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# Hawai'i Tourism Authority

## Marketing Effectiveness Study

January – June 2019

Wave 3 Report

*External*



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# Marketing Effectiveness Study Objectives

- Hawai'i welcomed nearly 10.3 million visitors in 2019.
- With \$18 billion in-destination spending and 216,000 jobs supported, the travel industry is a vital component of Hawai'i's economy, accounting for over \$2 billion in tax revenues for the state
- The Hawai'i Tourism Authority seeks to measure:
  - The impact of its Global Marketing Contractor's Integrated Marketing Campaigns and their effect on awareness of Hawai'i as a destination, including brand perceptions and intent to visit among major market areas
  - How Hawai'i ranks among its competitive set
  - Target audience behaviors, attitudes, and motivators towards travel



## Executive Highlights – North America Travel Characteristics

## US West &amp; US East

- **Reasons for Vacationing:** Both US West (USW) and US East (USE) residents are more likely to take a vacation to explore and do new things, spend quality time with their spouse/family, and rest and relax,
- **Previous Hawai'i Visits:** Four in ten USW residents (42%) have visited Hawai'i in the past three years, more than any other competitor destination. Hawai'i ranks fifth as most visited destination for USE residents (20%), falling far behind major competitors like Florida (66%) and the Caribbean (37%).
- **Future Hawai'i Visits:** Among destinations USW residents are interested in visiting in the next two years, Hawai'i places well ahead of all other destinations at 54 percent. For USE residents, 47 percent say they are considering Hawai'i in the next two years, also ranking first among the competitive set.
- **Future Island Visits:** For those planning to visit Hawai'i in the next year, more than half of US residents (57%) plan to go to Maui, while 41 percent are planning to visit O'ahu, 39 percent plan to go to Island of Hawai'i, and 37 percent intend to go Kaua'i.
- **Never Been's:** USE residents are much more likely to have never visited Hawai'i before (45%), while 26 percent have visited just once. More than half of USW residents have visited more than twice. Only 20 percent of USW residents have never visited Hawai'i.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches are among the top reasons why both USW and USE residents continue to vacation in Hawai'i. Nearly half say they continue to return because Hawai'i is safe.
- **Future Accommodations:** Of those planning to visit in the next year, both USW and USE residents are most likely to use hotels, followed distantly by rental houses.

## Canada

- **Reasons for Vacationing:** Canadians see vacations as a time to rest and relax, explore/do new things, and spend quality time with their spouse/family.
- **Previous Hawai'i Visits:** Just 16 percent of Canadian residents have visited Hawai'i in the past three years, falling seventh in the competitive ranking. More than one third of Canadians have visited Europe, the Caribbean, or Florida in the past three years.
- **Future Hawai'i Visits:** Among destinations Canadians are interested in visiting in the next two years, Hawai'i falls in second at 45 percent, below Europe (54%). At the same time, just 16 percent of Canadian residents plan to visit Hawai'i in the next year, again ranking fifth among the competitive set.
- **Future Island Visits:** For those who are planning to visit, 55 percent plan to go to Maui, while 33 percent plan to go to O'ahu and 33 percent intend to visit the Island of Hawai'i.
- **Never Been's:** More than half of Canadian residents (57%) have never visited Hawai'i before, while 26 percent have visited once and 24 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, great weather, and beaches are among the top reasons why Canadians continue to vacation in Hawai'i. Four in ten say they continue to return because Hawai'i is safe and they love the culture.
- **Future Accommodations:** Of those planning to visit in the next year, 53 percent plan to stay in a hotel, followed distantly by bed and breakfast (24%), cruise ship (19%), and rental house (18%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the cost of vacation package and airfare rank among the top reasons not to visit, followed by price of hotel, better value at another destination, and an unfavorable exchange rate.

## Executive Highlights – Japan and Korea Travel Characteristics

## Japan

- **Reasons for Vacationing:** Japan residents see vacations as a time to indulge their passion for food and cuisine, to feel alive and energetic, rest and relax, and to experience other cultures.
- **Previous Hawai'i Visits:** One third of Japanese residents (33%) have visited Hawai'i in the past three years, ranking at the top of the competitive set and on par with Europe.
- **Future Hawai'i Visits:** Among destinations Japanese are interested in visiting in the next two years, Hawai'i falls in second place at 37 percent, below Europe (49%). Nearly one fifth (16%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 74 percent plan to go to O'ahu, while 42 percent intend to visit the Island of Hawai'i and 25 percent plan to go to Maui.
- **Never Been's:** One quarter of Japanese residents (27%) have never visited Hawai'i before, while 25 percent have visited once and 48 percent have visited two or more times.
- **Reasons for Returning:** Stunning natural beauty, beaches, safety, and great weather are among the top reasons why the Japanese continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 74 percent plan to stay in a hotel, followed distantly by condos (17%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, not having enough time, the price of airfare/hotel, been before and wishing to try another destination, and being too congested are among the top travel barriers.

## Korea

- **Reasons for Vacationing:** Korean residents see vacations as a chance to experience other cultures, rest/relax, to feel alive and energetic, and spend quality time with spouse/family.
- **Previous Hawai'i Visits:** Over one in ten Korean residents (13%) have visited Hawai'i in the past three years, ranking close to the bottom of the competitive set.
- **Future Hawai'i Visits:** Among destinations Koreans are interested in visiting in the next two years, Hawai'i ranks second at 42 percent, following Europe. One fifth (21%) plan to visit Hawai'i in the next year.
- **Future Island Visits:** For those who are planning to visit, 52 percent plan to go to the Island of Hawai'i, while 35 percent intend to visit Maui, and 37 percent plan to go to O'ahu.
- **Never Beens:** One third of Korean residents (38%) have never visited Hawai'i before, while 47 percent have visited once.
- **Reasons for Returning:** Great beaches, stunning natural beauty, great weather, and food/dining options are among the top reasons why Koreans continue to vacation in Hawai'i.
- **Future Accommodations:** Of those planning to visit in the next year, 88 percent plan to stay in a hotel, followed distantly by condos (27%).
- **Barriers to Hawai'i Travel:** Among the reasons for considering but not planning to visit Hawai'i, the flight being too long, not having enough time to travel, and the price of airfare are among the top travel barriers.

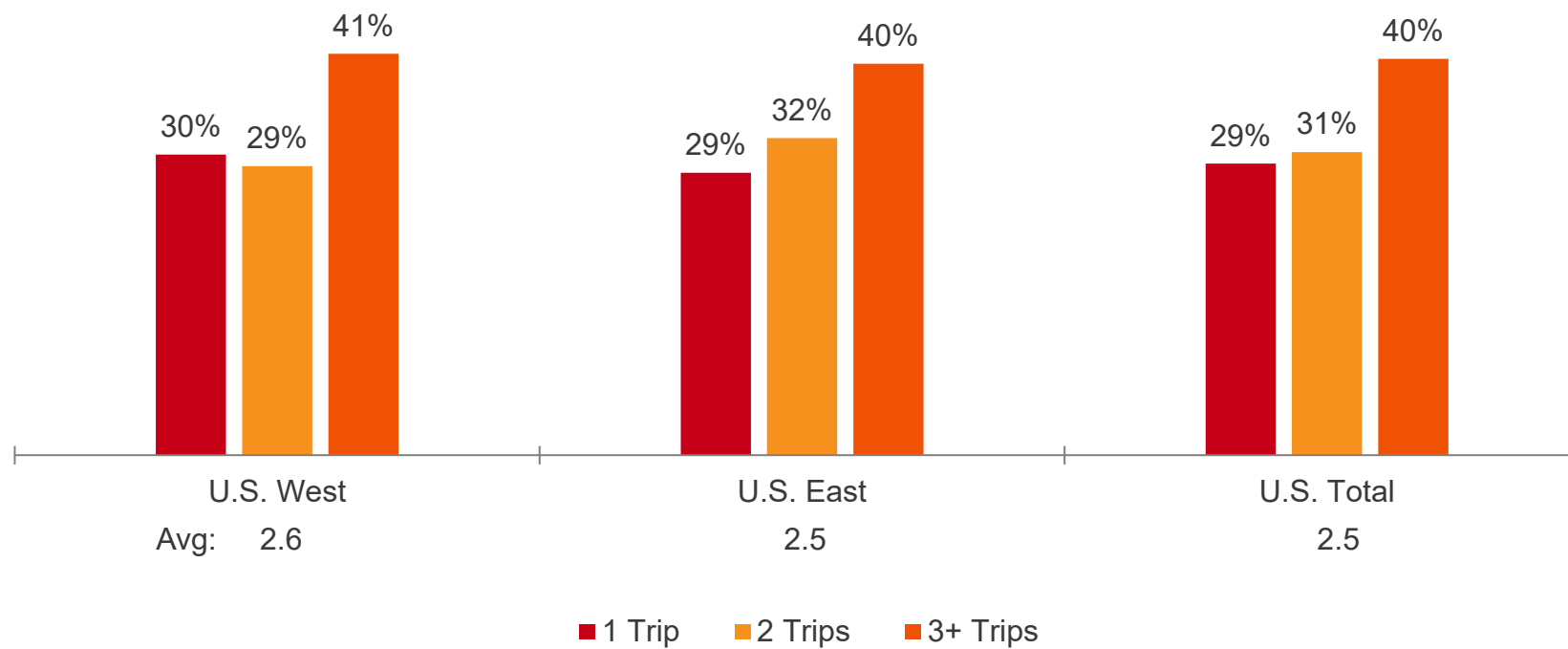
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## **Summary of Market – U.S.**

## Demographics by Market

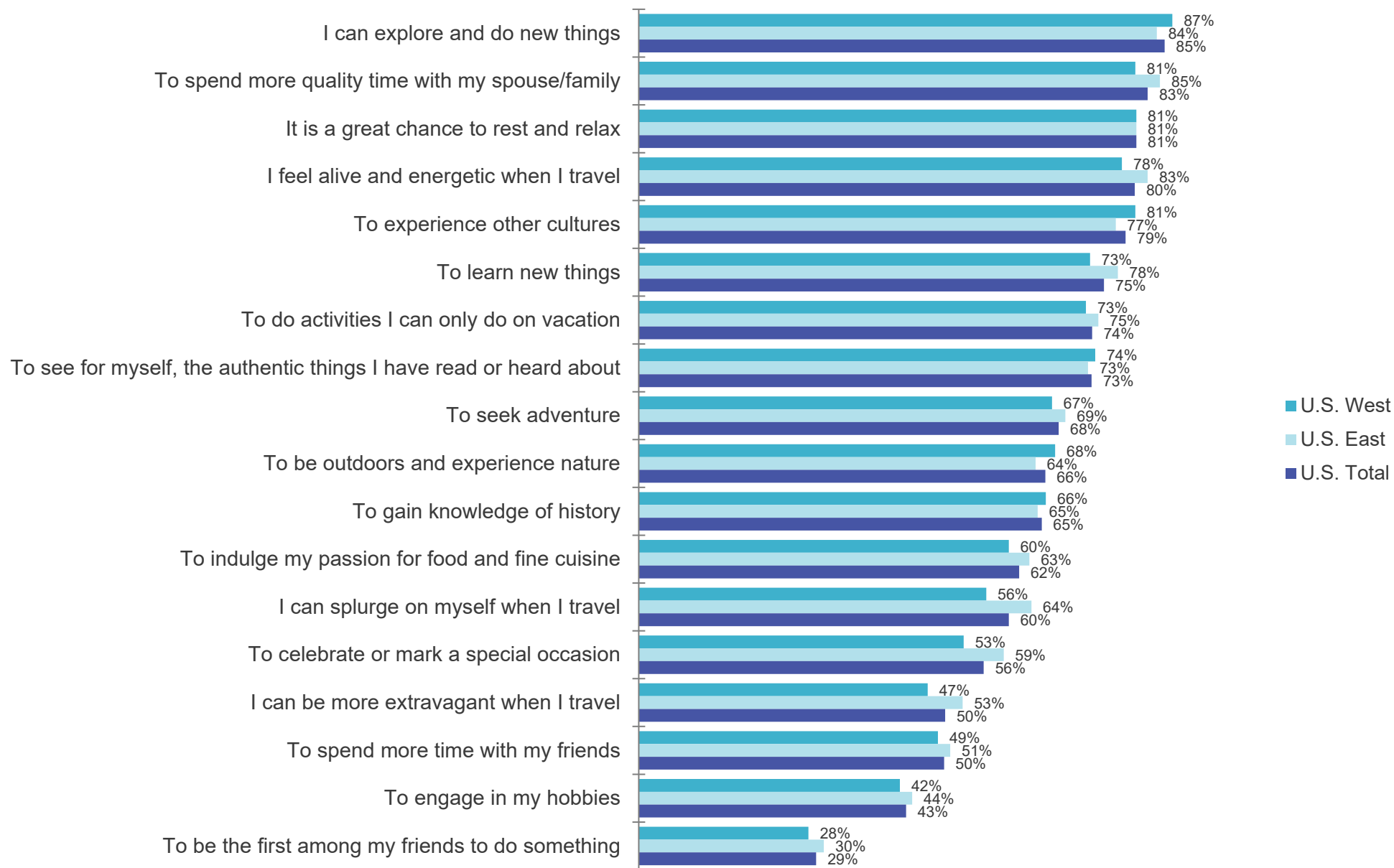
	U.S. West	U.S. East	U.S. Total
<i>Base:</i>	600	600	1,200
<b>Gender</b>			
Male	49%	49%	49%
Female	51%	51%	51%
<b>Marital Status</b>			
Single	21%	20%	20%
Married	64%	64%	64%
<b>Employment</b>			
Full Time Employed	63%	65%	64%
Retired	17%	15%	16%
<b>Education Level</b>			
Graduated College (Bachelor or higher)	75%	73%	74%
<b>Race/Ethnicity</b>			
White	69%	82%	75%
Black/African America	3%	5%	4%
Asian/Pacific Islander	24%	9%	17%
Hispanic/Latino	9%	7%	8%
<b>Children in Household (1+)</b>			
Children at Home	43%	45%	44%
<b>Age</b>			
18-24	11%	13%	12%
25-34	18%	18%	18%
35-44	19%	18%	18%
45-54	19%	19%	19%
55-64	16%	15%	15%
65+	17%	17%	17%
Average	46.1	45.65	45.9
<b>Household Income</b>			
\$75,000 - \$99,999	33%	35%	34%
\$100,000 - \$149,999	42%	42%	42%
\$150,000+	25%	23%	24%
Average	\$126,541	\$125,000	\$125,770

## Number of Leisure Trips Taken in Past 12 Months

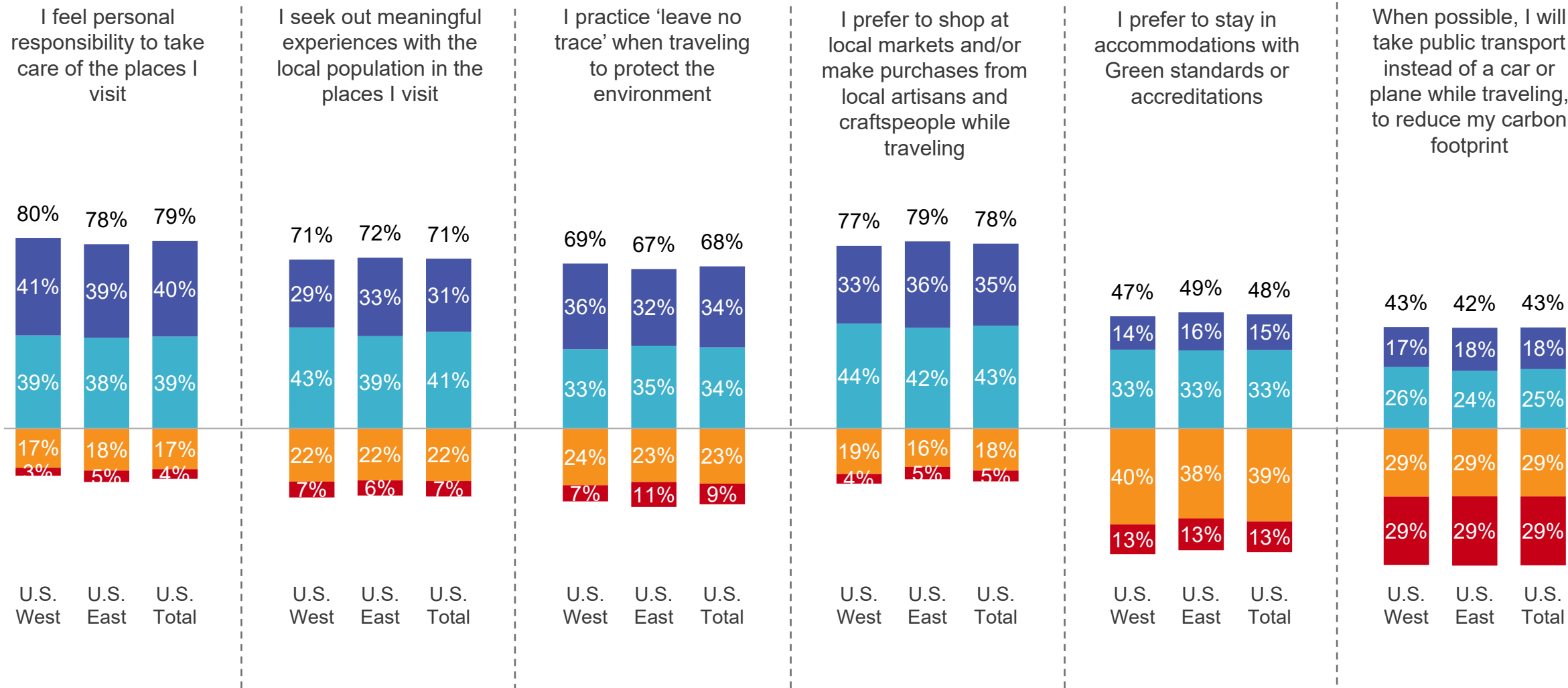




## Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



# Sustainable Travel



■ Neutral 
 ■ Disagree 
 ■ Somewhat Agree 
 ■ Strongly Agree

## Destinations Visited Past 3 Years

U.S. West		
1	Hawai'i	42%
2	Mexico	35%
3	United Kingdom (UK)	21%
4	Caribbean	19%
5	France	19%
6	Italy	17%
7	Southeast Asia	16%
8	Alaska	16%
9	Other Europe	15%
10	Germany	13%
11	Central/South America	11%
12	Switzerland	8%
13	Australia	8%

