

2017
VISITOR SATISFACTION
AND ACTIVITY REPORT



Hawai'i Convention Center
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815
(808) 973-2255
www.HawaiiTourismAuthority.org

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ABOUT THIS REPORT

The 2017 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. 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 recent trip to Hawai'i.

Selected U.S. West, U.S. East, Japanese, Canadian, European and Oceania visitors 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 Daniel K. Inouye International Airport using iPad tablets.

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. 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.

This report and the companion Excel workbook of 2017 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: Jennifer Chun, Minh-Chau T. Chun, Joseph Patoskie and Lawrence Liu.

¹ Hawai'i Tourism Authority, Annual Research Report, 2015, pp. 182-185.

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 eight visitor markets:

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
7. China
8. Korea

Visitor Lifestyle and Life stage: 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 life stage
- ❖ Young: Visitors between 18 and 34 years of age and who are not in the above life stages
- ❖ Middle Age: Visitors between 35 and 54 years of age and not in the above life stages
- ❖ Seniors: Visitors 55 years of age or over and not in the above life stages

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

OVERVIEW OF VISITOR INDUSTRY

Hawai'i's tourism industry achieved new records in total visitor spending and visitor arrivals in 2017, marking the sixth consecutive year of record growth in both categories. Total spending by visitors to the Hawaiian Islands gained 5.6 percent to a new high of \$16.81 billion. A total of 9,404,346 visitors came by air service or by cruise ships to the state, an increase of 5.3 percent from the previous record of 8,934,277 visitors in 2016. Total visitor days rose 4.8 percent compared to last year. The average spending per day by these visitors (\$198 per person) was slightly higher than 2016 (\$197 per person).

Arrivals by air to O'ahu rose 4.5 percent to 5,690,752 visitors in 2017. There were 2,744,994 visitors who came by air to Maui, up 4.2 percent from 2016. Arrivals to Moloka'i of 58,450 were slightly lower (-0.8%) compared to 2016. There was a 2.1 percent growth in arrivals to Lāna'i (to 64,357 visitors). Arrivals to the island of Hawai'i increased 13.6 percent to 1,761,489 visitors while arrivals to Kaua'i grew 7.8 percent to 1,279,968 visitors.

For a complete analysis of Hawai'i's visitor industry, please refer to the "2017 Annual Visitor Research Report (pdf)" posted on the HTA website at:

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

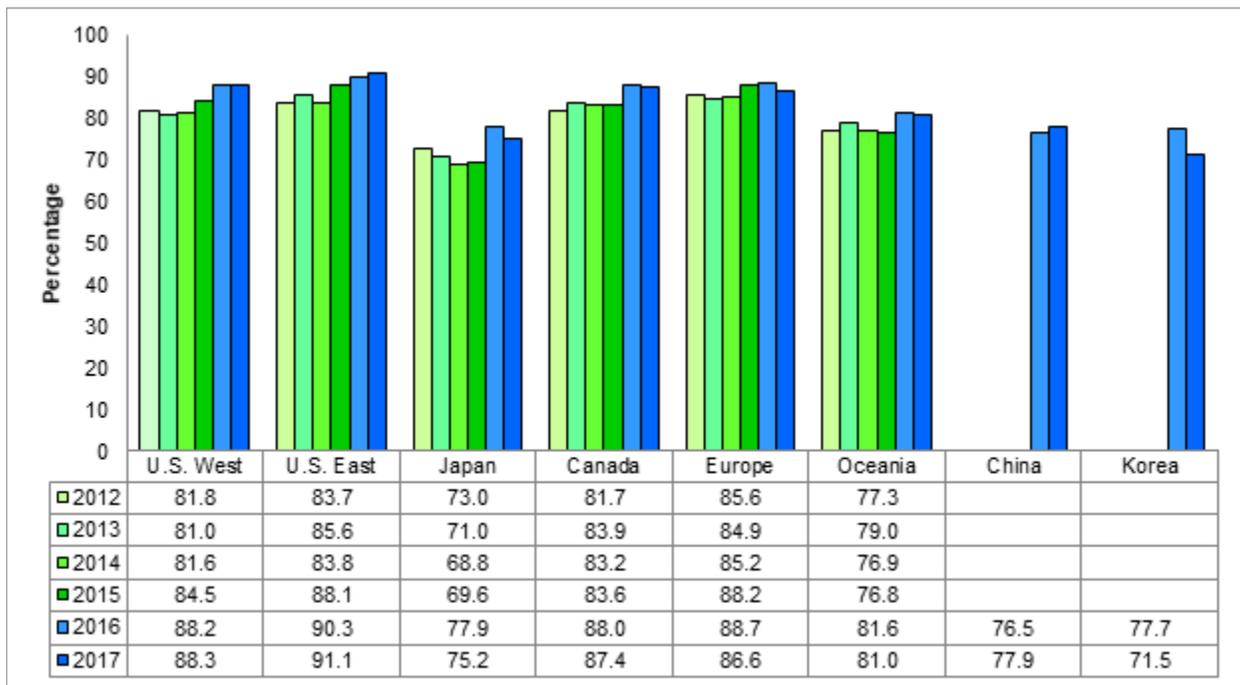
VISITOR SATISFACTION

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 2017 annual VSAT data tables posted on the HTA website).

OVERALL RATING OF MOST RECENT VACATION TO HAWAI'I

Figure 1 shows the percent of respondents who rated their trip as "excellent" (7 or 8, on an eight-point scale). The majority of visitors in 2017 gave high marks for their overall experience in Hawai'i.

Figure 1. Overall Rating of Trip
(Percentage of Visitors Who Rated their Most Recent Trip "Excellent" by MMA)²



- "Excellent" ratings by Korean respondents decreased (-6.3 points to 71.5%) compared to 2016.
- Ratings by U.S. West, U.S. East, Japanese, Canadian, European, Oceania, and Chinese respondents in 2017 were similar to the previous year.

² Percentage of respondents who rated their most recent trip a 7 or 8 where 1 = poor and 8 = excellent.

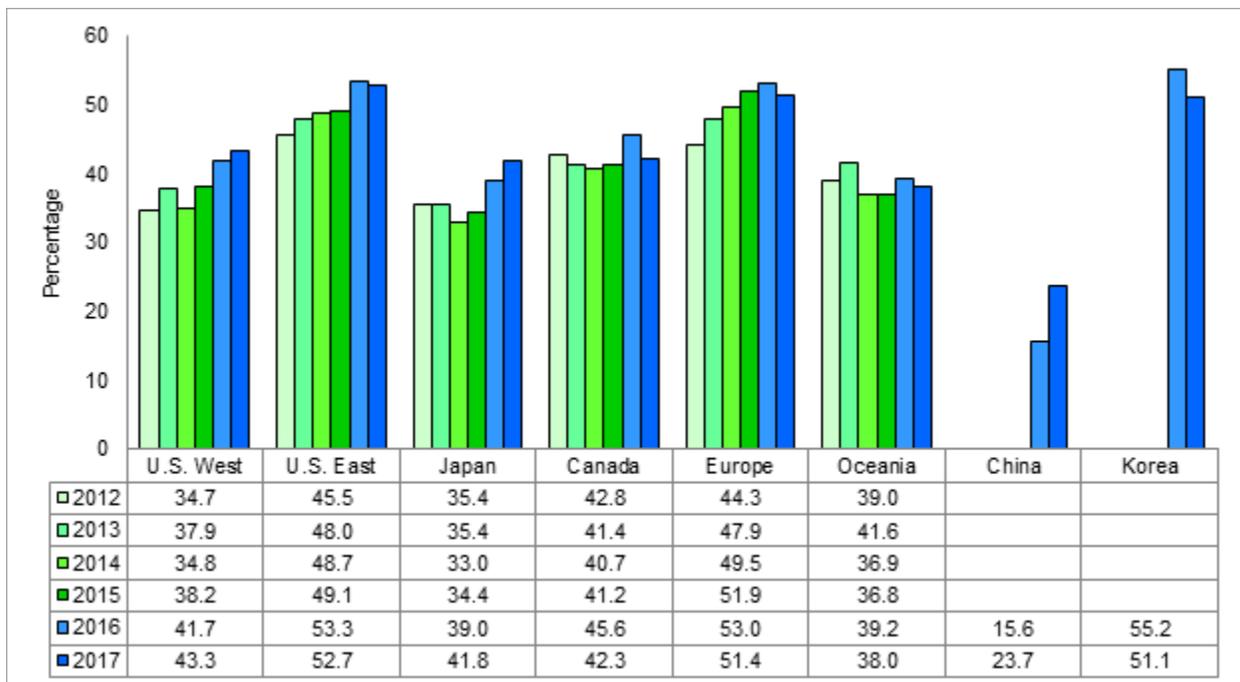
MEETING VISITOR EXPECTATIONS

Visitors' evaluation of their trip is influenced not only by the nature of the service they receive, but also by their needs, interests and expectations. Visitors were asked if their Hawai'i trip "exceeded" "met" or "did not meet" expectations.

In 2017, ratings of "exceeded" expectations by visitors from most markets increased compared to 2016.

Very few respondents from U.S. West (2.5%), U.S. East (2.1%), Japan (2.3%), Canada (2.7%), Europe (2.8%), Oceania (4.7%), China (4.7%), and Korea (6.7%) said that Hawai'i "did not meet" their expectations.

**Figure 2. Trip Exceeded Expectations
(Percentage of Visitors Who Said this Trip "Exceeded" Expectations by MMA)**



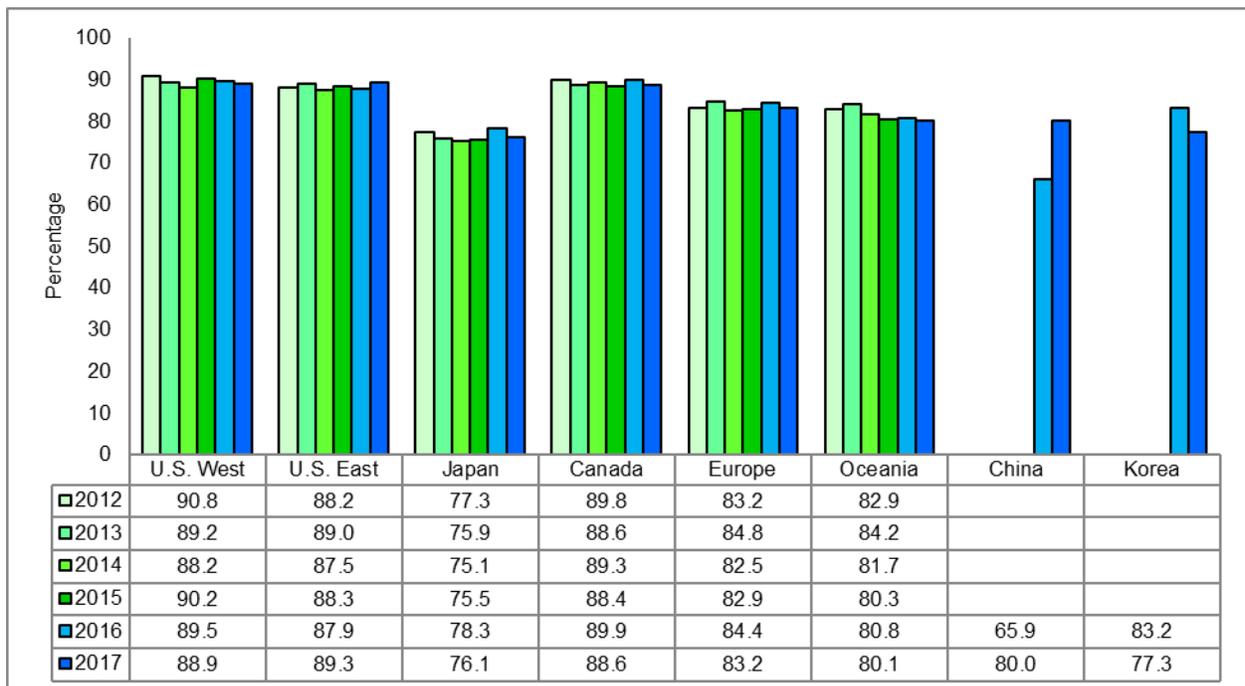
- A higher percentage of Japanese (+2.9 points) respondents felt their trip "exceeded" their expectations compared to 2016.
- Ratings by Korean (-4.1 points) and Canadian (-3.4 points) respondents were down from 2016.
- While Chinese visitors were more critical about Hawai'i than other visitor groups, their ratings improved (+8.1 points) compared to 2016. A quarter of Chinese respondents in 2017 felt that Hawai'i "exceeded" their expectations and 77.7 percent said the trip "met" their expectations.

LIKELIHOOD TO RECOMMEND HAWAI‘I

Highly satisfied visitors are more likely to recommend their vacation destination to their friends and family. Visitors were asked if they were “very likely”, “somewhat likely”, “not too likely”, or “not at all likely” recommend Hawai‘i as a vacation place to friends and relatives.

In 2017, only a small percentage of Korean (4.7%), Oceania (3.4%), European (2.4%), Chinese (1.9%), Japanese (1.7%), Canadian (1.7%), U.S. West (1.5%) and U.S. East (1.5%) respondents said that they would “not too likely” or “not at all likely” recommend Hawai‘i. The majority of visitors continued to respond that they would “very likely” recommend Hawai‘i to others.

**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)**

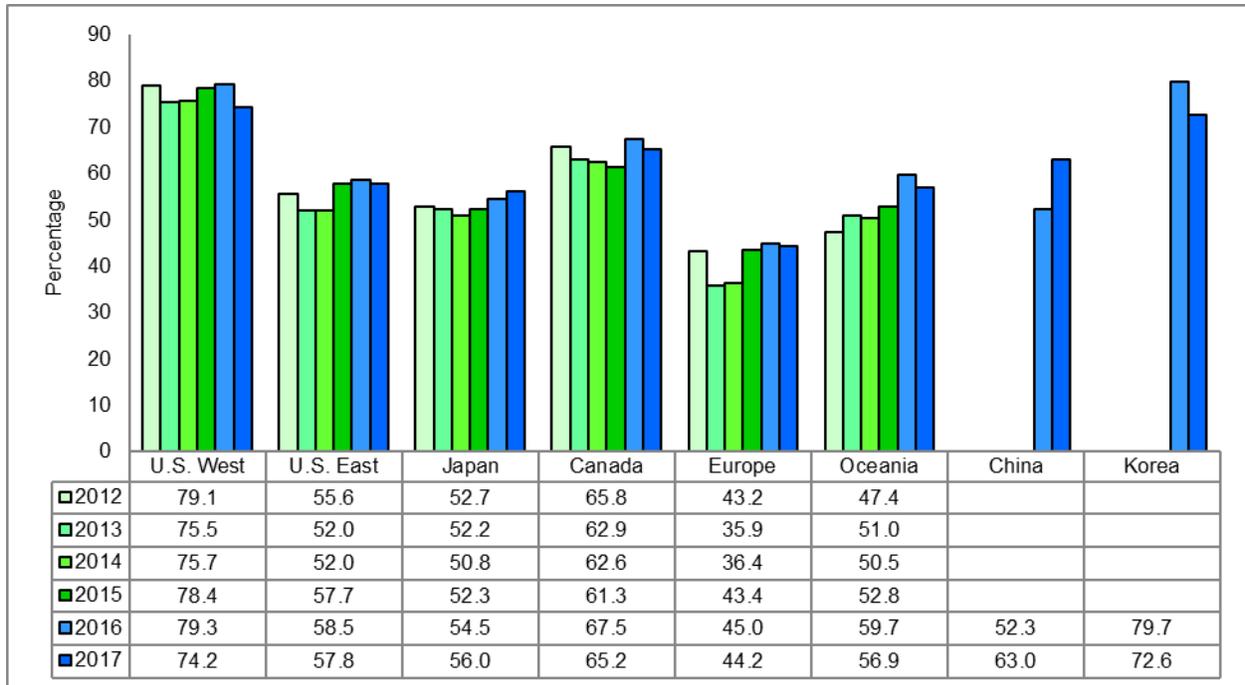


- Nine out of ten U.S. West, U.S. East and Canadian respondents in 2017 would “very likely” recommend Hawai‘i to friends and relatives. These ratings remained relatively consistent with scores from the prior six years.
- Slightly more than 80 percent of respondents from Europe and Oceania would “very likely” recommend Hawai‘i in 2017. Their ratings were similar to 2016.
- Japanese visitors’ ratings as to “very likely” recommending Hawai‘i to others for vacation hovered near 80 percent in 2016. Ratings in 2017 dropped slightly (-2.2 points) to 76.1 percent.
- For Korean respondents, ratings in the “very likely” to recommend category declined (-5.9 points to 77.3%) compared to 2016.
- Eight out of ten Chinese respondents reported that they would “very likely” recommend Hawai‘i to their friends and relatives, up 14.1 points over 2016.

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 trip, a desire for new experiences, amount of time available, financial considerations, airline access, and 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)**

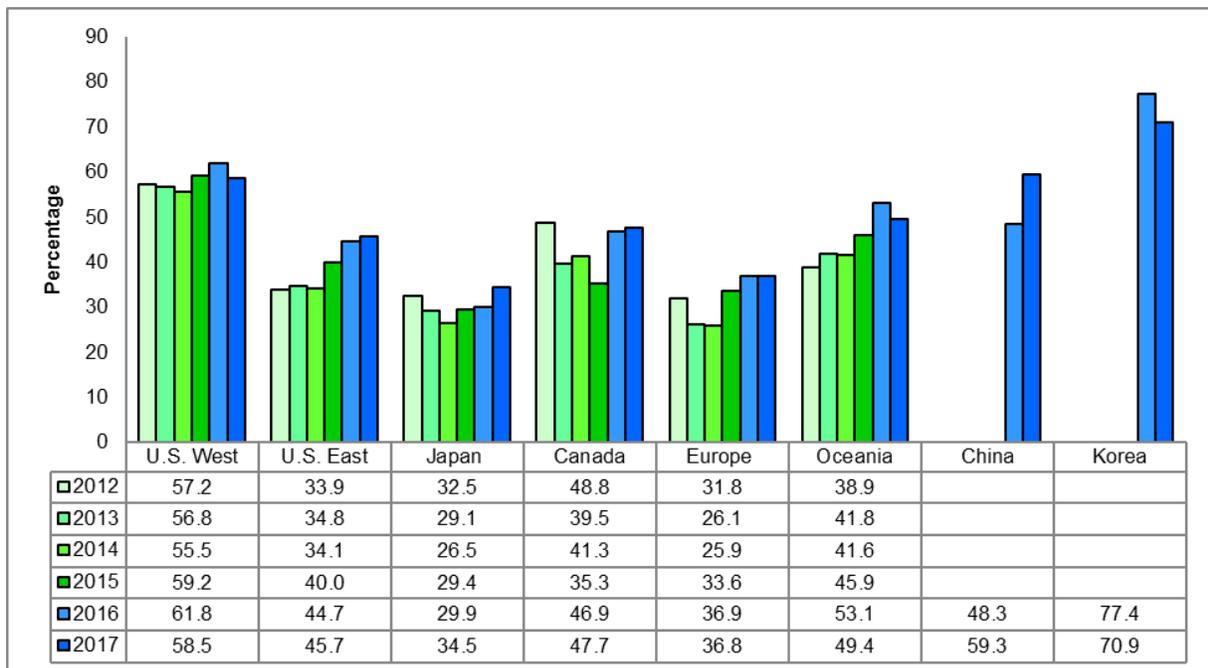


- U.S. West respondents' "very likely" rating on their willingness to revisit Hawai'i ranged between 75 to 80 percent between 2012 and 2016. However in 2017, ratings decreased 5.1 points to 74.2 percent.
- Among Korean respondents, ratings of "very likely" to return to Hawai'i in the next five years also declined (-7.1 points) between 2016 to 2017.
- With the long distance and no direct flights to Hawai'i, European visitors continued to show the lowest percentage among all regions in the "very likely" to return to Hawaii within five years category (44.2%). Ratings in 2017 were similar to 2016.
- Six out of ten Chinese respondents in 2017 said that they would "very likely" revisit Hawai'i in the next five years, a 10.7-point improvement over 2016.

