

Hawai'i Tourism Authority Marketing Effectiveness Study – External

Wave 2: Jun – Dec 2018



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Marketing Effectiveness Study Objectives

- Hawai'i welcomed nearly 10 million visitors in 2018.
- With almost \$18 billion spent by visitors in-destination and over 200,000 jobs supported, the travel industry is a vital component of Hawai'i's economy, accounting for \$2 billion in tax revenues for the state
- The Hawai'i Tourism Authority seeks to measure:
 - The impact of its Global Marketing Contractor's Integrated Marketing Campaigns and their effect on awareness of Hawai'i as a destination, including brand perceptions and intent to visit among major market areas
 - How Hawai'i ranks among its competitive set
 - Target audience behaviors, attitudes, and motivators towards travel



North America Travel Characteristics

US West & US East

- **Reasons for Vacationing:** Both US West (USW) and US East (USE) residents are more likely to take a vacation to spend quality time with their spouse/family, for rest and relaxation, and to explore and do new things.
- **Previous Hawai'i Visits:** More than one-third of USW residents (36%) have visited Hawai'i in the past three years, more than any other competitor destination. Hawai'i ranks fourth as most visited destination for USE residents (15%), falling far behind major competitors like Florida (54%) and the Caribbean (30%).
- **Future Hawai'i Visits:** Among destinations USW residents are interested in visiting in the next two years, Hawai'i scores nearly double that of the second highest destination – Italy (49% vs 28%). For USE residents, 28 percent say they are considering Hawai'i in the next two years, ranking third among the competitive set.
- **Future Island Visits:** For those planning to visit Hawai'i in the next year, more than half of US residents (55%) plan to go to Maui, while 36 percent are planning to visit O'ahu, 35 percent plan to go to Island of Hawai'i, and 31 percent intend to go Kaua'i.
- **Never Been's:** USE residents are much more likely to have never visited Hawai'i before (45%), while 22 percent have visited just once. More than half of USW residents have visited more than twice. Only 24 percent of USW residents have never visited Hawai'i.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches are among the top reasons why both USW and USE residents continue to vacation in Hawai'i. Nearly half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, USE residents are more likely to use hotels compared to USW residents (73% vs 55%).

Canada

- **Reasons for Vacationing:** Canadians see vacations as a time to rest and relax, spend quality time with their spouse/family, explore/do new things, and to experience other cultures.
- **Previous Hawai'i Visits:** Just 15 percent of Canadian residents have visited Hawai'i in the past three years, falling seventh in the competitive ranking. Around one third of Canadians have visited Europe, the Caribbean, or Florida in the past three years.
- **Future Hawai'i Visits:** Among destinations Canadians are interested in visiting in the next two years, Hawai'i falls in third at 82 percent, below Europe (48%) and the Caribbean (39%). At the same time, just 15 percent of Canadian residents plan to visit Hawai'i in the next year, again ranking fifth among the competitive set.
- **Future Island Visits:** For those who are planning to visit, 49 percent plan to go to Maui, while 43 percent plan to go to O'ahu and 29 percent intend to visit the Island of Hawai'i.
- **Never Been's:** Nearly half of Canadian residents (49%) have never visited Hawai'i before, while 25 percent have visited once and 28 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches are among the top reasons why Canadians continue to vacation in Hawai'i. Nearly half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, more than 50 percent plan to stay in a hotel, followed distantly by condo (17%), cruise ship (14%), and rental house (14%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the cost of vacation package and airfare rank among the top reasons not to visit, followed by an unfavorable exchange rate. One in ten cited US attitudes toward foreigners as a reason not to visit.

Japan and Korea Travel Characteristics

Japan

- **Reasons for Vacationing:** Japan residents see vacations as a time to rest and relax, indulge their passion for food and cuisine, to feel alive and energetic, and to experience other cultures.
- **Previous Hawai'i Visits:** More than one third of Japanese residents (36%) have visited Hawai'i in the past three years, ranking at the top of the competitive set and on par with Europe.
- **Future Hawai'i Visits:** Among destinations Japanese are interested in visiting in the next two years, Hawai'i falls in second place at 49 percent, below Europe (51%) and nearly equal with Australia (48%). Over one quarter (26%) plan to visit Hawai'i in the next year, equivalent to Europe (27%).
- **Future Island Visits:** For those who are planning to visit, 68 percent plan to go to O'ahu, while 49 percent intend to visit the Island of Hawai'i and 42 percent plan to go to Maui.
- **Never Been's:** One quarter of Japanese residents (27%) have never visited Hawai'i before, while 26 percent have visited once and 47 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, great weather, beaches, and safety are among the top reasons why the Japanese continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 89 percent plan to stay in a hotel, followed distantly by condos (15%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the price of airfare/hotel, been before and wishing to try another destination, and being too congested are among the top travel barriers.

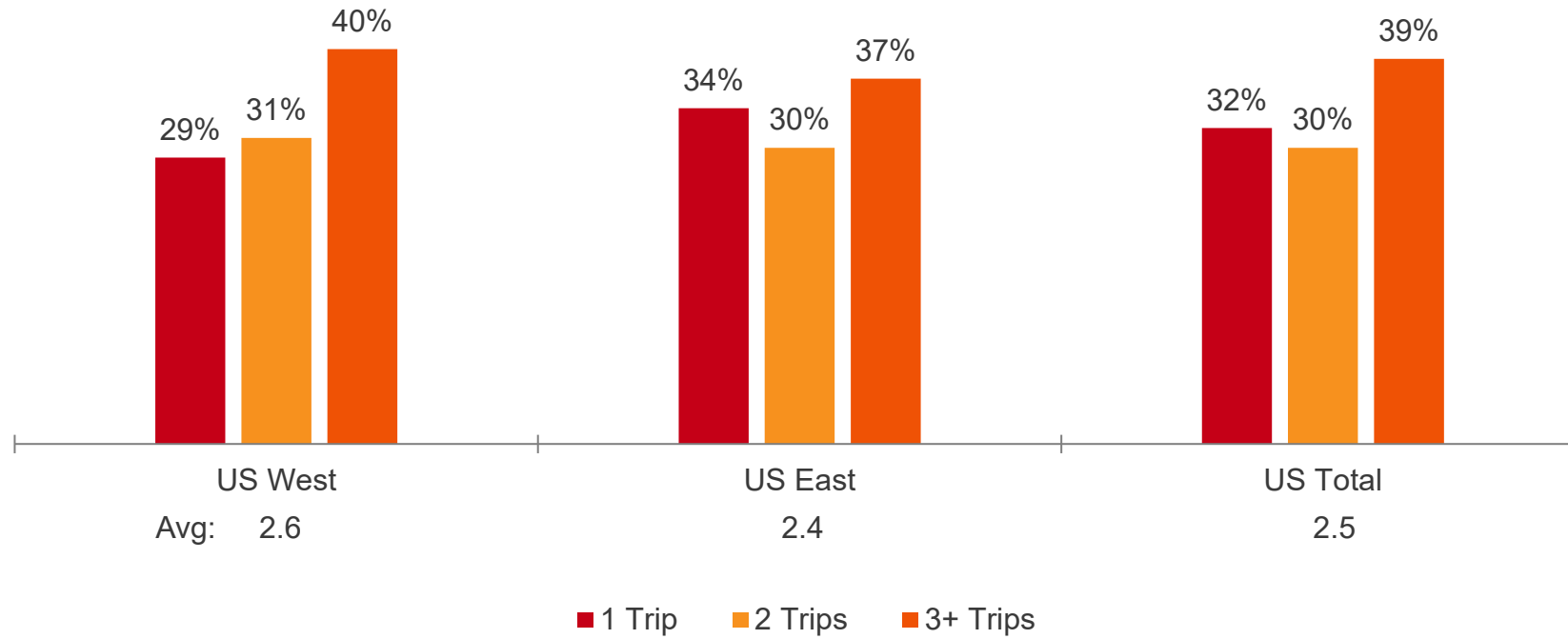
Korea

- **Reasons for Vacationing:** Korean residents see vacations as a chance to spend quality time with their spouse/family, a time to relax, to experience other cultures, and to feel alive and energetic.
- **Previous Hawai'i Visits:** Over one in ten Korean residents (14%) have visited Hawai'i in the past three years, ranking close to the bottom of the competitive set.
- **Future Hawai'i Visits:** Among destinations Koreans are interested in visiting in the next two years, Hawai'i ranks third at 37 percent, following Europe (46%) and Southeast Asia (43%). Nearly one fifth (18%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 56 percent plan to go to the Island of Hawai'i, while 41 percent intend to visit Maui, and 36 percent plan to go to O'ahu.
- **Never Beens:** Two thirds of Korean residents (64%) have never visited Hawai'i before, while 22 percent have visited once.
- **Reasons for Returning:** Great beaches, stunning natural beauty, great weather, and safety are among the top reasons why Koreans continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 87 percent plan to stay in a hotel, followed distantly by condos (34%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the price of airfare, the flight being too long, and not having enough time to travel to Hawai'i are among the top travel barriers.

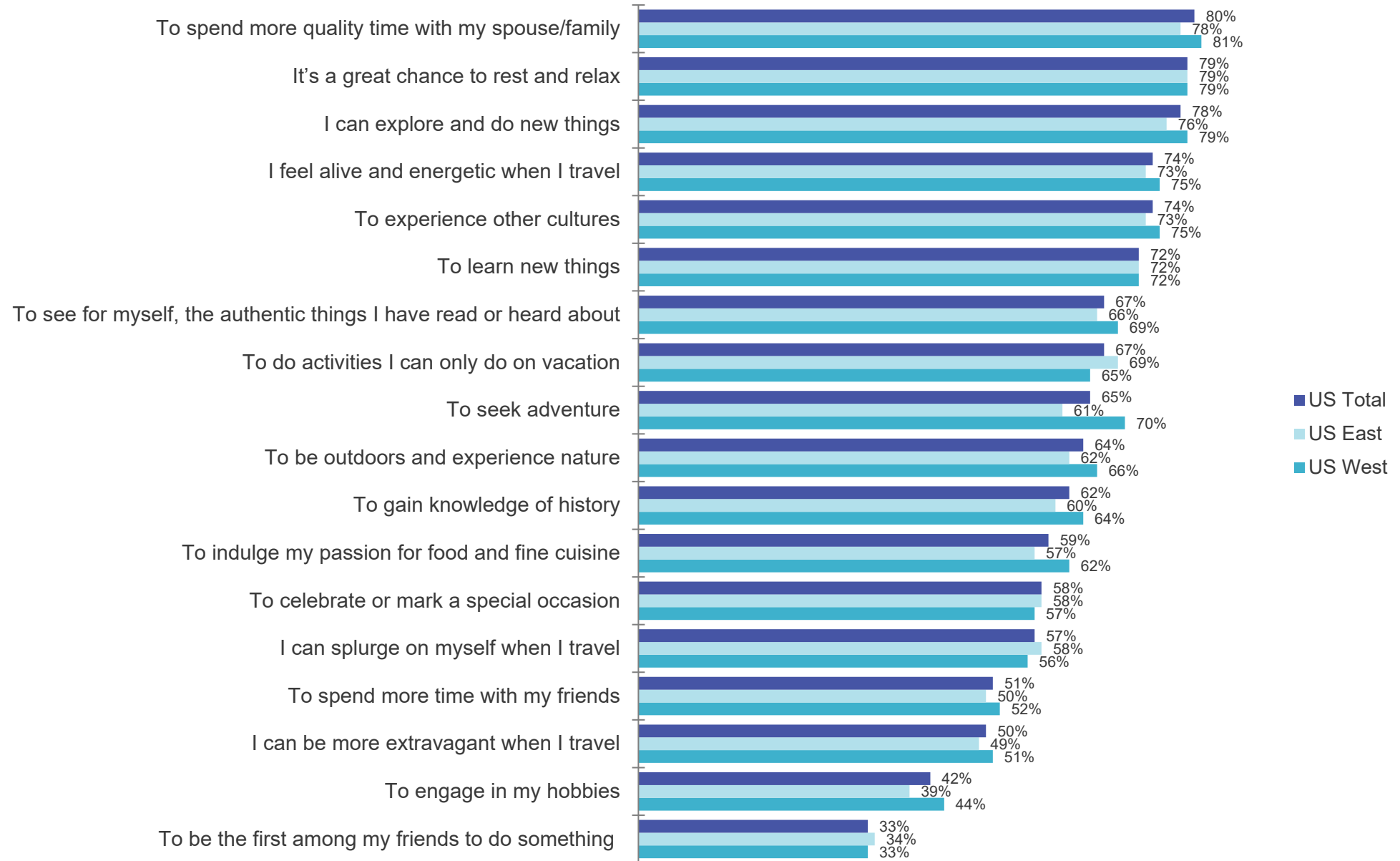
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Summary of Market – US

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years

US West		
1	Hawai'i	36%
2	Mexico	26%
3	Italy	18%
4	United Kingdom (UK)	18%
5	Caribbean	17%
6	France	17%
7	Other Europe	15%
8	Germany	12%
9	Alaska	11%
10	Central/South America	11%
11	Southeast Asia	10%
12	Australia	8%
13	Switzerland	6%

US East		
1	Florida	54%
2	Caribbean	30%
3	California	27%
4	Hawai'i	15%
5	Mexico	15%
6	Other Europe	15%
7	Italy	13%
8	France	13%
9	United Kingdom (UK)	11%
10	Puerto Rico	9%
11	Germany	8%
12	Central America	8%
13	South America	7%
14	Bermuda	7%
15	Southeast Asia	6%
16	Switzerland	6%
17	Iceland	4%
18	Cuba	3%

Destinations Visited Past 12 Months

US West		
1	Hawai'i	24%
2	Mexico	13%
3	United Kingdom (UK)	11%
4	Caribbean	9%
5	France	9%
6	Italy	8%
7	Other Europe	7%
8	Central/South America	6%
9	Alaska	6%
10	Germany	5%
11	Southeast Asia	5%
12	Australia	4%
13	Switzerland	3%

US East		
1	Florida	43%
2	Caribbean	18%
3	California	18%
4	Mexico	9%
5	United Kingdom (UK)	7%
6	Other Europe	7%
7	Hawaii	7%
8	Italy	6%
9	France	6%
10	Puerto Rico	5%
11	Central America	5%
12	South America	4%
13	Bermuda	4%
14	Germany	3%
15	Southeast Asia	3%
16	Switzerland	3%
17	Cuba	2%
18	Iceland	2%

Destinations Considering for Next Overnight Vacation

US West		
1	Hawai'i	43%
2	United Kingdom	24%
3	Italy	23%
4	Caribbean	22%
5	France	21%
6	Mexico	21%
7	Australia	16%
8	Alaska	16%
9	Other Europe	15%
10	Central/South America	13%
11	Germany	12%
12	Switzerland	11%
13	Southeast Asia	11%

US East		
1	Florida	36%
2	Caribbean	28%
3	California	20%
4	Hawai'i	19%
5	Italy	16%
6	United Kingdom	15%
7	Other Europe	13%
8	France	12%
9	Mexico	12%
10	Bermuda	11%
11	Puerto Rico	9%
12	South America	8%
13	Germany	7%
14	Iceland	7%
15	Southeast Asia	6%
16	Switzerland	6%
17	Central America	6%
18	Cuba	4%

Destinations Interested in Visiting Next 24 Months

US West		
1	Hawai'i	49%
2	Italy	28%
3	United Kingdom (UK)	24%
4	France	24%
5	Alaska	24%
6	Australia	24%
7	Caribbean	24%
8	Germany	20%
9	Mexico	18%
10	Other Europe	18%
11	Switzerland	18%
12	Southeast Asia	16%
13	Central/South America	14%

