

**2007**

**Visitor Satisfaction  
Monitoring Report**

**Third Quarter  
(July - September)**



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 third quarter (July – September) of 2007, there were a total of 1,976,238 visitors to the State, fairly consistent (+0%) to the same quarter last year. Visitor arrivals from U.S. West with 879,782 (-2.3%) and U.S. East with 470,952 (-1.5%) declined. However, visitor arrivals increased from Canada with 42,219 (+4.8%), Japan with 375,891 (+2.1%) and Other with 207,394 (+9.4%). The average length of stay for all visitors to the State was slightly shorter at 8.97 days compared to 9.04 days in the third quarter of 2006.

The first nine 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 5,592,324 visitors, a decrease of 1 percent over the same period last year. U.S. West showed slight improvement with 2,420,587 visitors (+0.7%) in the first three quarters of 2007 and Canada with 197,325 visitors (+1.9%). However, U.S. East with 1,465,603 visitors (-2.7%) and Japan with 993,887 visitors (-2.6%) declined in visitor arrivals. The average length of stay of all visitors declined (-0.9%) to 9.1 days. The proportion of repeat visitors to the State continued to inch up from 63.6 percent in the first nine months of 2006 to 64.1 percent in 2007.

# RESULTS

## Visitor Satisfaction Ratings

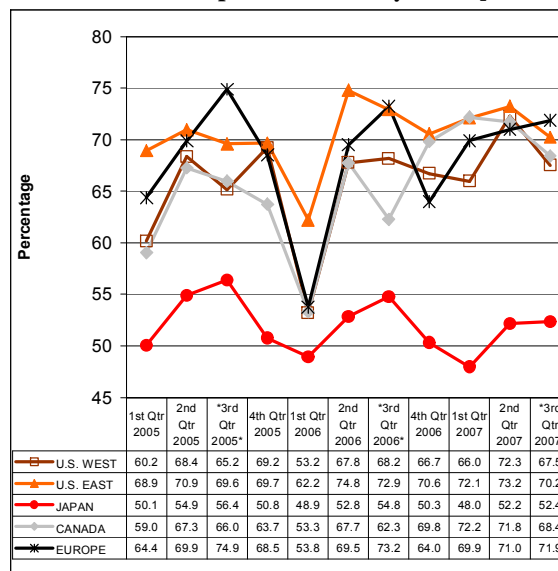
Visitor satisfaction is an important indicator of industry performance. This measure provides vital feedback on how well services are delivered and how well the industry meets expectations. High satisfaction is also a leading-indicator of customer retention and loyalty. Satisfying visitors' needs and 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 the majority of 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.

- Third quarter 2007 U.S. West, U.S. East and European visitor ratings were fairly consistent to the same time last year.
- Slightly more than half (52.4%) of Japanese visitors in the third quarter of 2007 rated their trip to Hawai'i as excellent. Even though this rating is less than the U.S. rating (66.6%), this is not a new phenomenon as the Japanese rating has remained fairly consistent (2006 average rating was 51.7 percent), with no significant change, over the past four years.
- Ratings from Canadian visitors were higher in the third quarter of 2007 (68.4%) than in the third quarter of either 2005 (66%) or 2006 (62.3%).

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



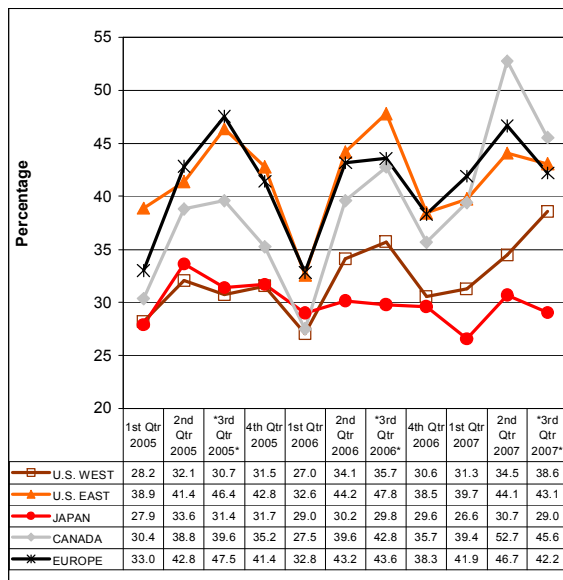
## Exceeded Expectations

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. Overall, Hawai'i's ability to exceed expectations continues to remain quite strong through the third quarter of 2007 (see Figure 2).

- U.S. West visitors reported higher marks for the third quarter of 2007 (38.6%) over the third quarter of 2005 (30.7%) and 2006 (35.7%). Ratings from U.S. West visitors demonstrated an upward trend since the fourth quarter of 2006 (30.6%).
- U.S. East visitor third quarter ratings for 2007 were lower (-4.7 percentage points) than third quarter ratings for 2006 (47.8%).

- In the third quarter of 2007, 29 percent of Japanese visitors felt that Hawai'i exceeded expectations. Ratings were fairly consistent to the third quarter of 2006 (29.8%).
- 2007 third quarter ratings from Canadian visitors (45.6%) were similar to the same period of 2006 (42.8%), despite a 7.1 percentage point decrease from the previous quarter (52.7%).
- European ratings in the third quarter of 2007 (42.2%) were similar to 2006 (43.6%) and slightly lower than 2005 (47.5%).

