

**2007**

# **Visitor Satisfaction Monitoring Report**

**Second Quarter  
(April - June)**



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

## INTRODUCTION

This monitoring report presents selected preliminary 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 the top 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 of partial year data is due to an initiative by DBEDT Tourism Research Branch to increase the frequency of reporting to quarterly and half-year intervals when possible. This brief report tracks only the major satisfaction indicators. The annual 2007 Visitor Satisfaction and Activity Report, which includes a more complete analysis for the full calendar year 2007, is scheduled for release in August 2008. It is hoped that visitors' feedback reported here will help Hawai'i's businesses take proactive measures in promotion, maintenance and improvement in these essential areas. Sectors of industries may also use these data to assess their performance.

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 second quarter (April – June) of 2007, there were a total of 1,833,507 visitors to the State, a slight decline of 0.7 percent from the same quarter last year. Visitor arrivals from U.S. West with 835,440 (+0.5%), U.S. East with 492,677 (+1.6%) improved only slightly, while Canada with 47,678 (+7.2%) showed a large gain. However, visitor arrivals from Japan declined 3.7 percent to 293,567. The average length of stay for all visitors to the State was 8.9 days, a mere 1.1 percent increase.

The first six months of 2007 experienced a slight decline in our visitor industry after three years of growth. The State of Hawai'i entertained a total of 3,616,086 visitors, a decrease of 0.6 percent over the same time last year. U.S. West continued to grow with 1,540,805 visitors (+4.1%) in the first two quarters of 2007 and Canada with 155,106 visitors (+1.2%). However, U.S. East with 994,651 visitors (-2.1%) and Japan with 617,996 visitors (-7.4%) declined in visitor arrivals. The average length of stay of all visitors remained steady (-.4%) at 9.17 days. The proportion of repeat visitors to the State continued to inch up from 63.2 percent in the first six months of 2006 to 64.1 percent in 2007.

## 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

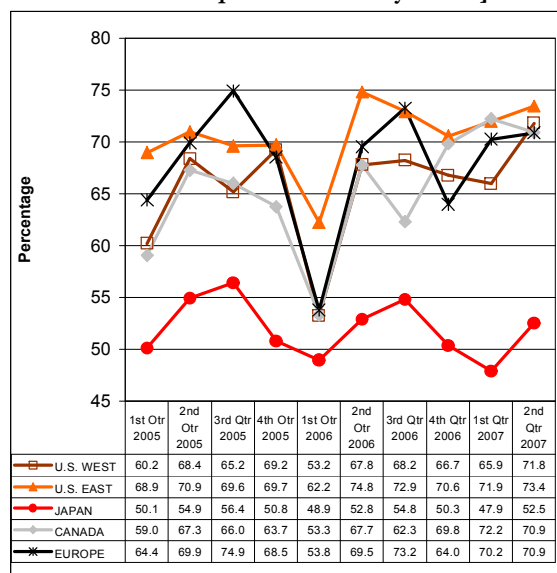
In nearly every quarter more than half of the visitors rated their most recent trip to Hawai'i as *excellent* (see Figure 1). Interestingly, this indicator of visitor satisfaction demonstrated a very seasonal pattern, with typically the first quarter reported the lowest rating for each year. Ratings from U.S. West, Canada and Europe were higher in the second quarter of 2007 than in the second quarter of either 2005 or 2006.

- More U.S. West visitors had an excellent trip (71.8%) in the second quarter of 2007 than at any other time in the past two years. In this quarter, U.S. West visitors elevated their rating of Hawai'i following a rather level period between the second quarter of 2006 (67.8%) and the first quarter of 2007 (65.9%).
- Slightly fewer U.S. East visitors rated their stay as excellent in the second quarter of 2007 (73.4%) than a year ago (74.8%).
- Second quarter ratings from Japanese visitors (52.5%) were similar to the same period in 2006 (52.8%), despite lower ratings in the previous quarter (47.9%). Current ratings continue to show the historical trend of lower first and fourth

quarters and higher second and third quarters.

- Canadian visitors' rating was up 3.2 percentage points (70.9%) compared to the second quarter of 2006 (67.7%).
- European visitors' rating for the second quarter of 2007 (70.9%) was fairly consistent compared to the second quarters of 2005 (69.9%) and 2006 (69.5%).

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



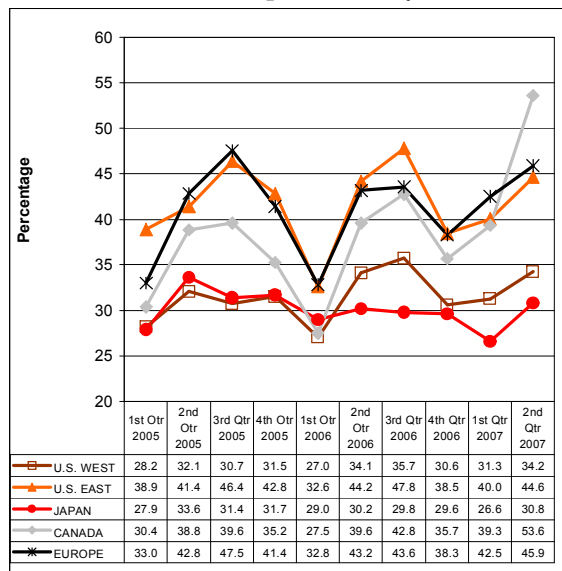
### Exceeded Expectations

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. Similar to the overall ratings, the ability to *exceed expectations* exhibits a seasonal pattern, with the first quarter lower than other times of the year. U.S. and Japanese visitors felt that their trip exceeded expectations similar to the

second quarter of 2006. At the same time, more Canadian and European visitors felt that their trip exceeded expectations compared to the second quarter of 2006 (see Figure 2).

- U.S. West visitors reported similar ratings for the second quarter of 2007 (34.2%) and 2006 (34.1%).
- Ratings by U.S. East visitors remained rather comparable between the second quarter of 2007 (44.6%) and 2006 (44.2%).
- The percentage of Japanese visitors who felt that their trip to Hawai'i exceeded expectations in the second quarter of 2007 (30.8%) was also similar to the second quarter of 2006 (30.2%).
- In the second quarter of 2007, ratings from Canadian visitors (53.6%) improved significantly with a gain of 14 percentage points compared to the second quarter of 2006 (39.6%).

