



First Quarter 2017

Visitor Satisfaction  
Monitoring Report

HAWAII TOURISM

AUTHORITY

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## **INTRODUCTION**

This quarterly monitoring report presents selected preliminary statistics from the first quarter of the 2017 Visitor Satisfaction and Activity (VSAT) Survey. The survey measures the opinions of visitors from eight visitor groups: U.S. West, U.S. East, Japan, Canada, Europe, Oceania, China and Korea regarding their satisfaction with Hawai'i as a visitor destination.

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

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

### **Condition of Visitor Industry**

Total visitor arrivals by air in the first quarter (January to March) of 2017 increased 2.3 percent, compared to the first quarter of 2016, to 2,223,939 visitors.

There were more visitors from U.S. West (+1.7% to 848,432 visitors), U.S. East (+5.2% to 517,888), Japan (+7.3% to 383,702) and Canada (+3.5% to 195,309) but fewer visitors from Oceania (-0.9% to 72,921), Korea (-1.5% to 61,827), China (-9.4% to 37,114) and Europe (-5.7% to 24,710). The average length of stay for all visitors to the state was 9.51 days, similar to first quarter 2016 (9.48 days).

## VISITOR SATISFACTION RATINGS

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

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

MMA	2014				2015				2016				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
U.S. West	82	82	82	81	82	84	83	87	89	89	88	88	87
U.S. East	82	85	84	84	88	89	85	90	91	90	90	90	91
Japan	63	69	74	69	69	70	72	67	75	77	78	78	80
Canada	80	84	86	86	83	84	82	85	88	88	89	88	88
Europe	77	82	91	85	88	88	89	87	91	86	91	89	88
Oceania	77	79	79	73	83	77	74	75	80	81	81	82	81
China									76	64	76	77	82
Korea									78	82	73	78	79

P=Preliminary

- In the first quarter of 2017, nearly 90 percent of U.S. West, U.S. East, Canadian and European respondents, and close to 80 percent of Japanese and Oceania, respondents rated their most recent trip to Hawai'i as excellent. Ratings from these visitor groups have shown overall improvement over the last three years.
- Excellent ratings by Japanese respondents (+5 points) increased compared to first quarter 2016.
- Eight out of ten Chinese and Korean respondents in the first quarter of 2017 gave excellent ratings to their trip to Hawai'i, similar to first quarter 2016.

### Exceeded Expectations

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

In first quarter 2017, very few respondents from China (5%), Korea (5%), U.S. West (3%), Oceania (3%), Japan (2%), Canada (2%), Europe (2%) and U.S. East (1%) said that Hawai'i "did not meet" their expectations.

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

MMA	2014				2015				2016				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
U.S. West	33	34	38	34	35	38	37	40	42	44	42	42	40
U.S. East	45	53	51	46	43	51	47	53	50	53	56	53	50
Japan	29	31	35	36	33	34	35	35	37	39	37	39	45
Canada	35	46	54	39	37	45	43	40	44	50	51	46	38
Europe	48	40	55	52	56	53	51	48	57	54	52	53	53
Oceania	38	33	37	40	41	40	31	35	39	37	39	39	41
China									28	21	9	16	20
Korea									55	59	53	55	55

P=Preliminary

- Ratings by Japanese (+8 points to 45%), respondents improved compared to first quarter 2016, but ratings by Canadian (-6 points to 38%) declined. Ratings by U.S. West and U.S. East respondents were consistent with last year.
- Over half of Korean respondents in first quarter 2017 said Hawai'i exceeded their expectations, unchanged from a year ago.
- Chinese visitors were a bit more critical about Hawai'i. Only 20 percent of the respondents felt that Hawai'i “exceeded” their expectations, while 75 percent said the trip “met” their expectations. Ratings for “exceeded expectations” in First quarter 2017 were down 8 points from the same period last year.

### Very Likely to Recommend Hawai'i

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

In first quarter 2017, only a small percentage of Oceania (3%), European (3%), Korean (3%), Japanese (2%), Canadian (2%), U.S. West (1%), U.S. East (1%), and Chinese (1%) visitors said that they would “not too likely” or “not at all likely” recommend Hawai'i to their friends and relatives.

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

MMA	2014				2015				2016				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
U.S. West	90	87	88	88	89	91	90	90	90	91	88	90	90
U.S. East	87	87	88	87	90	90	86	88	88	87	88	88	90
Japan	74	73	78	74	76	74	79	74	74	80	81	78	78
Canada	88	89	93	90	90	89	87	88	91	91	89	90	88
Europe	78	77	87	84	85	82	83	83	86	81	87	84	82
Oceania	81	82	85	79	82	82	78	78	76	81	80	81	82
China									81	66	72	66	76
Korea									84	84	83	83	83

P=Preliminary

- Nine out of ten U.S. West, U.S. East and Canadian respondents in first quarter 2017 would very likely recommend Hawai'i to friends and relatives. These ratings have been relatively consistent over the last three years.
- In the first quarter of 2017, 82 percent of respondents from Oceania and Europe would very likely recommend Hawai'i. Ratings by Oceania visitors improved 6 points from the same quarter last year.
- Japanese visitors' ratings have been hovering near 80 percent. Ratings for first quarter 2017 improved 4 points compared to the same quarter last year.
- In first quarter 2017, 83 percent of Korean respondents and 76 percent of Chinese respondents would very likely recommend Hawai'i to their friends and relatives, about the same as last year.

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

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

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

MMA	2014				2015				2016				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
U.S. West	78	72	74	79	79	77	75	81	82	82	76	79	78
U.S. East	55	48	52	54	62	54	53	61	61	55	60	59	61
Japan	47	52	57	47	52	52	55	51	48	54	60	54	54
Canada	64	61	55	66	66	60	55	64	68	67	63	67	67
Europe	34	34	37	40	51	40	38	49	54	39	42	45	47
Oceania	51	47	53	51	62	54	48	53	59	58	60	60	59
China									60	54	52	52	60
Korea									79	78	82	80	75

