

Hawai'i Tourism Authority

Marketing Effectiveness Study

July – December 2019

Wave 4 Report

External



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Executive Highlights – North America Travel Characteristics

U.S. West & U.S. East

- **Reasons for Vacationing:** Both U.S. West (USW) and U.S. East (USE) residents are more likely to take a vacation to explore and do new things, spend quality time with their spouse/family, and rest and relax,
- **Previous Hawai'i Visits:** Half of USW residents (48%) have visited Hawai'i in the past three years, more than any other competitor destination. Hawai'i ranks as sixth most visited destination for USE residents (18%), falling far behind major competitors like Florida (62%), California (35%), and the Caribbean (39%).
- **Future Hawai'i Visits:** Among destinations USW residents are interested in visiting in the next two years, Hawai'i places well ahead of all other destinations at 56 percent. For USE residents, 44 percent say they are considering Hawai'i in the next two years, only behind Florida (45%).
- **Future Island Visits:** For those planning to visit Hawai'i in the next year, more than half of U.S. residents (60%) plan to go to Maui, while 43 percent are planning to visit O'ahu, 38 percent plan to go to Island of Hawai'i, and 33 percent intend to go Kaua'i.
- **Never Been's:** USE residents are much more likely to have never visited Hawai'i before (48%), while 23 percent have visited just once. Two thirds of USW residents have visited more than twice. Only 17 percent of USW residents have never visited Hawai'i.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches 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, both USW and USE residents are most likely to use hotels, followed distantly by rental houses.
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the coronavirus outbreak is the top reason not to visit, followed by the price of airfare/vacation packages/hotel.

Canada

- **Reasons for Vacationing:** Canadians see vacations as a time to rest and relax, explore/do new things, and spend quality time with their spouse/family.
- **Previous Hawai'i Visits:** Just 12 percent of Canadian residents have visited Hawai'i in the past three years, falling seventh in the competitive ranking. More than 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 second at 46 percent, below Europe (51%). At the same time, just 13 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, 52 percent plan to go to Maui, while 37 percent intend to visit the Island of Hawai'i and 33 percent plan to go to O'ahu.
- **Never Been's:** More than half of Canadian residents (58%) have never visited Hawai'i before, while 24 percent have visited once and 17 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. Half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, 63 percent plan to stay in a hotel, followed distantly by rental house (28%), cruise ship (14%), and condo (12%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, concerns about coronavirus are the top reason not to visit, followed by the price of vacation packages/airfare/hotel, as well as an unfavorable exchange rate.

Executive Highlights – Japan and Korea Travel Characteristics

Japan

- **Reasons for Vacationing:** Japan residents see vacations as a time to indulge their passion for food and cuisine, to feel alive and energetic, rest and relax, and to experience other cultures.
- **Previous Hawai'i Visits:** One quarter of Japanese residents (27%) have visited Hawai'i in the past three years, ranking third in the competitive set, below Europe (34%) and Okinawa (32%).
- **Future Hawai'i Visits:** Among destinations Japanese are interested in visiting in the next two years, Hawai'i falls in second place at 37 percent, below Europe (42%). One in the (12%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 69 percent plan to go to O'ahu, while 43 percent intend to visit the Island of Hawai'i and 24 percent plan to go to Maui.
- **Never Been's:** One third of Japanese residents (37%) have never visited Hawai'i before, while 23 percent have visited once and 39 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, beaches, great 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, 67 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, concerns about coronavirus, U.S. travel policies, price of airfare/vacation package, and not having enough time are among the top travel barriers.

Korea

- **Reasons for Vacationing:** Korean residents see vacations as a chance to rest/relax, experience other cultures, to spend quality time with spouse/family, and feel alive and energetic.
- **Previous Hawai'i Visits:** Over one in ten Korean residents (14%) 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 second at 38 percent, following Europe. One fifth (22%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 47 percent plan to go to the Island of Hawai'i, while 37 percent intend to visit Maui, and 27 percent plan to go to O'ahu.
- **Never Beens:** One third of Korean residents (37%) have never visited Hawai'i before, while 49 percent have visited once.
- **Reasons for Returning:** Great beaches, stunning natural beauty, great weather, and culture are among the top reasons why Koreans continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 82 percent plan to stay in a hotel, followed distantly by condos (24%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, concerns about corona virus, the price of airfare, the flight being too long, and better value elsewhere are among the top travel barriers.

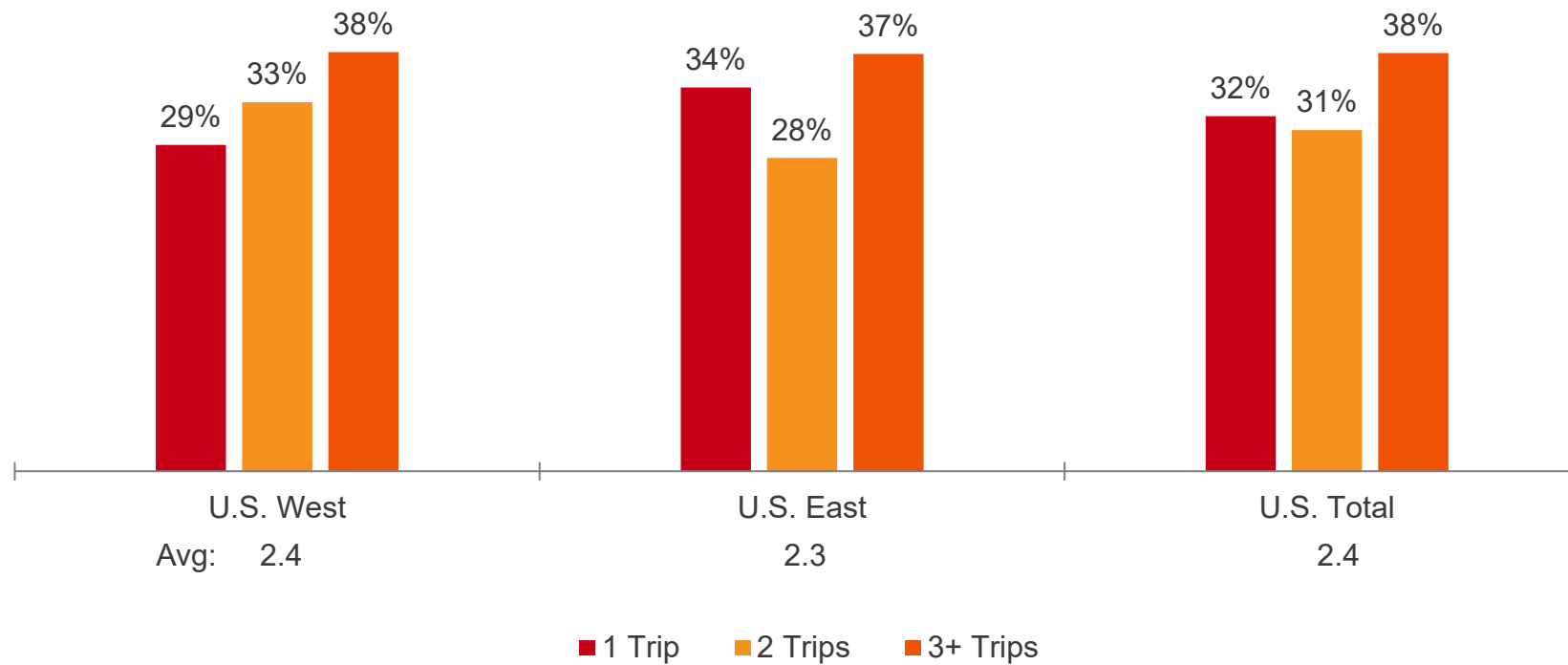
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Summary of Market – U.S.

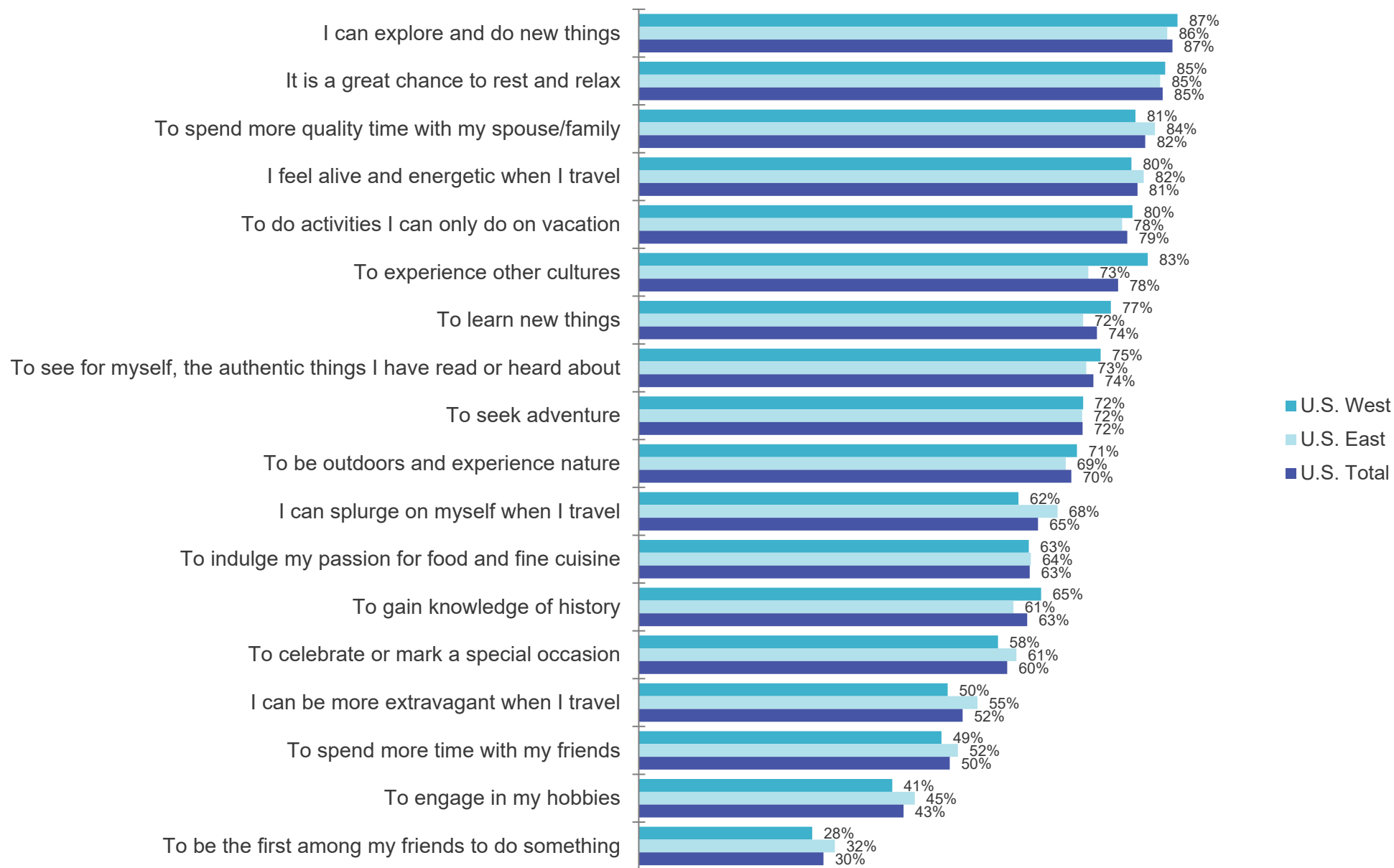
Demographics by Market

	U.S. West	U.S. East	U.S. Total
<i>Base:</i>	601	601	1202
Gender			
Male	49%	49%	49%
Female	51%	51%	51%
Marital Status			
Single	20%	19%	19%
Married	64%	67%	66%
Employment			
Full Time Employed	59%	63%	61%
Retired	16%	16%	16%
Education Level			
Graduated College (Bachelor or higher)	75%	74%	75%
Race/Ethnicity			
White	69%	82%	76%
Black/African America	2%	5%	3%
Asian/Pacific Islander	22%	12%	17%
Hispanic/Latino	10%	4%	7%
Children in Household (1+)			
Children at Home	45%	42%	44%
Age			
18-24	10%	13%	11%
25-34	19%	18%	18%
35-44	19%	18%	18%
45-54	19%	19%	19%
55-64	16%	15%	15%
65+	18%	17%	17%
Average	46.5	45.2	45.9
Household Income			
\$75,000 - \$99,999	33%	34%	34%
\$100,000 - \$149,999	39%	41%	40%
\$150,000+	27%	24%	26%
Average	\$127,475	\$125,416	\$126,445

Number of Leisure Trips Taken in Past 12 Months

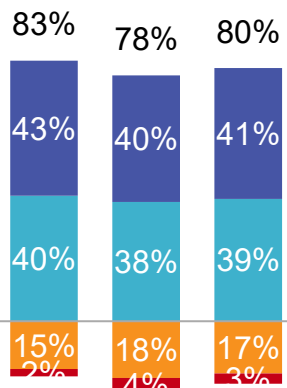


Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



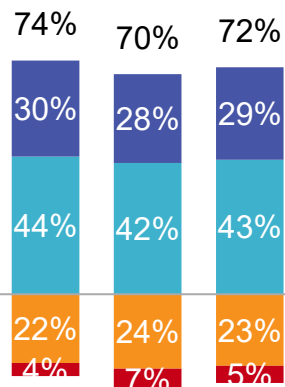
Sustainable Travel

I feel personal responsibility to take care of the places I visit



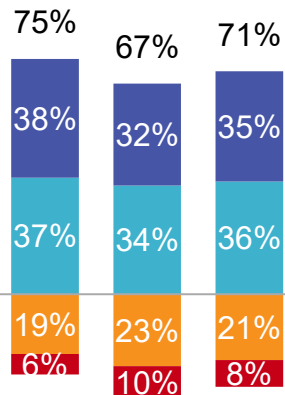
U.S. West U.S. East U.S. Total

I seek out meaningful experiences with the local population in the places I visit



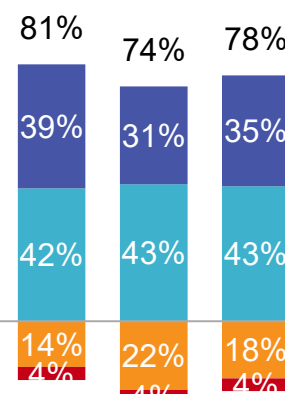
U.S. West U.S. East U.S. Total

I practice 'leave no trace' when traveling to protect the environment



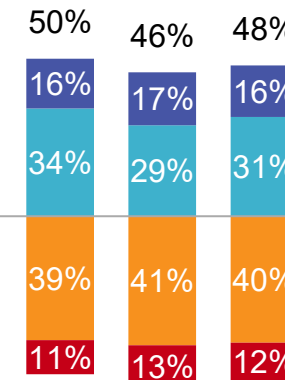
U.S. West U.S. East U.S. Total

I prefer to shop at local markets and/or make purchases from local artisans and craftspeople while traveling



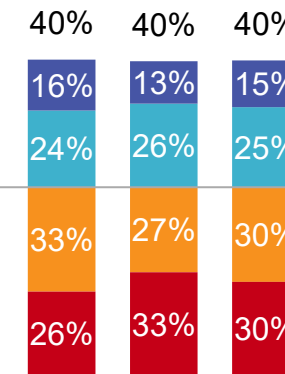
U.S. West U.S. East U.S. Total

I prefer to stay in accommodations with Green standards or accreditations



U.S. West U.S. East U.S. Total

When possible, I will take public transport instead of a car or plane while traveling, to reduce my carbon footprint



U.S. West U.S. East U.S. Total

Neutral Disagree Somewhat Agree Strongly Agree

Destinations Visited Past 3 Years

U.S. West		
1	Hawai'i	48%
2	Mexico	34%
3	United Kingdom (UK)	20%
4	Caribbean	19%
5	France	18%
6	Italy	18%
7	Alaska	16%
8	South East Asia	15%
9	Other Europe	14%
10	Germany	12%
11	Australia	11%
12	Central/South America	11%
13	Switzerland	7%

U.S. East		
1	Florida	62%
2	California	35%
3	Caribbean	29%
4	Mexico	20%
5	United Kingdom (UK)	19%
6	Hawai'i	18%
7	France	15%
8	Italy	14%
9	Other Europe	12%
10	Central America	12%
11	Puerto Rico	10%
12	Germany	9%
13	South America	9%
14	Switzerland	7%
15	Southeast Asia	6%
16	Bermuda	6%
17	Iceland	6%
18	Cuba	3%

Destinations Visited Past 12 Months

U.S. West		
1	Hawai'i	26%
2	Mexico	16%
3	United Kingdom (UK)	10%
4	Caribbean	9%
5	France	9%
6	South East Asia	8%
7	Italy	7%
8	Alaska	7%
9	Other Europe	7%
10	Germany	5%
11	Central/South America	4%
12	Australia	4%
13	Switzerland	3%

U.S. East		
1	Florida	44%
2	California	19%
3	Caribbean	15%
4	Mexico	10%
5	United Kingdom (UK)	10%
6	Hawai'i	9%
7	Central America	6%
8	Other Europe	6%
9	France	6%
10	South America	5%
11	Italy	5%
12	Puerto Rico	4%
13	Germany	4%
14	South East Asia	4%
15	Switzerland	3%
16	Bermuda	3%
17	Iceland	2%
18	Cuba	1%

Destinations Considering for Next Overnight Vacation

U.S. West		
1	Hawai'i	55%
2	Caribbean	30%
3	Alaska	30%
4	Mexico	28%
5	Italy	27%
6	United Kingdom (UK)	27%
7	Australia	27%
8	France	26%
9	Germany	19%
10	Switzerland	19%
11	Other Europe	17%
12	Central/South America	16%
13	South East Asia	15%

U.S. East		
1	Florida	45%
2	Hawai'i	40%
3	California	35%
4	Caribbean	34%
5	Italy	25%
6	United Kingdom (UK)	25%
7	Mexico	21%
8	France	18%
9	Puerto Rico	16%
10	Switzerland	14%
11	Germany	14%
12	Iceland	14%
13	Central America	13%
14	Other Europe	13%
15	Bermuda	13%
16	South America	11%
17	South East Asia	7%
18	Cuba	5%

Destinations Interested in Visiting Next 24 Months

U.S. West		
1	Hawai'i	56%
2	Australia	35%
3	Italy	34%
4	Alaska	33%
5	Caribbean	31%
6	United Kingdom (UK)	30%
7	France	28%
8	Switzerland	25%
9	Mexico	24%
10	Germany	21%
11	Other Europe	18%
12	South East Asia	17%
13	Central/South America	16%

