



HAWAII MARKETING EFFECTIVENESS

2015-2018 – WAVE 5/6

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

(NOV 2017)

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RESEARCH OBJECTIVES

The purpose of this study is to measure and evaluate the effectiveness of the marketing efforts conducted by marketing concerns under contract with the Hawai'i Tourism Authority.

This study, conducted since 2003, provides insight into the overall intention to travel to Hawai'i, brand valuation, and measurement of specific, separate attributes for Hawai'i's major marketing areas of U.S. West, U.S. East, Canada and Japan.

The major goals of this study are to understand:

- Consideration of Hawai'i as a destination
- Importance of key attributes
- Preference for Hawai'i
- Preference for Hawai'i by behavioral segments
- Opinions of Hawai'i vs. Competitive destinations for each major marketing area:
 - Eastern U.S. (Florida, Costa Rica, Puerto Rico, California, Mexico, Caribbean, Las Vegas and Europe)
 - Western U.S. (Alaska, Costa Rica, Australia, Mexico, Caribbean, Las Vegas and Europe)
 - Canada (Florida, Arizona, Australia, California, Mexico, Caribbean, Las Vegas and Europe)
 - Japan (Australia, China, Guam/Saipan, Korea, Europe, Taiwan, Singapore, Thailand, Hong Kong)

In addition, the study tracks data on the topics as well:

- Intention to/or actual visits to Hawai'i
- Hawai'i travel patterns and visitor profiles (Accommodations, Length of Stay, Frequency, Satisfaction)
- Indication of reasons for not intending/considering Hawai'i

RESEARCH OBJECTIVES

Online surveys of approximately 15 minutes in length conducted in November 2015, March 2016 and November 2016, March 2017 and November 2017. Each survey was presented in the language of the surveyed country or was localized, if necessary, for countries where English is the primary language.

Qualified respondents from each major marketing area were required to meet specific requirements for inclusion in this study:

- Eastern U.S.
 - Live in the states of North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Texas, Minnesota, Iowa, Missouri, Arkansas, Louisiana, Wisconsin, Illinois, Tennessee, Mississippi, Michigan, Indiana, Kentucky, Alabama, Ohio, West Virginia, Georgia, Florida, Pennsylvania, Virginia, North Carolina, South Carolina, New York, Vermont, New Hampshire, Maine, Massachusetts, Rhode Island, Connecticut, New Jersey, Delaware, Maryland, Washington, D.C.
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of USD \$75,000 or more
 - 18 years of age or older

- Western U.S.
 - Live in the states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of USD \$75,000 or more
 - 18 years of age or older

RESEARCH OBJECTIVES

- Canada
 - Live in the provinces of British Columbia, Alberta and Saskatchewan
 - Have taken a Leisure trip by air of 500 miles or more in the past 12 months
 - Household income of CDN \$75,000 or more
 - 18 years of age or older

- Japan
 - Live in Japan
 - Have taken and international Leisure trip in the past 24 months
 - Household income of ¥2,000,000
 - 18 years of age or older

Respondents who indicated they intend to travel to Hawai'i within then next 24 months will be re-contacted in November 2018 and March 2019 to determine if a trip was actually made. Actual re-contacts may be lower than reported here due to attrition in the panel.

Respondents are as follows:

Completes							Expected Re-Contacts					
Marketing Area	Wave 1 NOV 2015	Wave 2 MAR 2016	Wave 3 NOV 2016	Wave 4 MAR 2017	Wave 5 NOV 2017	Wave 6 MAR 2018	Wave 1 NOV 2017	Wave 2 MAR 2018	Wave 3 NOV 2018	Wave 4 MAR 2019	Wave 5 NOV 2019	Wave 6 MAR 2020
Eastern U.S.	603	602	602	600	605		125	152	193	153	179	
Western U.S.	600	600	601	600	601		294	321	322	320	301	
Canada	601	601	601	604	601		251	268	245	254	263	
Japan	606	600	600	600	601		283	244	248	238	243	

RESEARCH OBJECTIVES

For some analyses respondents are segmented depending on how they responded to questions regarding the importance of certain destination characteristics they consider when making travel decisions. Following are the definitions for each segment. Respondents must have provided a rating of 4 or 5 for at least one characteristic in each segment.

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

Explore/ Learn	Relax/ Re-energize	Culture/ Authenticity	Activity/Nature	Foodie	Togetherness	Indulge
I can explore and do new things	It's a great chance to rest and relax	To gain knowledge of history	To seek adventure	To indulge my passion for food and fine cuisine	To spend more quality time with my spouse/family	I can be more extravagant when I travel
To be the first among my friends to do something	I feel alive and energetic when I travel	To experience other cultures	To do activities I can only do on vacation		To spend more time with my friends	I can splurge on myself when I travel
To learn new things	To engage in my hobbies	To see for myself, the authentic things I have read or heard about	To be outdoors and experience nature		To celebrate or mark a special occasion	

RESEARCH OBJECTIVES

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

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

RESEARCH OBJECTIVES

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

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

Data will be presented in five major sections. The first section includes a Summary of the current Wave (NOV 2017), comparing relevant data from each of the four market areas. This will be followed by detailed data for each market area – Eastern U.S., Western U.S., Canada and Japan showing each of the past 7 waves (NOV 2014, MAR 2015, NOV 2015, MAR 2016, NOV 2016, MAR 2017 and NOV 2017) separately, except for Destination Attributes as they apply to Hawai'i specifically. For these charts, data is presented for all waves back to Q2 of 2009. The exact wording of the survey question used to compile each chart is included at the bottom of each chart within the individual market area sections.

Excluding the Summary section, charts in each set of the market sections appear in the identical order. Since the Summary section includes only data that can be compared across all markets, some charts have been excluded; the progression, however is maintained. Charts in each market section appear in the following order:

- Demographics – Age
- Demographics – Median Age
- Demographics – Income
- Demographics – Median Income
- Demographics – Sexual Orientation
- Demographics – Long Distance Overnight Trips in Past 12 Months (Past 24 Months for Japan)
- Demographics – Median Number of Long Distance Overnight Trips in Past 12 Months (*Past 24 Months for Japan*)
- Destination Consideration for Next Leisure Vacation
- Reasons for Taking a Leisure Vacation
- Attributes Important in Choosing a Destination
- Attributes Important in Choosing a Destination (Importance vs. Applies to Hawai'i)
- Attributes Important in Choosing a Destination – Segment Comparisons

- Destination Attributes – Competitive Comparisons (*competitive destinations vary by market*)
- Destination Attributes – Applies to Hawai'i
- Impression of Hawai'i
- Impression of Hawai'i by Segment
- Hawai'i Visitation by Segment
- Hawai'i Planned Visitation by Segment
- Visitation – Competitive Destinations
- Planned Visitation – Competitive Destinations
- Planned Visitation to Islands of Hawai'i
- Planned Accommodations
- Planned Accommodation Location
- Reasons for Not Visiting Hawai'i
- Lifetime Visits to Hawai'i
- Reasons for Returning to Hawai'i
- Reasons for Returning to Hawai'i – Segment Comparisons
- Year Last Visited Hawai'i
- Month Last Visited Hawai'i
- Islands' Share of Nights in Hawai'i
- Number of Nights in Hawai'i
- Average Spending in Hawai'i
- Travel Party Size
- Travel Party Composition
- Hawai'i Excellent Rating
- Likelihood of Returning to Hawai'i

NOVEMBER 2017 HIGHLIGHTS

- The age distribution was almost unchanged for the Eastern and Western travelers, at 48 and 47 respectively. Both were at 48 in the spring. At 49 years, Canadian travelers were older in this study than they were in the Spring where they were 2 years younger at 47. The Japanese travelers remained fairly consistent at 45 years, up only one year over the Spring travelers.
- Travelers to Hawai'i from all markets tend to be more affluent as their average annual household incomes exceed the national averages in each of their respective countries. In Japan, incomes for travelers declined compared to the Spring. The incomes of Eastern U.S., Western U.S. and Canadian travelers remained unchanged.
- The percentage of LGBT travelers remains low, but has risen among all groups except Western U.S. travelers. In the current wave LGBT travelers are more likely to come from the United States.
- Travelers in this study claim to have taken at least 2 long distance overnight trips in the past 12 months, but those from the Western U.S. have taken the most with an average of 3.02, followed by the Eastern U.S. at 2.62 trips. The number of trips taken increased across all geographies, except for Japan.
- Hawai'i is in the most considered leisure destination among all but Eastern U.S. a move up from number two for both Canada and Japan. Among Eastern U.S. travelers Hawai'i has moved up from number six to number 4 in consideration behind Florida, California, and the Caribbean.
- The top reasons U.S. residents travel continues to be to explore and do new things and to spend more quality time with their spouses or families. Both Canadian and Japanese travelers consider travel as a chance to rest and relax. Canadians also like to explore and do new things, while Japanese travelers like to indulge in fine cuisine.

MARCH 2017 HIGHLIGHTS

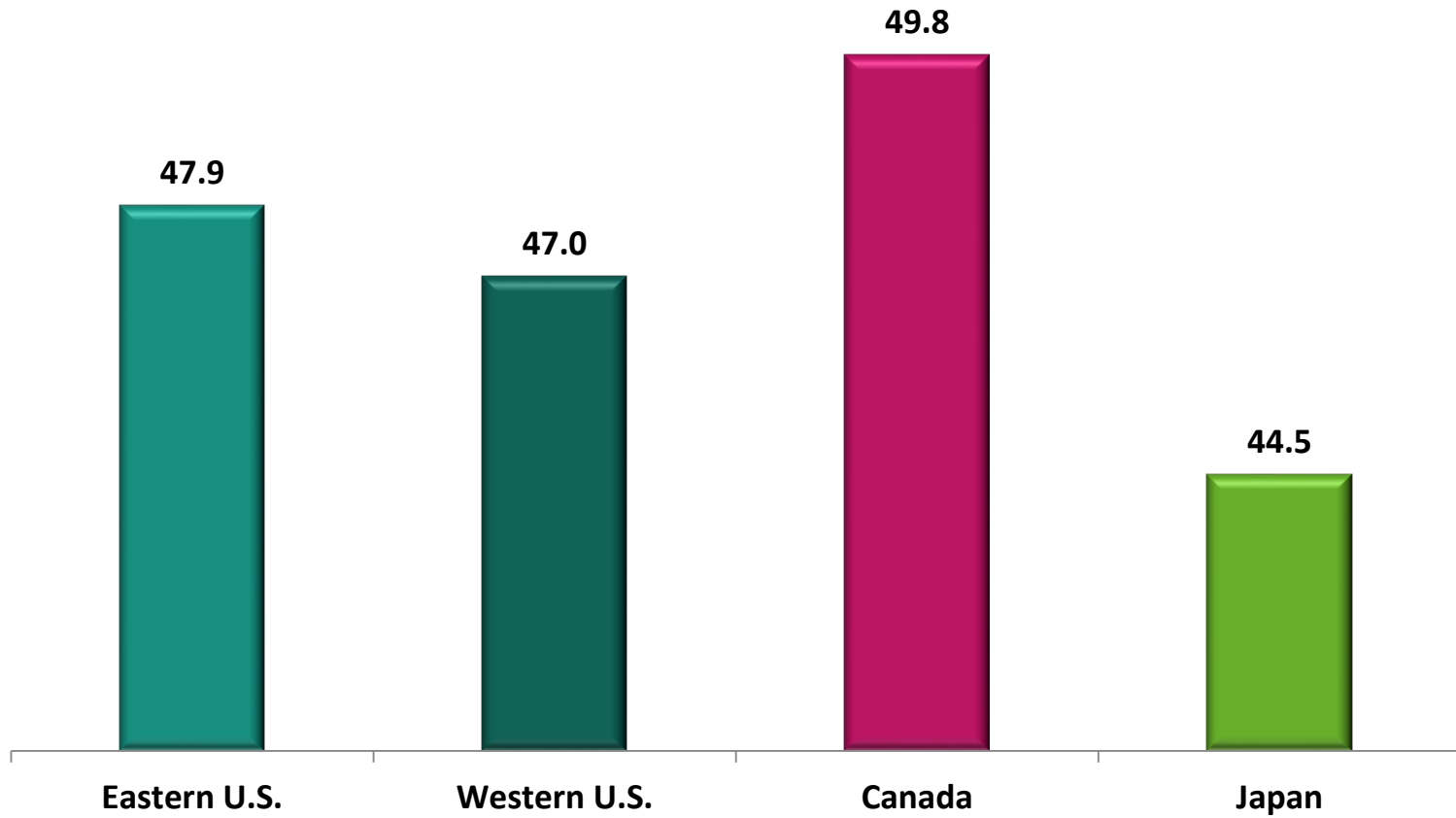
- Among the 20 attributes (22 for the Japan market) important in choosing a leisure destination, the most important reason among all visitors is that it is a safe and secure place. This is ranked as number one by over 80% of Canadians and Eastern U.S. travelers and 79% and 69% by Japanese and Western U.S. travelers respectively. For all visitors, excluding those from Japan, Hawai'i meets exceeds expectations as being a romantic place to visit.
- While there is variance among the markets, most have the consistent impression that Hawai'i has quality State/National parks and beaches and that the State delivers high levels of recreational activities (including water sports, zip lining, snorkeling, hiking, biking, etc.), and relaxation and romance. Shopping also continues to be rated highly among the Japanese market.
- About 20% of visitors from the Western U.S. and Japanese origins have visited Hawai'i in the past 12 months with an additional 20% to 10% visiting in the past 24-36 months. Only 1% of Eastern U.S. visitors have visited in the past 12 months, a decrease from the last wave, with an additional 12% visiting the past 24-36 months. The percentage of Canadian visitors who have visited in the past 12 months remained increased slightly to 15%, while those visiting in the past 24-36 months have increased from 16% to 19%.
- More than one-third of visitors from the Western U.S and Japan plan to visit Hawai'i in the next 12 months with an additional 15% and 5% planning to visit in the next 13-24 months. About 28% of Canadian and 18% of Eastern U.S. travelers plan to visit in the next 12 months. The primary reason Eastern U.S. visitors seem to be lagging behind the other markets is that they think they can get a better value at another destination as well as the price of the vacation package. Canadian travelers who are not planning to visit Hawai'i also think they can get a better value at another destination and that they have been to Hawai'i before and would like to try another destination.
- Visitors from the Eastern U.S. are least likely to visit Hawai'i in the Fall, while those from the Western U.S. and Japan prefer Summer. Canadians continue to overwhelmingly prefer to visit Hawai'i in the Winter, followed by Spring. Less than 20% of Canadian travelers visit in the Summer or Fall.

