

2016
VISITOR SATISFACTION
AND ACTIVITY REPORT

HAWAII TOURISM

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ABOUT THIS REPORT

The 2016 Visitor Satisfaction and Activity Report (VSAT) presents the results of a survey conducted annually by the Hawai'i Tourism Authority (HTA) as part of its Tourism Research program. The survey measures the opinions of visitors from eight visitor groups: U.S. West, U.S. East, Japan, Canada, Europe, Oceania, China and Korea regarding their recent trip to Hawai'i.

Selected U.S. West, U.S. East, Japanese, Canadian, European and Oceania visitors were mailed a survey form or were contacted via email to complete the survey on-line. Beginning in January 2016, data for Chinese and Korean visitors were collected via intercept surveys at the Daniel K. Inouye International Airport using iPad tablets.

There were four objectives for the survey and the report. The first objective was to provide measurements of survey respondents' satisfaction with Hawai'i as a visitor destination. The report described visitors' evaluation of their vacation experience by investigating their reaction to events that occurred on the island on which they stayed the longest. Visitors rated their stay on four different evaluation categories – overall satisfaction, how well their experience matched their expectations, likelihood of recommending Hawai'i to others, and likelihood of returning to Hawai'i within the next five years.

The second objective was to investigate the activities in which visitors took part as they visited each of the islands on their itinerary. VSAT measured 50 activities which were categorized as sightseeing, shopping, history, culture and arts, entertainment and dining, recreation and transportation. Business activities, sports, wedding and family celebrations and visiting with friends and relatives were also measured. Those activities defined the vacation trips enjoyed by Hawai'i's visitors and provide a measure of the extent to which our products are being used.

The third objective was to offer some insights into the destination selection and trip planning process, as well as the timetable involved in planning and booking a trip. Survey data showed that visitors employed a variety of resources to plan, select and book a trip to Hawai'i.

The final objective was to provide demographic profiles of Hawai'i visitors. VSAT pulled together demographic and travel behavior patterns from this survey, the Domestic Inflight Survey and the International Intercept Survey¹. Together, these sources provide data on income and education, employment status, life-stage segments, First-time or Repeat visitors, the structure and type of the visitor party and reasons for visiting Hawai'i. This represents an enhanced level of detail not available from HTA's annual and monthly visitor reports.

This report and the companion Excel workbook of 2016 VSAT data tables are available on the HTA website: www.HawaiiTourismAuthority.org/research/reports/visitor-satisfaction. For further information, contact the HTA at (808) 973-2255.

This report was produced by HTA's Tourism Research staff: Ms. Jennifer Chun, Ms. Minh-Chau T. Chun and Mr. Lawrence Liu. The President and CEO of HTA is Mr. George Szigeti.

¹ Hawai'i Tourism Authority, Annual Research Report, 2015, pp. 182-185.

DEFINITIONS

Visitor: An out-of-state traveler who stayed in Hawai'i for at least one night and less than one year. In this report, findings attributed to "visitors" are based on data collected from eight visitor markets:

1. U.S. West – Pacific states (Alaska, California, Oregon, Washington) and Mountain states (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming)
2. U.S. East – Other states in the continental U.S.
3. Japan
4. Canada
5. Europe – United Kingdom, Germany, France, Italy, and Switzerland
6. Oceania – Australia and New Zealand
7. China
8. Korea

Visitor Lifestyle and Life stage: A classification used by HTA and other visitor industry members in Hawai'i to study specific market segments using the following classification:

- ❖ Wedding/Honeymoon: Visitors whose primary or secondary purpose of trip is to get married or be on their honeymoon
- ❖ Family: Visitors traveling with children under 18 years of age and are not included in the above life stage
- ❖ Young: Visitors between 18 and 34 years of age and who are not in the above life stages
- ❖ Middle Age: Visitors between 35 and 54 years of age and not in the above life stages
- ❖ Seniors: Visitors 55 years of age or over and not in the above life stages

Length of Stay: The average number of days visitors were present in Hawai'i including the day of arrival and the day of departure.

OVERVIEW OF VISITOR INDUSTRY

Hawai'i's tourism industry achieved new records in total visitor spending and visitor arrivals in 2016, marking the fifth consecutive year of record growth in both categories. Total spending by visitors to the Hawaiian Islands increased 5.3 percent to a new high of \$15.91 billion. A total of 8,934,277 visitors came by air or by cruise ships, up 2.9 percent from the previous record of 8,679,564 visitors in 2015. Total visitor days rose 2 percent from last year. The average spending per day by these visitors (\$197 per person) was also higher than in 2015 (\$191 per person).

Arrivals by air to O'ahu rose 2 percent to 5,447,229 visitors in 2016. There were 2,634,237 visitors who came by air to Maui, up 3.7 percent from 2015. Arrivals to Moloka'i declined 9 percent to 58,932. There was a 7.9 percent growth in arrivals to Lāna'i (to 63,024 visitors). Arrivals to the island of Hawai'i increased 2.3 percent to 1,549,943 visitors while arrivals to Kaua'i grew 1.2 percent to 1,187,269 visitors.

For a complete analysis of Hawai'i's visitor industry, please refer to the 2016 Annual Visitor Research Report posted on the HTA website at:

www.hawaiitourismauthority.org/research/reports/annual-visitor-research

and click on 2016 Annual Research Report (pdf).

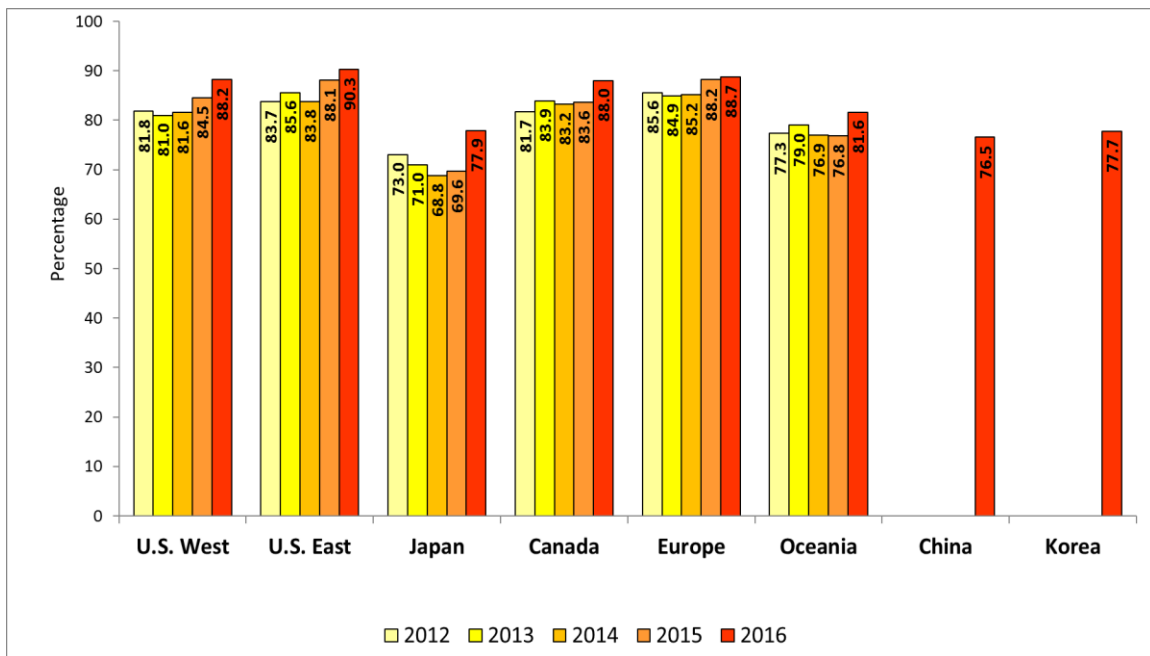
VISITOR SATISFACTION

Visitor satisfaction levels are an important indicator of visitor industry performance. They provide important feedback on how well services are delivered and how well those services fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination (See the companion Excel workbook of 2016 annual VSAT data tables posted on the HTA website).

OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I

Figure 1, shows the percent of respondents who rated their trip as "excellent" (7 or 8, on an 8-point scale). The majority of visitors in 2016 gave high marks for their overall experience in Hawai'i, and "excellent" ratings for several visitor markets were higher compared to 2015.

**Figure 1: Overall Rating of Trip
(Percentage of Visitors Who Rated this Most Recent Trip "Excellent" by MMA)²**



- In 2016, 77.9 percent of Japanese respondents gave excellent ratings to their most recent trip to Hawai'i, up 8.2 points from the previous year.
- Ratings by Oceania (+4.8 points), Canadian (+4.4 points), U.S. West (+3.7 points) and U.S. East (+2.2 points) also improved compared to 2015.
- Ratings by European visitors were similar compared to last year.
- Three out of four Chinese and Korean respondents in 2016 gave excellent ratings to their trip to Hawai'i.

² Percentage of respondents who rated their most recent trip a 7 or 8 where 1 = poor and 8 = excellent.

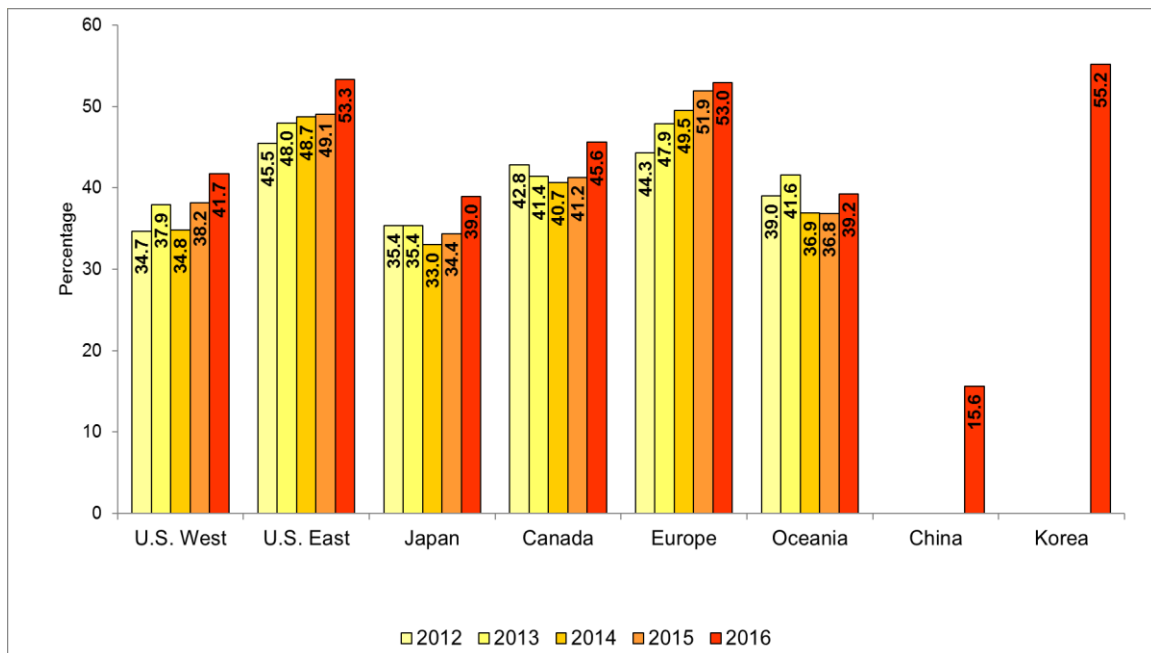
MEETING VISITOR EXPECTATIONS

Visitors' evaluation of their trip is influenced not only by the nature of the service they receive, but also by their needs, interests and expectations. Visitors were asked if their Hawai'i trip "exceeded" "met" or "did not meet" expectations.

In 2016, ratings of exceeded expectations by visitors from most markets have increased compared to last year.

Very few respondents from U.S. West (3%), U.S. East (3%), Japan (2%), Canada (2%), Europe (3%), Oceania (4%), Korea (3%), and 7 percent of Chinese respondents said that Hawai'i did not meet their expectations.

**Figure 2: Trip Exceeded Expectations
(Percentage of Visitors Who Said this Trip "Exceeded" Expectations by MMA)**



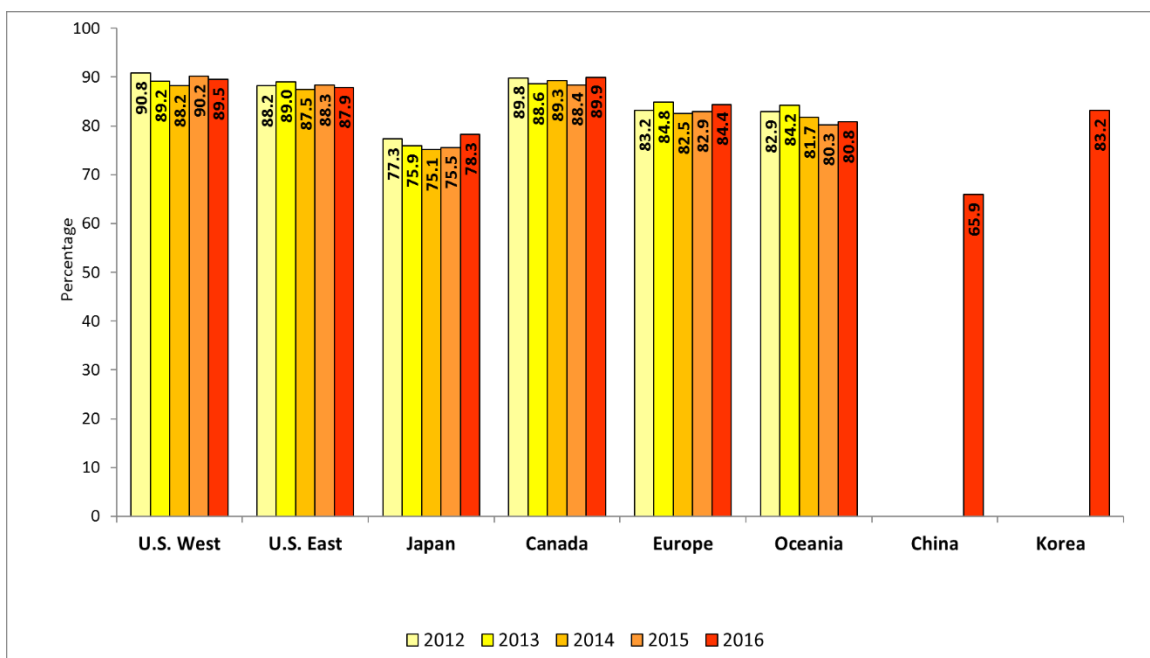
- A higher percentage of Japanese (+4.6 points), Canadian (+4.4 points), U.S. East (+4.2 points) and U.S. West (+3.6 points) respondents felt their trip exceeded their expectations compared to 2015.
- Ratings by European visitors have shown slight improvements over the past four years.
- Ratings by Oceania visitors (+2.2 points) were up slightly compared to 2015.
- Over half of Korean respondents in 2016 said Hawai'i exceeded their expectations.
- Chinese visitors were more critical about Hawai'i than other visitor groups. Only 15.6 percent of the respondents felt that Hawai'i exceeded their expectations while 77.7 percent said the trip met their expectations.

LIKELIHOOD TO RECOMMEND HAWAI‘I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. Visitors were asked if they were “very likely”, “somewhat likely”, “not too likely” or “not at all likely” recommend Hawai‘i as a vacation place to friends and relatives.

In 2016, only a small percentage of U.S. West (1%), U.S. East (2%), Japanese (2%), Canadian (1%), European (2%), Oceania (3%) and Korean (2%) visitors said that they would not too likely or not at all likely recommend Hawai‘i. Chinese respondents were harder to please, as 9 percent said they would not too likely or not at all likely recommend Hawai‘i. The majority of visitors continued to respond that they would very likely recommend Hawai‘i to others.

**Figure 3: Very Likely to Recommend Hawai‘i to Friends and Relatives
(Percentage of Visitors “Very Likely” to Recommend Hawai‘i for Vacation by MMA)**

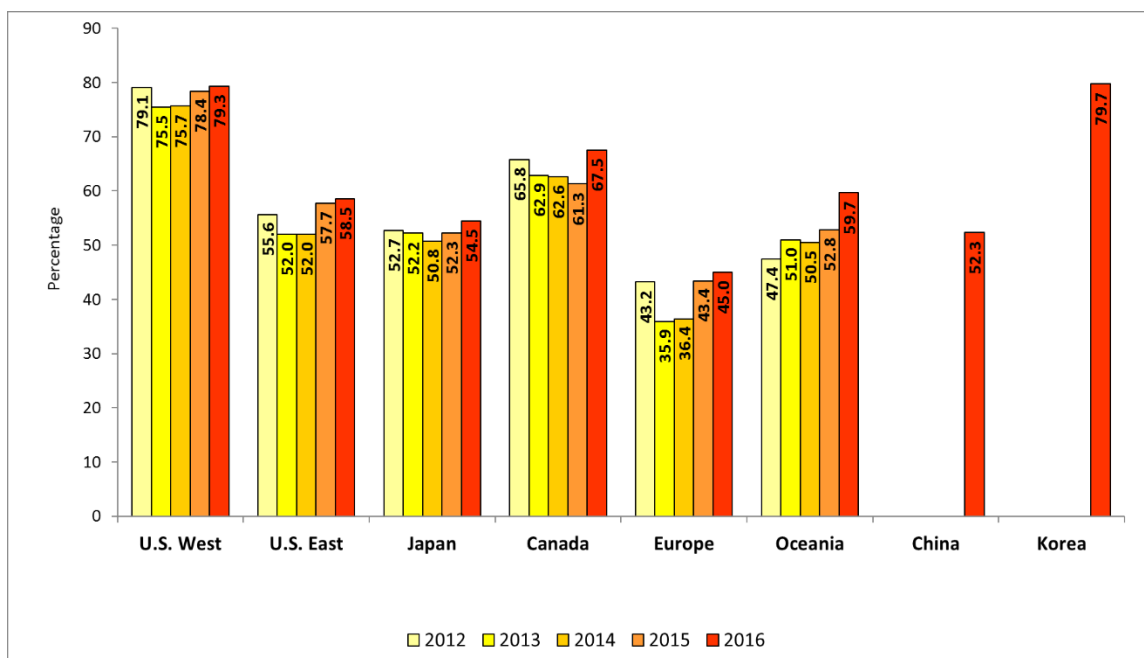


- Nine out of ten U.S. West, U.S. East and Canadian respondents in 2016 would very likely recommend Hawai‘i to friends and relatives. These ratings have been relatively consistent over the last five years.
- Slightly more than 80 percent of respondents from Oceania and Europe would very likely recommend Hawai‘i. Their ratings in 2016 were similar to a year ago.
- Japanese visitors’ ratings have been hovering near 80 percent. Ratings in 2016 improved 2.8 points from 2015.
- In 2016, 83.2 percent of Korean respondents and 65.9 percent of Chinese respondents would very likely recommend Hawai‘i to their friends and relatives.

LIKELIHOOD TO REVISIT HAWAI'I

Likelihood to revisit Hawai'i is an indicator of future demand and changes in desires. Each visitor's decision to return to Hawai'i is influenced by a variety of factors. Among these factors are positive experiences during their most recent trips, a desire for new experiences, amount of time available, financial considerations, airline access and the distance from Hawai'i.

**Figure 4: Very Likely to Revisit Hawai'i
(Percentage of Visitors "Very Likely" to Revisit in the Next Five Years by MMA)**

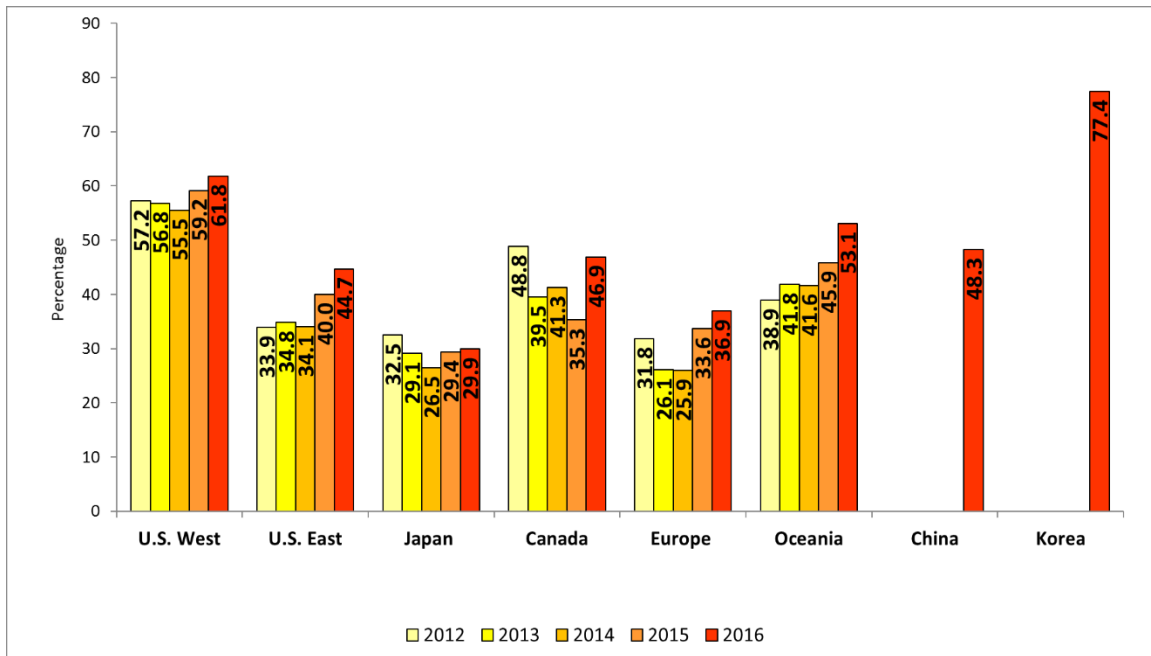


- Two out of three Canadian respondents in 2016 and nearly 60 percent of Oceania visitors said that they would very likely return to Hawai'i in the next five years. This was an increase of 6.2 points and 6.8 points respectively, from 2015.
- Ratings from Japanese respondents improved 2.2 points to 54.5 percent who said that they would very likely revisit the islands.
- U.S. West respondents continued to show the highest overall willingness to revisit Hawai'i (about 80%). Ratings for 2016 were similar to last year (+0.9 points).
- Over half of U.S. East (58.5%) respondents in 2016 said they would very likely come back. These percentages were consistent with 2015.
- With the long distance and no direct flights to Hawai'i, European visitors continued to show the lowest percentage of likelihood to return (45%).
- Eight out of ten Korean respondents and 52.3 percent of Chinese respondents in 2016 said that they would very likely revisit Hawai'i in the next five years.

