



2015
VISITOR SATISFACTION
AND ACTIVITY REPORT

HAWAII TOURISM
AUTHORITY

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ABOUT THIS REPORT

The 2015 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. 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. Visitors from U.S. West, U.S. East, Japan, Canada, Europe, and Oceania were surveyed. 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.

AVAILABILITY OF THIS REPORT

This report and the companion Excel workbook of 2015 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: Mr. Daniel Nahoopii, Director, Ms. Minh-Chau T. Chun, Ms. Jennifer 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. 173-176.

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 six Major Market Areas – U.S. West, U.S. East, Canada, Japan, Europe, and Oceania.

Major Market Area (MMA): Geographic areas used to classify visitors according to their place of origin for the purpose of destination marketing management. VSAT 2015 reports data for the following MMAs:

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

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

2015 was another record year for visitor arrivals to the Hawaiian Islands with 8,679,564 visitors who came by air or by cruise ships. This represented a 4.3 percent growth from the previous high of 8,320,785 visitors in 2014. Total visitor days rose 3.5 percent. However, the average spending per day by these visitors (\$191 per person) declined compared to 2014 (\$196 per person). Therefore, total expenditures by all visitors in 2015 of \$15.11 billion was only a marginal increase from last year. When adjusted for inflation, total visitor expenditures were down 1.6 percent from 2014.

Arrivals by air to O'ahu rose 2.8 percent to 5,339,912 visitors in 2015. There were 2,540,162 visitors who came by air to Maui, up 5.1 percent from 2014. Arrivals to Moloka'i increased 7.8 percent to 64,767. However, there was a 14.3 percent drop in arrivals to Lāna'i (to 58,390 visitors) as most of the hotels on the island were closed for renovations. Arrivals Hawai'i Island grew 4.1 percent to 1,514,973 visitors while arrivals to Kaua'i were up 4.8 percent to 1,173,752 visitors.

For a complete analysis of Hawai'i's visitor industry, please refer to the 2015 Annual Visitor Research Report posted on the HTA website at:

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

and click on 2015 Annual Research Report (pdf).

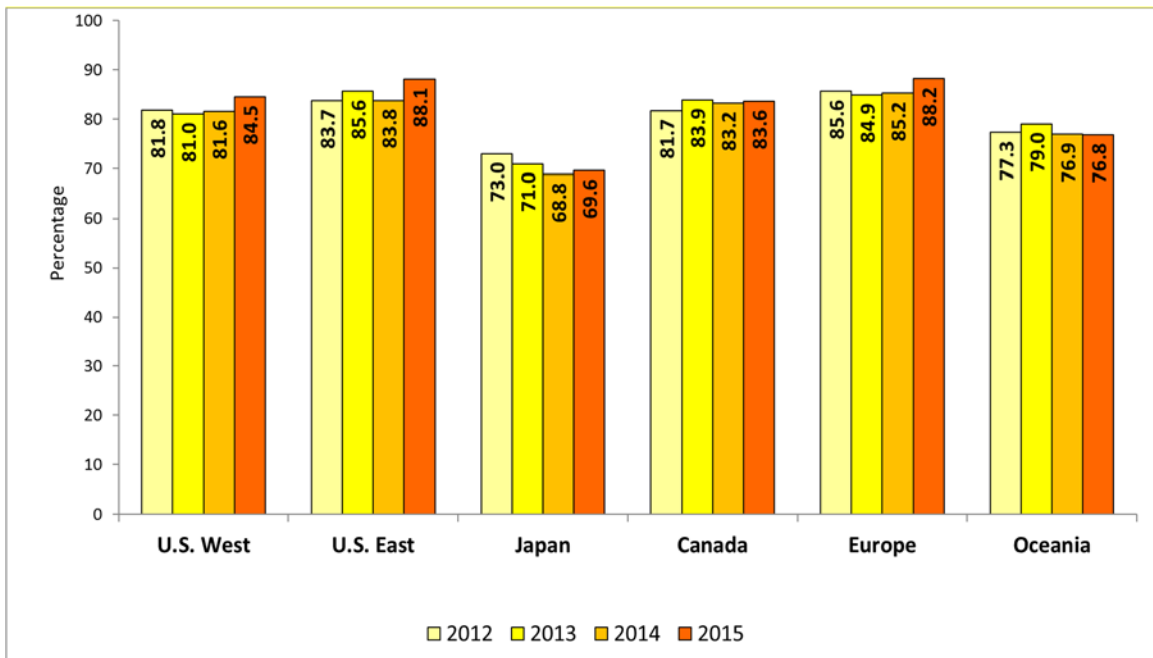
VISITOR SATISFACTION

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 2015 annual VSAT data tables posted on the HTA website).

OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I.

The majority of visitors in 2015 continued to give high marks for their overall experience in Hawai'i, and "excellent" ratings for several visitor markets were higher compared to 2014.

Figure 1: Overall Rating of Trip
(Percentage of visitors who rated most recent trip "Excellent" by MMA)²



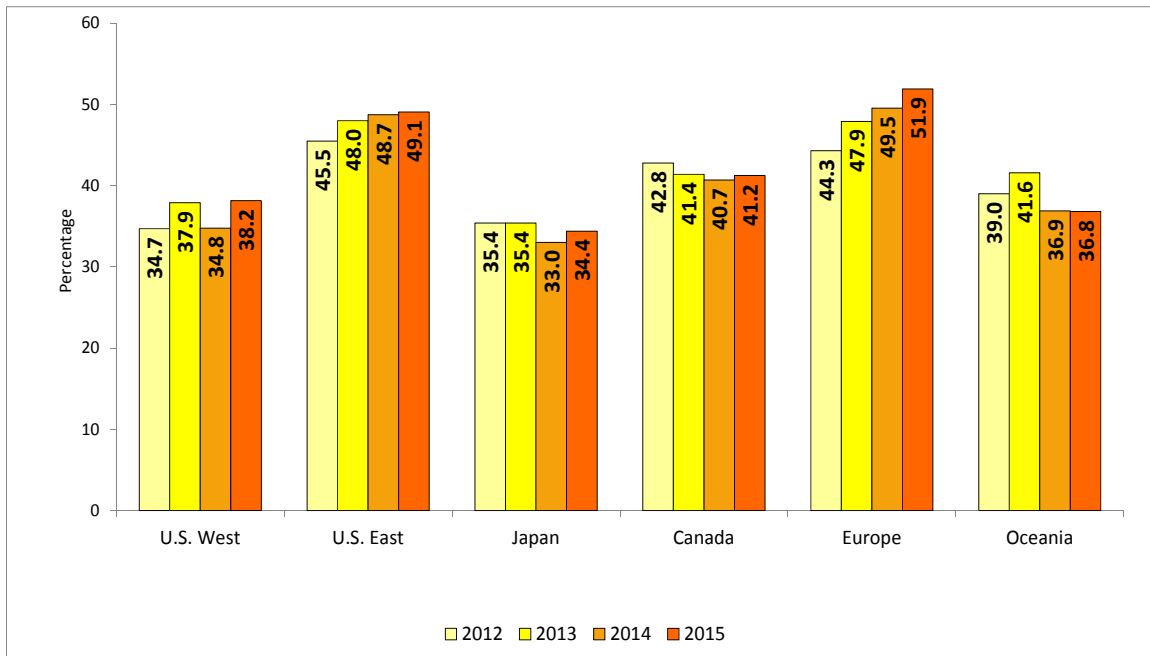
- In 2015, 88.1 percent of U.S. East respondents gave excellent ratings to their most recent trip to Hawai'i, up 4.3 points from the prior year.
- Ratings by European and U.S. West visitors rose by 3 points and 2.9 points, respectively.
- Ratings by visitors from Canada (83.6%) and Oceania (76.8%) were relatively unchanged compared to 2014.
- Ratings by Japanese visitors (69.6%) have remained stable in the last two years.

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, motivations, and interests. Therefore, it is important to measure how well the destination meets expectations. Hawai'i's ability to "exceed expectations" remained quite strong. Ratings by visitors from several markets increased compared to 2014, and very few respondents (less than 5%) felt that Hawai'i "did not meet their expectations" at all.

Figure 2: Trip Exceeded Expectations
(Percentage of visitors who said this trip "Exceeded Expectations" by MMA)

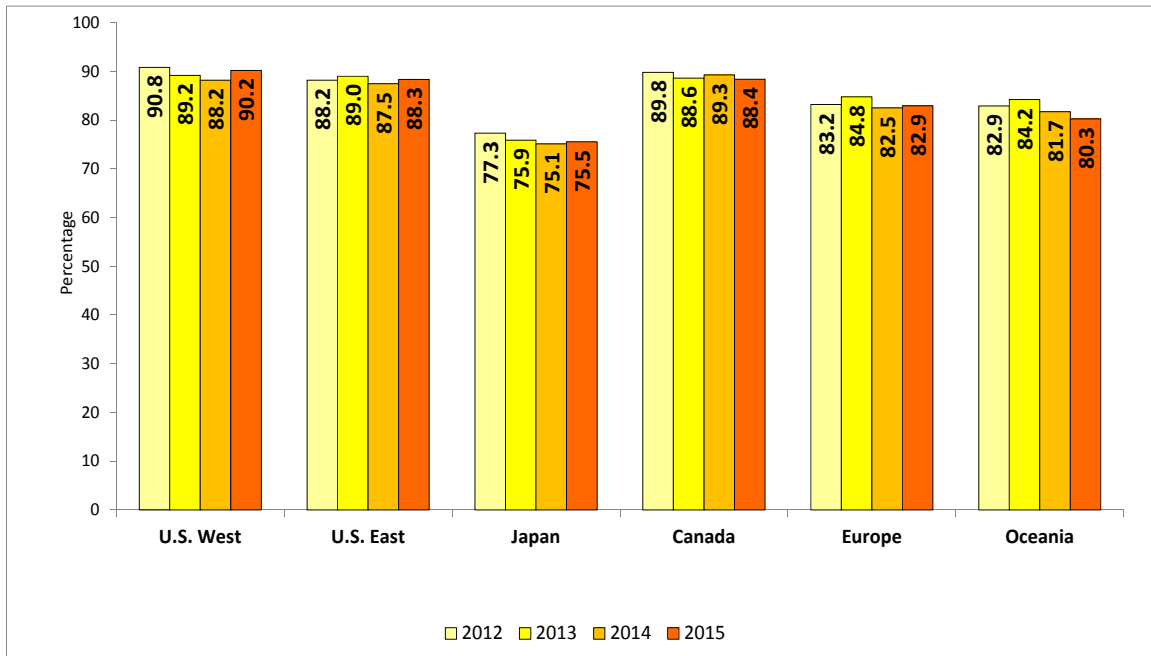


- A higher percentage of U.S. West (+3.4 points, to 38.2%) felt their trip exceeded their expectations compared to 2014.
- Ratings by European visitors (51.9%) have steadily improved over the past four years.
- Ratings by Japanese visitors (34.4%) was at a similar level to previous years.
- Ratings by visitors from U.S. East (49.1%), Canada (41.2%) and Oceania (36.8%) were consistent with 2014.

LIKELIHOOD TO RECOMMEND HAWAI‘I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. Word-of-mouth is a critical aspect of Hawai‘i’s marketing efforts because these referrals create more First-Time visitors to Hawai‘i and encourage previous visitors to return.

**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)**

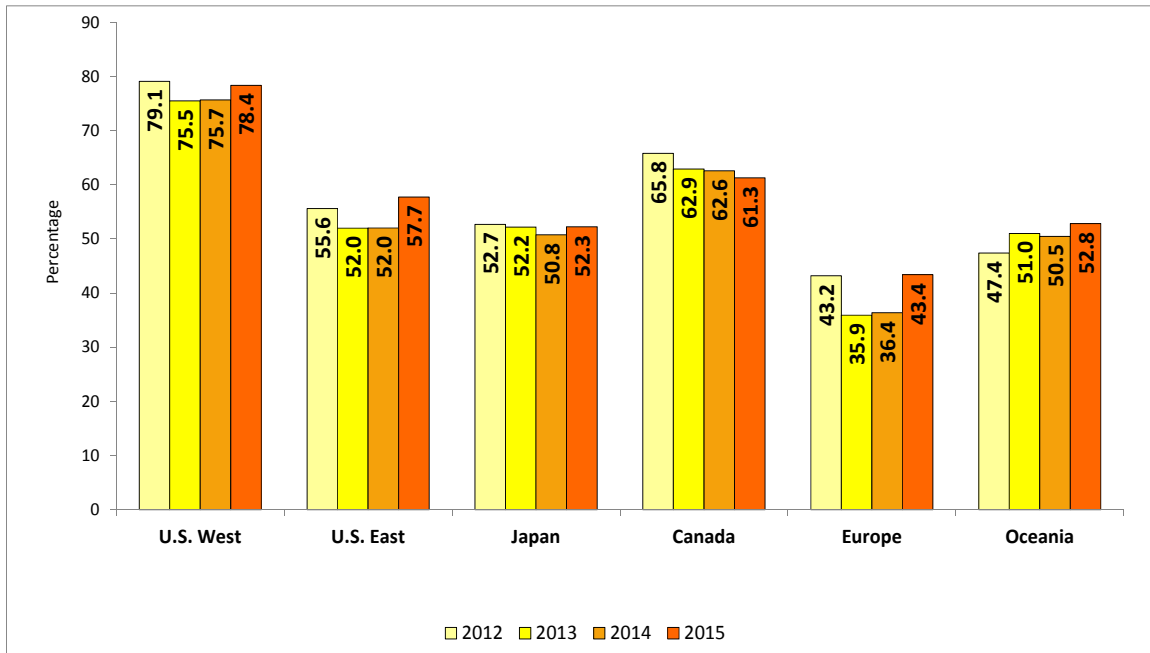


- The majority of visitors continued to respond that they would “very likely” recommend Hawai‘i to others. Across all visitor markets, ratings from 2015 respondents showed little change from the previous year.
- Less than 4 percent of visitors from each markets were “not too likely” or “not at all likely” to recommend Hawai‘i.

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)



- Over half of U.S. East visitors 2015 said that they would "very likely" return to Hawai'i in the next five years. This was an increase of 5.7 points from 2014.
- With the closest proximity to Hawai'i among the visitor groups, eight out of ten U.S. West respondents said that they would "very likely" return (+2.7 points).
- Six out of ten Canadians and half of Oceania and Japanese visitors in 2015 said they would very likely come back. These percentages were fairly consistent with 2014.
- With the long distance and no direct flights to Hawai'i, the percentage of European visitors who will likely return were around 35 percent. In 2015, their rating improved 7 points to 43.4 percent.

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)

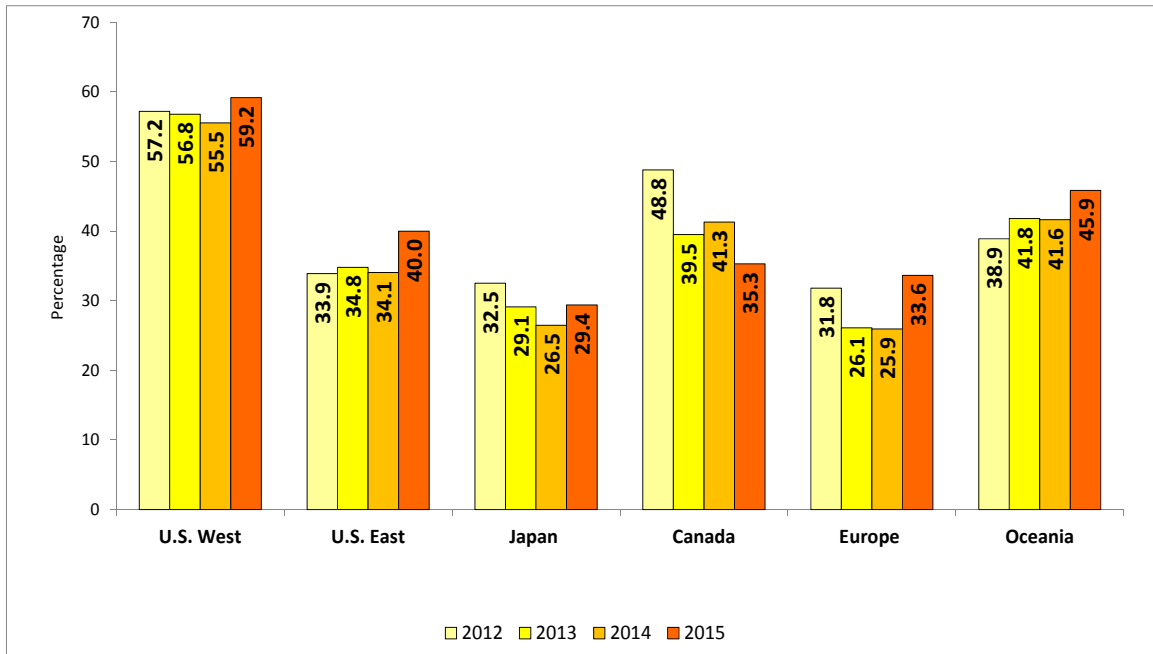
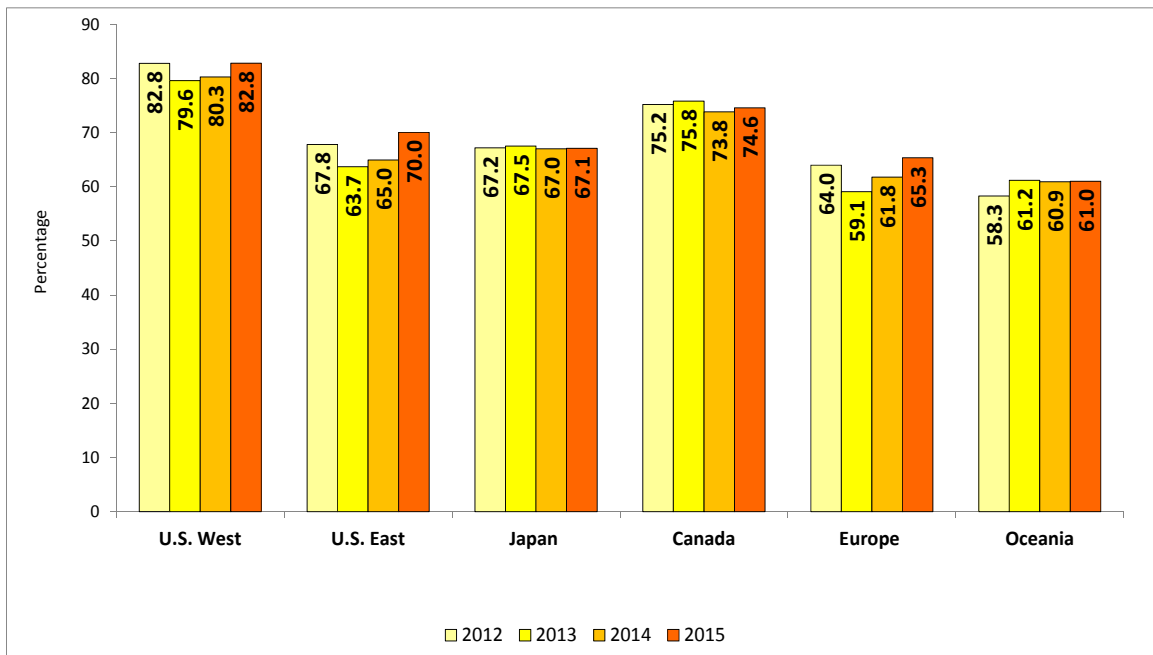


Figure 6: Repeat Visitors Very Likely to Revisit Hawai'i
 (Percentage of Repeat visitors "Very Likely" to revisit in the next five years by MMA)



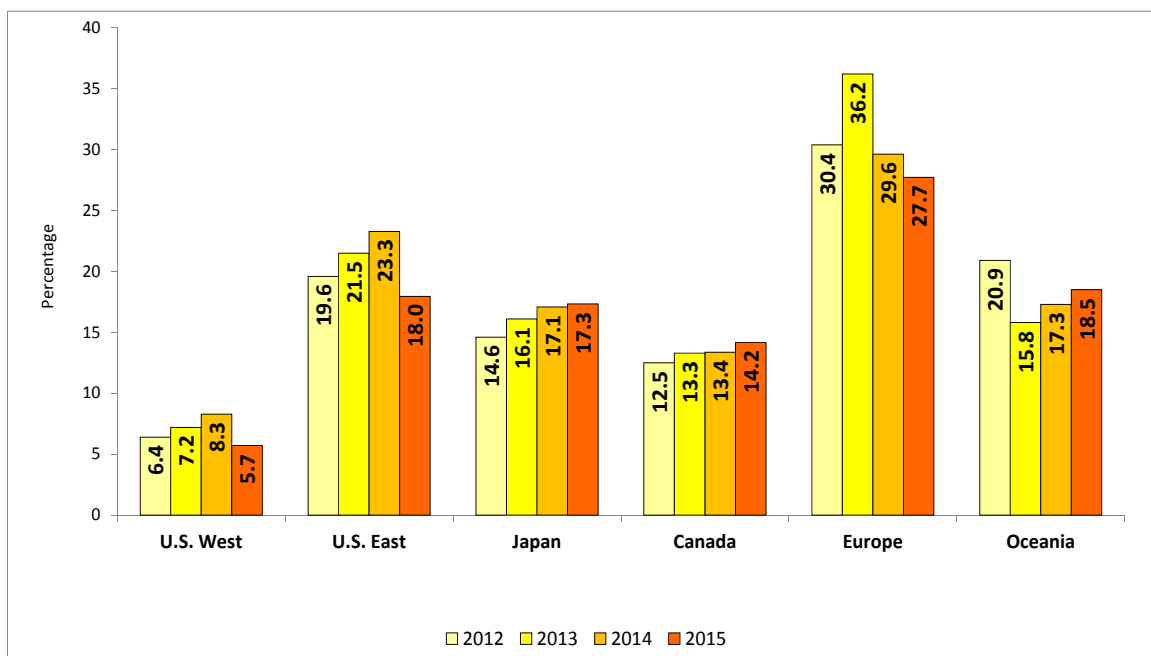
- Among U.S. West respondents, a higher percentage of First-Time visitors (+3.7 points to 59.2%) said that they would "very likely" return, while 82.8 percent (+2.5 points) of Repeat visitors said that they would come back.

