



2012

Visitor Satisfaction  
& Activity Report

HAWAII TOURISM

AUTHORITY

Hawai'i Convention Center  
1801 Kālakaua Avenue  
Honolulu, Hawai'i 96815  
(808) 973-2255  
[www.hawaiiitourismauthority.org](http://www.hawaiiitourismauthority.org)

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# 1. ABOUT THIS REPORT

The *2012 Visitor Satisfaction & Activity Report* 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 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 questions – 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. A list of 50 activities was measured in categories such 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 insight into 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 and from the Domestic Inflight Survey and the International Intercept Survey<sup>1</sup>. 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 2012 surveys were administered to visitors from the U.S. West, U.S. East, Canada, Japan, Europe, and Oceania. Those same data have been collected from U.S., Canadian, and European visitors since 2002. Japanese visitors have been covered since 2008. Visitors from Oceania were surveyed in 2008 and 2009, and again this year. We will provide all possible comparisons using the data available between 2007 and 2012.

The VSAT survey was revised at the beginning of 2012. Some items were deleted and others were added. The intent was to streamline the survey instrument, decrease respondent burden, increase response rates, and to focus research on satisfaction, activities, and trip planning. The major deletions were the detailed satisfaction questions. The new survey uses the four measures of satisfaction mentioned above. Questions were added to the trip planning section, and the list of activities was changed very slightly.

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<sup>1</sup> Hawai'i Tourism Authority, Annual Research Report, 2012, pp. 160-162.

The wording of some items was changed slightly. The response options for the overall satisfaction questions were changed from a 4-point scale to an 8-point scale. The alteration resulted in a new scale with greater variance that is better suited to multivariate analysis. For some forms of analysis, the new data will not be comparable to the old data. However, for the analysis reported here – in which satisfaction is reported as “satisfied/not satisfied” – the data are comparable and results reliable. The response options for likelihood to return to Hawai‘i were changed slightly, as were those for reasons for not returning and trip planning. In both cases, the data from 2012 are not fully comparable to those collected in earlier years.

## DEFINITIONS

**Visitor:** An out-of-state traveler who stayed in Hawai‘i for a duration of at least one night and less than one year.

**Major Market Area (MMA):** Geographic areas used to classify visitors according to their place of residence. VSAT 2012 reports data for the following MMAs:

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

**Visitor Lifestyle and Lifestage:** A classification used by HTA and other visitor industry members in Hawai‘i to study specific market segments has the following classes:

- ❖ Wedding/Honeymoon: Visitors whose primary or secondary purpose of trip is to get married or be on their honeymoon
- ❖ Family Parties: 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 is available in pdf format on the HTA website. To download a copy, visit <http://www.Hawai‘itourismauthority.org/research/reports/visitor-satisfaction> and click on Visitor Satisfaction and Activity Report. For further information on the content of this report, 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, and Mr. Lawrence Liu. The President and CEO of HTA is Mr. Michael McCartney.



## 2. OVERVIEW OF VISITOR INDUSTRY

2012 was another growth year of Hawai'i's visitor industry. Total arrivals increased 10 percent from 2011, to a record 8,028,744 visitors. Visitor days were up 8.8 percent over last year and expenditures rose 18.12 percent to \$14.4 billion. 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.

The growth occurred on all Islands. O'ahu hosted 5.07 million visitors in 2012, an increase of 11.9 percent over 2011. Maui reported a 7.4 percent increase in visitor arrivals with 2.45 million visitors. Arrivals on the Island of Hawai'i climbed 10.3 percent to 1.58 million and Kaua'i's numbers grew 8.6 percent to 1.21 million visitors. The number of visitors reported for Lana'i (72,649 visitors) and Moloka'i (53,323 visitors) in 2012 were virtually unchanged from 2011.

Analysis has shown that certain characteristics of our visitor population tend to be related to relative satisfaction. Affluence, for instance, is associated with higher satisfaction scores. In 2012, about 70 percent of our visitors were employed, and one-half had household incomes greater than \$100,000. In 2011, 69 percent were employed, and 47 percent had incomes higher than \$100,000. We might expect, then that overall satisfaction scores would be higher this year. Greater affluence in 2012 was found among visitors from all of the major MMAs, with the exception of European visitors who did not change from 2011.

Visitors who travel more often and to a larger number of destinations also tend to have higher satisfaction ratings than visitors who travel less frequently. In 2012, 83 percent of visitors had traveled to a destination more than 500 miles from their home in the past three years. Among those who had traveled, 71 percent of our visitors had visited three or more destinations in the past three years and 16 percent had visited ten or more destinations during that same period. In 2011, 82 percent of visitors had made at least one trip to a destination more than 500 miles from their homes during the prior three years. The consistency in travel history would suggest that the level of recent travel experience would not account for any differences in satisfaction ratings from 2011 to 2012.

Visitors who spend more time in Hawai'i tend to rate their satisfaction higher than those with shorter stays. The average length of stay by our visitors was 9.3 days in 2012, down slightly from 9.4 days in 2011. The difference was not significant and will likely have very little impact on satisfaction ratings.

Satisfaction rates also vary for visitors who come to Hawai'i for different reasons. Those who come here on business and those who come to experience different cultures tend to have lower satisfaction scores. Those who come for a vacation only, those who come on their honeymoon, and those who come to visit friends and relatives tend to have higher scores. In 2012, the visitor mix included more visitors who arrived to vacation or honeymoon. We had more visitors this year that arrived to visit friends and relatives (+6.4%) or came to Hawai'i on business (+4.5%).

A companion volume containing a much larger set of tabulations from the VSAT 2012 has been prepared as in also available at the HTA website.

For a comprehensive analysis of Hawai'i's visitor industry, please refer to the 2012 Annual Visitor Research Report at: <http://www.hawaiiourismauthority.org/research/reports/annual-visitor-research/>.



### 3. SATISFACTION & WILLINGNESS TO RECOMMEND OR REVISIT

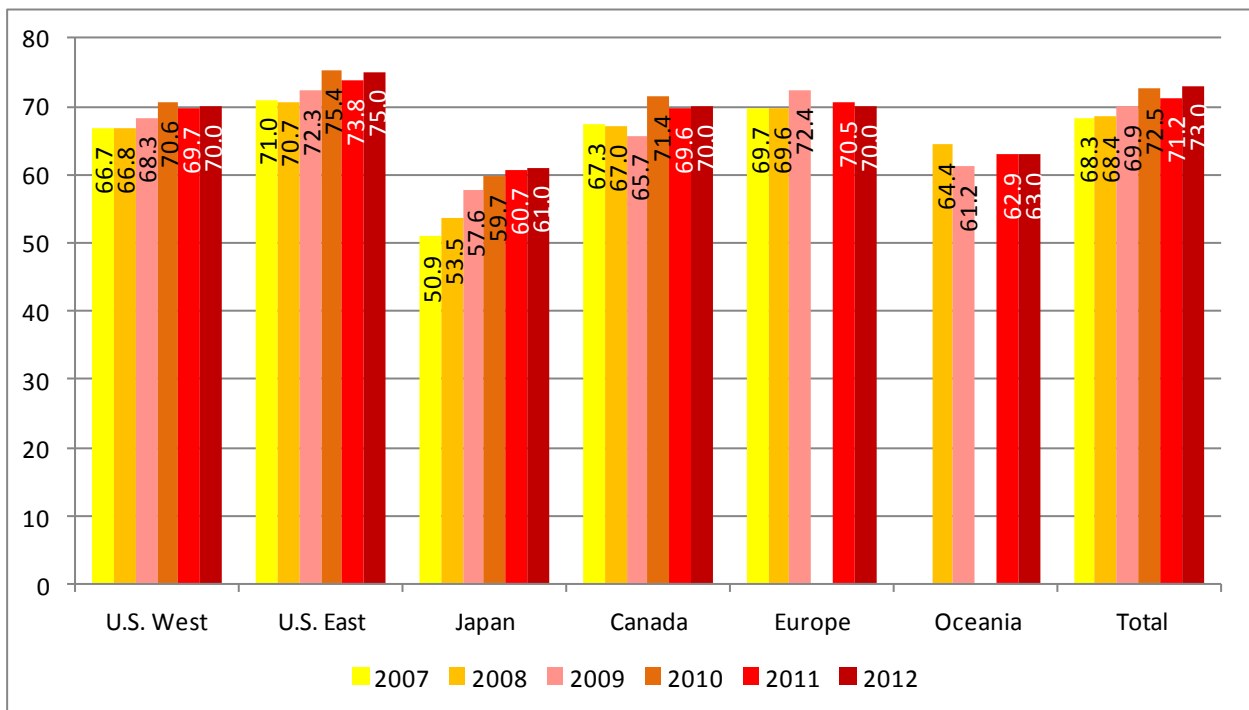
Visitor satisfaction levels are an important indicator of industry performance. These metrics provide important feedback on how well services are delivered and fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination to others.

#### OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I

Visitors continued to give high marks for their overall experience in Hawai'i in 2012. The majority of them (73%) rated their most recent trip as *excellent* (Figure 1). This represents a return to the satisfaction peak achieved in 2010 and continues the upward trend seen over the past five years.

**Figure 1: Overall Rating of Trip**

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



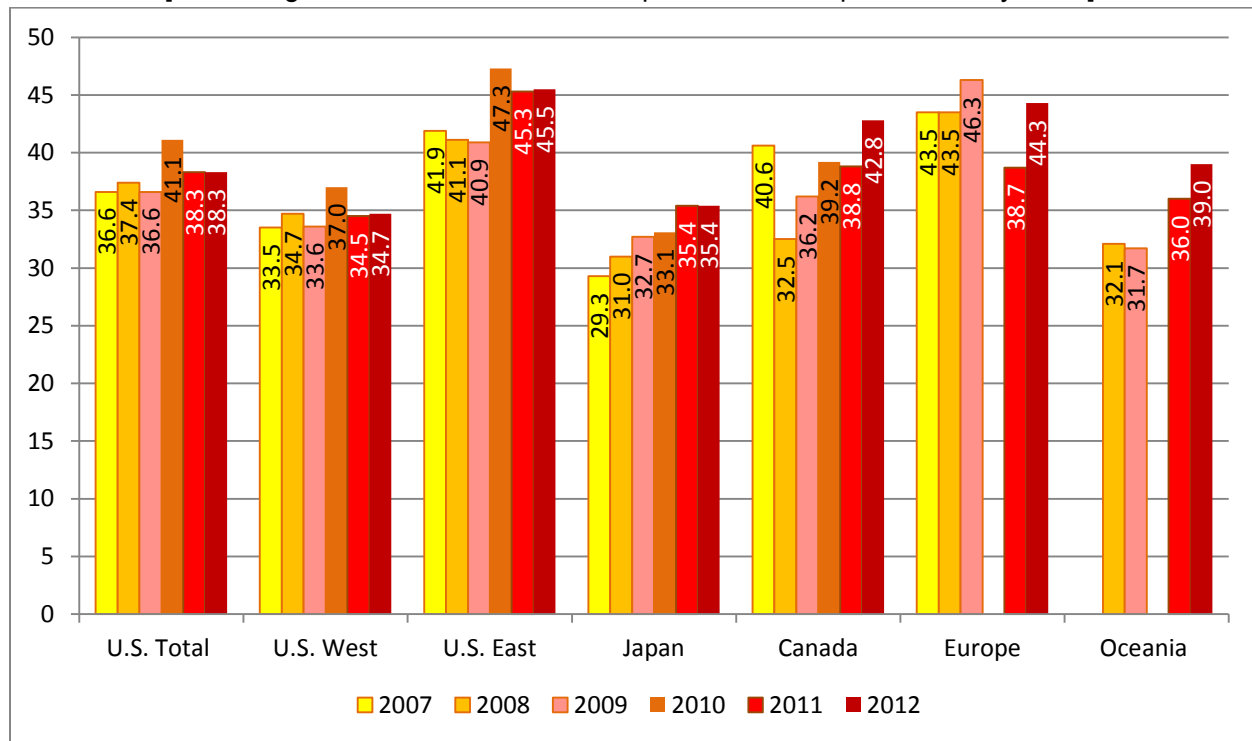
Visitors from Europe and Oceania were not surveyed in 2010. See Tables 3.1 to 3.2 in the companion volume.

- In 2012, 75 percent of U.S. East and 70 percent of U.S. West visitors rated their most recent trip to the islands as *excellent*, about the same as their 2011 ratings.
- Sixty-one percent of Japanese visitors surveyed in 2012 rated their Hawai'i experience as *excellent*, the highest percentage in the last six years. With the current ratings, the upward trend over the past five years appears to be leveling off.
- Satisfaction ratings from Canada (70%), Europe (70%), and Oceania (63%) visitors remained essentially unchanged from 2011.

## 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 2012<sup>2</sup>.

**Figure 2: Trip Exceeds Expectations**  
[Percentage of visitors who said this trip "Exceeded Expectations" by MMA]



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

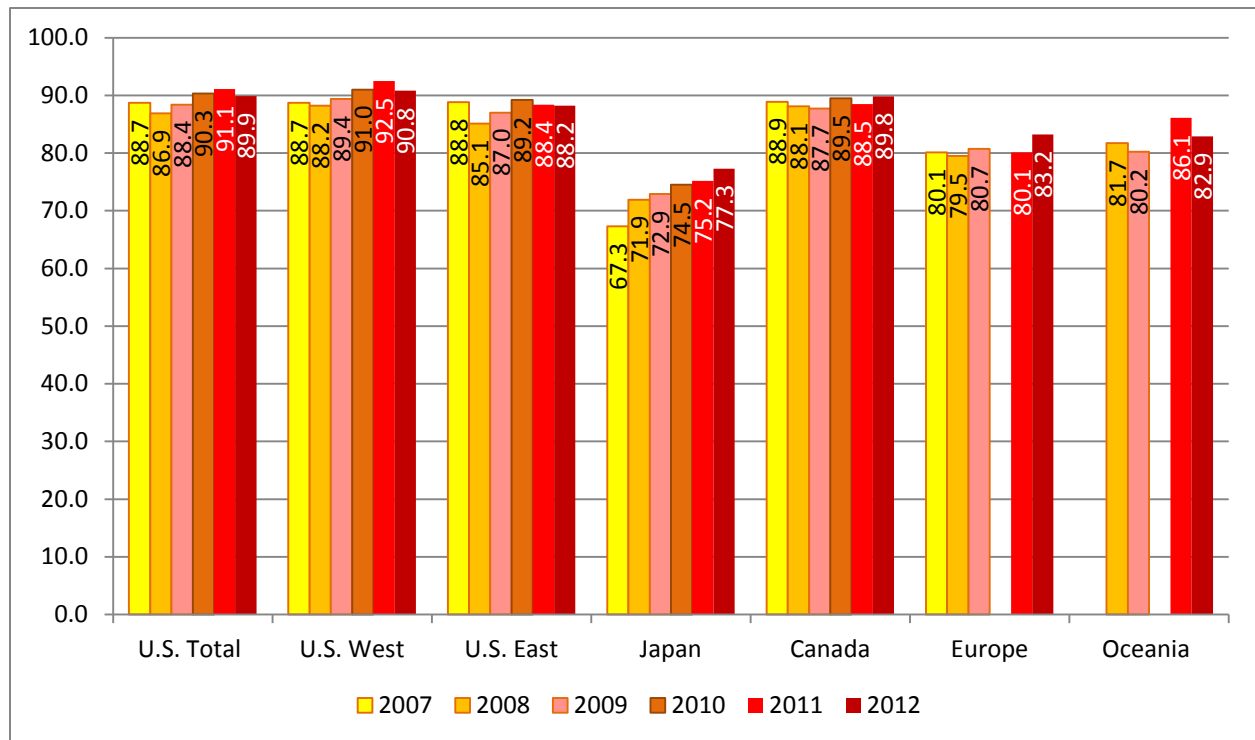
- Across all MMAs in 2012, the percentages of visitors who felt their trip exceeded their expectations were up slightly from 2011. Increases were recorded for our visitors from Canada (42.8%), Europe (44.3%), and Oceania (39.0%). Ratings for visitors from the U.S. West (34.7%), U.S. East (45.5%), and Japan (35.4) were very nearly the same as those reported in 2011.
- The trend for U.S. visitors rose from 2007 to a peak in 2010 and then leveled off. The steady rise in exceeded expectations among Japanese visitors from 2007 to 2011 ended this year at 35.4 percent. The four-year upward trend among our Canadian visitors continued this year to reach their highest point since 2007. Exceeded expectations also continued an upward trend this year for visitors from Australia and New Zealand (Oceania), reaching a high of 39 percent in 2012.
- Ratings among European visitors show no solid trend but their rating of 44.3 percent for 2012 was the second highest posted since 2008.

<sup>2</sup> 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 HAWAII

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. The majority of visitors surveyed in 2012 continued to respond that they would very likely recommend Hawaii to others (86.9%). Word-of-mouth is a critical aspect of Hawaii's marketing efforts because these referrals create more first-time visitors to Hawaii and encourage previous visitors to return.

**Figure 3: Very Likely to Recommend Hawaii to Friends and Relatives**  
[Percentage of visitors "Very Likely" to recommend Hawaii for vacation by MMA]



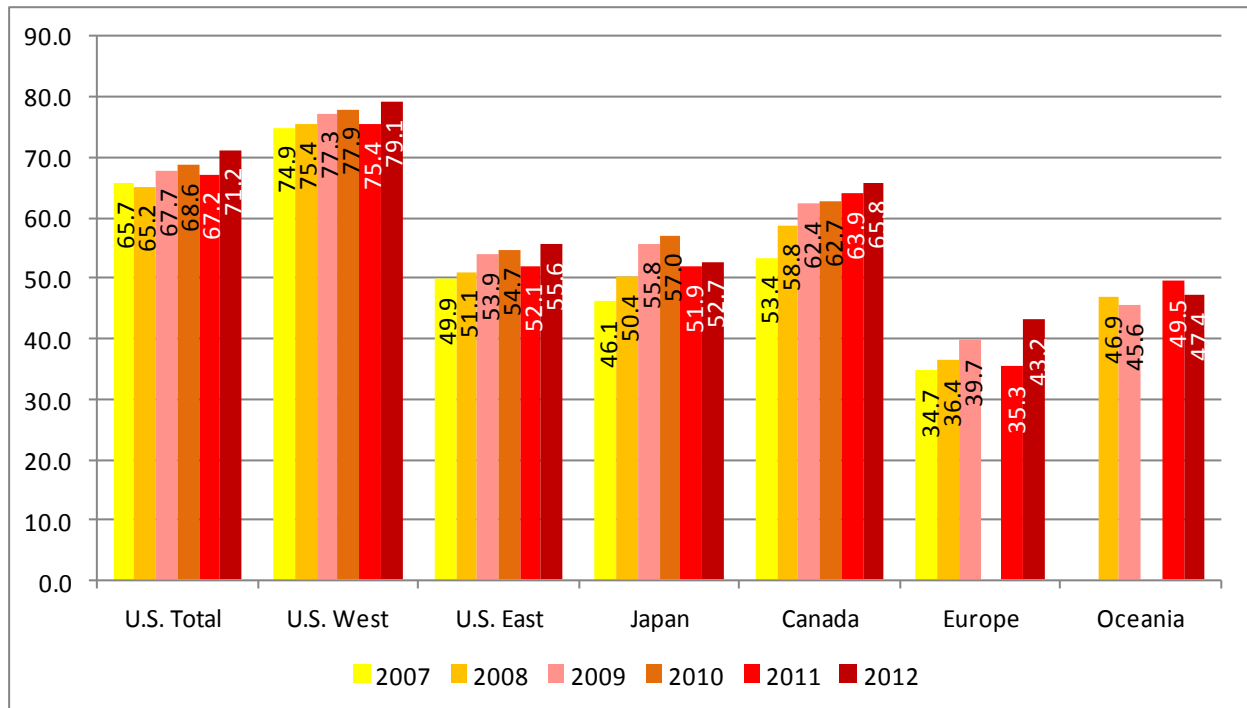
\*Visitors from Europe and Oceania were not surveyed in 2010.

- Over the past five years, the likelihood to recommend Hawaii to others remained relatively stable among U.S. West, U.S. East, Canadian, and European visitors. In 2012, this rating dropped about 2 points 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 Hawaii continued a six-year trend averaging two additional points per year.
- A slightly lower percentage of Oceania visitors (82.9%) were very likely to recommend Hawaii in 2012 than in 2011 (86.1%).

## 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 (65.5%) continue to indicate their intention to return in the near future.

**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. Ref. Tables 3.x – 3.y in the companion volume.

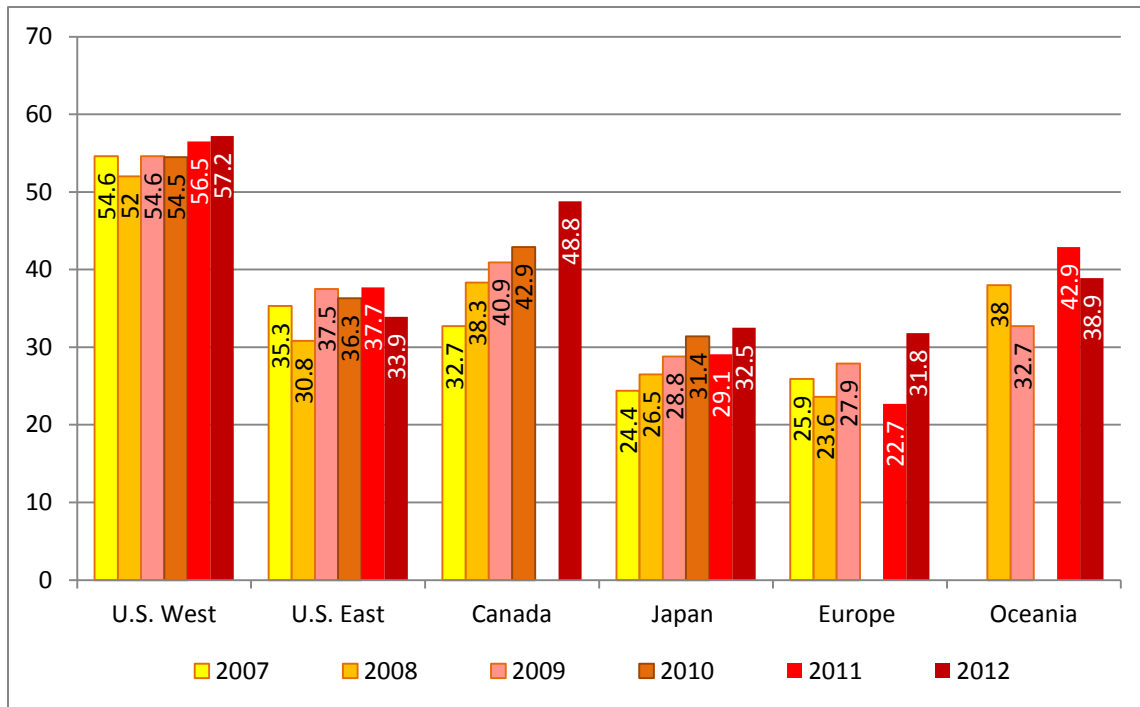
- Nearly 80 percent of U.S. West visitors in 2012 reported that they are very likely to revisit Hawaii in the next five years. This represents the largest percentage in the past six years.
- The percentage of U.S. East visitors who report they were very likely to return has always been lower than the percentage of U.S. West visitors. Ratings among U.S. East visitors was 55.6 percent in 2012 after a drop in 2011 (52.1%).
- The percentage of Japanese visitors indicating likelihood to return to the islands within the next five years was on an upward trend before 2011. The 2012 rating decreased by four points from 2010 and rose less than one point from 2011.
- Our Canadian visitors continue to report higher willingness to return to the islands each year since 2007. This year they posted a new high of 65.8 percent. European visitors have had a similar upward trend, this year reaching 43.2 percent after a drop in 2011.

- The percentage of visitors from Oceania who were very likely to revisit Hawai'i has been between 45 and 49 percent since 2008, and reached 47.4 percent in 2012.

## 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.

The percentage of all visitors who said they were very likely to return in five years was 65.5 percent in 2012, 55 percent of all visitors since 2007. In 2012, the percentages ranged from 43 percent among European visitors to 79 percent among U.S. West visitors (Figure 4). The percentage likely to return was closely correlated to distance from Hawai'i – the nearer the MMA, the greater the likelihood of returning. That pattern has been the same since 2007.

Among first-time visitors, a similar pattern persists. In 2012, about 41 percent of all first-time visitors reported they were very likely to return to Hawai'i in the next five years<sup>3</sup>. Again, the percentages ranged from a low of 32 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.