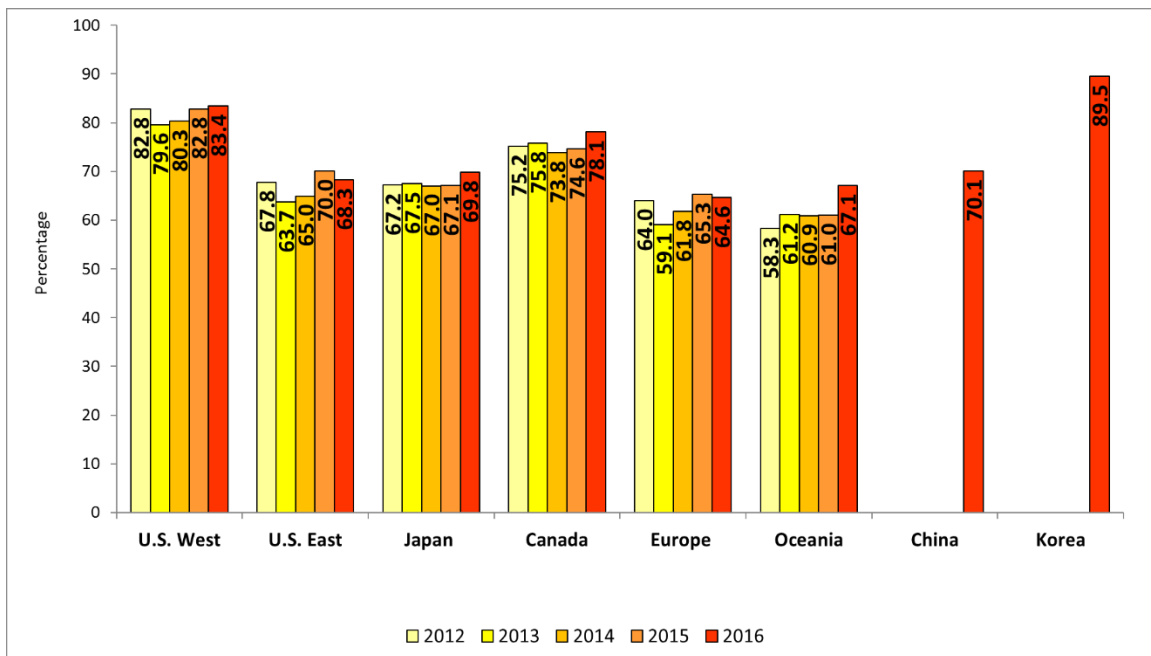
FIRST-TIME /REPEAT VISITORS

Likelihood to revisit is also highly correlated with visitor status (first-time or repeat). Percentages of first-time and repeat visitors varied across visitor markets. Figure 5 presents VSAT measures for likelihood of returning to Hawai'i by first-time visitors and Figure 6 presents the same measures by repeat visitors.

**Figure 5: First-time Very Likely to Revisit Hawai'i
(Percentage of First-Time Visitors "Very Likely" to Revisit in the Next Five Years by MMA)**



**Figure 6: Repeat Visitors Very Likely to Revisit Hawai'i
(Percentage of Repeat Visitors "Very Likely" to Revisit in the Next Five Years by MMA)**



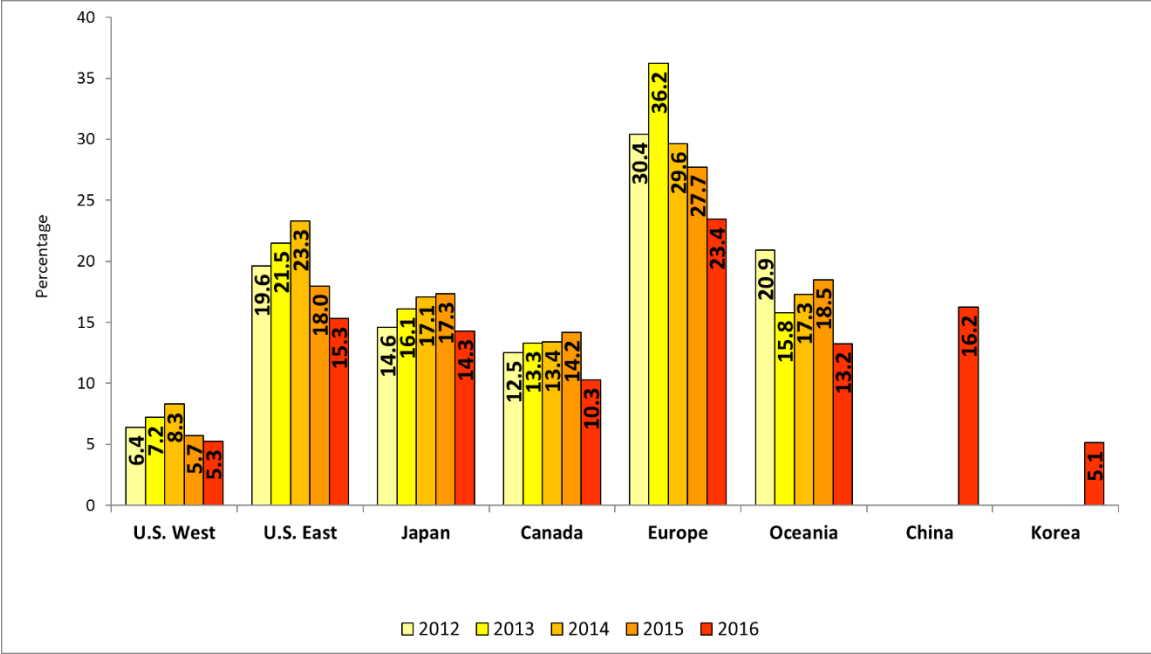
- Among U.S. West respondents in 2016, 61.8 percent of first-time visitors said that they would very likely return to Hawai'i, up 2.6 points from the previous year. Ratings by repeat visitors (83.4%) were virtually unchanged from 2015.
- For U.S. East respondents, 44.7 percent of first-time visitors said they would very likely return, compared to 40 percent in 2015. However, a slightly lower percentage of repeat Visitors (-1.7 points to 68.3%) said that they would very likely revisit.

- Among Japanese respondents, there was an increase in the percentage of repeat visitors who said they would return (+2.7 points to 69.8%), while ratings from first-time visitors (29.9%) were similar to 2015.
- For Canadian respondents, 46.9 percent of first-time visitors said they would very likely revisit, which was an 11.6 points improvement from 2015. A larger percentage of repeat Visitors (+3.5 points to 78.1%) also said that they would very likely return compared to the prior year.
- For European Respondents, the likelihood of returning by first-time visitors rose 3.3 points to 36.9 percent, while ratings by repeat visitors (64.6%) were similar to 2015.
- For Respondents from Oceania, a higher percentage of first-time visitors (+7.2 points to 53.1%) and repeat visitors (+6.1 points to 67.1%) said that they would likely return.
- For Chinese Respondents, 48.3 percent of first-time visitors said they would likely revisit Hawai'i while 70.1 percent of repeat visitors same that they would very likely come back.
- Among Korean Respondents, the majority of first-time visitors (77.4%) and repeat visitors (89.5%) said they would likely revisit the islands in the next five years.

NOT LIKELY TO REVISIT HAWAI'I

The percentage of respondents who said that they would “not too likely” or “not at all likely” return to Hawai'i was the lowest among Korean and U.S. West respondents and highest among European respondents.

Figure 7: Not Likely to Revisit Hawai'i
 (Percentage of Visitors who are “Not too likely” or “Not at all likely” to Visit Hawai'i in the Next Five Years” by MMA)

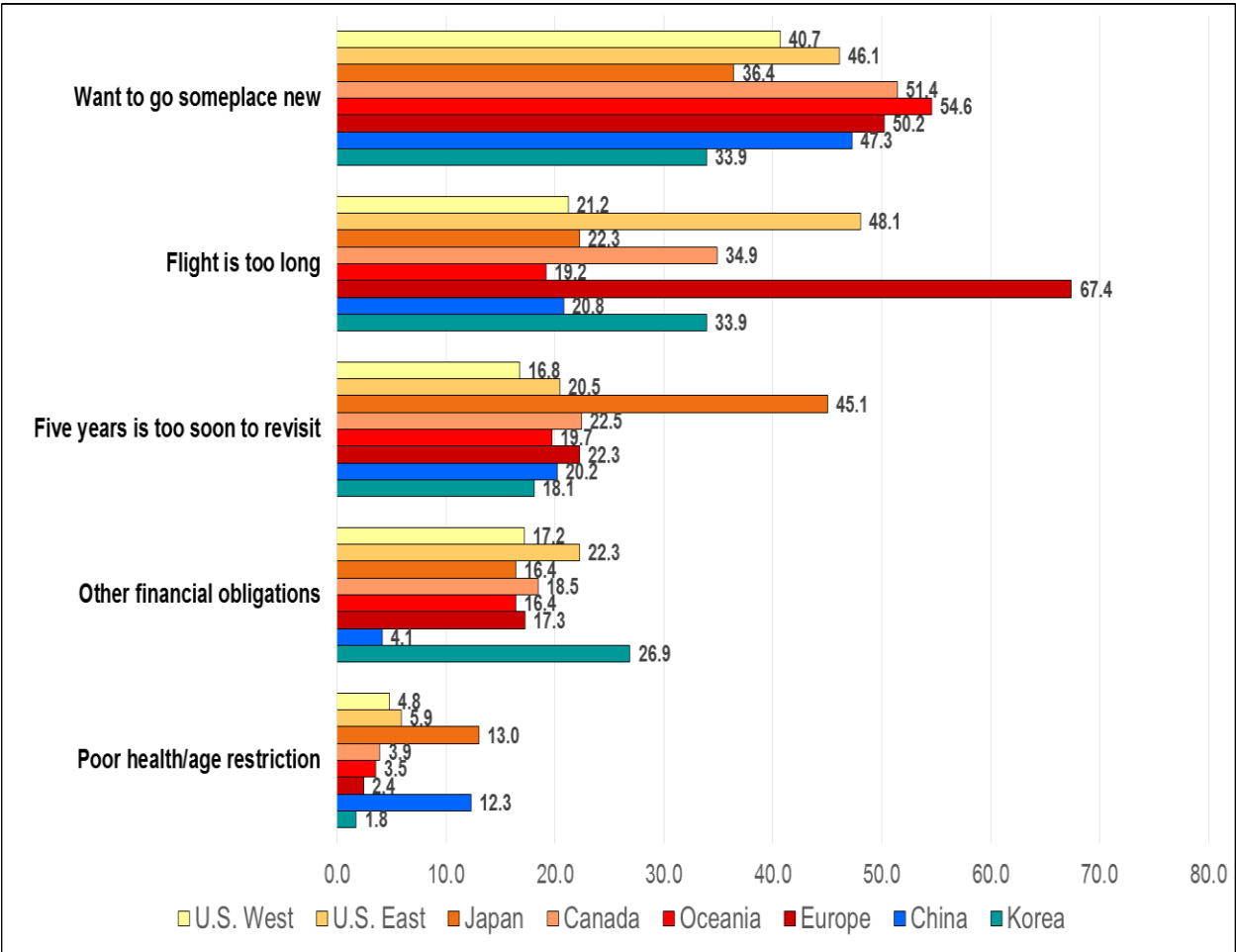


- For European respondents in 2016, the percentage of not likely to return improved to 23.4 percent, the lowest in the last five years.
- Ratings by Oceania (-5.3 points) and Canadian (-3.9 points), Japanese (-3 points) and U.S. East (-2.7 points) respondents were also better compared to 2015.
- Ratings from U.S. West respondents were similar to a year ago.
- Among Chinese respondents in 2016, 16.2 percent said they would not likely revisit Hawai'i.
- For Korean respondents, only 5.1 percent said that they would not return to the islands.

Reasons for Not Revisiting Hawai'i

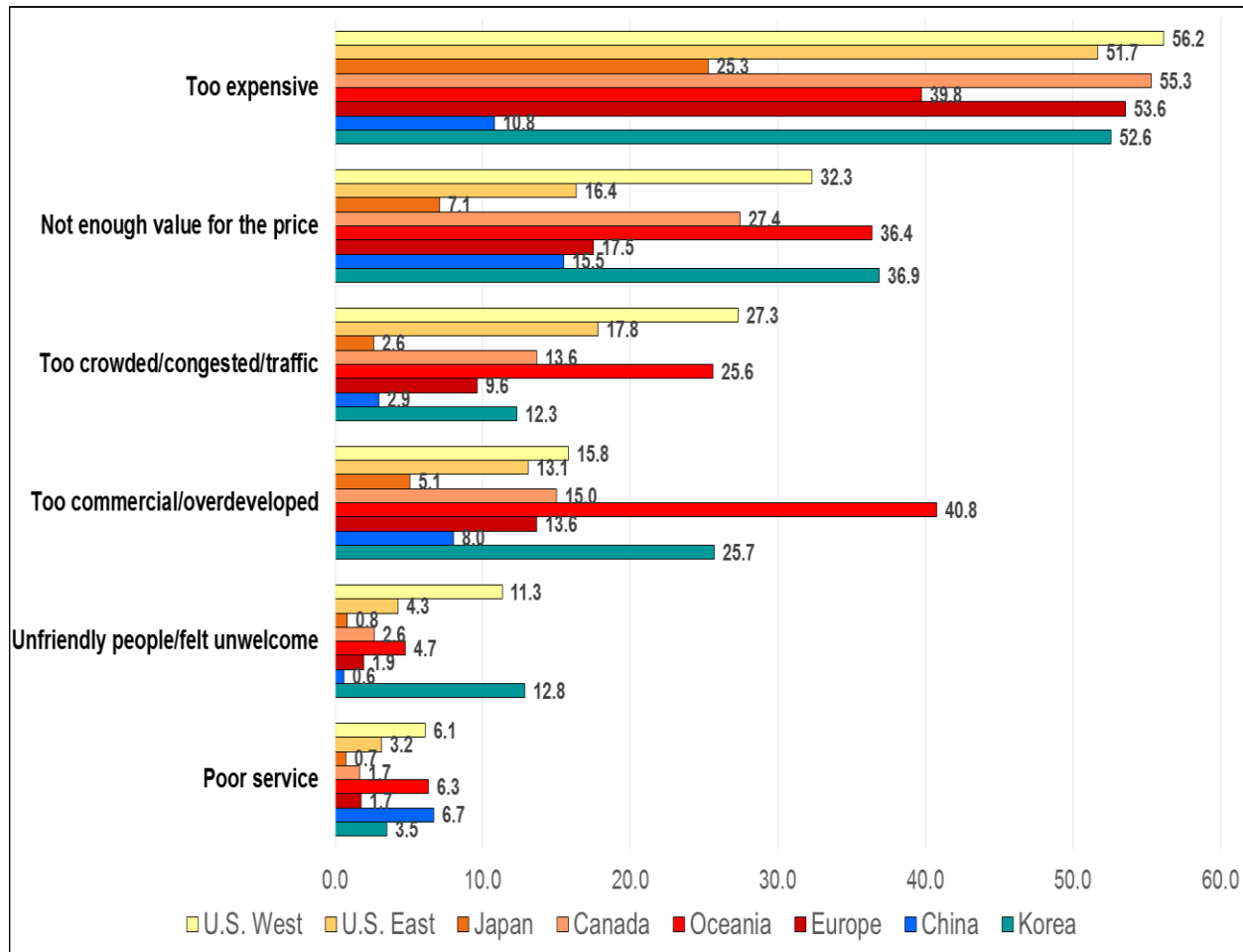
Respondents to the 2016 survey who said that they would “not too likely” or “not at all likely” return were asked to give the reason(s). A list of 11 reasons were offered in the survey and respondents could check all that applied.

Figure 8: Reasons for Not Returning by MMA – “Barriers”
 (Percentage of 2016 Visitors Not Likely to Revisit Hawai'i in the Next Five Years)



The five items in Figure 8 are “barriers” to returning. They are conditions of the marketplace or characteristics of the traveler. The six items in Figure 9 are “performance” issues. They are comments that indicate dissatisfaction with Hawai'i’s visitor industry product. “Not enough value for the price” is similar to “too expensive,” but is a complaint about the quality of the product rather than its price tag. For all visitor markets, very few respondents said they would not return because of unfriendly people or poor service.

**Figure 9: Reasons for Not Returning by MMA – “Performance Issues”
(Percentage of 2016 Visitors Not Likely to Revisit Hawai‘i in the Next Five Years)**



U.S. West: The desire to go someplace new (40.7%) continued to be the primary barrier to revisiting Hawai‘i among U.S. West respondents in 2016, similar to last year (39.9%). More respondents mentioned the long flight (+7.5 points to 21.2%), but fewer mentioned other financial obligations (-6.8 points to 17.2%) as barriers to returning.

The high cost was an issue for a larger percentage of U.S. West respondents (56.2%) compared to those who came in 2015 (41.2%). More visitors also said that there is not enough value for the price (+7.6 points to 32.3%), Hawai‘i is too crowded/congested (+4.3 points to 27.3%), and that they encountered unfriendly people/felt unwelcome (+5.5 points to 11.3%).

U.S. East: Similar to 2015, the long flights (48.1%) and the desire to go someplace new (46.1%) were the top two barriers cited by U.S. East visitors.

The high cost (+3.4 points 51.7%) continued to be the primary performance issue affecting U.S. East visitors’ likelihood to return. Other reasons provided were Hawai‘i is too crowded/congested (+5.9 points to 17.8%) and there is not enough value for the price (+3.6 points to 16.4%).

Japan: Japanese respondents in 2016 continued to cite more barriers than performance-related issues as reasons for not returning. Similar to 2015, about half of the visitors said that five years is too soon to revisit (45.1%). The desire to go someplace new (-1.2 points to 36.4%) and the flight is too long (+2.9 points to 22.3%) were other barriers cited.

The high cost (-2.2 points to 25.3 points) remained the primary performance issues for Japanese respondents, though not as prevalent an issue as it was for the other markets. Only 7.1 percent (+0.3 points) said there was not enough value for the price they paid.

Canada: The desire to visit someplace new (-6.4 points to 51.4%) continued to be the main barrier to revisiting Hawai'i among Canadian visitors. Other reasons provided were the long flight (+3.9 points to 34.9%) and five years is too soon to revisit (-3.1 points to 22.5%).

The primary performance-related issue was the high cost (55.3%) which rose 8.6 points from 2015. More respondents also felt that there is not enough value for the price (+8.5 points to 27.4%) compared to last year.

Europe: The long flight (+4.9 points to 67.4%) continued to be the primary barrier to European visitors' return to Hawai'i. Other reasons provided were the desire to go someplace new (+0.7 points to 50.2%) and five years is too soon to revisit (-3.8% to 22.3%).

The high cost has become an increasing concern for European visitors. Over half of the respondents in 2016 said they will not revisit because Hawai'i is too expensive (53.6%), up 16.9 points from last year. A larger percentage of Europeans respondents also said that there is not enough value for the price (+7.7 points to 17.5%).

Oceania: Among this group of respondents, the most common barrier for revisiting continued to be the desire to go someplace new (-2.9 points to 54.6%). More visitors mentioned the long flight (+7.4 points to 19.2%) or indicated that five years is too soon to revisit (+4.3 points to 19.7%).

In terms of performance-related issues, a larger percentage of Oceania respondents said that they won't be returning because Hawai'i is too expensive (+14.8 points to 39.8%) and there is not enough value for the price (+14.4 points to 36.4%) compared to 2015.

China: Among Chinese respondents in 2016, the desire to go someplace new (47.3%) was the main barrier to revisiting Hawai'i. The flight is too long (20.8%) and five years is too soon to revisit (20.2%) were other reasons provided. Not enough value for the price they paid (15.5%) and the high cost (10.8%) were less concerning for Chinese respondents compared to respondents from other visitor groups.

