

**2007**

# **Visitor Satisfaction Monitoring Report**

**Fourth Quarter  
(October - December)**



State of Hawaii  
Department of Business, Economic Development & Tourism  
Research & Economic Analysis Division

## INTRODUCTION

This monitoring report presents selected final statistics for the 2007 Visitor Satisfaction and Activity survey. The survey measures the opinions of visitors, regarding their satisfaction with Hawai'i as a visitor destination, from five major marketing areas: U.S. West, U.S. East, Japan Canada and Europe (see Definition and Survey Methodology). The report highlights survey respondents' evaluation of the vacation experience, including: overall satisfaction with the most recent vacation to Hawai'i, trip expectations, likelihood to recommend Hawai'i, likelihood to revisit Hawai'i, reasons for not revisiting Hawai'i, satisfaction by island and trip planning timeline.

This report is available in Adobe Acrobat form on the DBEDT Website, <http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>. For further information about obtaining visitor data and other sources, contact the DBEDT Library at (808) 586-2424, or e-mail [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov) or DBEDT Research and Economic Analysis Division at (808) 586-2466.

## CONDITION OF VISITOR INDUSTRY

In the fourth quarter (October–December) of 2007, there was a total of 1,810,966 visitors to the State, a slight decline (-1.2%) from the same quarter last year. Visitor arrivals declined from U.S. West (-1.4% to 789,525), U.S. East (-5.5% to 410,181), and Japan (-4.5% to 326,549) declined.

However, visitor arrivals increased from Canada (+28.2% to 103,117) and Europe (+2.2% to 26,468). The average length of stay for all visitors to the State was slightly longer at 9.35 days compared to 9.13 days in the fourth quarter of 2006.

In the twelve months of 2007, total visitor days by air and cruise visitors grew .3 percent to 70.1 million days. A total of 7,627,819 visitors arrived by air or by cruise ships, virtually unchanged from 2006. The combined length of stay by these visitors was 9.19 days, similar to 2006. Arrivals by air declined slightly (-.4%) to 7,496,820 visitors as strong growth from Canada (+18.7%) and Oceania (+20.9%) and modest increases from U.S. West (+.8%), Other Asia (+3%), Europe (+1.9%) and Latin America (+4.9%) were offset by decline in arrivals from U.S. East (-2.7%), Japan (-4.9%), and other markets (-7.5%).

By island, a total of 4,823,874 air and cruise visitors went to O'ahu in 2007, up slightly by .7 percent from 2006. Maui (+1.7%) reported 2,580,361 air and cruise visitors, while Hawai'i Island (+2%) hosted 1,739,458 visitors. Kaua'i saw the largest increase in air and cruise arrivals, up 8 percent from 2006 to 1,372,682 visitors.

In the fourth quarter, the percentage of first-time visitors state-wide decreased .5 percentage points from 35.3 percent in 2006 to 34.8 percent in 2007. Canadian first-timers decreased 3.7 percentage points U.S. East decreased 2 percentage points, U.S. West decreased .7 percentage points and Japan declined only .2 percentage points.

# RESULTS

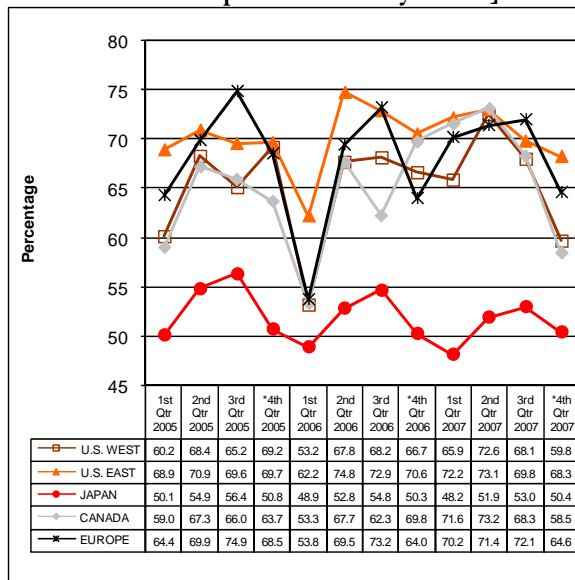
## Visitor Satisfaction Ratings

Visitor satisfaction is an important indicator of industry performance. This measure provides vital feedback on how well services are delivered and how well the industry meets expectations. High satisfaction is also a leading-indicator of customer retention and loyalty. Satisfying visitors' needs and expectations encourages return trips to Hawai'i. Satisfied customers also develop a fondness for the destination which results in a higher likelihood to recommend Hawai'i to others.

## Vacation to Hawai'i Was Rated Excellent

In general, more than half of visitors from any major marketing area rated their most recent trip to Hawai'i as *excellent* (see Figure 1).

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



- Fourth quarter 2007 U.S. East, Japan and Europe visitor ratings were similar to the ratings of the same time last year.
- Half (50.4%) of Japanese visitors in the fourth quarter of 2007 rated their trip to Hawai'i as excellent. The Japanese rating has remained consistent compared to the fourth quarter of 2005 (50.8%) and 2006 (50.3%), with no significant change, over the past four years. Japanese ratings continued to exhibit seasonal variations.
- U.S. West visitors rated the fourth quarter of 2007 (59.8%) lower than the previous year (66.7%). See Individual Island Experience and Attributes of Each Island for an analysis of the visitors' satisfaction with the specific attributes, activities and products of by island.
- Ratings from Canadian visitors were lower in the fourth quarter of 2007 (58.5%) than in the fourth quarter of 2006 (69.8%).

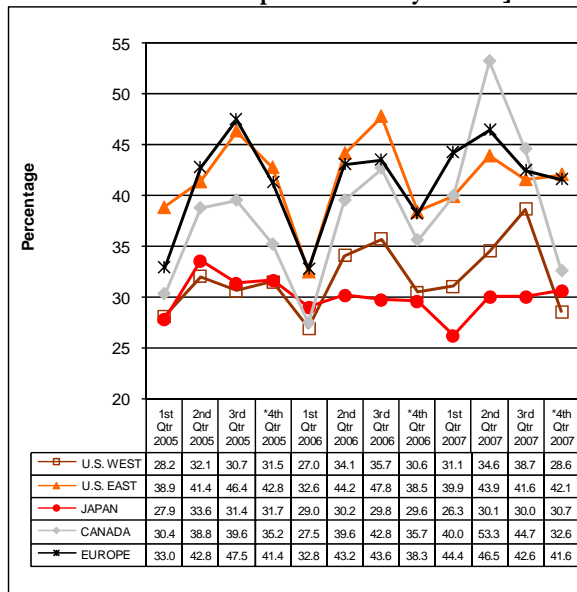
## Exceeded Expectations

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).

- U.S. West visitors reported similar marks for the fourth quarter of 2007 (28.6%) to the fourth quarter of 2005 (31.5%) and 2006 (30.6%).

