



Fourth Quarter 2016

Visitor Satisfaction  
Monitoring Report

HAWAII TOURISM

AUTHORITY

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## INTRODUCTION

This quarterly monitoring report presents selected preliminary statistics from the fourth quarter of the 2016 Visitor Satisfaction and Activity (VSAT) Survey. The survey measures the opinions of visitors from eight visitor groups: U.S. West, U.S. East, Japan, Canada, Europe, Oceania, China and Korea regarding their satisfaction with Hawai'i as a visitor destination.

The VSAT quarterly report highlights survey respondents' evaluation of their vacation experience, including: overall satisfaction with their most recent vacation to Hawai'i, trip expectations, likelihood to recommend Hawai'i, likelihood to revisit Hawai'i, reasons for not revisiting Hawai'i, and satisfaction by island. Information about respondents' trip planning, and the resources used in trip planning are also presented.

Selected U.S. West, U.S. East, Japanese, Canadian, European and Oceania visitors were mailed a survey form or were contacted via email to complete the survey on-line. Beginning in January 2016, data for Chinese and Korean visitors were collected via intercept surveys at the Honolulu International Airport using iPad tablets.

### Condition of Visitor Industry

Total visitor arrivals by air in the fourth quarter (October to December) of 2016 increased 3.6 percent, compared to the fourth quarter of 2015, to 2,097,862 visitors.

There were more visitors from U.S. West (+4.8% to 917,048 visitors), U.S. East (+4.2% to 437,292), Japan (+1.5% to 385,240) and Korea (+23.8% to 74,244), but fewer visitors from Oceania (-1.5% to 98,756), Europe (-0.6% to 32,489) and China (-7.4% to 31,240). Arrivals from Canada (+0.1% to 135,660) were comparable to fourth quarter 2015. The average length of stay for all visitors to the state was 9.06 days, down slightly from fourth quarter 2015 (9.16 days).

## VISITOR SATISFACTION RATINGS

Visitor satisfaction is an important indicator of industry performance. Because it is based on visitor evaluations, it provides vital feedback concerning how well services are delivered in Hawai'i. Satisfying visitors' needs and expectations encourages return trips to the islands. Satisfied customers also develop a fondness for the destination and tend to share their favorable assessment with others. Table 1 below, shows the percent of respondents who rated their trip as "excellent" (7 or 8, on an 8-point scale). The majority of the respondents from each visitor market gave the highest marks for their overall experience in Hawai'i.

**Table 1: Overall Rating of Trip**  
(Percentage of respondents who rated their most recent trip "excellent" by MMA)

MMA	2014				2015				2016P			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
U.S. West	82	82	82	81	82	84	83	87	89	89	88	88
U.S. East	82	85	84	84	88	89	85	90	91	90	90	90
Japan	63	69	74	69	69	70	72	67	75	77	78	78
Canada	80	84	86	86	83	84	82	85	88	88	89	88
Europe	77	82	91	85	88	88	89	87	91	86	91	89
Oceania	77	79	79	73	83	77	74	75	80	81	81	82
China									76	64	76	77
Korea									78	82	73	78

P=Preliminary

- In the fourth quarter of 2016, close to 90 percent of U.S. West, U.S. East, Canadian and European respondents, and nearly 80 percent of Japanese and Oceania respondents rated their most recent trip to Hawai'i as excellent. Ratings from these visitor markets have shown overall improvement over the last three years.
- Excellent ratings by respondents from Japan (+11 points) and Oceania (+7 points) increased compared to fourth quarter 2015.
- Eight out of ten Chinese and Korean respondents in the fourth quarter of 2016 gave excellent ratings to their trip to Hawai'i.

### Exceeded Expectations

Visitors' satisfaction is largely influenced by the level of service they received and by visitors' own needs, interests, and expectations. Visitors were asked if their Hawai'i trip "exceeded" expectations, "met" expectations or "did not meet" expectations.

In fourth quarter 2016, very few respondents from U.S. West (3%), U.S. East (3%), Japan (2%), Canada (2%), Europe (3%), Oceania (4%) and Korea (3%) said that Hawai'i "did not meet" their expectations. A slightly higher percentage of Chinese (7%) respondents felt this way.

**Table 2: Trip Exceeds Expectations  
(Percentage of visitors who said this trip “Exceeded” Expectations by MMA)**

MMA	2014				2015				2016P			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
U.S. West	33	34	38	34	35	38	37	40	42	44	42	42
U.S. East	45	53	51	46	43	51	47	53	50	53	56	53
Japan	29	31	35	36	33	34	35	35	37	39	37	39
Canada	35	46	54	39	37	45	43	40	44	50	51	46
Europe	48	40	55	52	56	53	51	48	57	54	52	53
Oceania	38	33	37	40	41	40	31	35	39	37	39	39
China									28	21	9	16
Korea									55	59	53	55

P=Preliminary

- Ratings by Canadian (+6 points to 46%), European (+5 points to 53%), Japanese (+4 points to 39%) and Oceania (+4 points to 39%) respondents improved compared to fourth quarter 2015. Ratings by U.S. West and U.S. East respondents were consistent with last year.
- Over half of Korean respondents in fourth quarter 2016 said Hawai'i exceeded their expectations.
- Chinese visitors were more critical about Hawai'i than other visitor groups. Only 16 percent of the respondents felt that Hawai'i exceeded their expectations, 78 percent said the trip met their expectations, while 7 percent said their expectations were not met.

### Very Likely to Recommend Hawai'i

Visitors who are satisfied with their trip are more likely to recommend their destination to friends and family. Relatively high percentages of visitors who came to Hawai'i have reported that they would “very likely” recommend Hawai'i to others.

In fourth quarter 2016, only a small percentage of U.S. West (1%), U.S. East (2%), Japanese (2%), Canadian (1%), European (2%), Oceania (3%) and Korean (2%) visitors said that they would “not too likely” or “not at all likely” recommend Hawai'i to their friends and relatives. Chinese respondents were harder to please, as 9 percent said they would “not too likely” or “not at all likely” recommend Hawai'i.

**Table 3: Very Likely to Recommend Hawai'i to Friends and Relatives  
(Percentage of visitors who are “Very Likely” to recommend Hawai'i by MMA)**

MMA	2014				2015				2016P			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
U.S. West	90	87	88	88	89	91	90	90	90	91	88	90
U.S. East	87	87	88	87	90	90	86	88	88	87	88	88
Japan	74	73	78	74	76	74	79	74	74	80	81	78
Canada	88	89	93	90	90	89	87	88	91	91	89	90
Europe	78	77	87	84	85	82	83	83	86	81	87	84
Oceania	81	82	85	79	82	82	78	78	76	81	80	81
China									81	66	72	66
Korea									84	84	83	83

P=Preliminary

- Nine out of ten U.S. West, U.S. East and Canadian respondents in fourth quarter 2016 would very likely recommend Hawai'i to friends and relatives. These ratings have been relatively consistent over the last three years.
- Slightly more than 80 percent of respondents from Oceania and Europe would very likely recommend Hawai'i. Their ratings in fourth quarter 2016 were similar with a year ago.
- Japanese visitors' ratings have been hovering near 80 percent. Ratings for fourth quarter 2016 improved 4 points from fourth quarter 2015.
- In fourth quarter 2016, 83 percent of Korean respondents and 66 percent of Chinese respondents would very likely recommend Hawai'i to their friends and relatives.

### Likelihood to Revisit Hawai'i in the Next Five Years

A visitor's decision to return to Hawai'i is influenced by positive experiences on the most recent trip and other factors such as curiosity for new experiences, available time, financial situation, and other commitments. Likelihood to revisit Hawai'i as an indicator, helps estimate future demand and changes in desires.

