

VISITOR SATISFACTION STUDY Q3 2022

State of Hawai'i
Department of Business, Economic Development & Tourism

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Table of Contents

- Section 1 – Visitor Satisfaction
- Section 2 – Activities
- Section 3 – Travelers with Disabilities
- Section 4 – Alternative Messaging
- Section 5 – Island of O’ahu
- Section 6 – Island of Kaua’i
- Section 7 – Island of Maui
- Section 8 – Island of Hawai’i
- Section 9 – Visitor Profile
- Section 10 – Island Survey Methodology

Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 3, 2022 report included survey results from: 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, Oceania, Korea. Samples collected for China were too limited to report.

Visitor market	Completed	Margin of Error ±	Response Rate
U.S. West	1,641	2.42	15.79%
U.S. East	1,737	2.35	16.73%
Japan	113	9.22	15.19%
Canada	1,034	3.05	20.90%
Oceania	392	4.95	14.68%
Korea	190	7.11	31.88%
China	38	15.90	7.17%
All visitor markets	5,145	1.37	17.00%

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-Flight database. Selected U.S. visitors were sent an email invitation with a link to complete the survey online. Surveys were also conducted by trained interviewers with departing visitors from Korea at the Daniel K. Inouye Airport in Honolulu; as well as visitors from Japan at the Ellison Onizuka Kona International Airport on Hawai'i Island.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both visitor markets were reported as weighted data based on weights generated for Quarter 3, 2022. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

Effect of COVID-19 Pandemic

COVID-19 Travel Restrictions

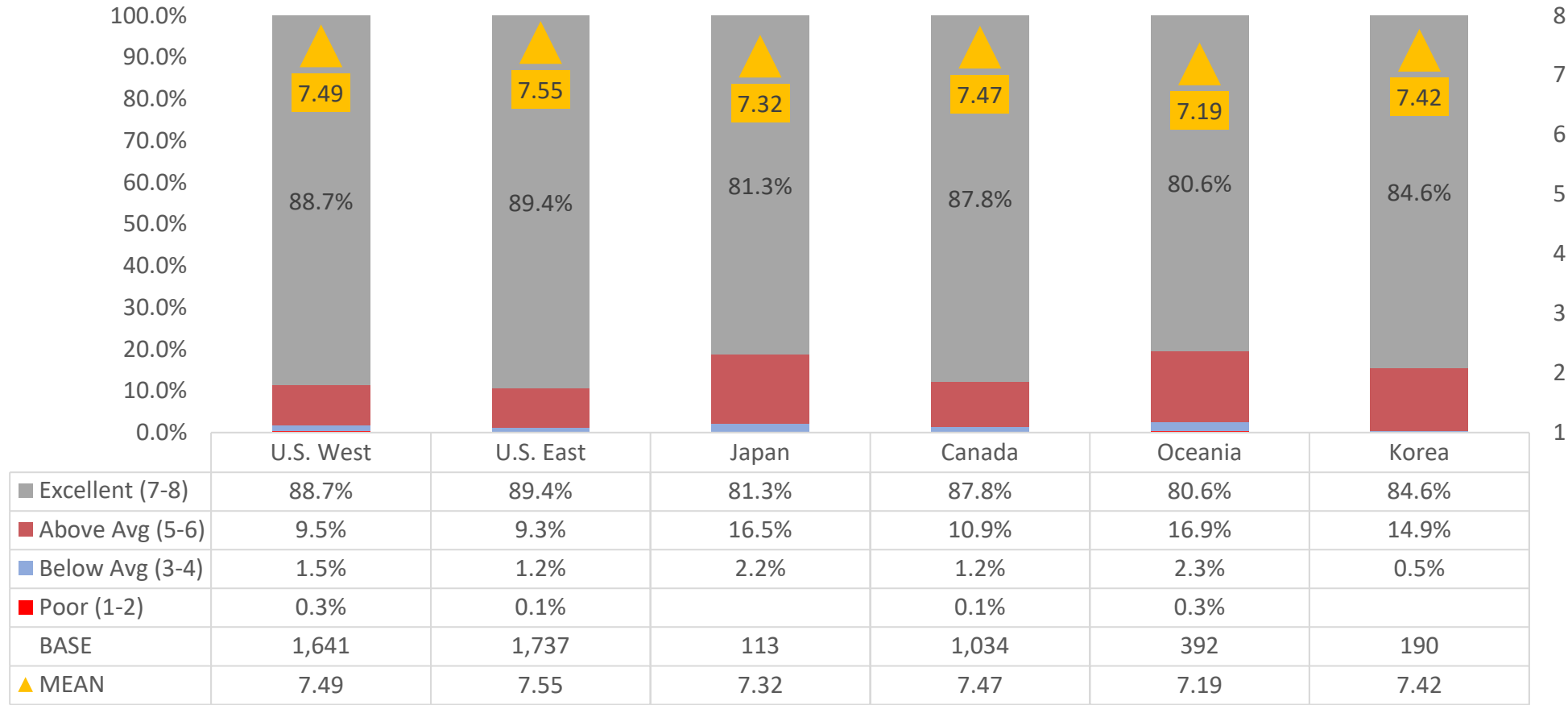
Most international visitor markets have relaxed travel restrictions and quarantine requirements by the third quarter of 2022. However, there continued to be limited direct flights to Hawai'i from Japan, Korea and Oceania. There have been no direct flights from China since service ended in February 2020.

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.

Section 1 – Visitor Satisfaction

Satisfaction - State of Hawai'i by Visitor Market

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



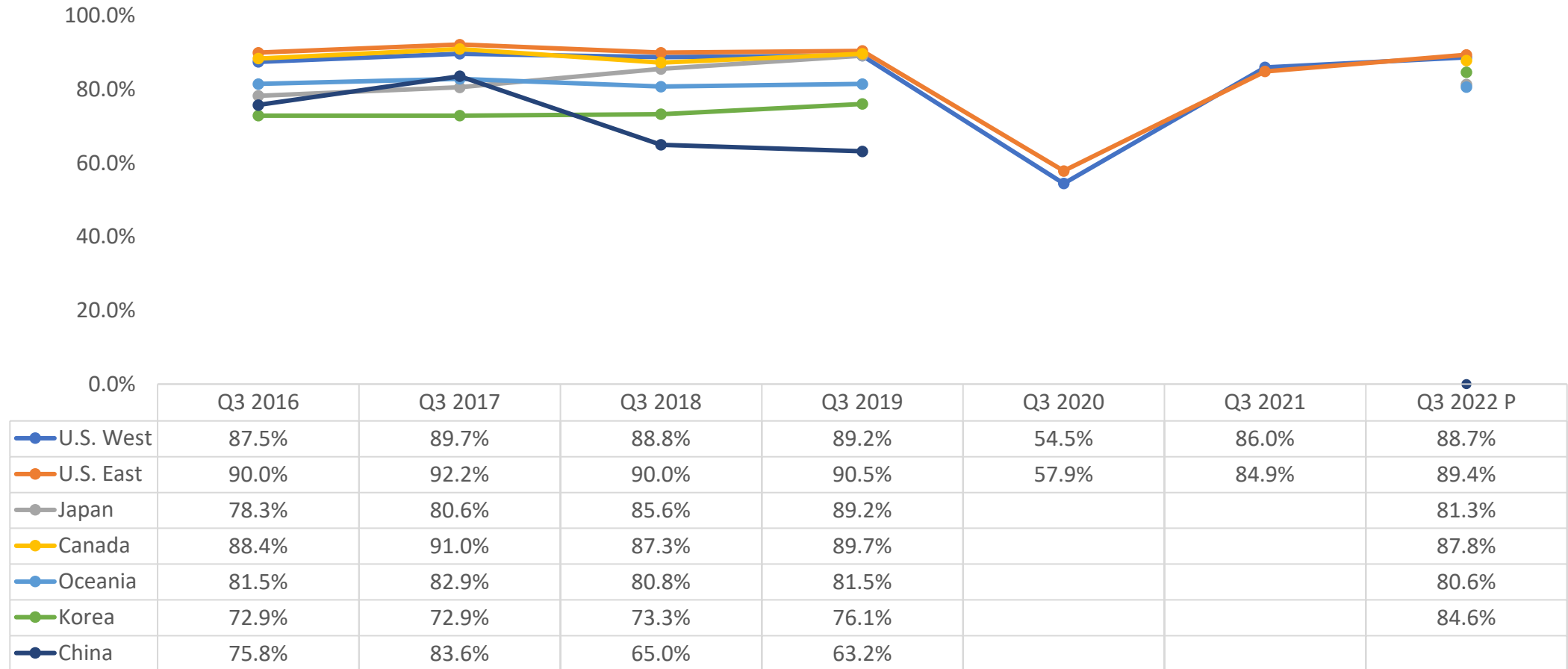
Satisfaction - State of Hawai'i by Visitor Market

- **Age:** Younger visitors from Japan and U.S. West gave higher satisfaction scores compared to older travelers from these visitor markets.
- **Gender:** Female respondents from U.S. East and U.S. West gave higher satisfaction scores than male respondents.
- **Trips to Hawai'i:** Higher satisfaction from first-time visitors from Japan and U.S. East compared to repeat visitors from these markets.
- **Household Income (dollar):** Visitors from U.S. West residing in homes in the bottom income tier (<\$100K) gave higher satisfaction scores than more affluent visitors from this market.

Satisfaction - State of Hawai'i by Visitor Market

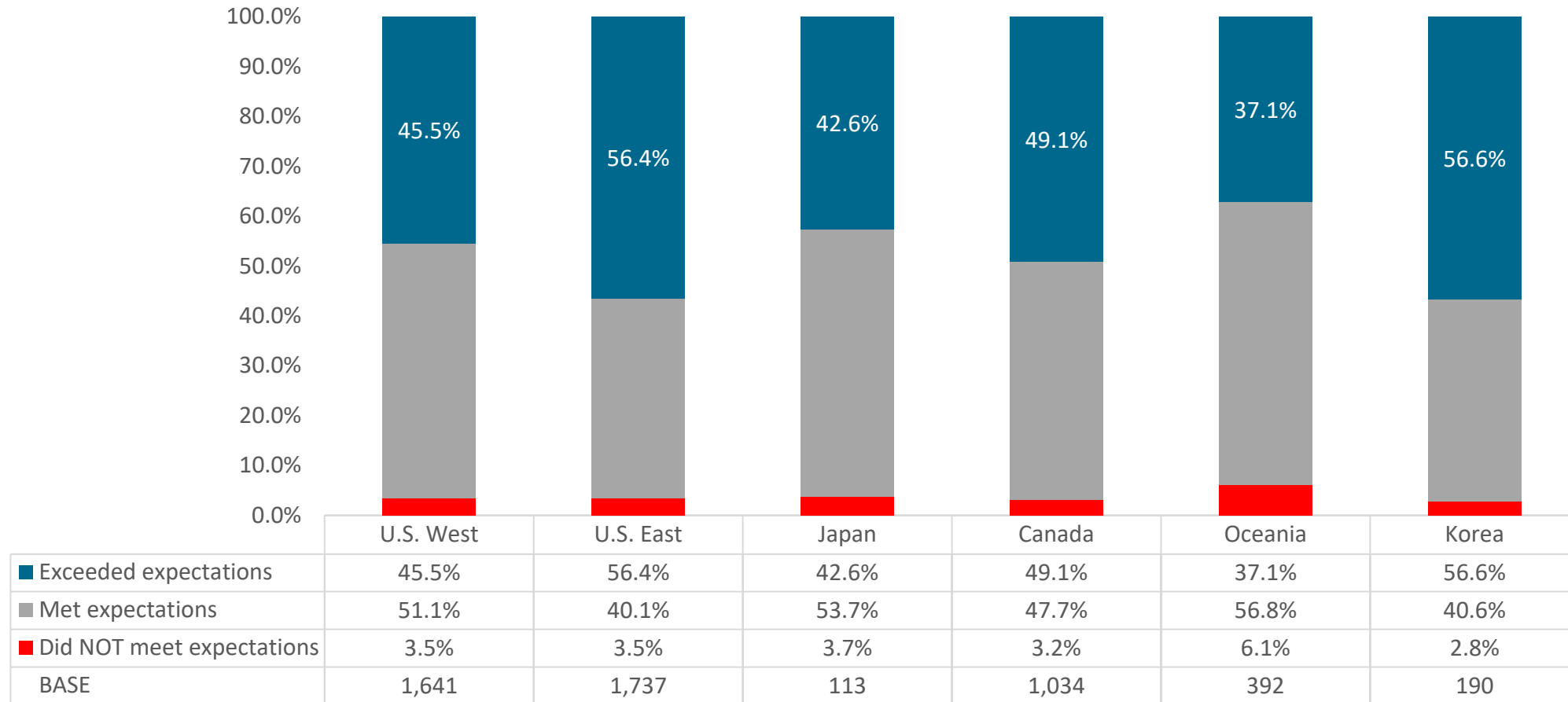
Tracking Data – Rating of “Excellent” (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



P= Preliminary Data

SATISFACTION - HAWAI'I TRIP EXPECTATIONS



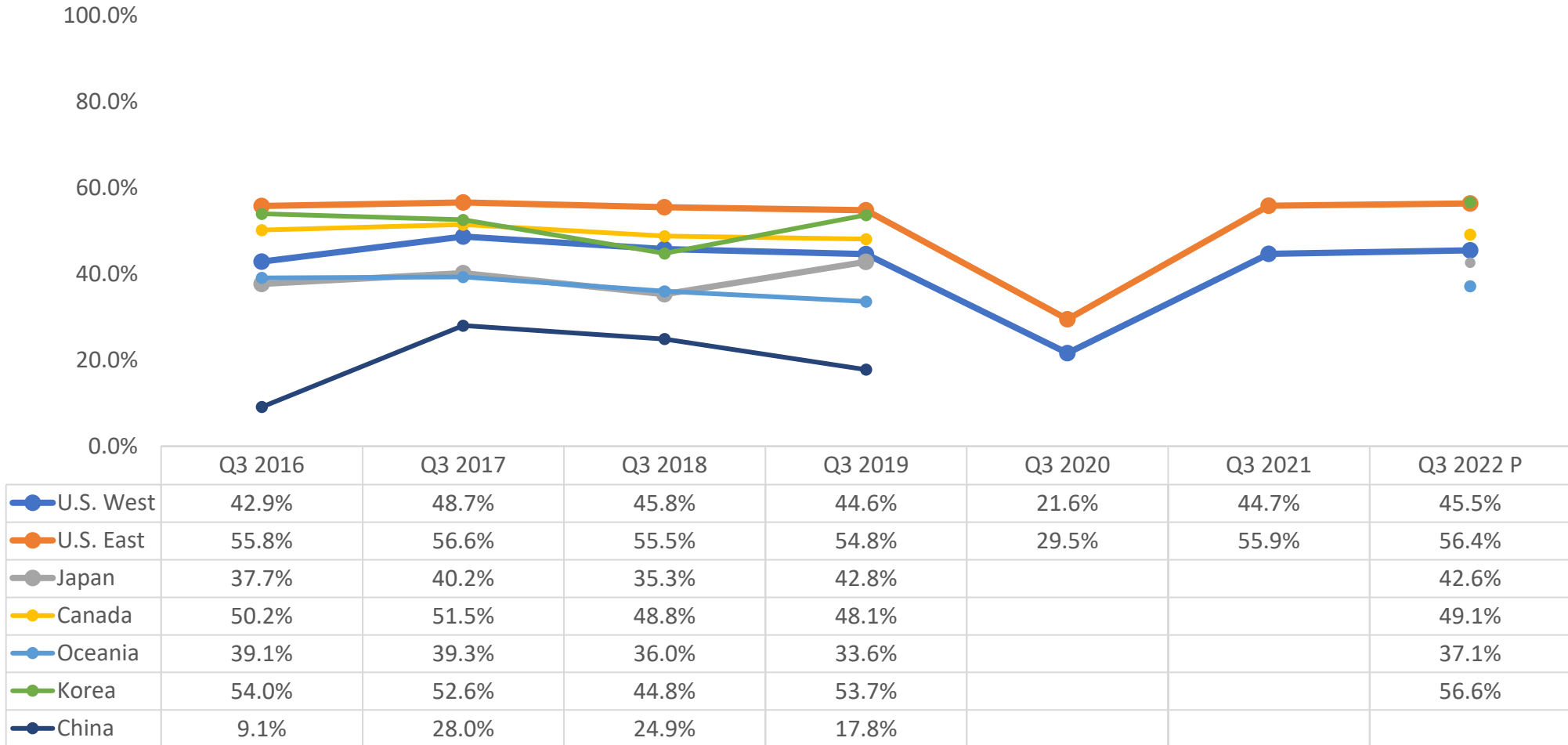
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher mean scores than repeat visitors: U.S. West , U.S. East, Japan, and Canada.
- ***Age:*** Younger segments of the sample were more likely to respond that their trip exceeded expectations from the following visitor markets: U.S. West, U.S. East, and Japan.
- ***Gender:*** Female visitors from U.S. West and U.S. East gave higher satisfaction scores compared to male visitors.
- ***Islands visited:*** Those from U.S. East whose trip consisted of visits to multiple islands gave higher mean scores compared to those who stayed on a single island.
- ***Travel party:*** Visitors from Japan in larger travel parties were more satisfied in this regard compared to those who traveled by themselves.
- ***Education:*** Visitors from Japan without a college degree were also more likely to feel their trip exceeded their expectations.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

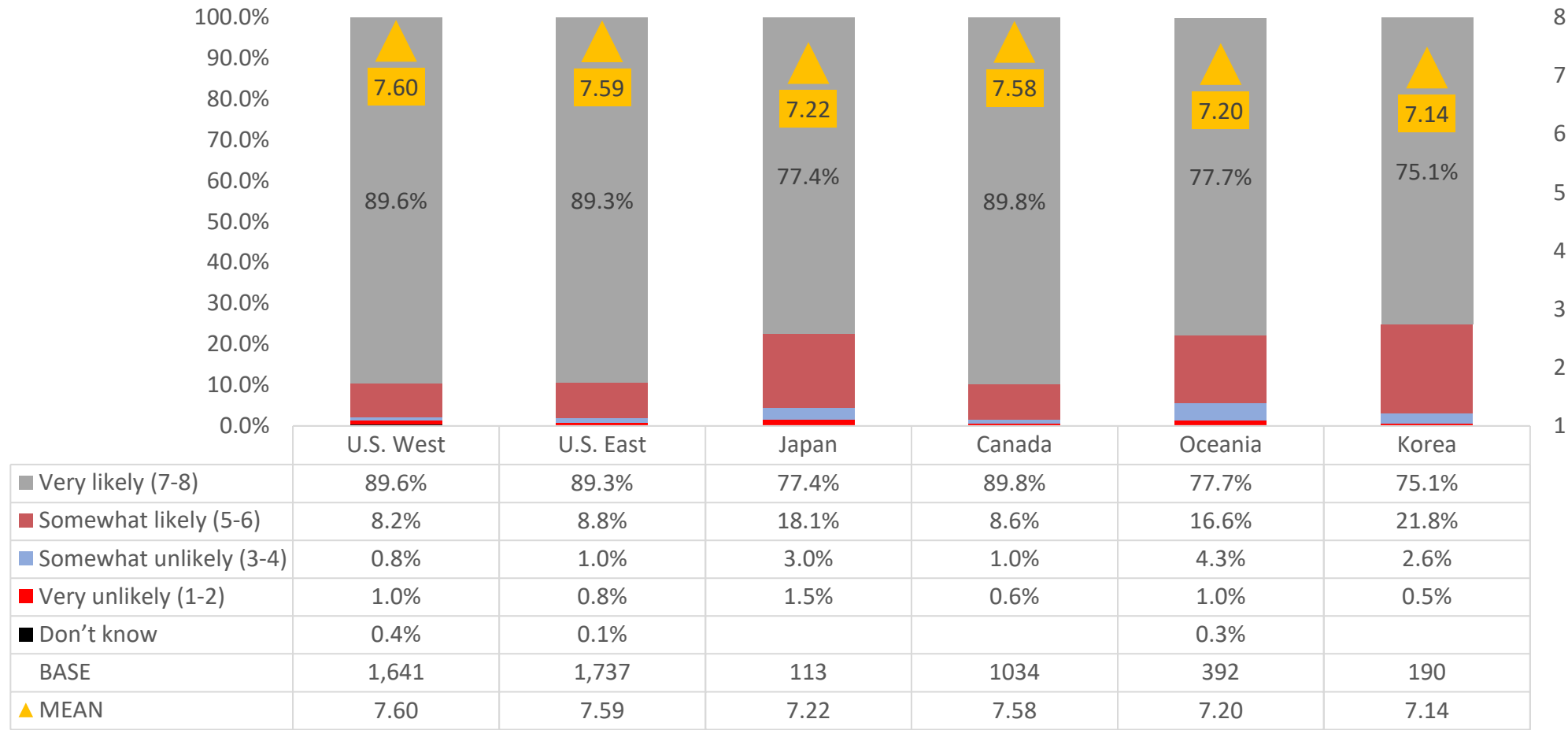
Tracking Data – Rating of “Exceeded expectations”

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



BRAND/ DESTINATION - ADVOCACY

8-pt Rating Scale
8=Very likely / 1=Very unlikely

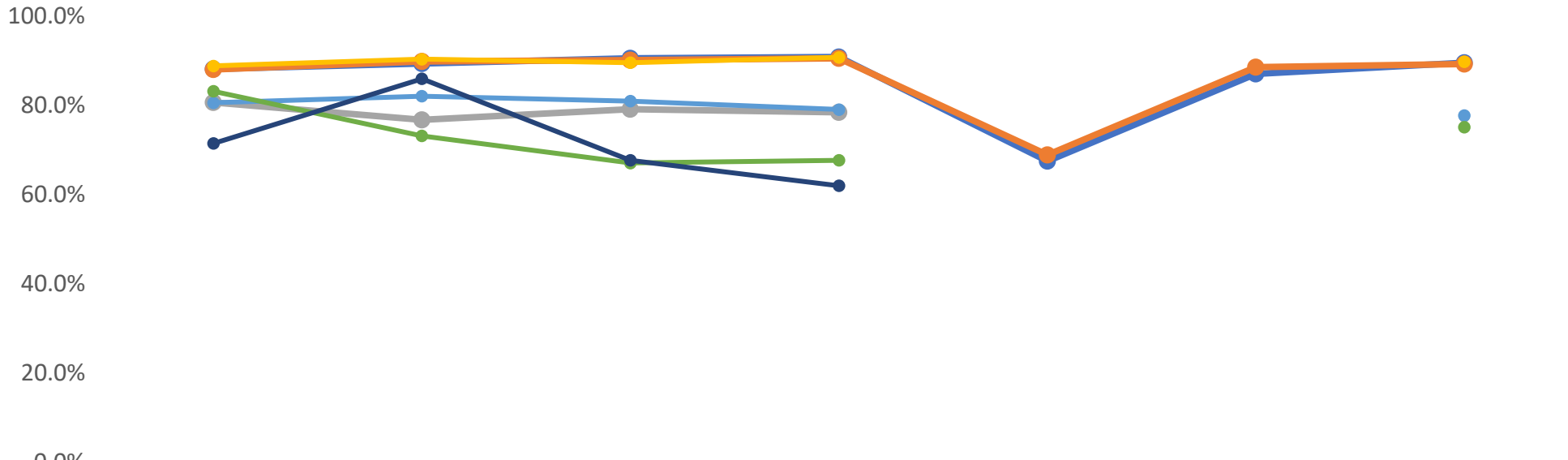


BRAND/ DESTINATION - ADVOCACY

- **Gender:** Females from U.S. West and U.S. East were more likely to recommend the state to others than were males from these visitor markets.
- **Age:** Younger travelers from Japan were stronger advocates for the state than older travelers from this visitor market.
- **Islands visited:** Travelers from U.S. West whose trip included stays on multiple Hawaiian Islands were more likely to recommend the state to others than those whose trip consisted of staying on a single island.

BRAND/ DESTINATION - ADVOCACY

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

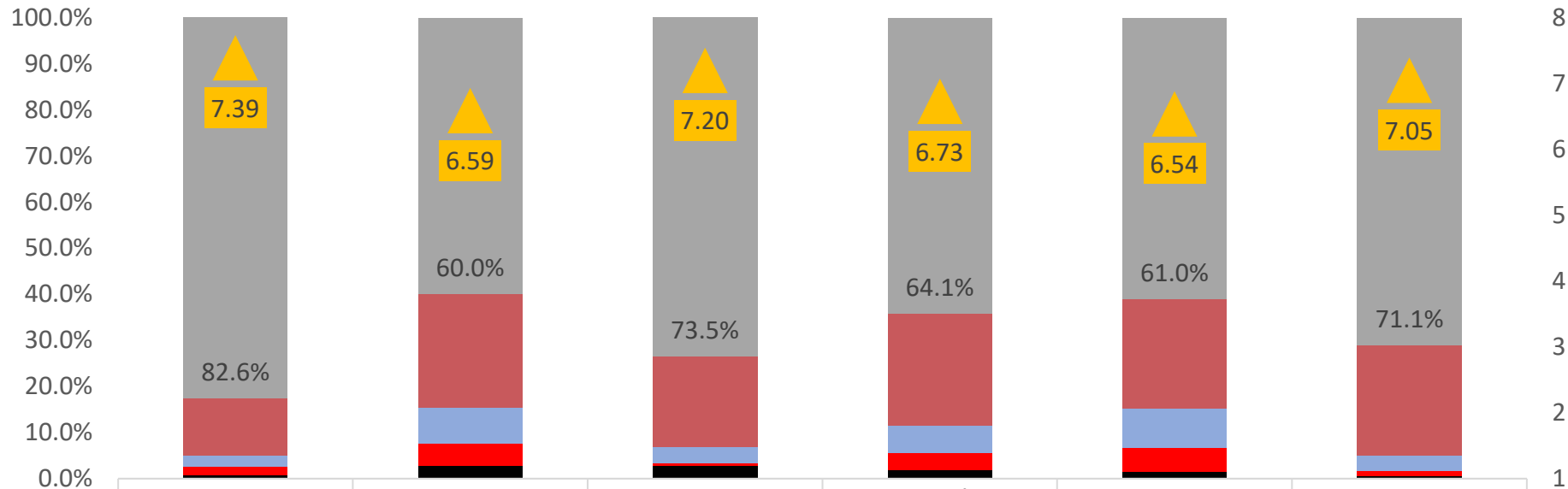


	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022 P
U.S. West	88.2%	89.4%	90.6%	90.9%	67.5%	87.1%	89.6%
U.S. East	88.1%	89.9%	90.2%	90.6%	68.9%	88.6%	89.3%
Japan	80.7%	76.8%	79.2%	78.5%			77.4%
Canada	88.9%	90.4%	89.6%	90.8%			89.8%
Oceania	80.6%	82.1%	81.0%	79.1%			77.7%
Korea	83.2%	73.2%	67.1%	67.7%			75.1%
China	71.5%	86.0%	67.7%	62.0%			

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale
8=Very likely / 1=Very unlikely



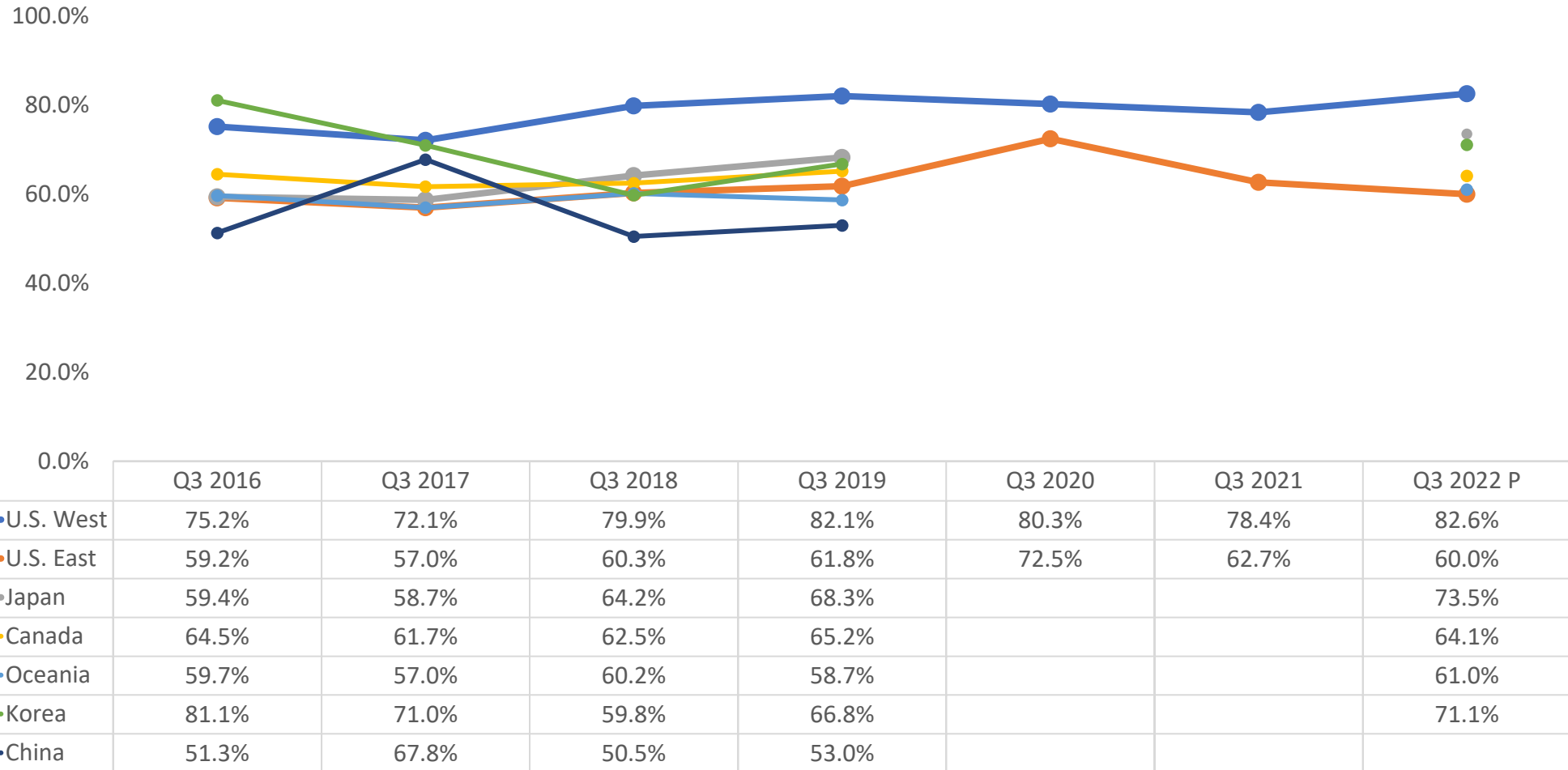
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Very likely (7-8)	82.6%	60.0%	73.5%	64.1%	61.0%	71.1%
Somewhat likely (5-6)	12.4%	24.8%	19.7%	24.4%	23.9%	24.0%
Somewhat unlikely (3-4)	2.4%	7.8%	3.4%	5.9%	8.4%	3.3%
Very unlikely (1-2)	1.8%	4.8%	0.7%	3.8%	5.1%	1.2%
Don't know	0.8%	2.7%	2.7%	1.8%	1.6%	0.5%
BASE	1,641	1,737	113	1034	392	190
MEAN	7.39	6.59	7.20	6.73	6.54	7.05

LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets express a greater likelihood of returning to the state than first-time visitors: U.S. West, U.S. East, Oceania, Japan, and Canada.
- ***Gender:*** Females from U.S. West express a stronger likelihood to return than males from this visitor market.
- ***Travel party size:*** Visitors who traveled to the state by themselves from U.S. West and U.S. East were more likely to return to the state compared to those who traveled in larger travel parties.
- ***Age:*** Older visitors from Japan express a greater likelihood of returning to the state than younger travelers from this visitor market.
- ***Household income (Dollar):*** More affluent visitors from U.S. West express a greater likelihood of returning to the state than less affluent travelers from this visitor market.
- ***Islands visited:*** Visitors from U.S. East and Canada whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than were those who visited multiple islands during their stay.
- ***Education:*** Those without a college degree from U.S. East express a greater likelihood of returning to the state.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q3 2021	Q3 2022 P
34.7% Want to go someplace new	49.3% Too expensive
28.1% Too expensive	29.5% Poor value
27.7% Too crowded/ congested/ traffic	26.7% Want to go someplace new
22.6% Poor value	21.7% Too crowded/ congested/ traffic
13.8% No reason to return/ nothing new	13.6% No reason to return/ nothing new
12.6% Too commercialized/ overdeveloped	12.9% Unfriendly people/ felt unwelcome
12.0% COVID-19	10.9% Flight too long
11.8% Unfriendly people/ felt unwelcome	10.5% Five years is too soon
11.4% Five years is too soon	10.2% Too commercialized/ overdeveloped
10.5% Poor service	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q3 2021	Q3 2022 P
44.1% Too expensive	54.7% Too expensive
36.9% Want to go someplace new	40.9% Want to go someplace new
31.5% Flight too long	37.4% Flight too long
18.4% Poor value	17.4% Poor value
18.2% Too crowded/ congested/ traffic	17.3% Five years is too soon
17.1% Five years is too soon	16.7% Other financial obligations
11.9% Other financial obligations	15.6% Too crowded/ congested/ traffic
10.6% Poor service	10.1% Too commercialized/ overdeveloped
10.5% COVID-19	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q3 2019*	Q3 2022 P**
38.2% Too expensive	89.1% Too expensive
29.5% Want to go someplace new	50.0% No reason to return/ nothing new
29.5% Five years is too soon	39.1% Want to go someplace new
26.7% Other financial obligations	39.1% Five years is too soon
20.8% Flight too long	39.1% Other financial obligations
	10.9% Poor health/ age

*Please note Japanese visitors were not sampled in 2020 & 2021 due to low visitor counts as a result of the pandemic.

**Caution small base

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q3 2019*	Q3 2022 P
50.9% Too expensive	58.9% Too expensive
57.9% Want to go someplace new	45.4% Want to go someplace new
35.7% Flight too long	28.7% Flight too long
29.6% Five years is too soon	18.3% Poor value
17.3% Poor value	16.8% Five years is too soon
15.7% Other financial obligations	13.5% Other financial obligations
12.9% No reason to return/ nothing new	11.0% Too commercialized/ overdeveloped
	10.9% No reason to return/ nothing new

*Please note Canadian visitors were not sampled in 2020 & 2021 due to low visitor counts as a result of the pandemic.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q3 2019*	Q3 2022 P
52.0% Want to go someplace new	71.2% Too expensive
44.7% Too expensive	43.7% Want to go someplace new
29.9% Poor value	35.5% Poor value
26.3% Too commercialized/ overdeveloped	18.9% Too commercialized/ overdeveloped
18.3% No reason to return/ nothing new	17.0% Too crowded/ congested/ traffic
18.0% Too crowded/ congested/ traffic	13.8% Other financial obligations
11.6% Flight too long	12.1% Flight too long
10.2% Five years is too soon	

*Please note Oceania visitors were not sampled in 2020 & 2021 due to low visitor counts as a result of the pandemic.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q3 2019*	Q3 2022 P**
75.2% Too expensive	81.0% Too expensive
29.7% Poor value	43.0% Poor value
24.8% No reason to return/ nothing new	38.0% No reason to return/ nothing new
24.8% Want to go someplace new	23.9% Too commercialized/ overdeveloped
24.8% Other financial obligations	28.5% Flight too long
20.8% Too crowded/ congested/ traffic	19.0% Want to go someplace new
20.8% Flight too long	19.0% Five years is too soon
19.8% Five years is too soon	19.0% Unfriendly people
	19.0% Too crowded/ congested/ traffic

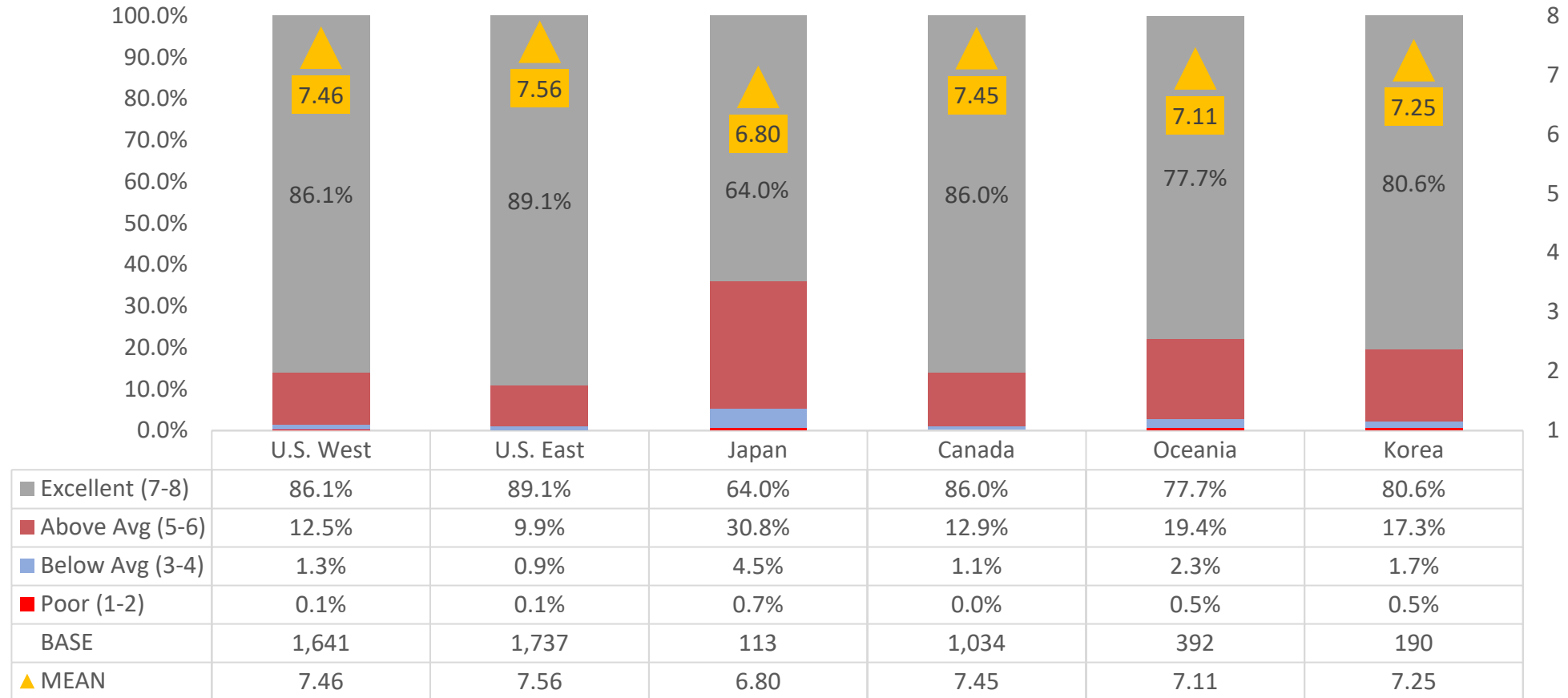
*Please note Oceania visitors were not sampled in 2020 & 2021 due to low visitor counts as a result of the pandemic

**Caution small base.

P= Preliminary Data

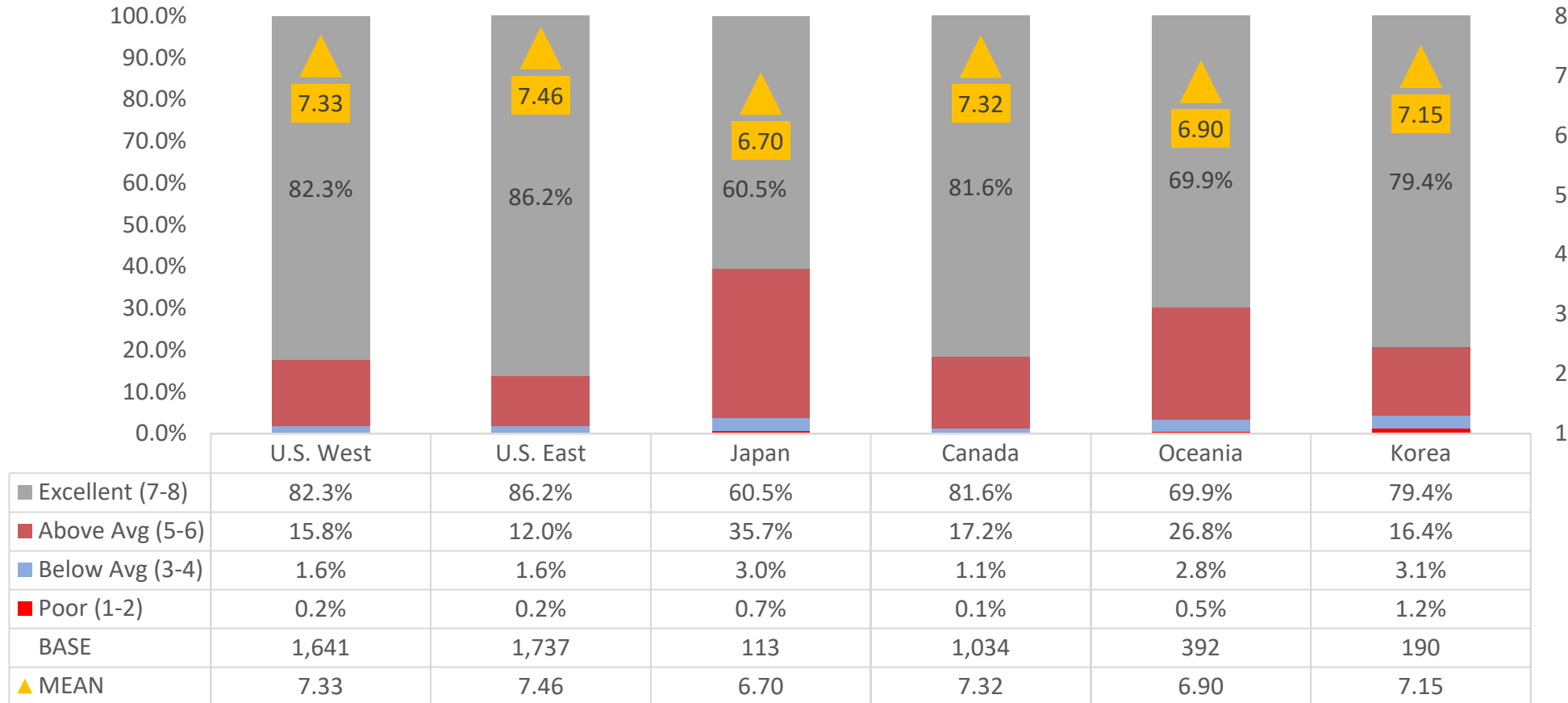
OFFERING A VARIETY OF EXPERIENCES

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



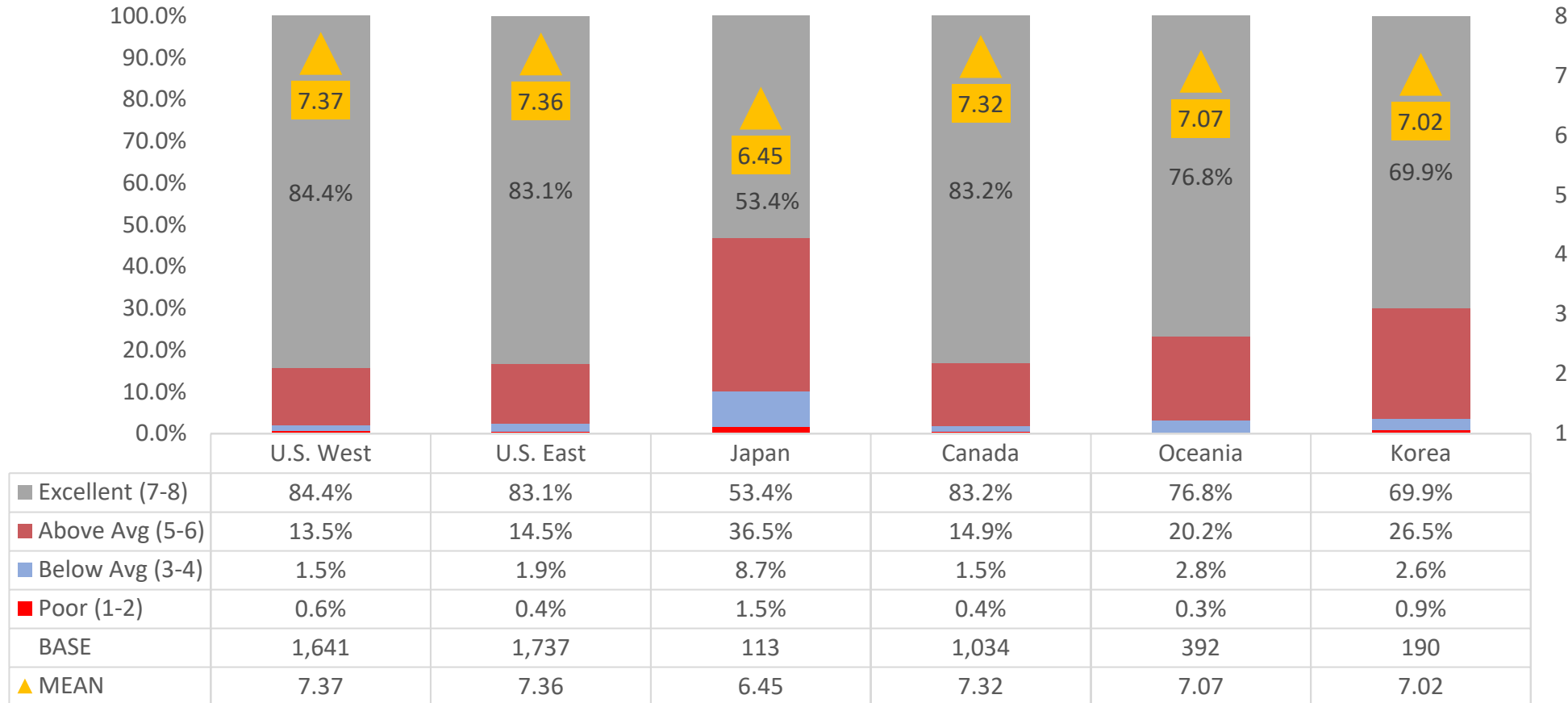
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



