



Third Quarter 2016

Visitor Satisfaction
Monitoring Report

HAWAII TOURISM
AUTHORITY

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INTRODUCTION

This quarterly monitoring report presents selected preliminary statistics from the third quarter of the 2016 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., 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 third quarter (July – September) of 2016 rose 3.3 percent, compared to the third quarter of 2015, to 2,270,033 visitors.

Arrivals increased from U.S. West (+4.5% to 945,242 visitors), U.S. East (+5.6% to 464,620), Oceania (+2.1% to 120,728) and Korea (+21.2% to 54,619), but declined from Japan (-1.8% to 413,434), Canada (-2.2% to 73,343) and China (-4% to 46,359). Arrivals from Europe (+0.5% to 50,847) were comparable to third quarter 2015. The average length of stay for all visitors to the state was 8.86 days similar to third quarter of 2015 (8.88 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				2016P		
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
U.S. West	82	82	82	81	82	84	83	87	89	89	88
U.S. East	82	85	84	84	88	89	85	90	91	90	90
Japan	63	69	74	69	69	70	72	67	75	77	78
Canada	80	84	86	86	83	84	82	85	88	88	89
Europe	77	82	91	85	88	88	89	87	91	86	91
Oceania	77	79	79	73	83	77	74	75	80	81	81
China									76	64	76
Korea									78	82	73

P=Preliminary

- In the third quarter of 2016, close to 90 percent of U.S. West, U.S. East, Canadian and European respondents, and nearly 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 in the last 11 quarters.
- Excellent ratings by respondents from Oceania (+7 points), Canada (+7 points), Japan (+6 points), U.S. East (+5 points) and U.S. West (+5 points) increased compared to third quarter 2015.
- In third quarter 2016, 76 percent of Chinese respondents and 73 percent of Korean respondents gave excellent ratings to their time in Hawai'i.

Exceeded Expectations

Visitors' satisfaction is largely influenced by the level of service they received and by visitors' own needs, interests, and expectations. Therefore, it is important to measure how well the destination is able to provide the expected experience. Overall, scores on the "exceeding expectations" satisfaction indicator tended to be lower than typical scores for other satisfaction indicators.

In third quarter 2016, very few respondents from U.S. West (3%), U.S. East (3%), Japan (2%), Canada (2%), Europe (2%) and Oceania (4%) said that Hawai'i "did not meet their expectations at all". A slightly higher percentage of Chinese (6%) and Korean (5%) respondents felt this way.

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

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

P=Preliminary

- Over half of U.S. East respondents (56%) who visited Hawai‘i in third quarter 2016 said the trip exceeded their expectations, this was a 9-point improvement compared to third quarter 2015.
- Ratings by respondents from Canada (+8 points to 51%), Oceania (+8 points to 39%) and U.S. West (+5 points to 42%) also increased from last year.
- More than half of Korean respondents in third quarter 2016 said Hawai‘i exceeded their expectations.
- Chinese visitors were more critical about Hawai‘i than other visitor groups. Only 9 percent of respondents in third quarter 2016 felt that Hawai‘i “exceed” their expectations, while 85 percent felt that the trip “met” their expectations.

Very Likely to Recommend Hawai‘i

Visitors who are highly 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 be “very likely to recommend” Hawai‘i to others.

In third quarter 2016, only a small percentage of respondents from U.S. West (1%), U.S. East (1%), Japan (1%), Canada (1%), Europe (2%), Oceania (3%) and Korea (2%) said that they were “not too likely” or “not at all likely” recommend Hawai‘i to their friends and relatives. Chinese respondents were harder to please, as 9 percent said they would “not too likely” or “not at all likely” recommend Hawai‘i.

- U.S. and Canadian respondents continued to show the highest overall willingness to recommend Hawai‘i (about 90%). These ratings have changed very little over the last few years.
- Respondents from Oceania and Europe provided mid-range ratings of willingness to recommend (80%+). Ratings by European visitors rose by 4 points compared to third quarter 2015. Ratings by Oceania respondents were similar to a year ago.

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

P=Preliminary

- Japanese visitors' ratings over the last 11 quarters have been hovering near 80 percent. Ratings for third quarter 2016 were comparable to third quarter 2015.
- In third quarter 2016, 83 percent of Korean respondents and 72 percent of Chinese respondents would very likely recommend Hawai'i to their friends and relatives.

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

P=Preliminary

- U.S. West respondents continued to show the highest overall willingness to revisit Hawai'i (about 80%). Ratings for third quarter 2016 were consistent with a year ago.
- In third quarter 2016, close to 60 percent of respondents from Oceania (+12 points), Canada (+8 points), U.S. East (+7 points) and Japan (+5 points) said they would revisit Hawai'i. These ratings were higher compared to third quarter 2015.

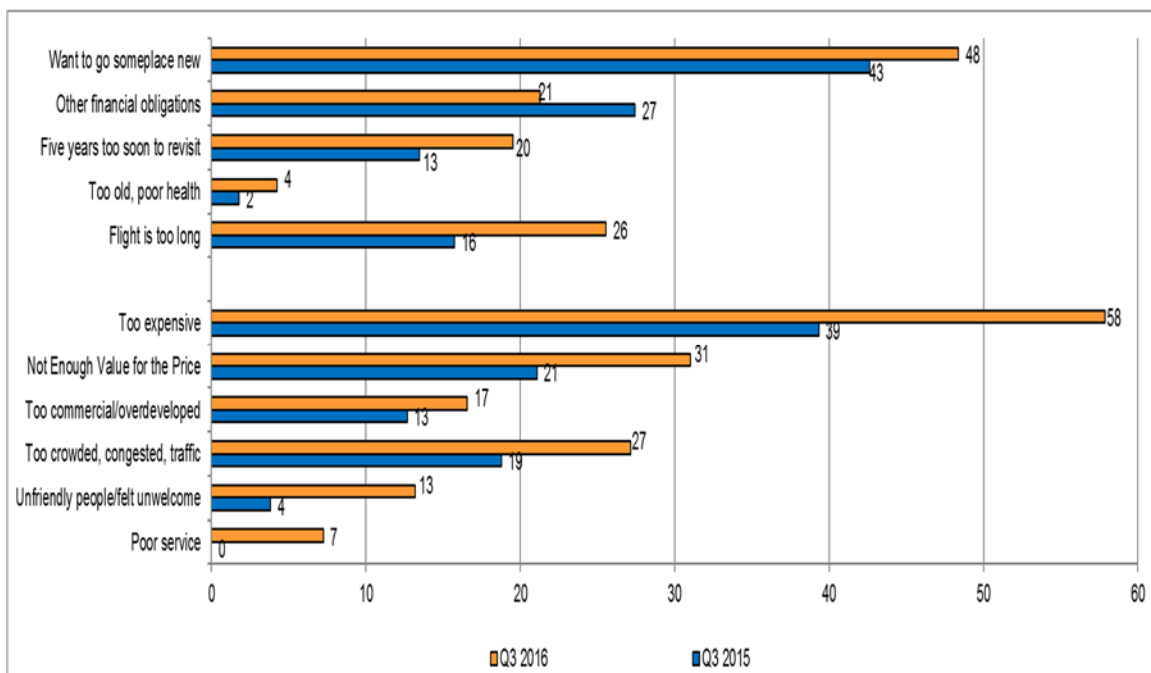
- With the long distance and no direct flights to Hawai'i, European visitors continued to show the lowest percentage of likelihood to return. In third quarter 2016, their rating improved slightly (+4 points) to 42 percent.
- Eight out of ten Korean respondents and 52 percent of Chinese respondents in third quarter 2016 said that they would come back to Hawai'i in the next five years.

