

Visitor Satisfaction Study

Q2 2020

Prepared for:
Hawai'i Tourism Authority

METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major market areas (MMAs) who recently completed a trip to Hawai'i. The sampled MMAs typically include: 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.

Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S. visitors were sent an email invitation with a link to complete the survey online.

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. Data from all MMAs were reported as weighted data based on weights generated for 2020 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

Note: Some results are presented with very small sample sizes that produce statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

METHODOLOGY – Effect of COVID-19

Starting on Thursday, March 26, 2020, the State of Hawai'i required all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine to prevent the spread of COVID-19. As a result, transpacific travel to the islands dropped by an average of 99% from a year earlier. COVID-19 led to considerable reduction of air service to Hawai'i from U.S. West and U.S. East and suspension of direct air service from Japan, Canada, Oceania, China and Korea.

Nearly all incoming visitors to the islands in Q2 2020 were from the U.S. Mainland. Therefore, the Visitor Satisfaction and Activity Survey was collected only among visitors from the U.S. West and U.S. East. When reviewing this data and comparing to prior periods, please note the comparatively small sample sizes and corresponding margins of error.

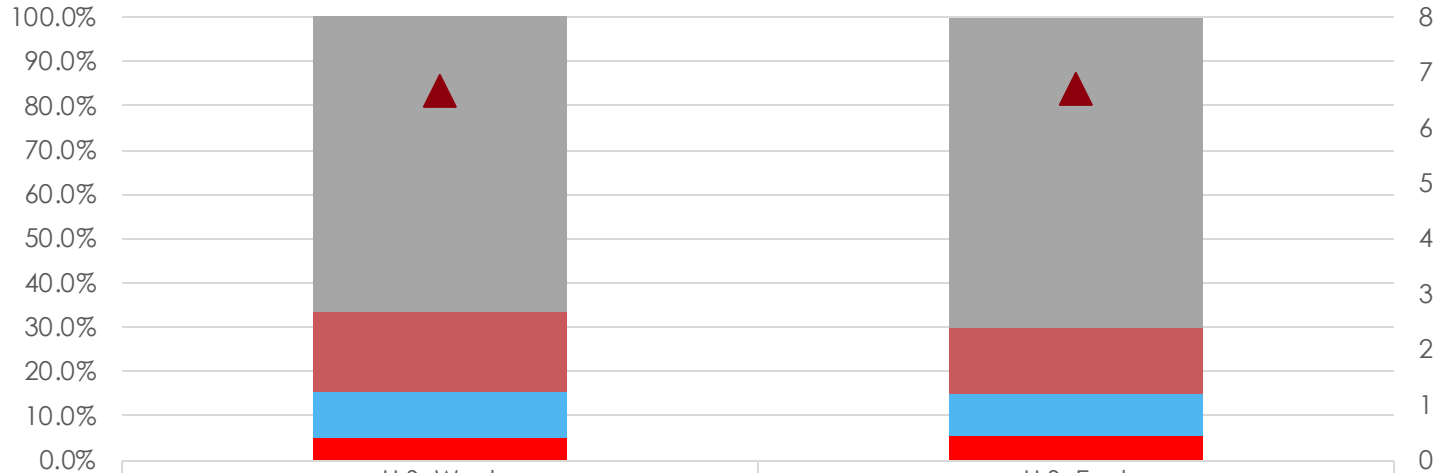
MMA	Completed	Margins of Error*	Response Rate
U.S. West	528	+/- 4.27%	12.50%
U.S. East	362	+/- 5.15%	11.68%
All MMAs	890	+/- 3.29%	12.15%

* Margins of error are presented at the 95 percent level of confidence.

SECTION – VISITOR SATISFACTION

SATISFACTION – STATE OF HAWAI‘I BY MMA

8-pt Rating Scale
8=Excellent / 1=Poor



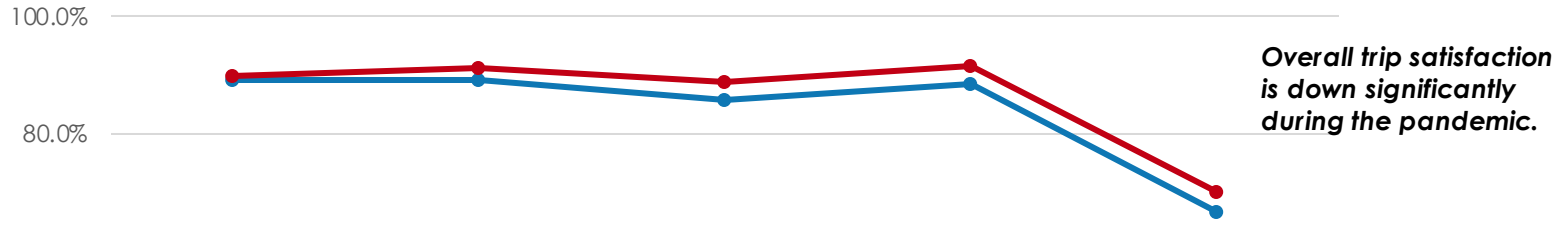
	U.S. West	U.S. East
■ Excellent (7-8)	66.7%	70.1%
■ Above Avg (5-6)	18.1%	14.8%
■ Below Avg (3-4)	10.5%	9.6%
■ Poor (1-2)	4.8%	5.5%
BASE	528	362
▲ MEAN	6.65	6.71

SATISFACTION – STATE OF HAWAI'I BY MMA

- **Household income:** Less affluent travelers from U.S. West or those with combined household incomes below \$100K were more satisfied overall with their trip compared to travelers from this visitor market in households with combined incomes in excess of \$100K.
- **Age:** Younger travelers from U.S. East or those under the age of 35, tended to be the most satisfied with their trip compared to older travelers from this market.
- **Gender:** Female travelers from both U.S. East and U.S. West gave higher satisfaction scores than males.

SATISFACTION – STATE OF HAWAI‘I BY MMA

Tracking Data – Rating of “Excellent” (7-8)

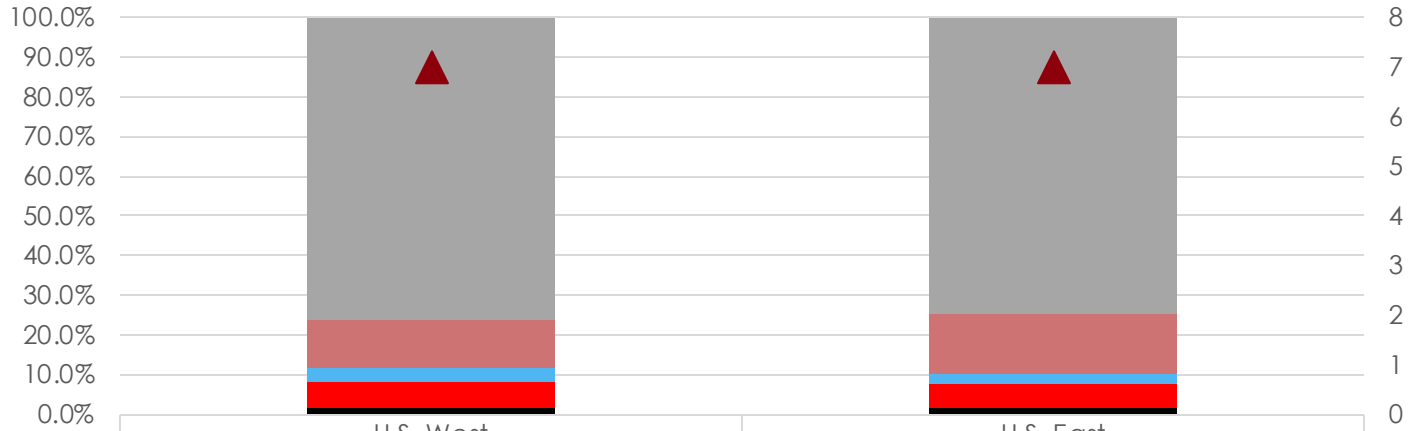


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P
U.S. West	89.1%	89.3%	85.8%	88.4%	66.7%
U.S. East	89.9%	91.2%	88.7%	91.4%	70.1%

P= Preliminary Data

BRAND/DESTINATION – ADVOCACY

8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



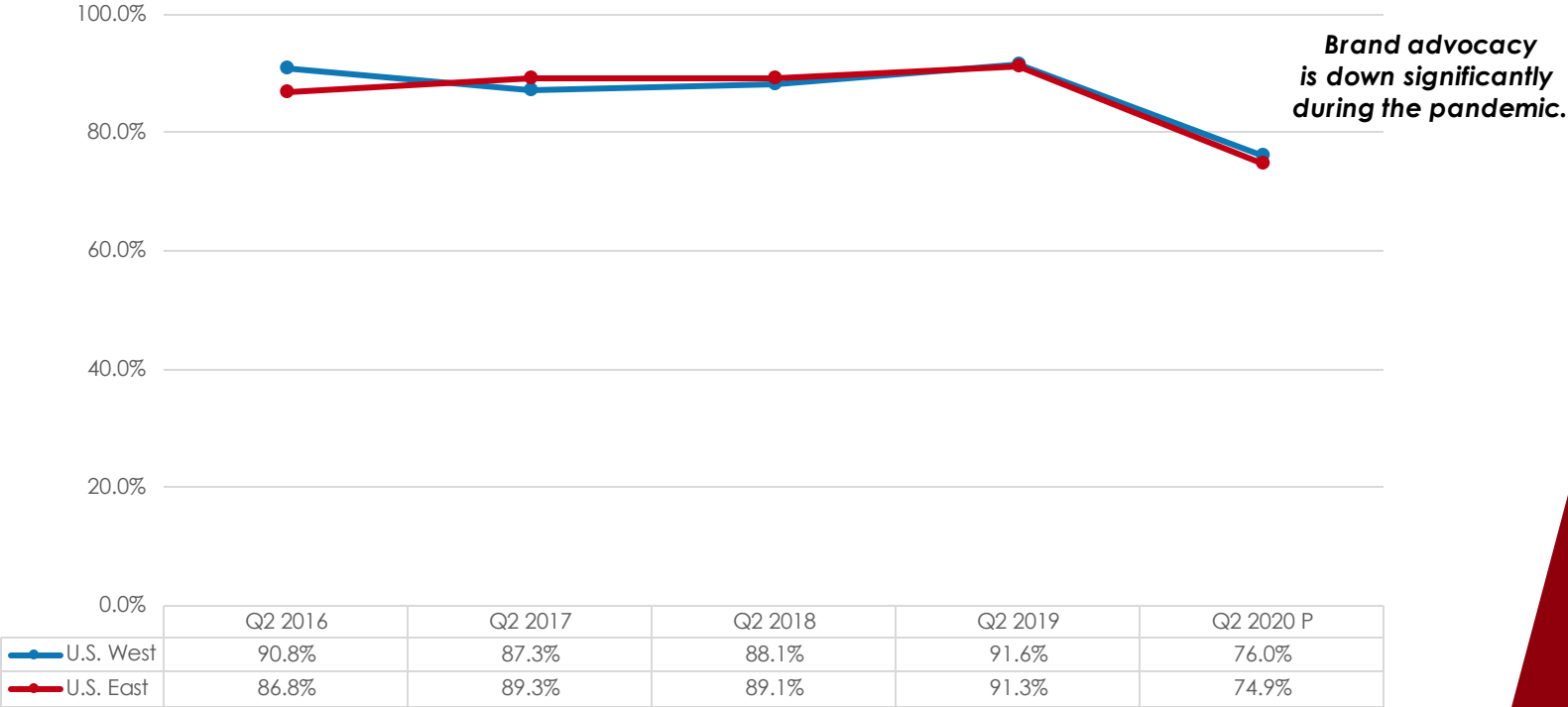
	U.S. West	U.S. East
■ Very likely (7-8)	76.0%	74.9%
■ Somewhat likely (5-6)	12.3%	15.0%
■ Somewhat unlikely (3-4)	3.5%	2.8%
■ Very unlikely (1-2)	6.3%	5.7%
■ Not Sure	1.8%	1.7%
BASE	528	362
▲ MEAN	7.01	7.00

BRAND/DESTINATION – ADVOCACY

- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend Hawai'i as a destination than their male counterparts.
- **Age:** Younger travelers under the age of 35 from both U.S. West and U.S. East were the most likely to recommend the state to others. Advocacy declined with age in both visitor markets.
- **Household income:** Less affluent travelers from U.S. West were more likely to recommend visiting Hawai'i than those with households earning in excess of \$100K.

BRAND/DESTINATION – ADVOCACY

TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



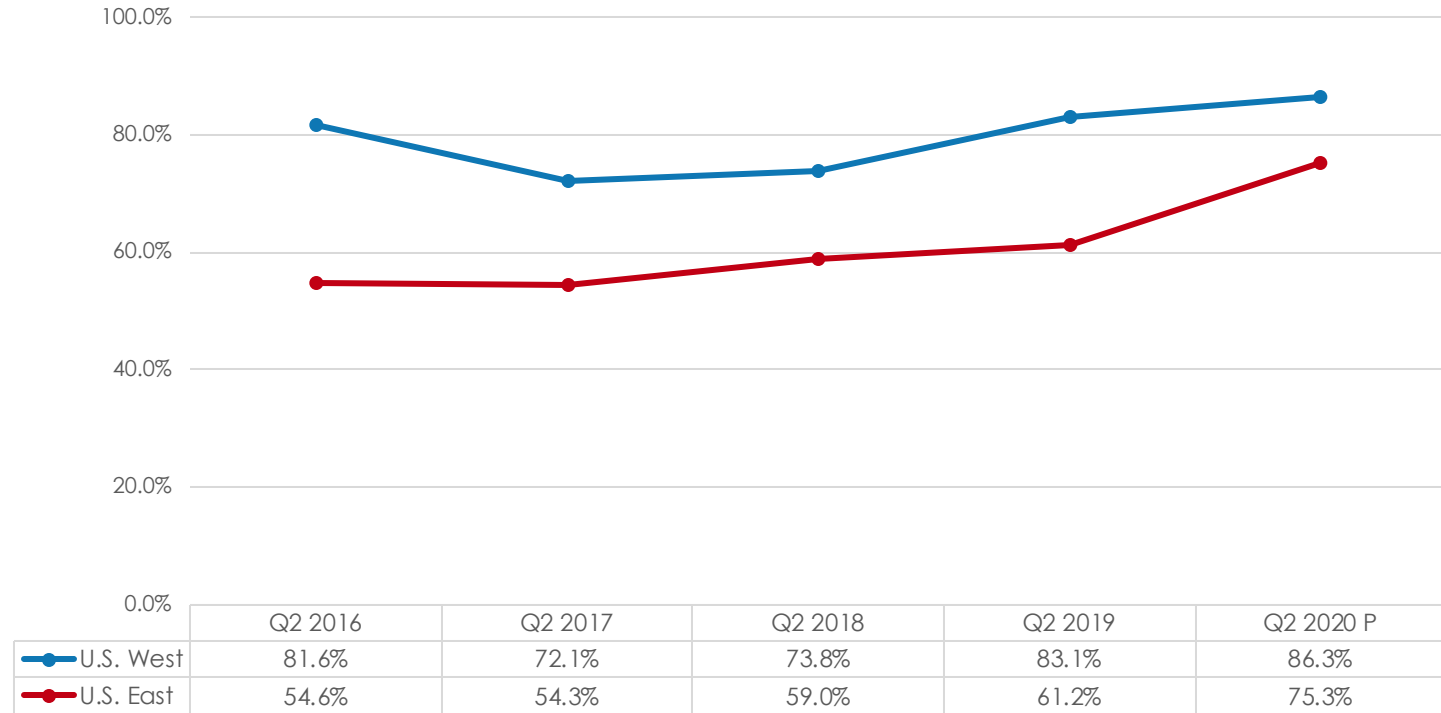
	U.S. West	U.S. East
■ Very likely (7-8)	86.3%	75.3%
■ Somewhat likely (5-6)	7.9%	15.8%
■ Somewhat unlikely (3-4)	2.3%	2.8%
■ Very unlikely (1-2)	2.3%	3.3%
■ Not Sure	1.2%	2.8%
BASE	528	362
▲ MEAN	7.50	7.16

LIKELIHOOD OF RETURN VISIT

- **First-time vs. Repeat:** Repeat visitors from U.S. West were more likely to return to the islands than first-time visitors from this market.
- **Gender:** Female visitors from both U.S. West and U.S. East were more likely to return to the state than their male counterparts.
- **Age:** Younger travelers (those under 35) from U.S. East were more likely to indicate the possibility of a return visit than older segments from this region.

LIKELIHOOD OF RETURN VISIT

TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q2 2019	Q2 2020 P
40.9% Too expensive	37.5% Unfriendly people/ Felt unwelcome
34.6% Want to go someplace new	36.5% COVID-19
24.0% Too crowded/ congested/ traffic	30.2% Too expensive
18.1% Poor value	19.8% No reason to return/ nothing new
17.5% Too commercialized/ overdeveloped	18.8% Poor value
17.3% Other financial obligations	14.6% Too crowded/ congested/ traffic
16.5% Five years is too soon	14.6% Poor service
11.6% Unfriendly ppl/ felt unwelcome	12.6% Too commercialized/ overdeveloped
10.1% Flight too long	10.4% Want to go someplace new

P= Preliminary Data

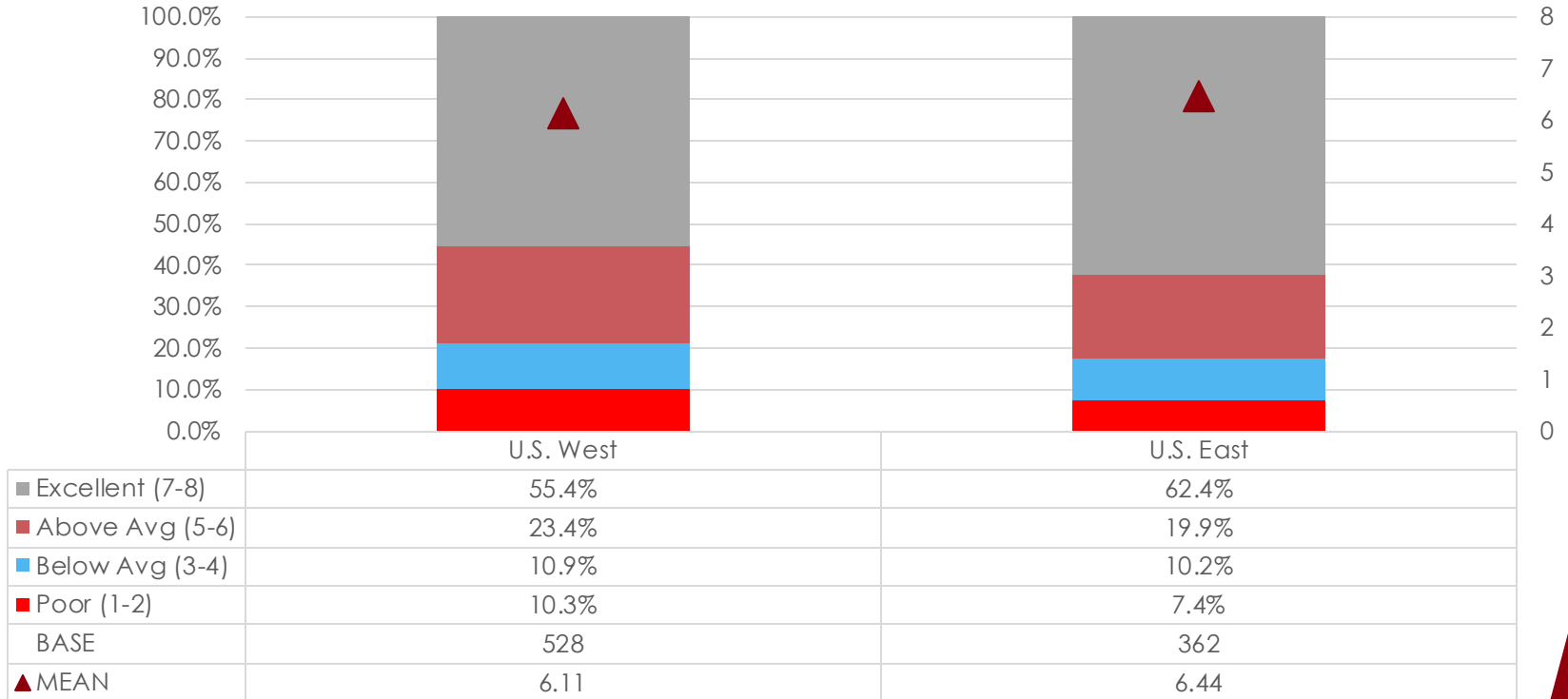
UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q2 2019	Q2 2020 P
52.9% Too expensive	37.6% Too expensive
41.8% Want to go someplace new	37.2% COVID-19
41.2% Flight is too long	15.6% Unfriendly people/ felt unwelcome
19.0% Five years is too soon	12.7% Want to go someplace new
17.0% Other financial obligations	12.5% Poor value
16.1% Poor value	12.4% Too crowded/ congested/ traffic
12.8% Too crowded/ congested/ traffic	12.4% Too commercialized/ overdeveloped
11.1% Too commercialized/ overdeveloped	

P= Preliminary Data

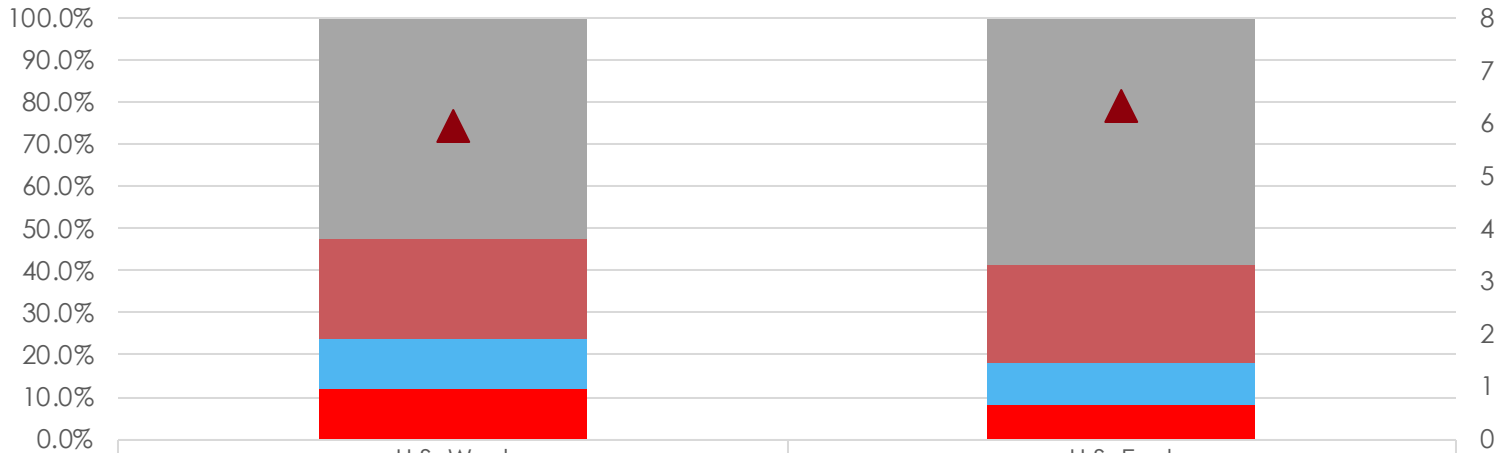
OFFERING A VARIETY OF EXPERIENCES

8-pt Rating Scale
8=Excellent / 1=Poor



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

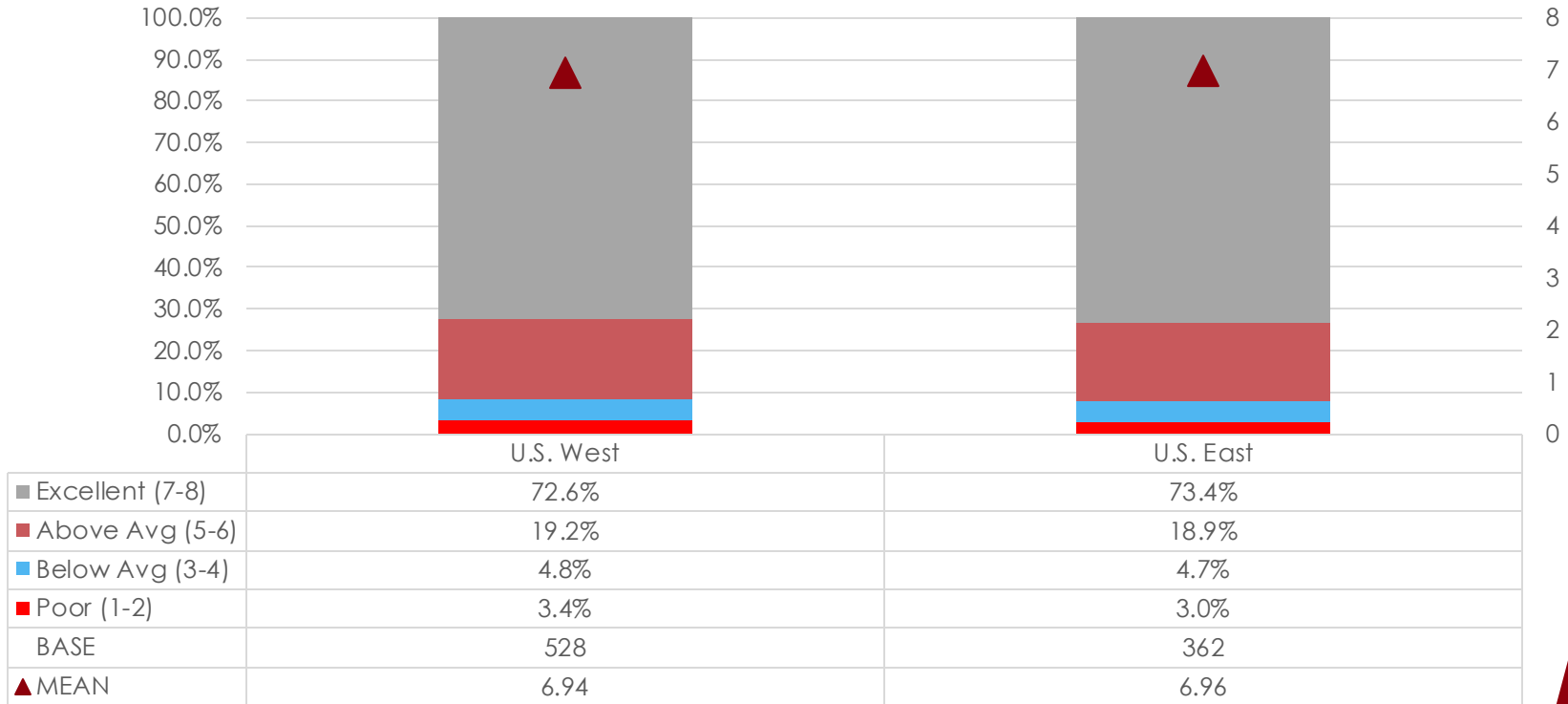
8-pt Rating Scale
8=Excellent / 1=Poor



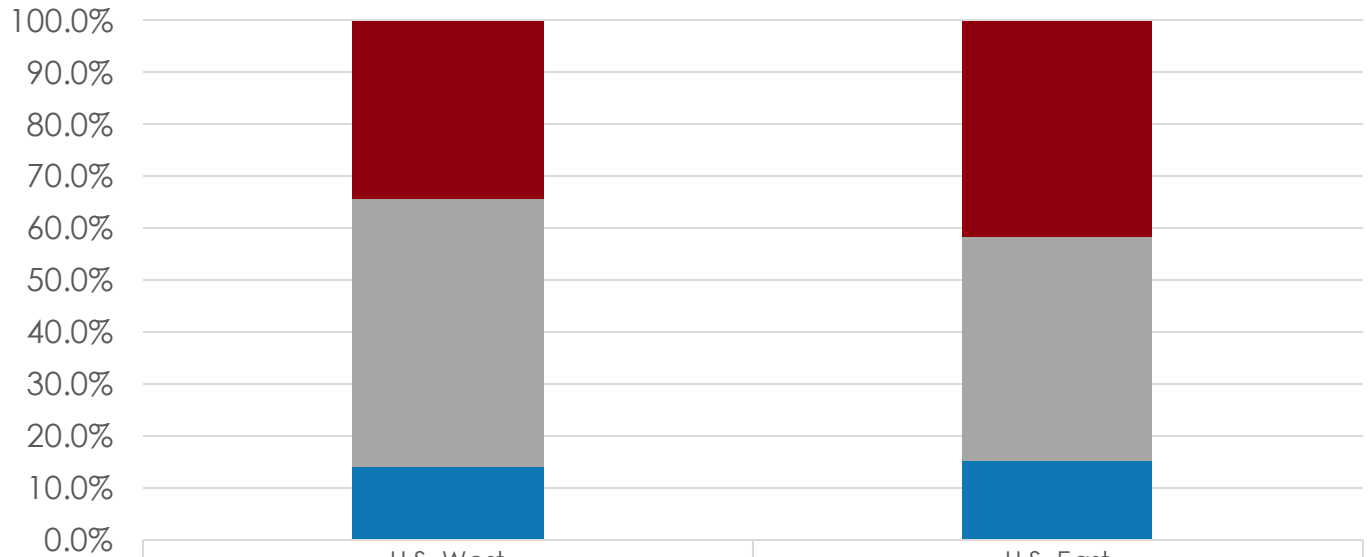
	U.S. West	U.S. East
■ Excellent (7-8)	52.6%	58.8%
■ Above Avg (5-6)	23.7%	23.3%
■ Below Avg (3-4)	12.0%	9.9%
■ Poor (1-2)	11.7%	8.0%
BASE	528	362
▲ MEAN	5.96	6.33