U.S. East		
1	Florida	66%
2	California	37%
3	Caribbean	30%
4	Mexico	23%
5	Hawai'i	20%
6	United Kingdom (UK)	18%
7	France	15%
8	Italy	14%
9	Other Europe	12%
10	South America	9%
11	Puerto Rico	9%
12	Central America	8%
13	Germany	8%
14	Bermuda	6%
15	Southeast Asia	6%
16	Iceland	5%
17	Switzerland	4%
18	Cuba	4%

## Destinations Visited Past 12 Months

U.S. West		
1	Hawai'i	25%
2	Mexico	21%
3	United Kingdom (UK)	12%
4	Caribbean	10%
5	Other Europe	9%
6	Alaska	8%
7	Italy	8%
8	South East Asia	8%
9	France	7%
10	Germany	6%
11	Central/South America	5%
12	Australia	4%
13	Switzerland	3%

U.S. East		
1	Florida	50%
2	California	22%
3	Caribbean	16%
4	Mexico	12%
5	Hawai'i	10%
6	United Kingdom (UK)	8%
7	Italy	7%
8	Other Europe	6%
9	France	5%
10	South America	4%
11	South East Asia	4%
12	Central America	4%
13	Puerto Rico	4%
14	Germany	3%
15	Iceland	3%
16	Switzerland	2%
17	Bermuda	2%
18	Cuba	2%

## Destinations Considering for Next Overnight Vacation

U.S. West		
1	Hawai'i	57%
2	Alaska	37%
3	Caribbean	34%
4	Italy	33%
5	United Kingdom (UK)	30%
6	France	29%
7	Australia	26%
8	Mexico	26%
9	Other Europe	20%
10	Germany	20%
11	Switzerland	18%
12	Central/South America	16%
13	Southeast Asia	15%

U.S. East		
1	Caribbean	49%
2	Florida	42%
3	Hawai'i	39%
4	California	32%
5	Italy	31%
6	United Kingdom (UK)	25%
7	Mexico	22%
8	France	20%
9	Other Europe	18%
10	Bermuda	18%
11	Puerto Rico	17%
12	Iceland	16%
13	Switzerland	15%
14	Germany	14%
15	South America	14%
16	Central America	13%
17	Southeast Asia	10%
18	Cuba	7%



## Destinations Interested in Visiting Next 24 Months

U.S. West		
1	Hawai'i	54%
2	Italy	38%
3	Alaska	38%
4	United Kingdom (UK)	35%
5	France	33%
6	Australia	32%
7	Caribbean	32%
8	Mexico	26%
9	Switzerland	25%
10	Other Europe	25%
11	Germany	24%
12	South East Asia	23%
13	Central/South America	18%

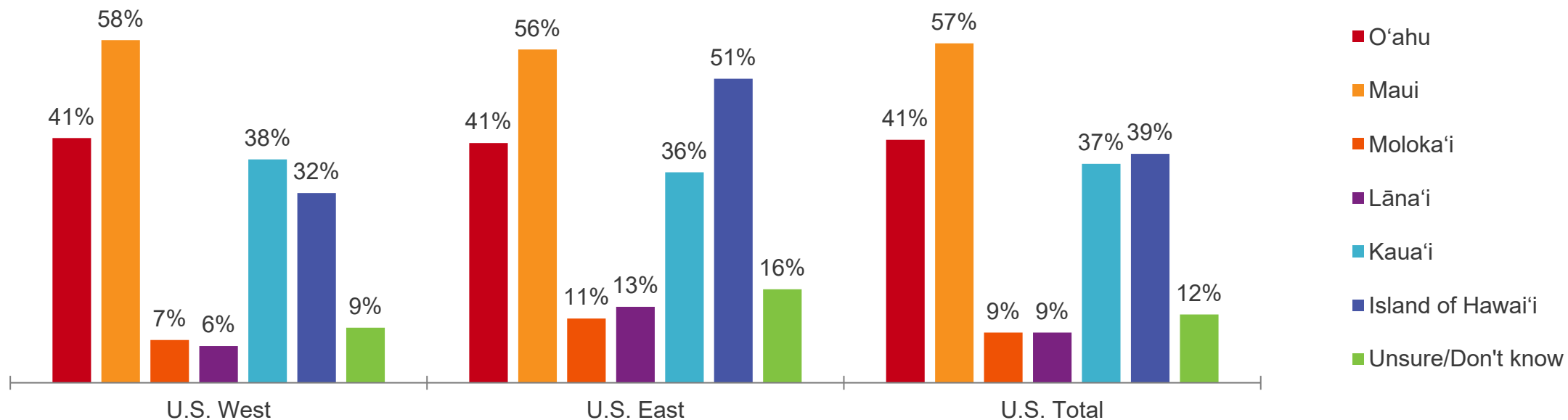
U.S. East		
1	Hawai'i	47%
2	Caribbean	45%
3	Florida	44%
4	California	35%
5	Italy	34%
6	United Kingdom (UK)	32%
7	France	29%
8	Mexico	22%
9	Switzerland	20%
10	Germany	20%
11	Iceland	20%
12	Other Europe	18%
13	Bermuda	17%
14	Puerto Rico	16%
15	South America	16%
16	Central America	12%
17	South East Asia	10%
18	Cuba	9%

## Destinations Plan to Visit Next 12 Months

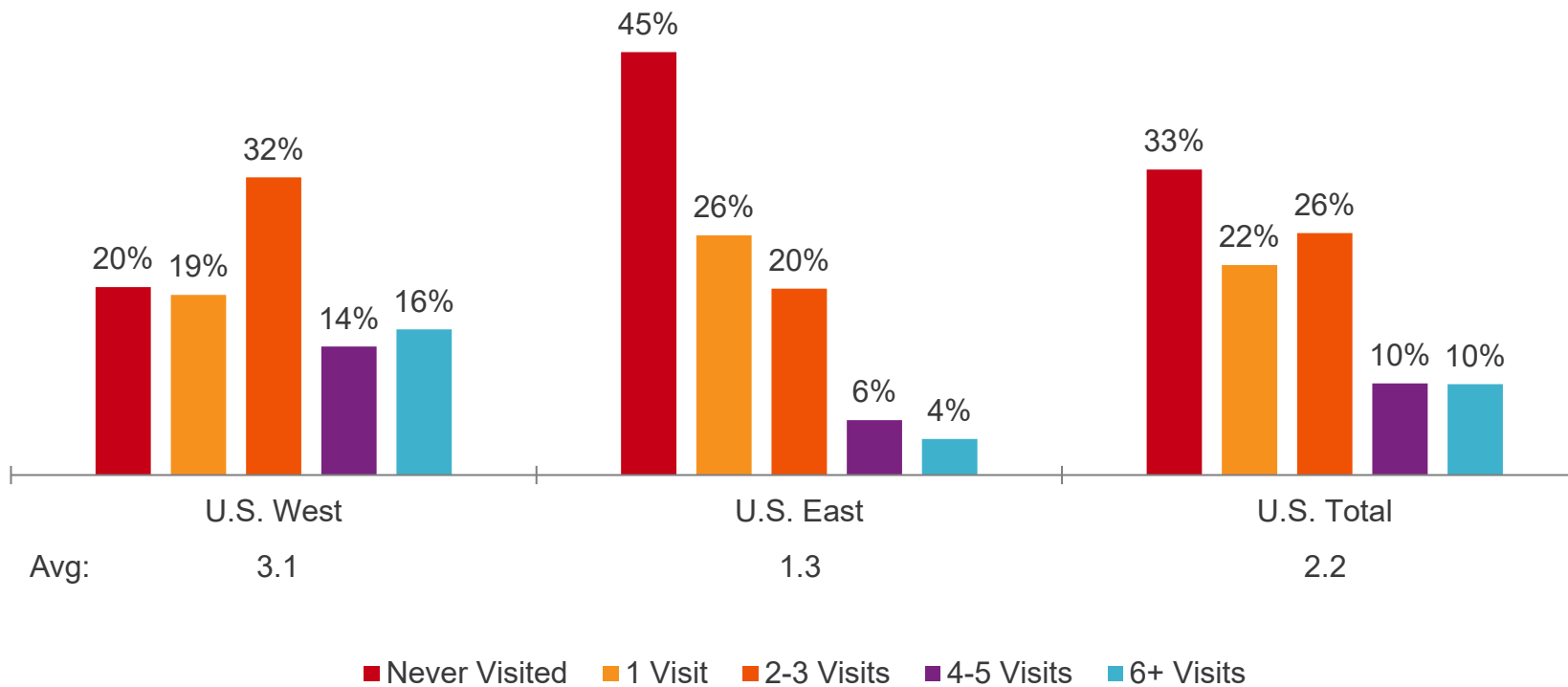
U.S. West		
1	Hawai'i	32%
2	Alaska	15%
3	Mexico	14%
4	Caribbean	14%
5	Italy	14%
6	United Kingdom (UK)	13%
7	Other Europe	12%
8	France	11%
9	Southeast Asia	10%
10	Central/South America	7%
11	Switzerland	7%
12	Australia	6%
13	Germany	6%

U.S. East		
1	Florida	32%
2	Caribbean	22%
3	California	17%
4	Hawai'i	17%
5	Italy	12%
6	United Kingdom (UK)	12%
7	Mexico	9%
8	France	8%
9	Other Europe	8%
10	South America	6%
11	Bermuda	5%
12	Switzerland	5%
13	Germany	5%
14	Iceland	4%
15	Puerto Rico	4%
16	Central America	4%
17	Southeast Asia	3%
18	Cuba	2%

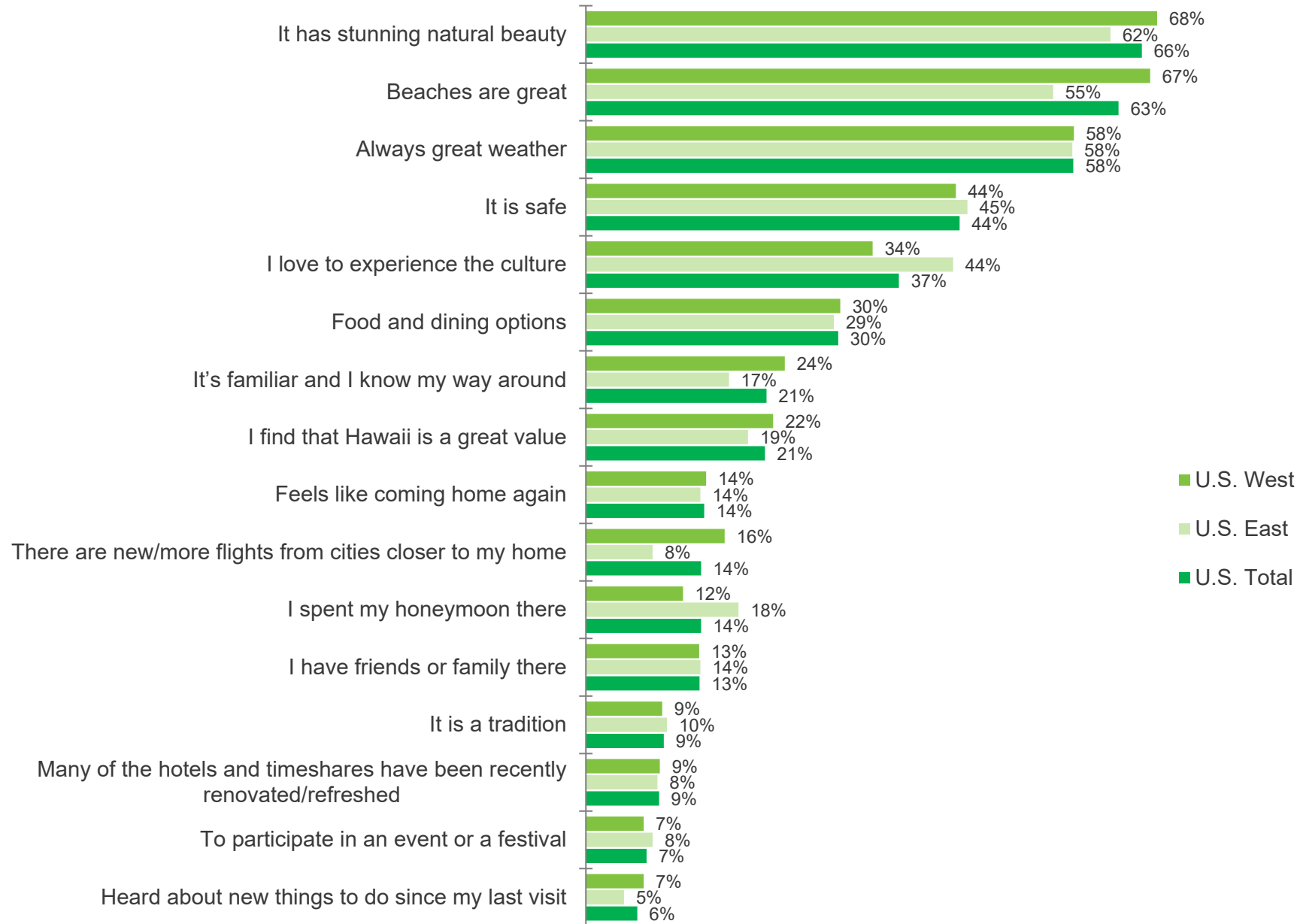
# Hawaiian Islands Plan to Visit Next 12 Months