- For U.S. East respondents, 40 percent of First-Time visitors said they would return, up from 34.1 percent in 2014. A greater percentage of Repeat Visitors (+5 points to 70%) said that they would very likely return compared to 2014.
- Among Japanese respondents, even though the percentage of likelihood to return did not increase overall, there was a distinct increase in the desire of first-time visitors to return (+2.9 points to 29.4%), while ratings from Repeat visitors (67.1%) were similar to last year.
- For Canadian respondents, fewer First-Time visitors (-6 points to 35.3%) said that they will very likely revisit the islands. Ratings from Repeat visitors (+0.8% 74.6%) were comparable to 2014.
- Among European respondents, a higher of First-Time visitors (+7.7 points to 33.6%) and Repeat visitors (+3.5 points to 65.3%) said that they would likely return.
- For Respondents from Oceania, the likelihood of returning by First-Time visitors rose 4.3 points to 45.9 percent, while ratings by Repeat visitors (61%) were virtually unchanged from 2014.

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 continued to be lowest among U.S. West visitors and highest among European visitors.

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)



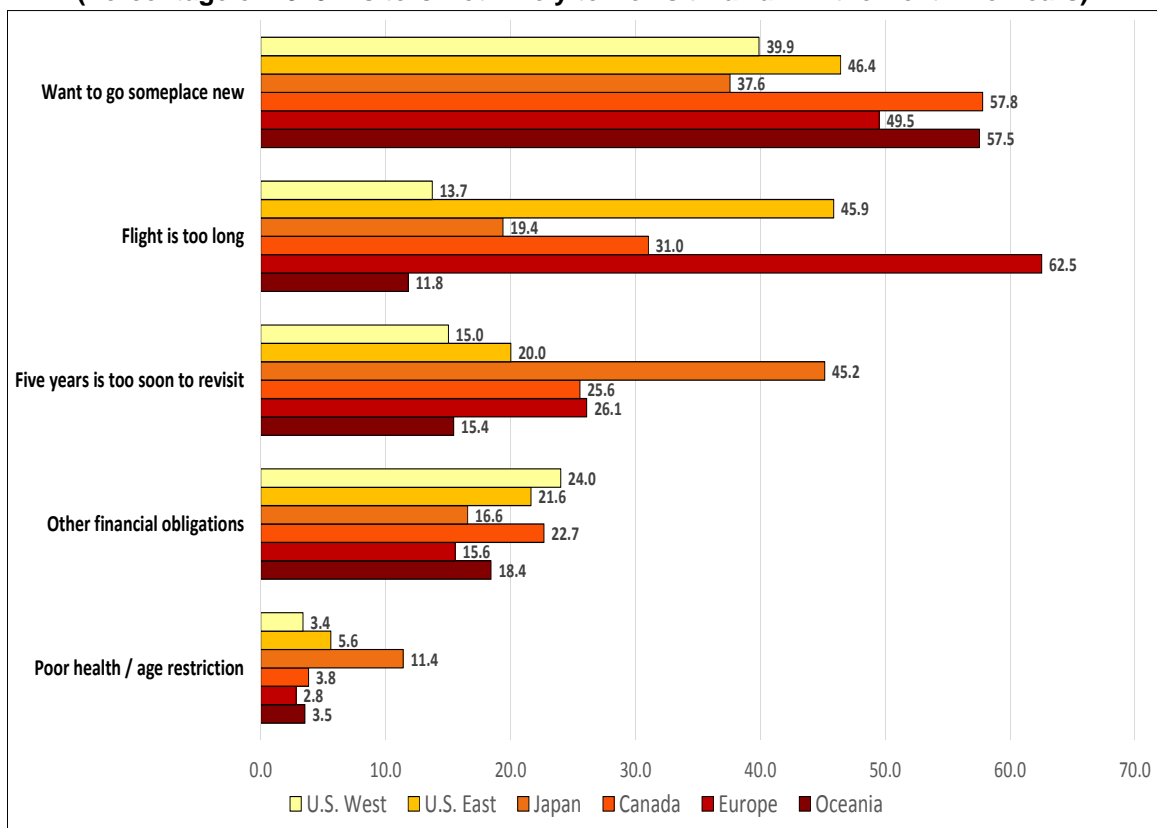
- For European respondents in 2015, the percentage of not likely to return improved to 27.7 percent, the best in the last four years.
- Ratings by U.S. East (-5.3 points) and U.S. West (-2.6 points) respondents were also better compared to 2014.
- Ratings from Oceania (18.5%), Japanese (17.3%) and Canadian (14.2%) respondents were similar to a year ago.

Reasons for Not Revisiting Hawai'i

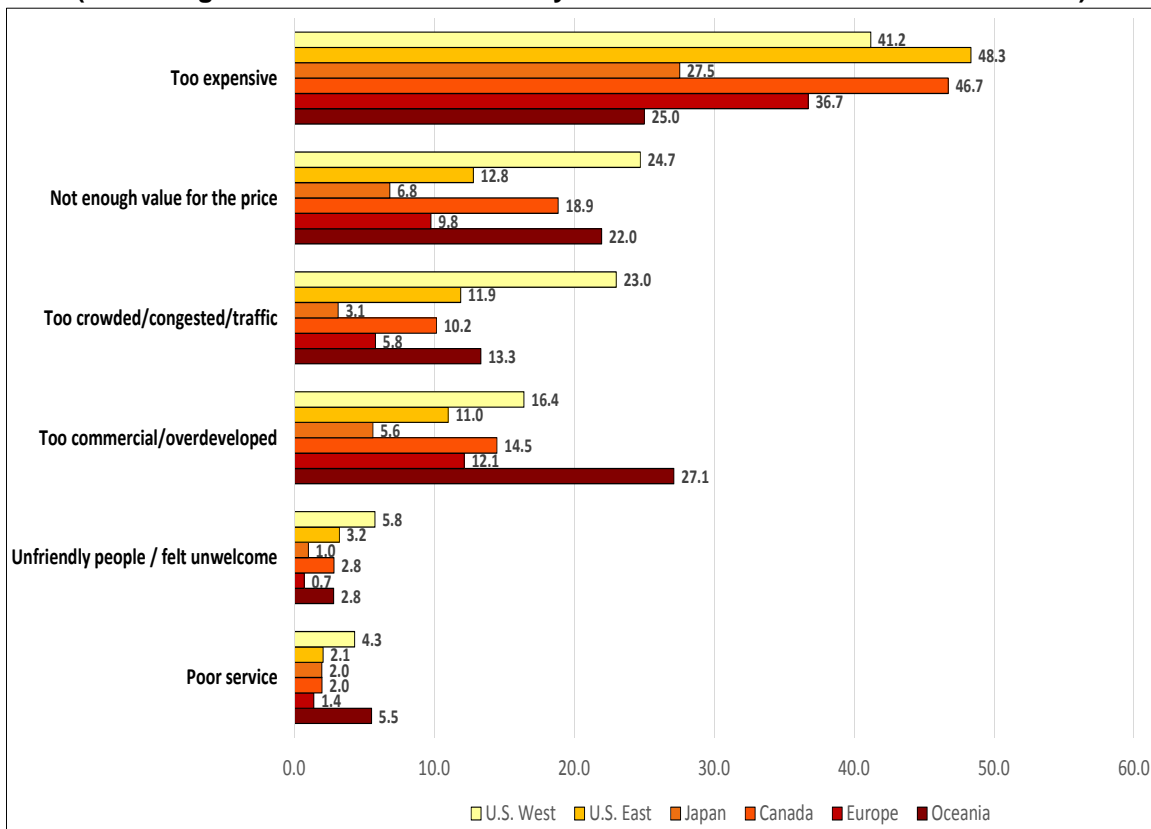
Respondents to the 2015 survey who said that they would “not too likely” or “not at all likely” return were asked to give the reason(s). A list of 11 reasons were offered in the survey and respondents could check all that applied.

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 8: Reasons for Not Returning by MMA – “Barriers”
(Percentage of 2015 Visitors Not Likely to Revisit Hawai'i in the Next Five Years)



**Figure 9: Reasons for Not Returning by MMA – “Performance Issues”
(Percentage of 2015 Visitors Not Likely to Revisit Hawai‘i in the Next Five Years)**



U.S. West: In 2015, 39.9 percent of U.S. West respondents said they will not return because they want to go someplace new, down from 51.6 percent last year. Respondents also mentioned other financial obligations (+6.3 points to 24%) as barriers for not returning.

In terms of performance issues, fewer U.S. West respondents said that they will not be returning because Hawai‘i is too expensive (-9.7 points to 41.2%), there is not enough value for the price (-7.4 points to 24.7%), and Hawai‘i is too commercial/overdeveloped (-5.3 points to 16.4%) compared to a year ago.

U.S. East: Similar to 2014, the desire to go someplace new (46.4%) and the long flights (45.9%) were the top two barriers cited by U.S. East visitors.

The high cost (+2.6 points 48.3%) continued to be the primary performance issue affecting U.S. East visitors’ likelihood to return.

Japan: Japanese respondents in 2015 continued to cite more barriers than performance-related issues as reasons for not returning. Similar to 2014, about half of the visitors said that five years is too soon to revisit (45.2%). Fewer visitors wanted to go someplace new (-3.1 points to 37.6%) but more said that the flight is too long (+6.2 points to 19.4%) compared to 2014.

The high cost remained the primary performance issues for Japanese respondents, though not as prevalent an issue as it was for the other markets. In 2015, 27.5 percent of the respondents said that Hawai'i is too expensive to revisit, up 9.7 points from last year. However, only 6.8 percent (+1.3 points) said there was not enough value for the price they paid.

Canada: The desire to visit someplace new (+3.8 points to 57.8%) continued to be the main barrier to revisiting Hawai'i among Canadian visitors. Other reasons provided were the long flight (31%) and five years is too soon to revisit (25.6%).

The primary performance-related issue was the high cost (46.7%) which rose 9.8 points from 2014. More respondents also felt that there is not enough value for the price (+6.2 points to 18.9%) compared to last year.

Europe: The long flight (+3.8 points to 62.5%) continued to be the primary barrier to European visitors' return to Hawai'i. Other reasons provided were the desire to go someplace new (-4.9 points to 49.5%) and five years is too soon to revisit (-7.1% to 26.1%), but these percentages were lower than 2014.

The high cost (36.7%) was the most cited performance-related reason for not revisiting, up 8.3 points from last year. Some Europeans felt that Hawai'i is too commercial/overdeveloped (-1.6 points to 12.1%) and there is not enough value for the price (+2.6 points to 9.8%).

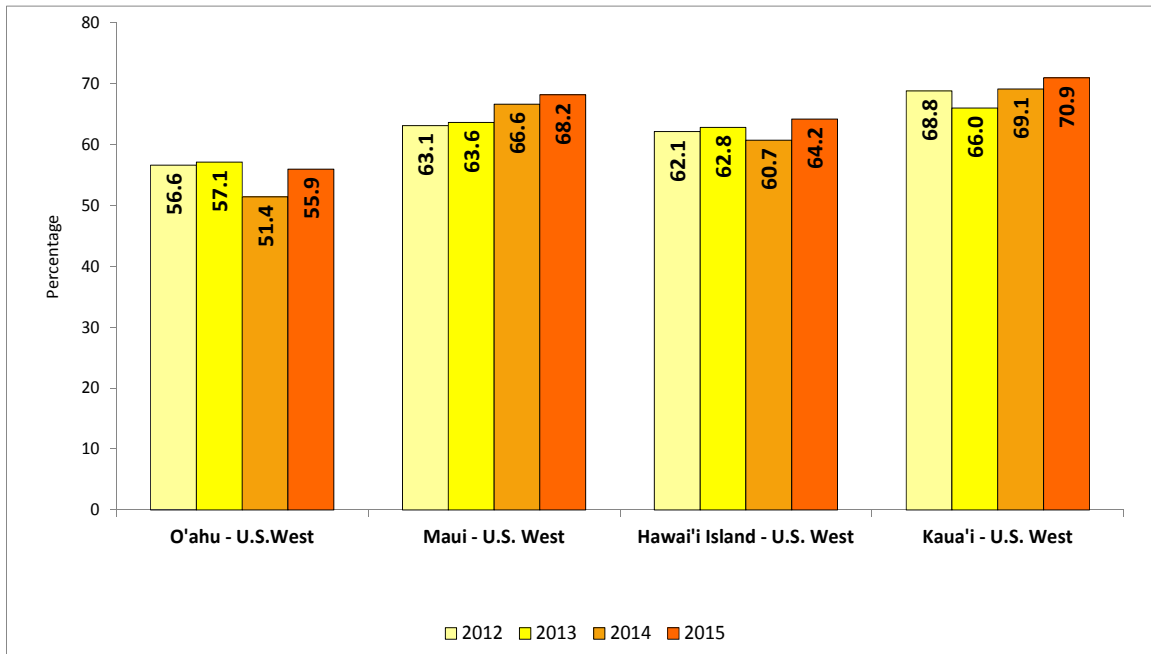
Oceania: Among this group of respondents, the most common barrier for revisiting continued to be the desire to go someplace new (-3.8 points to 57.5%). Fewer respondents also said five years is too soon to revisit (-4.2 points to 15.4%).

In terms of performance issues, more Oceania respondents felt that Hawai'i was too commercial/overdeveloped (+6.1% to 27.1%). While Oceania visitors did have growing concerns about the high cost (+11.6 points to 25%) and not enough value (+8.4 points to 22%), these issues were not as troublesome to them as they were to visitors from the North American markets.

INDIVIDUAL ISLAND EXPERIENCE

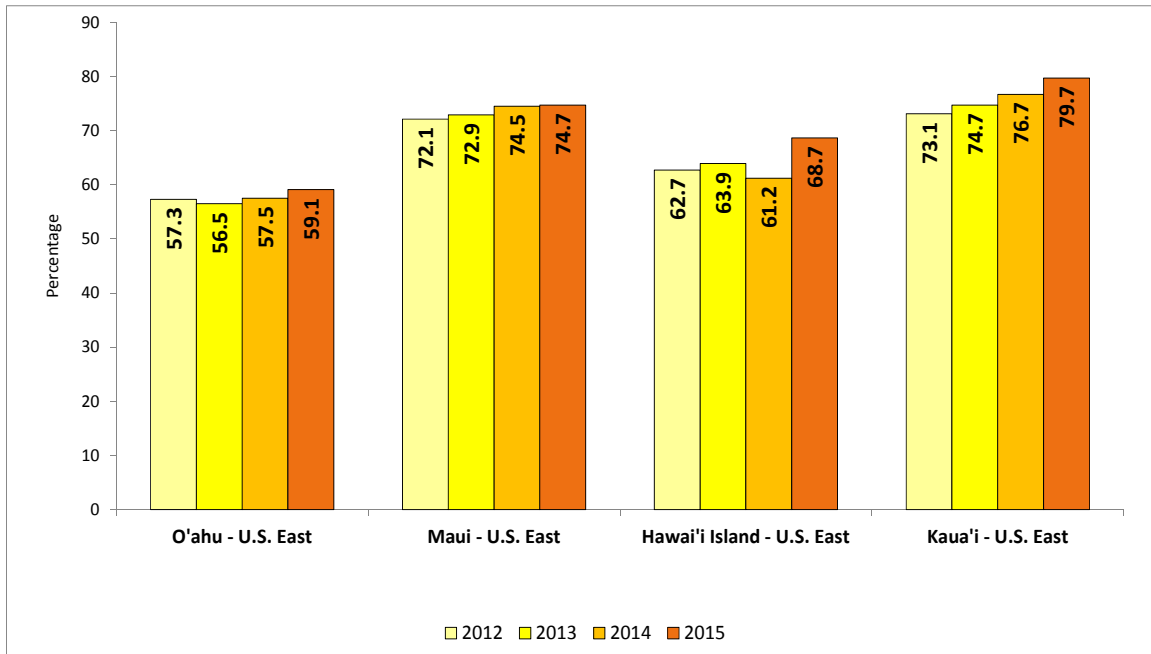
Each island has unique characteristics, activities, and products that provide different visitor experiences. Overall, the majority of visitors reported that their individual island experiences were “excellent.”

**Figure 10: Island Experience Rated as “Excellent” – U.S. West
(Percentage of visitors by island)**



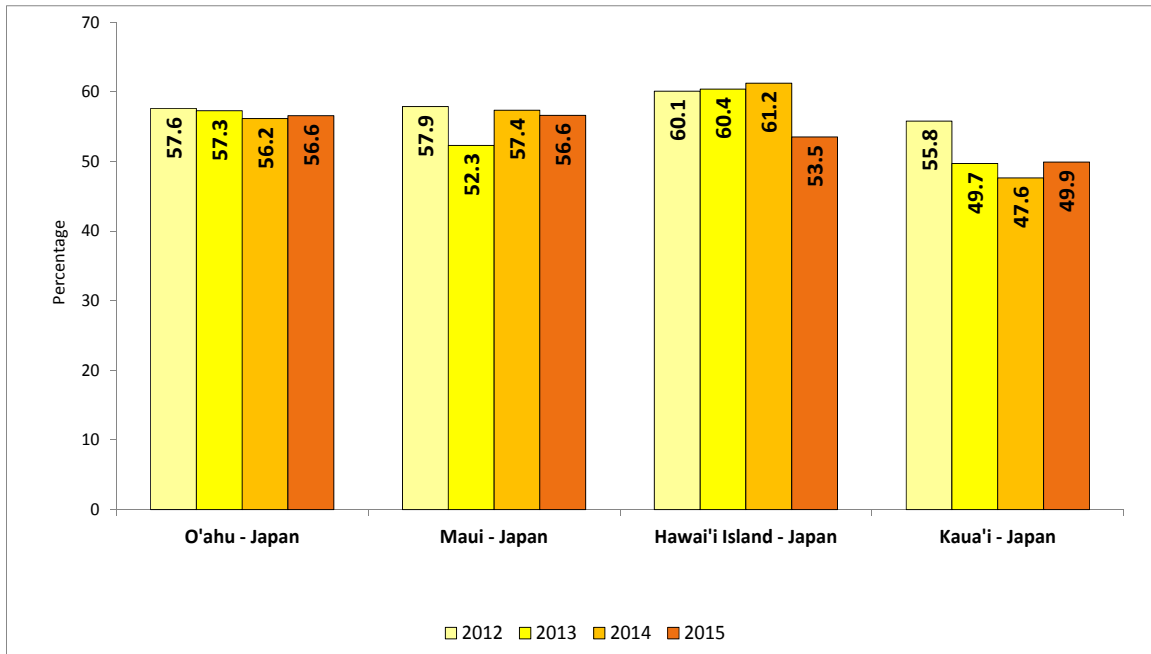
- In 2015, 55.9 percent of U.S. West visitors gave excellent ratings to O’ahu, up 4.5 points from last year.
- Percentages of excellent ratings for Kaua’i (70.9%), Maui (68.2%) and Hawai’i Island (64.2%) were the highest in the past four years.

