

2014

Visitor Satisfaction
and Activity Report

HAWAII TOURISM

AUTHORITY

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ABOUT THIS REPORT

The 2014 Visitor Satisfaction and Activity Report (VSAT) presents the results of a survey conducted annually by the Hawai'i Tourism Authority (HTA) as part of its Tourism Research program. There were four objectives for the survey and the report.

The first objective was to provide measurements of survey respondents' satisfaction with Hawai'i as a visitor destination. Visitors from U.S. West, U.S. East, Japan, Canada, Europe, and Oceania were surveyed. The report described visitors' evaluation of their vacation experience by investigating their reaction to events that occurred on the island on which they stayed the longest. Visitors rated their stay on four different evaluation categories – overall satisfaction, how well their experience matched their expectations, likelihood of recommending Hawai'i to others, and likelihood of returning to Hawai'i within the next five years.

The second objective was to investigate the activities in which visitors took part as they visited each of the islands on their itinerary. VSAT measured 50 activities which were categorized as sightseeing, shopping, history, culture and arts, entertainment and dining, recreation and transportation. Business activities, sports, wedding and family celebrations and visiting with friends and relatives were also measured. Those activities defined the vacation trips enjoyed by Hawai'i's visitors and provide a measure of the extent to which our products are being used.

The third objective was to offer some insights into the destination selection and trip planning process, as well as the timetable involved in planning and booking a trip. Survey data showed that visitors employed a variety of resources to plan, select and book a trip to Hawai'i.

The final objective was to provide demographic profiles of Hawai'i visitors. VSAT pulled together demographic and travel behavior patterns from this survey, the Domestic Inflight Survey and the International Intercept Survey¹. Together, these sources provide data on income and education, employment status, life-stage segments, First-Time or Repeat visitors, the structure and type of the visitor party and reasons for visiting Hawai'i. This represents an enhanced level of detail not available from HTA's annual and monthly visitor reports.

COMPARING ANNUAL DATA

VSAT 2014 surveys were mailed to visitors from U.S. West, U.S. East, Canada, Japan, Europe, and Oceania. VSAT data has been collected from U.S., Canadian and Japanese visitors since 2002. Visitors from Europe were surveyed in the years 2007, 2008, 2009, 2012, 2011, 2013, and 2014. Visitors from Oceania were surveyed in 2008, 2009, 2011, 2012, 2013 and 2014.

We note that the rating scale for Question 1 of the VSAT survey, "Overall, how would you rate your most recent trip to Hawai'i?" was changed in 2012, from a 4-point scale to an 8-point scale (7-8

¹ Hawai'i Tourism Authority, Annual Research Report, 2014, pp. 154-157.

Excellent, 5-6 Above Average, 3-4 Below Average, 1-2 Poor). Therefore, current results for this question are not comparable to survey years 2011 and prior.

DEFINITIONS

Visitor: An out-of-state traveler who stayed in Hawai'i for at least one night and less than one year. In this report, findings attributed to “visitors” are based on data collected from six Major Market Areas – U.S. West, U.S. East, Canada, Japan, Europe, and Oceania.

Major Market Area (MMA): Geographic areas used to classify visitors according to their place of origin for the purpose of destination marketing management. VSAT 2014 reports data for the following MMAs:

1. U.S. West – Pacific states (Alaska, California, Oregon, Washington) and Mountain states (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming)
2. U.S. East – Other states in the continental U.S.
3. Japan
4. Canada
5. Europe – United Kingdom, Germany, France, Italy, and Switzerland
6. Oceania – Australia and New Zealand

Visitor Lifestyle and Lifestage: A classification used by HTA and other visitor industry members in Hawai'i to study specific market segments using the following classification:

- ❖ **Wedding/Honeymoon:** Visitors whose primary or secondary purpose of trip is to get married or be on their honeymoon
- ❖ **Family:** Visitors traveling with children under 18 years of age and are not included in the above lifestage
- ❖ **Young:** Visitors between 18 and 34 years of age and who are not in the above lifestages
- ❖ **Middle Age:** Visitors between 35 and 54 years of age and not in the above lifestages
- ❖ **Seniors:** Visitors 55 years of age or over and not in the above lifestages

Length of Stay: The average number of days visitors were present in Hawai'i including the day of arrival and the day of departure.

AVAILABILITY OF THIS REPORT

This report and the companion Excel workbook of 2014 VSAT data tables are available on the HTA website: www.HawaiiTourismAuthority.org/research/reports/visitor-satisfaction.

For further information contact the HTA at (808) 973-2255.

This report was produced by HTA's Tourism Research staff: Mr. Daniel Nahoopii, Director, Ms. Minh-Chau T. Chun, Mr. Lawrence Liu, and Ms. Jennifer Chun. The President and CEO of HTA is Mr. George Szigeti.

OVERVIEW OF VISITOR INDUSTRY

2014 was another strong year for Hawai'i's visitor industry. Total expenditures by all visitors who came to Hawai'i in 2014 gained 2.8 percent compared to the prior year to \$14.94 billion. When adjusted for inflation, total visitor expenditures were up 1.3 percent from 2013. A total of 8,308,114 visitors arrived by air or by cruise ships in 2014, which was an increase of 1.6 percent from the 2013 record of 8,174,461 visitors.

Arrivals by air to O'ahu increased 2.6 percent to 5,176,858 visitors in 2014. There were 2,410,214 visitors who came by air to Maui in 2014, up 2.2 percent from the previous year. Air arrivals to Moloka'i increased 8.1 percent to 59,647, but there was an 8.6 percent drop in arrivals to Lāna'i (to 67,948 visitors). There were 1,117,703 air visitors (+0.3%) to Kaua'i in 2014, similar to last year. Arrivals by air to Hawai'i Island rose one percent to 1,449,070 visitors in 2014.

For a complete analysis of Hawai'i's visitor industry, please refer to the 2014 Annual Visitor Research Report posted in July 2015 at:

www.hawaiitourismauthority.org/research/reports/annual-visitor-research

and click on 2014 Annual Research Report (pdf).

Note: Page 33 of the 2014 Annual Visitor Research report included selected preliminary VSAT statistics for overall rating of most recent vacation to Hawai'i, meeting visitor expectations, likelihood to recommend Hawai'i, and likelihood to revisit Hawai'i. The data presented in this 2014 Visitor Satisfaction and Activities report supercede the 2014 Annual Visitor Research report.

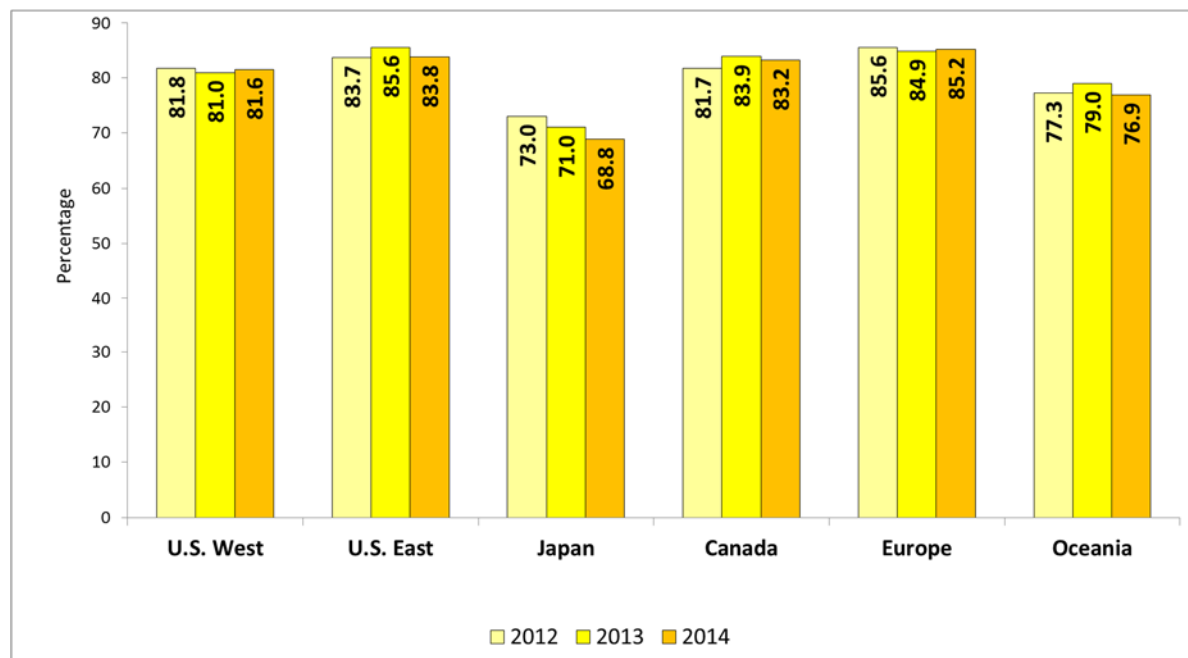
VISITOR SATISFACTION

Visitor satisfaction levels are an important indicator of visitor industry performance. They provide important feedback on how well services are delivered and how well those services fulfill visitors' expectations. High satisfaction encourages return trips to Hawai'i and results in a higher likelihood to recommend Hawai'i as a vacation destination (See the companion Excel workbook of 2014 annual VSAT data tables posted on the HTA website).

OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I².

The majority of visitors in 2014 continued to give high marks for their overall experience in Hawai'i, although "excellent" ratings for several visitor markets were lower compared to 2013. (Figure 1).

Figure 1: Overall Rating of Trip
(Percentage of visitors who rated most recent trip "Excellent" by MMA)



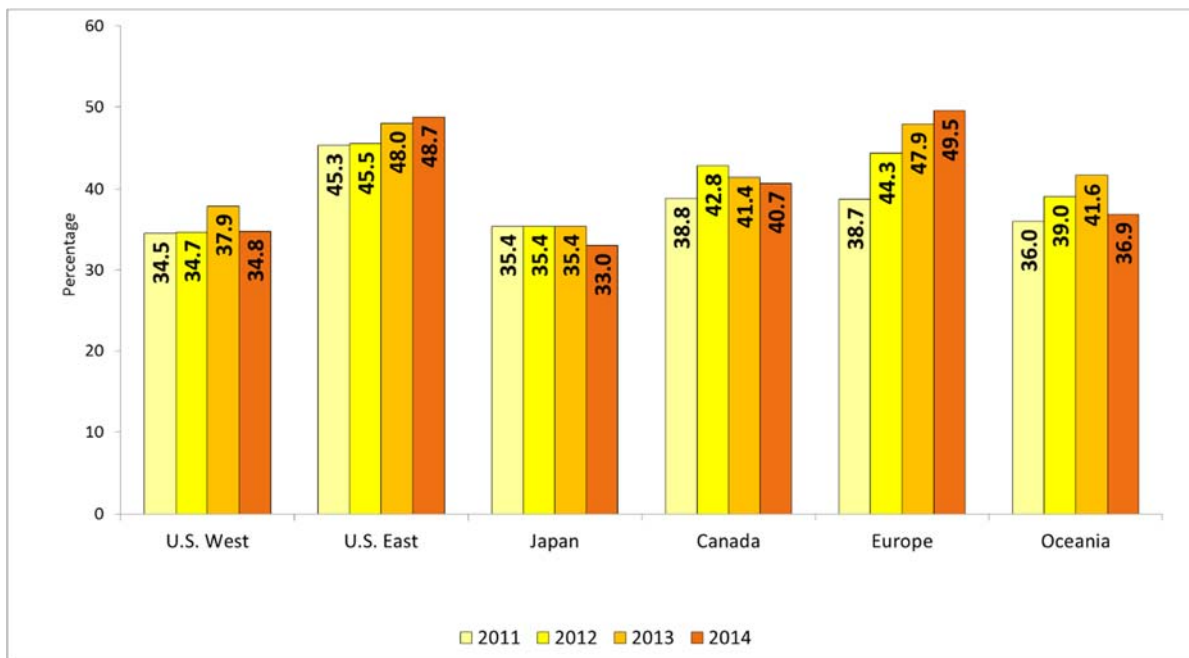
- Excellent ratings by U.S. East (83.8%) and Oceania (76.9%) visitors were down 1.8 points and 2.1 points, respectively.
- Ratings from Japanese visitors declined to 68.8 percent in 2014 and was the lowest in three years.
- Ratings from U.S. West (+0.6 points to 81.6%), Canadian (-0.7 points to 83.2%) and European (+0.3 points to 85.2%) visitors were relatively unchanged compared to 2013.

² Percentages shown in Figure 1 are the sum of ratings of 7 and 8, divided by the total responses. A scale change was made in 2012 (see page 1, Comparing Annual Data). Therefore results for 2011 or earlier were not comparable and were excluded from Figure 1.

MEETING VISITOR EXPECTATIONS

Visitors' evaluation of their trip is influenced not only by the nature of the service they receive, but also by their needs, motivations, and interests. Therefore, it is important to measure how well the destination meets expectations. Although ratings for some visitor markets were down compared to 2013, Hawai'i's ability to "exceed expectations" remained quite strong. Few visitors (less than 5%) felt that Hawai'i "did not meet their expectations" at all.

Figure 2: Trip Exceeded Expectations
(Percentage of visitors who said this trip "Exceeded Expectations" by MMA)

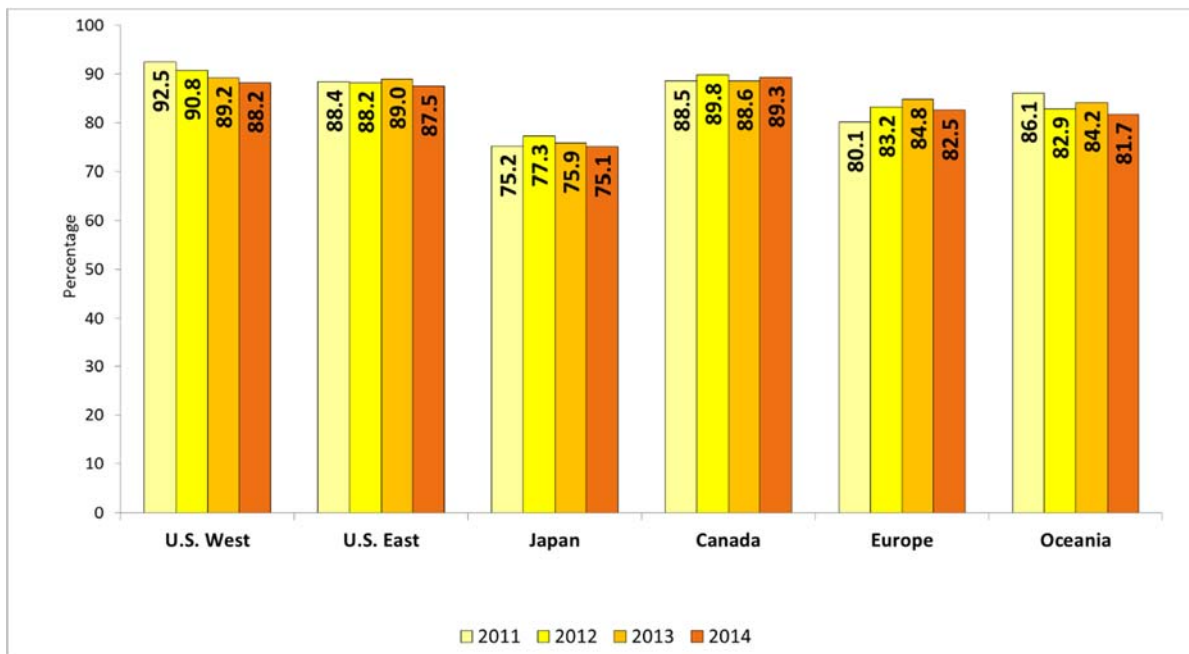


- A lower percentage of visitors from Oceania (-4.7 points to 36.9%), U.S. West (-3.1 points, to 34.8%) and Japan (-2.4 points to 33%) felt their trip exceeded their expectations compared to 2013.
- Ratings by Europe visitors increased 1.6 points to 49.5 percent.

LIKELIHOOD TO RECOMMEND HAWAI‘I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. Word-of-mouth is a critical aspect of Hawai‘i’s marketing efforts because these referrals create more First-Time visitors to Hawai‘i and encourage previous visitors to return. The majority of visitors surveyed in 2014 continued to respond that they would “very likely” recommend Hawai‘i to others (Figure 3). Less than 3 percent of visitors from each markets were “not too likely” or “not at all likely” to recommend Hawai‘i.

**Figure 3: Very Likely to Recommend Hawai‘i to Friends and Relatives
(Percentage of visitors “Very Likely” to recommend Hawai‘i for vacation by MMA)**

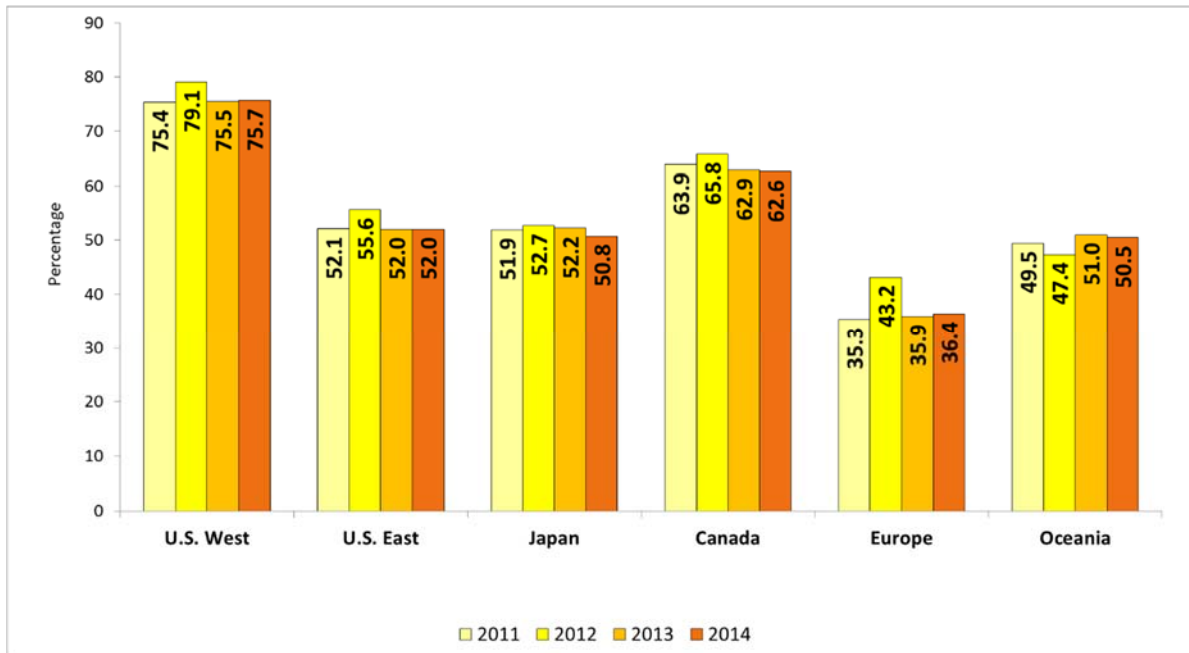


- Ratings by visitors from Europe (-2.3 points, to 82.5%), Oceania (-2.5 points to 81.7%) and U.S. East (-1.5 points to 87.5%) declined from 2013.
- Though U.S. West visitors’ ratings only dropped by 1 point in 2014, there has been a steady decline since 2011.

LIKELIHOOD TO REVISIT HAWAI‘I

Likelihood to revisit Hawai‘i is an indicator of future demand and changes in desires. Each visitor’s decision to return to Hawai‘i is influenced by a variety of factors. Among these factors are positive experiences during their most recent trips, a desire for new experiences, amount of time available, financial considerations, airline access and the distance from Hawai‘i.

Figure 4: Very Likely to Revisit Hawai‘i
(Percentage of visitors “Very Likely” to revisit in the next five years by MMA)

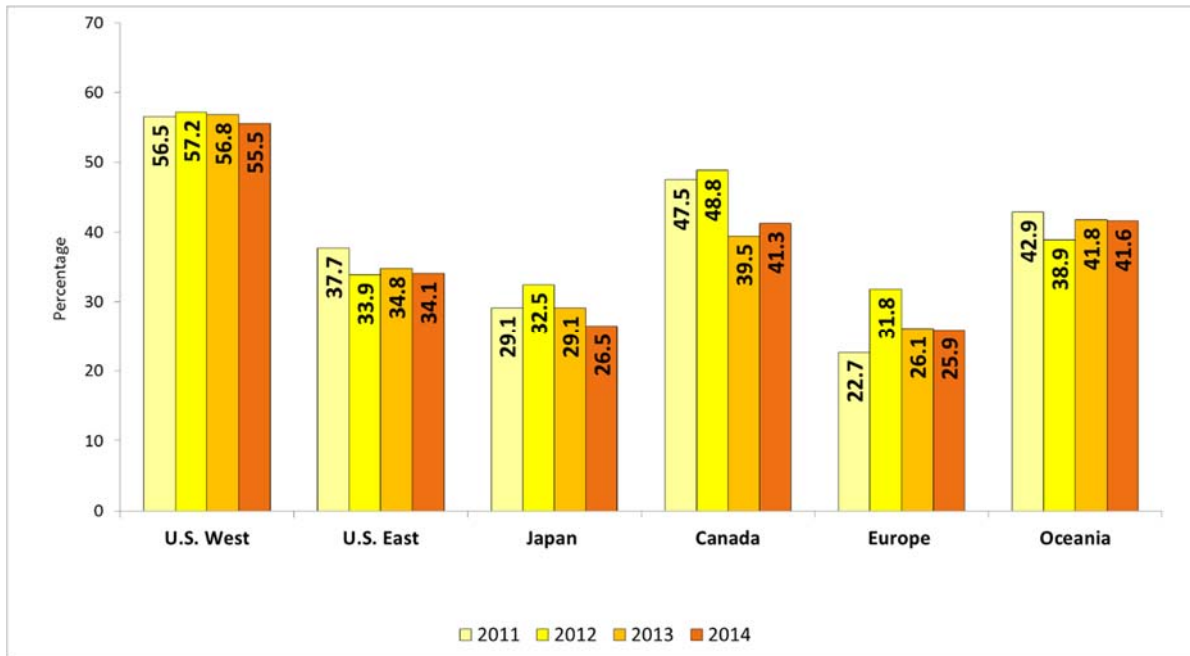


- Nearly 76 percent of U.S. West visitors in 2014 responded that they would “very likely” revisit Hawai‘i in the next five years (Figure 4).
- Ratings among Canadian (62.6%), U.S. East (52%) and Oceania (50.5%) visitors were comparable to 2013.
- With the long distance and no direct flights to Hawai‘i, European visitors have typically been less likely to return to the islands than visitors from other markets. In 2014, their rating of 36.4 percent was about the same as last year.
- Ratings from Japanese visitors, which were relatively stable in previous years, dropped 1.4 points in 2014, largely due to fewer First-Time visitors wanting to come back.