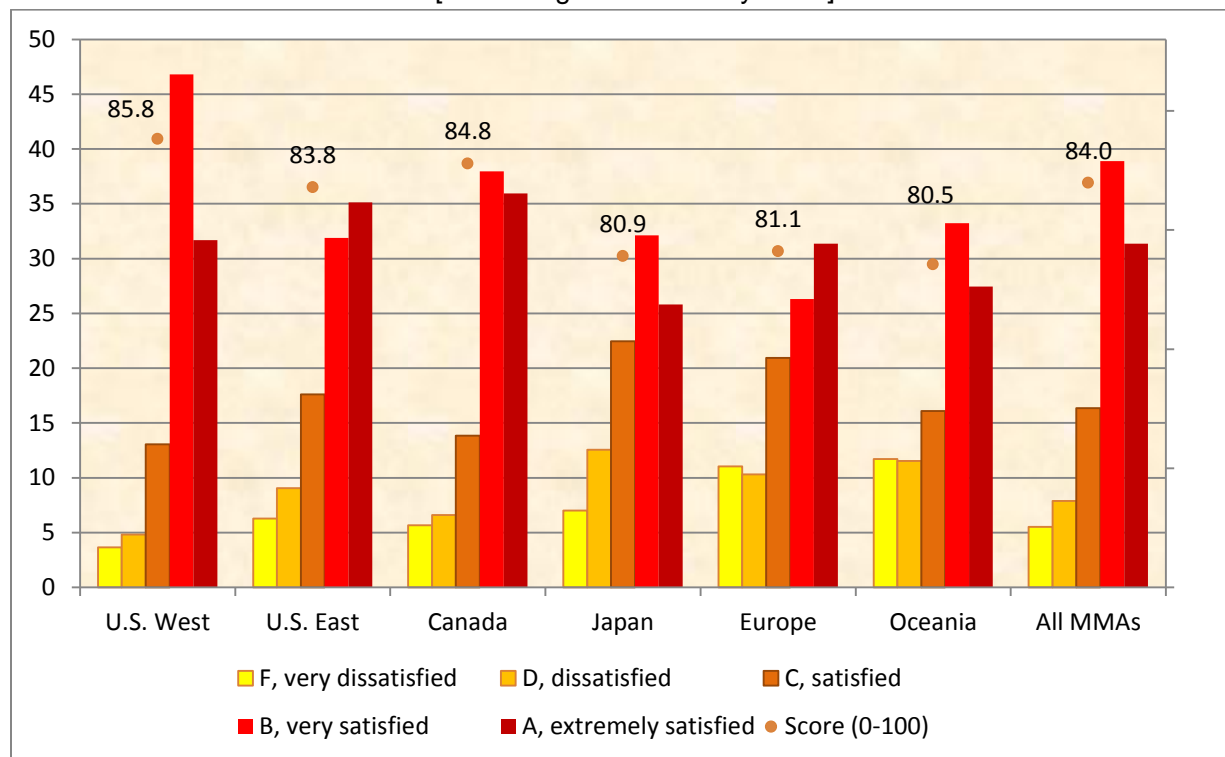
<sup>3</sup> Over the last six years, 38 percent said they were very likely to return.

In general, however, first-time visitors are less likely than average to be willing to revisit Hawai'i in the next five years. They were 17 points less likely in 2012 and about 16 points lower for the last six years. Trends for the first-time visitors from each of the six major MMAs are nearly identical to those for all visitors.

## SUMMARY SATISFACTION MEASURE

Combining all four of the VSAT satisfaction measures produces the summary satisfaction score. The summary measure was calculated in a slightly different manner in 2012. It takes the form of a grading system in which all four measures are combined in a scale from zero to 100, transformed to standard five-letter grading system<sup>4</sup>.

**Figure 6: Summary Satisfaction Score**  
[Percentage of Visitors by MMA]



The average summary satisfaction score for visitors from all six major MMAs in 2012 was 84.0. Visitors from U.S. West had the highest score (85.8) followed closely by visitors from Canada (84.8) and U.S. East (83.8)

<sup>4</sup> 90 to 100=A, 80 to 89 = B, 70 to 79 = C, 60 to 69 = D, and less than 60 = F. The summary measure was calculated as the average of the four satisfaction measures (overall satisfaction with the trip, met or exceed expectations, likelihood of recommending Hawai'i to friends and relatives, and likelihood of return to Hawai'i in the next five years) rescaled from zero to 100. In 2012, the VSAT overall satisfaction score was changed from a 4-point scale to an 8-point scale and the method of calculation was different from 2011. The 2012 summary satisfaction score is not comparable with summary scores (called "overall satisfaction") reported in 2011.

Visitors from the other three MMAs had summary satisfaction scores that were about five points lower: Japanese visitors (80.9), European visitors (81.1), and visitors from Oceania (80.5).

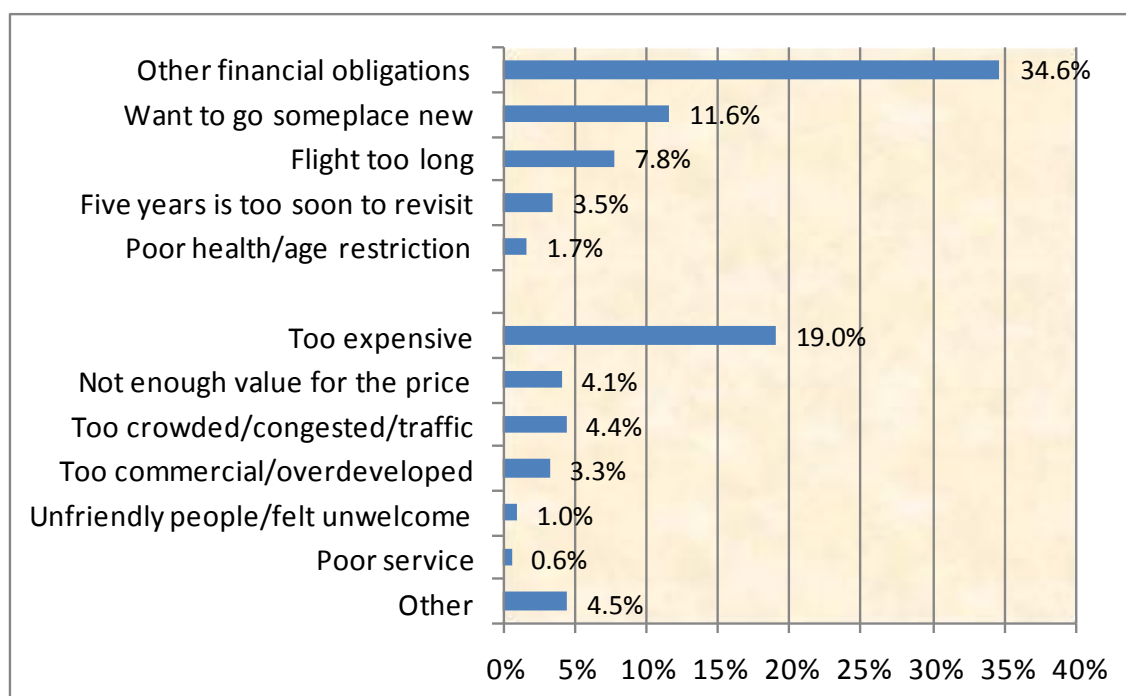
## REASONS FOR NOT REVISITING HAWAI'I

The VSAT survey asks respondents who do not plan to return to Hawai'i in the next five years why they made that decision. Their responses are shown in the figure below.

Response options for this question were changed slightly in 2012. We added an option for "too expensive." That tended to change the pattern of responses as it became clear that there was a distinction between "too expensive (Hawai'i is too expensive) and other financial obligations (I don't have the resources to fund another trip).

We consider two classes of reasons for not returning. One group of responses, which we might call barriers, refers to the respondent's situation and includes aspects of the choice that are not easily changed by a visitor destination. These include distance ("the flight is too long"), economics (I have "other financial obligations" that make it difficult to return), health ("poor health/old age"), and preference ("I want to go someplace new", "five years is too soon to return"). The other group, which we might call problems refer to the characteristics of the destination and must be addressed by industry planners. These include the respondent's perceptions that Hawai'i is too commercial or overdeveloped, the service received was poor, Hawai'i is crowded or congested, or that the trip is too expensive.

**Figure 7: Reasons for Not Revisiting Hawai'i – U.S. Visitors**



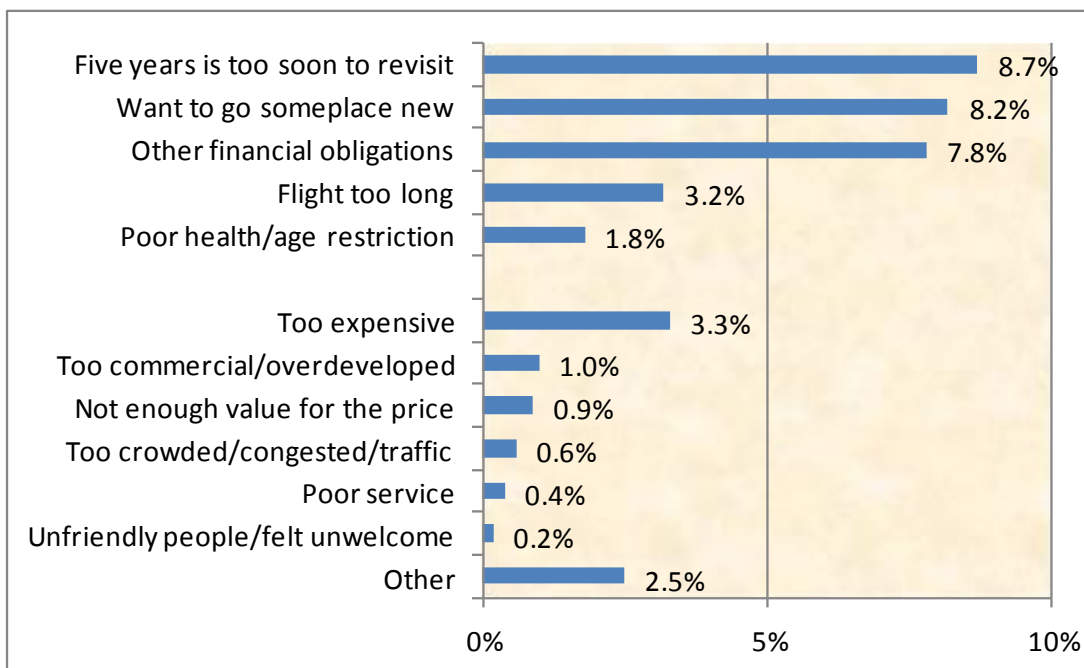
Percentage among visitors who were 'Not likely' to revisit Hawai'i in the next five years.



In 2012, about 10.8 percent of our U.S. visitors said they would not likely return to Hawai'i in the next five years. Of those, 59.2 percent mentioned barriers to return, and 36.9 percent mentioned problems with Hawai'i as a destination.

Many U.S. visitors not planning to return in the next five years said that it was because they have other financial obligations or simply want to go somewhere else. Note that the statistic reported for each reason for not revisiting Hawai'i is the percentage of those who were not likely to revisit Hawai'i (from previous section), rather than the percentage of all visitors.

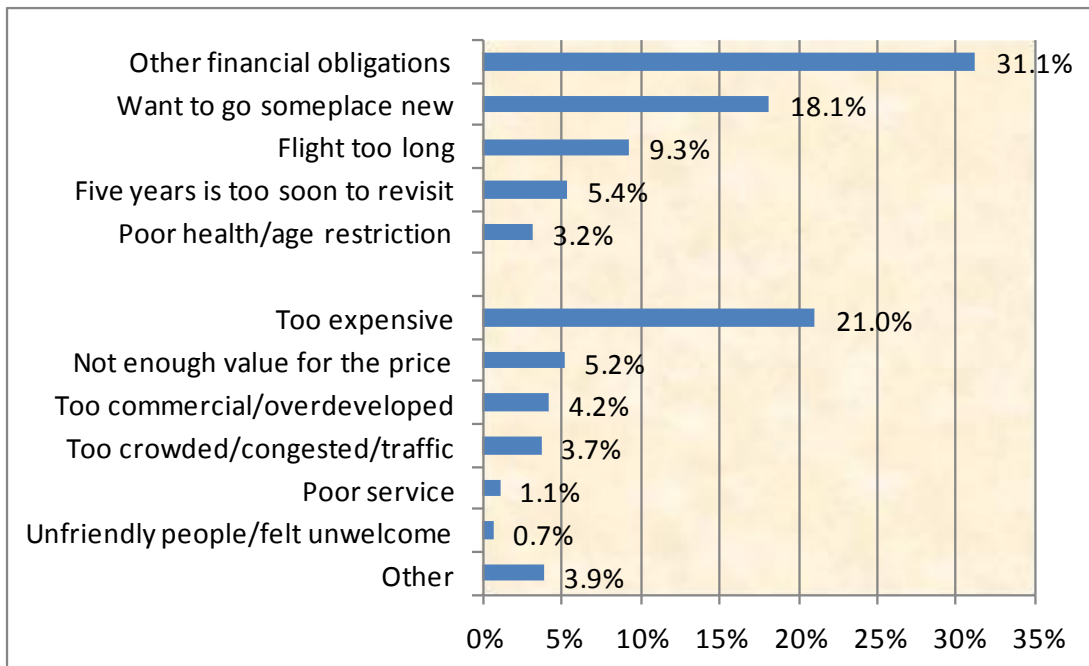
**Figure 8: Reasons for Not Revisiting Hawai'i – Japan**



Percentage among visitors who were 'Not likely' to revisit Hawai'i in the next five years.

While slightly fewer Japanese visitors indicated they would not be likely to revisit Hawai'i in 2012 (14.6%) than in 2011 (14.9%), those who were unlikely to return within the next five years most frequently reported that five years was too soon to revisit and cited a desire to travel to new locations. Competing financial obligations were also among the top reasons for not revisiting within the next five years.

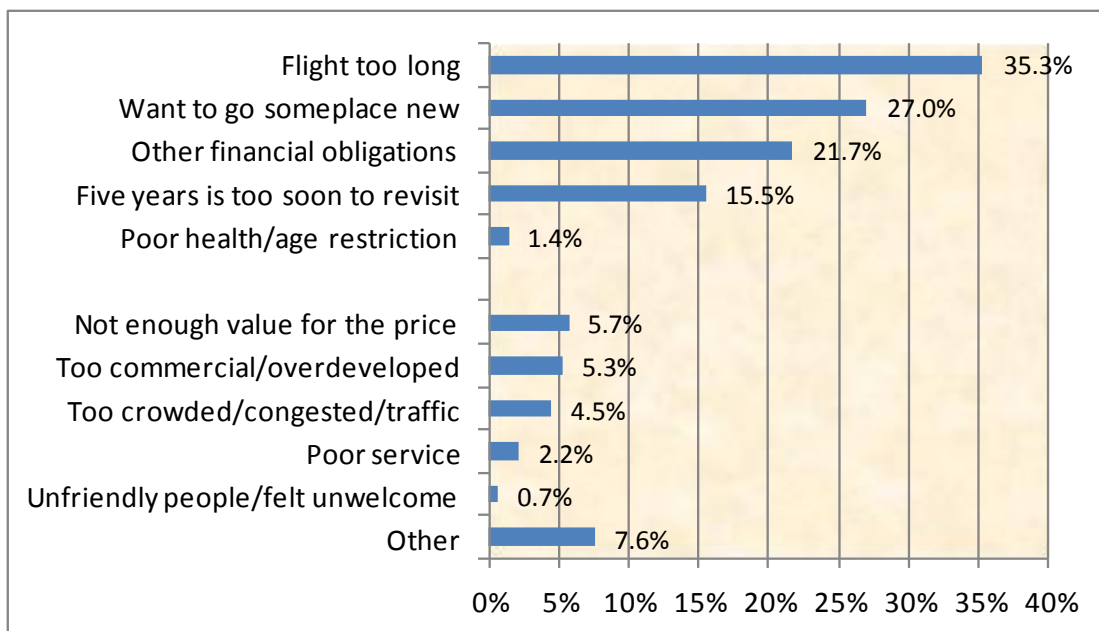
**Figure 9: Reasons for Not Revisiting Hawai'i – Canada**



Percentage among visitors who were 'Not likely' to revisit Hawai'i in the next five years.

In 2012, about 12.5 percent of Canadian visitors said they would not likely return to Hawai'i in the next five years. Of those, 31.1 percent mentioned other financial obligations and 18.1 percent cited a desire to travel some place new as the barriers to return. Twenty-one percent indicated that Hawai'i was too expensive to permit a return trip within the next five years.

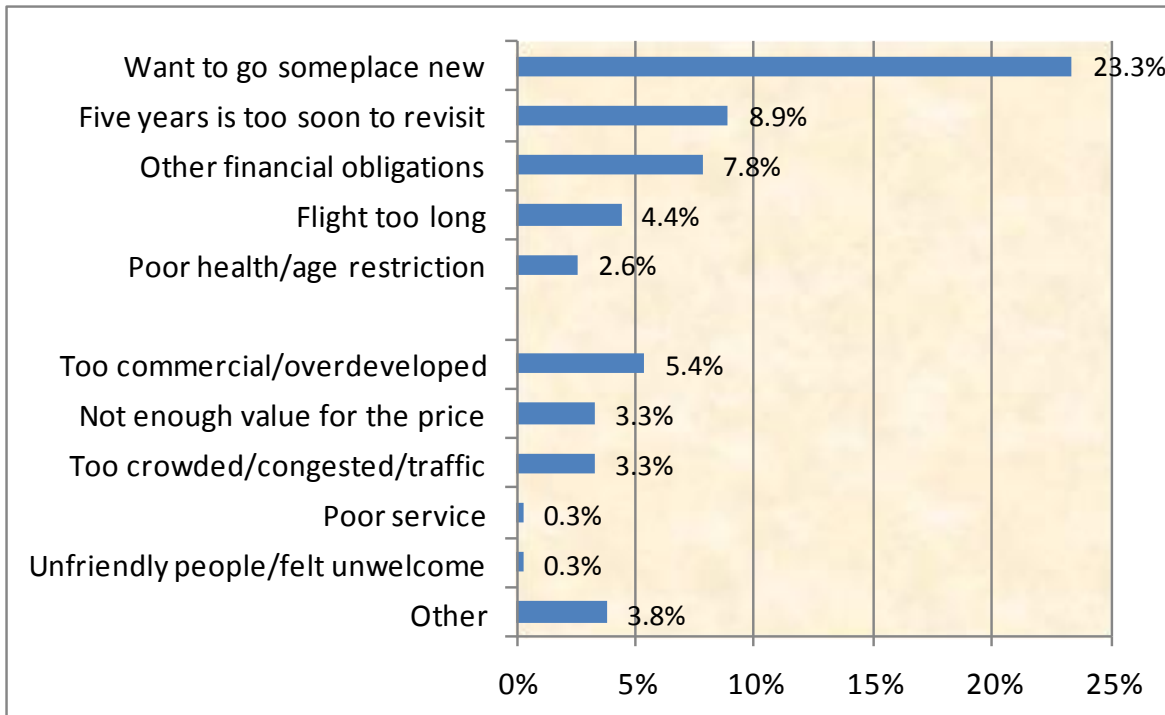
**Figure 10: Reasons for Not Revisiting Hawai'i – Europe**



Percentage among visitors who were 'Not likely' to revisit Hawai'i in the next five years.

Among visitors from Europe in 2012, reasons for not returning to Hawai'i in the near future were almost exclusively in the barriers category. The length of the flight, other financial obligations, and a desire to visit a new location accounted for the vast majority of respondents.

**Figure 11: Reasons for Not Revisiting Hawai'i – Oceania**



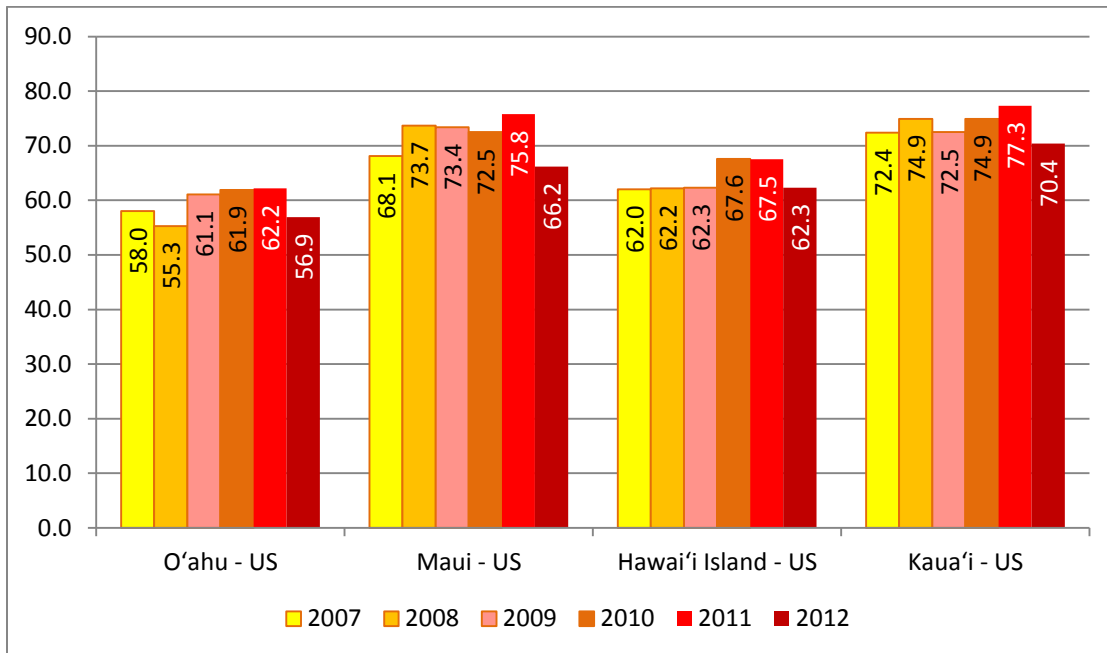
Percentage among visitors who were 'Not likely' to revisit Hawai'i in the next five years.

As was found for European visitors, visitors from Oceania indicated that the choice not to revisit Hawai'i within the next five years was primarily influenced by the desire to travel to a new destination. Competing financial obligations also played a significant role in their choice. Five percent or fewer of our Oceania visitors reported a problem with their trip that would prevent them from returning to the State in the near future.

## INDIVIDUAL ISLAND EXPERIENCE

Each island has unique characteristics, activities, and products that produce different visitor experiences. Beginning in 2006, VSAT has 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 are always lower than the overall satisfaction rate for their total Hawai'i experience (see Figure 1). Figure 12 shows island-by-island satisfaction rating among our U.S. visitors.

**Figure 12: Island Experience Rated as Excellent – U.S.**



Percentage of visitors by island.

In all years since 2007, U.S. visitors have given more excellent ratings to Maui and Kaua'i than to O'ahu and Hawai'i Island. Between 2007 and 2011, there was a slight upward trend in ratings for both of those islands. In 2012, excellent ratings dropped for both islands. U.S. visitor ratings were down 7 points for Kaua'i and almost 10 points for Maui.

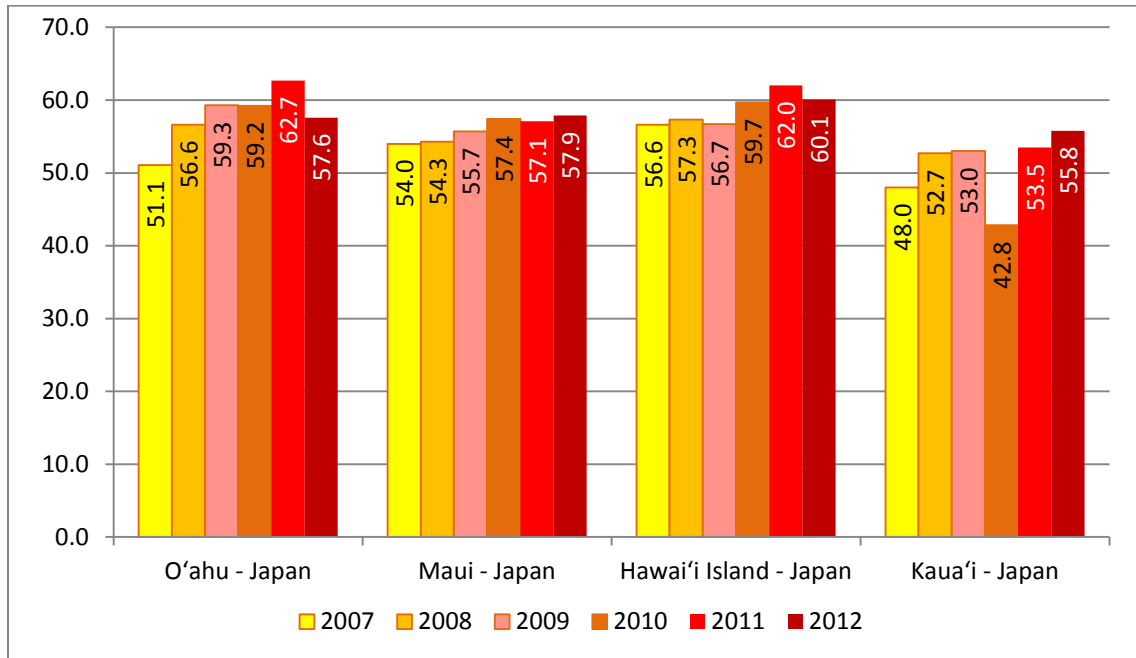
U.S. visitor ratings for O'ahu have been slightly lower than other islands since 2007. They were lowest again in 2012, dropping about five points since 2011.

U.S. visitor ratings of excellent for their experience on Hawai'i Island were steady at about 62 percent from 2007 to 2009; and then rose to nearly 68 percent in 2010 and 2011. In 2012, they fell back again to about 62 percent.

There were no changes to questions, response options, or survey procedures that might have affected the ratings in 2012.

Visitors from Japan have their own scale for measuring excellence. They have provided fewer excellent ratings for their overall Hawai'i experiences since 2007 (Figure 1). The same holds true for individual island excellence ratings. For all islands, the percentage of Japanese visitors who rated their island experiences as "excellent" is lower than for other MMAs.

