

VISITOR COVID-19 STUDY

January 2021

Prepared for:
Hawai'i Tourism Authority

RESEARCH METHODOLOGY

- Online survey conducted December 21, 2020 – January 4, 2021 among visitors to Hawaii from U.S. Mainland.
 - 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.)
- All respondents visited Hawaii during December 2020.

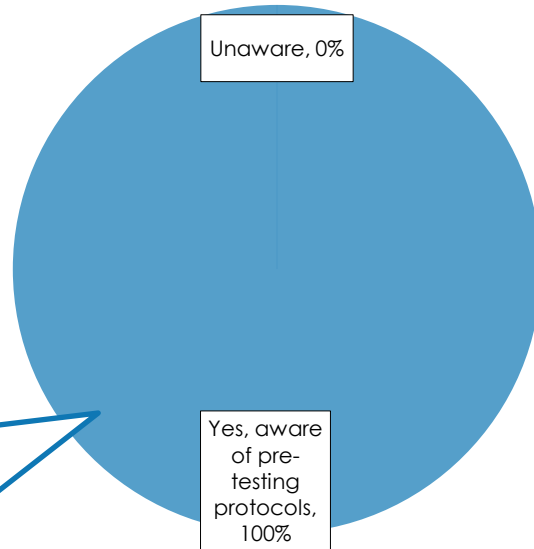
MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	299	5.67	13%
U.S. East	196	7.00	12%
TOTAL	495	4.40	13%

*Margins of error are presented at the 95 percent level of confidence

PRE-ARRIVAL TESTING PROTOCOLS

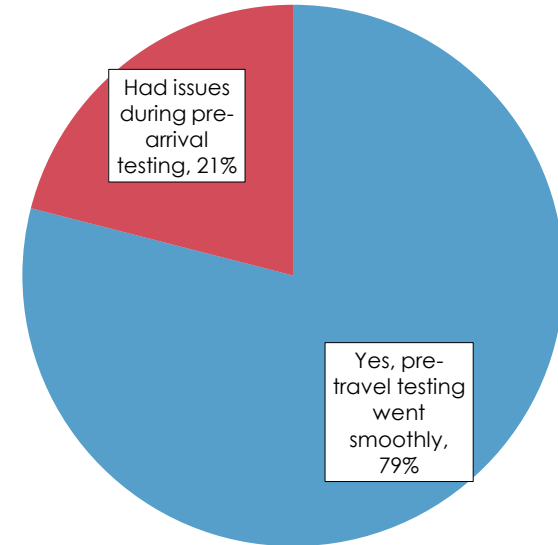
PRE-ARRIVAL COVID-19 TESTING

PRE-ARRIVAL UNDERSTANDING OF TESTING PROTOCOLS

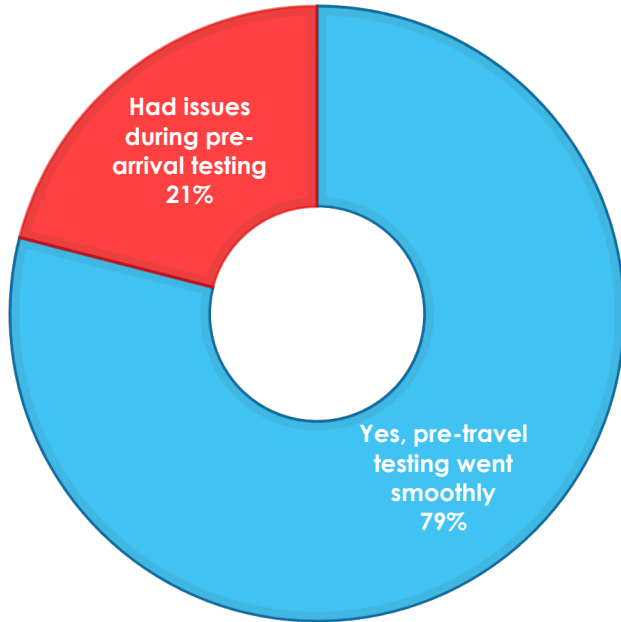


Nearly every visitor who took part in the survey (less than 1% unaware) was aware of the State's pre-testing protocols prior to arrival.