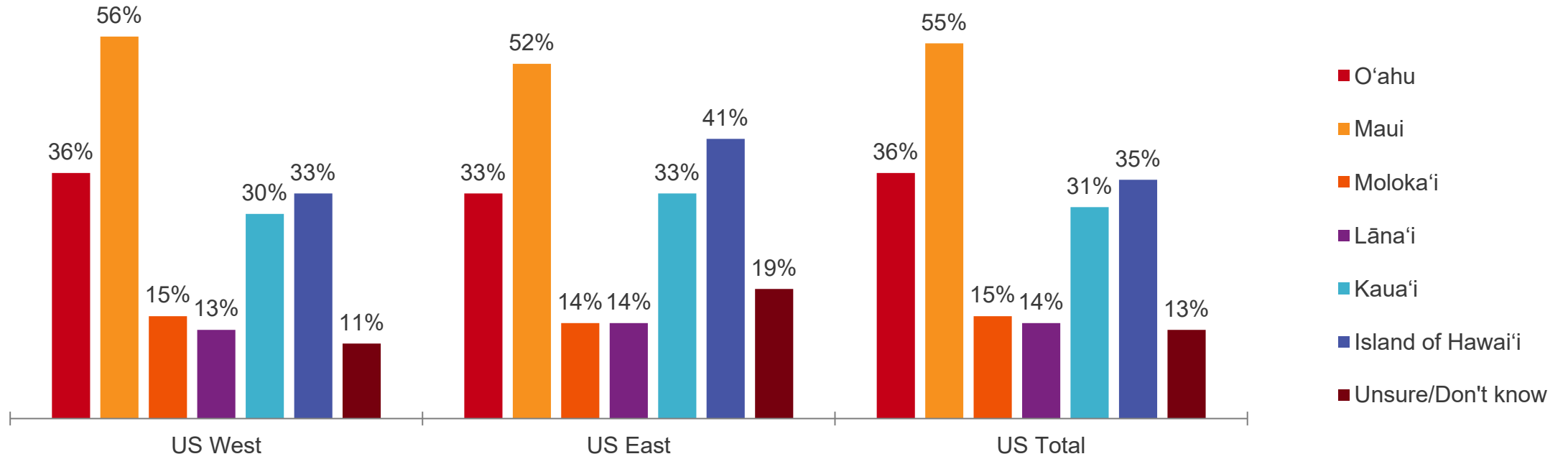
US East		
1	Florida	38%
2	Caribbean	33%
3	Hawai'i	28%
4	Italy	26%
5	California	25%
6	Other Europe	21%
7	United Kingdom (UK)	20%
8	France	18%
9	Bermuda	16%
10	Germany	14%
11	Switzerland	13%
12	Mexico	12%
13	Puerto Rico	11%
14	Iceland	11%
15	South America	10%
16	Central America	9%
17	Southeast Asia	8%
18	Cuba	5%

Destinations Plan to Visit Next 12 Months

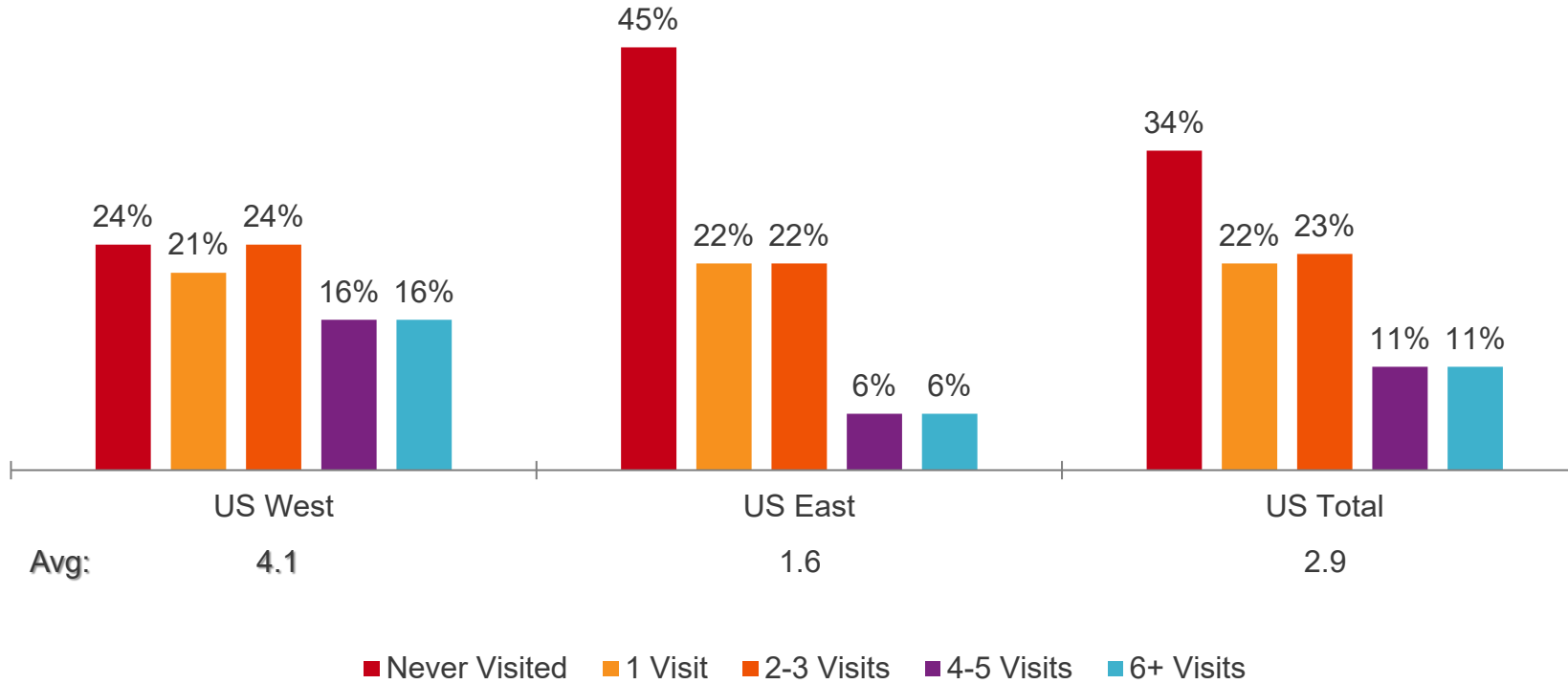
US West		
1	Hawai'i	31%
2	Mexico	11%
3	Italy	11%
4	United Kingdom (UK)	10%
5	Other Europe	9%
6	France	9%
7	Alaska	8%
8	Germany	8%
9	Australia	8%
10	Caribbean	8%
11	Southeast Asia	7%
12	Central/South America	6%
13	Switzerland	6%

US East		
1	Florida	27%
2	Caribbean	16%
3	California	14%
4	Italy	12%
5	Other Europe	11%
6	Hawai'i	11%
7	United Kingdom (UK)	9%
8	France	7%
9	Germany	6%
10	Bermuda	5%
11	Mexico	5%
12	Puerto Rico	5%
13	South America	5%
14	Switzerland	4%
15	Central America	4%
16	Southeast Asia	3%
17	Iceland	3%
18	Cuba	1%

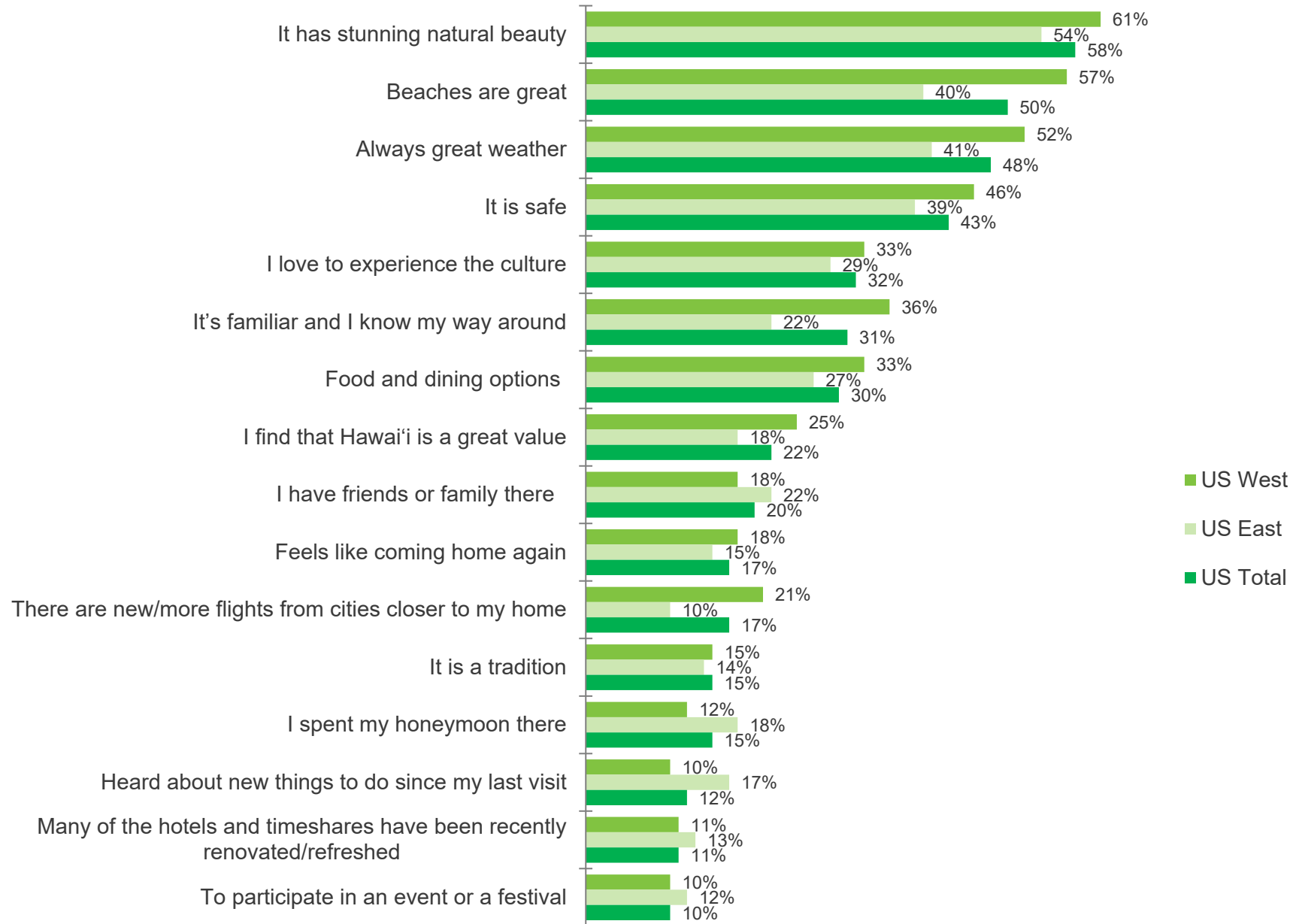
Hawaiian Islands Plan to Visit Next 12 Months



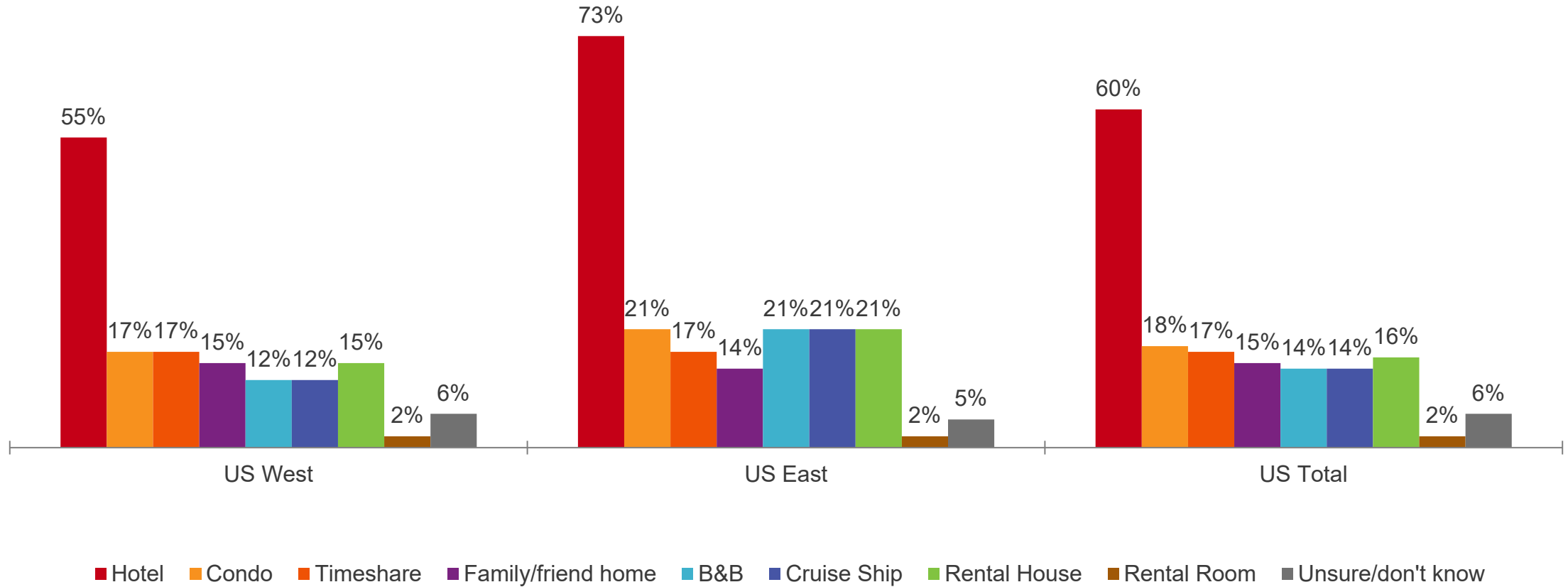
Number of Times Visited Hawai'i in Lifetime