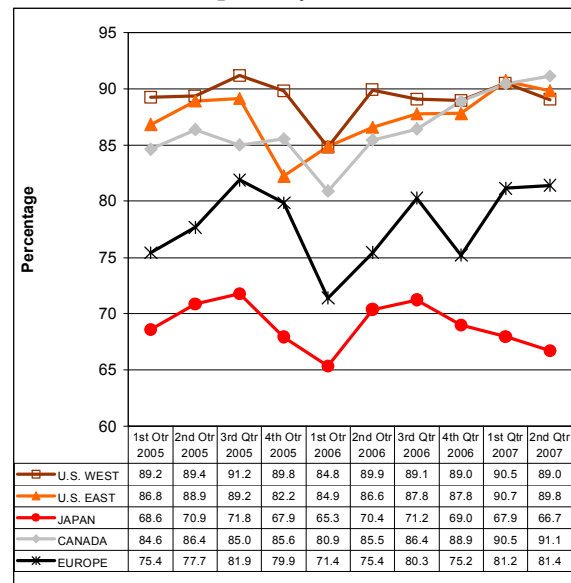
**Figure 2: Trip Exceeds Expectations**  
[Percentage of visitors who said this trip "Exceeded Expectation" by MMA]



### Very Likely to Recommend Hawai'i

When visitors are highly satisfied with their trip, they may be more likely to recommend the destination to friends and family. Many Hawai'i visitors reported they would 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 second quarter of 2007, the percentage of U.S. West visitors that were very likely to recommend Hawai'i (89%) has remained consistent since the second quarter of 2006 (89.9%).
- U.S. East (89.8%) and European (81.4%) visitors were more likely to recommend Hawai'i as a vacation place in the second quarter of 2007 than in the same quarter of the previous year.

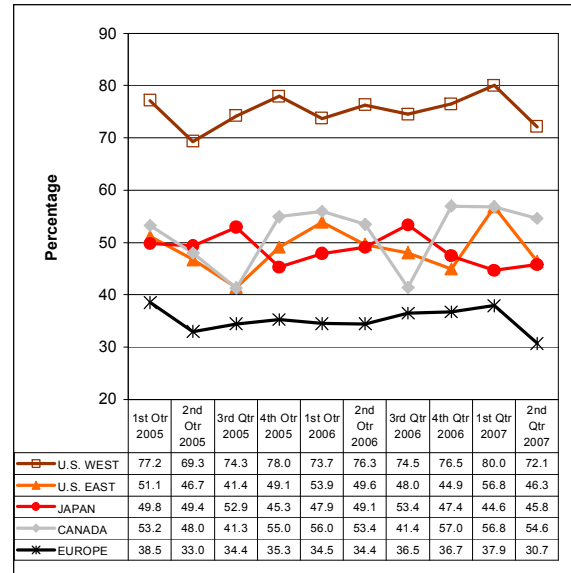
- The proportion of Japanese visitors that were very likely to recommend Hawai'i was lower in the second quarter of 2007 (66.7%) than the second quarter of 2006 (70.4%). Japanese visitors willingness to recommend Hawai'i has been on a steady decline since the third quarter of 2006 (71.2%).
- Canadian visitors in the second quarter of 2007 (91.1%) were more willing to recommend Hawai'i than the same time a year ago (85.5%). This upward trend has been persistent since the first quarter of 2006 (80.9%).

(48%) and similar to the 2006 (53.4%). rating. Canadians show a strong seasonal difference between the lower scoring third quarter summer visitors and visitors from other times of the year.

### 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 also 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]**



- For the second quarter of 2007, the number of U.S West (72.1%), U.S. East (46.3%), Japanese (45.8%), and European (30.7%) visitors who were very likely to revisit Hawai'i in the next five years was lower than the previous year.
- The proportion of Japanese visitors that were very likely to return to Hawai'i was at a lower level in the second (45.8%) quarter of 2007 than in 2006 (49.1%).
- The number of Canadian visitors that were very likely to revisit Hawai'i in the second quarter of 2007 (54.6%) was greater than the second quarter of 2005

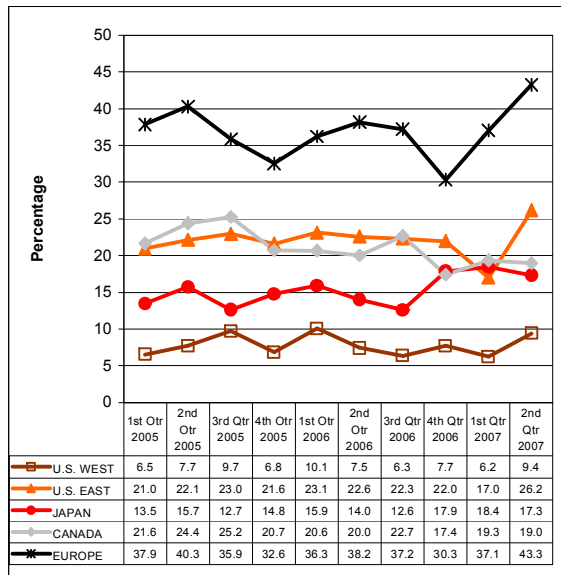
- Due to factors such as distance and the desire to take advantage of favorable exchange rates to explore new places, fewer Europeans (30.7% in 2<sup>nd</sup> Quarter 2007) were very likely to return in the next five years. The percentage of those who were very likely to return was at its lowest point in the past two years and has decreased 7.2 percentage points from the previous quarter (37.9%).

