

# Hawai'i Marketing Effectiveness Study

2015-2018 – Wave 4/6

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Senior Director, Client Insights

**MMGY GLOBAL**

**MMGY** GLOBAL WAS ESTABLISHED IN 1981, WITH ONE GOAL:  
TO CREATE THE BEST  
TRAVEL MARKETING ORGANIZATION IN THE WORLD.

WE NOW EXECUTE STRATEGIES AND TACTICS ACROSS ALL MARKETING  
DISCIPLINES WITHIN ONE INTEGRATED COMPANY. WE UNDERSTAND WHERE  
TRAVELERS ARE GOING, HOW THEY THINK AND WHY THEY WANT TO GO  
PLACES.

TODAY WE REPRESENT A COLLECTION OF BRANDS THAT PROVIDE BEST-IN-  
CLASS SERVICES FOR TRAVEL, TOURISM AND HOSPITALITY COMPANIES  
FROM ACROSS THE GLOBE. TOGETHER WE INSPIRE PEOPLE TO GO PLACES.

**DK SHIFFLET**

**DK** SHIFFLET SPECIALIZES IN SYNDICATED AND CUSTOM RESEARCH FOR THE TRAVEL AND TOURISM INDUSTRY, PROVIDING THE INDUSTRY'S MOST COMPLETE TRAVEL DATA ON U.S. RESIDENTS AND THEIR TRAVEL WORLDWIDE.

**DK** SHIFFLET'S ONGOING *DIRECTIONS* TRAVEL INTELLIGENCE SYSTEM ADDS DETAILED TRAVEL DATA FOR OVER 60,000 TRAVELING HOUSEHOLDS TO OUR DATABASE ANNUALLY, PROVIDING THE UNIQUE ABILITY TO IDENTIFY TRENDS AND FORECAST U.S. TRAVEL BEHAVIOR.

# Purpose and Methodology

# Study Purpose

**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 core markets 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**

# Methodology

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

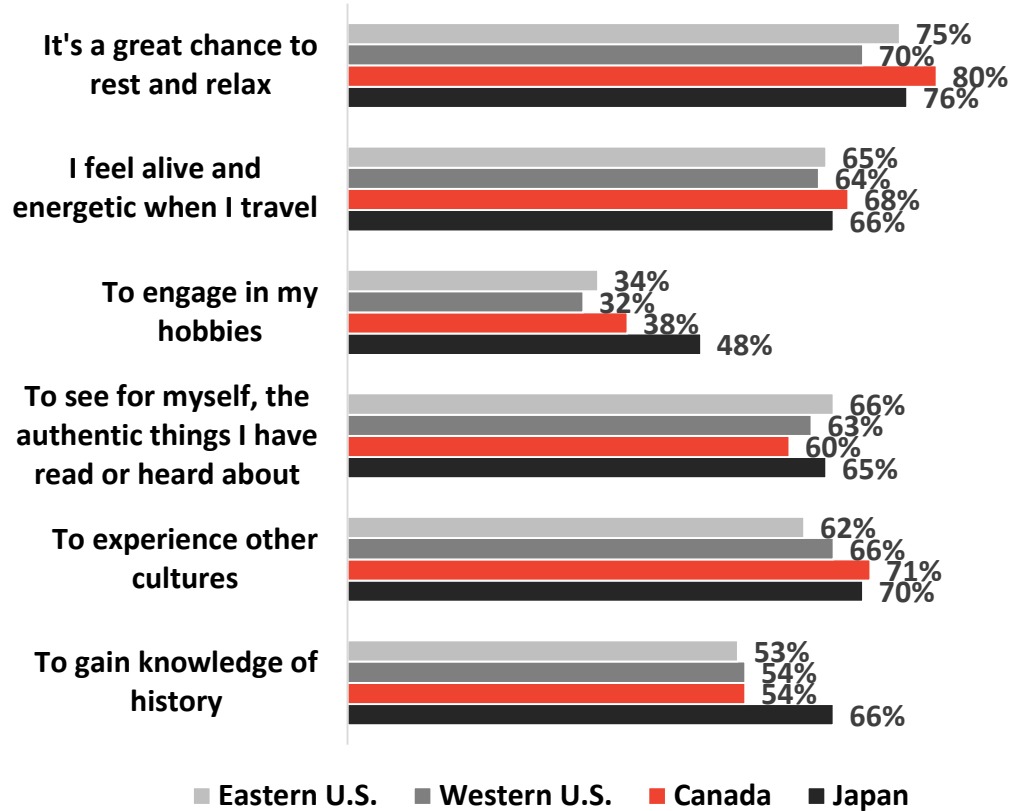
Qualified respondents from each major marketing area were required to meet specific requirements for inclusion in this study:

- **Eastern/Western U.S.**
  - 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
- **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 an international Leisure trip in the past 24 months
  - Household income of ¥2,000,000
  - 18 years of age or older



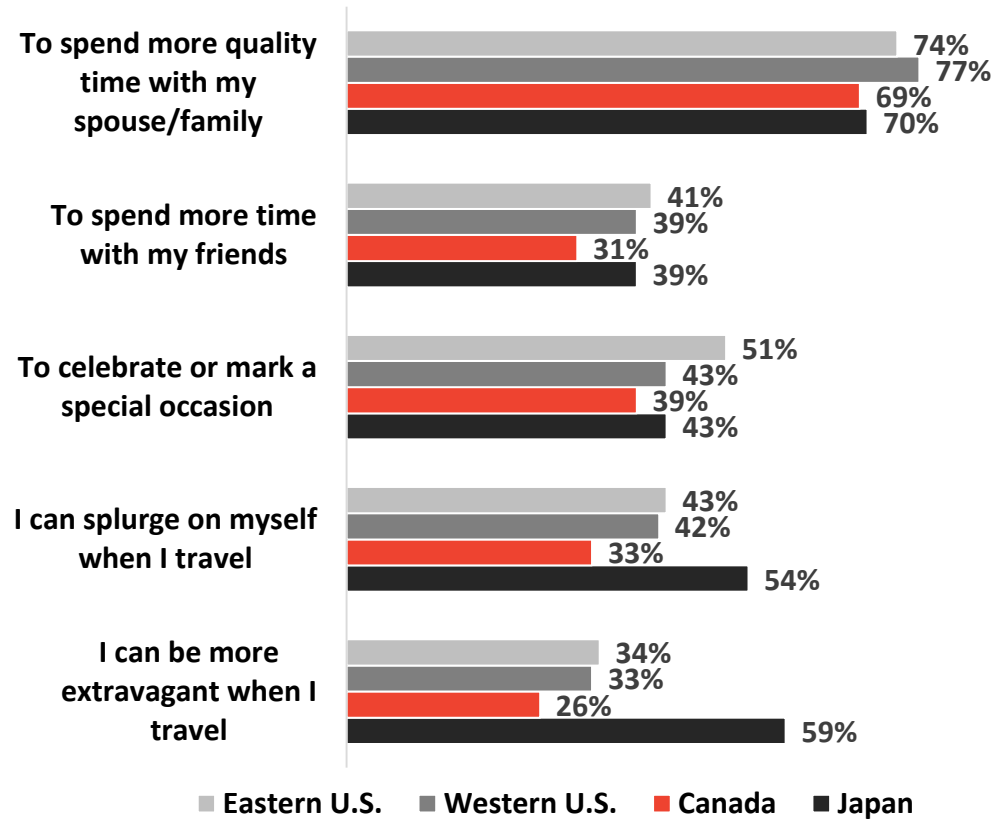
**Why do People Travel?**

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



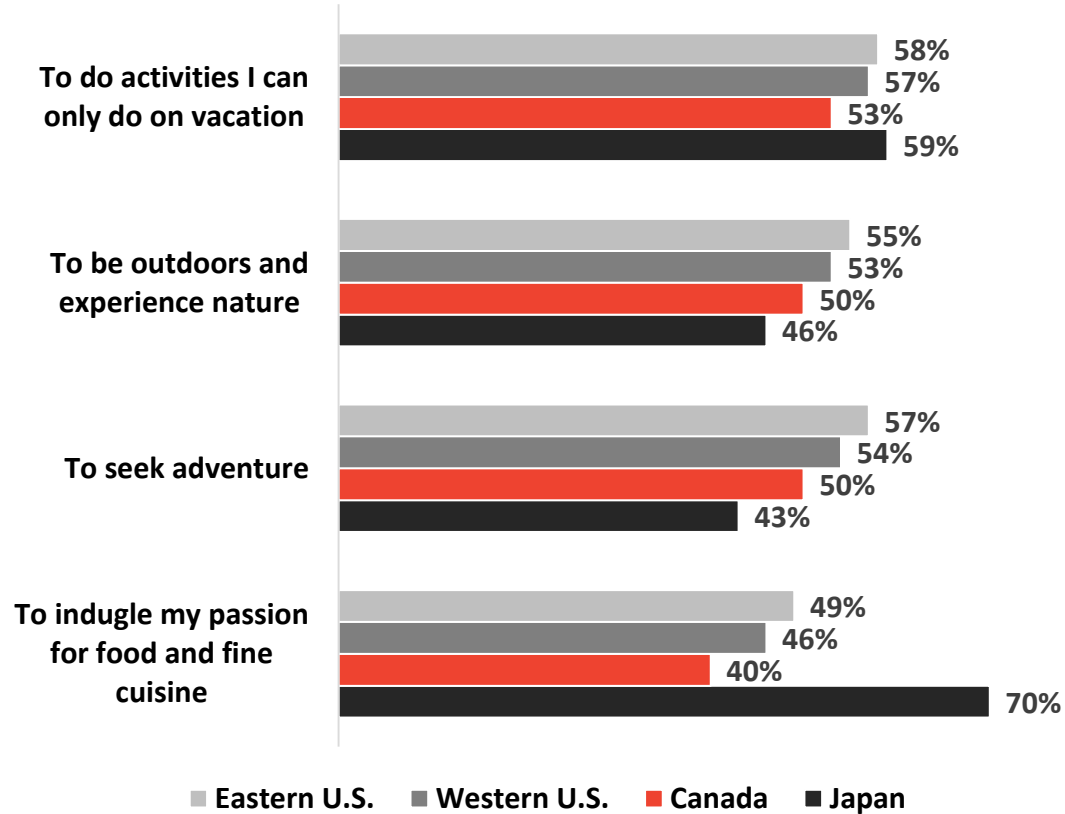
Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

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



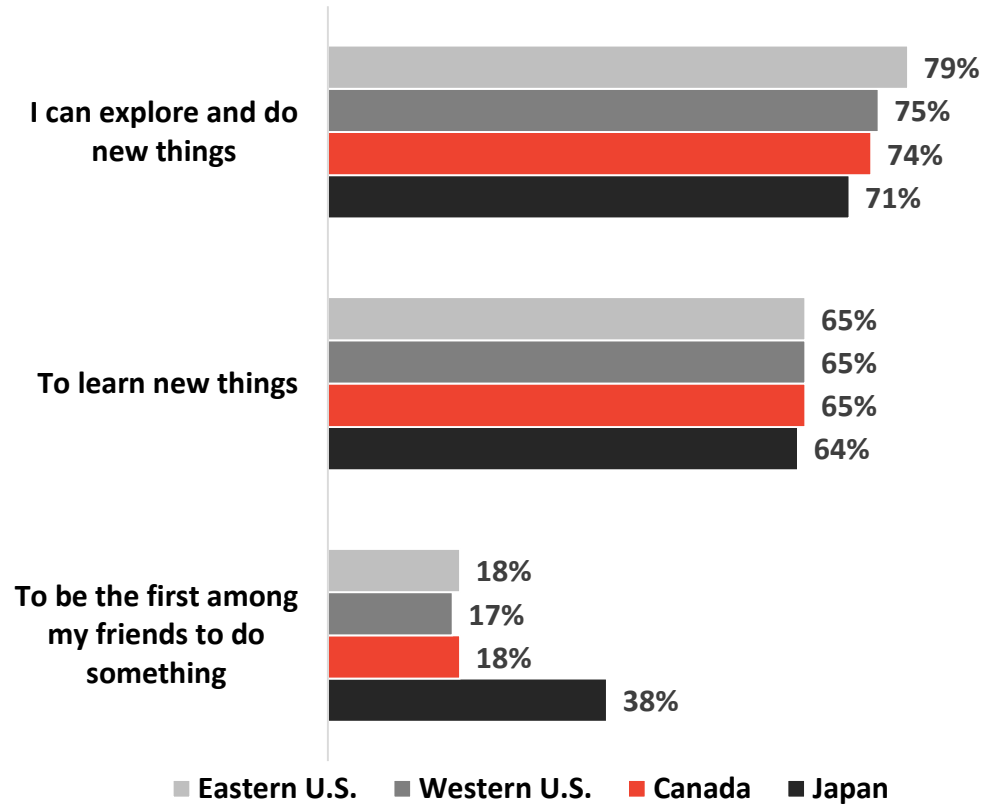
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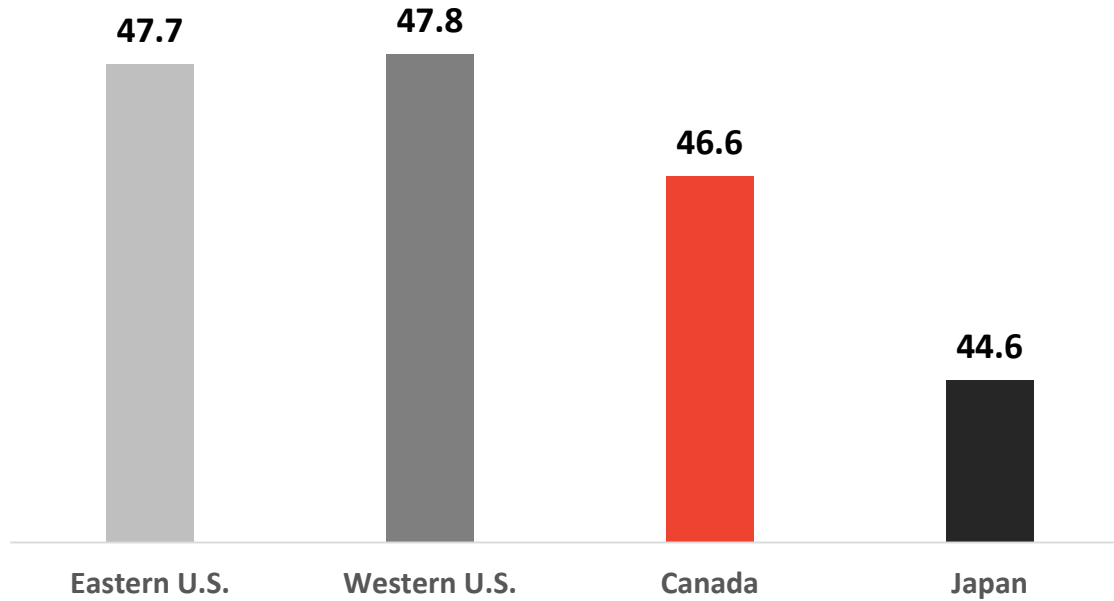
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## REASONS FOR TAKING A LEISURE VACATION ANYWHERE (% TOP 2 BOX)