# Number of Times Visited Hawai'i in Lifetime

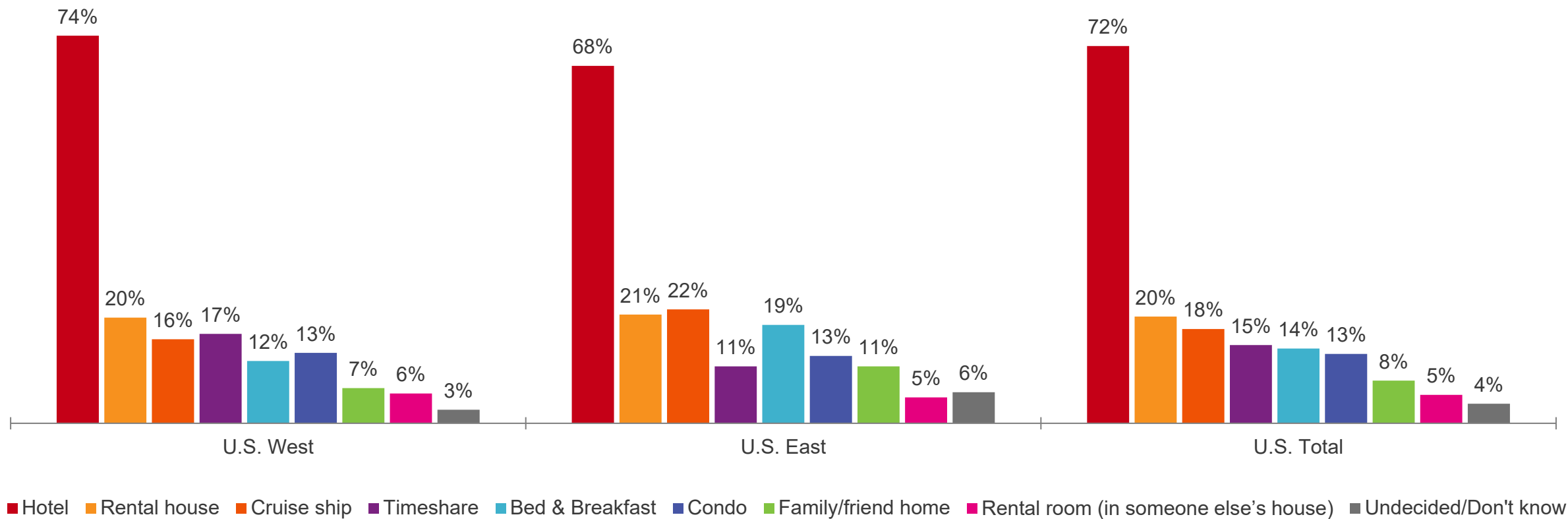


# Reasons for Returning to Hawai‘i

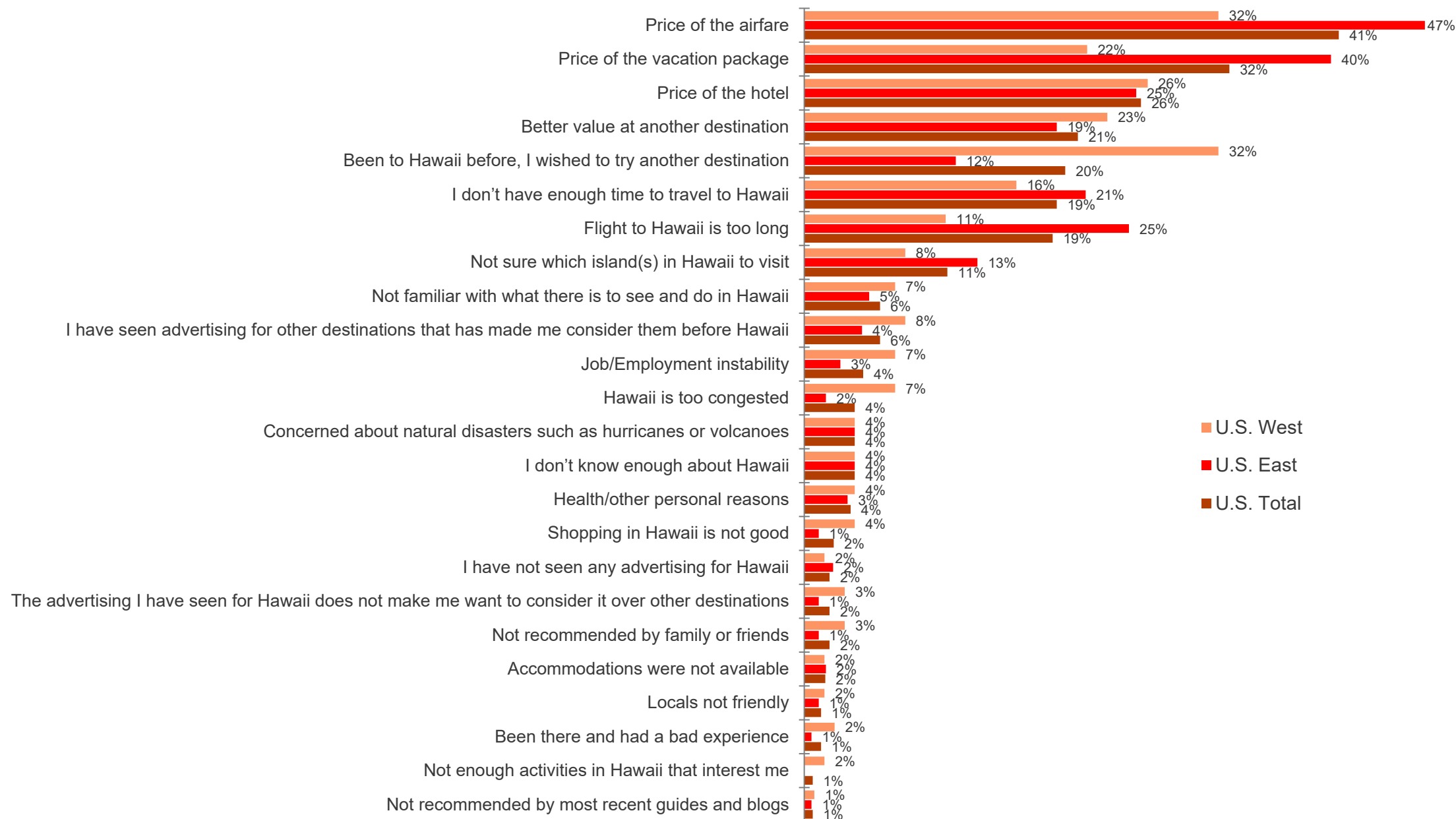




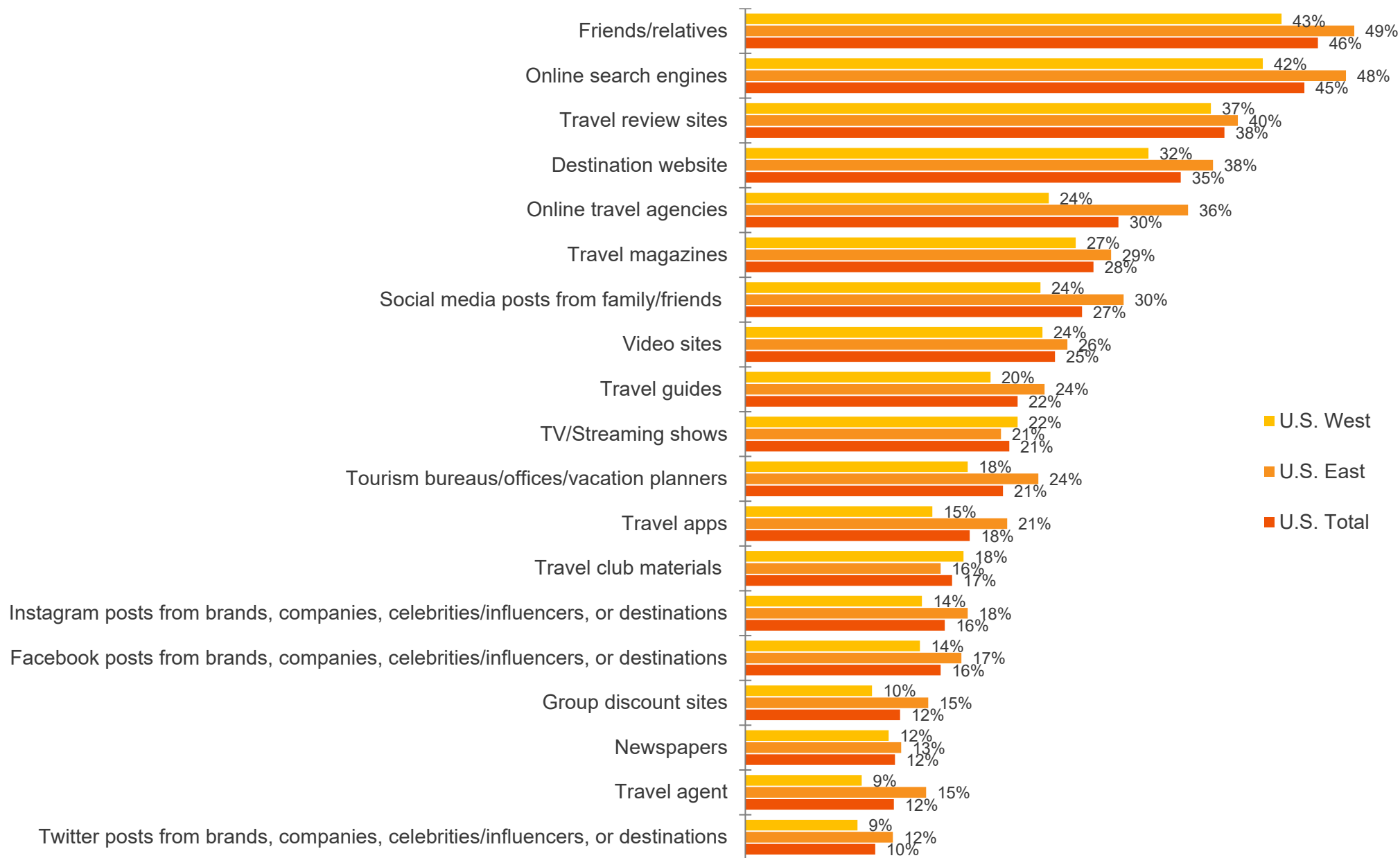
# Hawai'i Planned Accommodations



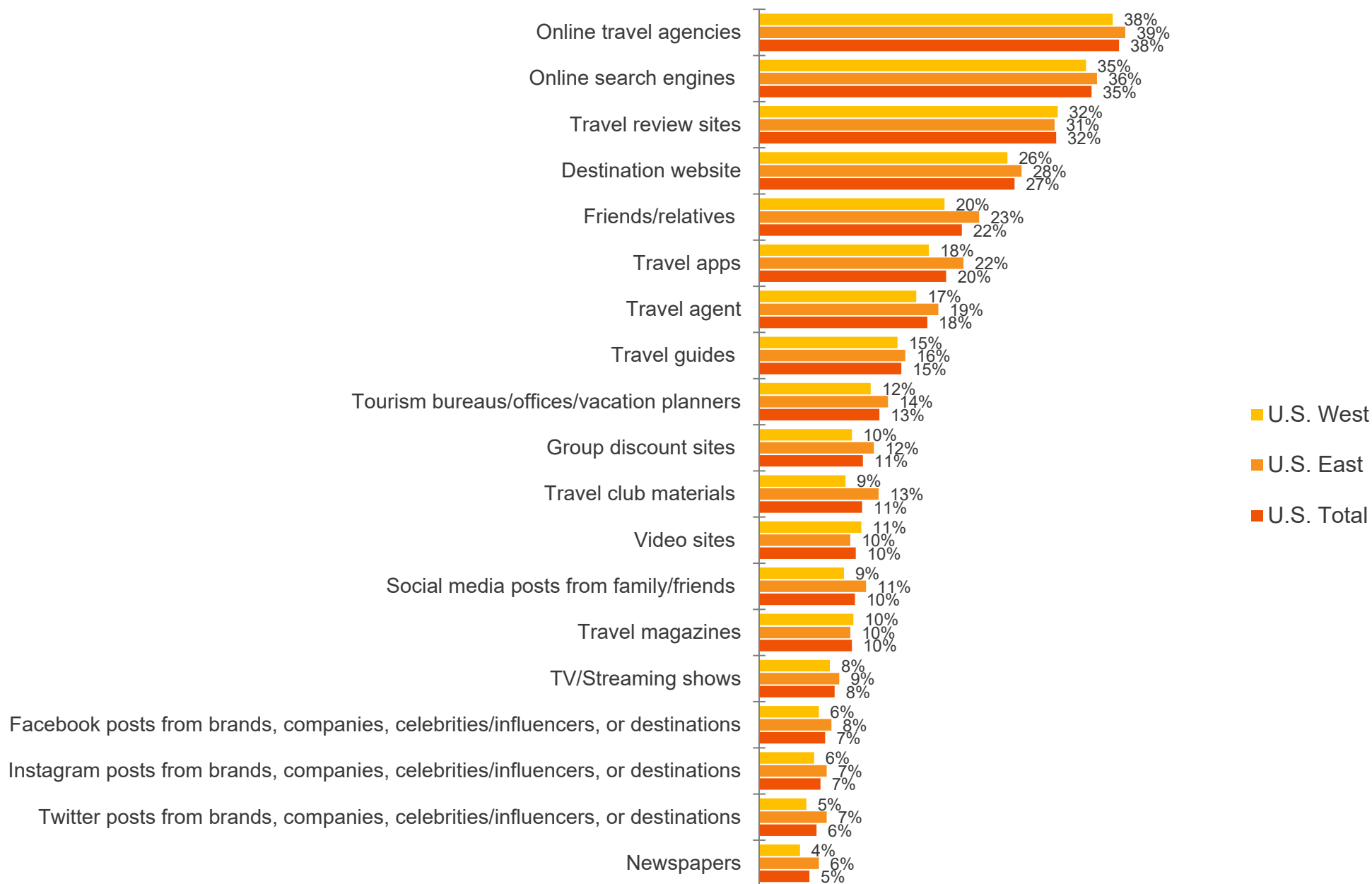
# Reasons for Considering but Not Visiting Hawai'i



# Travel Inspiration Sources



# Travel Planning and Booking Sources



**3**

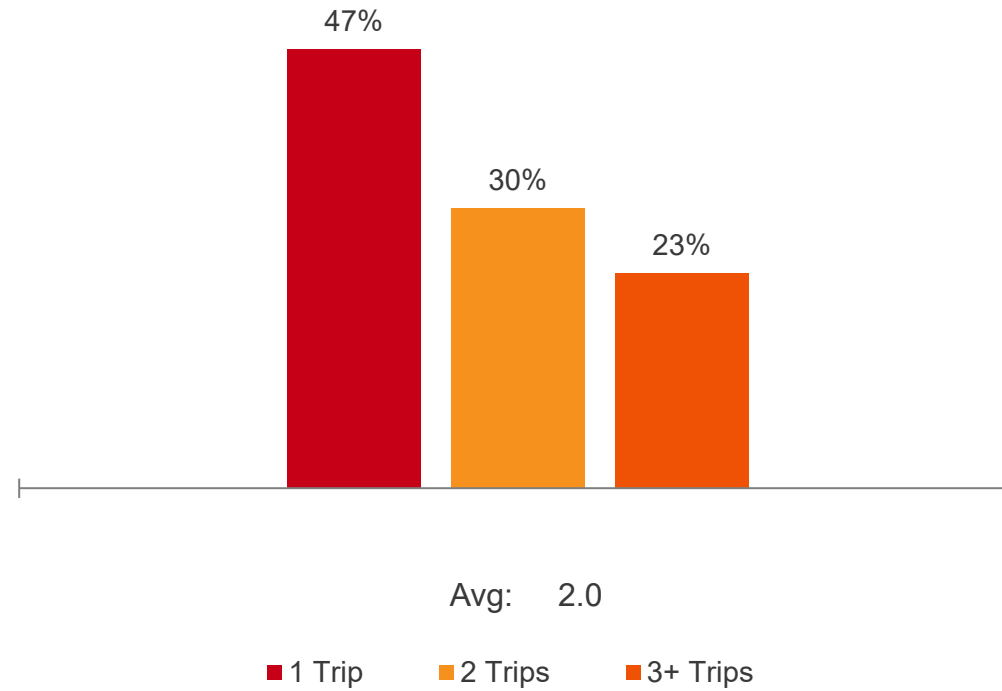
## **Summary of Markets – Canada**



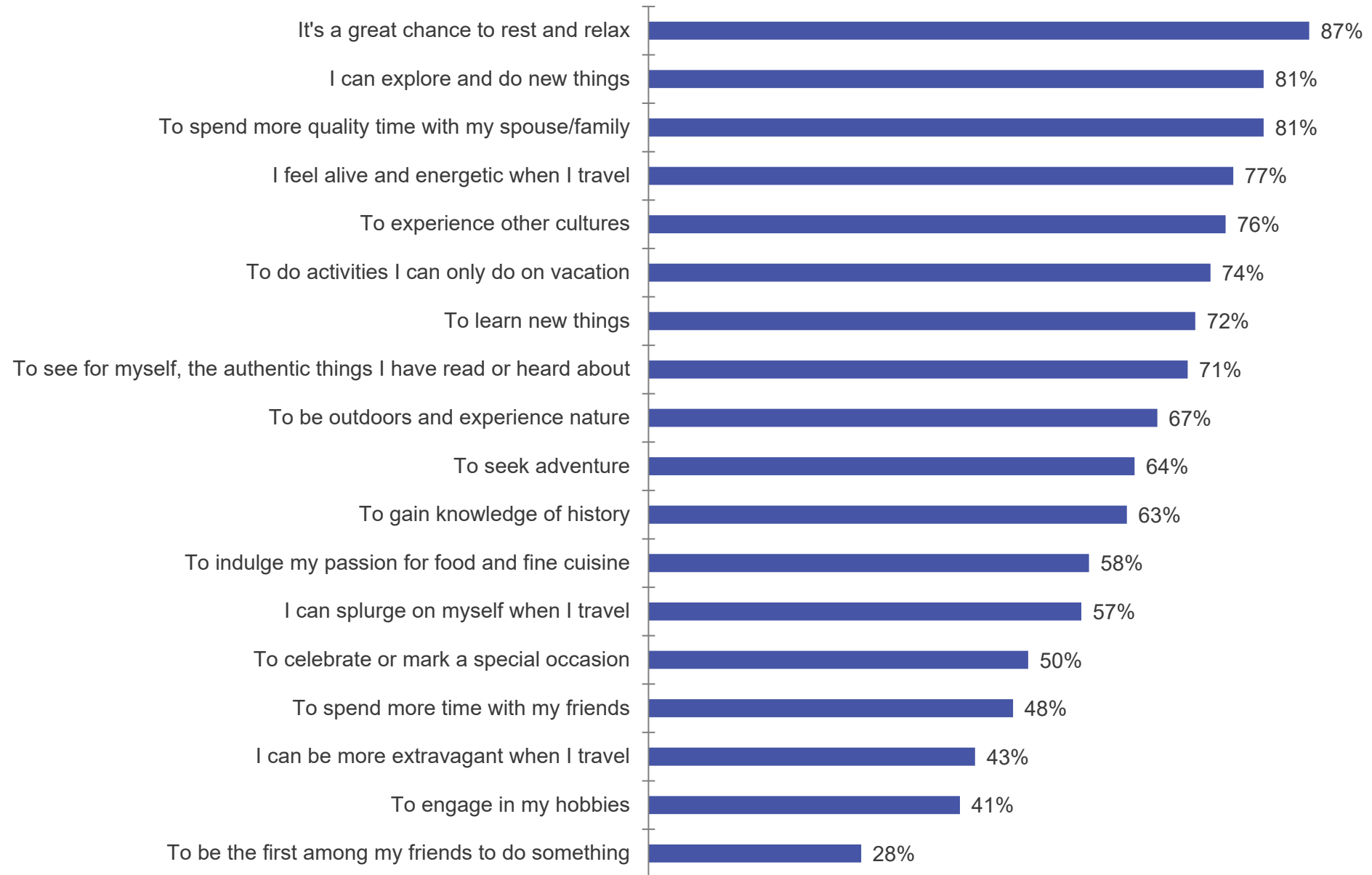
## Demographics by Market

	Canada
<i>Base:</i>	601
<b>Gender</b>	
Male	49%
Female	51%
<b>Marital Status</b>	
Single	20%
Married	53%
<b>Employment</b>	
Full Time Employed	67%
Retired	14%
<b>Education Level</b>	
Graduated College	76%
<b>Race/Ethnicity</b>	
White	77%
Black/African America	3%
Asian/Pacific Islander	16%
Hispanic/Latino	1%
<b>Children in Household (1+)</b>	
Children at Home	42%
<b>Age</b>	
18-24	12%
25-34	18%
35-44	17%
45-54	19%
55-64	16%
65+	18%
Average	46
<b>Household Income</b>	
\$75 - \$99,999	39%
\$100 - \$150,000	43%
\$150,000+	19%
Average	\$119,654

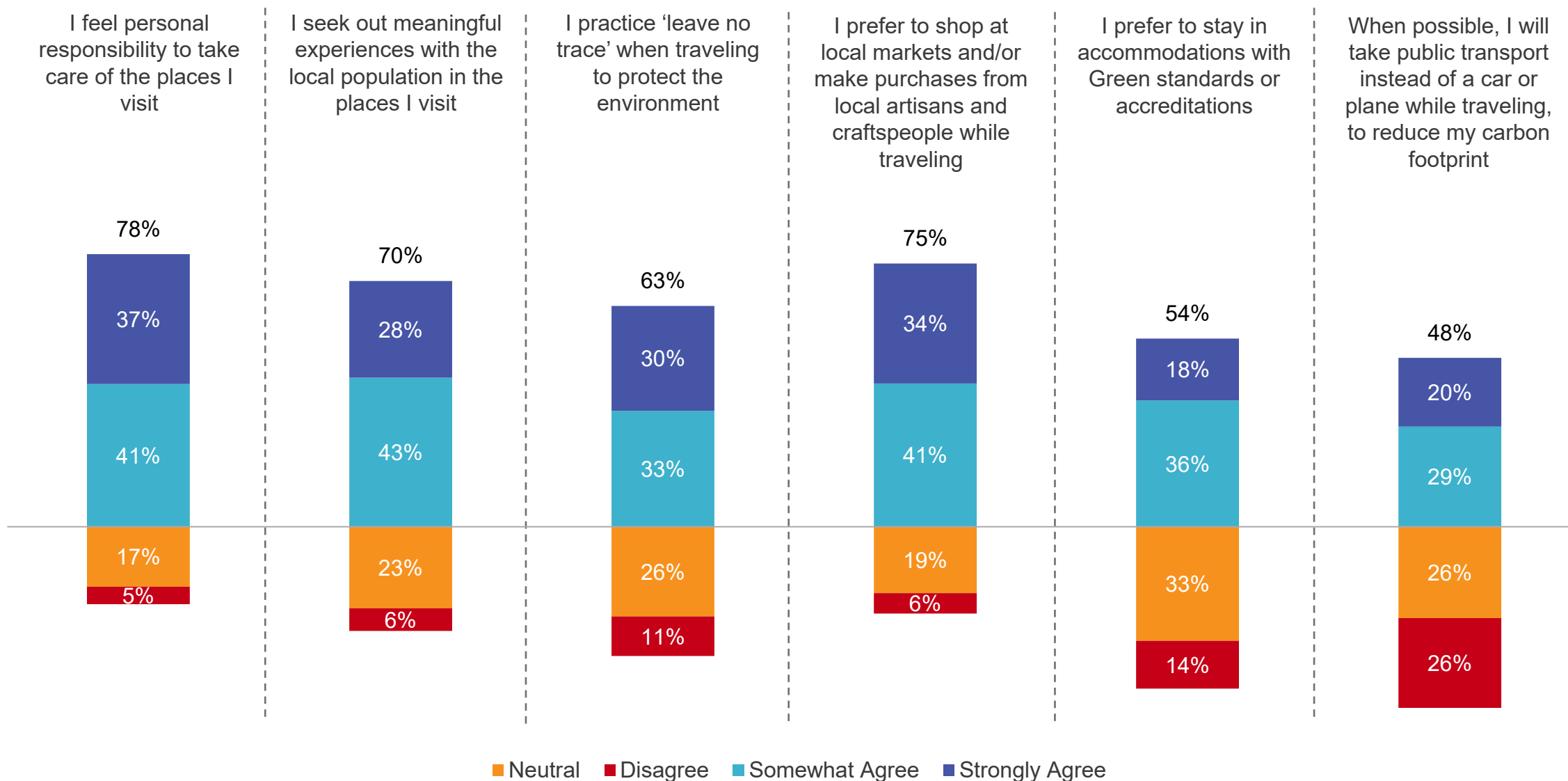
## Number of Leisure Trips Taken in Past 12 Months



## Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



# Sustainable Travel



## Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	40%
2	Florida	35%
3	Caribbean	35%
4	Mexico	30%
5	Las Vegas	30%
6	California	28%
7	Hawai'i	16%
8	Arizona	11%

Visited Past Year		
1	Europe	26%
2	Caribbean	20%
3	Florida	17%
4	Las Vegas	15%
5	California	14%
6	Mexico	13%
7	Hawai'i	7%
8	Arizona	6%

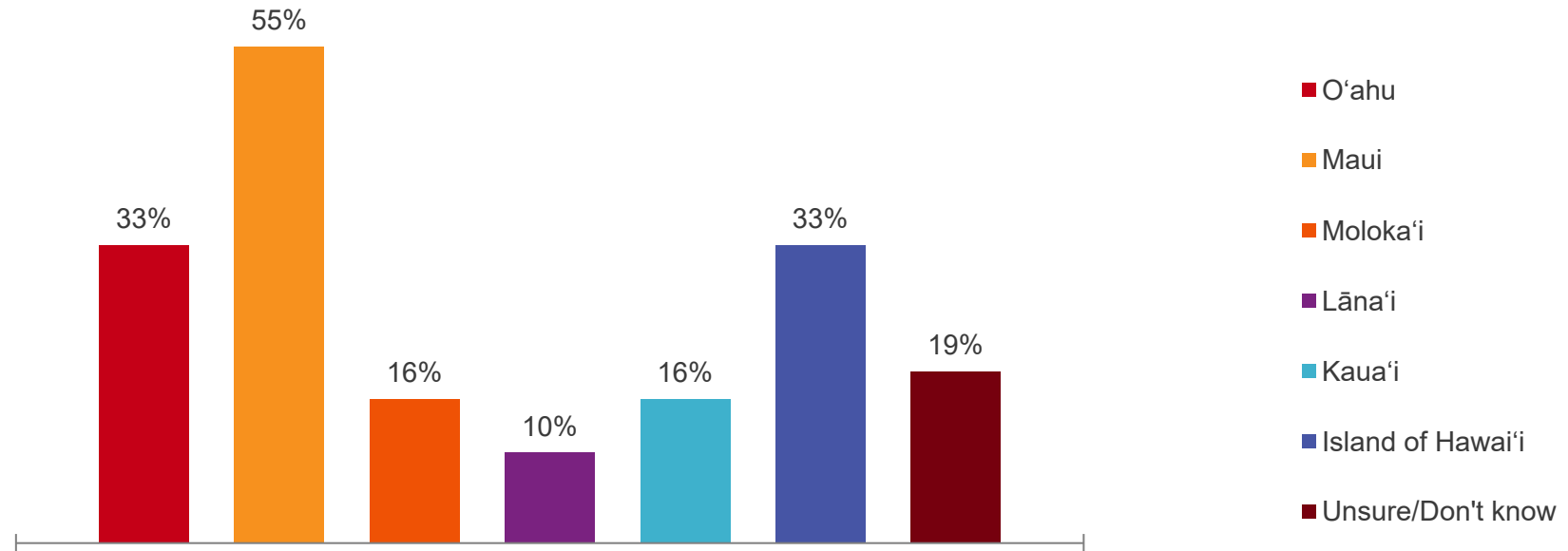
## Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	44%
2	Florida	36%
3	Caribbean	36%
4	California	32%
5	Las Vegas	30%
6	Hawai'i	29%
7	Mexico	28%
8	Arizona	13%

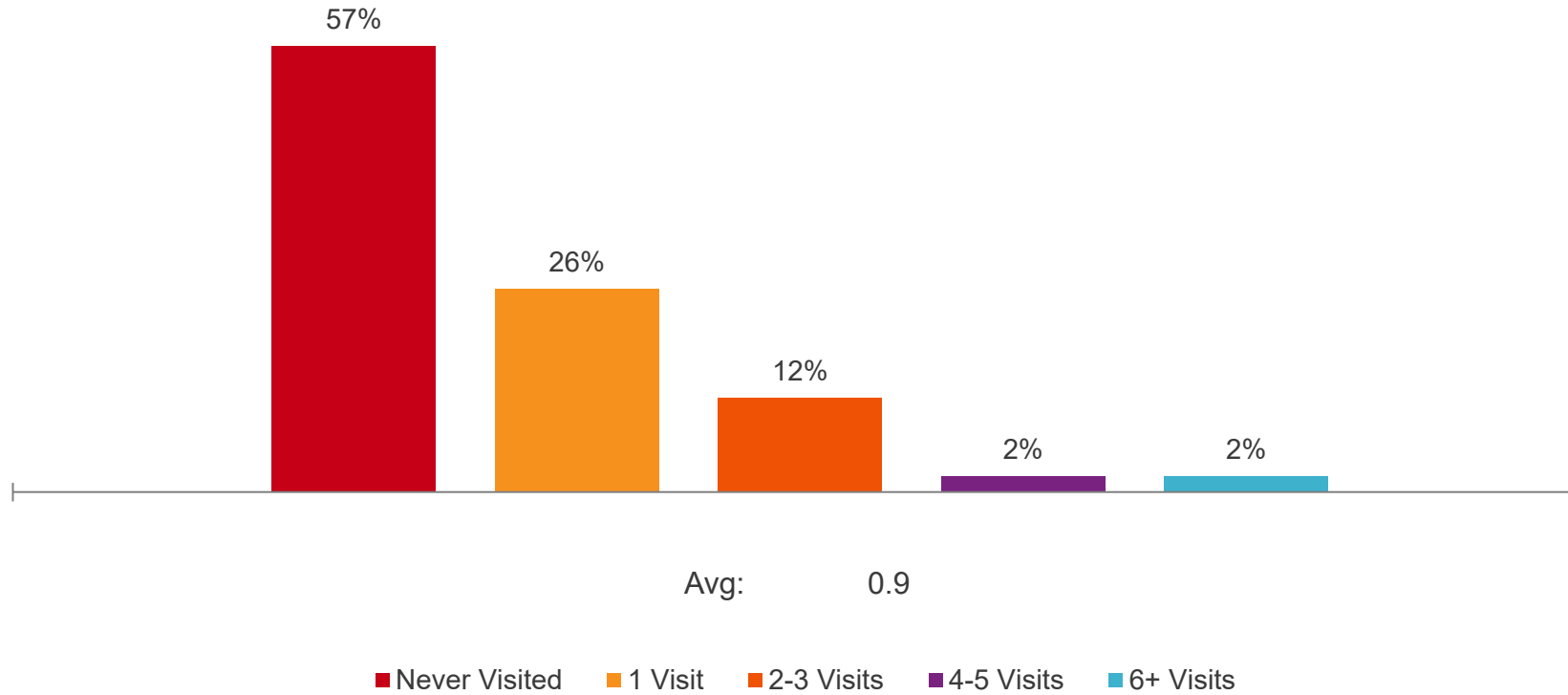
Interested Next 24 Months		
1	Europe	54%
2	Hawai'i	45%
3	Caribbean	40%
4	California	36%
5	Florida	35%
6	Mexico	30%
7	Las Vegas	29%
8	Arizona	16%

Planning Next 12 Months		
1	Europe	31%
2	Florida	21%
3	Caribbean	21%
4	California	17%
5	Hawai'i	16%
6	Las Vegas	14%
7	Mexico	13%
8	Arizona	6%

