

Hawai'i Tourism Authority

Marketing Effectiveness Study

Year End 2018

External



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Marketing Effectiveness Study Objectives

- Hawai'i welcomed nearly 10 million visitors in 2018.
- With almost \$18 billion spent by visitors in-destination and over 200,000 jobs supported, the travel industry is a vital component of Hawai'i's economy, accounting for \$2 billion in tax revenues for the state
- The Hawai'i Tourism Authority seeks to measure:
 - The impact of its Global Marketing Contractor's Integrated Marketing Campaigns and their effect on awareness of Hawai'i as a destination, including brand perceptions and intent to visit among major market areas
 - How Hawai'i ranks among its competitive set
 - Target audience behaviors, attitudes, and motivators towards travel



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Executive Highlights

Other Highlights – North America Travel Characteristics

US West & US East

- **Reasons for Vacationing:** Both US West (USW) and US East (USE) residents are more likely to take a vacation to spend quality time with their spouse/family, to explore and do new things, and for rest and relaxation.
- **Previous Hawai'i Visits:** More than one-third of USW residents (37%) have visited Hawai'i in the past three years, more than any other competitor destination. Hawai'i ranks sixth as most visited destination for USE residents (14%), falling far behind major competitors like Florida (56%), the Caribbean (30%), California (27%), Mexico (17%), and Europe (16%).
- **Future Hawai'i Visits:** Among destinations USW residents are interested in visiting in the next two years, Hawai'i scores nearly double that of the second highest destination – Italy (47% vs 27%). For USE residents, 27 percent say they are considering Hawai'i in the next two years, ranking third among the competitive set.
- **Future Island Visits:** For those planning to visit Hawai'i in the next year, more than half of US residents (55%) plan to go to Maui, while 35 percent are planning to visit O'ahu, and 34 percent plan to go to Island of Hawai'i or Kauai'i.
- **Never Been's:** USE residents are much more likely to have never visited Hawai'i before (45%), while 24 percent have visited just once. More than half of USW residents have visited more than twice. Only 20 percent of USW residents have never visited Hawai'i.
- **Reasons for Returning:** Stunning natural beauty, great beaches, and weather are among the top reasons why both USW and USE residents continue to vacation in Hawai'i. Nearly half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, USE residents are more likely to use hotels compared to USW residents (66% vs 50%).

Canada

- **Reasons for Vacationing:** Canadians see vacations as a time to rest and relax, spend quality time with their spouse/family, explore/do new things, and to experience other cultures.
- **Previous Hawai'i Visits:** Just 14 percent of Canadian residents have visited Hawai'i in the past three years, falling seventh in the competitive ranking. Around one third of Canadians have visited Europe, the Caribbean, or Florida in the past three years.
- **Future Hawai'i Visits:** Among destinations Canadians are interested in visiting in the next two years, Hawai'i falls in third at 35 percent, below Europe (50%) and the Caribbean (41%). At the same time, just 14 percent of Canadian residents plan to visit Hawai'i in the next year, again ranking fifth among the competitive set.
- **Future Island Visits:** For those who are planning to visit, 46 percent plan to go to Maui, while 38 percent plan to go to O'ahu and 31 percent intend to visit the Island of Hawai'i.
- **Never Been's:** Half of Canadian residents (50%) have never visited Hawai'i before, while 24 percent have visited once and 26 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches are among the top reasons why Canadians continue to vacation in Hawai'i. Nearly half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, more than 57 percent plan to stay in a hotel, followed distantly by cruise ship (15%), condo (14%), and rental house (14%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the cost of vacation package and airfare rank among the top reasons not to visit, followed by an unfavorable exchange rate and price of hotel.

Other Highlights – Japan and Korea Travel Characteristics

Japan

- **Reasons for Vacationing:** Japan residents see vacations as a time to rest and relax, indulge their passion for food and cuisine, to feel alive and energetic, and to experience other cultures.
- **Previous Hawai'i Visits:** More than one third of Japanese residents (34%) have visited Hawai'i in the past three years, ranking at the top of the competitive set and on par with Europe.
- **Future Hawai'i Visits:** Among destinations Japanese are interested in visiting in the next two years, Hawai'i falls in second place at 47 percent, below Europe (50%). Around one quarter (24%) plan to visit Hawai'i in the next year, equivalent to Europe (24%).
- **Future Island Visits:** For those who are planning to visit, 75 percent plan to go to O'ahu, while 44 percent intend to visit the Island of Hawai'i and 39 percent plan to go to Maui.
- **Never Been's:** One third of Japanese residents (30%) have never visited Hawai'i before, while 28 percent have visited once and 42 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, great beaches, weather, and safety are among the top reasons why the Japanese continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 89 percent plan to stay in a hotel, followed distantly by condos (16%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the price of airfare/hotel, not having enough time to travel, and having been before and wishing to try another destination are among the top travel barriers.

Korea

- **Reasons for Vacationing:** Korean residents see vacations as a time to relax, spend quality time with their spouse/family, to experience other cultures, and to feel alive and energetic.
- **Previous Hawai'i Visits:** Over one in ten Korean residents (12%) have visited Hawai'i in the past three years, ranking close to the bottom of the competitive set.
- **Future Hawai'i Visits:** Among destinations Koreans are interested in visiting in the next two years, Hawai'i ranks fourth at 35 percent, following Europe (45%), Southeast Asia (41%), and tying with Australia (35%). Nearly one fifth (18%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 57 percent plan to go to the Island of Hawai'i, while 41 percent intend to visit Maui, and 35 percent plan to go to O'ahu.
- **Never Beens:** Two thirds of Korean residents (65%) have never visited Hawai'i before, while 23 percent have visited once.
- **Reasons for Returning:** Great beaches, stunning natural beauty, great weather, and dining options are among the top reasons why Koreans continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 86 percent plan to stay in a hotel, followed distantly by condos (29%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the price of airfare, the flight being too long, and not having enough time to travel to Hawai'i are among the top travel barriers.

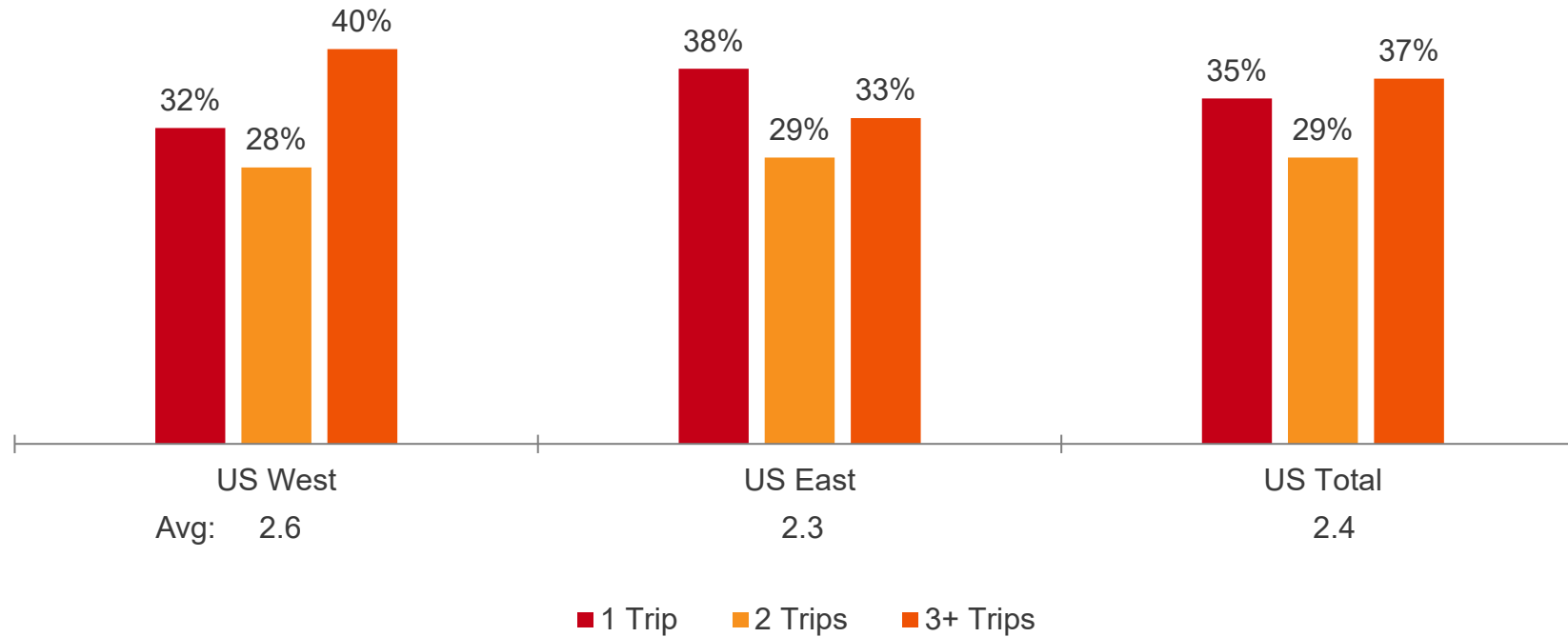
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Summary of Market – US

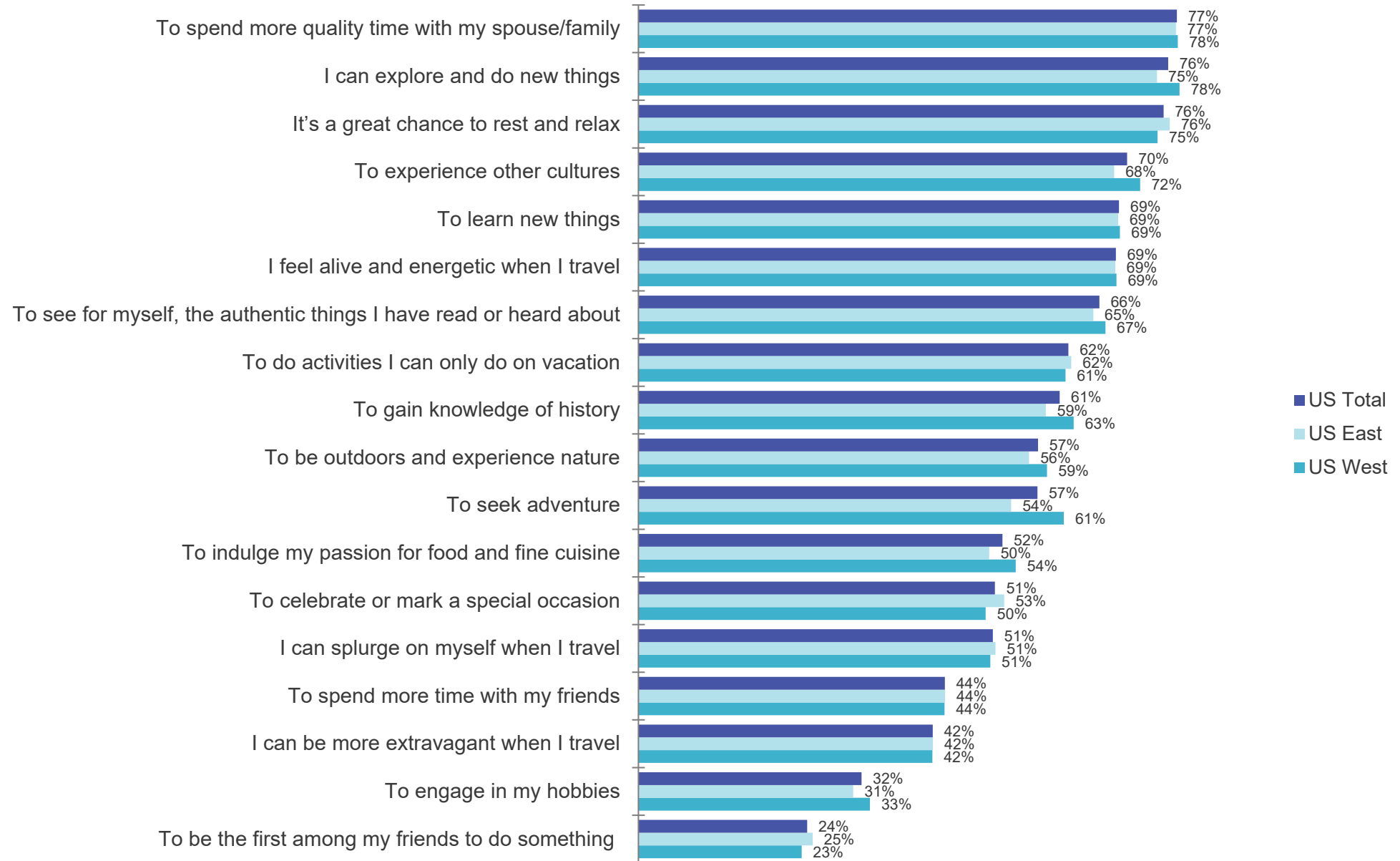
Demographics by Market

	US West	US East	US Total
<i>Base:</i>	1,201	1,201	2,402
Gender			
Male	46%	43%	45%
Female	54%	57%	55%
Marital Status			
Single	10%	9%	10%
Married	68%	74%	71%
Employment			
Full Time Employed	51%	47%	49%
Retired	31%	34%	33%
Education Level			
Graduated College	77%	79%	78%
Race/Ethnicity			
White	82%	89%	85%
Black/African America	3%	6%	5%
Asian/Pacific Islander	11%	4%	7%
Hispanic/Latino	6%	4%	5%
Children in Household (1+)			
Children at Home	28%	27%	27%
Age			
18-24	5%	1%	3%
25-34	16%	13%	14%
35-44	12%	15%	13%
45-54	16%	13%	14%
55-64	20%	25%	23%
65+	30%	34%	32%
Average	52.4	55.1	53.8
Household Income			
\$75 - \$99,999	30%	36%	33%
\$100 - \$150,000	40%	39%	40%
\$150,000+	30%	25%	27%
Average	\$130,141	\$125,031	\$127,586

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years

US West		
1	Hawai'i	37%
2	Mexico	26%
3	Caribbean	18%
4	United Kingdom (UK)	17%
5	Europe	17%
6	Italy	16%
7	France	15%
8	Alaska	14%
9	Germany	12%
10	Central/South America	10%
11	Southeast Asia	9%
12	Australia	7%
13	Switzerland	6%

US East		
1	Florida	56%
2	Caribbean	30%
3	California	27%
4	Mexico	17%
5	Europe	16%
6	Hawai'i	14%
7	Italy	13%
8	United Kingdom (UK)	12%
9	France	12%
10	Germany	9%
11	Central America	8%
12	Puerto Rico	8%
13	Bermuda	6%
14	South America	6%
15	Switzerland	6%
16	Southeast Asia	5%
17	Iceland	4%
18	Cuba	3%

Destinations Visited Past 12 Months

US West		
1	Hawai'i	22%
2	Mexico	14%
3	United Kingdom (UK)	10%
4	Caribbean	9%
5	Europe	9%
6	Italy	8%
7	France	7%
8	Alaska	6%
9	Germany	6%
10	Central/South America	5%
11	Southeast Asia	5%
12	Australia	4%
13	Switzerland	3%

US East		
1	Florida	43%
2	Caribbean	17%
3	California	16%
4	Mexico	9%
5	Europe	8%
6	United Kingdom (UK)	7%
7	Hawaii	6%
8	Italy	5%
9	France	5%
10	Germany	4%
11	Puerto Rico	4%
12	Central America	3%
13	Bermuda	3%
14	South America	3%
15	Switzerland	2%
16	Southeast Asia	2%
17	Cuba	2%
18	Iceland	2%

Destinations Considering for Next Overnight Vacation

US West		
1	Hawai'i	39%
2	United Kingdom (UK)	19%
3	Caribbean	19%
4	Italy	19%
5	Mexico	18%
6	France	16%
7	Alaska	16%
8	Europe	15%
9	Australia	14%
10	Germany	10%
11	Central/South America	10%
12	Southeast Asia	9%
13	Switzerland	8%

US East		
1	Florida	34%
2	Caribbean	27%
3	California	20%
4	Hawai'i	16%
5	Italy	15%
6	United Kingdom (UK)	14%
7	Europe	13%
8	France	11%
9	Mexico	11%
10	Bermuda	8%
11	Puerto Rico	7%
12	Germany	7%
13	South America	6%
14	Central America	6%
15	Iceland	6%
16	Switzerland	5%
17	Southeast Asia	5%
18	Cuba	4%

