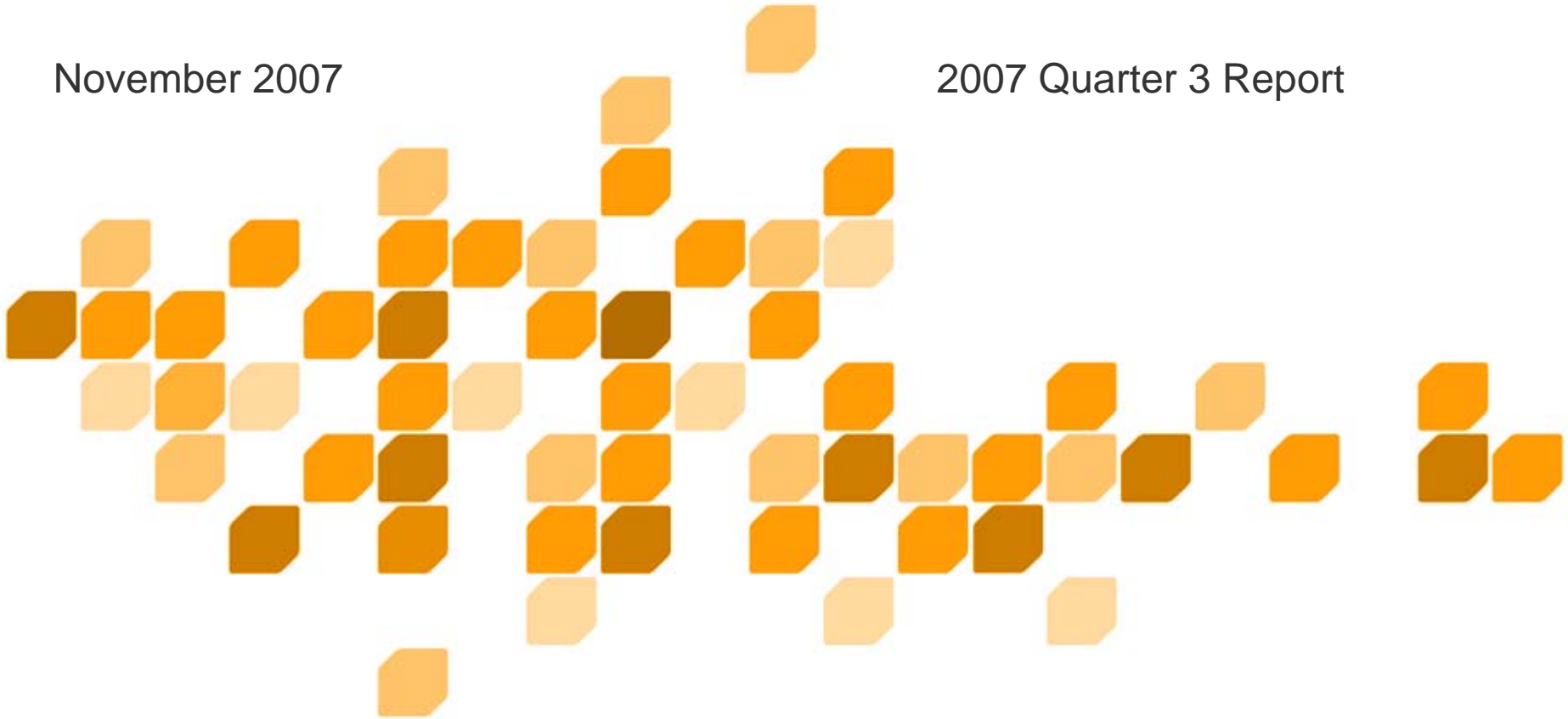


November 2007

2007 Quarter 3 Report



# Purposes and Methodology



# Research Objectives

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This is the 19th quarterly report of a tracking study for Hawaii.

Over time, this research tracks the impact and effectiveness of advertising campaigns. This wave (Q3, 2007) is the third wave using a new assessment of Hawaii vis-à-vis its competition. For each of various image attributes, respondents indicate which one(s), if any, of the listed destinations they **prefer**. TNS believes that being **preferred** on an attribute is far more relevant because it suggests that, when selected, Hawaii persuades people about that item and is a bigger achievement than simply creating awareness. If travelers prefer a destination, they perceive it as a leader.

Specifically, the study measures and monitors changes for the key topic listed below.

- Consideration of Hawaii as a Destination
- Importance of Attributes Grouped Within Factors
- Preference for Hawaii vs. Competitors on Each Image Attribute (Ranked by Importance Within Factors)
- Preference for Hawaii by Behavioral Segments and Spending Levels

In addition, the study tracks data on these topics as well (in the appendix):

- Intent and/or Actual Visits to Hawaii
- Travel Patterns and Info on Hawaii Trip (Accommodations, Length of Visit, Frequency, Satisfaction)
- Since Q3, 2006, Japanese Travelers Indicate Reasons for Not Intending/Considering Hawaii

Note: While the shift (to preference) in the image measurements precludes comparisons to prior year, the results provide more actionable results, and of course, is tracked for each additional wave.

# Methodology

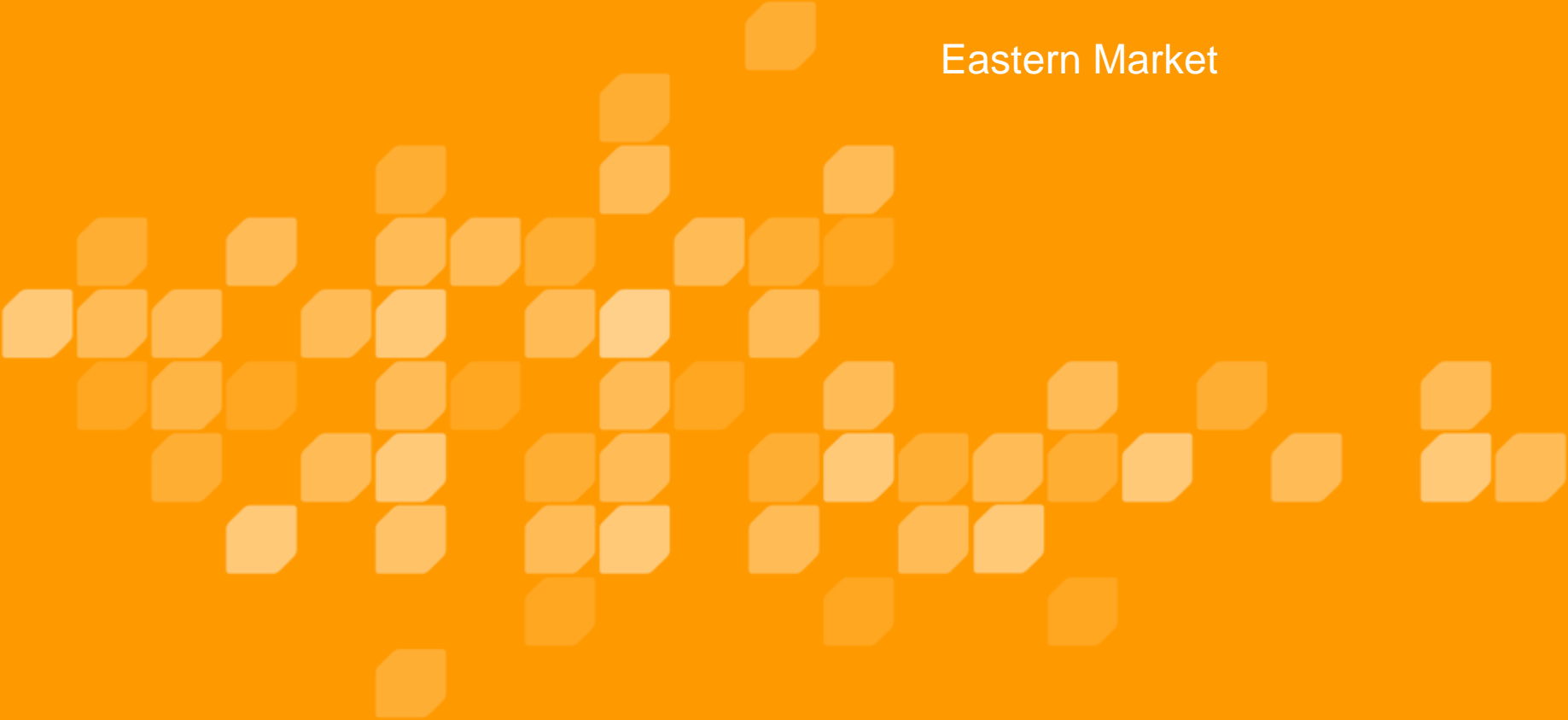
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## Research methods for Hawaii:

- Beginning in Quarter 1, 2006, the Hawaii tracking study shifted research methods from distributing mail-out questionnaires to posting an online survey.
- Between July 5, 2007 and October 3, 2007, 530 survey invitations (265 in the East and 265 in the West) were e-mailed each week in the US. Overall, 7,440 survey invitations were sent in the US.
- In Japan, potential respondents were pre-screened for international leisure trips in the past 2 years. Between July 6 and October 4, 41 surveys were e-mailed each week. Overall, 550 invitations were sent in Japan.
- Qualified respondents have taken an overnight leisure trip of 500 miles (US) or an international trip (Japan) in the past 24 months.

# Travel Patterns

Eastern Market



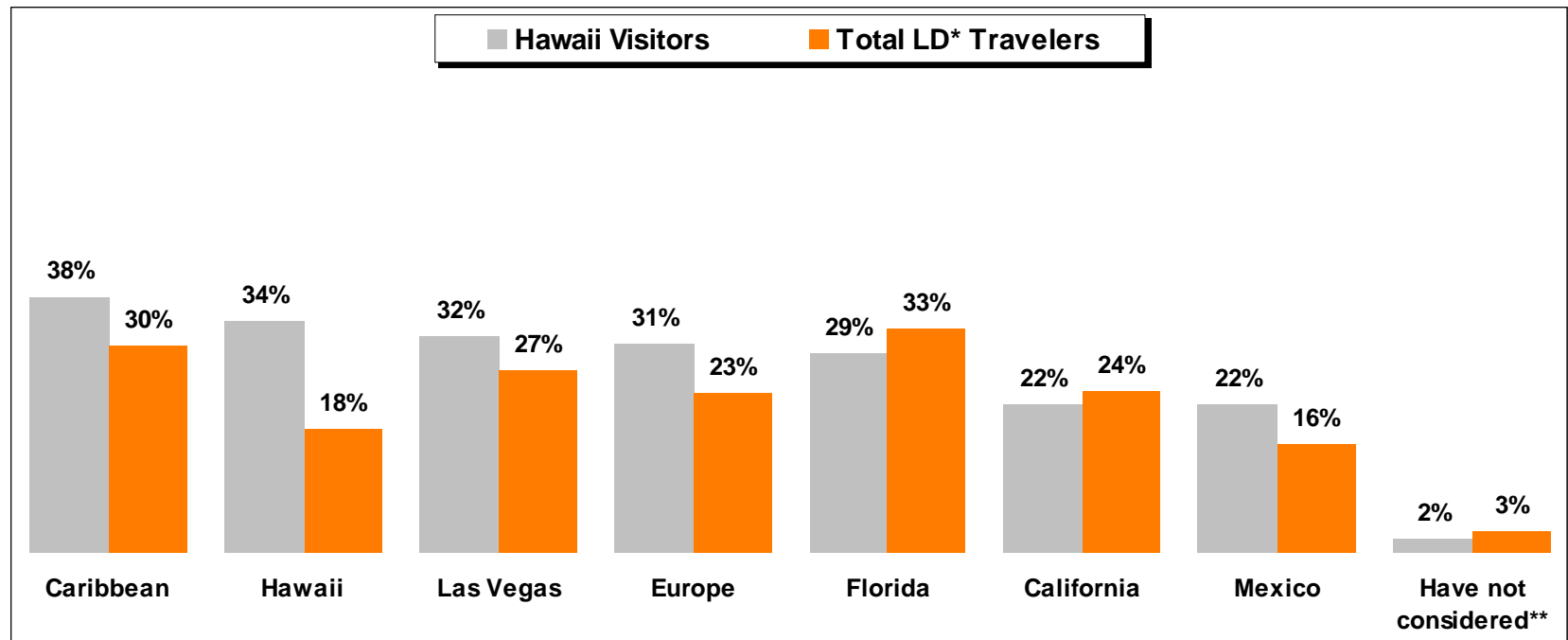
# Considered Destinations (Q3)

## Eastern US Market

The top destinations selected by Eastern US 500+ mile air travelers rank differently than those selected by Hawaii visitors:

- Proportionately more Hawaii visitors choose every destination except Florida and California, for which they show somewhat less interest. Of course, Hawaii appeals to past visitors (that is why they have been there), but as noted last wave, the Caribbean (38%) appeal slightly exceeds Hawaii (34%). Hawaii now ranks second, surpassing Las Vegas (32%).
- Returning to the traditional ranking vis-à-vis Florida, Hawaii visitors (past 3 years) are again less likely than other travelers to choose Florida (29% vs. 33%). However, they are still less likely to select California (22% vs. 24% -- they traditionally have been more likely).

YTD 2007



LD\* = Long-distance: 500+ mile air travelers

\*\*Pre-2006 data does not include, "Have not considered any future vacation destinations"

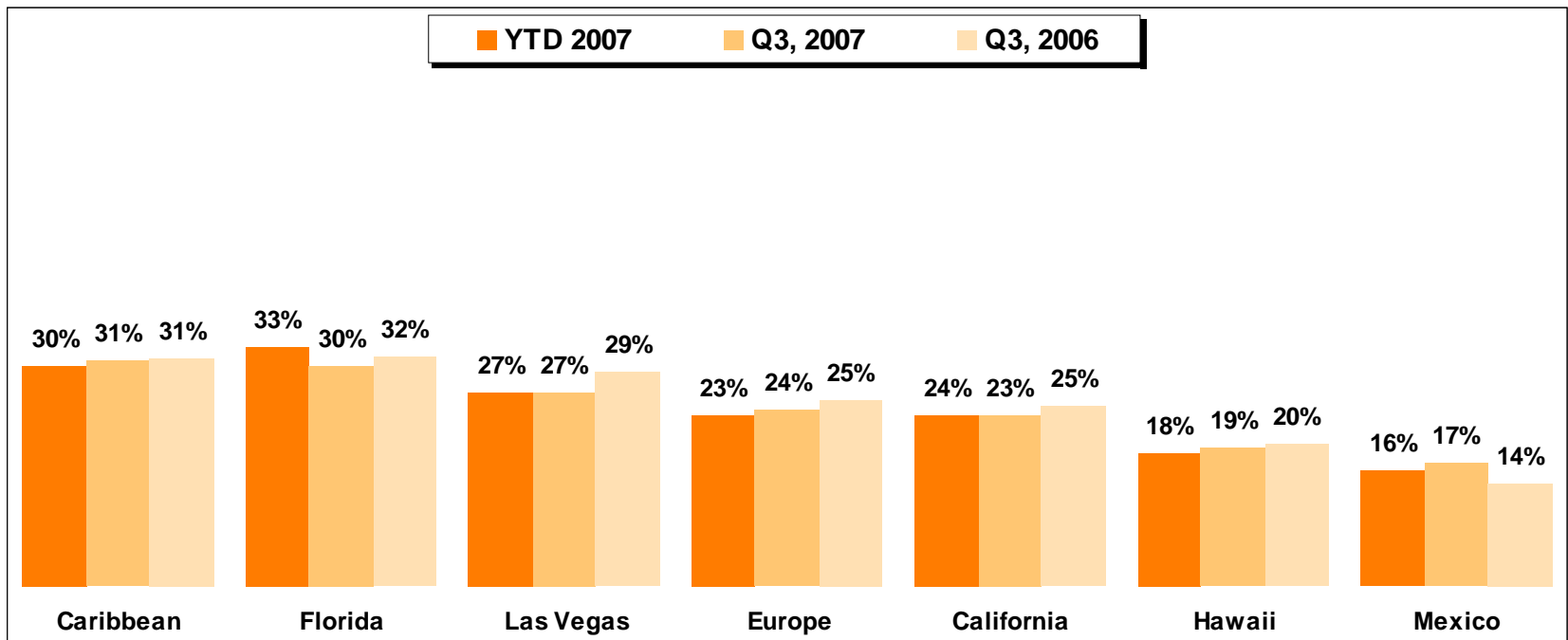
# Considered Destinations (Q3)

## Eastern US Market

With minor differences, Eastern US travelers tend to **rank** their list of considered destinations similarly from wave to wave:

- However, three destinations dip slightly in interest among Eastern US travelers since the same quarter a year ago: Florida, Las Vegas, and California (all reflecting 2%-point increases). Meanwhile, interest in Mexico increases (17% from 14%). The Caribbean, Europe, and Hawaii remain quite stable.
- The Caribbean marginally overtakes the usual leader, Florida, while Las Vegas remains in “third place.”