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.”

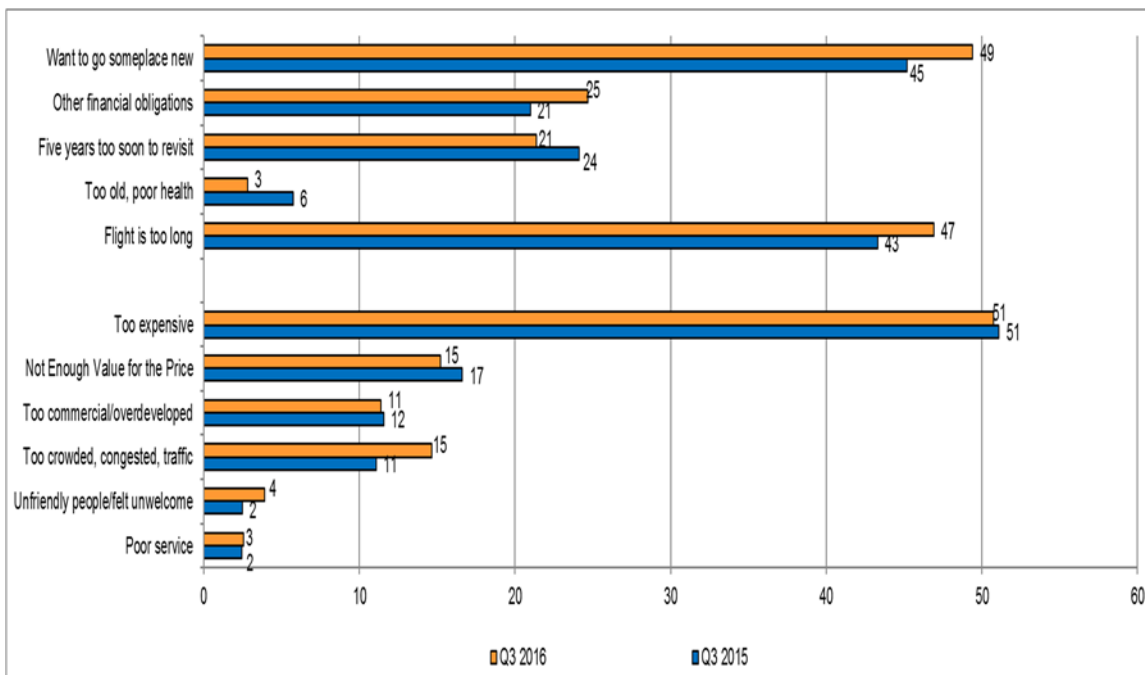
**Figure 1: U.S. West Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of U.S. West Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among U.S. West respondents in third quarter 2016, 48 percent said they would not likely return because they want to go someplace new, up 5 points from a year ago. More respondents also said that the flight is too long (+10 points to 26%) and that five years is too soon to revisit (+7 points to 20%).

The high cost was the primary performance issue among 58 percent of U.S. West respondents, up significantly from third quarter 2015 (39%). More visitors also said that there is not enough value for the price (+10 points to 31%), Hawai'i is too crowded/congested (+8 points to 27%), and that they encountered unfriendly people/felt unwelcome (+9 points to 13%) compared to a year ago.

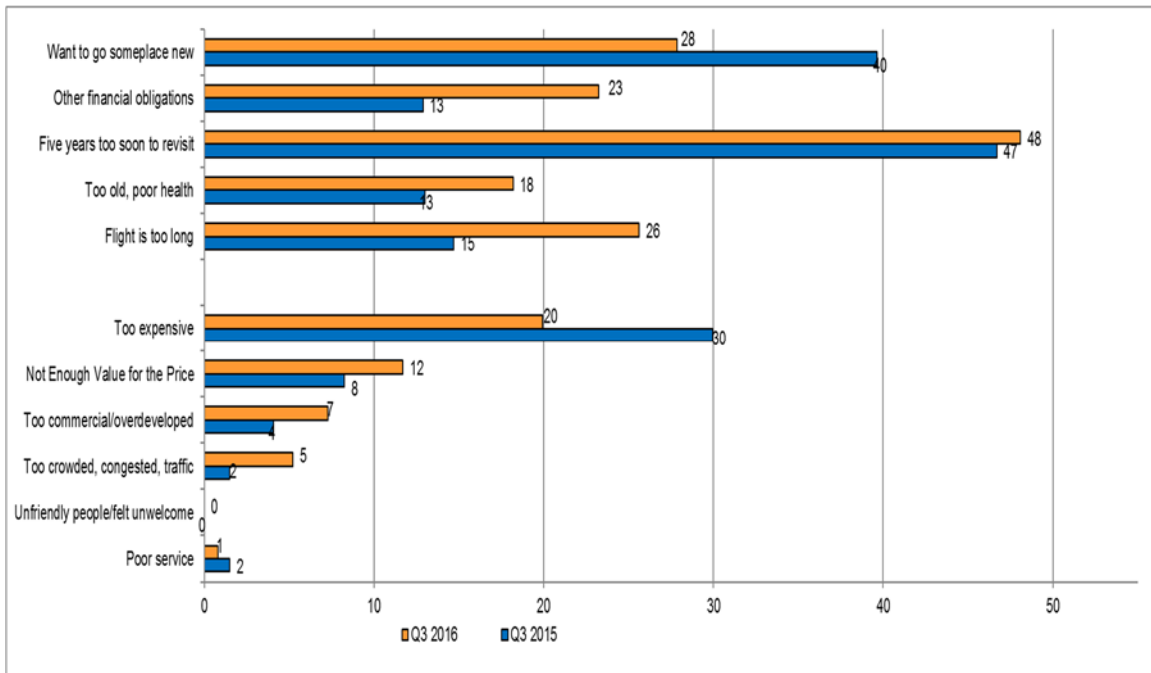
**Figure 2: U.S. East Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of U.S. East Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



In third quarter 2016, the desire to go someplace new (+4 points 49%) and the long flight (+4 points 47%) continued to be barriers for U.S. East visitors to return to Hawai'i.