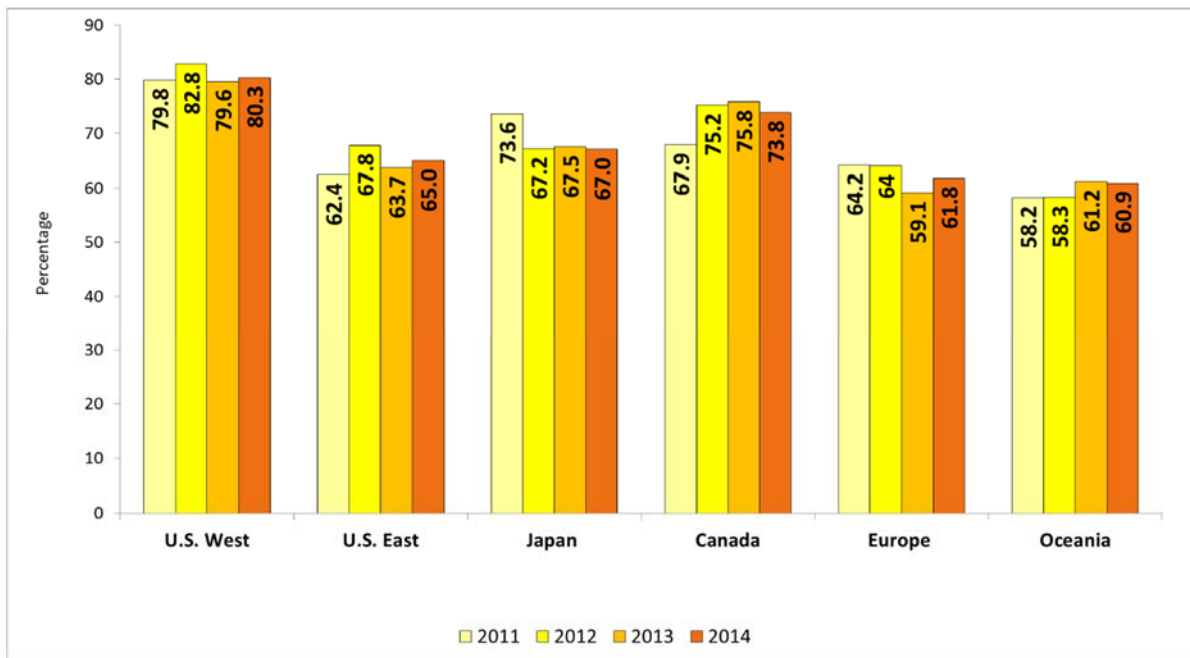
FIRST-TIME /REPEAT VISITORS

Likelihood to revisit is also highly correlated with visitor status (First-Time or Repeat). Percentages of First-Time and Repeat visitors varied across visitor markets. Figure 5 presents VSAT measures for likelihood of returning to Hawai‘i by First-Time visitors and Figure 6 presents the same measures by Repeat visitors.

**Figure 5: First-Time Very Likely to Revisit Hawai'i
(Percentage of First-Time visitors "Very Likely" to revisit in the next five years by MMA)**



**Figure 6: Repeat Visitors Very Likely to Revisit Hawai'i
(Percentage of Repeat visitors "Very Likely" to revisit in the next five years by MMA)**



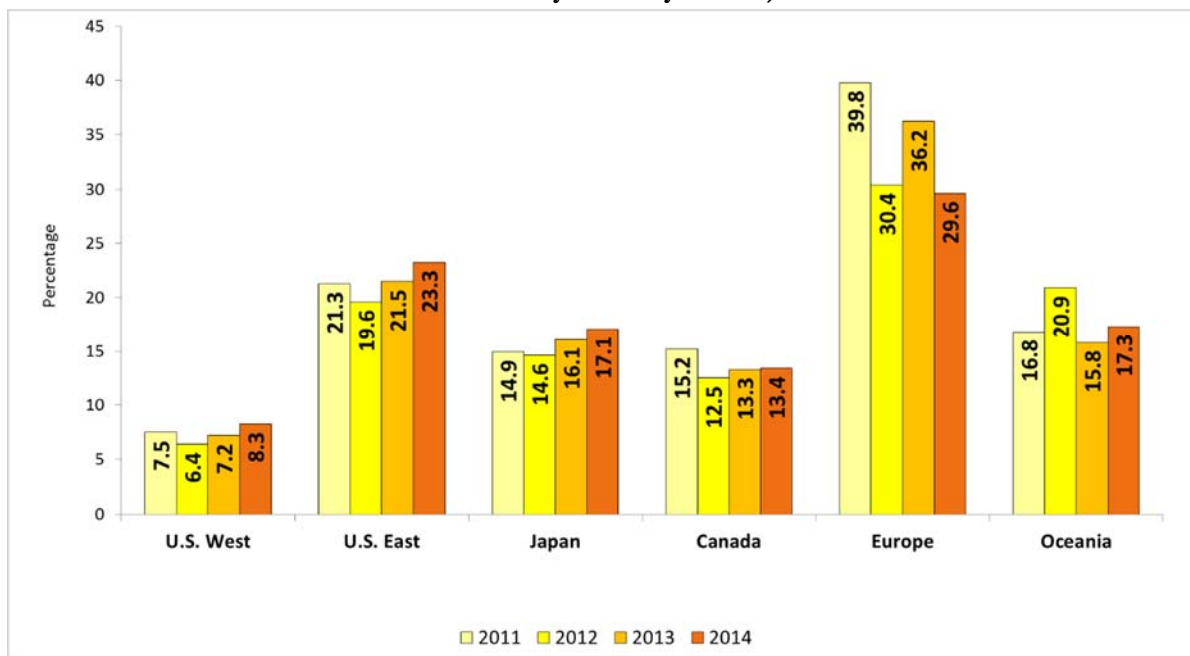
- Among First-Time visitors to Hawai'i in 2014, over 50 percent of U.S. West respondents said that they would very likely return to the islands. The group with the lowest percentage of returning were First-Time visitors from Europe (25.9%), followed closely by First-Time visitor from Japan (26.5%) (Figure 5).

- The majority of Repeat visitors from the six visitor markets answered that they will “very likely” revisit Hawai‘i in the next five years (Figure 6).
- Among U.S. West respondents, a lower percentage of First-Time visitors (-1.3 points to 55.5%) said that they would “very likely” return, while 80.3 percent if Repeat visitors said that they would come back.
- For U.S. East respondents, 34.1 percent of First-Time visitors said they would return, similar to 2013. A higher percentage of U.S. East Repeat Visitors (+1.3 points to 65%) said that they would very likely return compared to 2013.
- Among Japanese respondents, fewer First-Time visitors (-2.6 points to 26.5%) said that they would return, while ratings from Repeat visitors (67%) was similar to last year.
- For Canadian respondents, more First-Time visitors (+1.8 points to 41.3%) said that they will very likely revisit the islands. However, ratings from Canadian Repeat visitors fell 2 points to 73.8 percent in 2014.
- Among European respondents, ratings by First-Time visitors (25.9%) were similar to 2013, while a higher percentage of Repeat visitors (+2.7 points to 61.8%) said that they would likely return.
- For Respondents from Oceania, the likelihood of returning by First-Time visitors (41.6%) and Repeat visitors (60.9%) were virtually unchanged from last year.

Not Likely to Revisit Hawai‘i

The percentage of U.S. West visitors who said that they would “not too likely” or “not at all likely” return to Hawai‘i continues to be fairly low. Percentages were higher for Canadian, Japanese and U.S. East visitors and were the highest for European visitors (Figure 7).

Figure 7: Not Likely to Revisit Hawai‘i
(Percentage of visitors who are “Not too likely” or “Not at all likely” to visit Hawai‘i in the next five years” by MMA)



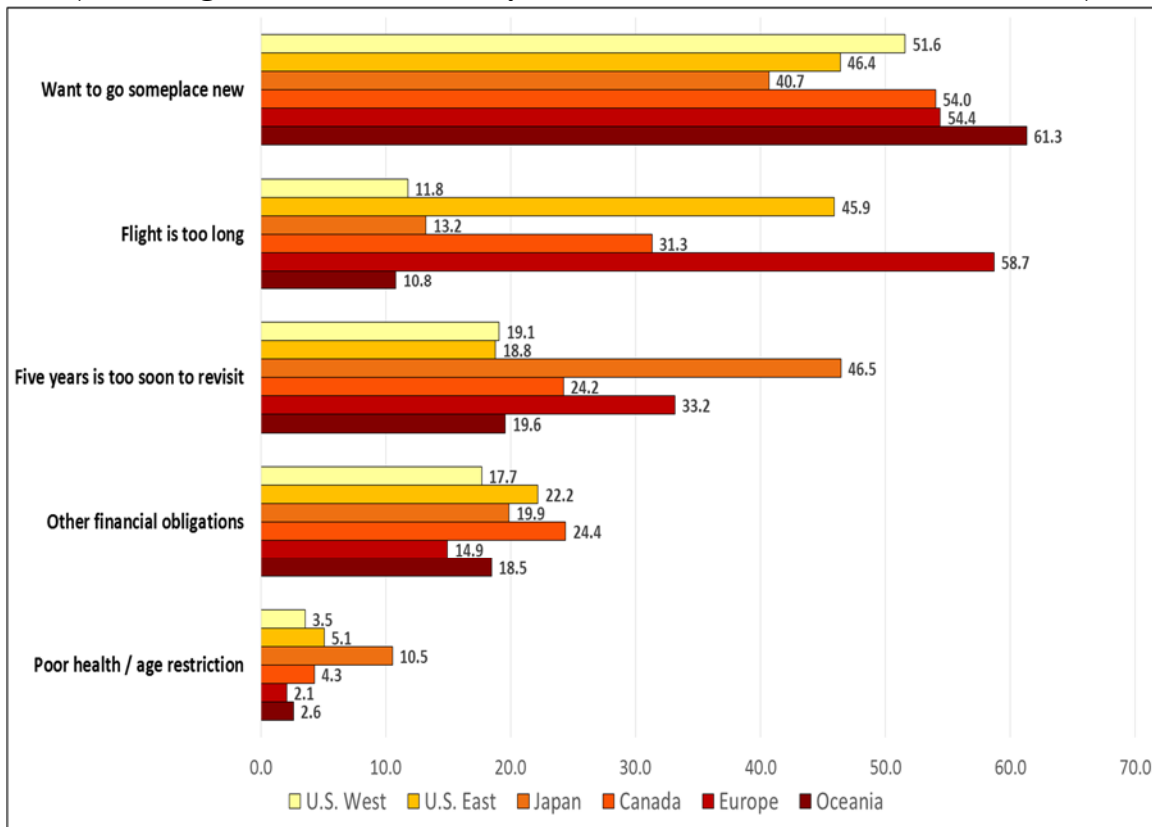
- Fewer European visitors in 2014 (29.6%) said that they would not likely return compared to last year (36.2%).
- The percentage of U.S. West (+1.1 points to 8.3%), Japanese (+1 point to 17.1%), Oceania (+1.5 points to 17.3%) and U.S. East (+1.8 points to 23.3%) visitors not likely to return were slightly higher than 2013, while ratings for Canadian visitors were relatively unchanged.

Reasons for Not Revisiting Hawai‘i

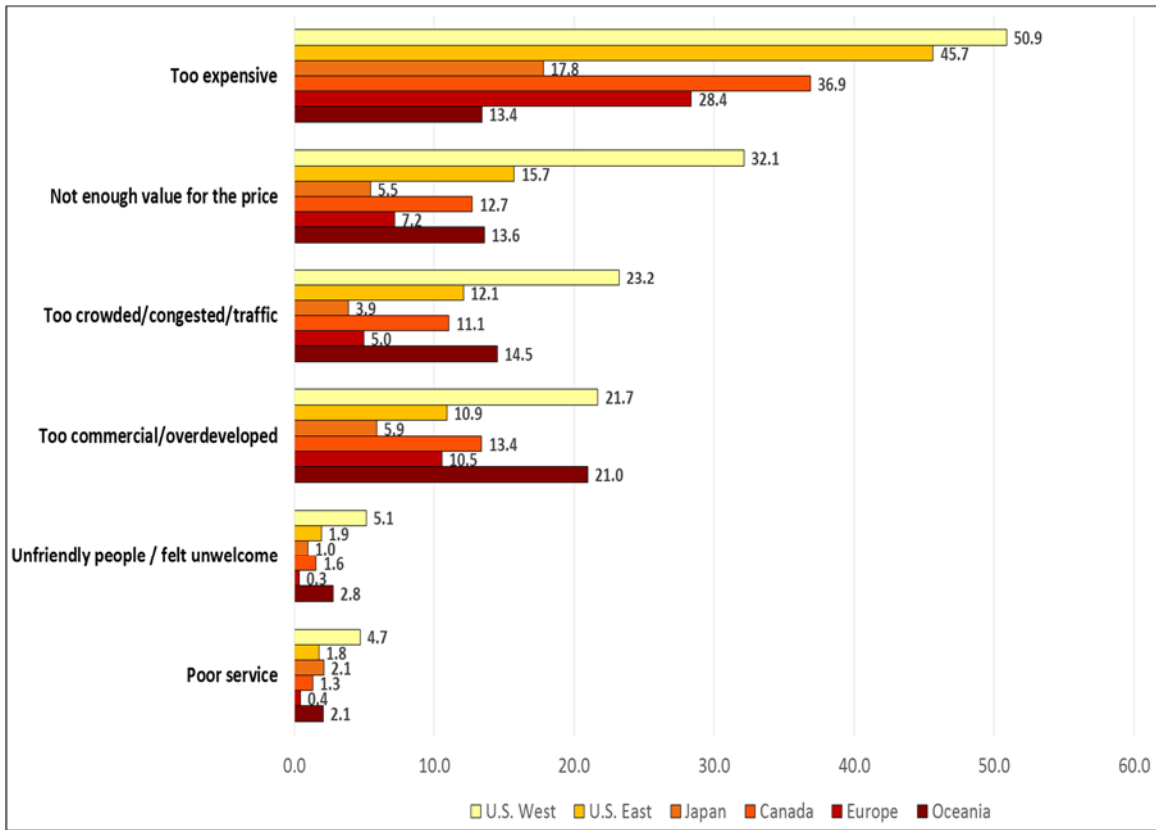
Respondents who said that they would “not too likely” or “not at all likely” return were asked to give the reason(s). A list of 11 reasons were offered in the survey and respondents could check all that applied.

The five items in Figure 8 are “barriers” to returning. They are conditions of the marketplace or characteristics of the traveler. The six items in Figure 9 are “performance” issues. They are comments that indicate dissatisfaction with Hawai‘i’s visitor industry product. “Not enough value for the price” is similar to “too expensive,” but is a complaint about the quality of the product rather than its price tag. For all visitor markets, very few respondents said they would not return because of unfriendly people or poor service.

Figure 8: Reasons for Not Returning by MMA – “Barriers”
(Percentage of Visitors not Likely to Revisit Hawai‘i in the Next Five Years)



**Figure 9: Reasons for Not Returning by MMA – “Performance Issues”
(Percentage of Visitors not Likely to Revisit Hawai‘i in the Next Five Years)**



U.S. West: Of those U.S. West visitors who would not likely return, 51.6 percent said they want to visit someplace new, while 50.9 percent said that Hawai‘i is too expensive. Not enough value for the price, (32.1%), too crowded/congested (23.2%), too commercial/overdeveloped (21.7%), and five years is too soon to revisit (19.1%) were other reasons provided.

U.S. East: The desire to visit someplace new (46.4%), the flight is too long (45.9%) and Hawai‘i is too expensive (45.7%) were the most common reasons given by U.S. East visitors for not returning. Other financial obligations (22.2%) and five years is too soon to revisit (18.8%) were also mentioned.

Japan: In 2014, 46.5 percent of Japanese respondents felt that five years is too soon to revisit while 40.7 percent said they want to go somewhere new. Some listed other financial obligations (19.9%), and felt that Hawai‘i is too expensive (17.8%).

Canada: Among Canadian respondents who will not likely return, 54 percent said they want to go someplace new. Other reasons provided were Hawai‘i is too expensive (36.9%), the flight is too long (31.3%), five years is too soon to revisit (24.2%), and other financial obligations (24.4%).

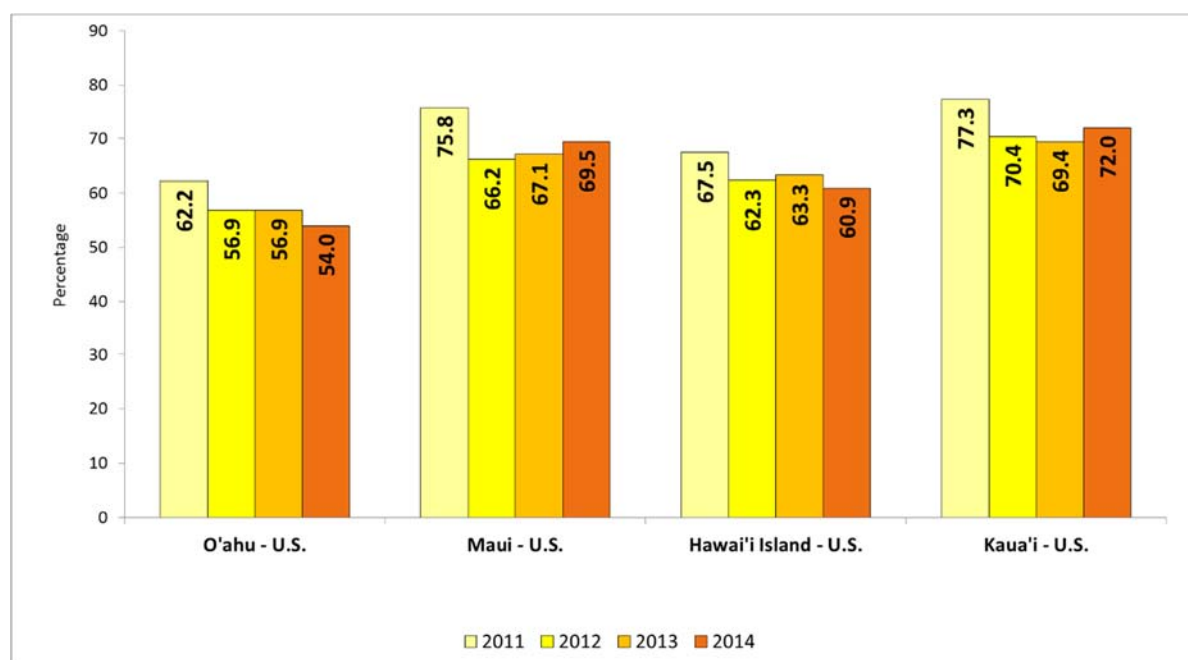
Europe: In 2014, 58.7 percent of European respondents said they will not return because the flight is too long while 54.4 percent want to visit someplace new. Other reasons for not returning were five years is too soon to revisit (33.2%) and Hawai‘i is too expensive (28.4%).

Oceania: The desire to visit someplace new was the top reason from Oceania respondents who do not plan to return to Hawai'i (61.3%). Some felt that Hawai'i is too commercial/overdeveloped (21%), five years is too soon to revisit (19.6%), or have other financial obligations (18.5%).

INDIVIDUAL ISLAND EXPERIENCE

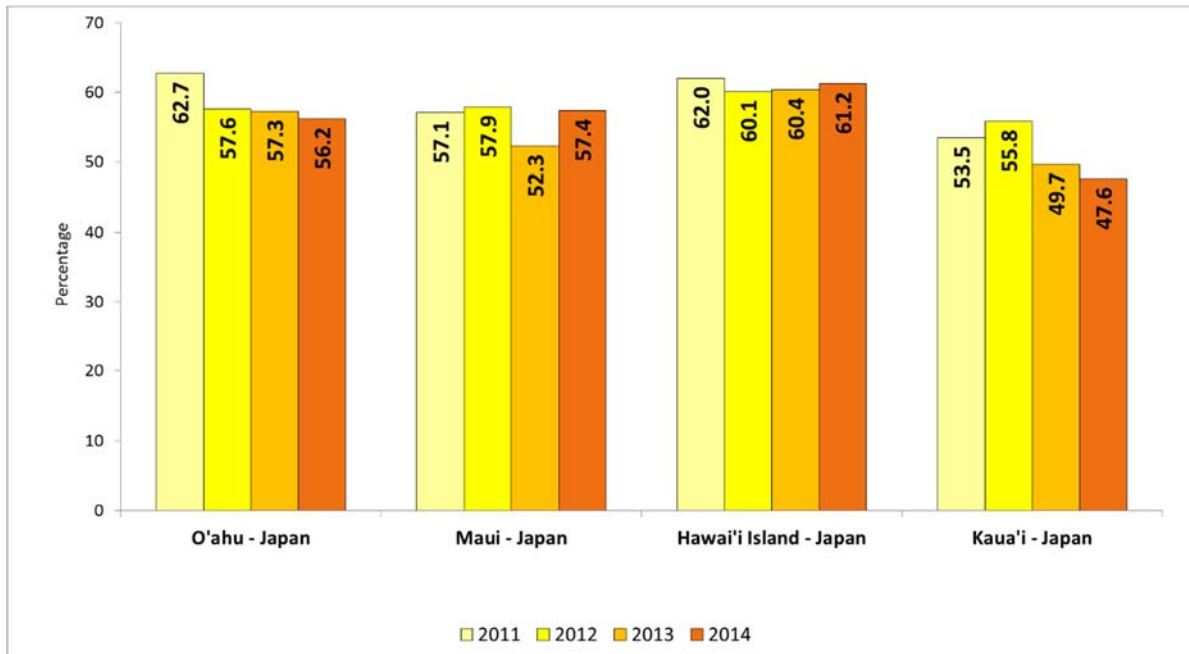
Each island has unique characteristics, activities, and products that provide different visitor experiences. Overall, the majority of visitors reported that their individual island experiences were “excellent.” Figure 10 shows island-by-island satisfaction rating among U.S. visitors.

**Figure 10: Island Experience Rated as “Excellent” – U.S. Visitors
(Percentage of visitors by island)**



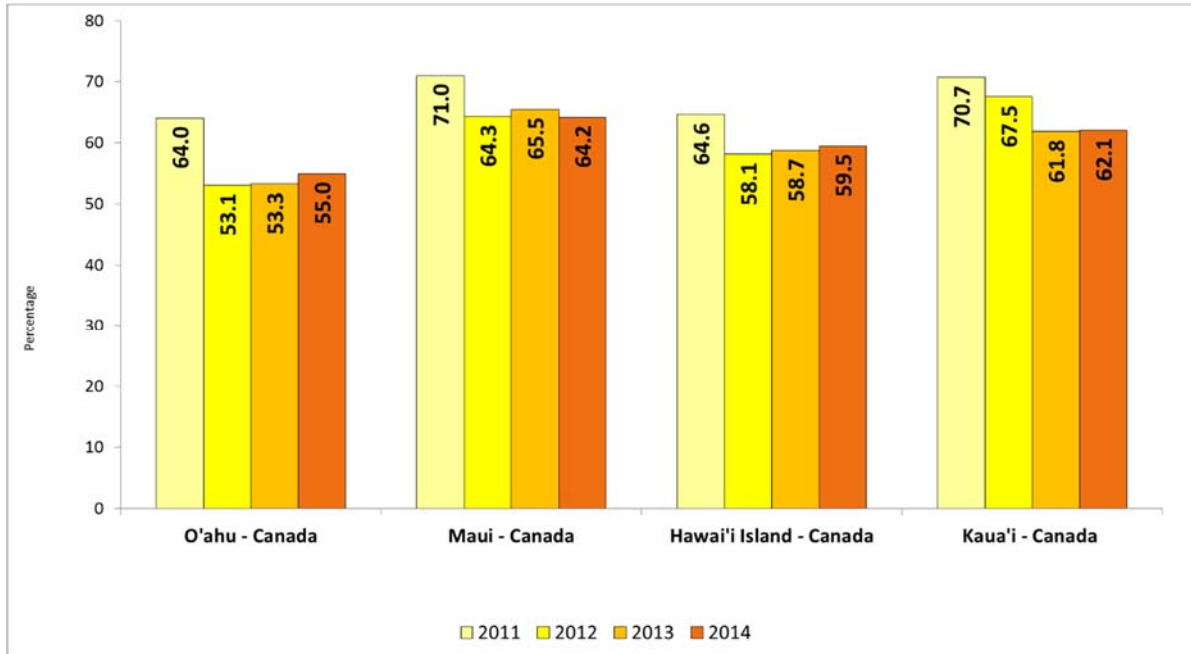
- Typically, U.S. visitors’ “excellent” ratings for O’ahu have been slightly lower compared to the Neighbor Islands. In 2014, 54 percent of U.S. visitors gave excellent ratings to O’ahu, down 2.9 points from last year.
- Hawai’i Island’s rating of 60.9 percent also declined (-2.4 points) compared to 2013.
- In contrast, ratings for Kaua’i and Maui improved 2.6 points and 2.4 points, respectively.

