



2015

Visitor Satisfaction  
Monitoring Report

First Quarter  
(January – March)

**HAWAII** TOURISM  
AUTHORITY

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## INTRODUCTION

This quarterly monitoring report presents selected preliminary statistics from the first 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 2,085,006 visitors who came by air to the Hawaiian Islands in the first quarter (January – March) of 2015. This represented a growth of 2.9 percent compared to the first quarter of 2014. Arrivals from U.S. West increased 8.5 percent to 787,333 visitors. However, the number of U.S. East visitors declined 2.5 percent to 467,964 visitors. There was also a decrease in Japanese arrivals (-4.7%) to 358,880 visitors. Canadian arrivals of 214,835 (+0.8%) were up slightly compared to a year ago. Arrivals from Oceania climbed 21.5 percent to 111,857 visitors in the first quarter of 2015. There were 26,554 visitors from Europe, which was a 4.9 percent drop from the first quarter of 2014. The average length of stay for all visitors to the state was 9.63 days, similar to the same quarter last year.

Arrivals increased on O'ahu (+0.9% to 1,255,318 visitors), Maui (+4.8% to 636,965 visitors), Hawai'i Island (+2.5% to 389,044 visitors) and Kaua'i (+6% to 284,367) compared to the first 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
U.S. West	75	82	82	80	82	82	82	81	83
U.S. East	80	86	89	85	82	85	84	84	88
Japan	69	69	74	69	63	69	74	69	69
Canada	81	86	88	83	80	84	86	86	83
Europe	87	88	83	81	77	82	91	85	86
Oceania	85	79	76	74	77	79	79	73	81

P = Preliminary

- In the first quarter of 2015, over 80 percent of U.S. West, U.S. East, Canadian, European and Oceania respondents, and nearly 70 percent of Japanese respondents, rated their most recent trip to Hawai‘i as excellent. Ratings increased from European (+9 points), Japanese (+6 points) and U.S. East (+6 points) respondents when compared to a year ago.

**Figure 2: Overall Rating of Trip**

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

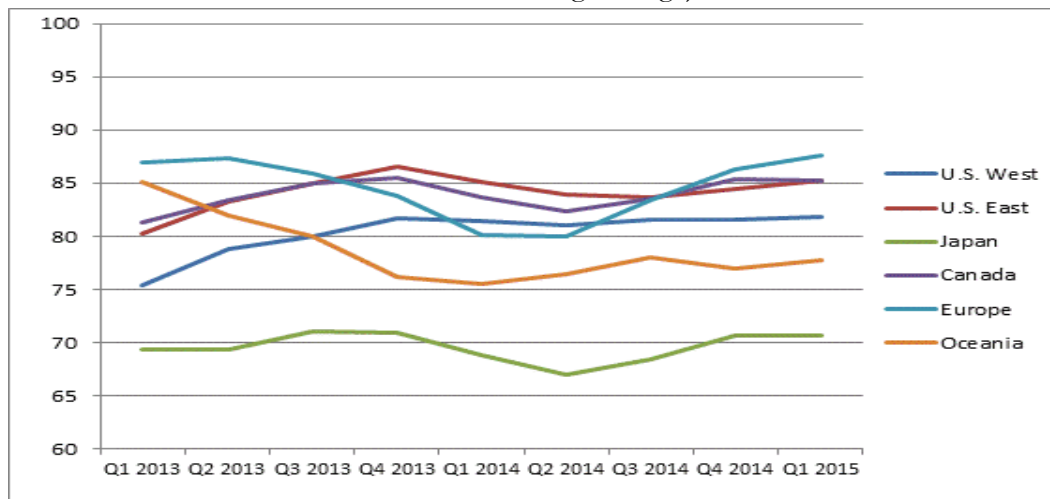


Figure 2 shows the trend lines for overall satisfaction of respondents in each MMA. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which is represents the calculated average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

For U.S. East, Japanese, Canadian and Oceania respondents, after small declines in the first and second quarters of 2014, overall satisfaction ratings have stabilized in recent quarters. Ratings by European respondents have been trending upward since the third quarter of 2014. Ratings from U.S. West respondents have been fairly consistent, resulting in a flat trend line.

### 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 (5% 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
U.S. West	37	39	41	36	33	34	38	34	36
U.S. East	44	51	53	47	45	53	51	46	43
Japan	31	29	35	33	29	31	35	36	34
Canada	36	43	51	41	35	46	54	39	37
Europe	48	51	53	46	48	40	55	52	56
Oceania	44	40	38	38	38	33	37	40	43

P = Preliminary

- In the first quarter of 2015, 56 percent of European respondents said their recent trip to Hawai‘i exceeded expectations. This was an 8 point increase compared to the first quarter of 2014. Japanese visitors’ rating improved 5 points to 34 percent.

### Figure 4: Trip Exceeds Expectations

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

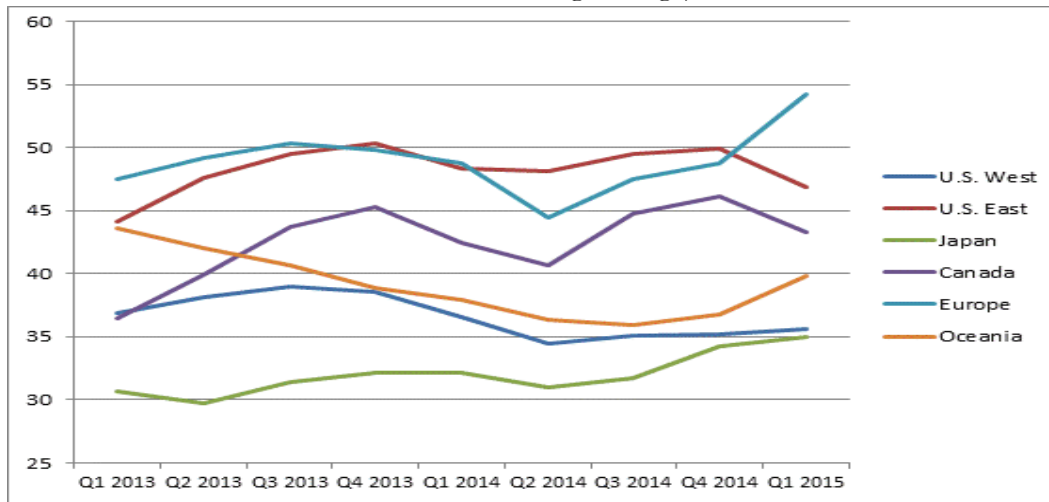


Figure 4 shows the longer-range pattern of change for this measure of satisfaction. Overall, scores on the “exceeding expectations” satisfaction indicator tend to be lower than typical scores on the other satisfaction indicators. “Exceeding expectations” is a higher standard for satisfaction, and, over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

Ratings by U.S. West respondents have been trending upward since the second quarter of 2014. After declining through the third quarter of 2014, the trend line for Oceania respondents showed slight improvements in recent quarters. Trend lines for U.S. East and Canadian respondents displayed similar patterns of fluctuation over the last nine quarters and were down in the first quarter 2015. The trend line for Japanese respondents showed a steady increase since 2013.

## 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 3 percent of visitors from each market were “not too likely” or “not at all likely” to recommend Hawai'i.

