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## Visitor Satisfaction Rebounded to Pre-Pandemic Levels in Q1 2022

**HONOLULU** – The Department of Business, Economic Development and Tourism (DBEDT) released the results of its Q1 2022 Visitor Satisfaction and Activity Survey (VSAT) that shows overall satisfaction among visitors from Hawai'i's key markets has rebounded to pre-pandemic levels. 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.

"The Hawai'i Tourism Authority's comprehensive approach to destination management places the community's needs first and foremost," said HTA President and CEO John 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 from each market 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.

The vast majority of visitors surveyed rated their most recent trip to Hawai'i as "excellent." This included visitors from the U.S. West (87.7 percent), U.S. East (89.2 percent) and Canada (86.6 percent). The ratings for the U.S. markets were up from the same reporting period last year (Q1 2021) and consistent with data collected from all three markets in Q1 2020, before pandemic-related restrictions were implemented. Visitors from Canada were not surveyed in Q1 2021 due to pandemic-related restrictions.

De Fries continued, "An essential component of Hawai'i's sustained recovery, the increase in visitor satisfaction during the first quarter is attributable to the numerous, hardworking individuals in our community – from the flight attendants and front desk agents, to the stewards of our natural and cultural resources, to the musicians and entertainers, and the shop owners and restaurant servers."

Hawai'i outperformed expectations among many visitors, with 47.9 percent of U.S. West, 57.1 percent of U.S. East and 46.2 percent of Canadian visitors indicating their latest trip "exceeded expectations." For all three markets, first-time visitors expressed higher degrees of satisfaction than repeat visitors and satisfaction was highest amongst younger travelers, those under 35 years of age.

Despite the slight increase in overall satisfaction in the first quarter of the year, the proportion of U.S. visitors who indicated they are likely to return to Hawai'i in the next five years declined, with travelers indicating a willingness to return at 82.2 percent among those from the U.S. West (down from 86.3 percent in Q1 2021) and 66.6 percent among those from the U.S. East (down from 73.2 percent in Q1 2021). The high cost of a vacation in Hawai'i was the top reason cited among visitors from both markets for being unlikely to revisit in the next five years. Nearly three quarters of visitors from Canada (74.7 percent) expressed interest in returning in the near future.

The likelihood of visitors from the U.S. West, U.S. East and Canada to recommend the Hawaiian Islands as a vacation destination to their friends and family has remained constant, with nine in ten visitors being “very likely” to advocate for a Hawai‘i trip.

The most popular activities on each island were the same for visitors from the U.S. West, U.S. East and Canada. Enjoying the beach was enjoyed by roughly 90 percent of visitors from each market in Q1 2022, followed by swimming in the ocean as well as enjoying scenic views and natural landmarks among more than two in three vacationers. Approximately half of the visitors from each market went hiking during their stay. At least a third of visitors from each market visited a park or botanical garden. Roughly 10 percent of visitors participated in agritourism activities. Approximately two percent of visitors participated in a volunteer opportunity with a community-based organization.

More than two thirds of visitors from these key markets participated in activities centered around history, culture and fine arts, including visiting historic and cultural sites, attending a lū‘au or hula performance, going to an art gallery or museum, or attending a festival or art/craft fair.

More than half of the visitors from each market dined at a family-style restaurant and nearly half enjoyed fine dining. Approximately 42 percent of visitors went to a food truck, roughly half went to a café or coffee shop, and more than one in three visited a farmer’s market. Nearly two in three visitors said they went to a local or artisan shop, and almost half purchased Hawai‘i-made products.

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 Q1 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.), and Canada. Typically eight visitor markets are analyzed, but due to COVID-19-related travel restrictions, visitors from Japan, Oceania, Korea, China, and Europe were not surveyed as these markets 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 January 1 and April 30, 2022, among visitors who traveled to Hawai‘i during Q1 2022. A total of 3,832 visitors were surveyed during this period; 1,588 from the U.S. West, resulting in a margin of error of +/- 2.46 percent; 1,705 from the U.S. East, with a corresponding margin of error of +/- 2.37 percent; and 539 from Canada, with a margin of error of +/- 4.22 percent. Note all margins of error are presented at the 95 percent level of confidence.

The full results from the Q1 2022 VSAT are available online at:

[www.hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/](http://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 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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