

# VISITOR COVID-19 STUDY

June 2021

Prepared for:  
Hawai'i Tourism Authority

# RESEARCH METHODOLOGY

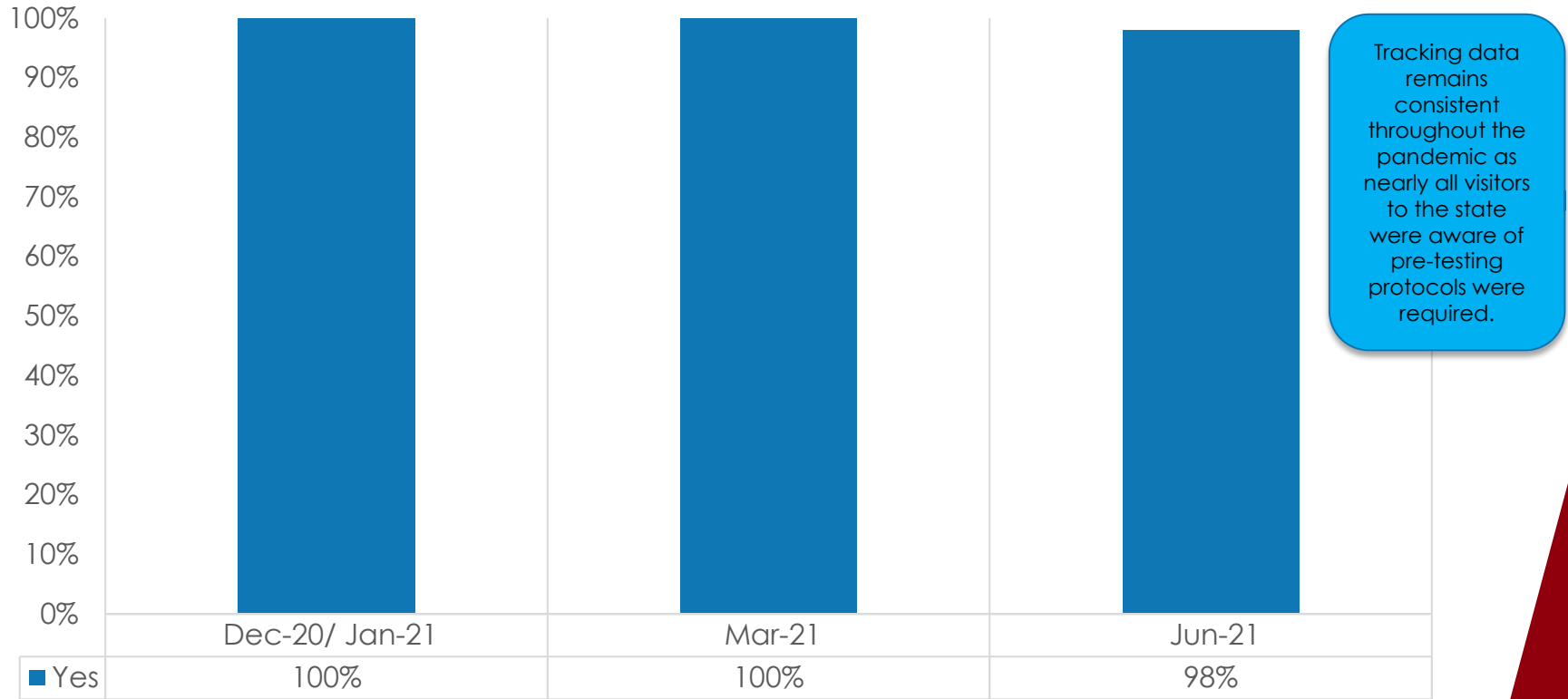
- Online survey conducted June 2, 2021 – June 8, 2021, among visitors to Hawai'i from U.S. Mainland.
  - U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming)
  - U.S. East (all other states in the Continental U.S.)
  - All respondents visited Hawai'i from May 15 – 24, 2021.

MMA	Completed	Margin of Error $\pm$	Response Rate
<b>U.S. West</b>	263	6.04	13.3%
<b>U.S. East</b>	235	6.39	12.2%
<b>TOTAL</b>	498	4.39	12.7%

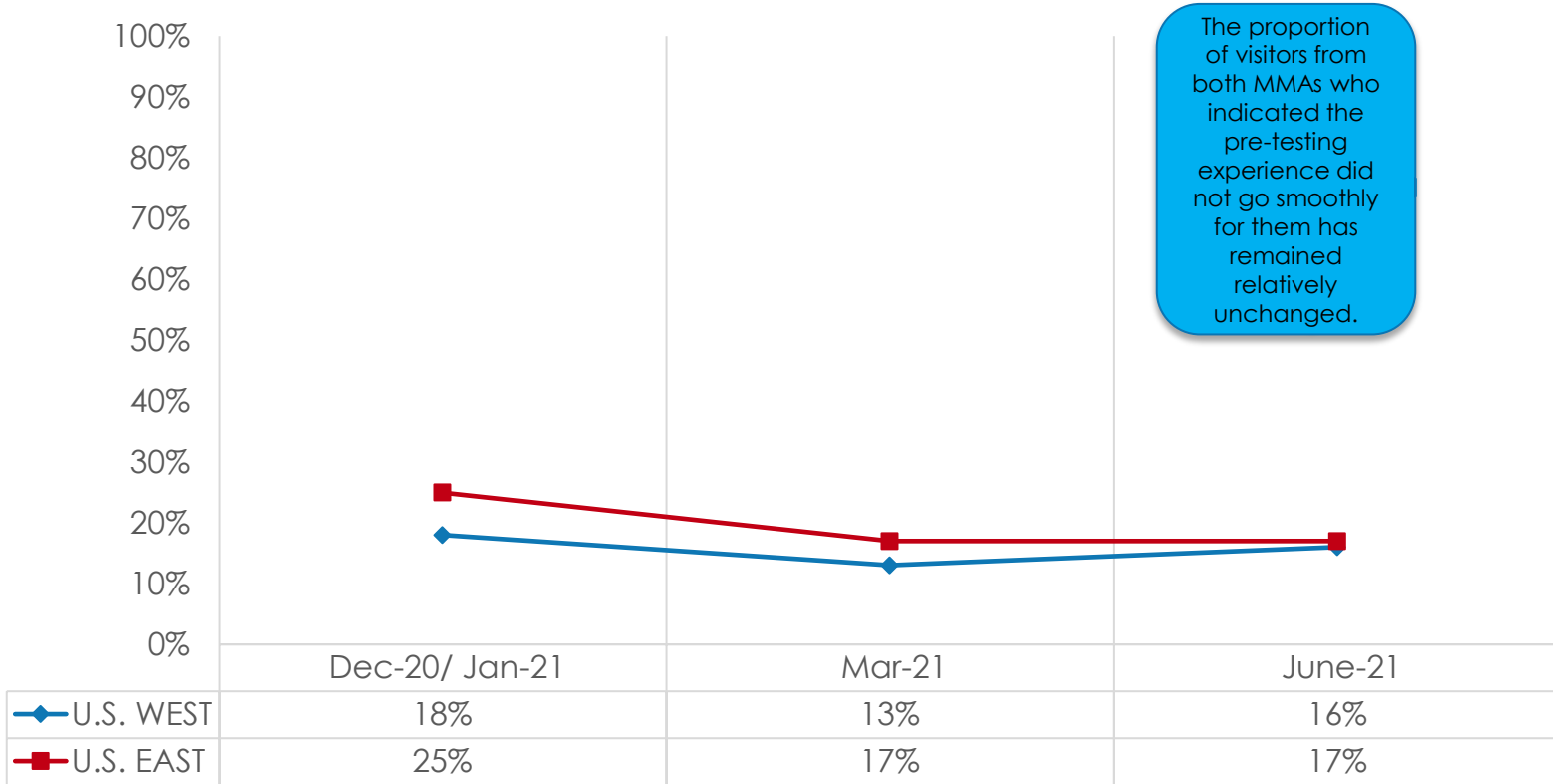
\*Margins of error are presented at the 95 percent level of confidence