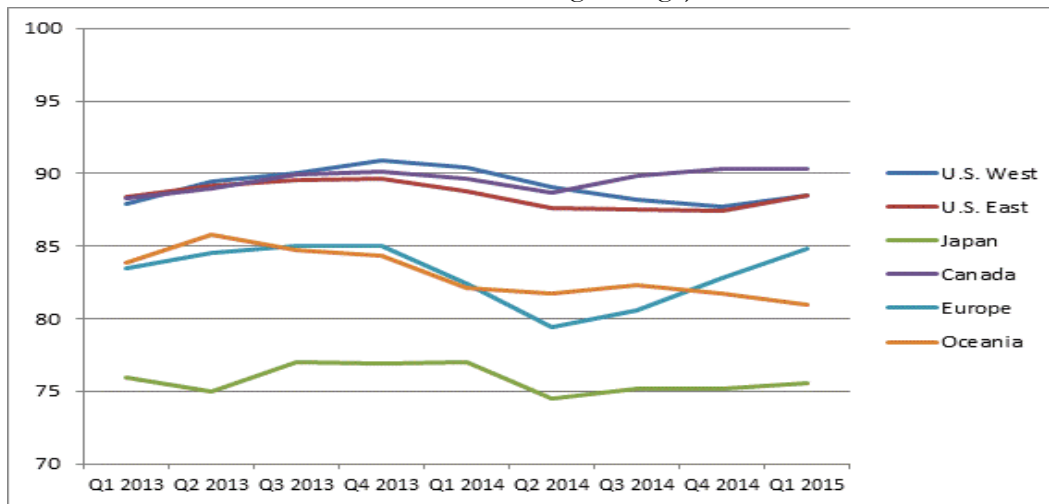
**Figure 5: Very Likely to Recommend Hawai'i to Friends and Relatives**  
(Percentage of visitors who are “Very Likely” to recommend Hawai'i by MMA)

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

P = Preliminary

Figure 5 shows a stable pattern of willingness to recommend Hawai'i by respondents from most visitor markets, and their ratings were similar between the first quarters of 2014 and 2015.

**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 showed the highest overall willingness to recommend Hawai'i. These consistent ratings resulted in relatively flat trend lines. Respondents from Oceania and Europe provided mid-range ratings of willingness to recommend, but Europe was trending upward while Oceania was trending down. Japan continued to report the lowest willingness to recommend Hawai'i to friends and family, and the trend line has been flat.

## Likely to Revisit Hawai'i

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**

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

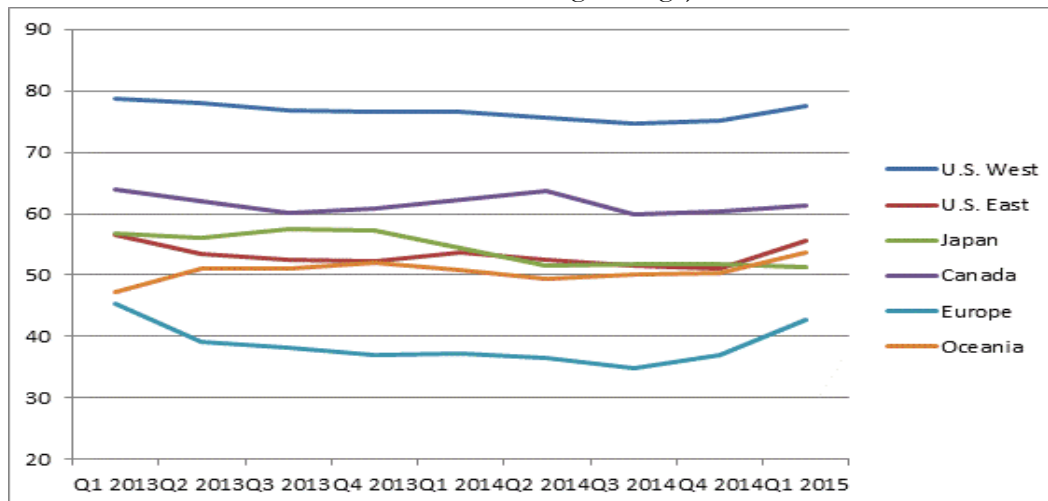
MMA	2013				2014				2015P
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015
U.S. West	79	77	74	78	78	72	74	79	79
U.S. East	56	50	51	55	55	48	52	54	61
Japan	57	55	60	56	47	52	57	47	50
Canada	64	60	56	66	64	61	55	66	63
Europe	45	33	36	42	34	34	37	40	52
Oceania	47	55	51	50	51	47	53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

P = Preliminary

- Nearly 80 percent of U.S. West respondents and 50 percent or more U.S. East, Japanese, Canadian, European and Oceania respondents would very likely revisit Hawai'i in the next five years.
- Ratings by European respondents rose significantly (+18 points). Ratings from Oceania (+6%) and U.S. East (+6 points) respondents also increased from the first quarter of 2014.
- In the first quarter of 2015, similar percentages of U.S. West, Japanese and Canadian visitors said that they would very likely revisit Hawai'i compared to a year ago.

**Figure 8: Very Likely to Revisit Hawai'i**

(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, U.S. East, Canada, Europe and Oceania, trend lines have been relatively flat through 2014 and increased slightly in the first quarter of 2015. The trend line for Japan has been fairly stable since the first quarter of 2014.

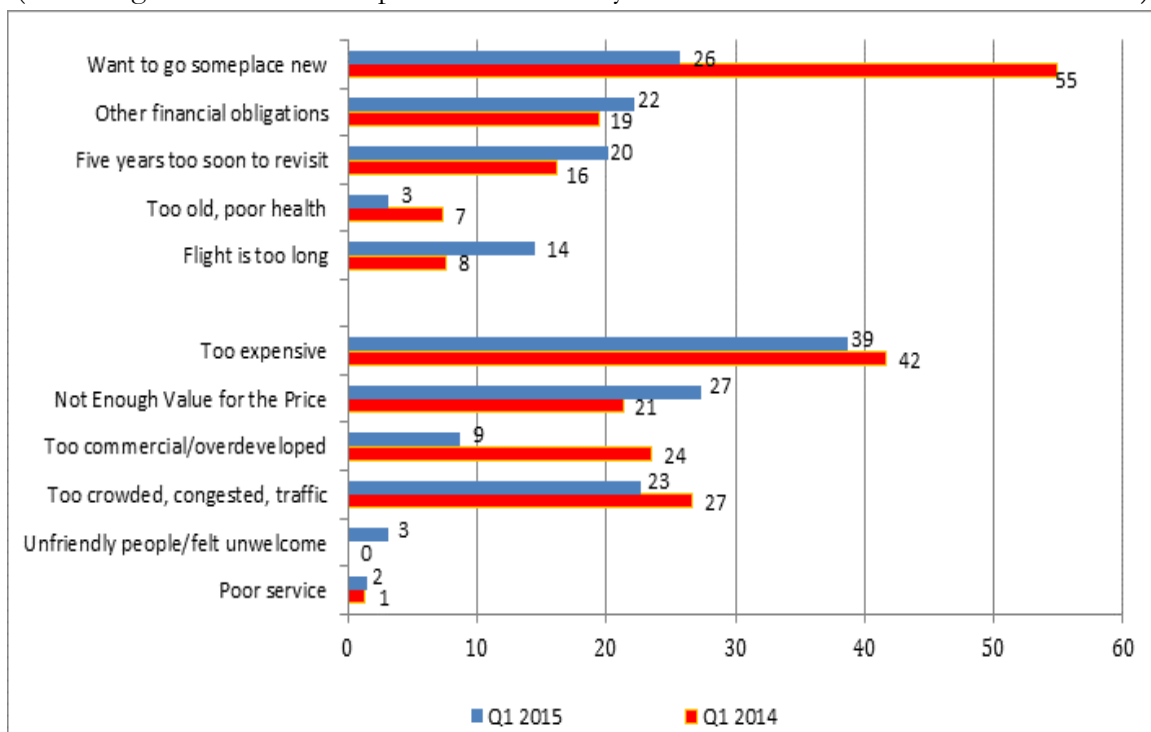
## Reasons for Not Revisiting Hawai‘i

Visitors who said that they would *not likely revisit Hawai‘i* 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.”