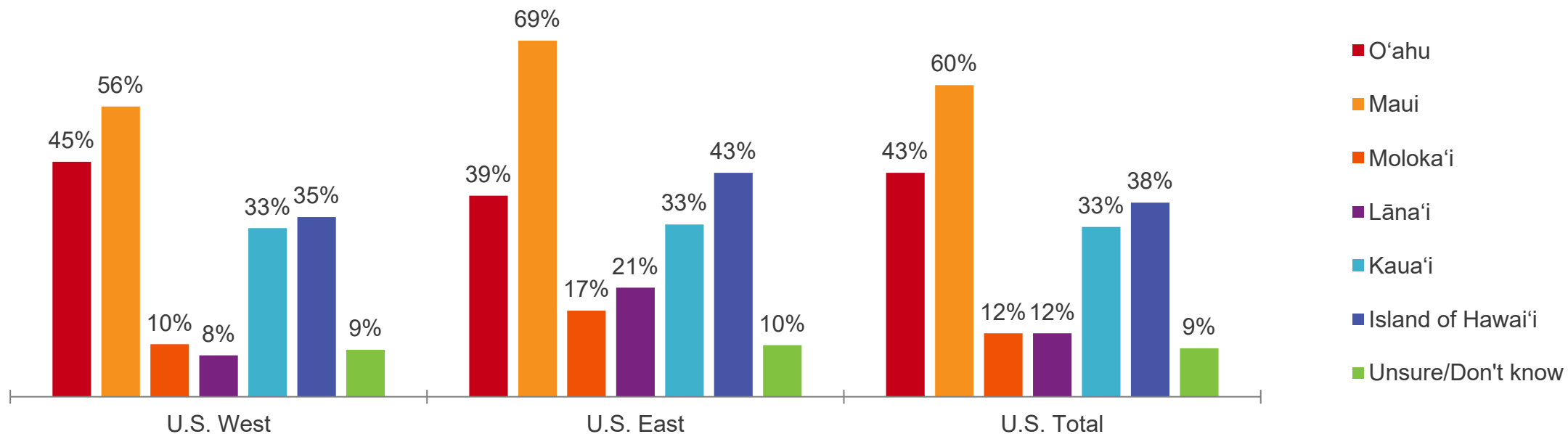
U.S. East		
1	Florida	45%
2	Hawai'i	44%
3	California	37%
4	Caribbean	36%
5	Italy	33%
6	United Kingdom (UK)	29%
7	France	25%
8	Mexico	20%
9	Iceland	19%
10	Switzerland	19%
11	Germany	18%
12	Bermuda	16%
13	Other Europe	16%
14	Puerto Rico	15%
15	Central America	14%
16	South America	13%
17	South East Asia	10%
18	Cuba	8%

Destinations Plan to Visit Next 12 Months

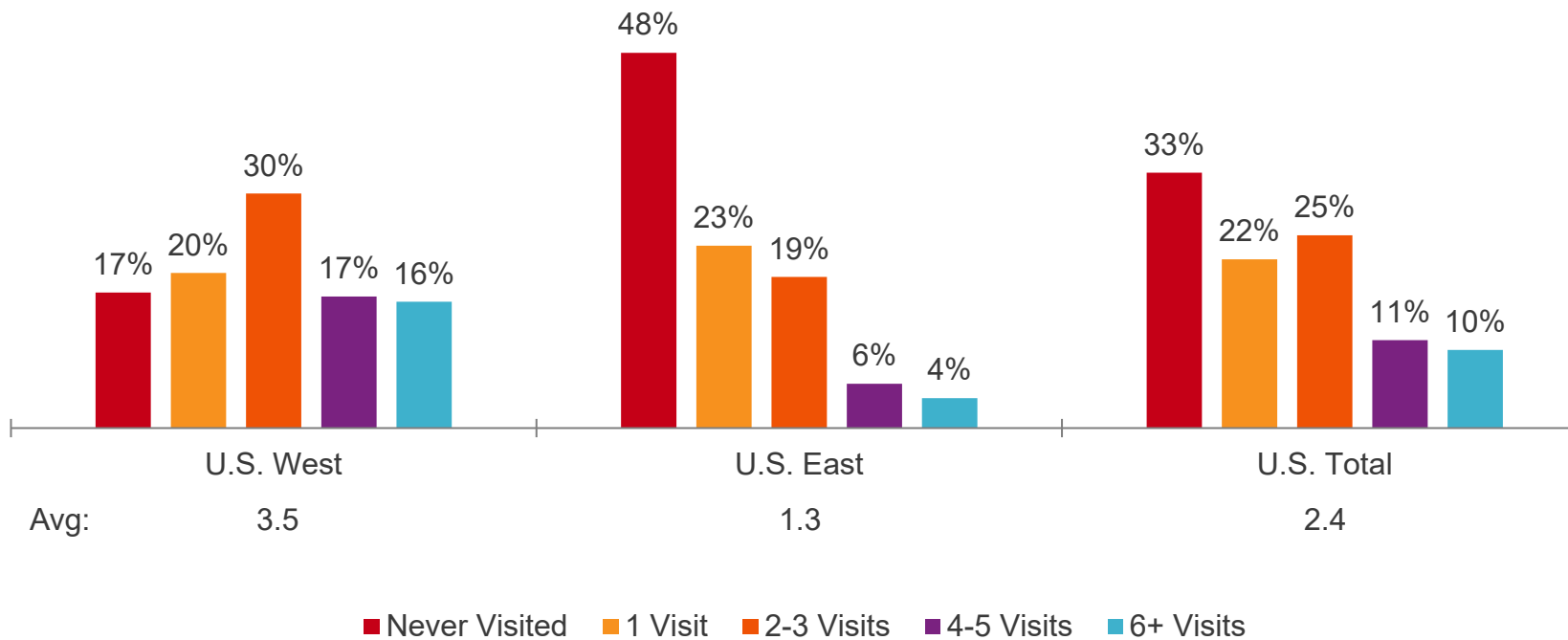
U.S. West		
1	Hawai'i	31%
2	Alaska	13%
3	Caribbean	11%
4	United Kingdom (UK)	11%
5	Mexico	11%
6	France	9%
7	Italy	8%
8	Australia	7%
9	Central/South America	6%
10	Switzerland	6%
11	Germany	5%
12	Other Europe	5%
13	South East Asia	4%

U.S. East		
1	Florida	29%
2	California	15%
3	Caribbean	15%
4	Hawai'i	15%
5	Italy	10%
6	United Kingdom (UK)	10%
7	Mexico	8%
8	France	7%
9	Puerto Rico	6%
10	South America	6%
11	Other Europe	5%
12	Switzerland	5%
13	Central America	4%
14	Iceland	4%
15	Germany	4%
16	Bermuda	4%
17	South East Asia	4%
18	Cuba	1%

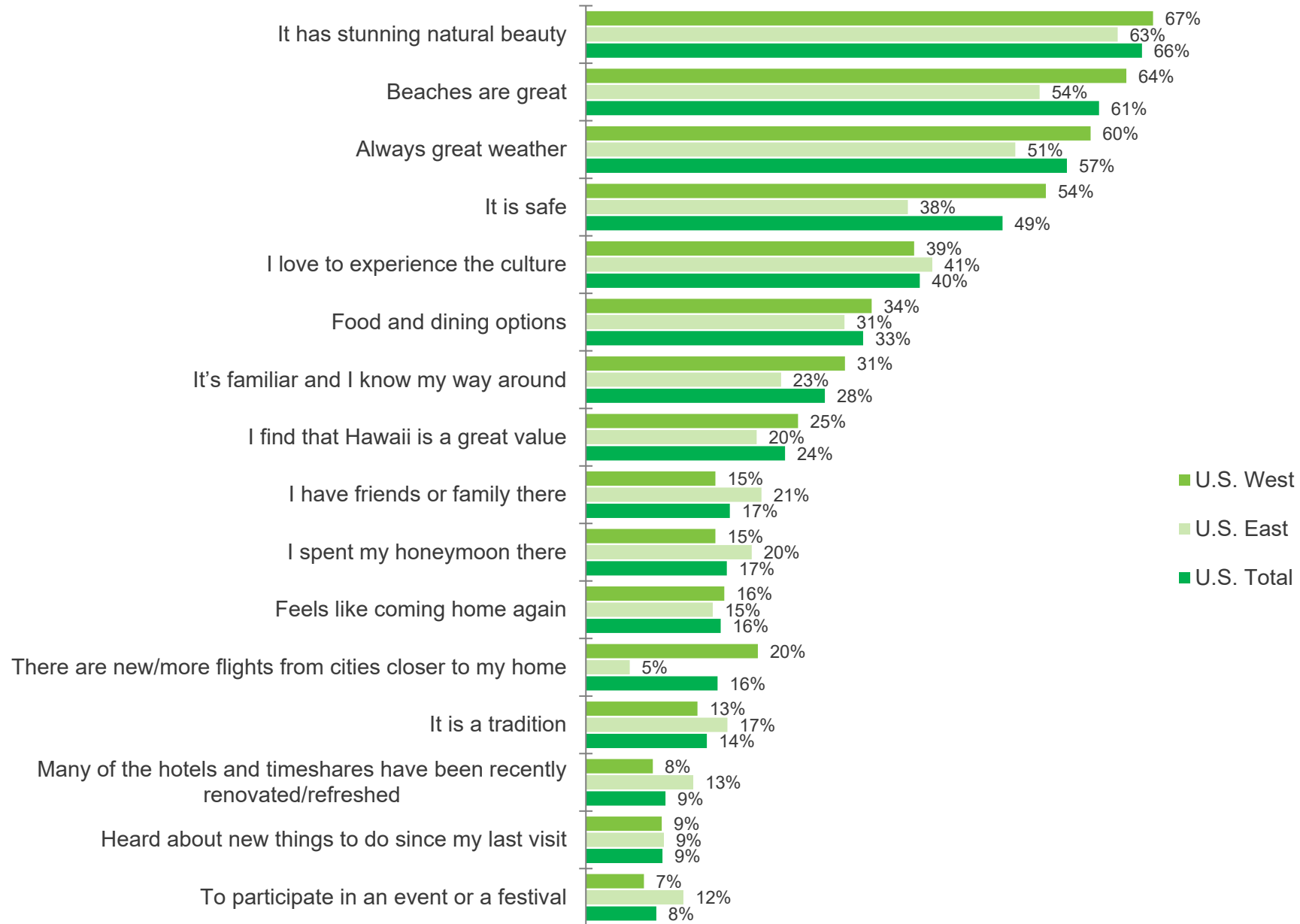
Hawaiian Islands Plan to Visit Next 12 Months



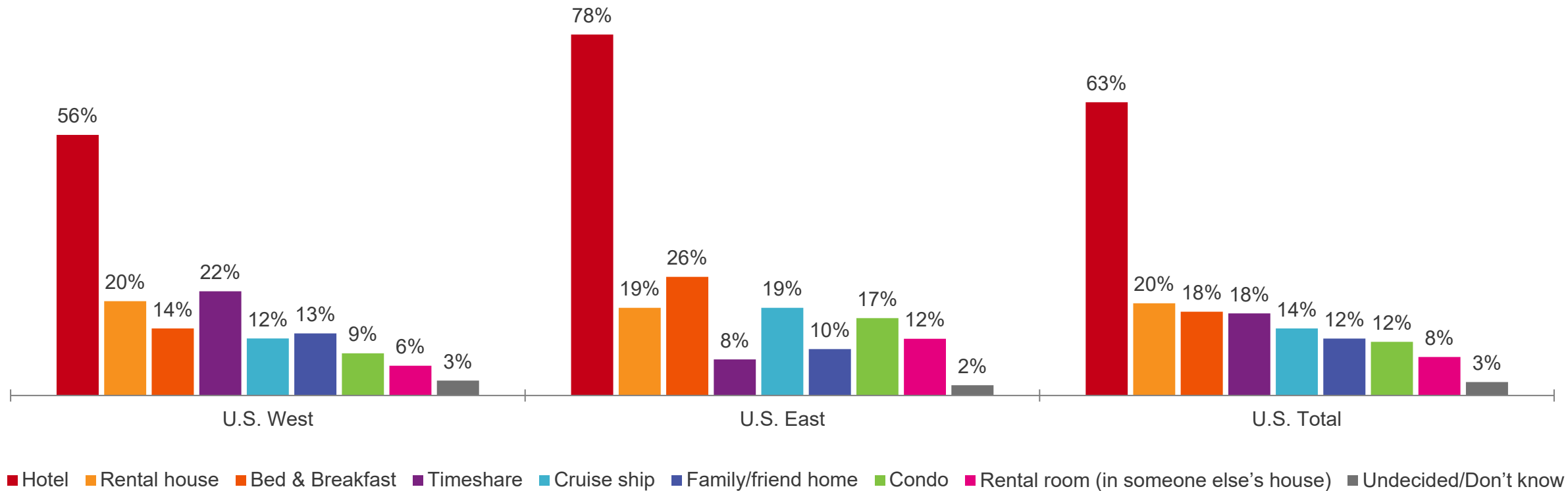
Number of Times Visited Hawai'i in Lifetime