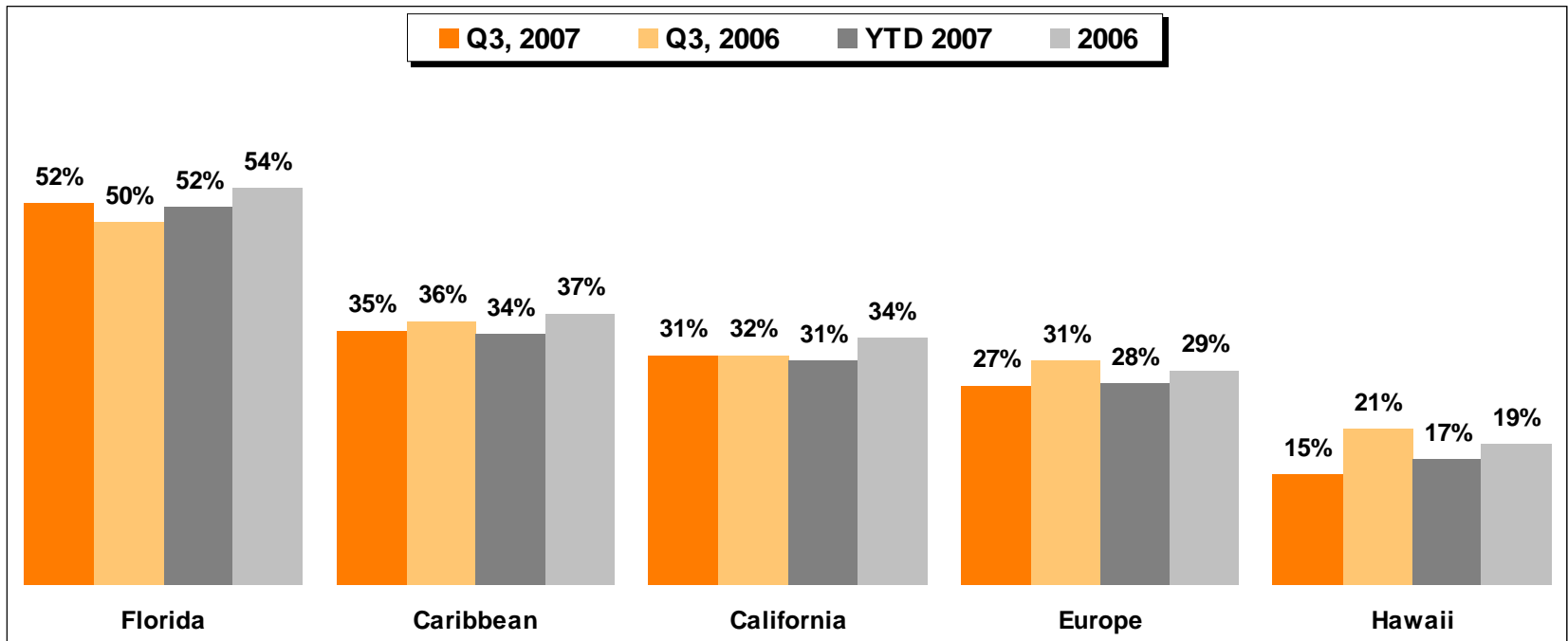
Total LD\* Travelers



\*LD=Long-distance travelers: 500+ Mile Air Trip in Past 12 Months

# Destinations Planned for Leisure within 24 Months (Q6)

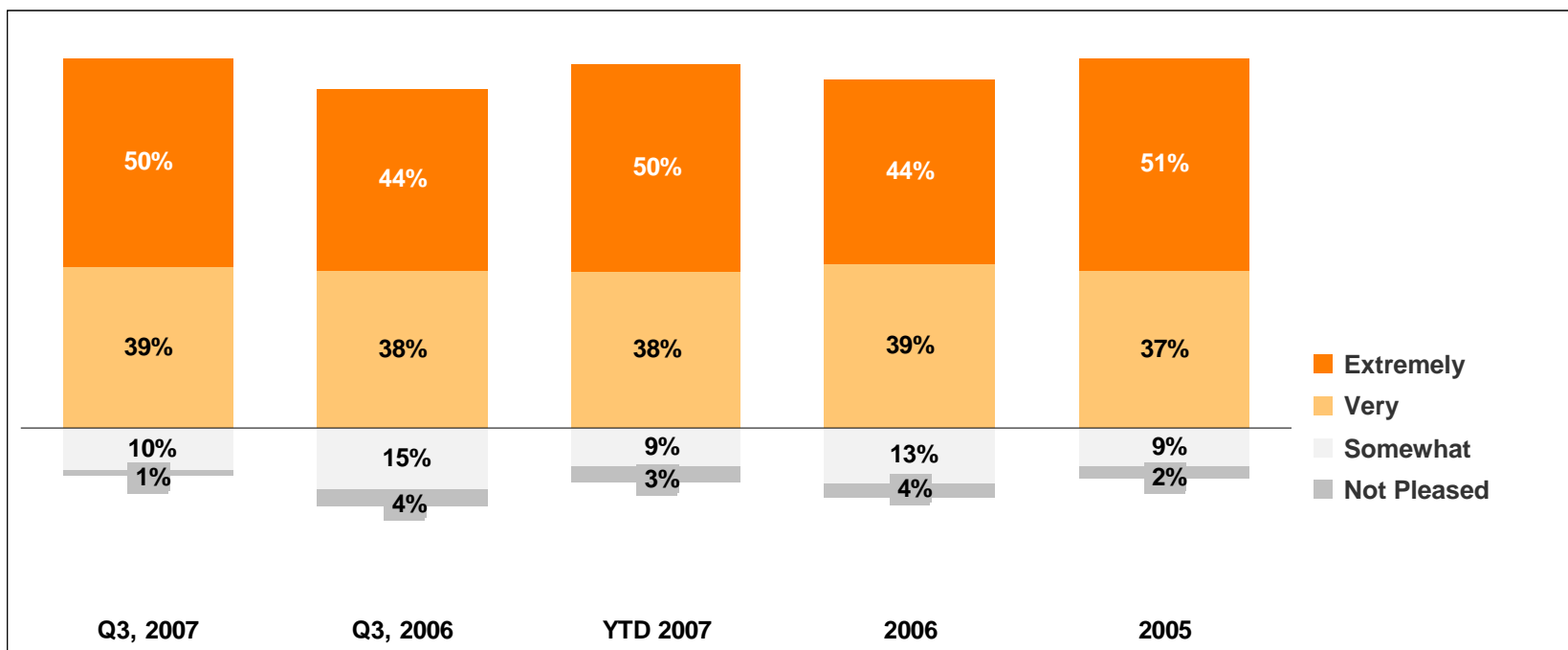
## Eastern US Market



# Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

## *Eastern US Market*

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# Importance of Attributes and Preferences for Hawaii and Competitors

Eastern Market



# Prefer Hawaii by Year (Q5)

## Eastern US Market

Overall:

- Within the leading factor (Easy, Value, Safe, Clean), Hawaii gets its highest recognition for providing a *clean environment* and *safety/security*.
- The distance (*easy to get there*) and *value* attributes detract from Hawaii's image.
- Although the Eastern US Market perceives Hawaii's *scenery as unique*, they also feel that Hawaii succumbs to some *over-development*.
- Hawaii receives positive feedback on its *activities, experiences, history, and culture*.

### Easy, Value, Safe, Clean

- Safe and Secure (4.43)
- Good Value for the Money (4.32)
- Clean Environment (4.20)
- Easy to Get Around (4.12)
- Variety of Types/Prices of Accommodations (3.95)
- Easy to Get There (3.92)

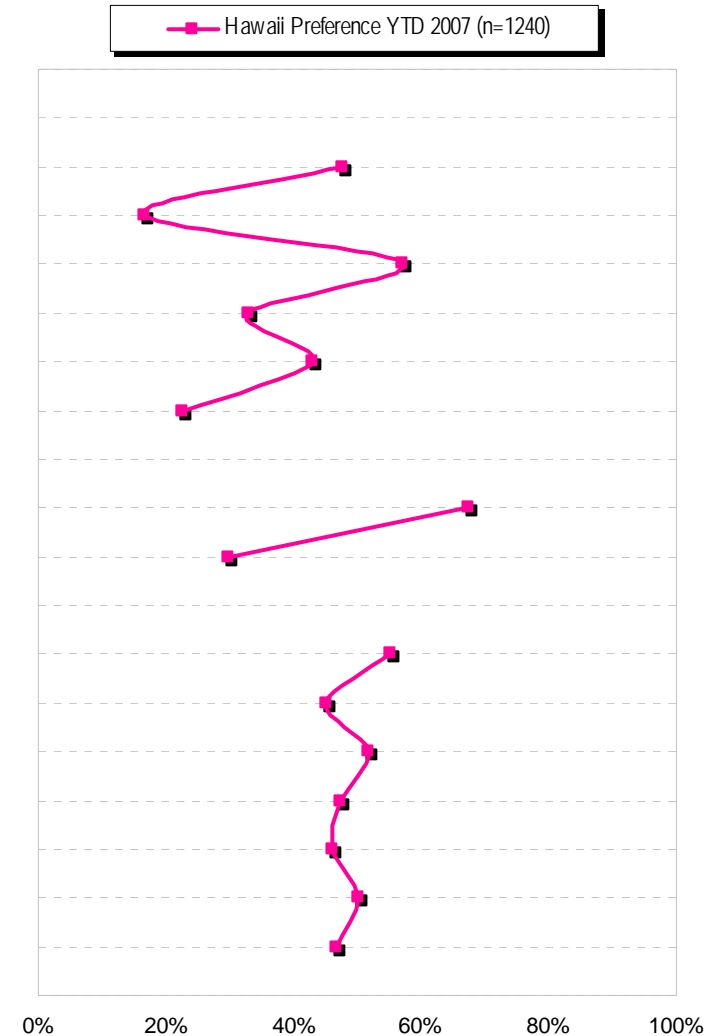
### Unique and Unspoiled

- Unique Scenery Unlike Anywhere Else (3.81)
- Unspoiled, Not Overdeveloped (3.32)

### New Discoveries/Unique

- Variety of Unique Activities & Experiences (3.94)
- Always More to Keep Coming Back (3.87)
- Different Experience Than Other Places (3.81)
- Always New Experiences for the Visitor (3.76)
- Intriguing History and Culture (3.74)
- Opportunities for New Discoveries (3.72)
- Variety of Cultural Activities (3.57)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Eastern US Market) Noted in Labels



# Prefer Hawaii by Year (Q5)

## Eastern US Market

Overall, con't:

- The Hawaiian islands provide substantial *hospitality*, but the area ranks lower as a *place to take children* – probably impacted by the cost and distance of the trip.
- The social scene receives high marks – especially as a *romantic place*, but the *nightlife* falls short. Consistent with the results for *nightlife*, Hawaii also receives scant recognition as a *great place for entertainment*.
- Hawaii's *wide variety, nature-based activities, and adventure activities* appeal to travelers.
- *Golfing* lags most other attributes.

### Good for Family; Friendly

Local People Are Friendly (4.15)

Good Place for Family/Children (3.10)

### Social Scene

Great Place to Get Away From It All (4.19)

Variety of Cuisine/Dining Options (3.85)

Romantic (2.91)

Variety of Nightlife (2.60)

### Active Recreational Choices

Wide Variety of Recreational Choices (3.52)

Nature-Based Activities (2.95)

Adventure Activities (2.65)

### Events and Entertainment

Great Place for Entertainment (3.36)

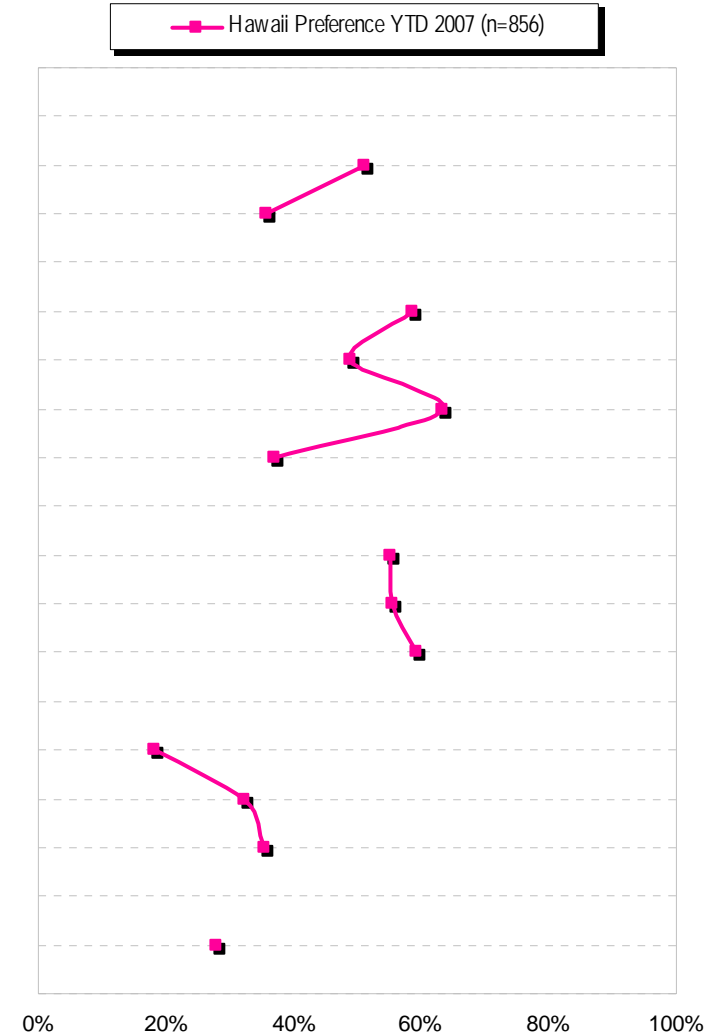
Great Place for Shopping (3.34)

Special Events/Festivals (3.11)

### Golfing

Great Place to Golf (1.62)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Eastern US Market) Noted in Labels



# Prefer Destination (Q5)

## Eastern US Market

Competitively (Hawaii vs. California, Europe, the Caribbean, and Florida):

- Within the most important factor, **Hawaii** leads all other destinations by a wide margin for its *clean environment* and by a smaller margin on *safe/secure*.
- In contrast, **Hawaii** ranks next-to-last on distance (*easy to get there*) and last on *good value for the money*, and *variety of types/prices of accommodations*.
- **Hawaii** ranks first on *unique scenery*, and although it receives generally low preference for its pristine environment (*unspoiled*), it still places higher than all of these competitors except the **Caribbean**.
- **Hawaii** receives positive (second-place) feedback on its *activities, experiences, history, and culture*, surpassed only by **Europe**; with minor competitive pressure from the **Caribbean**.

