



HAWAII MARKETING EFFECTIVENESS

2015-2018 – WAVE 3/6

(INCLUDES 2014-2016 – WAVE 1/2 AND WAVE 2/2)

(NOV 2016)

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RESEARCH OBJECTIVES

The purpose of this study is to measure and evaluate the effectiveness of the marketing efforts conducted by marketing concerns under contract with the Hawai'i Tourism Authority.

This study, conducted since 2003, provides insight into the overall intention to travel to Hawai'i, brand valuation, and measurement of specific, separate attributes for Hawai'i's major marketing areas of U.S. West, U.S. East, Canada and Japan.

The major goals of this study are to understand:

- Consideration of Hawai'i as a destination
- Importance of key attributes
- Preference for Hawai'i
- Preference for Hawai'i by behavioral segments
- Opinions of Hawai'i vs. Competitive destinations for each major marketing area:
 - Eastern U.S. (Florida, Costa Rica, Puerto Rico, California, Mexico, Caribbean, Las Vegas and Europe)
 - Western U.S. (Alaska, Costa Rica, Australia, Mexico, Caribbean, Las Vegas and Europe)
 - Canada (Florida, Arizona, Australia, California, Mexico, Caribbean, Las Vegas and Europe)
 - Japan (Australia, China, Guam/Saipan, Korea, Europe, Taiwan, Singapore, Thailand, Hong Kong)

In addition, the study tracks data on the topics as well:

- Intention to/or actual visits to Hawai'i
- Hawai'i travel patterns and visitor profiles (Accommodations, Length of Stay, Frequency, Satisfaction)
- Indication of reasons for not intending/considering Hawai'i

RESEARCH OBJECTIVES

Online surveys of approximately 15 minutes in length conducted between October 15, 2015 and November 2, 2015, between March 24, 2016 and March 30, 2016 and between December 20, 2016 and December 28, 2016. Each survey was presented in the language of the surveyed country or was localized, if necessary, for countries where English is the primary language.

Qualified respondents from each major marketing area were required to meet specific requirements for inclusion in this study:

- Eastern U.S.
 - Live in the states of North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Texas, Minnesota, Iowa, Missouri, Arkansas, Louisiana, Wisconsin, Illinois, Tennessee, Mississippi, Michigan, Indiana, Kentucky, Alabama, Ohio, West Virginia, Georgia, Florida, Pennsylvania, Virginia, North Carolina, South Carolina, New York, Vermont, New Hampshire, Maine, Massachusetts, Rhode Island, Connecticut, New Jersey, Delaware, Maryland, Washington, D.C.
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of USD \$75,000 or more
 - 18 years of age or older

- Western U.S.
 - Live in the states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of USD \$75,000 or more
 - 18 years of age or older

RESEARCH OBJECTIVES

- Canada
 - Live in the provinces of British Columbia, Alberta and Saskatchewan
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of CDN \$75,000 or more
 - 18 years of age or older

- Japan
 - Live in Japan
 - Have taken and international Leisure trip in the past 24 months
 - Household income of ¥2,000,000
 - 18 years of age or older

Respondents who indicated they intend to travel to Hawai'i within then next 24 months will be re-contacted in March 2018 and November 2018 to determine if a trip was actually made. Actual re-contacts may be lower than reported here due to attrition in the panel.

Respondents are as follows:

Marketing Area	Wave 2 (MAR 2016) Completes	Wave 3 (NOV 2016) Completes	Wave 2 Re-contact in MAR 2018	Wave 3 Re-contact in NOV 2018
Eastern U.S.	602	602	152	193
Western U.S.	600	601	321	322
Canada	601	601	268	245
Japan	600	600	244	248

RESEARCH OBJECTIVES

For some analyses respondents are segmented depending on how they responded to questions regarding the importance of certain destination characteristics they consider when making travel decisions. Following are the definitions for each segment. Respondents must have provided a rating of 4 or 5 for at least one characteristic in each segment.

Segments were revised with Wave 1 in November 2015, thus no prior wave data is presented.

Explore/ Learn	Relax/ Re-energize	Culture/ Authenticity	Activity/Nature	Foodie	Togetherness	Indulge
I can explore and do new things	It's a great chance to rest and relax	To gain knowledge of history	To seek adventure	To indulge my passion for food and fine cuisine	To spend more quality time with my spouse/family	I can be more extravagant when I travel
To be the first among my friends to do something	I feel alive and energetic when I travel	To experience other cultures	To do activities I can only do on vacation		To spend more time with my friends	I can splurge on myself when I travel
To learn new things	To engage in my hobbies	To see for myself, the authentic things I have read or heard about	To be outdoors and experience nature		To celebrate or mark a special occasion	

RESEARCH OBJECTIVES

Inclusion in each segment is based on the responses for each attribute within the segment, thus a respondent may respond to more than one characteristic across multiple segments. Therefore, while the response is counted only once, the respondent may be counted multiple times. Sample sizes for each segment are shown in the table below.

		Eastern U.S.	Western U.S.	Canada	Japan
Explore/Learn	NOV 2016	514	519	471	478
	MAR 2016	486	498	488	466
Relax/Re-energize	NOV 2016	541	541	513	505
	MAR 2016	535	513	542	509
Culture/Authenticity	NOV 2016	491	524	481	495
	MAR 2016	470	490	482	473
Activity/Nature	NOV 2016	502	518	460	421
	MAR 2016	488	459	475	419
Foodie	NOV 2016	328	335	236	422
	MAR 2016	242	274	237	414
Togetherness	NOV 2016	524	527	479	459
	MAR 2016	498	486	488	454
Indulge	NOV 2016	333	355	226	410
	MAR 2016	246	247	252	389

Data will be presented in five major sections. The first section includes a Summary of the current Wave (NOV 2016), comparing relevant data from each of the four market areas. This will be followed by detailed data for each market area – Eastern U.S., Western U.S., Canada and Japan showing each of the past 5 waves (NOV 2014, MAR 2015, NOV 2015, MAR 2016, and NOV 2016) separately, except for Destination Attributes as they apply to Hawai'i specifically. For these charts, data is presented for all waves back to Q2 of 2009. The exact wording of the survey question used to compile each chart is included at the bottom of each chart within the individual market area sections.

Excluding the Summary section, charts in each set of the market sections appear in the identical order. Since the Summary section includes only data that can be compared across all markets, some charts have been excluded; the progression, however is maintained. Charts in each market section appear in the following order:

- Demographics – Age
- Demographics – Median Age
- Demographics – Income
- Demographics – Median Income
- Demographics – Sexual Orientation
- Demographics – Long Distance Overnight Trips in Past 12 Months (Past 24 Months for Japan)
- Demographics – Median Number of Long Distance Overnight Trips in Past 12 Months (*Past 24 Months for Japan*)
- Destination Consideration for Next Leisure Vacation
- Reasons for Taking a Leisure Vacation
- Attributes Important in Choosing a Destination
- Attributes Important in Choosing a Destination (Importance vs. Applies to Hawai'i)
- Attributes Important in Choosing a Destination – Segment Comparisons

- Destination Attributes – Competitive Comparisons (*competitive destinations vary by market*)
- Destination Attributes – Applies to Hawai'i
- Impression of Hawai'i
- Impression of Hawai'i by Segment
- Hawai'i Visitation by Segment
- Hawai'i Planned Visitation by Segment
- Visitation – Competitive Destinations
- Planned Visitation – Competitive Destinations
- Planned Visitation to Islands of Hawai'i
- Planned Accommodations
- Planned Accommodation Location
- Reasons for Not Visiting Hawai'i
- Lifetime Visits to Hawai'i
- Reasons for Returning to Hawai'i
- Reasons for Returning to Hawai'i – Segment Comparisons
- Year Last Visited Hawai'i
- Month Last Visited Hawai'i
- Islands' Share of Nights in Hawai'i
- Number of Nights in Hawai'i
- Average Spending in Hawai'i
- Travel Party Size
- Travel Party Composition
- Hawai'i Excellent Rating
- Likelihood of Returning to Hawai'i

NOVEMBER 2016 HIGHLIGHTS

- The age distribution remains fairly unchanged with Canadians, at 50, getting a little older compared to the spring wave (47). Eastern travelers are right behind Canadians dropping a year to 45 years of age, while Western travelers increased to 44, (an increase from the previous wave), the same age as the Japanese travelers.
- Travelers to Hawai'i from all markets tend to be more affluent as their average annual household incomes exceed the national averages in each of their respective countries. In the U.S., incomes for travelers from the Eastern part of country declined slightly, but is still the highest among all travelers. The incomes of Western U.S., Canadian and Japanese travelers have all risen however.
- The percentage of LGBT travelers remains low and has declined across all origins. In the current wave LGBT travelers are equally as likely to come from any of the other geographies.
- Travelers in this study claim to have taken at least 2 long distance overnight trips in the past 12 months, but those from the Western U.S. have taken the most with an average of 2.98, followed by the Eastern U.S. at 2.74 trips. The number of trips taken increased across all geographies.
- Hawai'i is in the most considered leisure destination among Canadian travelers and is tied for number two among Western U.S. and Japanese travelers. Among Eastern U.S. travelers Hawai'i has moved up from number six to number five in consideration behind the Las Vegas, Caribbean, Florida and California. It is interesting to note that, for U.S. residents, international destinations including European destinations have fallen down in the list, which may be an indication of travelers reactions world events.
- The top reasons U.S. residents travel continues to be to explore and do new things and to spend more quality time with their spouses or families. Both Canadian and Japanese travelers consider travel as a chance to rest and relax. Canadians also like to explore and do new things, while Japanese travelers like to experience other cultures.

NOVEMBER 2016 HIGHLIGHTS

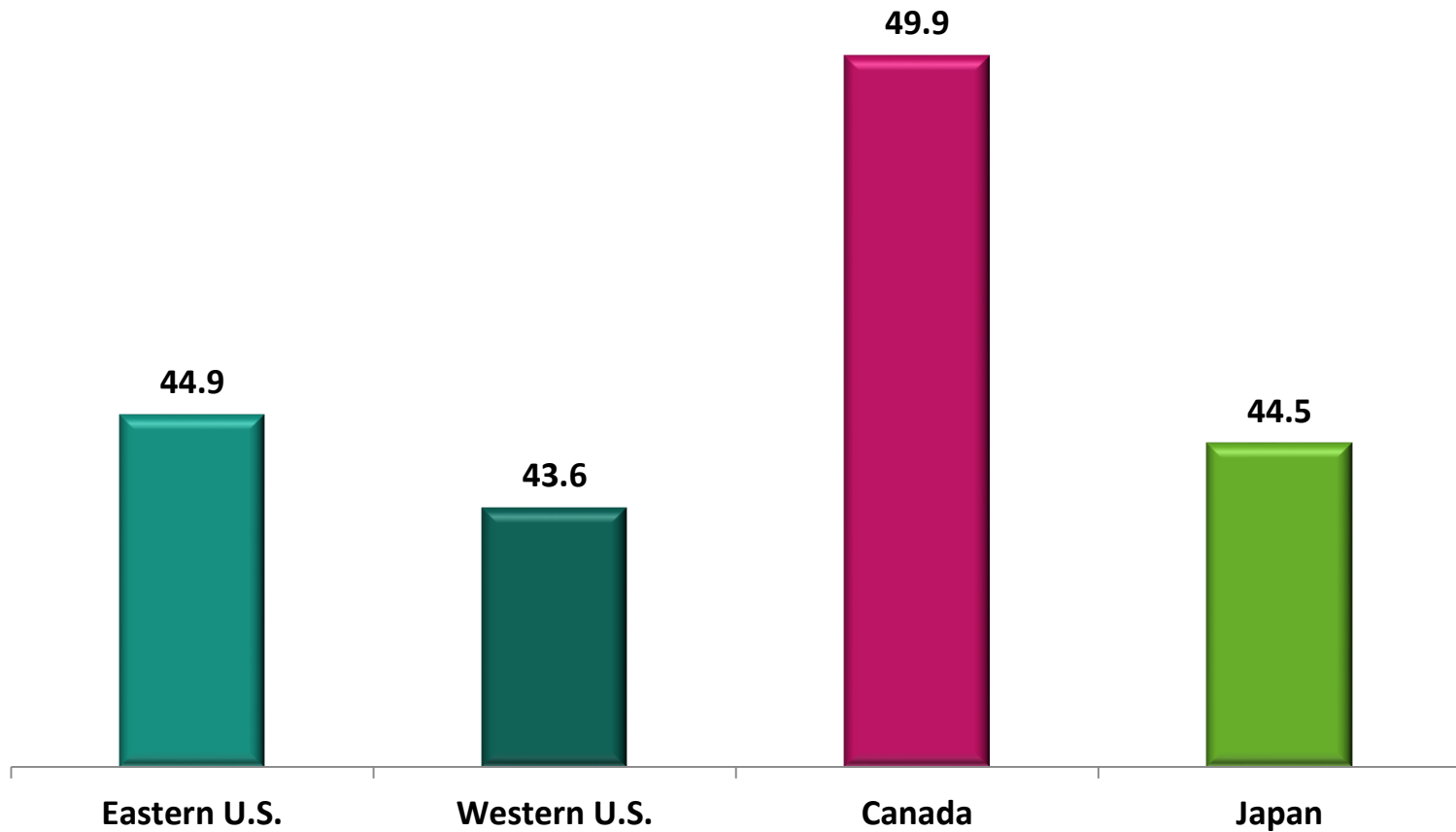
- Among the 20 attributes (22 for the Japan market) important in choosing a leisure destination, Hawai'i meets or exceeds expectations among all visitors excluding those from Eastern U.S. origins as being a good place for family and children and among the Western U.S. and Canadian visitors as being romantic. Hawai'i also meets or exceeds expectations among Japanese visitors in ease of communicating in my native language and as offering experiences with native people and their cultures.
- While there is variance among the markets, most have the consistent impression that Hawai'i is able to deliver high levels of recreational activities (including water sports, zip lining, snorkeling, hiking, biking, etc.), relaxation and romance, and State or National parks and beaches. Shopping also continues to be rated highly among the Japanese market.
- Around 20% of visitors from the Western U.S. and Japanese origins have visited Hawai'i in the past 12 months with an additional 13% to 24% visiting in the past 24-36 months. While the percentage has risen, only 11% of Eastern U.S. visitors have visited in the past 12 months with an additional 10% visiting the past 24-36 months. The percentage of Canadian visitors who have visited in the past 12 months has dropped to 14% (from 20%), while those visiting in the past 24-36 months has increased from 15% to 19%.
- Visitors from the Eastern U.S. are most likely to visit Hawai'i in the Spring or Summer, while those from the Western U.S. and Japan prefer Summer than Spring. Canadians overwhelmingly prefer to visit Hawai'i in the Winter, followed by Spring.
- More than one-third of visitors from the Western U.S plan to visit Hawai'i in the next 12 months with an additional 17% planning to visit in the next 13-24 months. About 30% of Japanese, 25% of Canadian and 20% of Eastern U.S. travelers plan to visit in the next 12 months. The primary reason Eastern U.S. visitors seem to be lagging behind the other markets is the cost of airfare as well as the time a trip to Hawai'i from the Eastern U.S. requires. The number of Canadians planning to travel in the next 12 months has dropped off primarily because they feel other destinations are a better value and the Japanese feel that the exchange rate is unfavorable.
- Among those who are planning to visit the State, Maui is on the top of the list, except for Japanese visitors who overwhelmingly plan to visit O'ahu followed by Hawai'i. This is likely due to their high opinions of the shopping in Hawai'i.