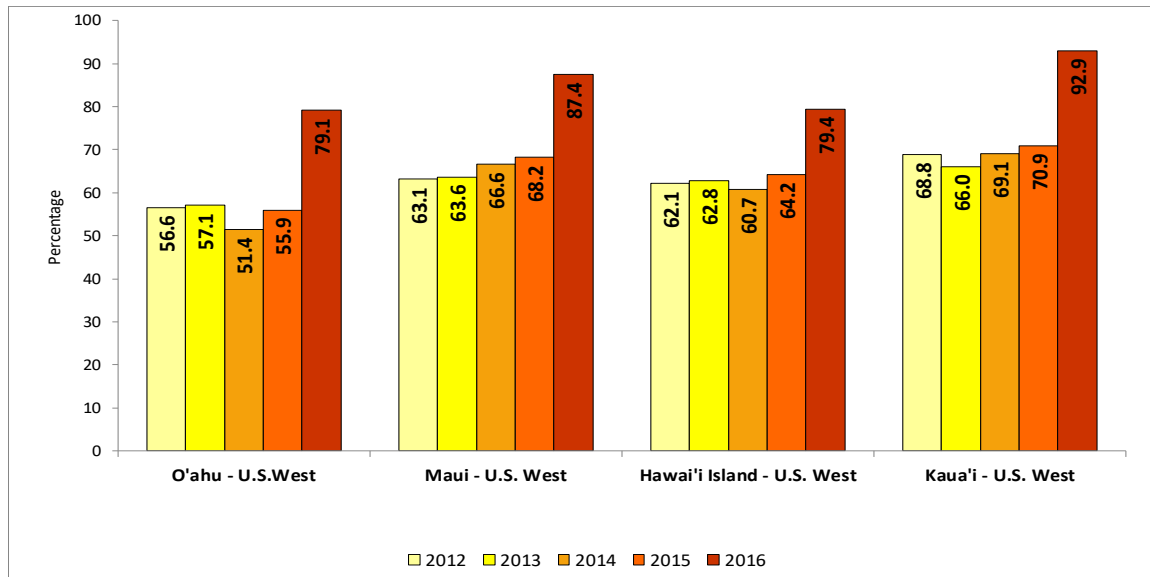
Korea: Among Korean respondents in 2016, the high cost (52.6%) was the primary reason for not returning to Hawai'i. A third of the visitors indicated that there was not enough value for the price (36.9%), the flight was too long (33.9%) or they want to go someplace new (33.9%).

INDIVIDUAL ISLAND EXPERIENCE

Each island has unique characteristics, activities, and products that provide different visitor experiences. The VSAT survey asks Hawai'i visitors to rate their experience on each island they visited. Overall, the majority of visitors reported that their individual island experiences were "excellent."

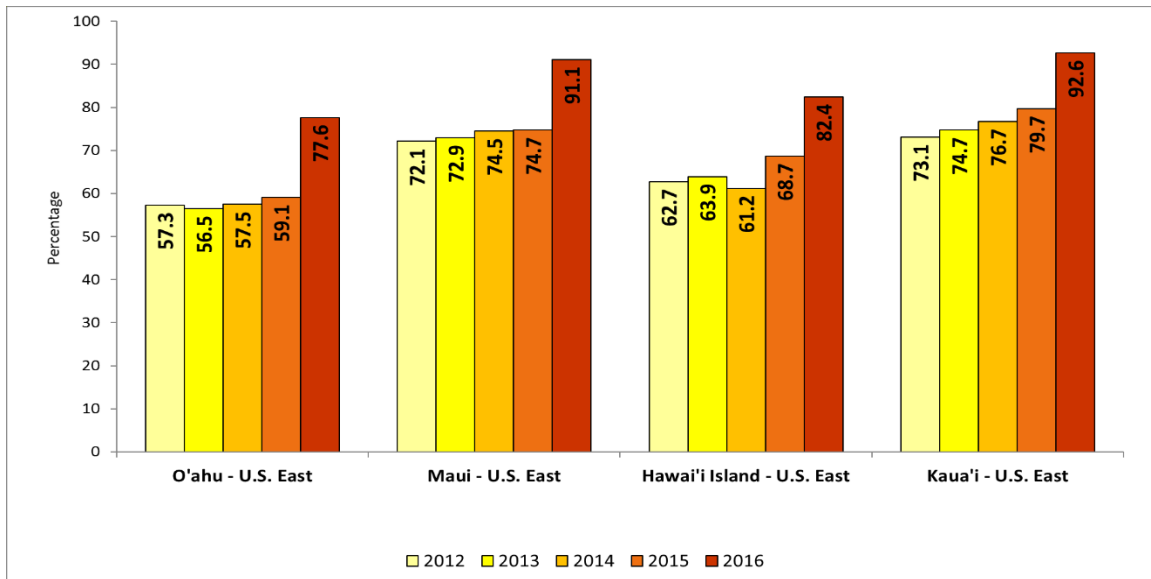
Beginning with the 2016 VSAT survey, response options for satisfaction by island were changed from a 4-point scale to an 8-point scale. While additional variances in the measure will enable more detailed analysis going forward, 2016 data will not be comparable to previous years. 2016 percentages shown in Figures 10 to 17 were the sum of responses 7 and 8, divided by the total responses.

**Figure 10: Island Experience Rated as "Excellent" – U.S. West
(Percentage of Visitors by Island)**



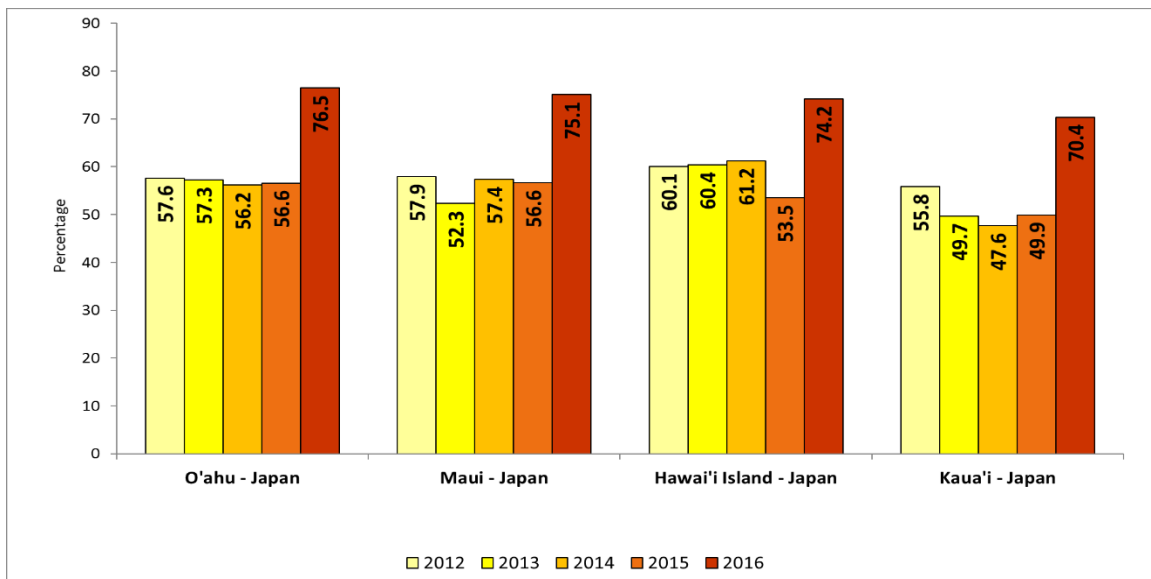
- Most U.S. West visitors in 2016 gave excellent ratings to the island they visited. Kaua'i and Maui continued to score higher than O'ahu and the island of Hawai'i.

**Figure 11: Island Experience Rated as “Excellent” – U.S. East
(Percentage of Visitors by Island)**



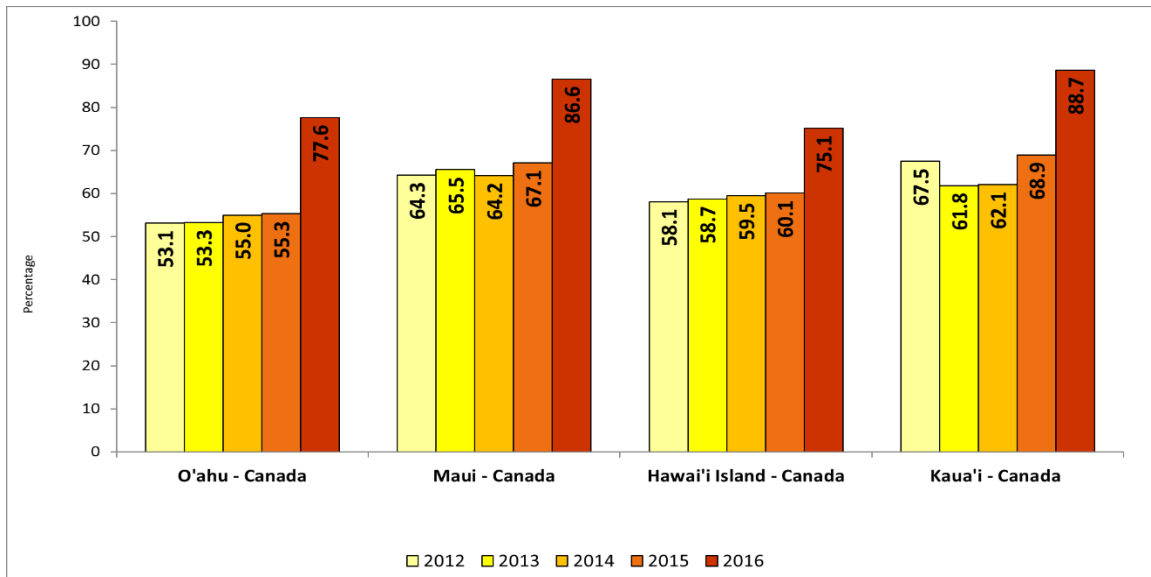
- Over 90 percent of U.S. East respondents who visited Kaua'i and Maui in 2016 rated their experience as excellent. The island of Hawai'i received excellent ratings from 82.4 percent of the respondents, while 77.6 percent gave excellent marks to O'ahu.

**Figure 12: Island Experience Rated as “Excellent” – Japan
(Percentage of Visitors by Island)**



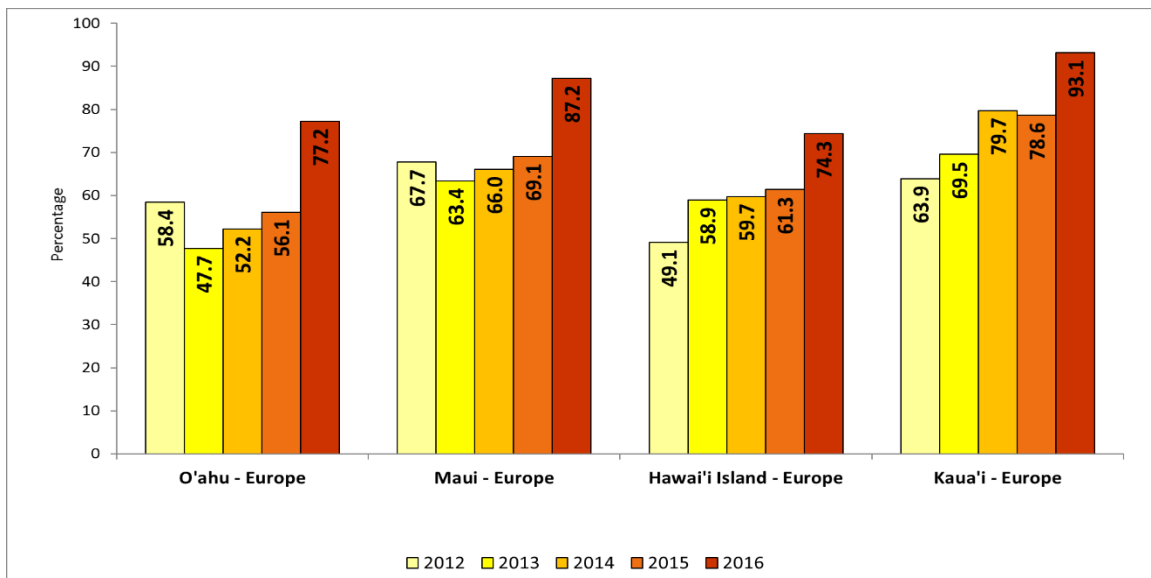
- The majority of Japanese respondents who visited O'ahu, Maui, Kaua'i and the island of Hawai'i in 2016 rated their experience as excellent.

**Figure 13: Island Experience Rated as “Excellent” – Canada
(Percentage of Visitors by Island)**



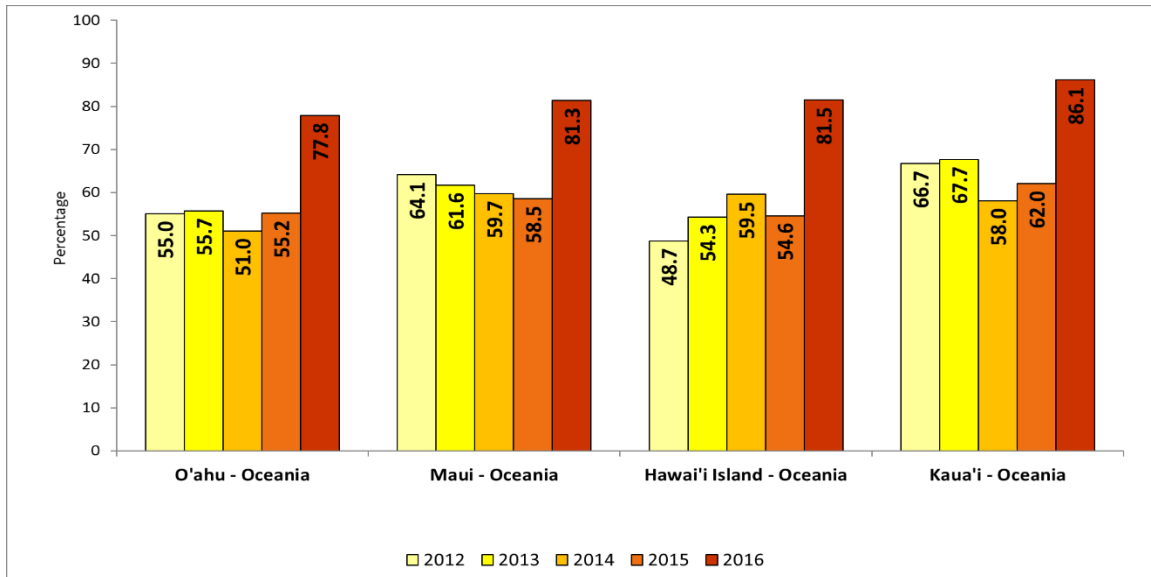
- A higher percentage of Canadian respondents in 2016 continued to give excellent ratings to Kaua'i and Maui compared to O'ahu and the island of Hawai'i.

**Figure 14: Island Experience Rated as “Excellent” – Europe
(Percentage of Visitors by Island)**



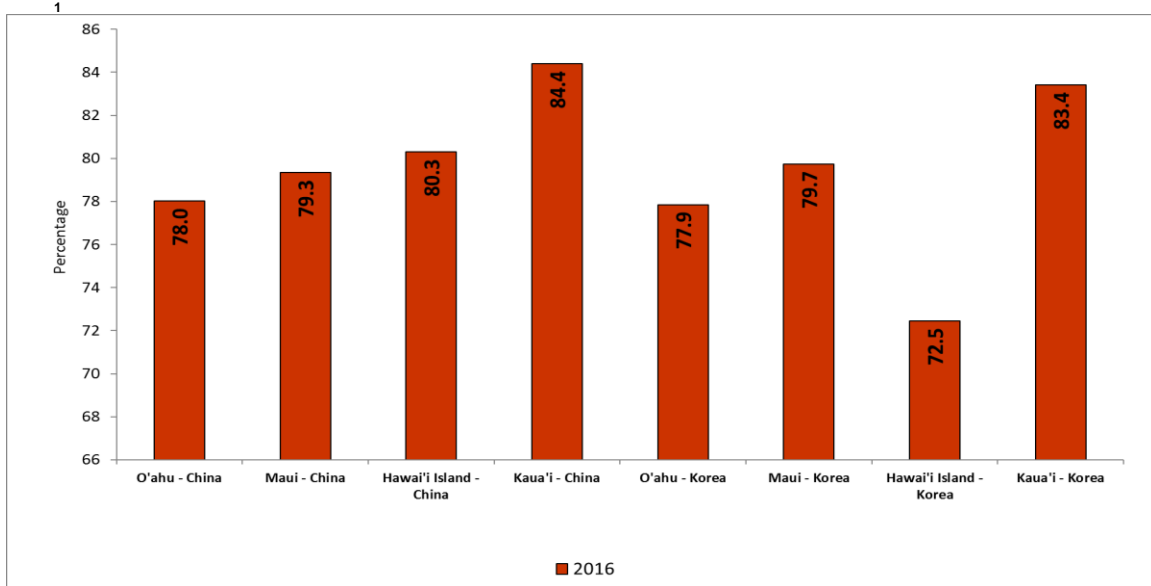
- European respondents in 2016 continued to rate Kaua'i the highest among the islands. Maui received the next largest percent of excellent ratings, followed by O'ahu and the island of Hawai'i.

**Figure 15: Island Experience Rated as “Excellent” – Oceania
(Percentage of Visitors by Island)**



- Most Oceania respondents who went to O’ahu, Maui, Kaua’i and the island of Hawai’i in 2016 rated their experience as excellent.

**Figure 16: Island Experience Rated as “Excellent” – China
(Percentage of Visitors by Island)**



Samples of Chinese and Korean respondents on Kaua’i were limited.

- In 2016, close to 80 percent of Chinese respondents gave excellent ratings to their visit to O’ahu, Maui and the island of Hawai’i.
- Among Korean respondents, eight out of ten rated Maui and O’ahu excellent, while the island of Hawai’i received excellent ratings from 72.5 percent of the visitors.

ACTIVITY PARTICIPATION

The VSAT survey measures visitor participation for 50 different activities in seven different geographic areas of the state (O'ahu, Kaua'i, Maui, Lāna'i, Moloka'i, Kona and Hilo). Percentages represent visitors who participated in at least one of the activities in the group at least once during their 2016 visit to Hawai'i (See the companion Excel workbook of 2016 VSAT data tables posted on the HTA website for activities statistics).

U.S. West

Entertainment and dining: Nearly all U.S. West visitors in 2016 engaged in entertainment and dining activities statewide (99.5%).

- In dining options, the majority of the respondents ate at family restaurants while on O'ahu (66.1%), Maui (71.8%), Kaua'i (72%) and Kona (63.5%).
- Six out of ten respondents prepared their own meals. U.S. West visitors had the highest tendency to prepare their own meals (64.7%) while on Kaua'i.
- A higher percentage of U.S. West respondents indulged in fine dining while on Maui (56.6%) and Kaua'i (55.1%) compared to O'ahu (44.6%). A similar percentage of visitors on Maui (29.7%) and Kaua'i (29.2%) went on lunch/sunset/dinner/evening cruises.
- More U.S. West visitors on O'ahu went to night club/dancing/bar/karaoke (12.3%) and indulged in ethnic dining (36.6%).

Shopping: Most U.S. West respondents went shopping (98.4%) statewide.

- The majority of them shopped in local shops/artisans (70%), particularly on Kaua'i (80.4%) and Maui (73.3%).
- Seven out of ten U.S. West respondents shopped in supermarkets (70.2%), especially on Kaua'i (72.5%) and Maui (69.9%).
- Over half shopped in department stores (53.5%), particularly on O'ahu.
- Some also shopped at hotel stores (42.2%), farmers' markets (39%), designer boutiques (30.3%), swap meet (26%) and discount outlets (24.7%) statewide.

Recreation: U.S. West respondents in 2016 actively participated in recreation (97.1%).

- Beach/sunbathing (88.1%) was the most popular activity, followed by swimming in the ocean/snorkeling (75.4%), visiting state parks/botanical gardens (53.5%) and running/jogging/fitness walking (41%).
- In 2016, more U.S. West visitors participated in recreation activities while on Kaua'i (91.9%) and Maui (91.2%) compared to the other islands. Beach/sunbathing was similarly popular on Maui (84%) and on Kaua'i (83.9%).
- A higher percentage of U.S. West visitors went backpacking/hiking/camping (34.2%) on Kaua'i.

Sightseeing: Most U.S. West visitors in 2016 participated in sightseeing activities statewide (96.9%), across all island locations: Kaua'i (93.6%), Maui (91%), O'ahu (87.8%), Kona (87.4%) and Hilo (84.2%).

- Statewide, most went on self-guided sightseeing excursion (88.7%), a few visited local communities (41.5%), or went on boat/submarine/whale watching tours (28%).

Historical and cultural activities: Three out of four U.S. West visitors engaged in historical and cultural activities (74.4%) statewide. Lū'aus (29.1%), museums/art galleries (26.2%), historical military sites (25.5%) and other historical sites (36.8%) were popular attractions.

Transportation: Nine out of ten U.S. West visitors used some mode of transportation (93.4%) and the majority of the respondents used rental cars (82.6%). Some visitors used airport shuttles (23.4%), taxis/limos (11.1%) and tour buses/tour vans (10.9%).

U.S. East

Entertainment and dining: Nearly all U.S. East visitors engaged in these activities (99.1%).

