



2013

Visitor Satisfaction
& Activity Report

HAWAII TOURISM

AUTHORITY

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1. ABOUT THIS REPORT

The 2013 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 are four objectives for the survey and the report.

The first objective is 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 describes 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 measures 50 activities which are categorized as sightseeing, shopping, transportation, culture, entertainment and recreation. We also measured business activities, sports, wedding and family celebrations and visiting with friends and relatives. Those activities define the vacation trips enjoyed by our 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 show that visitors employed a variety of resources to plan, select and book a trip to Hawai'i. We have taken special notice of the impact of the Internet and travel agents on the decision-making process.

The final objective was to provide demographic profiles of Hawai'i visitors. VSAT pulls 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.

COMPARING ANNUAL DATA

VSAT 2013 surveys were mailed to visitors from U.S. West, U.S. East, Canada, Japan, Europe, and Oceania. VSAT data has been collected from U.S., Canadian and Japanese visitors since 2002. Visitors from Europe were surveyed in the years 2007, 2008, 2009, 2012, 2011 and 2013. Visitors from Oceania were surveyed in 2008, 2009, 2011, 2012 and 2013. In the last quarter of 2013, data were gathered from Chinese and Korean visitors using departure intercept interviews. We will present some preliminary data on China and Korea in a later section for this report. All other findings are based on the 2013 survey of visitors from the U.S., Canada, Japan, Europe and Oceania.

¹ Hawai'i Tourism Authority, Annual Research Report, 2013, pp. 160-162.

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. Findings related to visitors from China and Korea are reported separately.

Major Market Area (MMA): Geographic areas used to classify visitors according to their place of origin for the purpose of destination marketing management. VSAT 2013 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
7. Other Asia – China and Korea only

Visitor Lifestyle and Lifestage: 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 lifestage
- ❖ Young: Visitors between 18 and 34 years of age and who are not in the above lifestages
- ❖ Middle Age: Visitors between 35 and 54 years of age and not in the above lifestages
- ❖ Seniors: Visitors 55 years of age or over and not in the above lifestages

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

AVAILABILITY OF THIS REPORT

This report and the companion Excel workbook of 2013 VSAT data tables are available on the HTA website: <http://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, Mr. Lawrence Liu, and Ms. Jennifer Chun. The President and CEO of HTA is Mr. Michael McCartney.

2. OVERVIEW OF VISITOR INDUSTRY

2013 was another strong year for Hawai'i's visitor industry. Total expenditures by all visitors who came to the Hawaiian Islands increased 1.1 percent from 2012, to a record \$14.5 billion. Total arrivals, by air or by cruise ships, of 8,174,460 visitors (+1.8%), also reached a record high. Growth, especially accelerating growth, is generally good for the health of the visitor industry but not always good for visitor satisfaction. Growth can cause congestion at visitor attractions and bring about higher visitor-to-staff ratios across the industry, leading to lower visitor satisfaction ratings.

Arrivals by air to O'ahu increased 2.9 percent to 5,044,276 visitors in 2013. Maui reported a 2.1 percent growth to 2,358,784 air visitors. Arrivals to Hawai'i Island of 1,435,245 visitors (+0.1%) were similar to 2012. Kaua'i's arrivals rose 2.7 percent to 1,114,354 visitors. Arrivals to Lāna'i (+2.3% to 74,310 visitors) and Moloka'i (+3.4% to 55,157 visitors) also exceeded 2012.

For a complete analysis of Hawai'i's visitor industry, please refer to the 2013 Annual Visitor Research Report at: [http://www.Hawaiitourismauthority.org/default/assets/File/reports/visitor-statistics/2013 ANNUAL REPORT \(final\).pdf](http://www.Hawaiitourismauthority.org/default/assets/File/reports/visitor-statistics/2013%20ANNUAL%20REPORT%20(final).pdf).

3. VISITOR SATISFACTION

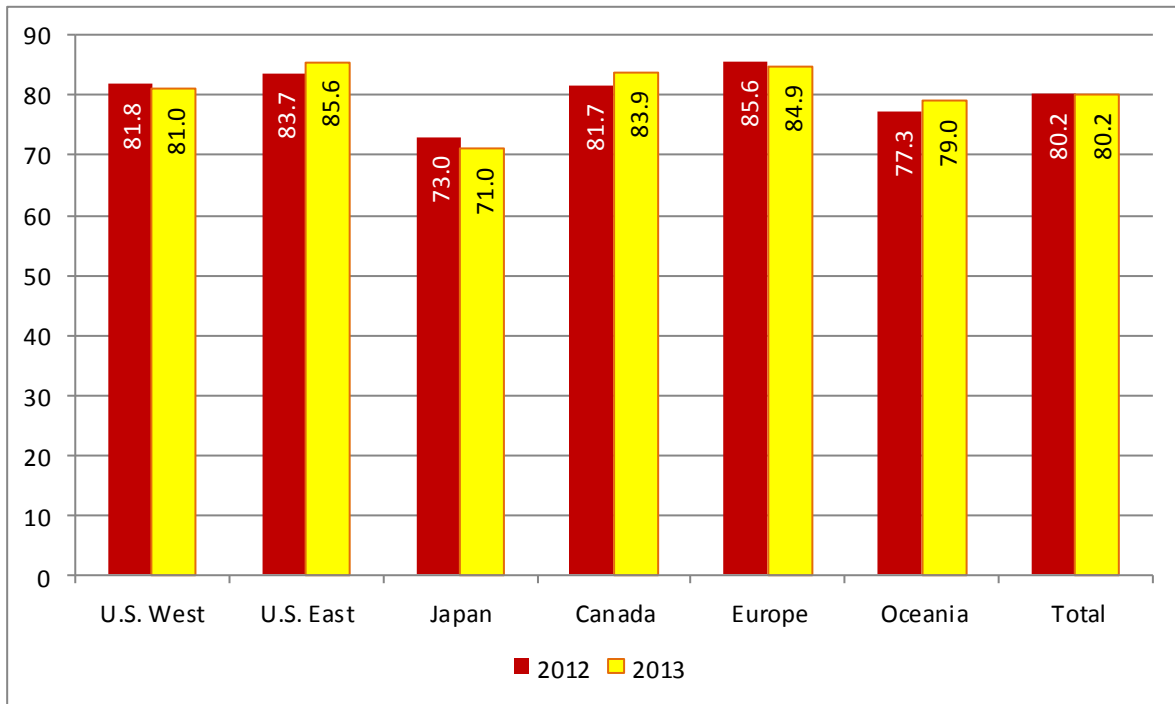
Visitor satisfaction levels are an important indicator of visitor industry performance. They provide important feedback on how well services are delivered and how well those services fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination (See the companion Excel workbook of 2013 annual VSAT data tables posted on the HTA website).

OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I

Figure 1 presents the first data taken from two consecutive VSAT surveys after switching to the new 8-point scale in 2012². The new scale measures satisfaction a bit higher than the previous 4-point scale. Figure 1 shows that satisfaction scores did not change much since last year. Visitors continued to give high marks for their overall experience in Hawai'i in 2013. More than 70 percent of visitors in from all MMAs rated their most recent trip as "excellent" (Figure 1).

Figure 1: Overall Rating of Trip

[Percentage of visitors who rated most recent trip "Excellent" by MMA³]



- "Excellent" ratings rose a bit for visitors from U.S. East, Canada, and Oceania. Overall, the ratings for the top six MMAs were similar for 2012 and 2013.

² In 2012, the response option for Overall Trip Satisfaction was changed from a 4-point scale to an 8-point scale. The intent was to increase the variance in the measure (thus enabling more effective analysis for marketing) and to do so while maintaining series continuity. The new scale does increase the variance as intended, but did not maintain series continuity.

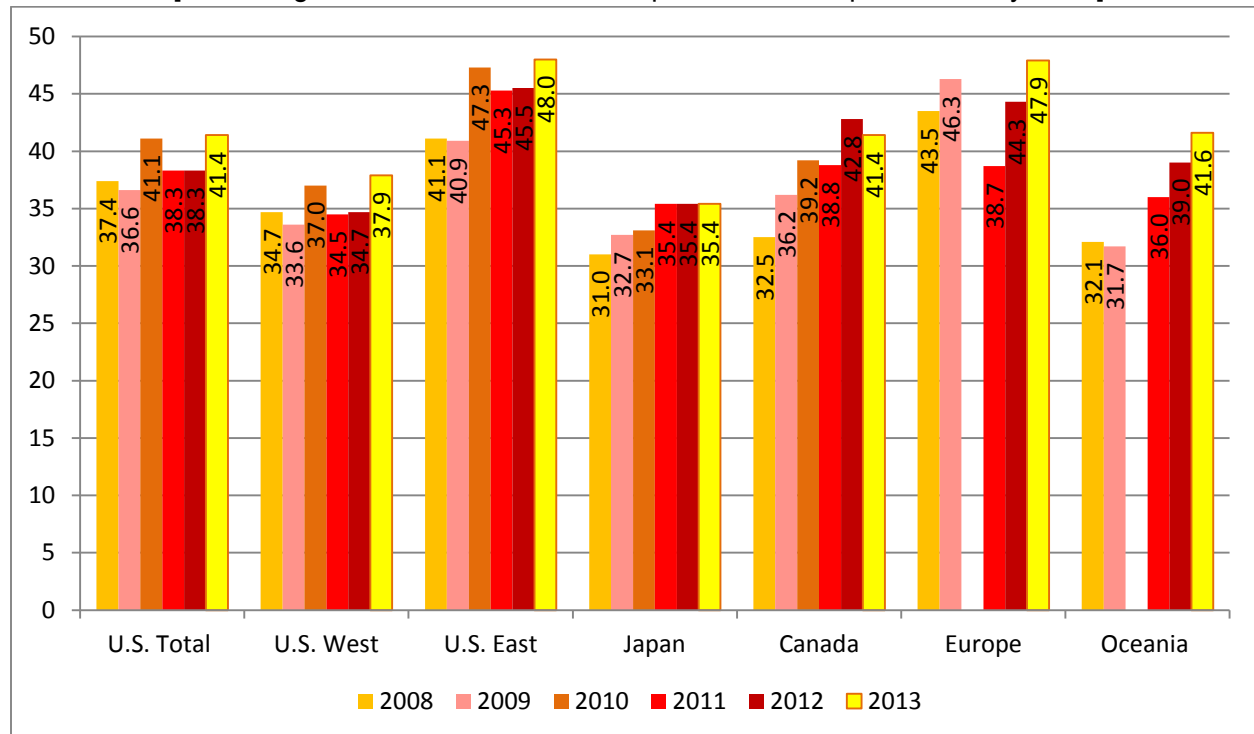
³ Percentages shown in this figure are the sum of responses 7 and 8, divided by the total responses.

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. Overall, Hawai'i's ability to *exceed expectations* remained quite strong in 2013⁴.

Figure 2: Trip Exceeded Expectations

[Percentage of visitors who said this trip "Exceeded Expectations" by MMA]



*Visitors from Europe and Oceania were not surveyed in 2010.

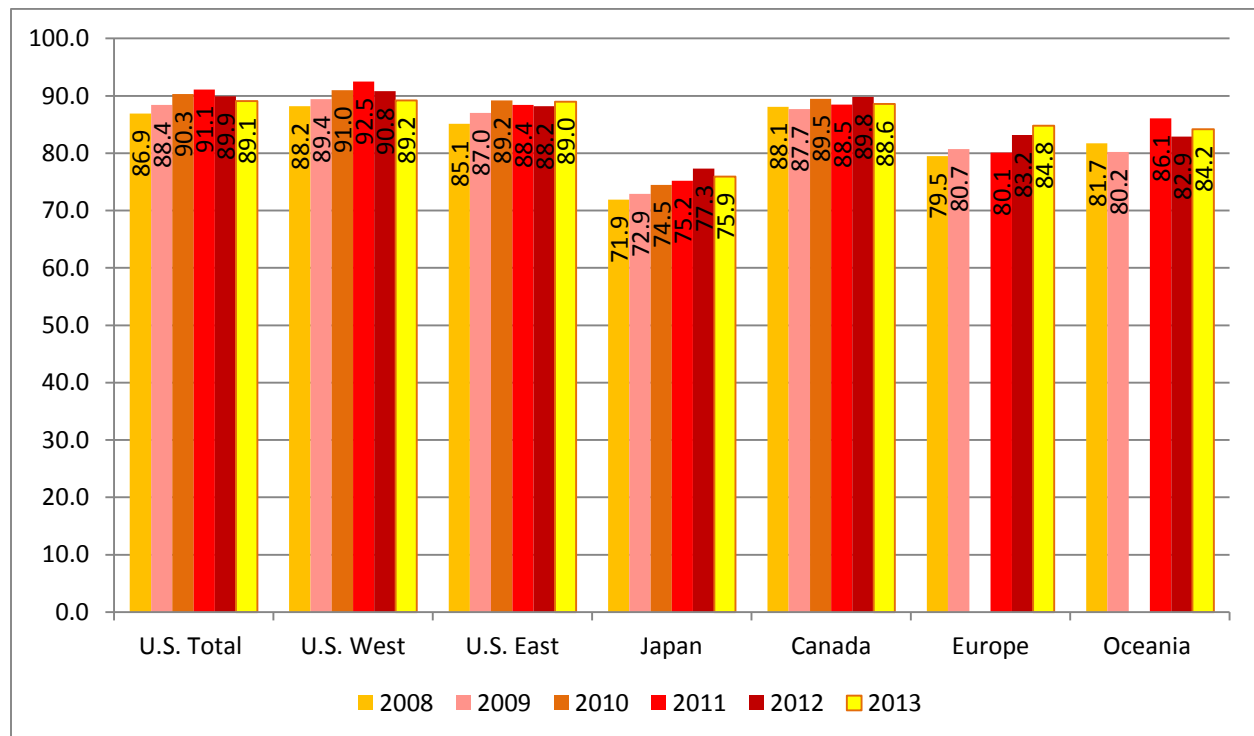
- Across all MMAs except Canada and Japan in 2013, the percentages of visitors who felt their trip exceeded their expectations were up slightly from 2012. Increases were recorded for our visitors from U.S. West (37.9%), U.S. East (48.0%), Europe (47.9%), and Oceania (41.6%).
- The trend for U.S. visitors rose from 2007 to 2010, then leveled off, and returned this year to its 2010 level. The steady rise in exceeded expectations among Japanese visitors ended at 35.4 percent in 2011 and has remained at that level through 2013. The four-year upward trend among our Canadian visitors ended this year with a 1.4 point drop to 41.4 percent. Exceeded expectations continued an upward trend for visitors from Oceania, reaching a high of 41.6 percent in 2013.
- Ratings among European visitors showed no solid trend but their rating of 47.9 percent for 2013 was the highest posted since 2008.

