MARKETING EFFECTIVENESS STUDY: 2014 – 2015
WAVE 1 REPORT

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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
Purpose and Methodology

An online survey of approximately 15 minutes in length was conducted between October 27, 2014 and November 3, 2014. 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
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 to determine if a trip was actually made. Actual re-contacts may be lower than reported here due to attrition in the panel.

Wave 1 respondents are as follows:

<table>
<thead>
<tr>
<th>Marketing Area</th>
<th>Completes</th>
<th>Re-contact in October 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern U.S.</td>
<td>604</td>
<td>144</td>
</tr>
<tr>
<td>Western U.S.</td>
<td>604</td>
<td>311</td>
</tr>
<tr>
<td>Canada</td>
<td>608</td>
<td>317</td>
</tr>
<tr>
<td>Japan</td>
<td>603</td>
<td>274</td>
</tr>
</tbody>
</table>
### Purpose and Methodology

For some analyses respondents are segmented depending on how they responded to questions regarding destination characteristics considered when making travel decisions and whether or not these characteristics pertain to Hawai‘i. Following are the definitions for each segment. The definitions are meant to define travelers who prefer certain types of vacations.

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

Data will be presented in five major sections. The first section includes a Summary 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. 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.

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
RESULTS PRESENTATION

- 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
Executive Summary

- With an average age of 47, Canadian visitors are the oldest and at 44, Western U.S. visitors are the youngest. Eastern U.S. and Japanese visitors 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.

- Hawai’i is at the top of the consideration list for both Western U.S. and Japanese travelers. Hawai’i is number two behind Europe on the consideration list for Canada and number four among Eastern U.S. travelers behind Florida, the Caribbean, California, Las Vegas and the U.K.

- Among the 18 attributes (20 for the Japan market) important in choosing a leisure destination, Hawai’i meets or exceeds expectations among Eastern U.S. visitors as being romantic; among Western U.S. and Canadian visitors as a good place for family and children and as being romantic; and among Japanese visitors as a good place for family and children, a great place to get away from it all, as being romantic, a great place for shopping and ease of communicating in the travelers native language.

- 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.

- Between 40% and 50% of visitors from all markets, excluding the Eastern U.S., have visited Hawai’i in the past 36 months and of those between 50% and 65% have visited in the past 12 months. Only about 20% of Eastern U.S. visitors have visited in the past 36 months with about 30% visiting in the past 12. Eastern U.S. visitors are most likely to visit Hawai’i in the Summer, while those in the Western U.S. are most likely to visit in the fall. The Canadians are least likely to visit in the Summer and visitors from Japan travel fairly evenly throughout the seasons.

- A majority of visitors from the Western U.S., Canada and Japan plan to visit Hawai’i again in the next 24 months, with about 70% planning to do so in the next 12 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 it takes to get to Hawai’i. They feel they can get a better value at other destinations.
Executive Summary

• A majority of visitors from all four markets plan to visit O‘ahu on their next trip to Hawai‘i. Similar percentages of visitors from the Eastern U.S., Western U.S. and Canada also plan to visit the islands of Hawai‘i and Maui. Visitors from Japan overwhelmingly plan to visit O‘ahu and, while they plan to visit the other islands at a much lower rate than they do O‘ahu, they plan to visit all islands except Kua‘i and Moloka‘i at a greater rate than visitors from the other markets.

• Visitors from all markets primarily plan to stay in a hotel. Visitors from Canada, however are least likely to stay in a hotel and most likely to stay in a condo.

• 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. Canadians also feel that Hawai‘i is a great value and have noticed that there are more flights from cities closer to their home.

• At just about $4,800, Japanese visitors spend the most per trip which is likely due to the large percentage that is spent on shopping. Among all markets they have the largest share of spending for shopping. A large portion of their travel dollar also goes toward transportation. Canadians spend about $4,100, which is likely due to the their longer length of stay – about 12 days. Similar to the Canadians, those from the Eastern U.S. stay about 9 days and spend about $4,100. Western U.S. visitors spend the least on transportation and thus spend the least overall - about $3,500.