NOVEMBER 2016 HIGHLIGHTS

- Visitors from all markets primarily plan to stay in a hotel. It is not surprising that the majority of all traveler groups plan to stay at a resort location. All groups are venturing out with more of them reporting planned accommodations in non-resort localities.
- As might be expected, at five visits, travelers from the Western U.S. have made the most lifetime visits to Hawai'i, followed by Canadian and Japanese visitors at almost four lifetime visits. Visitors from the Eastern U.S. have only made just over three visits to Hawai'i in their lifetimes.
- Visitors from all four markets keep returning to Hawai'i because of its stunning natural beauty, the great weather and great beaches. They also feel it is safe place to visit.
- Excluding the Western U.S. , the majority of travel parties from each origin are couples followed by families. Just the opposite is true for travel parties from the Western U.S. where the majority of travel parties are families followed by couples.
- At about \$4,400, visitors from Japan spent the most on their last trip to Hawai'i. This is not simply due to travel party size, as almost twice as much of their travel dollar goes to shopping than it does among any of the other traveler groups. Despite increases in party size, average spending has declined among travelers from the Eastern U.S. and Canada. This may be due to a decrease in the number of nights they stayed on their most recent trip to Hawai'i. Spending by Western U.S. travelers has increased as has their party size and length of stay.
- Visitors from all four markets rate their last visit to Hawai'i higher than 6 on an excellence scale of 8 and between 24% and 44% say they are very likely to return in the next 24 months. About half of the Eastern U.S. visitors say they are somewhat or very likely to return to Hawai'i in the next 24 months.

NOVEMBER 2016 SUMMARY - ALL MARKETS

DEMOGRAPHICS - AGE



QS3. Which of the following categories includes your age?

DEMOGRAPHICS – AVERAGE HOUSEHOLD INCOME

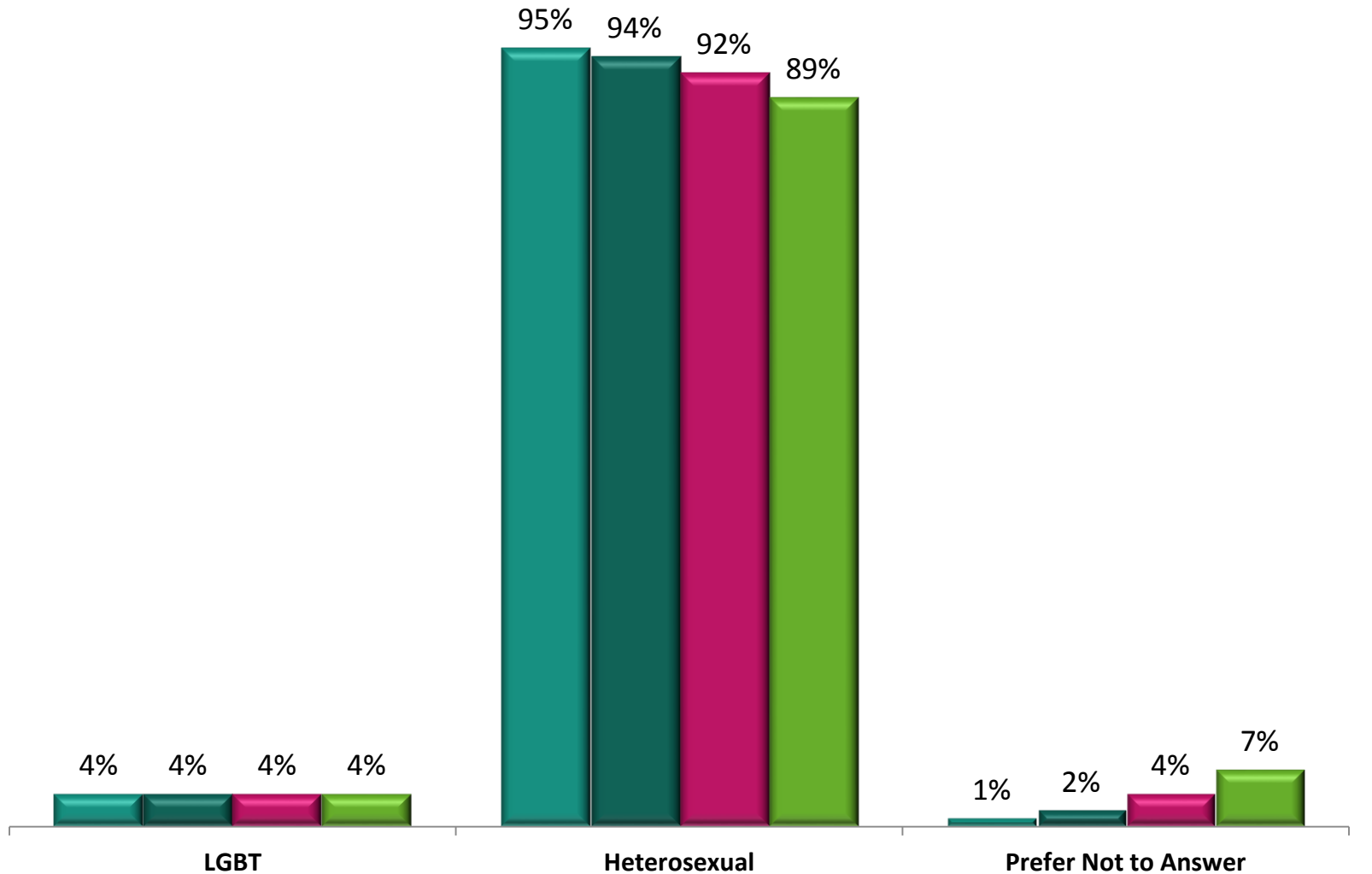
Respondents were asked to provide Annual Household Income in the currency of their country. Following are the Average Household Incomes of respondents from each region or country.

- **Eastern U.S.** (U.S. Dollars) **\$142,000**
- **Western U.S.** (U.S. Dollars) **\$140,000**
- **Canada** (Canadian Dollars) **\$133,000**
- **Japan** (Japanese Yen) **¥849**

Travelers to Hawai'i tend to be more affluent as their Average Annual Household Incomes exceed the national averages in each of their countries.

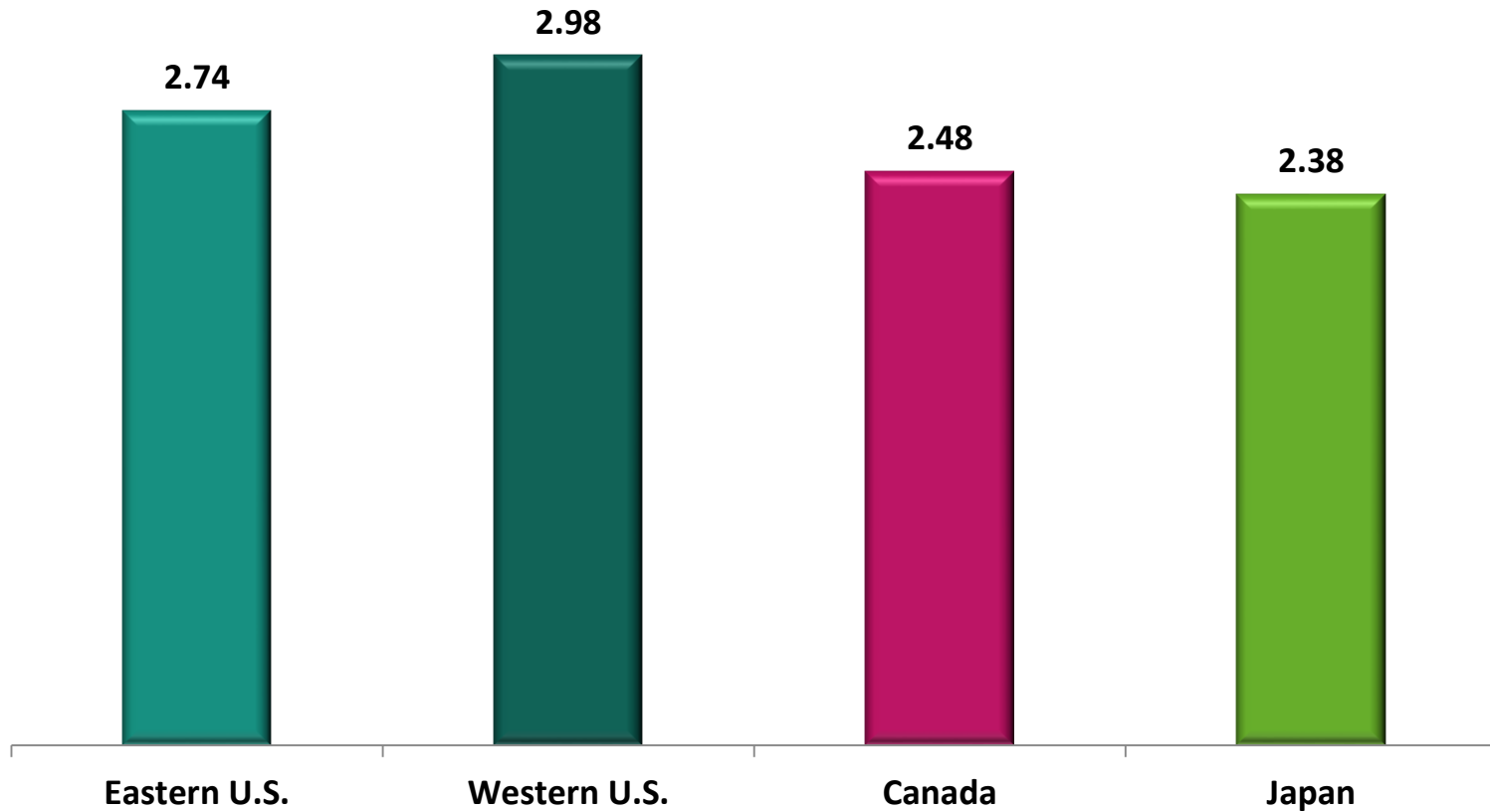
DEMOGRAPHICS – SEXUAL ORIENTATION

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



QS5. Do you consider yourself to be: LGBT, Heterosexual, Prefer not to answer

DEMOGRAPHICS – AVERAGE NUMBER OF LONG DISTANCE OVERNIGHT TRIPS IN PAST 12 MONTHS



Q1. How many overnight leisure trips of 500 miles or more have you taken by air in the past 12 months?

DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

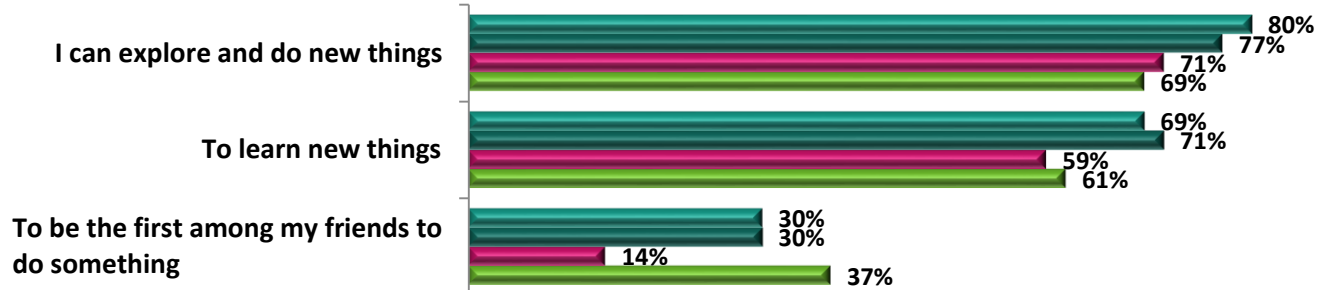
Eastern U.S.	Western U.S.	Canada	Japan
1. California (42%)	1. Las Vegas (37%)	1. Hawai'i (33%)	1. Europe (32%)
2. Florida (40%)	2. Hawai'i (36%)	2. Mexico (33%)	2. Hawai'i (31%)
3. Caribbean (38%)	3. France (29%)	3. Europe (33%)	3. Australia (31%)
4. Las Vegas (33%)	4. Alaska (28%)	4. California (31%)	4. Taiwan (27%)
5. Hawai'i (24%)	5. Australia (28%)	5. Caribbean (28%)	5. Singapore (23%)
6. U.K. (18%)	6. Caribbean (27%)	6. Las Vegas (27%)	6. Guam/Saipan (19%)
7. Italy (17%)	7. U.K. (27%)	7. Other (23%)	7. Hong Kong (17%)
8. France (16%)	8. Italy (22%)	8. Arizona (16%)	8. Thailand (17%)
9. Mexico (16%)	9. Other Europe (20%)	9. Florida (16%)	9. Korea (15%)
10. Other (16%)	10. Mexico (18%)	10. Australia (11%)	10. China (12%)
11. Other Europe (14%)	11. Other (18%)	No Trip Considered (3%)	11. Other (8%)
12. Germany (12%)	12. Germany (17%)		No Trip Considered (8%)
13. Costa Rica (11%)	13. Costa Rica (13%)		
14. Puerto Rico (11%)	14. Switzerland (12%)		
15. Switzerland (9%)	No Trip Considered (4%)		
16. Cuba (7%)			
No Trip Considered (3%)			

Q3: Please indicate which of the following destinations you are considering for your next leisure vacation, including those that you might visit on a cruise.