### 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 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]



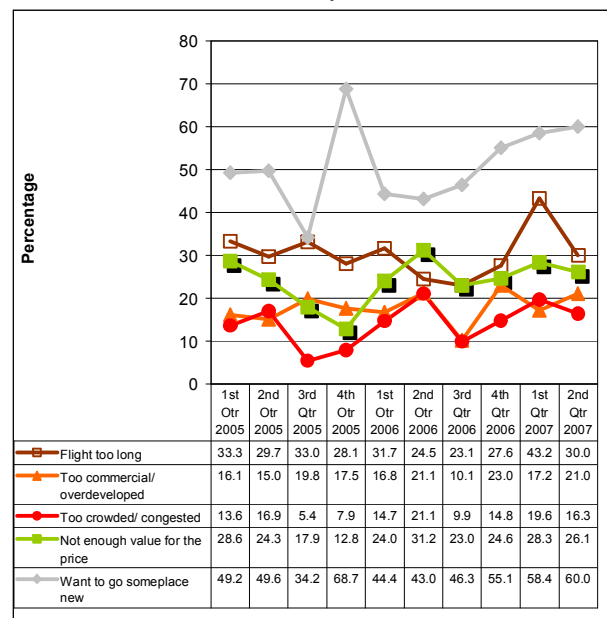
- The proportion of Japanese (17.3% in 2<sup>nd</sup> Quarter 2007) visitors not likely to revisit Hawai'i jumped up in the fourth quarter of 2006 and has remained consistently at that level.
- In the second quarter of 2007, the unlikelihood to revisit Hawai'i in the next five years by U.S. East visitors (26.2%) increased 3.6 percent points from the previous year (22.6%).
- Canadian (19%) visitors that were not likely to revisit Hawai'i in the next five years has remained constant since the fourth quarter of 2006.
- The percentage of European visitors that were not likely to return has increased 13 percentage points since the fourth quarter of 2006 to 43.3 percent.

## Reasons for Not Revisiting

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).

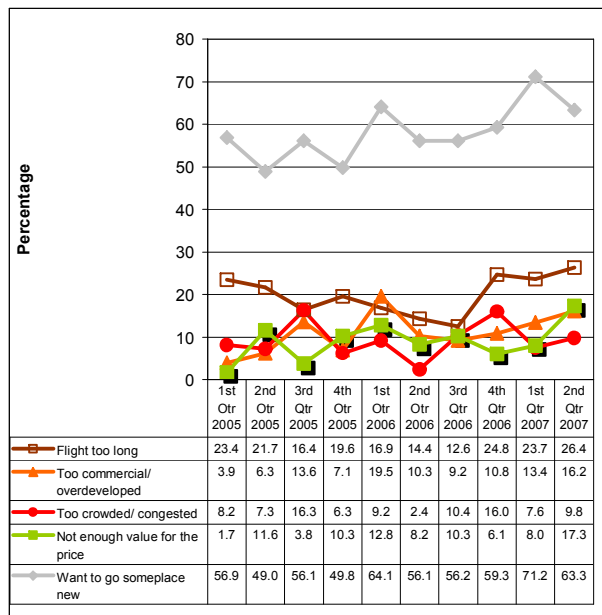
- Over the past year, there has been a constant increase of U.S. visitors who were not likely to return and instead wanted to visit someplace new. For the past three quarters, this amount has remained over 50 percent.
- In the second quarter of 2007, the number of U.S. visitors that felt that the flight was too long increased 5.5 percentage points to 30 percent from the second quarter of 2006.
- "Too crowded/congested" was typically the lowest response. Furthermore, the proportion of U.S. visitors who reported this issue appeared to have decreased from 21.1 percent in the second quarter of 2006 to 16.3 percent in 2007.

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



- For the Japanese visitors in the second quarter of 2007, the desire to visit someplace else has increased to 63.3 percent from 56.1 percent in the same period of 2006. This figure has remained above the fifty percent mark for all of 2006 and into 2007.
- “Flight too long” has increased as a major concern to Japanese visitors from 14.4 percent in the second quarter of 2006 to 26.4 percent of respondents in the second quarter of 2007.

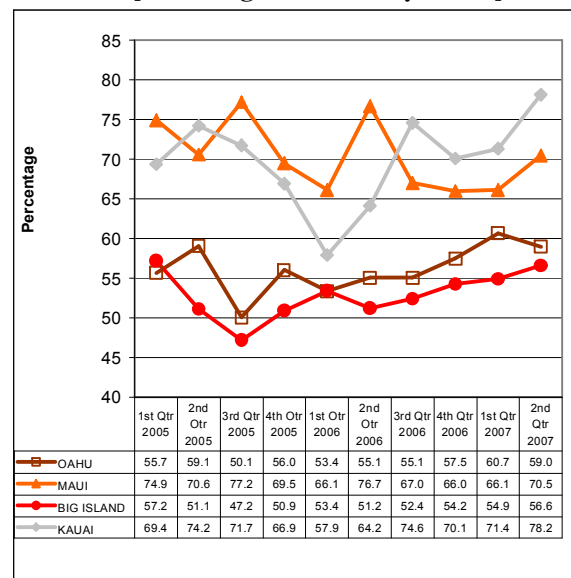
**Figure 7: Reasons for Not Revisiting Hawai'i - Japan [Percentage of visitors who were not likely to revisit]**



visitors to O‘ahu or the Big Island of Hawai‘i (see Figure 8).

- Satisfaction ratings on Kaua‘i among U.S. visitors reached its highest rating in the second quarter of 2007 (78.2%), 14 percentage points more than the second quarter of 2006. U.S. visitors’ experience on Maui (70.5%) was lower than the previous year (76.7%).
- The percentage of U.S. visitors that found Hawai‘i Island excellent in the second quarter of 2007 (56.6%) was greater than the same quarter of the previous year (51.2%).

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



### Individual Island Experience

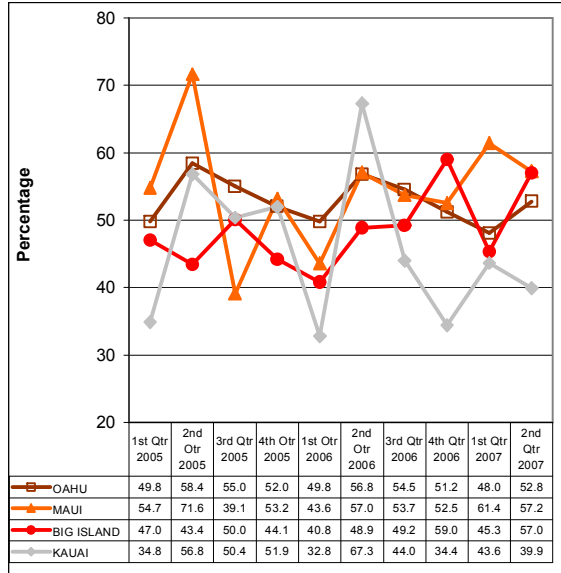
Each island has unique characteristics, activities and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip.