**Table 4: Very Likely to Revisit Hawai'i in the Next Five Years**  
(Percentage of visitors who are "Very Likely" to revisit Hawai'i in the next five years by MMA)

MMA	2014				2015				2016P			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
U.S. West	78	72	74	79	79	77	75	81	82	82	76	79
U.S. East	55	48	52	54	62	54	53	61	61	55	60	59
Japan	47	52	57	47	52	52	55	51	48	54	60	54
Canada	64	61	55	66	66	60	55	64	68	67	63	67
Europe	34	34	37	40	51	40	38	49	54	39	42	45
Oceania	51	47	53	51	62	54	48	53	59	58	60	60
China									60	54	52	52
Korea									79	78	82	80

P=Preliminary

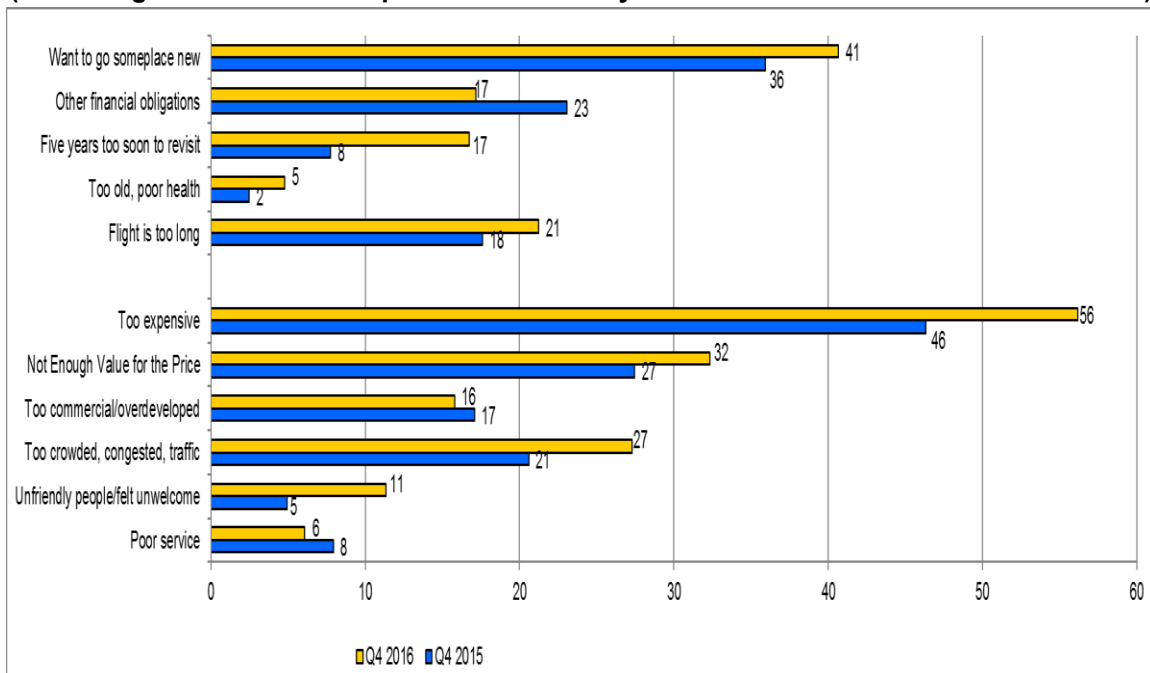
- U.S. West respondents continued to show the highest overall willingness to revisit Hawai'i (about 80%). Ratings for fourth quarter 2016 were similar to last year.
- Ratings by Oceania respondents improved 7 points to 60 percent, who indicated that they will very likely return.
- With the long distance and no direct flights to Hawai'i, European visitors continued to show the lowest percentage of likelihood to return (45%).
- Eight out of ten Korean respondents and 52 percent of Chinese respondents in fourth quarter 2016 said that they would very likely revisit Hawai'i in the next five years.

## Reasons for Not Revisiting Hawai'i in the Next Five Years

Visitors who said that they would not likely revisit Hawai'i in the next five years cited many reasons for that decision. Understanding those reasons allows us to distinguish dissatisfied visitors (i.e., those who are unwilling to return) from those who are unable to return due to health, financial, or other constraints.

In Figures 1 to 8, visitors' reasons for not returning were separated into two groups: "barriers to returning" and "performance issues." Barriers appear at the top of each figure and performance issues are at the bottom. "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. Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were not likely to revisit Hawai'i.

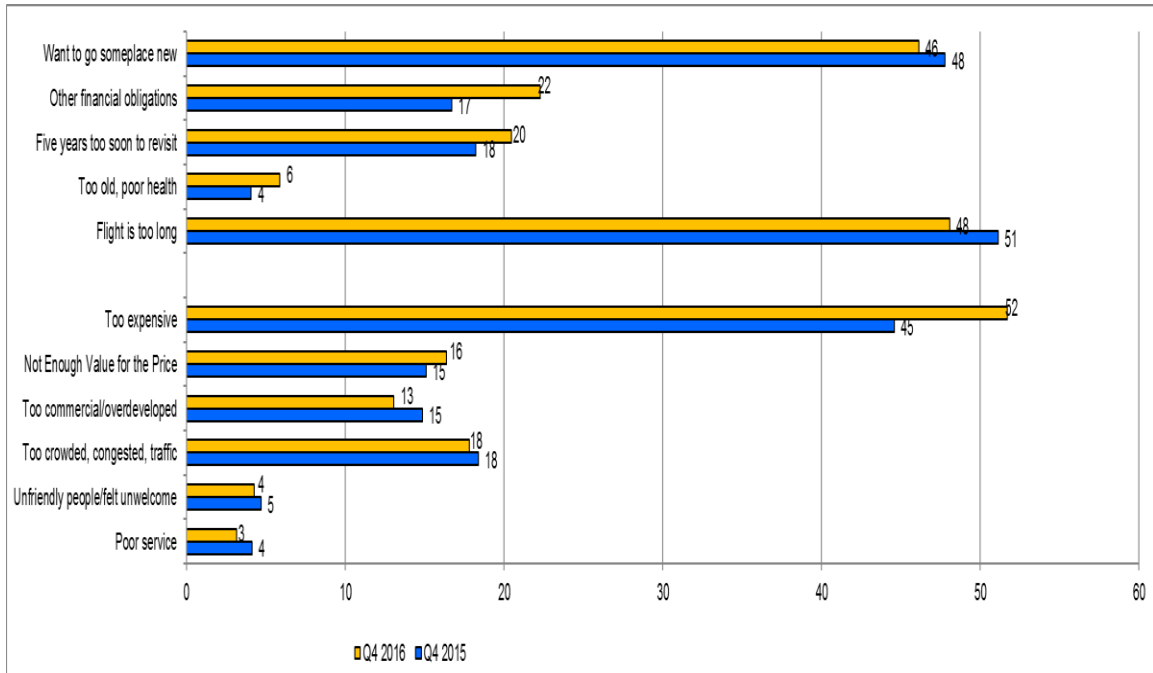
**Figure 1: U.S. West Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of U.S. West Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among U.S. West respondents in fourth quarter 2016, 41 percent said they would not likely return because they want to go someplace new, up 5 points from last year. More respondents also said that five years is too soon to revisit (+9 points to 17%).

The high cost was an issue for a larger percentage of U.S. West respondents (56%) compared to those who came in fourth quarter 2015 (46%). More visitors also said that there is not enough value for the price (+5 points to 32%), Hawai'i is too crowded/congested (+6 points to 27%), and that they encountered unfriendly people/felt unwelcome (+6 points to 11%).

