



# HAWAII MARKETING EFFECTIVENESS

## 2014-2015 – WAVE 1 AND WAVE 2

FINAL REPORT (MAY 2015)

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## TABLE OF CONTENTS

SECTION	PAGE NUMBER
PURPOSE AND METHODOLOGY	3
REPORT STRUCTURE	8
EXECUTIVE SUMMARY	10
CHARTS - SUMMARY – ALL MARKETS	13
CHARTS - EASTERN U.S. MARKET	43
CHARTS - WESTERN U.S. MARKET	122
CHARTS - CANADIAN MARKET	201
CHARTS - JAPANESE MARKET	279

## RESEARCH OBJECTIVES

The purpose of this study is to measure and evaluate the effectiveness of the marketing efforts conducted by marketing concerns under contract with the Hawai'i Tourism Authority.

This study, conducted since 2003, provides insight into the overall intention to travel to Hawai'i, brand valuation, and measurement of specific, separate attributes for Hawai'i's major marketing areas of U.S. West, U.S. East, Canada and Japan.

The major goals of this study are to understand:

- Consideration of Hawai'i as a destination
- Importance of key attributes
- Preference for Hawai'i
- Preference for Hawai'i by behavioral segments
- Opinions of Hawai'i vs. Competitive destinations for each major marketing area:
  - Eastern U.S. (Florida, Costa Rica, Puerto Rico, California, Mexico, Caribbean, Las Vegas and Europe)
  - Western U.S. (Alaska, Costa Rica, Australia, Mexico, Caribbean, Las Vegas and Europe)
  - Canada (Florida, Arizona, Australia, California, Mexico, Caribbean, Las Vegas and Europe)
  - Japan (Australia, China, Guam/Saipan, and Korea)

In addition, the study tracks data on the topics as well:

- Intention to/or actual visits to Hawai'i
- Hawai'i travel patterns and visitor profiles (Accommodations, Length of Stay, Frequency, Satisfaction)
- Indication of reasons for not intending/considering Hawai'i

## RESEARCH OBJECTIVES

Two online surveys of approximately 15 minutes in length were conducted between October 27, 2014 and November 3, 2014 and again between March 23, 2015 and March 27, 2015. Each survey was presented in the language of the surveyed country or was localized, if necessary, for countries where English is the primary language.

Qualified respondents from each major marketing area were required to meet specific requirements for inclusion in this study:

- Eastern U.S.
  - Live in the states of North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Texas, Minnesota, Iowa, Missouri, Arkansas, Louisiana, Wisconsin, Illinois, Tennessee, Mississippi, Michigan, Indiana, Kentucky, Alabama, Ohio, West Virginia, Georgia, Florida, Pennsylvania, Virginia, North Carolina, South Carolina, New York, Vermont, New Hampshire, Maine, Massachusetts, Rhode Island, Connecticut, New Jersey, Delaware, Maryland, Washington, D.C.
  - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
  - Household income of USD \$75,000 or more
  - 18 years of age or older
  
- Western U.S.
  - Live in the states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming
  - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
  - Household income of USD \$75,000 or more
  - 18 years of age or older

## RESEARCH OBJECTIVES

- Canada
  - Live in the provinces of British Columbia, Alberta and Saskatchewan
  - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
  - Household income of CDN \$75,000 or more
  - 18 years of age or older
  
- Japan
  - Live in Japan
  - Have taken and international Leisure trip in the past 24 months
  - Household income of ¥2,000,000
  - 18 years of age or older

Respondents who indicated they intend to travel to Hawai'i within then next 24 months will be re-contacted in November 2016 and March 2017 to determine if a trip was actually made. Actual re-contacts may be lower than reported here due to attrition in the panel.

Respondents are as follows:

Marketing Area	Wave 1 (NOV 2014) Completes	Wave 1 Re-contact in November 2016	Wave 2 (MAR 2015) Completes	Wave 2 Re-contact in March 2017
Eastern U.S.	604	144	601	154
Western U.S.	604	311	616	324
Canada	608	317	608	259
Japan	603	274	603	277

## RESEARCH OBJECTIVES

For some analyses respondents are segmented depending on how they responded to questions regarding the importance of certain destination characteristics they consider when making travel decisions and in particular whether they would attribute that characteristic to Hawai'i. Following are the definitions for each segment. The 'Hawai'i' reference indicates the requirement for the Hawai'i specific segment.

<b>Learning</b> (Hawai'i selected for 4+ factors)	<b>Pleasant Environment</b> (Hawai'i selected for 4+ factors)	<b>Romantic</b> (Hawai'i selected)	<b>Family</b> (Hawai'i selected)	<b>Culinary/Dining</b> (Hawai'i selected)	<b>Language</b> <i>(Japan Only)</i> (Hawai'i selected)
It has unique scenery unlike anywhere else	It is a good place to get away from it all	It is romantic	It is a good place for family and children	It offers quality culinary and dining experiences	It is easy to communicate in my native language
There are many historic and cultural things to see and do	The environment is clean				
Offers authentic experiences	It is a safe and secure place				
It has a variety of unique experiences and activities	It's a good value for the money				
There are always opportunities to discover new activities and experiences that make you want to return again and again	It provides a sense of relaxation, a place to unwind and get re-energized				
It offers a different experience than other places	The local people are friendly				
The history and culture are intriguing	It is easy to get there				
	It is easy to navigate and get around				
	It is a good place for shopping <i>(Japan Only)</i>				

## RESEARCH OBJECTIVES

Inclusion in each segment is based on the responses for each attribute within the segment, thus if a respondent has responded to more than one characteristic across multiple segments, thus while the response is counted only once, the respondent may be counted multiple times. Sample sizes for each segment for all respondents as well as only those included in the Hawai'i specific definition are shown in the table below.

All segment data included in this report are based on Hawai'i specific segments only.

Total Wave 1 and Wave 2 counts combined	Eastern U.S.		Western U.S.		Canada		Japan	
	General Destination	Hawai'i Specific	General Destination	Hawai'i Specific	General Destination	Hawai'i Specific	General Destination	Hawai'i Specific
Learning	870	534	931	564	862	495	895	416
Pleasing Environment	985	733	973	939	986	849	986	798
Romantic	457	728	439	823	410	723	587	628
Family	520	477	461	850	462	674	677	756
Culinary/Dining	758	727	781	531	717	478	823	557
Language (Japan Only)							474	813

Data will be presented in five major sections. The first section includes a Summary of Wave 1 (NOV 2014) and Wave 2 (MAR 2015) data combined, comparing relevant data from each of the four market areas. This will be followed by detailed data for each market area – Eastern U.S., Western U.S., Canada and Japan showing each wave separately as well as in total. The exact wording of the survey question used to compile each chart is included at the bottom of each chart within the individual market area sections.

Excluding the Summary section, charts in each set of the market sections appear in the identical order. Since the Summary section includes only data that can be compared across all markets, some charts have been excluded; the progression, however is maintained. Charts in each market section appear in the following order:

- Demographics – Age
- Demographics – Median Age
- Demographics – Income
- Demographics – Median Income
- Demographics – Long Distance Overnight Trips in Past 12 Months (Past 24 Months for Japan)
- Demographics – Median Number of Long Distance Overnight Trips in Past 12 Months (*Past 24 Months for Japan*)
- Destination Consideration for Next Leisure Vacation
- Reasons for Taking a Leisure Vacation
- Attributes Important in Choosing a Destination
- Attributes Important in Choosing a Destination (Importance vs. Applies to Hawai'i)
- Destination Attributes – Competitive Comparisons (*competitive destinations vary by market*)
- Destination Attributes – Competitive Comparisons (point differences)
- Impression of Hawai'i



- Impression of Hawaii by Segment
- Hawai'i Visitation by Segment
- Visitation – Competitive Destinations
- Planned Visitation – Competitive Destinations
- Planned Visitation to Islands of Hawai'i
- Planned Accommodations
- Reasons for Not Visiting Hawai'i
- Lifetime Visits to Hawai'i
- Reasons for Returning to Hawai'i
- Reasons for Returning to Hawai'i – Segment Comparisons
- Year Last Visited Hawai'i
- Month Last Visited Hawai'i
- Islands' Share of Nights in Hawai'i
- Nights in Hawai'i
- Average Spending in Hawai'i
- Travel Party Size
- Hawai'i Excellent Rating
- Likelihood of Returning to Hawai'i

## HIGHLIGHTS

- With an average age of 47, Canadian travelers are the oldest and at 43, Western U.S. travelers are the youngest. Eastern U.S. and Japanese travelers are similarly aged at 45 years.
- Travelers to Hawai'i from all markets tend to be more affluent as their average annual household incomes exceed the national averages in each of their respective countries.
- Although the percentage is low, LGBT travelers are twice as likely to come from the Eastern U.S. than from any of the other geographies.
- All travelers in this study claim to have taken at least 2 long distance overnight trips in the past 12 months.
- Hawai'i is at the top of the consideration list for both Western U.S. and Canadian travelers. Hawai'i is number two behind Europe on the consideration list for Japan and number five among Eastern U.S. travelers behind Florida, the Caribbean, California and Las Vegas.
- At least 8 out of 10 U.S. and Canadian travelers say that the most important reasons for taking a leisure trip are to see and do new things and have new or different experiences as well as to have a chance to relax and get rid of stress. The same number of Japanese travelers travel to renew their minds, bodies and souls.
- Among the 18 attributes (20 for the Japan market) important in choosing a leisure destination, Hawai'i meets or exceeds expectations among all visitors as being romantic and additionally among Western U.S. and Canadian visitors as a good place for family and children; and among Japanese visitors as a good place for family and children, a great place for shopping and ease of communicating in the travelers native language. Although Hawai'i is rated very highly as a romantic destination, the fact that a destination is romantic is low on the list of attributes for choosing a destination.
- While there is variance among the markets, most have the impression that Hawai'i is able to deliver high levels of relaxation and romance, recreational activities (including water sports, zip lining, snorkeling, hiking, biking, etc.), family friendly activities and State or National parks and beaches. Shopping is also rated highly among the Japanese market.