- U.S. East visitors also reported similar ratings for the fourth quarter of 2007 (42.1%) compared to the fourth quarter of 2005 (42.8%) and 2006 (38.5%)
- In the fourth quarter of 2007, 30.7 percent of Japanese visitors felt that Hawai'i exceeded expectations. Ratings were fairly similar to the fourth quarter of 2006 (29.6%).
- Fourth quarter 2007 ratings from Canadian visitors (32.6%) were similar to the same period of 2006 (35.7%), despite a 12.1 percentage point decrease from the previous quarter (44.7%).
- European ratings in the fourth quarter of 2007 (41.6%) were similar to its respective quarter in 2005 (41.4%) and 2006 (38.3%).

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

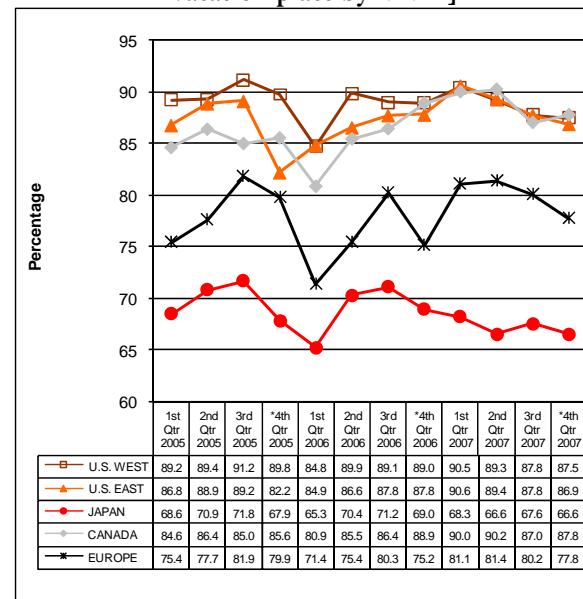


## Very Likely to Recommend Hawai'i

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.

**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]



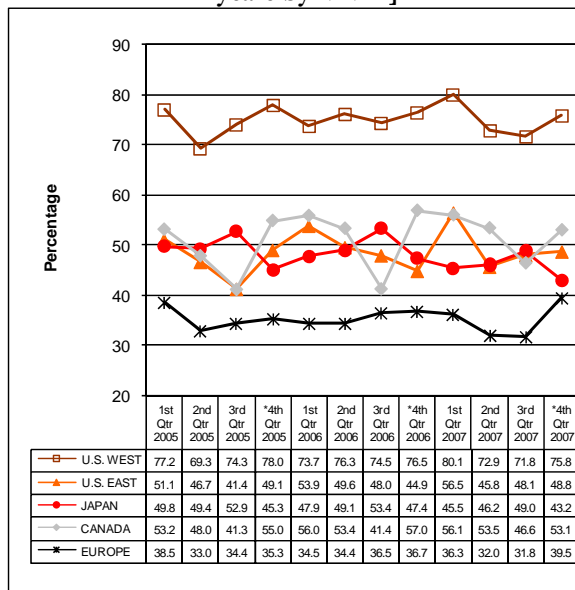
- In the fourth quarter of 2007, most of the North American visitors - U.S. West (87.5%), U.S. East (86.9%), and Canada (87.8%), continued to recommend Hawai'i to friends or relatives (see Figure 3).
- Compared to the fourth quarter of 2006 (69%), the proportion of Japanese visitors that were very likely to recommend Hawai'i in the fourth quarter of 2007 remained in the same range at 66.6 percent.
- The proportion of Canadian visitors who were willing to recommend

Hawai'i was fairly similar between the fourth quarter of 2007 (87.8%) and 2006 (88.9%).

### 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. The percentage of visitors who were *very likely to return to Hawai'i in the next five years* remained at a consistent level for most MMA and was not affected by seasonal variations (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]

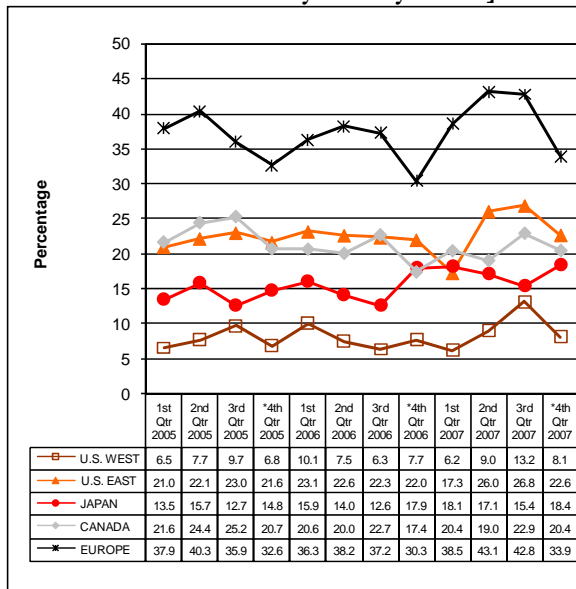


- The likelihood of U.S. West visitors revisiting Hawai'i in the next five years in the fourth quarter of 2007 (75.8%) was similar to the same period in 2006 (76.5%).
- Fourth quarter ratings from U.S. East visitors (48.8%) increased compared to fourth quarter ratings of 2006 (44.9%) and similar to the third quarter of 2007 (48.1 %).
- Fewer Japanese visitors were very likely to return to Hawai'i in the next five years in the fourth quarter of 2007 (43.2%) than in the same period of 2006 (47.4%).
- More than half of Canadian visitors in the fourth quarter of 2007 (53.1%) were likely to return in the next five years, down from the same period in 2006 (57%).
- Two out of five (39.5%) European visitors were very likely to return in the next five years, the highest level in three years.

### 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 is fairly low among U.S. West, and Japan visitors and slightly higher for U.S. East and Canadian visitors. European respondents have the highest percentage of those who will not revisit the islands in the next five years (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]

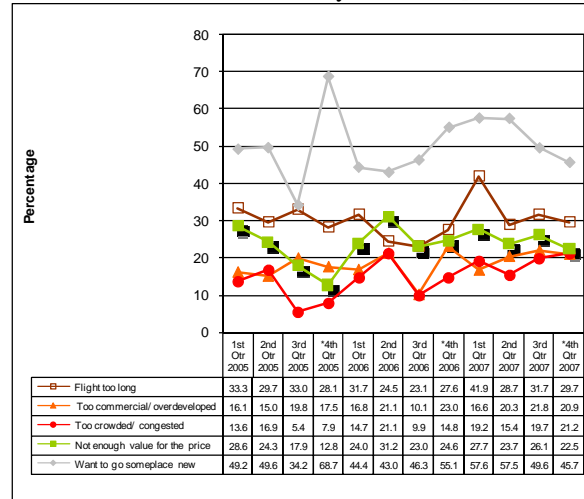


- In the first three quarters of 2007, the share of visitors', who were not likely to return in the next five years, displayed a rising trend for U.S. West, U.S. East and Europe. However, in the fourth quarter of 2007, the ratings returned to levels similar to the same time period in 2006.
- The proportions of Japanese and Canadian visitors who were not likely to revisit Hawai'i (18.4% and 20.4%, respectively) were also similar to the proportions in the fourth quarter of 2006.