⁴ The alternative to exceeding expectations was primarily to have met expectations. Fewer than five percent of visitors reported that the trip failed to meet their expectations. This is a measure of excellence.

LIKELIHOOD TO RECOMMEND HAWAI'I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. The majority of visitors surveyed in 2013 continued to respond that they would very likely recommend Hawai'i to others (Figure 3). 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]



*Visitors from Europe and Oceania were not surveyed in 2010.

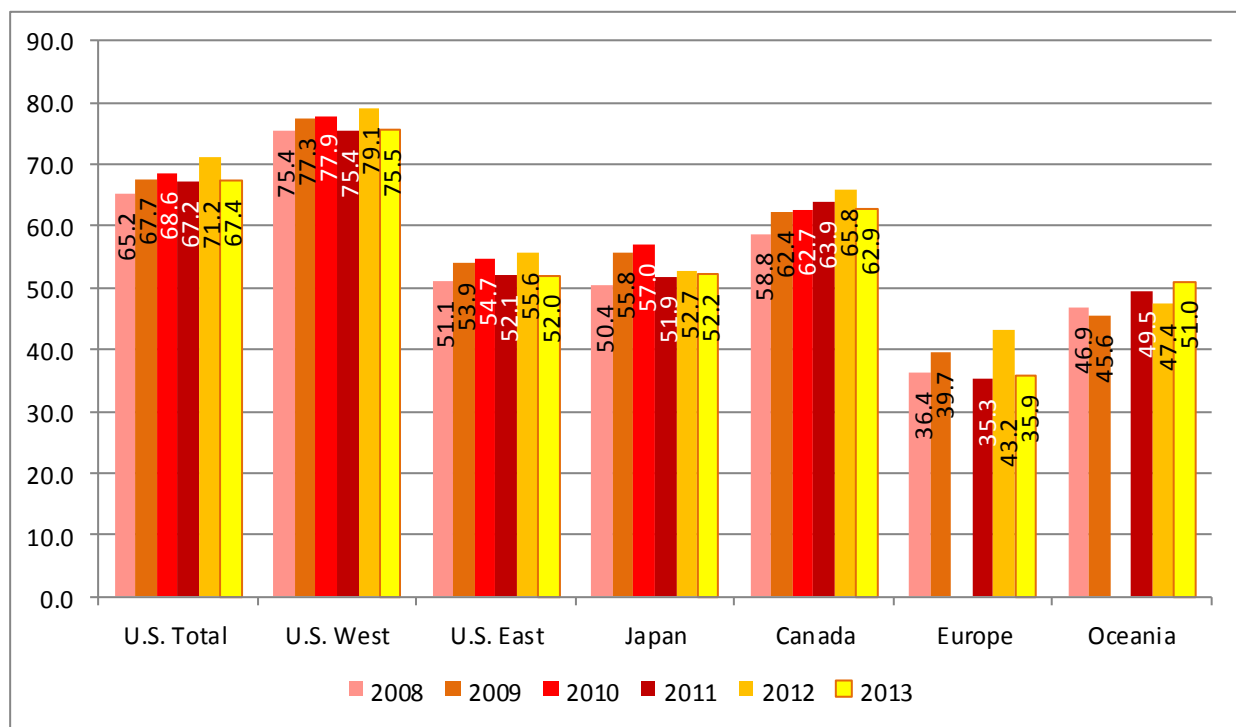
- Over the past five years, the likelihood to recommend Hawai'i to others remained relatively stable among U.S. West, U.S. East, Canadian, and European visitors. In 2013, this rating dropped about a point for our U.S. visitors. Ratings for Canadian and European visitors were up one to three points, slightly exceeding their scores for the last five years.
- The percentage of Japanese visitors who were very likely to recommend Hawai'i fell by 1.4 points marking the first decrease in this score since 2008.
- Visitors from Europe continued a rising trend, reaching almost 85 percent in 2013, while those from Oceania rose 2 points since last year.

LIKELIHOOD TO REVISIT HAWAII

Each visitor's decision to return to Hawaii is influenced by a variety of factors: positive experiences during their most recent trips, a desire for new experiences, amount of time available, financial considerations, and other commitments. Likelihood to revisit Hawaii is an indicator of future demand and changes in desires. The majority of Hawaii visitors in all MMAs except Europe continue to indicate their intention to return in the near future. The percentage likely to return was closely correlated to distance from Hawaii – the closer the MMA, the greater the likelihood of returning. That pattern has been the same since 2007.

Figure 4: Very Likely to Revisit Hawaii

[Percentage of visitors "Very Likely" to revisit in the next five years by MMA]



*Visitors from Europe and Oceania were not surveyed in 2010.

- Nearly 76 percent of U.S. West visitors in 2013 reported that they were very likely to revisit Hawaii in the next five years. This represented a 3.6 percentage point decrease since 2012.
- The percentage of U.S. East visitors who reported they were very likely to return has always been lower than the percentage of U.S. West visitors. Ratings among U.S. East visitors was 52.0 percent in 2013 after attaining a six-year high score in 2012 (55.6%).
- The percentage of Japanese visitors indicating likelihood to return to the islands within the next five years has remained relatively stable for the last three years at around 52.2 percent.
- Our Canadian visitors had been steadily rising for the last five years. This year their score fell back a bit to 62.9 percent.

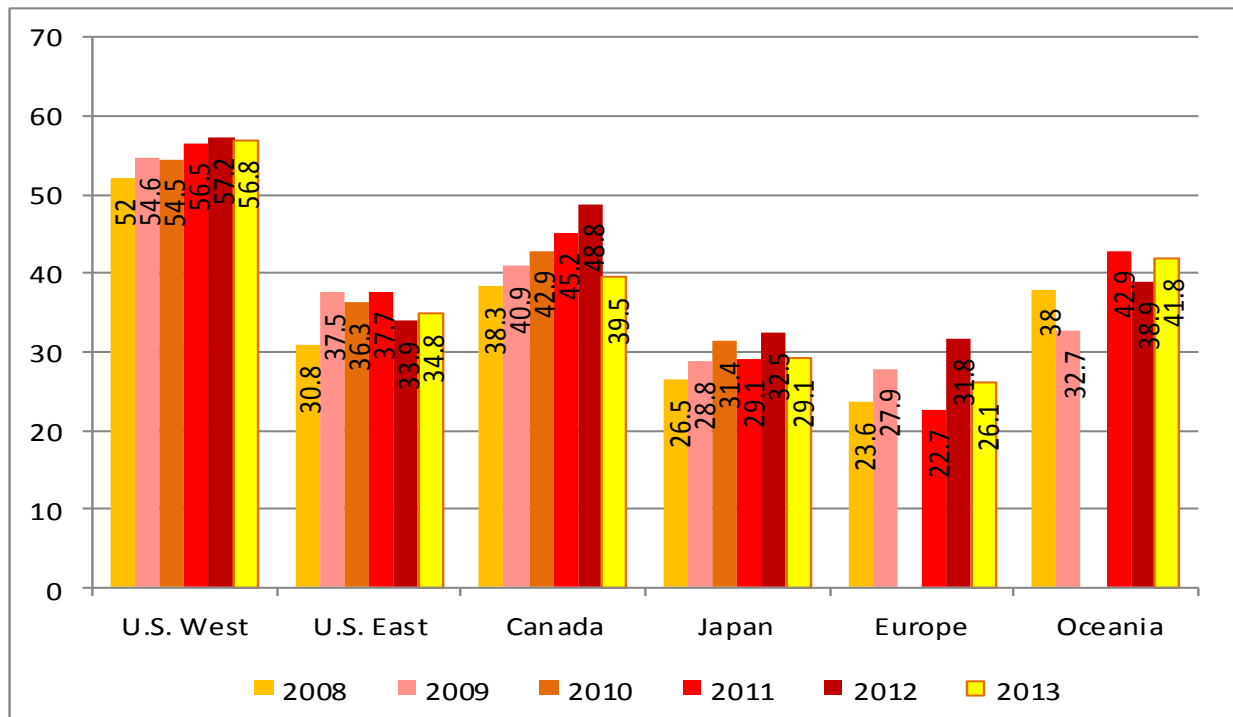
- European visitors have always been a bit less likely to take the long trip in the next five years. In 2013, after reaching a six-year high of 43.2 percent in 2012, they dropped back to 35.9 percent.
- About 51.0 percent of all visitors from Oceania reported that they were very likely to return to Hawai'i in the next five years. That was the highest rating among Oceania visitors since the year 2008. It is also fully 3.6 percentage points higher than the percentage who reported in 2012 that they would be very likely to return to Hawai'i in the next five years (47.4%).

First-Time Visitors

We expected that for first-time visitors likelihood to revisit would be correlated with repeat visitor status in the next five years. Figure 5 presents VSAT measures for likelihood of returning for the last six years.

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]



*Visitors from Europe and Oceania were not surveyed in 2010.

In 2013, about 41 percent of all first-time visitors reported they were very likely to return to Hawai'i in the next five years. The percentages ranged from a low of 26 percent for Europe, through 57 percent for U.S. West visitors. The relationship between those willing to return and distance from Hawai'i remained largely intact. The exception was that first-time visitors from Oceania had a higher than expected willingness to return than would be expected based on their distance from Hawai'i alone.

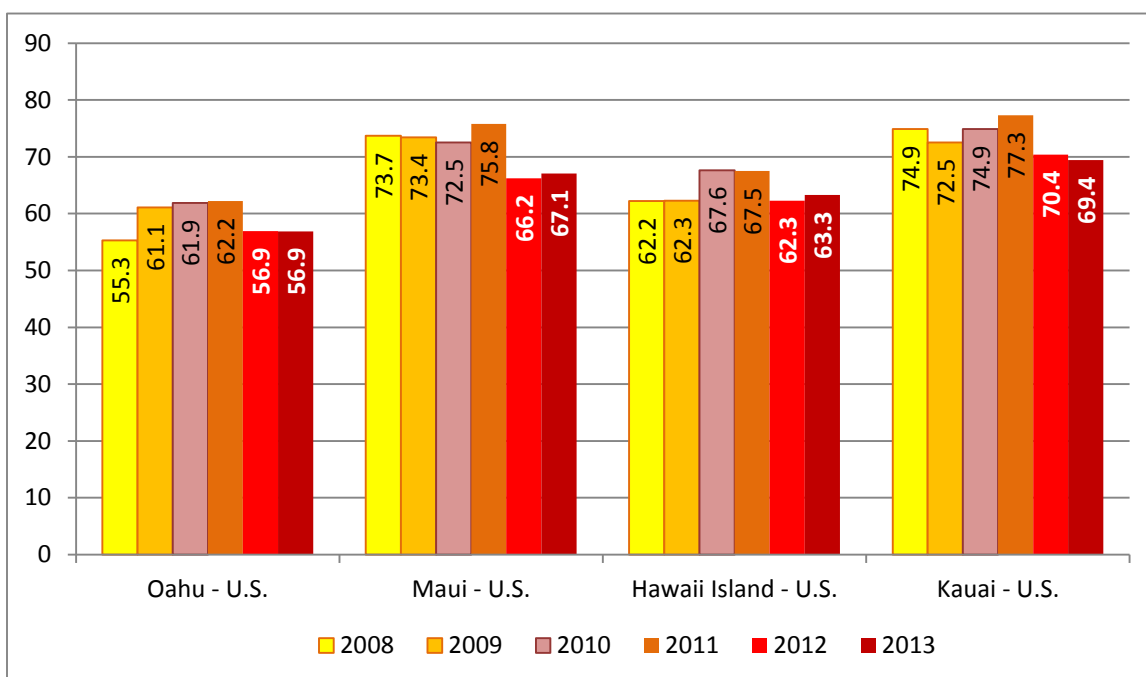
However, first-time visitors have been less likely than average to be willing to revisit Hawai'i in the next five years. First-time U.S. West visitors were only 75 percent as likely to be willing to return in the next

five years compared to the average U.S. West visitors. First-time visitor likelihood to returns was 67 percent lower among U.S. East visitors, 56 percent lower for Japanese visitors, 63 percent lower for Canadian visitors, 74 percent lower for Europeans, and 82 percent lower among visitors from Oceania.

INDIVIDUAL ISLAND EXPERIENCE

Each island has unique characteristics, activities, and products that provide different visitor experiences. Beginning in 2006, VSAT measured satisfaction separately for each of the islands visited. In general, the majority of visitors reported that their individual island experiences were “excellent”. Also, note that “excellent” ratings for individual islands were always lower than the overall satisfaction rate for their total Hawai‘i experience. Figure 6 shows island-by-island satisfaction rating among our U.S. visitors. There were no changes to questions, response options, or survey procedures that might have affected the ratings in 2013.