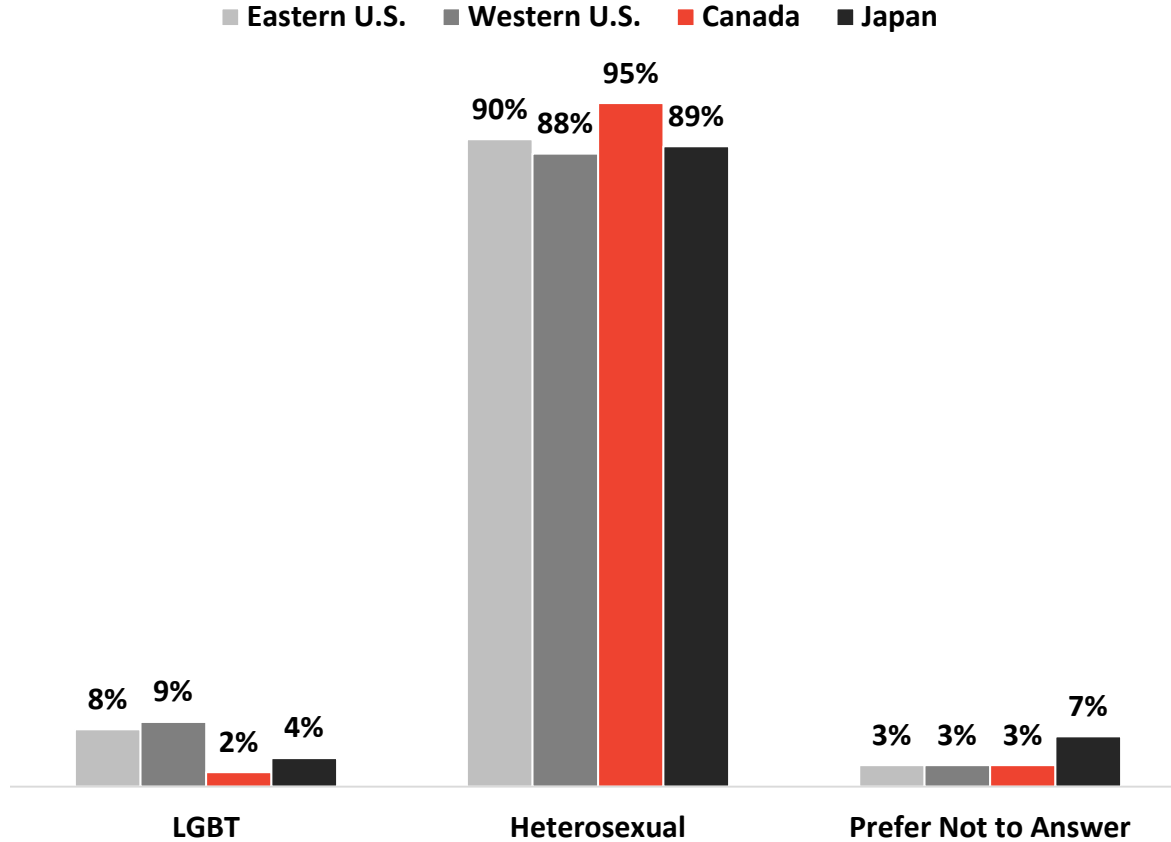
Q4a: Why do you take vacations? Using the scale below, please indicate how important each of the following reasons is to you for taking a vacation. (1=Not at all Important, 5=Extremely Important)

Who are the Visitors?



QS3. Which of the following categories includes your age?

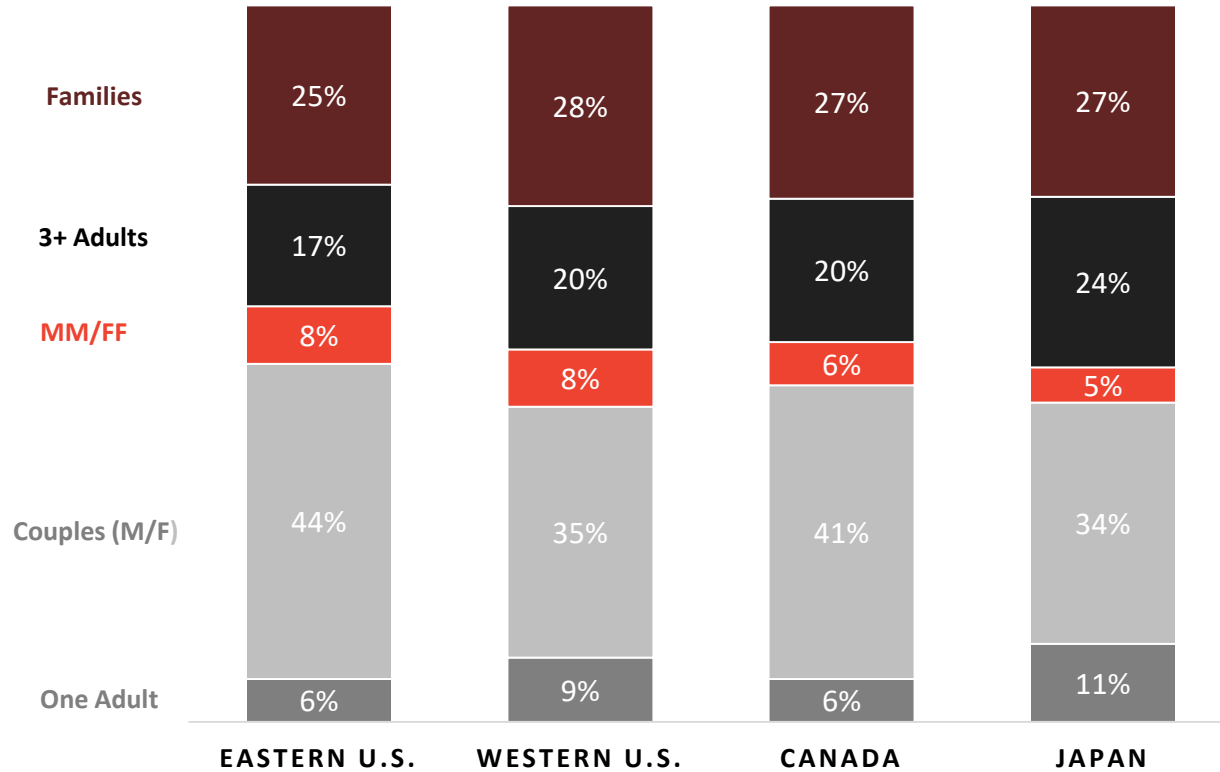
## DEMOGRAPHICS – SEXUAL ORIENTATION



Q55. Do you consider yourself to be: LGBT, Heterosexual, Prefer not to answer

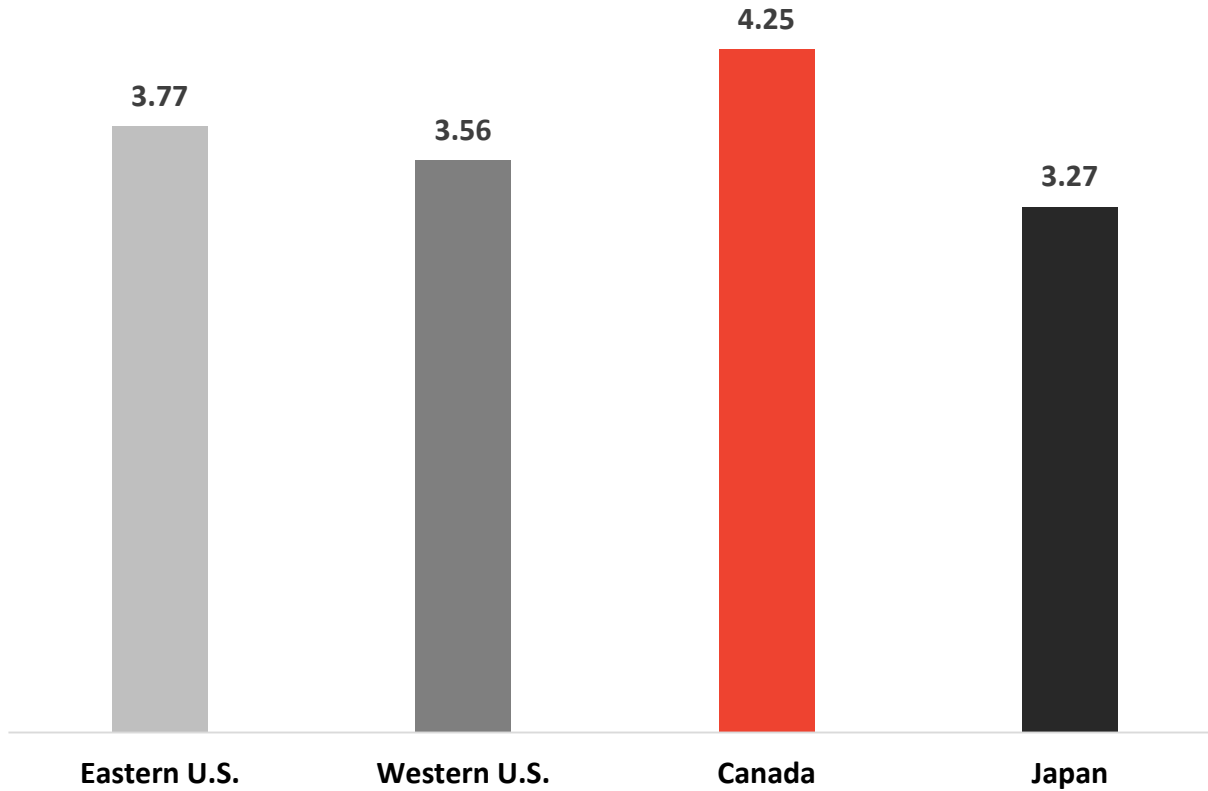


## TRAVEL PARTY COMPOSITION (SHARE)



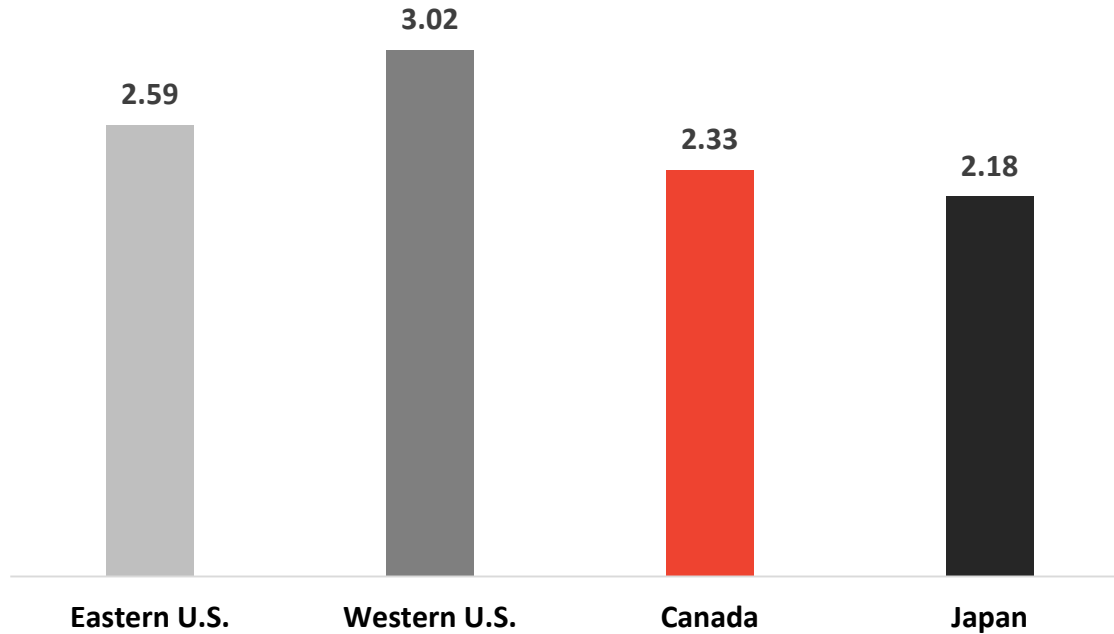
Q16: Including yourself, how many people were in your travel party on your most recent leisure trip to Hawai'i?