Across all visitor markets in the first quarter of 2015, very few (less than 5%) said that they will not be returning due to poor service or unfriendly people.

**Figure 9 Reasons for Not Revisiting Hawai‘i in Next 5 Years – U.S. West**  
(Percentage of U.S. West Respondents not Likely to Revisit Hawai‘i in the Next Five Years)

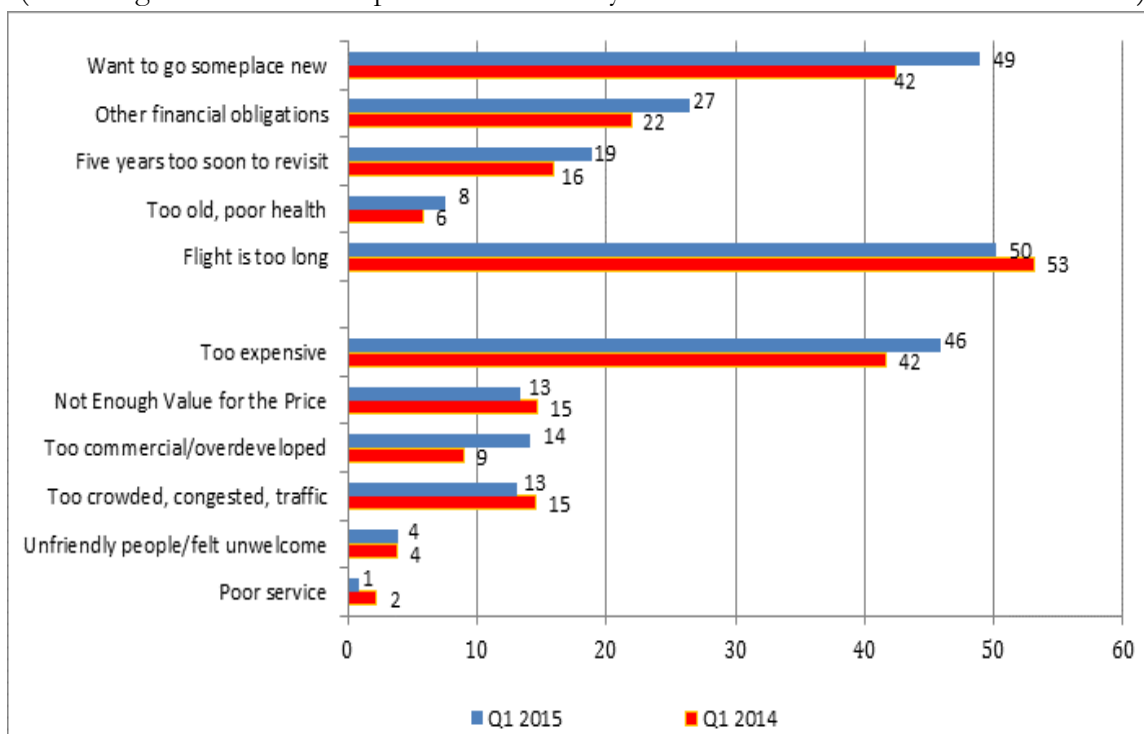




- A much lower percentage of U.S. West respondents cited the desire to go someplace new (26%) as a barrier for returning to Hawai'i compared to the first quarter of 2014 (55%). More visitors said that five years is too soon to revisit (+4 points to 20%) and the flight is too long (+6 points to 14%).
- In terms of performance issues, 39 percent of U.S. West respondents said that they will not be returning because Hawai'i is too expensive. More U.S. West respondents said that there is not enough value for the price (+6 points to 27%), but fewer said that Hawai'i is too commercial/overdeveloped (-15 points to 9%), or too crowded/congested (-4 points to 23%) compared to the first quarter of 2014.

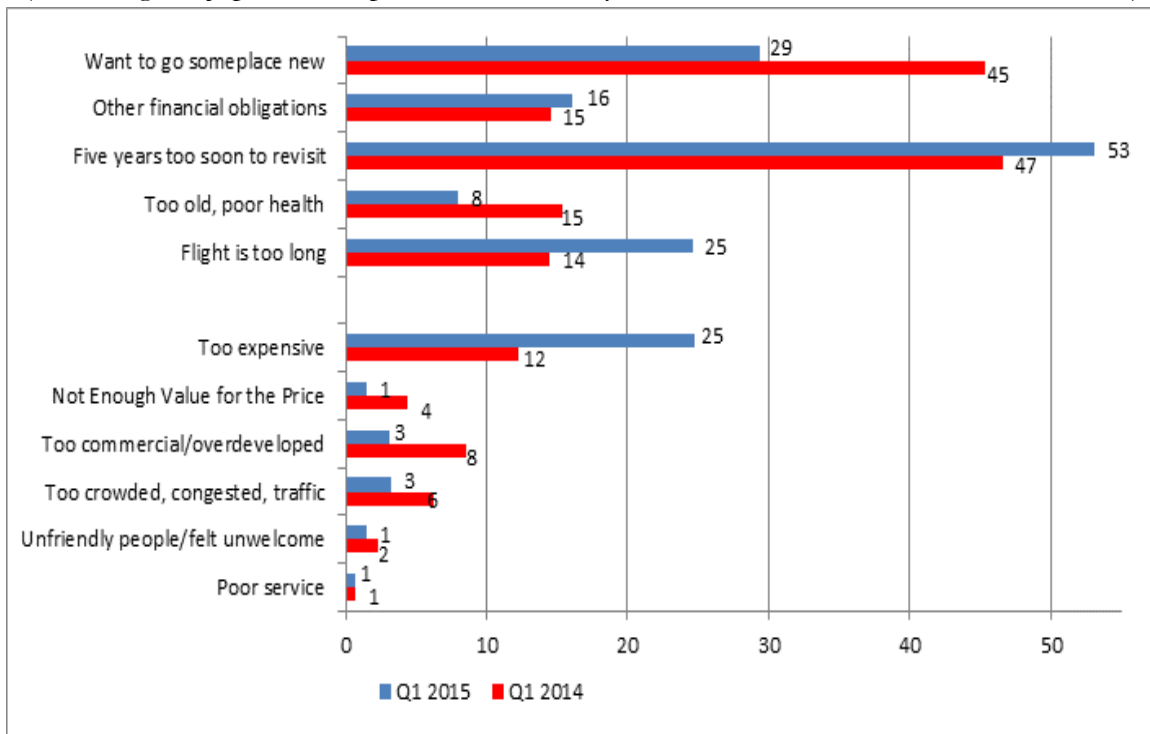
**Figure 10: Reasons for Not Revisiting Hawai'i in Next 5 Years – U.S. East**

(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)