BEING A SAFE AND SECURE DESTINATION

8-pt Rating Scale
8=Excellent / 1=Poor



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



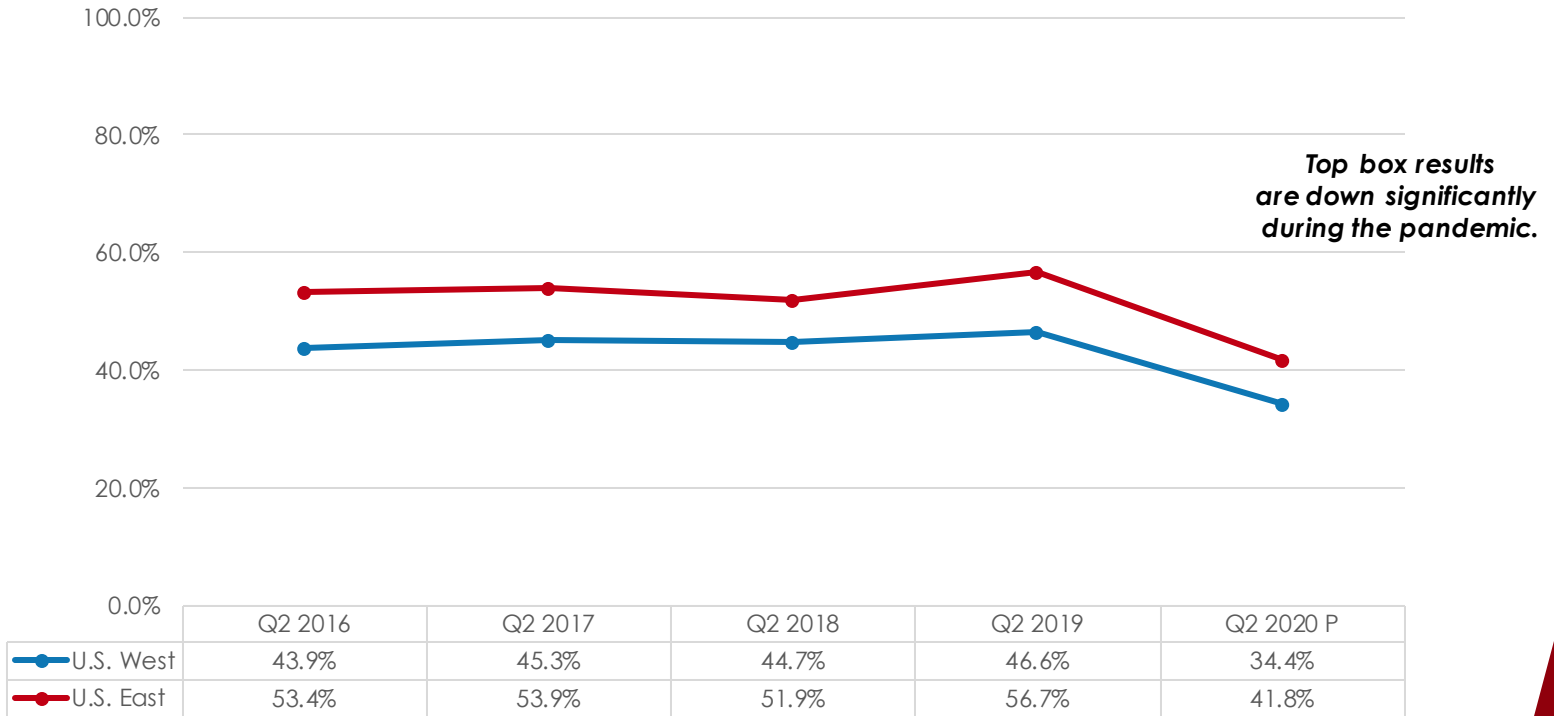
	U.S. West	U.S. East
■ Exceeded expectations	34.4%	41.8%
■ Met expectations	51.5%	43.0%
■ Did NOT meet expectations	14.1%	15.2%
BASE	528	362

SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Age:** Younger travelers from U.S. West and U.S. East were more satisfied with their trip in terms of prior expectations than older travelers from these visitor markets. Seniors in particular were the least satisfied in this area.
- **Gender:** Female travelers from U.S. West were more likely to agree that their trip exceeded expectations than males from these visitor markets.

SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



P= Preliminary Data

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
TOTAL	71.1%	82.9%
On own (self-guided)	61.4%	70.4%
Helicopter/ airplane	0.4%	1.4%
Boat/ submarine/ whale	2.5%	4.8%
Visit towns/communities	21.7%	30.2%
Limo/ van/ bus tour	0.9%	1.1%
Scenic views/ natural landmark	26.2%	44.1%
Movie/ TV/ film location	1.0%	2.0%

ACTIVITIES – RECREATION

	U.S. West	U.S. East
TOTAL	68.4%	80.8%
Beach/ sunbathing	55.3%	68.5%
Bodyboarding	8.0%	7.0%
Standup paddle board	8.5%	5.1%
Surfing	10.1%	10.8%
Canoeing/ kayak	3.0%	6.2%
Swim in the ocean	38.5%	52.6%
Snorkeling	20.7%	21.5%
Freediving	1.5%	1.4%
Windsurf/ Kitesurf	0.4%	1.1%
Jet ski/ Parasail	0.6%	0.8%
Scuba diving	1.1%	2.0%
Fishing	4.9%	4.8%
Golf	4.7%	3.4%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
TOTAL	68.4%	80.8%
Run/ Jog/ Fitness walk	31.5%	40.6%
Spa	2.0%	2.8%
Hiking	28.9%	41.3%
Backpack/ camp	3.4%	6.2%
Agritourism	3.6%	5.4%
Sport event/ tournament	0.9%	0.0%
Park/ botanical garden	13.7%	22.9%
Waterpark	1.0%	2.5%
Mountain tube/ waterfall rappel	0.4%	1.7%
Zip-lining	1.5%	2.0%
Skydiving	0.8%	0.8%
All terrain vehicle (ATV)	1.4%	1.7%
Horseback riding	0.8%	1.7%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	88.4%	93.2%
Lunch/ sunset/ dinner/ evening cruise	8.1%	9.4%
Live music/ stage show	2.6%	2.0%
Nightclub/ dancing/ bar/ karaoke	2.3%	6.0%
Fine dining	13.1%	16.7%
Family restaurant	26.9%	33.3%
Fast food	38.3%	50.2%
Food truck	27.1%	31.4%
Café/ coffee house	20.6%	25.4%
Ethnic dining	14.6%	19.8%
Prepared own meal	68.7%	72.6%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East
TOTAL	69.9%	79.3%
Mall/ department store	24.2%	31.1%
Designer boutique	5.0%	5.4%
Hotel/ resort store	2.8%	5.4%
Swap meet/ flea market	8.3%	9.6%
Discount/ outlet store	10.5%	14.1%
Supermarket	55.2%	61.9%
Farmer's market	22.0%	21.1%
Convenience store	29.0%	36.8%
Duty free store	1.0%	0.9%
Local shop/ artisan	24.2%	29.1%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
TOTAL	30.1%	37.6%
Historic military site	7.4%	15.9%
Other historical site	8.9%	12.5%
Museum/ art gallery	4.2%	5.1%
Luau/ Polynesian show/ hula show	1.6%	2.2%
Lesson- ex. ukulele, hula, canoe, lei making	1.0%	2.6%
Play/ concert/ theatre	0.9%	0.6%
Art/ craft fair	0.9%	1.4%
Festival event	11.4%	8.1%

ACTIVITIES – TRANSPORTATION

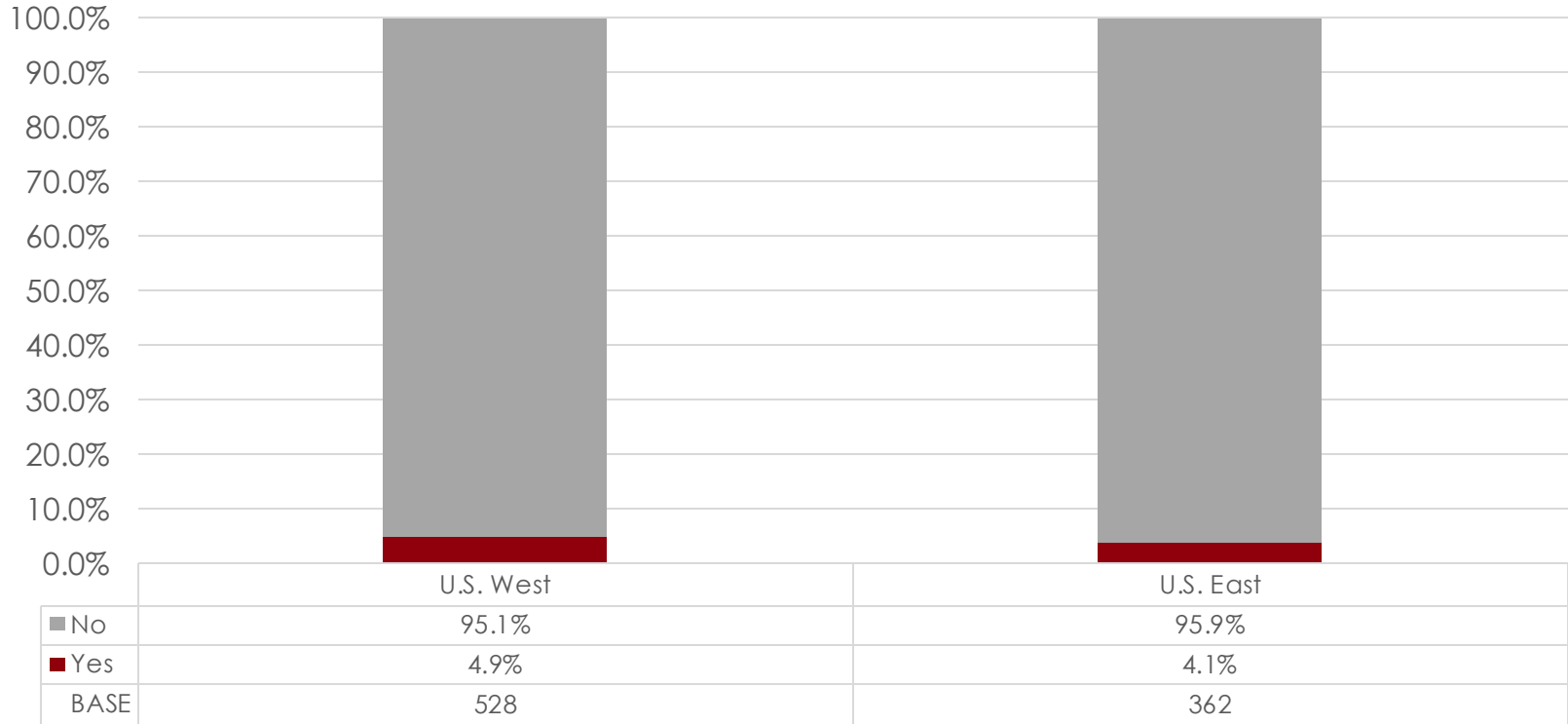
	U.S. West	U.S. East
TOTAL	44.5%	55.2%
Airport shuttle	3.7%	4.5%
Trolley	0.4%	0.0%
Public bus	4.4%	3.7%
Tour bus/ tour van	0.4%	0.0%
Taxi/ limo	8.1%	6.2%
Rental car	28.0%	35.7%
Ride share	12.0%	17.0%
Bicycle rental	2.0%	2.0%

ACTIVITIES – OTHER

	U.S. West	U.S. East
TOTAL	72.5%	68.8%
Visit friends/ family	71.6%	68.2%
Volunteer non-profit	3.0%	1.7%

SECTION – TRAVELERS WITH DISABILITIES

DISABLED TRAVELER – REQUIRED ASSISTANCE

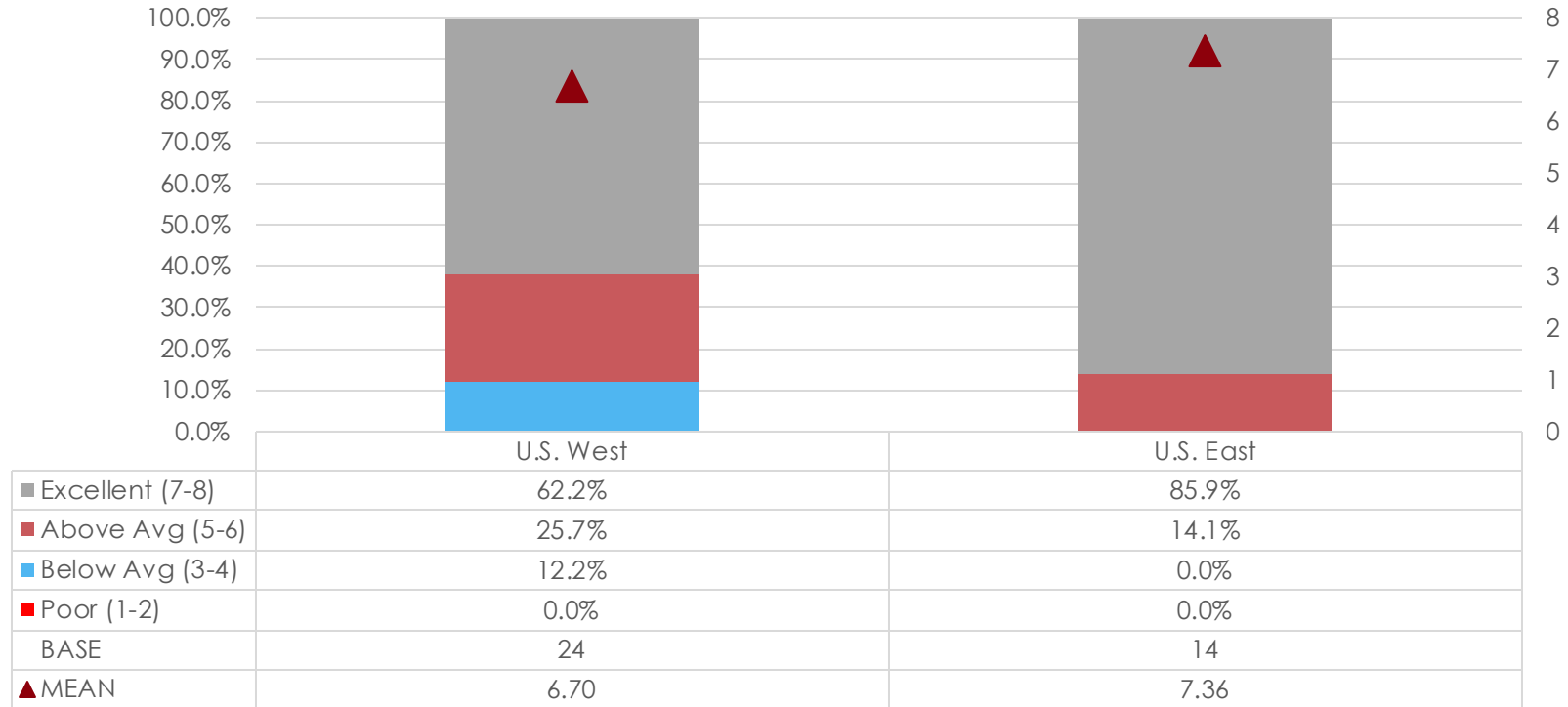


DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane)	84.4%	85.8%
Personal assistance	37.7%	21.2%
No one in our travel party required assistance	3.9%	7.1%
Lift equipped van	5.2%	0.0%
Other disability related aid	3.9%	0.0%
Service/ assistance animal	0.0%	0.0%
Print material in alternate format	0.0%	0.0%
Orientation and mobility assistance	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	0.0%
BASE	25	14

OVERALL ACCESSIBILITY – AIRPORTS

8-pt Rating Scale
8=Excellent / 1=Poor



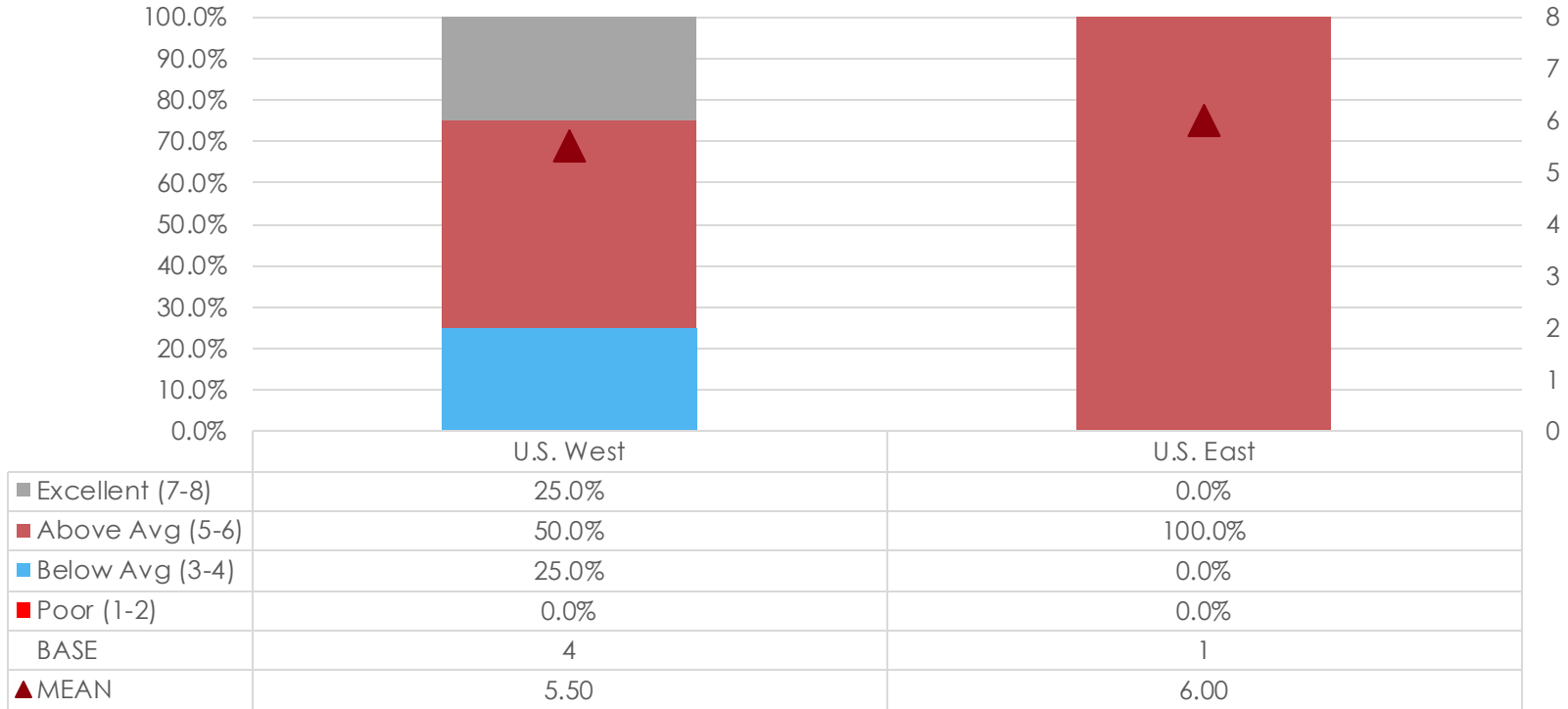
OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

8-pt Rating Scale
8=Excellent / 1=Poor



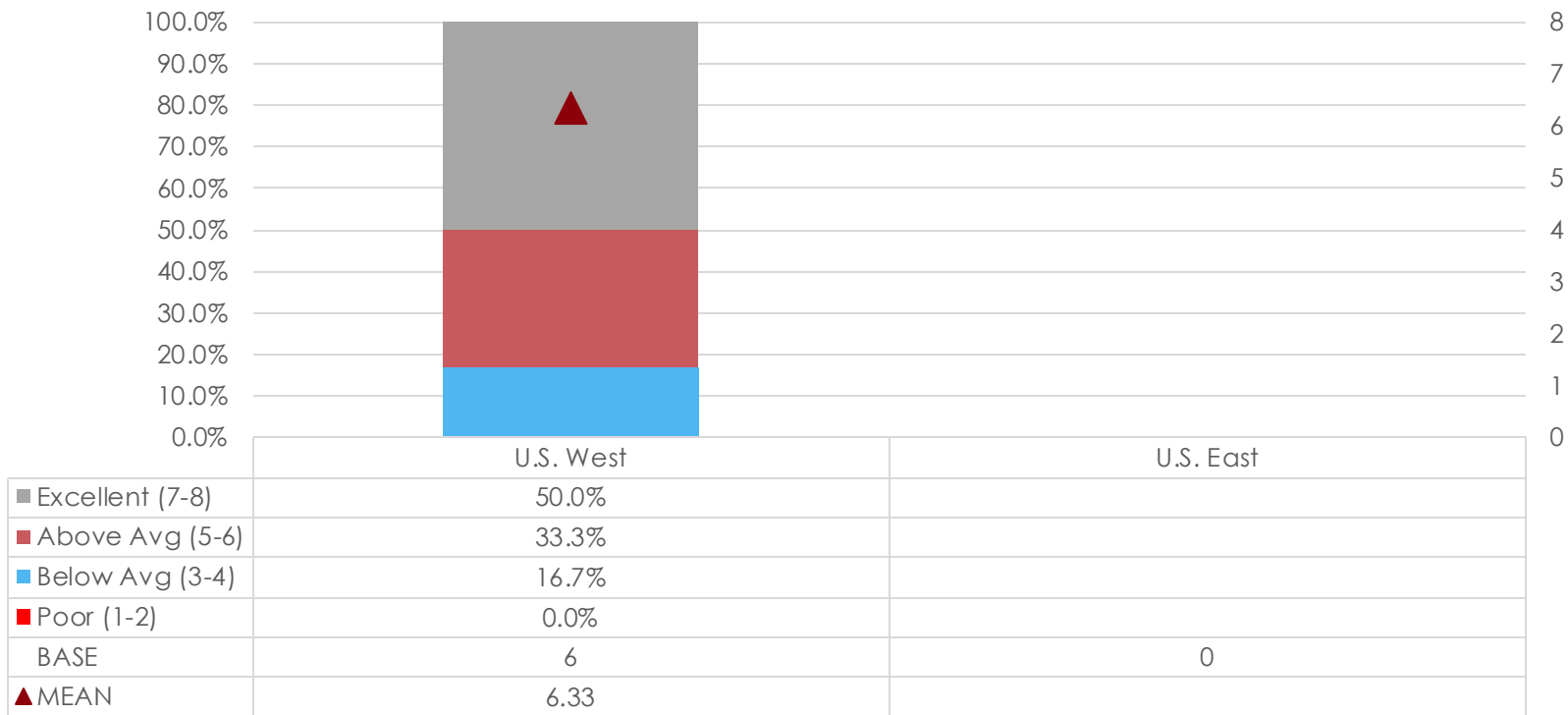
OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