PRE-ARRIVAL TESTING EXPERIENCE



PRE-ARRIVAL COVID-19 TESTING EXPERIENCE

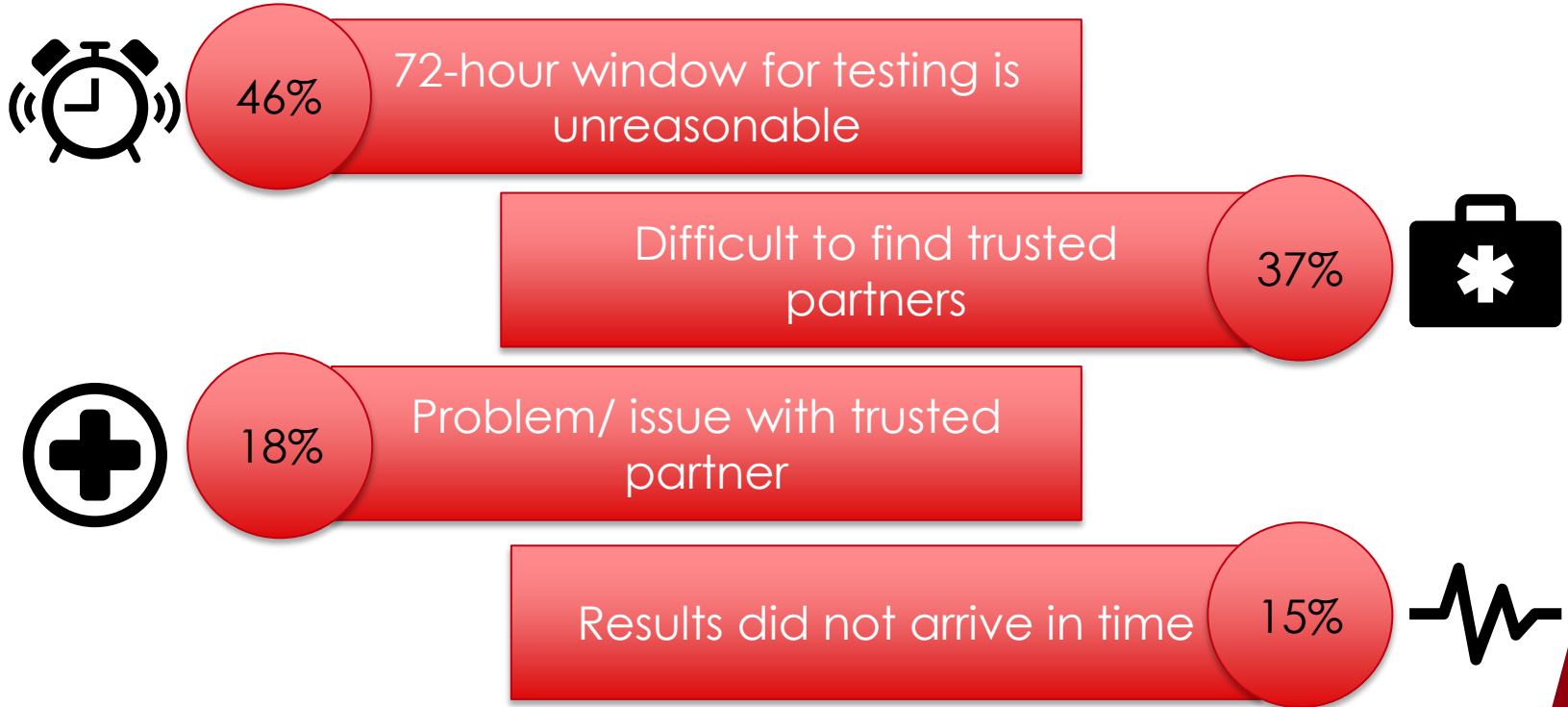


Experienced Issues with Testing (by MMA)

US West: 18%
US East: 25%

PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES

TOP RESPONSES GIVEN
BASE=103



PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES

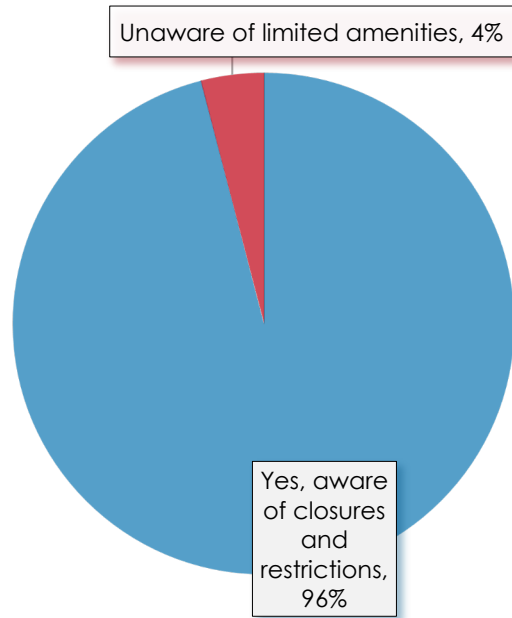
SEGMENTATION ANALYSIS

- *Difficulty finding trusted partner for testing was more of an issue for US East travelers.*
- *US West travelers had greater difficulty getting test results to arrive in time for their arrival date.*
- *Finding a trusted partner was more an an issue for less affluent visitors.*

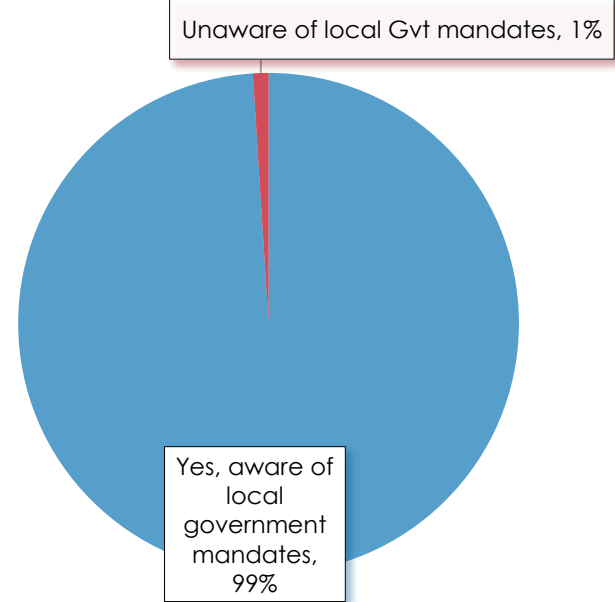
PRE-ARRIVAL EXPECTATIONS/ FAMILIARITY WITH COVID PROTOCOLS