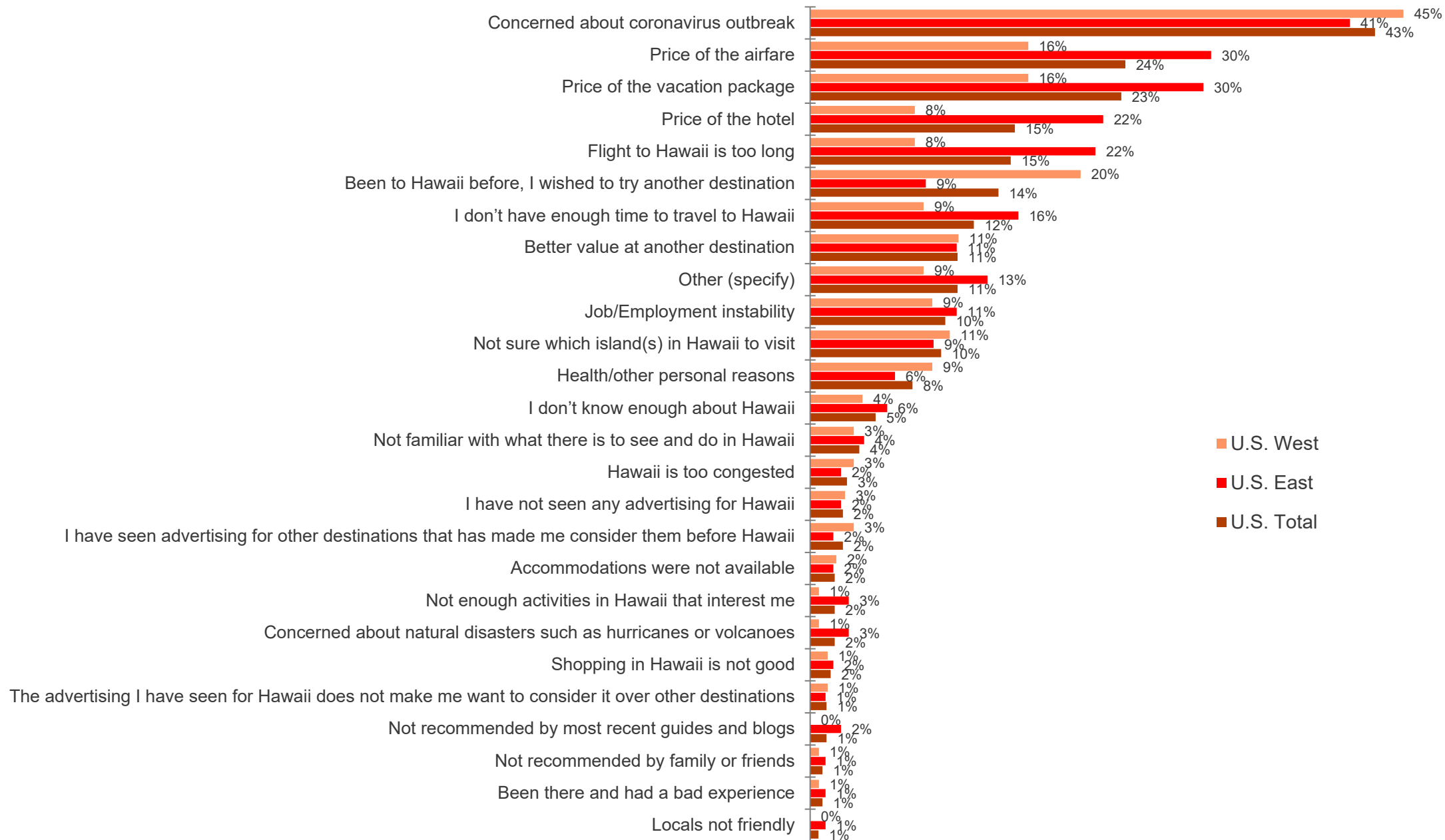
Reasons for Returning to Hawai‘i



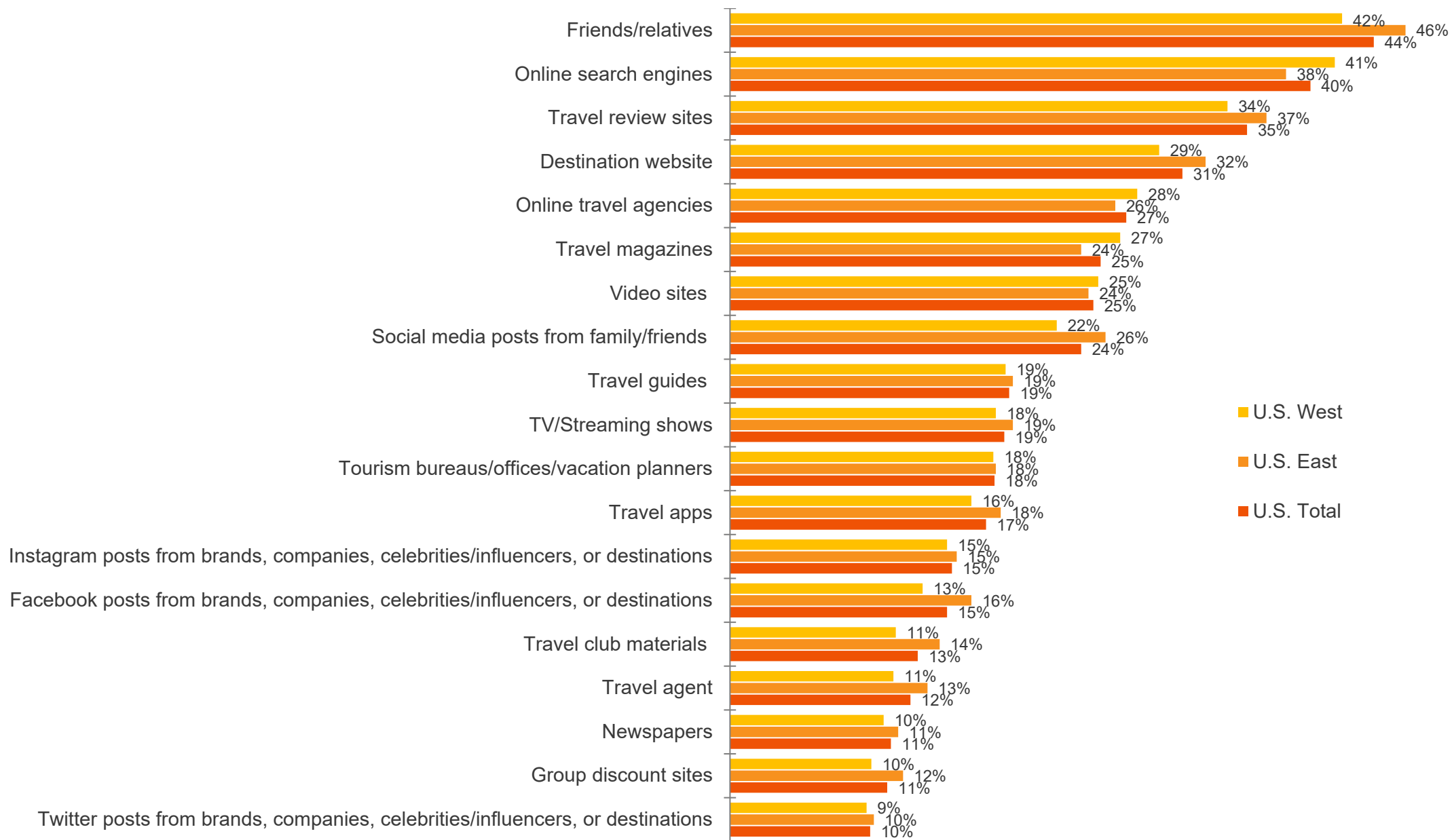
Hawai'i Planned Accommodations



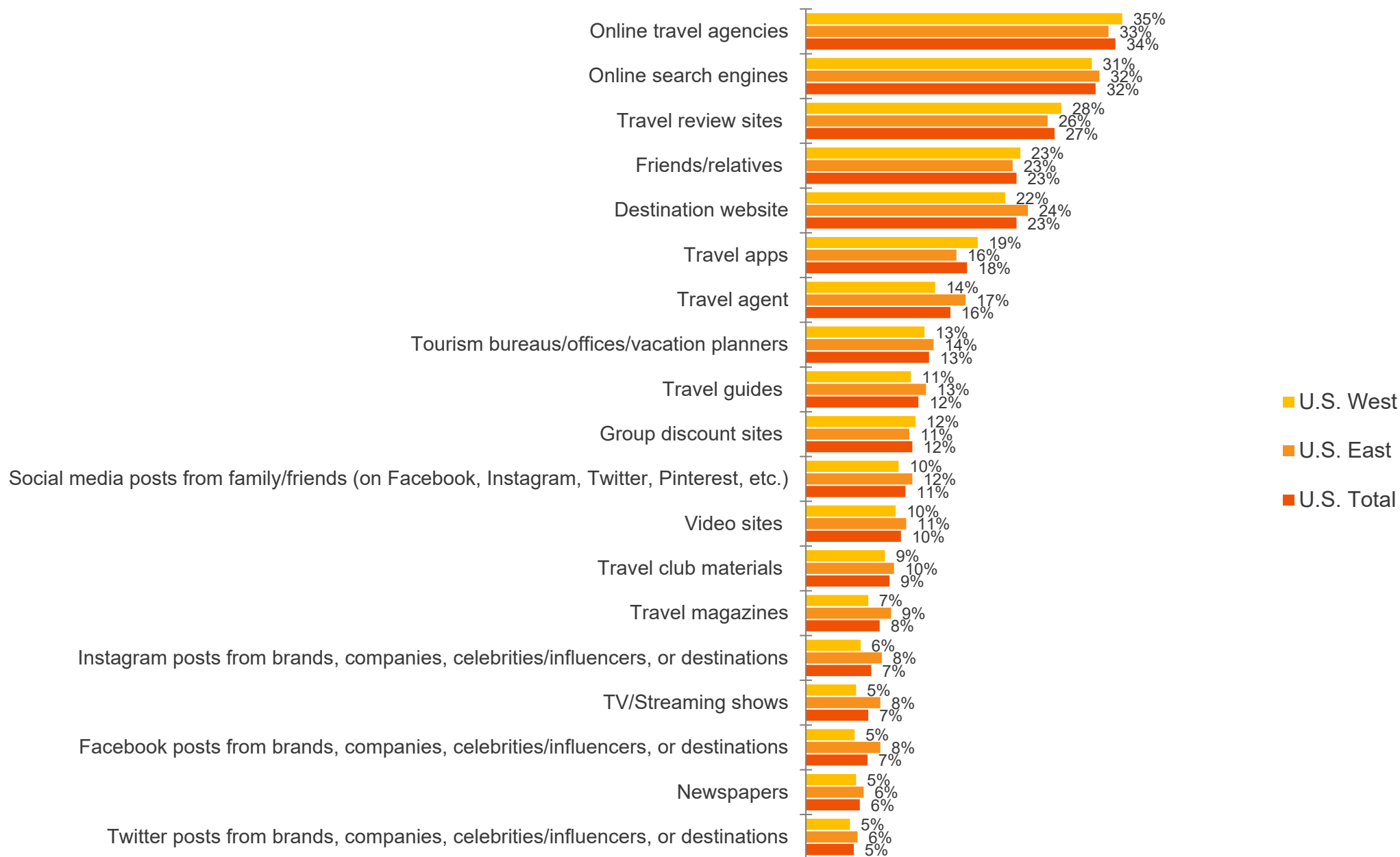
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



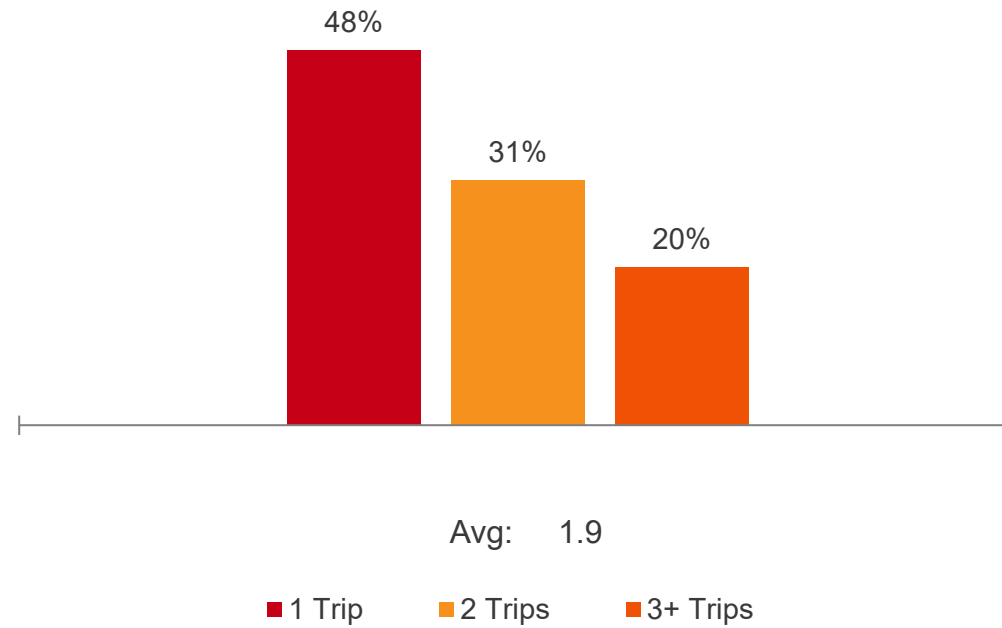
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Summary of Markets – Canada

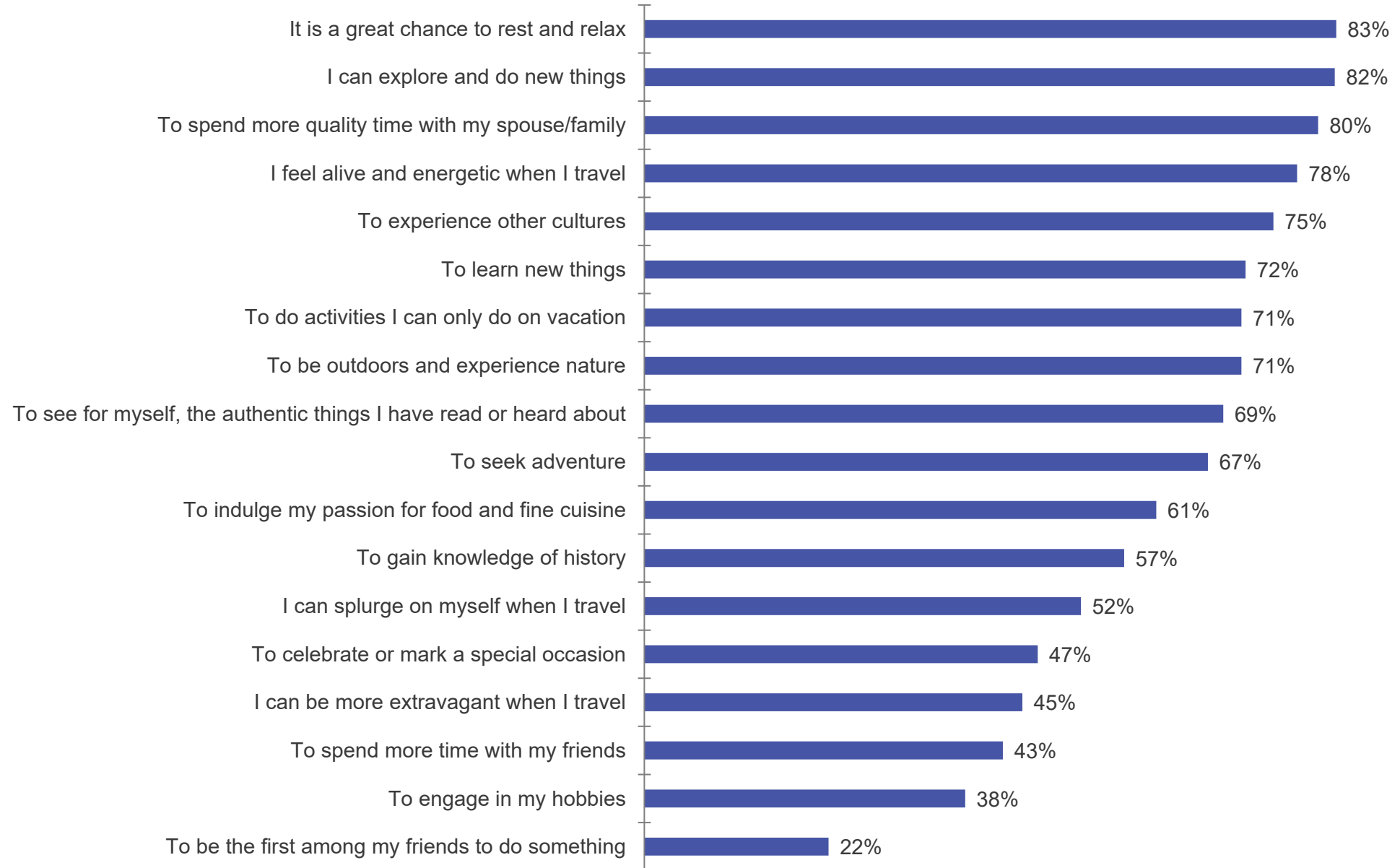
Demographics by Market

	Canada
<i>Base:</i>	601
Gender	
Male	49%
Female	51%
Marital Status	
Single	19%
Married	56%
Employment	
Full Time Employed	64%
Retired	15%
Education Level	
Graduated College	57%
Race/Ethnicity	
White	76%
Black/African America	2%
Asian/Pacific Islander	20%
Hispanic/Latino	1%
Children in Household (1+)	
Children at Home	37%
Age	
18-24	12%
25-34	18%
35-44	17%
45-54	19%
55-64	16%
65+	17%
Average	46.1
Household Income	
\$75 - \$99,999	38%
\$100 - \$150,000	41%
\$150,000+	20%
Average	\$121,152

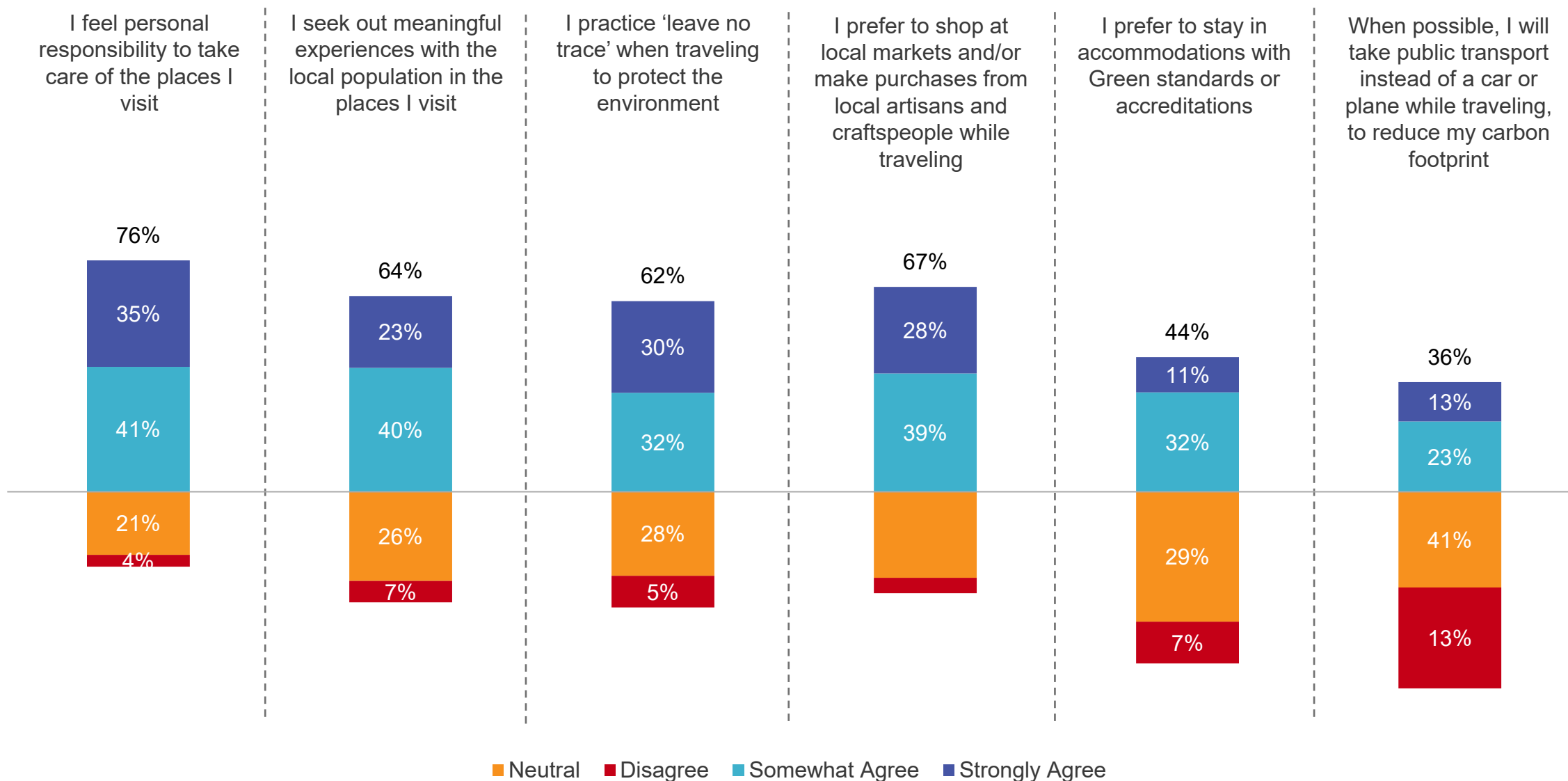
Number of Leisure Trips Taken in Past 12 Months



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



Sustainable Travel



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	39%
2	Florida	38%
3	Caribbean	33%
4	Mexico	32%
5	Las Vegas	31%
6	California	29%
7	Hawai'i	12%
8	Arizona	11%

Visited Past Year		
1	Europe	23%
2	Florida	21%
3	Caribbean	17%
4	Mexico	15%
5	California	14%
6	Las Vegas	14%
7	Hawai'i	6%
8	Arizona	4%

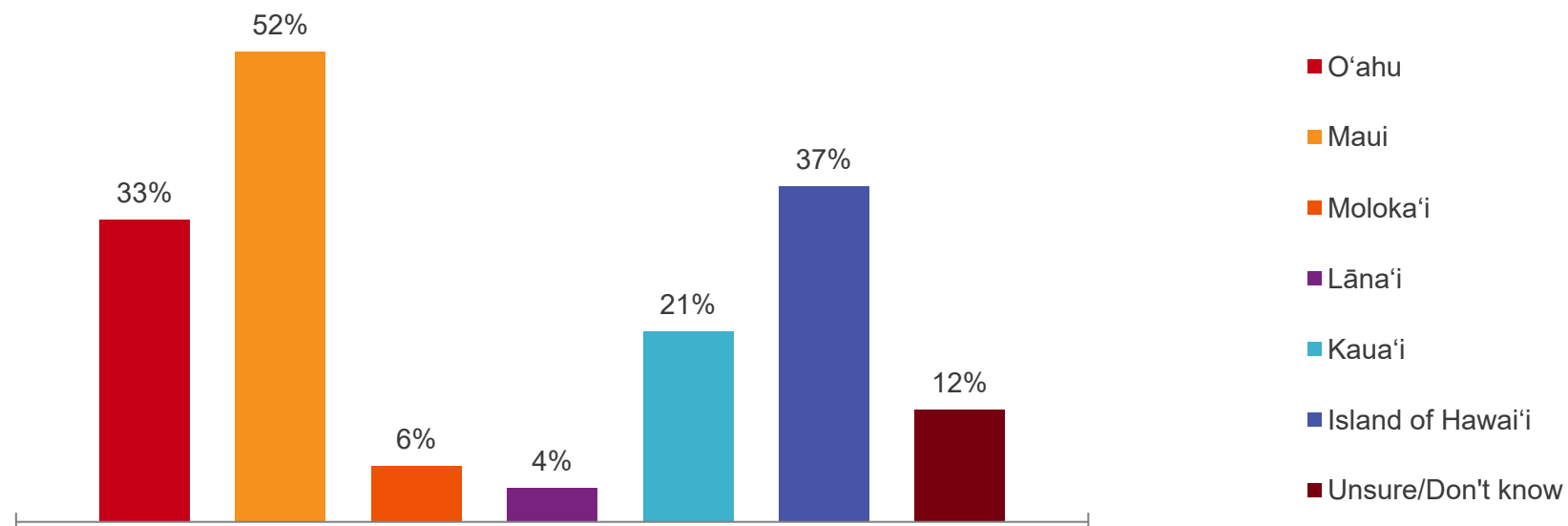
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	44%
2	Caribbean	38%
3	Hawai'i	36%
4	California	35%
5	Florida	35%
6	Mexico	32%
7	Las Vegas	30%
8	Arizona	13%

