



2013 Visitors Media Usage Report

Addendum to the
2013 Visitor Satisfaction & Activity Report

HAWAII TOURISM

AUTHORITY

Hawai'i Convention Center
1801 Kālakaua Avenue
Honolulu, Hawai'i 96815
(808) 973-2255
www.hawaii tourism authority.org

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1. ABOUT THIS REPORT

The *2013 Visitor Satisfaction & Activity Report* (VSAT Report) presents the results of a survey conducted annually by the Hawai'i Tourism Authority (HTA) as part of its Tourism Research program. The VSAT report was published in October of 2014. The purpose of this addendum to the 2013 VSAT report is to provide additional data about the way media use influenced Hawai'i visitors' travel decisions.

VSAT surveys were administered to visitors from six Major Market Areas (MMAs): U.S. West, U.S. East, Canada, Japan, Europe and Oceania. The survey instrument was revised in 2012. Part of that revision included an expansion of the items measuring media and media use. Data prior to 2012 are not available.

AVAILABILITY OF THIS REPORT

This report and the 2013 VSAT report are available in pdf format on the HTA website. To download a copy, visit <http://www.Hawaiitourismauthority.org/research/reports/visitor-satisfaction> and click on Visitor Satisfaction and Activity Report. For further information on the content of this report, contact the HTA at (808) 973-2255.

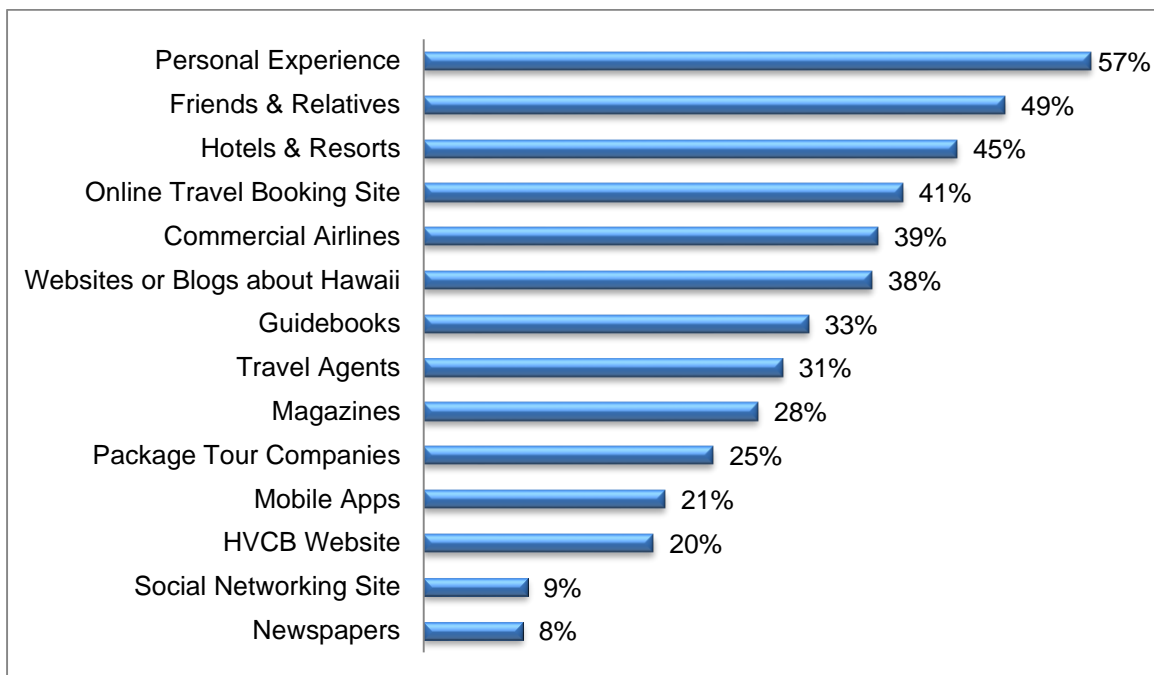
This report was produced by HTA's tourism research staff: Mr. Daniel Nahoopii, Director, Ms. Minh-Chau T. Chun, Ms. Jennifer Chun and Mr. Lawrence Liu. The President and CEO of HTA is Mr. George Szigeti.

