the 2015 survey who said that they would “not too likely” or “not at all likely” return to the islands were asked to give the reason(s). A list of 11 reasons were offered in the survey and respondents could check all that applied.

The five items in Figure 8 are “barriers” to returning. They are conditions of the marketplace or characteristics of the traveler. The six items in Figure 9 are “performance” issues. They are comments that indicate dissatisfaction with Hawai'i’s visitor industry product. “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. For all visitor markets, very few respondents said they would not return because of unfriendly people or poor service.

Figure 8: Reasons for Not Returning by MMA – “Barriers”
(Percentage of Visitors not Likely to Revisit Hawai'i in the Next Five Years)



**Figure 9: Reasons for Not Returning by MMA – “Performance Issues”
(Percentage of Visitors not Likely to Revisit Hawai‘i in the Next Five Years)**



U.S. West: In 2015, 39.9 percent of U.S. West respondents said they will not return because they want to go someplace new, down from 51.6 percent last year. Fewer respondents said that five years is too soon to revisit (-4.1 points to 15%) but more respondents mentioned other financial obligations (+6.3 points to 24%) as barriers for not returning.

In terms of performance issues, fewer U.S. West respondents said that they will not be returning because Hawai‘i is too expensive (-9.7 points to 41.2%), there is not enough value for the price (-7.4 points to 24.7%) and Hawai‘i is too commercial/overdeveloped (-5.3 points to 16.4%) compared to a year ago.

U.S. East: Similar to 2014, the desire to go someplace new (46.4%) and the long flights (45.9%) were the top two barriers cited by U.S. East visitors. Some visitors also mentioned other financial obligations (21.6%) and five years is too soon to revisit (20%).

The high cost (+2.6 points 48.3%) continued to be the primary performance issue affecting U.S. East visitors’ likelihood to return. However, fewer respondents said there is not enough value for the price (-2.9 points to 12.8%) compared to last year.

Japan: Japanese respondents in 2015 continued to cite more barriers than performance-related issues as reasons for not returning. Similar to 2014, close to half of the visitors said that five years is too soon to revisit (-1.3 points 45.2%). Compared to a year ago, fewer visitors wanted to go someplace new (-3.1 points to 37.6%) but more said that the flight is too long (+6.2 points to 19.4%).

The high cost remains the primary performance issues for Japanese respondents. In 2015, 27.5 percent of the respondents said that Hawai'i is too expensive to revisit, up 9.7 points from last year. However, only 6.8 percent (+1.3 points) said there was not enough value for the price they paid.

Canada: The desire to visit someplace new (+3.8 points to 57.8%) continued to be the main barrier to revisiting Hawai'i among Canadian visitors. Other reasons provided were the long flight (31%) and five years is too soon to revisit (25.6%).

The primary performance-related issue was the high cost (46.7%) which rose 9.8 points compared to 2014. More respondents also felt that there is not enough value for the price (+6.2 points to 18.9%) compared to last year.

Europe: The long flight (+3.8 points to 62.5%) remains the primary barrier to European visitors' return to Hawai'i. Other reasons provided were the desire to go someplace new (-4.9 points to 49.5%) and five years is too soon to revisit (-7.1% to 26.1%), but these were down from the prior year.

The high cost (+8.3 points to 36.7%) was the most cited performance-related reason for not revisiting. Some felt that Hawai'i is too commercial/overdeveloped (-1.6 points to 12.1%) and there is not enough value for the price (+2.6 points to 9.8%).