PRE-ARRIVAL UNDERSTANDING OF LOCAL CLIMATE

AWARE OF LIMITED TOURISM AMENITIES



AWARE OF LOCAL GOVT MANDATES



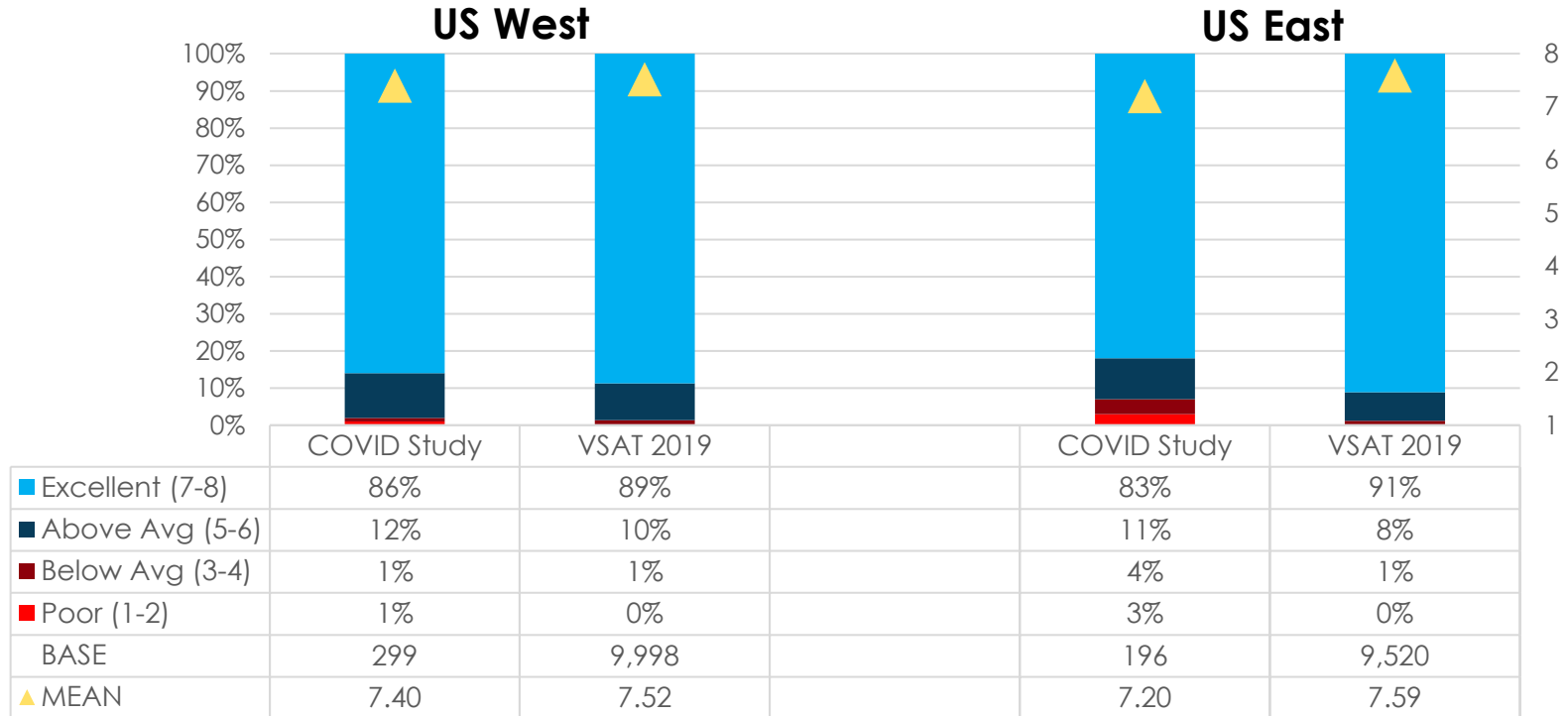
Q. Were you aware, before arriving in Hawai'i, that some businesses such as restaurants, bars, gyms, as well as some visitor attractions such as Hanauma Bay, shopping centers, and retail stores, were closed or were required to operate at less than full capacity?

Q. Were you aware, before arriving in Hawai'i, that government mandates were in place such as wearing of masks whenever outdoors, keeping social distances, etc.?