# PRE-ARRIVAL TESTING PROTOCOLS

# PRE-ARRIVAL UNDERSTANDING OF TESTING PROTOCOLS



# PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES BY MMA



# PRE-ARRIVAL COVID-19 TESTING DIFFICULTIES

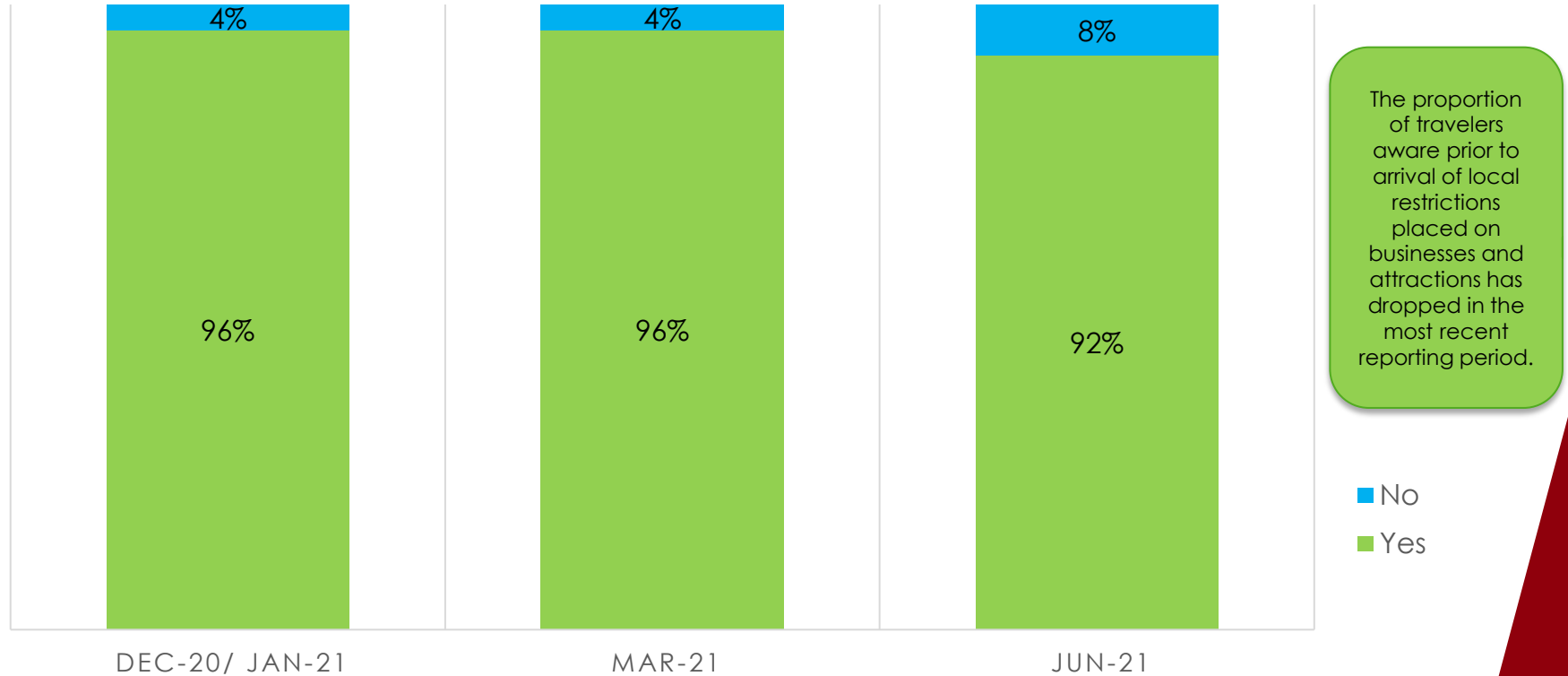
## TOP RESPONSES GIVEN

	Dec 20/ Jan 21	Mar 21	Jun 21
BASE	103	76	82
Problems with Hawai'i Travels website	9%	17%	29%
High cost of testing	8%	24%	23%
Issues with trusted partner	18%	5%	21%
Confusion re: type of test required	-	-	20%
72-hour window for test results unreasonable	46%	51%	12%
No tests available for already vaccinated travelers	-	-	12%
Difficult to find/ access trusted partners	37%	28%	10%
Test results did not arrive in time	15%	18%	9%

The proportion of visitors in this subset of the sample having issues with the Hawai'i Travels website is increasing.

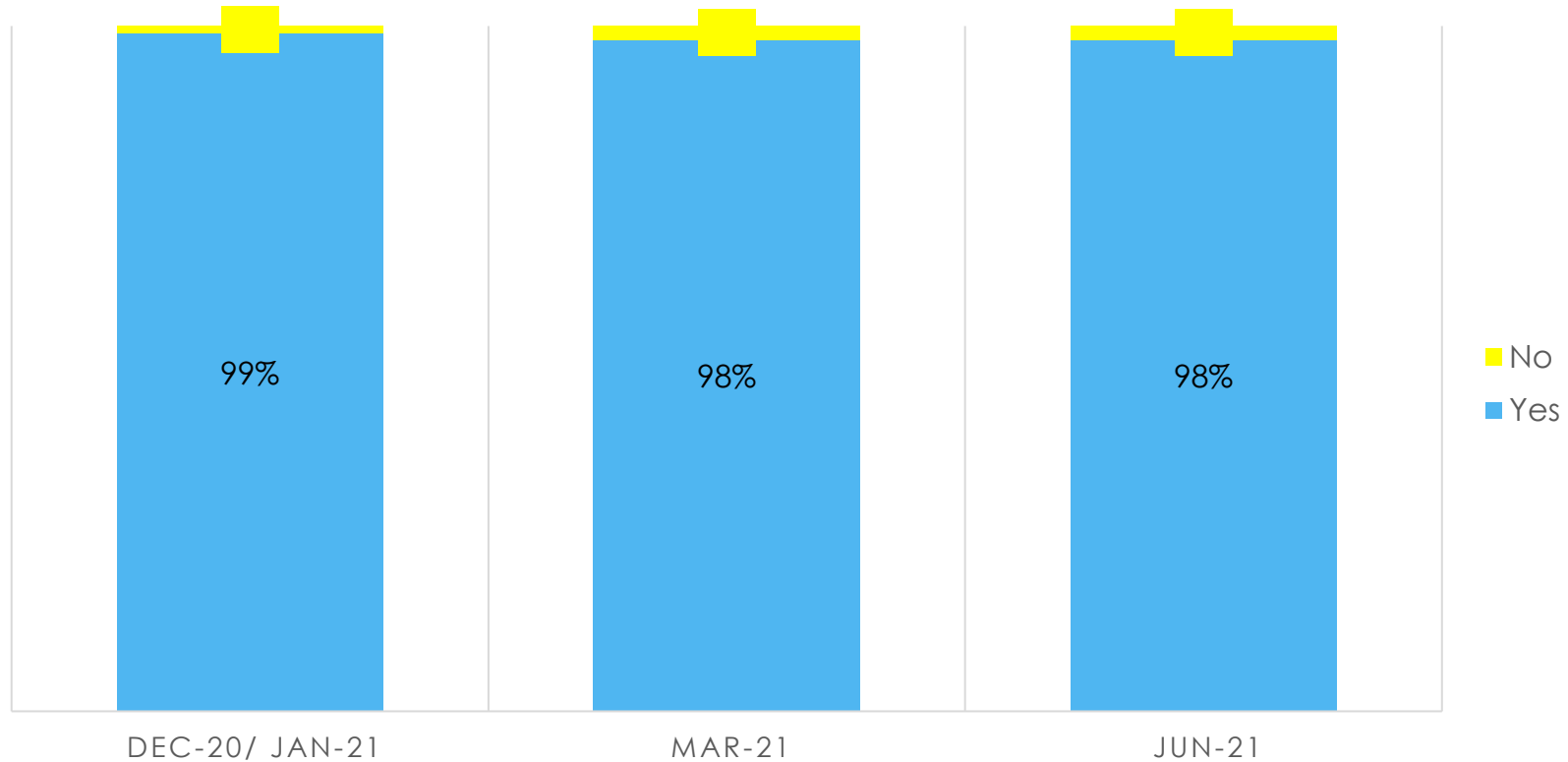
# PRE-ARRIVAL EXPECTATIONS/ FAMILIARITY WITH COVID PROTOCOLS