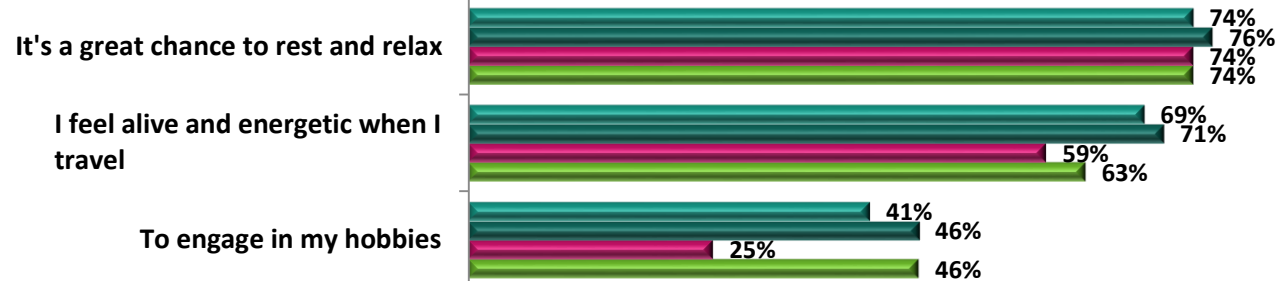
REASONS FOR TAKING A LEISURE VACATION ANYWHERE (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

EXPLORE/LEARN



RELAX/RE-ENERGIZE



CULTURE/AUTHENTICITY



Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

REASONS FOR TAKING A LEISURE VACATION ANYWHERE (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

ACTIVITY/
NATURE



FOODIE



TOGETHERNESS

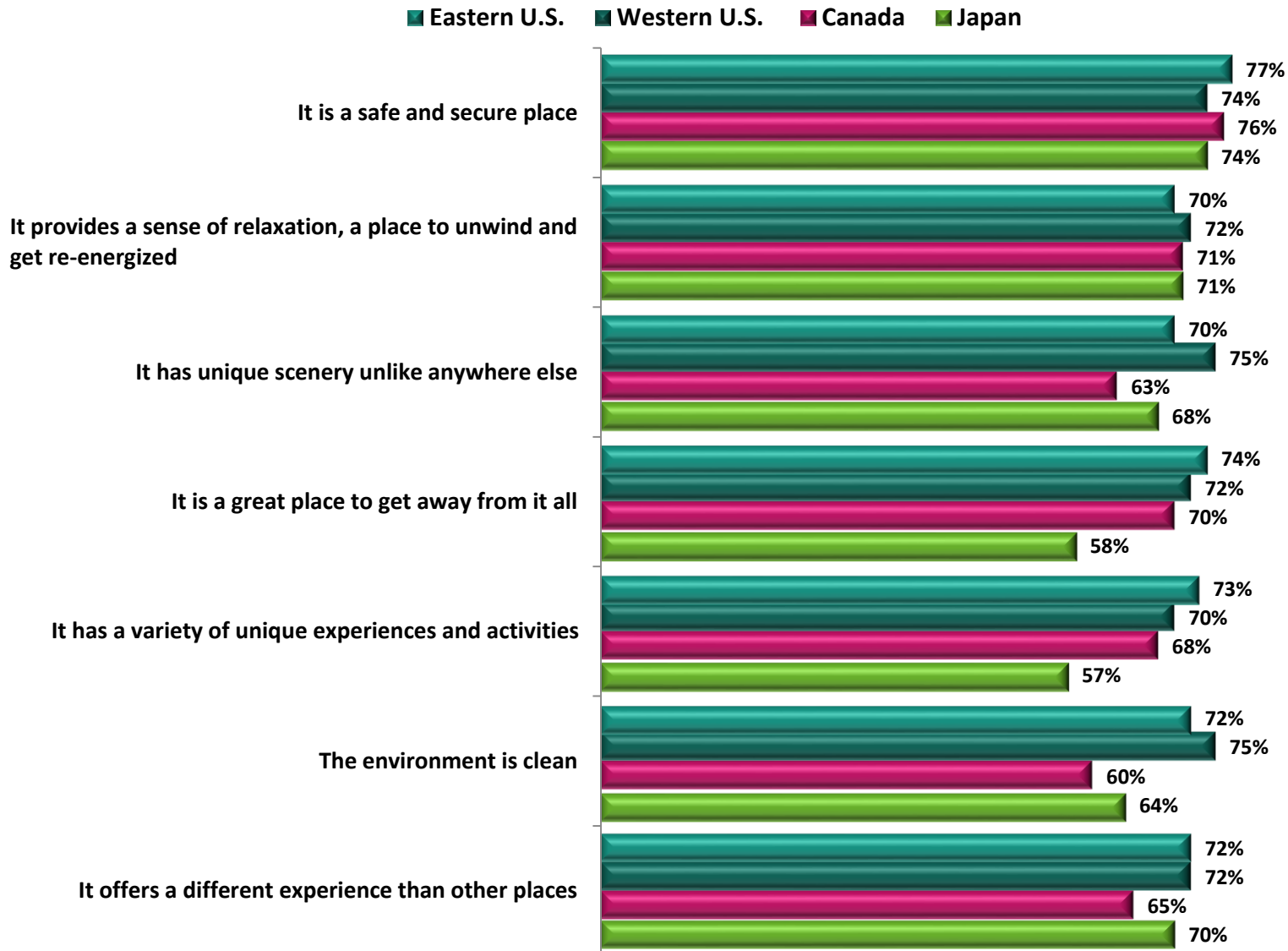


INDULGE



Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

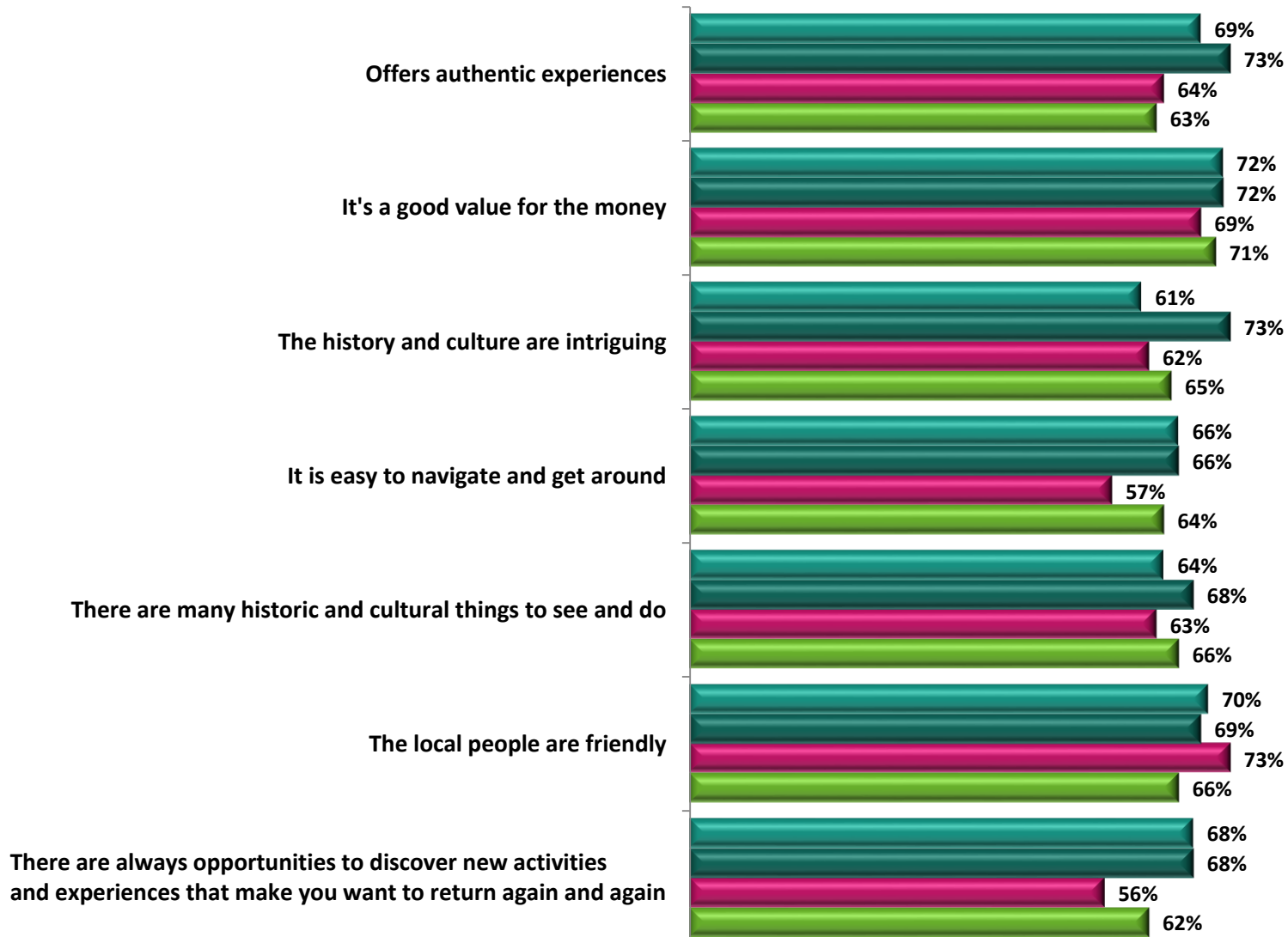
ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)



Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)

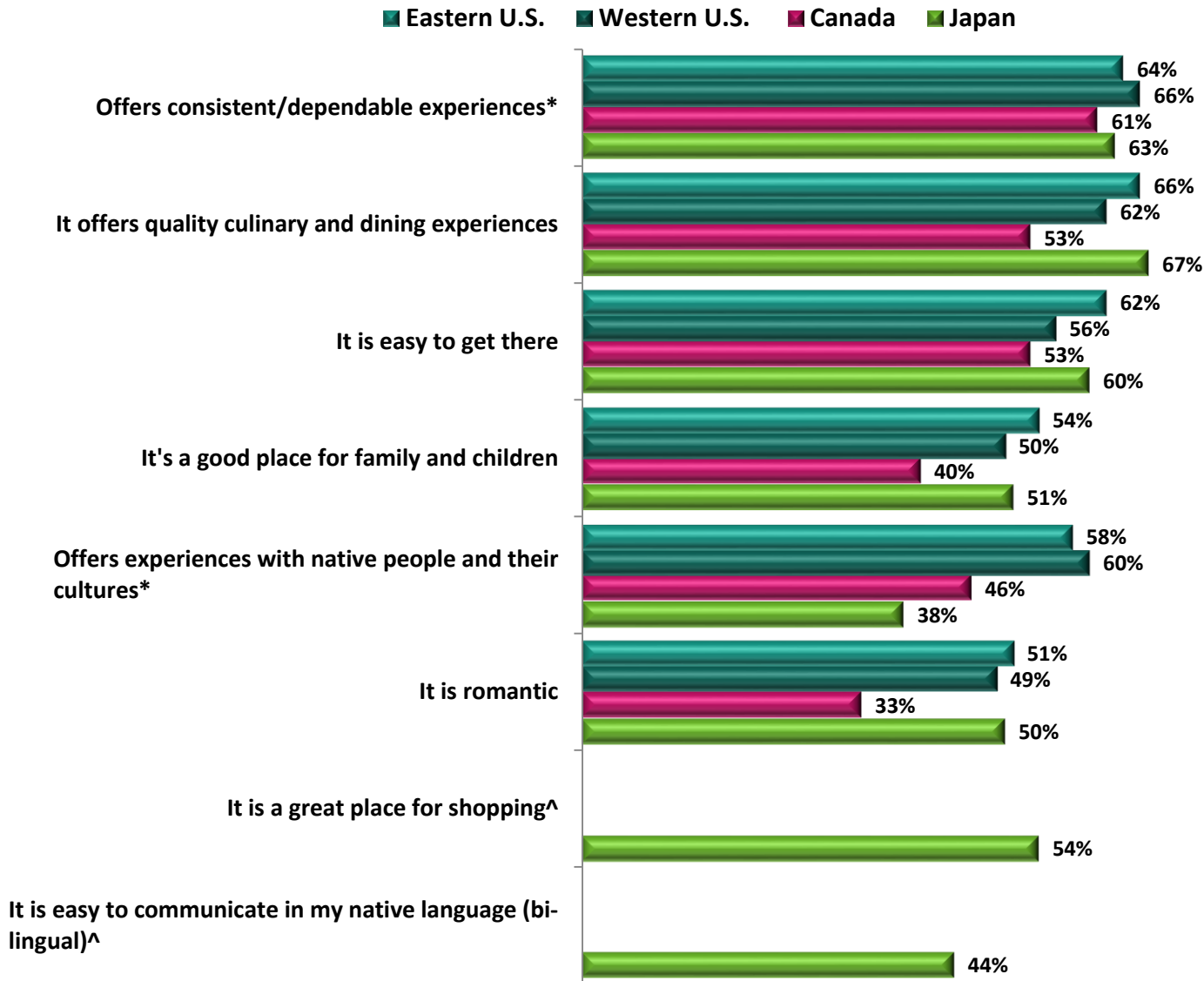
ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)