Destinations Interested in Visiting Next 24 Months

US West		
1	Hawai'i	47%
2	Italy	27%
3	Alaska	26%
4	Australia	24%
5	United Kingdom	24%
6	Caribbean	24%
7	France	22%
8	Europe	21%
9	Germany	18%
10	Mexico	18%
11	Switzerland	15%
12	Central/South America	13%
13	Southeast Asia	13%

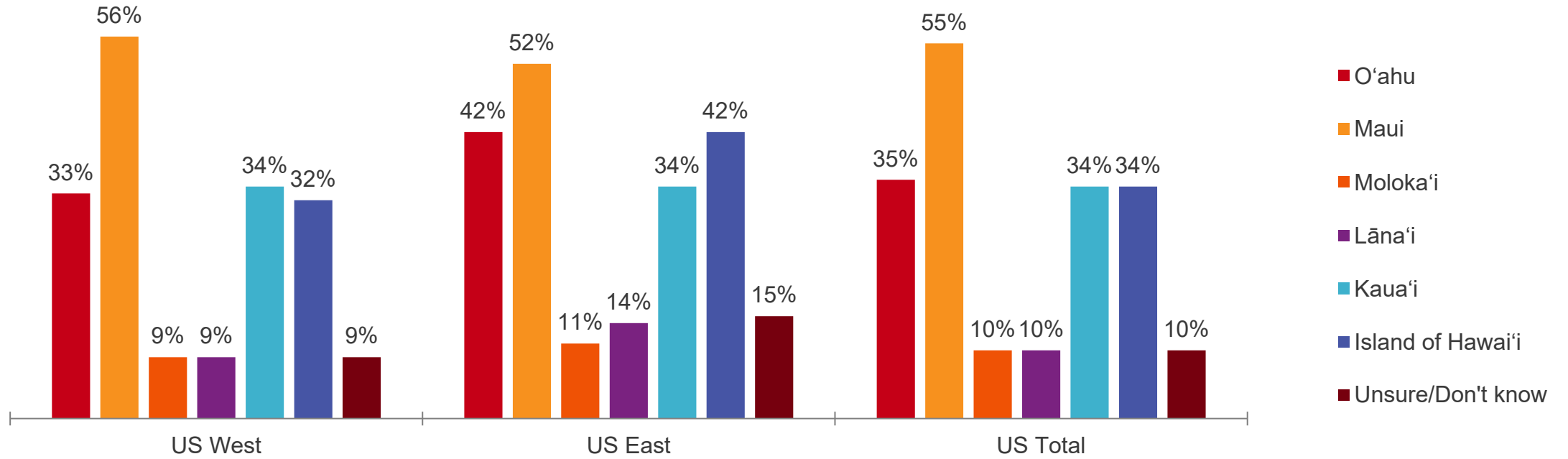
US East		
1	Florida	38%
2	Caribbean	33%
3	Hawai'i	27%
4	Italy	27%
5	California	25%
6	Europe	23%
7	United Kingdom	21%
8	France	18%
9	Germany	14%
10	Bermuda	14%
11	Switzerland	13%
12	Iceland	12%
13	Mexico	11%
14	South America	9%
15	Puerto Rico	9%
16	Central America	8%
17	Southeast Asia	8%
18	Cuba	7%

Destinations Plan to Visit Next 12 Months

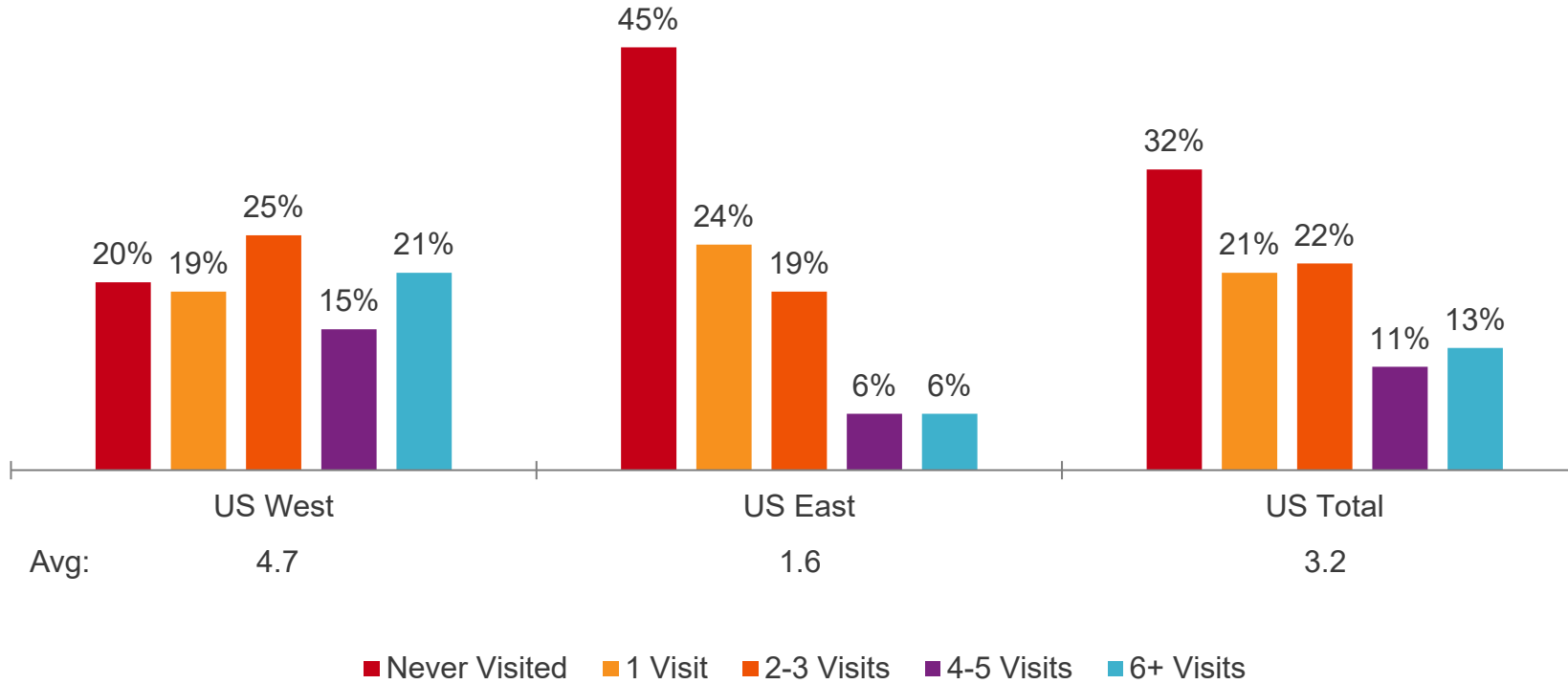
US West		
1	Hawai'i	28%
2	Mexico	10%
3	Europe	10%
4	Italy	10%
5	United Kingdom (UK)	9%
6	Caribbean	9%
7	Alaska	9%
8	France	8%
9	Australia	7%
10	Germany	6%
11	Central/South America	6%
12	Southeast Asia	5%
13	Switzerland	5%

US East		
1	Florida	28%
2	Caribbean	18%
3	California	13%
4	Europe	11%
5	Italy	10%
6	Hawai'i	9%
7	United Kingdom (UK)	8%
8	France	7%
9	Mexico	5%
10	Germany	5%
11	Bermuda	4%
12	South America	4%
13	Puerto Rico	4%
14	Central America	3%
15	Switzerland	3%
16	Southeast Asia	3%
17	Iceland	3%
18	Cuba	2%

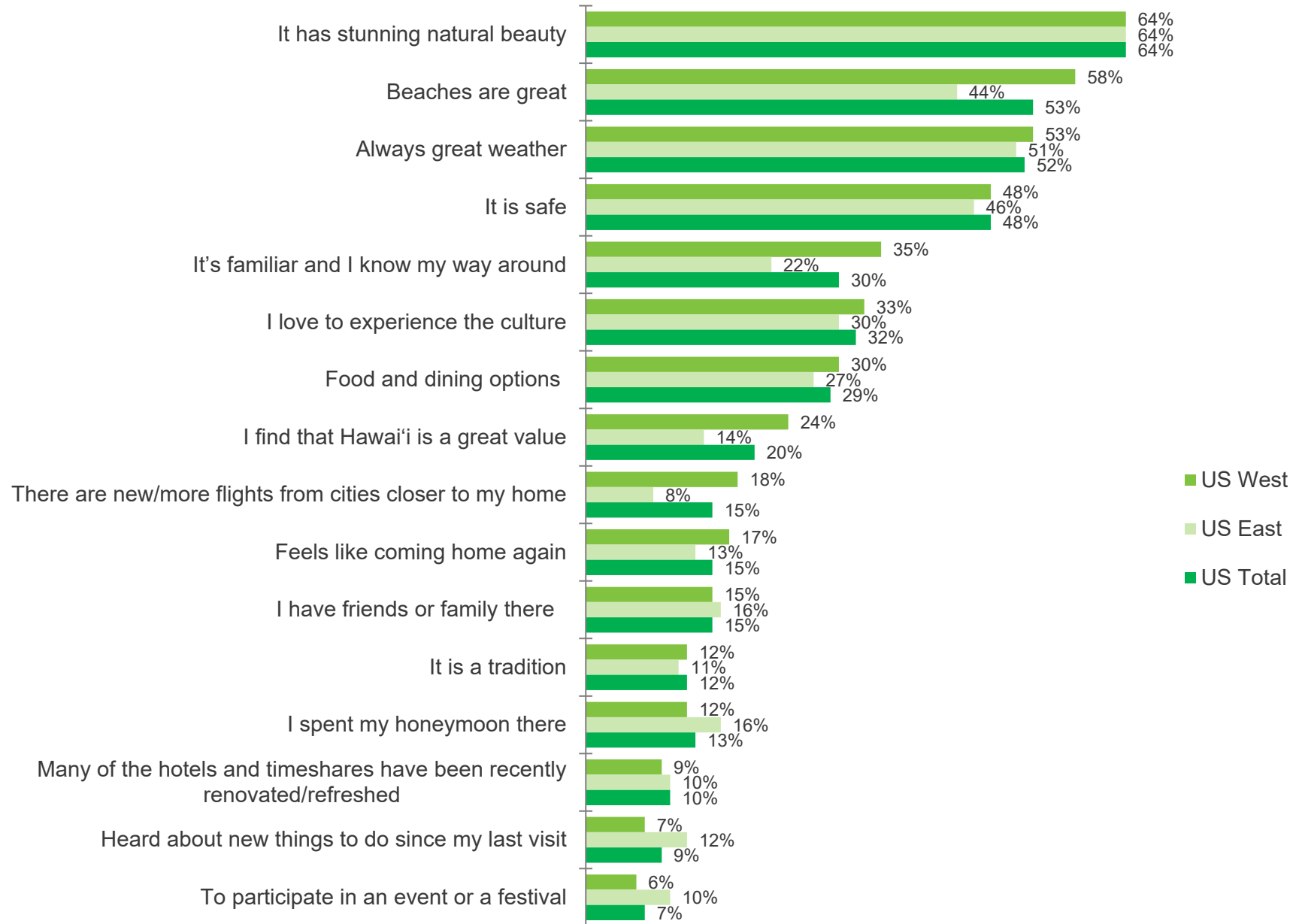
Hawaiian Islands Plan to Visit Next 12 Months



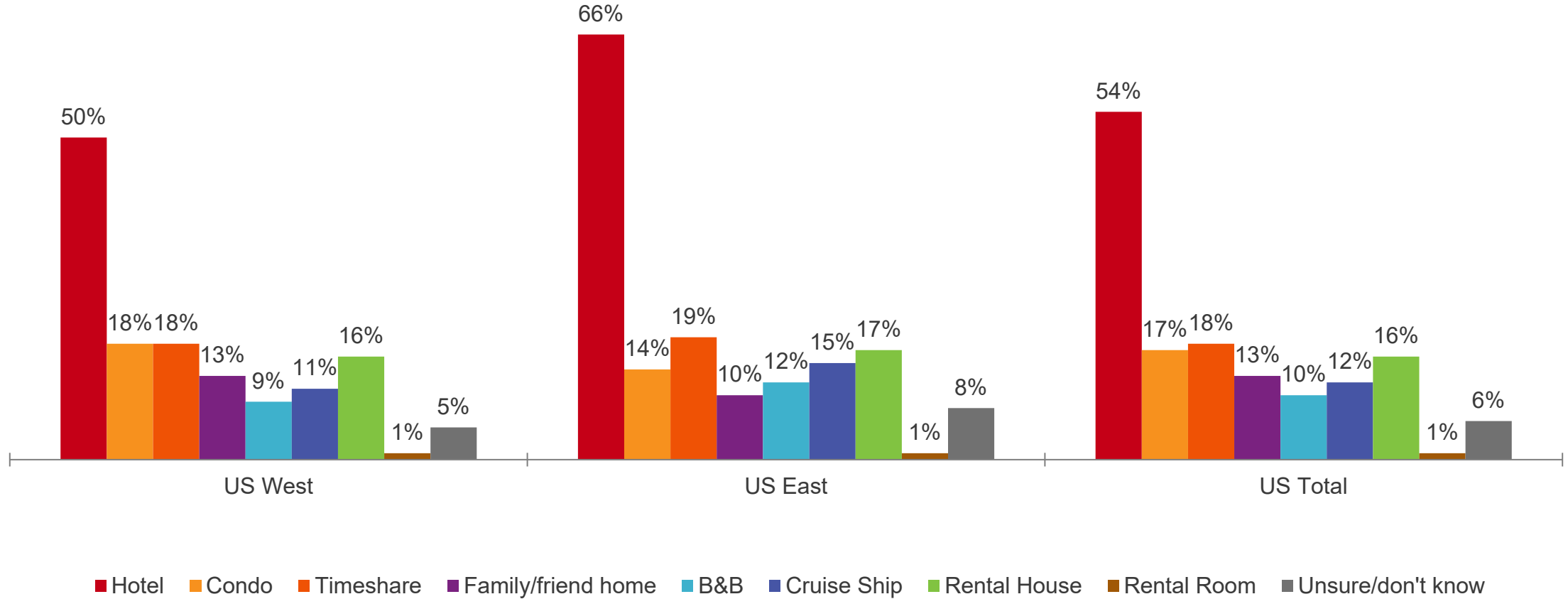
Number of Times Visited Hawai'i in Lifetime