## AVERAGE TRAVEL PARTY SIZE (MOST RECENT TRIP)



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

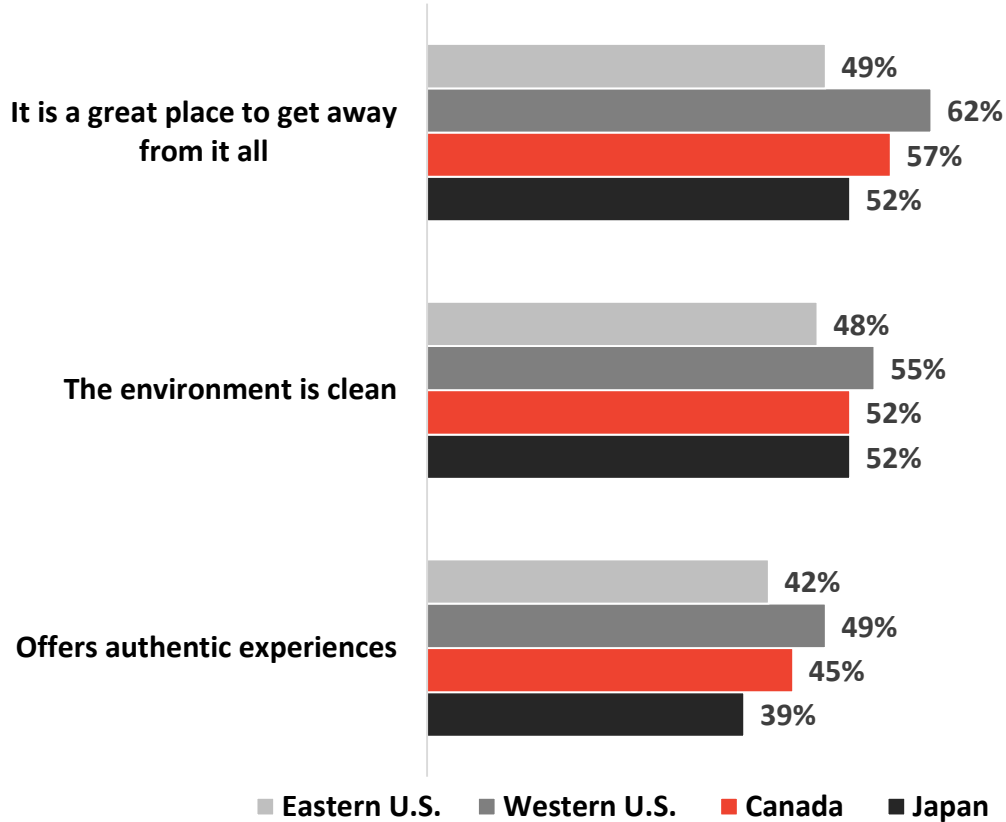
## DEMOGRAPHICS – AVERAGE NUMBER OF LONG DISTANCE OVERNIGHT TRIPS IN PAST 12 MONTHS



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

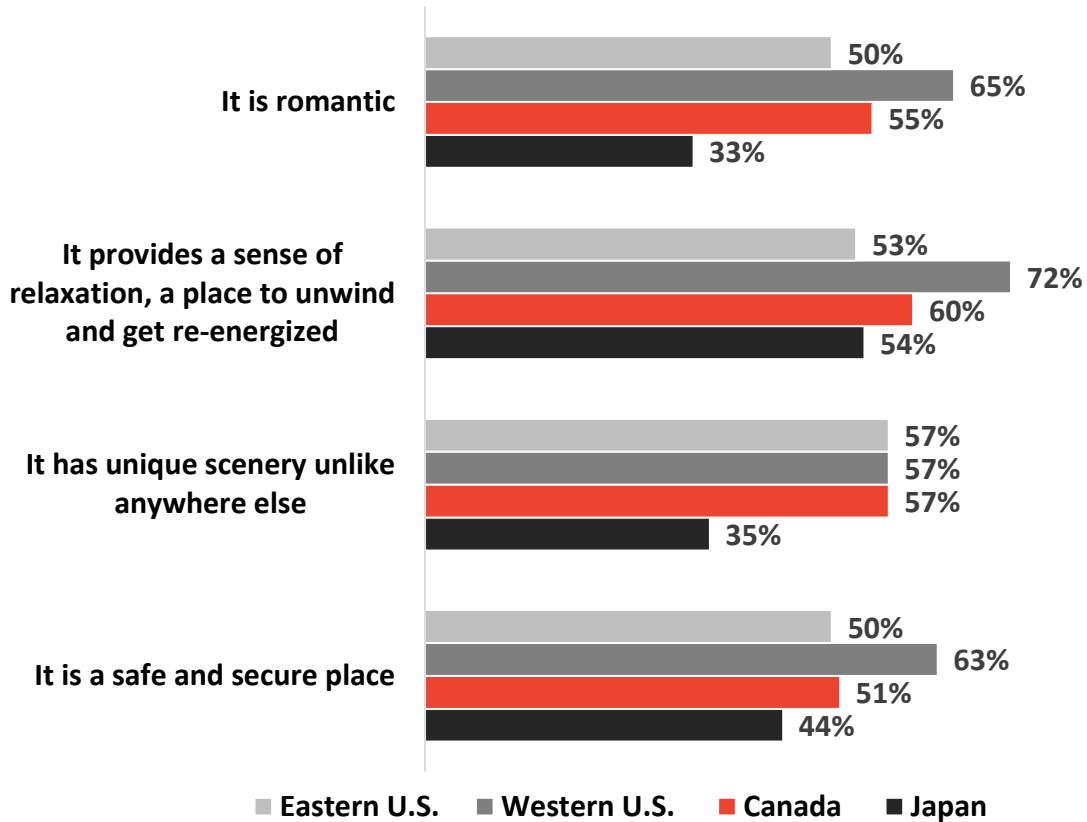
# Strengths of Hawai'i as a Destination

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



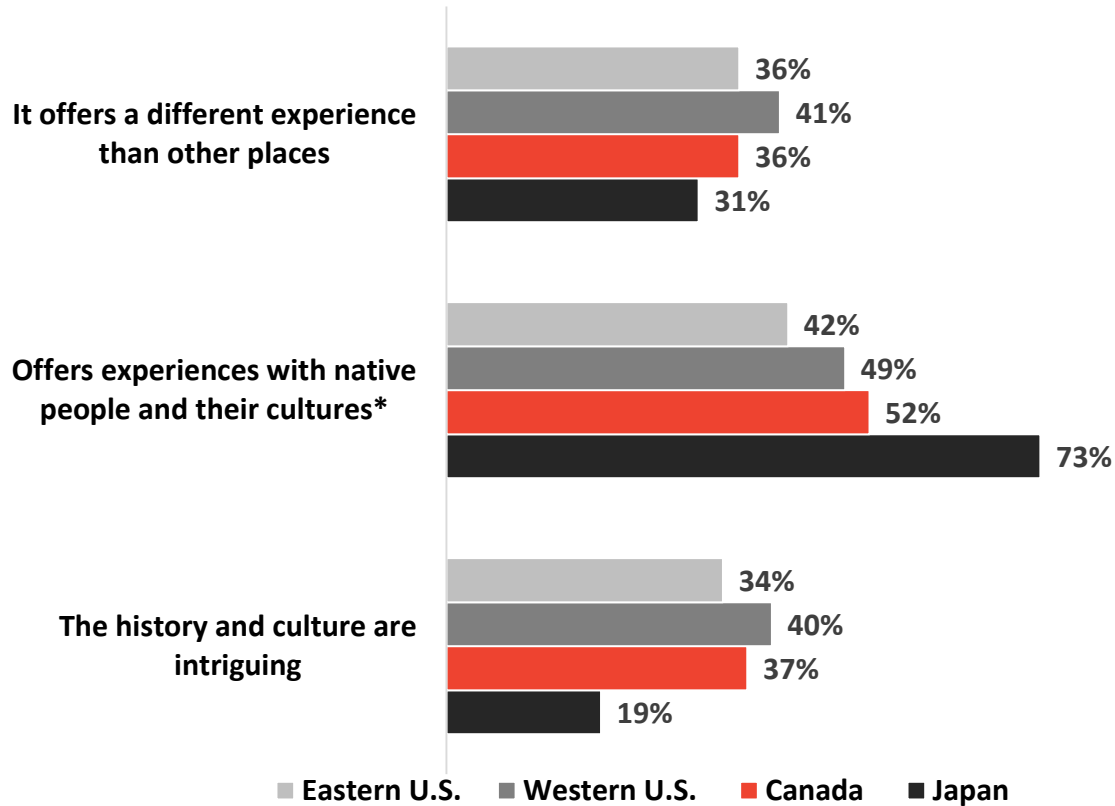
Q6a: For each attribute, please select the destination(s) to which it applies.

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



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

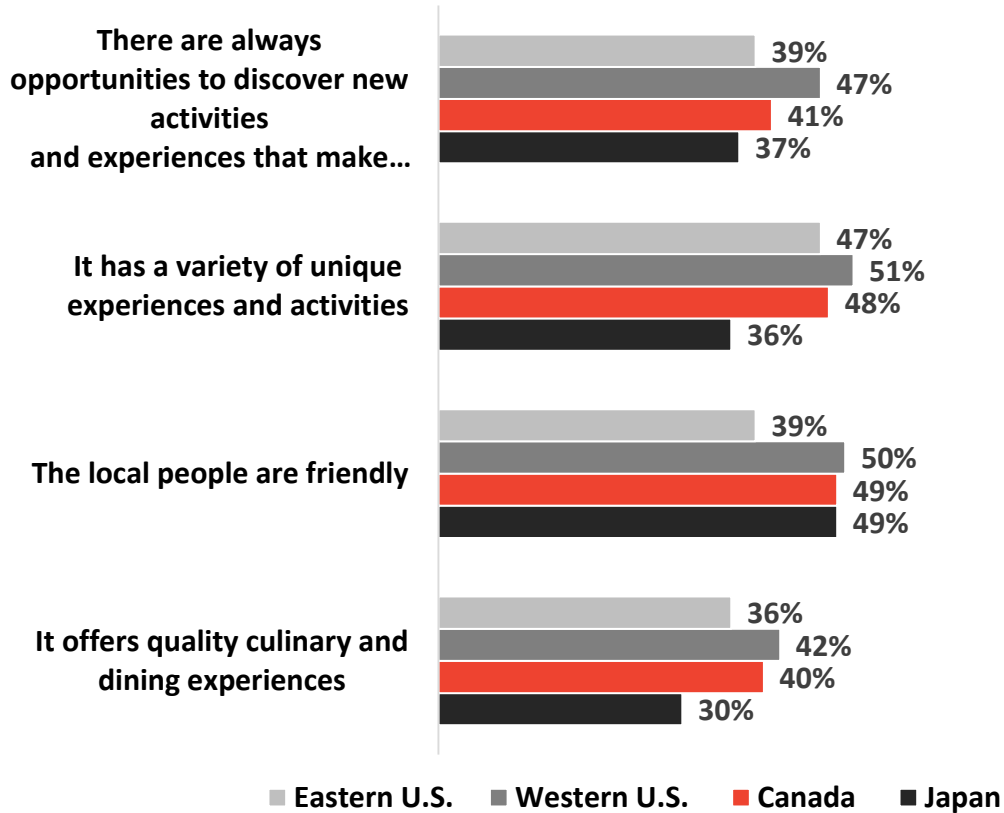
## HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