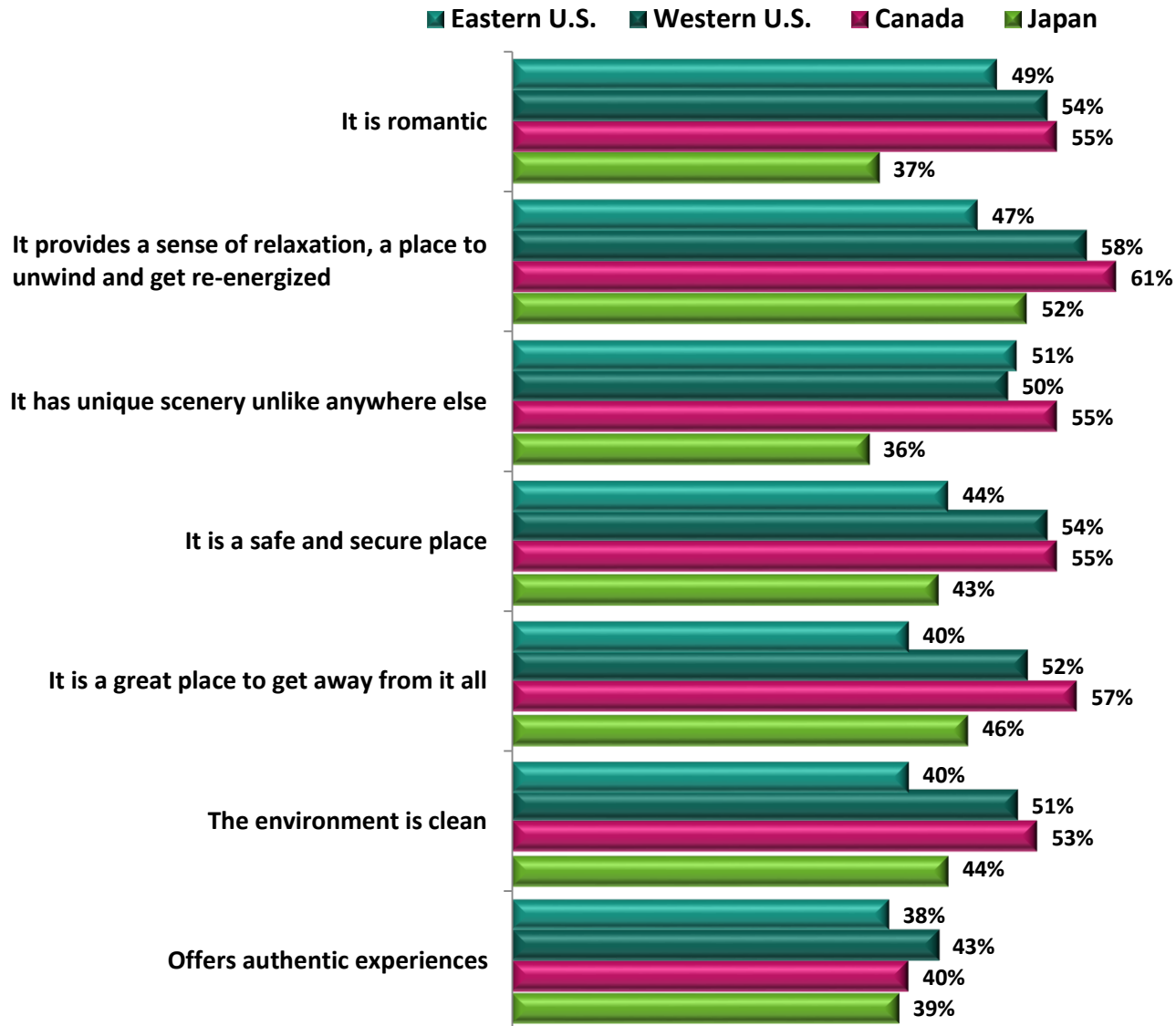
ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)

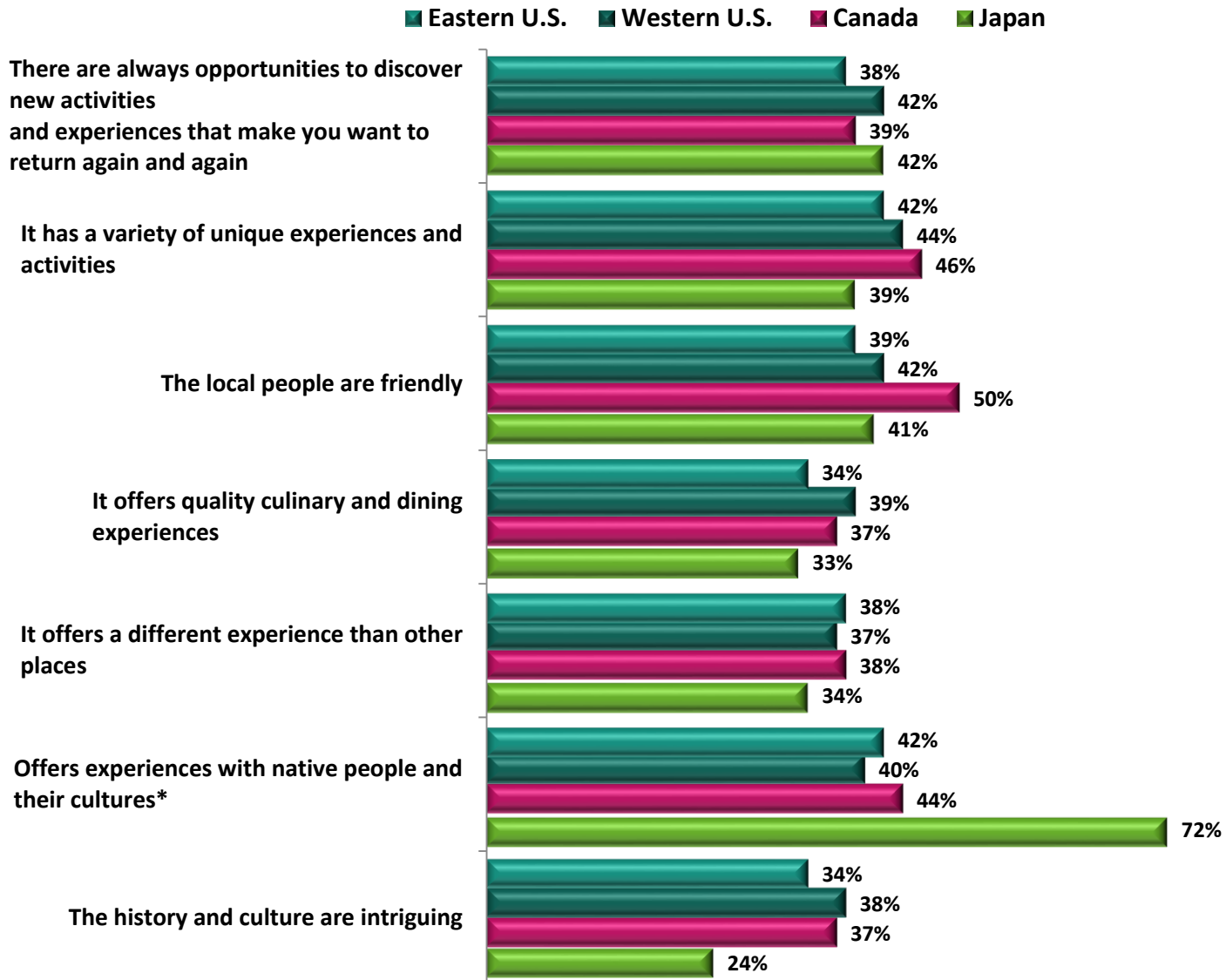
^Asked of Japan Only * Added in NOV 2015

HAWAII PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)



Q6a: For each attribute, please select the destination(s) to which it applies.

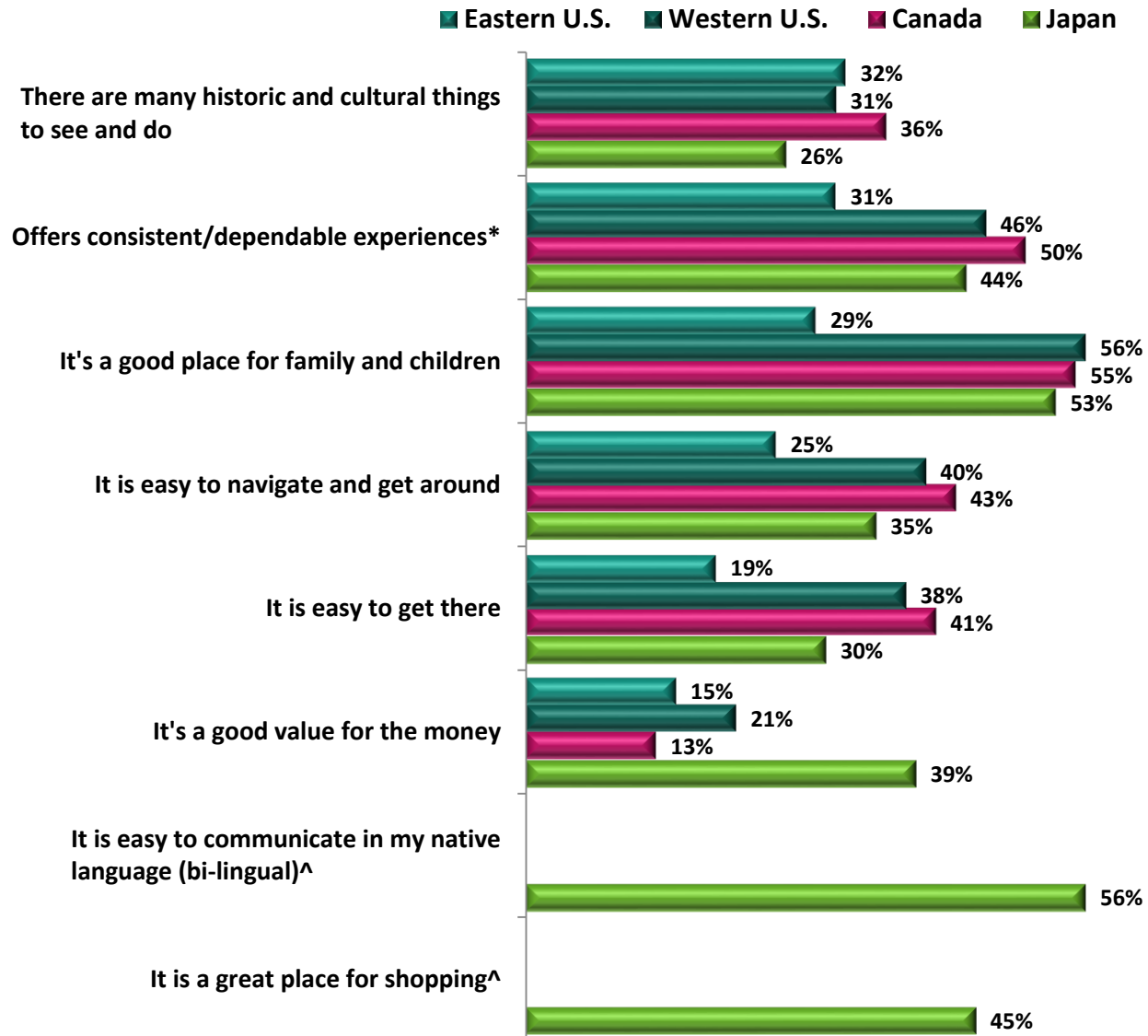
HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



Q6a: For each attribute, please select the destination(s) to which it applies.