NOVEMBER 2016 HIGHLIGHTS

- Among those who are planning to visit the State, Maui is on the top of the list, except for Japanese visitors who overwhelmingly plan to visit O'ahu. This is likely due to their high opinions of the shopping in Hawai'i.
- Visitors from all markets primarily plan to stay in a hotel. It is not surprising that the overwhelming majority of all traveler groups plan to stay at a resort location. All groups are venturing out with more of them reporting planned accommodations in non-resort localities.
- As might be expected, at five visits, travelers from the Western U.S. have made the most lifetime visits to Hawai'i, followed by Canadian and Japanese visitors at almost four lifetime visits. Visitors from the Eastern U.S. have only made just under three visits to Hawai'i in their lifetimes.
- Visitors from all four markets keep returning to Hawai'i because of its stunning natural beauty, the great weather and great beaches. They also feel it is safe place to visit, especially those from Canada.
- The majority of travel parties from each origin are couples followed by families.
- At about \$4,800, visitors from the Eastern U.S. spent the most on their last trip to Hawai'i an increase over the previous wave. This is likely due to transportation costs, which like Japan account for 30% of their travel dollar. Spending among Japanese travelers also increased, but spending has decreased among travelers from the Western U.S. and Canada.
- Visitors from all four markets rate their last visit to Hawai'i higher than 6 on an excellence scale of 8 and between 17% and 32% say they are very likely to return in the next 24 months. About two thirds of Western U.S. and Canadian visitors say they are somewhat or very likely to return to Hawai'i in the next 24 months, while almost 40% of Japanese visitors claim they are likely to return in the next 24 months.

MARCH 2017 SUMMARY - ALL MARKETS

DEMOGRAPHICS - AGE



QS3. Which of the following categories includes your age?

DEMOGRAPHICS – AVERAGE HOUSEHOLD INCOME

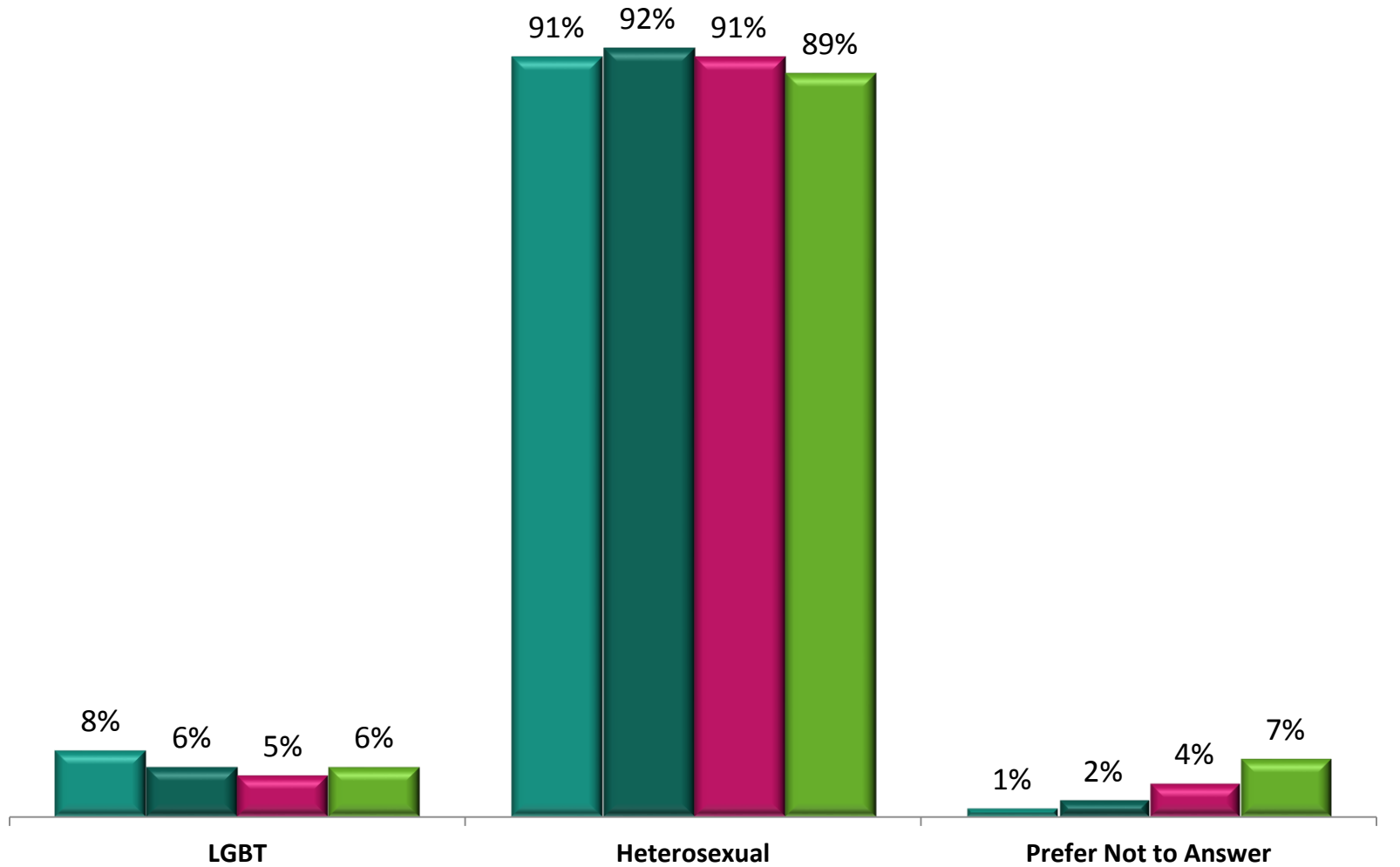
Respondents were asked to provide Annual Household Income in the currency of their country. Following are the Average Household Incomes of respondents from each region or country.

- **Eastern U.S.** (U.S. Dollars) **\$142,000**
- **Western U.S.** (U.S. Dollars) **\$141,000**
- **Canada** (Canadian Dollars) **\$133,000**
- **Japan** (Japanese Yen) **¥852**

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

DEMOGRAPHICS – SEXUAL ORIENTATION

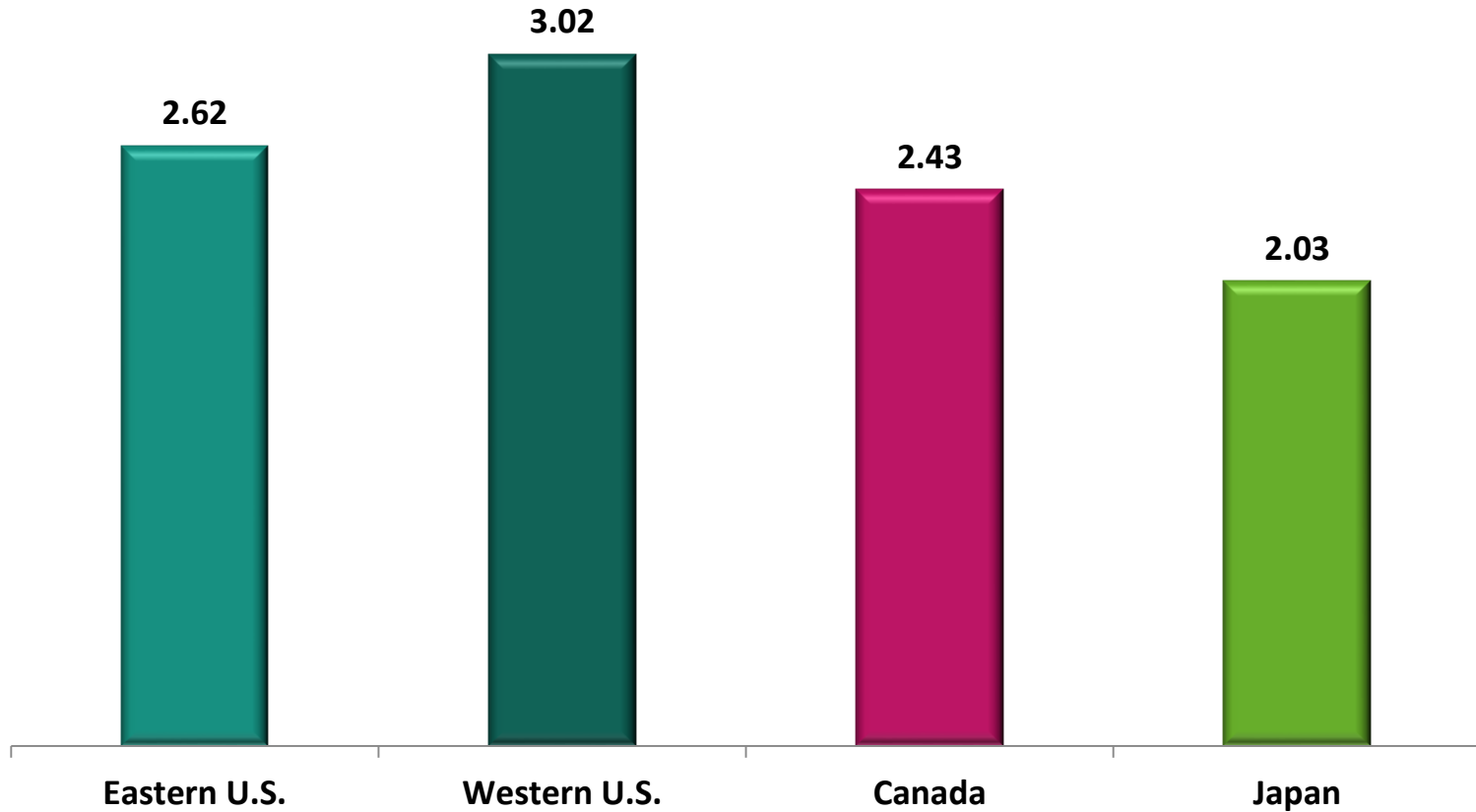
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



QS5. Do you consider yourself to be: LGBT, Heterosexual, Prefer not to answer

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DEMOGRAPHICS – AVERAGE NUMBER OF LONG DISTANCE OVERNIGHT TRIPS IN PAST 12 MONTHS



Q1. How many overnight leisure trips of 500 miles or more have you taken by air in the past 12 months?

DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

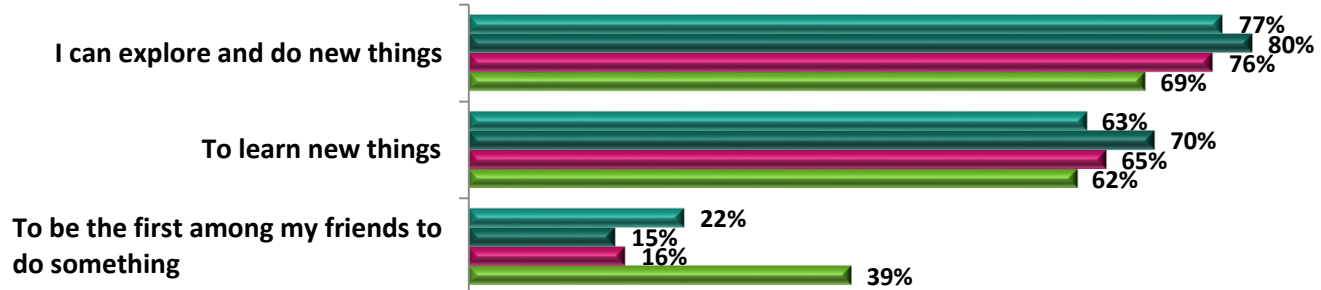
Eastern U.S.	Western U.S.	Canada	Japan
1. Florida (36%)	1. Hawai'i (44%)	1. Hawai'i (34%)	1. Hawai'i (33%)
2. Caribbean (35%)	2. Alaska (26%)	2. Europe (34%)	2. Europe (31%)
3. California (31%)	3. Las Vegas (26%)	3. Mexico (33%)	3. Australia (29%)
4. Hawai'i (24%)	4. Other Europe (24%)	4. California (31%)	4. Taiwan (25%)
5. Other Europe (22%)	5. Caribbean (23%)	5. Caribbean (26%)	5. Singapore (17%)
6. U.K. (21%)	6. Mexico (23%)	6. Las Vegas (23%)	6. Hong Kong (14%)
7. Italy (19%)	7. U.K. (21%)	7. Florida (15%)	7. Korea (13%)
8. Las Vegas (18%)	8. Italy (19%)	8. Arizona (14%)	8. Thailand (11%)
9. France (17%)	9. France (17%)	9. Australia (11%)	9. Guam/Saipan (9%)
10. Mexico (14%)	10. Australia (16%)	10. Other (25%)	10. China (9%)
11. Germany (11%)	11. Germany (15%)	No Trip Considered (4%)	11. Other (9%)
12. Costa Rica (10%)	12. Costa Rica (13%)		No Trip Considered (6%)
13. Switzerland (10%)	13. Switzerland (10%)		
14. Cuba (5%)	14. Other (20%)		
15. Puerto Rico (4%)	No Trip Considered (5%)		
16. Other (24%)			
No Trip Considered (4%)			

Q3: Please indicate which of the following destinations you are considering for your next leisure vacation, including those that you might visit on a cruise.