Figure 6: Island Experience Rated as “Excellent” – U.S. Visitors
(Percentage of visitors by island)

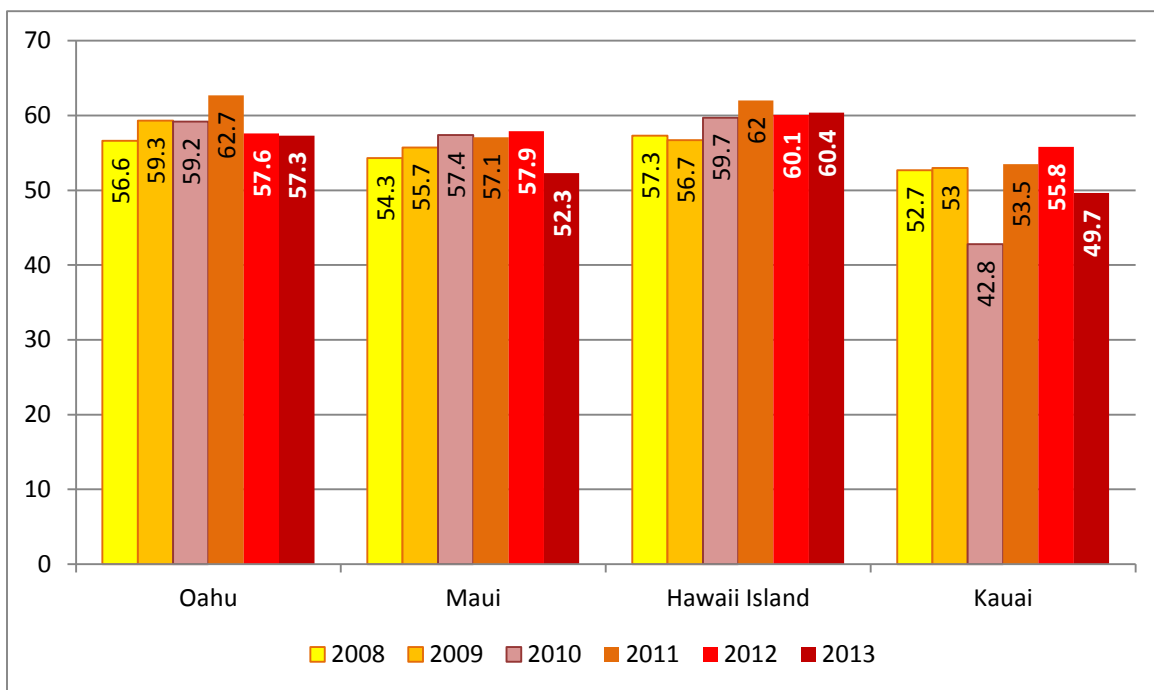


In all years since 2008, U.S. visitors gave more “excellent” ratings to Maui and Kaua‘i than to O‘ahu and Hawai‘i Island. Between 2008 and 2011, there was a slight upward trend in ratings for both of those islands. In 2012, ratings for Maui and Kaua‘i dropped several points. 2013 ratings for these islands were similar to those recorded in 2012.

Since 2008, U.S. visitors’ “excellent” ratings for O‘ahu have been slightly lower compared to other islands. O‘ahu was the lowest rated again in 2013, unchanged from 2012.

U.S. visitor ratings of “excellent” for Hawai‘i Island were steady at about 62 percent from 2008 to 2009 and then rose to nearly 68 percent in 2010 and 2011. In 2012, ratings fell again to about 62 percent and in 2013 were about 63 percent.

**Figure 7: Island Experience Rated as “Excellent” – Japanese Visitors
(Percentage of visitors by island)**

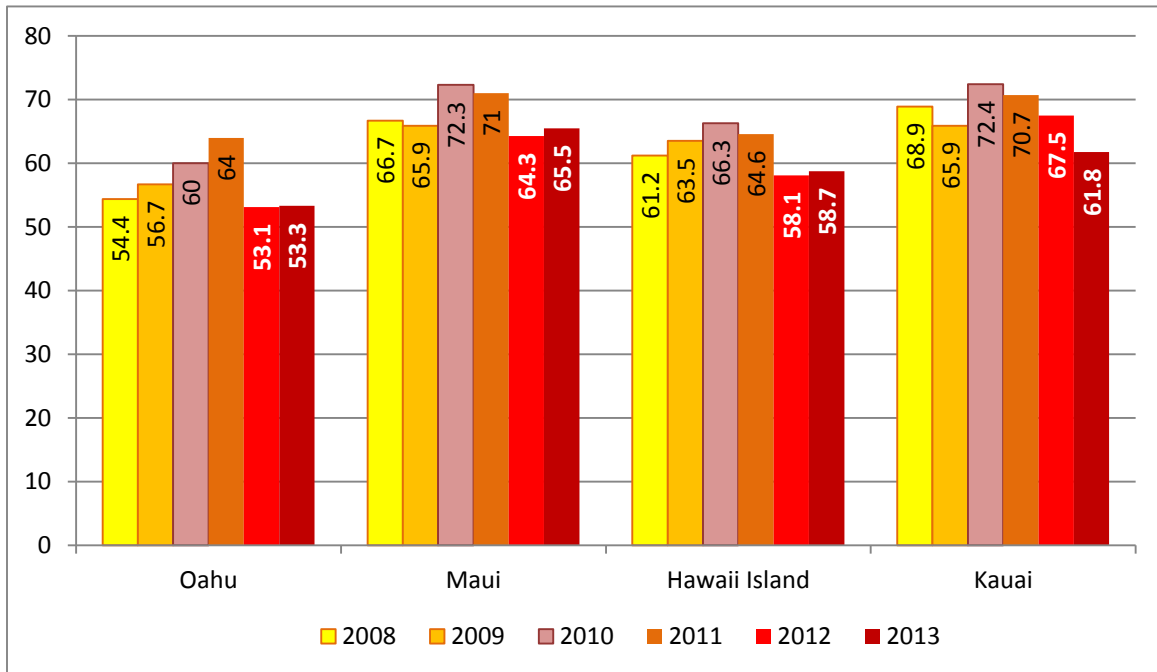


Visitors from Japan have their own scale for measuring excellence. They have given fewer “excellent” ratings for their overall Hawai‘i experiences. The same was true for individual island “excellent” ratings.

Among Japanese visitors, individual island ratings differed less than the ratings reported by U.S. visitors. Japanese 2013 ratings for O‘ahu, Maui, and Hawai‘i Island were similar at about 50 to 60 percent. The trend for O‘ahu was showing improvement between 2008 and 2011, but decreased by about five points in 2012 and remained there for 2013. Trends for Maui and Hawai‘i Islands have fluctuated by less than a point per year from 2008 through 2012. In 2013, the percentage of visitors from Japan with “excellent” ratings dropped by about six points for Maui.

Japanese “excellent” ratings for Kaua‘i have generally been lower compared to other islands by five to ten points. With the exception of a very low rating in 2010, ratings have remained around 53 percent or higher between 2008 and 2012. However, the 2013 rating was down again by about six points from 2012. However, we note that Japanese visitors were also less likely to visit Kaua‘i than the other islands.

**Figure 8: Island Experience Rated as “Excellent” – Canadian Visitors
(Percentage of visitors by island)**



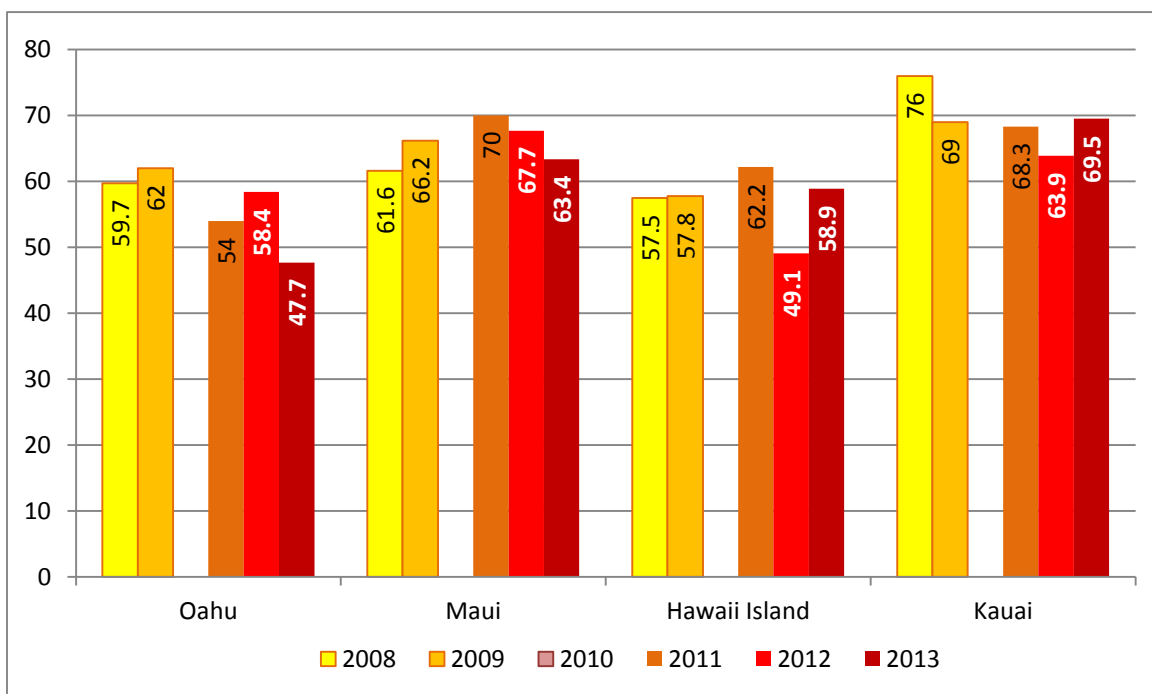
Visitors from Canada rated their overall Hawai'i experience about average for the major MMAs (Figure 1). The same pattern was observed for their individual island “excellent” ratings between 2008 and 2013.

Canadian visitors' individual island ratings were similar to U.S. visitors. Canadian visitors gave higher percentages of “excellent” ratings for Maui and Kaua'i than for the other two islands. In the case of Kaua'i, there was a decline from 2008 to 2009 before a 6.5 percent increase from 2009 to 2010. Since 2010, the percentage of “excellent” ratings for Kaua'i has been decreasing. Canadian visitor ratings for Maui, on the other hand, rose between 2008 and 2010 then fell almost six points from 2011 to 2013.

Like U.S. visitors, Canadian visitors gave the lowest “excellent” ratings to O'ahu. The trend rose from 2008 through 2011 and fell 11 points to 53 percent in 2013.

Since 2008, the percentage of Canadian visitors who rated Hawai'i Island as “excellent” was five to seven points higher than their ratings for O'ahu. In a similar pattern, Hawai'i Island's ratings rose between 2008 and 2010, then fell off about two points in 2011 and dropped again in 2012, this time by six points. In 2013, this percentage increased but by less than one point.

**Figure 9: Island Experience Rated as “Excellent” – European Visitors
(Percentage of visitors by island)**



Note: Visitors from Europe were not surveyed in 2010.

Our visitors from Europe rated their overall experience in the state just above the average for all major MMAs. However, the average rating for their individual island experience was lower than the average for the other major MMAs. Note that VSAT surveys were not administered to European visitors in 2010.

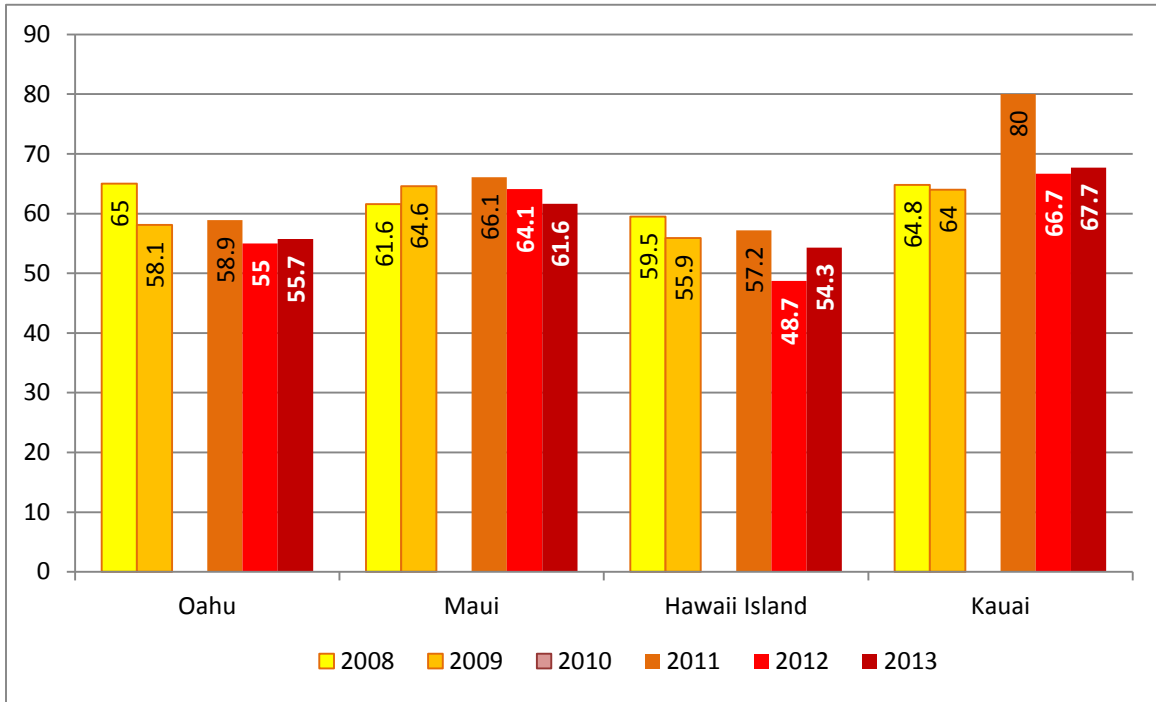
European visitors were more likely to have declared their island experiences to be “excellent” when they visited Maui or Kaua’i. Their Maui ratings averaged about 66 percent “excellent” each year. The trend has been relatively flat. Ratings dropped about four points between 2012 and 2013.