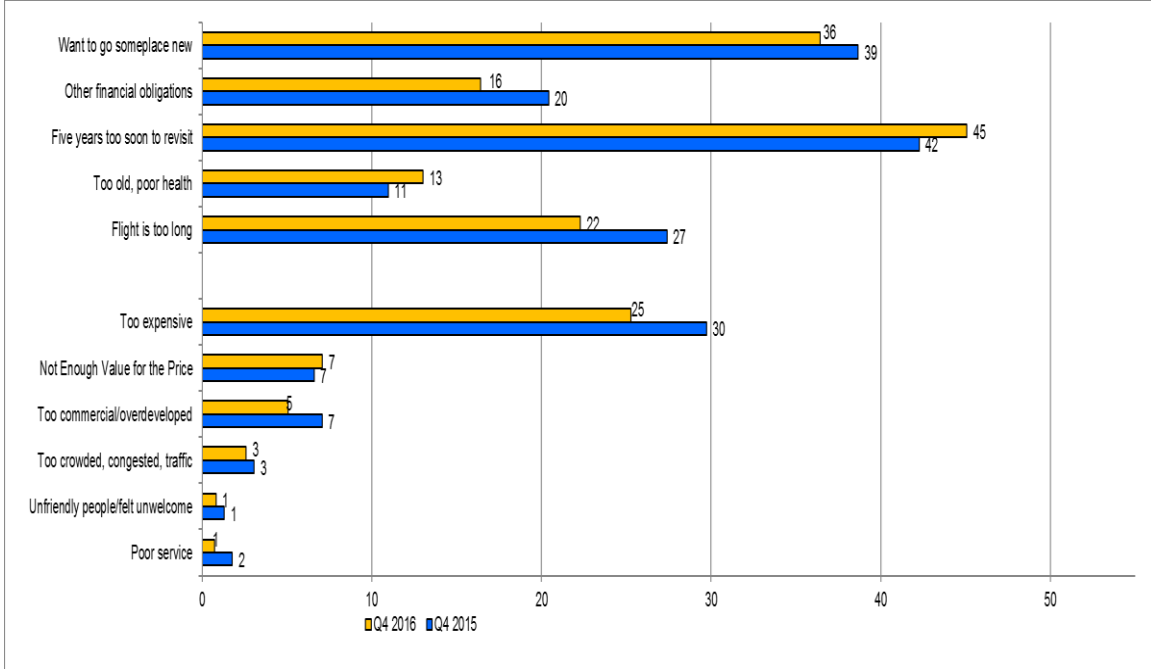
**Figure 2: U.S. East Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



In fourth quarter 2016, the long flight (48%) and the desire to go someplace new (46%) continued to be barriers for U.S. East visitors to return to Hawai'i.

More U.S. East visitors said that Hawai'i is too expensive (+7 points 52%) compared to fourth quarter 2015. Other reasons provided were not enough value for the price (16%), Hawai'i is too crowded/congested (18%), and Hawai'i is too commercial/developed (13%).

**Figure 3: Japanese Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Japanese Respondents not Likely to Revisit Hawai'i in the Next Five Years)**

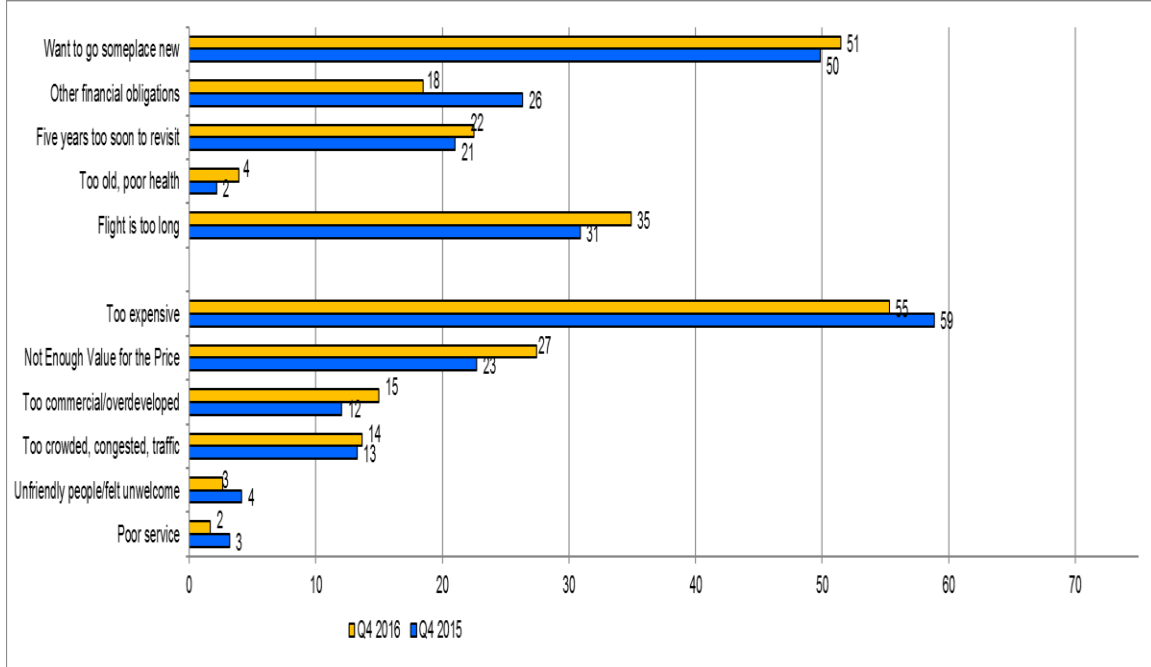


Japanese respondents in fourth quarter 2016 continued to cite more barriers than performance-related issues as reasons for not returning. Nearly half of the respondents indicated that five years is too soon to revisit (45%). Some respondents want to go to a new destination (36%), cited the long flight (-5 points to 22%) or have other financial obligations (16%).

Fewer Japanese visitors in fourth quarter 2016 said that Hawai'i is too expensive (-5 points to 25%) compared to those who came last year.



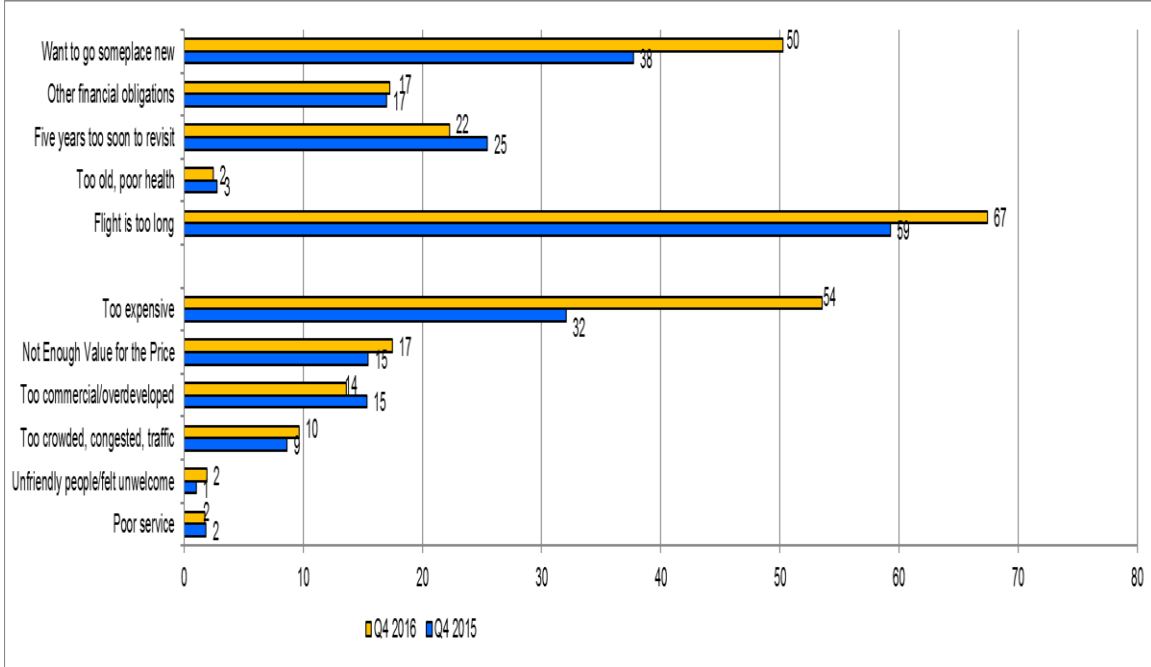
**Figure 4: Canadian Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Canadian respondents in the fourth quarter of 2016, the desire to go someplace new (51%) continued to be the main barrier to revisiting Hawai'i. Other reasons for not returning were the long flight (+35%) and five years is too soon to revisit (22%).