• 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., one-third or more 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**

- Eastern U.S.: 44.8
- Western U.S.: 43.7
- Canada: 46.6
- Japan: 44.6

**Summary - All Markets**
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) $140,000
• Western U.S. (U.S. Dollars) $147,000
• Canada (Canadian Dollars) $133,000
• Japan (Japanese Yen) ¥807

Travelers to Hawai’i tend to be more affluent as their Average Annual Household Incomes exceed the national averages in each of their countries.
### 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 (41%)</td>
<td>1. Hawai’i (54%)</td>
<td>1. Europe (38%)</td>
<td>1. Hawai’i (34%)</td>
</tr>
<tr>
<td>1. Caribbean (41%)</td>
<td>2. Other Europe (36%)</td>
<td>2. Hawai’i (36%)</td>
<td>2. Europe (33%)</td>
</tr>
<tr>
<td>2. California (37%)</td>
<td>3. Las Vegas (31%)</td>
<td>3. California (35%)</td>
<td>3. Australia (26%)</td>
</tr>
<tr>
<td>3. Las Vegas (27%)</td>
<td>4. Alaska (30%)</td>
<td>4. Las Vegas (31%)</td>
<td>4. Taiwan (23%)</td>
</tr>
<tr>
<td>4. U.K. (24%)</td>
<td>4. Australia (30%)</td>
<td>5. Mexico (30%)</td>
<td>5. Singapore (21%)</td>
</tr>
<tr>
<td>4. Hawai’i (24%)</td>
<td>4. Caribbean (30%)</td>
<td>5. Italy (28%)</td>
<td>6. Korea (19%)</td>
</tr>
<tr>
<td>4. Other Europe (24%)</td>
<td>5. France (28%)</td>
<td>5. France (28%)</td>
<td>6. Guam/Saipan (19%)</td>
</tr>
<tr>
<td>5. Italy (22%)</td>
<td>6. U.K. (26%)</td>
<td>6. Arizona (20%)</td>
<td>7. Hong Kong (14%)</td>
</tr>
<tr>
<td>5. Other (22%)</td>
<td>7. Mexico (25%)</td>
<td>7. Other (19%)</td>
<td>7. Thailand (14%)</td>
</tr>
<tr>
<td>6. Mexico (18%)</td>
<td>8. Germany (20%)</td>
<td>9. Australia (15%)</td>
<td>8. China (9%)</td>
</tr>
<tr>
<td>7. Costa Rica (16%)</td>
<td>9. Other (19%)</td>
<td>10. Florida (14%)</td>
<td>9. Other (8%)</td>
</tr>
<tr>
<td>8. France (15%)</td>
<td>10. Costa Rica (17%)</td>
<td>No Trip Considered (3%)</td>
<td>No Trip Considered (9%)</td>
</tr>
<tr>
<td>9. Switzerland (13%)</td>
<td>11. Switzerland (8%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Puerto Rico (13%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Germany (13%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Trip Considered (3%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Reasons for Taking a Leisure Vacation Anywhere (% Top 2 Box)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Japan</th>
<th>Canada</th>
<th>Western U.S.</th>
<th>Eastern U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can do fun recreational activities</td>
<td>58%</td>
<td>60%</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>No schedules to meet, I can do what I want, when I want</td>
<td>50%</td>
<td>71%</td>
<td>68%</td>
<td>78%</td>
</tr>
<tr>
<td>Have an outdoors adventure to test my physical abilities</td>
<td>23%</td>
<td>35%</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>I seek solitude and isolation when vacationing</td>
<td>24%</td>
<td>27%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>I can spend more quality time with my spouse/family</td>
<td>73%</td>
<td>73%</td>
<td>75%</td>
<td>83%</td>
</tr>
<tr>
<td>I can spend more time with my friends</td>
<td>45%</td>
<td>40%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>It's nice to have others serve/wait on me</td>
<td>40%</td>
<td>40%</td>
<td>34%</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Summary**