**Reasons for Not Revisiting Hawai'i**

Many of the visitors not planning to return in the next five years tell us that it is because they want to go someplace else (Figure 6 and Figure 7). Note that the statistic reported for each reason for not revisiting Hawai'i is the percentage of those who were *Not Likely to Revisit Hawai'i* (from previous section).

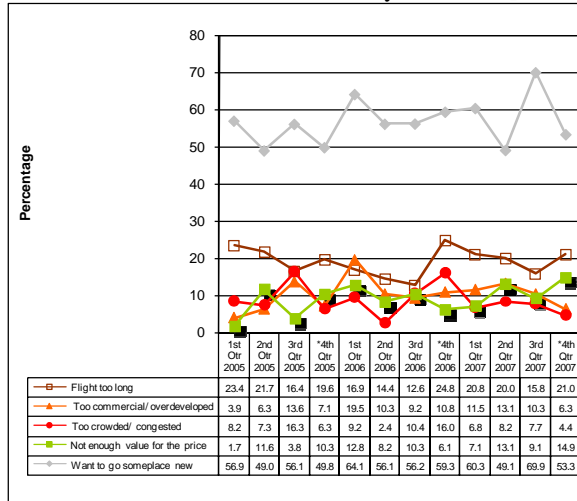
**Figure 6: Reasons for Not Revisiting Hawai'i - U.S.** [Percentage of visitors who were not likely to revisit]



- Beginning in the second quarter of 2007, there were three consecutive decreases in the proportion of U.S. visitors who wanted to visit someplace new. Of those not likely to revisit Hawai'i from the U.S., only 45.7 percent (6% of all U.S. visitors) want to go someplace new which was lower than the fourth quarter of 2005 (68.7%) and 2006 (55.1%) (see Figure 6).
- In the fourth quarter of 2007, the proportions of U.S. visitors that felt that the flight was too long (29.7% or 3.9% of all U.S. visitors), or Hawai'i was too commercial/overdeveloped (20.9% or 2.7% of all U.S. visitors) were similar to the fourth quarter of 2006.
- The proportion of U.S. visitors that felt Hawai'i was too crowded/congested (21.2% or 2.8% of all U.S. visitors) was higher than the fourth quarter of 2006 (14.8%).



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

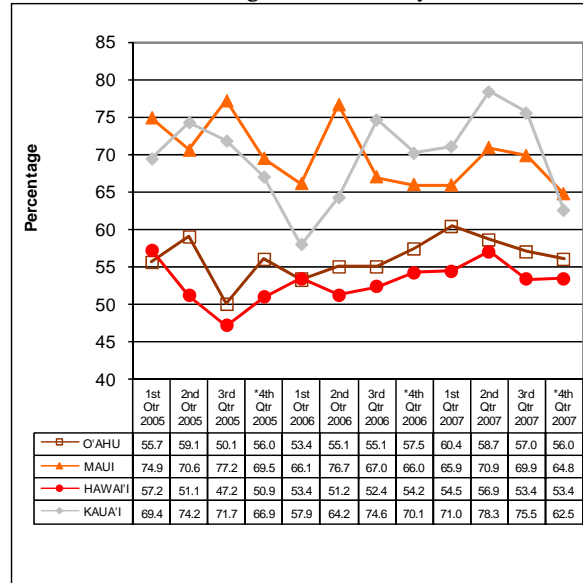


- Of the 18.4 percent of Japanese visitors who were not likely to return in the fourth quarter of 2007, 53.3 percent (9.8% of all Japanese visitors) desired to visit someplace else, a decrease from the same period in 2006 (59.3%) (Figure 7).
- In the fourth quarter of 2007, the proportion of Japanese visitors who thought there was not enough value for the price (14.9% or 2.7% of all Japanese visitors) was higher than any previous quarter and significantly higher than the same period in 2006 (6.1%).

### Individual Island Experience

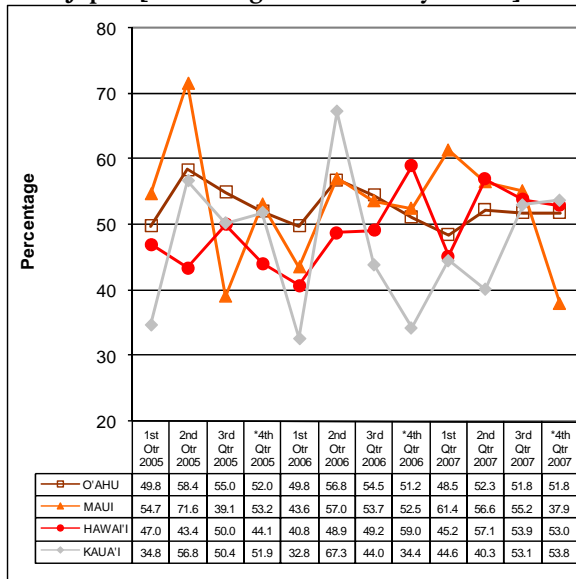
Each island has unique characteristics, activities and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip. The proportion of visitors who felt their island experience was *excellent* was down from the same time last year on all islands.

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



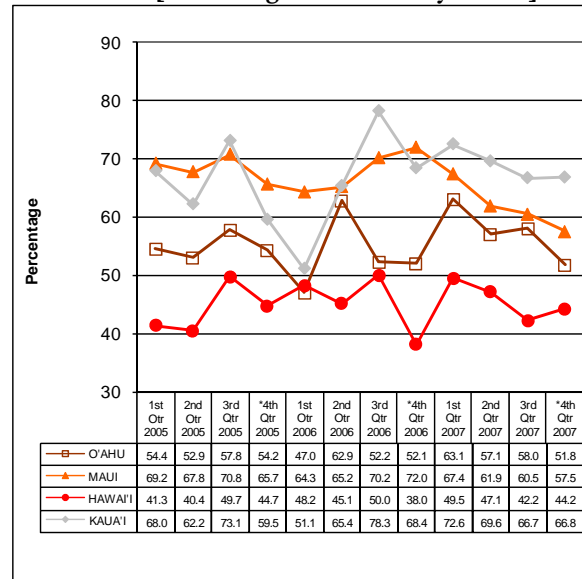
- Among U.S. visitors, visitors to Maui and Kaua'i were more likely to say they had an excellent experience than visitors to O'ahu or Hawai'i Island (see Figure 8).
- In the fourth quarter of 2007, the rating for Kaua'i was down significantly to 62.5 percent from 70.1 percent in 2006.
- O'ahu (56.0%) and Hawai'i Island (53.4%) ratings were lower than the fourth quarter of 2006, though not significantly.
- The proportion of U.S. visitors that found Maui excellent (64.8%) remained similar to the fourth quarter of 2006 (66%).
- All islands recorded higher ratings for visitor experiences in the second quarter of 2007 and then subsequent quarter-to-quarter decreases in excellent experiences through the fourth quarter.

