

VISITOR COVID-19 STUDY

March 2021

Prepared for:
Hawai'i Tourism Authority

RESEARCH METHODOLOGY

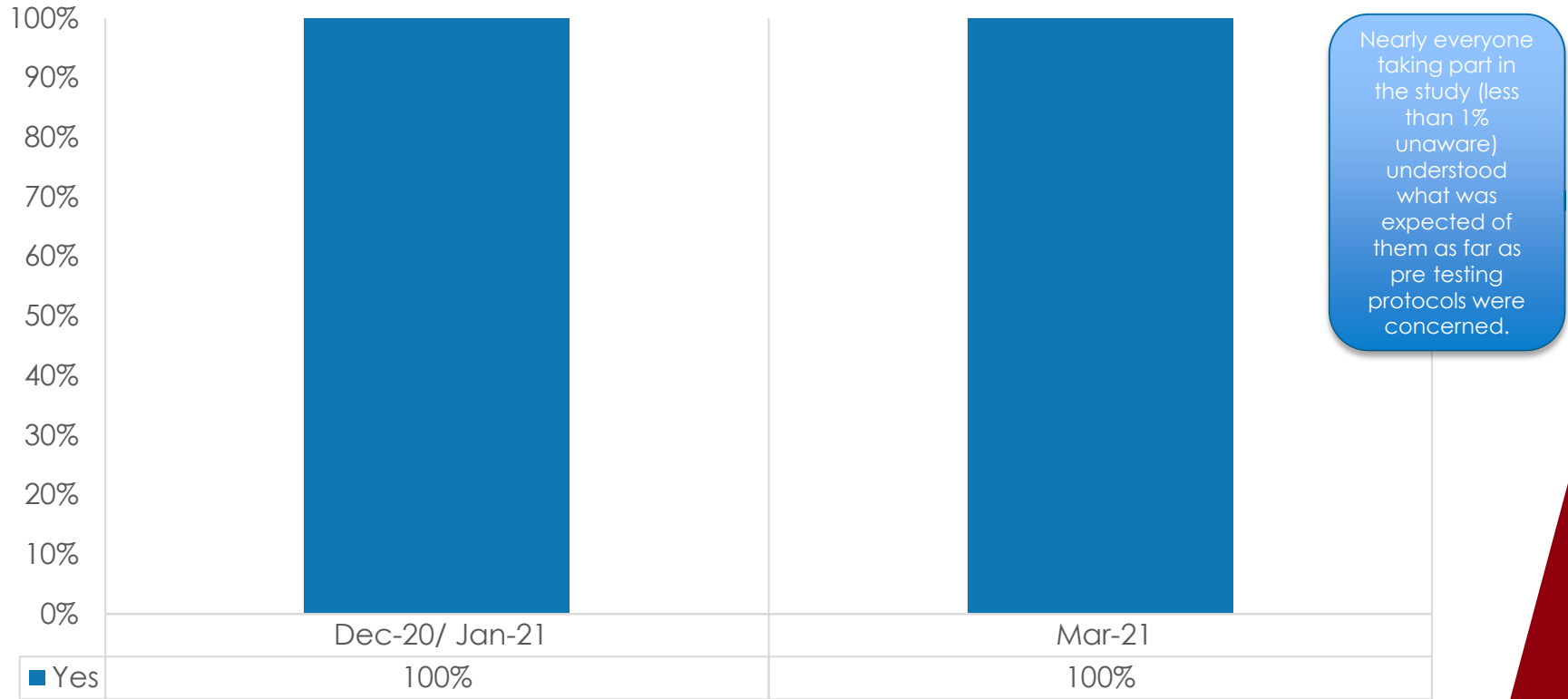
- Online survey conducted March 8, 2021 – March 10, 2021 among visitors to Hawai'i from U.S. Mainland.
 - U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming)
 - U.S. East (all other states in the Continental U.S.)
- All respondents visited Hawai'i from February 12 through February 28.

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	287	5.78%	14.36%
U.S. East	228	6.49%	11.42%
TOTAL	515	4.32%	12.89%

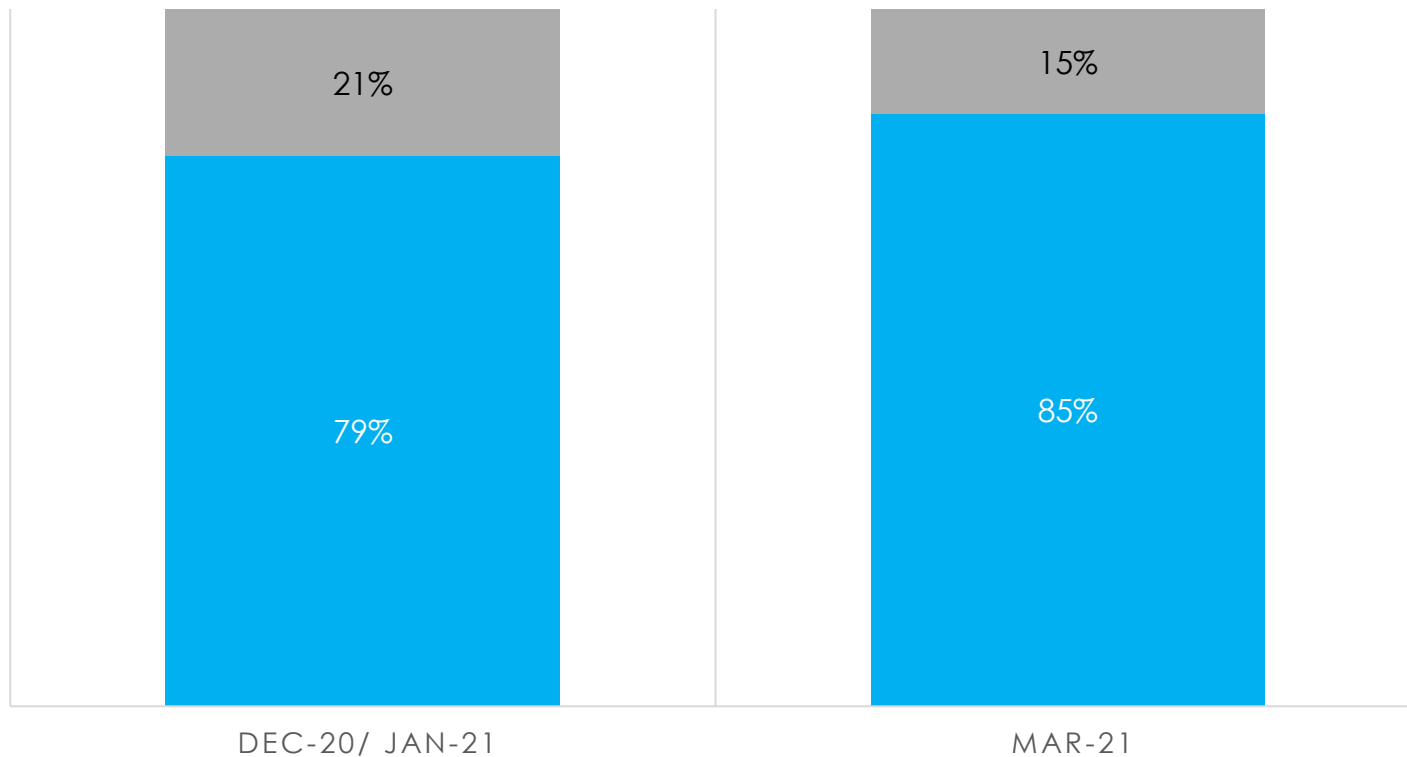
*Margins of error are presented at the 95 percent level of confidence

PRE-ARRIVAL TESTING PROTOCOLS

PRE-ARRIVAL UNDERSTANDING OF TESTING PROTOCOLS



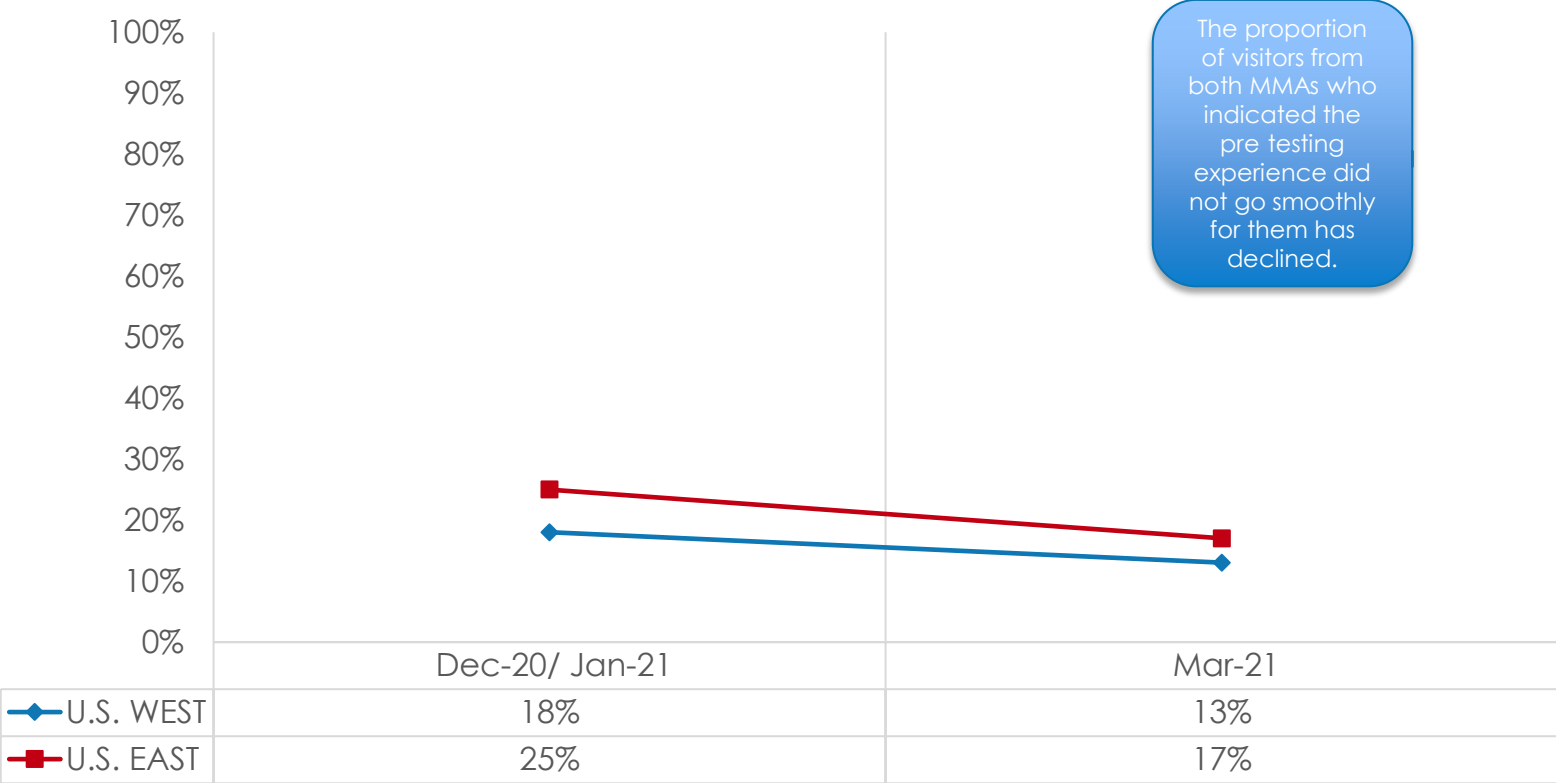
PRE-ARRIVAL TESTING EXPERIENCE



The pre testing experience for visitors has improved, rising six points in the current study, with 85% now saying they had no issues during this process.