2. VISITOR MEDIA

PRIOR TO DEPARTURE: SOURCES OF INFORMATION CONSULTED IN THE COURSE OF PLANNING A TRIP

Increasingly, travel planning is a multi-media experience. Technology has increased the quantity and accessibility of information available to travelers that influence their trip planning. Question 12 on the 2013 VSAT survey assessed the sources of information that visitors used in the planning of their trips to Hawai'i. Figure 1 presents, in order of frequency across all respondents, the various sources visitors consulted for information about Hawai'i for their trips.

Figure 1. *Percent of 2013 Hawai'i Visitors Who Consulted Each Source During Trip Planning.*



Across all visitors, personal experience and friends and family were the most prevalent sources of information for travelers to Hawai'i. About half of the visitors relied upon their own experience (57%) or advice from friends and relatives (49%). In addition, visitors consulted airlines (39%) and hotels (45%) for information during the course of planning their trips.

Online or electronic sources were also used to a considerable degree in many travelers' plans. In particular, online booking sites (41%) and Hawai'i-related websites or blogs (38%) were consulted by the largest number of travelers. Other media resources such as mobile apps (21%) and social networking sites (9%) were sources of information for fewer visitors.

Though the data suggest an overall trend toward reliance on personal and traditional sources (as opposed to online or electronic sources) of information in travel planning, there was some variation across MMAs in terms of what sources were most important to their respective visitors. Table 1 below presents the percentage of visitors by MMA who consulted each medium for information about Hawai'i.

Table 1. Sources of Information Consulted by 2013 Hawai'i Visitors from 6 MMAs During Pre-Departure Planning.

	US West	US East	Canada	Japan	Europe	Oceania
Personal Experience	68.4	55.7	60.2	37.3	46.2	40.4
Friends & Relatives	52.9	56.5	57.7	31.8	47.4	50.8
Hotels or Resorts	43.5	51.3	52.5	35.7	59.7	59.0
Online Booking Site	38.4	41.4	55.4	37.0	52.1	46.3
Commercial Airlines	41.2	41.8	45.1	26.6	46.2	39.9
Hawaii Webpage, Blog	31.3	39.3	46.0	47.4	57.5	34.0
Guidebooks	25.6	32.9	35.4	48.3	53.6	15.4
Travel Agents	14.8	24.7	21.8	62.3	44.3	66.4
Magazines	19.7	21.4	26.2	56.6	27.8	20.6
Package Tour Companies	19.4	27.6	25.5	28.8	29.4	33.9
Mobile Apps	20.7	23.3	20.5	17.3	28.5	16.3
HVCB Website	14.7	25.0	28.4	19.4	27.9	20.9
Social Networking Site	7.7	10.4	11.3	7.3	13.9	11.8
Newspapers	8.4	9.1	11.6	5.5	12.7	11.5

Note. Yellow highlights indicate the information medium most frequently reported as a source of Hawai'i-related information by visitors from each MMA.

In general, Japanese visitors tended to rely heavily on travel agents (62%) and other published materials including magazines (57%), guidebooks (48%), and websites (47%) for information about Hawai'i. Travelers from Oceania relied heavily on travel agents (66%) and hotels & resorts (59%). U.S. visitors relied more heavily on personal experience and friends and relatives than any other source of information during their travel planning.

MEDIA USE BY VISITORS IN 2012 AND 2013

Overall, there were negligible differences in the extent to which visitors in 2013 used various media for information about Hawai'i as compared to visitors in 2012. The most substantial change was in the use of mobile apps for Hawai'i-related information, the use of which increased 3.9 percentage points between 2012 and 2013. Although there were small decreases in the use of personal experience (-1.6 points) and consultation of hotels or resorts (-1.3 points), these sources continue to be among the top 3 most frequently consulted sources of information for visitors.