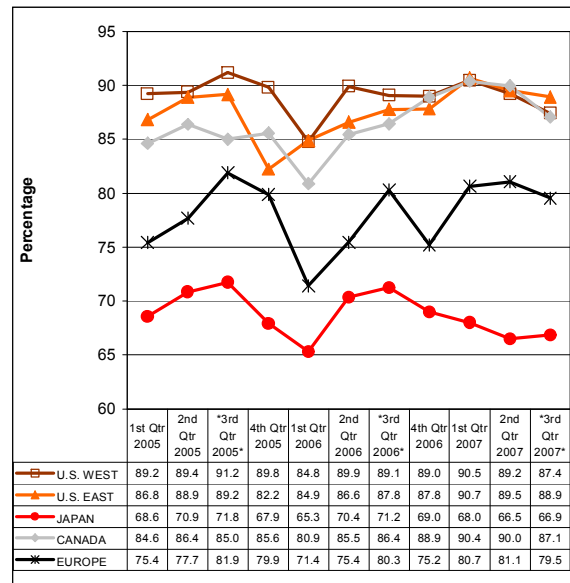
**Figure 2: Trip Exceeds Expectations**  
[Percentage of visitors who said this trip "Exceeded Expectation" by MMA]



### Very Likely to Recommend Hawai'i

When visitors are highly satisfied with their trip, they will be 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]



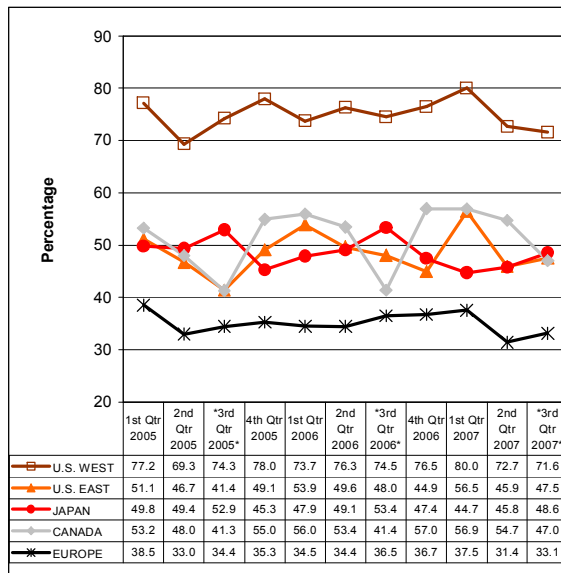
- In the third quarter of 2007, most of the North American visitors - U.S. West (87.4%), U.S. East (88.9%), and Canada (87.1%), continued to recommend Hawai'i to friends or relatives (see Figure 3).
- Compared to the third quarter of 2006 (71.2%), the proportion of Japanese visitors that were very likely to recommend Hawai'i in the third quarter of 2007 decreased 4.3 percentage points to 66.9 percent.

- The proportion of Canadian visitors who were willing to recommend Hawai'i was fairly similar between the third quarter of 2007 (87.1%) and 2006 (86.4%).

### 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]

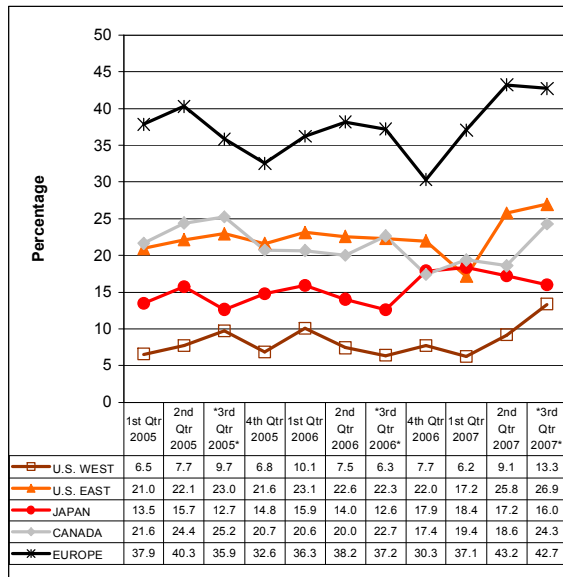


- The likeliness of U.S. West visitors revisiting Hawai'i in the next five years was lower in the third quarter of 2007 (71.6%) than the same period in 2006 (74.5%). In addition, the percentage of U.S. West visitors has declined 8.4 percentage points since the first quarter of 2007 (80%).
- Third quarter ratings from U.S. East visitors (47.5%) were comparable to third quarter ratings of 2006 (48%).
- Fewer Japanese visitors, were very likely to return to Hawai'i in the next five years in the third quarter of 2007 (48.6%) than the same period of 2006 (53.4%).
- The likelihood of Canadian visitors revisiting Hawai'i exhibits a seasonal trend where the third quarter of each year yields lower ratings than the rest of the year. However, 2007 third quarter ratings were 5.6 percentage points higher than the same time last year (41.4%).
- Only about a third (33.1%) of European visitors were very likely to return in the next five years due to varied factors such as distance. Ratings among Europeans decreased 3.4 percentage points from the same quarter of 2006 (36.5%).

### 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. In the third quarter of 2007, more U.S. West, U.S. East, Japan and Europe were unlikely to revisit Hawai'i in the next five years compared to the same period in 2005 and 2006 (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]



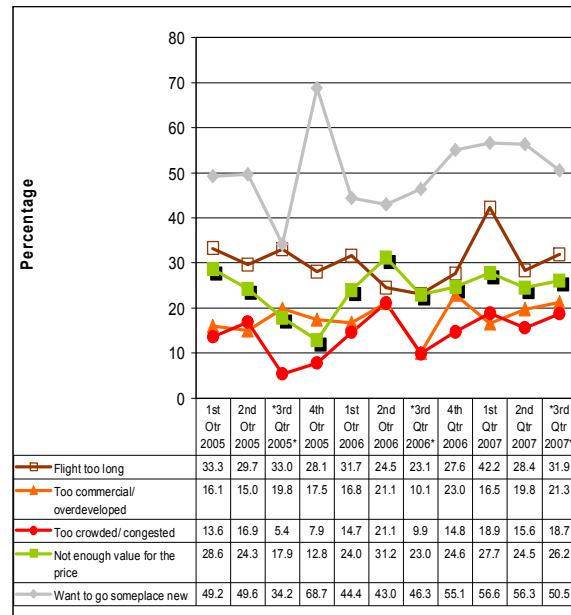
- Since the beginning of 2007, the share of visitors', who were not likely to return in the next five years, exhibit a rising trend for U.S. West, U.S. East and Europe. A number of U.S. East and European visitors commented that taking a vacation to Hawai'i is costly.
- The proportion of Japanese visitors who were not likely to revisit Hawai'i (16 percent in the 3<sup>rd</sup> Quarter 2007) was lower in the third 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 percentage of each reason for not revisiting Hawai'i is the proportion of those who are "Not too likely" or "Not at all likely" to visit Hawai'i in the next five years.

