HAWAI’I MARKETING EFFECTIVENESS

2015-2018 – WAVE 5/6

(INCLUDES 2014-2016 – WAVE 1/2 AND WAVE 2/2; 2015-2018 – WAVE 1/6, WAVE 2/6, WAVE 4/6)

(NOV 2017)
<table>
<thead>
<tr>
<th>Section</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURPOSE AND METHODOLOGY</td>
<td>3</td>
</tr>
<tr>
<td>REPORT STRUCTURE</td>
<td>9</td>
</tr>
<tr>
<td>EXECUTIVE SUMMARY</td>
<td>11</td>
</tr>
<tr>
<td>CHARTS - SUMMARY – ALL MARKETS</td>
<td>14</td>
</tr>
<tr>
<td>CHARTS - EASTERN U.S. MARKET</td>
<td>48</td>
</tr>
<tr>
<td>CHARTS - WESTERN U.S. MARKET</td>
<td>194</td>
</tr>
<tr>
<td>CHARTS - CANADIAN MARKET</td>
<td>340</td>
</tr>
<tr>
<td>CHARTS - JAPANESE MARKET</td>
<td>486</td>
</tr>
</tbody>
</table>
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, Korea, Europe, Taiwan, Singapore, Thailand, Hong Kong)

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
Online surveys of approximately 15 minutes in length conducted in November 2015, March 2016 and November 2016, March 2017 and November 2017. 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.**
  - 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
Purpose and Methodology

- 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 2018 and March 2019 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:

<table>
<thead>
<tr>
<th>Marketing Area</th>
<th>Completes</th>
<th>Expected Re-Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern U.S.</td>
<td>603</td>
<td>602</td>
</tr>
<tr>
<td>Western U.S.</td>
<td>600</td>
<td>600</td>
</tr>
<tr>
<td>Canada</td>
<td>601</td>
<td>601</td>
</tr>
<tr>
<td>Japan</td>
<td>606</td>
<td>600</td>
</tr>
</tbody>
</table>
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. Following are the definitions for each segment. Respondents must have provided a rating of 4 or 5 for at least one characteristic in each segment.

*Segments were revised with Wave 1 in November 2015, thus no prior wave data is presented.*

**Purpose and Methodology**
**RESEARCH OBJECTIVES**

Inclusion in each segment is based on the responses for each attribute within the segment, thus a respondent may respond to more than one characteristic across multiple segments. Therefore, while the response is counted only once, the respondent may be counted multiple times. Sample sizes for each segment are shown in the table below.

<table>
<thead>
<tr>
<th></th>
<th>Eastern U.S.</th>
<th>Western U.S.</th>
<th>Canada</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Explore/Learn</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>509</td>
<td>511</td>
<td>482</td>
<td>487</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>503</td>
<td>490</td>
<td>497</td>
<td>495</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>514</td>
<td>519</td>
<td>471</td>
<td>478</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>486</td>
<td>498</td>
<td>488</td>
<td>466</td>
</tr>
<tr>
<td><strong>Relax/Re-energize</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>521</td>
<td>496</td>
<td>536</td>
<td>520</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>518</td>
<td>511</td>
<td>538</td>
<td>519</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>541</td>
<td>541</td>
<td>513</td>
<td>505</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>535</td>
<td>513</td>
<td>542</td>
<td>509</td>
</tr>
<tr>
<td><strong>Culture/Authenticity</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>499</td>
<td>506</td>
<td>477</td>
<td>500</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>487</td>
<td>493</td>
<td>487</td>
<td>497</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>491</td>
<td>524</td>
<td>481</td>
<td>495</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>470</td>
<td>490</td>
<td>482</td>
<td>473</td>
</tr>
</tbody>
</table>
**RESEARCH OBJECTIVES**

Inclusion in each segment is based on the responses for each attribute within the segment, thus a respondent may respond to more than one characteristic across multiple segments. Therefore, while the response is counted only once, the respondent may be counted multiple times. Sample sizes for each segment are shown in the table below.