**Figure 11: Island Experience Rated as “Excellent” – Japanese Visitors
(Percentage of visitors by island)**



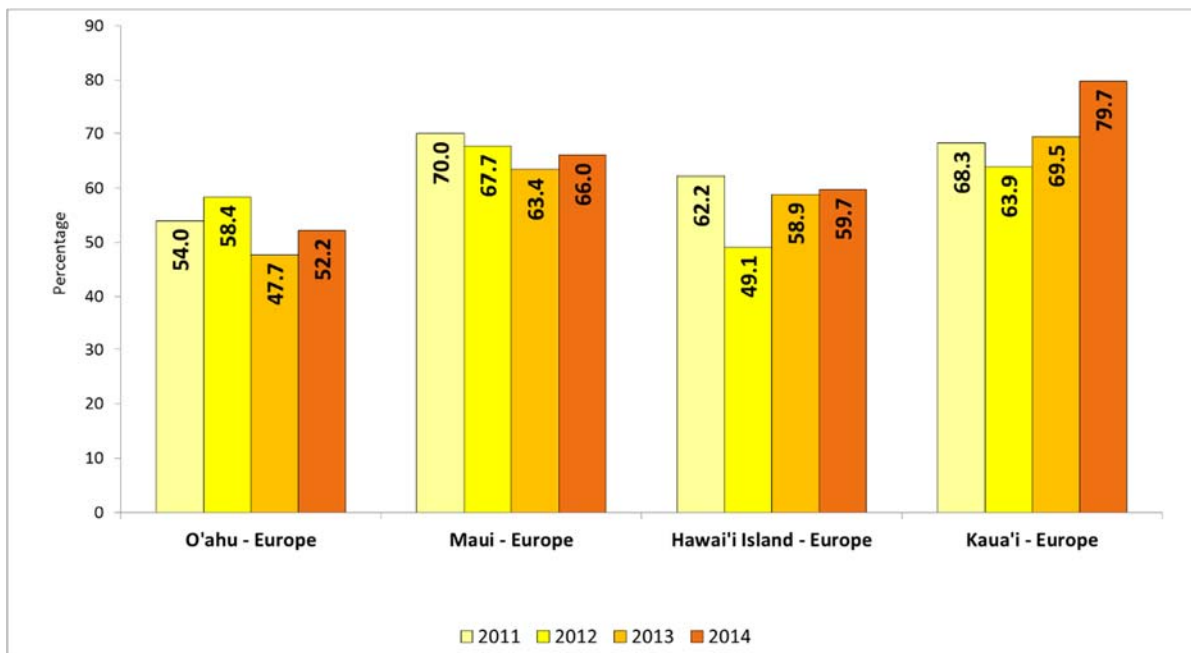
- The percentage of Japanese visitors who gave excellent ratings to Maui improved 5.1 points to 57.4 percent, similar to historical levels of satisfaction.
- O'ahu's rating dropped slightly (-1.1 points) to 56.2 percent.
- Hawai'i Island has consistently been the highest rated island among Japanese visitors for the past three years.
- Ratings for Kaua'i have generally been lower compared to other islands. In 2014, Kauai's rating declined 2.1 points to 47.6 percent. However, it should be noted that fewer Japanese respondents visited Kaua'i than the other islands.

**Figure 12: Island Experience Rated as “Excellent” – Canadian Visitors
(Percentage of visitors by island)**



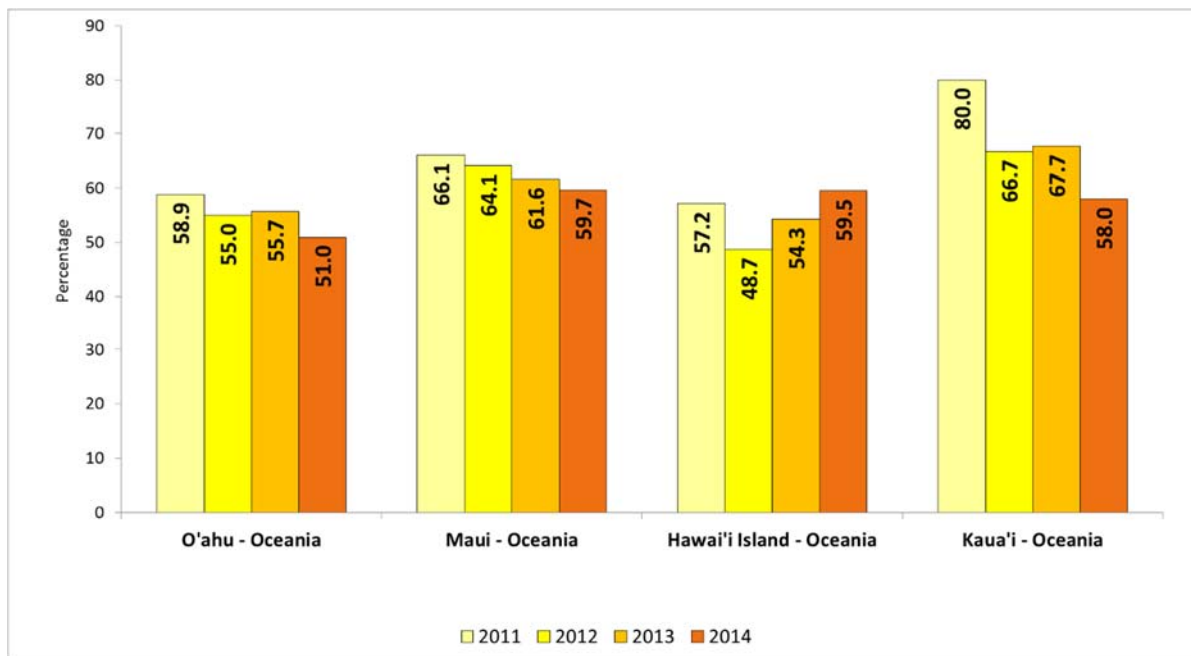
- O'ahu's excellent rating from Canadian visitors in 2014 improved 1.7 points to 55 percent.
- Maui's 64.2 percent was a decrease of 1.3 points compared to 2013.
- Ratings for Kaua'i (62.1%) and Hawai'i Island (59.5%) changed very little from last year.

**Figure 13: Island Experience Rated as “Excellent” – European Visitors
(Percentage of visitors by island)**



- Kaua'i's rating by European visitors improved 10.2 points to 79.7 percent in 2014.
- Percentages for Maui (+2.6 points to 66%) and O'ahu (+4.5 points to 52.2%) also increased while Hawai'i Island's rating was similar to 2013.

**Figure 14: Island Experience Rated as “Excellent” – Oceania Visitors
(Percentage of visitors by island)**



- Excellent ratings by Oceania visitors in 2014 for Hawai'i Island improved 5.2 percent to 59.5 percent.
- However, ratings for Kaua'i (-9.7 points), O'ahu (-4.7 points) and Maui (-1.9 points) were lower compared to 2013.

ACTIVITY PARTICIPATION

The VSAT survey measures visitor participation for 50 different activities in seven different geographic areas of the state. Percentages represent visitors who participated in at least one of the activities in the group at least once during their 2014 visit to Hawai'i (See the companion Excel workbook of 2014 VSAT data tables posted on the HTA website).

- Nearly all (96-99%) visitors in 2014 did some shopping while in Hawai'i. The VSAT survey listed a variety of shopping venues ranging from swap meet, supermarkets to designer boutiques.
- At least 95 percent of visitors engaged in one or more entertainment and dining activities, including various dining options, night clubs and stage shows.
- Between 83 and 98 percent of visitors took part in recreation, which included all beach and water activities as well as running, hiking, and backpacking.
- Between 88 and 97 percent of visitors took part in sightseeing activities which covers self-guided tours to boat/submarine, whale watching tours.
- Between 44 and 80 percent of visitors participated in history, culture and fine arts activities. These activities are unique to a Hawai'i visit, including historical sites, Polynesian/hula shows, lū'au, music/hula lessons and art/craft fairs and festivals.
- Modes of transportation, which 91 to 98 percent of these visitors utilized, included airport shuttles, Waikiki trolleys and tour buses.

LEISURE VISITOR ACTIVITIES BY MMA

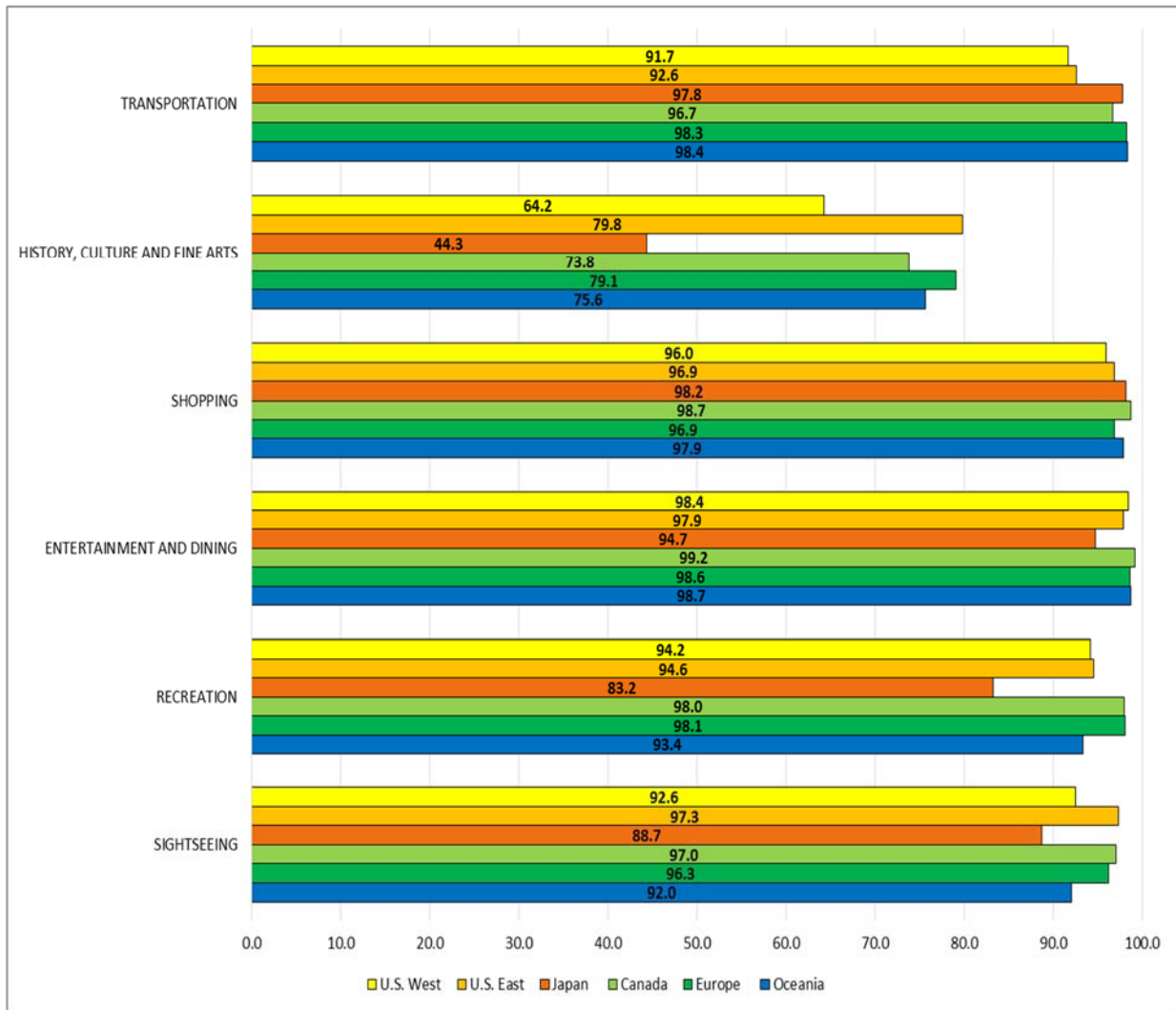
Canada: These visitors had the highest participation rate in entertainment and dining (99.2%), shopping (98.7%), and recreation (98%) activities among the MMAs. Most participated in sightseeing activities (97%) or used some mode of transportation (96.7%). Three out of four Canadian respondents participated in history, culture and fine arts activities (73.7%).

Europe: Nearly all European respondents participated in entertainment and dining (98.6%), recreation (98.1%), shopping (96.9%) and sightseeing (96.3%) activities and utilized some type of transportation (98.3%) during their stay. Eight out of ten visitors participated in history, culture and fine arts (79.1%) activities.

Oceania: Similar to their European counterparts, most respondents from Oceania participated in entertainment and dining (98.7%), shopping (97.9%) and used some type of transportation (98.4%). Nine out of ten participated in recreation (93.4%) and sightseeing (92%), while 75.6 percent participated in history, culture and fine arts activities.

Japan: These visitors showed the lowest participation rates for entertainment and dining (94.7%), sightseeing (88.7%), recreation (83.2%), and history, culture and fine arts (44.3%) activities among the visitor markets. On the other hand, their participation in shopping (98.2%) and usage of transportation (97.8%) were quite high.

Figure 15: Visitor Activities Statewide by MMA³
(Percentage of visitors, 2014)



U.S. East: These visitors had the highest participation rate in sightseeing (97.3%) and history, culture and fine arts (79.8%) activities among the MMAs. Most participated in entertainment (97.9%) activities and used some mode of transportation (92.6%) during their stay.

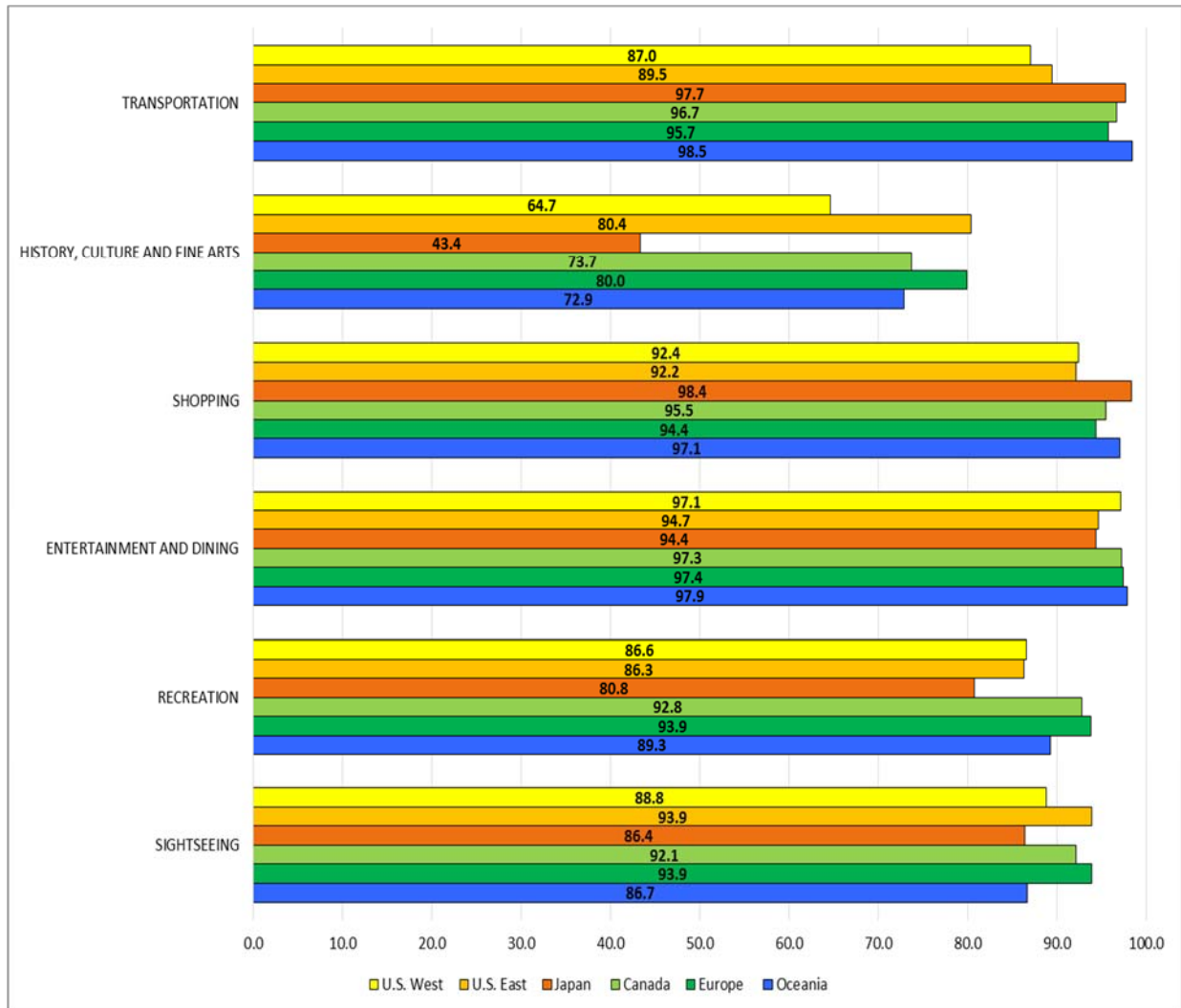
U.S. West: Visitors from U.S. West showed the lowest participation rates for shopping (96%) and transportation usage (91.7%) among the visitor markets. Nine out of ten participated in sightseeing activities (92.6%) and 64.2 percent participated in culture and fine arts activities.

³ Business activities were excluded from this figure.

LEISURE VISITOR ACTIVITIES BY ISLAND

Activity levels were calculated for each island. Data presented are the percentage of visitors to each island who participated in at least one of the activities in each group during their stay on that island⁴.

Figure 16: Visitor Activities by MMA – O‘ahu⁵
(Percentage of visitors, 2014)

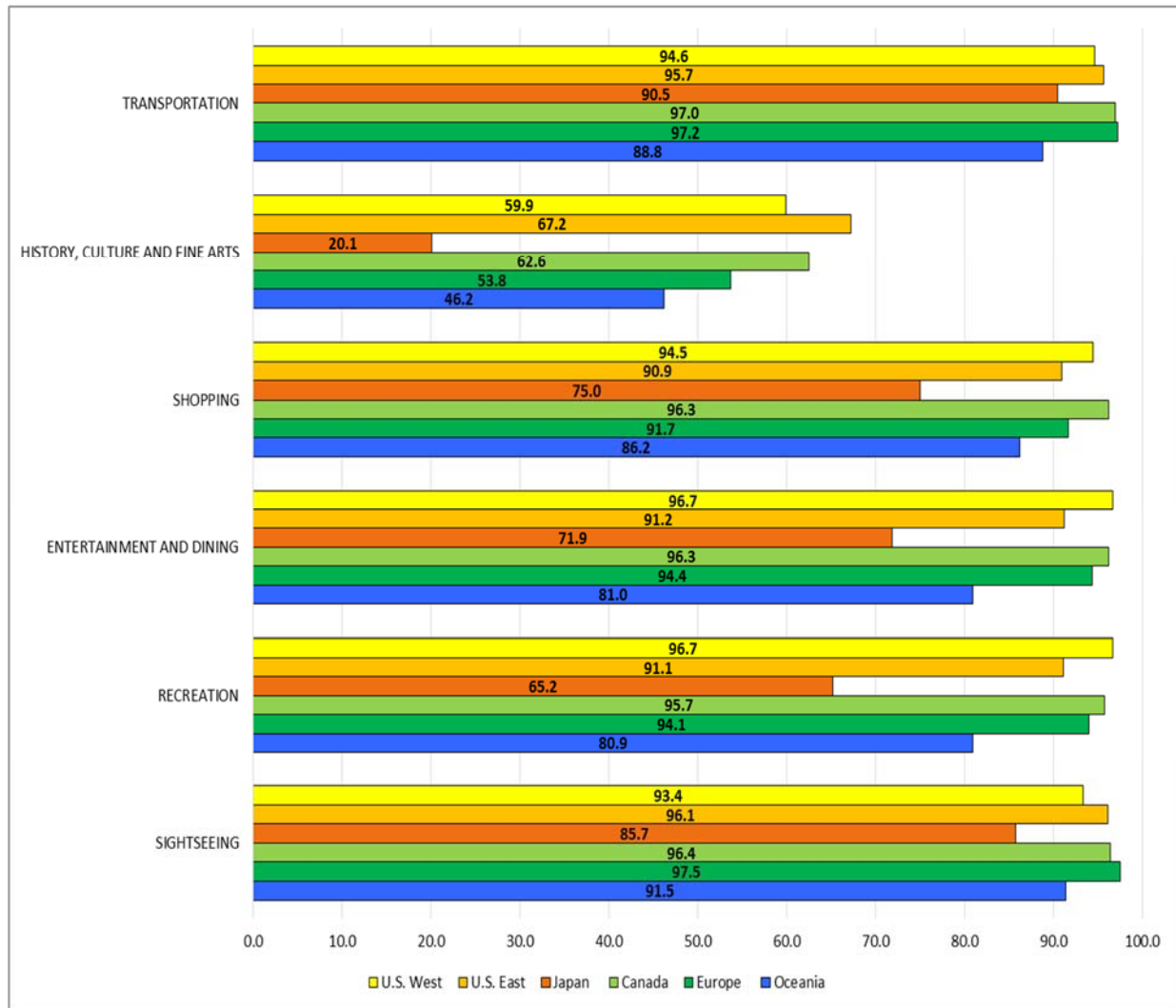


O‘ahu: As expected, participation rates in shopping, and entertainment and dining activities by most visitors were higher on O‘ahu than on the Neighbor Islands. At least 80 percent of visitors across all markets engaged in sightseeing, recreation, and used some mode of transportation while on O‘ahu. The majority of U.S. Canadian, European and Oceania visitors, and 43 percent of Japanese visitors participated in history, cultural and fine arts activities on this island.

⁴ Participation in activities on Moloka‘i and Lāna‘i were omitted here due to low sample sizes. Statistics on the 50 activities for each of the six islands are reported in the companion Excel workbook of 2014 VSAT data.

⁵ Business activities were excluded from this figure.