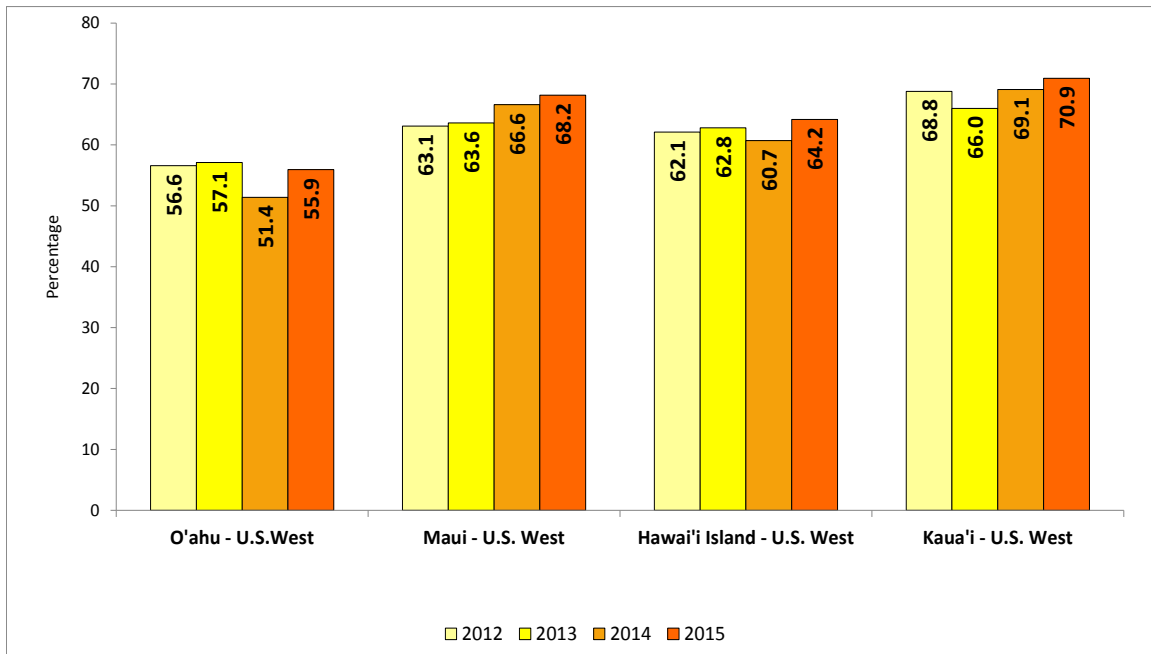
Oceania: Among this group of respondents, the most common barrier for revisiting remains the desire to go someplace new (-3.8 points to 57.5%). Fewer respondents also said five years is too soon to revisit (-4.2 points to 15.4%).

In terms of performance issues, more Oceania respondents said that they will not be returning because Hawai'i is too commercial/overdeveloped (+6.1% to 27.1%), Hawai'i is too expensive (+11.6 points to 25%) and there is not enough value for the price (+8.4 points to 22%) compared to 2014.

INDIVIDUAL ISLAND EXPERIENCE

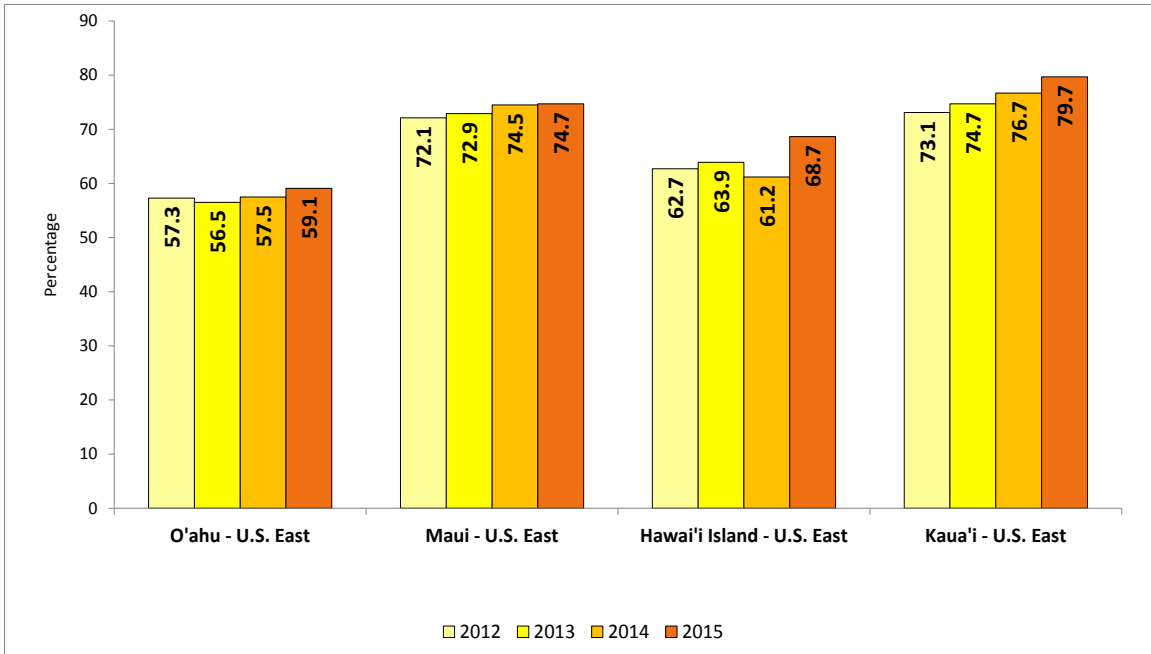
Each island has unique characteristics, activities, and products that provide different visitor experiences. Overall, the majority of visitors reported that their individual island experiences were “excellent.” Figure 10 shows island-by-island satisfaction rating among U.S. West visitors.