8-pt Rating Scale
8=Excellent / 1=Poor



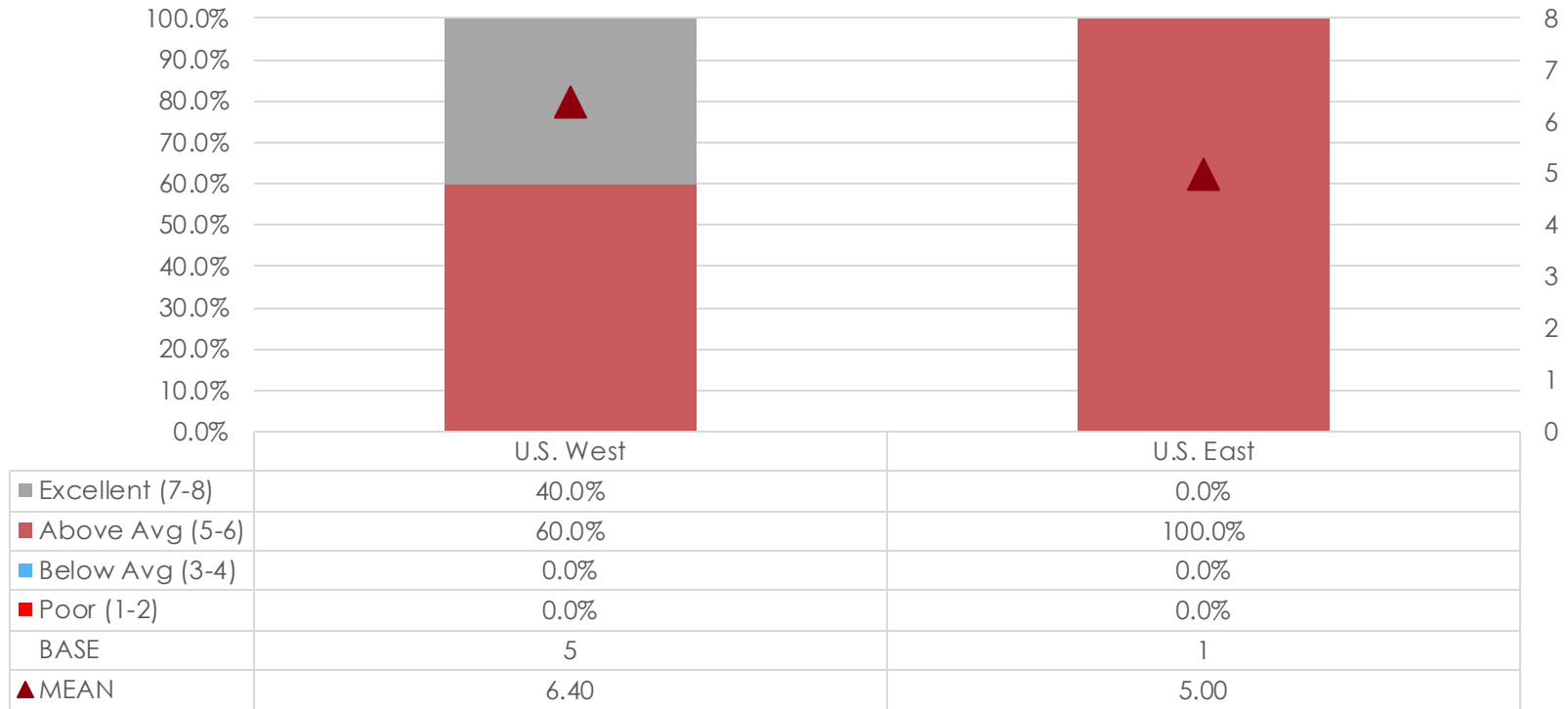
OVERALL ACCESSIBILITY – RIDE SHARE

8-pt Rating Scale
8=Excellent / 1=Poor



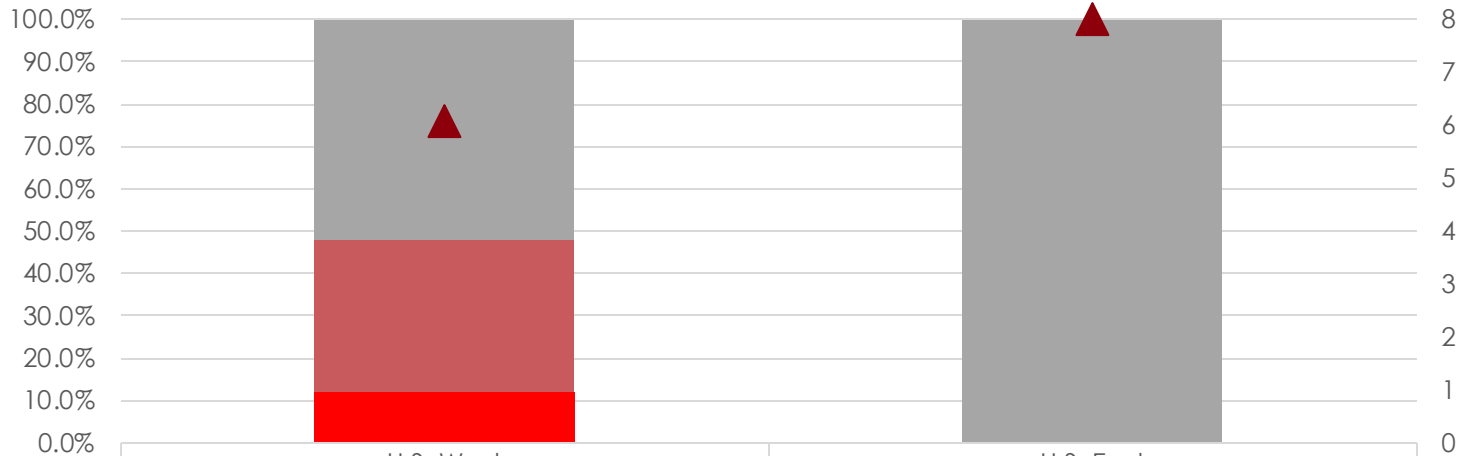
OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

8-pt Rating Scale
8=Excellent / 1=Poor



OVERALL ACCESSIBILITY – HOTELS

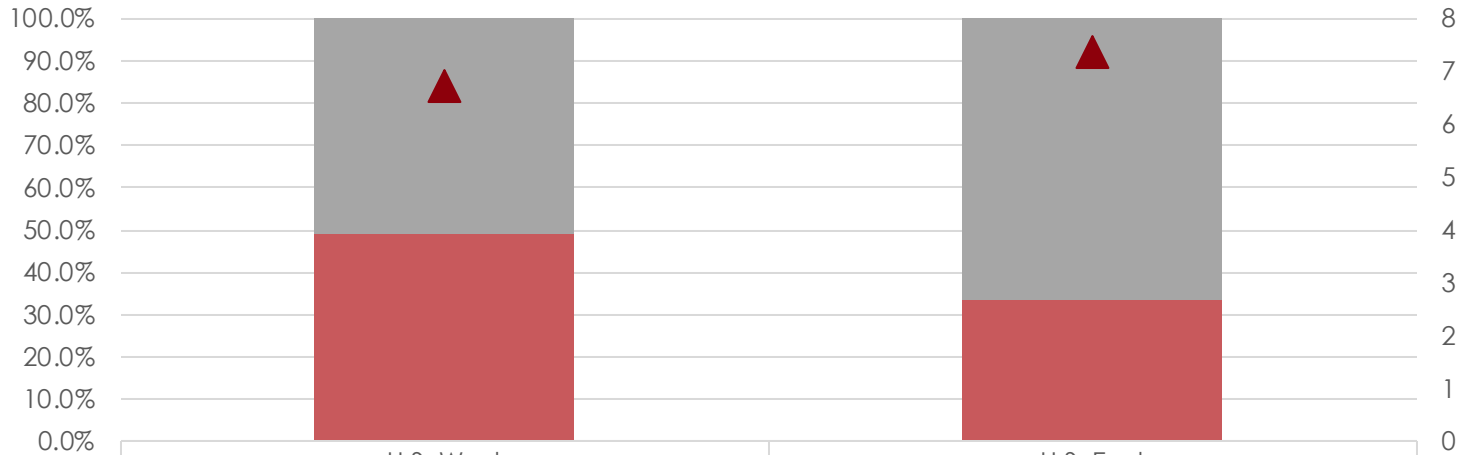
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	52.1%	100.0%
■ Above Avg (5-6)	35.9%	0.0%
■ Below Avg (3-4)	0.0%	0.0%
■ Poor (1-2)	12.0%	0.0%
BASE	8	1
▲ MEAN	6.08	8.00

OVERALL ACCESSIBILITY – RESTAURANTS

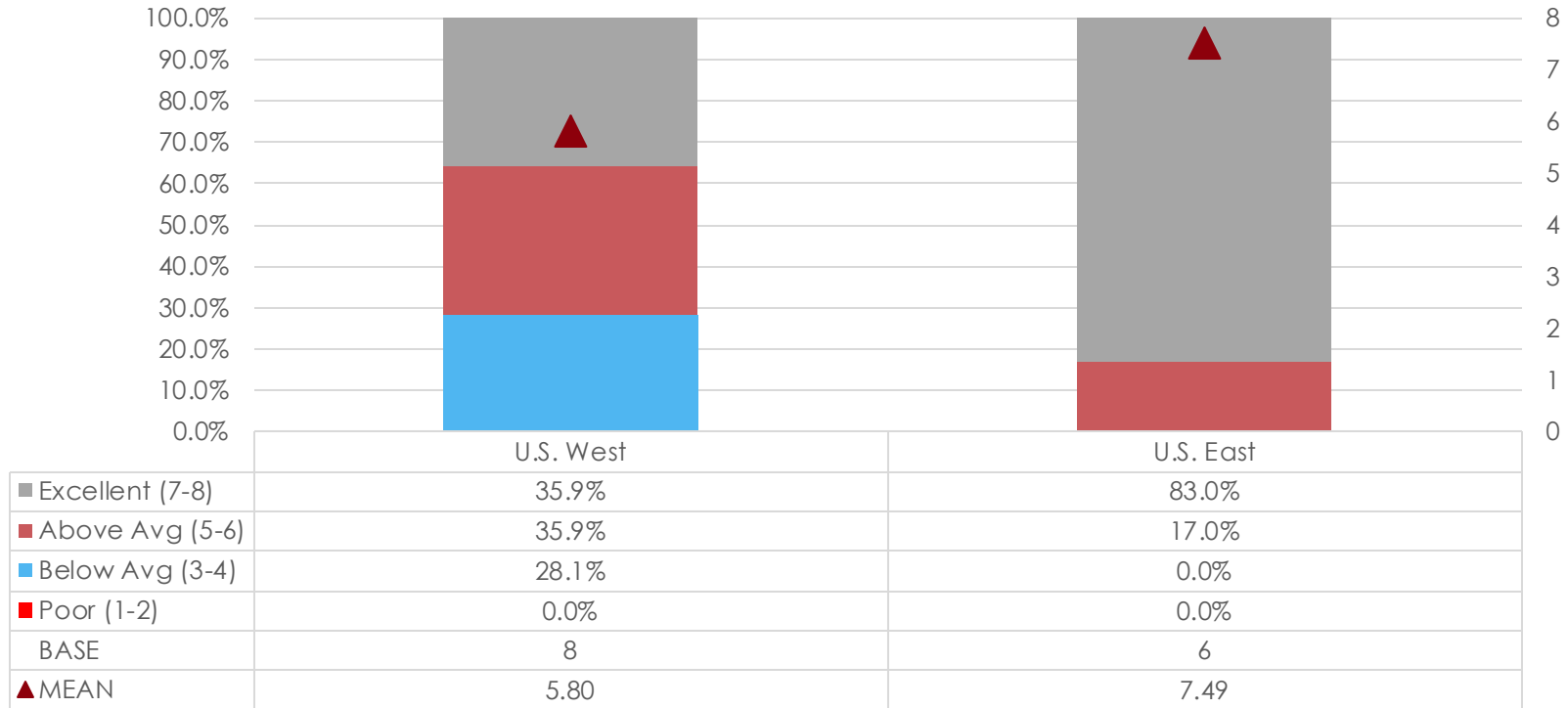
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	51.1%	66.4%
■ Above Avg (5-6)	48.9%	33.6%
■ Below Avg (3-4)	0.0%	0.0%
■ Poor (1-2)	0.0%	0.0%
BASE	16	6
▲ MEAN	6.70	7.36

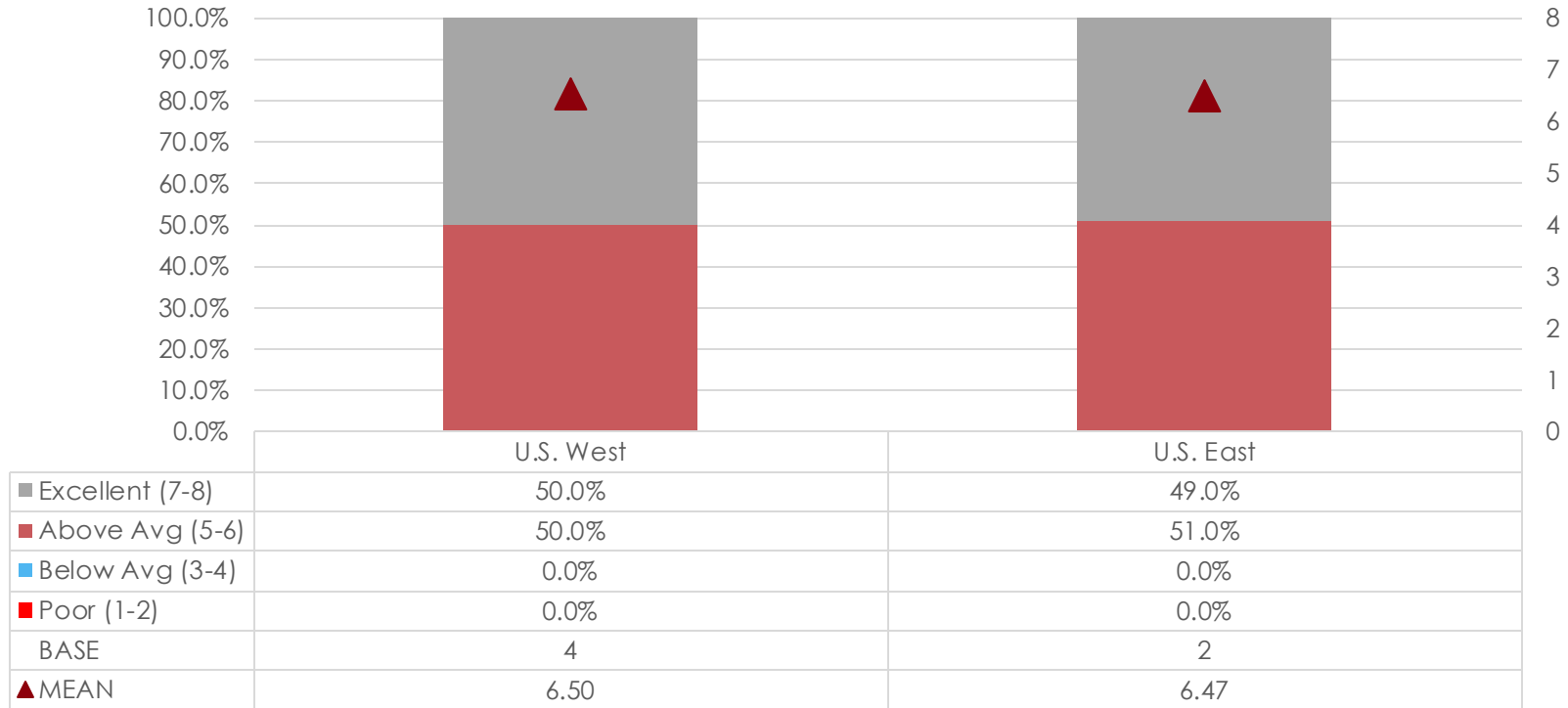
OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

8-pt Rating Scale
8=Excellent / 1=Poor



OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

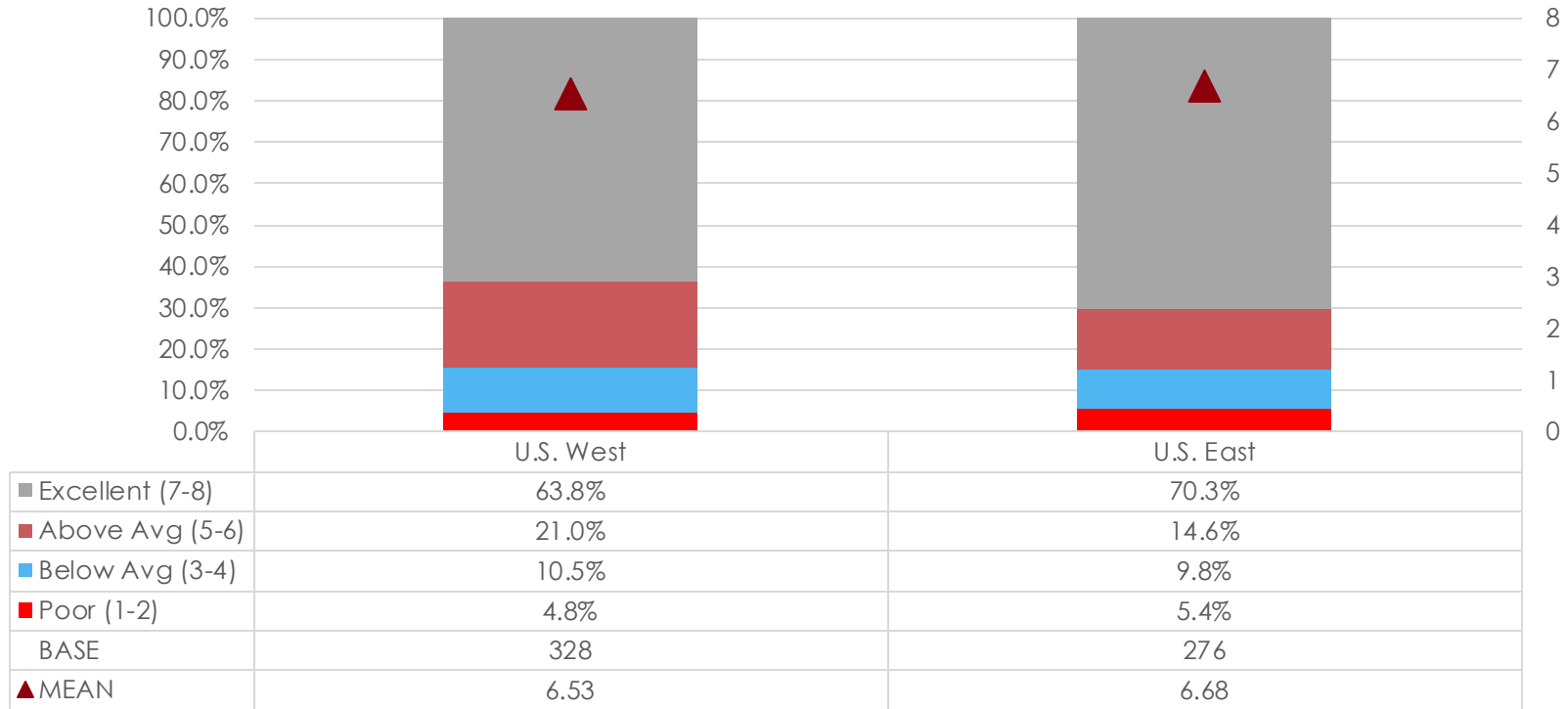
8-pt Rating Scale
8=Excellent / 1=Poor



SECTION – O'AHU

SATISFACTION – O‘AHU

8-pt Rating Scale
8=Excellent / 1=Poor

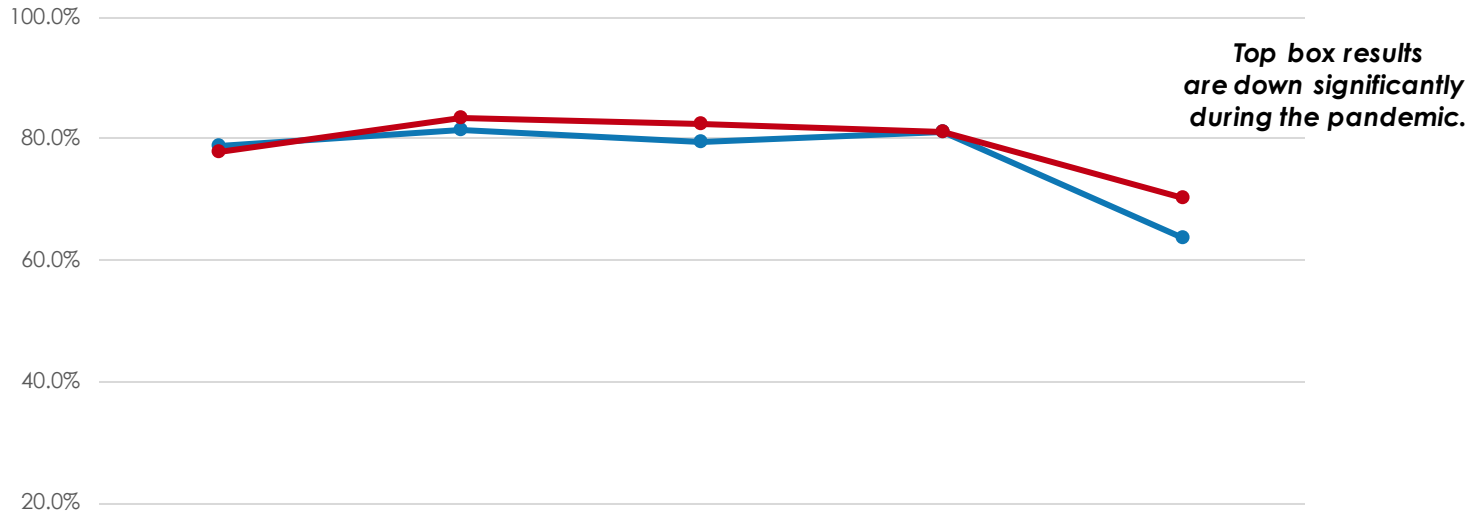


SATISFACTION – O‘AHU

- **Gender:** Female visitors from both U.S. West and U.S. East were more satisfied with their stay on O‘ahu than males.
- **Age:** Younger travelers from U.S. East, or those under the age of 35 were the most satisfied with their stay on O‘ahu while seniors from this market were the least satisfied.

SATISFACTION – O‘AHU

Tracking Data – Rating of “Excellent” (7-8)

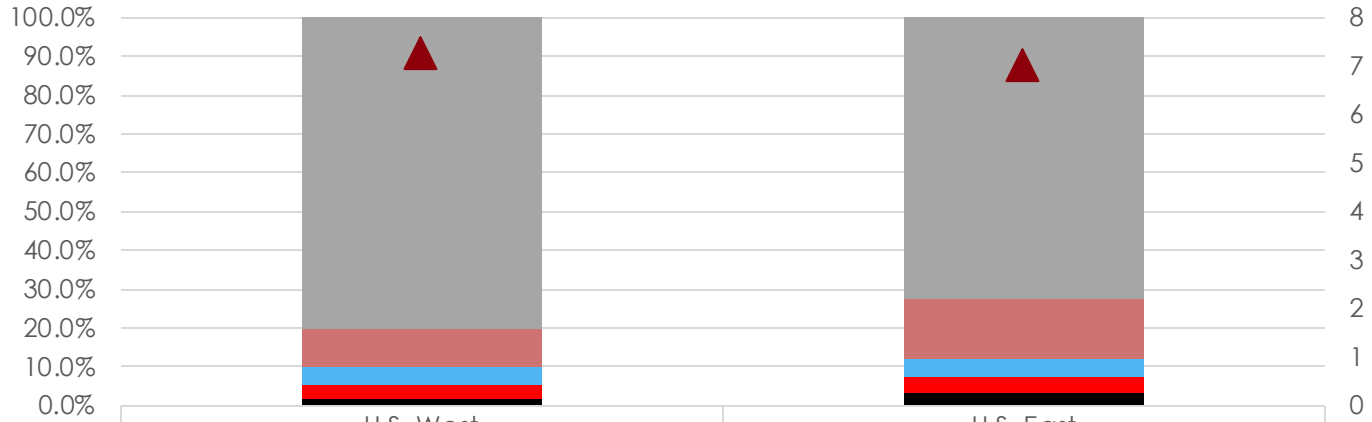


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P
U.S. West	78.8%	81.4%	79.4%	81.0%	63.8%
U.S. East	77.7%	83.3%	82.3%	81.1%	70.3%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

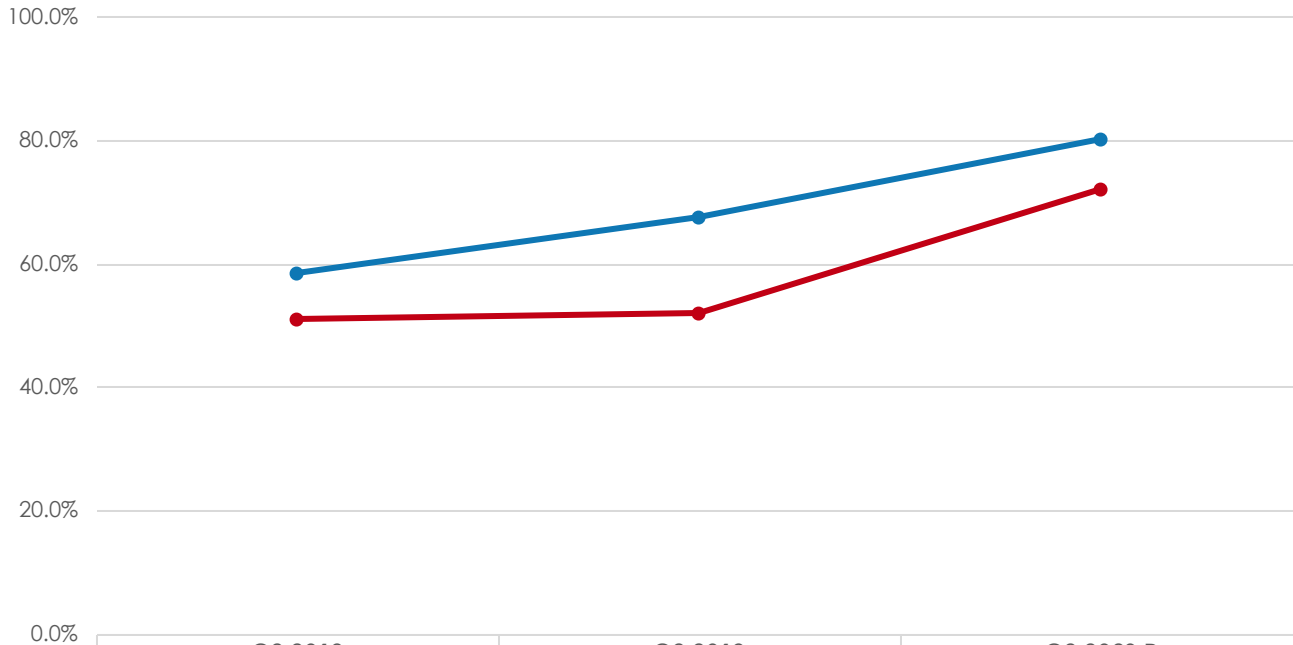
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	80.3%	72.3%
■ Somewhat likely (5-6)	10.1%	15.6%
■ Somewhat unlikely (3-4)	4.4%	4.5%
■ Very unlikely (1-2)	3.6%	4.1%
■ Not sure	1.7%	3.4%
BASE	310	265
▲ MEAN	7.26	7.02