P=Preliminary

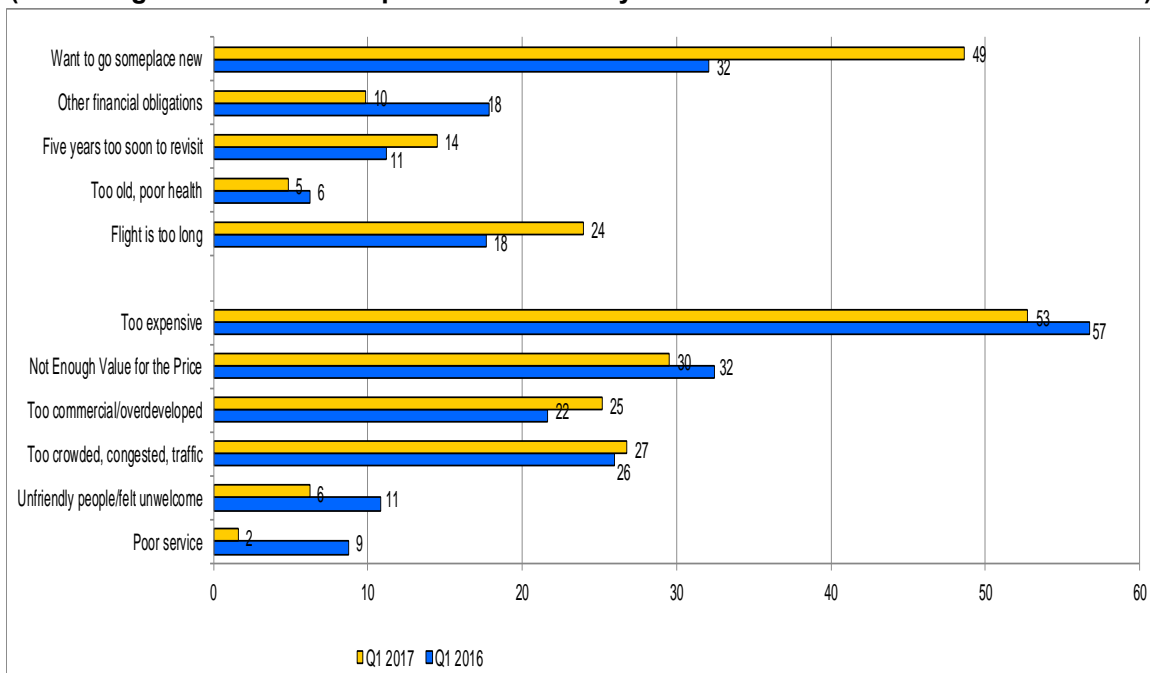
- U.S. West respondents continued to show the highest overall willingness to revisit Hawai'i (78%). Ratings for first quarter 2017 were down slightly (-4 points) compared to a year ago.
- Ratings by Japanese respondents improved 6 points to 54 percent indicating that they will very likely return.
- With the long distance and no direct flights to Hawai'i, European visitors continued to show the lowest percentage of likelihood to return (47%). Ratings by these visitors dropped 7 points compared to first quarter 2016.
- Three out of four Korean respondents and 60 percent of Chinese respondents in first quarter 2017 said that they would very likely revisit Hawai'i in the next five years. These ratings were similar to a year ago.

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

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

In Figures 1 to 8, visitors' reasons for not returning were separated into two groups: "barriers to returning" and "performance issues." Barriers appear at the top of each figure and performance issues are at the bottom. "Not enough value for the price" is similar to "too expensive," but is a complaint about the quality of the product rather than its price tag. Note that the statistic reported for each reason for not revisiting Hawai'i is a percentage of those who were not likely to revisit Hawai'i.

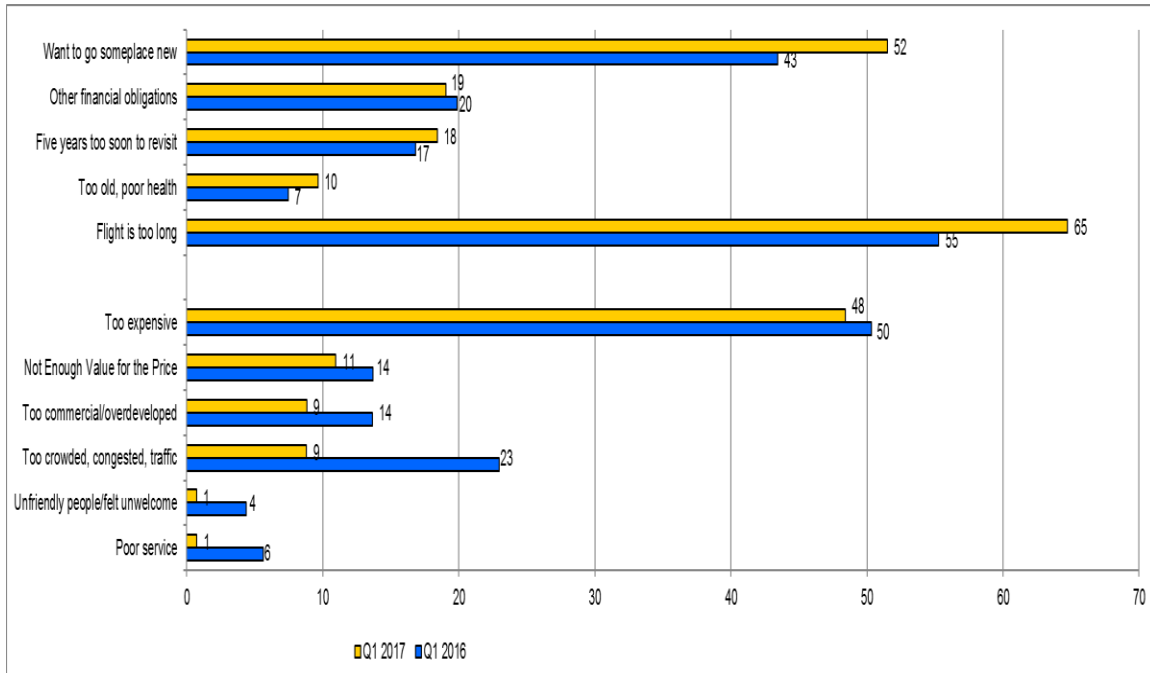
**Figure 1: U.S. West Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of U.S. West Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among U.S. West respondents in first quarter 2017, 49 percent said they would not likely return because they want to go someplace new, up significantly (+17 points) from last year.

Over half of U.S. West respondents (-4 points to 53%) mentioned the high cost as a reason for not coming back to the islands. Some visitors said that there is not enough value for the price (-2 points to 30%), Hawai'i is too crowded/congested (+1 points to 27%), and Hawai'i too commercial/overdeveloped (+3 points to 25%).

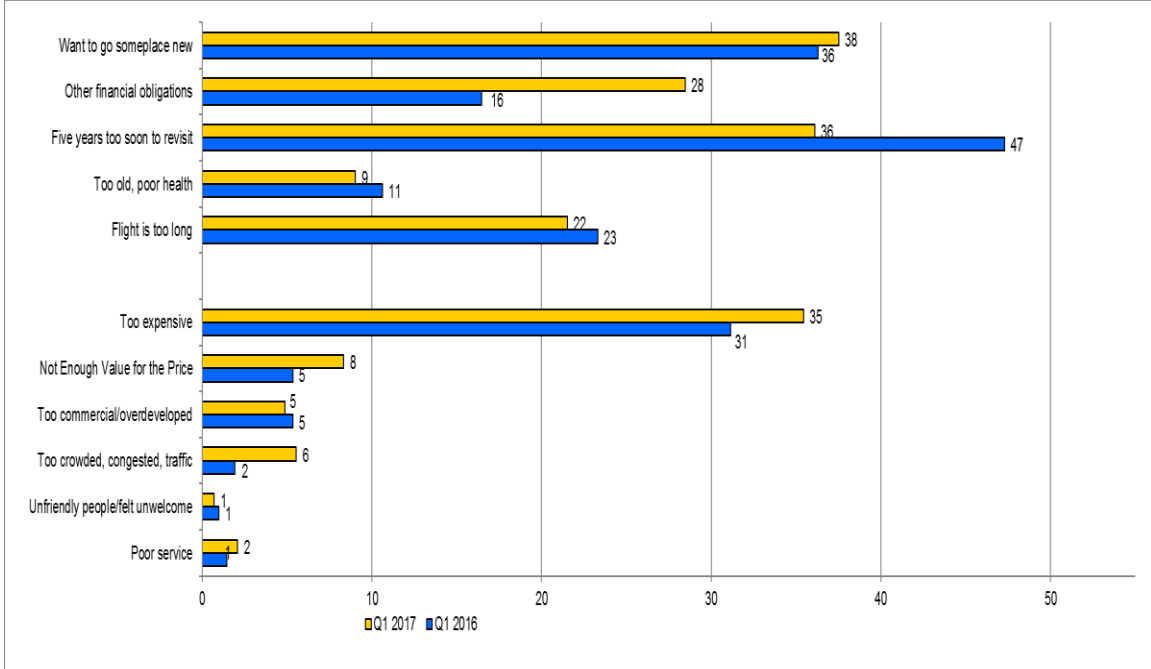
**Figure 2: U.S. East Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