Reasons for Returning to Hawai'i



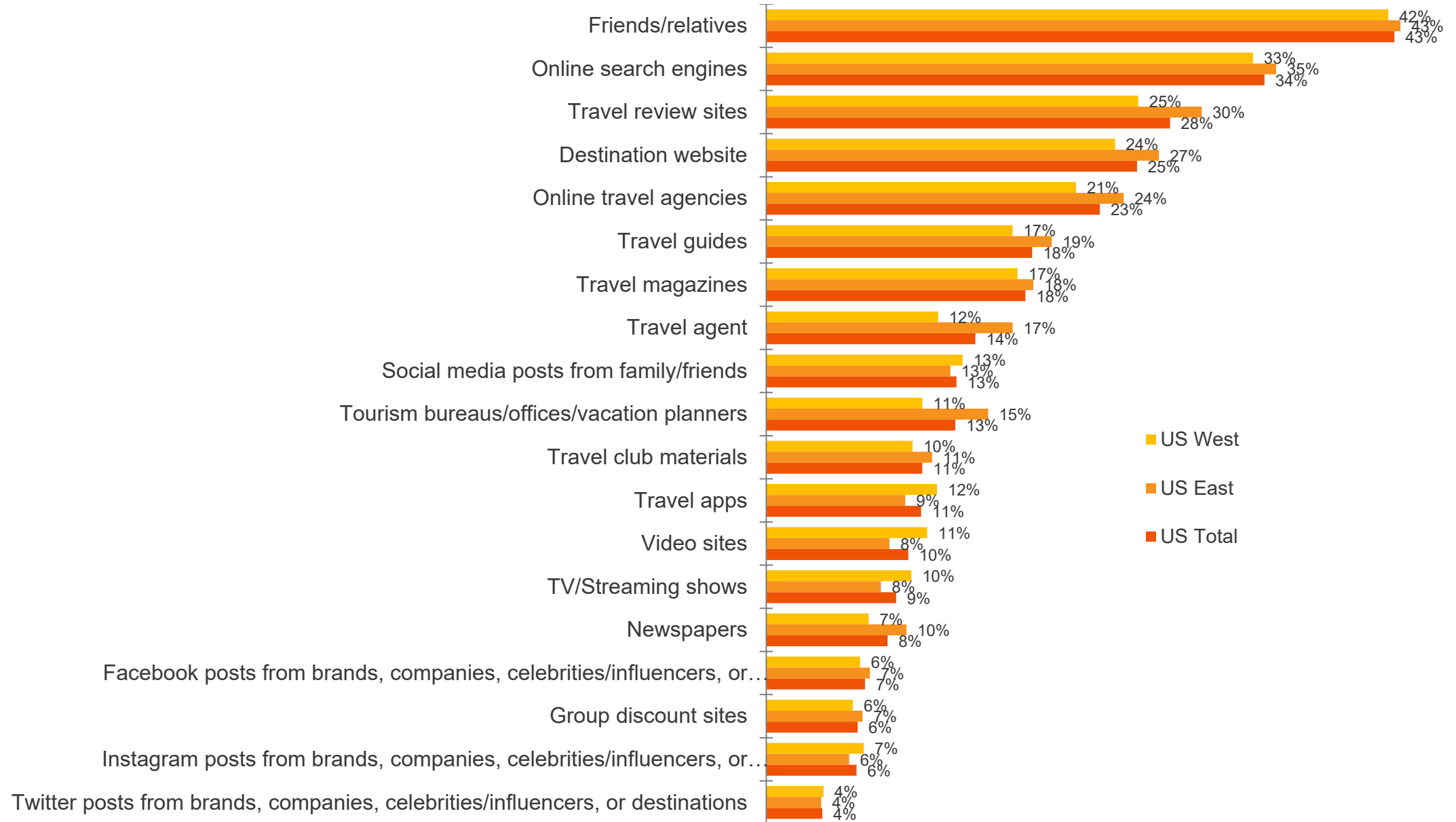
Hawai'i Planned Accommodations



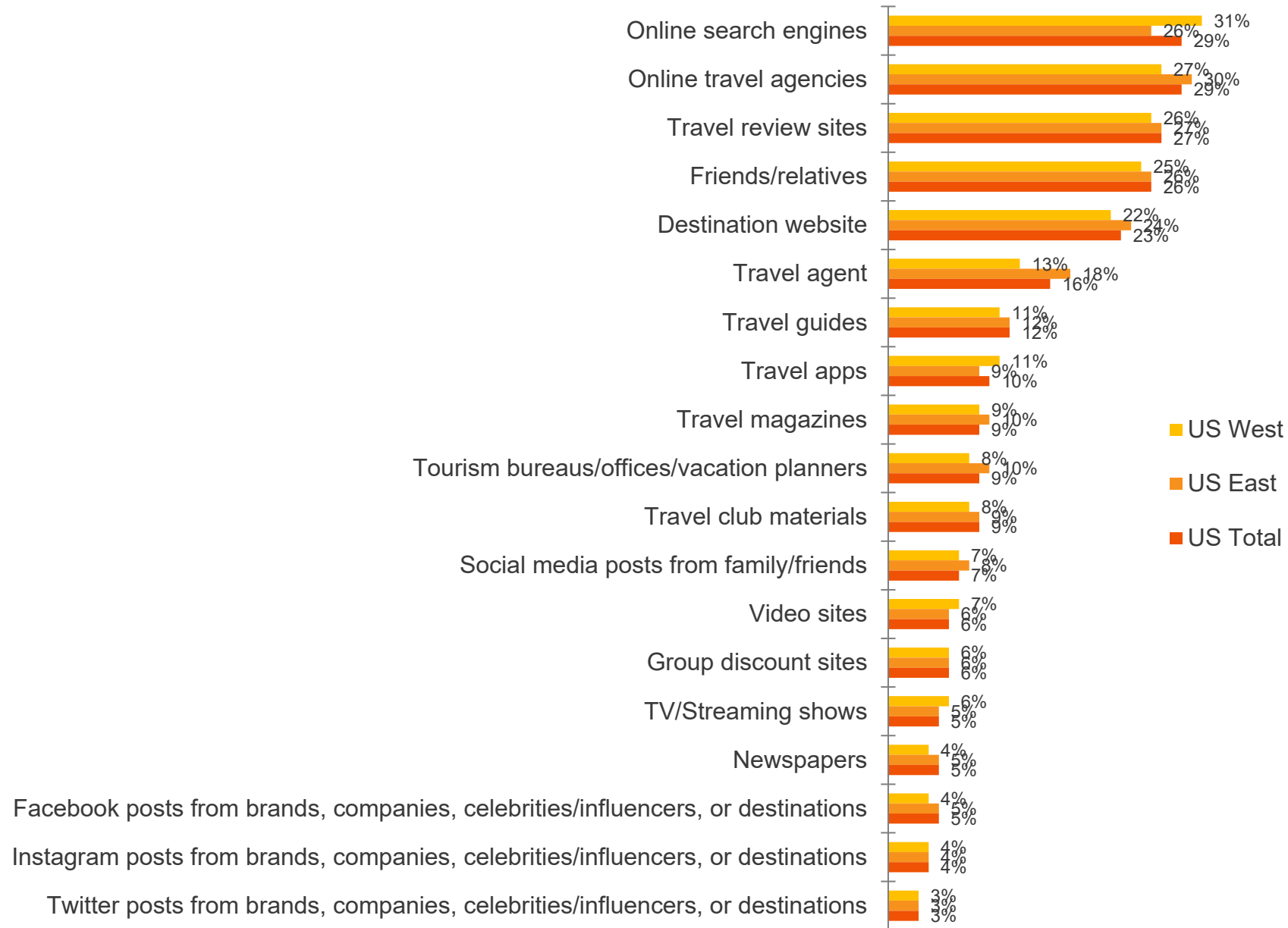
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



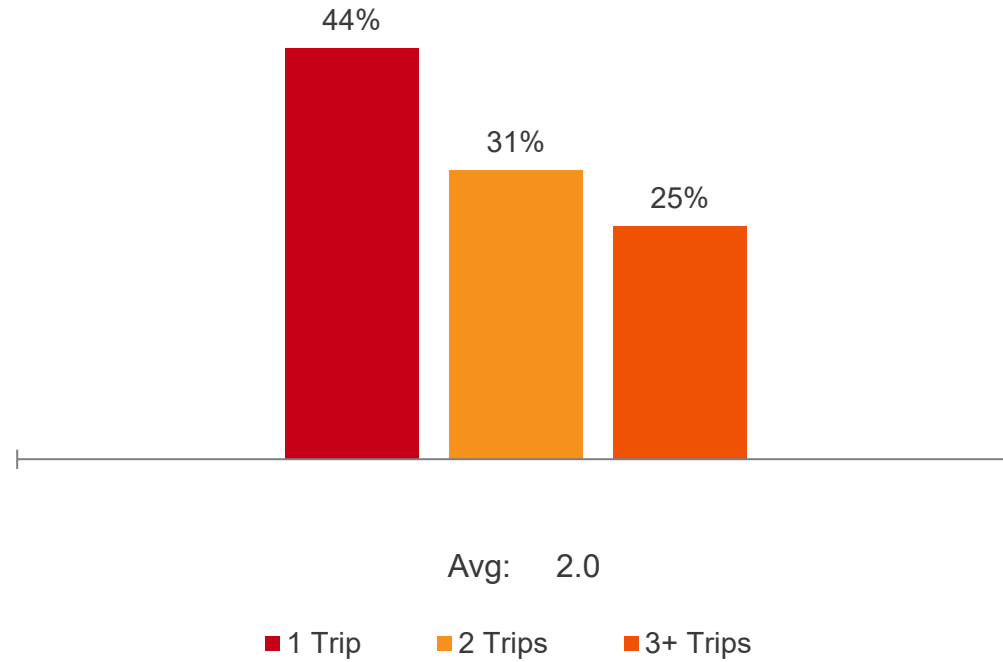
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Summary of Markets – Canada

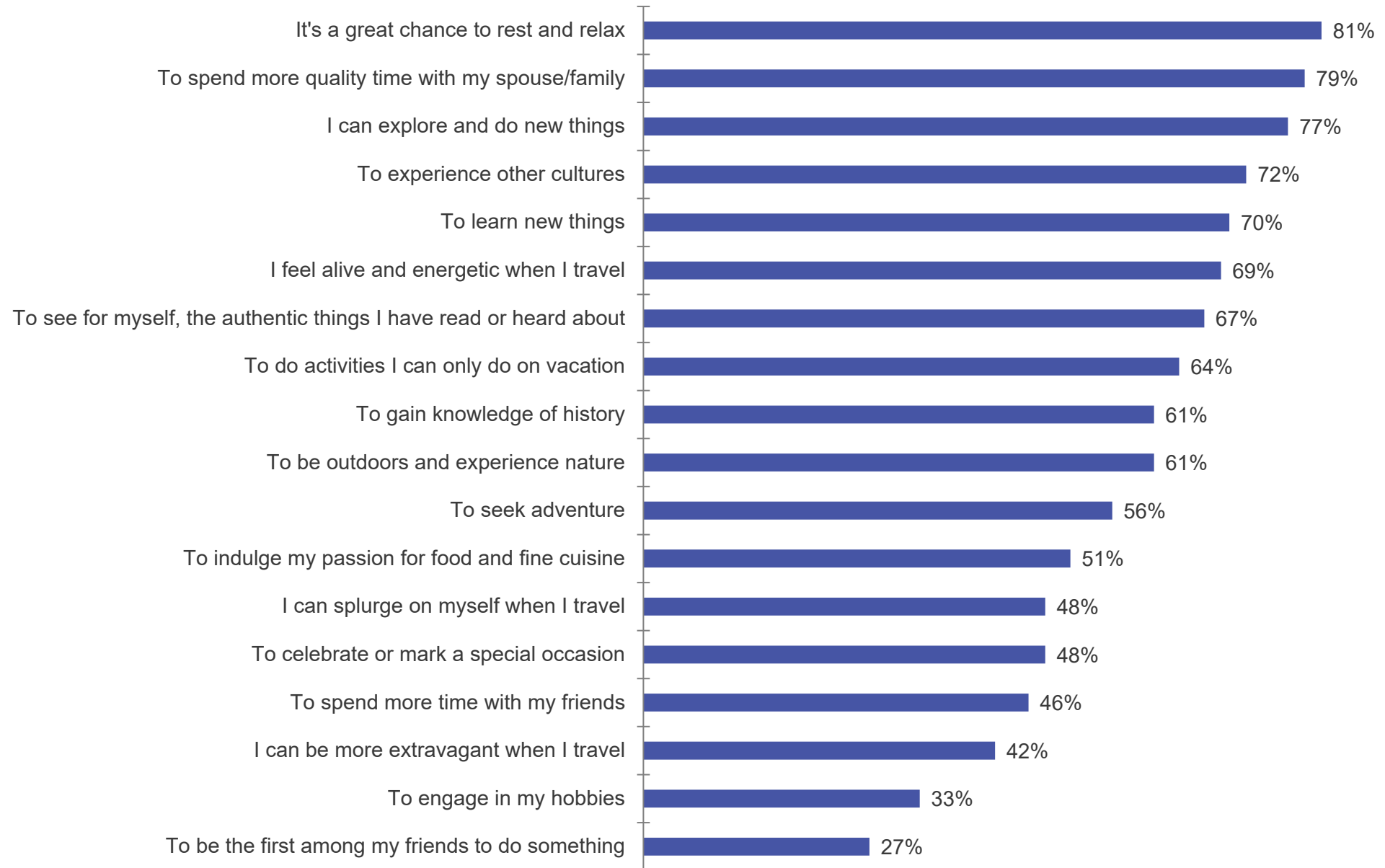
Demographics by Market

	Canada
<i>Base:</i>	1203
Gender	
Male	54%
Female	46%
Marital Status	
Single	10%
Married	67%
Employment	
Full Time Employed	61%
Retired	26%
Education Level	
Graduated College	79%
Race/Ethnicity	
White	82%
Black/African America	2%
Asian/Pacific Islander	13%
Hispanic/Latino	1%
Children in Household (1+)	
Children at Home	36%
Age	
18-24	1%
25-34	15%
35-44	20%
45-54	20%
55-64	22%
65+	23%
Average	51.6
Household Income	
\$75 - \$99,999	37%
\$100 - \$150,000	42%
\$150,000+	20%
Average	\$121,893

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	37%
2	Caribbean	33%
3	Florida	32%
4	Mexico	30%
5	Las Vegas	26%
6	California	24%
7	Hawai'i	14%
8	Arizona	11%

Visited Past Year		
1	Europe	24%
2	Caribbean	20%
3	Florida	19%
4	Mexico	15%
5	California	13%
6	Las Vegas	13%
7	Hawai'i	8%
8	Arizona	5%

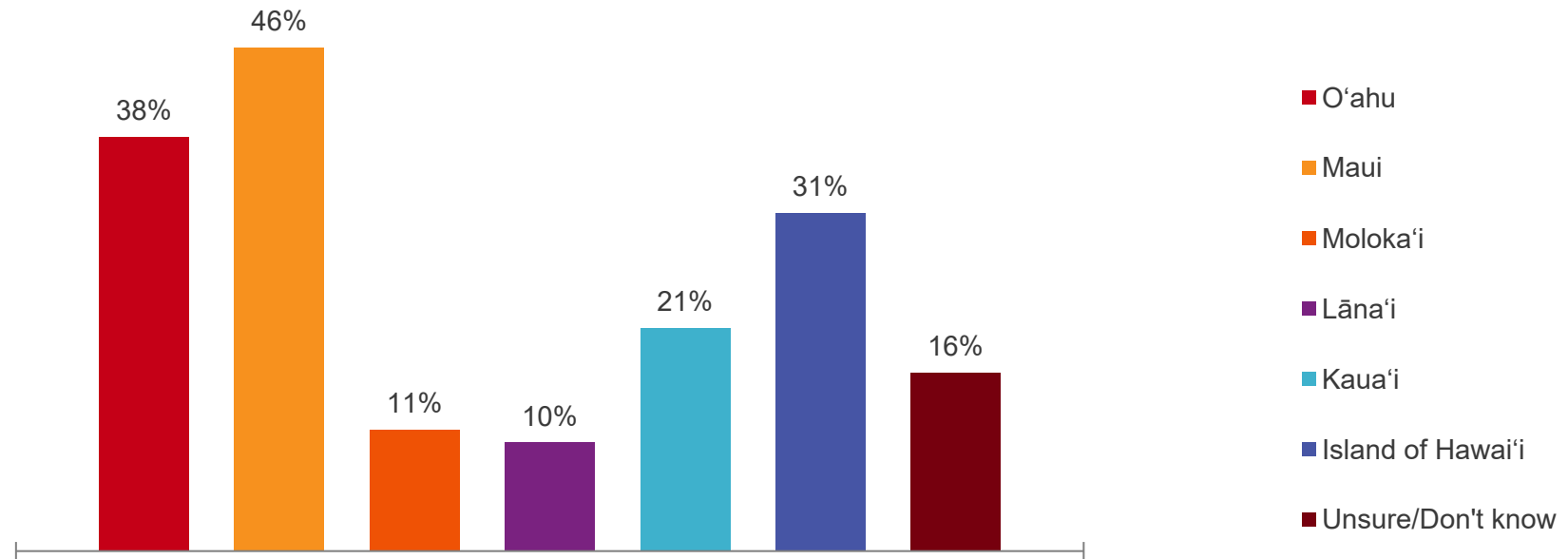
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	36%
2	Caribbean	30%
3	Florida	27%
4	California	25%
5	Las Vegas	24%
6	Mexico	23%
7	Hawai'i	22%
8	Arizona	9%