European visitors’ “excellent” ratings for Kaua’i were highest across the four islands, but have been decreasing steadily between 2008 and 2012. In 2013, Kaua’i’s rating rose by 5.6 points to almost 70 percent.

Since 2008, the percentage of European visitors who rated O’ahu as “excellent” averaged about 56 percent. No regular trend was evident in the data, but the 2013 rating (47.7%) was lower than the 2012 rating by almost 11 percentage points.

Ratings for Hawai’i Island among European visitors were relatively flat from 2008 to 2009, dropped substantially (-13 points) between 2011 and 2012 and increased by almost 10 percentage points in 2013 to 59 percent.

**Figure 10: Island Experience Rated as “Excellent” – Visitors from Oceania
(Percentage of visitors by island)**



Note: Visitors from Oceania were not surveyed in 2007 and 2010.

Visitors from Oceania rated their overall experience in Hawai'i a bit lower than other MMAs except Japan. Their “excellent” ratings for individual island experiences were also a little lower than other MMAs.

Visitors from Oceania gave their highest rating to Kaua'i in most years for which we have data. The percentage who rated Kaua'i as “excellent” was 67.7 percent in 2013, one percentage point higher than 2012.

Maui ratings by visitors from Oceania were also high, averaging about 64 percent each year they were measured. The ratings dropped 2.5 percentage points to about 62 percent in 2013. Ratings for O'ahu were somewhat lower, averaging 58 percent. These ratings were trending down during the past few years to 55 percent in 2012, before rising slightly to 55.7 percent in 2013.

Oceania visitors gave the lowest percentage of “excellent” ratings to Hawai'i Island in every year for which we have data. In 2013, that rating rose to 54.3 percent after falling to 48.7 percent in 2012.

NEW DATA: CHINA AND KOREA

HTA conducted a pilot program in 2013 to expand VSAT coverage to visitors from China and Korea. Two data collection methods were tested – the standard after-visit mail survey and an exit intercept interview conducted at the Honolulu International airport. The mail surveys had a much lower response rate than any other MMA (5.7 percent for China and 2.9 percent for Korea compared to about 30 percent of other MMAs). The intercept interview used a shorter survey instrument and produced 600 interviews per MMA per quarter at a reasonable cost. Data reported for the 4th Quarter of 2013 were from the intercept interviews only. For 2014, only the intercept method will be used for visitors from China and Korea.

In this report, we will share the first data from China and Korea. Beginning in 2014, quarterly reports will provide data for the six MMAs along with China and Korea as representative of the Other Asia MMA. The data in Table 1 show an interesting pattern. It will be useful to track these new satisfaction measures over the course of the coming year.

Satisfaction

Table 1: Measures of Satisfaction
[Percentage of Visitors from Seven MMAs, 2013]

	Japan	China	Korea	U.S.	Canada	Europe	Oceania
Overall (top 2 boxes)	71	71	85	83	84	85	79
Exceeded expectations	35	11	44	41	41	48	42
Very likely recommend	76	83	88	89	90	82	85
Very likely to return	52	38	82	67	63	36	51

Data are for 4th Quarter 2013 for all MMAs.

Overall Satisfaction: Our Korean visitors reported a level of satisfaction (85%) that was similar to visitors from the U.S., Canada, Europe and Oceania. At 71 percent, Chinese visitors were closer to the Japanese level of satisfaction.

Exceed Expectations: The new data showed that Chinese visitors' score of 11 percent was quite a bit lower than Japanese visitors' scores (35%). The Korean rating was 44 percent or about the same as visitors from MMAs other than Japan.

Likely to Recommend: Ratings by Chinese and Korean visitors of 83 percent and 88 percent, respectively, were very similar to visitors from other MMAs.

Very Likely to Return: For Chinese and Korean visitors, response patterns were atypical. Chinese visitors had a low score of 38 percent while Korean visitors had a high score of 82 percent.

Island Experience

Measures of Chinese and Korean visitors' satisfaction with their experience on individual islands are shown in Table 2. We have included only trips to the four major islands. Results exhibit interesting patterns for the two new visitor groups.

Table 2: Island Experience
[Percentage of Visitors from Seven MMAs, 2013]

	Japan	China	Korea	U.S.	Canada	Europe	Oceania
O'ahu	57	99	85	57	53	48	56
Hawai'i	22	77	77	30	29	30	18
Maui	52	53	77	67	66	63	62
Kaua'i	50	83	84	69	62	70	68

Data are for 4th Quarter 2013 for all MMAs.

Most Chinese (99%) and Korean (85%) visitors gave "excellent" ratings for their experience while on O'ahu. Their ratings for this island were 30 to 40 points higher compared to ratings received from other MMAs.

Hawai'i Island's ratings of 77 percent from both Chinese and Korean respondents were more than double the ratings by other MMA visitors. Kaua'i was rated in the mid-eighties by Chinese and Koreans, which was ten to 15 points higher than ratings from other visitor groups.

The "excellent" rating for Maui was 77 percent among Korean Visitors, more than ten points higher than ratings by visitors from other MMAs. The "excellent" rating of 53 percent from Chinese visitors, on the other hand, was only one point higher than the rating from Japanese visitors, and ten to 15 points less than rating from other visitor markets.

4. VISITOR CHARACTERISTICS

Chinese and Korean visitors have different characteristic profiles from one another and from the other visitor markets (Table 3)⁵.

Gender and Age: The percentage of male visitors from the major MMAs ranged from 45 percent for visitors from Oceania to 56 percent for visitors from Europe. The average age of visitors from the major MMAs was about 48 years. Respondents from China had an average age of 47 years and were more likely to be males (51%). Korean respondents were more likely to be female (56%) and the average age was only 38 years old.

Table 3: Selected Visitor Characteristics
[Percent of Respondents, 2013]

	Japan	China	Korea	U.S.	Canada	Europe	Oceania
Males	51	51	44	47	51	56	45
Mean age	49	47	38	51	50	44	50
College educated	62	85	84	90	77	69	55
Employed	25	63	85	71	71	74	73
Retired	17	30	5	22	23	15	22
First-time visitors	40	90	85	27	35	71	54

Data are for 4th Quarter 2013 for all MMAs.

Annual 2013 Visitor Characteristics Data for U.S., Canada, Japan, Canada, Europe and Oceania are available in the Companion Excel Workbook of VSAT tables posted on the HTA website.

Education and Employment: A higher percentage of Chinese (85%) and Korean (84%) respondents were college educated compared to visitors from Canada (77%), Europe (69%), Japan (62%) and Oceania (55%). Korean respondents were more likely to be employed than were Chinese respondents (85% vs. 63%, respectively). Fewer Chinese respondents were employed compared to visitors from Europe, Oceania, U.S. and Canada. The low percentage for Japan (25%) was typical as many of the respondents were homemakers. Only five percent of the Korean respondents were retired persons, compared to 30 percent from Chinese respondents.

First-Time: China and Korea are relatively new entrants to Hawai'i's visitor markets. As expected, survey respondents from these markets included many first-time visitors – 85 percent for Korea and 90 percent for China – much higher than for other MMAs.

⁵ For this VSAT 2013 Annual Report we have limited our visitor characteristics analysis to the six items measured for the China and Korea surveys. All of the VSAT visitor characteristics tables for all MMAs are included in the appendix tables submitted as a companion volume to this report.

PRIMARY PURPOSE OF TRIP

The reasons visitors came to Hawai'i may affect the way they determine their satisfaction ratings. Vacation continued to be the primary purpose of trip by the majority of visitors from all markets.

Table 4: Primary Purpose of Trip
[Percent reporting primary purpose, 2013]

	Japan	China	Korea	U.S.	Canada	Europe	Oceania
Vacation	66	78	52	65	83	71	88
Family	5	9	5	16	7	9	3
Wedding/ honeymoon	19	1	42	5	4	13	5
Business	2	11	2	10	3	4	1
Other	8	1	<1	4	3	4	3

Data are for 4th Quarter 2013 for all MMAs.

Family: Visit family/friends, reunion, anniversary, celebration.

Wedding: Honeymoon, get married, and attend a wedding.

Business: Business, convention, meeting, incentive trip.

More U.S. visitors came because of family (visit family/friends, reunion, anniversary, celebration) while more Japanese visitors came for weddings and honeymoons.

Among Korean visitors, 42 percent came for weddings and honeymoons, twice as high as Japanese visitors (19%).

Among Chinese visitors, only 1 percent came for weddings and honeymoons, but they had the highest percentage of visitors who came on business trips (11%).

Under 'Other' purpose of trip, the 8 percent of Japanese respondents were mostly visitors who came for the Honolulu Marathon in December.

TRAVEL BEHAVIORS

The VSAT questions on travel behaviors were asked of Chinese and Korean visitors for the first time in Fourth Quarter 2013. Table 5 compared their responses with visitors from other MMAs. More than 90 percent of all visitors reported their information usage before coming to Hawai'i.

The use of travel agents, once the mainstay of the travel industry, was still quite high among respondents from Japan (61%) and Oceania (65%), but were quite low among U.S., Canadian and European (16% to 41%) respondents. Chinese visitors (14%) were less likely than other MMAs to consult travel agents, and Korean visitors were low as well (27%).

The use of traditional media (books, magazines, and newspapers) before arriving to Hawai'i showed a similar pattern. Usage was highest in Japan (68%) and less than 51 percent in each of the other MMAs. While Korean visitors' usage were similar to those from Europe, Canada, U.S. and Oceania, Chinese visitors' use of traditional media was the lowest at 3 percent.

Table 5: Sources of Information Used Before Trip

[Percent who used selected information sources before arriving in Hawai'i, Q4, 2013]

	Japan	China	Korea	U.S.	Canada	Europe	Oceania
Travel agent	61	14	27	16	20	41	65
Corporate	45	80	19	51	57	60	55
Internet	61	29	69	55	71	76	60
Traditional	68	3	50	28	35	51	24
Personal	49	39	33	76	79	59	64
Any source	98	98	99	93	97	97	99

Data are for 4th Quarter 2013 for all MMAs.

Personal: Personal experience; advice from friends/family

Corporate: Wholesalers, airlines, hotels.

Internet: Online booking, webpage, social media, apps, HVCB site.

Traditional: Books, newspapers, magazines.

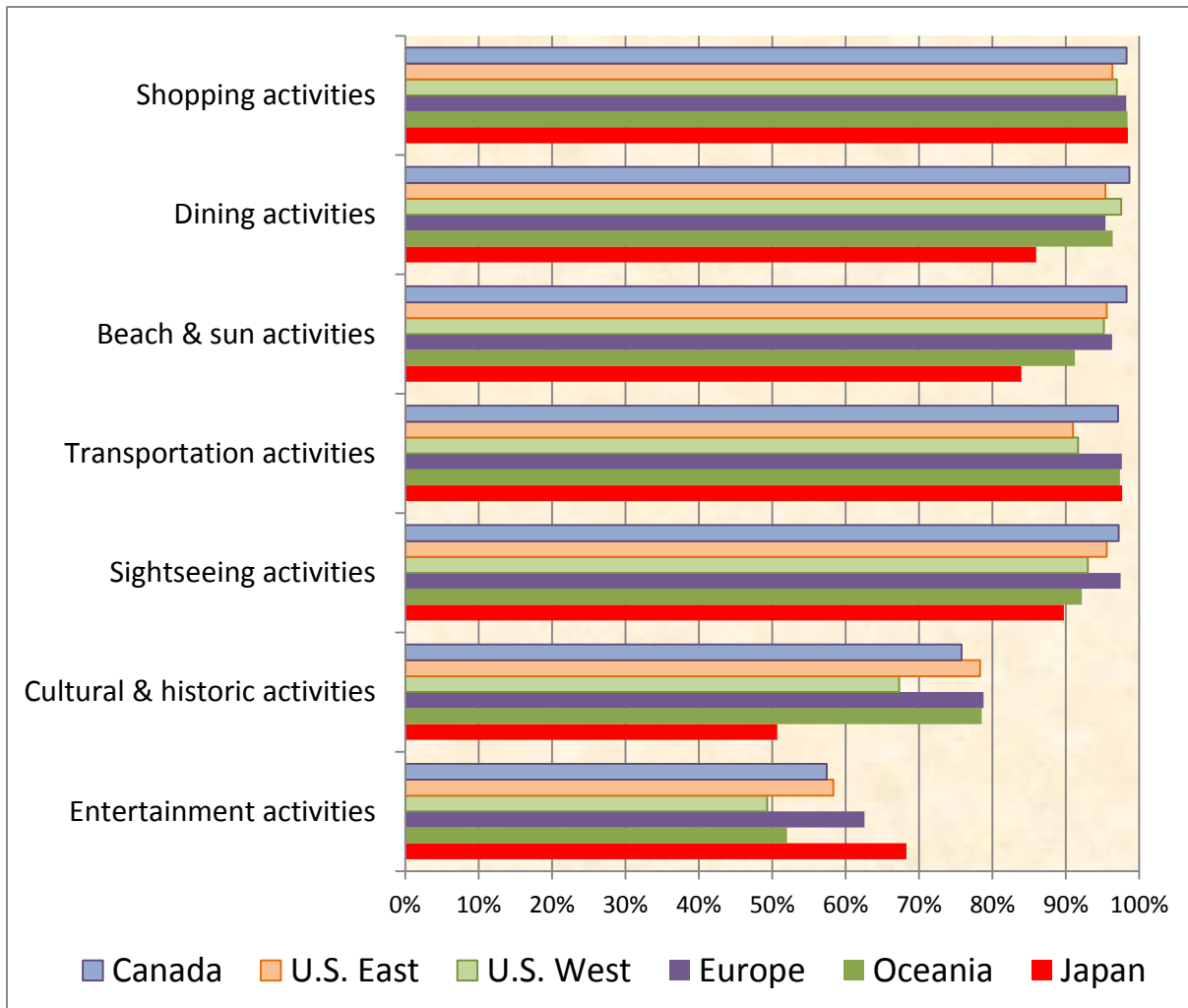
Use of the Internet as a resource for making travel decisions has been rising notably in the last decade. For our two new visitor groups, Chinese visitors showed the lowest use of the Internet (29%) while Korean visitors reported the third highest use of the Internet (69%), only 7 points below European visitors.