* Added in NOV 2015

HAWAII PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



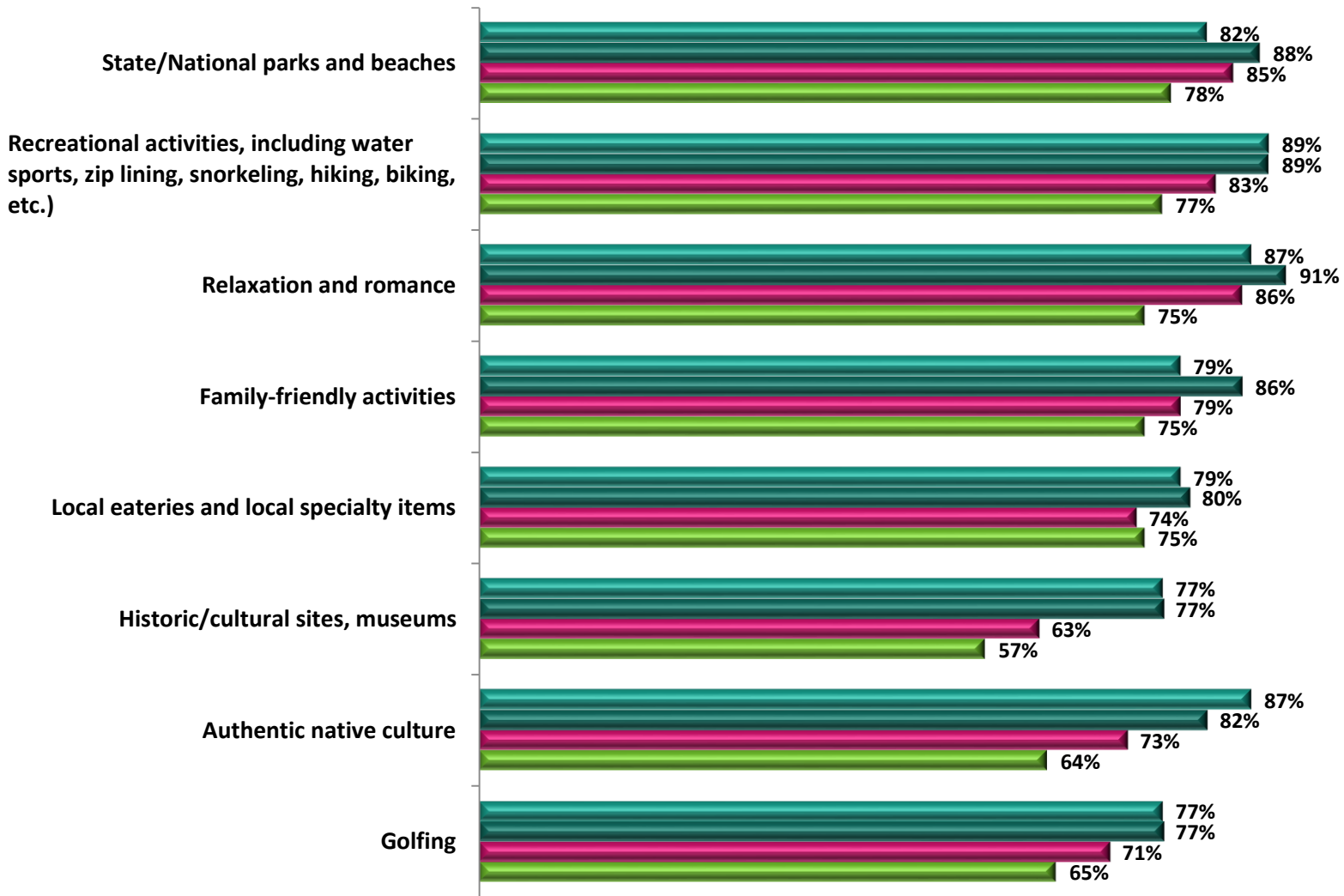
Q6a: For each attribute, please select the destination(s) to which it applies.

^ Asked of Japan Only

* Added in NOV 2015

IMPRESSION OF HAWAII' I (% TOP 2 BOX)

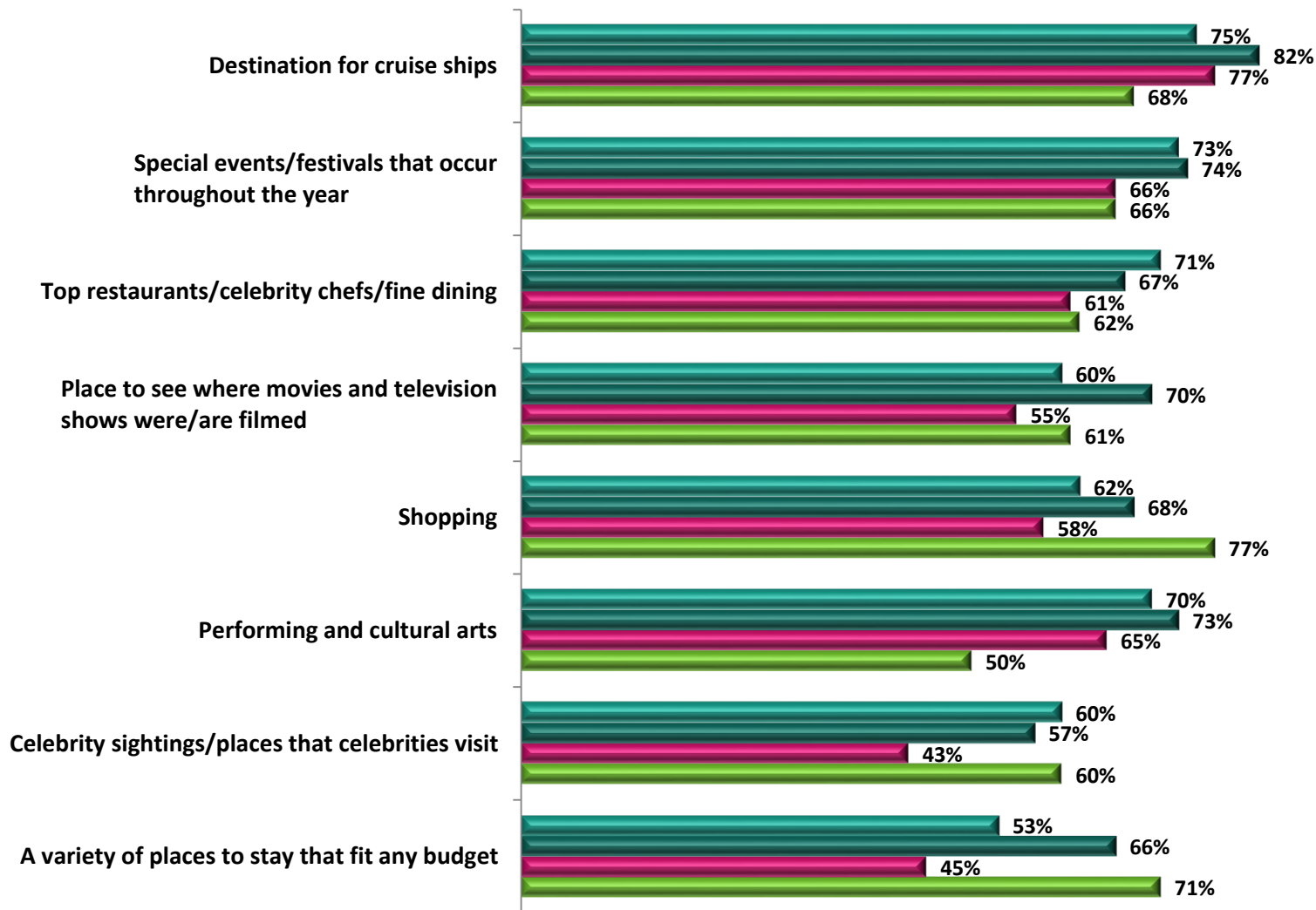
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

IMPRESSION OF HAWAI'I (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



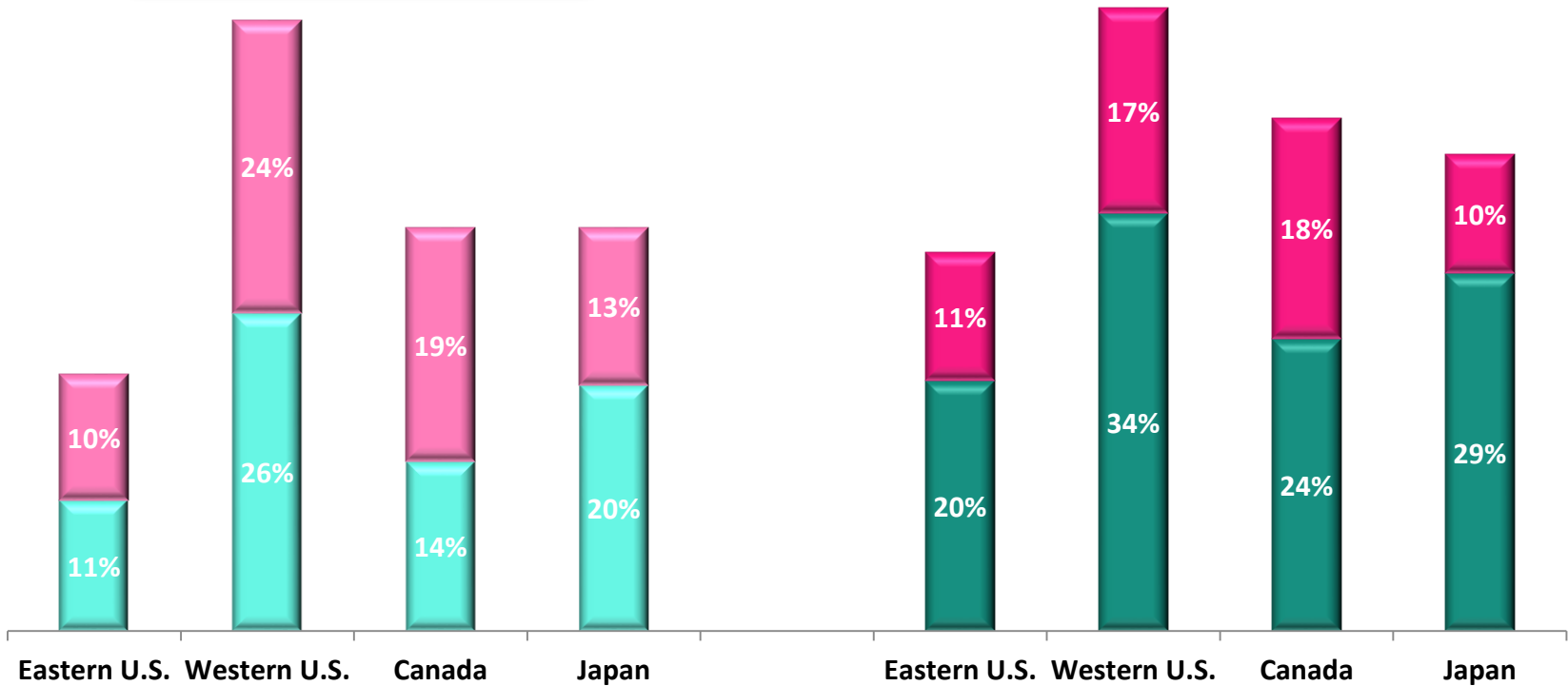
Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

HAWAI'I VISITATION FREQUENCY

- Visited Past 12 Months
- Visited Past 13-36
- Plan to Visit Next 12 Months
- Plan to Visit Next 13-24 Months

Visited Past 36 Months

Plan to Visit Next 24 Months

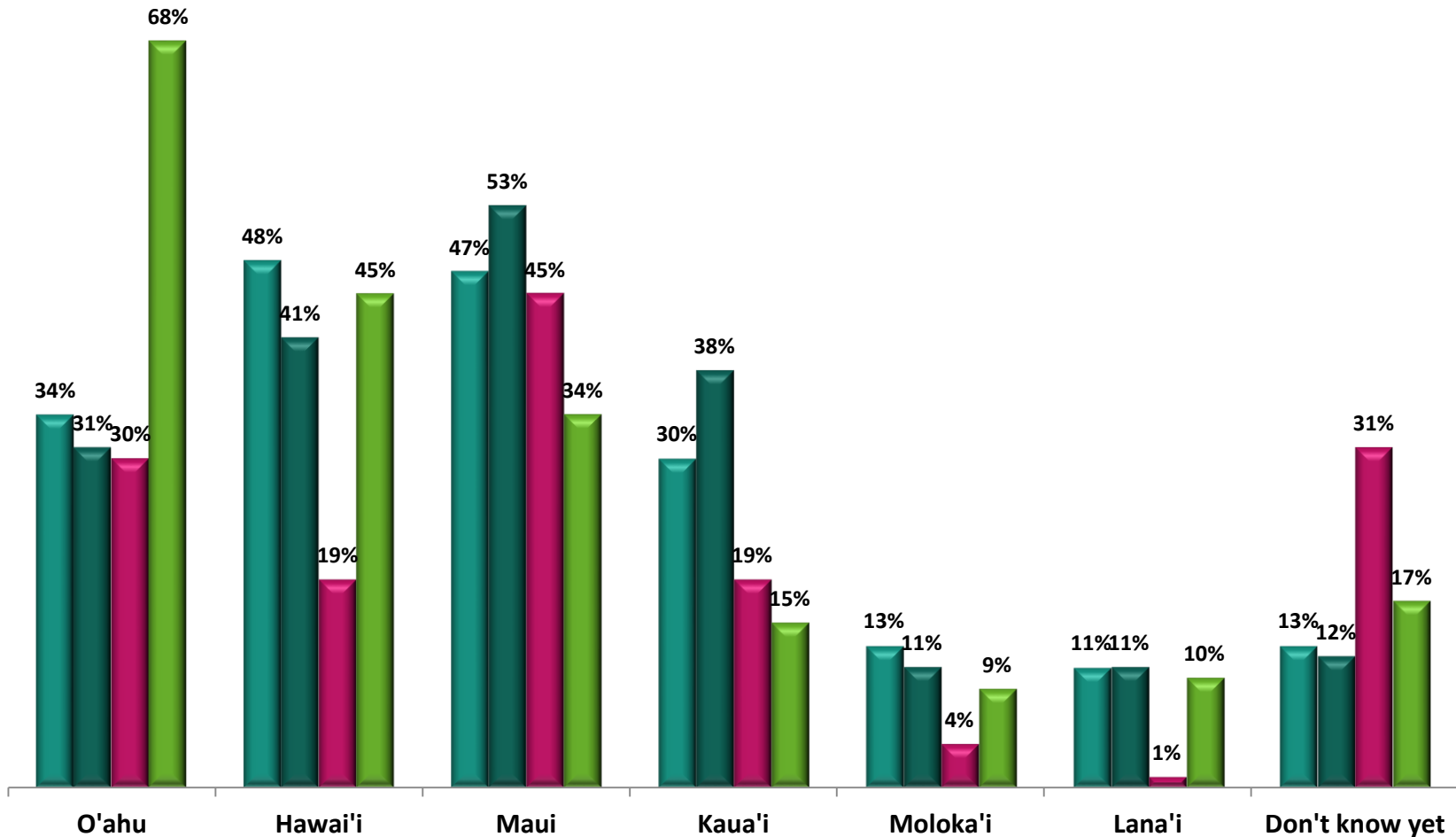


Q8a/b: Please indicate whether or not you visited each of the following destinations for leisure within the PAST 3 YEARS/PAST 12 MONTHS.