Table 2. *Media Consulted by Visitors in 2012 and 2013.*

	Any Use 2012	Any Use 2013	Difference
Personal experience	58.3	56.7	-1.6
Friends & relatives	47.6	49.4	1.8
Hotels or resorts	46.6	45.3	-1.3
Online booking site	40.8	40.7	-0.1
Commercial Airlines	38.4	38.6	0.2
Hawaii Webpage, Blog	37.8	38.1	0.3
Guidebooks	32.7	32.7	0.0
Travel Agents	29.6	30.5	0.9
Magazines	29.7	28.4	-1.3
Package Tour Companies	22.7	24.6	1.9
Mobile App	16.6	20.5	3.9
HVCB website	20.3	19.5	-0.8
Social Networking Site	7.4	8.8	1.4
Newspapers	9.1	8.4	-0.7

AFTER DEPARTURE: SOURCES OF INFORMATION CONSULTED DURING AND AFTER THE TRIP

Table 3. *Percent of 2013 Visitors Who Used Various Sources for Information about Hawai'i During and After Their Trips.*

	During Trip	After trip
Magazines	9.4	1.4
Books	9.3	1.4
Phone, tablet app.	8.9	0.7
Hotel & resorts	7.8	-. ¹
Package tour companies	5.3	-
Personal experience	4.8	-
Online webpage, blog	4.8	1.2
Newspapers	4.1	0.3
Friends & relatives	4.0	-
HVCB website	2.8	0.5
Online booking site	2.5	0.4
Travel agent	1.8	1.1
Social networking	1.6	0.7
Airlines	1.3	-

Note. In the After Trip category, Travel Agents, Airlines, Friends & Relatives, Personal Experience, Package Tour Companies, and Hotels & Resorts were not options for selection.

The 2013 VSAT also inquired about sources of information travelers used while in the midst of travel and after their return home. Very few visitors reported consulting any resource for Hawai'i-related information during and after their trips. As compared to while they were planning their trips, 2013 visitors did much less research while their trips were in progress.

Table 3 presents the percent of 2013 visitors who consulted various sources for trip-related information during and after their visits. Magazines (9.4%), guidebooks (9.3%), and mobile apps (8.9%) were the most frequently used sources for visitors already in Hawai'i. Upon returning home, guidebooks (1.4%) and magazines (1.4%) were most frequently consulted by those visitors who did any post-trip research.

3. FUNCTIONS OF MEDIA

WAYS VISITORS USE SOURCES OF INFORMATION

Visitors to Hawai'i used a wide variety of resources to plan their trip. This section covers the functions served by five sources of information: the internet, friends and relatives, travel agents, guidebooks, and mobile apps.

Table 4. *Functions of the Internet for All MMAs.*

	US-West	US-East	Canada	Japan	Europe	Oceania	All MMAs
Making airline reservations	84.1	76.0	79.4	32.7	58.4	40.3	70.7
Choosing an airline	80.1	73.0	78.2	35.1	62.5	45.9	68.9
Airport check-in	71.3	68.0	69.8	32.1	63.2	44.2	62.5
Making hotel/lodging reservations	62.5	59.8	70.5	30.0	60.9	55.4	56.7
Checking weather	54.3	56.9	70.2	52.4	61.5	60.6	56.3
Making car rental reservations	65.9	58.0	66.2	19.1	49.7	24.1	54.0
Planning activities	52.5	57.4	60.9	40.2	58.9	59.9	52.7
Estimating costs of trip	53.7	55.5	61.8	23.9	53.0	51.5	49.7
Finding restaurants	45.5	49.1	48.9	52.8	43.9	47.4	47.9
Deciding on vacation destination	46.6	45.9	58.4	36.9	52.6	48.9	46.0
Accessing maps and directions, GPS	40.1	44.1	49.9	42.4	40.6	39.6	42.2
Finding places to shop	33.2	35.5	40.1	50.6	37.2	48.0	37.9
Purchasing tour or attraction packages	30.1	38.8	35.9	31.2	33.6	33.6	33.0
Other	1.6	1.5	1.4	1.3	0.8	2.3	1.5

Note. These data do not represent a sum of people who reported using various channels (e.g., websites, blogs, etc.) to access the internet. Question 13 on the VSAT survey asked about internet use but did not specify the channel via which the internet was accessed.