Similar with U.S. visitors, the primary performance-related issue for Canadian visitors continued to be the high cost (55%). Some Canadian respondents indicated that there is not enough value for the price they paid (27%), Hawai'i is too commercial/overdeveloped (15%), and too crowded/congested (14%).

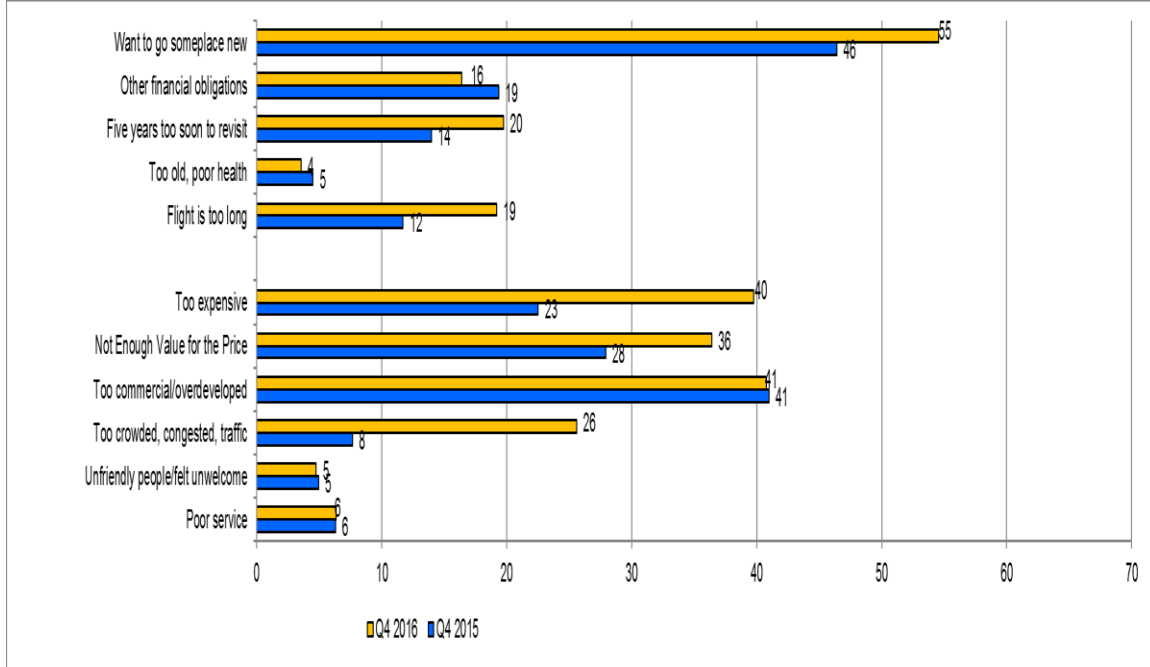
**Figure 5: European Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of European Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



For European respondents, the long flight (+8 points to 67%) continued to be the main barrier to revisiting the islands. More respondents also cited the desire to go someplace new (+12 points to 50%) compared to fourth quarter 2015.

The high cost has become an increasing concern for European visitors. Over half of the respondents in fourth quarter 2016 said they will not revisit because Hawai'i is too expensive (54%), up 22 points from last year.

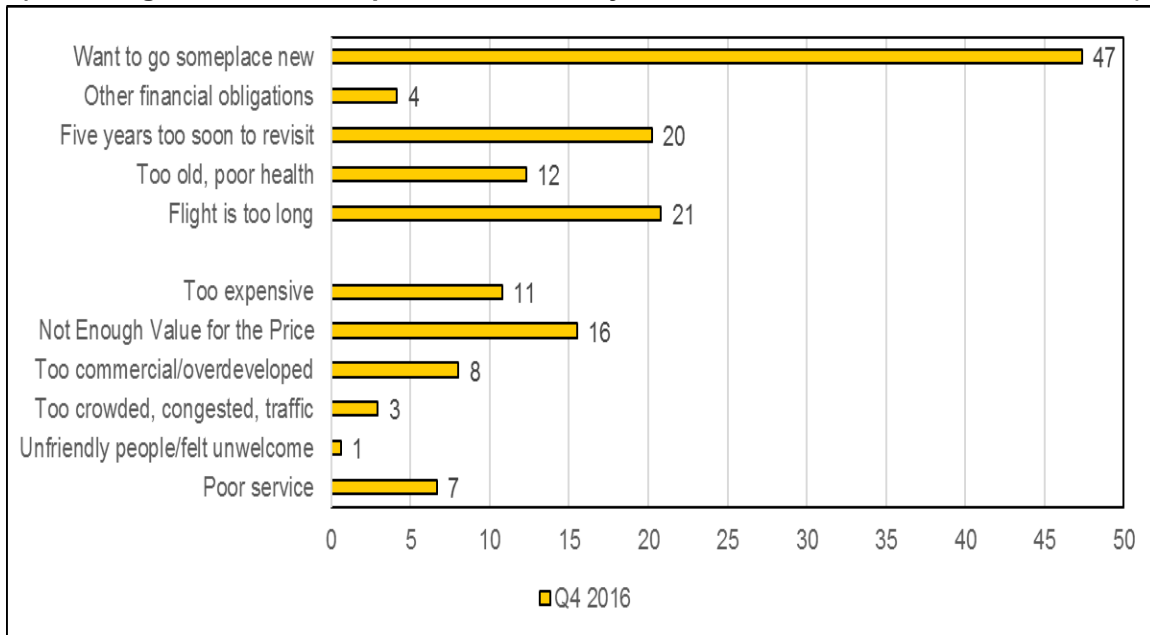
**Figure 6: Oceania Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Oceania visitors, the most cited barrier to revisiting Hawai'i continued to be the desire to go someplace new (55%), which increased 9 points from fourth quarter 2015. More visitors also mentioned the long flight (+7 points to 19%) or indicated that five years is too soon to revisit (+6 points to 20%).

In terms of performance-related issues, 41 percent of the respondents felt that Hawai'i is too commercial/developed. More respondents said they won't return because Hawai'i is too expensive (+17 points to 40%), and there is not enough value for the price (+8 points to 36%) compared to a year ago.