The high cost (51%) continued to be the primary issue for many U.S. East visitors. Other reasons provided were not enough value for the price (15%), Hawai'i is too crowded/congested (15%), and too commercial/developed (11%).

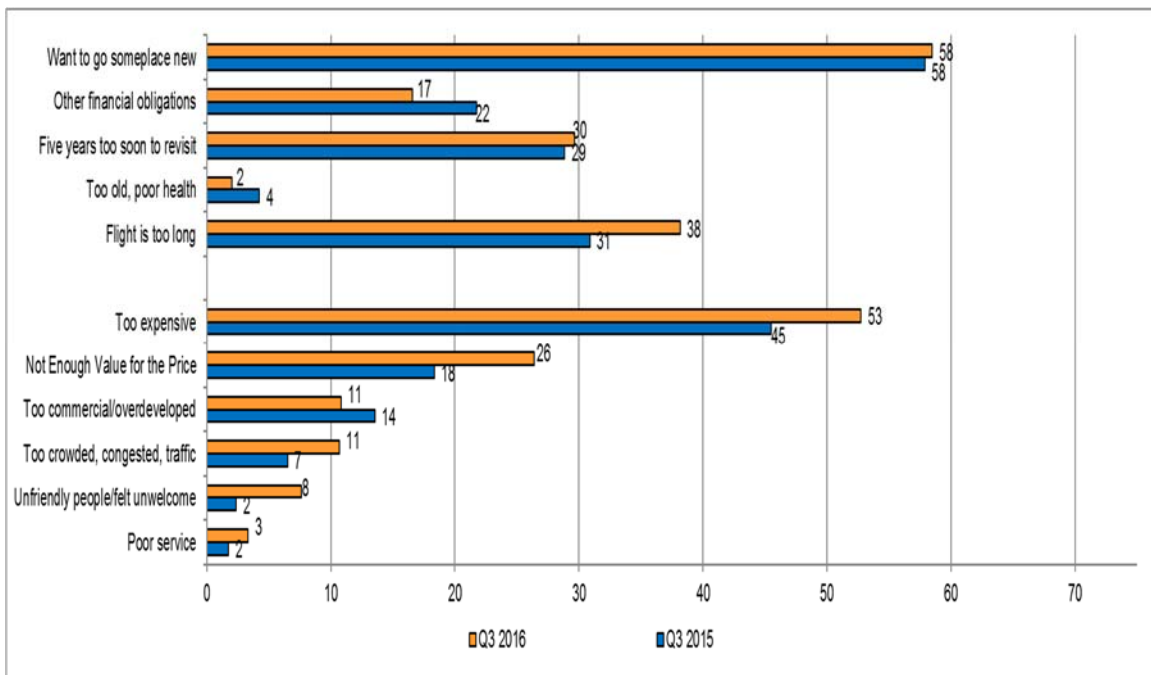
**Figure 3: Japanese Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of Japanese Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Japanese respondents in third quarter 2016 continued to cite more barriers than performance-related issues as reasons for not returning. About half of the respondents said that five years is too soon to revisit (48%). More respondents cited the long flight (+11 points to 26%) or have other financial obligations (+10 points 23%), but fewer said they want to go someplace new (-12 points to 28%) compared to third quarter 2015.

The high cost remained the primary performance issue for Japanese respondents, though not as dominant a concern as it was for visitors from other markets. Fewer Japanese respondents in third quarter 2016 said Hawai'i is too expensive (-10 points to 20%), but more felt that there was not enough value for the price they paid (+4 points to 12%) compared to the same period last year.

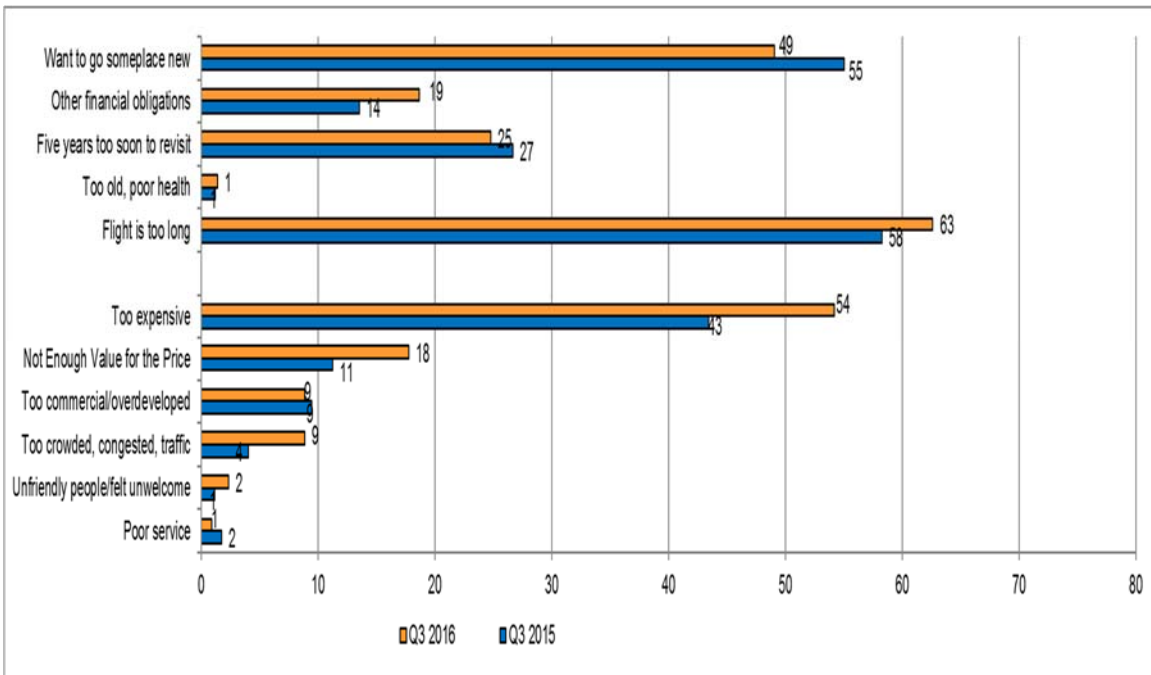
**Figure 4: Canadian Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of Canadian Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Canadian respondents in the third quarter of 2016, the desire to go someplace new (58%) continued to be the main barrier to revisiting Hawai'i. Other reasons for not returning were the long flight (+7 points to 38%) and five years is too soon to revisit (30%).