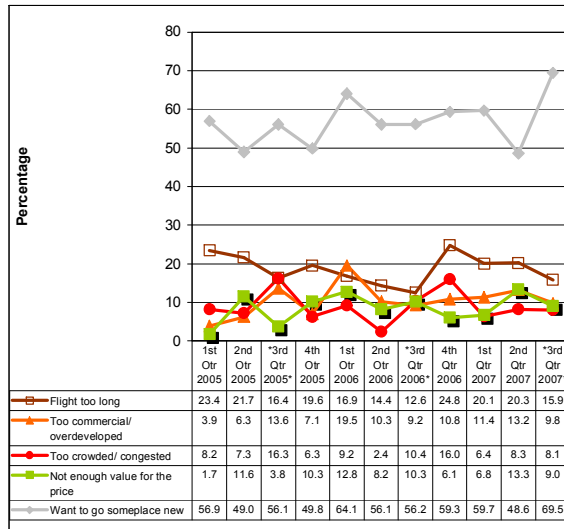
- Over the past year, there had been a constant increase of U.S. visitors who were not likely to return and instead wanted to visit someplace new. For the past four quarters, this amount has remained over 50 percent of those who were not likely to revisit (see Figure 6).
- In the third quarter of 2007, the proportion of U.S. visitors that felt that the flight was too long (31.9%), Hawai'i was too commercial/ overdeveloped (21.3%) and too crowded/ congested (18.7%) was significantly higher than the third quarter of 2006.

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



- The percentage of Japanese visitors in the third quarter of 2007 (69.5%) that desired to visit someplace else has significantly increased 13.3 percentage points from the same period in 2006 (56.2%) (Figure 7).

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



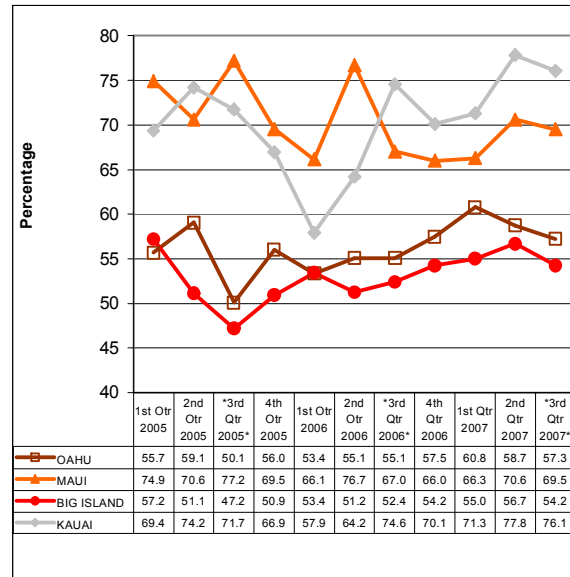
### Individual Island Experience

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, visitors to Maui and Kaua'i were more likely to say they had an excellent experience than visitors to O'ahu or the Big Island of Hawai'i (see Figure 8).
- In the third quarter of 2007, satisfaction ratings on O'ahu (57.3%), Big Island (54.2%) and Kaua'i (76.1%) was slightly higher than the third quarter of either 2005 or 2006, though not significantly.
- The proportion of U.S. visitors that found Maui excellent (69.5%) improved 2.5 percentage points from the third quarter

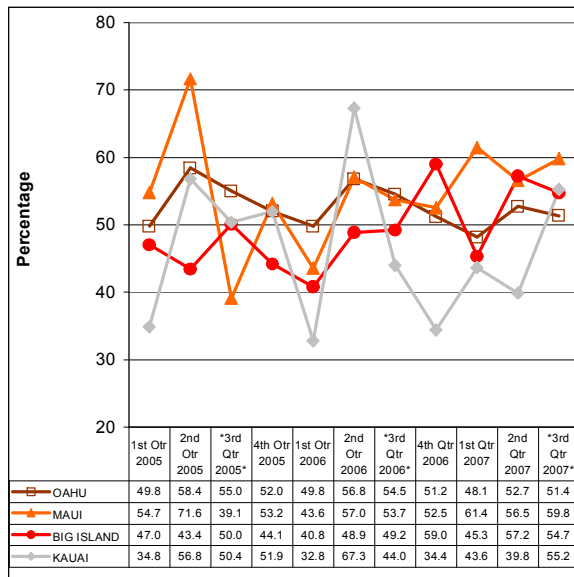
of 2006 (67%), though again not significantly.

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

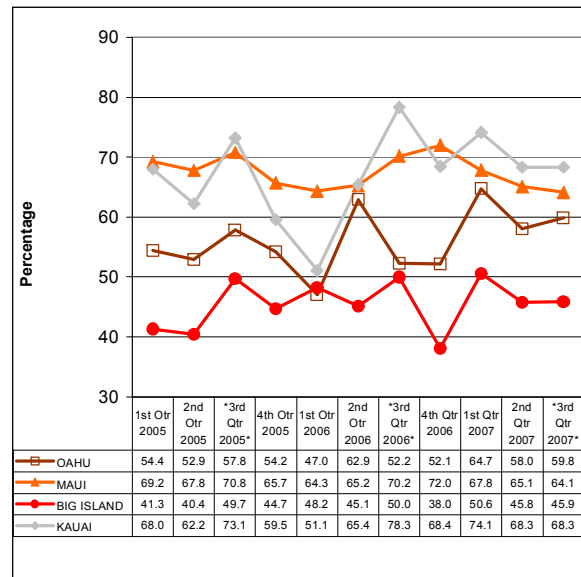


- Japanese visitor satisfaction levels for the island of O'ahu in the third quarter of 2007 (51.4%) was slightly lower than the third quarter of either 2005 (55%) or 2006 (54.5%) (see Figure 9).
- Japanese visitors had notably higher satisfaction ratings for the islands of Maui (59.8%) and Kaua'i (55.2%) compared to the same period of 2005 or 2006.