- Among U.S. visitors, those who went to Maui and Kaua‘i were more likely to say they had an excellent experience than

- Maui (57.2%) and Hawai‘i Island (57%) were the most highly rated islands by Japanese visitors in the second quarter of 2007 (see Figure 9).
- The Big Island of Hawai‘i showed improvement from 48.9 percent in the second quarter of 2006 to 57 percent in 2007.
- However, Japanese visitors to Kaua‘i noted a much lower level of satisfaction

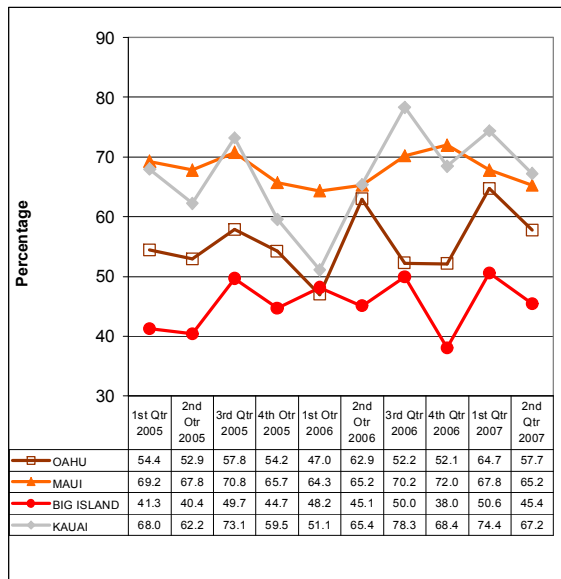
(39.9%) than the same time last year (67.3%).

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



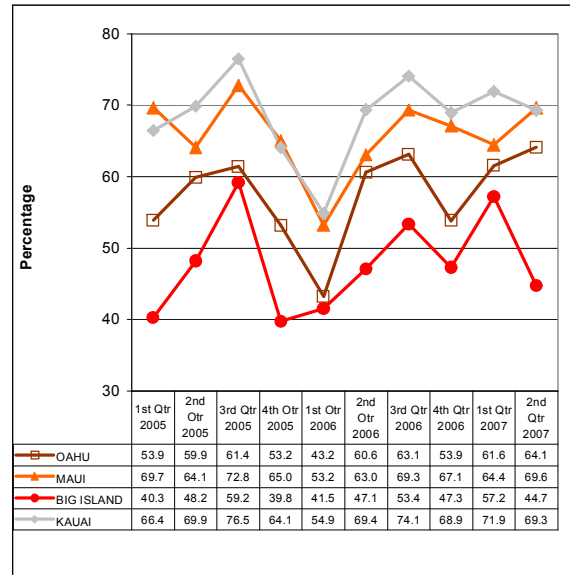
- Slightly more Canadians found Kauai (67.2%) excellent in the second quarter of 2007 than in second quarter of 2006 (65.4%) (see Figure 10).

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



- European visitors reported higher ratings for Maui (69.6%) and Kauai (69.3%) in the second quarter of 2007 (see Figure 11). While European visitors' ratings for Oahu and Maui increased (+3.5 and +6.6 percentage points respectively) from the same quarter last year, ratings for Kauai remained relatively the same.

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



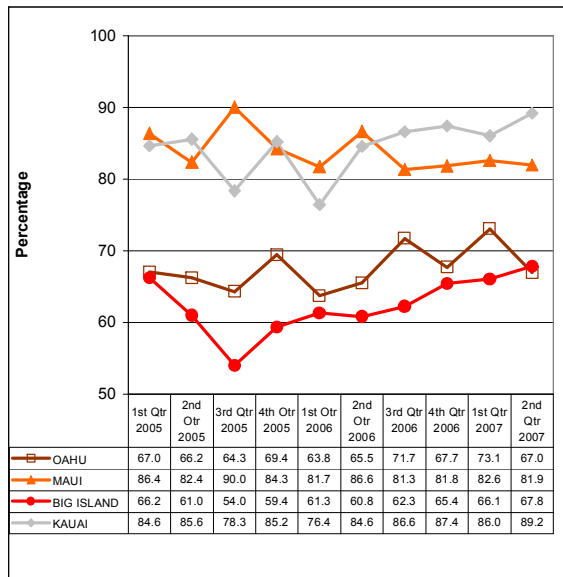
### Individual Island Recommendation

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

- Similar to their rating of experiences, U.S. visitors over the past three years have continually stated that Maui and Kauai were more likely to be recommended than Oahu and Hawaii Island (see Figure 12).
- Hawaii Island has made steady improvements, resulting in the second quarter of 2007 (67.8%) gaining over the same time in 2006 (60.8%).

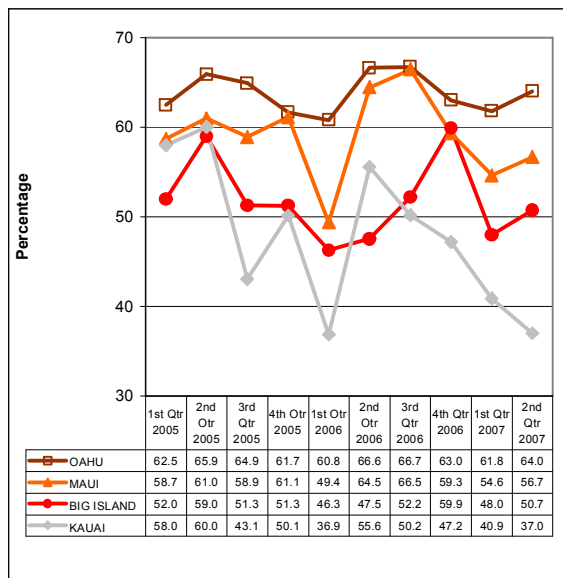


**Figure 12: Very Likely to Recommend Island – U.S. [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**



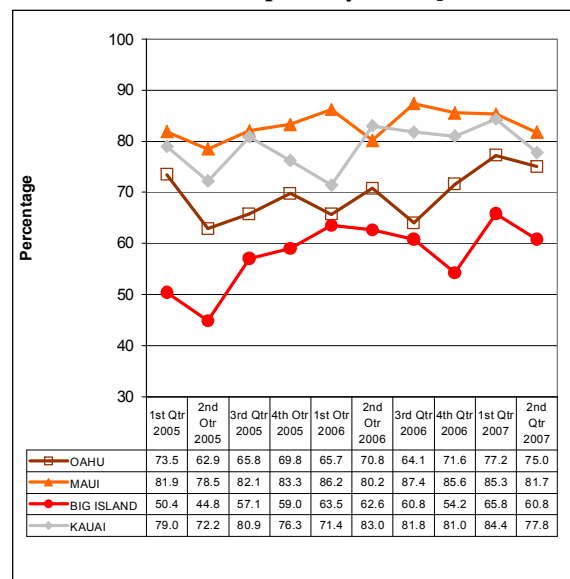
- The number of Japanese visitors that were very likely to recommend Kaua'i has been declining since the second quarter of 2006 (55.6%) to 37 percent in the second quarter of 2007.