Chinese visitors were distinguished by very high usage (80%) of corporate sources (wholesalers, airlines, and hotels). Usage of corporate sources were the lowest among Korean visitors (19%).

5. ACTIVITY PARTICIPATION

A major objective of the VSAT survey is to monitor visitor activities⁶. Activities are the defining elements of a vacation, the chief generator of visitor experience, and the ultimate measure of consumption of our tourism product. The activities visitors choose when they travel tell us something about their motives for being here and identify activities as targets for product development. VSAT measures visitor participation for 50 different activities in seven different geographic areas of the state. (See the companion Excel workbook of 2013 VSAT data tables posted on the HTA website).

Figure 11: Visitor Activities by MMA, 2013



Sports activities and business activities were excluded from this figure.

⁶ The surveys of China and Korea visitors did not include questions related to activities.

LEISURE VISITOR ACTIVITIES BY MMA

A look at activity levels across visitor markets revealed some interesting activity profiles. All visitors shopped at similar levels and most participated in dining activities at the same high rates. Participation in other activity groups showed interesting differences.

Canada: These visitors had the highest activity levels overall, leading in all activity groups except entertainment and cultural where they were third lowest at 57 percent and 76 percent, respectively.

U.S. East: Visitors from U.S. East were very active overall. They were again among the top three MMAs for dining, entertainment, cultural and historic activities, and sightseeing. They had the lowest participation rate for transportation, but only by a few points.

U.S. West: The activity profile for U.S. West visitors was similar to U.S. East. They were slightly higher than U.S. East on shopping and dining activities. They differed, however, by their lower scores for entertainment, cultural, and historic activities.

Japan: Visitors from Japan had a unique profile. They had the lowest participation rates for dining, beach and sun, sightseeing, and cultural and historical activities. On the other hand, the Japanese participation rate was about 20 points higher than average for entertainment

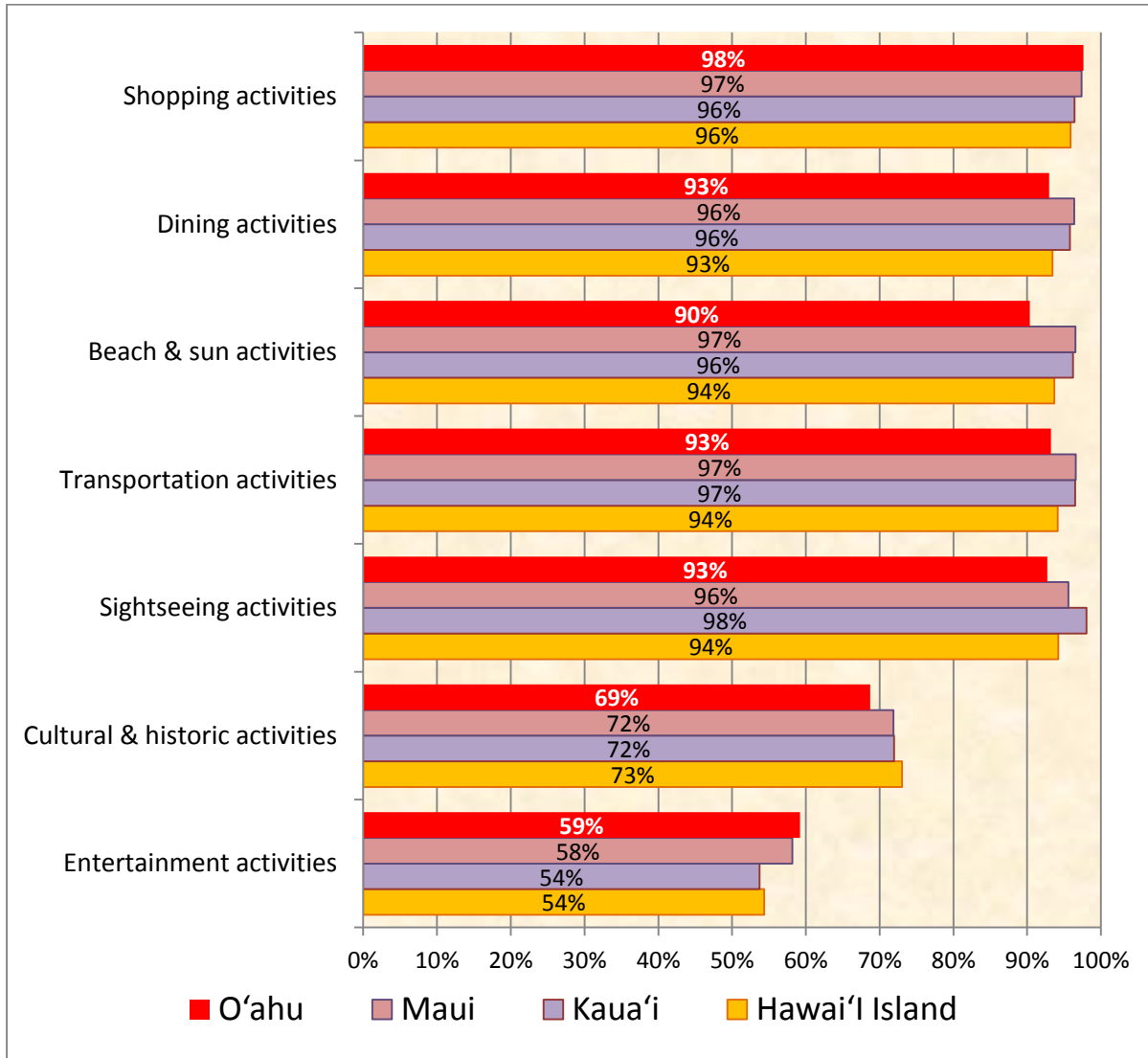
Europe: Visitors from Europe were in the top three for all but dining activities. Their participation rates in non-beach activities were relatively low but they showed heavy participation in beach and ocean activities.

Oceania: Visitors from Oceania were among the top three MMAs for shopping, dining, and transportation, but among the bottom three for entertainment, sightseeing, beach and outdoors activities. They had the second lowest percentage participating in beach and outdoors activities (91%). Their shopping percentages were high because of higher shopping rates for swap meets and discount stores.

LEISURE VISITOR ACTIVITIES BY ISLAND

Activity levels were calculated separately for each island. The data shown are the percentage of visitors to each island who participated in at least one of the activities in each group at least once during their stay on that island⁷.

Figure 12: Visitor Activities by Island, 2013



Sports activities and business activities are excluded from this figure.

⁷ Participation in activities on Moloka'i and Lāna'i were omitted here due to low sample sizes. Statistics on the 50 activities for each of the six islands are reported in the companion Excel workbook of 2013 VSAT data. Note that the data reported here for "Maui" refer to activities only on the Island of Maui.

O'ahu: Visitors to O'ahu had the highest participation rates for shopping and entertainment. O'ahu was tied with Hawai'i Island for second place (93%) for dining activities. O'ahu had the lowest participation rate for sightseeing activities (93%).

Maui: Participation in most activities were very high on this island. Maui was tied for first with Kaua'i in dining activities and had the second highest participation rates for shopping, sightseeing, entertainment, cultural and historical activities.

Kaua'i: Participation rates on Kaua'i were higher than the State average. This island had the highest rate for sightseeing (98%), tied for first for transportation activities (97%), and was second for dining (96%), beach and sun (96%), and cultural and historical activities (72%). Kaua'i's participation rate for entertainment activities was (54%).

Hawai'i Island: Participation rates on Hawai'i Island were among the lowest. This island had the highest rate for cultural and historical activities (73%), but all of the other activity groups found Hawai'i island in third or last place.

6. TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can be used to support effective marketing and promotion planning. Changes made to the VSAT survey instrument in 2012 and 2013 allowed us to capture planning activities data in greater detail in 2013⁸. Table 6 shows the timing of 11 planning activities as report by all visitors.

Table 6: Timeline of Trip Planning Elements

Trip planning elements	Began this planning activity...						
	13 months or more	10 to 12 months	7 to 9 months	4 to 6 months	1 to 3 months	less than 1 month	during the trip
Decided to take a vacation	4.5%	21.0%	10.5%	32.0%	31.3%	0.8%	-
Decided to visit Hawai'i	5.0%	20.3%	10.3%	31.4%	32.3%	0.7%	-
Decided which island(s) to visit	3.5%	18.2%	10.4%	31.8%	35.7%	0.2%	1.3%
Chose travel dates	2.5%	14.1%	10.3%	33.0%	39.9%	0.2%	1.3%
Chose a place to stay	2.5%	12.7%	9.1%	31.2%	44.1%	0.3%	1.2%
Made accommodation reservations	1.6%	10.5%	9.2%	30.8%	47.3%	0.3%	2.1%
Made airline reservations	0.8%	6.6%	9.5%	33.7%	49.2%	0.2%	1.0%
Purchased airline tickets	0.7%	5.9%	9.3%	33.0%	50.7%	0.4%	0.6%
Made rental car reservations	0.6%	4.0%	5.6%	25.3%	62.1%	1.0%	1.4%
Purchased tour or attraction tickets	0.4%	2.1%	2.9%	13.6%	63.5%	2.9%	14.6%
Made other trip decisions	0.2%	11.3%	2.6%	22.3%	60.1%	-	3.5%

On the average, trip planning began about six or seven months before the departure date. Visitors decided to take a vacation, chose their destination, and selected their islands at that time. Within the next month they chose travel dates and decided on their accommodations. In the next month they made airline and hotel reservations and paid for their tickets. They made rental car reservations and tied down some additional trip details in the following month. Finally, during the last month before they departed, some visitors bought tour or attraction tickets.

About 4.5 percent of 2013 visitors started planning their Hawai'i vacations more than a year before their arrival date. Some started planning as many as five years ahead. Very short-term planning was rare, but a few respondents (less than 1%) made their travel decisions less than a month before arrival.

Logically, decisions to take a vacation and to come to Hawai'i must be made before arrival. All other decisions can be made before or after arrival. Among 2013 visitors, 1.3 percent decided to go to another island and 1.3 percent decided to extend their stay during their trip. 1.4 percent

⁸ Some trip planning questions were changed in the 2012 VSAT making comparison with previous years difficult. Data in Table 6 are comparable with data reported in the 2012 VSAT Annual Report, but not with prior years.

made car reservations and 14.6 percent bought tour or attraction tickets during their stay in Hawai'i.

NEW INFORMATION FOR 2013

What is the extent of very early and very late planning among our visitors? Are there particular types of visitors who tend to be early and late planners? Do early and late planners differ in terms of what they do after they get here? All of these are questions previously asked of VSAT data. Until now, the data were not detailed enough to answer them.

In order to investigate trip planning patterns (Figure 13) and the characteristics of trip planners (Table 8), we needed to develop definitions for early, average, and late planners. Table 7 presents a typology⁹ for vacation planning that will support this kind of analysis. Early planners started planning early – farther from their arrival date. Late planners started planning nearer their departure date. “Average planners” had planning times that were neither early nor late, but near the average.¹⁰ These planner types were identified for each of the 11 planning activities.

Table 7: Early and Late Planners, 2013 (Percentage)

Vacation Planning Activity	Early Planners	Average Planners	Late Planners
decide to take a vacation	33.4	41.7	24.9
decide to visit Hawai'i	34.6	37.9	27.5
decide islands to visit	29.2	49.0	21.8
choose travel dates	21.9	57.2	20.9
choose a place to stay	24.4	46.3	29.3
make accommodations reservations	25.0	50.3	24.7
make airline reservations	26.8	49.1	22.9
purchase airline tickets	17.6	64.3	18.1
made car reservations	17.5	65.7	16.8
buy tour or attractions tickets	13.9	76.1	10.0

Figures are percent of visitors reporting each vacation planning activity who were early, average, and late planners.

In general, the distribution of planning types changes from one activity to the next. Early planners comprised 33 percent of those deciding to take a vacation and only 14 percent of those buying tour or attraction tickets. There was a similar pattern for late planners. On the other hand, the

⁹ The typology is based on the first quartile (late), second and third quartiles (average) and fourth quartile (early) of the distribution of planning times. Quartiles divided the range of planning times into four equal parts with respect to time. Thus, Q1 is the first 25 percent of the time range rather than the first 25 percent of visitors who respondent to the question. This was required in order to produce the analyses shown in Figure 13 and Table 8.