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



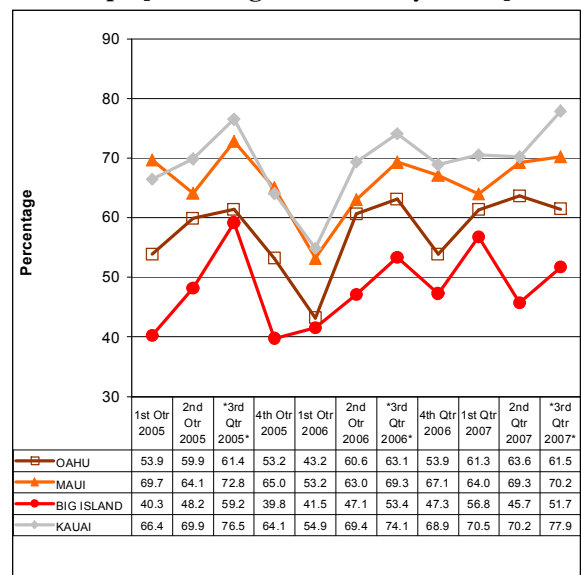
**Figure 10: Island Experience Rated as Excellent – Canada**  
[Percentage of visitors by Island]



- More Canadians found O’ahu (59.8%) excellent in the third quarter of 2007 than in the third quarter of 2006 (52.2%) (see Figure 10).
- The proportion of Canadian visitors that rated Maui (64.1%), Big Island (45.9%) and Kaua’i (68.3%) excellent was lower in 2007 compared to the third quarter of either 2005 or 2006.
- Maui satisfaction ratings by Canadians showed a decline since the fourth quarter of 2006.

- European visitors reported slightly better ratings for Kaua’i (77.9%) than the same quarter of 2005 (76.5%) and 2006 (74.1%) (see Figure 11). Ratings for Kaua’i reached record high in the third quarter of 2007 since the beginning of 2005.

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



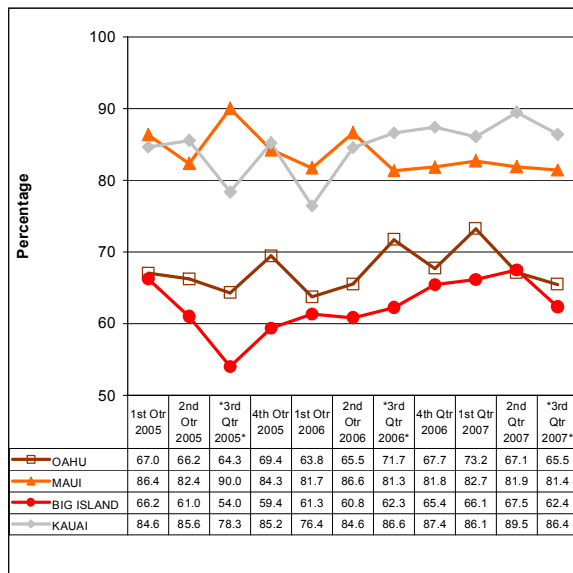


## Individual Island Recommendation

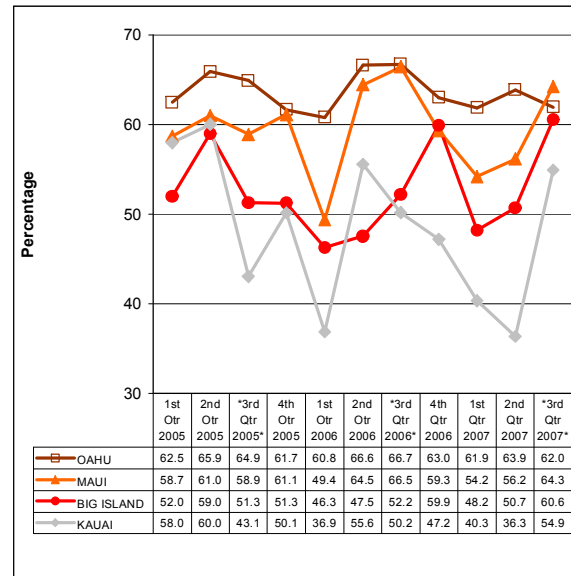
Again, when visitors are highly satisfied with the destination they visited, they will be more likely to recommend the place to friends and family.

- Similar to their rating of experiences, U.S. visitors had a clear opinion that Maui and Kaua'i were more likely to be recommended over O'ahu and Hawai'i Island (see Figure 12).
- The proportion of U.S. visitors that were very likely to recommend Maui (81.4%), Big Island (62.4%) and Kaua'i (86.4%) was similar to the same period in 2006.
- For the third quarter of this year, the proportion of U.S. visitors who were very likely to recommend the island of O'ahu decreased (-6.2 percentage points) from the third quarter of 2006 (71.7%).

**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]**

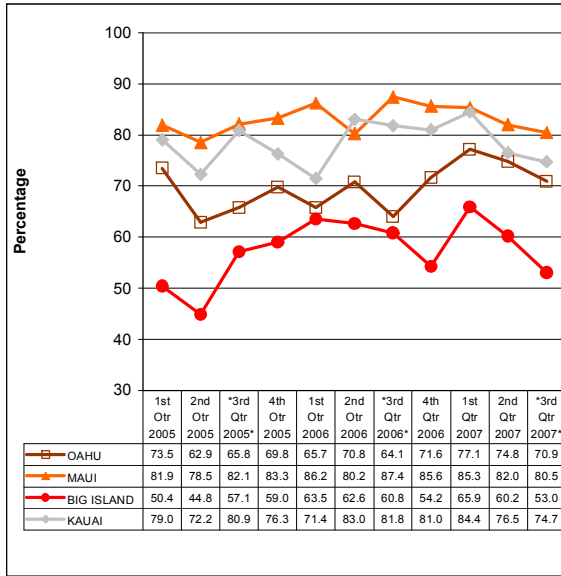


**Figure 13: Very Likely to Recommend Island – Japan [Percentage of visitors who are “Very Likely” to recommend Island as a vacation place by Island]**



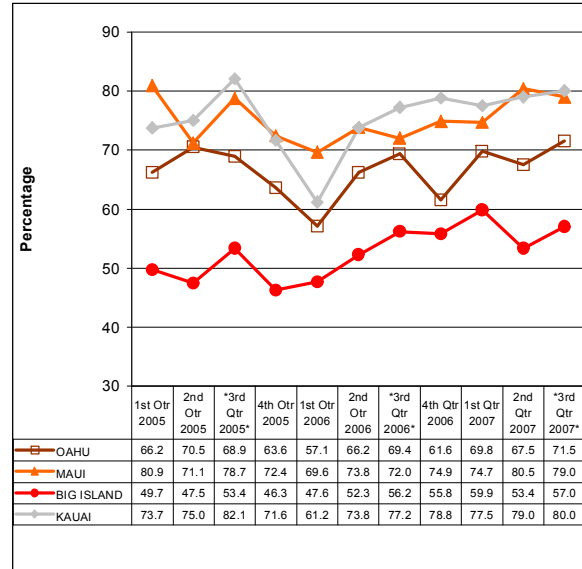
- For the third quarter of 2007, Big Island (60.6%) and Kaua'i (54.9%) received higher ratings by Japanese visitors compared to the third quarter of 2005 and 2006 (see Figure 13).

