

# VISITOR SATISFACTION STUDY Q4 2022

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

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# 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 4, 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 $\pm$	Response Rate
U.S. West	1,460	2.56	16.22
U.S. East	1,577	2.47	17.52
Japan	61	12.55	9.34
Canada	1,210	2.82	23.63
Oceania	340	5.31	15.24
Korea	162	7.70	27.00
China	35	16.56	6.60
All visitor markets	4,845	1.41	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 4, 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

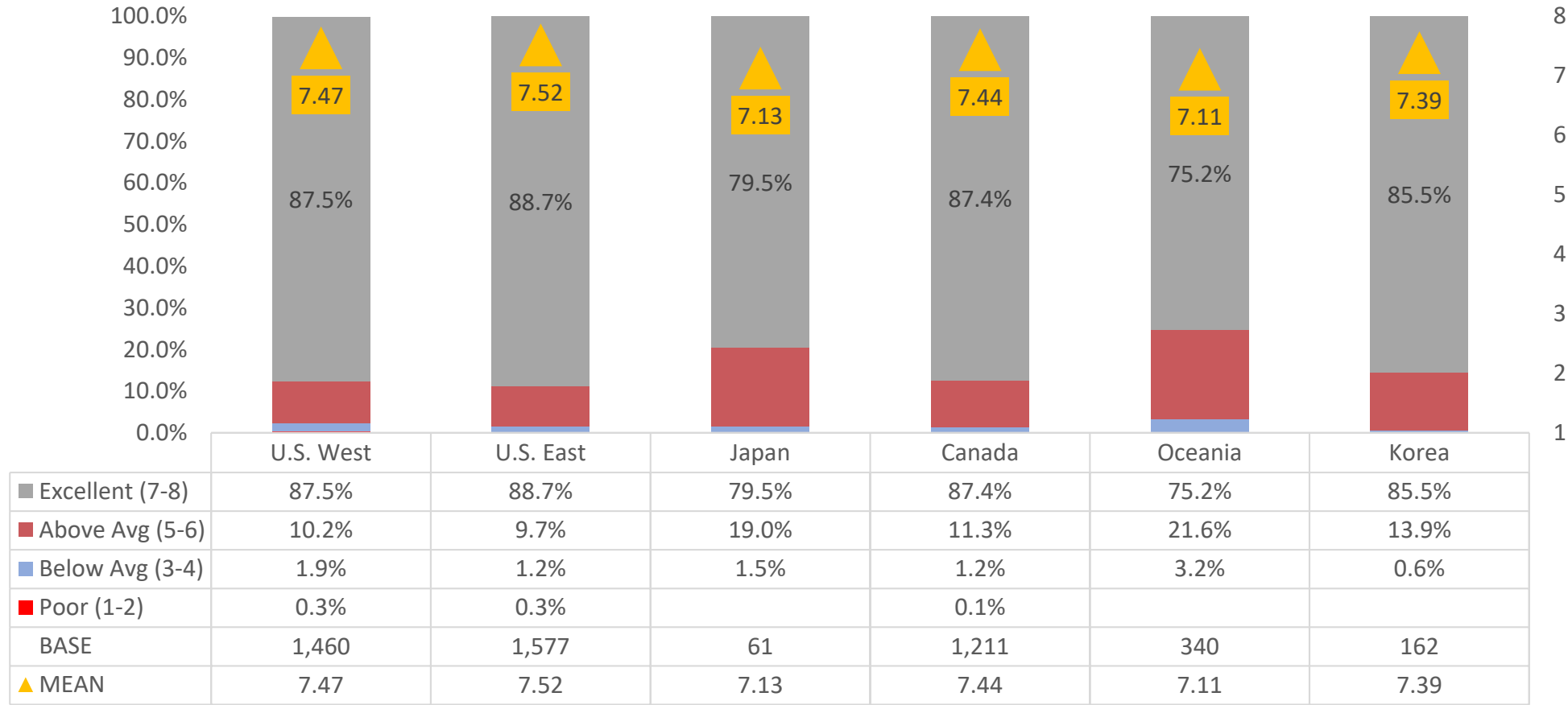
Most international visitor markets have relaxed travel restrictions and quarantine requirements by the third quarter of 2022. However, there continued to be limited direct flights to Hawai'i from Japan, Korea and Oceania. There have been no direct flights from China since service ended in February 2020.