# AWARE OF LIMITED TOURISM AMENITIES





# AWARE OF LOCAL GOVERNMENT MANDATES

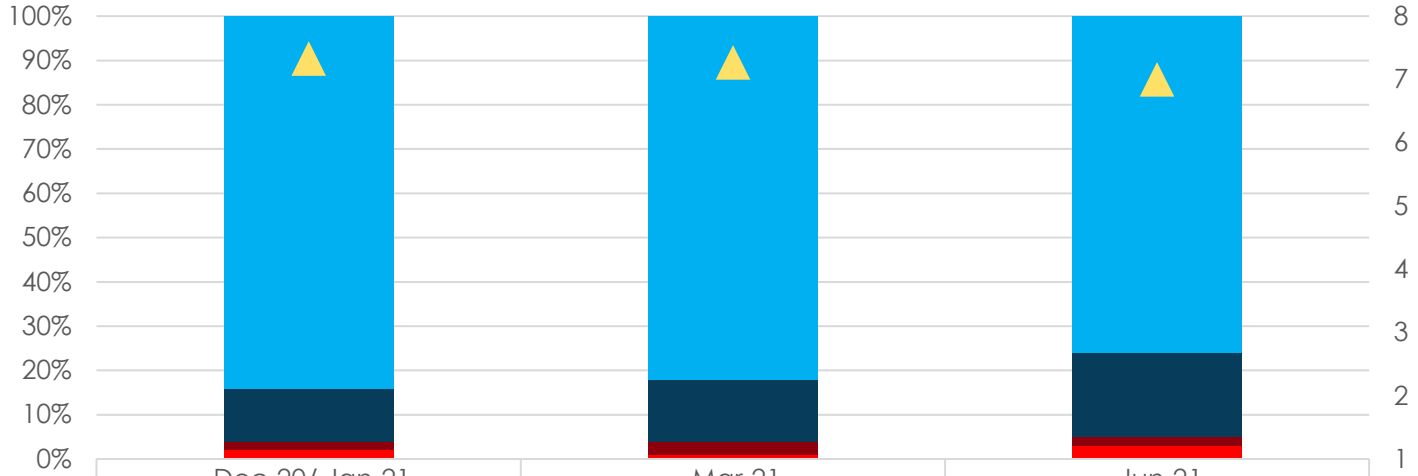


# VISITOR SATISFACTION

# VISITOR SATISFACTION – Tracking

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

Overall visitor satisfaction during the pandemic is trending downward as more arrive in the islands.



	Dec-20/ Jan-21	Mar-21	Jun-21
■ Excellent (7-8)	85%	82%	76%
■ Above Avg (5-6)	12%	14%	19%
■ Below Avg (3-4)	2%	3%	2%
■ Terrible (1-2)	2%	1%	3%
BASE	495	515	498
▲ MEAN	7.33	7.27	7.00

# VISITOR SATISFACTION – OVERALL

## SEGMENTATION ANALYSIS

- *Visitors with household income above \$100k were less satisfied with their trip compared to those living in households with combined incomes below \$100K.*
- *Those who visited a single island were more satisfied with their trip overall compared to those who visited multiple islands during their most recent trip.*

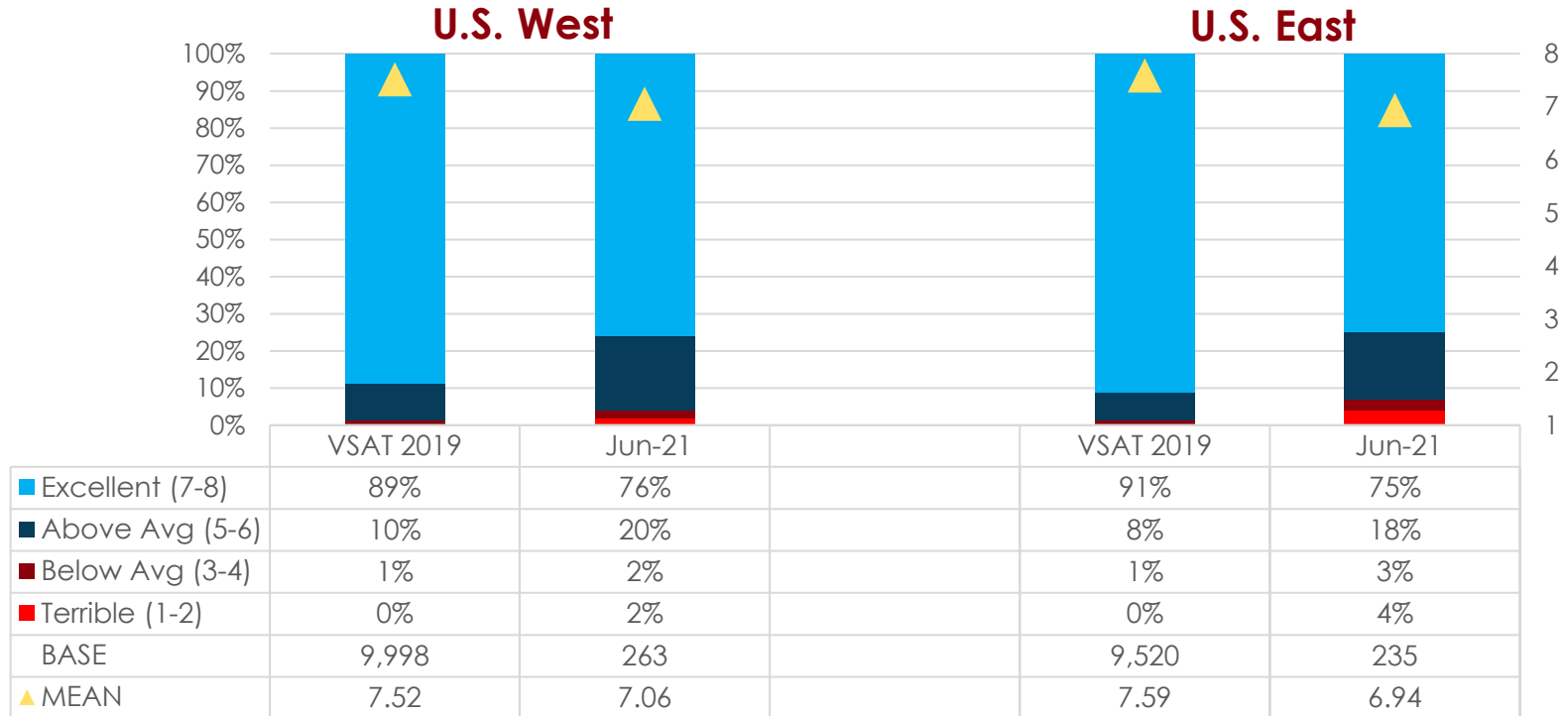
# AREAS OF OPPORTUNITY

## TOP RESPONSES GIVEN

	Dec-20/ Jan-21 n=75	Mar-21 n=93	Jun-21 n=122
Limited Capacity/ Availability – restaurants/ attractions	-	-	30%
COVID mandates/ rules are confusing	27%	34%	17%
Too crowded	-	-	17%
Fewer COVID restrictions	-	23%	15%
Difficult to get tested when already vaccinated	-	-	12%
Lack of rental cars/transportation alternatives	-	-	11%
Difficult to get reservations for activities/ restaurants	-	-	10%
Had to quarantine	12%	3%	2%
Open businesses/ attractions/ beaches	39%	33%	1%