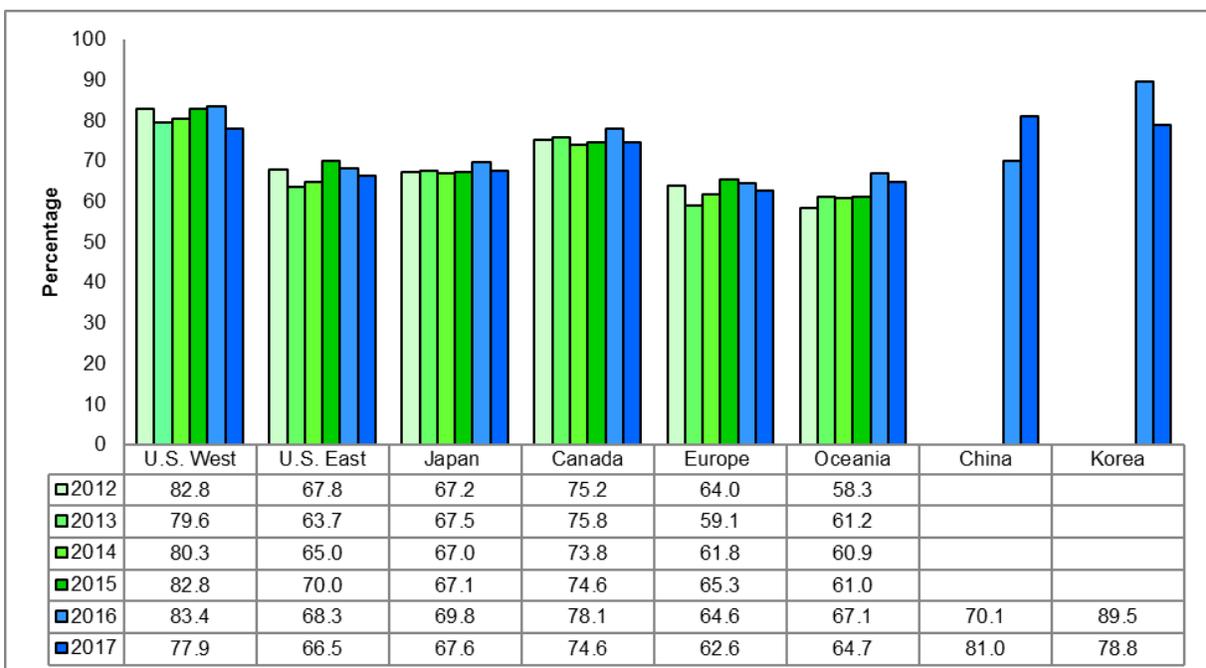
FIRST-TIME / REPEAT VISITORS

Likelihood to revisit is also highly correlated with visitor status (i.e., first-time versus repeat). Percentages of first-time and repeat visitors varied across visitor markets. Figure 5 presents VSAT measures for the likelihood of returning to Hawai'i in the next five years 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)**

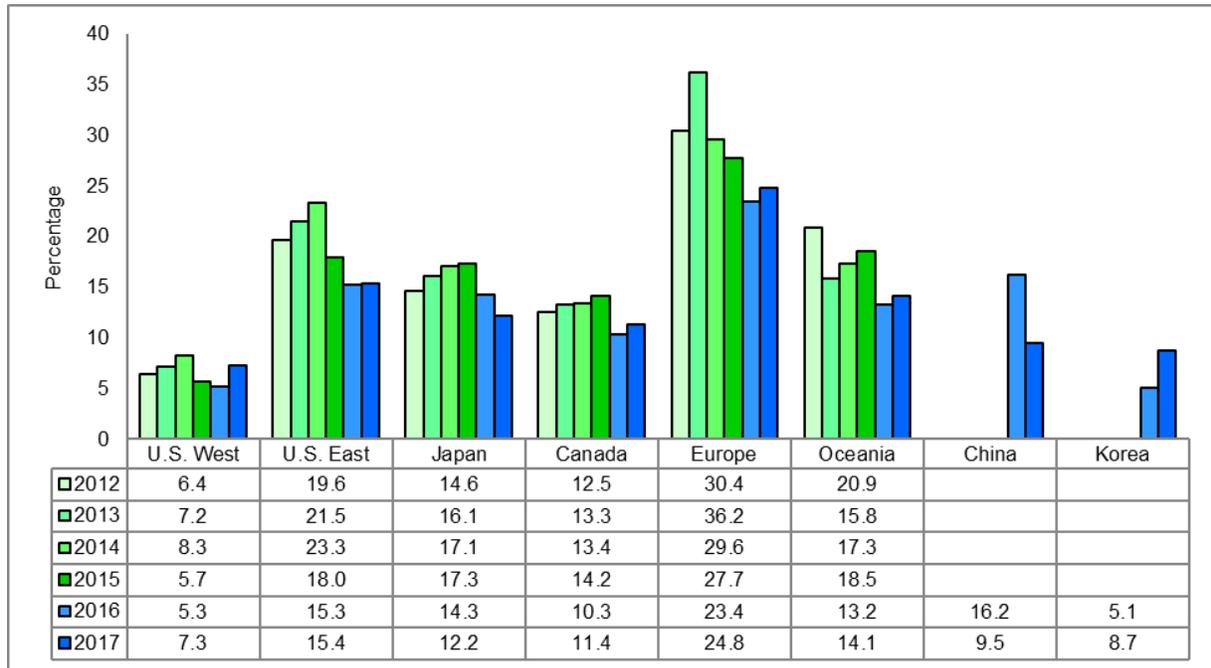


- Among U.S. West respondents in 2017, 58.5 percent of first-time visitors said that they would “very likely” return to Hawai‘i, down 3.3 points from 2016. Ratings by repeat visitors were also lower (-5.5 points to 77.9%) compared to 2016.
- For U.S. East respondents, 45.7 percent of first-time visitors said they would “very likely” return within five years, similar to 2016. However, a slightly lower percentage of repeat visitors (-1.8 points to 66.5%) said that they would “very likely” revisit.
- Among Japanese respondents, there was an increase in the percentage of first-time visitors who said they would “very likely” return (+4.6 points to 34.5%), while “very likely” to return ratings from repeat visitors declined (-2.2 points to 67.6%) from 2016.
- For Canadian respondents, 47.7 percent of first-time visitors in 2017 said they would “very likely” revisit, similar to 2016. A lower percentage of repeat visitors (-3.5 points to 74.6%) said that they would “very likely” return compared to 2016.
- For European Respondents, 36.8% of first-time visitors reported in 2017 that they would “very likely” return to Hawai‘i within five years whereas 62.6% of repeat visitors were “very likely” to return, similar to 2016.
- For Respondents from Oceania, a lower percentage of first-time visitors (-3.7 points to 49.4%) said they would “very likely” return in the next five years. Ratings by repeat visitors (64.7%) were similar to 2016.
- Among Chinese respondents, a higher percentage of first-time visitors (+11 points to 59.3%) and repeat visitors (+10.9 points to 81.0%) said that they would “very likely” come back to Hawai‘i within five years.
- First-time Korean visitors reported that they would “very likely” return to Hawai‘i within five years (-6.5 points to 70.9%) while the response of “very likely” for repeat visitors was lower (-10.7 points to 78.8%) compared to 2016.

NOT LIKELY TO REVISIT HAWAI'I

While measuring the degree to which visitors will return to Hawai'i provides a perspective on visitor retention, it is equally important to assess their desire not to return and reasons for this sentiment.

Figure 7. Visitors Not Likely to Revisit Hawai'i
(Percentage of Visitors reporting "Not too likely" or "Not at all likely" to revisit Hawai'i in the Next Five Years, by MMA)



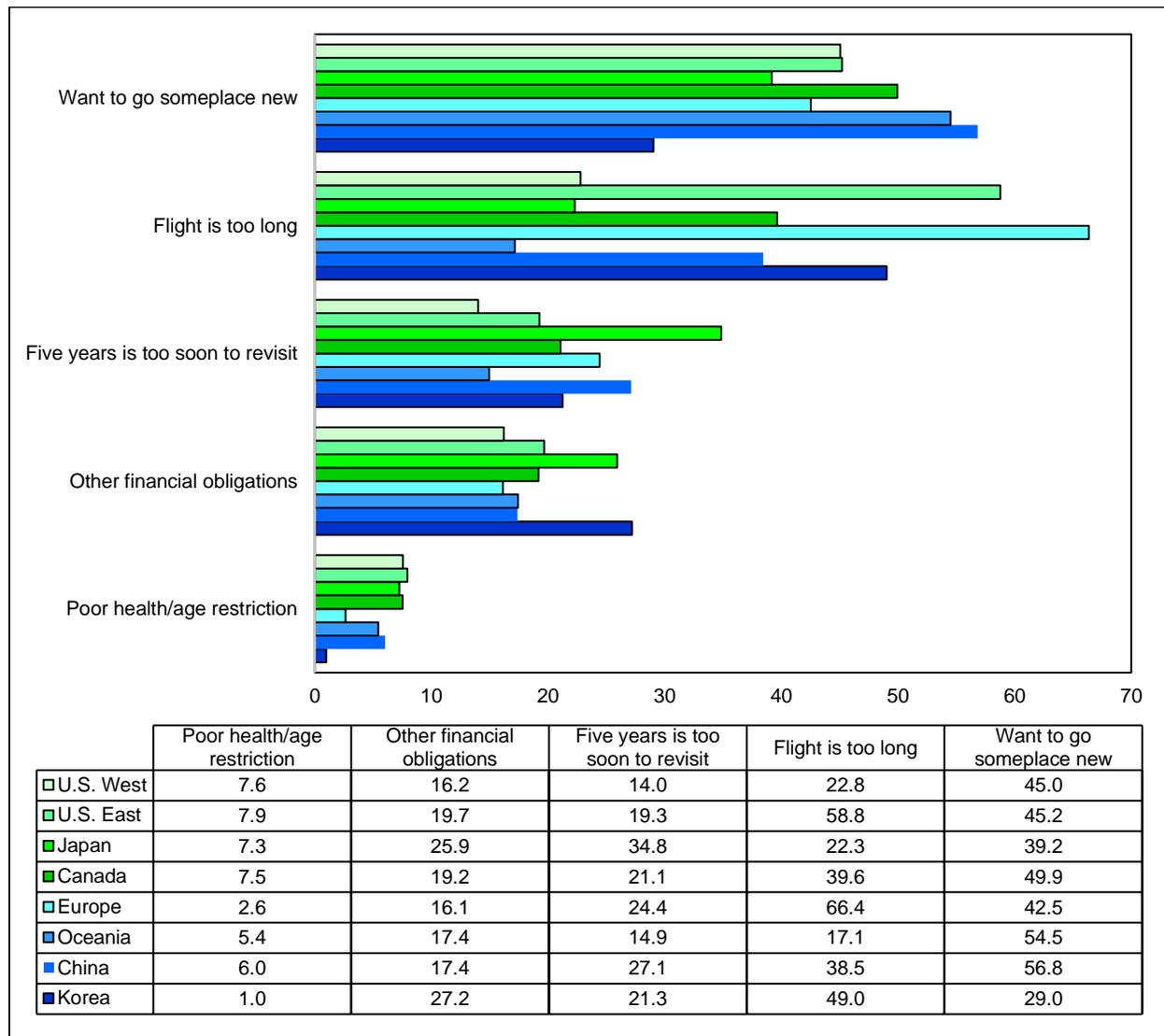
The responses of visitors who would not likely return to Hawai'i are shown in Figure 7. The measure consists of the percentage of visitors who stated that they were either "not too likely" or "not at all likely" to visit Hawai'i. Of note:

- For Chinese respondents in 2017, the percentage of visitors "not too likely" and "not at all likely" to return declined by 6.7 points to 9.5 percent reflecting improvement over 2016.
- Ratings by respondents from U.S. West, U.S. East, Japan, Canada, Europe, Oceania and Korea were similar to 2016.

Reasons for Not Revisiting Hawai‘i

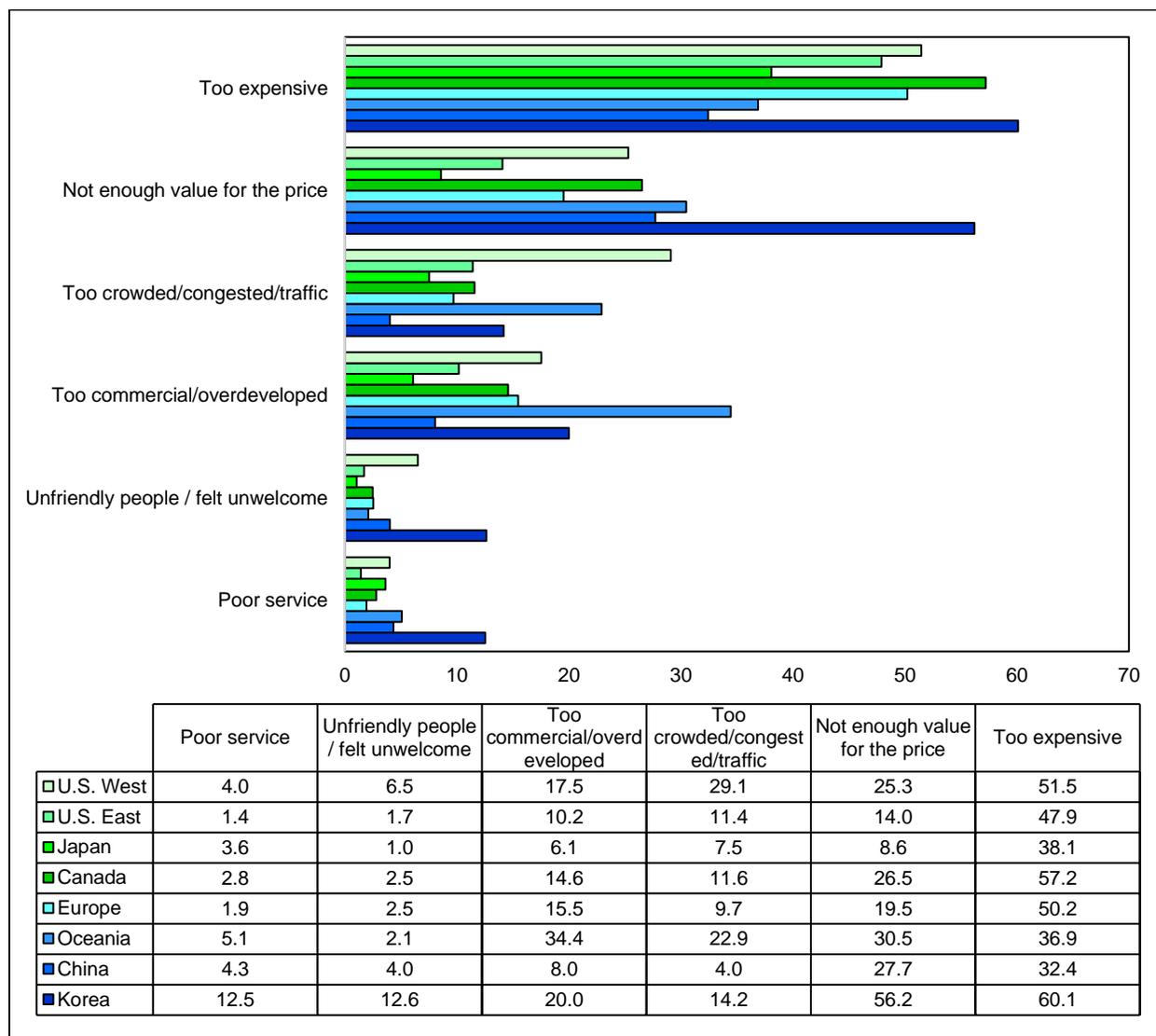
Respondents who reported that they that they would “not too likely” or “not at all likely” return to Hawai‘i were asked to give the reason(s). A list of 11 reasons were offered in the survey and respondents could check all that applied. Five of the items (outlined in Figure 8) are considered “barriers” to returning, representing conditions of the marketplace or characteristics of the traveler.

Figure 8. Reasons for Not Returning by MMA – “Barriers”
(Percentage of 2017 Visitors Not Likely to Revisit Hawai‘i in the Next Five Years)



The remaining six items (shown 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 more of 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. A breakout of the responses by market (with gain/loss of percentage points between 2016 and 2017) is provided below.

**Figure 9. Reasons for Not Returning by MMA – “Performance Issues”
(Percentage of 2016 Visitors Not Likely to Revisit Hawai‘i in the Next Five Years)**



U.S. West: The “desire to go someplace new” (+4.4 points to 45.0%) continued to be the primary barrier to revisiting Hawai‘i among U.S. West respondents in 2017. Some respondents cited the “long flight” (+1.6 points to 22.8%) and “other financial obligations” (-1.0 points to 16.2%) as barriers to returning.

Hawai‘i being “too expensive” (-4.7 points to 51.5%) was an issue for over half of the respondents. A quarter of the respondents said that Hawai‘i was “too crowded/congested” (+1.8 points to 29.1%) or that there was “not enough value for the price” (-7.0 points to 25.3%).

U.S. East: The “long flight” (+10.7 points to 58.8%) and the “desire to go someplace new” (-0.9 points to 45.2%) were the top two barriers cited by U.S. East visitors.

Hawai'i being “too expensive” (-3.8 points to 47.9%) continued to be the primary performance issue affecting U.S. East visitors' likelihood to return. Other reasons included Hawai'i “not being enough value for the price” (-2.3 points to 14.0%) as well as being “too crowded/congested” (-6.4 points to 11.4%).

Japan: Japanese respondents in 2017 continued to cite more barriers than performance-related issues as reasons for not returning. Close to 40 percent of the respondents cited the “desire to visit someplace new” (+2.8 points to 39.2%). Other barriers cited included “five years is too soon to revisit” (-10.2 points to 34.8%), “other financial obligations” (+9.5 points to 25.9%), and the “long flight” (unchanged, 22.3%).

Hawai'i being “too expensive” (+12.8 points to 38.1 points) remained the primary performance issue for Japanese respondents. However, only 8.6 percent (+1.5 points) said there was “not enough value for the price” they paid.

Canada: The “desire to visit someplace new” (-1.5 points to 49.9%) continued to be the main barrier to revisiting Hawai'i among Canadian visitors. Other reasons provided were the “long flight” (+4.8 points to 39.6%) and “five years is too soon to revisit” (-1.4 points to 21.1%).

The primary performance-related issue was Hawai'i being “too expensive” (+1.9 points to 57.2%). Some respondents also felt that there was “not enough value for the price” (-0.9 points to 26.5%).

Europe: The “long flight” (-1.1 points to 66.4%) continued to be the primary barrier for European visitors wanting to return to Hawai'i. Other reasons provided were the “desire to go someplace new” (-7.7 points to 42.5%), and “five years is too soon to revisit” (+2.1 points to 24.4%).

Half of the respondents in 2017 said they would not revisit because Hawai'i was “too expensive” (-3.3 points to 50.2%). Some European respondents said that there was “not enough value for the price” (+2.0 points to 19.5%) and that Hawai'i was “too commercialized/overdeveloped” (+1.8 points to 15.5%).

Oceania: Among this group of respondents, the most cited barrier for revisiting continued to be the “desire to go someplace new” (-0.1 points to 54.5%). Other barriers that were cited include: “other financial obligations” (+1.0 points to 17.4%), the “long flight” (-2.0 points to 17.1%), and “five years is too soon to revisit” (-4.8 points to 14.9%).