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



- Japanese visitor satisfaction levels for the island of O'ahu in the fourth quarter of 2007 (51.8%) were similar to the fourth quarter of 2006 (51.2%) and the same as the previous quarter (see Figure 9).
- Japanese visitors had notably lower satisfaction ratings for the island of Maui (37.9%) than in any previous quarter.
- Kaua'i in the fourth quarter 2007 (53.8%) made a dramatic turn around from the same quarter in 2006 (34.4%).

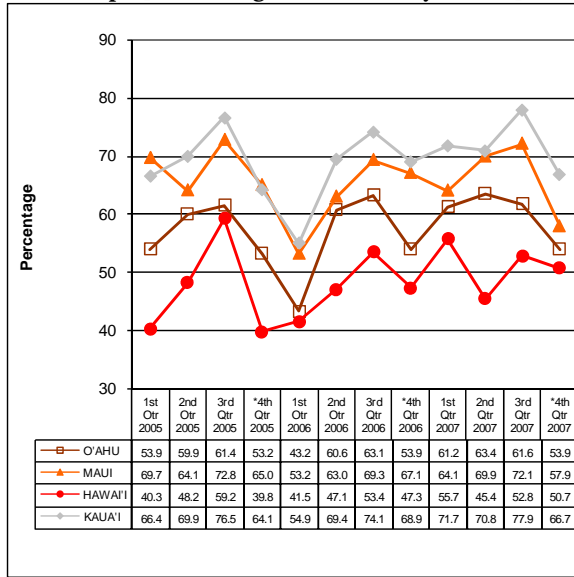
Figure 10: Island Experience Rated as Excellent - Canada [Percentage of visitors by Island]



- Similar amounts of Canadians found O'ahu (51.8%) excellent in the fourth quarter of 2007 and the fourth quarter of 2006 (52.1%) (see Figure 10).
- The proportion of Canadian visitors that rated Maui excellent (57.5%), was much lower in 2007 compared to the fourth quarter of either 2005 (65.7%) or 2006 (72%).
- In general, there was a decline in satisfaction ratings by Canadians since the first quarter of 2007, with the largest decline being on Maui.
- Hawai'i Island (44.2%) and Kaua'i (66.8%) in the fourth quarter of 2007 were similar to the rating in the fourth quarter of 2006.



Figure 11: Island Experience Rated as Excellent – Europe [Percentage of visitors by Island]



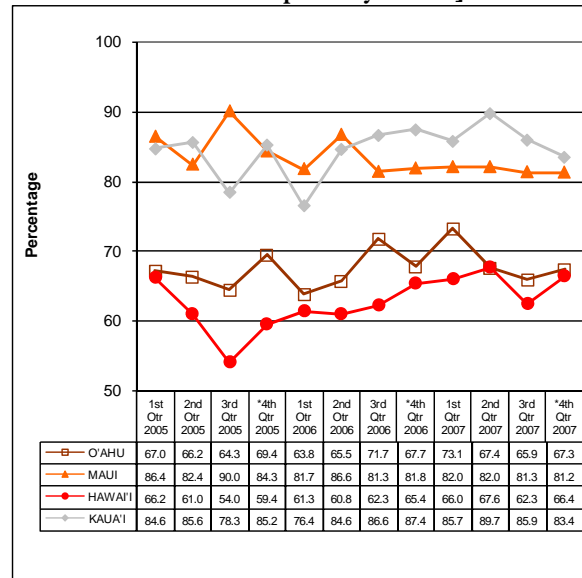
- European visitor satisfaction ratings for Maui decreased considerably from 67.1 percent in the fourth quarter of 2006 to 57.9 percent in the same period of 2007 (see Figure 11). All other islands remained fairly similar in rating for the fourth quarter of 2007 compared to 2006.

### Individual Island Recommendation

Again, when visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family. More than half of visitors continue to be *very likely to recommend* all islands to others.

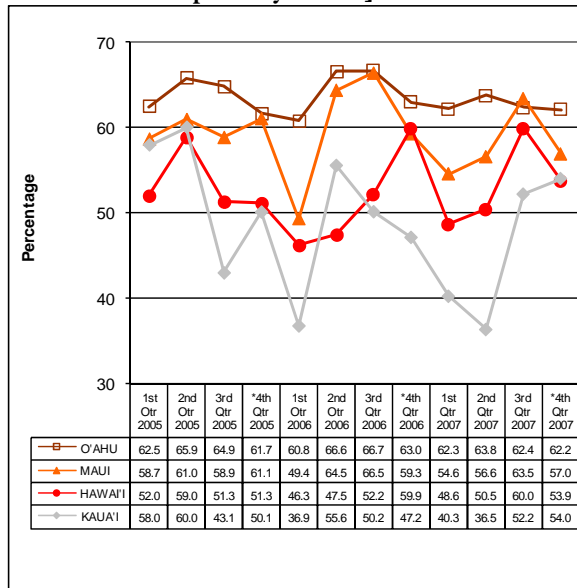
- Similar to their rating of experiences, U.S. visitors clearly were more likely to recommend Maui and Kaua'i over O'ahu and Hawai'i Island (see Figure 12).

Figure 12: Very Likely to Recommend Island – U.S. [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



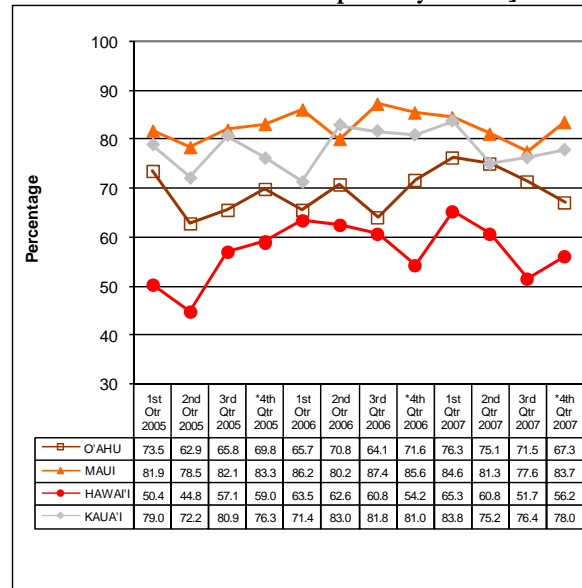
- For the fourth quarter of 2007, the proportions of U.S. visitors that were very likely to recommend O'ahu (67.3%), Maui (81.2%) and Hawai'i Island (66.4%) were similar to the same period in 2006.
- Ratings on Maui remained quite consistent since the third quarter of 2006.
- The proportion of U.S. visitors who were very likely to recommend Kaua'i (83.4%) was lower than ratings from the fourth quarter of either 2005 (85.2%) or 2006 (87.4%).