■ No
■ Yes

PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES BY MMA



PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES

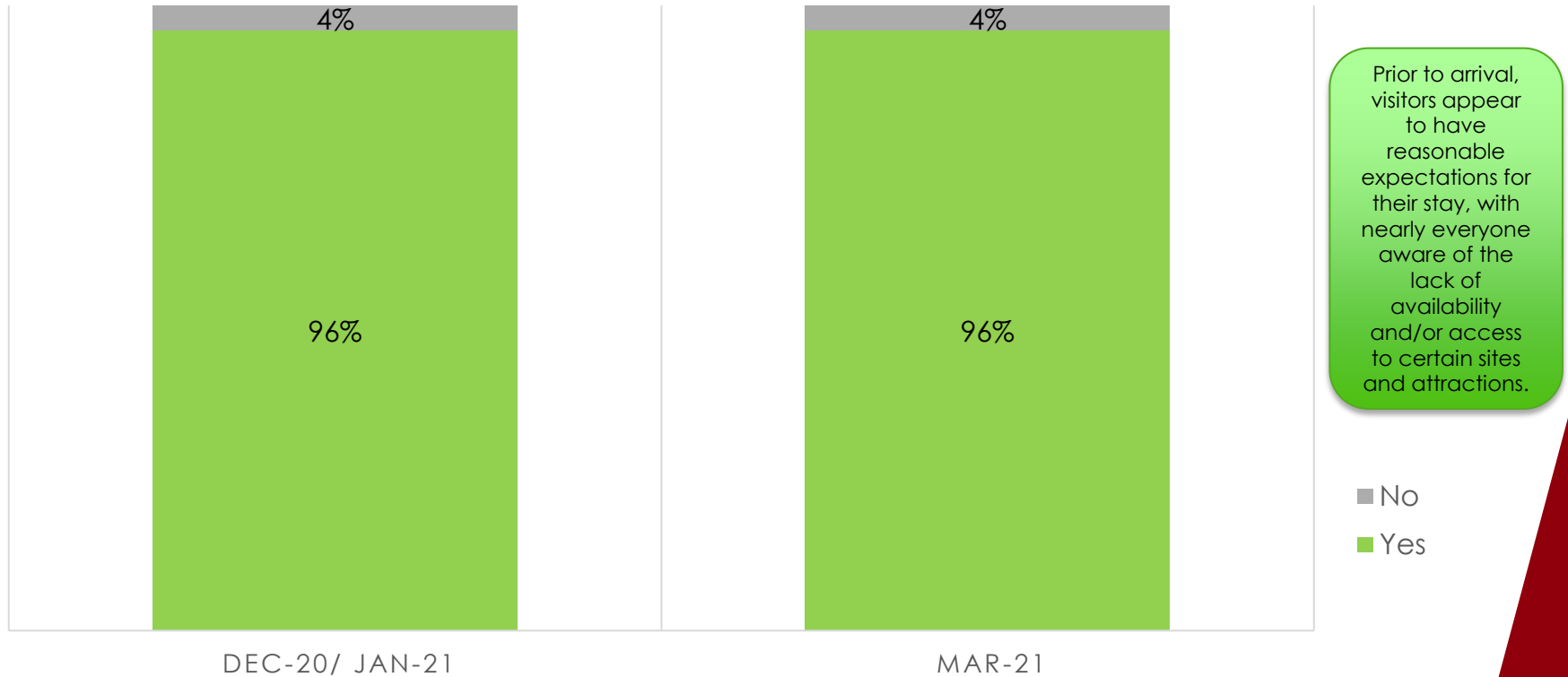
TOP RESPONSES GIVEN

	Dec 20/ Jan 21	Mar 21
BASE	103	76
72-hour window for test results unreasonable	46%	51%
Difficult to find/ access trusted partners	37%	28%
High cost of testing	8%	24%
Test results did not arrive in time	15%	18%
Problems with Hawai'i Travels website	9%	17%
Did not use a trusted partner	4%	7%
Quarantine rules were confusing	-	7%
Issues with trusted partner	18%	5%
Forced to quarantine	8%	3%

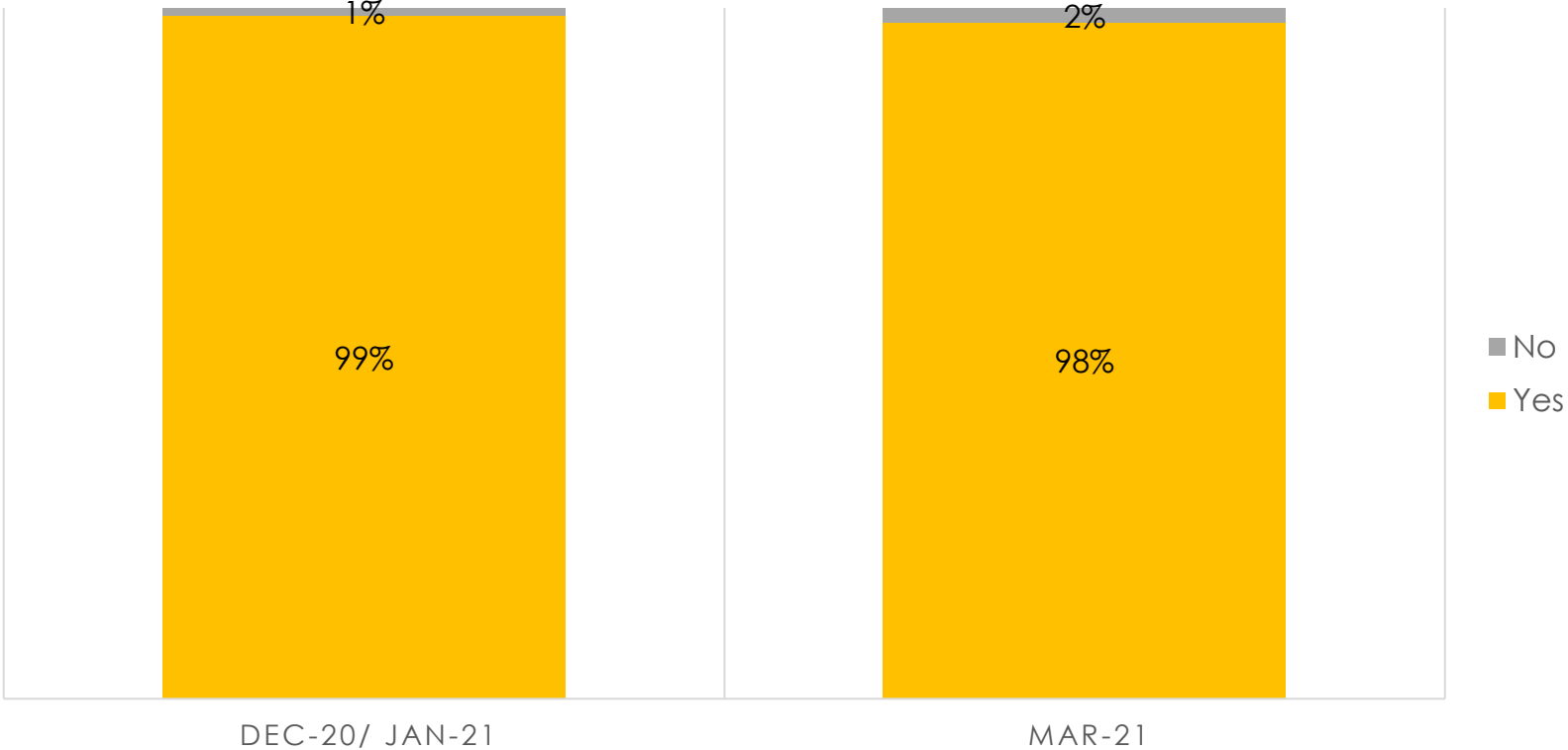
The proportion who have issues with the cost of testing is up this reporting period, while the number who found it difficult to locate a trusted partner is down.

PRE-ARRIVAL EXPECTATIONS/ FAMILIARITY WITH COVID PROTOCOLS

AWARE OF LIMITED TOURISM AMENITIES



AWARE OF LOCAL GOVERNMENT MANDATES

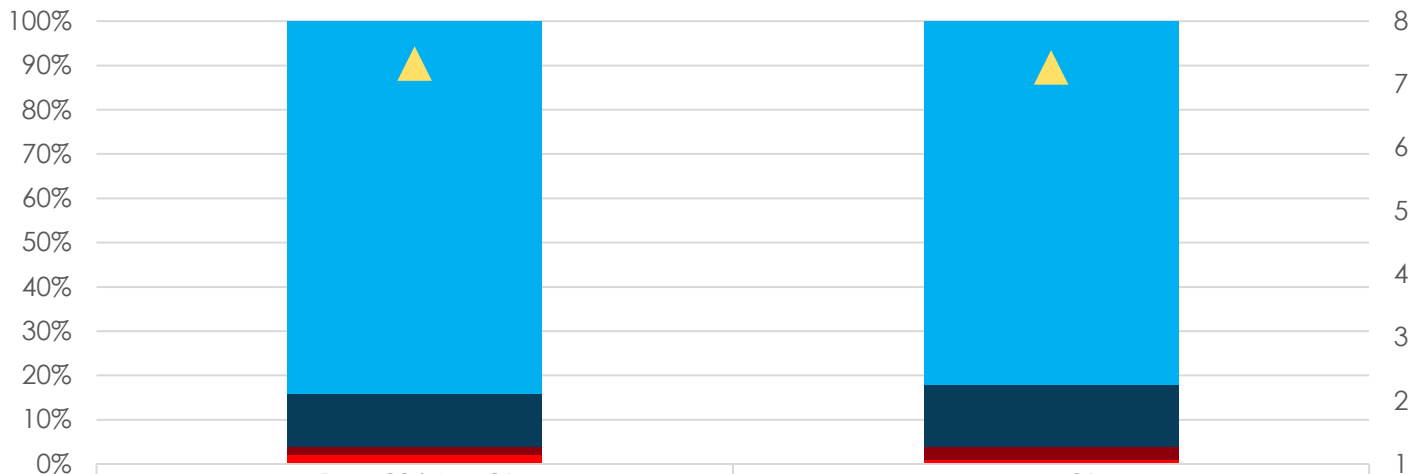


VISITOR SATISFACTION

VISITOR SATISFACTION – TRIP TO HAWAI‘I – OVERALL

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

Overall visitor satisfaction continues to be solid, with the mean score still averaging within the top box (7-8).