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



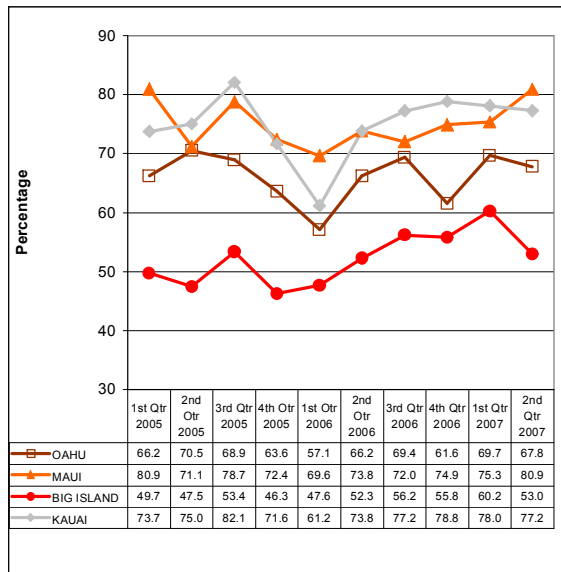
- For the second quarter of 2007, O’ahu (64%) and Maui (56.7%) received lower ratings than the second quarter of 2005 and 2006. Japanese visitors in the first quarter of each year tend to give the lowest ratings, indicating a seasonal difference (see Figure 13).

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

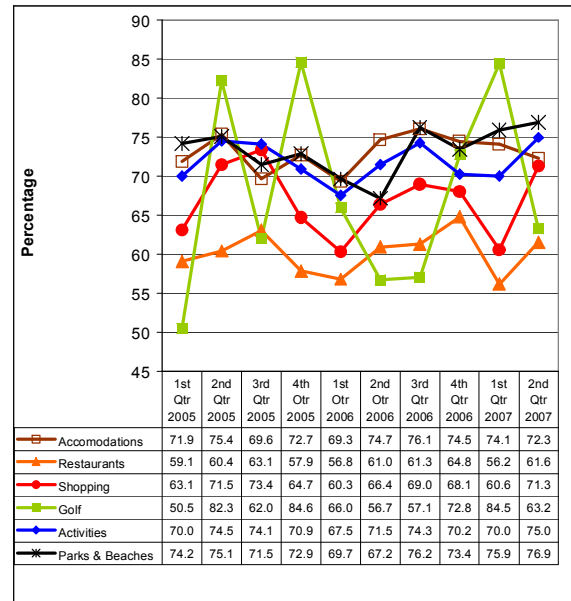


- Historically, Canadian visitors’ ratings for Maui also displayed a seasonal pattern in which the second quarter of each year received lower proportions of Canadian visitors that would recommend the island. The second quarter for this year was very similar (81.7%) to the same quarters in 2005 (78.5%) and 2006 (80.2%) (see Figure 14).
- For the second quarter of 2007, European visitors were more likely to recommend Maui (80.9%) to their family and friends than the other islands (see Figure 15). Maui also made great improvement from the second quarter of 2006 (73.8%).

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



**Figure 16: Detailed Satisfaction Ratings for O’ahu – U.S. [Percentage of U.S. visitors to O’ahu]**

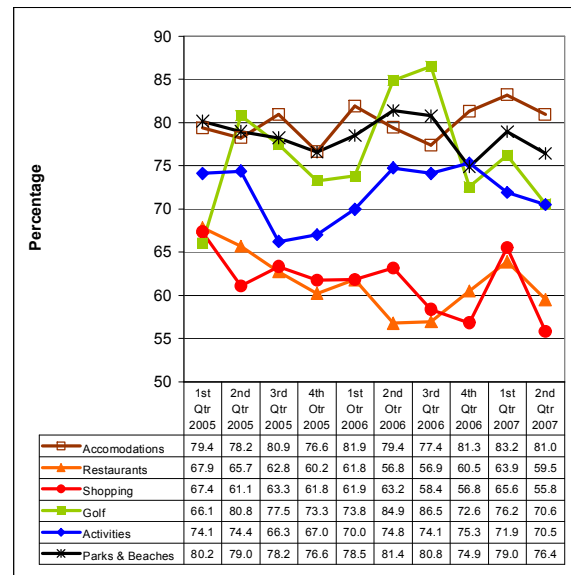


### Attributes of Each Island

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.

- U.S. visitors on O’ahu were most satisfied (76.9%) with the island’s parks and beaches in quarter two of 2007 (Figure 16).
- The number of U.S. visitors who were very satisfied with O’ahu’s golf decreased 21.3 percentage points from the previous quarter to 63.2 percent.

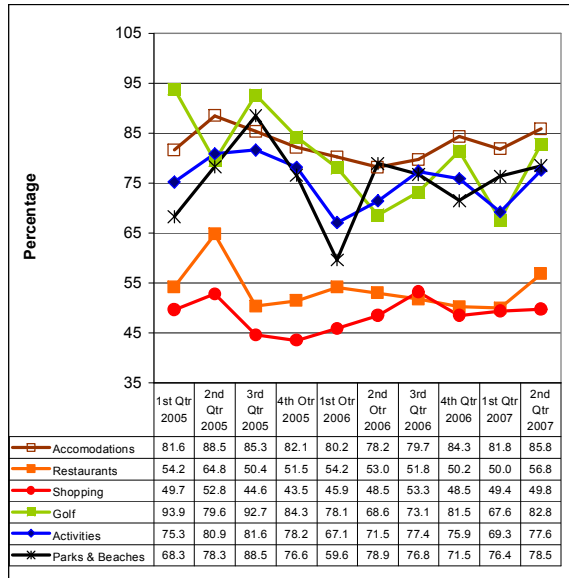
**Figure 17: Detailed Satisfaction Ratings for U.S. Visitors to Maui [Percentage of U.S. visitors to Maui]**