LIKELIHOOD OF RETURN VISIT – O‘AHU

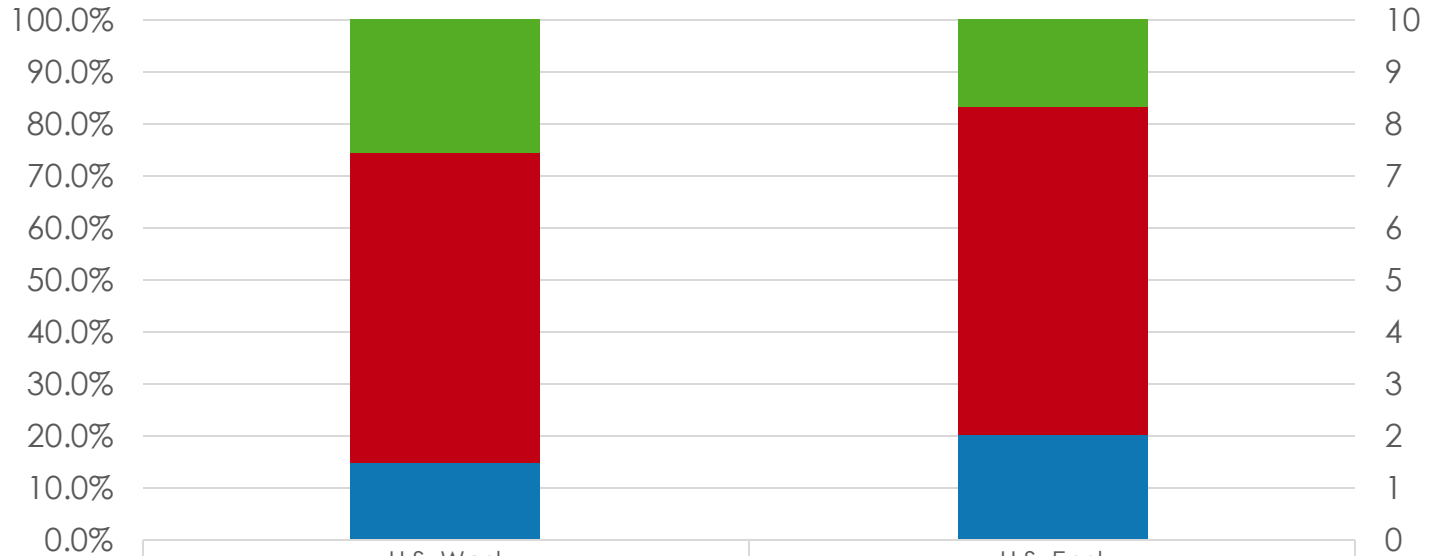
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P
U.S. West	58.6%	67.8%	80.3%
U.S. East	51.1%	52.0%	72.3%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
■ Aided Ad Awareness	25.7%	16.8%
■ No Prior Awareness	59.6%	63.2%
■ Unsure	14.7%	20.0%
BASE	311	266

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
Atlantis Submarine & Cruises	0.6%	0.8%
Bernice P. Bishop Museum	1.4%	1.5%
Byodo-In Temple	0.6%	0.4%
Chinatown & Honolulu Art District	6.5%	8.5%
Diamond Head State Monument	5.3%	8.9%
Dole Plantation	2.7%	3.8%
Haleiwa	15.2%	22.4%
Hanauma Bay Nature Reserve	3.4%	2.3%
Harold L. Lyon Arboretum	0.3%	1.5%
Hawai‘i State Art Museum or Honolulu Museum of Art	2.5%	0.4%
Hawaiian Mission Houses, Historic Site and Archive	0.6%	0.4%
Hawai‘i’s Plantation Village	0.0%	0.4%
Honolulu Zoo	4.7%	5.1%

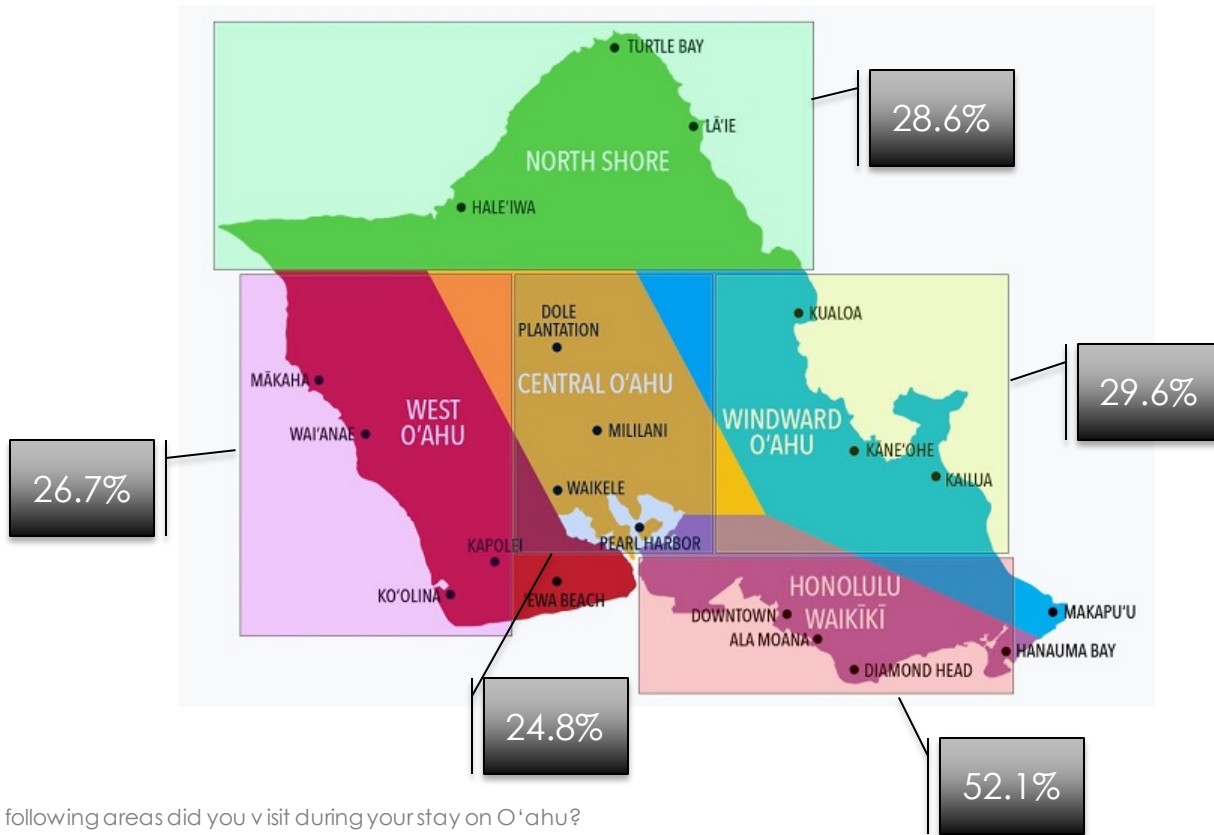
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
Ho‘omaluhia Botanical Garden	5.6%	7.8%
Iolani Palace State Monument	0.4%	1.5%
Kaiwi State Scenic Shoreline/ Makapuu Trail	4.3%	5.8%
Kakaako Street Art	2.1%	3.5%
Koko Head Crater Trail	5.1%	7.4%
Kualoa Private Nature Reserve	2.4%	3.1%
Lanikai or Kailua Beach	18.7%	29.8%
Manoa Falls & Trail	5.4%	8.1%
National Memorial Cemetery of the Pacific	1.5%	3.1%
Nuuanu Pali Lookout	3.5%	10.1%
North Shore Beaches	28.1%	40.1%

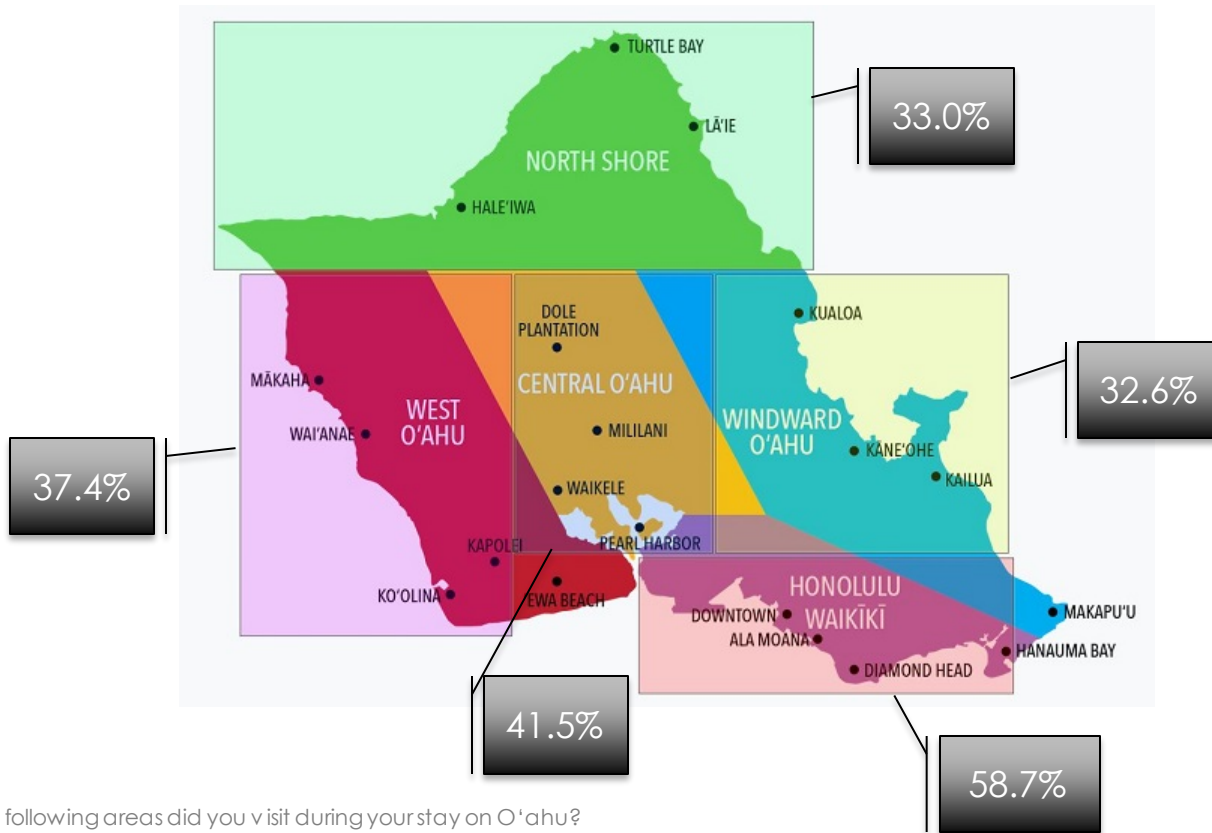
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
Pearl Harbor	7.6%	14.4%
Polynesian Cultural Center	1.0%	2.3%
Queen Emma’s Summer Palace	0.3%	1.5%
Sea Life Park Hawai‘i	0.6%	1.9%
Waikiki Aquarium	2.1%	4.7%
Waimanalo Beach Park	9.4%	15.0%
Waimea Valley	7.7%	11.5%

AREAS VISITED U.S. WEST

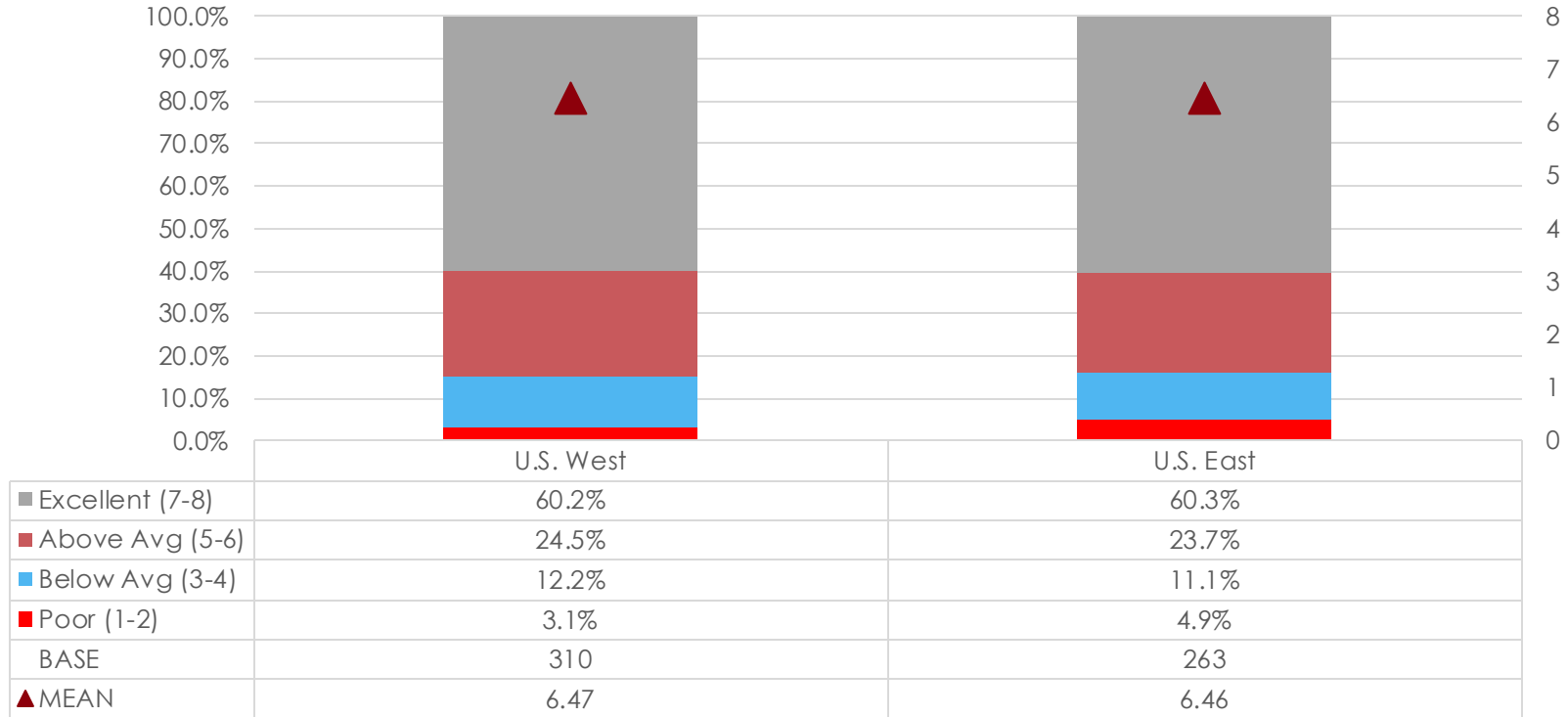


AREAS VISITED U.S. EAST

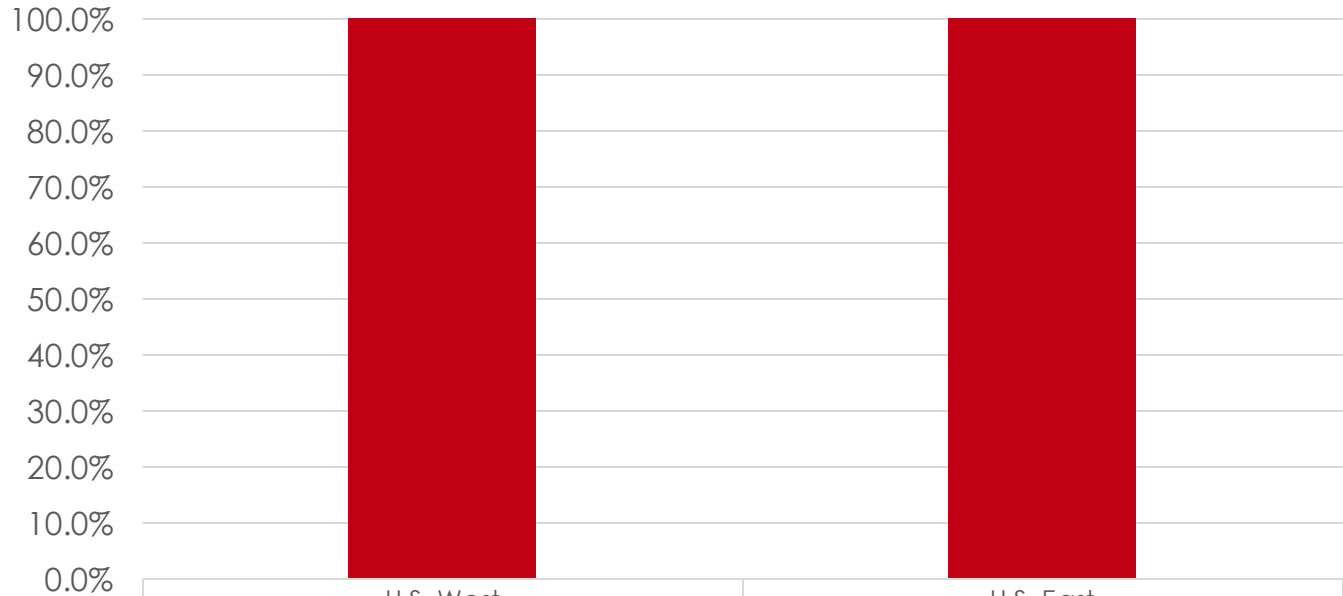


SATISFACTION – Daniel K. Inouye International Airport

8-pt Rating Scale
8=Excellent / 1=Poor

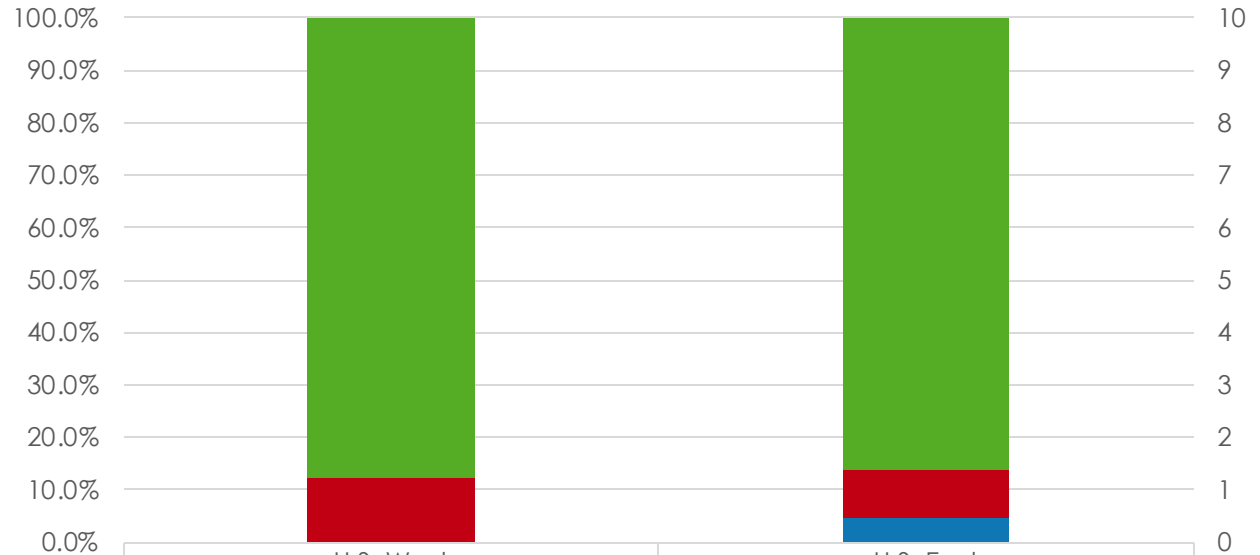


TRANSPAC TRAVEL OPTIONS – O‘AHU



	U.S. West	U.S. East
Air/ Flight	100.0%	100.0%
Cruise Ship/ Ocean Vessel	0.0%	0.0%
BASE	310	263

SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	87.8%	86.2%
■ Full-face snorkel mask	12.2%	9.2%
■ Goggles/ Mask, no snorkel	0.0%	4.6%
BASE	42	44

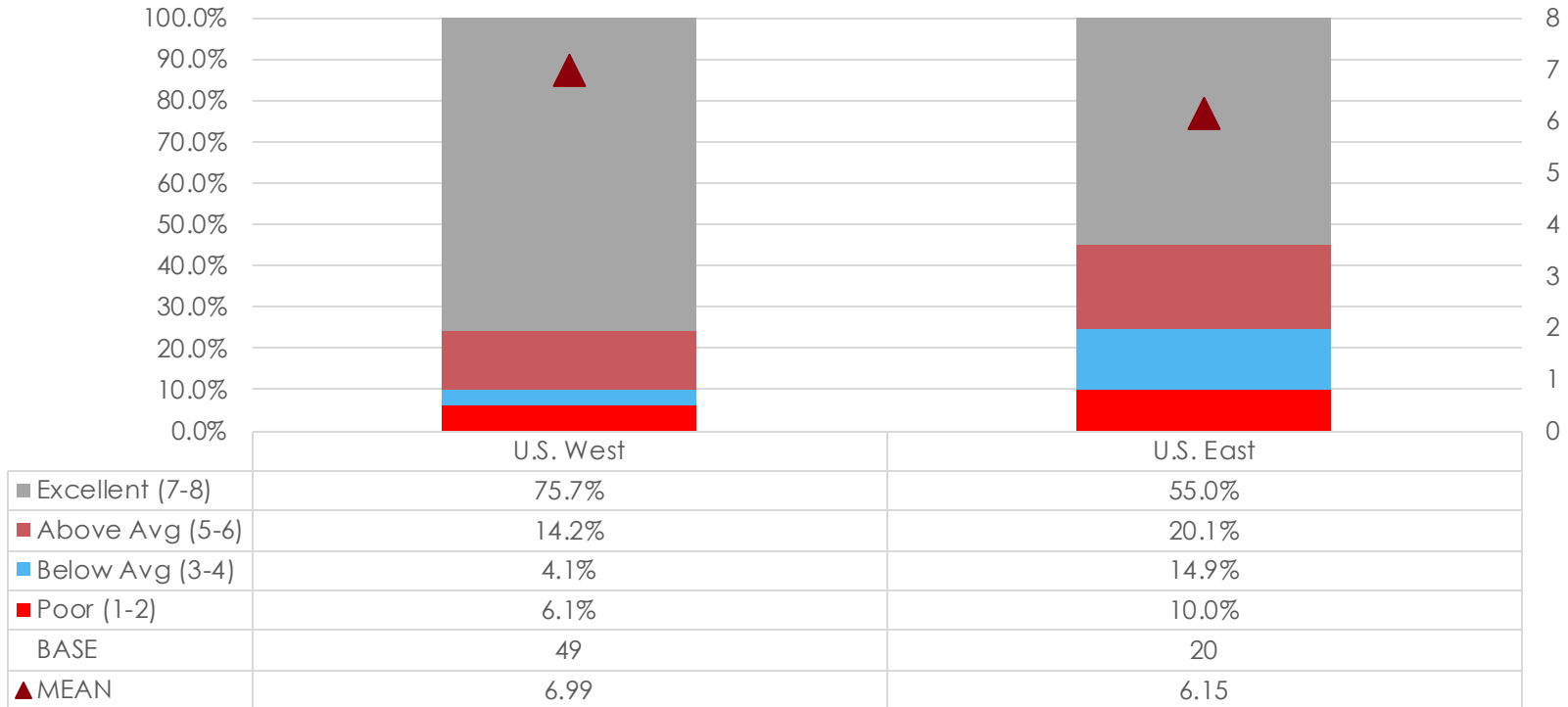
SNORKELING OCEAN SAFETY – O‘AHU

	U.S. West	U.S. East
Did not have to be assisted or rescued	96.9%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	3.1%	0.0%
BASE	42	44

SECTION – KAUA‘I

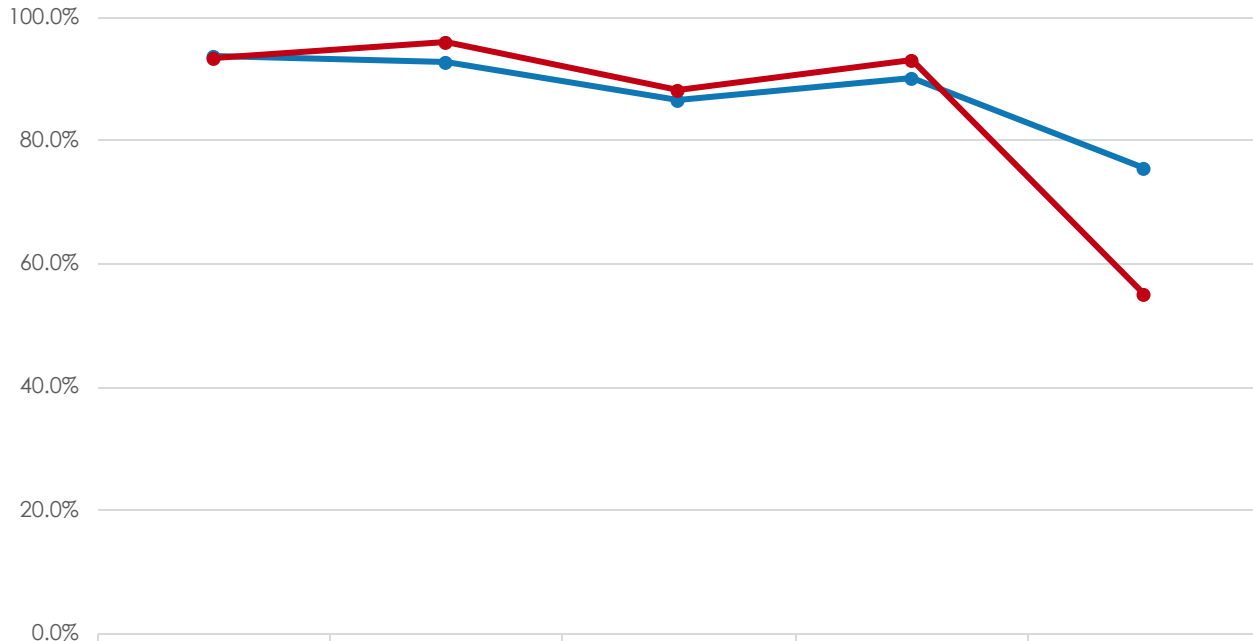
SATISFACTION – KAUA‘I

8-pt Rating Scale
8=Excellent / 1=Poor



SATISFACTION – KAUA‘I

Tracking Data – Rating of “Excellent” (7-8)

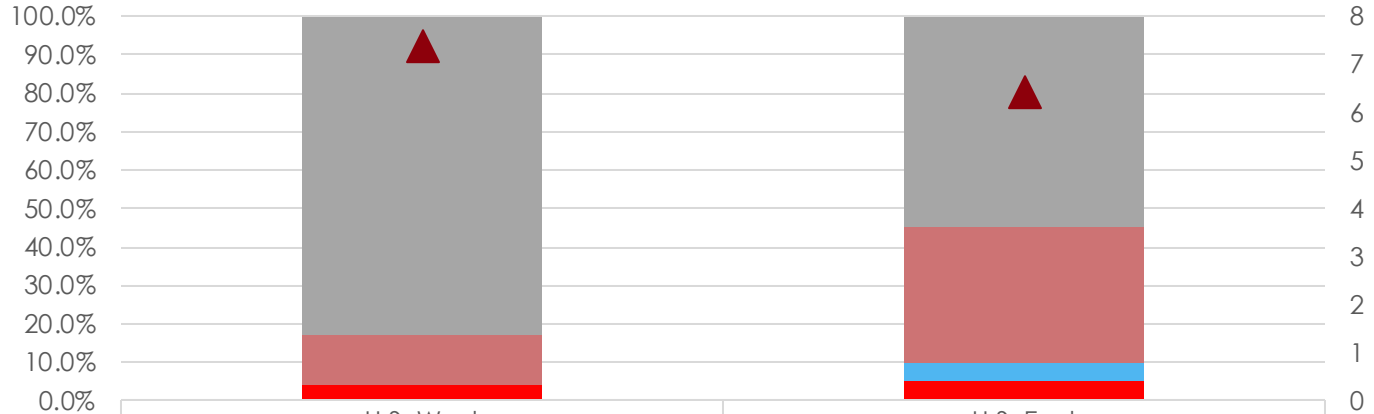


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q1 2020 P
U.S. West	93.6%	92.8%	86.5%	90.2%	75.7%
U.S. East	93.5%	96.1%	88.3%	93.2%	55.0%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – KAUA‘I