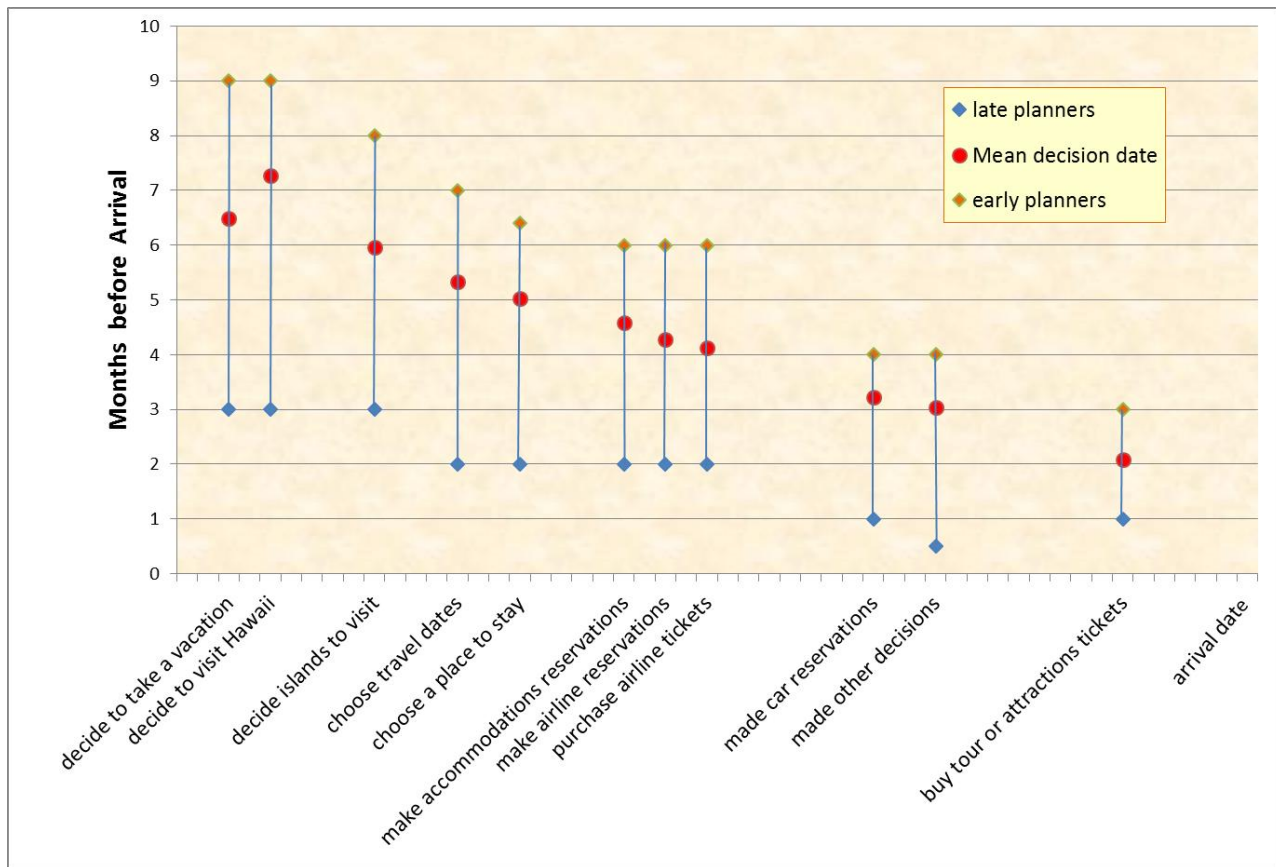
¹⁰ Data in Table 7 were not derived from Table 6. The months in which decisions were made is not directly related to whether planners were early to late. The classification system in Table 7 is based on the distribution of planning times. Figures in Table 6 are based on the distribution of respondents across time.

number of average plans, those closer to the average or mean planning time, increased from 42 to 76 percent from first to the last planning activity.

As we move down the list of travel planning activities, there is less and less deviation from the average planning time. The timing of the decision to come to Hawai'i showed wide variation. Some visitors started years ahead of time and others started only a few months ahead of their departure dates. Closer to arrival, we find that 66 percent of respondents made car reservations in the “average planner” time of about three months (Figure 13).

It was difficult to define “early planners” based on a single planning activity. As we moved from one end of the planning cycle to the next, the mean values of the planning times decreased and the distribution¹¹ around the means decreased as well.

Figure 13: Timing of Planning Decisions, 2013



Data in this Figure are shown in Table 7. This figure is not related in any way to Table 6.

Figure 13 presents a schematic chart of planning activities among Hawai'i visitors in 2013 with both axes to scale. The vertical axis showed the number of months before arriving in Hawai'i¹².

¹¹ The distributions are also not normal, but are leptokurtic and skewed hard left. This was the basis of our decision to use the first and third quartiles for our assignment of early and late planner status.

¹² The last nine activities included post-arrival dates. For instance, visitors may have decided to visit another island after they arrived at their port of entry and many visitors purchased attraction tickets after arrival (Table 7). None of

The horizontal axis showed the 11 planning activities placed in order of days prior to arrival in Hawai'i. The farthest point to the right on the horizontal axis represented the mean arrival date and the number of days before arrival increases as you move leftward on the scale.

Red circles on the graph showed the mean planning date for all visitors on each planning activity. The lower set of diamonds represented the mean number of months before arrival for late planners and the top set of diamonds marked the mean number of months before arrival for early planners. The length of the line connecting them represented the average planner time.

Figure 13 showed the continuous but uneven progress of trip planning through the 11 activities. It also illustrated that variation in planning time decreased as the process gets closer to the actual date of arrival in Hawai'i.

Setting up the classification system for early and late planners also provided the basis for investigating the characteristics of early and late planners. Our plan made use of a gross empirical strategy. We tested the relationship between planning time and a series of about 25 attributes of 2013 visitors and their vacations. Table 8 presents the average percentages of early and late planners for each of the 11 visitor characteristics and the differences between them.

Table 8: Characteristics of Early and Late Planners

Characteristic	Early Planners	Late Planners	Difference
Owens a timeshare unit in Hawai'i	40	12	-28
Played golf in Hawai'i	28	17	-11
Visitor from Oceania	27	11	-16
Visitor from Europe	25	18	- 7
Employment status is retired	24	19	- 5
No prior trips outside home state	19	31	12
First-time visitor	17	26	9
Visitor is a student	12	29	17
Traveling for business	12	28	17
Visiting friends and relatives	11	27	16
Visitor from Japan	11	29	18
18 to 24 years of age	11	33	22

Data in this table are based on the classification system described in Table 7 and shown in Figure 13. This table is not related in any way to Table 6.

The mean planning times in Figure 13 was after the arrival date. The left-hand scale expresses mean activity times in terms of "months before arrival". The calculations included cases for which the respondent reported activities that occurred after arrival. The means were never negative, that is, they were always before arrival.

The single most definitive characteristic that distinguished early and late planners was ownership of a timeshare unit. The data showed that 40 percent of timeshare owners were early planners and 12 percent were late planners. The difference of 28 points put them at the top of the list.

Several other types of visitors were more likely to be early rather than late planners. Golfers were early planners and so were older and retired visitors. Visitors from Oceania and Europe were also early planners.

The most distinguishing characteristic of late planners was youth. Young people were much more likely to plan late, as were visitors who were students. About 12 percent of business travelers were early planners and 28 percent were late planners. Business trips appeared to be put together in shorter time periods than trips for other purposes.

In 2013, Japanese visitors were more likely to be late rather than early planners, consistent with previous VSAT reports. People who were in Hawai'i primarily to visit friends and relatives took less time to plan. Finally, we saw that travel experience counts. First-time visitors to Hawai'i were more likely to be late planners, as were those who have not made any trips outside their home state in the three years prior to this trip.

7. FIRST-TIME AND REPEAT VISITORS

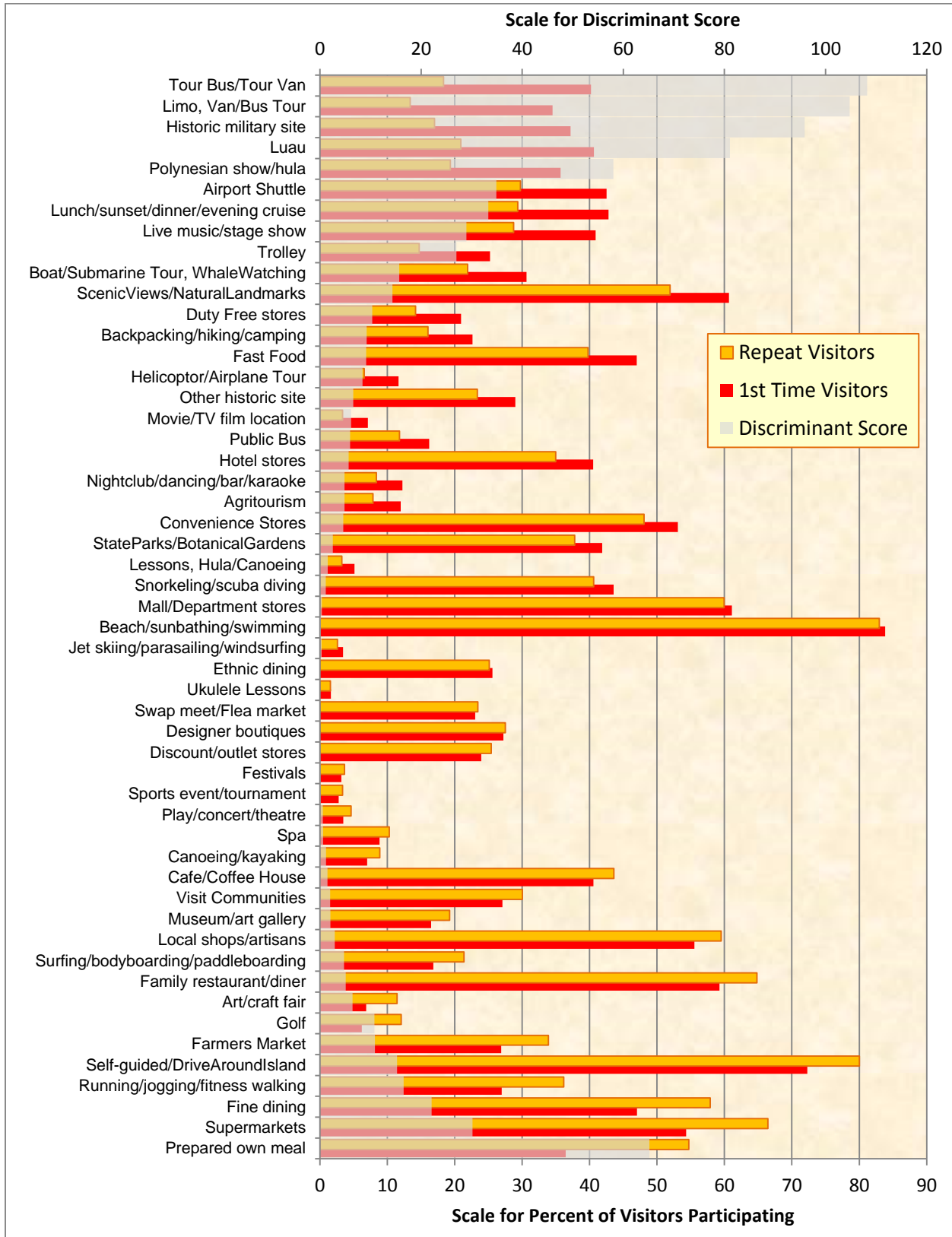
In 2012, we investigated the activity patterns for visitors who were staying with friends and relatives (SWFR) and those who visited for other purposes. We found that the two groups had different activity patterns and suggested that SWFR visitors should be excluded from or at least singled out in future activities research.

For 2013, we analyzed activity patterns for first-time and repeat visitors. Visitor industry marketing often distinguishes between these two groups for marketing, communications, and advertising planning. Common wisdom suggests they might have different motivations, different experiences, and different activities while on their trips. Their satisfaction levels have been different in the past and this year we found they have different trip planning behaviors. In addition, we had several requests for information on the activities of these two groups during the year.

ACTIVITIES FOR FIRST-TIME AND REPEAT VISITORS

Figure 14 presents visitor activities for these two groups in 2013. The initial finding was that both first-time and repeat visitors participated in all activities. On some of the more popular activities, like swimming and sunbathing, the two groups showed almost identical participation rates. The largest difference between the first-time and repeat visitors was about 26 points (50 percent of first-time and 24 percent of repeat visitors took bus or van tours in 2013). So, superficially, there was more similarity than difference between the activity patterns of first-time and repeat visitors.

Figure 14: Statewide Activity Participation, First-time and Repeat Visitors, 2013



We are looking for a set of activities that are statistically different for first-time and repeat visitors. Multiple group discriminate analysis provides a way to quickly identify activities that discriminate between first-time and repeat visitors. We used the technique to generate a set of discriminant scores¹³ for each of the 50 VSAT activities¹⁴. Those scores measure the extent to which each activity is capable of distinguishing between our two groups from high to low.

Figure 14 presents the 50 activities measured in the 2013 VSAT survey. For each one we showed the percent of first-time visitors who participated in the activity, the percent of repeat visitors who participated in that activity and the value of the discriminant score. The items were arranged first according to the extent to which first-time visitor usage exceeded repeat visitor use. Within that classification, items were sorted by discriminant scores, descending for first-time and ascending for repeat visitors.

First-time visitors: This group differed from repeat visitors in that they went on sightseeing tours dinner cruises and ventured out on their own to look at scenic views and natural landmarks. They also took air and helicopter tours, submarine rides, and visited film locations. First-time visitors saw historical military sites (Pearl Harbor and others), and Polynesian or hula shows (Polynesian Cultural Center and individual hotel shows). They went to luau and ate fast food. They took the airport shuttle and rode visitor trolleys. To a lesser extent, they shopped in hotel stores, went nightclubbing, and did some hiking. In short, those activities heavily advertised in visitor publications and designed specifically for visitor consumption, were what first-time visitors did that distinguishes them, from repeat visitors.

Repeat visitors: These visitors were more likely to prepare their own meals and shopped at supermarkets, but also splurged in a more costly evening of fine dining. They rented cars and did their own sightseeing and went surfing or body boarding, played golf, and maybe even got out into the communities. They were more likely than first-time visitors to show up at a farmer's market, a crafts fair, a museum or a local arts and crafts shop. They were also distinguished by participating much less in all those things that identify first-time visitors. We might suggest that repeat visitors were distinguished by their tendency to act less like visitors and more like local residents.