# VISITOR SATISFACTION – June 2021 vs. 2019

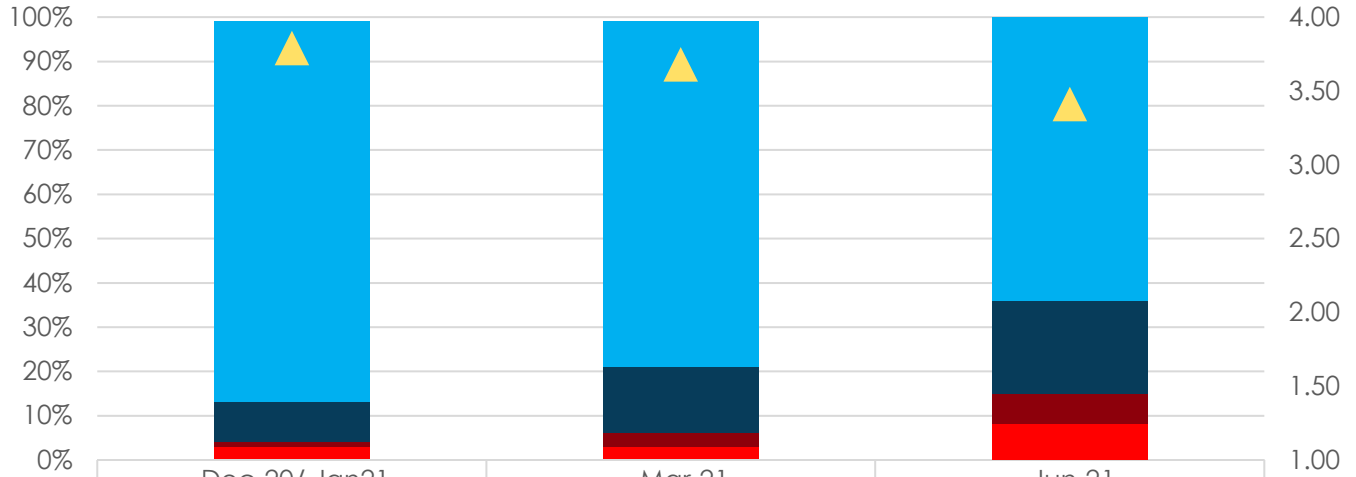
8-pt Rating Scale  
8=Excellent / 1=Terrible



# BRAND ADVOCACY – NEXT SIX MONTHS

## Tracking

Brand advocacy is trending downward as more visitors arrive in the islands.



	Dec-20/ Jan21	Mar-21	Jun-21
Very likely (4)	86%	78%	64%
Somewhat likely (3)	9%	15%	21%
Somewhat unlikely (2)	1%	3%	7%
Very unlikely (1)	3%	3%	8%
BASE	495	515	498
MEAN	3.79	3.68	3.41

# BRAND ADVOCACY – NEXT SIX MONTHS

## SEGMENTATION ANALYSIS

- *Younger travelers in the 18-34 age group express a higher likelihood of recommending visiting the state in the next six months.*
- *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.*



# REASONS FOR NOT RECOMMENDING HAWAII

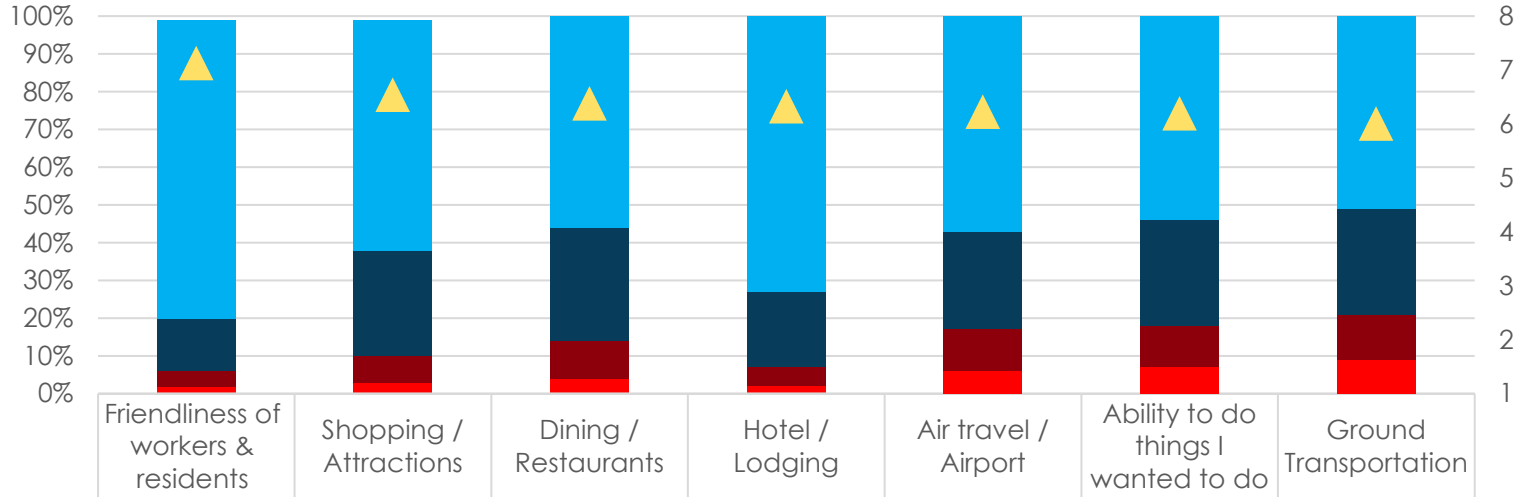
## TOP RESPONSES GIVEN

Caution  
small  
base

	Dec-20/Jan-21 n=21	Mar-21 n=40	Jun-21 n=75
Wait for end of pandemic/ travel restrictions	-	-	20%
Travel is too difficult/ hassle at this time	-	-	19%
COVID-19 testing requirements are unreasonable	57%	15%	15%
Closures of businesses, attractions, natural landmarks	14%	33%	13%
Too expensive	-	15%	11%
Added expenses/ time traveling now	19%	-	8%

# VISITOR SATISFACTION – Experience Components

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



■ Excellent (7-8)	79%	61%	56%	73%	57%	54%	51%
■ Above Avg (5-6)	14%	28%	30%	20%	26%	28%	28%
■ Below Avg (3-4)	4%	7%	10%	5%	11%	11%	12%
■ Terrible (1-2)	2%	3%	4%	2%	6%	7%	9%
BASE	498	498	498	498	498	498	498
▲ MEAN	7.13	6.54	6.38	6.33	6.23	6.20	6.01

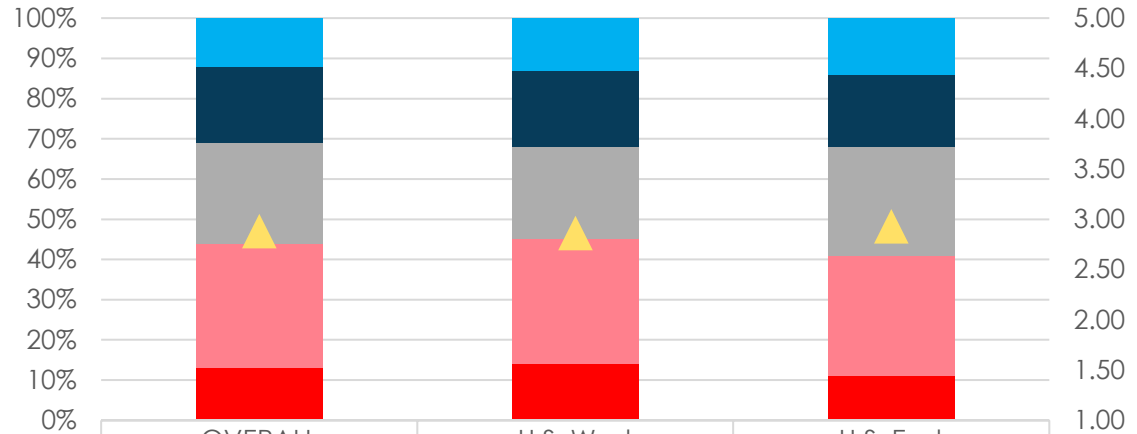
# REPEAT VISITORS

# REPEAT VISITOR – DIRECT COMPARISON

## Pre-pandemic vs. Pandemic Travel Experience

5-pt Rating Scale

44% of repeat visitors who have traveled to the state pre-pandemic indicate their current trip is less satisfying by comparison.