**Figure 13: Island Experience Rated as Excellent – Japan**



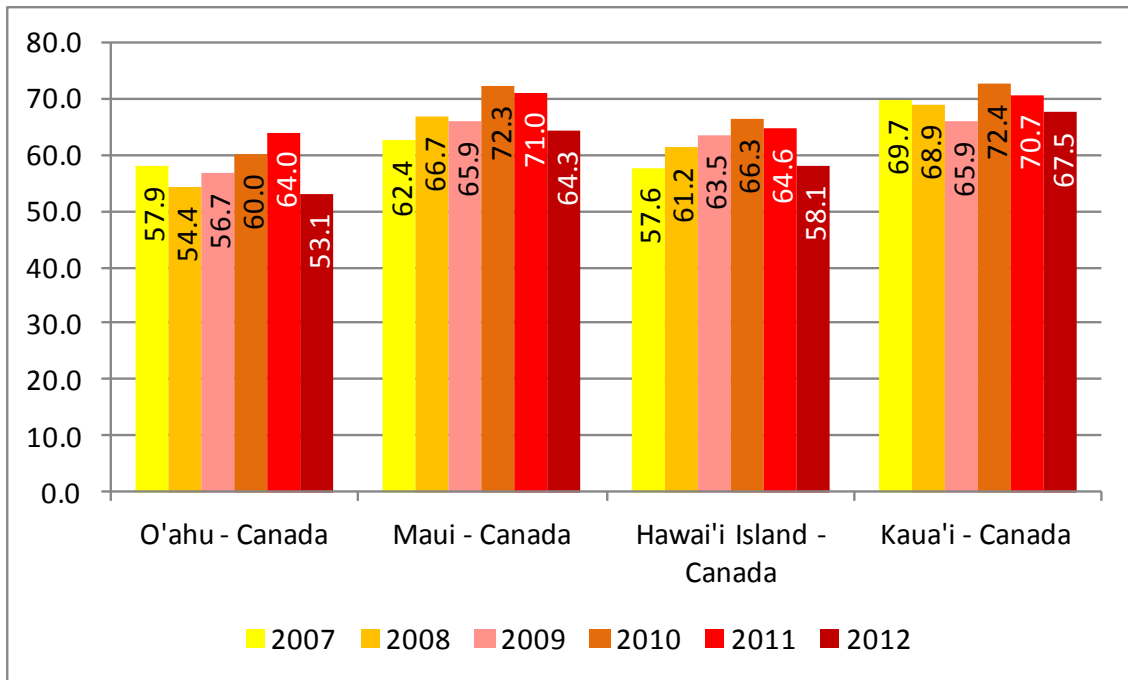
Percentage of visitors by island.

Among Japanese visitors, individual island ratings differed less than those reported by U.S. visitors. Their 2012 ratings for O'ahu, Maui, and Hawai'i Island are similar at about 57 to 60 percent. The trend for O'ahu was showing steady improvement between 2007 and 2011, but decreased by about five points in 2012. Trends for Maui and Hawai'i Islands have fluctuated by less than a point per year.

Japanese excellent ratings for Kaua'i have generally been lower than for other islands by five to ten points. With the exception of a very low rating in 2010, however, the trend has been toward better ratings since 2007. The 2012 rating was up again by about two points over 2011. We note that Japanese visitors are also less likely to visit Kaua'i than the other islands.

Visitors from Canada tend to rate their overall Hawai'i experience about average for the major MMAs (Figure 1). The same pattern has been observed for their "excellent" ratings between 2007 and 2012.

**Figure 14: Island Experience Rated as Excellent – Canada**



Percentage of visitors by island.

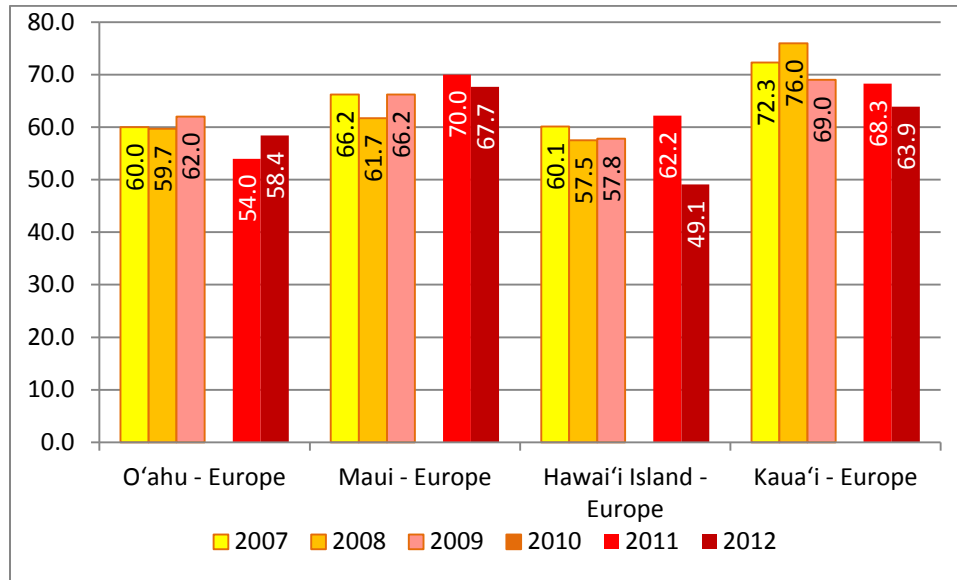
The general pattern for Canadian visitors' individual island ratings is similar to that seen among our U.S. visitors. Canadian visitors provide higher percentages of excellent ratings for Maui and Kaua'i than for the other two islands. In the case of Kaua'i, a downward trend existed from 2007 to 2009, before a 6.5 percent increase from 2009 to 2010. Since 2010, the percentage of excellent ratings have been decreasing. Canadian visitor ratings for Maui, on the other hand, were climbing steadily between 2007 and 2010 and then fell back almost seven points from 2011 and 2012.

Like U.S. visitors, Canadian visitors give their lowest excellent ratings to their O'ahu experience. The trend was rising from 2008 through 2011 but fell back this year to 53 percent – a decrease of 11 percentage points.

Since 2008, the percentage of visitors from Canada who rated their Hawai'i Island experience as excellent has been one to two points higher than their ratings for O'ahu. In a similar pattern Hawai'i's ratings rose between 2007 and 2010, then fell off a point in 2011 and dropped again in 2012, this time by three points.

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

**Figure 15: Island Experience Rated as Excellent – Europe**



Percentage of visitors by island. Visitors from Europe were not surveyed in 2010.

Our visitors from Europe were also more likely to declare their island experiences to be excellent if they visited Maui or Kaua'i. Their Maui ratings have averaged about 66 percent excellent each year. The trend has been relatively flat. Ratings dropped about two points between 2011 and 2012.

European visitor ratings for Kaua'i were highest across the four islands, but have been decreasing steadily since 2008. In 2012, the European visitor rating of Kaua'i reached its lowest point (63.9%) in six years.

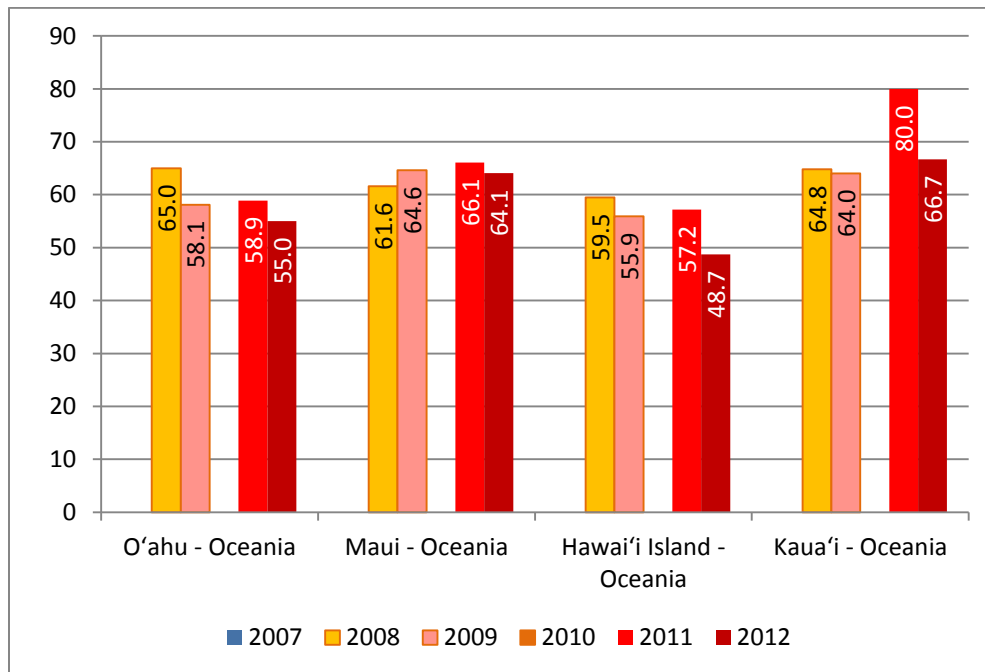
The percentage of European visitors who rated their O'ahu experience as "excellent" has averaged about 59 percent since 2007. No regular trend is evident in the data, but the 2012 rating (58.4%) was higher than the 2011 rating by more than four percentage points.

Ratings for Hawai'i Island among visitors from Europe have been relatively flat from 2007 to 2009, but decreased substantially (-13 points) between 2011 and 2012.



Visitors from Australia and New Zealand have rated their overall experience in Hawai'i a bit lower than any MMA except Japan. Their excellent ratings for individual island experiences are also a little lower than other MMAs.

**Figure 16: Island Experience Rated as Excellent – Oceania**



Percentage of visitors by island.

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

Visitors from Oceania gave their highest rating to the Island of Kaua'i in most years for which we have data. The percentage who rated their Kaua'i Island experience as excellent was 66.7 percent in 2012.

Maui ratings have also been high for visitors from Oceania and held steady at about 64 percent each year they were measured. Their rating for the O'ahu experience has been somewhat lower at about 58 percent. It has moved down for the past few years and reached a low point in 2012 at 55 percent.

Our Oceania visitors have given their lowest excellent rating to Hawai'i Island in every year for which we have data. In 2012, that rating fell to 48.7 percent, dropping more than eight points since 2011.

## 4. ACTIVITY PARTICIPATION

One objective of the VSAT is to monitor the activities of visitors to Hawai'i. Activities are the heart of visitor research. They are the important elements of the visitor experience and a measure of consumption of our tourism product. The fact that visitors choose to participate in a specific set of activities tells us something about their motives for being here and marks those activities as important targets for product development and improvement.

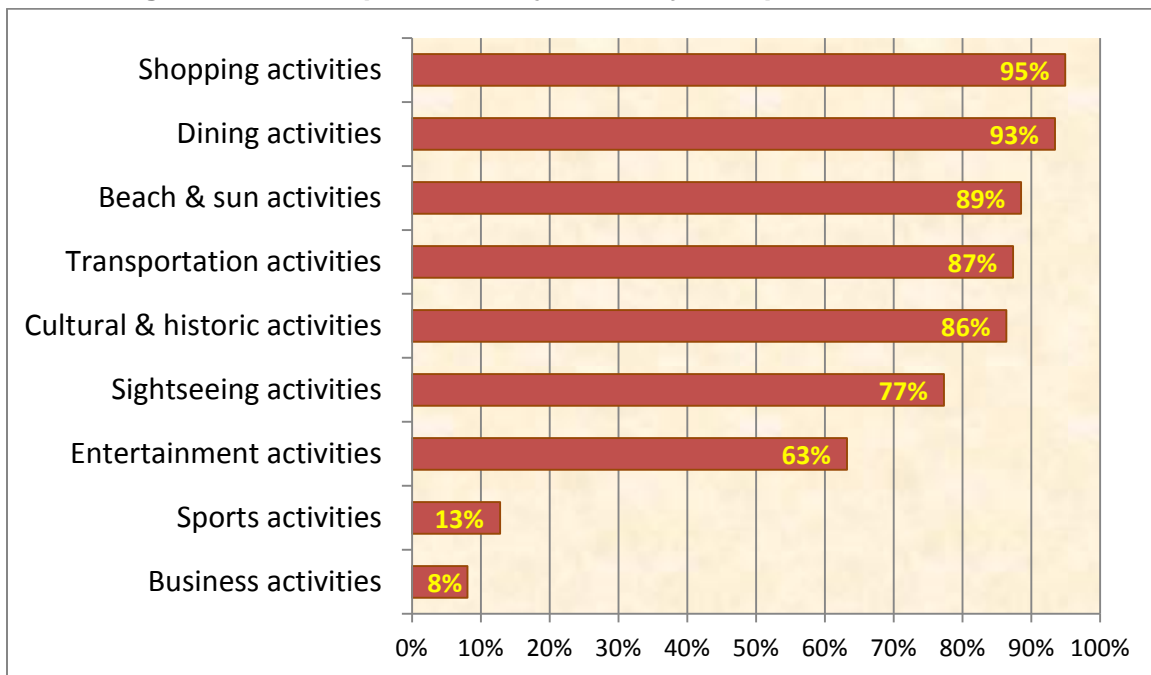
VSAT has expanded activity monitoring over the past years and now measures visitor participation for 54 different activities in seven different geographic areas of the State<sup>5</sup>. Data collected this year are substantially the same as in the past<sup>6</sup> and a complete set of data tables comparing 2011 and 2012 data has been included in the companion volume.

In this section, we examine visitor activities in nine activity groups, review the individual activities in each group, and consider participation across nine MMAs and six islands. For the first time, we will look at participation among visitors who come to Hawai'i and stay with friends and relatives.

### VISITOR ACTIVITY GROUPS

Nine groups of activities are shown in the figure below. The analysis is based on all 6,923,157 visitors covered by VSAT in 2012<sup>7</sup>. Percentages represent visitors who participated in at least one of the activities in the group at least one time during their 2012 visit to Hawai'i.

**Figure 17: Participation in Major Activity Groups, All Visitors, 2012**



<sup>5</sup> O'ahu, Maui, Kaua'i, Hilo, Kona, Molokai, and Lanai.

<sup>6</sup> Use of various types of transportation has been gathered in greater detail this year.

<sup>7</sup> Visitors from the U.S., Canada, Japan, Europe, and Oceania.

Nearly all (95%) visitors to Hawai'i did some shopping while they were here and 93 percent engaged in one or more of our list of dining activities<sup>8</sup>. Between 86 and 89 percent of all visitors took part in our next three categories. Beach and sun activities cover a list of vacation elements for which Hawai'i is well known. It includes all the beach and water activities as well as running, hiking, and backpacking. Transportation activities include activities from airport shuttle to Waikiki trolley ride. The cultural and historic group is a broad-ranging group covering many items that are unique to a Hawai'i visit. Broadly conceived, these activities provide an opportunity for visitors to experience Hawai'i's history, culture, and lifestyles.

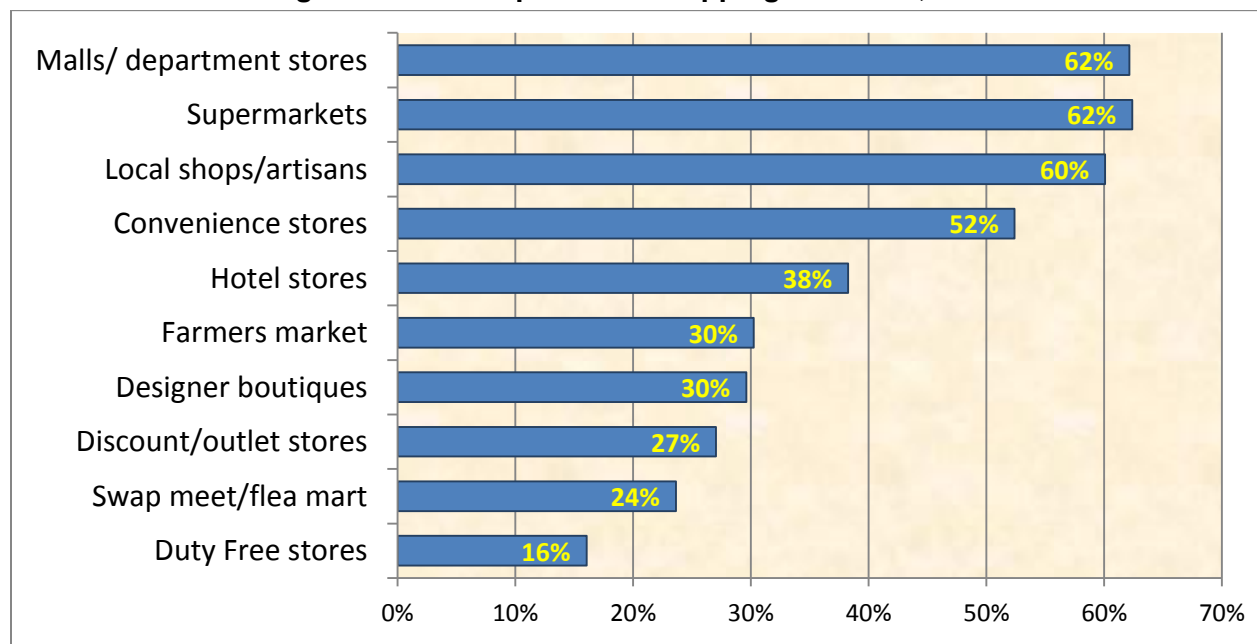
Two thirds to three-fourths of our visitors participated in entertainment and sightseeing activities. The entertainment group covers nightlife that might be available at other destinations. Entertainment that is uniquely Hawaiian has been included in the cultural and historic activities group. Sightseeing may be available at other destinations, but of course, all the sights would be unique to Hawai'i.

The last two groups are part of the Hawai'i visitor product. Business and sports-related activities were elected by 13 and 8 percent, respectively.

### Shopping Activities

Among the 95 percent of visitors who went shopping while they were in Hawai'i, the top two shopping choices were malls or department stores and supermarkets (62%). Shopping at local shops and artisans was close behind at 60 percent of all shoppers. The 52 percent who went shopping at convenience store includes those who went to the ABC stores in all of our resort areas, as well as those who stopped at local 7-11 stores and other small outlets.

**Figure 18: Participation in Shopping Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

<sup>8</sup> Surely all visitors dined while they were here, but some may not have engaged in any of the specific dining activities covered by the VSAT survey instrument, and some may have elected to skip the dining items altogether.

About 38 percent shopped at hotel stores. That was somewhat lower than the 63 percent of visitors who stayed in hotels during 2012. Some of the small hotels have no shops of this type.

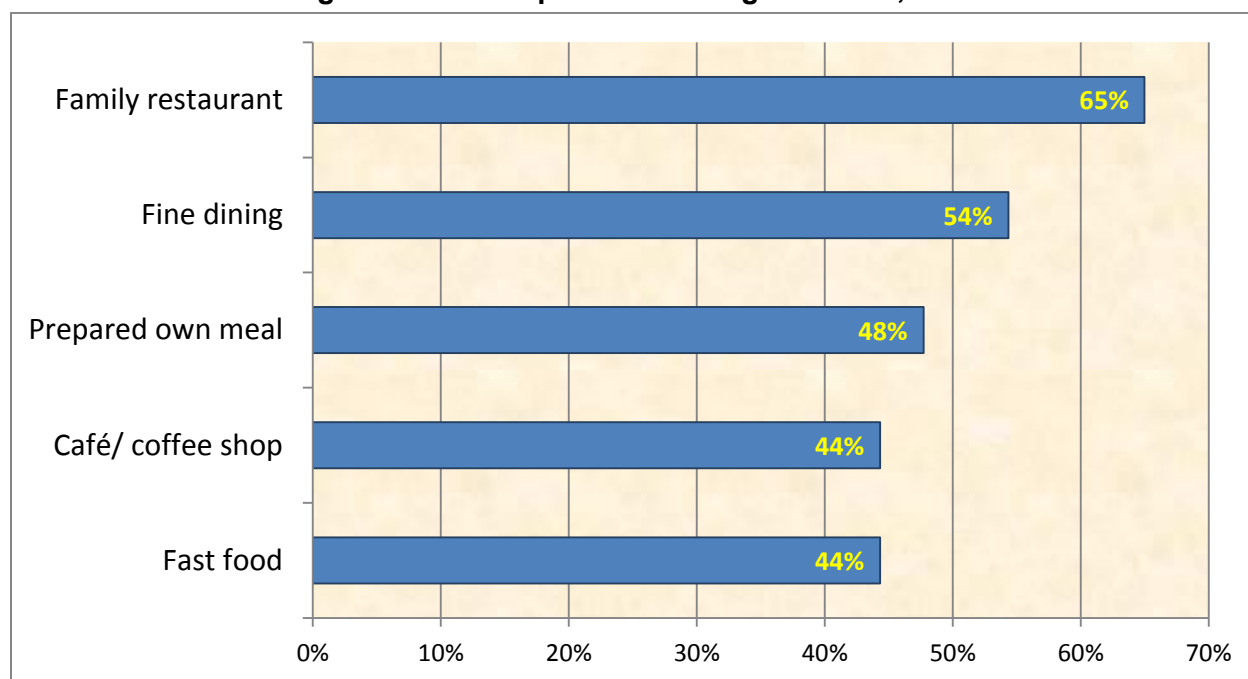
About 30 percent of our 2012 visitors shopped at farmers markets and the same percentage shopped at designer boutiques. Just less than that (27%) shopped at discount store or outlet stores. Less than a quarter of them (24%) visited our swap meets or flea markets.

Finally, 16 percent of our visitors shopped at Duty Free stores. About 34 percent of visitors covered by VSAT in 2012 were arrivals from foreign countries.

## Dining Activities

Among the 93 percent of visitors who reported dining activities this year, the most common dining experience may have been dining at our family-style restaurants. About 65 percent of all visitors reported dining at least once during their last trip.

**Figure 19: Participation in Dining Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

About 54 percent of all visitors ate at least once at Hawai'i's fine dining establishments. That suggests that as many as 46 percent of all visitors to Hawai'i in 2012 did not participate in fine dining at any time during their trip. Eating meals is not specifically a part of the Hawai'i visitor industry product. Fine dining in visitor destination areas, on the other hand, can be considered part of the visitor industry product. We plan for it, invest in it, and advertise it as part of the product. In 2012, about 54 percent of our visitors partook of that particular part of our product offering.

The same might apply to ethnic dining. It is a part of the visitor experience and part of planning, product development, and advertising in the visitor industry. In 2012, about 28 percent of all visitors dined at an ethnic restaurant at least once during their stay (Figure 23).

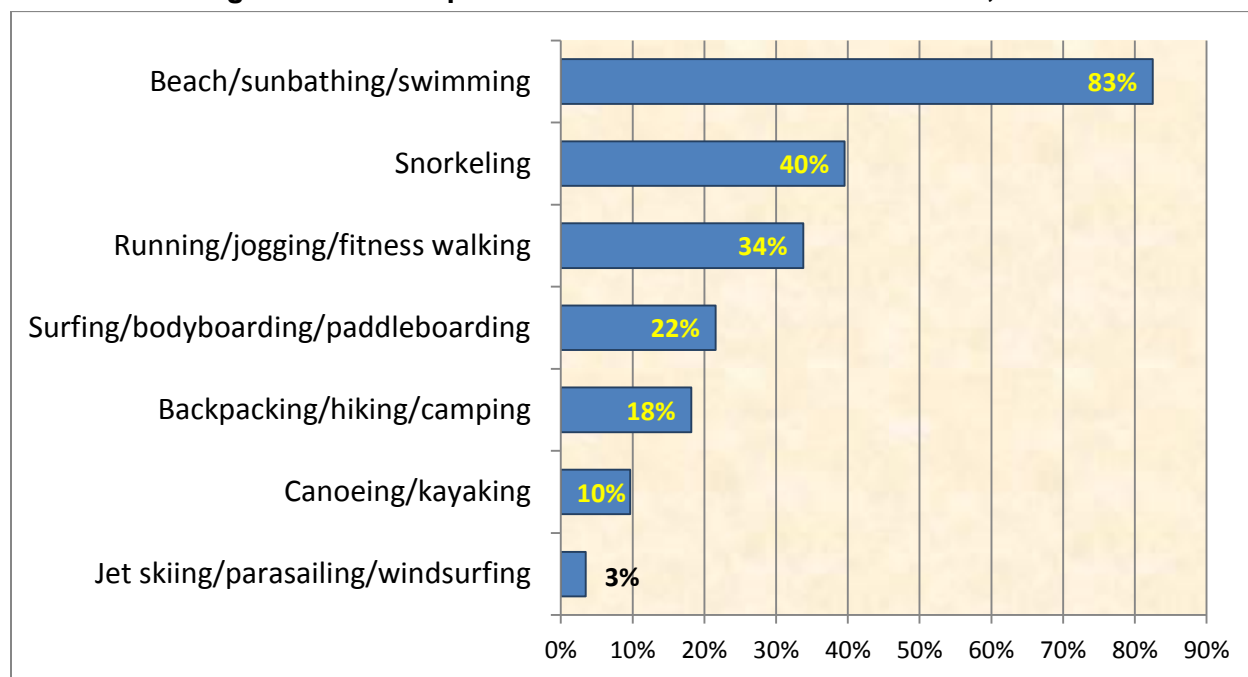
Other types of dining, such as fast food dining, are part of the visitor experience, but perhaps not a part of the visitor industry product. While the industry plans for a broad range of dining choices for our visitors, we do not spend heavily on developing fast food as an industry product, nor do we advertise fast food dining as an integral part of the brand. In 2012, 44 percent of all our visitors dined at a fast food restaurant at least once during their stay.

We should also note that almost half of our visitors (48%) prepared their own meals at least once during their stay in Hawai'i in 2012. About 43 percent of all visitors to Hawai'i in 2012 chose condominium, timeshare, or independent visitor rentals as their accommodations. All of those unit types include kitchen facilities.