- Over half of the respondents ate at family restaurants while on O'ahu (63.7%), Maui (58.6%), Kaua'i (58.8%) and Kona (53.4%).
- More U.S. East visitors indulged in fine dining (59.2%) while on Maui compared to other island destinations.
- A third of the respondents prepared their own meals while on Kaua'i (44%), O'ahu (30.3%), Maui (35.9%), and Kona (31.6%).

Sightseeing: Most U.S. East visitors in 2016 participated in sightseeing activities statewide (98.3%), and participation rates were high across all island locations: Maui (93.6%), Kaua'i (92.2%), O'ahu (92%), Kona (88.6%) and Hilo (87.4%).

- The majority went on self-guided sightseeing excursion (86.2%), some visited local communities (43.3%), went on boat/submarine/whale watching tours (36%) and took private limousine/van tours (22.4%).

Shopping: Most U.S. East visitors did some shopping (97.8%) during their visit to the islands. The majority of the respondents shopped while on O'ahu (89.3%), Maui (89%), Kauai (85.7%) and in Kona (74.6%).

- Over half of the respondents on Kaua'i (71.6%), Maui (70.6%), and O'ahu (59.5%) shopped in local shops/artisans.
- While on O'ahu, department stores (50.8%) and convenience stores (50.3%) were the next most popular.
- While on Maui (56.7%), Kaua'i (54.5%) and Kona (51.6%), over half of U.S. East respondents shopped in supermarkets.

Recreation: Most U.S. East respondents in 2016 participated in recreation activities (97.5%) statewide.

- The majority went to the beach for sunbathing (88.1%) and swimming/snorkeling (71%). Visiting state parks/botanical gardens (65%), running/jogging/fitness walking (39.4%), and backpacking/hiking/camping (34.5%) were also popular with this group of visitors.
- In 2016, a similar percentage of U.S. East visitors went sunbathing/beach while on O'ahu (75.4%), Maui (78.6%) and Kaua'i (74.8%).
- State parks/botanical gardens were especially popular with U.S. East visitors while they were on Kaua'i (60.1%) and Hilo (60.4%)

Historical and cultural activities: Eight out of ten U.S. East visitors engaged in historical and cultural activities (84.5%), and most of their participation took place on O'ahu. The majority of the respondents visited historical military sites (66.6%). Three out of ten respondents visited other historical sites (36.7%) and attended lū'aus (30.7%) and Polynesian shows/hula shows (28.6%).

Transportation: Nine out of ten U.S. East visitors used some mode of transportation (93.7%) statewide. The majority of the respondents rented cars (77.6%), while some used airport shuttles (27.6%) and tour buses/tour vans (24.1%).

Japan

Similar to previous years, much of the activities that Japanese visitors participated in were concentrated on O'ahu.

Shopping: Nearly all Japanese respondents in 2016 went shopping (96.6%) statewide.

- Department stores (80.3%) were the most popular, followed by convenience stores (65.2%), supermarkets (63.5%), duty free stores (48.6%), hotel stores (45.2%), designer boutiques (37.3%) and discount outlets (36.2%).
- Fewer Japanese respondents shopped in local shop/artisans (17.4%) compared to visitors from other markets.

Entertainment and dining: Most Japanese visitors participated in these activities statewide (93.8%).

- Over half of the respondents went on lunch/sunset/dinner/evening cruises (54.9%).
- Fast food establishments (52.3%) and cafés/coffee houses (49.6%) were also popular. Four out of ten Japanese respondents indulged in fine dining (39%) and 34 percent ate at family restaurants/diners. A fairly low percentage of respondents prepared their own meals (17.9%).

Sightseeing: Nine out of ten (90.2%) Japanese respondents in 2016 participated in sightseeing activities.

- Statewide, fewer Japanese visitors went on self-guided tours (54.6%) compared to U.S. West (88.7%), U.S. East (86.2%), Canadian (88.6%), European (78%) and Korean (74.7%) visitors.
- On O'ahu, 53.1 percent of the Japanese visitors opted for self-guided tours.
- While in Hilo (46.3%) and Kona (35%), a third of the respondents chose limos/van tours/tour buses to go sightseeing.

Recreation: The majority of Japanese respondents in 2016 participated in recreation (84%). Beach/sunbathing (65.7%) were the most popular, followed by swimming/snorkeling in the ocean (30.9%) and running/jogging/fitness walking (21.3%).

Historical and cultural activities: Close to half (47.8%) of Japanese respondents in 2016 engaged in these activities. A quarter of the visitors saw Polynesian shows/hula shows (22.9%), 13.6 percent visited historical military sites and 11.8 percent visited other historical sites.

Transportation: Japanese visitors in 2016 continued to be heaviest user of trolleys on O'ahu (54.5%) compared to other visitor groups. Usage of rental cars (21.3%) continued to be lower than other visitor markets statewide.

Canada

Canadian visitors continued to be strong participants in most activities during their time in Hawai'i. Much of their activities were concentrated on Maui and O'ahu.

Entertainment and dining: Nearly all Canadian respondents in 2016 participated in these activities statewide (99.1%).

- The majority of the respondents dined in family restaurants (75.8%) statewide. Café/coffee houses (58.1%) and fast food restaurants (51.3%) were also popular dining options.
- A higher percentage of Canadian visitors indulged in fine dining while on Maui (49.9%) compared to O'ahu (44.1%), Kaua'i (41.5%) and Kona (39%).
- More respondents went to live acts/stage shows (32.9%) and ethnic restaurants (29.6%) while on O'ahu.
- Statewide, more Canada respondents prepared their own meals (74%) than other visitor groups.

Recreation: Most Canadian respondents in 2016 participated in recreation statewide (98.7%). Beach/sunbathing (85.4%) and swimming/snorkeling in the ocean (75.5%) were very popular activities, especially on Maui. Running/jogging/walking were similarly popular among Canadian visitors while on Maui (43.7%) and Kaua'i (42%).

Shopping: Most Canadian respondents in 2016 went shopping (98.2%) statewide.

- A higher percentage of Canadians shopped at supermarkets (76%), farmer's markets (47.4%) and swap meets (27.4%) compared to other visitor markets.
- While on O'ahu, the majority of Canadian visitors shopped in department stores (65.1%), and convenience stores (60.4%).
- While on Maui, seven out of ten Canadian visitors shopped in supermarkets (70.3%) and local shops/artisans (70.9%).

Sightseeing: Canadian visitors in 2016 actively participated in sightseeing activities (97.7%) statewide. Participation rates were similarly high across all island locations: Maui (93.7%), Kaua'i (91.5%), Kona (90.8%), Hilo (88.9%) and O'ahu (88.3%).

- Statewide, the majority went sightseeing self-guided (88.6%), while some visited local communities (44.9%), or went on boat/submarine/whale watching tours (29.7%).
- Boat/submarine/whale watching tours (29.7%) on Maui were popular with Canadian visitors, so were helicopter/plane tours (21.9%) on Kaua'i.

Historical and cultural activities: Three out of four Canadian visitors participated in culture activities (75.8%) statewide. Visits to historic military sites (49.4%), other historical sites (29.6%) and Polynesian shows/hula shows (27.2%) largely took place on O'ahu.

Transportation: Most Canadian visitors statewide used some mode of transportation (96.7%). More respondents utilized rental cars while on Maui (80.7%) and Kaua'i (78.6%) compared to other island destinations.

Europe

Entertainment and dining: Nearly all European respondents in 2016 participated in these activities (98.6%). Statewide, these respondents liked to eat in cafés/coffee houses (61%), family restaurants (59.4%), fine dining restaurants (52.1%) and fast food places (51.8%), while 43.4 percent prepared their own meals.

Recreation: A high percentage of European respondents (98.2%) participated in recreation, particularly beach/sunbathing (92%). Visiting state parks/botanical gardens (56.1%), snorkeling/scuba diving (47.3%) and surfing/body boarding (28.1%) were also popular with these visitors.

Shopping: Most Europeans went shopping (97.9%) statewide. The majority shopped in department stores (73.3%), supermarkets (71.8%) and local shops/artisans (66.1%). Other popular venues included hotel stores (40.2%), convenience stores (39.4%), farmer's markets (34.3%), designer boutiques (31%) and discount/outlets (28.1%).

Sightseeing: Most European respondents participated in sightseeing activities (97.7%). Participation rates were very high on all island locations: Maui (92.7%), Kaua'i (91.5%), O'ahu (91.4%), Kona (91.3%), and Hilo (90.4%), and the majority went on self-guided sightseeing tours.

Historical and cultural activities: Eight out of ten European visitors participated in these activities statewide (81.5%). Half of the respondents went to historic military sites (45%). Some visited other historical sites (38.4%), attended Polynesian shows/hula shows (28.9%), lū'au (23.7%) and museum/art galleries (22.9%).

Transportation: Most European visitors used some mode of transportation (97.3%) statewide. Two-thirds of the respondents rented cars (67.7%), while some used airport shuttles (35%), taxis/limousines (29.7%), tour buses/tour vans (23.9%) and public buses (23.5%).

Oceania

Many of the activities that respondents from Oceania participated in were concentrated on O'ahu.

Entertainment and dining: Nearly all Oceania respondents in 2016 participated in these activities statewide (99.1%). The majority of the respondents liked to dine in family restaurants (76.2%) and cafés/coffee houses (65.9%). Half of the respondents ate in fast food restaurants (52.2%), indulged in fine dining (44.9%) while 22.3 percent prepared their own meals.

Shopping: Statewide, most Oceania visitors participated in shopping (98.9%). While on O'ahu, eight out of ten respondents shopped in department stores (85.7%). Other popular venues on O'ahu included convenience stores (71.3%), local shops/artisans (63.2%), discount/outlets (50.7%), hotel stores (48.5%) and supermarkets (47.5%).

Recreation: While on O'ahu, the majority of the respondents went to the beach/sunbathing (84.7%) and swimming/snorkeling in the ocean (64.4%). Visiting state parks/botanical gardens (32%) and running/jogging/fitness walk (31%) were also popular activities with this group.

Sightseeing: while on O'ahu, fewer Oceania visitors went on self-guided tours (40.4%) than visitors from other markets. A higher percentage of Oceania respondents went on limos/van tours/tour buses (37.9%) compared to other visitor groups.

Historical and cultural activities: Eight out of ten European visitors participated in culture activities statewide (78.6%). While on O'ahu, over half of these respondents went to historic military sites (55.7%). Some also visited other historical sites (26.3%), attended a lū'au (23%) or saw Polynesian shows/hula shows (22.4%).

Transportation: While on O'ahu, the majority of Oceania respondents used airport shuttles (59.8%). Some respondents used taxis/limousines (45.2%), tour buses/vans (41%) and public buses (32%). Usage of rentals cars (23.6%) were fairly low.

China

Most of the activities that Chinese respondents participated in took place on O'ahu.

Shopping: Nearly all Chinese respondents went shopping (93.2%) while on O'ahu. The majority shopped in department stores (78.1%) and duty free stores (71.1%). Some respondents shopped in convenience stores (44%), supermarkets (36.4%), discount outlets (27.9%), hotel stores (26.4%) and local shops/artisans (25%). Less than half of the respondents shopped while on Maui, Kaua'i, Hilo and Kona, and much of the shopping took place in department stores or supermarkets.

Historical and cultural activities: A high percentage of Chinese respondents participated in these activities (86.1%) while on O'ahu, and the majority visited historic military sites (77.7%). Some respondents visited other historical sites (31.3%), attended Polynesian shows/hula shows (20.4%) and visited museum/art galleries (13.9%).

Entertainment and dining: Nine out of ten Chinese respondents participated in entertainment and dining activities while on O'ahu (86%). The majority of the respondents went on lunch/sunset/dinner/evening cruises (64.4%) and 42.6 percent indulged in fine dining. Some respondents dined in fast food restaurants (36.9%), cafés/coffee houses (26%) and family restaurants/diners (22%). While on Maui, Hilo or Kona, a third of the Chinese respondents went on lunch/sunset/dinner/evening cruises.

Recreation: A high percentage of Chinese respondents participated in recreation (85.5%) while on O'ahu. Beach/sunbathing (78.1%) was the most popular activity, followed by visiting state parks/botanical gardens (32.2%) and swimming/snorkeling in the ocean (24.9%).

Sightseeing: While on O'ahu, 85 percent of Chinese respondents participated in sightseeing activities and 54.3 percent went on self-guided tours. Some respondents went on private limousines/van tours (24.5%), visited communities (17.4%) and took boat tours/submarines/whale watching tours (16.9%).

Transportation: While on O'ahu 86.1 percent of Chinese respondents used some mode of transportation. Four out of ten respondents used tour buses/tour vans (43.9%), 30.8 percent used airport shuttles, 29.2 percent rented cars, 19.2 percent took taxis/limousines and 17.3 percent used public buses.

Korea

Many of the activities that Korean respondents participated in were concentrated on O'ahu.

Sightseeing: Most Korean respondents participated in sightseeing activities (96.5%) while on O'ahu. Two-thirds of the respondents went on self-guided tours (68.6%). Some respondents went on private limousines/van tours (20.6%), visited communities (14.7%), movies/television filming location tours (12%) and boat tours/submarines/whale watching tours (10.1%).

Shopping: Nearly all Korean respondents went shopping (95.6%) while on O'ahu and the majority shopped in department stores (88.9%) and discount outlets (77.4%). Supermarkets (65.6%), convenience stores (63%), duty-free stores (58.7%) and hotel stores (51.3%) were also popular shopping venues.

Entertainment and dining: Nearly all Korean respondents participated in entertainment and dining activities while on O'ahu (94%). Six out of ten respondents dined in fast food restaurants (62.3%) and cafés/coffee houses (57.3%) while half of the respondents ate in family restaurants

(50.9%), indulged in fine dining (50.6%) and went on lunch/sunset/dinner/evening cruises (46.5%). While on Maui, a third of the Korean respondents indulged in fine dining (33.3%) or went on lunch/sunset/dinner/evening cruises (30%).

Recreation: Nine out of ten Korean respondents participated in recreation (93.2%) while on O’ahu. The majority went to the beach/sunbathing (82.3%) and swimming/snorkeling in the ocean (66.2%).

Historical and cultural activities: Half of the Korean respondents in 2016 engaged in historical and cultural activities (48.9%) while on O’ahu. A quarter of the visitors saw Polynesian shows/hula shows (23%), 14.2 percent visited historical military sites and 14.8 percent visited other historical sites.

Transportation: While on O’ahu, half of the Korean respondents used rental cars (49.5%). Some respondents used tour buses/tour vans (36.2%), trolleys (30.4%), taxis/limousines (24.5%) and airport shuttles (22.2%)

TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. Respondents from Japan, China and Korea in 2016 have a relatively short time frame where much of the decisions to take a vacation and the process of booking their trip to Hawai’i occurred within three months before their arrivals. Visitors from U.S. West, U.S. East, Canada, Europe and Oceania planned much farther in advance.

**Figure 17: Trip Decision Making - U.S. West
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 4.3% | 19.5% | 11.7% | 30.7% | 29.4% | 4.5% | N/A |
| Decide to visit Hawai’i | 4.7% | 18.9% | 11.5% | 30.2% | 29.9% | 4.8% | N/A |
| Decide on which islands to visit | 3.4% | 17.2% | 12.1% | 31.3% | 31.6% | 4.5% | 10.6% |
| Set date for the trip | 1.9% | 13.0% | 12.3% | 30.5% | 36.6% | 5.7% | 12.1% |
| Choosing a place to stay | 1.9% | 11.5% | 11.1% | 30.0% | 38.6% | 6.9% | 11.5% |
| Make airline reservations | 0.2% | 4.9% | 9.4% | 32.7% | 46.0% | 6.7% | 11.2% |
| Purchase airline tickets | 0.1% | 4.5% | 9.1% | 32.2% | 47.1% | 7.0% | 11.4% |
| Make accommodation reservations | 1.5% | 10.5% | 11.0% | 29.2% | 40.8% | 7.1% | 12.3% |
| Make rental car reservations | 0.1% | 2.8% | 5.9% | 23.7% | 56.7% | 10.9% | 14.2% |
| Purchase tour or attraction packages | 0.1% | 1.1% | 2.4% | 13.3% | 62.1% | 21.0% | 44.8% |

The majority of U.S. West respondents in 2016 made the decision to take a vacation (64.5%) and to choose Hawai’i as a vacation destination (64.9%) within six months before their trip. Actual reservations and ticket purchases took place closer to the date of travel. Within 3 months of their trip to the islands, half of the respondents made airline reservations (52.8%), purchased tickets (54.1%), and made accommodation reservations (47.8%), while 67.5 percent made rental car reservations. Over 60 percent purchased tour or attraction packages between one to three months out, but 21 percent waited until less than one month before arrival. Additionally, 44.8 percent purchased packaged tours during their trip.

**Figure 18: Trip Decision Making - U.S. East
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 6.5% | 23.2% | 13.2% | 29.8% | 23.8% | 3.5% | N/A |
| Decide to visit Hawai'i | 7.0% | 20.9% | 13.6% | 30.2% | 24.2% | 4.1% | N/A |
| Decide on which islands to visit | 4.8% | 18.1% | 13.6% | 31.3% | 27.9% | 4.3% | 11.6% |
| Set date for the trip | 2.6% | 15.1% | 14.3% | 32.0% | 31.6% | 4.5% | 9.8% |
| Choosing a place to stay | 2.3% | 13.1% | 13.1% | 30.8% | 34.3% | 6.4% | 9.6% |
| Make airline reservations | 0.2% | 5.7% | 12.1% | 33.5% | 42.3% | 6.2% | 10.0% |
| Purchase airline tickets | 0.1% | 5.3% | 11.6% | 33.8% | 43.1% | 6.0% | 9.8% |
| Make accommodation reservations | 1.2% | 10.9% | 13.1% | 30.7% | 37.3% | 6.7% | 10.0% |
| Make rental car reservations | 0.1% | 3.3% | 7.9% | 24.8% | 53.6% | 10.2% | 14.3% |
| Purchase tour or attraction packages | 0.2% | 2.2% | 3.4% | 15.6% | 62.3% | 16.3% | 55.5% |

Over half of U.S. East respondents decided on a vacation (57.1%) and decided to visit Hawai'i (58.5%) within six months before arrival. Half of the respondents made their airline reservations (48.5%), purchased their airline tickets (49.2%) and made their lodging reservations (44%) within 3 months before their trip. The majority waited three months or less to make car reservations (63.8%) and purchase tour packages (78.6%). Over half of the U.S. East respondents purchased packaged tours while their trip was in progress.

**Figure 19: Trip Decision Making - Japan
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 1.5% | 11.9% | 7.1% | 35.3% | 39.8% | 4.4% | N/A |
| Decide to visit Hawai'i | 1.6% | 12.0% | 6.7% | 34.1% | 41.5% | 4.0% | N/A |
| Decide on which islands to visit | 1.3% | 11.0% | 6.5% | 33.9% | 43.2% | 4.0% | 6.4% |
| Set date for the trip | 0.8% | 8.5% | 6.3% | 31.3% | 47.8% | 5.3% | 12.9% |
| Choosing a place to stay | 0.5% | 5.4% | 6.0% | 30.4% | 52.4% | 5.3% | 4.8% |
| Make airline reservations | 0.7% | 6.6% | 5.8% | 30.2% | 51.4% | 5.3% | 5.1% |
| Purchase airline tickets | 0.6% | 5.2% | 5.7% | 27.4% | 55.0% | 6.1% | 3.9% |
| Make accommodation reservations | 0.6% | 6.4% | 6.0% | 29.1% | 52.0% | 5.9% | 4.1% |
| Make rental car reservations | 0.7% | 2.5% | 2.6% | 16.5% | 60.3% | 17.4% | 4.3% |
| Purchase tour or attraction packages | 0.5% | 1.3% | 1.5% | 11.2% | 69.2% | 16.3% | 21.7% |

Japanese visitors in 2016 continued to have a relatively short planning and booking window. Three months or less before their arrival, 44.2 percent of the respondents decided to take a vacation, 45.5 percent decided to visit Hawai'i and 47.2 percent decided on the islands they wanted to visit. Within three months of their trip, over half of the respondents made airline reservations (56.7%), purchased airline tickets (61.1%), and made accommodation reservations (57.8%). Also within three months before arriving in Hawai'i, the majority of the respondents made rental car reservations (77.7%) and purchased tour and attraction packages (85.5%). A quarter of the ten respondents also purchased tour packages during their trip.

**Figure 20: Trip Decision Making - Canada
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 5.3% | 24.3% | 11.1% | 28.0% | 26.5% | 4.9% | N/A |
| Decide to visit Hawai'i | 5.4% | 22.7% | 11.4% | 27.1% | 28.2% | 5.2% | N/A |
| Decide on which islands to visit | 4.1% | 20.5% | 11.7% | 27.0% | 31.0% | 5.7% | 9.5% |
| Set date for the trip | 2.8% | 17.1% | 12.6% | 29.1% | 32.6% | 5.8% | 8.9% |
| Choosing a place to stay | 2.8% | 15.2% | 11.9% | 26.8% | 36.9% | 6.4% | 9.9% |
| Make airline reservations | 0.3% | 8.1% | 12.4% | 31.0% | 41.4% | 6.8% | 9.4% |
| Purchase airline tickets | 0.3% | 7.8% | 12.1% | 30.7% | 42.2% | 6.8% | 9.1% |
| Make accommodation reservations | 2.3% | 14.0% | 12.6% | 26.8% | 37.7% | 6.6% | 9.4% |
| Make rental car reservations | 0.1% | 4.4% | 6.7% | 23.2% | 55.6% | 9.9% | 16.1% |
| Purchase tour or attraction packages | 0.5% | 1.5% | 2.9% | 10.3% | 63.8% | 21.0% | 51.3% |

Similar to U.S. East visitors, over half of Canadian respondents in 2016 decided on a vacation (59.4%), decided to visit Hawai'i (60.5%) and decided on which islands to visit (63.6%) within six months prior to arrival. Half of the respondents purchased airline tickets (49%) and reserved accommodations (44.3%) within three months before their trip. The majority made car reservations (65.6%) and purchased tour packages (84.8%) in the last three months before arriving. Half of the respondents purchased tour packages while their trip is in progress.