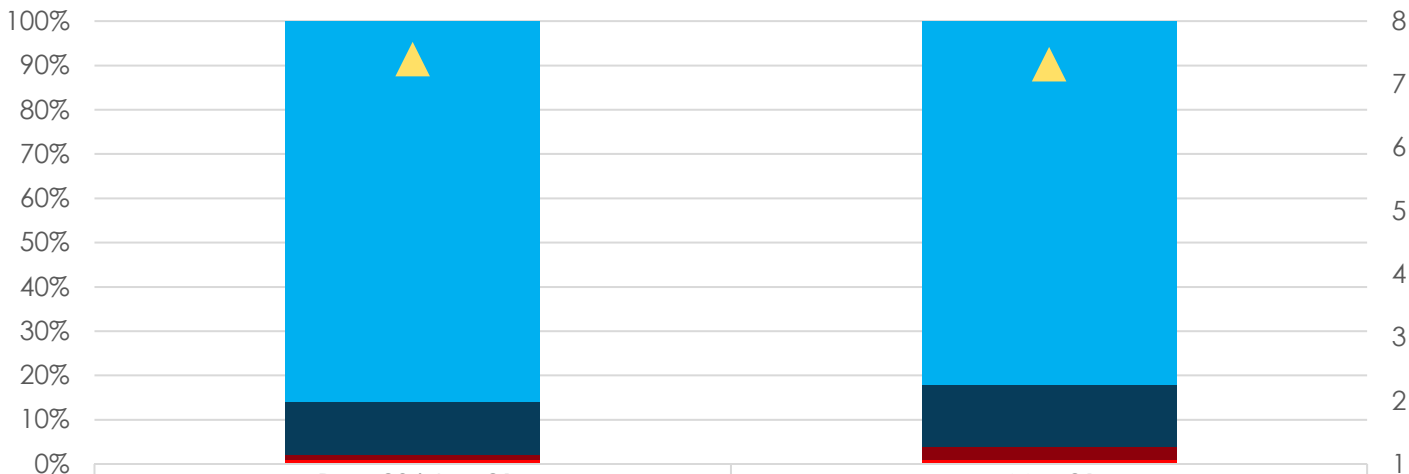


	Dec-20/ Jan-21	Mar-21
■ Excellent (7-8)	85%	82%
■ Above Avg (5-6)	12%	14%
■ Below Avg (3-4)	2%	3%
■ Poor (1-2)	2%	1%
BASE	495	515
▲ MEAN	7.33	7.27

VISITOR SATISFACTION – TRIP TO HAWAI‘I – U.S. WEST

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

Satisfaction amongst visitors from U.S. West remains unchanged.

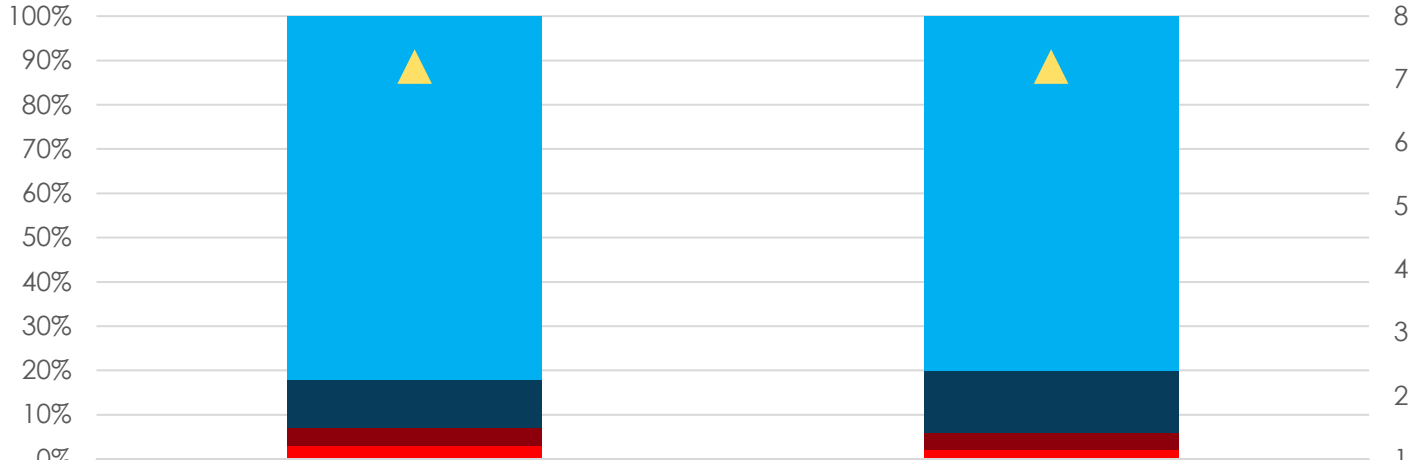


	Dec-20/ Jan-21	Mar-21
■ Excellent (7-8)	86%	83%
■ Above Avg (5-6)	12%	14%
■ Below Avg (3-4)	1%	3%
■ Poor (1-2)	1%	1%
BASE	299	287
▲ MEAN	7.40	7.32

VISITOR SATISFACTION – TRIP TO HAWAI'I – U.S. EAST

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

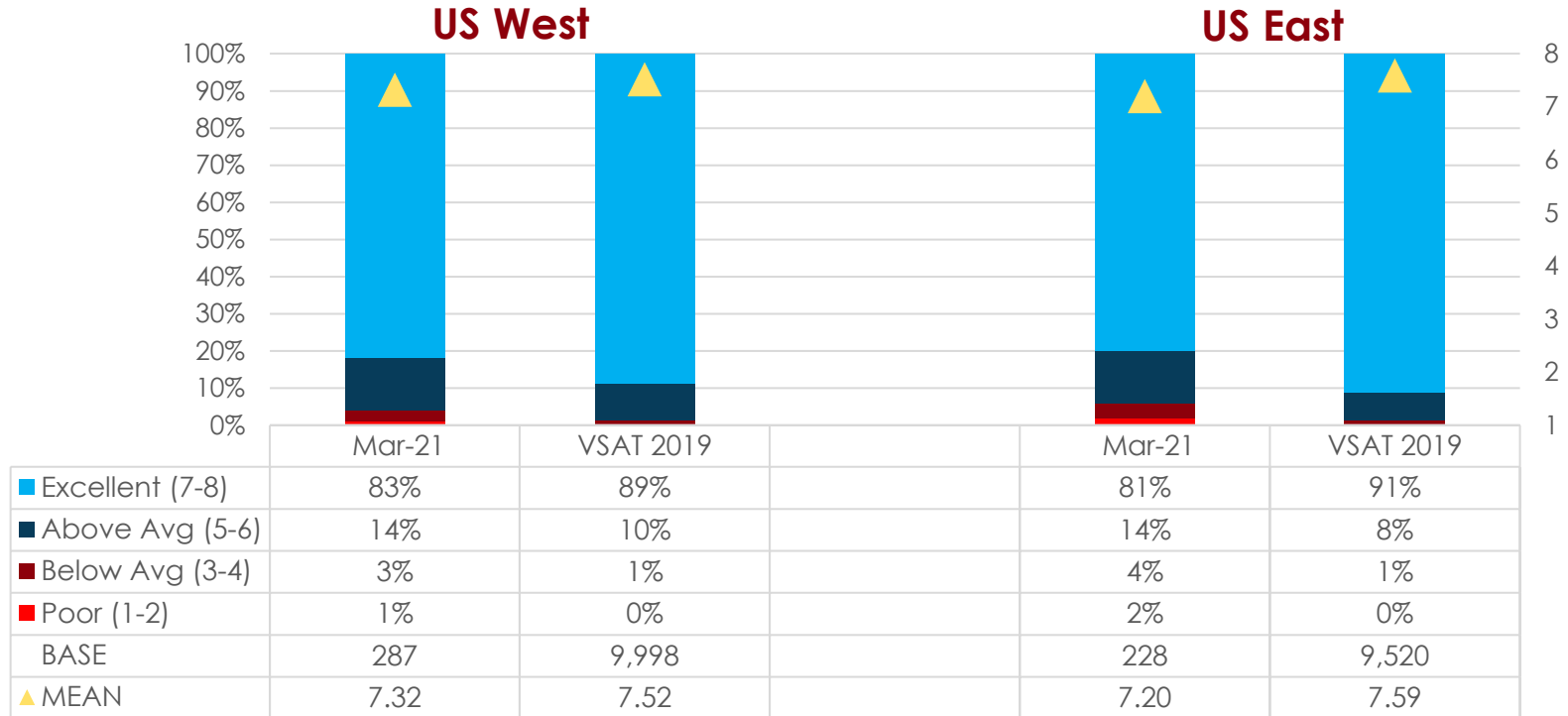
Satisfaction amongst visitors from U.S. East remains unchanged.



	Dec-20/ Jan-21	Mar-21
Excellent (7-8)	83%	81%
Above Avg (5-6)	11%	14%
Below Avg (3-4)	4%	4%
Poor (1-2)	3%	2%
BASE	196	228
▲ MEAN	7.20	7.20

VISITOR SATISFACTION – TRIP TO HAWAI‘I

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



AREAS OF OPPORTUNITY

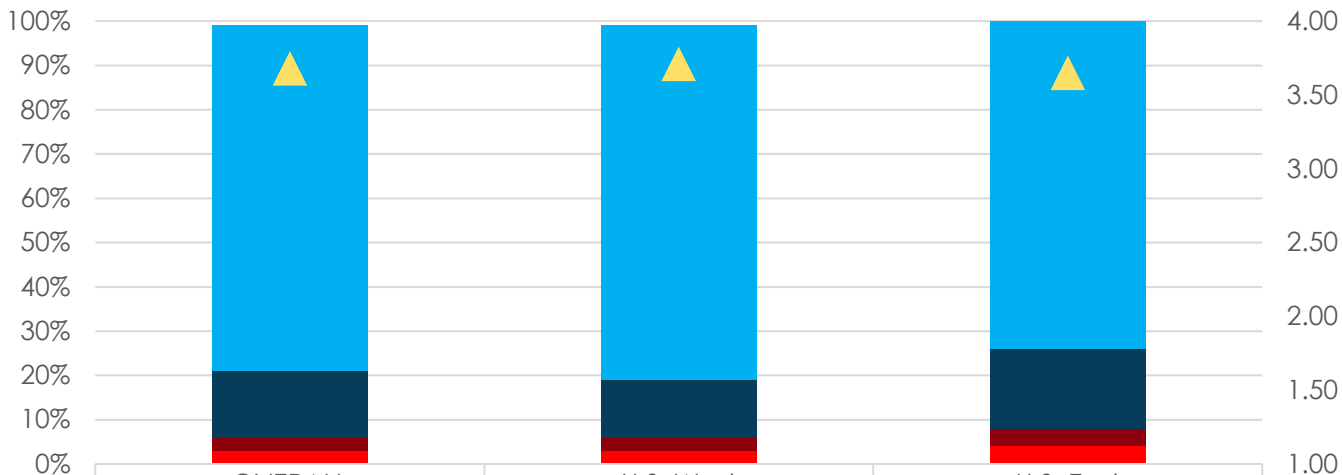
TOP RESPONSES GIVEN

	Dec-20/ Jan-21 n=75	Mar-21 n=93
COVID mandates/ rules are confusing	27%	34%
Open businesses/ attractions/ beaches	39%	33%
Fewer COVID restrictions	-	23%
Weather	-	9%
Businesses should stay open longer	-	6%
Enforcing/ punishing COVID rule breakers	-	6%
Had to quarantine	12%	3%

BRAND ADVOCACY – HAWAI‘I – NEXT SIX MONTHS

4-pt Rating Scale

Most who took part in the research have no issues recommending visiting the state within the next six months.