The top three performance-related issues for Oceania respondents were: Hawai'i being “too expensive” (-2.9 points to 36.9%), it being “too commercialized/overdeveloped” (-6.4 points to 34.4%), and there being “not enough value for the price” (-5.9 points to 30.5%).

China: Among Chinese respondents in 2017, the “desire to go someplace new” (+9.5 points to 56.8%) was the main barrier to revisiting Hawai'i. The “long flight” (+17.7 points to 38.5%) and “five years is too soon to revisit” (+6.9 points to 27.1%) were other reasons provided. A third of the respondents said Hawai'i was “too expensive” (+21.6 points to 32.4%) and that there was “not enough value for the price” they paid (+12.2 points to 27.7%).

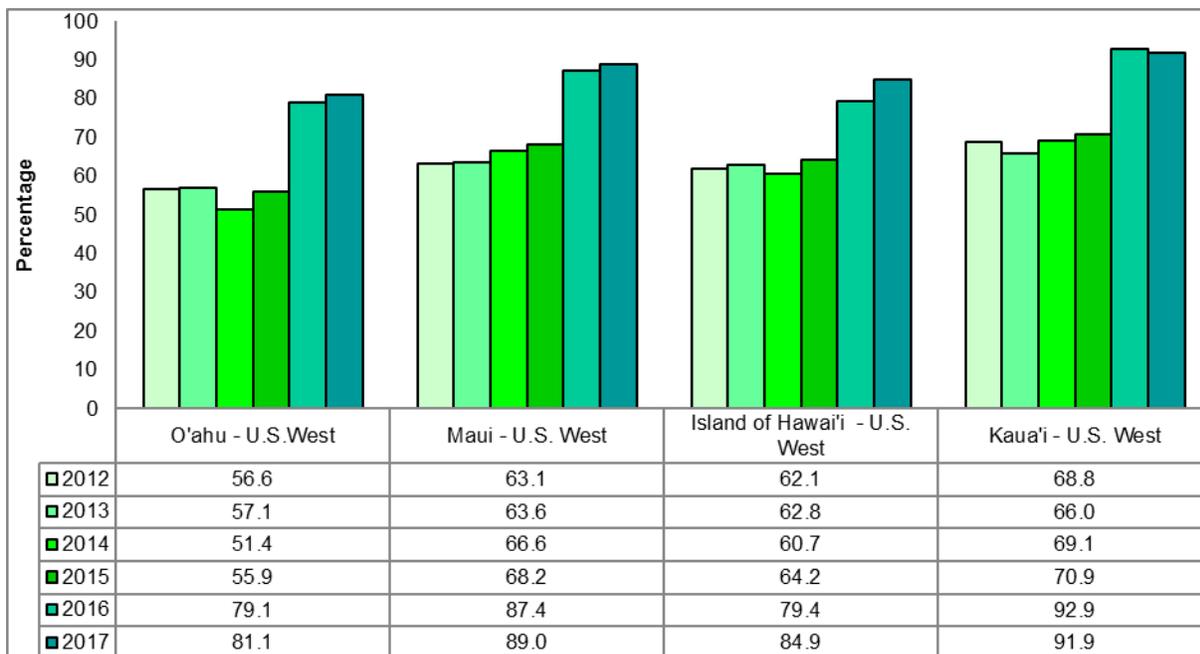
Korea: Among Korean respondents in 2017, the top two reasons for not returning were Hawai'i being “too expensive” (+7.5 points to 60.1%) and “not enough value for the price” (+19.3 points to 56.2%). The “long flight” (+15.1 points to 49.0%) and the “desire to go someplace new” (-4.9 points to 29.0%) were other reasons provided.

INDIVIDUAL ISLAND EXPERIENCE

Each island has unique characteristics, activities, and products that provide different visitor experiences. The VSAT survey asks Hawai'i visitors to rate their experience on each island they visited. Overall, the majority of visitors reported that their individual island experiences were "excellent."

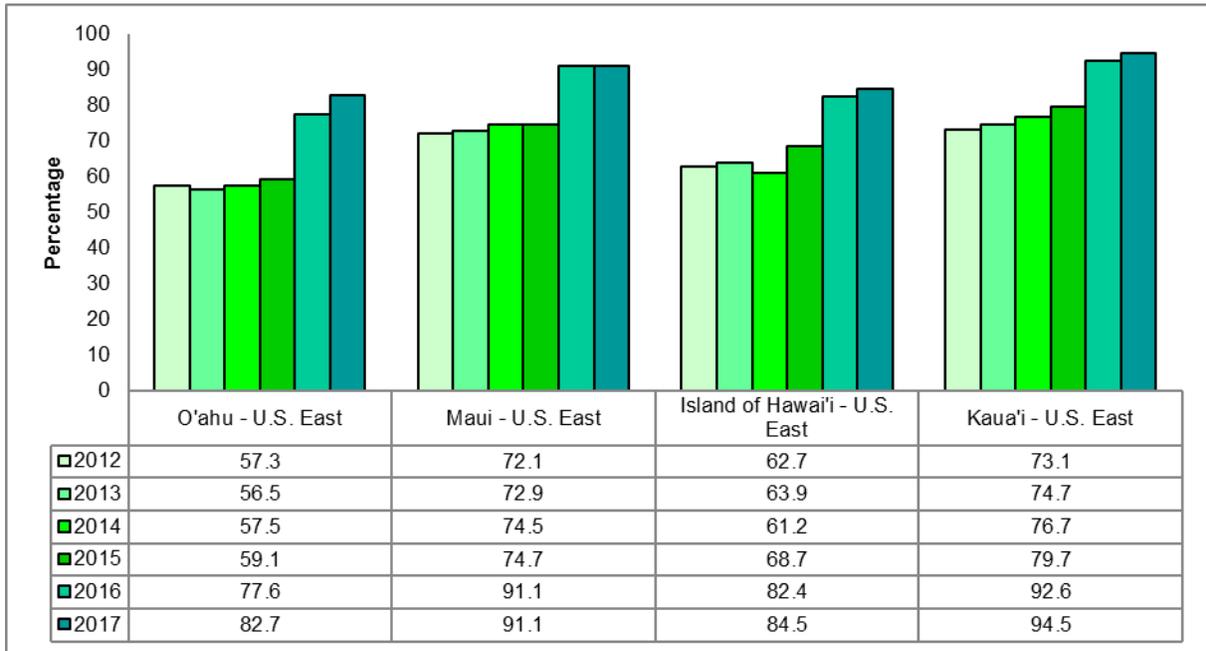
Beginning with the 2016 VSAT survey, response options for satisfaction by island were changed from a four-point scale to an eight-point scale. While these additional variance measurements will enable more detailed analysis going forward, the earliest measurable year for prior year comparisons using these new categories will be 2016. As such, in the following graphs (Figures 10 through 17) for years 2012 through 2015 the measurement of "excellent" reflects a single top category within a four-point scale (i.e., percentage of the total) whereas for years 2016 and 2017 the same category ("excellent") is represented by a combination (i.e., sum) of the top *two* favorable response scores (choices 7 and 8 on an eight-point scale) divided by the total number of responses.

**Figure 10. Island Experience Rated as "Excellent" – U.S. West
(Percentage of Visitors by Island)**



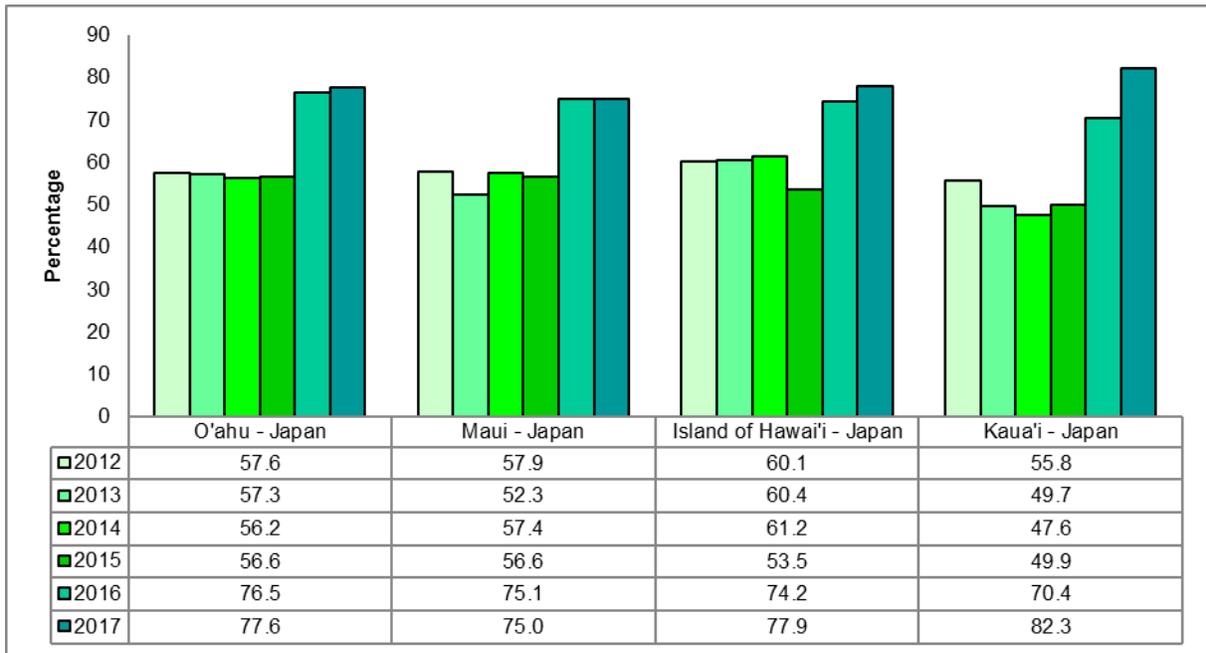
- Most U.S. West visitors in 2017 continued to give "excellent" ratings to the island they visited. Ratings for the island of Hawai'i (+5.5 points) improved compared to 2016, while ratings for O'ahu, Kaua'i, and Maui were similar to 2016.

**Figure 11. Island Experience Rated as “Excellent” – U.S. East
(Percentage of Visitors by Island)**



- A higher percentage of U.S. East respondents in 2017 continued to give “excellent” ratings to Kaua’i (94.5%) over the other islands. Ratings for O’ahu improved 5.1 points over 2016.

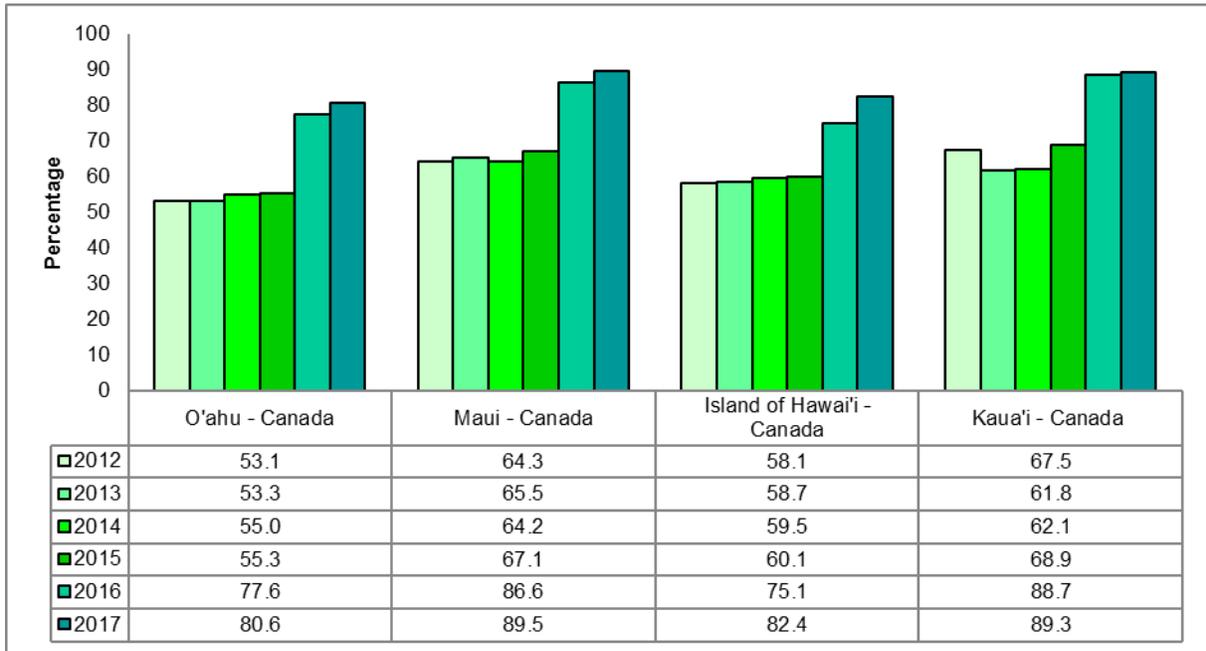
**Figure 12. Island Experience Rated as “Excellent” – Japan
(Percentage of Visitors by Island*)**



*Samples of Japanese respondents on Kaua’i were limited.

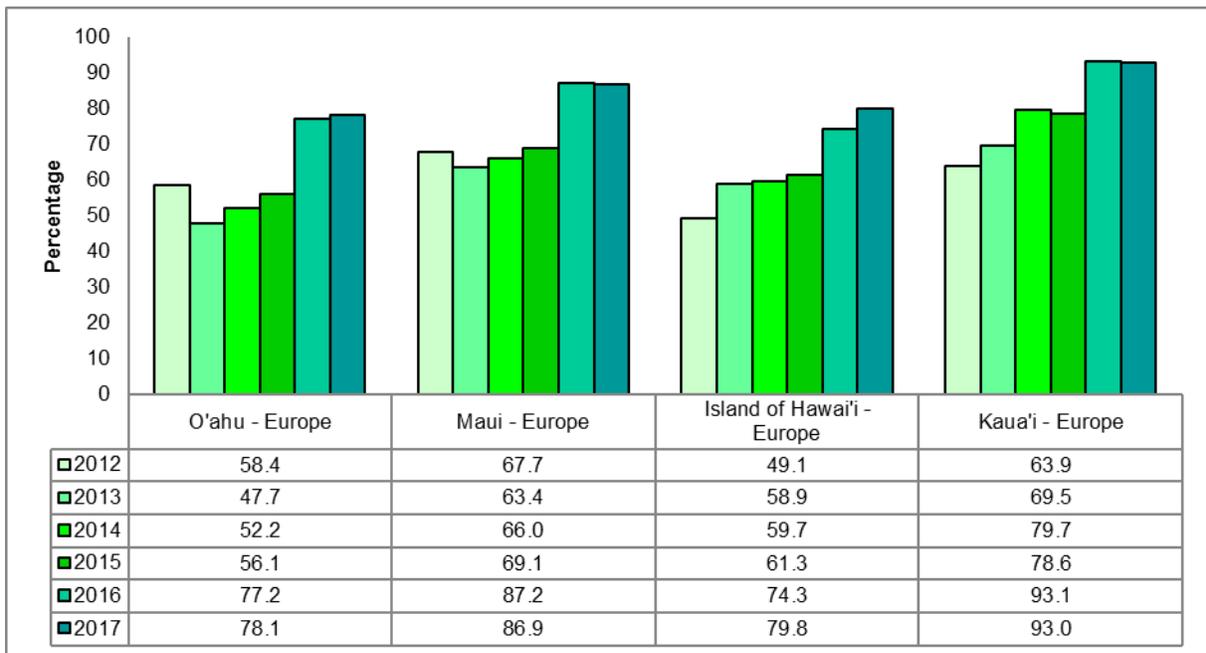
- Among Japanese respondents in 2017, the percentage of “excellent” ratings for the island of Hawai’i (+3.7 points) was higher compared to 2016.

**Figure 13. Island Experience Rated as “Excellent” – Canada
(Percentage of Visitors by Island)**



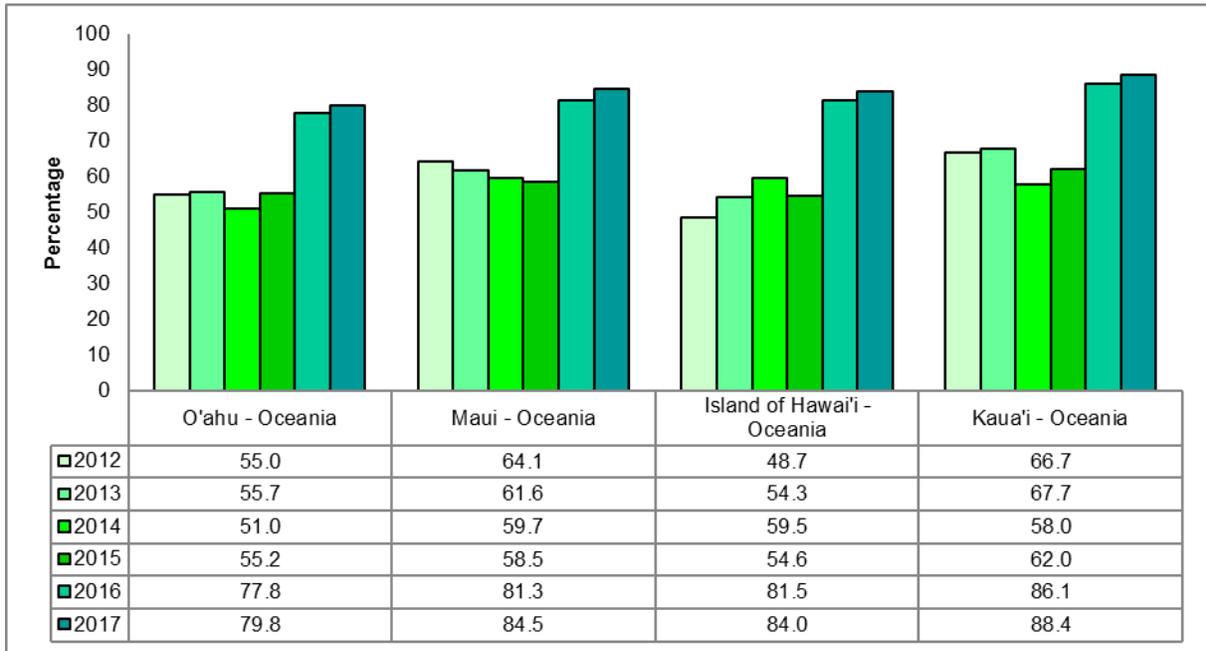
- Over 80 percent of Canadian visitors in 2017 gave “excellent” ratings to the island that they visited. Ratings for the island of Hawai'i improved 7.3 points compared to 2016.