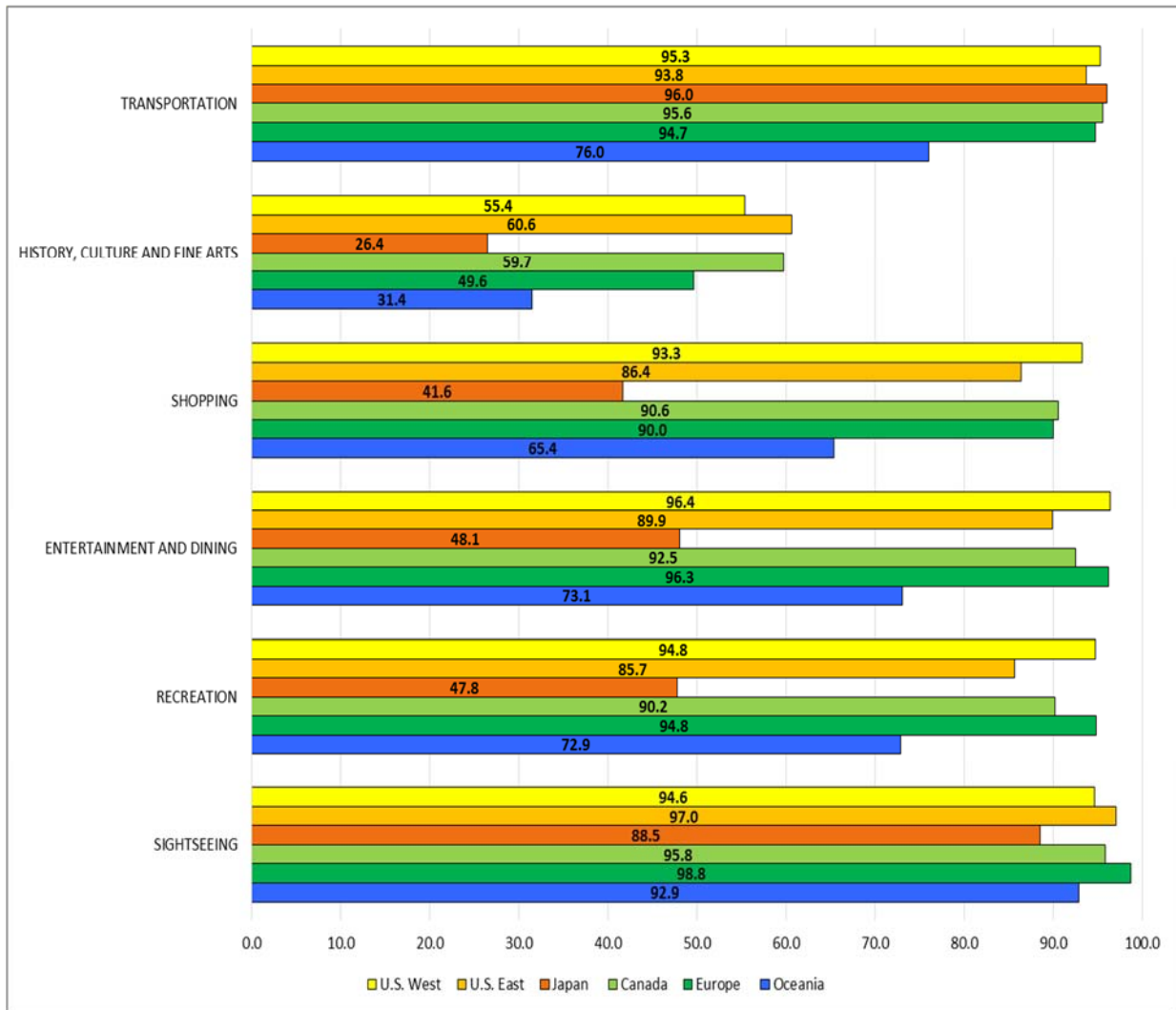
Figure 17: Visitor Activities by MMA – Maui⁶
(Percentage of visitors, 2014)



Maui: Nearly all visitors on Maui participated in sightseeing activities and utilized some type of transportation. The majority of visitors across all markets also engaged in entertainment and dining, recreation and shopping activities. About half of U.S. West, U.S. East, Canadian, European and Oceania visitors participated in history, cultural and fine arts activities while on Maui but only 20 percent of Japanese visitors did so.

⁶ Business activities were excluded from this figure.

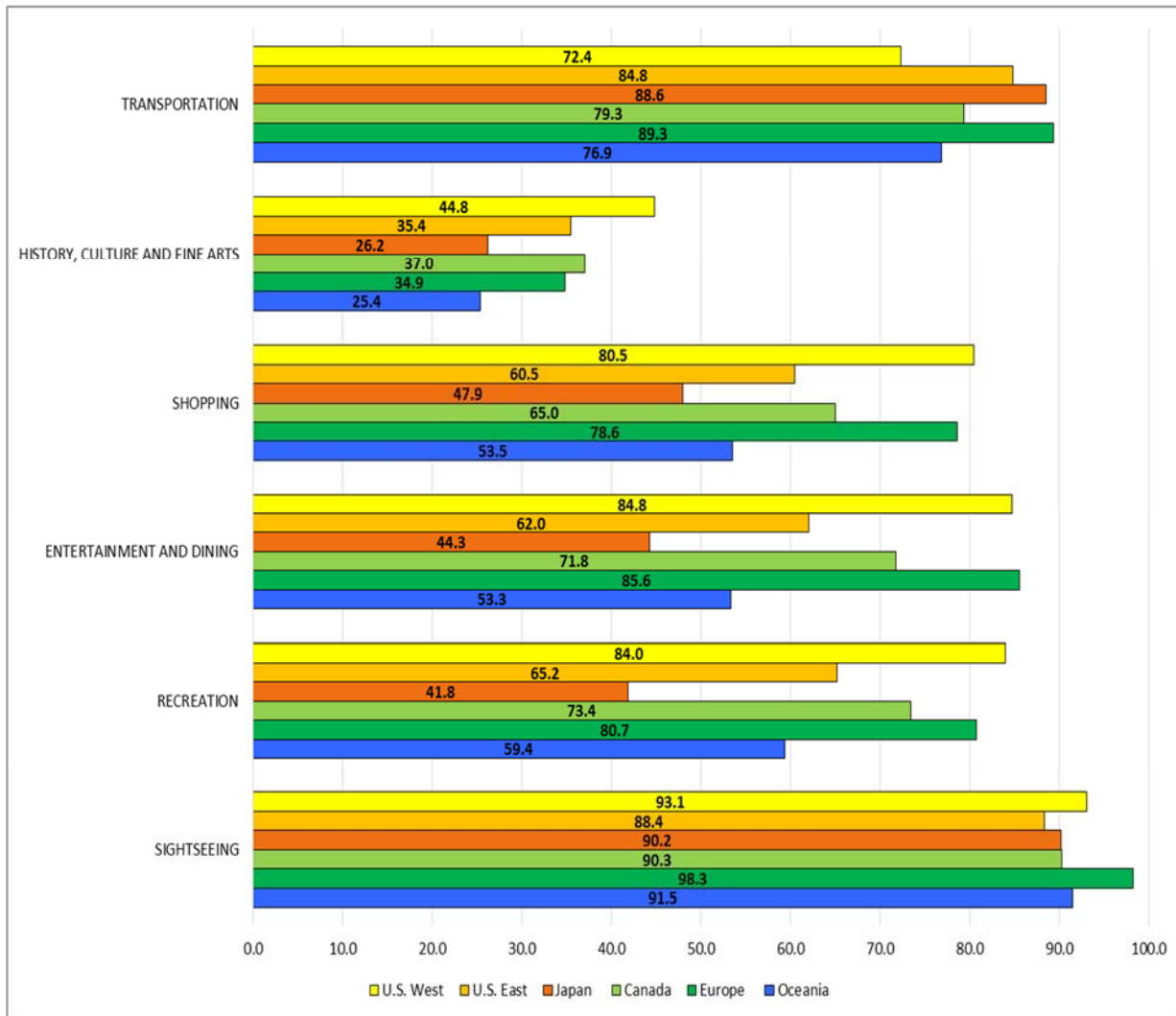
Figure 18: Visitor Activities by MMA – Kaua‘i⁷
(Percentage of visitors, 2014)



Kaua‘i: Most visitors went sightseeing and used some form of transportation while on Kauai. The majority of U.S., Canadian, European and Oceania visitors also participated in entertainment and dining, recreation and shopping activities. Among Japanese visitors, participation rate in each of these activities was less than 50 percent.

⁷ Business activities were excluded from this figure.

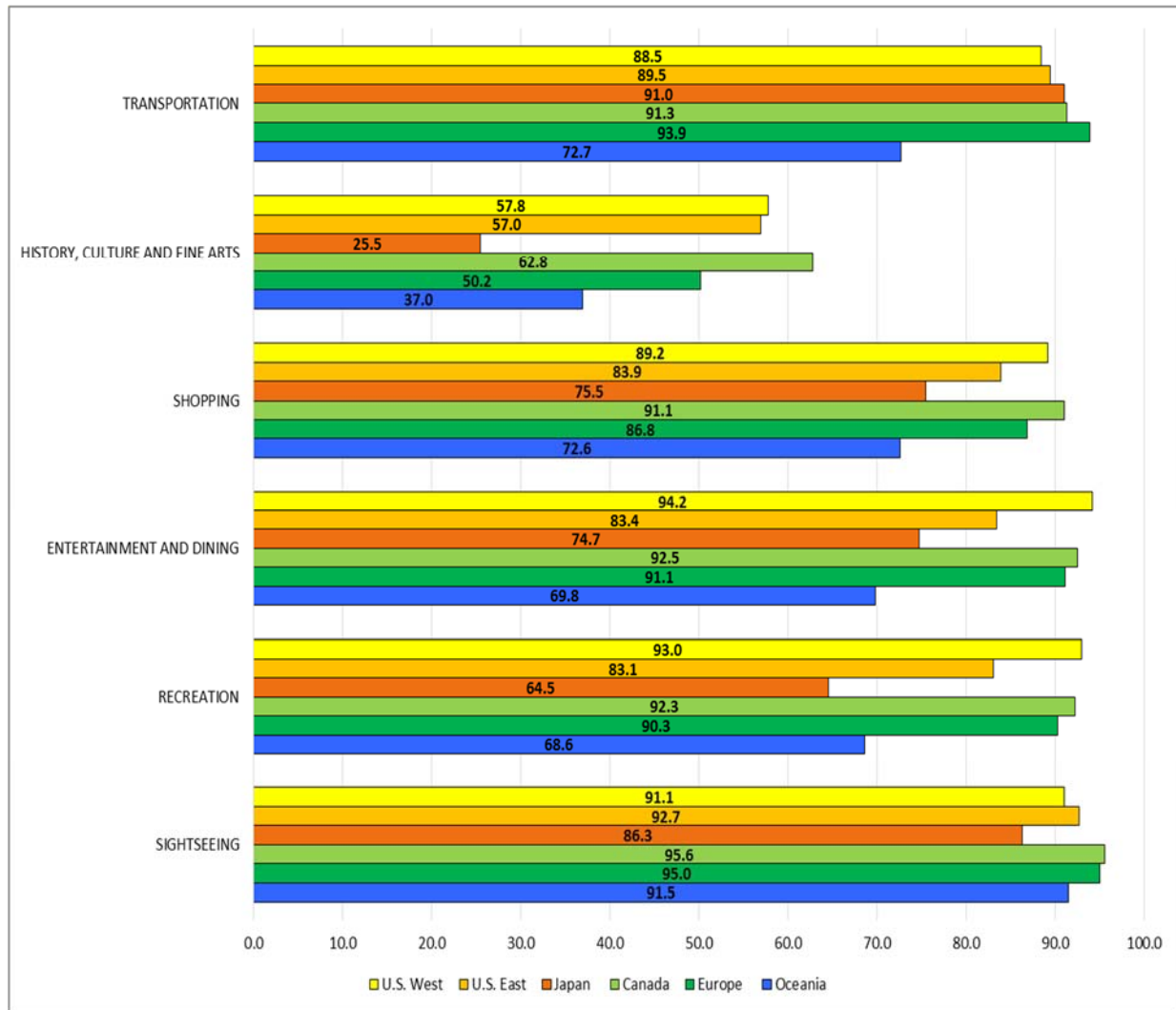
Figure 19: Visitor Activities by MMA – Hilo⁸
(Percentage of visitors, 2014)



Hawai'i Island (Hilo Side): Nearly all visitors to the Hilo side of Hawai'i Island went sightseeing and at least 70 percent used some type of transportation. In terms of recreation, entertainment and dining, and shopping activities, participation from U.S. West and European visitors were similarly high at about 80 percent. Participation rates in these activities were in the 60 to 70 percent range for U.S. East and Canadian visitors and were in the 40 to 50 percent range for Oceania and Japanese visitors.

⁸ Business activities were excluded from this figure.

Figure 20: Visitor Activities by MMA – Kona⁹
(Percentage of visitors, 2014)



Hawai'i Island (Kona Side): Most visitors to the Kona side of Hawai'i Island went sightseeing and over 70 percent of all visitors used some mode of transportation. Participation from U.S. West, Canadian and European visitors in recreation, entertainment and dining, and shopping activities were similarly high at about 90 percent. Nearly 80 percent of U.S. East visitors and close to 70 percent of Japanese and Oceania visitors participated in these activities while in Kona.

⁹ Business activities were excluded from this figure.

TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. There were no significant changes in trip planning behaviors of 2014 respondents compared to respondents in 2013. Japanese visitors typically decide to take a vacation and conduct their trip planning in a relatively short time. Visitors from U.S. West, U.S. East, Canada, Europe, and Oceania tend to plan farther in advance.

U.S. West

- Six out of ten U.S. West visitors in 2014 decided to take a vacation (66.9%), to visit Hawai'i (66.4%), and decided on the islands they wanted to visit (64.6%) four months or more before arrival.
- The majority (61.1%) of U.S. West visitors made rental car reservations, and close to half made airline reservations (48.7%), purchased tickets (49.2%), and reserved accommodations (43.3%) one to three months before arriving in the islands.
- Nearly 57 percent also purchased tour or attraction packages one to three months out, but 25.1 percent waited until less than one month before arrival. Additionally, 28.9 percent purchased packaged tours during their trip.

Figure 21: Trip Decision Making, U.S. West Visitors, 2014¹⁰

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 3.8% | 21.4% | 9.4% | 32.4% | 30.8% | 2.2% | 0.0% |
| Decide to visit Hawai'i | 4.1% | 20.4% | 9.7% | 32.2% | 30.8% | 2.8% | 0.0% |
| Decide on which islands to visit | 3.4% | 18.3% | 10.2% | 32.6% | 32.6% | 2.8% | 0.4% |
| Set date for the trip | 1.8% | 14.0% | 10.4% | 32.8% | 38.2% | 2.9% | 0.2% |
| Choosing a place to stay | 2.4% | 13.5% | 8.8% | 32.0% | 40.0% | 3.3% | 0.4% |
| Make airline reservations | 0.1% | 4.6% | 7.7% | 35.3% | 48.7% | 3.6% | 0.1% |
| Purchase tickets | 0.2% | 4.3% | 7.8% | 34.7% | 49.2% | 3.9% | 0.5% |
| Make accommodation reservations | 1.7% | 10.9% | 9.4% | 31.1% | 43.3% | 3.6% | 1.1% |
| Make rental car reservations | 0.1% | 3.0% | 4.7% | 24.2% | 61.1% | 6.9% | 2.8% |
| Purchase tour or attraction packages | 0.0% | 0.8% | 1.8% | 15.7% | 56.6% | 25.1% | 28.9% |
| Other | 4.3% | 10.5% | 4.2% | 9.7% | 52.2% | 19.2% | 1.9% |

¹⁰ Percent of visitors with each response. One choice was reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they were recorded in both places.

U.S. East

- A higher percentage of U.S. East visitors started trip planning earlier than their U.S. West counterparts. In 2014, four out of ten U.S. East visitors decided on a vacation (43.7%), to visit Hawai'i (43.2%) and decided on the islands they wanted to visit (37.7%) at least seven months before arrival.
- Four out of ten visitors made airlines reservations (43.8%), purchased tickets (44.3%), and made accommodation reservations (40.9%) one to three months before arrival.
- The majority of U.S. East visitors made rental car reservations (64.2%) three months or less before the trip.
- Close to 60 percent purchased tour or attraction packages within one to three months of arrivals, but 19.1 percent waited until less than one month before arrival. In addition, 37.7 percent purchased tour packages while on vacation.

Figure 22: Trip Decision Making, U.S. East Visitors, 2014¹¹

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 5.2% | 26.1% | 12.4% | 30.3% | 24.8% | 1.2% | 0.0% |
| Decide to visit Hawai'i | 5.9% | 24.8% | 12.5% | 30.5% | 25.2% | 1.2% | 0.0% |
| Decide on which islands to visit | 3.9% | 20.7% | 13.1% | 31.8% | 28.6% | 1.8% | 0.4% |
| Set date for the trip | 2.3% | 15.6% | 13.7% | 33.7% | 32.3% | 2.3% | 0.1% |
| Choosing a place to stay | 1.9% | 15.2% | 12.7% | 31.2% | 36.9% | 2.1% | 0.2% |
| Make airline reservations | 0.3% | 7.2% | 11.6% | 34.7% | 43.8% | 2.4% | 0.1% |
| Purchase tickets | 0.2% | 6.8% | 11.4% | 34.6% | 44.3% | 2.7% | 0.3% |
| Make accommodation reservations | 1.3% | 11.7% | 12.2% | 31.4% | 40.9% | 2.6% | 0.8% |
| Make rental car reservations | 0.2% | 4.2% | 6.4% | 25.0% | 57.2% | 7.0% | 3.7% |
| Purchase tour or attraction packages | 0.3% | 1.6% | 2.9% | 15.7% | 59.8% | 19.8% | 37.7% |
| Other | 0.1% | 2.2% | 7.1% | 21.5% | 50.0% | 19.1% | 1.7% |

¹¹ Percent of visitors with each response. One choice was reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

Japan

- In 2014 Japanese visitors continued to have a shortest planning and booking window among the visitors surveyed. Most of their travel decisions were made between 1 to 3 months before the vacation date.
- Less than three months before arrival, 46.6 percent decided to take a vacation, 49.8 percent decided to visit Hawai'i, 54.2 percent decided on the islands they wanted to visit and 60 percent settled on the dates of travel.
- Also within three months of their trip, most Japanese visitors made airline reservations (65.7%), purchased airline tickets (70.6%), and made accommodation reservations (67.5%).
- Less than 30 days before arriving in Hawai'i, 23.6 percent of Japan visitors made rental car reservations, and 24.7 percent purchased tour and attraction packages. About 20 percent also purchased tour packages during their trip.

Figure 23: Trip Decision Making, Japan Visitors, 2014¹²

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 1.7% | 12.7% | 5.4% | 33.5% | 41.9% | 4.7% | 0.0% |
| Decide to visit Hawai'i | 1.8% | 11.6% | 4.7% | 32.2% | 44.9% | 4.9% | 0.0% |
| Decide on which islands to visit | 1.2% | 10.3% | 4.8% | 29.5% | 48.9% | 5.4% | 0.4% |
| Set date for the trip | 0.7% | 7.1% | 4.4% | 27.8% | 53.7% | 6.3% | 1.1% |
| Choosing a place to stay | 0.5% | 3.8% | 4.7% | 24.7% | 58.7% | 7.6% | 0.0% |
| Make airline reservations | 0.8% | 5.2% | 4.2% | 24.2% | 58.0% | 7.7% | 0.3% |
| Purchase tickets | 0.6% | 3.2% | 4.2% | 21.4% | 61.2% | 9.3% | 0.1% |
| Make accommodation reservations | 0.7% | 4.7% | 4.6% | 22.6% | 59.4% | 8.2% | 0.2% |
| Make rental car reservations | 0.3% | 0.9% | 2.7% | 9.4% | 63.1% | 23.6% | 2.0% |
| Purchase tour or attraction packages | 0.3% | 0.5% | 0.6% | 8.3% | 65.7% | 24.7% | 19.5% |
| Other | 0.0% | 4.8% | 3.3% | 17.8% | 41.9% | 32.2% | 1.2% |

¹² Percent of visitors with each response. One choice was reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

Canada

- In 2014, Canadian visitors' trip planning patterns were similar to those of U.S. East visitors. At least seven months before arrival, four out of ten Canadian visitors decided on a vacation (40.2%) decided to visit Hawai'i (40.1%) and decided on which islands to visit (35.6%).
- Four out of ten Canadian visitors made airline reservations (44.8%), purchased tickets (45.3%), and reserved accommodations (41.9%) one to three months before their trip.
- The majority made rental car reservations (59.6%) around one to three months out. Some waited until less than one month of arrival (7.7%) or reserved their rental cars during their vacation (3.3%).
- Over half of Canadian visitors purchased tour or attraction packages within one to three months of arrivals, but 28.1 percent waited until less than one month before arrival. In addition, 45 percent purchased tour packages while they were on vacation.

Figure 24: Trip Decision Making, Canada, 2014¹³

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 4.2% | 23.2% | 12.8% | 29.0% | 28.7% | 2.1% | 0.0% |
| Decide to visit Hawai'i | 5.1% | 23.0% | 12.0% | 27.4% | 30.3% | 2.2% | 0.0% |
| Decide on which islands to visit | 3.3% | 20.5% | 11.8% | 28.8% | 33.1% | 2.5% | 0.3% |
| Set date for the trip | 2.4% | 16.6% | 12.6% | 30.3% | 34.8% | 3.2% | 0.2% |
| Choosing a place to stay | 2.2% | 14.7% | 12.4% | 27.1% | 40.3% | 3.4% | 0.3% |
| Make airline reservations | 0.2% | 7.2% | 12.2% | 32.5% | 44.8% | 3.0% | 0.1% |
| Purchase tickets | 0.2% | 6.8% | 12.4% | 32.3% | 45.3% | 3.0% | 0.2% |
| Make accommodation reservations | 1.6% | 12.4% | 12.1% | 28.2% | 41.9% | 3.8% | 1.0% |
| Make rental car reservations | 0.2% | 3.3% | 5.5% | 23.7% | 59.6% | 7.7% | 3.3% |
| Purchase tour or attraction packages | 0.0% | 1.9% | 2.7% | 12.1% | 55.2% | 28.1% | 45.0% |
| Other | 0.5% | 5.1% | 8.4% | 10.9% | 35.6% | 39.5% | 2.1% |

¹³ Percent of visitors with each response. One choice was reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

Europe

- The planning profile among European visitors in 2014 showed that many took between 4 to 6 months to decide to take a vacation (36.8%), decide to visit Hawai'i (35.2%), and decide on the islands they wanted to visit (35.2%).
- One out of three visitors made airline reservations (37.1%), purchased tickets (37.5%), and reserved accommodations (37.9%) one to three months before their trip.
- Over half of the visitors made rental car reservations (52.7%) one to three months out, while others (10%) waited until less than one month before their trip.
- Half of the visitors from Europe purchased tour and attraction packages during their trip (50.4%).