- Among attributes, Maui’s accommodations (81%) was still ranked the highest by U.S. visitors, followed by the island’s parks and beaches (76.4%), golf (70.6%) and activities (70.5%) Shopping on Maui

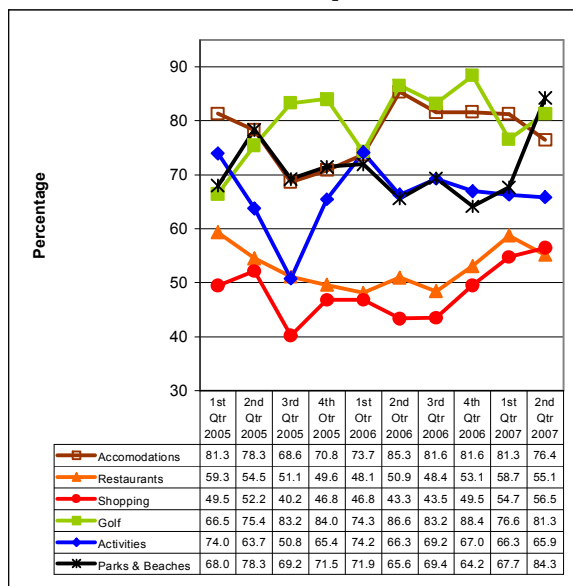
(55.8%) had the lowest rating in the second quarter of this year. (Figure 17).

**Figure 18: Detailed Satisfaction Ratings for U.S. Visitors to Kaua'i**  
[Percentage of U.S. visitors to Kaua'i]



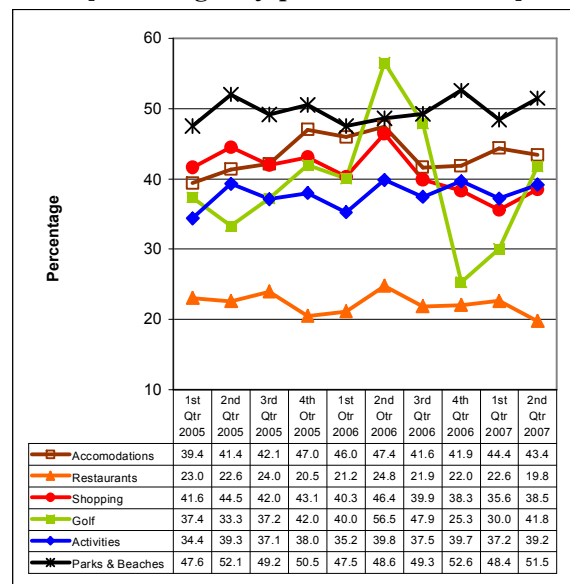
- Accommodations remain the best attribute on Kaua'i (85.8%) while restaurants (56.8%) and shopping remain relatively lower (49.8%) (Figure 18).

**Figure 19: Detailed Satisfaction Ratings for U.S. Visitors to Hawai'i Island**  
[Percentage of U.S. visitors to Hawai'i Island]



- U.S. visitors felt that they were the most satisfied with Hawai'i Island's parks and beaches in the second quarter of 2007. As it grew 18.7 percentage points from the second quarter of 2006 (65.6%) (Figure 19).
- Ratings from U.S. visitors regarding shopping on Hawai'i Island (56.5%) has improved (+13.2 percentage points) from the same quarter in the previous year.

**Figure 20: Detailed Satisfaction Ratings for O'ahu – Japan**  
[Percentage of Japan visitors to O'ahu]



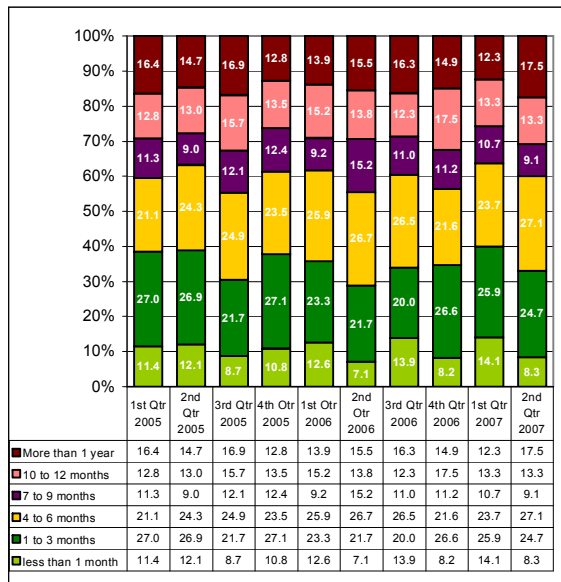
- Japanese visitors are most satisfied with O'ahu's parks and beaches (51.5%) and to a lesser extent it's accommodations (43.4%).
- Japanese visitors' rating of O'ahu restaurants remained relatively low in the second quarter of 2007 (19.8%) which was lower than the same time last year (24.8%).
- Japanese visitors' satisfaction with O'ahu's golf courses was highest in the second quarter of 2006 (56.5%), dramatically decreased in the fourth quarter of 2006 (25.3%), and was at 41.8 percent in the second quarter of 2007 (see Figure 20).

## 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.

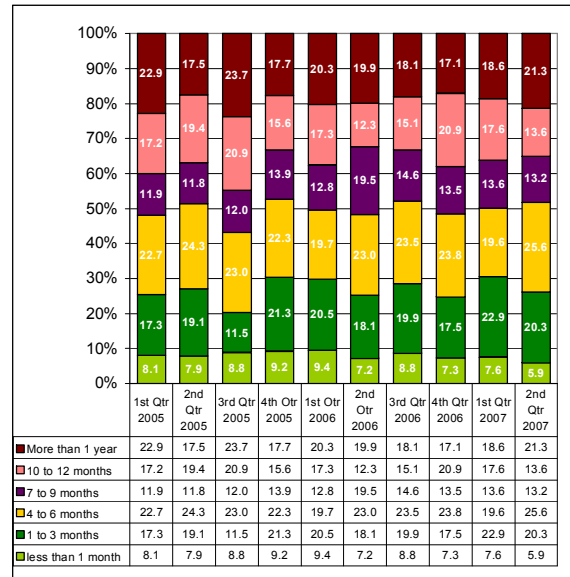
- In general, 60 to 70 percent of the U.S. West visitors decided to come to Hawai'i four months or more before arriving (see Figure 21).