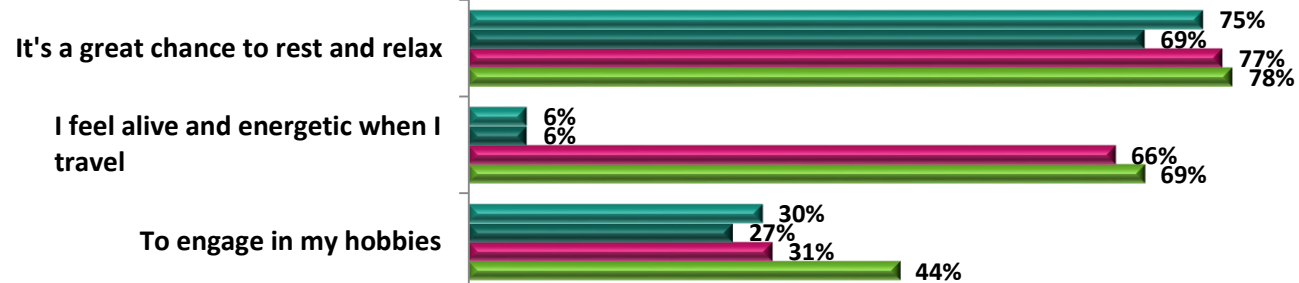
REASONS FOR TAKING A LEISURE VACATION ANYWHERE (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

EXPLORE/LEARN



RELAX/RE-ENERGIZE



CULTURE/AUTHENTICITY



Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

REASONS FOR TAKING A LEISURE VACATION ANYWHERE (CONT.) (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

ACTIVITY/
NATURE



FOODIE



TOGETHERNESS

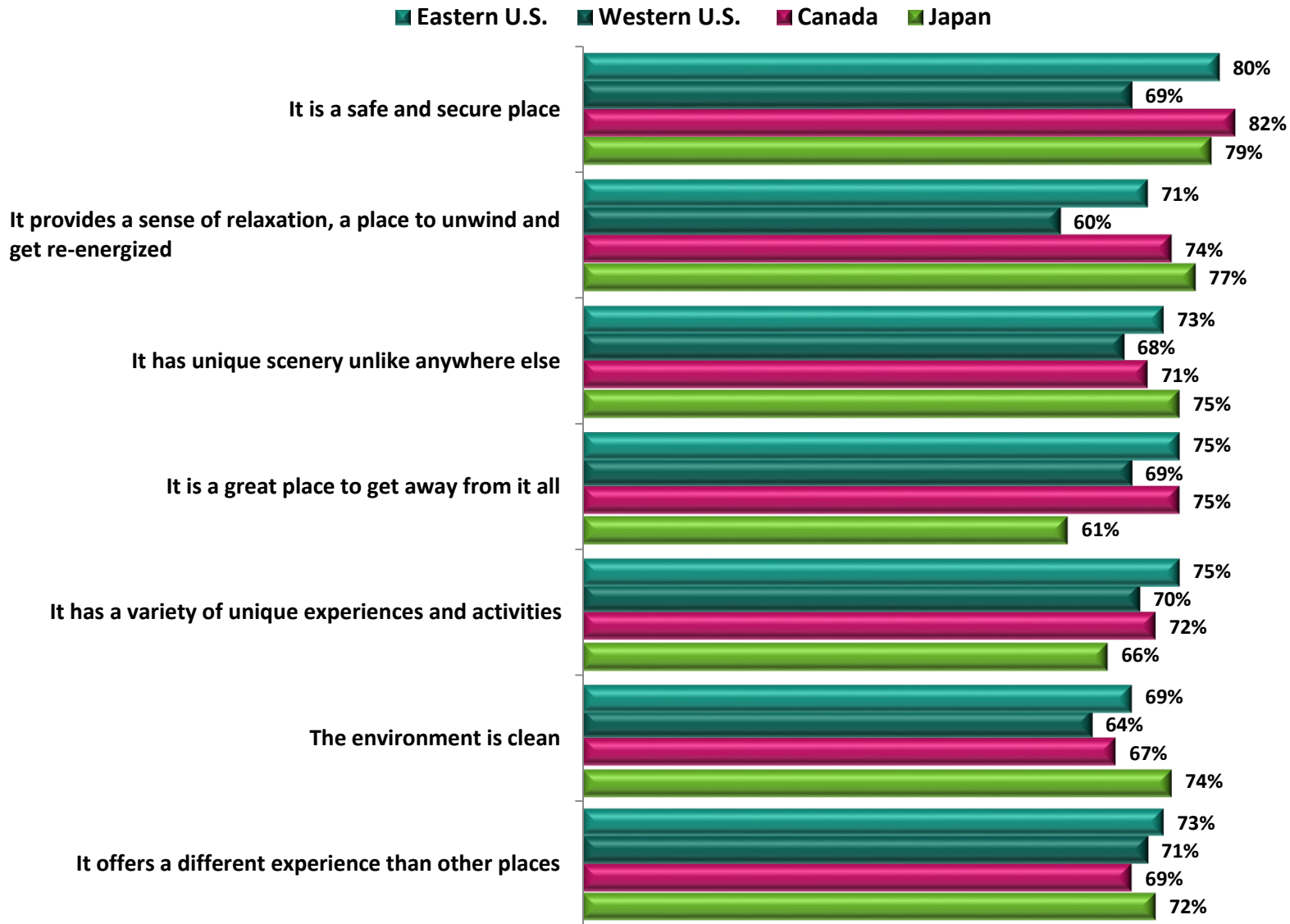


INDULGE



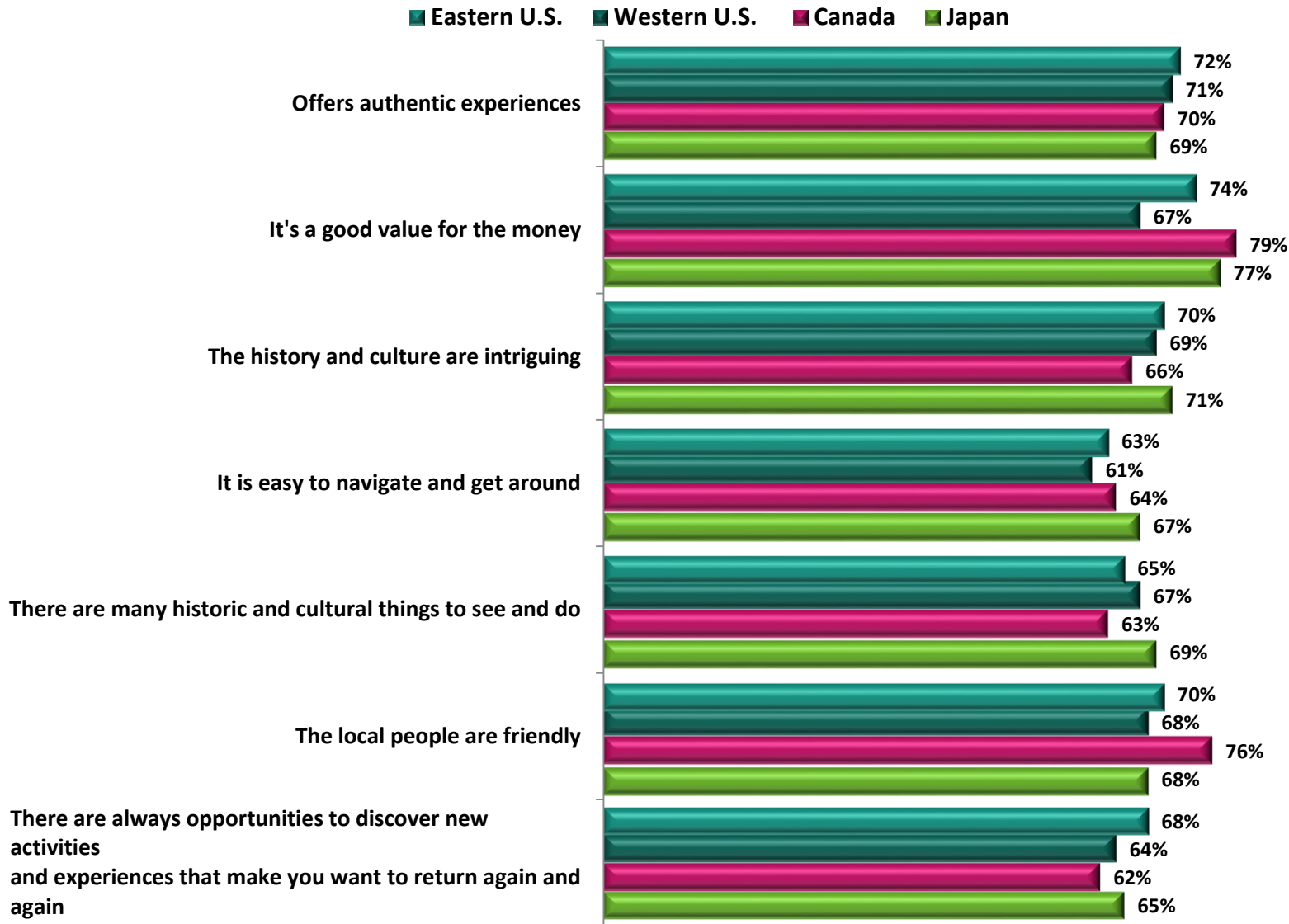
Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)



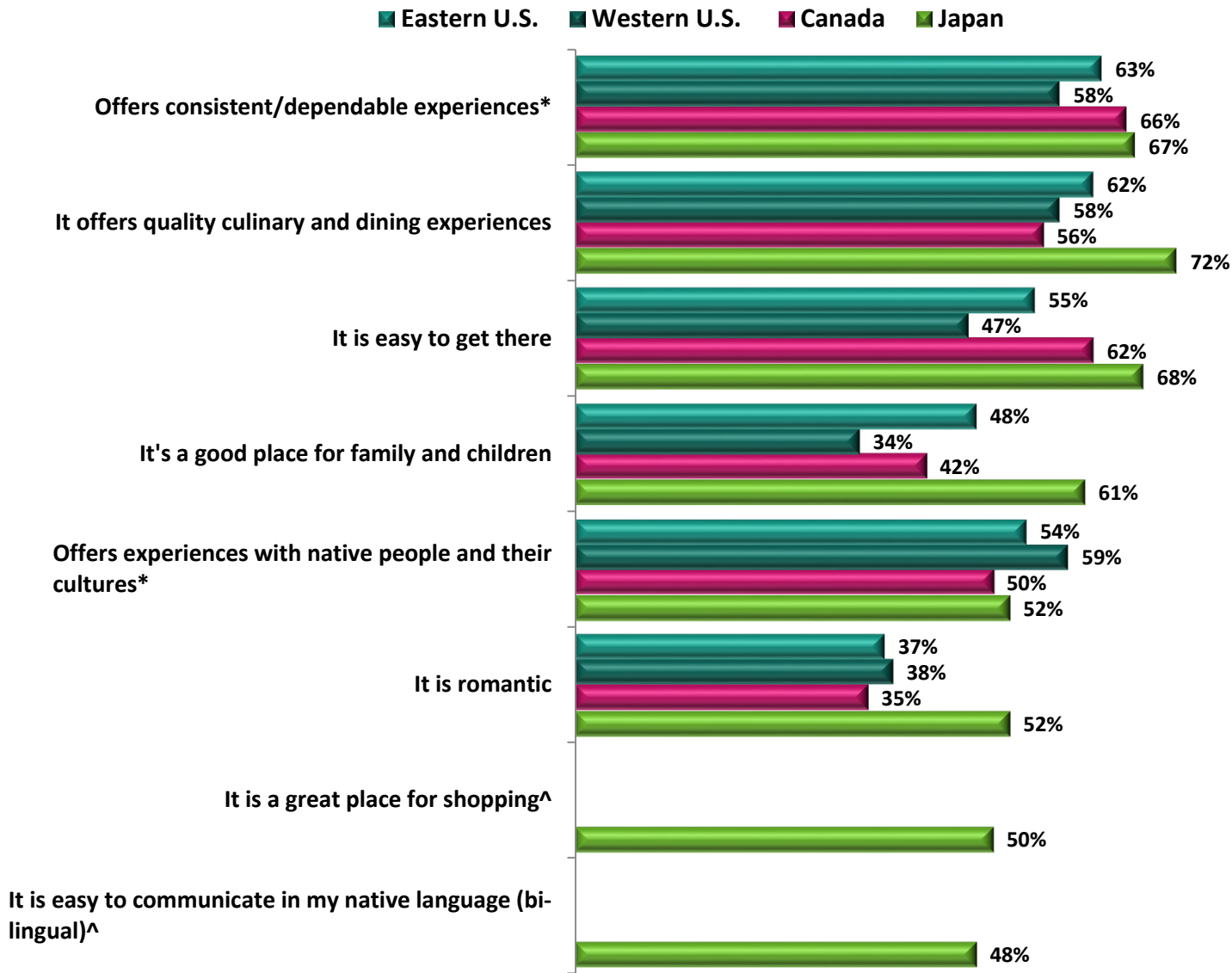
Q5a: Please indicate how important each of the following attributes is to you when selecting a leisure destination using the importance scale below. (1=Not at all Important, 5=Extremely Important)

ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



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

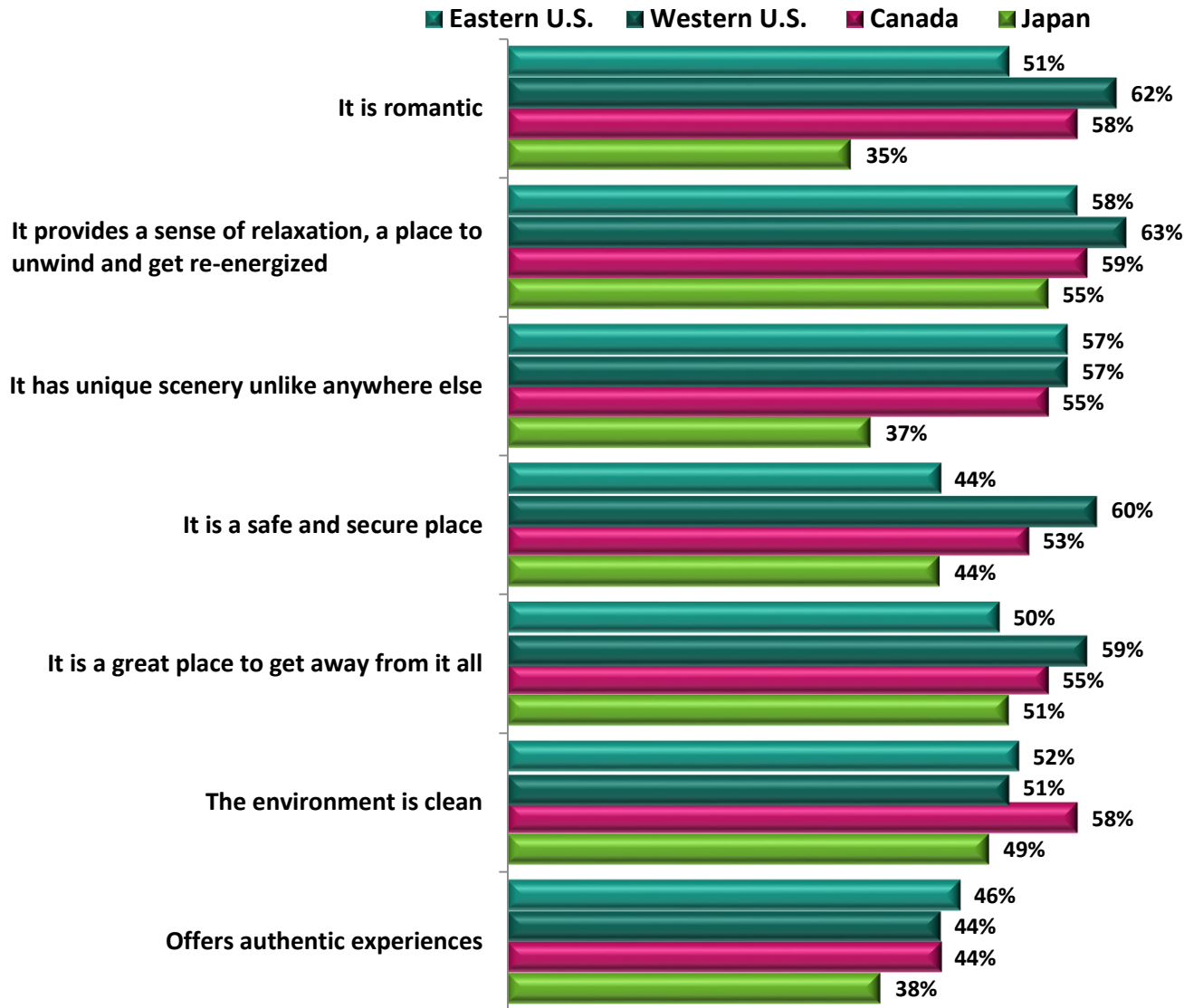
ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