	OVERALL	U.S. West	U.S. East
Very likely (4)	78%	80%	75%
Somewhat likely (3)	15%	13%	18%
Somewhat unlikely (2)	3%	3%	4%
Very unlikely (1)	3%	3%	4%
BASE	515	287	228
MEAN	3.68	3.71	3.65

BRAND ADVOCACY – HAWAI'I – NEXT SIX MONTHS

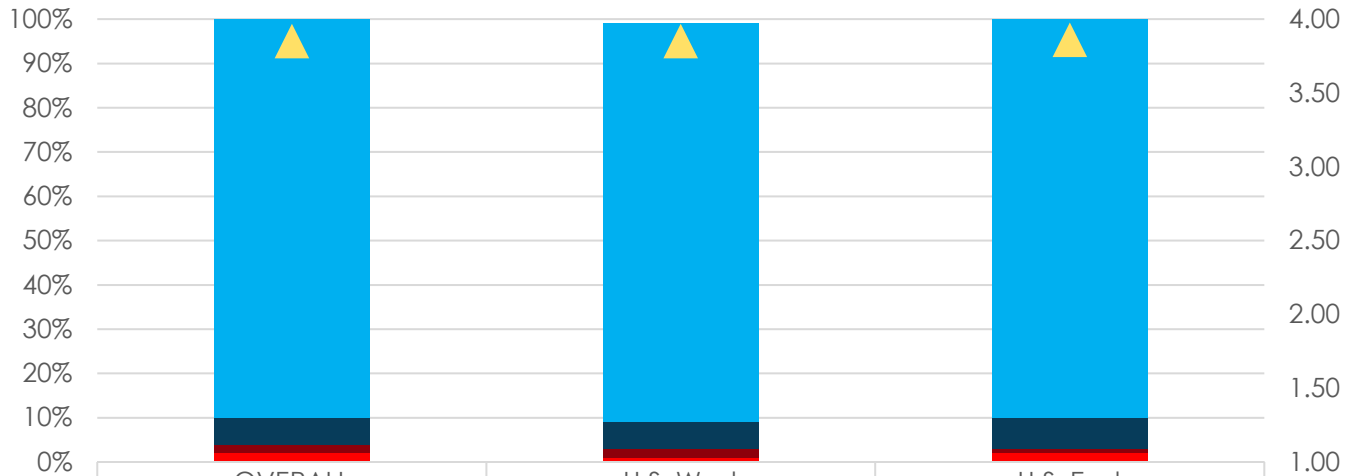
SEGMENTATION ANALYSIS

- *Female travelers more likely to provide a top box (very likely to recommend) score than males.*
- *Younger travelers in the 18-34 and 35-49 age group express a higher likelihood of recommending visiting the state in the next six months compared to seniors.*
- *Those whose trip consisted of visiting a single island show a higher likelihood of recommending visiting the state in the next six months compared to those who visited multiple islands during their most recent trip.*

BRAND ADVOCACY – HAWAI‘I – WHEN QUARANTINE LIFTED

4-pt Rating Scale

A solid majority of visitors polled would be very likely to recommend visiting the state once the quarantine is lifted.

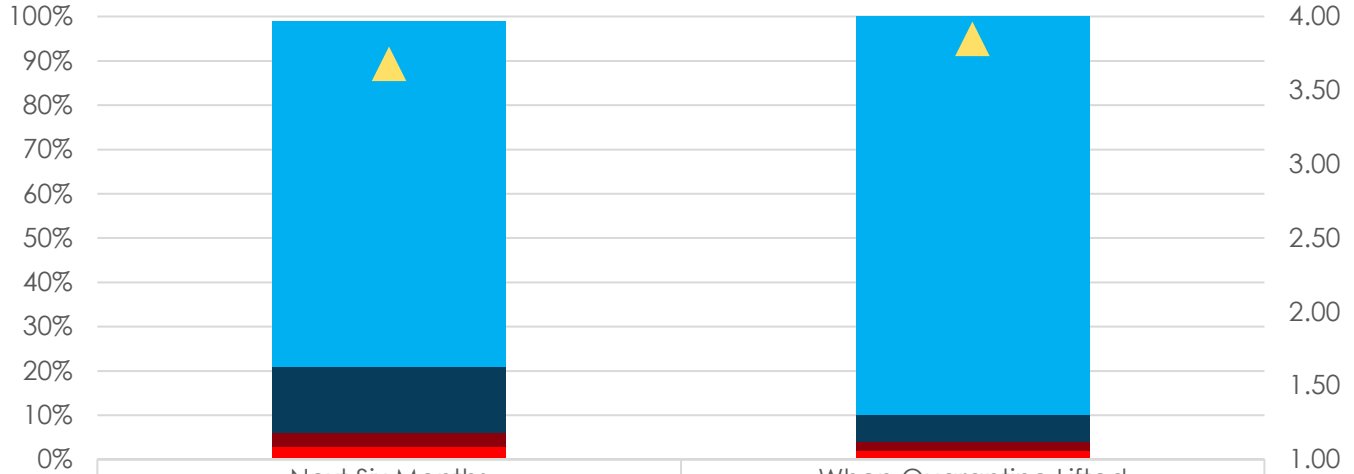


	OVERALL	U.S. West	U.S. East
Very likely (4)	90%	90%	90%
Somewhat likely (3)	6%	6%	7%
Somewhat unlikely (2)	2%	2%	1%
Very unlikely (1)	2%	1%	2%
BASE	515	287	228
MEAN	3.85	3.85	3.86

BRAND ADVOCACY – HAWAI‘I – IMPACT OF QUARANTINE

4-pt Rating Scale

The impact the quarantine has on brand advocacy is evident when comparing top box scores. We see a 12-point increase.



	Next Six Months	When Quarantine Lifted
Very likely (4)	78%	90%
Somewhat likely (3)	15%	6%
Somewhat unlikely (2)	3%	2%
Very unlikely (1)	3%	2%
BASE	515	515
MEAN	3.68	3.85

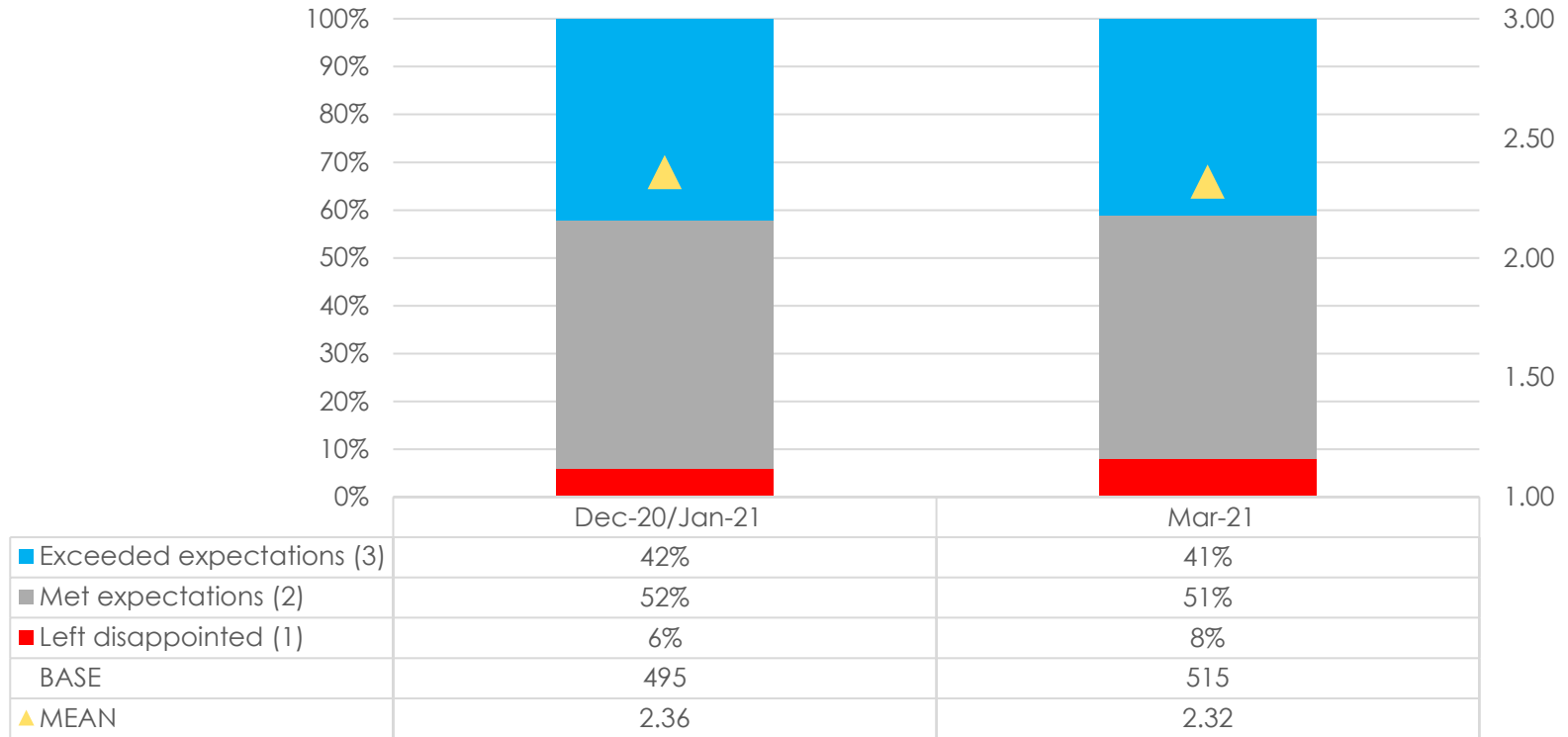
REASONS FOR NOT RECOMMENDING HAWAI'I

TOP RESPONSES GIVEN

	Dec-20/Jan-21 n=21	Mar-21 n=40
Closures of businesses, attractions, natural landmarks	14%	33%
Quarantine/ other restrictions	10%	18%
COVID-19 testing requirements are unreasonable	57%	15%
Safety – homeless, crime, drugs, dirty	-	15%
Felt unwelcome	-	15%
Too expensive	-	15%
Will return when pandemic is over	-	10%
Additional expenses and time required to travel	19%	-



TRIP EXPECTATIONS



TRIP EXPECTATIONS

SEGMENTATION ANALYSIS

- *First-time visitors were more likely to feel this trip exceeded their expectations compared to repeat visitors.*
- *Younger segments, 18-34 and 35-49, were more likely to be of the opinion their trip exceeded their expectations than were those respondents 50 years or older.*