### Easy, Value, Safe, Clean

Safe and Secure (4.43)
Good Value for the Money (4.32)
Clean Environment (4.20)
Easy to Get Around (4.12)
Variety of Types/Prices of Accommodations (3.95)
Easy to Get There (3.92)

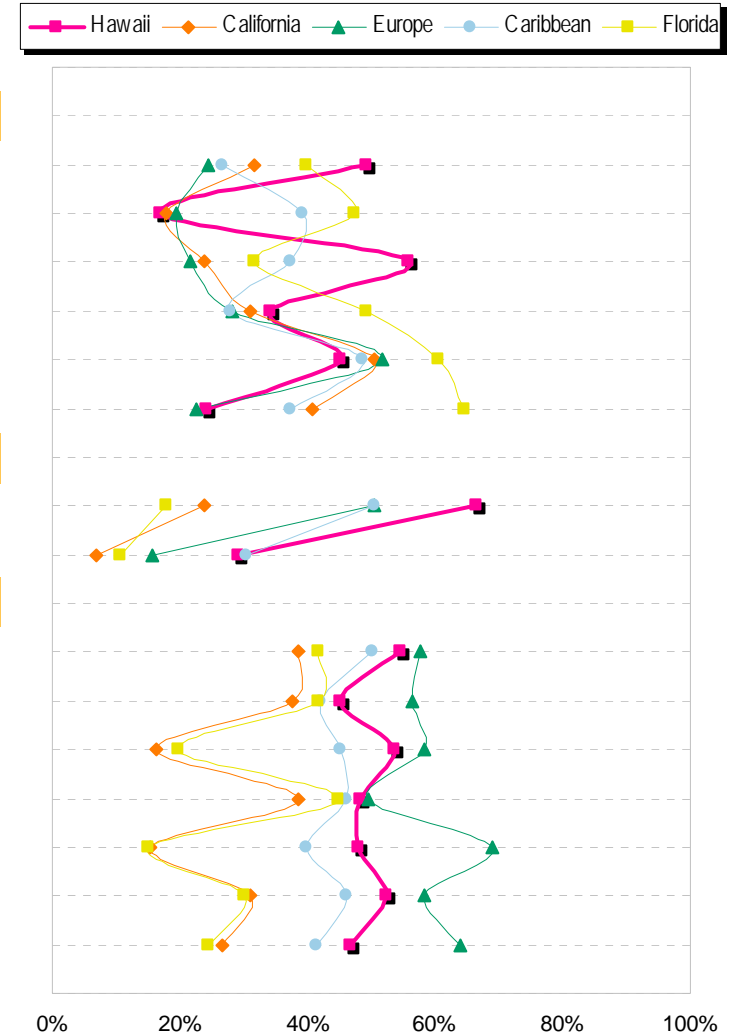
### Unique and Unspoiled

Unique Scenery Unlike Anywhere Else (3.81)
Unspoiled, Not Overdeveloped (3.32)

### New Discoveries/Unique

Variety of Unique Activities & Experiences (3.94)
Always More to Keep Coming Back (3.87)
Different Experience Than Other Places (3.81)
Always New Experiences for the Visitor (3.76)
Intriguing History and Culture (3.74)
Opportunities for New Discoveries (3.72)
Variety of Cultural Activities (3.57)

Destination Preferred (% for Each Attribute)  
Average Importance (Eastern US Market) Noted in Labels



# Prefer Destination (Q5)

## Eastern US Market

Competitively (Hawaii vs. California, Europe, the Caribbean, and Florida), con't:

- The Hawaiian islands provide the highest level of *hospitality*, but substantially trails Florida as a *place to take children*.
- In The social scene, Hawaii “sets the bar” as a *romantic* destination and it ties the Caribbean as a *great place to get away from it all*. However, it places near the middle of the other attributes except *variety of nightlife*, where it joins Europe in last place.
- Hawaii either leads or places near the leader on all three of the active recreational choice attributes.
- Hawaii's poorest competitive performance occurs on attributes within the least important factor: Events and Entertainment.
- For golfing, Eastern US Market travelers position Hawaii in the middle; Florida leads.

### Good for Family; Friendly

Local People Are Friendly (4.15)

Good Place for Family/Children (3.10)

### Social Scene

Great Place to Get Away From It All (4.19)

Variety of Cuisine/Dining Options (3.85)

Romantic (2.91)

Variety of Nightlife (2.60)

### Active Recreational Choices

Wide Variety of Recreational Choices (3.52)

Nature-Based Activities (2.95)

Adventure Activities (2.65)

### Events and Entertainment

Great Place for Entertainment (3.36)

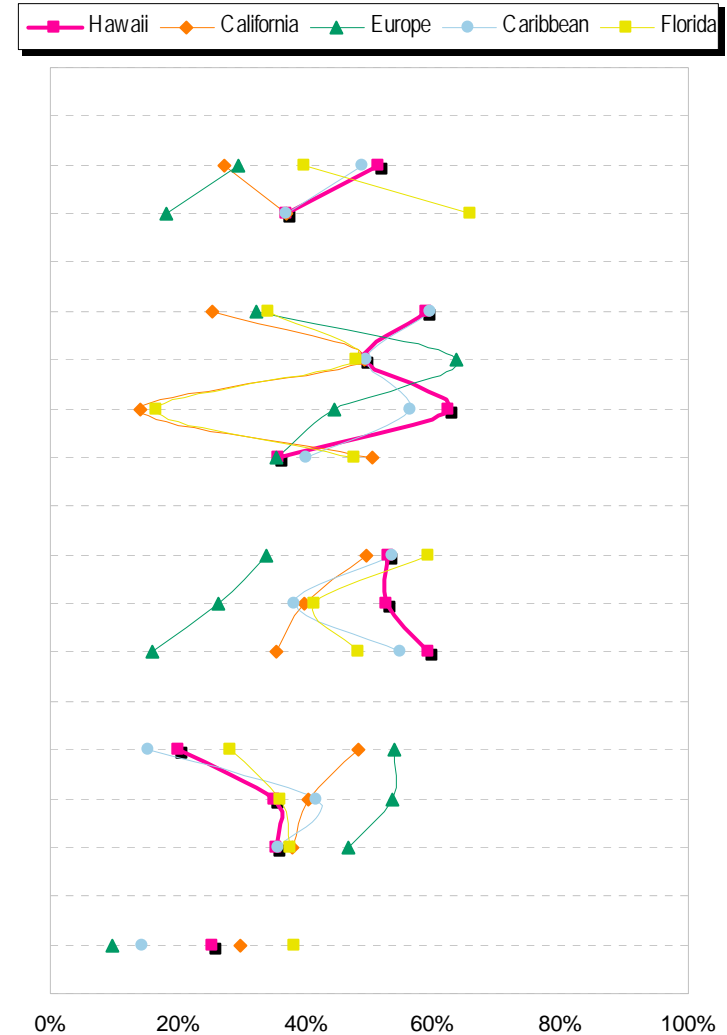
Great Place for Shopping (3.34)

Special Events/Festivals (3.11)

### Golfing

Great Place to Golf (1.62)

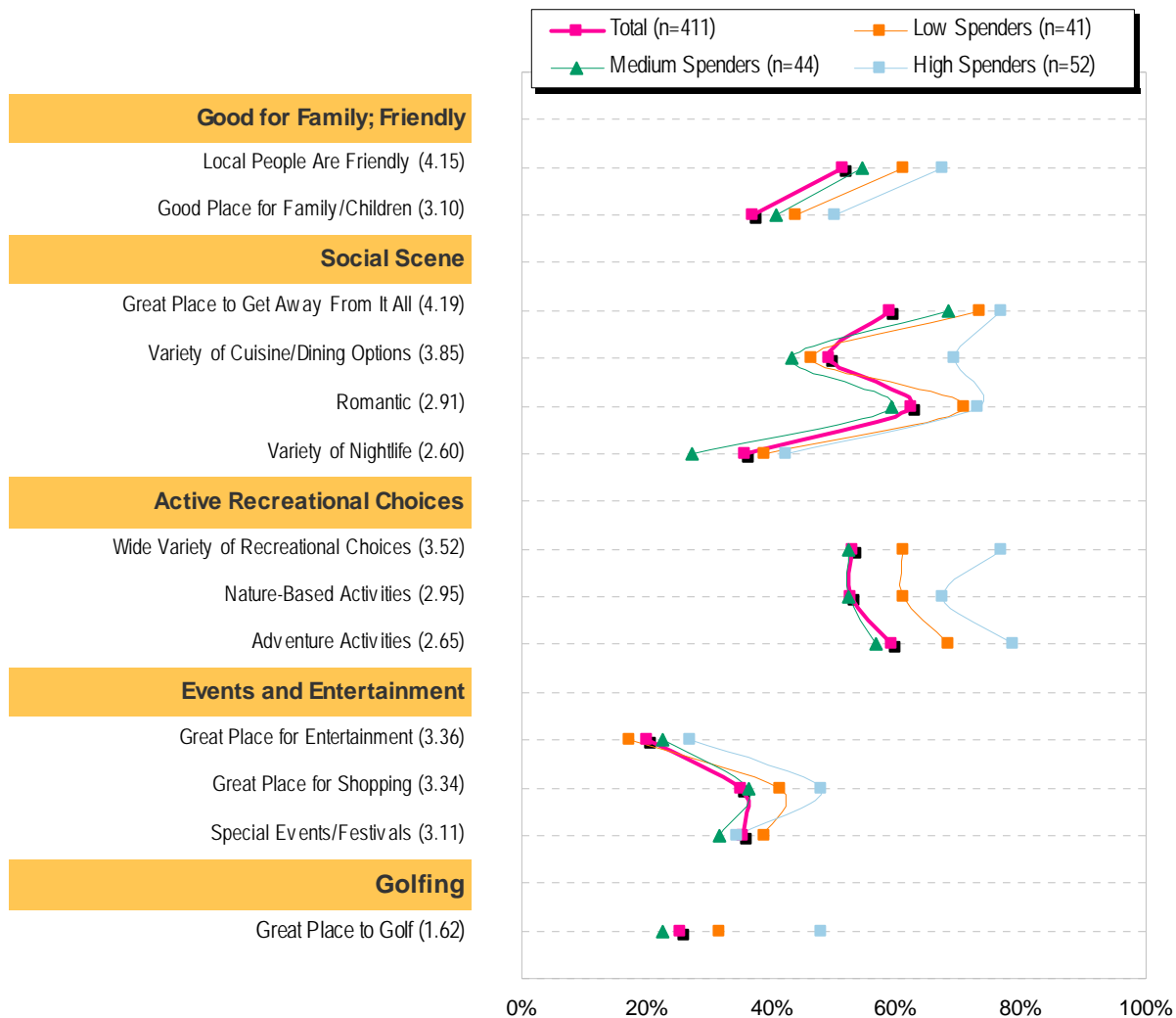
Destination Preferred (% for Each Attribute)  
Average Importance (Eastern US Market) Noted in Labels



# Prefer Hawaii by Spending Segments (Q5)

## Eastern US Market

Hawaii Preferred (% for Each Attribute)  
Average Importance (Eastern US Market) Noted in Labels



# Travel Patterns

Western Market



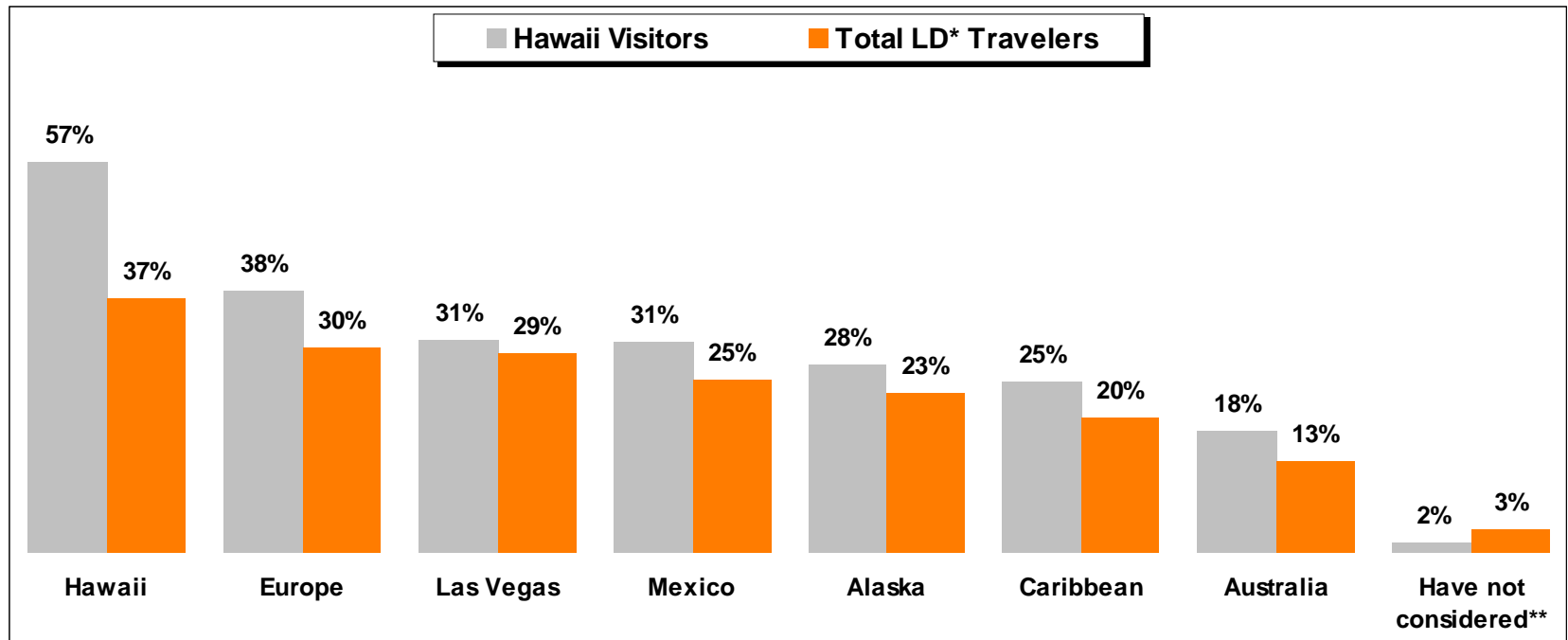
# Considered Destinations (Q3)

## Western US Market

The top destinations selected by Western US 500+ mile air travelers rank similarly to those selected by Hawaii visitors:

- The **rank order** of top destinations considered by Western US 500+ mile air travelers is similar to those considered by travelers who have visited Hawaii, except that total long-distance travelers rank Las Vegas higher than Mexico while the two destinations tie for Hawaii visitors.
- Those who visited Hawaii in the past three years are more likely to choose each of these destinations than other travelers – and more than half (57%) are likely to consider visiting Hawaii again.