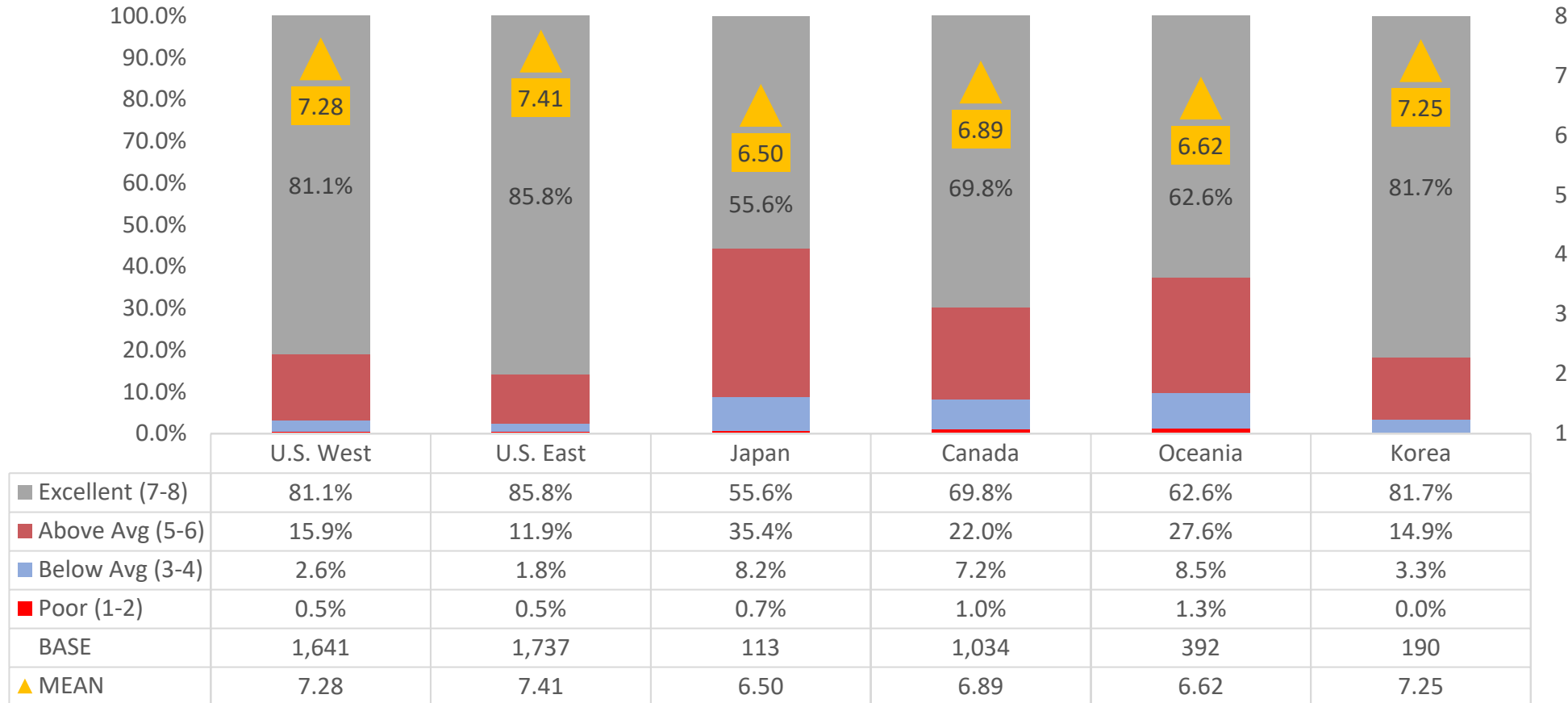
SAFE AND SECURE DESTINATION

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



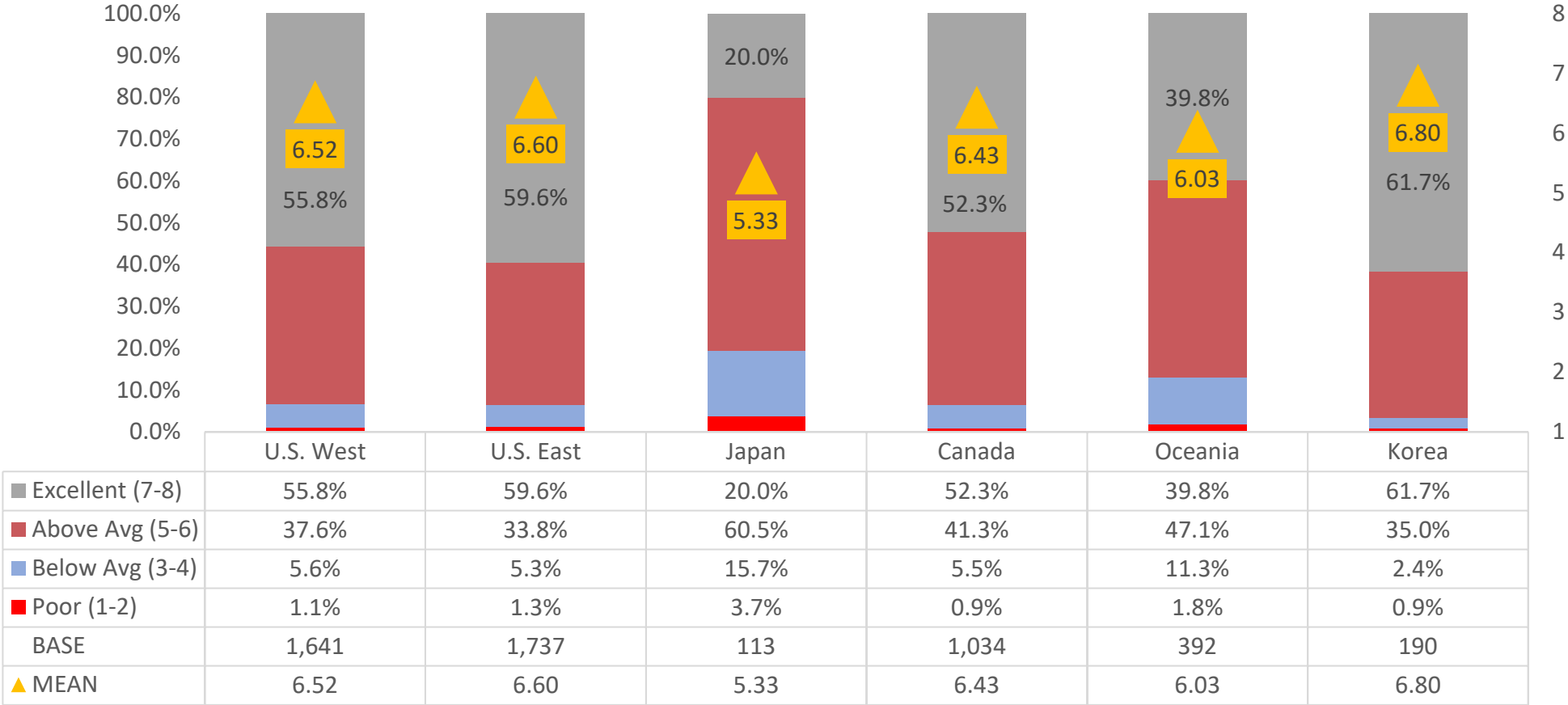
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Section 2 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	98.0%	99.3%	93.9%	99.3%	91.4%	98.6%
On own (self guided)	85.5%	81.3%	79.5%	86.6%	53.2%	73.5%
Helicopter/ airplane	2.9%	7.6%	2.3%	6.1%	3.9%	6.7%
Boat/ submarine/ whale	27.2%	31.8%	3.0%	28.4%	18.0%	29.8%
Visit towns/communities	56.9%	55.0%	43.5%	59.6%	33.3%	36.7%
Limo/ van/ bus tour	8.0%	17.2%	9.9%	11.9%	23.4%	8.0%
Scenic views/ natural landmark	62.5%	69.5%	29.1%	72.1%	49.0%	52.5%
Movie/ TV/ film location	4.1%	6.1%	1.5%	7.4%	8.0%	16.6%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.7%	97.8%	97.7%	99.3%	95.9%	94.8%
Beach/ sunbathing	88.2%	87.0%	80.2%	90.8%	83.3%	72.2%
Bodyboarding	12.1%	9.0%	0.8%	15.2%	5.3%	5.0%
Standup paddle board	6.4%	6.4%	1.5%	6.1%	5.4%	10.0%
Surfing	7.8%	8.4%	5.3%	12.2%	10.5%	17.3%
Canoeing/ kayak	7.4%	7.9%	0.0%	7.8%	3.1%	6.2%
Swim in the ocean	73.6%	71.7%	38.2%	81.7%	69.1%	49.2%
Snorkeling	48.8%	49.0%	15.6%	54.8%	25.9%	45.9%
Freediving	2.3%	1.6%	0.8%	1.3%	1.0%	6.2%
Windsurf/ Kitesurf	0.1%	0.4%	0.0%	0.1%	0.3%	1.2%
Jet ski/ Parasail	1.9%	2.8%	0.0%	1.3%	1.0%	5.4%
Scuba diving	2.3%	3.5%	0.0%	3.8%	1.1%	2.4%
Fishing	2.4%	3.1%	0.0%	2.2%	1.0%	2.9%
Golf	6.8%	6.3%	16.7%	7.6%	3.0%	3.8%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.7%	97.8%	97.7%	99.3%	95.9%	94.8%
Run/ Jog/ Fitness walk	27.0%	26.8%	25.6%	28.3%	23.7%	13.3%
Cycling	3.1%	3.1%	6.9%	5.7%	3.6%	2.4%
Spa	8.6%	10.6%	6.8%	5.9%	5.6%	12.1%
Hiking	46.8%	51.8%	26.8%	54.9%	23.4%	16.1%
Backpack/ camp	1.4%	1.7%	0.0%	1.8%	0.8%	2.9%
Agritourism	12.3%	17.7%	11.8%	13.9%	7.7%	14.4%
Sport event/ tournament	1.1%	1.5%	3.5%	2.9%	1.0%	0.5%
Park/ botanical garden	38.0%	43.0%	24.1%	41.6%	28.8%	18.0%
Waterpark	2.0%	1.6%	3.8%	2.6%	1.8%	6.2%
Mountain tube/ waterfall rappel	2.3%	2.2%	0.8%	1.6%	1.3%	1.9%
Zip lining	5.8%	5.1%	0.0%	3.6%	3.3%	1.4%
Skydiving	0.3%	0.6%	0.0%	0.4%	0.0%	6.6%
All terrain vehicle (ATV)	3.3%	3.7%	0.0%	4.5%	3.8%	8.0%
Horseback riding	1.1%	1.7%	2.3%	0.6%	0.8%	6.7%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	99.1%	99.0%	97.7%	99.4%	99.0%	96.7%
Lunch/ sunset/ dinner/ evening cruise	23.3%	28.4%	18.4%	22.9%	21.3%	47.8%
Live music/ stage show	30.7%	39.4%	14.9%	30.8%	20.0%	16.6%
Nightclub/ dancing/ bar/ karaoke	7.4%	7.0%	0.8%	5.1%	8.5%	2.4%
Fine dining	47.9%	51.6%	27.5%	41.9%	32.6%	50.7%
Family restaurant	65.0%	59.6%	28.3%	67.2%	66.2%	37.0%
Fast food	38.4%	36.5%	39.3%	54.5%	54.2%	43.8%
Food truck	43.7%	45.5%	23.7%	49.5%	31.8%	49.9%
Café/ coffee house	51.6%	47.5%	57.0%	59.3%	61.6%	47.1%
Ethnic dining	27.1%	32.8%	11.4%	25.7%	13.2%	26.3%
Farm to table cuisine	17.0%	19.5%	10.3%	13.1%	4.8%	5.7%
Prepared own meal	47.6%	40.4%	56.1%	57.6%	22.8%	9.3%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.8%	96.8%	98.5%	97.9%	98.7%	94.8%
Mall/ department store	46.4%	41.3%	71.0%	60.4%	71.2%	72.4%
Designer boutique	17.5%	20.9%	16.1%	22.5%	17.6%	5.7%
Hotel/ resort store	35.3%	42.6%	29.4%	30.8%	27.6%	32.9%
Swap meet/ flea market	19.4%	16.2%	3.0%	14.0%	6.9%	5.9%
Discount/ outlet store	16.1%	16.2%	22.5%	20.2%	35.9%	50.9%
Supermarket	63.8%	55.2%	61.5%	67.4%	48.2%	35.8%
Farmer's market	34.9%	33.8%	26.4%	42.7%	19.5%	10.7%
Convenience store	53.8%	50.1%	41.6%	58.1%	63.1%	38.6%
Duty free store	4.5%	4.6%	12.7%	5.6%	7.2%	35.5%
Hawai'i made products	47.9%	50.0%	18.7%	51.2%	32.0%	20.6%
Local shop/ artisan	60.8%	62.0%	24.9%	61.5%	41.2%	18.7%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	69.7%	81.7%	48.1%	74.2%	66.6%	65.7%
Historic military site	19.6%	29.8%	11.2%	20.5%	31.1%	26.8%
Historic Hawaiian site	30.0%	37.9%	18.3%	34.3%	25.4%	10.9%
Other historical site	13.3%	16.6%	6.1%	14.5%	8.4%	16.8%
Art museums	3.4%	4.4%	4.2%	4.5%	4.6%	4.8%
Art gallery/ exhibition	10.4%	11.2%	7.3%	10.1%	5.6%	0.5%
Luau/ Polynesian show/ hula show	29.8%	47.7%	14.5%	33.8%	22.2%	20.9%
Lesson ex. ukulele, hula, canoe, lei making	4.3%	6.9%	3.5%	6.1%	3.3%	4.0%
Play/ concert/ theatre	2.3%	2.5%	0.8%	1.9%	3.4%	8.6%
Art/ craft fair	11.2%	10.4%	2.3%	9.4%	5.6%	5.2%
Festival /event	4.9%	4.3%	5.0%	4.9%	4.3%	1.2%

ACTIVITIES - TRANSPORTATION

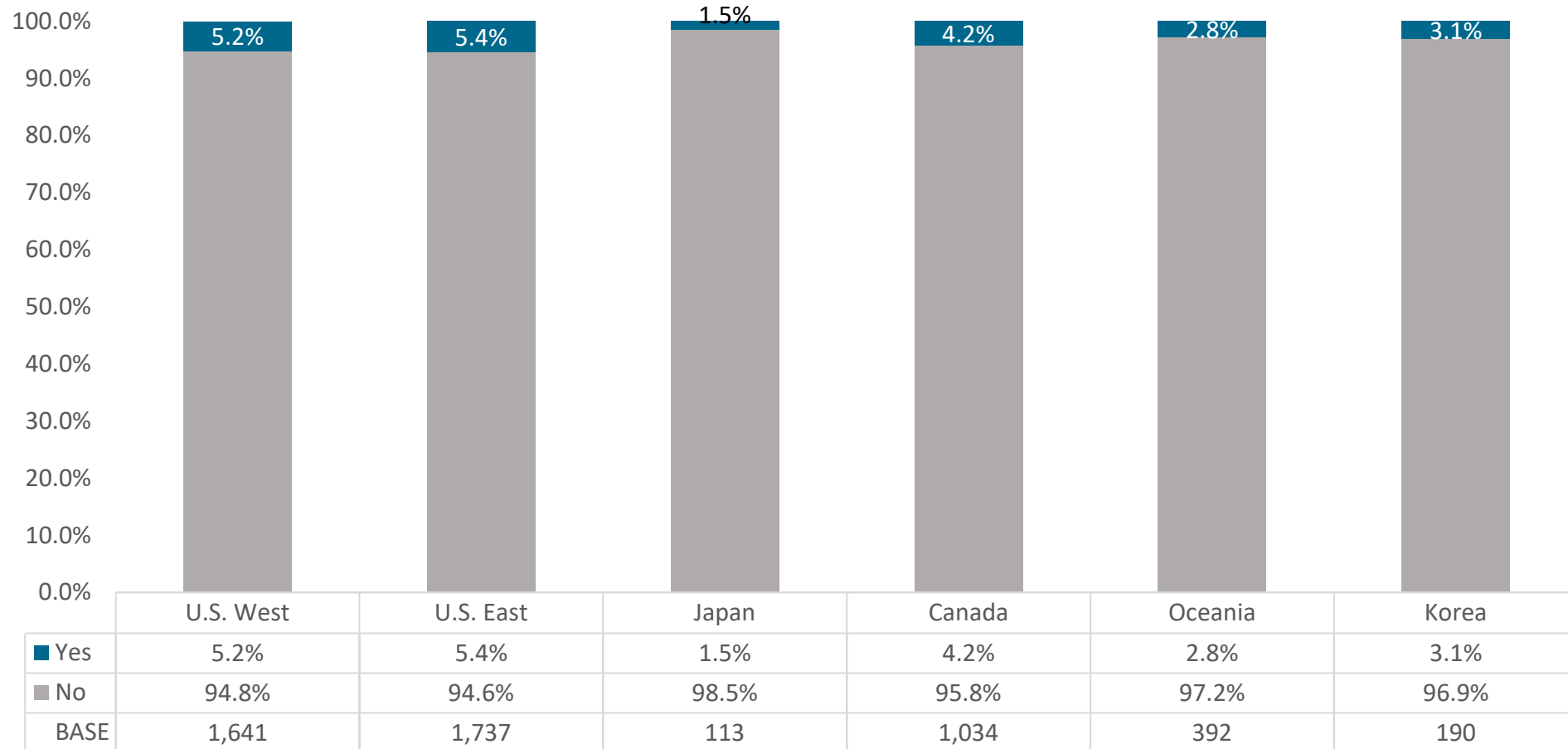
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	94.0%	93.4%	97.0%	96.4%	97.7%	90.2%
Airport shuttle	14.7%	17.0%	12.6%	14.9%	30.8%	14.9%
Trolley	4.3%	3.9%	16.4%	5.0%	12.0%	18.0%
Public bus	5.0%	4.5%	21.8%	9.4%	25.8%	12.8%
Tour bus/ tour van	7.4%	17.2%	9.6%	11.8%	21.9%	23.2%
Taxi/ limo	7.8%	10.3%	28.7%	13.6%	36.9%	15.2%
Rental car	74.9%	70.5%	53.4%	74.6%	33.4%	53.6%
Ride share	18.0%	20.9%	28.0%	22.8%	36.9%	21.5%
Car share	7.2%	6.4%	2.3%	6.6%	3.1%	2.6%
Bicycle rental	2.7%	2.3%	5.0%	3.7%	3.1%	4.3%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	31.3%	28.8%	24.8%	20.2%	14.8%	27.6%
Visit friends/ family	29.6%	25.9%	24.0%	17.4%	13.0%	25.4%
Volunteer non profit	2.5%	3.9%	1.5%	3.4%	2.1%	2.1%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

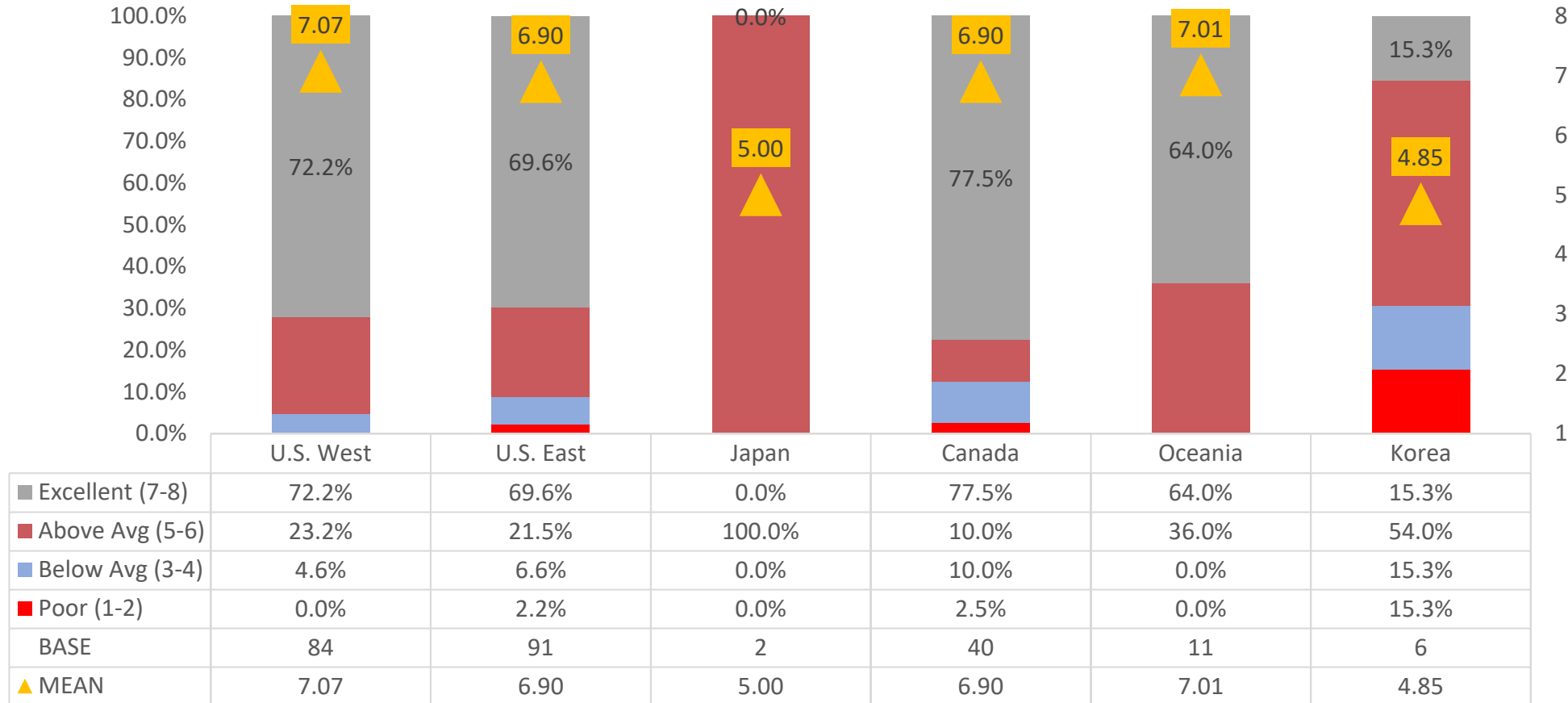


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Mobility aid	78.0%	71.5%	50.0%	72.1%	81.8%	0.0%
Personal assistance	23.1%	19.4%	0.0%	30.0%	18.2%	30.7%
Other	4.5%	5.6%	0.0%	2.3%	0.0%	0.0%
NA No one needed assistance	1.1%	6.4%	0.0%	9.4%	0.0%	46.0%
Lift equipped van	3.4%	2.1%	0.0%	4.7%	0.0%	0.0%
Ambulance/ Hospital/ Medical visit	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Orientation and Mobility Assistance	0.0%	1.1%	50.0%	2.4%	9.3%	0.0%
Print material in alternate format	0.0%	2.3%	0.0%	4.7%	0.0%	0.0%
Service/ assistance animal	0.0%	1.1%	0.0%	0.0%	0.0%	23.3%
Respiratory equipment	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%
BASE	85	92	2	43	11	6

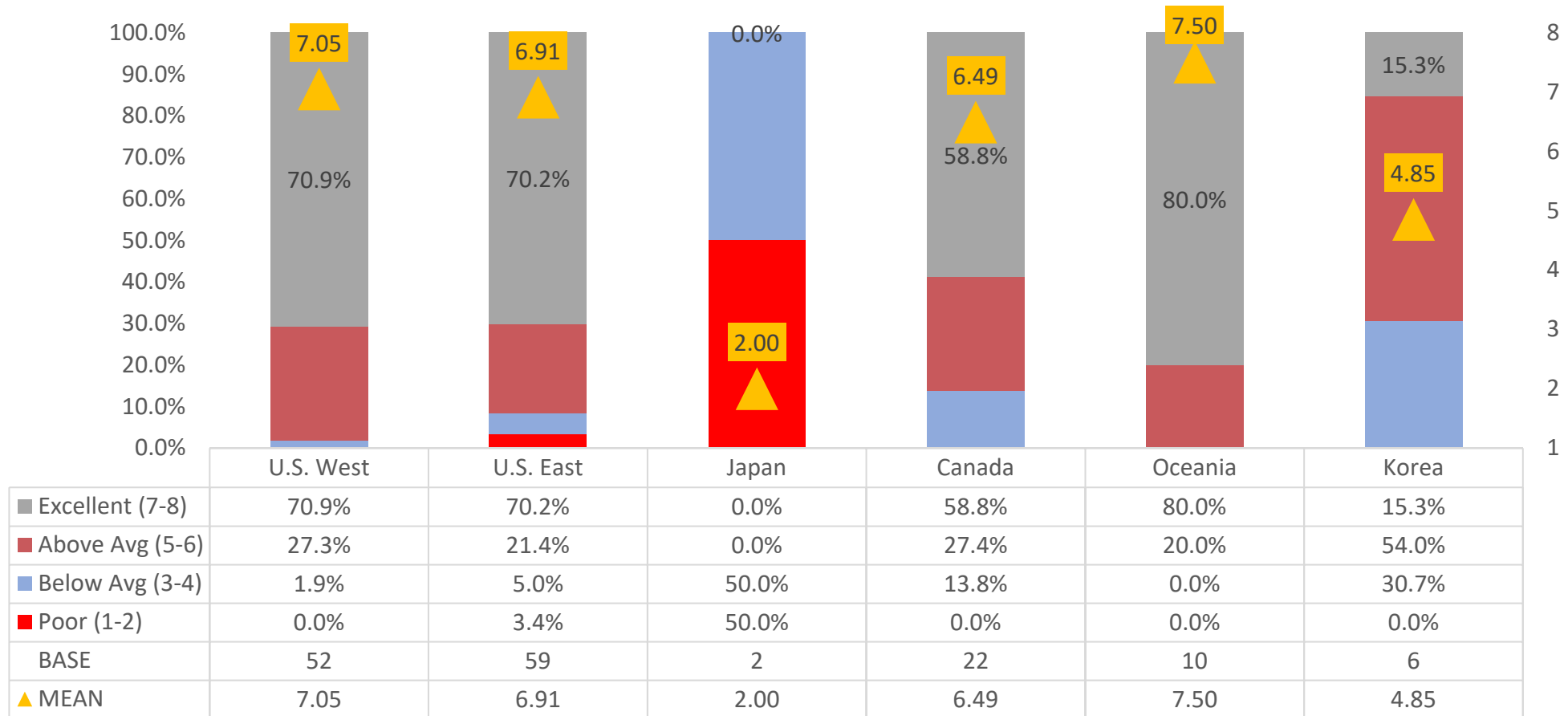
OVERALL ACCESSIBILITY - AIRPORTS

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



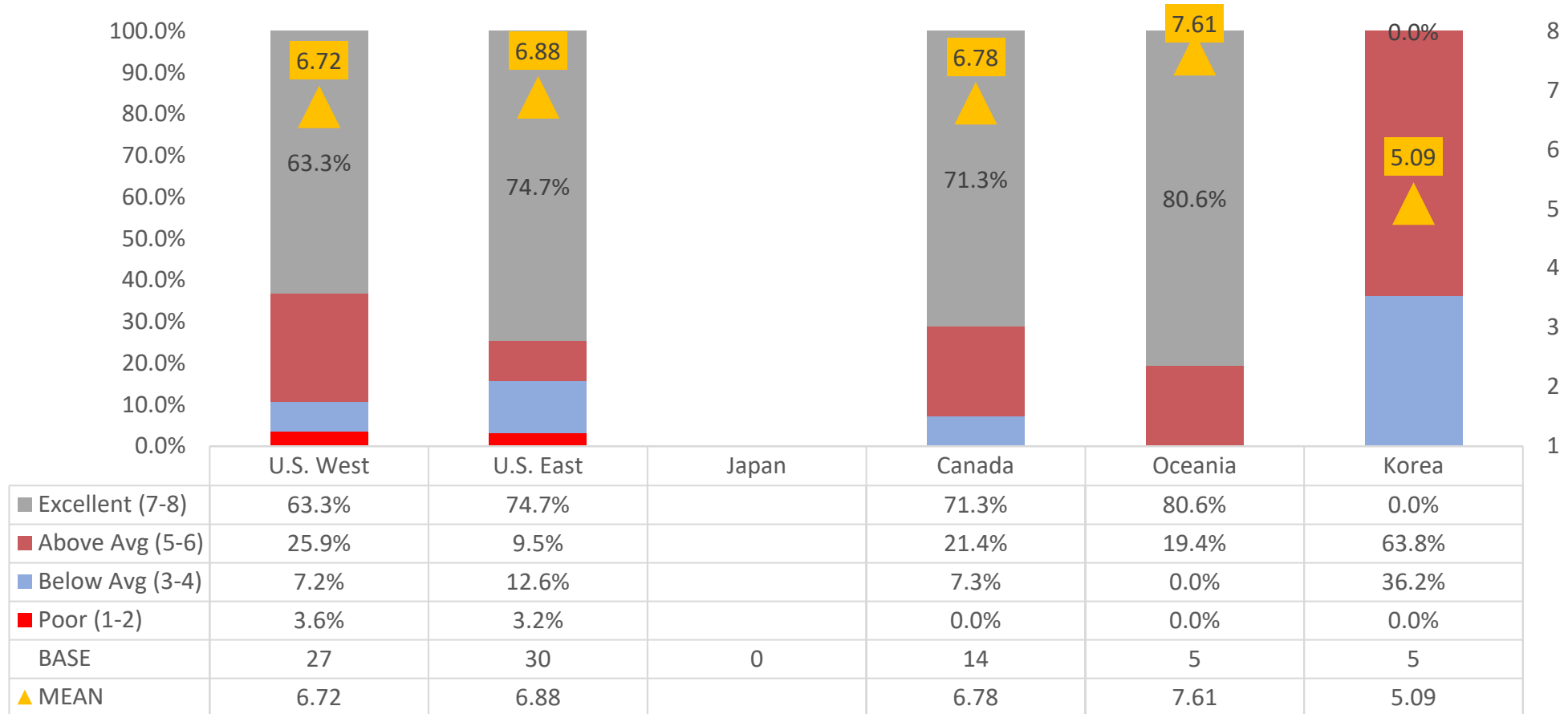
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



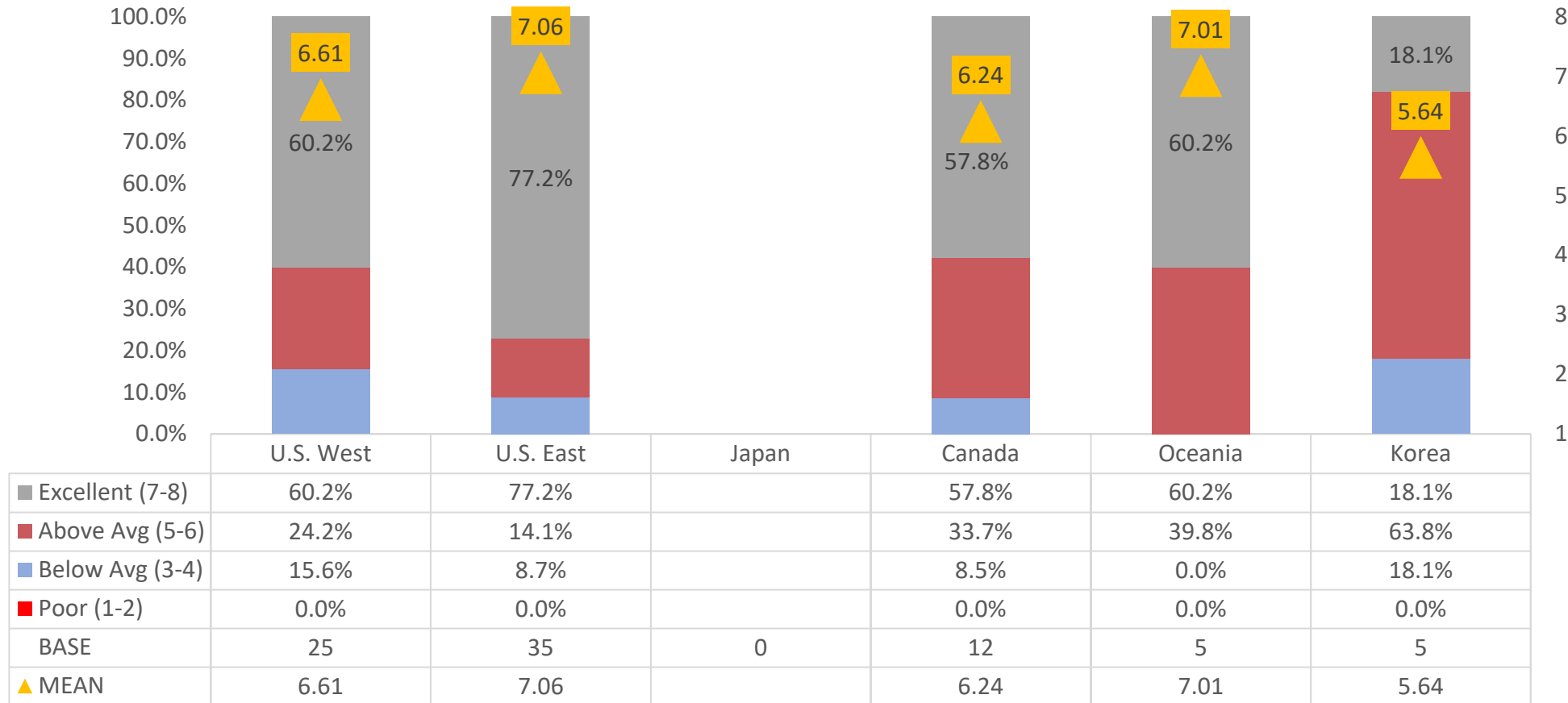
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



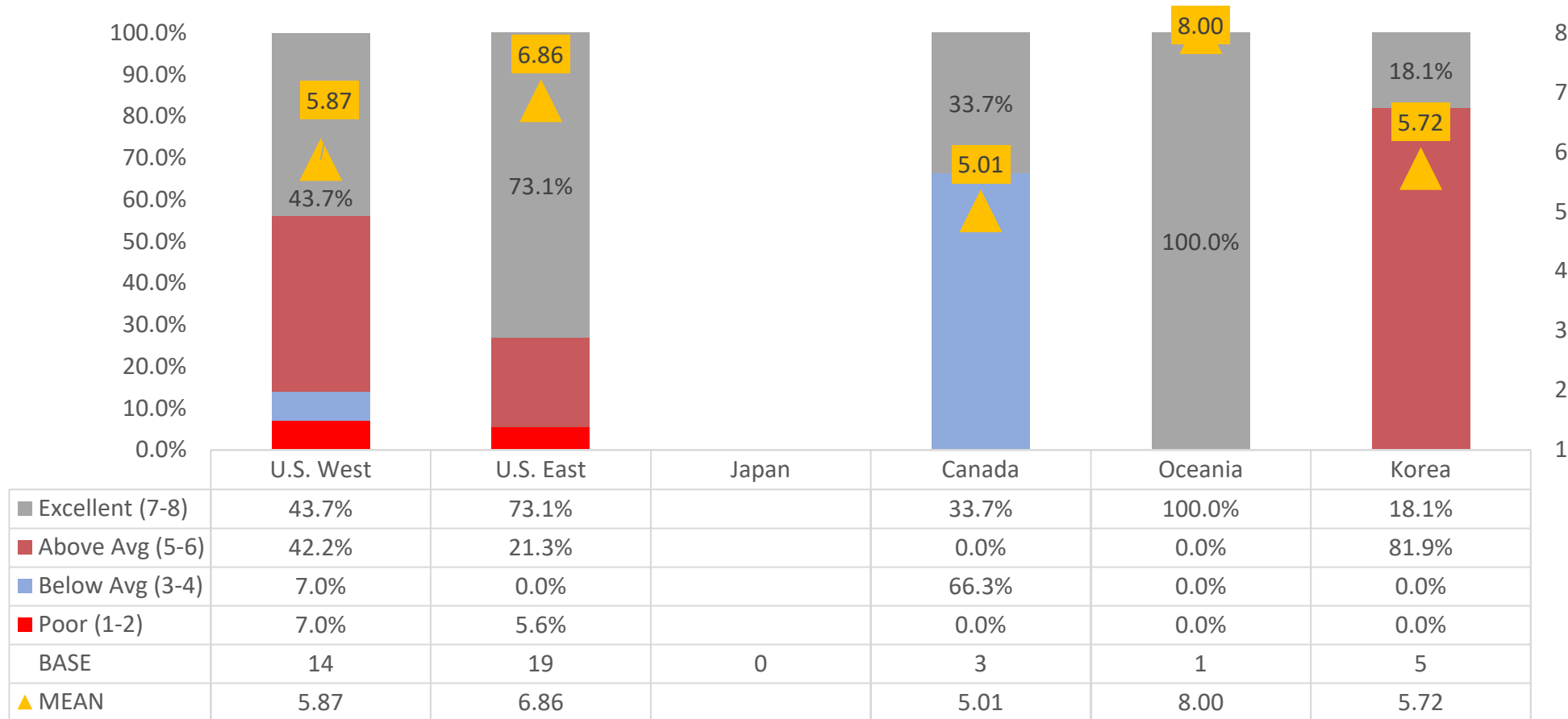
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



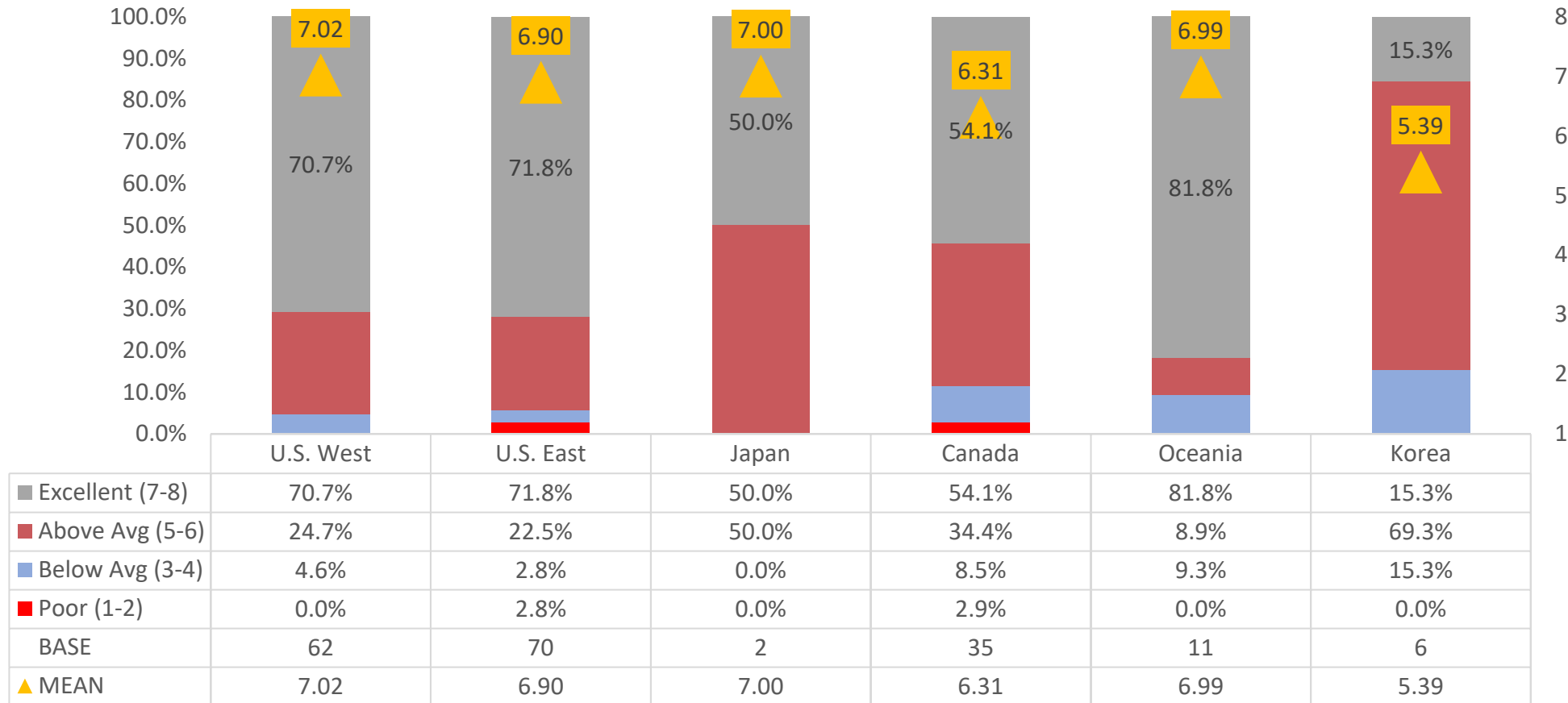
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