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

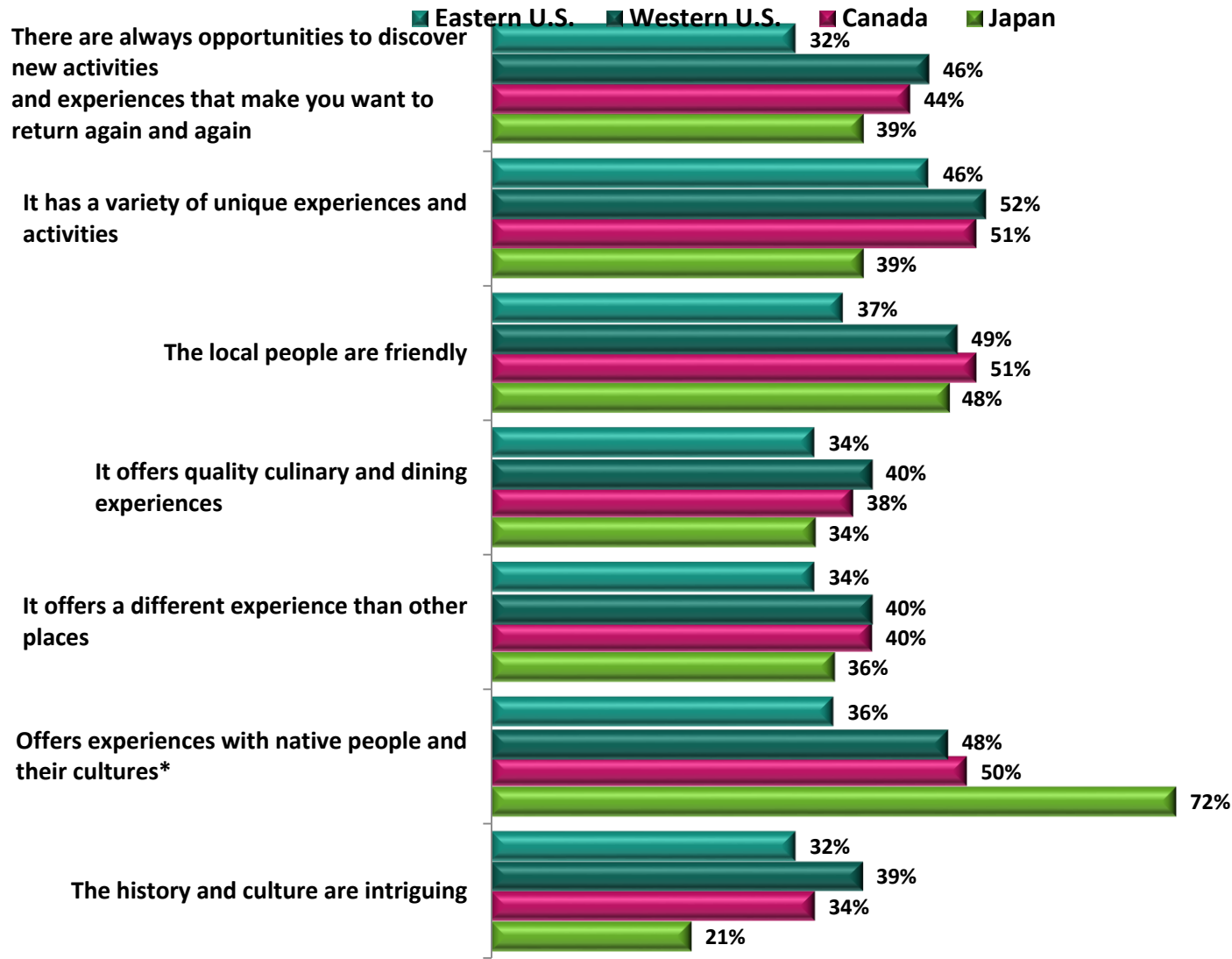
^Asked of Japan Only * Added in NOV 2015

HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (% TOP 2 BOX)



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

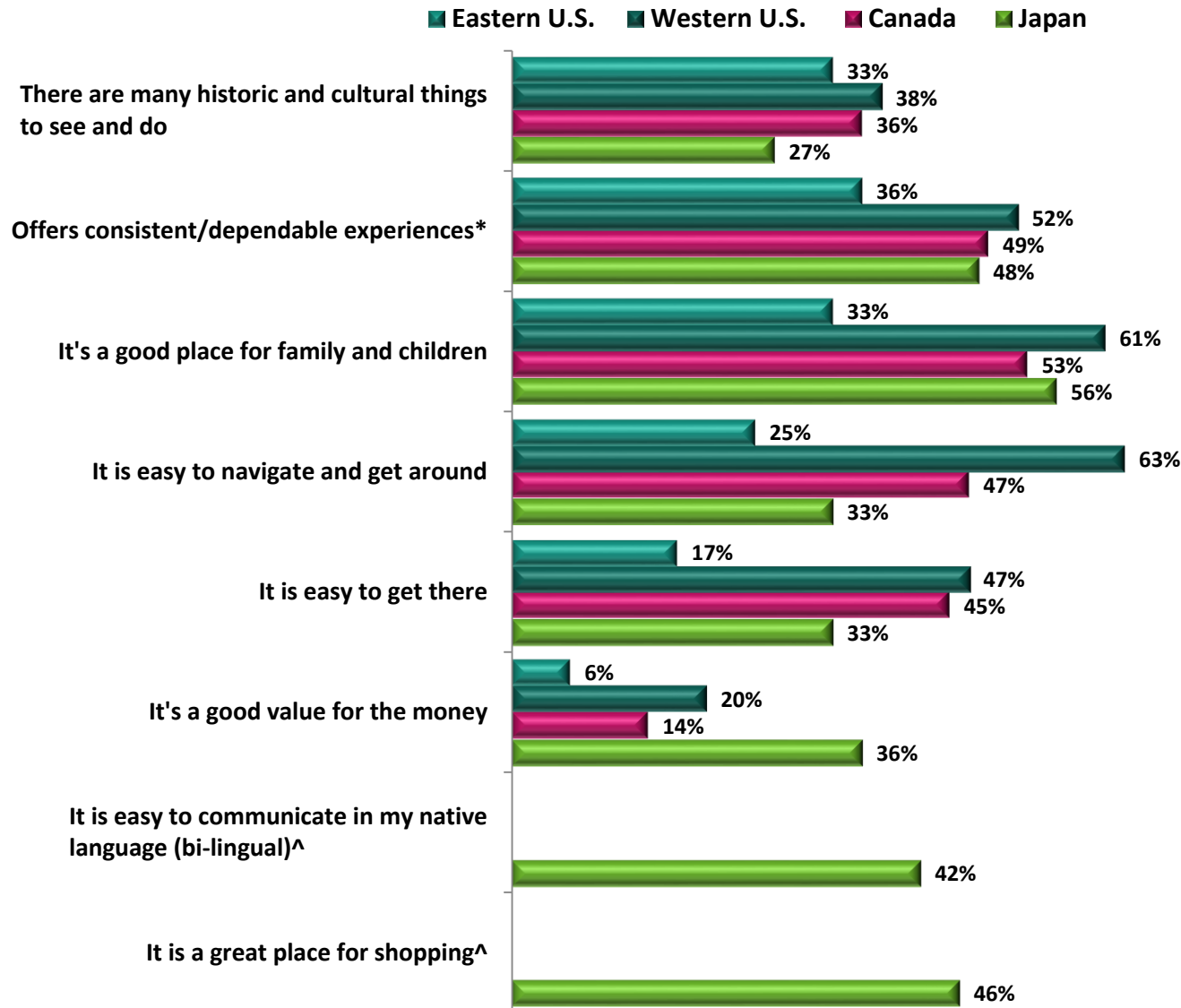
HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



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

* Added in NOV 2015

HAWAII PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



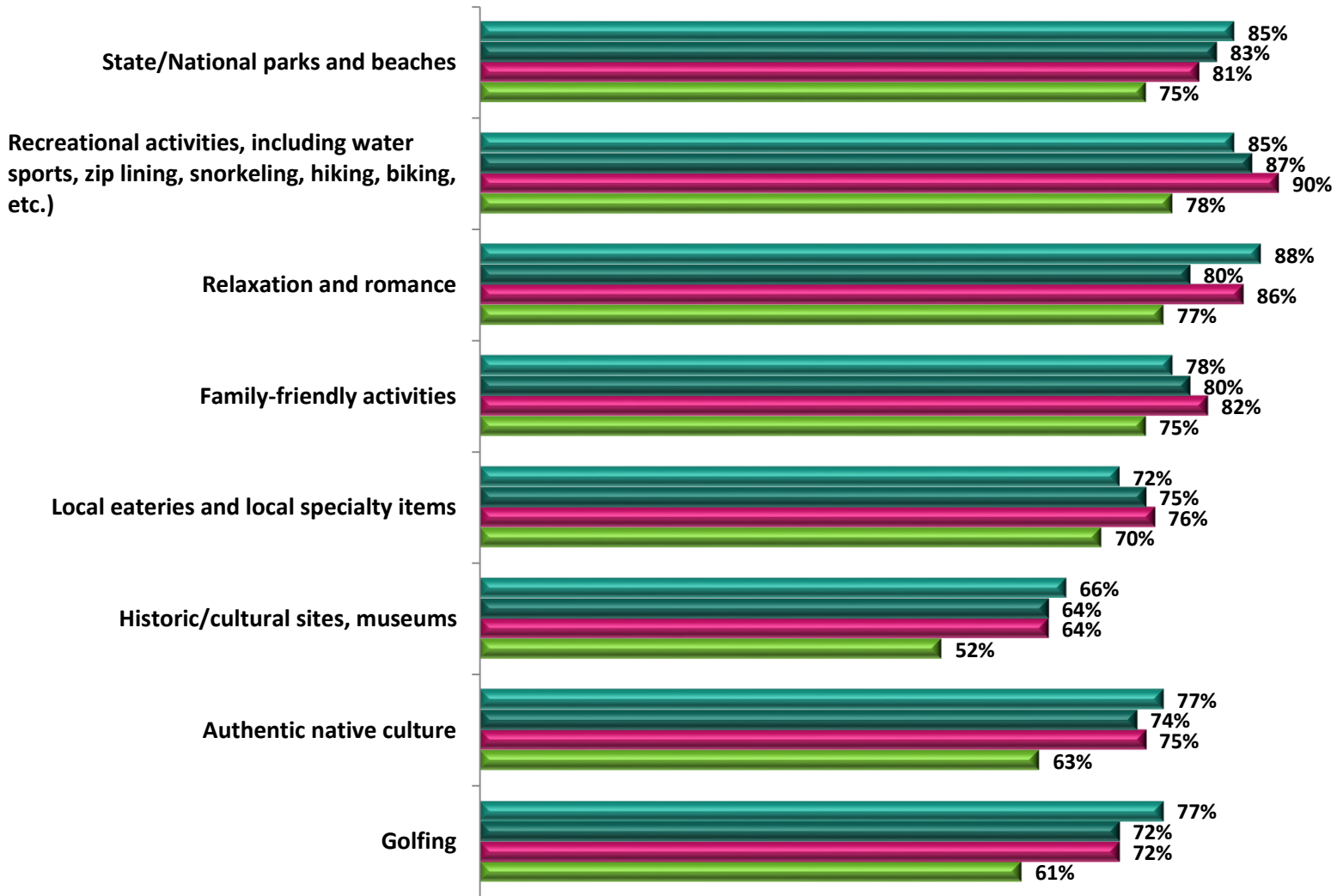
Q6a: For each attribute, please select the destination(s) to which it applies.