It's nice to have others serve/wait on me. I can spend more quality time with my spouse/family. Have an outdoors adventure to test my physical abilities. No schedules to meet, I can do what I want, when I want. I can do fun recreational activities.
Travel is an important part of my life
I feel alive and energetic when I travel
Vacations enrich my perspective on life
Renews my mind, body and soul
It’s a great chance to relax, get rid of stress
I gain knowledge of history or other cultures
I like to learn new things
I can see and do new things, have new/different experiences
I like to experience authentic local culture
Travel is an important part of my life
I feel alive and energetic when I travel
Vacations enrich my perspective on life
Renews my mind, body and soul
It’s a great chance to relax, get rid of stress
I gain knowledge of history or other cultures
I like to learn new things
I can see and do new things, have new/different experiences
I like to experience authentic local culture
**Attributes Important in Choosing a Destination (% Top 2 Box)**

- **It is a safe and secure place**
  - Japan: 76%
  - Canada: 79%
  - Western U.S.: 84%
  - Eastern U.S.: 83%

- **It's a good value for the money**
  - Japan: 78%
  - Canada: 77%
  - Western U.S.: 79%
  - Eastern U.S.: 79%

- **It offers a different experience than other places**
  - Japan: 76%
  - Canada: 72%
  - Western U.S.: 81%
  - Eastern U.S.: 81%

- **It has a variety of unique experiences and activities**
  - Japan: 68%
  - Canada: 74%
  - Western U.S.: 82%
  - Eastern U.S.: 80%

- **It is a great place to get away from it all**
  - Japan: 74%
  - Canada: 73%
  - Western U.S.: 78%
  - Eastern U.S.: 78%

- **It provides a sense of relaxation, a place to unwind and get re-energized**
  - Japan: 72%
  - Canada: 72%
  - Western U.S.: 74%
  - Eastern U.S.: 78%

- **It has unique scenery unlike anywhere else**
  - Japan: 66%
  - Canada: 70%
  - Western U.S.: 78%
  - Eastern U.S.: 80%

- **There are always opportunities to discover new activities and experiences that make you want to...**
  - Japan: 65%
  - Canada: 67%
  - Western U.S.: 74%
  - Eastern U.S.: 74%

- **The environment is clean**
  - Japan: 69%
  - Canada: 71%
  - Western U.S.: 74%
  - Eastern U.S.: 74%

- **Offers authentic experiences**
  - Japan: 66%
  - Canada: 72%
  - Western U.S.: 79%
  - Eastern U.S.: 79%

*Only asked of the Japanese Market*
**Attributes Important in Choosing a Destination (Cont.)** (% Top 2 Box)

- **The local people are friendly**
  - Japan: 70%
  - Canada: 64%
  - Western U.S.: 78%
  - Eastern U.S.: 78%

- **The history and culture are intriguing**
  - Japan: 73%
  - Canada: 68%
  - Western U.S.: 78%
  - Eastern U.S.: 78%

- **There are many historic and cultural things to see and do**
  - Japan: 69%
  - Canada: 69%
  - Western U.S.: 77%

- **It is easy to navigate and get around**
  - Japan: 59%
  - Canada: 60%
  - Western U.S.: 66%
  - Eastern U.S.: 68%

- **It offers quality culinary and dining experiences**
  - Japan: 56%
  - Canada: 64%
  - Western U.S.: 72%

- **It is easy to get there**
  - Japan: 58%
  - Canada: 61%
  - Western U.S.: 59%

- **It's a good place for family and children**
  - Japan: 43%
  - Canada: 44%
  - Western U.S.: 51%

- **It is romantic**
  - Japan: 37%
  - Canada: 42%
  - Western U.S.: 52%

- **It is easy to communicate in my native language**
  - Japan: 42%
  - Canada: 38%