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

\* Added in NOV 2015

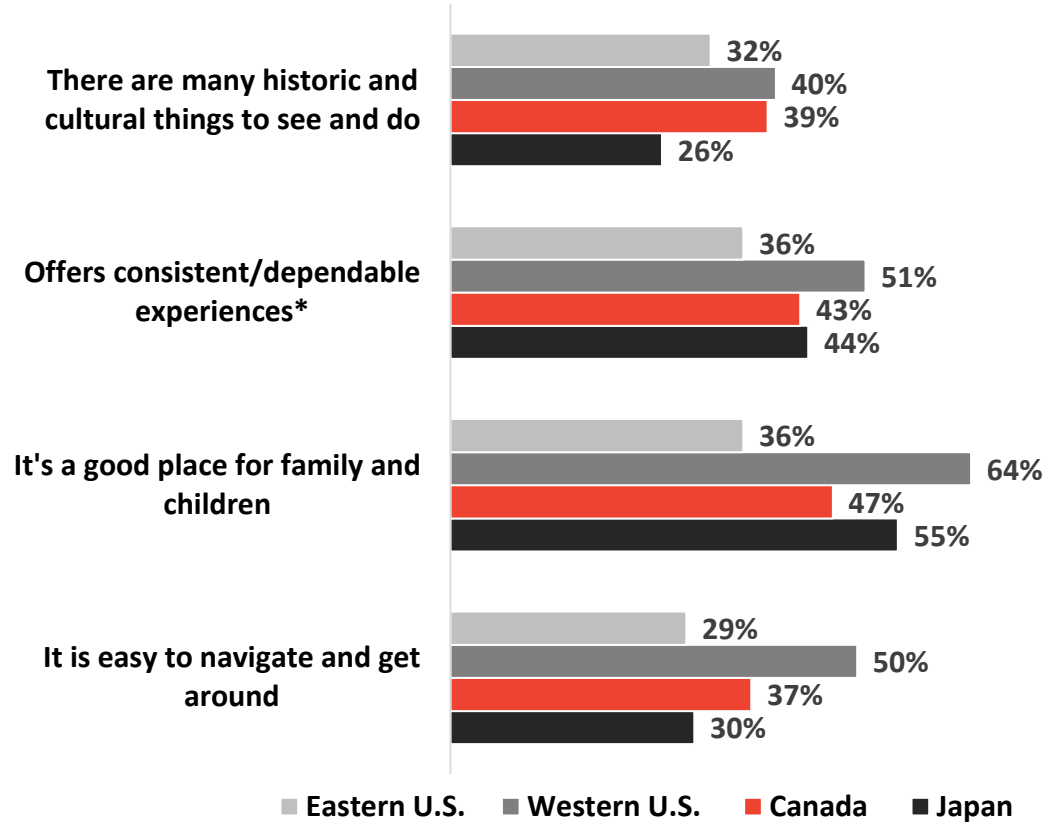
HAWAI'I PERFORMANCE ON ATTRIBUTES IMPORTANT IN CHOOSING A DESTINATION (CONT.) (% TOP 2 BOX)



Q6a: For each attribute, please select the destination(s) to which it applies.  
 \* Added in NOV 2015



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

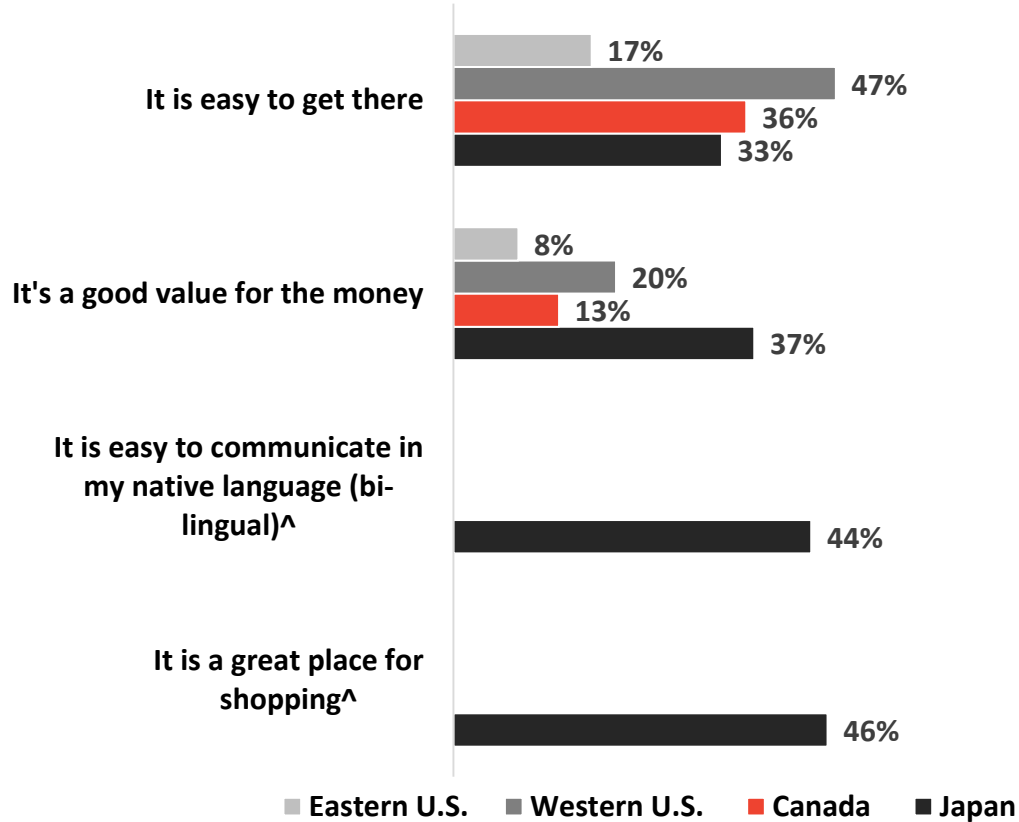


Q6a: For each attribute, please select the destination(s) to which it applies.

^ Asked of Japan Only

\* Added in NOV 2015

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



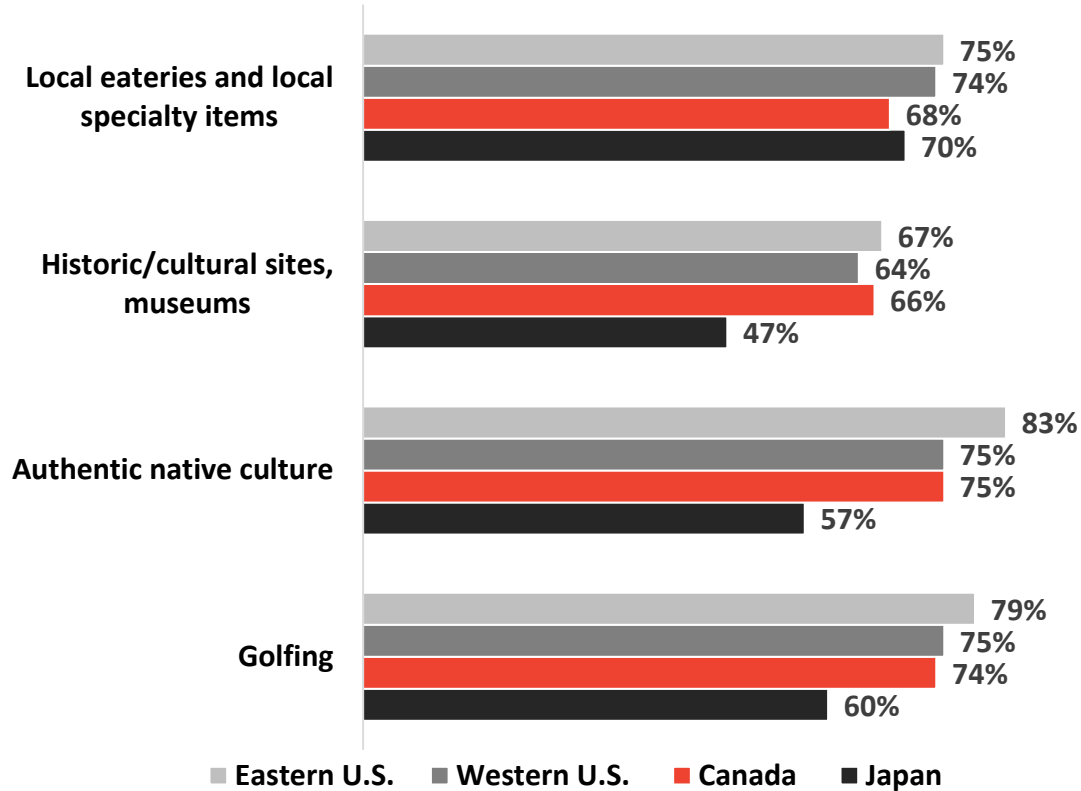
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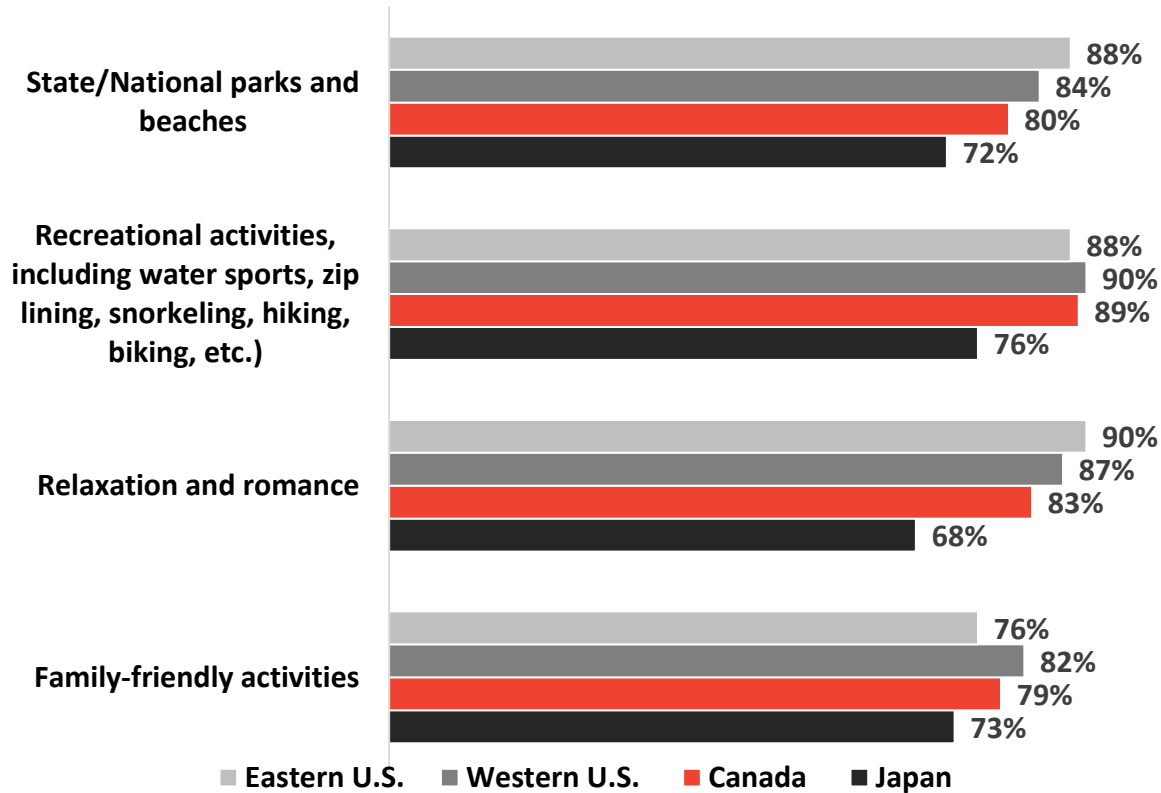
**What Do Visitors Think of Hawai'i?**

## IMPRESSION OF HAWAI'I (% TOP 2 BOX)



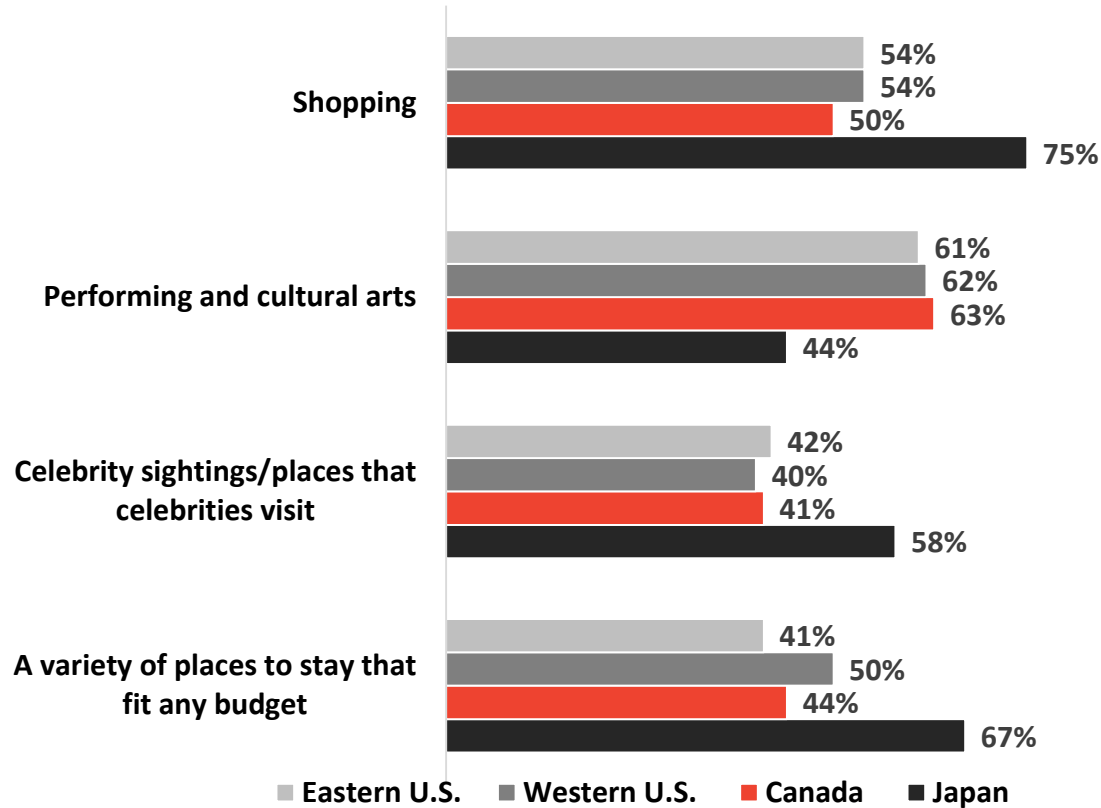
Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