Q9a/b: Please tell us for each of the following destinations whether or not you plan to visit them for leisure within the NEXT 24 MONTHS/NEXT 12 MONTHS.

PLANNED VISITATION TO ISLANDS OF HAWAI'I (AMONG THOSE PLANNING TO VISIT IN NEXT 24 MONTHS)

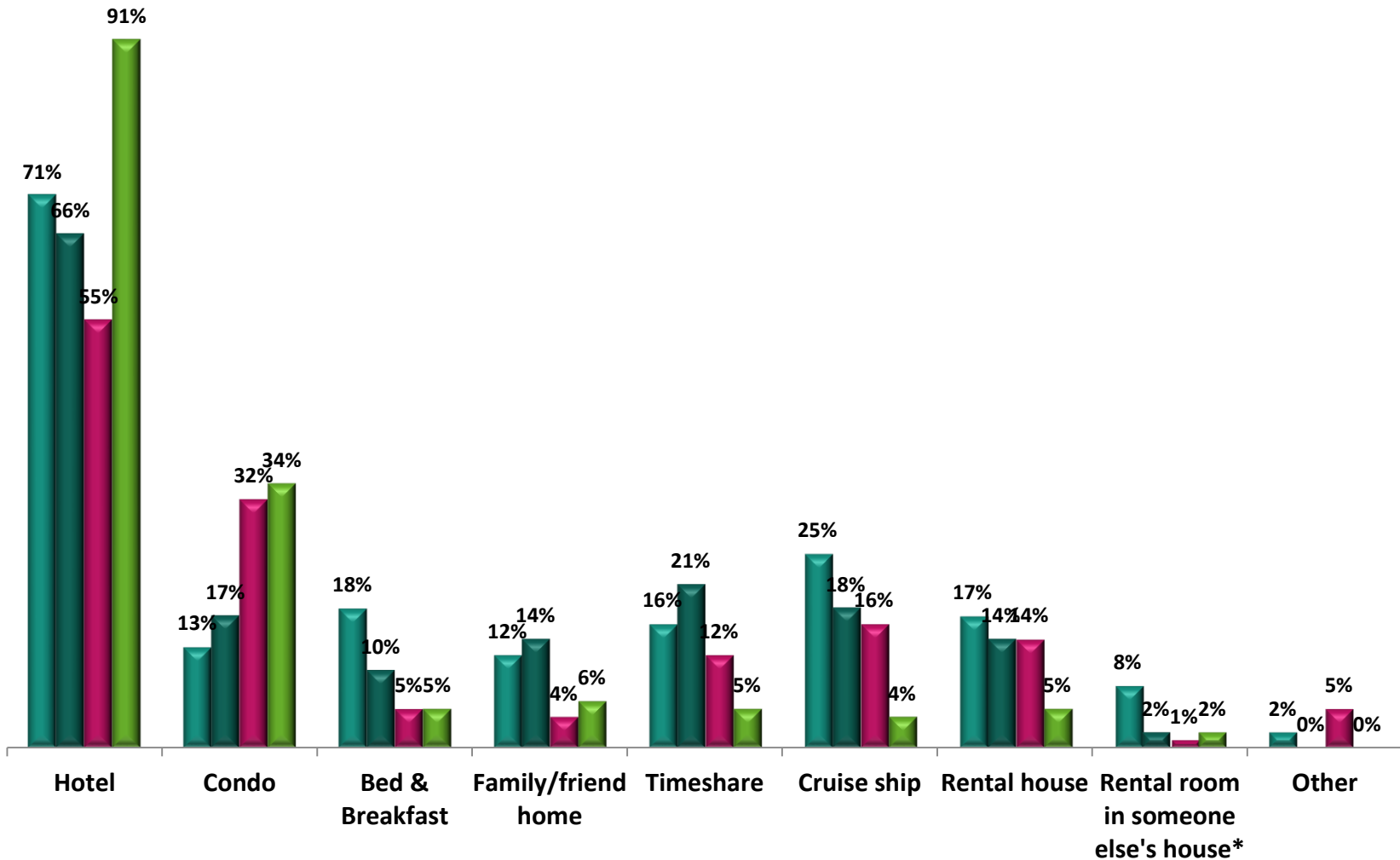
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q9c: You indicated that you are planning to visit Hawai'i in the next 24 months. Which islands do you plan to visit?

PLANNED ACCOMMODATIONS (AMONG THOSE PLANNING TO VISIT HAWAI'I IN NEXT 24 MONTHS)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

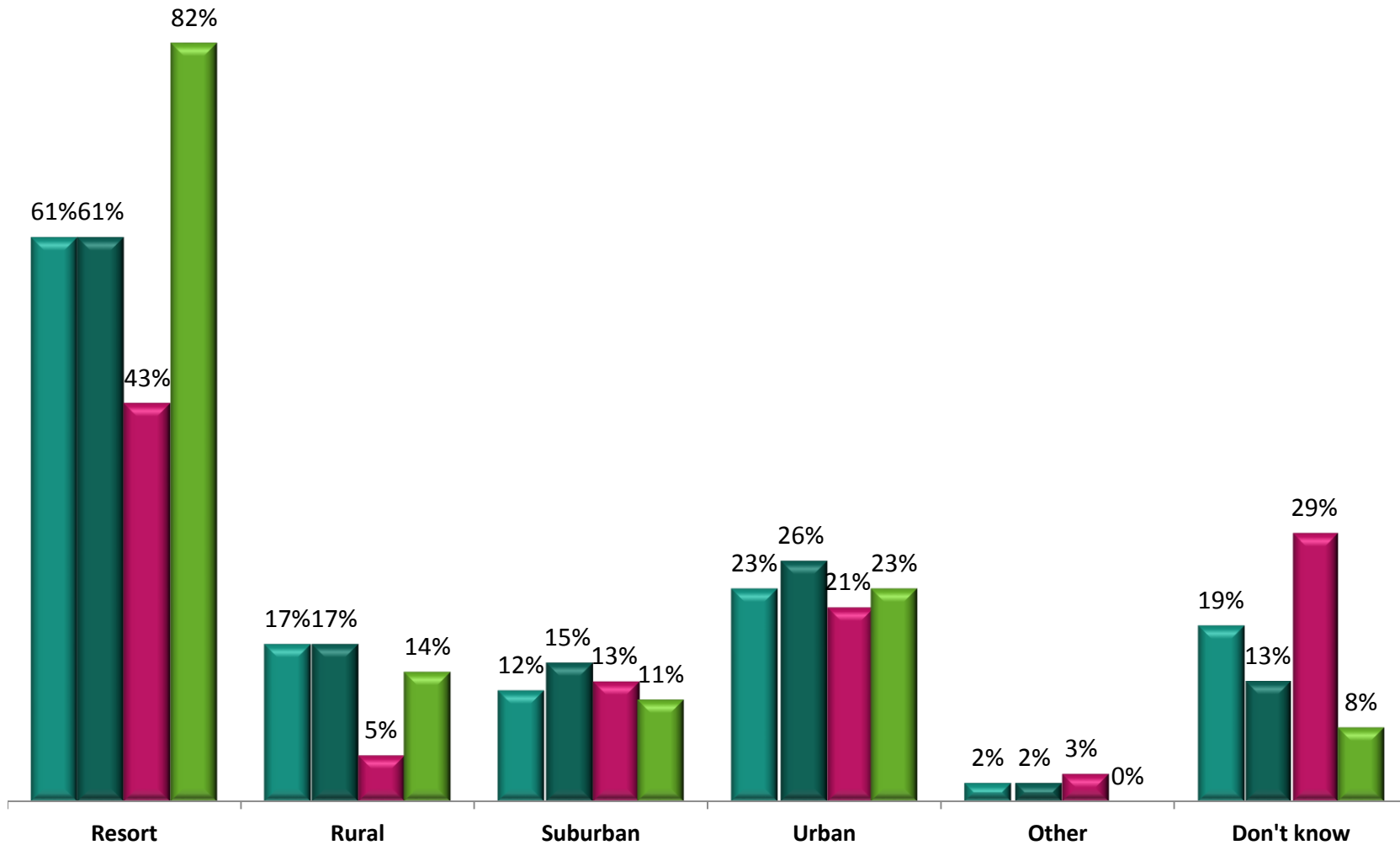


Q9d: You indicated that you are planning to visit Hawai'i in the next 24 months. What type of accommodation(s) do you plan to stay?

*Asked starting in MAR 2015

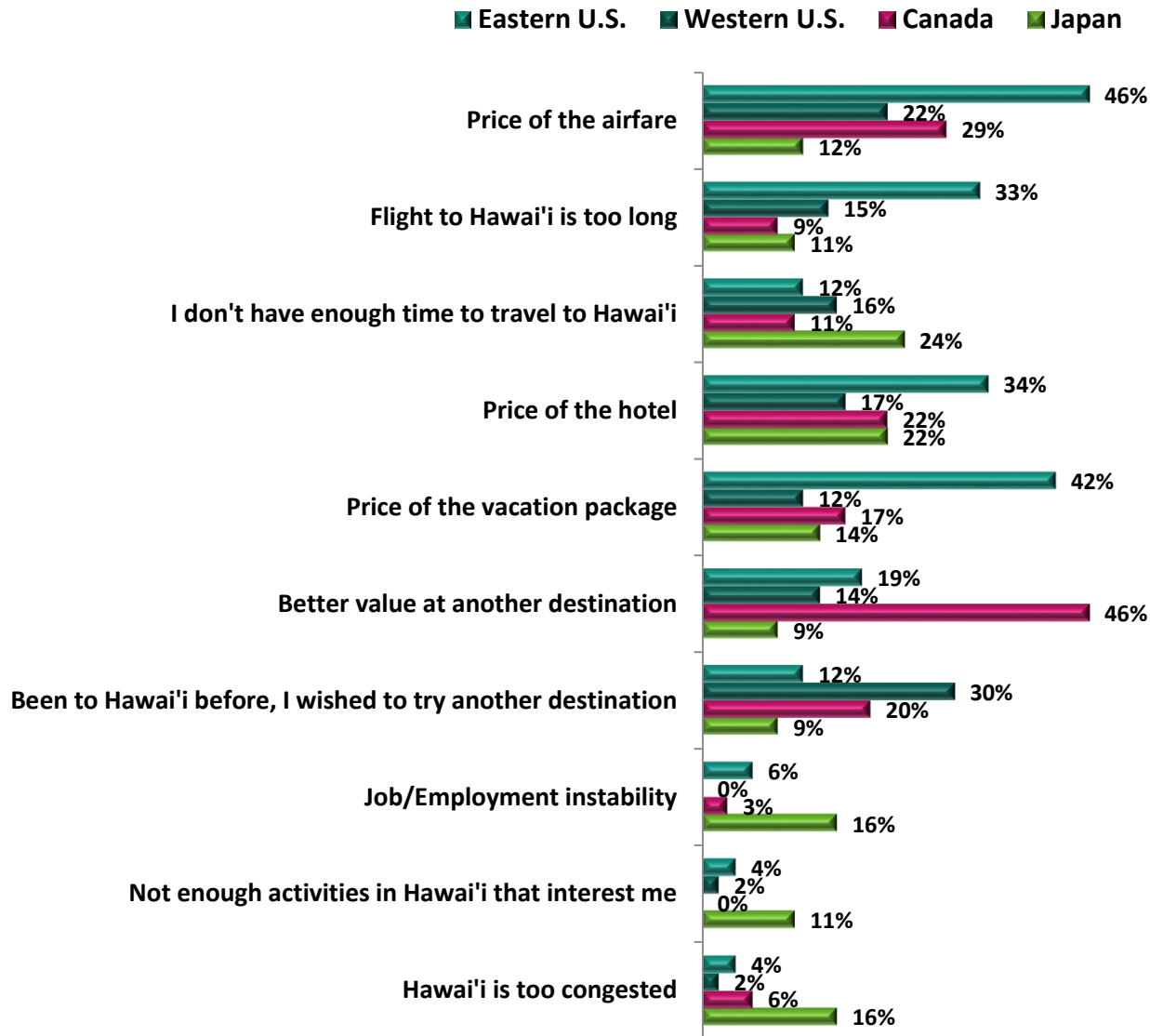
PLANNED ACCOMMODATION LOCATION (AMONG THOSE PLANNING TO VISIT HAWAII IN NEXT 24 MONTHS)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q9E. You indicated that you are planning to visit Hawai'i in the next 24 months. What type of area do you plan to stay in?
 Note: Question not asked in NOV 2014

REASONS FOR NOT VISITING HAWAII (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)