- **It is a great place for shopping**
  - Japan: 51%

* Only asked of the Japanese Market
**Hawai’i Performance on Attributes Important in Choosing a Destination (% Top 2 Box)**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Japan</th>
<th>Canada</th>
<th>Western U.S.</th>
<th>Eastern U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>It provides a sense of relaxation, a place to unwind and get re-energized</td>
<td>66%</td>
<td>71%</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td>It is romantic</td>
<td>54%</td>
<td>64%</td>
<td>62%</td>
<td>66%</td>
</tr>
<tr>
<td>It has unique scenery unlike anywhere else</td>
<td>43%</td>
<td>62%</td>
<td>60%</td>
<td>62%</td>
</tr>
<tr>
<td>The environment is clean</td>
<td>58%</td>
<td>61%</td>
<td>62%</td>
<td>67%</td>
</tr>
<tr>
<td>It is a great place to get away from it all</td>
<td>55%</td>
<td>59%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>It has a variety of unique experiences and activities</td>
<td>42%</td>
<td>55%</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>It is a safe and secure place</td>
<td>50%</td>
<td>56%</td>
<td>59%</td>
<td>67%</td>
</tr>
<tr>
<td>It offers a different experience than other places</td>
<td>40%</td>
<td>45%</td>
<td>51%</td>
<td>50%</td>
</tr>
<tr>
<td>Offers authentic experiences</td>
<td>42%</td>
<td>46%</td>
<td>45%</td>
<td>56%</td>
</tr>
<tr>
<td>The local people are friendly</td>
<td>41%</td>
<td>57%</td>
<td>57%</td>
<td>60%</td>
</tr>
</tbody>
</table>

*Only asked of the Japanese Market*
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...
- The history and culture are intriguing
- There are many historic and cultural things to see and do
- It offers quality culinary and dining experiences
- It's a good place for family and children
- It is easy to navigate and get around
- It is easy to get there
- It's a good value for the money
- It is easy to communicate in my native language*
- It is a great place for shopping*

* Only asked of the Japanese Market
**Impression of Hawai’i (% Top 2 Box)**

- **Relaxation and romance**
  - Japan: 81%
  - Canada: 91%
  - Western U.S.: 90%
  - Eastern U.S.: 94%

- **Recreational activities, including water sports, zip lining, snorkeling, hiking, biking, etc.**
  - Japan: 85%
  - Canada: 94%
  - Western U.S.: 89%
  - Eastern U.S.: 95%

- **State/National parks and beaches**
  - Japan: 84%
  - Canada: 88%
  - Western U.S.: 85%
  - Eastern U.S.: 86%

- **Authentic native culture**
  - Japan: 60%
  - Canada: 80%
  - Western U.S.: 78%
  - Eastern U.S.: 80%

- **Family-friendly activities**
  - Japan: 81%
  - Canada: 89%
  - Western U.S.: 91%
  - Eastern U.S.: 75%

- **Golfing**
  - Japan: 72%
  - Canada: 80%
  - Western U.S.: 87%
  - Eastern U.S.: 72%

- **Local eateries and local specialty items**
  - Japan: 76%
  - Canada: 78%
  - Western U.S.: 84%
  - Eastern U.S.: 71%

- **Destination for cruise ships**
  - Japan: 68%
  - Canada: 80%
  - Western U.S.: 84%
  - Eastern U.S.: 70%
IMPRESSION OF HAWAI’I (CONT.) (% TOP 2 BOX)

- Historic/cultural sites, museums:
  - Japan: 50%
  - Canada: 70%
  - Western U.S.: 68%
  - Eastern U.S.: 75%

- Performing and cultural arts:
  - Japan: 45%
  - Canada: 70%
  - Western U.S.: 65%
  - Eastern U.S.: 75%

- Special events/festivals that occur throughout the year:
  - Japan: 68%
  - Canada: 62%
  - Western U.S.: 64%
  - Eastern U.S.: 74%

- Top restaurants/celebrity chefs/fine dining:
  - Japan: 65%
  - Canada: 63%
  - Western U.S.: 60%
  - Eastern U.S.: 72%

- Shopping:
  - Japan: 53%
  - Canada: 58%
  - Western U.S.: 54%
  - Eastern U.S.: 82%

- Place to see where movies and television shows were/are filmed:
  - Japan: 46%
  - Canada: 54%
  - Western U.S.: 64%
  - Eastern U.S.: 64%

- Celebrity sightings/places that celebrities visit:
  - Japan: 41%
  - Canada: 49%
  - Western U.S.: 56%
  - Eastern U.S.: 64%