**Figure 10: Island Experience Rated as “Excellent” – U.S. West Visitors
(Percentage of visitors by island)**



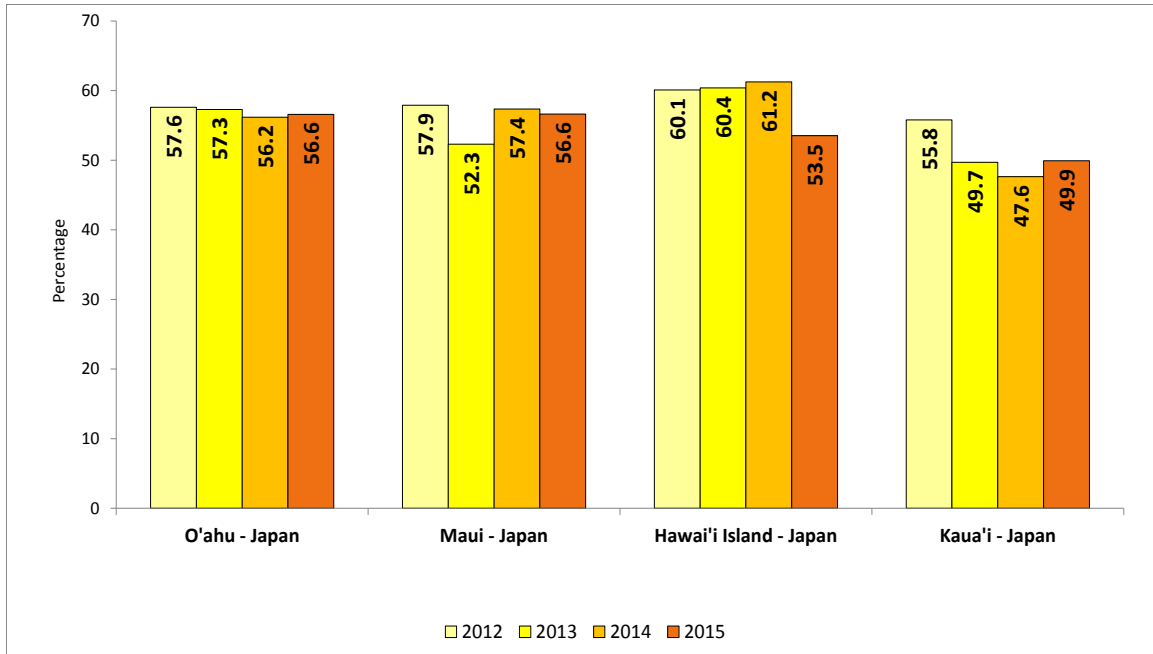
- In 2015, 55.9 percent of U.S. West visitors gave excellent ratings to O'ahu, up 4.5 points from last year.
- Ratings for Hawai'i Island (+3.5 points), Kaua'i (+1.8 points) and Maui (+1.6 points) also improved compared to 2014.