## HIGHLIGHTS

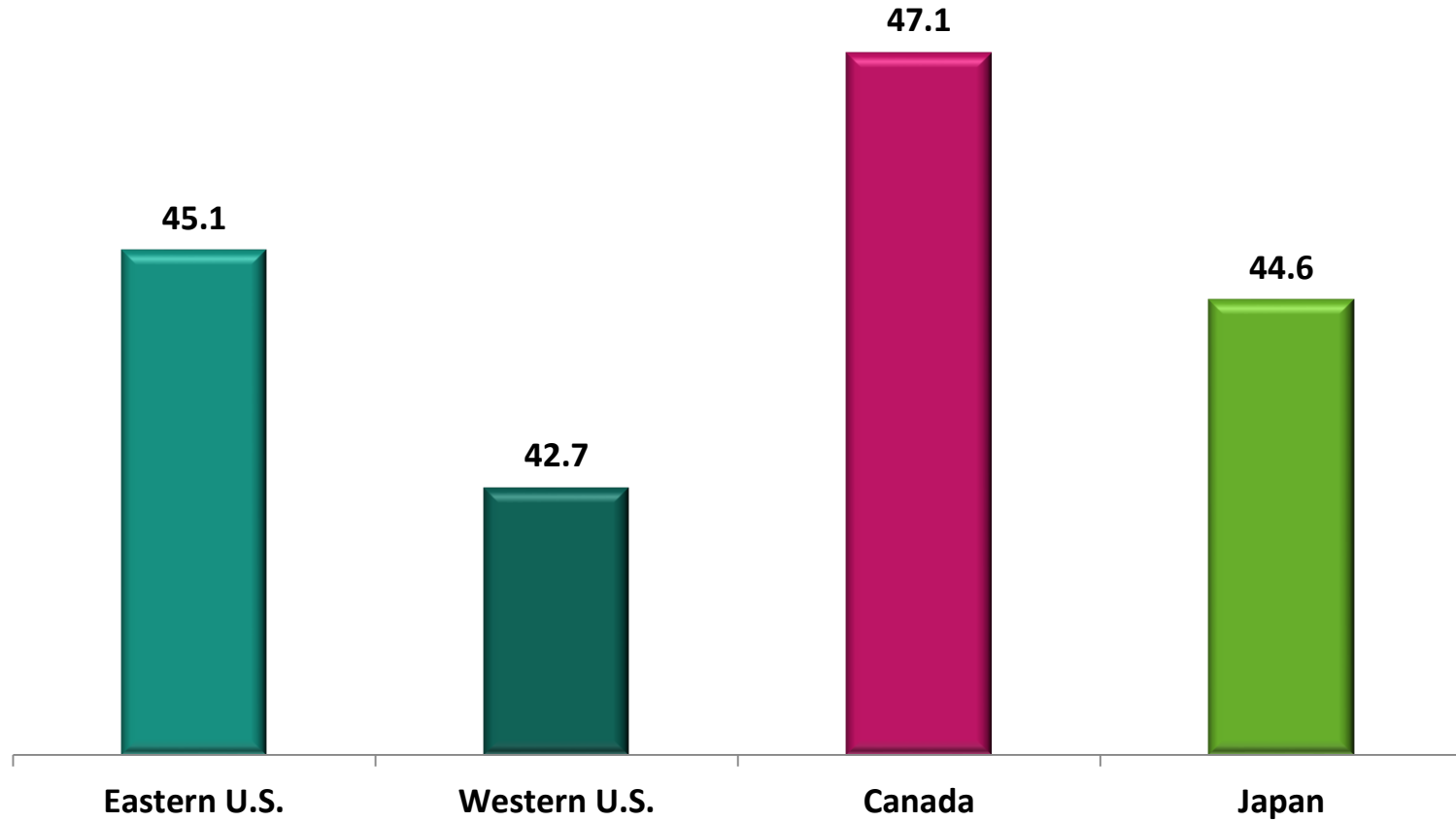
- Between 20% and 25% of visitors from all markets, excluding the Eastern U.S., have visited Hawai'i in the past 12 months with an additional 15% to 20% visiting in the past 24-36 months. Less than 10% of Eastern U.S. visitors have visited in the past 12 months with an additional 14% visiting the past 24-36 months.
- U.S. visitors, are most likely to visit Hawai'i in the Summer, while Canadians are least likely to visit in the Summer and overwhelmingly prefer Winter. Visitors from seem to prefer Summer and Spring.
- More than 3 out of 10 visitors from the Western U.S, Canada and Japan plan to visit Hawai'i in the next 12 months with an additional 15% - 20% planning to visit in the next 13-24 months. Only about 25% of Eastern U.S. visitors plan to visit in the next 24 months and about half of those plan to do so in the next 12 months. The primary reason Eastern U.S. visitors seem to be lagging behind the other markets is the cost of airfare and hotels as well as the time a trip to Hawai'i from the Eastern U.S. requires. They feel they can get a better value at other destinations. This is also true among Canadians who consider Hawai'i as a leisure destination, but have not made any plans to travel there.
- Among those who are planning to visit the State, Maui is on the top of the list, except for Japanese visitors who overwhelmingly plan to visit Oahu. This is likely due to their high opinions of the shopping in Hawai'i. Oahu is definitely second for the U.S. and Canadian visitors. An opportunity exists to lure those planning to visit Hawai'i to islands other than Oahu and Maui as almost 30% of U.S. and Canadian travelers have not yet decided which islands they plan to visit on their next trip.
- Visitors from all markets primarily plan to stay in a hotel. Visitors from Canada, however are the least likely travelers to stay in a hotel and the most likely to stay in a condo. In fact Canadians stay in condos more than they stay in any other type of accommodation in Hawai'i. It is not surprising that the majority of all traveler groups plan to stay at a resort location, although between 20% and 30% have not yet decided in what type of location they will stay on their planned trip to Hawai'i. Japanese visitors seem to be the most diverse with many planning to stay in urban, rural and suburban locations.

## HIGHLIGHTS

- As might be expected, at about five visits, visitors from the Western U.S. have made the most lifetime visits to Hawai'i, followed by Canadian visitors also at about five lifetime visits and Japanese visitors at about four. Visitors from the Eastern U.S. have only made between two and three visits to Hawai'i in their lifetimes.
- Visitors from all four markets keep returning to Hawai'i because of its stunning natural beauty, the great weather and great beaches. They also feel it is safe and they love to experience the culture.
- At about \$4,500, visitors from the Eastern U.S. and from Japan spent the most on their last trip to Hawai'i. Having the largest travel parties may be the reason for the high spending among Eastern U.S. visitors, but for Japanese visitors, it seems to be the shopping with almost 20% of their travel dollar having been spent in Hawai'i's shops. Canadians come in third in spending at about \$4,100, which is likely due to their longer length of stay – about 13 days. Western U.S. visitors spend the least on transportation and thus spend the least overall - about \$3,300.
- Visitors from all four markets rate their last visit to Hawai'i 6.5 or higher on an excellence scale of 8 and, excluding the Eastern U.S., about one-third say they are very likely to return in the next 24 months. Almost 40% of the Eastern U.S. visitors say they are somewhat or very likely to return to Hawai'i in the next 24 months.

## **SUMMARY - ALL MARKETS**

## DEMOGRAPHICS - AGE



## DEMOGRAPHICS – AVERAGE HOUSEHOLD INCOME

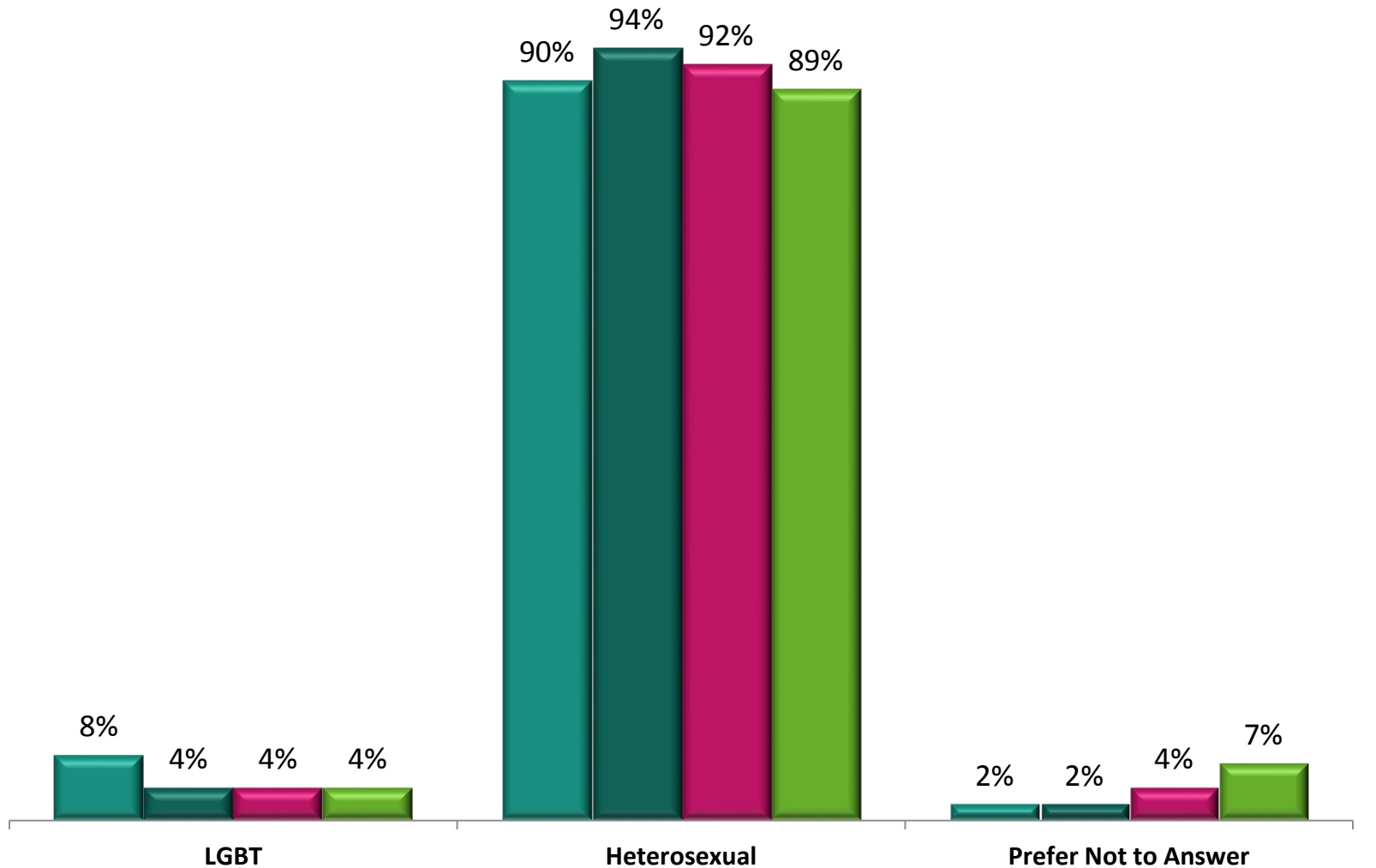
*Respondents were asked to provide Annual Household Income in the currency of their country. Following are the Average Household Incomes of respondents from each region or country.*

- **Eastern U.S.** (U.S. Dollars)                      **\$143,000**
- **Western U.S.** (U.S. Dollars)                      **\$139,000**
- **Canada** (Canadian Dollars)                      **\$134,000**
- **Japan** (Japanese Yen)                              **¥823**

Travelers to Hawai'i tend to be more affluent as their Average Annual Household Incomes exceed the national averages in each of their countries.