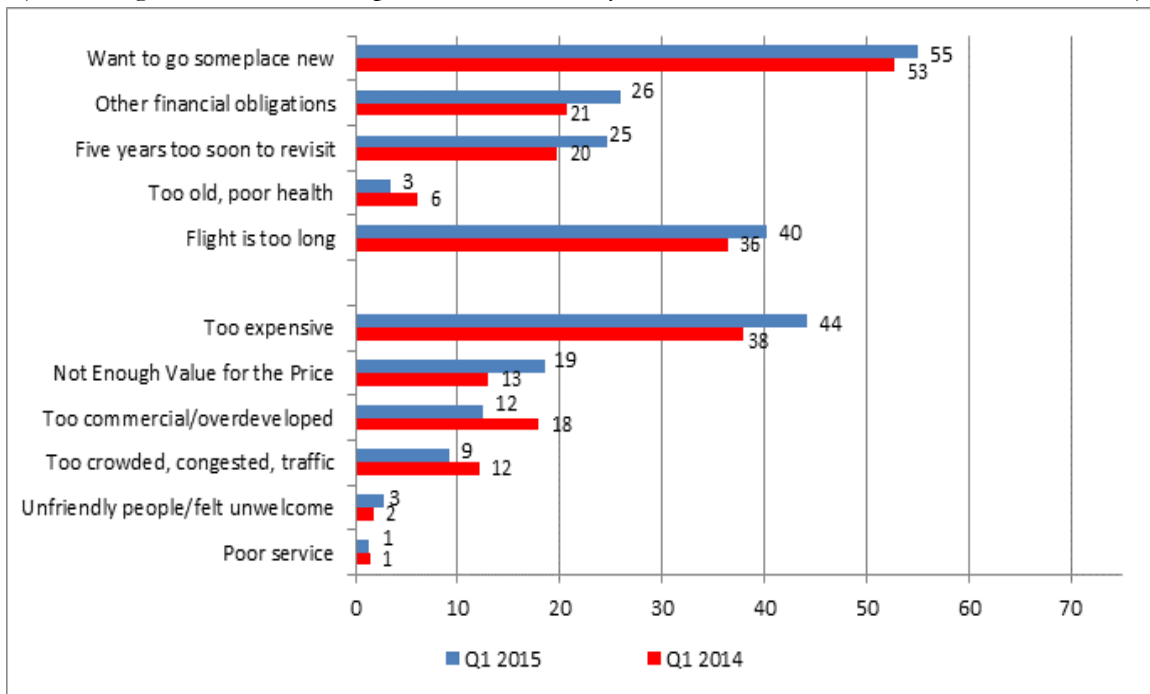
- For U.S. East visitors, the most cited barrier for returning is the long flight (50%). A larger percentage of visitors said that they want go someplace new (+7 points 49%) compared to the first quarter of 2014.
- Nearly half of U.S. East respondents who will not revisit said that Hawai'i is too expensive (46%), up 4 points from the first quarter of 2014. Though only 13 percent cited that there is not enough value for the price. Compared to last year, a higher percentage of respondents said that Hawai'i is too commercial/overdeveloped (+5 points to 14%).

**Figure 11: Reasons for Not Revisiting Hawai'i in Next 5 Years – Japan**  
 (Percentage of Japanese Respondents not Likely to Revisit Hawai'i in the Next Five Years)



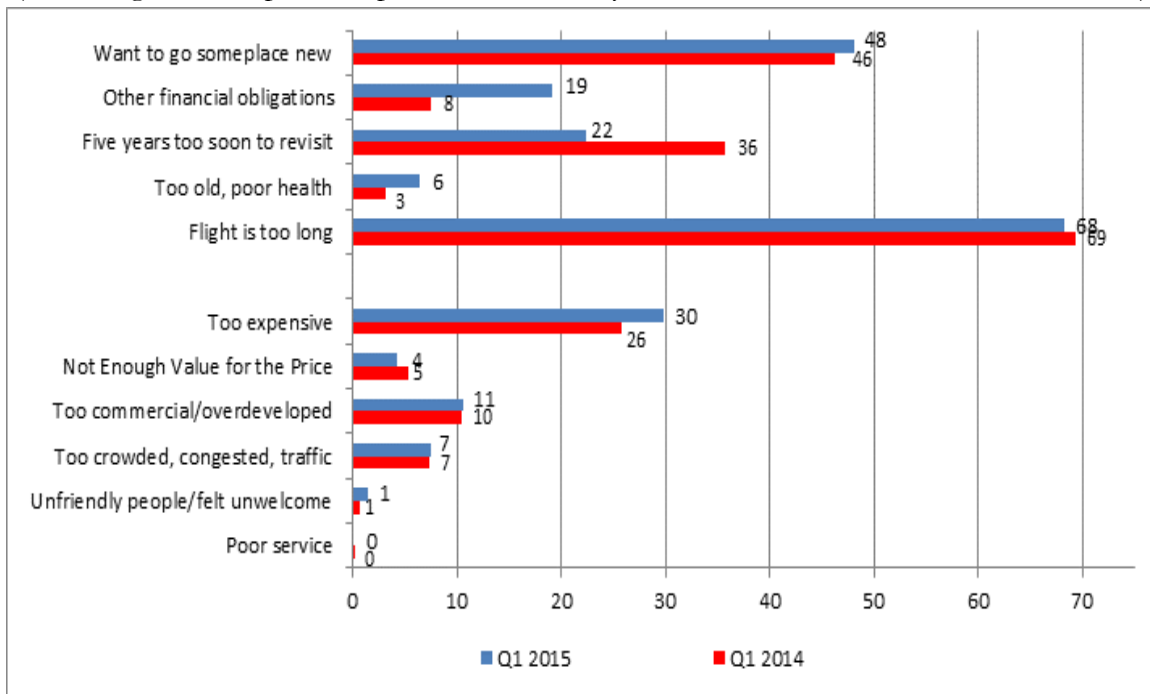
- Japanese respondents continued to cite more barriers than performance-related issues as reasons for not returning. Over half of respondents in first quarter 2015 said that five years is too soon to revisit (53%), which was a 6 point increase from the same quarter last year.
- Fewer Japanese respondents said that they would rather visit some place new (-16 points to 29%), but more mentioned that the flight is too long (+11 points to 25%).
- A higher percentage of Japanese respondents cited that Hawai'i is too expensive to revisit (+13 points), though almost everyone felt there was value for the price they paid.

**Figure 12: Reasons for Not Revisiting Hawai'i in Next 5 Years – Canada**  
 (Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)



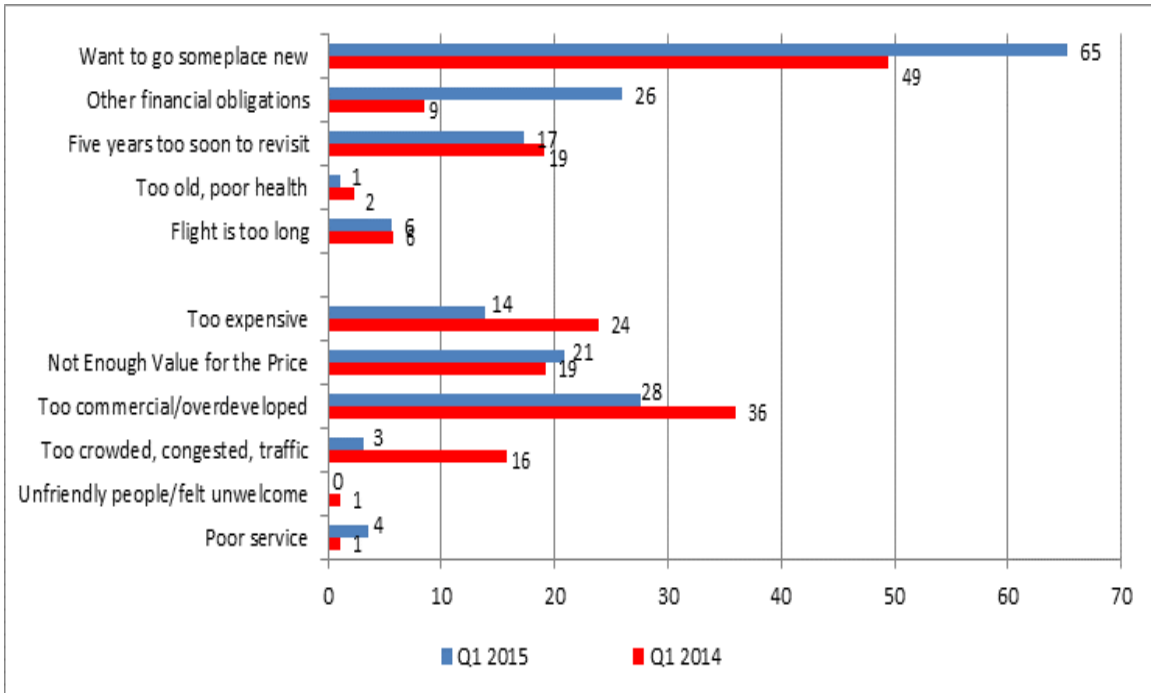
- Among Canadian respondents, the desire to visit some place new (55%) was their main barrier to revisiting Hawai'i, followed by the flight being too long (40%). More respondents cited other financial obligations (+5 points to 26%) and five years being too soon to revisit (+5% to 25%) compared to the first quarter of 2014.
- The primary performance-related issue was the high cost (+6 points to 44%). An increase in the number of respondents also said that there is not enough value for the price (+6 points to 19%).