<table>
<thead>
<tr>
<th>Activity/Nature</th>
<th>Eastern U.S.</th>
<th>Western U.S.</th>
<th>Canada</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOV 2017</td>
<td>479</td>
<td>493</td>
<td>465</td>
<td>447</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>740</td>
<td>472</td>
<td>477</td>
<td>415</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>502</td>
<td>518</td>
<td>460</td>
<td>421</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>488</td>
<td>459</td>
<td>475</td>
<td>419</td>
</tr>
<tr>
<td>Foodie</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>260</td>
<td>260</td>
<td>250</td>
<td>425</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>274</td>
<td>226</td>
<td>256</td>
<td>420</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>328</td>
<td>335</td>
<td>236</td>
<td>422</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>242</td>
<td>274</td>
<td>237</td>
<td>414</td>
</tr>
<tr>
<td>Togetherness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>510</td>
<td>480</td>
<td>496</td>
<td>469</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>509</td>
<td>495</td>
<td>502</td>
<td>471</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>524</td>
<td>527</td>
<td>479</td>
<td>459</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>498</td>
<td>486</td>
<td>488</td>
<td>454</td>
</tr>
<tr>
<td>Indulge</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 2017</td>
<td>271</td>
<td>250</td>
<td>240</td>
<td>414</td>
</tr>
<tr>
<td>MAR 2017</td>
<td>260</td>
<td>246</td>
<td>262</td>
<td>398</td>
</tr>
<tr>
<td>NOV 2016</td>
<td>333</td>
<td>355</td>
<td>226</td>
<td>410</td>
</tr>
<tr>
<td>MAR 2016</td>
<td>246</td>
<td>247</td>
<td>252</td>
<td>389</td>
</tr>
</tbody>
</table>
Results Presentation

Data will be presented in five major sections. The first section includes a Summary of the current Wave (NOV 2017), 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 of the past 7 waves (NOV 2014, MAR 2015, NOV 2015, MAR 2016, NOV 2016, MAR 2017 and NOV 2017) separately, except for Destination Attributes as they apply to Hawai’i specifically. For these charts, data is presented for all waves back to Q2 of 2009. 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 – Sexual Orientation
• 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)
• Attributes Important in Choosing a Destination – Segment Comparisons
• Destination Attributes – Competitive Comparisons (*competitive destinations vary by market*)
• Destination Attributes – Applies to Hawai‘i
• Impression of Hawai‘i
• Impression of Hawai‘i by Segment
• Hawai‘i Visitation by Segment
• Hawai‘i Planned Visitation by Segment
• Visitation – Competitive Destinations
• Planned Visitation – Competitive Destinations
• Planned Visitation to Islands of Hawai‘i
• Planned Accommodations
• Planned Accommodation Location
• 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
• Number of Nights in Hawai‘i
• Average Spending in Hawai‘i
• Travel Party Size
• Travel Party Composition
• Hawai‘i Excellent Rating
• Likelihood of Returning to Hawai‘i
The age distribution was almost unchanged for the Eastern and Western travelers, at 48 and 47 respectively. Both were at 48 in the spring. At 49 years, Canadian travelers were older in this study than they were in the Spring where they were two years younger at 47. The Japanese travelers remained fairly consistent at 45 years, up only one year over the Spring travelers.

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. In Japan, incomes for travelers declined compared to the Spring. The incomes of Eastern U.S., Western U.S. and Canadian travelers remained unchanged.

The percentage of LGBT travelers remains low, but has risen among all groups except Western U.S. travelers. In the current wave LGBT travelers are more likely to come from the United States.

Travelers in this study claim to have taken at least 2 long distance overnight trips in the past 12 months, but those from the Western U.S. have taken the most with an average of 3.02, followed by the Eastern U.S. at 2.62 trips. The number of trips taken increased across all geographies, except for Japan.

Hawai‘i is in the most considered leisure destination among all but Eastern U.S. a move up from number two for both Canada and Japan. Among Eastern U.S. travelers Hawai‘i has moved up from number six to number 4 in consideration behind Florida, California, and the Caribbean.

The top reasons U.S. residents travel continues to be to explore and do new things and to spend more quality time with their spouses or families. Both Canadian and Japanese travelers consider travel as a chance to rest and relax. Canadians also like to explore and do new things, while Japanese travelers like to indulge in fine cuisine.
Executive Summary

Among the 20 attributes (22 for the Japan market) important in choosing a leisure destination, the most important reason among all visitors is that it is a safe and secure place. This is ranked as number one by over 80% of Canadians and Eastern U.S. travelers and 79% and 69% by Japanese and Western U.S. travelers respectively. For all visitors, excluding those from Japan, Hawai‘i meets exceeds expectations as being a romantic place to visit.