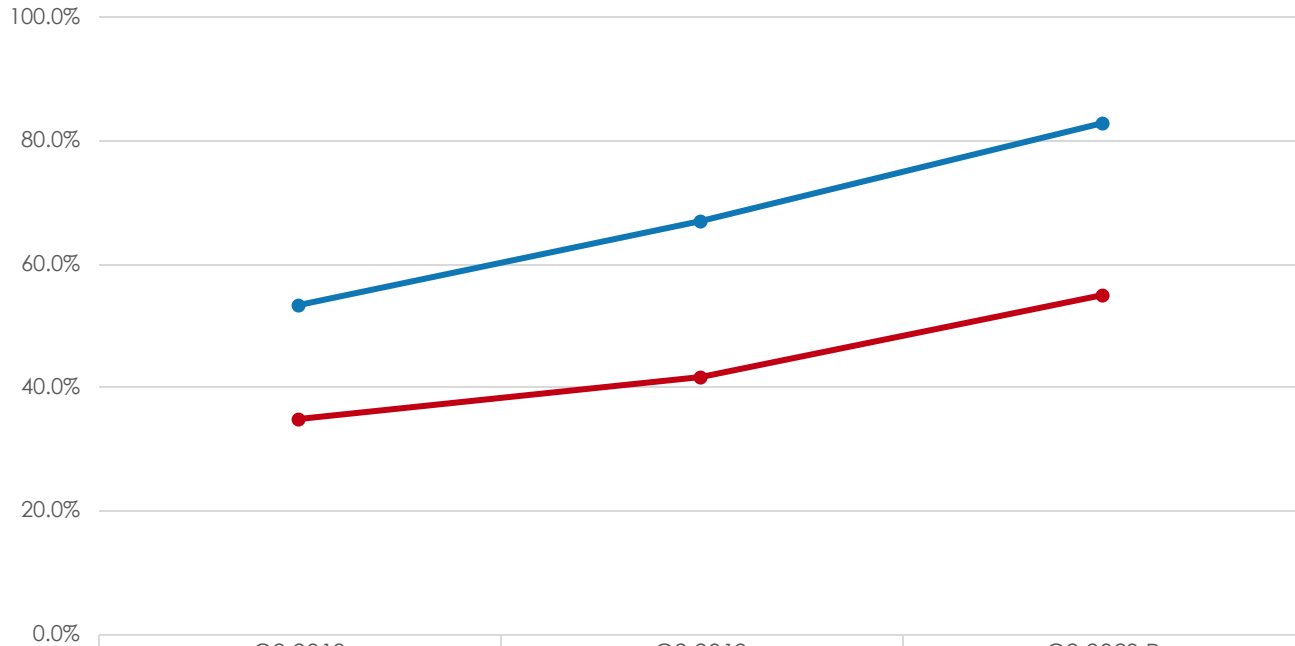
8-pt Rating Scale
8=V ery Likely / 1=V ery Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	83.1%	55.0%
■ Somewhat likely (5-6)	12.9%	35.1%
■ Somewhat unlikely (3-4)	0.0%	5.0%
■ Very unlikely (1-2)	4.1%	5.0%
■ Not sure	0.0%	0.0%
BASE	49	20
▲ MEAN	7.37	6.45

LIKELIHOOD OF RETURN VISIT – KAUA‘I

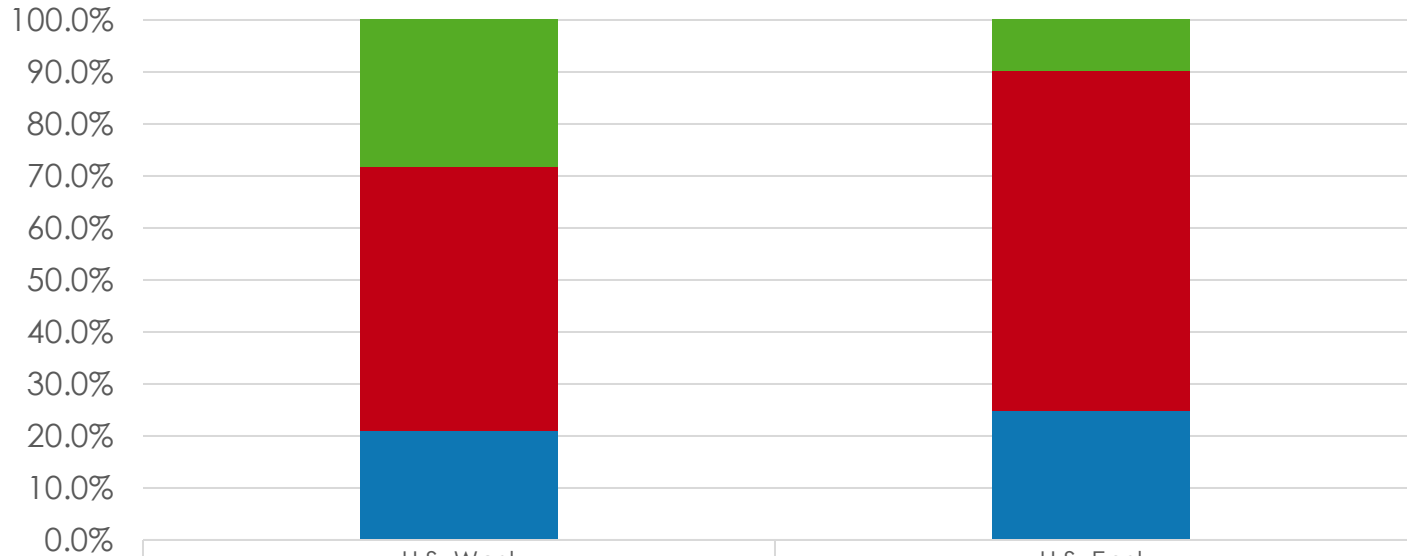
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P
U.S. West	53.4%	66.9%	83.1%
U.S. East	34.8%	41.8%	55.0%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – KAUA‘I



	U.S. West	U.S. East
Aided Ad Awareness	28.4%	10.0%
No Prior Awareness	50.7%	65.1%
Unsure	21.0%	24.9%
BASE	49	20

ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
Fern Grotto	4.1%	5.2%
Hanalei Town	36.5%	36.9%
Hanalei Beach	44.6%	47.2%
Kalalau Trail	16.2%	0.0%
Kalapaki Beach	18.2%	21.0%
Bike Path in Kapaa	8.1%	10.5%
Kaua‘i Museum	0.0%	5.2%
Ke‘e Beach	28.4%	21.2%
Kilauea Lighthouse	18.2%	10.5%
Koke‘e	18.2%	10.5%

ATTRACTIONS – KAUA‘I (cont.)

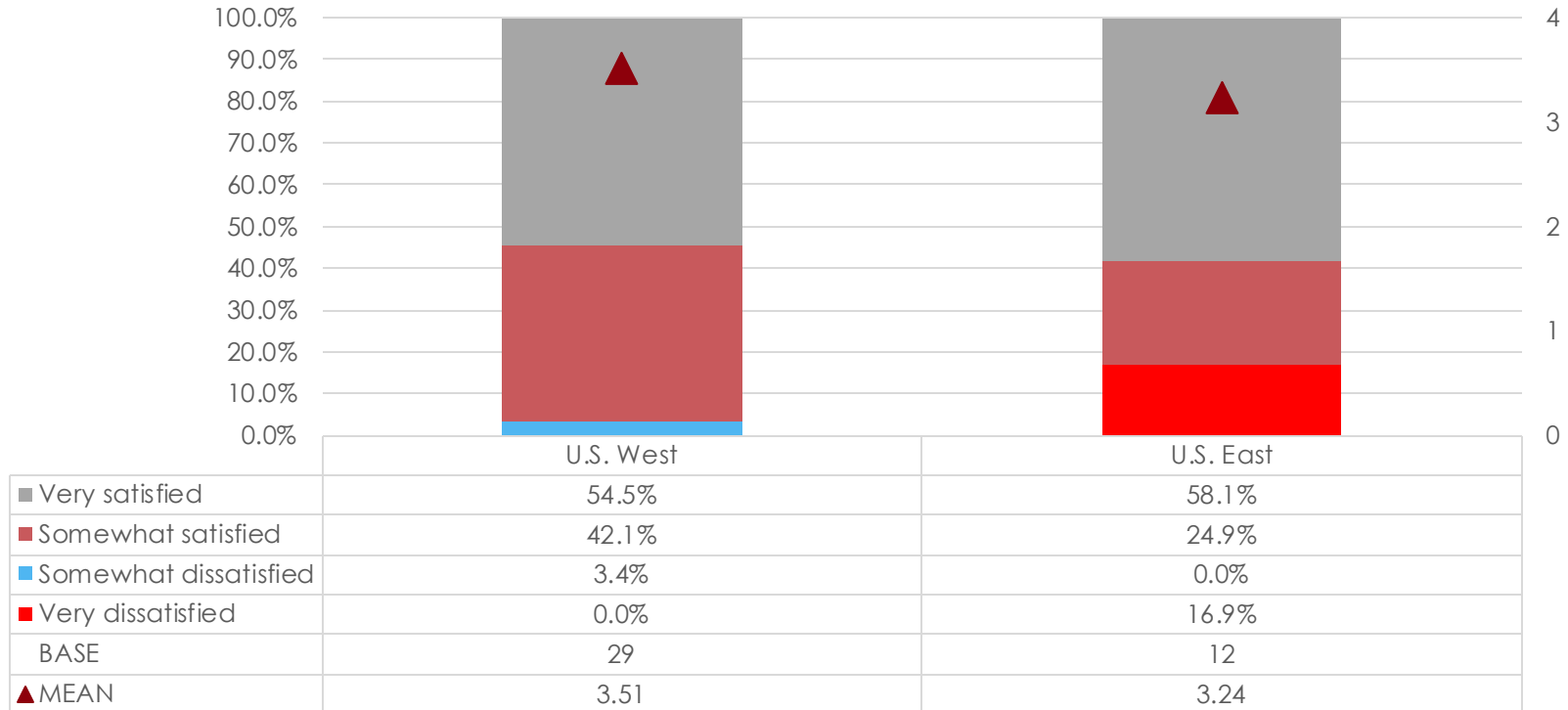
	U.S. West	U.S. East
Koke‘e Museum	2.0%	0.0%
Na Aina Kai Gardens	0.0%	5.2%
Napali Coast	18.2%	26.2%
Allerton Garden	6.1%	10.5%
Limahuli Garden	2.0%	10.5%
Old Koloa Town	42.6%	10.5%
Opaeka‘a Falls	10.1%	10.5%
Po‘ipu Beach	52.7%	42.1%
Smith’s Tropical Paradise Gardens	0.0%	5.2%
Spouting Horn	26.3%	31.9%
Wailua Falls	16.2%	31.7%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	8.1%	10.5%
Waimea Canyon	24.3%	36.9%
Disc Golf	4.1%	0.0%
Mini Golf	2.0%	0.0%

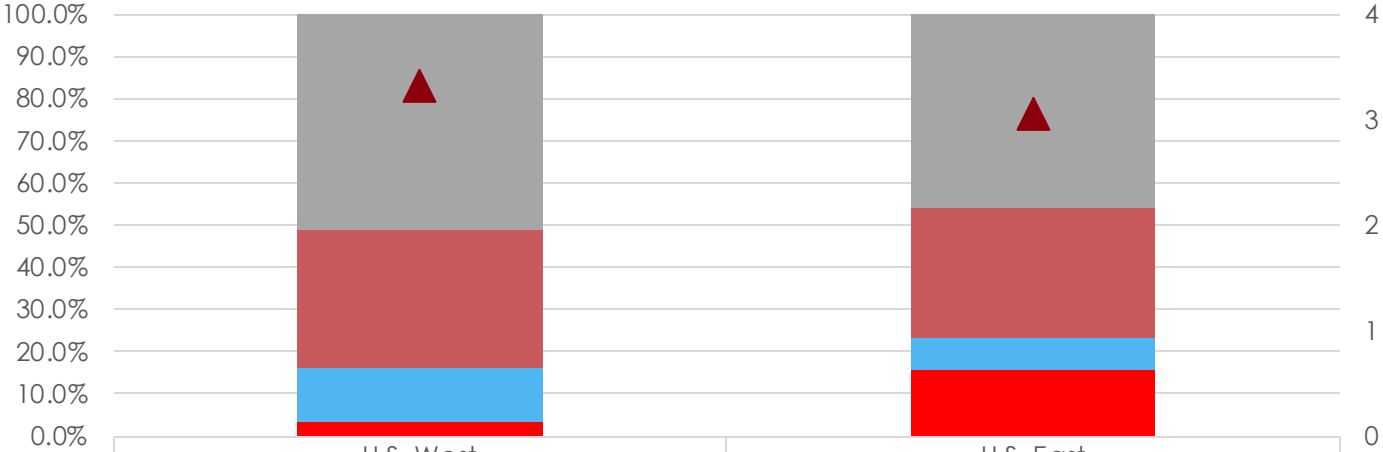
SATISFACTION – ENTERTAINMENT

4-pt Rating Scale
4=Very Satisfied / 1=Very Dissatisfied



SATISFACTION – SHOPPING

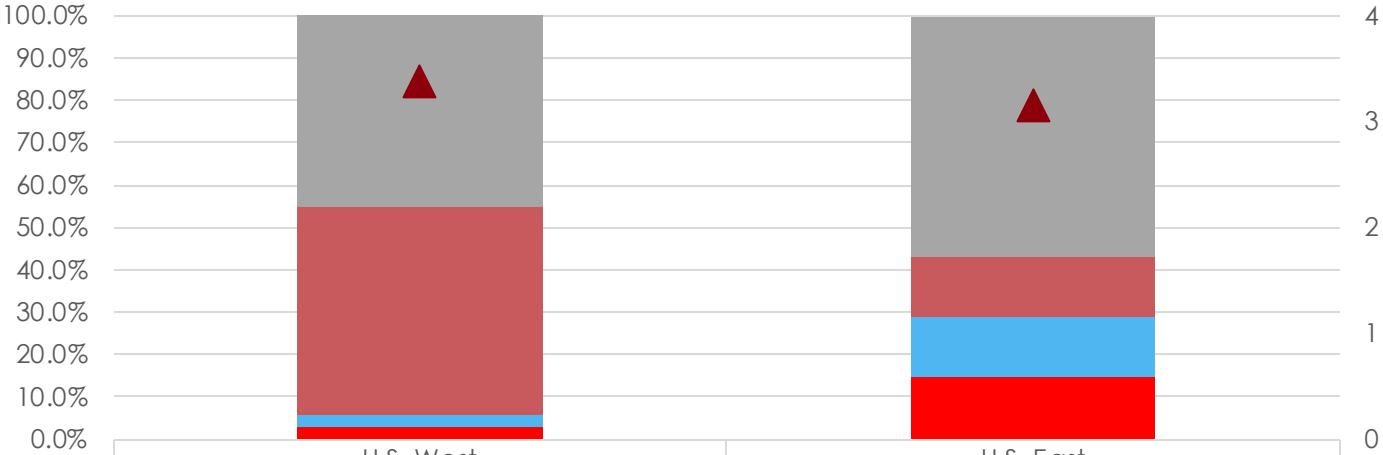
4-pt Rating Scale
 4=V ery Satisfied / 1=V ery Dissatisfied



	U.S. West	U.S. East
Very satisfied	51.0%	46.0%
Somewhat satisfied	33.0%	30.7%
Somewhat dissatisfied	12.8%	7.7%
Very dissatisfied	3.2%	15.6%
BASE	31	13
MEAN	3.32	3.07

SATISFACTION – DINING

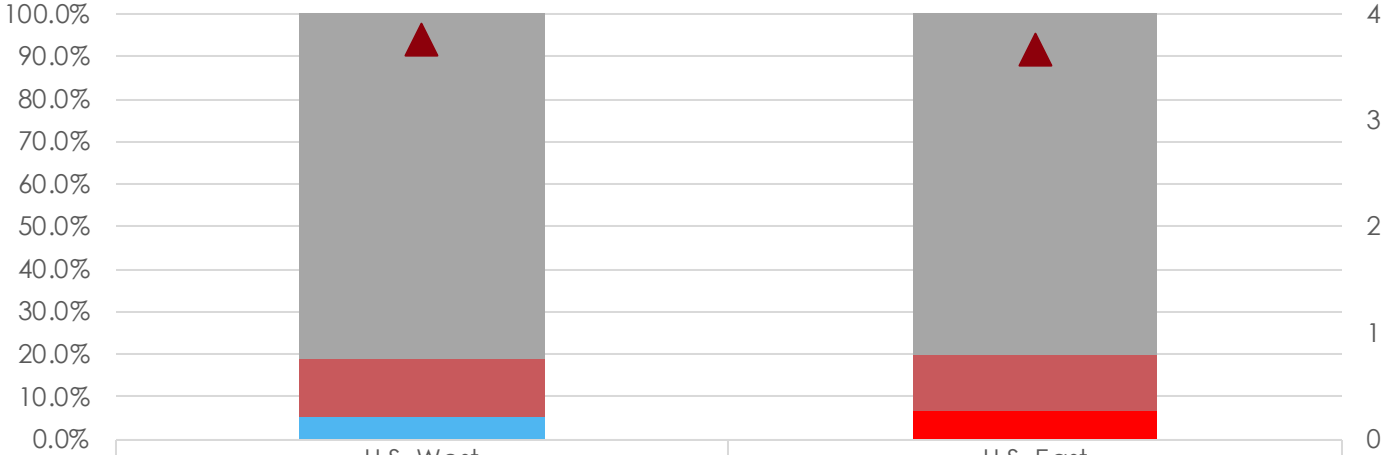
4-pt Rating Scale
 4=Very Satisfied / 1=Very Dissatisfied



	U.S. West	U.S. East
■ Very satisfied	45.3%	57.0%
■ Somewhat satisfied	49.1%	14.2%
■ Somewhat dissatisfied	2.8%	14.2%
■ Very dissatisfied	2.8%	14.5%
BASE	35	14
▲ MEAN	3.37	3.14

SATISFACTION – BEACHES

4-pt Rating Scale
 4=Very Satisfied / 1=Very Dissatisfied

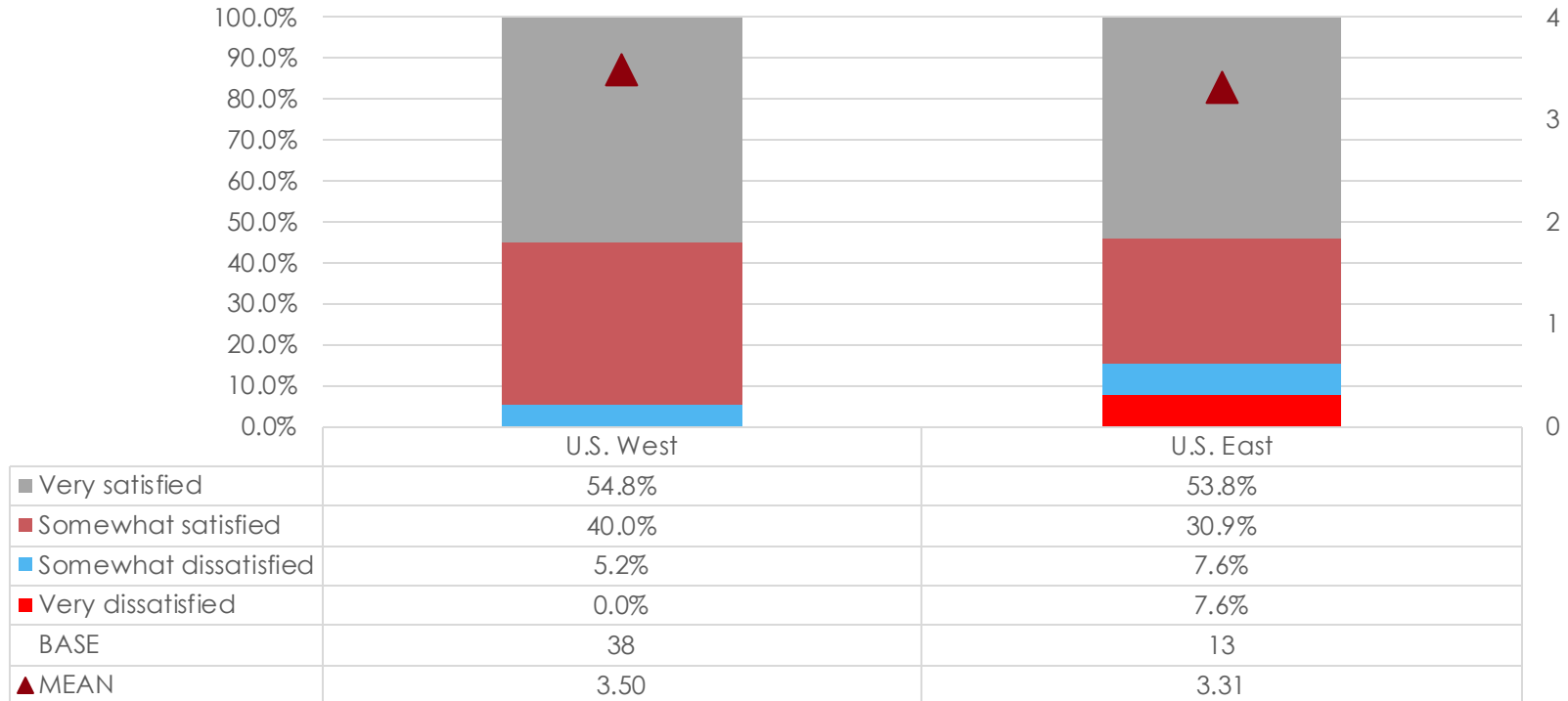


	U.S. West	U.S. East
■ Very satisfied	81.3%	80.1%
■ Somewhat satisfied	13.6%	13.3%
■ Somewhat dissatisfied	5.1%	0.0%
■ Very dissatisfied	0.0%	6.6%
BASE	39	15
▲ MEAN	3.76	3.67