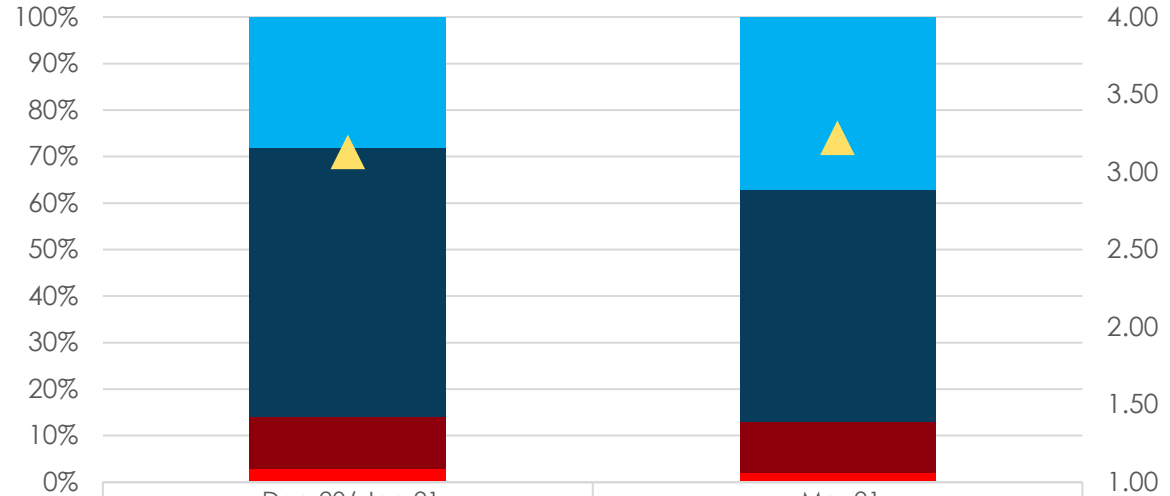
TRIP EXPECTATIONS – REASONS FOR DISAPPOINTMENT

	Dec-20/ Jan-21 n=31	Mar-21 n=43
Closure of businesses/ attractions	26%	33%
Social distancing guidelines	10%	23%
Quarantine/ testing requirements	42%	14%
Safety – crime, homeless, drugs, dirty	-	14%
Enforcing COVID restrictions	3%	7%
Unfriendly locals	3%	7%
Weather	-	7%
Didn't get to do all the things I wanted	19%	5%
COVID-19	10%	-



PLANNED ACTIVITY/ ATTRACTION PARTICIPATION

As the state opens and visitors understand the local climate better, we see the top box (did all planned activities) increasing, indicating increased visitor satisfaction



	Dec-20/ Jan-21	Mar-21
■ Did all of our planned activities (4)	29%	37%
■ Did most of our planned activities (3)	58%	50%
■ Did a few planned activities (2)	11%	11%
■ Not able to do any planned activities (1)	3%	2%
BASE	495	515
▲ MEAN	3.13	3.22

OBSTACLES TO PLANNED ACTIVITY/ ATTRACTION PARTICIPATION

	Dec-20/ Jan-21 n=65	Mar-21 n=67
Closures of businesses/ attractions	51%	45%
Capacity limits – attractions/ businesses	-	16%
Weather	5%	15%
COVID-19	18%	13%
Quarantine/ testing requirements	22%	10%
Restrictions/ masks	-	6%
Not enough time	-	6%
Social distancing requirements	11%	3%

LIKELIHOOD OF RETURN TRIP TO HAWAI'I

Taking COVID-19 Into Consideration

Female visitors were more likely to visit again regardless of the pre-visit requirements.

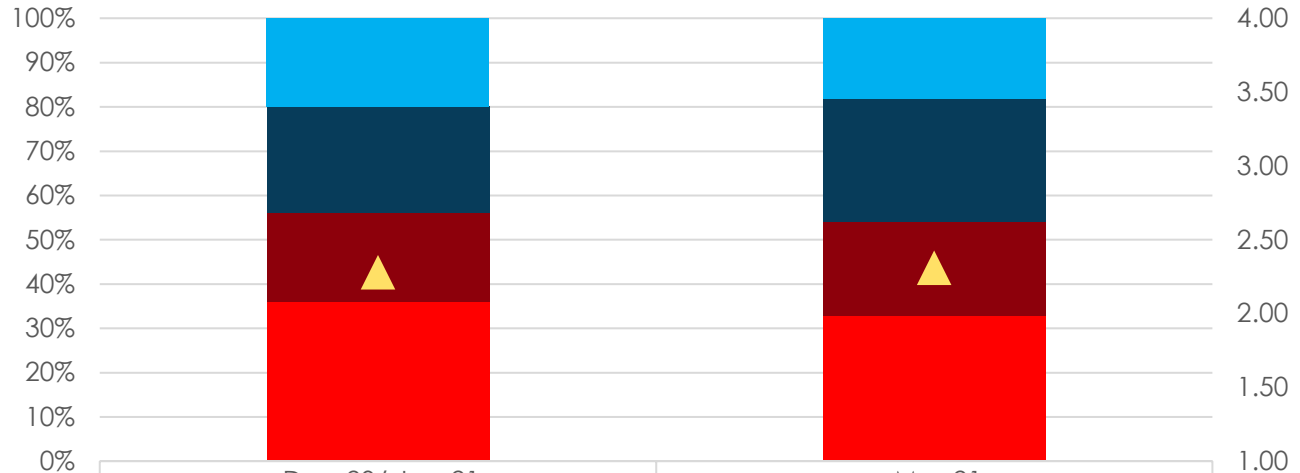
	n=515
I will visit again when I want to regardless of the pre-visit requirements	72%
I will visit again when there is no quarantine and no pre-visit coronavirus testing required	9%
I will visit again when the pandemic is over and most or all of the COVID mandates such as mask wearing, social distancing, and business/ attraction restrictions are removed	9%
I have no plans at this time to ever return to Hawai'i	6%
I will visit again when I have completed the vaccination process	5%

Visitors from US West were more likely to share this sentiment than those from U.S. East.

COVID-19

IMPACT OF LOCAL INFECTION RATE ON TRIP PLANNING – OVERALL

4-pt Rating Scale

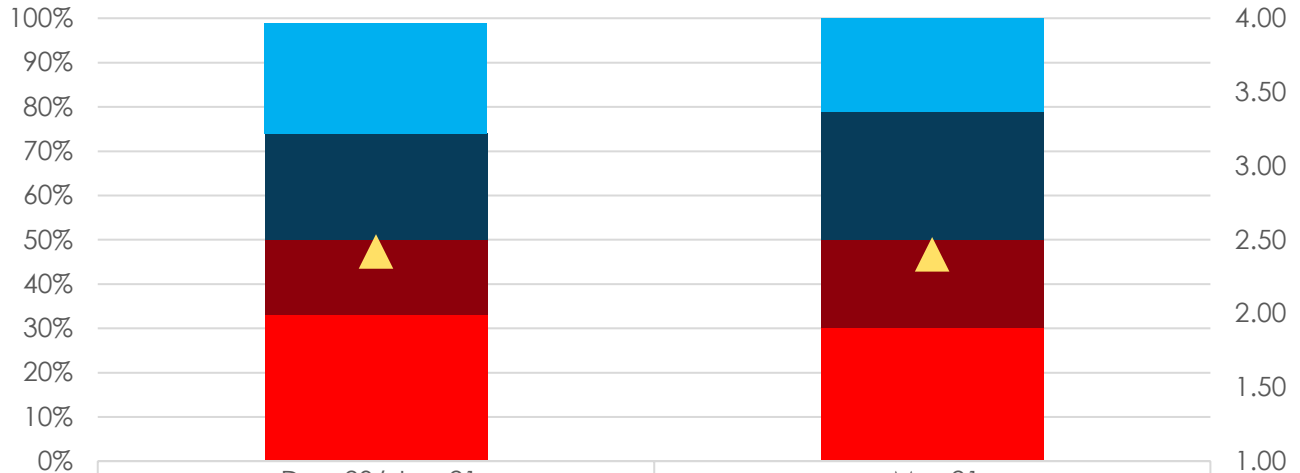


	Dec-20/ Jan-21	Mar-21
■ Very important (4)	20%	18%
■ One of several reasons (3)	24%	28%
■ Very little impact (2)	20%	21%
■ Had no bearing (1)	36%	33%
BASE	495	515
▲ MEAN	2.28	2.31

IMPACT OF LOCAL INFECTION RATE ON TRIP PLANNING – U.S.WEST

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.

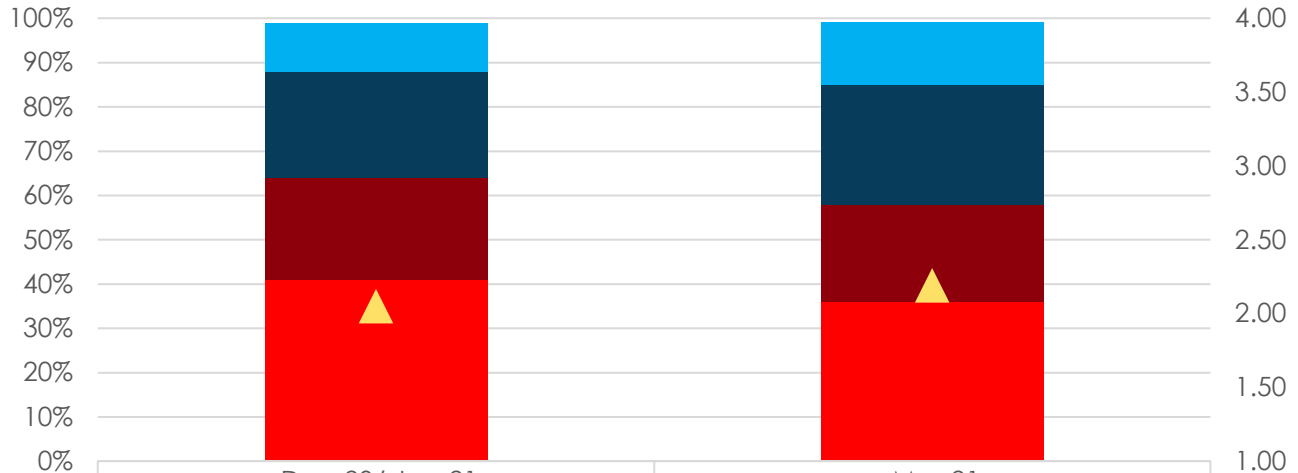


	Dec-20/ Jan-21	Mar-21
Very important (4)	25%	21%
One of several reasons (3)	24%	29%
Very little impact (2)	17%	20%
Had no bearing (1)	33%	30%
BASE	299	287
▲ MEAN	2.42	2.40

IMPACT OF LOCAL INFECTION RATE ON TRIP PLANNING – U.S. EAST

4-pt Rating Scale

The level of importance placed on low infection rates amongst visitors from U.S. East is trending upwards though is still lower compared to U.S. West.

