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Hawai'i Continues to Exceed Visitors' Expectations *Perceptions of Visitors from Europe Gathered for First Time Since 2020*

HONOLULU – Hawai'i continues to meet or exceed visitor expectations, according to the latest Visitor Satisfaction and Activity Survey (VSAT), which surveyed visitors from the U.S. West, U.S. East, Canada, Japan, Europe, Oceania (Australia and Aotearoa), Korea, and China who visited the state from January through March 2024. Following resident sentiment, measuring visitor sentiment is one of the Hawai'i Tourism Authority's (HTA) Key Performance Indicators, along with average daily visitor spending and total visitor spending.

The Department of Business, Economic Development and Tourism (DBEDT) recently released the VSAT results for the first quarter of 2024, which found that at least 90 percent of visitors from each target market rated Hawai'i as having met or exceeded their expectations. The majority said they are very likely to recommend Hawai'i to their friends and relatives.

Overall sentiment among visitors from all markets surveyed remained high, with 88.5 percent of visitors from the U.S. East and China rating their most recent trip to Hawai'i as "excellent," followed by 87.4 percent from the U.S. West, 86.6 percent from Canada, 86.0 percent from Europe, 83.8 percent from Japan, 80.6 percent from Korea, and 72.4 percent from Oceania. First-time visitors from Japan gave higher mean scores than repeat visitors from this market.

More than 90 percent of visitors from all markets rated Hawai'i as "excellent" or "above average" when it comes to being a safe and secure destination, including 100 percent of visitors from China, 98.5 percent from Canada, 97.6 percent from Korea and Europe respectively, 97.5 percent from the U.S. West, 93.9 percent from Japan, and 93.1 percent from Oceania.

"Time and time again, these positive outcomes demonstrate the value of Hawai'i as a safe and welcoming, world-class destination," said Mufi Hannemann, HTA board chair. "It's a direct result of every connection made in the travelers' journey, from the flight or cruise attendant welcoming guests onboard, to the front desk associate, to the server of the family-owned restaurant, to the tour operator whose roots go back generations, to the farmer selling fresh produce, and the artist sharing their handmade goods."

Of those surveyed, at least 51 percent of visitors from all markets indicated they were "very likely" to return to the state of Hawai'i in the next five years, with U.S. West, Hawai'i's largest major market area, leading the way at 81.4 percent. Over three-quarters (76.7%) of visitors from China, followed by 68.4 percent of visitors from Canada and 67.8 percent of visitors from Korea, are very likely to return in the near future.

Similar to previous quarters, most markets surveyed cited the high cost of vacationing in Hawai'i as the biggest barrier to returning in the next five years. Visitors from Europe cited the flight being too long as the greatest barrier to visiting again in the next five years.

The latest survey results show that visitors' experience on Maui among U.S. West and U.S. East travelers have improved since the August 8 wildfires. The percentage of visitors to Maui that rated their trip "excellent" was 89.8 percent from the U.S. East, 86.3 percent from Europe, 86.2 percent from the U.S. West, and 85.9 percent from Canada. Additionally, the percentage of visitors from

these markets “very likely” to return to Maui in the next five years remained high: U.S. West (71.5%), Canada (63.0%), and U.S. East (59.0%).

Travelers from all markets who visited the island of Maui cited famous landmarks or imagery and natural beauty as their primary motivation to visit, followed by outdoor or sporting activities and events that take place on the island.

“Working closely with the community, HTA is working diligently to educate travelers and encourage mindful visitation to Maui and the rest of the state through targeted branding efforts in our key markets,” said Daniel Nāho‘opi‘i, HTA interim president and CEO. “As you can see in our new U.S. campaign — ‘The People. The Place. The Hawaiian Islands’ — it’s about visually sharing the natural landscapes and uniqueness of our islands by uplifting Hawai‘i’s musicians, lei makers, chefs, farmers, cultural practitioners, fashion designers, and more who rely on a thriving visitor industry.”

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 the first quarter of 2024 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, Europe, Oceania, Korea and China. As of January 2024, HTA has resumed its brand management and visitor education work in Europe, with efforts focused in the United Kingdom, Germany, and Switzerland markets.

DBEDT’s Tourism Research Branch contracted Anthology Research to conduct the VSAT survey. Data were collected between January 9, 2024, and April 9, 2024 among visitors who traveled to Hawai‘i during the first quarter of 2024. A total of 5,538 visitors were surveyed during this period; 1,476 from the U.S. West, resulting in a margin of error of +/- 2.55 percent; 1,821 from the U.S. East, with a corresponding margin of error of +/- 2.30 percent; 261 from Japan, with a margin of error of +/- 6.07 percent; 913 from Canada, with a margin of error of +/- 3.24 percent; 495 from Europe with a margin of error of +/- 4.40, 279 from Oceania, with a margin of error of +/- 5.87 percent; 247 from Korea, with a margin of error of +/- 6.24 percent; and 46 from China, with a margin of error of +/- 14.45 percent. Note all margins of error are presented at the 95 percent level of confidence.

The full results from the Quarter 1, 2024 VSAT are available online at:
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 Hawai‘i – care for our beloved home. For more information about HTA, visit hawaiitourismauthority.org or follow @HawaiiHTA on [Facebook](#), [Instagram](#), Threads and [Twitter](#).

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