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



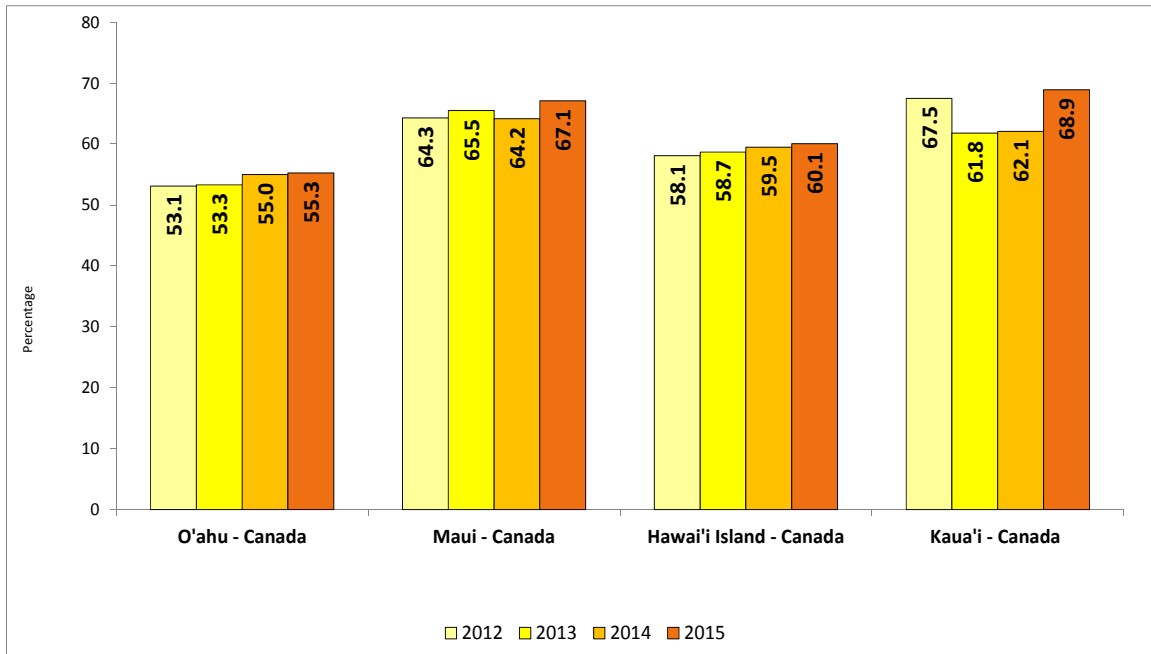
- In 2015, excellent ratings for Hawai'i Island by U.S. East visitors rose 7.5 points to 68.7 percent
- Percentages of excellent ratings for Kaua'i have been steadily improving over the last four years.

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



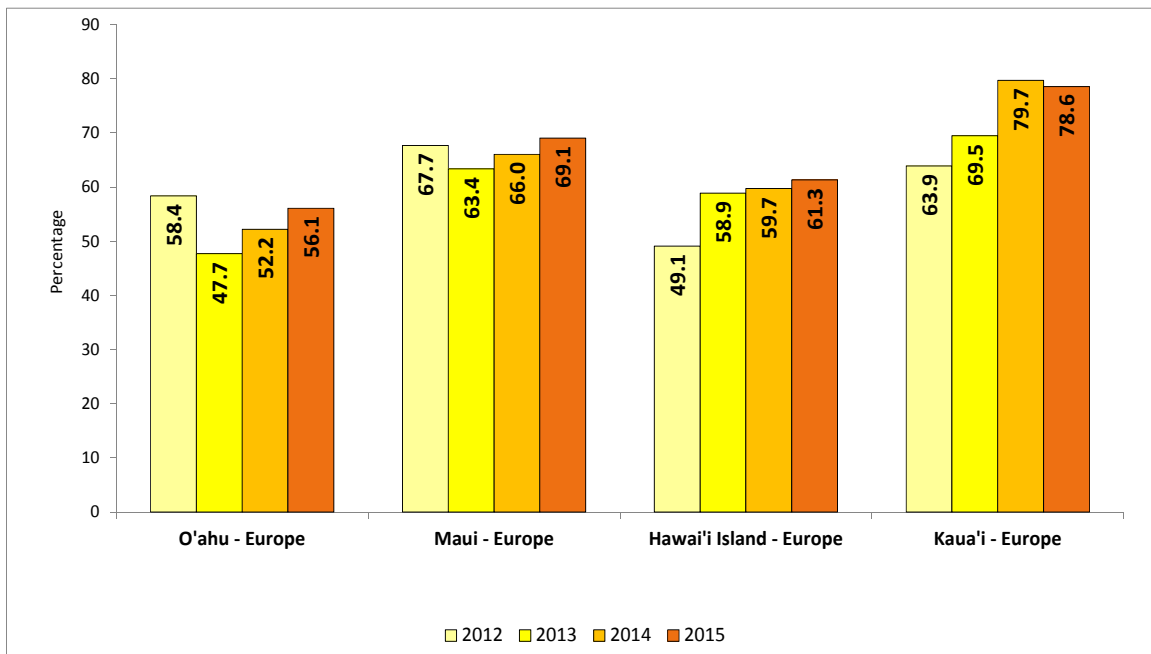
- Excellent ratings for Hawai'i Island declined (-7.7 points to 53.5%) from 2014. However, 42.5 percent of the respondents still rated Hawai'i Island “above average” and only 4 percent gave ratings of “below average” or “poor”.
- Over half of Japanese respondents in 2015 gave excellent ratings to O'ahu, which was fairly consistent with percentages from the last four years.
- Maui's percentage of excellent ratings (56.6%) was similar to 2014.
- In 2015, Kaua'i's ratings improved 2.3 points to 49.9 percent. It should be noted that fewer Japanese respondents visited Kaua'i than the other islands and the sample size is relatively small.

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



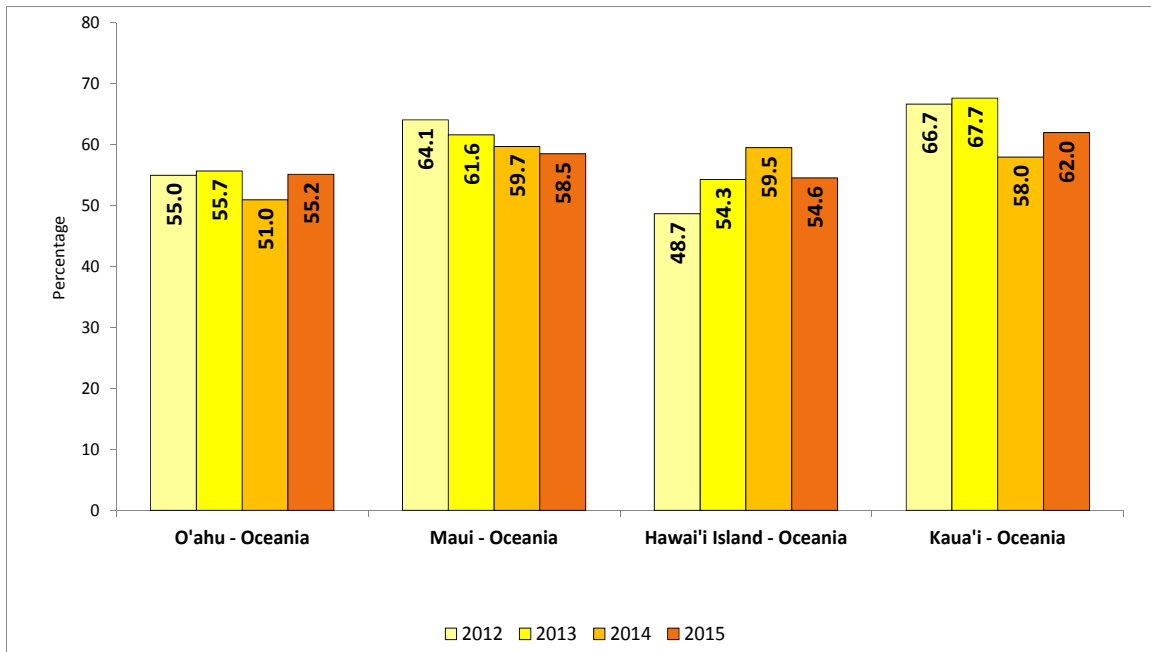
- In 2015, Kaua'i's excellent ratings by Canadian visitors improved 6.8 points to 68.9 percent.
- Maui's ratings of 67.1 percent was an increase of 2.9 points from 2014.

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



- Among European respondents, Kaua'i (78.6%) continued to receive a higher percentage of excellent ratings than the islands.
- Excellent ratings for O'ahu (+3.9 points) and Maui (+3.1 points) increased compared to 2014.

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



- Excellent ratings by Oceania visitors for O'ahu (+4.2 points) and Kaua'i (+4 points) improved from 2014.
- Hawai'i Island's rating fell 4.9 points to 54.6 percent.
- Maui's ratings (58.5%) have been declining over the past four years.

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 2015 visit to Hawai'i (See the companion Excel workbook of 2015 VSAT data tables posted on the HTA website for activities statistics).

U.S. West

Entertainment and dining: Nearly all U.S. West visitors in 2015 engaged in entertainment and dining activities statewide (98.1%).

- In dining options, the majority of the respondents ate at family restaurants (74.2%) with similar percentages on O'ahu, Maui and Kaua'i.
- Six out of ten respondents prepared their own meals. U.S. West visitors had the highest tendency to prepare their own meals (63.4%) while on Kaua'i.
- A higher percentage of U.S. West visitors participated in fine dining (60.6%) and lunch/sunset/dinner/evening cruises (28.2%) while on Maui.
- More U.S. West visitors on O'ahu went to night club/dancing/bar/karaoke (13.1%) and indulged in ethnic dining (37.1%).

Shopping: Most U.S. West respondents went shopping (96.3%) statewide.

- The majority of them shopped in local shops/artisans (72.1%), particularly on Kaua'i (75.1%) and Maui (70.5%).
- Over half of U.S. West respondents shopped in supermarkets (67.4%) and department stores (51.3%). Some also shopped at farmers' markets (38.4%), hotel stores (37.9%), designer boutiques (28.6%), swap meet (25.5%) and discount outlets (24%).

Recreation: U.S. West respondents in 2015 actively participated in recreation (95.5%).

- Beach/sunbathing/swimming (86.6%) was the most popular, followed by snorkeling/scuba diving (45.2%) and running/jogging/fitness walking (39.7%).
- In 2015, more U.S. West visitors participated in recreation activities on Kaua'i (91%) and Maui (90.3%) than on the other island. Swimming/sunbathing/beach (82.7%) and snorkeling/scuba diving (48.2%) were especially popular on Maui.
- A higher percentage of U.S. West visitors went backpacking/hiking/camping (30.3%) on Kaua'i.

Historical and cultural activities: Seven out of ten U.S. West visitors engaged in historical and cultural activities (71.4%) statewide. Historical military sites (24.6%), other historical sites (34%), museums/art galleries (26.7%) and lū'aus (25.6%) were popular attractions.

Transportation: Nine out of ten U.S. West visitors used some mode of transportation (90%) and the majority of the respondents used rental cars (79.2%). Some visitors used airport shuttles (28.1%), taxis/limos (12.4%) and tour buses/tour vans (10.8%).

U.S. East

Entertainment and dining: Most U.S. East visitors engaged in these activities (97.5%).

- Over half of the respondents ate at family restaurants while on O‘ahu (62.5%), Maui (57.8%) and Kaua‘i (53.9%).
- More U.S. East visitors indulged in fine dining (60.2%) or went on lunch/sunset/dinner/evening cruises (31.1%) while on Maui compared to other island destinations.
- A third of the respondents prepared their own meals while on O‘ahu, Maui, Kaua‘i and Kona.

Shopping: The majority of U.S. East respondents shopped while on Maui (89.7%), O‘ahu (88.8%), Kauai (85.8%) and in Kona (77.9%), and over half of the respondents shopped in local shops/artisans.

- While on O‘ahu, department stores (49.9%) and convenience stores (48.2%) were the next most popular.
- While on Maui (53.2%) and Kaua‘i (49.5%), over half of U.S. East respondents shopped in supermarkets.

Recreation: Most U.S. East respondents in 2015 participated in recreation activities (95.8%).

- The majority went to the beach for sunbathing/swimming (86.7%). Visiting state parks/botanical gardens (57.4%), snorkeling/scuba diving (40.5%) and running/jogging/fitness walking (37.2%) were also popular with this group of visitors.
- In 2015, a similar percentage of U.S. East visitors went swimming/sunbathing/beach while on Maui (78%) and Oahu (75.6%).
- State parks/botanical gardens were especially popular with U.S. East visitors while they were on Kaua‘i (55%) and Hilo (51.9%)

Historical and cultural activities: Eight out of ten U.S. East visitors engaged in historical and cultural activities (81.6%), and most of their participation took place on O‘ahu. The majority of the respondents visited historical military sites (61.5%). Three out of ten respondents visited other historical sites (33.8%), lū‘aus (27.6%) and Polynesian shows/ hula shows (26.1%).

Transportation: Nine out of ten U.S. East visitors used some mode of transportation (89.5%). The majority of the respondents rented cars (73.5%), while some used airport shuttles (32.2%) and tour buses/tour vans (23.5%).

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 2015 went shopping (96.9%) statewide.

- Department stores (84%) were the most popular, followed by convenience stores (66.7%), supermarkets (61.5%), duty free stores (51.6%), hotel stores (43.3%), designer boutiques (35.5%) and discount outlets (33.8%).
- Fewer Japanese respondents shopped in local shop/artisans (19.3%) compared to visitors from other markets.

Entertainment and dining: Most Japanese visitors participated in these activities statewide (93.7%).

- A higher percentage of Japanese visitors went on lunch/sunset/dinner/evening cruises (57.9%) than other visitor groups.
- Half of the respondents dined at fast food establishments (51.5%) and cafés/coffee houses (50.1%). Four out of ten Japanese respondents indulged in fine dining (39.8%) and 34.7 percent ate at family restaurants/diners. A fairly low percentage of respondents prepared their own meals (17.8%).

Sightseeing: Nine out of ten (89%) Japanese respondents in 2015 participated in sightseeing activities.

- Statewide, fewer Japanese visitors went on self-guided tours (57.3%) compared to U.S. West (87.9%), U.S. East (85.8%), Canadian (88.8%) and European (83%) visitors.
- On O‘ahu, 56.2 percent of the Japanese visitors opted for self-guided tours.
- While in Hilo (41.2%) and Kona (35.2%), limos/van tours/tour buses were the preferred way to go sightseeing.

Recreation: The majority of Japanese respondents in 2015 participated in recreation (83.1%). Beach/sunbathing/swimming (66.6%) were the most popular activities, followed by running/jogging/fitness walking (20%) and snorkeling/scuba diving (16.7%).

Historical and cultural activities: Half of the Japanese respondents in 2015 engaged in these activities. A quarter of the visitors saw Polynesian shows/ hula shows (25.9%), 14.2 percent visited historical military sites and 13.3 percent visited other historical sites.

Transportation: Among all visitor groups, Japanese visitors in 2015 continued to be heaviest user of trolleys on O‘ahu (54.5%). Usage of rental cars (21.1%) continued to be lower than other visitor markets statewide.

Canada

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

Entertainment and dining: Nearly all Canadian visitors participated in these activities statewide (98.6%).

- A higher percentage of Canadian visitors indulged in fine dining (52.5%) while on Maui.
- More respondents went to family restaurants/diners (69.9%), live acts/stage shows (32.8%), ethnic restaurants (28.6%), and nightclubs/dancing/bars/karaoke (12.9%) while on O‘ahu.
- Statewide, more visitors from Canada prepared their own meals (70.6%) than other visitor groups.

Shopping: Most Canadian respondents in 2015 went shopping (98.1%) statewide.

- A higher percentage of Canadians shopped at local shops/artisans (76.3%), farmer’s markets (45.6%) and swap meets (29.9%) compared to other visitor markets.
- While on O‘ahu, Canadian visitors shopped in department stores (67.8%), and convenience stores (62.7%).
- While on Maui, the majority of Canadian visitors shopped in supermarkets (70.7%) and local shops/artisans (70.3%).

Sightseeing: Canadian visitors in 2015 actively participated in sightseeing activities across most island locations: Maui (95.5%), Kaua'i (92.7%), Kona (91.7%), O'ahu (91.2%) and Hilo (81.6%).

- Statewide, the majority went sightseeing self-guided (88.8%), while some visited local communities (41.1%), or went on boat/submarine/whale watching tours (29.1%).
- Boat/submarine/whale watching tours (29.7%) on Maui were popular with Canadian visitors, so were helicopter/plane tours (21.9%) on Kaua'i.

Recreation: A high percentage of Canadian visitors in 2015 participated in recreation statewide (97.4%). While on Maui, many respondents went swimming/sunbathing/beach (88.1%), snorkeling/scuba diving (52.5%), running/jogging/walking (39.3%) and surfing/bodyboarding (29.5%).

Historical and cultural activities: Three out of four Canadian visitors participated in culture activities (76.9%) statewide. Visits to historic military sites (49.9%), other historical sites (30.4%) and Polynesian shows/hula shows (29%) largely took place on O'ahu.

Transportation: Close to 95 percent of Canadian visitors statewide used some mode of transportation. More respondents utilized rental cars while on Maui (81.8%) and Kaua'i (75.2%) compared to other island destinations.

Europe

Entertainment and dining: Most European visitors participated in these activities (97.7%).

- Statewide, European visitors liked to eat in cafés/coffee houses (58.1%), family restaurants (55.5%), fine dining restaurants (54.7%) and fast food places (54.6%), while 44 percent prepared their own meals.
- A higher percentage of European visitors went to nightclubs/dancing/bars/karaoke (19.2%) compared to visitors from other markets.

Sightseeing: Most European respondents participated in sightseeing activities while on Kaua'i (94.5%), Maui (94.1%), O'ahu (93.9%), Kona (92.6%), and Hilo (89.7%), and eight out of ten visitors went on self-guided sightseeing tours.

Shopping: Most Europeans went shopping (96.9%) statewide, especially at supermarkets (73.5%), department stores (73%) and local shops/ artisans (69.5%). Other popular venues included hotel stores (35.5%), discount/outlets (30.2%) and designer boutiques (29.4%).

Recreation: A high percentage of European visitors (96.6%) participated in recreation. Most went swimming/sunbathing/beach (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.

Historical and cultural activities: Eight out of ten European visitors participated in these activities statewide (82%). Half of the respondents went to historic military sites (50.1%). Many also visited other historical sites (39.8%), museums/art galleries (25.9%) or saw a Polynesian shows/ hula shows (33.2%).

Oceania

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

Entertainment and dining: Most Oceania visitors participated in these activities statewide (97.4%). The majority of the respondents liked to dine in family restaurants (75.2%) and cafés/coffee houses (62.9%). Four out of ten respondents indulged in fine dining (44.3%). A fairly low percentage prepared their own meals (23.3%).

Shopping: Statewide, most Oceania visitors participated in shopping (97.1%). While on O'ahu, eight out of ten respondents shopped in department stores (83.8%). Other popular venues on O'ahu included convenience stores (64.8%), local shops/ artisans (56.9%), discount/outlets (52.2%), supermarkets (48.4%) and hotel stores (43.8%).

Sightseeing: while on O'ahu, fewer Oceania visitors went on self-guided tours (48.9%) than other visitor groups while a higher percentage of respondents went on limos/ van tours/ tour buses (38.7%).

Recreation: While on O'ahu, most respondents went swimming/sunbathing/beach (82.3%). Running/ jogging/ fitness walk (28.2%) and visiting state parks/botanical gardens (27.7%) were also popular activities with this group.