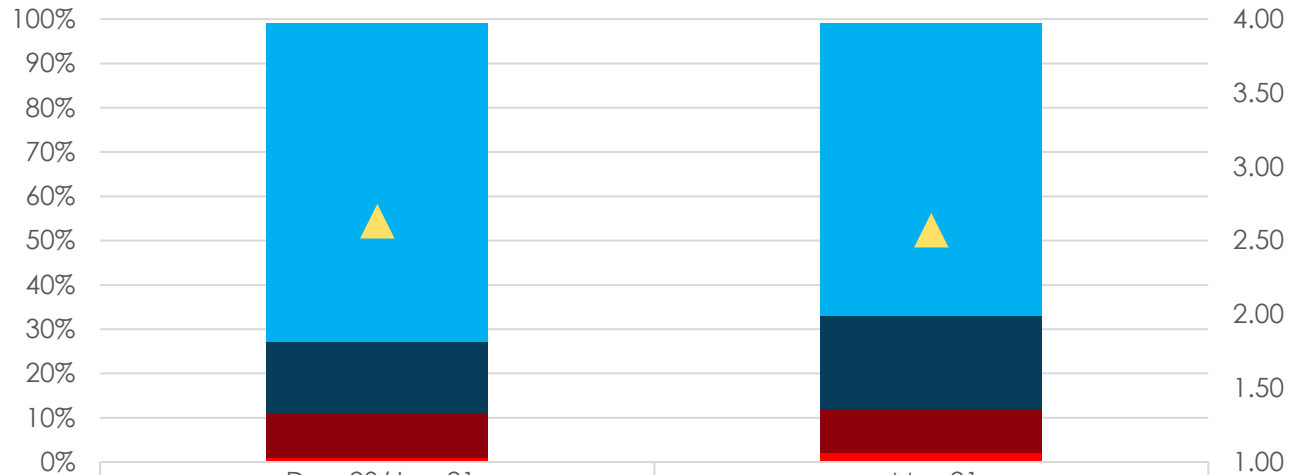


	Dec-20/ Jan-21	Mar-21
Very important (4)	11%	14%
One of several reasons (3)	24%	27%
Very little impact (2)	23%	22%
Had no bearing (1)	41%	36%
BASE	196	228
MEAN	2.05	2.19

PERCEPTION OF COVID-19 IMPACT ON HEALTH – OVERALL

4-pt Rating Scale

The proportion of visitors that view COVID-19 as a serious and urgent health concern (top box) is down.



	Dec-20/Jan-21	Mar-21
■ Serious and urgent (4)	72%	66%
■ Serious but not urgent (3)	16%	21%
■ Concern but no serious (2)	10%	10%
■ Not a concern (1)	1%	2%
BASE	495	515
▲ MEAN	2.63	2.57

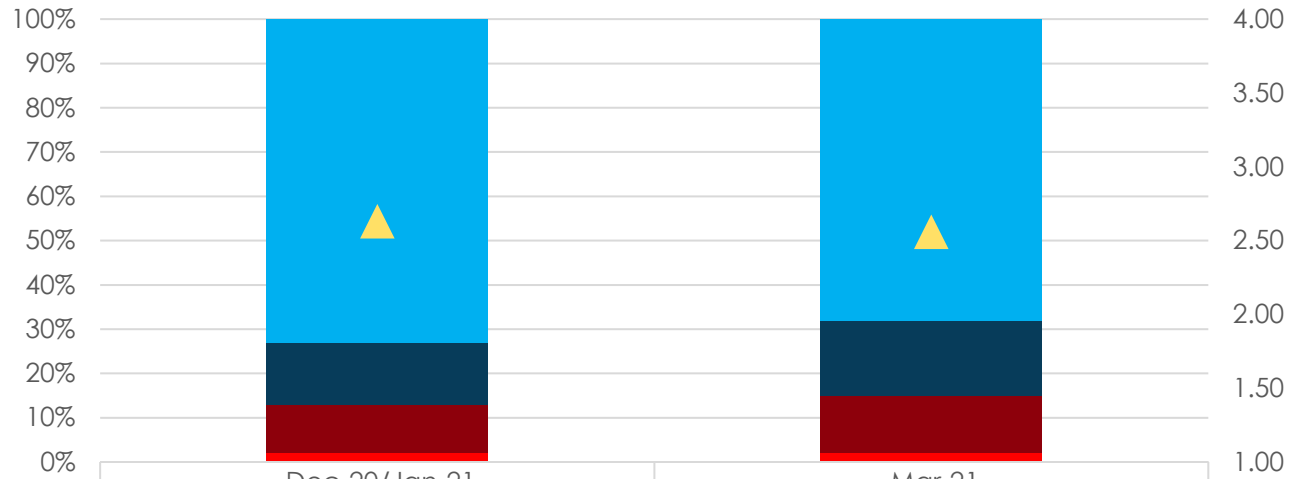
PERCEPTION OF COVID-19 IMPACT ON HEALTH – OVERALL

SEGMENTATION ANALYSIS

- *Female visitors were more likely to view COVID-19 as a serious and urgent threat than were males.*
- *Less affluent visitors feel more threatened by COVID-19.*
- *Among visitors from U.S. West, repeat visitors were more likely to provide a top box (serious and urgent health concern) than were first-time visitors from this travel region.*

PERCEPTION OF COVID-19 IMPACT ON HEALTH – U.S. WEST

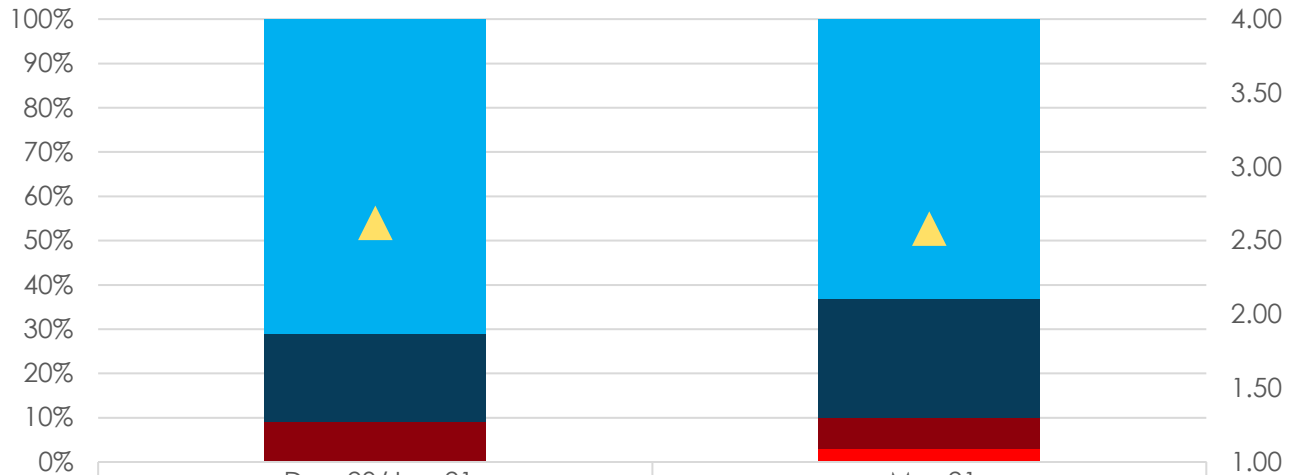
4-pt Rating Scale



	Dec-20/Jan-21	Mar-21
■ Serious and urgent (4)	73%	68%
■ Serious but not urgent (3)	14%	17%
■ Concern but no serious (2)	11%	13%
■ Not a concern (1)	2%	2%
BASE	299	287
▲ MEAN	2.63	2.56

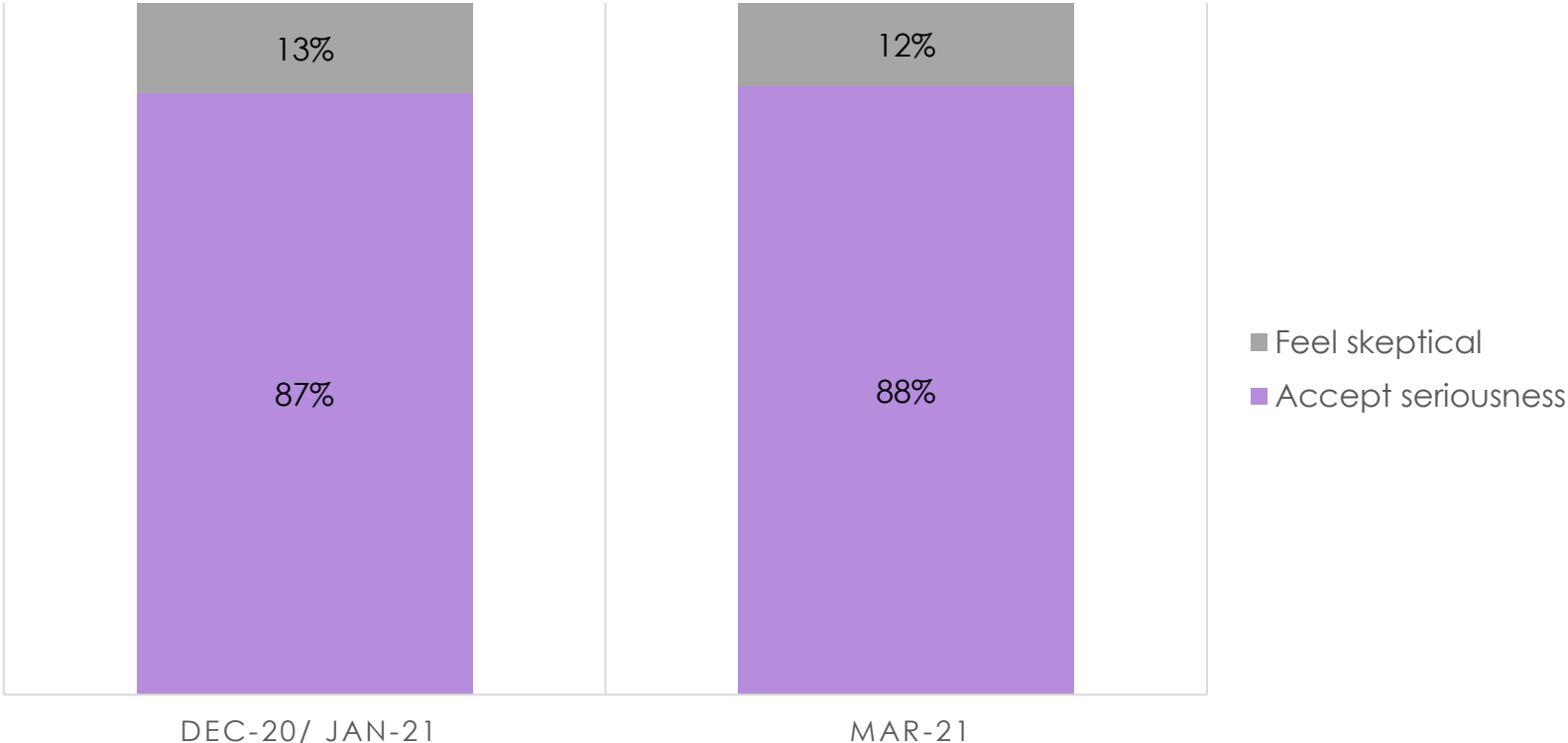
PERCEPTION OF COVID-19 IMPACT ON HEALTH – U.S. EAST