	OVERALL	U.S. West	U.S. East
■ Pandemic trip a lot more enjoyable (5)	13%	13%	14%
■ Somewhat more enjoyable (4)	19%	19%	18%
■ No Difference (3)	25%	23%	27%
■ Somewhat less (2)	31%	31%	30%
■ Much less enjoyable (1)	13%	14%	11%
BASE	275	173	102
▲ MEAN	2.88	2.86	2.93

# PANDEMIC TRAVEL TO HAWAI'I LESS SATISFYING COMPARED TO PRIOR TRIP PRE-PANDEMIC

Reasons for less enjoyable experience

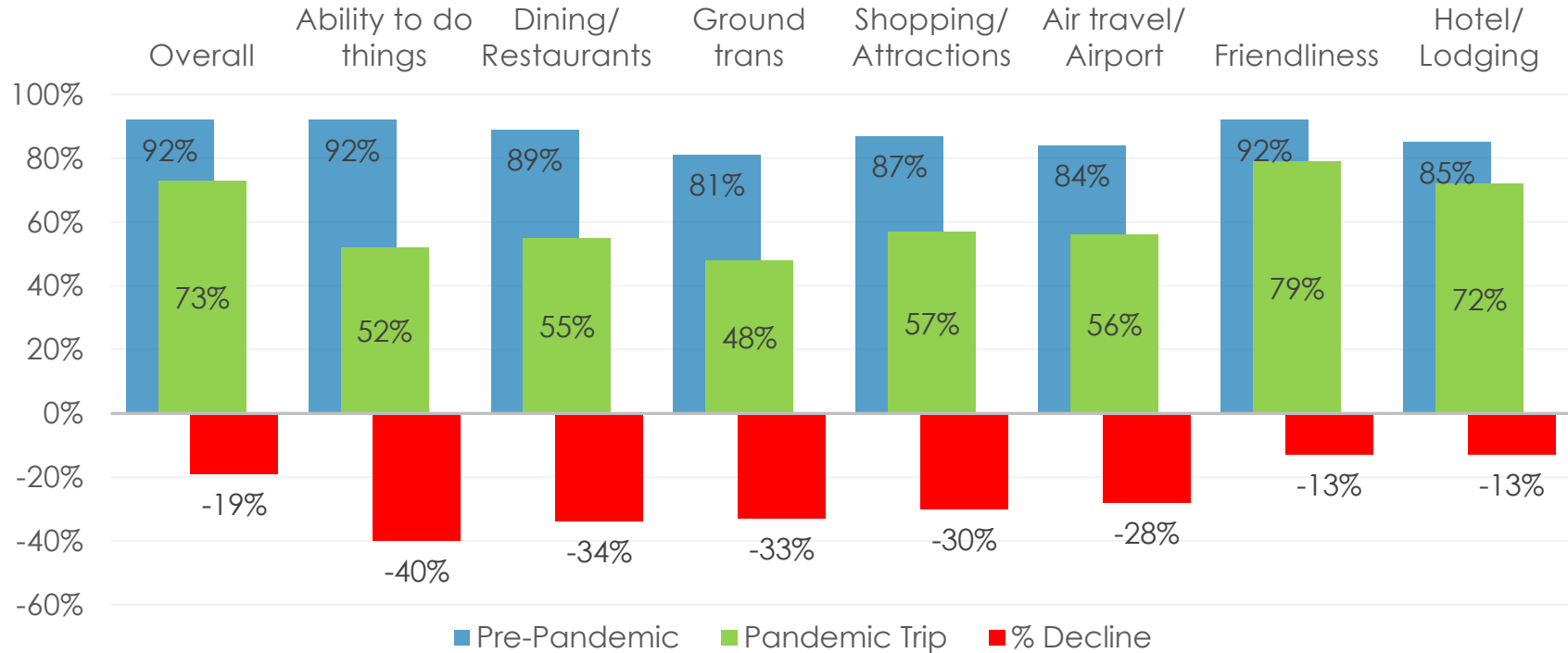


	OVERALL n=120	U.S. West n=78	U.S. East n=42
Limited availability/ capacity – restaurants, attractions, lodging, etc.	24%	29%	14%
Too many COVID restrictions	22%	18%	29%
Rental car availability/ cost	16%	19%	10%
Too crowded- lines/ wait times	13%	13%	12%
Need COVID test results	11%	12%	10%
Didn't get to do everything I wanted to	10%	9%	12%
Difficult to get reservations	8%	8%	10%

# REPEAT VISITOR SATISFACTION – Experience Components

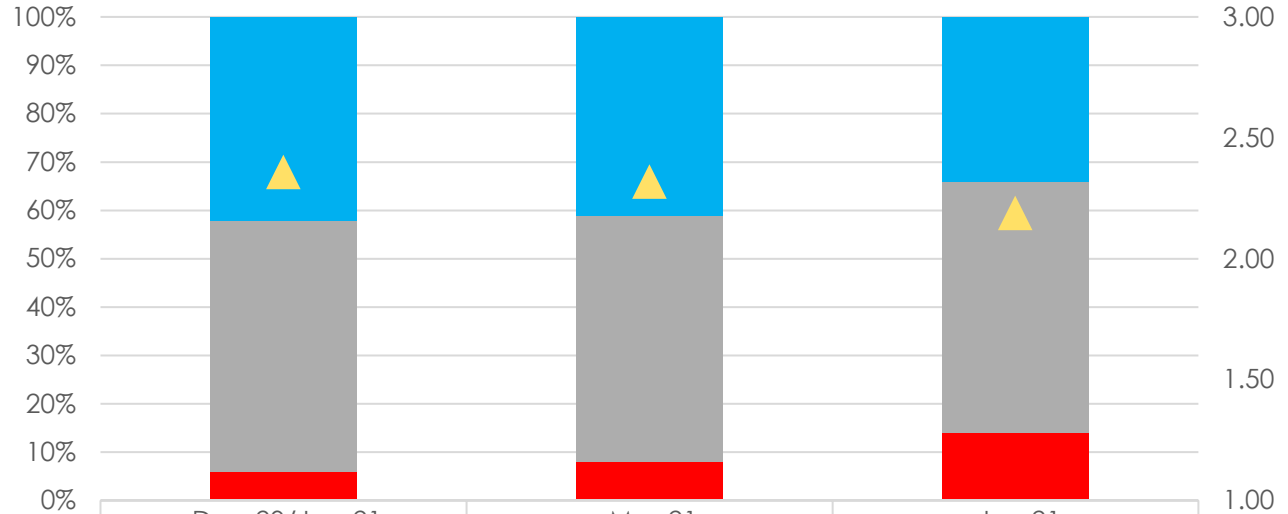
## Pre-Pandemic vs. Current Trip

### Top Box (Excellent 7-8)



# EXPECTATIONS

# TRIP EXPECTATIONS



	Dec-20/Jan-21	Mar-21	Jun-21
■ Exceeded expectations (3)	42%	41%	34%
■ Met expectations (2)	52%	51%	52%
■ Left disappointed (1)	6%	8%	14%
BASE	495	515	498
▲ MEAN	2.36	2.32	2.19



# TRIP EXPECTATIONS

## SEGMENTATION ANALYSIS

- *First-time visitors were more likely to feel this trip exceeded their expectations compared to repeat visitors.*
- *The likelihood a visitor felt their trip met their expectations is highest among younger travelers under the age of 35 and declines with age.*
- *More affluent visitors (those who live in homes with combined incomes above \$100K) were less likely to agree that their trip met their expectations.*

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?