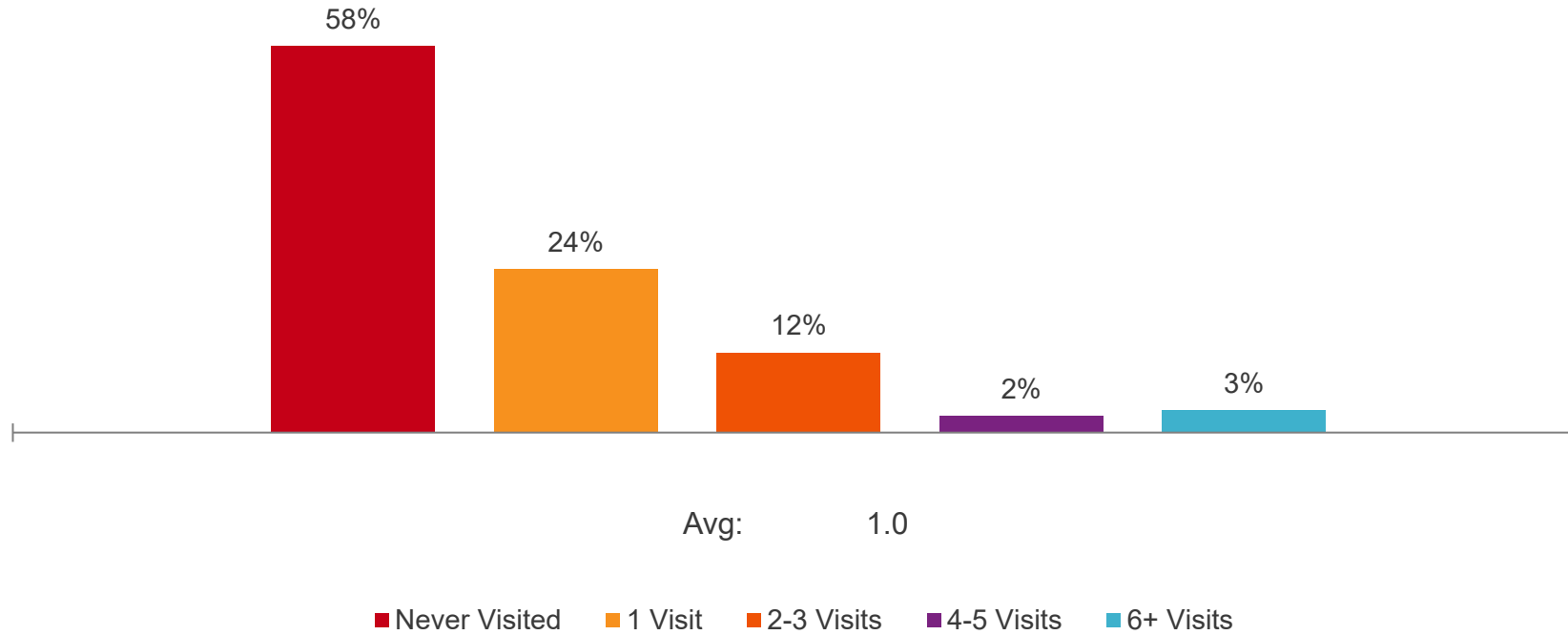
Interested Next 24 Months		
1	Europe	51%
2	Hawai'i	46%
3	Caribbean	41%
4	California	38%
5	Mexico	32%
6	Florida	32%
7	Las Vegas	32%
8	Arizona	18%

Planning Next 12 Months		
1	Europe	22%
2	Caribbean	17%
3	Florida	15%
4	California	15%
5	Hawai'i	13%
6	Mexico	12%
7	Las Vegas	12%
8	Arizona	6%

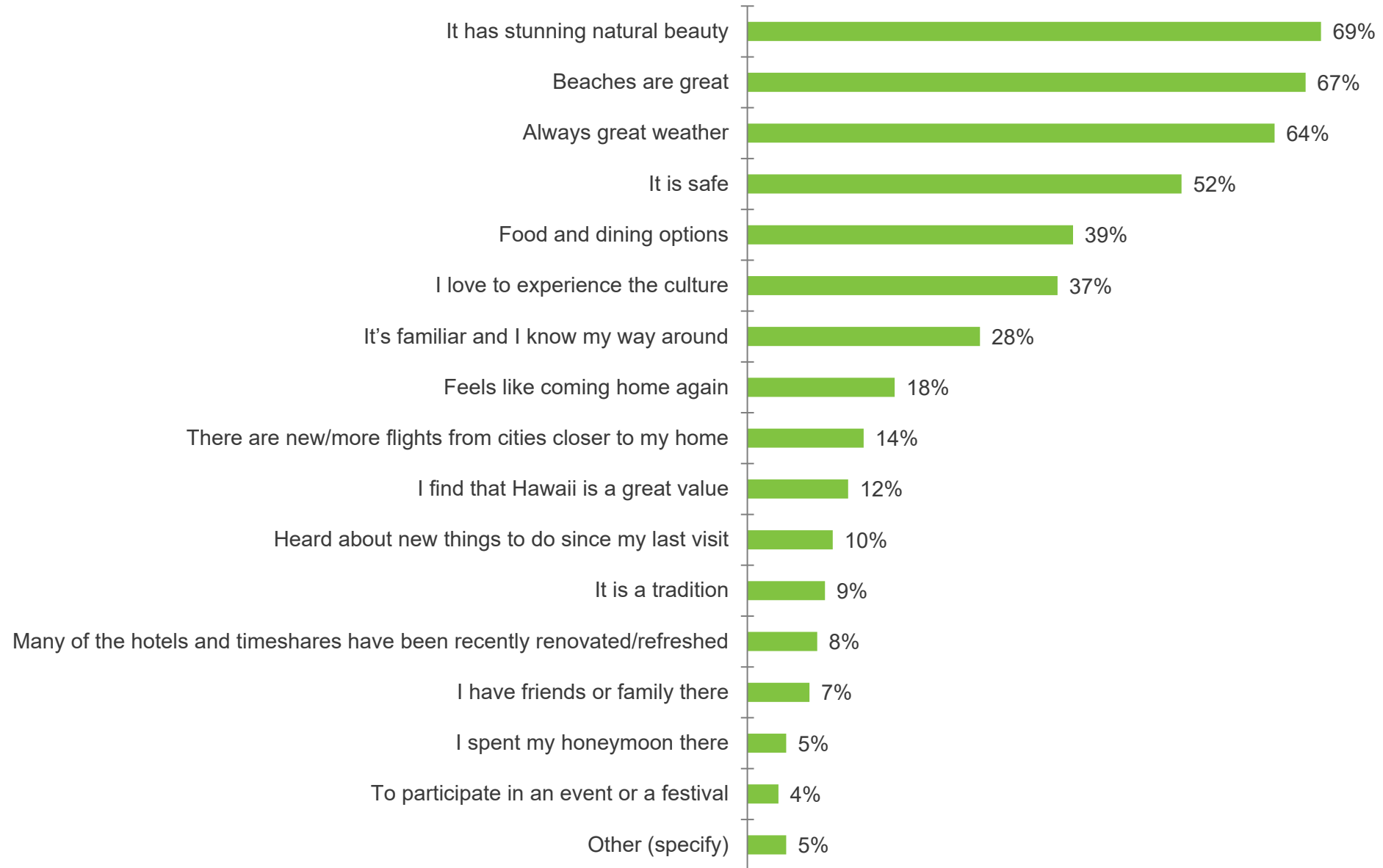
Hawaiian Islands Plan to Visit Next 12 Months



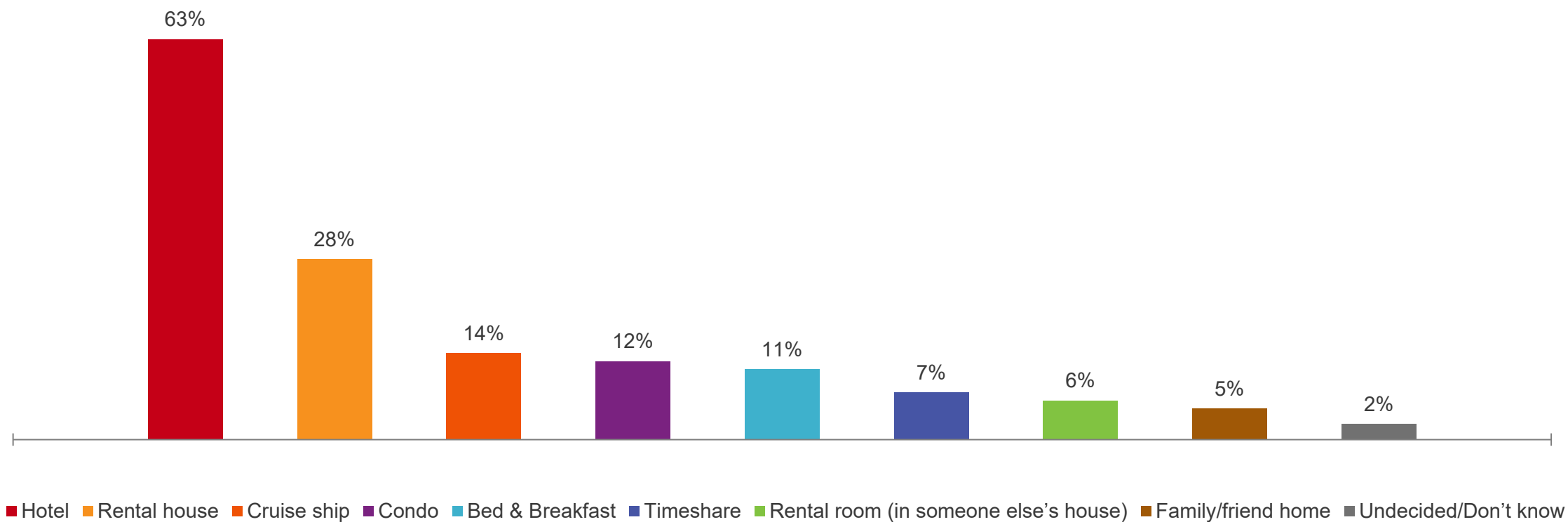
Number of Times Visited Hawai'i in Lifetime



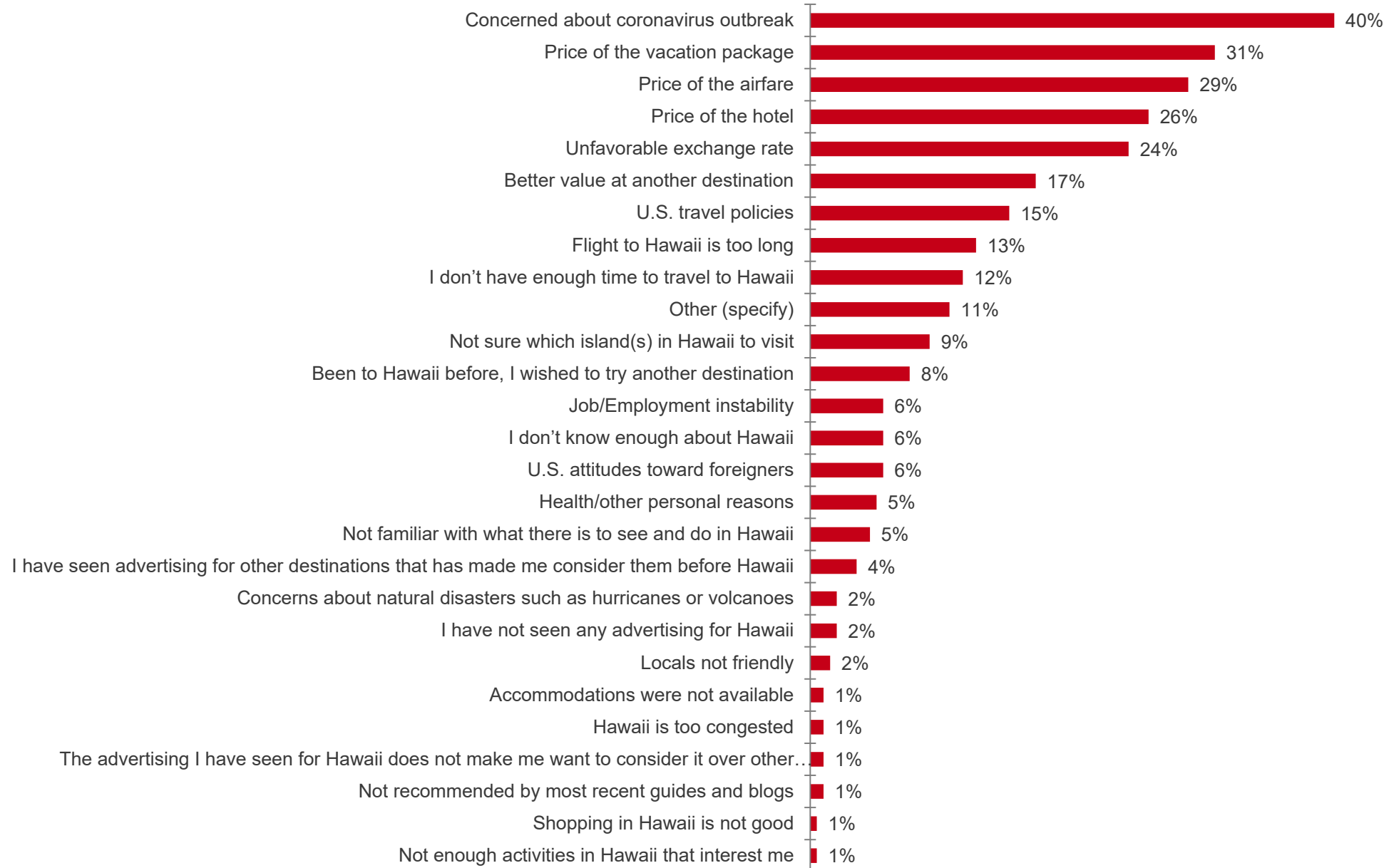
Reasons for Returning to Hawai'i



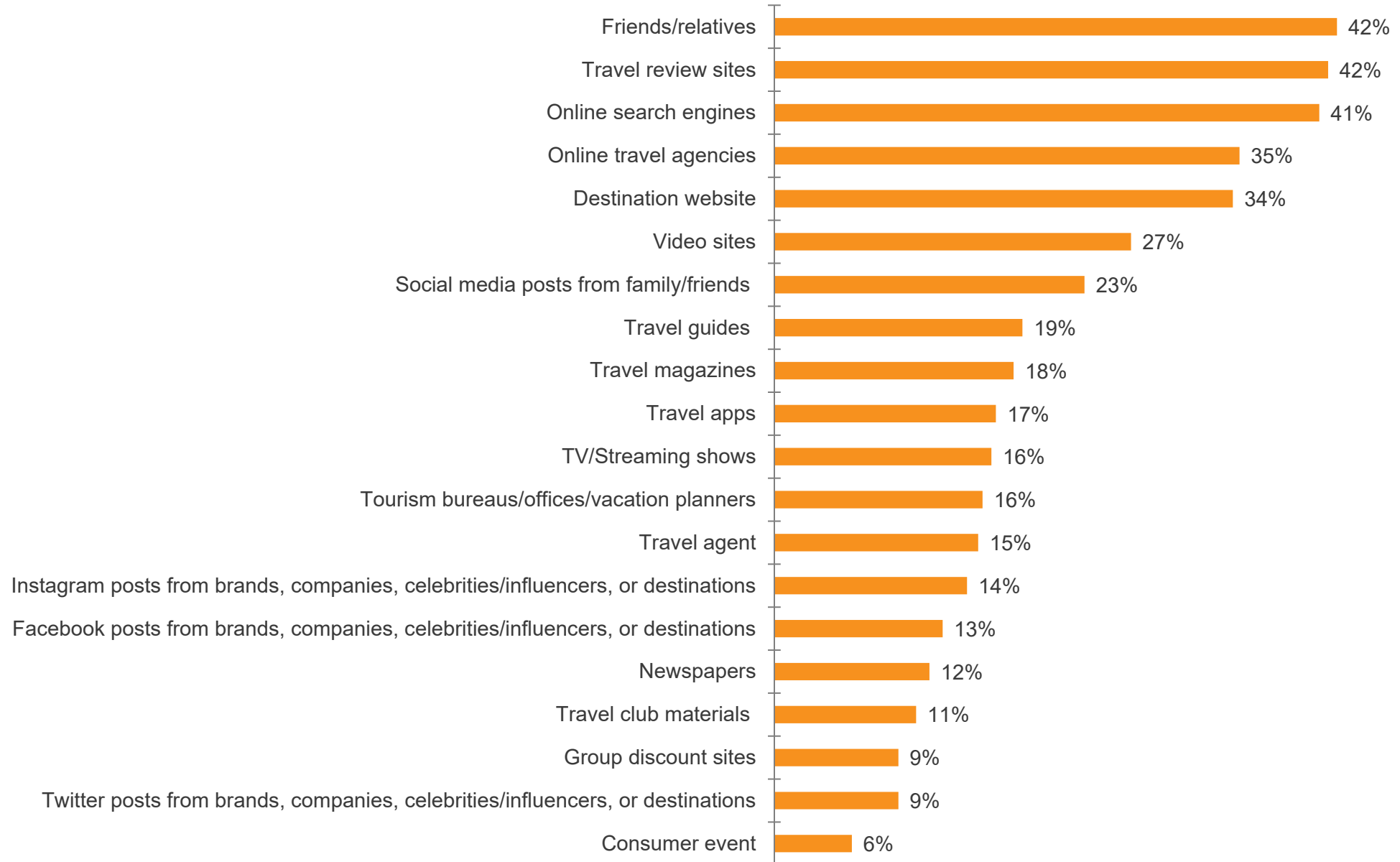
Hawai'i Planned Accommodations



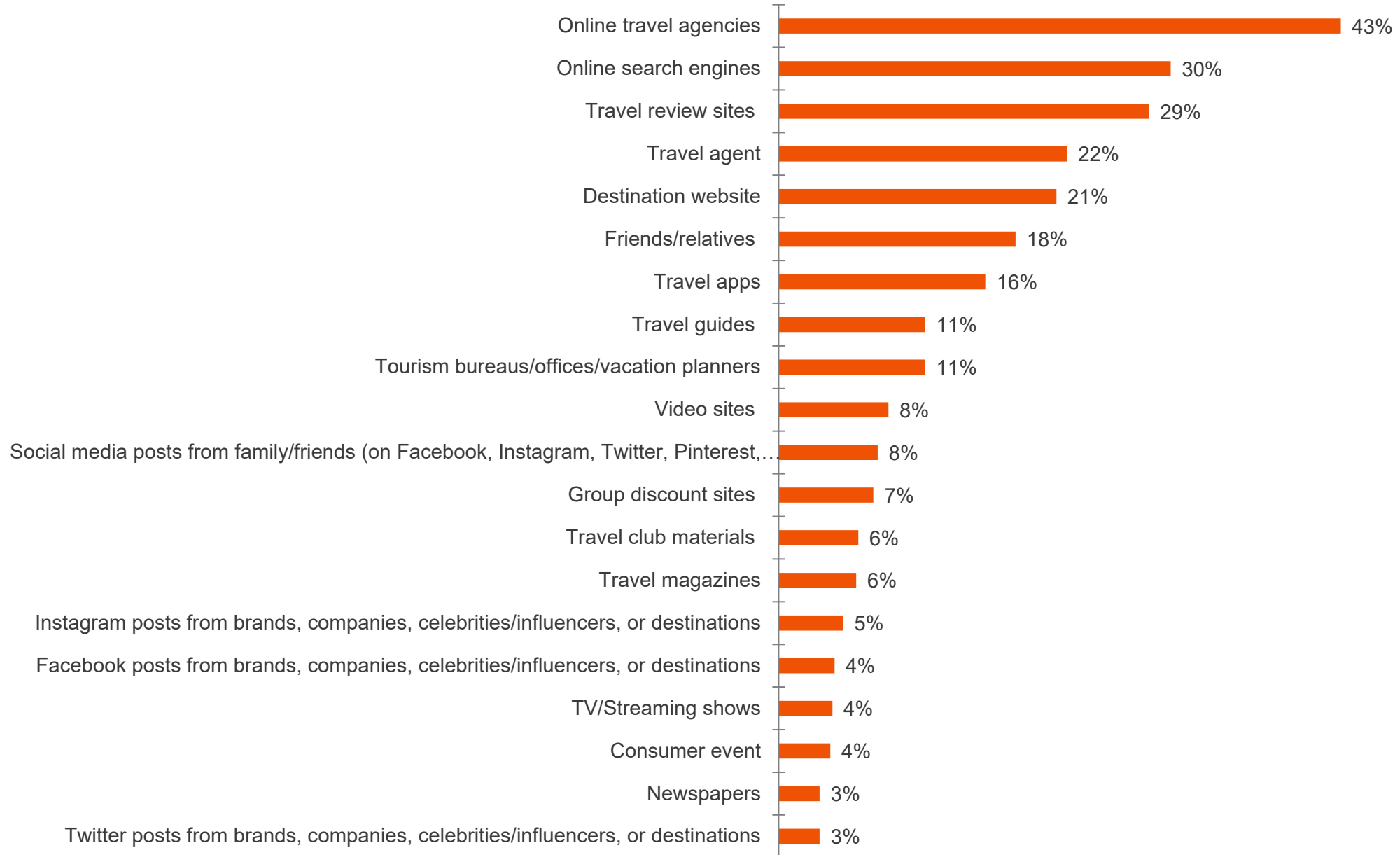
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