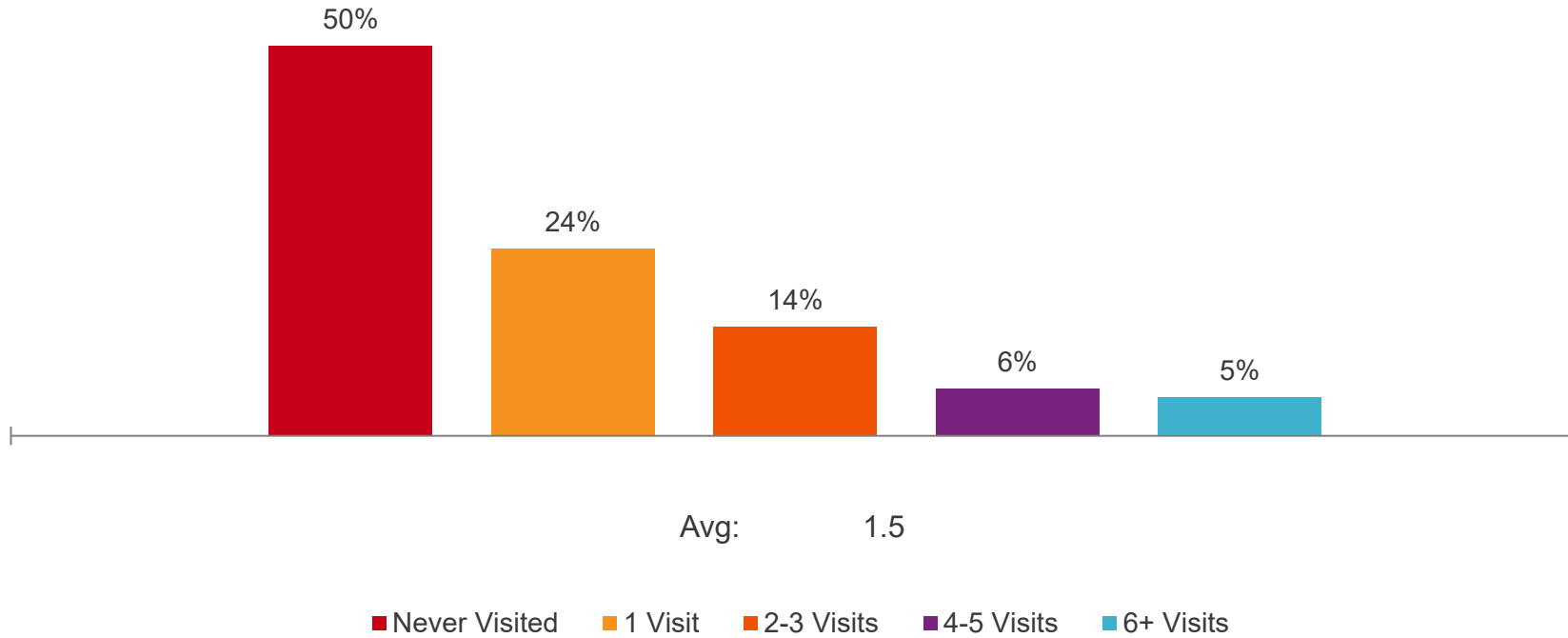
Interested Next 24 Months		
1	Europe	50%
2	Caribbean	41%
3	Hawai'i	35%
4	California	31%
5	Florida	31%
6	Las Vegas	27%
7	Mexico	27%
8	Arizona	17%

Planning Next 12 Months		
1	Europe	28%
2	Caribbean	23%
3	Florida	18%
4	Mexico	14%
5	Hawai'i	14%
6	California	14%
7	Las Vegas	14%
8	Arizona	7%

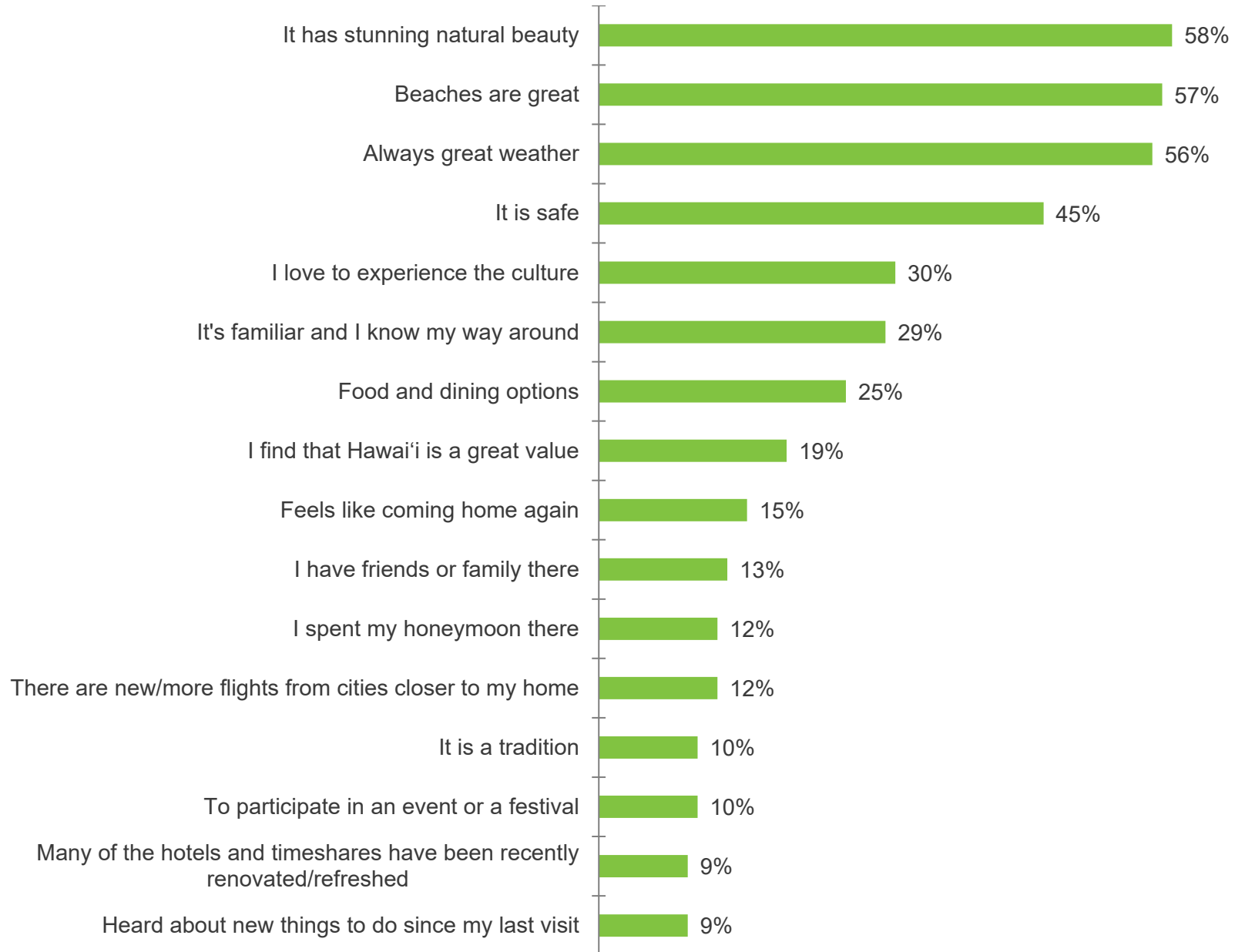
Hawaiian Islands Plan to Visit Next 12 Months



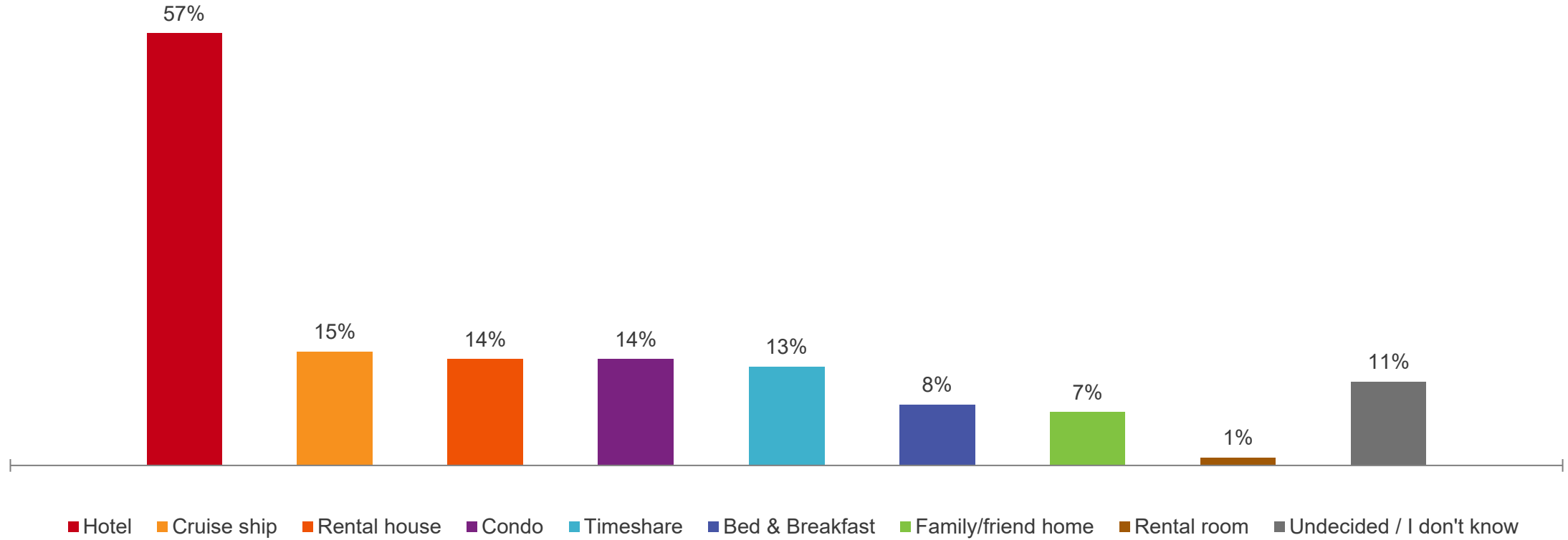
Number of Times Visited Hawai'i in Lifetime