## DEMOGRAPHICS – SEXUAL ORIENTATION

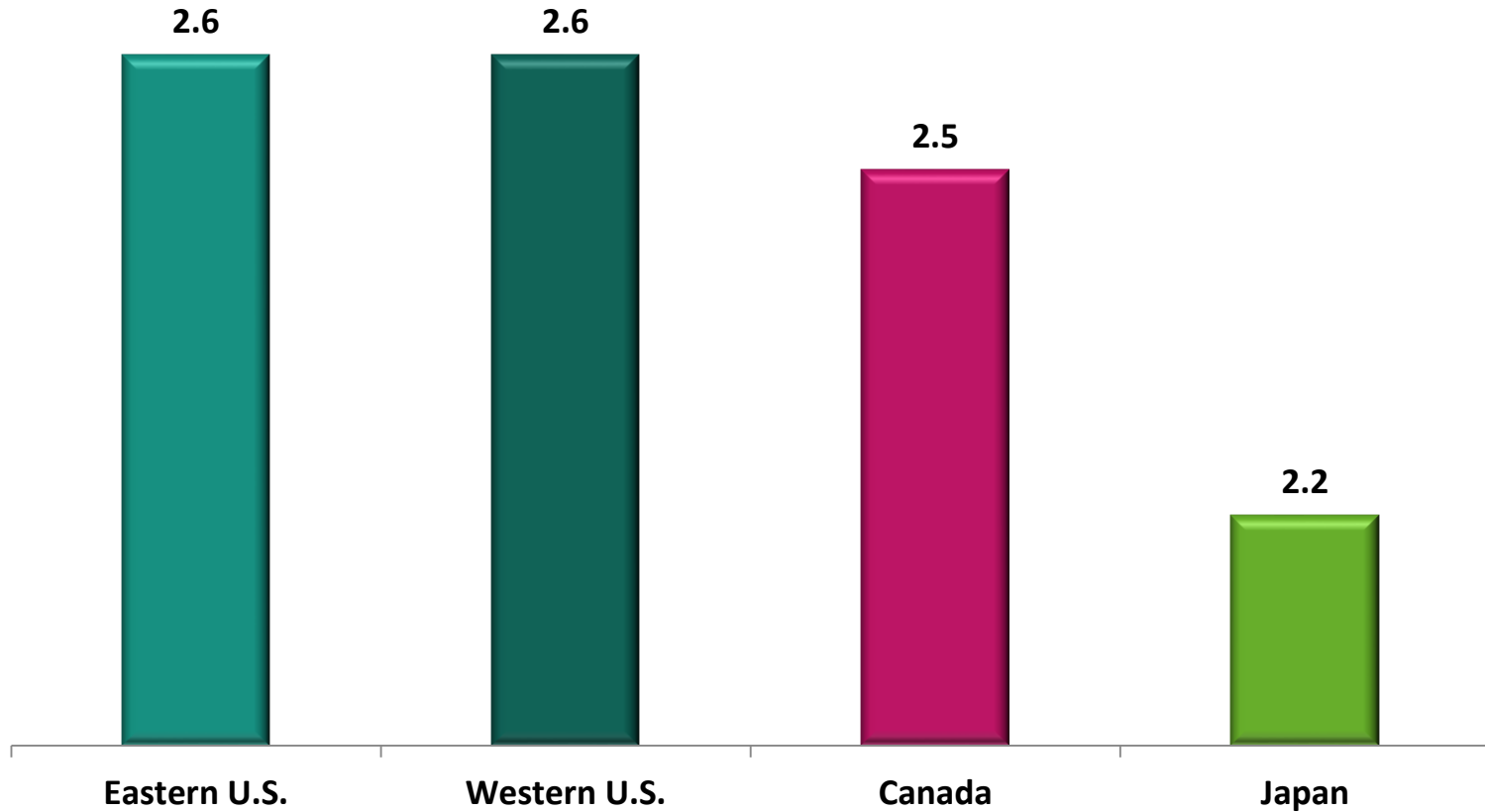
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



QS5. Do you consider yourself to be:  
Note: Question asked in MAR 2015 Only



## DEMOGRAPHICS – AVERAGE NUMBER OF LONG DISTANCE OVERNIGHT TRIPS IN PAST 12 MONTHS



## DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

Eastern U.S.	Western U.S.	Canada	Japan
1. Florida (44%)	<b>1. Hawai'i (45%)</b>	<b>1. Hawai'i (36%)</b>	1. Europe (32%)
2. Caribbean (41%)	2. Other Europe (32%)	2. Europe (35%)	<b>2. Hawai'i (31%)</b>
3. California (36%)	3. Alaska (29%)	3. California (34%)	3. Australia (27%)
4. Las Vegas (26%)	4. Las Vegas (28%)	4. Las Vegas (32%)	4. Taiwan (23%)
5. Other (22%)	5. Italy (27%)	5. Mexico (31%)	5. Singapore (19%)
<b>6. Hawai'i (21%)</b>	6. U.K. (26%)	6. Caribbean (28%)	5. Guam/Saipan (19%)
7. Other Europe (20%)	7. Australia (25%)	7. Other (20%)	6. Korea (18%)
7. U.K. (20%)	7. France (25%)	8. Arizona (18%)	7. Thailand (16%)
7. Italy (20%)	7. Caribbean (25%)	9. Florida (15%)	8. Hong Kong (13%)
8. Mexico (18%)	8. Other (21%)	10. Australia (12%)	9. Other (10%)
9. Costa Rica (14%)	9. Mexico (20%)	No Trip Considered (3%)	10. China (9%)
10. France (13%)	10. Costa Rica (17%)		No Trip Considered (8%)
11. Germany (12%)	11. Germany (15%)		
12. Puerto Rico (11%)	12. Switzerland (8%)		
13. Switzerland (8%)	No Trip Considered (4%)		
No Trip Considered (3%)			

# REASONS FOR TAKING A LEISURE VACATION ANYWHERE (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

ACTIVITY

I can do fun recreational activities



INDEPENDENT

No schedules to meet, I can do what I want, when I want



Have an outdoors adventure to test my physical abilities



I seek solitude and isolation when vacationing



RECONNECT

I can spend more quality time with my spouse/family



I can spend more time with my friends



It's nice to have others serve/wait on me



# REASONS FOR TAKING A LEISURE VACATION ANYWHERE (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

EXPERIENCE/  
LEARN

I can see and do new things, have new/different experiences



I like to learn new things



I like to experience authentic local culture



I gain knowledge of history or other cultures



REVITALIZE

It's a great chance to relax, get rid of stress



Renews my mind, body and soul



Vacations enrich my perspective on life



I feel alive and energetic when I travel

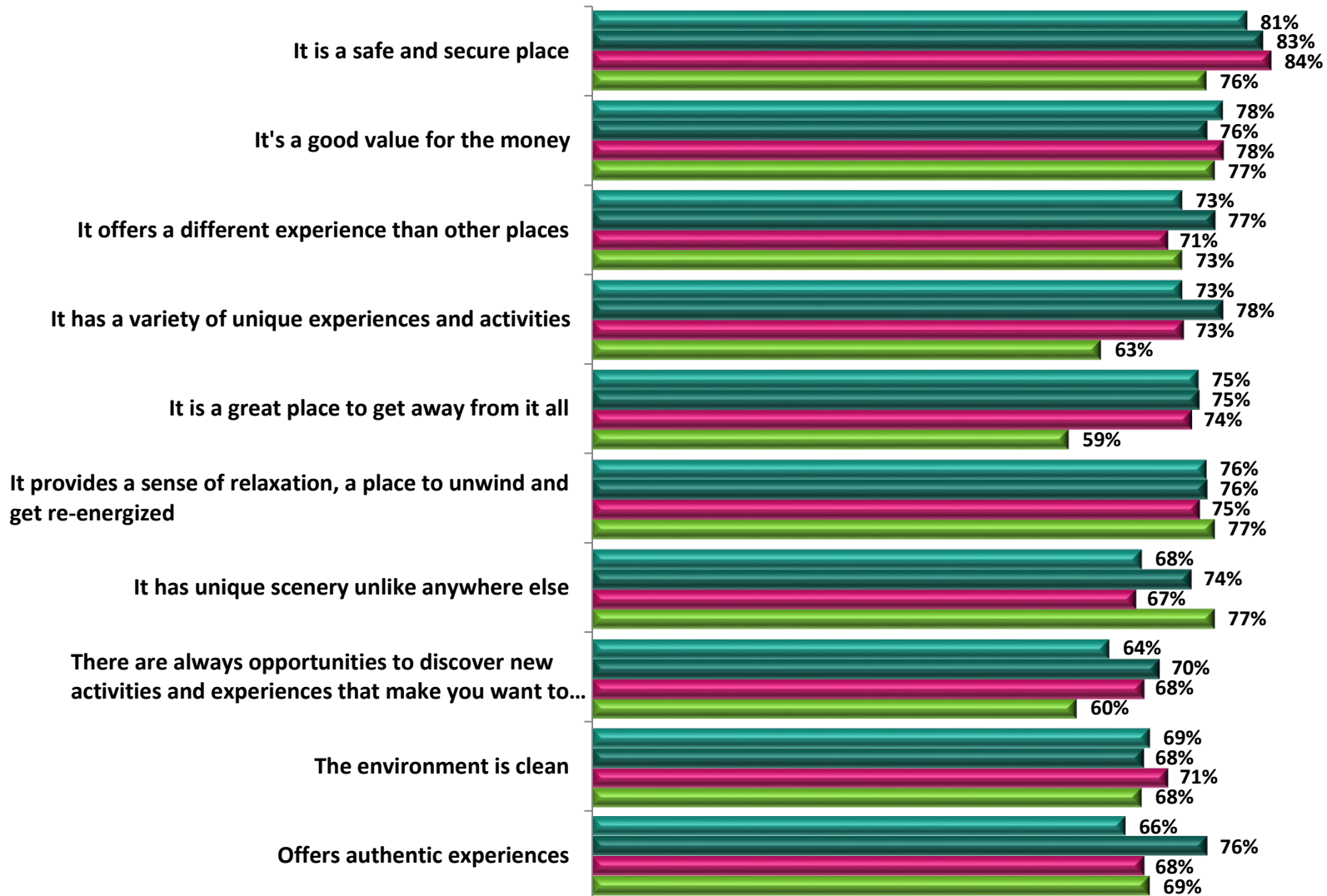


Travel is an important part of my life



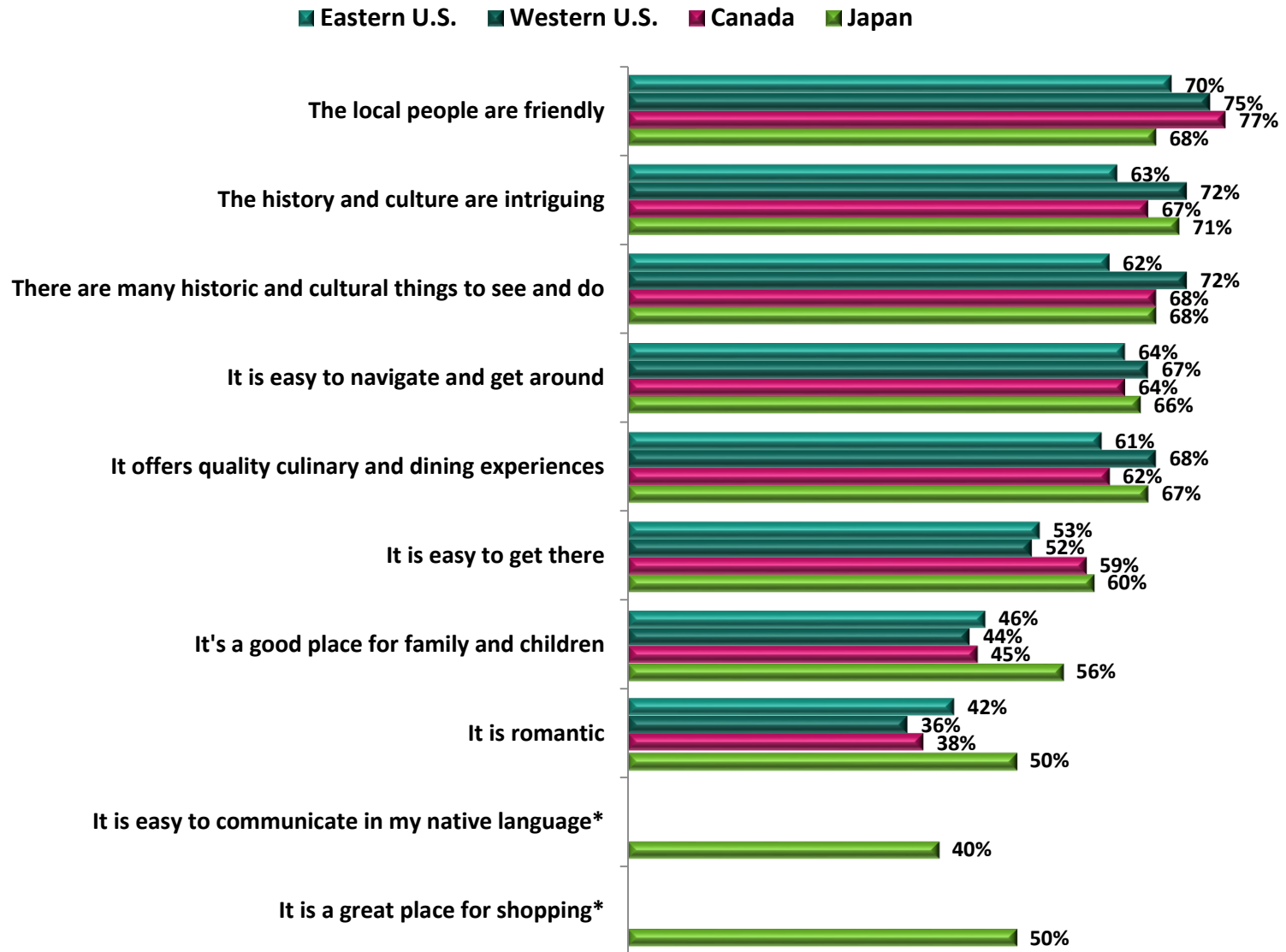
# ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