A higher percentage of U.S. East respondents cited the long flight (+10 points 65%) and the desire to go someplace new (+9 points to 52%) as barriers to revisiting Hawai'i, compared to first quarter 2016.

About half of the respondents cited the high cost (-2 points 48%) as the main performance issue and a reason for not returning. Fewer respondents said Hawai'i is too crowded/congested (-14 points to 9%) compared to last year.

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

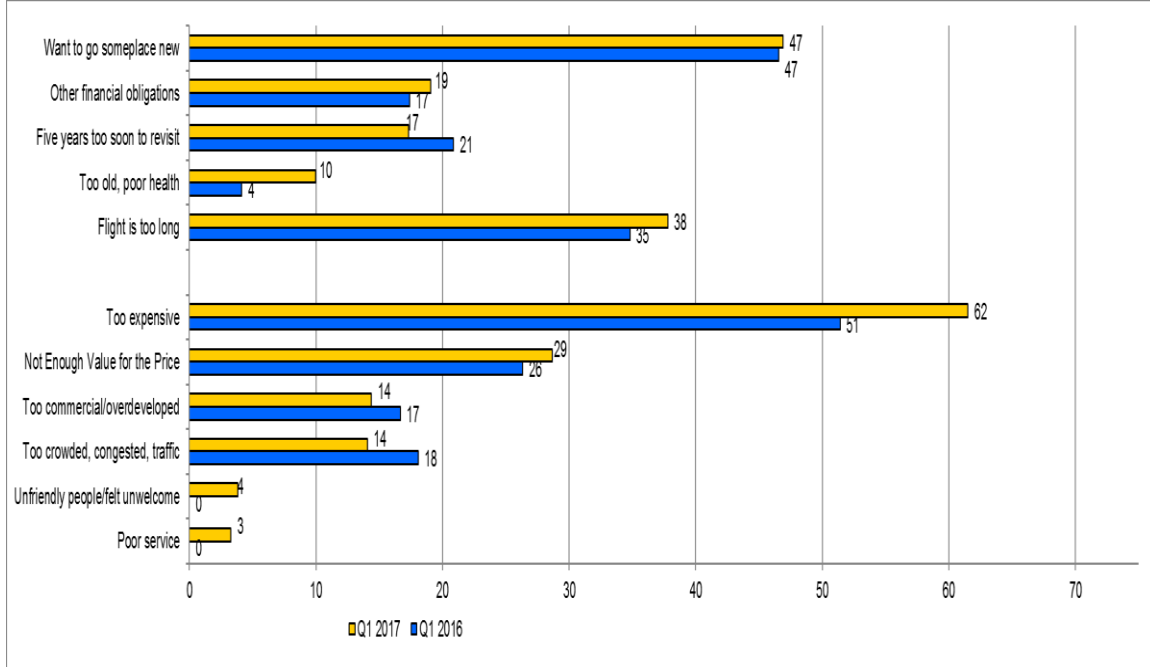


Japanese respondents in first quarter 2017 continued to cite more barriers than performance-related issues. Close to 40 percent of the respondents indicated that they want to go to a new destination (38%). A third of the respondents (36%) said five years is too soon to revisit, but this was down from 47 percent in first quarter 2016. More respondents said that they will not return because of other financial obligations (+12 points to 28%).

More Japanese visitors in first quarter 2017 said that Hawai'i is too expensive (+4 points to 35%) compared to those who came last year.



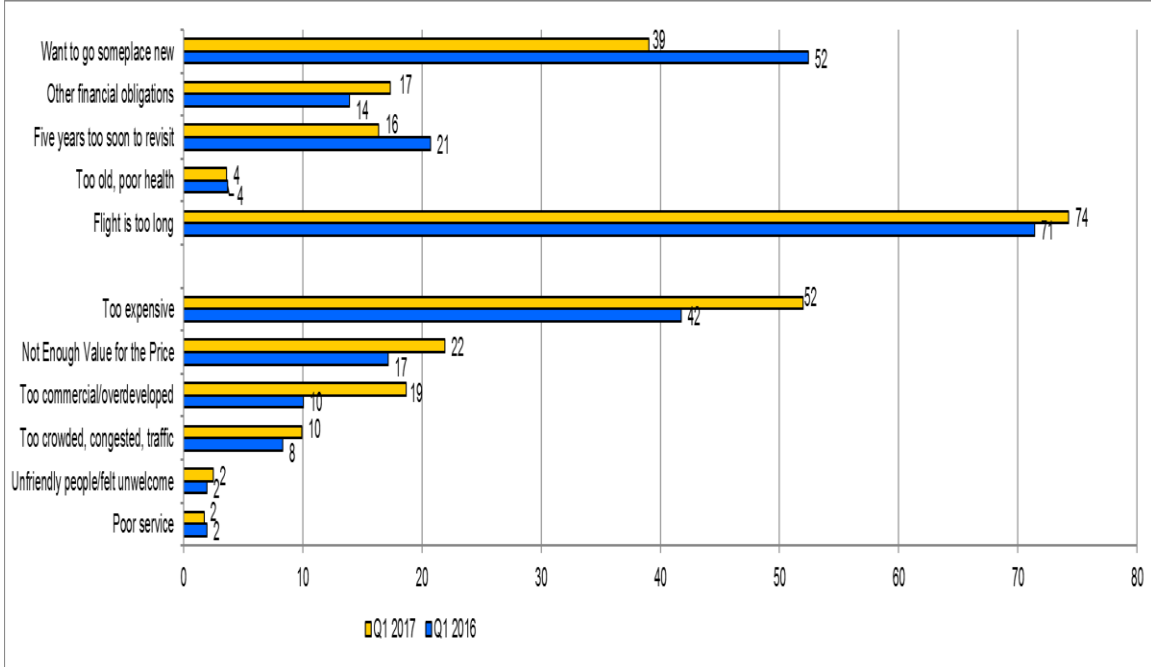
**Figure 4: Canadian Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Canadian respondents in the first quarter of 2017, the desire to go someplace new (47%) continued to be the main barrier to revisiting Hawai'i. Other reasons for not returning were the long flight (38%), other financial obligations (19%) and five years is too soon to revisit (17%).