4-pt Rating Scale

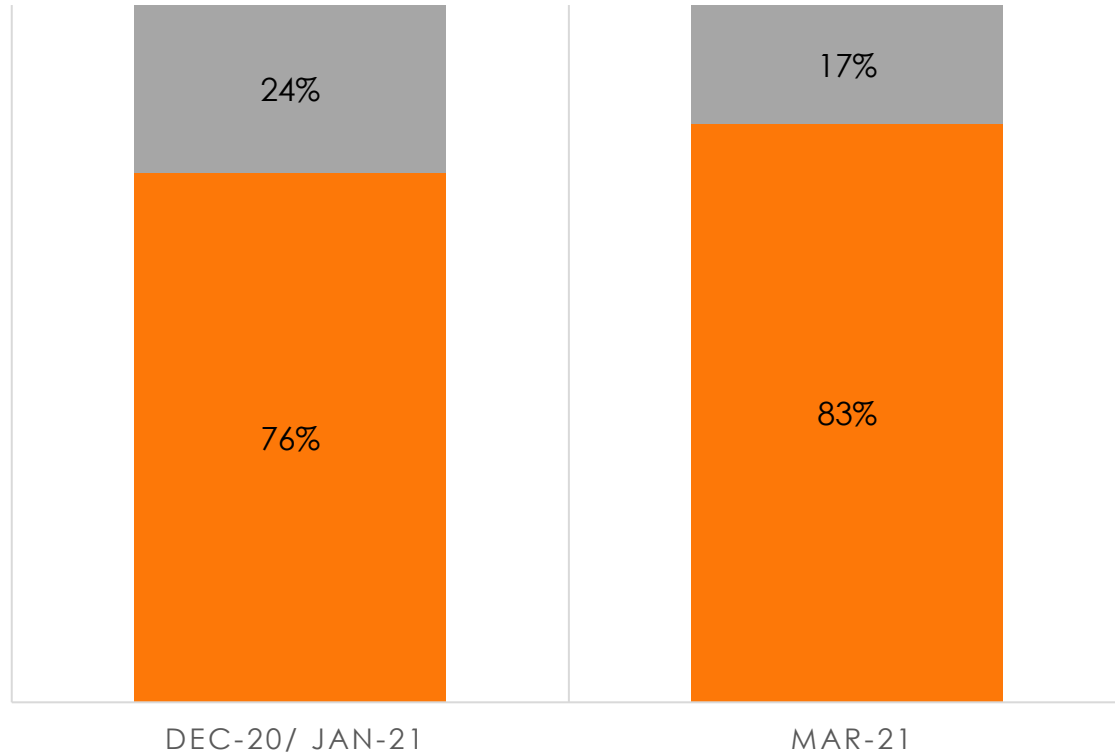


	Dec-20/Jan-21	Mar-21
■ Serious and urgent (4)	71%	64%
■ Serious but not urgent (3)	20%	27%
■ Concern but no serious (2)	9%	7%
■ Not a concern (1)		3%
BASE	196	228
▲ MEAN	2.62	2.58

GOVERNMENT'S POSITION OF SERIOUSNESS OF COVID-19



COVID-19 VACCINE – PENETRATION



The proportion of visitors who intends to get vaccinated has risen this reporting period.

- No
- Intend to get vaccinated

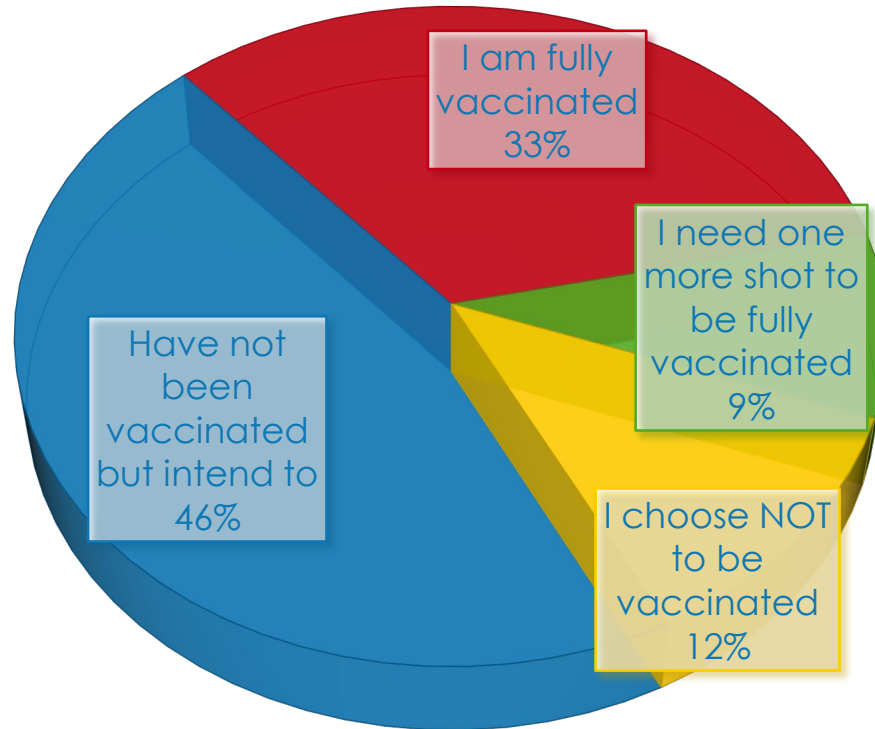
COVID-19 VACCINE

SEGMENTATION ANALYSIS

- *Repeat visitors appear more likely to get vaccinated for COVID-19 compared to first-time visitors.*
- *When segmented by household income we find less affluent travelers less likely to get the vaccine, while more affluent travelers were more likely to get vaccinated.*
- *More educated travelers, or those with a college degree, were more likely to indicate they will get vaccinated when their turn comes.*
- *97% of travelers over the age of 65 say they will get the vaccine.*

COVID-19 VACCINE – STATUS

Most of the visitors who have chosen to travel to the state during the pandemic are likely to take the vaccine.

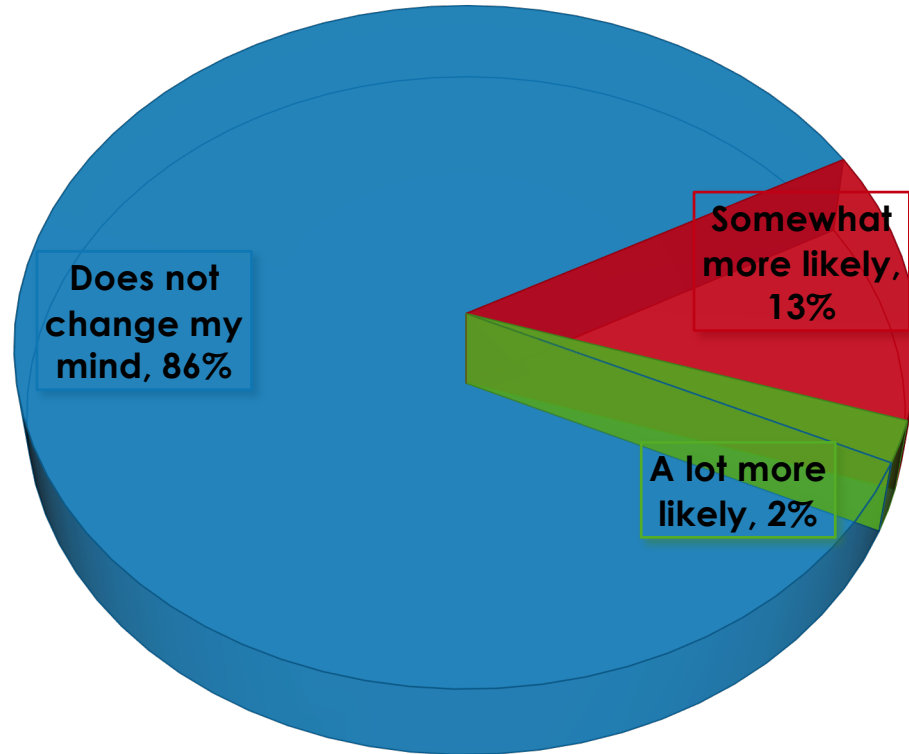


COVID-19 VACCINE – STATUS

SEGMENTATION ANALYSIS

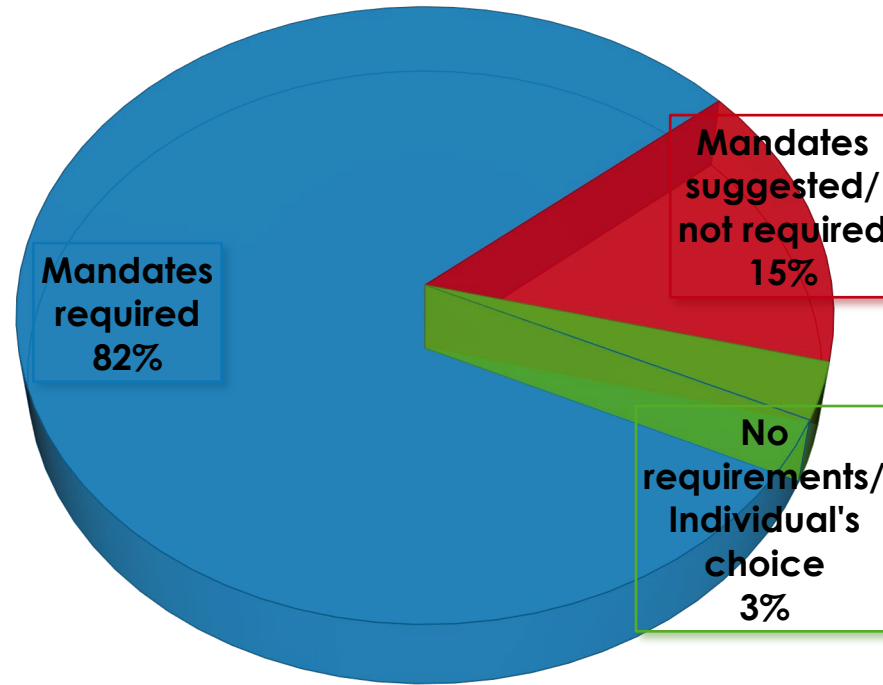
- *Repeat visitors were more likely to be fully vaccinated, while there is a larger proportion among first-time visitors who say they have chosen not to be vaccinated.*
- *The likelihood of already being fully vaccinated is highest amongst more affluent visitors.*
- *College graduates were more likely to have been fully vaccinated, while there is a higher proportion of those who say they will not get vaccinated amongst visitors without a college degree.*

COVID-19 VACCINE – HAWAI'I TRAVEL INCENTIVE

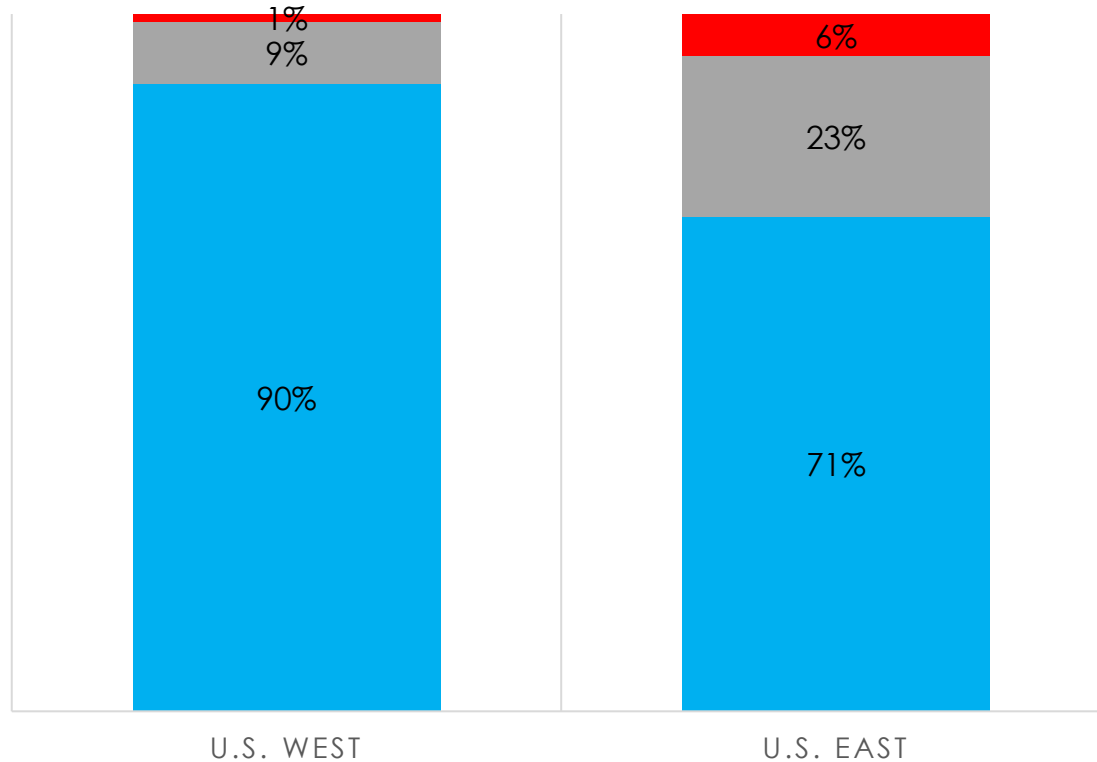


COVID-19 MANDATES AT HOME

Most of the visitors who have chosen to travel to the state during the pandemic live in states where COVID mandates are already required of them.