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



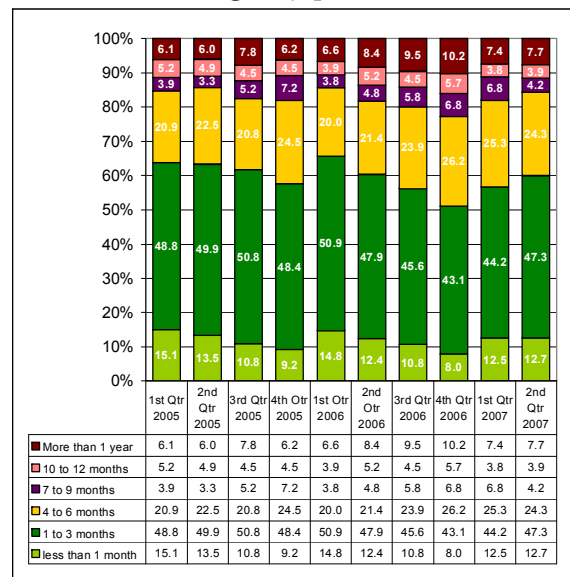
- Compared to previous quarters, the proportion of U.S. East visitors who decided to come to Hawai'i no later than one month before arriving, in the second quarter of 2007 (5.9%), was the lowest ever (see Figure 22).

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



- In the second quarter of 2007, 47.3 percent of Japan visitors decided to come to Hawai'i only one to three months before arrival and another 12.7 percent decided in less than one month. (see Figure 23).

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

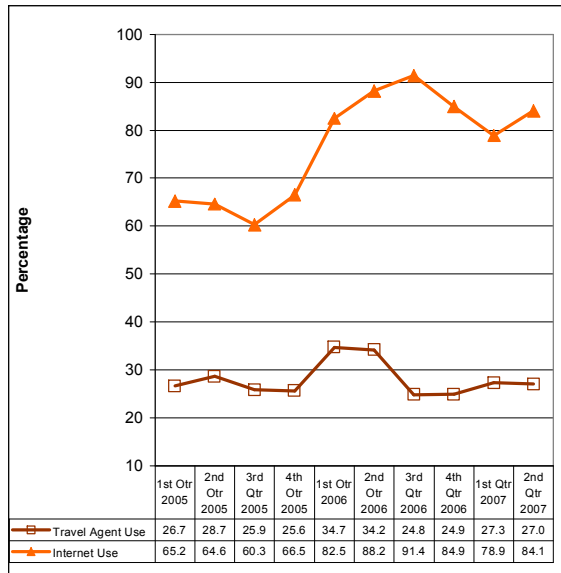


## Internet and Travel Agent Use

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.

- For the U.S. visitor, Internet use has been in the range of 80 to 90 percent of visitors. In the second quarter of 2007, Internet use was at 84.1 percent of all U.S. visitors to Hawai'i.
- Travel agent use, meanwhile, remains at between one-quarter to one-third of visitors. (see Figure 24).

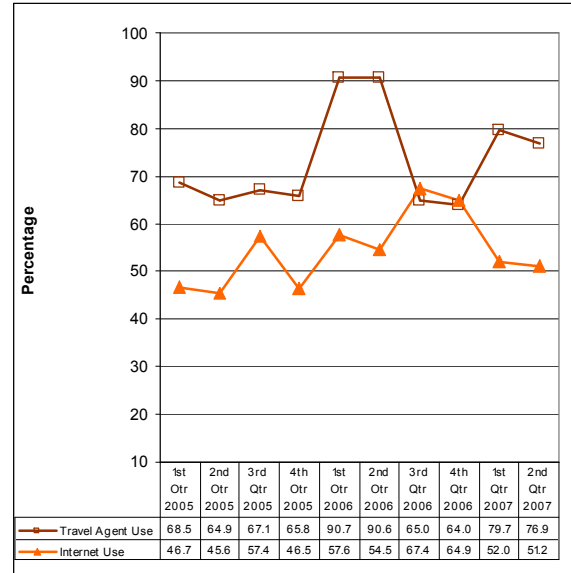
**Figure 24: Internet and Travel Agent Use – U.S. [Percentage of U.S. visitors]**



- Japanese travel agent users are more prevalent than Internet users. In the second quarter of 2007, travel agent users made up 76.9 percent of all Japanese visitors. In 2006, travel agent users reached 91 percent of the total Japanese visitors.
- Internet usage remains around 50 percent with a high 67.4 percent of Japanese visitors in the third quarter of 2006.

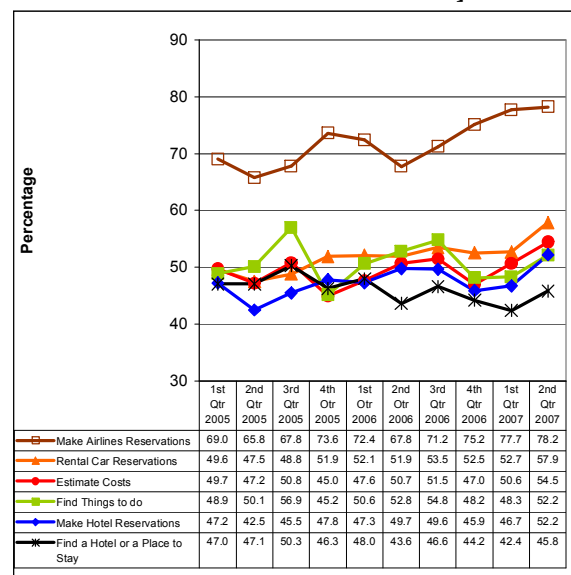
Internet use for the second quarter of this year was 51.2 percent.

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



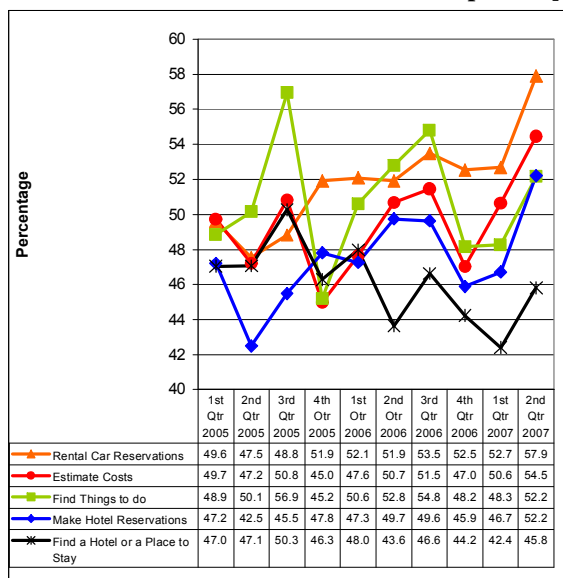
- 78.2 percent of U.S. Internet users made airline reservations, making it the dominant Internet activity. This level has increased dramatically from 67.8 percent only one year ago (see Figure 26).