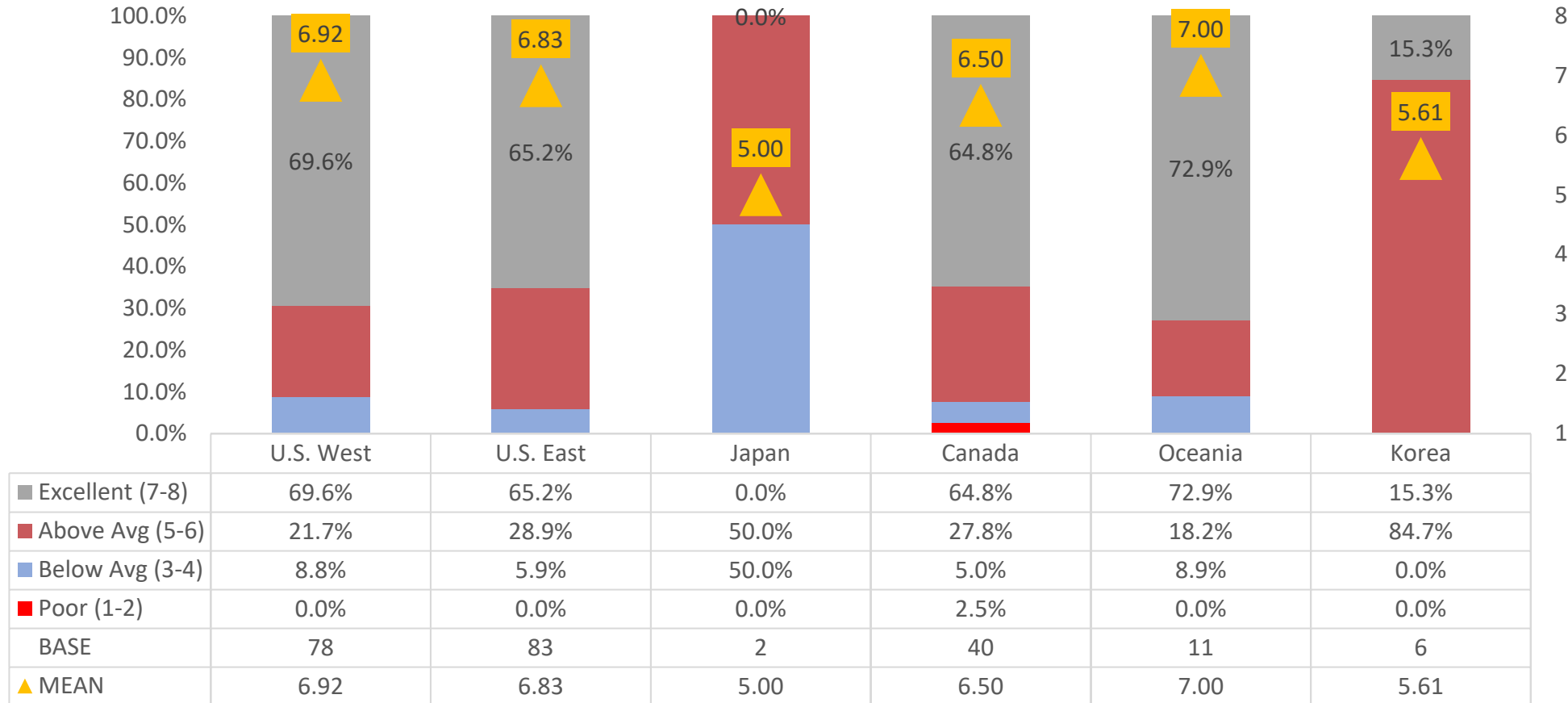
OVERALL ACCESSIBILITY - HOTELS

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



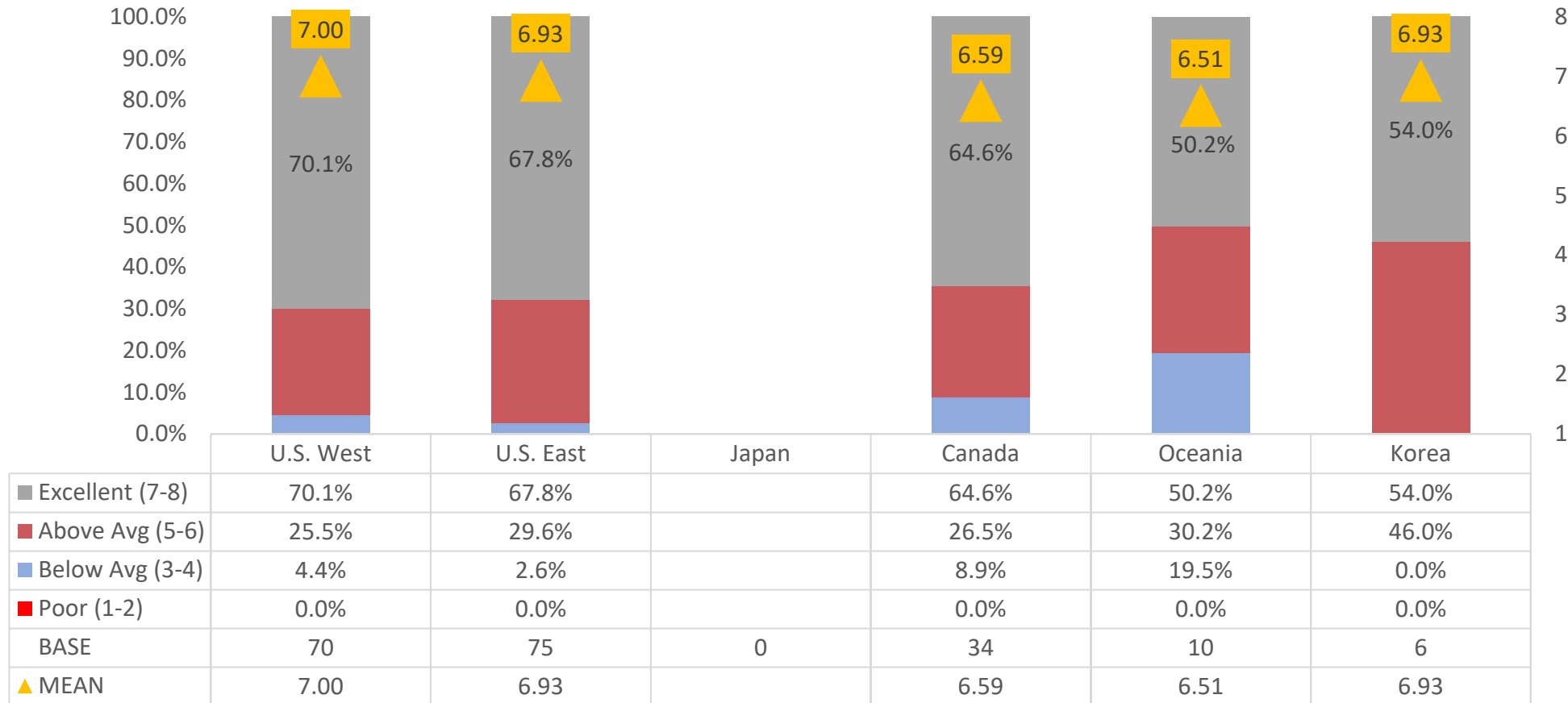
OVERALL ACCESSIBILITY - RESTAURANTS

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



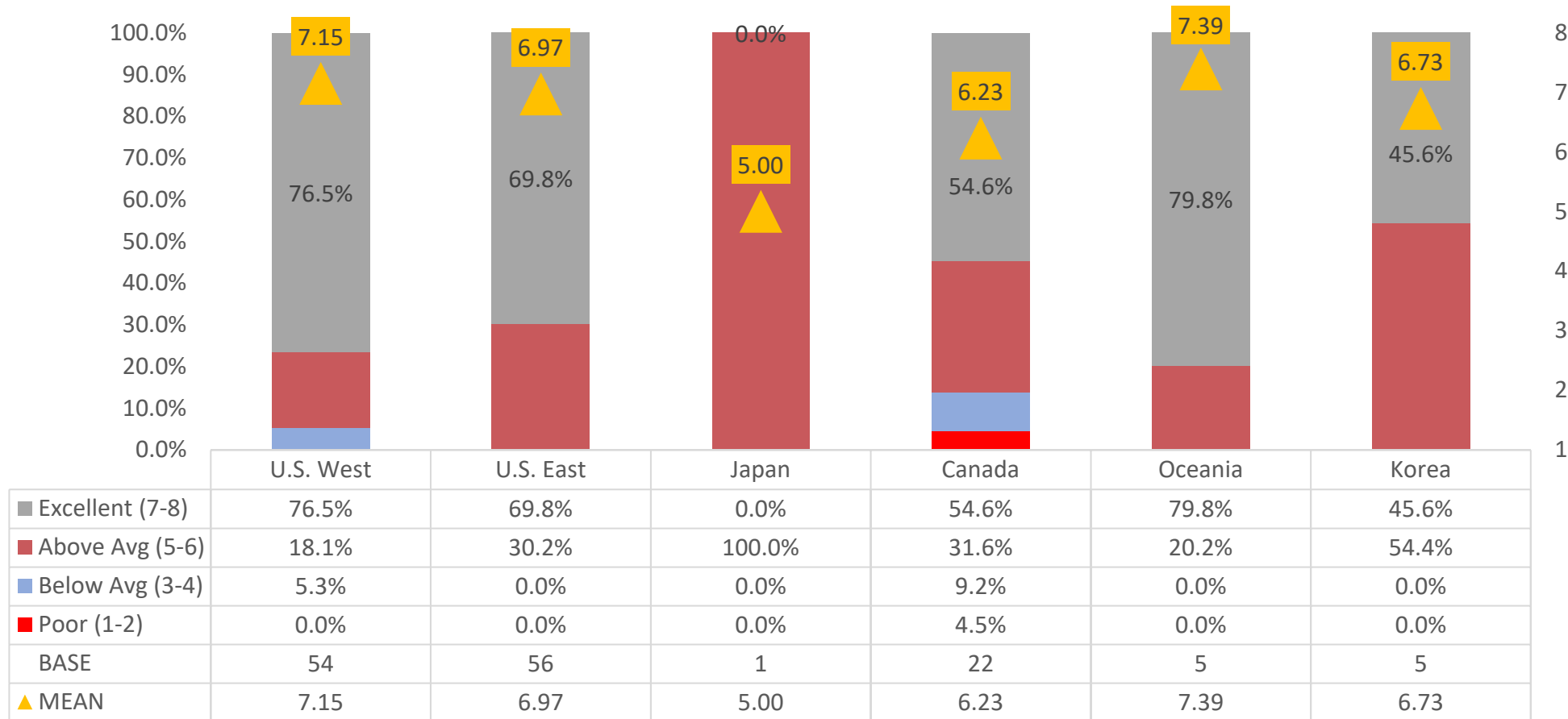
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



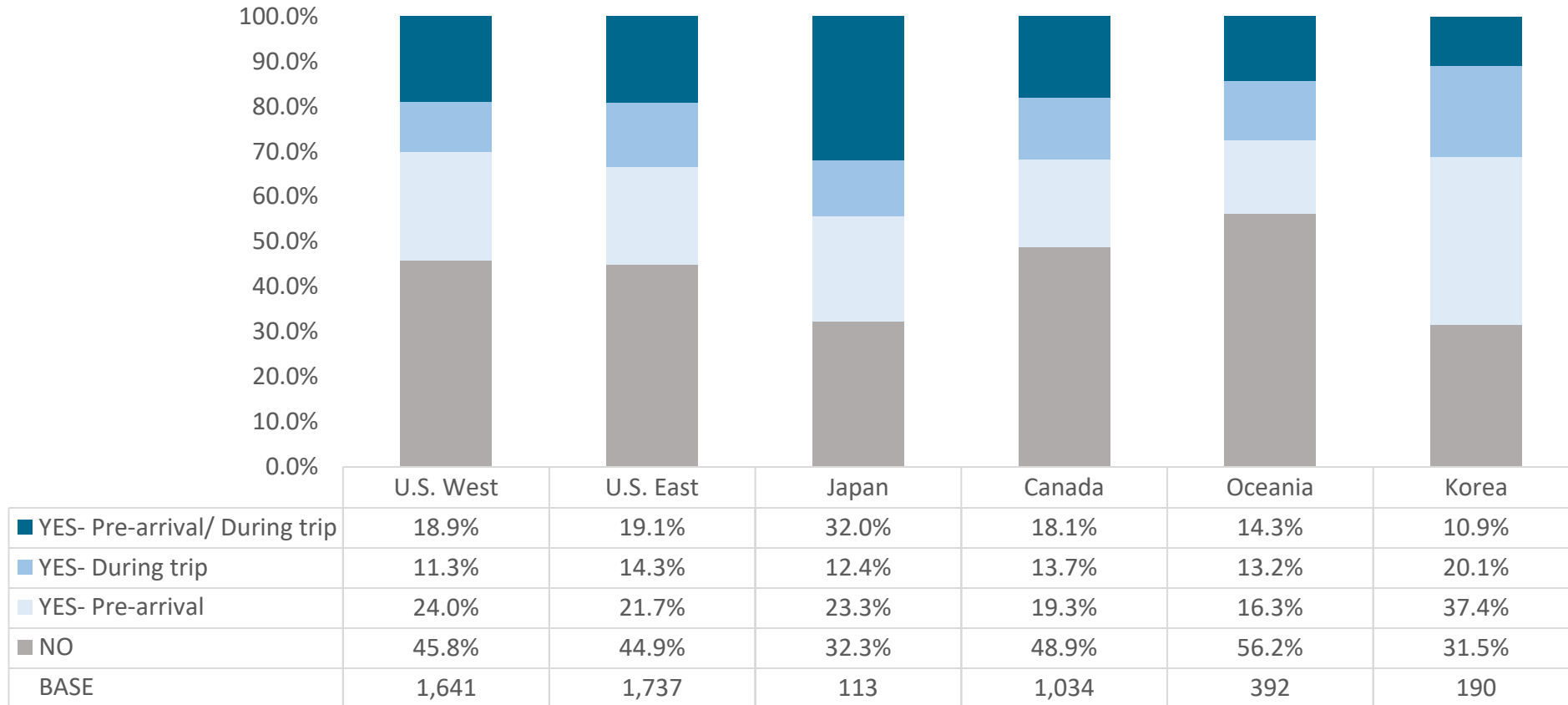
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

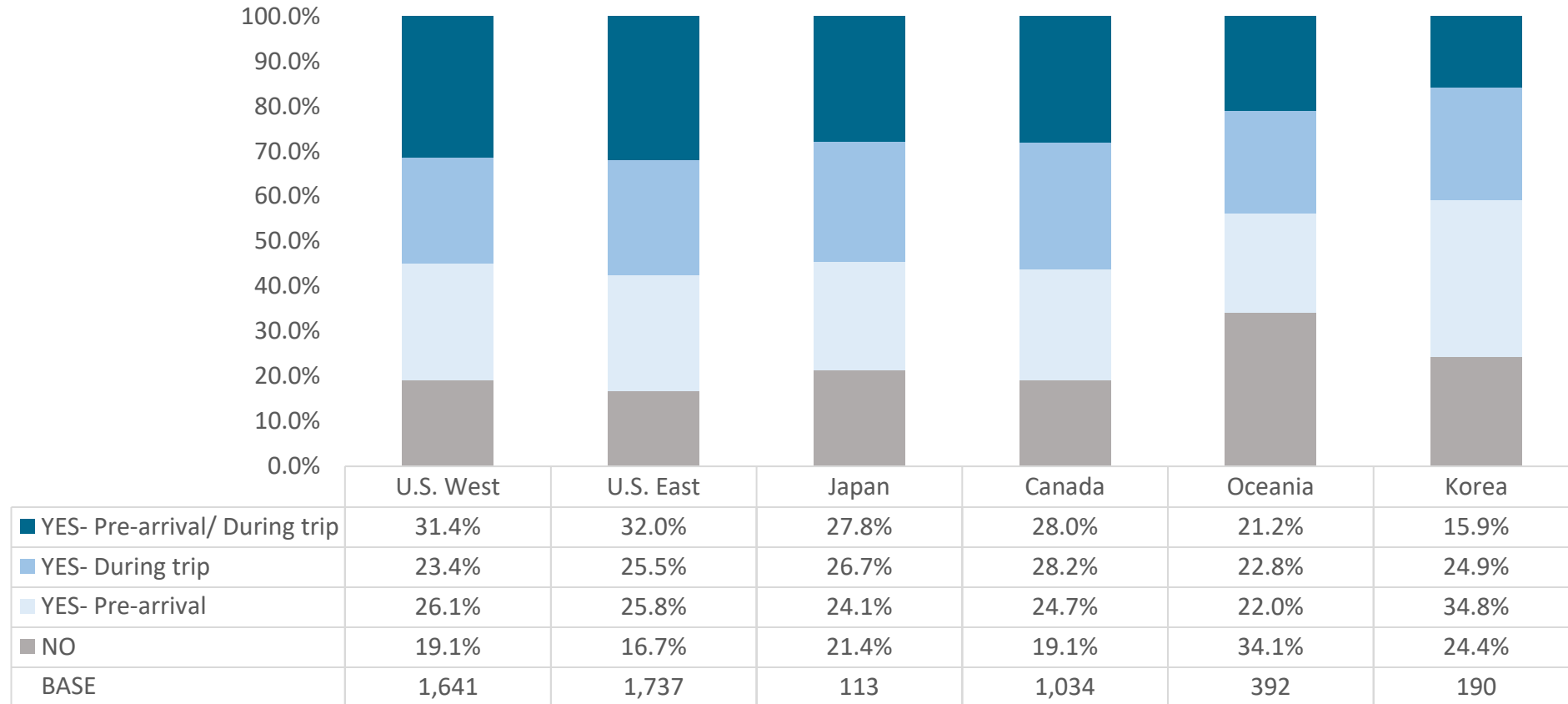


Section 4 – Alternative Messaging

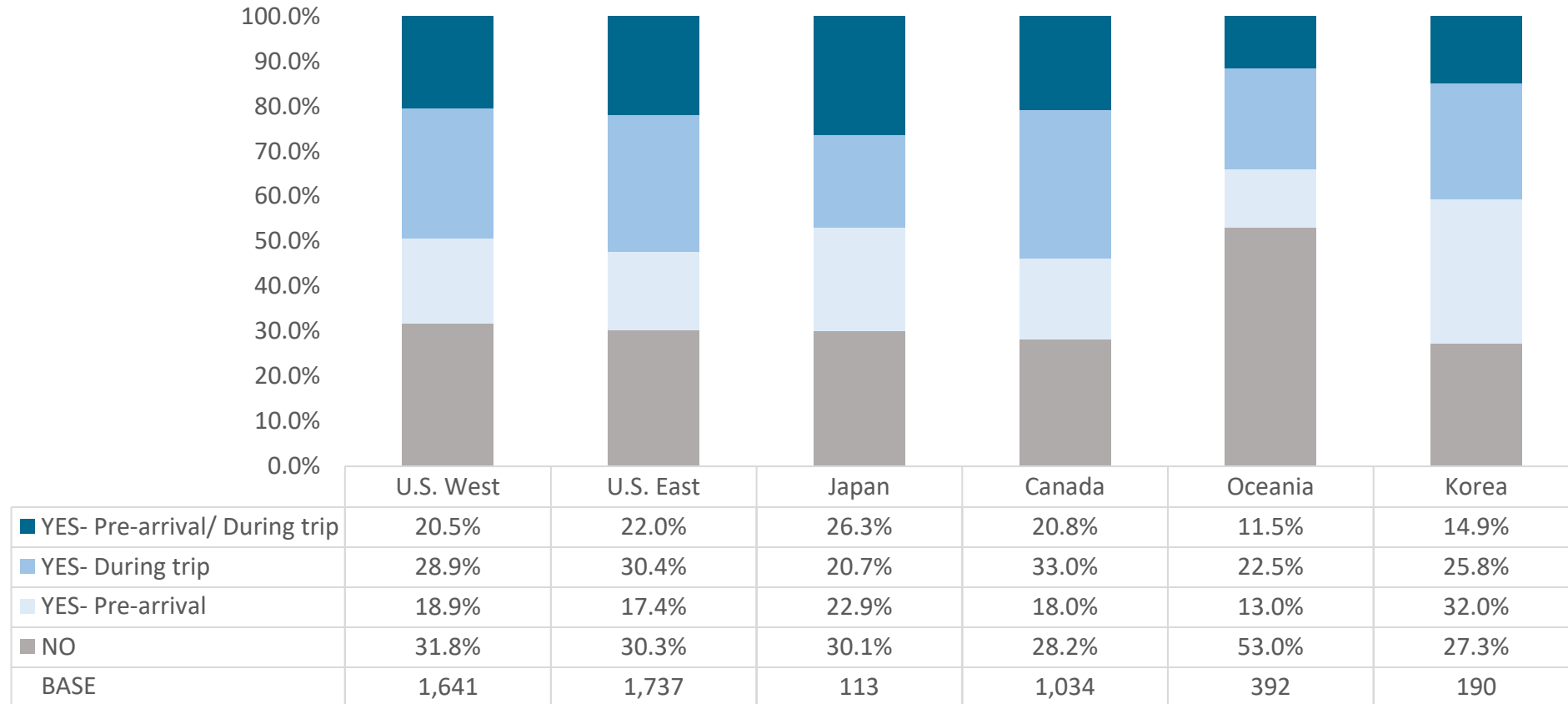
SAFE AND RESPONSIBLE TRAVEL



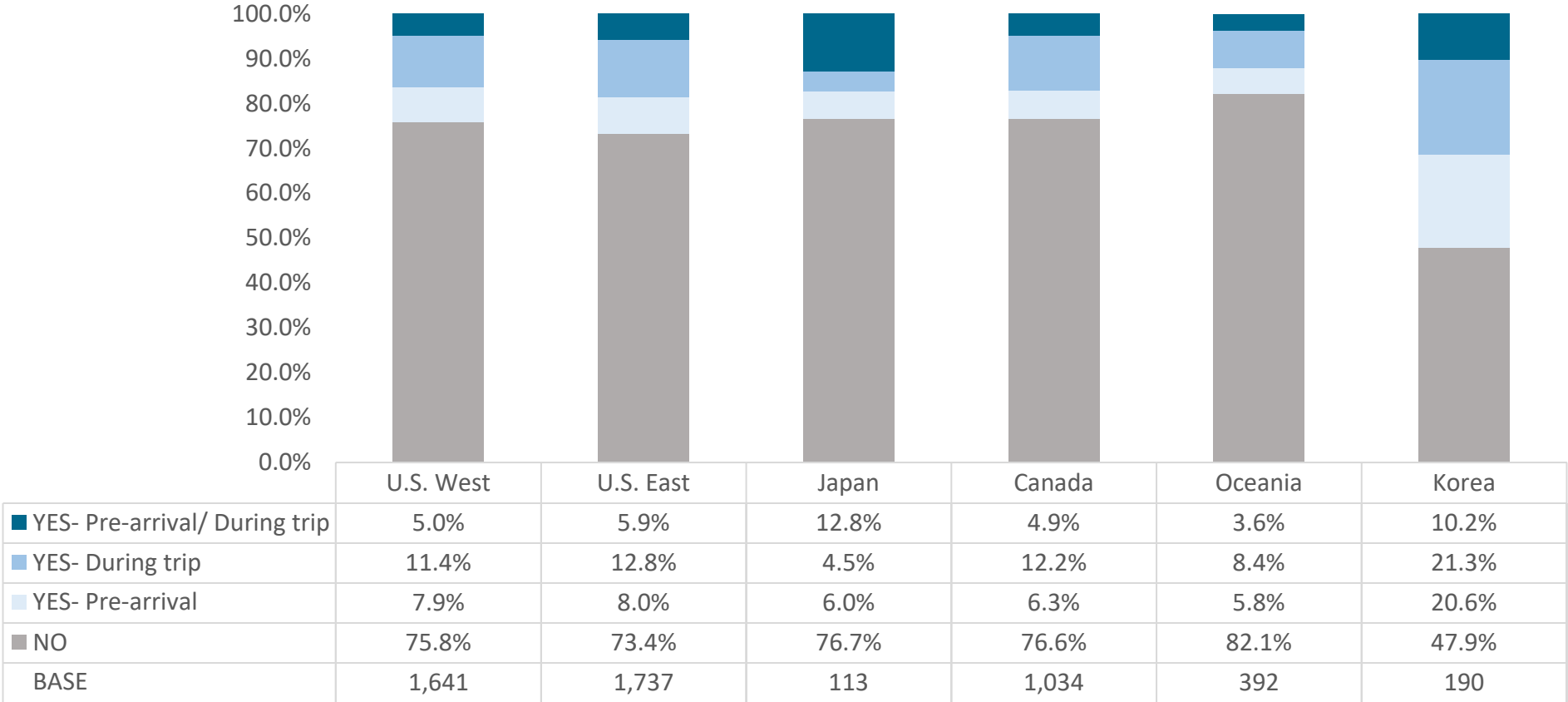
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE, AND ENVIRONMENT



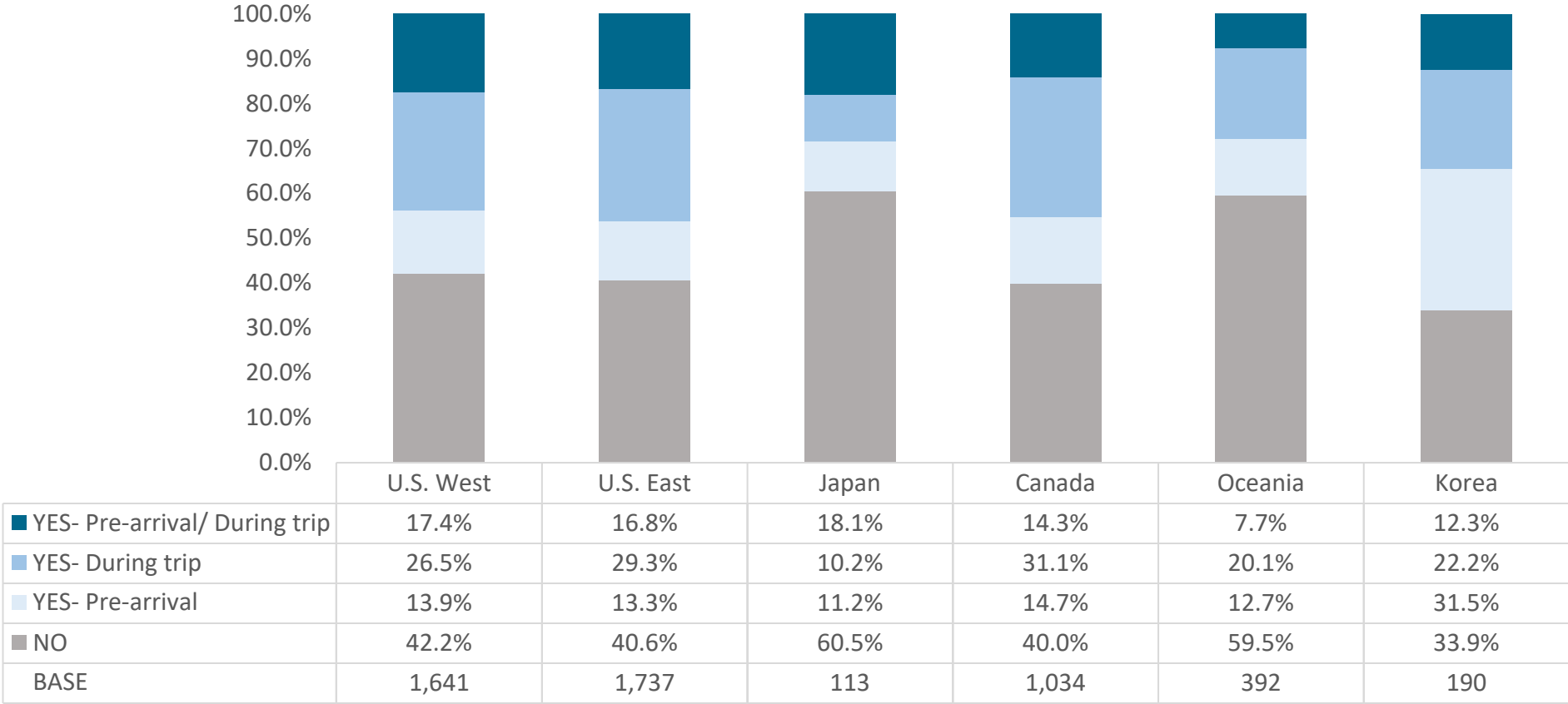
OCEAN AND HIKING SAFETY



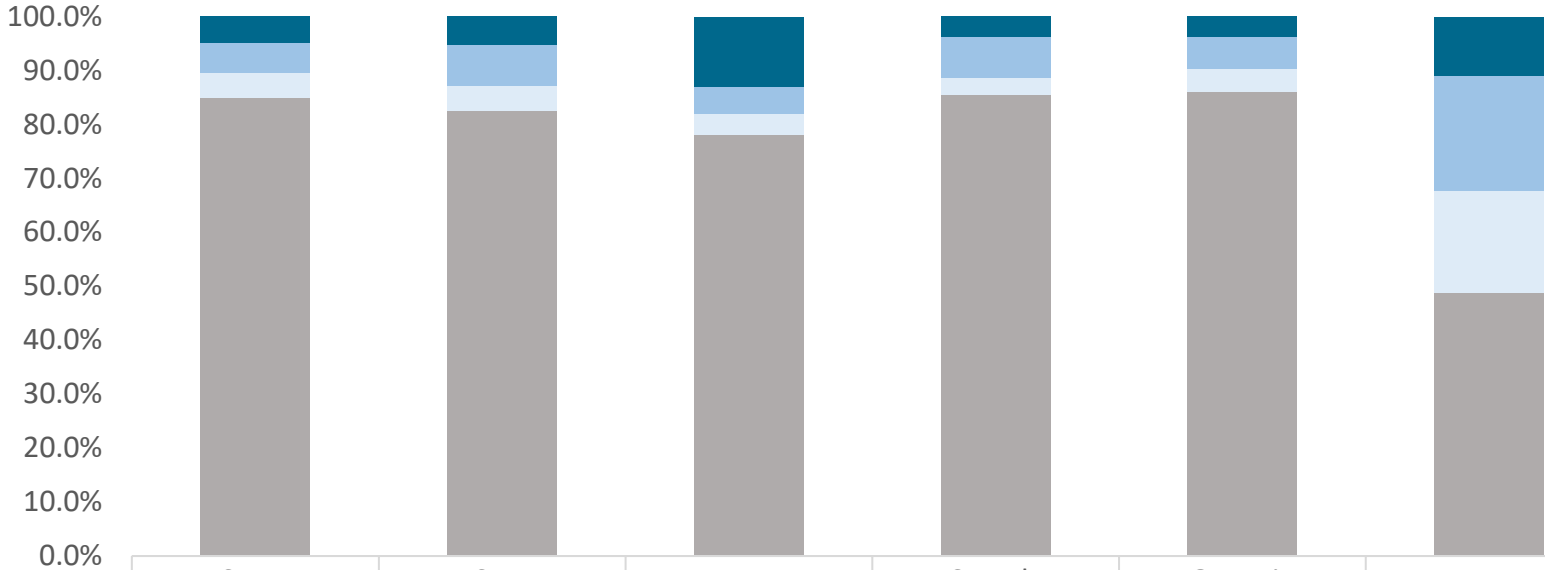
VOLUNTEER/ GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL/ SHOP LOCAL



MALAMA HAWAI'I

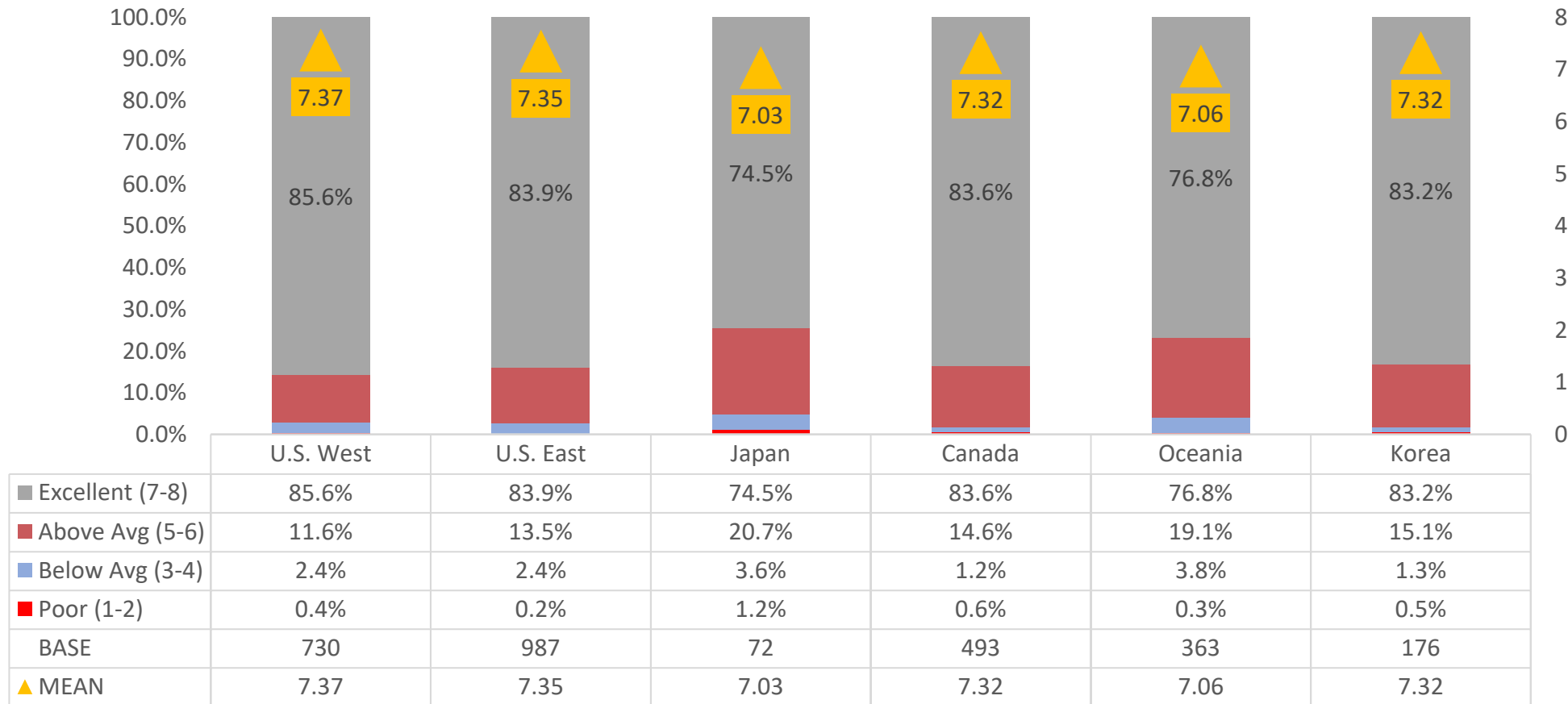


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
YES- Pre-arrival/ During trip	5.0%	5.2%	12.8%	3.9%	3.8%	10.9%
YES- During trip	5.5%	7.6%	5.2%	7.5%	5.9%	21.3%
YES- Pre-arrival	4.6%	4.7%	3.7%	3.2%	4.1%	18.9%
NO	84.9%	82.5%	78.2%	85.5%	86.2%	48.8%
BASE	1,641	1,737	113	1,034	392	190

Section 5 – O'AHU

SATISFACTION - O'AHU

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

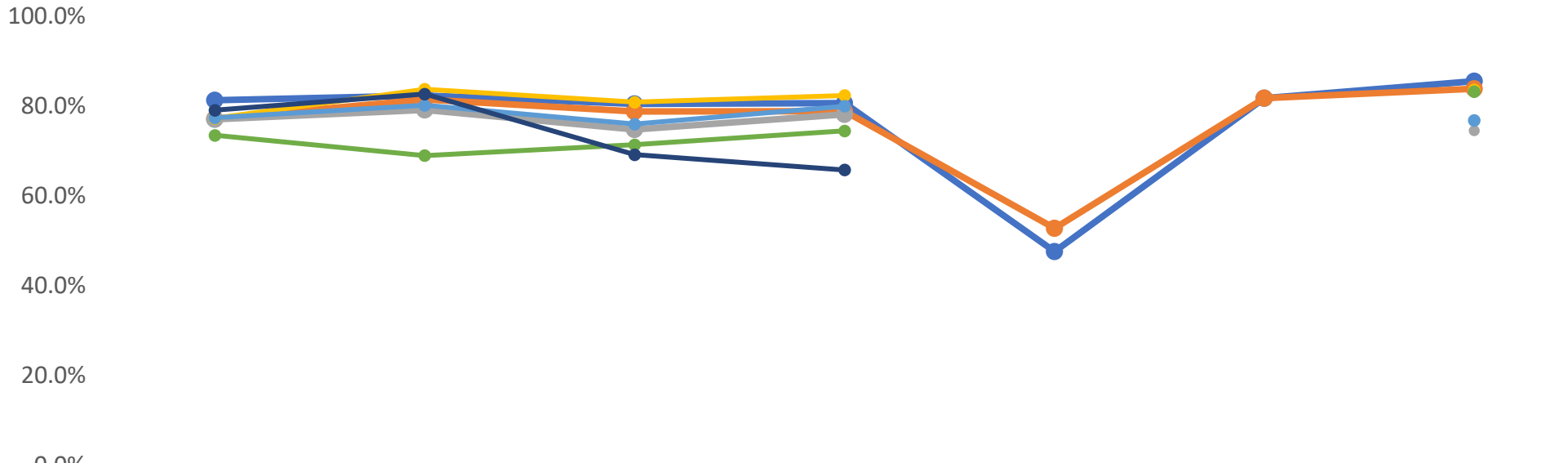


SATISFACTION - O'AHU

- **Islands visited:** Visitors from the following markets whose trip consisted of staying on just O'ahu gave the island a higher satisfaction score than those who also visited one of the Neighbor Islands during their stay: Korea, Oceania, U.S. East, and U.S. West.
- **Trips to Hawai'i:** Visitors from U.S. East that are first-time travelers to the state gave O'ahu higher satisfaction scores than repeat visitors.
- **Gender:** Female respondents from the U.S. East and U.S. West gave higher satisfaction scores when rating their stay on O'ahu.
- **Age:** Younger travelers from U.S. West were the most satisfied with their stay on the island than older segments from this visitor market.
- **Travel party size:** Visitors from U.S. West who came in larger travel party sizes were more satisfied with their stay compared to those in smaller travel groups.

SATISFACTION - O'AHU

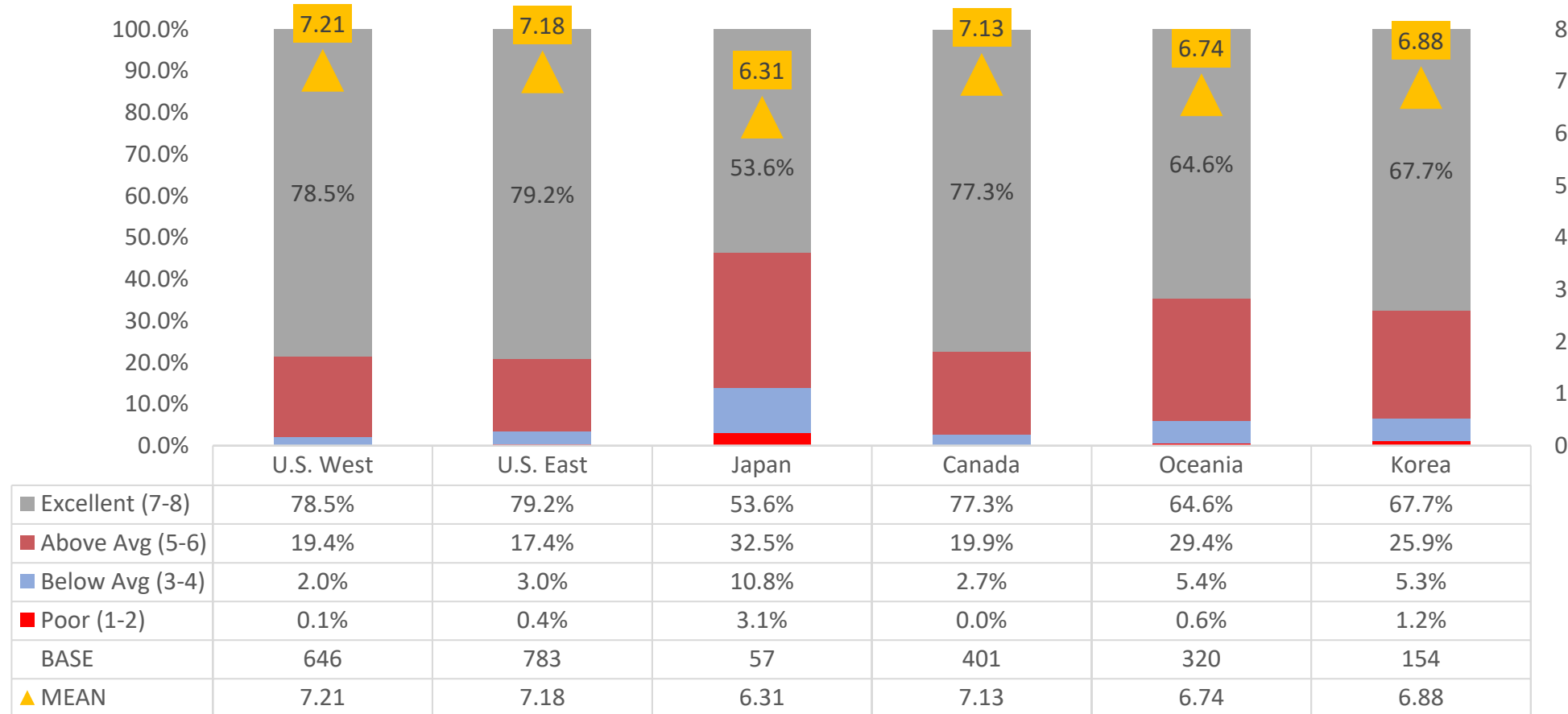
Tracking Data – Rating of “Excellent” (7-8)



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022 P
U.S. West	81.3%	82.4%	80.5%	80.7%	47.6%	81.8%	85.6%
U.S. East	77.2%	81.5%	78.8%	78.9%	52.8%	81.8%	83.9%
Japan	77.1%	79.2%	74.8%	78.2%			74.5%
Canada	77.3%	83.8%	80.9%	82.4%			83.6%
Oceania	77.4%	80.2%	76.0%	80.0%			76.8%
Korea	73.5%	69.0%	71.4%	74.5%			83.2%
China	79.1%	82.7%	69.2%	65.8%			

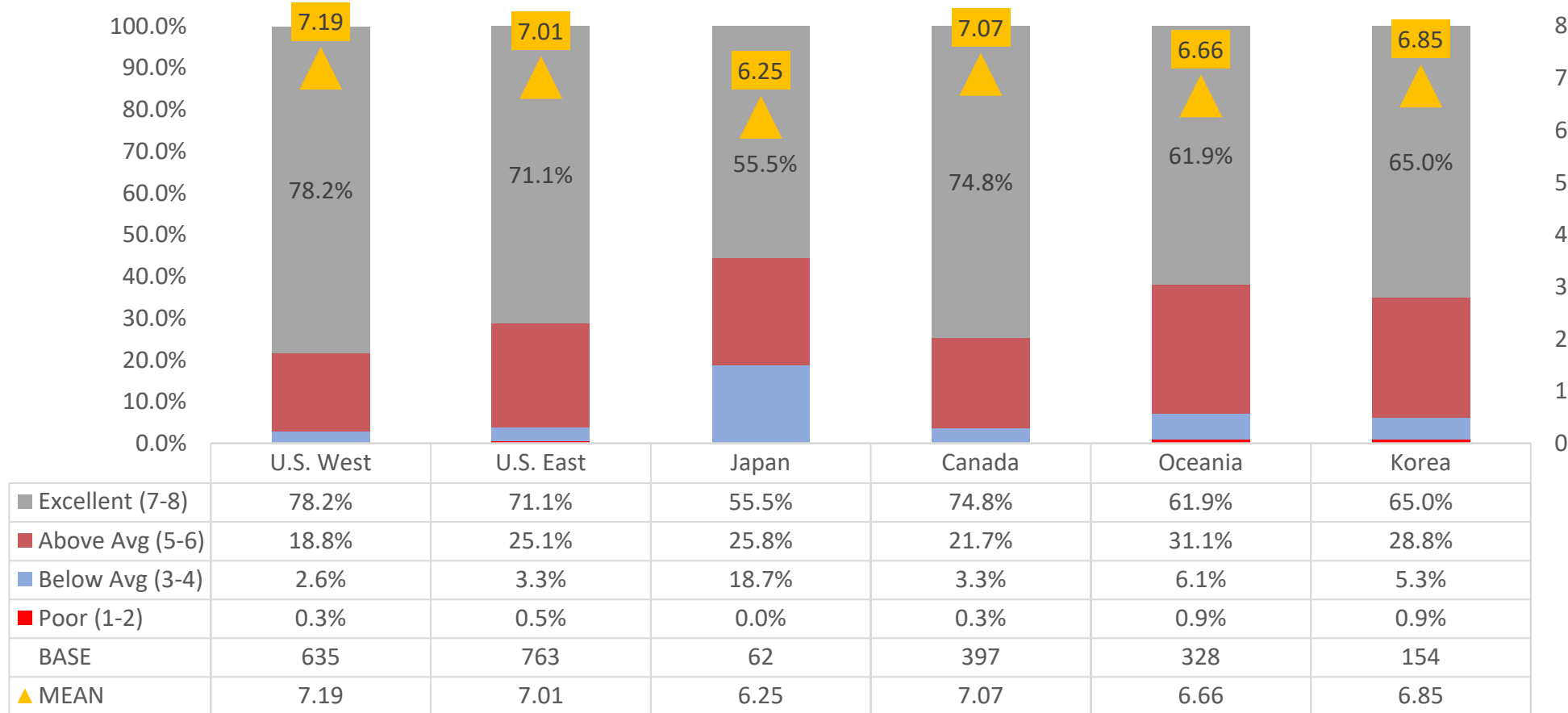
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