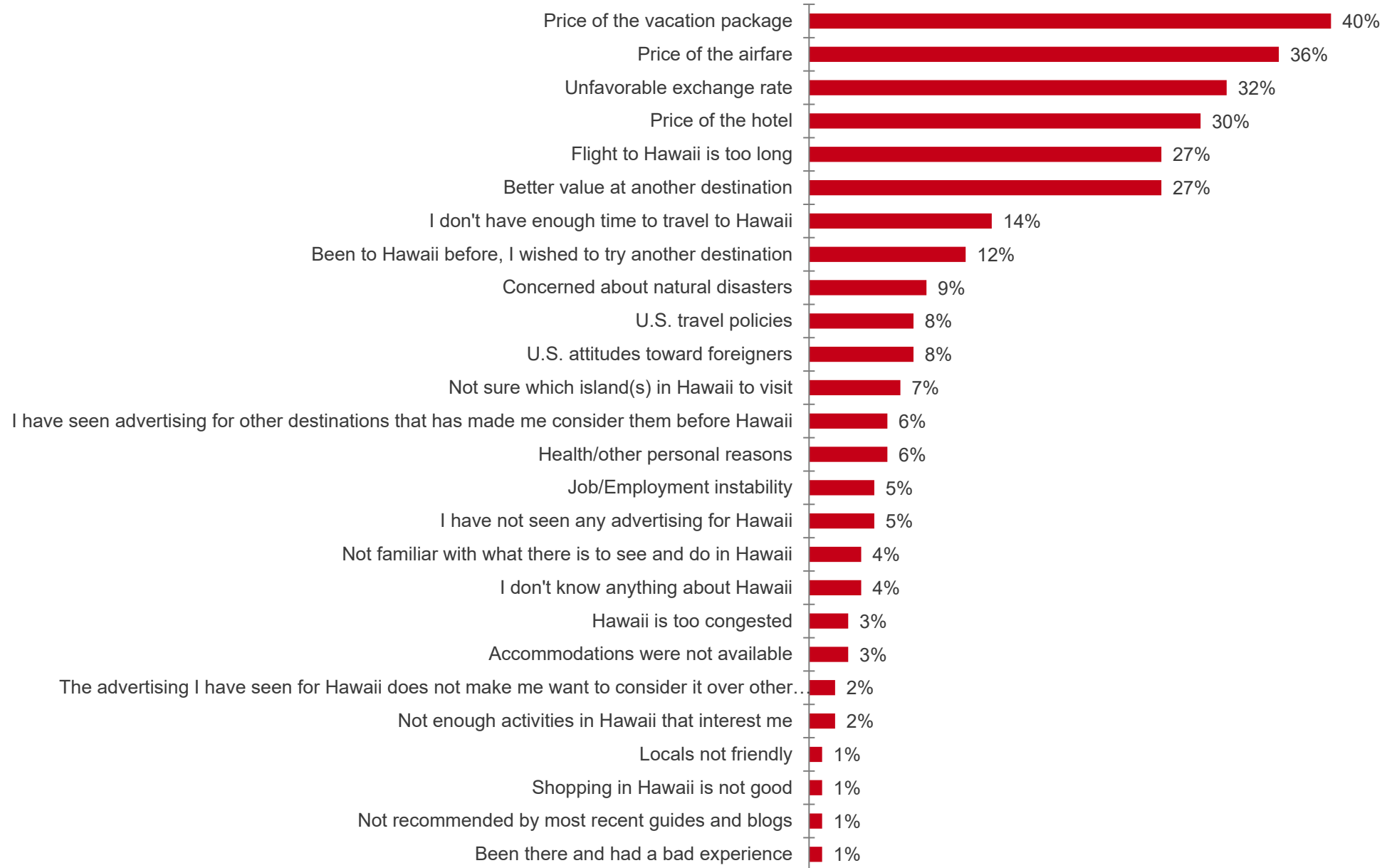
Reasons for Returning to Hawai'i



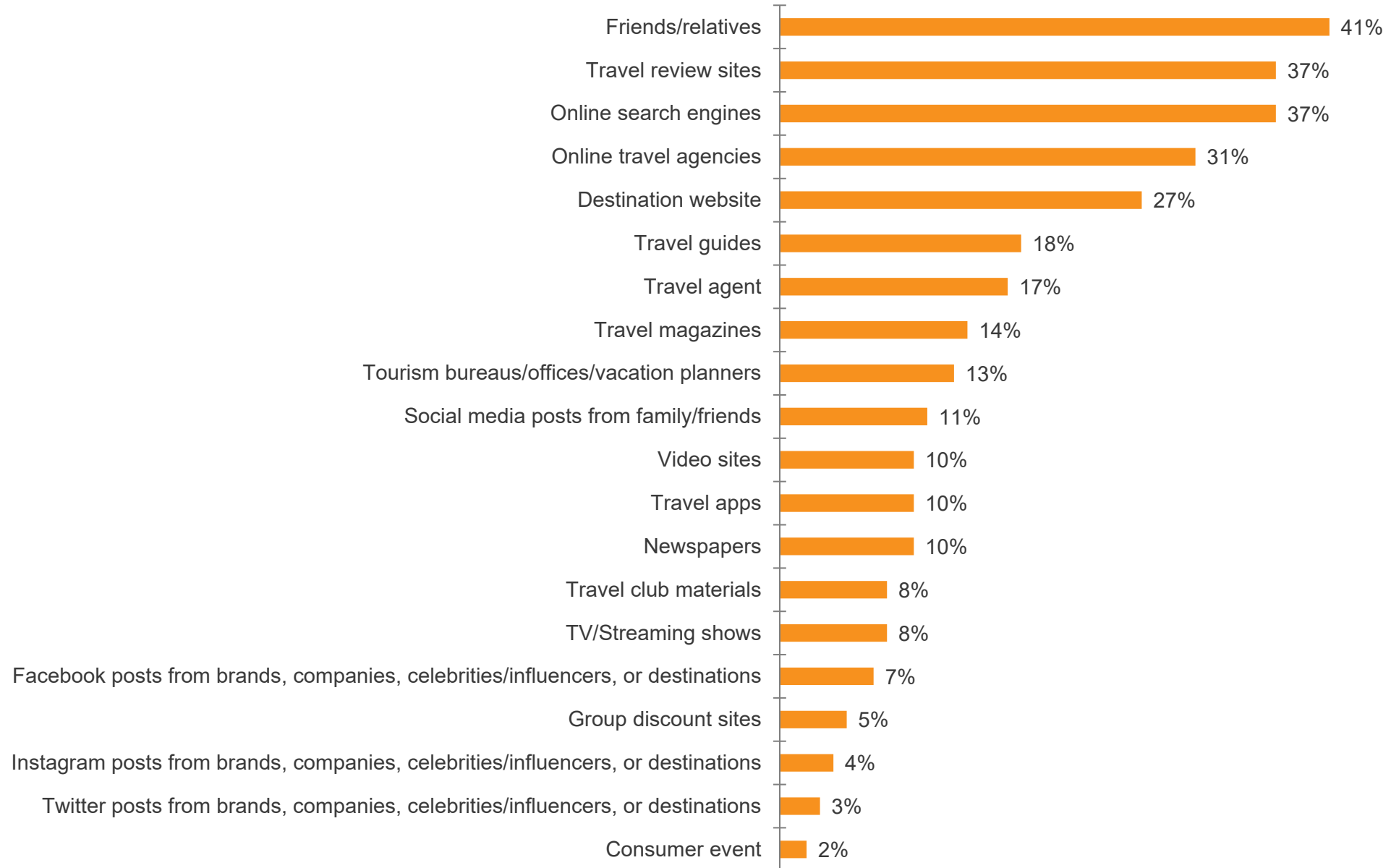
Hawai'i Planned Accommodations



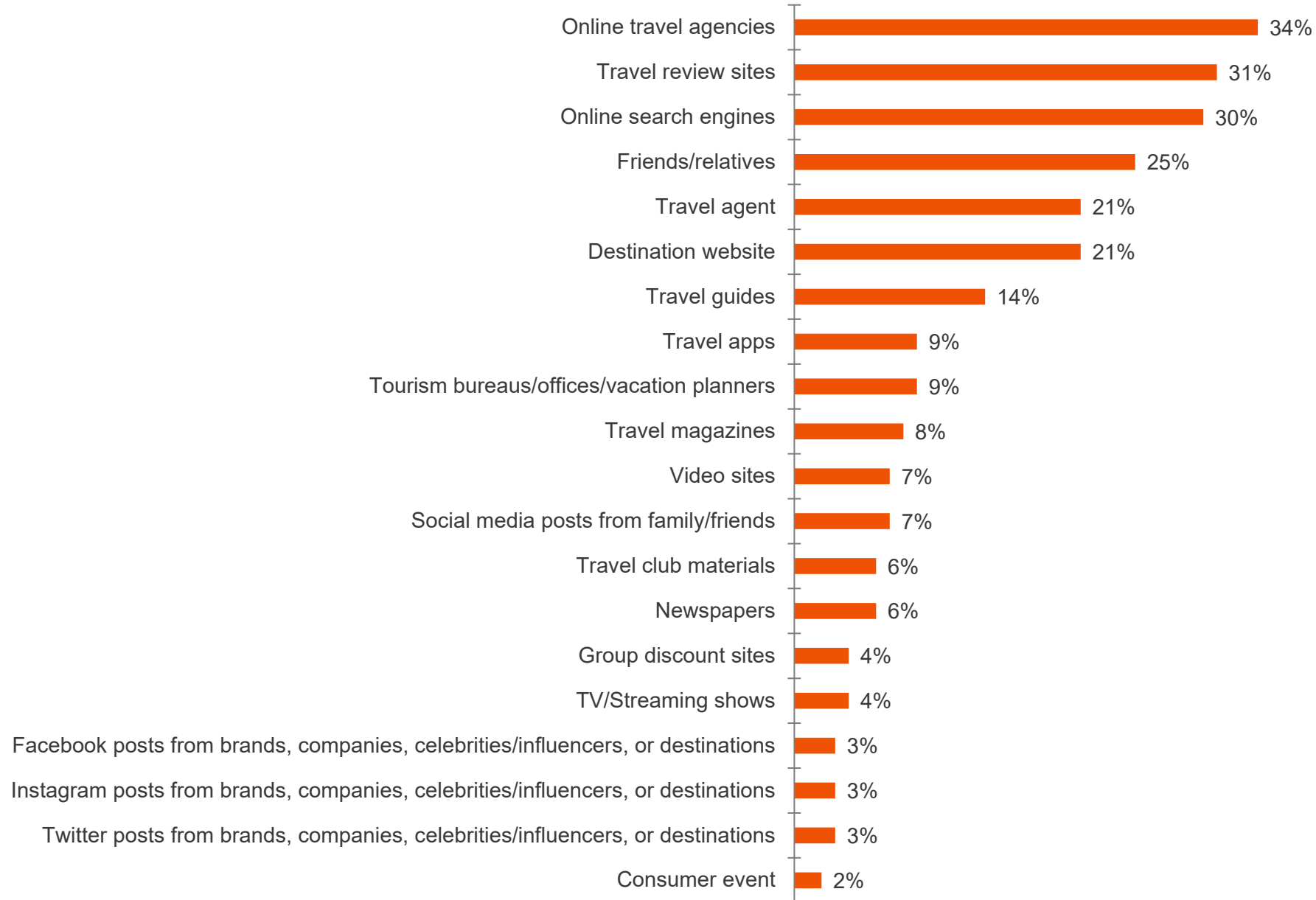
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



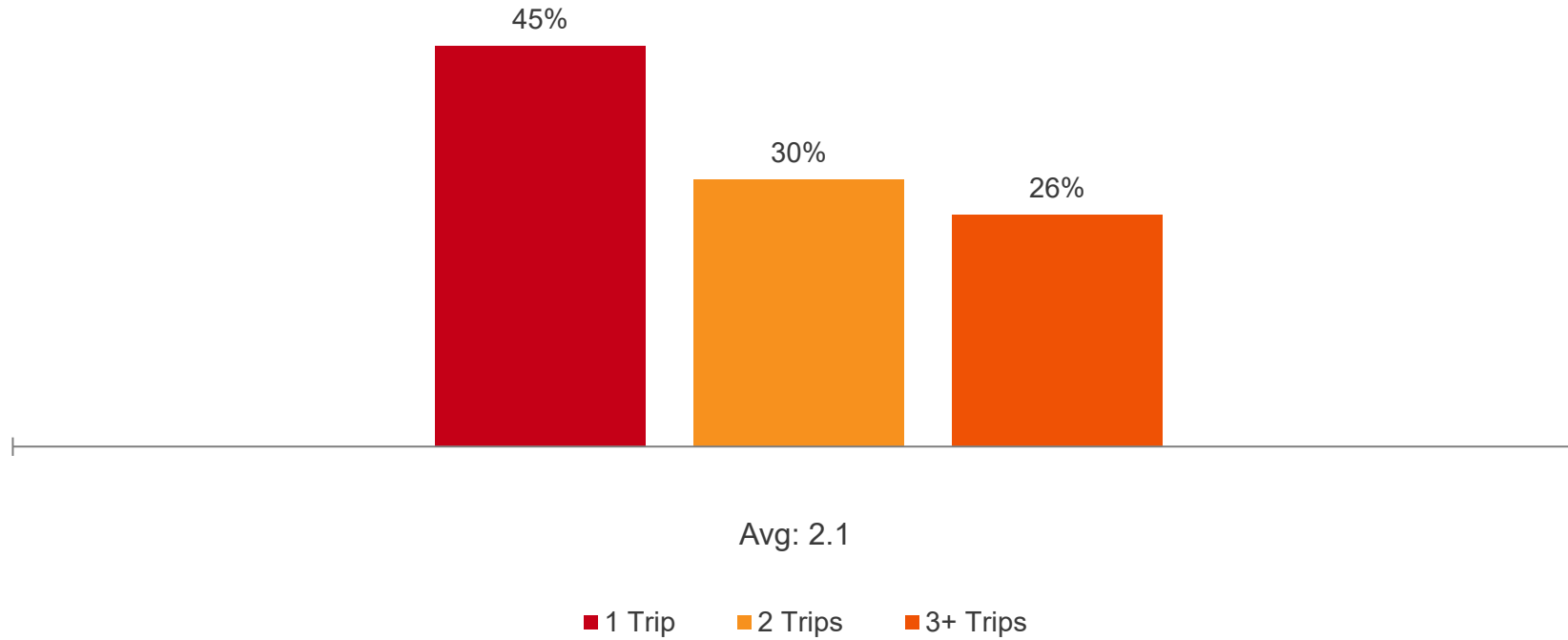
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Summary of Markets – Japan

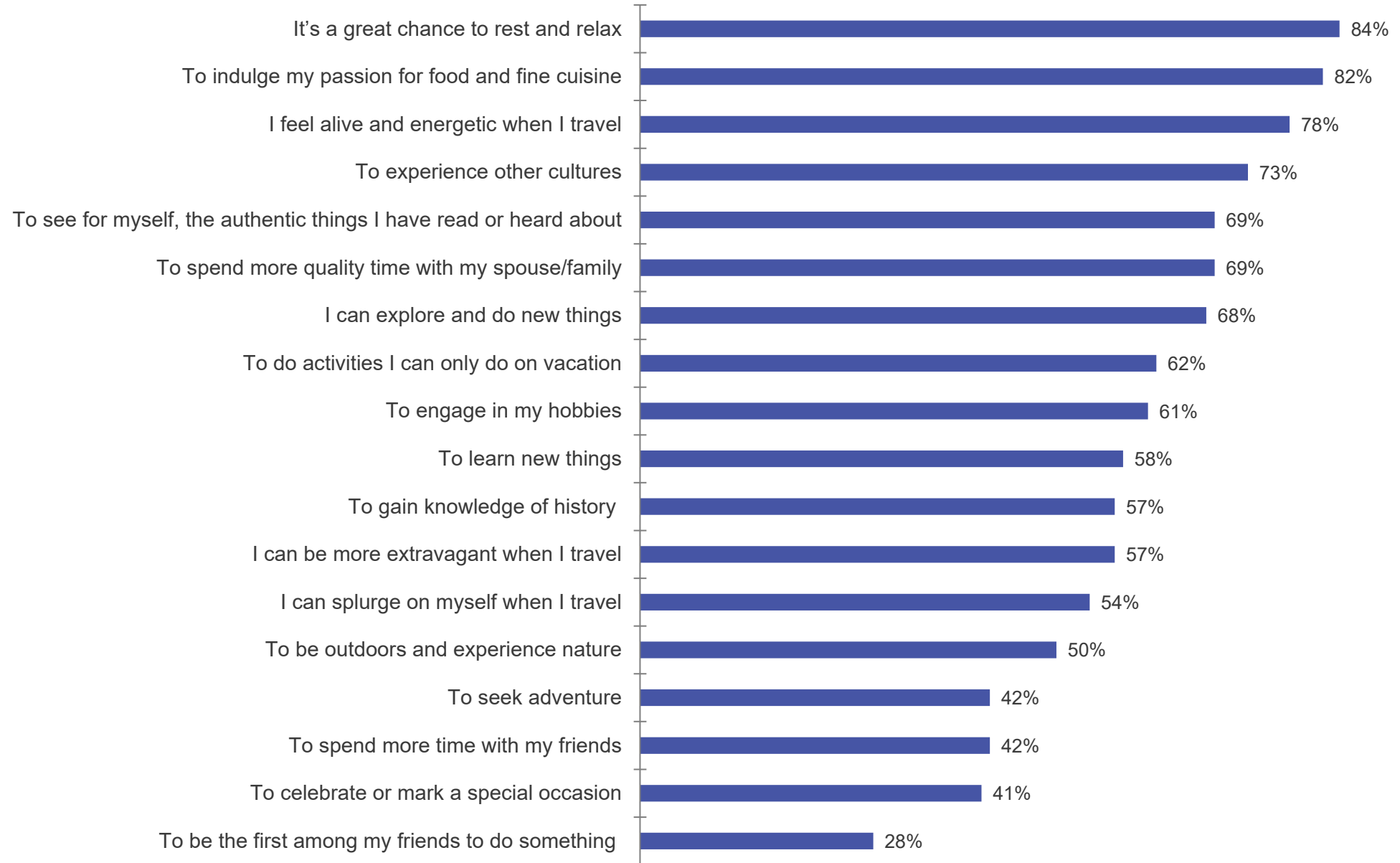
Demographics by Market

	Japan
<i>Base:</i>	1,201
Gender	
Male	67%
Female	33%
Marital Status	
Single	27%
Married	64%
Employment	
Full Time Employed	69%
Retired	7%
Education Level	
Graduated College	78%
Children in Household (1+)	
Children at Home	31%
Age	
18-24	2%
25-34	14%
35-44	25%
45-54	24%
55-64	20%
65+	15%
Average	49.0
Household Income	
Under ¥7,000,000	46%
¥7 - ¥9,999,999	29%
¥10 - ¥14,999,999	18%
¥15,000,000+	7%
Average	¥7,952,123

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Hawai'i	34%
2	Europe	33%
3	Australia	21%
4	Singapore	21%
5	Korea	19%
6	Guam	17%
7	China	15%

Visited Past Year		
1	Europe	21%
2	Hawai'i	21%
3	Korea	12%
4	Singapore	12%
5	Australia	11%
6	China	8%
7	Guam	7%

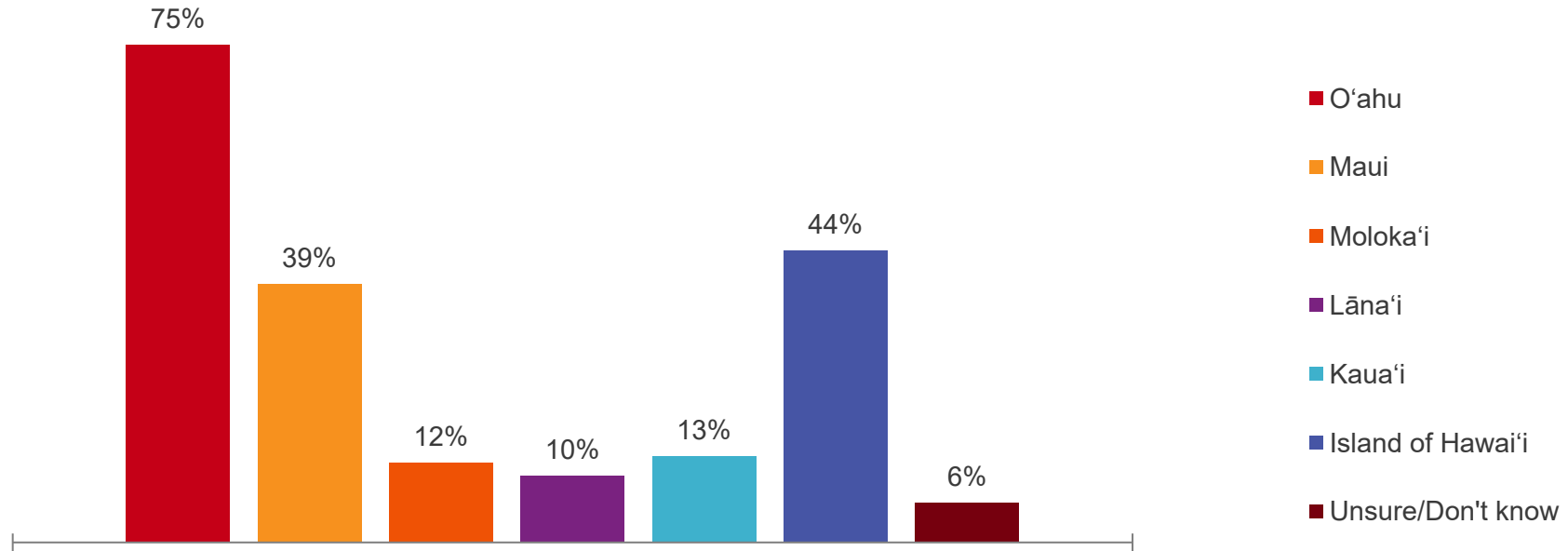
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	33%
2	Australia	31%
3	Hawai'i	31%
4	Taiwan	29%
5	Singapore	23%
6	Thailand	17%
7	Guam/Saipan	16%
8	Hong Kong	16%
9	Korea	15%
10	China	10%