### YTD 2007



LD\* = Long-distance: 500+ mile air travelers

\*\*Pre-2006 data does not include "Have not considered any future vacation destinations"

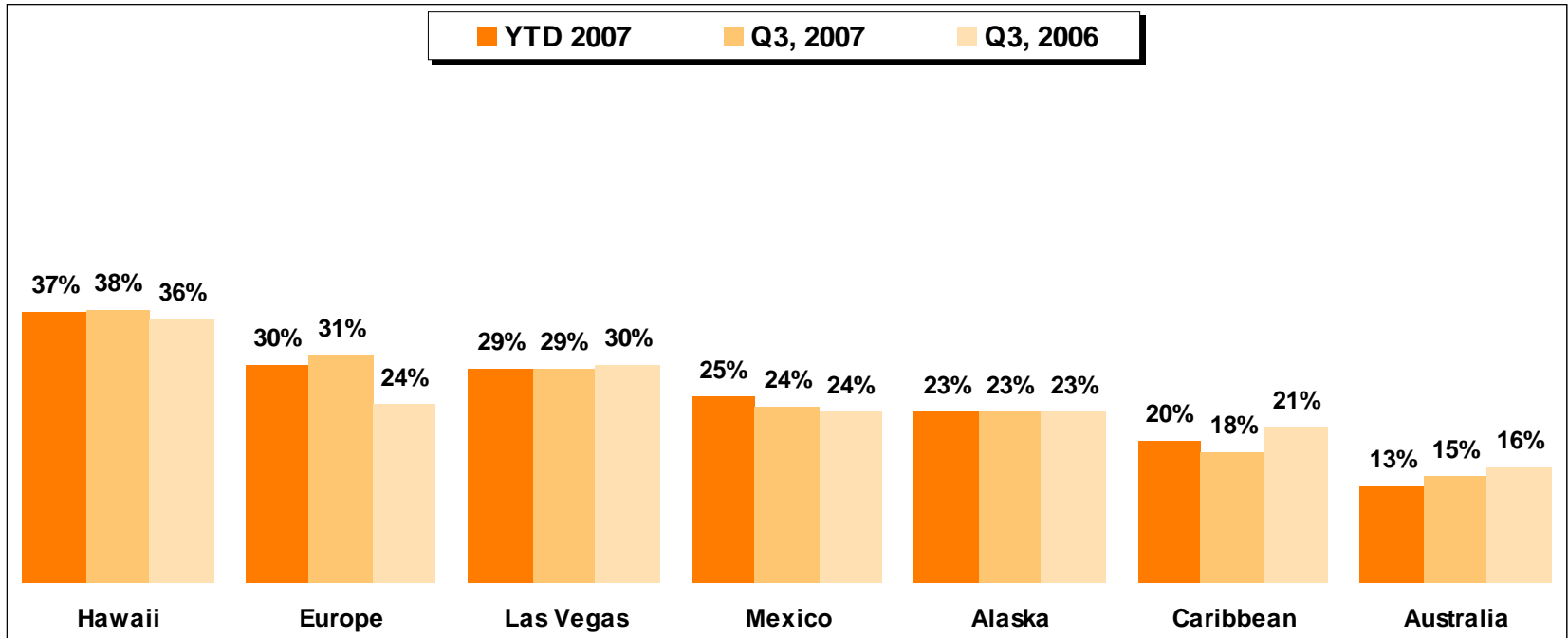
# Considered Destinations (Q3)

## Western US Market

Quarter 3 highlights:

- Among Western long-distance travelers, Hawaii consistently leads competing destinations.
- Quarter to quarter, 2007 travelers consider visitation to most of these destinations similarly to 2006 travelers. Hawaii, Las Vegas, Mexico, Alaska, and Australia results change relatively little.
- However, interest in the Europe waxes (31% from 24%) while interest in the Caribbean wanes (18% from 21%).

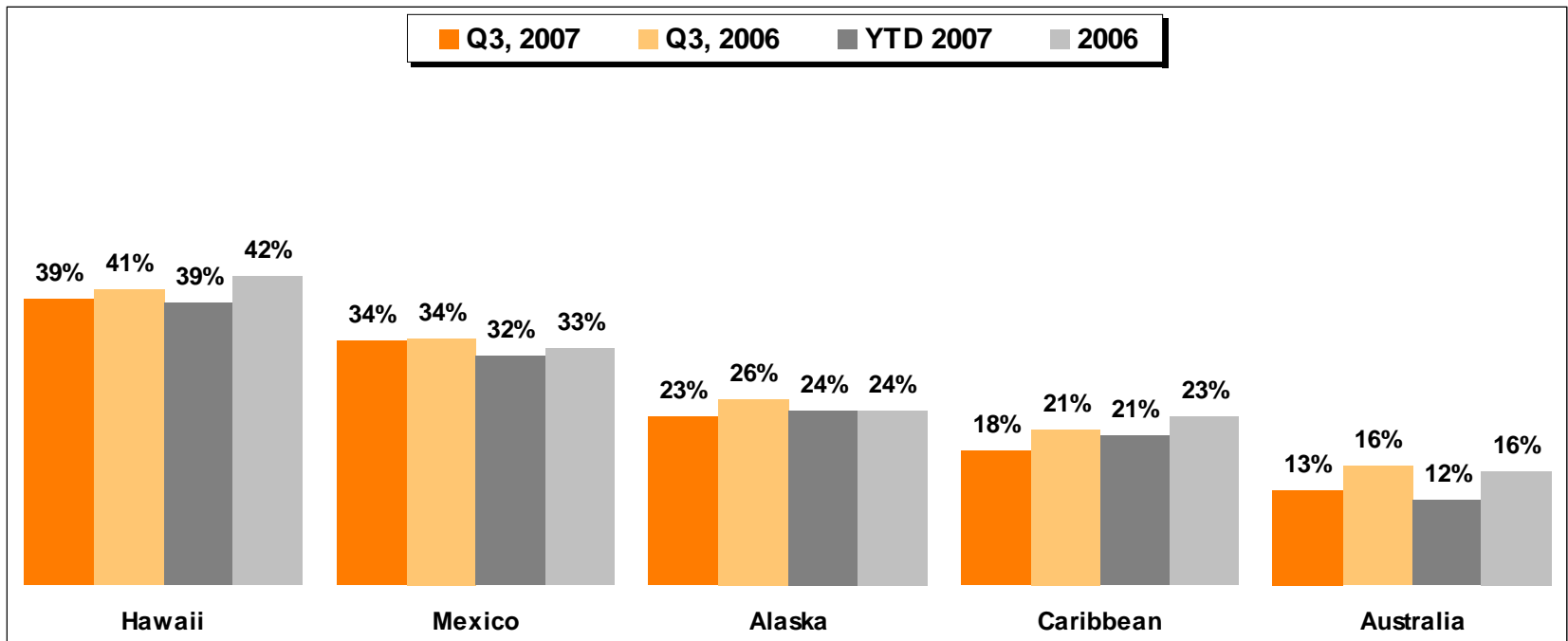
Total LD\* Travelers



\*LD=Long-distance travelers: 500+ Mile Air Trip in Past 12 Months

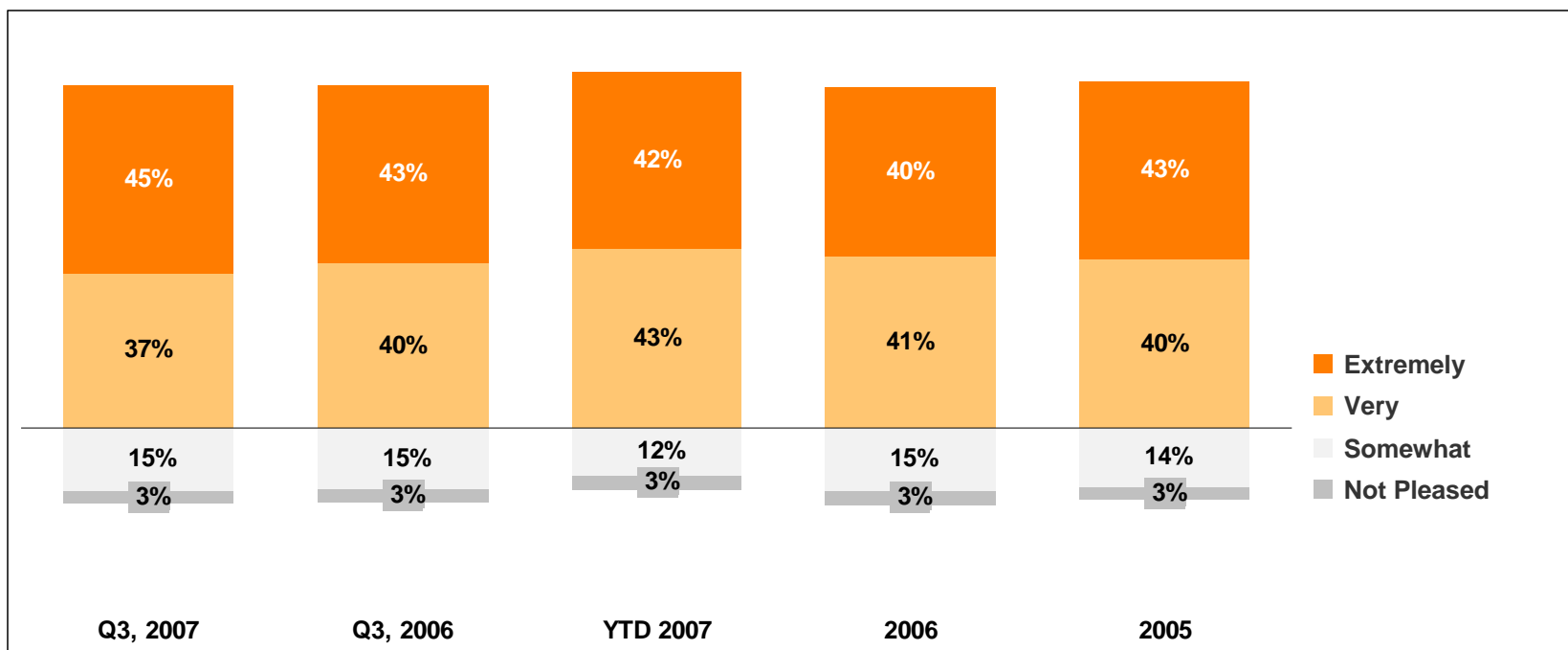
# Destinations Planned for Leisure within 24 Months (Q6)

## Western US Market



# Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

## *Western US Market*



# Importance of Attributes and Preferences for Hawaii and Competitors

Western Market



# Prefer Hawaii by Year (Q5)

## Western US Market

### Overall:

- Within the leading factor (Easy, Value, Safe, Clean), Hawaii gets its highest recognition for *safety/security and variety of types/prices of accommodations*.
- The primary “detractor” is *good value for the money*.
- Each of the remaining attributes in the top factor receives relatively strong preferences.
- Similar to those in the Eastern US Market, Western US Market residents perceive Hawaii’s *scenery as unique*, but agree that Hawaii may be *over-developed*.
- Hawaii receives positive feedback on its *activities, experiences, history, and culture*. However, within this factor, *different experience than other places* lags other attributes.

### Easy, Value, Safe, Clean

Safe and Secure (4.31)
Good Value for the Money (4.24)
Clean Environment (4.07)
Easy to Get Around (4.04)
Variety of Types/Prices of Accommodations (3.88)
Easy to Get There (3.79)

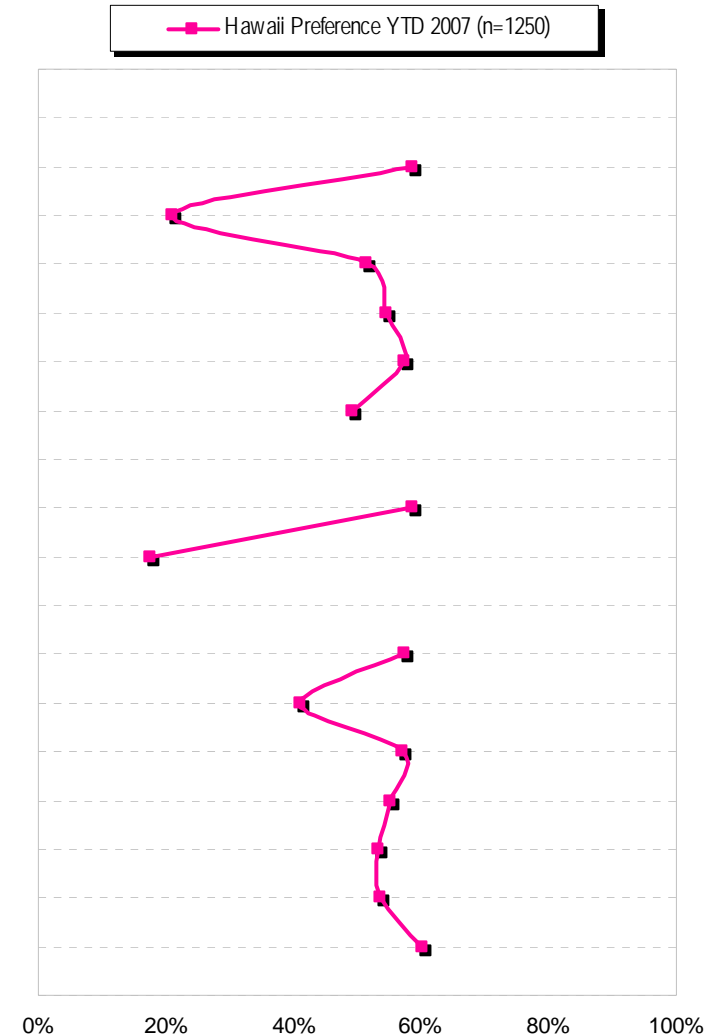
### Unique and Unspoiled

Unique Scenery Unlike Anywhere Else (3.84)
Unspoiled, Not Overdeveloped (3.36)

### New Discoveries/Unique

Variety of Unique Activities & Experiences (3.91)
Different Experience Than Other Places (3.85)
Always More to Keep Coming Back (3.84)
Intriguing History and Culture (3.79)
Opportunities for New Discoveries (3.74)
Always New Experiences for the Visitor (3.68)
Variety of Cultural Activities (3.56)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Western US Market) Noted in Labels



# Prefer Hawaii by Year (Q5)

## Western US Market

Overall, con't:

- Those in the Western US Market feel that the Hawaiian islands provide substantial *hospitality*, and contrary to those in the Eastern US Market, Westerners assign even higher marks (than to hospitality) to Hawaii as a *good place for family/children*.
- Matching the pattern seen in the Eastern US Market, the Social Scene receives strong preference “votes” – especially as a *romantic* place. However, *nightlife* falls short and it receives scant recognition as a *great place for entertainment*.
- Hawaii's *varied, nature-based, and adventure activities* appeal to travelers.