**Figure 13: Reasons for Not Revisiting Hawai'i in Next 5 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 (68%). Nearly half of the respondents cited the desire to go someplace new (48%). More European respondents mentioned other financial obligations (+11 points), but fewer said five years is too soon to revisit (-14 points) compared to the first quarter of 2014.
- The high cost of coming to Hawai'i (+4 points to 30%) was the most common performance-related reason for not returning. However, very few complained that there was not enough value for the price they paid.

**Figure 14: Reasons for Not Revisiting Hawai'i in Next 5 Years – Oceania**  
 (Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)



- Significantly more Oceania respondents cited the desire to go someplace new (+16 points to 65%) as a reason for not returning compared to the first quarter of 2014. A larger percentage of visitors also indicated other financial obligations (+17 points) as a barrier to revisiting Hawai'i.
- One fifth of the respondents felt that there was not enough value for the price they paid (21%). Fewer respondents said Hawai'i is too expensive (-10 points), too commercial/overdeveloped (-8 points), and too crowded or congested (-13 points) compared to a year ago.

## 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 9 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
O'ahu	56	57	60	57	50	55	58	52	57
Maui	62	73	70	67	67	71	71	69	69
Hawai'i Island	55	56	58	51	58	61	67	60	57
Kaua'i	65	72	74	63	62	75	78	72	73

P = Preliminary

Among U.S. respondents, first quarter 2015 ratings improved 11 points for Kauai and 7 points for O'ahu compared to a year ago. Ratings for Hawai'i Island and Maui changed very little from the first quarter of 2014.

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

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

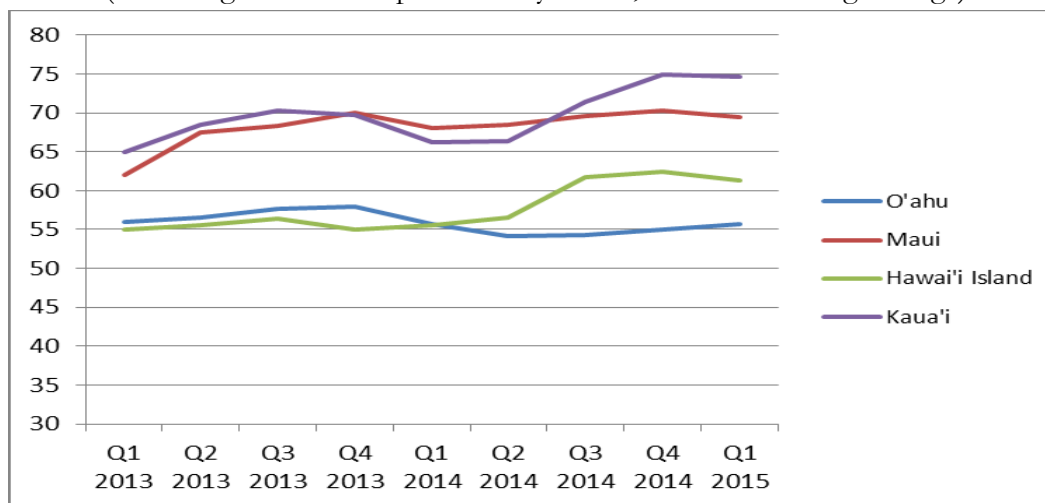


Figure 16 shows trend lines for the data in Figure 15. The trend lines represent three-quarter moving averages except for the data points for first quarter 2013 which includes only first quarter 2013 data, and second quarter 2013 which is represents the calculated average of first and second quarter 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 been relatively flat over the last two years. In contrast, ratings for Kaua'i and Hawai'i Island increased in 2014. Kaua'i's ratings have surpassed Maui's ratings since the second quarter of 2014. Hawai'i Island's ratings have been higher than Oahu's ratings since the beginning of 2014.

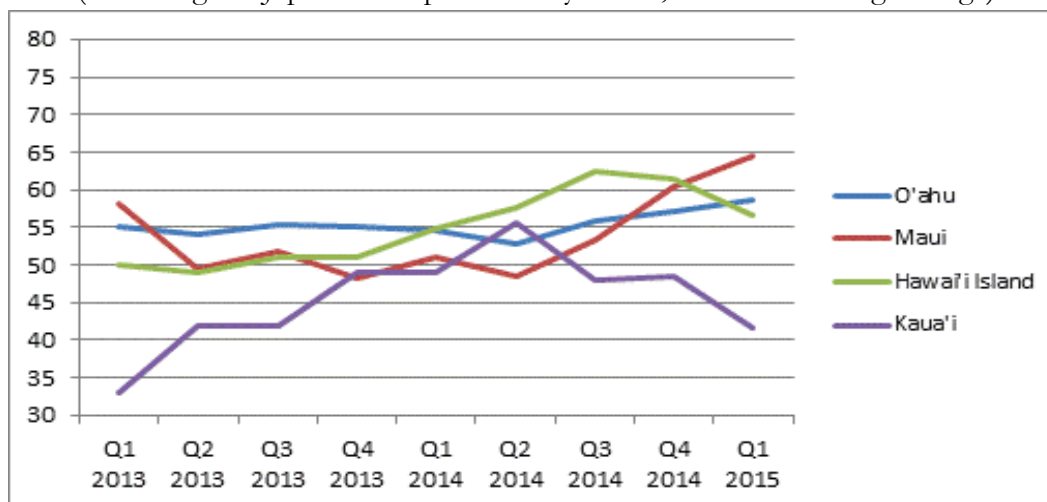
**Figure 17: Island Experience Rated as Excellent – Japan**  
(Percentage of Japanese Respondents by Island)

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

P = Preliminary

A higher percentage of Japanese respondents gave excellent ratings to Maui (+11 points) and O'ahu (+5 points) compared to the first quarter of 2014. Ratings for Hawai'i Island and Kaua'i each fell by 10 points versus the same time last year.

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



The trend line for Kaua'i has shown fluctuations over the last 9 quarters. Kaua'i's ratings have been trending downward after peaking in the second quarter of 2014. The trend line for Hawai'i Island has also declined in recent quarters. O'ahu's ratings have been slowly trending upward since the second quarter of 2014. Maui had the top rating for the fourth quarter of 2014 and the first quarter of 2015.