**Figure 21: Trip Decision Making - Europe
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 6.4% | 24.3% | 15.1% | 30.8% | 20.1% | 3.2% | N/A |
| Decide to visit Hawai'i | 6.9% | 22.4% | 16.1% | 30.7% | 21.1% | 2.9% | N/A |
| Decide on which islands to visit | 3.1% | 18.8% | 16.2% | 31.8% | 25.8% | 4.3% | 13.1% |
| Set date for the trip | 3.2% | 17.3% | 17.1% | 33.4% | 25.2% | 3.8% | 10.1% |
| Choosing a place to stay | 2.2% | 13.2% | 14.5% | 30.9% | 33.9% | 5.2% | 13.4% |
| Make airline reservations | 0.7% | 12.0% | 16.1% | 32.6% | 33.1% | 5.5% | 10.5% |
| Purchase airline tickets | 0.6% | 11.7% | 15.7% | 32.2% | 34.3% | 5.5% | 9.5% |
| Make accommodation reservations | 1.1% | 11.3% | 14.7% | 30.4% | 36.9% | 5.6% | 10.2% |
| Make rental car reservations | 0.1% | 5.1% | 10.6% | 23.7% | 49.2% | 11.2% | 18.5% |
| Purchase tour or attraction packages | 0.5% | 3.9% | 5.1% | 25.8% | 52.0% | 12.8% | 55.1% |

Half of the European respondents took six months or less to decide to take a vacation (54.1%) and to pick Hawai'i as the destination (54.7%). Close to 40 percent of the respondents made their airline reservations (38.6%), purchased airlines tickets (39.8%) and made their lodging reservations (42.5%) within three months prior to arriving. The majority made car reservations (60.5%) and purchased tour packages (64.8%) within three months before their arrival date. Over half of the respondents purchased tour and attraction packages during their trip.

**Figure 22: Trip Decision Making - Oceania
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 7.3% | 25.8% | 16.1% | 32.2% | 17.4% | 1.2% | N/A |
| Decide to visit Hawai'i | 5.3% | 23.3% | 16.8% | 34.7% | 18.4% | 1.5% | N/A |
| Decide on which islands to visit | 3.2% | 20.4% | 16.7% | 35.9% | 21.6% | 2.2% | 11.5% |
| Set date for the trip | 2.9% | 20.5% | 18.1% | 36.1% | 20.6% | 1.8% | 11.0% |
| Choosing a place to stay | 1.1% | 11.1% | 16.1% | 36.2% | 31.9% | 3.6% | 11.8% |
| Make airline reservations | 0.9% | 14.2% | 18.2% | 39.2% | 25.4% | 2.2% | 8.6% |
| Purchase airline tickets | 0.6% | 13.4% | 17.8% | 39.3% | 26.5% | 2.5% | 8.7% |
| Make accommodation reservations | 0.5% | 9.5% | 16.1% | 36.8% | 33.7% | 3.5% | 10.7% |
| Make rental car reservations | 0.3% | 4.9% | 6.9% | 24.8% | 53.8% | 9.4% | 17.8% |
| Purchase tour or attraction packages | 0.5% | 5.3% | 9.4% | 25.5% | 45.0% | 14.2% | 59.7% |

Half of the Oceania respondents decided to take a vacation (50.8%) and decided to visit Hawai'i (54.6%) within six months before arrival. Close to 40 percent respondents made airlines reservations (39.2%), purchased tickets (39.3%), made accommodation reservations (36.8%) between four to six months before their trip. The majority reserved rental cars (63.2%) and purchased tour/attraction packages (59.3%) within three months of arrival, and many also purchased tour and attraction packages (59.3%) during their trip.

**Figure 23: Trip Decision Making - China
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 0.0% | 2.6% | 4.3% | 30.5% | 49.4% | 13.3% | N/A |
| Decide to visit Hawai'i | 0.8% | 3.7% | 3.7% | 25.9% | 57.1% | 8.9% | N/A |
| Decide on which islands to visit | 0.7% | 1.4% | 3.3% | 25.2% | 58.4% | 11.0% | N/A |
| Set date for the trip | 0.0% | 2.7% | 4.4% | 30.8% | 55.8% | 6.3% | N/A |
| Choosing a place to stay | 0.0% | 0.9% | 1.1% | 19.0% | 63.7% | 15.3% | 10.3% |
| Make airline reservations | 0.0% | 1.7% | 1.7% | 16.3% | 66.0% | 14.4% | 13.6% |
| Purchase airline tickets | 0.0% | 2.1% | 2.1% | 17.2% | 60.8% | 17.9% | 9.8% |
| Make accommodation reservations | 0.0% | 0.0% | 1.1% | 15.1% | 65.0% | 18.8% | 9.1% |
| Make rental car reservations | 0.0% | 0.0% | 0.0% | 8.9% | 62.3% | 28.7% | 8.5% |
| Purchase tour or attraction packages | 0.0% | 0.0% | 0.0% | 5.5% | 63.8% | 30.7% | 14.7% |

Many Chinese respondents in 2016 made their travel decisions in a relatively short time. Between one to three months prior to arrival, over half of the respondents decided to visit Hawai'i (57.1%), decided on the islands they wanted to visit (58.4%) and set their travel dates (55.8%). The majority also made airline reservations, purchased airline tickets, made accommodation reservations, made rental car reservations, and purchased tour and attraction packages between one to three months before their trip.

**Figure 24: Trip Decision Making - Korea
(Percent of Visitors for Each Response, 2016)**

| | TIME BEFORE DEPARTURE | | | | | | During the trip |
|---------------------------------------|-----------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 0.0% | 3.8% | 4.7% | 25.5% | 47.1% | 18.9% | N/A |
| Decide to visit Hawai'i | 0.4% | 4.5% | 3.2% | 25.6% | 48.7% | 17.7% | N/A |
| Decide on which islands to visit | 0.0% | 3.5% | 5.2% | 20.4% | 49.5% | 21.3% | N/A |
| Set date for the trip | 0.0% | 4.0% | 5.4% | 24.4% | 48.5% | 17.8% | N/A |
| Choosing a place to stay | 0.0% | 1.5% | 4.2% | 18.7% | 53.1% | 22.5% | 12.7% |
| Make airline reservations | 0.0% | 2.9% | 5.1% | 27.2% | 46.4% | 18.4% | 29.7% |
| Purchase airline tickets | 0.0% | 3.2% | 5.8% | 26.7% | 48.6% | 15.7% | 31.6% |
| Make accommodation reservations | 0.0% | 1.4% | 3.0% | 18.0% | 56.6% | 21.0% | 27.7% |
| Make rental car reservations | 0.0% | 0.4% | 2.1% | 6.9% | 53.3% | 37.3% | 22.7% |
| Purchase tour or attraction packages | 0.0% | 1.0% | 2.5% | 9.0% | 48.1% | 39.4% | 31.3% |

Half of the Korean respondents in 2016 decided to visit Hawai'i (48.7%), decided on the islands they wanted to visit (49.5%) and set a travel date (48.5%) within one to three months before their arrival. During this period, half of the respondents also made accommodation reservations, made rental car reservations and purchased tour and attraction packages.

A third of the respondents decided to visit multiple islands, and made their airlines reservations, purchased airline tickets, and made accommodation reservations during their trip.

Sources of Information Used to Plan Trip

Visitors used a variety of resources to plan their trips to Hawai'i. Figure 25 shows the sources of information utilized by 2016 visitors from each market.

U.S. West

Many U.S. West respondents in 2016 relied on their personal experience (60.7%) and recommendations from friends and relatives (49.9%) in planning their trip to Hawai'i prior to departure. Information from airlines (36.5%), mobile apps (35.1%), online travel booking sites (31.9%), and webpages or blogs covering Hawai'i (30.6%) were also heavily utilized. Only 18.9 percent sought assistance from travel agents, the lowest among the visitor markets.

While their trip is in progress, U.S. West visitors relied on personal experience (44.5%), mobile apps (37.4%), information from hotels and resorts (34.3%) and guide books (24.8%) to find information about Hawai'i.

U.S. East

Before coming to the islands, U.S. East respondents relied heavily on recommendations from friends and relatives (52.3%) and personal experience (49.5%) in their trip planning. Webpages or blogs covering Hawai'i (36%), mobile apps (35.5%), information from airlines (35.5%) and online travel booking sites (31.4%) were also popular resources.

During their trip, U.S. East visitors relied on information from hotels and resorts (41.4%), mobile apps (40.4%), personal experience (37.7%), guide books (28.9%), friends and relatives (26%), online social networking sites (20.2%) and webpages or blogs covering Hawai'i (19.3%).

**Figure 25: Resources Used in Planning their Trip to Hawai'i – 2016
(Percentage of Respondents Who used these Information)**

| | | VISITOR MARKETS | | | | | | | |
|--|-------------|-----------------|-----------|-------|--------|--------|---------|-------|-------|
| | | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Travel agent/ company specializing in package tours | Before | 18.9% | 27.8% | 58.9% | 20.7% | 44.2% | 59.8% | 56.9% | 51.4% |
| | During | 7.1% | 10.8% | 12.6% | 8.8% | 11.2% | 10.4% | 30.4% | 11.7% |
| | After | 1.5% | 1.6% | 2.4% | 1.3% | 1.5% | 2.1% | 11.6% | 2.1% |
| | Did Not Use | 75.5% | 66.4% | 37.8% | 72.7% | 48.5% | 35.8% | 39.3% | 42.6% |
| Social networking site | Before | 26.5% | 30.5% | 26.3% | 34.5% | 37.7% | 33.2% | 22.9% | 55.6% |
| | During | 17.3% | 20.2% | 10.4% | 21.1% | 25.2% | 19.8% | 8.1% | 30.3% |
| | After | 6.7% | 7.3% | 4.2% | 6.5% | 8.1% | 5.7% | 3.2% | 6.6% |
| | Did Not Use | 68.0% | 62.8% | 69.8% | 60.2% | 53.4% | 58.9% | 74.0% | 33.6% |
| Friends/family | Before | 49.9% | 52.3% | 34.9% | 49.7% | 44.2% | 50.1% | 32.7% | 42.3% |
| | During | 25.3% | 26.0% | 7.8% | 19.0% | 16.7% | 14.7% | 12.1% | 9.6% |
| | After | 5.6% | 4.9% | 2.1% | 3.5% | 4.5% | 2.7% | 3.1% | 3.9% |
| | Did Not Use | 43.6% | 41.7% | 61.8% | 45.8% | 49.4% | 45.4% | 64.1% | 50.9% |
| Hotel/resort front desk/concierge/tour desk | Before | 16.6% | 17.8% | 20.7% | 14.6% | 16.7% | 13.4% | 14.7% | 32.5% |
| | During | 34.3% | 41.4% | 24.7% | 34.3% | 41.1% | 48.0% | 10.4% | 15.0% |
| | After | 1.6% | 1.3% | 1.5% | 1.1% | 1.3% | 1.2% | 1.2% | 0.9% |
| | Did Not Use | 54.1% | 48.1% | 59.5% | 55.3% | 46.5% | 40.8% | 77.2% | 54.4% |
| Mobile apps- relevant to trip | Before | 35.1% | 35.5% | 34.4% | 33.3% | 32.7% | 29.7% | 21.2% | 38.9% |
| | During | 37.4% | 40.4% | 20.2% | 34.1% | 37.0% | 31.8% | 12.9% | 24.6% |
| | After | 6.7% | 6.6% | 5.0% | 5.3% | 5.7% | 3.3% | 3.1% | 3.4% |
| | Did Not Use | 51.0% | 49.6% | 57.9% | 54.1% | 51.0% | 54.6% | 73.7% | 47.8% |
| Airline/commercial carrier | Before | 36.5% | 35.5% | 20.9% | 34.1% | 34.5% | 31.7% | 14.8% | 37.0% |
| | During | 10.4% | 12.3% | 5.5% | 10.6% | 13.8% | 10.0% | 4.8% | 3.0% |
| | After | 2.0% | 2.3% | 1.4% | 1.9% | 1.2% | 1.4% | 1.6% | 1.0% |
| | Did Not Use | 59.8% | 60.9% | 75.6% | 62.2% | 59.2% | 62.4% | 82.8% | 60.6% |
| Personal experience | Before | 60.7% | 49.5% | 34.5% | 55.2% | 30.9% | 40.4% | 33.1% | 28.3% |
| | During | 44.5% | 37.7% | 9.5% | 36.8% | 25.5% | 24.9% | 22.7% | 12.0% |
| | After | 16.4% | 14.7% | 3.1% | 13.2% | 9.9% | 8.5% | 3.8% | 5.1% |
| | Did Not Use | 31.0% | 41.7% | 62.3% | 36.9% | 55.9% | 49.4% | 62.6% | 61.6% |
| Online travel booking site | Before | 31.9% | 31.4% | 32.3% | 39.9% | 41.3% | 38.9% | 23.2% | 34.3% |
| | During | 5.4% | 6.8% | 3.6% | 7.2% | 11.4% | 7.1% | 8.1% | 6.2% |
| | After | 1.6% | 1.3% | 2.0% | 1.7% | 1.3% | 1.2% | 2.6% | 1.1% |
| | Did Not Use | 66.6% | 66.7% | 66.1% | 58.3% | 55.8% | 58.7% | 74.2% | 61.9% |
| Webpage/blog- covering Hawai'i | Before | 30.6% | 36.0% | 42.4% | 41.7% | 43.1% | 35.4% | 17.7% | 47.4% |
| | During | 17.5% | 19.3% | 11.8% | 23.8% | 24.2% | 15.9% | 7.7% | 25.3% |
| | After | 3.5% | 3.7% | 8.4% | 4.6% | 4.5% | 2.9% | 2.7% | 4.0% |
| | Did Not Use | 64.0% | 59.5% | 54.1% | 52.5% | 49.8% | 58.7% | 79.1% | 45.1% |
| GoHawaii.com | Before | 20.2% | 27.5% | 20.0% | 28.9% | 30.2% | 22.5% | 11.9% | 17.8% |
| | During | 8.5% | 10.8% | 3.4% | 13.7% | 15.7% | 11.3% | 4.1% | 3.7% |
| | After | 1.8% | 2.5% | 3.7% | 3.1% | 3.2% | 2.3% | 2.3% | 2.5% |
| | Did Not Use | 76.0% | 67.6% | 77.4% | 65.3% | 62.0% | 69.9% | 84.2% | 77.3% |
| Magazine | Before | 10.8% | 12.4% | 49.9% | 12.6% | 14.1% | 12.3% | 7.6% | 12.3% |
| | During | 13.1% | 12.7% | 20.1% | 16.5% | 17.3% | 11.1% | 4.2% | 5.1% |
| | After | 2.3% | 2.0% | 5.8% | 2.4% | 2.4% | 1.4% | 1.1% | 2.4% |
| | Did Not Use | 79.6% | 78.9% | 45.0% | 75.4% | 72.2% | 78.9% | 88.4% | 81.1% |
| Guidebook | Before | 23.8% | 28.8% | 43.7% | 31.0% | 45.2% | 17.3% | 7.3% | 26.4% |
| | During | 24.8% | 28.9% | 21.7% | 33.8% | 37.8% | 18.6% | 5.7% | 17.4% |
| | After | 2.7% | 2.9% | 4.1% | 3.6% | 4.4% | 1.3% | 1.1% | 2.6% |
| | Did Not Use | 64.6% | 58.9% | 50.3% | 53.7% | 44.0% | 69.4% | 88.3% | 63.1% |
| Television | Before | 3.7% | 4.2% | 28.5% | 3.8% | 4.7% | 3.6% | 2.9% | 11.8% |
| | During | 5.7% | 6.4% | 8.8% | 6.0% | 6.4% | 6.4% | 2.1% | 2.0% |
| | After | 1.0% | 1.1% | 8.3% | 1.6% | 1.9% | 1.0% | 1.0% | 1.1% |
| | Did Not Use | 90.9% | 89.6% | 66.6% | 90.5% | 88.4% | 89.8% | 94.8% | 85.4% |

Japan

Japanese respondents relied more on travel agents (58.9%) and less on recommendations from friends and relatives (34.9%) while planning their trip. Magazines (49.9%), guide books (43.7%), webpages or blogs covering Hawai'i (42.4%) and were also popular with Japanese visitors in their trip planning.

During the trip, Japanese respondents used information from hotels and resorts (24.7%), guide books (21.7%), magazines (20.1%) and mobile apps (20.2%) to access information about Hawai'i. Some Japanese respondents continued to seek information about Hawai'i after their trip through webpages or blogs (8.4%) and television shows (8.3%).

Canada

Canadian respondents in 2016 relied most heavily on personal experience (55.2%) and recommendations from friends and relatives (49.7%) when planning for their trip. In addition, many Canadians used webpages or blogs covering Hawai'i (41.7%), online travel booking sites (39.9%), information from airlines (34.1%) and mobile apps (33.3%). Only 20.7 percent used travel agents.

While their trip was in progress, many Canadian visitors used personal experience (36.8%), information from hotels and resorts (34.3%), mobile apps (34.1%) and guide books (33.8%) as resources.

Europe

Guide books (45.2%), travel agents (44.2%) and recommendations from friends and relatives (44.2%) were the most frequently used sources among European respondents in 2016 for trip planning. Webpages or blogs covering Hawai'i (43.1%) and online travel booking sites (41.3%) were also heavily used.

Many European visitors used information from hotels and resorts (41.1%), guide books (37.8%) and mobile apps (37%) as resources during their trip. After their trip, 8.1 percent of the respondents viewed online social networking sites for additional information about Hawai'i.

Oceania

Six out of ten respondents from Oceania used travel agents (59.8%) in trip planning. Recommendations from family and friends (50.1%), online travel booking sites (38.9%), personal experience (40.4%) and webpages or blogs covering Hawai'i (35.4%) were also important planning tools for these visitors.

During their trip, many Oceania respondents used information from hotels or resorts (48%) and mobile apps (31.8%).

China

Chinese respondents in 2016 relied heavily on travel agents (56.9%) to plan their trips to Hawai'i. A third of the respondents used their personal experience (33%) and sought recommendations from family and friends (32.7%). A quarter of the respondents used online travel booking sites (23.2%), social networking sites (22.9%) and mobile apps (21.2%).

During their trip, some respondents continued to rely on travel agents (26%) for information about Hawai'i.

Korea

Over half of the Korean respondents in 2016 used online social networking sites (55.6%) in their trip planning. Travel agents (51.4%), online webpage/blog about Hawai'i (47.4%), recommendations from friends/relatives (42.3%) and mobile apps (38.9%) were other popular resources.

While their trip was in progress, Korean respondents used online social networking sites (30.3%), online webpage/blog about Hawai'i (25.3%) and mobile apps (24.6%).

Ways Visitors Used Sources of Information

The 2016 VSAT survey inquired about how five important sources of information (Mobile apps, social media, travel agents, friends/relatives and hotel staff) were used by visitors for their trip to Hawai'i (See Figure 26).

Mobile Apps: The majority of respondents across all visitor groups, used mobile apps to access maps and directions. Chinese respondents also relied heavily on mobile apps for other aspects of their Hawai'i trip, including making airlines, accommodations, car and dining reservations, planning activities and finding places to shop.

Half of the respondents from U.S. West, U.S. East, Canada, Europe and Oceania used mobile apps to plan activities and make restaurant/dining reservations. Among Japanese respondents, usage of mobile apps was not as extensive compared to other visitor groups. In addition to accessing maps and directions, Japanese respondents used mobile apps to find places to shop.

Social Media: Many respondents across all visitor groups used social media in choosing their vacation destination, planning their activities, making restaurants/dining reservations and finding places to shop

Travel Agents: Visitors from Japan used travel agents more often than other resources when choosing a vacation destination, making airlines and lodging reservations and purchasing tour packages. Visitors from China, Europe, Oceania and Korea also relied heavily on travel agents to make airlines and lodging reservations.

Hotel Staff: Visitors sought assistance from hotel staffs to purchase tour packages, make restaurants/dining reservations, plan activities and find places to shop.

Friends and relatives: Recommendations from friends and relatives were important to many visitors when selecting their vacation destination, planning their activities, and finding places or shop or dine.