COVID-19 MANDATES AT HOME

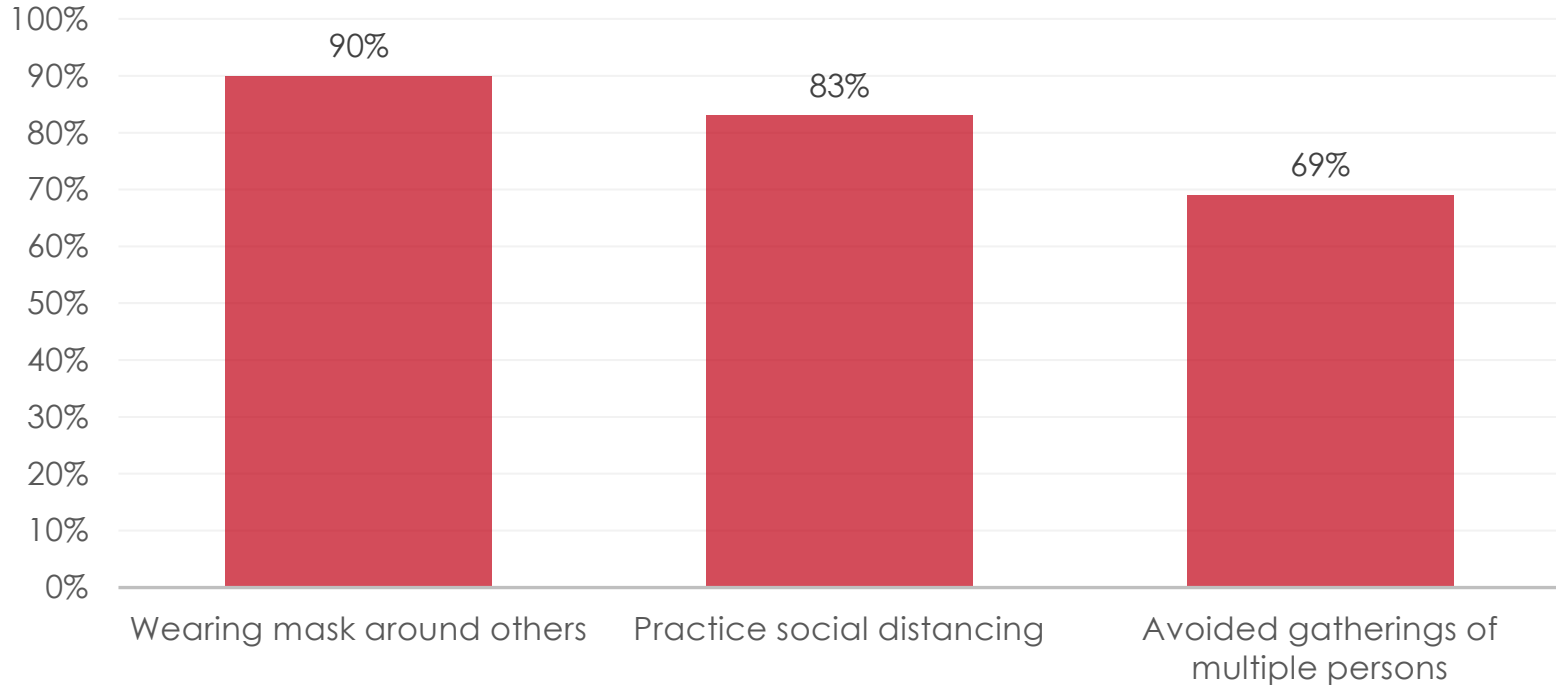


Visitors from U.S. West more likely to live in areas where mandates are required.

- No requirements/ Personal Choice
- Mandates Suggested- Not Required
- Mandates Required

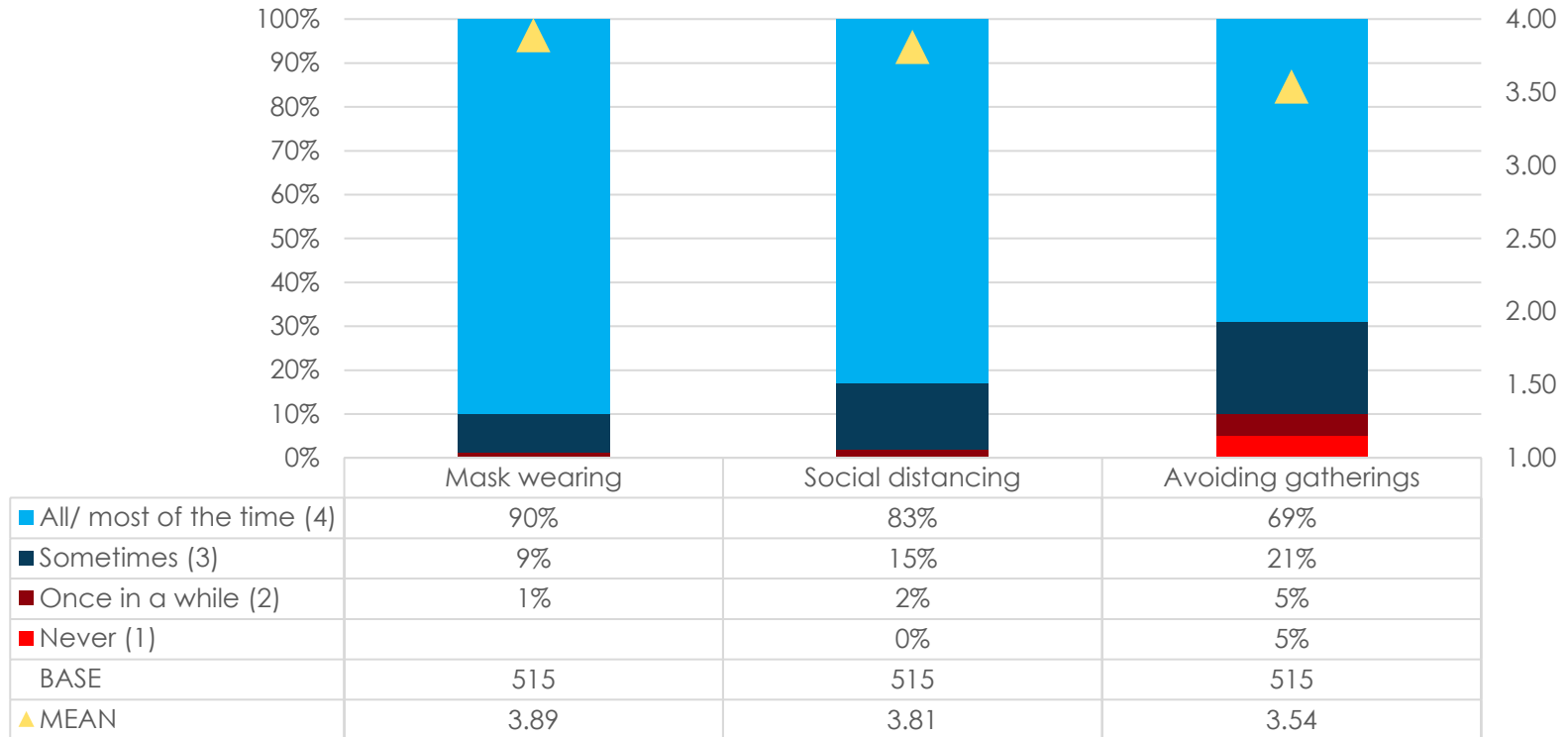
FOLLOWED COVID-19 GUIDELINES WHILE IN HAWAI'I

Adhered to “All The Time” During Trip



FOLLOWED COVID-19 GUIDELINES WHILE IN HAWAI'I

4-pt Rating Scale



SOURCES OF COVID-19 INFORMATION

SOURCES OF HAWAI'I COVID-19 INFORMATION

TOP RESPONSES

	Dec-20/ Jan-21 n=494	Mar-21 n=507	
Safe travels website (travel.Hawaii.gov)	95%	95%	
Friends and family	38%	37%	
GoHawaii.com	34%	27%	↓
Airline staff	17%	20%	
HTA website (hawaiiitourismauthority.org)	20%	14%	↓
Hotel staff	8%	12%	
Social media/ blogs	14%	12%	
Online travel sites	10%	10%	

SOURCES OF HAWAI'I COVID-19 INFORMATION

SEGMENTATION ANALYSIS

- *Visitors from U.S. West were more reliant on friends and family for information, while U.S. East visitors were more likely to use GoHawaii.com.*
- *When segmented by gender we also find that females were more likely to rely once again on friends and family and GoHawaii.com*

RESPONDENT PROFILE

RESPONDENT PROFILE

	Overall
GENDER	
Male	40%
Female	60%
HOUSEHOLD INCOME	
< \$40,000	4%
\$40,000 to \$59,999	5%
\$60,000 to \$79,999	9%
\$80,000 to \$99,999	9%
\$100,000 to \$124,999	10%
\$125,000 to \$149,999	7%
\$150,000 to \$174,999	8%
\$175,000 to \$199,999	6%
\$200,000 to \$249,999	9%
\$250,000 +	18%
Refused	13%
EDUCATION	
Post-graduate	33%
College graduate	36%
Some college	13%
Associates degree	10%
Vocational	2%
High school	3%

	Overall
AGE	
18-34	26%
35-49	29%
50-64	28%
65+	17%
MEAN	47.15
MEDIAN	46
TRIPS TO HAWAI'I	
First-time	25%
Repeat	75%
ISLANDS VISITED	
O'ahu	54%
Island of Hawai'i	6%
Maui	48%
Kaua'i	6%
Lana'i	1%
Moloka'i	1%
ISLANDS VISITED	
Single island	88%
Multi-island trip	12%

	Overall
ACCOMMODATIONS	
Hotel/ villa/ resort	42%
Condo/ apartment	23%
Timeshare	14%
Friends/ family	12%

Mahalo!

Questions?