As noted previously, all data in Section 2 of this report were drawn from Question 12 on the VSAT survey. Data presented in this section are drawn from Question 13 on the survey. Although some of the same sources of information appear in both questions, none of the data from Question 12 are included in tables 4 to 8. Differences in the wording of the two questions may result in different totals of visitors who report using friends or relatives, travel agents, guidebooks, and mobile apps. “Internet” was not listed as a source in Question 12.

Table 4 summarizes functions served by internet use across all six MMAs. Yellow highlights indicate the most frequently reported function within each MMA. Visitors from U.S. West (84.1%), U.S. East (76%) and Canada (79.4%) most frequently reported using the internet to book airline tickets. Visitors from Europe (63.2%) reported using the internet most often to complete airline check-ins. Japanese visitors primarily used the internet to find restaurants (52.8%). Visitors from Oceania relied most heavily on the internet to check the weather (60.6%).

Table 5. *Functions of Consulting with Friends and Family for All MMAs.*

	US- West	US- East	Canada	Japan	Europe	Oceania	All MMAs
Deciding on vacation destination	58.4	63.4	65.7	51.5	61.2	59.5	59.4
Planning activities	59.1	64.9	57.9	33.0	53.9	45.7	56.2
Finding restaurants	58.3	61.1	51.6	43.3	50.1	38.0	55.4
Finding places to shop	38.0	39.6	41.3	42.7	39.7	48.2	39.8
Making hotel/lodging reservations	30.1	29.3	25.9	18.0	17.7	10.1	26.8
Purchasing tour or attraction packages	14.4	22.6	16.6	15.3	17.0	9.9	16.7
Choosing an airline	15.0	16.7	15.9	20.0	10.2	11.9	16.0
Estimating costs of trip	14.2	16.7	16.8	16.4	11.6	9.7	15.1
Accessing maps and directions, GPS	12.1	14.7	14.9	19.9	11.5	6.7	13.8
Making car rental reservations	13.1	13.5	14.6	9.1	11.7	4.8	12.4
Making airline reservations	11.0	13.2	10.2	13.0	8.0	3.9	11.4
Airport check-in	4.4	7.4	4.9	12.1	3.9	4.2	6.3
Checking weather	5.3	6.9	4.5	4.7	3.1	3.3	5.4
Other	0.8	0.8	0.5	1.8	0.4	0.2	0.9

Table 5 summarizes functions served by talking to friends and relatives for six MMAs. For all visitor markets except Japan, close to 50 percent of the visitors consulted with friends or family about their trips. Japanese visitors consulted friends and family about 30 percent of the time. Visitors from both U.S. West and U.S. East reported that their activity plans were most frequently influenced by advice received from friends and relatives. For visitors from the other markets friends and relatives predominantly influenced their decision to choose Hawai'i as a vacation destination.

Table 6. *Functions of Consulting with Travel Agents for All MMAs.*

	US- West	US- East	Canada	Japan	Europe	Oceania	All MMAs
Making airline reservations	48.4	54.9	48.8	78.1	71.7	78.9	64.6
Choosing an airline	44.8	52.5	45.9	74.6	67.9	76.0	61.3
Making hotel/lodging reservations	44.5	52.2	37.2	72.1	59.9	64.1	58.4
Deciding on vacation destination	28.6	35.9	22.9	65.7	46.2	54.4	46.8
Estimating costs of trip	23.9	35.0	19.8	63.2	40.6	45.2	43.3
Purchasing tour or attraction packages	38.2	46.7	40.8	47.4	32.1	28.2	42.4
Planning activities	25.0	30.0	19.9	37.4	23.9	23.5	30.3
Airport check-in	19.9	19.2	26.0	41.6	21.2	30.7	29.5
Making car rental reservations	40.7	35.4	28.1	10.3	35.9	14.1	24.6
Finding restaurants	14.6	12.5	12.1	16.8	6.2	6.1	13.9
Accessing maps and directions, GPS	8.6	5.8	9.3	13.9	6.1	3.8	9.6
Finding places to shop	9.1	7.0	9.7	11.5	4.8	9.0	9.5
Checking weather	3.0	3.5	4.1	9.4	2.2	2.8	5.6
Other	0.9	0.8	1.4	1.4	1.4	0.5	1.0

Table 6 summarizes functions served by talking to travel agents for six MMAs. About 60 percent of visitors from Japan and Oceania; and 40 percent of visitors from Europe used a travel agent for information on trip planning. Usage of travel agents were lower among U.S. West, U.S. East and Canadian visitors. Across all visitor markets, those who consulted with travel agents mainly used them to make airline reservations, choose an airline; and make hotel/lodging reservations.