**Figure 26: How Sources of Information Were Used by Visitor Market
(Percentage of visitors by MMA, 2016)**

| | Major Market Areas | | | | | | | |
|--|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Deciding on your vacation destination | | | | | | | | |
| Mobile apps | 29.2% | 28.4% | 23.1% | 30.8% | 31.9% | 30.9% | 40.0% | 30.5% |
| Social media | 31.9% | 30.5% | 37.5% | 33.5% | 36.9% | 34.6% | 51.9% | 36.0% |
| Travel agent | 40.7% | 51.2% | 68.5% | 38.5% | 60.2% | 58.0% | 79.1% | 54.8% |
| Hotel staff | 10.3% | 11.8% | 20.2% | 7.8% | 7.3% | 5.4% | 18.4% | 9.2% |
| Friends and family | 71.0% | 71.5% | 57.9% | 76.5% | 73.7% | 71.3% | 82.1% | 73.2% |
| Planning activities | | | | | | | | |
| Mobile apps | 49.1% | 51.9% | 29.2% | 52.0% | 52.8% | 48.2% | 54.0% | 30.0% |
| Social media | 55.7% | 56.8% | 43.8% | 58.5% | 54.1% | 50.7% | 44.3% | 42.1% |
| Travel agent | 26.7% | 42.9% | 40.6% | 26.7% | 32.5% | 33.4% | 53.2% | 41.8% |
| Hotel staff | 57.8% | 61.8% | 32.0% | 56.5% | 56.6% | 50.8% | 29.5% | 27.7% |
| Friends and family | 69.5% | 70.7% | 38.8% | 68.6% | 61.1% | 53.3% | 41.1% | 40.4% |
| Making airline reservations | | | | | | | | |
| Mobile apps | 57.5% | 51.9% | 17.9% | 59.6% | 43.2% | 34.9% | 63.1% | 40.8% |
| Social media | 18.0% | 14.5% | 26.9% | 18.5% | 14.0% | 13.4% | 22.9% | 24.8% |
| Travel agent | 62.6% | 65.1% | 79.3% | 69.4% | 79.4% | 87.7% | 61.5% | 72.6% |
| Hotel staff | 1.6% | 1.2% | 3.7% | 1.8% | 0.9% | 1.1% | 4.1% | 6.6% |
| Friends and family | 21.4% | 20.6% | 15.7% | 18.4% | 14.2% | 9.7% | 16.6% | 17.6% |
| Making hotel or other lodging reservations | | | | | | | | |
| Mobile apps | 44.9% | 40.2% | 17.1% | 51.4% | 45.2% | 48.0% | 62.2% | 40.6% |
| Social media | 22.6% | 18.0% | 27.9% | 30.2% | 23.8% | 28.1% | 18.9% | 29.0% |
| Travel agent | 59.6% | 61.4% | 75.2% | 51.1% | 66.5% | 64.1% | 53.8% | 67.8% |
| Hotel staff | 8.8% | 8.0% | 8.3% | 8.8% | 4.6% | 4.8% | 8.6% | 8.6% |
| Friends and family | 30.7% | 27.9% | 19.3% | 30.8% | 21.1% | 18.8% | 19.3% | 22.0% |
| Making car rental reservations | | | | | | | | |
| Mobile apps | 49.5% | 43.6% | 10.5% | 54.4% | 40.3% | 24.9% | 56.9% | 34.7% |
| Social media | 16.0% | 13.4% | 17.5% | 21.3% | 13.8% | 7.7% | 16.8% | 24.8% |
| Travel agent | 48.8% | 39.6% | 8.8% | 35.4% | 35.0% | 10.7% | 35.3% | 43.2% |
| Hotel staff | 6.1% | 8.0% | 5.4% | 9.9% | 11.6% | 14.1% | 16.8% | 13.1% |
| Friends and family | 17.5% | 14.7% | 9.5% | 18.7% | 14.3% | 6.4% | 18.3% | 16.7% |
| Purchasing tour or attraction packages | | | | | | | | |
| Mobile apps | 34.7% | 39.5% | 18.3% | 35.9% | 39.6% | 34.5% | 55.5% | 31.4% |
| Social media | 27.6% | 29.3% | 29.3% | 28.1% | 24.4% | 20.5% | 25.3% | 29.0% |
| Travel agent | 29.6% | 42.9% | 47.6% | 28.7% | 26.3% | 26.7% | 45.4% | 51.1% |
| Hotel staff | 48.2% | 55.4% | 30.7% | 54.0% | 59.3% | 61.7% | 40.6% | 35.0% |
| Friends and family | 25.3% | 28.5% | 15.9% | 21.4% | 22.3% | 19.1% | 19.5% | 23.9% |
| Making restaurant/dining reservations | | | | | | | | |
| Mobile apps | 58.1% | 56.8% | 33.5% | 53.4% | 54.3% | 46.1% | 66.9% | 51.4% |
| Social media | 54.2% | 52.7% | 43.7% | 50.3% | 46.5% | 41.9% | 35.8% | 71.0% |
| Travel agent | 6.4% | 12.2% | 22.6% | 6.2% | 6.5% | 3.3% | 30.8% | 24.7% |
| Hotel staff | 43.4% | 52.6% | 48.8% | 42.3% | 37.2% | 34.7% | 33.6% | 28.7% |
| Friends and family | 57.5% | 54.9% | 32.8% | 50.0% | 42.2% | 44.5% | 20.8% | 44.2% |
| Finding a place to shop | | | | | | | | |
| Mobile apps | 44.1% | 42.4% | 63.7% | 41.9% | 48.7% | 49.4% | 66.5% | 50.7% |
| Social media | 35.6% | 30.3% | 60.3% | 32.9% | 33.7% | 42.0% | 38.2% | 69.4% |
| Travel agent | 4.4% | 7.4% | 11.9% | 4.6% | 3.2% | 5.3% | 26.1% | 23.6% |
| Hotel staff | 29.7% | 36.9% | 39.2% | 32.6% | 32.5% | 36.7% | 39.0% | 23.4% |
| Friends and family | 39.9% | 37.8% | 40.4% | 34.6% | 32.2% | 48.8% | 21.6% | 43.0% |
| Accessing maps/directions | | | | | | | | |
| Mobile apps | 83.8% | 82.8% | 68.8% | 77.2% | 77.3% | 71.4% | 66.2% | 73.4% |
| Social media | 23.7% | 20.1% | 50.6% | 24.0% | 20.2% | 17.6% | 19.5% | 27.6% |
| Travel agent | 5.9% | 8.5% | 14.6% | 8.7% | 7.1% | 4.3% | 8.1% | 18.7% |
| Hotel staff | 22.4% | 25.7% | 41.1% | 30.0% | 26.7% | 41.1% | 20.9% | 18.4% |
| Friends and family | 15.3% | 15.5% | 21.1% | 15.5% | 13.1% | 6.9% | 10.1% | 15.9% |
| Other trip planning | | | | | | | | |
| Mobile apps | 2.0% | 1.2% | 2.9% | 1.7% | 1.2% | 0.6% | 3.8% | 3.8% |
| Social media | 1.1% | 0.7% | 1.5% | 1.3% | 0.7% | 0.7% | 1.9% | 1.7% |
| Travel agent | 1.2% | 0.9% | 1.1% | 1.2% | 0.5% | 0.5% | 3.0% | 2.9% |
| Hotel staff | 0.6% | 1.2% | 0.8% | 1.3% | 0.2% | 0.4% | 4.1% | 0.6% |
| Friends and family | 0.9% | 1.1% | 2.6% | 1.2% | 1.1% | 0.3% | 2.7% | 1.4% |

SITUATIONS ENCOUNTERED

The 2016 VSAT Survey asked respondents if they encountered any of the following situations listed in Figure 27. Multiple responses were allowed.

**Figure 27: Situations Encountered While in Hawai'i
(Percentage of Visitors by MMA, 2016)**

| | Major Market Areas | | | | | | | |
|---|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Did not have these experiences | 53.8% | 50.5% | 62.0% | 54.4% | 51.8% | 42.1% | 58.8% | 57.3% |
| Severe weather/natural calamities | 10.0% | 8.5% | 3.9% | 10.5% | 9.9% | 4.5% | 1.7% | 4.9% |
| Service problems | 3.1% | 2.8% | 4.2% | 3.2% | 3.5% | 4.4% | 8.9% | 7.8% |
| Travel problems (cost, airport, airline, TSA/customs, cruise) | 0.5% | 0.5% | 0.9% | 0.6% | 0.5% | 0.8% | 1.0% | 0.8% |
| Accommodations (cost, location, service, pests, amenities, not as advertised) | 0.7% | 0.6% | 1.0% | 0.5% | 0.5% | 1.0% | 0.3% | 0.4% |
| Parking ticket/auto violations | 1.0% | 1.5% | 0.8% | 0.8% | 1.1% | 0.4% | 1.0% | 7.2% |
| Safety issues: | | | | | | | | |
| Verbal harassment | 2.6% | 2.7% | 1.2% | 2.2% | 2.3% | 2.4% | 1.4% | 3.9% |
| Solicited by drug dealers | 1.3% | 1.6% | 0.3% | 1.6% | 1.8% | 1.0% | 0.6% | 0.2% |
| Wallet/purse/valuables stolen | 0.8% | 0.7% | 1.1% | 0.7% | 0.7% | 0.6% | 1.3% | 2.3% |
| Car vandalized | 0.4% | 0.4% | 0.1% | 0.7% | 0.4% | 0.3% | 0.3% | 0.1% |
| Solicited by prostitutes | 0.3% | 0.6% | 0.6% | 0.4% | 0.5% | 0.7% | 0.6% | 1.1% |
| Physical violence/harm | 0.3% | 0.2% | 0.2% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% |
| Room vandalized/robbed | 0.1% | 0.1% | 0.1% | 0.2% | 0.2% | 0.1% | 0.3% | 0.3% |
| Seeing homeless | 33.7% | 40.0% | 25.6% | 32.8% | 37.6% | 49.8% | 25.6% | 17.8% |

- Over half of the respondents from U.S. West, U.S. East, Canada, Europe China and Korea, and 42.1 percent of respondent from Oceania did not experience any of these situations while in the islands.
- Half of the respondents from Oceania, a third of U.S. West, U.S. East, Canadian and European respondents, and a quarter of Japanese, Chinese and Korean respondents said they saw homeless people. However, seeing the homeless was a not factor in their likelihood of revisiting Hawai'i.
- Severe weather/natural calamities were issues for a few visitors, particularly with Canadian, U.S. West and European respondents.
- Chinese (8.9%) and Korean (7.8%) respondents reported more issues with the level of service they received compared to other visitor groups. More Korean respondents also received parking tickets (7.2%) than visitors from other markets.
- Very few visitors (less than 5 percent) reported verbal harassment, being approached by drug dealers, or having their valuables stolen.

VISITOR PROFILES

This section of the report includes a profile of 2016 Hawai'i visitors who participated in the VSAT survey. (See the companion Excel workbook of 2016 annual VSAT data tables posted on the HTA website for more details).

**Figure 28: 2016 Visitor Profile by Market
(Percentage of Visitors by MMA 2016)**

| | Major Market Areas | | | | | | | |
|----------------------------|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| LIFESTYLE/LIFESTAGE | | | | | | | | |
| Get married/honeymoon | 3.8% | 5.8% | 14.0% | 4.8% | 13.8% | 4.0% | 12.5% | 44.9% |
| Family | 25.2% | 17.9% | 16.9% | 22.8% | 12.4% | 22.3% | 21.4% | 10.0% |
| Young | 11.5% | 12.6% | 11.4% | 12.8% | 17.3% | 10.0% | 18.7% | 25.1% |
| Middle age | 20.9% | 24.5% | 19.5% | 23.0% | 30.9% | 20.8% | 26.4% | 17.4% |
| Seniors | 38.6% | 39.2% | 38.1% | 36.6% | 25.7% | 42.9% | 21.1% | 2.7% |
| VISITATION STATUS | | | | | | | | |
| First time | 19.0% | 41.5% | 38.2% | 34.1% | 70.8% | 53.2% | 81.6% | 80.9% |
| Repeat | 81.0% | 58.5% | 61.8% | 65.9% | 29.2% | 46.8% | 18.4% | 19.1% |
| EMPLOYMENT | | | | | | | | |
| Self-employed | 14.1% | 11.4% | 12.3% | 17.1% | 14.3% | 16.3% | 14.3% | 16.5% |
| Employed, for someone else | 55.3% | 59.2% | 37.9% | 53.2% | 64.1% | 57.2% | 44.5% | 49.1% |
| Retired | 23.0% | 22.5% | 14.0% | 23.5% | 13.1% | 20.8% | 25.7% | 1.8% |
| Student | 1.9% | 2.1% | 3.6% | 2.2% | 3.8% | 1.7% | 3.1% | 7.0% |
| Homemaker | 3.7% | 3.0% | 15.3% | 2.3% | 1.1% | 2.4% | 0.8% | 9.8% |
| Other | 2.0% | 1.8% | 17.0% | 1.7% | 3.6% | 1.6% | 11.5% | 15.9% |
| EDUCATION | | | | | | | | |
| No, some high school | 0.4% | 0.6% | 1.4% | 1.1% | 3.1% | 4.3% | 0.7% | 0.7% |
| High school grad | 5.3% | 4.8% | 24.6% | 7.1% | 13.9% | 19.1% | 6.7% | 7.7% |
| Some college | 15.9% | 12.7% | 5.8% | 13.4% | 9.1% | 8.4% | 4.2% | 4.7% |
| Vocational/technical | 4.8% | 3.6% | 10.7% | 10.0% | 9.1% | 15.0% | 8.5% | 2.8% |
| 2-year degree | 9.8% | 8.8% | 9.9% | 7.7% | 4.2% | 6.2% | 13.7% | 14.4% |
| 4-year degree | 35.1% | 35.3% | 41.0% | 32.6% | 27.9% | 22.9% | 46.0% | 53.2% |
| Post grad degree | 28.7% | 34.2% | 6.5% | 28.1% | 32.8% | 24.1% | 20.2% | 16.5% |

U.S. West

- Seniors 55 years or over (38.6%) comprised the largest age group among U.S. West respondents in 2016, followed by middle age visitors between 35 and 54 years (20.9%) and young visitors under 35 years old.
- Another large group of travelers were families (25.2%). The came to get married/honeymoon segment accounted for only 3.8 percent of U.S. West respondents.
- Most U.S. West visitors have been to Hawai'i before (81%), the highest percentage of repeat visitors among the visitor groups.
- Many U.S. West respondents were affluent with 41.6 percent reporting household income between \$100,000 to \$199,999, and 18.1 percent with income over \$200,000 (see 2016 VSAT companion table, income).
- Two thirds of the respondents were employed while 23 percent were retirees.
- The majority of respondents were educated with college (44.9%) and post graduate (28.7%) degrees.
- There were more females (55.3%) than males (44.7%) among U.S. West respondents in 2016. The median age of the respondents was 51 years old.

- Most of the respondents (81.3%) had traveled on vacation more than 500 miles from home in the past three years.
- Nearly half (48.9%) of the respondents had friends or relatives in Hawai'i, 8.8 percent were previous Hawai'i residents, and 11.5 percent owned timeshares or other properties in the islands.
- The majority of U.S. West respondents traveled to the islands with their spouses (63.3%), 28.8 percent came with other adult family members, and 25.4 percent came with children under 18 years old. Additionally, 16.5 percent came with friends/business associates.

**Figure 29: 2016 More Visitor Profile by Market
(Percentage of Visitors by MMA 2016)**

| | Major Market Areas | | | | | | | |
|-------------------------------------|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Gender | | | | | | | | |
| Male | 44.7% | 46.9% | 50.5% | 46.8% | 53.8% | 39.3% | 43.2% | 45.7% |
| Female | 55.3% | 53.1% | 49.5% | 53.2% | 46.2% | 60.7% | 56.8% | 54.3% |
| Age (median years) | 51 | 51 | 51 | 50 | 50 | 46 | 52 | 43 |
| Traveled 500+ miles in past 3 years | | | | | | | | |
| Yes | 81.3% | 79.4% | 59.1% | 85.4% | 83.9% | 80.2% | 51.5% | 55.6% |
| No | 18.7% | 20.6% | 40.9% | 14.6% | 16.1% | 19.8% | 48.5% | 44.4% |
| Lived in Hawai'i | | | | | | | | |
| Yes | 8.8% | 4.9% | 1.4% | 1.5% | 1.6% | 0.7% | 6.0% | 1.8% |
| No | 91.2% | 95.1% | 98.6% | 98.5% | 98.4% | 99.3% | 94.0% | 98.2% |
| Friends/Relatives in Hawai'i | | | | | | | | |
| Yes | 48.9% | 37.7% | 16.1% | 19.8% | 16.3% | 9.2% | 9.1% | 10.5% |
| No | 51.1% | 62.3% | 83.9% | 80.2% | 83.7% | 90.8% | 90.9% | 89.5% |
| Own Property in Hawai'i | | | | | | | | |
| Yes, I own timeshare units | 8.8% | 6.3% | 12.2% | 6.3% | 1.3% | 1.0% | 1.0% | 0.4% |
| Yes, I own other types of property | 2.7% | 1.7% | 0.4% | 2.1% | 0.3% | 0.1% | 1.1% | 0.6% |
| No, but plan to in the future | 13.2% | 9.0% | 8.3% | 9.2% | 5.2% | 2.9% | 9.4% | 11.9% |
| No | 75.3% | 83.0% | 79.0% | 82.4% | 93.2% | 96.0% | 88.6% | 87.0% |
| Traveled to Hawai'i with... | | | | | | | | |
| Spouse | 63.3% | 62.9% | 65.0% | 69.7% | 55.5% | 67.5% | 47.6% | 65.0% |
| Other adult family member | 28.8% | 25.5% | 31.5% | 27.2% | 14.7% | 21.5% | 21.0% | 18.2% |
| Child/Grandchild under 18 | 25.4% | 18.1% | 17.7% | 23.2% | 12.8% | 22.4% | 15.0% | 11.6% |
| Friend/Associate | 16.5% | 17.6% | 17.4% | 18.6% | 15.3% | 16.0% | 21.5% | 13.8% |
| Myself- traveling alone | 10.7% | 11.5% | 4.9% | 6.6% | 13.8% | 7.0% | 13.9% | 4.5% |
| Boyfriend/Girlfriend | 6.4% | 5.7% | 2.5% | 6.7% | 11.5% | 4.7% | 4.1% | 3.5% |
| Same-sex partner | 0.6% | 0.8% | 0.2% | 0.6% | 0.6% | 1.1% | 1.8% | 0.3% |

U.S. East

- U.S. East respondents showed similar age distribution as their U.S. West counterparts. Senior (39.2%) was also the largest segment, followed by middle age (24.5%) and young (12.6%).
- Family groups comprised 17.9 percent of U.S. East respondents.
- Over half (58.5%) of U.S. East respondents were repeat visitors to Hawai'i.
- U.S. East visitors were similarly wealthy as their U.S. West counterpart, with 39.7 percent reporting household income between \$100,000 to \$199,999, and 20 percent with income over \$200,000 (see 2016 VSAT companion table, income).
- Seven out of ten respondents were employed while 22.5 percent were retirees.
- The majority of the respondents held college (44%) and post graduate (34.2%) degrees.
- Just over half of U.S. East respondents were female (53.1%) and 46.9 percent were male. The median age was 51 years old.

- The majority (79.4%) of U.S. East respondents had taken a trip of more than 500 miles from their homes in the past three years.
- Compared to their U.S. West counterparts, fewer U.S. East respondents previously lived in Hawai'i (4.9%), have friends and relatives who live in Hawai'i (37.7%) or own property in Hawai'i (8%).
- In 2016, the majority of U.S. East respondents came with their spouses (62.9%). Some came with other adult family members (25.5%), children (18.1%) and friends/business associates (17.6%).

Japan

- In 2016, 38.1 percent of Japanese respondents were seniors, 19.5 percent were middle age, and 11.4 percent were in the young segment.
- Many Japanese respondents traveled in family groups (16.9%) or came to get married/honeymoon (14%).
- Six out of ten Japanese respondents (61.8%) were repeat visitors to the islands.
- Half of the Japanese respondents were employed (50.2%) and 14 percent were retirees. There continued to be more homemakers (15.3%) compared to the other visitor markets.
- Japanese respondents in 2016 were wealthy, with 18.3 percent reporting household income between 750 to 1000 yen, and 22.6 percent with income of 1,000 yen or more (see 2016 VSAT companion table, income).
- There were more high school graduates (24.6%) among Japanese respondents than the other visitor group. Five out of ten Japanese respondents had a college degree and a small percentage held post-graduate degrees (6.5%).
- Slightly more males (50.5%) than females (49.5%) responded to the survey in 2016. The median age was 50 years old.
- Over half of Japanese respondents have taken a trip of more than 500 miles in the past three years.
- Very few respondents lived in Hawai'i previously (1.4%), but 16.1 percent have friends and/or relatives living in Hawai'i in 2016.
- A higher percentage of Japanese respondents owned timeshare properties (12.2%) in Hawai'i compared to respondents from other markets.
- Two out of three (65%) respondents came with their spouses, 31.5 percent came with adult family members, 17.7 percent were with children, and 17.4 percent were with friends/business associates.

Canada

- Age distribution among Canadian respondents in 2016, showed seniors (36.6%) as the largest group, followed by middle age (23%) and young (12.8%).
- A quarter of the respondents came with families (22.8%).
- Two third of Canadian respondents were repeat visitors (65.9%) to the islands.
- Similar to U.S. visitors, 70.3 percent of Canadian respondents were employed and 23.5 percent were retirees.