### Good for Family; Friendly

Local People Are Friendly (4.05)

Good Place for Family/Children (2.95)

### Social Scene

Great Place to Get Away From It All (4.10)

Variety of Cuisine/Dining Options (3.78)

Romantic (2.95)

Variety of Nightlife (2.52)

### Active Recreational Choices

Wide Variety of Recreational Choices (3.43)

Nature-Based Activities (2.98)

Adventure Activities (2.70)

### Events and Entertainment

Great Place for Entertainment (3.27)

Great Place for Shopping (3.21)

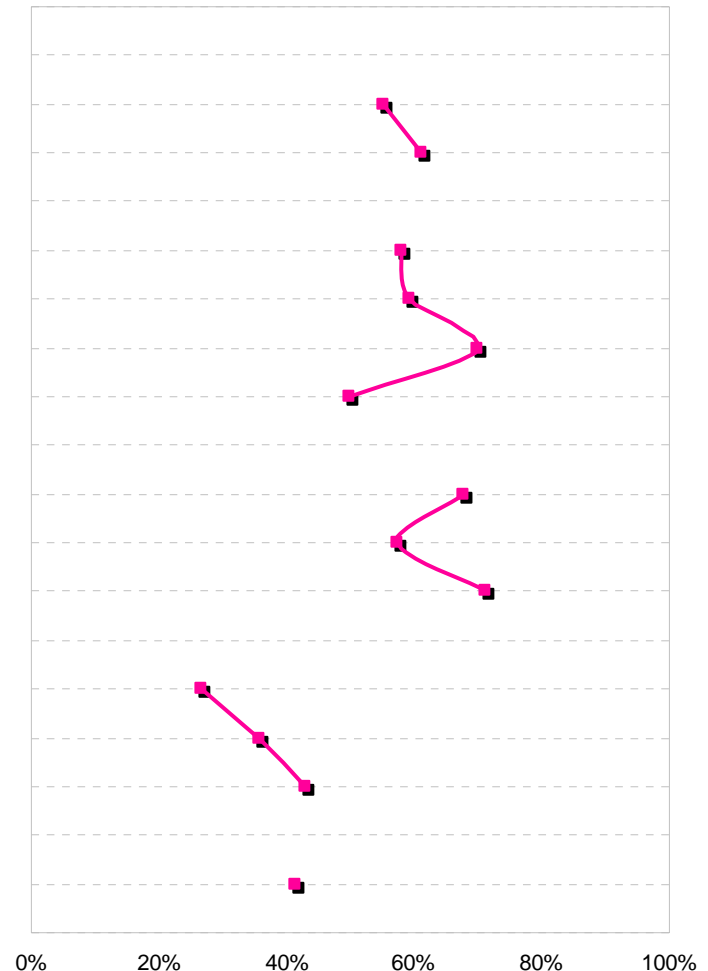
Special Events/Festivals (3.06)

### Golfing

Great Place to Golf (1.67)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Western US Market) Noted in Labels

Hawaii Preference YTD 2007 (n=1250)



# Prefer Destination (Q5)

## Western US Market

Competitively (**Hawaii** vs. **Alaska**, **Australia**, the **Caribbean**, and **Mexico**):

- Within the most important factor, **Hawaii** leads all other destinations by a wide margin for *easy to get around*, holds a smaller lead on *variety of accommodations*, and approaches the top spot held by **Alaska** on *safety/ security* and by **Mexico** on *easy to get there*.
- In contrast, **Hawaii** and the other destinations place much lower than **Mexico** on *good value for the money*.
- Hawaii** ranks/ties for second on *unique and unspoiled attributes*. **Alaska** leads on both; **Australia** and **Hawaii** vie for second-place on *unique scenery*.
- Hawaii** receives mixed feedback on *New Discoveries/Unique attributes*. It leads or approaches the lead on all but three *variety of unique activities/experiences*, *difference experience than other places*, and *opportunities for new discoveries*. **Australia**, **Alaska**, and **Hawaii** swap the lead on the attributes in this factor. **Mexico** ranks second on *intriguing history/culture*.

### Easy, Value, Safe, Clean

- Safe and Secure (4.31)
- Good Value for the Money (4.24)
- Clean Environment (4.07)
- Easy to Get Around (4.04)
- Variety of Types/Prices of Accommodations (3.88)
- Easy to Get There (3.79)

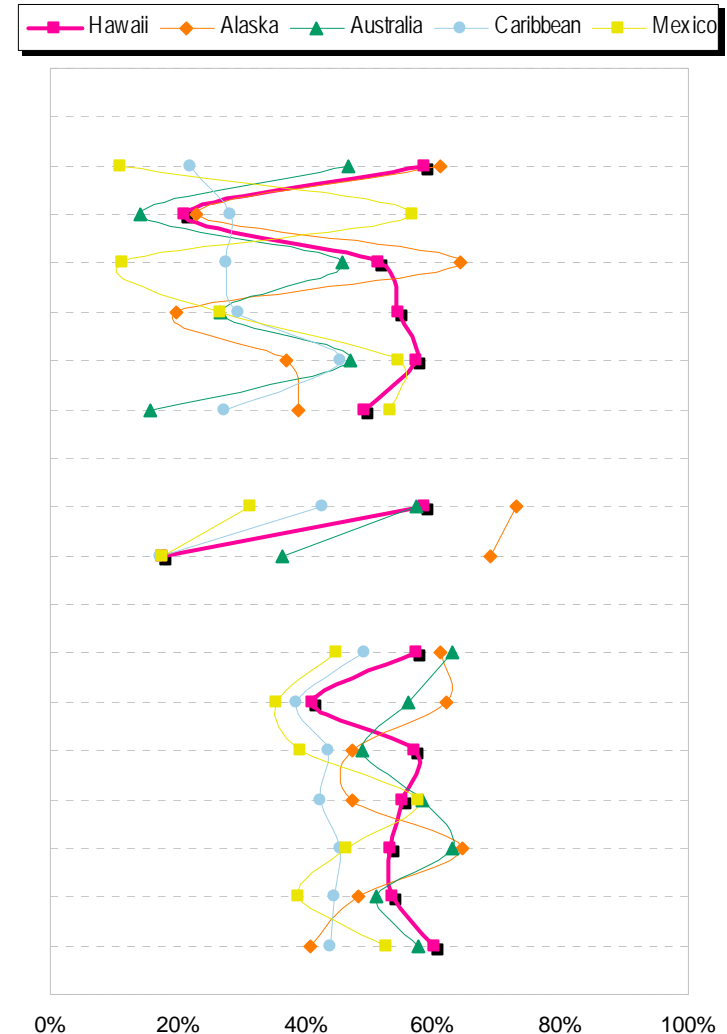
### Unique and Unspoiled

- Unique Scenery Unlike Anywhere Else (3.84)
- Unspoiled, Not Overdeveloped (3.36)

### New Discoveries/Unique

- Variety of Unique Activities & Experiences (3.91)
- Different Experience Than Other Places (3.85)
- Always More to Keep Coming Back (3.84)
- Intriguing History and Culture (3.79)
- Opportunities for New Discoveries (3.74)
- Always New Experiences for the Visitor (3.68)
- Variety of Cultural Activities (3.56)

Destination Preferred (% for Each Attribute)  
Average Importance (Western US Market) Noted in Labels



# Prefer Destination (Q5)

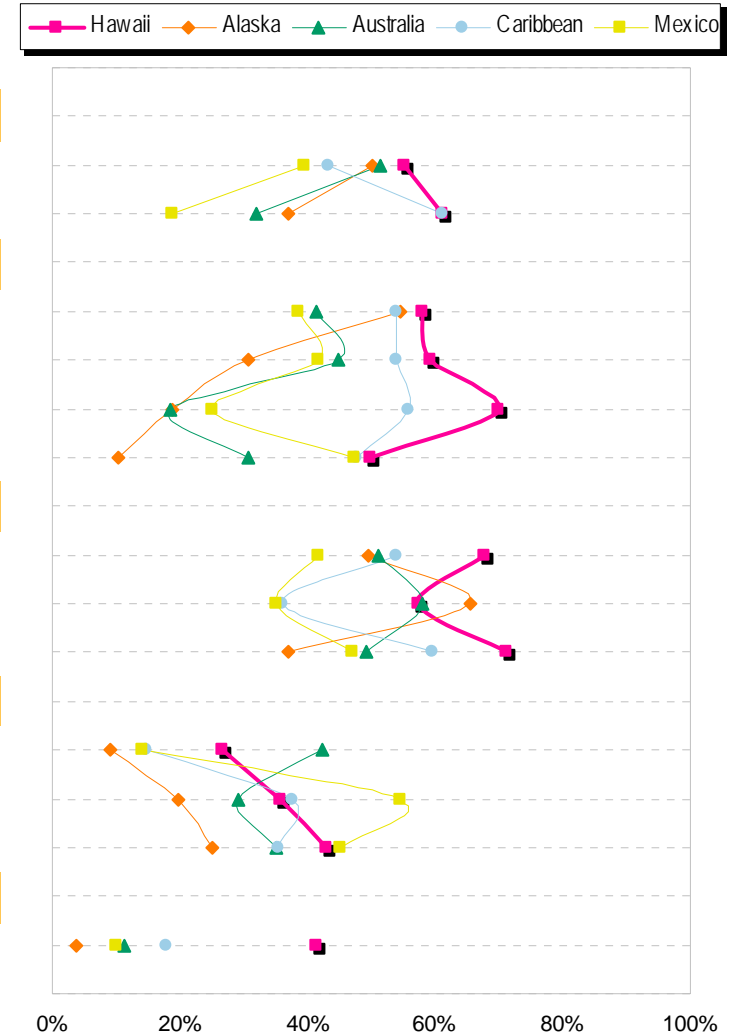
## Western US Market

Competitively (Hawaii vs. Alaska, Australia, the Caribbean, and Mexico), con't:

- US Western travelers prefer the **Hawaiian** islands for *hospitality* and **Hawaii** surpasses all but the **Caribbean** (which it ties) as a *good place for family/children*.
- In the Social Scene, **Hawaii** “owns” the factor, especially the *romantic* attribute. However, its lead shrinks on *variety of nightlife*, where the **Caribbean** and **Mexico** exert some competitive pressure.
- Hawaii** leads on *variety of recreational choices* and *adventure activities*, but yields to **Alaska** and ties **Australia** on *nature-based activities*.
- None of these competitors receives strong preferences within Events and Entertainment. That said, **Hawaii** never falls below third place and vies with **Mexico** for the lead as a place with *special events/ festivals*.
- For golfing, Western US Market travelers position **Hawaii** as the clear leader.

Destination Preferred (% for Each Attribute)  
Average Importance (Western US Market) Noted in Labels

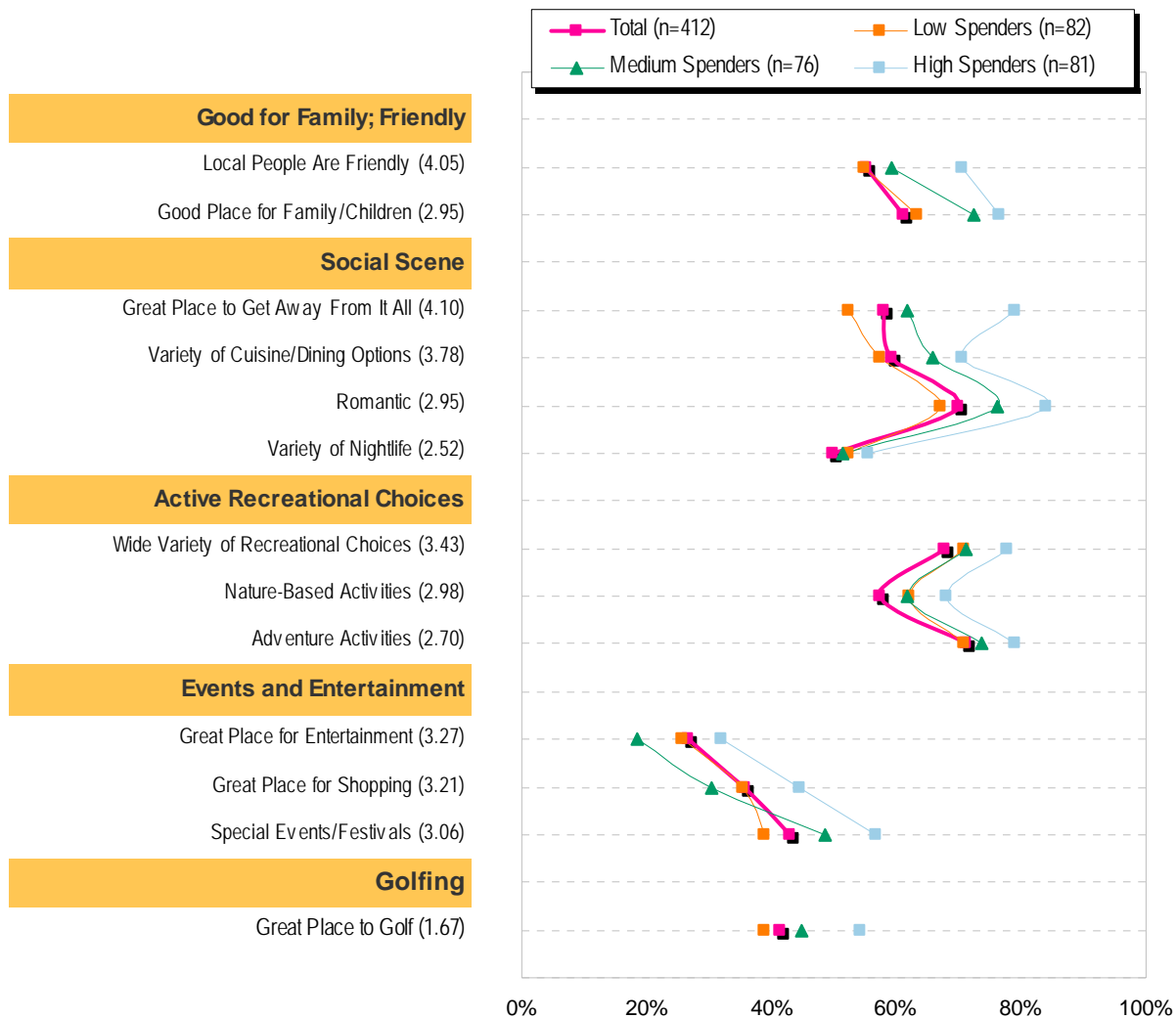
Attribute	Average Importance
<b>Good for Family; Friendly</b>	
Local People Are Friendly	4.05
Good Place for Family/Children	2.95
<b>Social Scene</b>	
Great Place to Get Away From It All	4.10
Variety of Cuisine/Dining Options	3.78
Romantic	2.95
Variety of Nightlife	2.52
<b>Active Recreational Choices</b>	
Wide Variety of Recreational Choices	3.43
Nature-Based Activities	2.98
Adventure Activities	2.70
<b>Events and Entertainment</b>	
Great Place for Entertainment	3.27
Great Place for Shopping	3.21
Special Events/Festivals	3.06
<b>Golfing</b>	
Great Place to Golf	1.67



# Prefer Hawaii by Spending Segments (Q5)

## Western US Market

Hawaii Preferred (% for Each Attribute)  
Average Importance (Western US Market) Noted in Labels



# Travel Patterns

Japanese Market



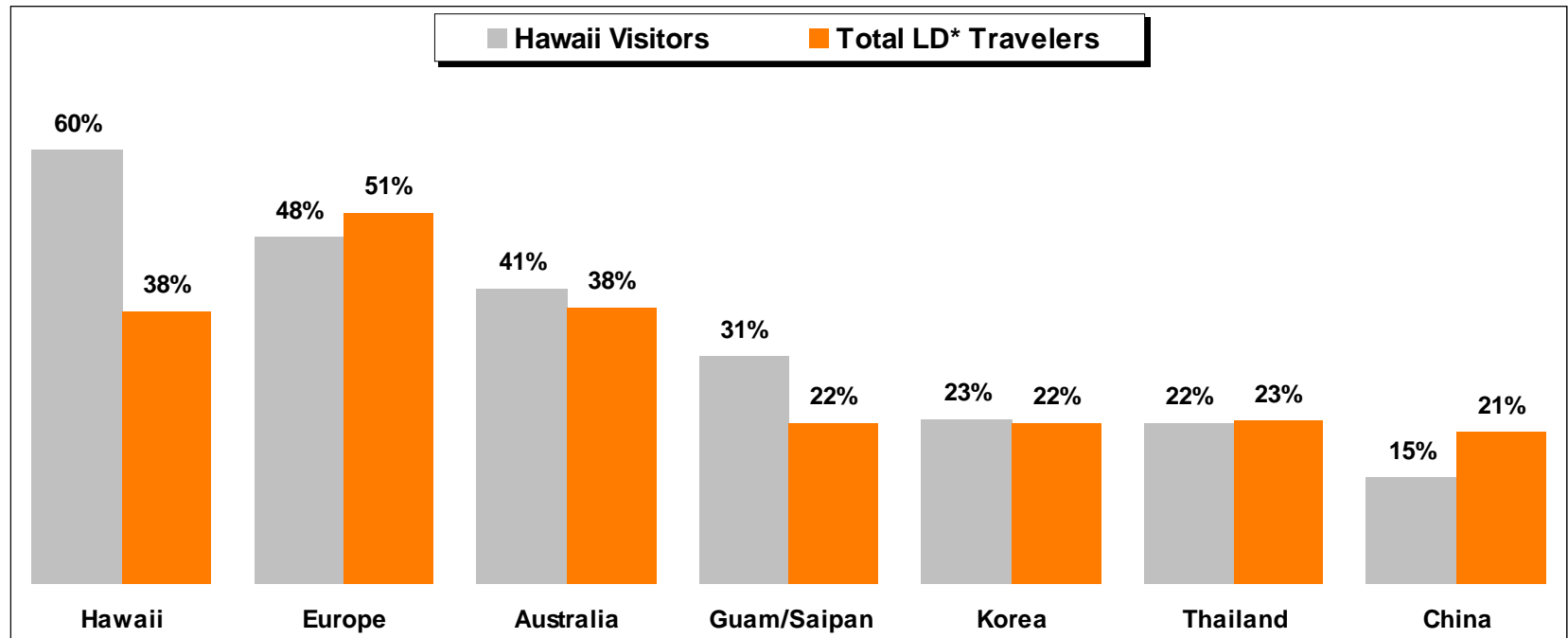
# Considered Destinations (Q3)

## Japanese Market

The ranking of the top destination choices of Japanese international travelers varies by whether they have been to Hawaii in the past or not:

- Generally, Hawaii visitors exhibit greater interest in all destinations; exceptions include Europe and China. Interest in Korea and Thailand nearly match.
- As in prior reports, Hawaii visitors still express much greater future interest in Hawaii (+22%-points over total international travelers). Although much smaller, gaps occur for other destinations as well: Europe (-3%), Australia (+3%), Guam/Saipan (+9%), and China (-6%).
- Those who have been to Hawaii want to return (60%). Europe (48%) and Australia (41%) hold strong secondary appeal.
- Europe leads among total international travelers (51%) while Australia and Hawaii vie for second place (38% each).