The high cost has become an increasing concern for Canadian visitors. Over 60 of the respondents in first quarter 2017 said they will not revisit because Hawai'i is too expensive, up 11 points from last year. Close to 30 percent of the respondents indicated that there is not enough value for the price they paid.

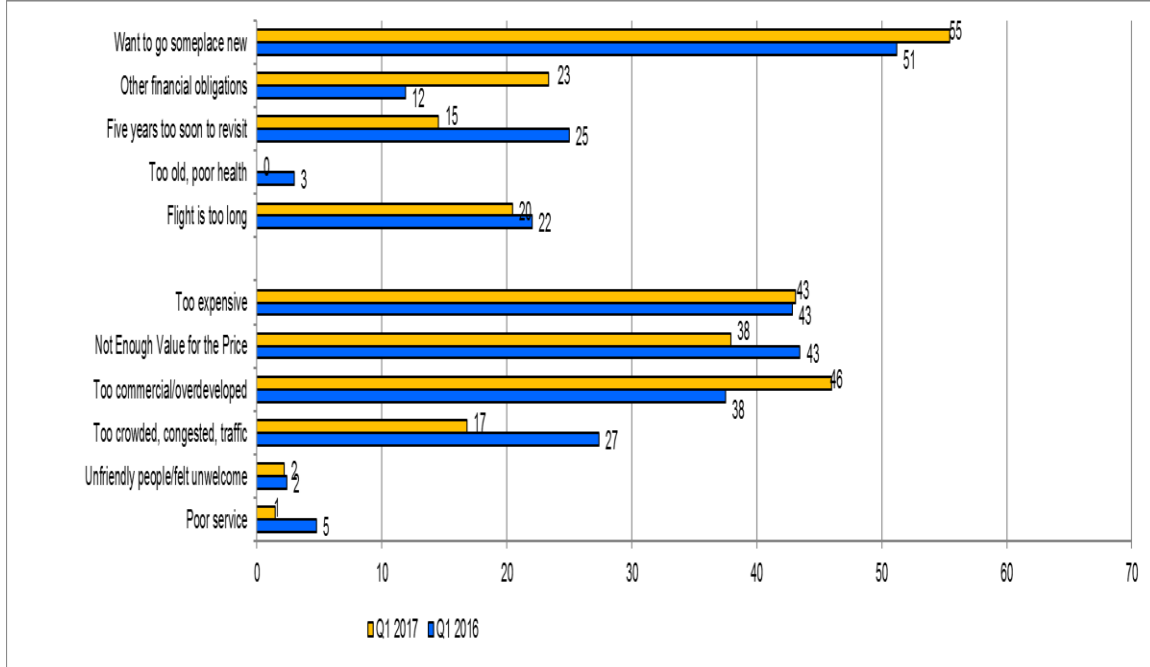
**Figure 5: European Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of European Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



For European respondents, the long flight (+3 points to 74%) continued to be the main barrier to revisiting the islands. Fewer respondents cited the desire to go someplace new (-13 points to 39%) compared to first quarter 2016.

Over half of the respondents in first quarter 2017 said they will not revisit because Hawai'i is too expensive (52%), up 10 points from last year. More respondents indicated that there is not enough value for the price they paid (+5 points to 22%) and that Hawai'i is too commercial/overdeveloped (+9 points to 19%).

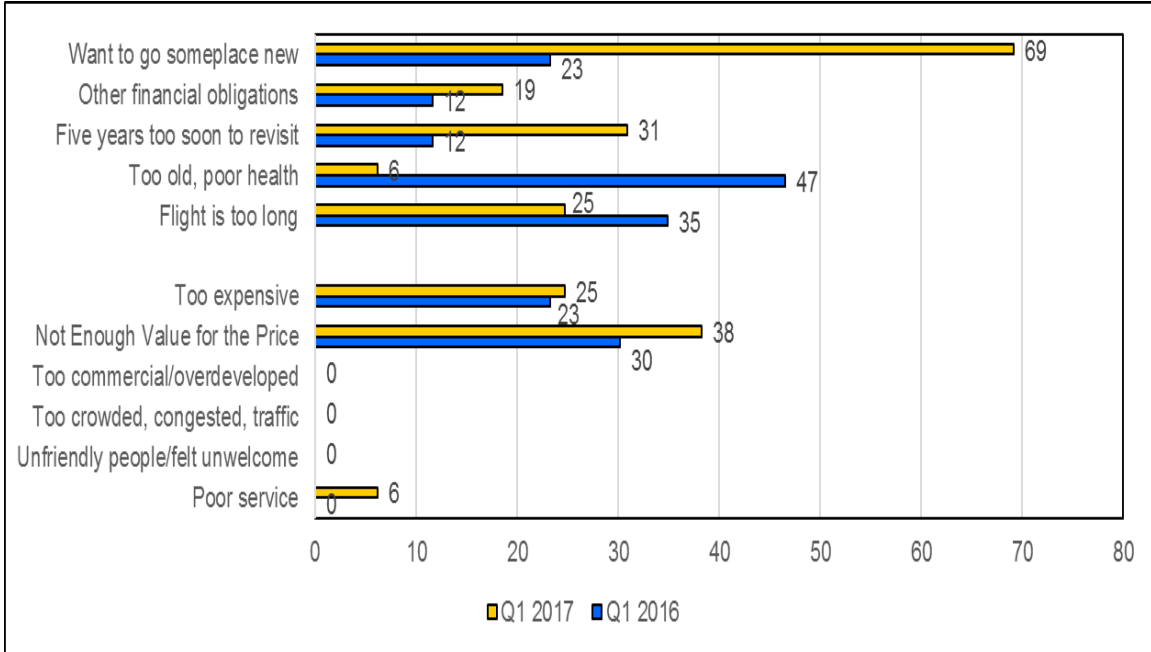
**Figure 6: Oceania Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Oceania visitors, the most cited barrier to revisiting Hawai'i continued to be the desire to go someplace new (55%), similar to a year ago. More visitors said they have other financial obligations (+11 points to 23%) while fewer said that five years is too soon to revisit (-10 points to 15%).

In terms of performance-related issues, more respondents felt that Hawai'i is too commercial/developed (+8 points 46%) compared to first quarter 2016. Other reasons for not returning were the high cost (43%), and not enough value for the price (-5 points to 38%).