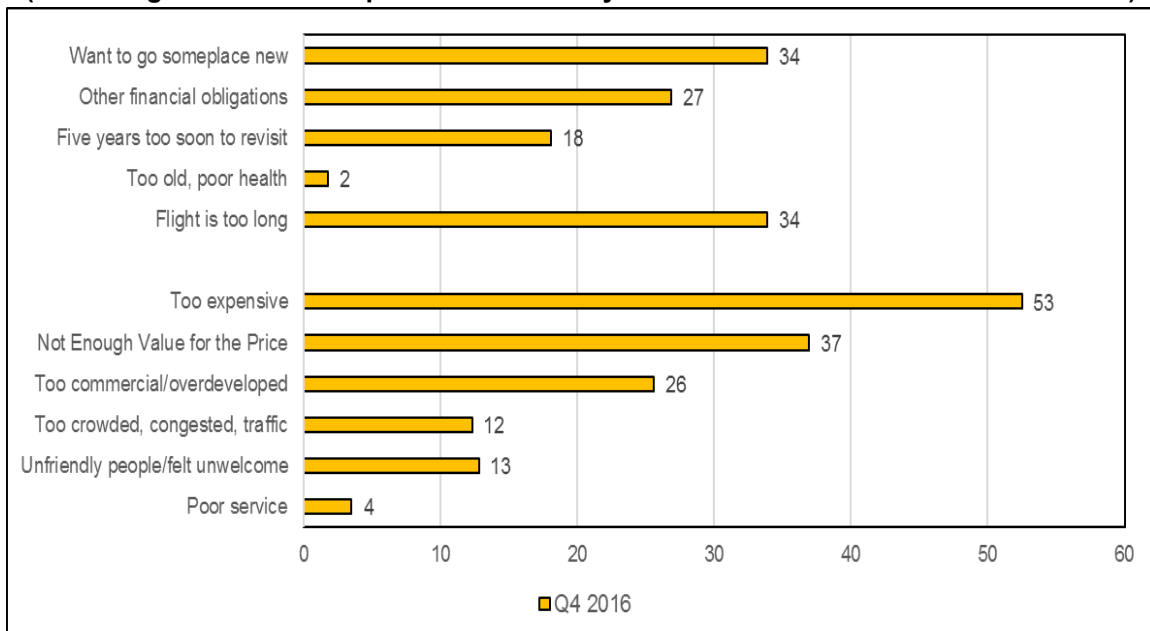
**Figure 7: Chinese Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Chinese Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Chinese respondents in fourth quarter 2016, the desire to go someplace new (47%) was the main barrier to revisiting Hawai'i. The flight is too long (21%) and five years is too soon to revisit (20%) were other reasons provided.

Not enough value for the price they paid (16%) and the high cost (11%) were less concerning for Chinese respondents compared to respondents from other visitor groups.

**Figure 8: Korean Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Korean Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



For Korean respondents in fourth quarter 2016, the high cost (53%) was the main reason why they will not be returning to Hawai'i. Four out of ten respondents felt that there was not enough value for the price they paid, while 26 percent said Hawai'i is too commercial/overdeveloped.

The most cited barriers to returning was the long flight (34%) and the desire to go someplace new (34%).

## Individual Island Experience

Each island in Hawai'i has unique characteristics, activities, and products that attract different kinds of visitors and produce varied visitor experiences. The VSAT survey asks Hawai'i visitors to rate their experience on each island they visited.

**Table 5: Island Experience Rated as Excellent – U.S. West  
(Percentage of U.S. West Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	46	53	57	49	50	57	55	58	80	79	81	79
Maui	63	67	68	68	65	68	65	71	86	91	84	87
Hawai'i Island	57	58	69	62	64	65	61	66	79	82	82	79
Kaua'i	59	70	75	70	71	69	71	72	93	94	92	93

P=Preliminary.

Most U.S. West visitors in fourth quarter 2016 gave excellent ratings to the island they visited. Kaua'i and Maui continued to score higher than O'ahu and the island of Hawai'i.

**Table 6: Island Experience Rated as Excellent – U.S. East  
(Percentage of U.S. East Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	55	59	58	57	63	60	55	59	78	78	77	78
Maui	73	79	75	70	72	77	74	76	90	90	89	91
Hawai'i Island	59	64	64	57	70	73	65	67	81	84	84	82
Kaua'i	66	81	83	76	77	83	79	80	90	94	93	93

P=Preliminary

Over 90 percent of U.S. East respondents who visited Kaua'i and Maui in fourth quarter 2016 rated their experience as excellent. The island of Hawai'i received excellent ratings from 82 percent of the respondents, while 78 percent gave excellent marks to O'ahu.

<sup>1</sup> Beginning with the 2016 VSAT survey, response options for satisfaction by island were changed from a 4-point scale to an 8-point scale. While additional variances in the measure will enable more detailed analysis going forward, 2016 data will not be comparable to previous years. 2016 percentages shown in Tables 5 through 11 are the sum of responses 7 and 8, divided by the total responses.

**Table 7: Island Experience Rated as Excellent – Japan  
(Percentage of Japanese Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	52	53	62	56	61	56	57	54	73	77	77	76
Maui	50	49	62	71	65	53	57	47	71	75	70	75
Hawai'i Island	59	63	64	56	54	58	57	46	28	66	72	74
Kaua'i	51	62	31	53	43	71	60	29	63	85	70	70

P=Preliminary.

The majority of Japanese respondents who visited O'ahu, Maui, Kaua'i and the island of Hawai'i in fourth quarter 2016 rated their experience as excellent.

**Table 8: Island Experience Rated as Excellent – Canada  
(Percentage of Canadian Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	49	55	59	60	55	59	51	58	76	79	78	78
Maui	63	61	72	64	60	68	70	69	86	90	86	87
Hawai'i Island	57	60	60	63	64	58	63	54	58	76	76	75
Kaua'i	56	63	69	68	64	70	72	69	89	89	91	89

P=Preliminary.

A larger percentage of Canadian respondents in fourth quarter 2016 continued to give excellent ratings to Kaua'i and Maui compared to O'ahu and the island of Hawai'i.

**Table 9: Island Experience Rated as Excellent – Europe  
(Percentage of European Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	51	46	61	46	59	55	54	57	80	77	78	77
Maui	65	57	71	66	67	68	70	70	90	84	88	87
Hawai'i Island	53	62	55	68	61	60	61	64	63	74	79	74
Kaua'i	81	73	87	70	78	78	81	76	93	95	94	93

P=Preliminary.

European respondents in fourth quarter 2016 continued to rate Kaua'i the highest among the islands. Maui received the next largest percent of excellent ratings, followed by O'ahu and the island of Hawai'i.

**Table 10: Island Experience Rated as Excellent – Oceania  
(Percentage of Oceania Respondents by Island)**

Island	2014				2015				2016P <sup>1</sup>			
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	52	50	52	50	61	56	53	52	76	78	77	78
Maui	53	67	55	64	65	59	56	54	70	89	76	81
Hawai'i Island	48	62	58	66	57	52	55	59	79	83	77	81
Kaua'i	40	71	53	66	52	65	62	66	69	89	83	86

P=Preliminary.

Most Oceania respondents who went to O'ahu, Maui, Kaua'i and the island of Hawai'i in fourth quarter 2016 rated their experience as excellent.

**Table 11: Island Experience Rated as Excellent – China and Korea  
(Percentage of Chinese/Korean Respondents by Island)**

Island	China				Korea			
	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2016	Q2 2016	Q3 2016	Q4 2016
O'ahu	80	72	79	78	80	82	73	78
Maui	88	59	85	79	82	82	73	80
Hawai'i Island	86	70	81	80	72	77	72	72

\* Ratings for Kaua'i were not reported due to small sample sizes.

In fourth quarter 2016, close to 80 percent of Chinese respondents gave excellent ratings to their visit to O'ahu, Maui and the island of Hawai'i.

Among Korean respondents, eight out of ten rated Maui and O'ahu excellent, while the island of Hawai'i received excellent ratings from 72 percent of the visitors.