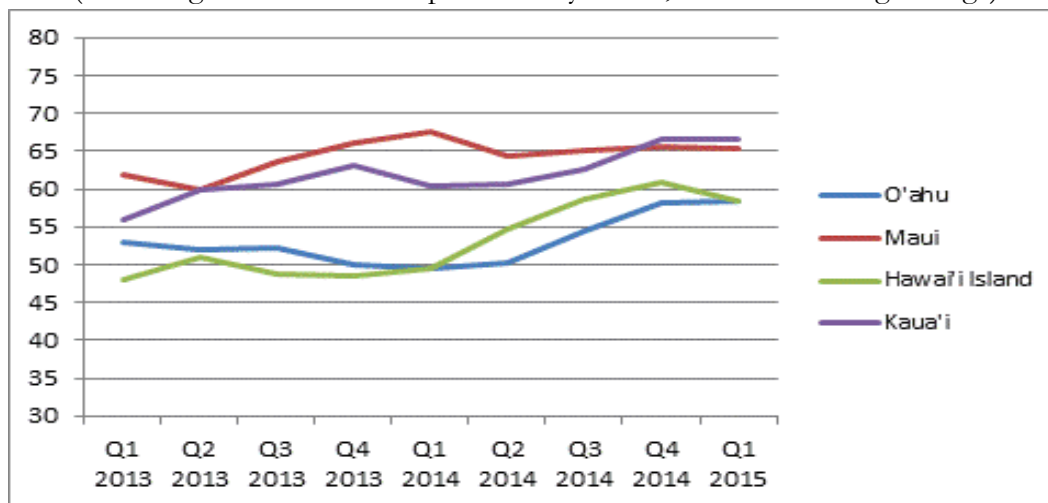
**Figure 19: Island Experience Rated as Excellent – Canada**  
(Percentage of Canadian Respondents by Island)

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

P = Preliminary

Canadian respondents showed a higher percentage of excellent ratings for Kaua'i (+7 points) and O'ahu (+7 points) compared to the first quarter of 2014. Ratings for Hawai'i Island declined 4.2 points. Maui's rating declined 2.3 percent.

**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, but the gap between island ratings has decreased. Trend lines for Maui and Kaua'i have been fairly flat in recent quarters. Trend lines for Hawai'i Island and O'ahu, which increased through 2014, showed a slight decline in the first quarter of 2015.



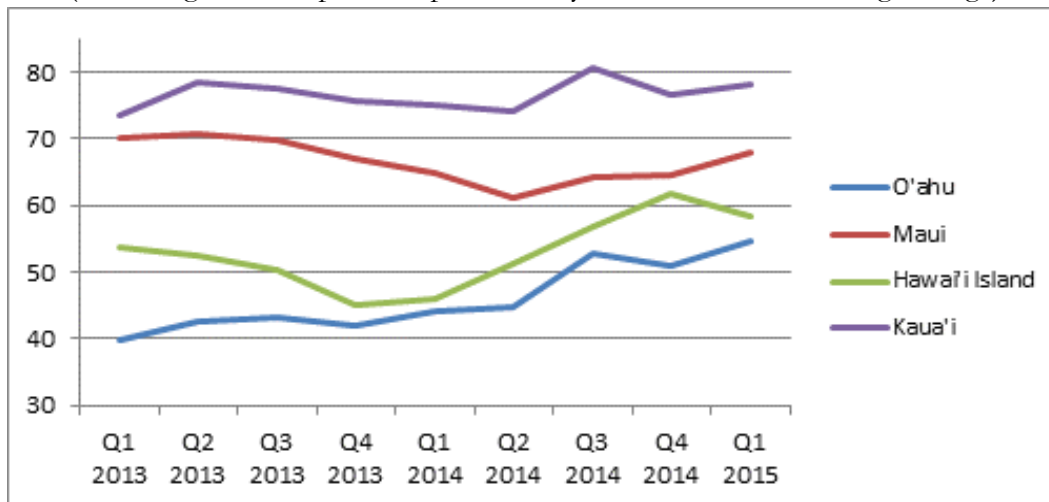
**Figure 21: Island Experience Rated as Excellent – Europe**  
(Percentage of European Respondents by Island)

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

P = Preliminary

Among European respondents, the percentage of visitors who rated O'ahu excellent improved 6 points compared to the fourth quarter of 2014.

**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. Kaua'i's ratings peaked in the third quarter of 2014, dropped in the next quarter then increased again in the first quarter of 2015. After declining in the second quarter of 2014, trend lines for Maui and O'ahu have shown improvements in recent quarters. Ratings for Hawai'i Island, which increased over the course of 2014 was down in the first quarter of 2015.

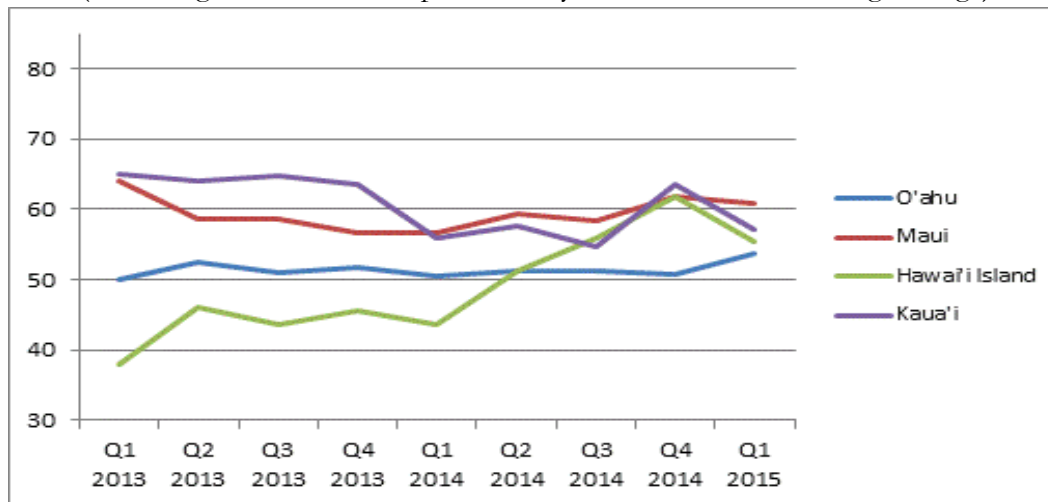
**Figure 23: Island Experience Rated as Excellent – Oceania**  
(Percentage of Oceania Respondents by Island)

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

P = Preliminary

The percentage of excellent ratings from Oceania respondents were higher for K aua'i (+12 points), Maui (+11 points) and O'ahu (+8 points) compared to the first quarter of 2014, but ratings for Hawai'i Island declined 6 points.

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

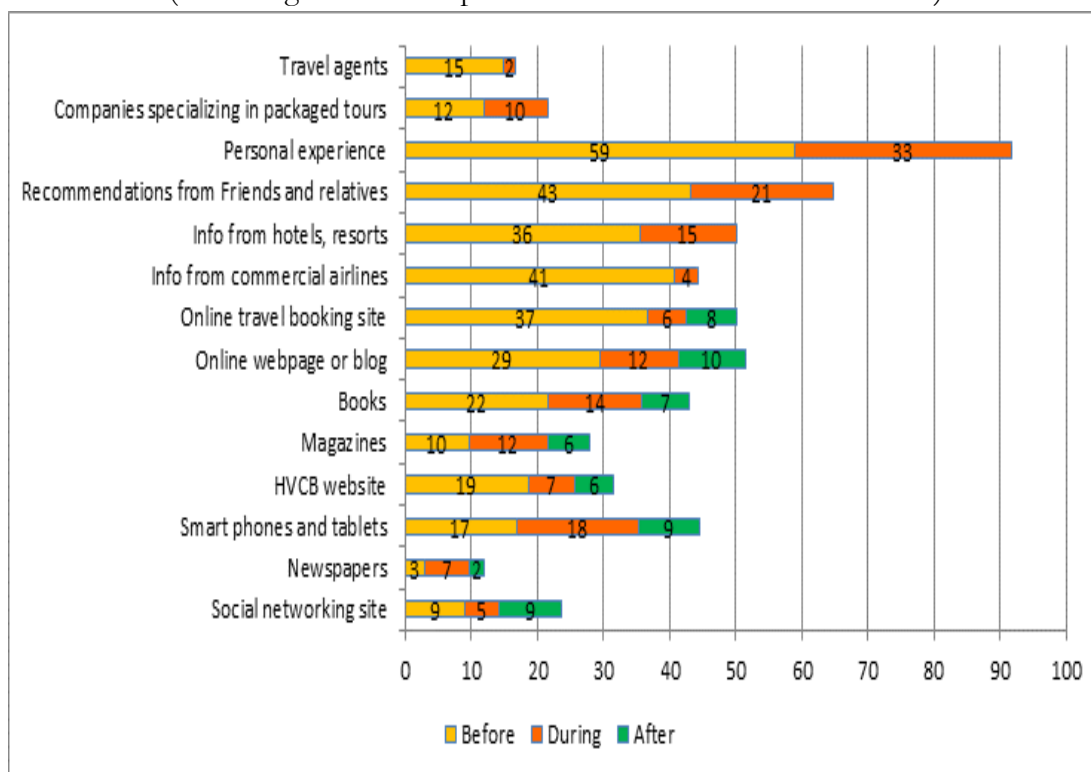


Ratings for all islands have become more similar since the second quarter of 2014. Ratings for O'ahu and Maui were fairly consistent over the last two years. In contrast, ratings for Hawai'i Islands, which was the lowest among the islands, rose sharply in 2014. Hawai'i Island ratings exceeded O'ahu's ratings and matched Maui and Kaua'i ratings since the third quarter of 2014.