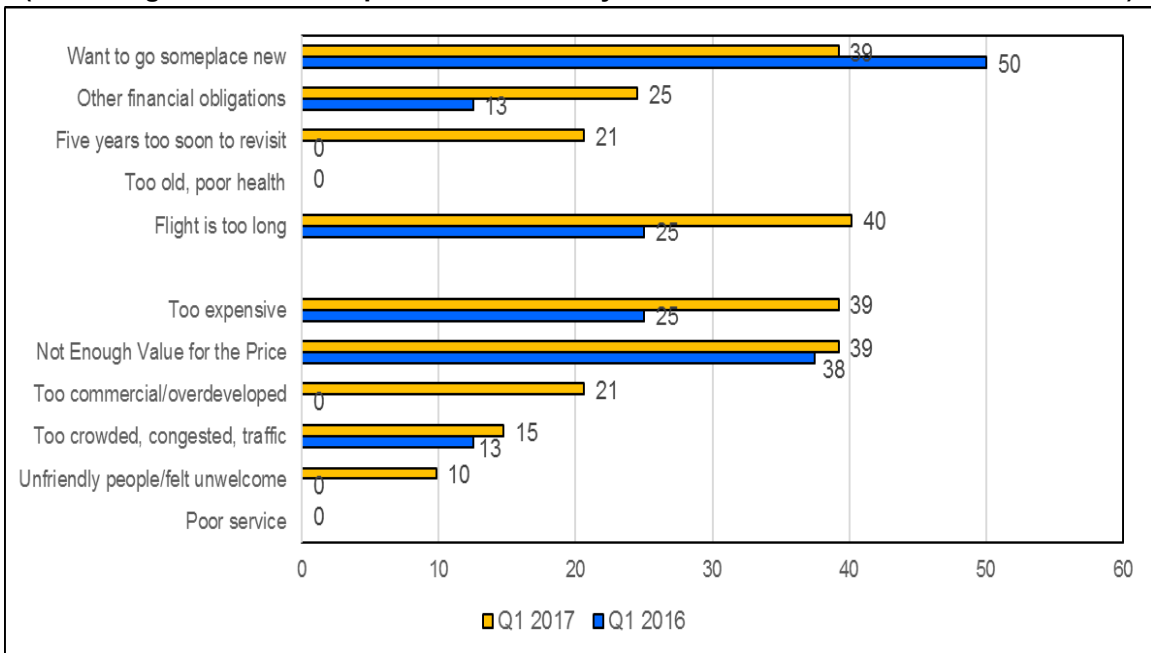
**Figure 7: Chinese Visitors' Reasons for Not Revisiting Hawai'i  
(Percentage of Chinese Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Chinese respondents in first quarter 2017, the desire to go someplace new (69%) was the main barrier to revisiting Hawai'i. Five years is too soon to revisit (31%) and the flight is too long (25%) were other reasons provided.

The most cited performance issues were not enough value for the price (38%) and the high cost (25%).

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



For Korean respondents in first quarter 2017, the most cited barriers to returning was the long flight (40%) and the desire to go someplace new (39%).

In terms of performance-related issues, four out of ten respondents felt Hawai'i is too expensive and that there was not enough value for the price they paid.

## Individual Island Experience

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

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	46	53	57	49	50	57	55	58	80	79	81	79	81
Maui	63	67	68	68	65	68	65	71	86	91	84	87	87
Island of Hawai'i	57	58	69	62	64	65	61	66	79	82	82	79	87
Kaua'i	59	70	75	70	71	69	71	72	93	94	92	93	89

P=Preliminary.

Most U.S. West visitors in first quarter 2017 gave excellent ratings to the island they visited. Rating for the island of Hawai'i improved 8 points from first quarter 2016.

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	55	59	58	57	63	60	55	59	78	78	77	78	83
Maui	73	79	75	70	72	77	74	76	90	90	89	91	91
Island of Hawai'i	59	64	64	57	70	73	65	67	81	84	84	82	88
Kaua'i	66	81	83	76	77	83	79	80	90	94	93	93	96

P=Preliminary

Over 90 percent of U.S. East respondents who visited Kaua'i and Maui in first quarter 2017 rated their experience as excellent. The island of Hawai'i received excellent ratings from 88 percent of the respondents, while 83 percent gave excellent marks to O'ahu. Ratings for the island of Hawai'i (+7 points), O'ahu (+5 points) and Kaua'i (+5 points) were higher than a year ago.

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	52	53	62	56	61	56	57	54	73	77	77	76	79
Maui	50	49	62	71	65	53	57	47	71	75	70	75	76
Island of Hawai'i	59	63	64	56	54	58	57	46	28	66	72	74	78
Kaua'i	51	62	31	53	43	71	60	29	63	85	70	70	69

P=Preliminary. Samples of Japanese respondents on Maui, Kaua'i and the Island of Hawai'i were limited.

The majority of Japanese respondents who visited O'ahu, Maui, Kaua'i and the island of Hawai'i in first quarter 2017 rated their experience as excellent.

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	49	55	59	60	55	59	51	58	76	79	78	78	80
Maui	63	61	72	64	60	68	70	69	86	90	86	87	88
Island of Hawai'i	57	60	60	63	64	58	63	54	58	76	76	75	82
Kaua'i	56	63	69	68	64	70	72	69	89	89	91	89	88

P=Preliminary.

A larger percentage of Canadian respondents in first quarter 2017 continued to give excellent ratings to Kaua'i and Maui compared to O'ahu and the island of Hawai'i. Ratings for the Island of Hawai'i improved 24 points from first quarter 2016.

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	51	46	61	46	59	55	54	57	80	77	78	77	77
Maui	65	57	71	66	67	68	70	70	90	84	88	87	86
Island of Hawai'i	53	62	55	68	61	60	61	64	63	74	79	74	86
Kaua'i	81	73	87	70	78	78	81	76	93	95	94	93	93

P=Preliminary.

European respondents in first quarter 2017 continued to rate Kaua'i the highest among the islands. Rating for the island of Hawai'i improved 23 points to match Maui's rating of 86 percent.

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

Island	2014				2015				2016P				2017
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
O'ahu	52	50	52	50	61	56	53	52	76	78	77	78	79
Maui	53	67	55	64	65	59	56	54	70	89	76	81	81
Island of Hawai'i	48	62	58	66	57	52	55	59	79	83	77	81	91
Kaua'i	40	71	53	66	52	65	62	66	69	89	83	86	79

P=Preliminary.

In first quarter 2017, the Island of Hawai'i received excellent ratings from 91 percent of respondents from Oceania, up 2 points from a year ago. Ratings for Maui and Kaua'i also improved by 11 points and 10 points, respectively.

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

Island	2016				2017
	Q1	Q2	Q3	Q4	Q1
O'ahu	80	72	79	78	76
Maui	88	59	85	79	86
Hawai'i Island	86	70	81	80	72
Kaua'i	91	74	94	84	79

P=Preliminary. Samples of Chinese respondents on Maui, Kaua'i and the Island of Hawai'i were limited.

In first quarter 2017, 76 percent of Chinese respondents gave excellent ratings to their visit to O'ahu, about the same as last year.

**Table 12: Island Experience Rated as Excellent – Korea  
(Percentage of Korean Respondents by Island)**

Island	2016				2017
	Q1	Q2	Q3	Q4	Q1
O'ahu	80	82	73	78	73
Maui	82	82	73	80	85
Hawai'i Island	72	77	72	72	92
Kaua'i	79	93	81	83	67

P=Preliminary. Samples of Korean respondents on Maui, Kaua'i and the Island of Hawai'i were limited.

O'ahu received excellent ratings from 73 percent of Korean respondents in first quarter 2017, down 7 points from first quarter 2016.