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



- Canadian visitor 2007 third quarter ratings for Maui (80.5%), Big Island (53%) and Kaua'i (74.7%) were lower compared to 2005 and 2006 third quarter ratings. At the same time, the rating for O'ahu (70.9%) was higher.
- Over the past year, the proportion of Canadian visitors to Hawai'i Island who were very likely to recommend the island continued to decline.

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



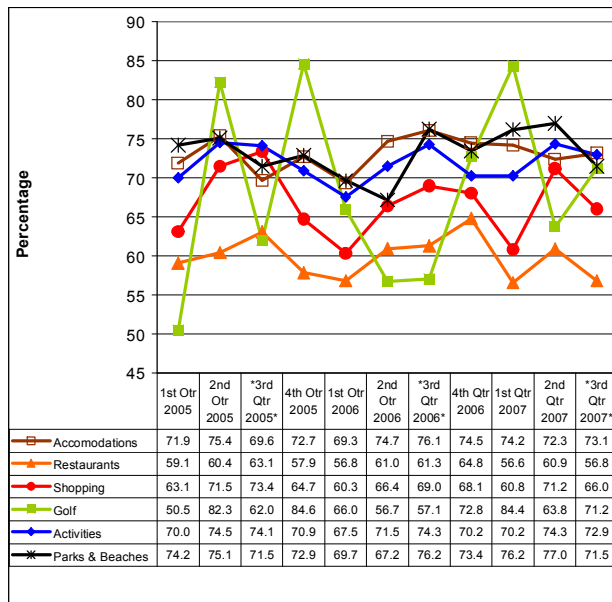
- Four out of five Europeans (80%) were very likely to recommend Kaua'i to their family and friends in the third quarter of 2007 (see Figure 15). Europeans were more likely to recommend Kaua'i or Maui over the Big Island.

## Attributes of Each Island

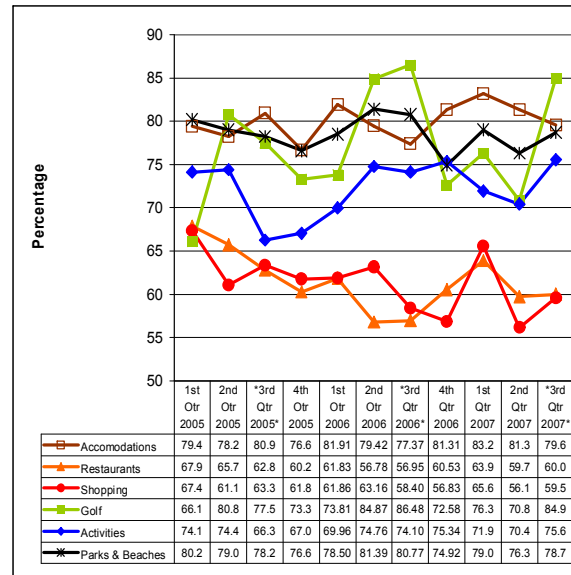
Analysis of the visitors' satisfaction with the specific attributes, activities and products of each island may help us to identify the underlying reasons for changes in individual island experiences.

- U.S. visitors on O'ahu were similarly satisfied with the island's accommodations (73.1%), golf (71.2%), activities (72.9%) and parks and beaches (71.5%) in quarter three of 2007 (Figure 16).
- The number of U.S. visitors who were very satisfied with O'ahu's golf was significantly higher in the third quarter of 2007 (71.2%) compared to either 2005 (62%) or 2006 (57.1%) ratings.
- In the third quarter of 2007, U.S. visitors were less satisfied with O'ahu's restaurants (56.8%) than the third quarter of 2006 (61.3%).