### Beach and Outdoor Activities

Fully 89 percent of Hawai'i's 2012 visitors participated in some form of outdoor activities at least once during their stay. The most common of those activities include going to the beach, sunbathing, and swimming in the ocean. Going to the beach is still the major element of a Hawai'i vacation. About 90 percent of all visitors do some water-related activity and 83 percent of visitors go to the beach.

**Figure 20: Participation in Beach and Outdoor Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

Another 40 percent of our visitors put on a mask and snorkel while they were here and 22 percent tried surfing, body boarding, or paddle boarding. Fewer of them went canoeing or kayaking (10%) and 3 percent tried jet skiing, parasailing, or windsurfing.

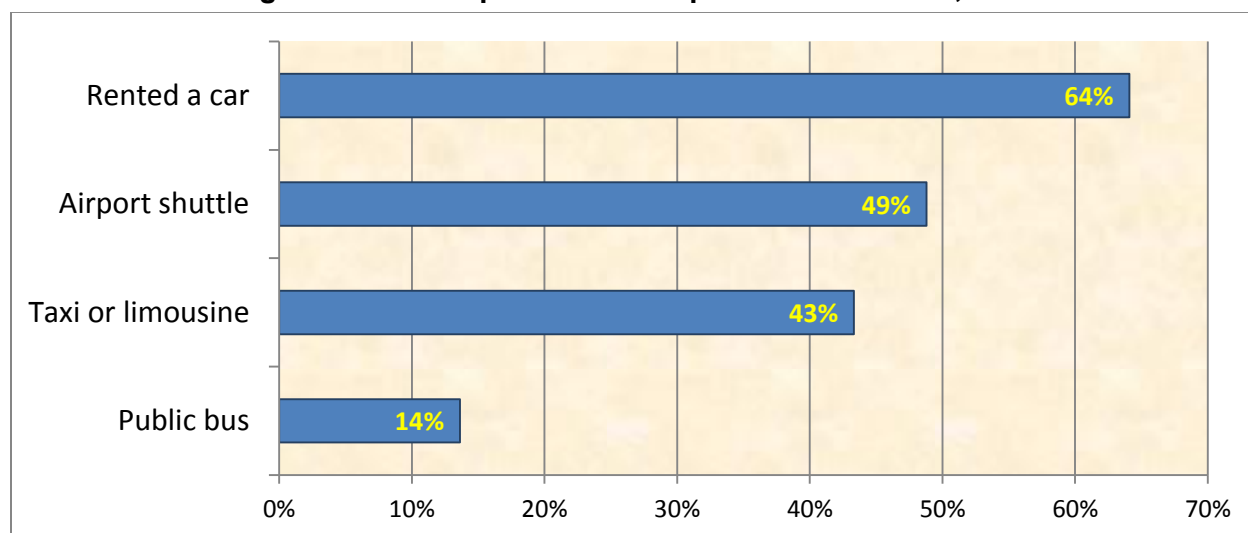
Non-ocean outdoor activities were also measured this year. The most frequent non-ocean activity was running, jogging, or fitness walking. About 34 percent of visitors did one or more of those at least once during their trip. Getting back into the mountains and valleys of Hawai'i attracted about 18 percent of our visitors as well.

### Transportation Activities

Ground transportation is another activity that is part of the visitor experience but perhaps a less important part of the visitor industry product. All visitors need access to transportation while they are here. The industry plans and invests in a range of transportation opportunities to fill that need. We usually do not position transportation as a specific part of the Hawai'i brand, nor do we advertise specific transportation modes.

About 87 percent of 2012 visitors reported using one or more of the transportation modes shown in the figure below. The most frequently reported transportation mode was the rental car. Almost two-thirds of our visitors rented a car on their last trip to Hawai'i.

**Figure 21: Participation in Transportation Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

Half (49%) of our visitors used an airport shuttle at least once during their visit and 43 percent used a taxi or limousine. About 14 percent of them rode on a local bus.

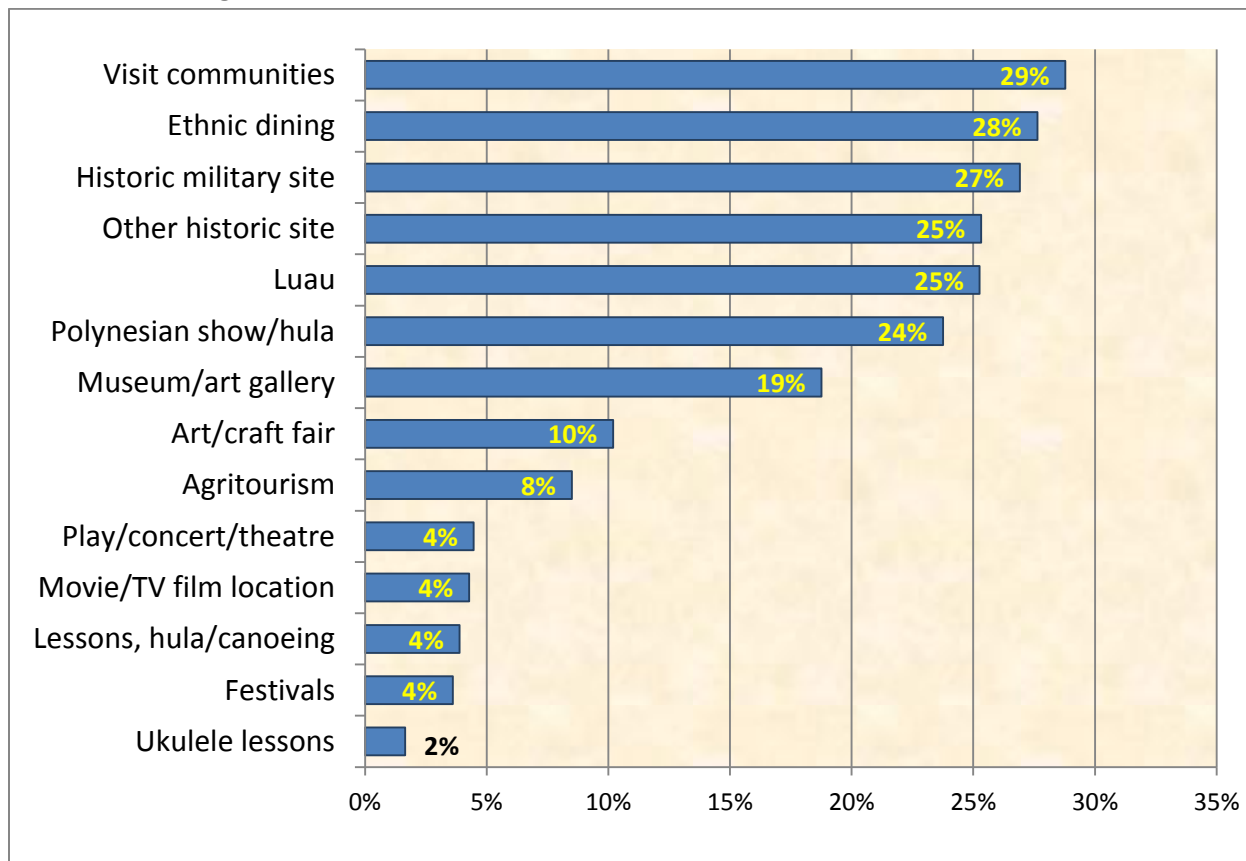
### Cultural and Historical Activities

In 2012, 86 percent of visitors to Hawai'i reported participating in at least one of the activities shown below at least once during their stay. Although some of the activities in this group were measured for the first time in 2012, all have been part of the Hawai'i visitor industry product for many years.

Unlike the activity groups we have presented so far, no single activity dominated this group. That means there were fewer activities per visitor for this activity group. The most frequently mentioned

activity on the list was “visiting communities”. The exact wording of the items was “visit local communities – Chinatown, Haleiwa, etc.” About 29 percent of our 2012 visitors reported engaging in that activity at least once during their stay.

**Figure 22: Participation in Cultural or Historical Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

As noted earlier, 28 percent of all visitors engaged in ethnic dining while were here, making that activity number two among cultural and historical activities. About 27 percent went to an historical military site (including Pearl Harbor and the USS Missouri) and 25 percent went to some other historical site. That makes historical sites collectively one of the more important visitor activities.

The luau and the Polynesian show or hula presentation each attracted about 25 percent of the visitors in 2012.

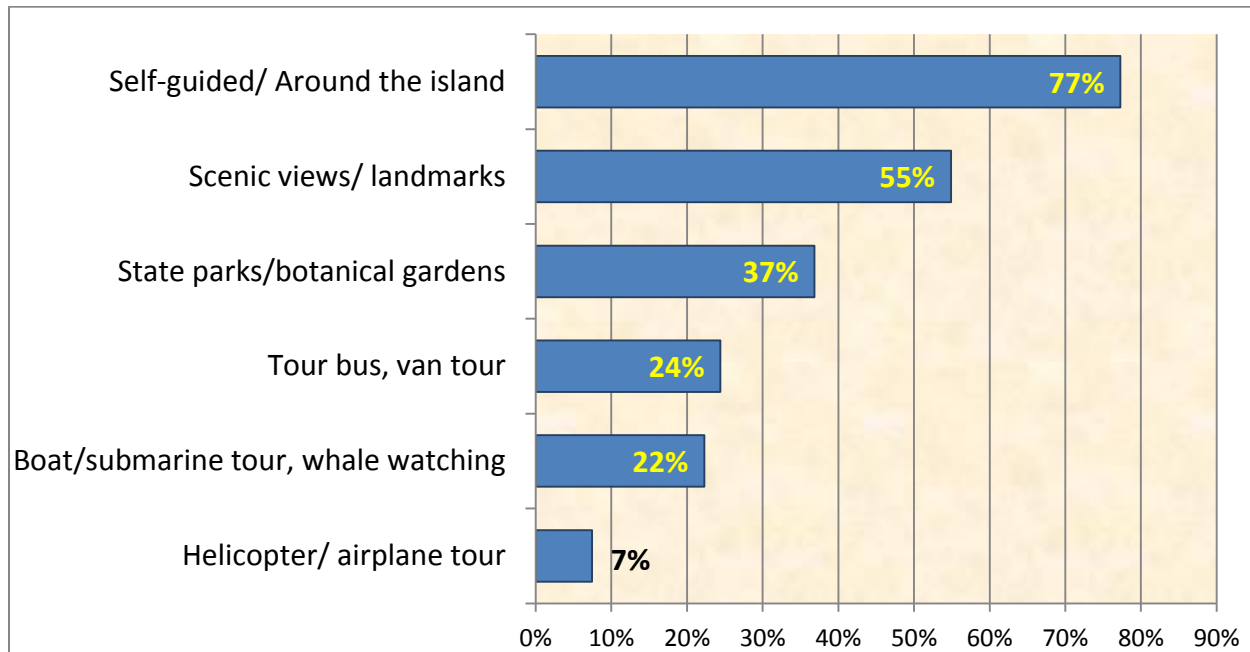
Hawai'i's museums and art galleries attracted almost twice as many visitors than did arts or craft fairs (19% vs. 10%). About eight percent of visitors participated in some form of agritourism while they were here. The remaining activities on the list each attracted less than five percent of our visitors in 2012.



## Sightseeing Activities

By all accounts, Hawai'i is one of the most beautiful places in the world and sightseeing has always been a popular visitor activity here. In 2012, 77 percent of our visitors reported doing at least some sightseeing while they were here.

**Figure 23: Participation in Sightseeing Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

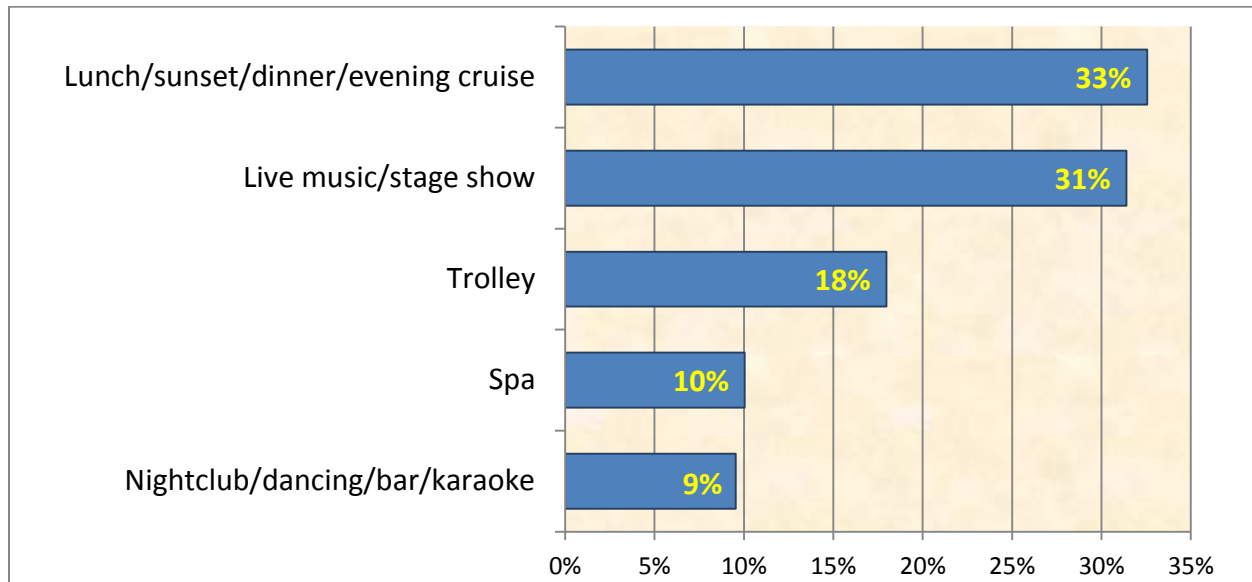
The primary sightseeing activity was a self-guided tour or a trip around an island. We see that 77 percent of all visitors reported that type of sightseeing at least once during their trip. That is higher than the 64.5 percent who reported renting a car, suggesting that some of the self-guided sightseeing may have been by bus or van, or perhaps that visitors borrowed cars to go sightseeing.

Sightseeing to look at scenic views and landmarks attracted more than half (55%) of all visitors and visits to state parks and botanical gardens were reported by about 37 percent. Less than a quarter of our visitors reported sightseeing by land (bus or van tours, 24%) and by sea (boat tours, submarine tours, whale-watching tours, 22%). Only seven percent reported going on a helicopter or airplane tour for sightseeing.

## Entertainment Activities

The entertainment activities group represents a set of activities that are clearly part of the Hawai'i visitor industry product. The industry devotes significant efforts to planning, developing and advertising entertainment opportunities in and outside of resort areas.

**Figure 24: Participation in Entertainment Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

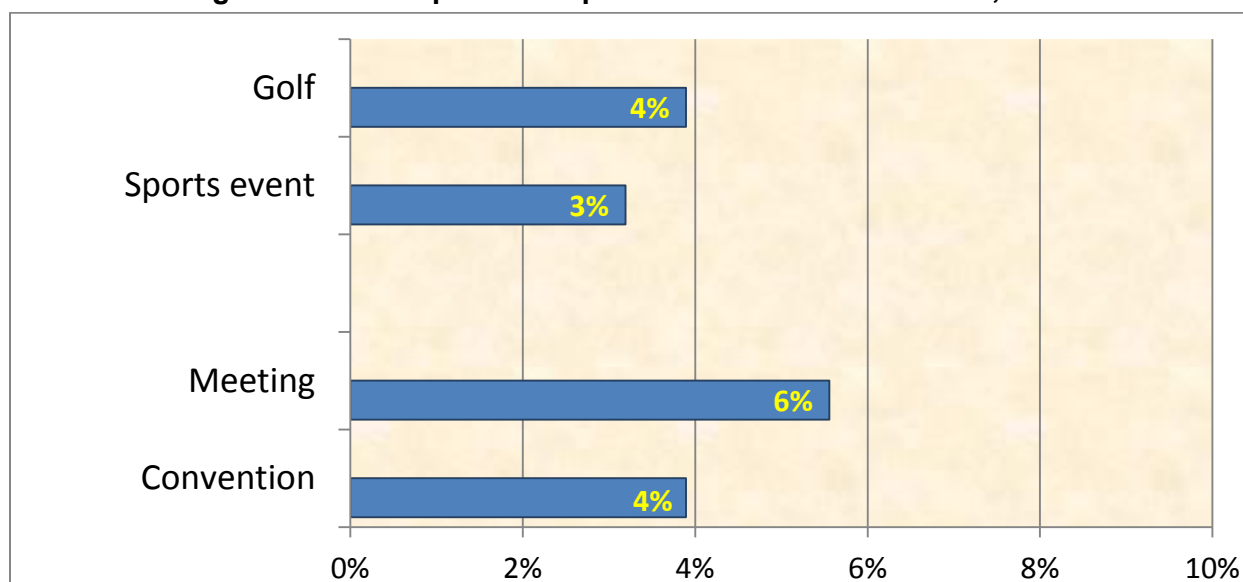
About 63 percent of all visitors reported participating in entertainment activities at least once during their most recent visit to Hawai'i. One third of all visitors (33%) took part in cruises, including lunch, dinner, sunset, and evening cruises. A similar number (31%) went to live music or stage shows. These two activities made up the bulk of entertainment reported in 2012.

Smaller numbers of visitors took a ride on a trolley (18%), spent some time at a spa (10%), or went "clubbing" (9%). The latter activity included nightclubs, dancing, spending time at a bar, or going to a karaoke place.

## Sports and Business Activities

In 2010, 12 percent of all visitors reported participating in some form of business activity while they were in Hawai'i. About eight percent of them said they attended a sports-related activity at least once during the trip. The business activities included business meetings (6%) and convention activities (4%). Sports activities in the VSAT list included golf (4%) and a sports event (3%).

**Figure 25: Participation in Sports and Business Activities, 2012**



Percent of all visitors to Hawai'i in 2012 who participated in each group of activities at least once during their trip.

## VISITOR ACTIVITIES BY MMA

A look at activity levels across major MMAs reveals some interesting activity profiles. All groups shopped at similar levels and most participated in dining activities at the same high rates. Activity patterns for other activity groups show interesting differences.

Canadian visitors had the highest activity levels overall, leading or tied in all activity groups except entertainment where they were second lowest at 61 percent. Their very high use of cultural and historical activities were led by higher than average use of local shops and artisans (75% vs. 58%), visiting communities (39% vs. 28%), non-military historical sites (33% vs. 25%), and luaus (33% vs. 25%).

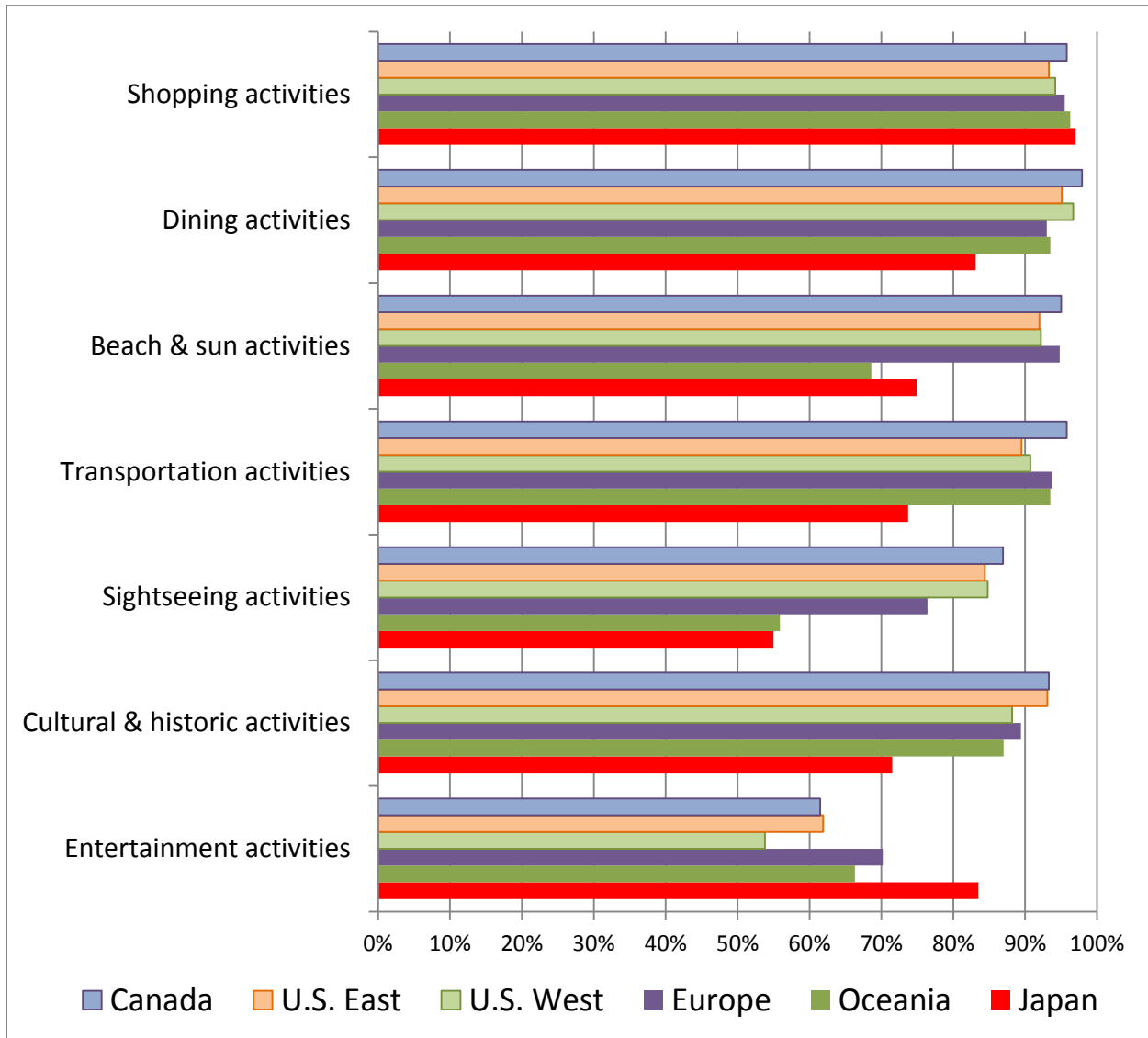
U.S. East visitors were very active overall. They were among the top three MMAs for dining, cultural and historic activities, and sightseeing. They had the lowest participation rate for shopping. Their high rate for cultural and historical activities was led by higher than average participation in luau (41% vs. 25%), historic military sites (40% vs. 26%), local shops and artisans (69% vs. 58%), and ethnic dining (35% vs. 27%).

The activity profile for U.S. West visitors was similar to that for the U.S. East MMA. They were slightly higher than U.S. East on shopping and dining activities. U.S. West visitors had lower than average scores for bus and van tours (11% vs. 24%), but higher than average scores for self-guided sightseeing (85% vs. 77%) and visiting state parks and botanical gardens (41% vs. 36%).

Visitors from Japan had a unique profile. They had lower participations rates for dining activities, transportation, sightseeing, and culture and historical activities. Only the visitors from Oceania had lower participation rates for beach and outdoor activities. On the other hand, the Japanese participation rate was 20 points higher than average for entertainment. Their very low rating for beach and other outdoors activities found them about average for jet skiing, but notably lower on all

other outdoor activities. An average of 17 percent of all visitors went snorkeling or scuba diving on their 2012 visit and Japanese visitors matched that level exactly. Participation in cultural and historical activities was low due to lower than average participation in nearly all cultural activities, especially visiting local shops and artisans (23% vs. 58%), luau (3% vs. 33%), museums and art galleries (8% vs. 33%), and ethnic dining (11% vs. 29%).

**Figure 26: Visitor Activities by MMA, 2012**



Sports activities and business activities were excluded from this figure.

Visitors from Europe were in the top three for beach and sun, entertainment, and cultural and historic activities. They were in the bottom three for sightseeing and dining. Their participation rates for non-beach activities were relatively low, but their very heavy participation in beach and ocean activities overcame that deficit.