# Hawaiian Islands Plan to Visit Next 12 Months

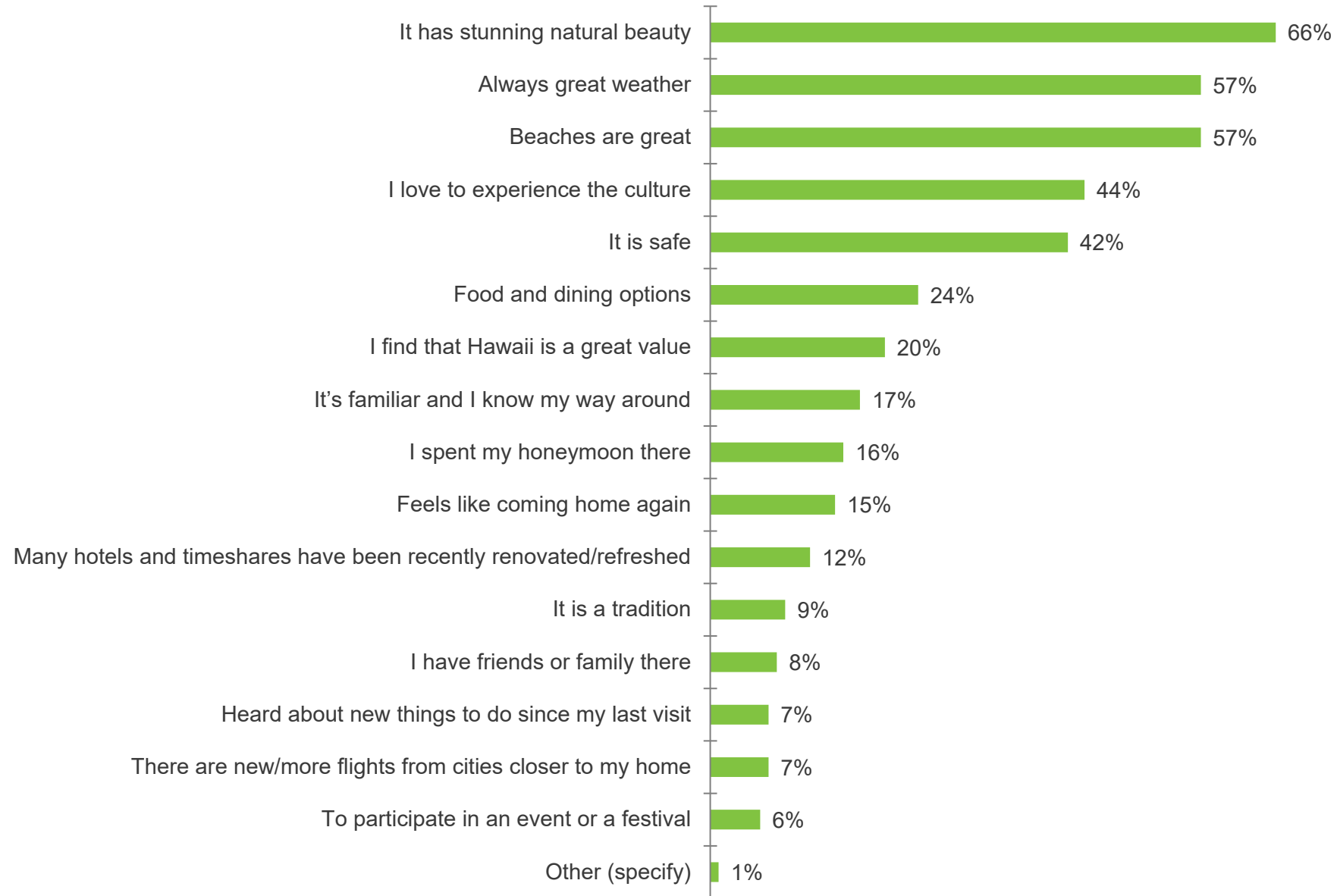


# Number of Times Visited Hawai'i in Lifetime

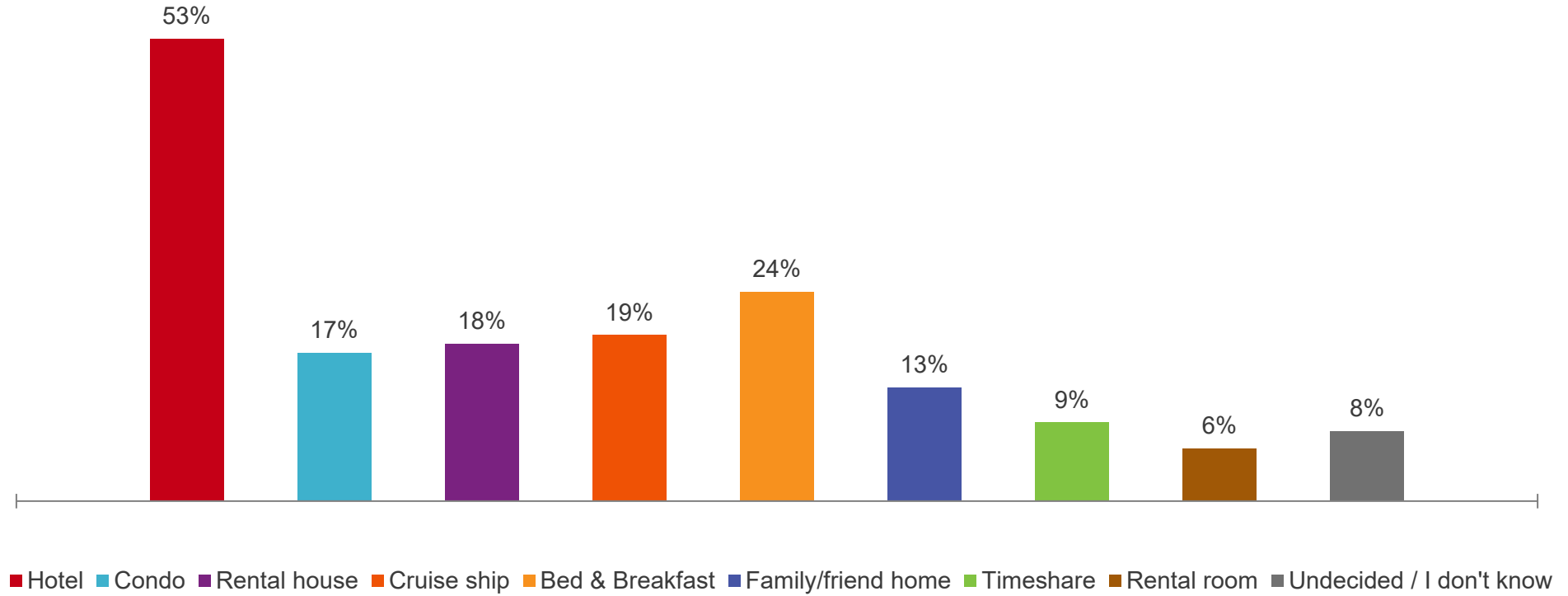




## Reasons for Returning to Hawai'i



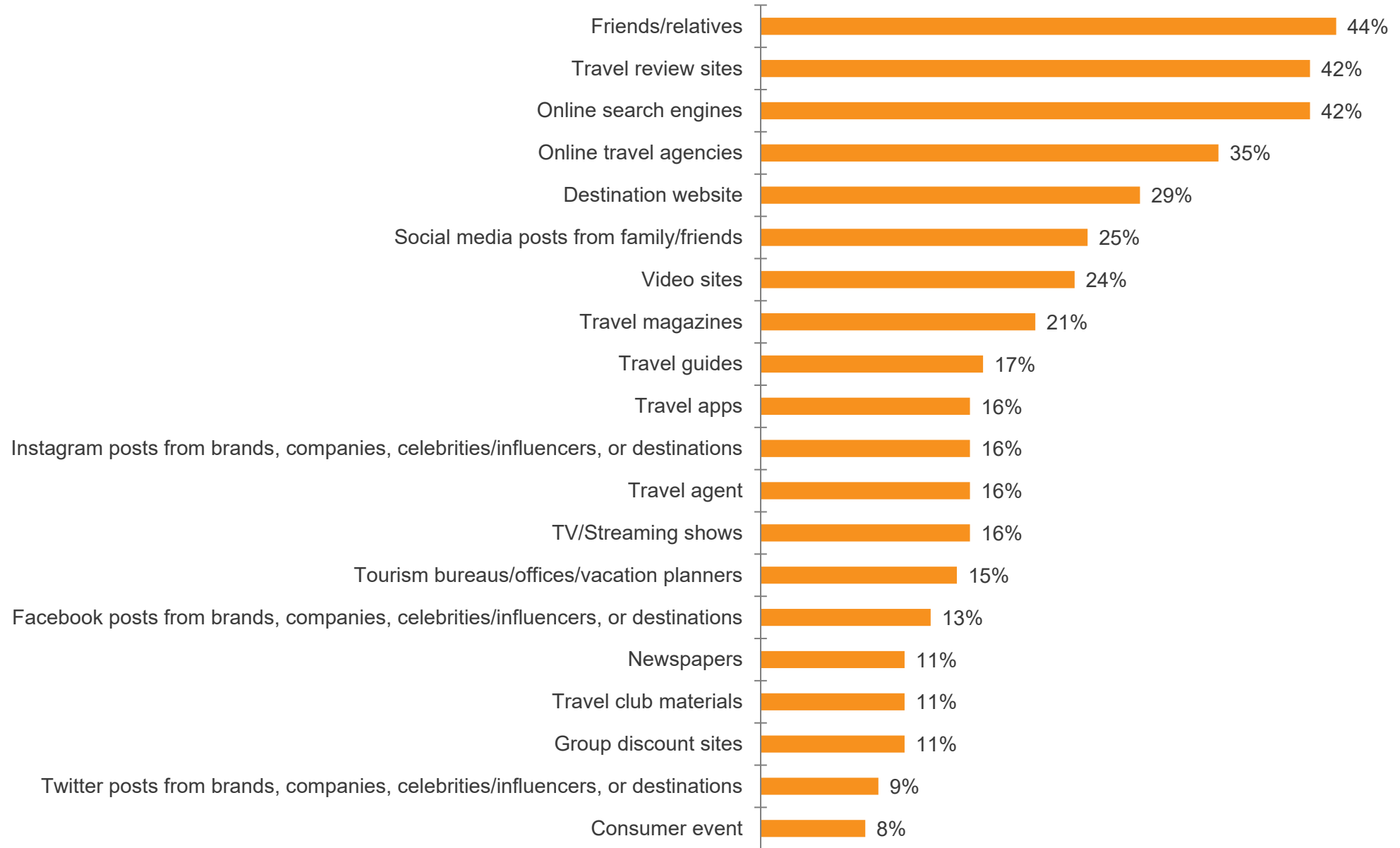
## Hawai'i Planned Accommodations



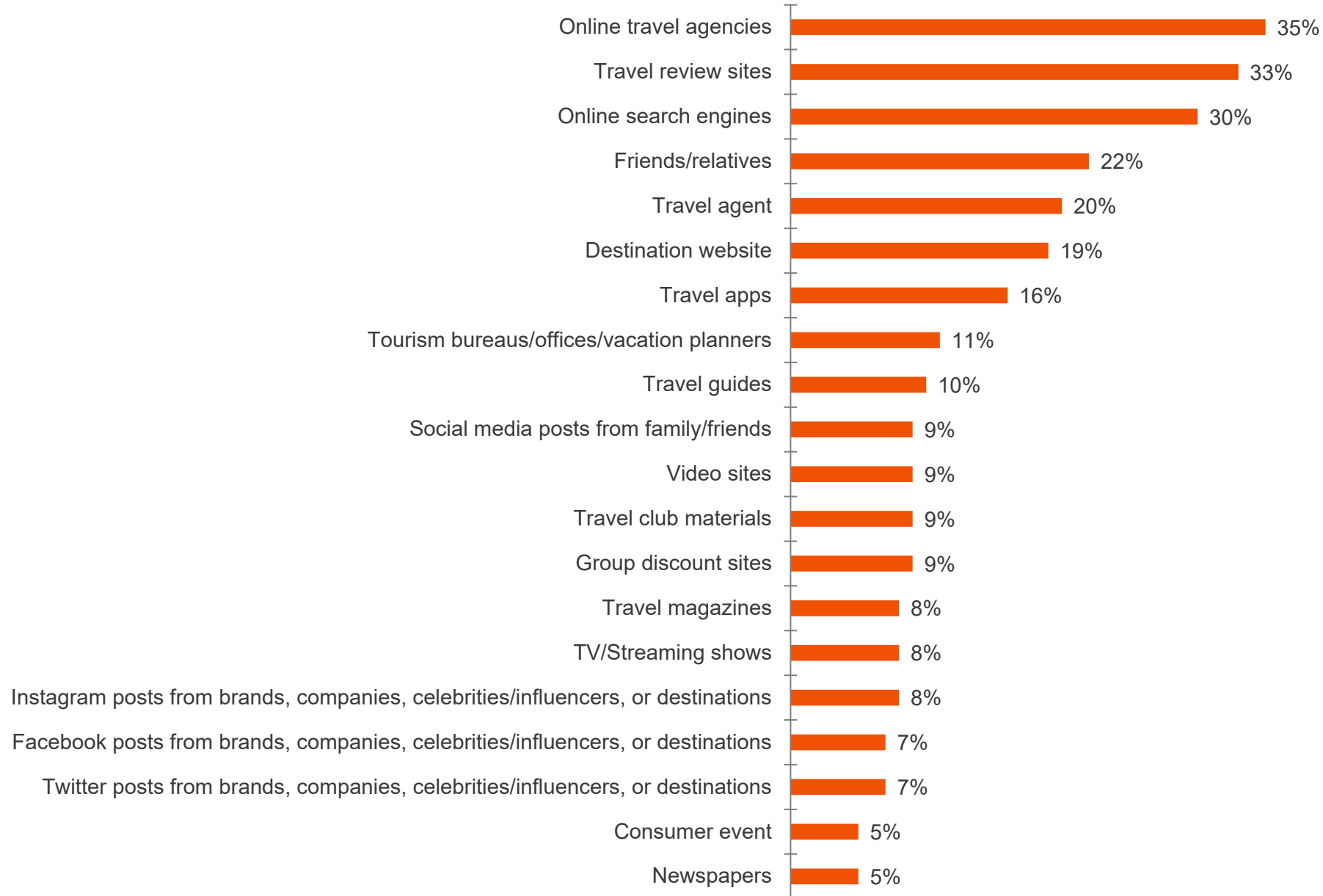
## Reasons for Considering but Not Visiting Hawai'i



# Travel Inspiration Sources



# Travel Planning and Booking Sources



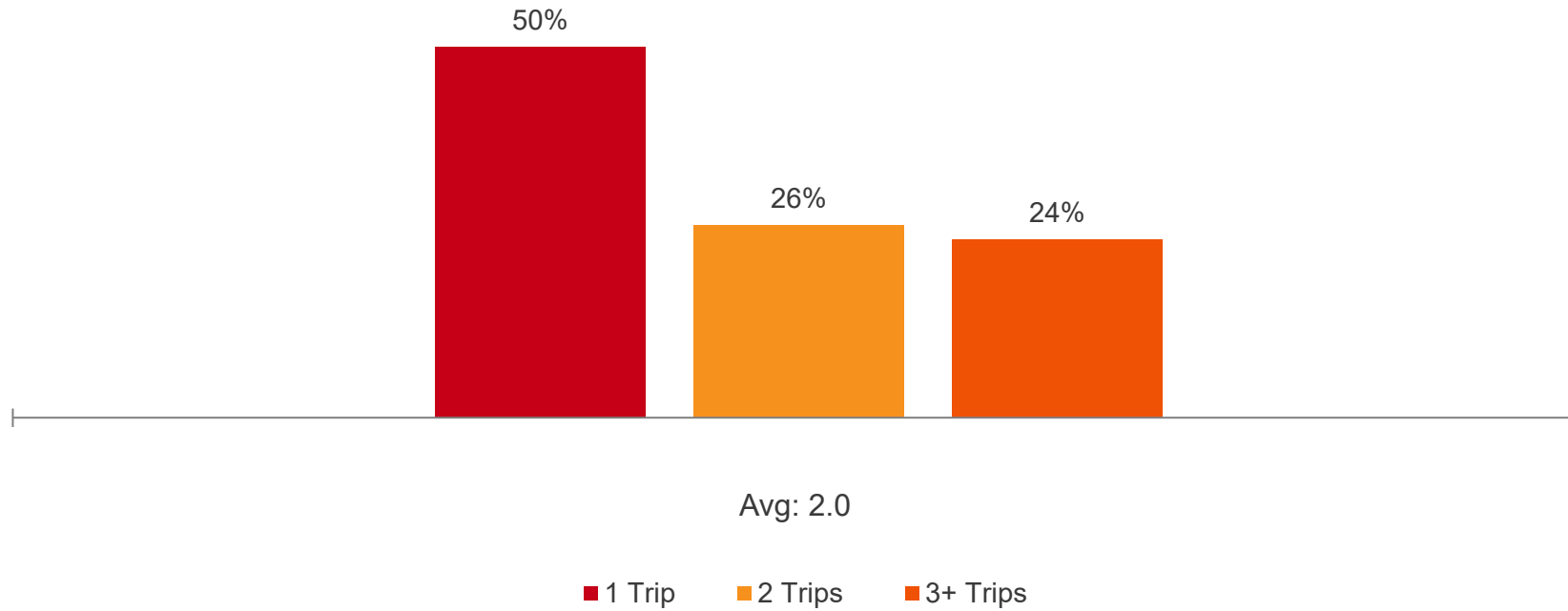
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## Summary of Markets – Japan

# Demographics by Market

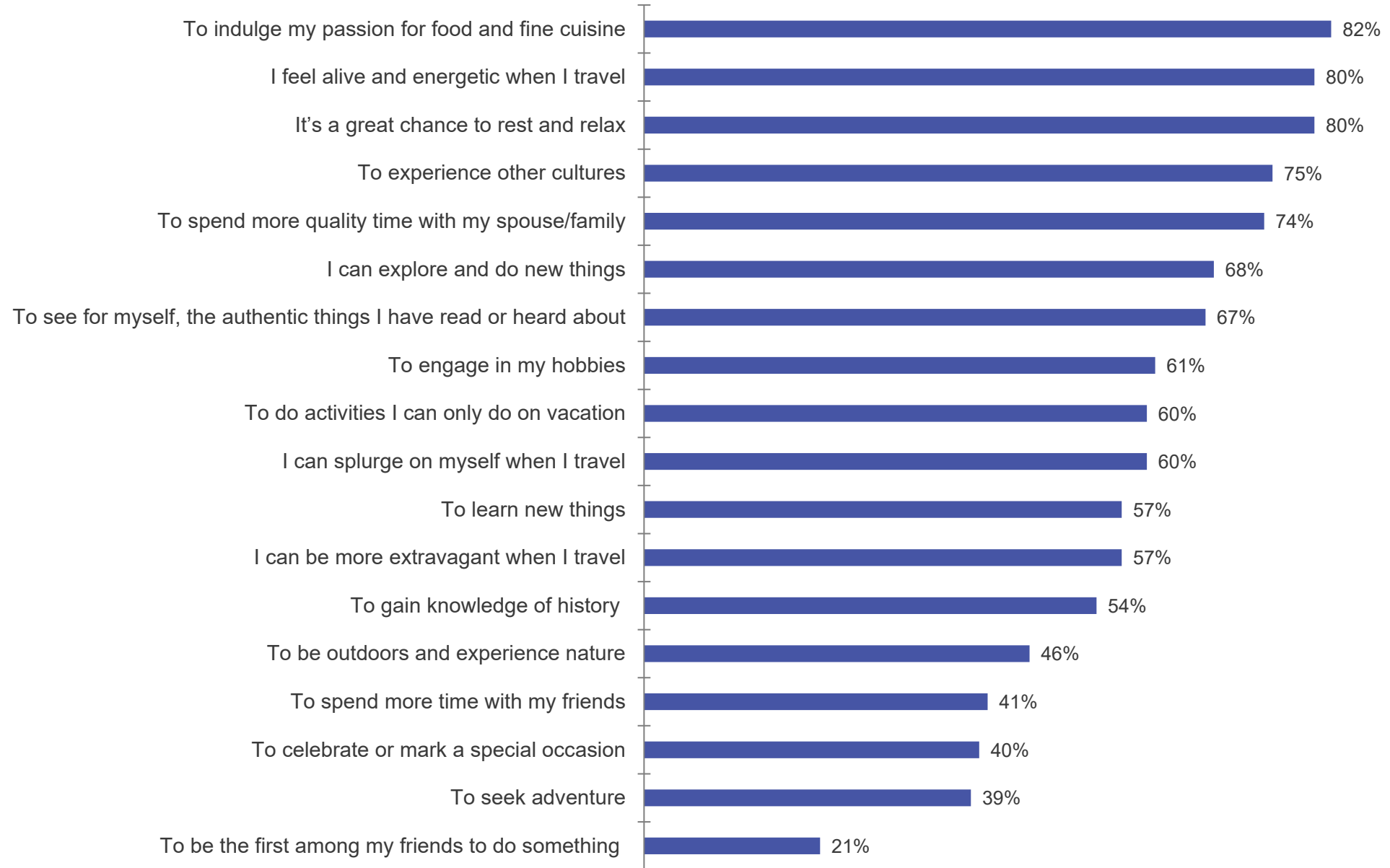
	Japan
<i>Base:</i>	600
<b>Gender</b>	
Male	51%
Female	49%
<b>Marital Status</b>	
Single	23%
Married	71%
<b>Employment</b>	
Full Time Employed	60%
Retired	10%
<b>Education Level</b>	
Graduated College	81%
<b>Children in Household (1+)</b>	
Children at Home	26%
<b>Age</b>	
18-24	11%
25-34	15%
35-44	14%
45-54	21%
55-64	12%
65+	28%
Average	49.0
<b>Household Income</b>	
Under ¥7,000,000	47%
¥7 - ¥9,999,999	26%
¥10 - ¥14,999,999	16%
¥15,000,000+	11%
Average	¥8,085,000

# Number of Leisure Trips Taken in Past 12 Months

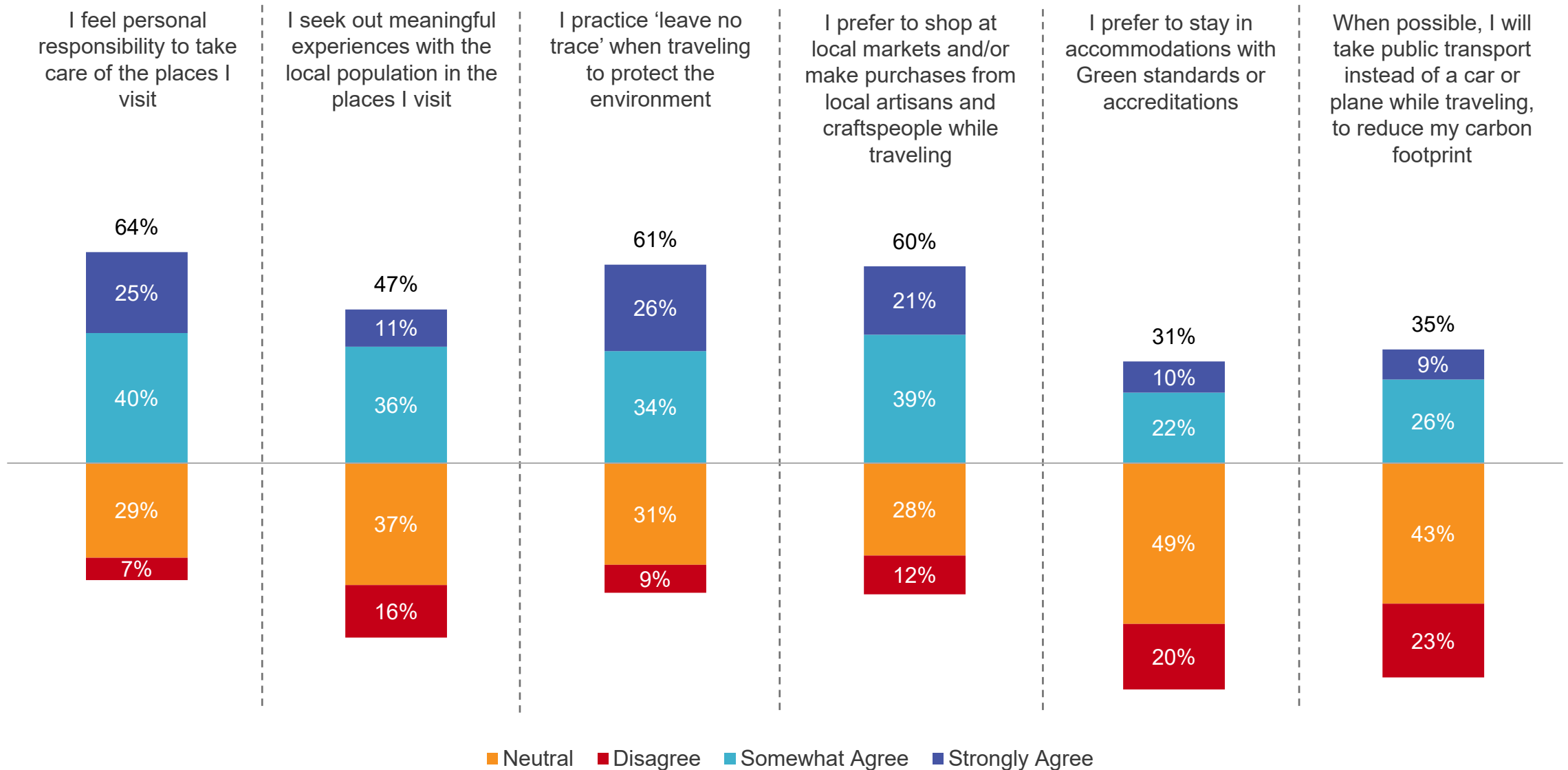




## Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



# Sustainability Initiatives



## Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	Europe	36%
2	Hawai'i	33%
3	Korea	22%
4	Singapore	22%
5	Australia	17%
6	Guam	14%
7	China	14%

Visited Past Year		
1	Europe	21%
2	Korea	11%
3	Singapore	10%
4	Hawai'i	16%
5	Australia	7%
6	China	6%
7	Guam	5%

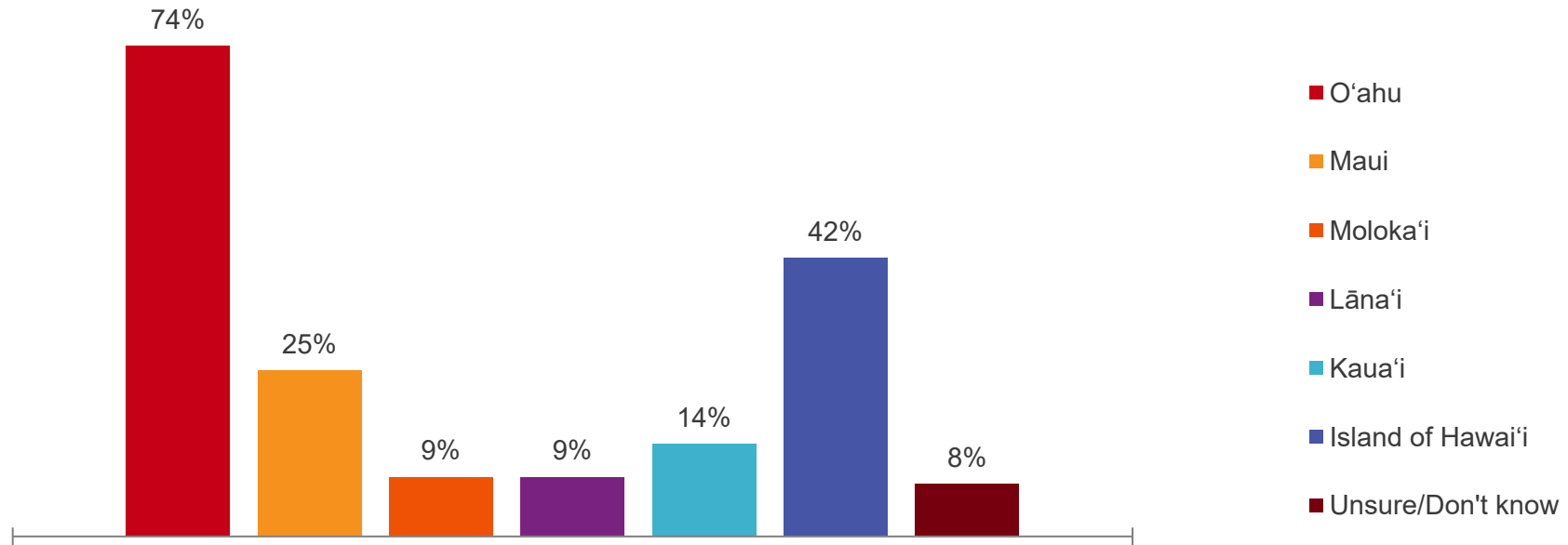
# Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	37%
2	Hawai'i	27%
3	Taiwan	22%
4	Australia	16%
5	Singapore	13%
6	Thailand	12%
7	Guam/Saipan	12%
8	Korea	11%
9	Hong Kong	5%
10	China	4%