**Figure 14. Island Experience Rated as “Excellent” – Europe
(Percentage of Visitors by Island)**



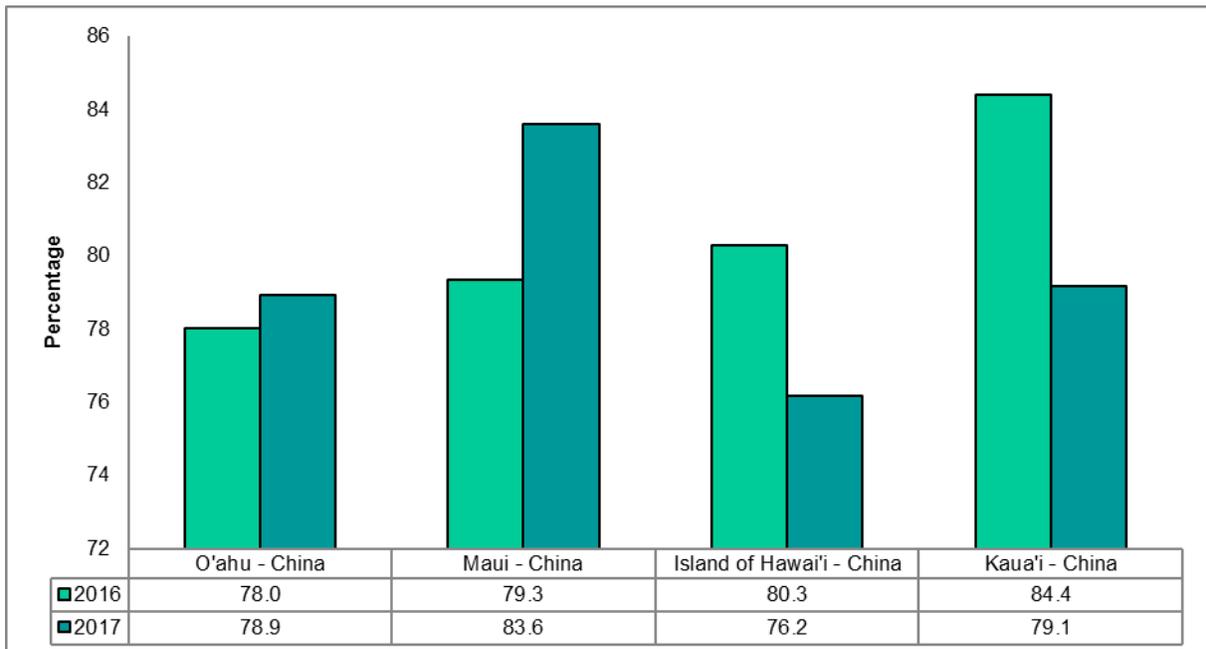
- European respondents in 2017 continued to give Kaua'i the highest percentage of “excellent” responses (93.0%) among the islands. Ratings for the island of Hawai'i rose 5.5 points versus 2016.

**Figure 15. Island Experience Rated as “Excellent” – Oceania
(Percentage of Visitors by Island)**



- Most Oceania respondents in 2017 gave “excellent” ratings to the island they visited. Ratings for Maui improved 3.1 points over 2016.

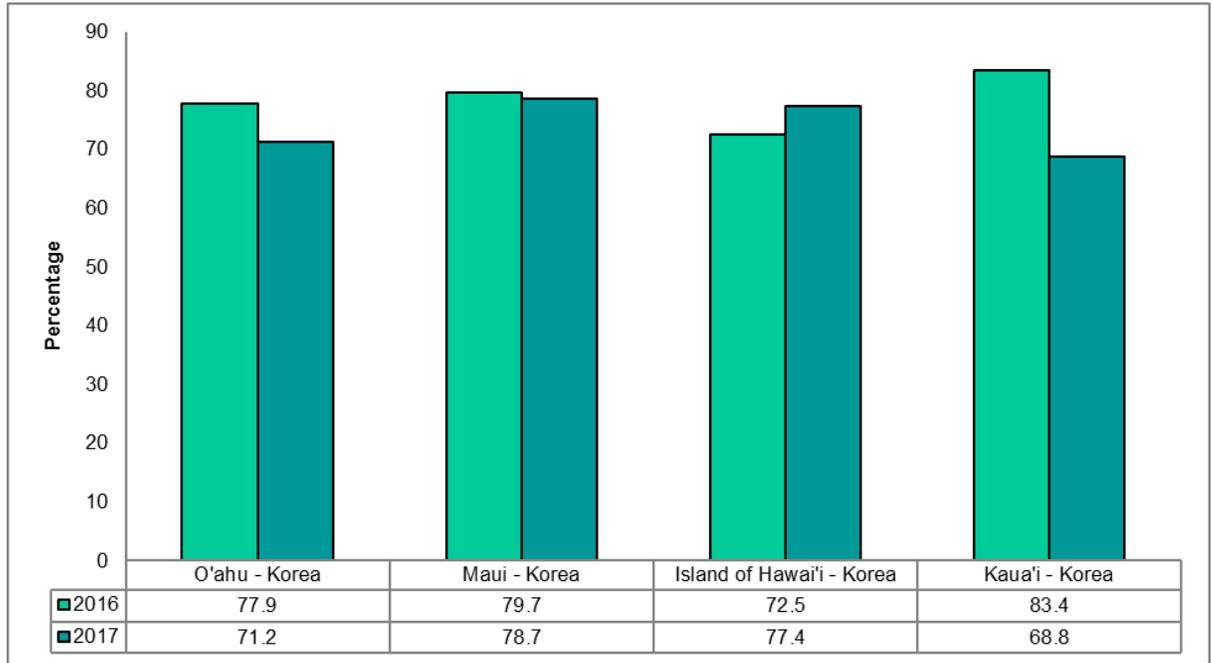
**Figure 16. Island Experience Rated as “Excellent” – China
(Percentage of Visitors by Island*)**



*Samples of Chinese respondents on Kaua'i were limited.

- In 2017, the majority of Chinese respondents continued to give “excellent” ratings to the island they visited. Ratings improved for Maui (+4.2 points) but declined for the island of Hawai'i (-4.1 points) compared to 2016.

**Figure 17. Island Experience Rated as “Excellent” – Korea
(Percentage of Visitors by Island)**



*Samples of Korean respondents on Kaua'i were limited.

- Among Korean visitors in 2017, “excellent” ratings for the island of Hawai'i improved (+4.9 points), but ratings for O'ahu decreased (-6.6 points) compared to 2016.

ACTIVITY PARTICIPATION

The VSAT survey measures visitor participation for 50 different activities in seven different geographic areas of the state (O‘ahu, Kaua‘i, Maui, Lāna‘i, Moloka‘i, Kona and Hilo). Percentages represent visitors who participated in at least one of the activities in the group at least once during their 2017 visit to Hawai‘i (See the companion Excel workbook of 2017 VSAT Data Tables 5.1 to 5.17, posted on the HTA website for activities statistics).

U.S. West

Sightseeing: Most U.S. West visitors in 2017 participated in sightseeing activities statewide (96.7%), across all island locations: Kaua‘i (98.9%), Hilo (97.6%), Kona (97.0%), Maui (95.6%), and O‘ahu (92.7%).

- Statewide, most went on “self-guided sightseeing excursions” (86.7%), while a third “visited local communities” (34.6%) or went on “boat/submarine/whale watching tours” (29.8%).

Recreation: U.S. West respondents in 2017 actively participated in recreation (96.5%).

- “Beach/sunbathing” (85.3%) was the most popular activity, followed by “swimming in the ocean/snorkeling” (70.3%), visiting “state parks/botanical gardens” (40.7%), and “running/jogging/fitness walking” (35.5%).
- In 2017, more U.S. West visitors participated in recreation activities while on Kaua‘i (94.7%) and Maui (94.6%) compared to the other islands. “Beach/sunbathing” was similarly popular on Maui (85.5%) and on Kaua‘i (82.9%).
- A higher percentage of U.S. West visitors went “backpacking/hiking/camping” (37.7%) on Kaua‘i.

Entertainment and dining: Nearly all (98.9%) U.S. West respondents in 2017 engaged in entertainment and dining activities statewide.

- In dining options, seven out of ten (70.8%) of the U.S. West respondents ate at “family restaurants” statewide.
- A higher percentage of U.S. West respondents indulged in “fine dining” while on Maui (57.4%) compared to Kaua‘i (54.3%), Kona (45.2%), O‘ahu (44.8%), and Hilo (26.8).
- A quarter of U.S. West respondents went on “lunch/sunset/dinner/evening cruises” on Maui (24.9%), Kaua‘i (23.2%), and in Kona (+23.9%).
- More U.S. West respondents on O‘ahu went to “night club/dancing/bar/karaoke” (10.3%) compared to the other island locations.
- Over half of U.S. West respondents “prepared their own meals” with Kaua‘i (54.3%) and Maui (53.5%) visitors having the highest percentages.

Shopping: Most (97.0%) U.S. West respondents went shopping statewide.

- The majority of U.S. West respondents shopped in “local shops/artisans” (68.4%), particularly on Kaua‘i (75.7%) and Maui (71.5%).
- Over half of U.S. West respondents shopped in “supermarkets” (58.1%), especially on Kaua‘i (67.0%).
- Four out of ten respondents shopped in “department stores” (43.6%), particularly on O‘ahu (43.7%).
- Statewide, other shopping venues included “convenience stores” (42.9%), “hotel stores” (33.0%), “farmers’ markets” (33.0%), “swap meet (22.8%), “designer Boutiques” (22.3%), and “discount outlets” (20.9%).

Historical and cultural activities: Three out of four U.S. West respondents engaged in historical and cultural activities (74.1%) statewide. “Lū‘au and Polynesian/hula shows” (37.3%), “historic military sites” (27.5%), “other historic sites” (30.9%), and “museums/art galleries” (22.9%) were popular attractions.

Transportation: Most U.S. West respondents used some mode of transportation (95.1%) and the majority of the respondents used “rental cars” (82.8%). Some visitors used “airport shuttles” (19.6%) and “taxis/limos” (13.4%).

U.S. East

Sightseeing: Nearly all U.S. East respondents in 2017 participated in sightseeing activities statewide (97.4%), and participation rates were high across all island locations: Kaua‘i (97.5%), Maui (97.2%), Hilo (95.6%), Kona (94.8%), and O‘ahu (94.4%).

- The majority went on “self-guided sightseeing excursions” (82.0%), some “visited local communities” (37.4%), went on “boat/submarine/whale watching tours” (33.2%), and took “private limousine/van tours” (19.9%).

Recreation: Most U.S. East respondents in 2017 participated in recreation activities (96.0%) statewide.

- The majority partook in “beach/sunbathing” (84.8%) and “swimming/snorkeling” (66.3%) activities. Visiting “state parks/botanical gardens” (47.6%), “running/jogging/fitness walking” (36.3%), and “backpacking/hiking/camping” (33.8%) were also popular with this group of visitors.
- In 2017, the percentage of U.S. East visitors that went “sunbathing/beach” was similar between Maui (76.9%) and O‘ahu (76.6%).
- “State parks/botanical gardens” were especially popular with U.S. East visitors while spending time on Kaua‘i (44.9%).

Entertainment and dining: Most U.S. East respondents engaged in these activities (97.9%).

- “Family restaurants” were popular with U.S. East respondents statewide (65.8%).
- More U.S. East visitors indulged in “fine dining” on Maui (58.6%) than other island destinations.
- “Café/coffee houses” (44.8%), “live music/state shows” (39.6%), “ethnic dining” (36.1%), “fast food restaurants” (34.9%), and “lunch/sunset/dinner/evening cruises” (33.2%) were also popular with these respondents.
- Four out of ten (40.6%) of the respondents “prepared their own meals” statewide.

Shopping: Most U.S. East respondents went shopping (95.9%) during their visit to the islands. The majority of the respondents shopped while on Maui (91.0%), O‘ahu (89.8%), Kauai (87.6%), and in Kona (84.1%).

- Over half of the respondents on Kaua‘i (68.4%), Maui (65.6%), O‘ahu (54.1%), and in Kona (58.9%) shopped in “local shops/artisans.”
- While on Kaua‘i (48.6%), Oahu (45.6%), Maui (45.3%), and in Kona (43.8%) more than four out of ten of U.S. East respondents shopped in “supermarkets.”
- While on O‘ahu, “department stores” (43.8%) and “convenience stores” (34.6%) were the next most popular shopping venues.

Historical and cultural activities: Eight out of ten U.S. East respondents engaged in historical and cultural activities (81.3%), and most of their participation took place on O‘ahu. The majority of the respondents attended “Lū‘au and Polynesian/hula shows” (61.8%). A third visited “historical military sites” (38.2%) and “other historic sites” (28.8%).

Transportation: Nine out of ten U.S. East visitors used some mode of transportation (95.0%) statewide. The majority of the respondents “rented cars” (75.3%), while some used “airport shuttles” (26.3%), “tour buses/tour vans” (20.6%), and “taxis/limousines” (20.1%).

Japan

In similar fashion to previous years, much of the activities that Japanese visitors participated in was concentrated on O‘ahu.

Sightseeing: Nearly nine out of ten (86.1%) Japanese respondents in 2017 participated in sightseeing activities.

- Statewide over 40 percent of Japanese respondents went on “self-guided tours” (43.2%).
- Four out of ten respondents (41.3%) who visited Kaua‘i chose “limos/van tours/tour buses” to go sightseeing.

Recreation: The majority of Japanese respondents in 2017 participated in recreation (88.5%). “Beach/sunbathing” (68.3%) was the most popular, followed by “swimming in the ocean/snorkeling” (35.1%).

Entertainment and dining: Most Japanese visitors participated in these activities statewide (92.6%).

- Close to half of the respondents dined in “cafés/coffee houses” (48.4%), in “Fast food” establishments (46.4%), or went on “lunch/sunset/dinner/evening cruises” (46.6%). A third of the respondents indulged in “fine dining” (36.2%) and to a lesser extent ate at “family restaurants” (26.3%). A fairly low percentage of respondents “prepared their own meals” (16.7%).

Shopping: Nearly all Japanese respondents in 2017 went shopping (96.6%) statewide.

- “Department stores” (82.2%) were the most popular shopping locations, followed by “supermarkets” (57.7%), “convenience stores” (54.1%), “duty free stores” (43.6%), “hotel stores” (39.2%), “discount outlets” (34.1%), and “designer boutiques” (33.5%).
- Fewer Japanese respondents shopped in “local shop/artisans” (15.3%) compared to visitors from other markets.

Historical and cultural activities: Close to 40 percent of Japanese respondents in 2017 engaged in these activities, led by “historical military sites” (11.3%), “other historical sites” (10.6%), and “lū‘au and Polynesian/hula shows” (10.5%).

Transportation: Japanese visitors in 2017 continued to be the heaviest users of “trolleys” on O‘ahu (57.9%) compared to other visitor groups. Usage of “rental cars” (23.4%) continued to be lower than other visitor markets statewide.

Canada

Canadian visitors continued to be heavy participants in most activities during their time in Hawai'i.

Sightseeing: Canadian visitors in 2017 actively participated in sightseeing activities (97.9%) statewide. Participation rates were similarly high across all island locations: Kaua'i (98.0%), Kona (97.4%), Hilo (96.7%), Maui (96.7%), and O'ahu (94.0%).

- Statewide, the majority did “self-guided sightseeing” (87.5%), while some “visited local communities” (40.0%).
- A third of Canadian respondents went on “boat/submarine/whale watching tours” (29.6%) which were especially popular on Kaua'i (36.8%) and Maui (32.3%).

Recreation: Most Canadian respondents in 2017 participated in recreation statewide (98.7%). “Beach/sunbathing” (87.5%), “swimming in the ocean/snorkeling” (74.3%), and “Running/jogging/walking” (40.8%) were very popular activities, especially on Maui.

Entertainment and dining: Nearly all Canadian respondents in 2017 participated in these activities (99.0%).

- The majority of the respondents dined in “family restaurants” (71.9%) statewide. “Café/coffee houses” (54.8%) and “fast food” restaurants (44.1%) were also popular dining options.
- A higher percentage of Canadian visitors indulged in “fine dining” while on Kaua'i (69.2%) compared to the other island locations.
- Statewide, more Canada respondents “prepared their own meals” (69.3%) than other visitor groups.

Shopping: Most Canadian respondents in 2017 went shopping (97.8%) statewide.

- A higher percentage of Canadians shopped at “supermarkets” (66%) and “farmer's markets” (42.4%) compared to other visitor groups.
- While on O'ahu, the majority of Canadian visitors shopped in “supermarkets” (63.7%), “local shops/artisan” (56.0%), “department stores” (55.2%), and “convenience stores” (47.8%).
- While on Maui and Kaua'i, the majority of Canadian visitors shopped in “local shops/artisans” (Kaua'i 74.4%, Maui: 69.8%) and “supermarkets” (Maui: 65.8%, Kaua'i: 63.3%).

Historical and cultural activities: Three out of four Canadian visitors participated in culture activities (74.7%) statewide. Visits to “lū'au and Polynesian/hula shows” (50.2%) and “historic military sites” (35.7%) largely took place on O'ahu.

Transportation: Most Canadian visitors statewide used some mode of transportation (97.8%). More respondents utilized “rental cars” while on Maui (86.0%) and Kaua'i (85.8%) compared to other island destinations.

Europe

Sightseeing: Most European respondents participated in sightseeing activities (98.0%). Participation rates were very high on all island locations: Kaua'i (98.5%), Hilo (98.3%), Maui (97.1%), Kona (96.7%), and O'ahu (94.9%).

- The majority of the respondents went on “self-guided sightseeing tours” across all island destinations.
- Some respondents went on “boat/submarine/whale watching tours” (32.1%), “visited local communities” (26.7%), and took “private limousine/van tours” (23.1%).

Recreation: A high percentage of European respondents (97.5%) participated in recreation, particularly “beach/sunbathing” (88.5%) and “swimming/snorkeling” (72.0%). Visiting state “parks/botanical gardens” (43.3%), “running/jogging/walking” (29.4%), and “backpacking/hiking/camping” (26.3%) were also popular with these visitors.

Entertainment and dining: Nearly all European respondents in 2017 participated in these activities (98.5%). Statewide, these respondents liked to eat in “family restaurants” (55.5%), “cafés/coffee houses” (54.1%), “fast food places” (46.6%), and “fine dining” restaurants (44.6%), while 42.9 percent “prepared their own meals.”

Shopping: Most Europeans went shopping (96.7%) statewide. Two thirds of the respondents shopped in “supermarkets” (64.1%), “department stores” (63.5%), and “local shops/artisans” (62.8%). Other popular venues included “convenience stores” (33.4%), “farmer’s markets” (29.9%), “hotel stores” (29.0%), and “discount/outlet stores” (24.5%).

Historical and cultural activities: Eight out of ten European visitors participated in these activities statewide (77.3%). Half of the respondents went to “historic military sites” (43.2%). Some visited “other historical sites” (34.1%) and attended “lū’au and Polynesian/hula shows” (36.2%).

Transportation: Most European visitors used some mode of transportation (98.0%) statewide. Two-thirds of the respondents “rented cars” (66.5%), while some used “airport shuttles” (31.7%), “taxis/limousines” (31.6%), “public buses” (19.8%) and “tour buses/tour vans” (18.2%).

Oceania

Except for sightseeing, many of the activities that respondents from Oceania participated in were concentrated on O’ahu.

Sightseeing: Participation rates in sightseeing activities by Oceania respondents were high across all island locations: Kua’i (96.0%), Hilo (95.4%), Kona (93.2%), Maui (92.5%) and O’ahu (90.5%). About half of the respondents went on “self-guided tours” (46.8%) statewide. A higher percentage of Oceania respondents went on “limos/van tours/tour buses” (35.9%) compared to other visitor groups.

Recreation: While on O’ahu, the majority of the respondents went to the “beach/sunbathing” (77.0%) and “swimming in the ocean/snorkeling” (56.4%). “Running/jogging/fitness walk” (27.1%) were also popular activities with these respondents during their visit to O’ahu.

Entertainment and dining: Nearly all Oceania respondents in 2017 participated in these activities while on O’ahu (97.9%). The majority of the respondents on O’ahu dined in “family restaurants” (73.6%) and “cafés/coffee houses” (56.4%) while some indulged in “fine dining” (37.1%). Statewide a quarter of the respondents “prepared their own meals” (23.5%).

Shopping: Statewide, most Oceania visitors participated in shopping (98.0%). While on O’ahu, eight out of ten respondents shopped in “supermarkets” (83.1%). Other popular venues on O’ahu included “department stores” (62.0%), “swap meets” (52.8%), “local shops/artisans” (49.8%), “convenience stores” (42.4%), and “hotel stores” (34.4%).

Historical and cultural activities: Three quarters of the Oceania respondents participated in culture activities statewide (74.0%). While on O’ahu, over half of these respondents attended “lū’au and Polynesian/hula shows” (54.8%). Some respondents visited “historic military sites” (30.9%) and “other historical sites” (19.9%).