**Figure 11: Island Experience Rated as “Excellent” – U.S. East Visitors
(Percentage of visitors by island)**



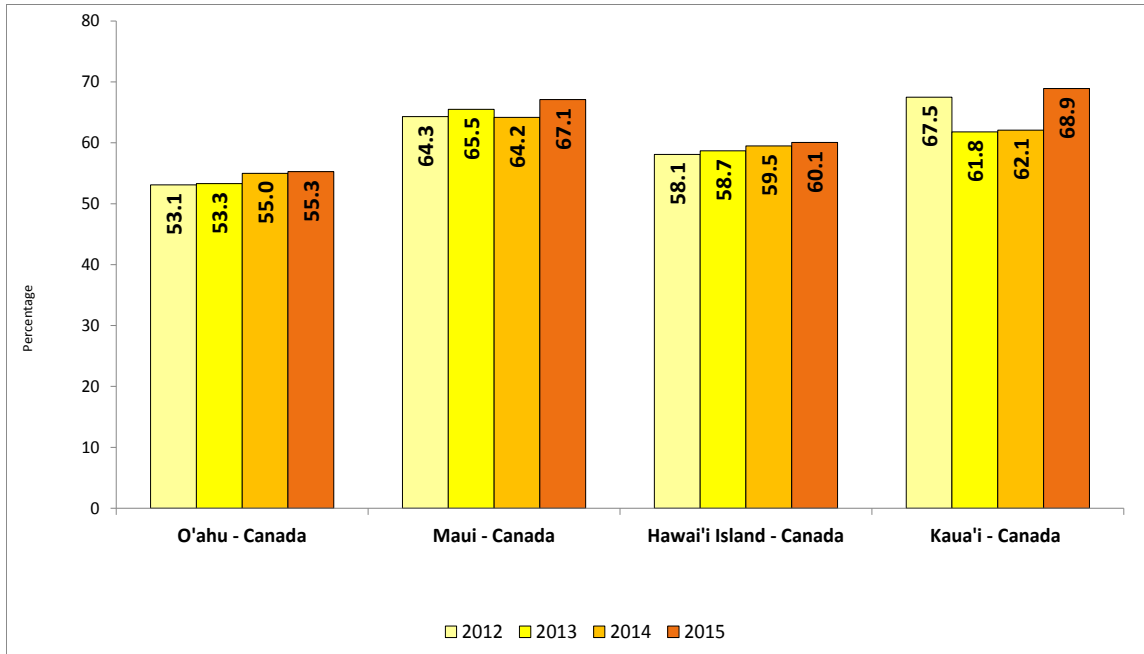
- In 2015, excellent ratings for Hawai'i Island by U.S. East visitors rose 7.5 points to 68.7 percent
- Ratings for Kaua'i (+3 points) and O'ahu (+1.6 points) were also higher than 2014.
- Maui's percentage of excellent ratings (74.7%) was virtually unchanged from last year.

**Figure 12: Island Experience Rated as “Excellent” – Japanese Visitors
(Percentage of visitors by island)**



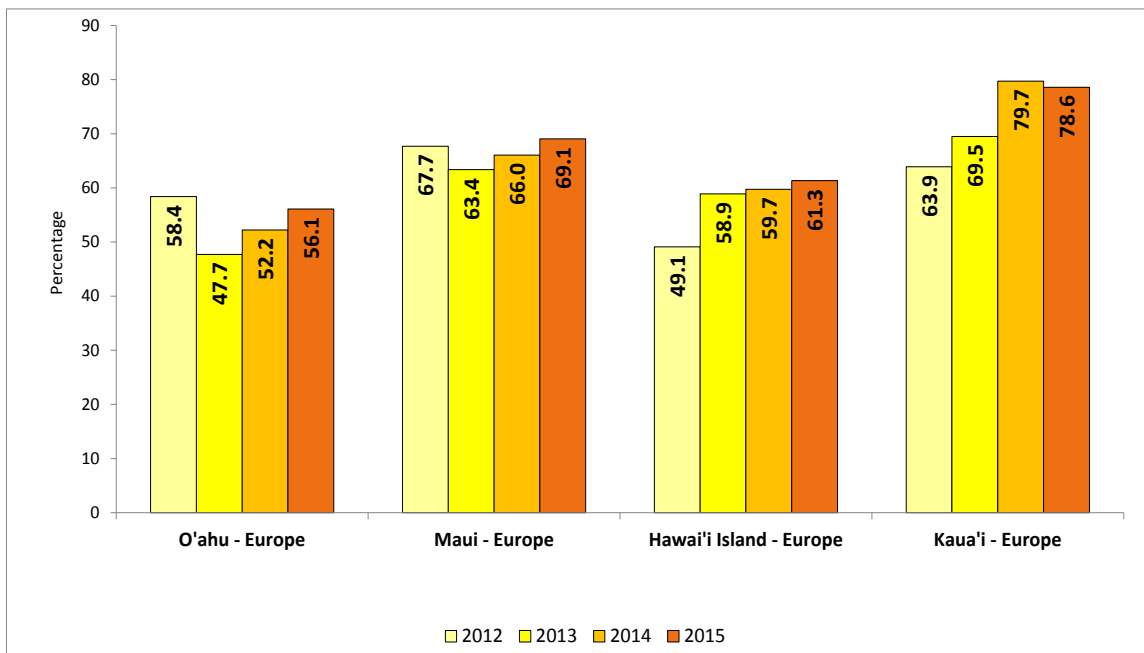
- Over half of Japanese respondents gave excellent ratings to O’ahu (+0.4 points) and Maui (-0.8 points) similar to 2014.
- Excellent ratings for Hawai’i Island declined (-7.7 points to 53.5%) compared to last year. However, 42.5 percent of the respondents still rated Hawai’i Island “above average” and only 4 percent gave ratings of below average or poor.
- Ratings for Kaua’i improved 2.3 points to 49.9 percent.