- A variety of places to stay that fit any budget:
  - Japan: 35%
  - Canada: 56%
  - Western U.S.: 64%
  - Eastern U.S.: 64%

A variety of places to stay that fit any budget
Celebrity sightings/places that celebrities visit
Place to see where movies and television shows were/are filmed
Special events/festivals that occur throughout the year
Top restaurants/celebrity chefs/fine dining
Shopping
Performing and cultural arts
Historic/cultural sites, museums
Japan
Canada
Western U.S.
Eastern U.S.
**HAWAI‘I VISITATION FREQUENCY**

- **Eastern U.S.**
- **Western U.S.**
- **Canada**
- **Japan**

### Visited Past 36 Months
- Eastern U.S.: 19%
- Western U.S.: 48%
- Canada: 45%
- Japan: 41%

### Visited Past 12 Months
- Eastern U.S.: 30%
- Western U.S.: 63%
- Canada: 52%
- Japan: 41%

### Plan to Visit Next 24 Months
- Eastern U.S.: 24%
- Western U.S.: 55%
- Canada: 50%
- Japan: 46%

### Plan to Visit Next 12 Months
- Eastern U.S.: 50%
- Western U.S.: 73%
- Canada: 66%
- Japan: 72%
PLANNED VISITATION TO ISLANDS OF HAWAI’I (AMONG THOSE PLANNING TO VISIT IN NEXT 24 MONTHS)
PLANNED ACCOMMODATIONS (AMONG THOSE PLANNING TO VISIT HAWAI’I IN NEXT 24 MONTHS)

- **Hotel**:
  - Eastern U.S.: 61%
  - Western U.S.: 70%
  - Canada: 51%
  - Japan: 87%

- **Condo**:
  - Eastern U.S.: 42%
  - Western U.S.: 19%
  - Canada: 81%

- **Bed & Breakfast**:
  - Eastern U.S.: 22%
  - Western U.S.: 16%

- **Family/friend home**:
  - Eastern U.S.: 14%
  - Western U.S.: 13%
  - Canada: 11%

- **Timeshare**:
  - Eastern U.S.: 10%
  - Western U.S.: 8%
  - Canada: 7%

- **Cruise ship**:
  - Eastern U.S.: 7%
  - Western U.S.: 6%
  - Canada: 6%

- **Rental house**:
  - Eastern U.S.: 7%
  - Western U.S.: 5%
  - Canada: 3%

- **Other**:
  - Eastern U.S.: 3%
  - Western U.S.: 0%
  - Canada: 0%
## Reasons for Not Visiting Hawai‘i (Among Those Considering, But Not Planning to Visit)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Japan</th>
<th>Canada</th>
<th>Western U.S.</th>
<th>Eastern U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price of the airfare</td>
<td>11%</td>
<td>26%</td>
<td>70%</td>
<td>81%</td>
</tr>
<tr>
<td>Price of the hotel</td>
<td>14%</td>
<td>19%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Price of the vacation package</td>
<td>11%</td>
<td>16%</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Better value at another destination</td>
<td>15%</td>
<td>11%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>Flight to Hawai‘i is too long</td>
<td>7%</td>
<td>17%</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>Been to Hawai‘i before, I wished to try another destination</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
<td>33%</td>
</tr>
<tr>
<td>I don’t have enough time to travel to Hawai‘i</td>
<td>7%</td>
<td>18%</td>
<td>17%</td>
<td>65%</td>
</tr>
<tr>
<td>Shopping in Hawai‘i is not a good value</td>
<td>2%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Health/other personal reasons</td>
<td>0%</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Hawai‘i is too congested</td>
<td>0%</td>
<td>13%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**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)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Japan</th>
<th>Canada</th>
<th>Western U.S.</th>
<th>Eastern U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job/Employment instability</td>
<td>0%</td>
<td>3%</td>
<td>13%</td>
<td>58%</td>
</tr>
<tr>
<td>Not enough activities in Hawai‘i that interest me</td>
<td>5%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Cancelled planned trip and will go to an alternative destination instead</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Cancelled trip and will stay at home</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Accommodations were not available</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Too difficult to visit islands other than O‘ahu*</td>
<td></td>
<td></td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>The exchange rate is unfavorable*</td>
<td></td>
<td></td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Hawai‘i is not a popular destination*</td>
<td></td>
<td></td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Family/frineds/co-workers said not to go*</td>
<td>0%</td>
<td></td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>21%</td>
</tr>
</tbody>
</table>

