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## **Visitor Satisfaction and Activity Survey Includes Data from Six Major Market Areas for the First Time in Two Years**

**HONOLULU** – The Department of Business, Economic Development and Tourism (DBEDT) released the results of its Q3 2022 Visitor Satisfaction and Activity Survey (VSAT) that, for the first time since Q2 2020, include data from visitors from Japan, Korea and Oceania, in addition to U.S. West, U.S. East and Canada. Over the last two years, reporting had been limited due to insufficient visitation for this study.

Overall satisfaction among visitors from Hawai'i's primary North American markets has continued its upward trend since the beginning of the year to rival pre-pandemic levels. While arrivals from Japan, Korea and Oceania continue to increase, overall indications among visitors from these markets show a vast majority rate their latest trip to Hawai'i as "excellent." 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.

"An essential component of Hawai'i's sustained recovery is the high level of visitor satisfaction during the third quarter. These high ratings are attributable to the many kama'āina who work directly or indirectly in hospitality — from flight attendants and front desk agents, to stewards of our natural and cultural resources, to musicians and entertainers, and shop owners and restaurant servers," said John De Fries, HTA president and CEO.

Visitors rating their most recent trip to Hawai'i as "excellent" included U.S. West (88.7 percent), U.S. East (89.4 percent), Canada (87.8 percent), Japan (81.3 percent), Oceania (80.6 percent) and Korea (84.6 percent). Following a significant dip in satisfaction among visitors to Hawai'i in Q3 2020, the percentage of visitors to Hawai'i from U.S. markets who rated their trip "excellent" has continued to recover from the same period in the prior year (Q3 2021).

"The Hawai'i Tourism Authority's comprehensive approach to destination management and visitor education places the community's needs first and foremost," said De Fries. "We aim to foster the right balance in which Hawai'i's residents, natural resources and culture can thrive, and visitors can have a meaningful, enriching experience."

Prior to or during their trip, the majority of visitors surveyed from the U.S. West, U.S. East, Canada, Japan and Korea recalled seeing or hearing information about safe and responsible travel; caring for and respecting Hawai'i's culture, people and environment; and ocean and hiking safety. Oceania was the only market from which a minority of visitors reported receiving this information.

Hawai'i exceeded expectations among many visitors, with 45.5 percent from U.S. West, 56.4 percent from U.S. East, 49.1 percent from Canada, 42.6 percent from Japan, 37.1 percent from Oceania, and 56.6 percent from Korea indicating their latest trip "exceeded expectations." First-time visitors from the U.S. West, U.S. East, Japan, and Canada expressed higher degrees of satisfaction than repeat visitors from those markets.

The proportion of U.S. visitors who indicated they are likely to return to Hawai'i in the next five years held steady when compared to the same period in 2021, with travelers indicating a willingness to return at 82.6 percent among those from the U.S. West (78.4 percent in Q3 2021) and 60.0 percent among those from the U.S. East (62.7 percent in Q3 2021). More than three in five visitors indicated they are likely to return from Japan (73.5 percent), Canada (64.1 percent), Oceania (61.0 percent) and Korea (71.1 percent). Nearly seven-in-ten visitors from Canada (69.0 percent) expressed interest in returning in the near future. The high cost of a vacation in Hawai'i was the top reason cited for being unlikely to revisit in the next five years among visitors from all markets surveyed.

The majority of visitors in Q3 from all markets surveyed are "very likely" to recommend the Hawaiian Islands as a vacation destination to their friends and family. Visitors from North American markets are the most likely to recommend, led by Canadians at 89.8 percent, followed by visitors from the U.S. West (89.6 percent) and U.S. East (89.3 percent). More than three in four visitors from Japan (77.4 percent), Oceania (77.7 percent) and Korea (75.1 percent) share 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 Q3 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. Typically seven visitor markets are analyzed, but due to COVID-19-related travel restrictions, visitors from China were not surveyed as this market did not have sufficient visitation for this study.

DBEDT's Tourism Research Branch contracted Anthology Research to conduct the VSAT survey. Data were collected between August 1 and October 31, 2022, among visitors who traveled to Hawai'i during Q3 2022. A total of 5,145 visitors were surveyed during this period; 1,641 from the U.S. West, resulting in a margin of error of +/- 2.42 percent; 1,737 from the U.S. East, with a corresponding margin of error of +/- 2.35 percent; 113 from Japan, with a margin of error of 9.22 percent; 1,034 from Canada, with a margin of error of +/- 3.05 percent; 392 from Oceania, with a margin of error of +/- 4.95 percent; and 190 from Korea, with a margin of error of +/- 7.11 percent. Note all margins of error are presented at the 95 percent level of confidence.

The full results from the Q3 2022 VSAT are available online at:

<https://www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

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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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