VISITOR SATISFACTION

VISITOR SATISFACTION – TRIP TO HAWAI‘I

8-pt Rating Scale
8=Excellent / 1=Poor



AREAS OF OPPORTUNITY

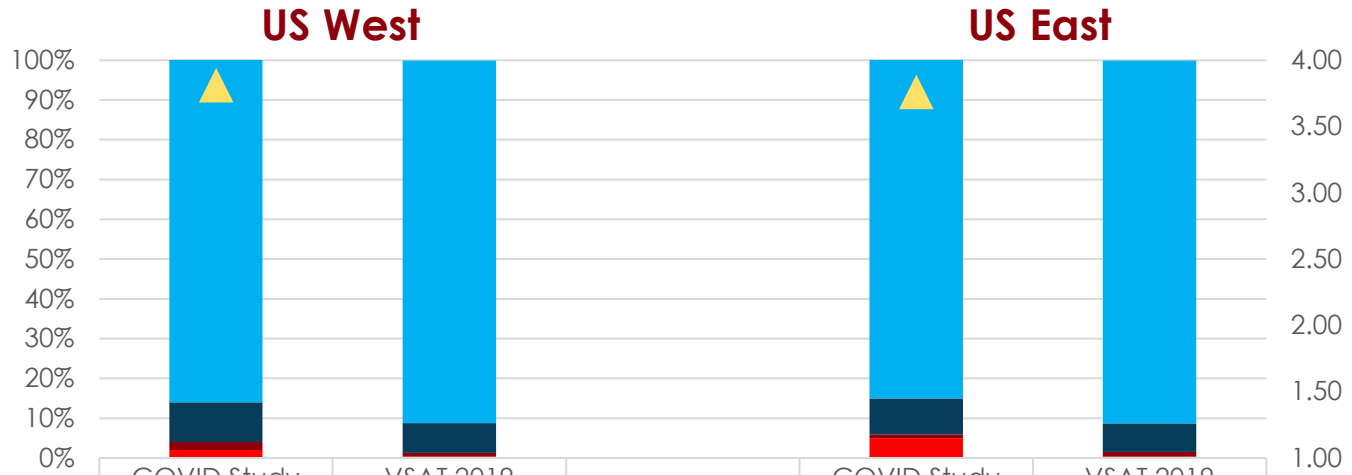
TOP RESPONSES GIVEN

	n=75
Open businesses/ attractions/ beaches	39%
COVID mandates/ rules are confusing	27%
Had to quarantine	12%
End of the pandemic	7%
Unfriendly local residents	5%

BRAND ADVOCACY – HAWAI'I

4-pt Rating Scale

Note: 2019 VSAT study methodology utilized was an 8-point scale vs 4-point scale in the current study.



	COVID Study	VSAT 2019	COVID Study	VSAT 2019
Very likely (4)	87%	91%	86%	91%
Somewhat likely (3)	10%	8%	9%	7%
Somewhat unlikely (2)	2%	1%	1%	1%
Very unlikely (1)	2%	0%	5%	0%
BASE	299	9,998	196	9,520
MEAN	3.81		3.76	

REASONS FOR NOT RECOMMENDING HAWAI'I

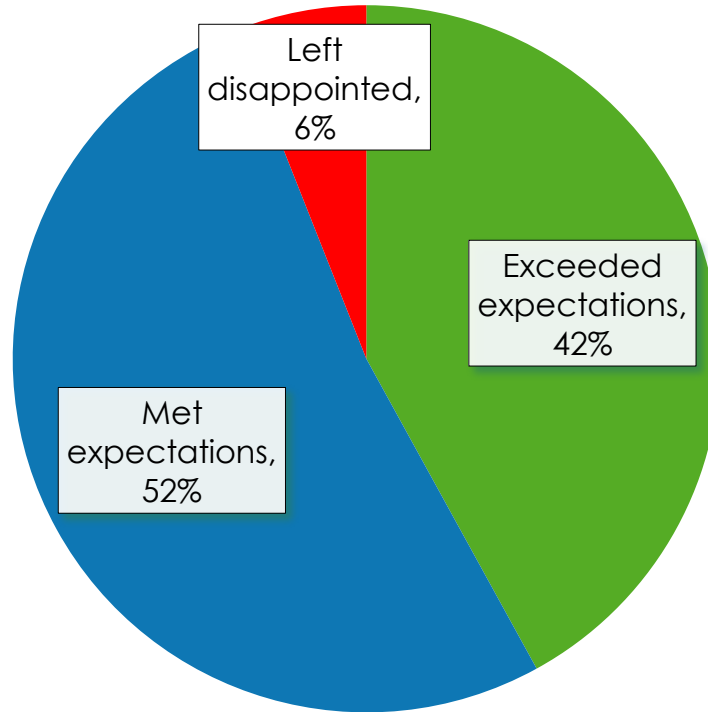
TOP RESPONSES GIVEN

	n=21
COVID-19 testing requirements are unreasonable	57%
Additional expenses and time required to travel	19%
Closures of businesses, attractions, natural landmarks	14%
Quarantine/ other restrictions	10%



TRIP EXPECTATIONS

Most visitors felt this trip either met or exceeded their expectations.

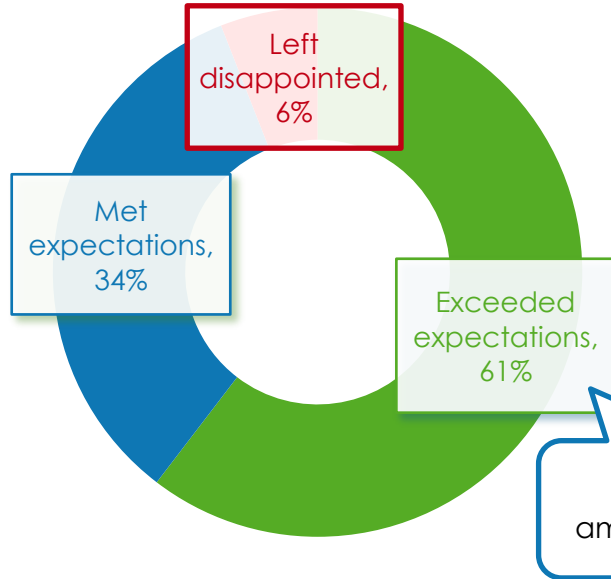


Younger visitors were more likely to feel that their trip exceeded their expectations. For example, 60% of travelers under the age of 35 felt this trip exceeded their expectations. This feeling declines with age until it bottoms out at 18% among seniors.