Figure 25: Trip Decision Making, Europe Visitors, 2014¹⁴

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 4.3% | 19.9% | 15.4% | 36.8% | 23.2% | 0.5% | 0.0% |
| Decide to visit Hawai'i | 4.4% | 18.9% | 14.8% | 35.2% | 25.3% | 1.4% | 0.0% |
| Decide on which islands to visit | 2.8% | 14.1% | 14.6% | 37.5% | 28.9% | 2.0% | 0.5% |
| Set date for the trip | 2.3% | 12.3% | 14.9% | 36.3% | 31.9% | 2.4% | 0.1% |
| Choosing a place to stay | 0.8% | 10.3% | 14.6% | 34.1% | 37.3% | 2.9% | 0.4% |
| Make airline reservations | 0.3% | 8.9% | 15.2% | 36.0% | 37.1% | 2.6% | 0.0% |
| Purchase tickets | 0.2% | 9.5% | 14.5% | 35.5% | 37.5% | 2.7% | 0.2% |
| Make accommodation reservations | 0.4% | 9.3% | 15.1% | 31.4% | 37.9% | 5.9% | 1.4% |
| Make rental car reservations | 0.6% | 4.2% | 8.4% | 24.1% | 52.7% | 10.0% | 5.3% |
| Purchase tour or attraction packages | 0.1% | 4.5% | 5.0% | 17.7% | 44.0% | 28.7% | 50.4% |
| Other | 0.0% | 5.8% | 29.8% | 4.2% | 45.0% | 15.3% | 2.0% |

¹⁴ Percent of visitors with each response. One choice was reported for number of days “before the trip.”

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

Oceania

- Oceania visitors in 2014 showed a longer planning and booking window compared to other visitor markets. Nearly half of these visitors took 7 months or longer to decide on a vacation (48.8%), to visit Hawai'i (45.2%), and which islands they wanted to visit (40.3%).
- One out of three visitors made airline reservations (38.5%), purchased airline tickets (39.2%), and reserved accommodations (37.8%) four to six months before their trip.
- Four out of ten visitors made rental car reservations (46.4%) within one to three months, while some (16.3%) waited until less than one month before their trip.
- Four out of ten Oceania visitors purchased tour or attraction packages within one to three months of arrival, but 19.6 percent waited until less than a month before. In addition, 46.1 percent purchased tour packages while they were on vacation.

Figure 26: Trip Decision Making, Oceania Visitors, 2014¹⁵

| Trip planning elements | Began this planning activity... | | | | | | |
|---------------------------------------|---------------------------------|-----------------|---------------|---------------|---------------|-------------------|-----------------|
| | before the trip | | | | | | during the trip |
| | More than 1 year | 10 to 12 months | 7 to 9 months | 4 to 6 months | 1 to 3 months | less than 1 month | |
| Decide to take vacation/pleasure trip | 6.4% | 25.9% | 16.5% | 33.9% | 16.1% | 1.2% | 0.0% |
| Decide to visit Hawai'i | 5.6% | 22.6% | 17.1% | 35.7% | 18.2% | 0.8% | 0.0% |
| Decide on which islands to visit | 3.9% | 20.3% | 16.1% | 37.2% | 21.1% | 1.3% | 0.3% |
| Set date for the trip | 2.7% | 19.5% | 17.5% | 37.7% | 21.6% | 1.0% | 0.2% |
| Choosing a place to stay | 1.0% | 11.6% | 15.2% | 37.5% | 32.8% | 1.9% | 0.2% |
| Make airline reservations | 0.7% | 14.1% | 17.5% | 38.5% | 28.0% | 1.3% | 0.1% |
| Purchase tickets | 0.5% | 13.2% | 17.2% | 39.2% | 28.6% | 1.3% | 0.1% |
| Make accommodation reservations | 0.7% | 10.8% | 13.8% | 37.8% | 34.8% | 2.1% | 0.9% |
| Make rental car reservations | 0.1% | 4.9% | 8.4% | 23.9% | 46.4% | 16.3% | 5.7% |
| Purchase tour or attraction packages | 0.0% | 6.2% | 9.8% | 22.7% | 41.7% | 19.6% | 46.1% |
| Other | 0.0% | 3.3% | 11.1% | 41.2% | 25.1% | 19.3% | 1.0% |

¹⁵ Percent of visitors with each response. One choice was reported for number of days "before the trip."

Some planning activities may have taken place both before and during the trip and they are recorded in both places.

Sources of Information Used to Plan Trip

Visitors to Hawai'i use a wide variety of resources to plan their trip to the islands. Table 7 shows the sources of information used by 2014 visitors from each market.

**Figure 27: Sources of Information Used for Trip Planning, 2014
(Percentage of Total Visitors by MMA)**

| | Major Market Areas | | | | | |
|---|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Personal experience | 68.6% | 56.0% | 38.2% | 60.6% | 43.1% | 45.3% |
| Recommendations from friends or relatives | 51.3% | 58.9% | 33.2% | 54.4% | 46.2% | 50.2% |
| Information from hotels or resorts | 45.7% | 54.0% | 33.3% | 50.2% | 60.1% | 63.9% |
| Online travel booking site | 40.6% | 39.5% | 35.1% | 55.4% | 49.9% | 48.0% |
| Online webpage or blog covering Hawaii | 32.1% | 40.3% | 46.4% | 45.7% | 55.3% | 37.8% |
| Information from airline/commercial carriers | 40.6% | 42.3% | 24.2% | 43.7% | 43.4% | 45.3% |
| Books | 23.6% | 28.8% | 46.8% | 35.5% | 52.2% | 16.6% |
| Travel Agents | 12.5% | 24.5% | 62.0% | 22.1% | 44.3% | 69.2% |
| Magazines | 18.8% | 20.4% | 57.1% | 22.6% | 24.2% | 18.4% |
| Companies specializing in packaged tours | 17.4% | 24.8% | 30.6% | 24.6% | 27.0% | 31.4% |
| Smartphone or tablet applications relevant to your trip | 23.4% | 25.5% | 19.8% | 23.0% | 28.3% | 21.4% |
| Hawaii visitor bureaus website | 15.2% | 23.4% | 18.0% | 24.3% | 29.6% | 21.6% |
| Online social networking site | 9.1% | 10.9% | 7.5% | 13.5% | 16.1% | 11.6% |
| Newspapers | 7.9% | 8.5% | 4.9% | 10.0% | 13.8% | 10.9% |

U.S. Visitors: Personal experience and recommendations from friends and relatives were the most frequently used sources among U.S. West and U.S. East visitors in trip planning. Information from hotels and resorts, information for airlines, online travel booking sites were also heavily utilized. A higher percentage of U.S. East visitors used online websites and blogs (40.3%) compared to their U.S. West counterparts (32.1%). For U.S. West visitors, a similar percentage used smartphones and tablets (23.4%) and guide books (23.6%) in trip planning. Only 12.5 percent sought assistance from travel agents, the lowest among the visitor markets. For U.S. East visitors, about the same percentage used smartphones and tablets (25.5%), companies specializing in packaged tours (24.8%) and travel agents (24.5%) for trip planning.

Japanese visitors: These visitors relied less on personal experience or recommendations from friends and relatives but relied more on travel agents (62%) in trip planning compared to U.S. and Canadian visitors. Magazines (57.1%), guide books (46.8%), and online webpages or blogs (46.4%) were also popular with Japanese visitors in their trip planning. Japanese visitors were less likely to use information from airlines (24.2%) compared to other visitor groups.

Canadian visitors: Canadian respondents in 2014 relied most heavily on personal experience (60.6%), online travel booking sites (55.4%) and recommendations from friends or relatives (54.4%) when

planning for their trip. In addition, many Canadians used information from hotels and resorts (50.2%), online webpages or blogs covering Hawai'i (45.7%) and information from airlines (43.7%). Only 22.1 percent used travel agents.

European Visitors: Information from hotels and resorts (60.1%) was the most frequently used source among European visitors in 2014 for trip planning. Online webpages or blogs (55.3%), guide books (52.2%) and online travel booking sites (49.9%) were also heavily used. A similar percentage of European visitors used travel agents (44.3%) and information from airlines (43.4%) and their personal experience (43.1%).

Oceania Visitors: Similar to the Japanese, visitors from Oceania also used travel agents (69.2%) as their primary source of information. These visitors also heavily relied on information from hotels and resorts (63.9%). Recommendations from family and friends (50.2%), online travel booking sites (48%) and information from airlines (45.3%) were important planning tools for about half of these visitors. Oceania visitors also sought information about Hawai'i from online webpages or blogs (37.8%) and companies specializing in packaged tours (31.4%).

When Accessed Sources of Information About Hawai'i

This section looks at when 2014 visitors accessed the various sources of information about Hawai'i. There were some similarities across visitor markets, such as the heavy reliance on personal experience and recommendation from friends or relatives for information prior to their trip. While their trip was in progress, visitors used personal experience, online travel booking sites, and information provided by hotels and resorts. Usage of other resources varied by visitor markets. Very few visitors seek information about Hawai'i after their trip (less than 6% overall).

**Figure 28: When Accessed Sources of Information about Hawai'i – U.S. West 2014
(Percentage of U.S. West visitors)**

| | Before the trip | During the trip | After the trip |
|---|-----------------|-----------------|----------------|
| Personal experience | 59.4% | 25.2% | 0.0% |
| Recommendations from friends or relatives | 42.5% | 18.0% | 0.0% |
| Online travel booking site | 37.6% | 4.0% | 0.3% |
| Information from airline/commercial carriers | 36.9% | 3.1% | 0.0% |
| Online webpage or blog covering Hawai'i | 34.4% | 13.2% | 0.0% |
| Information from hotels or resorts | 27.4% | 9.8% | 1.2% |
| Travel Agents | 18.1% | 13.6% | 0.9% |
| Books | 12.8% | 3.9% | 0.6% |
| Magazines | 12.2% | 17.7% | 1.4% |
| Hawai'i visitor bureaus website | 11.0% | 1.2% | 0.0% |
| Companies specializing in packaged tours | 10.8% | 6.7% | 0.0% |
| Smartphone or tablet applications relevant to your trip | 8.3% | 12.3% | 0.7% |
| Online social networking site | 7.2% | 4.0% | 1.0% |
| Newspapers | 2.6% | 5.6% | 0.5% |

During the trip, many U.S. West visitors used magazines (17.7%), travel agents (13.6%), online webpages or blogs (13.2%), and smartphones or tablets (12.3%) to find information about Hawai'i.

Figure 29: When Accessed Sources of Information about Hawai'i – U.S. East 2014
(Percentage of U.S. East visitors)

| | Before the trip | During the trip | After the trip |
|---|-----------------|-----------------|----------------|
| Personal experience | 51.6% | 18.1% | 0.0% |
| Recommendations from friends or relatives | 47.1% | 23.4% | 0.0% |
| Online travel booking site | 39.8% | 18.8% | 0.0% |
| Information from airline/commercial carriers | 39.5% | 3.7% | 0.0% |
| Online webpage or blog covering Hawai'i | 36.8% | 4.7% | 0.5% |
| Information from hotels or resorts | 36.1% | 12.3% | 1.5% |
| Travel Agents | 23.6% | 13.9% | 1.2% |
| Books | 21.9% | 3.2% | 0.0% |
| Magazines | 19.8% | 6.4% | 0.8% |
| Hawai'i visitor bureaus website | 16.2% | 17.1% | 1.7% |
| Companies specializing in packaged tours | 15.1% | 11.9% | 0.0% |
| Smartphone or tablet applications relevant to your trip | 11.1% | 12.6% | 1.3% |
| Online social networking site | 9.1% | 4.2% | 1.1% |
| Newspapers | 2.9% | 6.2% | 0.5% |

For U.S. East visitors, recommendations from friends and relatives (23.4%), online travel booking sites (18.8%), Hawai'i visitor bureau websites (17.1%), travel agents (13.9%), smart phones or tablets (12.6%), and information from hotels and resorts (12.3%) were also frequently used during the trip.

Figure 30: When Accessed Sources of Information about Hawai'i – Japan 2014
(Percentage of Japanese visitors)

| | Before the trip | During the trip | After the trip |
|---|-----------------|-----------------|----------------|
| Personal experience | 59.6% | 9.3% | 0.0% |
| Recommendations from friends or relatives | 51.0% | 21.1% | 4.3% |
| Online travel booking site | 43.5% | 15.1% | 3.5% |
| Information from airline/commercial carriers | 42.9% | 9.8% | 5.2% |
| Online webpage or blog covering Hawai'i | 34.1% | 7.9% | 0.0% |
| Information from hotels or resorts | 33.8% | 3.0% | 0.9% |
| Travel Agents | 30.2% | 5.9% | 0.0% |
| Books | 25.7% | 6.8% | 0.0% |
| Magazines | 20.9% | 14.7% | 0.0% |
| Hawai'i visitor bureaus website | 20.7% | 4.4% | 0.0% |
| Companies specializing in packaged tours | 17.3% | 1.7% | 1.9% |
| Smartphone or tablet applications relevant to your trip | 14.8% | 9.4% | 1.7% |
| Online social networking site | 6.5% | 2.7% | 1.3% |
| Newspapers | 3.1% | 1.9% | 0.4% |

During the trip, visitors from Japan typically used recommendations from friends or relatives (21.1%), online travel booking sites (15.1%), magazines (14.7%), and smartphones or tablets to access information about Hawai'i. Japanese visitors were more likely than were U.S. visitors to seek additional information about Hawai'i after their trip, most often referring to information from airlines and online travel booking sites.

**Figure 31: When Accessed Sources of Information about Hawai'i – Canada 2014
(Percentage of Canadian Visitors)**

| | Before the trip | During the trip | After the trip |
|---|------------------------|------------------------|-----------------------|
| Personal experience | 52.7% | 6.2% | 0.6% |
| Recommendations from friends or relatives | 51.7% | 24.1% | 0.0% |
| Online travel booking site | 48.9% | 14.8% | 0.0% |
| Information from airline/commercial carriers | 41.0% | 14.6% | 1.8% |
| Online webpage or blog covering Hawai'i | 40.7% | 3.3% | 0.0% |
| Information from hotels or resorts | 37.1% | 16.8% | 0.0% |
| Travel Agents | 28.4% | 19.9% | 1.9% |
| Books | 20.3% | 7.2% | 1.0% |
| Magazines | 20.0% | 2.3% | 0.0% |
| Hawai'i visitor bureaus website | 14.4% | 15.6% | 1.3% |
| Companies specializing in packaged tours | 12.3% | 14.0% | 0.0% |
| Smartphone or tablet applications relevant to your trip | 11.2% | 15.5% | 1.0% |
| Online social networking site | 10.9% | 4.4% | 0.9% |
| Newspapers | 3.4% | 7.6% | 0.5% |

While their trip was in progress, many Canadian visitors used recommendations from friends or relatives (24.1%), travel agents (19.9%), information from hotels and resorts (16.8%), Hawai'i visitor bureaus websites, smartphones or tablets (15.5%), online travel booking sites (14.8%), information from airlines (14.6%) and packaged tour companies (14%) as resources.

**Figure 32: When Accessed Sources of Information about Hawai'i – Europe 2014
(Percentage of European Visitors)**

| | Before the trip | During the trip | After the trip |
|---|------------------------|------------------------|-----------------------|
| Personal experience | 49.4% | 17.4% | 2.6% |
| Recommendations from friends or relatives | 46.6% | 9.2% | 0.1% |
| Online travel booking site | 45.6% | 26.8% | 5.4% |
| Information from airline/commercial carriers | 41.9% | 3.1% | 0.0% |
| Online webpage or blog covering Hawai'i | 38.9% | 25.1% | 0.0% |
| Information from hotels or resorts | 38.3% | 15.3% | 0.0% |
| Travel Agents | 38.2% | 6.2% | 0.0% |
| Books | 30.5% | 21.3% | 0.0% |
| Magazines | 23.9% | 11.2% | 2.1% |
| Hawai'i visitor bureaus website | 17.6% | 10.1% | 0.0% |
| Companies specializing in packaged tours | 15.4% | 21.0% | 1.7% |
| Smartphone or tablet applications relevant to your trip | 13.4% | 5.4% | 2.2% |
| Online social networking site | 10.7% | 15.3% | 1.4% |
| Newspapers | 5.0% | 9.7% | 1.2% |

Many European visitors used online travel booking sites (26.8%), online webpages or blogs (25.1%), guide books (21.3%), magazines (21.3%), information from packaged tour companies (21%), information from hotels or resorts (15.3%) and online social networking sites (15.3%) as resources during their trip. A few European visitors also used online travel booking sites (5.4%) to seek information about Hawai'i after their trip.

**Figure 33: When Accessed Sources of Information about Hawai'i – Oceania 2014
(Percentage of Oceania visitors)**

| | Before the trip | During the trip | After the trip |
|---|------------------------|------------------------|-----------------------|
| Personal experience | 67.1% | 3.7% | 0.0% |
| Recommendations from friends or relatives | 46.2% | 8.2% | 0.0% |
| Online travel booking site | 45.5% | 22.9% | 0.0% |
| Information from airline/commercial carriers | 43.8% | 6.7% | 0.7% |
| Online webpage or blog covering Hawai'i | 41.5% | 4.4% | 0.0% |
| Information from hotels or resorts | 37.5% | 14.4% | 0.0% |
| Travel Agents | 34.7% | 8.4% | 1.5% |
| Books | 16.8% | 6.8% | 0.5% |
| Magazines | 14.6% | 19.0% | 0.0% |
| Hawai'i visitor bureaus website | 14.4% | 5.1% | 0.9% |
| Companies specializing in packaged tours | 13.9% | 13.0% | 1.3% |
| Smartphone or tablet applications relevant to your trip | 11.4% | 8.8% | 0.6% |
| Online social networking site | 9.8% | 3.8% | 1.0% |
| Newspapers | 6.7% | 4.4% | 0.4% |

During their trip, many visitors from Oceania used online travel booking sites (22.9%), magazines (19%), information from hotels or resorts (14.4%) and package tour companies (13%) as resources about Hawai'i.

Ways Visitors Use Sources of Information

The 2014 VSAT survey gathered information on different uses for five important information sources (Internet, guide books, mobile phones and tablets, friends and family, and travel agents). Results are shown in table 14.

The Internet was the dominant source of trip planning information among U.S., Canadian and European visitors in 2014. These visitors heavily used the Internet for airport check in, checking the weather, choosing an airline, estimating cost of trip, making airlines and hotel reservations and planning activities. Internet usage for trip planning was slightly less among Oceania visitors. These visitors mainly used the Internet to check the weather, estimate cost of trip, make hotel reservations and plan activities. Japanese visitors' use of the Internet for trip planning was lower compared to the other markets. The most popular searches were to check the weather, find restaurants and find places to shop.

**Figure 34: How Sources of Information Were Used by MMA, 2014
(Percentage of visitors by MMA)**

| | Major Market Areas | | | | | |
|---------------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Accessing maps and directions / GPS | | | | | | |
| Internet | 41.7% | 45.5% | 43.3% | 52.0% | 46.3% | 42.2% |
| Guide Books | 37.0% | 37.5% | 64.9% | 44.5% | 34.8% | 35.7% |
| Mobile Phone, Tablet Apps | 74.1% | 70.0% | 60.9% | 59.3% | 62.0% | 58.4% |
| Friends,Family | 10.6% | 15.5% | 19.2% | 14.3% | 11.4% | 7.1% |
| Travel Agent | 9.6% | 9.3% | 12.6% | 10.2% | 6.1% | 4.0% |
| Airport check-in | | | | | | |
| Internet | 69.7% | 65.2% | 33.8% | 70.1% | 65.9% | 49.1% |
| Guide Books | 0.1% | 0.9% | 6.3% | 0.8% | 0.3% | 0.9% |
| Mobile Phone, Tablet Apps | 38.0% | 40.4% | 11.8% | 29.4% | 32.4% | 23.9% |
| Friends,Family | 4.8% | 7.4% | 13.3% | 4.6% | 4.8% | 3.6% |
| Travel Agent | 21.2% | 20.9% | 42.3% | 25.6% | 21.8% | 31.7% |
| Checking the weather | | | | | | |
| Internet | 53.1% | 56.4% | 54.0% | 68.9% | 70.0% | 60.8% |
| Guide Books | 1.5% | 4.4% | 5.0% | 3.7% | 5.2% | 5.5% |
| Mobile Phone, Tablet Apps | 82.1% | 84.4% | 68.9% | 80.0% | 73.5% | 79.2% |
| Friends,Family | 5.5% | 7.0% | 5.7% | 5.7% | 5.8% | 2.6% |
| Travel Agent | 5.1% | 4.2% | 6.2% | 2.9% | 3.7% | 3.7% |
| Choosing an airline | | | | | | |
| Internet | 79.9% | 70.6% | 34.7% | 77.5% | 56.9% | 40.6% |
| Guide Books | 0.2% | 0.3% | 1.9% | 0.7% | 0.7% | 0.2% |
| Mobile Phone, Tablet Apps | 4.6% | 4.2% | 4.7% | 4.4% | 3.2% | 1.8% |
| Friends,Family | 17.0% | 16.6% | 20.8% | 14.8% | 10.2% | 10.6% |
| Travel Agent | 39.6% | 55.0% | 76.4% | 50.3% | 75.6% | 81.5% |
| Deciding on your vacation destination | | | | | | |
| Internet | 47.7% | 47.4% | 36.8% | 55.6% | 52.6% | 49.2% |
| Guide Books | 13.6% | 19.4% | 18.2% | 20.7% | 26.3% | 17.4% |
| Mobile Phone, Tablet Apps | 4.1% | 3.7% | 10.1% | 7.3% | 5.3% | 8.5% |
| Friends,Family | 57.5% | 61.7% | 55.6% | 67.5% | 55.8% | 55.5% |
| Travel Agent | 25.0% | 35.8% | 64.3% | 27.0% | 44.1% | 52.7% |
| Estimating the costs of your trip | | | | | | |
| Internet | 53.6% | 56.0% | 22.9% | 61.5% | 53.1% | 53.3% |
| Guide Books | 4.1% | 7.3% | 2.0% | 6.7% | 6.6% | 3.9% |
| Mobile Phone, Tablet Apps | 3.4% | 4.7% | 3.8% | 2.6% | 3.3% | 3.6% |
| Friends,Family | 13.5% | 19.0% | 16.5% | 17.5% | 14.8% | 10.6% |
| Travel Agent | 23.2% | 35.0% | 69.1% | 23.0% | 39.1% | 47.9% |
| Finding places to shop | | | | | | |
| Internet | 31.9% | 38.9% | 52.4% | 44.3% | 45.5% | 47.2% |
| Guide Books | 36.5% | 39.6% | 75.1% | 44.7% | 42.9% | 51.4% |
| Mobile Phone, Tablet Apps | 26.8% | 22.6% | 49.3% | 21.3% | 28.7% | 28.0% |
| Friends,Family | 37.1% | 41.8% | 42.1% | 41.7% | 31.5% | 52.2% |
| Travel Agent | 9.8% | 9.3% | 11.6% | 8.3% | 4.5% | 7.3% |
| Finding restaurants | | | | | | |
| Internet | 48.1% | 53.7% | 55.6% | 53.6% | 53.9% | 49.6% |
| Guide Books | 61.0% | 60.7% | 66.2% | 58.6% | 54.9% | 49.2% |
| Mobile Phone, Tablet Apps | 46.4% | 40.4% | 44.5% | 31.3% | 43.1% | 32.9% |
| Friends,Family | 58.3% | 59.0% | 46.6% | 53.1% | 48.1% | 46.2% |
| Travel Agent | 9.7% | 14.8% | 16.7% | 11.3% | 5.7% | 5.4% |