Historical and cultural activities: Eight out of ten European visitors participated in culture activities statewide (76.4%). While on O'ahu, over half of these visitors went to historic military sites (55.8%). Some also visited other historical sites (27.7%) or saw a Polynesian shows/ hula shows (26.1%).

Transportation: While on O'ahu, the majority of Oceania respondents used airport shuttles (65.5%). More also used tour buses/vans (47.7%), taxis/limousines (44%) and public buses (38.4%) compared to visitors from other markets. Usage of rentals cars (23.9%) were fairly low.

TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. There were no significant changes in trip planning behaviors of 2015 respondents compared to respondents in 2014. Japanese visitors typically decide to take a vacation and conduct their trip planning in a relatively short time. Visitors from U.S. West, U.S. East, Canada, Europe, and Oceania tend to plan farther in advance.

**Figure 16: Trip Decision Making - U.S. West
(Percent of visitors for each response, 2015)**

| | 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 | 3.8% | 22.3% | 10.4% | 35.7% | 25.0% | 2.8% | N/A |
| Decide to visit Hawai'i | 4.0% | 22.8% | 9.9% | 33.7% | 25.8% | 3.7% | N/A |
| Decide on which islands to visit | 3.0% | 19.9% | 10.5% | 34.4% | 28.7% | 3.5% | 8.3% |
| Set date for the trip | 1.5% | 15.8% | 10.2% | 34.3% | 34.0% | 4.2% | 10.7% |
| Choosing a place to stay | 1.5% | 14.1% | 10.9% | 31.0% | 37.5% | 5.0% | 11.0% |
| Make airline reservations | 0.4% | 5.6% | 9.2% | 36.6% | 43.3% | 4.8% | 10.9% |
| Purchase tickets | 0.4% | 5.4% | 8.7% | 36.5% | 44.1% | 4.9% | 10.5% |
| Make accommodation reservations | 1.4% | 12.1% | 10.1% | 30.9% | 40.0% | 5.4% | 10.0% |
| Make rental car reservations | 0.2% | 4.7% | 6.1% | 25.1% | 56.5% | 7.3% | 13.7% |
| Purchase tour or attraction packages | 0.0% | 2.0% | 3.5% | 16.9% | 57.1% | 20.6% | 34.2% |

U.S. West

- Seven out of ten U.S. West visitors in 2015 decided to take a vacation (72.2%), to visit Hawai'i (70.4%), and decided on the islands they wanted to visit (67.8%) four months or more before arrival.
- Over half (56.5%) of U.S. West visitors made rental car reservations, and about 40 percent made airline reservations (43.3%), purchased airline tickets (41.1%) and reserved accommodations (40%) one to three months before arriving in the islands.
- Close to 57 percent purchased tour or attraction packages one to three months out, but 20.6 percent waited until less than one month before arrival. Additionally, 34.2 percent purchased packaged tours during their trip.

**Figure 17: Trip Decision Making - U.S. East
(Percent of visitors for each response, 2015)**

| | 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 | 6.8% | 27.9% | 12.1% | 30.3% | 20.6% | 2.4% | N/A |
| Decide to visit Hawai'i | 6.9% | 25.0% | 12.8% | 31.4% | 20.7% | 3.2% | N/A |
| Decide on which islands to visit | 4.5% | 20.8% | 13.1% | 32.0% | 26.1% | 3.5% | 8.9% |
| Set date for the trip | 2.3% | 18.4% | 12.7% | 34.4% | 28.3% | 3.8% | 9.8% |
| Choosing a place to stay | 2.6% | 15.1% | 12.4% | 33.1% | 32.1% | 4.8% | 9.6% |
| Make airline reservations | 0.3% | 7.9% | 12.1% | 36.7% | 38.1% | 4.8% | 11.0% |
| Purchase tickets | 0.3% | 7.3% | 12.1% | 35.9% | 39.5% | 4.9% | 11.0% |
| Make accommodation reservations | 1.5% | 13.2% | 12.5% | 33.0% | 34.8% | 5.0% | 10.0% |
| Make rental car reservations | 0.4% | 4.1% | 7.8% | 28.8% | 51.3% | 7.6% | 15.0% |
| Purchase tour or attraction packages | 0.4% | 3.3% | 3.7% | 18.7% | 59.4% | 14.5% | 38.1% |

U.S. East

- A higher percentage of U.S. East visitors started trip planning earlier than their U.S. West counterparts. In 2015, four out of ten U.S. East visitors decided on a vacation (46.7%), to visit Hawai'i (44.8%) and decided on the islands they wanted to visit (38.5%) at least seven months before arrival.
- Four out of ten visitors made airlines reservations (38.1%) and purchased tickets (39.5%) one to three months before arrival.
- Over half U.S. East visitors made rental car reservations (59%) three months or less before the trip.
- Close to 60 percent purchased tour or attraction packages within one to three months of arrivals, but 14.5 percent waited until less than one month before arrival. In addition, 38.1 percent purchased tour packages while on their trip.

**Figure 18: Trip Decision Making - Japan
(Percent of visitors for each response, 2015)**

| | 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 | |
| Decision: Vacation/ Pleasure trip | 1.4% | 15.5% | 5.7% | 33.4% | 39.7% | 4.2% | N/A |
| Decision: Visit Hawaii | 1.4% | 15.3% | 6.0% | 32.1% | 41.1% | 4.1% | N/A |
| Decisions: Which island to visit | 1.2% | 12.8% | 5.9% | 32.3% | 43.3% | 4.6% | 5.3% |
| Travel dates | 0.6% | 9.2% | 6.1% | 30.7% | 47.9% | 5.5% | 10.1% |
| Accommodations- where to stay | 0.3% | 5.6% | 5.6% | 28.4% | 54.1% | 6.1% | 4.3% |
| Airline reservations | 0.5% | 7.3% | 5.6% | 27.1% | 53.2% | 6.3% | 4.7% |
| Purch airline tickets | 0.3% | 4.8% | 5.2% | 25.0% | 57.0% | 7.6% | 3.4% |
| Accommodation- reservations | 0.3% | 7.1% | 6.0% | 25.9% | 54.3% | 6.4% | 3.4% |
| Rental car reservations | 0.6% | 1.7% | 2.2% | 12.9% | 63.8% | 18.8% | 4.7% |
| Purch tour/ attraction pkg | 0.3% | 0.9% | 1.3% | 11.4% | 67.9% | 18.1% | 20.5% |

Japan

- Japanese visitors continued to have a shortest planning and booking window among the visitors surveyed. Most of their travel decisions were made between 1 to 3 months before the vacation date.
- Three months or less before their arrival, 43.9 percent of Japanese respondents decided to take a vacation, 45.2 percent decided to visit Hawai'i, 47.9 percent decided on the islands they wanted to visit and 53.3 percent settled on the dates of travel.
- Also within three months of their trip, the majority of Japanese visitors made airline reservations (59.6%), purchased airline tickets (64.7%), and made accommodation reservations (60.7%).
- Less than a month before arriving in Hawai'i, 18.8 percent of Japanese visitors made rental car reservations, and 18.1 percent purchased tour and attraction packages. About 20 percent also purchased tour packages during their trip.

**Figure 19: Trip Decision Making - Canada
(Percent of visitors for each response, 2015)**

| | 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% | 24.9% | 11.2% | 33.0% | 23.3% | 2.4% | N/A |
| Decide to visit Hawai'i | 5.2% | 23.0% | 10.5% | 32.2% | 26.2% | 2.8% | N/A |
| Decide on which islands to visit | 3.6% | 19.1% | 11.7% | 32.5% | 29.9% | 3.2% | 10.3% |
| Set date for the trip | 2.6% | 17.9% | 11.1% | 32.0% | 33.1% | 3.4% | 12.7% |
| Choosing a place to stay | 1.9% | 14.4% | 10.2% | 30.6% | 38.3% | 4.5% | 13.2% |
| Make airline reservations | 0.3% | 7.9% | 10.8% | 35.3% | 41.8% | 3.9% | 12.2% |
| Purchase tickets | 0.4% | 7.5% | 10.8% | 34.9% | 42.3% | 4.1% | 11.9% |
| Make accommodation reservations | 1.5% | 13.3% | 10.6% | 30.2% | 39.2% | 5.1% | 13.1% |
| Make rental car reservations | 0.2% | 5.5% | 5.7% | 25.8% | 55.3% | 7.5% | 19.1% |
| Purchase tour or attraction packages | 0.5% | 3.2% | 1.6% | 11.6% | 61.1% | 22.0% | 47.2% |

Canada

- Canadian visitors' trip planning patterns were similar to those of U.S. East visitors. At least seven months before arrival, four out of ten Canadian visitors decided on a vacation (41.3%) decided to visit Hawai'i (38.7%) and decided on which islands to visit (34.4%).
- Four out of ten Canadian visitors purchased airline tickets (42.3%), made airline reservations (41.8%) and reserved accommodations (39.2%) one to three months before their trip.
- Over half of the respondents made rental car reservations (55.3%) between one to three months prior. Some waited until less than one month of arrival (7.5%) to reserve their rental cars.
- The majority (61.1%) of Canadian visitors purchased tour or attraction packages within one to three months of arrivals, while 22 percent waited until less than one month before their arrivals. In addition, 47.2 percent purchased tour packages while they were on their trip.

**Figure 20: Trip Decision Making - Europe
(Percent of visitors for each response, 2015)**

| | 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 | 4.6% | 23.7% | 16.1% | 36.2% | 16.5% | 2.8% | N/A |
| Decide to visit Hawai'i | 4.8% | 21.5% | 17.6% | 34.5% | 18.7% | 3.0% | N/A |
| Decide on which islands to visit | 1.9% | 14.8% | 15.7% | 38.6% | 25.6% | 3.4% | 11.7% |
| Set date for the trip | 1.4% | 14.6% | 15.6% | 38.9% | 25.8% | 3.7% | 9.4% |
| Choosing a place to stay | 0.8% | 9.5% | 14.3% | 36.5% | 34.3% | 4.6% | 13.8% |
| Make airline reservations | 0.6% | 9.9% | 16.5% | 38.7% | 29.8% | 4.5% | 11.1% |
| Purchase tickets | 0.4% | 9.2% | 16.1% | 38.2% | 31.3% | 4.9% | 10.9% |
| Make accommodation reservations | 0.5% | 7.3% | 13.8% | 36.4% | 36.4% | 5.6% | 12.4% |
| Make rental car reservations | 0.3% | 5.7% | 10.8% | 31.3% | 44.3% | 7.6% | 21.5% |
| Purchase tour or attraction packages | 0.4% | 3.2% | 6.5% | 24.0% | 47.0% | 18.9% | 50.3% |

Europe

- The planning profile among European visitors showed that many took between 4 to 6 months to decide to take a vacation (36.2%), decide to visit Hawai'i (34.5%), and decide on the islands they wanted to visit (38.6%).
- A third of these visitors reserved their accommodations (36.4%) and purchased airline tickets (31.3%) between one to three months before their trip.
- More than 40 percent of European visitors made rental car reservations within one to three months, while a few (7.6%) waited until less than one month prior to arrival.
- Close to half of the visitors purchased tour and attraction packages between one to three months prior to arriving while 18.9 percent waited until less than a month before their trip. Half of the visitors from Europe purchased tour and attraction packages during their trip (50.3%).

**Figure 21: Trip Decision Making - Oceania
(Percent of visitors for each response, 2015)**

| | 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 | 7.0% | 27.8% | 14.2% | 35.8% | 14.6% | 0.6% | N/A |
| Decide to visit Hawai'i | 5.9% | 24.4% | 15.8% | 35.4% | 17.7% | 0.8% | N/A |
| Decide on which islands to visit | 4.2% | 21.1% | 15.2% | 37.7% | 20.4% | 1.4% | 8.8% |
| Set date for the trip | 3.4% | 20.8% | 16.4% | 37.1% | 21.4% | 1.0% | 7.9% |
| Choosing a place to stay | 1.2% | 11.7% | 13.3% | 39.9% | 31.9% | 2.1% | 9.1% |
| Make airline reservations | 0.8% | 14.1% | 17.7% | 39.1% | 26.1% | 2.1% | 7.3% |
| Purchase tickets | 0.9% | 13.0% | 17.1% | 40.2% | 26.8% | 2.1% | 7.3% |
| Make accommodation reservations | 0.7% | 9.7% | 14.0% | 40.0% | 33.4% | 2.2% | 8.4% |
| Make rental car reservations | 0.0% | 7.1% | 6.8% | 26.4% | 43.6% | 16.1% | 20.0% |
| Purchase tour or attraction packages | 0.2% | 6.2% | 7.9% | 28.8% | 40.8% | 16.1% | 51.6% |

Oceania

- Oceania visitors showed a longer planning and booking window compared to other visitor groups. Close to half of these visitors took 7 months or longer to decide on a vacation (49%) and to visit Hawai'i (46%).
- About 40 percent of visitors made airline reservations, purchased airline tickets, and reserved accommodations between four to six months before their trip.
- Four out of ten visitors made rental car reservations (43.6%) within one to three months, while some (16.1%) waited until less than one month before their arrival.
- Close to 40 percent of Oceania visitors purchased tour or attraction packages between one to three months out, while 16.1 percent waited until less than a month before their trip. Half of the respondents purchased tour and attraction packages during their trip (51.6%).

Sources of Information Used to Plan Trip

Visitors to Hawai'i use a wide variety of resources to plan their trip to the islands. Figure 22 shows the sources of information utilized by 2015 visitors from each market. There were some similarities across most visitor markets, such as the heavy reliance on personal experience and recommendation from friends or relatives for information prior to their trip. While their trip was in progress, most visitors used personal experience, information provided by hotels and resorts, and smartphones or tablets apps relevant to their trip. Usage of other resources varied by visitor markets.

U.S. West

Many U.S. West respondents in 2015 relied on their personal experience (58.1%) and recommendations from friends and relatives (41.3%) in planning their trip to Hawai'i prior to departure. Information from airlines (35.7%), online travel booking sites (35.4%), information from hotels and resorts (33.2%), and webpages or blogs covering Hawai'i (27.2%) were also heavily utilized. Only 12.1 percent sought assistance from travel agents, the lowest among the visitor markets.

**Figure 22: Sources of Information Used for Trip Planning
(Percentage of Total Visitors by MMA, 2015)**

| | | MMA | | | | | |
|---|----------|-----------|-----------|-------|--------|--------|---------|
| | | U.S. West | U.S. East | Japan | Canada | Europe | Oceania |
| Travel Agents | Before | 12.1% | 20.2% | 56.3% | 19.3% | 40.4% | 65.2% |
| | During | 1.3% | 2.6% | 10.1% | 2.7% | 5.8% | 3.7% |
| | Not used | 87.1% | 78.6% | 41.1% | 78.8% | 55.9% | 33.3% |
| Companies specializing in packaged tours | Before | 11.2% | 16.0% | 23.1% | 12.5% | 17.1% | 15.2% |
| | During | 8.4% | 11.7% | 6.4% | 16.0% | 13.5% | 18.5% |
| | Not used | 81.8% | 75.8% | 72.5% | 74.3% | 71.2% | 68.4% |
| Information from airline/ commercial carriers | Before | 35.7% | 36.8% | 21.1% | 42.2% | 41.1% | 36.7% |
| | During | 2.8% | 2.9% | 3.5% | 3.5% | 8.1% | 3.5% |
| | Not used | 63.3% | 62.2% | 76.6% | 56.3% | 54.4% | 60.9% |
| Information from hotels/ resorts | Before | 33.2% | 37.1% | 21.2% | 38.4% | 41.3% | 42.3% |
| | During | 13.6% | 17.4% | 15.8% | 16.4% | 22.4% | 24.0% |
| | Not used | 58.1% | 52.2% | 66.5% | 51.1% | 42.7% | 39.7% |
| Personal experience | Before | 58.1% | 48.5% | 35.1% | 53.4% | 34.9% | 35.1% |
| | During | 30.3% | 25.7% | 8.1% | 28.0% | 25.3% | 17.5% |
| | Not used | 35.8% | 45.6% | 62.4% | 39.9% | 52.6% | 55.9% |
| Recommendations from Friends or Relatives | Before | 41.3% | 48.6% | 27.8% | 46.4% | 41.6% | 45.6% |
| | During | 21.4% | 21.3% | 5.5% | 14.6% | 16.4% | 9.1% |
| | Not used | 51.8% | 45.6% | 69.4% | 49.3% | 51.2% | 50.7% |
| Online travel booking site | Before | 35.4% | 37.3% | 35.1% | 51.8% | 49.1% | 39.6% |
| | During | 4.9% | 5.7% | 3.5% | 8.3% | 11.6% | 6.0% |
| | After | 3.5% | 3.3% | 6.2% | 6.6% | 8.4% | 4.4% |
| | Not used | 61.7% | 60.2% | 61.5% | 45.0% | 44.4% | 56.0% |
| Online webpage or blog covering Hawai'i | Before | 27.2% | 34.6% | 42.5% | 43.5% | 48.8% | 35.4% |
| | During | 10.8% | 13.0% | 9.8% | 16.7% | 18.3% | 9.7% |
| | After | 5.2% | 4.3% | 12.1% | 9.0% | 12.3% | 5.1% |
| | Not used | 67.6% | 61.3% | 53.3% | 50.7% | 43.3% | 59.3% |
| Online social networking site | Before | 8.0% | 8.6% | 8.3% | 11.3% | 17.5% | 10.4% |
| | During | 4.5% | 4.6% | 3.1% | 5.4% | 9.1% | 5.2% |
| | After | 3.9% | 4.8% | 3.9% | 6.2% | 8.6% | 4.6% |
| | Not used | 87.8% | 87.2% | 89.5% | 83.5% | 75.3% | 84.8% |
| Smartphone or tablet applications relevant to your trip | Before | 15.5% | 15.6% | 16.8% | 16.6% | 20.5% | 13.9% |
| | During | 18.4% | 18.5% | 11.0% | 18.6% | 26.8% | 12.6% |
| | After | 4.3% | 5.0% | 4.7% | 5.8% | 7.3% | 4.0% |
| | Not used | 73.7% | 74.0% | 76.0% | 72.4% | 63.6% | 78.2% |
| Hawai'i Visitors Bureaus website | Before | 14.6% | 22.7% | 15.9% | 23.9% | 24.0% | 18.3% |
| | During | 5.4% | 7.3% | 2.4% | 11.2% | 13.8% | 9.8% |
| | After | 2.3% | 3.2% | 3.9% | 4.8% | 5.4% | 2.6% |
| | Not used | 81.5% | 73.6% | 81.4% | 68.9% | 65.6% | 73.8% |
| Magazines | Before | 8.9% | 10.8% | 47.7% | 10.1% | 16.9% | 10.6% |
| | During | 10.8% | 11.8% | 18.9% | 17.9% | 19.6% | 10.6% |
| | After | 2.6% | 2.5% | 10.5% | 4.3% | 5.8% | 2.1% |
| | Not used | 81.6% | 79.8% | 44.7% | 74.9% | 67.0% | 80.4% |
| Newspapers | Before | 2.3% | 2.7% | 4.4% | 2.7% | 5.9% | 5.4% |
| | During | 5.3% | 5.7% | 2.2% | 8.6% | 11.3% | 5.9% |
| | After | .9% | .9% | .6% | 1.5% | 2.6% | .7% |
| | Not used | 92.4% | 92.1% | 93.6% | 89.0% | 83.2% | 89.3% |
| Books | Before | 18.1% | 25.3% | 40.0% | 28.1% | 45.6% | 12.9% |
| | During | 11.9% | 14.8% | 13.5% | 20.0% | 29.0% | 5.7% |
| | After | 3.4% | 4.5% | 7.2% | 6.1% | 11.4% | 1.0% |
| | Not used | 77.6% | 70.3% | 56.2% | 64.8% | 47.3% | 83.6% |

While their trip is in progress, U.S. West visitors relied on personal experience (30.3%), friends and relatives (21.4%), smartphone or tablet apps (18.4%), information from hotels and resorts (13.6%), guide books (11.9%), online webpages or blogs (10.8%) and magazines (10.8%) to find information about Hawai'i. After their trip was over, 5 percent of the respondents viewed online webpages or blogs to follow Hawai'i.