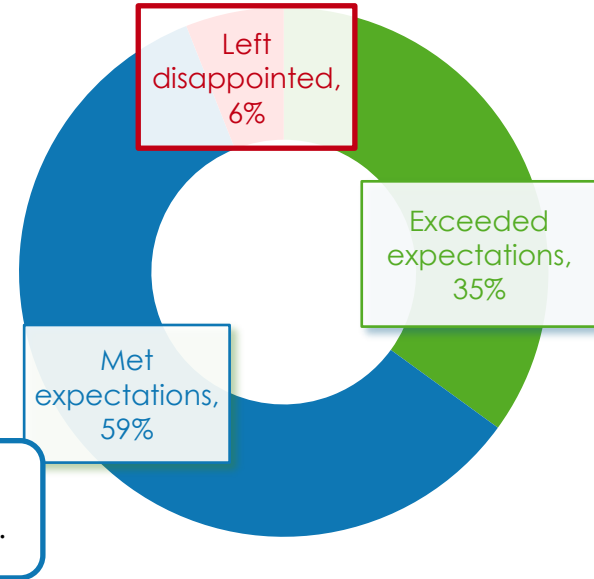
Q. Thinking of this trip and your expectations before arriving, would you say this trip exceeded your expectations, met your expectations, or were left disappointed?

TRIP EXPECTATIONS

FIRST-TIME VISITOR



REPEAT VISITOR



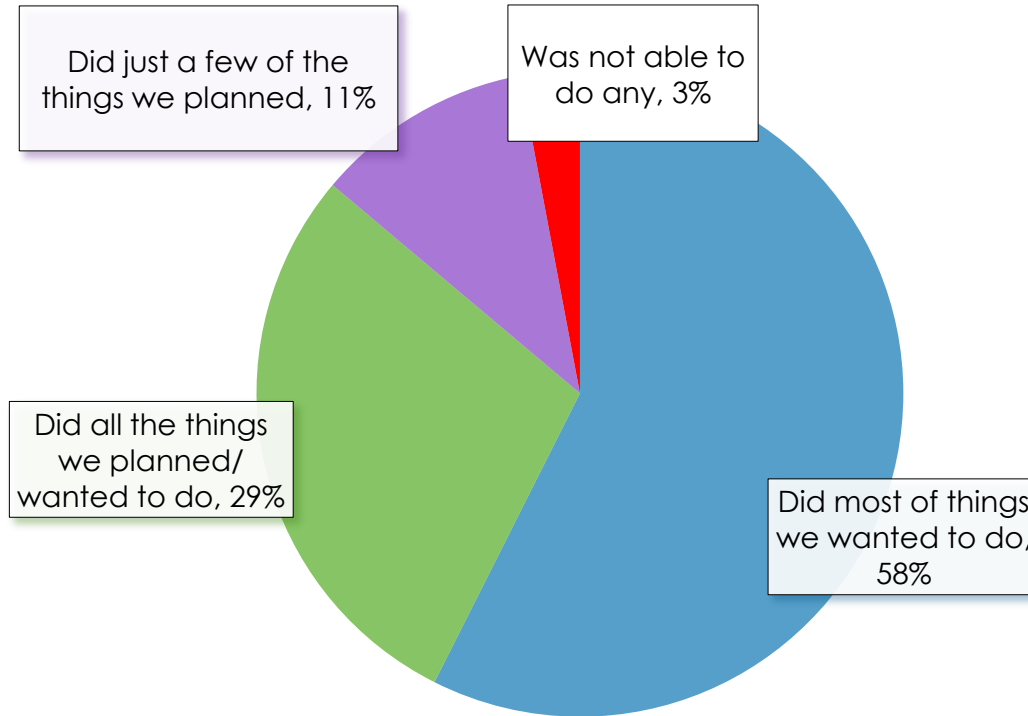
Higher satisfaction among first-time visitors.

TRIP EXPECTATIONS – REASONS FOR DISAPPOINTMENT

	n=31
Quarantine/ testing requirements	42%
Closure of businesses/ attractions	26%
Didn't get to do all the things I wanted	19%
Social distancing guidelines	10%
COVID-19	10%



PLANNED ACTIVITY/ ATTRACTION PARTICIPATION



OBSTACLES TO PLANNED ACTIVITY/ ATTRACTION PARTICIPATION

n=65	
Closures of businesses/ attractions	51%
Quarantine/ testing requirements	22%
COVID-19	18%
Social distancing requirements	11%
Weather	5%

LIKELIHOOD OF RETURN TRIP TO HAWAII

Taking COVID-19 Into Consideration

First-time visitors more likely to visit again once restrictions are lifted and attraction/businesses open.

	n=495
I will visit again when the pandemic is over and most or all of the COVID mandates and restrictions are removed	20%
I will visit again when I have completed the vaccination process	18%
I will visit again when there is no quarantine and no pre-visit coronavirus tested requirement	17%
I will visit again within the next year or two	12%
I will visit again when I am able to (finance/ time/ opportunity)	8%
I have no plans to return at this time	6%

