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## **Visitor Satisfaction and Activity Survey Results Show Promise for Future Visitation Despite Economic Headwinds**

**HONOLULU** – The Department of Business, Economic Development and Tourism (DBEDT) released the results of its Q4 2022 Visitor Satisfaction and Activity Survey (VSAT) which surveyed visitors from the U.S. West, U.S. East, Canada, Japan, Oceania, Korea, and China who visited Hawai'i from October to December 2022. The survey found that a majority of visitors from all markets surveyed indicated a high likelihood to return to the Hawaiian Islands in the next five years. High overall satisfaction with visitors' most recent stay in Hawai'i appeared to overshadow effects of inflation.

More than 60 percent of visitors from all markets indicated they were “very likely” to return to Hawai'i in the next five years. Hawai'i's largest major market area, the U.S. West, saw 80.6 percent of visitors indicating an interest in returning, followed by 77.8 percent of those from Korea, 67.1 percent from Canada, 64.7 percent from the U.S. East and 61.6 percent from Oceania. Those from the U.S. West and U.S. East who traveled in smaller parties were more likely to return, as were more affluent visitors from the U.S. West. Repeat visitors from the U.S. West, U.S. East, Oceania and Canada expressed a greater likelihood of returning to the state than first-time visitors. The biggest barrier to returning to Hawai'i in the next five years for all markets surveyed continued to be the high cost of a vacation in the state.

“Visitors' expressed interest in returning to Hawai'i speaks to the quality experience provided by our industry and community partners, and the individuals who engage with travelers throughout the state,” said John De Fries, HTA's president and CEO. “We continue to educate visitors about how to travel mindfully including ways they can support local businesses, preserve our islands' natural and cultural resources, and make meaningful connections.”

Visitor satisfaction is a Key Performance Indicator (KPI) of the Hawai'i Tourism Authority's (HTA) Strategic Plan, along with resident satisfaction, average daily visitor spending and total visitor spending. Overall satisfaction levels among visitors from all markets surveyed remained consistently high throughout 2022, rivaling pre-pandemic levels. Visitors rating their most recent trip to Hawai'i as “excellent” included U.S. West (87.5 percent), U.S. East (88.7 percent), Canada (79.5 percent), Japan (79.5 percent), Oceania (75.2 percent) and Korea (85.5 percent).

Prior to or during their trip, the majority of visitors surveyed recalled seeing or hearing information about caring for and respecting Hawai'i's culture, people and environment. More than half of visitors from the U.S. West, U.S. East and Korea recalled seeing or hearing information about safe and responsible travel; ocean and hiking safety; and supporting local or shopping local.

Hawai'i exceeded expectations among many visitors, with 42.6 percent from U.S. West, 51.3 percent from U.S. East, 43.7 percent from Canada, 32.5 percent from Oceania, and 68.0 percent from Korea indicating their latest trip “exceeded expectations.” Younger respondents between 18

and 34 years old from the U.S. West, U.S. East, Japan, and Canada were more likely to respond that their trip exceeded expectations compared to visitors from these markets in other age groups.

A strong majority of visitors in the fourth quarter from all markets surveyed were “very likely” to recommend the Hawaiian Islands as a vacation destination to their friends and family. Visitors from North American markets were the most likely to recommend Hawai‘i, led by those from the U.S. East (89.1 percent), U.S. West (88.9 percent) and Canada (87.2 percent). More than three in four visitors from Oceania (79.4 percent) and Korea (76.7 percent) shared the same likelihood to recommend the destination.

The VSAT is an ongoing survey of visitors from key visitor markets who recently completed a trip to Hawai‘i. The sampled visitor markets for Q4 2022 were: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Canada, Japan, Oceania, and Korea. Due to the relatively small number of visitors from Japan and China who completed the survey this quarter, data from those markets are not highlighted.

DBEDT’s Tourism Research Branch contracted Anthology Research to conduct the VSAT survey. Data were collected between October 1, 2022 and January 31, 2023 among visitors who traveled to Hawai‘i during the fourth quarter of 2022. A total of 4,845 visitors were surveyed during this period: 1,460 from the U.S. West (margin of error of +/- 2.56 percent); 1,577 from the U.S. East (margin of error of +/- 2.47 percent); 61 from Japan (margin of error of +/- 12.55 percent); 1,210 from Canada (margin of error of +/- 2.82 percent); 340 from Oceania (margin of error of +/- 5.31 percent); 162 from Korea (margin of error of +/- 7.70 percent); and 35 from China (margin of error of +/- 16.56 percent). Note all margins of error are presented at the 95 percent level of confidence.

The full results from the Q4 2022 VSAT are available online at:

<https://dbedt.hawaii.gov/visitor/vsat/>

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### **About the Hawai‘i Tourism Authority**

The Hawai‘i Tourism Authority is the state agency responsible for representing The Hawaiian Islands around the world, and for holistically managing tourism in a sustainable manner consistent with community desires, economic goals, cultural values, preservation of natural resources, and visitor industry needs. HTA works with the community and industry to Mālama Ku‘u Home – care for our beloved home. For more information about HTA, visit [www.hawaiitourismauthority.org](http://www.hawaiitourismauthority.org) or follow @HawaiiHTA on [Facebook](#), [Instagram](#), and [Twitter](#).

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