U.S. East

Before coming to the islands, U.S. East visitors relied heavily on recommendations from friends and relatives (48.6%) and personal experience (48.5%) in their trip planning. Online travel booking sites (37.3%), information from hotels and resorts (37.1%), information from airlines (36.8%), and online webpages or blogs (34.6%) were also popular resources.

During their trip, U.S. East visitors relied on personal experience (25.7%), friends and relatives (21.3%), smartphone or tablet apps (18.5%), information from hotels and resorts (17.4%), guide books (14.8%), online webpages or blogs (13%) and companies specializing in packaged tours (11.7%). After their trip, about 5 percent of the respondents used smart phone/tablet apps and social media sites for additional information about Hawai'i.

Japan

These visitors relied less on personal experience or recommendations from friends and relatives but relied more on travel agents (56.3%) in trip planning compared to U.S. and Canadian visitors. Magazines (47.7%), online webpages or blogs (42.5%) and guide books (40%) were also popular with Japanese visitors in their trip planning. Japanese visitors were less likely to use information from airlines (21.2%) compared to other visitor groups.

During the trip, Japanese visitors used magazines (18.9%), information from hotels and resorts (15.8%), guide books (13.5%) and smartphones or tablets apps (11%) to access information about Hawai'i. Some Japanese visitors continued to seek information about Hawai'i after their trip through webpages or blogs (12.1%) and magazines (10.5%).

Canada

Canadian respondents in 2015 relied most heavily on personal experience (53.4%) and online travel booking sites (51.8%) when planning for their trip. In addition, many Canadians used recommendations from friends or relatives (46.4%), online webpages or blogs (43.5%), information from airlines (42.2%), and information from hotels and resorts (38.4%). Only 19.3 percent used travel agents.

While their trip was in progress, many Canadian visitors used personal experience (28%), guide books (20%), smartphones or tablets apps (18.6%), magazines (17.9%), online webpages or blogs (16.7%), information from hotels and resorts (16.4%) and packaged tour companies (16%) as resources.

Europe

Online travel booking sites (49.1%) and online webpages or blogs (48.8%) were the most frequently used sources among European visitors in 2015 for trip planning. Guide books (45.6%), recommendations from friends and relatives (41.6%), information from hotels and resorts (41.3%), information from airlines (41.1%) and travel agents (40.4%) were also heavily used.

Many European visitors used guide books (29%) and smartphones or tablets apps (26.8%) as resources during their trip. A few European visitors continued to seek information about Hawai'i after their trip using online webpages or blogs (12.3%).

Oceania

The majority of visitors from Oceania used travel agents (65.2%) for trip planning before coming to Hawai'i. Recommendations from family and friends (45.6%), information from hotels and resorts (42.3%), online travel booking sites (39.6%), information from airlines (36.7%) and online webpages or blogs (35.4%) were also important planning tools for these visitors.

During their trip, many visitors from Oceania used information from hotels or resorts (24%) and package tour companies (18.5%) as resources about Hawai'i.

Ways Visitors Used Sources of Information

The 2015 VSAT survey gathered information on different uses for five important information sources (Internet, guide books, mobile phones and tablets, friends and relatives, and travel agents).

Internet: Among U.S. West, U.S. East, Canadian, European and Oceania visitors in 2015, the Internet was the dominant source of trip planning information. These visitors heavily used the Internet to decide on their vacation destination, estimate cost of trip, find places to shop, make rental car reservation and for airport check in.

Japanese visitors' use of the Internet for trip planning was lower compared to the other markets. The most popular searches were to find restaurants, find places to shop, check the weather, access maps and directions and plan activities.

Smart phones and tablets: Across all markets, the majority of visitors used smartphones and tablets to access maps and directions and check the weather. Some used smartphones and tablets for airport check-in, to find restaurants and find places to shop.

Guide books: Visitors relied on guide books to plan activities, find places to shop or dine, and for maps and directions.

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 23: How Sources of Information Were Used by Visitor Market
(Percentage of visitors by MMA, 2015)**

| | Major Market Areas | | | | | |
|---------------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Accessing maps and directions / GPS | | | | | | |
| Internet | 42.0% | 48.7% | 46.4% | 55.0% | 47.3% | 40.9% |
| Guide Books | 33.0% | 31.3% | 60.7% | 42.2% | 33.6% | 36.9% |
| Mobile Phone, Tablet Apps | 78.0% | 70.7% | 63.9% | 61.5% | 64.5% | 60.0% |
| Friends,Family | 12.9% | 15.1% | 20.0% | 12.4% | 10.5% | 6.3% |
| Travel Agent | 8.2% | 6.2% | 12.2% | 9.0% | 7.2% | 4.7% |
| Airport check-in | | | | | | |
| Internet | 67.6% | 68.7% | 36.2% | 70.1% | 63.3% | 49.7% |
| Guide Books | 0.8% | 0.3% | 7.4% | 0.4% | 0.3% | 0.7% |
| Mobile Phone, Tablet Apps | 47.2% | 46.0% | 14.5% | 39.0% | 33.9% | 26.6% |
| Friends,Family | 4.7% | 6.5% | 13.0% | 4.6% | 5.2% | 5.0% |
| Travel Agent | 20.2% | 18.8% | 42.6% | 21.8% | 24.8% | 28.2% |
| Checking the weather | | | | | | |
| Internet | 52.7% | 55.0% | 52.9% | 67.3% | 60.8% | 54.5% |
| Guide Books | 2.6% | 3.1% | 5.1% | 3.0% | 4.4% | 4.6% |
| Mobile Phone, Tablet Apps | 83.5% | 84.5% | 67.4% | 78.8% | 80.3% | 76.9% |
| Friends,Family | 6.0% | 7.0% | 6.1% | 3.8% | 5.1% | 3.7% |
| Travel Agent | 5.0% | 2.5% | 4.5% | 4.5% | 3.8% | 3.4% |
| Choosing an airline | | | | | | |
| Internet | 80.3% | 71.8% | 37.0% | 78.9% | 57.9% | 43.5% |
| Guide Books | 0.9% | 0.8% | 1.9% | 0.5% | 1.4% | 0.6% |
| Mobile Phone, Tablet Apps | 6.0% | 6.1% | 6.5% | 6.0% | 4.4% | 4.1% |
| Friends,Family | 14.6% | 16.4% | 23.9% | 14.4% | 11.6% | 12.3% |
| Travel Agent | 46.0% | 53.7% | 74.3% | 52.5% | 72.2% | 78.4% |
| Deciding on your vacation destination | | | | | | |
| Internet | 49.6% | 45.5% | 39.4% | 58.9% | 56.5% | 49.5% |
| Guide Books | 16.8% | 22.8% | 18.0% | 19.6% | 31.6% | 14.0% |
| Mobile Phone, Tablet Apps | 5.8% | 5.0% | 11.3% | 7.3% | 5.6% | 7.9% |
| Friends,Family | 58.3% | 61.6% | 56.0% | 60.3% | 60.4% | 55.7% |
| Travel Agent | 27.5% | 34.1% | 63.3% | 26.3% | 41.6% | 50.9% |
| Estimating the costs of your trip | | | | | | |
| Internet | 52.9% | 55.0% | 25.0% | 65.2% | 53.7% | 52.3% |
| Guide Books | 4.8% | 7.4% | 3.7% | 7.9% | 10.2% | 5.3% |
| Mobile Phone, Tablet Apps | 4.7% | 4.8% | 5.1% | 3.8% | 5.3% | 3.9% |
| Friends,Family | 15.7% | 17.7% | 18.8% | 17.9% | 12.5% | 12.6% |
| Travel Agent | 25.1% | 34.1% | 64.9% | 23.4% | 44.4% | 43.6% |
| Finding places to shop | | | | | | |
| Internet | 36.9% | 40.6% | 53.5% | 47.6% | 45.8% | 46.2% |
| Guide Books | 38.1% | 38.7% | 72.0% | 42.3% | 44.7% | 50.6% |
| Mobile Phone, Tablet Apps | 30.0% | 24.5% | 49.6% | 23.7% | 31.7% | 29.3% |
| Friends,Family | 38.6% | 39.7% | 38.6% | 32.8% | 29.6% | 45.2% |
| Travel Agent | 6.0% | 7.0% | 10.3% | 8.7% | 5.4% | 6.8% |
| Finding restaurants | | | | | | |
| Internet | 53.5% | 55.1% | 57.4% | 59.0% | 53.9% | 48.8% |
| Guide Books | 60.2% | 57.5% | 65.7% | 57.8% | 58.6% | 52.3% |
| Mobile Phone, Tablet Apps | 50.3% | 44.0% | 45.8% | 36.5% | 47.6% | 35.7% |
| Friends,Family | 58.7% | 57.4% | 44.9% | 48.2% | 41.7% | 46.1% |
| Travel Agent | 10.6% | 12.4% | 16.4% | 10.2% | 6.0% | 5.6% |

Figure 23: How Sources of Information Were Used by Visitor Markets (Continued)
(Percentage of visitors by MMA, 2015)

| | Major Market Areas | | | | | |
|--|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Making airline reservations | | | | | | |
| Internet | 84.7% | 73.7% | 35.5% | 80.5% | 56.5% | 40.6% |
| Guide Books | 0.6% | 0.7% | 0.7% | 0.9% | 1.1% | 0.4% |
| Mobile Phone, Tablet Apps | 8.8% | 8.0% | 5.4% | 7.5% | 6.0% | 3.5% |
| Friends,Family | 12.1% | 12.4% | 15.2% | 9.1% | 8.4% | 6.0% |
| Travel Agent | 47.8% | 57.5% | 79.7% | 55.3% | 74.2% | 82.3% |
| Making car rental reservations | | | | | | |
| Internet | 68.2% | 60.6% | 21.2% | 70.0% | 49.8% | 26.9% |
| Guide Books | 1.4% | 2.1% | 2.0% | 2.8% | 2.2% | 4.5% |
| Mobile Phone, Tablet Apps | 5.3% | 7.0% | 3.3% | 6.8% | 4.7% | 4.9% |
| Friends,Family | 13.1% | 12.4% | 8.5% | 14.9% | 10.0% | 6.0% |
| Travel Agent | 41.1% | 37.7% | 7.8% | 27.3% | 41.0% | 11.7% |
| Making hotel or other lodging reservations | | | | | | |
| Internet | 64.5% | 59.4% | 33.9% | 71.8% | 58.8% | 55.6% |
| Guide Books | 3.5% | 5.3% | 2.4% | 6.2% | 6.3% | 2.5% |
| Mobile Phone, Tablet Apps | 5.9% | 5.4% | 4.8% | 5.9% | 8.8% | 6.2% |
| Friends,Family | 28.6% | 27.7% | 19.9% | 26.7% | 13.8% | 11.2% |
| Travel Agent | 48.5% | 55.9% | 75.3% | 36.8% | 59.4% | 62.5% |
| Planning activities | | | | | | |
| Internet | 57.4% | 60.5% | 42.2% | 66.3% | 65.4% | 62.7% |
| Guide Books | 63.0% | 65.7% | 26.8% | 64.9% | 67.3% | 39.7% |
| Mobile Phone, Tablet Apps | 18.4% | 18.1% | 14.2% | 20.6% | 21.0% | 15.8% |
| Friends,Family | 59.1% | 64.3% | 36.2% | 57.3% | 56.0% | 46.4% |
| Travel Agent | 23.8% | 28.0% | 36.5% | 20.7% | 20.5% | 22.8% |
| Purchasing any tour or attraction packages | | | | | | |
| Internet | 34.4% | 42.3% | 30.7% | 41.2% | 40.3% | 38.7% |
| Guide Books | 22.8% | 25.2% | 13.3% | 26.5% | 21.9% | 25.4% |
| Mobile Phone, Tablet Apps | 10.0% | 8.2% | 9.2% | 9.1% | 10.9% | 7.9% |
| Friends,Family | 17.9% | 21.0% | 15.3% | 15.7% | 16.2% | 12.7% |
| Travel Agent | 38.8% | 44.0% | 44.9% | 35.2% | 29.1% | 29.8% |
| Other trip planning | | | | | | |
| Internet | 1.5% | 1.4% | 3.0% | 1.3% | 1.4% | 1.4% |
| Guide Books | 0.9% | 0.8% | 1.8% | 0.2% | 0.3% | 0.1% |
| Mobile Phone, Tablet Apps | 0.7% | 0.8% | 1.5% | 0.9% | 0.9% | 0.3% |
| Friends,Family | 0.8% | 0.9% | 1.9% | 0.2% | 0.5% | 0.4% |
| Travel Agent | 1.9% | 1.1% | 1.7% | 1.1% | 1.3% | 0.8% |

Travel Agents: Visitors from Japan used travel agents more often than other resources for certain aspects of their trip planning. These included deciding on a vacation destination, estimating cost of trip, choosing an airline, making airlines and lodging reservations, purchasing tour packages and airport check in.

Visitors from Europe and Oceania also relied heavily on travel agents to choose their airlines, and to make airlines and lodging reservations.

SITUATIONS ENCOUNTERED

The 2015 VSAT Survey asked respondents if they encountered any of the following situations listed in Figure 24. Multiple responses were allowed.

**Figure 24: Situations Encountered While in Hawai'i
(Percentage of Visitors by MMA, 2015)**

| | Major Market Areas | | | | | |
|-----------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Did not have these experiences | 48.9% | 46.3% | 51.3% | 47.5% | 48.5% | 45.0% |
| Severe weather/natural calamities | 10.7% | 9.3% | 6.8% | 14.5% | 10.3% | 5.0% |
| Service problems | 3.2% | 2.8% | 6.5% | 3.2% | 3.7% | 4.5% |
| Parking ticket/auto violations | 1.3% | 1.3% | 2.5% | 1.2% | 1.6% | 0.4% |
| Safety Issues: | | | | | | |
| Verbal harassment | 2.0% | 2.1% | 1.3% | 1.7% | 1.8% | 1.9% |
| Solicited by drug dealers | 1.5% | 1.1% | 0.4% | 1.6% | 2.3% | 1.1% |
| Wallet/purse/valuables stolen | 1.1% | 0.6% | 1.2% | 0.7% | 0.9% | 0.8% |
| Car vandalized | 0.9% | 0.4% | 0.5% | 0.7% | 0.9% | 0.0% |
| Solicited by prostitutes | 0.7% | 0.9% | 0.6% | 0.7% | 0.9% | 0.6% |
| Physical violence/harm | 0.3% | 0.2% | 0.2% | 0.4% | 0.4% | 0.4% |
| Room vandalized/robbed | 0.3% | 0.1% | 0.2% | 0.1% | 0.1% | 0.2% |
| seeing homeless | 40.9% | 46.7% | 40.0% | 43.1% | 44.4% | 54.0% |

- Nearly half of the respondents from U.S. West, U.S. East, Canada, Europe and Oceania and 51.3 percent of Japanese respondents did not encounter any of these experiences while in the islands.
- Four out of ten respondents across all visitor markets said they saw homeless people. However, seeing the homeless was a not factor in their likelihood of returning to Hawai'i.
- Severe weather/natural calamities were issues for some visitors, particularly with 14.5 percent of Canadian respondents.
- Japanese visitors reported more issues with the level of service they received (6.5%) compared to other visitor groups. More Japanese respondents also received parking tickets (2.5%) than visitors from other markets.
- Very few visitors (less than 3 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 2015 Hawai'i visitors who participated in the VSAT survey.

U.S. West

- In 2015, the U.S. West was an older market as many of respondents were Seniors 55 years of age or over (41.3%), while Middle age visitors between 35 and 54 years were the second largest group (23%).
- Another large group of travelers were families (21.4%). The wedding/honeymoon segments comprised only 3.1 percent of U.S. West respondents in 2015.
- Most U.S. West visitors have been to Hawai'i before (81.2%), the highest percentage of repeat visitors among the major market areas.
- Many U.S. West visitors were affluent with 37.5 percent reporting household income between \$100,000 to \$199,999 and 20.3 percent with income over \$200,000.
- Two thirds of the respondents were employed while 26.1 percent were retirees.
- The majority of the respondents were educated with college (43.9%) and post graduate (30.7%) degrees.

U.S. East

- U.S. East respondents showed similar percentage age distribution as their U.S. West counterparts. Senior (42.8%) was also the largest segment, followed by Middle Age (23.1%) and Young (11.6%).
- Family groups comprised 17.1 percent of U.S. East respondents.
- Over half (59%) 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 38.4 percent reporting household income between \$100,000 to \$199,999, and 19.8 percent with income over \$200,000.
- Two thirds of the respondents were employed while 26.6 percent were retirees.
- The majority of the respondents held college (42.1%) and post graduate (36.4%) degrees.

Japan

- In 2015, over half of Japanese respondents were in the Senior (40.6%) and Middle Age (20.9%) segments.
- Many Japanese respondents traveled in Family groups (17.4%) or came for Wedding/Honeymoon (11.6%).
- Six out of ten Japanese respondents (60.7%) were Repeat Visitors to the islands.
- In 2015, 60.2 percent of Japanese respondents were employed and 14.5 percent were retirees. There continued to be more homemakers (16.6%) compared to the other visitor markets.
- Japanese visitors in 2015 were wealthy, with 20.5 percent reporting household income between 7.5 to 10 million yen, and 23.7 percent with income of 10 million yen or more.

- There were more high school graduates (27.5%) 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 (5.5%).

Canada

- Among Canadian respondents in 2015, Seniors (35.4%) were the largest segment followed by Middle Age (24.4%).
- More Canadian respondents came with Families (23.9%) compared to other visitor groups.
- Two out of three Canadian respondents were Repeat visitors (66.1%) to the islands.
- Similar to U.S. visitors, 70.9 percent of Canadian respondents were employed and 23.2 percent were retirees.
- Like U.S. East visitors, 38.3 percent of Canadian respondents reported income levels between \$100,000 and \$199,999 while 15.7 percent reported income of \$200,000 or more.
- Four out of ten respondents had earned a college degree, 27.6 percent had postgraduate degrees and 8.9 percent were high school graduates.

Europe

- Among European respondents in 2015, there were more Young visitors (24.4%) and fewer Senior visitors (24.8%) compared to the other markets.
- There were more Wedding/Honeymoon visitors (13.7%) and fewer Family visitors (8.6%) among European respondents than the other visitor groups.
- The majority of European respondents (69.3%) were First-Time visitors.
- Three out of four respondents were employed (76.4%), while 13.9 percent were retired.
- European respondents were less affluent than other visitor groups with 26.3 percent reporting income levels between \$100,000 and \$199,999 and 10.4 percent had income of \$200,000 or more.
- Three out of ten European respondents were college graduates (33.5%) and another 31.8 percent had postgraduate degrees.

Oceania

- Seniors (41.5%) comprised the largest group of respondents from Oceania, followed by Middle Age (22.1%).
- Many Oceania respondents came with Family groups (19.5%).
- Over of Oceania respondents (54.2%) were First-Time visitors.
- Seven out of ten respondents were employed while 22.1 percent were retired.
- Close to 36 percent of Oceania respondents reported income levels between \$100,000 and \$199,999 while 11.1 percent reported income of \$200,000 or more.
- A similar percentage of respondents had either a college degree (29.4%), post graduate degree (21.6%) or were high school graduates (21.1%).

Other Visitor Characteristics

Visitors were also asked about their traveling companions, travel history, if they had ever been a resident of Hawai'i, had friends or relatives living in the State, whether they own property in Hawai'i and the type of accommodations they stayed in.

U.S. West

- There were more females (51.6%) than males (48.4%) among U.S. West respondents in 2015. The median age of U.S. West respondents was 54 years old.
- Most of the U.S. West respondents (86.5%) had traveled on vacation more than 500 miles from home in the past three years. The top five places that they have visited were California (41.3%), Las Vegas (33.4%), Europe (24.9%), Mexico (19%) and Florida (18.8%).
- Half of these respondents had friends or relatives in Hawai'i, and 10.8 percent were previous Hawai'i residents. They were the most likely group to own property in Hawai'i (14.5%).
- The majority of U.S. West respondents traveled to the islands with their spouses (61.4%), 25.5 percent came with other adult family members, and 20.4 percent came with children. Additionally, 17.2 percent of U.S. West visitors came with friends/business associates.
- While on O'ahu, U.S. West visitors in 2015 stayed primarily in hotels (58.1%), as opposed to other types of accommodation. A higher percentage of U.S. West visitors on Maui stayed in condominiums (33.8%) than in hotels (31.8%). While visiting Hilo, these visitors stayed in hotels (28.1%) and at the homes of family or friends (18.3%). While on Kaua'i, a higher percentage U.S. West visitors stayed in timeshare properties (29.7%) than in hotels (28.3%).