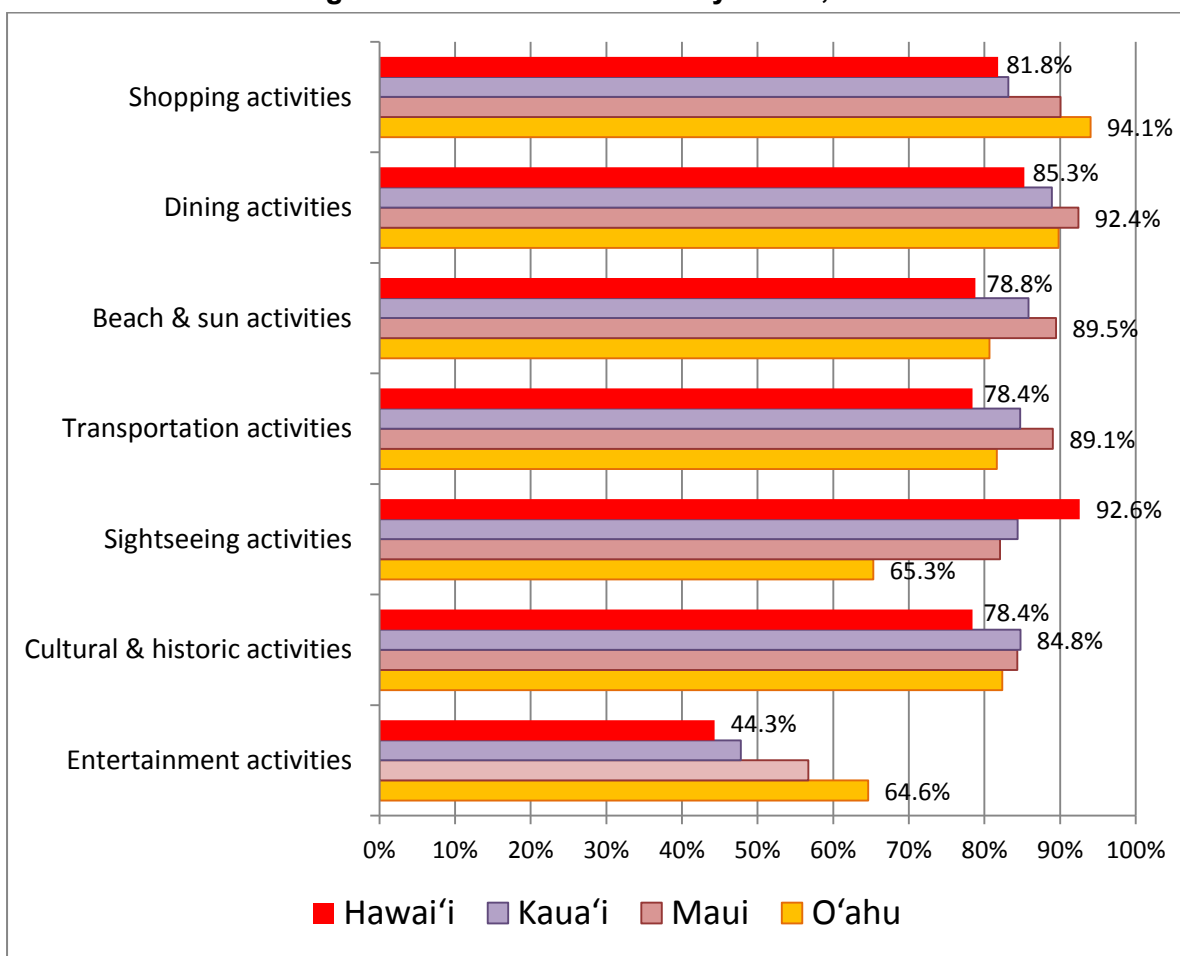
Visitors from Oceania were among the top three MMAs for shopping and transportation, but among the bottom three for dining, sightseeing, cultural and historical activities. They had the lowest percentage participating in beach and outdoors activities (68%). Their shopping percentages were

high because of higher shopping rates for swap meets and discount stores. Participation in beach and outdoor activities was lower than average. Visitors from Australia and New Zealand were especially low for snorkeling and scuba diving (25% vs. 40%) and for backpacking, hiking and camping (6% vs. 18%).

## VISITOR ACTIVITIES BY ISLAND

Activity levels for individual islands in the State were calculated separately for each island. The figures 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 island<sup>9</sup>.

**Figure 27: Visitor Activities by Island, 2012**



Sports activities and business activities are excluded from this figure.

Visitors to O'ahu had the highest participation rates for shopping and entertainment. O'ahu took second place for dining activities at 90 percent. They had the State's lowest participation rate for sightseeing activities (64%).

<sup>9</sup> Activities were measured separately for Moloka'i and Lana'i, but have been omitted here due to low sample sizes. The individual data for each of 54 activities for each of six islands is reported in the companion volume. Note that the data reported here for "Maui" refer to activities on the Island of Maui and those for Hawai'i refer to activities on Hawai'i Island.

Maui had very high percentages of visitors participating in most activities. They had the highest activity rates for dining, beach and outdoors activities, transportation activities, and were tied for first place for cultural and historical activities. None of the Maui participation rates was unusually low.

Kaua'i participation rates were higher than average for the State as a whole. They had the highest participation rates for cultural and historical activities and were second for beach and other outdoors activities, transportation, and sightseeing. Kaua'i's participation rate for entertainment activities was relatively low (47%).

On Hawai'i Island, participation rates were the lowest of the four islands covered here. The rate for sightseeing was the highest in the State, perhaps because of the attraction of volcanic activity. All of the other activity groups found Hawai'i island in last place,

## ACTIVITIES FOR VISITORS STAYING WITH FRIENDS AND RELATIVES

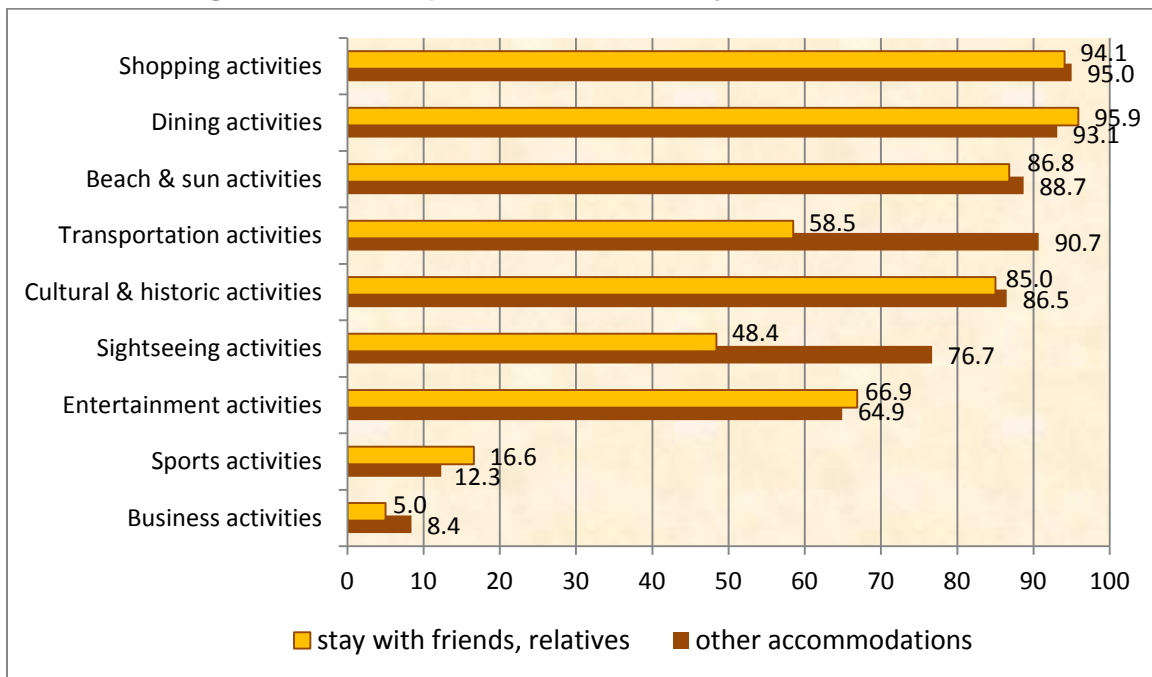
Starting with the VSAT Annual Report 2012, we will examine visitor activities among interesting subgroups of our visitor population. For 2012, we selected visitors who stay with friends and relatives. Past analysis of purpose of trip suggests that those who travel to visit friends and relatives (VFR) have different patterns of destination choice, travel planning and behaviors, visitor activities, expenditures, and visitor satisfaction ratings. It has been reported that some visitor destinations remove VFRs from their research and planning data, and that others develop separate product development and communications plans for VFR and non-VFR travelers.

In the analysis presented here, we will concentrate on visitors who stay with friends and relatives for at least part of their visit to Hawai'i. When we looked at purpose of trip, we did find differences between the characteristics and behaviors of VFR and non-VFR visitors in 2012. However, we found greater differences when we compared those who stayed with friends and relatives (SWFR) and those who stayed in other accommodations.

In 2012, 10.3 percent of our visitors stayed with friends and relatives for at least part of their trip. The remaining 89.7 percent may have visited friends and relatives while they were here, but used other accommodations on all islands on which they stayed overnight or longer.

The next figure presents visitor activities for these two groups in 2012. For the most part their participation rates were similar. SWFR visitors were less likely to have engaged in any of the transportation activities on our list (see Figure 18). We suspect that is so because their friends and relatives meet them at the airport and provide for their transportation needs while they are here. They were also much less likely to engage in the sightseeing activities on our list (see Figure 20). That may be because they go sightseeing with their friends and relatives or because they are familiar with Hawai'i and have already seen the sights.

**Figure 28: Participation in Activities by Accommodations**



There were smaller differences for the activity groups not related to transportation and sightseeing. SWFR visitors had slightly higher participation rates for dining, entertainment and sports activities. For all others, the participation rates were two or three points lower than for those who did not stay with friends and relatives.

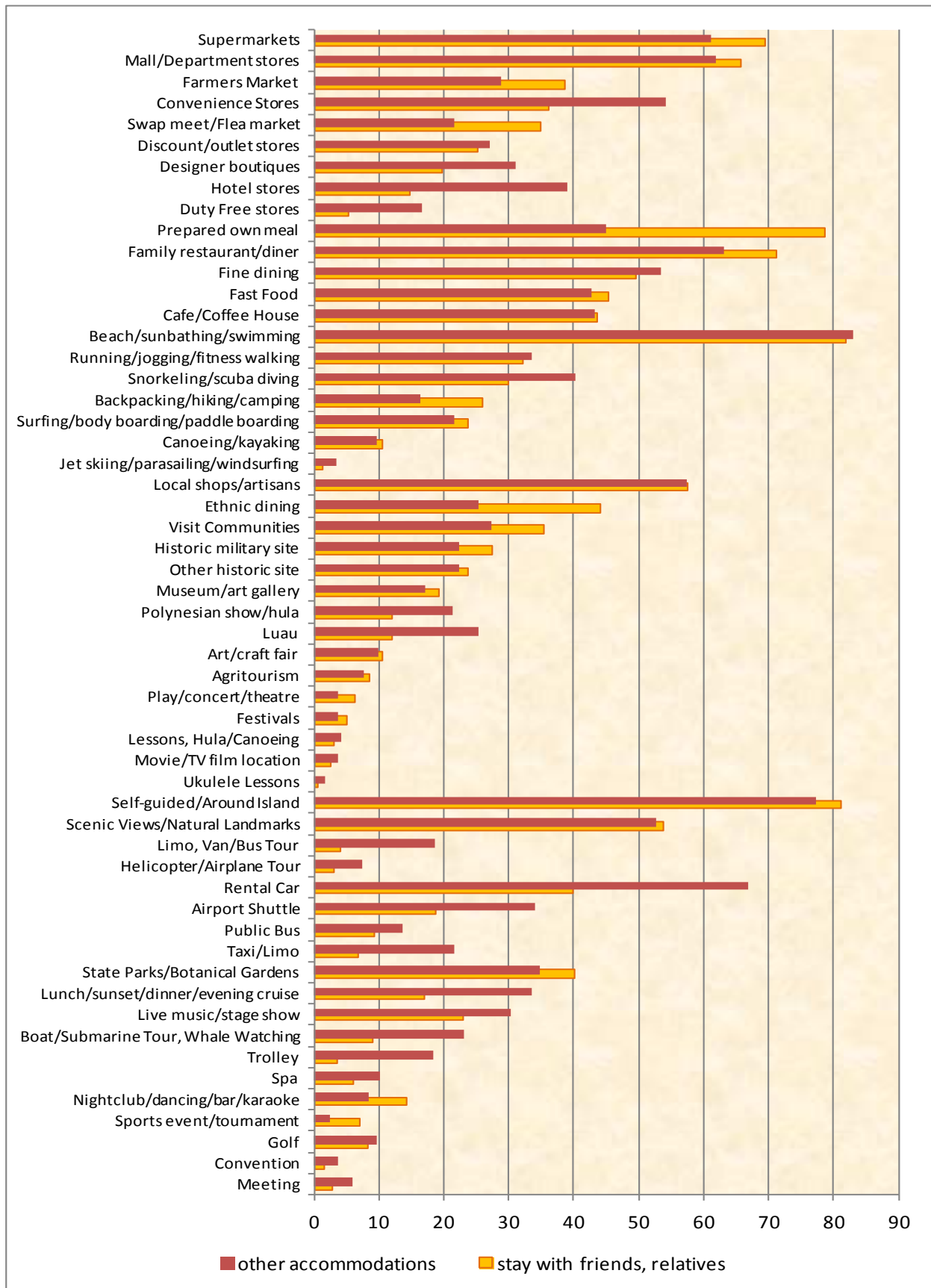
Figure 30 on the following page presents the full list of 54 activities measured in the 2012 VSAT survey. The items have been arranged in the same order as in Figure 28. The individual items that make up each activity group were sorted in descending order according to the activity level of those who do not stay with friends and relatives (red bars).

Activities in which SWFR visitors participated more than other visitors are those for which the gold bars extend beyond the red bars. We see for instance that SWFR visitors were more likely to prepare their own meals (79% vs. 44%). They were also more likely to do some ethnic dining (42% vs. 26%) and go to family restaurants (72% vs. 64%). They were a little less likely to go out to a fine dining restaurant (55% vs. 48%).

SWFR visitors shopped less than their non-SWFR counterparts did. They were more likely to shop at a flea market (31% vs. 23%), a farmers market (38% vs. 29%), or a supermarket (69% vs. 62%). SWFR visitors were just a bit less likely to participate in beach or other outdoor activities, but were more likely to go backpacking, hiking or camping (26% vs. 17%), or to go surfing, body boarding or paddle boarding (24% vs. 21%).

Entertainment participation rates for SWFR visitors were higher than for non-SWFR visitors, especially due to their participation at nightclubs, bars, or karaoke places (15% vs. 9%).

**Figure 29: Statewide Activity Participation, All Visitors, 2012**





As we have noted, SWFR participation rates in sightseeing were much lower than for other visitors. Nevertheless, they were more likely to take a self-guided drive around the island (83% vs. 76%) and to visit local communities like Chinatown or Haleiwa (32% vs. 27%).

Finally, SWFR visitors were more likely than their non-SWFR counterparts to take in a sports event while they were here (9% vs. 3%).

As expected, SWFR visitors were considerably less likely to rent a car (46% vs. 67%) or take an airport shuttle (22% vs. 35%) or a taxi (8% vs. 23%). Their shopping activities differed, too. They were less likely to shop in hotel stores (15% vs. 41%) or convenience stores (36% vs. 54%) or to shop at a Duty Free store (6% vs. 17%).

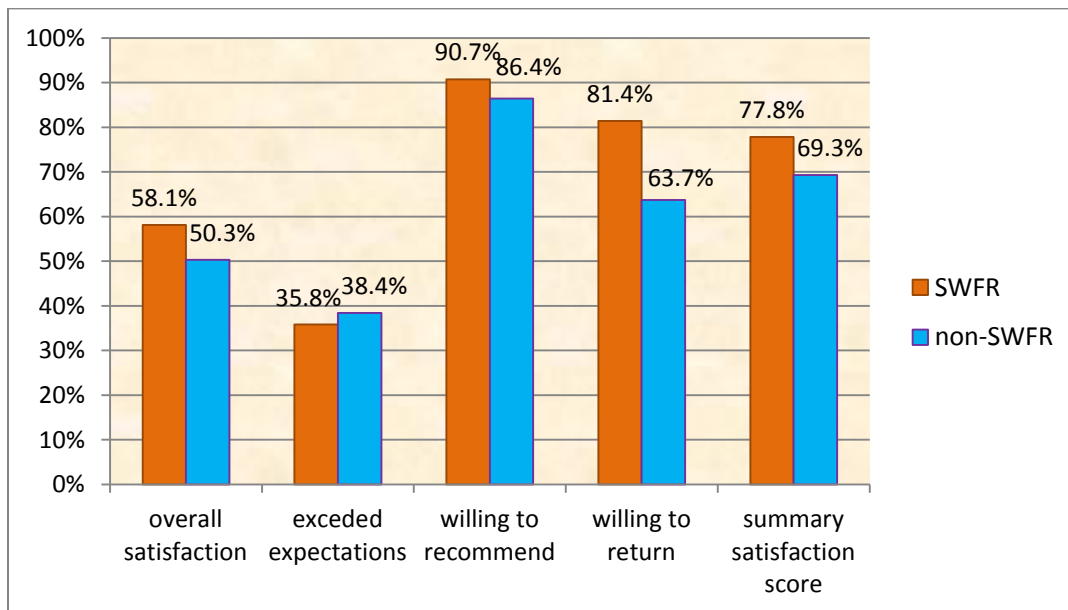
Their sightseeing participation rates were low because they were less likely to take a van tour (4% vs. 21%), go on a boat, submarine, or whale watching tour (11% vs. 24%), or hop on the trolley (5% vs. 20%).

For their entertainment they were less likely to go on a lunch or dinner cruise (20% vs. 34%), attend a luau (16% vs. 26%), or take in a Polynesian show (15% vs. 24%). Yet they were equally likely as non-SWFR visitors to visit museums, take hula lessons, or stop at arts or craft fairs.

### Satisfaction among Visitors Staying with Friends and Relatives

The figure below presents VSAT satisfaction ratings for visitors who stayed with friends or relatives and those who stayed at other accommodations. 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 30: Satisfaction Ratings for Visitors Staying with Friends and Relatives**



In general, visitors who stayed with friends and relatives had higher satisfaction scores than other visitors. The single exception was the expectation rating which was higher for visitors who did not stay with friends or relatives (38% vs. 36%)<sup>10</sup>. Overall satisfaction was eight points higher for the SWFR visitors. The percentage those were willing to return to Hawai'i in the next five years was 13 points higher for SWFR visitors.

Considering the differences in visitor activities and visitor satisfaction ratings, it may be useful to reference this group in future VSAT Annual Reports. Depending on the interests of HTA and the visitor industry, it may be useful to carry out some further research into this interesting visitor segment.

## 6. TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. Trip planning behaviors differed across the major market areas in 2012<sup>11</sup>. Visitors from Asian countries (Japan, China, and Korea) decide to take a vacation and conduct their trip planning in a relatively short time. Visitors from U.S. West, U.S. East, Canada, Europe, and Oceania tend to plan farther in advance (Table 1).

**Table 1: Timeline of Trip Planning Elements**

Trip planning elements	Began this planning activity...						during the trip
	before the trip						
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to take a vacation	15.2%	32.3%	28.6%	6.5%	17.3%	4.6	0.0%
Decided to visit Hawaii	15.2%	32.9%	28.4%	6.4%	17.1%	4.6	0.0%
Decided which island(s) to visit	17.3%	33.4%	28.0%	6.4%	15.0%	4.4	1.5%
Decided trip dates	18.6%	36.0%	27.8%	6.2%	11.4%	4.0	1.1%
Made accommodation reservations	22.9%	37.2%	25.6%	5.9%	8.3%	3.5	2.0%
Made airline reservations	23.5%	40.1%	27.0%	5.4%	3.9%	3.1	0.7%
Purchased airline tickets	25.2%	39.4%	26.5%	5.3%	3.6%	3.1	0.9%
Made rental car reservations	43.5%	33.0%	18.2%	3.5%	1.9%	2.3	10.4%
Made other trip decisions	56.0%	28.1%	8.6%	0.4%	6.9%	2.1	45.7%
Purchased tour or attraction tickets	66.0%	24.7%	7.3%	1.2%	0.8%	1.4	58.2%

Across all our visitors, trip planning begins about 4 to 4.5 months prior to the departure date. They decide to take a vacation, choose their destination a set trip dates at that time. Within the next

<sup>10</sup> Not statistically significant.

<sup>11</sup> Several trip planning questions were changed in VSAT making comparisons with previous years somewhat difficult. In this annual report, we present data for 2012 only. The companion volume contains data for the years 2007 through 2012 for all data that are comparable.

month they make airline and hotel reservations and pay for the tickets. During the next month, they make rental car reservations and tie down some additional trip details. During the last month before they leave, they may buy some tour or attraction tickets.

About ten percent of our visitors decide to rent a car after they arrive in Hawai'i. Nearly half of them (46%) make other trip decisions after arrival, and almost two thirds of them (63%) decide on tours and attractions after they get here.

The decision to take a vacation or trip is the earliest planning date recorded in the VSAT. Among all our visitors, about 15 percent begin planning a vacation less than a month ahead of time and about two percent start planning a year or more ahead of their departure date. Most of the planning takes place between a month and six months prior to departure.

Japanese visitors had the most distinct planning profile among the major MMAs. They had the largest number who started planning less than a month before departure and more than 44 percent of them made their first decisions one to three months ahead.

European visitors and those from Oceania had the longest planning lead times. A third of our visitors from Australia and New Zealand began planning four to six months ahead of their departure dates. Thirty percent started planning more than six months ahead of time.

## U.S. VISITORS

U.S. visitors start their vacation planning about a month earlier than average, but set their trip dates almost a month later than other visitors. In the end, they make their final reservations and ticket purchases a month later than average. U.S. visitors are also more likely to make decisions about tours and attractions after they arrive at their destination.

**Table 2: Trip Decision Making, U.S. Visitors, 2012**

Trip planning elements	Began this planning activity...						during the trip
	before the trip						
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to visit Hawaii	15.9%	29.6%	29.2%	6.3%	19.0%	5.4	0.0%
Decided to take a vacation	15.9%	29.9%	29.1%	6.4%	18.6%	5.4	0.0%
Decided which island(s) to visit	17.6%	30.2%	29.3%	6.3%	16.6%	5.3	1.3%
Decided trip dates	18.6%	33.2%	29.3%	6.3%	12.6%	3.0	0.8%
Made accommodation reservations	22.4%	34.7%	27.8%	5.5%	9.6%	2.8	2.3%
Made airline reservations	24.2%	37.6%	29.0%	5.3%	3.8%	2.6	0.6%
Purchased airline tickets	24.3%	38.2%	28.8%	5.1%	3.6%	2.6	0.8%
Made rental car reservations	42.1%	33.5%	19.1%	3.4%	1.9%	2.3	8.3%
Made other trip decisions	63.1%	19.9%	7.6%	0.3%	9.1%	0.8	48.6%
Purchased tour or attraction tickets	67.0%	23.5%	8.0%	1.0%	0.6%	0.8	62.8%

Percent of visitors with each response. One and only one choice is reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

- Visitors from the U.S. West and U.S. East MMAs did not exhibit significant differences in their trip planning.
- Four out of ten U.S. visitors made airline reservations and 38.2 percent purchased tickets one to three months before arriving in the islands. Close to as many visitors reserved accommodations (34.7%) one to three months before their trip.
- Three-quarters of U.S. visitors (75.6%) reserved a rental car less than three months prior to their arrival. Of those, 42.1 percent waited until less than one month before they traveled to reserve a rental car.
- The majority of U.S. visitors purchased tour and attraction packages (67.0%) and 63.1 percent made other trip decisions less than one month before arrival.

## JAPAN

Our visitors from Japan started trip planning later than any of our visitors and completed all of the transactions quickly. Once they make their plans, they tend to stick with them and are the least likely of all our visitors to make decisions after they arrive in Hawai'i.

**Table 3: Trip Decision Making, Japan Visitors, 2012**

Trip planning elements	Began this planning activity...						during the trip
	before the trip						
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to take a vacation	16.8%	44.6%	26.1%	3.8%	8.7%	2.6	0.0%
Decided to visit Hawaii	16.6%	46.5%	24.5%	4.3%	8.1%	2.6	0.0%
Decided which island(s) to visit	19.5%	47.7%	22.0%	4.1%	6.7%	2.5	1.7%
Decided trip dates	22.9%	48.0%	21.5%	3.5%	4.1%	2.4	2.4%
reservations	28.9%	47.0%	17.1%	3.6%	3.4%	2.3	0.7%
Made airline reservations	27.5%	50.2%	17.6%	2.6%	2.1%	2.3	0.6%
Purchased airline tickets	35.5%	45.3%	15.3%	2.5%	1.5%	2.2	0.9%
Made other trip decisions	44.1%	43.1%	9.6%	0.8%	2.4%	1.2	34.4%
Made rental car reservations	62.9%	27.1%	8.9%	0.8%	0.3%	0.8	17.1%
Purchased tour or attraction tickets	67.5%	26.9%	4.9%	0.4%	0.2%	0.7	36.8%

- Japanese visitors in 2012 continued to have a shortest planning and booking window among the visitors surveyed. Most of their travel decisions were made approximately two-and-a-half months before the vacation date.
- Less than three months before arrival, 61.4 percent decided to take a vacation, 63.1 percent decided to visit Hawai'i, 70.9 percent settled on the dates of travel, and 67.2 percent decided on the islands they wanted to visit.

- Also within three months of their trip, most Japanese visitors made airline reservations (77.7%), purchased airline tickets (80.8%), and made accommodation reservations (75.9%).
- Less than 30 days before arriving in Hawai'i, seven out of ten visitors from Japan (67.5%) purchased tour and attraction packages and 6 out of 10 made rental car reservations (62.9%).

## CANADA

Visitors from Canada and Europe have very similar trip planning behaviors. They start planning about five and a half months ahead of their trip, make reservations less than three months before they leave, and most of them make many of their activity decisions after arrival.

**Table 4: Trip Decision Making, Canada, 2012**

Trip planning elements	Began this planning activity...						during the trip
	before the trip						
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to take a vacation	11.6%	28.8%	28.3%	10.2%	21.2%	5.4	0.0%
Decided to visit Hawaii	11.8%	29.5%	27.4%	10.6%	20.7%	5.4	0.0%
Decided which island(s) to visit	13.2%	30.7%	28.9%	10.3%	16.9%	5.4	1.3%
Decided trip dates	14.4%	34.0%	28.8%	9.3%	13.5%	5.3	0.2%
reservations	18.6%	37.5%	24.3%	10.0%	9.6%	2.8	1.5%
Made airline reservations	17.9%	40.7%	27.6%	9.2%	4.6%	2.7	0.7%
Purchased airline tickets	18.2%	40.8%	27.5%	9.2%	4.3%	2.7	0.9%
Made rental car reservations	39.6%	34.0%	17.7%	6.1%	2.6%	2.4	11.9%
Made other trip decisions	65.9%	23.4%	1.3%	0.8%	8.6%	0.8	55.8%
Purchased tour or attraction tickets	66.8%	21.9%	8.0%	2.5%	0.8%	0.7	70.5%

- In 2012, Canadian visitors decided to take a vacation (68.7%), decided to visit Hawai'i, and decided on the islands they wanted to visit (72.8%) six months or less before arrival.
- One out of four Canadian visitors made airline reservations (40.7%), purchased airline tickets (40.8%), and made accommodation reservations (37.5%) one to three months before their trip.
- Some visitors made rental car reservations one to three months out (34%), while a slightly larger percentage (39.6%) waited until within 30 days of their arrival.
- The majority of visitors from Canada purchased tour and attraction packages during their trip (70.5%). Those who purchased prior to their trip did so within 30 days of departure (66.8%).