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



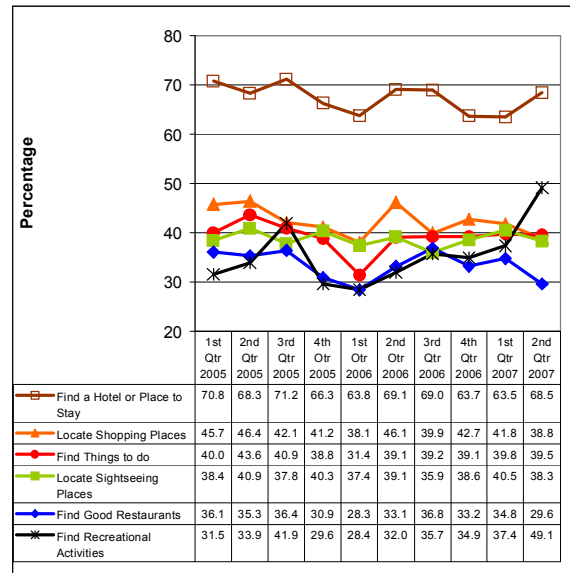
- The percentage of U.S. visitors in the second quarter of 2007 who made rental car reservations (57.9%), estimated costs (54.5%) and made hotel reservations (52.2%) through internet use was more frequent than the same quarters over the past two years (see Figure 27). Using the Internet to find an accommodation is still the least utilized (45.8%) in the second quarter of 2007.

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



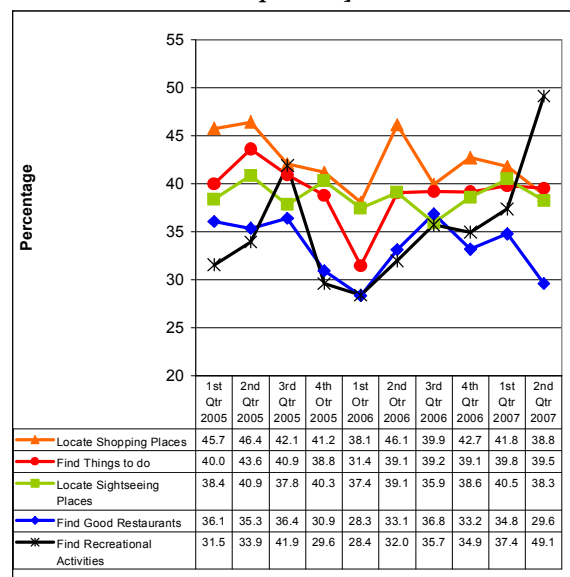
- In contrast to U.S. Internet users, Japanese users were mainly interested in finding an accommodation (68.5%) (see Figure 28). Other activities drew less than half of all Japanese Internet users.

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

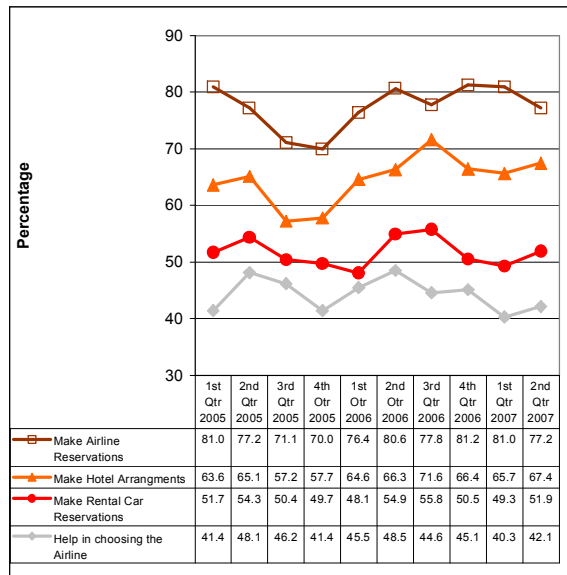


- Compared to previous quarters, Internet use among Japanese visitors, to find recreational activities (49.1%), was much higher in the second quarter of 2007 (see Figure 29).

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

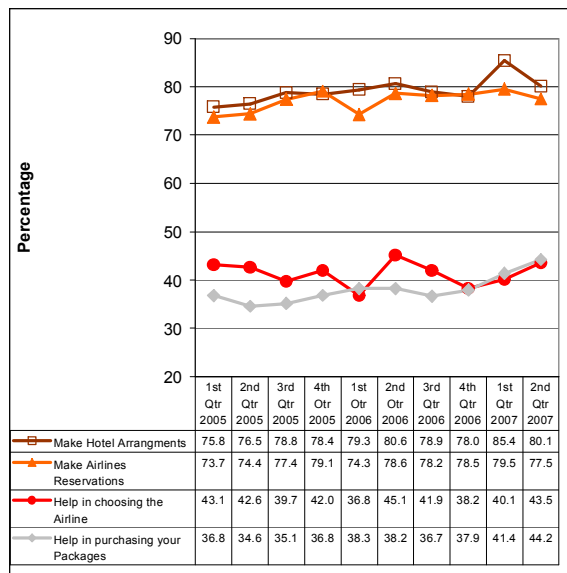


**Figure 30: Travel Agent Use – U.S. [Percentage of U.S. visitors who used a Travel Agent]**



- Most U.S. visitors who used a travel agent (77.2%) made airline reservations. This proportion has remained stable over the past year and a half (Figure 30).

**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 (80.1%) or airlines reservations (77.5%) (Figure 31).

## 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  
January – March 2007**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	2,850	882	30.9%	+/- 3.3
U.S.	4,500	1,309	29.1%	+/- 2.7
Canada	3,000	982	32.7%	+/- 3.1
Europe				

**Table 2: Sample Size  
April – June 2007**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	2,850	854	30.0%	+/- 3.3
U.S.	4,500	1,038	23.1%	+/- 2.7
Canada	3,000	741	24.7%	+/- 3.1
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.