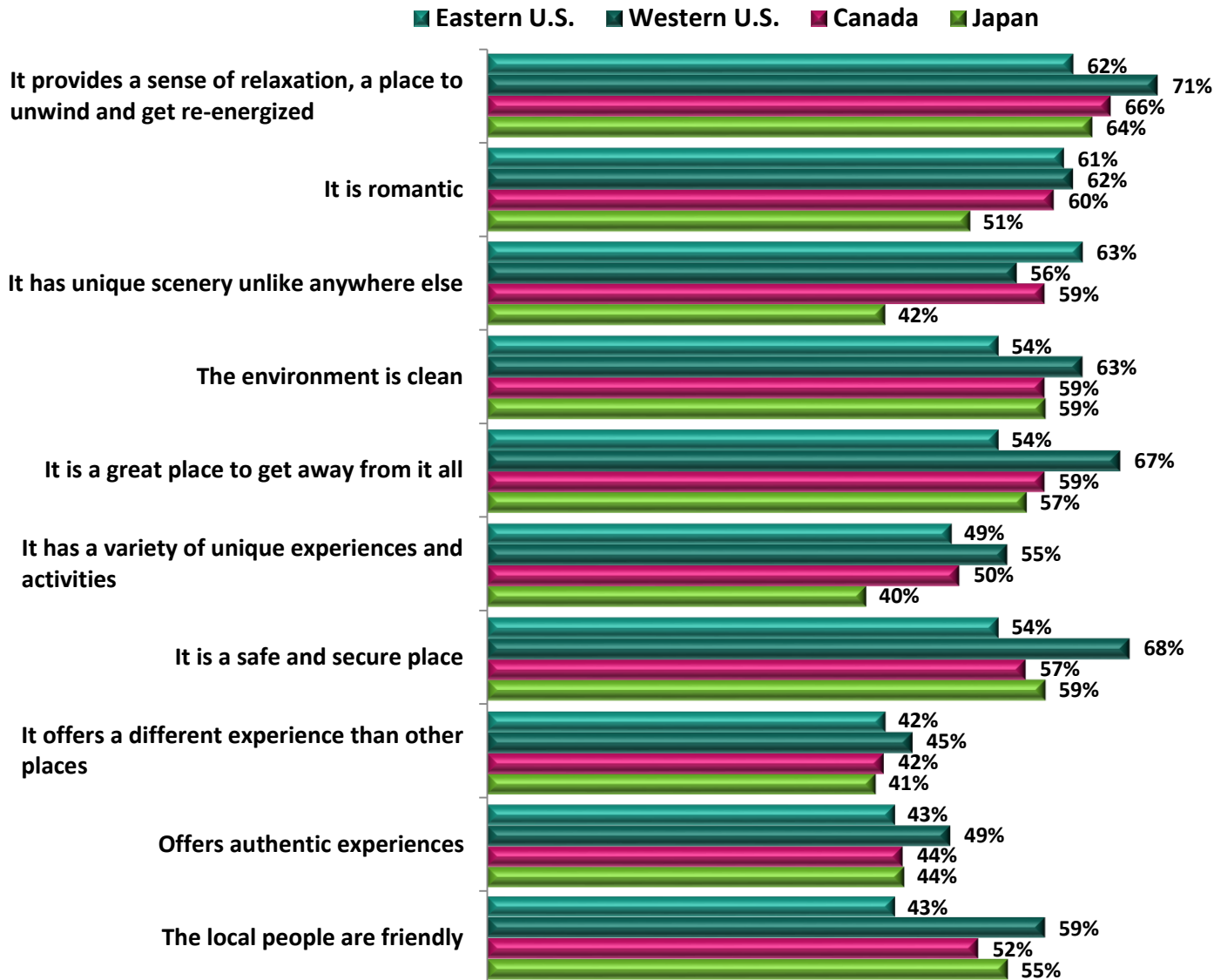
\* Only asked of the Japanese Market

# ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



\* Only asked of the Japanese Market

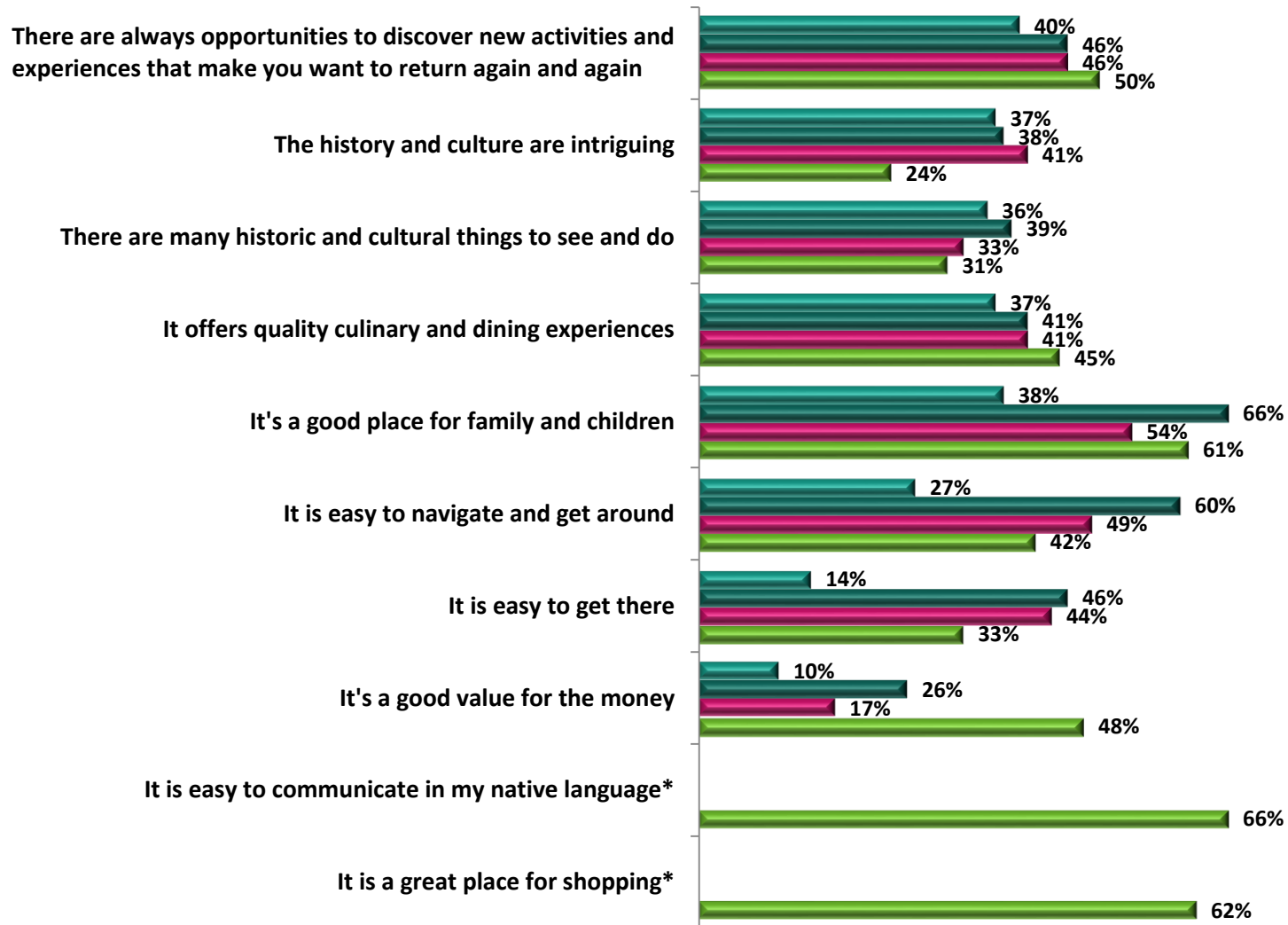
# HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)