The primary performance-related issue continued to be the high cost (53%), which increased 8 points from third quarter 2015. More respondents also felt that there is not enough value for the price they paid (+8 points to 26%).

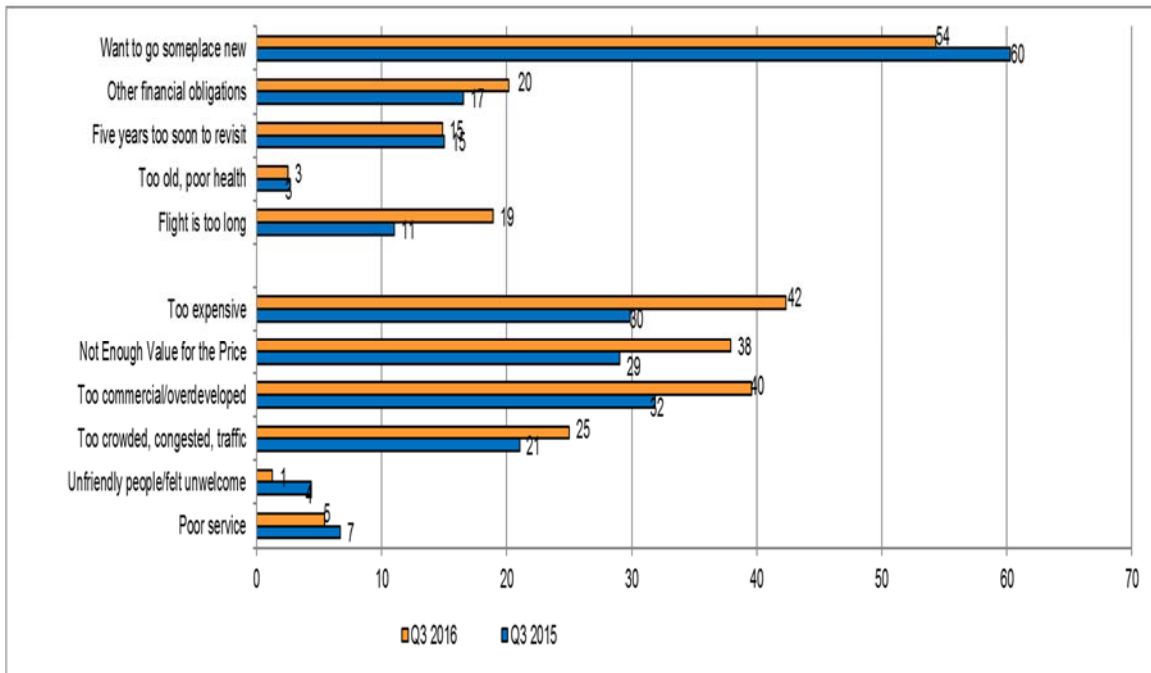
**Figure 5: European Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of European Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



For European respondents, the long flight (+5 points to 63%) continued to be the main barrier to revisiting the islands. About half of the respondents cited the desire to go someplace new (-6 points to 49%), while some said that five years is too soon to revisit (25%).

The high cost has become an increasing concern, cited by over half of European respondents (+11 points to 54%) in third quarter 2016 as a reason for not revisiting. More respondents also felt that there is not enough value for the price they paid (+7 points to 18%) compared to third quarter 2015.

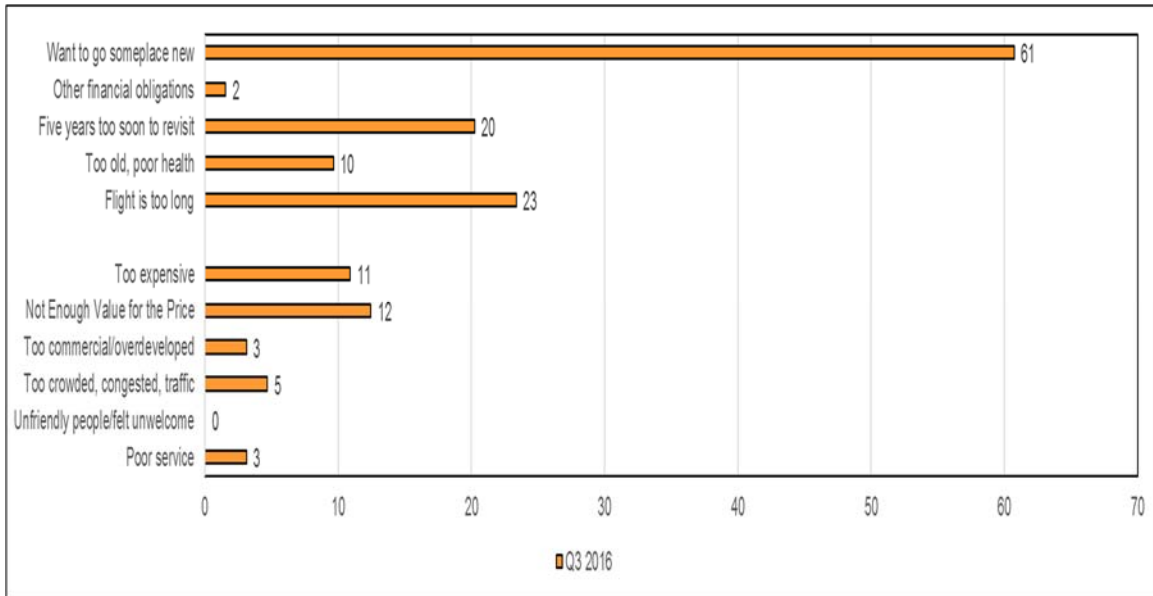
**Figure 6: Oceania Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of Oceania Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Oceania visitors in third quarter 2016, the most cited barrier to revisiting Hawai'i continued to be the desire to go someplace new (54%), however this was down from third quarter 2015 (60%). More visitors said the flight is too long (+8 points to 19%).

In terms of performance-related issues, significantly more Oceania respondents said that they will not be returning because Hawai'i is too expensive (+12 points to 42%), there is not enough value for the price they paid (+9 points to 38%), and Hawai'i is too commercial/overdeveloped (+8% to 40%) compared to third quarter 2015.