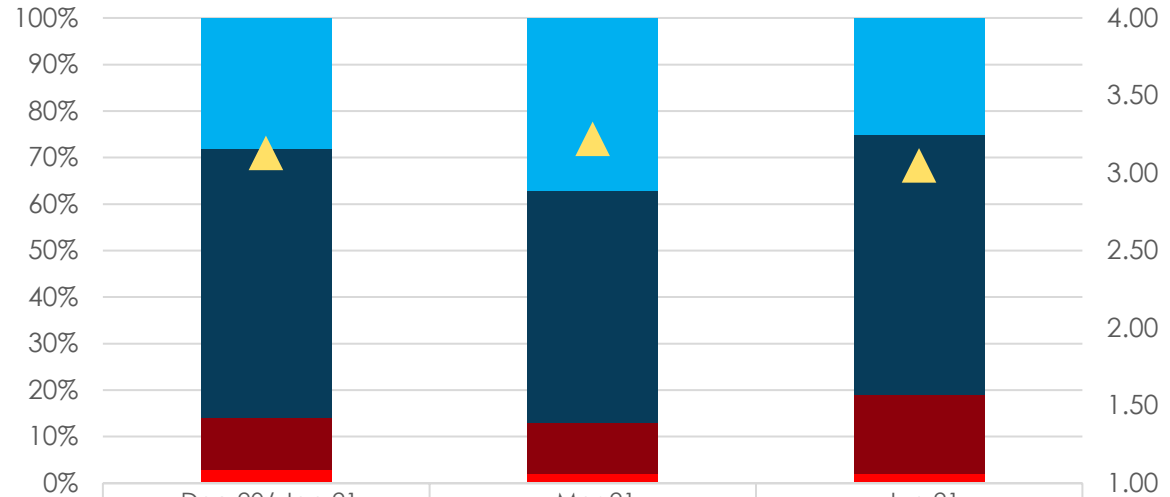
# TRIP EXPECTATIONS – REASONS FOR DISAPPOINTMENT



	<b>Dec-20/ Jan-21 n=31</b>	<b>Mar-21 n=43</b>	<b>Jun-21 n=72</b>
<b>Difficult to get reservations – restaurants/ attractions</b>	-	-	15%
<b>Mask wearing/ restrictions</b>	-	-	15%
<b>Closure of businesses/ attractions</b>	26%	33%	14%
<b>Quarantine/ testing requirements</b>	42%	14%	14%
<b>Difficult to get tested after being vaccinated</b>	-	-	11%
<b>Lack of rental cars/ expensive</b>	-	-	10%
<b>Too crowded</b>	-	-	10%
<b>Too expensive</b>	-	-	8%

# PLANNED ACTIVITY / ATTRACTION PARTICIPATION

As more visitors arrive and expectations increase, we find fewer visitors indicating they did all of the activities that they had planned for.



	Dec-20/ Jan-21	Mar-21	Jun-21
■ Did all of our planned activities (4)	29%	37%	26%
■ Did most of our planned activities (3)	58%	50%	56%
■ Did a few planned activities (2)	11%	11%	17%
■ Not able to do any planned activities (1)	3%	2%	2%
BASE	495	515	498
▲ MEAN	3.13	3.22	3.05

# OBSTACLES TO PLANNED ACTIVITY / ATTRACTION PARTICIPATION

Among those who only did few or none of things planned

	<b>Dec-20/ Jan-21 n=65</b>	<b>Mar-21 n=67</b>	<b>Jun-21 n=93</b>
<b>Difficult to get reservations – restaurants/ attractions</b>	-	-	52%
<b>Lack of rental cars/expensive</b>	-	-	18%
<b>Closures of businesses/ attractions</b>	51%	45%	14%
<b>Capacity limits – attractions/ businesses</b>	-	16%	9%
<b>Businesses closing early/ limited hours</b>	-	-	8%

# LIKELIHOOD OF RETURN TRIP TO HAWAI'I

## Taking COVID-19 Into Consideration

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	n=498
I will visit again when I want to regardless of the pre-visit requirements	<b>56%</b>
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	<b>23%</b>
I will visit again when there is no quarantine and no pre-visit coronavirus tested required	<b>11%</b>
I have no plans to return at this time to ever return to Hawai'i	<b>10%</b>

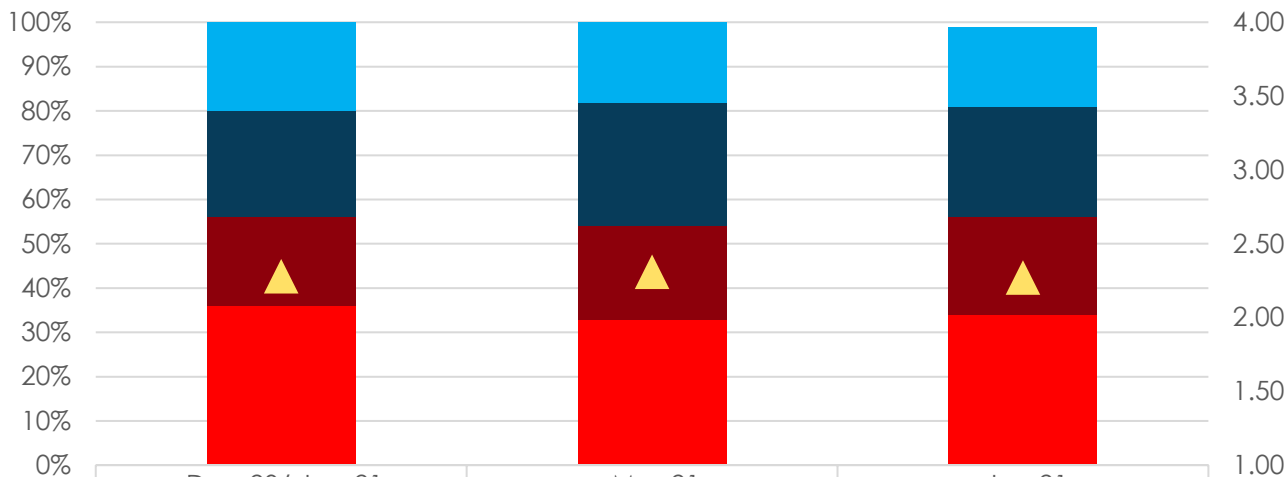
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# COVID-19

# 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 U.S. West visitors.

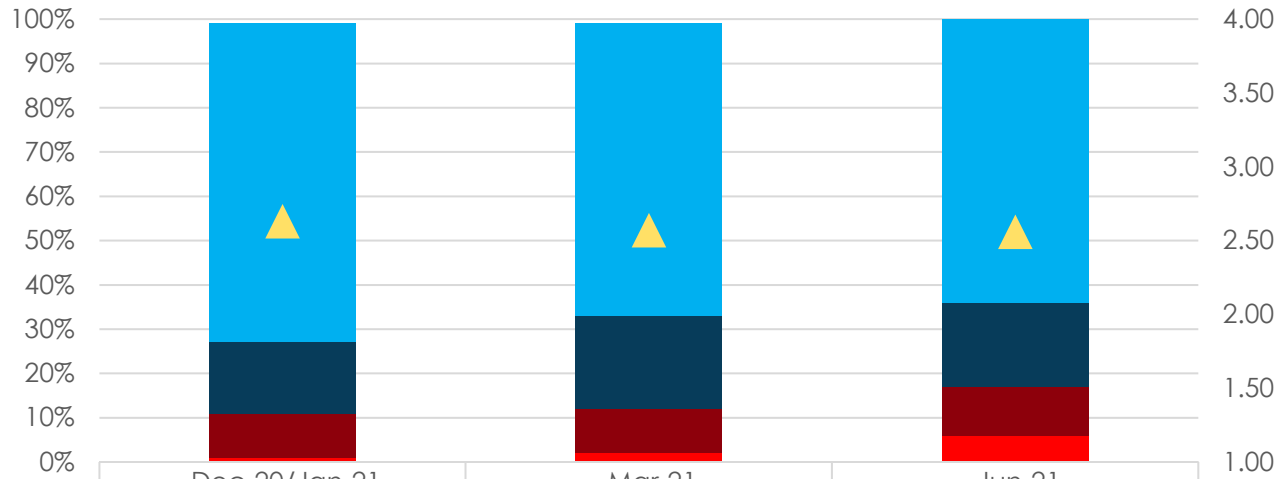


	Dec-20/ Jan-21	Mar-21	Jun-21
Very important (4)	20%	18%	18%
One of several reasons (3)	24%	28%	25%
Very little impact (2)	20%	21%	22%
Had no bearing (1)	36%	33%	34%
BASE	495	515	498
MEAN	2.28	2.31	2.27