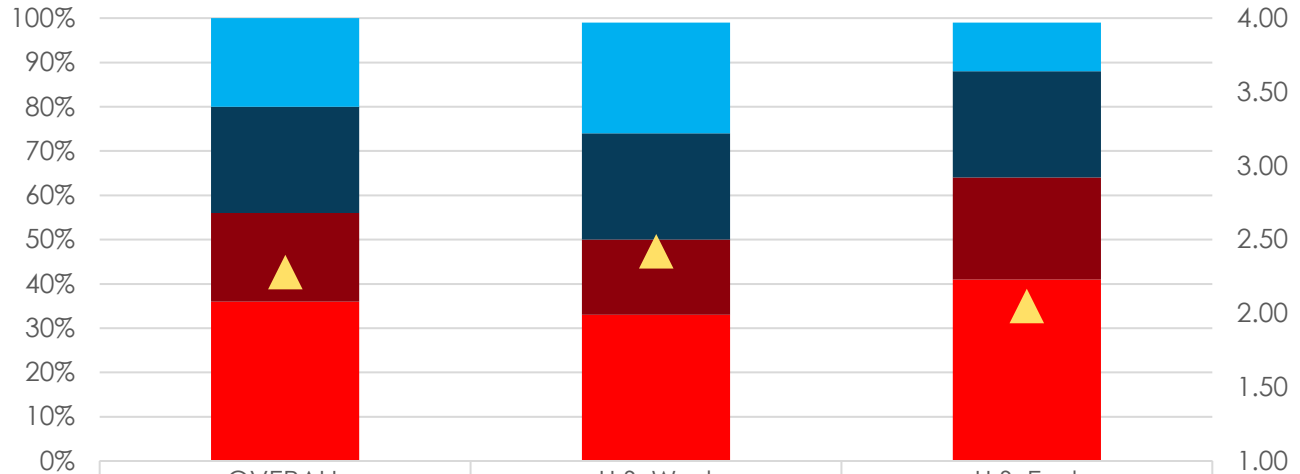
Visitors from US West as well as repeat visitors are more likely to visit once they are vaccinated.

COVID-19

IMPACT OF LOCAL INFECTION RATE ON TRIP PLANNING

4-pt Rating Scale

Hawai'i's relatively low COVID-19 infection rate is more of an incentive to travel here amongst US West visitors.

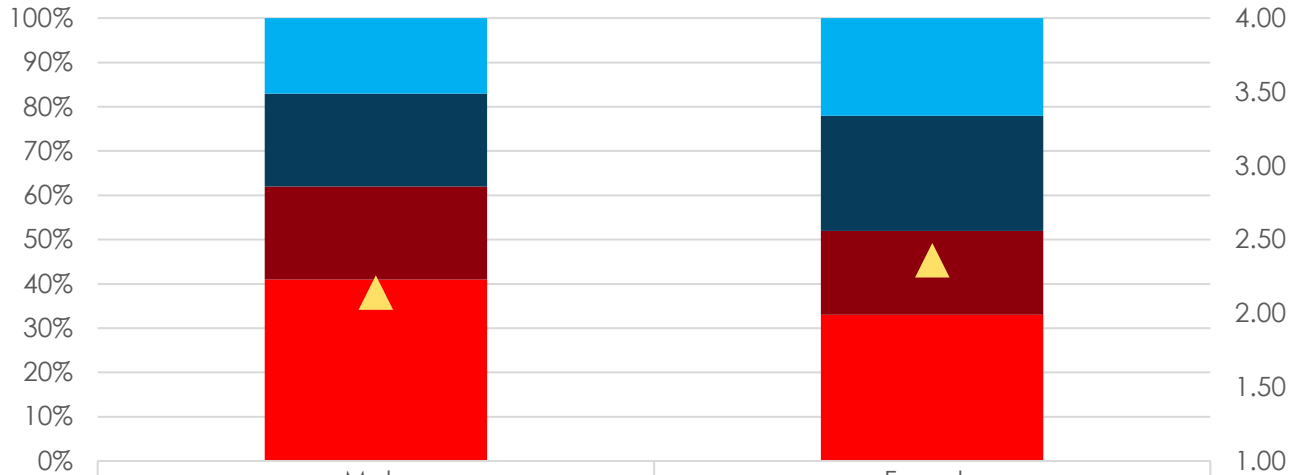


	OVERALL	U.S. West	U.S. East
Very important (4)	20%	25%	11%
One of several reasons (3)	24%	24%	24%
Very little impact (2)	20%	17%	23%
Had no bearing (1)	36%	33%	41%
BASE	495	299	196
MEAN	2.28	2.42	2.05

IMPACT OF LOCAL INFECTION RATE ON TRIP PLANNING

4-pt Rating Scale

Hawai'i's relatively low COVID-19 infection rate has more of an impact during the travel planning process among females.

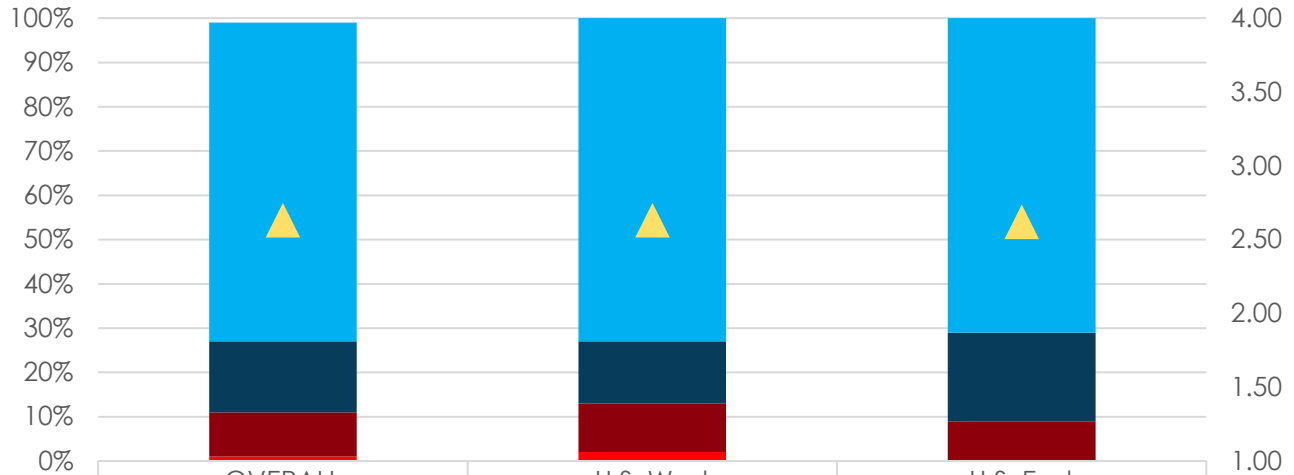


	Male	Female
Very important (4)	17%	22%
One of several reasons (3)	21%	26%
Very little impact (2)	21%	19%
Had no bearing (1)	41%	33%
BASE	184	311
MEAN	2.14	2.36