## EUROPE

**Table 5: Trip Decision Making, Europe Visitors, 2012**

Trip planning elements	Began this planning activity...						during the trip
	before the trip						
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to take a vacation	10.0%	24.7%	33.7%	11.4%	20.2%	5.5	0.0%
Decided to visit Hawaii	9.3%	27.3%	35.2%	11.1%	17.0%	5.4	0.0%
Decided which island(s) to visit	14.9%	27.7%	33.8%	9.2%	14.3%	5.3	3.6%
Decided trip dates	14.1%	30.2%	33.8%	10.5%	11.4%	5.3	2.0%
Made airline reservations	17.4%	34.2%	31.9%	10.1%	6.5%	2.9	2.1%
Purchased airline tickets	17.9%	34.1%	31.8%	10.1%	6.1%	2.8	2.6%
Made accommodation reservations	20.8%	34.4%	29.1%	9.1%	6.7%	2.7	6.7%
Made rental car reservations	39.9%	34.1%	19.1%	5.0%	2.0%	2.4	20.3%
Made other trip decisions	31.0%	57.1%	8.4%	0.0%	3.6%	2.3	65.0%
Purchased tour or attraction tickets	57.1%	17.9%	16.3%	3.1%	5.6%	0.8	74.3%

- The planning profile among European visitors in 2012 showed that they decided to take a vacation (31.6%), decided to visit Hawai'i (28.1%), and decided on the islands they wanted to visit (23.5%) more than six months prior to arrival.
- One out of three visitors made airline reservations (34.2%), purchased tickets (34.1%), and reserved accommodations (34.4%) one to three months before their trip.
- Some visitors made rental car reservations (34.1%) one to three months out, while others (39.9%) waited until less than one month before their trip.
- Three out of four visitors from Europe purchased tour and attraction packages during their trip (74.3%).

## OCEANIA

Like visitors from Canada and Europe, visitors from Oceania begin their trip planning about five and a half months before their departure date. However, they make airline reservations and purchase tickets at the same time. They delay making hotel reservations another two months.

**Table 6: Trip Decision Making, Oceania Visitors, 2012**

Trip planning elements	Began this planning activity...						
	before the trip						during the trip
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 months or more	Median (months)	
Decided to take a vacation	4.5%	24.1%	31.5%	11.7%	28.2%	5.5	0.0%
Decided to visit Hawaii	4.7%	25.2%	34.9%	10.3%	24.9%	5.4	0.0%
Decided which island(s) to visit	8.8%	29.6%	30.5%	9.9%	21.3%	5.4	3.4%
Decided trip dates	5.5%	32.3%	29.2%	10.0%	23.0%	5.4	1.7%
Made airline reservations	6.0%	38.2%	31.3%	12.0%	12.5%	5.2	2.8%
Purchased airline tickets	10.9%	34.3%	31.6%	12.6%	10.6%	5.2	1.1%
reservations	13.8%	33.4%	28.1%	14.1%	10.5%	2.8	3.1%
Made other trip decisions	9.9%	57.8%	31.2%	0.0%	1.1%	2.7	52.5%
Made rental car reservations	55.1%	25.4%	10.4%	5.1%	3.9%	2.3	46.5%
tickets	43.7%	33.3%	9.3%	7.1%	6.7%	1.0	68.7%

- Oceania visitors were similar to their U.S. and European counterparts in their longer planning and booking window. Approximately one third of these visitors decided to take a vacation (39.9%), to visit Hawai'i (35.2%), and which islands they wanted to visit (31.2%) more than six months prior to arrival.
- One out of three visitors made airline reservations (31.3%), purchased airline tickets (31.6%), and reserved accommodations (28.1%) four to six months before their trip.
- Visitors from Oceania were most likely among all Hawai'i visitors to wait until they were in the islands to make rental car reservations (46.5%).

## SOURCES OF INFORMATION USED TO PLAN TRIP

More than 40 percent of visitors use the following sources of information about Hawai'i prior to their trip: personal experience, recommendations from friends or relatives, online travel booking sites, information from airlines or commercial carriers, and online webpages or blogs covering Hawai'i (Table 7). During the trip, visitors tend to use personal experience, information provided by hotels and resorts, magazines, and books. Very few visitors seek information about Hawai'i after their trip (less than 3% overall).

**Table 7: When Accessed Sources of Information about Hawai'i – All Visitors, 2012**

	<b>Before the trip</b>	<b>During the trip</b>	<b>After the trip</b>
Personal experience	57.2%	27.0%	
Recommendations from friends or relatives	47.7%	18.6%	
Online travel booking site	44.5%	5.0%	1.0%
Information from airline/commercial carriers	40.8%	4.5%	
Online webpage or blog covering Hawai'i	40.4%	11.7%	2.9%
Information from hotels or resorts	39.8%	21.0%	
Travel Agents	35.0%	4.4%	
Books	33.9%	19.5%	2.9%
Magazines	24.5%	20.1%	2.6%
Hawai'i visitor bureaus website	22.4%	5.3%	1.1%
Companies specializing in packaged tours	19.6%	11.4%	
Smartphone or tablet applications relevant to your trip	12.6%	14.7%	1.8%
Online social networking site	8.2%	3.1%	1.1%
Newspapers	4.6%	8.0%	0.7%

With regard to the timing of their information access, U.S. West and U.S. East visitors had very similar profiles. Prior to and during the trip, personal experience, and recommendations from friends and relatives were the most frequently used sources. Online travel booking sites and information from airlines or commercial carriers or provided by hotels and resorts were also frequently used by U.S. visitors in planning for an upcoming trip and during the trip. Books and magazines were commonly used during the trip to obtain information about Hawai'i.



**Table 8: When Accessed Sources of Information about Hawai'i – U.S. West, 2012**

	<b>Before the trip</b>	<b>During the trip</b>	<b>After the trip</b>
Personal experience	65.4%	33.8%	
Recommendations from friends or relatives	48.0%	22.3%	
Books	25.3%	18.9%	1.5%
Information from hotels or resorts	40.9%	18.5%	
Magazines	12.5%	17.9%	1.2%
Smartphone or tablet applications relevant to your trip	12.6%	17.1%	1.6%
Online webpage or blog covering Hawai'i	33.0%	12.6%	1.1%
Newspapers	3.9%	9.6%	0.7%
Companies specializing in packaged tours	14.3%	8.7%	
Hawai'i visitor bureaus website	17.4%	5.7%	0.6%
Online travel booking site	44.7%	4.7%	0.6%
Information from airline/commercial carriers	43.7%	3.9%	
Online social networking site	7.8%	3.5%	0.8%
Travel Agents	17.3%	1.0%	

**Table 9: When Accessed Sources of Information about Hawai'i – U.S. East, 2012**

	<b>Before the trip</b>	<b>During the trip</b>	<b>After the trip</b>
Personal experience	58.0%	31.1%	
Recommendations from friends or relatives	53.9%	23.8%	
Information from hotels or resorts	45.5%	21.4%	
Books	30.7%	19.9%	1.7%
Smartphone or tablet applications relevant to your trip	13.5%	17.3%	1.5%
Magazines	14.5%	15.8%	1.0%
Companies specializing in packaged tours	22.3%	14.3%	
Online webpage or blog covering Hawai'i	41.4%	12.1%	2.0%
Newspapers	4.3%	7.4%	0.3%
Online travel booking site	43.4%	5.5%	0.7%
Hawai'i visitor bureaus website	26.7%	5.4%	0.5%
Travel Agents	28.0%	3.6%	
Information from airline/commercial carriers	44.6%	2.9%	
Online social networking site	8.3%	2.4%	1.0%

Canadian visitors relied most heavily on online travel booking sites when planning for their trip. In addition to personal experience and recommendations from others, Canadians also used online webpages and blogs about Hawai'i when planning their trip. While traveling, these visitors most often relied on their own experience, books, and magazines for information.

**Table 10: When Accessed Sources of Information about Hawai'i – Canada, 2012**

	<b>Before the trip</b>	<b>During the trip</b>	<b>After the trip</b>
Personal experience	62.5%	33.1%	
Books	41.9%	30.6%	4.5%
Magazines	22.3%	29.9%	2.0%
Information from hotels or resorts	50.7%	25.5%	
Companies specializing in packaged tours	19.7%	23.9%	
Recommendations from friends or relatives	61.8%	23.1%	
Online webpage or blog covering Hawai'i	53.8%	19.1%	3.7%
Smartphone or tablet applications relevant to your trip	17.1%	16.1%	1.4%
Newspapers	6.5%	15.4%	0.9%
Hawai'i visitor bureaus website	32.8%	11.5%	3.1%
Online travel booking site	62.8%	10.3%	1.4%
Online social networking site	12.6%	6.9%	2.0%
Information from airline/commercial carriers	51.3%	5.2%	
Travel Agents	34.9%	4.1%	

Japanese visitors were more likely than were U.S. visitors to rely on travel agents to provide information about Hawai'i prior to their trip. Magazines, books, and online webpages or blogs were used by most of these visitors to plan their trip.

During the trip, visitors from Japan typically used magazines, books, and hotels or resorts to access information about Hawai'i. Visitors from Japan were more likely than were U.S. visitors to seek additional information about Hawai'i after their trip, most often referring to magazines (7%), books (5.9%), and online webpages or blogs (6.8%).

**Table 11: When Accessed Sources of Information about Hawai'i – Japan, 2012**

	Before the trip	During the trip	After the trip
Magazines	56.2%	25.4%	7.0%
Information from hotels or resorts	24.8%	20.8%	
Books	50.7%	18.3%	5.9%
Travel Agents	64.8%	11.2%	
Personal experience	40.6%	9.1%	
Companies specializing in packaged tours	26.8%	8.4%	
Online webpage or blog covering Hawai'i	47.3%	7.6%	6.8%
Smartphone or tablet applications relevant to your trip	10.7%	7.1%	2.4%
Recommendations from friends or relatives	34.4%	6.4%	
Information from airline/commercial carriers	26.3%	5.6%	
Online travel booking site	38.0%	2.9%	1.7%
Newspapers	4.4%	2.9%	1.1%
Hawai'i visitor bureaus website	23.0%	1.9%	2.2%
Online social networking site	6.8%	1.8%	1.2%

Similar to Japanese, a high percentage of visitors from Europe also used travel agents (65%) as their primary source of information. Six out of ten European visitors planned their trip based on information obtained from books, online webpages, and travel booking sites, and hotels or resorts. Books, magazines, and information provided by hotels and resorts served as key information sources during their trips, as well. European visitors were most likely to seek information about Hawai'i after their trip, with 8.9 percent reading books about Hawai'i.

**Table 12: When Accessed Sources of Information about Hawai'i – Europe, 2012**

	Before the trip	During the trip	After the trip
Books	60.8%	39.5%	8.9%
Information from hotels or resorts	57.5%	29.7%	
Magazines	18.8%	29.3%	1.7%
Personal experience	46.2%	27.6%	
Recommendations from friends or relatives	52.5%	21.2%	
Smartphone or tablet applications relevant to your trip	18.8%	21.1%	1.9%
Online webpage or blog covering Hawai'i	58.5%	19.4%	3.8%
Newspapers	5.6%	18.4%	0.6%
Companies specializing in packaged tours	27.4%	15.2%	
Information from airline/commercial carriers	50.7%	13.6%	
Online travel booking site	58.4%	12.7%	1.3%
Hawai'i visitor bureaus website	36.1%	11.2%	1.4%
Travel Agents	62.5%	7.9%	
Online social networking site	15.7%	6.5%	2.3%

Oceania visitors were more likely (69.3%) than European visitors to use a travel agent when planning their trip. Recommendations from family and friends and information provided by hotels and resorts were important planning tools for more than half of these visitors. Information from hotels or resorts sources was also used during the trip by more than half of Oceania visitors. Oceania visitors also sought information about Hawai'i from companies specializing in packaged tours (20.5%) during their visit.

**Table 13: When Accessed Sources of Information about Hawai'i – Oceania, 2012**

	<b>Before the trip</b>	<b>During the trip</b>	<b>After the trip</b>
Information from hotels or resorts	51.0%	36.3%	
Companies specializing in packaged tours	18.3%	20.5%	
Magazines	18.0%	17.3%	1.1%
Personal experience	40.8%	14.9%	
Smartphone or tablet applications relevant to your trip	8.7%	11.0%	1.4%
Information from airline/commercial carriers	43.7%	9.3%	
Hawai'i visitor bureaus website	26.4%	9.1%	0.3%
Recommendations from friends or relatives	53.8%	9.0%	
Online webpage or blog covering Hawai'i	44.7%	8.8%	2.5%
Newspapers	10.9%	7.0%	0.1%
Online travel booking site	46.6%	6.7%	0.8%
Books	21.7%	6.6%	3.6%
Travel Agents	69.3%	5.9%	
Online social networking site	11.7%	4.4%	1.5%

## WAYS VISITORS USE SOURCES OF INFORMATION

Visitors to Hawai'i use a wide variety of resources to plan their trip. VSAT 2012 gathered information on 14 different uses for 14 information sources for visitors from six MMAs. In this section, we present a reduced set of information covering five important information sources, for all 14 information uses for those six MMAs. Additional information is published in the companion volume.

The Internet is the dominant source of trip planning information across all MMAs and types of information. Among all visitors, the Internet was the primary source for all types of information. Smartphone and tablet apps were frequently used to access maps and directions (20.1%), check the weather (22.1%), and locate restaurants (11.1%). Visitors relied on guidebooks primarily for maps (21%), planning activities (20.6%), and finding places to shop (23.2%) or eat (26.2%). Recommendations from friends and family were important to many visitors when selecting their travel destination (29%) and planning their activities (27.5%).

Visitors from Japan were unique from among all our visitors for their tendency to seek input from a travel agent. They used travel agents more often than Internet resources for certain aspects of their trip planning, such as selecting the destination (46.7%), choosing an airline (52.5%), estimating trip costs (49%), and when making airline (58.2%) and hotel reservations (55.4%).

**Table 14: How Sources of Information Were Used by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>Accessing maps and directions / GPS</b>							
Internet	29.7%	30.4%	33.9%	24.8%	32.8%	31.7%	29.1%
Guide Books	12.8%	14.7%	26.2%	43.0%	17.6%	12.5%	21.0%
Mobile Phone, Tablet Apps	26.9%	25.0%	12.1%	6.7%	11.3%	10.1%	20.1%
Friends,Family	7.0%	9.3%	8.3%	7.1%	5.5%	3.7%	7.4%
Travel Agent	1.7%	3.4%	3.8%	9.2%	2.6%	5.2%	4.1%
<b>Airport check-in</b>							
Internet	56.5%	54.5%	53.3%	22.1%	43.7%	31.6%	46.8%
Travel Agent	4.0%	8.0%	12.6%	33.4%	19.1%	27.4%	13.2%
Mobile Phone, Tablet Apps	7.7%	9.7%	3.8%	0.9%	5.6%	3.7%	6.1%
Friends,Family	2.8%	4.5%	3.6%	4.0%	3.5%	2.3%	3.5%
Guide Books	0.0%	0.1%	0.2%	4.3%	0.9%	0.1%	1.0%
<b>Checking the weather</b>							
Internet	43.5%	43.0%	54.9%	35.8%	58.1%	44.0%	42.5%
Mobile Phone, Tablet Apps	26.8%	28.9%	16.5%	8.8%	15.0%	20.1%	22.1%
Friends,Family	3.4%	4.6%	2.3%	2.0%	3.5%	0.8%	3.2%
Guide Books	1.0%	0.9%	2.3%	4.2%	3.1%	1.9%	1.8%
Travel Agent	0.7%	1.0%	2.1%	3.6%	1.5%	0.8%	1.5%
<b>Choosing an airline</b>							
Internet	60.9%	56.6%	60.7%	22.4%	39.7%	30.2%	49.6%
Travel Agent	11.0%	17.7%	22.2%	52.5%	47.8%	58.5%	25.0%
Friends,Family	10.4%	9.8%	8.1%	7.5%	4.2%	7.0%	9.3%
Mobile Phone, Tablet Apps	0.8%	0.6%	0.5%	0.4%	0.9%	0.0%	0.6%
Guide Books	0.2%	0.3%	0.6%	1.0%	0.6%	0.1%	0.4%
<b>Deciding on your vacation destination</b>							
Internet	34.4%	29.3%	44.5%	22.7%	41.5%	30.4%	31.1%
Friends,Family	30.3%	35.8%	34.9%	19.3%	26.9%	25.1%	29.0%
Travel Agent	6.7%	11.4%	14.3%	46.7%	29.6%	38.5%	18.9%
Guide Books	3.9%	6.9%	8.2%	11.7%	14.4%	5.9%	6.8%
Mobile Phone, Tablet Apps	1.2%	0.7%	1.1%	1.0%	1.3%	0.8%	1.0%
<b>Estimating the costs of your trip</b>							
Internet	38.1%	39.2%	47.1%	15.2%	38.7%	42.2%	33.7%
Travel Agent	6.2%	12.0%	9.5%	49.0%	29.5%	35.9%	19.0%
Friends,Family	8.5%	11.9%	9.5%	6.3%	6.8%	3.3%	8.6%
Guide Books	2.0%	3.0%	3.2%	1.8%	3.8%	2.9%	2.3%
Mobile Phone, Tablet Apps	1.0%	0.9%	0.8%	0.3%	1.5%	1.1%	0.8%
<b>Finding places to shop</b>							
Travel Agent	1.3%	3.7%	3.6%	7.1%	1.9%	3.7%	3.4%
Internet	22.3%	22.7%	29.1%	31.6%	28.4%	36.3%	25.5%
Friends,Family	20.3%	22.6%	20.3%	14.6%	16.3%	28.8%	19.8%
Guide Books	13.8%	16.1%	24.5%	47.9%	22.7%	20.7%	23.2%
Mobile Phone, Tablet Apps	9.6%	8.1%	3.9%	4.8%	6.2%	2.3%	7.5%

**Table 14: How Sources of Information Were Used by MMA, 2012 (continued)**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>Finding restaurants</b>							
Internet	33.7%	33.2%	35.5%	29.8%	35.8%	31.5%	32.7%
Friends,Family	32.0%	31.9%	27.3%	14.7%	21.5%	27.7%	27.4%
Guide Books	19.6%	21.9%	29.9%	42.0%	29.2%	26.0%	26.2%
Mobile Phone, Tablet Apps	14.8%	13.6%	5.7%	4.2%	6.6%	3.8%	11.1%
Travel Agent	2.4%	5.6%	3.5%	11.8%	5.5%	3.7%	5.4%
<b>Making airline reservations</b>							
Internet	65.1%	59.1%	61.4%	21.1%	40.7%	31.6%	51.8%
Travel Agent	12.0%	19.1%	23.8%	58.2%	46.9%	63.0%	27.3%
Friends,Family	7.4%	7.9%	5.6%	4.5%	1.9%	3.2%	6.5%
Mobile Phone, Tablet Apps	1.6%	1.4%	0.6%	0.2%	1.1%	0.1%	1.1%
Guide Books	0.0%	0.2%	0.2%	0.3%	0.7%		0.1%
<b>Making car rental reservations</b>							
Internet	52.2%	45.6%	52.2%	10.8%	35.2%	20.1%	39.8%
Travel Agent	10.7%	12.1%	13.0%	5.0%	16.9%	8.9%	9.9%
Friends,Family	7.1%	6.9%	6.7%	2.4%	5.4%	1.4%	5.7%
Mobile Phone, Tablet Apps	1.6%	1.1%	0.6%	0.1%	2.3%	0.7%	1.1%
Guide Books	0.8%	0.7%	0.7%	0.8%	0.8%	2.1%	0.8%
<b>Making hotel or other lodging reservations</b>							
Travel Agent	11.2%	17.6%	18.2%	55.4%	40.4%	52.8%	25.2%
Internet	48.4%	47.1%	58.1%	20.9%	42.9%	37.0%	41.8%
Friends,Family	15.4%	17.1%	14.7%	6.4%	7.2%	9.2%	13.3%
Guide Books	1.4%	2.4%	3.0%	1.7%	4.4%	1.3%	1.8%
Mobile Phone, Tablet Apps	1.4%	1.3%	0.8%	0.4%	2.9%	0.5%	1.1%
<b>Planning activities</b>							
Internet	40.8%	42.4%	46.1%	23.2%	45.8%	45.3%	37.7%
Friends,Family	31.2%	34.4%	29.1%	13.1%	22.2%	31.3%	27.5%
Guide Books	19.7%	22.4%	28.1%	19.7%	30.9%	12.1%	20.6%
Travel Agent	4.3%	9.2%	6.2%	25.5%	14.7%	21.8%	11.2%
Mobile Phone, Tablet Apps	5.1%	5.2%	3.9%	1.7%	3.6%	1.1%	4.1%
<b>Purchasing any tour or attraction packages</b>							
Internet	21.1%	27.0%	27.7%	18.7%	25.8%	25.7%	22.5%
Travel Agent	7.0%	13.7%	11.5%	35.0%	18.9%	29.6%	16.2%
Guide Books	7.5%	8.1%	12.9%	8.7%	8.8%	9.6%	8.3%
Friends,Family	6.7%	11.6%	8.4%	6.1%	8.4%	5.9%	7.7%
Mobile Phone, Tablet Apps	2.8%	2.6%	1.4%	0.6%	1.5%	1.9%	2.1%
<b>Other trip planning</b>							
Internet	0.9%	1.1%	1.0%	1.5%	1.5%	0.4%	1.1%
Friends,Family	0.6%	0.4%	0.4%	0.9%	0.1%	0.1%	0.6%
Travel Agent	0.3%	0.1%	0.5%	1.5%	0.8%	0.3%	0.5%
Guide Books	0.0%	0.2%	0.1%	1.0%	1.7%		0.3%
Mobile Phone, Tablet Apps	0.1%	0.1%	0.1%	0.2%	0.1%	0.0%	0.1%

## 7. SAFETY ISSUES & NUISANCES

The safety of Hawai'i's visitors is vitally important to the State and industry partners. Therefore, the 2012 survey asked visitors if they experienced any adversity or safety issues during their stay. The majority of visitors to Hawai'i (56%) did not encounter any nuisances or safety issues during their stay in the islands.

Several response options were introduced in the 2012 survey to allow for a more detailed understanding of the issues encountered by visitors to the State. The response option "seeing homeless persons" was among those.

The top issue identified by visitors from all regions was seeing homeless persons. Visitors from Europe (48.3%) and the U.S. East (47.4%) were most likely to report seeing homeless persons as an issue. Visitors from U.S. West were least likely to mention it (37%).

**Table 15: Safety Issues and Other Nuisances by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
Seeing homeless	36.9%	47.4%	44.4%	46.3%	48.3%	47.2%	42.3%
Severe weather/natural calamities/windy	9.5%	12.1%	14.6%	5.2%	8.8%	4.5%	9.3%
Service problems	3.2%	2.8%	5.5%	8.2%	6.0%	4.3%	4.4%
Received parking or other auto violations	2.0%	3.8%	1.2%	3.4%	2.7%	0.1%	2.6%
Solicited by drug dealers	2.7%	2.5%	3.6%	1.5%	6.6%	3.7%	2.5%
Verbal harassment	2.9%	2.5%	2.1%	1.2%	2.7%	4.6%	2.4%
Car was vandalized/robbed	1.6%	1.1%	1.0%	0.6%	0.2%	0.0%	1.2%
Wallet/purse/valuables stolen	0.7%	1.8%	1.6%	1.3%	0.7%	1.2%	1.2%
Solicited by prostitutes	0.7%	1.9%	1.7%	0.8%	1.1%	1.1%	1.1%
Physical violence/harm/harassment	0.3%	0.5%	0.4%	0.2%	0.2%	0.1%	0.3%
Room was vandalized/robbed	0.1%	0.2%	0.5%	0.3%	0.1%	0.1%	0.2%
Other negative	10.4%	8.6%	11.8%	6.2%	8.7%	6.3%	9.0%
No negatives	59.2%	54.9%	61.6%	46.7%	67.3%	63.9%	56.1%

- Compared to visitors from other markets, Japanese visitors reported more issues with the level of service they received during their trip (8.2%).
- With the addition of "Windy" to the severe weather or natural calamities response option, a larger percentage of visitors noted that the weather was a problem in 2012 than in 2011 (9.3% vs. 5.8%).
- A higher percentage of U.S. East (3.8%) respondents received parking tickets compared to other visitor groups. The percentage of U.S. East visitors who reported receiving a parking ticket doubled from 2011 to 2012.
- Visitors from Europe were most likely to report that they had no negative experiences while they were here (67%), but they were more than twice as likely as other groups to report that they had been solicited by drug dealers (6.6% vs. 2.5%).

- Visitors from Oceania were also quite likely to report that they had no negative experiences to report (64%), but were they most likely group to have reported being verbally harassed during their trip to Hawai'i (4.6%).