Reasons for Returning to Hawai'i



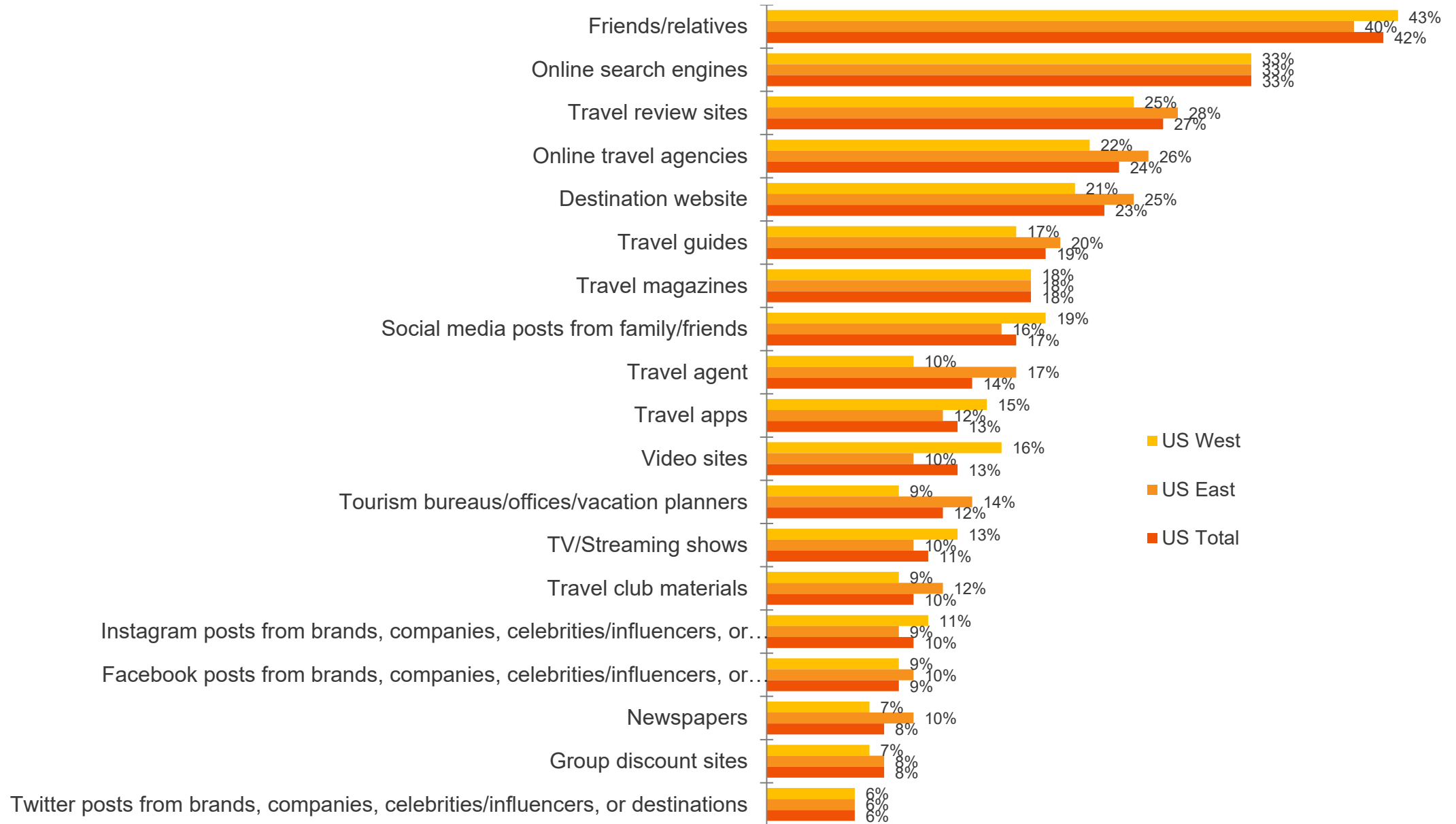
Hawai'i Planned Accommodations



Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



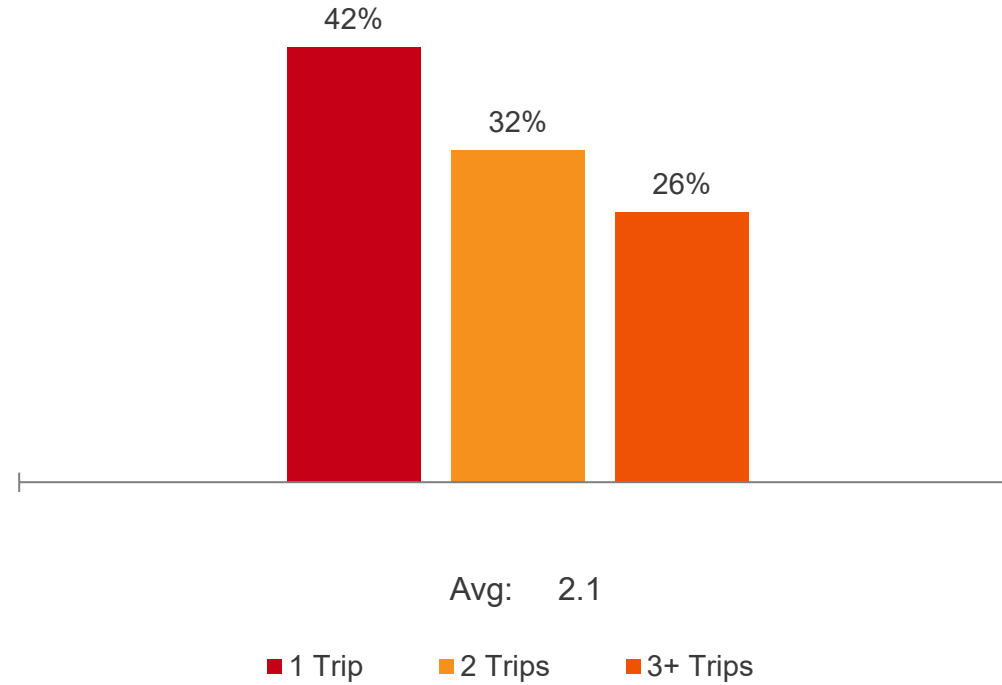
Travel Planning and Booking Sources



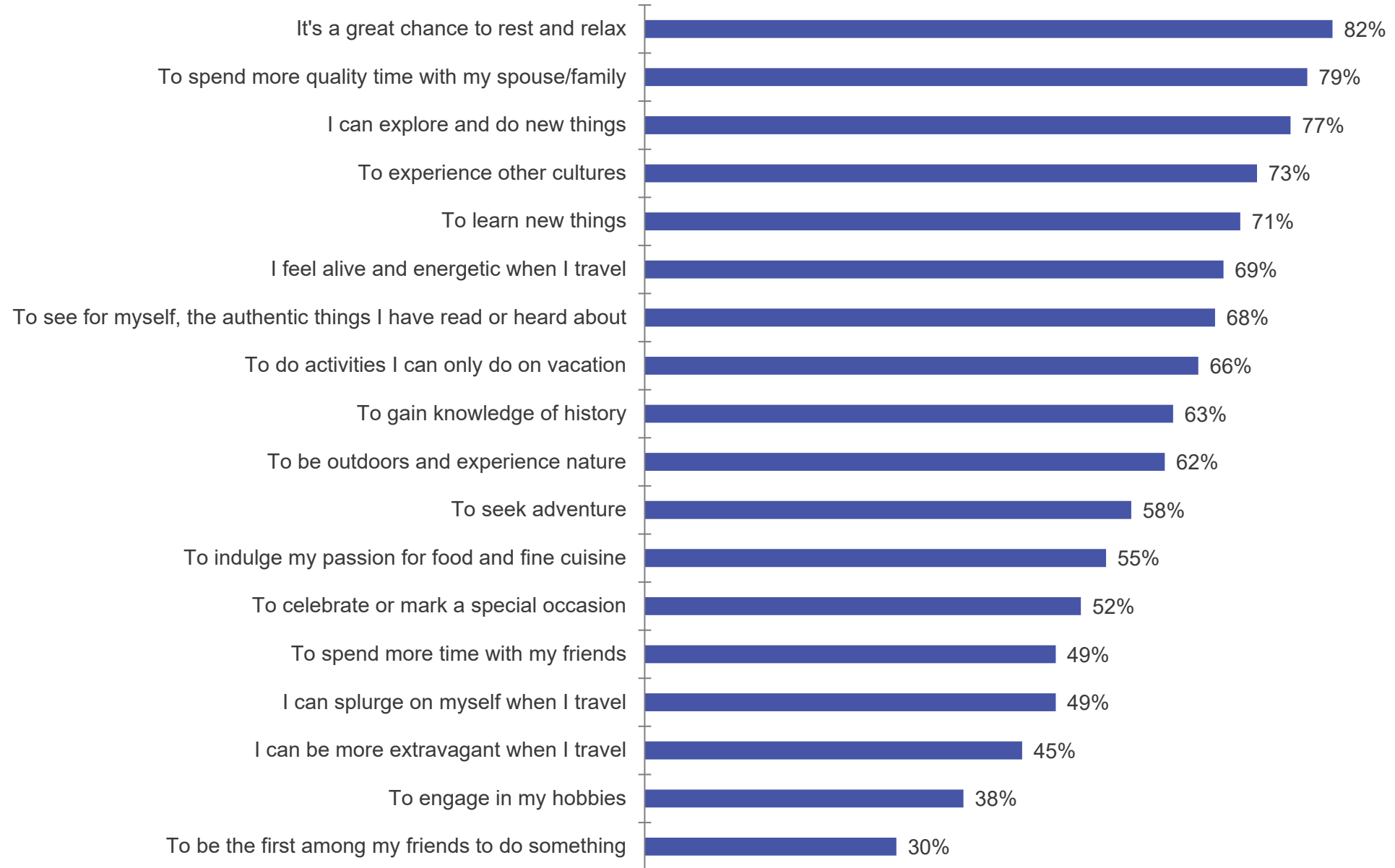
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Summary of Markets – Canada

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	36%
2	Florida	31%
3	Caribbean	30%
4	Mexico	28%
5	Las Vegas	28%
6	California	25%
7	Hawai'i	15%
8	Arizona	11%

Visited Past Year		
1	Europe	23%
2	Caribbean	19%
3	Florida	17%
4	Mexico	16%
5	California	15%
6	Las Vegas	13%
7	Hawai'i	9%
8	Arizona	5%

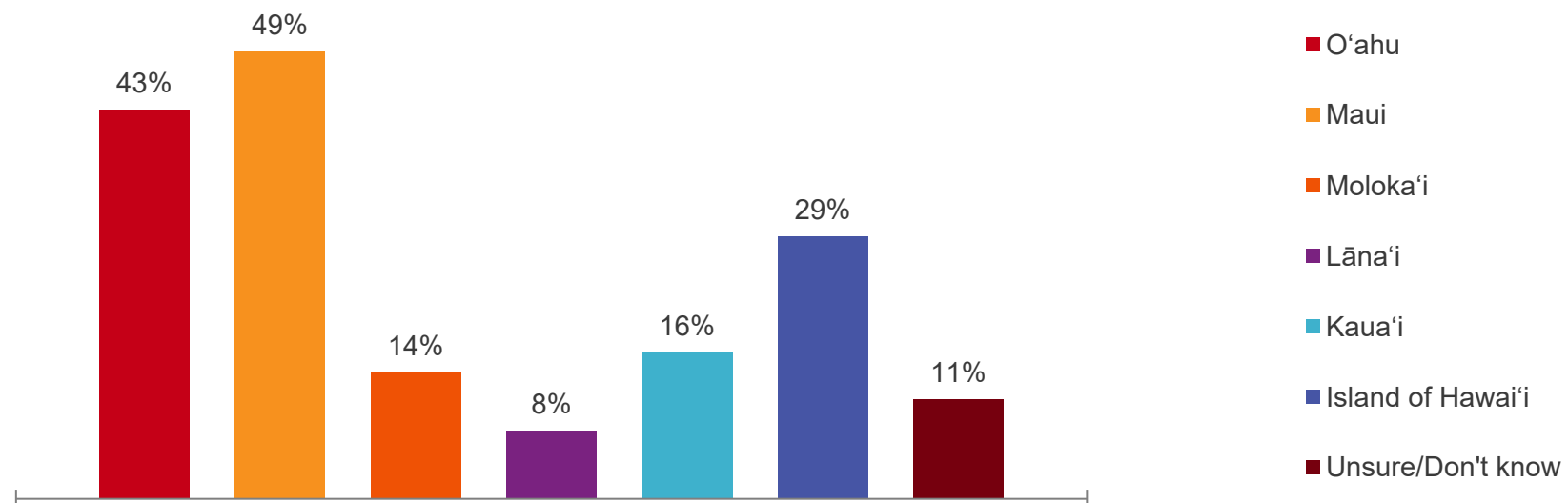
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	35%
2	Caribbean	28%
3	Las Vegas	27%
4	Florida	26%
5	California	26%
6	Hawai'i	22%
7	Mexico	22%
8	Arizona	11%

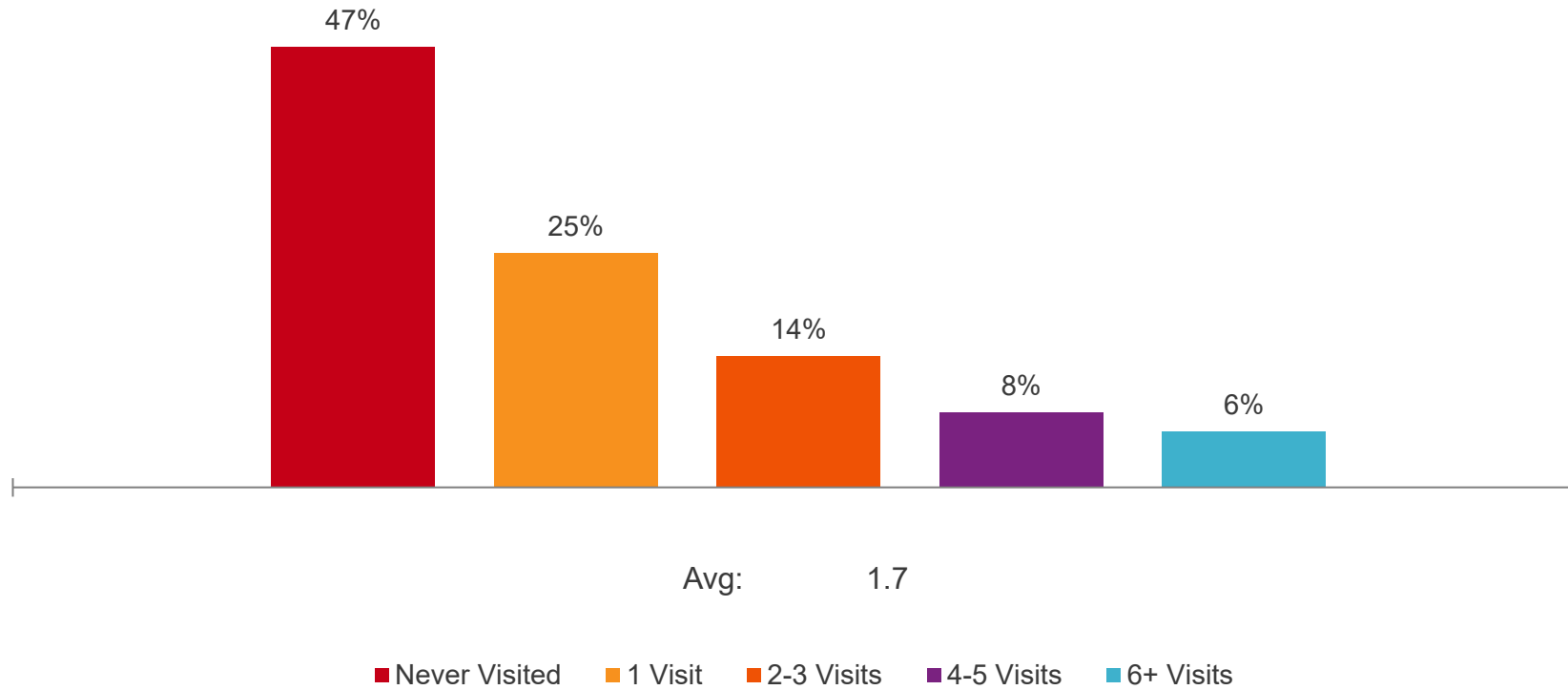
Interested Next 24 Months		
1	Europe	48%
2	Caribbean	39%
3	Hawai'i	38%
4	California	32%
5	Florida	31%
6	Las Vegas	29%
7	Mexico	26%
8	Las Vegas	19%

Planning Next 12 Months		
1	Europe	27%
2	Caribbean	21%
3	Florida	17%
4	Las Vega	16%
5	Hawai'i	15%
6	California	15%
7	Mexico	14%
8	Arizona	7%