Transportation: While on O‘ahu, the majority of Oceania respondents used “airport shuttles” (61.7%). Some respondents used “taxis/limousines” (42.9%), “tour buses/vans” (34.2%), “public buses” (28.3%), and “rentals cars” (25.1%).

China

Most of the activities that Chinese respondents participated in took place on O‘ahu.

Sightseeing: Participation in sightseeing activities by Chinese respondents was high across all island locations: O‘ahu (95.1%), Hilo (94.5%), Kona (93.6%), Maui (92.7%) and Kaua‘i (91.9%). Statewide, the majority went on “self-guided sight-seeing tours” (63.5%). Some respondents took “boat tours/submarines/whale watching tours” (30.4%), “private limousines/van tours” (22.0%), “movies/television location tours” (21.3%), and “visited communities” (20.7%).

Recreation: A high percentage of Chinese respondents participated in recreation (92.5%) while on O‘ahu. “Beach/sunbathing” (78.3%) was the most popular activity, followed by visiting “state parks/botanical gardens” (44.6%) and “swimming in the ocean/snorkeling” (26.3%).

Entertainment and dining: Nine out of ten Chinese respondents participated in entertainment and dining activities. While on O‘ahu, over half of the respondents went on “lunch/sunset/dinner/evening cruises” (53.6%). Half of the respondents visiting O‘ahu (50.0%) and Maui (48.9%) indulged in “fine dining”. While in Hilo, four out of ten of respondents (43.9%) dined in “cafés/coffee houses”.

Shopping: Nearly all Chinese respondents went shopping (97.2%) statewide. While on O‘ahu, the majority shopped in “supermarkets” (78.2%) and “duty-free stores” (61.3%), while a third of the respondents shopped in “department stores” (42.8%), and “convenience stores” (36.7%). Seven out of ten respondents shopped while on Maui, Kaua‘i, Hilo, and Kona, and much of the shopping took place in “supermarkets”, “department stores”, and “convenience stores.”

Historical and cultural activities: A high percentage of Chinese respondents participated in these activities (83.9%) while on O‘ahu, and the majority attended “lū‘au and Polynesian/hula shows” (68.3%). Some respondents visited “museums/art galleries” (19.8%), “historic military sites” (15.7%), and “other historical sites” (18.5%).

Transportation: While on O‘ahu 97.5 percent of Chinese respondents used some mode of transportation. A third of the respondents used “rental cars” (38.0%), “tour buses/tour vans” (34.0%) or “airport shuttles” (31.0%) while 22.0 percent took “taxis/limousines” and 18.9 percent used “public buses.”

Korea

Many of the activities in which Korean respondents participated were concentrated on O‘ahu.

Sightseeing: There was heavy participation in sightseeing activities across all island locations: Kaua‘i (98.3%), O‘ahu (97.6%), Maui (97.6%) Hilo (96.9%), and Kona (95.2%). Statewide, the majority of Korean respondents went on “self-guided sightseeing tours” (72.7%). Some respondents took private “limousines/van tours” (20.3%), “visited communities” (14.4%), took “boat tours/submarines/whale watching tours” (13.4%), and went on “movies/television location tours” (13.0%).

Recreation: Most Korean respondents participated in recreation while on O‘ahu (94.0%). The majority went to the “beach/sunbathing” (70.7%) and “swimming in the ocean/snorkeling” (62.3%).

Entertainment and dining: Nearly all Korean respondents participated in entertainment and dining activities while on O‘ahu (97.8%). Over half of the respondents “prepared their own meals” (54.2%). Close to half of the respondents dined in “cafés/coffee houses” (48.5%), “family restaurants” (48.3%), indulged in “fine dining” (47.6%), and went on “lunch/sunset/dinner/evening cruises” (45.6%). While on Maui, four out of ten Korean respondents enjoyed “fine dining (41.9%) while a third of the respondents ate in “family restaurants” (36.0%), experienced “ethnic dining” (36.4%), or went to a “live music/stage shows” (34.7%).

Shopping: Nearly all Korean respondents went shopping (98.1%) while on O‘ahu and the majority shopped in “supermarkets” (79.0%) and “swap meets” (73.2%). “Convenience stores” (50.6%), “department stores” (49.1%), and “duty-free stores” (40.7%) were also popular shopping venues.

Historical and cultural activities: Over half of the Korean respondents in 2017 engaged in historical and cultural activities while on O‘ahu (57.6%). Two out of ten respondents visited “historical military sites” (23.0%), “other historical sites” (24.1%), or attended “lū‘au and Polynesian/hula shows” (18.2%).

Transportation: While on O‘ahu, over half of the Korean respondents used “rental cars” (54.2%). Some respondents used “tour buses/tour vans” (33.5%), “trolleys” (31.6%), “taxis/limousines” (21.8%), and “airport shuttles” (18.9%).

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 2017 had a relatively short booking window 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 further in advance.

**Figure 18. Trip Decision Making - U.S. West
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	5.1%	20.1%	12.1%	30.8%	26.9%	4.9%	N/A
Decide to visit Hawai'i	5.2%	18.6%	12.0%	30.5%	28.0%	5.7%	N/A
Decide on which islands to visit	3.8%	16.5%	12.7%	32.3%	29.3%	5.5%	12.9%
Set date for the trip	2.4%	12.9%	12.2%	32.2%	34.0%	6.2%	14.7%
Choosing a place to stay	2.2%	11.3%	11.6%	31.5%	36.3%	7.1%	14.8%
Make airline reservations	0.2%	4.7%	9.6%	33.1%	45.3%	7.1%	14.8%
Purchase airline tickets	0.2%	4.2%	9.5%	33.3%	45.7%	7.1%	14.4%
Make accommodation reservations	1.9%	10.1%	11.0%	30.5%	39.0%	7.5%	14.1%
Make rental car reservations	0.3%	3.0%	6.6%	22.7%	56.9%	10.5%	18.5%
Purchase tour or attraction packages	0.3%	1.3%	2.6%	13.3%	63.5%	19.0%	57.4%

The majority (62.6%) of U.S. West respondents in 2017 made the decision to take a vacation within six months before their trip; and for those choosing Hawai'i as a vacation destination, 64.2 percent made their decision within six months before their trip. Actual reservations and ticket purchases took place closer to the date of travel: Over half (52.7%) of the respondents purchased tickets, 46.5 percent made accommodation reservations, and 67.4 percent made rental car reservations within three months of their trip to the islands. Over 60 percent purchased tour or attraction packages between one to three months out, whereas 19.0 percent waited until less than one month before arrival. Additionally, 57.4 percent purchased packaged tours while traveling.

**Figure 19. Trip Decision Making - U.S. East
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	6.1%	22.3%	13.3%	30.7%	23.5%	4.3%	N/A
Decide to visit Hawai'i	7.1%	20.0%	13.2%	30.0%	25.3%	4.4%	N/A
Decide on which islands to visit	4.1%	18.2%	13.0%	30.5%	29.2%	5.1%	14.1%
Set date for the trip	2.9%	14.7%	13.2%	31.0%	33.1%	5.1%	14.4%
Choosing a place to stay	2.6%	11.9%	12.1%	29.8%	36.6%	6.9%	13.5%
Make airline reservations	0.3%	6.5%	10.8%	32.3%	43.6%	6.5%	14.3%
Purchase airline tickets	0.2%	6.2%	10.7%	32.0%	43.9%	6.9%	14.1%
Make accommodation reservations	1.5%	10.3%	13.0%	29.2%	38.7%	7.3%	13.6%
Make rental car reservations	0.3%	3.5%	7.1%	22.5%	54.0%	12.6%	19.4%
Purchase tour or attraction packages	0.1%	1.6%	4.6%	17.3%	61.4%	15.0%	60.1%

Close to 60 percent of U.S. East respondents decided on a vacation (58.3%), decided to visit Hawai'i (59.7%), and decided which islands to visit (64.7%) within six months before arrival. Half of the respondents purchased their airline tickets (50.9%) and made their lodging reservations

(46.0%) within three months before their trip. The majority waited three months or less to make car reservations (66.7%) and purchase tour packages (76.4%). Six out of ten U.S. East respondents purchased packaged tours (60.1%) while their trip was in progress.

**Figure 20. Trip Decision Making - Japan
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	1.0%	11.6%	6.2%	30.6%	44.3%	6.3%	N/A
Decide to visit Hawai'i	1.6%	12.7%	6.3%	32.8%	41.4%	5.1%	N/A
Decide on which islands to visit	1.4%	11.3%	7.0%	31.0%	44.0%	5.4%	24.8%
Set date for the trip	0.6%	9.7%	7.7%	30.9%	45.3%	5.8%	49.8%
Choosing a place to stay	0.3%	7.0%	7.5%	30.2%	48.3%	6.6%	18.1%
Make airline reservations	0.7%	8.9%	6.5%	28.6%	49.2%	6.1%	17.8%
Purchase airline tickets	0.2%	5.9%	7.7%	28.4%	50.5%	7.4%	14.3%
Make accommodation reservations	0.4%	9.7%	7.7%	29.0%	46.4%	6.8%	14.1%
Make rental car reservations	0.5%	2.7%	1.8%	13.4%	58.8%	22.9%	7.7%
Purchase tour or attraction packages	0.0%	0.8%	1.2%	12.6%	62.8%	22.6%	26.3%

Japanese visitors in 2017 continued to have a relatively short planning and booking window as compared to Hawai'i's other major source markets. Three months or less before their arrival, 50.6 percent of the respondents decided to take a vacation, 46.6 percent decided to visit Hawai'i, and 49.4 percent decided on the islands they wanted to visit. Within three months of their trip, over half of the respondents purchased airline tickets (57.9%) and made accommodation reservations (53.2%). Also, within three months before arriving in Hawai'i, the majority of the respondents purchased tour and attraction packages (85.5%) and made rental car reservations (81.6%). Over a quarter of the respondents (26.3%) also purchased tour packages during rather than in advance of their trip.

**Figure 21. Trip Decision Making - Canada
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	3.9%	20.9%	10.9%	28.3%	30.4%	5.5%	N/A
Decide to visit Hawai'i	4.3%	19.3%	11.6%	26.7%	32.1%	6.0%	N/A
Decide on which islands to visit	3.0%	15.8%	12.0%	28.4%	34.8%	6.0%	14.0%
Set date for the trip	2.1%	14.4%	11.6%	29.6%	35.9%	6.3%	14.2%
Choosing a place to stay	2.0%	11.8%	9.9%	27.2%	41.2%	7.8%	14.4%
Make airline reservations	0.2%	6.1%	10.4%	30.2%	45.2%	7.8%	14.5%
Purchase airline tickets	0.2%	5.6%	9.9%	30.5%	45.8%	8.0%	13.8%
Make accommodation reservations	1.8%	11.0%	10.0%	27.1%	42.0%	8.1%	14.5%
Make rental car reservations	0.2%	3.8%	6.5%	22.8%	55.4%	11.3%	21.5%
Purchase tour or attraction packages	0.1%	0.9%	2.7%	12.5%	65.3%	18.5%	59.7%

Over 60 percent of Canadian respondents in 2017 decided on a vacation (64.3%), decided to visit Hawai'i (64.8%), and decided on which islands to visit (69.2%) within six months prior to arrival. Half of the respondents purchased airline tickets (53.8%) and reserved accommodations (50.2%) within three months before their trip. The majority made car reservations (66.7%) and purchased tour packages (83.8%) within three months of their arrival. Over half of the respondents purchased tour packages (59.7%) while their trip was in progress.

**Figure 22. Trip Decision Making - Europe
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	7.2%	25.1%	14.4%	30.8%	18.7%	3.7%	N/A
Decide to visit Hawai'i	7.4%	22.2%	15.1%	30.5%	20.7%	4.1%	N/A
Decide on which islands to visit	4.0%	18.5%	15.7%	30.8%	26.6%	4.4%	17.0%
Set date for the trip	4.0%	17.9%	16.0%	32.5%	25.4%	4.3%	12.4%
Choosing a place to stay	2.5%	13.0%	14.0%	30.2%	33.9%	6.4%	15.7%
Make airline reservations	0.8%	12.1%	16.1%	33.4%	31.8%	5.8%	12.1%
Purchase airline tickets	0.6%	11.9%	15.2%	32.8%	33.4%	6.0%	11.6%
Make accommodation reservations	1.2%	11.3%	14.3%	29.5%	36.9%	6.8%	12.8%
Make rental car reservations	0.4%	5.2%	7.5%	23.8%	52.9%	10.2%	21.2%
Purchase tour or attraction packages	0.7%	5.3%	4.7%	19.4%	57.3%	12.6%	59.5%

Over half of European respondents decided to take a vacation (53.2%) and picked Hawai'i as the destination (55.3%) within six months of their arrival date. The majority of the respondents made their airline reservations (71.0%), purchased airlines tickets (72.3%), and made their lodging reservations (73.2%) within six months prior to arriving. Over 60 percent made car reservations (63.1%) and purchased tour packages (69.8%) within three months before arriving to Hawaii. Six out of ten respondents purchased tour and attraction packages during their trip (59.5%).

**Figure 23. Trip Decision Making - Oceania
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	8.0%	25.7%	17.2%	32.1%	15.5%	1.5%	N/A
Decide to visit Hawai'i	5.9%	23.4%	17.9%	33.8%	17.5%	1.5%	N/A
Decide on which islands to visit	3.3%	21.1%	18.4%	35.8%	19.4%	1.9%	13.8%
Set date for the trip	3.5%	20.8%	18.6%	35.9%	18.7%	2.5%	13.7%
Choosing a place to stay	1.4%	11.9%	16.6%	37.6%	29.0%	3.6%	15.4%
Make airline reservations	1.0%	14.3%	19.0%	39.1%	24.2%	2.5%	13.0%
Purchase airline tickets	0.7%	13.9%	18.4%	38.9%	25.3%	2.8%	12.8%
Make accommodation reservations	1.0%	10.3%	15.3%	37.5%	32.7%	3.1%	14.3%
Make rental car reservations	0.3%	4.0%	9.0%	25.3%	50.5%	11.0%	20.1%
Purchase tour or attraction packages	0.7%	5.5%	9.5%	25.2%	48.2%	10.9%	61.9%

Nearly half of Oceania respondents decided to take a vacation (49.1%) and decided to visit Hawai'i (52.8%) within six months before arrival. Close to 40 percent respondents made airlines reservations (39.1%), purchased tickets (38.9%), and made accommodation reservations (37.5%) between four to six months before their trip. The majority reserved rental cars (61.4%) and purchased tour/attraction packages (59.1%) within three months of arrival; and many also purchased tour and attraction packages (61.9%) during their trip.

**Figure 24. Trip Decision Making - China
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	0.4%	3.3%	1.1%	25.7%	56.3%	13.2%	N/A
Decide to visit Hawai'i	0.6%	4.7%	2.6%	22.3%	58.5%	11.3%	N/A
Decide on which islands to visit	0.0%	0.5%	2.3%	20.5%	61.3%	15.5%	39.7%
Set date for the trip	0.0%	3.2%	1.9%	17.4%	64.9%	12.6%	36.4%
Choosing a place to stay	0.0%	1.1%	2.1%	13.2%	66.9%	16.7%	17.1%
Make airline reservations	0.0%	0.4%	1.3%	14.7%	70.0%	13.6%	19.9%
Purchase airline tickets	0.0%	0.5%	1.1%	15.1%	67.1%	16.3%	15.6%
Make accommodation reservations	0.0%	0.6%	1.5%	12.8%	67.7%	17.5%	15.6%
Make rental car reservations	0.0%	0.0%	1.5%	7.9%	63.1%	27.4%	12.3%
Purchase tour or attraction packages	0.0%	0.9%	0.0%	5.6%	67.6%	25.9%	21.2%

The majority of Chinese respondents in 2017 made their travel decisions in a relatively short time frame prior to travel. Within three months before arrival, close to 70 percent of the respondents decided to visit Hawai'i (69.8%), decided on the islands they wanted to visit (76.7%), and set their travel dates (77.5%). The vast 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.

**Figure 25. Trip Decision Making - Korea
(Percent of Visitors for Each Response, 2017)**

	TIME BEFORE DEPARTURE						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	0.3%	7.0%	5.5%	27.1%	45.7%	14.4%	N/A
Decide to visit Hawai'i	0.3%	7.0%	7.5%	25.5%	45.1%	14.7%	N/A
Decide on which islands to visit	0.2%	6.0%	8.2%	25.3%	45.0%	15.2%	N/A
Set date for the trip	0.2%	5.2%	7.2%	25.8%	45.5%	16.2%	N/A
Choosing a place to stay	0.4%	2.1%	6.9%	19.7%	52.9%	18.0%	26.5%
Make airline reservations	0.0%	4.7%	6.4%	25.2%	47.5%	16.2%	28.2%
Purchase airline tickets	0.0%	5.1%	6.9%	24.6%	45.7%	17.8%	24.9%
Make accommodation reservations	0.0%	1.5%	6.4%	22.0%	52.1%	18.0%	24.4%
Make rental car reservations	0.0%	0.9%	3.2%	13.4%	54.0%	28.6%	24.7%
Purchase tour or attraction packages	0.0%	0.7%	3.3%	12.2%	55.0%	28.8%	40.8%

Almost half of Korean respondents in 2017 decided to visit Hawai'i (45.1%), decided on which islands they wanted to visit (45.0%), and set a travel date (45.5%) 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. Four out of ten respondents purchased tour and attraction packages during their trip (40.8%).

Sources of Information Used to Plan Trip

Visitors used a variety of resources to plan their trips to Hawai'i. Figure 25 shows the sources of information utilized by 2017 visitors from each market.