### YTD 2007



LD\* = Long-distance: International travelers

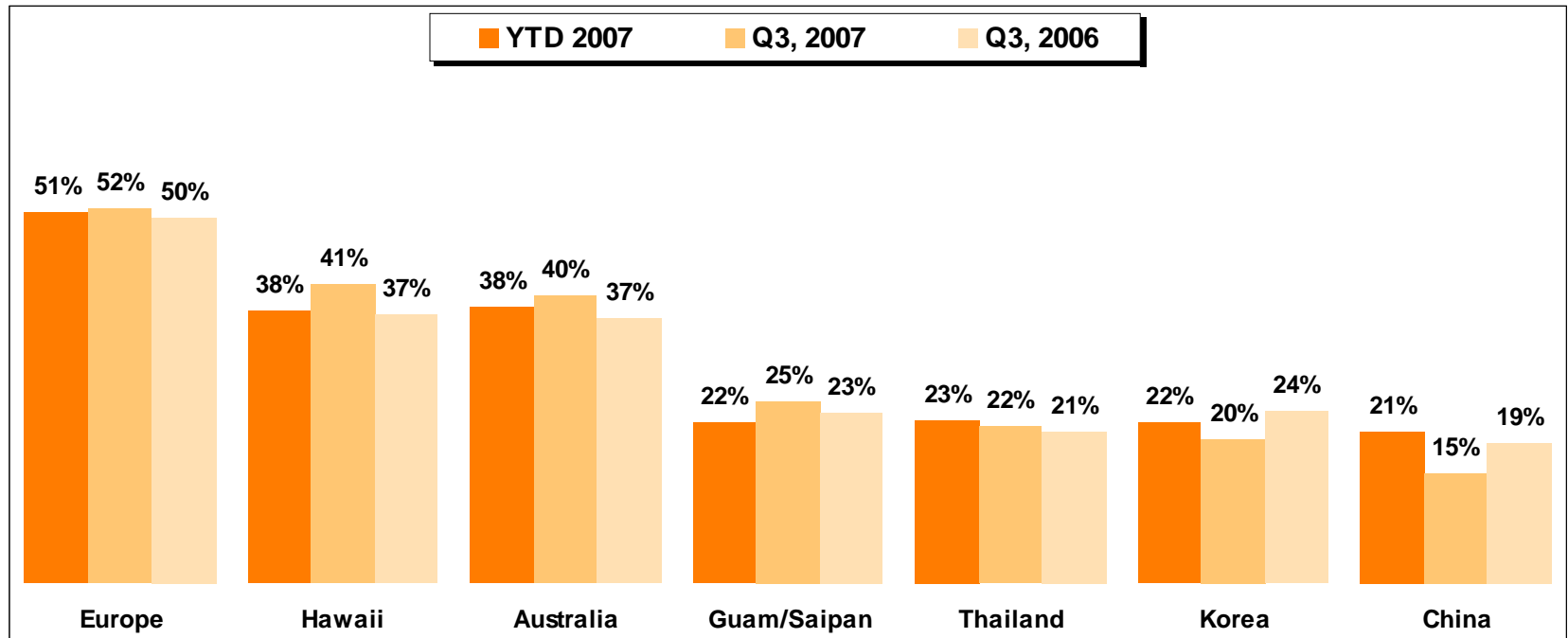
# Considered Destinations (Q3)

## Japanese Market

Quarter 3 highlights:

- Interest in Hawaii rebounds this quarter compared to the same time last year (41% from 37%). Gains also occur for Europe (52% from 50%), Australia (40% from 37%), and Guam/Saipan (25% from 23%).
- Travelers indicate decreased interest in two destinations: Korea (20% from 24%) and China (15% from 19%). Thailand remains at nearly the same level as a year ago.
- As just noted on the prior chart, YTD Europe remains the clear leader among competitive destinations, while Australia and Hawaii continue to compete for second place (38% each).

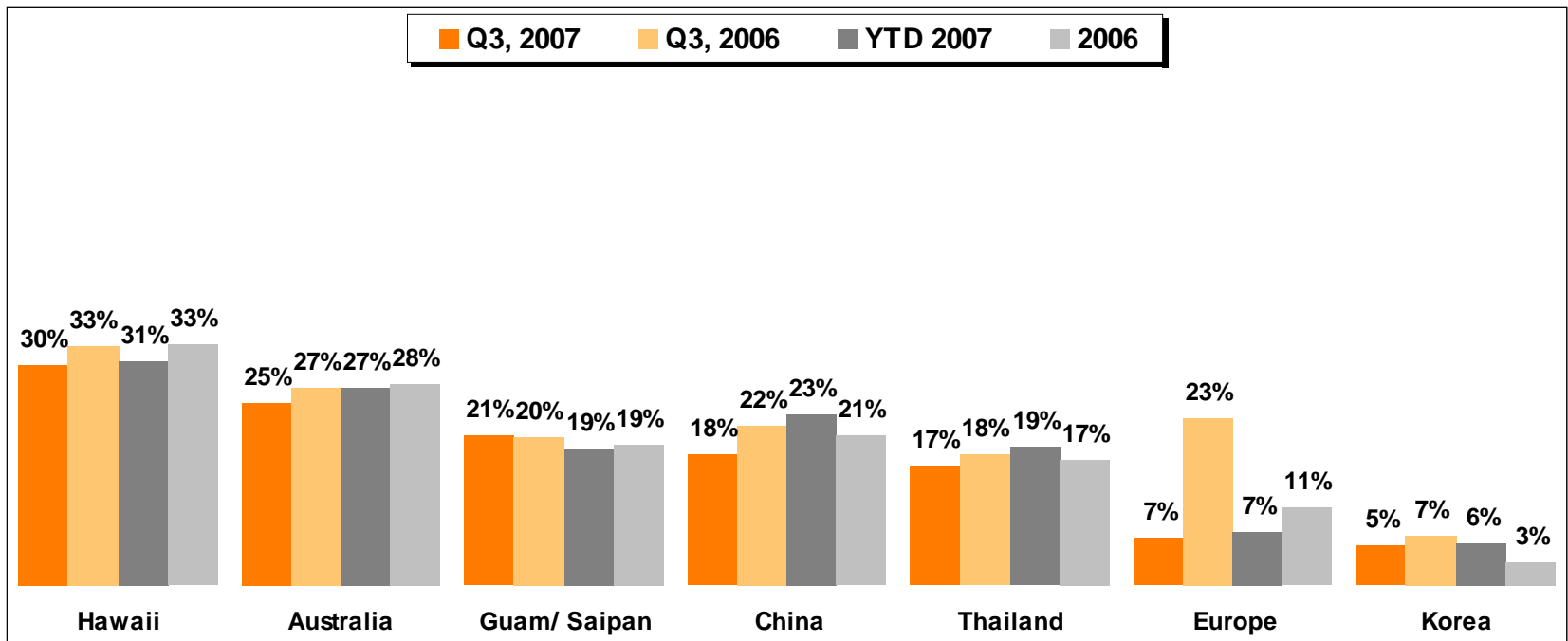
Total LD\* Travelers



\*LD=Long-distance travelers: International Trip in Past 2 Years

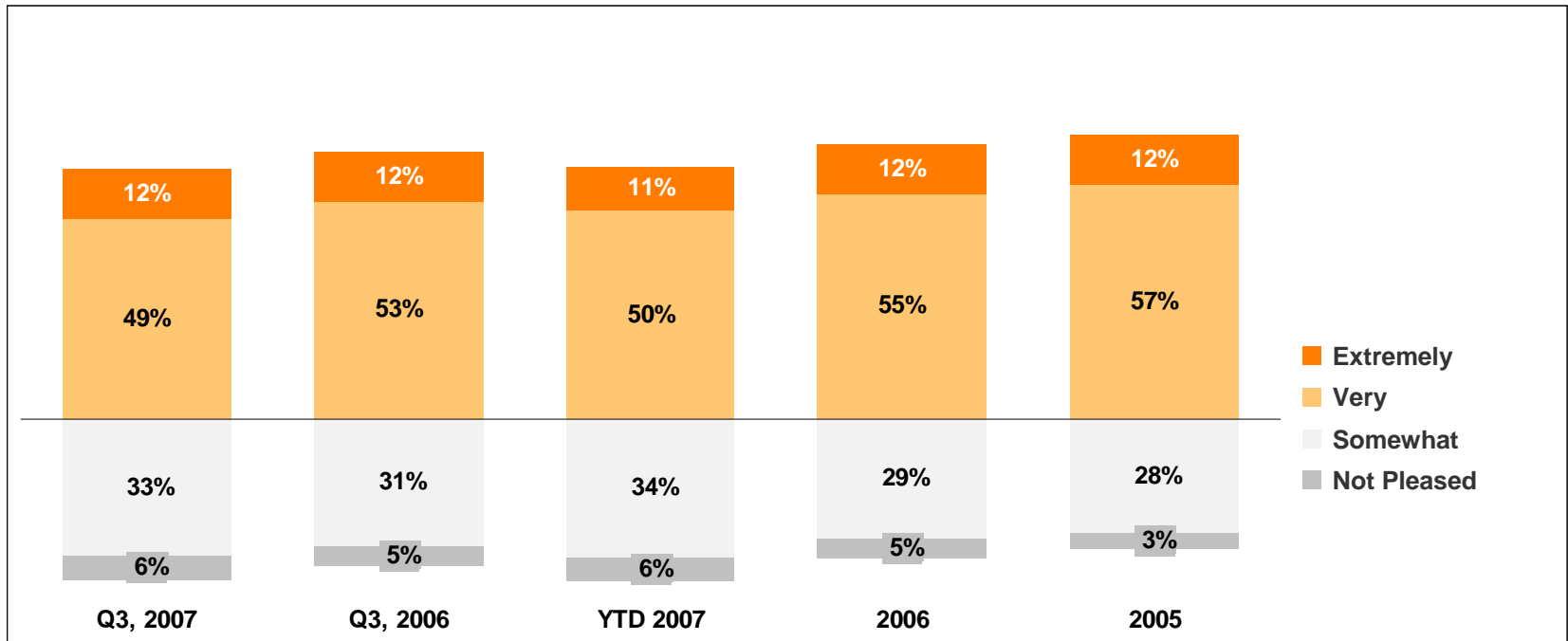
# Destinations Planned for Leisure within 24 Months (Q6)

## Japanese Market



# Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

## *Japanese Market*



# Importance of Attributes and Preferences for Hawaii and Competitors

Japanese Market



# Prefer Hawaii by Year (Q5)

## Japanese Market

### Overall:

- Hawaii gathers a strong level of preference for the attribute in the most important factor – *a great place to get away from it all*.
- Within the second most important factor, Hawaii excels as a *place where there is always more to keep coming back* and *easy to get around*, but lags, particularly, on *opportunities for new discoveries*.
- As a Unique and Unspoiled destination, travelers consider Hawaii somewhat weaker – especially on *intriguing history and culture* and *unspoiled, not over-developed*.
- The Japanese praise Hawaii for *ease of communication*. A *good place for family/children* and *clean environment* are also high. However, they do not perceive the same hospitality (*local people are friendly*) as US residents in either market.

### Great Place to Get Away

Great Place to Get Away From It All (4.16)

### Good Value/ New Discoveries

Good Value for the Money (4.27)

Always More to Keep Coming Back (4.18)

Opportunities for New Discoveries (3.90)

Easy to Get Around (3.84)

### Unique and Unspoiled

Unique Scenery Unlike Anywhere Else (4.11)

Intriguing History and Culture (4.08)

Variety of Unique Activities & Experiences (3.96)

Different Experience Than Other Places (3.95)

Unspoiled, Not Over developed (3.53)

### Clean, Safe, Family Oriented

Safe and Secure (4.37)

Variety of Types/Prices of Accommodations (3.91)

Clean Environment (3.89)

Local People Are Friendly (3.81)

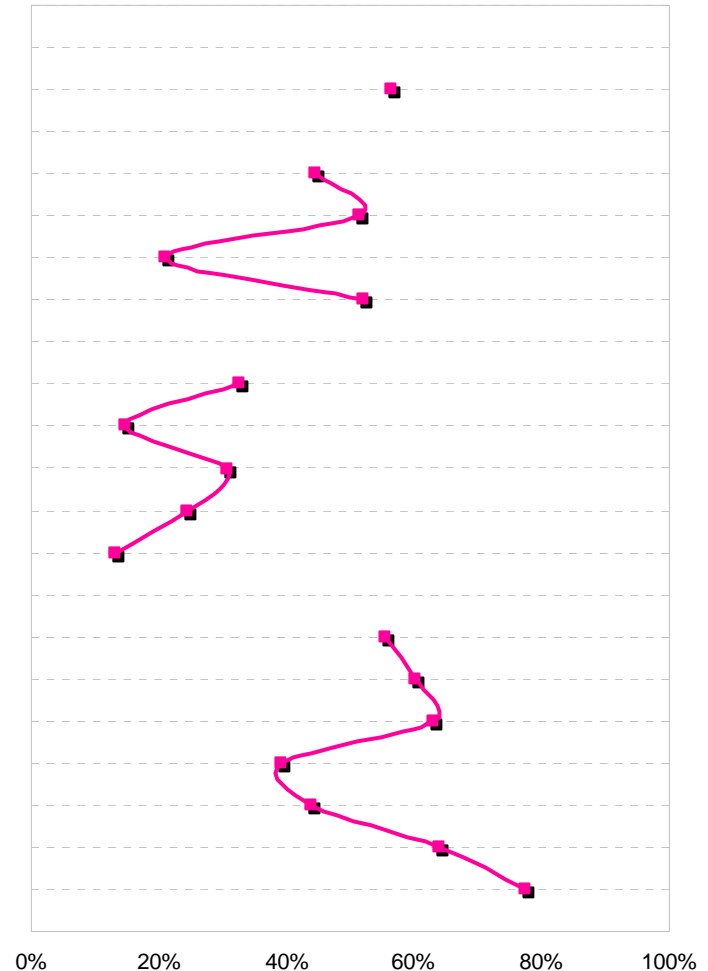
Easy to Get There (3.62)

Good Place for Family/Children (3.39)

Easy to Communicate in Native Language (3.11)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Japanese Market) Noted in Labels

—■ Hawaii Preference YTD 2007 (n=514)



# Prefer Hawaii by Year (Q5)

## Japanese Market

Overall, con't:

- The Japanese view Hawaii differently for different types of recreational choices. They believe Hawaii fits those with *active lifestyles, adventurers, golfers, and has a wide variety of choices*. However, they downgrade its *variety of cultural activities, nature-based activities, and always new experiences for the visitor*.
- Within the Social Scene factor, the Japanese think of Hawaii as a *good place to shop* and a good place for *nightlife* – neither of which are selected as often by US residents (either market).
- In another area that contrasts with US markets, the Japanese react more “lukewarmly” to Hawaii as a romantic destination (US travelers strongly prefer Hawaii on that element).
- The Japanese agree with US residents that Hawaii lags as a *great place for entertainment*.