Figure 35: How Sources of Information Were Used by MMA, 2014 (Continued)
(Percentage of visitors by MMA)

| | Major Market Areas | | | | | |
|---|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Making airline reservations | | | | | | |
| Internet | 83.9% | 74.8% | 31.1% | 79.5% | 55.9% | 37.6% |
| Guide Books | 0.6% | 0.1% | 0.2% | 0.6% | 0.4% | 0.6% |
| Mobile Phone, Tablet Apps | 4.1% | 4.6% | 3.9% | 4.3% | 3.6% | 1.5% |
| Friends,Family | 13.9% | 13.3% | 13.1% | 8.9% | 9.3% | 4.7% |
| Travel Agent | 45.0% | 57.6% | 79.9% | 56.4% | 77.0% | 86.7% |
| Making car rental reservations | | | | | | |
| Internet | 67.3% | 59.1% | 18.6% | 69.1% | 49.8% | 26.7% |
| Guide Books | 0.8% | 0.7% | 1.8% | 2.4% | 1.2% | 3.5% |
| Mobile Phone, Tablet Apps | 4.9% | 4.7% | 3.2% | 6.2% | 4.8% | 6.4% |
| Friends,Family | 12.5% | 12.4% | 8.7% | 13.1% | 14.5% | 6.3% |
| Travel Agent | 44.1% | 38.4% | 9.1% | 22.8% | 35.7% | 13.0% |
| Making hotel or other lodging reservations | | | | | | |
| Internet | 64.5% | 61.9% | 30.7% | 71.6% | 60.1% | 55.8% |
| Guide Books | 2.7% | 3.7% | 1.7% | 4.5% | 4.7% | 4.2% |
| Mobile Phone, Tablet Apps | 4.1% | 4.8% | 3.7% | 5.8% | 6.6% | 3.9% |
| Friends,Family | 27.4% | 25.8% | 18.8% | 28.2% | 18.7% | 13.3% |
| Travel Agent | 46.4% | 53.5% | 75.8% | 39.1% | 61.8% | 64.1% |
| Planning activities | | | | | | |
| Internet | 55.8% | 61.0% | 41.2% | 63.5% | 64.1% | 57.2% |
| Guide Books | 63.1% | 60.6% | 30.3% | 63.2% | 70.8% | 39.8% |
| Mobile Phone, Tablet Apps | 15.7% | 15.0% | 16.3% | 19.7% | 20.5% | 14.4% |
| Friends,Family | 58.5% | 64.1% | 34.2% | 58.7% | 62.9% | 47.2% |
| Travel Agent | 22.8% | 29.7% | 35.1% | 20.0% | 17.7% | 22.6% |
| Purchasing any tour or attraction packages | | | | | | |
| Internet | 30.8% | 39.9% | 31.1% | 37.2% | 39.6% | 35.6% |
| Guide Books | 23.6% | 21.5% | 14.5% | 24.4% | 19.8% | 25.4% |
| Mobile Phone, Tablet Apps | 7.2% | 6.8% | 9.9% | 9.1% | 8.0% | 9.0% |
| Friends,Family | 15.4% | 19.8% | 15.9% | 16.6% | 13.0% | 14.6% |
| Travel Agent | 41.4% | 39.5% | 46.2% | 37.8% | 30.3% | 26.7% |
| Other trip planning | | | | | | |
| Internet | 1.1% | 1.0% | 1.9% | 0.6% | 1.0% | 1.4% |
| Guide Books | 0.1% | 0.7% | 1.4% | 0.7% | 0.7% | 0.3% |
| Mobile Phone, Tablet Apps | 0.7% | 0.2% | 1.8% | 0.4% | 1.3% | 0.5% |
| Friends,Family | 0.7% | 0.6% | 1.2% | 0.4% | 0.7% | 0.6% |
| Travel Agent | 1.1% | 0.9% | 1.4% | 0.7% | 0.1% | 0.5% |

Across all markets, the majority of visitors used smartphones and tablets to access maps and directions and check the weather. Some used smartphones and tablets to find restaurants, find places to shop and for airport check-in. Visitors relied on guidebooks primarily for maps and directions, planning activities, and finding places to shop or dine. Recommendations from friends and family were important to many visitors when selecting their destination and planning their activities.

Visitors from Japan used travel agents more often than other resources for certain aspects of their trip planning. These include choosing an airline, deciding on a destination, estimating cost of trip, airline and lodging reservations and purchasing tour packages.

SAFETY ISSUES AND OTHER NUISANCES

The safety of visitors is very important to the State of Hawai'i and industry partners. The VSAT Survey asked visitors if they had experienced any adversity or safety issues while in Hawai'i.

**Figure 36: 2014 Issues and Other Nuisance
(Percentage of Visitors by MMA)**

| | Major Market Areas | | | | | |
|-----------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| no problems | 48.5% | 43.3% | 44.9% | 47.4% | 52.7% | 38.2% |
| seeing homeless | 42.1% | 52.0% | 48.0% | 46.5% | 46.5% | 63.0% |
| severe weather/natural calamities | 12.9% | 11.4% | 8.2% | 12.6% | 13.3% | 6.7% |
| other negative | 10.2% | 9.2% | 6.7% | 7.9% | 5.4% | 8.4% |
| service problems | 3.2% | 2.4% | 6.7% | 3.6% | 1.8% | 3.0% |
| verbal harassment | 2.3% | 1.5% | 1.4% | 2.4% | 1.5% | 2.5% |
| parking ticket | 1.6% | 1.2% | 3.0% | 2.4% | 0.8% | 0.8% |
| drug dealers | 1.3% | 1.6% | 0.7% | 2.1% | 2.2% | 1.9% |
| wallet stolen | 0.8% | 1.0% | 1.6% | 1.9% | 0.8% | 1.2% |
| solicited by prostitutes | 0.7% | 1.0% | 0.4% | 1.0% | 1.2% | 1.3% |
| car vandalized | 0.7% | 0.5% | 0.4% | 0.5% | 0.9% | 0.0% |
| violence | 0.3% | 0.2% | 0.3% | 0.8% | 0.1% | 0.2% |
| room vandalized | 0.3% | 0.2% | 0.2% | 0.3% | 0.0% | 0.3% |

- In 2014, half of the respondents from U.S. West, Canada and Europe and four out of ten respondents from U.S. East, Japan and Oceania had no problems while in Hawai'i.
- Among visitors who reported issues or nuisance during their stay, the most mentioned was seeing homeless people.
- The second most common issue reported was severe weather/natural calamities.
- Compared to visitors from other markets, Japanese visitors reported more issues with the level of service they received during their trip (6.7%).
- Across all visitor markets, less than 5 percent reported experiencing verbal harassment, getting a parking ticket, being approached by drug dealers, or having their wallet stolen.

VISITOR PROFILES

This section of the report includes a profile of 2014 Hawai'i visitors who participated in the VSAT survey.

Figure 37: Lifestyle/Lifestage Segments and Visitation Status by MMA, 2014¹⁶

| | Major Market Areas | | | | | |
|----------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| LIFESTYLE/LIFESTAGE | | | | | | |
| Wedding / Honeymoon | 3.9% | 7.1% | 13.2% | 3.0% | 10.6% | 4.1% |
| Family | 27.0% | 19.1% | 15.4% | 25.3% | 7.9% | 19.7% |
| Young | 10.1% | 10.1% | 12.3% | 11.9% | 25.0% | 12.2% |
| Middle Age | 22.6% | 23.2% | 23.1% | 23.9% | 33.3% | 22.2% |
| Seniors | 36.4% | 40.5% | 36.0% | 35.9% | 23.2% | 41.7% |
| VISITATION STATUS | | | | | | |
| First time | 18.8% | 41.2% | 41.5% | 34.5% | 69.0% | 54.9% |
| Repeat | 81.2% | 58.8% | 58.5% | 65.5% | 31.0% | 45.1% |

U.S. West and U.S. East

- Seniors represented the largest segment among both U.S. West (36.4%) and U.S. East (40.5%) respondents in 2014. Family (27%) accounted for the second largest segment of U.S. West respondents, while Middle Age (23.2%) was the second largest segment for the U.S. East market.
- The majority of U.S. West visitors (81.2%) and 58.8 percent of U.S. East visitors have been to Hawai'i before.

Japan

- In 2014, more than half of Japanese respondents were in the Senior (36%) and Middle Age (23.1%) segments.
- Family comprised 15.4 percent, while Wedding/Honeymoon accounted for 13.2 percent of visitors from Japan.
- Three out of five Japanese respondents (58.5%) were Repeat Visitors.

Canada

- Among Canadian respondents in 2014, Senior (35.9%) accounted for a larger percentage than Family (25.3%) and Middle Age (23.9%) visitors.
- There were almost twice as many Repeat visitors (65.5%) compared to First-Time visitors (34.5%).

¹⁶ Total may not sum to 100% due to rounding.

Europe

- One-third of European respondents in 2014 were Middle Age and 25 percent were Young. Seniors accounted for 23.2 percent of European visitors.
- Wedding/Honeymoon made up 10.6 percent of European respondents while 7.9 percent were in the Family segment.
- The majority of European respondents (69%) were First-Time visitors.

Oceania

- Seniors (41.7%) comprised the largest group of respondents from Oceania, followed by Middle Age (22.2%) and Family (19.7%).
- More than half of Oceania respondents (54.9%) were First-Time visitors.

Figure 38: Employment, Income, and Education by MMA, 2014¹⁷

| | Major Market Areas | | | | | |
|----------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| EMPLOYMENT | | | | | | |
| Self-employed | 18.7% | 14.6% | 12.3% | 18.3% | 15.2% | 15.5% |
| Employed, for someone else | 52.3% | 55.9% | 40.7% | 50.9% | 64.4% | 59.9% |
| Retired | 22.3% | 23.7% | 11.7% | 25.6% | 11.0% | 20.2% |
| Student | 1.5% | 1.6% | 9.7% | 1.8% | 5.7% | 1.0% |
| Homemaker | 3.9% | 3.2% | 18.1% | 2.4% | 0.6% | 2.3% |
| Other | 1.3% | 1.0% | 7.5% | 1.0% | 3.1% | 1.1% |
| INCOME | | | | | | |
| Up to \$49,999 | 10.4% | 9.1% | 28.0% | 11.1% | 25.0% | 11.9% |
| \$50K-\$69,999 | 9.2% | 10.1% | 20.9% | 12.7% | 14.5% | 15.2% |
| \$70K-\$99,999 | 19.8% | 19.8% | 27.6% | 20.2% | 20.4% | 20.2% |
| \$100K-\$199,999 | 38.8% | 38.2% | 23.2% | 39.2% | 30.4% | 38.2% |
| \$200K+ | 21.9% | 22.8% | 0.3% | 16.7% | 9.8% | 14.4% |
| EDUCATION | | | | | | |
| No, some high school | 0.5% | 0.5% | 1.4% | 1.6% | 5.5% | 3.8% |
| High school grad | 4.1% | 7.4% | 26.9% | 10.3% | 11.8% | 25.4% |
| Some college | 15.2% | 11.5% | 5.8% | 12.6% | 9.9% | 8.2% |
| Vocational/technical | 3.4% | 2.7% | 9.7% | 10.1% | 9.5% | 12.3% |
| 2-year degree | 8.1% | 7.2% | 10.0% | 6.4% | 4.3% | 5.6% |
| 4-year degree | 36.9% | 35.3% | 41.4% | 31.9% | 29.6% | 22.6% |
| Post grad degree | 31.7% | 35.5% | 4.8% | 27.1% | 29.4% | 22.2% |

¹⁷ Total may not sum to 100% due to rounding.

U.S. West

- In 2014, 71 percent of U.S. West respondents were employed while 22.3 percent were retirees.
- Nearly 60 percent of U.S. West respondents reported annual household incomes of over \$100,000.
- Four out of ten respondents were college graduates (36.9%), 31.7 percent had post graduate degrees, and 4.1 percent were high school graduates.

U.S. East

- Similar to U.S. West visitors, the majority of U.S. East respondents were employed (70.5%) or retired (23.7%).
- In 2014, 61 percent of U.S. East respondents reported having annual household incomes of \$100,000 or more.
- A similar percentage of respondents had either a college degree (35.3%) or a post-graduate degree (35.5%).

Japan

- In 2014, 53 percent of respondents from Japan were employed. Similar to previous years, there were significantly more homemakers (18.1%) compared to the U.S. West, U.S. East, Canadian, European and Oceania markets.
- Among Japanese respondents who visited Hawai'i, 23.5 percent reported annual household incomes of 10.6 million yen or more.
- Four out of ten Japanese visitors had a college degree. The percentage of respondents with post-graduate degrees (4.8%) was significantly lower compared to other visitor markets.

Canada

- Similar to U.S. visitors, 69.2 percent of Canadian respondents in 2014 were employed and 25.6 percent were retirees.
- Four out of ten Canadian respondents reported income levels between \$100,000 and \$199,999 while 16.7 percent reported annual household income of \$200,000 or more.
- One of three respondents had earned a college degree, 27.1 percent had postgraduate degrees and 10.3 percent were high school graduates.

Europe

- The majority of European respondents 2014 were employed (79.6%), while 11 percent were retired.
- Four out of ten European respondents reported income levels of \$100,000 or more.
- Three out of ten European respondents had a post-graduate degree, and another 29.6 percent had earned a college degree.

Oceania

- Three out of four respondents from Oceania were employed while 20.2 percent were retired.
- Half of Oceania respondents had annual household incomes of \$100,000 or more.

- A quarter of the Oceania respondents were high school graduates, 22.6 percent were college graduates and 22.2 earned post-graduate degree.

Other Visitor Characteristics

Visitors were also asked about their traveling companions, travel history, if they had ever been a resident of Hawai'i, had friends or relatives living in the State, whether they own property in Hawai'i and the type of accommodations they stayed in.

Figure 39: Visitor Characteristics by MMA, 2014¹⁸

| | Major Market Areas | | | | | |
|--|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Gender | | | | | | |
| Male | 47.9% | 51.6% | 48.9% | 47.0% | 60.3% | 44.9% |
| Female | 52.1% | 48.4% | 51.1% | 53.0% | 39.7% | 55.1% |
| Age (Median Years) | 53 | 54 | 49 | 52 | 43 | 53 |
| Traveled 500+ miles in past 3 years | | | | | | |
| Yes | 85.6% | 81.8% | 64.9% | 89.7% | 88.5% | 85.5% |
| No | 14.4% | 18.2% | 35.1% | 10.3% | 11.5% | 14.5% |
| Lived in Hawaii | | | | | | |
| yes | 10.9% | 6.0% | 1.4% | 2.1% | 1.9% | 1.2% |
| no | 89.1% | 94.0% | 98.6% | 97.9% | 98.1% | 98.8% |
| Friends/Relatives in Hawaii | | | | | | |
| yes | 50.4% | 39.4% | 15.4% | 18.3% | 20.2% | 8.2% |
| no | 49.6% | 60.6% | 84.6% | 81.7% | 79.8% | 91.8% |
| Own Property in Hawaii | | | | | | |
| Yes, I own timeshare units | 8.9% | 5.4% | 9.1% | 5.4% | 0.5% | 0.6% |
| Yes, I own other types of property | 3.8% | 1.8% | 0.6% | 2.2% | 1.1% | 0.2% |
| No, but plan to in the future | 11.0% | 7.5% | 10.5% | 7.9% | 3.9% | 2.9% |
| No | 76.3% | 85.2% | 79.8% | 84.5% | 94.5% | 96.4% |
| Traveled to Hawaii with... | | | | | | |
| My spouse | 70.9% | 72.1% | 67.8% | 70.4% | 52.6% | 71.9% |
| My kids | 28.5% | 19.7% | 16.8% | 24.4% | 8.6% | 20.1% |
| My adult family members | 31.1% | 28.9% | 33.5% | 30.6% | 19.2% | 21.8% |
| My friends/associates | 18.5% | 17.6% | 16.3% | 20.7% | 22.1% | 21.0% |
| My girl/boy friend | 7.1% | 4.8% | 2.0% | 7.5% | 18.9% | 6.2% |
| Same sex partner | 2.1% | 2.0% | 0.3% | 1.3% | 2.1% | 2.0% |

¹⁸ Total for "Traveled to Hawai'i with..." sums to more than 100% due to multiple response.

**Figure 40: Places Visited in the Past Three Years
(Percentage of Visitors by MMA, 2014)**

| | Major Market Areas | | | | | |
|-----------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Traveled to... | | | | | | |
| Alaska | 12.1% | 9.7% | 0.9% | 5.9% | 3.3% | 9.2% |
| Australia | 4.5% | 4.5% | 6.1% | 7.0% | 15.8% | 50.1% |
| Bali | 0.8% | 0.7% | 7.0% | 2.4% | 5.5% | 16.6% |
| California | 46.4% | 40.9% | 2.4% | 34.4% | 39.1% | 47.1% |
| Canada | 17.8% | 16.3% | 4.6% | 45.0% | 17.9% | 23.6% |
| Caribbean | 13.7% | 27.1% | 0.4% | 24.2% | 17.1% | 5.9% |
| Central America | 4.8% | 5.0% | 0.8% | 6.4% | 5.1% | 3.3% |
| China | 5.1% | 3.2% | 13.0% | 5.4% | 9.5% | 6.8% |
| Europe | 27.8% | 30.1% | 22.8% | 33.4% | 72.2% | 36.1% |
| Fiji | 1.0% | 0.3% | 0.4% | 1.3% | 1.3% | 11.9% |
| Florida | 22.9% | 45.1% | 5.2% | 23.9% | 22.6% | 11.9% |
| Guam/Saipan | 0.5% | 0.4% | 16.9% | 0.2% | 0.3% | 0.6% |
| Japan | 5.2% | 2.8% | 46.4% | 3.1% | 6.7% | 6.7% |
| Korea | 1.8% | 1.1% | 24.4% | 1.6% | 1.8% | 2.2% |
| Las Vegas | 37.7% | 28.5% | 4.6% | 31.4% | 29.8% | 43.0% |
| Mexico | 20.9% | 17.0% | 1.4% | 27.9% | 11.1% | 6.4% |
| New York City | 19.9% | 25.2% | 6.3% | 18.1% | 31.7% | 36.7% |
| New Zealand | 2.6% | 2.3% | 1.4% | 3.1% | 5.9% | 24.7% |
| Other Asia | 5.0% | 3.9% | 22.0% | 4.9% | 16.6% | 14.0% |
| Other US States | 54.2% | 52.1% | 13.5% | 42.8% | 36.0% | 38.0% |
| South America | 5.3% | 5.7% | 1.5% | 5.6% | 10.3% | 4.1% |
| Thailand | 3.0% | 2.1% | 10.3% | 3.2% | 16.2% | 18.5% |
| Other | 17.1% | 17.1% | 15.8% | 16.2% | 22.8% | 18.1% |
| None | 1.2% | 0.9% | 1.4% | 0.3% | 0.1% | 0.4% |

U.S. West

- There were more females (52.1%) than males (47.9%) among U.S. West visitors in 2014. The median age of U.S. West respondents was 53 years old.
- Most of the U.S. West respondents (85.6%) had traveled on vacation more than 500 miles from home in the past three years. Nearly half of the respondents visited California (46.4%), 37.7 percent visited Las Vegas, and 27.8 percent had been to Europe in the last three years. About 20 percent of U.S. West visitors had traveled recently to Florida (22.9%), Mexico (20.9%) and New York City (19.9%).
- Half of these respondents had friends or relatives in Hawai'i and 10.9 percent were previous Hawai'i residents. They were the most likely visitor segment to own property in Hawai'i (12.7%).
- The majority of U.S. West respondents traveled to the islands with their spouses (70.9%), 31.1 percent came with other adult family members, and 28.5 percent came with children. Additionally, 18.5 percent of U.S. West visitors came with friends/business associates.

- While on O‘ahu, U.S. West visitors in 2014 stayed primarily in hotels (58.1%), as opposed to other types of accommodation. A similar proportion of U.S. West visitors stayed in hotels (35.9%) and in condominium units (34.8%) while on Maui. While visiting Hilo, these visitors stayed in hotels (34.7%) and at the homes of family or friends (25.8%). While on Kaua‘i, a similar proportion of U.S. West visitors stayed in hotels (29.1%) and in timeshare properties (28.6%).

U.S. East

- Just over half of the U.S. East visitors who responded to the 2014 survey were male (51.6%). The median age of U.S. East respondents was 54 years.
- The majority (81.8%) of the U. S. East respondents had taken a long distance trip of more than 500 miles from their homes in the past three years. Destinations that they have visited included Florida (45.1%), California (40.9%), Europe (30.1%), Las Vegas (28.5%) and the Caribbean (27.1%).
- Compared to their U.S. West counterparts, fewer U.S. East visitors previously lived in Hawai‘i (6%), have friends and relatives who live in Hawai‘i (39.4%) or own property in Hawai‘i (7.2%).
- In 2014, the majority of U.S. East respondents came to Hawai‘i with their spouses (72.1%). Some came with other adult family members (28.9%), with children (19.7%) and with friends/business associates (17.6%).
- In 2014, U.S. East respondents who went to O‘ahu stayed primarily in hotels (65.5%) while 17.1 percent stayed with friends and family. While on Maui the top two choices for lodging were hotels (44.7%) and condominiums (22.8%). On Kaua‘i, 36.6 percent of U.S. East respondents stayed in hotels while 21 percent were in timeshares. On Hawai‘i Island, 45.2 percent of these visitors stayed in hotels while usage of condominiums and timeshare properties were tied at 13.4 percent.

Japan

- More females than males responded to the survey in 2014 (51.1% and 48.9%, respectively). The median age for Japanese respondents was 49 years old.
- Compared to visitors from other MMAs, Japanese visitors were less likely to have taken a long distance trip of more than 500 miles from their homes in the past three years (64.9%). Those who had traveled during the past several years have gone to different parts of Japan (46.4%), to Korea (24.4%), Europe (22.8%), China (13%), and either Guam or Saipan (16.9%).
- Very few Japanese respondents lived in Hawai‘i previously (1.4%), but 15.4 percent have friends and/or relatives living in Hawai‘i in 2014.
- A higher percentage of Japanese respondents owned timeshare properties (9.1%) in Hawai‘i compared to respondents from other markets.
- Two out of three (67.8%) Japanese visitors surveyed in 2014 came with their spouses, while 33.5 percent came to Hawai‘i with adult members of their families. Close to 17 percent traveled with their children and 16.3 percent came with friends/associates.
- In 2014, hotels were the lodging of choice for Japanese visitors on O‘ahu (83.4%), Hawai‘i Island (75.9%) and Maui (52%). While on Kaua‘i, 42 percent stayed in a hotel, 38.9 percent stayed on a cruise ship and 10.4 percent used condominium properties.