## TRIP PLANNING

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. Respondents from Japan, China and Korea in fourth quarter 2016 have a relatively short time frame where much of the decisions to take a vacation and the process of booking their trip to Hawai'i occurred within three months before their arrivals. Visitors from U.S. West, U.S. East, Canada, Europe and Oceania planned much farther in advance.

**Table 12: Trip Decision Making - U.S. West**  
(Percent of U.S. West visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	4.3%	19.5%	11.7%	30.7%	29.4%	4.5%	N/A
Decide to visit Hawai'i	4.7%	18.9%	11.5%	30.2%	29.9%	4.8%	N/A
Decide which island to visit	3.4%	17.2%	12.1%	31.3%	31.6%	4.5%	12.2%
Travel dates	1.9%	13.0%	12.3%	30.5%	36.6%	5.7%	13.9%
Accommodations- where to stay	1.9%	11.5%	11.1%	30.0%	38.6%	6.9%	13.3%
Airline reservations	0.2%	4.9%	9.4%	32.7%	46.0%	6.7%	12.9%
Purchase airline tickets	0.0%	4.5%	9.1%	32.2%	47.1%	7.0%	13.1%
Accommodation- reservations	1.5%	10.5%	11.0%	29.2%	40.8%	7.1%	14.1%
Rental car reservations	0.0%	2.8%	5.9%	23.7%	56.7%	10.9%	16.3%
Purchase tour/ attraction package	0.0%	1.1%	2.4%	13.3%	62.1%	21.0%	51.7%

The majority of U.S. West respondents in the fourth quarter of 2016 made the decision to take a vacation (64.5%) and to choose Hawai'i as a vacation destination (64.9%) within six months before their trip. Actual reservations and ticket purchases took place closer to the date of travel. Half of the respondents made airline (52.8%) and accommodation (47.8%) reservations, while 67.5 percent made rental car reservations within 3 months before their trips to Hawai'i. Close to 60 percent purchased tour or attraction packages between one to three months out, but 21 percent waited until less than one month before arrival. Additionally, 51.7 percent purchased packaged tours during their trip.

**Table 13: Trip Decision Making - U.S. East**  
(Percent of U.S. East visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	6.5%	23.2%	13.2%	29.8%	23.8%	3.5%	N/A
Decide to visit Hawai'i	7.0%	20.9%	13.6%	30.2%	24.2%	4.1%	N/A
Decide which island to visit	4.8%	18.1%	13.6%	31.3%	27.9%	4.3%	12.9%
Travel dates	2.6%	15.1%	14.3%	32.0%	31.6%	4.5%	10.9%
Accommodations- where to stay	2.3%	13.1%	13.1%	30.8%	34.3%	6.4%	10.7%
Airline reservations	0.2%	5.7%	12.1%	33.5%	42.3%	6.2%	11.1%
Purchase airline tickets	0.1%	5.3%	11.6%	33.8%	43.1%	6.0%	10.9%
Accommodation- reservations	1.2%	10.9%	13.1%	30.7%	37.3%	6.7%	11.2%
Rental car reservations	0.1%	3.3%	7.9%	24.8%	53.6%	10.2%	16.0%
Purchase tour/ attraction package	0.2%	2.2%	3.4%	15.6%	62.3%	16.3%	62.0%



Over half of U.S. East visitors decided on a vacation (57.1%) and decided to visit Hawai'i (58.5%) within six months before arrival. Half of the respondents made their airline reservations (48.5%), purchased their airline tickets (49.2%) and made their lodging reservations (44%) within 3 months before their trip. The majority waited three months or less to make car reservations (63.8%) and purchase tour packages (78.6%). Six out of ten U.S. East respondents purchased packaged tours while their trip was in progress.

**Table 14: Trip Decision Making - Japan**  
(Percent of Japanese visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	1.5%	11.9%	7.1%	35.3%	39.8%	4.4%	N/A
Decide to visit Hawai'i	1.6%	12.0%	6.7%	34.1%	41.5%	4.0%	N/A
Decide which island to visit	1.3%	11.0%	6.5%	33.9%	43.2%	4.0%	11.1%
Travel dates	0.8%	8.5%	6.3%	31.3%	47.8%	5.3%	22.3%
Accommodations- where to stay	0.5%	5.4%	5.9%	30.4%	52.4%	5.3%	8.2%
Airline reservations	0.7%	6.6%	5.8%	30.2%	51.4%	5.3%	8.7%
Purchase airline tickets	0.6%	5.2%	5.7%	27.4%	55.0%	6.1%	6.8%
Accommodation- reservations	0.6%	6.4%	6.0%	29.1%	52.0%	5.9%	7.1%
Rental car reservations	0.7%	2.5%	2.6%	16.5%	60.3%	17.4%	7.4%
Purchase tour/ attraction package	0.5%	1.3%	1.5%	11.2%	69.2%	16.3%	37.4%

Japanese visitors in fourth quarter 2016 continued to have a relatively short planning and booking window. Three months or less before their arrival, 44.2 percent of the respondents decided to take a vacation, 45.5 percent decided to visit Hawai'i and 47.2 percent decided on the islands they wanted to visit. Within three months of their trip, over half of the respondents made airline reservations (56.8%), purchased airline tickets (61.1%), and made accommodation reservations (57.9%). Also within three months before arriving in Hawai'i, the majority of the respondents made rental car reservations (77.7%) and purchased tour and attraction packages (85.5%). Four out of ten respondents also purchased tour packages during their trip.

**Table 15: Trip Decision Making - Canada**  
(Percent of Canadian visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	5.3%	24.3%	11.1%	28.0%	26.5%	4.9%	N/A
Decide to visit Hawai'i	5.4%	22.7%	11.3%	27.1%	28.2%	5.2%	N/A
Decide which island to visit	4.1%	20.5%	11.7%	27.0%	31.0%	5.7%	11.0%
Travel dates	2.8%	17.1%	12.6%	29.1%	32.6%	5.8%	10.3%
Accommodations- where to stay	2.8%	15.2%	11.9%	26.8%	36.9%	6.4%	11.4%
Airline reservations	0.3%	8.1%	12.4%	31.0%	41.4%	6.8%	10.8%
Purchase airline tickets	0.3%	7.8%	12.1%	30.7%	42.2%	6.8%	10.5%
Accommodation- reservations	2.3%	14.0%	12.6%	26.8%	37.7%	6.6%	10.9%
Rental car reservations	0.1%	4.4%	6.7%	23.2%	55.6%	9.9%	18.7%
Purchase tour/ attraction package	0.5%	1.5%	2.9%	10.3%	63.8%	21.0%	59.4%

Similar to U.S. East visitors, over half of Canadian respondents in fourth quarter 2016 decided on a vacation (59.4%), decided to visit Hawai'i (60.6%) and decided on which islands to visit (63.6%) within six months prior to arrival. Half of the respondents purchased airline tickets (49%) and

reserved accommodations (44.3%) within three months before their trip. The majority made car reservations (65.6%) and purchased tour packages (84.8%) in the last three months before arriving. Six out of ten respondents purchased tour packages while their trip is in progress.