PERCEPTION OF COVID-19 IMPACT ON HEALTH

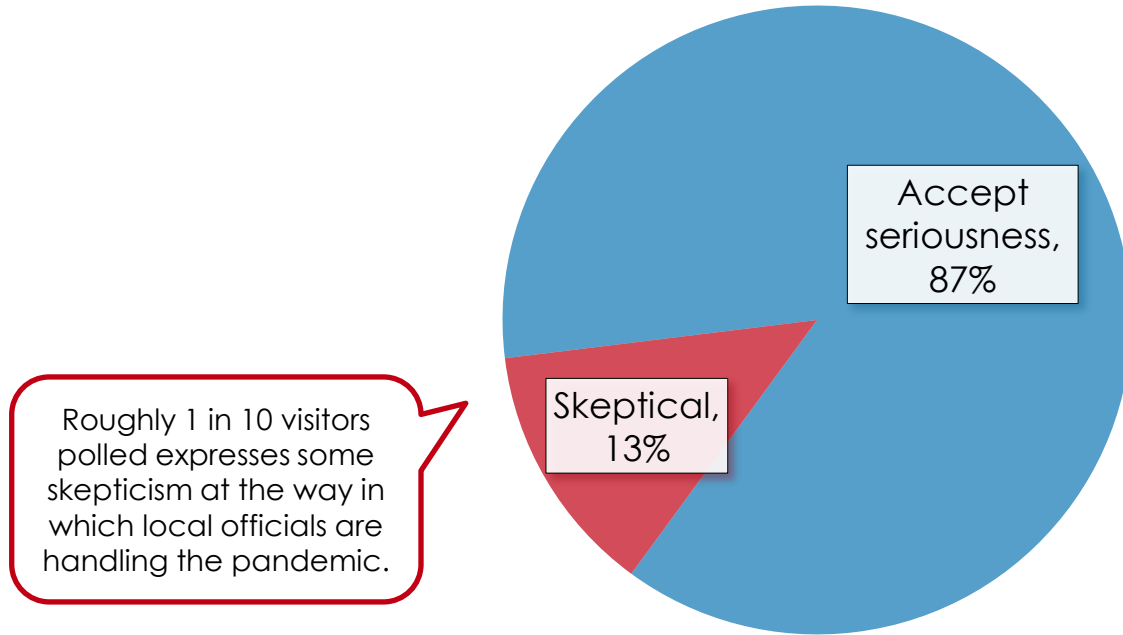
4-pt Rating Scale

Most of the visitors surveyed view COVID-19 as a serious personal health threat.

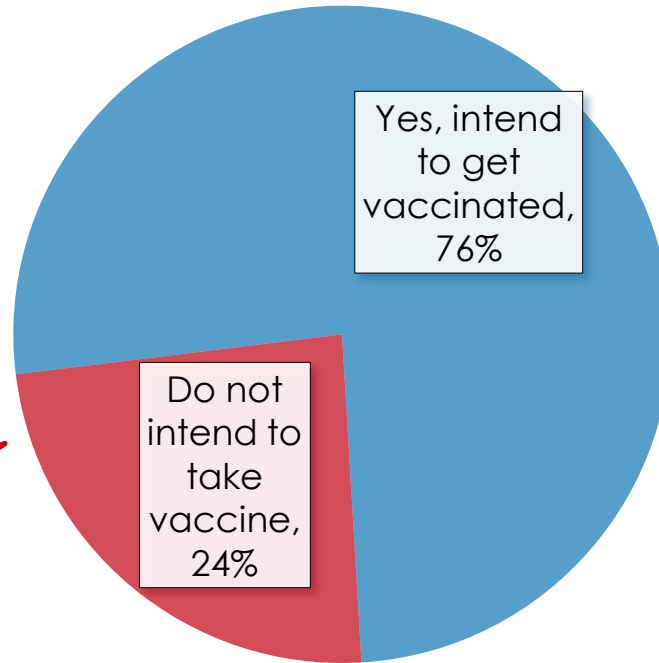


	OVERALL	U.S. West	U.S. East
■ Serious and urgent (4)	72%	73%	71%
■ Serious but not urgent (3)	16%	14%	20%
■ Concern but no serious (2)	10%	11%	9%
■ Not a concern (1)	1%	2%	
BASE	495	299	196
▲ MEAN	2.63	2.63	2.62

GOVERNMENT'S POSITION OF SERIOUSNESS



COVID-19 VACCINE

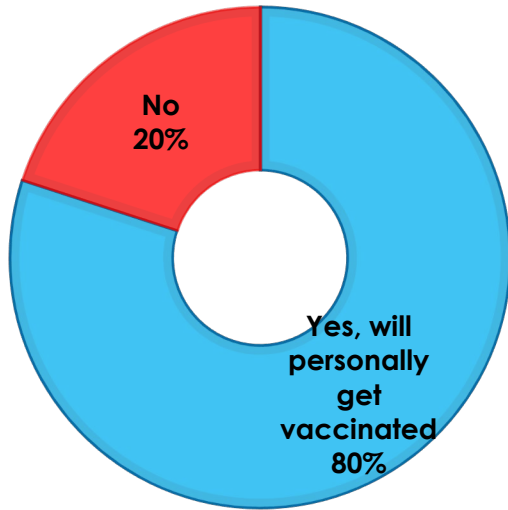


Roughly 1 in 4 visitors are unlikely to get the COVID-19 vaccine.