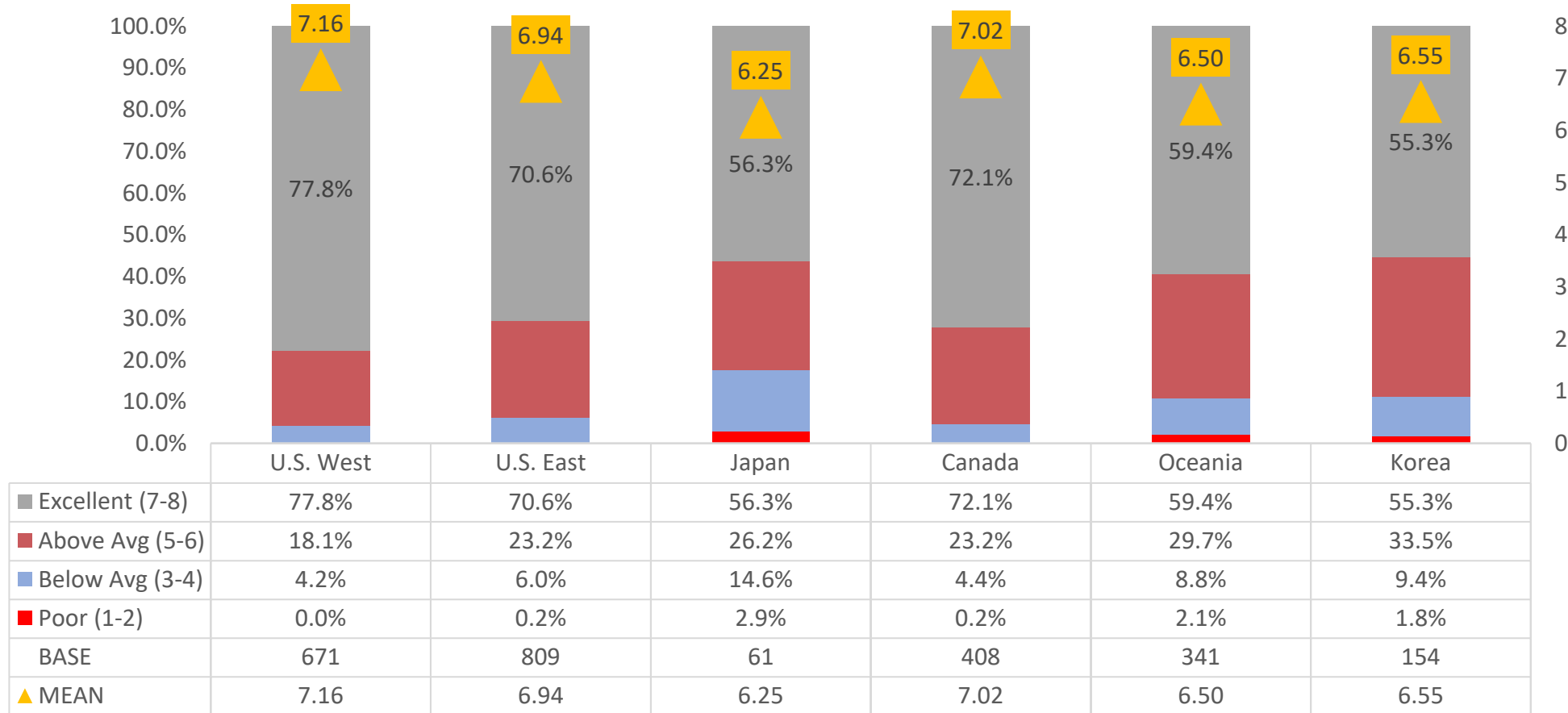
SHOPPING - O'AHU

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



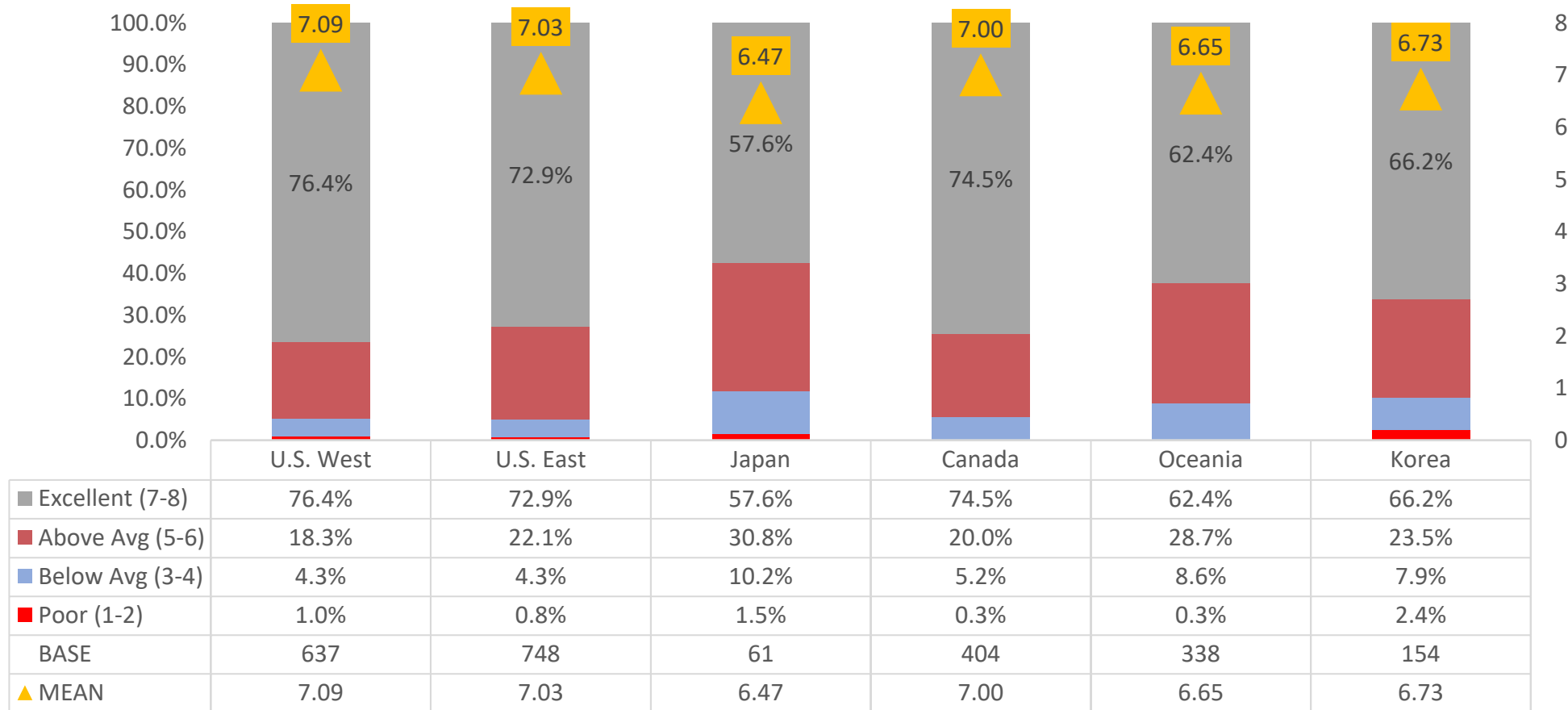
DINING/ FOOD & BEVERAGES - O'AHU

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



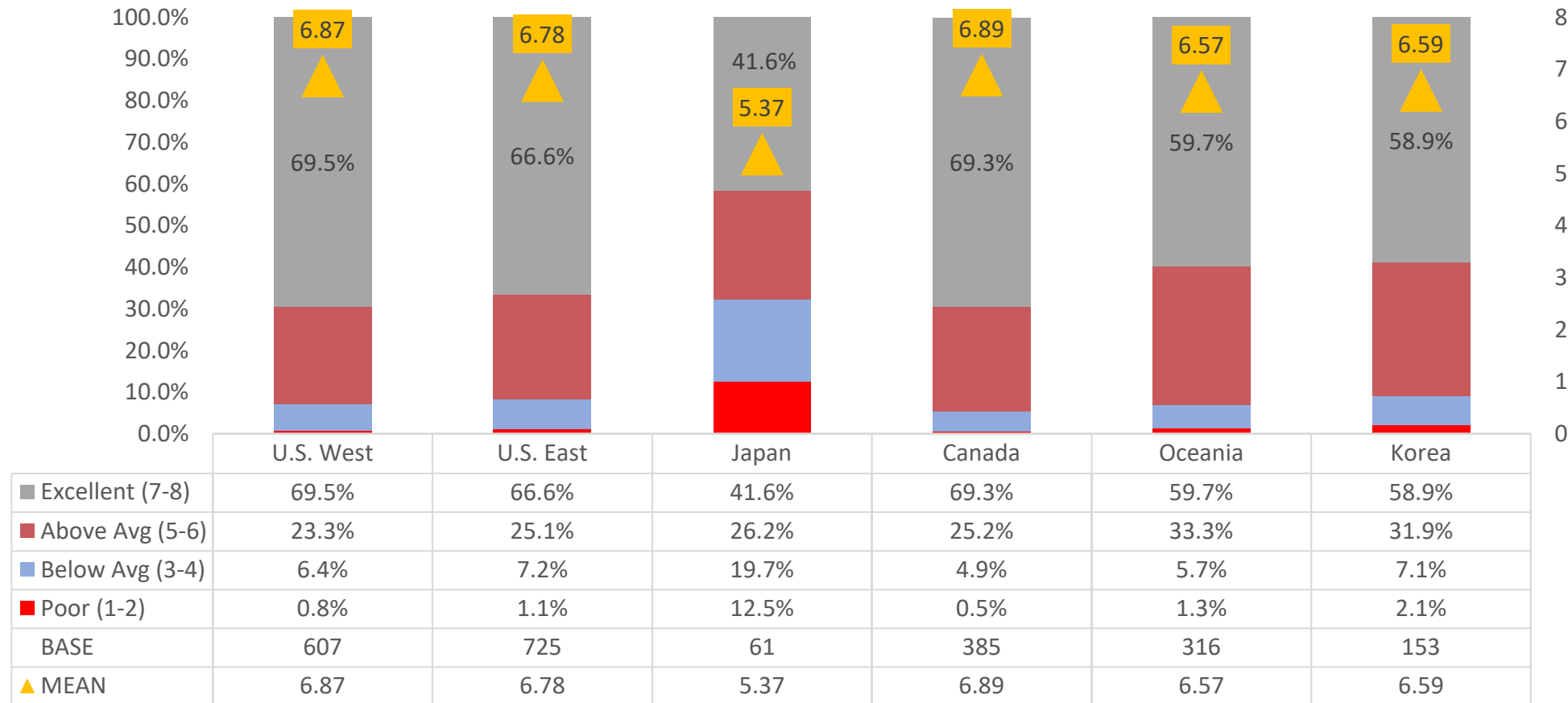
LODGING/ ACOMMODATIONS - O'AHU

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



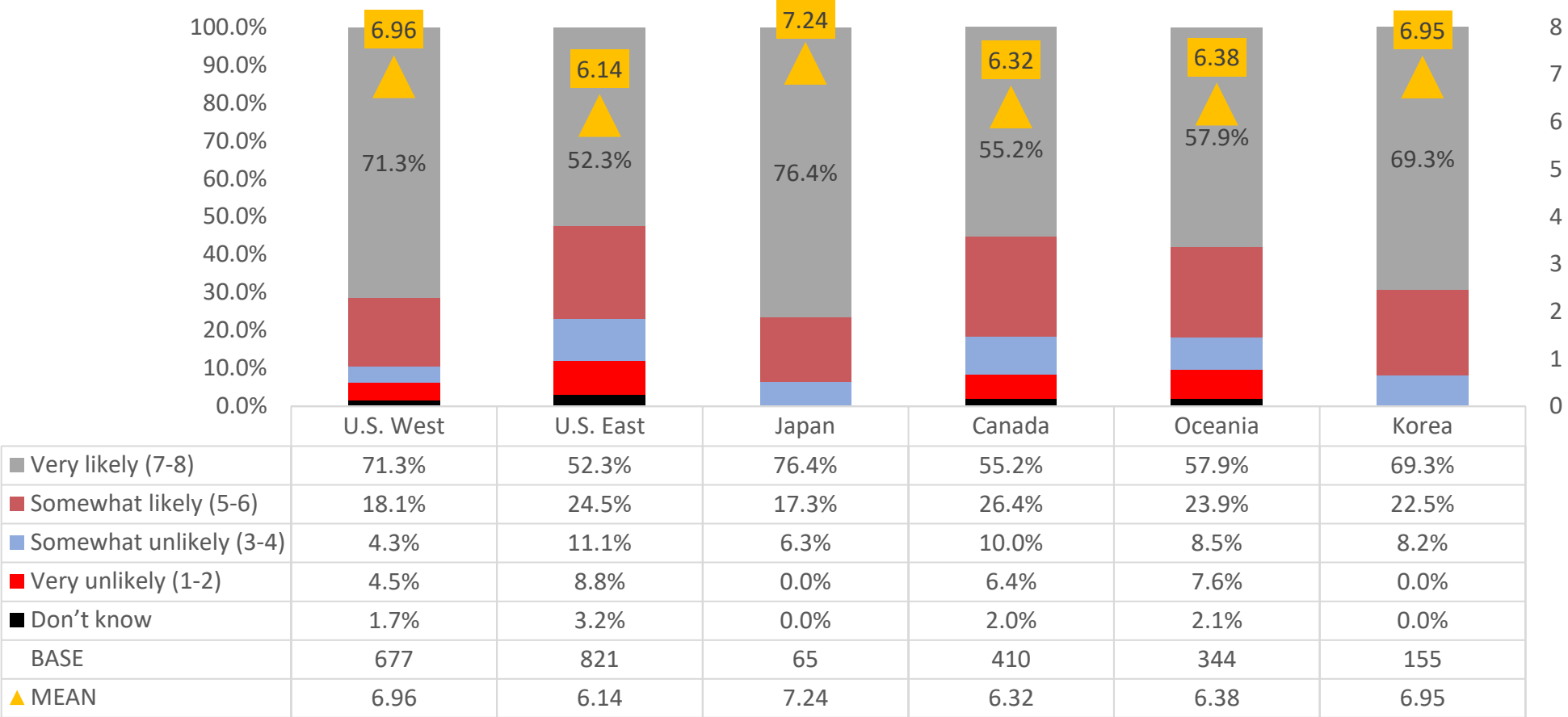
TRANSPORTATION ON ISLAND - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

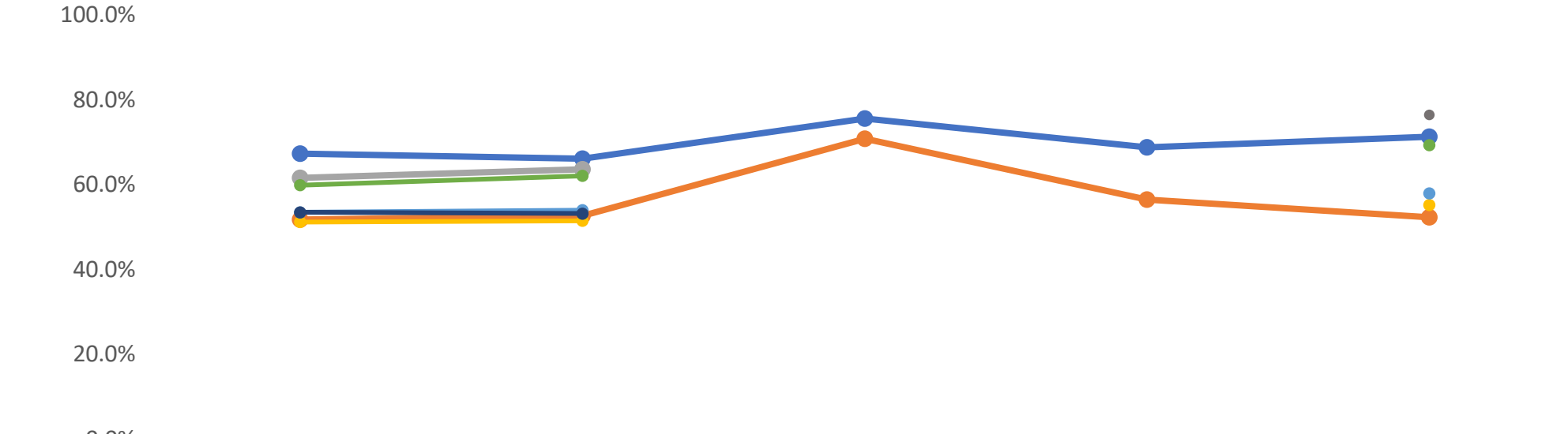
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



LIKELIHOOD OF RETURN VISIT - O'AHU

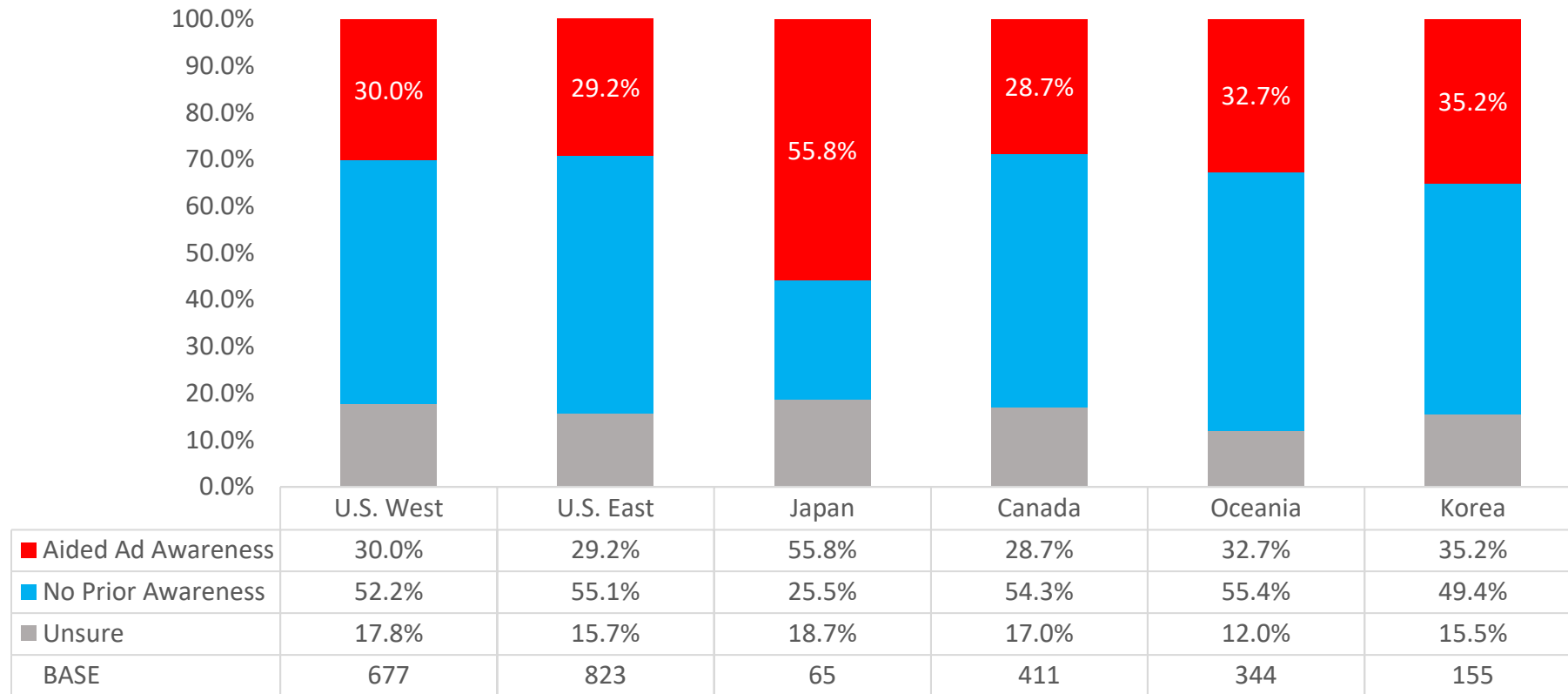
TOP BOX - VERY LIKELY (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022 P
U.S. West	67.3%	66.1%	75.6%	68.8%	71.3%
U.S. East	51.8%	52.7%	70.8%	56.5%	52.3%
Japan	61.6%	63.6%			76.4%
Canada	51.2%	51.5%			55.2%
Oceania	53.5%	54.0%			57.9%
Korea	59.9%	62.1%			69.3%
China	53.5%	53.2%			

AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	39.7%	43.6%	38.7%	49.2%	34.4%	45.3%
Hawaiian cultural events	15.7%	16.7%	18.7%	18.3%	9.6%	4.7%
Social media posts/ videos	16.5%	10.0%	34.6%	24.2%	11.1%	24.8%
Outdoor or sporting activities/ events	17.3%	10.7%	15.9%	18.0%	4.9%	8.7%
Television programs or movies filmed in Hawai'i	11.6%	10.4%	42.0%	23.4%	15.5%	16.1%
Hawaiian music	7.0%	5.7%	19.3%	8.2%	4.3%	4.1%
BASE	677	821	65	411	344	155

ATTRACTIONS- O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Atlantis Submarine & Cruises	3.2%	4.5%	1.4%	3.0%	2.3%	9.7%
Bernice P. Bishop Museum	2.7%	4.2%	1.4%	2.0%	2.6%	3.2%
Byodo In Temple	11.9%	13.8%	6.4%	18.8%	7.1%	1.5%
Chinatown & Honolulu Art District	12.3%	13.3%	18.9%	15.2%	9.9%	3.5%
Diamond Head State Monument	24.4%	34.7%	22.5%	44.9%	24.6%	36.6%
Dole Plantation	33.8%	39.4%	7.0%	45.7%	22.8%	40.9%
Foster Botanical Garden	4.1%	5.5%	0.0%	4.7%	2.3%	1.2%
Haleiwa	20.4%	24.5%	29.5%	23.5%	12.5%	12.6%
Hanauma Bay Nature Reserve	10.1%	10.6%	19.7%	19.1%	6.4%	17.8%
Harold L. Lyon Arboretum	0.1%	0.9%	0.0%	0.7%	0.0%	4.4%
Hawai'i State Art Museum	0.9%	1.5%	5.0%	1.7%	1.8%	4.1%
Honolulu Museum of Art	2.7%	2.0%	15.5%	2.5%	2.7%	1.2%
Hawaiian Mission Houses, Historic Site and Archive	1.0%	1.2%	0.0%	1.2%	1.2%	2.9%
Hawai'i's Plantation Village	3.6%	3.2%	0.0%	2.7%	1.5%	3.8%
Honolulu Zoo	7.3%	9.2%	1.4%	7.8%	7.8%	7.3%

ATTRACTIONS- O'AHU

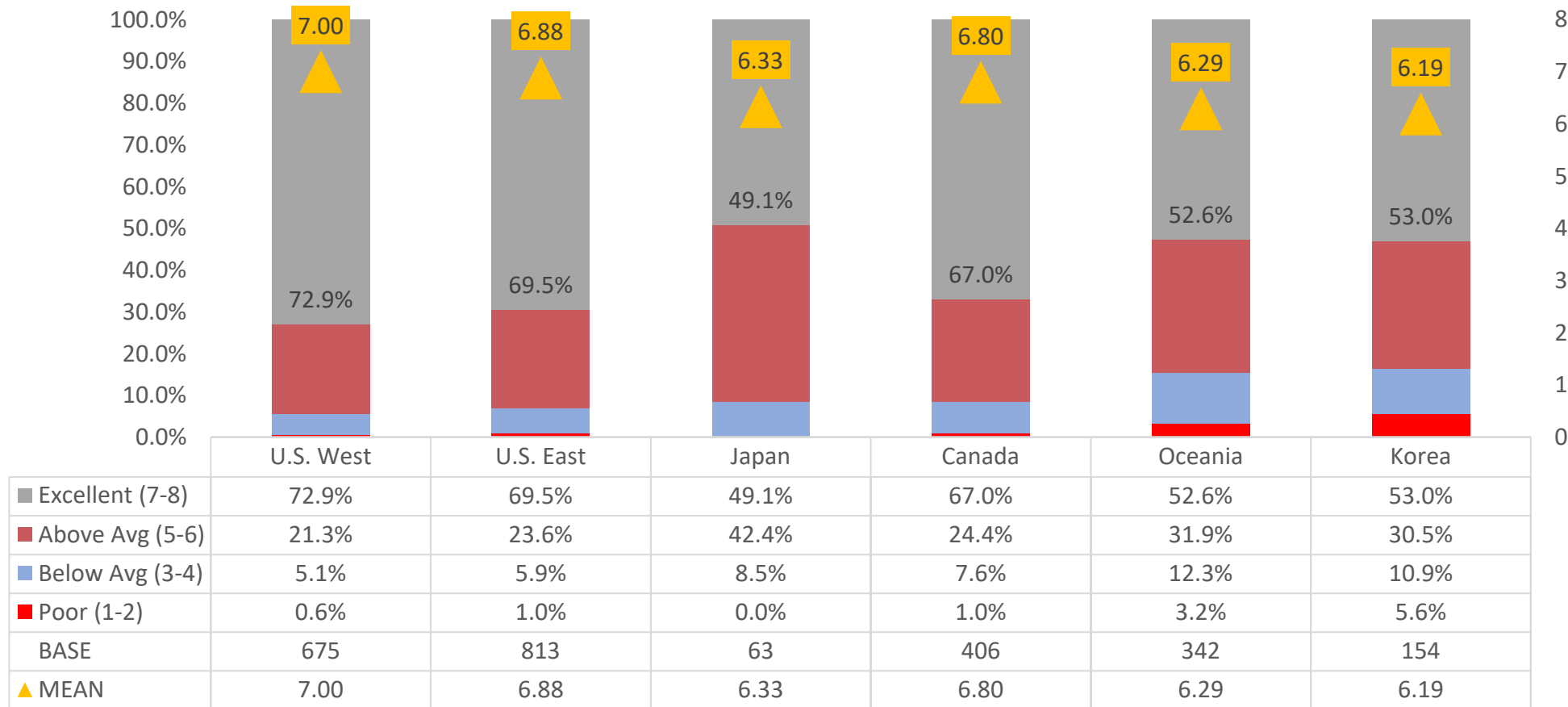
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Ho'omaluhia Botanical Garden	5.5%	6.1%	0.0%	11.3%	3.2%	3.5%
Iolani Palace State Monument	5.1%	7.4%	10.6%	4.9%	3.3%	17.2%
Kailua Town	13.6%	15.0%	15.3%	15.0%	7.0%	8.2%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	4.1%	7.0%	7.8%	8.8%	2.3%	2.6%
Kaka'ako Street Art	1.6%	2.7%	16.1%	1.5%	2.0%	7.3%
Koko Head Crater Trail	5.7%	9.3%	4.2%	11.3%	5.0%	8.8%
Kualoa Private Nature Reserve	12.6%	16.2%	4.2%	26.1%	11.7%	14.0%
Lanikai or Kailua Beach	29.1%	28.0%	34.4%	38.8%	12.8%	25.4%
Manoa Falls & Trail	11.7%	13.6%	7.8%	16.2%	3.9%	5.3%
National Memorial Cemetery of the Pacific	9.1%	13.4%	0.0%	8.1%	7.6%	4.1%
Nu'uuanu Pali Lookout	11.1%	15.7%	0.0%	17.0%	6.5%	13.8%
North Shore Beaches	45.2%	48.0%	30.9%	54.7%	28.8%	25.1%

ATTRACTIONS- O'AHU

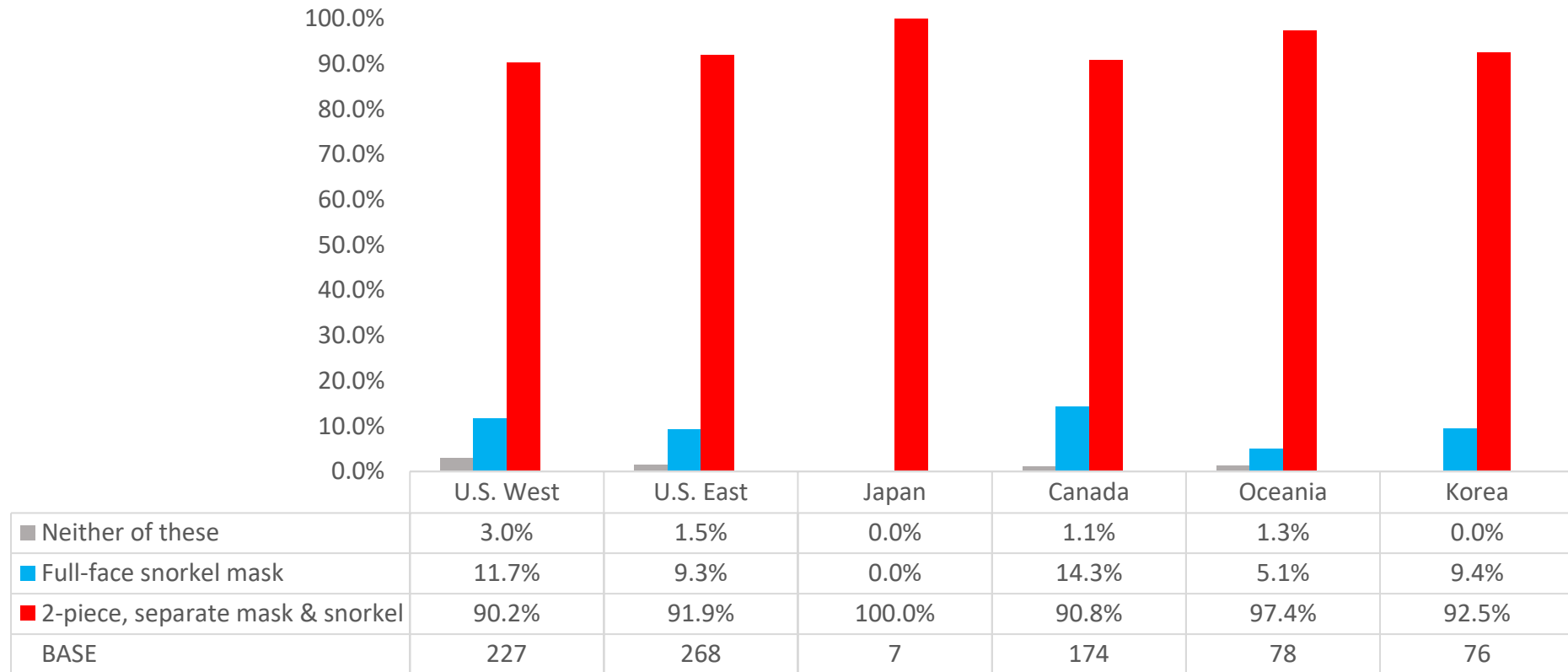
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Pearl Harbor National Memorial	32.2%	49.2%	12.7%	42.3%	30.6%	10.9%
Battleship Missouri Memorial	11.9%	24.4%	6.4%	19.2%	15.0%	5.9%
Pearl Harbor Aviation Museum	13.0%	19.5%	7.8%	14.5%	12.1%	9.4%
Pacific Fleet Submarine Museum	5.3%	7.8%	0.0%	7.1%	6.2%	5.9%
Polynesian Cultural Center	15.9%	18.6%	1.4%	19.2%	9.4%	7.3%
Queen Emma's Summer Palace	1.7%	2.2%	0.0%	1.5%	1.5%	5.9%
Sea Life Park Hawai'i	4.8%	6.4%	0.0%	5.2%	3.2%	7.9%
Waikiki Aquarium	3.4%	4.9%	0.0%	4.7%	2.9%	2.4%
Waimanalo Beach Park	10.3%	9.1%	4.2%	16.7%	6.2%	7.0%
Waimea Valley	18.3%	19.7%	10.6%	23.5%	12.9%	7.3%

DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



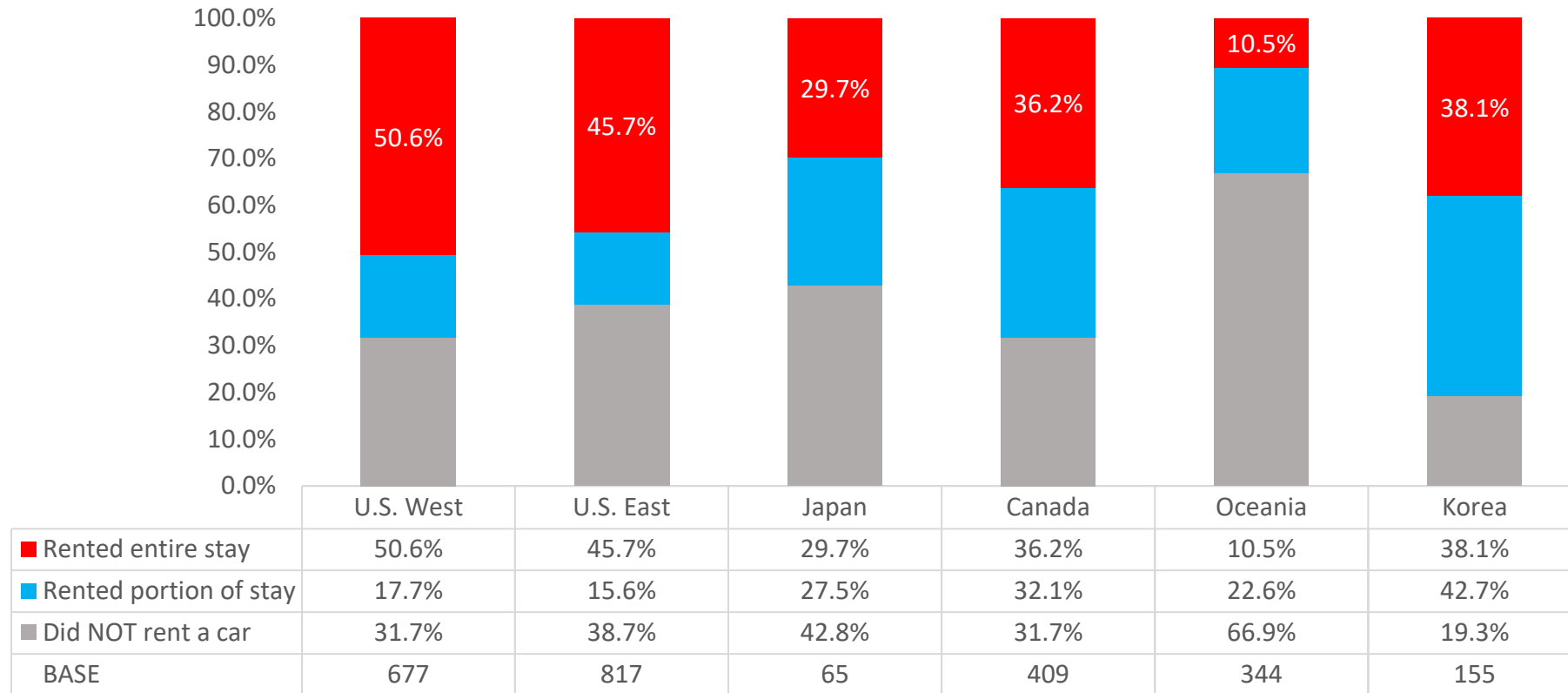
SNORKELING EQUIPMENT USED - O'AHU



SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	99.0%	95.9%	100.0%	98.3%	100.0%	98.7%
Yes, needed assistance using 2 piece mask & snorkel	1.0%	3.7%	0.0%	1.7%	0.0%	1.3%
Yes, while snorkeling using a full face snorkel mask	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
BASE	220	264	7	172	77	76

CAR RENTAL - O'AHU



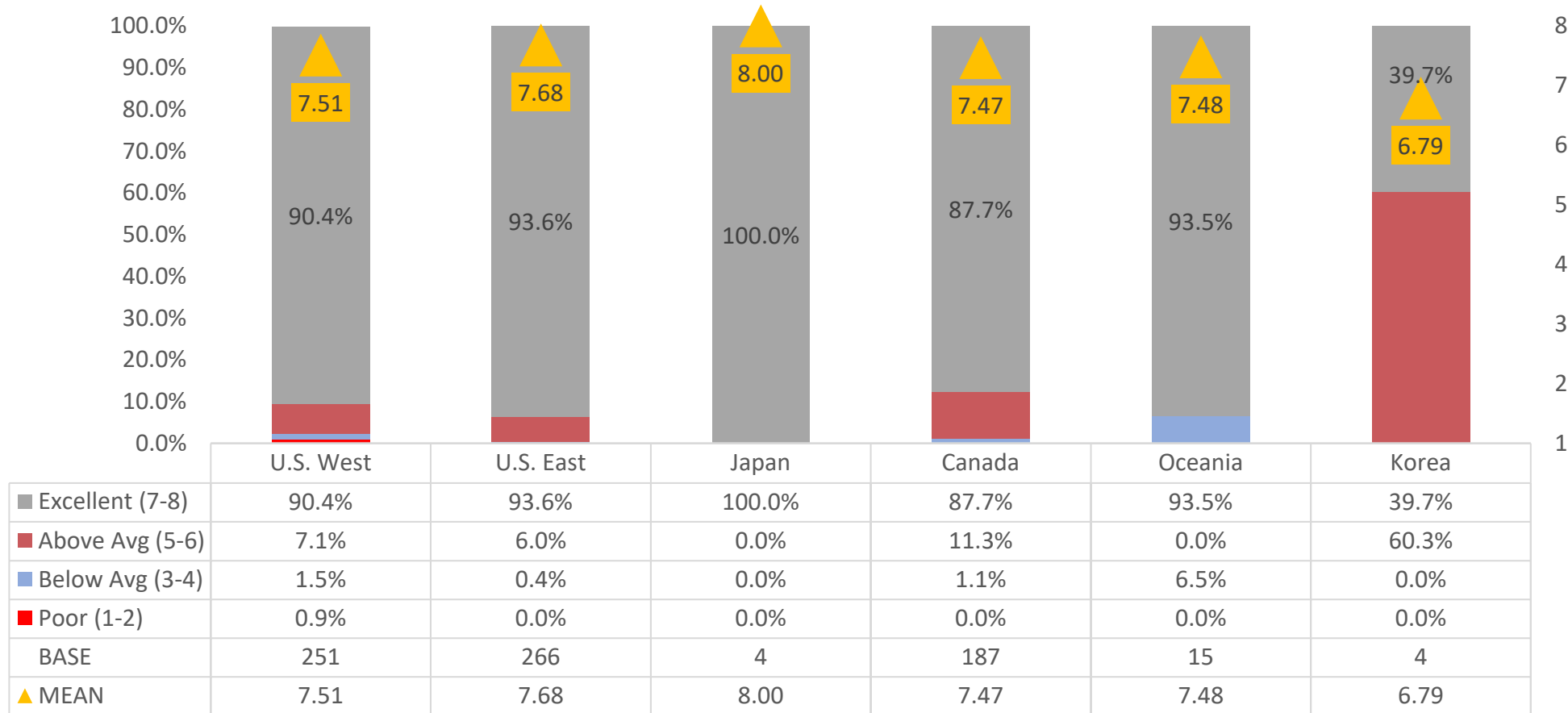
REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
I only needed a vehicle on certain days	70.2%	71.1%	60.0%	69.4%	80.7%	57.5%
Parking was too expensive at my hotel/ lodging	42.0%	36.9%	25.0%	46.6%	29.4%	28.1%
Car rental rates were too expensive	30.2%	23.5%	40.0%	41.9%	32.0%	28.7%
Vehicles were not available for all of my trip dates	5.7%	8.0%	0.0%	5.4%	7.7%	13.0%
BASE	119	127	20	131	78	68

Section 6 – KAUA'I

SATISFACTION - KAUUA'I

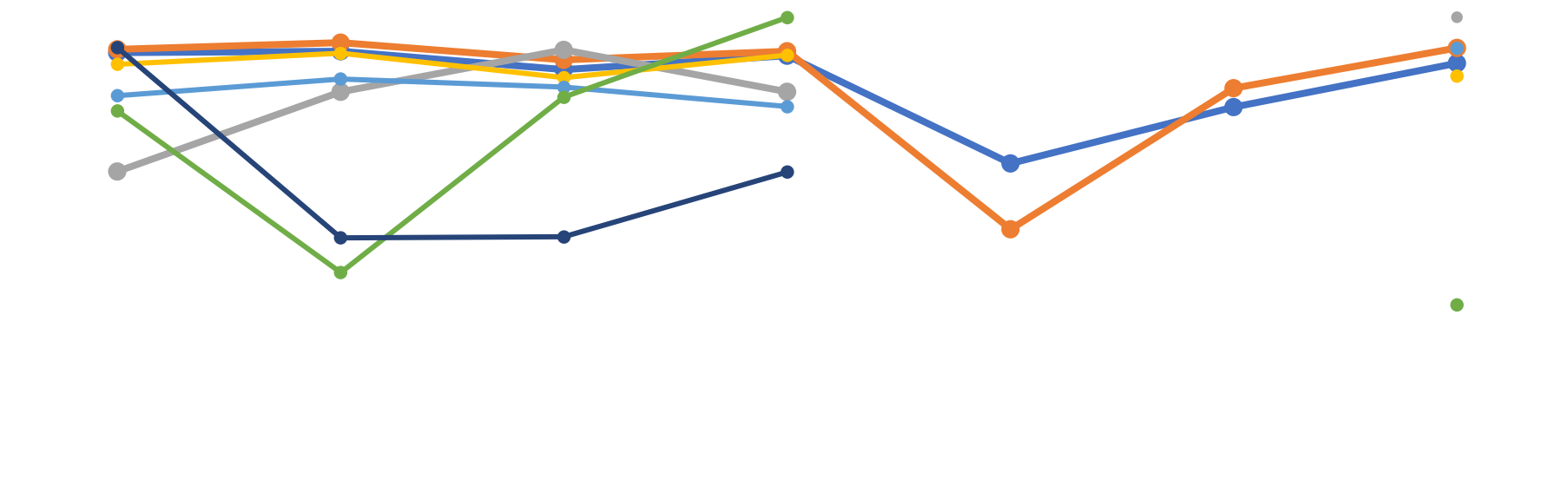
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION - KAUUA'I

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

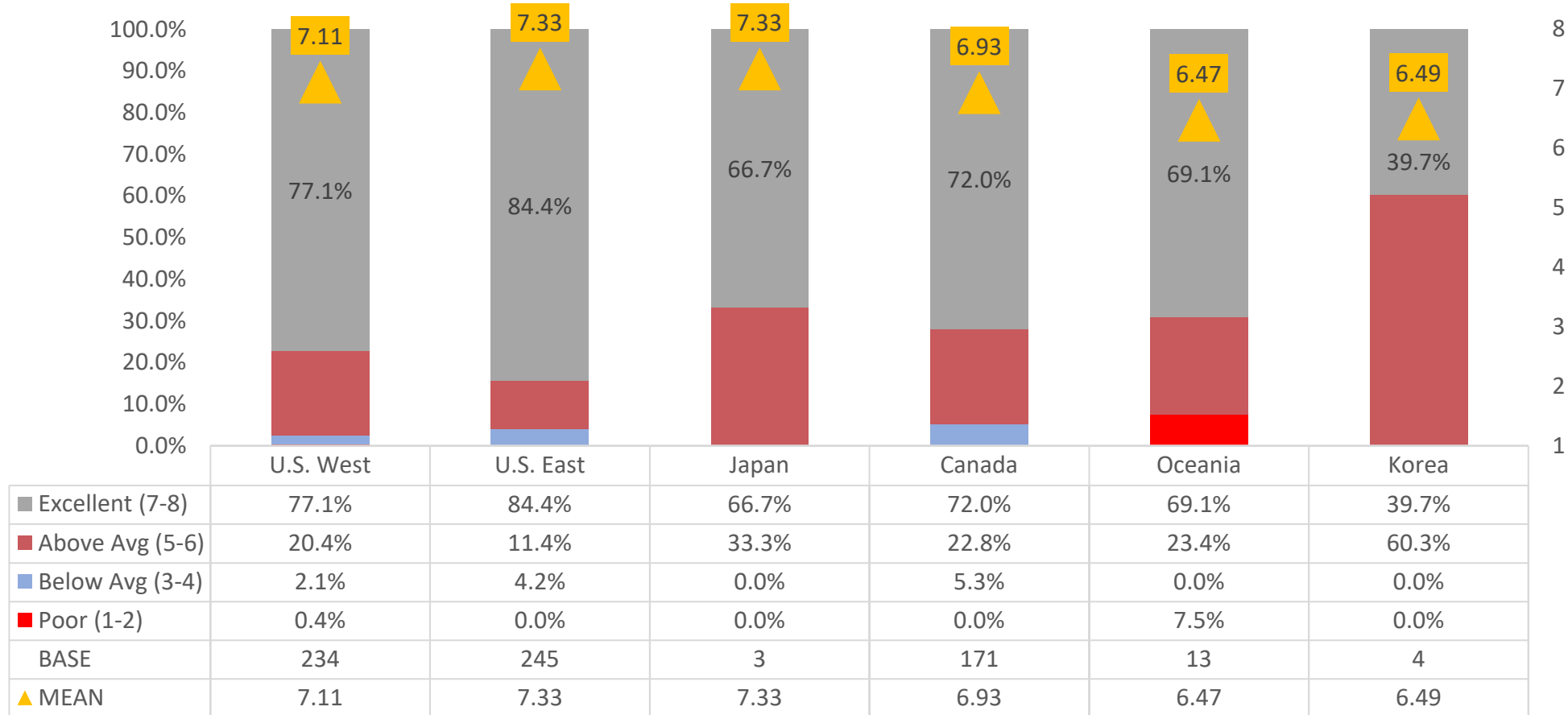
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022 P
U.S. West	92.6%	92.9%	89.1%	92.0%	69.4%	81.2%	90.4%
U.S. East	93.3%	94.7%	91.1%	92.9%	55.6%	85.2%	93.6%
Japan	67.7%	84.4%	93.2%	84.4%			100.0%
Canada	90.2%	92.5%	87.4%	92.1%			87.7%
Oceania	83.6%	87.1%	85.4%	81.3%			93.5%
Korea	80.4%	46.5%	83.3%	100.0%			39.7%
China	93.7%	53.8%	54.0%	67.6%			

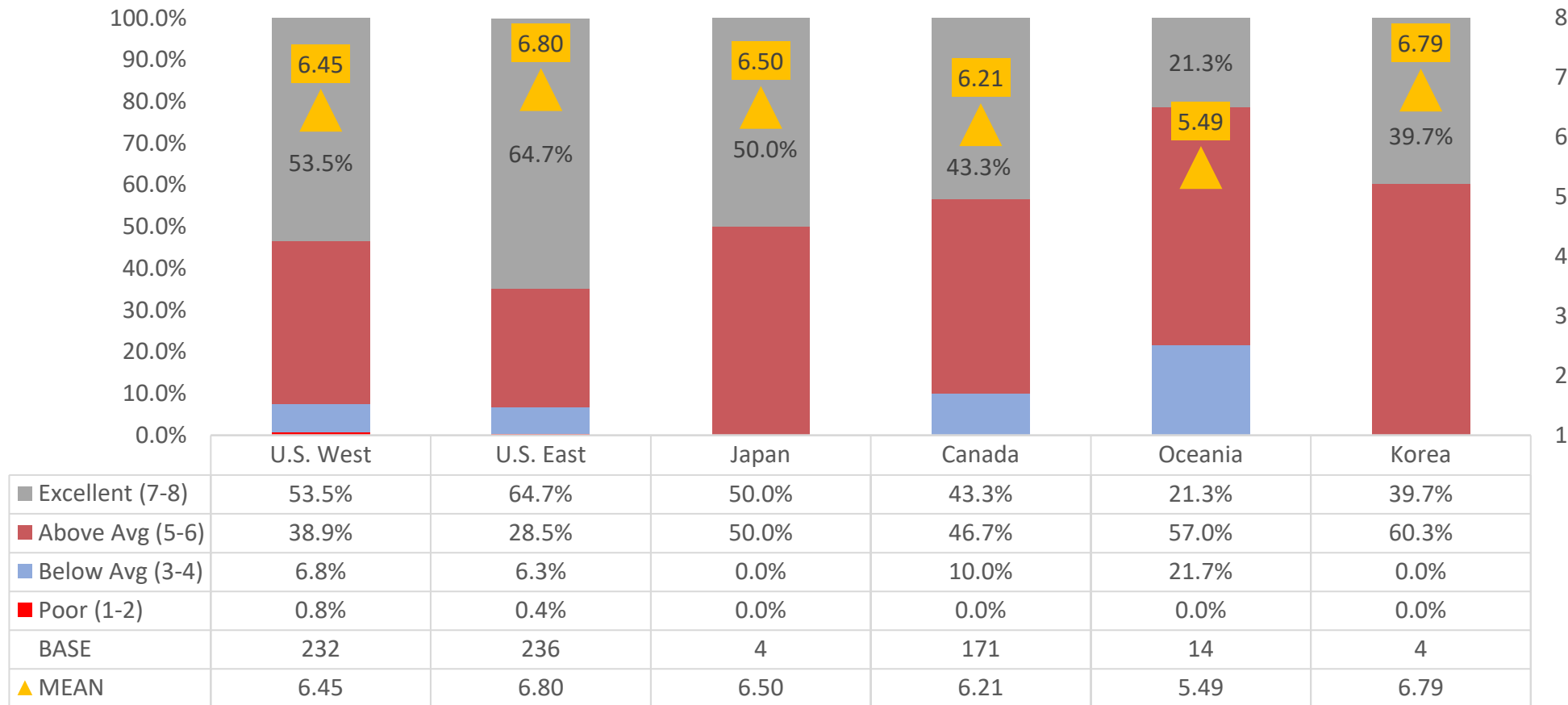
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