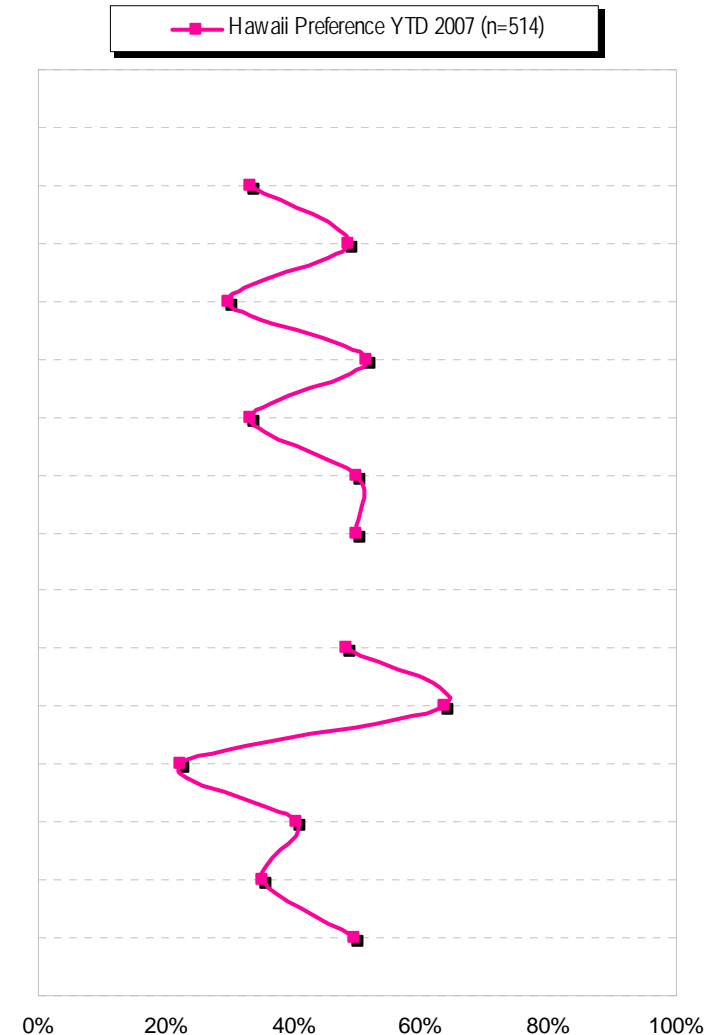
### Active Recreational Choices

Always New Experiences for the Visitor (3.46)
Many Things To Do For Active Lifestyles (3.39)
Variety of Cultural Activities (3.28)
Wide Variety of Recreational Choices (3.18)
Nature-Based Activities (3.14)
Adventure Activities (2.89)
Great Place to Golf (1.75)

### Social Scene

Variety of Cuisine/Dining Options (3.64)
Great Place for Shopping (3.33)
Great Place for Entertainment (3.23)
Romantic (3.21)
Special Events/Festivals (3.08)
Variety of Nightlife (2.66)

Hawaii Preferred (% for Each Attribute)  
Average Importance (Japanese Market) Noted in Labels



# Prefer Destination (Q5)

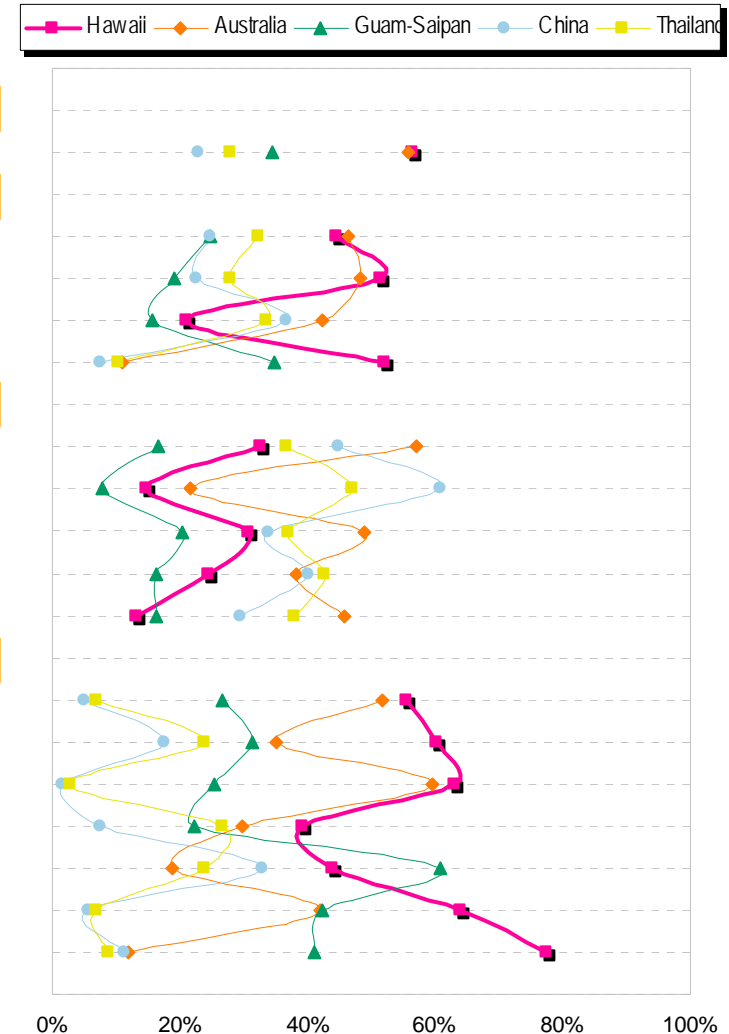
## Japanese Market

Competitively (Hawaii vs. Australia, Guam/Saipan, China, and Thailand):

- Within the most important factor, **Hawaii** and **Australia** vie for first-place (*great place to get away from it all*).
- Within the factor Good Value/New Discoveries, **Hawaii** notably wins on *easy to get around*. **Australia** and **Hawaii** closely compete on *good value* and *always more to keep coming back* (although **Hawaii** has a small edge). **Hawaii** lags on *opportunities for new discoveries*.
- For Unique and Unspoiled attributes, Hawaii always ranks fourth or fifth of the five destination choices. **Australia** leads on three of the five.
- In contrast, **Hawaii** emerges as the leader on *safe/secure*, *variety of accommodations*, *clean environment*, *friendly locals*, *good place for family/children*, and especially on *ease of communication*. **Australia** usually ranks second.
- **Guam/Saipan** leads on only one attribute in the entire battery – *easy to get there*.

Destination Preferred (% for Each Attribute)  
Average Importance (Japanese Market) Noted in Labels

Attribute	Average Importance
<b>Great Place to Get Away</b>	
Great Place to Get Away From It All	4.16
<b>Good Value/ New Discoveries</b>	
Good Value for the Money	4.27
Always More to Keep Coming Back	4.18
Opportunities for New Discoveries	3.90
Easy to Get Around	3.84
<b>Unique and Unspoiled</b>	
Unique Scenery Unlike Anywhere Else	4.11
Intriguing History and Culture	4.08
Variety of Unique Activities & Experiences	3.96
Different Experience Than Other Places	3.95
Unspoiled, Not Overdeveloped	3.53
<b>Clean, Safe, Family Oriented</b>	
Safe and Secure	4.37
Variety of Types/Prices of Accommodations	3.91
Clean Environment	3.89
Local People Are Friendly	3.81
Easy to Get There	3.62
Good Place for Family/Children	3.39
Easy to Communicate in Native Language	3.11



# Prefer Destination (Q5)

## Japanese Market

Competitively (Hawaii vs. Australia, Guam/Saipan, China, and Thailand) con't:

- Of the attributes in Active Recreational Choices, Hawaii and Australia lead on all of them: Hawaii leads on three, Australia leads on two, and they tie on two (*adventure activities* and *many things to do for active lifestyles*).
- Within the Social Scene, Hawaii clearly takes the top spot on every attribute except *great place for entertainment*, where it shares the lead with Australia.

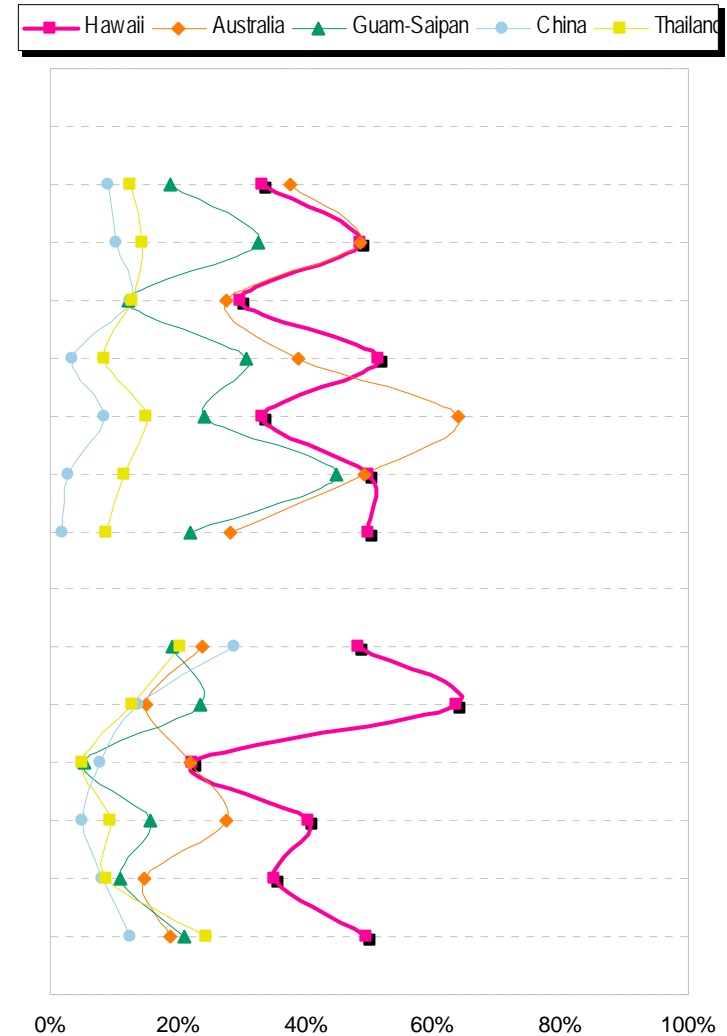
Destination Preferred (% for Each Attribute)  
Average Importance (Japanese Market) Noted in Labels

### Active Recreational Choices

Always New Experiences for the Visitor	(3.46)
Many Things To Do For Active Lifestyles	(3.39)
Variety of Cultural Activities	(3.28)
Wide Variety of Recreational Choices	(3.18)
Nature-Based Activities	(3.14)
Adventure Activities	(2.89)
Great Place to Golf	(1.75)

### Social Scene

Variety of Cuisine/Dining Options	(3.64)
Great Place for Shopping	(3.33)
Great Place for Entertainment	(3.23)
Romantic	(3.21)
Special Events/Festivals	(3.08)
Variety of Nightlife	(2.66)



# Prefer Hawaii by Spending Segments (Q5)

## Japanese Market

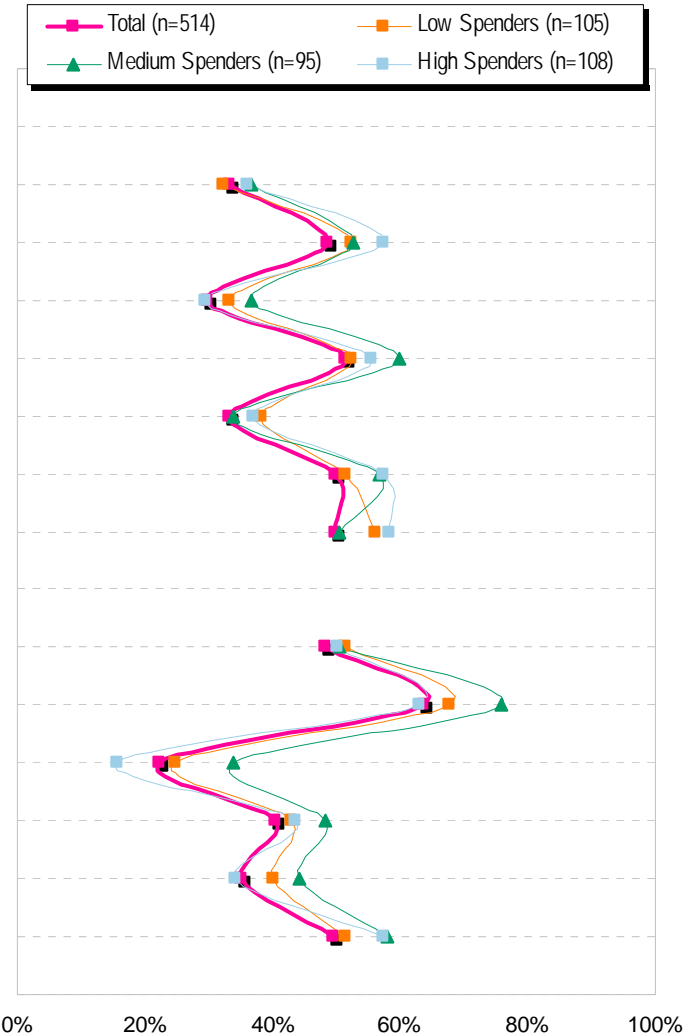
Hawaii Preferred (% for Each Attribute)  
Average Importance (Japanese Market) Noted in Labels

### Active Recreational Choices

- Always New Experiences for the Visitor (3.46)
- Many Things To Do For Active Lifestyles (3.39)
- Variety of Cultural Activities (3.28)
- Wide Variety of Recreational Choices (3.18)
- Nature-Based Activities (3.14)
- Adventure Activities (2.89)
- Great Place to Golf (1.75)

### Social Scene

- Variety of Cuisine/Dining Options (3.64)
- Great Place for Shopping (3.33)
- Great Place for Entertainment (3.23)
- Romantic (3.21)
- Special Events/Festivals (3.08)
- Variety of Nightlife (2.66)



# Appendix A: Demographics and Overall Travel Patterns All Markets



# Hawaii Visitors vs. Total Travelers

## Demographics

	Total All LD* Respondents		Hawaii Visitors Past 3 Years				
	Total 2006	YTD 2007	Q3: Jul-Sep 06	Q4: Oct-Dec 06	Q1: Jan-Mar 07	Q2: Apr-Jun 07	Q3: Jul-Sep 07
<b>EASTERN US</b>							
Median Age	51	51	58	58	59	50	53
Median Income	\$58,500	\$58,800	\$52,500	\$53,800	\$63,800	\$76,400	\$66,700
# LD* Trips Annually	2.5	2.5	2.9	3.0	3.6	2.5	2.5
<b>WESTERN US</b>							
Median Age	49	50	51	52	52	51	51
Median Income	\$59,800	\$57,200	\$67,800	\$67,500	\$67,500	\$69,400	\$70,600
# LD* Trips Annually	2.7	2.7	3.5	3.1	3.5	3.9	3.4
<b>JAPAN</b>							
Median Age	48	51	50	48	50	53	52
Median Income	\$57,400	\$59,200	\$69,000	\$66,200	\$64,000	\$64,700	\$67,600
# Int'l Trips Past 2 Years	2.2	2.2	2.7	2.4	2.5	2.8	2.8

\*LD=Long-distance travelers: US=500+ Mile Air Trip in Past 12 Months; Japan=International Trip in Past 2 Years

# Appendix E: Factor Definitions and Components



# Importance Factors (Q5)

## *US Market*

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The following two charts present the results from the factor analysis prepared from the importance of attributes assigned by respondents when selecting a destination (developed from total 2003 surveys).