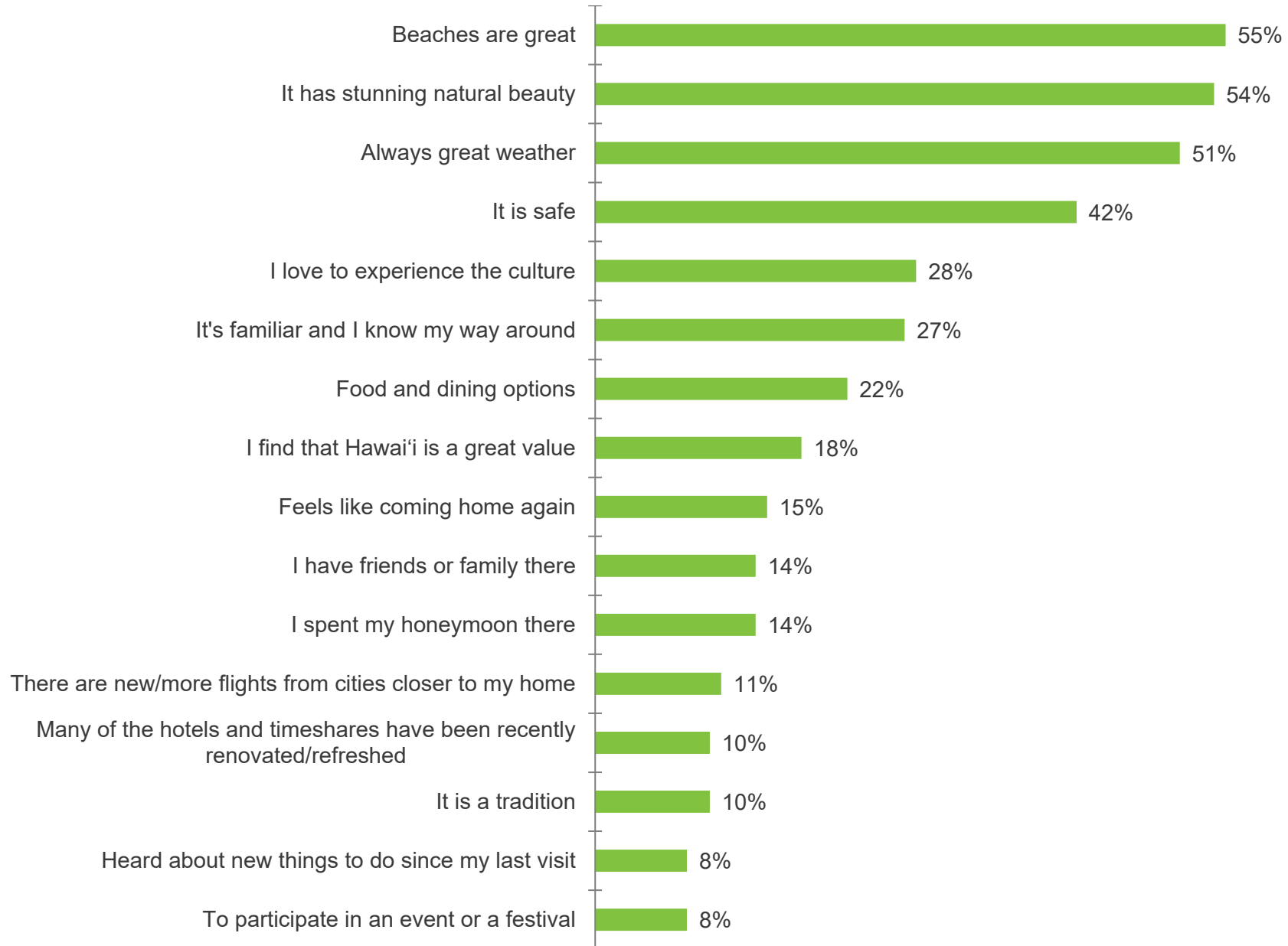
Hawaiian Islands Plan to Visit Next 12 Months



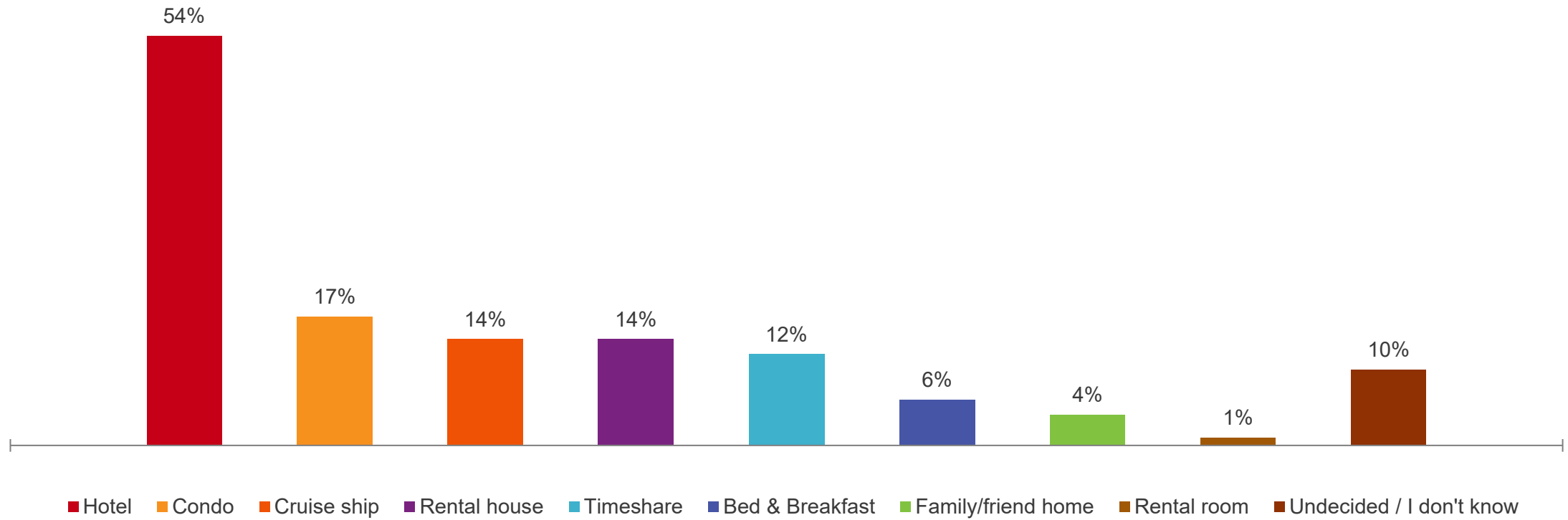
Number of Times Visited Hawai'i in Lifetime



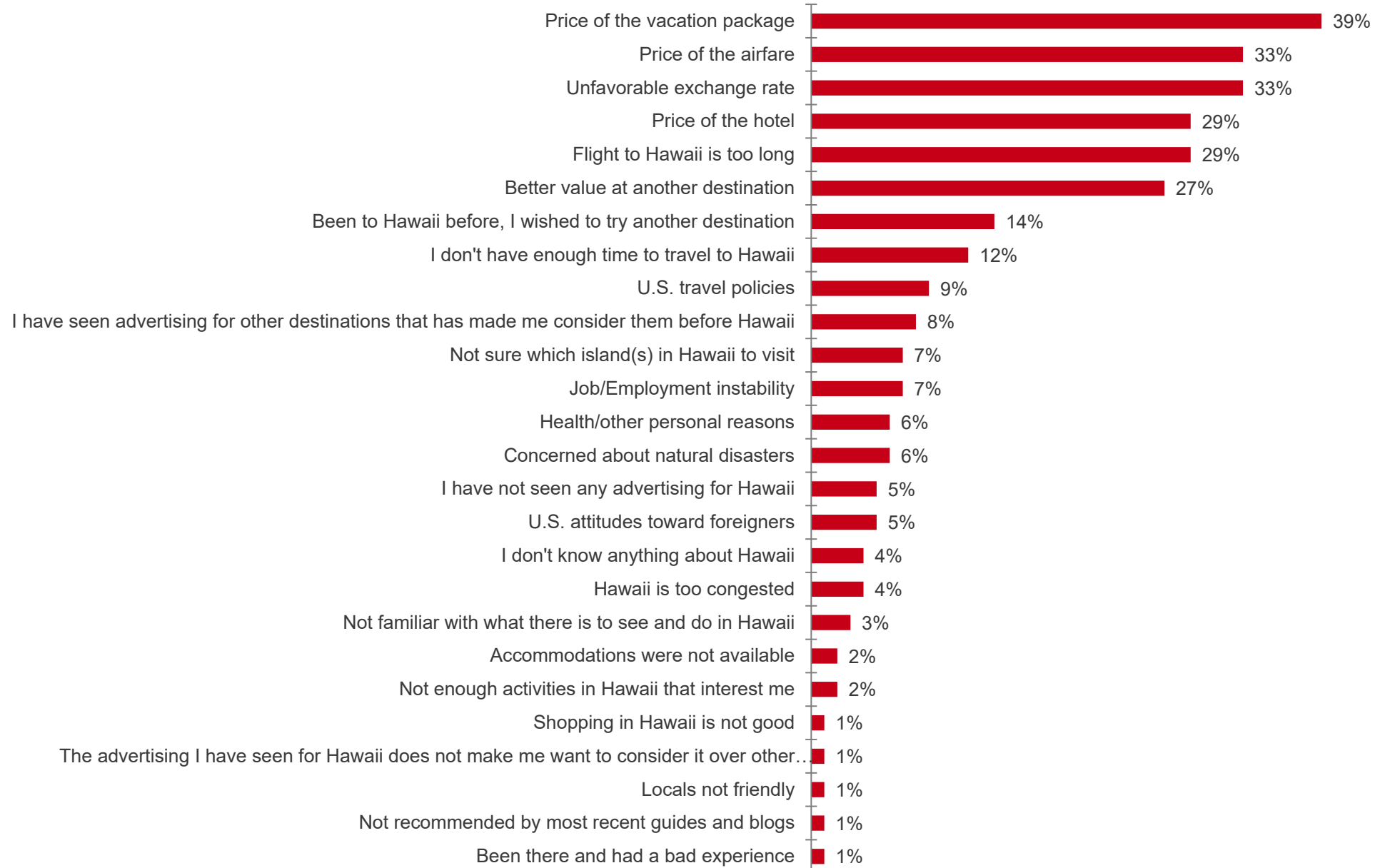
Reasons for Returning to Hawai'i



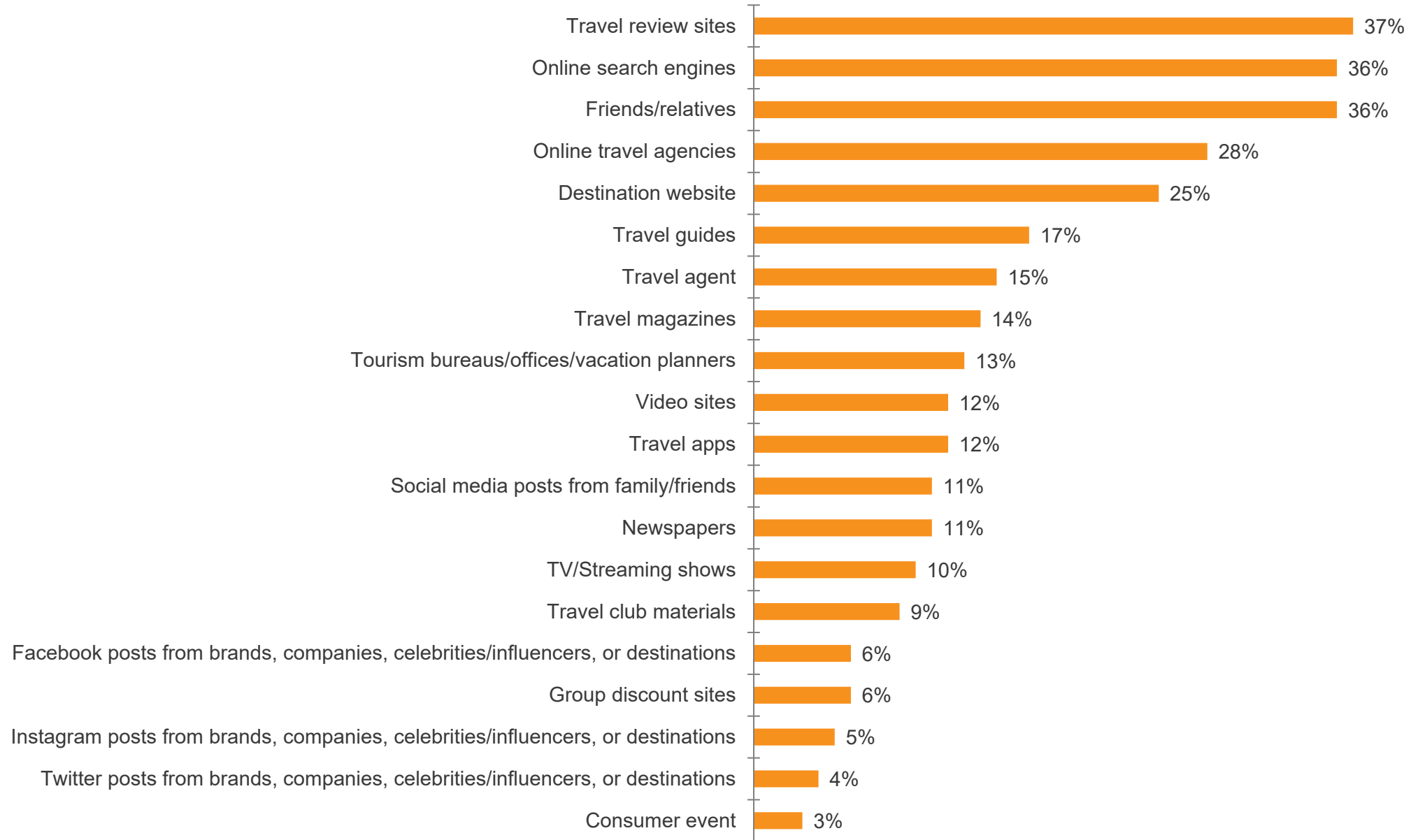
Hawai'i Planned Accommodations



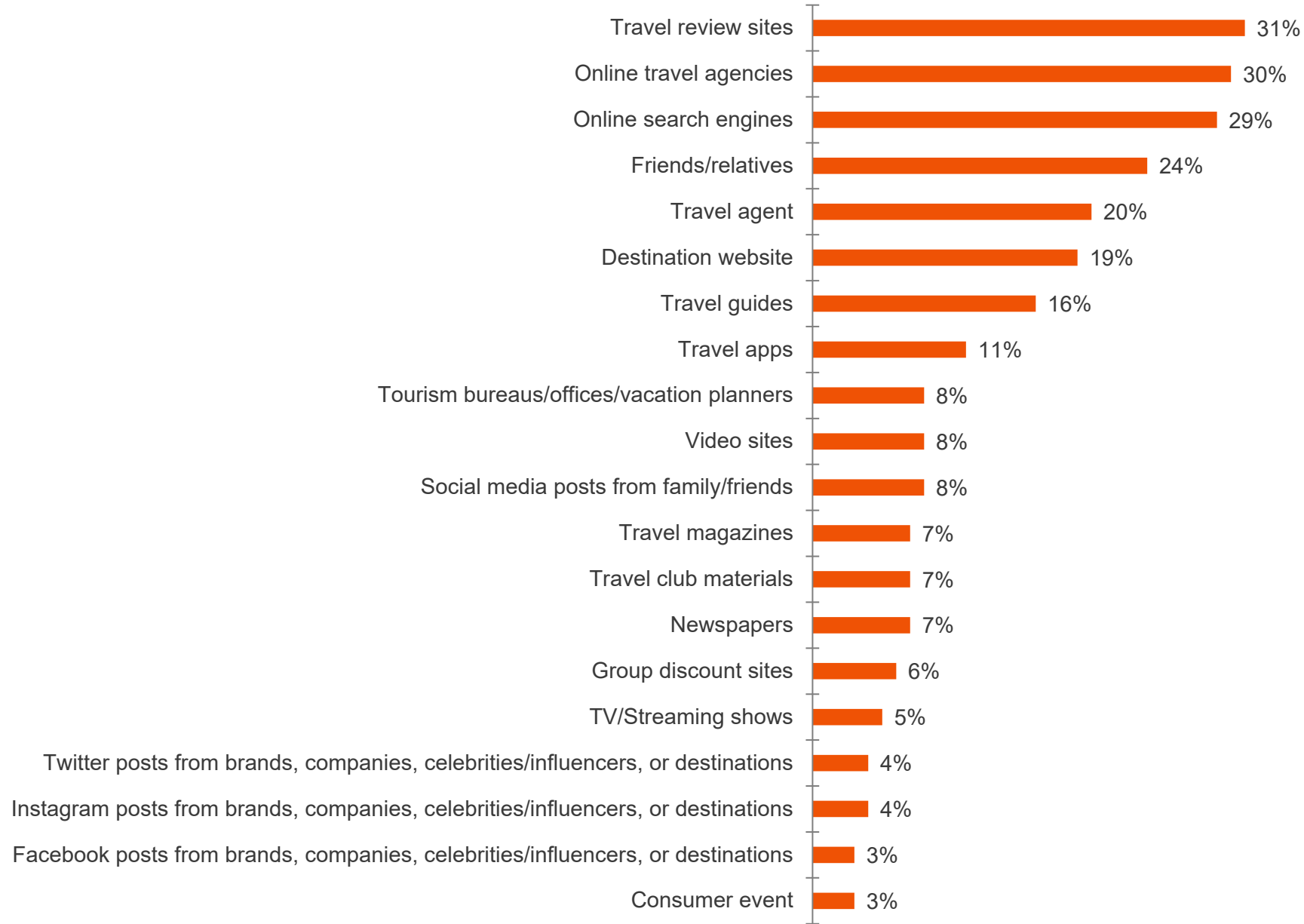
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