## Sources of Information used for Trip Planning

Visitors to Hawai'i use a wide variety of resources to plan their trip to the islands. This section shows the sources of information used by respondents in the first quarter of 2015 by visitor market.

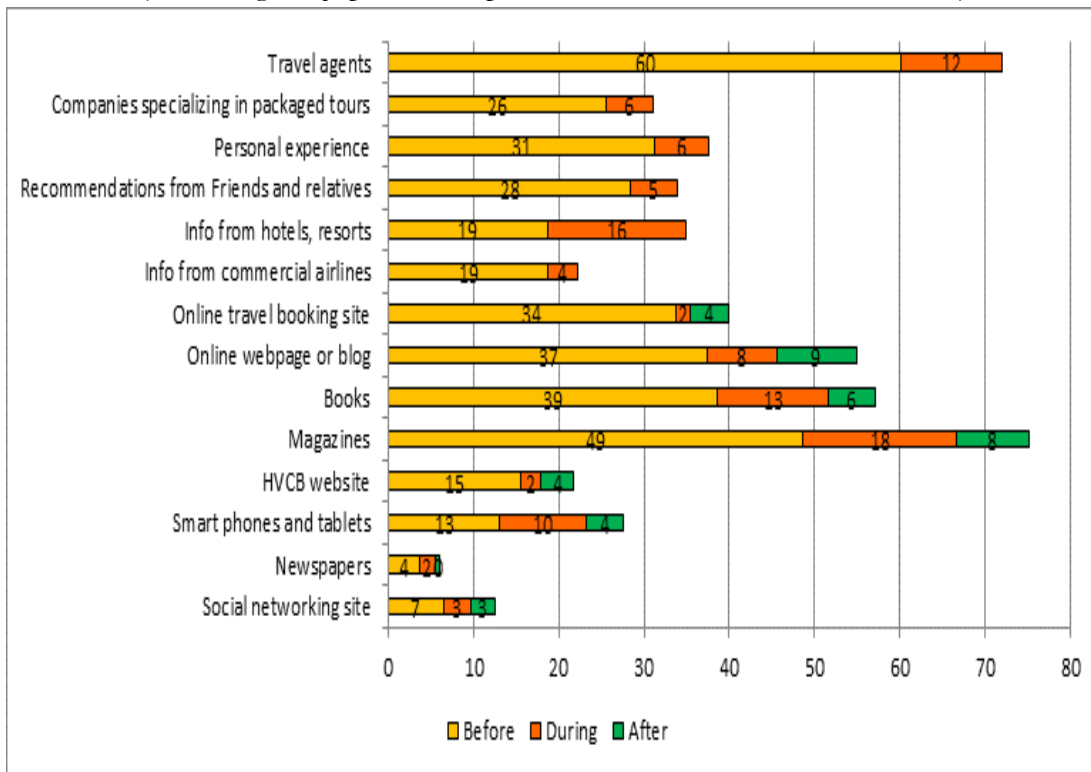
**Figure 25: Sources of Information about Hawai'i – U.S.**  
(Percentage of U.S. Respondents who used these Information)



**U.S. Visitors:** This group of visitors 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. Information from hotels and resorts, information for airlines, online travel booking sites, online webpage or blog, books, smartphones and tablets were also heavily utilized. Usage of travel agents was fairly low at 15 percent.

While their trip was in progress, many U.S. visitors used smartphones or tablets (18%), books (14%) and online webpages or blogs (12%) to find information about Hawai'i.

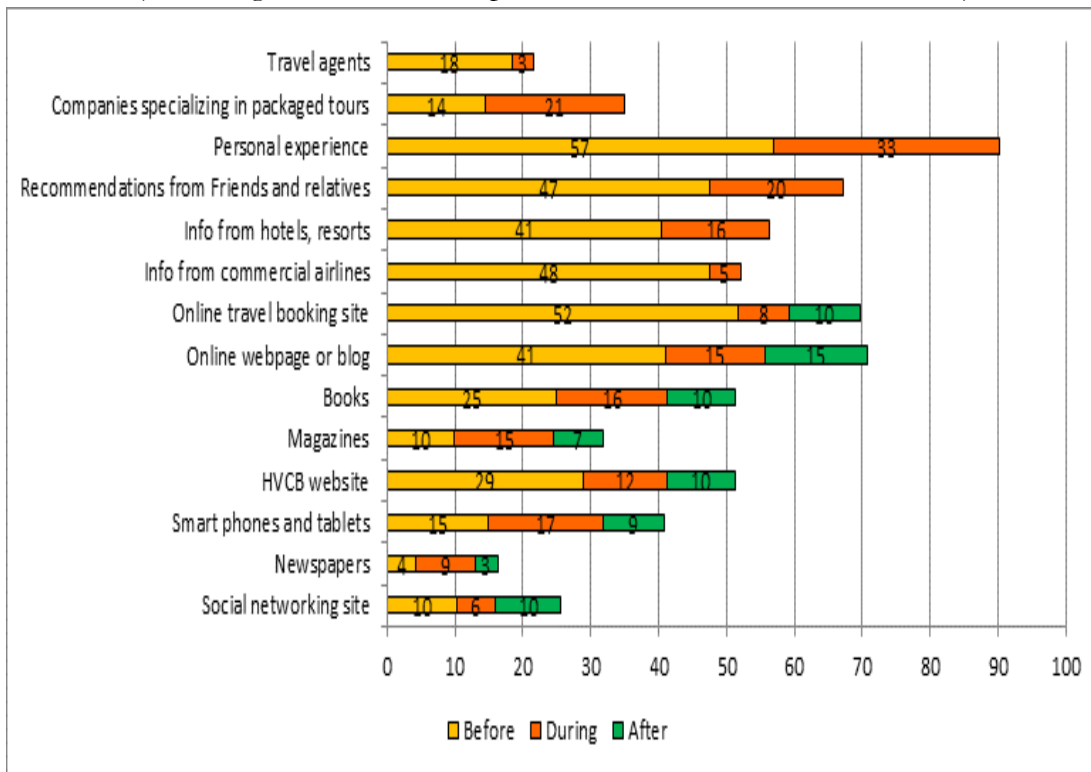
**Figure 26: Sources of Information about Hawai'i – Japan**  
 (Percentage of Japanese Respondents who used these Information)



**Japanese visitors:** Before coming to Hawai'i, Japanese visitors who arrived in the first quarter of 2015 relied less on personal experience or recommendations from friends and relatives but relied more on travel agents (60%) in trip planning. Magazines (49%), guide books (39%), and online webpages or blogs (37%) were also popular with Japanese visitors in their trip planning.

During their trip, Japanese visitors used magazines (18%), information from hotels and resorts (16%), books (13%), travel agents (12%) and smartphones and tablets (10%) to access information about Hawai'i.