- Like U.S. East visitors, 37.9 percent of Canadian respondents reported income levels between \$100,000 and \$199,999 while 13.7 percent reported income of \$200,000 or more (see 2016 VSAT companion table, income).
- Four out of ten respondents had college degrees, 28.1 percent had postgraduate degrees and 7.1 percent were high school graduates.
- There were more females (53.2%) than males (46.8%) among Canadian visitors surveyed in 2016. The median age was 50 years old.
- Most respondents (85.4%) had taken a trip of more than 500 miles in the past three years.
- Only 1.5 percent had lived in Hawai'i before, but 19.8 percent have friends and/or relatives who live in the islands. Some own timeshare units (6.3%) or other types of property (2.1%) in Hawai'i.
- Seven out of ten respondents came with their spouses, 27.2 percent came with adult family members, 23.2 percent came with children, and 18.6 percent traveled with friends/business associates.

Europe

- Middle Age (30.9%) were the largest group among European respondents in 2016, followed by seniors (25.7%).
- Those who came to get married/honeymoon comprised 13.8 percent, while 12.4 percent of the respondents came with families.
- The majority of European respondents (70.8%) were first-time visitors.
- Three out of four respondents were employed (78.4%), while 13.1 percent were retired.
- A quarter of the respondents (28.3%) reported income levels between \$100,000 and \$199,999 and 9.7 percent had income of \$200,000 or more (see 2016 VSAT companion table, income).
- Three out of ten European respondents were college graduates (32%) and another 32.8 percent had postgraduate degrees.
- In 2016, over half (53.8%) of the European respondents were male and 46.2 percent were female. The median age was 46 years old.
- Most respondents (83.9%) had taken a trip of more than 500 miles in the past three years.
- Only 1.6 percent of the respondents lived in Hawai'i, but 16.3 percent have friends and relatives in Hawai'i.
- Over half (55.5%) of the respondents came with their spouses, 15.3 were with friends/business associates, 14.7 percent were with other adult family members, 12.8 percent were with children, and 11.5 percent were with boyfriends/girlfriends.

Oceania

- Seniors (42.9%) comprised the largest group of respondents from Oceania, followed by Middle Age (20.8%).
- A quarter of Oceania respondents came with family groups (22.3%).
- Over half of Oceania respondents (53.2%) were first-time visitors.
- Seven out of ten respondents were employed while 20.8 percent were retired.

- Close to 36 percent of Oceania respondents reported income levels between \$100,000 and \$199,999, while 11.6 percent reported income of \$200,000 or more (see 2016 VSAT companion table, income).
- Three out of ten European respondents were college graduates (29.1%) and another 24.1 percent had postgraduate degrees.
- Among survey respondents from Oceania, 60.7 percent were female and 39.3 percent were male. The median age was 52 years old.
- Most (80.2%) respondents had taken a trip of more than 500 miles in the past three years.
- Less than 1 percent of the respondents have lived in Hawai'i before, and 9.2 percent have friends and relatives who resided in the islands.
- Two out three respondents came with their spouses, 21.5 percent were with adult family members, 22.4 percent traveled with children, and 16 percent came with friends/business associates.

China

- Age distribution among Chinese respondents in 2016 showed middle age (26.4%) as the largest group, followed by senior (21.1%) and young (18.7%).
- A quarter of the respondents traveled with families (21.4%) while 12.5 percent came to get married/honeymoon.
- Eight out of ten Chinese respondents (81.6%) were first-time visitors to Hawai'i.
- Over half of the respondents were employed (58.8%) and 25.7 percent were retirees.
- The majority of Chinese respondents (84.9%) reported household income between 65,733 to 197,203 CNY (see 2016 VSAT companion table, income).
- Six out of ten respondents had college degrees and 20.2 percent held post-graduate degrees.
- There were more females (56.8%) than males (43.2%) among Chinese respondents in 2016. The median age was 43 years old.
- Over half (51.5%) of the respondents have taken a trip of more than 500 miles in the past three years.
- Some respondents previously lived in Hawai'i (6%), while 9.1 percent have friends and/or relatives living in the islands.
- About 2 percent of the respondents owned timeshares or other properties in Hawai'i.
- Less than half (47.6%) of the respondents came with their spouses, 21.5 percent were with friends/business associates, 21 percent came with adult family members and 15 percent were with children.

Korea

- Age distribution among Korean respondents in 2016, showed a higher percentage of young visitors (25.1%) compared to middle age (17.4%) and senior (2.7%) visitors.
- There were significantly more visitors who came to get married/honeymoon (44.9%) among Korean respondents compared to other visitor groups.
- The majority of Korean respondents (80.9%) were first-time visitors.
- Two thirds of the respondents were employed (65.6%), while only 1.8 percent were retired.

- Korean respondents were affluent. A third of the respondents (34.9%) reported household between 47,595,376 KRW to 89,902,375 KRW, and 12.6 had income above 89,902,375 KRW (see 2016 VSAT companion table, income).
- The majority of the respondents were college graduates (67.6%) and another 16.5 percent had postgraduate degrees.
- Among survey Korean respondents in 2016, 54.3 percent were female and 45.7 percent were male. The median age was young at 35 years old.
- Over half (55.6%) of the respondents have taken a trip of more than 500 miles in the past three years.
- Only 1.8 percent had lived in Hawai'i before, while 10.5 percent have friends and/or relatives in the islands.
- Two out of three (65%) respondents came with their spouses, 18.2 percent came with adult family members, 13.8 percent were with friends/business associates and 11.6 percent were with children.

Primary Purpose of Trip

The VSAT survey inquired visitors about the primary purpose of their trip Hawai'i and respondents could only select one reason from the list shown in Table 30.

**Figure 30: Primary Purpose of Trip All Visitors
(Percentage of Visitors by MMA, 2016)**

| | Major Market Areas | | | | | | | |
|---|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Primary Purpose of Trip | | | | | | | | |
| Vacation | 60.6% | 56.1% | 64.5% | 74.6% | 65.2% | 81.7% | 76.3% | 44.0% |
| Visit friends/relatives | 8.9% | 9.9% | 1.7% | 3.8% | 4.4% | 1.5% | 1.9% | 2.3% |
| Anniversary/birthday | 8.6% | 9.3% | 2.0% | 5.8% | 6.4% | 4.4% | 0.8% | 2.2% |
| Attend a business meeting or conduct business | 4.2% | 5.1% | 1.4% | 1.5% | 1.8% | 0.5% | 2.0% | 1.9% |
| Attend/participate in a wedding | 2.8% | 3.1% | 9.4% | 2.5% | 1.2% | 1.0% | 1.1% | 1.4% |
| Honeymoon | 2.2% | 3.8% | 9.6% | 3.3% | 10.1% | 3.1% | 4.2% | 32.3% |
| Get married/vow renewal | 0.7% | 0.9% | 2.1% | 0.5% | 1.6% | 0.1% | 0.1% | 6.7% |
| Convention, conference, seminar | 2.3% | 2.8% | 0.8% | 1.7% | 2.5% | 0.3% | 3.3% | 0.8% |
| Family gathering/reunion | 2.4% | 1.5% | 1.4% | 1.9% | 0.4% | 0.9% | 1.0% | 1.0% |
| Sports event | 1.6% | 0.8% | 1.8% | 1.1% | 1.6% | 0.3% | 0.4% | 0.0% |
| Incentive/reward | 1.0% | 1.5% | 1.5% | 1.2% | 2.5% | 0.3% | 1.9% | 4.7% |
| Attend/participate in a cultural/historical/music event | 0.6% | 1.4% | 0.5% | 0.2% | 0.3% | 0.1% | 0.6% | 0.1% |
| Shopping/fashion | 0.1% | 0.1% | 1.3% | 0.1% | 0.1% | 0.6% | 1.7% | 1.3% |
| Other | 3.1% | 2.9% | 1.5% | 1.2% | 1.1% | 4.9% | 1.9% | 1.0% |

- **U.S. West and U.S. East:** Six out of ten U.S. West and U.S. East respondents in 2016 listed vacation as the primary reason for coming to the islands. More U.S. West and U.S. East visitors came to be with their families (visit friends/relatives, family gatherings/reunions) compared to other visitor groups. Other primary purpose of trip was to celebrate an anniversary/birthday or attend business meetings/conduct business.
- **Japan:** Vacation was the primary purpose for coming to Hawai'i among 64.5 percent of Japanese respondents. Nearly 10 percent of Japanese respondents came to honeymoon and 9.4 percent came to attend/participate in a wedding.

- **Canada:** Three out of four Canadian respondents listed vacation was their primary purpose of trip to Hawai'i. A few respondents came to celebrate an anniversary/birthday (5.8%) or visited friends/relatives (3.8%).
- **Europe:** Vacation was also the primary reason for 65.2 percent of European respondents. About 10 percent came to honeymoon and 6.4 percent came to celebrate an anniversary/birthday.
- **Oceania:** Most respondents from Oceania listed vacation as their primary purpose of trip while a few came to celebrate an anniversary/birthday (4.4%) or to honeymoon (3.1%).
- **China:** Three out of four Chinese respondents listed vacation as their primary purpose of trip. A few respondents came to honeymoon (4.2%) or to attend convention/conference/seminar (3.3%).
- **Korea:** Vacation was the primary purpose for visiting Hawai'i among 44 percent of Korean respondents. More Korean respondents came to honeymoon (32.3%) or to get married/vow renewal (6.7%) compared to the other visitor groups.

Secondary Purposes of Trip

The VSAT survey also inquired about visitors' secondary purpose of trip while in Hawai'i and multiple responses were allowed. Results are shown below.

**Figure 31: Secondary Purpose of Trip All Visitors
(Percentage of Visitors by MMA, 2016)**

| | Major Market Areas | | | | | | | |
|---|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Secondary Purpose(s) of Trip | | | | | | | | |
| Visit friends/relatives | 20.0% | 19.1% | 5.4% | 10.8% | 10.6% | 4.9% | 7.5% | 4.6% |
| Anniversary/birthday | 18.0% | 19.0% | 7.5% | 15.2% | 15.6% | 13.9% | 4.7% | 8.6% |
| Family Gathering/reunion/funeral | 8.3% | 5.5% | 5.5% | 7.0% | 2.0% | 3.0% | 5.5% | 5.5% |
| Attend a business meeting or conduct business | 5.8% | 6.5% | 2.6% | 2.4% | 2.7% | 0.9% | 4.6% | 3.5% |
| Honeymoon | 3.0% | 5.0% | 11.5% | 4.0% | 12.1% | 3.5% | 8.3% | 38.2% |
| Attend a convention, conference or seminar | 3.2% | 4.0% | 1.8% | 2.5% | 3.6% | 1.0% | 4.6% | 2.8% |
| Incentive/reward | 2.7% | 3.3% | 2.3% | 3.0% | 3.7% | 1.2% | 4.1% | 11.0% |
| Attend/participate in a wedding | 3.1% | 3.4% | 10.1% | 3.0% | 1.5% | 1.4% | 1.3% | 1.6% |
| Shopping/fashion | 2.7% | 1.6% | 32.8% | 3.1% | 4.0% | 17.3% | 20.7% | 28.3% |
| Attend/participate in a sporting event | 2.5% | 1.7% | 3.3% | 1.8% | 2.6% | 0.5% | 0.7% | 0.8% |
| Attend/participate in a cultural/historical/music event | 1.9% | 2.6% | 1.9% | 1.2% | 2.2% | 1.6% | 0.8% | 1.9% |
| Real estate purchase or viewing | 3.2% | 2.8% | 2.0% | 1.5% | 0.9% | 0.3% | 3.3% | 0.6% |
| Get married/vow renewal | 1.0% | 1.2% | 3.2% | 0.9% | 2.7% | 0.5% | 0.8% | 20.8% |
| Other | 5.8% | 4.9% | 3.3% | 4.7% | 4.8% | 12.6% | 2.5% | 1.6% |

- For U.S. West and U.S. East respondents, visiting friends and relatives, celebrating an anniversary/birthday, attending a family gathering/reunion/funeral, and attending a business meeting/conduct business were mentioned as secondary purpose of trip.
- Among Japanese respondents, shopping/fashion was the prevailing secondary purpose of trip (32.8%), followed by honeymoon (11.5%) and attend/participate in a wedding (10.1%).
- For Canadian respondents, celebrating an anniversary/birthday (15.2%) and visiting friends and relatives (10.8%) were the two most cited secondary purpose of trip.

- Among European respondents, to celebrate an anniversary/birthday (15.6%), to honeymoon (12.1%) and to visit friends/relatives (10.6%) were the most cited secondary purpose of trip.
- For Oceania respondents, shopping/fashion (17.3%) was the prevailing secondary purpose of trip, followed by celebrating an anniversary/birthday (13.9%).
- Among Chinese respondents, shopping/fashion was the predominant secondary purpose of trip (20.7%), followed by honeymoon (8.3%) and visit friends/relatives (7.5%).
- Honeymoon (38.2%) was the prevailing secondary purpose of trip among Korean respondents in 2016, followed by shopping/fashion (28.3%) and get married/vow renewal (20.8%).

ONE DETAIL THAT MADE TRIP TO HAWAI‘I EXCELLENT

At the end of the VSAT survey there were two open-ended questions intended to provide respondents with the opportunity to offer their own subjective opinion of their trip to Hawai‘i. The first question asked for the one detail that made their trip to Hawai‘i excellent. Responses are provided in Figure 32.

Figure 32: One Detail that Made Trip to Hawai‘i Excellent

| | Major Market Areas | | | | | |
|--|--------------------|-----------|-------|--------|--------|---------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania |
| Events/celebrations with friends/family | 35.0% | 32.2% | 10.1% | 14.6% | 11.5% | 5.2% |
| Overall, non-specific positive evaluations | 13.9% | 23.5% | 9.3% | 27.7% | 34.3% | 28.9% |
| Activities/attractions | 13.0% | 6.6% | 17.5% | 12.1% | 10.8% | 9.1% |
| Nature/natural beauty, scenery | 11.3% | 10.1% | 7.6% | 10.7% | 16.1% | 10.3% |
| Beach/ocean | 7.3% | 3.6% | 0.8% | 10.9% | 5.3% | 3.9% |
| Friendly, warm people/customer service/hospitality | 3.9% | 3.6% | 13.6% | 8.2% | 3.2% | 3.9% |
| Local culture/food/music | 3.4% | 1.5% | 6.1% | 3.8% | 0.0% | 3.9% |
| Events (observed or participated) | 2.8% | 4.3% | 6.3% | 4.4% | 4.1% | 1.7% |
| Location | 2.3% | 3.6% | 7.0% | 3.1% | 3.3% | 3.9% |
| Packaged tour or activity | 1.6% | 1.4% | 3.4% | 8.2% | 6.5% | 4.3% |
| Accommodations | 1.1% | 0.7% | 7.6% | 1.2% | 1.1% | 3.4% |
| Military historical sites | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Relaxation/good atmosphere | 0.6% | 1.5% | 6.3% | 4.6% | 1.0% | 5.2% |
| Weather | 0.6% | 0.0% | 3.7% | 3.8% | 1.1% | 0.0% |
| Japanese language spoken/understood | 0.0% | 0.0% | 3.8% | 0.0% | 0.0% | 0.0% |
| Safe/secure | 0.0% | 0.7% | 1.6% | 3.3% | 0.0% | 2.2% |
| Fresh air | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% |
| Public transportation | 0.0% | 0.0% | 2.3% | 0.6% | 0.0% | 2.2% |
| Cleanliness | 0.0% | 1.5% | 0.0% | 0.6% | 0.0% | 4.3% |

Note: Sample size for China and Korea were too limited to report

- **U.S. West:** For this group of visitors, the events/celebrations with friends/family was the most mentioned detail that made their trip to Hawai‘i excellent. Some respondents gave a positive evaluation to their overall experience in Hawai‘i but gave no specifics, while others cited the activities attractions and Hawai‘i’s natural beauty and beaches/ocean.

- **U.S. East:** A third of U.S. East respondents said the one detail that made their Hawai'i trip memorable was the events/celebrations with friends/family. A quarter of the respondents gave positive evaluation to their Hawai'i trip overall, while some mentioned Hawai'i's natural beauty and activities/attractions.
- **Japan:** Among Japanese respondents, the top two details that made their trip excellent were the activities/attractions and the friendly hospitality/customer service. Some mentioned the events/celebrations with friends/family, Hawai'i's natural beauty and local culture/food/music. A few respondents appreciated that Japanese was spoken and they were understood.
- **Canada:** A quarter of the Canadian respondents gave positive evaluation to their Hawai'i trip overall with no details. Others cited the events/celebrations with friends/family, the activities attractions, Hawai'i's natural beauty and beaches/ocean.
- **Europe:** A third of the European respondents said that their Hawai'i trip was excellent overall. Some respondents mentioned Hawai'i's natural beauty, the activities/attractions and the events/celebrations with friends/family.
- **Oceania:** A quarter of the respondents from Oceania said that overall their Hawai'i trip was excellent. Hawai'i's natural beauty and the activities/attractions were also features that enhanced their trip.

ONE EXPERIENCE THAT POSED A NEGATIVE IMPACT

The second open-ended question asked visitors for one detail that posed a negative impact to their stay in Hawai'i. Respond rates to this question were fairly low among the visitors survey: U.S. West (8%), U.S. East (7%), Japan (12%), Canada (9%), Europe (6%), Oceania (8%), China (3%) and Korea (3%). Most survey participant did not complete this question.

- **U.S. West:** For this group of respondents, 9.5 percent were negative impacted by nuisances (including dirty/unavailable public restrooms, litter, bugs, animals noise). About 8 percent of the respondents felt better accommodations (including cost, location, service, pests, amenities) would have improved their trip to Hawai'i. Others encountered travel problems (costs, airport, airline, TSA/customs, cruise), unfriendly people/poor service (6.4%) or bad weather (6.1%).
- **U.S. East:** Among this group of respondents, travel problems (12.1%) was their main issue, followed by nuisances (10.1%) and unfriendly people/poor service (7.9%).
- **Japan:** For this group of respondents, issues with accommodations (10.9%), travel problems (9.4%), unfriendly people/poor service (8.7%) and nuisances (8.4%) were the most reported experiences that was negative about their Hawai'i trip.
- **Canada:** The high cost was the main issue for Canadian respondents (21.4%). Some also experienced nuisances (10.6%) and travel problems (7.5%).
- **Europe:** For this group, travel problems (10.3%) and commercialization/crowds (9.8%) were the top two negative things about their trip to Hawai'i. Some also encountered nuisances (8.6%) and had issues with the accommodations (8.5%).
- **Oceania:** Among this group of respondents, travel problems (14.1%), the high cost (10.8%), issues with accommodations (9.9%) and unfriendly people/poor service (9.4%) were things that negatively impacted their Hawai'i trip.