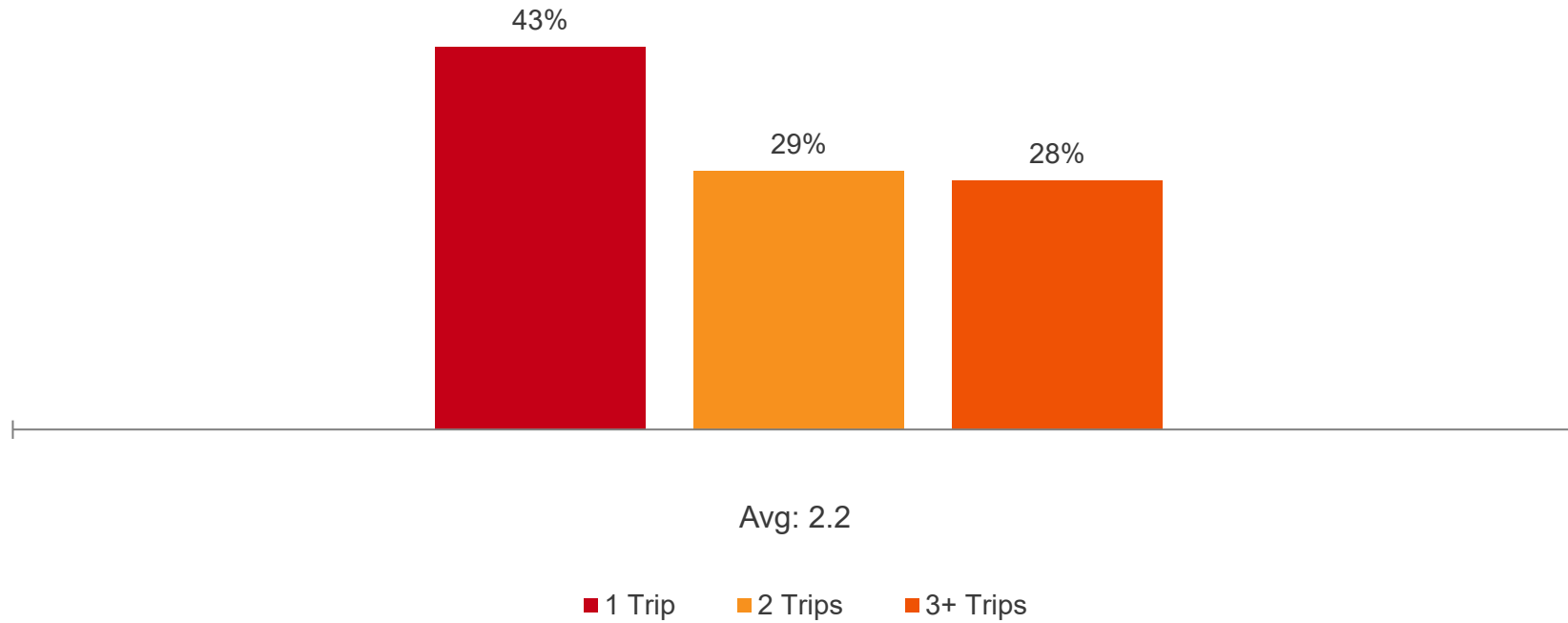
Travel Planning and Booking Sources



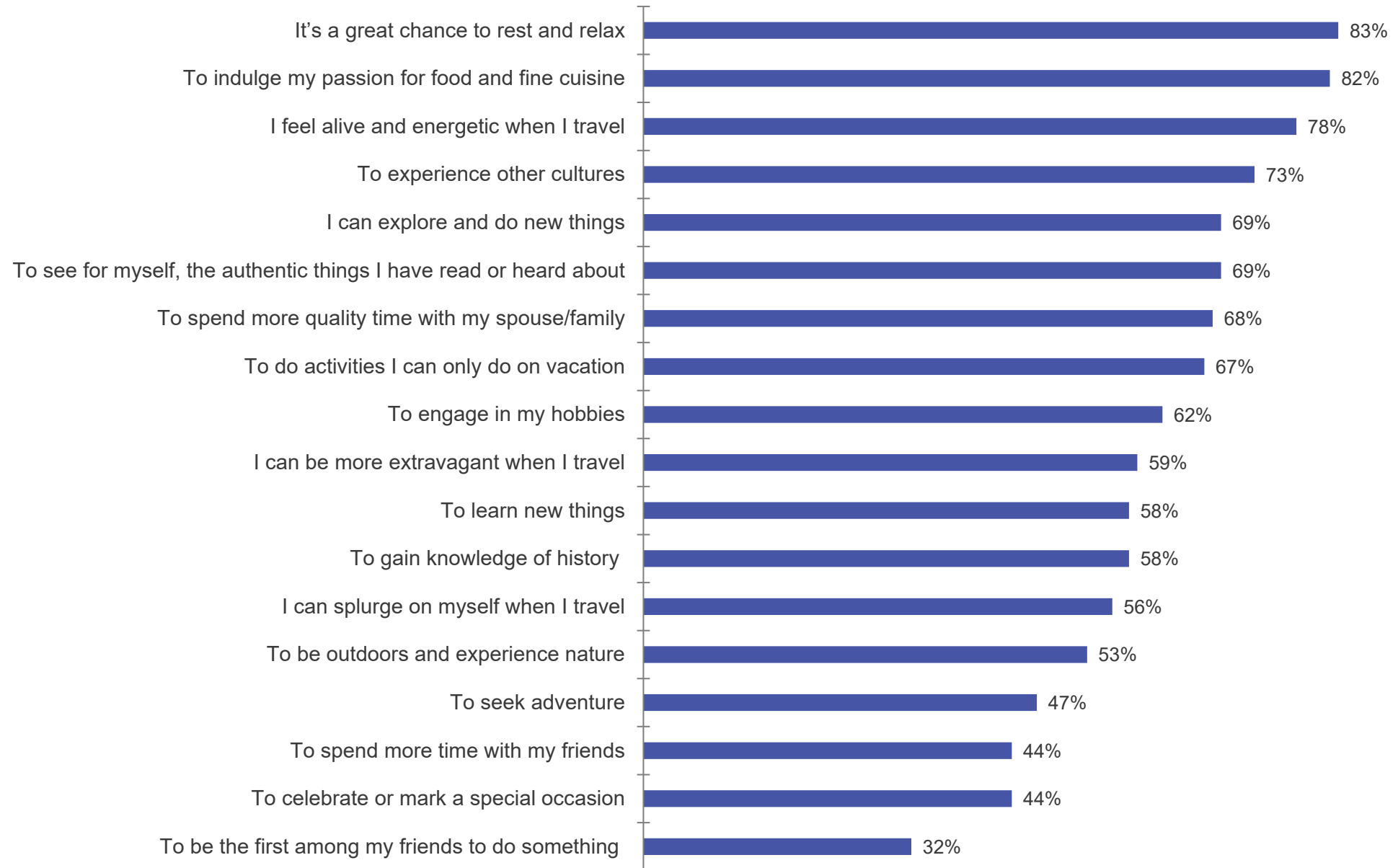
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Summary of Markets – Japan

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Hawai'i	36%
2	Europe	35%
3	Australia	25%
4	Singapore	22%
5	Guam	19%
6	Korea	17%
7	China	16%

Visited Past Year		
1	Europe	24%
2	Hawai'i	23%
3	Australia	14%
4	Singapore	13%
5	Korea	12%
6	China	9%
7	Guam	8%

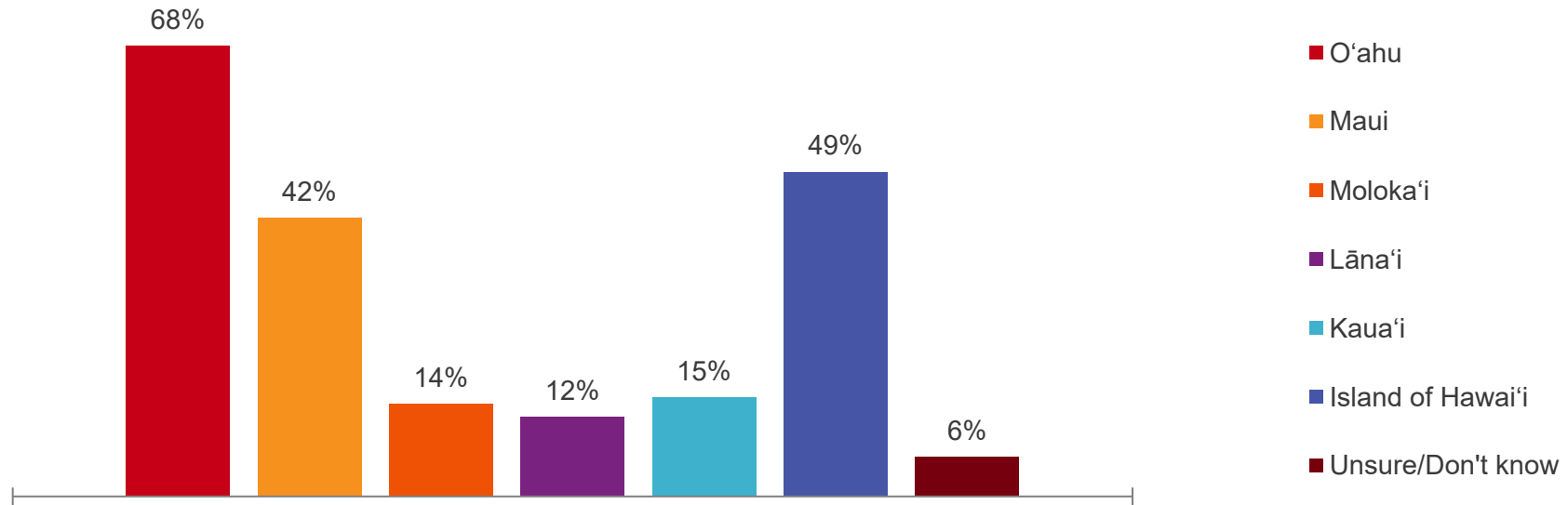
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Hawai'i	38%
2	Europe	36%
3	Australia	36%
4	Taiwan	32%
5	Singapore	25%
6	Guam/Saipan	19%
7	Thailand	19%
8	Hong Kong	18%
9	Korea	16%
10	China	13%

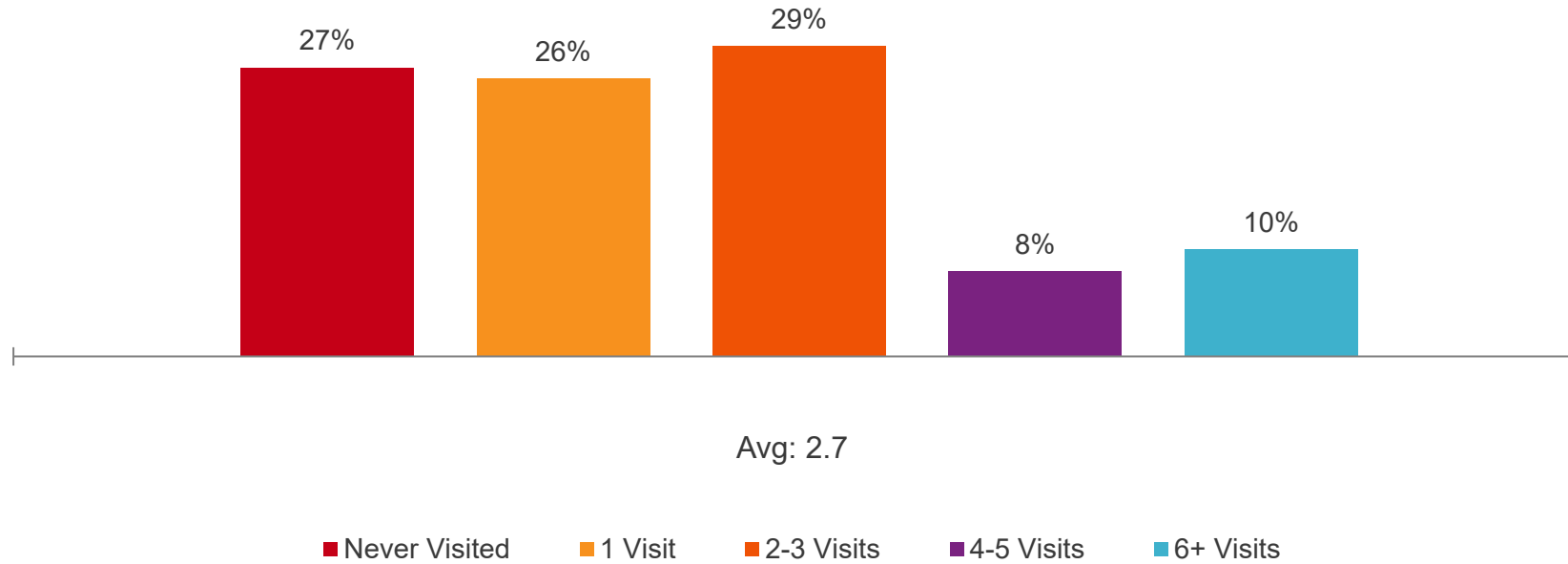
Interested Next 24 Months		
1	Europe	51%
2	Hawai'i	49%
3	Australia	48%
4	Singapore	30%
5	Guam	28%
6	Korea	14%
7	China	12%

Planning Next 12 Months		
1	Europe	27%
2	Hawai'i	26%
3	Australia	21%
4	Singapore	13%
5	Guam	11%
6	Korea	7%
7	China	4%

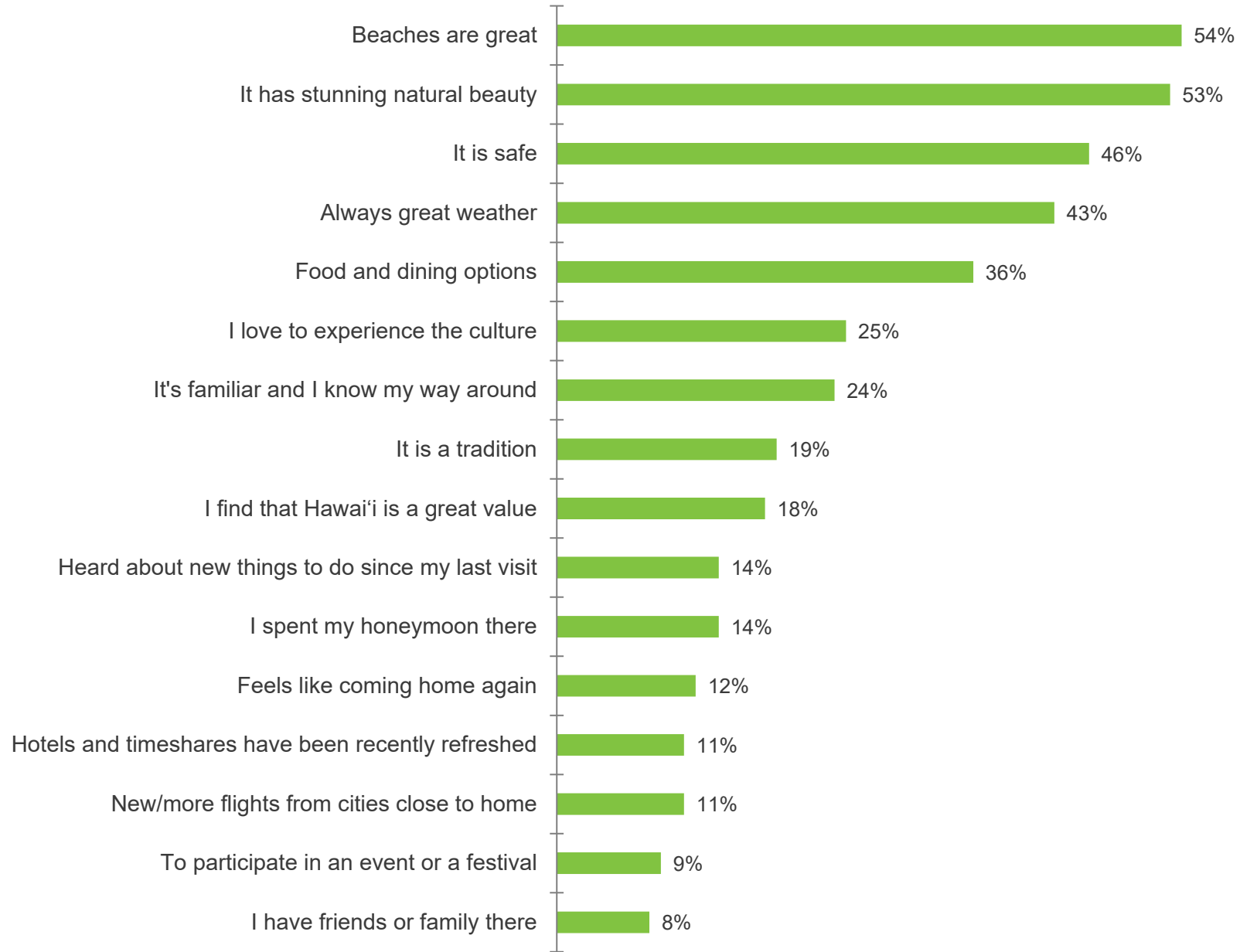
Hawaiian Islands Plan to Visit Next 12 Months