## IMPRESSION OF HAWAI'I (% TOP 2 BOX)



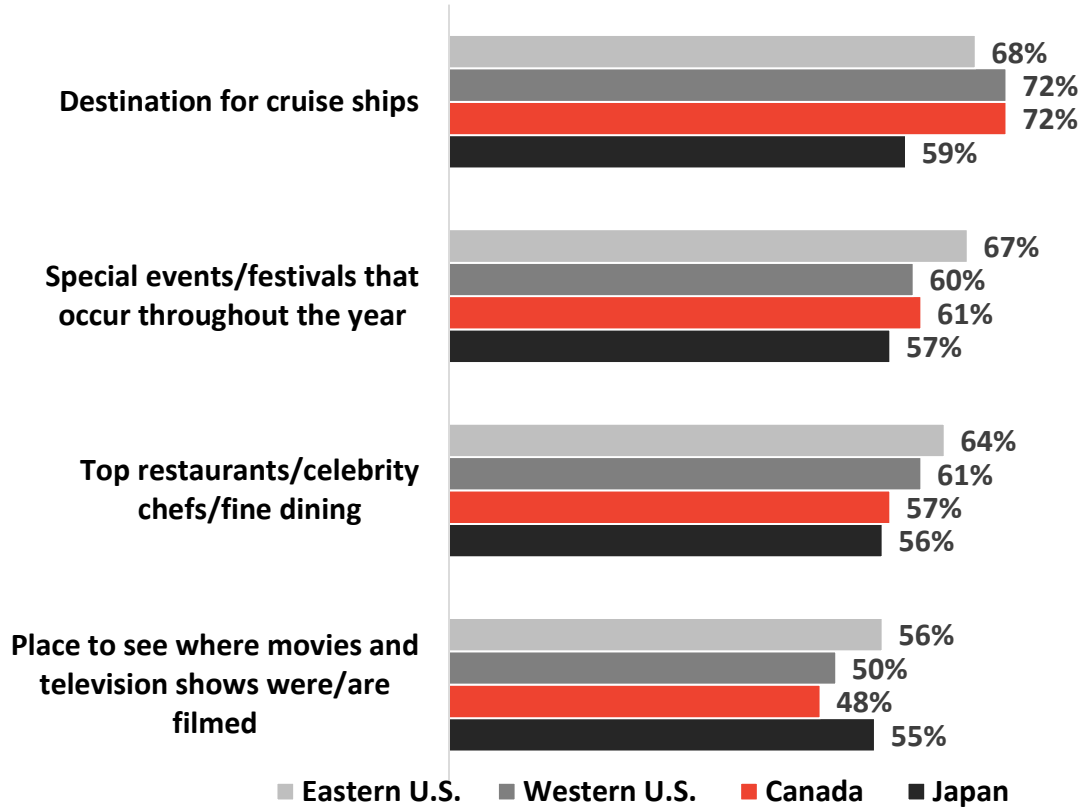
Q7a: Please indicate your impression of how well Hawai'i delivers on each of the attributes below using a scale of 1 (Does Not Deliver at All) to 5 (Delivers Extremely Well).

## 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).

## 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).

Who are the Competitors?



## DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

### Eastern U.S.

- |                              |                                |
|------------------------------|--------------------------------|
| <b>1. Florida (37%)</b>      | <b>11. Puerto Rico (11%)</b>   |
| <b>2. California (35%)</b>   | <b>12. Germany (10%)</b>       |
| <b>3. Caribbean (34%)</b>    | <b>13. Cuba (9%)</b>           |
| <b>4. Las Vegas (23%)</b>    | <b>14. Switzerland (7%)</b>    |
| <b>5. Mexico (19%)</b>       | <b>15. Other (20%)</b>         |
| <b>6. Hawai'i (17%)</b>      | <b>No Trip Considered (4%)</b> |
| <b>7. Other Europe (16%)</b> |                                |
| <b>8. U.K. (15%)</b>         |                                |
| <b>9. Italy (14%)</b>        |                                |
| <b>10. Costa Rica (11%)</b>  |                                |

## DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

### Western U.S.

- |                              |                                |
|------------------------------|--------------------------------|
| <b>1. Hawai'i (46%)</b>      | <b>11. Germany (15%)</b>       |
| <b>2. Alaska (31%)</b>       | <b>12. Costa Rica (13%)</b>    |
| <b>3. Las Vegas (30%)</b>    | <b>13. Switzerland (11%)</b>   |
| <b>4. Caribbean (30%)</b>    | <b>14. Other (20%)</b>         |
| <b>5. Mexico (23%)</b>       |                                |
| <b>6. U.K. (23%)</b>         | <b>No Trip Considered (5%)</b> |
| <b>7. Other Europe (23%)</b> |                                |
| <b>8. Italy (21%)</b>        |                                |
| <b>9. France (19%)</b>       |                                |
| <b>10. Australia (16%)</b>   |                                |

## DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

### Canada

1. California (37%)
  2. Mexico (34%)
  3. Europe (33%)
  4. Hawai'i (32%)
  5. Las Vegas (26%)
  6. Caribbean (27\6%)
  7. Florida (20%)
  8. Australia (14%)
  9. Arizona (13%)
  10. Other (27%)
- No Trip Considered (3%)**

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.

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## DESTINATION CONSIDERATION FOR NEXT LEISURE VACATION

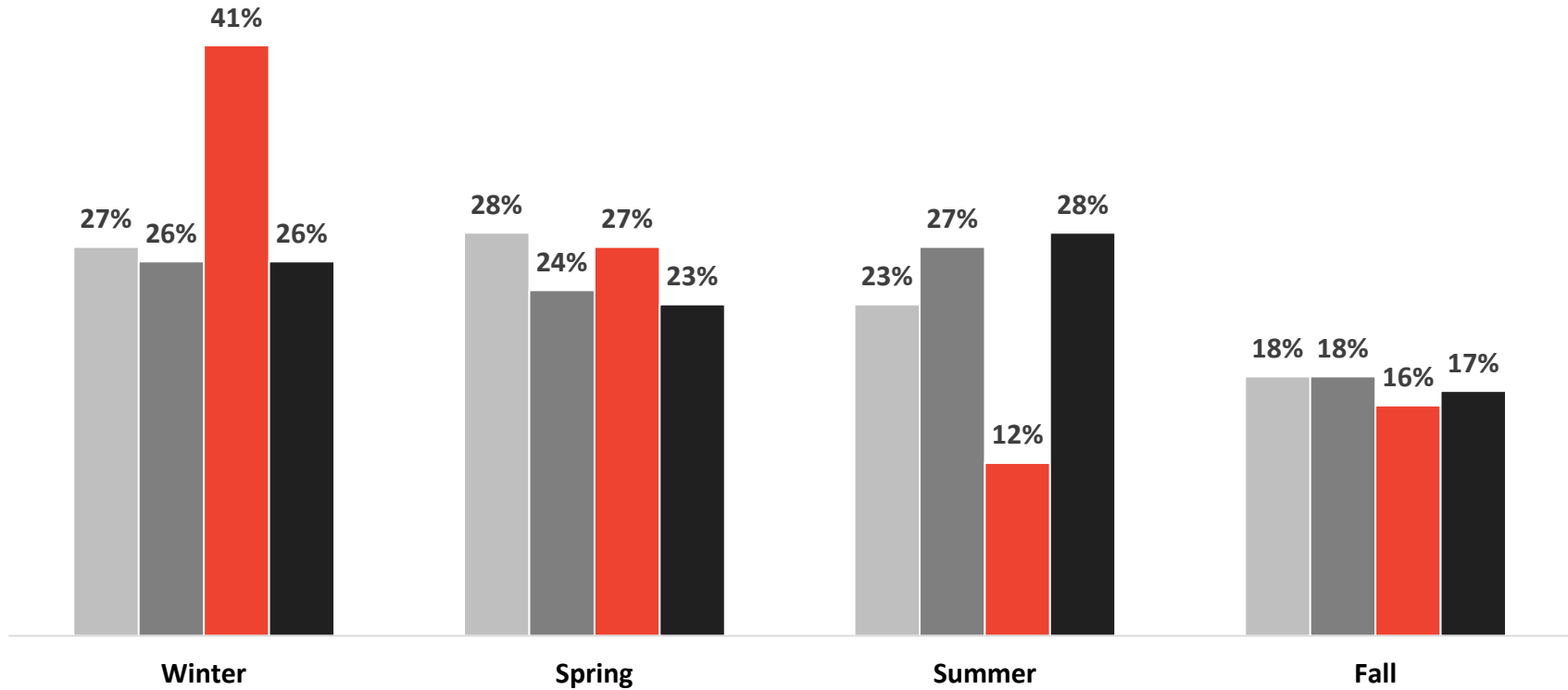
### Japan

- 1. Hawai'i (31%)**
  - 2. Europe (28%)**
  - 3. Australia (27%)**
  - 4. Taiwan (26%)**
  - 5. Singapore (19%)**
  - 6. Guam/Saipan (17%)**
  - 7. Thailand (17%)**
  - 8. Hong Kong (11%)**
  - 9. China (11%)**
  - 10. Korea (10%)**
  - 11. Other (11%)**
- No Trip Considered (7%)**

# Hawai'i Visitation Frequency

## SEASON LAST VISITED HAWAI'I

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

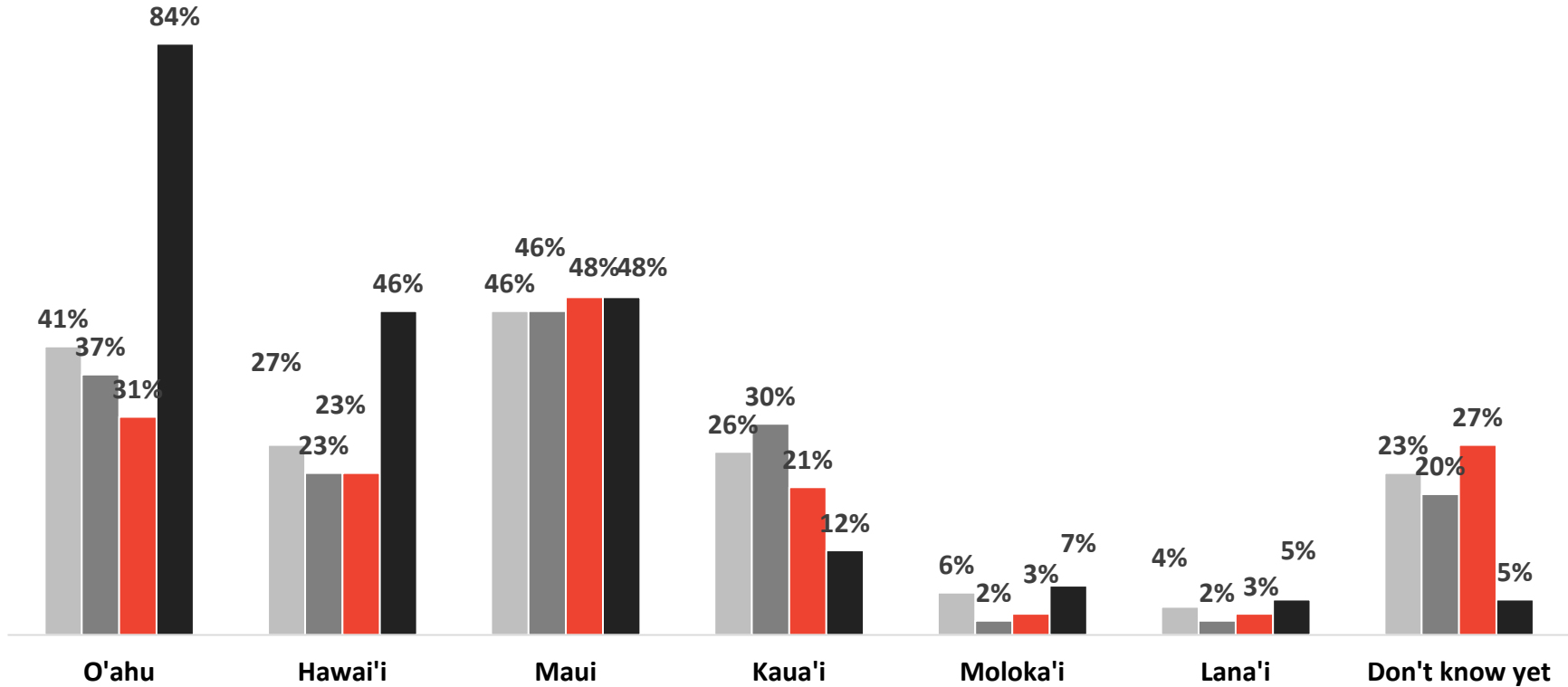


Q13b: What was the MONTH of your LAST VISIT to Hawai'i?