Figure 33: Give One Experience that Posed a Negative Impact to your Stay in Hawai'i

| | Major Market Areas | | | | | | | |
|--|--------------------|-----------|-------|--------|--------|---------|-------|-------|
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
| Nuisances (dirty or unavailable public restrooms, litter, bugs, animals noise) | 9.5% | 10.1% | 8.4% | 10.6% | 8.6% | 7.4% | 9.2% | 8.2% |
| Accommodations (cost, location, service, pests, amenities, not as advertised) | 7.5% | 5.4% | 10.9% | 4.3% | 8.5% | 9.9% | 0.0% | 4.1% |
| Travel problems (cost, airport, airline, TSA/ customs, cruise) | 6.9% | 12.1% | 9.4% | 7.5% | 10.3% | 14.1% | 4.0% | 8.2% |
| Unfriendly/poor service/felt unwelcome | 6.4% | 7.9% | 8.7% | 1.7% | 6.6% | 9.4% | 17.1% | 4.1% |
| Weather | 6.1% | 4.8% | 2.3% | 3.8% | 5.8% | 0.6% | 4.0% | 0.0% |
| Disappointing experience | 5.4% | 5.0% | 6.3% | 6.4% | 5.9% | 6.7% | 0.0% | 0.0% |
| Commercialization/urbanization/crowds/loss of local culture | 5.2% | 4.7% | 4.0% | 3.5% | 9.8% | 5.5% | 0.0% | 0.0% |
| Parking (not enough/parking fees) | 4.4% | 4.0% | 0.8% | 3.1% | 2.5% | 0.6% | 0.0% | 9.5% |
| Driving (signage, road surface, traffic violations, bad drivers) | 4.2% | 5.0% | 1.6% | 3.1% | 0.0% | 1.4% | 4.0% | 4.1% |
| Dengue/Zika/health concerns | 3.6% | 1.0% | | 2.4% | 1.3% | 0.0% | 0.0% | 0.0% |
| Crime/safety/problems with law enforcement | 3.6% | 2.6% | 4.0% | 2.9% | 2.6% | 2.2% | 7.9% | 0.0% |
| Food/restaurants (cost, accessibility, options, quality) | 3.2% | 3.0% | 6.3% | 3.4% | 0.7% | 5.3% | 7.9% | 8.2% |
| Traffic (congested/slow) | 3.0% | 2.0% | 0.2% | 1.4% | 1.2% | 0.0% | 4.0% | 0.0% |
| Illness or injury | 2.4% | 2.0% | 2.3% | 1.8% | 2.0% | 3.3% | 0.0% | 0.0% |
| Travel companion issues (Wish family could have come/travel alone/annoyed with travel partner) | 2.4% | 2.0% | 0.6% | 0.9% | 0.0% | 0.8% | 0.0% | 0.0% |
| Solicitors (esp. timeshare and street solicitors in Waikiki) | 2.1% | 1.7% | 2.5% | 1.7% | 0.7% | 1.4% | 0.0% | 0.0% |
| Cost/expensive (non-specific) | 2.1% | 4.7% | 7.2% | 21.4% | 4.0% | 10.8% | 7.9% | 12.3% |
| Ground transportation (cost, availability, trolleys, buses, taxis, shuttles) | 1.8% | 0.7% | 6.4% | 2.0% | 6.5% | 6.7% | 0.0% | 0.0% |
| Homelessness | 1.8% | 2.9% | 1.5% | 2.6% | 0.7% | 0.6% | 0.0% | 0.0% |
| Longer stay on/visiting neighbor islands | 1.5% | 2.0% | 0.8% | 1.4% | 0.0% | 0.8% | 0.0% | 0.0% |
| Issues with other tourists | 1.5% | 2.6% | 5.8% | 1.2% | 1.3% | 2.2% | 0.0% | 0.0% |
| Smoking (discrimination of smokers, annoyed by smokers) | 1.5% | 0.6% | 2.2% | 0.6% | 2.6% | 1.4% | 4.0% | 4.1% |
| Rental car (cost, service, vehicle or reservation problems/parking availability, cost) | 1.2% | 1.4% | 1.6% | 3.2% | 1.9% | 0.6% | 0.0% | 8.2% |
| Better planning/more information (signage, maps, research) | 1.2% | 1.0% | 0.9% | 0.9% | 1.9% | 0.0% | 4.0% | 0.0% |
| Sea/wildlife (Whales, Dolphins, sea turtles, fish, birds, etc.) | 0.6% | 1.0% | 0.4% | 0.9% | 2.0% | 0.0% | 0.0% | 0.0% |
| Cellphone/WIFI service/Internet access | 0.3% | 0.6% | 1.2% | 0.6% | 0.0% | 1.3% | 11.9% | 8.2% |
| tour guide/travel package | 0.3% | 1.0% | 2.1% | 0.6% | 0.7% | 1.6% | 5.2% | 0.0% |
| Nightlife (clubs, festivals, and other nighttime activities & establishments) | 0.3% | 1.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% |
| Language (Issues/concerns) | 0.0% | 0.0% | 3.1% | 0.3% | 0.0% | 0.0% | 4.0% | 4.1% |
| Access and activities for elderly and handicap | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

- **China:** The main issue for this group of respondents was encountering unfriendly people/poor service (17.1%). Others mentioned the lack of cell phone/Internet access/WIFI service (11.9%) and nuisances (9.2%).
- **Korea:** Among Korean respondents, the high costs (12.3%) and parking problems (9.5%) were the top two negative things encountered during their trip to Hawai'i. A similar percentage of respondents encountered travel problems (8.2%), nuisances (8.2%), issues with food/restaurants (8.2%), issues with rental cars (8.2%) and lack of cellphone/WIFI service (8.2%).

SURVEY METHODOLOGY

The 2016 VSAT survey instrument was produced in English, Japanese, Chinese and Korean. The survey contained seven pages and 31 questions inquiring about a broad range of trip-related topics including satisfaction with the trip, intention to return to Hawai'i, sources of information consulted during trip planning, activities done on each island, any negative events that occurred during the trip, and questions regarding demographic profile of the survey respondents.

The objective of the survey was to collect, process, and report satisfaction and activity data from a representative sample of domestic and international visitors. In 2016, the minimum requirement was 16,800 completed surveys from U.S. West, U.S. East, Japan, Canada, Europe and Oceania (Australia/New Zealand), China and Korea.

Respondents were randomly selected from within specified subgroups of the total population of possible respondents. The population was all visitor parties who departed by air in the calendar year 2016. The sampling frame, that is the segment of the population from which respondents were sampled, were all visitor parties who completed a Domestic In-Flight survey (which appears on the reverse side of the Department of Agriculture's (DOA) plant and animal declaration form), an International Departure survey, or an Island Survey and who had a departure date between January 1, 2016 and December 31, 2016.

Parties were randomly selected from within strata, or subgroups, in the population. Strata included major market area (MMA), month of departure, visitor status (first-time vs. repeat), and islands visited. The design was intended to produce a disproportionate stratified sample of our visitors with a margin of error of plus minus less than one percentage point at the 95 percent confidence level.

For visitors who provided addresses, survey forms were mailed to a randomly selected sample from U.S. West, U.S. East, Japan, Canada, Europe, and Oceania after they returned from their trip to Hawai'i. Respondents could complete the survey and mail them back, or they were provided with a link and password to complete the survey online. For those who provided e-mail addresses, they were sent an e-mail invitations with the link and password to the survey.

Because past experiences have shown that Chinese and Korean visitors were not responsive to the mail and online survey methods, beginning in January 2016, VSAT data from Chinese and Korean visitors were collected via airport intercept surveys. The surveys were conducted in the holding areas at departing gates of airlines flying to China and Korea from the Daniel K. Inouye International Airport. The surveys were self-administered and done on iPads written in their native languages.

Figure 34: Response Rates and Sample Statistics, VSAT 2016

| MMA | Arrivals | | Completed Surveys | Sample | Response | Sample |
|--------------|------------------|-------------|-------------------|--------------|---------------|-------------|
| | Number | Pct. | Returned | Fraction | Rate | Error |
| U.S. West | 3,658,380 | 43.14% | 4,261 | 0.12% | 17.07% | 1.50 |
| U.S. East | 1,869,826 | 22.05% | 4,113 | 0.22% | 16.57% | 1.53 |
| Japan | 1,488,396 | 17.55% | 3,803 | 0.25% | 24.43% | 1.59 |
| Canada | 478,870 | 5.65% | 3,997 | 0.78% | 21.88% | 1.55 |
| Europe | 142,684 | 1.68% | 2,455 | 1.69% | 14.16% | 1.98 |
| Oceania | 399,644 | 4.71% | 1,813 | 0.45% | 18.02% | 2.30 |
| China/Korea | 443,294 | 5.23% | 2,060 | 0.56% | 48.80% | 2.16 |
| Total | 8,481,094 | 100% | 22,502 | 0.27% | 19.53% | 0.65 |

The overall survey response rate for 2016 was 19.53 percent. That produced a sample error estimate of plus-or-minus 0.65 percentage points at the 95 percent confidence level.

APPENDIX

ENGLISH LANGUAGE VSAT SURVEY FORM, 2016



Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaiiauthority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

Name
Address
City, State Zipcode

Aloha!

We sincerely hope you enjoyed your recent trip to Hawai'i.

During your visit you were kind enough to complete the Hawai'i Tourism Authority visitor questionnaire. Your name was randomly selected from over a million completed forms to participate in this Visitor Satisfaction survey.

In Hawai'i, we do our best to ensure each visitor's stay is as enjoyable as possible. We would very much appreciate your candid answers to the enclosed questionnaire on how well we took care of you. Your responses will help us improve the Hawai'i experience for all visitors.

We assure you that your responses will be kept completely confidential and will be used for research purposes only. We will not release your name to any individual or organization for any reason. The answers you provide will be compiled without any identifying information and released only in aggregate form. It would be impossible to associate a response to an individual name or address.

We have contracted with QMark Research to conduct this survey on our behalf. Please return your completed questionnaire directly to them in the enclosed postage paid envelope. This survey is also available on the Internet. If you have Internet access, we recommend you fill out the survey on the web. The web address is:

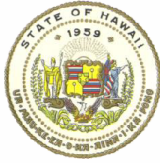
www.hawaiiauthority.org/survey2016

The password to access the survey is the 6-digit number on the bottom right corner of the front page of the survey.

If you have any questions regarding this survey, please contact QMark Research toll free at (855) 524-7744, or by e-mail to QMSurvey@anthologygroup.com. We appreciate your visit to our islands and thank you very much for your time.

Sincerely,

George D. Szigeti
Chief Executive Officer



2016 VISITOR SATISFACTION SURVEY

If you have internet access at a computer or mobile device, you may also fill this survey on the web at:
www.hawaii tourism authority.org/survey2016
 Your password is the 6 digit number on the label in the bottom right corner of this page.

Aloha! Please answer each question candidly, thinking of your most recent trip to Hawai'i. We need your feedback to evaluate how well we take care of those who visit our islands. Your answers will help us improve the Hawai'i experience for all visitors. Your responses will be kept completely confidential; answers from all respondents will be tallied as totals, not individual responses. Mahalo.

Instructions: Please answer each question by marking the circle [●] or writing in the space provided with a black pen or dark lead pencil. Return the completed survey in the postage-paid envelope as soon as possible.

| MARKING INSTRUCTIONS | |
|------------------------------------|--------------------------------------|
| CORRECT MARKS: ● ● ● ● ● | INCORRECT MARKS: ⊗ ⊘ ⊖ ⊕ ○ |

1. How would you rate your most recent trip to Hawai'i?

| | Excellent | Above Average | Below Average | Poor | Did not Visit |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Hawai'i (The state) Overall | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| How would you rate your experience on ? | | | | | |
| Island of O'ahu (Waikiki/Honolulu) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Maui | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Moloka'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Lana'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Hilo) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Kona) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Kaua'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2. Based on your most recent trip to Hawai'i, how would you rate Hawai'i on...

| | Excellent | Above Average | Below Average | Poor |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Offering a variety of experiences | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The number of different/ unique experiences | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Being a safe and secure destination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

3. Would you say this trip to Hawai'i ... ?

- Exceeded your expectations
- Met your expectations
- Did not meet your expectations

4. How likely are you to recommend Hawai'i as a vacation place to your friends and relatives?

- Very Likely
- Somewhat Likely
- Not too likely
- Not at all likely

5a. How likely are you to return to visit Hawai'i in the next five years?

- Very Likely ----- **SKIP TO Q6**
- Somewhat Likely ----- **SKIP TO Q6**
- Not too likely ----- **CONTINUE**
- Not at all likely ----- **CONTINUE**

5b. Why would you be unlikely to revisit Hawai'i? (Mark all that apply)

- Flight too long
- Too commercial/overdeveloped
- Too crowded/congested/traffic
- Not enough value for the price
- Want to go someplace new
- Other financial obligations
- Poor service
- Unfriendly people/felt unwelcome
- Poor health/age restriction
- Five years is too soon to revisit
- Too expensive
- Other (Specify) _____

6. If you came to Hawai'i on vacation, would you describe your most recent trip to Hawai'i as: (Select only one)

- A once in a lifetime trip
- A special occasion
- More special than most trips we take
- A regular annual or semi-annual trip
- Other

7. On this trip, who was in your travel party? (Mark all that apply)

- My spouse
- My child(ren)/grandchild(ren) under 18
- Other adult members of my family
- My friends/associates
- My girlfriend/boyfriend
- Myself (I have traveled alone)

8. Of the people who traveled with you on this trip, how many are:

| | # Males | # Females |
|---------------------|---------|-----------|
| 12 years or younger | | |
| 13 to 17 years | | |
| 18 to 24 years | | |
| 25 to 40 years | | |
| 41 to 59 years | | |
| 60 or more | | |
| TOTAL | | |

9a. What was the primary purpose of your most recent trip to Hawai'i?

9b. What, if any, was the secondary purpose of your most recent visit?

| | Q9a. Primary Purpose (one answer) | Q9b. Secondary Purpose(s) |
|---|--------------------------------------|------------------------------|
| Vacation | <input type="radio"/> | <input type="radio"/> |
| Attend a business meeting or conduct business | <input type="radio"/> | <input type="radio"/> |
| Attend a convention, conference or seminar | <input type="radio"/> | <input type="radio"/> |
| Incentive / reward | <input type="radio"/> | <input type="radio"/> |
| Visit friends or relatives | <input type="radio"/> | <input type="radio"/> |
| Get married/ vow renewal | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a wedding | <input type="radio"/> | <input type="radio"/> |
| Honeymoon | <input type="radio"/> | <input type="radio"/> |
| Anniversary / birthday | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a cultural / historical / musical event | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a sporting event | <input type="radio"/> | <input type="radio"/> |
| Medical treatment | <input type="radio"/> | <input type="radio"/> |
| Shopping / fashion | <input type="radio"/> | <input type="radio"/> |
| Education / visit schools | <input type="radio"/> | <input type="radio"/> |
| Family Gathering / Reunion | <input type="radio"/> | <input type="radio"/> |
| Real estate purchase or viewing | <input type="radio"/> | <input type="radio"/> |
| Other (specify) _____ | <input type="radio"/> | <input type="radio"/> |

10. For each place you visited on your most recent trip, which of the following did you see or do?

| | O'ahu | Maui | Kaua'i | Hawai'i Island (Hilo) | Hawai'i Island (Kona) | Moloka'i | Lana'i |
|------------------------------|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Sightseeing | On own (self-guided) / Driving around island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Helicopter ride or airplane tour | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Boat Tour/submarine ride/whale watching | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Visiting communities - i.e. Chinatown, Haleiwa | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Private limousine/van tour/tour bus | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Scenic views / natural landmarks | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Movie and television filming location tours | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recreation | Beach/sunbathing/ | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Surfing/bodyboarding/paddleboarding | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Canoeing/kayaking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Swimming in the ocean/snorkeling | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Windsurfing/kitesurfing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Jet skiing/parasailing/scuba diving | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Fishing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Golf | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Running/jogging/fitness walking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Spa | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Backpacking/hiking/camping | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Agritourism – i.e. farms, ranches | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Sports event or tournament | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | State parks / botanical gardens | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Entertainment & Dining | Lunch/sunset/dinner/evening cruise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Live music / stage show | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Nightclub/dancing/bar/karaoke | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Fine dining | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Family restaurant | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Fast Food | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Café/coffee house | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Ethnic dining | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Prepared own meals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Shopping | Malls / department stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Designer boutiques | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Hotel stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Swap meet or flea market | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Discount/outlet stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Supermarkets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Farmer's market | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Convenience stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Duty free stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Local shops and artisans | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| History, Culture & Fine Arts | Historic military site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Other historic site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Museum/art gallery | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Luau | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Polynesian show/hula show | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Lessons such as hula or canoeing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Ukulele lessons | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Play/concert/theatre | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Art/craft fair | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Festival (specify) _____ | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Transportation | Airport shuttle | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Trolley | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Public bus | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Tour bus / Tour van | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Taxi / Limousine | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | Rental car | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

11. Thinking back on your most recent trip to Hawai'i, when did you make the following decisions?

11a. Mark if you made your decision during your trip.

11b. Mark if you made your decision before your trip.

If you made travel decisions during and before your trip, please fill in both circles.

11c. If 11b is marked, please estimate the number of months in advance that you made your decision.

Enter "0" if you made your decision less than one month before the trip began.

| | 11a. During Trip | 11b. Before Trip | 11c. # MONTHS |
|---|-----------------------|-----------------------|---------------|
| Decision to take vacation/pleasure trip | - | <input type="radio"/> | |
| Decision to visit Hawai'i | - | <input type="radio"/> | |
| Decision on which islands to visit | <input type="radio"/> | <input type="radio"/> | |
| Determining the dates of your trip | <input type="radio"/> | <input type="radio"/> | |
| Choosing a place to stay | <input type="radio"/> | <input type="radio"/> | |
| Making airline reservations | <input type="radio"/> | <input type="radio"/> | |
| Purchasing airline tickets | <input type="radio"/> | <input type="radio"/> | |
| Making accommodation reservations | <input type="radio"/> | <input type="radio"/> | |
| Making rental car reservations | <input type="radio"/> | <input type="radio"/> | |
| Purchasing tour or attraction packages | <input type="radio"/> | <input type="radio"/> | |
| Other (specify) | <input type="radio"/> | <input type="radio"/> | |

12. Which of the following did you use for information about Hawai'i (A) before your trip, (B) during your trip, and (C) after your trip to keep up with what's happening in Hawai'i? (Mark all that apply)

| | (A) Before | (B) During | (C) After |
|---|-----------------------|-----------------------|-----------------------|
| a Travel agents/ Companies specializing in packaged tours | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b Online social networking site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c Recommendations from friends or relatives | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| d Information at hotels/ resorts (front desk/concierge/tour desk) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| e Smartphone or tablet applications relevant to your trip | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| f Information from airline/commercial carriers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| g Personal experience | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| h Online travel booking site/Online travel agent | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| i Online webpage or blog covering Hawai'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| j Hawai'i's visitor bureaus website (GoHawaii.com) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| k Magazines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| l Guide Books | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| m Television shopping channel/television program | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

13. If you used a, b, c, d or e in the question above please specify how you did so below (Mark all that apply)

| | a - Travel Agent/ Tour Company | b - Social Media | c - Friends or Family | d - Hotel Front Desk/ Concierge/ Tour Desk | e - Mobile Device/ Phone or Tablet Apps |
|--|--------------------------------|-----------------------|-----------------------|--|---|
| Deciding on your vacation destination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planning activities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making airline reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making hotel or other lodging reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making car rental reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchasing any tour, attraction, or activity | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Selecting restaurants/dining reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Finding places to shop | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Accessing maps and directions / GPS | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (specify): | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. When was your most recent trip to Hawai'i?

Month Year

15. This trip to Hawai'i was my:

- 1st 2nd 3rd 4th
 5th 6th to 10th More than 10th

16. Not counting this trip to Hawai'i, have you taken any overnight leisure trips by air of 500 miles or longer in the past three years?

- Yes (how many?) →
 No

17. Not counting this most recent trip to Hawai'i, what was the year of your last visit to Hawai'i?

18. And on that trip, which island(s) did you visit? (Mark all that apply)

- Island of O'ahu
- Island of Maui
- Island of Moloka'i
- Island of Lana'i
- (Hilo) Hawai'i Island
- (Kona) Hawai'i Island
- Island of Kaua'i

19. Did you ever live in Hawai'i before?

- Yes
- No

20. Do you have friends and/or relatives who live in Hawai'i?

- Yes
- No

21. Do you own property in Hawai'i?

- Yes, I own timeshare units
- Yes, I own other types of property
- No, but I plan to in the future
- No

Next, we would like to learn a little more about you.

22. What is your age?

23. What is your gender?

- Male
- Female

24. Please indicate your highest level of educational training:

- No / some high school
- High school graduate
- Some college
- Vocational/technical
- Associates (2 year) degree
- College graduate (4 year)
- Post graduate degree

25. What is your employment status?

- Self-Employed
- Employed, working for someone else
- Retired
- Student
- Homemaker
- Other

26. Which of the following categories includes your household's total annual income from all sources before taxes for 2015 (in US dollars)?

- Up to \$40,000
- \$40,000 to \$59,999
- \$60,000 to \$79,999
- \$80,000 to \$99,999
- \$100,000 to \$124,999
- \$125,000 to \$149,999
- \$150,000 to \$174,999
- \$175,000 to \$199,999
- \$200,000 to \$249,999
- \$250,000 or more

27. Approximately how much did you and the immediate members of your travel party spend on your trip to Hawai'i? Include all shopping, dining, lodging, airfare and all other spending (in US dollars, no commas).

US\$

28. How would you rate your overall satisfaction with your most recent trip to Hawai'i?

| | | | | | | | | |
|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Extremely Satisfied | | | | | | | | Not at all Satisfied |
| | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

29. Please tell us about ONE detail that made your trip to Hawai'i excellent.

- Packaged Tour or Activity
- Events (observed or participated)
- Weather
- Friendly, warm people/ Customer service/ Hospitality
- Nature/ Natural beauty, scenery
- Relaxation/ Good atmosphere
- Accommodations
- Local culture/ Food/ Music
- Military historical sites
- Activities/Attractions (not specified as part of a package)
- Events/ Celebrations with friends/ family
- Overall, non-specific positive evaluation
- Beach/ Ocean
- Other (please specify) _____

30. If applicable, please share ONE experience that posed a negative impact to your stay in Hawai'i.

- Travel Problems (cost, airport, airline, TSA/customs, cruise)
- Weather
- Food/ Restaurants (cost, accessibility, options, quality)
- Accommodations (cost, location, service, pests, amenities, not as advertised)
- Rental car (cost, service, vehicle or reservation problems; parking availability, cost)
- Driving (signage, road surface, traffic violations, bad drivers)
- Cost/ Expensive (non-specific)
- Homelessness
- Ground transportation (cost, availability, trolleys, buses, taxis, shuttles)
- Better planning/ More information (signage, maps, research)
- Commercialization/ Urbanization/ Crowds/ Loss of local culture
- Unfriendly/ Poor service/Felt unwelcome/Japanese catered to
- Disappointing experience/ Could not access desired experience
- Crime/ Safety/ Problems with law enforcement
- Illness or injury
- Nuisances (dirty or unavailable public restrooms, litter, bugs, animals, noise, shabby)
- Solicitors (esp. timeshare and street solicitors in Waikīkī)
- Traffic (congested/slow)
- Other (please specify) _____

- No negatives

31. We would like to know if you experienced any negative issues or events while in Hawai'i.

- Wallet/purse/valuables stolen
- Room was vandalized/robbed
- Car was vandalized/robbed
- Physical violence/harm/harassment
- Verbal harassment
- Solicited by prostitutes
- Solicited by drug dealers
- Seeing homeless people
- Received parking or other auto violations
- Severe weather/natural calamities/windy
- Service problems
- Other negative (specify) _____

- No negatives

**MAHALO FOR YOUR KOKUA (thank you for your help).
Your feedback is important and your opinion counts. Please return the completed survey in the postage-paid envelope as soon as possible.**