^ Asked of Japan Only

* Added in NOV 2015

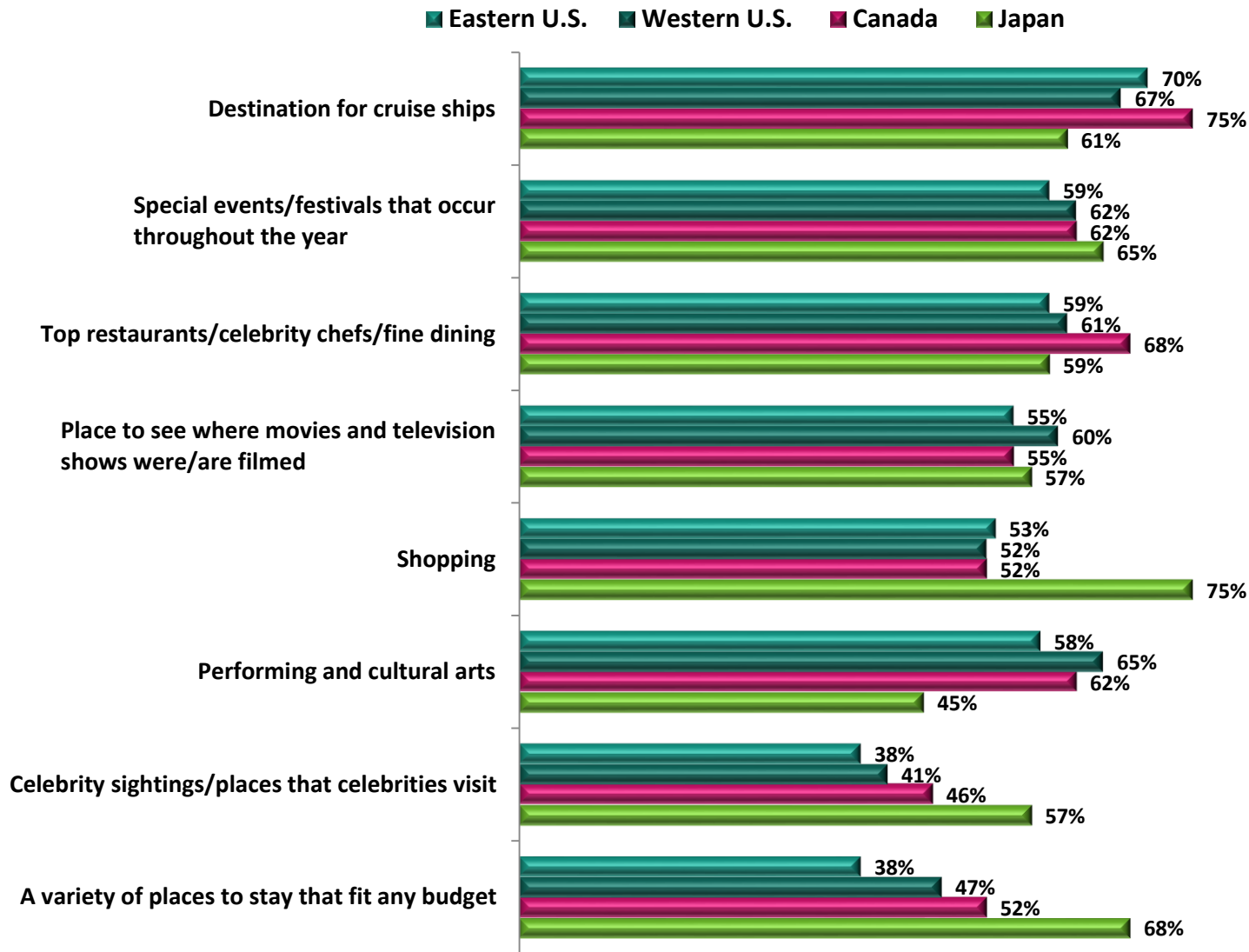
IMPRESSION OF HAWAI'I (% TOP 2 BOX)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

IMPRESSION OF HAWAI'I (CONT.) (% TOP 2 BOX)



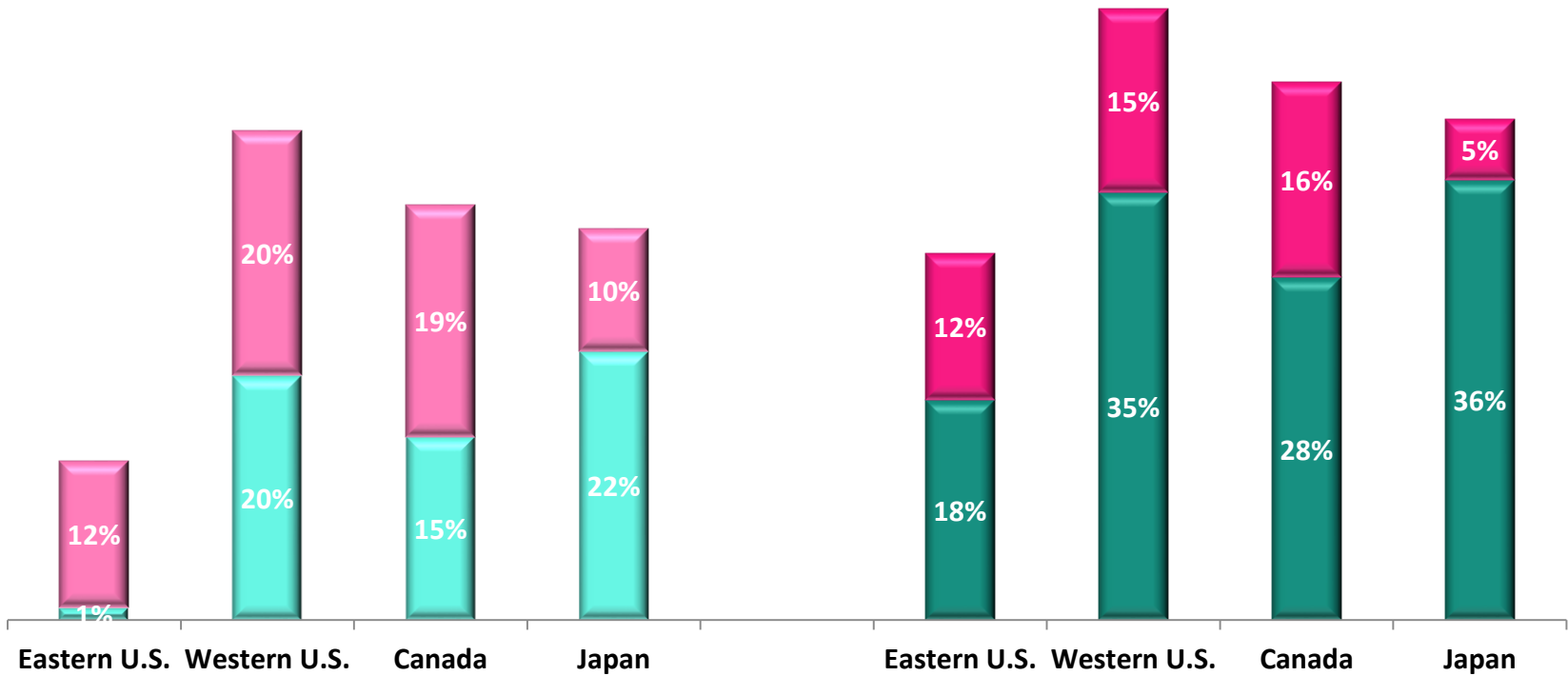
Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

HAWAI'I VISITATION FREQUENCY

- Visited Past 12 Months
- Visited Past 13-36
- Plan to Visit Next 12 Months
- Plan to Visit Next 13-24 Months

Visited Past 36 Months

Plan to Visit Next 24 Months

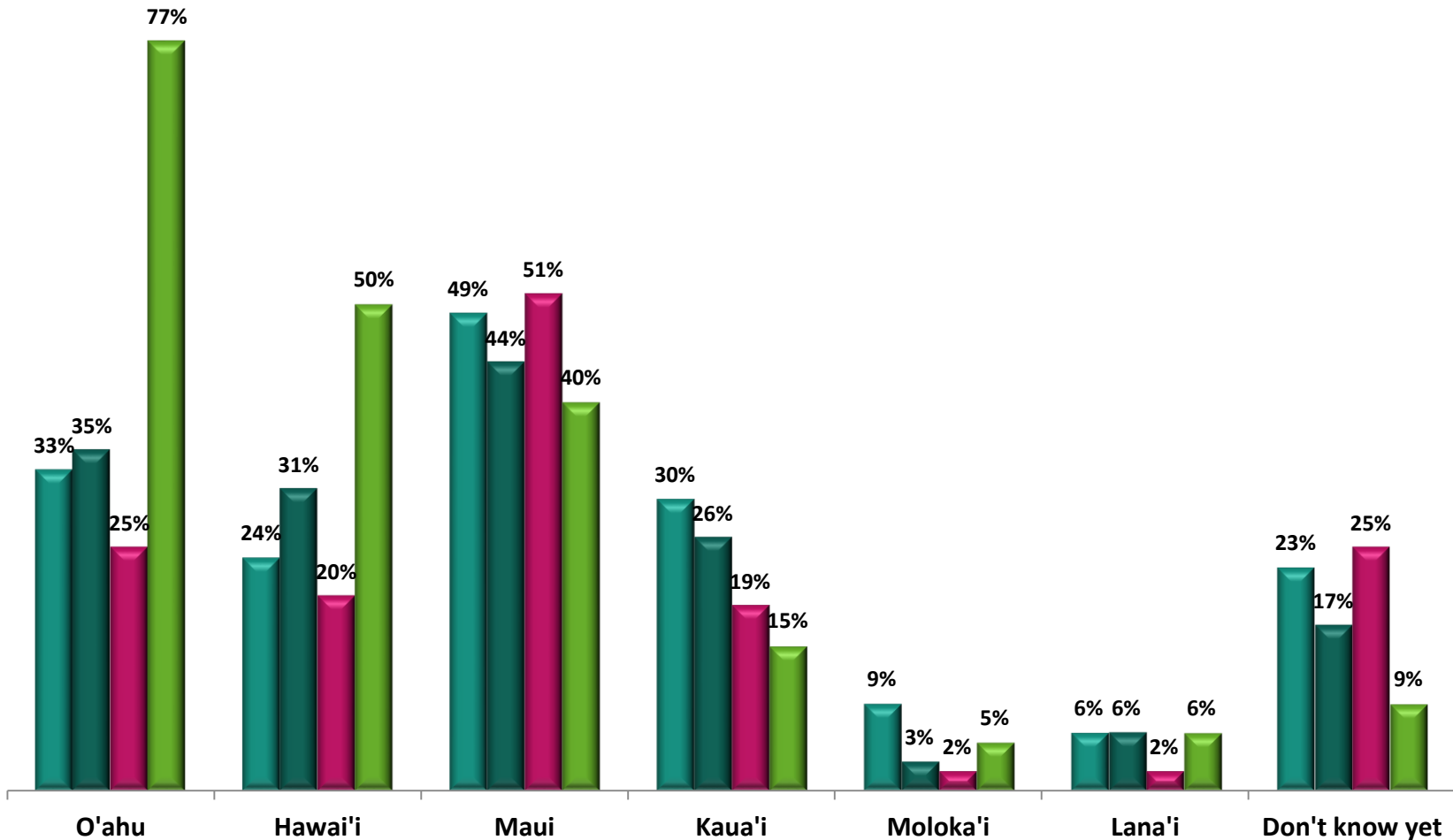


Q8a/b: Please indicate whether or not you visited each of the following destinations for leisure within the PAST 3 YEARS/PAST 12 MONTHS.

Q9a/b: Please tell us for each of the following destinations whether or not you plan to visit them for leisure within the NEXT 24 MONTHS/NEXT 12 MONTHS.

PLANNED VISITATION TO ISLANDS OF HAWAI'I (AMONG THOSE PLANNING TO VISIT IN NEXT 24 MONTHS)

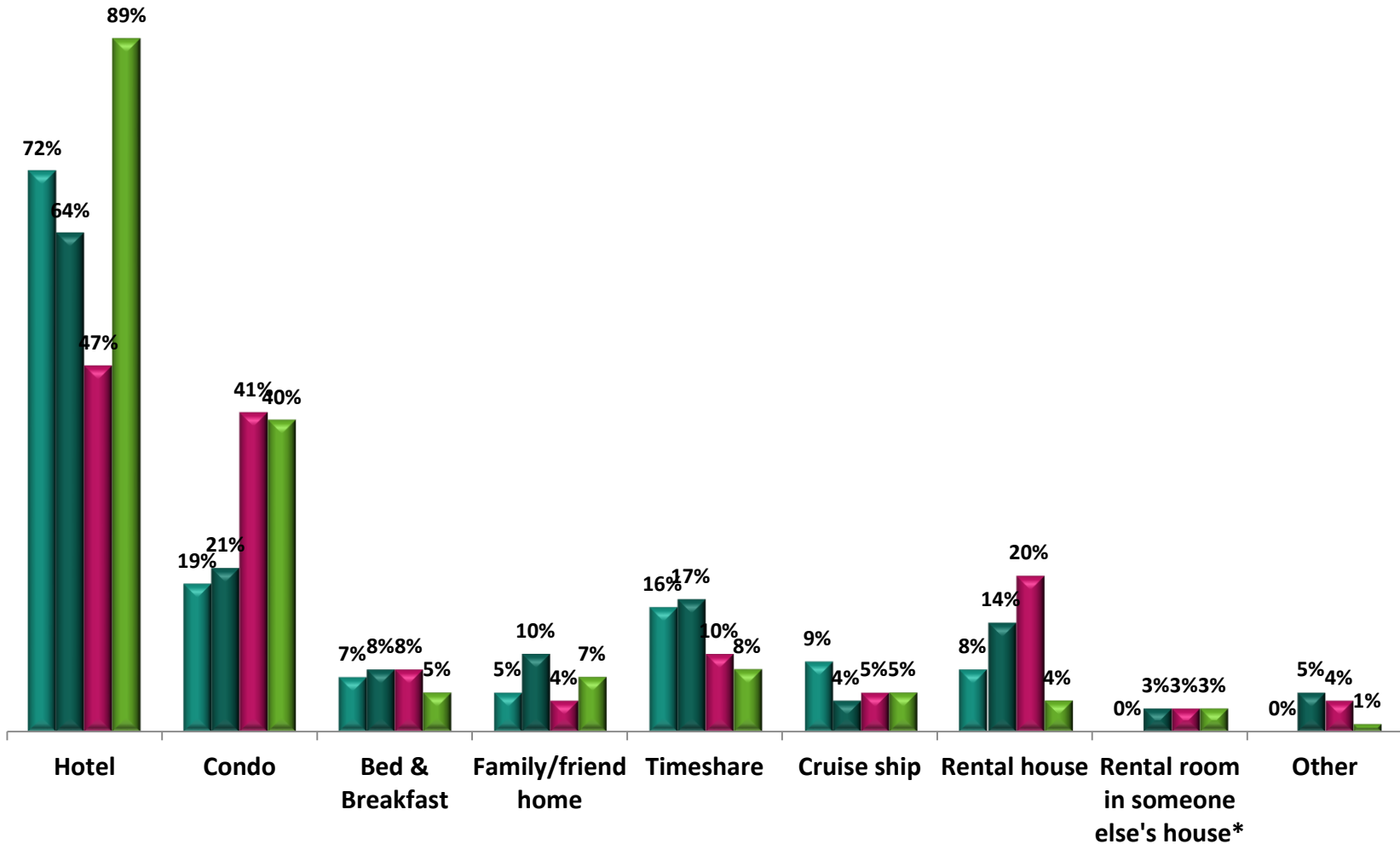
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q9c: You indicated that you are planning to visit Hawai'i in the next 24 months. Which islands do you plan to visit?