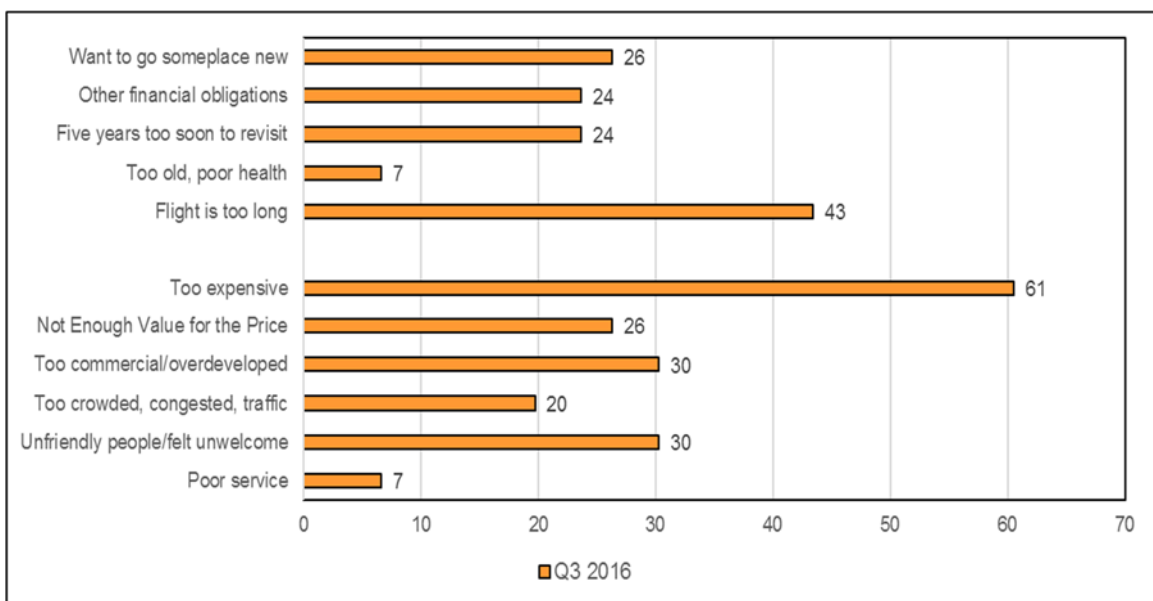
**Figure 7: Chinese Visitors' Reasons for Not Revisiting Hawai'i
(Percentage of Chinese Respondents not Likely to Revisit Hawai'i in the Next Five Years)**



Among Chinese respondents in third quarter 2016, the desire to go someplace new (61%) was the main barrier to revisiting Hawai'i. The flight is too long (23%) and five years is too soon to revisit (20%) were other reasons provided.

Not enough value for the price they paid (12%) and the high cost (11%) were less concerning for Chinese respondents compared to respondents from other visitor groups.

**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 third quarter 2016, the high cost (61%) was the most prevalent performance-related issue. Three out of ten respondents said Hawai'i is too commercial/over developed (30%), have unfriendly people/felt unwelcome (30%) and there is not enough value for the price they paid (26%).

The most mentioned barrier to returning was the long flight (43%), followed by the desire to go someplace new (26%), other financial obligations (24%), and five years is too soon to revisit (24%).

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.

Beginning with the 2016 VSAT survey, response options for satisfaction by island were changed from a 4-point scale to an 8-point scale. The intent was to increase the variance in the measure to enable more detailed analysis going forward. While the new scale did increase the variance, it did not maintain series continuity and so 2016 data will not be comparable to previous years. 2016 percentages shown Tables 12 through 18 are the sum of responses 7 and 8, divided by the total responses.

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

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

P=Preliminary

Most U.S. West visitors in third quarter 2016 gave excellent ratings to the island they visited. Kaua'i and Maui continued to score higher than O'ahu and the island of Hawai'i.

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

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

P=Preliminary

Close to 90 percent of U.S. East respondents who visited Kaua'i and Maui in third quarter 2016 rated their experience as excellent. The island of Hawai'i received excellent ratings from 84 percent of the respondents, while 77 percent gave excellent marks to O'ahu.

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

Island	2014				2015				2016P		
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
O'ahu	52	53	62	56	61	56	57	54	73	77	77

P=Preliminary.

Ratings for the island of Hawai'i, Maui and Kaua'i were not reported due to small sample sizes.

Eight out of ten Japanese respondents who visited O'ahu in third quarter 2016 rated their experience as excellent.

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

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

P=Preliminary.

A larger percentage of Canadian respondents in third quarter 2016 continued to give excellent ratings to Kaua'i and Maui compared to O'ahu and the island of Hawai'i.

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

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

P=Preliminary.

In third quarter 2016, European respondents continued to rate Kaua'i the highest among the islands. Maui received the next largest percent of excellent ratings, followed by the island of Hawai'i and O'ahu.

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

Island	2014				2015				2016		
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016
O'ahu	52	50	52	50	61	56	53	52	76	78	77

P=Preliminary.

Ratings for the island of Hawai'i, Maui and Kaua'i were not reported due to small sample sizes.

Nearly 80 percent of Oceania visitors in third quarter 2016 rated their experience on O'ahu as excellent.

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

Island	China			Korea		
	Q1 2016	Q2 2016	Q3 2016	Q1 2016	Q2 2016	Q3 2016
O'ahu	80	72	79	80	82	73

* Ratings for the island of Hawai'i, Maui and Kaua'i were not reported due to small sample sizes.

In third quarter 2016, 79 percent of Chinese respondents and 73 percent of Korean respondents gave excellent ratings to their visit to O'ahu.

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 third 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 12: Trip Decision Making - U.S. West
(Percent of U.S. West visitors for each response, 3rd Quarter 2016)**

	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%	18.9%	12.2%	28.5%	29.8%	5.9%	N/A
Decide to visit Hawai'i	5.7%	17.3%	13.0%	28.2%	29.9%	6.0%	N/A
Decide which island to visit	3.3%	14.1%	14.7%	28.4%	33.2%	6.4%	10.5%
Travel dates	1.3%	11.0%	13.9%	27.9%	39.0%	6.9%	11.7%
Accommodations- where to stay	1.9%	9.4%	12.6%	29.0%	37.9%	9.2%	11.5%
Airline reservations	0.1%	3.7%	9.1%	32.8%	46.1%	8.2%	11.3%
Purchase airline tickets	0.0%	3.1%	8.9%	32.4%	47.4%	8.2%	11.6%
Accommodation- reservations	0.7%	8.5%	11.6%	27.0%	42.8%	9.3%	11.8%
Rental car reservations	0.0%	2.5%	5.7%	21.4%	56.5%	13.9%	14.7%
Purchase tour/ attraction package	0.0%	0.4%	2.7%	11.2%	64.8%	20.9%	53.6%

A third of U.S. West respondents made the decision to take a vacation (35.8%) and to choose Hawai'i as a vacation destination (35.9%) at least seven months before their trip. Actual reservations and ticket purchases took place closer to the date of travel. More than half of the U.S. West visitors made their airline (54.3%) and accommodation (52.1%) reservations and nearly 70 percent made rental car reservations within 3 months before their trips to Hawai'i. Close to 65 percent purchased tour or attraction packages one to three months out, but 20.9 percent waited until less than one month before arrival. Additionally, 53.6 percent purchased packaged tours during their trip.