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

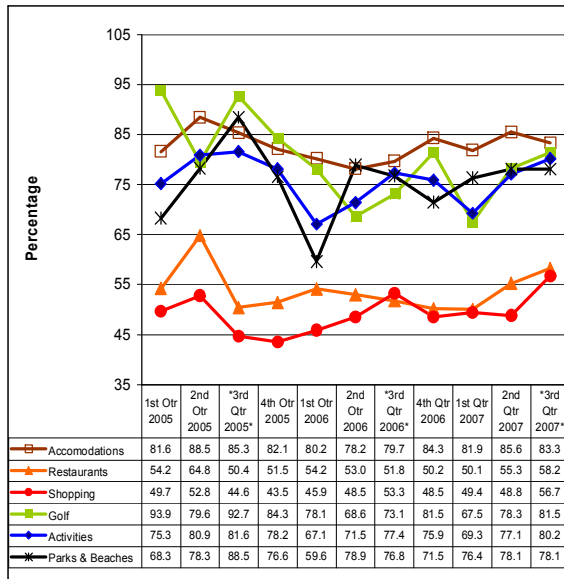


**Figure 17: Detailed Satisfaction Ratings for U.S. Visitors to Maui**  
[Percentage of U.S. visitors to Maui]



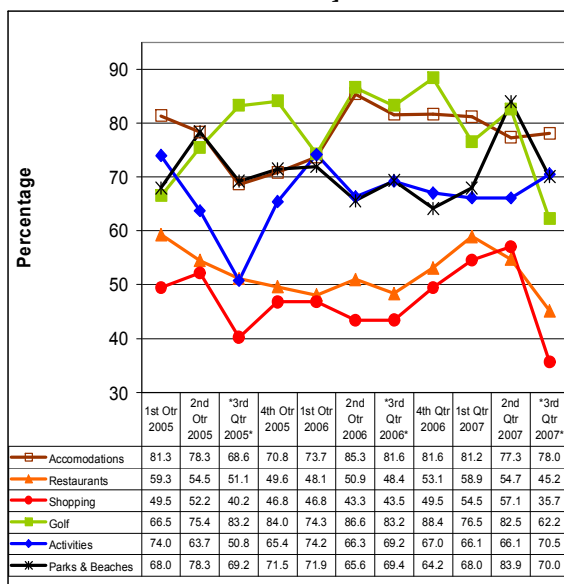
- Among attributes, Maui's golf (84.9%) was ranked the highest by U.S. visitors, followed by the island's accommodations (79.6%), parks and beaches (78.7%) and activities (75.6%) for the third quarter of 2007 (Figure 17).
- At the same time, U.S. visitors were least satisfied with Maui's shopping (59.5%) and restaurants (60%).
- The proportion of U.S. visitors who enjoyed Maui's activities improved 9.3 percentage points from the third quarter of 2005 (66.3%).

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



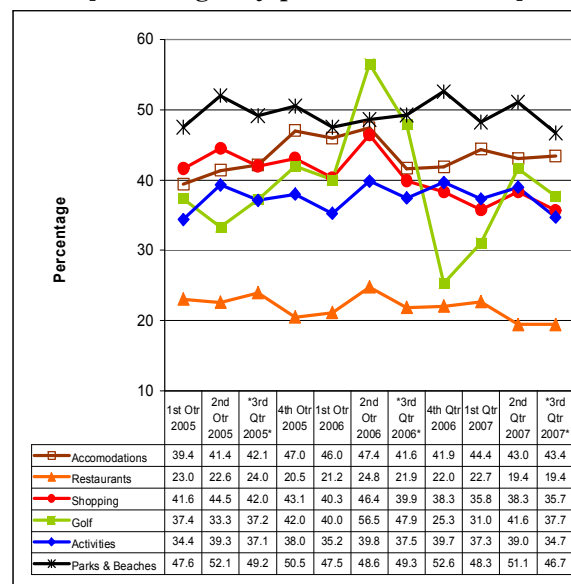
- U.S. Visitors to Kaua'i were more satisfied with the accommodations (83.3%), golf (81.5%), activities (80.2%), and parks and beaches (78.1%); while shopping (56.7%) and restaurants (58.2%) received lower ratings (Figure 18).

**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 accommodations (78%) in the third quarter of 2007 (Figure 19).
- 2007 third quarter ratings from U.S. visitors regarding golf (62.2%) and shopping (35.7%) on Hawai'i Island has significantly dropped.

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



- Japanese visitors continued to be most satisfied with O'ahu's parks and beaches (46.7%) and to a lesser extent it's accommodations (43.4%) (see Figure 20).
- Japanese visitor ratings regarding O'ahu's shopping was somewhat lower in the third quarter of 2007 (35.7%) than the third quarter of the previous year (39.9%).
- Japanese visitors' satisfaction with O'ahu's golf courses was significantly lower (down 10.2 percentage points), in the third quarter of 2007 (37.7%) compared to the same quarter of 2006.

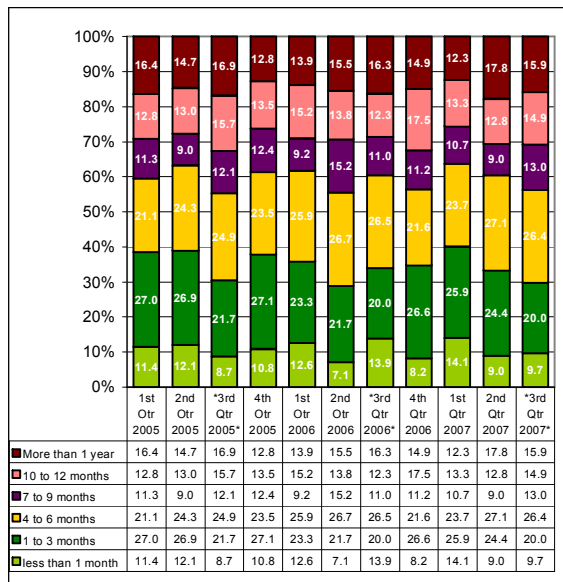
- Restaurants on O'ahu continued to be the least satisfying attribute to Japanese visitors to the island.

### 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.

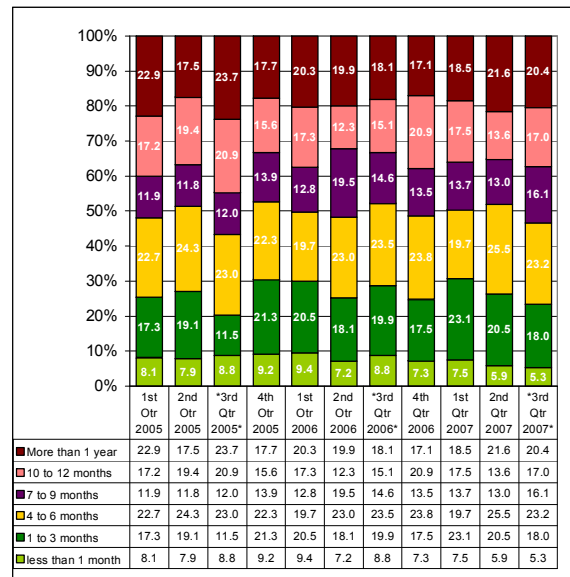
- In general, 60 to 70 percent of the U.S. West visitors decided to come to Hawai'i four months or more before arriving (see Figure 21).