PLANNED ACCOMMODATIONS (AMONG THOSE PLANNING TO VISIT HAWAII IN NEXT 24 MONTHS)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

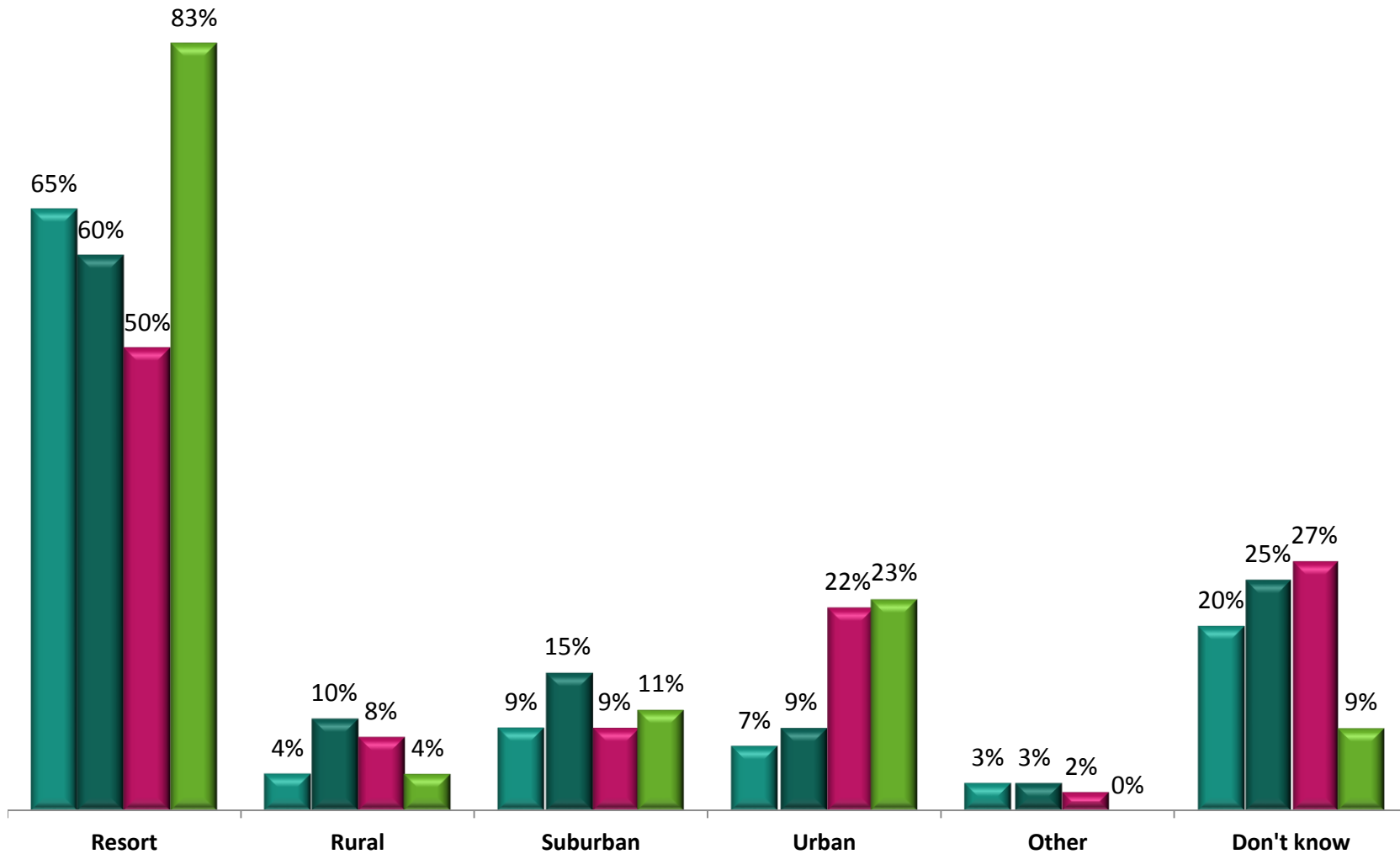


Q9d: You indicated that you are planning to visit Hawai'i in the next 24 months. What type of accommodation(s) do you plan to stay?

*Asked starting in MAR 2015

PLANNED ACCOMMODATION LOCATION (AMONG THOSE PLANNING TO VISIT HAWAII IN NEXT 24 MONTHS)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

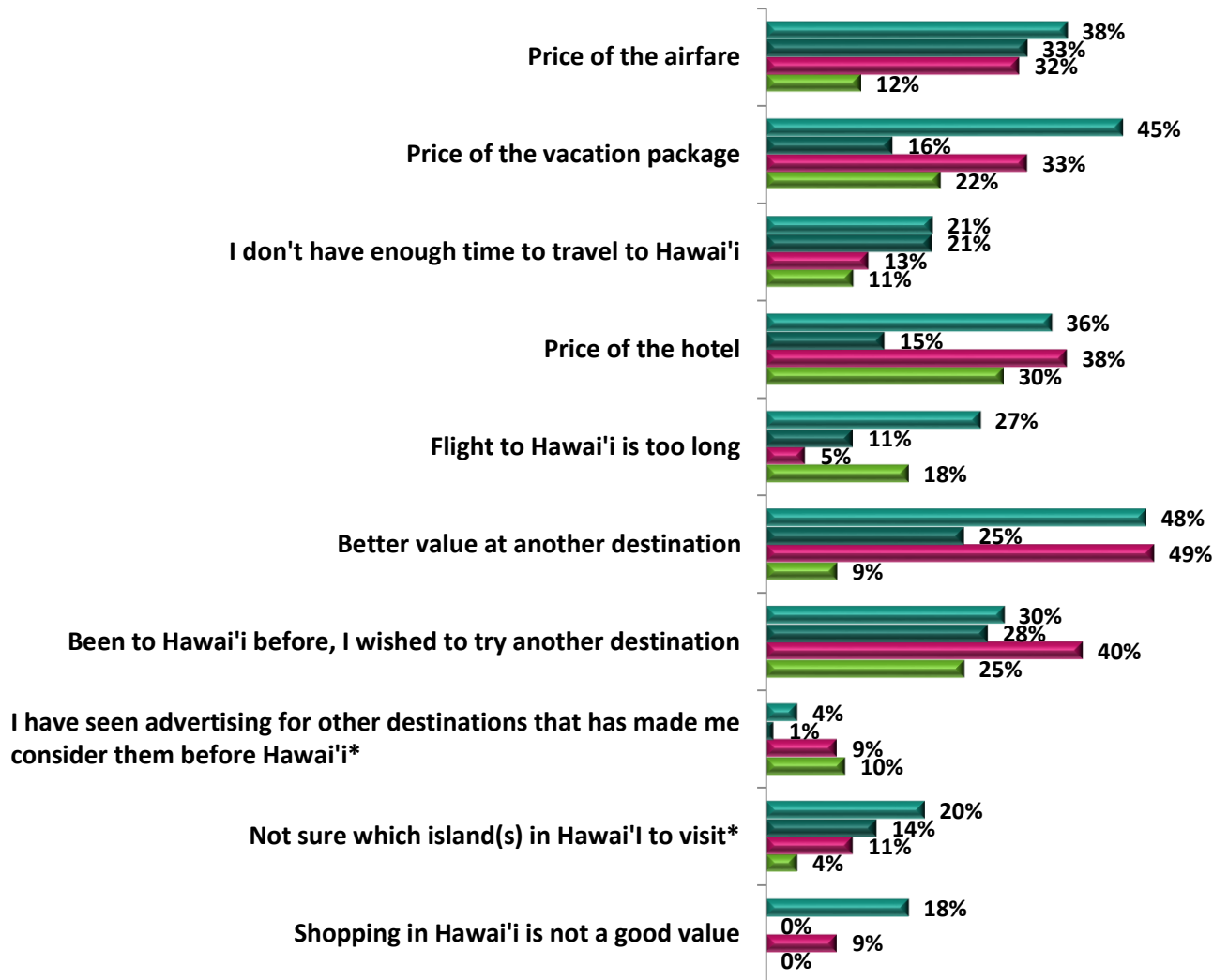


Q9E. You indicated that you are planning to visit Hawai'i in the next 24 months. What type of area do you plan to stay in?

Note: Question not asked in NOV 2014

REASONS FOR NOT VISITING HAWAII (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan

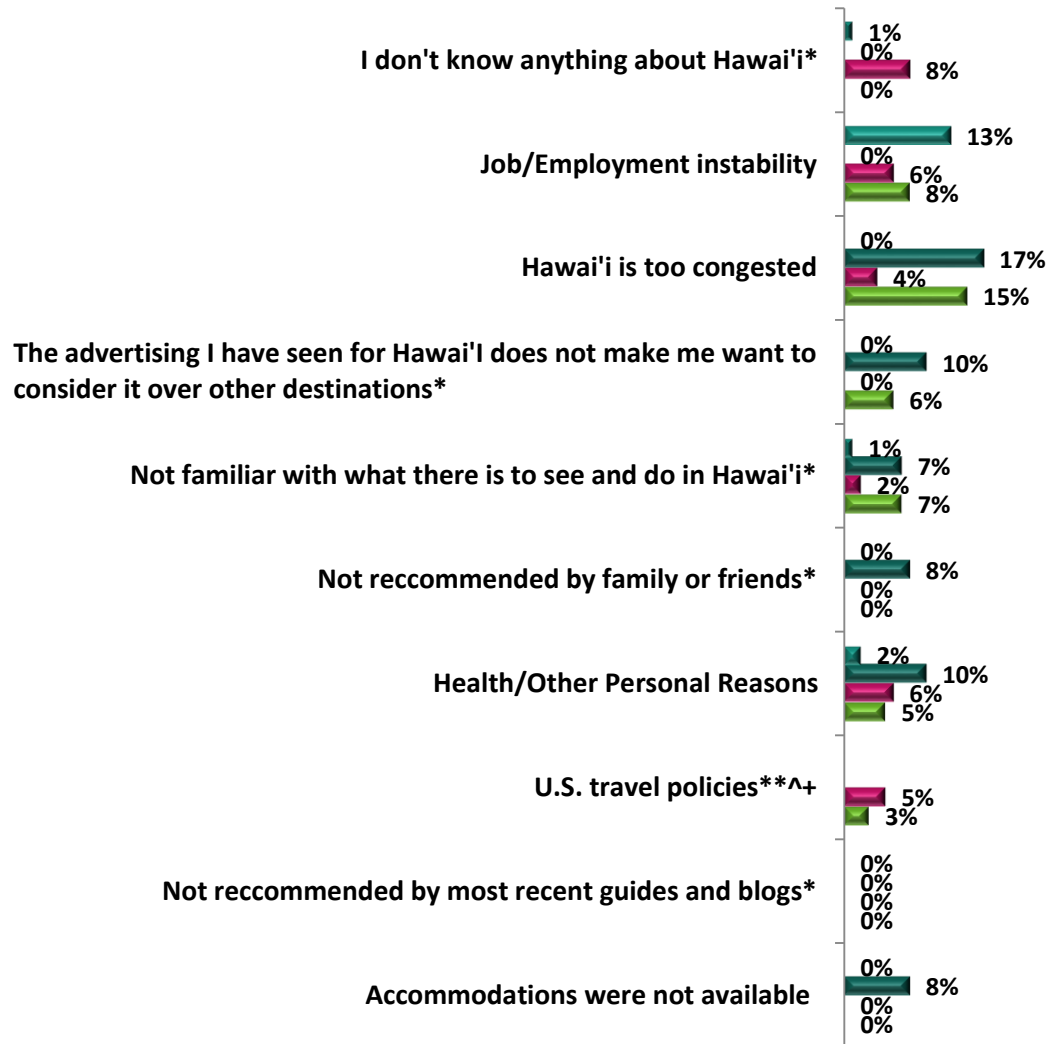


Q10: Earlier you indicated that you had considered Hawaii for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawaii in the next 24 months?

Note: Sample sizes for this question are very small; use data with proper caution

REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



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

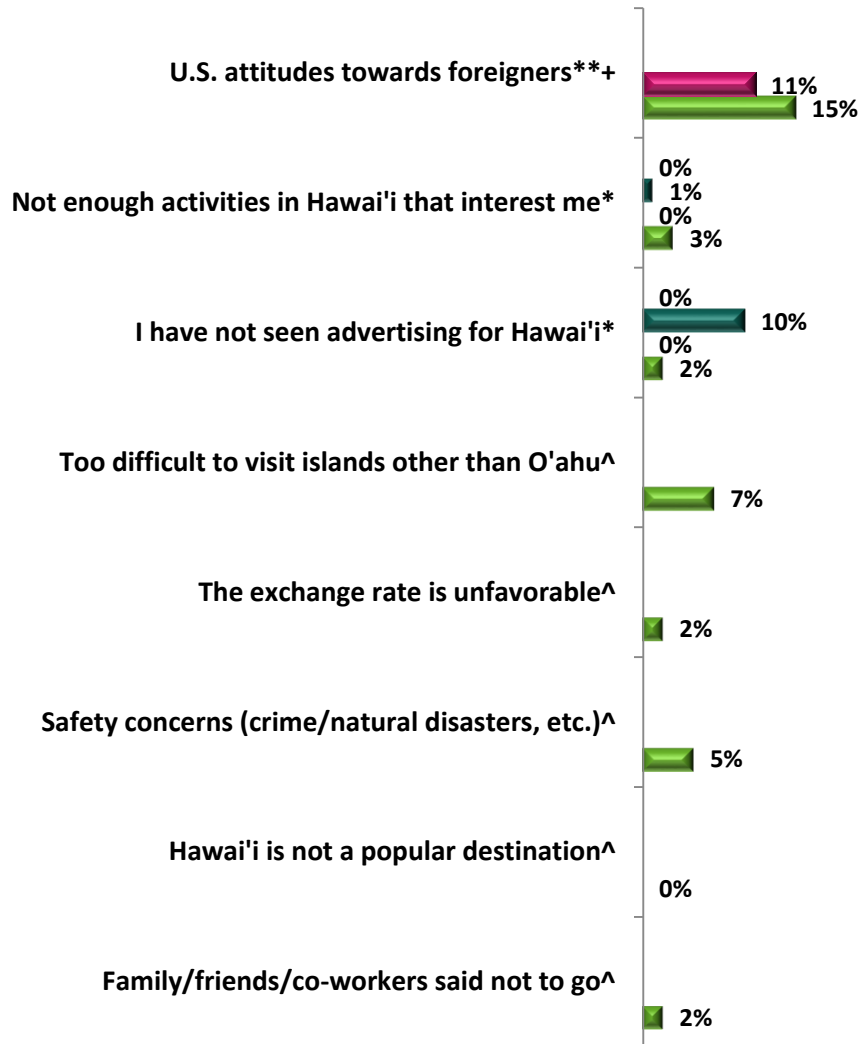
³⁵ *Asked starting in DEC 2016 **Asked starting in MAR 2017 ^Only asked of the Japanese Market +Only asked of the Canadian Market