# PERCEPTION OF COVID-19 IMPACT ON HEALTH

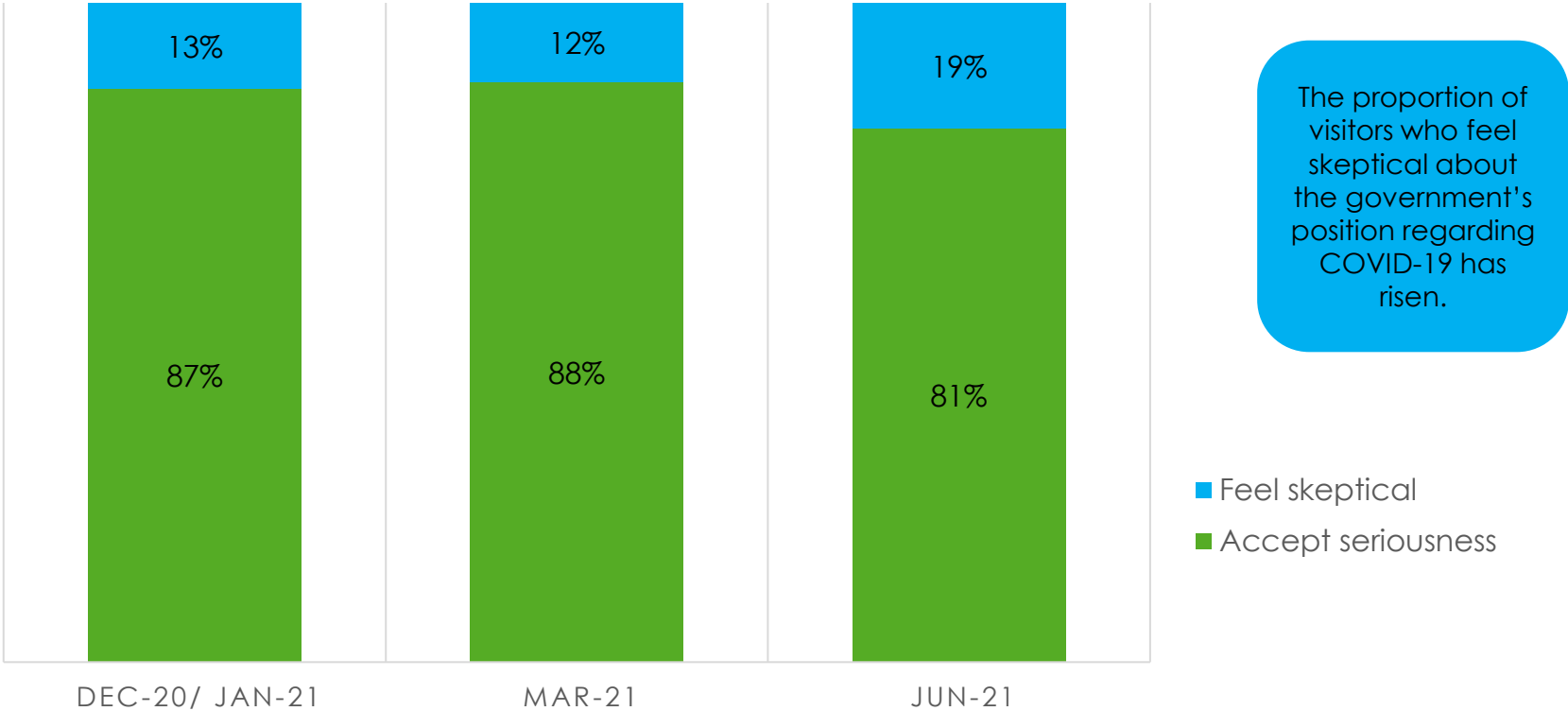
4-pt Rating Scale



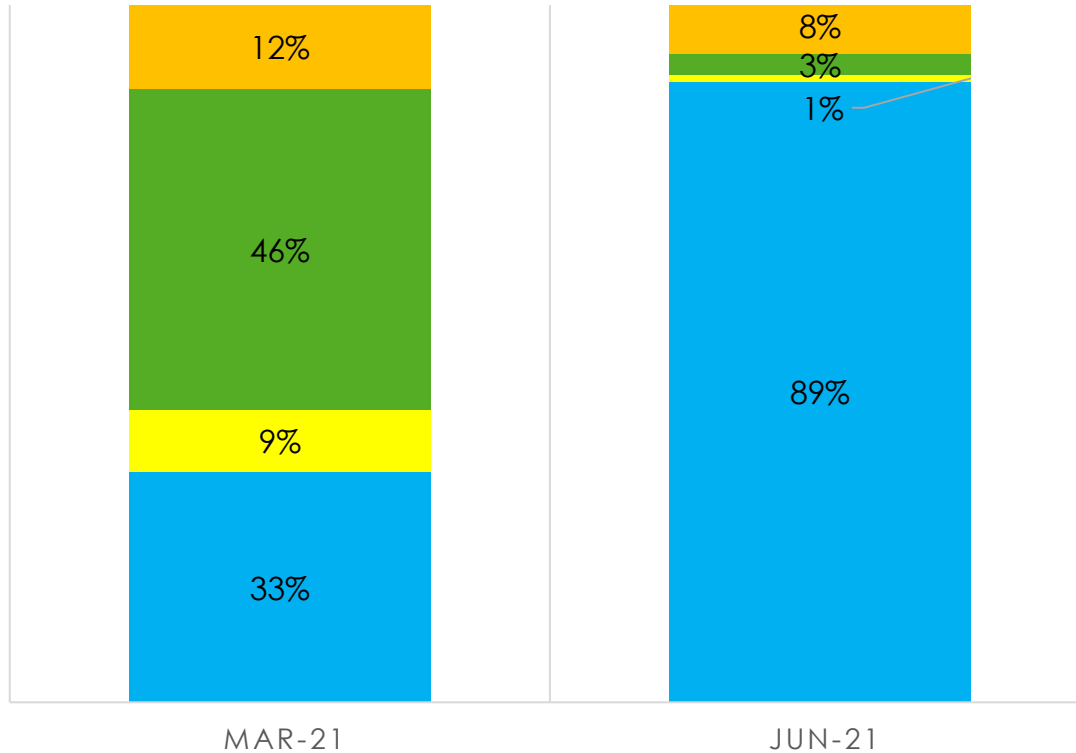
	Dec-20/Jan-21	Mar-21	Jun-21
■ Serious and urgent (4)	72%	66%	64%
■ Serious but not urgent (3)	16%	21%	19%
■ Concern but not serious (2)	10%	10%	11%
■ Not a concern (1)	1%	2%	6%
BASE	495	515	498
▲ MEAN	2.63	2.57	2.56



# GOVERNMENT'S POSITION OF SERIOUSNESS OF COVID-19



# COVID-19 VACCINATION – STATUS



Nearly all of the visitors polled in the current study are fully vaccinated.