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



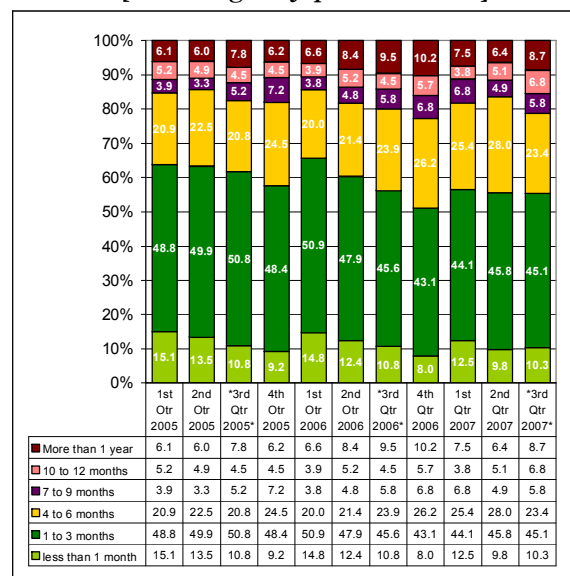
- Compared to previous quarters since 2005, the proportion of U.S. East visitors who decided to come to Hawai'i just one month before arriving, was the smallest (5.3%), in the third quarter of 2007 (see Figure 22).

**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 third quarter of 2007, 55.4 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 for the first three quarters of 2007 (see Figure 23).

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

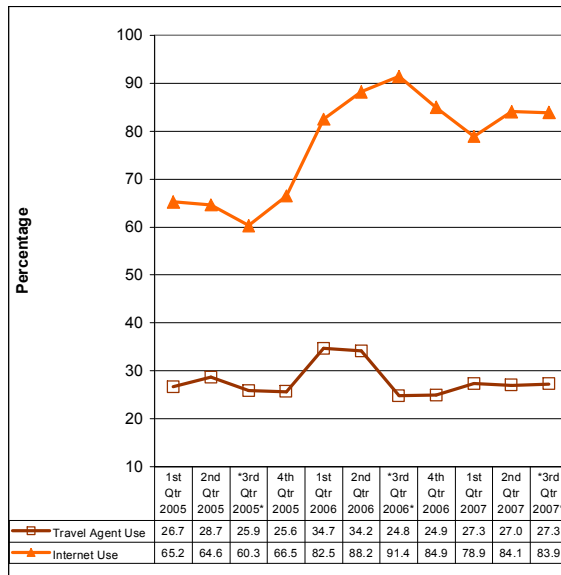


## Internet and Travel Agent Use

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. Compared to the third quarter of 2006, Internet use decreased 7.5 percentage points to 83.9 percent of all U.S. visitors to Hawai'i.
- Travel agent use, meanwhile, remains at between one-quarter to one-third of visitors (27.3% in the 3<sup>rd</sup> Quarter of 2007) (see Figure 24).

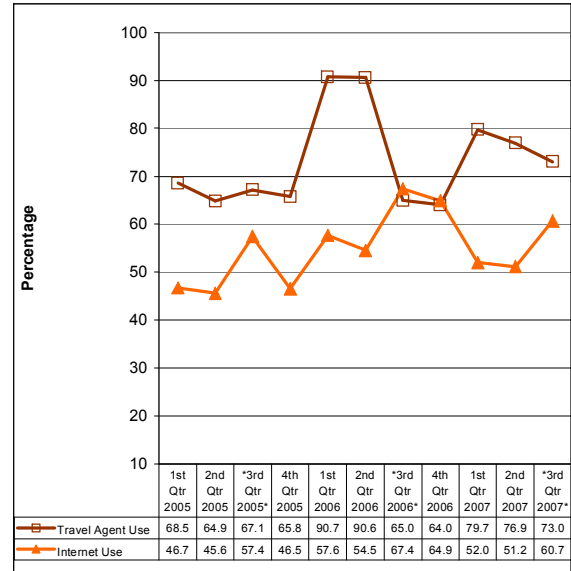
Figure 24: Internet and Travel Agent Use – U.S. [Percentage of U.S. visitors]



- Japanese travel agent users are more prevalent than Internet users. In the third quarter of 2007, travel agent users made up 73 percent of all Japanese visitors. The proportion of travel agent users improved from 65 percent of the total Japanese visitors in the third quarter of 2006.

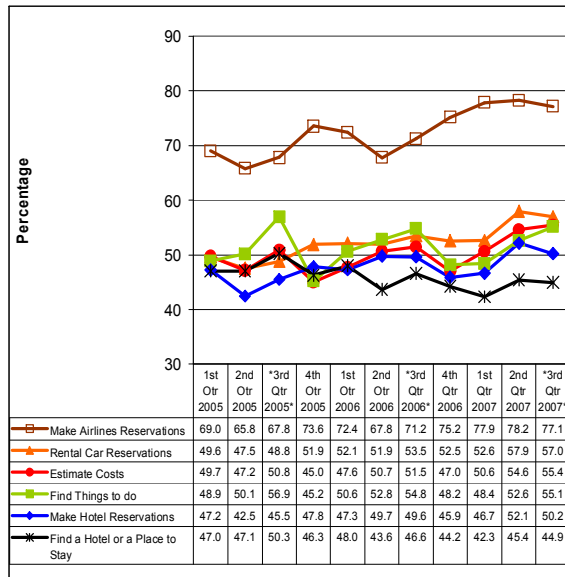
- Internet usage remains around 50 percent and reached a high 67.4 percent of Japanese visitors in the third quarter of 2006. Internet use for the third quarter of this year is lower at 60.7 percent compared to the same quarter of 2006.

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



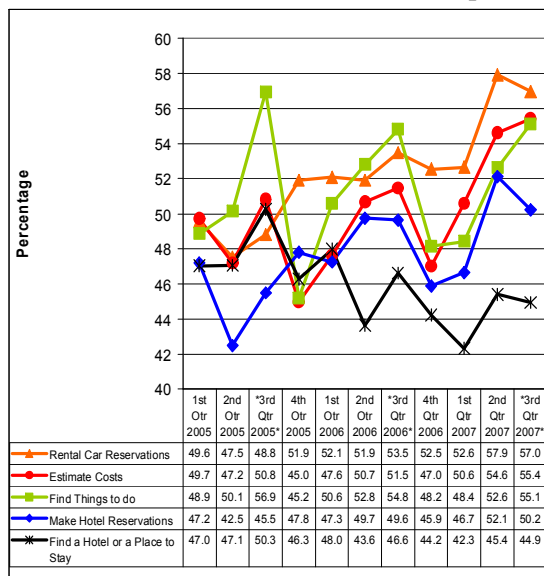
- 77.1 percent of U.S. Internet users (or 46.8% of all U.S. visitors) made airline reservations, making it the dominant Internet activity. This level was higher than the 71.2 percent (or 65.1% of all U.S. visitors) in the third quarter of 2006 and remained consistent since the first quarter of 2007 (see Figure 26).