Note: Sample sizes for this question are very small; use data with proper caution



REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



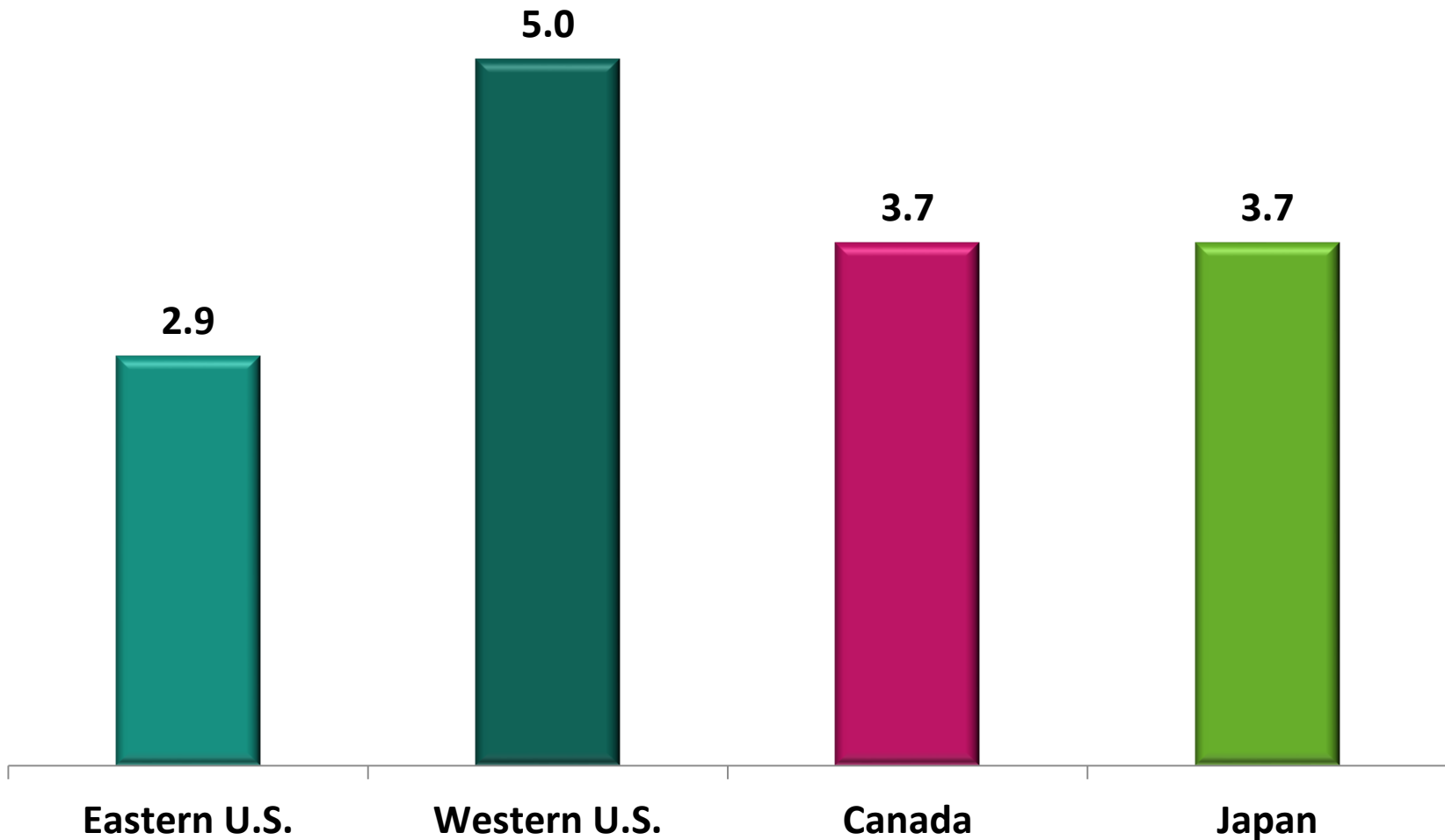
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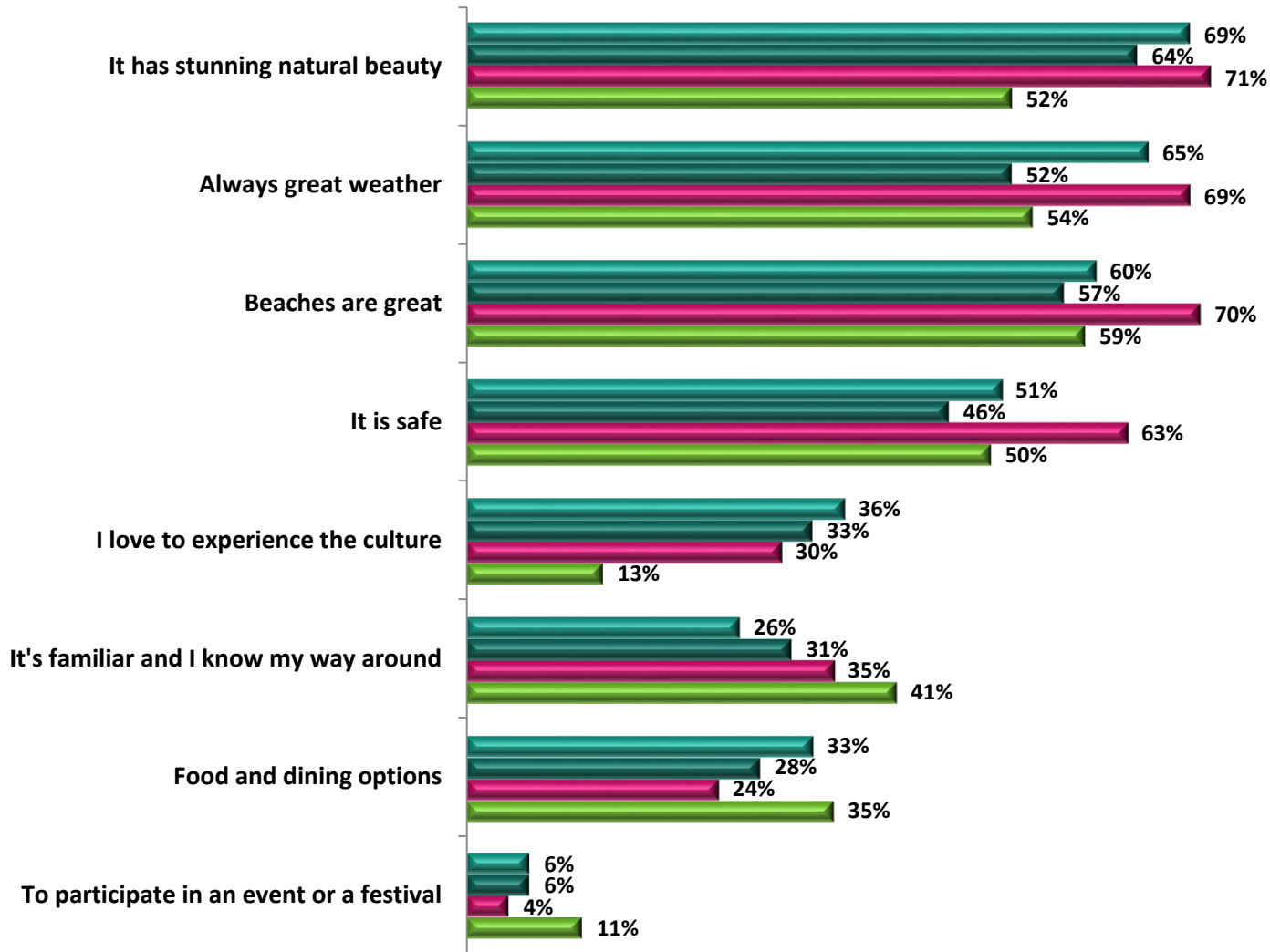
AVERAGE LIFETIME VISITS TO HAWAI'I (AMONG THOSE VISITING 1+ TIMES)



Q11: How many times have you visited Hawai'i in your lifetime?

REASONS FOR RETURNING TO HAWAII (AMONG THOSE VISITING HAWAII 2+ TIMES)

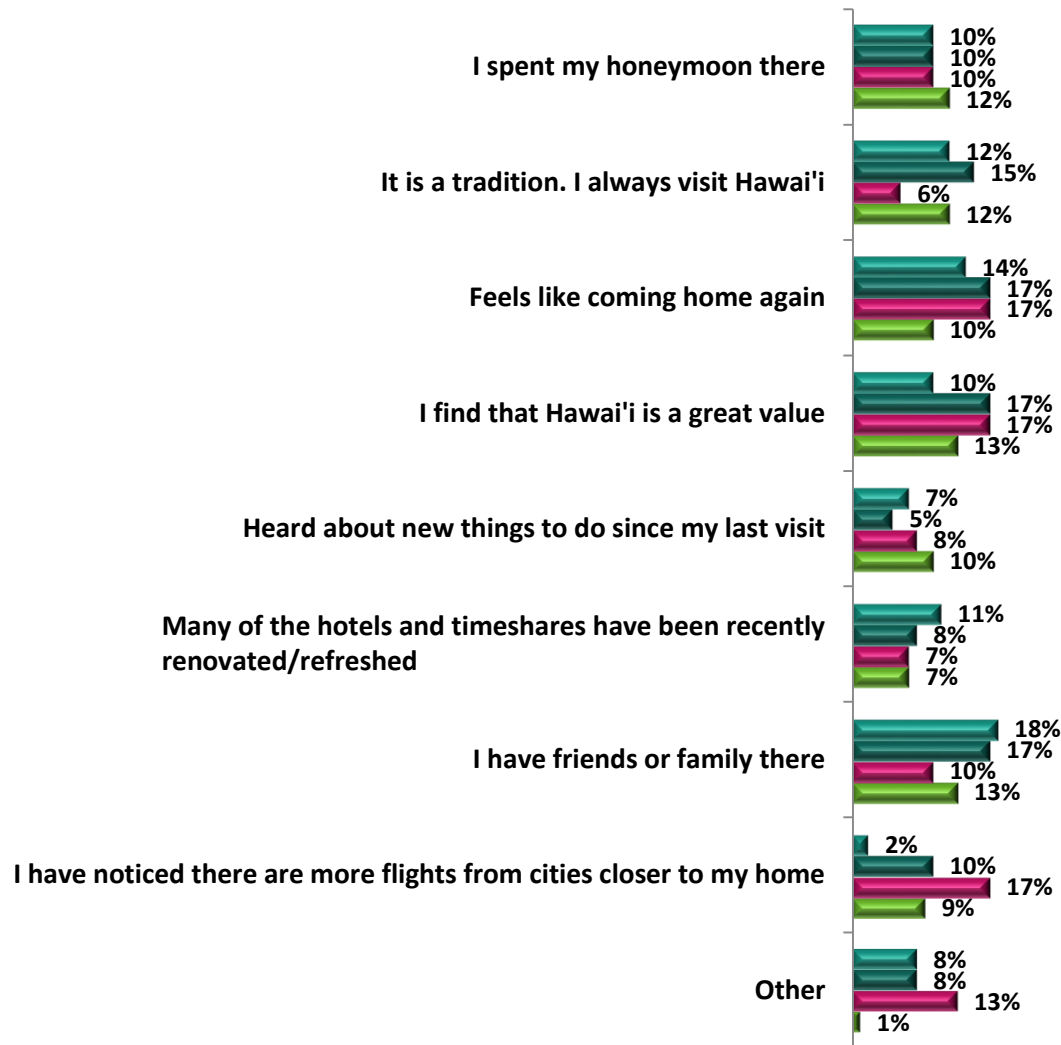
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q12: Which of the following reasons best explains why you keep returning to Hawaii?