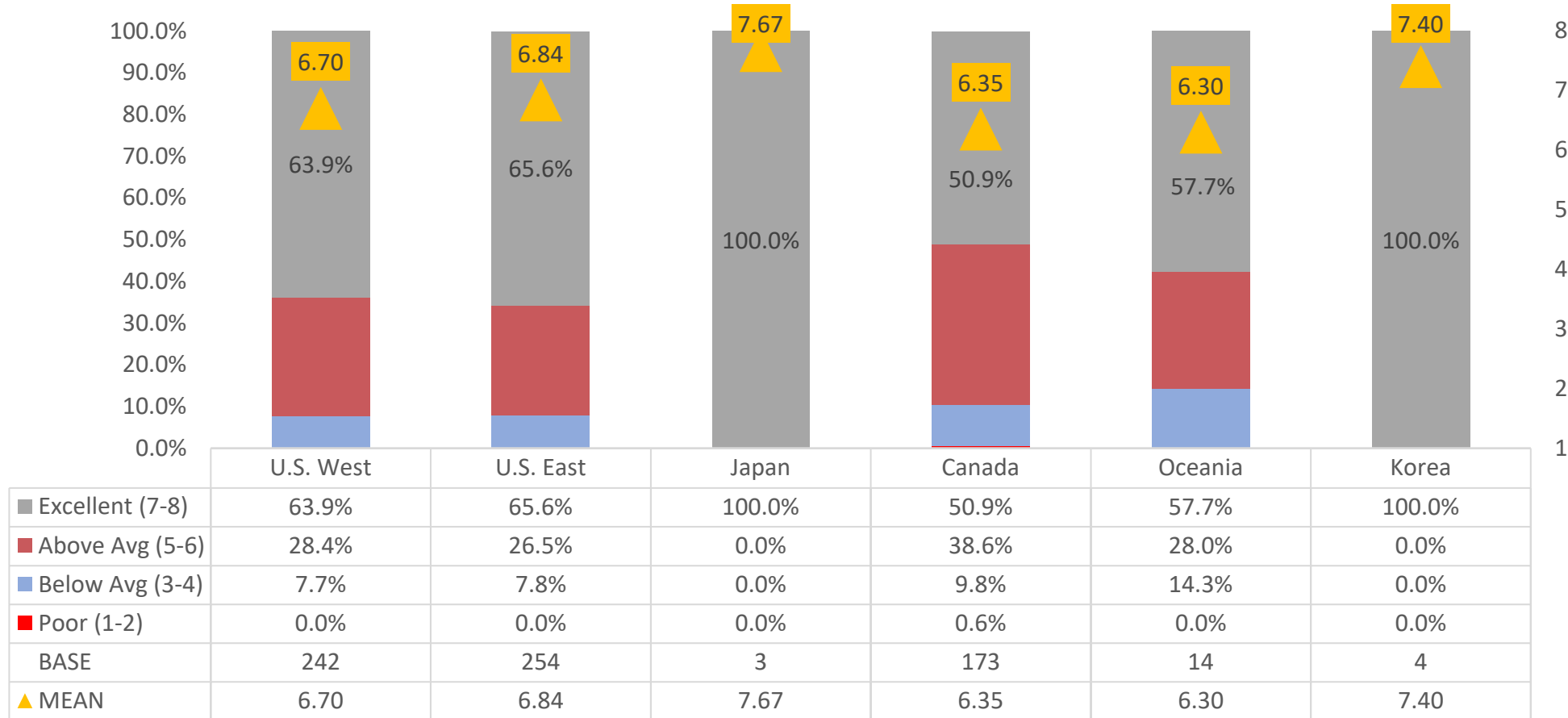
SHOPPING - KAUA'I

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



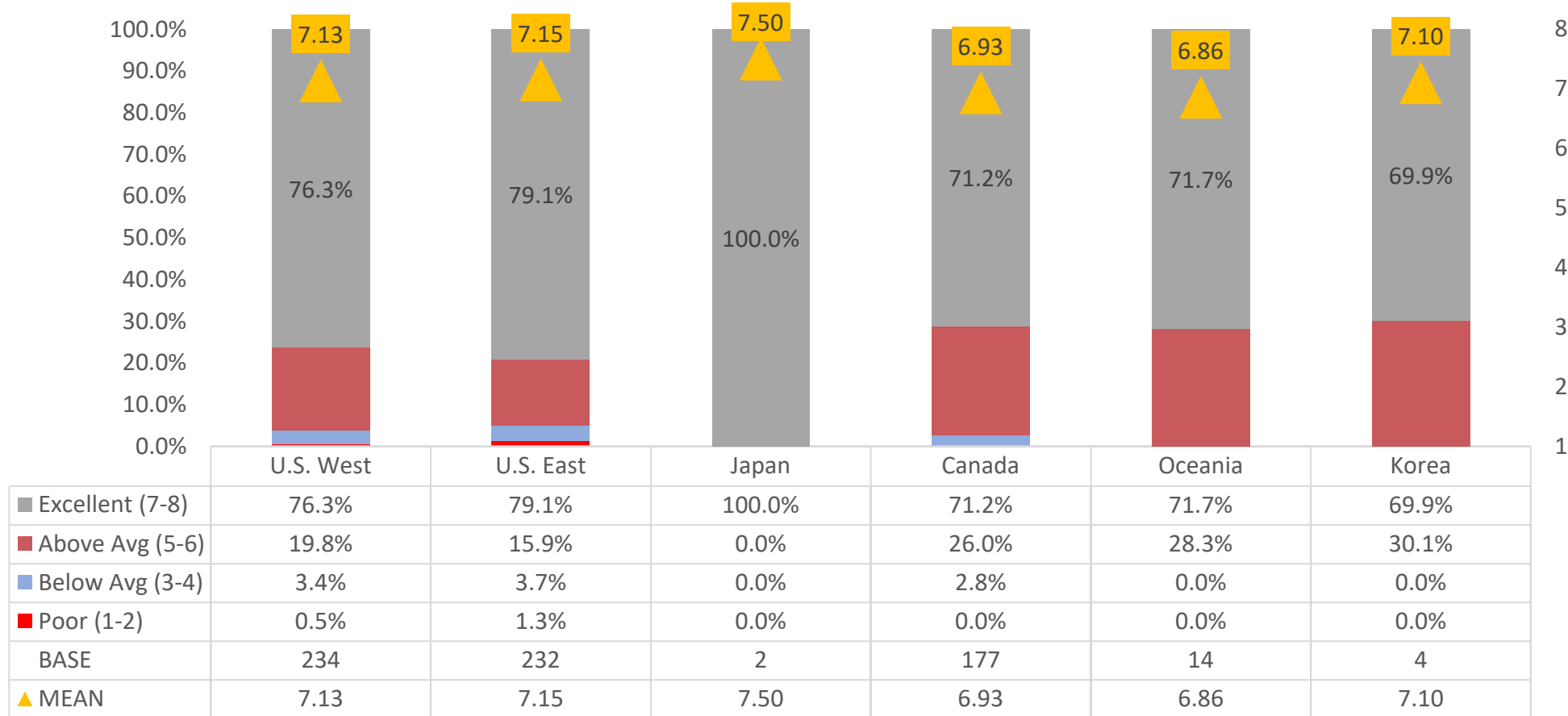
DINING/ FOOD & BEVERAGE - KAUA'I

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



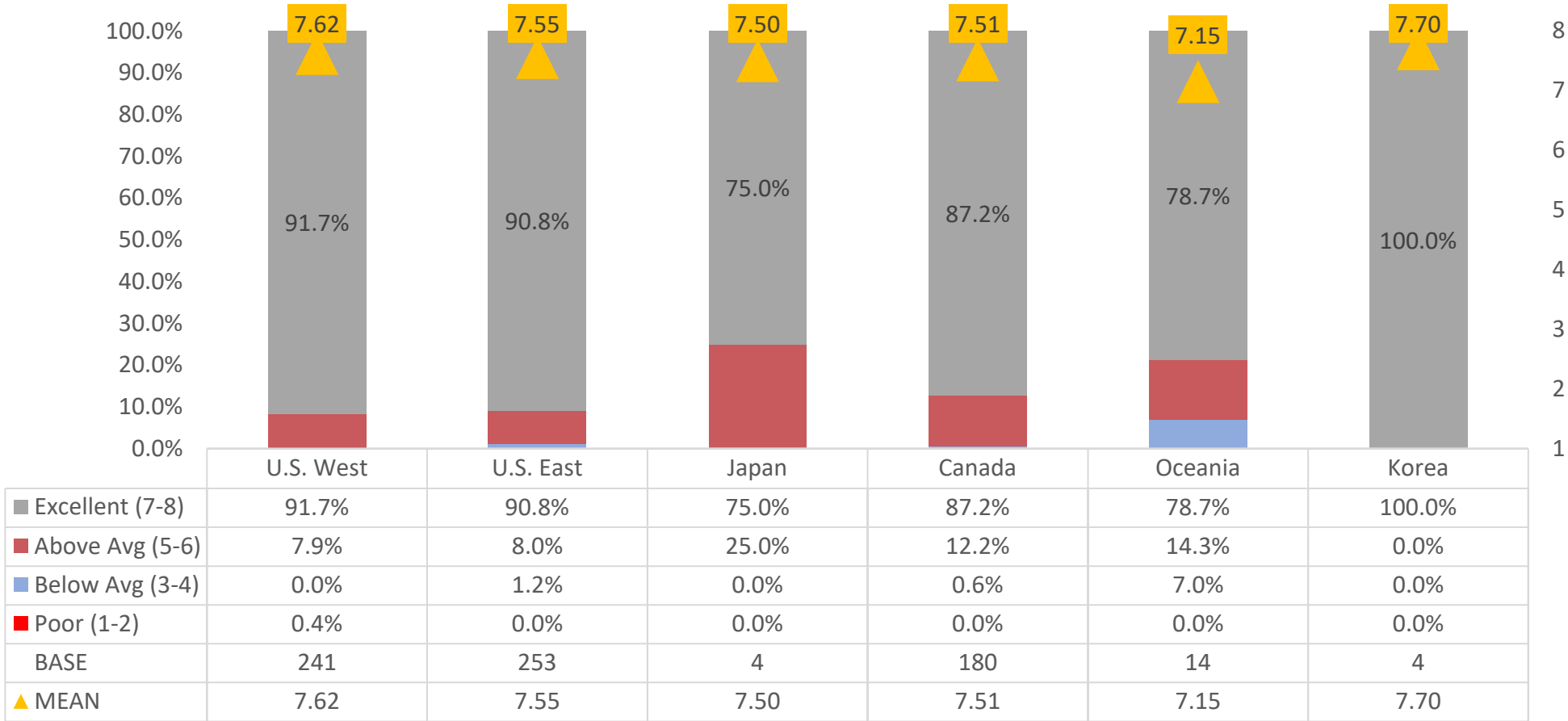
LODGING/ ACCOMMODATIONS - KAUA'I

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



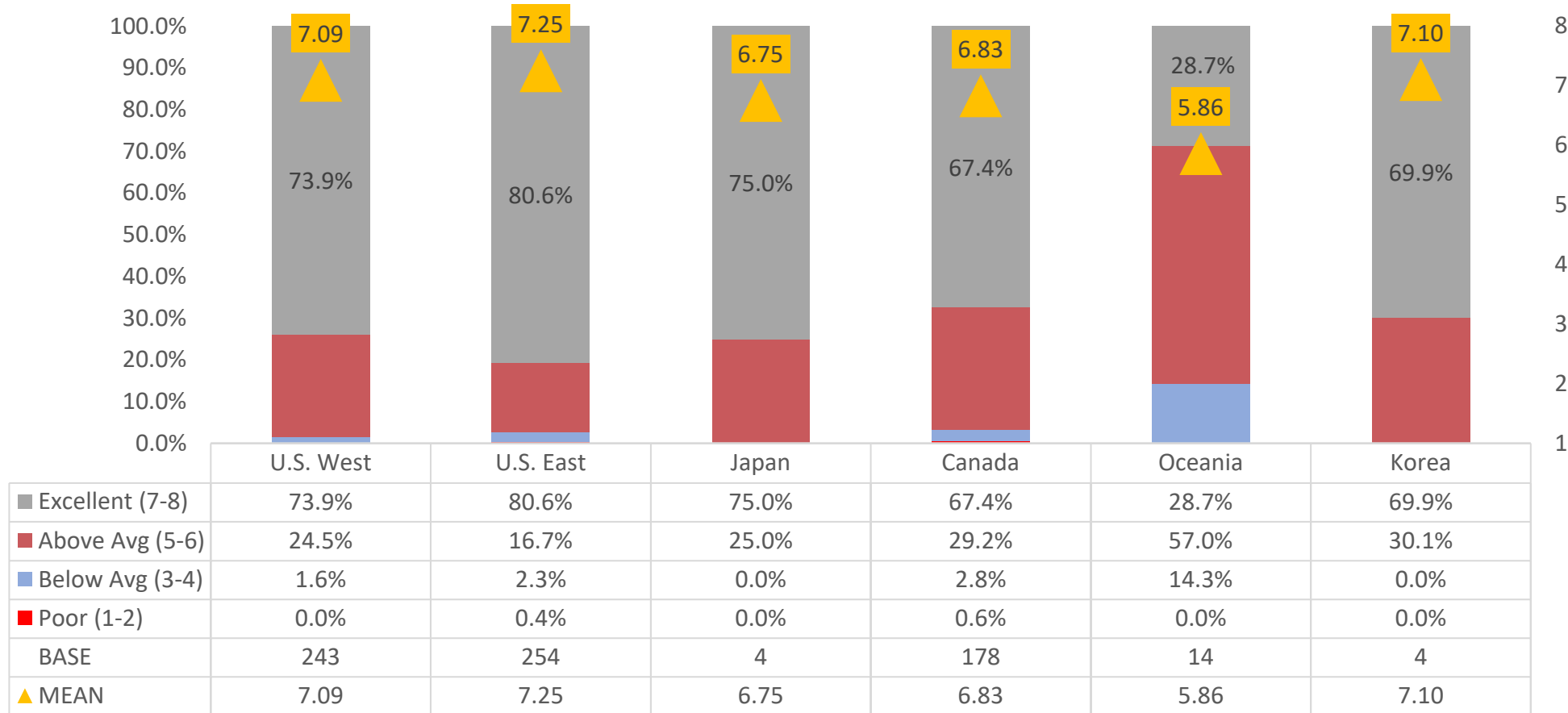
BEACHES - KAUA'I

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



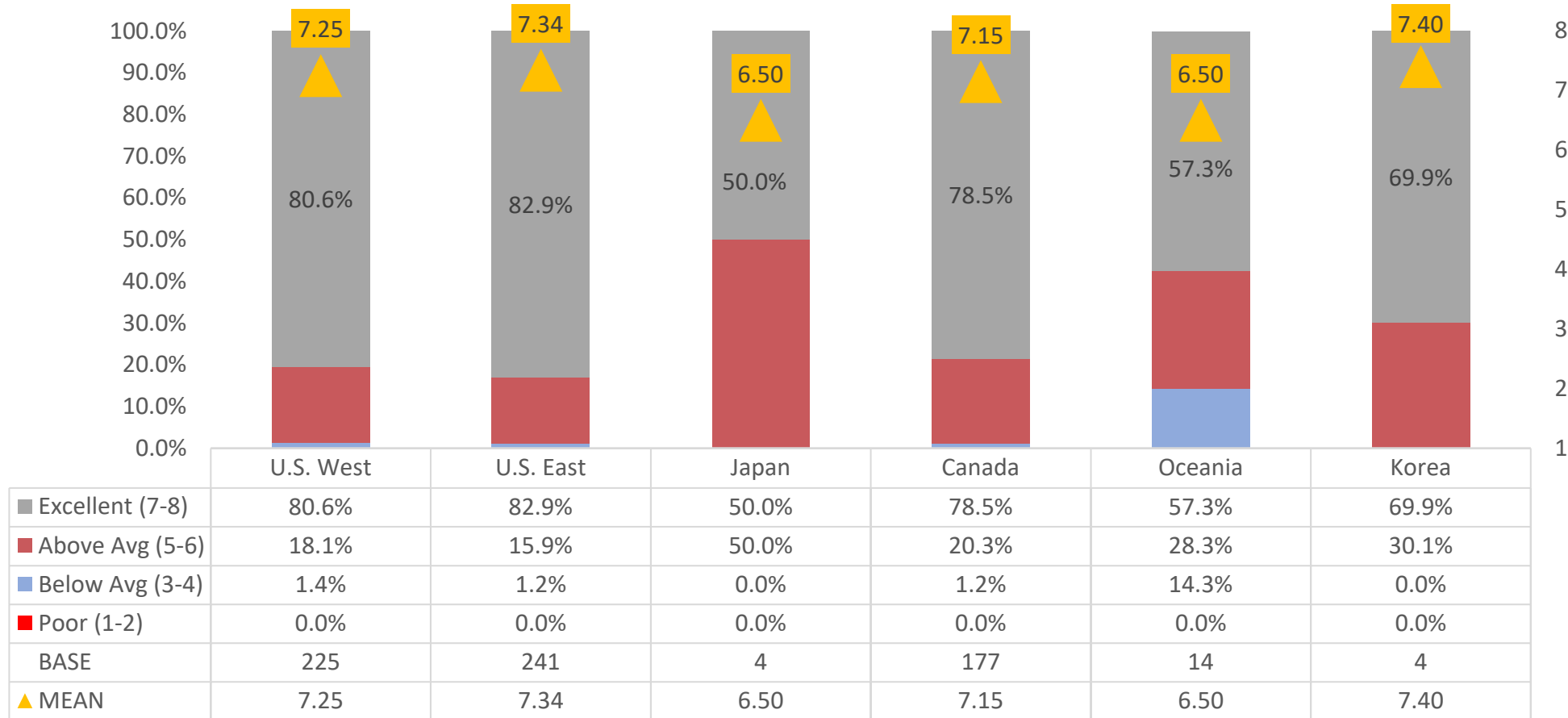
PUBLIC AREAS - KAUUA'I

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



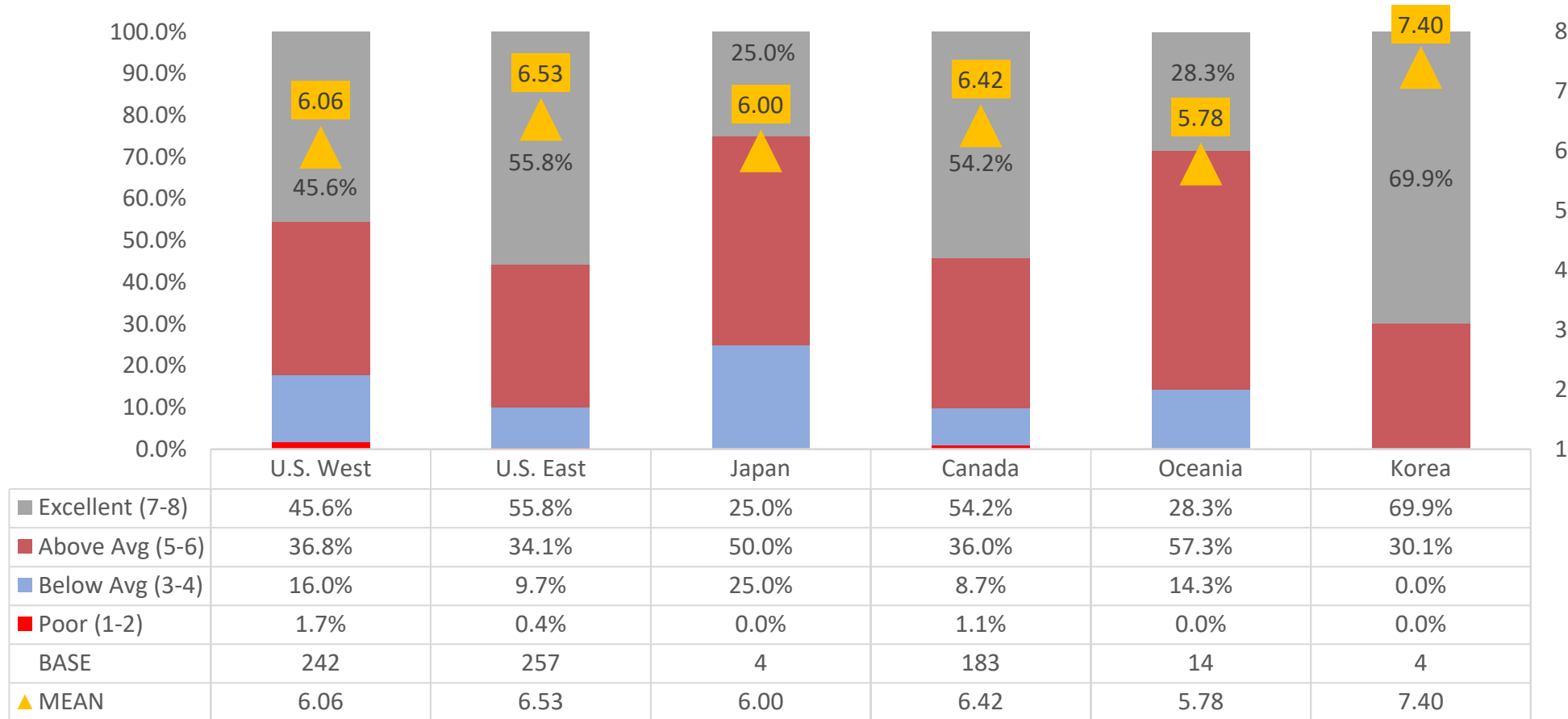
PARKS - KAUA'I

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



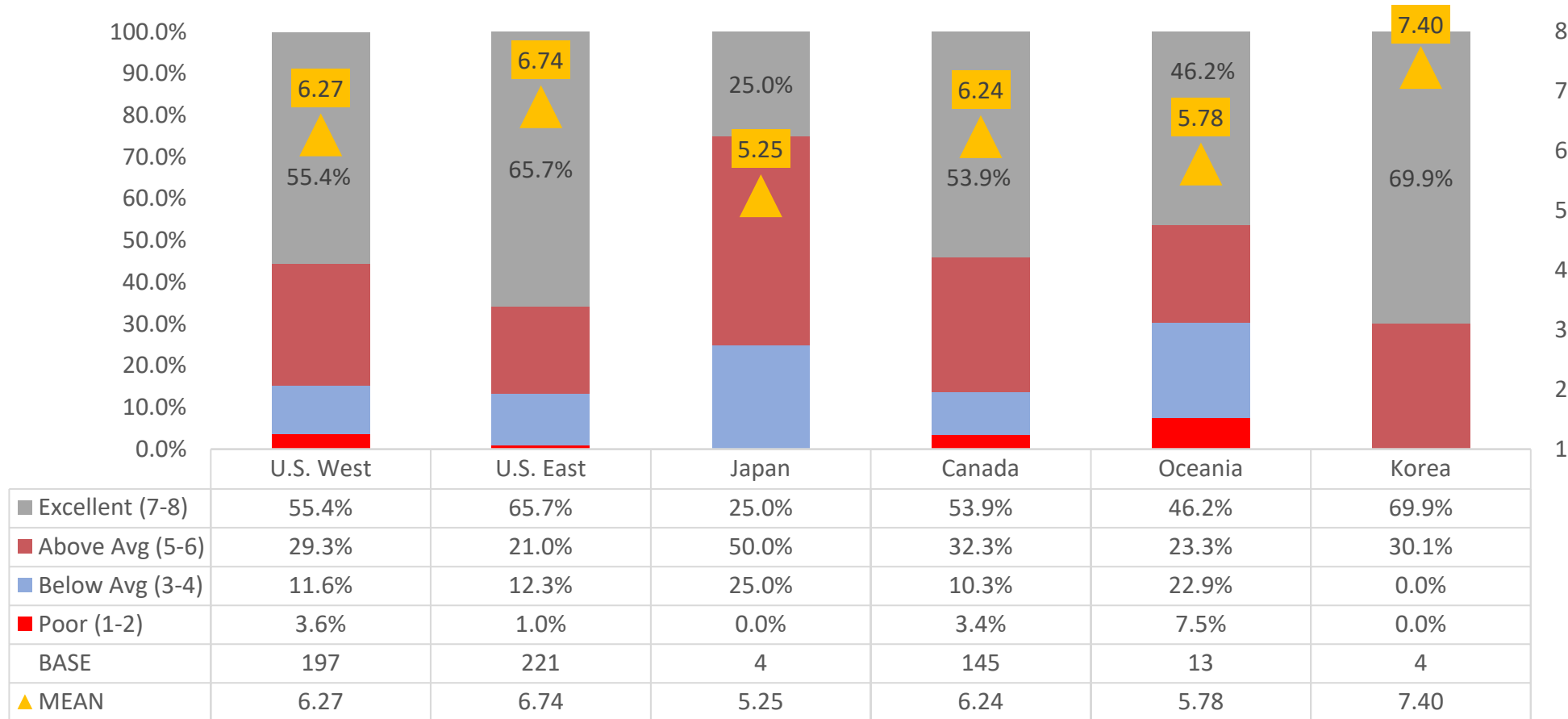
ROADS - KAUA'I

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



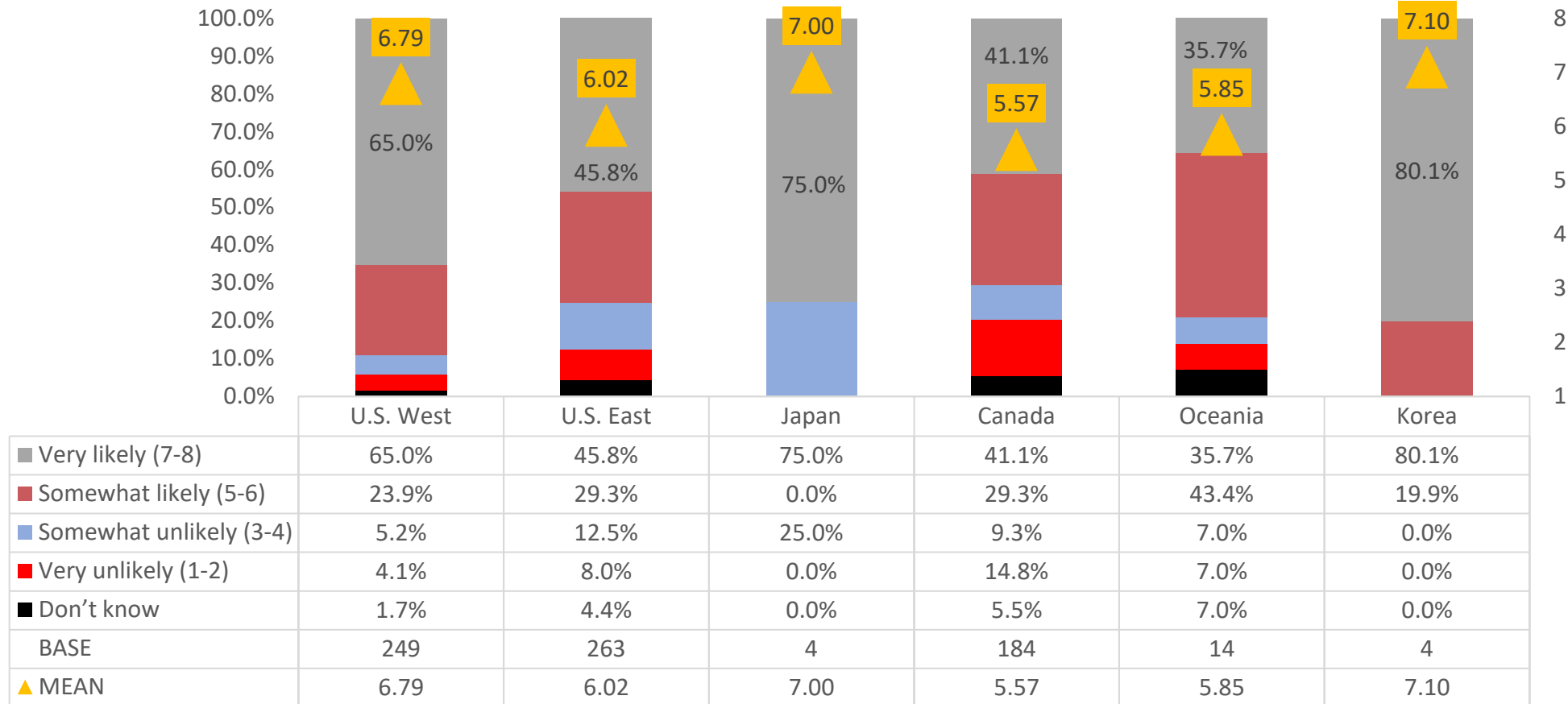
TRANSPORTATION ON ISLAND - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

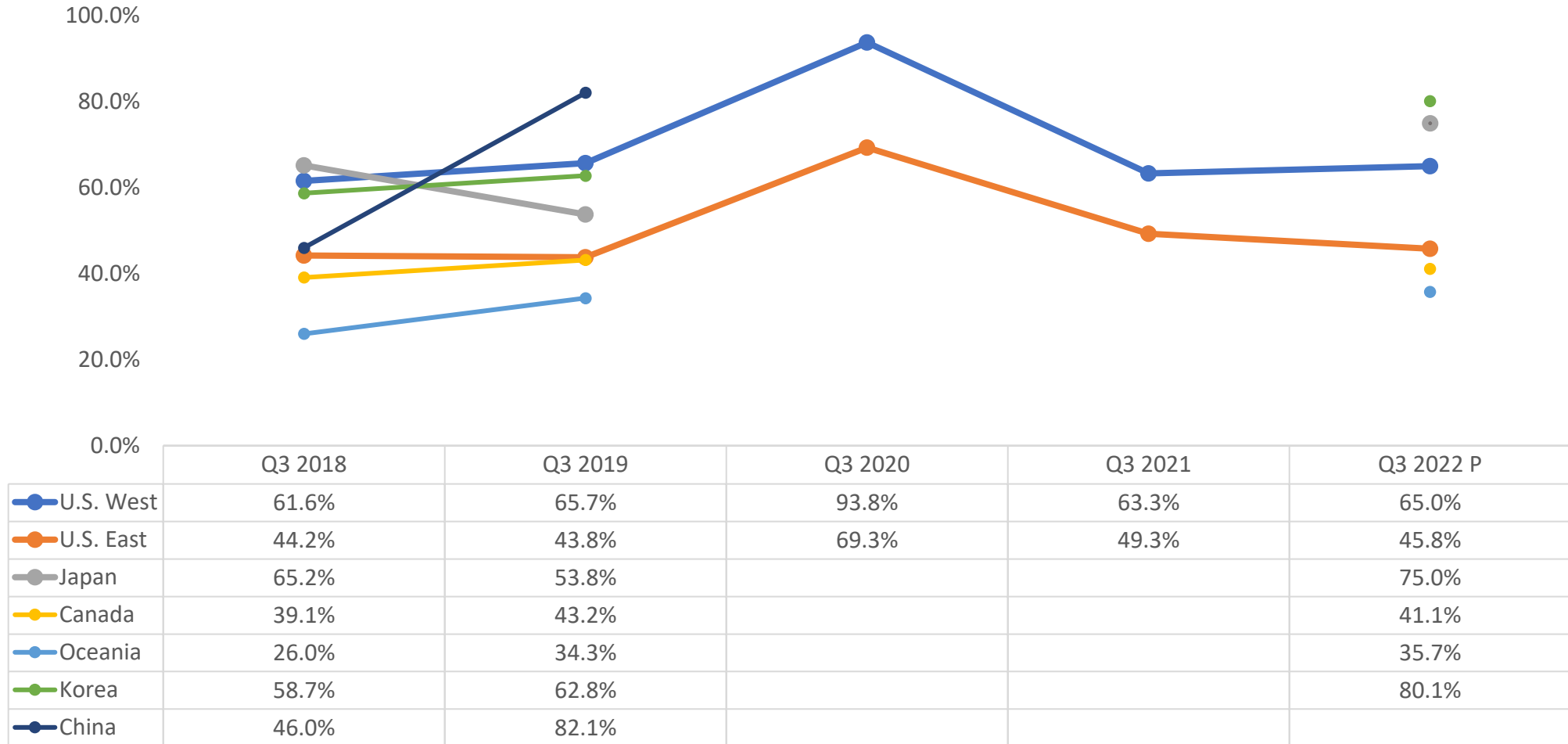
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



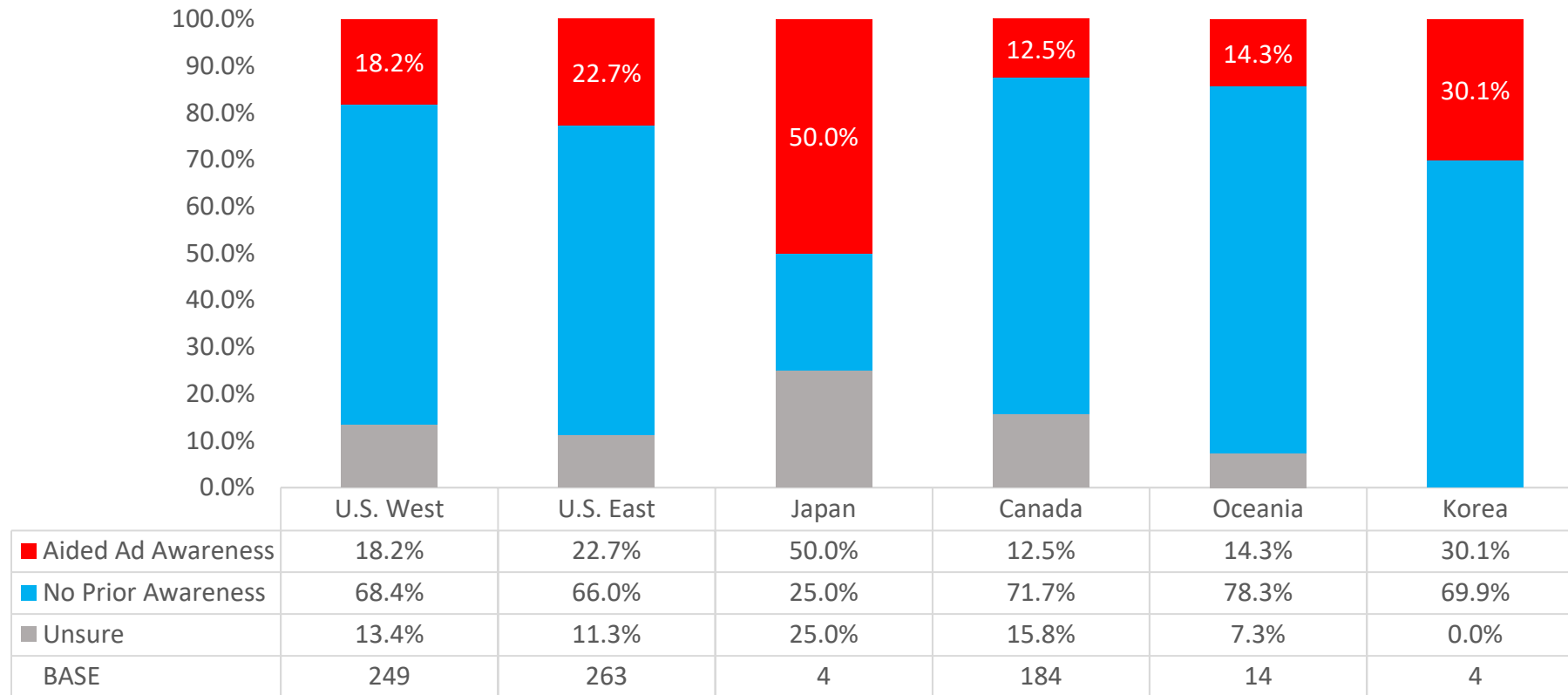
LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



AIDED ADVERTISING AWARENESS - KAUA'I



MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	42.4%	50.6%	50.0%	49.5%	43.0%	69.9%
Outdoor or sporting activities/ events	17.6%	14.5%	25.0%	16.9%	28.3%	0.0%
Hawaiian cultural events	6.2%	7.5%	0.0%	4.9%	0.0%	0.0%
Social media posts/ videos	10.5%	7.2%	0.0%	7.6%	14.7%	0.0%
Hawaiian music	4.5%	4.1%	25.0%	1.1%	0.0%	0.0%
Television programs or movies filmed in Hawai'i	4.4%	8.5%	25.0%	4.4%	7.3%	0.0%
BASE	249	263	4	184	14	4

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Fern Grotto	7.4%	6.7%	0.0%	7.7%	7.3%	0.0%
Hanalei Town	58.3%	45.0%	50.0%	64.0%	50.0%	0.0%
Hanalei Beach	58.4%	48.1%	50.0%	64.1%	57.7%	0.0%
Kalapaki Beach	19.0%	22.2%	25.0%	26.6%	14.3%	19.9%
Kalalau Trail	15.4%	14.4%	0.0%	24.0%	36.0%	0.0%
Bike Path in Kapaa	9.3%	4.3%	0.0%	8.1%	7.0%	0.0%
Kaua'i Museum	2.4%	4.2%	0.0%	4.9%	7.3%	0.0%
Ke'e Beach	11.0%	14.6%	25.0%	25.5%	14.3%	0.0%
Kilauea Lighthouse	27.2%	25.1%	0.0%	28.7%	21.7%	0.0%
Koke'e	9.5%	11.9%	0.0%	12.0%	7.3%	0.0%

ATTRACTIONS- KAUA'I

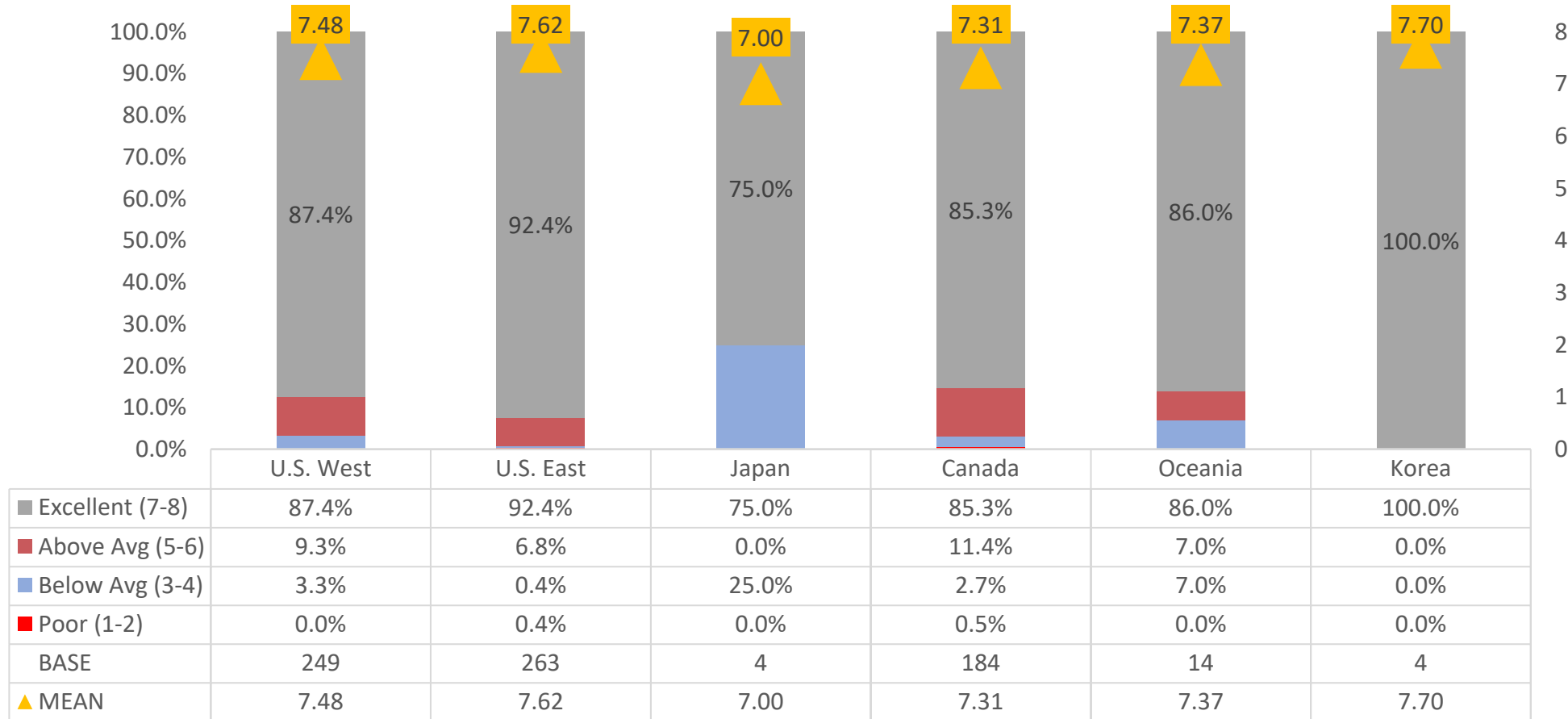
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Koke'e Museum	3.9%	6.1%	0.0%	3.3%	0.0%	0.0%
Na Aina Kai Gardens	2.4%	3.9%	0.0%	1.1%	7.3%	0.0%
Napali Coast	48.3%	55.4%	50.0%	54.5%	71.3%	0.0%
Allerton Garden	5.9%	5.2%	50.0%	4.9%	14.3%	0.0%
Limahuli Garden	5.9%	4.6%	0.0%	6.0%	0.0%	0.0%
Old Koloa Town	38.2%	32.6%	50.0%	40.1%	35.7%	0.0%
Opaeka'a Falls	11.4%	17.3%	25.0%	16.9%	14.3%	19.9%
Po'ipu Beach	60.8%	55.1%	50.0%	68.4%	71.7%	0.0%
Smith's Tropical Paradise Gardens	6.6%	6.7%	0.0%	9.8%	0.0%	0.0%
Spouting Horn	31.3%	30.9%	0.0%	30.3%	29.0%	0.0%
Wailua Falls	30.1%	41.8%	25.0%	50.0%	50.7%	0.0%

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Wailua River	23.6%	21.0%	50.0%	24.5%	14.3%	0.0%
Waimea Canyon	46.9%	56.7%	25.0%	71.1%	64.7%	30.1%
Disc Golf	1.3%	1.2%	0.0%	0.0%	0.0%	0.0%
Mini Golf	4.0%	2.0%	0.0%	6.0%	0.0%	0.0%