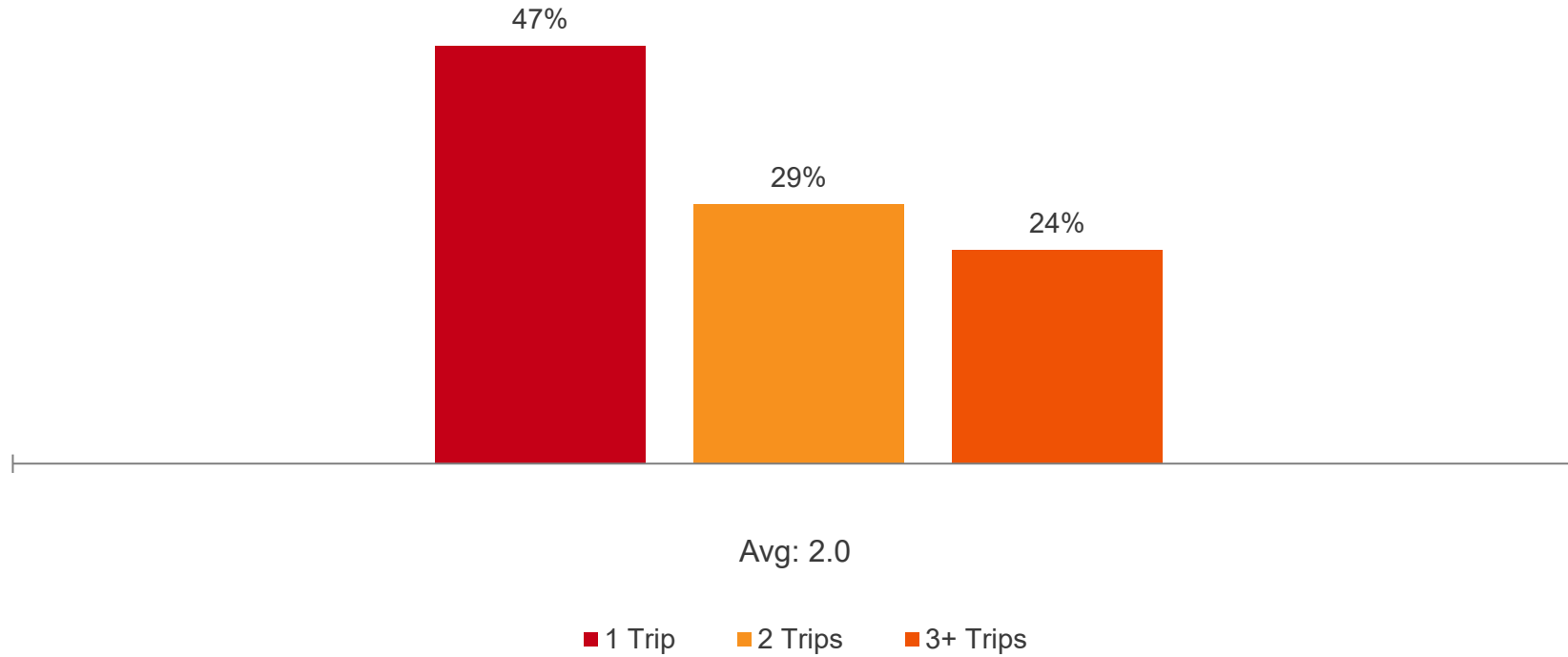
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Summary of Markets – Japan

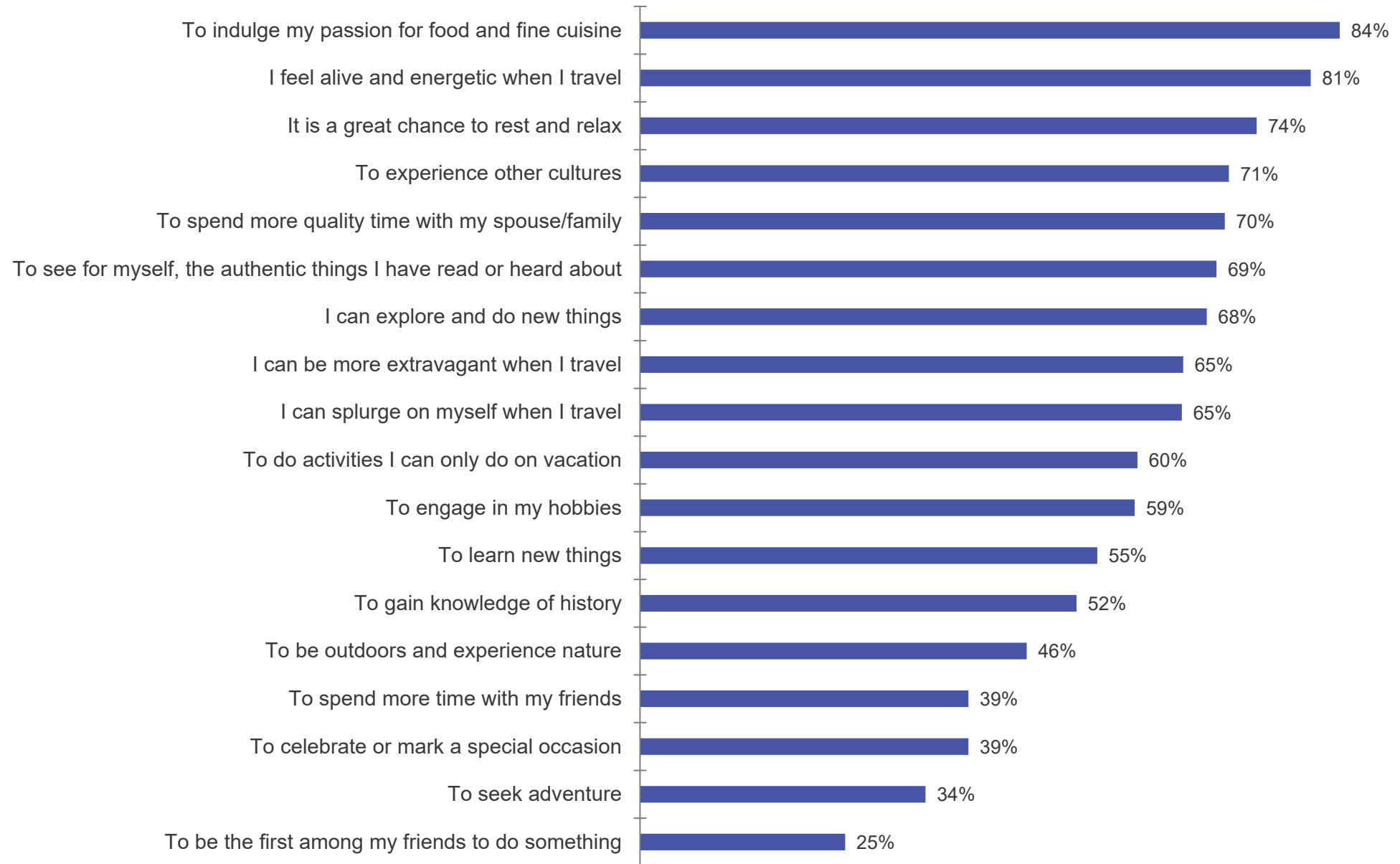
Demographics by Market

	Japan
<i>Base:</i>	601
Gender	
Male	51%
Female	49%
Marital Status	
Single	28%
Married	66%
Employment	
Full Time Employed	61%
Retired	11%
Education Level	
Graduated College	81%
Children in Household (1+)	
Children at Home	27%
Age	
18-24	11%
25-34	14%
35-44	14%
45-54	21%
55-64	12%
65+	28%
Average	49.1
Household Income	
Under ¥7,000,000	54%
¥7 - ¥9,999,999	24%
¥10 - ¥14,999,999	16%
¥15,000,000+	5%
Average	¥7,329,450

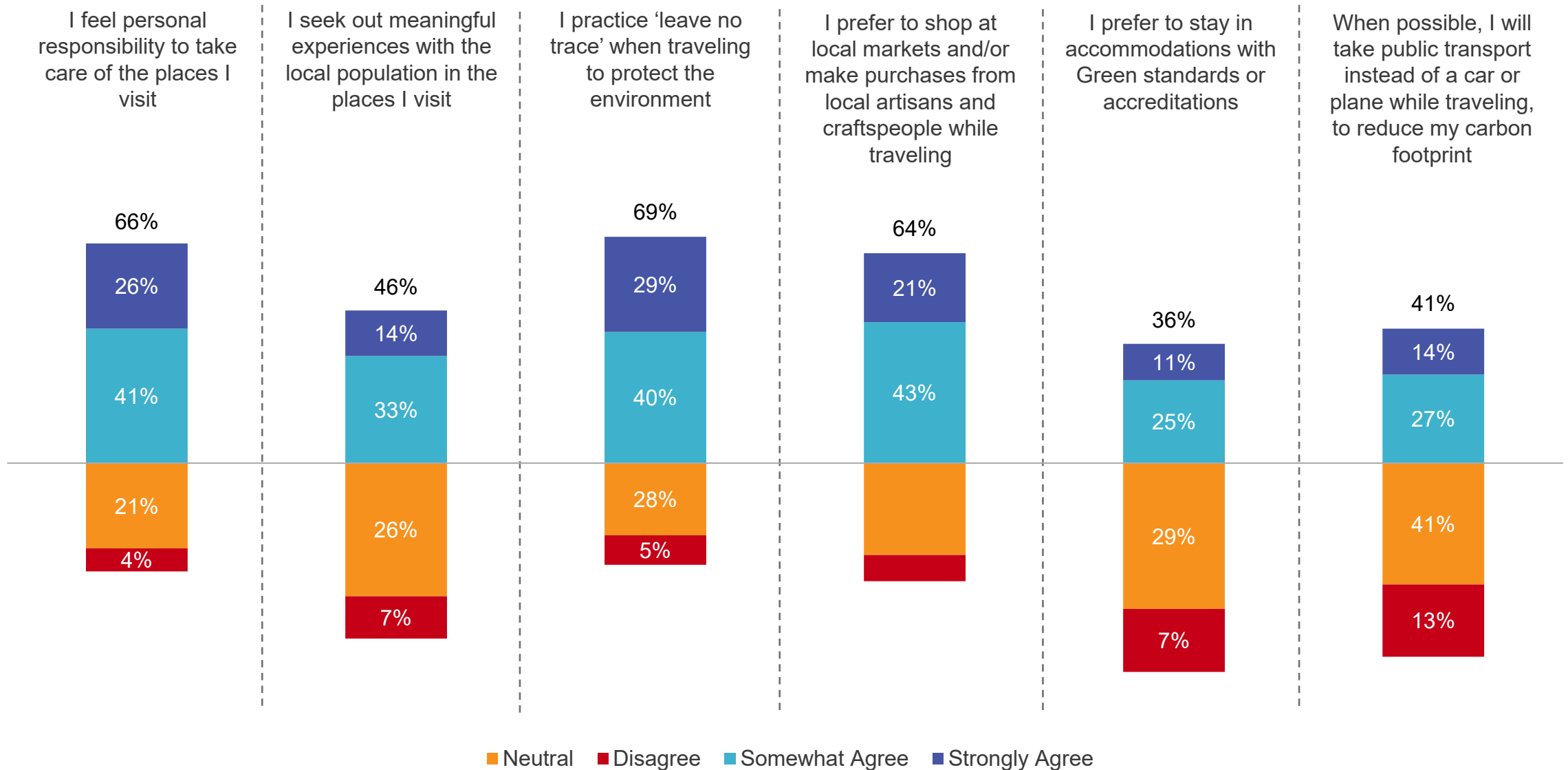
Number of Leisure Trips Taken in Past 12 Months



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



Sustainability Initiatives



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	34%
2	Okinawa	32%
3	Hawai'i	27%
4	Korea	22%
5	Singapore	17%
6	China	15%
7	Australia	13%
8	Guam	11%

Visited Past Year		
1	Okinawa	46%
2	Europe	21%
3	Hawai'i	14%
4	Korea	11%
5	Singapore	7%
6	China	6%
7	Australia	5%
8	Guam	4%

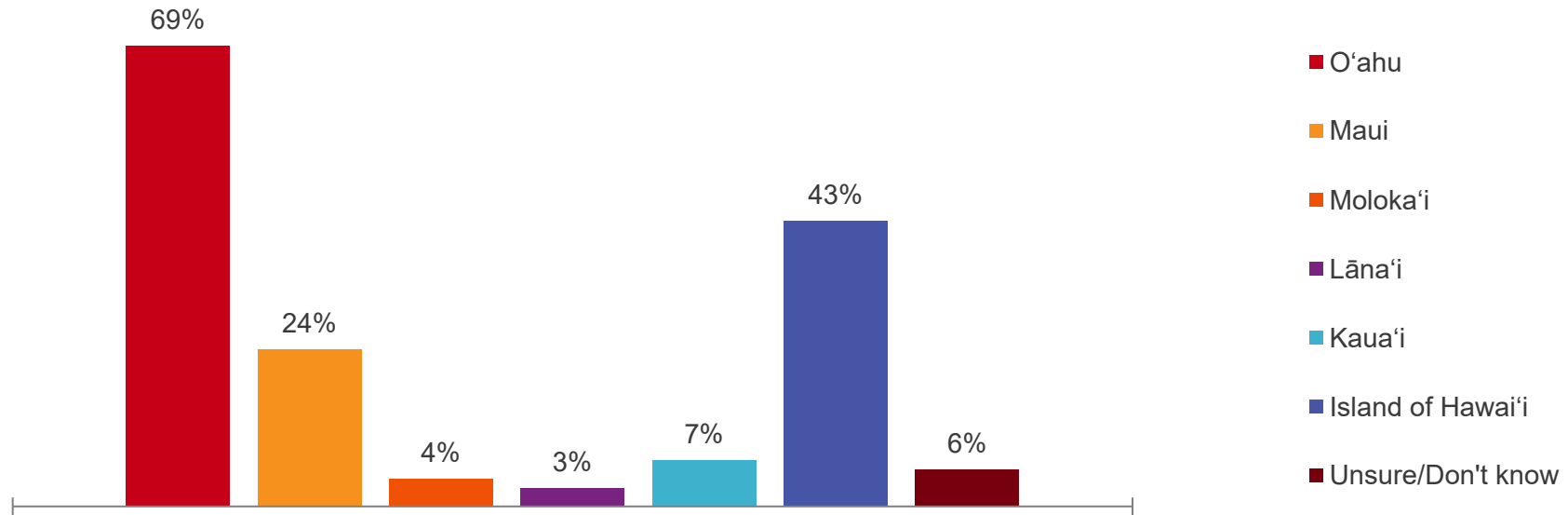
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	33%
2	Taiwan	28%
3	Hawai'i	28%
4	Okinawa	22%
5	Australia	18%
6	Singapore	16%
7	Guam/Saipan	14%
8	Korea	13%
9	Thailand	13%
10	Hong Kong	7%
11	China	4%