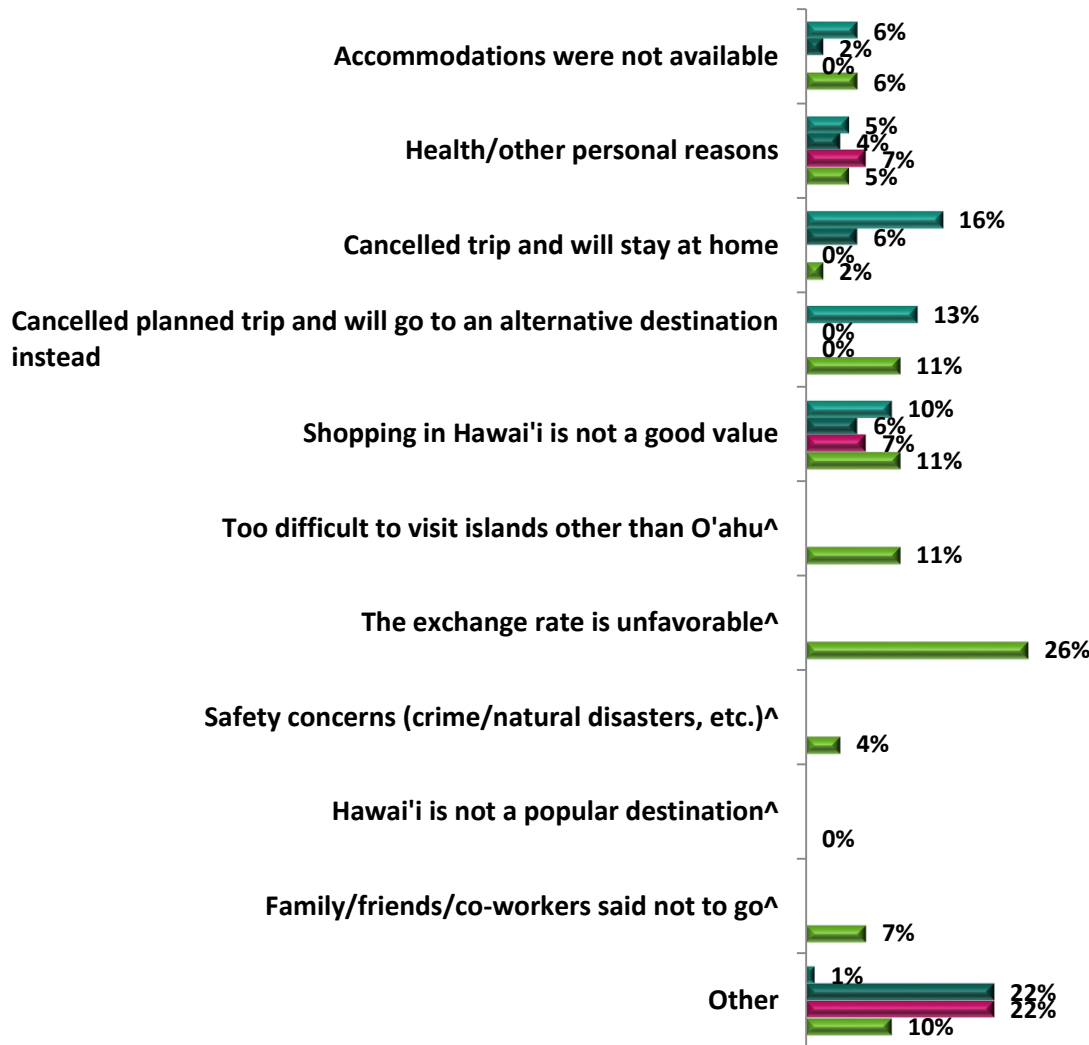
Q10: Earlier you indicated that you had considered Hawai'i for a leisure vacation, but are not intending to visit in the next 24 months.

Which of the following reasons explains why you considered, but are not intending to visit Hawai'i in the next 24 months?

Note: Sample sizes for this question are very small; use data with proper caution

REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



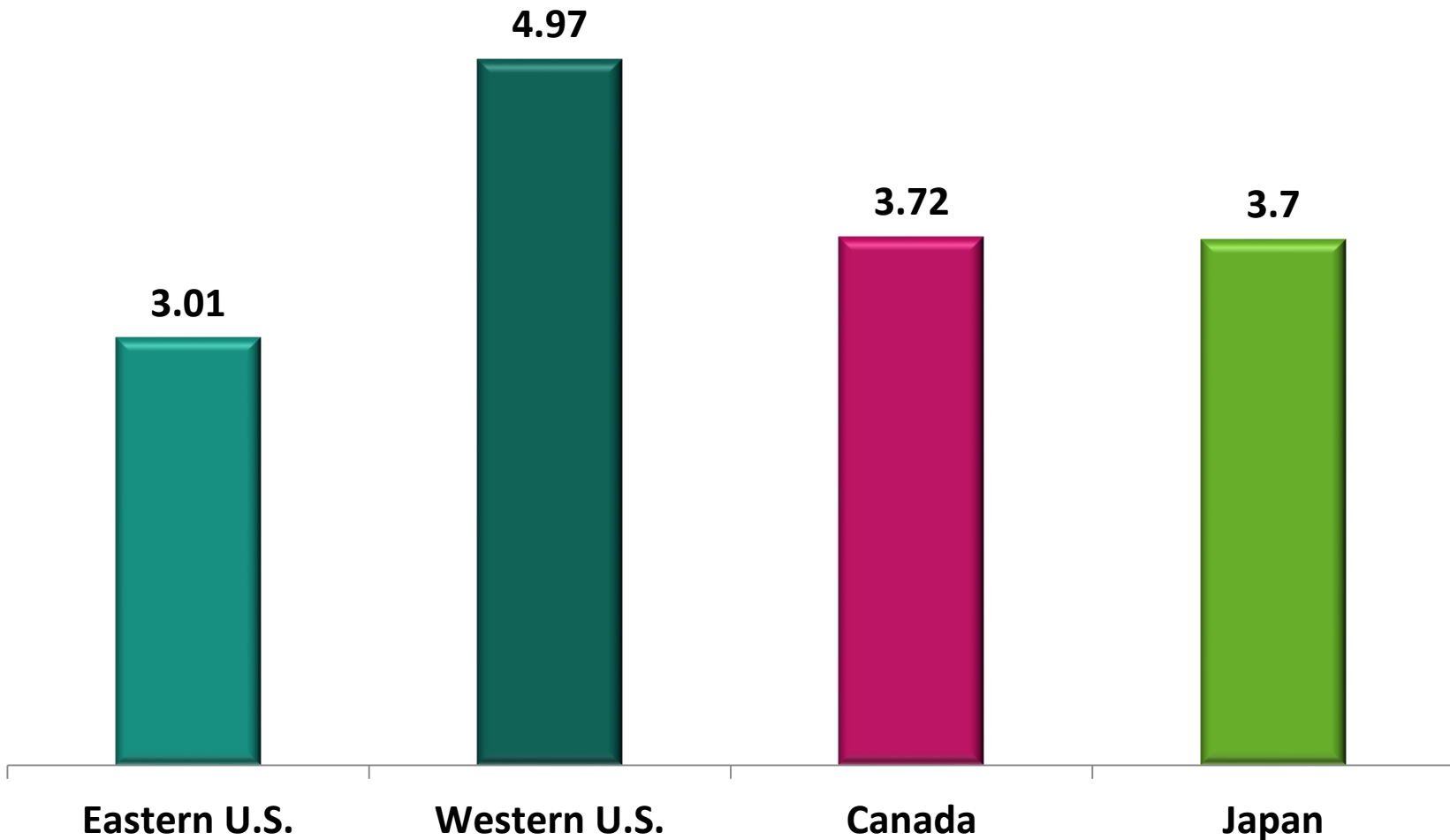
Q10: Earlier you indicated that you had considered Hawai'i for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawai'i in the next 24 months?

^Only asked of the Japanese Market

Note: Sample sizes for this question are very small; use data with proper caution

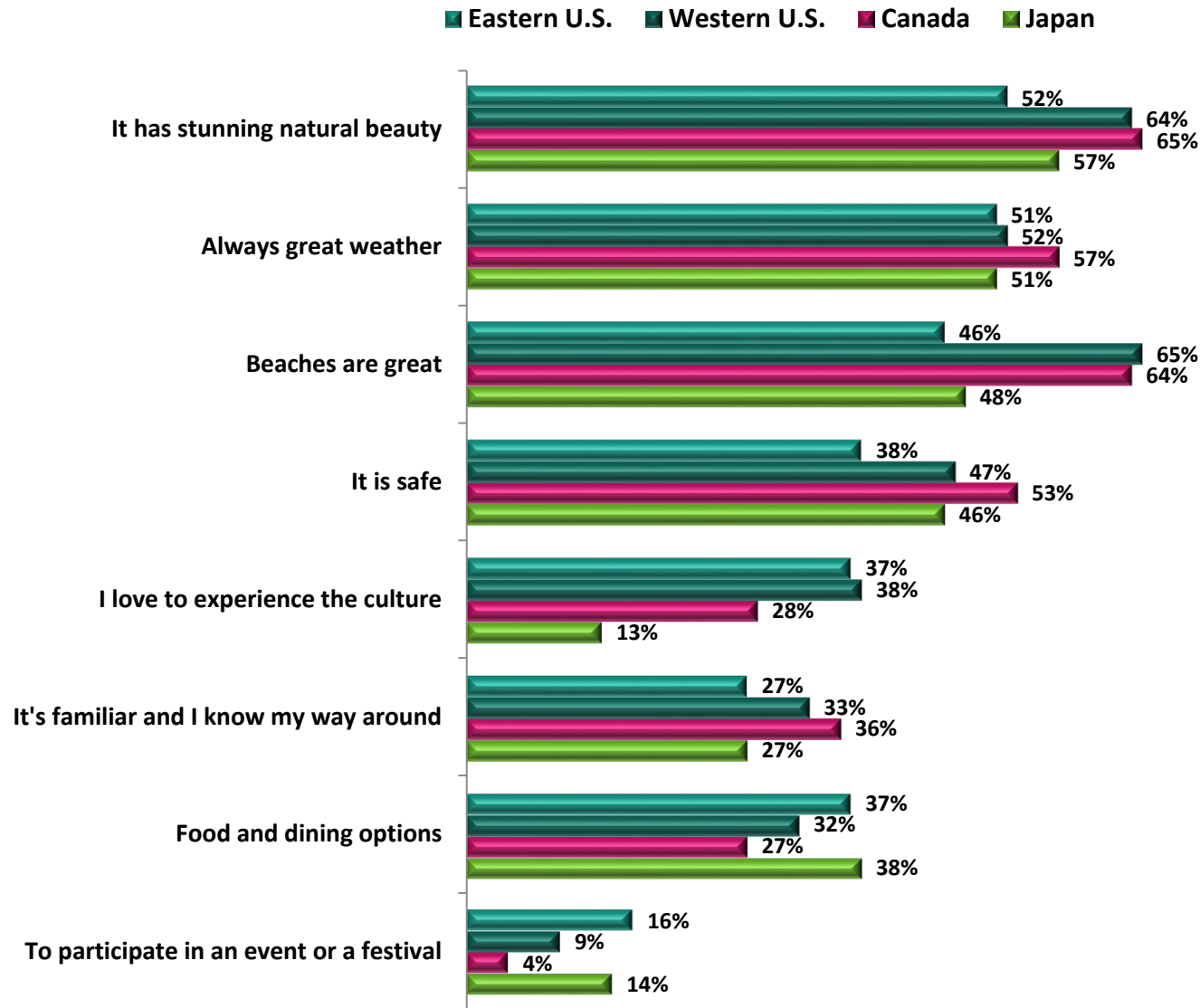
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AVERAGE LIFETIME VISITS TO HAWAI'I (AMONG THOSE VISITING 1+ TIMES)



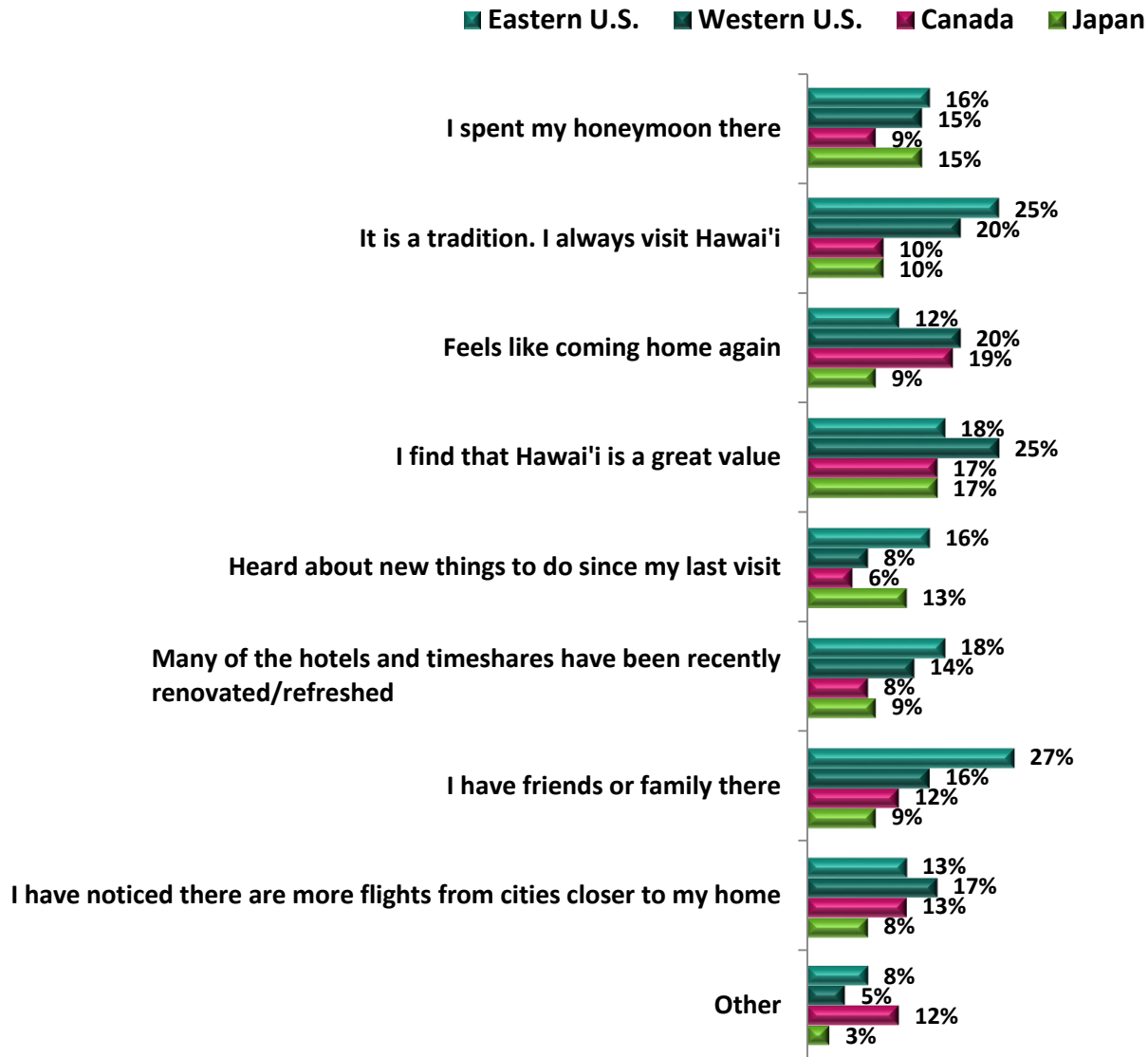
Q11: How many times have you visited Hawai'i in your lifetime?