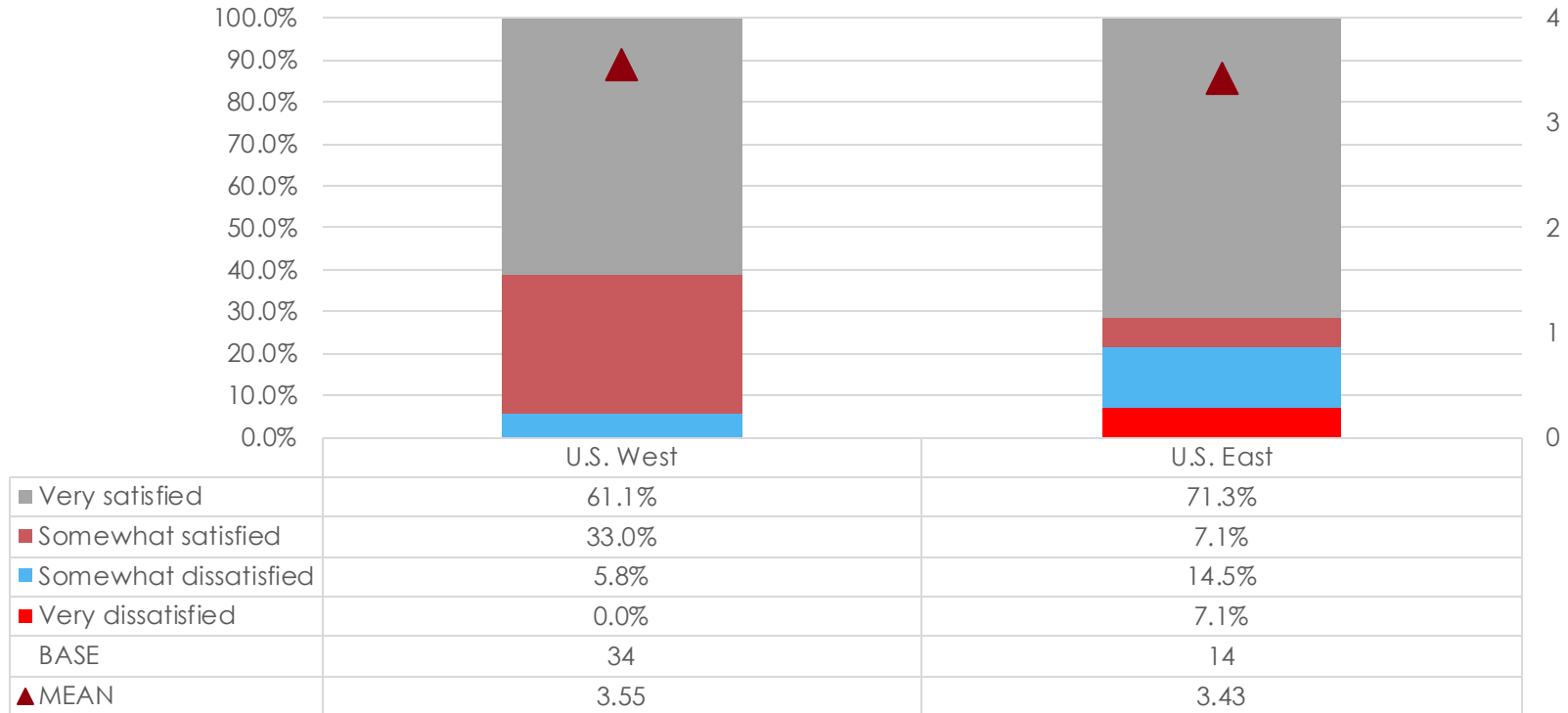
SATISFACTION – PUBLIC AREAS

4-pt Rating Scale
4=V ery Satisfied / 1=V ery Dissatisfied



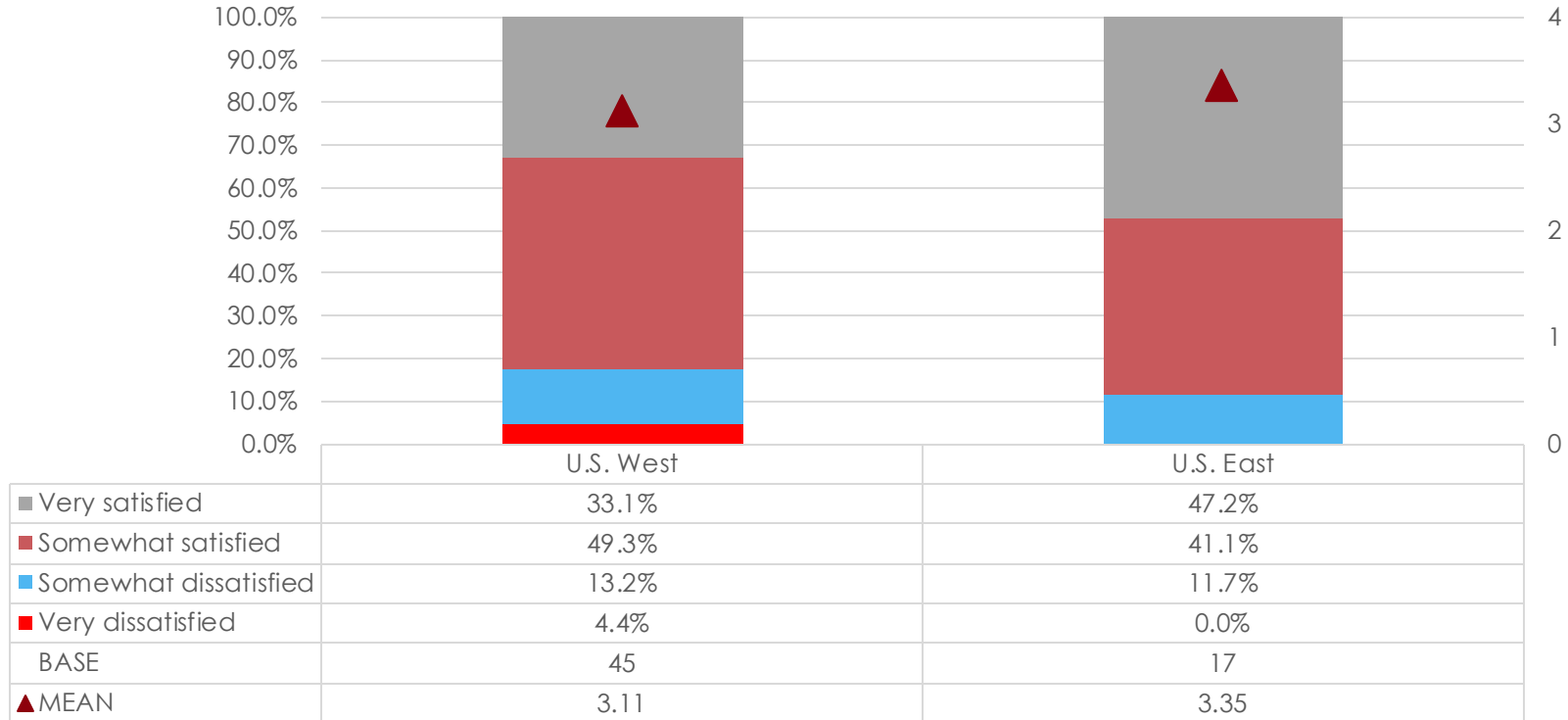
SATISFACTION – PARKS

4-pt Rating Scale
4=Very Satisfied / 1=Very Dissatisfied



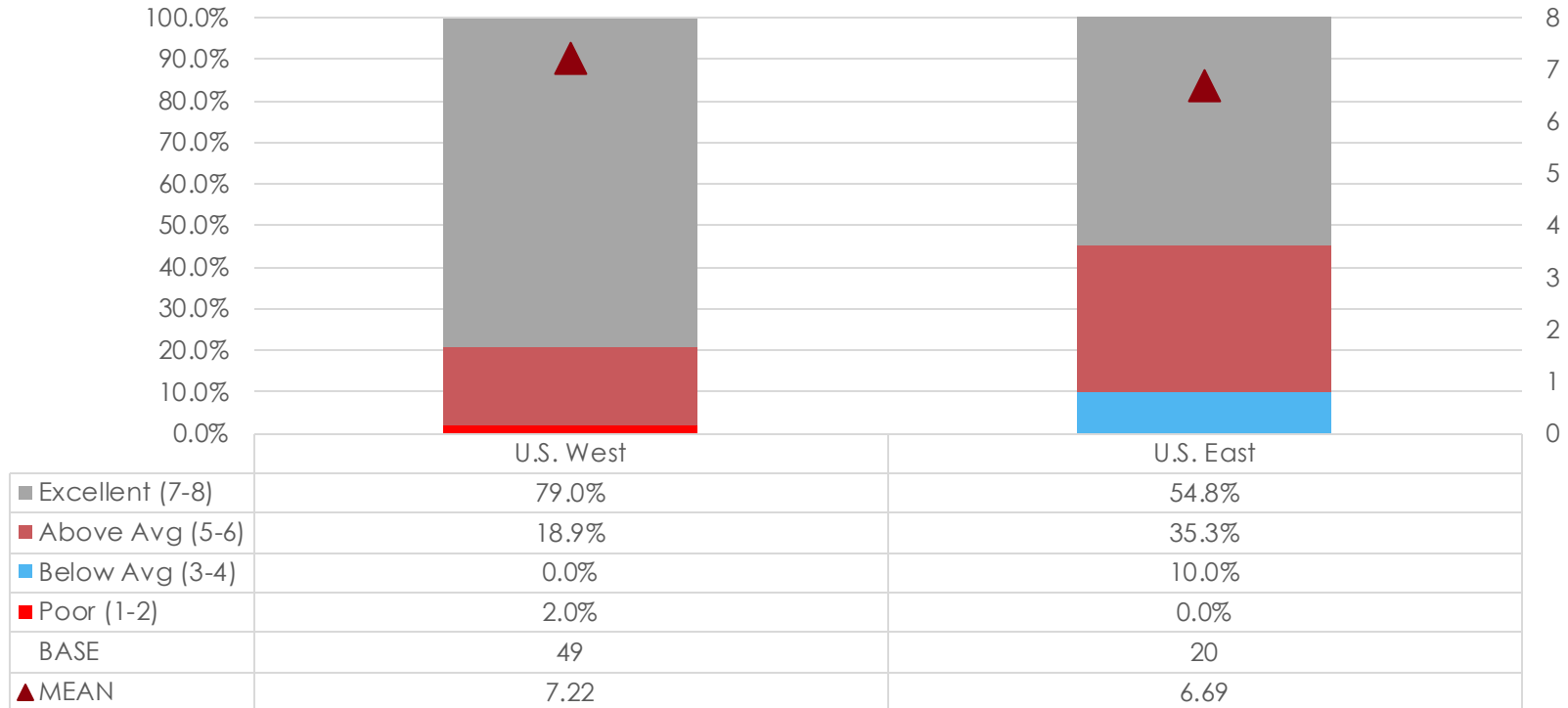
SATISFACTION – ROADS

4-pt Rating Scale
4=Very Satisfied / 1=Very Dissatisfied



FRIENDLINESS OF KAUA'I RESIDENTS

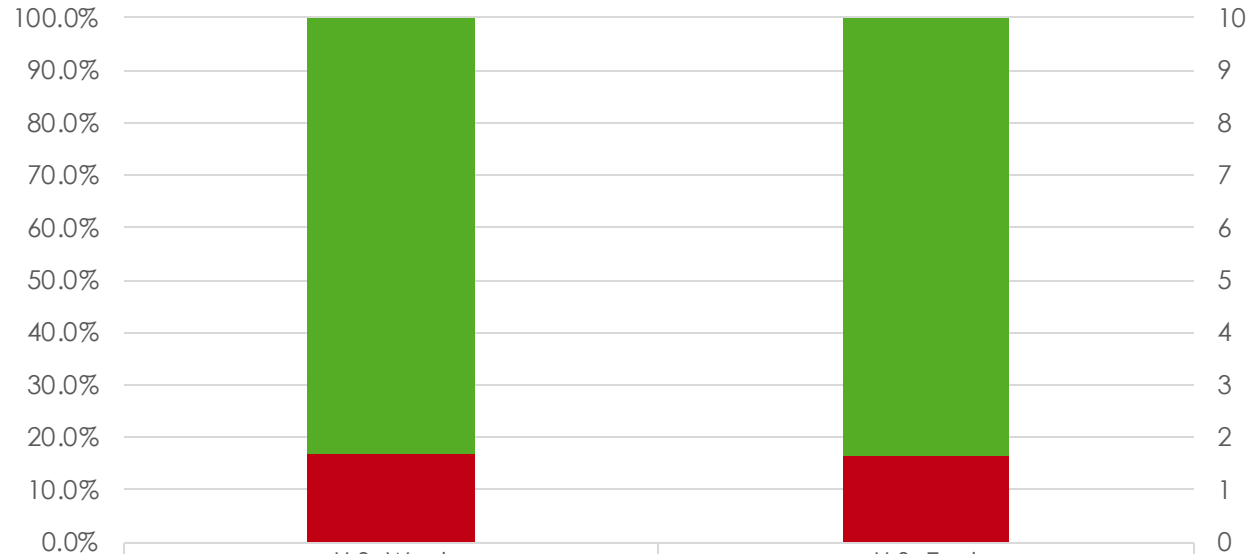
8-pt Rating Scale
8=Excellent / 1=Poor



TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
Been here before	48.6%	24.9%
Visiting Family/ Friends	22.3%	14.9%
Friend recommendation	14.9%	35.3%
Business related	6.1%	10.0%
Have timeshare/Have property/Renting	6.1%	0.0%
Travel Agent	2.0%	0.0%
Want to visit/Love Kauai/Favorite island	0.0%	5.0%
Less crowds	0.0%	5.0%

SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	83.3%	83.4%
■ Full-face snorkel mask	16.7%	16.6%
■ Unsure	0.0%	0.0%
BASE	18	6

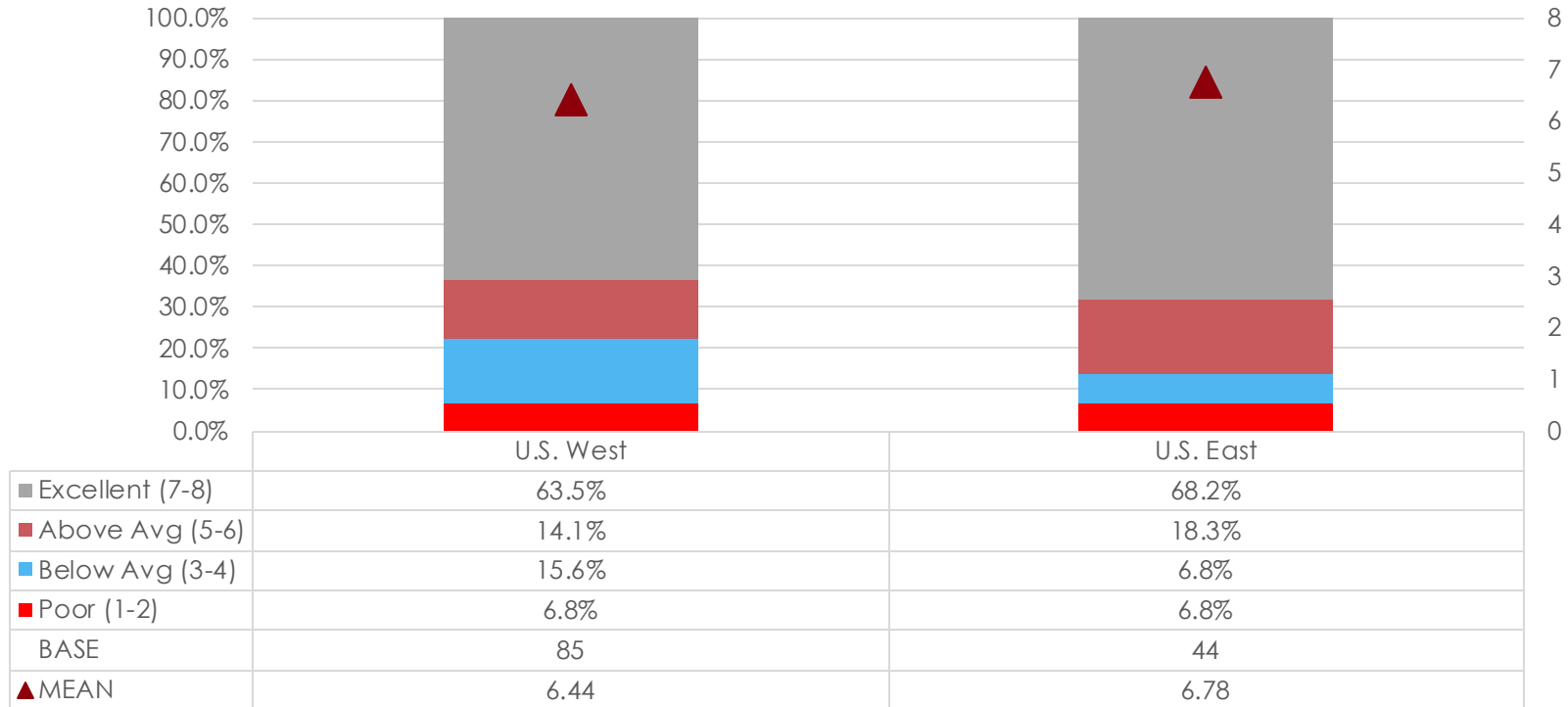
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
Did not have to be assisted or rescued	100.0%	83.4%
Yes, needed assistance – using 2-piece mask & snorkel	0.0%	16.6%
BASE	18	6

SECTION – MAUI

SATISFACTION – MAUI

8-pt Rating Scale
8=Excellent / 1=Poor

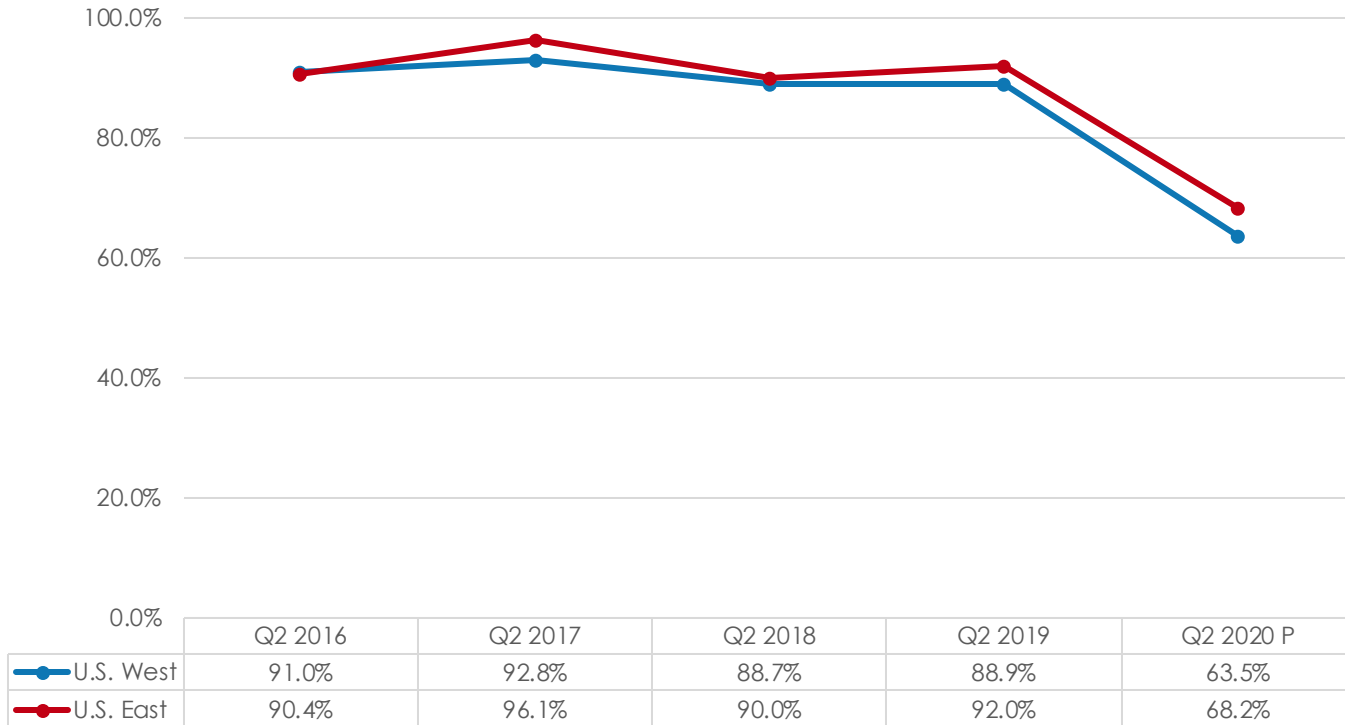


SATISFACTION – MAUI

- **Age:** Younger travelers from U.S West or those under the age of 35 were the most satisfied with their stay compared to visitor from other age group.
- **Travel party size:** Those traveling alone to Maui from U.S. West had the highest overall satisfaction scores compared to those traveling with other persons.

SATISFACTION – MAUI

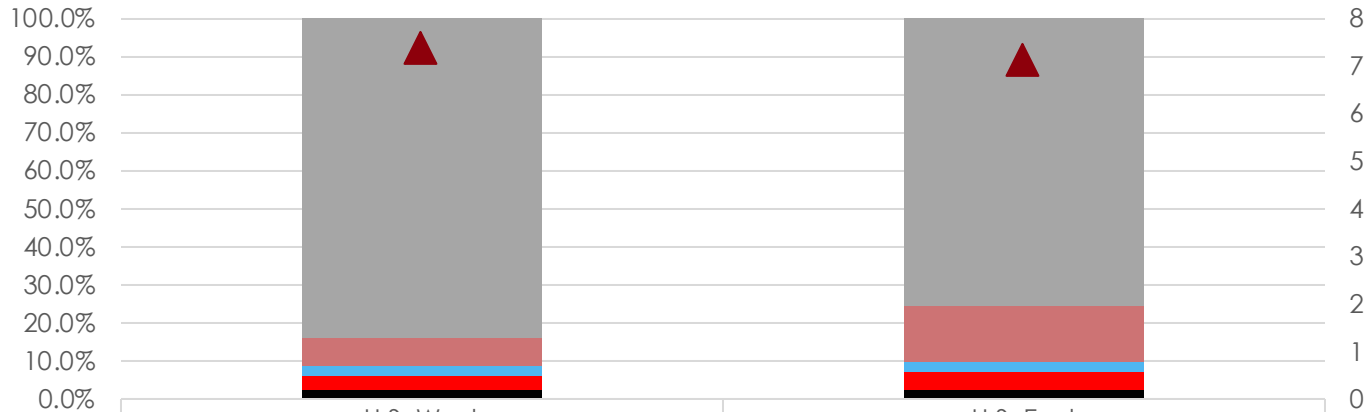
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – MAUI

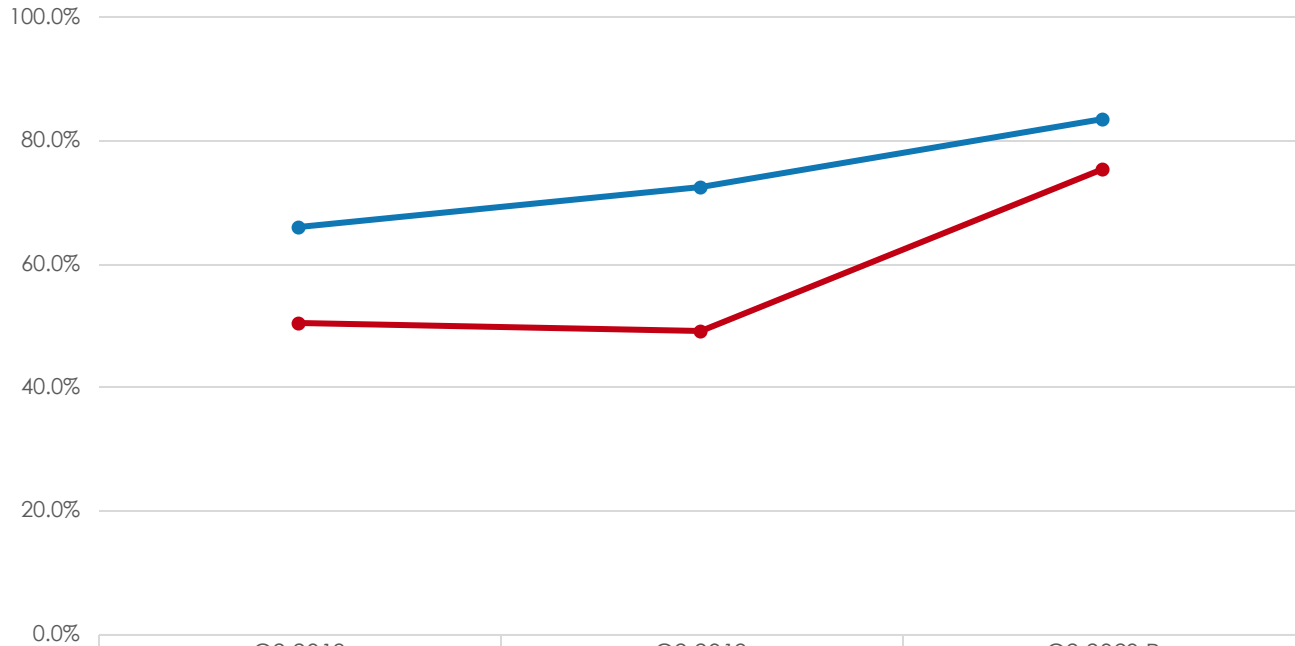
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	83.6%	75.6%
■ Somewhat likely (5-6)	7.8%	14.6%
■ Somewhat unlikely (3-4)	2.3%	2.5%
■ Very unlikely (1-2)	3.5%	4.8%
■ Not sure	2.7%	2.5%
BASE	83	41
▲ MEAN	7.38	7.15

LIKELIHOOD OF RETURN VISIT – MAUI

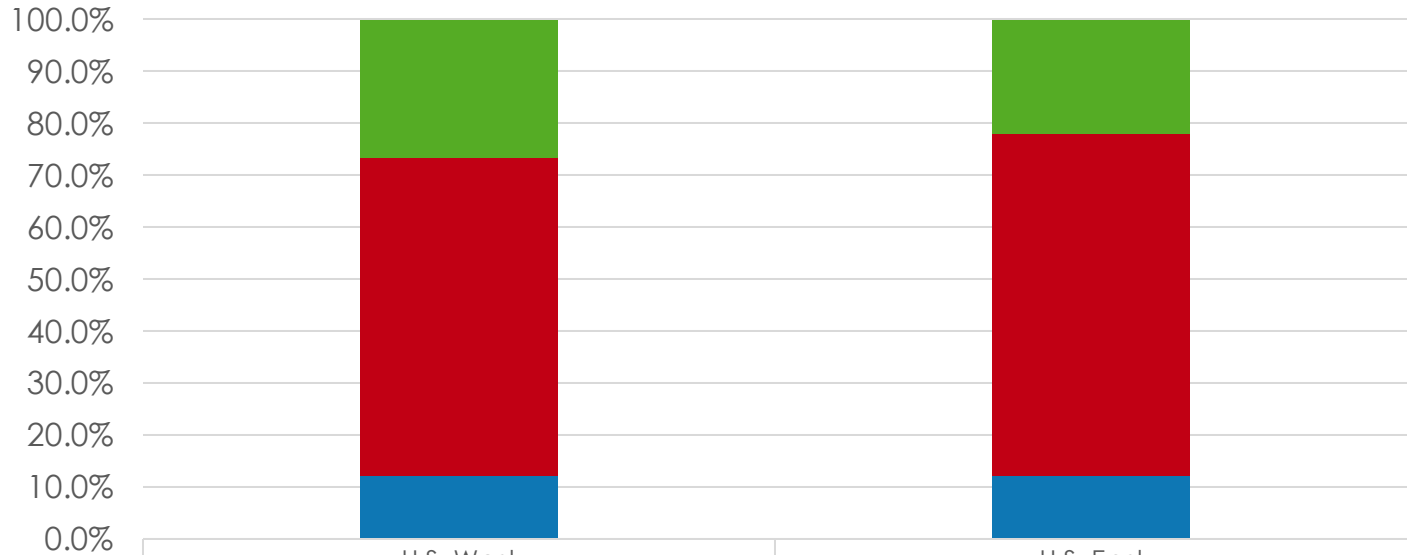
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P
U.S. West	66.1%	72.7%	83.6%
U.S. East	50.4%	49.3%	75.6%

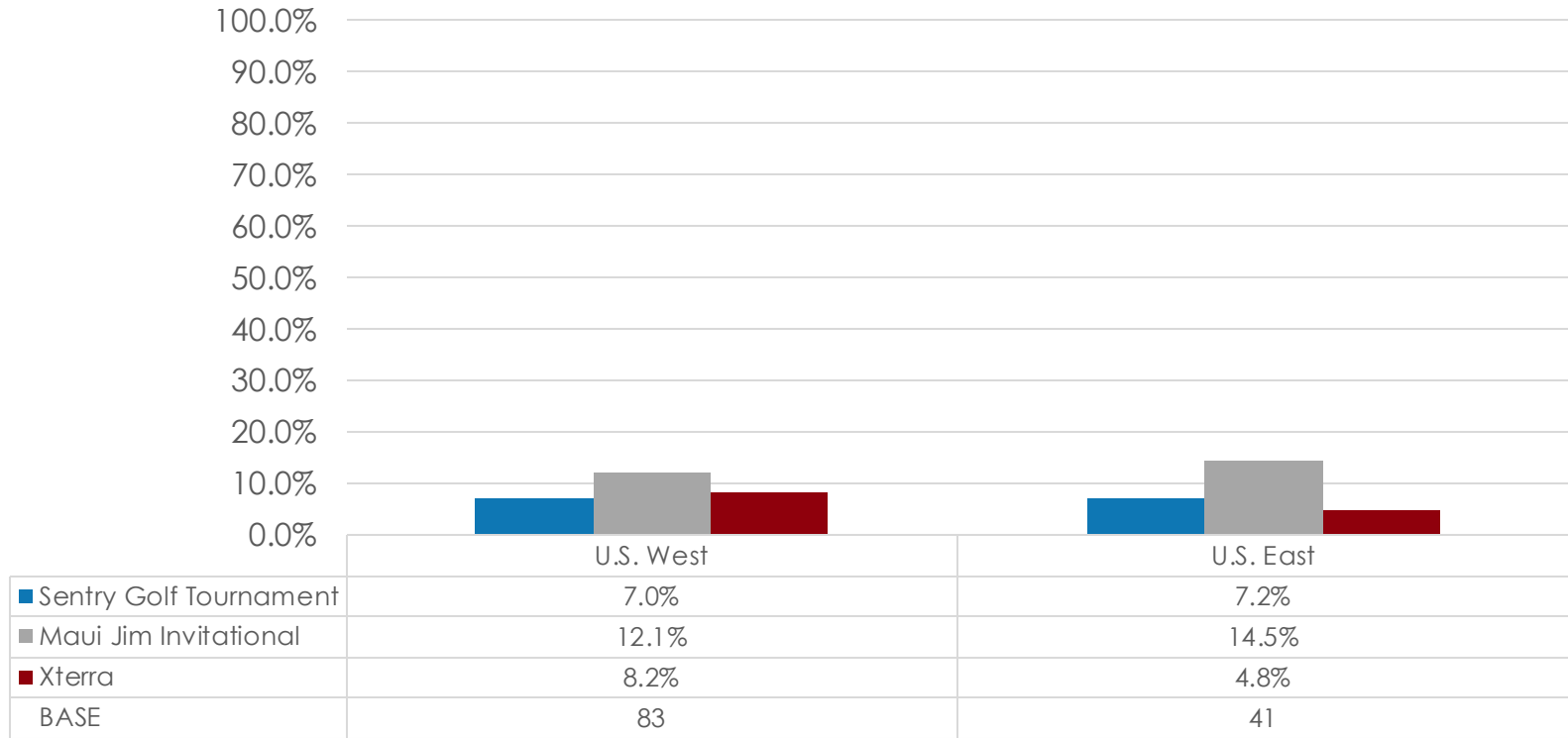
P= Preliminary Data

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	26.6%	22.1%
■ No Prior Awareness	61.3%	65.6%
■ Unsure	12.1%	12.3%
BASE	83	41