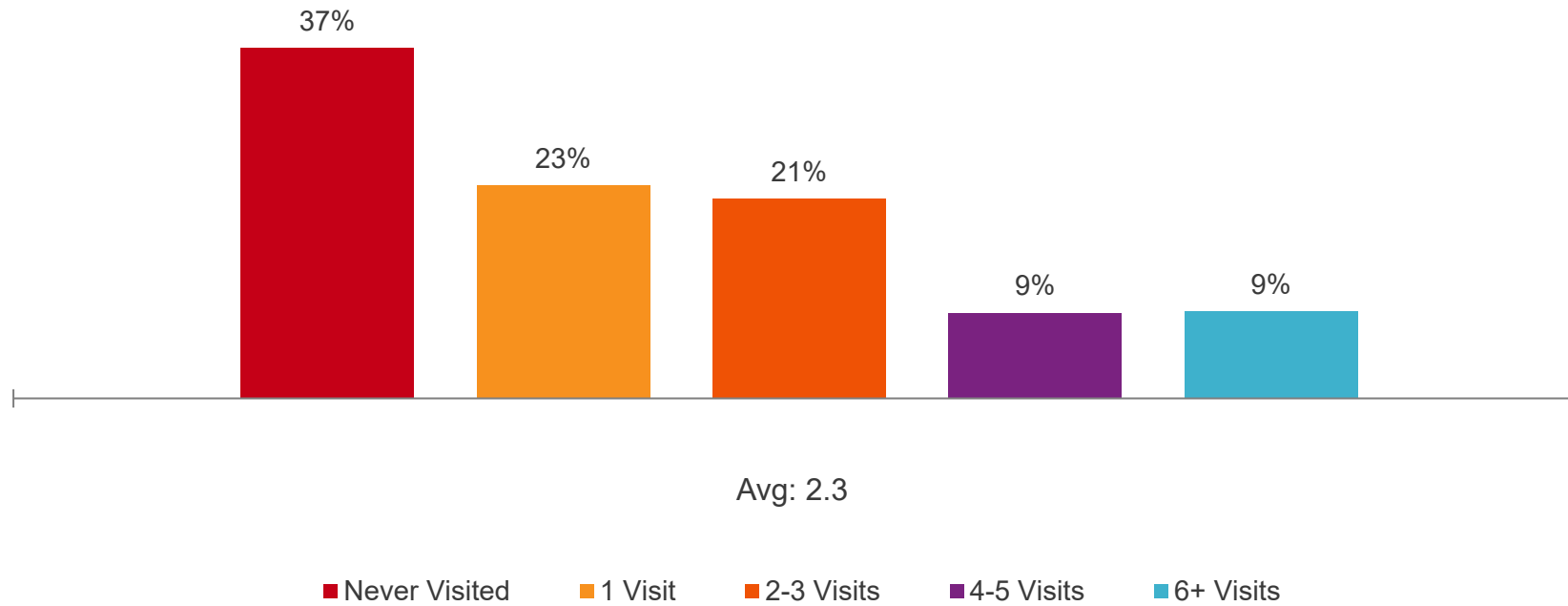
Interested Next 24 Months		
1	Europe	42%
2	Hawai'i	37%
3	Okinawa	30%
4	Australia	26%
5	Singapore	21%
6	Guam	15%
7	Korea	14%
8	China	12%

Planning Next 12 Months		
1	Okinawa	41%
2	Europe	15%
3	Hawai'i	12%
4	Australia	5%
5	Singapore	5%
6	Korea	4%
7	Guam	3%
8	China	2%

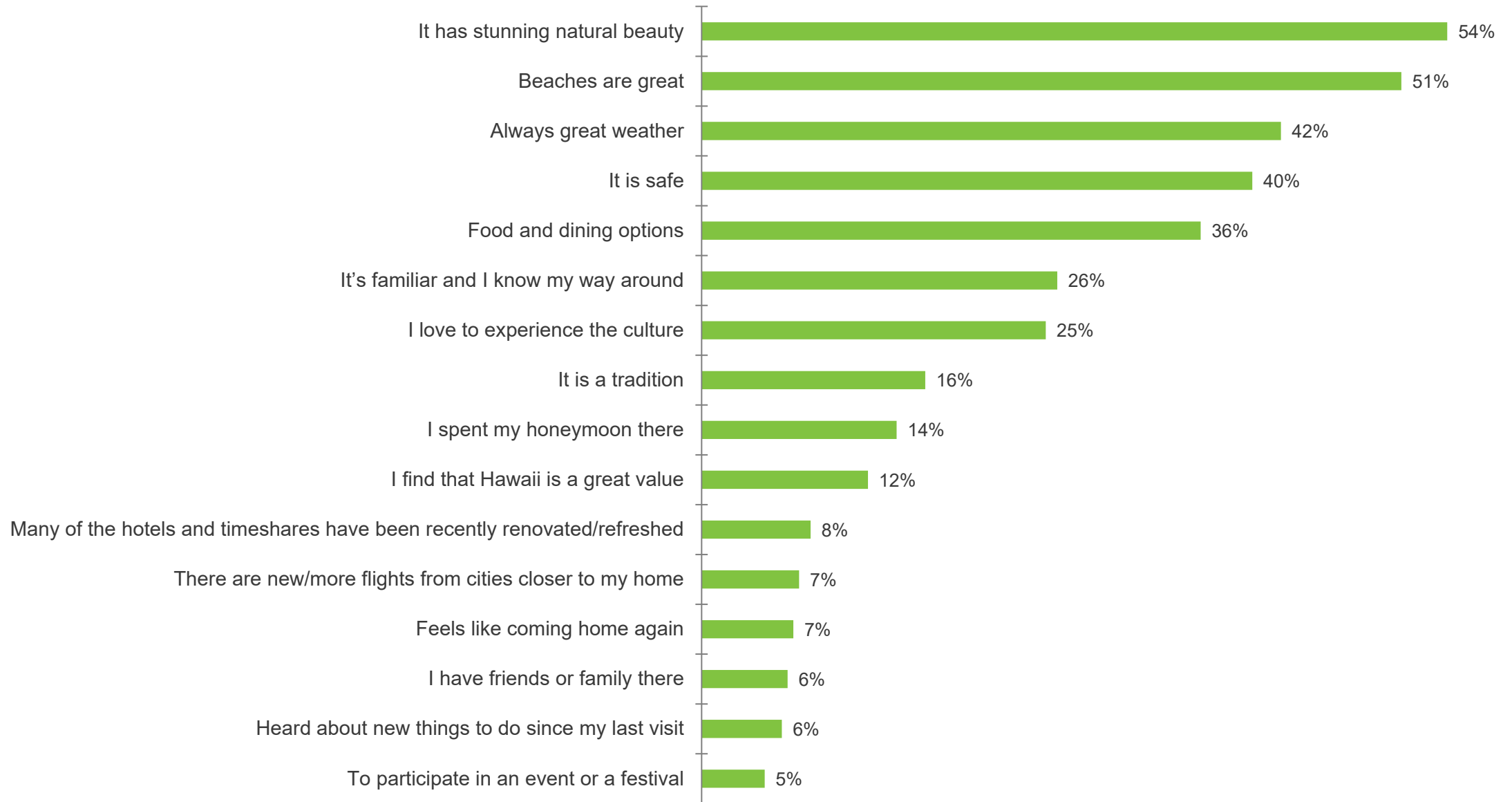
Hawaiian Islands Plan to Visit Next 12 Months



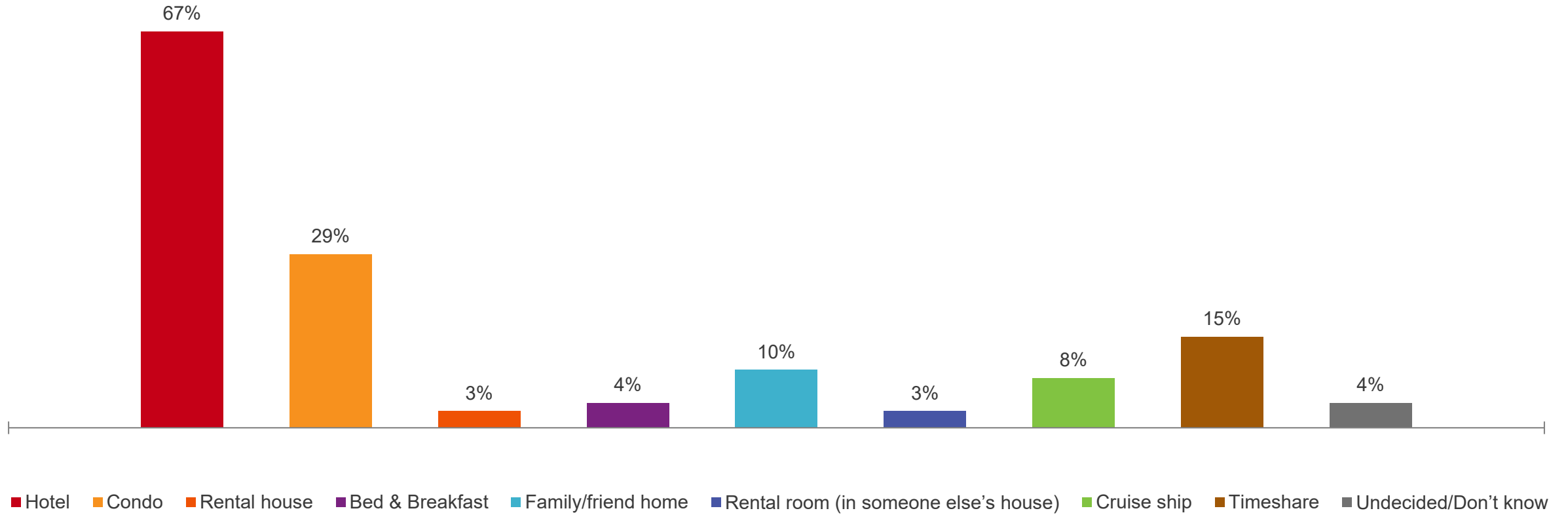
Number of Times Visited Hawai'i in Lifetime



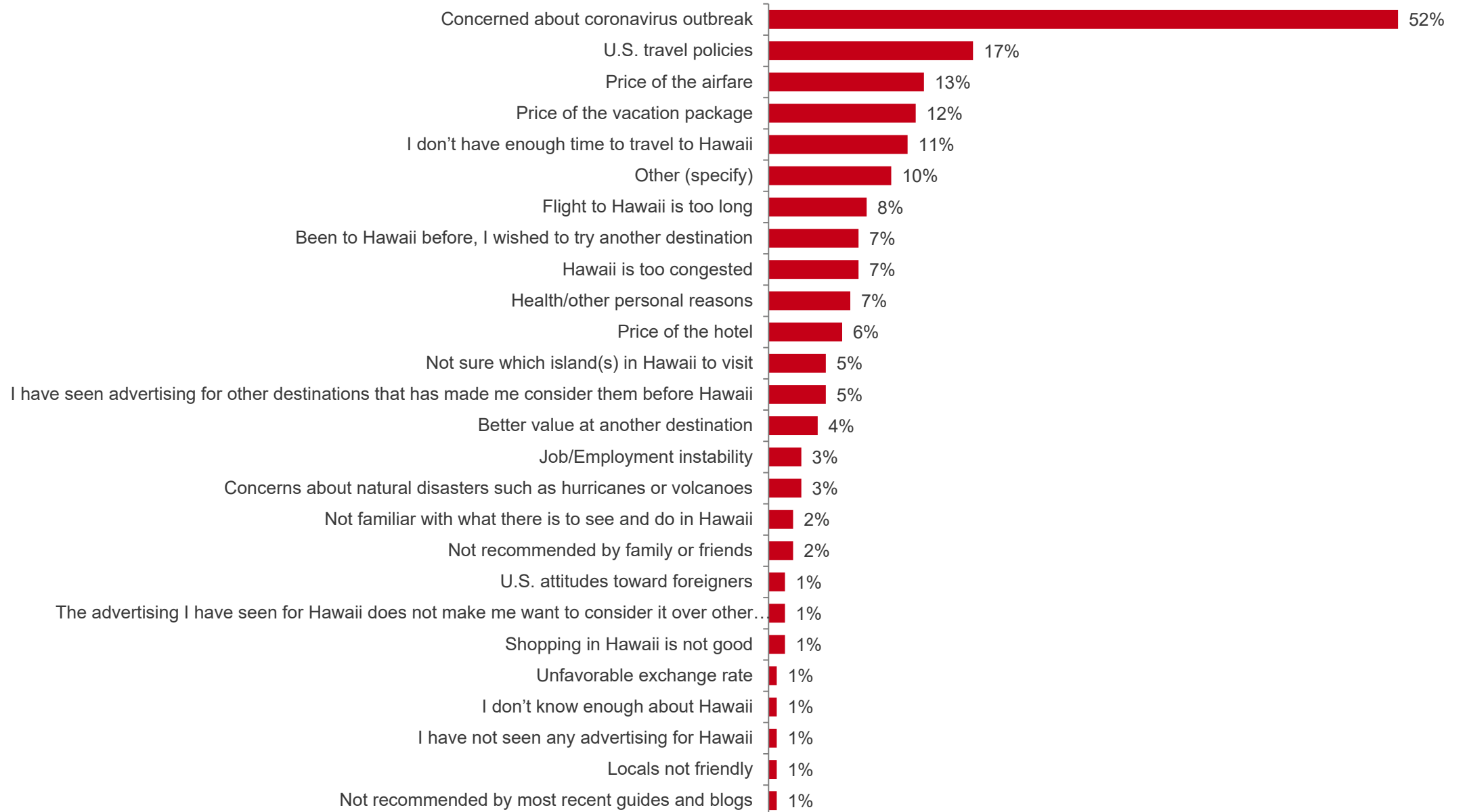
Reasons for Returning to Hawai'i



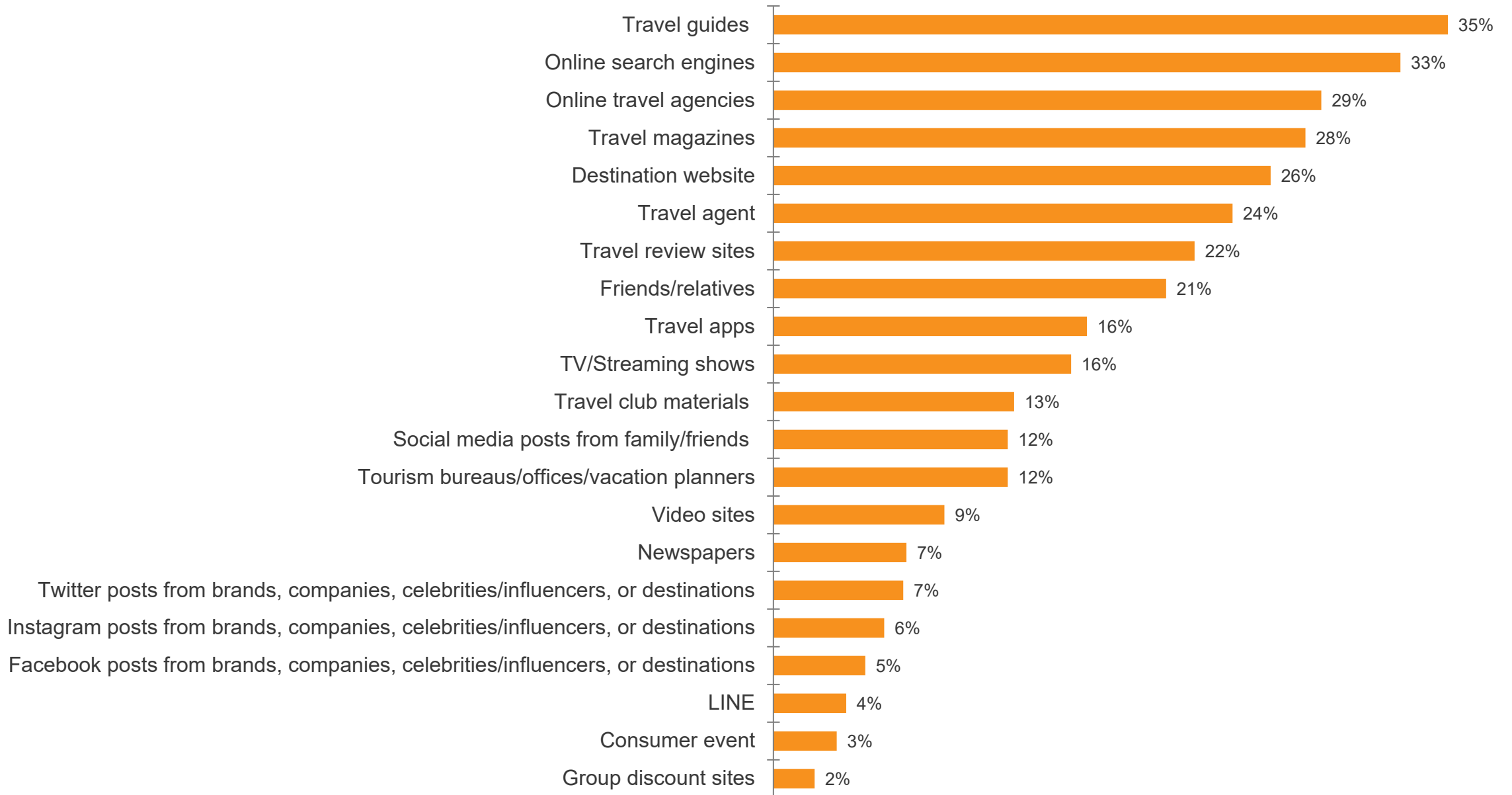
Hawai'i Planned Accommodations



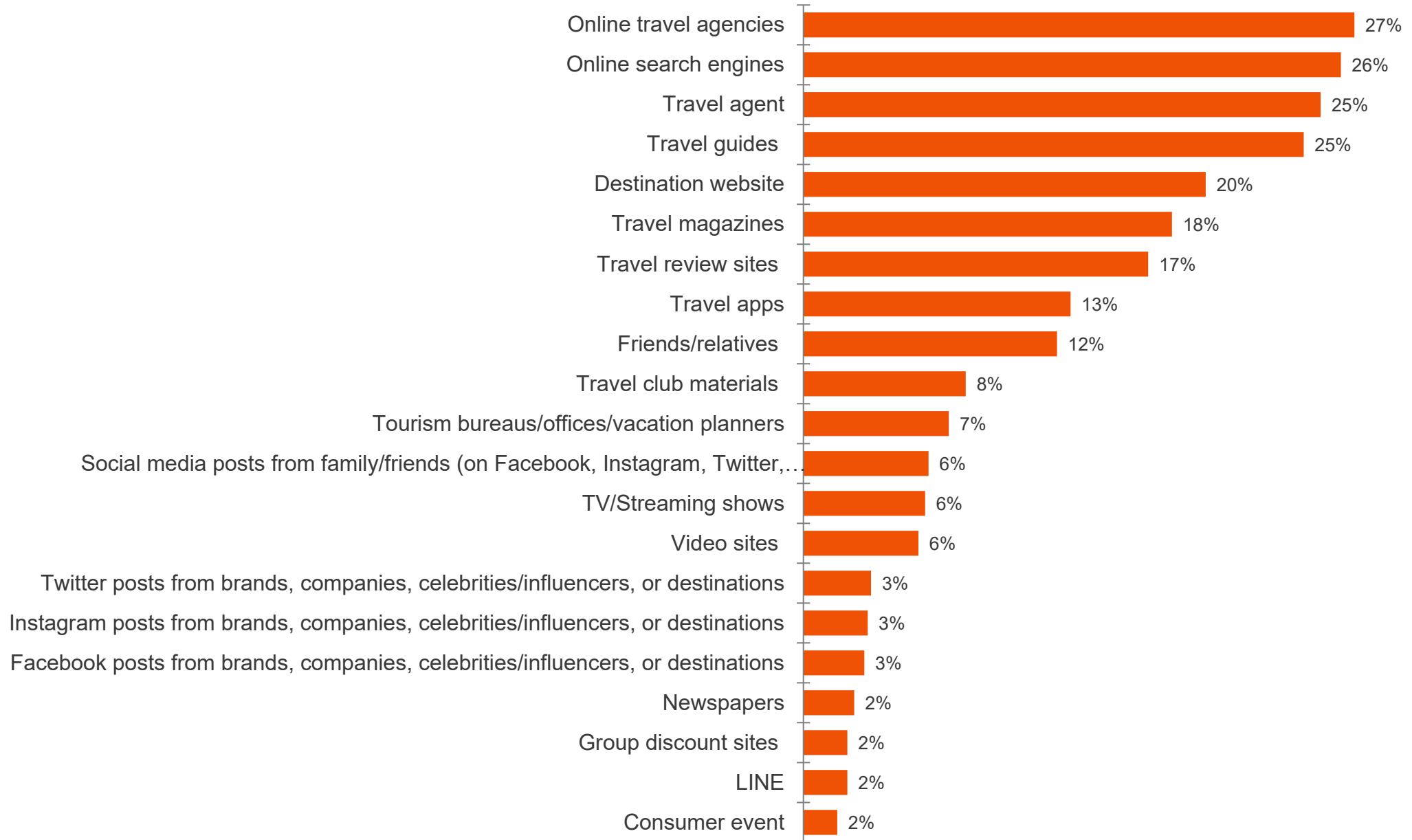
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