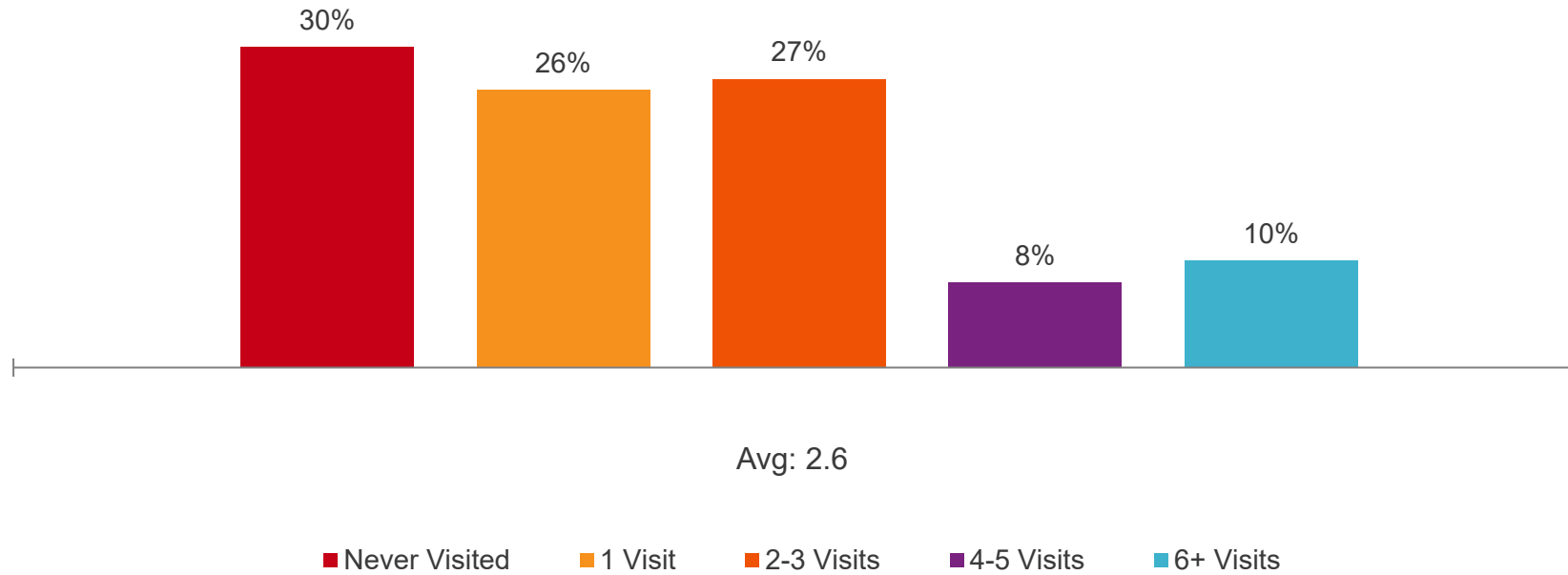
Interested Next 24 Months		
1	Europe	50%
2	Hawai'i	47%
3	Australia	46%
4	Singapore	29%
5	Guam	24%
6	Korea	14%
7	China	12%

Planning Next 12 Months		
1	Europe	24%
2	Hawai'i	24%
3	Australia	20%
4	Singapore	11%
5	Guam	9%
6	Korea	7%
7	China	5%

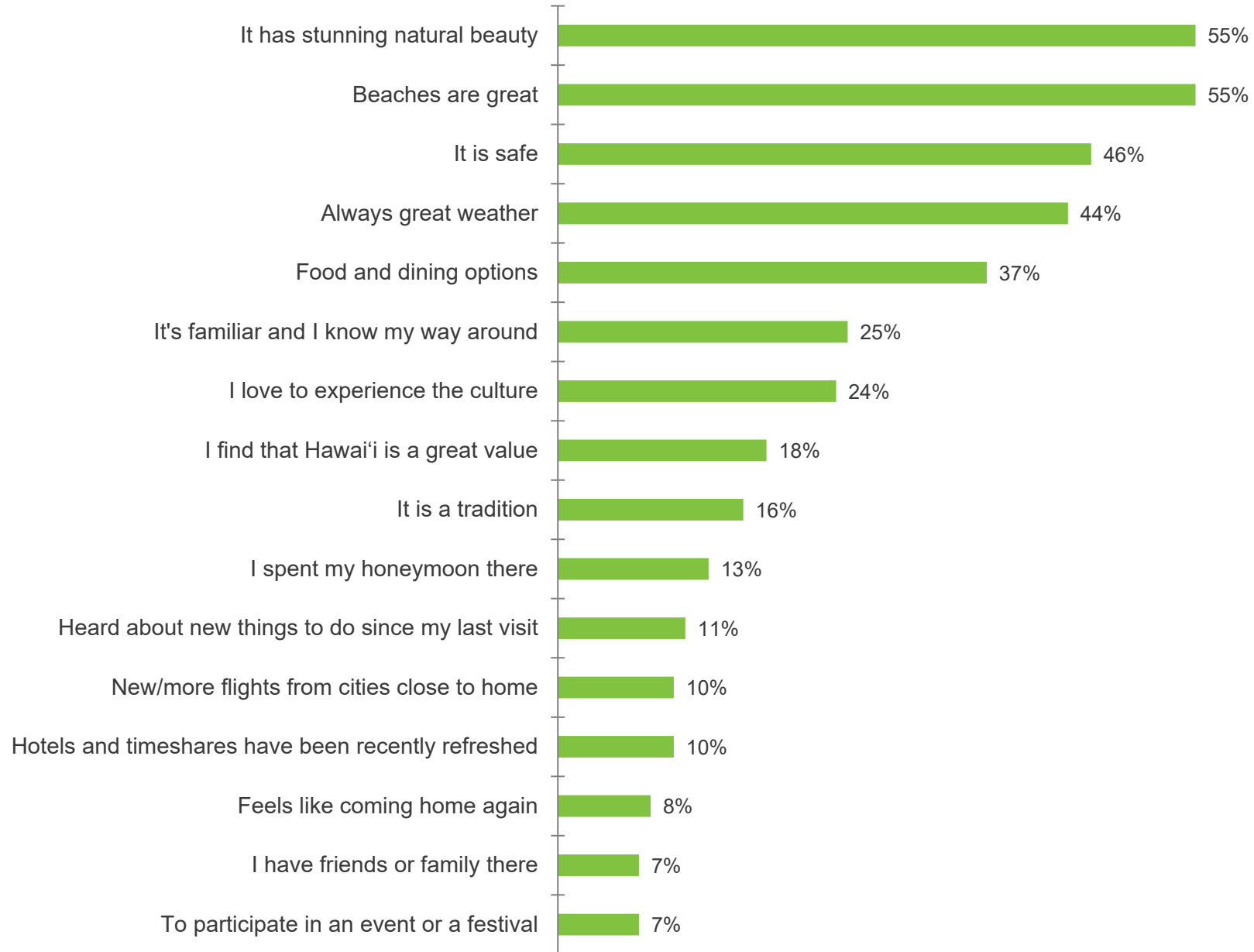
Hawaiian Islands Plan to Visit Next 12 Months



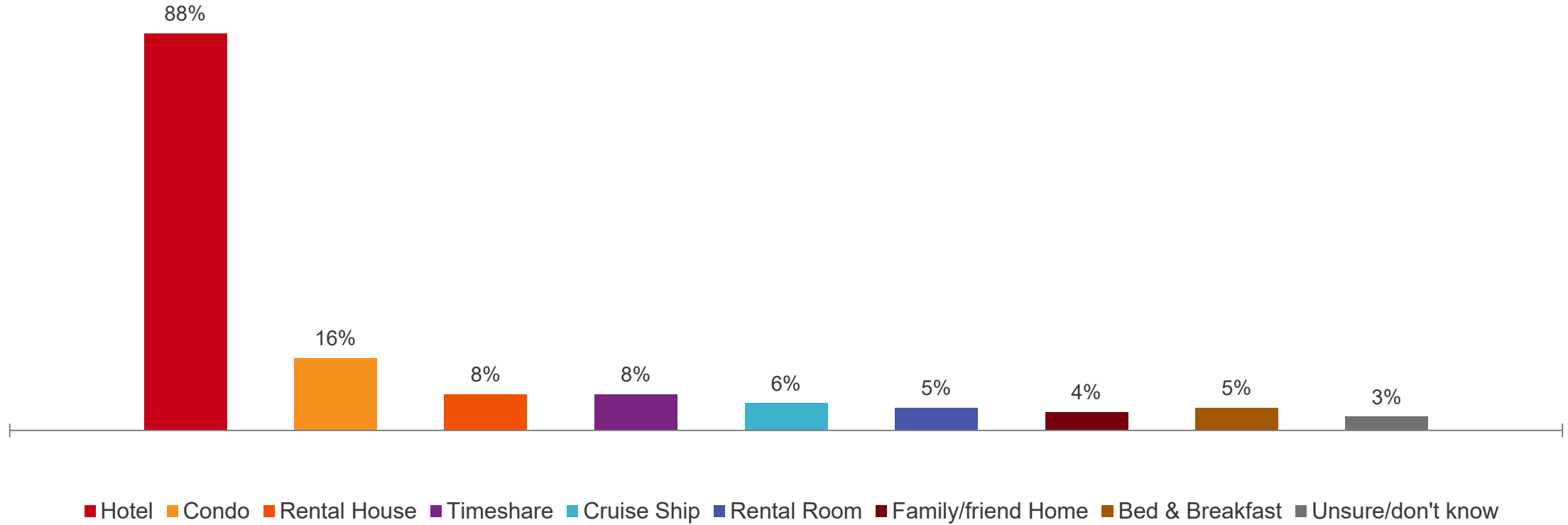
Number of Times Visited Hawai'i in Lifetime