While there is variance among the markets, most have the consistent impression that Hawai‘i has quality State/National parks and beaches and that the State delivers high levels of recreational activities (including water sports, zip lining, snorkeling, hiking, biking, etc.), and relaxation and romance. Shopping also continues to be rated highly among the Japanese market.

About 20% of visitors from the Western U.S. and Japanese origins have visited Hawai‘i in the past 12 months with an additional 20% to 10% visiting in the past 24-36 months. Only 1% of Eastern U.S. visitors have visited in the past 12 months, a decrease from the last wave, with an additional 12% visiting the past 24-36 months. The percentage of Canadian visitors who have visited in the past 12 months remained increased slightly to 15%, while those visiting in the past 24-36 months have increased from 16% to 19%.

More than one-third of visitors from the Western U.S and Japan plan to visit Hawai‘i in the next 12 months with an additional 15% and 5% planning to visit in the next 13-24 months. About 28% of Canadian and 18% of Eastern U.S. travelers plan to visit in the next 12 months. The primary reason Eastern U.S. visitors seem to be lagging behind the other markets is that they think they can get a better value at another destination as well as the price of the vacation package. Canadian travelers who are not planning to visit Hawai‘i also think they can get a better value at another destination and that they have been to Hawai‘i before and would like to try another destination.

Visitors from the Eastern U.S. are least likely to visit Hawai‘i in the Fall, while those from the Western U.S. and Japan prefer Summer. Canadians continue to overwhelmingly prefer to visit Hawai‘i in the Winter, followed by Spring. Less than 20% of Canadian travelers visit in the Summer or Fall.
Executive Summary

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 O’ahu. This is likely due to their high opinions of the shopping in Hawai’i.

Visitors from all markets primarily plan to stay in a hotel. It is not surprising that the overwhelming majority of all traveler groups plan to stay at a resort location. All groups are venturing out with more of them reporting planned accommodations in non-resort localities.

As might be expected, at five visits, travelers from the Western U.S. have made the most lifetime visits to Hawai’i, followed by Canadian and Japanese visitors at almost four lifetime visits. Visitors from the Eastern U.S. have only made just under 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 a safe place to visit, especially those from Canada.

The majority of travel parties from each origin are couples followed by families.

At about $4,800, visitors from the Eastern U.S. spent the most on their last trip to Hawai’i an increase over the previous wave. This is likely due to transportation costs, which like Japan account for 30% of their travel dollar. Spending among Japanese travelers also increased, but spending has decreased among travelers from the Western U.S. and Canada.

Visitors from all four markets rate their last visit to Hawai’i higher than 6 on an excellence scale of 8 and between 17% and 32% say they are very likely to return in the next 24 months. About two thirds of Western U.S. and Canadian visitors say they are somewhat or very likely to return to Hawai’i in the next 24 months, while almost 40% of Japanese visitors claim they are likely to return in the next 24 months.
Q53. Which of the following categories includes your age?
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) $142,000
- **Western U.S.** (U.S. Dollars) $141,000
- **Canada** (Canadian Dollars) $133,000
- **Japan** (Japanese Yen) ¥852

Travelers to Hawai‘i tend to be more affluent as their Average Annual Household Incomes exceed the national averages in each of their countries. It is interesting to note, however, that, excluding Japan, incomes have remained constant for at least the past 3 years.

QS4. Which of the following categories includes your total household income?
Q55. Do you consider yourself to be: LGBT, Heterosexual, Prefer not to answer
Q1. How many overnight leisure trips of 500 miles or more have you taken by air in the past 12 months?
### Destination Consideration for Next Leisure Vacation