FRIENDLINESS OF KAUA'I RESIDENTS

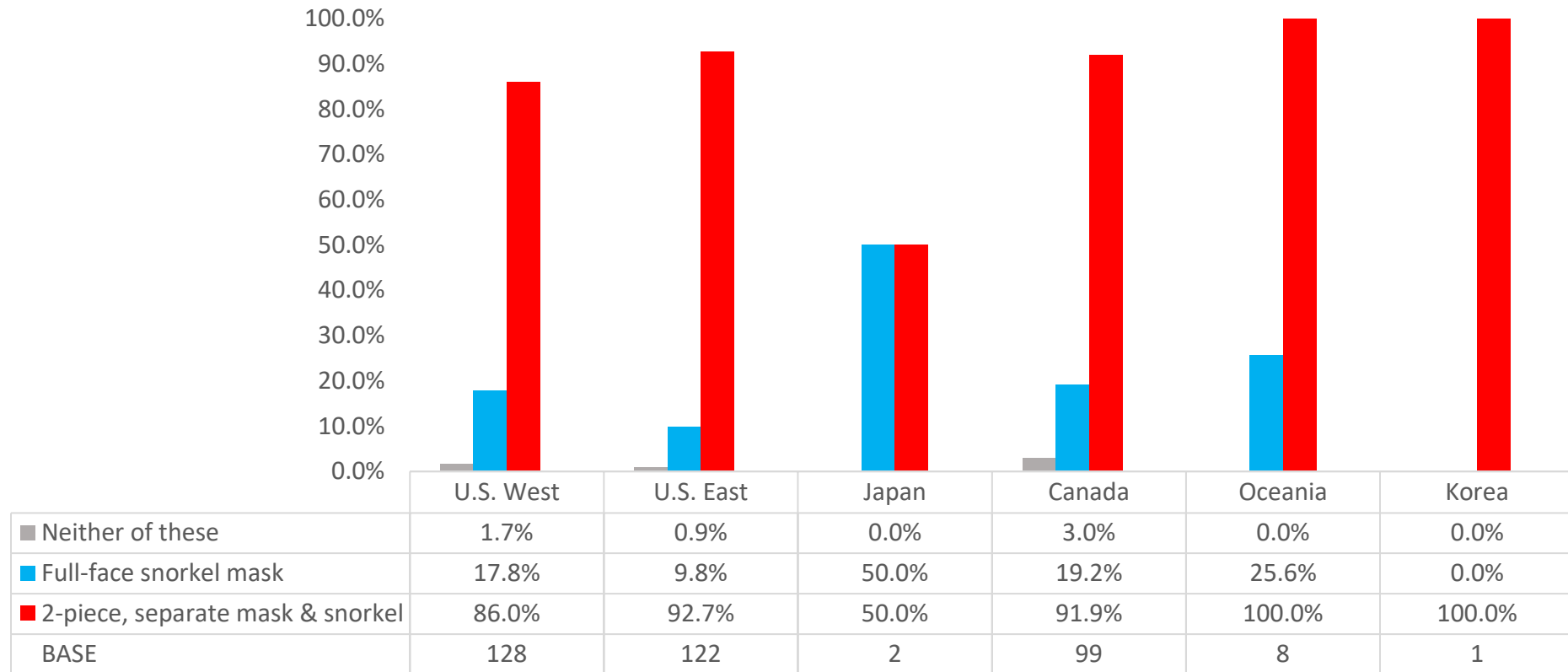
8-pt Rating Scale
8=Excellent/ 1=Poor



TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Been here before	41.6%	26.8%	25.0%	30.1%	35.0%	30.1%
Friend recommendation	28.3%	35.3%	0.0%	38.8%	21.7%	30.1%
Visiting Family/ Friends	5.5%	3.8%	25.0%	3.2%	0.0%	0.0%
Cruise line stop/part of tour	1.6%	9.0%	25.0%	3.3%	0.0%	0.0%
Social Media Post	4.1%	2.6%	0.0%	4.4%	14.3%	19.9%
Location/ Never been, but went to other islands	3.5%	3.1%	0.0%	2.1%	0.0%	0.0%
Own a timeshare	3.1%	2.7%	0.0%	2.2%	0.0%	0.0%
Nature/ Beauty/ Scenery	1.7%	1.8%	25.0%	1.1%	7.0%	0.0%
Attending Conference/ Event	1.6%	1.5%	0.0%	1.6%	14.7%	0.0%
Travel Agent	1.2%	2.5%	0.0%	2.2%	0.0%	19.9%

SNORKELING EQUIPMENT USED - KAUA'I



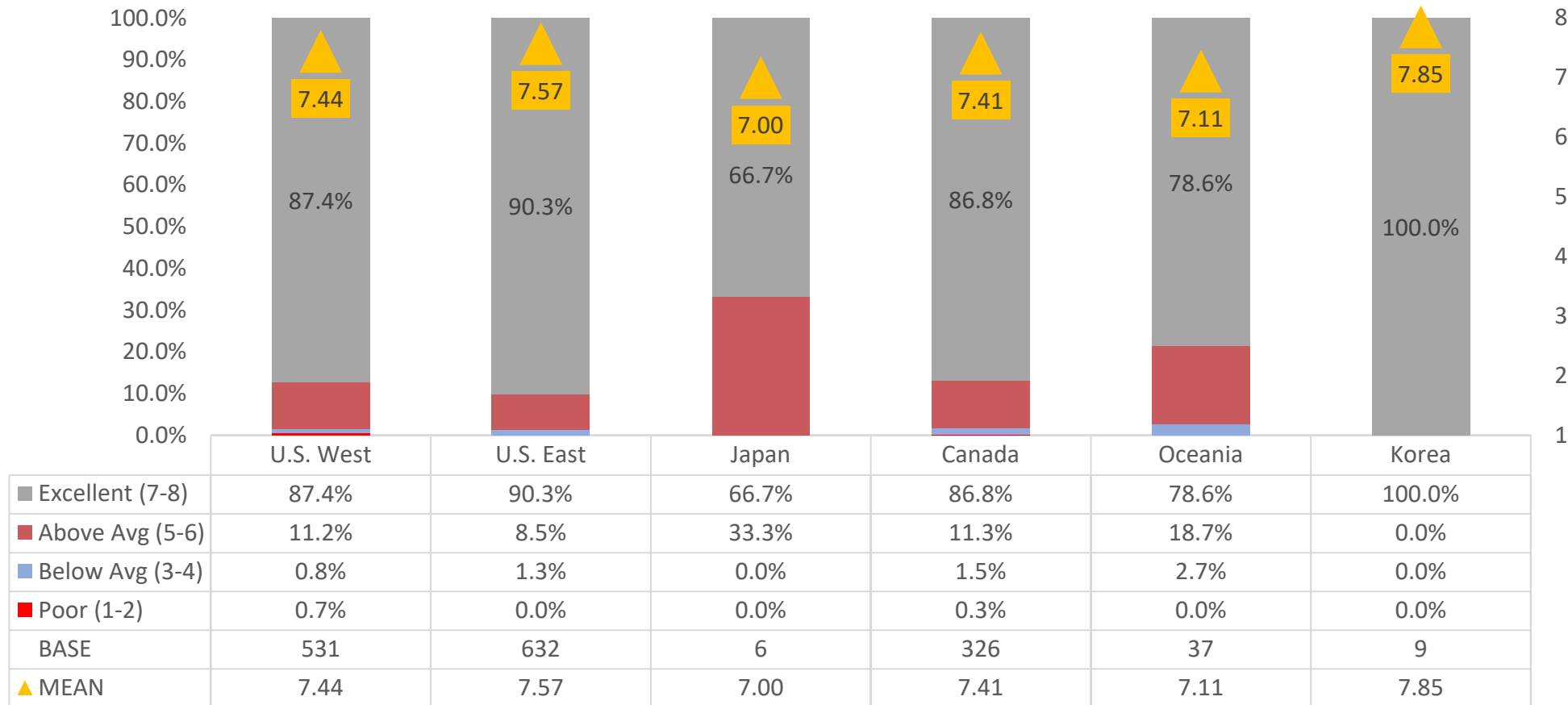
SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	96.2%	100.0%	100.0%	100.0%	100.0%	0.0%
Yes, needed assistance using 2 piece mask & snorkel	3.8%	0.0%	0.0%	0.0%	0.0%	100.0%
Yes, while snorkeling using a full face snorkel mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	126	121	2	96	8	1

Section 7 – MAUI

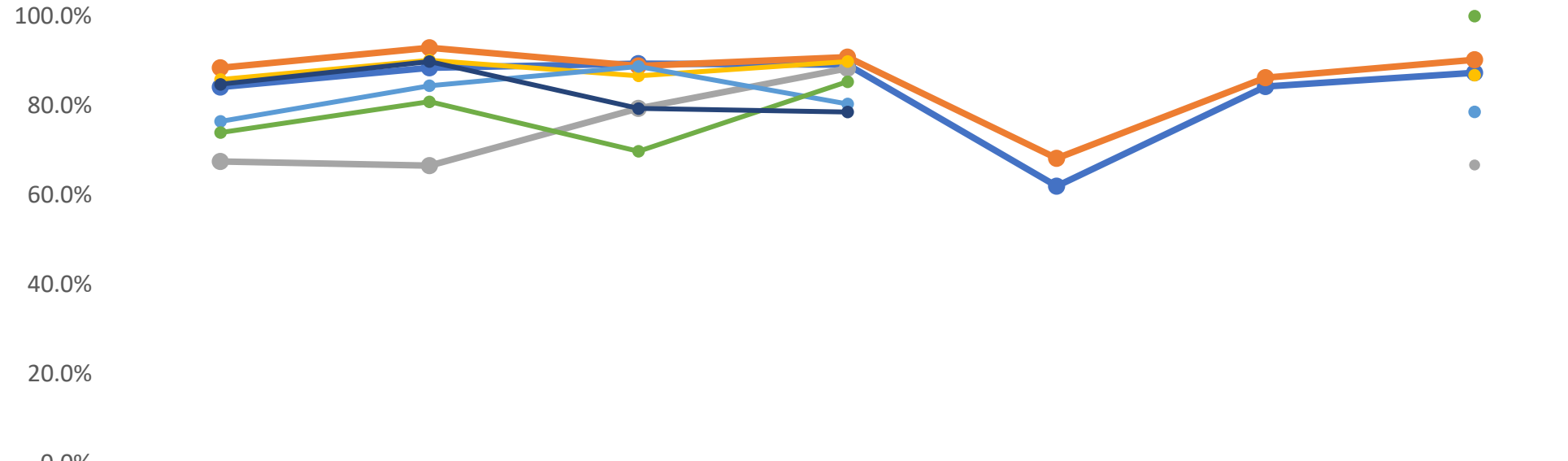
SATISFACTION - MAUI

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



SATISFACTION - MAUI

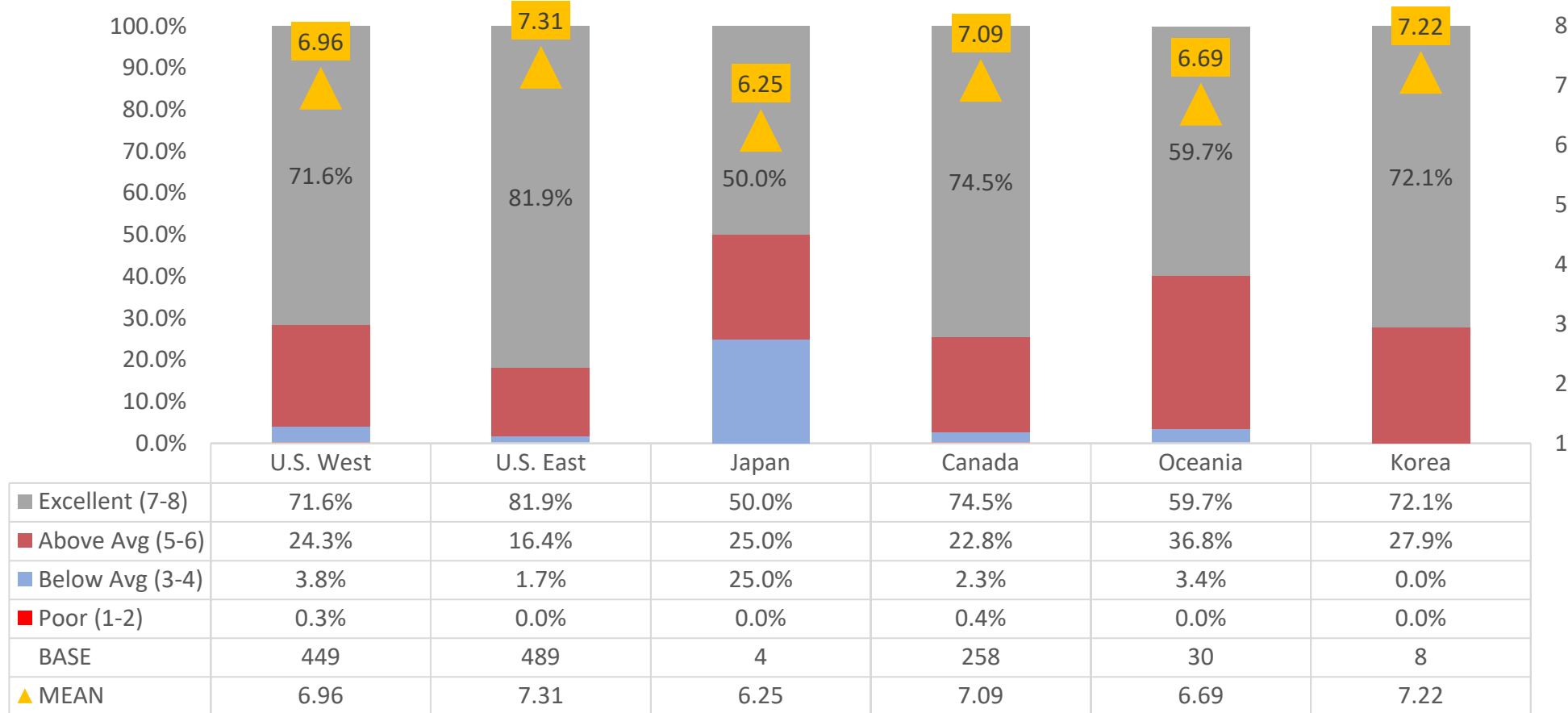
Tracking Data – Rating of “Excellent” (7-8)



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022 P
U.S. West	84.2%	88.5%	89.4%	89.2%	62.0%	84.3%	87.4%
U.S. East	88.5%	93.0%	88.9%	90.9%	68.2%	86.3%	90.3%
Japan	67.5%	66.6%	79.4%	88.4%			66.7%
Canada	85.9%	90.2%	86.7%	89.9%			86.8%
Oceania	76.5%	84.5%	88.8%	80.4%			78.6%
Korea	74.0%	80.9%	69.8%	85.4%			100.0%
China	84.8%	89.9%	79.4%	78.6%			

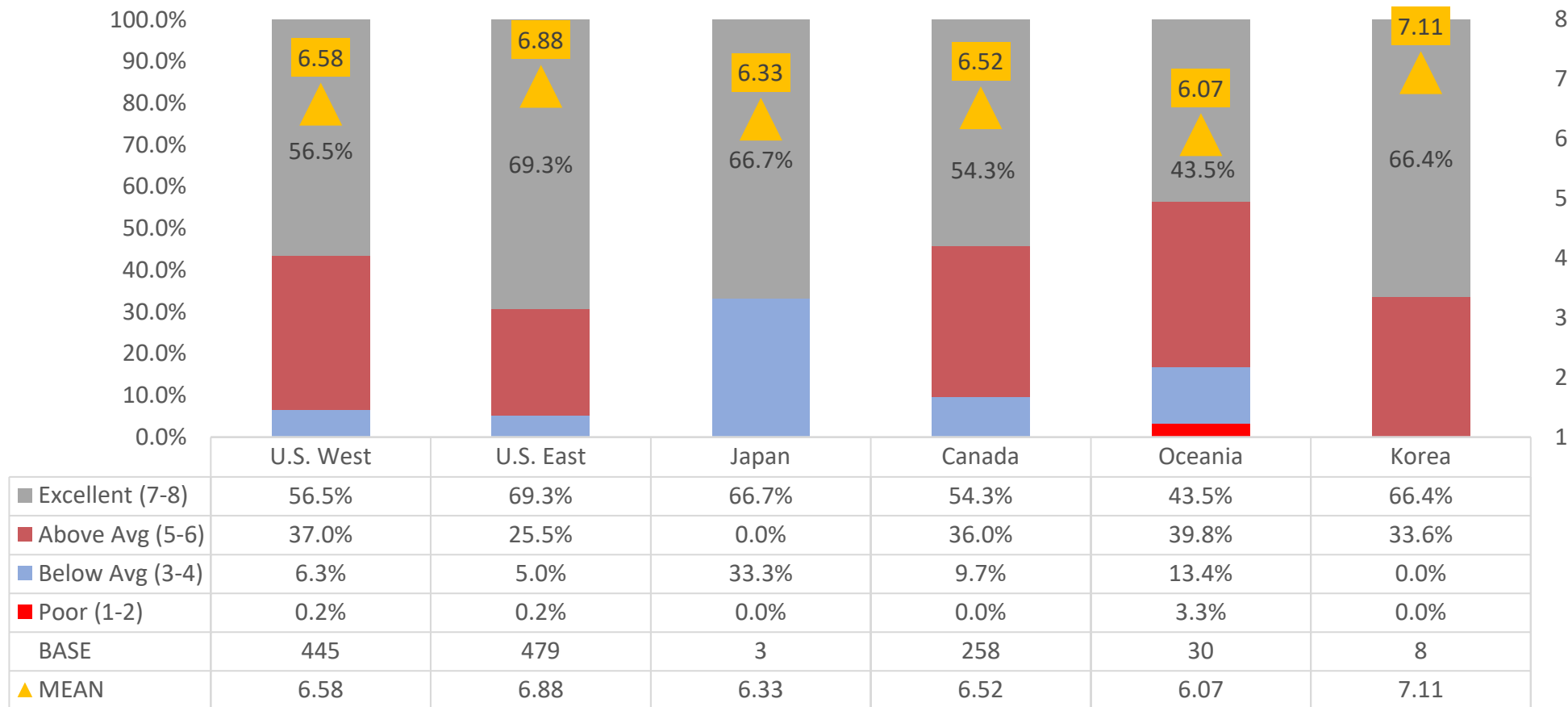
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



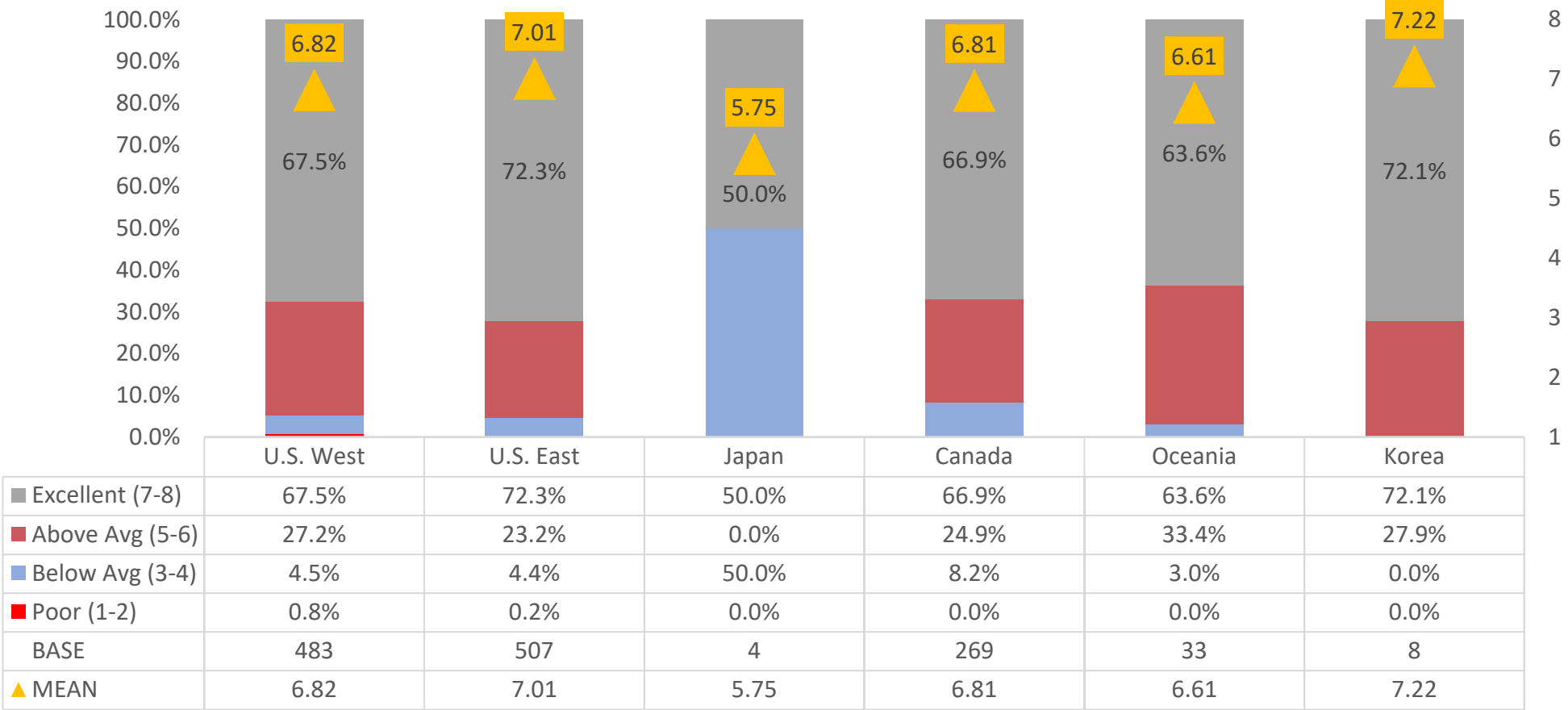
SHOPPING - MAUI

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



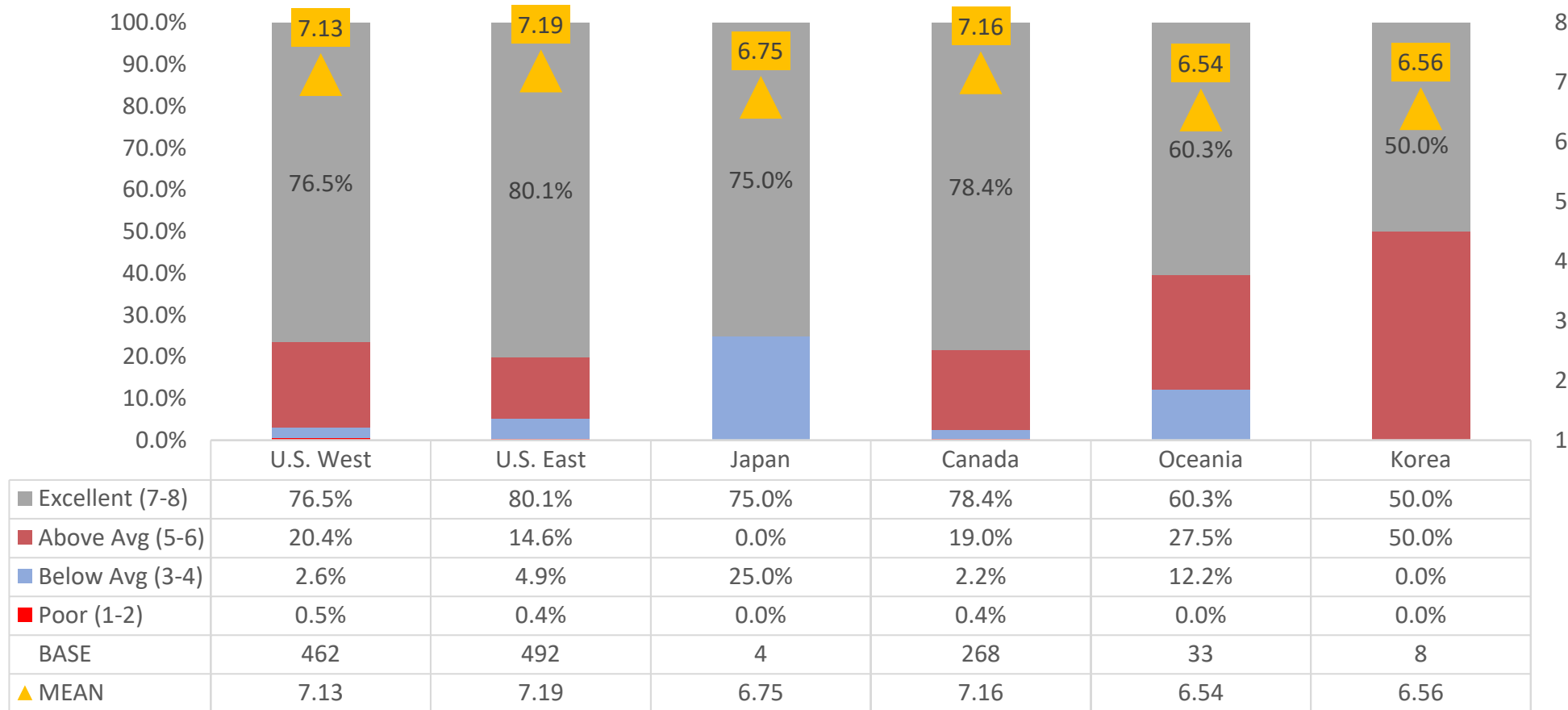
DINING/ FOOD & BEVERAGE - MAUI

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



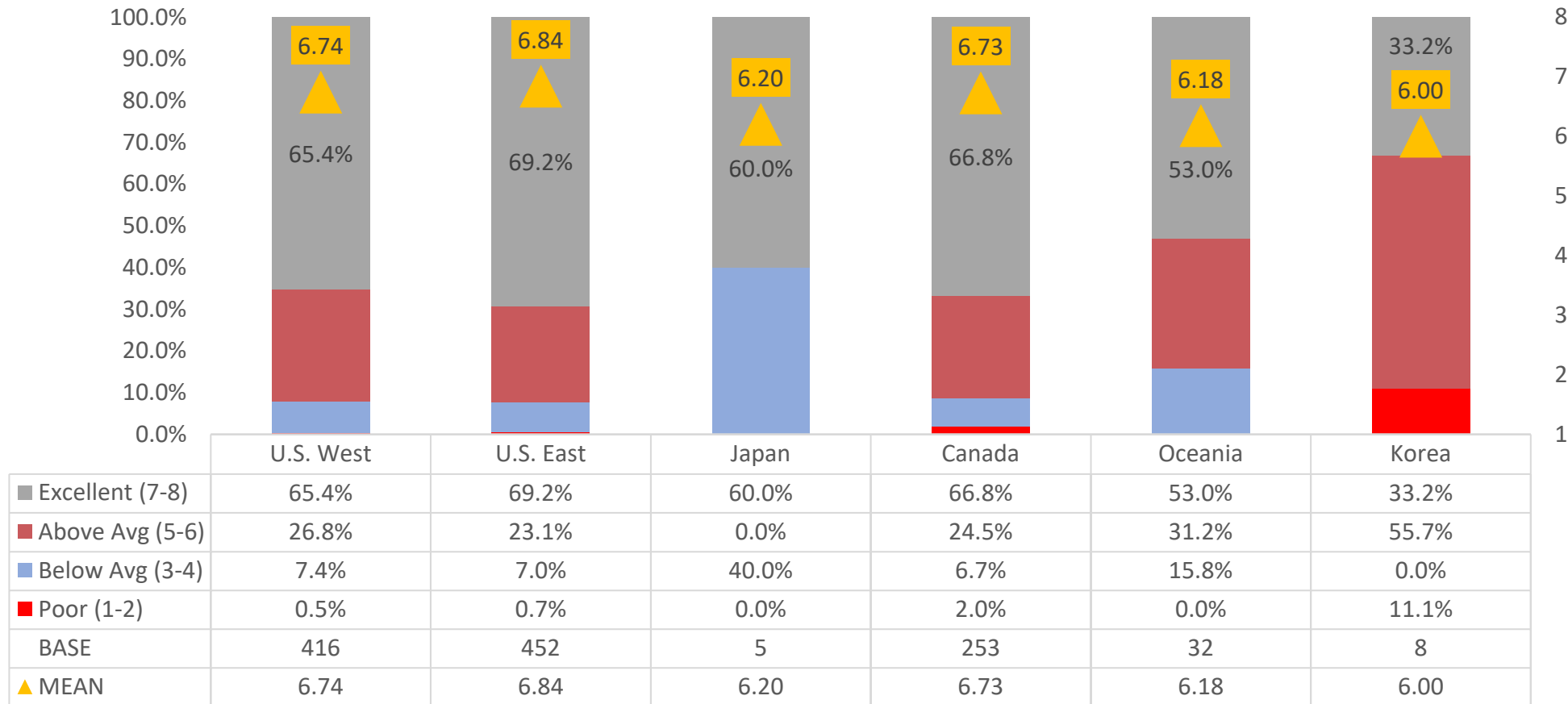
LODGING/ ACCOMMODATIONS - MAUI

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



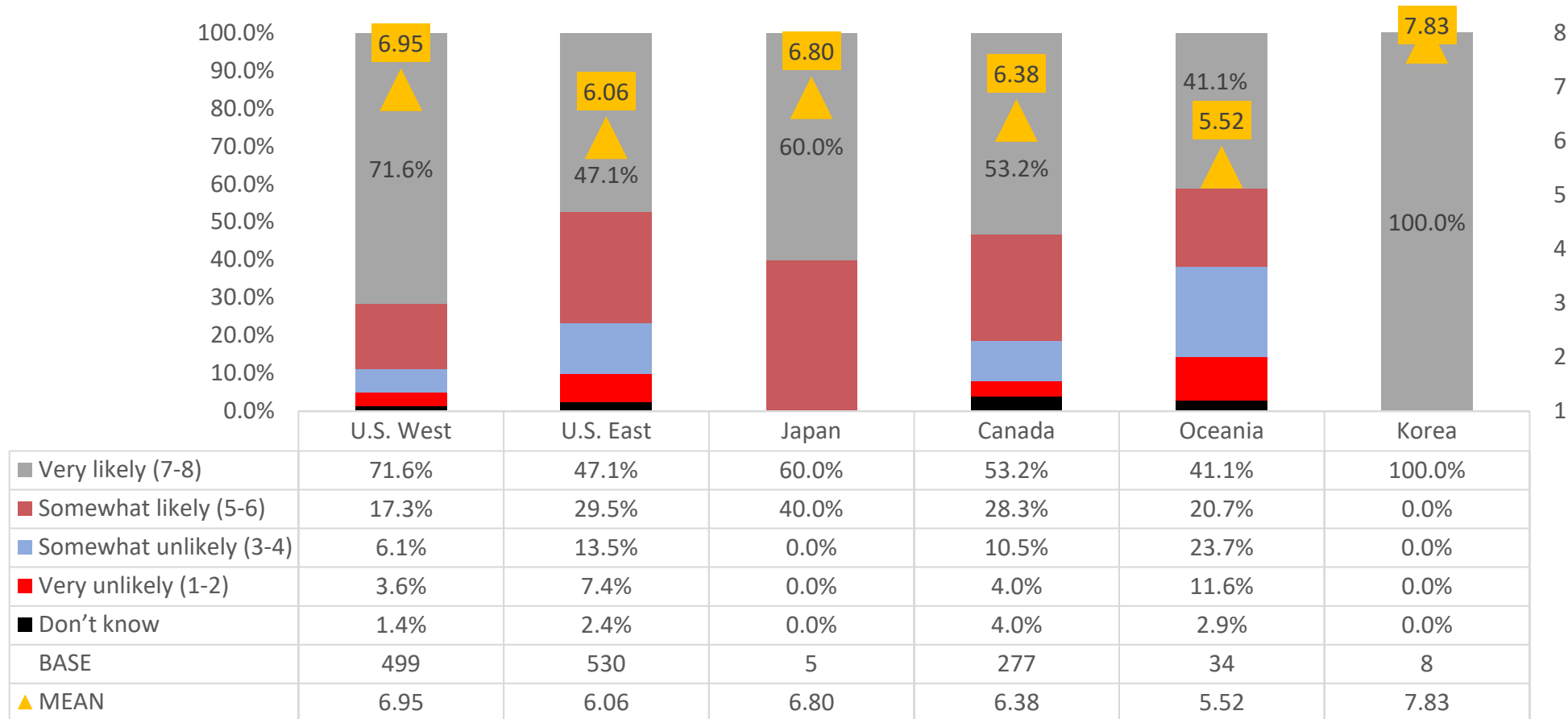
TRANSPORTATION ON ISLAND - MAUI

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



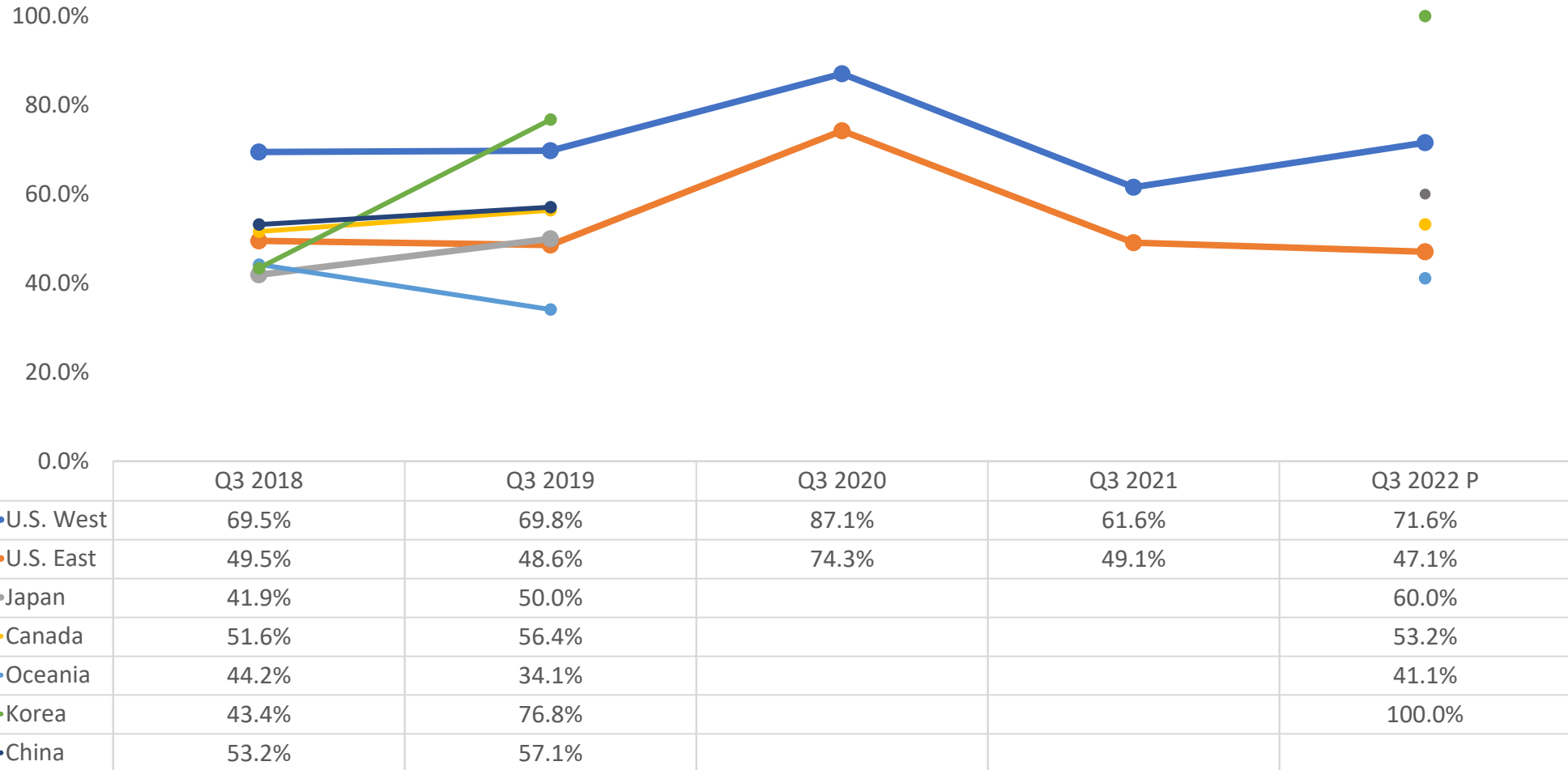
LIKELIHOOD OF RETURN VISIT - MAUI

8-pt Rating Scale
8=Very likely/ 1=Very unlikely

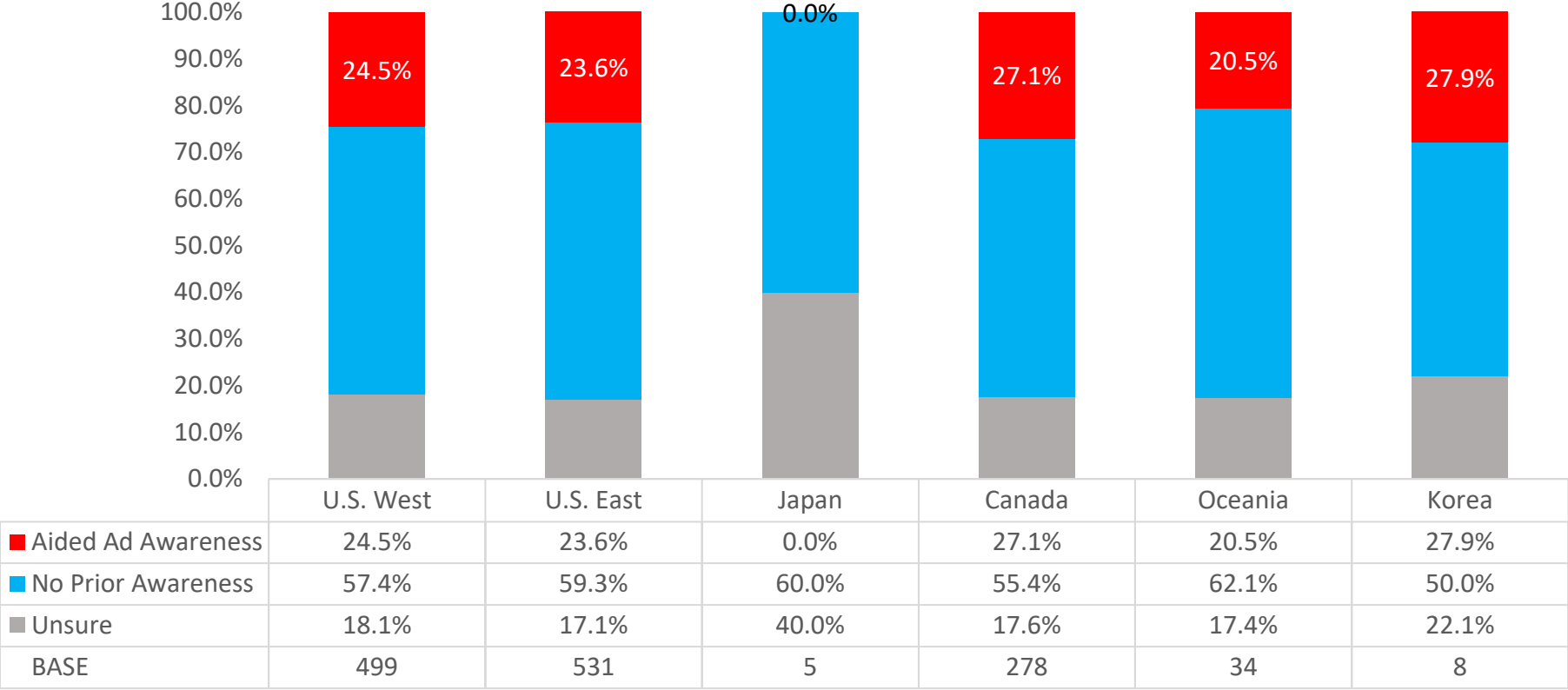


LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



AIDED ADVERTISING AWARENESS - MAUI



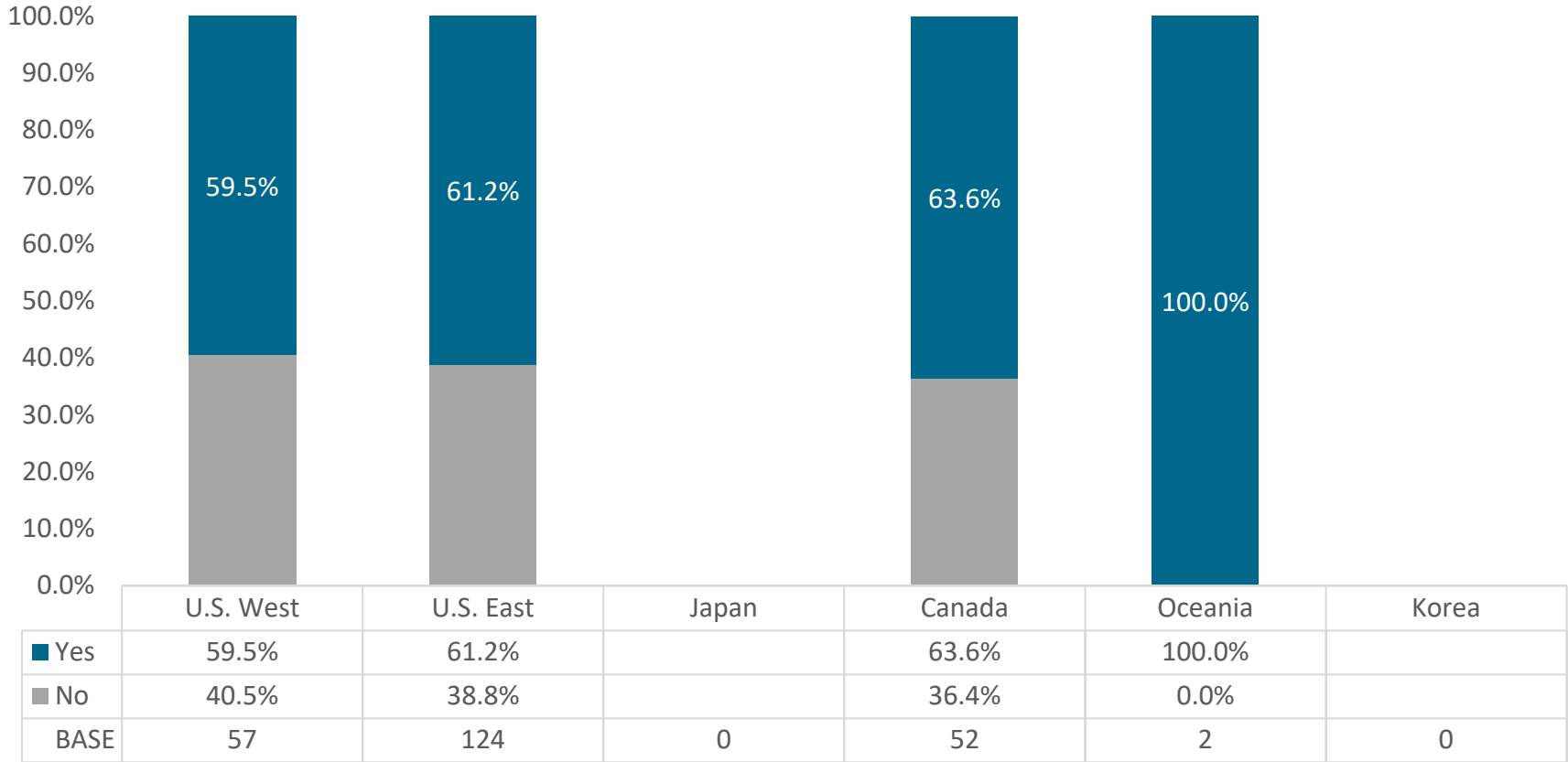
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	33.3%	43.4%	60.0%	51.5%	29.8%	27.9%
Outdoor or sporting activities/ events	19.5%	16.2%	0.0%	22.6%	11.6%	0.0%
Hawaiian cultural events	8.9%	9.3%	20.0%	13.0%	14.8%	0.0%
Social media posts/ videos	9.8%	15.1%	20.0%	23.1%	14.8%	11.1%
Hawaiian music	7.5%	5.7%	20.0%	7.9%	5.8%	0.0%
Television programs or movies filmed in Hawai'i	5.7%	7.0%	0.0%	13.3%	11.6%	0.0%
BASE	499	531	5	278	34	8

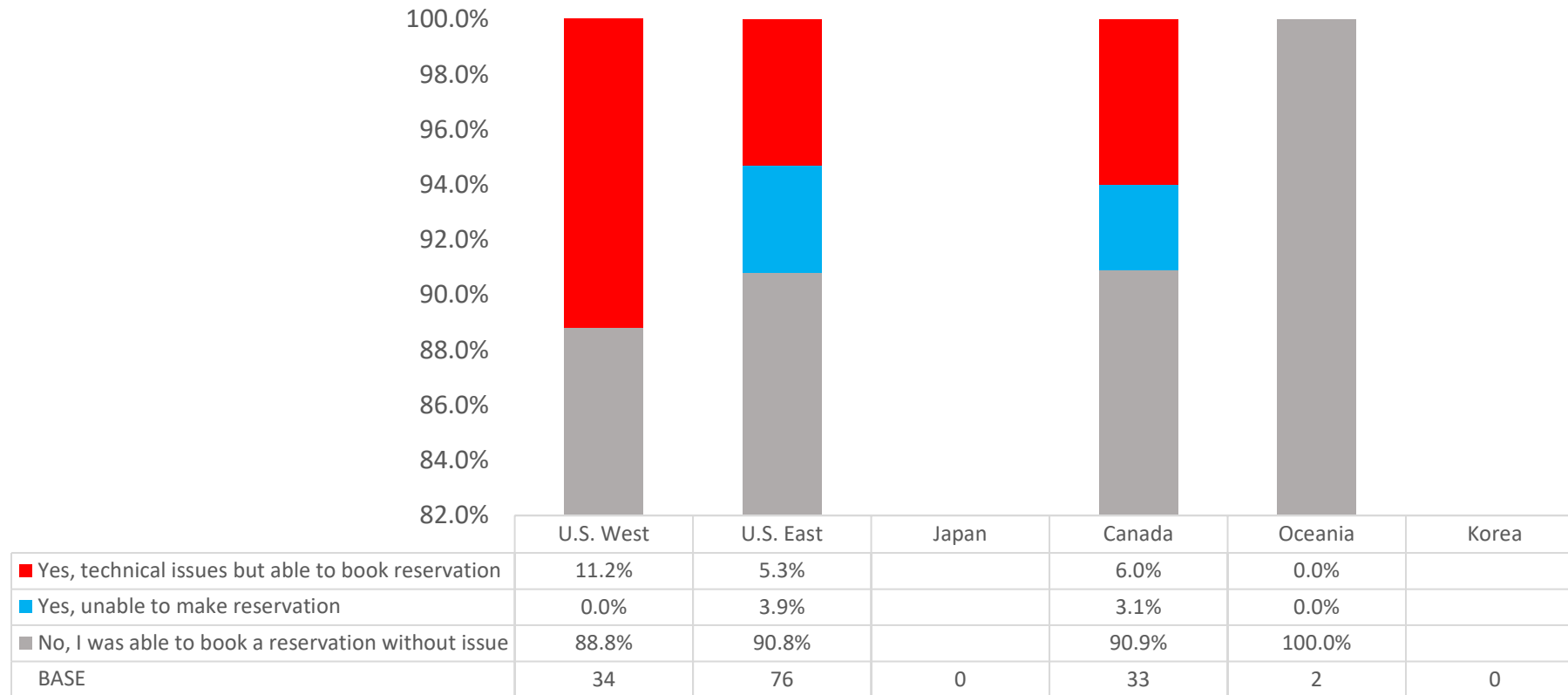
ATTRACTIONS- MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Alexander & Baldwin Sugar Museum	1.8%	1.8%	0.0%	1.5%	0.0%	11.1%
Aquarium Maui /Maui Ocean Center	14.7%	13.7%	0.0%	20.5%	5.9%	11.1%
Baldwin Missionary Home Museum	2.8%	3.0%	0.0%	3.6%	0.0%	11.1%
Hale Pa'i Printing House	0.4%	0.0%	0.0%	0.0%	2.9%	0.0%
Haleakala National Park	27.0%	50.4%	40.0%	50.0%	38.2%	38.9%
Haleki'i Pihana Heiau State Monument	1.4%	2.7%	0.0%	0.4%	2.9%	0.0%
Hana Cultural Center	7.1%	11.8%	0.0%	11.5%	3.0%	0.0%
'Iao Valley State Monument	9.3%	6.3%	20.0%	7.2%	8.7%	0.0%
Kepaniwai Park & Heritage Gardens	3.5%	4.2%	0.0%	6.1%	0.0%	0.0%
Kula Botanical Garden	6.6%	7.7%	20.0%	5.1%	2.9%	0.0%
Maui Historical Society Bailey House Museum	1.6%	0.8%	0.0%	1.4%	2.9%	0.0%
Wainapanapa State Park	11.7%	23.2%	0.0%	18.8%	5.9%	0.0%
Whaler's Village Museum	14.8%	16.6%	20.0%	15.5%	11.6%	11.1%
Wo Hing Temple Museum	0.6%	1.0%	0.0%	2.5%	2.9%	0.0%