## TRIP PLANNING

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

**Table 13: Trip Decision Making - U.S. West**  
(Percent of U.S. West visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	4.1%	19.0%	11.3%	32.5%	27.4%	5.7%	0.0%
Decide to visit Hawai'i	4.2%	17.0%	11.0%	32.2%	29.4%	6.2%	0.0%
Decide which island to visit	3.1%	14.5%	11.9%	33.5%	30.7%	6.3%	9.7%
Travel dates	2.3%	11.9%	10.6%	32.7%	35.8%	6.7%	11.4%
Accommodations- where to stay	1.9%	12.1%	10.5%	29.8%	38.6%	7.1%	11.7%
Airline reservations	0.2%	5.2%	9.1%	33.5%	44.2%	7.7%	11.2%
Purchase airline tickets	0.2%	4.8%	8.8%	32.7%	45.5%	7.9%	11.2%
Accommodation- reservations	2.3%	10.4%	10.7%	28.1%	39.9%	8.6%	12.1%
Rental car reservations	0.2%	2.3%	6.8%	21.2%	58.7%	10.8%	13.7%
Purchase tour/ attraction package	0.0%	0.5%	2.3%	11.3%	65.5%	20.3%	48.7%

The majority of U.S. West respondents in the first quarter of 2017 made the decision to take a vacation (65.7%) and to choose Hawai'i as a vacation destination (67.8%) within six months before their trip. Actual reservations and ticket purchases took place closer to the date of travel. Half of the respondents made airline (51.9%) and accommodation (48.5%) reservations, while 69.5 percent made rental car reservations within 3 months before their trips to Hawai'i. Over 65 percent purchased tour or attraction packages between one to three months out, while 20.3 percent waited until less than one month before arrival. Additionally, 48.7 percent purchased packaged tours during their trip.

**Table 14: Trip Decision Making - U.S. East**  
(Percent of U.S. East visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	4.7%	20.4%	12.9%	31.0%	28.3%	2.7%	0.0%
Decide to visit Hawai'i	5.7%	19.3%	11.4%	31.8%	28.7%	3.0%	0.0%
Decide which island to visit	3.4%	18.3%	11.5%	29.9%	33.3%	3.7%	10.3%
Travel dates	2.1%	14.6%	11.0%	32.2%	36.4%	3.8%	10.6%
Accommodations- where to stay	2.8%	13.9%	10.2%	28.0%	39.7%	5.4%	11.1%
Airline reservations	0.3%	6.4%	9.1%	32.3%	46.5%	5.5%	11.4%
Purchase airline tickets	0.3%	5.9%	9.3%	32.1%	47.0%	5.6%	10.3%
Accommodation- reservations	1.7%	11.0%	10.1%	29.0%	42.1%	6.1%	10.4%
Rental car reservations	0.7%	3.4%	6.4%	24.8%	52.5%	12.2%	16.8%
Purchase tour/ attraction package	0.0%	0.0%	2.2%	15.3%	64.4%	18.1%	50.8%



Over 60 of U.S. East visitors decided on a vacation and decided to visit Hawai'i within six months before arrival. Half of the respondents made their airline reservations (52%), purchased their airline tickets (52.5%) and made their lodging reservations (48.2%) within 3 months before their trip. The majority waited three months or less to make car reservations (64.7%) and purchase tour packages (82.5%). Half of the U.S. East respondents purchased packaged tours while their trip was in progress.

**Table 15: Trip Decision Making - Japan**  
(Percent of Japanese visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	0.6%	10.0%	3.8%	31.1%	47.1%	7.5%	N/A
Decide to visit Hawai'i	1.1%	8.7%	4.4%	34.7%	45.2%	5.9%	N/A
Decide which island to visit	0.6%	9.0%	3.8%	32.6%	46.6%	7.3%	N/A
Travel dates	0.4%	6.4%	4.4%	31.0%	50.1%	7.6%	N/A
Accommodations- where to stay	0.3%	4.0%	3.1%	27.3%	57.3%	8.0%	16.9%
Airline reservations	0.3%	5.8%	2.9%	28.4%	54.9%	7.8%	17.2%
Purchase airline tickets		2.2%	4.1%	25.2%	58.4%	10.1%	13.0%
Accommodation- reservations		4.3%	3.4%	28.5%	54.5%	9.3%	13.7%
Rental car reservations		3.1%		12.3%	52.0%	32.6%	6.9%
Purchase tour/ attraction package		0.5%		16.0%	61.3%	22.2%	25.5%

Japanese visitors in first quarter 2017 continued to have a relatively short planning and booking window. Three months or less before their arrival, 54.6 percent of the respondents decided to take a vacation, 51.1 percent decided to visit Hawai'i and 54 percent decided on the islands they wanted to visit. Within three months of their trip, the majority of the respondents made airline reservations (62.6%), purchased airline tickets (68.5%), and made accommodation reservations (63.8%). Most of the respondents made rental car reservations (84.7%) and purchased tour and attraction packages (83.5%) within three months before arriving in Hawai'i. A quarter of the respondents purchased tour packages during their trip.

**Table 16: Trip Decision Making - Canada**  
(Percent of Canadian visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	3.5%	22.1%	10.9%	28.4%	30.2%	4.9%	0.0%
Decide to visit Hawai'i	3.8%	21.4%	11.3%	26.6%	31.6%	5.3%	0.0%
Decide which island to visit	2.8%	18.5%	11.6%	27.4%	34.1%	5.6%	11.9%
Travel dates	2.2%	16.0%	11.3%	28.9%	35.7%	6.0%	12.7%
Accommodations- where to stay	2.4%	14.0%	9.8%	27.2%	39.7%	6.9%	12.7%
Airline reservations	0.2%	6.4%	10.9%	30.4%	45.2%	6.9%	13.2%
Purchase airline tickets	0.2%	5.9%	10.8%	30.9%	44.9%	7.3%	12.4%
Accommodation- reservations	1.8%	13.3%	10.0%	27.0%	40.8%	7.1%	12.9%
Rental car reservations	0.4%	4.5%	6.8%	23.0%	55.8%	9.4%	19.1%
Purchase tour/ attraction package	0.0%	0.6%	1.9%	10.8%	67.0%	19.9%	51.2%

Similar to U.S. East visitors, two third Canadian respondents in first quarter 2017 decided on a vacation (63.5%), decided to visit Hawai'i (63.5%) and decided on which islands to visit (67.1%) within six months prior to arrival. Half of the respondents purchased airline tickets (52.2%) and

reserved accommodations (47.9%) within three months before their trip. The majority made car reservations (65.3%) and purchased tour packages (86.8%) in the last three months before arriving. Half of the respondents purchased tour packages while their trip is in progress.