# Hawai'i Planned Visitation

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

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



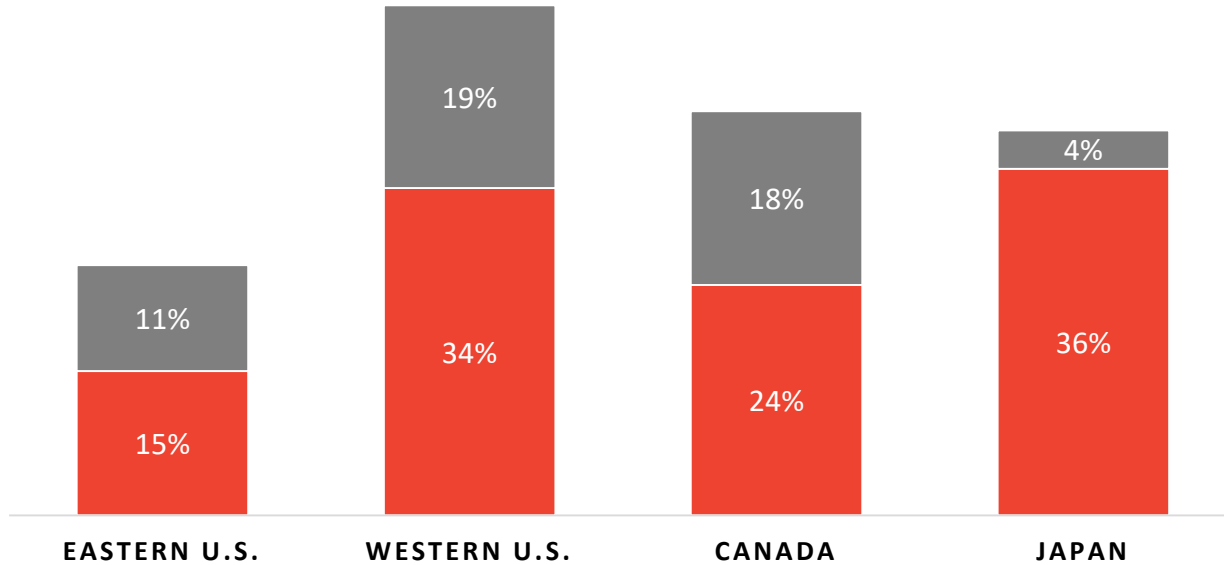
Q9c: You indicated that you are planning to visit Hawai'i in the next 24 months. Which islands do you plan to visit?





## HAWAI'I VISITATION FREQUENCY

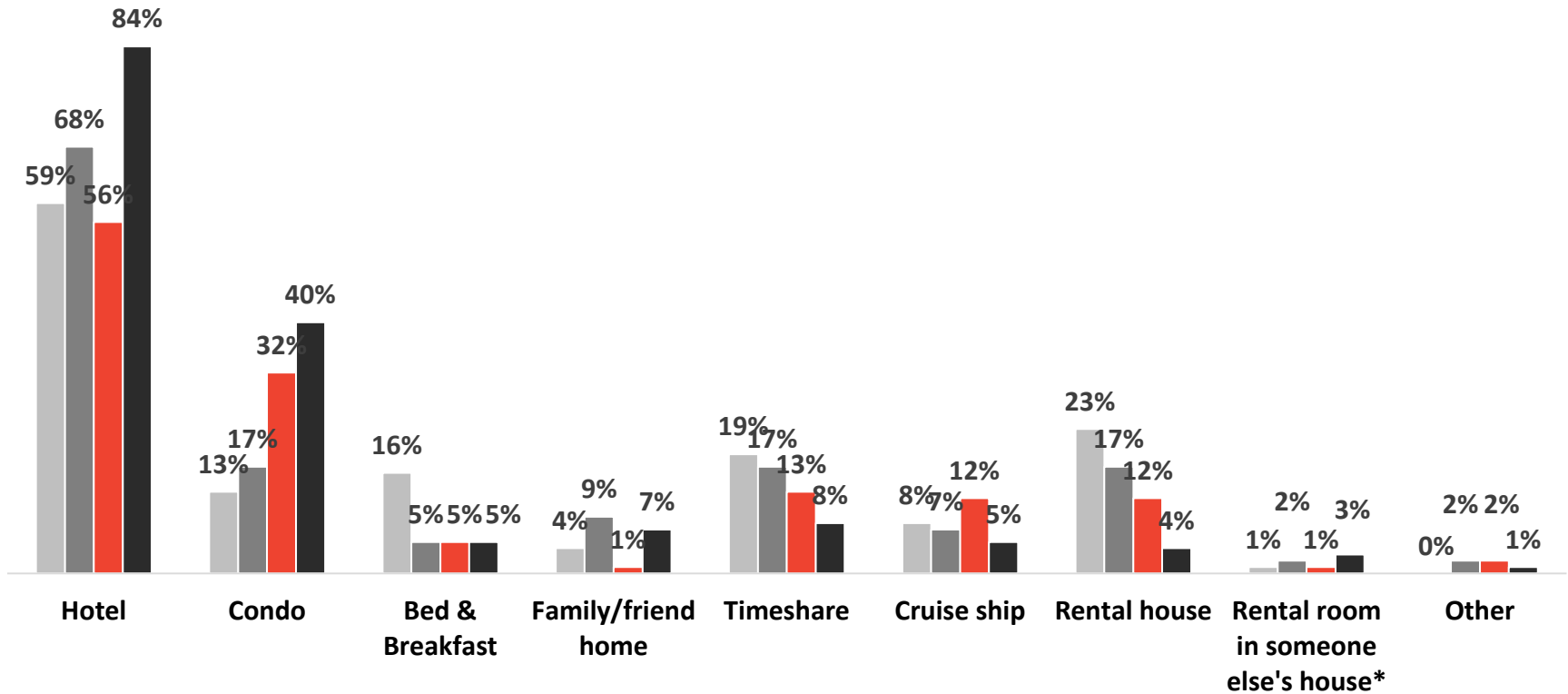
■ Plan to Visit Next 12 Months ■ Plan to Visit Next 13-24 Months



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 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?

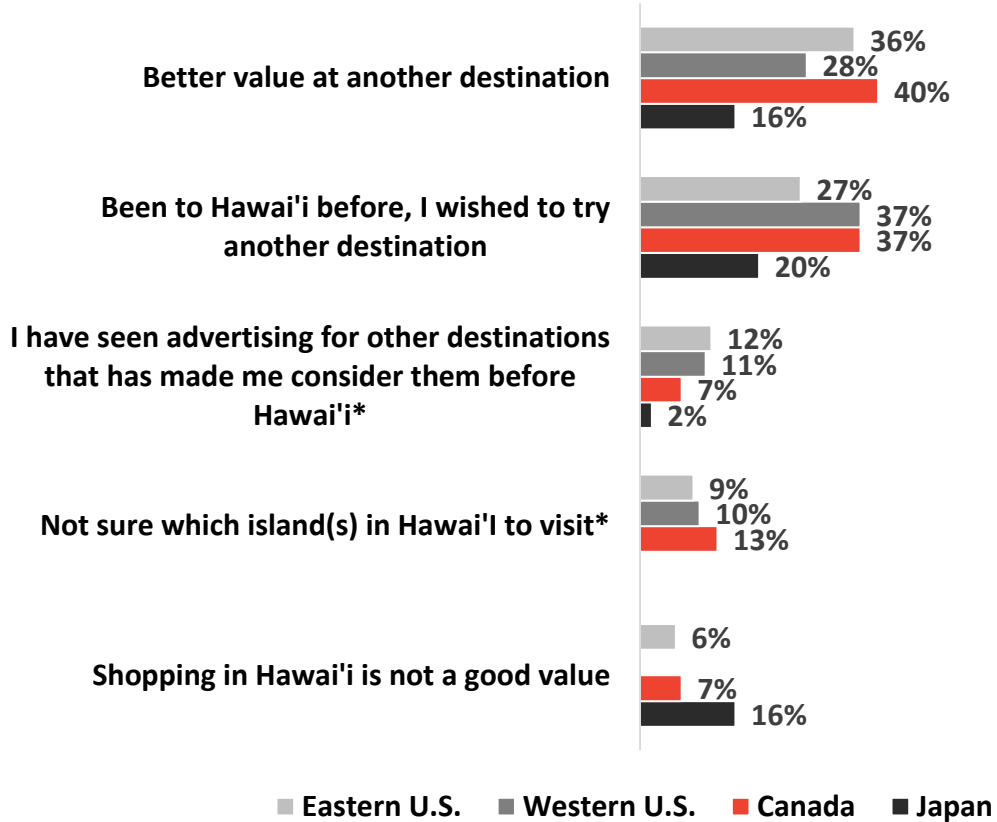
\*Asked starting in MAR 2015

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# Hawai'i Visitation

## Why they Don't Return and Why they Do

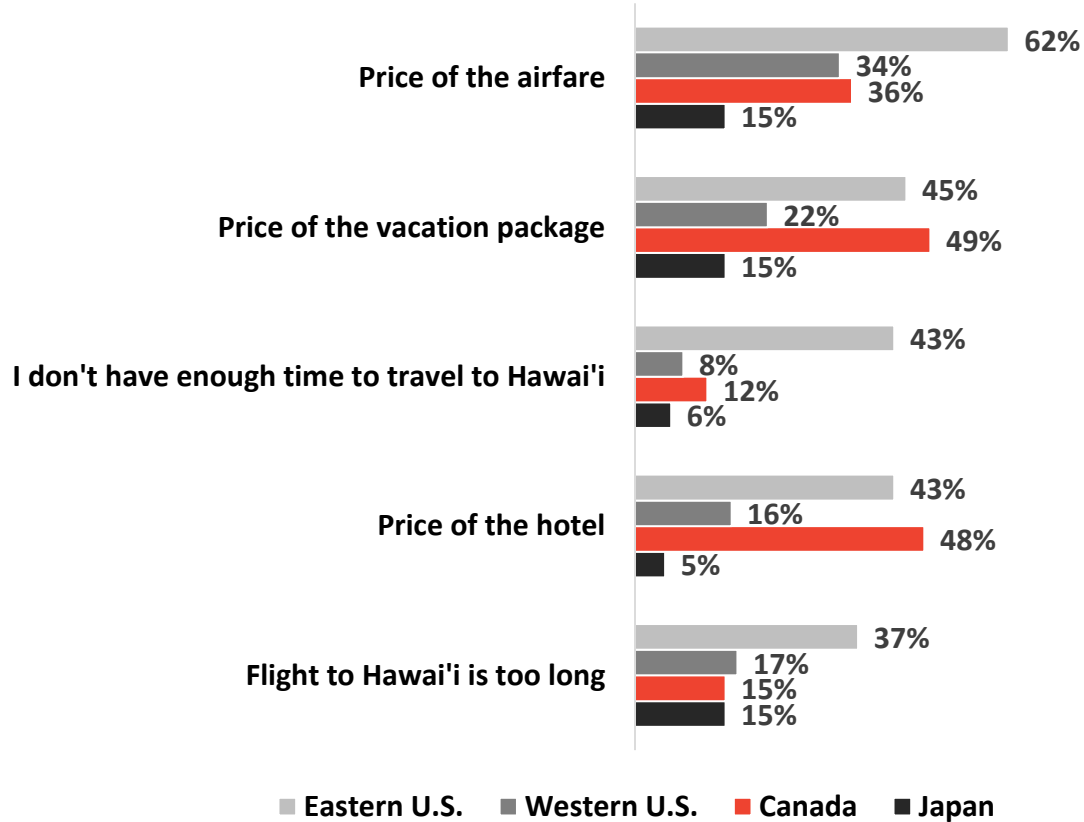
## REASONS FOR NOT VISITING HAWAI'I (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)



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?

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

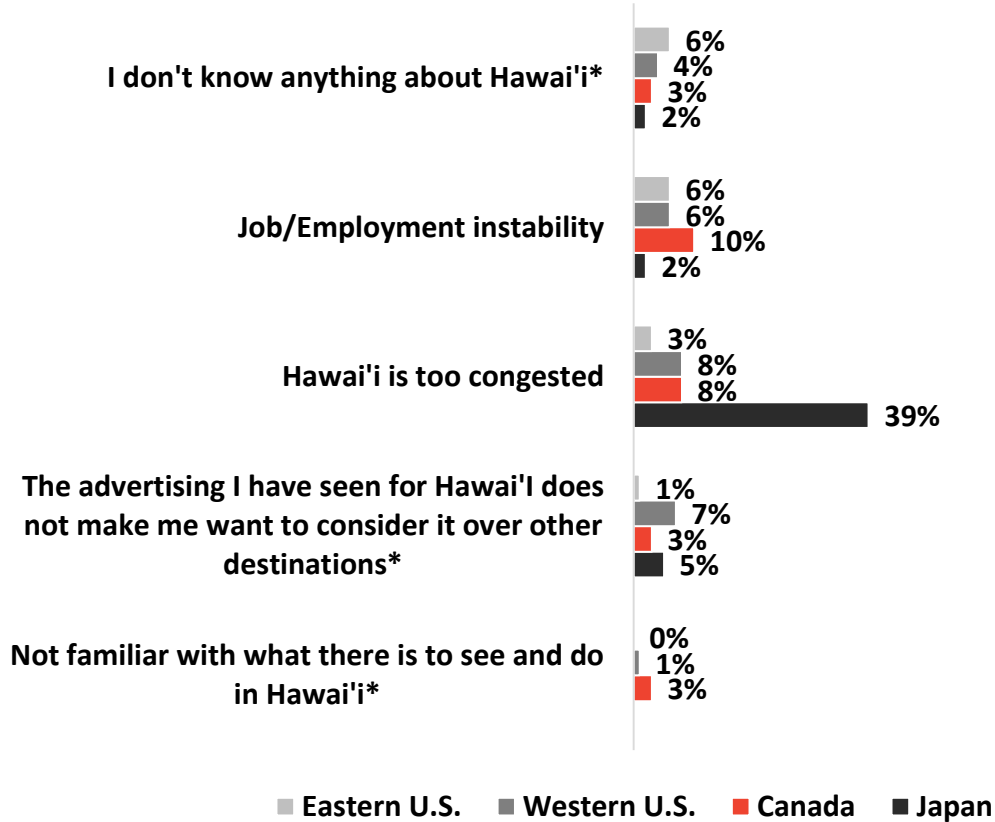
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## REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