AIDED ADVERTISING AWARENESS – MAUI EVENTS



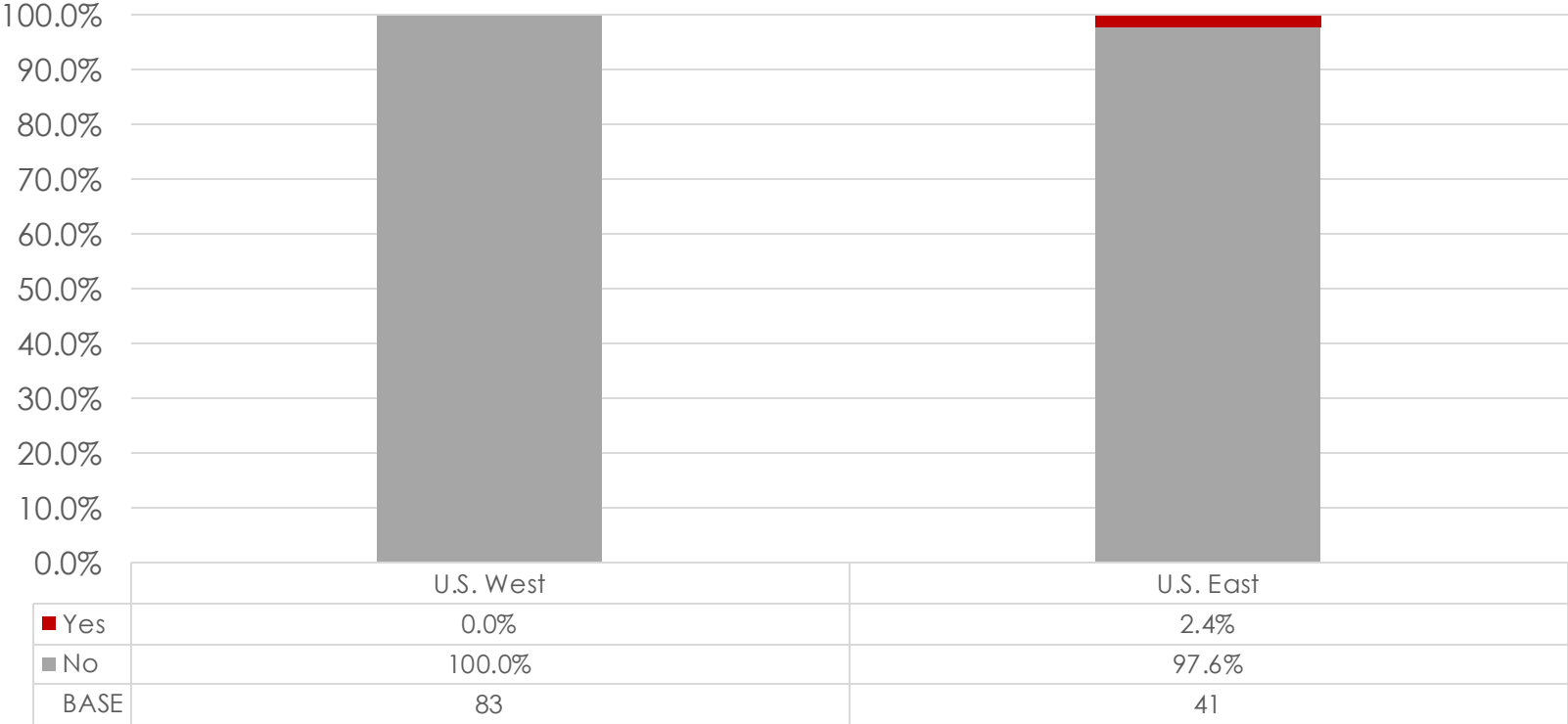
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
None of these	86.0%	90.2%
Hawaiian cultural events	8.2%	7.4%
Outdoor or sporting activities and events	9.4%	4.9%
Social media posts and videos	4.7%	2.5%
Hawaiian Music	5.9%	2.5%
TV programs/ Movies filmed in Hawai'i	0.0%	4.9%

ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	1.2%	5.2%
Aquarium Maui / Maui Ocean Center	3.6%	7.7%
Baldwin Missionary Home Museum	2.4%	0.0%
Hale Pa'i Printing House	1.2%	0.0%
Haleakala National Park	17.8%	30.9%
Haleki'i-Pihana Heiau State Monument	1.6%	0.0%
Hana Cultural Center	3.6%	2.5%
'Iao Valley State Monument	13.8%	12.9%
Kepaniwai Park & Heritage Gardens	1.2%	0.0%
Kula Botanical Garden	6.1%	7.8%
Maui Historical Society Bailey House Museum	0.0%	2.5%
Whaler's Village Museum	1.2%	2.5%
Wo Hing Temple Museum	1.2%	0.0%

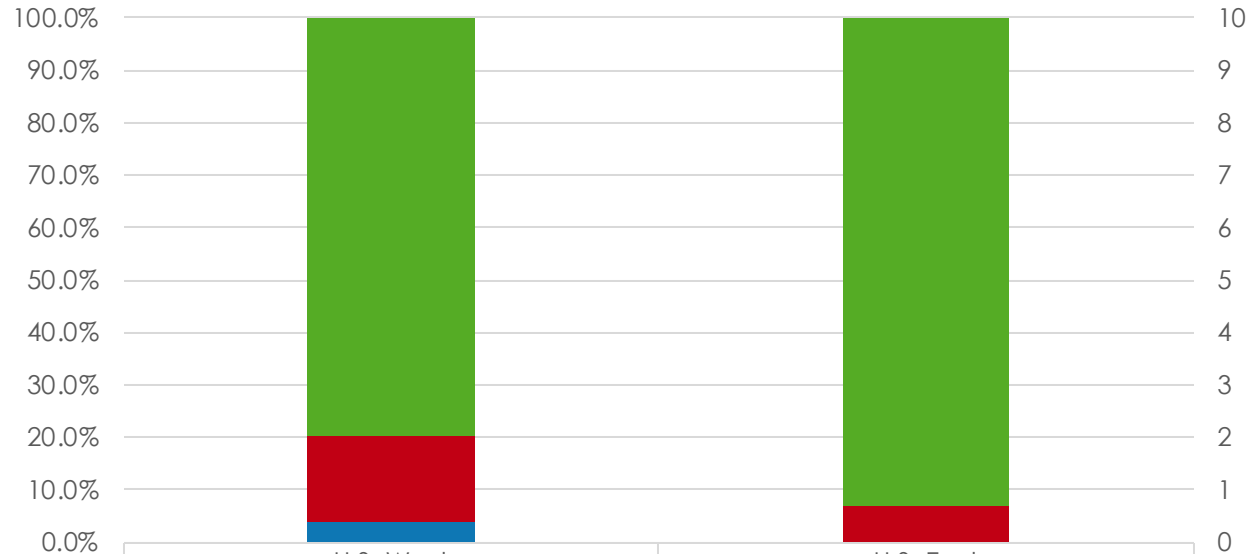
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	0.0%	100.0%

SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	79.7%	93.0%
■ Full-face snorkel mask	16.5%	7.0%
■ Goggle/ Mask, no snorkel	3.8%	0.0%
BASE	25	14

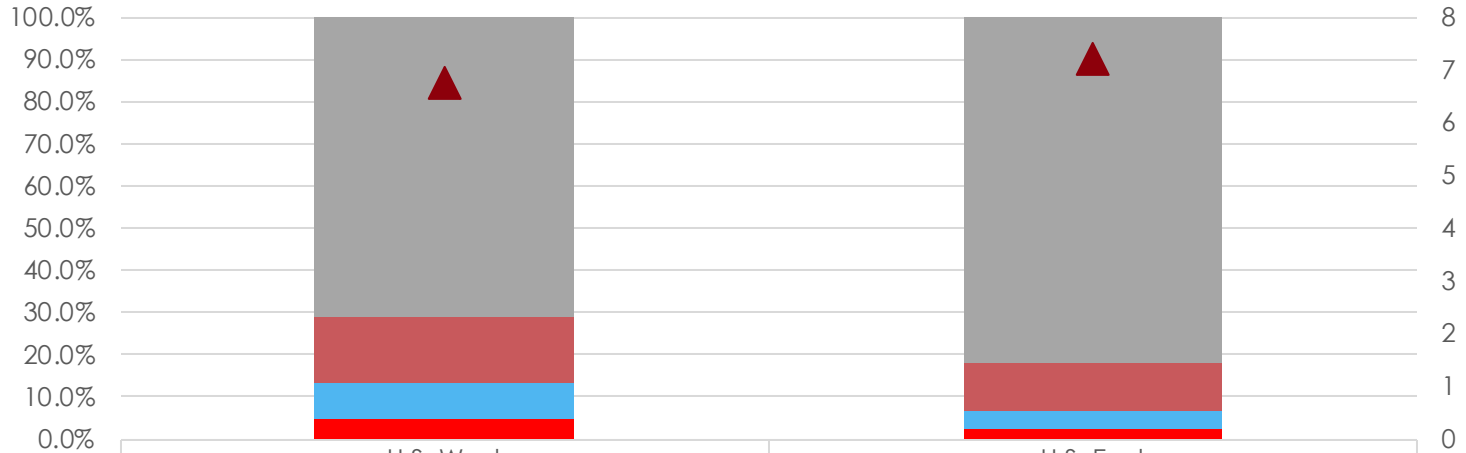
SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
Did not have to be assisted or rescued	100.0%	100.0%
BASE	25	14

SECTION – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

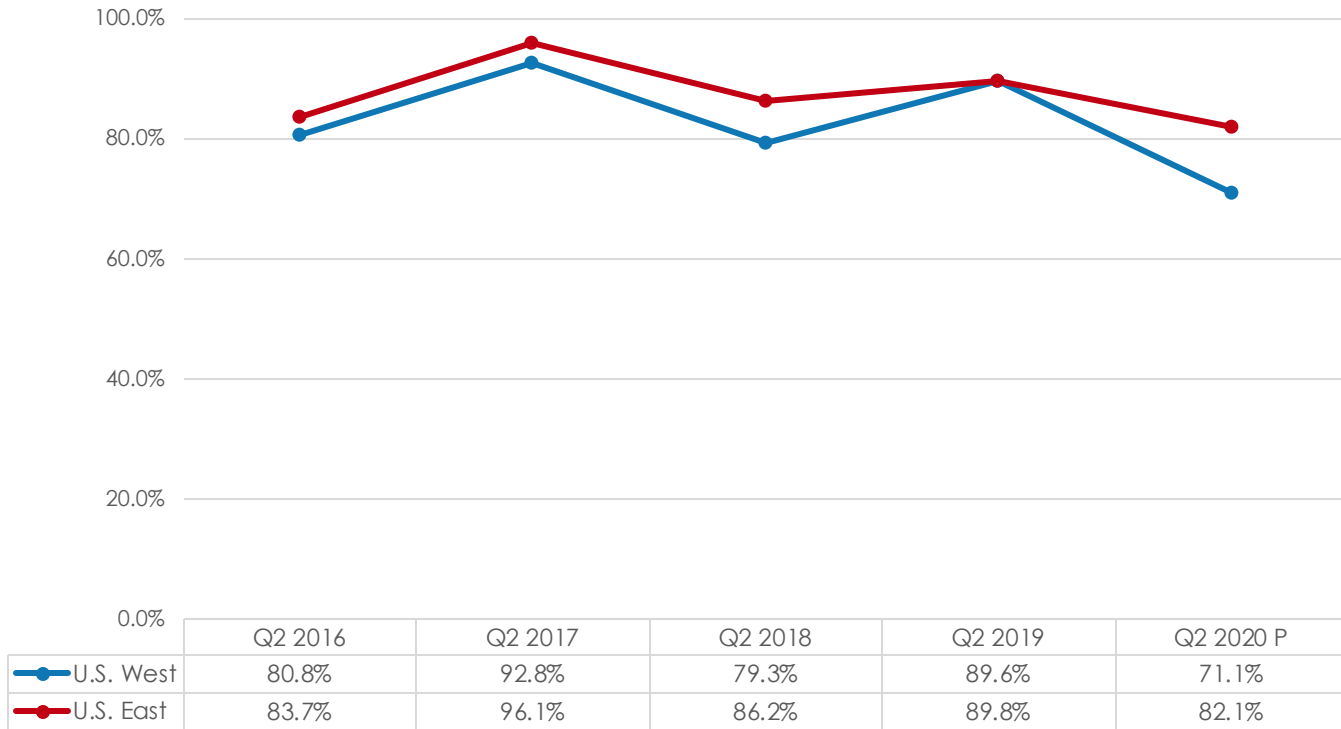
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	71.1%	82.1%
■ Above Avg (5-6)	15.6%	11.2%
■ Below Avg (3-4)	8.8%	4.5%
■ Poor (1-2)	4.6%	2.2%
BASE	99	45
▲ MEAN	6.78	7.24

SATISFACTION – ISLAND OF HAWAII

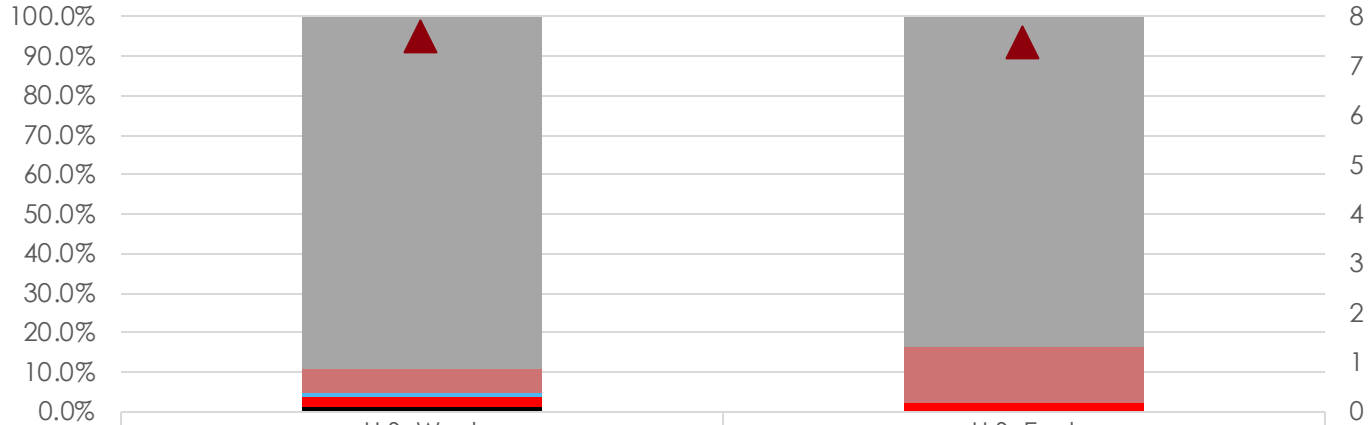
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAII

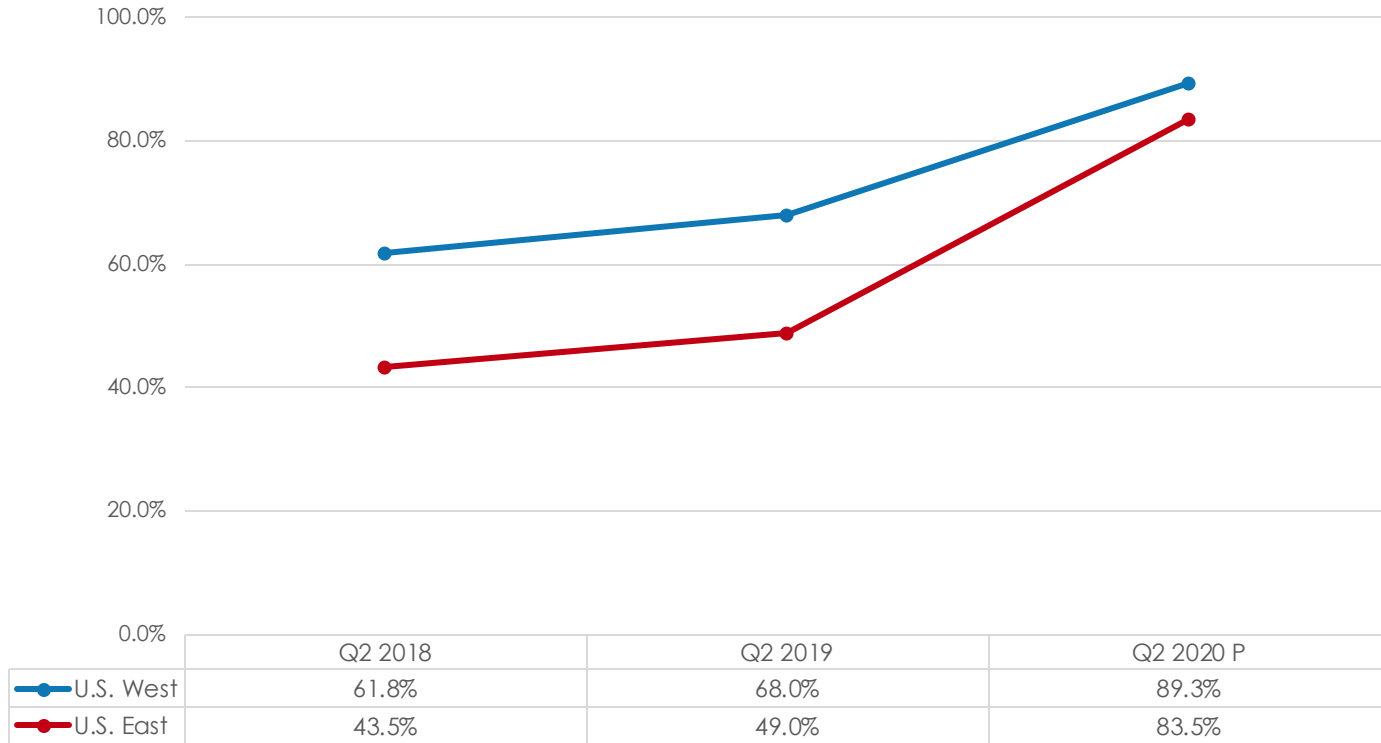
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	89.3%	83.5%
■ Somewhat likely (5-6)	6.0%	14.1%
■ Somewhat unlikely (3-4)	1.0%	0.0%
■ Very unlikely (1-2)	2.3%	2.4%
■ Not sure	1.3%	0.0%
BASE	96	43
▲ MEAN	7.61	7.48

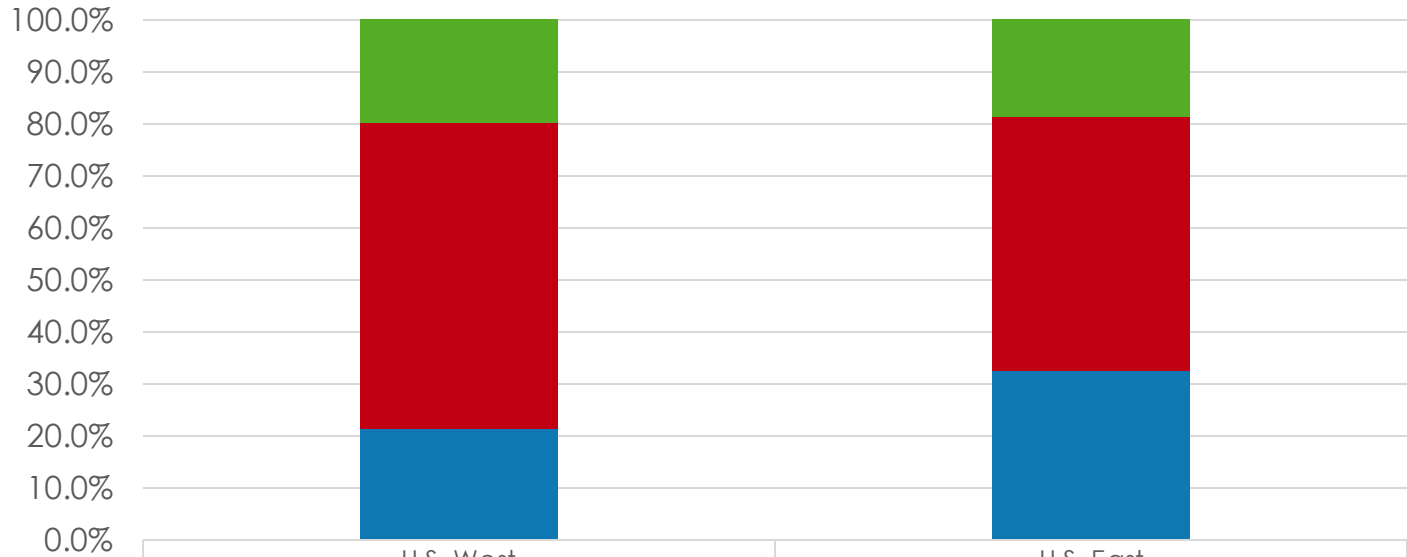
LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAII

TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	19.7%	18.6%
■ No Prior Awareness	58.9%	49.0%
■ Unsure	21.4%	32.4%
BASE	96	43

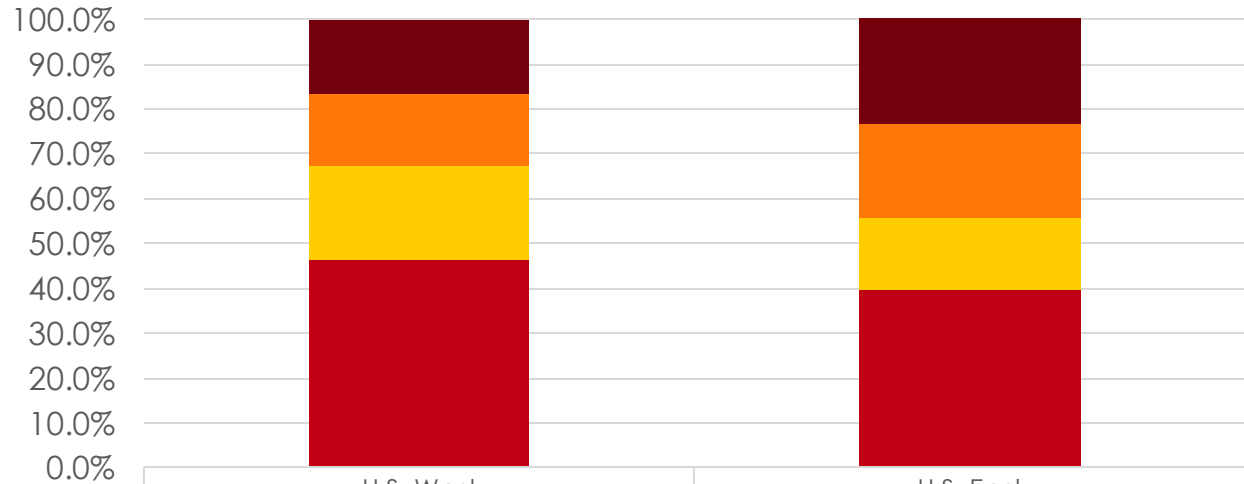
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
‘Akaka Falls	10.0%	9.6%
Botanical Gardens	4.5%	14.4%
H.N. Greenwell Store	0.0%	4.7%
Hawai‘i Volcanoes National Park	15.9%	21.5%
Hilo Farmers Market	18.0%	40.5%
Hulihe‘e Palace	0.0%	2.5%
‘Imiloa Astronomy Center	0.0%	0.0%
Kaloko-Honokohau National Historical Park	3.5%	2.5%
Kona Coffee Living History Farm	3.1%	2.4%
Lili‘uokalani Park and Garden	6.6%	11.9%

ATTRACTIONS – ISLAND OF HAWAI‘I (cont.)