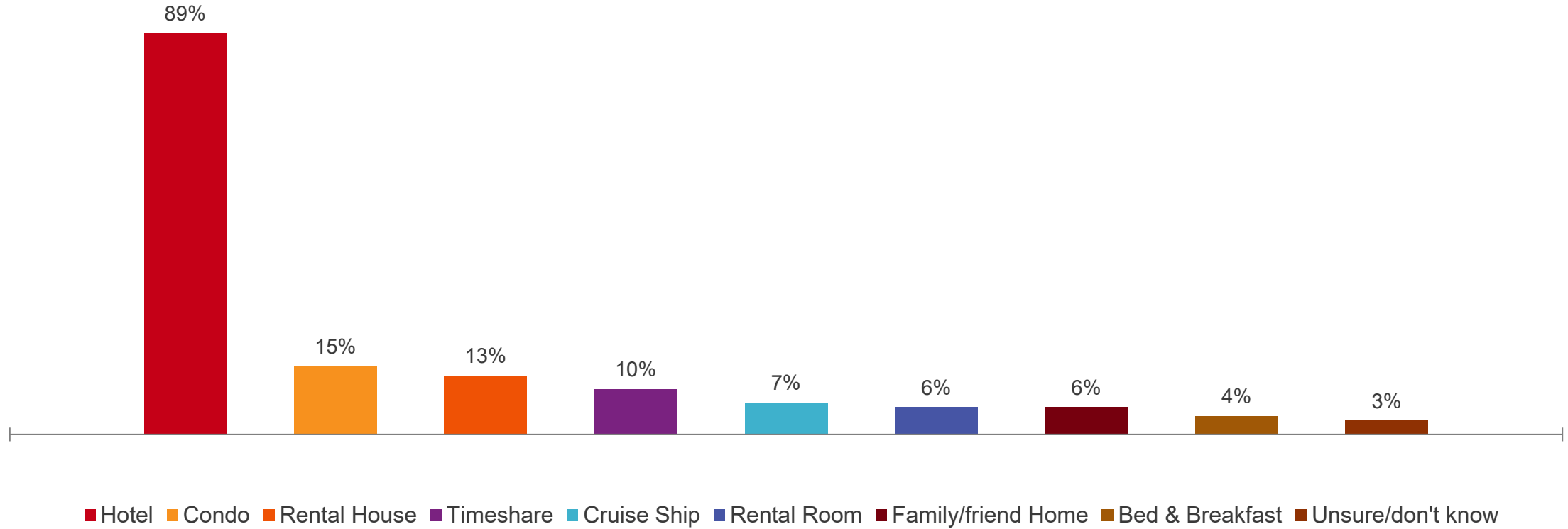
Number of Times Visited Hawai'i in Lifetime



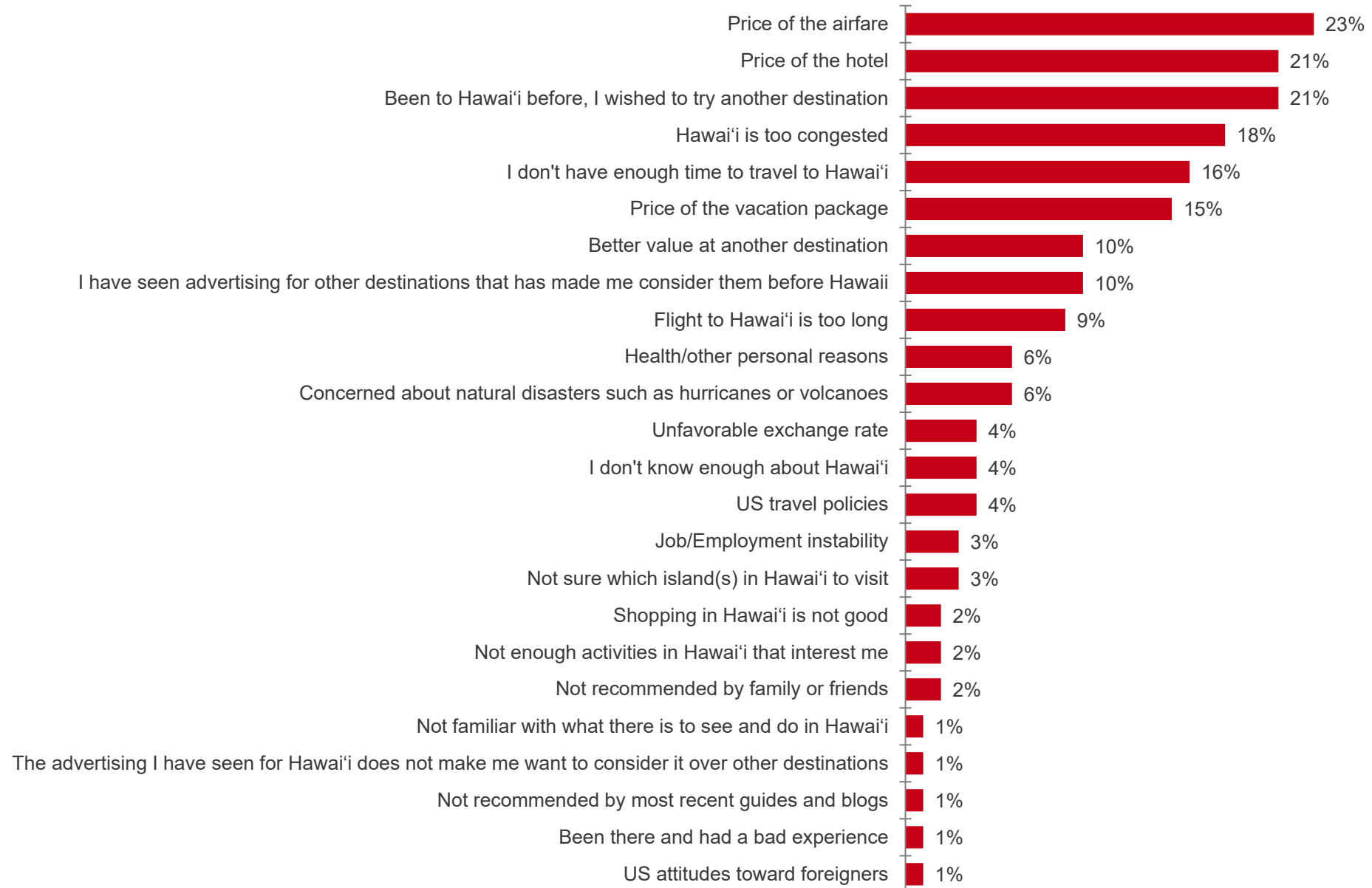
Reasons for Returning to Hawai'i



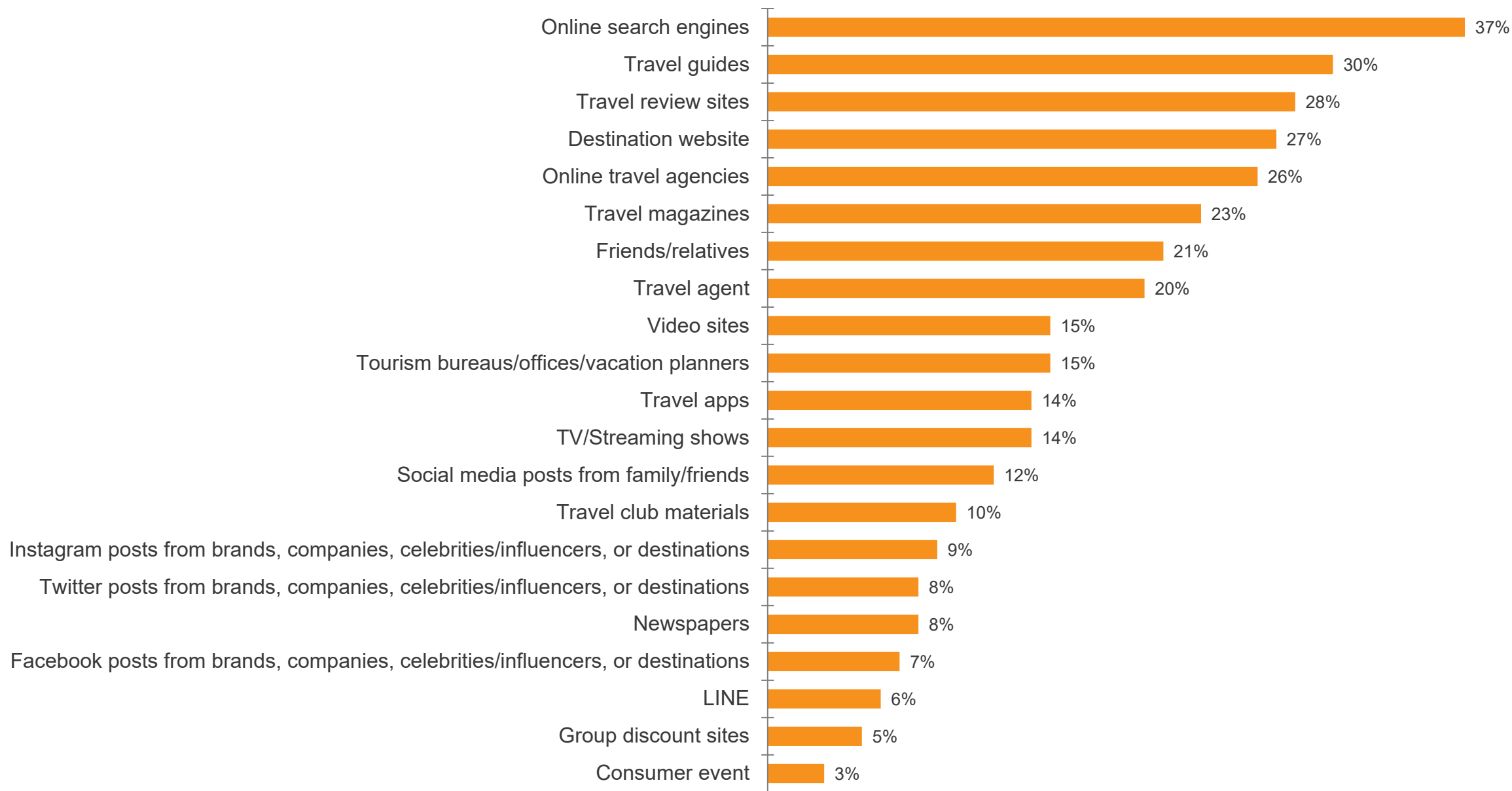
Hawai'i Planned Accommodations



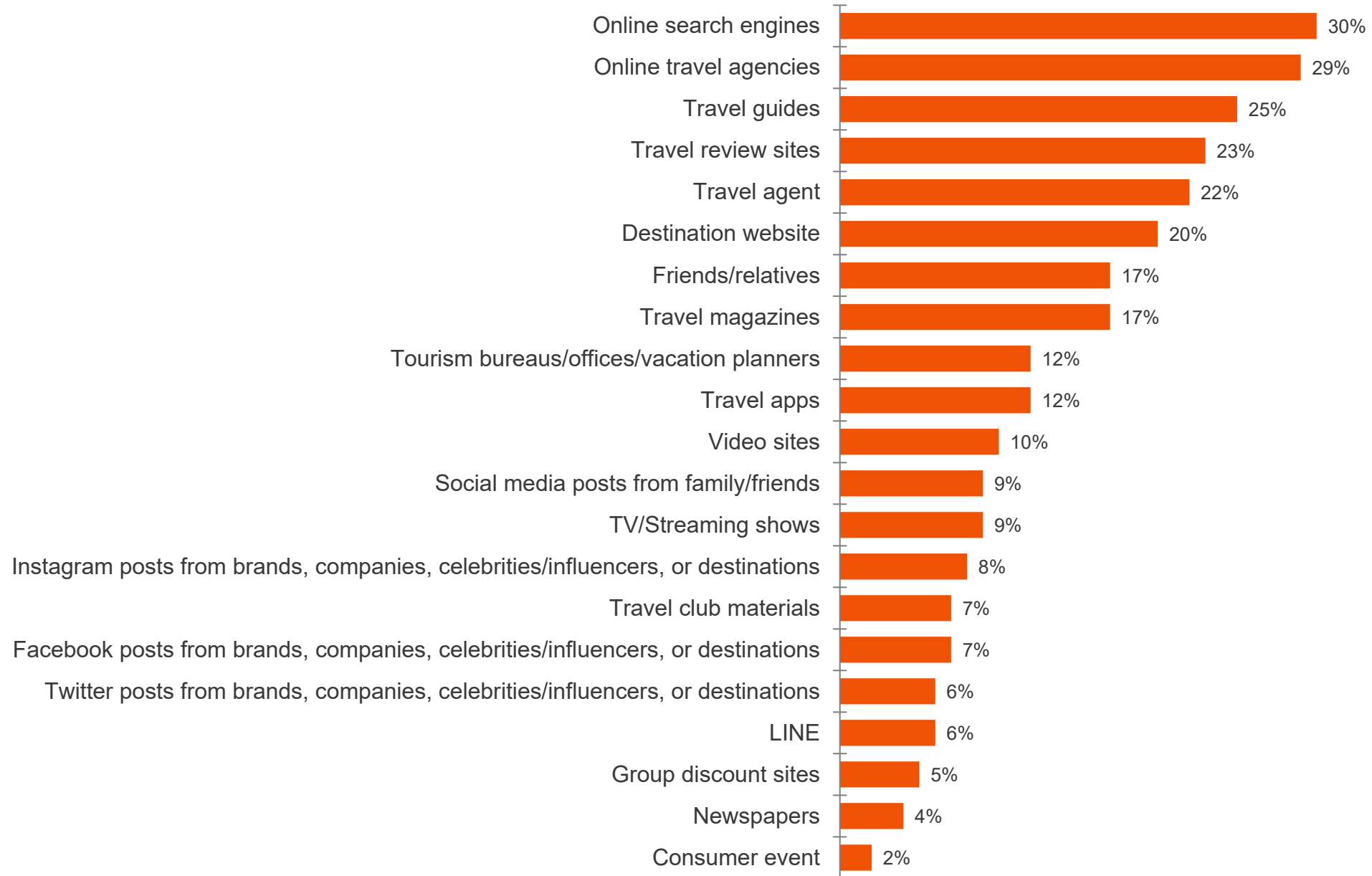
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