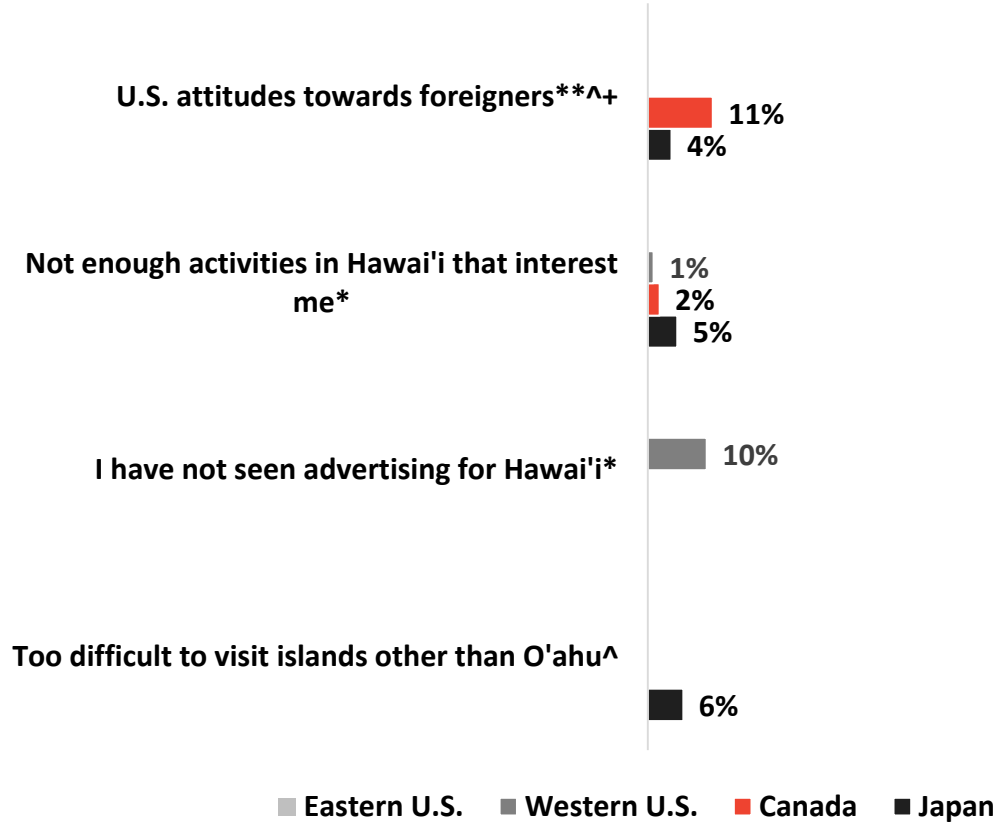


Q10: Earlier you indicated that you had considered Hawai'i for a leisure vacation, but are not intending to visit in the next 24 months. Which of the following reasons explains why you considered, but are not intending to visit Hawai'i in the next 24 months?

\*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)



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?

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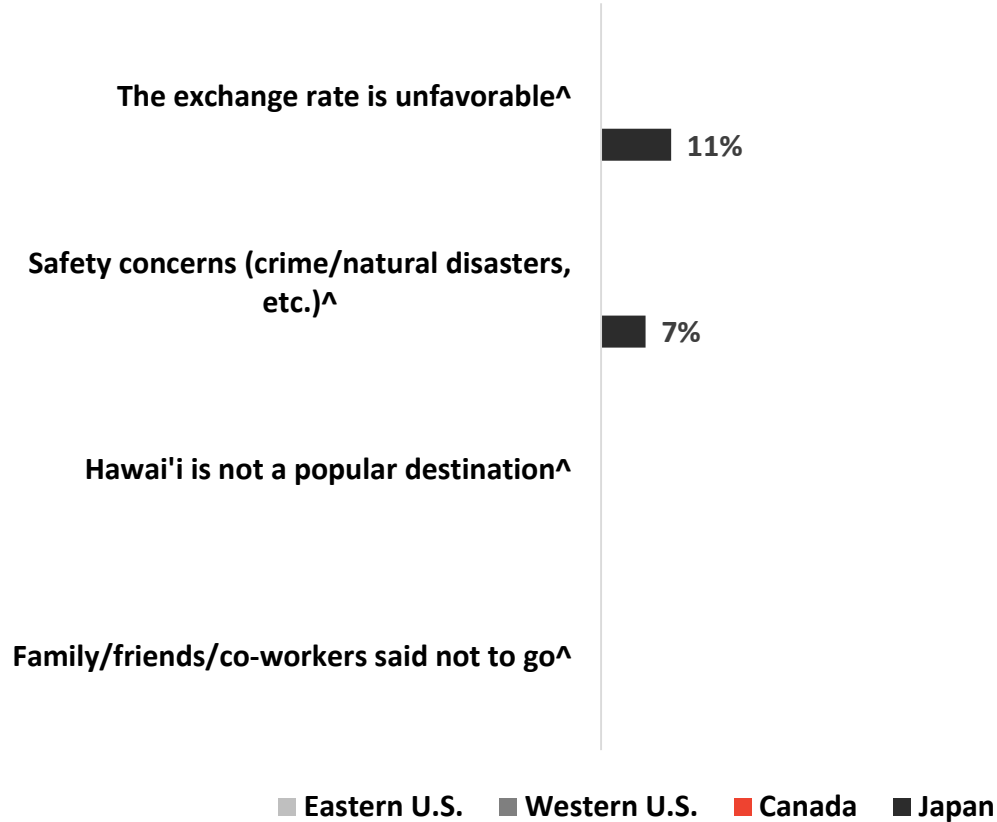
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## REASONS FOR NOT VISITING HAWAI'I (CONT.) (AMONG THOSE CONSIDERING, BUT NOT PLANNING TO VISIT)

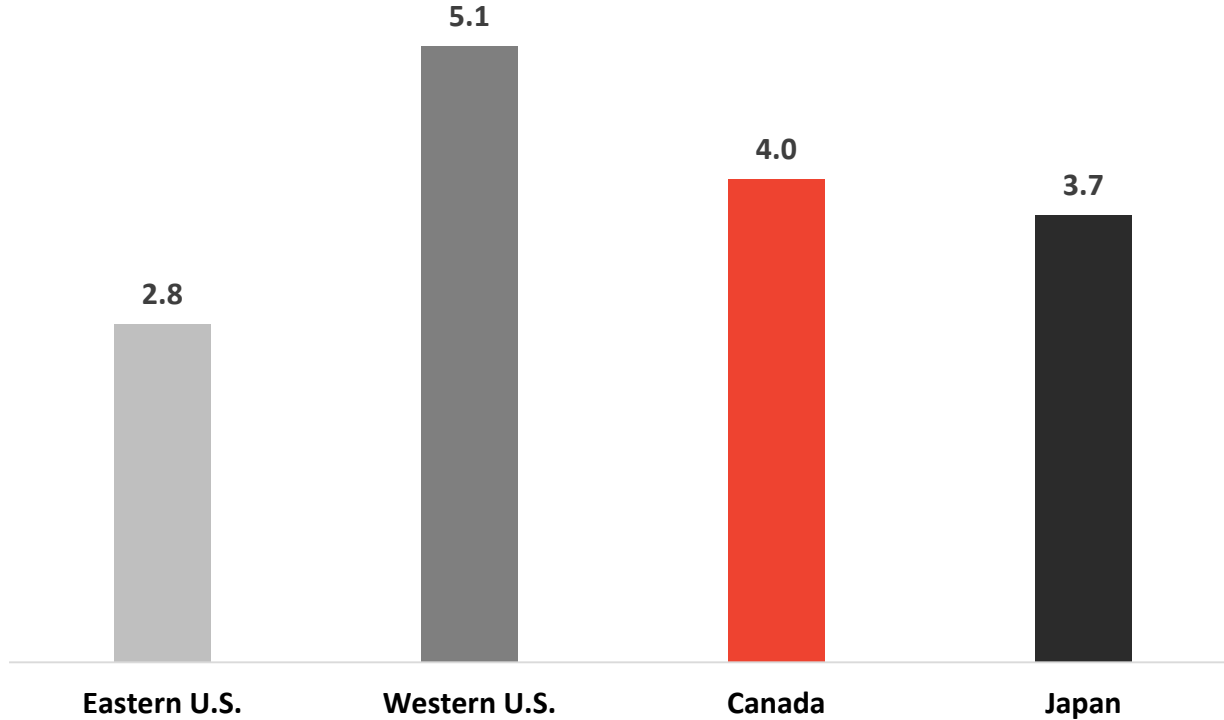


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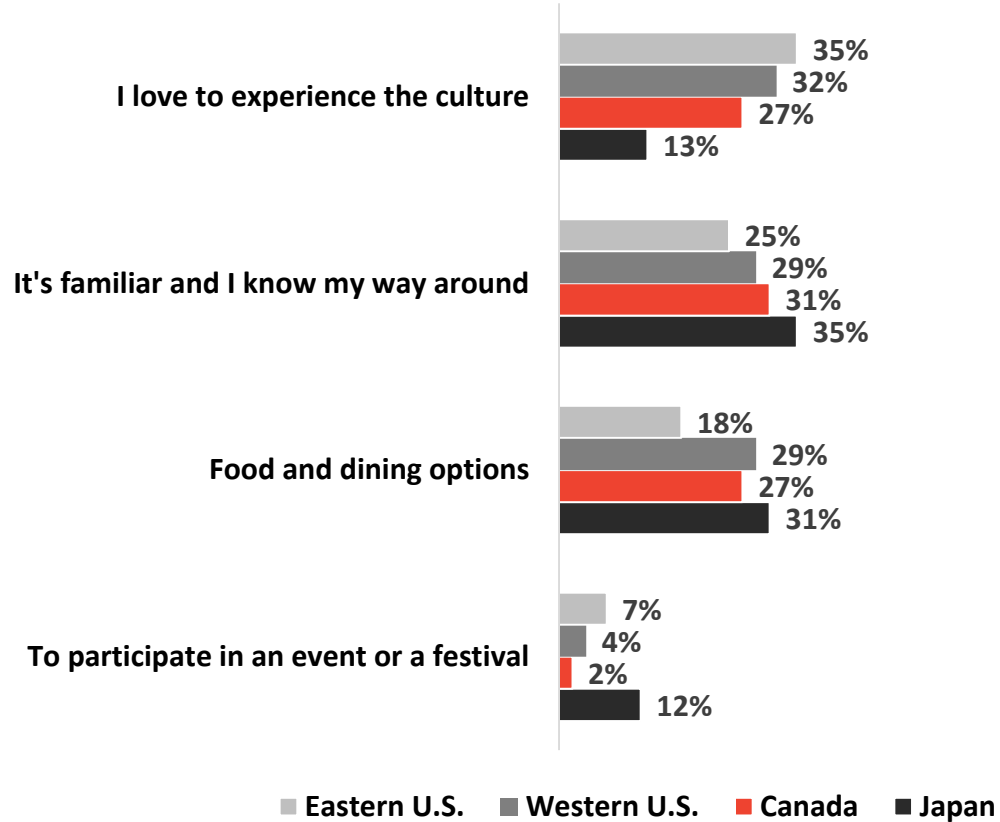
Note: Sample sizes for this question are very small; use data with proper caution

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



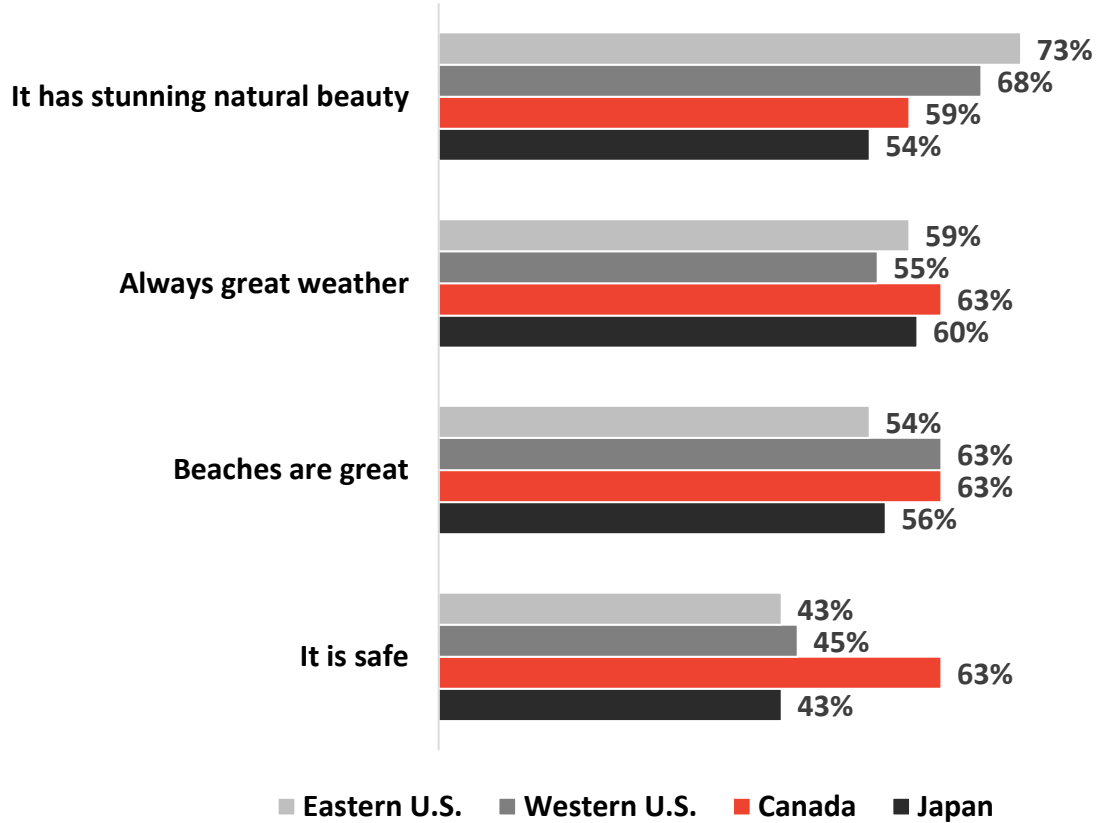
Q11: How many times have you visited Hawai'i in your lifetime?