* 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)**

- **Eastern U.S.**: 2.42
- **Western U.S.**: 4.99
- **Canada**: 4.53
- **Japan**: 3.82
**Reasons for Returning to Hawai’i** (Among those visiting Hawai’i 2+ times)

- **It has stunning natural beauty**
  - Japan: 63%
  - Canada: 74%
  - Western U.S.: 70%
  - Eastern U.S.: 76%

- **Always great weather**
  - Japan: 61%
  - Canada: 70%
  - Western U.S.: 74%
  - Eastern U.S.: 74%

- **Beaches are great**
  - Japan: 57%
  - Canada: 67%
  - Western U.S.: 71%
  - Eastern U.S.: 74%

- **I love to experience the culture**
  - Japan: 17%
  - Canada: 35%
  - Western U.S.: 45%
  - Eastern U.S.: 45%

- **It is safe**
  - Japan: 44%
  - Canada: 45%
  - Western U.S.: 55%
  - Eastern U.S.: 67%

- **Food and dining options**
  - Japan: 26%
  - Canada: 38%
  - Western U.S.: 38%
  - Eastern U.S.: 38%

- **It’s familiar and I know my way around**
  - Japan: 26%
  - Canada: 40%
  - Western U.S.: 49%
  - Eastern U.S.: 49%

- **I have friends or family there**
  - Japan: 10%
  - Canada: 15%
  - Western U.S.: 16%
  - Eastern U.S.: 13%
**Summary – All Markets**

**Year Last Visited Hawai‘i**

- **Eastern U.S.**
- **Western U.S.**
- **Canada**
- **Japan**

<table>
<thead>
<tr>
<th></th>
<th>2014 (as of NOV)</th>
<th>2013</th>
<th>Prior to 2013</th>
<th>Don't Remember</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>11%</td>
<td>12%</td>
<td>75%</td>
<td>2%</td>
</tr>
<tr>
<td>2013</td>
<td>20%</td>
<td>22%</td>
<td>57%</td>
<td>1%</td>
</tr>
<tr>
<td>Prior to</td>
<td>25%</td>
<td>22%</td>
<td>52%</td>
<td>0%</td>
</tr>
<tr>
<td>2013</td>
<td>30%</td>
<td>20%</td>
<td>46%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Year Last Visited Hawai‘i**
**Season Last Visited Hawai‘i**

<table>
<thead>
<tr>
<th>Season</th>
<th>Eastern U.S.</th>
<th>Western U.S.</th>
<th>Canada</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter</td>
<td>18%</td>
<td>29%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Spring</td>
<td>27%</td>
<td>28%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Summer</td>
<td>31%</td>
<td>23%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Fall</td>
<td>32%</td>
<td>24%</td>
<td>21%</td>
<td>19%</td>
</tr>
</tbody>
</table>
LIKELIHOOD OF RETURNING TO HAWAI’I IN NEXT 24 MONTHS (%; MEAN)

<table>
<thead>
<tr>
<th>Region</th>
<th>Not At All Likely (1)</th>
<th>Not Too Likely (2)</th>
<th>Somewhat Likely (3)</th>
<th>Very Likely (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern U.S.</td>
<td>23%</td>
<td>38%</td>
<td>27%</td>
<td>11%</td>
</tr>
<tr>
<td>Western U.S.</td>
<td>9%</td>
<td>21%</td>
<td>40%</td>
<td>33%</td>
</tr>
<tr>
<td>Canada</td>
<td>11%</td>
<td>27%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Japan</td>
<td>8%</td>
<td>18%</td>
<td>36%</td>
<td>38%</td>
</tr>
</tbody>
</table>