REASONS FOR RETURNING TO HAWAI'I (CONT.) (AMONG THOSE VISITING HAWAI'I 2+ TIMES)

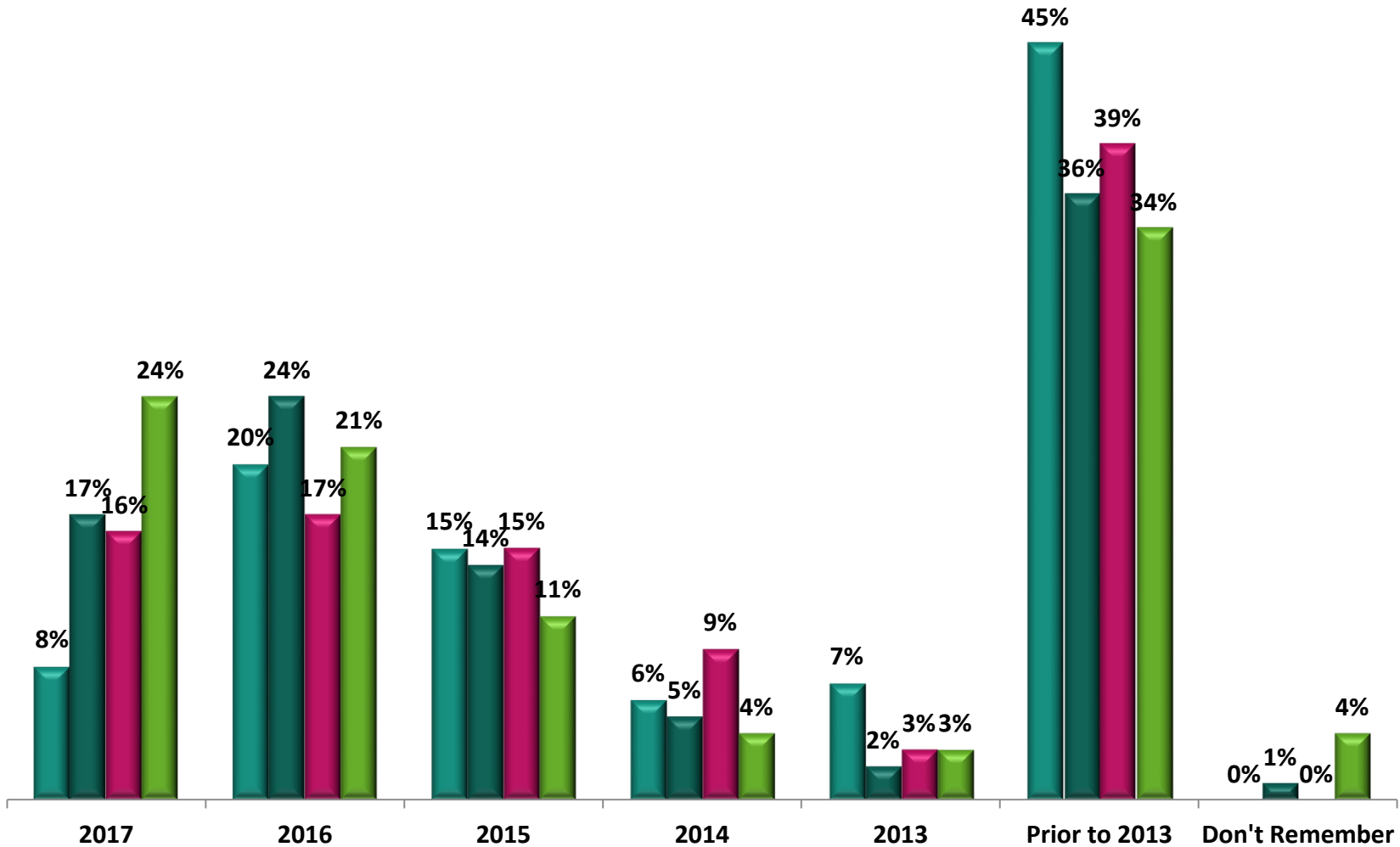
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q12: Which of the following reasons best explains why you keep returning to Hawai'i?

YEAR LAST VISITED HAWAI'I

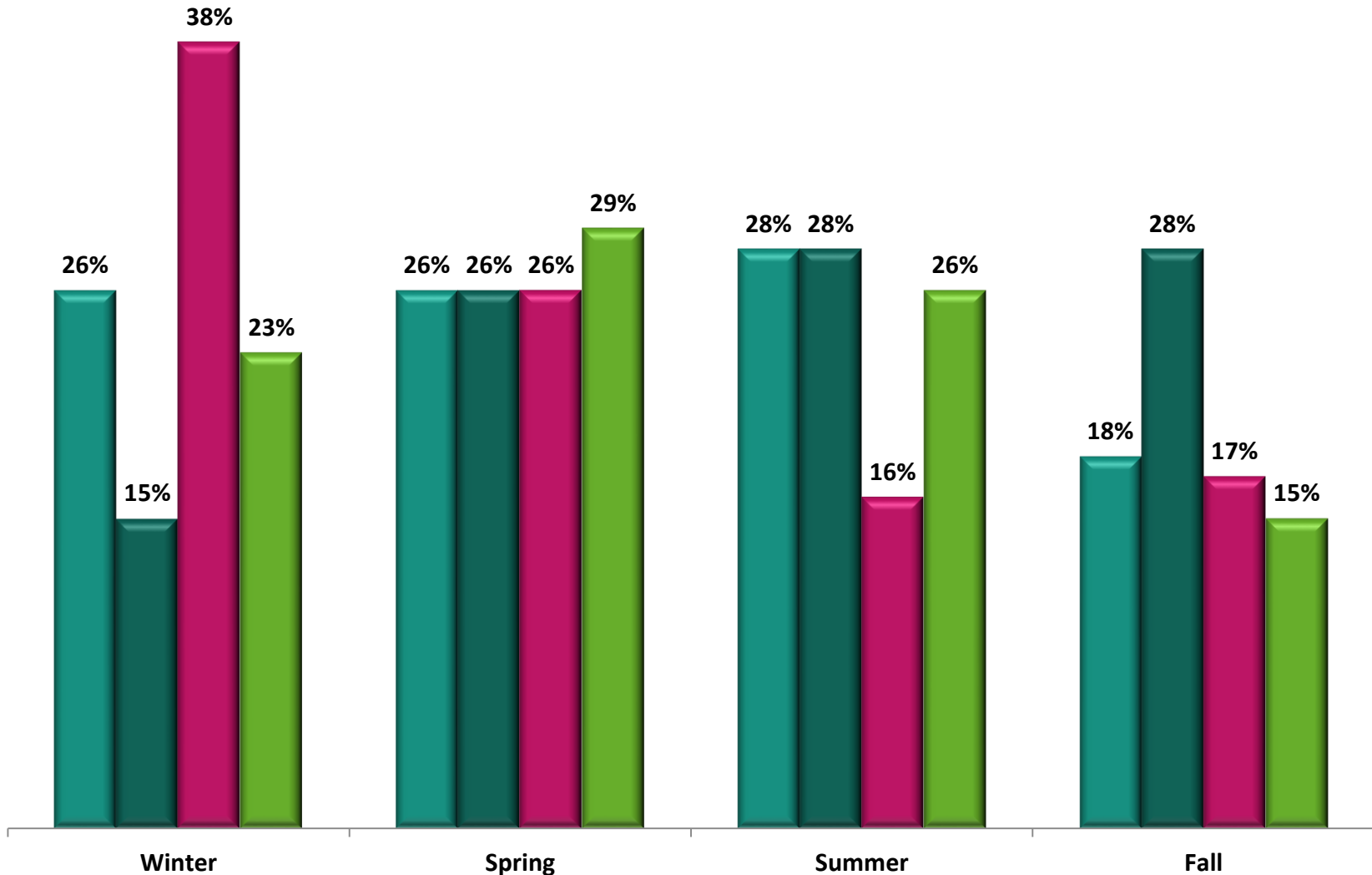
■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



Q13a: What was the YEAR of your LAST VISIT to Hawai'i?

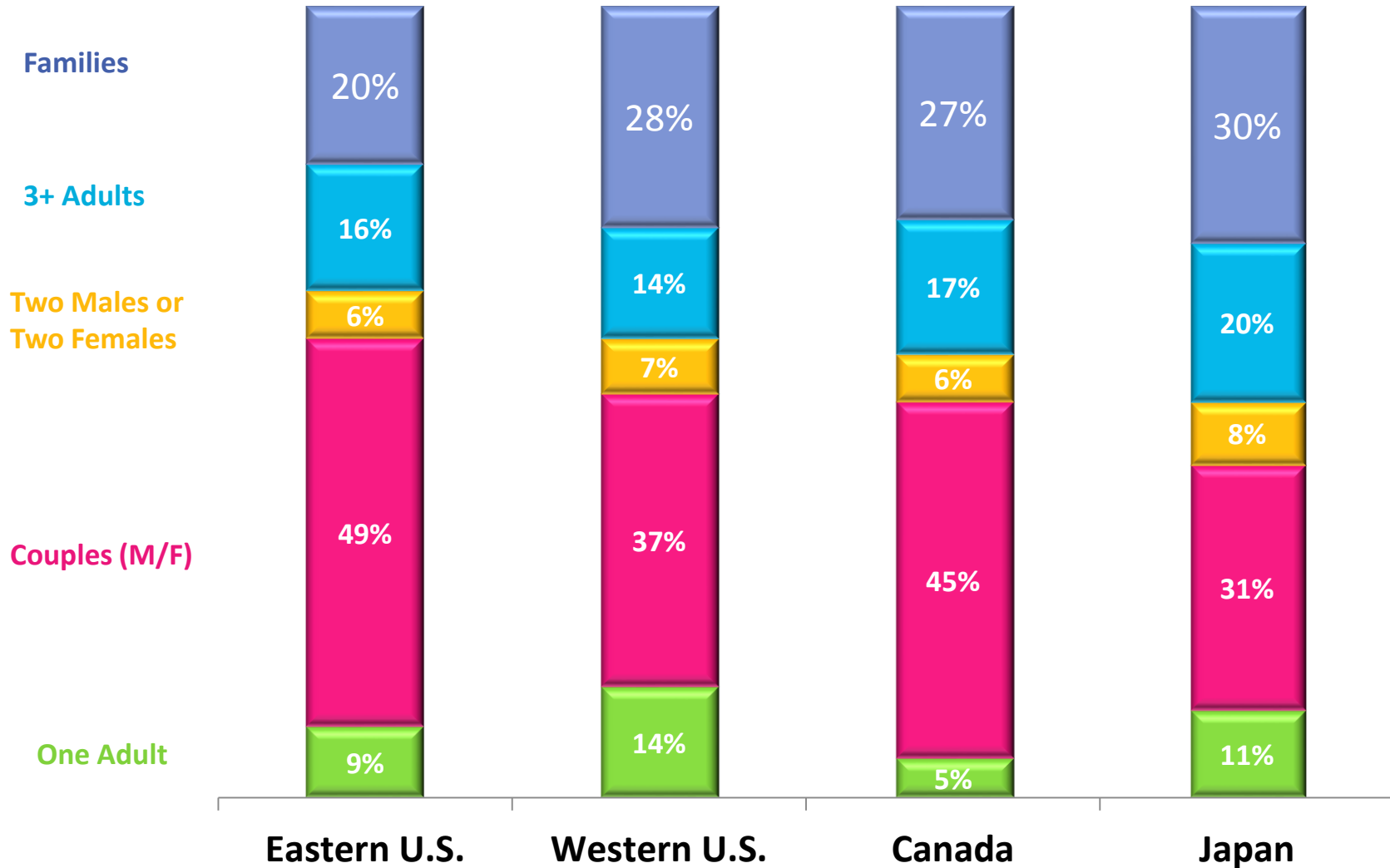
SEASON LAST VISITED HAWAII

■ Eastern U.S. ■ Western U.S. ■ Canada ■ Japan



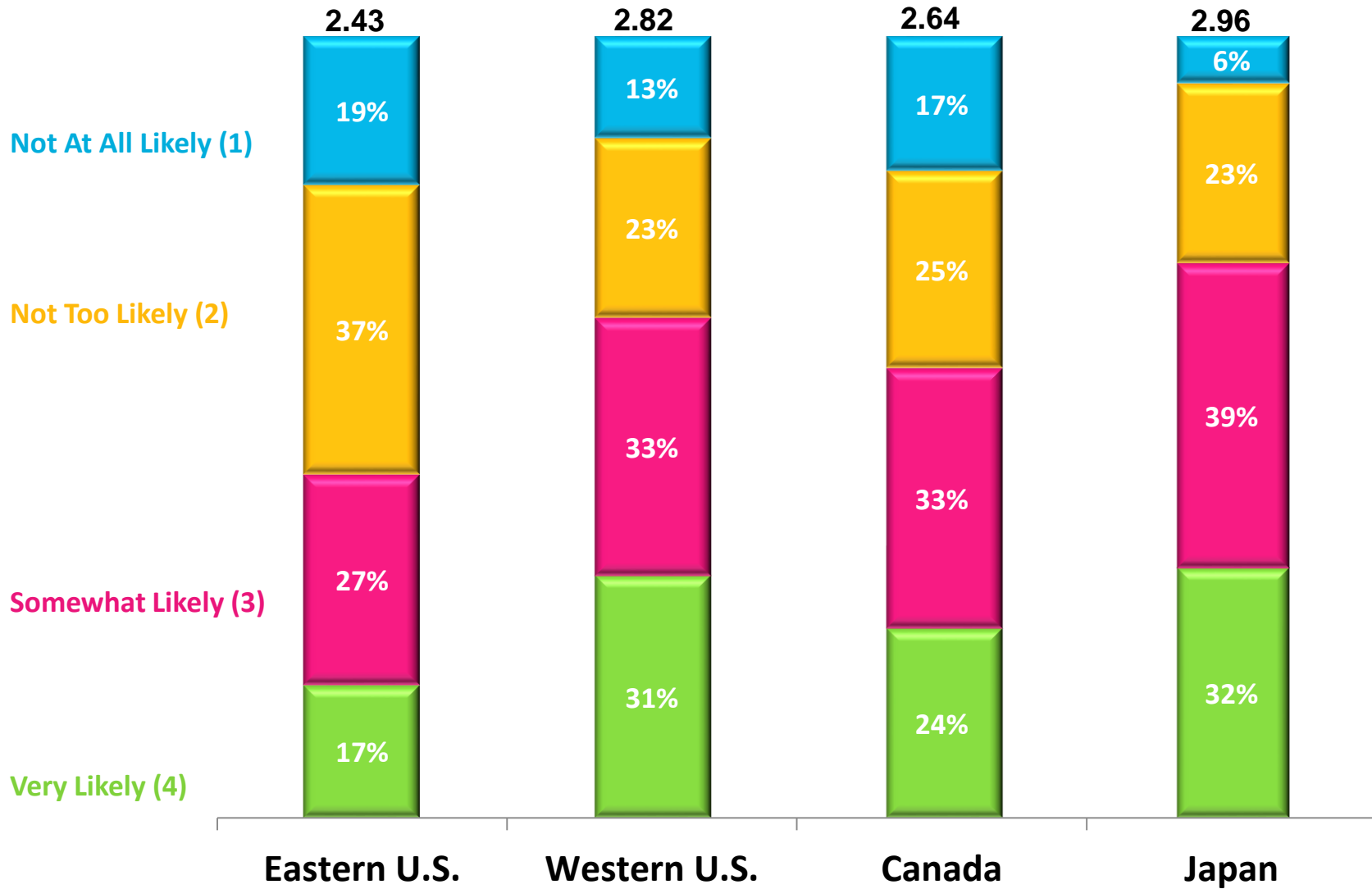
Q13b: What was the MONTH of your LAST VISIT to Hawai'i?

TRAVEL PARTY COMPOSITION (SHARE)



Q16c: Including yourself, how many people were in your travel party on your most recent leisure trip to Hawai'i?

LIKELIHOOD OF RETURNING TO HAWAI'I IN NEXT 24 MONTHS (%; MEAN)



Q18: In the next 24 months how likely are you to take a vacation or pleasure trip to Hawai'i?