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



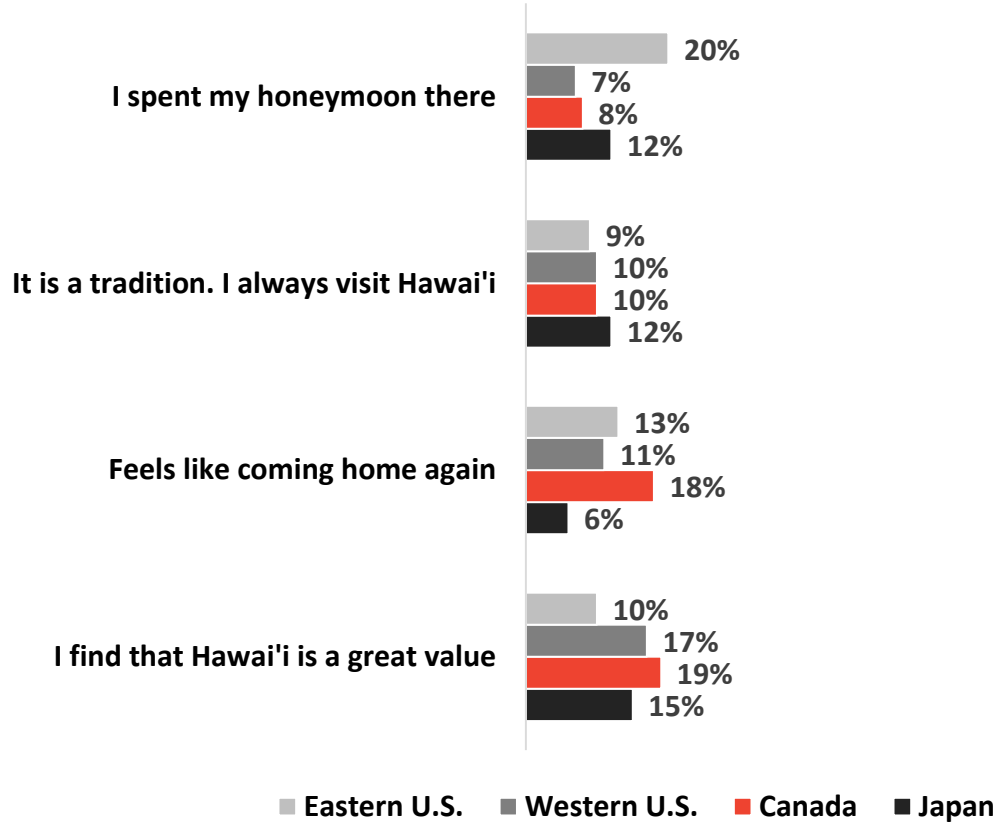
Q12: Which of the following reasons best explains why you keep returning to Hawai'i?

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



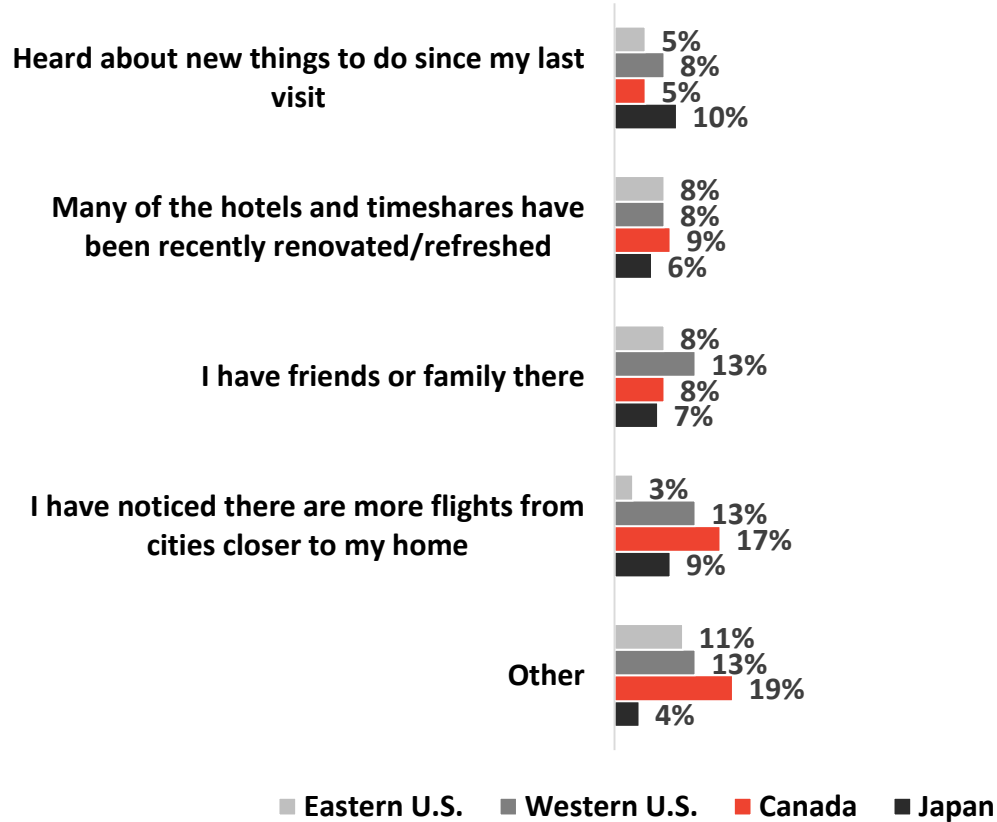
Q12: Which of the following reasons best explains why you keep returning to Hawai'i?

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



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

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

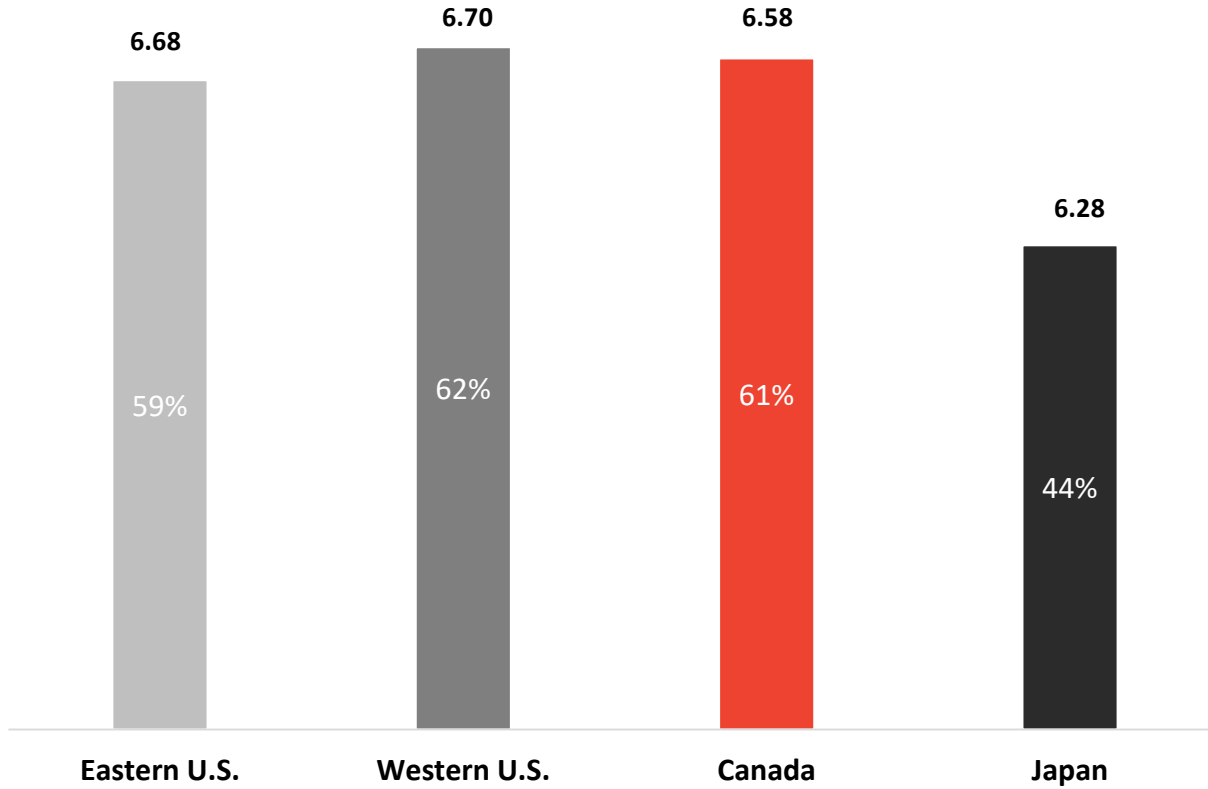


Q12: Which of the following reasons best explains why you keep returning to Hawai'i?

# Hawai'i Visitation

## What they Think and Will they Return

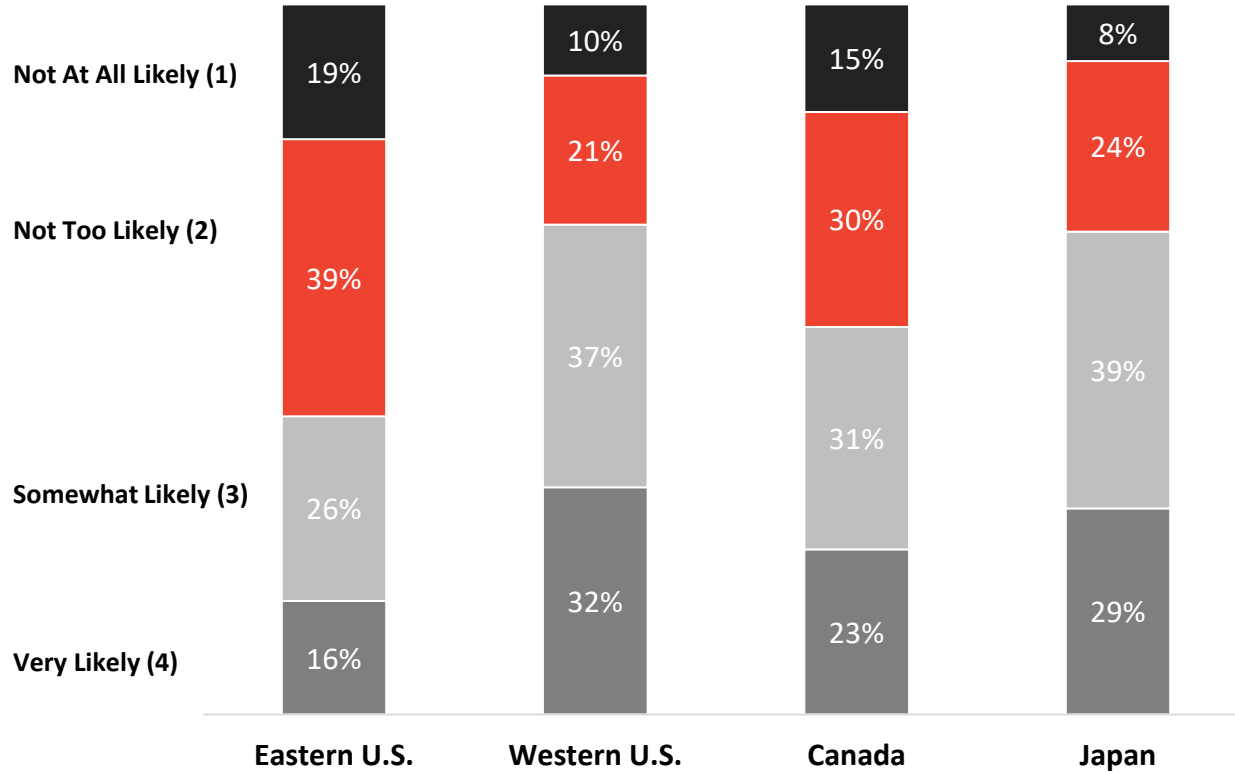
## HAWAI'I EXCELLENT RATING (% TOP 2 BOX; MEAN)



Q17: Overall, how would you rate your most recent trip to Hawai'i? 8 point scale



## 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?\*