<table>
<thead>
<tr>
<th>Eastern U.S.</th>
<th>Western U.S.</th>
<th>Canada</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Florida (36%)</td>
<td>1. Hawai’i (44%)</td>
<td>1. Hawai’i (34%)</td>
<td>1. Hawai’i (33%)</td>
</tr>
<tr>
<td>2. Caribbean (35%)</td>
<td>2. Alaska (26%)</td>
<td>2. Europe (34%)</td>
<td>2. Europe (31%)</td>
</tr>
<tr>
<td>3. California (31%)</td>
<td>3. Las Vegas (26%)</td>
<td>3. Mexico (33%)</td>
<td>3. Australia (29%)</td>
</tr>
<tr>
<td><strong>4. Hawai’i (24%)</strong></td>
<td>4. Other Europe (24%)</td>
<td>4. California (31%)</td>
<td>4. Taiwan (25%)</td>
</tr>
<tr>
<td>5. Other Europe (22%)</td>
<td>5. Caribbean (23%)</td>
<td>5. Caribbean (26%)</td>
<td>5. Singapore (17%)</td>
</tr>
<tr>
<td>6. U.K. (21%)</td>
<td>6. Mexico (23%)</td>
<td>6. Las Vegas (23%)</td>
<td>6. Hong Kong (14%)</td>
</tr>
<tr>
<td>7. Italy (19%)</td>
<td>7. U.K. (21%)</td>
<td>7. Florida (15%)</td>
<td>7. Korea (13%)</td>
</tr>
<tr>
<td>8. Las Vegas (18%)</td>
<td>8. Italy (19%)</td>
<td>8. Arizona (14%)</td>
<td>8. Thailand (11%)</td>
</tr>
<tr>
<td>10. Mexico (14%)</td>
<td>10. Australia (16%)</td>
<td>10. Other (25%)</td>
<td>10. China (9%)</td>
</tr>
<tr>
<td>11. Germany (11%)</td>
<td>11. Germany (15%)</td>
<td>No Trip Considered (4%)</td>
<td>11. Other (9%)</td>
</tr>
<tr>
<td>12. Costa Rica (10%)</td>
<td>12. Costa Rica (13%)</td>
<td>No Trip Considered (4%)</td>
<td>No Trip Considered (6%)</td>
</tr>
<tr>
<td>13. Switzerland (10%)</td>
<td>13. Switzerland (10%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Cuba (5%)</td>
<td>14. Other (20%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Puerto Rico (4%)</td>
<td>No Trip Considered (5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Other (24%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Trip Considered (4%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)
### Reasons for Taking a Leisure Vacation Anywhere (Cont.) (% Top 2 Box)

<table>
<thead>
<tr>
<th>Activity/Nature</th>
<th>Eastern U.S.</th>
<th>Western U.S.</th>
<th>Canada</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>To do activities I can only do on vacation</td>
<td>66%</td>
<td>60%</td>
<td>59%</td>
<td>62%</td>
</tr>
<tr>
<td>To be outdoors and experience nature</td>
<td>54%</td>
<td>48%</td>
<td>55%</td>
<td>60%</td>
</tr>
<tr>
<td>To seek adventure</td>
<td>42%</td>
<td>57%</td>
<td>53%</td>
<td>59%</td>
</tr>
<tr>
<td>Foodie</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To indulge my passion for food and fine cuisine</td>
<td>49%</td>
<td>51%</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Togetherness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To spend more quality time with my spouse/family</td>
<td>75%</td>
<td>71%</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>To spend more time with my friends</td>
<td>41%</td>
<td>37%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>To celebrate or mark a special occasion</td>
<td>52%</td>
<td>46%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Indulge</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can splurge on myself when I travel</td>
<td>45%</td>
<td>41%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>I can be more extravagant when I travel</td>
<td>55%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)
Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)
Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)
**Attributes Important in Choosing a Destination (Cont.) (% Top 2 Box)**

- **Offers consistent/dependable experiences***
  - Eastern U.S.: 63%
  - Western U.S.: 58%
  - Canada: 66%
  - Japan: 67%

- **It offers quality culinary and dining experiences**
  - Eastern U.S.: 58%
  - Western U.S.: 58%
  - Canada: 56%
  - Japan: 72%

- **It is easy to get there**
  - Eastern U.S.: 47%
  - Western U.S.: 55%
  - Canada: 62%
  - Japan: 68%

- **It’s a good place for family and children**
  - Eastern U.S.: 34%
  - Western U.S.: 48%
  - Canada: 42%
  - Japan: 61%

- **Offers experiences with native people and their cultures***
  - Eastern U.S.: 54%
  - Western U.S.: 50%
  - Canada: 59%
  - Japan: 59%

- **It is romantic**
  - Eastern U.S.: 37%
  - Western U.S.: 38%
  - Canada: 35%
  - Japan: 52%

- **It is a great place for shopping***
  - Eastern U.S.: 50%
  - Western U.S.: 35%
  - Canada: 38%
  - Japan: 52%

- **It is easy to communicate in my native language (bilingual)***
  - Eastern U.S.: 48%
  - Western U.S.:
  - Canada: 47%
  - Japan: 55%

**Q5a**: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)

*Asked of Japan Only  * Added in NOV 2015
Hawai’i Performance on Attributes Important in Choosing a Destination (% Top 2 Box)