U.S. East

- Just over half of the U.S. East respondents were male (52.3%). The median age was 54 years old.
- The majority (83.4%) of U. S. East respondents had taken a long distance trip of more than 500 miles from their homes in the past three years. Destinations they have visited included Florida (40.7%), California (32.9%), the Caribbean (26.9%), New York City (26.5%) and Europe (26.4%).
- Compared to their U.S. West counterparts, fewer U.S. East visitors previously lived in Hawai'i (6.9%), have friends and relatives who live in Hawai'i (39.2%) or own property in Hawai'i (8.2%).
- In 2015, the majority of U.S. East respondents came with their spouses (62.9%). Some came with other adult family members (24.4%), children (16.5%) and friends/business associates (14.7%).
- U.S. East respondents who went to O'ahu stayed primarily in hotels (64.8%) while 15.6 percent stayed with friends and family. While on Maui, the top two choices for lodging were hotels (42.9%) and condominiums (20.7%). On Kaua'i, 37 percent of U.S. East respondents stayed in hotels while 19.8 percent were in timeshares. On Hawai'i Island, 44.4 percent stayed in hotels and 17.8 percent stayed on cruise ships.

Japan

- More males (51.6%) than females (48.4%) responded to the survey in 2015. The median age was 53 years old.
- Compared to other visitor groups, a lower percentage of Japanese have taken a long distance trip of more than 500 miles in the past three years (65.5%). Those who did have gone to different parts of Japan (48.3%), Korea (17.5%), Guam/Saipan (13.1%) or Europe (12.2%).
- Very few Japanese respondents lived in Hawai'i previously (1.3%), but 15.4 percent have friends and/or relatives living in Hawai'i in 2015.
- A higher percentage of Japanese respondents owned timeshare properties (12.3%) in Hawai'i compared to respondents from other markets.
- Two out of three (66.2%) respondents came with their spouses, 32.3 percent came with adult family members, 17.9 percent were with children, and 16.1 percent were with friends/business associates.
- In 2015, hotels were the lodging of choice for Japanese visitors on O'ahu (79.6%), Hawai'i Island (64.9%) and Maui (51.4%). While on Kaua'i, 40.7 percent stayed in a hotel, 22.3 percent stayed on a cruise ship and 21.2 percent used condominium properties.

Canada

- There were more females (51.6%) than males (48.4%) among Canadian visitors surveyed in 2015. The median age was 52 years old.
- Nine out of ten respondents (90.1%) had taken a long distance trip of more than 500 miles in the past three years. Destinations included other parts of Canada (44.7%), Europe (33.3%), California (30.5%), Las Vegas (30.5%) and the Caribbean (26.2%).
- Only 1.9 percent had lived in Hawai'i before, but 19.9 percent have friends and/or relatives who live in the islands. Some own timeshare units (5.5%) or other types of property (2.5%) in Hawai'i.
- Seven out of ten respondents came with their spouses, 27.6 percent came with adult family members, 23.3 percent came with children, and 17.5 percent traveled with friends/business associates.
- The majority of respondents stayed in hotels (59.1%) while on O'ahu. Condominiums were the most popular choice (39.4%) during their time on Maui. On Kaua'i, a similar percentage of Canadians opted for timeshares (23.2%), hotels (22.1%) and vacation rental properties (20.7%).

Europe

- In 2015, over half (57.9%) of the European respondents were male. The median age was young than visitor groups at 43 years old.
- Most respondents (86.2%) had taken a long distance trip of more than 500 miles in the past three years. Many traveled to other parts of Europe (72.9%), California (42.3%), New York (32%) and Las Vegas (30.6%).
- Only 2.2 percent of the respondents lived in Hawai'i, but 18.5 percent have friends and relatives living in Hawai'i.

- About half of the respondents came with their spouses, 16.8 were with friends/business associates, 15.1 percent were with boyfriends/girlfriends, and 14.3 percent were with other adult family members
- European visitors preferred to stay in hotels, regardless of which island they visited.

Oceania

- Among survey respondents from Oceania, 58.6 percent were female and 41.4 percent were male. The median age was 53 years old.
- Most (85.2%) of these respondents had taken a long distance trip of more than 500 miles in the past three years. The top five destinations were other parts of Australia (47.9%), California (41.6%), Las Vegas (39.3%), New York (35.7%) and Europe (33.3%).
- Only 1 percent of the respondents have lived in Hawai'i before, and only 9.1 percent have friends and relatives who reside in the islands.
- Two out three respondents came with their spouses, 21.3 percent were with adult family members, 19.3 percent traveled with kids, and 17.9 percent came with friends/business associates.
- Most respondents stayed in hotels (87.6%) while on O'ahu, while 53.2 percent of the respondents stayed in hotels while on Maui. While visiting Hilo (47.1%) and Kaua'i (40.4%) four out of ten respondents stayed on cruise ships.

**Figure 25: 2015 Visitor Profile by Market
(Percentage of visitors by MMA 2015)**

| | Major Market Areas | | | | | |
|----------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| LIFESTYLE/LIFESTAGE | | | | | | |
| Wedding / Honeymoon | 3.1% | 5.3% | 11.6% | 4.1% | 13.7% | 4.2% |
| Family | 21.4% | 17.1% | 17.4% | 23.9% | 8.6% | 19.5% |
| Young | 11.1% | 11.6% | 9.5% | 12.2% | 24.4% | 12.7% |
| Middle Age | 23.0% | 23.1% | 20.9% | 24.4% | 28.5% | 22.1% |
| Seniors | 41.3% | 42.8% | 40.6% | 35.4% | 24.8% | 41.5% |
| VISITATION STATUS | | | | | | |
| First time | 18.8% | 41.0% | 39.3% | 33.9% | 69.3% | 54.2% |
| Repeat | 81.2% | 59.0% | 60.7% | 66.1% | 30.7% | 45.8% |
| EMPLOYMENT | | | | | | |
| Self-employed | 16.6% | 11.5% | 13.3% | 17.9% | 14.7% | 16.1% |
| Employed, for someone else | 51.1% | 56.2% | 46.9% | 53.0% | 61.7% | 56.7% |
| Retired | 26.1% | 26.6% | 14.5% | 23.2% | 13.9% | 22.1% |
| Student | 1.5% | 1.3% | 1.5% | 2.6% | 5.7% | 1.6% |
| Homemaker | 2.9% | 2.6% | 16.6% | 1.9% | 1.0% | 2.3% |
| Other | 1.8% | 1.8% | 7.1% | 1.4% | 3.0% | 1.1% |
| EDUCATION | | | | | | |
| No, some high school | 0.6% | 0.3% | 1.3% | 0.6% | 3.1% | 4.8% |
| High school grad | 4.7% | 5.6% | 27.5% | 8.9% | 15.2% | 21.1% |
| Some college | 15.9% | 12.5% | 5.6% | 13.0% | 8.1% | 8.9% |
| Vocational/technical | 4.2% | 3.1% | 9.4% | 11.1% | 8.2% | 14.3% |
| 2-year degree | 9.5% | 7.8% | 9.4% | 6.9% | 4.6% | 6.8% |
| 4-year degree | 34.4% | 34.3% | 41.2% | 31.9% | 28.9% | 22.6% |
| Post grad degree | 30.7% | 36.4% | 5.5% | 27.6% | 31.8% | 21.6% |

**Figure 26: 2015 Income by Visitor Market
(Percentage of visitors by MMA 2015)**

| INCOME (in U.S. \$) | US-West | US-East | Canada | Europe | Oceania | INCOME (in 10,000 Yen) | Japan |
|----------------------------|----------------|----------------|---------------|---------------|----------------|-------------------------------|--------------|
| Up to \$49,999 | 11.6% | 11.5% | 12.0% | 26.8% | 15.3% | Up to 349.999 | 13.8% |
| \$50K-\$69,999 | 10.2% | 11.1% | 12.2% | 16.9% | 16.2% | 350 to 549.999 | 22.2% |
| \$70K-\$99,999 | 20.3% | 19.2% | 21.8% | 19.6% | 21.5% | 550Y to 749.999 | 19.8% |
| \$100K-\$199,999 | 37.5% | 38.4% | 38.3% | 26.3% | 35.9% | 750 to 999.999 | 20.5% |
| \$200K+ | 20.3% | 19.8% | 15.7% | 10.4% | 11.1% | 1,000 or more | 23.7% |

Figure 27: 2015 Visitor Characteristics by Market³

| | Major Market Areas | | | | | |
|--|---------------------------|----------------|--------------|---------------|---------------|----------------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Gender | | | | | | |
| Male | 48.4% | 52.3% | 51.6% | 48.4% | 57.9% | 41.4% |
| Female | 51.6% | 47.7% | 48.4% | 51.6% | 42.1% | 58.6% |
| Age (Median Years) | 54 | 54 | 53 | 52 | 43 | 53 |
| Traveled 500+ miles in past 3 years | | | | | | |
| Yes | 86.5% | 83.4% | 65.5% | 90.1% | 86.2% | 85.2% |
| No | 13.5% | 16.6% | 34.5% | 9.9% | 13.8% | 14.8% |
| Lived in Hawaii | | | | | | |
| yes | 10.8% | 6.9% | 1.3% | 1.9% | 2.2% | 1.0% |
| no | 89.2% | 93.1% | 98.7% | 98.1% | 97.8% | 99.0% |
| Friends/Relatives in Hawaii | | | | | | |
| yes | 50.6% | 39.2% | 15.4% | 19.9% | 18.5% | 9.1% |
| no | 49.4% | 60.8% | 84.6% | 80.1% | 81.5% | 90.9% |
| Own Property in Hawaii | | | | | | |
| Yes, I own timeshare units | 10.7% | 6.3% | 12.3% | 5.5% | 1.0% | 0.7% |
| Yes, I own other types of property | 3.8% | 1.9% | 0.5% | 2.5% | 0.5% | 0.1% |
| No, but plan to in the future | 12.0% | 8.2% | 9.4% | 9.1% | 5.6% | 2.7% |
| No | 73.5% | 83.5% | 77.8% | 82.9% | 92.8% | 96.5% |
| Traveled to Hawaii with... | | | | | | |
| My spouse | 61.4% | 62.9% | 66.2% | 68.7% | 46.8% | 65.7% |
| My kids | 20.4% | 16.5% | 17.9% | 23.3% | 8.4% | 19.3% |
| My adult family members | 25.5% | 24.4% | 32.3% | 27.6% | 14.3% | 21.3% |
| My friends/associates | 17.2% | 14.7% | 16.1% | 17.5% | 16.8% | 17.9% |
| My girl/boy friend | 6.5% | 4.6% | 2.1% | 5.6% | 15.1% | 4.6% |
| Same sex partner | 1.4% | 1.4% | 0.2% | 1.1% | 2.0% | 1.2% |

³ Total for "Traveled to Hawai'i with..." sums to more than 100% due to multiple response.

**Figure 28: Places Visited in the Past Three Years
(Percentage of Visitors by MMA, 2015)**

| | Major Market Areas | | | | | |
|-----------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Traveled to... | | | | | | |
| Alaska | 10.7% | 8.4% | 8.1% | 5.7% | 3.4% | 10.4% |
| Australia | 4.0% | 3.7% | 5.5% | 5.5% | 10.9% | 47.9% |
| Bali | 1.0% | 0.8% | 4.8% | 1.8% | 4.8% | 15.0% |
| California | 41.3% | 32.9% | 3.8% | 30.5% | 42.3% | 41.6% |
| Canada | 16.1% | 17.1% | 3.6% | 44.7% | 15.8% | 22.1% |
| Caribbean | 13.3% | 26.9% | 0.5% | 26.2% | 15.7% | 5.5% |
| Central America | 6.3% | 6.5% | 2.3% | 7.3% | 5.7% | 3.4% |
| China | 3.1% | 3.4% | 9.5% | 5.3% | 7.8% | 8.3% |
| Europe | 24.9% | 26.4% | 12.2% | 33.3% | 72.9% | 33.3% |
| Fiji | 1.1% | 0.5% | 0.4% | 1.1% | 1.0% | 11.6% |
| Florida | 18.8% | 40.7% | 1.6% | 24.7% | 23.0% | 11.4% |
| Guam/Saipan | 0.6% | 0.6% | 13.1% | 0.5% | 0.2% | 0.7% |
| Japan | 3.5% | 3.6% | 48.3% | 2.5% | 5.8% | 6.0% |
| Korea | 1.7% | 1.6% | 17.5% | 2.3% | 1.9% | 1.9% |
| Las Vegas | 33.4% | 24.7% | 9.6% | 30.5% | 30.6% | 39.3% |
| Mexico | 19.0% | 15.5% | 0.9% | 24.9% | 7.7% | 6.5% |
| New York City | 17.2% | 26.5% | 2.5% | 17.5% | 32.0% | 35.7% |
| New Zealand | 2.5% | 1.8% | 1.7% | 2.8% | 6.9% | 23.2% |
| Other Asia | 5.9% | 4.9% | 14.1% | 6.5% | 14.9% | 15.3% |
| Other US States | 51.0% | 49.4% | 7.6% | 41.4% | 34.1% | 39.5% |
| South America | 5.3% | 7.2% | 2.5% | 5.9% | 8.1% | 4.4% |
| Thailand | 2.4% | 2.1% | 8.0% | 3.4% | 11.5% | 15.4% |
| Other | 14.5% | 13.9% | 14.0% | 15.3% | 18.4% | 15.3% |
| None | 8.8% | 8.7% | 13.3% | 3.2% | 2.8% | 3.3% |

**Figure 29: Accommodations by Visitor Market
(Percentage of Visitors by MMA, 2015)**

| | | Major Market Areas | | | | | |
|---------------|---------------------------|--------------------|---------|-------|--------|--------|---------|
| | | US West | US East | Japan | Canada | Europe | Oceania |
| OAHU | Hotel | 58.1% | 64.8% | 79.6% | 59.1% | 73.6% | 87.6% |
| | Condo | 8.1% | 6.6% | 10.2% | 14.6% | 6.7% | 6.2% |
| | B&B | 1.0% | 1.1% | 0.2% | 1.7% | 3.6% | 0.7% |
| | Timeshare | 9.3% | 8.0% | 10.0% | 8.1% | 1.4% | 1.7% |
| | Friend's/ Relative's home | 17.4% | 15.6% | 1.3% | 5.3% | 8.0% | 1.1% |
| | Home I own | 0.9% | 0.4% | 0.3% | 0.3% | 0.3% | 0.0% |
| | Cruise ship | 0.7% | 2.0% | 0.2% | 1.8% | 1.1% | 0.8% |
| | Vacation Rental | 11.0% | 7.2% | 0.6% | 15.8% | 6.6% | 4.5% |
| | Other | 2.8% | 2.4% | 0.4% | 3.3% | 5.2% | 1.2% |
| MAUI | Hotel | 31.8% | 42.9% | 51.4% | 26.4% | 56.8% | 53.2% |
| | Condo | 33.8% | 20.7% | 28.5% | 39.4% | 16.1% | 11.7% |
| | B&B | 1.3% | 1.8% | 0.0% | 1.3% | 8.7% | 1.7% |
| | Timeshare | 20.4% | 14.0% | 2.1% | 9.9% | 1.4% | 2.6% |
| | Friend's/ Relative's home | 6.8% | 4.8% | 4.0% | 3.0% | 3.7% | 2.4% |
| | Home I own | 1.3% | 0.3% | 0.0% | 1.4% | 0.1% | 0.0% |
| | Cruise ship | 2.8% | 12.0% | 11.4% | 7.8% | 4.8% | 21.5% |
| | Vacation Rental | 11.0% | 9.4% | 4.0% | 18.4% | 11.5% | 6.6% |
| | Other | 1.7% | 1.9% | 1.4% | 3.1% | 4.1% | 2.7% |
| HILO | Hotel | 28.1% | 26.1% | 63.1% | 24.5% | 42.9% | 26.3% |
| | Condo | 4.2% | 2.4% | 8.0% | 6.0% | 7.4% | 2.2% |
| | B&B | 6.6% | 9.6% | 4.4% | 11.0% | 20.4% | 9.8% |
| | Timeshare | 7.1% | 2.1% | 4.6% | 1.2% | 1.0% | 0.0% |
| | Friend's/ Relative's home | 18.3% | 7.5% | 2.6% | 4.9% | 3.9% | 3.9% |
| | Home I own | 1.8% | 0.6% | 2.6% | 0.6% | 0.4% | 0.0% |
| | Cruise ship | 14.7% | 36.4% | 10.9% | 31.3% | 8.3% | 47.1% |
| | Vacation Rental | 17.2% | 12.4% | 2.0% | 20.2% | 13.2% | 8.4% |
| | Other | 10.4% | 6.0% | 5.0% | 8.4% | 8.3% | 4.5% |
| KONA | Hotel | 36.7% | 43.3% | 62.0% | 29.3% | 59.2% | 50.2% |
| | Condo | 21.9% | 10.7% | 10.7% | 24.8% | 10.2% | 6.6% |
| | B&B | 2.5% | 2.4% | 1.0% | 3.2% | 11.1% | 1.8% |
| | Timeshare | 17.6% | 13.0% | 19.4% | 11.4% | 1.2% | 2.1% |
| | Friend's/ Relative's home | 8.3% | 4.8% | 2.0% | 5.0% | 2.0% | 1.8% |
| | Home I own | 2.3% | 0.8% | 0.0% | 1.8% | 0.5% | 0.0% |
| | Cruise ship | 4.9% | 20.0% | 4.0% | 12.0% | 6.7% | 30.8% |
| | Vacation Rental | 13.0% | 10.1% | 1.5% | 20.1% | 9.9% | 6.0% |
| | Other | 2.7% | 2.7% | 1.6% | 2.9% | 4.2% | 3.0% |
| HAWAII ISLAND | Hotel | 37.6% | 44.4% | 64.9% | 31.0% | 58.4% | 50.0% |
| | Condo | 20.1% | 10.0% | 10.8% | 23.7% | 11.2% | 6.7% |
| | B&B | 3.8% | 6.0% | 2.2% | 5.8% | 16.8% | 6.9% |
| | Timeshare | 16.9% | 11.7% | 16.4% | 10.7% | 1.4% | 1.8% |
| | Friend's/ Relative's home | 11.9% | 7.2% | 2.4% | 6.0% | 3.6% | 3.6% |
| | Home I own | 2.5% | 1.0% | 0.8% | 1.8% | 0.6% | 0.0% |
| | Cruise ship | 4.4% | 17.8% | 3.4% | 11.4% | 5.5% | 26.1% |
| | Vacation Rental | 15.6% | 12.9% | 1.4% | 23.0% | 13.8% | 8.0% |
| | Other | 4.1% | 4.0% | 2.3% | 4.4% | 6.4% | 3.3% |
| KAUAI | Hotel | 28.3% | 37.0% | 40.7% | 22.1% | 51.9% | 26.7% |
| | Condo | 21.8% | 12.1% | 21.2% | 18.3% | 14.2% | 5.9% |
| | B&B | 1.2% | 0.9% | 1.4% | 2.6% | 7.7% | 3.6% |
| | Timeshare | 29.7% | 19.8% | 10.0% | 23.2% | 3.6% | 6.2% |
| | Friend's/ Relative's home | 6.4% | 4.1% | 2.9% | 2.3% | 2.3% | 2.5% |
| | Home I own | 1.5% | 0.4% | 1.4% | 0.7% | 0.0% | 0.0% |
| | Cruise ship | 4.0% | 18.3% | 22.3% | 16.1% | 6.5% | 40.4% |
| | Vacation Rental | 17.3% | 10.9% | 4.3% | 20.7% | 13.1% | 9.3% |
| | Other | 2.6% | 2.2% | 1.4% | 4.8% | 6.8% | 5.4% |