REASONS FOR RETURNING TO HAWAII (AMONG THOSE VISITING HAWAII 2+ TIMES)



Q12: Which of the following reasons best explains why you keep returning to Hawaii?

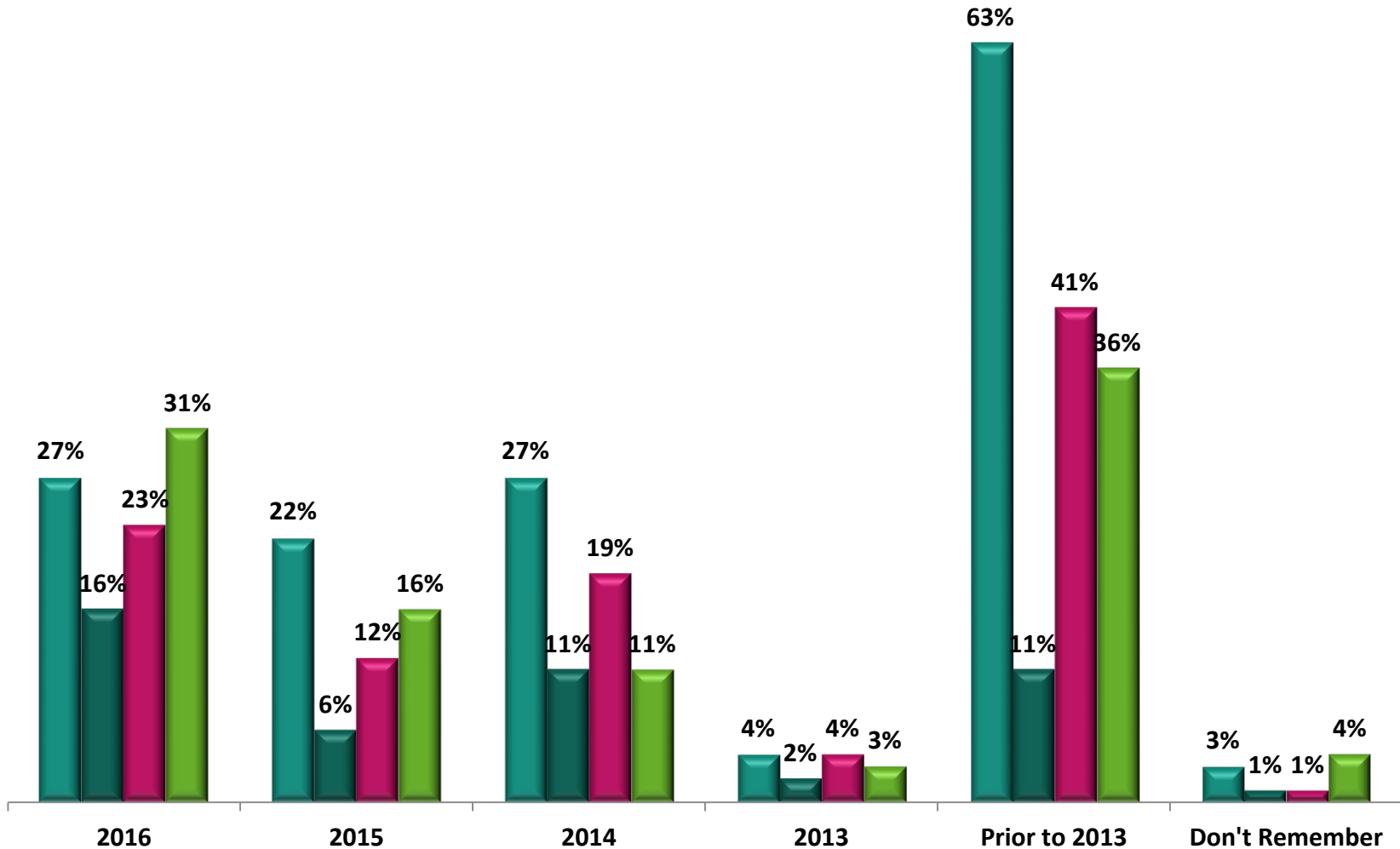
REASONS FOR RETURNING TO HAWAI'I (CONT.) (AMONG THOSE VISITING HAWAI'I 2+ TIMES)



Q12: Which of the following reasons best explains why you keep returning to Hawai'i?

YEAR LAST VISITED HAWAI'I

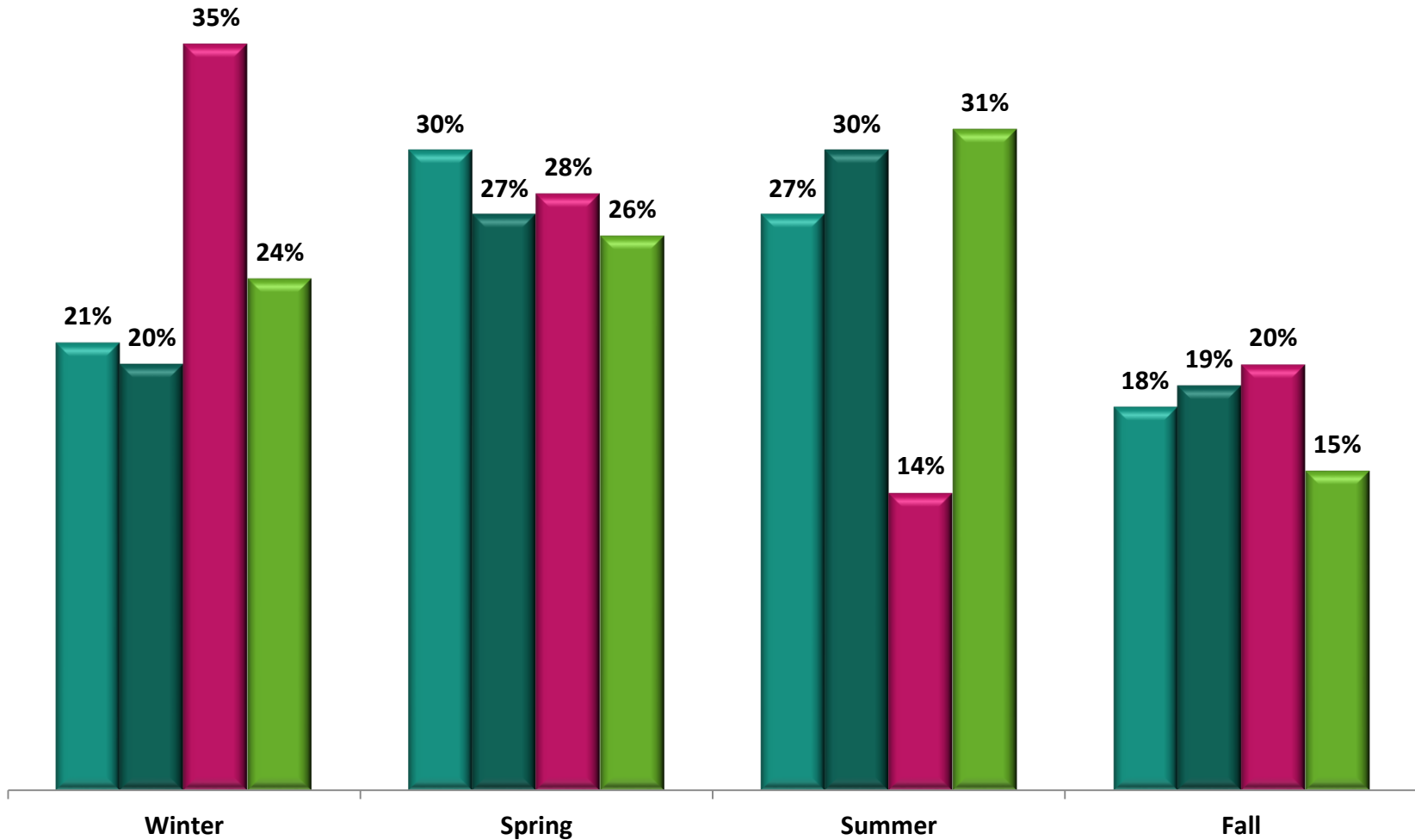
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q13a: What was the YEAR of your LAST VISIT to Hawai'i?

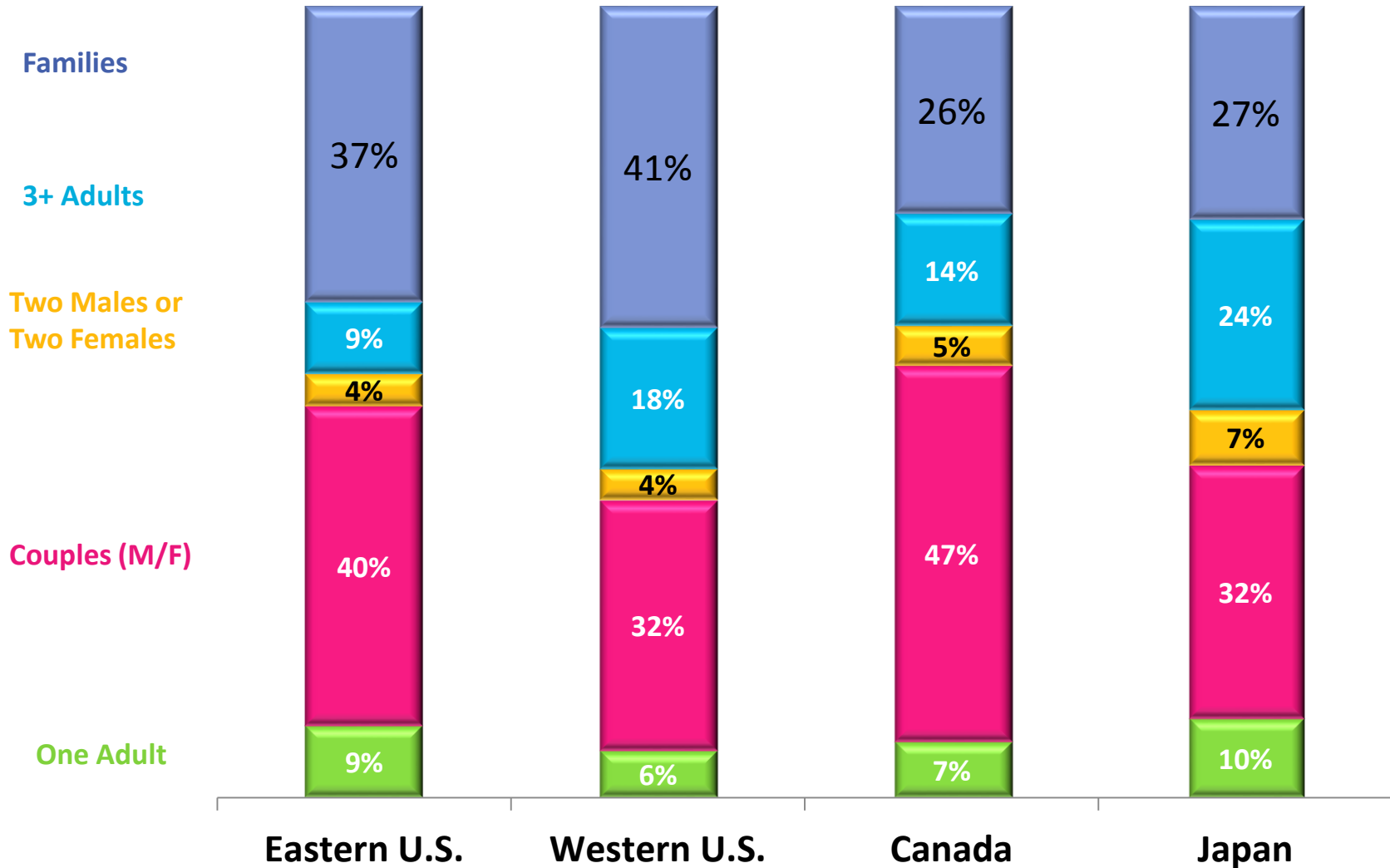
SEASON LAST VISITED HAWAII

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q13b: What was the MONTH of your LAST VISIT to Hawai'i?

TRAVEL PARTY COMPOSITION (SHARE)



Q16c: Including yourself, how many people were in your travel party on your most recent leisure trip to Hawai'i?