Table 13: Trip Decision Making - U.S. East
(Percent of U.S. East visitors for each response, 3rd Quarter 2016)

	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	4.9%	23.6%	13.5%	27.6%	25.9%	4.5%	N/A
Decide to visit Hawai'i	5.7%	19.8%	14.3%	29.3%	25.0%	5.9%	N/A
Decide which island to visit	3.5%	16.0%	13.3%	31.5%	29.9%	5.8%	11.5%
Travel dates	2.1%	13.1%	14.6%	30.9%	33.8%	5.4%	8.0%
Accommodations- where to stay	1.8%	11.4%	12.5%	30.7%	35.0%	8.5%	9.9%
Airline reservations	0.2%	6.0%	11.0%	32.2%	42.4%	8.1%	9.2%
Purchase airline tickets	0.1%	5.7%	10.7%	32.7%	42.4%	8.5%	9.9%
Accommodation- reservations	1.6%	9.2%	12.2%	30.1%	37.9%	9.2%	9.7%
Rental car reservations	0.0%	3.6%	5.9%	25.2%	53.7%	11.6%	13.2%
Purchase tour/ attraction package	0.3%	1.8%	4.0%	15.9%	63.7%	14.2%	59.0%

Compared to their U.S. West counterparts, a larger percentage of U.S. East visitors in third quarter 2016 took at least seven months before their trip to decide on a vacation (42%) and to visit Hawai'i (39.8%). Half of the respondents made their airline reservations (50.5%), purchased their airline tickets (50.8%) and made their lodging reservations (47.1%) within 3 months before their trip. The majority of U.S. East respondents waited three months prior to departure to make car reservations (65.3%) and purchase tour packages (78%). Over half of the respondents purchased packaged tours (59%) while their trip was in progress.

Table 14: Trip Decision Making - Japan
(Percent of Japanese visitors for each response, 3rd Quarter 2016)

	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	1.8%	15.7%	7.6%	33.2%	38.0%	3.5%	N/A
Decide to visit Hawai'i	2.1%	14.9%	8.6%	33.5%	37.3%	3.5%	N/A
Decide which island to visit	1.8%	13.5%	8.2%	33.0%	39.9%	3.6%	10.3%
Travel dates	0.9%	11.2%	8.0%	31.6%	42.7%	5.6%	19.5%
Accommodations- where to stay	0.1%	7.1%	7.2%	31.6%	48.8%	5.1%	6.7%
Airline reservations	0.7%	9.1%	6.9%	31.9%	46.1%	5.3%	8.7%
Purchase airline tickets	0.3%	7.3%	6.8%	28.2%	51.6%	5.7%	7.7%
Accommodation- reservations	0.4%	9.5%	6.9%	30.3%	47.2%	5.7%	9.5%
Rental car reservations	0.5%	2.3%	4.5%	17.4%	57.3%	18.1%	8.9%
Purchase tour/ attraction package	0.8%	0.5%	2.0%	11.3%	71.4%	14.1%	46.6%

Japanese visitors in third quarter 2016 continued to have a relatively short planning and booking window. Three months or less before their arrival, 41.6 percent of the respondents decided to take a vacation, 40.8 percent decided to visit Hawai'i and 43.5 percent decided on the islands they wanted to visit. Within three months of their trip, over half of the respondents made airline reservations (51.5%), purchased airline tickets (57.3%), and made accommodation reservations (53%). Also within three months before arriving in Hawai'i, the majority of the respondents made rental car reservations (75.4%) and purchased tour and attraction packages (85.4%). Nearly half of the respondents also purchased tour packages during their trip.

Table 15: Trip Decision Making - Canada
(Percent of Canadian visitors for each response, 3rd Quarter 2016)

	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%	18.0%	8.6%	30.7%	33.0%	4.9%	N/A
Decide to visit Hawai'i	4.3%	14.9%	8.3%	28.2%	38.2%	6.1%	N/A
Decide which island to visit	3.6%	11.9%	8.1%	29.4%	40.1%	6.9%	10.6%
Travel dates	2.6%	10.1%	10.5%	29.5%	40.3%	7.1%	8.0%
Accommodations- where to stay	2.4%	7.6%	9.1%	25.5%	47.7%	7.8%	7.8%
Airline reservations	0.0%	4.8%	8.4%	27.6%	51.3%	7.9%	10.6%
Purchase airline tickets	0.0%	4.3%	8.1%	27.3%	52.4%	7.9%	8.4%
Accommodation- reservations	2.1%	7.2%	8.4%	24.0%	49.2%	9.1%	8.7%
Rental car reservations	0.0%	2.1%	5.3%	16.7%	62.4%	13.5%	17.8%
Purchase tour/ attraction package	0.0%	1.5%	3.0%	8.8%	64.1%	22.6%	60.9%

The majority of Canadian respondents in third quarter 2016 took between one to six months prior to their trip to decide on a vacation (63.7%), decide to visit Hawai'i (66.4%) and decide on which islands to visit (69.5%). Over half of the respondents purchased airline tickets (60.4%) and reserved accommodations (58.3%) within three months before arrival. The majority made car reservations (75.9%) and purchased tour packages (86.7%) in the last three months before their trip. Six out of ten respondents purchased tour packages while their trip is in progress.

Table 16: Trip Decision Making - Europe
(Percent of European visitors for each response, 3rd Quarter 2016)

	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	7.6%	27.3%	18.5%	29.8%	14.4%	2.5%	N/A
Decide to visit Hawai'i	7.4%	23.8%	19.4%	32.1%	15.3%	2.1%	N/A
Decide which island to visit	3.4%	19.4%	20.9%	33.5%	19.4%	3.4%	11.4%
Travel dates	3.9%	18.9%	19.9%	35.3%	19.0%	3.0%	8.1%
Accommodations- where to stay	2.4%	15.5%	17.1%	35.5%	26.4%	3.2%	6.8%
Airline reservations	1.2%	14.5%	19.5%	36.3%	25.1%	3.4%	11.8%
Purchase airline tickets	1.1%	13.7%	19.8%	35.9%	26.3%	3.2%	7.5%
Accommodation- reservations	1.8%	13.3%	17.4%	33.3%	30.4%	3.7%	7.9%
Rental car reservations	0.2%	6.0%	13.3%	27.1%	42.6%	10.8%	18.6%
Purchase tour/ attraction package	0.5%	4.7%	6.7%	30.1%	49.2%	8.8%	60.6%

Half of the European respondents took at least seven months to decide to take a vacation (53.3%) and to pick Hawai'i as the destination (50.5%). A third of the respondents made their airline reservations (28.5%), purchased airlines tickets (29.5%) and made their lodging reservations (34.1%) within three months prior to arriving. Over half of the respondents made car reservations (53.3%) and purchased tour packages (58%) within three months before their arrival date. The majority purchased tour and attraction packages during their trip (60.6%).