The factors were prepared for the US and Japan separately to allow for cultural variances. They are listed in order of the importance of the factors.

The primary attributes for each factor are shown and are listed in the rank order of their “loading” score.

The importance score shown in parentheses is the importance of the primary attributes weighted by their loading scores to the factor.

# Importance Factors (Q5) (cont'd)

## *US Market*

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**Easy, Value, Safe, Clean (4.0):** Easy to get there, good value for money, easy to get around, safe/secure, clean environment, variety of types/prices of places to stay

**Unique and Unspoiled (3.7):** Unique scenery unlike anywhere else, unspoiled and not over-developed

**New Discoveries/Unique (3.5):** Opportunities for new discoveries, variety of cultural activities, always new activities, more to “come back for,” intriguing history/culture, variety of unique experiences, different experience than other places

**Good for Family/Friendly (3.3):** Good for family/children, local people are friendly

**Social Scene (3.2):** Romantic, variety of nightlife, place to “get away from it all,” cuisines and dining options

**Active Recreational Choices (2.8):** Adventure activities; nature activities, wide variety of recreational activities

**Events & Entertainment (2.7):** Special events/festivals, entertainment (theatre, concerts, galleries), shopping

**Golfing (1.6):** Great place to golf

# Importance Factors (Q5) (cont'd)

## *Japanese Market*

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**Great Place to Getaway (4.2):** Great place to “get away from it all”

**Good Value/New Discoveries (4.1):** Good value for the money, more to “come back for,” opportunities for new discoveries, easy to get around

**Unique and Unspoiled (3.9):** Unique scenery unlike anywhere else, intriguing history/culture, unspoiled and not over-developed, different experience than other places, variety of unique experiences

**Clean, Safe, Family Oriented (3.7):** Clean environment, safe and secure, good for family/children, easy to communicate in native language, variety of types/prices of places to stay, easy to get there, local people are friendly

**Active Recreational Choices (2.8):** Nature activities, always new activities, adventure activities, many things to do for active lifestyles, variety of cultural activities, wide variety of recreational activities, great place to golf

**Social Scene (2.8):** Variety of nightlife, entertainment (theatre, concerts, galleries), cuisines and dining options, romantic, special events/festivals, shopping

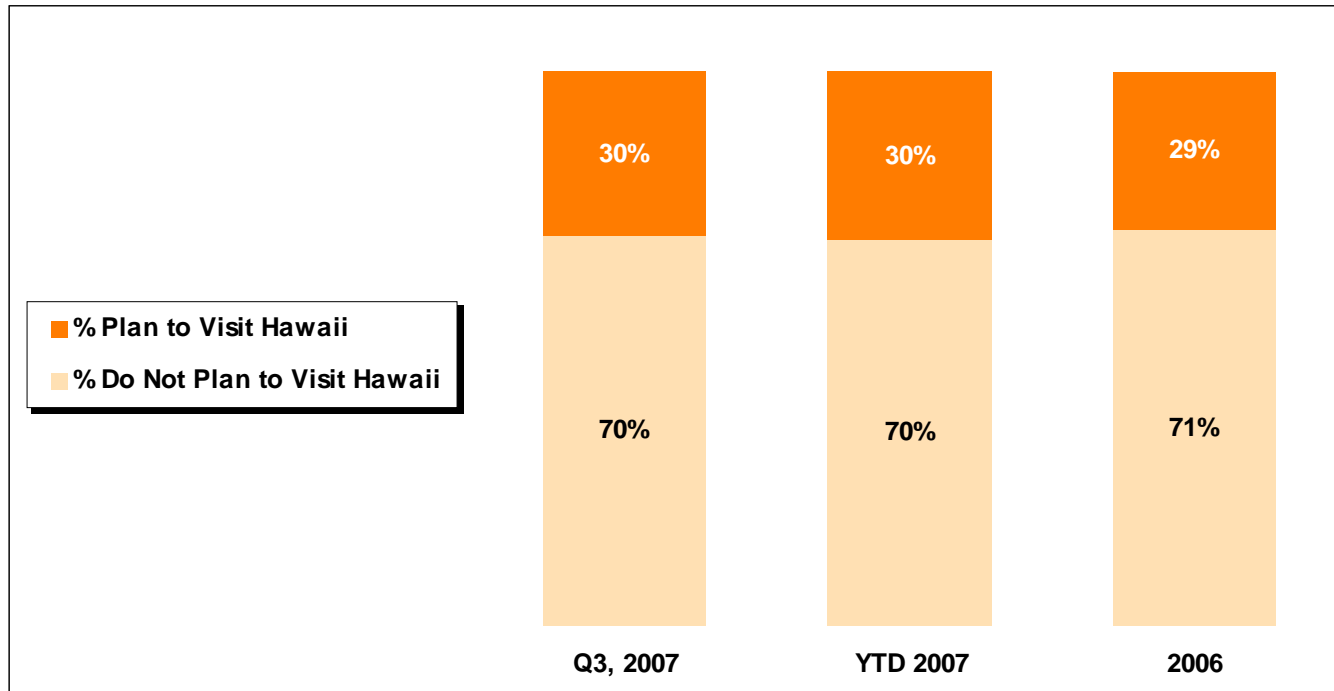
# Appendix G: Concerns About Travel and Their Effect on Destination Choices (Japanese Int'l Travelers Only)



# Consider Visiting Hawaii in Next 24 Months (Q21)

## *Japanese Market*

- Nearly a third (30%) of Japanese respondents consider visiting Hawaii in the next 24 months (based to those who answer in Q1/Q2/Q3), representing virtually no change from Q3/Q4, 2006.
- The most recent quarter matches the year-to-date results (30%).

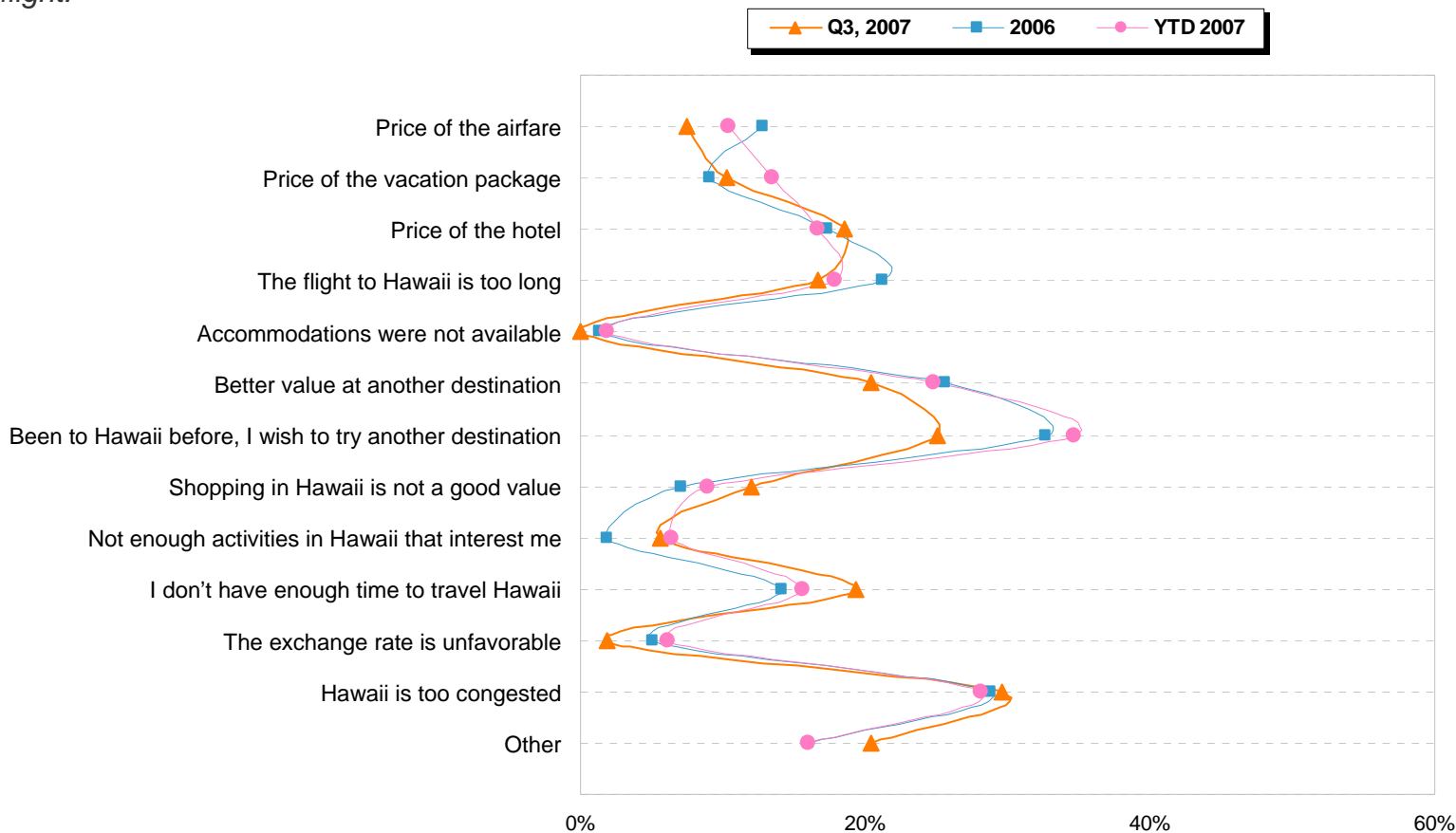


2006 represents only Q3 and Q4 since the new question was added in Q3.

# Reasons Not Intending to Visit Hawaii in Next 24 Months (Q22)

## Japanese Market

- Quarter 3, 2007: Of those (21%) Japanese travelers considering a visit to Hawaii in the next 24 months, but not *intending* to visit, the top reason is that they feel that *Hawaii is too congested* (30%). While similar to prior waves (28% YTD), this reason leads this quarter because fewer indicate that they have *been to Hawaii before and wish to try another destination* (25% vs. 35% YTD). *Better value at another destination* ranks third in both the quarter and YTD (20% Q3; 25% YTD).
- YTD 2007 vs. YTD (Q3/Q4) 2006: Generally, both time periods reflect the same patterns, although current non-intenders complain more about *the price of the vacation package* and *not enough activities* and *complain less about the length of the flight*.

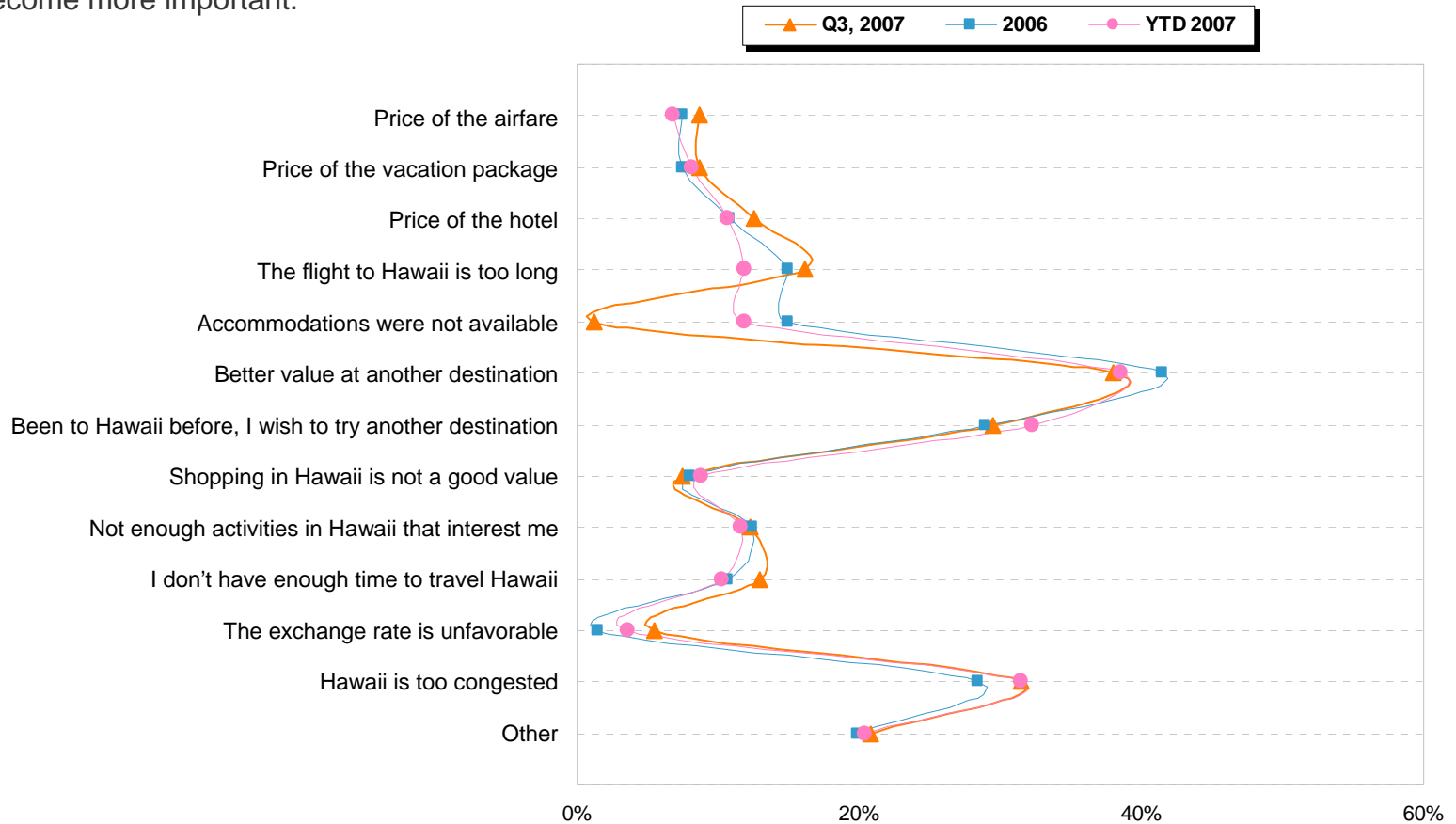


2006 represents only Q3 and Q4 since the new question was added in Q3.

# Reasons Not Considering a Visit to Hawaii in Next 24 Months (Q23)

## Japanese Market

- Quarter 3, 2007: Japanese travelers who are not considering a visit to Hawaii typically believe that they will discover a *better value at another destination* (38%). They also resist *congestion* (31%); this swaps positions with *been there before* (29%) and now ranks second.
- YTD 2007 vs. YTD (Q3/Q4) 2006: The patterns diverge somewhat between years. While *better value elsewhere* still tops the list, current “non-considerers” deem it less important than a year ago, along with *length of flight* and *available accommodations*. Already ranking second and third, *have been there before* and *Hawaii’s congestion* become more important.



2006 represents only Q3 and Q4 since the new question was added in Q3.



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