Table 7. *Functions of Guidebooks for All MMAs.*

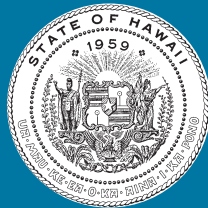
	US- West	US- East	Canada	Japan	Europe	Oceania	All MMAs
Finding restaurants	58.7	60.0	62.2	68.8	56.8	47.4	61.7
Planning activities	66.8	64.5	63.5	28.9	66.7	43.7	53.9
Finding places to shop	39.9	42.7	49.3	75.8	45.8	42.4	52.1
Accessing maps and directions, GPS	40.0	39.9	48.2	65.5	39.4	31.9	47.9
Purchasing tour or attraction packages	23.8	26.0	24.5	14.5	22.5	35.2	22.0
Deciding on your vacation destination	13.6	21.3	17.9	17.0	28.0	14.9	17.1
Estimating costs of trip	6.6	5.1	5.8	5.0	8.5	4.7	5.7
Checking weather	3.7	3.4	4.8	4.6	5.2	2.3	4.0
Making hotel/lodging reservations	2.5	5.6	4.2	2.0	5.1	1.6	3.2
Airport check-in	0.5	0.3	0.2	6.7	0.5	0.4	2.2
Making car rental reservations	0.9	1.1	2.8	1.8	1.0	5.0	1.5
Other	0.7	1.0	0.6	1.0	0.4	0.0	0.8
Choosing an airline	0.0	0.5	0.4	1.7	1.6	0.5	0.7
Making airline reservations	0.1	0.7	0.2	0.6	0.7	0.3	0.4

Table 7 summarizes functions served by guidebooks for six MMAs. About half of European and Japanese visitors used guide books in their trip planning. Visitors from other markets used guide book to a lesser extent. Overall, most of the visitors who used guidebooks did so to help find restaurants, plan activities, find places to shop and access maps and directions.

Table 8. *Functions of Mobile Apps for All MMAs.*

	US- West	US- East	Canada	Japan	Europe	Oceania	All MMAs
Checking weather	83.2	82.2	65.7	74.9	82.6	76.6	80.2
Accessing maps and directions, GPS	77.3	67.4	54.9	55.5	50.0	54.8	69.5
Finding restaurants	45.6	40.6	37.9	36.5	40.0	29.1	42.1
Airport check-in	30.1	32.4	7.2	27.4	19.5	29.6	27.7
Finding places to shop	28.4	22.2	39.7	20.6	22.7	20.4	27.2
Planning activities	15.1	17.5	9.6	16.1	16.4	11.4	15.1
Purchasing tour or attraction packages	8.8	7.8	5.5	9.8	12.1	8.1	8.3
Making car rental reservations	4.6	4.5	1.8	4.2	8.5	3.3	4.3
Making hotel/lodging reservations	3.9	5.6	2.2	3.8	7.5	3.1	4.2
Deciding on vacation destination	2.7	3.5	8.2	5.5	4.7	4.6	3.8
Choosing an airline	3.7	3.7	3.4	2.4	6.5	1.5	3.6
Estimating costs of trip	3.0	2.8	4.6	3.7	5.6	4.0	3.3
Making airline reservations	2.9	4.3	2.0	3.6	5.8	1.3	3.2
Other	0.2	0.5	0.7	1.0	0.5	0.0	0.4

Table 8 summarizes functions served by mobile apps for six MMAs. Mobile apps were used by about 20 percent of 2013 visitors for any function related to their trips. Across all six MMAs about, of those visitors who indicated using mobile apps, their primary functions were to check the weather and access maps.



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