**Table 17: Trip Decision Making - Oceania
(Percent of Oceania visitors for each response, 3rd Quarter 2016)**

	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	9.0%	28.4%	17.1%	26.7%	17.3%	1.5%	N/A
Decide to visit Hawai'i	6.7%	25.5%	16.1%	31.9%	18.0%	1.9%	N/A
Decide which island to visit	4.5%	23.3%	18.0%	32.4%	19.4%	2.3%	10.8%
Travel dates	3.8%	21.2%	19.3%	33.0%	20.2%	2.3%	10.3%
Accommodations- where to stay	1.6%	13.4%	16.7%	32.6%	31.5%	4.1%	7.3%
Airline reservations	1.6%	15.3%	19.9%	35.5%	25.3%	2.5%	10.2%
Purchase airline tickets	1.3%	14.5%	19.8%	35.3%	26.3%	2.8%	9.1%
Accommodation- reservations	0.9%	10.1%	18.2%	33.8%	33.0%	3.9%	7.8%
Rental car reservations	0.8%	6.3%	10.4%	23.6%	47.2%	11.7%	18.0%
Purchase tour/ attraction package	1.4%	7.2%	8.4%	22.6%	47.7%	12.8%	66.2%

Oceania visitors also planned early. About half of the respondents decided to take a vacation (54.5%) and decided to visit Hawai'i (48.3%) at least seven months before arrival. The majority made airlines reservations (60.8%), purchased tickets (61.6%), made accommodation reservations (66.8%), reserved rental cars (70.8%) and purchased tour/attraction packages (70.2%) between one to six months of arrival. Many also purchased tour and attraction packages (66.2%) during their trip.

**Table 18: Trip Decision Making - China
(Percent of Chinese visitors for each response, 3rd Quarter 2016)**

	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	0.0%	1.7%	5.0%	37.4%	48.9%	7.0%	N/A
Decide to visit Hawai'i	1.8%	1.1%	4.5%	30.5%	59.7%	2.3%	N/A
Decide which island to visit	0.0%	0.0%	6.5%	34.2%	59.3%	0.0%	20.5%
Travel dates	0.0%	5.2%	4.3%	33.5%	56.1%	0.9%	56.0%
Accommodations- where to stay	0.0%	0.0%	0.0%	24.6%	71.1%	4.4%	9.8%
Airline reservations	0.0%	0.0%	0.0%	22.6%	67.9%	9.5%	6.8%
Purchase airline tickets	0.0%	0.0%	0.0%	28.4%	59.6%	11.9%	6.2%
Accommodation- reservations	0.0%	0.0%	0.0%	21.7%	68.9%	9.4%	13.6%
Rental car reservations	0.0%	0.0%	0.0%	15.4%	69.2%	15.4%	5.4%
Purchase tour/ attraction package	0.0%	0.0%	0.0%	0.0%	91.4%	8.6%	13.7%

Many Chinese respondents in third quarter 2016 made their travel decisions in a relatively short time. Between one to three months prior to arrival, over half of the respondents decided to visit Hawai'i (59.7%), decided on the islands they wanted to visit (59.3%) and set their travel dates (56.1%). The majority 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 19: Trip Decision Making - Korea
(Percent of Korean visitors for each response, 3rd Quarter 2016)

	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	0.0%	4.3%	3.3%	24.5%	44.9%	23.0%	N/A
Decide to visit Hawai'i	1.2%	6.6%	1.2%	23.2%	47.9%	19.8%	N/A
Decide which island to visit	0.0%	4.2%	5.8%	22.6%	46.9%	20.5%	28.8%
Travel dates	0.0%	5.0%	4.5%	24.4%	46.1%	20.0%	35.4%
Accommodations- where to stay	0.0%	0.8%	4.3%	19.8%	51.2%	24.0%	32.1%
Airline reservations	0.0%	4.6%	3.0%	28.9%	44.2%	19.3%	12.0%
Purchase airline tickets	0.0%	5.4%	3.2%	27.0%	45.9%	18.4%	29.4%
Accommodation- reservations	0.0%	0.9%	2.7%	20.8%	50.3%	25.3%	32.7%
Rental car reservations	0.0%	1.1%	1.1%	9.4%	53.0%	35.4%	22.6%
Purchase tour/ attraction package	0.0%	0.0%	5.5%	7.3%	42.9%	44.4%	28.7%

About half of Korean respondents in third quarter 2016 decided to visit Hawai'i (47.9%) and decided on the islands they wanted to visit (46.9%) between one to three months before their arrival. During this time period, half of the respondents also made accommodation reservations, made rental car reservations and purchased tour and attraction packages. A third of the respondents purchased tour and attraction packages during their trip.

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 third quarter 2016 .

U.S. West: While planning their trip to Hawai'i, U.S. West respondents in third quarter 2016 relied heavily on personal experience (58%) and recommendations from friends/relatives (51%). Other popular sources used were Information from airlines (36%), smartphones and tablets (35%), online travel booking sites/online travel agents (34%), online webpage or blog about Hawai'i (32%), and online social networking sites (29%).

While their trip is in progress, U.S. West visitors relied on their personal experience (45%), used smartphones or tablets (38%) and inquired hotels/resorts front desks/tour desks (35%) for information about Hawai'i.