**Table 16: Trip Decision Making - Europe**  
(Percent of European visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	6.4%	24.3%	15.1%	30.8%	20.2%	3.2%	N/A
Decide to visit Hawai'i	6.9%	22.4%	16.1%	30.7%	21.1%	2.9%	N/A
Decide which island to visit	3.1%	18.8%	16.2%	31.8%	25.8%	4.3%	14.3%
Travel dates	3.2%	17.3%	17.1%	33.4%	25.2%	3.8%	11.1%
Accommodations- where to stay	2.1%	13.2%	14.5%	30.9%	33.9%	5.2%	14.7%
Airline reservations	0.7%	12.0%	16.1%	32.6%	33.1%	5.5%	11.5%
Purchase airline tickets	0.6%	11.7%	15.7%	32.2%	34.3%	5.5%	10.4%
Accommodation- reservations	1.1%	11.3%	14.7%	30.4%	36.9%	5.6%	11.2%
Rental car reservations	0.1%	5.1%	10.6%	23.7%	49.2%	11.2%	20.3%
Purchase tour/ attraction package	0.5%	3.9%	5.1%	25.8%	52.0%	12.8%	60.2%

Half of the European respondents took six months or less to decide to take a vacation (54.1%) and to pick Hawai'i as the destination (54.7%). Close to 40 percent of the respondents made their airline reservations (38.6%), purchased airlines tickets (39.8%) and made their lodging reservations (42.5%) within three months prior to arriving. The majority made car reservations (60.5%) and purchased tour packages (64.8%) within three months before their arrival date. Six out of ten respondents purchased tour and attraction packages during their trip.

**Table 17: Trip Decision Making - Oceania**  
(Percent of Oceania visitors for each response, Fourth Quarter 2016)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	7.3%	25.8%	16.1%	32.2%	17.4%	1.2%	N/A
Decide to visit Hawai'i	5.3%	23.3%	16.8%	34.7%	18.4%	1.5%	N/A
Decide which island to visit	3.2%	20.4%	16.7%	35.9%	21.6%	2.2%	12.7%
Travel dates	2.9%	20.5%	18.1%	36.1%	20.6%	1.8%	12.1%
Accommodations- where to stay	1.1%	11.1%	16.1%	36.2%	31.9%	3.6%	13.0%
Airline reservations	0.9%	14.2%	18.2%	39.2%	25.4%	2.2%	9.6%
Purchase airline tickets	0.6%	13.4%	17.8%	39.3%	26.5%	2.5%	9.6%
Accommodation- reservations	0.5%	9.5%	16.1%	36.8%	33.7%	3.5%	11.8%
Rental car reservations	0.3%	4.9%	6.9%	24.7%	53.8%	9.4%	19.7%
Purchase tour/ attraction package	0.5%	5.4%	9.4%	25.5%	45.0%	14.2%	66.1%

Half of the Oceania respondents decided to take a vacation (50.2%) and decided to visit Hawai'i (54.6%) within six months before arrival. Close to 40 percent respondents made airlines reservations (39.2%), purchased tickets (39.3%), made accommodation reservations (36.8%) between four to six months before their trip. The majority reserved rental cars (63.2%) and purchased tour/attraction packages (59.2%) within three months of arrival, and many also purchased tour and attraction packages (66.1%) during their trip.

**Table 18: Trip Decision Making - China**  
**(Percent of Chinese visitors for each response, Fourth Quarter 2016)**

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	0.0%	2.6%	4.3%	30.5%	49.4%	13.2%	N/A
Decide to visit Hawai'i	0.7%	3.7%	3.7%	25.9%	57.1%	8.8%	N/A
Decide which island to visit	0.7%	1.4%	3.3%	25.2%	58.4%	10.9%	N/A
Travel dates	0.0%	2.7%	4.4%	30.9%	55.7%	6.3%	N/A
Accommodations- where to stay	0.0%	0.9%	1.1%	19.0%	63.7%	15.3%	10.4%
Airline reservations	0.0%	1.7%	1.7%	16.3%	66.0%	14.4%	13.8%
Purchase airline tickets	0.0%	2.1%	2.1%	17.2%	60.8%	17.9%	10.0%
Accommodation- reservations	0.0%	0.0%	1.1%	15.1%	65.1%	18.7%	9.2%
Rental car reservations	0.0%	0.0%	0.0%	9.0%	62.4%	28.6%	8.6%
Purchase tour/ attraction package	0.0%	0.0%	0.0%	5.6%	63.8%	30.7%	15.0%

Many Chinese respondents in fourth quarter 2016 made their travel decisions in a relatively short time. Between one to three months prior to arrival, over half of the respondents decided to visit Hawai'i (57.1%), decided on the islands they wanted to visit (58.4%) and set their travel dates (55.7%). The majority also made airline reservations, purchased airline tickets, made accommodation reservations, made rental car reservations, and purchased tour and attraction packages between one to three months before their trip.

**Table 19: Trip Decision Making - Korea**  
**(Percent of Korean visitors for each response, Fourth Quarter 2016)**

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	0.0%	3.7%	4.7%	25.5%	47.1%	18.9%	N/A
Decide to visit Hawai'i	0.4%	4.4%	3.2%	25.6%	48.7%	17.7%	N/A
Decide which island to visit	0.0%	3.5%	5.2%	20.4%	49.5%	21.4%	30.6%
Travel dates	0.0%	4.0%	5.4%	24.3%	48.5%	17.8%	35.9%
Accommodations- where to stay	0.0%	1.5%	4.2%	18.7%	53.1%	22.5%	12.9%
Airline reservations	0.0%	2.9%	5.1%	27.2%	46.4%	18.4%	30.2%
Purchase airline tickets	0.0%	3.2%	5.8%	26.7%	48.6%	15.7%	32.1%
Accommodation- reservations	0.0%	1.4%	3.0%	18.0%	56.7%	21.0%	28.1%
Rental car reservations	0.0%	0.4%	2.1%	6.8%	53.2%	37.4%	23.1%
Purchase tour/ attraction package	0.0%	1.0%	2.5%	9.0%	48.1%	39.4%	31.8%

Half of the Korean respondents in fourth quarter 2016 decided to visit Hawai'i (48.7%), decided on the islands they wanted to visit (49.5%) and set a travel date (48.5%) within one to three months before their arrival. During this period, half of the respondents also made accommodation reservations, made rental car reservations and purchased tour and attraction packages.

A third of the respondents decided to visit multiple islands, and made their airlines reservations, purchased airline tickets, and made accommodation reservations during their trip.

## Sources of Information used for Trip Planning

Visitors to Hawai'i used a variety of resources to plan their trip to the islands. This section shows the sources of information used by respondents who came in fourth quarter 2016.

**U.S. West:** While planning their trip to Hawai'i, U.S. West respondents in fourth quarter 2016 relied heavily on their personal experience (63%) and recommendations from friends/relatives (49%). Other sources used were information from airlines (39%), smartphone/tablet (36%), online travel booking site (33%) and online webpage/blog about Hawai'i (30%).

While their trip is in progress, U.S. West visitors used their personal experience (46%), smartphone/tablet (37%), and information from hotel/resort (33%).

**U.S. East:** Half of the U.S. East respondents in fourth quarter 2016 relied on recommendations from friends/relatives (53%) and their personal experience (49%) in planning their trip. A third of these visitors used online webpage/blog about Hawai'i (36%), information from airlines (35%), smartphone/tablet (33%), online social networking site (31%), and online travel booking site (31%).

During their trip, many U.S. East respondents used information from hotels/resorts (43%) and smartphone/tablet (40%) to find information about Hawai'i.

**Japan:** Japanese respondents in fourth quarter 2016 relied heavily on travel agents (60%) in planning their trip. Magazines (44%), online webpage/blog about Hawai'i (41%), recommendations from friends/relatives (38%), smartphone/tablet (36%), personal experience (36%), guide books (31%) and online travel booking sites (31%) were other resources used.

While their trip was in progress, Japanese respondents sought help from hotels/resorts front desks/tour desks (23%), and used smartphone/tablet (20%) and magazines (20%) to access information about Hawai'i.