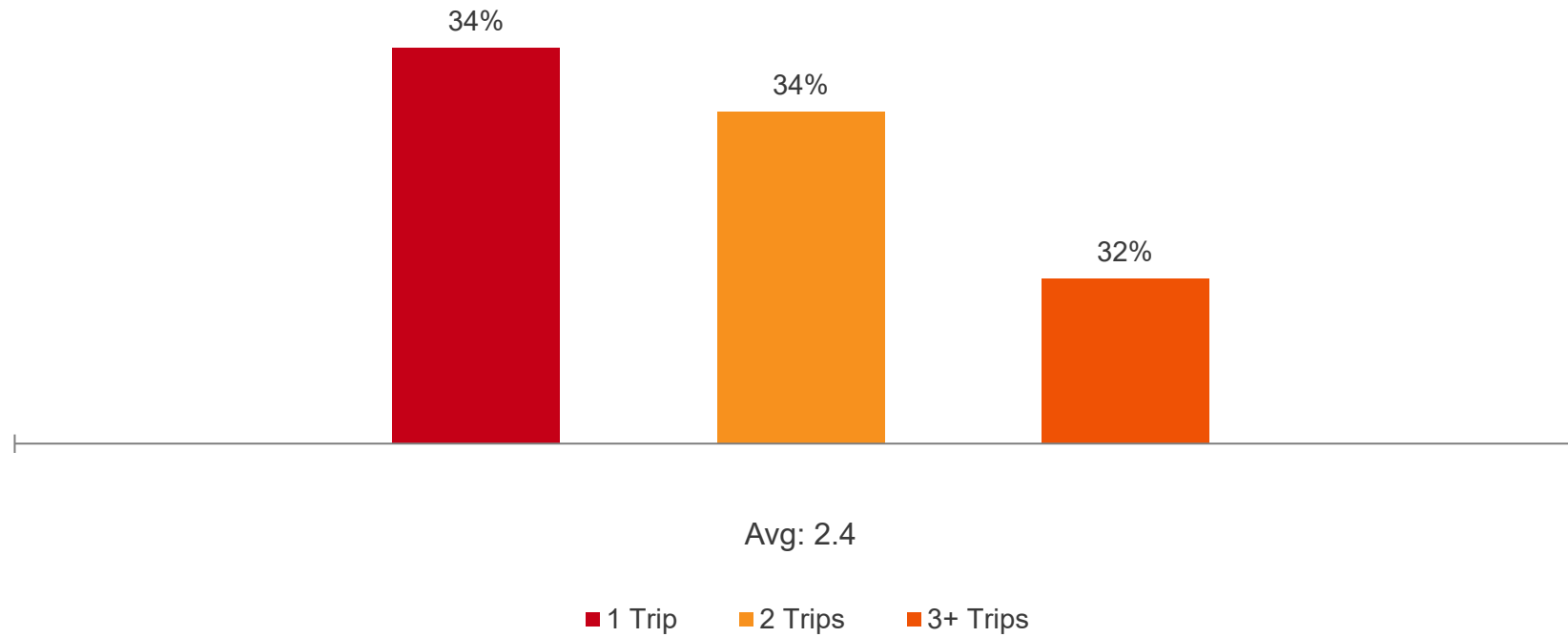
4

Summary of Markets – Korea

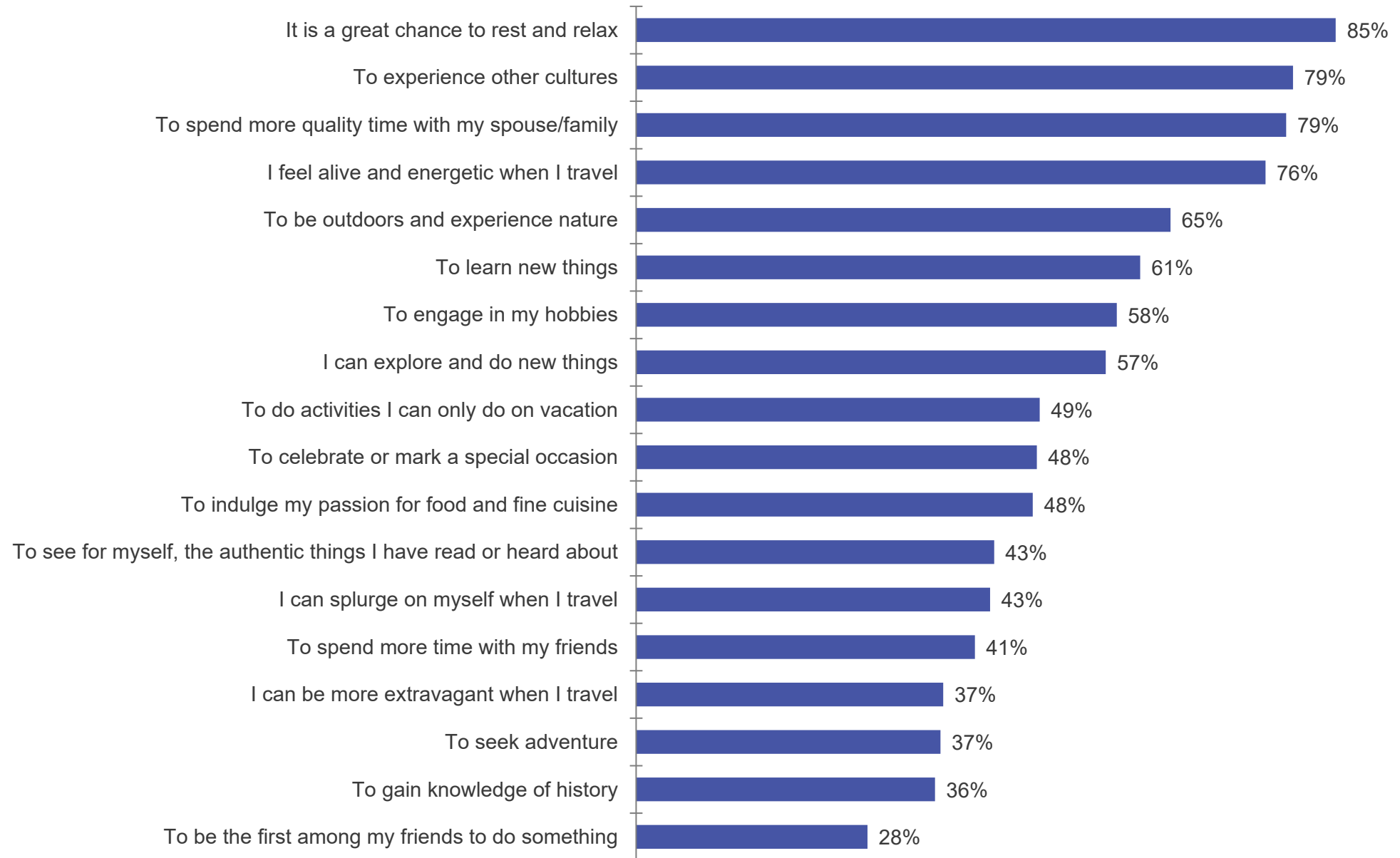
Demographics by Market

	Korea
<i>Base:</i>	601
Gender	
Male	50%
Female	50%
Marital Status	
Single	33%
Married	63%
Employment	
Full Time Employed	69%
Retired	7%
Education Level	
Graduated College	82%
Children in Household (1+)	
Children at Home	37%
Age	
18-24	14%
25-34	18%
35-44	21%
45-54	24%
55-64	16%
65+	7%
Average	42.8
Household Income	
Under ₩80M	63%
₩80M - ₩110M	26%
₩110M - ₩160M	8%
₩160M+	2%
Average	₩74,608,985

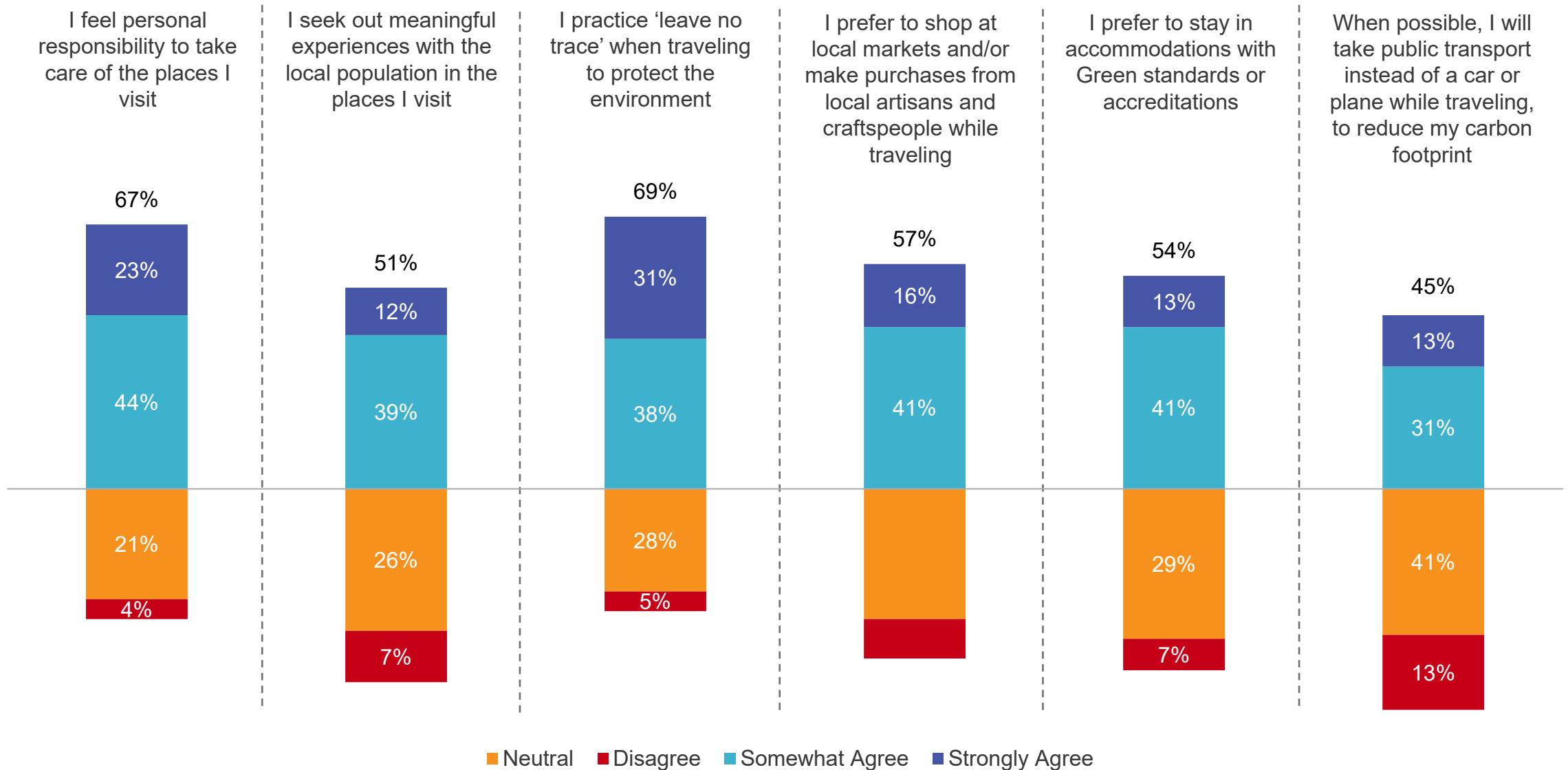
Number of Leisure Trips Taken in Past 12 Months



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



Sustainability Initiatives



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Southeast Asia	58%
2	Japan	53%
3	Europe	30%
4	China	27%
5	U.S.A	19%
6	Hawai'i	14%
7	Australia	13%
8	Maldives	7%

Visited Past Year		
1	Southeast Asia	40%
2	Japan	29%
3	Europe	16%
4	China	13%
5	U.S.A	12%
6	Hawai'i	7%
7	Australia	5%
8	Maldives	3%

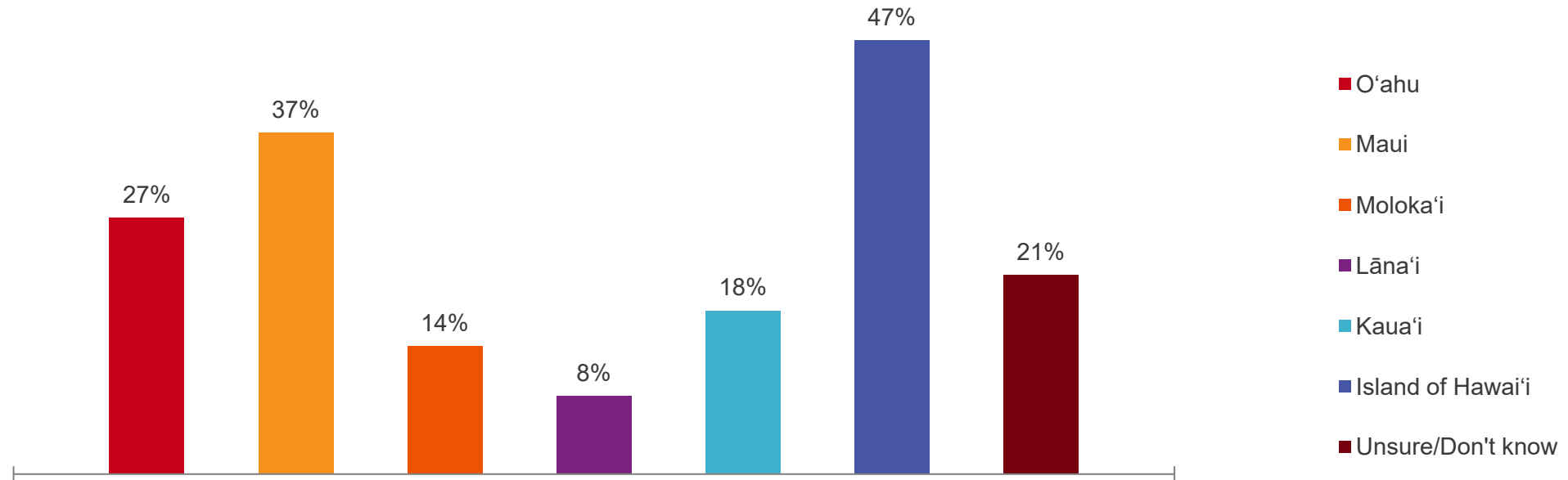
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	40%
2	Hawai'i	39%
3	Guam/Saipan	34%
4	Southeast Asia	30%
5	Australia	30%
6	Maldives	27%
7	Japan	21%
8	U.S.A	14%

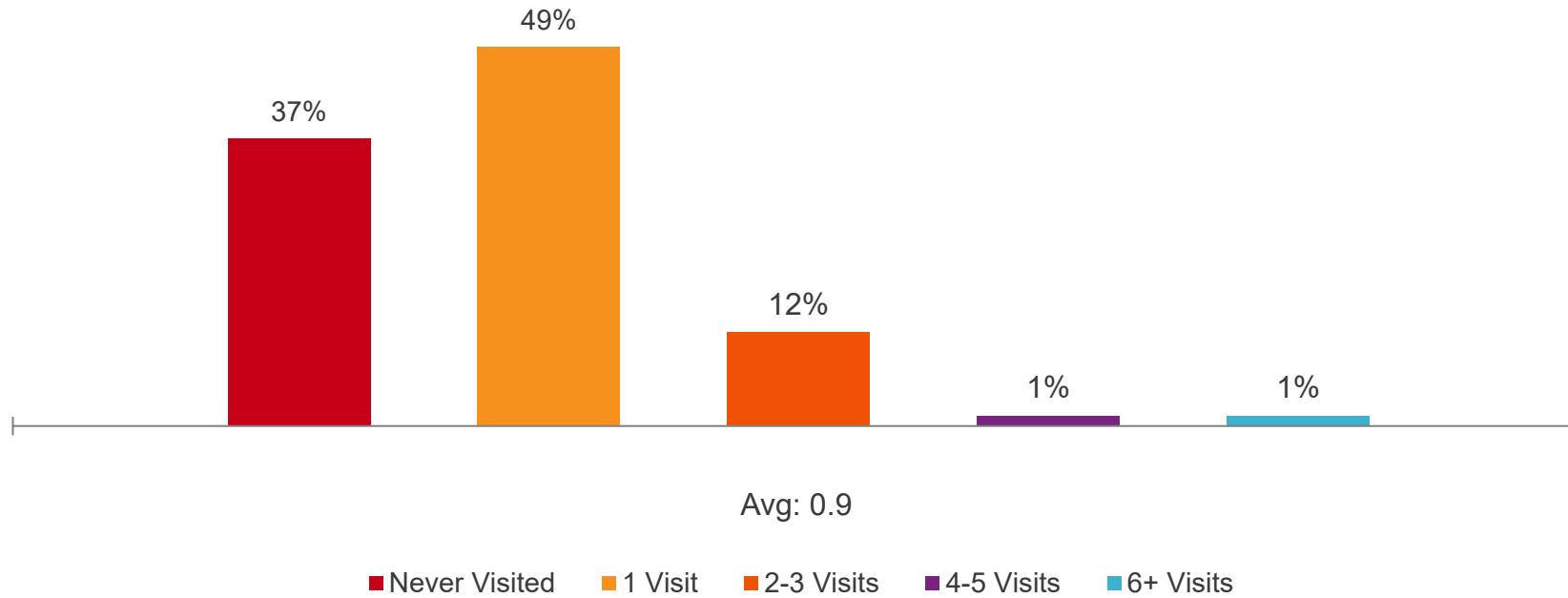
Interested Next 24 Months		
1	Europe	42%
2	Hawai'i	38%
3	South East Asia	34%
4	Australia	27%
5	U.S.A	27%
6	Maldives	24%
7	Japan	21%
8	China	8%