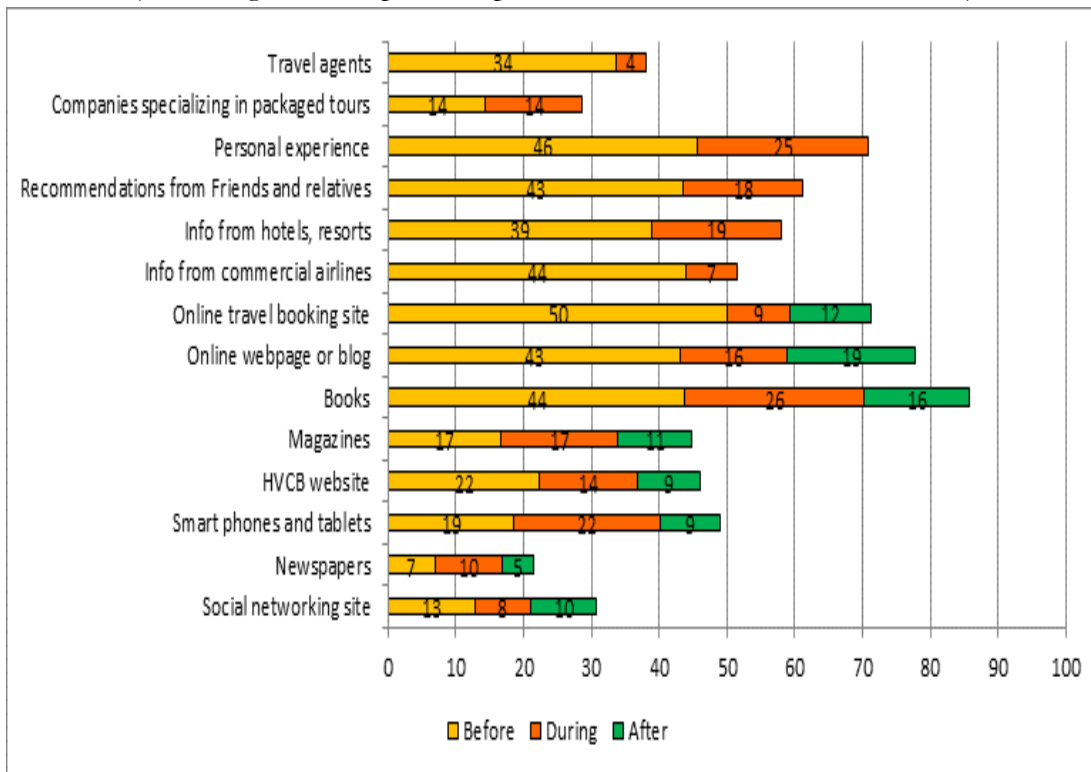
**Figure 27: Sources of Information about Hawai'i – Canada**  
 (Percentage of Canadian Respondents who used these Information)



**Canadian visitors:** Before their arrival, Canadian respondents visiting in the first quarter of 2015 relied most heavily on personal experience (57%), online travel booking sites (52%), information from airlines (48%), and recommendations from friends or relatives (47%) when planning for their trip. In addition, many Canadians used information from hotels and resorts (41%) and online webpages or blogs covering Hawai'i (41%). Only 18 percent used travel agents.

While their trip was in progress, many Canadian visitors relied on their personal experience (33%). Some used companies specializing in packaged tours (21%), recommendations from friends or relatives (20%), smartphones or tablets (17%), information from hotels and resorts (16%), books (16%), magazines (15%) and online webpages or blogs (15%) as resources.

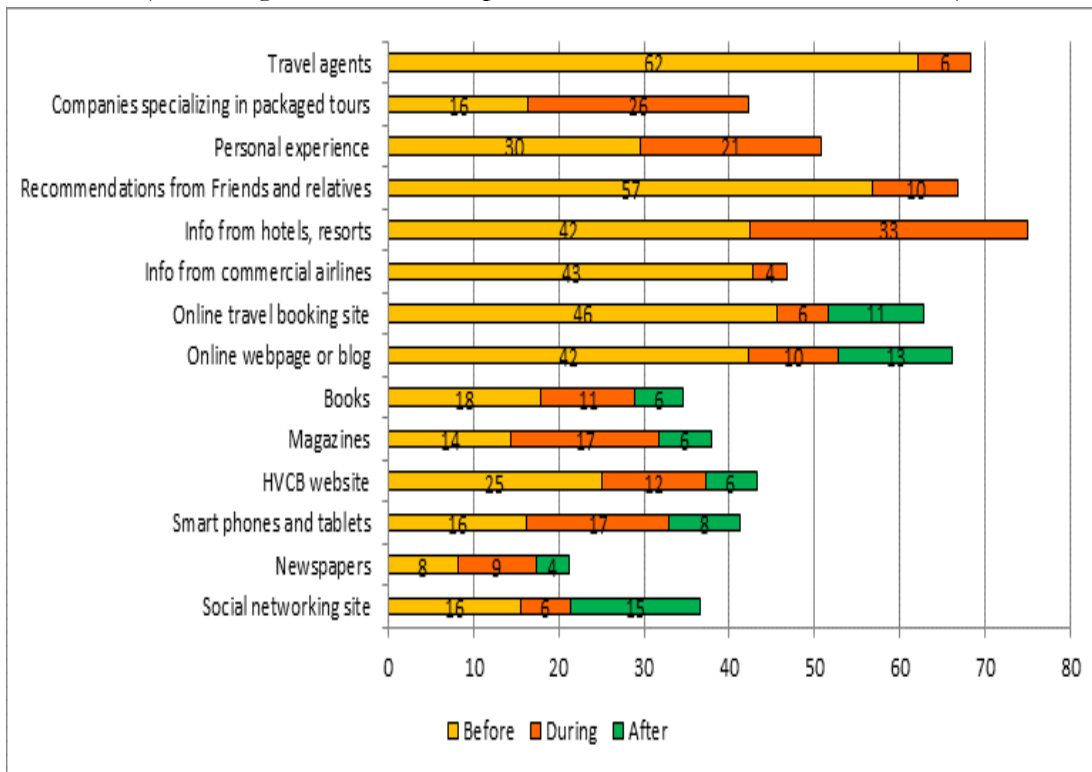
**Figure 28: Sources of Information about Hawai'i – Europe**  
 (Percentage of European Respondents who used these Information)



**European Visitors:** Among European respondents who visited in the first quarter of 2015, online travel booking sites (50%) was the most frequently used source for trip planning. Personal experience (46%), information from airlines (44%), guide books (44%), online webpages or blogs (43%), and recommendations and friends and relatives (43%) were also popular resources. One out of three respondents used travel agent.

Many European visitors used their personal experience (25%), guide books (26%), smart phones and tablets (22%) as resources during their trip. A few European visitors also used online webpages or blogs (19%) and guide books (16%) 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 (62%) as their primary source of information for trip planning before arriving to Hawai'i. Recommendations from family and friends (57%), online travel booking sites (46%), information from airlines (43%), online webpages or blogs (42%) and information from hotels and resorts (42%) were also important planning tools.

During their trip, many visitors from Oceania used information from hotels or resorts (33%) and package tour companies (26%) 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 and Europe, while visitors from Japan are mailed a Japanese language survey form. A total of 2,491 completed forms were received in the first quarter of 2015 with a margin of error of  $\pm 1.59$  percentage points at the 95 percent confidence level.

**Figure 30: Number of Surveys Collected  
January – March 2015**

MMA	Completed	Margin of Error
U.S West	755	3.77
U.S East	632	3.35
Canada	385	3.09
Japan	436	3.86
Europe	95	5.66
Oceania	166	5.66
All MMAs	2,491	1.59

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.

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