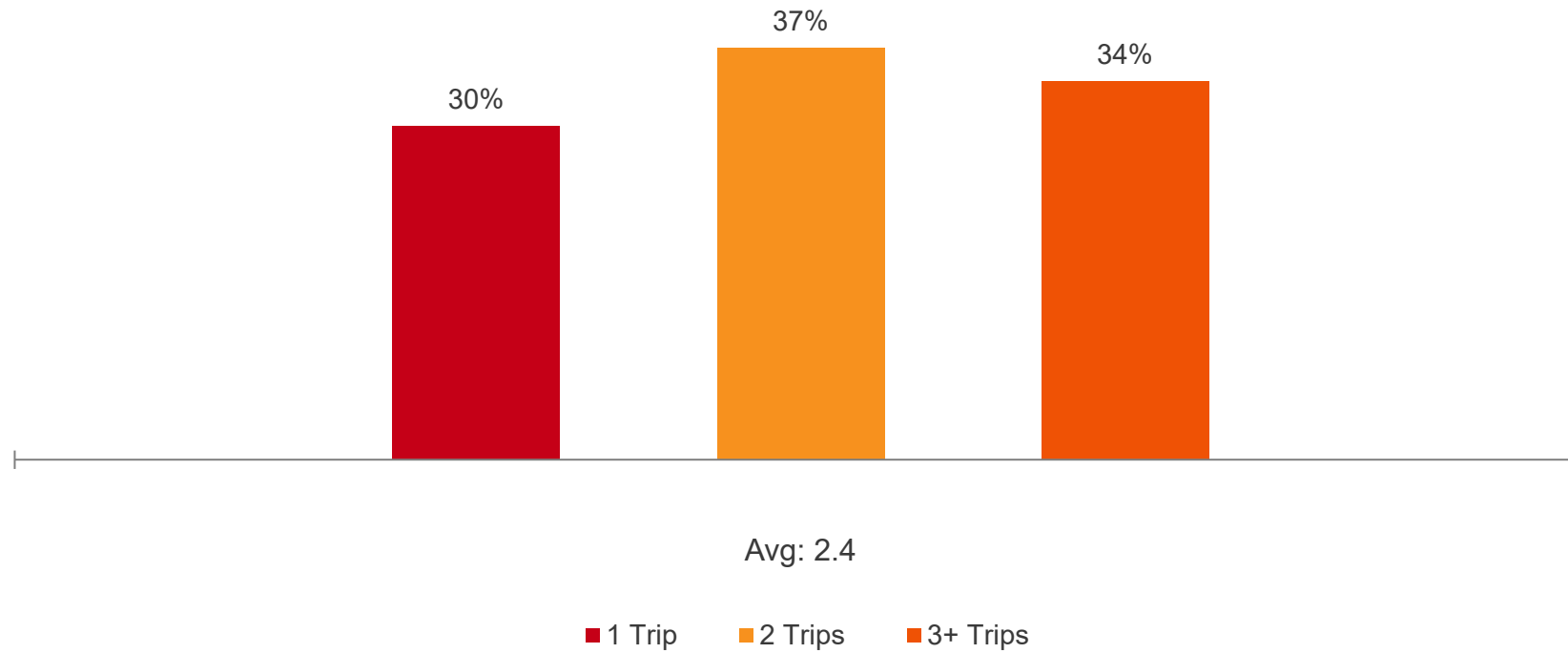
Travel Planning and Booking Sources



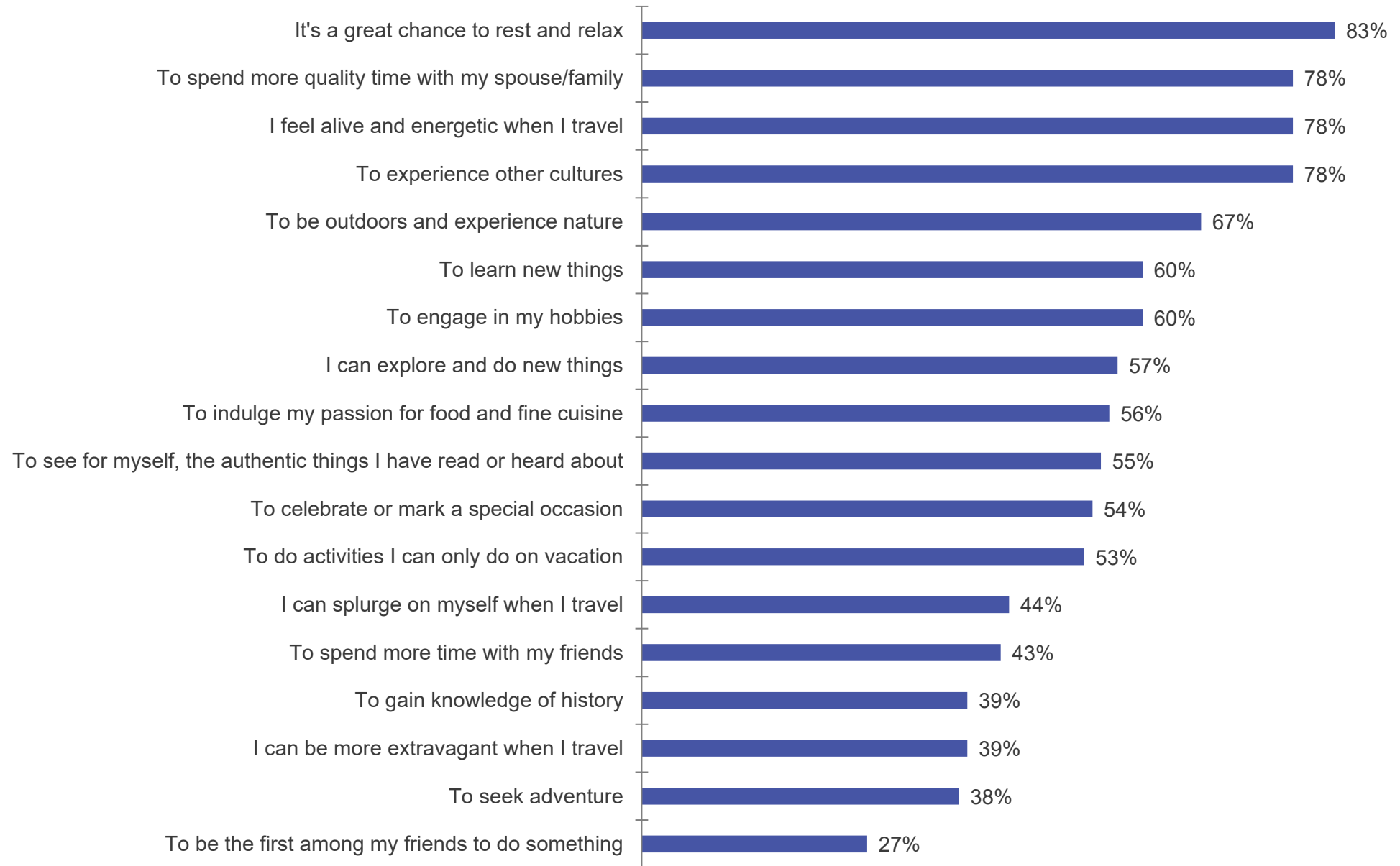
4

Summary of Markets – Korea

Number of Leisure Trips Taken in Past 12 Months



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Southeast Asia	57%
2	Japan	50%
3	China	32%
4	Europe	26%
5	USA	20%
6	Australia	16%
7	Hawai'i	14%
8	Maldives	5%

Visited Past Year		
1	Southeast Asia	39%
2	Japan	33%
3	China	17%
4	Europe	16%
5	USA	13%
6	Australia	10%
7	Hawai'i	7%
8	Maldives	3%

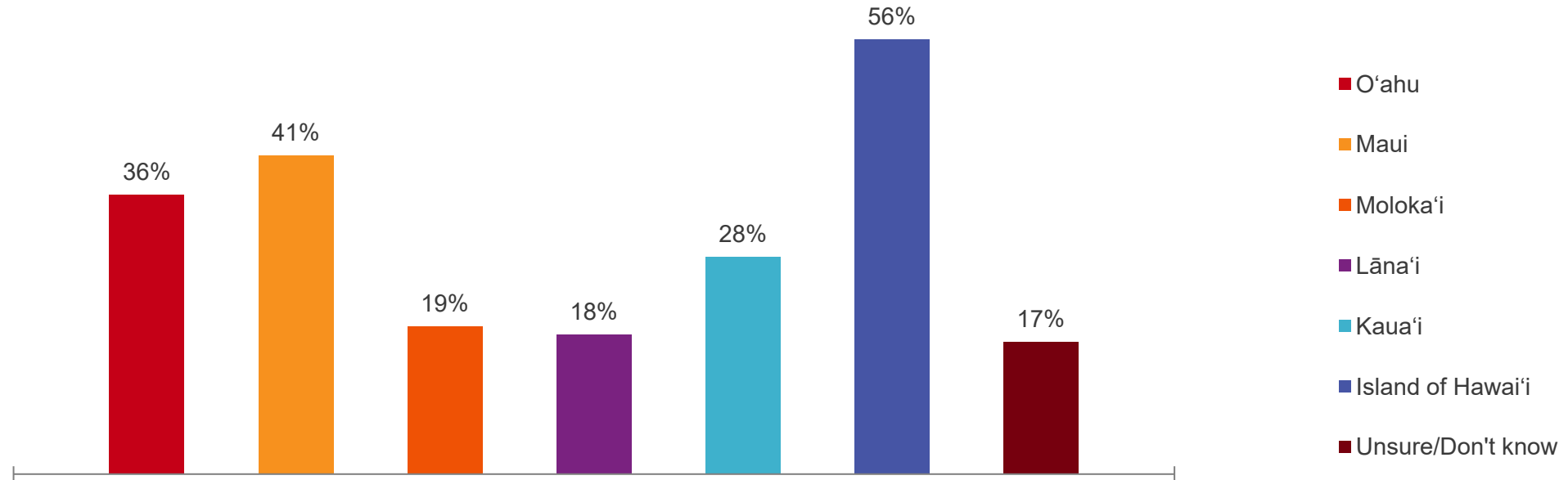
Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Southeast Asia	47%
2	Europe	39%
3	Australia	30%
4	USA	27%
5	Guam/Saipan	25%
6	Hawai'i	25%
7	Japan	25%
8	Maldives	16%

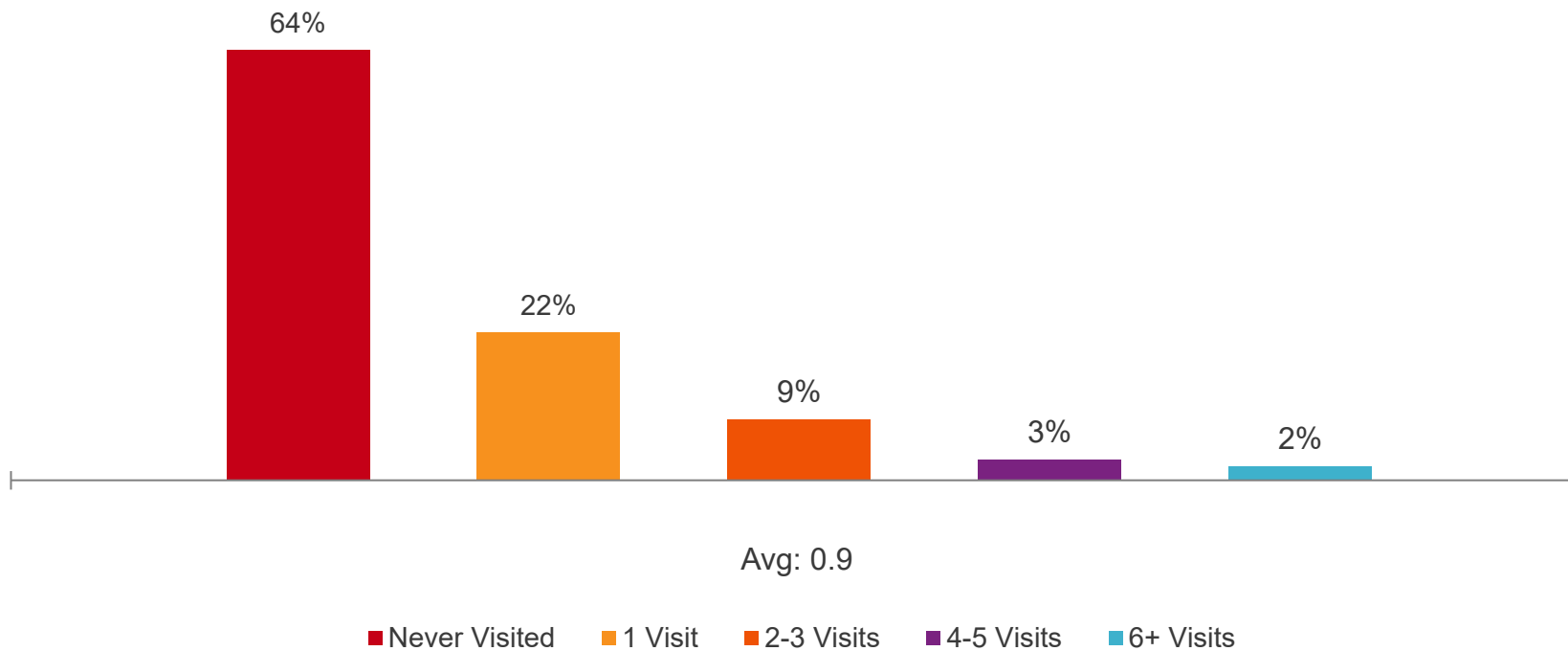
Interested Next 24 Months		
1	Europe	46%
2	Southeast Asia	43%
3	Hawai'i	37%
4	Australia	35%
5	USA	31%
6	Maldives	21%
7	Japan	19%
8	China	17%

Planning Next 12 Months		
1	Southeast Asia	34%
2	Europe	25%
3	Australia	19%
4	Hawai'i	18%
5	USA	16%
6	Japan	13%
7	Maldives	10%
8	China	10%

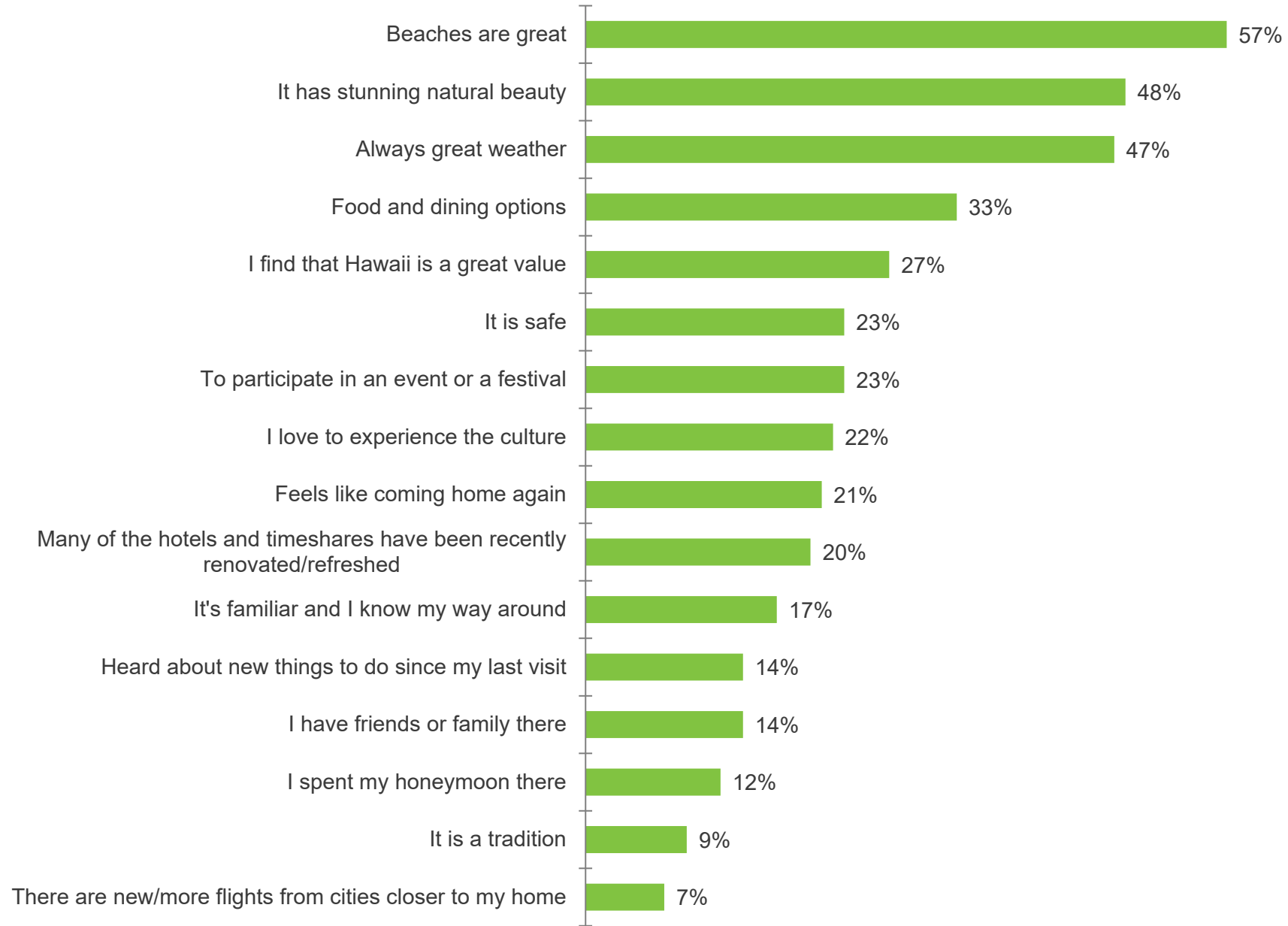
Hawai'i Islands Plan to Visit Next 12 Months