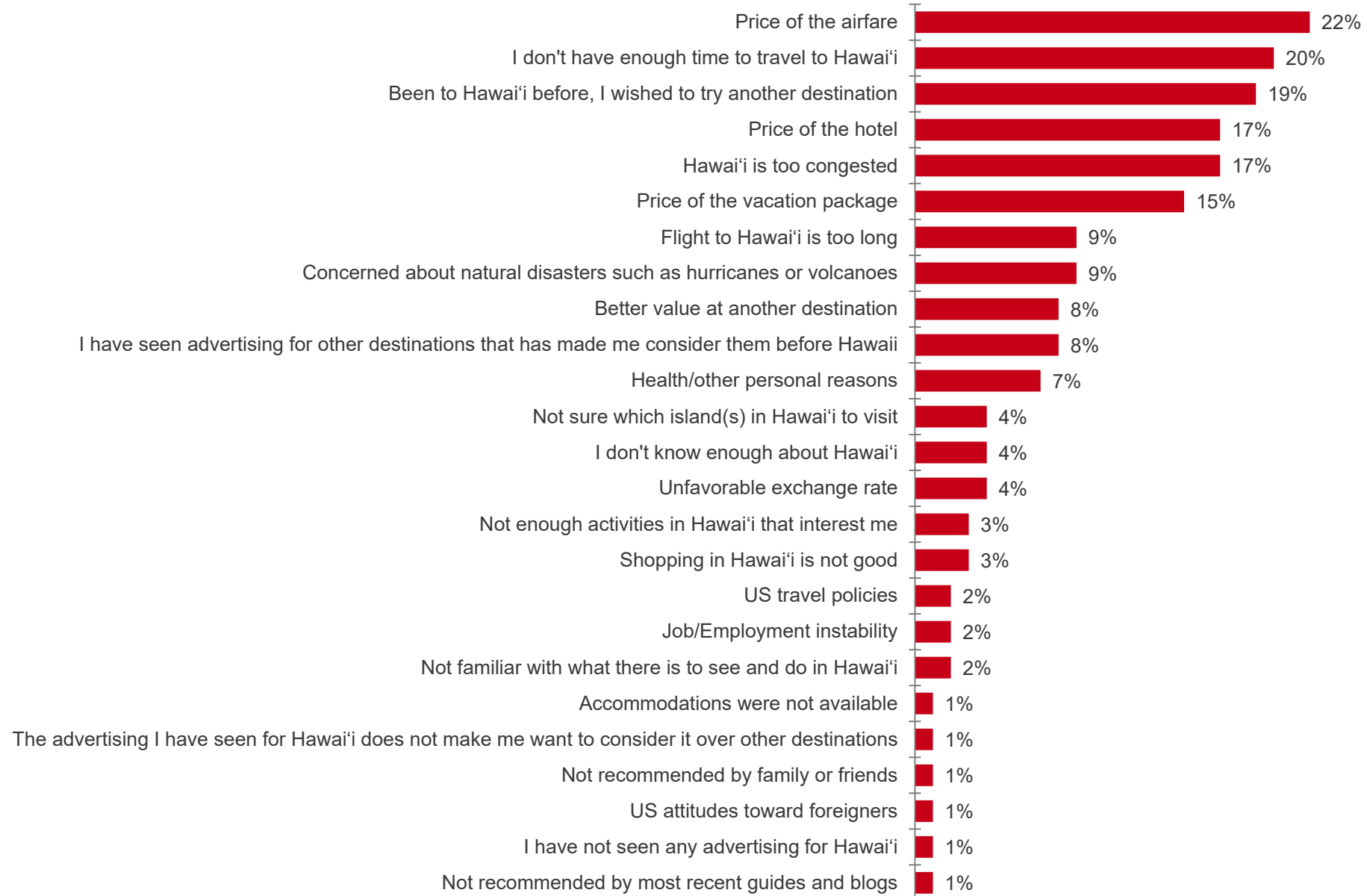
Reasons for Returning to Hawai'i



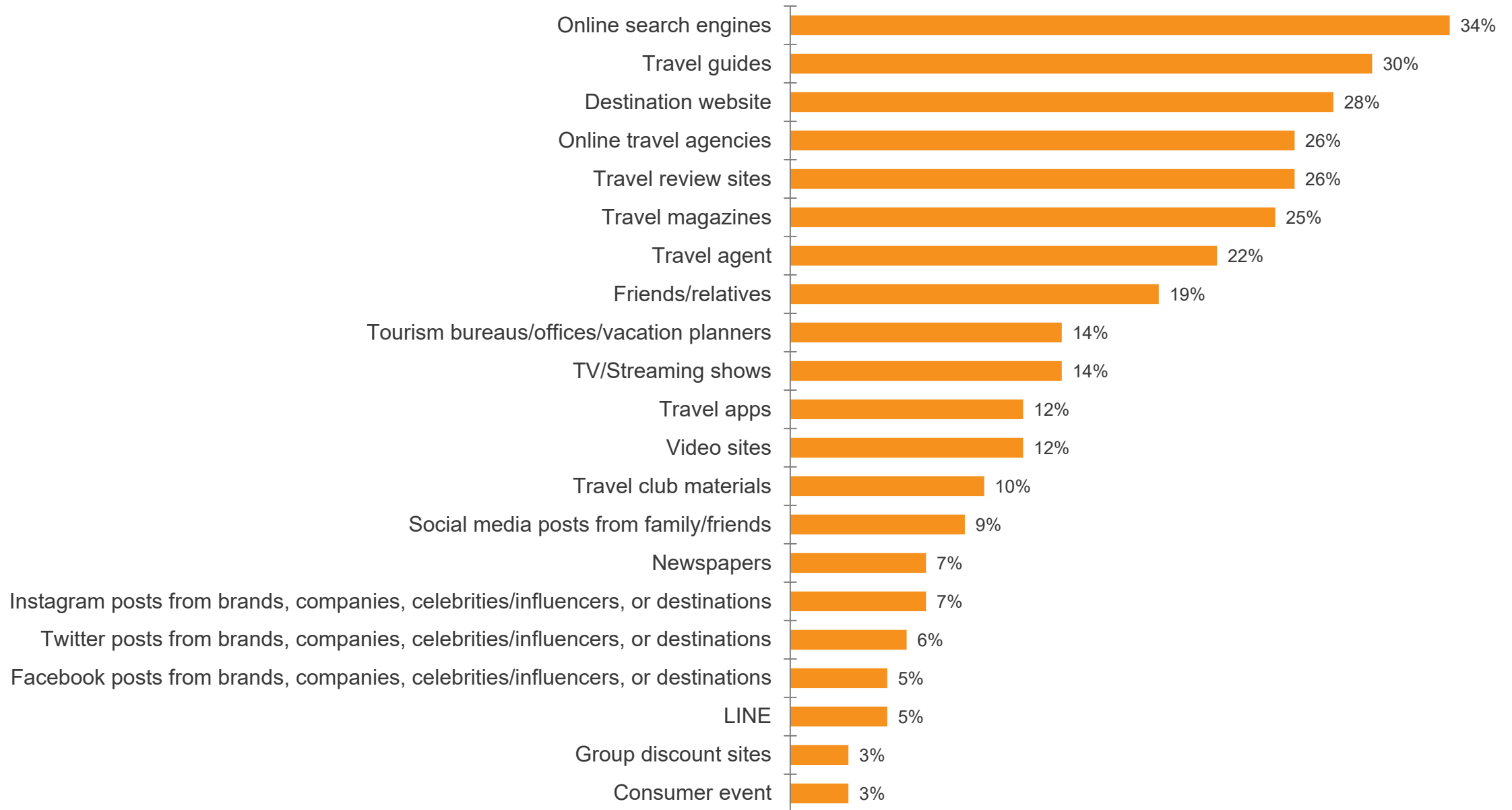
Hawai'i Planned Accommodations



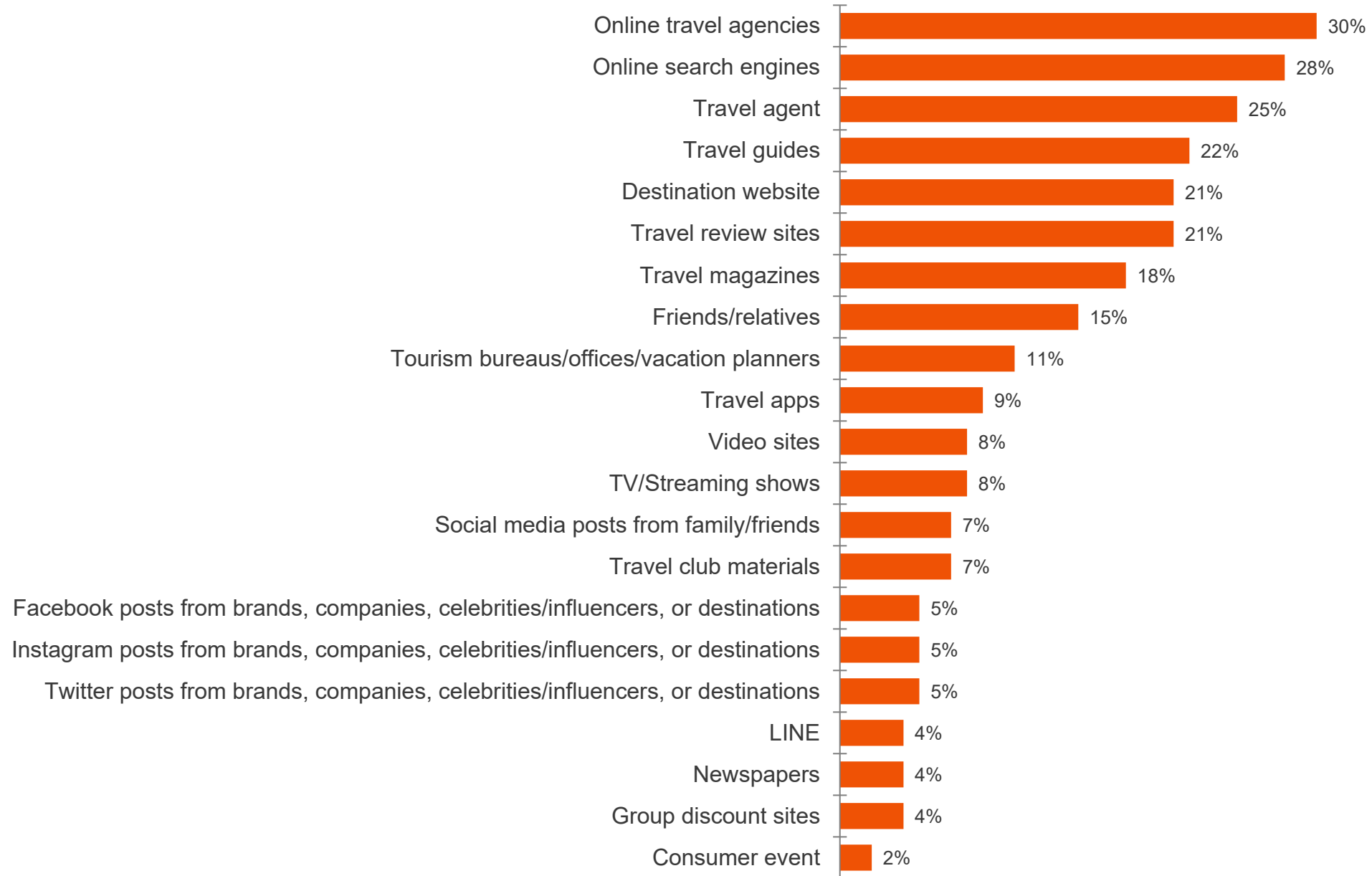
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



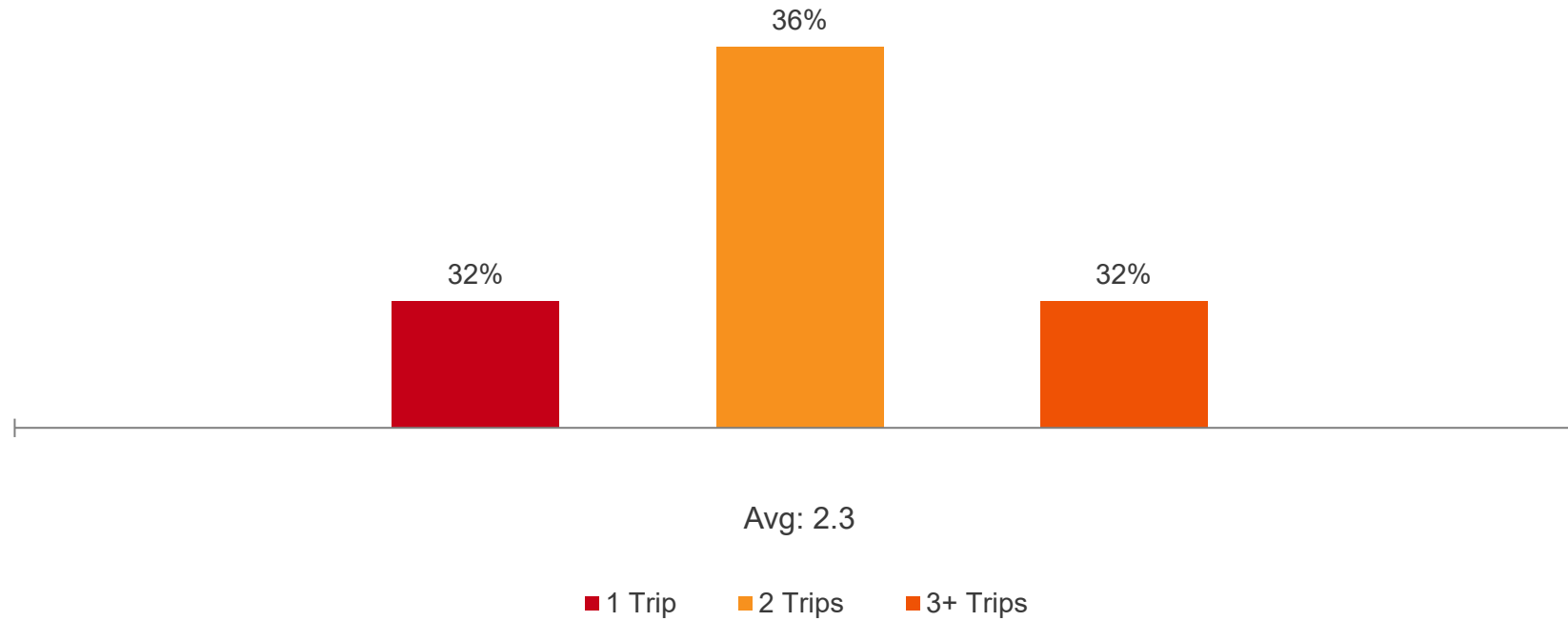
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Summary of Markets – Korea

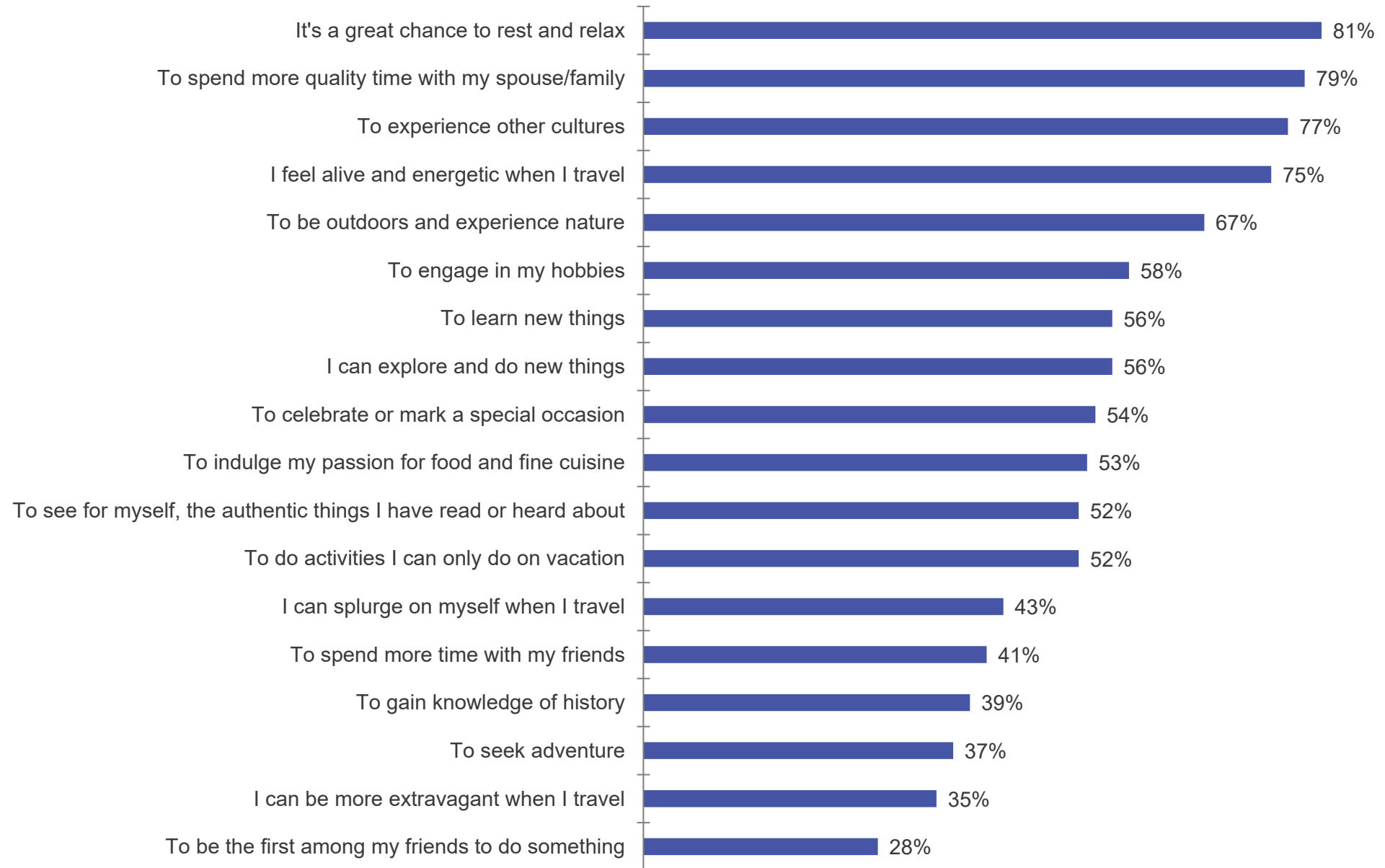
Demographics by Market

	Korea
<i>Base:</i>	1,202
Gender	
Male	60%
Female	40%
Marital Status	
Single	27%
Married	69%
Employment	
Full Time Employed	80%
Retired	4%
Education Level	
Graduated College	88%
Children in Household (1+)	
Children at Home	48%
Age	
18-24	3%
25-34	23%
35-44	30%
45-54	25%
55-64	16%
65+	3%
Average	43.2
Household Income	
Under ₩80M	69%
₩80M - ₩110M	22%
₩110M - ₩160M	6%
₩160M+	3%
Average	71,593,178 KRW

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Southeast Asia	56%
2	Japan	55%
3	China	31%
4	Europe	24%
5	USA	19%
6	Australia	15%
7	Hawai'i	12%
8	Maldives	4%

Visited Past Year		
1	Japan	40%
2	Southeast Asia	38%
3	China	16%
4	Europe	14%
5	USA	11%
6	Australia	8%
7	Hawai'i	6%
8	Maldives	2%

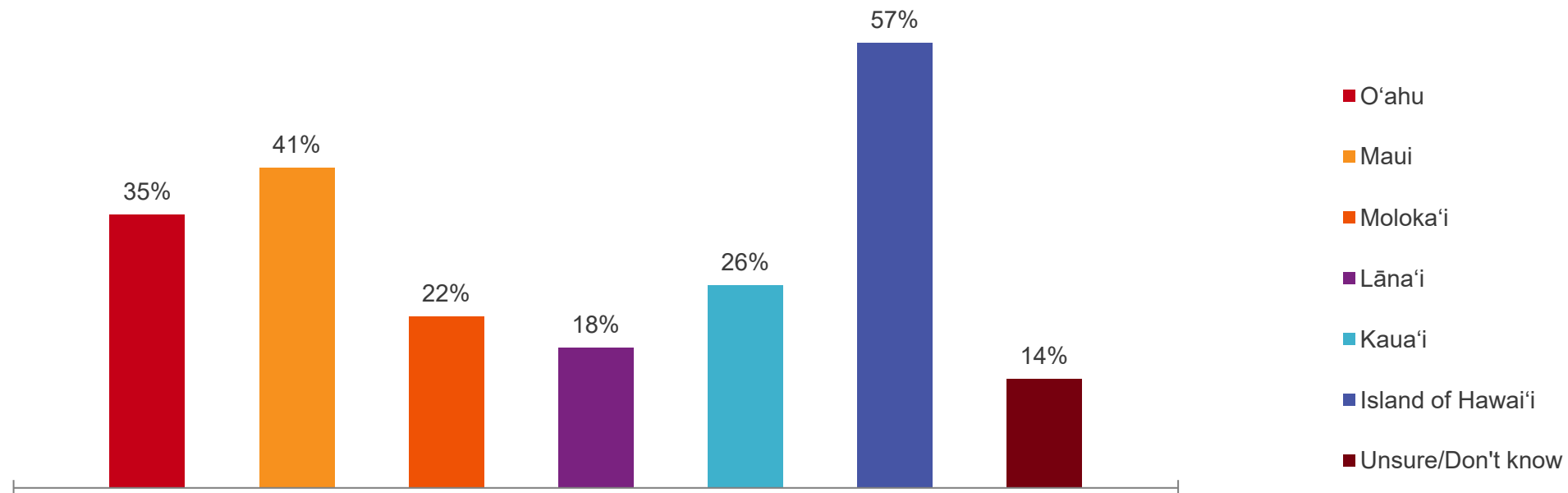
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Southeast Asia	48%
2	Europe	37%
3	Japan	37%
4	Australia	31%
5	USA	26%
6	Hawai'i	25%
7	Guam/Saipan	24%
8	Maldives	16%

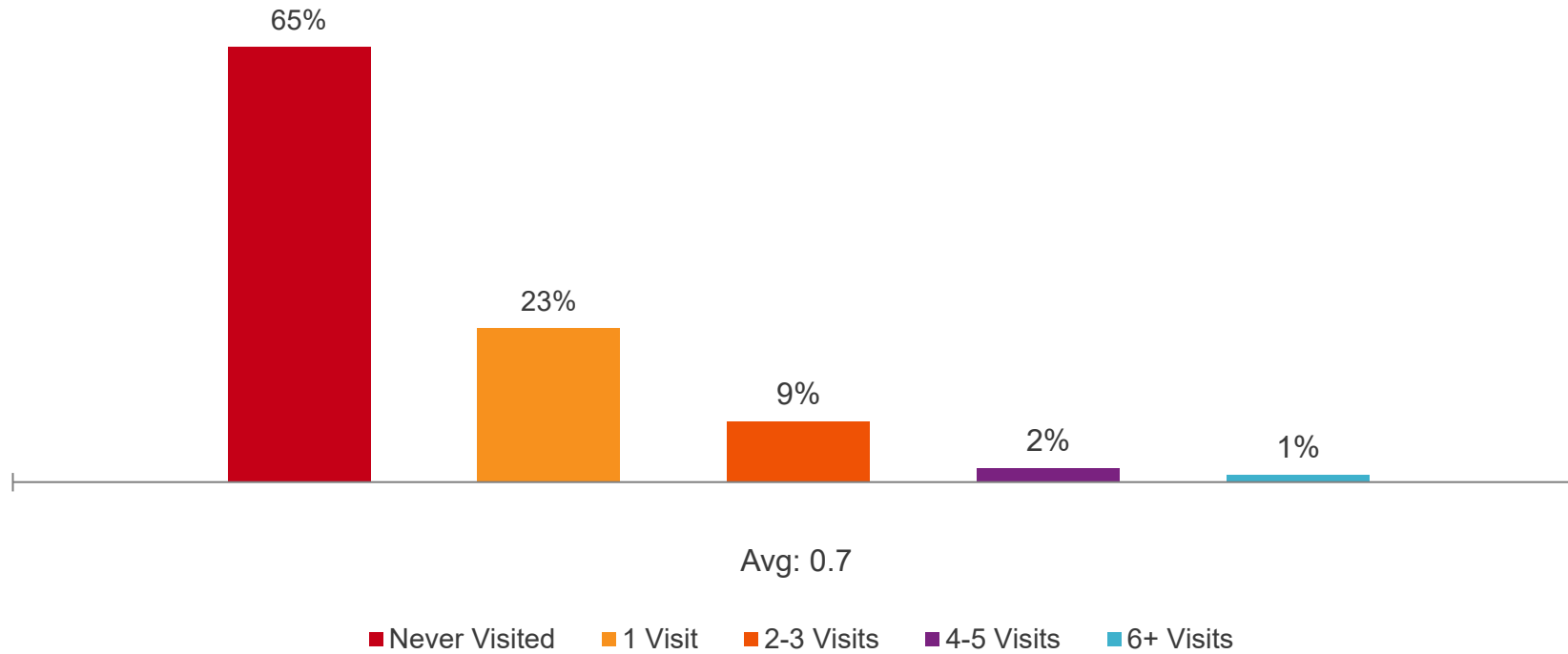
Interested Next 24 Months		
1	Europe	45%
2	Southeast Asia	41%
3	Australia	35%
4	Hawai'i	35%
5	USA	29%
6	Japan	27%
7	Maldives	20%
8	China	15%