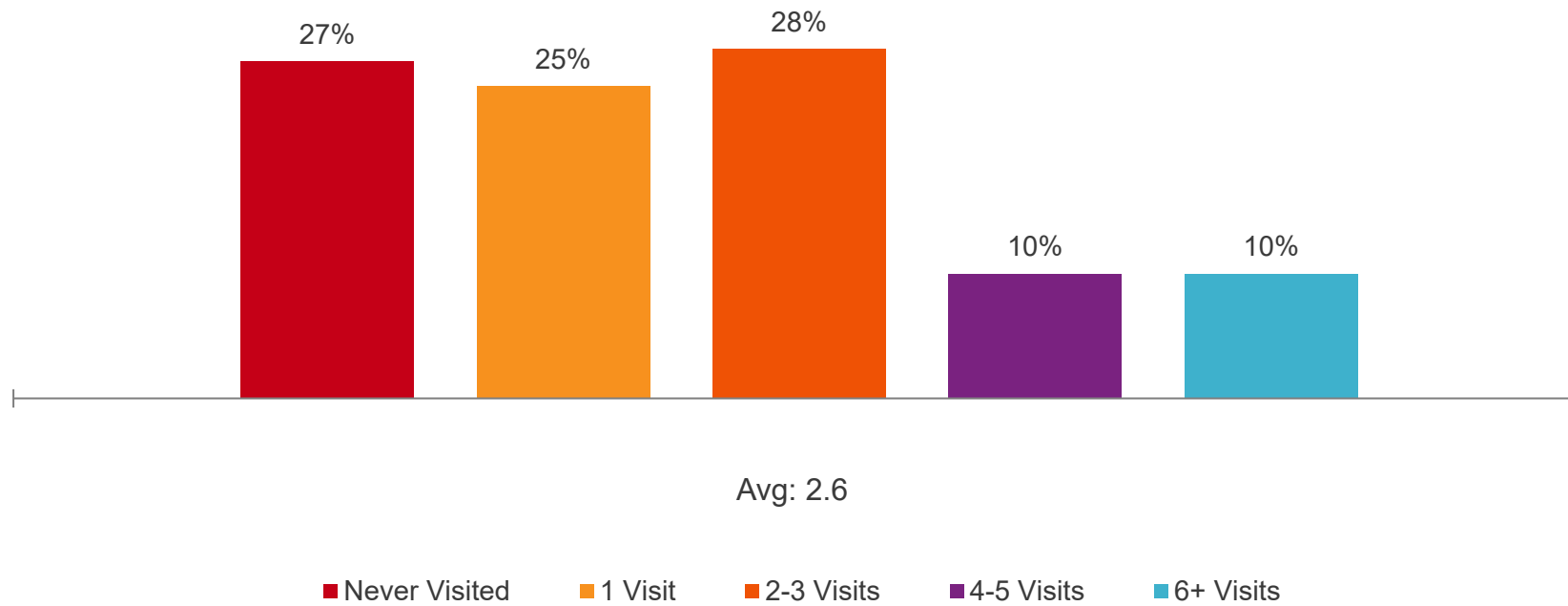
Interested Next 24 Months		
1	Europe	49%
2	Hawai'i	37%
3	Australia	25%
4	Singapore	23%
5	Guam	17%
6	Korea	14%
7	China	7%

Planning Next 12 Months		
1	Europe	23%
2	Hawai'i	16%
3	Australia	8%
4	Singapore	7%
5	Korea	7%
6	Guam	6%
7	China	2%

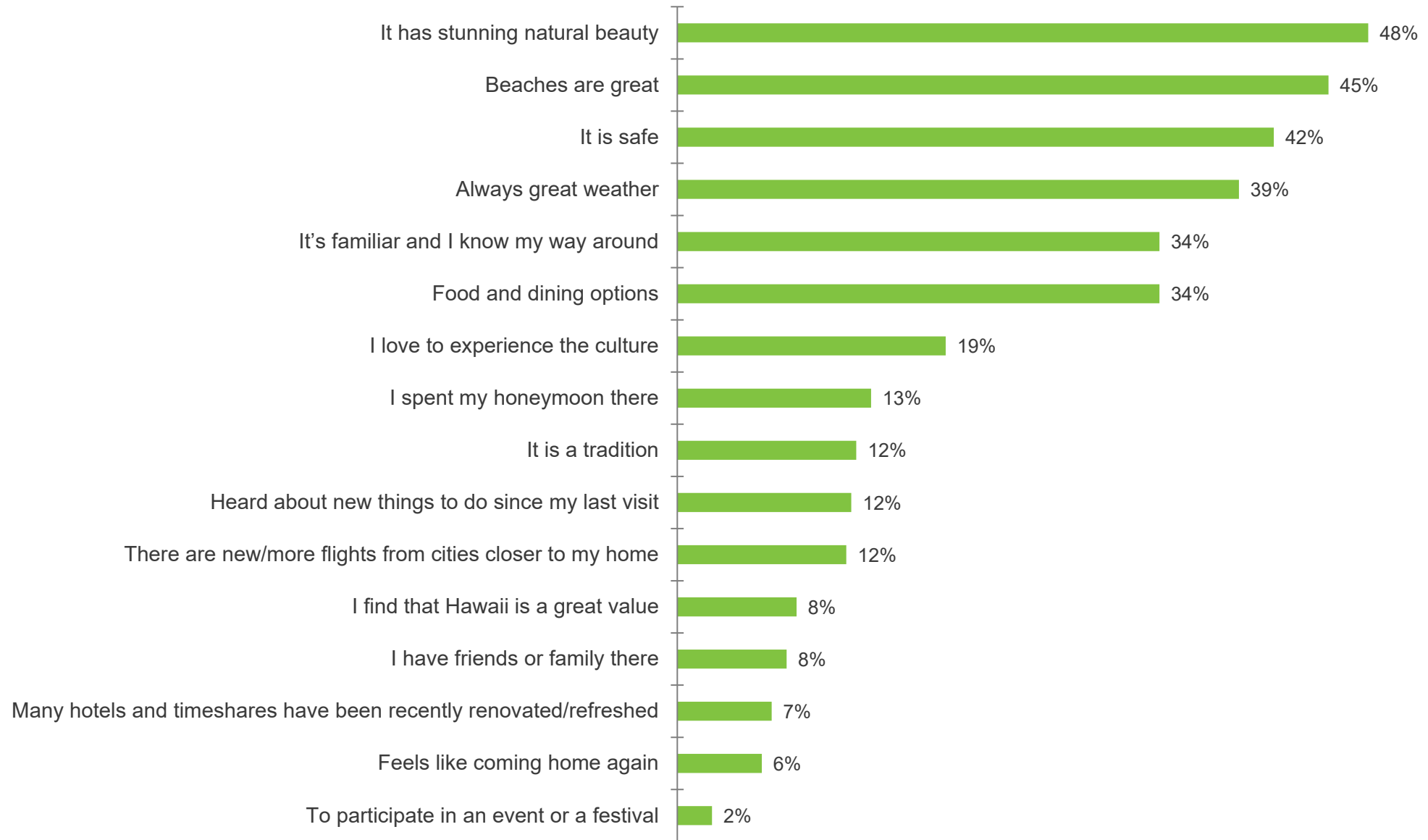
# Hawaiian Islands Plan to Visit Next 12 Months



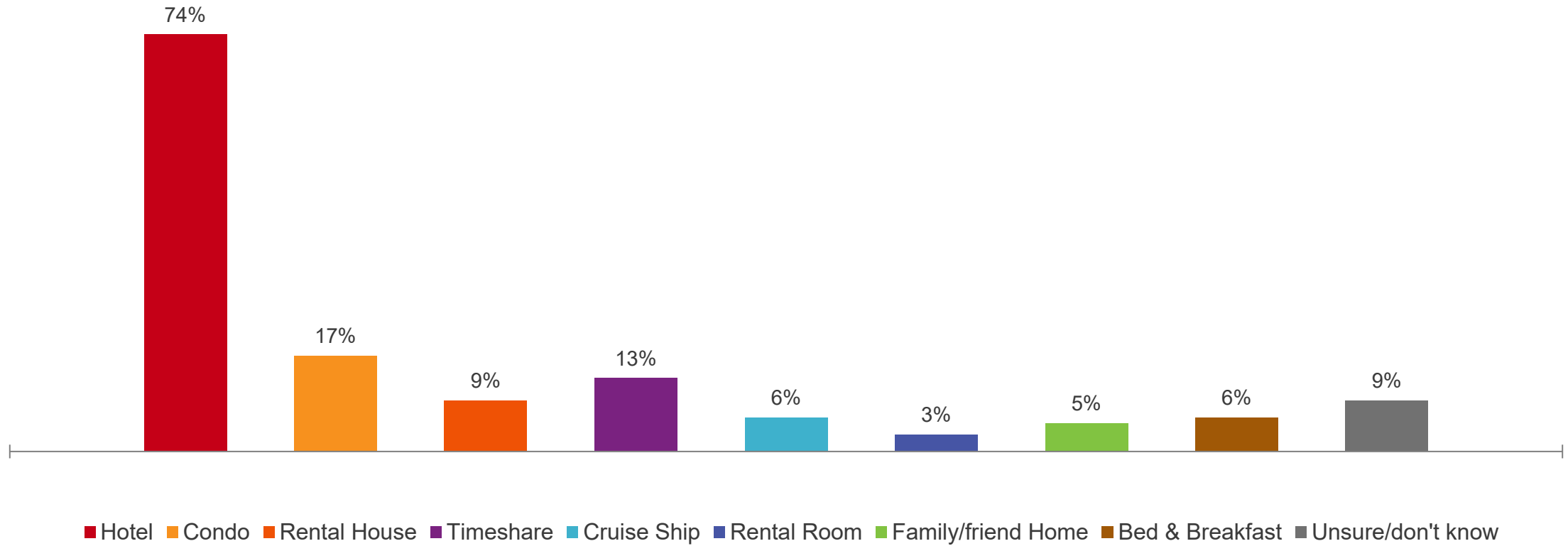
# Number of Times Visited Hawai'i in Lifetime