## 8. VISITOR PROFILES

To assist users of this report, we include here a brief description of the characteristics of visitors to Hawai'i in 2012.

### LIFESTYLE/LIFESTAGE SEGMENTS AND VISITATION STATUS

The lifestyle/lifestage of our visitors was developed by the Hawai'i Visitor and Conventions Bureau in the last decade. It uses information from several sources within VSAT and other surveys to classify each VSAT respondent as one of the five lifestyles and lifestages shown in the table below.

**Table 16: Lifestyle/Lifestage Segments and Visitation Status by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>LIFESTYLE/LIFESTAGE</b>							
Wedding / Honeymoon	1.7%	5.0%	3.0%	11.5%	13.8%	4.2%	4.8%
Family	23.9%	16.8%	26.7%	17.8%	7.5%	25.8%	21.0%
Young	17.7%	28.1%	21.9%	25.8%	30.4%	31.6%	22.8%
Middle Age	31.3%	29.4%	26.2%	27.5%	25.4%	22.9%	29.3%
Seniors	25.4%	20.7%	22.2%	17.3%	22.9%	15.6%	22.0%
<b>VISITATION STATUS</b>							
First time	18.5%	41.8%	35.6%	41.9%	70.8%	56.1%	32.2%
Repeat	81.5%	58.2%	64.4%	58.1%	29.2%	43.9%	67.8%

Total may not sum to 100% due to rounding.

### U.S. West and U.S. East

- As was found in 2011, Middle Age represented the largest segment among both U.S. West (31.3%) and U.S. East (29.4%) respondents in 2012. Seniors (25.4%) accounted for the second largest segment of U.S. West respondents, while Young (28.1%) was more common among visitors from U.S. East.
- The majority of U.S. visitors were Repeat Visitors, with 81.5 percent of U.S. West and 58.2 percent of U.S. East visitors having traveled to Hawai'i.

### Japan

- In 2012, more than half of Japanese respondents were in the Young (25.8%) and Middle Age (27.5%) segments.
- The Wedding/Honeymoon segment accounted for 11.5 percent of visitors from Japan.
- A similar percentage of visitors were in the Family (17.8%) and Senior (17.3%) lifestages.
- Three out of five visitors from Japan (58.1%) were Repeat Visitors.



## Canada

- Visitors from Canada were most evenly distributed across the various lifestyle/lifestage segments in 2012. Family (26.7%) and Middle Age (26.2%) accounted for a slightly larger percentage of visitors than Young (21.9%) and seniors (22.2%).
- In 2012, there were approximately twice as many Repeat Visitors (64.4%) as First-time Visitors (35.6%).

## Europe

- Approximately 30 percent of European respondents were Young (30.4%) and one-quarter were Middle Age (25.4%). Seniors accounted for 22.9 percent of European visitors.
- The largest percentage of Wedding/Honeymoon visitors (13.8%) was found among visitors from Europe.
- The majority of European respondents (70.8%) were first-timer visitors.

## Oceania

- Respondents from Oceania were most often in the Young (31.6%) or Family (25.8%) segments.
- Seniors only accounted for 15.6 percent of Oceania visitors.
- More than half of Oceania respondents (56.1%) were first-timer visitors.

## EMPLOYMENT, INCOME & EDUCATION

**Table 17: Employment, Income, and Education by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>EMPLOYMENT</b>							
Working	73.6%	74.4%	75.9%	42.4%	81.2%	83.6%	70.5%
Retired	22.8%	21.8%	21.6%	31.6%	15.9%	13.4%	23.1%
Homemaker	3.6%	3.8%	2.6%	26.0%	2.9%	3.0%	6.4%
<b>INCOME</b>							
Under \$50K	11.8%	11.9%	10.6%	29.0%	27.3%	17.3%	15.8%
\$50K-\$69,999	13.4%	11.8%	10.3%	19.9%	15.3%	9.1%	14.1%
\$70K-\$99,999	19.6%	17.1%	23.5%	26.8%	21.3%	12.3%	20.6%
\$100K-\$199,999	35.0%	37.9%	39.3%	23.5%	27.1%	47.1%	33.8%
\$200K+	20.2%	21.3%	16.3%	0.8%	9.0%	14.3%	15.7%
<b>EDUCATION</b>							
High school or less	5.7%	9.7%	12.6%	28.9%	19.8%	25.1%	12.8%
Post high school	27.7%	23.0%	32.0%	27.3%	26.7%	32.6%	27.0%
College graduate	37.6%	32.7%	30.8%	38.8%	22.9%	27.1%	35.6%
Post graduate degree	29.0%	34.6%	24.6%	5.1%	30.6%	15.1%	24.7%

Totals may not sum to 100% due to rounding.

### U.S. West

- Close to three-quarters of U.S. West respondents (73.6%) were working in 2012. Approximately 23 percent of U.S. West visitors were retirees.
- Fifty-five percent of U.S. West respondents reported annual household incomes of more than \$100,000.
- Sixty-six percent of U.S. West visitors had some college or college degrees.

### U.S. East

- Much like the U.S. West visitors, the majority of U.S. East respondents in 2012 were working (74.4%) or retired (21.8%).
- In 2012, 59.2 percent of U.S. East respondents reported having annual household incomes of \$100,000 or more.
- An approximately equal number of respondents had either a college degree (32.7%) or a post-graduate degree (34.6%). An additional 23 percent reported some college education.

### Japan

- In 2012, 42.4 percent of respondents from Japan were working, which was down from 58.9 percent in 2011. Similar to previous years, there were significantly more homemakers (26%) compared to the U.S. West, U.S. East, Canadian, European and Oceania markets.
- Among Japanese respondents who visited Hawai'i, 24.3 percent reported annual household incomes of 15 million yen or more.

- Visitors from Japan in 2012 were more likely than visitors from any other MMA to have obtained a college degree (38.8%). The percentage of respondents with post-graduate degrees, however, was significantly lower (5.1%) than for any other market.

## Canada

- The employment, income, and education profile for Canadian respondents in 2012 was very similar to that of U.S. visitors. Approximately three-quarters were working (75.9%) and 21.6 percent were retirees.
- Four out of ten Canadian respondents reported income levels between \$100,000 and \$199,999 (39.3%), while 16.3 percent reported annual household income of \$200,000 or more.
- One of three of the respondents had some college education and 30.8 percent had earned a college degree. One-quarter of the Canadian visitors had postgraduate degrees (24.6%).

## Europe

- The majority of European respondents 2012 were working (81.2%), while 15.9 percent were retired. The remainder of the respondents were homemakers (2.9%).
- More than one-quarter earned less than \$50,000 per year. An additional 36.6 percent earned between \$50,000 and \$99,999 per year. Only 9 percent of these respondents had an annual household income of \$200,000 or more.
- Three out of ten European respondents had a post-graduate degree, and another 22.9 percent had earned a college degree.

## Oceania

- Respondents from Oceania were most likely among all the MMAs to be working (83.6%). Among those who were not employed, 13.4 percent were retired and three percent were homemakers.
- The majority of respondents from Oceania in 2011 were working (72.4%) while 20.9 percent were retired. Homemaker and/or students comprised 4.6 percent of the respondents.
- The majority of Oceania respondents had annual household incomes between \$100,000 and \$199,999 (47.1%). Another 14.3 percent earned over \$200,000 annually and 17.3 percent reported less than \$50,000 in income annually.
- One-third of Oceania respondents in 2012 had some college education (32.6%) and 27.1 percent were college graduates. Approximately 15 percent of these respondents (15.1%) had a post-graduate degree.

## OTHER VISITOR CHARACTERISTICS

Visitors were also asked about their traveling companions, travel history, if they had ever been a resident of Hawai'i, had friends or relatives living in the State, and whether they own property in Hawai'i. Across all visitor segments, the majority of Hawai'i visitors have traveled within the past three years (81.8%) and were taking their current trip with their spouses. About one-quarter of visitors have friends or relatives living in Hawai'i (26.3%), but very few had ever been Hawai'i residents themselves (4.4%).

### U.S. West

- There were more females (51.5%) than males (48.5%) among visitors from the U.S. West in 2012. The median age was 42 years old, down from a median of 54 years in 2011.
- Most of the U.S. West respondents (86.3%) had traveled on vacation more than 500 miles from home in the past three years. The average number of trips made by members of this segment was 5.9 during that same period.
- Similar to 2011, more than half had visited California (50.6%), 40.5 percent visited Las Vegas, and 32.2 percent had been to Europe in the last three years. One in four U.S. West visitors who had traveled recently had been to Mexico (25.5%).
- More than half of these respondents had friends or relatives in Hawai'i (52.2%; +3 percentage points from 2011) and 12.3 percent were previous Hawai'i residents (+2.7 percentage points from 2011). They were the most likely visitor segment to own property in Hawai'i (13.6%).
- Consistent with previous years, 2012 U.S. West respondents traveled to the islands with their spouses (68.2%), with other adult family members (30.3%), and with children (26.3%). Additionally, 20.2 percent of U.S. West visitors came with friends/business associates.
- While on O'ahu, U.S. West visitors in 2012 stayed primarily in hotels (55.1%), as opposed to other types of accommodation. While on Kaua'i, a higher proportion of U.S. West visitors stayed in timeshare properties (31.9%). A similar proportion of U.S. West visitors stayed in hotels (30.3%) and in condominium units (33.2%) while on Maui. While visiting the Big Island, these visitors chose to stay in hotels in Kona and at the homes of family or friends.

### U.S. East

- Just over half of the U.S. East visitors who responded to the 2012 survey were female (51.8%). Down from 53 the previous year, the median age for this visitor segment in 2012 was 42 years.
- The majority of the U. S. East respondents had taken a long distance trip of more than 500 miles from their homes in the past three years (82.8%; +5 percentage points from 2011). They have made 5.7 trips, on average, during that time.
- Notable percentages of U.S. East visitors in 2012 had traveled to Florida (51.2%), California (43%), Las Vegas (33.4%), Europe (33.8%), and/or the Caribbean (32.7%) in the past three years.
- Fewer U.S. East as U.S. West visitors previously lived in Hawai'i (6.9%), have friends and relatives who live in Hawai'i (36%) or own property in Hawai'i (8.5%).
- Similar to 2010, U.S. East respondents in 2012 also came to Hawai'i with their spouses (73.2%) and with other adult family members (30.4%). A higher percentage came with friends/business associates (19.4%) compared to children (21.0%).

**Table 18: Visitor Characteristics by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
Gender							
Male	48.5%	48.2%	47.3%	48.4%	48.0%	48.1%	48.1%
Female	51.5%	51.8%	52.7%	51.6%	52.0%	51.9%	51.9%
Age							
18-24 yrs	3.2%	3.5%	3.0%	3.8%	5.5%	4.0%	3.5%
25-34 yrs	13.6%	14.1%	13.7%	20.1%	27.0%	13.9%	15.6%
35-44 yrs	17.2%	17.3%	17.2%	18.9%	22.3%	17.3%	17.8%
45-54 yrs	24.0%	23.0%	26.8%	17.3%	19.2%	26.2%	22.2%
55-64 yrs	25.4%	25.4%	25.8%	26.2%	15.2%	24.2%	25.4%
65+ yrs	16.6%	16.8%	13.5%	13.6%	10.6%	14.4%	15.5%
Traveled 500+ miles in past 3 years							
Yes	86.3%	82.8%	90.1%	67.7%	86.9%	84.6%	81.8%
No	13.7%	17.2%	9.9%	32.3%	13.1%	15.4%	18.2%
Lived in Hawaii							
yes	12.3%	6.9%	2.0%	1.5%	2.3%	1.4%	4.4%
no	87.7%	93.1%	98.0%	98.5%	97.7%	98.6%	95.6%
Friends/Relatives in Hawaii							
yes	52.1%	36.0%	18.2%	17.9%	18.9%	12.1%	26.3%
no	47.9%	64.0%	81.8%	82.1%	81.1%	87.9%	73.7%
Own Property in Hawaii							
Yes, I own timeshare units	7.5%	6.1%	5.4%	11.0%	0.5%	1.4%	6.2%
Yes, I own other types of property	6.1%	2.4%	2.4%	0.7%	0.8%	0.6%	2.2%
No, but I plan to in the future	11.9%	8.4%	9.3%	12.0%	4.6%	2.9%	9.2%
No	74.5%	83.1%	82.9%	76.3%	94.1%	95.1%	82.4%
Traveled to Hawaii with...							
My spouse	68.2%	73.2%	79.1%	68.8%	61.7%	73.3%	71.1%
My kids	26.3%	21.0%	32.9%	20.2%	15.4%	27.3%	23.7%
My adult family members	30.3%	30.4%	38.6%	31.8%	18.7%	27.5%	30.6%
My friends/associates	20.2%	19.4%	26.3%	19.0%	23.9%	25.2%	21.7%
My girl/boy friend	9.3%	7.0%	8.9%	2.7%	23.9%	9.2%	8.7%
Same sex partner	2.3%	2.7%	1.8%	0.2%	3.7%	2.2%	1.9%

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

**Table 19: Competitive Destinations by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
Traveled to...							
Alaska	16.3%	10.8%	10.0%	0.5%	4.5%	8.5%	7.9%
Australia	6.3%	4.5%	8.8%	6.3%	18.5%	56.5%	12.1%
Bali	1.5%	0.8%	2.0%	5.9%	8.1%	18.1%	4.8%
California	50.6%	43.0%	41.7%	5.5%	52.0%	48.8%	36.3%
Canada	22.8%	18.9%	55.8%	3.5%	21.7%	24.4%	24.2%
Caribbean	16.8%	32.7%	32.3%	0.6%	21.5%	7.3%	18.6%
Central America	7.0%	7.4%	9.4%	0.7%	10.0%	5.0%	6.0%
China	6.0%	4.1%	8.5%	16.9%	10.6%	11.9%	10.3%
Europe	32.2%	33.8%	42.7%	20.8%	81.5%	39.2%	39.2%
Fiji	1.8%	0.9%	1.6%	0.5%	2.2%	17.5%	2.4%
Florida	23.3%	51.2%	31.5%	1.9%	30.3%	15.1%	25.4%
Guam/Saipan	0.6%	0.3%	0.3%	15.0%	0.3%	0.9%	4.5%
Japan	5.2%	3.3%	4.4%	51.2%	8.0%	8.3%	18.7%
Korea	1.5%	1.1%	1.9%	27.0%	2.7%	2.3%	9.0%
Las Vegas	40.5%	33.4%	40.3%	4.5%	39.2%	41.3%	30.0%
Mexico	25.5%	21.1%	36.9%	1.1%	12.1%	8.0%	17.7%
New York City	24.1%	30.9%	22.6%	4.6%	41.4%	35.0%	23.2%
New Zealand	4.3%	2.4%	4.4%	1.8%	10.2%	36.0%	6.5%
None	5.4%	5.5%	3.5%	9.2%	3.4%	4.0%	5.8%
Other	15.2%	14.6%	17.6%	12.9%	26.4%	15.0%	16.2%
Other Asia	5.4%	4.3%	7.6%	15.0%	19.4%	20.3%	11.2%
Other US States	59.5%	60.0%	53.2%	13.1%	42.1%	41.5%	43.6%
South America	6.4%	6.7%	8.2%	1.0%	12.9%	5.5%	6.0%
Thailand	4.0%	2.3%	5.0%	7.8%	18.4%	20.5%	8.0%

**Table 20: Accommodations by MMA, 2012**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>Accommodation- Oahu</b>							
Hotel	55.1%	66.7%	62.1%	77.6%	75.8%	87.4%	73.1%
Condo	7.3%	3.9%	11.3%	10.4%	4.8%	4.3%	7.8%
Bed & Breakfast	0.5%	0.7%	0.3%	0.1%	2.8%	0.3%	0.6%
Timeshare	7.1%	5.6%	6.7%	8.8%	1.2%	1.1%	6.0%
Friends' or Family's Home	19.7%	12.3%	5.2%	1.8%	6.0%	1.7%	5.8%
Home I Own	0.3%	0.3%	0.6%	0.3%	0.4%		0.3%
Cruise Ship	0.9%	2.7%	3.2%	0.2%	1.3%	1.2%	1.3%
Vacation Rental Property	6.9%	5.3%	7.8%	0.5%	3.8%	3.0%	3.4%
Other	2.3%	2.4%	2.8%	0.3%	3.9%	0.9%	1.7%
<b>Accommodation- Maui</b>							
Hotel	30.3%	42.2%	21.8%	65.9%	55.3%	57.0%	41.1%
Condo	33.2%	17.7%	41.0%	17.4%	17.1%	15.9%	25.2%
Bed & Breakfast	1.5%	1.8%	1.1%	0.8%	6.7%	1.9%	3.0%
Timeshare	14.1%	12.3%	8.5%	3.8%	2.0%	3.2%	7.9%
Friends' or Family's Home	6.7%	4.2%	2.6%	2.3%	5.0%	2.6%	4.3%
Home I Own	1.2%	0.4%	0.8%		0.1%	0.3%	0.5%
Cruise Ship	1.5%	12.9%	8.9%	8.3%	3.0%	13.3%	7.1%
Vacation Rental Property	9.4%	7.4%	13.2%	1.5%	7.1%	4.2%	8.6%
Other	2.2%	1.1%	2.1%		3.6%	1.6%	2.2%
<b>Accommodation- Molokai</b>							
Hotel	12.9%	24.6%	11.1%		22.9%	16.7%	18.1%
Condo	29.4%	20.4%	29.2%	66.7%	16.7%	5.6%	24.4%
Bed & Breakfast	2.4%	6.7%	2.8%		10.4%		4.6%
Timeshare	4.8%	3.3%	5.6%		2.1%		4.0%
Friends' or Family's Home	19.0%	12.1%	2.8%		8.3%		13.0%
Home I Own	4.8%	4.6%	2.8%				4.0%
Cruise Ship	0.8%	10.0%	13.9%	33.3%	16.7%	72.2%	9.2%
Vacation Rental Property	22.2%	15.0%	27.8%		14.6%	5.6%	18.9%
Other	3.6%	3.3%	4.2%		8.3%		3.8%
<b>Accommodation- Lanai</b>							
Hotel	74.4%	74.6%	56.5%	42.9%	44.7%	21.1%	67.7%
Condo	2.4%	0.9%	1.4%		2.6%		1.5%
Bed & Breakfast	1.8%	1.3%	2.9%	14.3%		5.3%	1.9%
Timeshare		1.3%		14.3%	2.6%		0.9%
Friends' or Family's Home	12.2%	3.9%	2.9%		2.6%		6.0%
Home I Own	0.6%	0.9%					0.6%
Cruise Ship	1.2%	13.4%	30.4%	28.6%	34.2%	73.7%	15.7%
Vacation Rental Property	4.3%	1.3%	1.4%		2.6%		2.3%
Other	3.0%	2.6%	4.3%		10.5%		3.4%

**Table 20: Accommodations by MMA, 2012 (continued)**

	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
<b>Accommodation- Hilo</b>							
Hotel	19.6%	24.9%	22.7%	61.9%	41.9%	27.2%	29.1%
Condo	3.1%	1.5%	4.0%	3.1%	4.9%	2.9%	3.2%
Bed & Breakfast	7.7%	10.0%	12.8%	4.1%	22.8%	12.6%	12.8%
Timeshare	3.1%	2.5%	2.7%	7.2%	0.6%	1.0%	2.4%
Friends' or Family's Home	33.6%	15.6%	6.2%	6.2%	3.4%	5.8%	13.9%
Home I Own	2.9%	0.3%	0.5%	3.1%	0.6%	1.0%	1.1%
Cruise Ship	2.6%	23.4%	25.7%	11.3%	8.7%	42.7%	16.5%
Vacation Rental Property	18.8%	13.7%	16.5%		6.8%	1.9%	12.5%
Other	8.6%	8.0%	8.9%	3.1%	10.4%	4.9%	8.4%
<b>Accommodation- Kona</b>							
Hotel	36.3%	43.2%	26.1%	63.7%	59.9%	51.1%	43.0%
Condo	18.6%	11.7%	21.2%	12.6%	9.0%	7.5%	14.8%
Bed & Breakfast	2.5%	2.2%	2.4%	0.5%	10.0%	4.3%	3.6%
Timeshare	12.6%	12.3%	13.2%	14.8%	1.2%	3.8%	10.5%
Friends' or Family's Home	10.5%	5.0%	3.6%	2.1%	3.5%	2.2%	4.7%
Home I Own	1.4%	1.1%	1.7%	0.7%	0.3%		1.1%
Cruise Ship	2.2%	15.5%	9.0%	2.4%	5.5%	23.7%	8.9%
Vacation Rental Property	13.5%	7.6%	19.1%	1.4%	6.1%	6.5%	10.7%
Other	2.3%	1.5%	3.6%	1.7%	4.6%	1.1%	2.8%
<b>Accommodation- Kauai</b>							
Hotel	19.7%	33.7%	17.1%	46.0%	57.4%	26.8%	30.9%
Condo	21.0%	11.9%	24.4%	15.9%	10.7%	16.3%	17.1%
Bed & Breakfast	0.4%	1.1%	0.9%	3.2%	6.7%	2.0%	2.0%
Timeshare	31.9%	23.4%	23.7%	11.1%	3.3%	9.2%	20.2%
Friends' or Family's Home	5.7%	3.2%	3.0%	3.2%	2.1%	3.3%	3.3%
Home I Own	1.5%	0.2%	0.6%		0.3%		0.5%
Cruise Ship	2.8%	13.9%	9.6%	17.5%	6.7%	28.8%	10.5%
Vacation Rental Property	14.2%	11.0%	18.4%	1.6%	7.7%	11.8%	12.9%
Other	2.8%	1.6%	2.3%	1.6%	4.9%	2.0%	2.6%

## Japan

- More females than males responded to the survey in 2012 (51.6% and 48.4%, respectively). The median age for Japanese respondents was 42 years, seven years younger than in 2011.
- Compared to visitors from other MMAs, Japanese visitors were less likely to have taken a long distance trip of more than 500 miles from their homes in the past three years (67.7%). Those who had traveled during the past several years took an average of 8.8 trips and traveled most often to Korea (27%), Europe (20.8%), China (16.9%), and either Guam or Saipan (15%).
- Very few Japanese respondents lived in Hawai'i previously (1.5%), but 17.9 percent have friends and/or relatives living in Hawai'i in 2012. A notable percentage own property in Hawai'i (11.7%).



- A higher percentage of Japanese respondents (11%) owned timeshare properties in Hawai'i compared to respondents from all other MMAs.
- Consistent with previous years, two out of three (68.8%) of Japanese visitors surveyed in 2012 came with their spouses, while 31.8 percent came to Hawai'i with adult members of their families. Approximately 20 percent traveled with their children (20.2%) or with friends/associates (19%).
- In 2012, hotels were the lodging of choice for Japanese visitors on O'ahu (77.6%), Maui (65.9%), and the Island of Hawai'i (62.8%). While on Kaua'i, 46 percent chose to stay in a hotel while 17.5 percent stayed on a cruise ship and 15.9 percent elected to stay in a condominium.

## Canada

- As was found for the other MMAs, there were more female respondents (52.7%) than male respondents among Canadian visitors surveyed in 2012. The median age among Canadians was 42 years, a decade younger than the median age in 2011.
- Nine out of ten respondents (90.1%) had taken a long distance trip of more than 500 miles from their homes in the past three years. The most common destinations included Europe (42.7%), California (41.7%), Las Vegas (40.3%), and other parts of Canada (55.8%).
- Only two percent had lived in Hawai'i before, but 18.2 percent have friends and/or relatives who live in the islands and 7.8 percent own timeshare units (5.4%) or other types of property (2.4%) in Hawai'i.
- Visitors from Canada were most likely among all visitor segments to be in Hawai'i with their spouses (79.1%). They also frequently made the trip with other adult family members (38.6%) and/or their children (32.9%).
- Most Canadians chose to stay in a hotel (62.1%) on O'ahu, but condominium units were the most popular choice (41%) during their time on Maui. On Kaua'i, an approximately equal number of Canadians opted for condominiums (24.4%) as stayed in timeshares (23.7%).

## Europe

- Fifty-two percent of our 2012 visitors from European were female. The median age among this visitor segment was 42 years.
- Most visitors from Europe (86.9%) had taken a long distance trip of more than 500 miles from their homes in the past three years, making an average of 7.1 trips during that time. Similar to 2011, many of these respondents had traveled to California (52%) and around Europe (81.5%) in the past three years.
- The percentage of 2012 respondents who made a recent trip to New York City increased to 41.4 percent, up from 28.5 percent in 2009 and 37.6 percent in 2011.
- Only 2.3 percent of Europeans lived in Hawai'i in the past and less than one percent own timeshare units or other types of property in the islands. Almost 19 percent reported having friends and/or relatives living in Hawai'i.
- European visitors were most often traveling with their spouses (61.7%), boyfriend or girlfriend, with friends or associates (23.9% apiece), or with other adult family members (18.7%).
- European visitors preferred to stay in hotels, regardless of which island they visited.