In between are some activities which both groups participated at roughly equal rates. Everybody shopped and everybody got into the ocean. Not too many tourists went to the swap meet, but among those who did, first-time and repeat visitors were evenly represented. This year the middle list splits between ethnic dining (which gave a very tiny edge to first-timers) and ukulele lessons (which were favored by repeat visitors by an equally small margin).

Results may also indicate that Hawai'i products and activities catered more to first-timers than to repeat visitors. We might think of classifying the list of activities according to the number of advertisements that appeared for each in visitor publications each month or the number of visitor industry dollars invested in development of each activity. Perhaps industry investment in items at

¹³ The standardized canonical discriminant function coefficient for the independent variables.

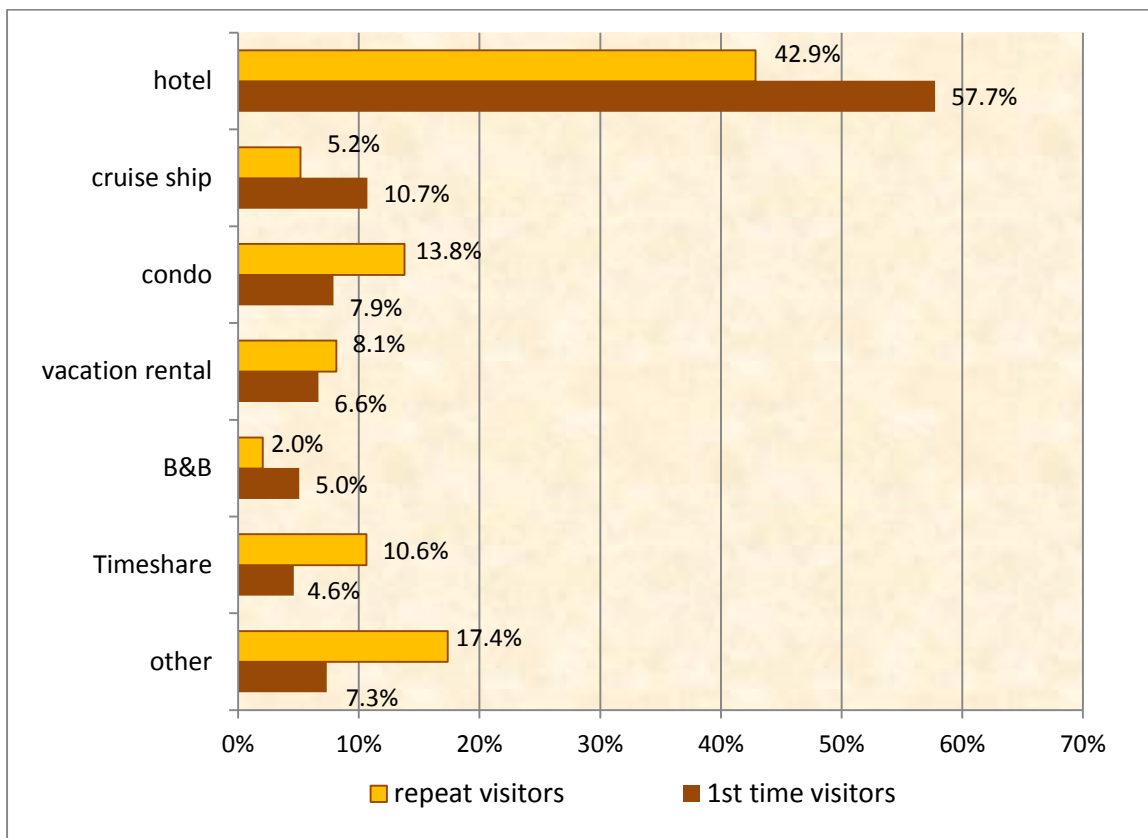
¹⁴ The activities were simplified by scoring them as 1 if the respondent had participated in that activity at least once on any island during the most recent trip to Hawai'i, and 0 if they had not.

the top of the list would be greater than investment in items nearer the bottom of the list. No evidence of this type is available in the data we have now. Nevertheless, the findings may be useful to those with an interest in visitor industry product development.

ACCOMMODATIONS FOR FIRST-TIME AND REPEAT VISITORS

The description of the two groups in terms of their characteristic activities prompted us to look into the accommodations favored by each. If activities could be classified according to the relative extent of participation by first-time and repeat visitors, perhaps the two groups use accommodations in different ways as well. In particular, we wanted to look at the possibility that first-time visitors were more likely to choose hotels than other accommodations. Figure 15 shows the results of that effort.

Figure 15: Accommodations for First-time and Repeat Visitors

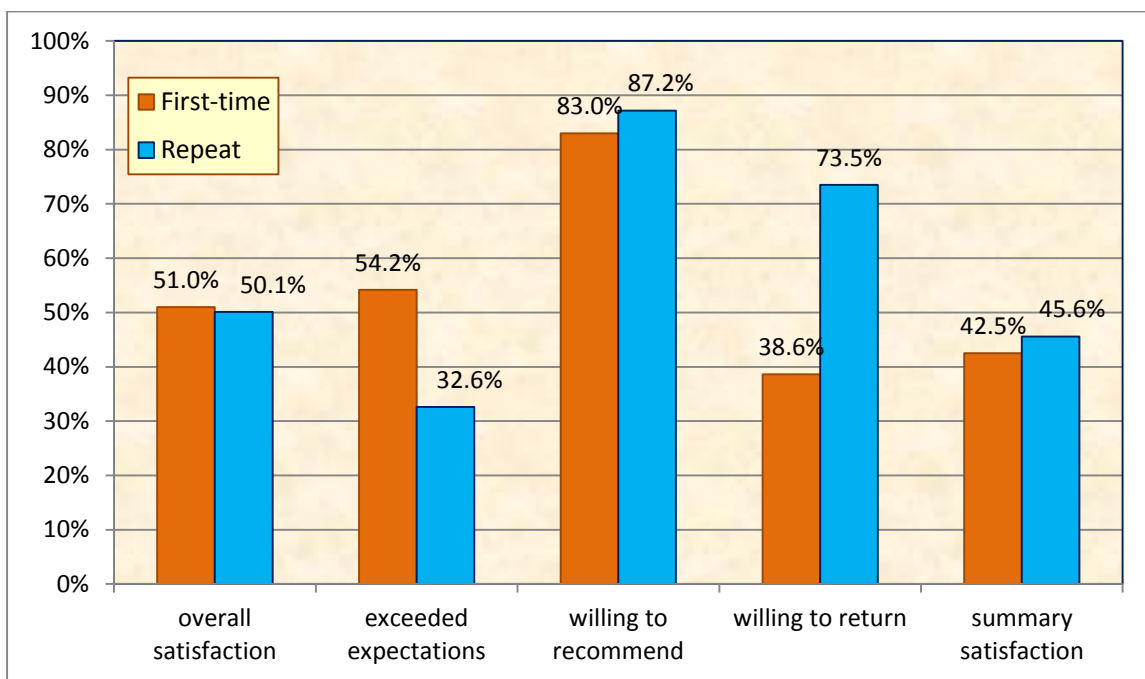


First time visitors were more likely to choose hotels than were repeat visitors. They were also more likely to stay on cruise ships or stay at a bed and breakfast. Repeat visitors were more likely to stay in condominiums or condominium hotels, timeshare units or other locations. Recall that our analysis excluded visitors who came to stay with friends and relatives.

SATISFACTION AMONG FIRST-TIME AND REPEAT VISITORS

Figure 16 presents VSAT satisfaction ratings for first-time and repeat visitors. The overall satisfaction rating is the percent of visitors who rated their most recent trip to Hawai'i as "excellent". The summary satisfaction scores rating is the percentage of visitors with combined satisfaction scores that were "very satisfied" or "extremely satisfied".

Figure 16: Satisfaction Ratings for First-Time and Repeat Visitors



Overall satisfaction with the trip is very nearly equal for both groups. A similar situation was found for willingness to recommend Hawai'i to their friends and relatives. The difference of four percentage points was statistically significant, but may not be substantively meaningful.

First-time visitors were more likely to say their 2013 trip to Hawai'i exceeded their expectations. That may reflect both the tendency for initial visitors to be impressed in Hawai'i's offering and the possibility that repeat visitors have different expectations, having been here before.

Repeat visitors were almost twice as likely as first-time visitors to say they would return to Hawai'i in the next five years. Having made the trip at least once before, we might expect that more of them would be willing to visit again in the near future.

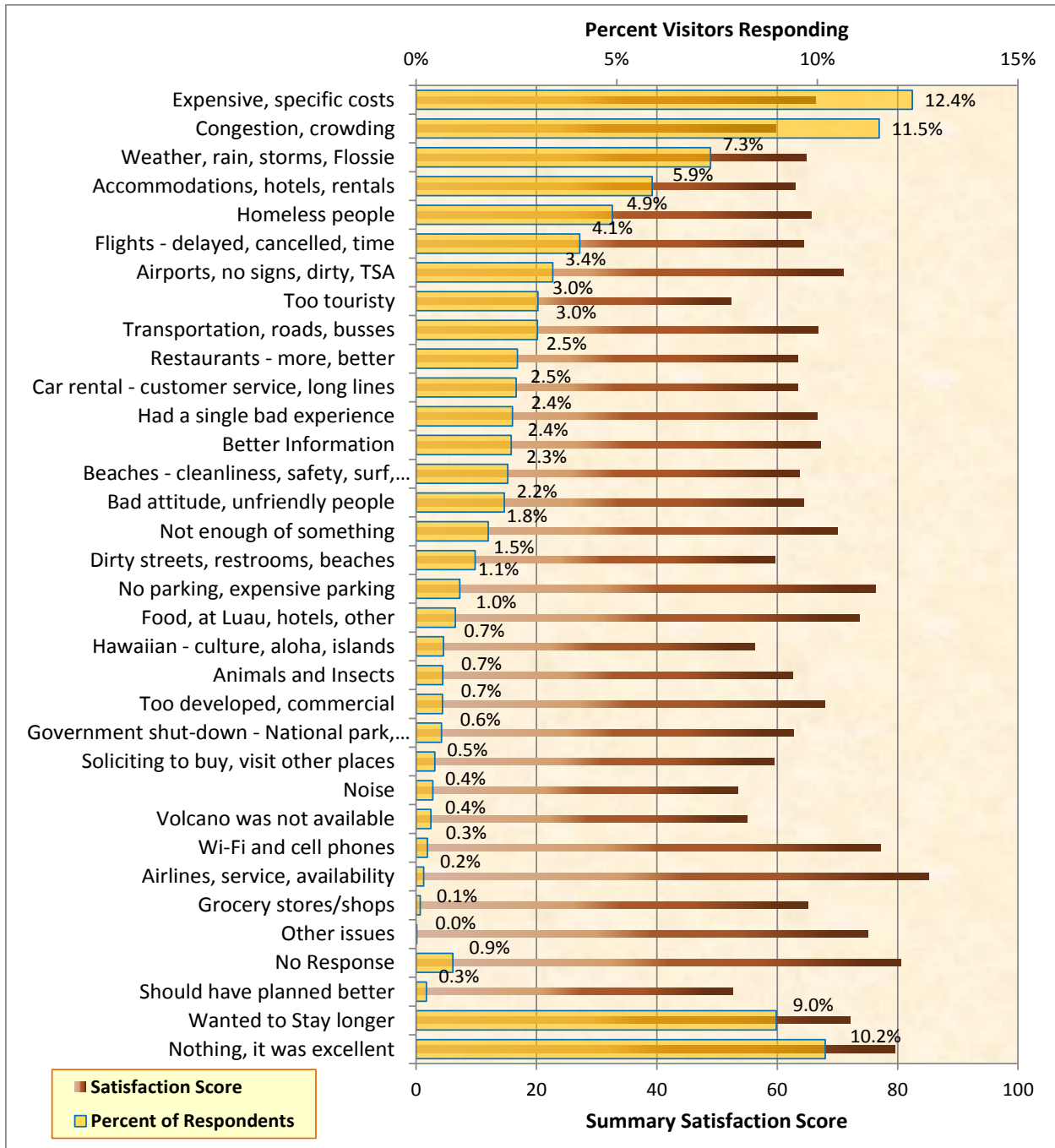
Further analysis showed that the pattern of satisfaction for these two groups was almost exactly the same for all six of our major MMAs. The single difference was a tendency for first time visitors from Europe and Oceania to be less willing to recommend Hawai'i to friends and relatives¹⁵.

¹⁵ For visitors from Europe, 79% for first-time, and 88% for repeat visitors. For visitors from Oceania, 80% for first-time, and 88% for repeat visitors.

8. NEGATIVE FEATURES OF THE HAWAI'I TRIP

At the end of the VSAT survey instrument there were two questions intended to provide respondents with the opportunity offer their own subjective opinion of their trip to Hawai'i. One question asked what the best part of their vacation was and the other asked what might have been changed to make it better. Responses to the last question are shown in Figure 17.

Figure 17: Negative Features of the Hawai'i Trip and Summary Satisfaction Scores



Respondents were allowed to offer as many comments as they wished, so percentages will not sum to 100%. Some examples were:

“Beaches: cleanliness, safety, surf problems” – general comments that beaches were not what was expected.

“Government shut-down- National parks, other” – some said it interfered with park attendance, other mentioned the shut-down in a general or generic sense.

In all, about 18.4 percent of all the VSAT survey respondents offered opinions on what might be changed to make their trip better¹⁶. About 20 percent of them offered no negatives. Instead, they used the opportunity to tell us that everything was fine, that the only thing that could have changed for the better would be to extend their stay, or that the only hitch in their trips was that they had planned incorrectly and would do better next time. The remaining 13 percent of the respondents offered the results shown in Figure 17.