**Figure 26. Resources Used in Planning their Trip to Hawai'i – 2017
(Percentage of Respondents Who used these Information)**

		VISITOR MARKETS							
		US West	US East	Japan	Canada	Europe	Oceania	China	Korea
Travel agents/ companies specializing in packaged tours	Before	20.7%	27.6%	59.5%	21.4%	40.3%	58.6%	44.0%	50.1%
	During	8.0%	11.1%	15.8%	10.1%	14.2%	12.0%	17.3%	14.2%
	After	1.4%	1.5%	3.6%	1.5%	2.5%	2.3%	9.4%	4.2%
	Did Not Use	73.5%	66.0%	37.3%	70.9%	51.1%	36.4%	49.1%	42.7%
Online social networking site	Before	25.4%	29.9%	29.5%	35.3%	41.2%	31.6%	30.6%	60.5%
	During	16.8%	19.4%	17.7%	21.7%	26.7%	18.5%	12.0%	34.9%
	After	4.5%	5.4%	4.1%	5.6%	6.5%	5.1%	6.6%	8.5%
	Did Not Use	68.0%	64.0%	64.4%	58.6%	51.4%	60.8%	63.6%	27.4%
Recommendations from friends or relatives	Before	47.8%	51.4%	34.5%	50.5%	46.7%	50.7%	31.3%	46.4%
	During	25.3%	26.5%	10.7%	20.8%	18.0%	13.5%	7.4%	10.2%
	After	4.9%	4.7%	2.4%	4.0%	3.8%	2.4%	3.6%	3.4%
	Did Not Use	45.5%	42.1%	61.0%	43.7%	47.2%	45.0%	64.5%	48.0%
Information at hotels/ resorts (front desk/ concierge/ tour desk)	Before	16.9%	18.9%	14.5%	15.8%	17.0%	13.1%	13.7%	36.5%
	During	31.6%	38.1%	19.9%	32.4%	38.1%	45.9%	13.2%	15.0%
	After	1.5%	1.3%	1.2%	1.3%	1.2%	1.5%	2.2%	1.5%
	Did Not Use	56.8%	50.4%	68.9%	56.2%	48.8%	43.4%	73.1%	51.7%
Smartphone or tablet applications relevant to your trip	Before	34.5%	34.5%	29.9%	34.0%	35.5%	29.2%	24.6%	40.1%
	During	35.4%	36.9%	19.4%	35.2%	38.6%	30.8%	15.8%	22.2%
	After	5.3%	5.7%	3.5%	5.0%	4.8%	2.9%	5.4%	3.5%
	Did Not Use	51.9%	51.8%	63.1%	52.2%	46.8%	56.3%	68.3%	48.8%
Information from airline/commercial carriers	Before	36.1%	34.4%	21.0%	35.0%	34.7%	31.8%	15.2%	37.4%
	During	9.5%	11.4%	6.4%	10.3%	13.4%	9.2%	5.1%	5.6%
	After	1.7%	1.9%	1.6%	1.6%	1.5%	0.6%	1.9%	1.5%
	Did Not Use	60.0%	61.8%	75.0%	61.3%	58.9%	63.6%	80.6%	58.6%
Personal experience	Before	58.6%	47.9%	37.3%	53.5%	32.6%	41.2%	24.9%	29.1%
	During	42.9%	36.3%	15.2%	38.7%	28.7%	27.3%	11.7%	14.0%
	After	15.8%	13.1%	4.4%	13.7%	9.4%	8.4%	10.6%	6.3%
	Did Not Use	31.2%	43.1%	58.4%	36.7%	53.6%	47.7%	65.7%	58.6%
Online travel booking site/online travel agent	Before	30.6%	32.0%	29.6%	39.9%	35.9%	37.8%	28.0%	36.4%
	During	4.7%	7.3%	5.6%	8.5%	10.4%	6.2%	11.9%	8.3%
	After	1.1%	1.5%	2.2%	1.5%	1.6%	1.0%	4.9%	1.2%
	Did Not Use	67.8%	66.2%	68.1%	57.8%	60.1%	60.1%	66.3%	59.4%
Online webpage or blog covering Hawai'i	Before	30.3%	35.0%	36.8%	41.5%	41.4%	33.5%	21.5%	47.6%
	During	15.6%	20.2%	17.7%	24.3%	24.1%	15.9%	11.2%	26.6%
	After	2.5%	3.3%	5.3%	4.3%	4.2%	2.2%	5.1%	4.7%
	Did Not Use	64.7%	59.8%	57.9%	53.0%	51.2%	61.8%	72.0%	43.2%
Hawai'i's visitor bureaus website (GoHawaii.com)	Before	18.2%	24.1%	14.9%	26.1%	26.0%	19.5%	12.8%	18.3%
	During	7.9%	10.0%	3.3%	13.0%	14.9%	10.0%	5.7%	4.8%
	After	1.9%	2.3%	2.6%	2.3%	2.3%	2.2%	3.4%	2.2%
	Did Not Use	76.9%	70.9%	82.3%	68.1%	66.5%	73.5%	81.2%	75.7%
Magazines	Before	8.7%	11.3%	33.9%	10.9%	12.9%	12.0%	8.9%	13.8%
	During	11.8%	11.2%	16.8%	16.2%	15.4%	10.5%	7.3%	6.4%
	After	1.9%	1.7%	3.3%	1.9%	2.5%	1.7%	2.6%	2.2%
	Did Not Use	81.7%	80.4%	60.1%	76.7%	75.0%	79.7%	83.0%	78.7%
Guide Books	Before	21.2%	25.8%	46.5%	27.9%	40.3%	16.0%	13.4%	27.6%
	During	23.7%	24.9%	29.3%	31.5%	34.4%	17.2%	10.2%	17.2%
	After	2.8%	2.8%	4.3%	3.2%	3.9%	1.2%	3.5%	2.1%
	Did Not Use	67.1%	62.5%	45.9%	57.1%	48.8%	72.4%	76.4%	61.2%
Television shopping channel/television program	Before	3.5%	4.7%	15.8%	3.3%	4.4%	3.5%	5.9%	14.4%
	During	5.0%	4.7%	3.6%	5.4%	4.5%	5.3%	3.3%	2.3%
	After	1.2%	1.3%	3.1%	1.0%	1.6%	1.0%	1.7%	2.0%
	Did Not Use	91.6%	90.7%	81.0%	91.0%	90.5%	91.1%	89.8%	82.1%

U.S. West

U.S. West respondents in 2017 relied most heavily on personal experience (58.6%) and recommendations from friends and relatives (47.8%) when planning their trip to Hawai'i. A third of the respondents used Information from airlines (36.1%), smartphone/tablet apps (34.5%), online travel booking sites (30.6%), and webpages/blogs covering Hawai'i (30.3%). Only 20.7 percent used travel agents, the lowest percentage in this category among visitor groups.

While their trip was in progress, U.S. West visitors relied on their personal experience (42.9%), smartphone/tablet apps (35.4%), information from hotels and resorts (31.6%), recommendations from friends and relatives (25.3%), and guide books (23.7%).

U.S. East

In planning their trip to the islands, U.S. East respondents relied heavily on recommendations from friends and relatives (51.4%) and their personal experience (47.9%). Webpages/blogs covering Hawai'i (35.0%), smartphone/tablet apps (34.5%), information from airlines (34.4%), and online travel booking sites (32.0%) were also popular resources.

During their trip, U.S. East visitors relied on information from hotels and resorts (38.1%), smartphone/tablet apps (36.9%), their personal experience (36.3%), recommendations from friends and relatives (26.5%), and guide books (24.9%).

Japan

While planning their trip to Hawai'i, Japanese respondents relied more on travel agents (59.5%) compared to other visitor groups. Japanese respondents also used guide books (46.5%), their personal experience (37.3%), webpages/blogs covering Hawai'i (36.8%), recommendations from friends/relatives (34.5%), and magazines (33.9%).

During the trip, Japanese respondents used guide books (29.3%), information from hotels and resorts (19.9%), smartphone/tablet apps (19.4%), webpages/blogs covering Hawai'i (17.7%), online social networking sites (17.7%), and magazines (16.8%) to access information about Hawai'i.

Canada

Canadian respondents in 2017 relied most heavily on personal experience (53.5%) and recommendations from friends and relatives (50.5%) when planning their trip. In addition, many Canadians used webpages/blogs covering Hawai'i (41.5%), online travel booking sites (39.9%), online social networking sites (35.3%), information from airlines (35.0%), and smartphone/tablet apps (34.0%).

While their trip was in progress, a sizeable portion of Canadian visitors used personal experience (38.7%), smartphone/tablet apps (35.2%), information from hotels and resorts (32.4%), and guide books (31.5%) as resources.

Europe

Recommendations from friends and relatives (46.7%), webpages/blogs covering Hawai'i (41.4%), online social networking sites (41.2%), travel agents (40.3%), and guide books (40.3%) were the most frequently used sources for trip planning among European respondents in 2017.

Many European visitors used smartphone/tablet apps (38.6%), information from hotels and resorts (38.1%), and guide books (34.4%) as resources during their trip.

Oceania

Six out of ten respondents from Oceania used travel agents (58.6%) in trip planning. Recommendations from family and friends (50.7%), personal experience (41.2%), online travel booking sites (37.8%), webpages/blogs covering Hawai'i (33.5%), information from airlines (31.8%), and online social networking sites (31.6%) were also important planning tools for these visitors.

During their trip, many Oceania respondents used information from hotels or resorts (45.9%) and smartphone/tablet apps (30.8%).

China

Chinese respondents in 2017 relied heavily on travel agents (44.0%) to plan their trips to Hawai'i. Other resources used in trip planning were recommendations from family and friends (31.3%), social networking sites (30.6%), and online travel booking sites (28.0%).

During their trip, some respondents relied on travel agents (17.3%) and used smartphone/tablet apps (15.8%).

Korea

Six out of ten Korean respondents in 2017 used online social networking sites (60.5%) in their trip planning. Travel agents (50.1%), online webpages/blogs about Hawai'i (47.6%), recommendations from friends/relatives (46.4%), and smartphone/tablet apps (40.1%) were other popular resources.

While their trip was in progress, Korean respondents used online social networking sites (34.9%), online webpages/blogs about Hawai'i (26.6%), and smartphone/tablet apps (22.2%).

Ways Visitors Used Sources of Information

The 2017 VSAT survey inquired about how five important sources of information (mobile apps, social media, travel agents, friends/relatives, and hotel staff) were used by visitors for their trip to Hawai'i (See Figure 26).

**Figure 27. How Sources of Information Were Used by Visitor Market
(Percentage of visitors by MMA, 2017)**

	Major Market Areas							
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Deciding on your vacation destination								
Mobile apps	37.1%	35.9%	34.8%	39.2%	37.7%	37.2%	55.6%	31.2%
Social media	36.6%	39.4%	54.0%	42.5%	42.1%	39.5%	57.6%	45.6%
Travel agent	47.4%	53.1%	69.3%	45.3%	65.8%	65.1%	76.8%	55.1%
Hotel staff	15.6%	14.2%	32.0%	11.2%	10.8%	9.1%	20.8%	15.7%
Friends, family	71.0%	72.0%	58.2%	73.5%	71.2%	66.1%	74.1%	70.5%
Planning activities								
Mobile apps	57.7%	59.3%	35.1%	61.7%	62.3%	52.8%	60.9%	29.5%
Social media	59.3%	62.3%	57.3%	63.4%	57.6%	54.6%	47.1%	47.0%
Travel agent	36.5%	48.3%	39.0%	30.6%	37.6%	39.0%	48.8%	44.0%
Hotel staff	64.1%	62.5%	42.1%	57.3%	56.3%	55.1%	31.3%	27.8%
Friends, family	71.8%	72.3%	43.1%	68.6%	64.8%	57.8%	44.5%	39.4%
Making airline reservations								
Mobile apps	61.1%	58.3%	25.2%	63.3%	50.5%	37.1%	70.3%	48.0%
Social media	18.9%	16.0%	40.9%	25.0%	15.8%	13.4%	28.5%	28.5%
Travel agent	67.9%	66.4%	66.0%	70.7%	81.6%	87.9%	42.4%	69.1%
Hotel staff	1.7%	2.5%	3.7%	1.7%	2.9%	0.9%	7.0%	8.6%
Friends, family	23.2%	21.8%	18.8%	20.3%	18.8%	13.2%	22.7%	28.8%
Making hotel or other lodging reservations								
Mobile apps	51.0%	47.7%	25.7%	56.7%	50.0%	46.2%	68.3%	46.3%
Social media	24.2%	22.4%	39.1%	34.0%	23.0%	26.0%	30.2%	36.1%
Travel agent	63.6%	64.8%	67.0%	51.3%	73.6%	71.6%	39.9%	67.8%
Hotel staff	10.3%	10.0%	6.2%	8.4%	3.9%	3.9%	14.9%	12.8%
Friends, family	33.2%	32.2%	22.6%	32.1%	24.3%	19.2%	22.2%	27.5%
Making car rental reservations								
Mobile apps	54.8%	49.1%	14.9%	57.8%	43.4%	27.9%	63.0%	39.0%
Social media	19.5%	14.9%	22.8%	25.2%	14.0%	11.0%	23.9%	34.4%
Travel agent	49.9%	37.3%	9.5%	33.8%	36.0%	12.5%	23.4%	41.6%
Hotel staff	7.5%	10.0%	3.3%	9.6%	12.6%	15.6%	21.6%	22.5%
Friends, family	18.4%	17.0%	9.8%	20.6%	14.4%	9.2%	20.1%	21.7%
Purchasing tour or attraction packages								
Mobile apps	42.5%	45.1%	23.2%	44.1%	44.7%	42.4%	52.0%	32.3%
Social media	30.3%	34.0%	38.8%	31.1%	30.5%	25.6%	35.9%	36.4%
Travel agent	35.6%	41.6%	43.0%	29.8%	31.7%	29.6%	37.2%	54.6%
Hotel staff	52.6%	52.9%	19.6%	51.0%	57.8%	60.1%	40.7%	44.0%
Friends, family	32.2%	33.6%	17.4%	26.6%	25.3%	20.6%	24.0%	28.1%
Making restaurant/dining reservations								
Mobile apps	62.3%	64.9%	27.7%	58.7%	58.8%	53.2%	73.0%	55.1%
Social media	54.1%	52.1%	37.7%	50.7%	47.5%	44.0%	40.9%	70.0%
Travel agent	9.2%	14.3%	25.0%	6.7%	7.0%	3.1%	22.2%	26.1%
Hotel staff	47.1%	46.7%	25.0%	40.3%	38.2%	35.7%	37.2%	42.4%
Friends, family	58.4%	56.5%	26.8%	48.4%	41.4%	44.2%	22.1%	43.9%
Finding a place to shop								
Mobile apps	49.5%	49.7%	64.2%	49.2%	56.4%	55.3%	71.1%	51.2%
Social media	32.8%	31.1%	65.0%	35.6%	34.4%	44.8%	44.9%	68.2%
Travel agent	4.1%	7.3%	11.0%	5.4%	4.9%	6.3%	23.5%	27.3%
Hotel staff	29.2%	35.2%	65.2%	31.4%	34.1%	39.6%	30.8%	26.4%
Friends, family	40.0%	36.8%	41.5%	33.0%	29.3%	46.7%	24.7%	41.7%
Accessing maps/directions								
Mobile apps	84.3%	83.6%	73.8%	81.1%	79.7%	78.2%	78.1%	72.6%
Social media	25.8%	23.8%	60.7%	29.3%	22.3%	24.5%	29.1%	38.1%
Travel agent	6.6%	7.8%	11.6%	7.0%	7.6%	6.1%	13.0%	19.4%
Hotel staff	22.4%	26.1%	53.7%	31.7%	30.6%	38.6%	15.7%	34.5%
Friends, family	17.7%	17.6%	25.8%	15.6%	13.1%	9.5%	15.7%	20.0%
Other trip planning								
Mobile apps	1.1%	0.9%	1.3%	1.6%	0.9%	2.0%	5.4%	4.9%
Social media	1.5%	1.2%	1.5%	1.0%	1.0%	0.5%	3.5%	2.4%
Travel agent	1.9%	1.2%	0.9%	1.3%	0.7%	0.2%	4.0%	2.2%
Hotel staff	1.7%	0.9%	1.5%	1.7%	0.9%	1.3%	1.8%	4.0%
Friends, family	1.2%	1.1%	1.0%	0.8%	0.7%	0.9%	1.9%	3.9%

Mobile apps: The majority of respondents across all visitor groups used mobile apps to access maps and directions. Chinese respondents also relied heavily on mobile apps for other aspects of their Hawai'i trip, including making airline, accommodations, car, and dining reservations; planning activities; and finding places to shop.

Over half of the respondents from U.S. West, U.S. East, Canada, Europe and Oceania used mobile apps to plan activities and make restaurant/dining reservations. Among Japanese respondents, usage of mobile apps was not as extensive compared to other visitor groups. In addition to accessing maps and directions, Japanese respondents used mobile apps to find places to shop.

Social media: Many respondents across all visitor groups used social media in choosing their vacation destination, planning their activities, making restaurants/dining reservations, and finding places to shop

Travel agents: Visitors from Japan used travel agents more often than other resources when choosing a vacation destination, making airlines and lodging reservations, and purchasing tour packages. Visitors from Europe, Oceania, and Korea also relied heavily on travel agents to make airlines and lodging reservations.

Hotel staff: Overall, visitors sought assistance from hotel staff primarily to purchase tour packages followed by help in making restaurants/dining reservations, planning activities, and finding places to shop.

Friends and relatives: Recommendations from friends and relatives was the most often used source of information cited by respondents in selecting their vacation destination. To a lesser extent, their input was also used in helping respondents plan their activities as well as finding places to shop or dine.

VISITOR PROFILES

This section of the report includes a profile of 2017 Hawai'i visitors who participated in the VSAT survey. (See the companion Excel workbook of 2017 annual VSAT data tables posted on the HTA website for more details).

**Figure 28. 2017 Visitor Profile by Market
(Percentage of Visitors by MMA 2017)**

	Major Market Areas							
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
LIFESTYLE/LIFESTAGE								
Get married/honeymoon	4.0%	6.9%	18.9%	4.0%	11.2%	4.2%	10.8%	36.0%
Family	22.3%	15.3%	14.4%	23.7%	11.0%	24.7%	13.8%	17.1%
Young	10.4%	14.1%	25.2%	13.8%	19.8%	9.2%	24.8%	21.1%
Middle age	21.3%	23.0%	24.5%	22.2%	30.2%	21.8%	28.4%	20.1%
Seniors	42.0%	40.7%	17.0%	36.3%	27.9%	40.0%	22.2%	5.7%
VISITATION STATUS								
First time	19.1%	41.9%	34.9%	34.9%	71.2%	51.4%	83.0%	78.2%
Repeat	80.9%	58.1%	65.1%	65.1%	28.8%	48.6%	17.0%	21.8%
EMPLOYMENT								
Self-employed	14.9%	11.9%	9.9%	16.8%	14.0%	15.0%	16.7%	16.1%
Employed, for someone else	51.9%	60.5%	58.9%	53.7%	62.5%	59.5%	46.0%	46.4%
Retired	25.5%	21.3%	4.8%	23.7%	15.5%	19.8%	18.9%	1.6%
Student	1.8%	1.9%	6.9%	1.9%	3.9%	1.2%	7.0%	7.3%
Homemaker	4.5%	3.1%	12.1%	2.3%	1.4%	3.0%	2.7%	11.8%
Other	1.3%	1.4%	7.4%	1.6%	2.7%	1.5%	8.6%	16.9%
EDUCATION								
No, some high school	0.2%	0.5%	1.9%	1.0%	2.3%	1.9%	1.6%	1.2%
High school grad	5.5%	5.3%	18.2%	8.1%	13.5%	21.5%	8.1%	9.6%
Some college	16.3%	11.6%	6.2%	13.6%	9.5%	9.4%	5.8%	4.3%
Vocational/technical	4.1%	3.2%	10.2%	10.4%	11.3%	16.6%	2.4%	2.0%
2-year degree	9.0%	7.6%	7.5%	7.5%	5.4%	5.1%	14.8%	10.2%
4-year degree	34.6%	34.8%	47.5%	33.6%	26.5%	23.0%	43.4%	52.6%
Post grad degree	30.3%	37.1%	8.4%	25.8%	31.7%	22.6%	23.9%	20.1%

**Figure 29. 2017 More Visitor Profile by Market
(Percentage of Visitors by MMA 2017)**

	Major Market Areas							
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Gender								
Male	43.7%	43.5%	46.4%	42.1%	51.8%	38.0%	47.9%	52.2%
Female	56.3%	56.5%	53.6%	57.9%	48.2%	62.0%	52.1%	47.8%
Average Age (years)	52	51	41	50	46	52	42	37
Traveled 500+ miles in past 3 years								
Yes	81.4%	80.8%	49.0%	84.5%	84.4%	79.3%	83.3%	58.2%
No	18.6%	19.2%	51.0%	15.5%	15.6%	20.7%	16.7%	41.8%
Lived in Hawai'i								
Yes	7.9%	5.6%	1.5%	2.1%	1.3%	1.1%	6.9%	2.4%
No	92.1%	94.4%	98.5%	97.9%	98.7%	98.9%	93.1%	97.6%
Friends/relatives in Hawai'i i								
Yes	45.9%	38.8%	15.7%	18.4%	16.4%	9.5%	12.4%	11.6%
No	54.1%	61.2%	84.3%	81.6%	83.6%	90.5%	87.6%	88.4%
Own Property in Hawai'i								
Yes, I own timeshare units	8.7%	5.1%	10.8%	5.3%	1.3%	1.0%	1.2%	0.8%
Yes, I own other types of property	2.6%	1.3%	0.9%	1.7%	0.6%	0.3%	0.6%	0.3%
No, but plan to in the future	11.8%	9.9%	5.8%	9.0%	5.0%	3.0%	13.6%	10.1%
No	76.9%	83.8%	82.6%	84.1%	93.2%	95.7%	84.6%	88.8%
Traveled to Hawai'i with...								
Spouse	64.5%	60.9%	51.9%	66.6%	52.8%	67.7%	50.4%	68.7%
Other adult family member	29.1%	24.6%	26.2%	25.1%	16.7%	22.2%	21.0%	17.2%
Child/grandchild under 18	22.9%	15.6%	15.0%	23.9%	11.6%	25.2%	14.2%	17.4%
Friend/associate	15.9%	14.9%	21.7%	17.9%	15.5%	15.9%	25.2%	12.2%
Myself- traveling alone	9.0%	12.3%	7.5%	6.4%	13.4%	7.2%	10.7%	4.7%
Boyfriend/girlfriend	5.5%	6.5%	3.8%	7.0%	11.1%	4.5%	3.1%	2.5%
Same-sex partner	1.1%	1.2%	0.4%	0.9%	1.6%	1.0%	1.8%	0.3%

U.S. West

- Among U.S. West respondents in 2017, senior visitors 55 years or over (42.0%) comprised the largest age group, followed by middle age visitors between 35 and 54 years (21.3%) and young visitors under 35 years old (10.4%) (Figure 28).
- Family groups made up 22.3 percent of U.S. West respondents while four percent of the respondents came to get married/honeymoon.
- Eight out of ten U.S. West respondents (80.9%) were repeat visitors to Hawai'i.
- Two out of three respondents (66.8%) were employed (self-employed or employed for someone else) while 25.5 percent were retired.
- The majority of respondents were educated with college (43.6%) and post graduate (30.3%) degrees.
- There were more females (56.3%) than males (43.7%) among U.S. West respondents in 2017. The average age of the respondents was 52 years old.
- The majority of respondents (81.4%) had traveled on a vacation of more than 500 miles from home in the past three years.
- Nearly half of the respondents had friends or relatives in Hawai'i (45.9%), 7.9 percent were previous Hawai'i residents, 8.7 percent owned timeshares, and 2.6 percent owned other types of property in the islands.
- The majority of U.S. West respondents traveled to the islands with their spouses (64.5%), 29.1 percent came with other adult family members, and 22.9 percent came with children under 18 years of age. Additionally, 15.9 percent came with friends/business associates.
- Four out of ten U.S. West respondents (39.1%) reported household income between \$100,000 to \$199,999, and 12.3 percent had income over \$200,000 (see 2017 VSAT companion table, income).