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



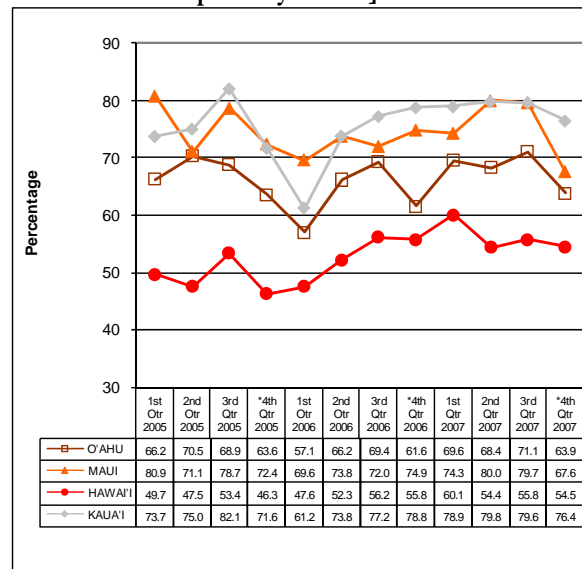
- For the fourth quarter of 2007, Kaua'i (54.0%) received much higher ratings by Japanese visitors compared to the fourth quarter of 2006 (47.2%) (see Figure 13).
- Ratings by Japanese visitors for O'ahu remained about the same throughout 2007.
- Fourth quarter ratings in 2007 for Maui (57%) and Hawai'i Island (53.9%), by Japanese visitors, were lower than at the same time in 2006 (59.3% and 59.9%, respectively).
- Canadian visitors' 2007 fourth quarter ratings for O'ahu (67.3%) were lower compared to last year's fourth quarter ratings. At the same time, ratings for Maui (84.3%), Hawai'i Island (56.2%) and Kaua'i (78%) were similar (see Figure 14).

Figure 14: Very Likely to Recommend Island – Canada [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



- The proportion of European visitors who were very likely to recommend Maui was lower in the fourth quarter of 2007 (67.6%) than the same period of either 2005 (72.4%) or 2006 (74.9%) (see Figure 15).

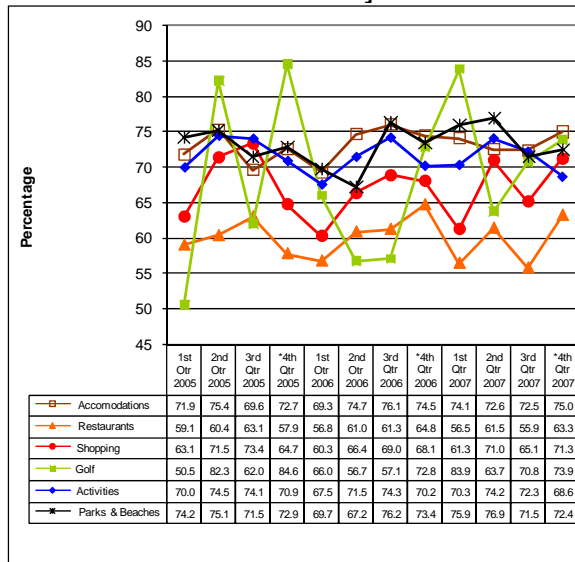
Figure 15: Very Likely to Recommend Island - Europe [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]



## Attributes of Each Island

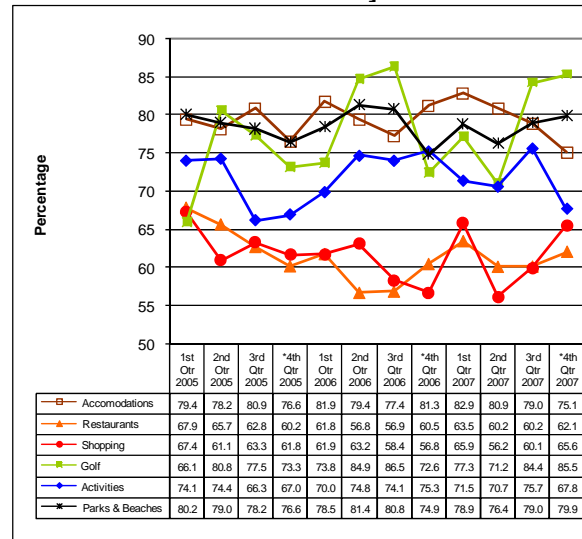
Analysis of the visitors' satisfaction with the specific attributes, activities and products of each island may help us to identify the underlying reasons for changes in individual island experiences. Visitors were asked to rate how satisfied they were with certain attributes of their trip. The satisfaction rating was determined by the percentage of those who were "Very Satisfied" by an attribute.

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



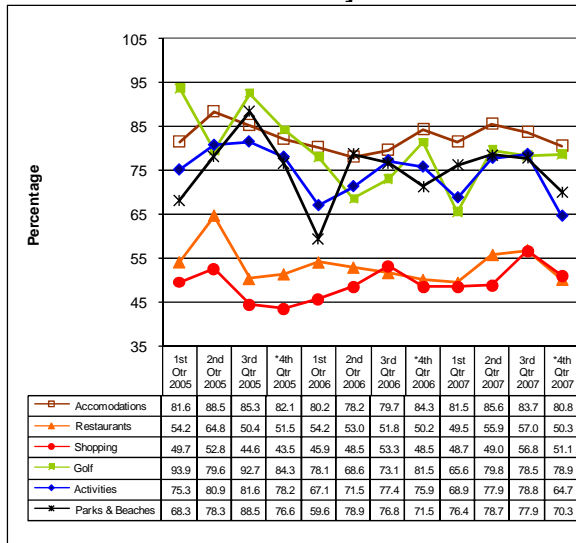
- U.S. visitors on O'ahu were similarly satisfied with the island's accommodations (75.0%), golf (73.9%), parks and beaches (72.4%) and shopping (71.3%) in the fourth quarter of 2007 as during the same period in 2006 (see Figure 16).

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



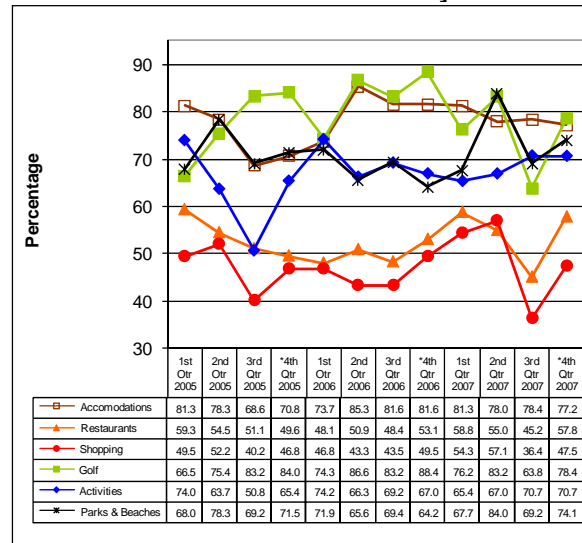
- In the fourth quarter of 2007, the proportion of U.S. visitors who enjoyed Maui's shopping (65.6%), golf (85.5%) and parks and beaches (79.9%) improved from the last quarter of 2006.
- The proportion of U.S. visitors in the fourth quarter of 2007 who enjoyed Maui's accommodations (75.1%) and activities (67.8%) were lower than at the same period in 2006.