Figure 41: Accommodations by MMA, 2014
(Percentage of Visitors by MMA)

| | Major Market Areas | | | | | |
|-------------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Accommodation- Oahu | | | | | | |
| Hotel | 58.1% | 65.5% | 83.4% | 61.3% | 82.6% | 91.4% |
| Condo | 6.9% | 5.9% | 9.3% | 16.9% | 4.9% | 4.2% |
| Bed & Breakfast | 0.5% | 0.2% | 0.1% | 0.7% | 3.9% | 1.2% |
| Timeshare | 8.6% | 7.0% | 6.6% | 8.7% | 1.0% | 1.3% |
| Friends' or Family's Home | 20.5% | 17.1% | 0.9% | 4.4% | 4.7% | 1.3% |
| Home I Own | 1.0% | 0.2% | 0.3% | 0.4% | 1.4% | 0.0% |
| Cruise Ship | 0.4% | 2.2% | 0.2% | 1.8% | 1.0% | 0.7% |
| Vacation Rental Property | 10.3% | 6.4% | 0.8% | 12.5% | 6.0% | 2.4% |
| Other | 1.6% | 2.0% | 0.9% | 2.1% | 2.4% | 0.7% |
| Accommodation- Maui Island | | | | | | |
| Hotel | 35.9% | 44.7% | 52.0% | 28.0% | 58.5% | 52.6% |
| Condo | 34.8% | 22.8% | 23.5% | 44.5% | 17.2% | 11.1% |
| Bed & Breakfast | 1.4% | 1.3% | 1.2% | 2.0% | 8.3% | 1.1% |
| Timeshare | 20.1% | 11.9% | 4.6% | 8.2% | 1.4% | 2.8% |
| Friends' or Family's Home | 7.2% | 4.2% | 1.6% | 3.1% | 3.8% | 1.5% |
| Home I Own | 0.8% | 0.8% | 0.5% | 1.1% | 0.2% | 0.0% |
| Cruise Ship | 1.2% | 11.2% | 16.5% | 5.4% | 4.8% | 27.3% |
| Vacation Rental Property | 9.6% | 8.1% | 0.6% | 17.7% | 8.7% | 3.4% |
| Other | 1.1% | 0.7% | 0.6% | 2.2% | 3.3% | 1.6% |
| Accommodation- Hilo | | | | | | |
| Hotel | 34.7% | 27.6% | 64.3% | 29.0% | 45.2% | 21.9% |
| Condo | 4.5% | 2.6% | 0.0% | 5.5% | 3.9% | 1.3% |
| Bed & Breakfast | 7.9% | 7.7% | 1.0% | 12.9% | 21.0% | 7.1% |
| Timeshare | 2.9% | 1.1% | 2.2% | 2.9% | 0.1% | 0.1% |
| Friends' or Family's Home | 25.8% | 9.2% | 0.0% | 1.6% | 3.0% | 0.8% |
| Home I Own | 1.9% | 1.0% | 0.0% | 0.1% | 0.0% | 0.0% |
| Cruise Ship | 8.3% | 43.0% | 29.6% | 28.4% | 9.8% | 62.9% |
| Vacation Rental Property | 17.9% | 11.1% | 1.8% | 21.6% | 11.4% | 4.0% |
| Other | 6.8% | 3.4% | 1.1% | 9.6% | 12.0% | 3.2% |
| Accommodation- Kona | | | | | | |
| Hotel | 37.0% | 40.3% | 73.0% | 30.7% | 61.6% | 37.8% |
| Condo | 22.9% | 14.2% | 8.1% | 24.9% | 8.9% | 8.8% |
| Bed & Breakfast | 1.2% | 2.1% | 0.2% | 2.0% | 13.7% | 3.0% |
| Timeshare | 14.6% | 14.2% | 9.1% | 12.8% | 1.3% | 2.1% |
| Friends' or Family's Home | 13.2% | 4.7% | 0.8% | 4.4% | 4.7% | 1.1% |
| Home I Own | 1.7% | 0.9% | 0.0% | 1.9% | 0.5% | 0.1% |
| Cruise Ship | 2.2% | 19.9% | 7.0% | 8.6% | 6.0% | 39.4% |
| Vacation Rental Property | 15.5% | 10.3% | 1.9% | 23.4% | 7.5% | 7.1% |
| Other | 1.8% | 1.2% | 0.7% | 2.6% | 3.6% | 3.0% |
| Accommodation- Hawaii Island | | | | | | |
| Hotel | 40.9% | 45.2% | 75.9% | 35.1% | 66.6% | 43.4% |
| Condo | 22.1% | 13.4% | 7.3% | 24.2% | 8.4% | 8.2% |
| Bed & Breakfast | 1.2% | 2.0% | 0.2% | 2.0% | 12.9% | 2.8% |
| Timeshare | 14.1% | 13.4% | 8.2% | 12.4% | 1.2% | 1.9% |
| Friends' or Family's Home | 12.7% | 4.4% | 0.7% | 4.2% | 4.4% | 1.0% |
| Home I Own | 1.7% | 0.8% | 0.0% | 1.8% | 0.5% | 0.1% |
| Cruise Ship | 2.1% | 18.7% | 6.3% | 8.4% | 5.6% | 36.7% |
| Vacation Rental Property | 14.9% | 9.7% | 1.7% | 22.8% | 7.1% | 6.6% |
| Other | 1.7% | 1.1% | 0.6% | 2.5% | 3.4% | 2.8% |
| Accommodation- Kauai | | | | | | |
| Hotel | 29.1% | 36.6% | 42.0% | 24.6% | 57.5% | 29.5% |
| Condo | 22.3% | 14.3% | 10.4% | 26.5% | 12.8% | 7.4% |
| Bed & Breakfast | 0.3% | 1.7% | 0.0% | 1.6% | 8.7% | 3.2% |
| Timeshare | 28.6% | 21.0% | 2.7% | 19.2% | 1.9% | 4.8% |
| Friends' or Family's Home | 6.5% | 3.4% | 0.0% | 2.2% | 3.1% | 1.3% |
| Home I Own | 1.5% | 0.3% | 0.0% | 0.3% | 0.0% | 0.0% |
| Cruise Ship | 1.6% | 17.3% | 38.9% | 10.8% | 6.3% | 48.1% |
| Vacation Rental Property | 20.4% | 10.6% | 5.9% | 24.0% | 12.3% | 8.2% |
| Other | 1.3% | 1.2% | 0.0% | 2.2% | 5.0% | 0.8% |

Canada

- There were more females (53%) than males (47%) among Canadian visitors surveyed in 2014. The median age among Canadian respondents was 52 years old.
- Nine out of ten respondents (89.7%) had taken a long distance trip of more than 500 miles from their homes in the past three years. Destinations visited include traveling within Canada (45%), California (34.4%), Europe (33.4%), Las Vegas (31.4%), Mexico (27.9%), Caribbean (24.2%) and Florida (23.9%).
- Only 2.1 percent had lived in Hawai'i before, but 18.3 percent have friends and/or relatives who live in the islands. Some own timeshare units (5.4%) or other types of property (2.2%) in Hawai'i.
- Slightly over 70 percent of the Canadian respondents came with their spouses, 30.6 percent came to Hawai'i with adult members of their families, 24.4 percent traveled with their children and 20.7 percent came with friends/associates.
- Most Canadians stayed in hotels (61.3%) while they were on O'ahu. Condominium properties were the most popular choice (44.5%) during their time on Maui. On Kaua'i, a similar percentage of Canadians opted for condominiums (26.5%), hotels (24.6%) and vacation rental properties (24%).

Europe

- In 2014, the majority (60.3%) of the European visitors surveyed were male. The median age among European respondents was 43 years old.
- Most visitors from Europe (88.5%) had taken a long distance trip of more than 500 miles from their homes in the past three years. Many of these respondents traveled to other parts of Europe (72.2%), California (39.1%), New York (31.7%) and Las Vegas (29.8%) in the past three years.
- Only 1.9 percent of Europeans lived in Hawai'i in the past, but 20.2 percent have friends and relatives living in Hawai'i.
- Half of the European respondents in 2014 came with their spouses, 22.1 traveled with friends or associates, 19.2 percent came with other adult family members, and 18.9 percent came with boyfriend or girlfriend.
- European visitors preferred to stay in hotels, regardless of which island they visited.

Oceania

- Among the survey respondents from Oceania, 55.1 percent were female and 44.9 percent were male. The median age was 53 years old.
- Nearly 86 percent of these respondents had taken a long distance trip of more than 500 miles from their homes in the past three years. Half of 2014 respondents had traveled around Australia (50.1%). Other popular destinations for Oceania visitors included California (47.1%), Las Vegas (43%), New York (36.7%) and Europe (36.1%).
- Only 1.2 percent of Oceania respondents have lived in Hawai'i before and only 8.2 percent have friends and relatives who reside in the State.

- Seven out of ten Oceania visitors surveyed came with their spouses (71.9%). A similar percentage traveled with their kids (20.1%), with adult family members (21.8%) or with friends or business associates (21%).
- Most Oceania respondents stayed in hotels (91.4%) while on O‘ahu, while 52.6 percent of the respondents stayed in hotels while on Maui. While visiting Hilo, 62.9 percent stayed on cruise ships.

Primary Purpose of Trip

The VSAT survey inquired about visitors’ primary purpose of trip while in Hawai‘i and respondents could only select one reason from the list shown in Table 21.

**Figure 42: Primary Purpose of Trip All Visitors, 2014
(Percentage of Visitors by MMA)**

| Purpose of Trip | Major Market Areas | | | | | |
|-----------------------------------|--------------------|---------|-------|--------|--------|---------|
| | US-West | US-East | Japan | Canada | Europe | Oceania |
| Vacation | 64.4% | 58.5% | 64.1% | 80.1% | 69.4% | 85.0% |
| Visit friends/relatives | 9.6% | 11.4% | 1.5% | 2.6% | 5.8% | 1.2% |
| Attend/participate in wedding | 3.7% | 2.5% | 10.9% | 2.8% | 1.2% | 1.8% |
| Business meeting/conduct business | 6.2% | 6.7% | 1.0% | 1.9% | 3.1% | 0.6% |
| Honeymoon | 1.9% | 4.5% | 9.4% | 1.5% | 7.1% | 3.1% |
| Anniversary/birthday | 3.4% | 5.5% | 1.7% | 3.0% | 2.7% | 2.2% |
| Convention, conference, seminar | 1.7% | 3.6% | 0.7% | 1.8% | 4.1% | 0.6% |
| Family gathering/Reunion | 2.6% | 1.4% | 1.1% | 1.6% | 0.4% | 0.7% |
| Sports event | 1.1% | 0.5% | 2.0% | 1.2% | 1.0% | 0.8% |
| Get married | 0.6% | 0.5% | 2.5% | 0.6% | 0.7% | 0.4% |
| Incentive/reward | 0.6% | 1.6% | 1.0% | 1.0% | 1.0% | 0.2% |
| Shopping/fashion | 0.1% | 0.1% | 1.5% | 0.1% | 0.4% | 0.6% |
| Other | 4.2% | 3.3% | 2.4% | 1.8% | 2.9% | 2.8% |

- Vacation continued to be the primary purpose of trip by the majority of visitors to Hawai‘i. Visiting friends and relatives and Honeymoon were the next most frequently cited reasons.
- A higher percentage of U.S. East and U.S. West visitors came because of Family (visit family/friends, family gathering/reunion) compared to other visitor markets.
- Among Japanese respondents, Attend/participate in wedding (10.9%) and to Honeymoon (9.4%) were the next most popular reasons for coming to the islands.

SURVEY METHODOLOGY

The Visitor Satisfaction and Activity Survey was designed to measure visitor satisfaction with the State of Hawai'i as a vacation destination and to obtain information on visitor activities and trip planning behaviors.

Two versions of the VSAT survey instrument were used: one in English and the other in Japanese. Both survey instruments had exactly the same content. The 2014 survey has six pages and 28 questions. Copies of these two surveys instruments are presented in the appendix to this report.

The U.S. samples were drawn from the list of completed Domestic In-Flight Survey forms. Samples of Japanese, Canadian, European, and Oceania visitors were drawn from the list of completed International Departure Survey forms and from completed Domestic In-Flight Survey forms. These two sample lists were purged of forms with missing, incomplete, or unreadable addresses. The resulting confirmed address files became the sampling frames for U.S. and international samples. Both frames were stratified by MMA, month, visitor status (First-Time vs. Repeat), and islands visited (O'ahu vs. Neighbor Islands). Samples were selected independently each month. The sample sizes for each MMA were calculated to produce roughly equal sampling errors based on results of surveys from previous years.

Survey forms were mailed to a sample of visitors from U.S. West, U.S. East, Japanese, Canada, Europe, and Oceania after they returned home from their trip to Hawai'i. Respondents completed forms and returned them in postage-paid envelopes supplied for that purpose. In 2014, English and Japanese-speaking respondents were also given the option of filling out the VSAT questionnaire online.

Figure 43: Response Rates and Sample Statistics, VSAT 2014

| MMA | Arrivals | | Mailed | | Returned | | Sample Fraction | Response Rate | Sample Error |
|-----------|-----------|--------|--------|--------|----------|--------|-----------------|---------------|--------------|
| | number | Pct. | number | Pct. | number | Pct. | | | |
| U.S. West | 3,286,677 | 43.41% | 15,017 | 22.18% | 3,942 | 21.18% | 0.12% | 26.25% | 1.37 |
| U.S. East | 1,734,794 | 22.91% | 11,783 | 17.40% | 3,398 | 18.26% | 0.20% | 28.84% | 1.52 |
| Canada | 524,565 | 6.93% | 12,459 | 18.40% | 3,401 | 18.27% | 0.65% | 27.30% | 1.49 |
| Japan | 1,511,699 | 19.96% | 11,056 | 16.33% | 3,331 | 17.90% | 0.22% | 30.13% | 1.56 |
| Europe | 143,057 | 1.89% | 7,728 | 11.41% | 2,118 | 11.38% | 1.48% | 27.41% | 1.89 |
| Oceania | 371,072 | 4.90% | 9,673 | 14.28% | 2,421 | 13.01% | 0.65% | 25.03% | 1.72 |
| Total | 7,571,864 | 100% | 67,716 | 100% | 18,611 | 100% | 0.25% | 27.48% | 0.64 |

The overall survey response rate for 2014 was 27.5 percent. That produced a sample error estimate of plus-or-minus 0.64 percentage points at the 95 percent confidence level. Response rates for individual MMAs ranged from a low of 25 percent points) for Oceania visitors to a high of 30.1 percent for Japanese visitors.

APPENDIX

ENGLISH LANGUAGE VSAT SURVEY FORM, 2014



Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
Website: www.hawaiitourismauthority.org

NEIL ABERCROMBIE
Governor

MIKE MCCARTNEY
President and
Chief Executive Officer

Telephone: (808) 973-2255
Fax: (808) 973-2253

«order»

Aloha!

We sincerely hope you enjoyed your recent trip to Hawai'i.

During your visit you were kind enough to complete the Hawai'i Tourism Authority visitor questionnaire. Your name was randomly selected from over a million completed forms to participate in this Visitor Satisfaction survey.

In Hawai'i, we do our best to ensure each visitor's stay is as enjoyable as possible. We would very much appreciate your candid answers to the enclosed questionnaire on how well we took care of you. Your responses will help us improve the Hawai'i experience for all visitors.

We assure you that your responses will be kept completely confidential and will be used for research purposes only. We will not release your name to any individual or organization for any reason. The answers you provide will be compiled without any identifying information and released only in aggregate form. It would be impossible to associate a response to an individual name or address.

We have contracted with SMS Research to conduct this survey on our behalf. Please return your completed questionnaire directly to them in the enclosed postage paid envelope. This survey is also available on the Internet. If you have Internet access, we recommend you fill out the survey on the web. The web address is:

www.hawaiitourismauthority.org/survey2014

The password to access the survey is the 6-digit number on the bottom right corner of the front page of the survey.

If you have any questions regarding this survey, please contact SMS Research toll free at (877) 535-5767, or by e-mail to Info@SMShawaii.com. We appreciate your visit to our islands and thank you very much for your time.

Sincerely,

Mike McCartney
President and Chief Executive Officer



HAWAII TOURISM AUTHORITY

2014 VISITOR SATISFACTION SURVEY

If you have internet access and a PC, we ask that you fill out this survey on the web at:
www.hawaii tourism authority.org/survey2014
 Your password is the 6 digit number on the label in the bottom right corner of this page.

Aloha! Please answer each question candidly, thinking of your most recent trip to Hawai'i. We need your feedback to evaluate how well we take care of those who visit our islands. Your answers will help us improve the Hawai'i experience for all visitors. Your responses will be kept completely confidential; answers from all respondents will be tallied as totals, not individual responses. Mahalo.

Instructions: Please answer each question by marking the circle [●] or writing in the space provided with a black pen or dark lead pencil. Return the completed survey in the postage-paid envelope as soon as possible.

| MARKING INSTRUCTIONS | |
|------------------------------------|--------------------------------------|
| CORRECT MARKS: ● ● ● ● ● | INCORRECT MARKS: ⊗ ⊘ ⊖ ⊙ ○ |

1. Overall, how would you rate your most recent trip to Hawai'i?

| Excellent | | | Above Average | Below Average | | | Poor |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2. Would you say this trip to Hawai'i ... ?

- Exceeded your expectations
- Met your expectations
- Did not meet your expectations

3. How likely are you to recommend Hawai'i as a vacation place to your friends and relatives?

- Very Likely
- Somewhat Likely
- Not too likely
- Not at all likely

4a. How likely are you to return to visit Hawai'i in the next five years?

- Very Likely ----- **SKIP TO Q5a**
- Somewhat Likely ----- **SKIP TO Q5a**
- Not too likely ----- **CONTINUE**
- Not at all likely ----- **CONTINUE**

4b. Why would you be unlikely to revisit Hawai'i? (Mark all that apply)

- Flight too long
- Too commercial/overdeveloped
- Too crowded/congested/traffic
- Not enough value for the price
- Want to go someplace new
- Other financial obligations
- Poor service
- Unfriendly people/felt unwelcome
- Poor health/age restriction
- Five years is too soon to revisit
- Too expensive
- Other (Specify) _____

- 5a. What was the primary purpose of your most recent trip to Hawai'i?
 5b. What, if any, was the secondary purpose of your most recent visit?

| | Q5a. Primary Purpose (one answer) | Q5b. Secondary Purpose(s) |
|---|---|------------------------------|
| Vacation | <input type="radio"/> | <input type="radio"/> |
| Attend a business meeting or conduct business | <input type="radio"/> | <input type="radio"/> |
| Attend a convention, conference or seminar | <input type="radio"/> | <input type="radio"/> |
| Incentive / reward | <input type="radio"/> | <input type="radio"/> |
| Visit friends or relatives | <input type="radio"/> | <input type="radio"/> |
| Get married | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a wedding | <input type="radio"/> | <input type="radio"/> |
| Honeymoon | <input type="radio"/> | <input type="radio"/> |
| Anniversary / birthday | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a cultural / historical / musical event | <input type="radio"/> | <input type="radio"/> |
| Attend / participate in a sporting event | <input type="radio"/> | <input type="radio"/> |
| Medical treatment | <input type="radio"/> | <input type="radio"/> |
| Shopping / fashion | <input type="radio"/> | <input type="radio"/> |
| Education / visit schools | <input type="radio"/> | <input type="radio"/> |
| Family Gathering / Reunion | <input type="radio"/> | <input type="radio"/> |
| Real estate purchase or viewing | <input type="radio"/> | <input type="radio"/> |
| Other (specify) _____ | <input type="radio"/> | <input type="radio"/> |

6. If you came to Hawai'i on vacation, would you describe your most recent trip to Hawai'i as: *[Select only one]*

- A once in a lifetime trip
- A special occasion
- More special than most trips we take
- A regular annual or semi-annual trip
- Other

7. On this trip, who was in your travel party?
[Mark all that apply]

- Myself
- My spouse
- My child(ren)/grandchild(ren) under 18
- Other adult members of my family
- My friends/associates
- My girlfriend/boyfriend
- Same sex partner

8. For each place you stayed overnight or longer, what type of accommodation did you stay in?

| | Friend's or Family's Home | | | | | | | | |
|------------------------------------|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------------|-----------------------|-----------------------|
| | Hotel | Condo | B&B | Time Share | Home I Own | Cruise Ship | Vacation Rental Property | Other | |
| Island of O'ahu (Waikiki/Honolulu) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Maui | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Moloka'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Lana'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Hilo) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Kona) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Kaua'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

9. For each place you visited on your most recent trip, which of the following did you see or do?

| | O'ahu | Maui | Kaua'i | Hawai'i Island (Hilo) | Hawai'i Island (Kona) | Moloka'i | Lana'i |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Sightseeing | | | | | | | |
| On own (self-guided) / Driving around island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Helicopter ride or airplane tour | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Boat Tour/submarine ride/whale watching | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Visiting communities - i.e. Chinatown, Haleiwa | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Private limousine/van tour/tour bus | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Scenic views / natural landmarks | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Movie and television filming location tours | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recreation | | | | | | | |
| Beach/sunbathing/swimming in the ocean | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Surfing/bodyboarding/paddleboarding | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Canoeing/kayaking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Snorkeling/scuba diving | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Jet skiing/parasailing/windsurfing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Golf | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Running/jogging/fitness walking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Spa | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Backpacking/hiking/camping | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Agritourism – i.e. farms, ranches | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Sports event or tournament | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| State parks / botanical gardens | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Entertainment and Dining | | | | | | | |
| Lunch/sunset/dinner/evening cruise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Live music / stage show | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Nightclub/dancing/bar/karaoke | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fine dining | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Family restaurant | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fast Food | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Café/coffee house | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ethnic dining | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Prepared own meals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Shopping | | | | | | | |
| Malls / department stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Designer boutiques | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hotel stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Swap meet or flea market | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Discount/outlet stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Supermarkets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Farmer's market | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Convenience stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Duty free stores | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Local shops and artisans | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| History, Culture, and Fine Arts | | | | | | | |
| Historic military site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other historic site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Museum/art gallery | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Luau | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Polynesian show/hula show | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Lessons such as hula or canoeing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ukulele lessons | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Play/concert/theatre | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Art/craft fair | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Festival (specify) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Business | | | | | | | |
| Meeting(s) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Convention / Conference | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

10. Regarding your most recent trip, how would you rate your experience for each place you visited ...

| | Excellent | Above Average | Below Average | Poor | Did not Visit |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Island of O'ahu (Waikiki/Honolulu) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Maui | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Moloka'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Lana'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Hilo) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| (Kona) Hawai'i Island | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Island of Kaua'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Thinking back on your most recent trip to Hawai'i, when did you make the following decisions?

11a. Mark if you made your decision during your trip.

11b. Mark if you made your decision before your trip.

If you made travel decisions during and before your trip, please fill in both circles.

11c. If 11b is marked, please estimate the number of months in advance that you made your decision.