- Will not get vaccinated
- Planning to get vaccinated
- Need 1 more shot
- Fully vaccinated

# COVID-19 VACCINE – STATUS

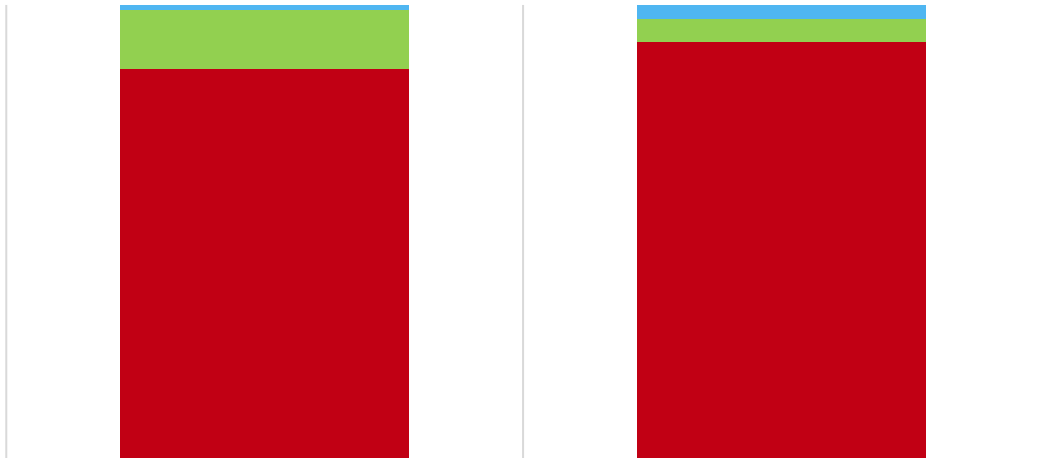
## SEGMENTATION ANALYSIS

- *Repeat visitors were more likely to be fully vaccinated.*
- *Those visitors who live in homes with combined incomes above \$100K were more likely to be vaccinated compared to less affluent travelers.*
- *College graduates were more likely to have been fully vaccinated.*

# COVID-19 VACCINE – HAWAI'I TRAVEL INCENTIVE

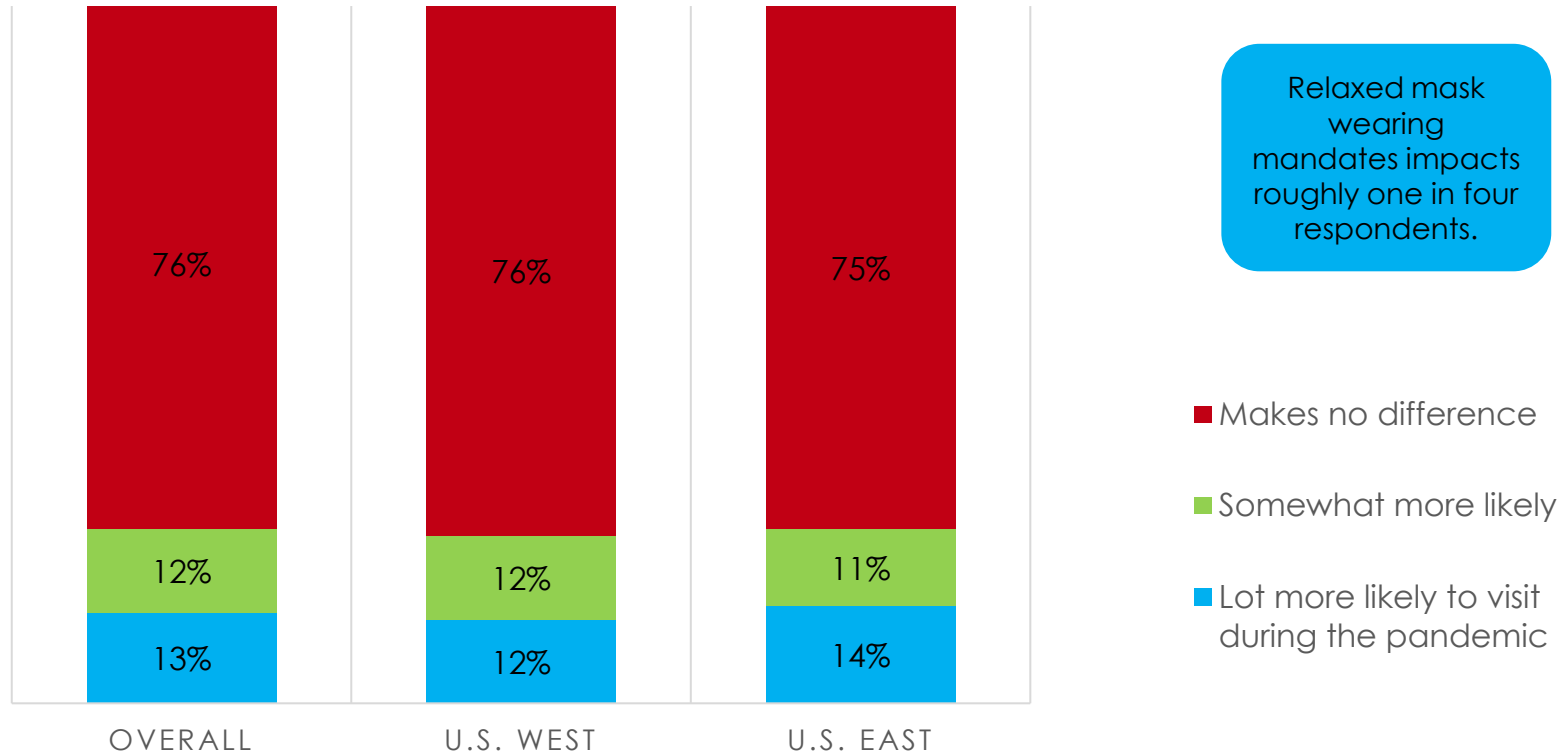
## Among those who say they choose not to be vaccinated

Caution  
small  
base



	Mar-21	Jun-21
■ A lot more likely to get vaccine	2%	3%
■ Somewhat more likely	13%	5%
■ Does not change my mind about the vaccine	86%	92%
BASE	64	39

# IMPACT OF CHANGES IN MASK WEARING GUIDELINES



# SOURCES OF HAWAI'I COVID-19 INFORMATION

## TOP RESPONSES

	<b>Dec-20/ Jan-21 n=494</b>	<b>Mar-21 n=507</b>	<b>Jun-21 n=492</b>
<b>Safe travels website (travel.Hawaii.gov)</b>	95%	95%	93%
<b>Friends and family</b>	38%	37%	38%
<b>GoHawaii.com</b>	34%	27%	28%
<b>Social media/ blogs</b>	14%	12%	14%
<b>Airline staff</b>	17%	20%	13%
<b>HTA website (hawaiiitourismauthority.org)</b>	20%	14%	13%
<b>Online travel sites</b>	10%	10%	11%
<b>Hotel staff</b>	8%	12%	9%

# RESPONDENT PROFILE

# RESPONDENT PROFILE

	Overall
<b>GENDER</b>	
Male	38%
Female	62%
<b>HOUSEHOLD INCOME</b>	
< \$40,000	5%
\$40,000 to \$59,999	6%
\$60,000 to \$79,999	8%
\$80,000 to \$99,999	9%
\$100,000 to \$124,999	13%
\$125,000 to \$149,999	7%
\$150,000 to \$174,999	7%
\$175,000 to \$199,999	7%
\$200,000 to \$249,999	8%
\$250,000 +	16%
Refused	16%
<b>EDUCATION</b>	
Post-graduate	36%
College graduate	36%
Some college	10%
Associates degree	10%
Vocational	2%
High school	5%

	Overall
<b>AGE</b>	
18-34	32%
35-49	27%
50-64	28%
65+	13%
MEAN	45.00
MEDIAN	44
<b>TRIPS TO HAWAI'I</b>	
First-time	38%
Repeat	62%
<b>ISLANDS VISITED</b>	
O'ahu	67%
Island of Hawai'i	13%
Maui	34%
Kaua'i	6%
Lana'i	-%
Moloka'i	0%
<b>ISLANDS VISITED</b>	
Single island	82%
Multi-island trip	18%

	Overall
<b>ACCOMMODATIONS</b>	
Hotel/ villa/ resort	52%
Condo/ apartment	18%
Timeshare	10%
Friends/ family	9%