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, 2015)**

| Primary Purpose of Trip | Major Market Areas | | | | | |
|-----------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Vacation | 63.4% | 56.1% | 65.2% | 76.3% | 67.9% | 84.8% |
| Visit friends/relatives | 8.5% | 11.3% | 1.2% | 3.3% | 5.1% | 1.9% |
| Attend/participate in wedding | 2.9% | 2.8% | 11.1% | 2.9% | 1.1% | 1.4% |
| Business meeting/conduct business | 5.9% | 5.8% | 1.1% | 1.4% | 1.4% | 0.3% |
| Honeymoon | 2.0% | 3.4% | 9.1% | 2.6% | 9.7% | 3.3% |
| Anniversary/birthday | 5.2% | 7.3% | 1.7% | 4.7% | 3.3% | 2.1% |
| Convention, conference, seminar | 2.7% | 4.1% | 1.0% | 2.4% | 3.2% | 0.5% |
| Family gathering/Reunion | 2.3% | 2.0% | 1.2% | 1.8% | 1.1% | 0.8% |
| Sports event | 1.5% | 1.0% | 2.2% | 1.2% | 1.2% | 0.2% |
| Get married | 0.5% | 0.6% | 1.7% | 0.5% | 1.1% | 0.0% |
| Incentive/reward | 0.7% | 1.3% | 1.2% | 1.0% | 1.6% | 0.1% |
| Shopping/fashion | 0.0% | 0.0% | 1.1% | 0.1% | 0.2% | 0.5% |
| Other | 2.0% | 2.6% | 1.1% | 0.9% | 1.2% | 1.0% |

- **U.S. West and U.S. East:** Over half of U.S. West and U.S. East visitors surveyed in 2015 listed vacation as the primary reason for coming to the islands. Some said their primary purpose was to visit friends/relatives, to celebrate an anniversary/birthday, to attend business meetings/conduct business and to attend a convention/conference/seminar.
- **Japan:** Vacation was the primary purpose for coming to Hawai'i among 65.2 percent of Japanese respondents. Close to 11 percent of Japanese respondents came to attend/participate in a wedding and 9 percent came to honeymoon.
- **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 (4.7%), visited friends/relatives (3.3%) or attended/participated in a wedding (2.9%).
- **Europe:** Vacation was also the primary reason for 67.9 percent of European respondents. About 10 percent came to honeymoon and 5 percent visited friends/relatives.
- **Oceania:** Most respondents from Oceania listed vacation as their primary purpose of trip while a few came to honeymoon (3.3%), celebrate an anniversary/birthday (2.1%), or visit friends/relatives (1.9%)

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, 2015)**

| Secondary Purpose(s) of Trip | Major Market Areas | | | | | |
|--|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Visit friends/relatives | 21.2% | 21.6% | 5.0% | 10.8% | 12.3% | 5.0% |
| Anniversary/birthday | 13.3% | 15.8% | 6.7% | 13.8% | 9.8% | 9.0% |
| Shopping/ fashion | 1.7% | 1.4% | 30.8% | 2.6% | 3.8% | 14.1% |
| Family Gathering/ Reunion/ Funeral | 8.4% | 6.9% | 5.6% | 8.0% | 3.1% | 3.9% |
| Attend a business meeting or conduct business | 8.0% | 7.6% | 2.0% | 2.0% | 2.5% | 0.6% |
| Attend/ participate in a wedding | 3.6% | 3.4% | 12.6% | 3.5% | 1.7% | 1.8% |
| Honeymoon | 2.5% | 4.6% | 10.7% | 3.5% | 12.0% | 4.0% |
| Attend a convention, conference or seminar | 3.6% | 5.2% | 1.6% | 3.2% | 4.7% | 0.7% |
| Real estate purchase or viewing | 3.7% | 2.5% | 1.7% | 1.7% | 0.9% | 0.3% |
| Attend/ participate in a sporting event | 2.3% | 1.9% | 3.4% | 2.1% | 2.8% | 0.6% |
| Incentive/ reward | 2.1% | 2.9% | 1.9% | 2.3% | 2.8% | 0.7% |
| Attend/ participate in a cultural/ historical/ music event | 1.9% | 2.0% | 1.7% | 1.3% | 1.9% | 1.6% |
| Other | 6.0% | 6.3% | 3.3% | 4.9% | 5.6% | 3.5% |

- For U.S. West and U.S. East respondents, visiting friends and relatives, celebrating an anniversary/birthday, attending a family gathering/reunion, and attending a business meeting/conduct business were mentioned as secondary purposes of trip.
- Among Japanese respondents, shopping/fashion was the prevailing secondary purpose of trip (30.8%), followed by attending/participating in a wedding (12.6%) and honeymooning in the islands (10.7%).
- For Canadian respondents, celebrating an anniversary/birthday (13.8%) and visiting friends and relatives (10.8%) were the two dominant secondary purpose of trip.
- Among European respondents, to visit with friends and relatives (12.3%) and to honeymoon (12%) were the most cited secondary purpose.
- For Oceania respondents, shopping/fashion (14.1%) was the prevailing secondary purpose of trip, followed by celebrating an anniversary/birthday (9%).

FACTOR 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 31.

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

| | Major Market Areas | | | | | |
|---|--------------------|---------|-------|--------|--------|---------|
| | US West | US East | Japan | Canada | Europe | Oceania |
| Natural Beauty/ Nature/ Scenery | 13.6% | 21.9% | 33.1% | 20.5% | 32.8% | 9.9% |
| Activities/ Attractions | 20.8% | 20.3% | 8.4% | 18.1% | 19.2% | 17.9% |
| Friendly/ Warm/ Hospitality/ Aloha Spirit | 12.5% | 16.4% | 15.2% | 17.9% | 19.8% | 28.9% |
| Weather | 13.5% | 12.8% | 14.8% | 19.1% | 7.9% | 16.6% |
| Beach/ Ocean | 10.8% | 7.4% | 16.0% | 13.2% | 9.6% | 9.1% |
| Event/ Celebration- friends/ family | 11.1% | 9.5% | 1.8% | 5.2% | 3.1% | 3.3% |
| Accommodations | 8.3% | 6.3% | 2.7% | 5.2% | 2.7% | 6.2% |
| Relaxation/ Atmosphere | 4.1% | 3.1% | 7.4% | 2.9% | 2.6% | 6.6% |
| Local culture/ Food/ Music | 5.1% | 4.3% | 2.4% | 4.0% | 2.8% | 4.3% |
| Military historical sites | 0.5% | 1.8% | 0.4% | 0.4% | 2.3% | 4.9% |
| Cleanliness | 0.3% | 0.3% | 2.3% | 0.2% | 0.2% | 0.5% |
| Event (observed/ participated) | 0.6% | 0.4% | 0.5% | 1.6% | 0.8% | 0.6% |
| Safe/ Secure | 0.1% | 0.1% | 2.1% | 0.6% | 0.1% | 0.6% |
| Public transportation | 0.2% | 0.1% | 1.5% | 0.4% | 0.1% | 0.1% |
| Japanese spoken/ understood | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% |
| Overall Positive (unspecified) | 7.6% | 7.4% | 5.5% | 6.1% | 10.4% | 5.1% |

- **U.S. West:** For this group of visitors, the activities/attractions were the most mentioned detail that made their trip to Hawai‘i excellent, followed by Hawai‘i’s natural beauty, the nice weather, and the friendly hospitality/Aloha spirit.
- **U.S. East:** Hawai‘i’s natural beauty and activities/attractions were the top two details that made the trip excellent for visitors from U.S. East. The friendly hospitality/Aloha spirit also provided a memorable experience for these visitors.
- **Japan:** A third of Japanese respondents said that the natural beauty of the islands was one thing that made their trip excellent. The beaches, friendly hospitality and nice weather were equally important to these visitors. Some visitors said they felt safe/secure and appreciated that Japanese was spoken and they were understood.
- **Canada:** For this group of respondents, the natural beauty, weather, activities/attractions and the Aloha spirit that they received were similarly important features that made their trip to Hawai‘i excellent.
- **Europe:** These visitors were most impressed by Hawai‘i’s natural beauty, followed by the activities/attractions and the friendly hospitality/Aloha spirit.
- **Oceania:** For this group of visitors, the warm hospitality/Aloha spirit that they received was the most memorable aspect of their trip to Hawai‘i. The activities/attractions and the nice weather were also features that enhanced their trip.

SUGGESTED IMPROVEMENTS

The second open-ended question asked for one detail that could have improved their trip to Hawai'i. About a quarter of the respondents across all markets provided answers that was not a complaint or gave no response to this question.

Figure 33: Give One Detail that Could Have Improved Your Trip to Hawai'i

| | Major Market Areas | | | | | |
|---|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Travel problem (with airport/airline/TSA/Customs) | 8.4% | 11.3% | 10.8% | 8.5% | 8.6% | 9.1% |
| Cost/ Expensive | 6.6% | 8.9% | 12.6% | 14.0% | 9.0% | 10.4% |
| Traffic | 10.1% | 9.5% | 2.4% | 4.3% | 3.2% | 2.3% |
| Accommodations | 8.3% | 5.5% | 6.1% | 8.4% | 7.3% | 10.4% |
| Weather | 9.0% | 7.5% | 1.1% | 6.5% | 5.8% | 2.7% |
| Food/ Restaurant | 5.3% | 5.4% | 7.7% | 7.1% | 6.2% | 7.2% |
| Ground transportation | 2.2% | 2.5% | 7.7% | 2.8% | 6.6% | 6.0% |
| Better signage/ maps/research/ planning | 2.4% | 2.9% | 3.7% | 2.6% | 2.1% | 2.5% |
| Nuisance | 2.2% | 1.9% | 5.1% | 2.6% | 2.4% | 1.5% |
| Homelessness | 2.4% | 2.5% | 3.2% | 2.1% | 2.4% | 3.3% |
| Rental car | 3.0% | 2.7% | 1.5% | 3.9% | 1.8% | 1.2% |
| Driving related | 2.6% | 2.1% | 1.2% | 2.6% | 1.7% | 1.5% |
| Unfriendly/ Unwelcome/Poor service | 1.5% | 1.0% | 2.7% | 1.3% | 1.6% | 1.5% |
| Disappointing experience | 1.1% | 1.8% | 0.9% | 1.4% | 1.5% | 2.3% |
| Longer stay/ visit Neighbor Island | 0.9% | 1.6% | 0.4% | 1.0% | 2.4% | 2.2% |
| Crime/ Safety/ Law enforcement | 0.8% | 0.7% | 1.5% | 0.8% | 0.8% | 0.6% |
| Travel companion issue | 0.7% | 0.6% | 0.1% | 0.4% | 0.5% | 0.3% |
| Illness/ Injury | 0.6% | 0.7% | 0.2% | 0.4% | 0.2% | 0.5% |
| Language barriers | 0.0% | 0.0% | 2.4% | 0.1% | 0.2% | 0.0% |
| Sea/ wildlife | 0.6% | 0.5% | 0.1% | 0.5% | 0.6% | 0.1% |
| Aggressive solicitors | 0.3% | 0.3% | 1.0% | 0.5% | 0.1% | 0.9% |
| Issues w/ other tourists | 0.3% | 0.4% | 0.8% | 0.2% | 0.5% | 0.5% |
| Smoking | 0.2% | 0.3% | 1.2% | 0.1% | 0.4% | 0.3% |
| Wi-Fi/ Internet access | 0.3% | 0.3% | 0.8% | 0.6% | 0.4% | 0.5% |
| Parking | 0.1% | 0.1% | 0.1% | 0.2% | 0.1% | 0.1% |
| Tour guide/ Travel package | 0.1% | 0.1% | 0.2% | 0.0% | 0.0% | 0.1% |
| Health concern- dengue/ zika | 0.2% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% |
| Answer not a complaint/ No response | 24.5% | 25.7% | 20.5% | 22.8% | 25.1% | 26.4% |

- **U.S. West:** For this group of respondents, 10 percent felt that better traffic would have improved their trip to Hawai'i. Others encountered bad weather (9%), had travel problems with airlines/airport/TSA/customs (8.4%) or had issues with their accommodations (8.3%).
- **U.S. East:** Among this group of respondents, travel problems (11.3%) was their main issue, followed by traffic (9.5%) and high cost (8.9%).
- **Japan:** This group of respondents felt that the high cost (12.6%) and travel problems (10.8%) were the top two things about their Hawai'i trip that could have been improved. Some visitors also mentioned that the food/restaurant and accommodations could have been better.
- **Canada:** The high cost was the main issue for Canadian visitors (14%). Some also encountered travel problems and had concerns about their accommodations.
- **Europe:** For this group, the high cost and travel problems were the top two things about their trip to Hawai'i that could have been improved. Some also had issues with the accommodations, ground transportation, and food/restaurants.
- **Oceania:** The high cost, the accommodations and travel problems were the top three things that Oceania respondents felt needed improvement.

SURVEY METHODOLOGY

The Visitor Satisfaction and Activity Survey was designed to measure visitor satisfaction with the State of Hawai'i as a vacation destination and to obtain information on visitor activities and trip planning behaviors.

Two versions of the VSAT survey instrument were used: one in English and the other in Japanese. Both survey instruments had exactly the same content. The 2015 survey has six pages and 28 questions. Copies of these two surveys instruments are presented in the appendix to this report.

The objective of the survey is to collect, process, and report satisfaction and activity data from a representative sample of domestic and international visitors. The U.S. samples were drawn from the list of completed Domestic In-Flight Survey forms. Samples of Japanese, Canadian, European, and Oceania visitors were drawn from the list of completed International Departure Survey forms and from completed Domestic In-Flight Survey forms.

These two sample lists were purged of forms with missing, incomplete, or unreadable addresses. The resulting confirmed address files became the sampling frames for U.S. and international samples. Both frames were stratified by MMA, month, visitor status (First-Time vs. Repeat), and islands visited (O'ahu vs. Neighbor Islands). Samples were selected independently each month. The sample sizes for each MMA were calculated to produce roughly equal sampling errors based on results of surveys from previous years.

Survey forms were mailed to a sample of visitors from U.S. West, U.S. East, Japanese, Canada, Europe, and Oceania after they returned home from their trip to Hawai'i. Respondents completed forms and returned them in postage-paid envelopes supplied for that purpose. English and Japanese-speaking respondents were also given the option of filling out the VSAT questionnaire online. Those who provided e-mail addresses were sent an e-mail invitation with the link to the survey. The link to the online survey was also included with the mailed survey, giving visitors the option of completing the survey online instead of mailing it back.

Figure 34: Response Rates and Sample Statistics, VSAT 2015

| MMA | Arrivals | | Mailed | | Returned | | EMailed | | Returned | | Sample Fraction | Response Rate | Sample Error |
|-----------|-----------|--------|--------|--------|----------|--------|---------|--------|----------|--------|-----------------|---------------|--------------|
| | number | Pct. | number | Pct. | number | Pct. | number | Pct. | number | Pct. | | | |
| U.S. West | 3,286,677 | 43.41% | 10,169 | 17.91% | 1,443 | 14.83% | 23,191 | 37.74% | 3,291 | 31.36% | 0.14% | 14.2% | 1.42 |
| U.S. East | 1,734,794 | 22.91% | 9,259 | 16.30% | 1,359 | 13.97% | 17,459 | 28.41% | 2,764 | 26.34% | 0.24% | 15.4% | 1.53 |
| Canada | 524,565 | 6.93% | 9,019 | 15.88% | 1,074 | 11.04% | 9,439 | 15.36% | 2,053 | 19.57% | 0.60% | 16.9% | 1.75 |
| Japan | 1,511,699 | 19.96% | 14,272 | 25.13% | 3,775 | 38.81% | 2 | 0.00% | 0 | 0.00% | 0.25% | 26.4% | 1.60 |
| Europe | 143,057 | 1.89% | 6,066 | 10.68% | 860 | 8.84% | 6,201 | 10.09% | 1,173 | 11.18% | 1.42% | 16.6% | 2.17 |
| Oceania | 371,072 | 4.90% | 8,002 | 14.09% | 1,216 | 12.50% | 5,165 | 8.40% | 1,212 | 11.55% | 0.65% | 18.4% | 1.99 |
| Total | 7,571,864 | 100% | 56,787 | 100% | 9,727 | 100% | 61,457 | 100% | 10,493 | 100% | 0.27% | 17.1% | 0.69 |

In 2015, a total of 20,200 mailed and online surveys were returned and processed. The overall survey response rate for 2015 was 17.1 percent. That produced a sample error estimate of plus-or-minus 0.69 percentage points at the 95 percent confidence level.

APPENDIX

ENGLISH LANGUAGE VSAT SURVEY FORM, 2015



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 hawaii-tourism-authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

MS. JANE DOE
ADDRESS

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.hawaii-tourism-authority.org/survey2015

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



2015 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/survey2015

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.

Instructions: Please answer each question by marking the circle [●] or writing in the space provided with a black pen or dark lead pencil.

MARKING INSTRUCTIONS table with columns for CORRECT MARKS and INCORRECT MARKS.

1. Overall, how would you rate your most recent trip to Hawai'i?

Rating scale from 8 (Excellent) to 1 (Poor) with radio buttons.

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

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

3. 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

4a. How likely are you to return to visit Hawai'i in the next five years?

- Very Likely - SKIP TO Q5a
Somewhat Likely - SKIP TO Q5a
Not too likely - CONTINUE
Not at all likely - CONTINUE

4b. 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)

- 5a. What was the primary purpose of your most recent trip to Hawai'i?
 5b. What, if any, was the secondary purpose of your most recent visit?

| | Q5a. Primary Purpose (one answer) | Q5b. 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 | <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"/> |

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]

- Myself
- My spouse
- My child(ren)/grandchild(ren) under 18
- Other adult members of my family
- My friends/associates
- My girlfriend/boyfriend
- Same sex partner

8. For each place you stayed overnight or longer, what type of accommodation did you stay in?

| | Accommodation Type | | | | | | | | | |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------|-----------------------|-----------------------|--------------------------|-----------------------|-----------------------|
| | Hotel | Condo | B&B | Time Share | Friend's or Family's Home | Home I Own | Cruise Ship | Vacation Rental Property | Other | |
| Island of O'ahu (Waikiki/Honolulu) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <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"/> | <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"/> | <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"/> | <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"/> | <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"/> | <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"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

9. 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"/> | <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"/> | <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"/> | <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"/> | <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"/> | <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"/> | <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"/> | <input type="radio"/> |
| Recreation | | | | | | | |
| Beach/sunbathing/swimming in the ocean | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Canoeing/kayaking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Snorkeling/scuba diving | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Jet skiing/parasailing/windsurfing | <input type="radio"/> | <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"/> | <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"/> | <input type="radio"/> |
| Spa | <input type="radio"/> | <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"/> | <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"/> | <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"/> | <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"/> | <input type="radio"/> |
| Entertainment and Dining | | | | | | | |
| Lunch/sunset/dinner/evening cruise | <input type="radio"/> | <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"/> | <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"/> | <input type="radio"/> |
| Fine dining | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Fast Food | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Ethnic dining | <input type="radio"/> | <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"/> | <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"/> | <input type="radio"/> |
| Designer boutiques | <input type="radio"/> | <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"/> | <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"/> | <input type="radio"/> |
| Discount/outlet stores | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Farmer's market | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Duty free stores | <input type="radio"/> | <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"/> | <input type="radio"/> |
| History, Culture, and Fine Arts | | | | | | | |
| Historic military site | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Museum/art gallery | <input type="radio"/> | <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"/> | <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"/> | <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"/> | <input type="radio"/> |
| Ukulele lessons | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Art/craft fair | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Business | | | | | | | |
| Meeting(s) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Convention / Conference | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

10. Regarding your most recent trip, how would you rate your experience for each place you visited ...

| | Excellent | Above Average | Below Average | Poor | Did not Visit |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 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"/> |

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? (Mark all that apply)

| | (A) Before | (B) During | (C) After |
|---|-----------------------|-----------------------|-----------------------|
| Travel agents | <input type="radio"/> | <input type="radio"/> | - |
| Companies specializing in packaged tours | <input type="radio"/> | <input type="radio"/> | - |
| Information from airline/commercial carriers | <input type="radio"/> | <input type="radio"/> | - |
| Information from hotels or resorts | <input type="radio"/> | <input type="radio"/> | - |
| Personal experience | <input type="radio"/> | <input type="radio"/> | - |
| Recommendations from friends or relatives | <input type="radio"/> | <input type="radio"/> | - |
| Online travel booking site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Online webpage or blog covering Hawai'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Online social networking site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Smartphone or tablet applications relevant to your trip | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hawai'i's visitor bureaus website | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Magazines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Newspapers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Books | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

13. If you used a **travel agent**, **internet**, **friends or family**, **guide books**, or **mobile apps** in planning or booking any parts of your trip, please specify how you did so below. *(Mark all that apply)*

| | Travel Agent (In person, phone or internet) | Internet (Self-planned) | Friends or Family | Guide Books | Mobile Phone or Tablet Apps |
|--|---|----------------------------|-----------------------|-----------------------|--------------------------------|
| Deciding on your vacation destination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Choosing an airline | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Choosing a place to stay | <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 or attraction packages | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Estimating the costs of your trip | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Finding restaurants | <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"/> |
| Checking the weather | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Airport check-in | <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. 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

15. Which of the following destinations have you visited for leisure in the past 3 years? *(Mark all that apply)*

- | | |
|---|---------------------------------------|
| <input type="radio"/> Australia | <input type="radio"/> Alaska |
| <input type="radio"/> Bali | <input type="radio"/> California |
| <input type="radio"/> Canada | <input type="radio"/> Florida |
| <input type="radio"/> Caribbean | <input type="radio"/> Las Vegas |
| <input type="radio"/> China | <input type="radio"/> New York City |
| <input type="radio"/> Fiji | <input type="radio"/> Other US States |
| <input type="radio"/> Guam/Saipan | |
| <input type="radio"/> Japan | <input type="radio"/> Europe |
| <input type="radio"/> Korea | <input type="radio"/> Central America |
| <input type="radio"/> Mexico | <input type="radio"/> South America |
| <input type="radio"/> New Zealand | <input type="radio"/> Other Asia |
| <input type="radio"/> Thailand | |
| <input type="radio"/> Other (specify) _____ | |
| <input type="radio"/> NONE | |

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

17. 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

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

- Yes No

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

- Yes No

20. 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

21. For each place you visited on your most recent trip, which of the following did you use?

| | O'ahu | Maui | Kaua'i | Hawai'i Island (Hilo) | Hawai'i Island (Kona) | Moloka'i | Lana'i |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Transportation | | | | | | | |
| Airport shuttle | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Public Bus | <input type="radio"/> | <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"/> | <input type="radio"/> |
| Taxi / Limousine | <input type="radio"/> | <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"/> | <input type="radio"/> |

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

22. 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

23. Which of the following categories includes your household's total annual income from all sources before taxes for 2014 (in US dollars)?