**Table 17: Trip Decision Making - Europe**  
(Percent of European visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	6.2%	19.8%	12.0%	36.9%	23.3%	1.7%	0.0%
Decide to visit Hawai'i	6.1%	21.0%	10.8%	33.5%	26.7%	1.9%	0.0%
Decide which island to visit	3.1%	15.6%	11.3%	31.8%	35.3%	2.8%	14.7%
Travel dates	3.0%	14.6%	12.2%	36.6%	30.4%	3.2%	9.4%
Accommodations- where to stay	1.7%	10.0%	9.7%	29.8%	44.4%	4.4%	12.9%
Airline reservations	0.8%	9.7%	9.5%	37.4%	38.8%	3.8%	9.3%
Purchase airline tickets	0.7%	9.4%	9.0%	37.1%	40.0%	3.8%	8.5%
Accommodation- reservations	1.6%	8.2%	9.8%	28.8%	46.5%	5.0%	10.1%
Rental car reservations	0.0%	5.2%	3.9%	19.4%	63.8%	7.7%	16.1%
Purchase tour/ attraction package	1.0%	4.7%	0.8%	13.6%	61.1%	18.7%	54.6%

The majority of European respondents took six months or less to decide to take a vacation (61.9%) and to pick Hawai'i as the destination (62%). About half of the respondents made their airline reservations (42.6%), purchased airlines tickets (43.7%) and made their lodging reservations (51.4%) within three months prior to arriving. The majority made car reservations (71.5%) and purchased tour packages (79.9%) within three months before their arrival date. Over half of the respondents purchased tour and attraction packages during their trip.

**Table 18: Trip Decision Making - Oceania**  
(Percent of Oceania visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip	8.3%	21.0%	16.2%	39.0%	14.0%	1.5%	0.0%
Decide to visit Hawai'i	4.7%	22.4%	15.5%	39.0%	16.6%	1.7%	0.0%
Decide which island to visit	1.6%	17.6%	17.6%	40.8%	20.3%	2.1%	10.5%
Travel dates	2.2%	18.3%	16.0%	41.3%	19.1%	3.0%	10.5%
Accommodations- where to stay	0.6%	9.2%	15.8%	36.7%	33.4%	4.3%	12.1%
Airline reservations	0.7%	12.3%	18.6%	40.8%	25.3%	2.3%	9.5%
Purchase airline tickets	0.4%	12.7%	17.3%	39.9%	27.0%	2.8%	9.6%
Accommodation- reservations	0.0%	8.4%	14.1%	35.3%	38.7%	3.5%	12.8%
Rental car reservations	0.0%	4.6%	5.5%	21.4%	56.4%	12.3%	21.4%
Purchase tour/ attraction package	0.0%	7.0%	14.7%	22.1%	47.3%	9.0%	57.6%

Over half of the Oceania respondents decided to take a vacation (54.5%) and decided to visit Hawai'i (57.4%) within six months before arrival. Close to 40 percent respondents made airlines reservations (40.8%), purchased tickets (39.9%), made accommodation reservations (35.3%) between four to six months before their trip. The majority reserved rental cars (68.6%) and purchased tour/attraction packages (56.2%) within three months of arrival, and many also purchased tour and attraction packages (57.6%) during their trip.

**Table 19: Trip Decision Making - China**  
(Percent of Chinese visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip		0.9%		20.9%	65.8%	12.3%	N/A
Decide to visit Hawai'i		4.3%	3.1%	20.2%	58.2%	14.2%	N/A
Decide which island to visit		2.2%	2.7%	15.6%	63.4%	16.1%	N/A
Travel dates		5.0%	3.1%	16.0%	67.7%	8.2%	N/A
Accommodations- where to stay		2.3%	3.9%	12.1%	63.8%	17.9%	21.7%
Airline reservations		1.8%	1.8%	12.9%	68.3%	15.1%	21.9%
Purchase airline tickets		2.2%		13.8%	68.0%	16.0%	17.3%
Accommodation- reservations		2.4%	2.0%	14.6%	63.0%	18.1%	16.8%
Rental car reservations				8.2%	64.1%	27.7%	14.1%
Purchase tour/ attraction package					61.9%	38.1%	17.9%

Many Chinese respondents in first quarter 2017 made their travel decisions in a relatively short time. Between one to three months prior to arrival, the majority of the respondents decided to visit Hawai'i (58.2%), decided on the islands they wanted to visit (63.4%) and set their travel dates (67.7%). Two thirds of the respondents also made airline reservations, purchased airline tickets, made accommodation reservations, made rental car reservations, and purchased tour and attraction packages between one to three months before their trip.

**Table 20: Trip Decision Making - Korea**  
(Percent of Korean visitors for each response, First Quarter 2017)

	TIME BEFORE DEPARTURE						During the trip
	More than 1 year	10-12 months	7-9 months	4-6 months	1-3 months	Less than 1 month	
Decide to take vacation/ pleasure trip		2.4%	4.3%	25.0%	54.9%	13.4%	N/A
Decide to visit Hawai'i		2.4%	6.3%	23.5%	49.6%	18.2%	N/A
Decide which island to visit		1.1%	8.7%	24.9%	45.6%	19.6%	27.6%
Travel dates		1.4%	6.9%	26.7%	47.5%	17.5%	31.3%
Accommodations- where to stay		0.7%	4.6%	18.5%	57.2%	18.9%	23.3%
Airline reservations		0.7%	4.5%	26.7%	52.0%	16.1%	29.5%
Purchase airline tickets		0.8%	5.8%	26.6%	47.5%	19.3%	26.7%
Accommodation- reservations			3.5%	24.2%	53.9%	18.5%	23.7%
Rental car reservations			1.3%	15.6%	58.1%	24.9%	21.3%
Purchase tour/ attraction package		1.4%		10.8%	52.7%	35.1%	41.3%

Half of the Korean respondents in first quarter 2017 decided to visit Hawai'i (49.6%), decided on the islands they wanted to visit (45.6%) and set a travel date (47.5%) 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.

## Sources of Information used for Trip Planning

Visitors to Hawai'i used a variety of resources to plan their trip to the islands. This section shows the sources of information used by respondents who came in first quarter 2017.

**U.S. West:** While planning their trip to Hawai'i, U.S. West respondents in first quarter 2017 relied heavily on their personal experience (59%) and recommendations from friends/relatives (49%). Other sources used were information from airlines (38%), smartphone/tablet (35%), online travel booking site (31%) and online webpage/blog about Hawai'i (27%).

While their trip is in progress, U.S. West visitors used their personal experience (44%), smartphone/tablet (34%), and information from hotel/resort (30%).

**U.S. East:** Half of the U.S. East respondents in first quarter 2017 relied on their personal experience (53%) and recommendations from friends/relatives (49%) in planning their trip. A third of these visitors used online webpage/blog about Hawai'i (34%), information from airlines (34%), smartphone/tablet (33%), online social networking site (30%), and online travel booking site (29%).

During their trip, many U.S. East respondents used information from hotels/resorts (39%) and smartphone/tablet (39%) to find information about Hawai'i.

**Japan:** Japanese respondents in first quarter 2017 relied heavily on travel agents (64%) in planning their trip. Guide books (47%), recommendations from friends/relatives (37%), personal experience (35%), magazines (34%), online webpage/blog about Hawai'i (34%), smartphone/tablet (30%), and online travel booking sites (31%) were other resources used.

While their trip was in progress, Japanese respondents used guide books (31%), sought help from hotels/resorts front desks/tour desks (19%), and used smartphone/tablet (19%) to access information about Hawai'i.

**Canada:** Half of the Canadian respondents who visited Hawai'i in first quarter 2017 relied on their personal experience (58%) and recommendations from friends/relatives (49%) in planning their trip. Many respondents also used online travel booking sites (41%), online webpage/blog about Hawai'i (40%), information from airlines (36%), online social networking sites (34%) and smartphone/tablet (34%).