\* Only asked of the Japanese Market

# HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

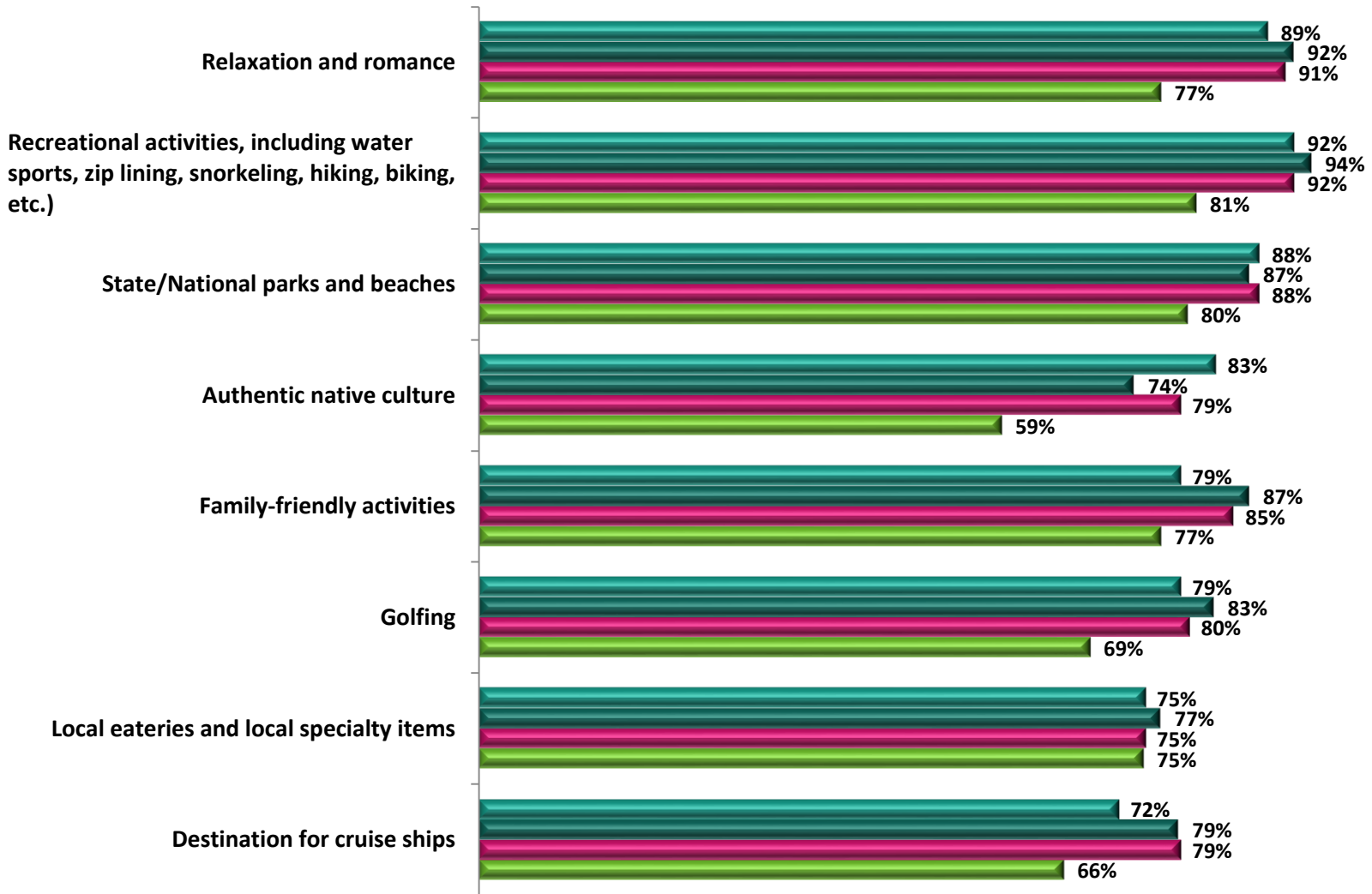


\* Only asked of the Japanese Market



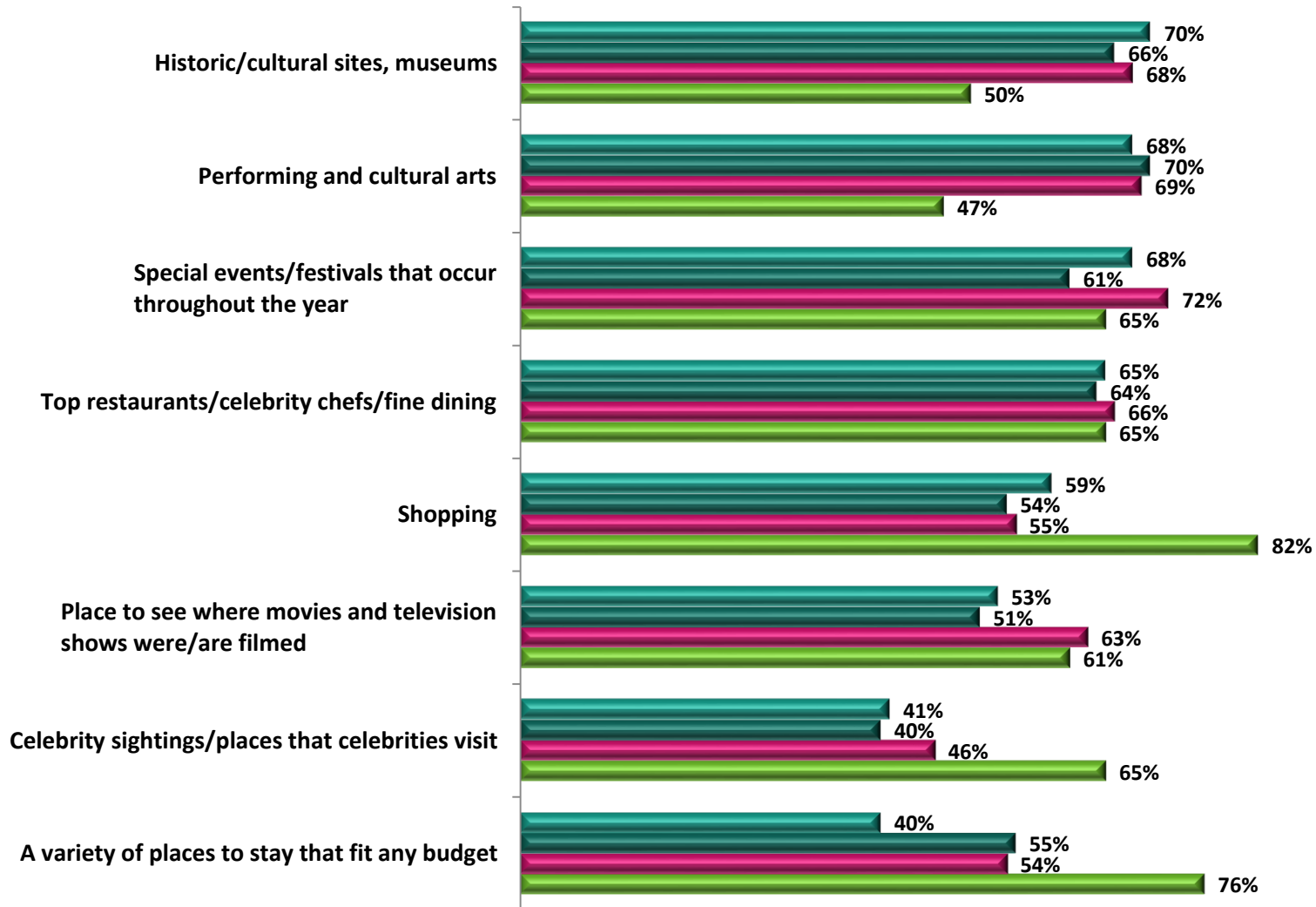
# IMPRESSION OF HAWAII' I (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



# IMPRESSION OF HAWAI'I (CONT.) (% TOP 2 BOX)

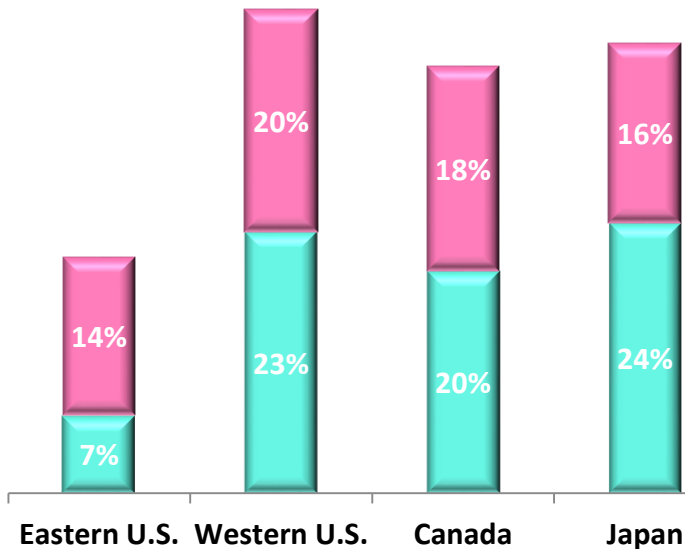
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



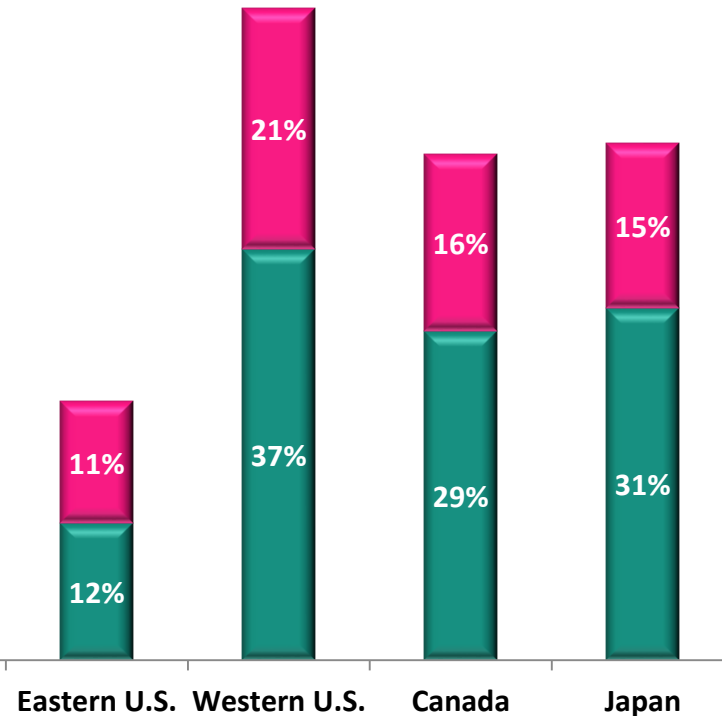
# HAWAII VISITATION FREQUENCY

- Visited Past 12 Months
- Visited Past 13-36
- Plan to Visit Next 12 Months
- Plan to Visit Next 13-24 Months