**Figure 18: Detailed Satisfaction Ratings for U.S. Visitors to Kaua'i [Percentage of U.S. visitors to Kaua'i who were "Very Satisfied" with Attribute]**



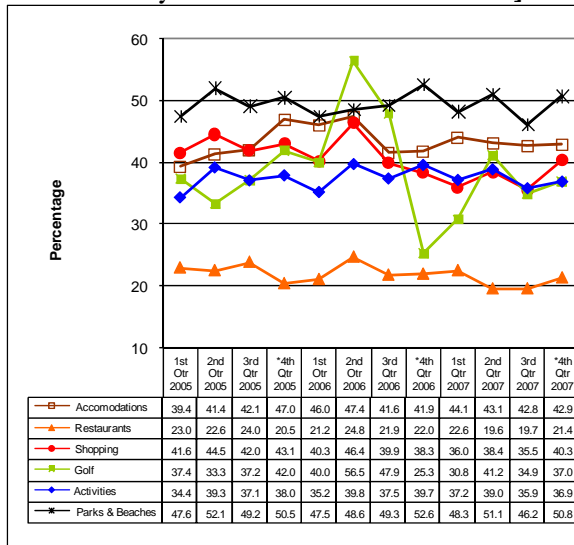
- In the fourth quarter of 2007, U.S. visitors to Kaua'i were less satisfied with the activities (64.7%) compared to the same period in 2006 (75.9%), the lowest rating in the past three years.
- U.S. visitors to Kaua'i gave satisfaction ratings for the island's shopping (51.1%) that were higher in the fourth quarter of 2007 than the same quarter of either 2005 (43.5%) or 2006 (48.5%) (see Figure 18).

**Figure 19: 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]**



- Fourth quarter ratings in 2007 from U.S. visitors regarding golf on the Hawai'i Island decreased considerably (-10 percentage points) from 2006 fourth quarter ratings (88.4%). Yet, golf still remained the highest rated attribute for the island. Ratings for the island's parks and beaches (74.1%) improved (+9.9 percentage points) over the same period last year (see Figure 19).

**Figure 20: Detailed Satisfaction Ratings for O‘ahu – Japan**  
 [Percentage of Japan visitors to O‘ahu who were “Very Satisfied” with the Attribute]

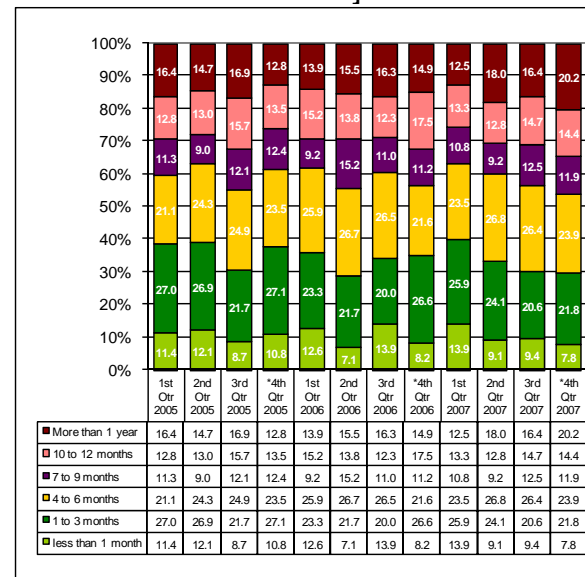


- Japanese visitor ratings regarding O‘ahu’s golf in the fourth quarter of 2007 (37%) showed improvement over the fourth quarter of the previous year (25.3%) (see Figure 20).
- Japanese visitors’ satisfaction ratings regarding O‘ahu’s accommodations (42.9 percent in 4<sup>th</sup> quarter 2007), has been relatively stable since the third quarter of 2006 but lower than the period between the fourth quarter of 2005 and the second quarter of 2006.
- Satisfaction with O‘ahu’s activities and parks and beaches (36.9 percent and 50.8 percent, respectively, in the fourth quarter of 2007) has been very consistent over the past three years.
- Satisfaction with O‘ahu’s restaurants continued to be the attribute (21.4%) given the lowest rating by Japanese visitors.

## Trip Planning Cycle

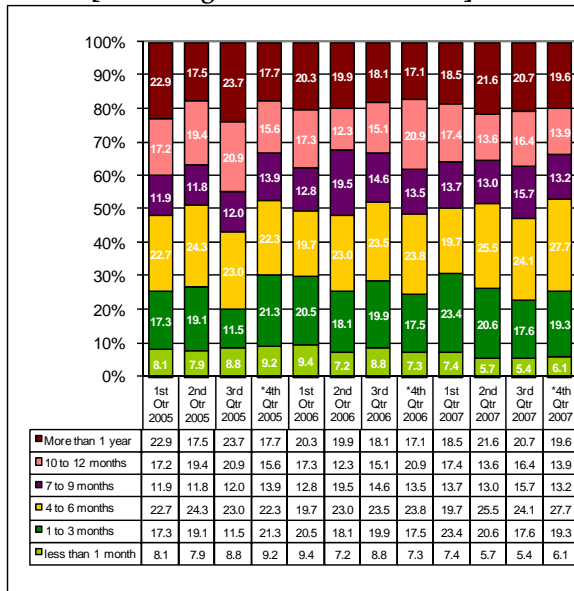
Information on how visitors plan their trips and when they make major decisions can greatly enhance preparation of effective marketing and promotion plans.

**Figure 21: When Did U.S. West Visitors Decide to Visit Hawai‘i in Advance of Departure [Percentage of U.S. West visitors]**



- In general, 60 to 70 percent of the U.S. West visitors decided to come to Hawai‘i four months or more before arriving (see Figure 21).
- For the fourth quarter of 2007, one out of five (20.2%) U.S. West visitors decided to come to Hawai‘i more than one year before arriving.

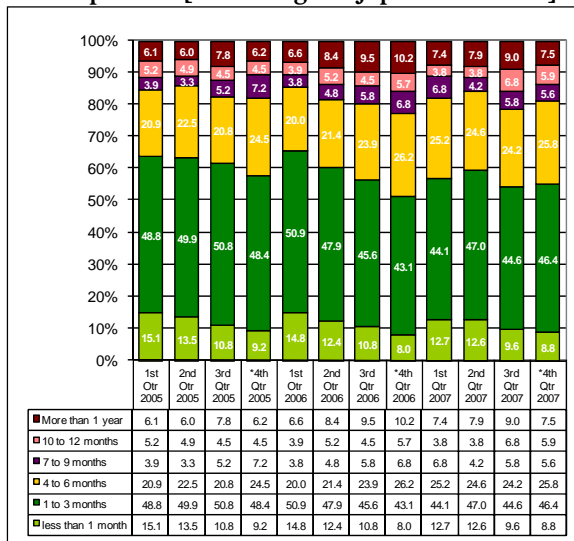
**Figure 22: When Did U.S. East Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of U.S. East visitors]**



- In the fourth quarter of 2007, 55.2 percent of Japanese visitors decided to come to Hawai'i only three months or less before arrival. This proportion of visitors has been fairly consistent since the first quarter of 2007 (see Figure 23).