COVID-19 VACCINE

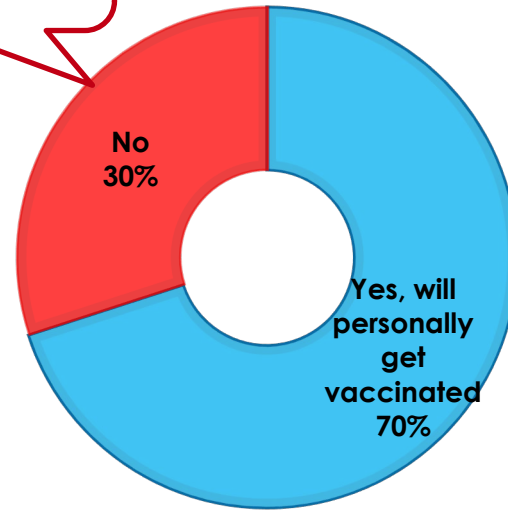
By Market

US WEST



Visitors from US East are less likely to take the vaccine.

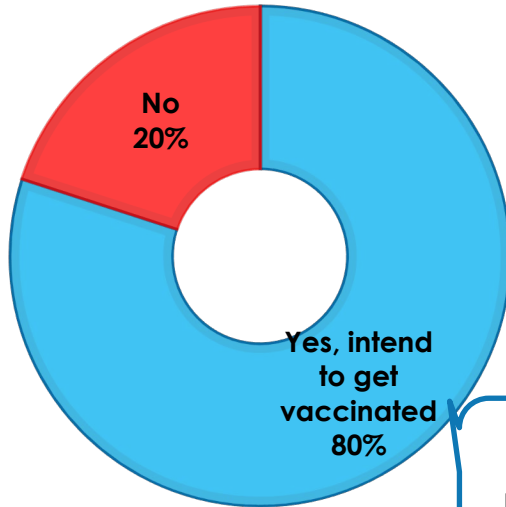
US EAST



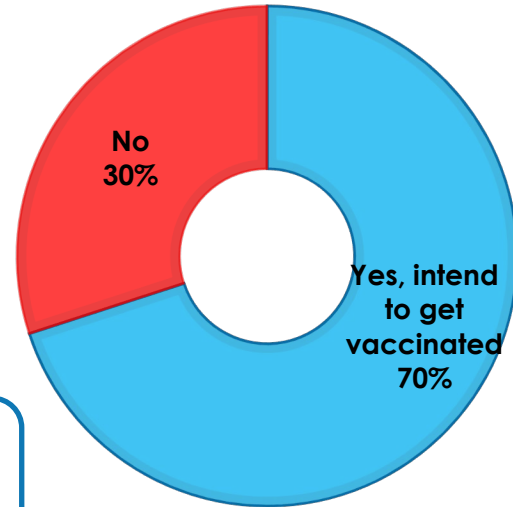
COVID-19 VACCINE

By Education Level

COLLEGE GRADUATE



DO NOT HAVE DEGREE



More educated segments of the visitor base are more likely to get vaccinated.

SOURCES OF COVID-19 INFORMATION

SOURCES OF HAWAI'I COVID-19 INFORMATION

TOP RESPONSES

	n=494
Safe travels website (travel.Hawaii.gov)	95%
Friends and family	38%
GoHawaii.com	34%
HTA website (hawaiiitourismauthority.org)	20%
Airline staff	17%
Social media/ blogs	14%
Online travel sites	10%

More likely to be a source of information among less affluent visitors.

More likely to be referenced by first-time visitors.

RESPONDENT PROFILE

RESPONDENT PROFILE

	Overall
GENDER	
Male	63%
Female	37%
HOUSEHOLD INCOME	
< \$40,000	5%
\$40,000 to \$59,999	7%
\$60,000 to \$79,999	10%
\$80,000 to \$99,999	8%
\$100,000 to \$124,999	11%
\$125,000 to \$149,999	7%
\$150,000 to \$174,999	9%
\$175,000 to \$199,999	6%
\$200,000 to \$249,999	6%
\$250,000 +	14%
Refused	17%
EDUCATION	
Post-graduate	39%
College graduate	29%
Some college	12%
Associates degree	10%
Vocational	3%
High school	4%

	Overall
AGE	
18-34	32%
35-49	24%
50-64	29%
65+	14%
MEAN	45.74
MEDIAN	46
TRIPS TO HAWAII	
First-time	28%
Repeat	72%
ISLANDS VISITED	
O'ahu	64%
Island of Hawai'i	26%
Maui	18%
Kaua'i	4%
Lana'i	0%
Moloka'i	0%
ISLANDS VISITED	
Single island	91%
Multi-island trip	9%

	Overall
ACCOMMODATIONS	
Hotel/ villa/ resort	36%
Friends/ family	19%
Condo/ Apartment	13%
Vacation rental	12%
Timeshare	12%