Enter "0" if you made your decision less than one month before the trip began.

| | 11a. During Trip | 11b. Before Trip | 11c. # MONTHS |
|---|-----------------------|-----------------------|---------------|
| Decision to take vacation/pleasure trip | - | <input type="radio"/> | |
| Decision to visit Hawai'i | - | <input type="radio"/> | |
| Decision on which islands to visit | <input type="radio"/> | <input type="radio"/> | |
| Determining the dates of your trip | <input type="radio"/> | <input type="radio"/> | |
| Choosing a place to stay | <input type="radio"/> | <input type="radio"/> | |
| Making airline reservations | <input type="radio"/> | <input type="radio"/> | |
| Purchasing airline tickets | <input type="radio"/> | <input type="radio"/> | |
| Making accommodation reservations | <input type="radio"/> | <input type="radio"/> | |
| Making rental car reservations | <input type="radio"/> | <input type="radio"/> | |
| Purchasing tour or attraction packages | <input type="radio"/> | <input type="radio"/> | |
| Other (specify) | <input type="radio"/> | <input type="radio"/> | |

12. Which of the following did you use for information about Hawai'i (A) before your trip, (B) during your trip, and (C) after your trip? (Mark all that apply)

| | (A) Before | (B) During | (C) After |
|---|-----------------------|-----------------------|-----------------------|
| Travel agents | <input type="radio"/> | <input type="radio"/> | - |
| Companies specializing in packaged tours | <input type="radio"/> | <input type="radio"/> | - |
| Information from airline/commercial carriers | <input type="radio"/> | <input type="radio"/> | - |
| Information from hotels or resorts | <input type="radio"/> | <input type="radio"/> | - |
| Personal experience | <input type="radio"/> | <input type="radio"/> | - |
| Recommendations from friends or relatives | <input type="radio"/> | <input type="radio"/> | - |
| Online travel booking site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Online webpage or blog covering Hawai'i | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Online social networking site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Smartphone or tablet applications relevant to your trip | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Hawai'i's visitor bureaus website | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Magazines | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Newspapers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Books | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

13. If you used a **travel agent**, **internet**, **friends or family**, **guide books**, or **mobile apps** in planning or booking any parts of your trip, please specify how you did so below. *(Mark all that apply)*

| | Travel Agent (In person, phone or internet) | Internet (Self-planned) | Friends or Family | Guide Books | Mobile Phone or Tablet Apps |
|--|---|----------------------------|-----------------------|-----------------------|--------------------------------|
| Deciding on your vacation destination | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Choosing an airline | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Choosing a place to stay | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planning activities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making airline reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making hotel or other lodging reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Making car rental reservations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Purchasing any tour or attraction packages | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Estimating the costs of your trip | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Finding restaurants | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Finding places to shop | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Accessing maps and directions / GPS | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Checking the weather | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Airport check-in | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other (specify): | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. Not counting this trip to Hawai'i, have you taken any overnight leisure trips by air of 500 miles or longer in the past three years?

- Yes (how many?) →
- No

15. Which of the following destinations have you visited for leisure in the past 3 years? *(Mark all that apply)*

- | | |
|---|---------------------------------------|
| <input type="radio"/> Australia | <input type="radio"/> Alaska |
| <input type="radio"/> Bali | <input type="radio"/> California |
| <input type="radio"/> Canada | <input type="radio"/> Florida |
| <input type="radio"/> Caribbean | <input type="radio"/> Las Vegas |
| <input type="radio"/> China | <input type="radio"/> New York City |
| <input type="radio"/> Fiji | <input type="radio"/> Other US States |
| <input type="radio"/> Guam/Saipan | |
| <input type="radio"/> Japan | <input type="radio"/> Europe |
| <input type="radio"/> Korea | <input type="radio"/> Central America |
| <input type="radio"/> Mexico | <input type="radio"/> South America |
| <input type="radio"/> New Zealand | <input type="radio"/> Other Asia |
| <input type="radio"/> Thailand | |
| <input type="radio"/> Other (specify) _____ | |
| <input type="radio"/> NONE | |

16. Not counting this most recent trip to Hawai'i, what was the year of your last visit to Hawai'i?

17. And on that trip, which island(s) did you visit? *(Mark all that apply)*

- Island of O'ahu
 Island of Maui
 Island of Moloka'i
 Island of Lana'i
 (Hilo) Hawai'i Island
 (Kona) Hawai'i Island
 Island of Kaua'i

18. Did you ever live in Hawai'i before?

- Yes No

19. Do you have friends and/or relatives who live in Hawai'i?

- Yes No

20. Do you own property in Hawai'i?

- Yes, I own timeshare units
 Yes, I own other types of property
 No, but I plan to in the future
 No

21. For each place you visited on your most recent trip, which of the following did you use?

| | O'ahu | Maui | Kaua'i | Hawai'i Island (Hilo) | Hawai'i Island (Kona) | Moloka'i | Lana'i |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Transportation | | | | | | | |
| Airport shuttle | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Trolley | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Public Bus | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tour Bus / Tour Van | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Taxi / Limousine | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Rental Car | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Next, we would like to learn a little more about you.

22. Please indicate your highest level of educational training:

- No / some high school
- High school graduate
- Some college
- Vocational/technical
- Associates (2 year) degree
- College graduate (4 year)
- Post graduate degree

23. Which of the following categories includes your household's total annual income from all sources before taxes for 2013 (in US dollars)?

- Up to \$40,000
- \$40,000 to \$49,999
- \$50,000 to \$59,999
- \$60,000 to \$69,999
- \$70,000 to \$79,999
- \$80,000 to \$89,999
- \$90,000 to \$99,999
- \$100,000 to \$124,999
- \$125,000 to \$149,999
- \$150,000 to \$174,999
- \$175,000 to \$199,999
- \$200,000 to \$249,999
- \$250,000 or more

24. What is your employment status?

- Self-Employed
- Employed, working for someone else
- Retired
- Student
- Homemaker
- Other

25. We would like to know if you experienced any of the following while in Hawai'i. (Mark all that apply)

- Wallet/purse/valuables stolen
- Room was vandalized/robbed
- Car was vandalized/robbed
- Physical violence/harm/harassment
- Verbal harassment
- Solicited by prostitutes
- Solicited by drug dealers
- Seeing homeless people
- Received parking or other auto violations
- Severe weather/natural calamities/windy
- Service problems
- Other negative _____
- No negatives

26. Approximately how much did you and the immediate members of your travel party spend on your trip to Hawai'i? Include all shopping, dining, lodging, airfare and all other spending (in US dollars, no commas).

US\$

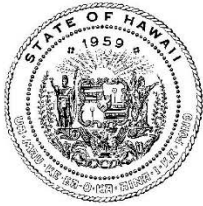
27. Please tell us about ONE detail that made your trip to Hawai'i excellent.

28. Please tell us about ONE detail that could have improved your trip to Hawai'i.

MAHALO FOR YOUR KOKUA (thank you for your help).

Your feedback is important and your opinion counts. Please return the completed survey in the postage-paid envelope as soon as possible.

JAPANESE LANGUAGE VSAT SURVEY FORM, 2014



Hawai'i Tourism Authority

Hawai'i Convention Center, 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
Website: www.hawaii tourism authority.org

NEIL ABERCROMBIE
Governor

MIKE MCCARTNEY
President and
Chief Executive Officer

Telephone: (808) 973-2255
Fax: (808) 973-2253

«idnum»

アロハ!

皆様の今回のハワイ旅行が楽しい旅行となりましたことを心から願っております。

ハワイ滞在中に感じたご意見をこのハワイ観光局 来訪者アンケートにお答え頂く形でお聞かせ頂ければ幸いです。あなたのお名前は100万以上のリストからこの来訪者アンケートのためにランダムに選び抜かれました。

私たちは、ハワイに来られる皆様ひとりひとりにできるだけ楽しい滞在を提供できるよう最善を尽くしております。私たちのそのような気持ちが同封のアンケートになりますのでどうか率直にお答え頂きたいと存じます。お答え頂いたアンケートは、皆様のハワイ滞在をより良いものにするために役立てられるもので、大変重要です。

頂いた情報については当方で厳重に管理しアンケートとしてのみ取り扱われ、第三者に漏れることは一切ありません。全ての意見は個人単位ではなく総合意見として反映させていただきます。

私たちは SMS リサーチにこのアンケート業務を委託しておりますので、記入されたアンケート用紙は、封筒（郵便料支払い済み）に入れ SMS リサーチまでご返送下さい。このアンケートはインターネットでもご参加頂けます。パソコンとインターネット接続環境をお持ちの方は以下のウェブサイトからこのアンケートにご協力頂く事をお勧め致します。

www.hawaii tourism authority.org/survey2014

インターネットでこのアンケートにご協力頂くためのパスワードはアンケート用紙の表紙の右下に記載された6桁の数字です。

このアンケートに関するご質問は、SMS リサーチ フリーダイヤル (877) 535-5767、又は電子メールで Info@SMShawaii.com までお問い合わせ下さい。この度はハワイ諸島へお越し下さり、また貴重なお時間を有難うございました。

Sincerely,

Mike McCartney
President and Chief Executive Officer



HAWAII TOURISM AUTHORITY

2014 年来訪者アンケート

パソコンとインターネット接続環境をお持ちの方は、下記 Web サイトでアンケートにご協力下さい

www.hawaii tourism authority.org/survey2014

パスワードはこのページ内 右下の 6 桁の数字です

アロハ! 今回のハワイ旅行について、下記の質問に率直にお答え下さい。ハワイ諸島に來られる方への対応をより良く改善するために、貴重なお意見を是非お聞かせ下さい。お答え頂いたアンケートは、皆様のハワイ滞在をより良いものとするために役立てられるもので、大変重要です。頂いた情報については、当方で厳重に管理し、第三者に漏れることは一切ありません。全ての意見は個人単位ではなく総合意見として反映させて頂きます。マハロ!

記入方法: 該当する解答欄に (●) 印をペンまたは濃い鉛筆でご記入下さい。記入された調査表は、封筒 (郵便料支払い済み) に入れ、できるだけ早急にご返送下さい。

| 印の付け方 | |
|-------------------|--------------------|
| 正しい印 ● ● ● ● ● | 間違った印 ○ ○ ○ ○ ○ |

1. 今回のハワイ旅行は全般的にいかがでしたか?

| | | | |
|--------|----------|-----------|------|
| 大変良かった | まあまあ良かった | あまり良くなかった | 悪かった |
| 8 | 7 | 6 | 5 |
| 4 | 3 | 2 | 1 |
| ○ | ○ | ○ | ○ |

2. 今回のハワイ旅行は期待に沿うものでしたか?

- 期待以上だった
- 期待通りだった
- 期待以下だった

3. お友達やご家族にハワイ旅行をすすめますか?

- すすめる
- たぶんすすめる
- あまりすすめない
- すすめない

4. 今後 5 年間にまたハワイを訪れると思いますか?

- 訪れる----- Q5a に飛ぶ
- たぶん訪れる----- Q5a に飛ぶ
- たぶん訪れない----- 次に進む
- 訪れない----- 次に進む

4b. ハワイを訪れないと思われる理由は何ですか?
(該当するもの全てに印を付けて下さい)

- 飛行時間が長すぎる
- 営利本位である/開発されすぎている
- 混雑しすぎている/交通の便が悪い/渋滞
- 価格に見合う価値がない
- もっと違うところに行きたい
- 他の財政負担がある
- サービスが悪い
- 不親切な地元住民/歓迎されていない気がした
- 健康上の理由/年齢の制限
- 5 年以内に旅行は難しい
- 物価が高すぎる
- その他 (具体的に) _____

- 5a. 今回のハワイ旅行の主な目的は何でしたか？
 5b. その他の目的があるとしたら、それは何でしたか？

| | Q5a. 主な目的 (回答は1つのみ) | Q5b. その他の目的 (複数回答可) |
|---------------------------|---------------------------|---------------------------|
| 休暇 / 観光 | <input type="radio"/> | <input type="radio"/> |
| ビジネス会合 / 仕事 | <input type="radio"/> | <input type="radio"/> |
| 集会 / 会議 / セミナー | <input type="radio"/> | <input type="radio"/> |
| 招待 / 懸賞旅行 | <input type="radio"/> | <input type="radio"/> |
| 友人 / 親戚訪問 | <input type="radio"/> | <input type="radio"/> |
| 結婚 | <input type="radio"/> | <input type="radio"/> |
| 結婚式出席 / 参列 | <input type="radio"/> | <input type="radio"/> |
| ハネムーン | <input type="radio"/> | <input type="radio"/> |
| 記念日 / 誕生日 | <input type="radio"/> | <input type="radio"/> |
| 文化・歴史行事あるいは音楽イベントに出席 / 参加 | <input type="radio"/> | <input type="radio"/> |
| スポーツ行事出席 / 参加 | <input type="radio"/> | <input type="radio"/> |
| 治療 | <input type="radio"/> | <input type="radio"/> |
| 買物 / ファッション | <input type="radio"/> | <input type="radio"/> |
| 教育 / 学校訪問 | <input type="radio"/> | <input type="radio"/> |
| 家族の集い / 同窓会 | <input type="radio"/> | <input type="radio"/> |
| 不動産購入あるいは視察 | <input type="radio"/> | <input type="radio"/> |
| その他 (具体的に) _____ | <input type="radio"/> | <input type="radio"/> |

6. 今回のハワイ旅行が休暇（観光）が目的で来られていた場合、どれに当てはまりますか？
 (回答は1つのみ)
- 生涯に1度の旅行
 - 特別な機会
 - 今までの旅行よりも特別
 - 年に1回又は2回の定期的な旅行
 - その他

7. 今回の旅行の同行者
 (該当するもの全てに印を付けて下さい)

- 一人旅
- 配偶者
- 18歳未満の子供 / 孫
- その他の家族 大人
- 友人 / 仲間
- 彼女 / 彼氏
- 同性のパートナー

8. 滞在された各島ではどのような宿泊施設をご利用になりましたか？

| | コンド | | タイム シェア | 友人や 親戚の家 | 自己所有 の家 | バケーション | | |
|------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | ホテル | ミニウム | | | | Ｂ＆Ｂ | 旅客船 | レンタル |
| オアフ島 (ワイキキ/ホノルル) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| マウイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| モロカイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ラナイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ハワイ島 (ヒロ) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ハワイ島 (コナ) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| カウアイ島 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

9. 今回訪れた各島では何をしましたか？

| | オアフ島 | マウイ島 | カウアイ島 | ハワイ島 (ヒロ) | ハワイ島 (コナ) | モロカイ島 | ラナイ島 |
|---------------------------|------|------|-------|-----------|-----------|-------|------|
| 観光 | | | | | | | |
| 個人(自分で観光した) / 島内をドライブ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ヘリコプター/ 飛行機ツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ボートツアー/ 潜水艦 / ホエールウォッチング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 地域訪問 - チャイナタウン、ハレイワなど | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| リムジン/バンツアー/ 観光バスツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 展望台/ 眺望スポット | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 映画、テレビのロケ地ツアー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| レクリエーション | | | | | | | |
| ビーチ/ 日光浴 / 海水浴 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| サーフィン/ ボディボード / パドルボード | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| カメラ/ カヤック | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スノーケル/ スキューバーダイビング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ジェットスキー/パラセーリング/ウィンドサーフィン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ゴルフ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ランニング/ ジョギング/ ウォーキング | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スパ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| バッグパッキング/ ハイキング/ キャンプ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 農業体験 - 農園、牧場など | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スポーツ行事/ トーナメント | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 州立公園 / 植物園 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| エンターテインメントとダイニング | | | | | | | |
| ランチ/サンセット/ディナー/イブニングクルーズ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 生演奏/ ステージショー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ナイトクラブ/ダンス/バー/カラオケ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 高級料理店 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファミリーレストラン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファーストフード | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| カフェ/ コーヒーハウス | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| エスニック料理 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 自分で調理する | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ショッピング | | | | | | | |
| モール / デパート | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 有名ブランドブティック | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ホテル内のショップ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スワップミート/ フリーマーケット | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ディスカウント/ アウトレットストア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| スーパー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ファーマーズマーケット (朝市) | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| コンビニエンスストア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 免税店 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ローカルショップと地元の職人 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 歴史、文化、美術 | | | | | | | |
| 戦争史跡 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| その他の史跡 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 美術館/ アートギャラリー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ルアウ | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ポリネシアンショー/ フラショー | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| レッスン-フラやカヌーなど | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| ウクレレレッスン | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 演劇/ コンサート/ シアター | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| アート/ クラフトフェア | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| お祭り (具体的に) | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 仕事 | | | | | | | |
| 会合 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |
| 集会 / 会議 | ○ | ○ | ○ | ○ | ○ | ○ | ○ |

10. 今回訪れた各島ではいかがでしたか？

| | 大変良かった | 良かった | あまり良く なかった | 悪かった | 訪問しな かった |
|-----------------|--------|------|---------------|------|-------------|
| オアフ島（ワイキキ／ホノルル） | ○ | ○ | ○ | ○ | ○ |
| マウイ島 | ○ | ○ | ○ | ○ | ○ |
| モロカイ島 | ○ | ○ | ○ | ○ | ○ |
| ラナイ島 | ○ | ○ | ○ | ○ | ○ |
| ハワイ島（ヒロ） | ○ | ○ | ○ | ○ | ○ |
| ハワイ島（コナ） | ○ | ○ | ○ | ○ | ○ |
| カウアイ島 | ○ | ○ | ○ | ○ | ○ |

今回のハワイ旅行を計画された際、いつ頃その計画を決定なさいましたか？

11a. もし、旅行中に決定した場合は印を付けて下さい。

11b. もし、旅行前に決定した場合は印を付けて下さい。

もし、旅行前と旅行中に決定した場合は両方に印を付けて下さい。

11c. もし11bに印を付けられた場合、何ヶ月前に決定したか数字をご記入ください。

もし1ヶ月以内に決定した場合は‘0’をご記入ください。

| | 11a. 旅行中 | 11b. 旅行前 | 11c. 月数 | | |
|----------------------|----------|----------|---------|--|--|
| 休暇 / 観光旅行を決めた | - | ○ | | | |
| ハワイ旅行を決定 | - | ○ | | | |
| 訪問する島を決定 | ○ | ○ | | | |
| 日程を決定 | ○ | ○ | | | |
| 航空券を予約 | ○ | ○ | | | |
| 宿泊先の選択 | ○ | ○ | | | |
| 航空券を購入 | ○ | ○ | | | |
| 宿泊施設を予約 | ○ | ○ | | | |
| レンタカーを予約 | ○ | ○ | | | |
| オプションツアー/ アトラクションを購入 | ○ | ○ | | | |
| その他（具体的に） | ○ | ○ | | | |

12. (A) 旅行前 (B) 旅行中 (C) 旅行後に以下のどれを使用してハワイの情報を得ましたか？
(該当するもの全てに印を付けて下さい)

| | (A) 旅行前 | (B) 旅行中 | (C) 旅行後 |
|-----------------------------|---------|---------|---------|
| 旅行代理店 | ○ | ○ | - |
| パッケージツアー専門の会社 | ○ | ○ | - |
| 航空会社が提供する情報 | ○ | ○ | - |
| ホテル/ リゾートが提供する情報 | ○ | ○ | - |
| 個人の旅行経験 | ○ | ○ | - |
| 友人/ 親戚のアドバイス | ○ | ○ | - |
| インターネットの旅行予約サイト | ○ | ○ | ○ |
| ハワイについてのブログ、ホームページ | ○ | ○ | ○ |
| ソーシャルネットワーキングサイト | ○ | ○ | ○ |
| スマートフォン、タブレット型PCなどの旅行関連のアプリ | ○ | ○ | ○ |
| ハワイ州観光局ホームページ | ○ | ○ | ○ |
| 雑誌 | ○ | ○ | ○ |
| 新聞 | ○ | ○ | ○ |
| 本 | ○ | ○ | ○ |

13. 旅行代理店、インターネット、友達や家族、ガイドブック、モバイルアプリを旅行の計画や予約の際に利用された場合、何にそれらを利用なさいましたか？ (該当するもの全てに印を付けて下さい)

| | 旅行代理店 (直接、電話 インターネット) | インターネット (自身で計画) | 友達や家族 | ガイドブック | モバイルフォン タブレット型PC |
|------------------|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 旅行の行き先の決定 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 航空会社の選択 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 宿泊先の選択 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| アクティビティの計画 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 航空券の予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ホテル、宿泊施設の予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| レンタカーの予約 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| オプション、アトラクションの購入 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 旅費の見積もり | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| レストランの検索 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 買物場所の検索 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 地図や行き方 / GPS | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 天気チェック | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 空港チェックイン | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| その他 (具体的に): | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. 今回のハワイ旅行以外に、過去3年間に飛行機を利用した500マイル(約800Km)以上の観光旅行(1泊以上)をなさいましたか？

- はい (何回?) →
 いいえ

15. 過去3年間にどこかを観光旅行なさいましたか？ (該当するもの全てに印を付けて下さい)

- オーストラリア アラスカ
 パリ カリフォルニア
 カナダ フロリダ
 カリブ ラスベガス
 中国 ニューヨーク
 フィジー 他のアメリカの州
 グアム / サイパン
 日本国内
 韓国
 メキシコ
 ニュージーランド
 タイ

 ヨーロッパ
 中央アメリカ
 南アメリカ
 他のアジア
 その他 (具体的に) _____
 該当なし

16. 前回のハワイ旅行は何年でしたか？ (今回の旅を除く)

17. その際どの島に行かれましたか？ (該当するもの全てに印を付けて下さい)

- オアフ島
 マウイ島
 モロカイ島
 ラナイ島
 ハワイ島 (ヒロ)
 ハワイ島 (コナ)
 カウアイ島

18. ハワイに住んだことがありますか？

- はい いいえ

19. ハワイ在住の友人/ 親戚がいますか？

- はい いいえ

20. ハワイに不動産を所有していますか？

- はい、タイムシェアを所有しています
 はい、タイムシェア以外の不動産を所有しています
 いいえ、でも将来に考えています
 いいえ

21. 今回訪れた各島でのアクセスを利用されましたか？

| | オアフ島 | マウイ島 | カウアイ島 | ハワイ島 (ヒロ) | ハワイ島 (コナ) | モロカイ島 | ラナイ島 |
|--------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 交通 | | | | | | | |
| 空港シャトル | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| トロリー | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 公共バス | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 観光バス / ツアーバン | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| タクシー / リムジン | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| レンタカー | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

次に、もう少しあなたのことをお聞かせ下さい。

22. 最終学歴をご記入下さい

- 中学校卒 / 高校中退
- 高校卒業
- 短大、大学中退
- 職業訓練校/ 技術専門学校
- 2年生短大卒
- 4年生大学卒
- 大学院卒

23. あなたの(世帯)の2013年度総年収(税込)は次のどれに当てはまりますか？

- 350万円未満
- 350万円以上、450万円未満
- 450万円以上、550万円未満
- 550万円以上、650万円未満
- 650万円以上、750万円未満
- 750万円以上、850万円未満
- 850万円以上、1,000万円未満、
- 1,000万円以上

24. あなたの職業は？

- 自営業
- 学生
- 主婦
- その他
- 定年退職者
- 就業者

27. 今回のハワイ旅行で 素晴らしいと感じた事を1つだけ詳しくご記入下さい。

28. 今回のハワイ旅行で改善すべきと感じた事を1つだけ詳しくご記入下さい。

25. ハワイに来られる皆様の安全と快適さは、我々にとって重要な問題です。ハワイ滞在中に以下の出来事に遭遇しましたか？(該当するもの全てに印を付けて下さい)

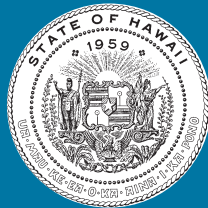
- 財布/バッグ/貴重品の盗難
- 客室荒らし/ 客室強盗
- 車上荒らし/ 車上強盗
- 身体的な暴力/ 被害/ ハラスメント
- 言葉によるハラスメント
- 売春婦に執拗につきまとわれた
- 麻薬を売りつけられそうになった
- ホームレスを見た
- 駐車違反/その他の交通違反
- 悪天候/ 自然災害/ 暴風
- サービス上の問題
- その他 問題点 _____
- 問題点なし

26. 今回のハワイ旅行ではあなたと同行者全員の出費も含めていくらお使いになりましたか？買物、食事、宿泊、飛行機、その他の出費も全て含めて下さい。(米ドル表記、コンマなし)

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

ご協力ありがとうございました。

皆様から寄せられたご意見は非常に重要です。記入された調査表は、同添の封筒(郵便料支払い済み)に入れ、できるだけ早急に投函して下さいますようお願い致します。



HAWAII TOURISM

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