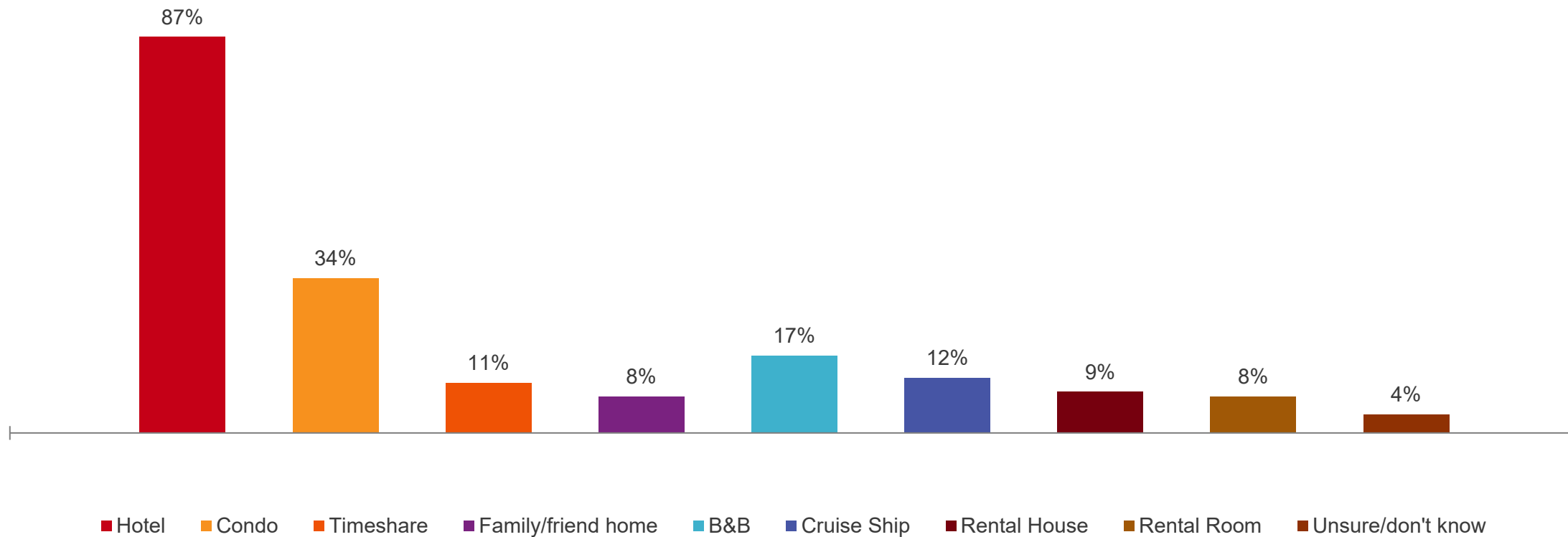
Number of Times Visited Hawai'i in Lifetime



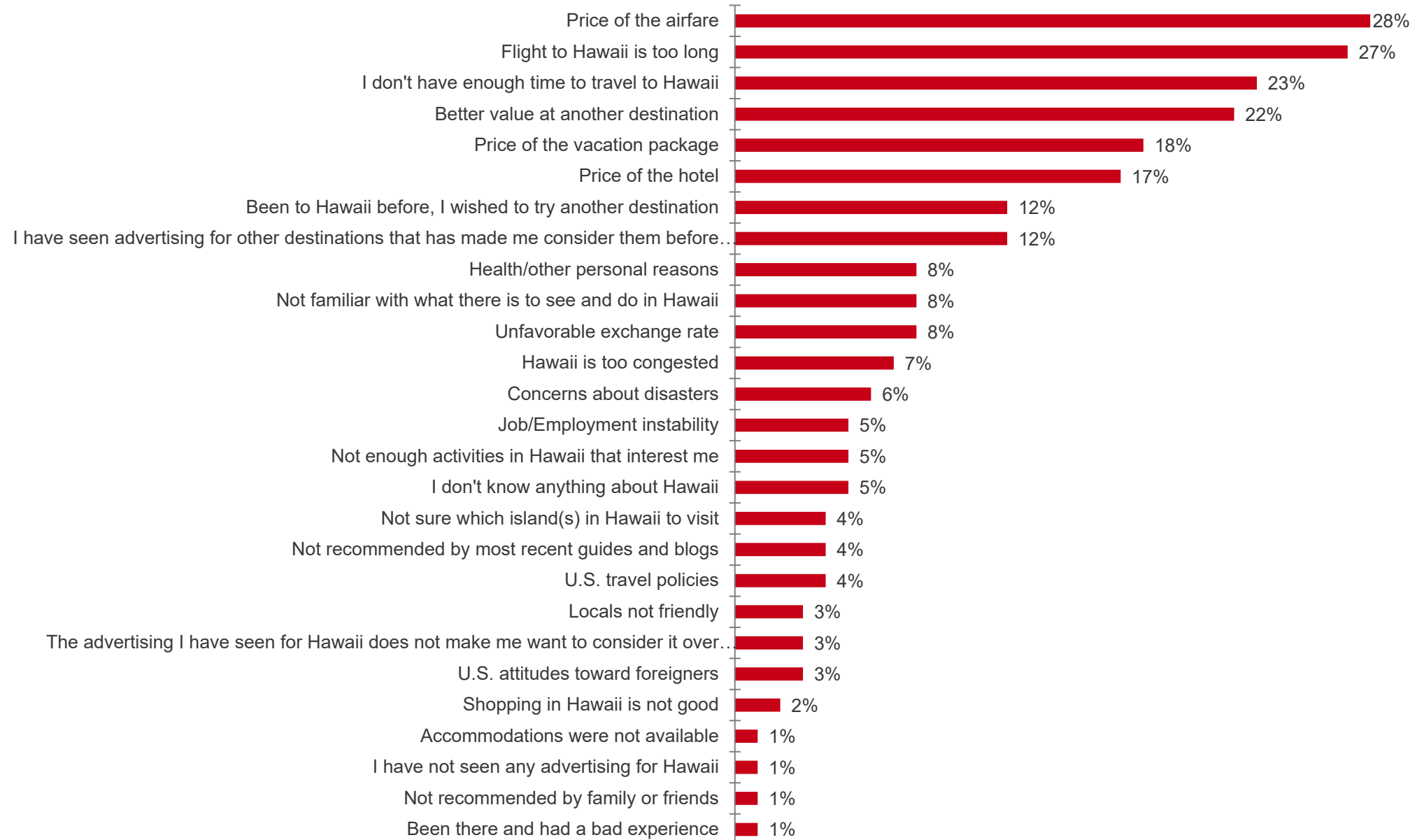
Reasons for Returning to Hawai'i



Hawai'i Planned Accommodations



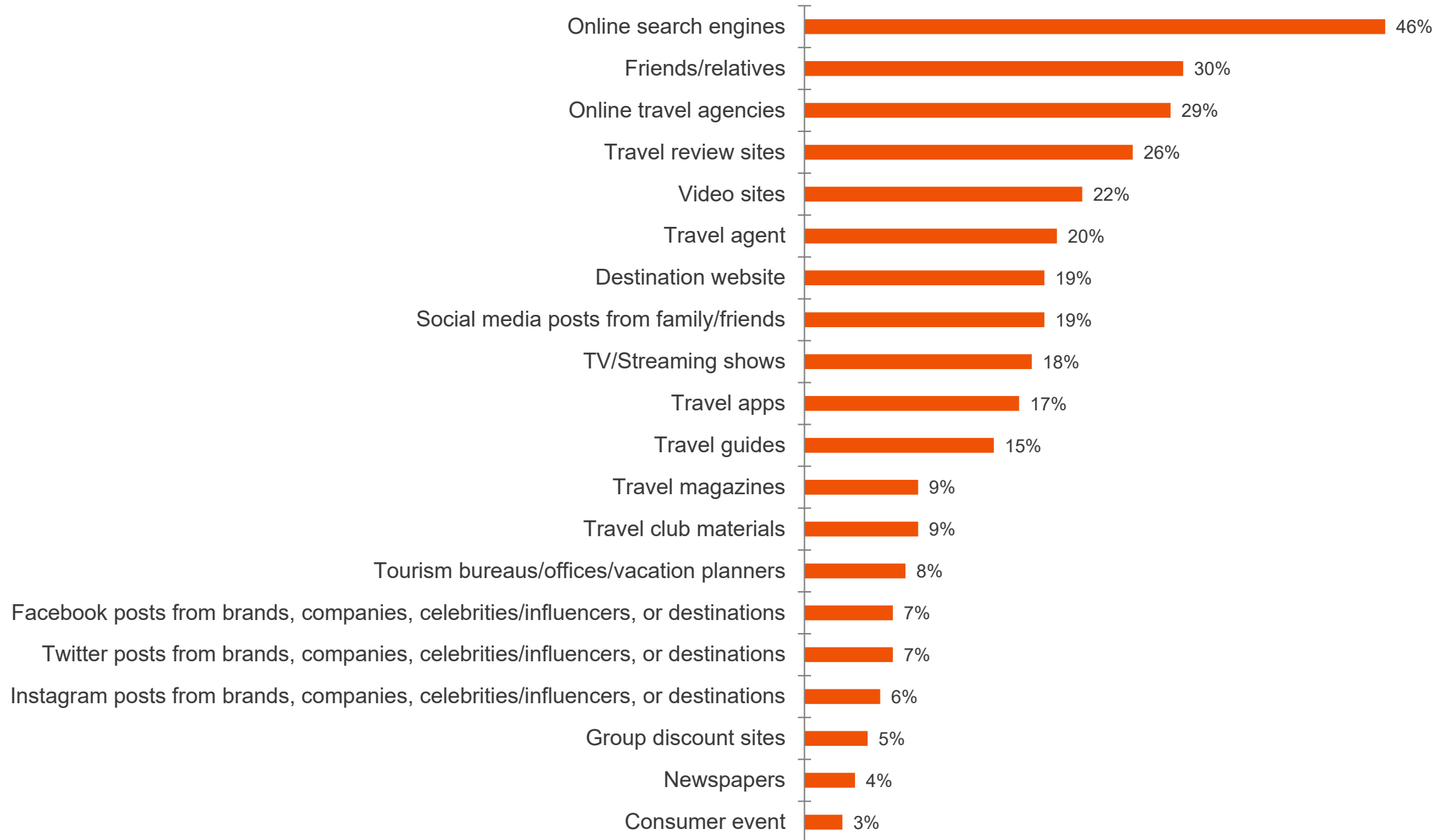
Reasons for Considering but Not Visiting Hawai'i



Travel Inspiration Sources



Travel Planning and Booking Sources



5 Methodology

Methodology

Target Audience/Markets

- Random sample of US, Canada, Japan, and Korea residents
- US: 600 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - US West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - US East includes all continental states not in US West region
- Canada: 600 sample
 - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher
- Japan: 600 sample
 - Traveled internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher (~\$40,000 USD)
- Korea: 600 sample
 - Traveled internationally for leisure in past 24 months with household income of 30,000,000 or higher (~\$26,000 USD)

Timeframe

- Wave 2: Data collection July - August 2019 for media coverage between July – December 2018

Survey Methodology

- Online surveys taken by LSR panelists
- Paid media consumption measured through recognition of ads via TV/video, untagged digital, and social media
- Owned media recognition of Hawai'i channels, including website, YouTube, Facebook, or Instagram
- Earned media recall of articles and stories

Demographics by Market

	US West	US East	US Total
<i>Base:</i>	600	600	1,200
Gender			
Male	50%	46%	48%
Female	50%	54%	52%
Marital Status			
Single	14%	11%	13%
Married	63%	72%	67%
Employment			
Full Time Employed	65%	59%	62%
Retired	16%	22%	19%
Education Level			
Graduated College	78%	80%	79%
Race/Ethnicity			
White	76%	86%	81%
Black/African America	5%	8%	6%
Asian/Pacific Islander	13%	5%	9%
Hispanic/Latino	8%	6%	7%
Children in Household (1+)			
Children at Home	41%	40%	41%
Age			
18-24	10%	2%	6%
25-34	27%	22%	24%
35-44	16%	20%	18%
45-54	20%	16%	18%
55-64	16%	23%	20%
65+	11%	17%	14%
Average	44.0	49.0	46.5
Household Income			
\$75 - \$99,999	29%	36%	32%
\$100 - \$150,000	43%	38%	41%
\$150,000+	29%	26%	27%
Average	\$130,187	\$126,000	\$128,093

Demographics by Market

	Canada
<i>Base:</i>	603
Gender	
Male	59%
Female	41%
Marital Status	
Single	9%
Married	67%
Employment	
Full Time Employed	63%
Retired	25%
Education Level	
Graduated College	81%
Race/Ethnicity	
White	81%
Black/African America	3%
Asian/Pacific Islander	12%
Hispanic/Latino	1%
Children in Household (1+)	
Children at Home	39%
Age	
18-24	1%
25-34	17%
35-44	21%
45-54	19%
55-64	22%
65+	20%
Average	51
Household Income	
\$75 - \$99,999	36%
\$100 - \$150,000	42%
\$150,000+	21%
Average	\$122,947

Demographics by Market

	Japan
<i>Base:</i>	600
Gender	
Male	68%
Female	32%
Marital Status	
Single	31%
Married	63%
Employment	
Full Time Employed	73%
Retired	6%
Education Level	
Graduated College	80%
Children in Household (1+)	
Children at Home	34%
Age	
18-24	2%
25-34	17%
35-44	27%
45-54	23%
55-64	19%
65+	12%
Average	47.2
Household Income	
Under ¥7,000,000	48%
¥7 - ¥9,999,999	27%
¥10 - ¥14,999,999	18%
¥15,000,000+	8%
Average	¥7,882,500

Demographics by Market

	Korea
<i>Base:</i>	602
Gender	
Male	55%
Female	45%
Marital Status	
Single	30%
Married	65%
Employment	
Full Time Employed	75%
Retired	5%
Education Level	
Graduated College	86%
Children in Household (1+)	
Children at Home	43%
Age	
18-24	4%
25-34	30%
35-44	22%
45-54	22%
55-64	17%
65+	5%
Average	42.8
Household Income	
Under ₩80M	68%
₩80M - ₩110M	23%
₩110M - ₩160M	7%
₩160M+	2%
Average	72,900,000 KRW