- Compared to previous quarters since 2005, the proportion of U.S. East visitors who decided to come to Hawai'i four to six months before arriving was the highest (27.7%) in the fourth quarter of 2007 (see Figure 22).

**Figure 23: When Did Japan Visitors Decide to Visit Hawai'i in Advance of Departure [Percentage of Japanese visitors]**

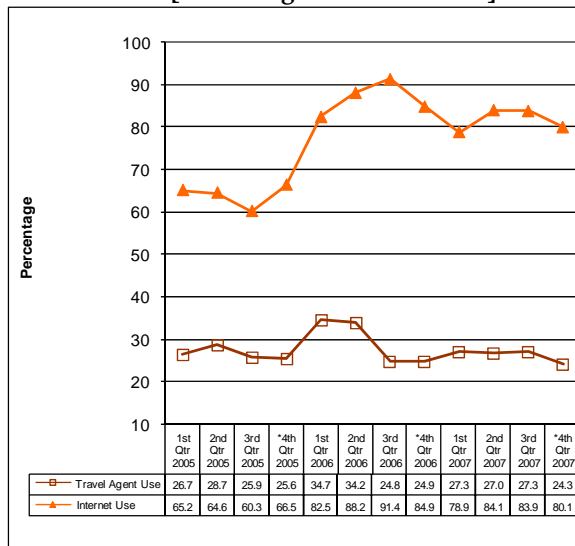




## Internet and Travel Agent Use

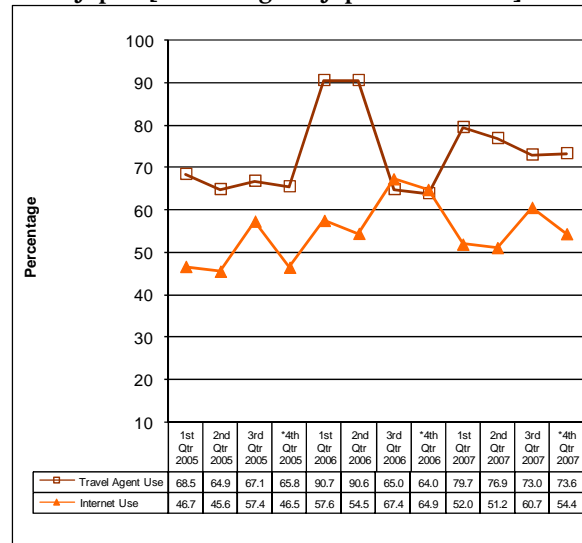
The use of the Internet or a travel agent for trip planning and booking differs quite appreciably between U.S. and Japanese travelers to Hawai'i.

Figure 24: Internet and Travel Agent Use -- U.S. [Percentage of U.S. visitors]



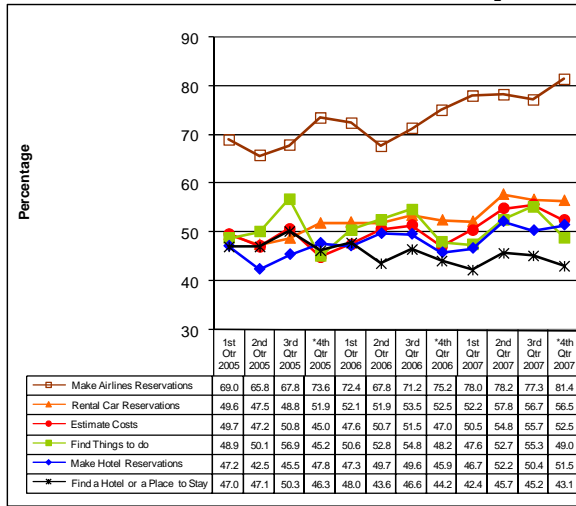
- For U.S. visitors, Internet use has been in the range of 80 to 90 percent of visitors. Compared to the fourth quarter of 2006, Internet use decreased 4.8 percentage points to 80.1 percent of all U.S. visitors to Hawai'i.
- Travel agent use, meanwhile, remained at between one-quarter to one-third of visitors (24.3% in the fourth quarter of 2007) and has remained fairly stable since the third quarter of 2006 (see Figure 24).

Figure 25: Internet and Travel Agent Use - Japan [Percentage of Japanese visitors]



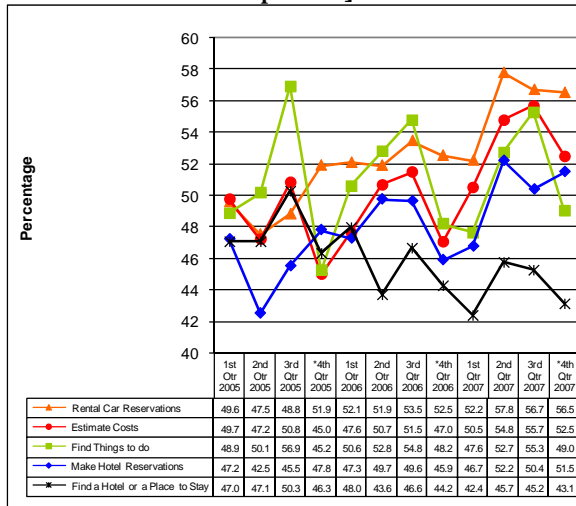
- Japanese travel agent users were more prevalent than Internet users. In the fourth quarter of 2007, travel agent users made up 73.6 percent of all Japanese visitors. The proportion of travel agent users gained notably from 64 percent of total Japanese visitors in the fourth quarter of 2006 (see Figure 25).
- Internet usage remained around 50 percent and was at 54.4 percent of Japanese visitors in the fourth quarter of 2007. Internet use for the fourth quarter of this year was lower compared to the same quarter of 2006 (64.9%).

**Figure 26: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet]**



- The proportion of U.S. Internet users that made airline reservations reached a high of 81.4 percent (or 65% of all U.S. visitors) compared to previous quarters (see Figure 26).