## Visited Past 36 Months

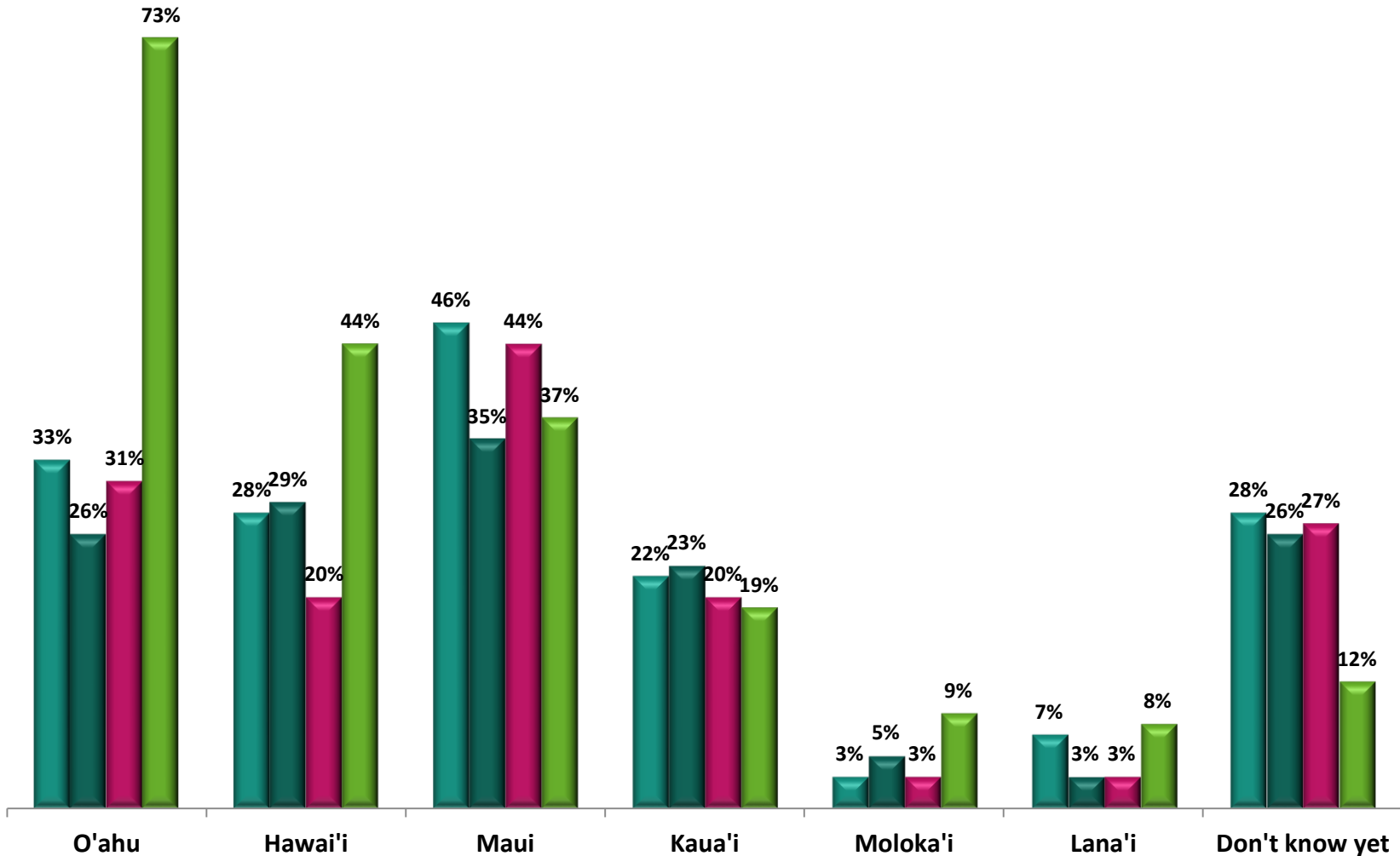


## Plan to Visit Next 24 Months



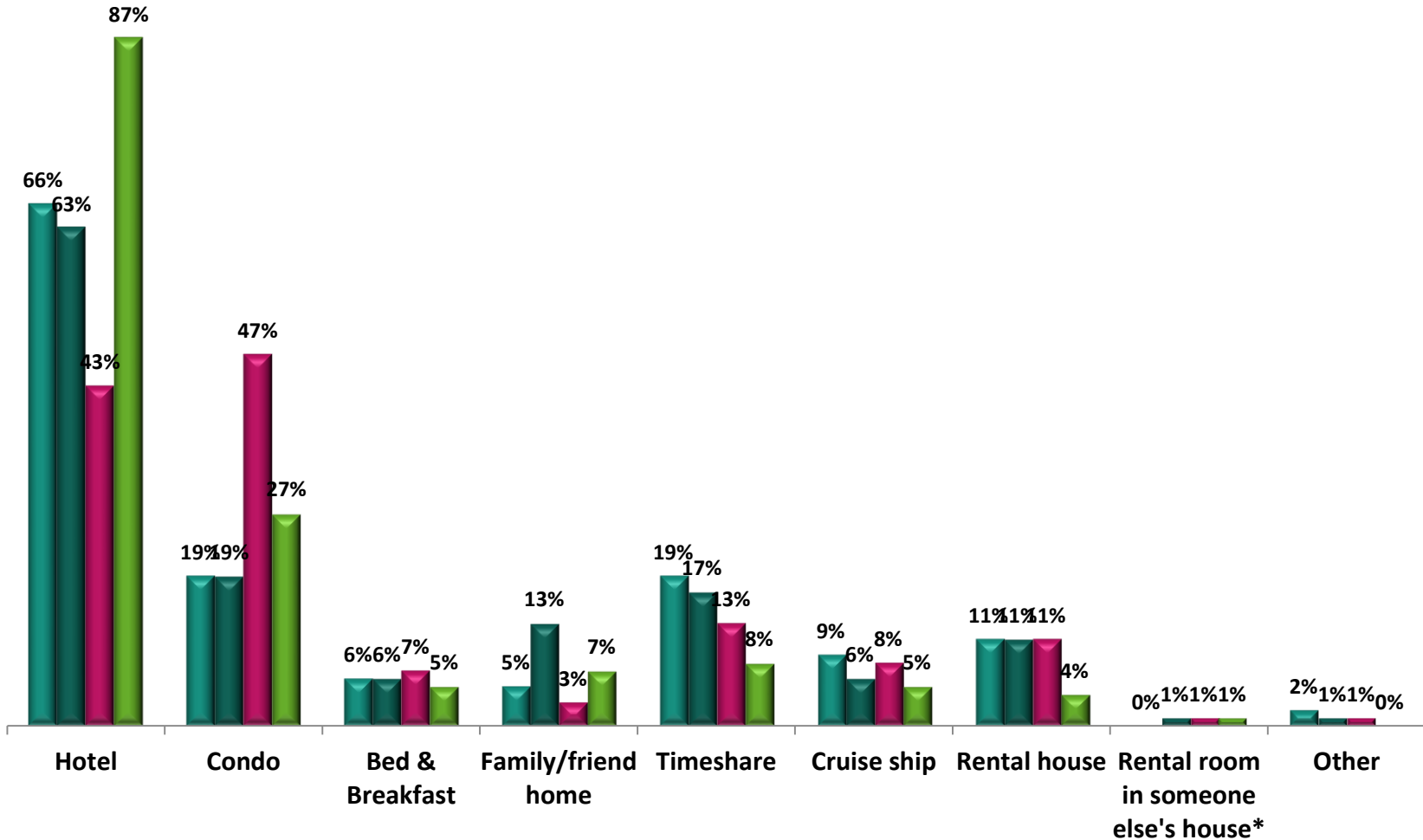
# PLANNED VISITATION TO ISLANDS OF HAWAI'I (AMONG THOSE PLANNING TO VISIT IN NEXT 24 MONTHS)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



# PLANNED ACCOMMODATIONS (AMONG THOSE PLANNING TO VISIT HAWAI'I IN NEXT 24 MONTHS)

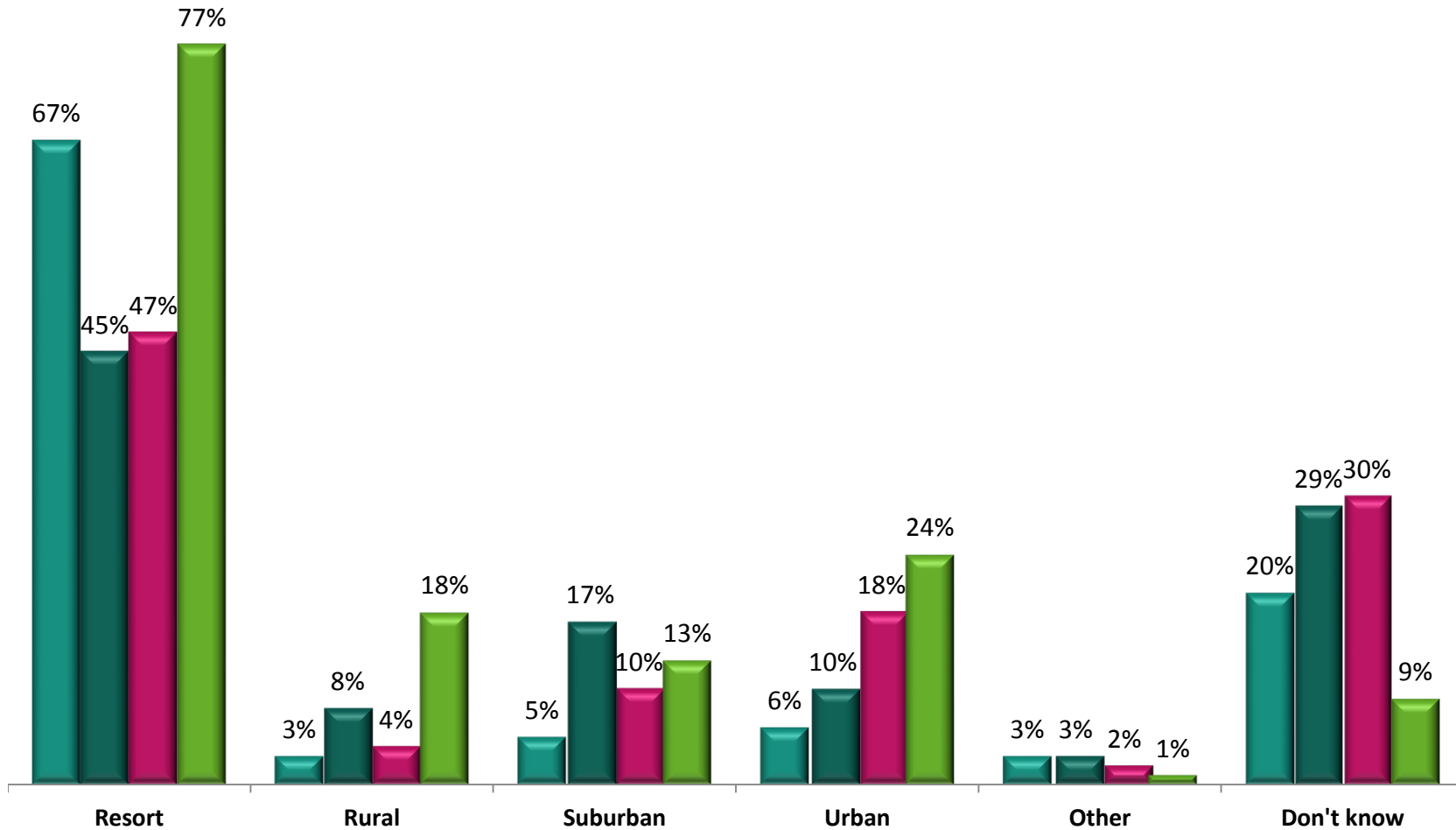
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



\* Asked in MAR 2015 only

## PLANNED ACCOMMODATION LOCATION (AMONG THOSE PLANNING TO VISIT HAWAI'I IN NEXT 24 MONTHS)

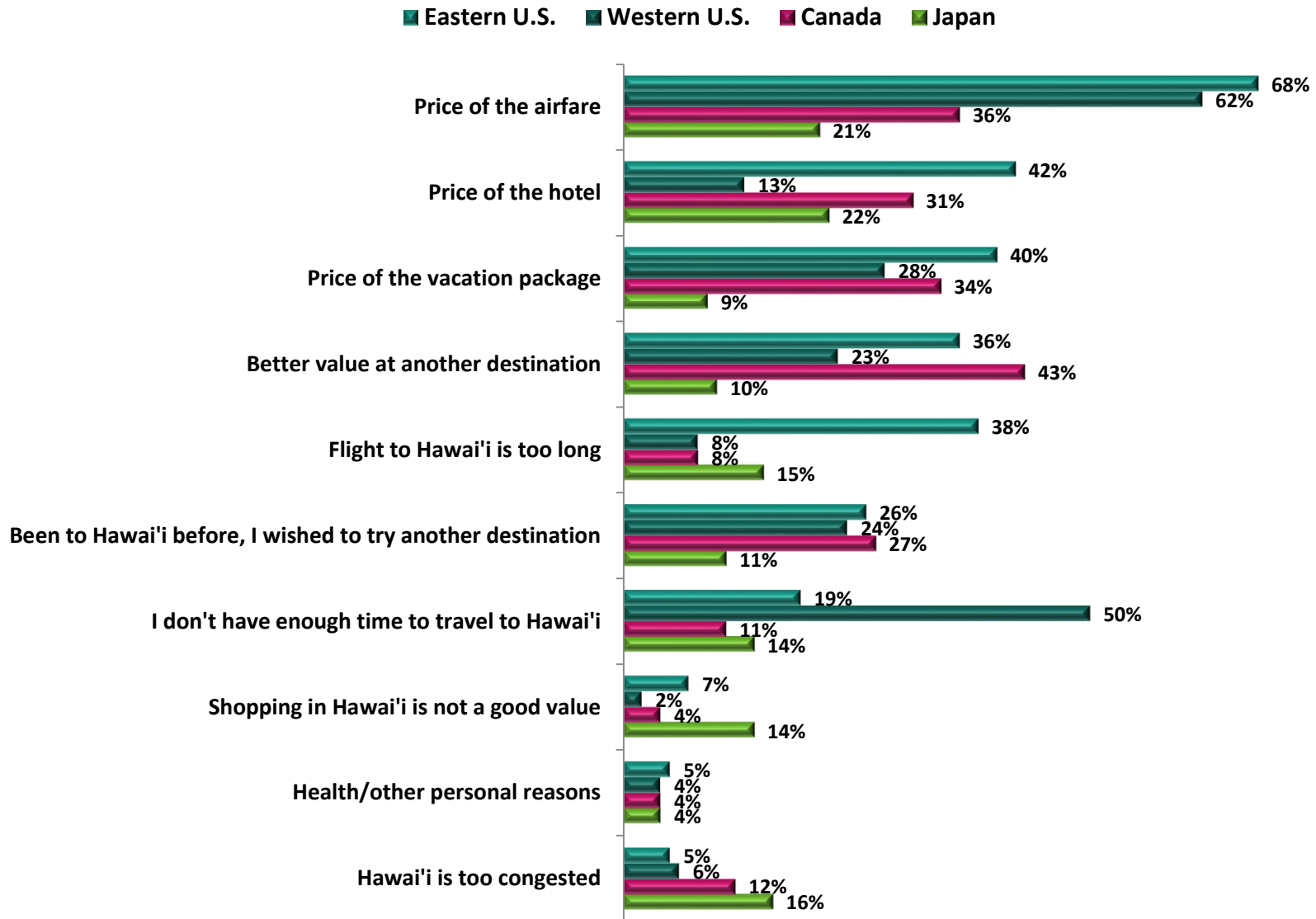
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q9E. You indicated that you are planning to visit Hawai'i in the next 24 months. What type of area do you plan to stay in?