Planning Next 12 Months		
1	Southeast Asia	31%
2	Europe	25%
3	Australia	20%
4	Japan	20%
5	Hawai'i	18%
6	USA	14%
7	Maldives	9%
8	China	8%

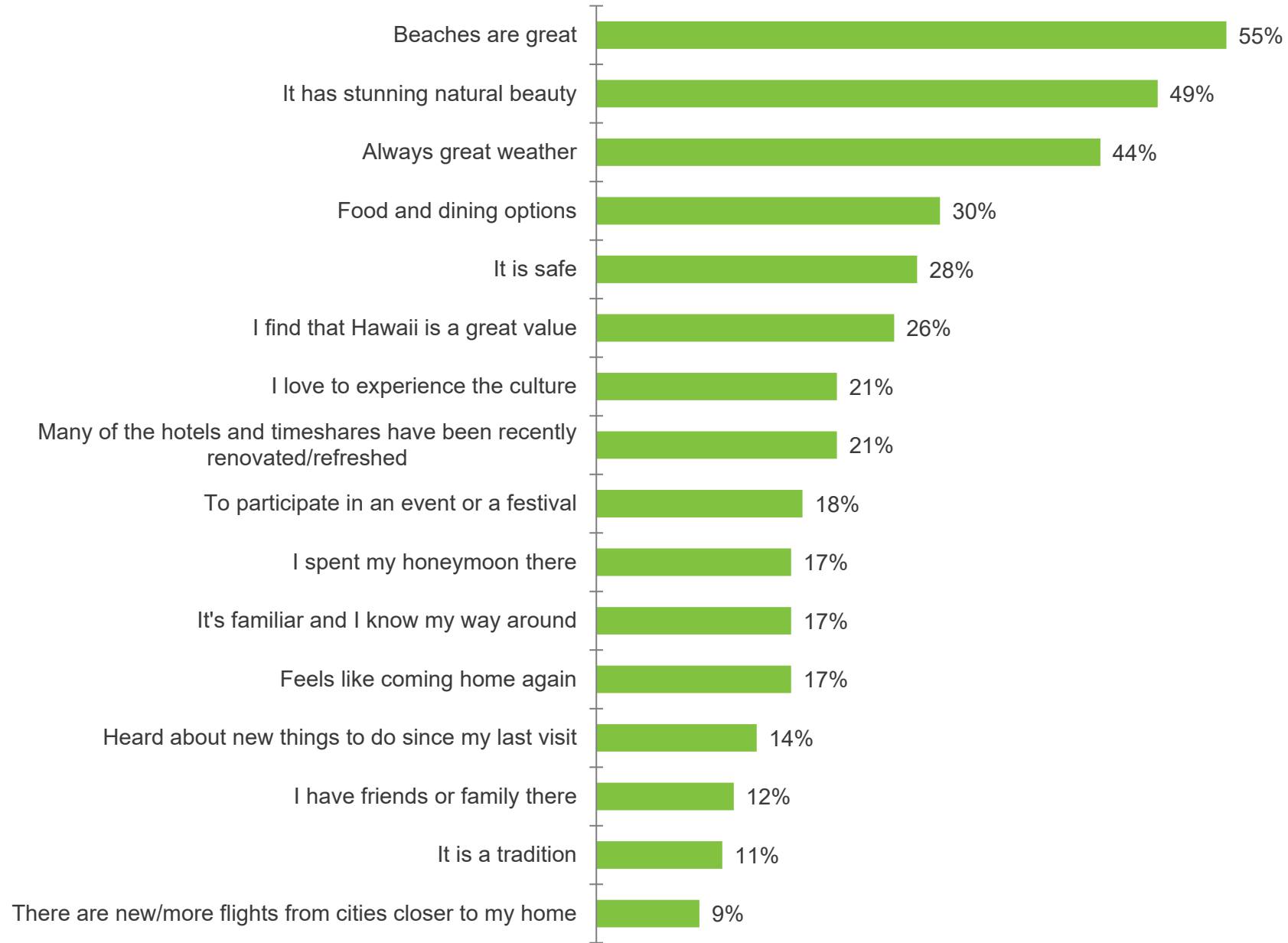
Hawai'i Islands Plan to Visit Next 12 Months



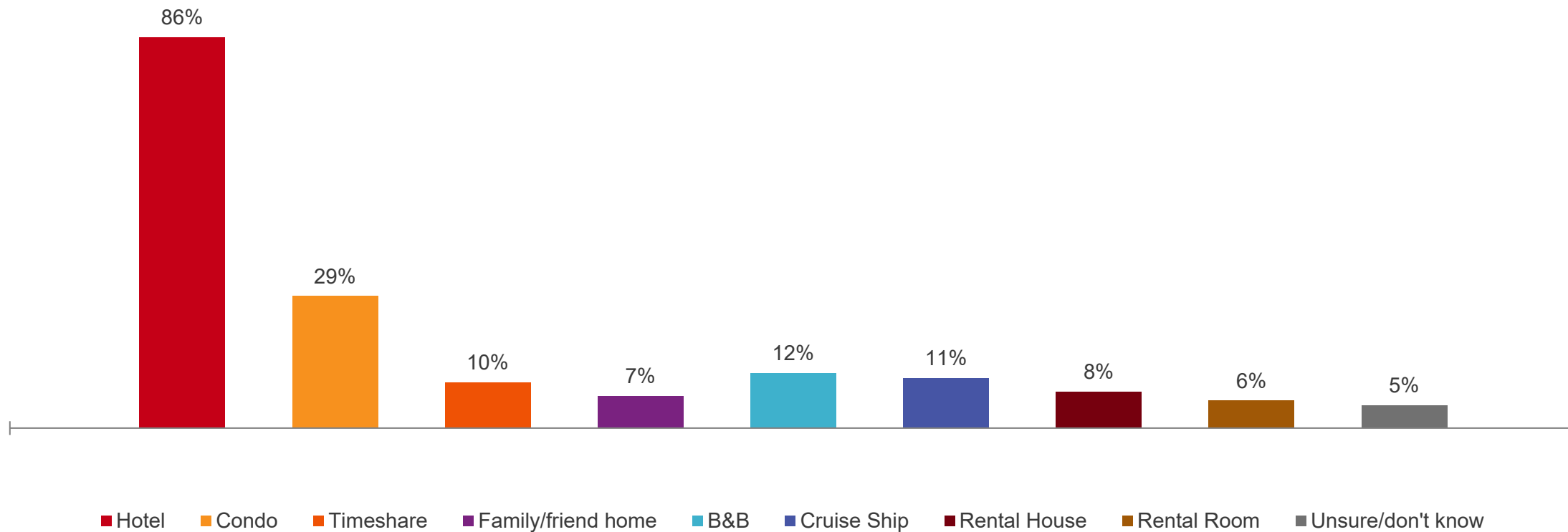
Number of Times Visited Hawai'i in Lifetime



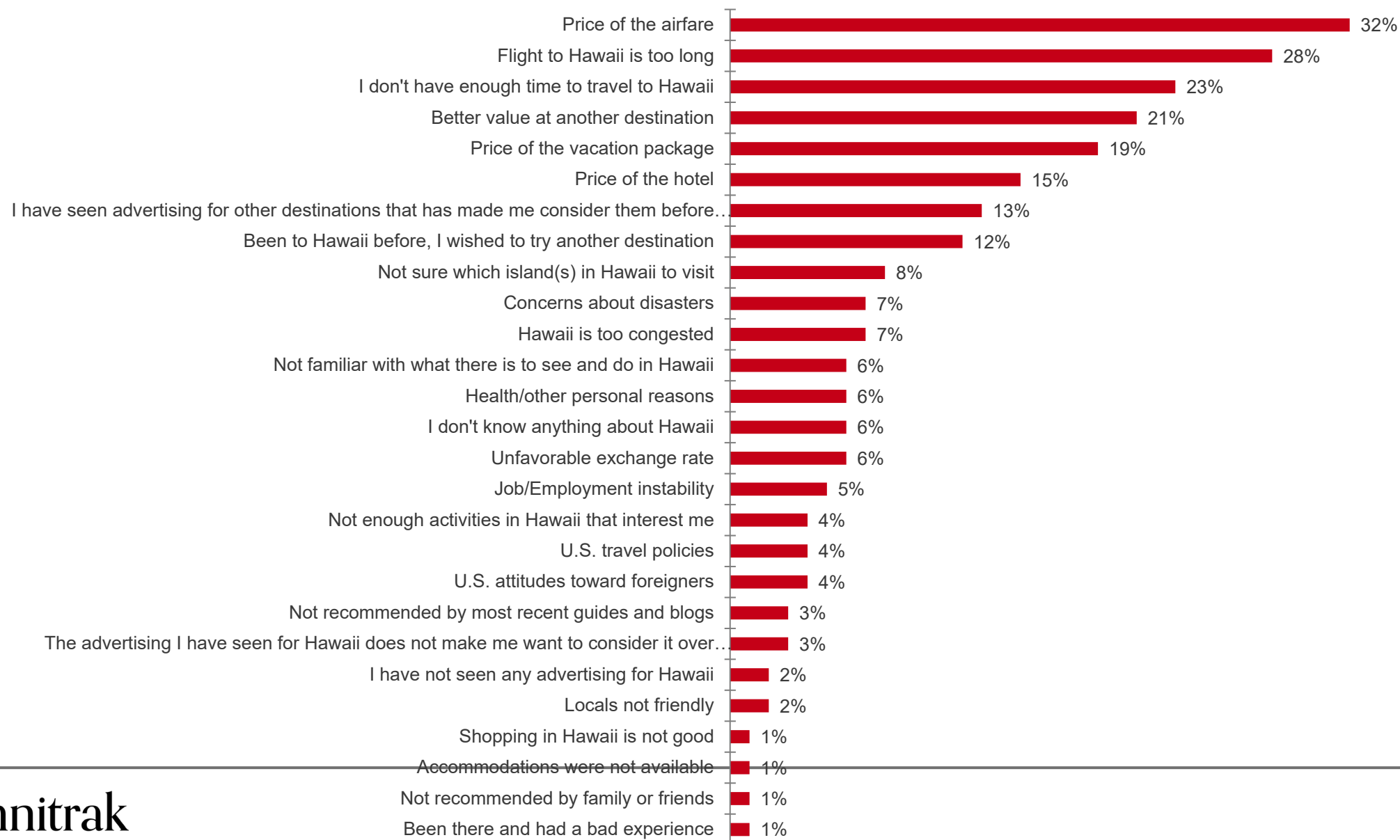
Reasons for Returning to Hawai'i



Hawai'i Planned Accommodations



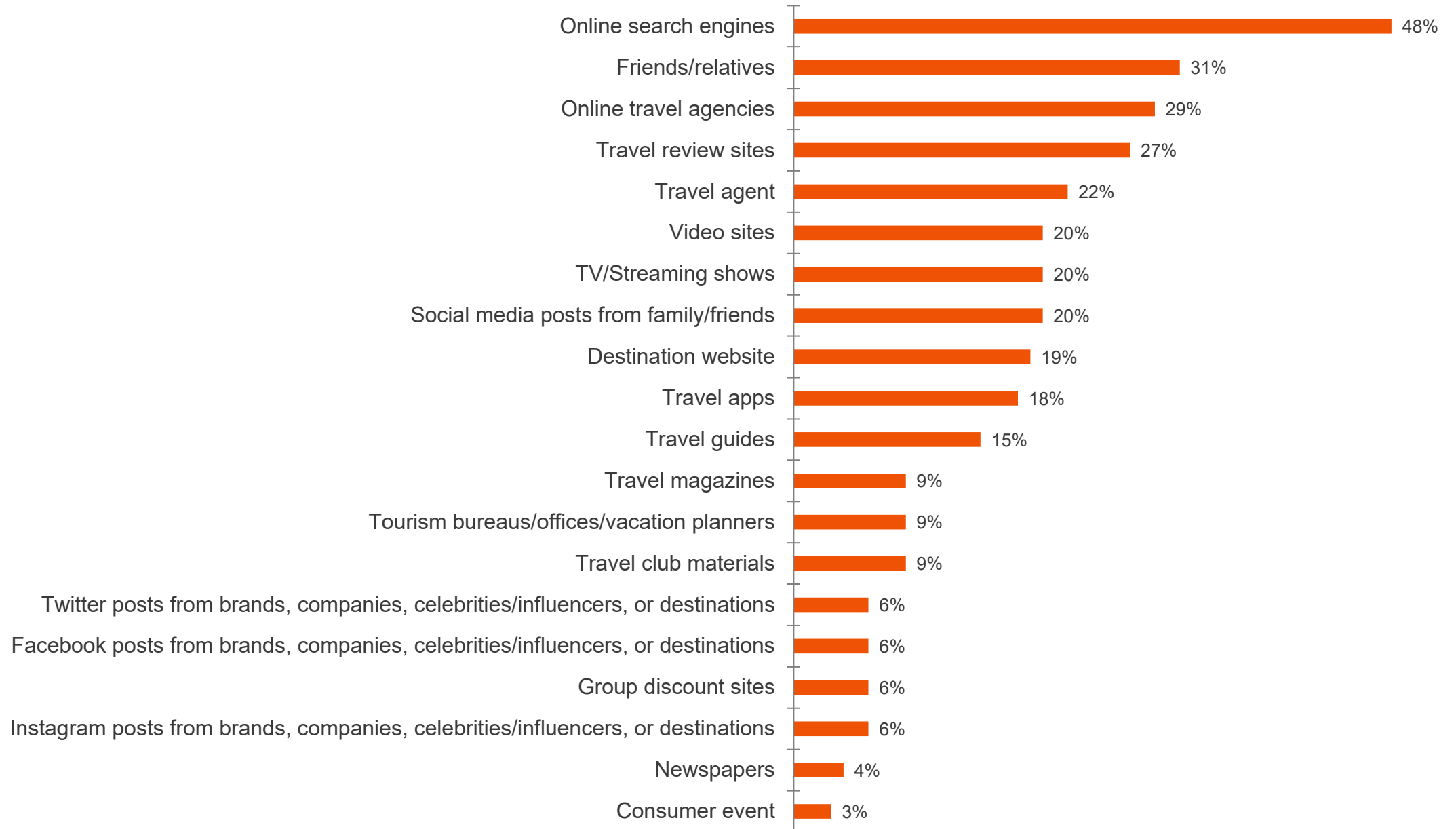
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



7

Methodology

Methodology

Target Audience/Markets

- Random sample of US, Canada, Japan, and Korea residents
- US: 2,400 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - US West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - US East includes all continental states not in US West region
- Canada: 1,200 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher
- Japan: 1,200 sample
 - Traveled internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher (~\$40,000 USD)
- Korea: 1,200 sample
 - Traveled internationally for leisure in past 24 months with household income of 30,000,000 or higher (~\$26,000 USD)

Timeframe

- Wave 1 & 2: Data for media coverage between January 2018 – December 2018

Survey Methodology

- Online surveys taken by LSR panelists