**Table 20: Resources Used in Planning their Trip to Hawai'i – Third Quarter 2016
(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	21%	29%	57%	26%	49%	61%	61%	44%
	During	9%	12%	11%	11%	12%	9%	42%	8%
	After	2%	2%	2%	2%	2%	2%	16%	2%
	Not used	72%	65%	40%	65%	43%	34%	36%	51%
Information from airline/ commercial carriers	Before	36%	37%	22%	35%	35%	35%	12%	38%
	During	12%	12%	7%	11%	14%	8%	6%	3%
	After	2%	2%	2%	2%	1%	1%	2%	2%
	Not used	59%	60%	75%	60%	57%	61%	85%	59%
Hotel/Resort- front desk, concierge/ tour desk	Before	17%	19%	24%	17%	17%	12%	13%	31%
	During	35%	42%	27%	37%	43%	48%	8%	14%
	After	1%	1%	2%	2%	1%	1%	1%	1%
	Not used	53%	47%	56%	51%	45%	42%	82%	55%
Personal experience	Before	58%	48%	37%	48%	30%	41%	32%	27%
	During	45%	38%	10%	35%	26%	25%	22%	14%
	After	16%	14%	4%	13%	10%	8%	2%	4%
	Not used	33%	42%	59%	42%	56%	47%	66%	62%
Recommendations from Friends or relatives	Before	51%	52%	36%	55%	46%	51%	37%	37%
	During	26%	26%	8%	20%	15%	15%	14%	11%
	After	5%	5%	2%	4%	4%	3%	4%	4%
	Not used	42%	42%	61%	41%	47%	44%	61%	56%
Online travel booking site/ Online travel agent	Before	34%	31%	34%	47%	41%	39%	21%	36%
	During	6%	8%	4%	9%	12%	8%	8%	6%
	After	1%	1%	2%	2%	1%	1%	4%	1%
	Not used	64%	66%	64%	51%	55%	59%	76%	61%
Online webpage or blog covering Hawai'i	Before	32%	36%	44%	46%	45%	37%	16%	47%
	During	19%	22%	13%	27%	26%	16%	6%	24%
	After	3%	4%	11%	5%	5%	4%	2%	4%
	Not used	62%	58%	51%	47%	48%	57%	80%	47%
Online social networking site	Before	29%	32%	30%	36%	41%	33%	19%	59%
	During	19%	22%	12%	22%	28%	20%	7%	31%
	After	7%	7%	5%	6%	8%	6%	3%	8%
	Not used	65%	61%	67%	58%	50%	58%	78%	32%
Smartphone or tablet applications relevant to your trip	Before	35%	38%	38%	35%	34%	30%	20%	37%
	During	38%	42%	24%	38%	41%	32%	12%	26%
	After	7%	6%	6%	6%	5%	4%	2%	4%
	Not used	50%	48%	54%	50%	47%	54%	75%	49%
Hawai'i Visitors Bureaus website	Before	22%	27%	25%	33%	30%	21%	11%	15%
	During	10%	12%	5%	16%	15%	11%	4%	4%
	After	2%	2%	5%	4%	3%	3%	2%	2%
	Not used	74%	67%	72%	60%	62%	72%	86%	80%
Magazines	Before	11%	11%	55%	14%	15%	15%	6%	10%
	During	14%	13%	21%	19%	18%	10%	3%	5%
	After	3%	2%	7%	2%	3%	2%	1%	2%
	Not used	78%	79%	41%	71%	71%	78%	91%	83%
Television shopping channel/ television program	Before	4%	5%	32%	4%	6%	4%	2%	10%
	During	7%	7%	10%	7%	6%	6%	2%	2%
	After	1%	1%	10%	2%	1%	1%	0%	0%
	Not used	89%	88%	63%	88%	88%	89%	97%	88%
Guide books	Before	23%	28%	44%	34%	51%	18%	4%	22%
	During	26%	30%	23%	37%	40%	20%	3%	15%
	After	3%	3%	4%	4%	5%	1%	1%	2%
	Not used	64%	59%	50%	50%	40%	68%	93%	69%

U.S. East: Half of the U.S. East respondents in third quarter 2016 relied on recommendations from friends/relatives (52%) and personal experience (48%) in planning their trip. A third of these visitors also used smartphones and tablets (38%), information from airlines (37%), online webpage or blog about Hawai'i (36%), online social networking sites (32%), and online travel booking sites/online travel agents (31%).

During their trip, many U.S. East respondents asked for assistance from hotels/resorts front desks/tour desks (42%), used smartphones or tablets (42%) and relied on personal experience (38%).

Japan: Japanese respondents in third quarter 2016 relied heavily on travel agents (57%) and magazines (55%) in planning their Hawai'i trip. Guide books (44%), online webpage or blog about Hawai'i (44%), smartphones and tablets (38%), personal experience (37%), recommendations from friends/relatives (36%), and online travel booking sites (34%) were other resources used in trip planning.

While their trip was in progress, Japanese respondents sought help from hotels/resorts front desks/tour desks (27%), and used smartphones and tablets (24%), guide books (23%) and magazines (21%) to access information about Hawai'i.

Canada: Over half of the Canadian respondents who visited Hawai'i in third quarter 2016 sought recommendations from friends/relatives (55%) in planning their trip. Many respondents also used their personal experience (48%), online travel booking sites/online travel agents (47%), online webpage or blog about Hawai'i (46%), online social networking sites (36%), smartphones and tablets (35%), guide books (34%) and Hawai'i Visitor Bureau websites (33%).

During their trip, many Canadian respondents used smartphones or tablets (38%), information from hotels/resorts front desks/tour desks (37%), guide books (37%) and relied on their personal experience (35%).

Europe: Half of the European respondents in third quarter 2016 used guide books (51%) and travel agents (49%) to plan their trip to Hawai'i. Many also used recommendations from friends/relatives (46%), online webpage or blog about Hawai'i (45%), online travel booking site (41%) and online social networking sites (41%).

While their trip is in progress, many European respondents used information from hotels/resorts front desks/tour desks (43%), smartphones or tablets (41%) and guide books (40%).

Oceania: Respondents from Oceania primarily used travel agents (61%) in planning their trip to Hawai'i. Many also used recommendations from friends/relatives (51%), personal experience (41%), online travel booking site (39%) and online webpage or blog about Hawai'i (37%).

During their trip, many Oceania visitors received assistance from hotels/resorts front desks/tour desks (48%) and used smart phones and tablets (32%).

China: Many Chinese respondents in third quarter 2016 used travel agents (61%) in planning their trip to Hawai'i. Some also used recommendations from friends/relatives (37%), personal experience (32%), online travel booking site (21%), smartphones or tablets (20%) and online social networking sites (19%). During their trip, many Chinese respondents continued to rely on travel agents (42%) for information about Hawai'i.

Korea: Respondents from Korea in third quarter 2016 relied heavily on online social networking sites (59%) in planning their trip to Hawai'i. Online webpage or blog about Hawai'i (47%), travel agents (44%), information from airlines (38%), recommendations from friends/relatives (37%), smartphones or tablets (37%) and online travel booking sites (36%) were other popular tools in their trip planning.

While their trip was in progress, Korean respondents used online social networking sites (31%), smartphones or tablets (26%), and online webpage or blog about Hawai'i (24%).

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 21: Number of Surveys Collected
(Third Quarter 2016)**

MMA	Completed	Margin of Error
U.S West	1,004	3.09
U.S East	1,029	3.06
Canada	809	3.45
Japan	879	3.31
Europe	867	3.33
Oceania	624	3.92
Other Asia (China & Korea)	682	3.75
All MMAs	5,894	1.28

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 third quarter (July – September) of 2016, a total of 5,894 completed forms were received with a margin of error of ± 1.28 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 2016 data. The 2016 VSAT weighting system was developed to adjust for disproportionate sampling across MMAs.

For information, call the Hawai'i Tourism Authority (HTA) at (808) 973-2255 or email us at research@Hawai'itourismauthority.org