Note: Question not asked in NOV 2014

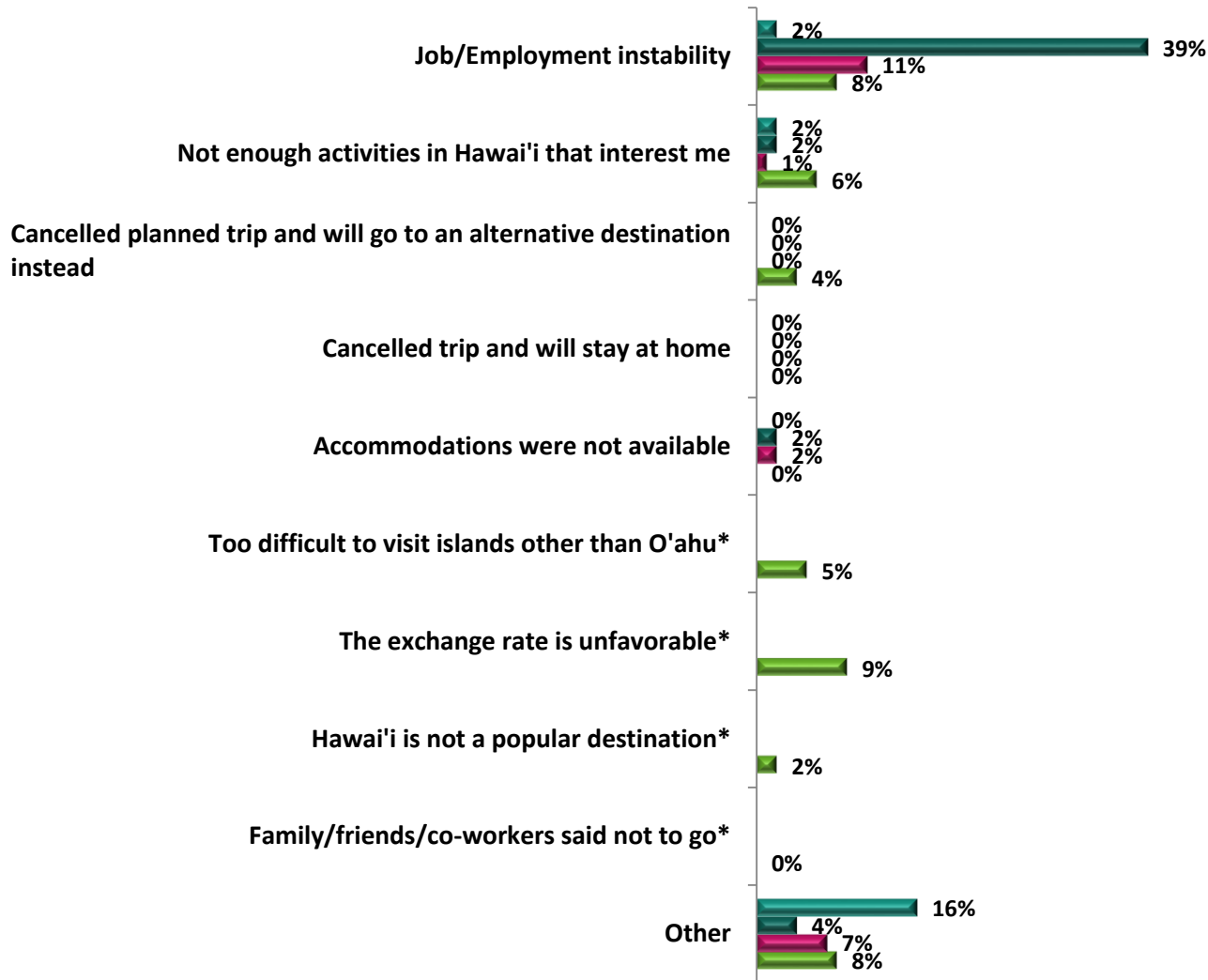
# REASONS FOR NOT VISITING HAWAI'I (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)



Note: Sample sizes for this question are very small; use data with proper caution

# REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

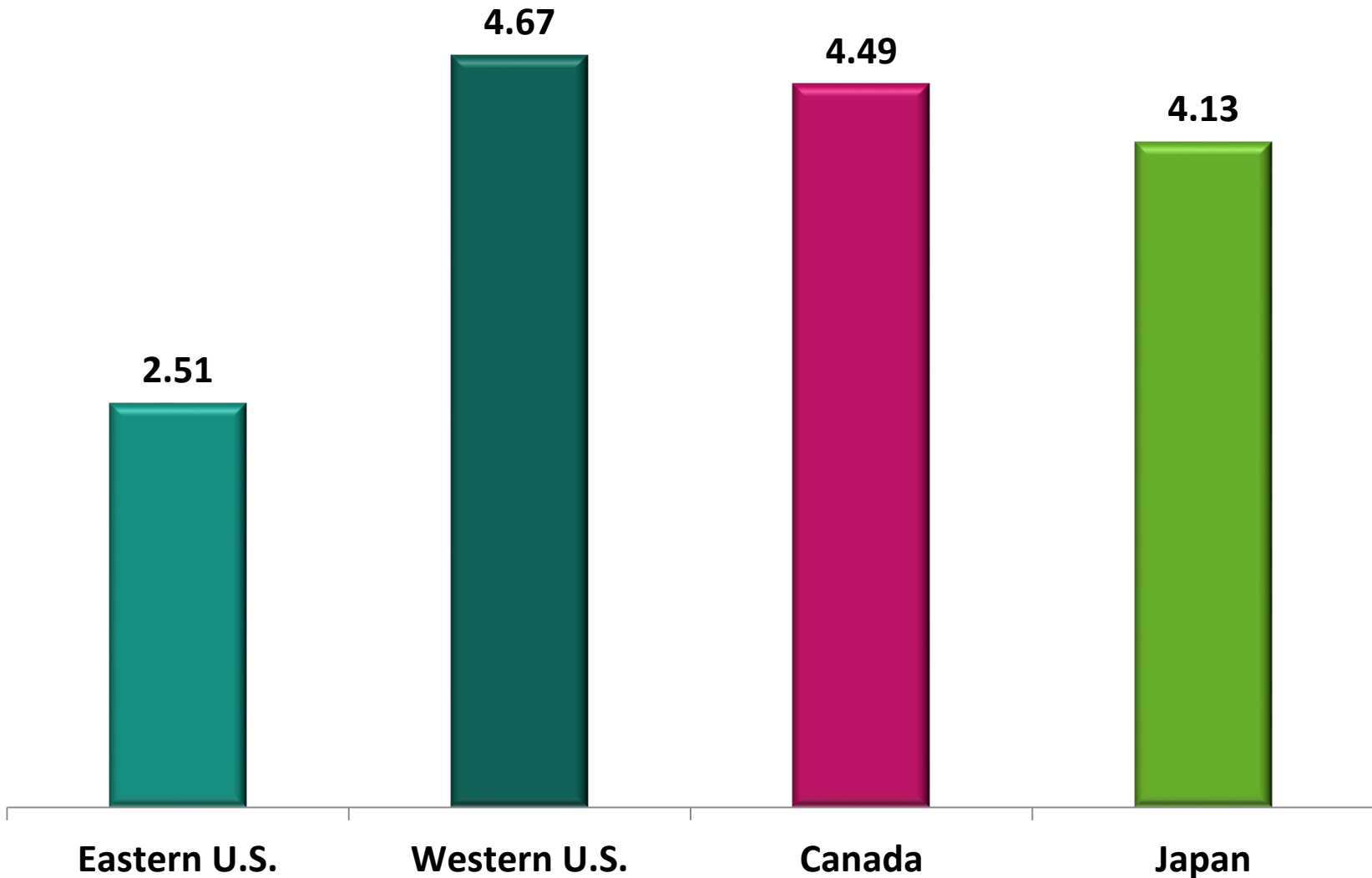


\* Only asked of the Japanese Market

Note: Sample sizes for this question are very small; use data with proper caution