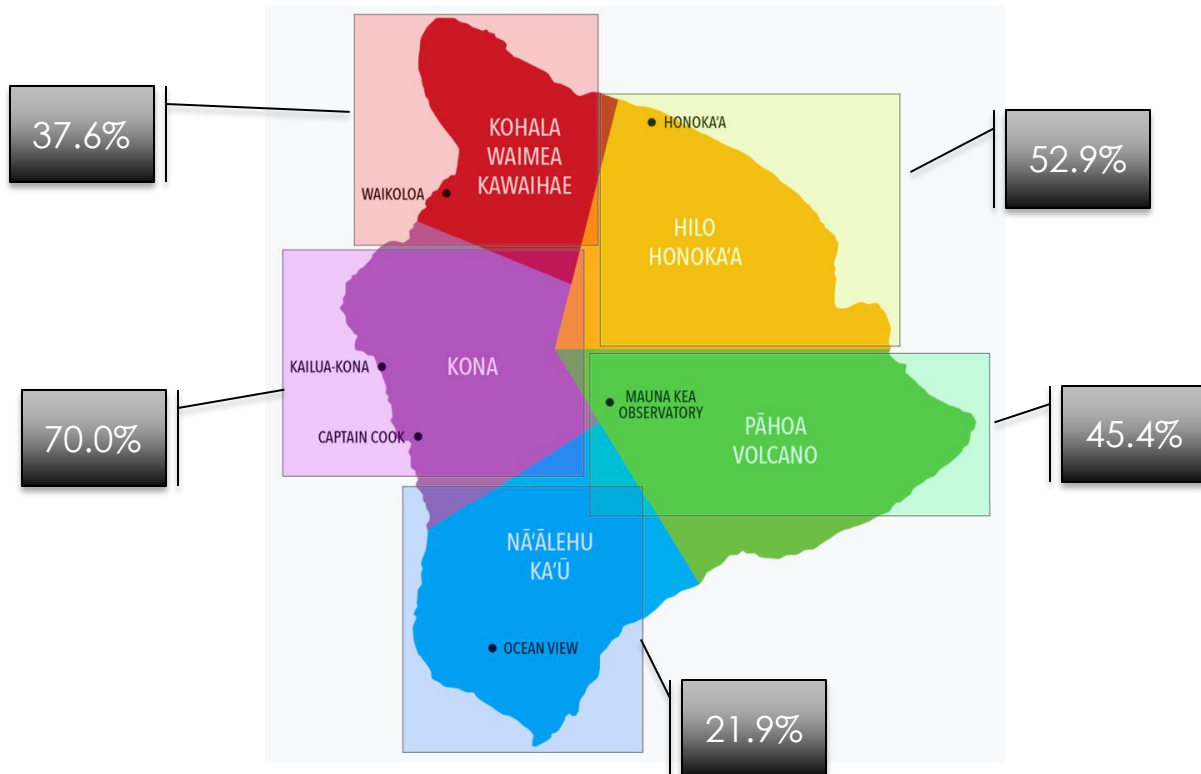
	U.S. West	U.S. East
Lyman House Memorial Museum	1.0%	2.5%
Maunakea	10.7%	23.9%
Orchid Farm	2.1%	0.0%
Pacific Tsunami Museum	1.0%	4.8%
Pana‘ewa Rainforest Zoo & Garden	1.0%	0.0%
Pu‘uhonua o Honaunau National Historical Park	6.9%	9.6%
Pu‘ukohola Heia National Historical Site	0.0%	4.7%
Punalu‘u Black Sand Beach	15.2%	21.5%
Rainbow Falls	9.0%	14.4%
Volcano Art Center	3.1%	7.2%

TRAVEL ON ISLAND OF HAWAI'I

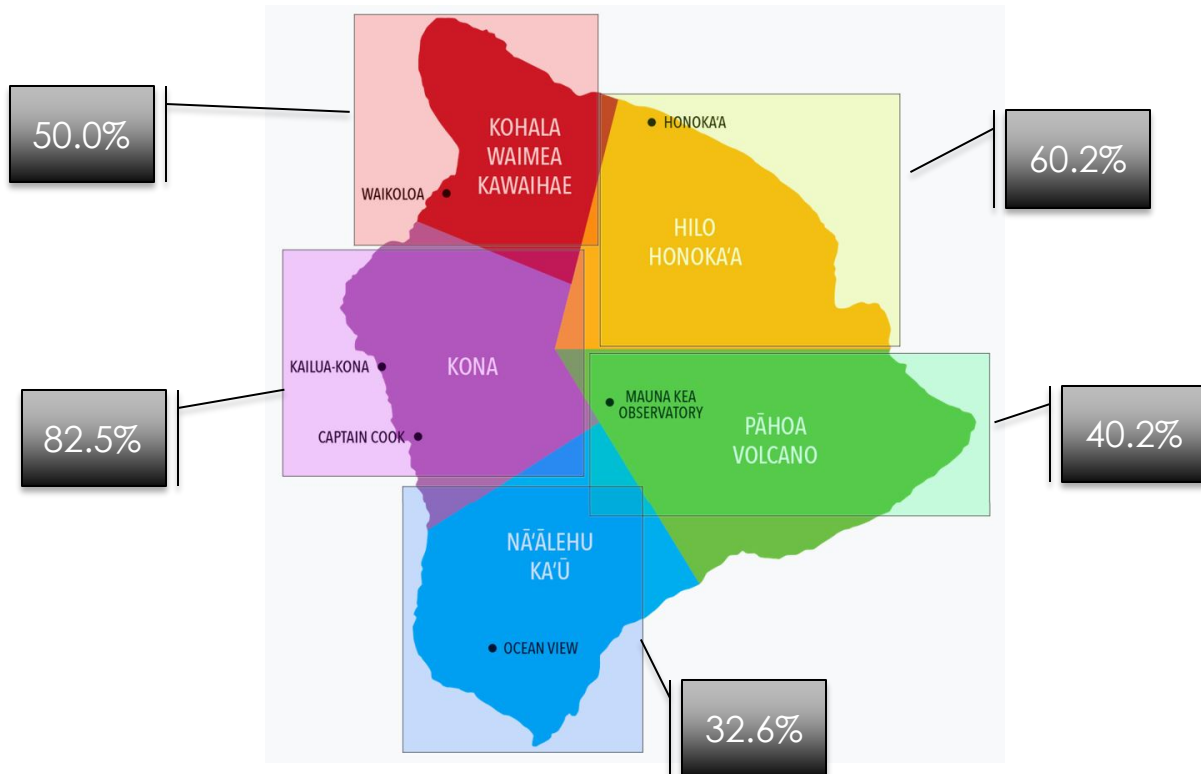


	U.S. West	U.S. East
■ Traveled to other side of island	16.7%	23.4%
■ Traveled more than 1 hour	16.1%	20.9%
■ Traveled 1 hour or less one way to reach activity	21.0%	16.2%
■ Enjoy activities- short drive from accommodations	46.2%	39.6%
● BASE	96	43

AREAS VISITED U.S. WEST



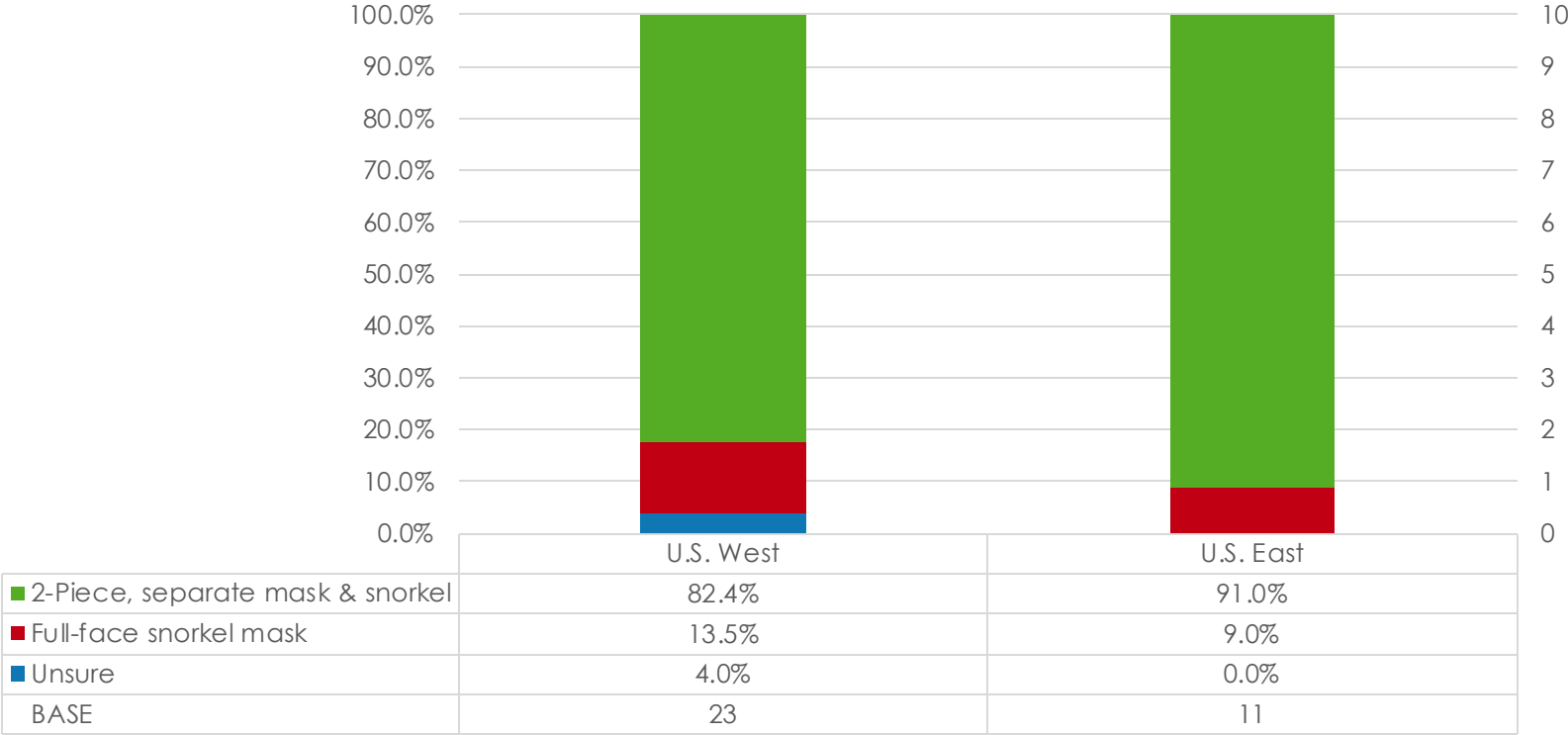
AREAS VISITED U.S. EAST



103 Q Which of the following areas did you visit during your stay on Hawai'i Island?

[A]

SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I

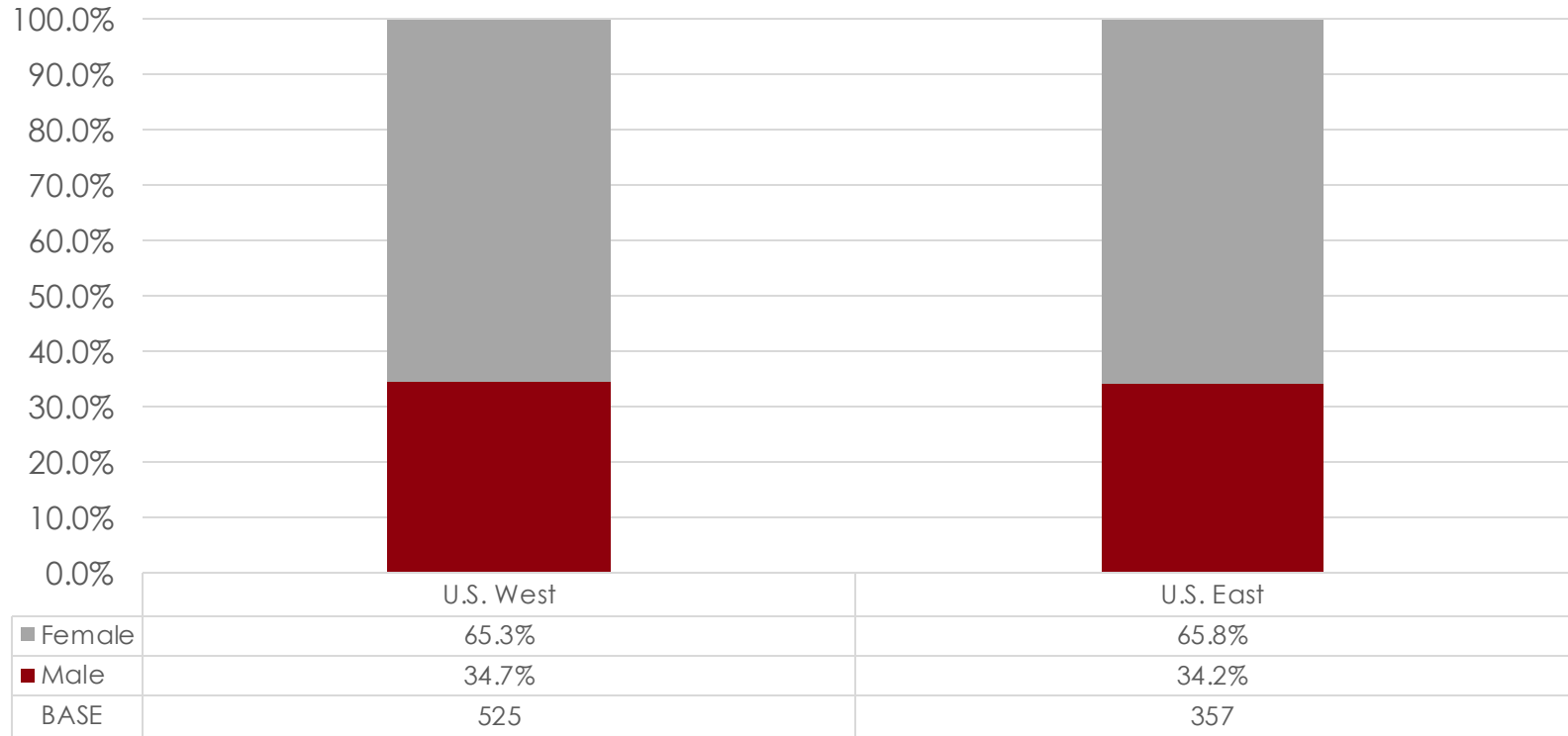


SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

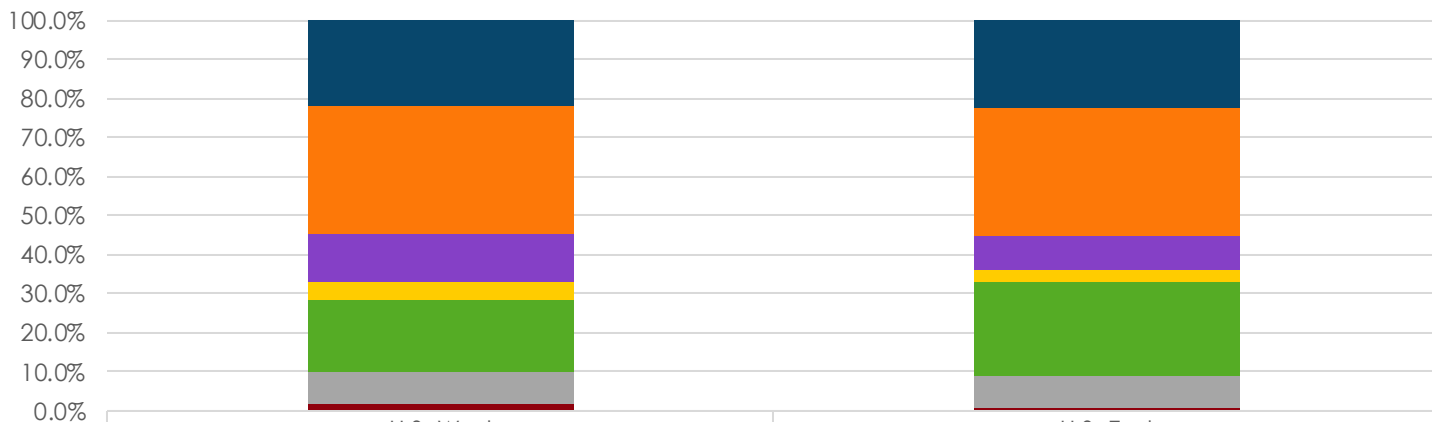
	U.S. West	U.S. East
Did not have to be assisted or rescued	100.0%	91.0%
Yes, needed assistance – using full-face mask	0.0%	9.0%
BASE	23	11

SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION

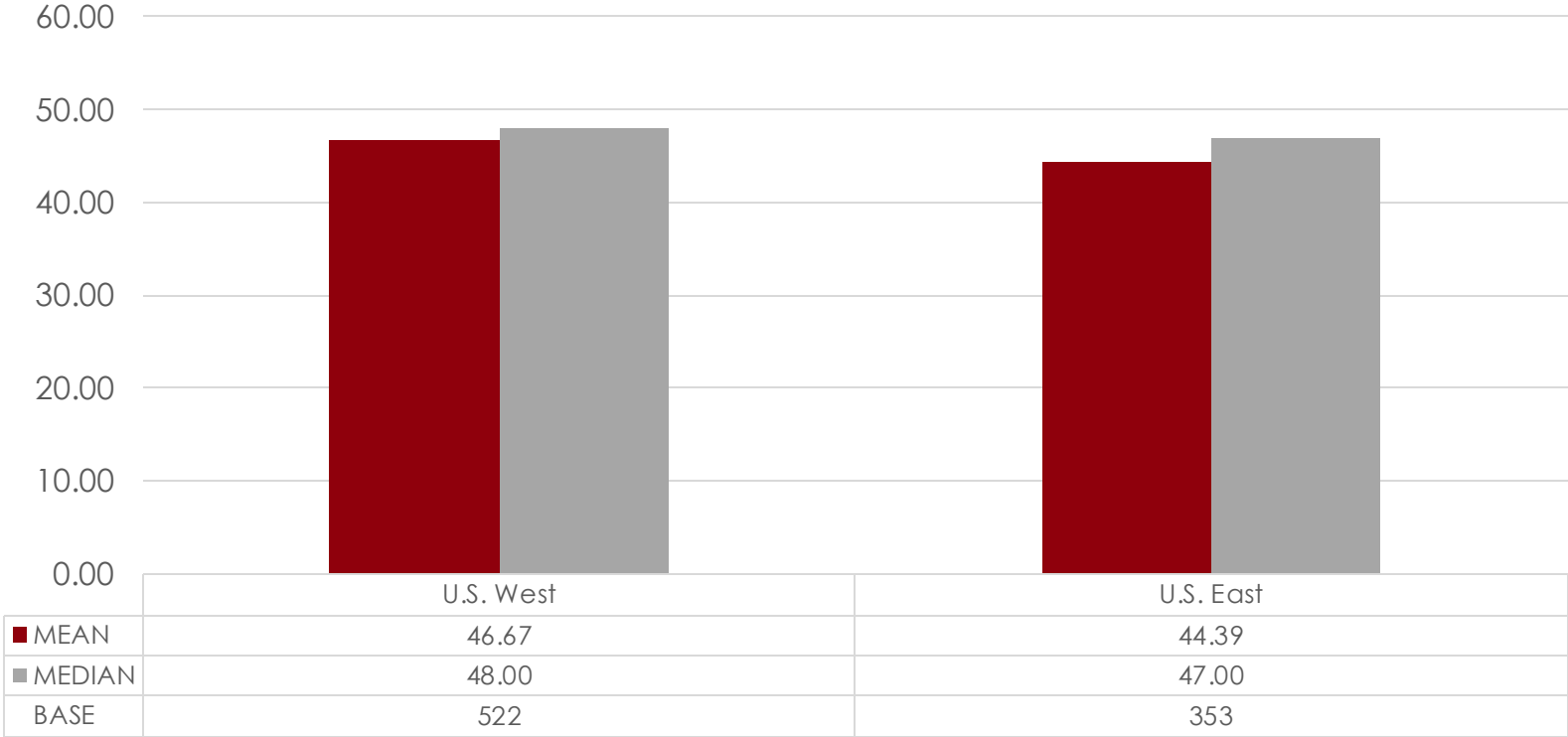


	U.S. West	U.S. East
■ Post-Graduate	21.9%	22.6%
■ College Grad	32.7%	32.8%
■ Associate Degree	12.6%	8.7%
■ Vocational/ Tech	4.7%	2.9%
■ Some College	18.1%	23.9%
■ H.S. Grad	8.2%	8.6%
■ Some / No H.S.	1.9%	0.6%
BASE	523	353

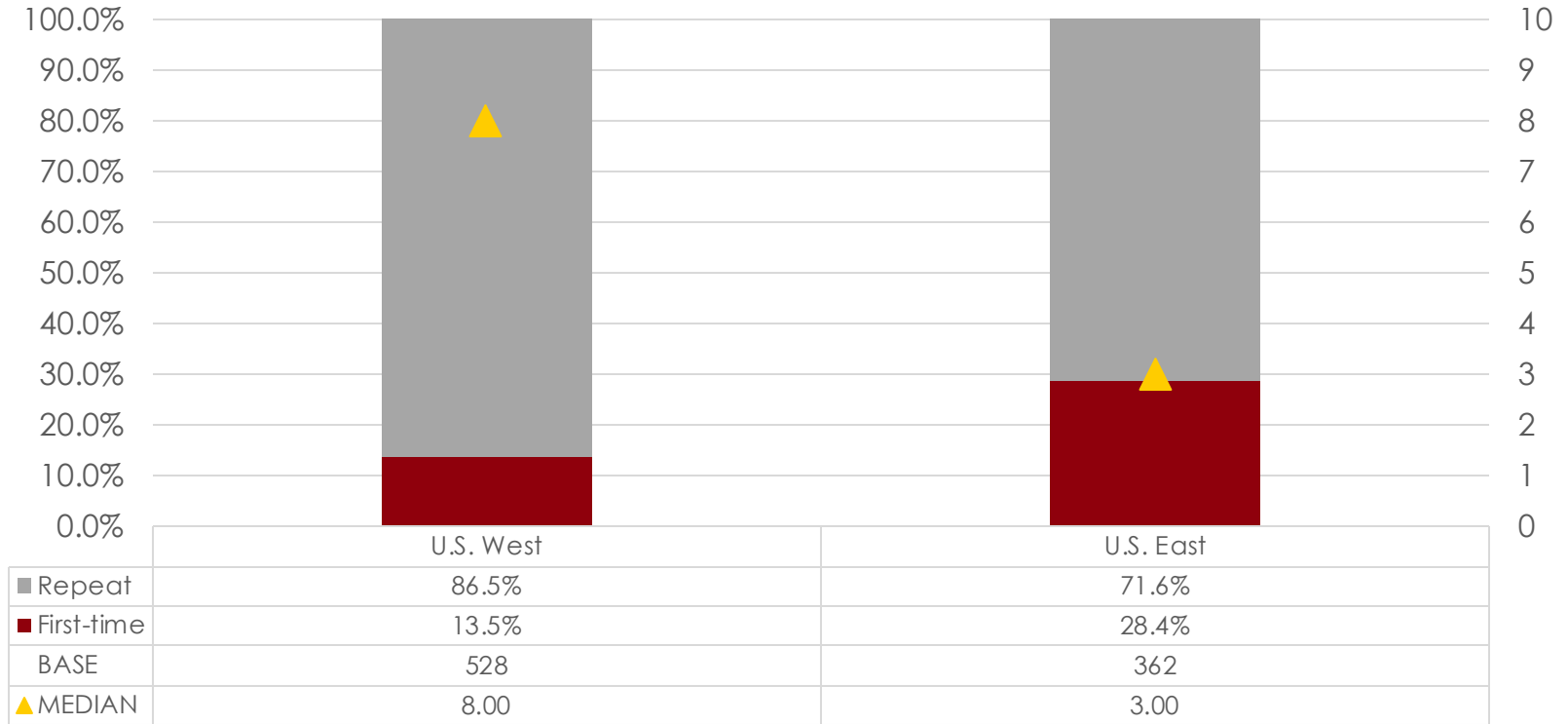
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	14.9%	16.8%
\$40,000 to \$59,999	9.5%	12.6%
\$60,000 to \$79,999	12.2%	16.1%
\$80,000 to \$99,999	12.8%	10.7%
\$100,000 to \$124,999	12.0%	13.5%
\$125,000 to \$149,999	8.7%	10.7%
\$150,000 to \$174,999	8.1%	3.8%
\$175,000 to \$199,999	5.1%	3.2%
\$200,000 to \$249,999	6.0%	4.7%
\$250,000 +	10.6%	7.8%

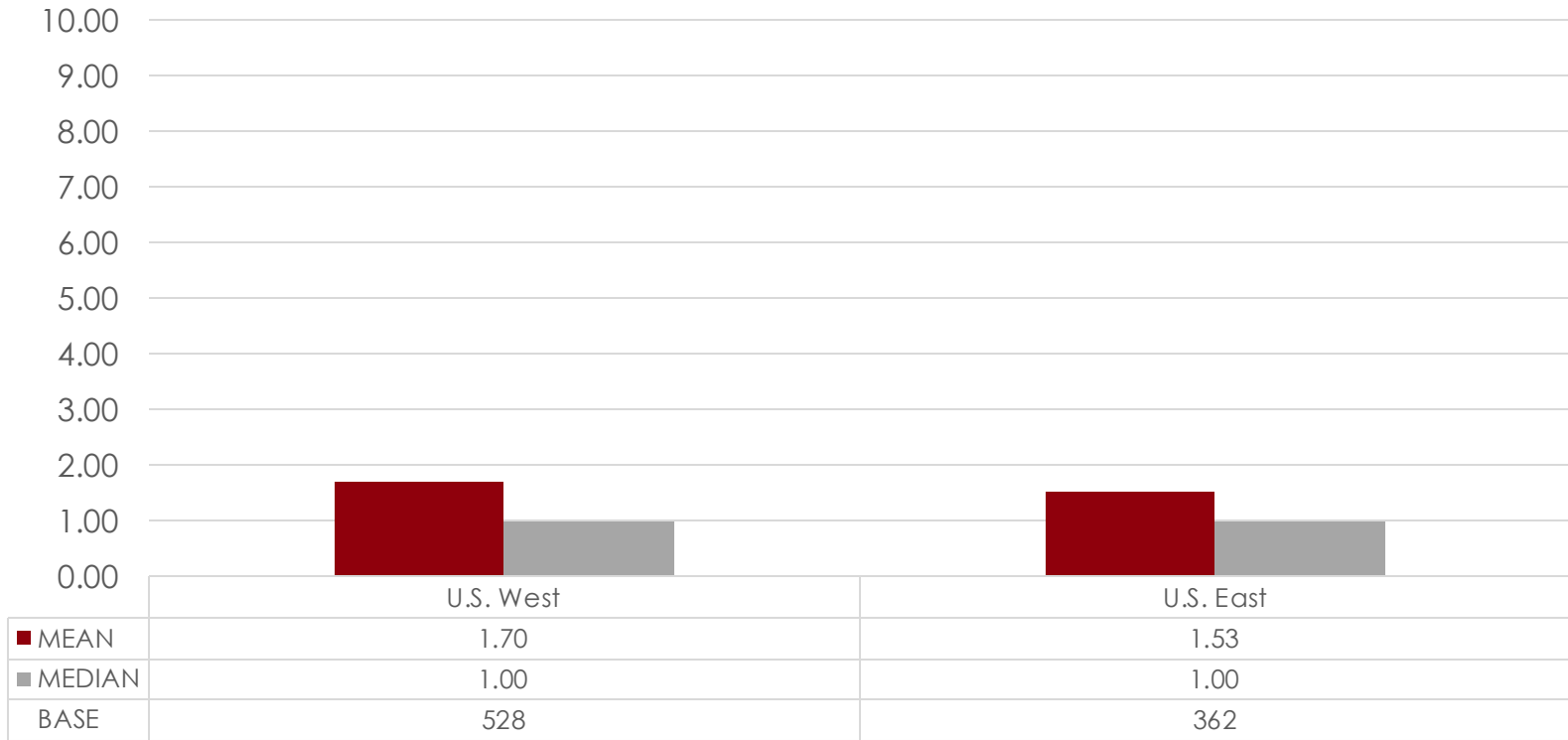
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAII



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
Spouse	20.0%	13.8%
Other adult family	8.8%	7.7%
Friend/ Associate	7.6%	7.8%
Child <18	14.2%	10.7%
Alone	54.8%	63.0%
Girlfriend/ boyfriend	3.9%	3.9%
Same-sex partner	0.2%	0.0%

SECTION – ISLAND SURVEY METHODOLOGY

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (O‘AHU)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai‘i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarize the number of surveys completed for the island of O‘ahu.

MMA	Completed	Margin of Error
US West	328	+/- 5.41%
US East	276	+/- 5.90%
All MMAs	604	+/- 3.90%

*Margins of error are presented at the 95 percent level of confidence.

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (KAUA‘I)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai‘i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarizes the number of surveys completed for the island of Kaua‘i.

MMA	Completed	Margin of Error
US West	49	+/- 14.00%
US East	20	+/- 21.91%
All MMAs	69	+/- 11.80%

*Margins of error are presented at the 95 percent level of confidence.

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai'i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarizes the number of surveys completed for the island of Maui.

MMA	Completed	Margin of Error
US West	85	+/- 10.63%
US East	44	+/- 14.77%
All MMAs	129	+/- 8.63%

*Margins of error are presented at the 95 percent level of confidence.

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (ISLAND OF HAWAI'I)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai'i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarize the number of surveys completed for the island of Hawai'i.

MMA	Completed	Margin of Error
US West	99	+/- 9.85%
US East	45	+/- 14.61%
All MMAs	144	+/- 8.17%

*Margins of error are presented at the 95 percent level of confidence.