During their trip, many Canadian respondents relied on their personal experience (42%) and used smartphone/tablet (34%), guide books (32%) and information from hotels/resorts (31%).

**Europe:** While planning their trip to the islands, many European respondents in first quarter 2017 used recommendations from friends/relatives (46%), guide books (42%), online webpage/blog about Hawai'i (40%), online social networking sites (40%) and travel agents (36%).

While their trip is in progress, many European respondents used information from hotels/resorts (38%), guide books (36%) and smartphone/tablet (36%).

**Table 21: Resources Used in Planning their Trip to Hawai'i – First Quarter 2017  
(Percentage of Respondents who used these Information)**

			MMA							
			U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Travel agents/ Companies specializing in packaged tours	Before		19%	24%	64%	18%	36%	55%	35%	49%
	During		6%	10%	17%	10%	13%	12%	10%	15%
	After		1%	1%	4%	1%	2%	2%	4%	5%
	Not used		76%	70%	33%	74%	55%	39%	60%	44%
Information from airline/ commercial carriers	Before		38%	34%	21%	36%	35%	34%	13%	36%
	During		9%	11%	6%	10%	12%	10%	4%	4%
	After		1%	2%	2%	2%	1%	1%	0%	1%
	Not used		58%	63%	75%	61%	59%	61%	83%	61%
Hotel/Resort- front desk, concierge/ tour desk	Before		17%	17%	14%	15%	16%	12%	14%	36%
	During		30%	39%	19%	31%	38%	50%	12%	15%
	After		2%	1%	1%	1%	1%	2%	2%	1%
	Not used		59%	51%	70%	59%	49%	40%	74%	53%
Personal experience	Before		59%	53%	35%	58%	34%	41%	26%	31%
	During		44%	37%	17%	42%	29%	25%	13%	13%
	After		16%	14%	4%	15%	10%	8%	11%	5%
	Not used		30%	39%	60%	32%	52%	49%	64%	60%
Recommendations from Friends or relatives	Before		49%	49%	37%	49%	46%	53%	33%	47%
	During		27%	28%	13%	22%	20%	15%	10%	13%
	After		5%	5%	4%	4%	3%	2%	4%	4%
	Not used		44%	43%	56%	44%	47%	43%	62%	48%
Online travel booking site/ Online travel agent	Before		31%	29%	30%	41%	33%	43%	29%	39%
	During		4%	6%	6%	9%	9%	9%	9%	8%
	After		1%	1%	2%	2%	1%	1%	3%	1%
	Not used		68%	70%	67%	57%	62%	54%	66%	57%
Online webpage or blog covering Hawai'i	Before		27%	34%	34%	40%	40%	35%	24%	51%
	During		14%	20%	18%	24%	22%	16%	10%	28%
	After		2%	3%	5%	5%	5%	2%	4%	7%
	Not used		68%	62%	60%	55%	52%	60%	70%	39%
Online social networking site	Before		23%	30%	31%	34%	40%	32%	27%	62%
	During		16%	18%	20%	21%	26%	19%	10%	34%
	After		4%	5%	4%	6%	7%	5%	5%	10%
	Not used		70%	65%	63%	60%	54%	58%	68%	27%
Smartphone or tablet applications relevant to your trip	Before		35%	33%	30%	34%	32%	26%	25%	42%
	During		34%	39%	19%	34%	36%	32%	19%	26%
	After		5%	7%	3%	5%	4%	3%	4%	4%
	Not used		52%	50%	63%	53%	50%	57%	68%	46%
Hawai'i Visitors Bureaus website	Before		17%	23%	14%	24%	24%	23%	14%	22%
	During		8%	9%	4%	13%	15%	14%	7%	5%
	After		3%	2%	2%	3%	3%	4%	2%	2%
	Not used		78%	73%	83%	70%	68%	69%	79%	72%
Magazines	Before		9%	11%	34%	11%	13%	12%	7%	14%
	During		12%	12%	18%	16%	17%	12%	5%	8%
	After		2%	2%	3%	2%	2%	2%	1%	3%
	Not used		82%	81%	59%	77%	75%	78%	87%	77%
Television shopping channel/ television program	Before		4%	4%	15%	3%	3%	5%	4%	14%
	During		5%	5%	4%	5%	5%	5%	3%	3%
	After		1%	1%	3%	1%	1%	0%		2%
	Not used		92%	92%	82%	92%	90%	91%	93%	81%
Guide books	Before		24%	26%	47%	27%	42%	15%	10%	29%
	During		24%	23%	31%	32%	36%	19%	10%	18%
	After		3%	3%	5%	3%	4%	1%	2%	5%
	Not used		66%	64%	45%	57%	46%	72%	80%	59%

**Oceania:** Respondents from Oceania primarily used travel agents (55%) in planning their trip to Hawai'i. Many also used recommendations from friends/relatives (53%), online travel booking sites (43%), personal experience (41%), online webpage/blog about Hawai'i (35%), information from airlines (34%) and online social networking sites (32%).

During their trip, many visitors received information from hotels/resorts (50%) and used smart phones and tablets (32%).

**China:** A third of the Chinese respondents in first quarter 2017 used travel agents (35%) and recommendations from friends/relatives (33%) in planning their trip to Hawai'i. Some used online travel booking sites (29%), online social networking sites (27%), and smartphone/tablet (25%).

During their trip, some respondents used smartphone/tablet (19%) and information from hotels/resorts (12%).

**Korea:** Over half of the Korean respondents in first quarter 2017 used online social networking sites (62%) and online webpage/blog about Hawai'i (51%) in their trip planning. Travel agents (49%), recommendations from friends/relatives (47%) and smartphone/tablet (42%) were other popular resources.

While their trip was in progress, Korean respondents used online social networking sites (34%), online webpage/blog about Hawai'i (28%) and smartphone/tablet (26%).

## SURVEY METHODS

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

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

**Table 22: Number of Surveys Collected  
(First Quarter 2017)**

MMA	Completed	Margin of Error $\pm$
U.S West	955	3.17
U.S East	940	3.20
Canada	1,932	2.23
Japan	997	3.10
Europe	533	4.24
Oceania	438	4.68
China	213	6.71
Korea	279	5.87
All MMAs	6,287	1.24

Selected U.S., Japanese, Canadian, European and Oceania visitors were mailed a survey form or were contacted by email to complete the survey on-line. Beginning in January 2016, data for Chinese and Korean visitors were collected via intercept surveys at the Honolulu International Airport using iPad tablets. In the first quarter (January – March) of 2017, a total of 6,287 completed forms were received with a margin of error of  $\pm 1.24$  percentage points at the 95 percent confidence level.

Data collected from the online survey and from the iPad intercept surveys were merged with mailed survey data to form a single database for analysis. Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Results are presented only for classifications (MMA, islands visited, ports of entry, types of visitors, etc.) for which sample sizes are large enough to produce statistics with sample error estimates less than 10 points. Data from all MMAs were reported as weighted data based on weights generated for 2017 data. The 2017 VSAT weighting system was developed to adjust for disproportionate sampling across MMAs.

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