# Reasons for Returning to Hawai‘i

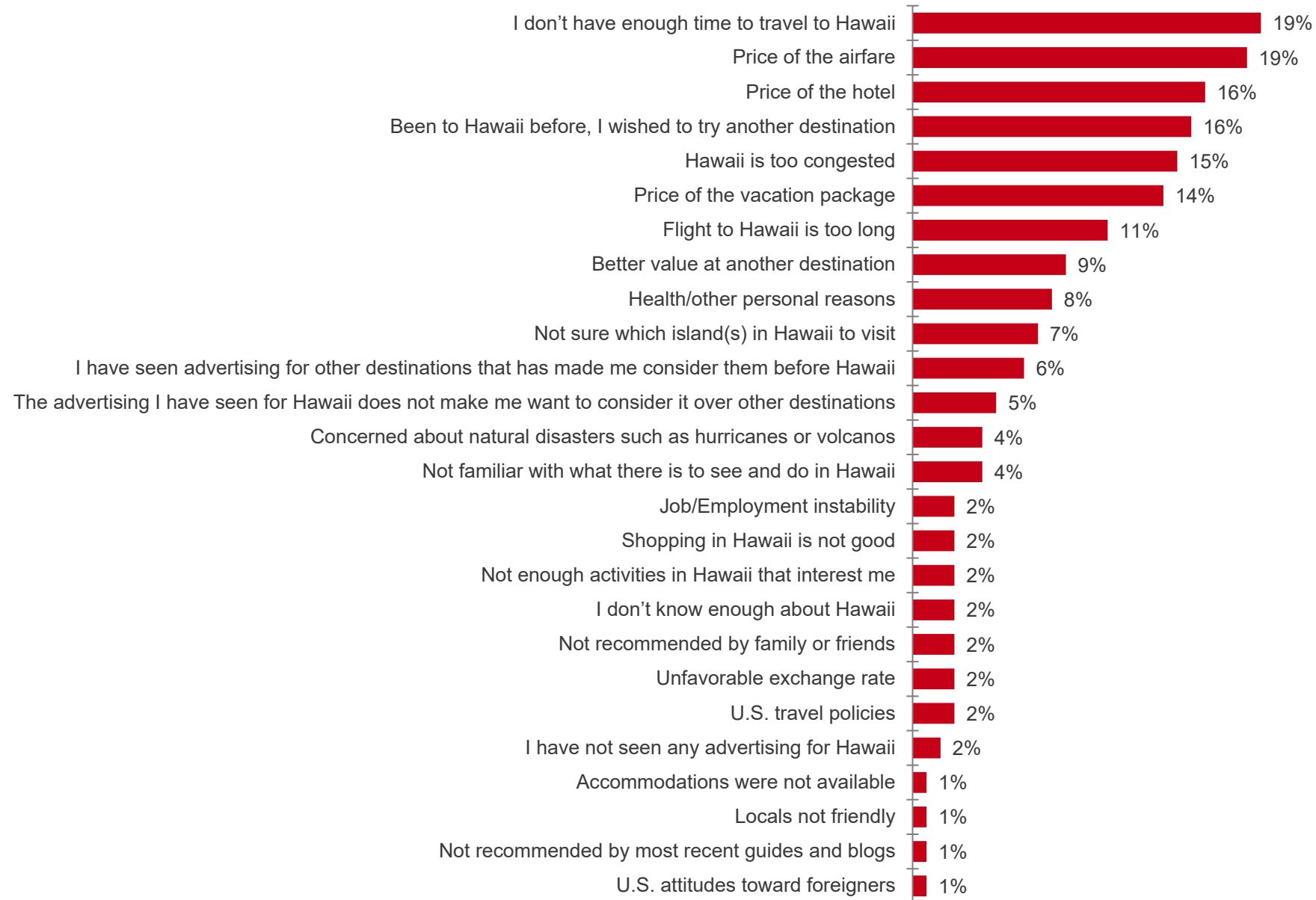


# Hawai'i Planned Accommodations

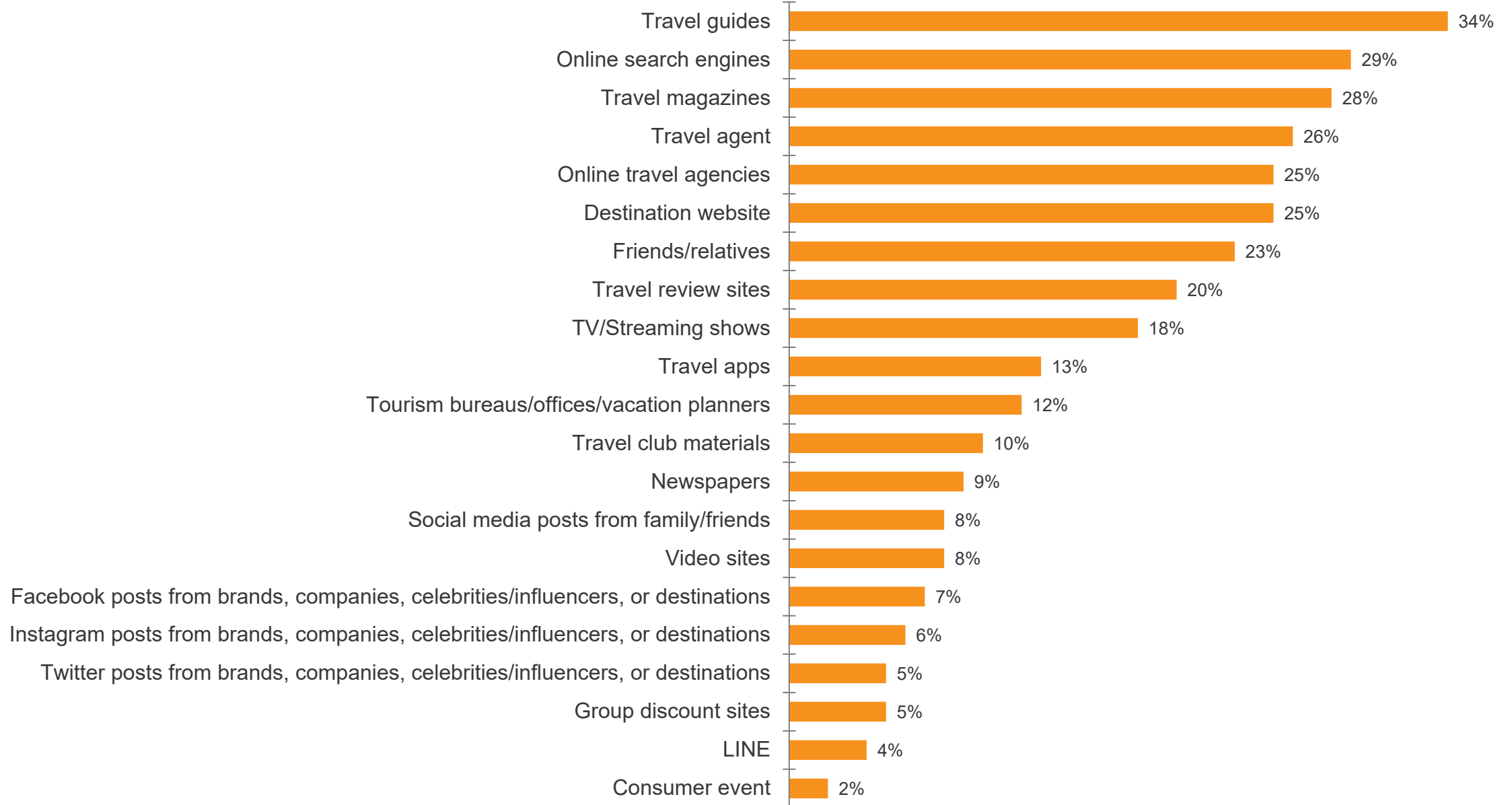




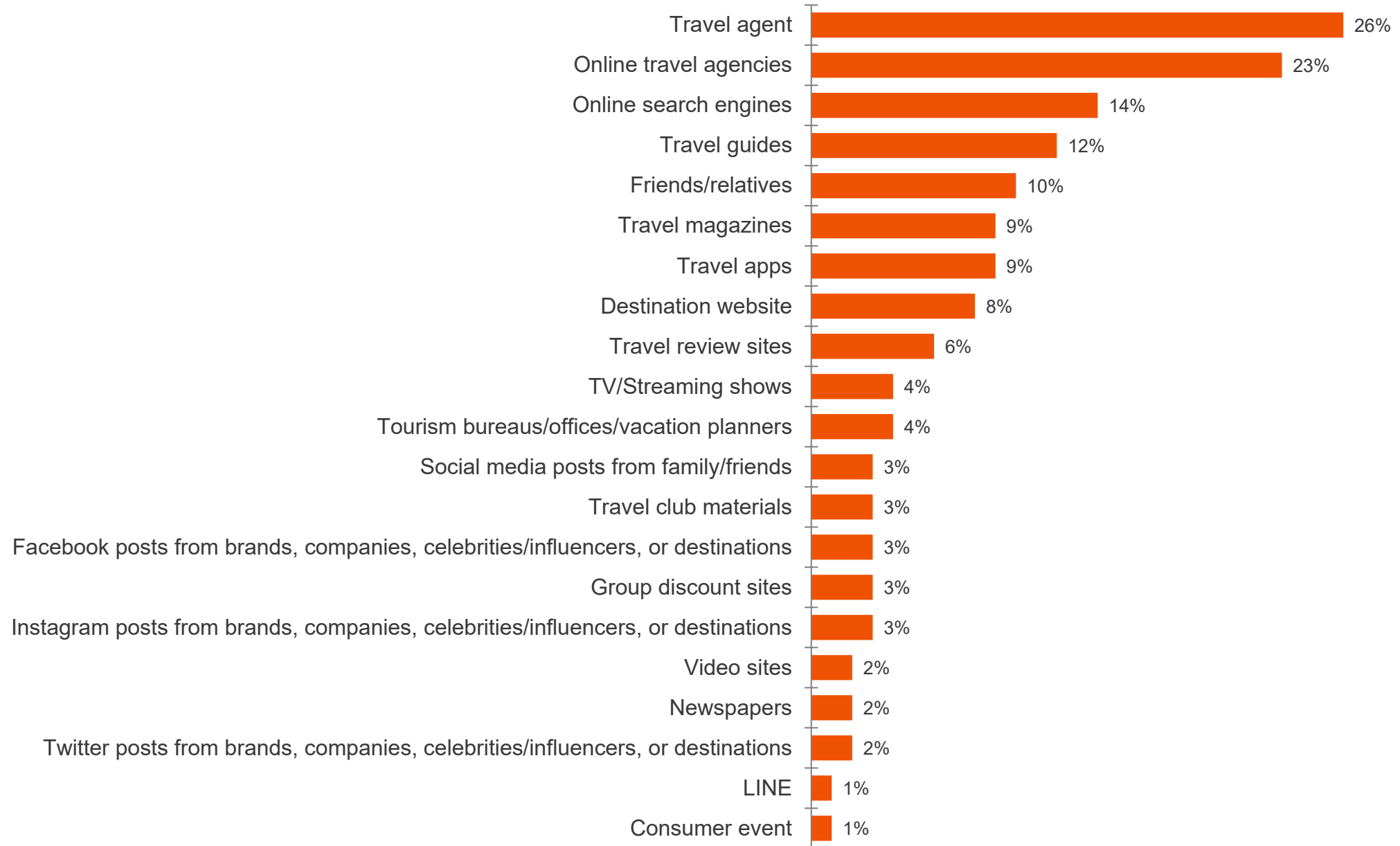
# Reasons for Considering but Not Visiting Hawai'i



# Travel Inspiration Sources



# Travel Planning and Booking Sources



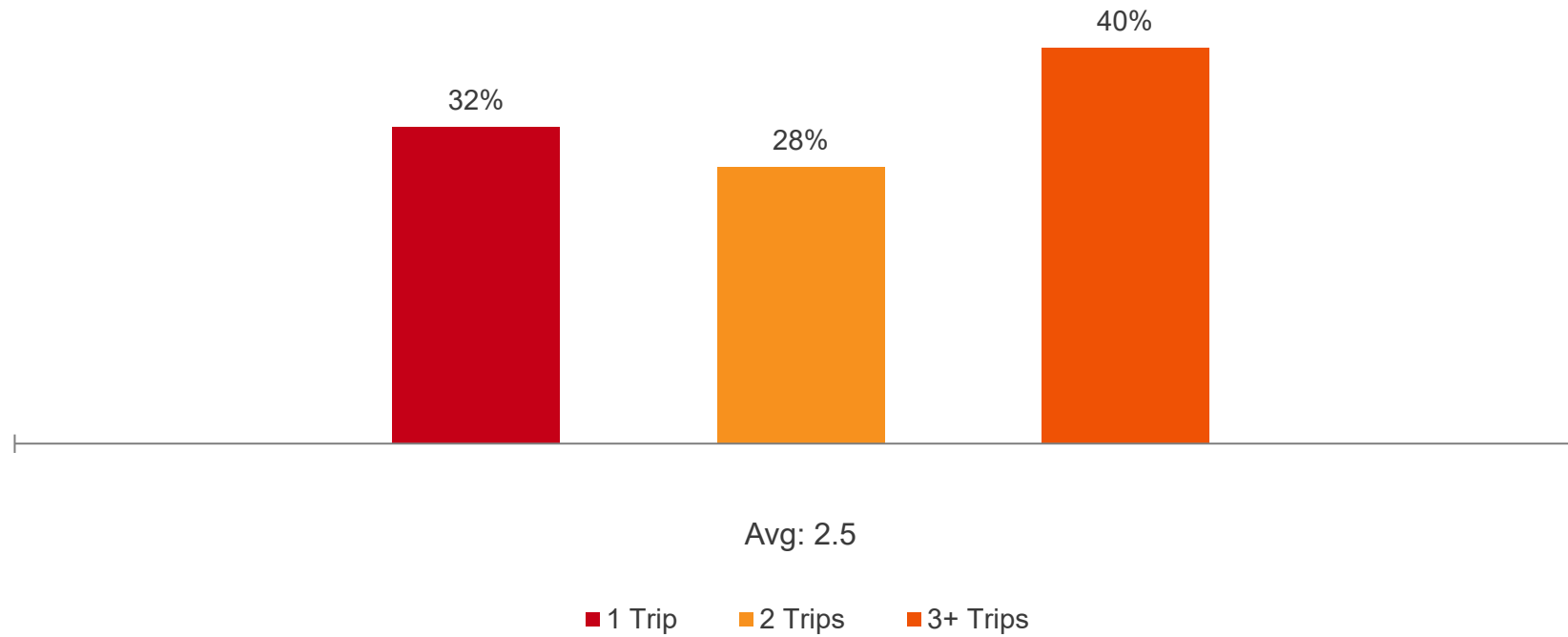
**5**

## **Summary of Markets – Korea**

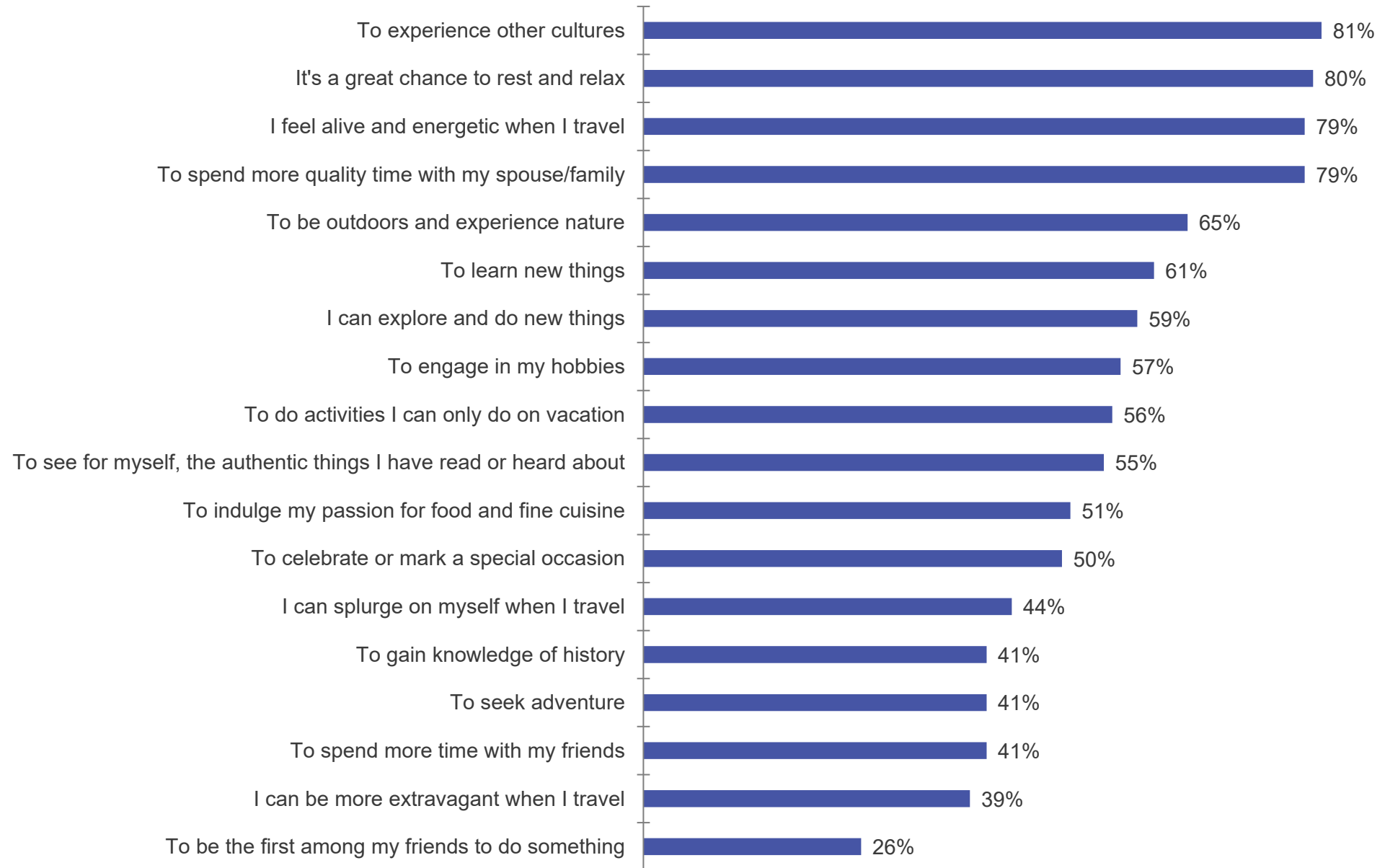
# Demographics by Market

	Korea
<i>Base:</i>	604
<b>Gender</b>	
Male	50%
Female	50%
<b>Marital Status</b>	
Single	31%
Married	65%
<b>Employment</b>	
Full Time Employed	73%
Retired	5%
<b>Education Level</b>	
Graduated College	84%
<b>Children in Household (1+)</b>	
Children at Home	43%
<b>Age</b>	
18-24	15%
25-34	18%
35-44	20%
45-54	24%
55-64	16%
65+	7%
Average	42.8
<b>Household Income</b>	
Under ₩80M	64%
₩80M - ₩110M	26%
₩110M - ₩160M	8%
₩160M+	2%
Average	73,137,417 KRW

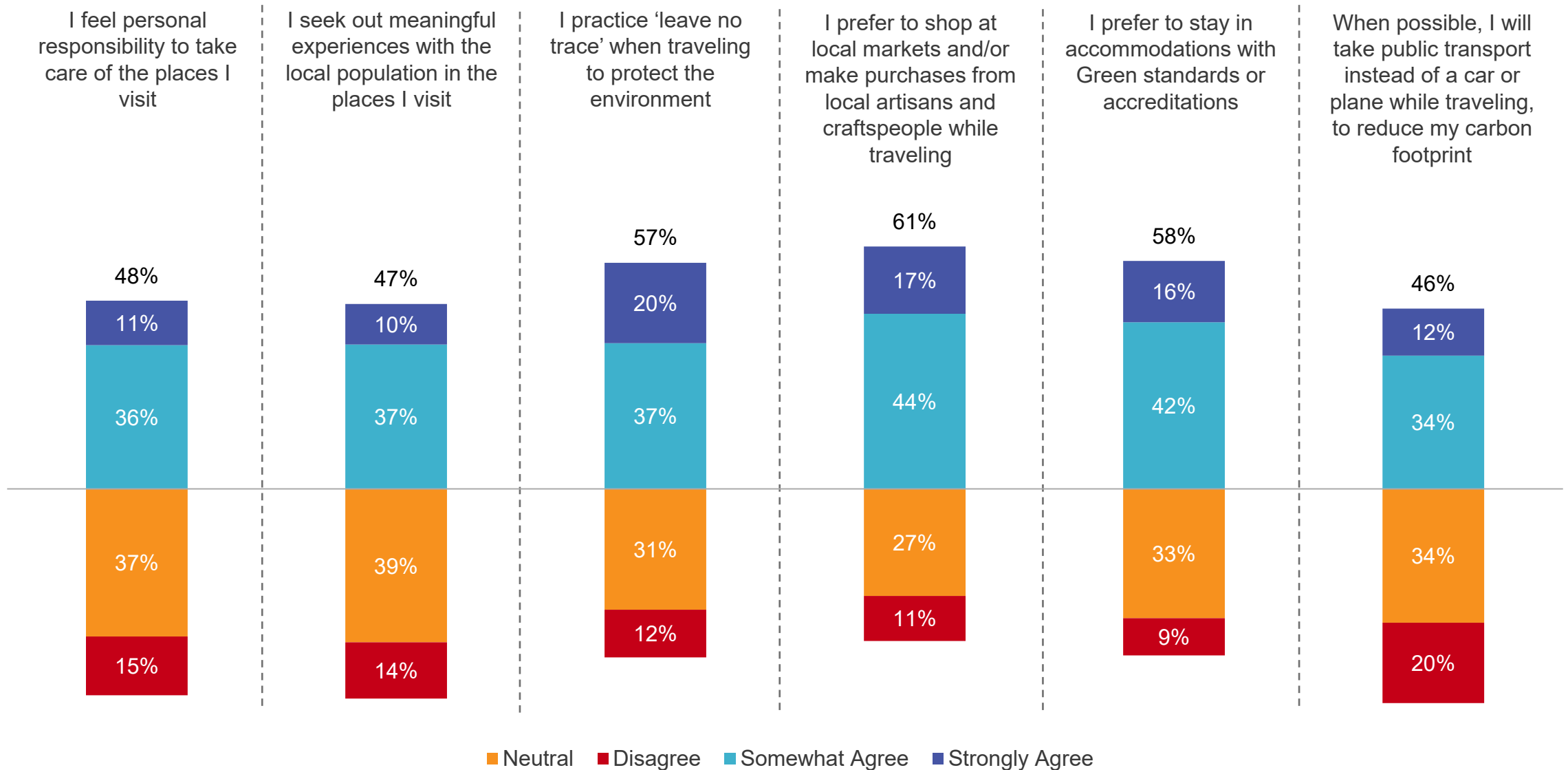
## Number of Leisure Trips Taken in Past 12 Months



## Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



# Sustainability Initiatives





## Destinations Visited Past 3 Years & Past 12 Months

Visited Past 3 Years		
1	South East Asia	59%
2	Japan	56%
3	Europe	31%
4	China	29%
5	USA	24%
6	Australia	16%
7	Hawai'i	13%
8	Maldives	4%

Visited Past Year		
1	Southeast Asia	43%
2	Japan	30%
3	Europe	20%
4	USA	15%
5	China	15%
6	Hawai'i	8%
7	Australia	7%
8	Maldives	3%

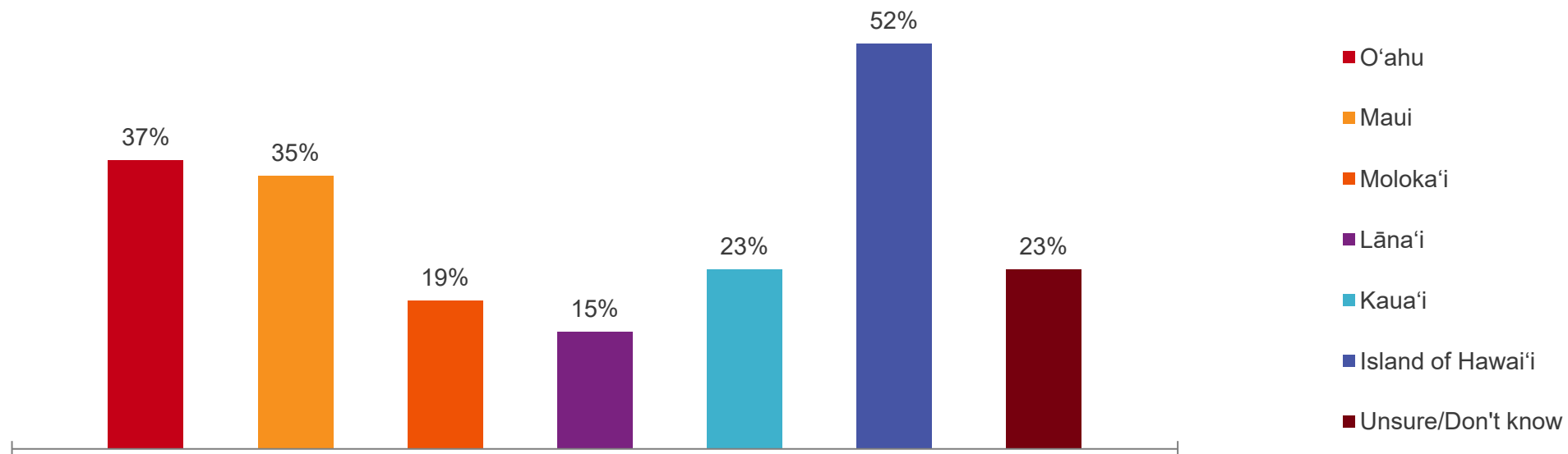
## Destinations Considering for Next Overnight Vacation, Interested Next 24 Months & Planning Next 12 Months

Considering Next Vacation		
1	Europe	48%
2	South East Asia	42%
3	Hawai'i	36%
4	Guam/Saipan	34%
5	USA	28%
6	Australia	26%
7	Japan	22%
8	Maldives	22%