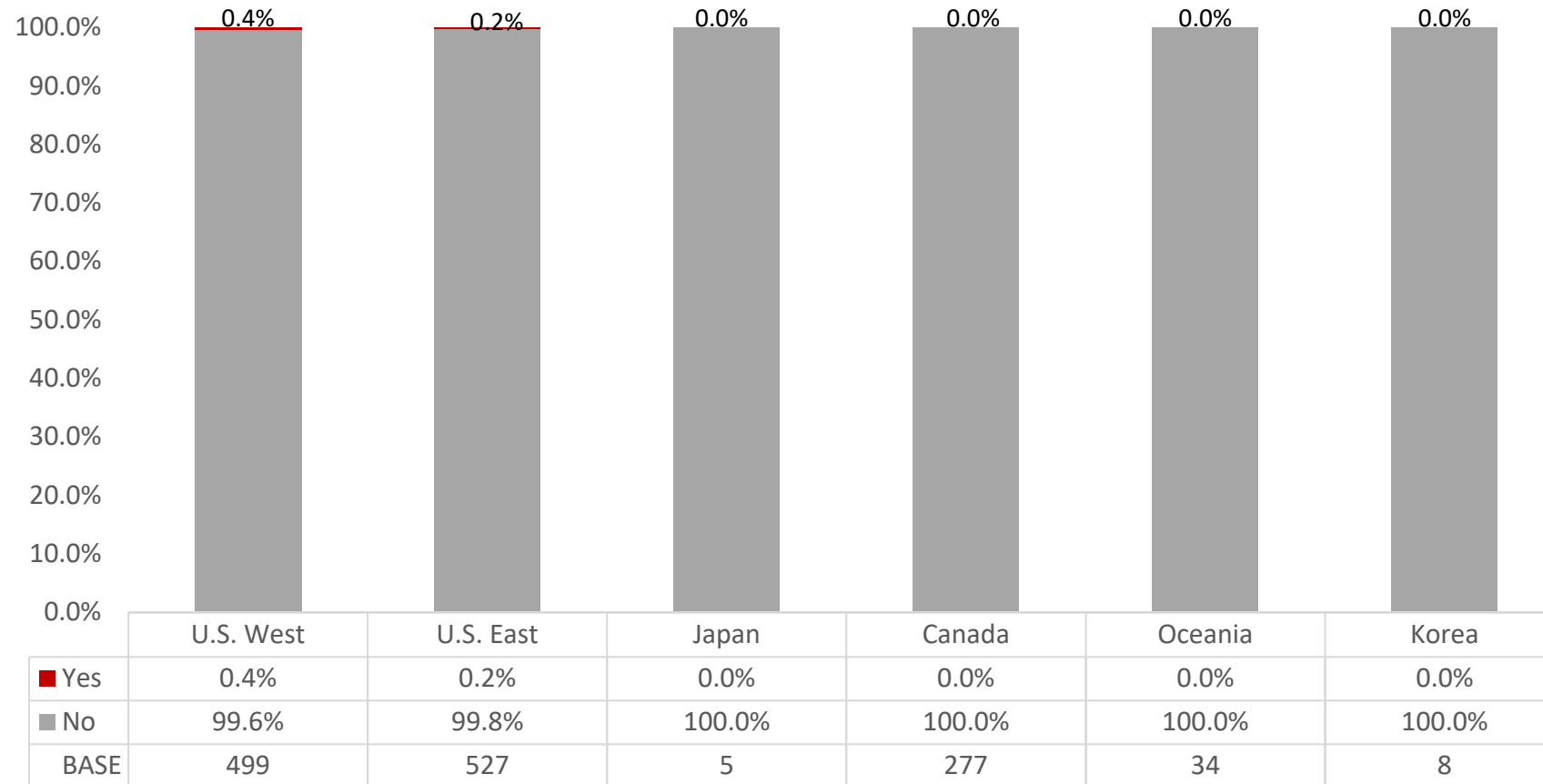
WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



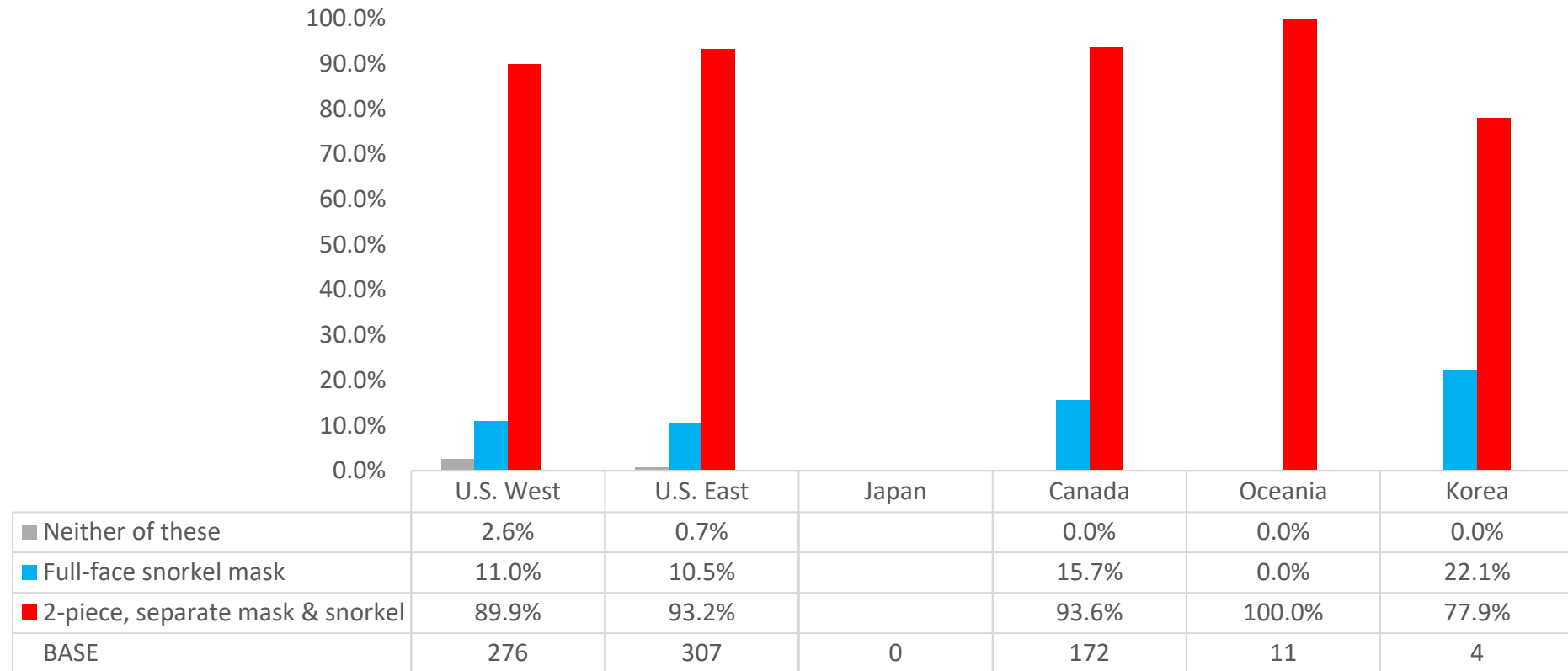
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Other	50.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Other sporting event	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	2	1	0	0	0	0

SNORKELING EQUIPMENT USED - MAUI



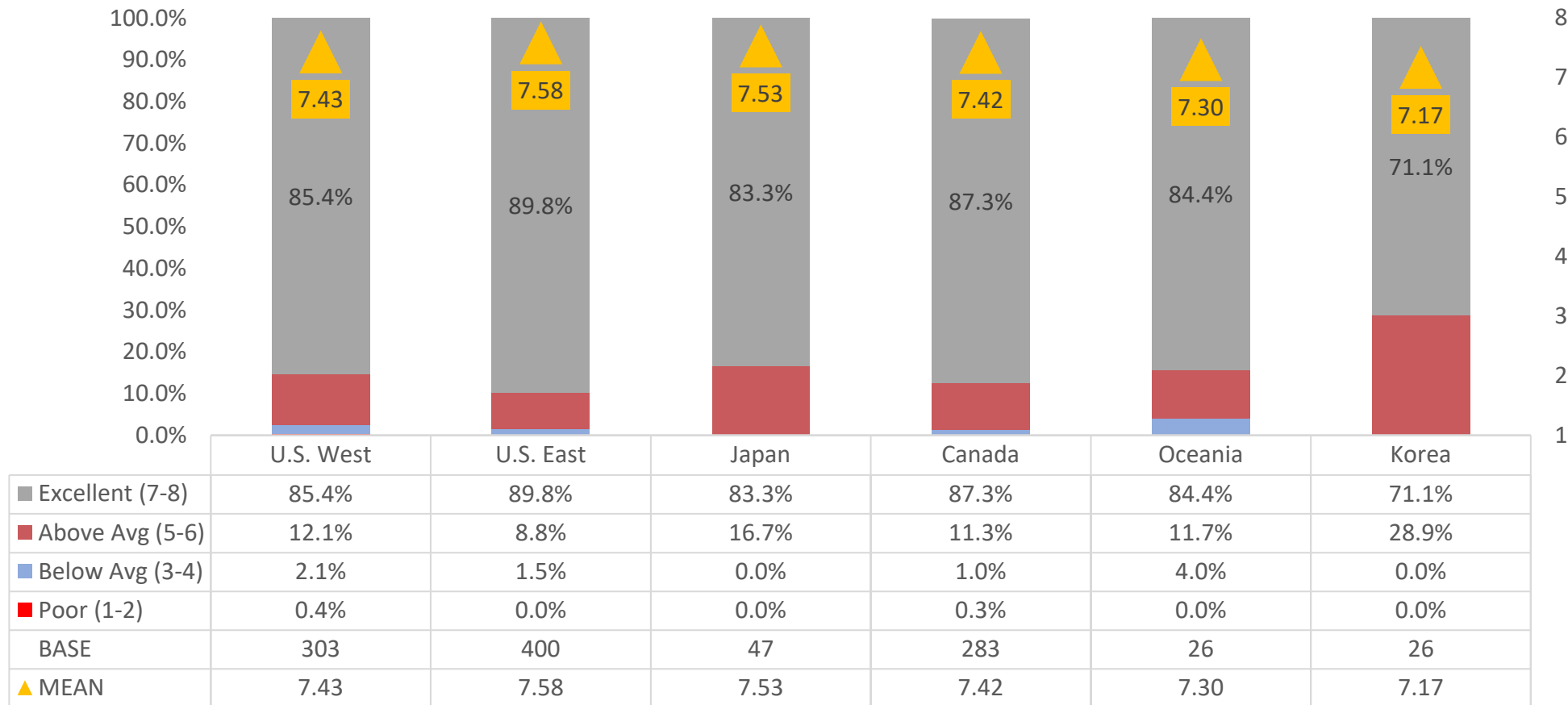
SNORKELING OCEAN SAFETY- MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	97.8%	99.3%		97.7%	100.0%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	2.2%	0.7%		1.8%	0.0%	0.0%
Yes, while snorkeling using a full face snorkel mask	0.0%	0.0%		0.6%	0.0%	0.0%
BASE	269	305	0	172	11	4

Section 8 – ISLAND OF HAWAII

SATISFACTION - ISLAND OF HAWAI'I

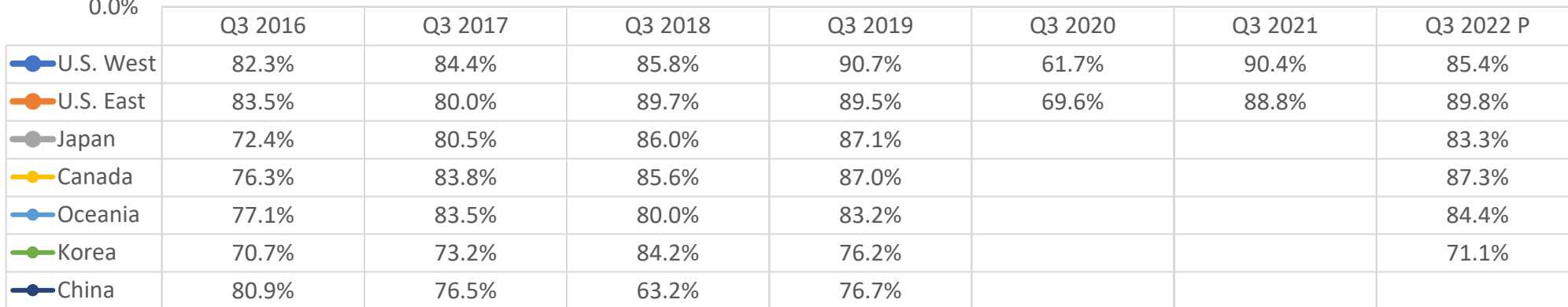
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION - ISLAND OF HAWAI'I

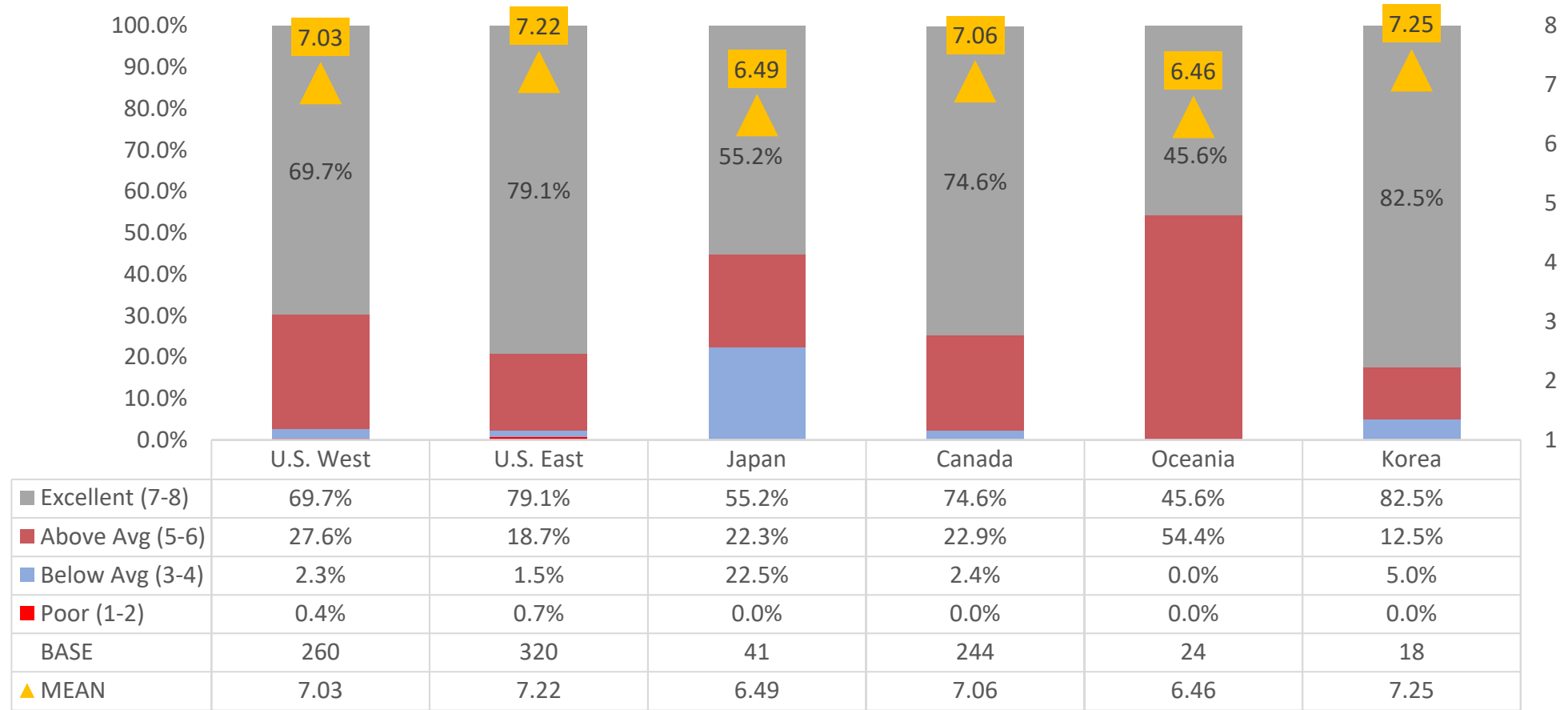
Tracking Data – Rating of “Excellent” (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



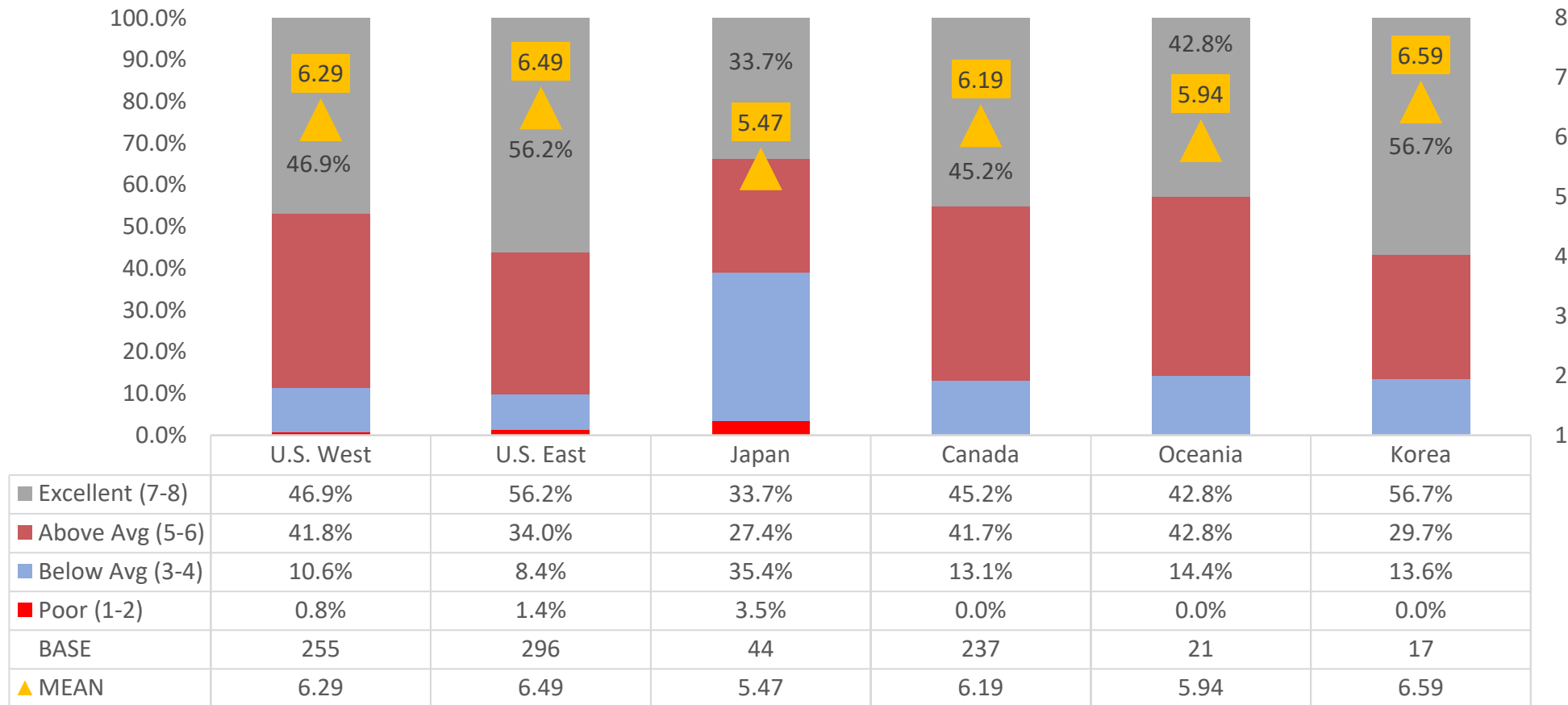
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



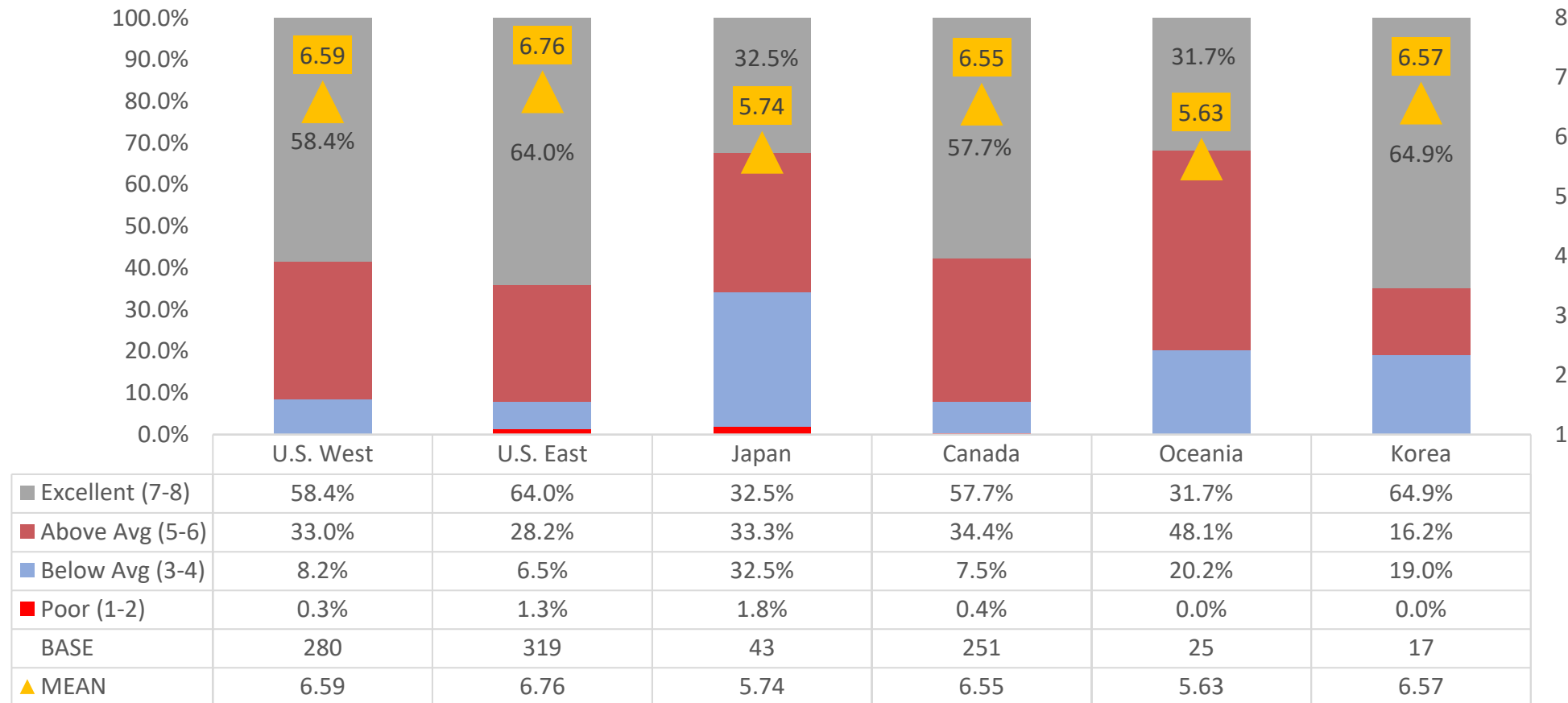
SHOPPING - ISLAND OF HAWAI'I

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



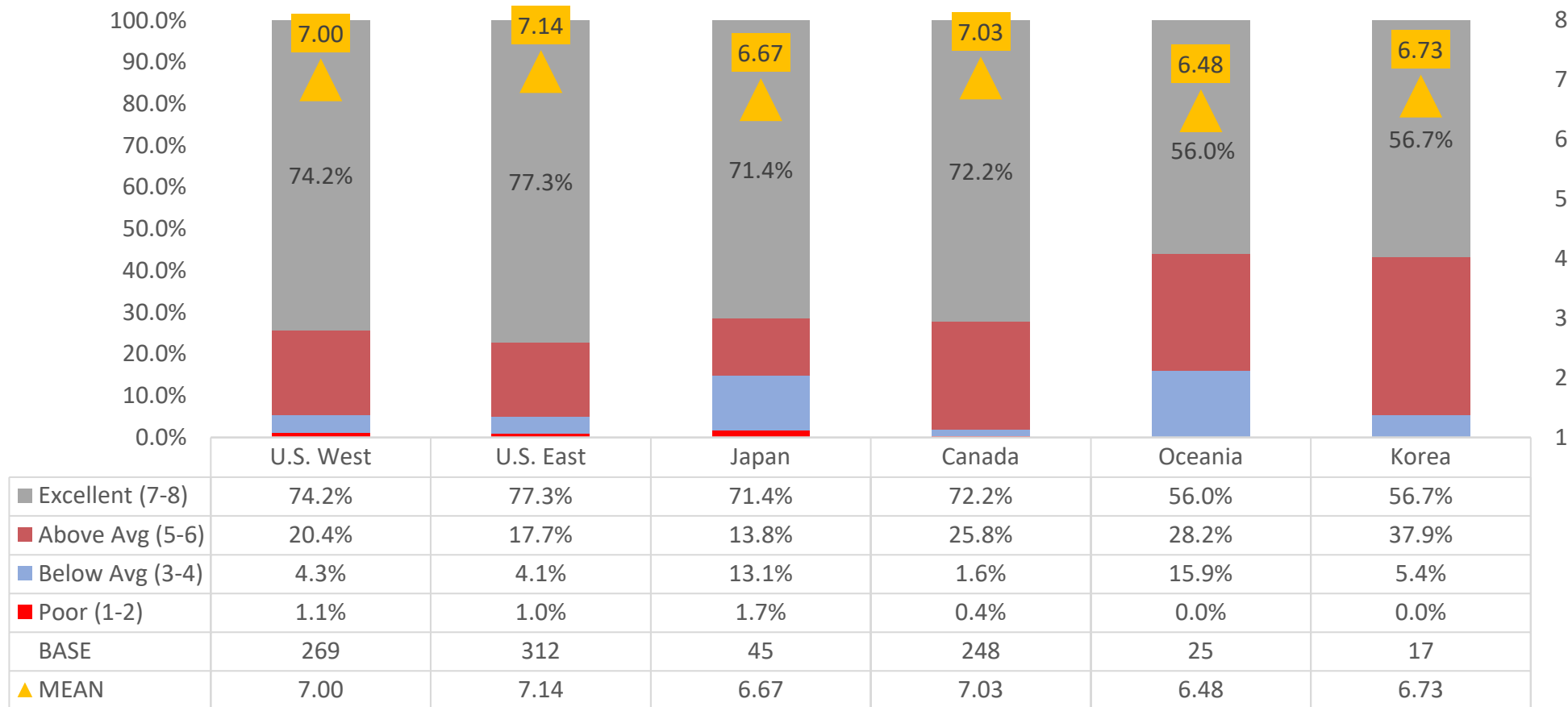
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



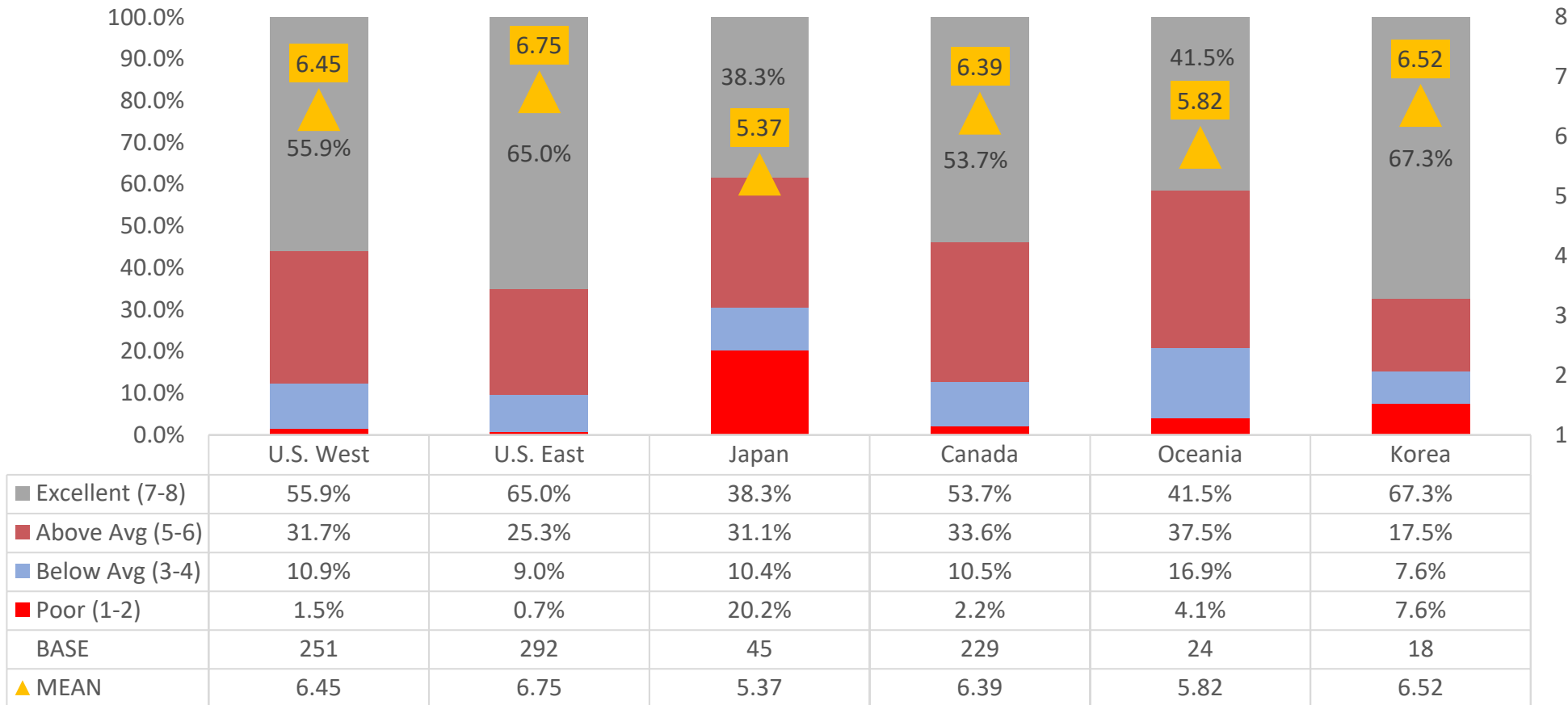
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



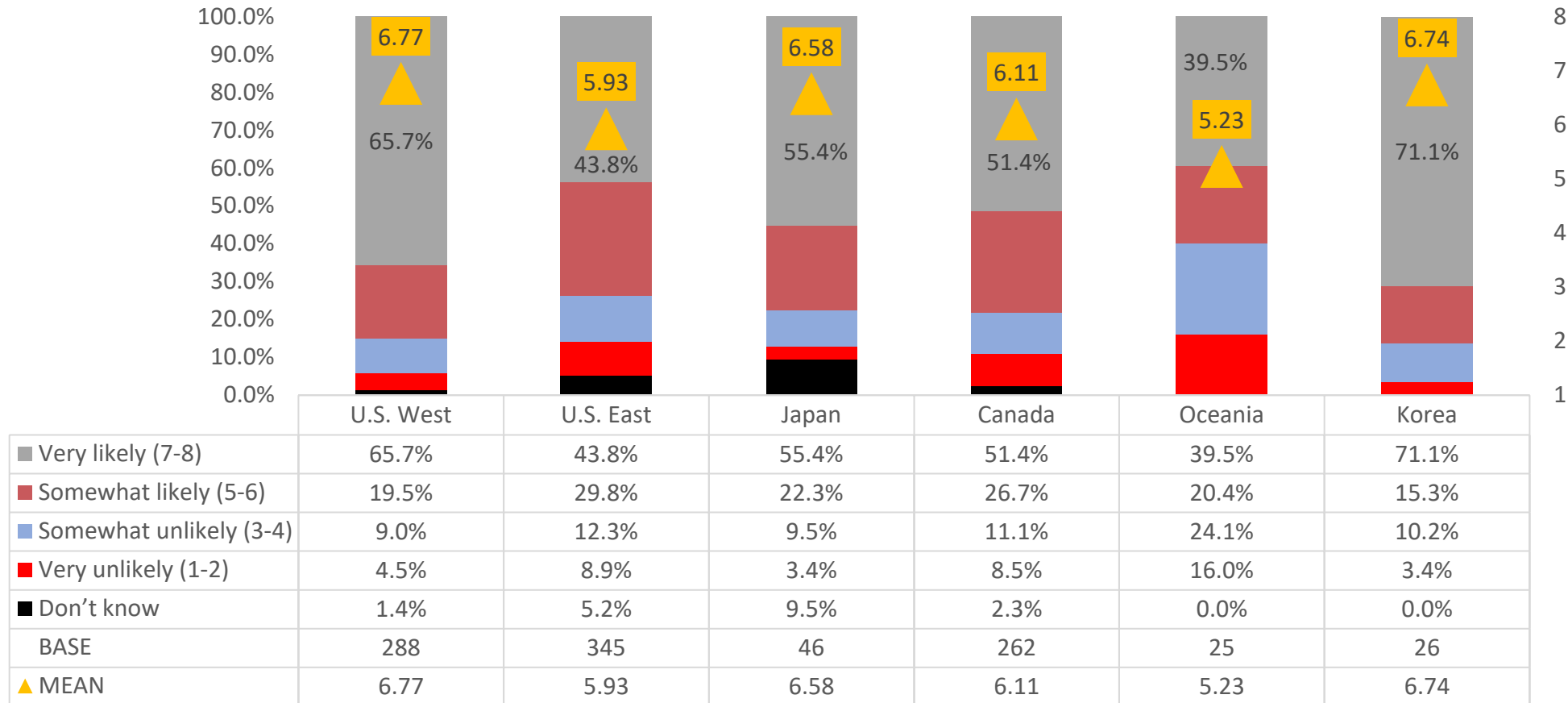
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

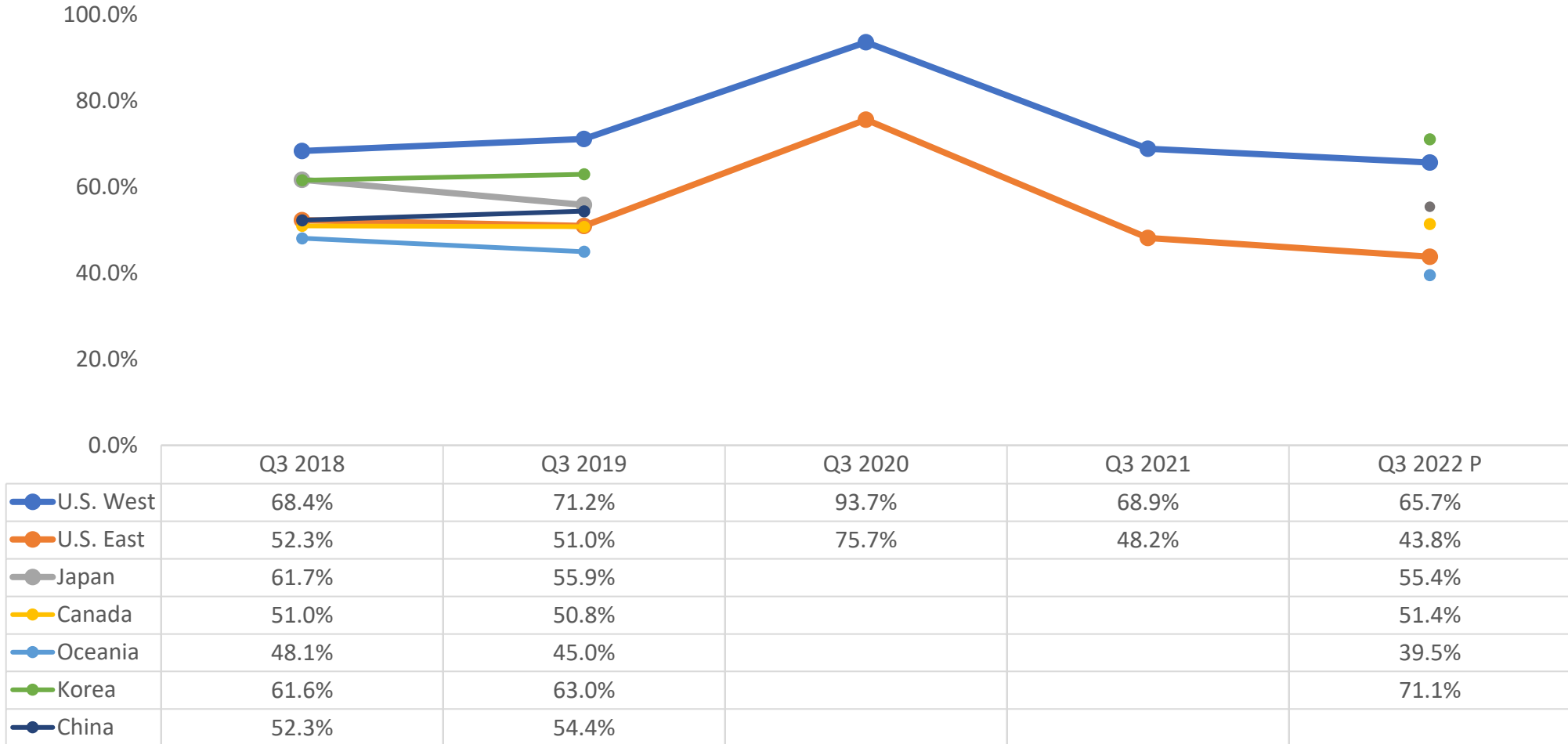
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



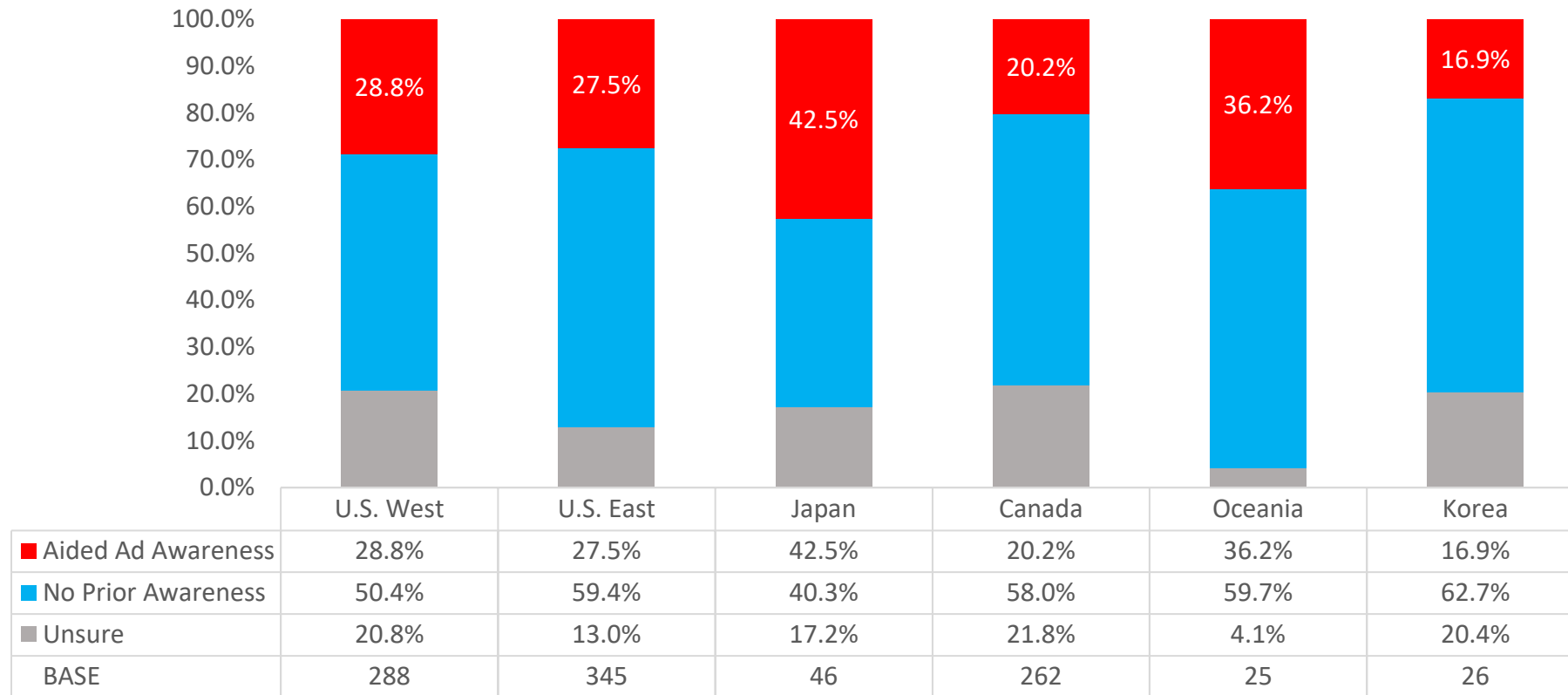
LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



AIDED ADVERTISING AWARENESS ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	47.7%	58.4%	42.7%	52.8%	60.3%	49.1%
Outdoor or sporting activities/ events	19.1%	18.7%	36.9%	24.0%	15.9%	25.5%
Hawaiian cultural events	12.8%	16.8%	11.2%	8.8%	4.1%	3.4%
Social media posts/ videos	10.8%	11.4%	36.9%	10.3%	8.2%	13.5%
Hawaiian music	7.3%	8.7%	14.6%	6.1%	3.9%	3.4%
Television programs or movies filmed in Hawai'i	6.8%	9.5%	25.7%	9.9%	16.2%	16.9%
BASE	288	345	46	262	25	26