**Figure 27: Internet Use – U.S. [Percentage of U.S. visitors who used the Internet - scale expanded]**

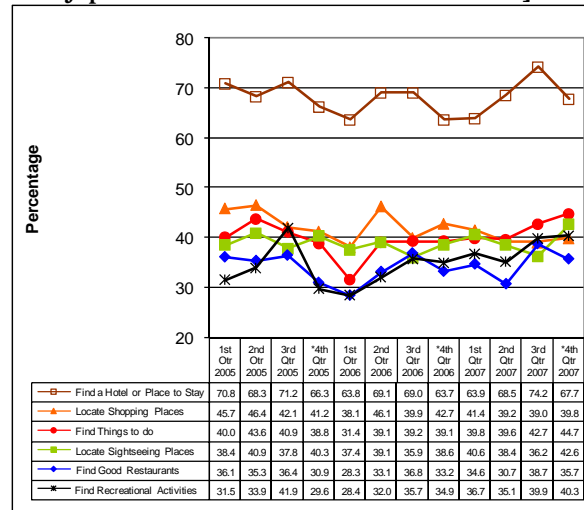


- The percentages of U.S. Internet users in the fourth quarter of 2007 who made rental car reservations (56.5% or 45.3% of all U.S. visitors), estimated costs (52.5% or 42.1% of all U.S. visitors) or

to make hotel reservations (51.5% or 41.3% of all U.S. visitors) through Internet use were higher than the same quarter of the past year (see Figure 27).

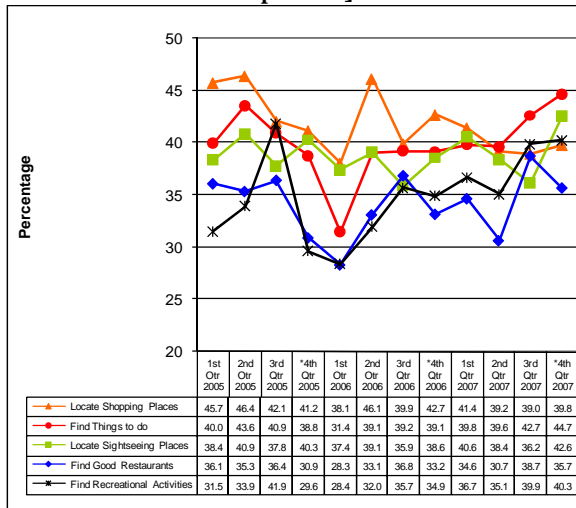
- Using the Internet to find an accommodation was still the least utilized method (43.1% or 34.5% of all U.S. visitors) in the fourth quarter of 2007.

**Figure 28: Internet Use – Japan [Percentage of Japanese visitors who used the Internet]**



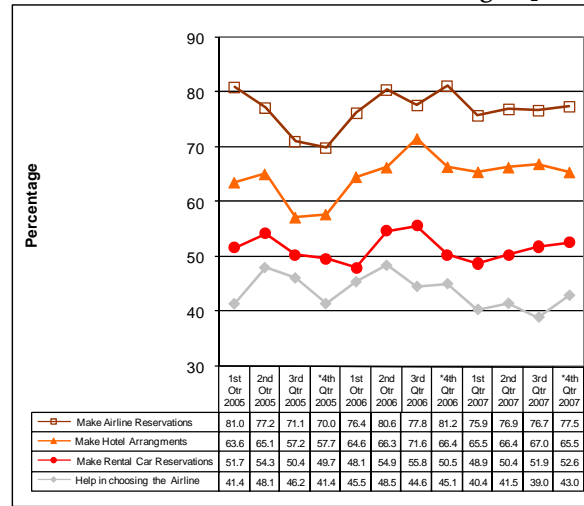
- For the fourth quarter of 2007, Japanese users were mainly interested in finding an accommodation (67.7% or 36.8% of all Japanese visitors). Other activities continued to draw less than half of all Japanese Internet users (see Figure 28).

Figure 29: Internet Use – Japan [Percentage of Japanese visitors who used the Internet - scale expanded]



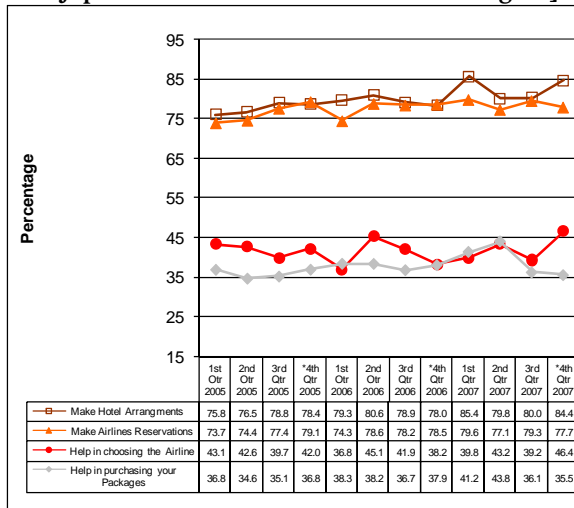
- Compared to previous quarters, Internet use among Japanese visitors to find recreational activities (40.3% or 21.9% of all Japanese visitors) and sightseeing places (42.6% or 23.2% of all Japanese visitors), was higher in the fourth quarter of 2007 (see Figure 29).
- Internet use by Japanese visitors in the fourth quarter of 2007 (44.7% or 24.3% of all Japanese visitors) to find things to do has increased since the fourth quarter of 2006 to its highest level.

Figure 30: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]



- Most U.S. visitors who used a travel agent made airline reservations (77.5% or 18.8% of all U.S. visitors). This proportion has remained consistent since the first quarter of 2007 (see Figure 30).
- The proportions of U.S. visitors who used a travel agent to make hotel arrangements (65.5% or 15.9% of all U.S. visitors) or rental car reservations (52.6% or 12.8% of all U.S. visitors), have remained consistent since the third quarter of 2006.

**Figure 31: Use of Travel Agent – Japan [Percent of Japanese visitors who used a Travel Agent]**



- The use of travel agents by Japanese visitors was generally to make hotel arrangements (84.4% or 62.1% of all Japanese visitors) or airlines reservations (77.7% or 57.2% of all Japanese visitors).
- The use of travel agents to help choose the airline in the fourth quarter of 2007 (46.4% or 25.2% of all Japanese visitors) was higher than the fourth quarter of 2006 (38.2%).

## DEFINITION AND SURVEY METHODOLOGY

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

Survey questionnaires were mailed to selected U.S., Japanese, Canadian and European visitors after they have returned home. The U.S. samples were drawn from the completed Domestic In-Flight Survey forms (Basic Data Series). The Japanese, Canadian, and European 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., Canadian and European visitors. The 2007 survey has 8 pages and 33 questions.

**Table 1: Sample Size  
October - December 2007**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	3,000	950	31.7%	+/- 3.2
U.S.	5,950	1,527	25.7%	+/- 2.5
Canada	3,050	815	26.7%	+/- 3.4
Europe				

Due to the low number of samples achieved, data for Lāna'i and Moloka'i were not presented in most of the data tables in this report.

The collected data was weighted to adjust for differences with the actual visitor characteristics measured in the Basic Data Series caused by sampling and non-responses. Specifically, the data was weighted during analysis to reflect the actual visitor ratio of first-timers to repeat visitors and the proportion of O'ahu only and Neighbor island visitors.

This report is available in Adobe Acrobat form on the DBEDT Website, <http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>.

For further information about obtaining visitor data and other sources, contact the DBEDT Library at (808) 586-2424, or e-mail [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov) or DBEDT Research and Economic Analysis Division at (808) 586-2466.