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



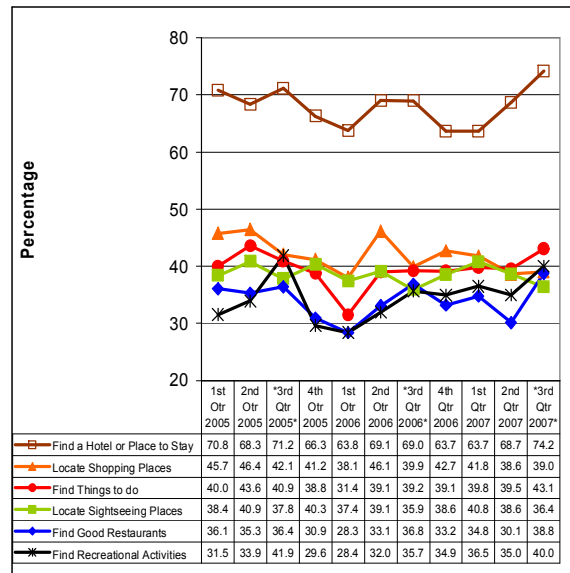
- The percentages of U.S. Internet users in the third quarter of 2007 who made rental car reservations (57% or 47.8% of all U.S. visitors) or estimated costs (55.4% or 46.5% of all U.S. visitors) through Internet use were higher than the same quarter of the past year (see Figure 27). Using the Internet to find an accommodation is still the least utilized (44.9% or 37.7% of all U.S. visitors) in the third quarter of 2007.

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



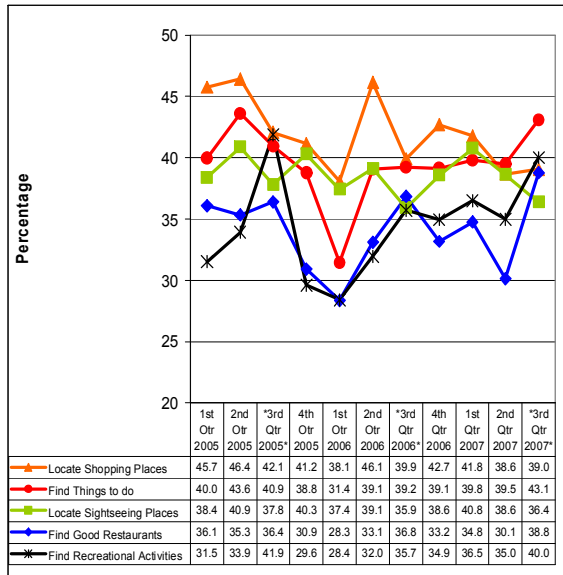
- For the third quarter of 2007, Japanese users were mainly interested in finding an accommodation (74.2% or 45% of all Japanese visitors) (see Figure 28). In addition, the proportion displayed an increasing trend from the beginning of 2007. Other activities continued to draw less than half of all Japanese Internet users.

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



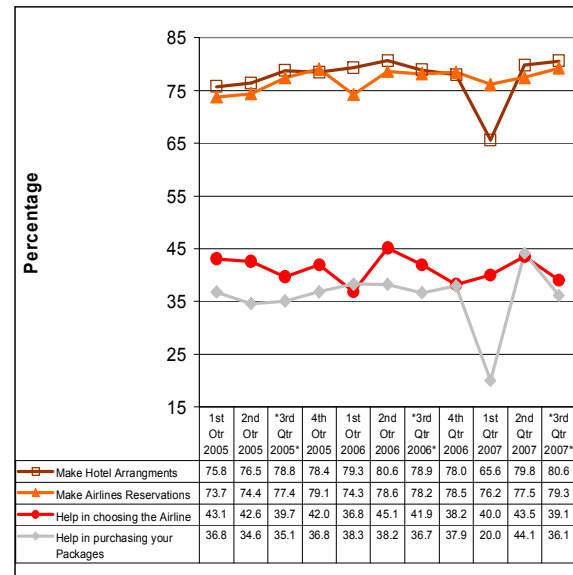
- Compared to previous quarters, Internet use among Japanese visitors, to find recreational activities (40% or 24.3% of all Japanese visitors), was higher in the third quarter of 2007 (see Figure 29).

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



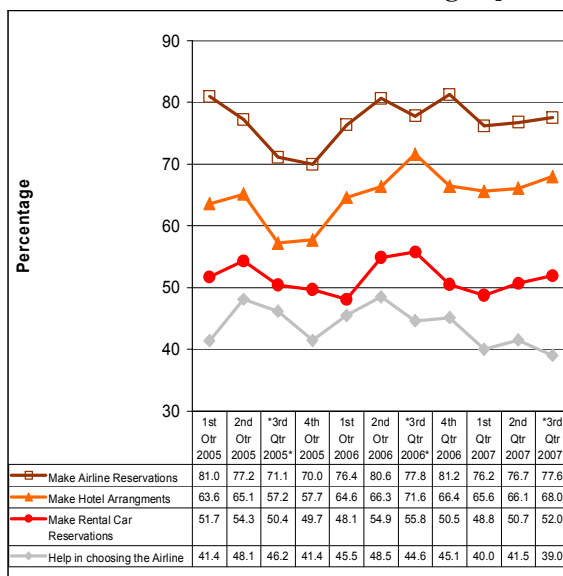
- Most U.S. visitors who used a travel agent made airline reservations, (77.6% or 21.2% of all U.S. visitors). This proportion has remained consistent since the first quarter of 2006 (Figure 30).

**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 (80.6% or 58.8% of all Japanese visitors) or airlines reservations (79.3% or 51.6% of all Japanese visitors) (Figure 31).

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





## 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  
July – September 2007**

Area	Mail-out	Recv'd	Return Rate	Level of accuracy at 95% CI
Japan	3,200	847	26.5%	+/- 3.4
U.S.	4,800	1,202	25.0%	+/- 2.8
Canada Europe	2,958	841	28.4%	+/- 3.4

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.