Planning Next 12 Months		
1	Southeast Asia	22%
2	Hawai'i	22%
3	Europe	21%
4	Japan	15%
5	Australia	14%
6	U.S.A	14%
7	Maldives	13%
8	China	4%

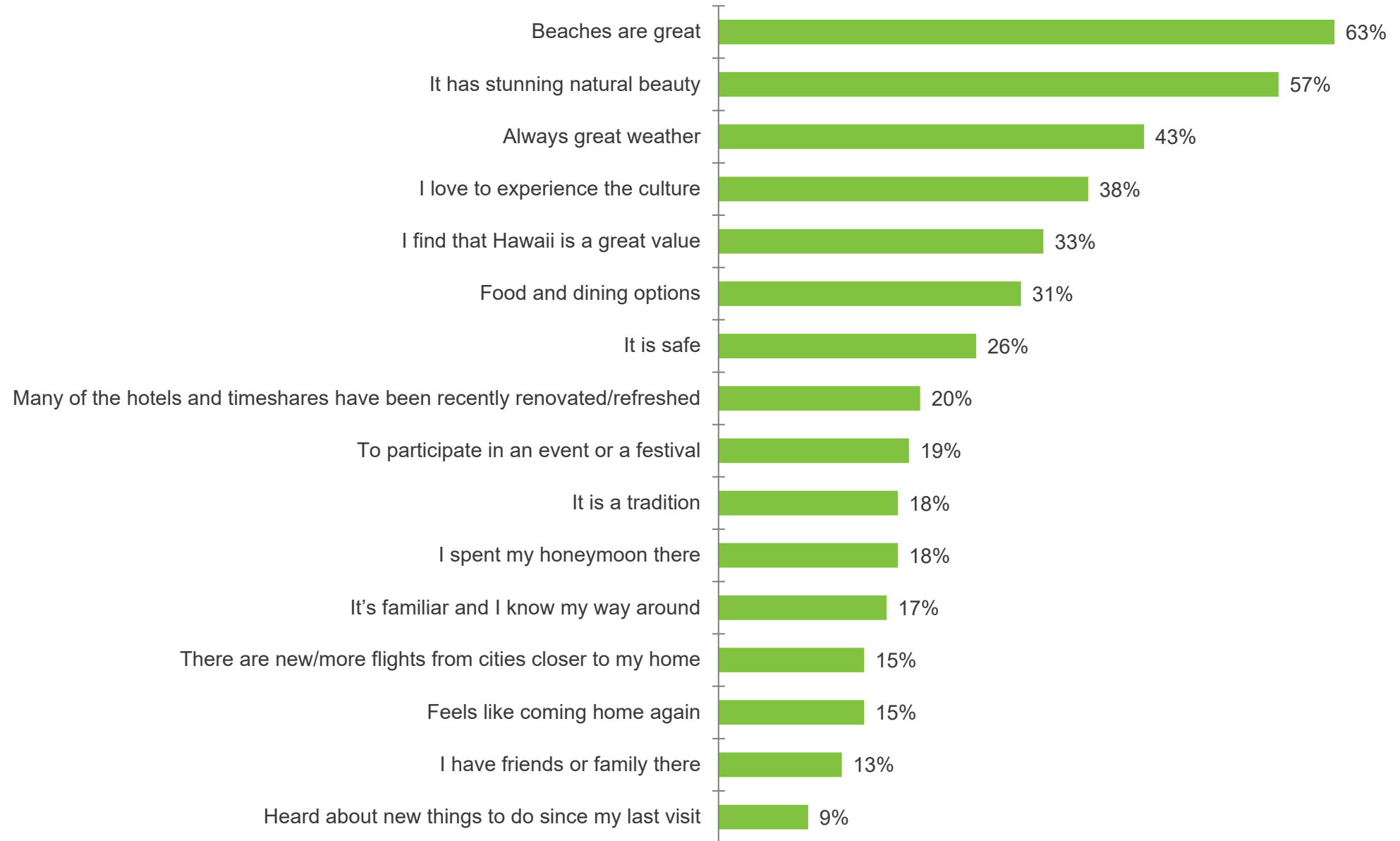
Hawai'i Islands Plan to Visit Next 12 Months



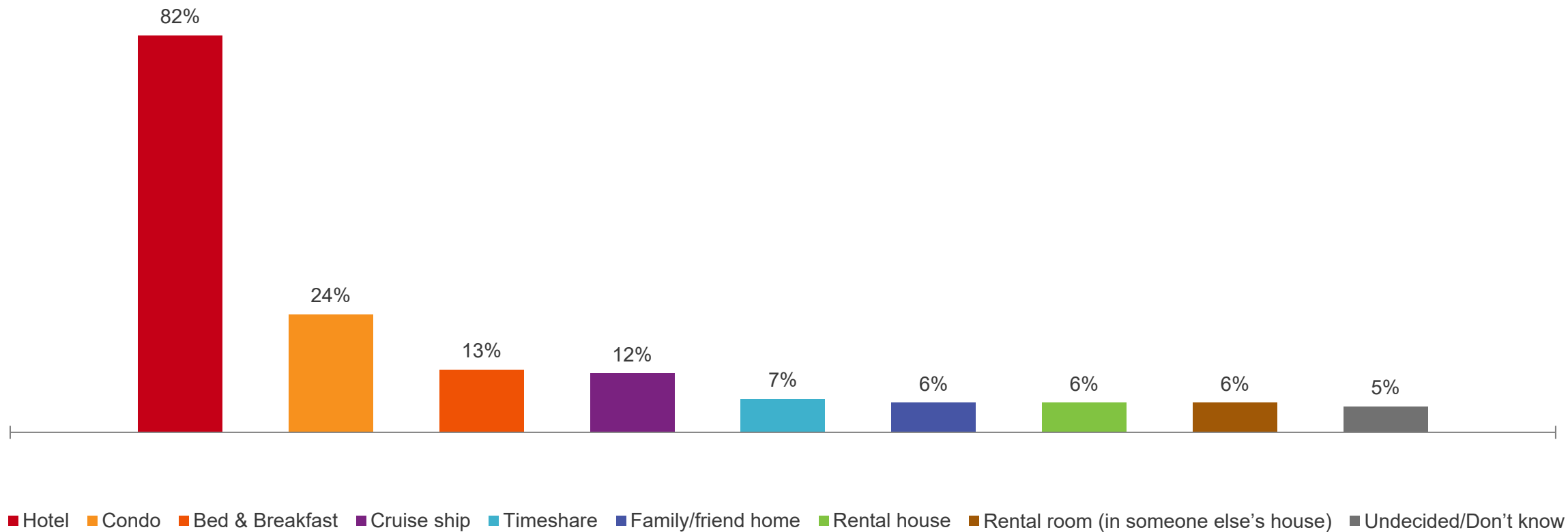
Number of Times Visited Hawai'i in Lifetime



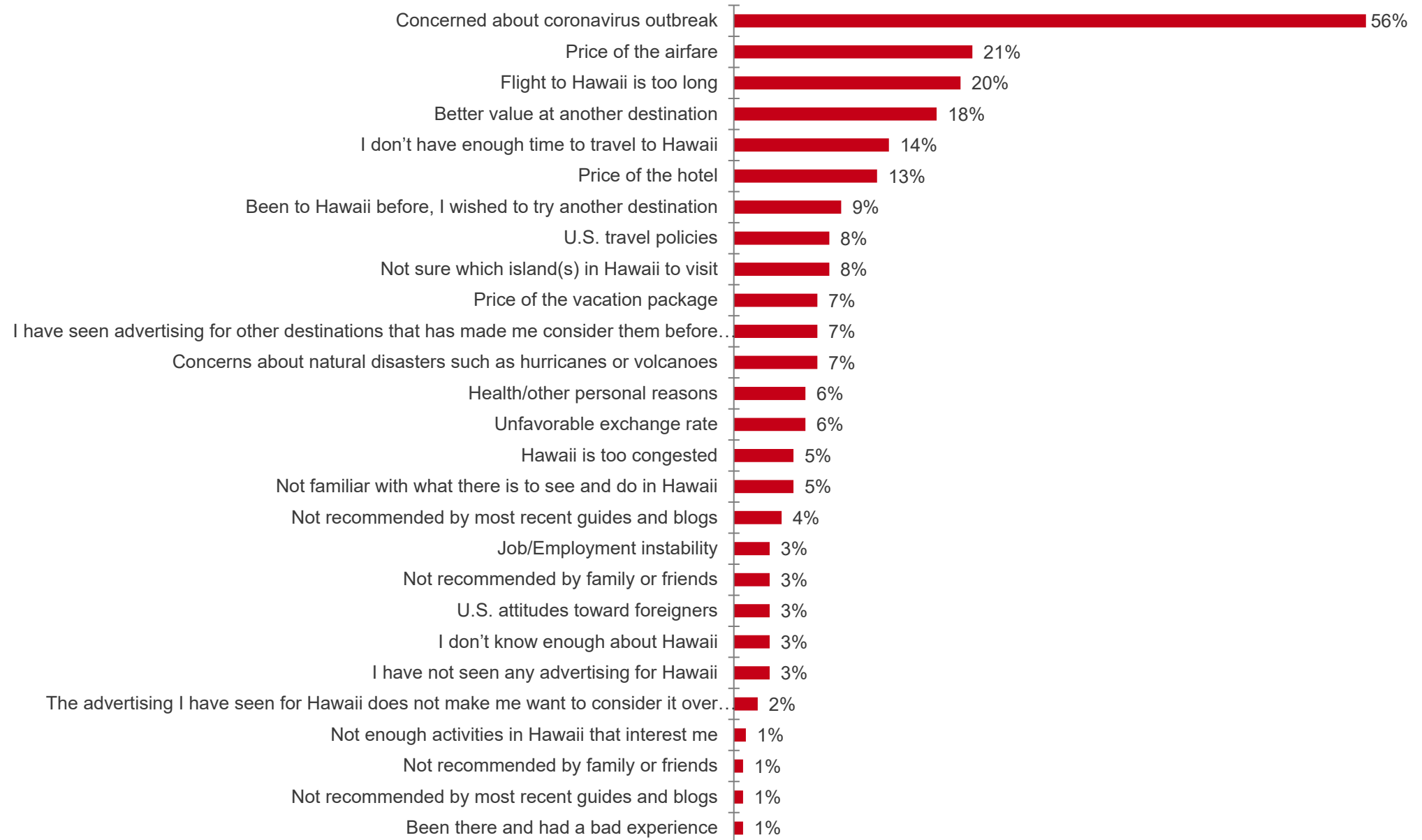
Reasons for Returning to Hawai'i



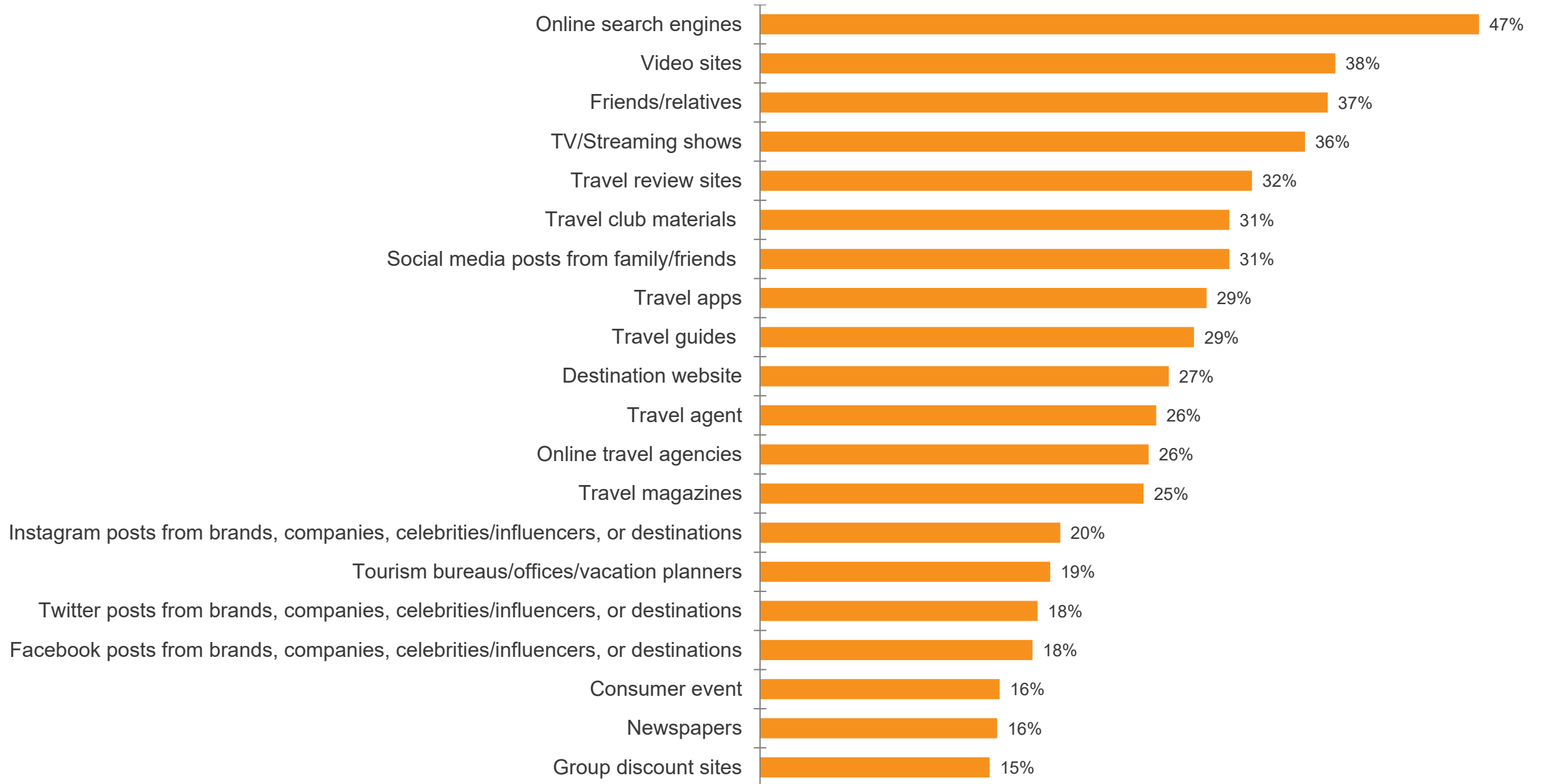
Hawai'i Planned Accommodations



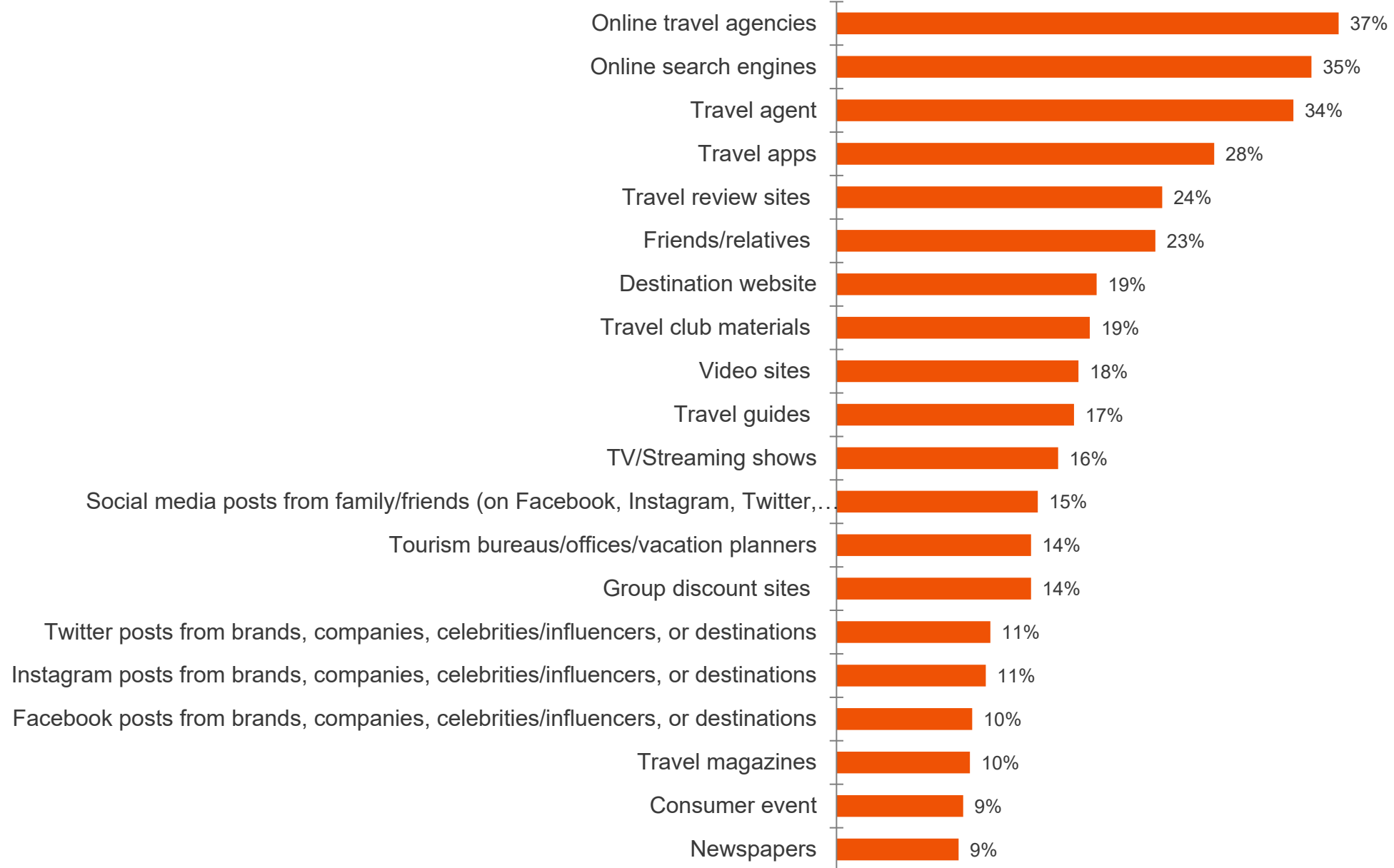
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



Methodology

5

Methodology

Methodology

Target Audience/Markets

- Random sample of U.S., Canada, Japan, and Korea residents
- U.S.: 1,200 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - U.S. West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - U.S. East includes all continental states not in U.S. West region
- Canada: 600 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher
- Japan: 600 sample
 - Traveled internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher (~\$40,000 U.S.D)
- Korea: 600 sample
 - Traveled internationally for leisure in past 24 months with household income of 30,000,000 or higher (~\$26,000 U.S.D)

Timeframe

- Wave 4: Data collection March – April 2020 for media coverage between July – December 2019

Survey Methodology

- Online surveys taken by LSR panelists
- Paid media consumption measured through recognition of ads via TV/video, untagged digital, and social media
- Owned media recognition of Hawai'i channels, including website, YouTube, Facebook, or Instagram
- Earned media recall of articles and stories