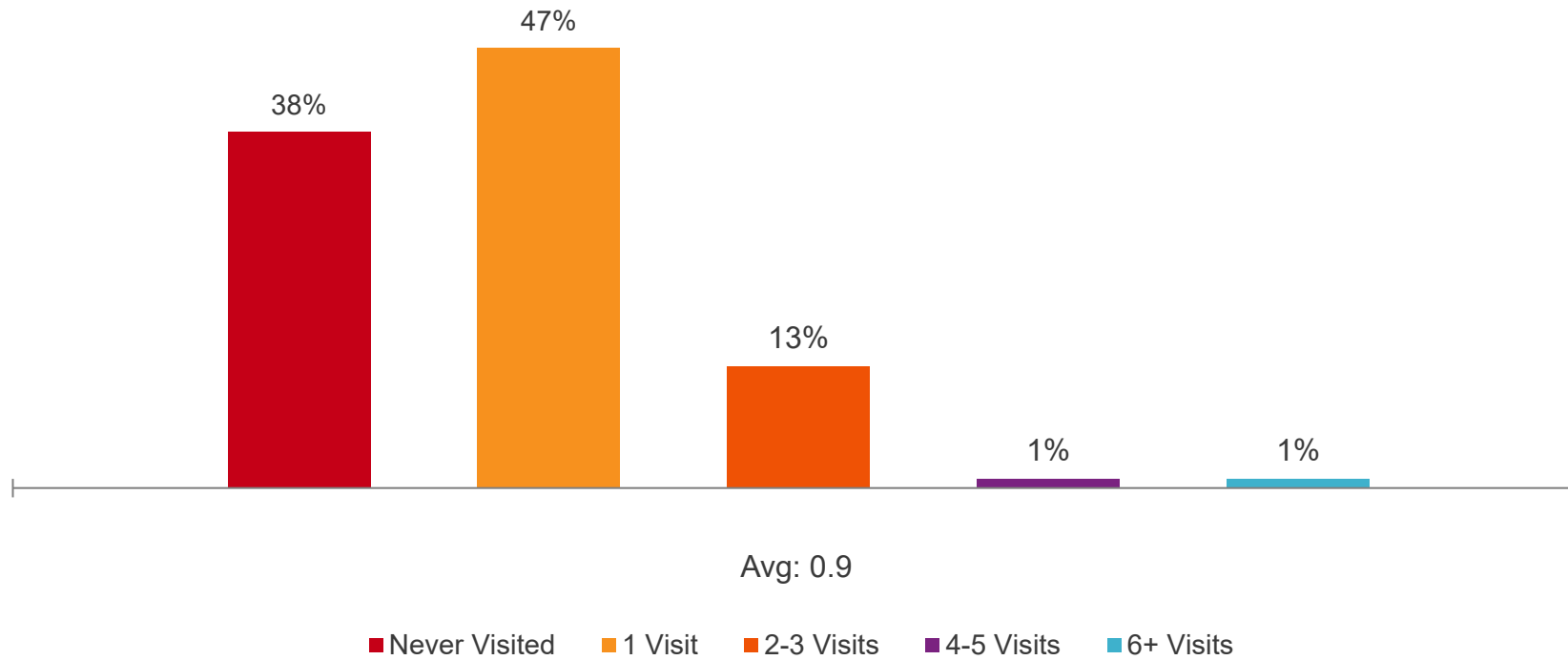
Interested Next 24 Months		
1	Europe	50%
2	Hawai'i	42%
3	South East Asia	37%
4	USA	34%
5	Australia	31%
6	Maldives	25%
7	Japan	20%
8	China	10%

Planning Next 12 Months		
1	Europe	31%
2	Southeast Asia	27%
3	Hawai'i	21%
4	USA	17%
5	Australia	15%
6	Japan	14%
7	Maldives	12%
8	China	5%

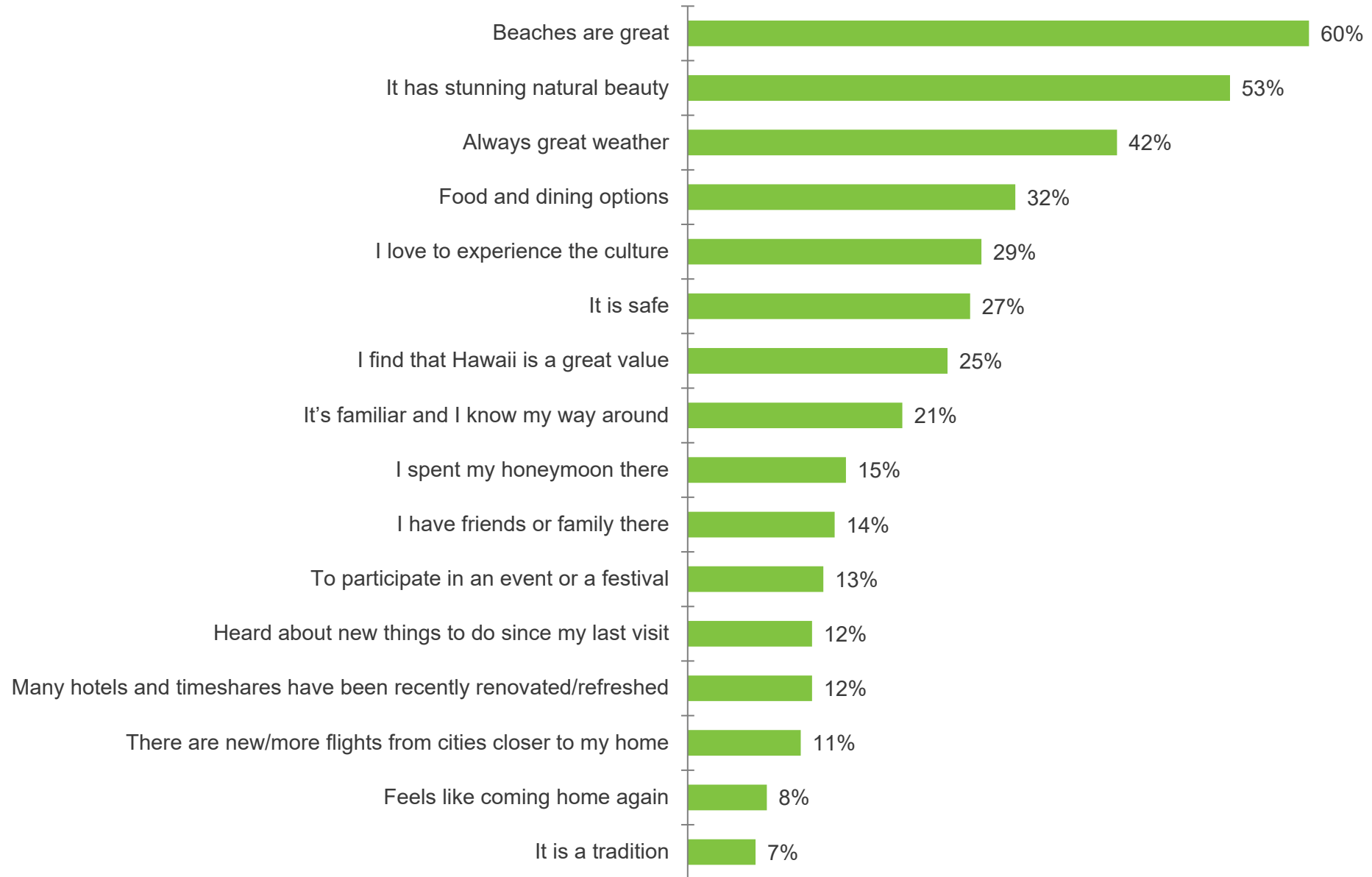
## Hawai'i Islands Plan to Visit Next 12 Months



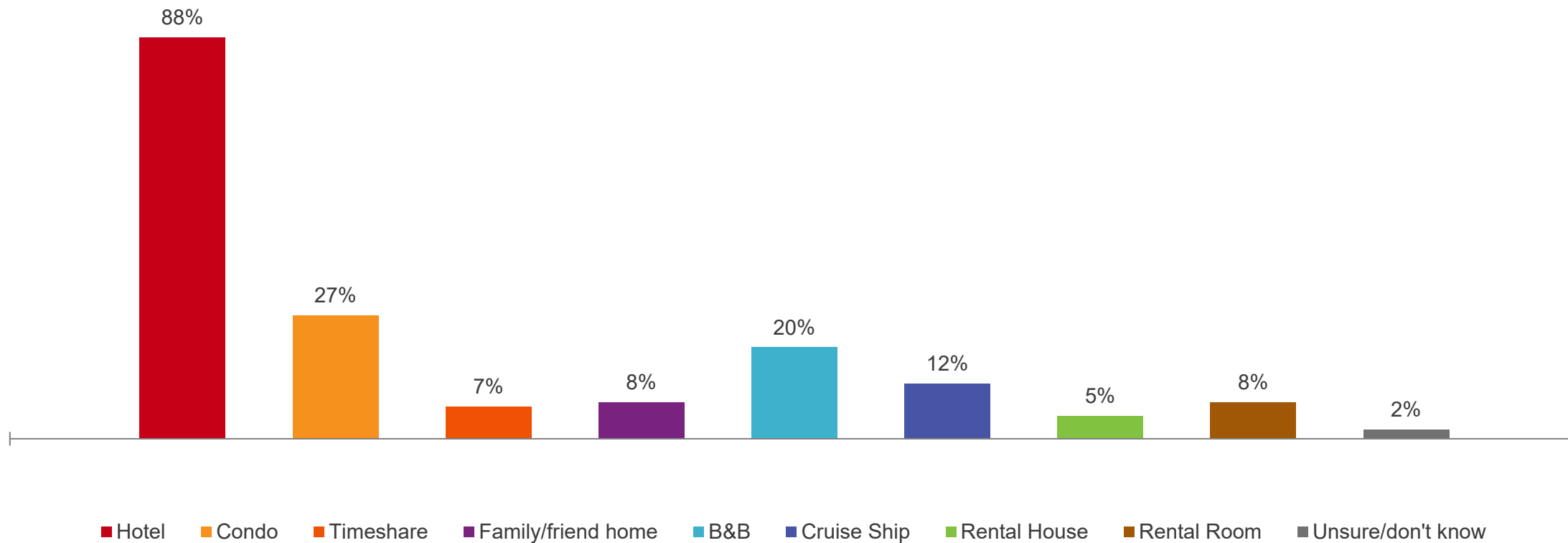
# Number of Times Visited Hawai'i in Lifetime



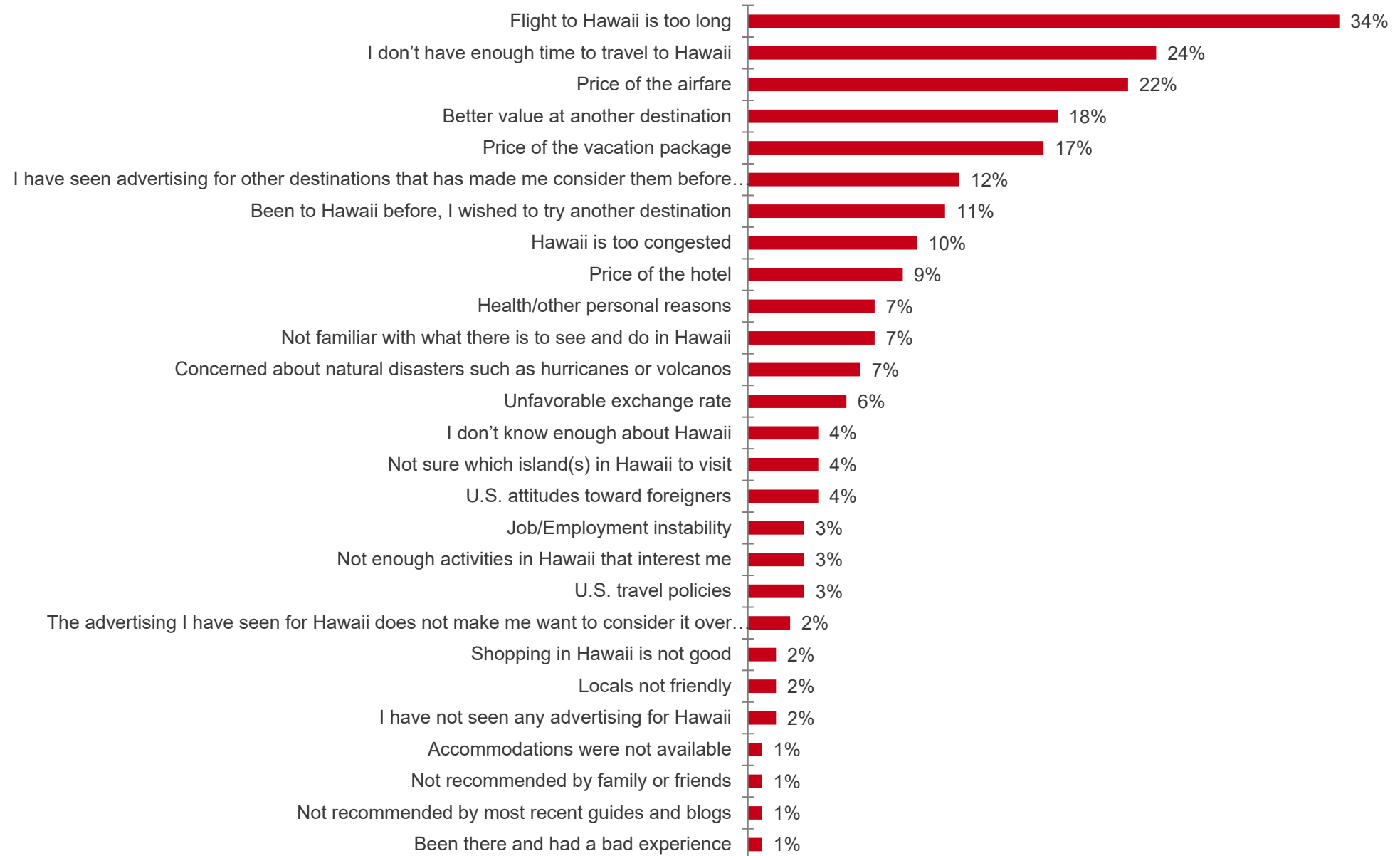
## Reasons for Returning to Hawai'i



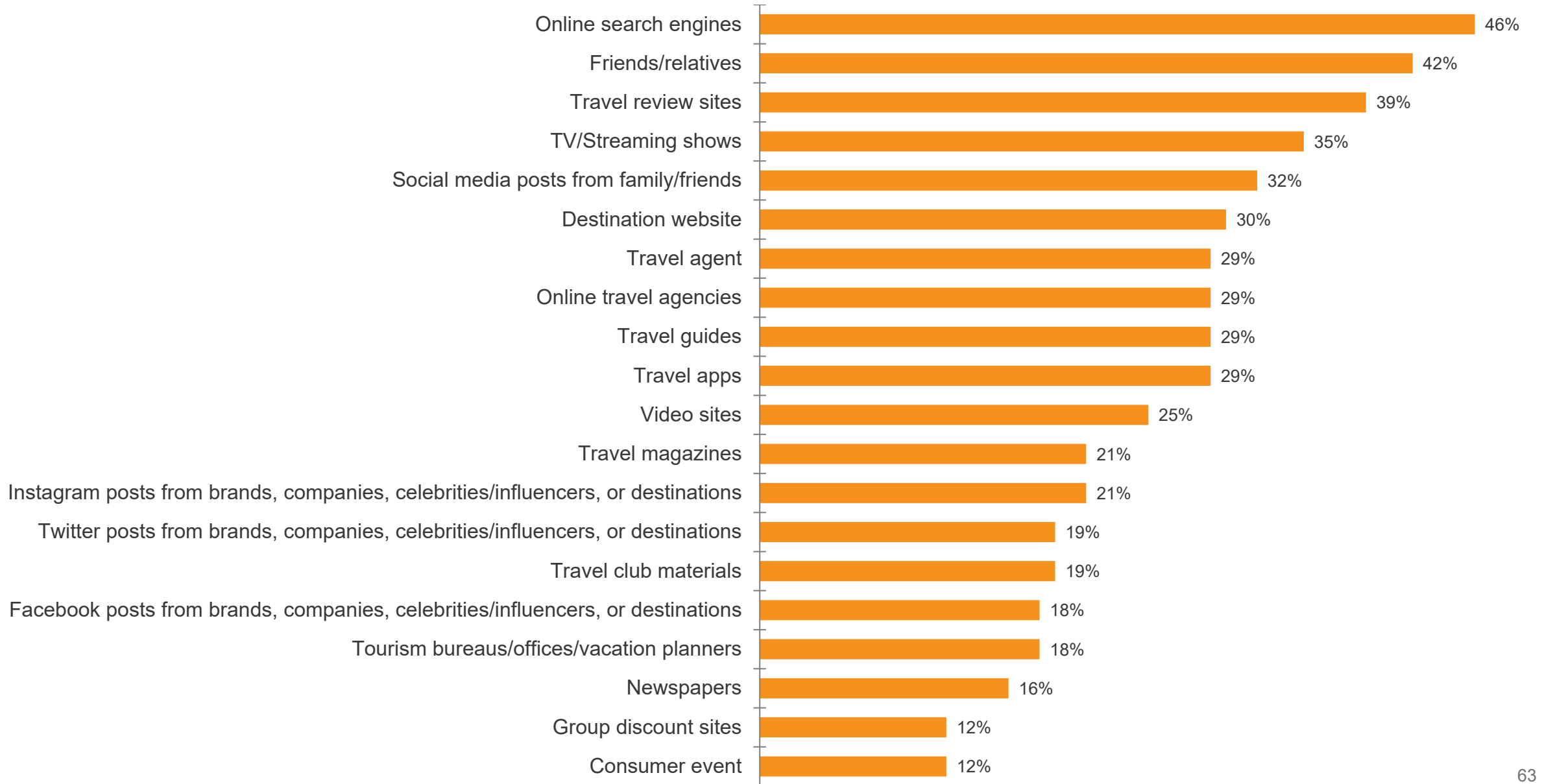
## Hawai'i Planned Accommodations



## Reasons for Considering but Not Visiting Hawai'i



# Travel Inspiration Sources





# Travel Planning and Booking Sources



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## **Methodology**

# Methodology

## Target Audience/Markets

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- Random sample of U.S, Canada, Japan, and Korea residents
- US: 1,200 sample
  - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
  - U.S. West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
  - U.S. East includes all continental states not in U.S West region
- Canada: 600 sample
  - Traveled for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher
- Japan: 600 sample
  - Traveled internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher (~\$40,000 USD)
- Korea: 600 sample
  - Traveled internationally for leisure in past 24 months with household income of 30,000,000 or higher (~\$26,000 USD)

## Timeframe

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- Wave 3: Data collection January – February 2020 for media coverage between January – June 2019

## Survey Methodology

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- Online surveys taken by LSR panelists
- Paid media consumption measured through recognition of ads via TV/video, untagged digital, and social media
- Owned media recognition of Hawai'i channels, including website, YouTube, Facebook, or Instagram
- Earned media recall of articles and stories