The first four items on the list accounted for the majority of the comments. Cost was always an issue. Crowding was an international tourism problem, weather was an issue for any sunny destination, and accommodations were the single most important element of vacation satisfaction. All four of those items also had average summary satisfaction scores at or near the average of 61. That suggests that, while these items caused a major part of the issues reported by our visitors, they may not be associated with dissatisfaction. “Homeless people” is item number five on the list. It was cited by 4.9 percent of those who offered any comment about what could be done to make the trip to Hawai‘i better for the visitor.

REASONS FOR NOT RETURNING

One of the main satisfaction items was “How likely are you to return to visit Hawai‘i in the next five years?” Respondents who reported that they were “not very likely” or “not at all likely” to return were asked to give the reason that was so. A list of 11 reasons was offered in the survey and the respondents were asked to check all that apply. Finally, an “Other” category was offered with space for the respondent to specify what that other reason might be. The responses for the first 11 items are shown in Figure 18.

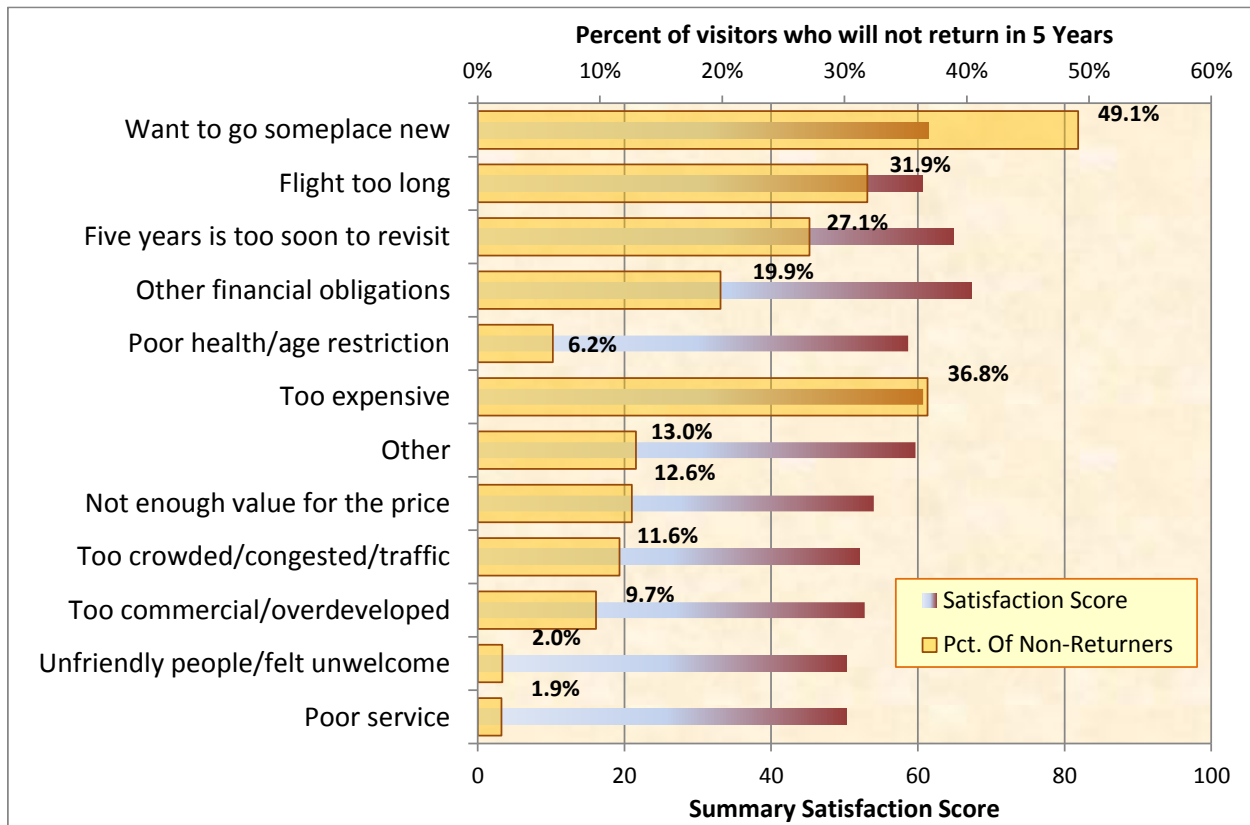
In 2013, 16.1 percent of VSAT respondents said that they did not expect to return to Hawai‘i in the next five years. Of those, nearly all (99.5%) offered at least one reason for not returning.

The first five items at the top of Figure 18 are “barriers” to returning. They are conditions of the marketplace, or characteristics of the traveler. They do not reflect any failing on the part of the destination and do not suggest a need to change or improve our visitor product. About 55 percent¹⁷ of all of those who will not return in the next five years mentioned one of those barriers.

¹⁶ Based on a total visitor population of 7,427,178 visitors in 2013 that would represent the opinions of about 652,000 visitor party heads covering a total of about 1.37 million visitors in their travel parties.

¹⁷ The unduplicated count of respondents who mentioned one or more of the barriers.

Figure 18: Reasons for Not Returning and Summary Satisfaction Scores



The seven items in the lower part of Figure 18 are “performance” issues. They are comments that indicate dissatisfaction with Hawai‘i’s visitor industry product. About 44 percent¹⁸ of those who will not return mentioned at least one performance issue. For many years, the idea that Hawai‘i is “too expensive” has been number one among performance issues. “Not enough value for the price” is similar, but is a complaint about the quality of the product rather than its price tag. Crowding and commercialization were each mentioned by about 12 percent as a reason for not returning. Problems with the way visitors are treated by visitor industry personnel made up a smaller part of the story.

¹⁸ The unduplicated count of respondents who mentioned one or more of the performance issues.

9. SURVEY METHODOLOGY

VSAT MAIL AND WEB SURVEY METHODS

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 2013 survey has six pages and 28 questions. Copies of these two surveys instruments are presented in the appendix to this report.

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. In 2013, English and Japanese-speaking respondents were also given the option of filling out the VSAT questionnaire online.

Table 9: Response Rates and Sample Statistics, VSAT 2013

MMA	Arrivals		Mailed		Returned or completed online		Sample Fraction	Response Rate	Sample Error
	number	Pct.	number	Pct.	number	Pct.			
U.S. West	3,211,429	43.1%	13,668	22.1%	3,518	20.5%	0.11%	25.7%	1.44
U.S. East	1,701,852	22.8%	12,342	20.0%	3,415	19.9%	0.20%	27.7%	1.50
Canada	517,011	6.9%	11,682	18.9%	3,075	17.9%	0.59%	26.3%	1.55
Japan	1,518,517	20.4%	11,076	17.9%	3,541	20.6%	0.23%	31.9%	1.53
Europe	136,805	1.8%	6,495	10.5%	1,730	10.1%	1.26%	26.6%	2.07
Oceania	355,568	4.7%	6,501	10.5%	1,854	10.8%	0.52%	28.5%	2.05
Total	7,441,181	100.0%	61,764	100.0%	17,133	100.0%	0.18%	27.4%	0.67

The overall survey response rate for 2013 was 27.74 percent. That produced a sample error estimate of plus-or-minus 0.67 percentage points at the 95 percent confidence level. Response rates for individual MMAs ranged from a low of 25.7 percent (+ 1.4 percentage points) for U.S. West visitors to a high of 32 percent (+ 1.5 percentage points) for our Japanese visitors.

VSAT AIRPORT INTERCEPT SURVEYS, CHINA AND KOREA MMAS

In the fall of 2013, HTA began a trial VSAT survey to cover visitors from China and Korea. The survey took the form of an airport intercept interview. The methods used are described below.

Background

Continued lower than expected response among the Korean and Chinese visitor segments to the established mail, self-administered Visitor Satisfaction Survey necessitated the need for a new approach to gathering feedback regarding their Hawai'i visit from these visitors.

In response, OmniTrak Group, Inc. suggested a new approach to gathering this feedback, using an in-person, interviewer-administered methodology. After careful consideration, the Hawaii Tourism Authority and the current VSAT vendor agreed to this new approach.

In order to provide HTA with a suitable sample for analysis purposes, a target of 400 completed surveys among each visitor segment and over the period of September 2013 – December 2013 was approved.

Methodology

A random intercept of departing Chinese (Mainland China, Hong Kong, and Macau) and Korean visitors was agreed upon. At departure lounges and holding areas of selected outbound international flights to Korea and China destinations, every “nth” visitor was approached and if qualified, invited to participate in the survey effort. Selected visitors were screened to ensure each was:

A resident of Korea or China (Mainland China, Hong Kong and Macau)

A visitor to Hawai'i for more than 24 hours but less than 30 days

Appear to be 18 years of age or older

Once deemed qualified, the visitor was engaged in a brief survey, conducted by a professional research interviewer, fluent in the Chinese or Korean language.

Selected respondents were not engaged in any other survey effort.

Staffing

- Field interviewers selected for this project were:
- Primary Mandarin or Korean speaking;
- Currently assigned to the HTA International or Island survey effort
- Required to attend a field training covering:
- Proper approach to respondent selection
- Proper administration of the survey
- Utilizing techniques for a proper field edit for logic and completeness
- Utilize techniques for refusal avoidance

Scheduling

The monthly schedule used for the International Visitor survey effort was utilized for this survey effort. Outbound flights to Korea and specific China destinations were highlighted and targeted. Data collection was taken place over the entire month to ensure a good cross-section of outbound visitors was captured.

Survey Instrument

The current survey instruments were revised as needed for the following:

Methodology – Question text revised as necessary to accommodate an interviewer-administered methodology

Length – Reduction in length from the current 6-page length to a 4-page length

Relevancy – Agreement made on specific questions to be retained or cut

The final survey was revised, reformatted, translated, and sent to all parties involved for review and approval. A standard pre-test for flow, understandability, length and appropriate translation, was conducted. The approved questionnaires were then sent to print.

Show cards required for selected questions were formatted, translated, and produced.

Production

The overall target of n=400 interviews among each visitor segment was achieved with the breakdown by month as follows:

Table 10: Response Rates for China and Korea, VSAT 2013

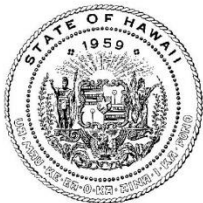
	Korean	China	Total
September	132	152	284
October	137	116	253
November	67	69	136
December	70	70	140
Totals	406	407	813

Data Cleaning/Processing/Submission

After confirming the data layout's compatibility to the VSAT vendor's layout, completed surveys were formally edited for logic and completeness, scanned and 100% verified. The data was then cleaned using developed cleaning syntax and the final data set was submitted to the VSAT vendor by the 15th of the month following data collection.

10. APPENDIX

ENGLISH LANGUAGE VSAT SURVEY FORM, 2013



Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
Website: www.hawaiitourismauthority.org

NEIL ABERCROMBIE
Governor

MIKE MCCARTNEY
President and
Chief Executive Officer

Telephone: (808) 973-2255
Fax: (808) 973-2253

«order»

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 SMS 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.hawaiitourismauthority.org/survey2013

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 SMS Research toll free at (877) 535-5767, or by e-mail to Info@SMShawaii.com. We appreciate your visit to our islands and thank you very much for your time.

Sincerely,

Mike McCartney
President and Chief Executive Officer



HAWAII TOURISM AUTHORITY

2013 VISITOR SATISFACTION SURVEY

If you have internet access and a PC, we ask that you fill out this survey on the web at:
www.hawaii tourism authority.org/survey2013
Your password is the 6 digit number on the label in the bottom right corner of this page.

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

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

MARKING INSTRUCTIONS	
CORRECT MARKS: ● ● ● ● ●	INCORRECT MARKS: ⊗ ⊘ ⊖ ⊙ ○

1. Overall, how would you rate your most recent trip to Hawaii?

Excellent		Above Average	Below Average				Poor
8	7	6	5	4	3	2	1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Would you say this trip to Hawaii ... ?

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

3. How likely are you to recommend Hawaii 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 Hawaii 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 Hawaii? (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?

	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"/>
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"/>
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"/>
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"/>
(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"/>
(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"/>
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"/>

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 2012 (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\$

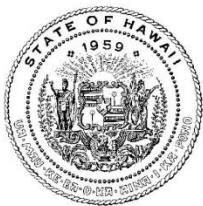
27. Please tell us about ONE detail that made your trip to Hawai'i excellent.

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, 2013



Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
Website: www.hawaii tourism authority.org

NEIL ABERCROMBIE
Governor

MIKE MCCARTNEY
President and
Chief Executive Officer

Telephone: (808) 973-2255
Fax: (808) 973-2253

«idnum»

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 万以上のリストからこの来訪者アンケートのためにランダムに選び抜かれました。

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滞在を提供できるよう最善を尽くしております。私たちのそのような気持ちが同封のアンケートになりますのでどうか率直にお答え頂きたく存じます。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に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 SMS 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 SMS 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/survey2013

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、SMS リサーチ フリーダイヤル (877) 535-5767、又は電子メールで Info@SMSHawaii.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,

Mike McCartney
President and Chief Executive Officer



2013 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/survey2013

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 親戚の家	自己所有 の家	パッケージン		
	ホテル	ミニウム	シェア			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	○	○	○	○	○	○	○
カヌー/ 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	○	○	○	○	○	○	○
バッグパッキング/ 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
 ニューゼーランド
 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2012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)

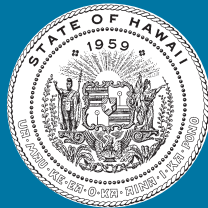
- 財布/バッグ/貴重品の盗難
- 客室荒らし/客室強盗
- 車上荒らし/車上強盗
- 身体的な暴力/被害/ハラスメント
- 言葉によるハラスメント
- 売春婦に執拗につきまとわれた
- 麻薬を売りつけられそうになった
- ホームレスを見た
- 駐車違反/その他の交通違反
- 悪天候/自然災害/暴風
- サービス上の問題
- その他 問題点 _____
- 問題点なし

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)

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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。



HAWAII TOURISM

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