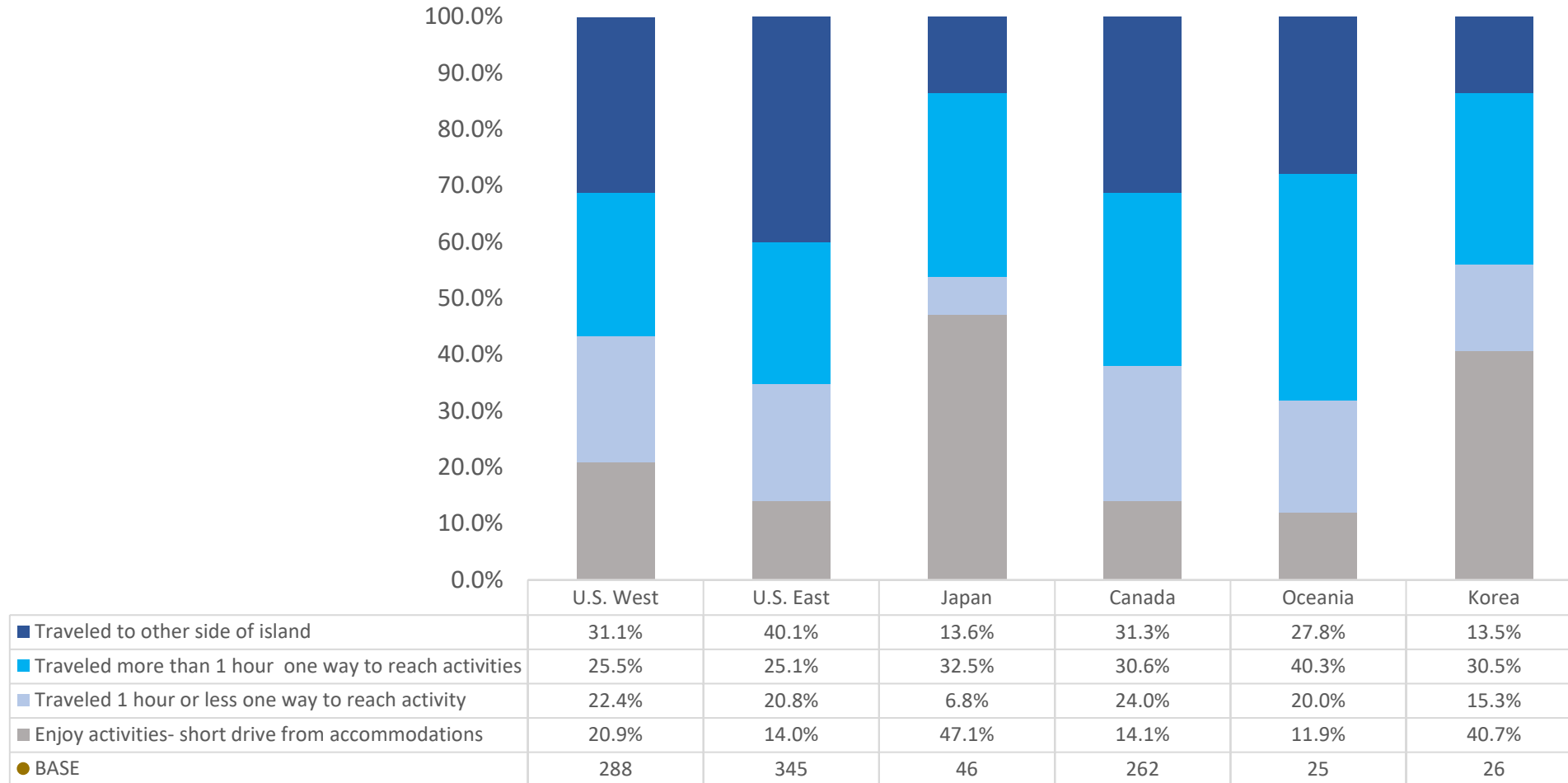
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	
'Akaka Falls	29.8%	36.1%	5.2%	34.3%	44.2%	
Botanical Gardens	26.5%	17.8%	5.2%	19.1%	15.9%	
H.N. Greenwell Store	2.8%	3.7%	0.0%	5.7%	0.0%	
Hawai'i Volcanoes National Park	60.2%	75.5%	43.5%	61.2%	60.3%	
Hilo Farmers Market	34.1%	25.1%	27.9%	29.5%	11.9%	
Hulihe'e Palace	1.8%	2.3%	5.2%	4.6%	3.9%	
'Imiloa Astronomy Ctr	2.8%	2.3%	6.9%	1.9%	3.9%	
Kaloko Honokohau National Historical Park	10.4%	11.2%	0.0%	13.7%	4.1%	
Kona Coffee Living History Farm	13.1%	19.3%	35.6%	11.5%	23.9%	
Lili'uokalani Park and Garden	9.4%	11.6%	1.7%	9.9%	11.9%	

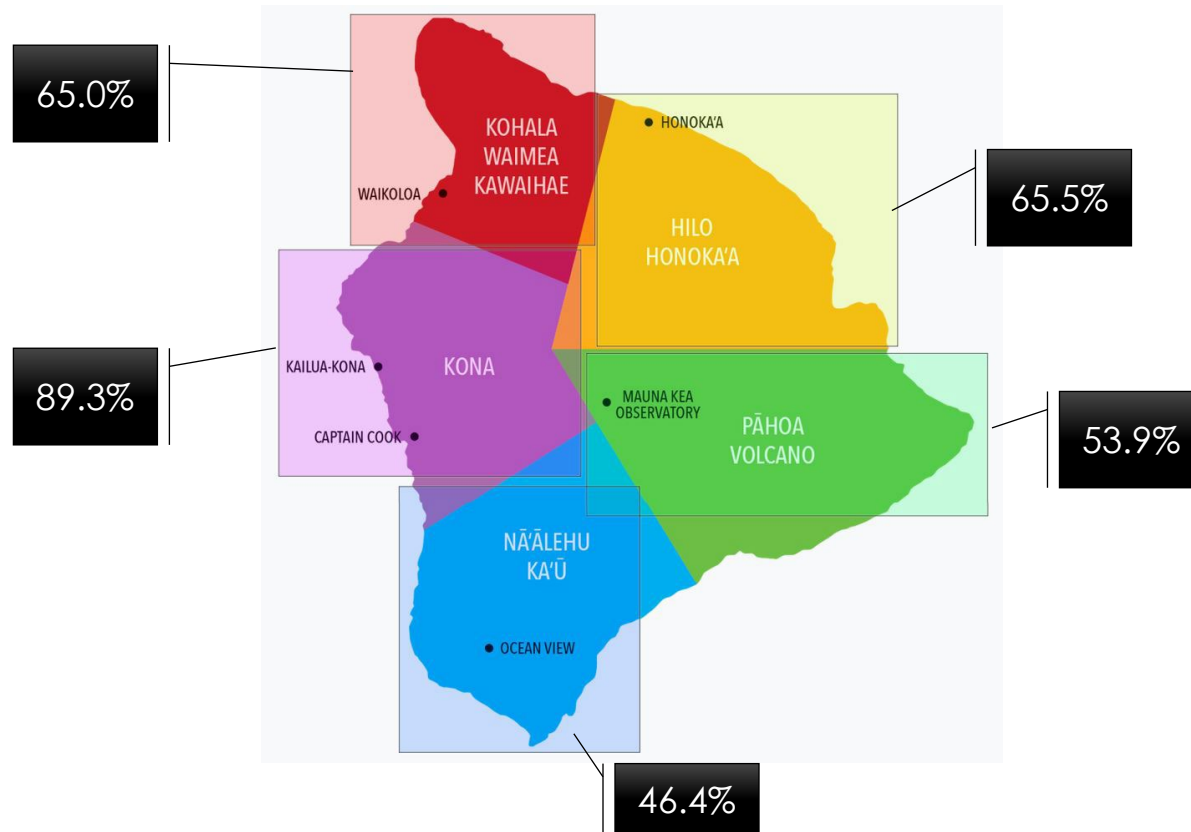
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	
Lyman House Memorial Museum	1.1%	2.0%	0.0%	0.4%	0.0%	
Maunakea Visitor Ctr/ Summit	16.3%	18.9%	29.6%	24.1%	44.2%	
Orchid Farm	2.1%	1.2%	0.0%	2.3%	0.0%	
Pacific Tsunami Museum	2.8%	1.7%	3.5%	1.5%	0.0%	
Pana'ewa Rainforest Zoo & Garden	5.6%	4.9%	1.7%	3.8%	4.1%	
Pu'uhonua o Honaunau National Historical Park	20.7%	21.5%	3.5%	26.3%	4.1%	
Pu'ukohola Heia National Historical Site	11.9%	14.2%	5.2%	12.2%	0.0%	
Punalu'u Black Sand Beach	39.3%	43.4%	16.5%	42.5%	36.2%	
Rainbow Falls	30.9%	38.4%	8.6%	30.2%	44.0%	
Volcano Art Center	10.0%	11.7%	8.6%	10.3%	12.1%	

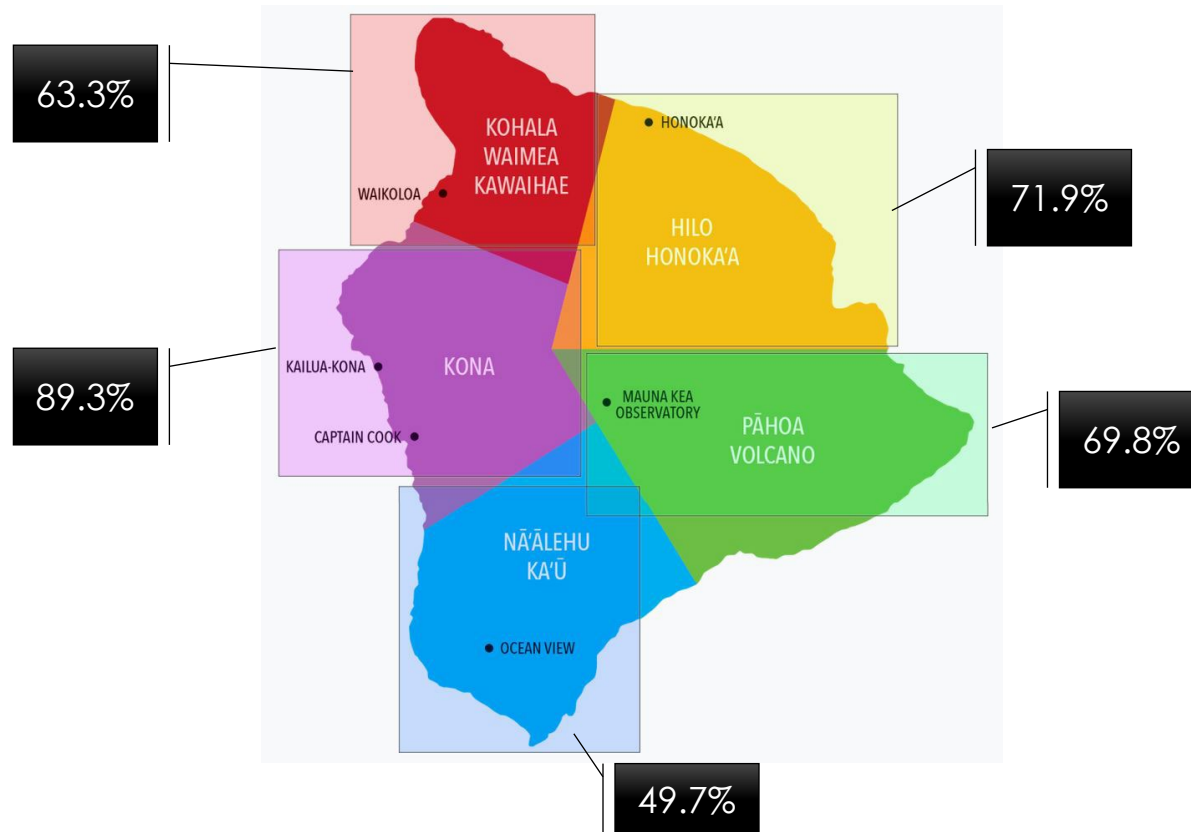
TRAVEL ON ISLAND OF HAWAI'I



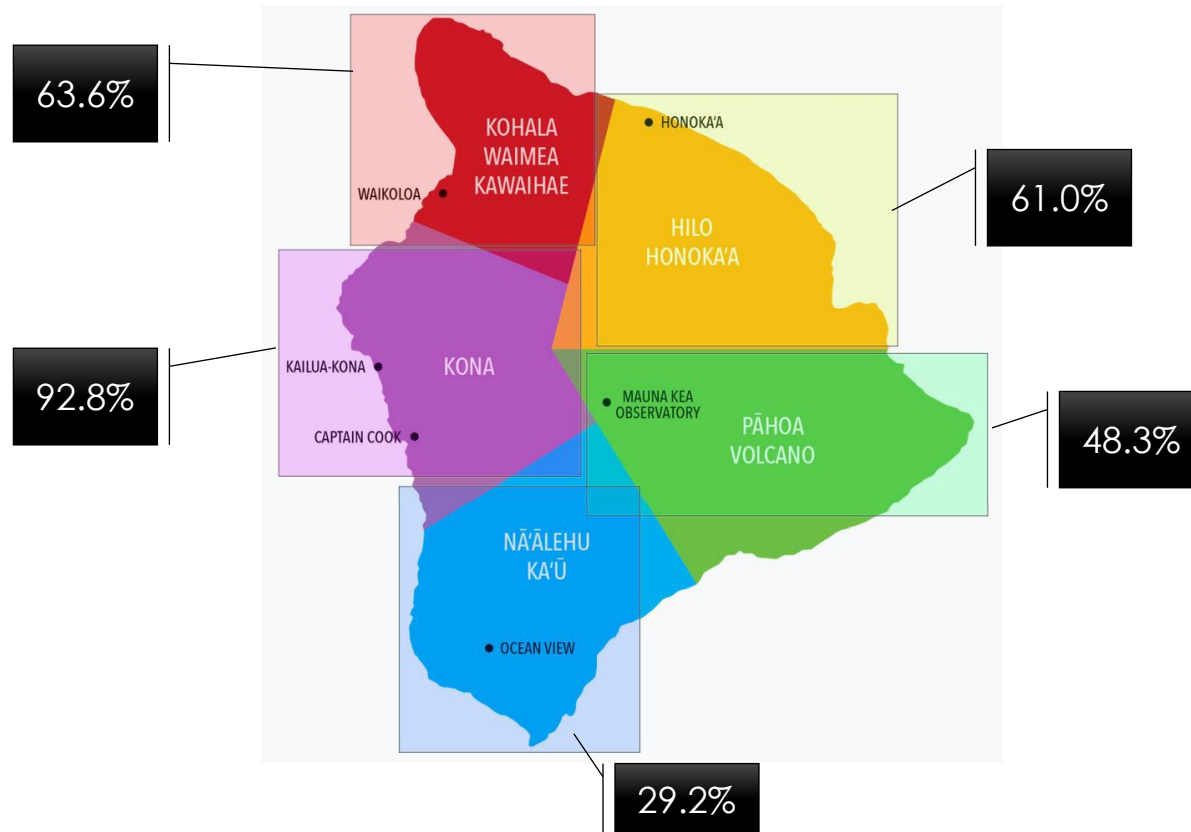
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



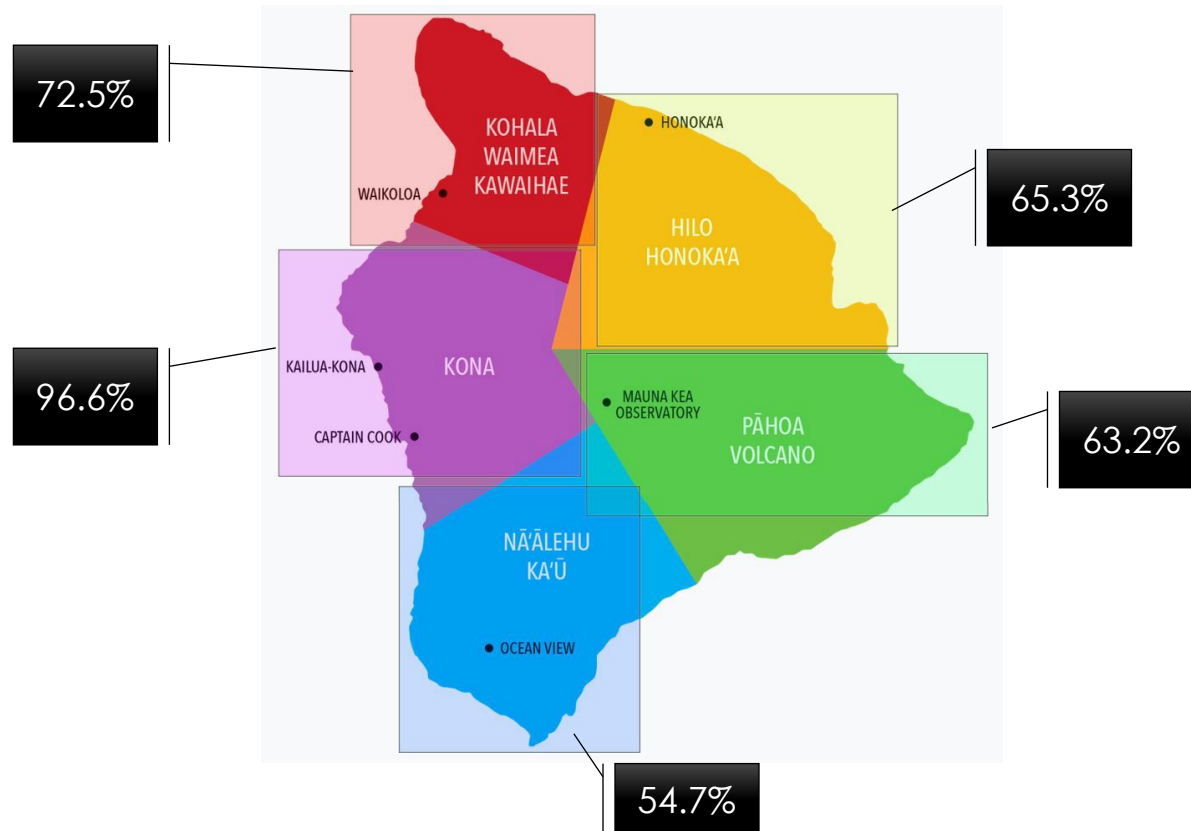
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



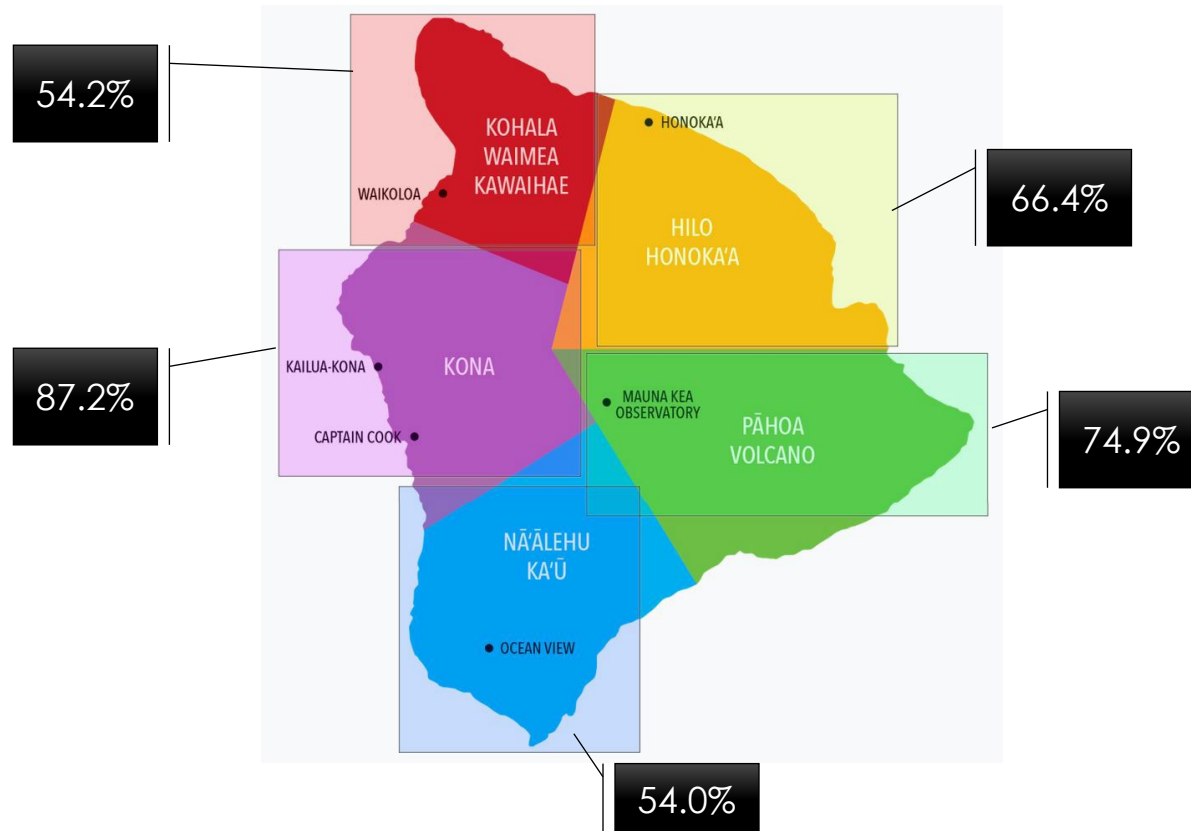
AREAS VISITED ISLAND OF HAWAI'I JAPAN



AREAS VISITED ISLAND OF HAWAI'I CANADA

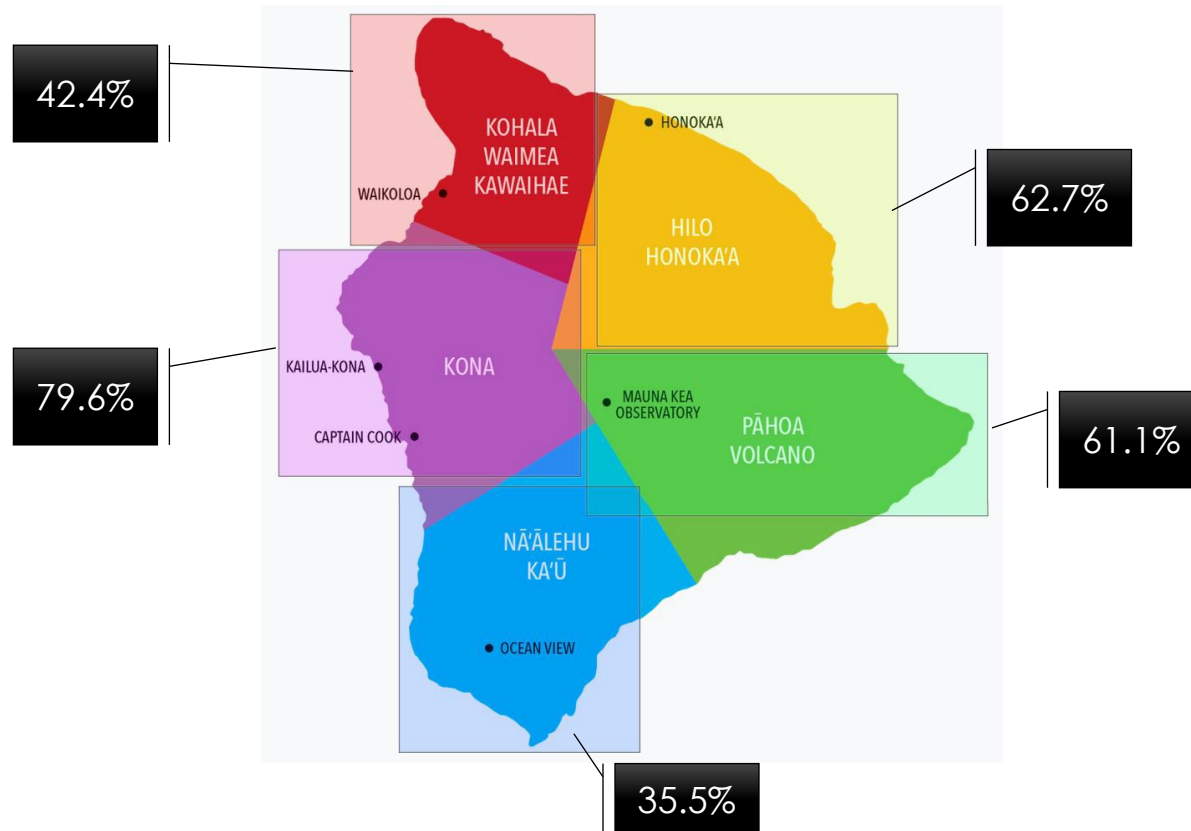


AREAS VISITED ISLAND OF HAWAI'I OCEANIA

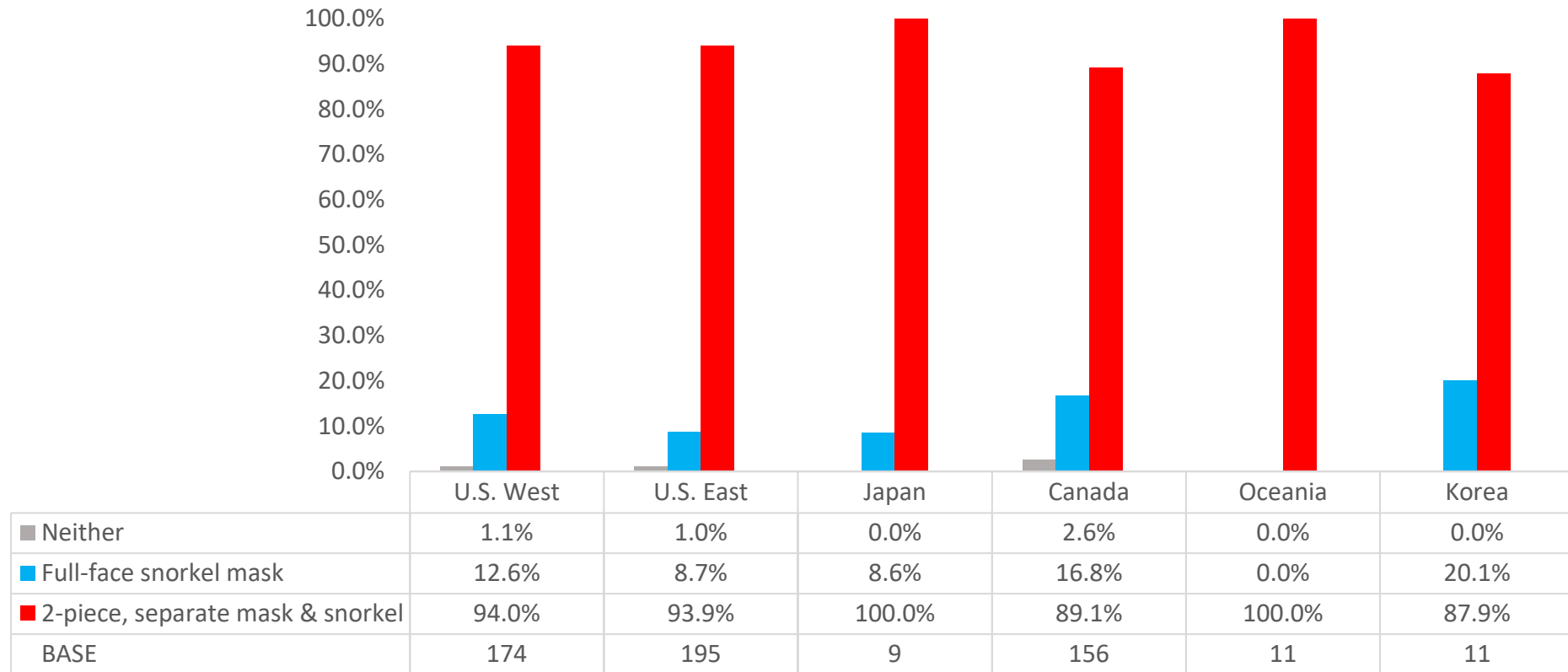


140 Q. Which of the following areas did you visit during your stay on Hawai'i Island?

AREAS VISITED ISLAND OF HAWAI'I KOREA



SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I

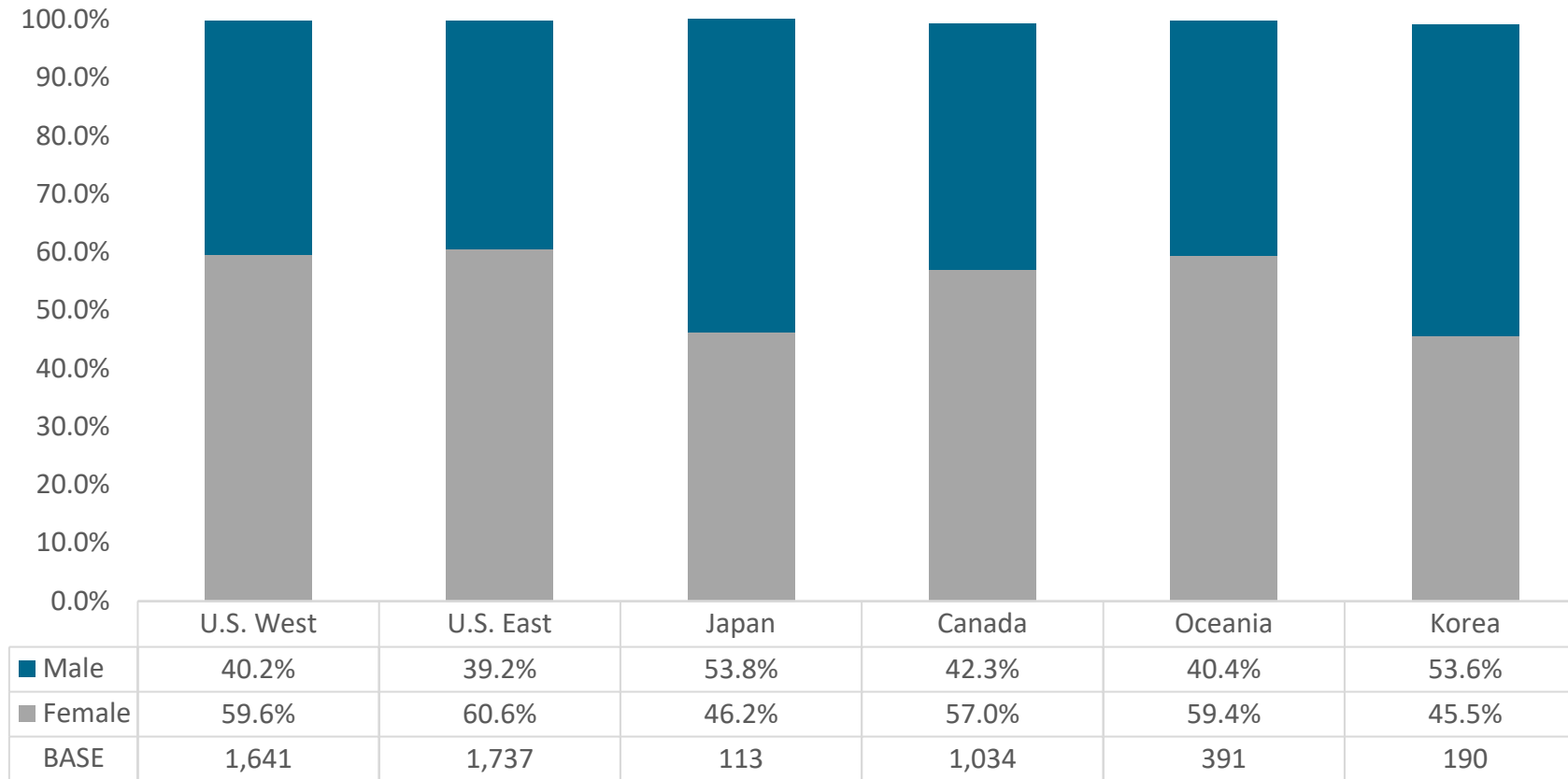


SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

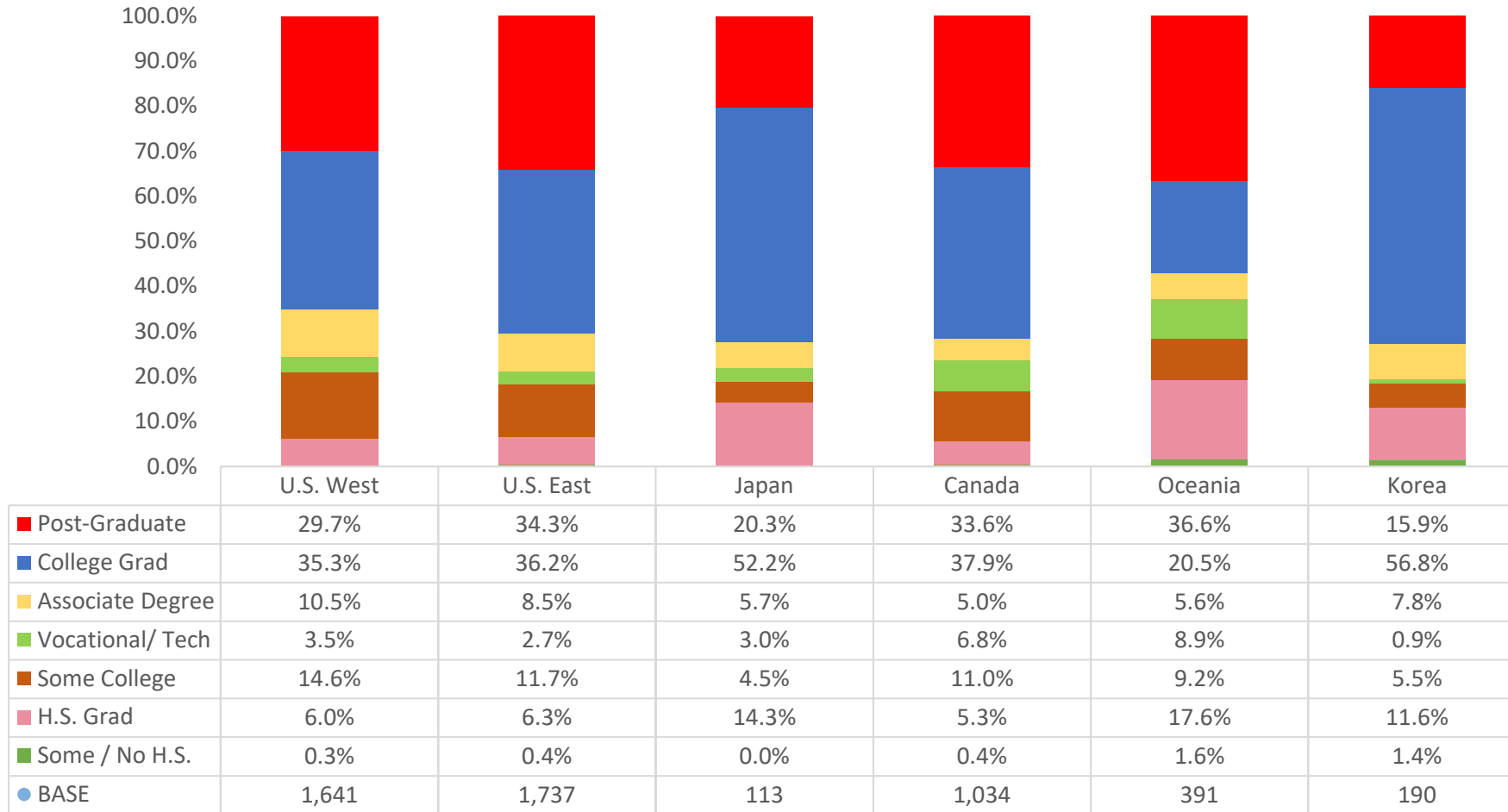
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	99.4%	99.0%	100.0%	99.3%	100.0%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	0.6%	1.0%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
BASE	172	193	9	152	11	11

Section 9 – VISITOR PROFILE

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania
< \$40,000	5.6%	5.0%	4.0%	7.1%
\$40,000 to \$59,999	6.5%	6.8%	6.8%	6.5%
\$60,000 to \$79,999	9.2%	10.0%	9.7%	10.3%
\$80,000 to \$99,999	9.7%	10.0%	8.8%	9.7%
\$100,000 to \$124,999	13.3%	12.9%	13.2%	10.1%
\$125,000 to \$149,999	12.0%	11.9%	12.5%	10.6%
\$150,000 to \$174,999	9.6%	9.2%	10.8%	10.6%
\$175,000 to \$199,999	6.9%	7.1%	10.1%	9.7%
\$200,000 to \$249,999	8.6%	9.2%	9.8%	9.7%
\$250,000 +	18.6%	17.8%	14.6%	15.8%

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	12.6%
¥3.5 - ¥4.5 million	5.0%
¥4.5 - ¥5.5 million	5.8%
¥5.5 - ¥6.5 million	2.5%
¥6.5 - ¥7.5 million	5.0%
¥7.5 - ¥8.5 million	9.1%
¥8.5 - ¥10.0 million	7.9%
¥10.0 - ¥15.0 million	22.1%
¥15.0 - ¥20.0 million	18.4%
¥20.0 million +	11.6%

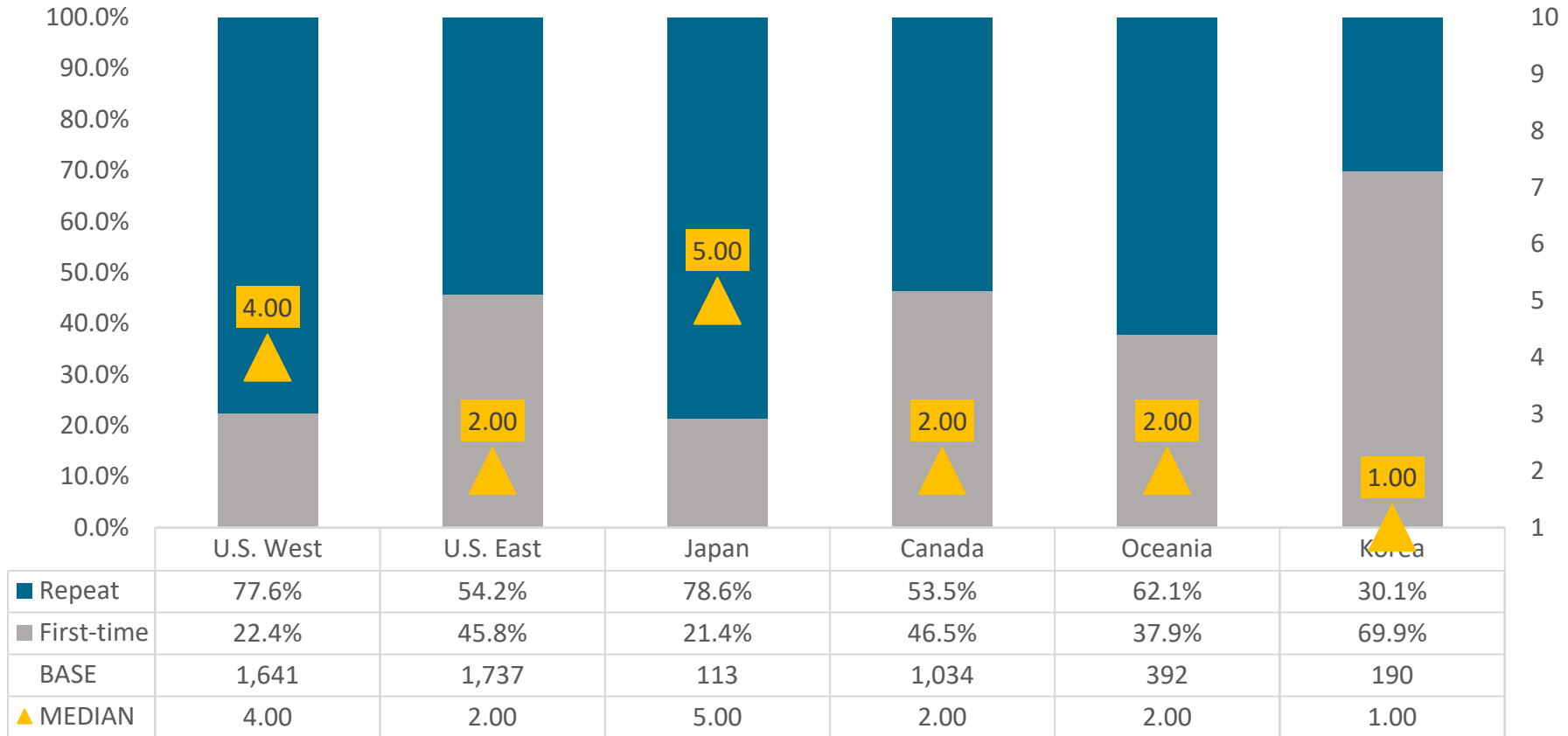
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	7.8%
₩16,305,000-27,173,999	8.3%
₩27,174,000-38,041,999	13.3%
₩38,042,000-48,911,999	8.8%
₩48,912,000-59,781,999	11.3%
₩59,782,000-70,652,999	6.3%
₩70,653,000-81,520,999	9.3%
₩81,521,000-92,390,999	8.3%
₩92,391,000-103,259,999	6.3%
₩103,260,000-149,999,999	12.4%
₩150,000,000-199,999,999	2.0%
₩200,000,000+	5.8%

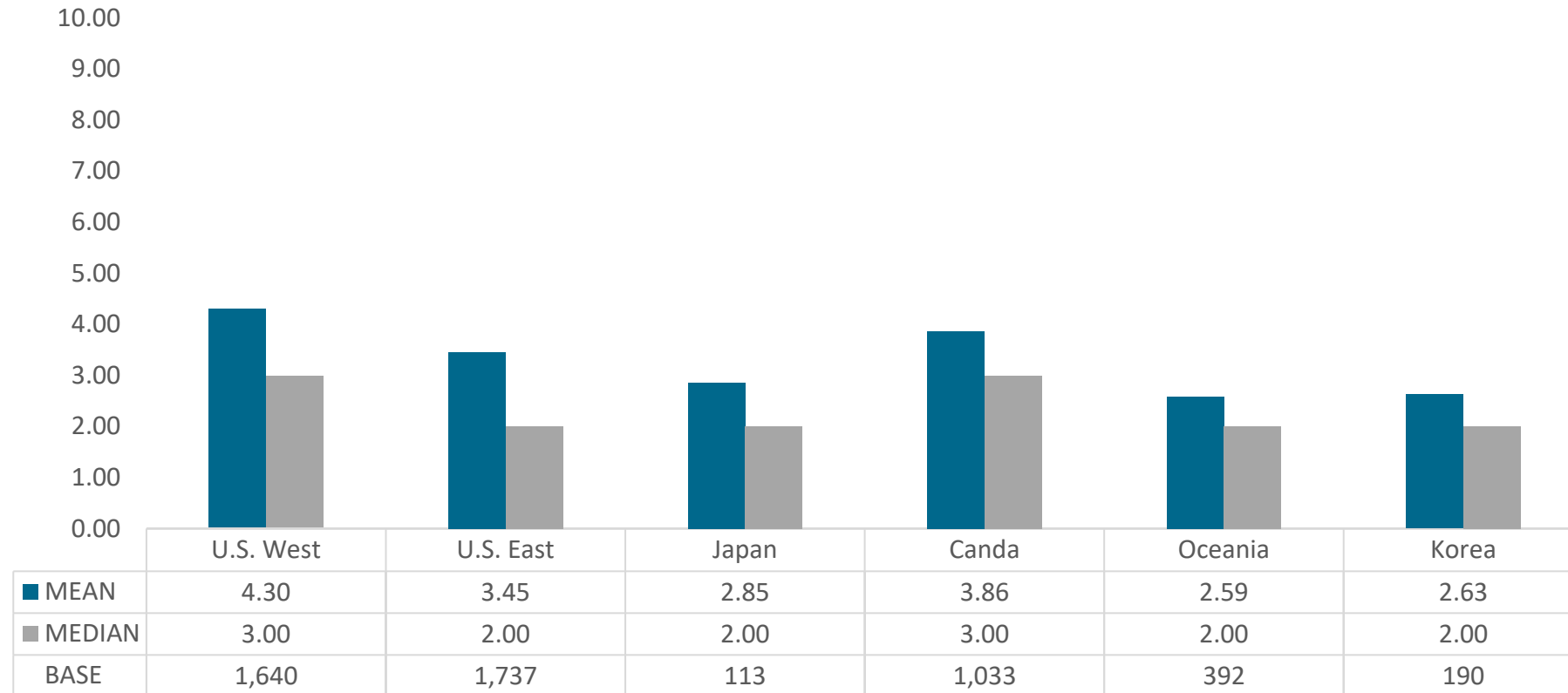
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Spouse	58.9%	60.8%	41.6%	61.9%	58.8%	70.6%
Other adult family	31.0%	29.5%	13.5%	30.6%	17.6%	10.2%
Child <18	30.9%	25.1%	12.7%	31.3%	19.8%	6.9%
Friend/ Associate	15.8%	14.3%	24.2%	15.0%	11.3%	11.6%
Alone	8.9%	10.2%	19.6%	5.2%	16.1%	4.5%
Girlfriend/ boyfriend	6.8%	6.2%	6.4%	7.9%	5.1%	3.6%
Same sex partner	1.0%	0.7%	0.0%	0.4%	1.5%	0.5%

Section 10 – 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 summarizes the number of surveys completed for the island of O'ahu.

MMA	Completed	Margin of Error +
U.S. West	730	3.63
U.S. East	987	3.12
Japan	72	11.55
Canada	493	4.41
Oceania	363	5.14
Korea	176	7.39
China	26	19.22
All MMAs	2,847	1.84

155 * Margins of error are presented at the 95% 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 ±
U.S. West	251	6.19
U.S. East	266	6.01
Japan	4	49.00
Canada	187	7.17
Oceania	15	25.30
Korea	4	49.00
China	2	69.30
All MMAs	729	3.63

156 * Margins of error are presented at the 95% 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 +
U.S. West	531	4.25
U.S. East	632	3.90
Japan	6	40.01
Canada	326	5.43
Oceania	37	16.11
Korea	9	32.67
China	7	37.04
All MMAs	1,548	2.49

157 * Margins of error are presented at the 95% 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 summarizes the number of surveys completed for the island of Hawai'i.

MMA	Completed	Margin of Error +
U.S. West	303	5.63
U.S. East	400	4.90
Japan	47	14.29
Canada	283	5.83
Oceania	26	19.22
Korea	26	19.22
China	13	27.18
All MMAs	1,098	2.96

158 * Margins of error are presented at the 95% level of confidence