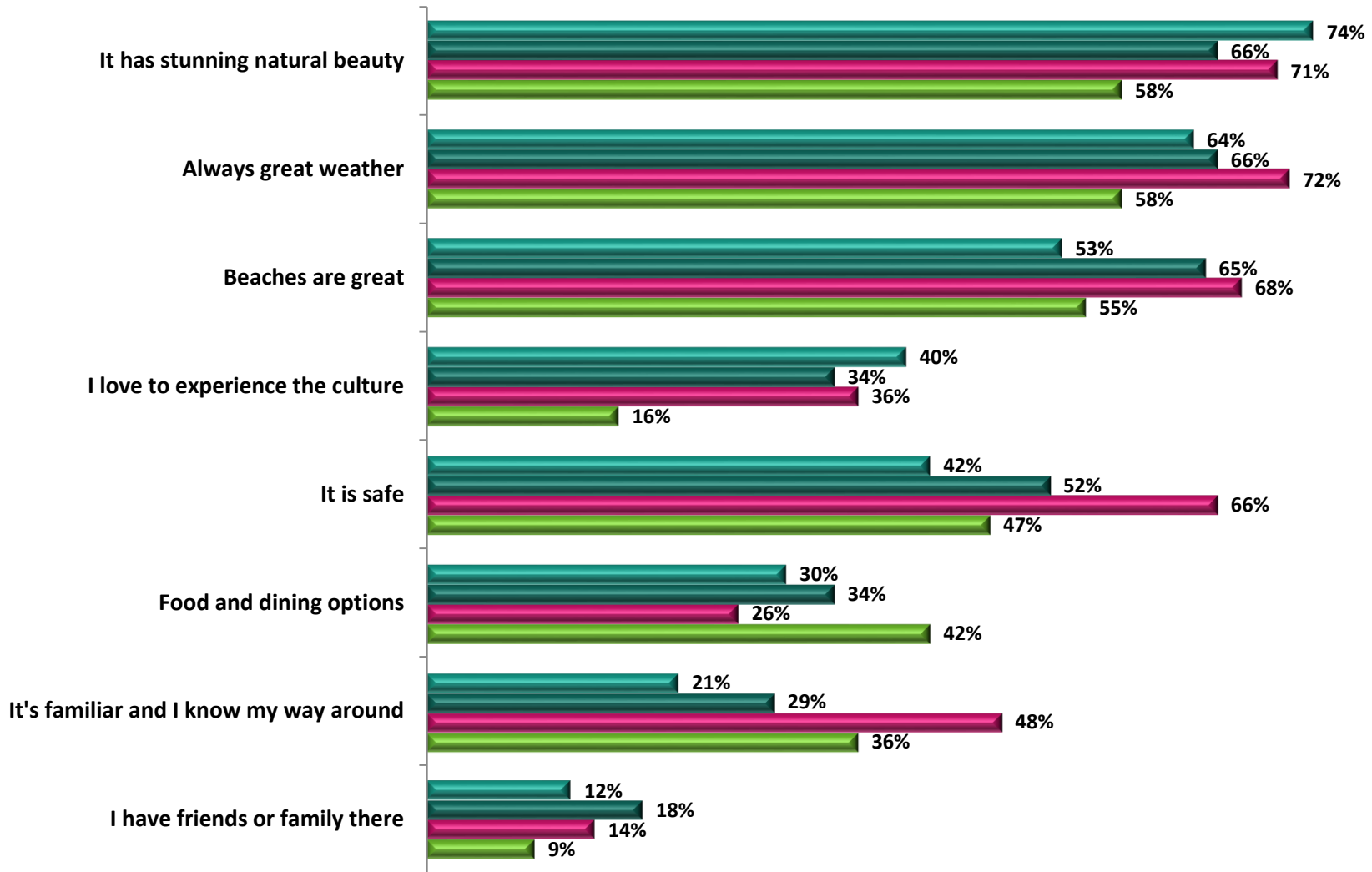


## AVERAGE LIFETIME VISITS TO HAWAI'I (AMONG THOSE VISITING 1+ TIMES)



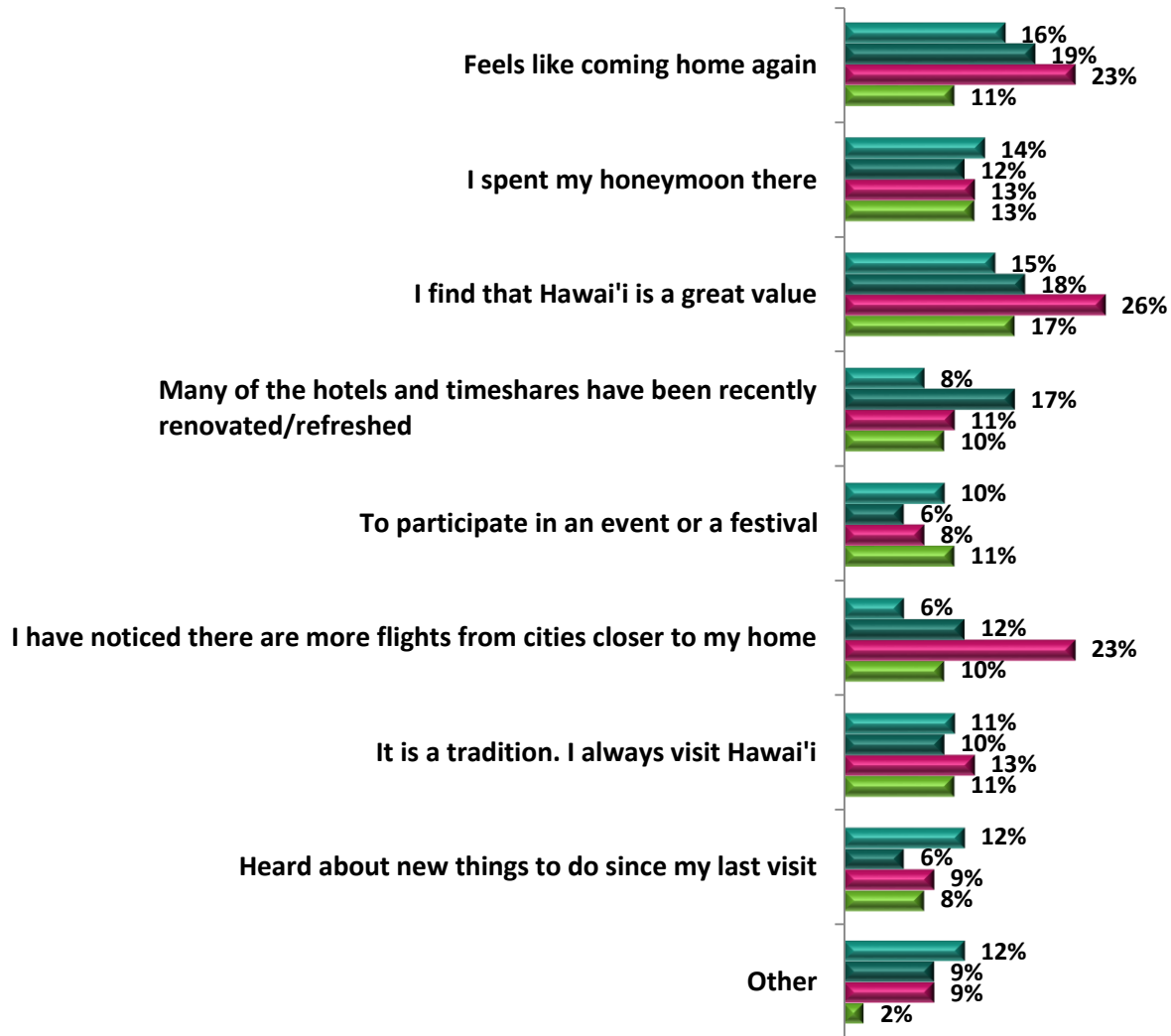
# REASONS FOR RETURNING TO HAWAII (AMONG THOSE VISITING HAWAII 2+ TIMES)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



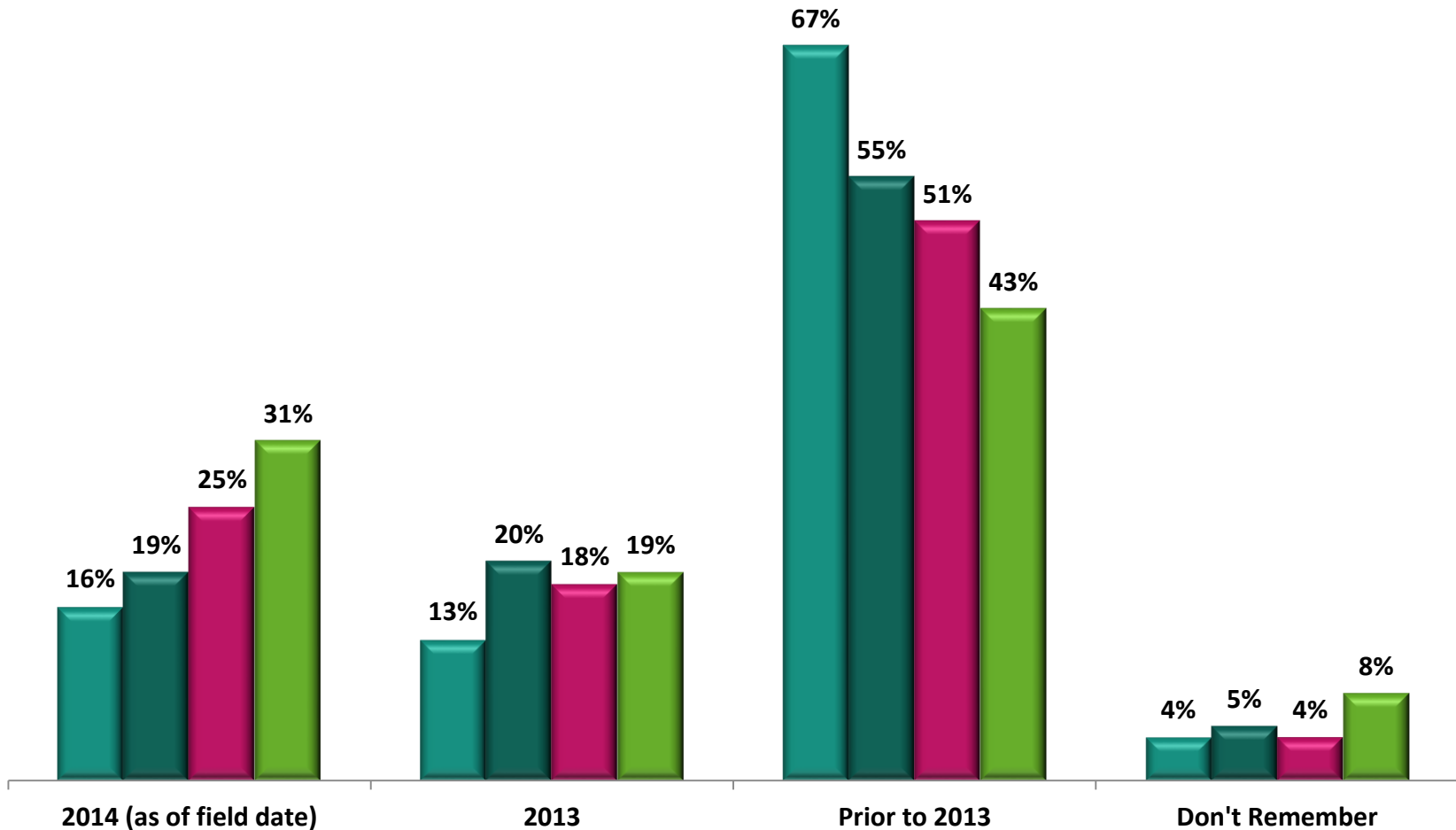
## REASONS FOR RETURNING TO HAWAI'I (CONT.) (AMONG THOSE VISITING HAWAI'I 2+ TIMES)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



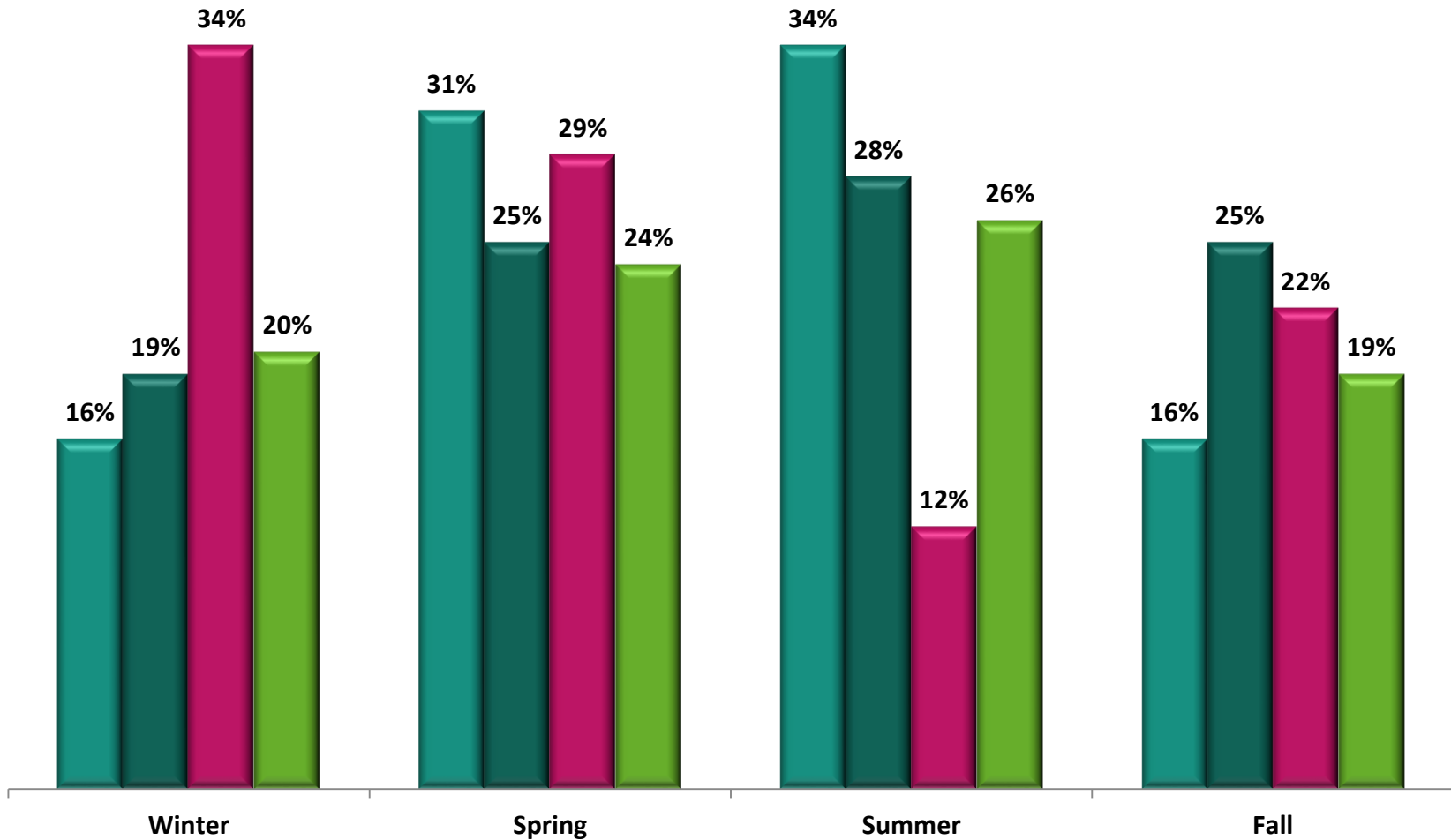
# YEAR LAST VISITED HAWAI'I

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



# SEASON LAST VISITED HAWAII

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



# LIKELIHOOD OF RETURNING TO HAWAI'I IN NEXT 24 MONTHS (%; MEAN)