*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 (1/3)

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



# Satisfaction - State of Hawai'i by Visitor Market (2/3)

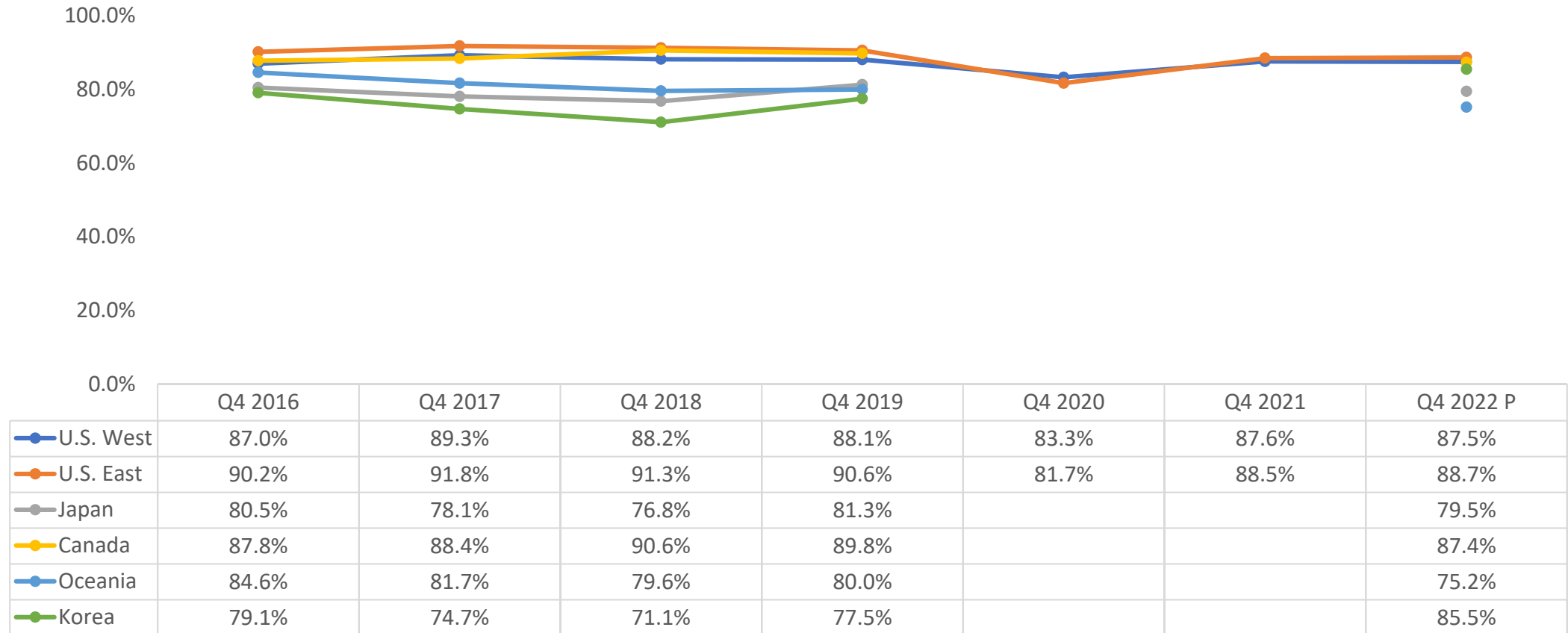
- **Gender:** Female respondents from U.S. East and U.S. West gave higher satisfaction scores than male respondents.
- **Trips to Hawai'i:** Among respondents from Japan, first-time visitors gave higher satisfaction scores compared to repeat visitors.