**Canada:** Half of the Canadian respondents who visited Hawai'i in fourth quarter 2016 relied on their personal experience (58%) and recommendations from friends/relatives (50%) in planning their trip. Many respondents also used online travel booking sites (39%), online webpage/blog about Hawai'i (39%), information from airlines (35%), online social networking sites (34%) and smartphone/tablet (34%).

During their trip, many Canadian respondents relied on their personal experience (38%) and used smartphone/tablet (35%), information from hotels/resorts (33%) and guide books (33%).

**Europe:** While planning their trip to the islands, many European respondents in fourth quarter 2016 used recommendations from friends/relatives (44%), online travel booking sites (42%), online webpage/blog about Hawai'i (41%), travel agents (41%) and guide books (41%).

While their trip is in progress, many European respondents used information from hotels/resorts (37%), guide books (37%) and smartphone/tablet (34%).

**Table 20: Resources Used in Planning their Trip to Hawai'i – Fourth Quarter 2016  
(Percentage of Respondents who used these Information)**

		MMA							
		U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Travel agents/ Companies specializing in packaged tours	Before	18%	29%	60%	17%	41%	62%	52%	50%
	During	6%	12%	14%	8%	12%	13%	26%	16%
	After	2%	2%	3%	1%	2%	2%	6%	2%
	Not used	77%	65%	36%	77%	50%	34%	44%	40%
Information from airline/ commercial carriers	Before	39%	35%	22%	35%	34%	30%	17%	38%
	During	10%	13%	6%	11%	15%	11%	5%	4%
	After	2%	2%	2%	2%	2%	2%	2%	1%
	Not used	57%	61%	75%	62%	59%	63%	80%	58%
Hotel/Resort- front desk, concierge/ tour desk	Before	17%	18%	22%	14%	18%	14%	15%	35%
	During	33%	43%	23%	33%	37%	45%	10%	16%
	After	1%	1%	1%	1%	3%	1%	1%	0%
	Not used	55%	47%	60%	57%	50%	43%	77%	53%
Personal experience	Before	63%	49%	36%	58%	33%	39%	43%	31%
	During	46%	37%	12%	38%	28%	27%	33%	11%
	After	16%	14%	3%	13%	10%	11%	4%	3%
	Not used	29%	41%	60%	34%	53%	51%	52%	63%
Recommendations from Friends or relatives	Before	49%	53%	38%	50%	44%	50%	31%	43%
	During	22%	26%	10%	20%	20%	15%	12%	8%
	After	6%	4%	2%	3%	6%	2%	3%	2%
	Not used	45%	41%	59%	46%	49%	46%	65%	51%
Online travel booking site/ Online travel agent	Before	33%	31%	31%	39%	42%	41%	23%	34%
	During	5%	7%	4%	8%	11%	9%	7%	8%
	After	1%	2%	1%	2%	2%	1%	1%	0%
	Not used	66%	66%	67%	59%	55%	57%	74%	62%
Online webpage or blog covering Hawai'i	Before	30%	36%	41%	39%	41%	36%	18%	48%
	During	15%	21%	14%	23%	24%	15%	7%	29%
	After	3%	3%	7%	4%	6%	2%	3%	4%
	Not used	65%	59%	55%	55%	52%	59%	79%	44%
Online social networking site	Before	24%	31%	29%	34%	35%	33%	24%	54%
	During	16%	20%	13%	24%	24%	22%	7%	32%
	After	6%	7%	3%	5%	6%	6%	4%	5%
	Not used	70%	63%	66%	60%	56%	59%	73%	35%
Smartphone or tablet applications relevant to your trip	Before	36%	33%	36%	34%	31%	32%	21%	40%
	During	37%	40%	20%	35%	34%	33%	13%	24%
	After	6%	6%	5%	6%	5%	5%	3%	2%
	Not used	51%	50%	57%	54%	53%	53%	74%	45%
Hawai'i Visitors Bureaus website	Before	19%	27%	19%	25%	26%	24%	13%	15%
	During	7%	11%	3%	12%	16%	11%	5%	4%
	After	1%	2%	2%	3%	5%	3%	2%	2%
	Not used	78%	69%	79%	69%	66%	69%	83%	81%
Magazines	Before	11%	14%	44%	10%	14%	10%	8%	13%
	During	12%	13%	20%	16%	18%	12%	4%	5%
	After	2%	2%	3%	2%	3%	1%	1%	2%
	Not used	80%	78%	51%	77%	72%	81%	89%	81%
Television shopping channel/ television program	Before	4%	4%	31%	3%	5%	3%	3%	13%
	During	5%	6%	12%	6%	6%	7%	2%	2%
	After	1%	1%	6%	1%	2%	1%	1%	1%
	Not used	92%	90%	65%	91%	89%	90%	94%	84%
Guide books	Before	24%	28%	31%	27%	41%	20%	9%	31%
	During	25%	29%	14%	33%	37%	18%	6%	19%
	After	2%	2%	3%	3%	6%	2%	0%	3%
	Not used	65%	59%	64%	57%	47%	68%	87%	59%

**Oceania:** Respondents from Oceania primarily used travel agents (62%) in planning their trip to Hawai'i. Many also used recommendations from friends/relatives (50%), personal experience (39%), online travel booking sites (41%), online webpage/blog about Hawai'i (36%), online social networking sites (33%) and smartphone/tablet (32%).

During their trip, some visitors received information from hotels/resorts (45%) and used smart phones and tablets (33%).

**China:** Over half of the Chinese respondents in fourth quarter 2016 used travel agents (52%) in planning their trip to Hawai'i. Some used their personal experience (43%), recommendations from friends/relatives (31%), online social networking sites (24%), online travel booking sites (23%) and smartphone/tablet (21%).

During their trip, some respondents continued to rely on travel agents (26%) for information about Hawai'i.

**Korea:** Over half of the Korean respondents in fourth quarter 2016 used online social networking sites (54%) in their trip planning. Travel agents (50%), online webpage/blog about Hawai'i (48%), recommendations from friends/relatives (43%) and smartphone/tablet (40%) were other popular resources.

While their trip was in progress, Korean respondents used online social networking sites (32%), online webpage/blog about Hawai'i (29%) and smartphone/tablet (24%).

## SURVEY METHODS

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai'i. Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases.

Quarterly data are reported for visitors from eight visitor groups: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other States in the Continental U.S.), Japan, Canada, Europe, Oceania, China and Korea.

**Table 21: Number of Surveys Collected  
(Fourth Quarter 2016)**

MMA	Completed	Margin of Error
U.S West	1,090	2.97
U.S East	1,007	3.09
Canada	1,184	2.85
Japan	921	3.23
Europe	516	4.31
Oceania	390	4.96
Other Asia (China & Korea)	601	4.00
All MMAs	5,709	1.30

Selected U.S., Japanese, Canadian, European and Oceania visitors were mailed a survey form or were contacted by email to complete the survey on-line. Beginning in January 2016, data for Chinese and Korean visitors were collected via intercept surveys at the Honolulu International Airport using iPad tablets. In the fourth quarter (October – December) of 2016, a total of 5,709 completed forms were received with a margin of error of  $\pm 1.30$  percentage points at the 95 percent confidence level.

Data collected from the online survey and from the iPad intercept surveys were merged with mailed survey data to form a single database for analysis. Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Results are presented only for classifications (MMA, islands visited, ports of entry, types of visitors, etc.) for which sample sizes are large enough to produce statistics with sample error estimates less than 10 points. Data from all MMAs were reported as weighted data based on weights generated for 2016 data. The 2016 VSAT weighting system was developed to adjust for disproportionate sampling across MMAs.

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