U.S. East

- U.S. East respondents showed similar age distribution as their U.S. West counterparts. Senior (40.7%) was also the largest segment, followed by middle age (23.0%) and young (14.1%).
- Family groups comprised 15.3 percent of U.S. East respondents while 6.9 percent came to get married/honeymoon.
- Over half of U.S. East respondents were repeat visitors (58.1%) to Hawai'i.
- Seven out of ten respondents were employed while 21.3 percent were retired.
- The majority of the respondents held college (42.4%) or post graduate (37.1%) degrees.
- More than half of U.S. East respondents were female (56.5%) and 43.5 percent were male. The average age was 51 years old.
- The majority (80.8%) of U.S. East respondents have traveled more than 500 miles from their homes in the past three years.
- Compared to their U.S. West counterparts, fewer U.S. East respondents previously lived in Hawai'i (5.6%), have friends and relatives who live in Hawai'i (38.8%), or own property in Hawai'i (6.3%).
- Six out of ten U.S. East respondents in 2017 came with their spouses (60.9%). Some came with other adult family members (24.6%), children under 18 years old (15.6%), and friends/business associates (14.9%).

- Over 40 percent of U.S. East respondents reported household income between \$100,000 to \$199,999, and 21.9 percent had income over \$200,000 (see 2017 VSAT companion table, income).

Japan

- In 2017, 25.2 percent of Japanese respondents were young, 24.5 percent were middle age, and 17.0 percent were seniors.
- Some respondents came to get married/honeymoon (18.9%) or traveled in family groups (14.4%).
- Two thirds of the Japanese respondents (65.1%) were repeat visitors to the islands.
- The majority were employed (68.8%), 6.9 percent were students, and 4.8 percent were retirees. There continued to be more homemakers (12.1%) compared to the other visitor markets.
- Almost half of the Japanese respondents had college degrees (47.5%) and a small percentage held post-graduate degrees (8.4%).
- More females (53.6%) than males (46.4%) responded to the survey in 2017. The average age was 41 years old.
- Close to half Japanese respondents (49.0%) have taken a trip of more than 500 miles in the past three years.
- Very few respondents previously lived in Hawai'i (1.5%), but 15.7 percent have friends and/or relatives living in Hawai'i; and 11.7 percent owned timeshares or other properties in the islands.
- Over half of the respondents came with their spouses (51.9%), 26.2 percent came with adult family members, 15.0 percent came with children, and 21.7 percent traveled with friends/business associates.
- Among Japanese respondents in 2017, 15.6 percent reported household income between 7.5M to 10M yen, and 21 percent had income of 10M yen or more (see 2017 VSAT companion table, income).

Canada

- Age distribution among Canadian respondents in 2017 showed seniors (36.3%) as the largest group, followed by middle age (22.2%) and young (13.8%).
- A quarter of the respondents came with families (23.7%).
- Two thirds of Canadian respondents were repeat visitors (65.1%) to the islands.
- Similar to U.S. visitors, 70.5 percent of Canadian respondents were employed and 23.7 percent were retirees.
- Four out of ten respondents had college degrees, 25.8 percent had postgraduate degrees and 8.1 percent were high school graduates.
- There were more females (57.9%) than males (42.1%) among Canadian visitors surveyed in 2017. The average age was 50 years old.
- Most respondents (84.5%) had taken a trip of more than 500 miles in the past three years.

- Only 2.1 percent had ever lived in Hawai'i, but 18.4 percent have friends and/or relatives who live in the islands. Some own timeshare units (5.3%) or other types of property (1.7%) in Hawai'i.
- Two thirds of the respondents came with their spouses, 25.1 percent came with adult family members, 23.9 percent came with children, and 17.9 percent traveled with friends/business associates.
- Like U.S. East visitors, 37.3 percent of Canadian respondents reported income levels between \$100,000 and \$199,999 while 14.5 percent reported income of \$200,000 or more (see 2017 VSAT companion table, income).

Europe

- The largest group among European respondents in 2017 was middle age (30.2%), followed by senior (27.9%) and young (19.8%).
- Those who came to get married/honeymoon comprised 11.2 percent, while 11.0 percent of the respondents came with families.
- The majority of European respondents (71.2%) were first-time visitors.
- Three out of four respondents were employed (76.5%), while 15.5 percent were retired.
- Three out of ten European respondents were college graduates (31.8%) and another 31.7 percent had postgraduate degrees.
- In 2017, over half (51.8%) of the European respondents were male and 48.2 percent were female. The average age was 46 years old.
- Most respondents (84.4%) had taken a trip of more than 500 miles in the past three years.
- Very few respondents had ever lived in Hawai'i (1.3%), but 16.4 percent have friends and relatives in Hawai'i.
- Over half (52.8%) of the respondents came with their spouses, 16.7 percent were with other adult family members, 15.5 were with friends/business associates, 11.6 percent were with children, and 11.1 percent were with boyfriends/girlfriends.
- A quarter of the respondents (26.1%) reported income levels between \$100,000 and \$199,999 and 9.2 percent had income of \$200,000 or more (see 2017 VSAT companion table, income).

Oceania

- Senior (40.0%) comprised the largest group of respondents from Oceania in 2017, followed by middle age (21.8%) and young (9.2%).
- A quarter of Oceania respondents came with family groups (24.7%).
- Over half of Oceania respondents (51.4%) were first-time visitors.
- Three out of four respondents (74.5%) were employed while 19.8 percent were retired.
- Nearly three out of ten respondents were college graduates (28.1%) and another 22.6 percent had postgraduate degrees.
- Among survey respondents from Oceania, 62.0 percent were female and 38.0 percent were male. The average age was 52 years old.
- The majority (79.3%) respondents had taken a trip of more than 500 miles in the past three years.

- One percent of the respondents (1.1%) had previously lived in Hawai'i, and 9.5 percent had friends and relatives who resided in the islands.
- Two out three respondents (67.7%) came with their spouses, 25.2 percent traveled with children, 22.2 percent were with adult family members, and 15.9 percent came with friends/business associates.
- A third of Oceania respondents reported income levels between \$100,000 and \$199,999, while 11.7 percent reported income of \$200,000 or more (see 2017 VSAT companion table, income).

China

- Age distribution among Chinese respondents in 2017 showed middle age (28.4%) as the largest group, followed by young (24.8%) and senior (22.2%).
- Close to 14 percent the respondents traveled with families while 10.8 percent came to get married/honeymoon.
- Eight out of ten Chinese respondents (83.0%) were first-time visitors to Hawai'i.
- Nearly two thirds the respondents were employed (62.8%) and 18.9 percent were retirees.
- Nearly six out of ten respondents (58.2%) had college degrees and 20.1 percent held post-graduate degrees.
- There were more females (52.1%) than males (47.9%) among Chinese respondents in 2017. The average age was 42 years old.
- Most (83.3%) of the respondents had taken a trip of more than 500 miles in the past three years.
- Some respondents previously lived in Hawai'i (6.9%), while 12.4 percent had friends and/or relatives living in the islands.
- A small percentage of the respondents (1.2%) owned timeshares or other properties in Hawai'i.
- Half (50.4%) of the respondents came with their spouses, 25.2 percent were with friends/business associates, 21.0 percent came with adult family members, and 14.1 percent were with children.
- Among Chinese respondents in 2017, 13.9 percent reported household income between 657,969 Yuan and 1,151,450 Yuan, and 5.9 percent with income of 1,315,944 Yuan or more (see 2017 VSAT companion table, income).

Korea

- Age distribution among Korean respondents in 2017, showed a higher percentage of young visitors (21.1%) compared to middle age (20.1%) and senior (5.7%) visitors.
- Korean respondents had the highest percentage of visitors who came to get married/honeymoon (36.0%) compared to other visitor groups.
- The majority of Korean respondents (78.2%) were first-time visitors.
- Two thirds of the respondents were employed (62.5%), while only 1.6 percent were retired.
- The majority of the respondents were college graduates (62.9%) and another 20.1 percent had postgraduate degrees.

- Over half of Korean respondents in 2017 were male and 47.8 percent were female. The average age was 37 years old.
- More than half (58.2%) of the respondents had taken a trip of more than 500 miles in the past three years.
- Only 2.4 percent had lived in Hawai'i before, while 11.6 percent had friends and/or relatives in the islands.
- Seven out of ten (68.7%) respondents came with their spouses, 17.4 percent traveled with children, 17.2 percent came with adult family members, and 12.2 percent were with friends/business associates.
- A third of the respondents (33.9%) reported household between 47,595,376 KRW to 89,902,375 KRW, and 15.6 had income above 89,902,375 KRW (see 2017 VSAT companion table, income).

Primary Purpose of Trip

The VSAT survey inquired visitors about the primary purpose of their trip Hawai'i and respondents could only select one reason from the list shown in Table 30.

**Figure 30. Primary Purpose of Trip All Visitors
(Percentage of Visitors by MMA, 2017)**

Primary Purpose of Trip	Major Market Areas							
	US-West	US-East	Japan	Canada	Europe	Oceania	China	Korea
Vacation	60.3%	52.9%	63.5%	75.5%	63.7%	80.9%	73.0%	47.3%
Visit friends/relatives	8.8%	10.3%	1.4%	3.0%	4.9%	1.8%	2.6%	2.7%
Anniversary/birthday	9.8%	9.8%	2.0%	6.7%	7.1%	6.3%	0.9%	3.9%
Attend a business meeting or conduct business	4.0%	5.3%	1.8%	1.4%	1.8%	0.7%	1.9%	1.5%
Attend/participate in a wedding	3.2%	2.7%	5.9%	2.0%	1.8%	0.3%	1.8%	0.3%
Honeymoon	2.4%	4.9%	14.3%	2.5%	7.9%	3.1%	5.2%	32.5%
Get married/vow renewal	0.7%	0.7%	2.3%	0.6%	1.3%	0.3%	0.1%	1.3%
Convention, conference, seminar	2.8%	4.5%	0.9%	2.4%	5.0%	0.8%	3.2%	1.5%
Family gathering/reunion	1.8%	1.6%	0.7%	1.4%	0.9%	0.6%	1.0%	2.8%
Sports event	0.6%	0.8%	0.9%	1.0%	1.5%	0.4%	0.5%	0.1%
Incentive/reward	1.0%	1.5%	0.7%	1.0%	0.9%	0.2%	2.3%	3.3%
Attend/participate in a cultural/historical/music event	0.5%	0.4%	0.4%	0.2%	0.4%	0.3%	0.3%	0.1%
Shopping/fashion	0.0%	0.1%	2.5%	0.1%	0.1%	0.6%	2.5%	0.8%
Education/visit schools	0.6%	0.4%	0.9%	0.2%	0.6%	0.1%	1.9%	1.3%
Other	3.6%	4.1%	1.7%	1.9%	2.1%	3.5%	2.8%	0.6%

- **U.S. West:** Six out of ten U.S. West respondents in 2017 listed vacation (60.3%) as the primary reason for coming to the islands. A few respondents came to celebrate anniversary/birthday (9.8%) or to visit friends/relatives (8.8%).
- **U.S. East:** Vacation was the primary purpose of coming to Hawai'i for over half (52.9%) of U.S. East respondents in 2017. Some came to visit friends/relatives (10.3%) or to celebrate anniversary/birthday (9.8%).
- **Japan:** Vacation was the primary purpose for 63.5 percent of Japanese respondents coming to Hawai'i, while 14.3 percent came to honeymoon in the islands.
- **Canada:** Three out of four Canadian respondents listed vacation was their primary purpose of trip to Hawai'i. A few respondents (6.7%) came to celebrate an anniversary/birthday.

- **Europe:** Vacation was also the primary reason for 63.7 percent of European respondents. A few came to honeymoon (7.9%) or to celebrate an anniversary/birthday (7.1%).
- **Oceania:** Most respondents from Oceania listed vacation (80.9%) as their primary purpose for their trip while 6.3 percent came to celebrate an anniversary/birthday.
- **China:** Three out of four Chinese respondents listed vacation as their primary purpose for their trip, while 5.2 percent came to honeymoon in the islands.
- **Korea:** Vacation was the primary purpose for 47.3 percent of Korean respondents visiting Hawai'i. For a third of the respondents (32.5%), the primary purpose was to honeymoon.

Secondary Purposes of Trip

The VSAT survey also inquired about visitors' secondary purpose of trip while in Hawai'i and multiple responses were allowed. Results are shown below.

**Figure 31. Secondary Purpose of Trip All Visitors
(Percentage of Visitors by MMA, 2017)**

	Major Market Areas							
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Secondary Purpose(s) of Trip								
Visit friends/relatives	20.4%	21.1%	6.0%	12.5%	11.6%	5.2%	7.9%	7.7%
Anniversary/birthday	20.6%	20.7%	8.8%	18.0%	18.8%	16.0%	7.7%	18.6%
Family gathering/reunion/funeral	9.0%	6.1%	6.2%	7.7%	3.7%	4.6%	8.5%	8.0%
Attend a business meeting or conduct business	6.4%	7.0%	3.5%	2.2%	2.9%	1.4%	5.4%	2.4%
Honeymoon	3.3%	6.0%	17.2%	3.4%	9.9%	3.7%	10.1%	35.6%
Attend a convention, conference or seminar	3.8%	5.9%	1.9%	3.5%	6.4%	1.5%	5.5%	2.2%
Incentive/reward	2.7%	3.1%	1.8%	3.1%	2.7%	1.6%	7.6%	11.8%
Attend/participate in a wedding	3.7%	3.2%	8.0%	2.3%	2.1%	0.4%	2.8%	0.7%
Shopping/fashion	3.3%	2.4%	38.6%	5.0%	4.8%	20.3%	35.3%	27.1%
Attend/participate in a sporting event	1.3%	1.5%	2.5%	2.0%	2.6%	1.1%	1.3%	1.3%
Attend/participate in a cultural/historical/music event	2.2%	2.2%	1.6%	2.1%	2.2%	2.1%	1.5%	2.7%
Real estate purchase or viewing	3.2%	2.6%	1.7%	1.8%	1.4%	0.5%	3.8%	1.0%
Get married/vow renewal	1.1%	1.2%	3.6%	0.8%	2.0%	0.6%	1.2%	5.5%
Education/visit schools	1.0%	0.8%	1.9%	0.5%	1.3%	0.3%	4.3%	2.0%
Other	10.5%	9.8%	4.6%	12.0%	9.4%	16.1%	13.6%	3.6%

- For U.S. West respondents, visiting friends and relatives and celebrating an anniversary/birthday were the two most cited secondary purposes for their trip.
- For U.S. East respondents, the two most mentioned secondary purposes for their trip was also to celebrate an anniversary/birthday and to visit friends and relatives.
- Among Japanese respondents, shopping/fashion was the prevailing secondary purpose for their trip (38.6%) followed by honeymoon (17.2%).
- For Canadian respondents, celebrating an anniversary/birthday (18.0%) and visiting friends and relatives (12.5%) were the top two secondary purposes for their trip.
- Among European respondents, celebrating an anniversary/birthday (18.8%), visiting friends/relatives (11.6%), and honeymooning (9.9%) were the most cited secondary purposes for their trip.
- For Oceania respondents, shopping/fashion (20.3%) was the prevailing secondary purpose for their trip, followed by celebrating an anniversary/birthday (16.0%).
- Among Chinese respondents, shopping/fashion was the predominant secondary purpose for their trip (35.3%), followed by honeymooning (10.1%).

- Honeymooning (35.6%) was the prevailing secondary purpose for travel to Hawai'i among Korean respondents followed by shopping/fashion (27.1%) and celebrating an anniversary/birthday (18.6%).

ONE DETAIL THAT MADE TRIP TO HAWAI'I EXCELLENT

At the end of the VSAT survey there were two open-ended questions intended to provide respondents with the opportunity to offer their own subjective opinion of their trip to Hawai'i. The first question asked for the one detail that made their trip to Hawai'i "excellent". Responses are provided in Figure 32.