## Oceania

- Among the survey respondents from Oceania, 48.1 percent were male, 51.9 percent were female, and their median age was 41 years.
- Nearly 85 percent of these respondents had taken a long distance trip of more than 500 miles from their homes in the past three years. On average, those who traveled made five such trips in recent years.
- More than half of 2012 respondents had traveled around Australia (56.5%; +13.4 percentage points over 2011). Other popular destinations for Oceania visitors included California (48.8%), Las Vegas (41.3%), and Europe (39.2%).
- Oceania respondents were least likely among all visitors to have lived in Hawai'i before (1.4%) and to own timeshare units (1.4%) or other types of property (0.6%) in the islands. They were also least likely to have friends and/or relatives who reside in the State (12.1%).
- Three out of four Oceania visitors surveyed traveled with their spouses (73.3%). Oceania respondents often traveled with other adult family members (27.5%), their children (27.3%), and with friends or business associates (25.2%).
- The majority of Oceania respondents stayed in hotels while they were on O'ahu (87.4%), Maui (57%), Kaua'i (57.4%), or in Kona (51.1%). While visiting Hilo, however, 42.7 percent elected to stay on a cruise ship.

## PRIMARY PURPOSE OF TRIP

For seven out of ten visitors to Hawai'i, vacation was the primary purpose of their trip. Visiting friends and relatives and honeymooning were the next most frequently cited reasons for visiting the islands at 5.4 and 5.1 percent, respectively. Figure 32 shows the distribution of trip purposes other than vacation for all 2012 visitors to Hawai'i.

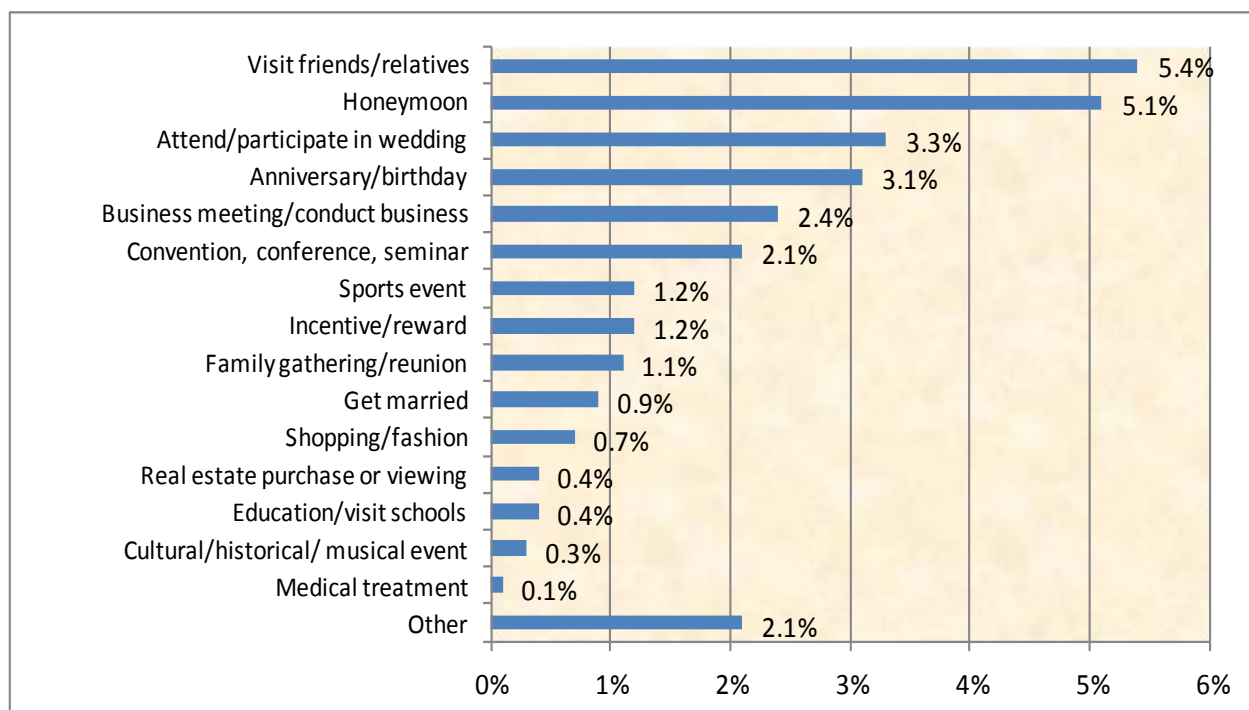
## U.S.

- In 2012, the majority of U.S. West (65.3%) and U.S. East (61.9%) visitors surveyed listed vacation as the primary reason for coming to the islands.
- Ten percent of U.S. visitors traveled to Hawai'i to visit friends and relatives.
- Celebrating a birthday or anniversary (5.1%) and business-related reasons (4.8%) were reported by approximately five percent of respondents each.

## Japan

- Vacation was the primary reason for 67 percent of Japanese respondents to visit Hawai'i, up from 63 percent in 2011.
- Similar to 2010 and 2011, Japanese respondents also listed honeymoon (8.7%) and attend/participate in a wedding (6.5%) among their primary reasons for visiting.

**Figure 31: Primary Purpose of Trip Excluding Vacation, All Visitors, 2012**



**Table 21: Purpose by MMA, 2012**

Purpose of Trip	Major Market Areas						All MMAs
	US-West	US-East	Canada	Japan	Europe	Oceania	
Other	3.3%	2.4%	1.3%	2.0%	1.8%	2.2%	2.1%
Medical treatment	0.2%	0.0%	0.0%	0.1%			0.1%
Cultural/historical/ musical event	0.4%	0.2%	0.1%	0.7%	0.2%	0.2%	0.3%
Education/visit schools	0.3%	0.5%	0.2%	0.5%	0.6%	0.2%	0.4%
Real estate purchase or viewing	1.0%	0.6%	0.1%	0.3%	0.1%	0.2%	0.4%
Shopping/fashion	0.1%	0.1%	0.3%	1.9%	0.2%	1.0%	0.7%
Get married	0.4%	0.7%	0.3%	2.0%	1.2%	0.5%	0.9%
Family gathering/Reunion	1.6%	1.2%	1.3%	0.9%	0.8%	0.7%	1.1%
Incentive/reward	0.6%	1.8%	0.5%	1.2%	2.9%	0.4%	1.2%
Sports event	0.9%	0.6%	1.0%	2.2%	1.0%	1.3%	1.2%
Convention, conference, seminar	2.1%	3.2%	1.9%	0.7%	3.2%	1.5%	2.1%
Business meeting/conduct business	4.6%	5.0%	1.0%	1.2%	1.3%	0.4%	2.4%
Anniversary/birthday	4.1%	5.8%	3.1%	1.5%	2.5%	0.9%	3.1%
Attend/participate in wedding	3.0%	2.3%	2.8%	6.5%	1.4%	1.2%	3.3%
Honeymoon	1.5%	4.4%	2.2%	8.7%	8.7%	4.0%	5.1%
Visit friends/relatives	10.8%	9.3%	2.8%	2.0%	5.3%	3.2%	5.4%
Vacation	65.3%	61.9%	81.1%	67.6%	68.8%	82.0%	70.1%

## Canada

- Four out of five of Canadian respondents (81.1%) indicated that vacation was their primary reason for coming to the islands in 2012.
- Other reasons reported by visitors from Canada were to celebrate an anniversary or birthday (3.1%), to visit friends/relatives (2.8%), to attend/participate in a wedding (2.8%), and for their honeymoon (2.2%).

## Europe

- Vacation was the primary reason provided by 68.8 percent of European respondents to visit Hawai'i in 2012, similar to 67.7 percent who responded in 2011.
- In addition, European respondents listed honeymoon (8.7%), visiting friends and relatives (5.3%), attending a convention, conference or seminar (3.2%), and incentive/reward (2.9%) as primary reasons for visiting.

## Oceania

- In 2012, a slightly lower percentage of respondents from Oceania listed vacation (86.8%) as the primary reason for visiting Hawai'i (82.0%) compared to those who responded in 2011 (86.8%).
- In addition, Oceania respondents listed honeymoon (4.0 %) and visiting friends and relatives (3.2%) as primary reasons for visiting.

## 9. SURVEY METHODOLOGY

The Visitor Satisfaction and Activities 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 2012 survey has 6 pages and 26 questions, down from 8 pages and 33 questions in 2011. 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 2012, English and Japanese speaking respondents were also given the option of filling out the VSAT questionnaire online.

**Table 22: Response Rates and Sample Statistics, VSAT 2012**

MMA	Arrivals		Mailed		Returned		Sample Fraction	Response Rate	Sample Error
	number	Pct.	number	Pct.	number	Pct.			
U.S. West	3,035,644	43.8%	10,854	17.9%	2,658	15.5%	0.09%	24.5%	1.90
U.S. East	1,544,303	22.3%	12,272	20.2%	3,291	19.2%	0.21%	26.8%	1.71
Canada	499,144	7.2%	12,384	20.4%	3,582	20.9%	0.72%	28.9%	1.63
Japan	1,465,654	21.2%	12,005	19.8%	4,087	23.8%	0.28%	34.0%	1.53
Europe	107,111	1.5%	8,648	14.3%	2,286	13.3%	2.13%	26.4%	2.03
Oceania	271,294	3.9%	4,514	7.4%	1,261	7.3%	0.46%	27.9%	2.75
Total	6,923,150	100%	60,677	100%	17,165	100%	0.25%	28.3%	0.75

The overall survey response rate for 2012 was 28.3 percent. That produced a sample error estimate of plus-or-minus 0.75 percentage points at the 95 percent confidence level. Response rates for individual MMAs ranged from a low of 24.5 percent ( $\pm 1.9$  percentage points) to a high of 34 percent ( $\pm 1.5$  percentage points) for our Japanese visitors.

Survey forms returned by mail were scanned, verified, and transferred to digital files for analysis. Data collected from the online surveys were downloaded and merged in with the database containing statistics scanned from the mailed VSAT surveys. Processing of returned forms was done on a weekly basis.

The data were weighted and adjusted to accommodate the disproportionate sample design and to bring the sample into correspondences with the parameters of the population from which they were selected. Specifically, the weighting system included MMA, arrivals month, visitor status (first-time vs. repeat), and island visited (O'ahu vs. Neighbor island).

## 10. SURVEY FORMS

## ENGLISH LANGUAGE VSAT SURVEY FORM, 2012



# Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815  
Website: [www.hawaiitourismauthority.org](http://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/survey](http://www.hawaiitourismauthority.org/survey)**

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](mailto: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

## 2012 VISITOR SATISFACTION SURVEY

If you have internet access and a PC, we ask that you fill out this survey on the web at:  
**[www.hawaiiitourismauthority.org/survey](http://www.hawaiiitourismauthority.org/survey)**  
 Your password is the 6 digit number on the label in the bottom right corner of this page.

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

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

MARKING INSTRUCTIONS	
<b>CORRECT MARKS:</b> ● ● ● ● ●	<b>INCORRECT MARKS:</b> ⊗ ⊘ ⊖ ⊙ ○

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

Excellent		Above Average	Below Average				Poor
<b>8</b>	<b>7</b>	<b>6</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<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 Hawai'i ... ?**

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

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

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

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

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

**4b. Why would you be unlikely to revisit Hawai'i? (Mark all that apply)**

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

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

	Q5a. Primary Purpose (one answer)	Q5b. Secondary Purpose(s)
Vacation	<input type="radio"/>	<input type="radio"/>
Attend a business meeting or conduct business	<input type="radio"/>	<input type="radio"/>
Attend a convention, conference or seminar	<input type="radio"/>	<input type="radio"/>
Incentive / reward	<input type="radio"/>	<input type="radio"/>
Visit friends or relatives	<input type="radio"/>	<input type="radio"/>
Get married	<input type="radio"/>	<input type="radio"/>
Attend / participate in a wedding	<input type="radio"/>	<input type="radio"/>
Honeymoon	<input type="radio"/>	<input type="radio"/>
Anniversary / birthday	<input type="radio"/>	<input type="radio"/>
Attend / participate in a cultural / historical / musical event	<input type="radio"/>	<input type="radio"/>
Attend / participate in a sporting event	<input type="radio"/>	<input type="radio"/>
Medical treatment	<input type="radio"/>	<input type="radio"/>
Shopping / fashion	<input type="radio"/>	<input type="radio"/>
Education / visit schools	<input type="radio"/>	<input type="radio"/>
Family Gathering / Reunion	<input type="radio"/>	<input type="radio"/>
Real estate purchase or viewing	<input type="radio"/>	<input type="radio"/>
Other (specify) _____	<input type="radio"/>	<input type="radio"/>

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

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

7. On this trip, who was in your travel party?  
*[Mark all that apply]*

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

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

	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
<b>Sightseeing</b>							
On own (self-guided) / Driving around island	0	0	0	0	0	0	0
Helicopter ride or airplane tour	0	0	0	0	0	0	0
Boat Tour/submarine ride/whale watching	0	0	0	0	0	0	0
Visiting communities - i.e. Chinatown, Haleiwa	0	0	0	0	0	0	0
Private limousine/van tour/tour bus	0	0	0	0	0	0	0
Scenic views / natural landmarks	0	0	0	0	0	0	0
Movie and television filming location tours	0	0	0	0	0	0	0
<b>Recreation</b>							
Beach/sunbathing/swimming in the ocean	0	0	0	0	0	0	0
Surfing/bodyboarding/paddleboarding	0	0	0	0	0	0	0
Canoeing/kayaking	0	0	0	0	0	0	0
Snorkeling/scuba diving	0	0	0	0	0	0	0
Jet skiing/parasailing/windsurfing	0	0	0	0	0	0	0
Golf	0	0	0	0	0	0	0
Running/jogging/fitness walking	0	0	0	0	0	0	0
Spa	0	0	0	0	0	0	0
Backpacking/hiking/camping	0	0	0	0	0	0	0
Agritourism – i.e. farms, ranches	0	0	0	0	0	0	0
Sports event or tournament	0	0	0	0	0	0	0
State parks / botanical gardens	0	0	0	0	0	0	0
<b>Entertainment and Dining</b>							
Lunch/sunset/dinner/evening cruise	0	0	0	0	0	0	0
Live music / stage show	0	0	0	0	0	0	0
Nightclub/dancing/bar/karaoke	0	0	0	0	0	0	0
Fine dining	0	0	0	0	0	0	0
Family restaurant	0	0	0	0	0	0	0
Fast Food	0	0	0	0	0	0	0
Café/coffee house	0	0	0	0	0	0	0
Ethnic dining	0	0	0	0	0	0	0
Prepared own meals	0	0	0	0	0	0	0
<b>Shopping</b>							
Malls / department stores	0	0	0	0	0	0	0
Designer boutiques	0	0	0	0	0	0	0
Hotel stores	0	0	0	0	0	0	0
Swap meet or flea market	0	0	0	0	0	0	0
Discount/outlet stores	0	0	0	0	0	0	0
Supermarkets	0	0	0	0	0	0	0
Farmer's market	0	0	0	0	0	0	0
Convenience stores	0	0	0	0	0	0	0
Duty free stores	0	0	0	0	0	0	0
Local shops and artisans	0	0	0	0	0	0	0
<b>History, Culture, and Fine Arts</b>							
Historic military site	0	0	0	0	0	0	0
Other historic site	0	0	0	0	0	0	0
Museum/art gallery	0	0	0	0	0	0	0
Luau	0	0	0	0	0	0	0
Polynesian show/hula show	0	0	0	0	0	0	0
Lessons such as hula or canoeing	0	0	0	0	0	0	0
Ukulele lessons	0	0	0	0	0	0	0
Play/concert/theatre	0	0	0	0	0	0	0
Art/craft fair	0	0	0	0	0	0	0
Festival (specify)	0	0	0	0	0	0	0
<b>Business</b>							
Meeting(s)	0	0	0	0	0	0	0
Convention / Conference	0	0	0	0	0	0	0

10. Regarding your most recent trip, how would you rate your experience on 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 mark both.*

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

	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"/>		
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"/>
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"/> Korea                 |                                       |
| <input type="radio"/> Mexico                |                                       |
| <input type="radio"/> New Zealand           |                                       |
| <input type="radio"/> Thailand              |                                       |
| <input type="radio"/> Europe                |                                       |
| <input type="radio"/> Central America       |                                       |
| <input type="radio"/> South America         |                                       |
| <input type="radio"/> Other Asia            |                                       |
| <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

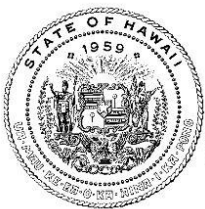
19. Do you have friends and/or relatives who live in Hawai'i?

- 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

## JAPANESE LANGUAGE VSAT SURVEY FORM, 2012



# Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815  
Website: [www.hawaii tourism authority.org](http://www.hawaii tourism authority.org)

NEIL ABERCROMBIE  
Governor

MIKE MCCARTNEY  
President and  
Chief Executive Officer

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

アロハ!

今回のあなた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。

今回のハワイ滞在中、このハワイ観光局による来訪者意見調査に十分お答え頂けるかと存じます。あなたのお名前は100万以上のフォームからこの来訪者意見調査のためにランダムに選ばれました。

私たちは、ハワイに来られる訪問者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。私たちのそんな心遣い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、来訪者全員のハワイでの経験を向上させるために役立てられるもので、大変重要です。

**あなたから頂いた情報については当方で厳重に管理し意見調査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集計され、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、郵便料支払い済み封筒に入れ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参加頂く事をお勧め致します。

**[www.hawaii tourism authority.org/survey](http://www.hawaii tourism authority.org/survey)**

インターネットでこのアンケートにご参加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桁の数字になります。

この意見調査に関するご質問は、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](mailto:Info@SMShawaii.com) までお問い合わせ下さい。ハワイ諸島への訪問と貴重なお時間に感謝致します。

Sincerely,

Mike McCartney  
President and Chief Executive Officer



## 2012 年来訪者意見調査

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参加下さい

[www.hawaii tourism authority.org/survey](http://www.hawaii tourism authority.org/survey)

あなたのパスワードはこのページ内 右下のラベル上の 6 桁の数字になります。

アロハ! 最近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。ハワイ諸島を訪問する方への対応を評価することができるように、貴重なご意見を是非お聞かせ下さるようお願い申し上げます。お答え頂いたアンケートは、来訪者全員のハワイでの経験を向上させるために役立てられるもので、大変重要です。なお、あなたから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集計され、総合意見として反映させていただきます。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、郵便料支払い済み封筒に入れ、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. あなたは、最近のハワイ旅行を全体的にどのよう  
に評価なさいますか?

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. 今回のハワイ旅行をどう思われますか?

- 期待以上だった
- 期待通りだった
- 期待以下だった

3. あなたは、休暇を過ごす場所としてハワイを  
お友達や親戚にどの程度すすめられますか?

- 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. あなたは、今後 5 年間にまたハワイを訪れると  
思われますか?

- 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. またハワイを訪れる可能性が低い理由は何で  
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/物価が高すぎる
- サービスが悪い
- 不親切な地元住民/歓迎されないと感じた
- 健康上の理由/年齢の制限
- 次の旅行まで 5 年間は短すぎる
- その他 (具体的に) \_\_\_\_\_

- 5a. 最近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	<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. 今回休暇を目的でハワイに来られていた場合、今回のハワイ旅行は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
  - 特別な行事
  - その他の旅行よりも特別
  - 年に1回又は2回の定期的な旅行のひとつ
  - 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. 一泊以上したそれぞれの島ではどのような宿泊施設に滞在なさいましたか？

	コンド		タイム シェア	友人や 親戚の家	自己所有 の家	バケーション		
	ホテル	ミニアム B&B				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. 今回訪れたそれぞれの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
<b>観光</b>							
個人(自分で観光した) / 島内をドライブ	0	0	0	0	0	0	0
ヘリコプター/ 飛行機ツアー	0	0	0	0	0	0	0
ボートツアー/ 潜水艦 / ホエールウォッチング	0	0	0	0	0	0	0
地域訪問 - チャイナタウン、ハレイワなど	0	0	0	0	0	0	0
リムジン/バンツアー/ 観光バスツアー	0	0	0	0	0	0	0
展望台/ 眺望スポット	0	0	0	0	0	0	0
映画、テレビのロケ地ツアー	0	0	0	0	0	0	0
<b>レクリエーション</b>							
ビーチ/ 日光浴 / 海水浴	0	0	0	0	0	0	0
サーフィン/ ボディボード / パドルボード	0	0	0	0	0	0	0
カヌー/ カヤック	0	0	0	0	0	0	0
スノーケル/ スキューパーダイビング	0	0	0	0	0	0	0
ジェットスキー/パラセーリング/ウィンドサーフィン	0	0	0	0	0	0	0
ゴルフ	0	0	0	0	0	0	0
ランニング/ ジョギング/ ウォーキング	0	0	0	0	0	0	0
スパ	0	0	0	0	0	0	0
バックパッキング/ ハイキング/ キャンプ	0	0	0	0	0	0	0
農業体験 - 農園、牧場など	0	0	0	0	0	0	0
スポーツ行事/ トーナメント	0	0	0	0	0	0	0
州立公園 / 植物園	0	0	0	0	0	0	0
<b>エンターテインメントとダイニング</b>							
ランチ/サンセット/ディナー/イブニングクルーズ	0	0	0	0	0	0	0
生演奏/ ステージショー	0	0	0	0	0	0	0
ナイトクラブ/ダンス/バー/カラオケ	0	0	0	0	0	0	0
高級料理店	0	0	0	0	0	0	0
ファミリーレストラン	0	0	0	0	0	0	0
ファーストフード	0	0	0	0	0	0	0
カフェ/ コーヒーハウス	0	0	0	0	0	0	0
エスニック料理	0	0	0	0	0	0	0
自分で調理する	0	0	0	0	0	0	0
<b>ショッピング</b>							
モール / デパート	0	0	0	0	0	0	0
有名ブランドブティック	0	0	0	0	0	0	0
ホテル内のショップ	0	0	0	0	0	0	0
スワップミート/ フリーマーケット	0	0	0	0	0	0	0
ディスカウント/ アウトレットストア	0	0	0	0	0	0	0
スーパー	0	0	0	0	0	0	0
ファーマーズマーケット (朝市)	0	0	0	0	0	0	0
コンビニエンスストア	0	0	0	0	0	0	0
免税店	0	0	0	0	0	0	0
ローカルショップと地元の職人	0	0	0	0	0	0	0
<b>歴史、文化、美術</b>							
戦争史跡	0	0	0	0	0	0	0
その他の史跡	0	0	0	0	0	0	0
美術館/ アートギャラリー	0	0	0	0	0	0	0
ルアウ	0	0	0	0	0	0	0
ポリネシアンショー/ フラショー	0	0	0	0	0	0	0
レッスン-フラやカヌーなど	0	0	0	0	0	0	0
ウクレレレッスン	0	0	0	0	0	0	0
演劇/ コンサート/ シアター	0	0	0	0	0	0	0
アート/ クラフトフェア	0	0	0	0	0	0	0
お祭り (具体的に)	0	0	0	0	0	0	0
<b>仕事</b>							
会合	0	0	0	0	0	0	0
集会 / 会議	0	0	0	0	0	0	0

10. 今回訪れた各島での体験について、あなたはどのように評価なさいますか？

	大変		あまり良く		訪問しな かった
	良かった	良かった	なかった	悪かった	
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"/>
マウイ島	<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"/>
ラナイ島	<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"/>
ハワイ島（コナ）	<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"/>

今回のハワイ旅行について、あなたはいつそれぞれについて決定しましたか？

- 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、何日前からそれぞれについて決定したか数字をご記入ください。

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

12. (A) 旅行前 (B) 旅行中 (C) 旅行後にそれぞれ以下のどれを使用してハワイの情報を得ましたか？  
 (該当するものを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	<input type="radio"/>	<input type="radio"/>	-
パッケージツアー専門の会社	<input type="radio"/>	<input type="radio"/>	-
航空会社が提供する情報	<input type="radio"/>	<input type="radio"/>	-
ホテル/ リゾートが提供する情報	<input type="radio"/>	<input type="radio"/>	-
個人の旅行経験	<input type="radio"/>	<input type="radio"/>	-
友人/ 親戚のアドバイス	<input type="radio"/>	<input type="radio"/>	-
インターネットの旅行予約サイト	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ハワイについてのブログ、ホームページ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ソーシャルネットワーキングサイト	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ハワイ州観光局ホームページ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
雑誌	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
新聞	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
本	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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、どういった風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"/>
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"/>
天気のチェック	<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. 今回のハワイ旅行を除いて、過去3年間に飛行機を利用した500マイル以上の泊りがけ観光旅行をなさいましたか？

はい (何回?) →

いいえ

15. 過去3年間に下記のどの旅行先を訪問なさいましたか？ (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
- 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. その際どの島を訪問なさいましたか？ (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. 今回訪れたそれぞれの島で下記のどれ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
<b>交通</b>							
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2011年度総年収(税込)は次のどれに当てはまりますか？

- 300万円未満
- 300万円以上、400万円未満
- 400万円以上、500万円未満
- 500万円以上、600万円未満
- 600万円以上、700万円未満
- 700万円以上、800万円未満
- 800万円以上、900万円未満
- 900万円以上、1,000万円未満
- 1,000万円以上、1,200万円未満
- 1,200万円以上、1,400万円未満
- 1,400万円以上、1,600万円未満
- 1,600万円以上、2,000万円未満
- 2,000万円以上

24. あなたの職業は？

- 自営業
- 就業者
- 定年退職者
- 学生
- 主婦
- その他

25. ハワイ訪問者の安全と快適さは、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つけて下さい)

- 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

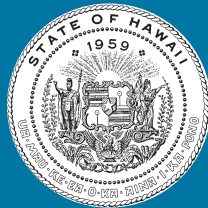
26. このハワイ旅行ではあなたと同行者全員の出費も含めていくらお使いになりましたか？買物、食事、宿泊、飛行機、その他の出費も全て含めて下さい。(米ドル表記、コンマなし)

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。

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、同添の郵便料支払い済み封筒に入れ、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

AUTHORITY

1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815

[hawaii tourism authority.org](http://hawaii tourism authority.org)