- **It is romantic**
  - Eastern U.S.: 51%
  - Western U.S.: 62%
  - Canada: 58%
  - Japan: 58%

- **It provides a sense of relaxation, a place to unwind and get re-energized**
  - Eastern U.S.: 35%
  - Western U.S.: 58%
  - Canada: 59%
  - Japan: 63%

- **It has unique scenery unlike anywhere else**
  - Eastern U.S.: 37%
  - Western U.S.: 57%
  - Canada: 57%
  - Japan: 55%

- **It is a safe and secure place**
  - Eastern U.S.: 44%
  - Western U.S.: 60%
  - Canada: 53%
  - Japan: 50%

- **It is a great place to get away from it all**
  - Eastern U.S.: 44%
  - Western U.S.: 59%
  - Canada: 51%
  - Japan: 55%

- **The environment is clean**
  - Eastern U.S.: 52%
  - Western U.S.: 51%
  - Canada: 51%
  - Japan: 58%

- **Offers authentic experiences**
  - Eastern U.S.: 46%
  - Western U.S.: 44%
  - Canada: 44%
  - Japan: 44%

Q6a: For each attribute, please select the destination(s) to which it applies.
HAWAI‘I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)

- There are always opportunities to discover new activities and experiences that make you want to return again and again
- It has a variety of unique experiences and activities
- The local people are friendly
- It offers quality culinary and dining experiences
- It offers a different experience than other places
- Offers experiences with native people and their cultures*
- The history and culture are intriguing

Q6a: For each attribute, please select the destination(s) to which it applies.

* Added in NOV 2015
HAWAI’I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)

Q6a: For each attribute, please select the destination(s) to which it applies.

^ Asked of Japan Only  * Added in NOV 2015
Q7a: Please indicate your impression of how well Hawai’i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).
Q7a: Please indicate your impression of how well Hawai‘i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).
Q8a/b: Please indicate whether or not you visited each of the following destinations for leisure within the PAST 3 YEARS/PAST 12 MONTHS.
Q9a/b: Please tell us for each of the following destinations whether or not you plan to visit them for leisure within the NEXT 24 MONTHS/NEXT 12 MONTHS.
Q9c: You indicated that you are planning to visit Hawai’i in the next 24 months. Which islands do you plan to visit?
Q9d: You indicated that you are planning to visit Hawai‘i in the next 24 months. What type of accommodation(s) do you plan to stay?

*Asked starting in MAR 2015
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
Q10: Earlier you indicated that you had considered Hawai’i for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawai’i in the next 24 months?

Note: Sample sizes for this question are very small; use data with proper caution.
Q10: Earlier you indicated that you had considered Hawai’i for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawai’i in the next 24 months?

*Asked starting in DEC 2016   **Asked starting in MAR 2017  ^Only asked of the Japanese Market  +Only asked of the Canadian Market

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)

- U.S. attitudes towards foreigners**:+ 11% (15%)
- Not enough activities in Hawai’i that interest me* 0% (1%)
- I have not seen advertising for Hawai’i* 0% (3%)
- Too difficult to visit islands other than O’ahu^ 7% 2%
- The exchange rate is unfavorable^ 2%
- Safety concerns (crime/natural disasters, etc.)^ 5%
- Hawai’i is not a popular destination^ 0%
- Family/friends/co-workers said not to go^ 2%

Q10: Earlier you indicated that you had considered Hawai’i for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawai’i in the next 24 months?

*Asked starting in DEC 2016  **Asked starting in MAR 2017  ^Only asked of the Japanese Market  +Only asked of the Canadian Market

Note: Sample sizes for this question are very small; use data with proper caution
Q11: How many times have you visited Hawai‘i in your lifetime?
Q12: Which of the following reasons best explains why you keep returning to Hawai’i?

- It has stunning natural beauty
- Always great weather
- Beaches are great
- It is safe
- I love to experience the culture
- It's familiar and I know my way around
- Food and dining options
- To participate in an event or a festival
Q12: Which of the following reasons best explains why you keep returning to Hawai’i?
Q13a: What was the YEAR of your LAST VISIT to Hawai‘i?
Q13b: What was the MONTH of your LAST VISIT to Hawai‘i?
Q16c: Including yourself, how many people were in your travel party on your most recent leisure trip to Hawai’i?
Q18: In the next 24 months how likely are you to take a vacation or pleasure trip to Hawai‘i?