Figure 32. One Detail that Made Trip to Hawai'i Excellent

	VISITOR MARKET							
	US West	US East	Japan	Canada	Europe	Oceania	China	Korea
Nature/natural beauty, scenery	32.5%	40.0%	23.0%	39.5%	46.9%	16.5%	53.7%	42.4%
Beach/ocean	17.3%	10.6%	15.3%	17.8%	13.0%	12.7%	18.4%	16.3%
Relaxation/good atmosphere	13.6%	10.8%	23.9%	13.2%	7.3%	21.7%	7.3%	20.5%
Friendly people/warm hospitality/customer service	12.0%	14.6%	4.5%	12.7%	16.0%	25.2%	4.7%	7.5%
One particular packaged tour or activity	6.3%	6.3%	15.0%	5.3%	4.8%	8.6%	6.5%	6.2%
Events/celebrations with friends/family	5.9%	5.4%	5.2%	3.1%	3.0%	2.2%	0.8%	1.2%
Accommodations	3.3%	2.4%	5.8%	2.5%	1.5%	3.0%	1.6%	1.7%
Events I observed or participated in	3.4%	3.5%	2.2%	2.4%	3.0%	2.5%	3.3%	1.9%
Local culture/food/music	3.1%	3.1%	3.1%	1.6%	1.7%	1.8%	1.6%	1.2%
Military historical sites	1.1%	1.6%	0.9%	0.5%	1.5%	4.2%	1.8%	0.3%
Weather	0.2%	0.2%	0.0%	0.3%	0.2%	0.2%	0.0%	0.1%
Location	0.2%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%
Overall, non-specific positive evaluation	0.4%	0.8%	0.0%	0.2%	0.4%	0.4%	0.0%	0.0%

- **U.S. West:** For this group of respondents, Hawai'i's natural beauty was the most mentioned detail that made their trip "excellent" (32.5%). Other reasons that achieved an "excellent" rating include Hawai'i's beaches/ocean, its relaxation/good atmosphere, and its friendly people/warm hospitality/customer service.
- **U.S. East:** Four out of ten U.S. East respondents (40.0%) said the one detail that made their Hawai'i trip memorable was Hawai'i's natural beauty. Some respondents were impressed with the friendly people/warm hospitality/customer service, the relaxation/good atmosphere, and the beaches/ocean.
- **Japan:** Among Japanese respondents, the top two details that made their trip "excellent" were the relaxation/good atmosphere and Hawai'i's nature/natural beauty and scenery. Some respondents were impressed with Hawai'i's beaches/ocean and their package tours/activities.
- **Canada:** Four out of ten Canadian respondents (39.5%) said that Hawai'i's natural beauty was the one thing that made their trip "excellent". Others were impressed with Hawai'i's beaches/ocean.
- **Europe:** Nearly half of European respondents (46.9%) were impressed with Hawai'i's natural beauty. Respondents also mentioned Hawai'i's friendly people/warm hospitality/customer service.
- **Oceania:** A quarter of the respondents from Oceania (25.2%) said that their Hawai'i trip was "excellent" because of the friendly people/warm hospitality/customer service that they encountered. The relaxation/good atmosphere, and Hawai'i's natural beauty were features that also enhanced their experience.

- **China:** Over half of the respondents (53.7%) from China said Hawai'i's natural beauty made their trip "excellent" while others were impressed with Hawai'i's beaches/ocean.
- **Korea:** Four out of ten Korean respondents (42.4%) said that Hawai'i's natural beauty made their trip memorable. Others loved the relaxation/good atmosphere and were impressed with Hawai'i's beaches/ocean.

ONE THING THAT COULD BE IMPROVED

The second open-ended question asked visitors for one detail that could be improved to make their stay in Hawai'i more enjoyable. A third of the respondents from U.S. West, U.S. East, Japan, Canada Europe and Oceania, and a quarter of respondents from China and Korea experienced no negatives and had a great time in Hawai'i. Responses are provided in Figure 33.

Figure 33. Share the One Thing that Could be Improved to Make Your Stay in Hawai'i More Enjoyable

	VISITOR MARKET							
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/everything was great	33.0%	38.8%	37.9%	34.2%	35.7%	41.6%	26.2%	29.4%
Accommodations/cleanliness/upkeep	2.1%	1.3%	4.7%	2.7%	1.7%	2.8%	4.7%	5.2%
Accommodations/not as promised	1.9%	2.0%	3.4%	1.8%	2.6%	3.7%	2.4%	1.7%
Accommodations/poor service from staff	0.7%	0.3%	2.3%	0.5%	0.7%	1.5%	2.3%	1.3%
Activities/attractions (not specified)	0.5%	0.3%	0.2%	0.3%	0.3%	0.5%	0.5%	
Variety of activities/attractions	1.0%	0.8%	2.8%	1.2%	1.0%	1.2%	4.8%	3.2%
Would like to experience more local culture	5.3%	7.1%	2.3%	7.0%	9.6%	6.3%	8.8%	10.6%
Commercialization/urbanization/crowds/loss of local culture	0.5%	0.6%	0.1%	0.4%	0.6%	1.0%		
Cellphone/WIFI service/Internet access	0.1%	0.0%	0.2%	0.2%	0.2%	0.2%	0.3%	0.2%
Customer service/hospitality/the people	1.1%	1.0%	2.6%	1.1%	1.1%	2.1%	1.6%	2.8%
Unfriendly/felt unwelcome/Japanese Catered to	0.2%	0.1%	0.0%	0.2%	0.1%	0.5%	0.2%	
Cost/expensive (specific/non-specific)	3.5%	3.9%	2.5%	7.2%	7.6%	4.1%	0.8%	1.2%
Concerns about safety	2.1%	2.5%	3.9%	1.9%	1.6%	1.9%	3.0%	4.2%
Crime/safety/items lost/stolen	0.2%	0.1%		0.1%	0.1%	0.2%	0.1%	0.2%
Scams (forced to pay/purchase something)	0.1%	0.0%	0.1%	0.1%	0.1%			
Solicitors (esp. timeshare and street solicitors in Waikiki)	0.0%	0.1%	0.0%	0.1%	0.1%	0.1%		
Food/restaurant quality	2.0%	1.9%	8.1%	2.4%	3.1%	2.7%	6.0%	7.4%
Food/restaurant variety/dining options	3.8%	3.9%	5.6%	3.4%	6.7%	6.6%	19.1%	10.7%
Food/restaurant/poor service	0.9%	0.6%	3.3%	0.6%	0.7%	1.0%	1.2%	1.7%
Foreign language not spoken/understood		0.0%	0.3%	0.0%			1.3%	0.2%
Homelessness	1.5%	1.6%	0.2%	1.3%	2.1%	3.2%	0.3%	0.6%
Nuisances (dirty or unavailable public restrooms, litter, bugs, animals, noise, shabby)	1.8%	1.3%	0.8%	2.0%	1.2%	1.0%	0.5%	0.4%
More Information (signage, maps)	0.1%	0.3%	0.2%	0.4%	0.3%	0.4%	0.3%	0.1%
Driving experience (signage, road surface, traffic violations, bad drivers)	5.8%	4.9%	2.3%	4.6%	3.7%	2.0%	1.9%	3.8%
Parking (not enough/parking fees)	0.6%	0.3%	0.1%	0.2%	0.2%	0.1%	0.2%	0.5%
Ground transportation/tour busses/limos, availability of taxi cabs etc.	1.1%	1.4%	4.8%	1.7%	3.9%	2.6%	5.2%	2.2%
Public transportation (cost, availability, trolleys, buses, taxis, shuttles)	0.3%	0.3%	0.3%	0.2%	0.8%	0.9%	0.3%	0.1%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/rental car company service)	6.2%	4.9%	2.0%	6.3%	3.2%	1.6%	2.0%	3.8%
Traffic (congested/slow)	20.8%	16.0%	6.0%	15.0%	9.0%	5.9%	5.0%	6.9%
Travel Problems (cost, airport, airline, TSA/customs, cruise)	1.8%	2.1%	0.8%	1.6%	1.2%	3.2%	0.5%	0.6%
Weather	0.6%	0.6%	0.6%	0.4%	0.4%			0.2%
Other	12.0%	13.0%	8.5%	15.9%	14.2%	18.1%	7.3%	6.9%

- **U.S. West:** For this group of respondents, 20.8 percent were negatively impacted by the heavy traffic congestion. Others had issues with their rental car (long wait in line, condition of the car, bad check in/check out service, 6.2%), or had issues with driving in Hawai'i (poor signage, road surface, traffic violations, bad drivers, 5.8%). About five percent of the respondents would have liked to have experienced more local culture (5.3%).
- **U.S. East:** Among this group of respondents, traffic congestion (16.0%) was their main issue. Some respondents would have liked to have experienced more local culture (7.1%), while others had issues with their rental car experience (4.9%) and with driving in Hawai'i (4.9%).
- **Japan:** For this group of respondents, issues with food/restaurants (quality, variety, dining options, service, 17.0%) and issues with accommodations (cleanliness, not as promised, poor service, 10.5%) were the most reported experiences that negatively impacted their Hawai'i trip.
- **Canada:** Traffic congestion (15.0%) was the main issue for Canadian respondents. Some cited the high cost (7.2%) while others would like to have experienced more local culture (7.0%).
- **Europe:** For this group, 9.6 percent of the respondents felt that their experience with local culture could have been better. Traffic congestion (9.0%), the high cost (7.6%), and the lack of food/restaurant variety and dining option (6.7%) were other issues that were negative about their Hawai'i trip.
- **Oceania:** For Oceania respondents, some felt that food/restaurants (quality, variety, dining options, service, 10.3%) and accommodations (cleanliness, not as promised, poor service, 8.0%) in Hawai'i need improvement.
- **China:** for this group of respondents, 25.1 percent felt that their experience with food/restaurants in Hawai'i (quality, variety, dining options) could be improved. Some of the respondents had issues with the accommodations (9.5%), while others would have liked to have experienced more local culture (8.8%).
- **Korea:** Among Korean respondents, 18.2 percent felt that the quality, variety, and dining option with Hawai'i's food/restaurants needed improvement. Some respondents would have liked to have experienced more local culture (10.6%), while others had issues with their accommodations in Hawai'i (8.2%).

SURVEY METHODOLOGY

The 2017 VSAT survey instrument was produced in English, Japanese, Chinese and Korean. The survey contained seven pages and 30 questions inquiring about a broad range of trip-related topics including satisfaction with the trip, intention to return to Hawai'i, sources of information consulted during trip planning, activities done on each island and questions regarding demographic profile of the survey respondents.

The objective of the survey was to collect, process, and report satisfaction and activity data from a representative sample of domestic and international visitors. In 2017, the minimum requirement was 16,800 completed surveys from U.S. West, U.S. East, Japan, Canada, Europe and Oceania (Australia/New Zealand), China and Korea.

Respondents were randomly selected from within specified subgroups of the total population of possible respondents. The population was all visitor parties who departed by air in the calendar year 2017. The sampling frame, that is the segment of the population from which respondents were sampled, were all visitor parties who completed a Domestic In-Flight survey (which appears on the reverse side of the Department of Agriculture's (DOA) plant and animal declaration form), an International Departure survey, or an Island Survey and who had a departure date between January 1, 2017 and December 31, 2017.

Parties were randomly selected from within strata, or subgroups, in the population. Strata included major market area (MMA), month of departure, visitor status (first-time vs. repeat), and islands visited. The design was intended to produce a disproportionate stratified sample of our visitors with a margin of error of plus minus less than one percentage point at the 95 percent confidence level.

Selected U.S. West, U.S. East, Japanese, Canadian, European and Oceania visitors 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 Daniel K. Inouye International Airport using iPad tablets.

Figure 34. Response Rates and Sample Statistics, VSAT 2017

MMA	Completed Surveys	Response Rate	Margin of Error
U.S. West	3661	21%	1.62
U.S. East	3766	22%	1.60
Japan	4279	37%	1.50
Canada	3802	27%	1.59
Europe	2083	20%	2.15
Oceania	1737	23%	2.35
China	1006	48%	3.09
Korea	1118	40%	2.93
Total	21452	26%	0.67

The overall survey response rate for 2017 was 26 percent. That produced a sample error estimate of plus-or-minus 0.67 percentage points at the 95 percent confidence level.

APPENDIX

ENGLISH LANGUAGE VSAT SURVEY FORM, 2017



Hawaii Convention Center
1871 Kalia Road, Honolulu, Hawaii 96815
kelepona to 808 943 2416
kelepona to 808 943 2211
kuluwa pa'awahi hawaii-tourism-authority.org

David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

Name
Address
City, State Zipcode

Aloha!

We sincerely hope you enjoyed your recent trip to Hawaii.

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

In Hawaii, 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 Hawaii 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 QMark 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.hawaii-tourism-authority.org/survey2017

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

If you have any questions regarding this survey, please contact QMark Research toll free at (844) 850-3605, or by e-mail to QMSurvey@anthologygroup.com. We appreciate your visit to our islands and thank you very much for your time.

Sincerely,

George D. Szigeti
Chief Executive Officer



2017 VISITOR SATISFACTION SURVEY

If you have internet access at a computer or mobile device, you may also fill this survey on the web at:
www.hawaiitourismauthority.org/survey2017
 Your password to access the survey is the number on 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: ⊗ ⊘ ⊖ ⊙ ○

A. Which of the following islands did you visit on this most recent trip? (Mark all that apply)

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

1. How would you rate your most recent trip to Hawai'i?

	Excellent		Above Average		Below Average		Poor	
State of Hawai'i Overall	<input type="radio"/>							
How would you rate your experience on ?								
Island of O'ahu (Waikiki/ Honolulu)	<input type="radio"/>							
Island of Maui	<input type="radio"/>							
Island of Moloka'i	<input type="radio"/>							
Island of Lana'i	<input type="radio"/>							
(Hilo) Hawai'i Island	<input type="radio"/>							
(Kona) Hawai'i Island	<input type="radio"/>							
Island of Kaua'i	<input type="radio"/>							

2. Based on your most recent trip to Hawai'i, how would you rate Hawai'i on...

	Excellent		Above Average		Below Average		Poor	
Offering a variety of experiences	<input type="radio"/>							
The number of different/ unique experiences	<input type="radio"/>							
Being a safe and secure destination	<input type="radio"/>							

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

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

4. 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

5a. How likely are you to return to visit Hawai'i in the next five years?

- Very Likely ----- SKIP TO Q6
- Somewhat Likely ----- SKIP TO Q6
- Not too likely ----- CONTINUE
- Not at all likely ----- CONTINUE

5b. 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) _____

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. In addition to yourself, on this trip, who else was in your travel party? (Mark all that apply)

- Myself only (traveled alone/ no one else)
- 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. Of the people who traveled with you on this trip, how many are:

	# Males	# Females
12 years or younger		
13 to 17 years		
18 to 24 years		
25 to 40 years		
41 to 59 years		
60 or more		
TOTAL		

9a. What was the primary purpose of your most recent trip to Hawai'i? (Select only one)

9b. What, if any, was the secondary purpose of your most recent visit? (Mark all that apply)

	Q9a. Primary Purpose (one answer)	Q9b. 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/ vow renewal	<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"/>

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

	O'ahu	MauI	Kaua'I	Hawa'iI Island (Hilo)	Hawa'iI Island (Kona)	Moloka'I	Lana'I
Sightseeing	On own (self-guided)/ Driving around island	<input type="radio"/>					
	Helicopter ride or airplane tour	<input type="radio"/>					
	Boat Tour/ submarine ride/ whale watching	<input type="radio"/>					
	Visiting communities - i.e. Chinatown, Haleiwa	<input type="radio"/>					
	Private limousine/ van tour/ tour bus	<input type="radio"/>					
	Scenic views/ natural landmarks	<input type="radio"/>					
	Movie and television filming location tours	<input type="radio"/>					
Recreation	Beach/ sunbathing	<input type="radio"/>					
	Bodyboarding/ paddleboarding	<input type="radio"/>					
	Surfing	<input type="radio"/>					
	Canoeing/ kayaking	<input type="radio"/>					
	Swimming in the ocean/ snorkeling	<input type="radio"/>					
	Windsurfing/ kitesurfing	<input type="radio"/>					
	Jet skiing/ parasailing	<input type="radio"/>					
	Scuba Diving	<input type="radio"/>					
	Fishing	<input type="radio"/>					
	Golf	<input type="radio"/>					
	Running/ jogging/ fitness walking	<input type="radio"/>					
	Spa	<input type="radio"/>					
	Backpacking/ hiking/ camping	<input type="radio"/>					
	Agritourism – i.e. farms, ranches	<input type="radio"/>					
	Sports event or tournament	<input type="radio"/>					
Parks/ botanical gardens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Entertainment & Dining	Lunch/sunset/ dinner/ evening cruise	<input type="radio"/>					
	Live music/ stage show	<input type="radio"/>					
	Nightclub/ dancing/ bar/ karaoke	<input type="radio"/>					
	Fine dining	<input type="radio"/>					
	Family restaurant	<input type="radio"/>					
	Fast Food	<input type="radio"/>					
	Café/ coffee house	<input type="radio"/>					
	Ethnic dining	<input type="radio"/>					
Prepared own meals	<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"/>					
	Designer boutiques	<input type="radio"/>					
	Hotel stores	<input type="radio"/>					
	Swap meet or flea market	<input type="radio"/>					
	Discount/ outlet stores	<input type="radio"/>					
	Supermarkets	<input type="radio"/>					
	Farmer's market	<input type="radio"/>					
	Convenience stores	<input type="radio"/>					
	Duty free stores	<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"/>	
History, Culture & Fine Arts	Historic military site	<input type="radio"/>					
	Other historic site	<input type="radio"/>					
	Museum/ art gallery	<input type="radio"/>					
	Luau/ Polynesian show/ hula show	<input type="radio"/>					
	Lessons such as ukulele or hula or canoeing	<input type="radio"/>					
	Play/ concert/ theatre	<input type="radio"/>					
	Art/ craft fair	<input type="radio"/>					
Festival/ events (specify) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Transportation	Airport shuttle	<input type="radio"/>					
	Trolley	<input type="radio"/>					
	Public bus	<input type="radio"/>					
	Tour bus/ Tour van	<input type="radio"/>					
	Taxi/ Limousine	<input type="radio"/>					
	Rental car	<input type="radio"/>					

11. 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 to keep up with what's happening in Hawai'i? (Mark all that apply)

	(A) Before	(B) During	(C) After
a Travel agents/ Companies specializing in packaged tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b Online social networking site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c Recommendations from friends or relatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d Information at hotels/ resorts (front desk/ concierge/ tour desk)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e Smartphone or tablet applications relevant to your trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f Information from airline/ commercial carriers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g Personal experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h Online travel booking site/ online travel agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i Online webpage or blog covering Hawai'i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j Hawai'i's visitor bureaus website (GoHawaii.com)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k Magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l Guide Books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m Television shopping channel/ television program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. If you used a, b, c, d or e in the question above please specify how you did so below. (Mark all that apply)

	a - Travel Agent/ Tour Company	b - Social Media	c - Friends or Family	d - Hotel Front Desk/ Concierge/ Tour Desk	e - Mobile Device/ Phone or Tablet Apps
Deciding on your vacation destination	<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, attraction, or activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selecting restaurants/ dining reservations	<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"/>
Other (specify) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. This trip to Hawai'i was my:

- 1st
- 2nd
- 3rd
- 4th
- 5th
- 6th to 10th
- More than 10th

16. **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

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

19. Have you ever lived in Hawai'i before?

- Yes
- No

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

- Yes
- No

21. 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

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

22. What is your age?

23. What is your gender?

- Male
- Female

24. Please indicate your highest level of educational training:

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

25. What is your employment status?

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

26. Which of the following categories includes your household's total annual income from all sources before taxes for 2016 (in US dollars)?

- Up to \$40,000
- \$40,000 to \$59,999
- \$60,000 to \$79,999
- \$80,000 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

27. 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\$

28. How would you rate your overall satisfaction with your most recent trip to Hawai'i?

- | | | | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Extremely Satisfied | | | | | | | Not at all Satisfied |
| 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| <input type="radio"/> |

29. Please tell us about ONE detail that made your trip to Hawai'i **excellent**. (Select only one)

- One particular Packaged Tour or Activity
- Events I observed or participated in
- Friendly, warm people/ Customer service/ Hospitality
- Nature/ Natural beauty, scenery
- Relaxation/ Good atmosphere
- Accommodations
- Local culture/ Food/ Music
- Military historical sites
- Events/ Celebrations with friends/ family
- Beach/ Ocean
- Other (please specify) _____

30. If applicable, please share the ONE thing that could be **improved** to make your stay in Hawai'i more enjoyable. (Select only one)

- No negatives/ everything was great
- Food/ restaurant quality
- Food/ restaurant variety/ dining options
- Food/ restaurant/ poor service
- Accommodations/ not as promised
- Accommodations/ cleanliness/ upkeep
- Accommodations/ poor service from staff
- Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)
- Driving experience (signage, road surface, traffic violations, bad drivers)
- Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.
- Variety of activities/ attractions
- Overall customer service/ hospitality/ the people
- Would like to experience more local culture
- Concerns about safety
- Traffic (congested/slow)
- Other (please specify) _____

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.