- Up to \$40,000
- \$40,000 to \$49,999
- \$50,000 to \$59,999
- \$60,000 to \$69,999
- \$70,000 to \$79,999
- \$80,000 to \$89,999
- \$90,000 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

24. What is your employment status?

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

25. We would like to know if you experienced any of the following while in Hawai'i. (Mark all that apply)

- 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 _____
- No negatives

26. 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\$

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

28. Please tell us about ONE detail that could have improved your trip to Hawai'i.

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.

JAPANESE LANGUAGE VSAT SURVEY FORM, 2015



HAWAII TOURISM
AUTHORITY

Hawaii Convention Center
1801 Kalakaua Avenue, Honolulu, Hawaii 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii tourism authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

604-8451
NAME
ADDRESS
JAPAN

アロハ!

皆様の今回のハワイ旅行が楽しい旅行となりましたことを心から願っております。

ハワイ滞在中に感じたご意見をこのハワイ観光局 来訪者アンケートにお答え頂く形でお聞かせ頂ければ幸いです。あなたのお名前は 100 万人以上の来訪者アンケートから無作為に選ばれたものです。

私たちは、ハワイに来られる皆様ひとりひとりにできるだけ楽しいご滞在を提供できるよう最善を尽くしております。つきましては、サービスの高上を計るため、率直なご意見又は感想をお聞かせくださいますようお願い申し上げます。

頂いた情報については当方で厳重に管理しアンケートとしてのみ取り扱われ、第三者に漏れることは一切ありません。全ての意見は個人単位ではなく総合意見として反映させていただきます。

私たちは QMark Research リサーチにこのアンケート業務を委託しておりますので、記入されたアンケート用紙は、封筒（郵便料支払い済み）に入れ QMark Research リサーチまでご返送下さい。このアンケートはインターネットでもご参加頂けます。パソコンとインターネット接続環境をお持ちの方は以下のウェブサイトからこのアンケートにご協力頂く事をお勧め致します。

www.hawaii tourism authority.org/survey2015

インターネットでこのアンケートにご協力頂くためのパスワードはアンケート用紙の表紙の右下に記載された 6 桁の数字です。

このアンケートに関するご質問は、QMark Research リサーチ フリーダイヤル (855) 524-7744、又は電子メールで QMSurvey@anthologygroup.com までお問い合わせ下さい。この度はハワイ諸島へお越し下さり、また貴重なお時間を有難うございました。

Sincerely,

George Szigeti
Chief Executive Officer



HAWAII TOURISM AUTHORITY

2015 年来訪者アンケート

パソコンとインターネット接続環境をお持ちの方は、下記 Web サイトでアンケートにご協力下さい

www.hawaii tourism authority.org/survey2015

パスワードはこのページ内 右下の 6 桁の数字です

アロハ! 今回のハワイ旅行について、下記の質問に率直にお答え下さい。ハワイ諸島に來られる方への対応をより良く改善するために、貴重なご意見を是非お聞かせ下さい。お答え頂いたアンケートは、皆様のハワイ滞在をより良いものとするために役立てられるもので、大変重要です。頂いた情報については、当方で厳重に管理し、第三者に漏れることは一切ありません。全ての意見は個人単位ではなく総合意見として反映させて頂きます。マハロ!

記入方法: 該当する解答欄に (●) 印をペンまたは濃い鉛筆でご記入下さい。記入された調査表は、封筒 (郵便料支払い済み) に入れ、できるだけ早急にご返送下さい。

| 印の付け方 | |
|-------------------|--------------------|
| 正しい印 ● ● ● ● ● | 間違った印 ○ ○ ○ ○ ○ |

1. 今回のハワイ旅行は全般的にいかがでしたか?

| | | | | | | | |
|--------|----------|-----------|------|---|---|---|---|
| 大変良かった | まあまあ良かった | あまり良くなかった | 悪かった | | | | |
| 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| ○ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |

2. 今回のハワイ旅行は期待に沿うものでしたか?

- 期待以上だった
- 期待通りだった
- 期待以下だった

3. お友達やご家族にハワイ旅行をすすめますか?

- すすめる
- たぶんすすめる
- あまりすすめない
- すすめない

4. 今後 5 年間にまたハワイを訪れると思いますか?

- 訪れる----- Q5a に飛ぶ
- たぶん訪れる----- Q5a に飛ぶ
- たぶん訪れない----- 次に進む
- 訪れない----- 次に進む

4b. ハワイを訪れないと思われる理由は何ですか?
(該当するもの全てに印を付けて下さい)

- 飛行時間が長すぎる
- 営利本位である/開発されすぎている
- 混雑しすぎている/交通の便が悪い/渋滞
- 価格に見合う価値がない
- もっと違うところに行きたい
- 他の財政負担がある
- サービスが悪い
- 不親切な地元住民/歓迎されていない気がした
- 健康上の理由/年齢の制限
- 5 年以内に旅行は難しい
- 物価が高すぎる
- その他 (具体的に) _____

- 5a. 今回のハワイ旅行の主な目的は何でしたか？
 5b. その他の目的があるとしたら、それは何でしたか？

| | Q5a. 主な目的 (回答は1つのみ) | Q5b. その他の目的 (複数回答可) |
|---------------------------|---------------------------|---------------------------|
| 休暇 / 観光 | <input type="radio"/> | <input type="radio"/> |
| ビジネス会合 / 仕事 | <input type="radio"/> | <input type="radio"/> |
| 集会 / 会議 / セミナー | <input type="radio"/> | <input type="radio"/> |
| 招待 / 懸賞旅行 | <input type="radio"/> | <input type="radio"/> |
| 友人 / 親戚訪問 | <input type="radio"/> | <input type="radio"/> |
| 結婚 | <input type="radio"/> | <input type="radio"/> |
| 結婚式出席 / 参列 | <input type="radio"/> | <input type="radio"/> |
| ハネムーン | <input type="radio"/> | <input type="radio"/> |
| 記念日 / 誕生日 | <input type="radio"/> | <input type="radio"/> |
| 文化・歴史行事あるいは音楽イベントに出席 / 参加 | <input type="radio"/> | <input type="radio"/> |
| スポーツ行事出席 / 参加 | <input type="radio"/> | <input type="radio"/> |
| 治療 | <input type="radio"/> | <input type="radio"/> |
| 買物 / ファッション | <input type="radio"/> | <input type="radio"/> |
| 教育 / 学校訪問 | <input type="radio"/> | <input type="radio"/> |
| 家族の集い / 同窓会 | <input type="radio"/> | <input type="radio"/> |
| 不動産購入あるいは視察 | <input type="radio"/> | <input type="radio"/> |
| その他 (具体的に) _____ | <input type="radio"/> | <input type="radio"/> |

6. 今回のハワイ旅行が休暇（観光）が目的で来られていた場合、どれに当てはまりますか？
 (回答は1つのみ)

- 生涯に1度の旅行
- 特別な機会
- 今までの旅行よりも特別
- 年に1回又は2回の定期的な旅行
- その他

7. 今回の旅行の同行者
 (該当するもの全てに印を付けて下さい)

- 一人旅
- 配偶者
- 18歳未満の子供 / 孫
- その他の家族 大人
- 友人 / 仲間
- 彼女 / 彼氏
- 同性のパートナー

8. 滞在された各島ではどのような宿泊施設をご利用になりましたか？

| | コンド | | タイム | 友人や | 自己所有 | パッケージン | | |
|------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | ホテル | ミニム | シェア | 親戚の家 | の家 | 旅客船 | レンタル | その他 |
| オアフ島 (ワイキキ/ホノルル) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| マウイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| モロカイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ラナイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ハワイ島 (ヒロ) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ハワイ島 (コナ) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| カウアイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

9. 今回訪れた各島では何をしましたか？

| | オアフ島 | マウイ島 | カウアイ島 | ハワイ島 (ヒロ) | ハワイ島 (コナ) | モロカイ島 | ラナイ島 |
|---------------------------|------|------|-------|-----------|-----------|-------|------|
| 観光 | | | | | | | |
| 個人(自分で観光した) / 島内をドライブ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ヘリコプター/ 飛行機ツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ボートツアー/ 潜水艦 / ホエールウォッチング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 地域訪問 - チャイナタウン、ハレイワなど | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| リムジン/バンツアー/ 観光バスツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 展望台/ 眺望スポット | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 映画、テレビのロケ地ツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| レクリエーション | | | | | | | |
| ビーチ/ 日光浴 / 海水浴 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| サーフィン/ ボディボード / パドルボード | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| カメラ/ カヤック | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スノーケル/ スキューバーダイビング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ジェットスキー/パラセーリング/ウィンドサーフィン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ゴルフ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ランニング/ ジョギング/ ウォーキング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スパ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| バックパッキング/ ハイキング/ キャンプ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 農業体験 - 農園、牧場など | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スポーツ行事/ トーナメント | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 州立公園 / 植物園 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| エンターテインメントとダイニング | | | | | | | |
| ランチ/サンセット/ディナー/イブニングクルーズ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 生演奏/ ステージショー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ナイトクラブ/ダンス/バー/カラオケ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 高級料理店 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファミリーレストラン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファーストフード | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| カフェ/ コーヒーハウス | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| エスニック料理 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 自分で調理する | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ショッピング | | | | | | | |
| モール / デパート | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 有名ブランドブティック | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ホテル内のショップ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スワップミート/ フリーマーケット | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ディスカウント/ アウトレットストア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スーパー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファーマーズマーケット (朝市) | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| コンビニエンスストア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 免税店 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ローカルショップと地元の職人 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 歴史、文化、美術 | | | | | | | |
| 戦争史跡 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| その他の史跡 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 美術館/ アートギャラリー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ルアウ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ポリネシアンショー/ フラショー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| レッスン/フラやカヌーなど | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ウクレレレッスン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 演劇/ コンサート/ シアター | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| アート/ クラフトフェア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| お祭り (具体的に) | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 仕事 | | | | | | | |
| 会合 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 集会 / 会議 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |

10. 今回訪れた各島ではいかがでしたか？

| | 大変良かった | 良かった | あまり良く なかった | 悪かった | 訪問しな かった |
|-----------------|--------|------|---------------|------|-------------|
| オアフ島（ワイキキ／ホノルル） | ○ | ○ | ○ | ○ | ○ |
| マウイ島 | ○ | ○ | ○ | ○ | ○ |
| モロカイ島 | ○ | ○ | ○ | ○ | ○ |
| ラナイ島 | ○ | ○ | ○ | ○ | ○ |
| ハワイ島（ヒロ） | ○ | ○ | ○ | ○ | ○ |
| ハワイ島（コナ） | ○ | ○ | ○ | ○ | ○ |
| カウアイ島 | ○ | ○ | ○ | ○ | ○ |

今回のハワイ旅行を計画された際、いつ頃その計画を決定なさいましたか？

11a. もし、旅行中に決定した場合は印を付けて下さい。

11b. もし、旅行前に決定した場合は印を付けて下さい。

もし、旅行前と旅行中に決定した場合は両方に印を付けて下さい。

11c. もし11bに印を付けられた場合、何ヶ月前に決定したか数字をご記入ください。

もし1ヶ月以内に決定した場合は‘0’をご記入ください。

| | 11a. 旅行中 | 11b. 旅行前 | 11c. 月数 | | |
|----------------------|----------|----------|---------|--|--|
| 休暇 / 観光旅行を決めた | - | ○ | | | |
| ハワイ旅行を決定 | - | ○ | | | |
| 訪問する島を決定 | ○ | ○ | | | |
| 日程を決定 | ○ | ○ | | | |
| 航空券を予約 | ○ | ○ | | | |
| 宿泊先の選択 | ○ | ○ | | | |
| 航空券を購入 | ○ | ○ | | | |
| 宿泊施設を予約 | ○ | ○ | | | |
| レンタカーを予約 | ○ | ○ | | | |
| オプションツアー/ アトラクションを購入 | ○ | ○ | | | |
| その他（具体的に） | ○ | ○ | | | |

12. (A) 旅行前 (B) 旅行中 (C) 旅行後に以下のどれを使用してハワイの情報を得ましたか？
(該当するもの全てに印を付けて下さい)

| | (A) 旅行前 | (B) 旅行中 | (C) 旅行後 |
|-----------------------------|---------|---------|---------|
| 旅行代理店 | ○ | ○ | - |
| パッケージツアー専門の会社 | ○ | ○ | - |
| 航空会社が提供する情報 | ○ | ○ | - |
| ホテル/ リゾートが提供する情報 | ○ | ○ | - |
| 個人の旅行経験 | ○ | ○ | - |
| 友人/ 親戚のアドバイス | ○ | ○ | - |
| インターネットの旅行予約サイト | ○ | ○ | ○ |
| ハワイについてのブログ、ホームページ | ○ | ○ | ○ |
| ソーシャルネットワーキングサイト | ○ | ○ | ○ |
| スマートフォン、タブレット型PCなどの旅行関連のアプリ | ○ | ○ | ○ |
| ハワイ州観光局ホームページ | ○ | ○ | ○ |
| 雑誌 | ○ | ○ | ○ |
| 新聞 | ○ | ○ | ○ |
| 本 | ○ | ○ | ○ |

13. 旅行代理店、インターネット、友達や家族、ガイドブック、モバイルアプリを旅行の計画や予約の際に利用された場合、何にそれらを利用なさいましたか？（該当するもの全てに印を付けて下さい）

| | 旅行代理店 (直接、電話 インターネット) | インターネット (自身で計画) | 友達や家族 | ガイドブック | モバイルフォン タブレット型PC |
|------------------|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 旅行の行き先の決定 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 航空会社の選択 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 宿泊先の選択 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| アクティビティの計画 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 航空券の予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ホテル、宿泊施設の予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| レンタカーの予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| オプション、アトラクションの購入 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 旅費の見積もり | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| レストランの検索 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 買物場所の検索 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 地図や行き方 / GPS | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 天気チェック | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 空港チェックイン | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| その他（具体的に）: | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. 今回のハワイ旅行以外に、過去3年間に飛行機を利用した500マイル（約800Km）以上の観光旅行（1泊以上）をなさいましたか？

はい（何回？） →

いいえ

15. 過去3年間にどこかを観光旅行なさいましたか？（該当するもの全てに印を付けて下さい）

- オーストラリア
- アラスカ
- バリ
- カリフォルニア
- カナダ
- フロリダ
- カリブ
- ラスベガス
- 中国
- ニューヨーク
- フィジー
- 他のアメリカの州
- グアム / サイパン
- 日本国内
- 韓国
- メキシコ
- ニュージーランド
- タイ
- ヨーロッパ
- 中央アメリカ
- 南アメリカ
- 他のアジア
- その他（具体的に） _____
- 該当なし

16. 前回のハワイ旅行は何年でしたか？（今回の旅行を除く）

17. その際どの島に行かれましたか？（該当するもの全てに印を付けて下さい）

- オアフ島
- マウイ島
- モロカイ島
- ラナイ島
- ハワイ島（ヒロ）
- ハワイ島（コナ）
- カウアイ島

18. ハワイに住んだことがありますか？

はい いいえ

19. ハワイ在住の友人/ 親戚がいますか？

はい いいえ

20. ハワイに不動産を所有していますか？

- はい、タイムシェアを所有しています
- はい、タイムシェア以外の不動産を所有しています
- いいえ、でも将来に考えています
- いいえ

21. 今回訪れた各島でのアクセスを利用されましたか？

| | オアフ島 | マウイ島 | カウアイ島 | ハワイ島 (ヒロ) | ハワイ島 (コナ) | モロカイ島 | ラナイ島 |
|--------------|------|------|-------|-----------|-----------|-------|------|
| 交通 | | | | | | | |
| 空港シャトル | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| トロリー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 公共バス | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 観光バス / ツアーバン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| タクシー / リムジン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| レンタカー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |

次に、もう少しあなたのことをお聞かせ下さい。

22. 最終学歴をご記入下さい

- 中学校卒 / 高校中退
- 高校卒業
- 短大、大学中退
- 職業訓練校 / 技術専門学校
- 2年生短大卒
- 4年生大学卒
- 大学院卒

23. あなたの（世帯）の2014年度総年収（税込）は次のどれに当てはまりますか？

- 350万円未満
- 350万円以上、450万円未満
- 450万円以上、550万円未満
- 550万円以上、650万円未満
- 650万円以上、750万円未満
- 750万円以上、850万円未満
- 850万円以上、1,000万円未満、
- 1,000万円以上

24. あなたの職業は？

- 自営業
- 学生
- 主婦
- その他
- 定年退職者
- 就業者

27. 今回のハワイ旅行で 素晴らしいと感じた事 を1つだけ詳しくご記入下さい。

28. 今回のハワイ旅行で改善すべきと感じた事を1つだけ詳しくご記入下さい。

25. ハワイに来られる皆様の安全と快適さは、我々にとって重要な問題です。ハワイ滞在中に以下の出来事に遭遇しましたか？（該当するもの全てに印を付けて下さい）

- 財布/バッグ/貴重品の盗難
- 客室荒らし/ 客室強盗
- 車上荒らし/ 車上強盗
- 身体的な暴力/ 被害/ ハラスメント
- 言葉によるハラスメント
- 売春婦に執拗につきまとわれた
- 麻薬を売りつけられそうになった
- ホームレスを見た
- 駐車違反/その他の交通違反
- 悪天候/ 自然災害/ 暴風
- サービス上の問題
- その他 問題点 _____
- 問題点なし

26. 今回のハワイ旅行ではあなたと同行者全員の出費も含めていくらかお使いになりましたか？買物、食事、宿泊、飛行機、その他の出費も全て含めて下さい。（米ドル表記、コンマなし）

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

ご協力ありがとうございました。

皆様から寄せられたご意見は非常に重要です。記入された調査表は、同添の封筒（郵便料支払い済み）に入れ、できるだけ早急に投函して下さいますようお願い致します。

«ExternalDataReference»