**Figure 13: Island Experience Rated as “Excellent” – Canadian Visitors
(Percentage of visitors by island)**



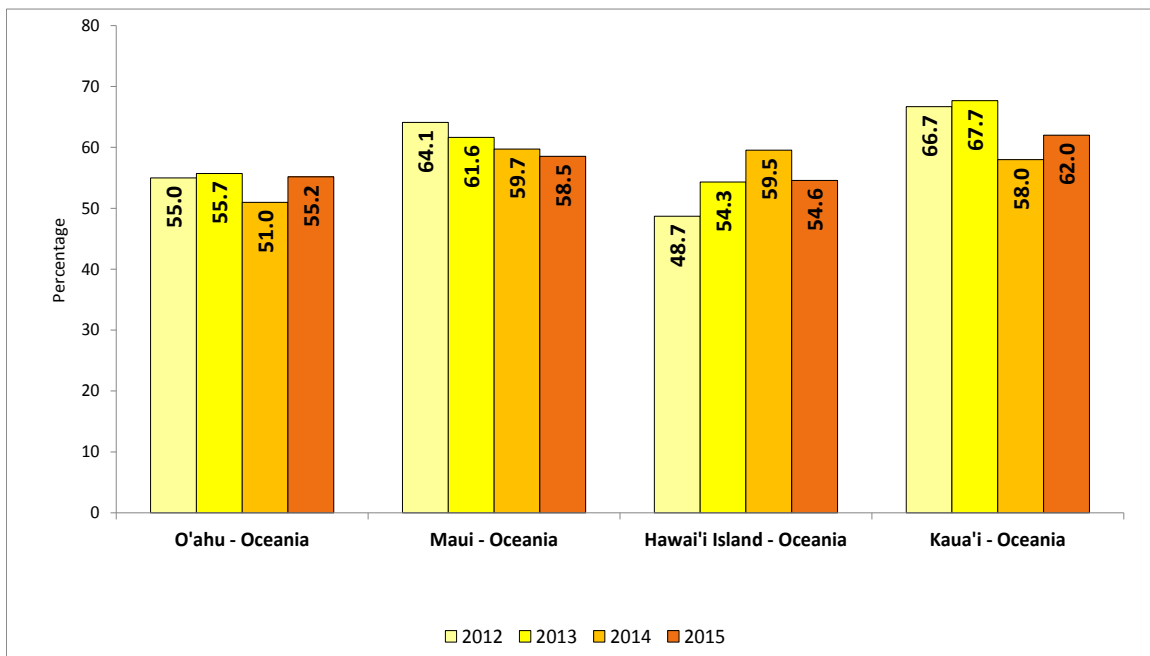
- In 2015, Kaua'i's excellent ratings by Canadian visitors improved 6.8 points to 68.9 percent.
- Maui's 67.1 percent was an increase of 2.9 points compared to 2014.
- Ratings for Hawai'i Island (60.1%) and O'ahu's (55.3%) changed very little from last year.

**Figure 14: Island Experience Rated as “Excellent” – European Visitors
(Percentage of visitors by island)**



- Rating by European visitors for O‘ahu’s (+3.9 points), Maui (+3.1 points) and Hawai‘i Island (+1.6 points) increased compared to 2014.
- Kaua‘i’s rating was down slightly (-1.1 points) from the prior year.

**Figure 15: Island Experience Rated as “Excellent” – Oceania Visitors
(Percentage of visitors by island)**



- Excellent ratings by Oceania visitors for O‘ahu (+4.2 points) and Kaua‘i (+4 points) improved from 2014.
- Hawai‘i Island’s rating fell 4.9 points to 54.6 percent.
- Maui ratings was slightly lower (-1.2 points) than the year before.