# Satisfaction - State of Hawai'i by Visitor Market (3/3)

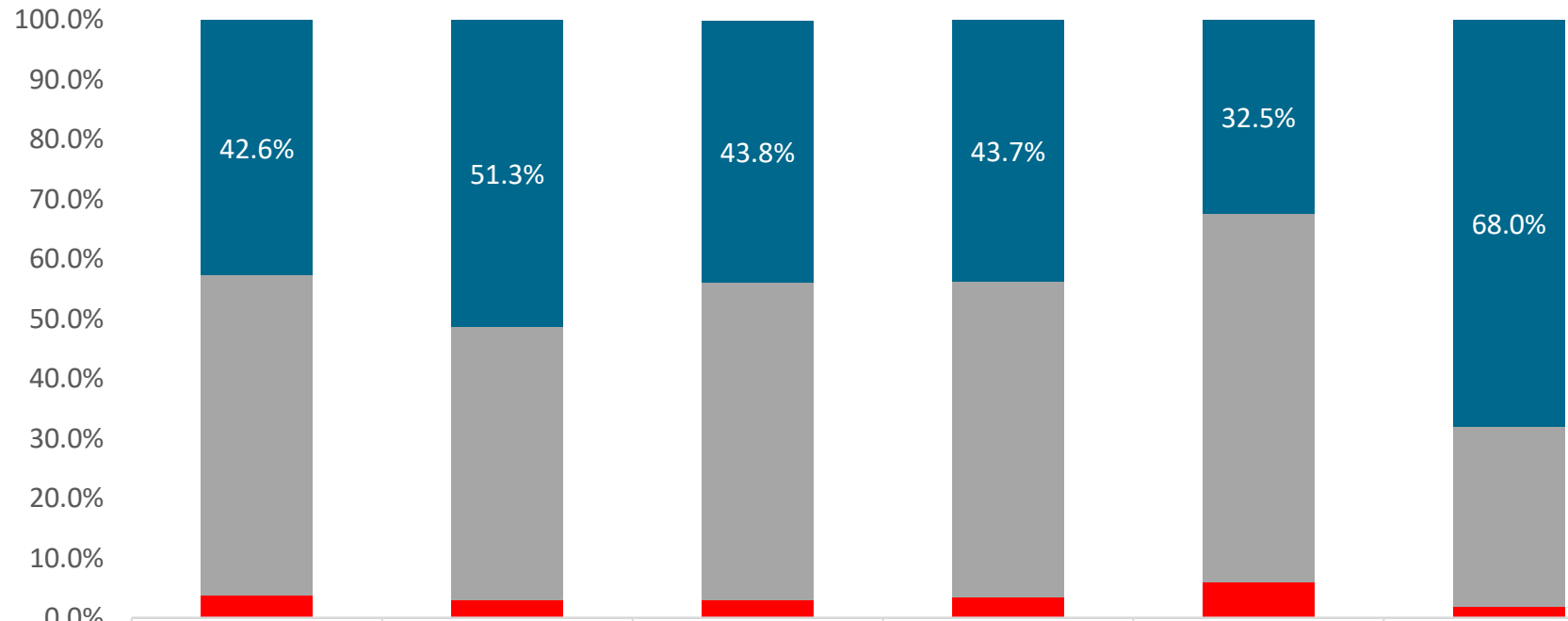
Tracking Data – Rating of “Excellent” (7-8)

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



P= Preliminary Data

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS (1/3)



	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Exceeded expectations	42.6%	51.3%	43.8%	43.7%	32.5%	68.0%
Met expectations	53.5%	45.7%	53.1%	52.9%	61.7%	30.2%
Did NOT meet expectations	3.8%	3.0%	3.0%	3.4%	5.9%	1.8%
BASE	1,460	1,577	61	1,211	340	162

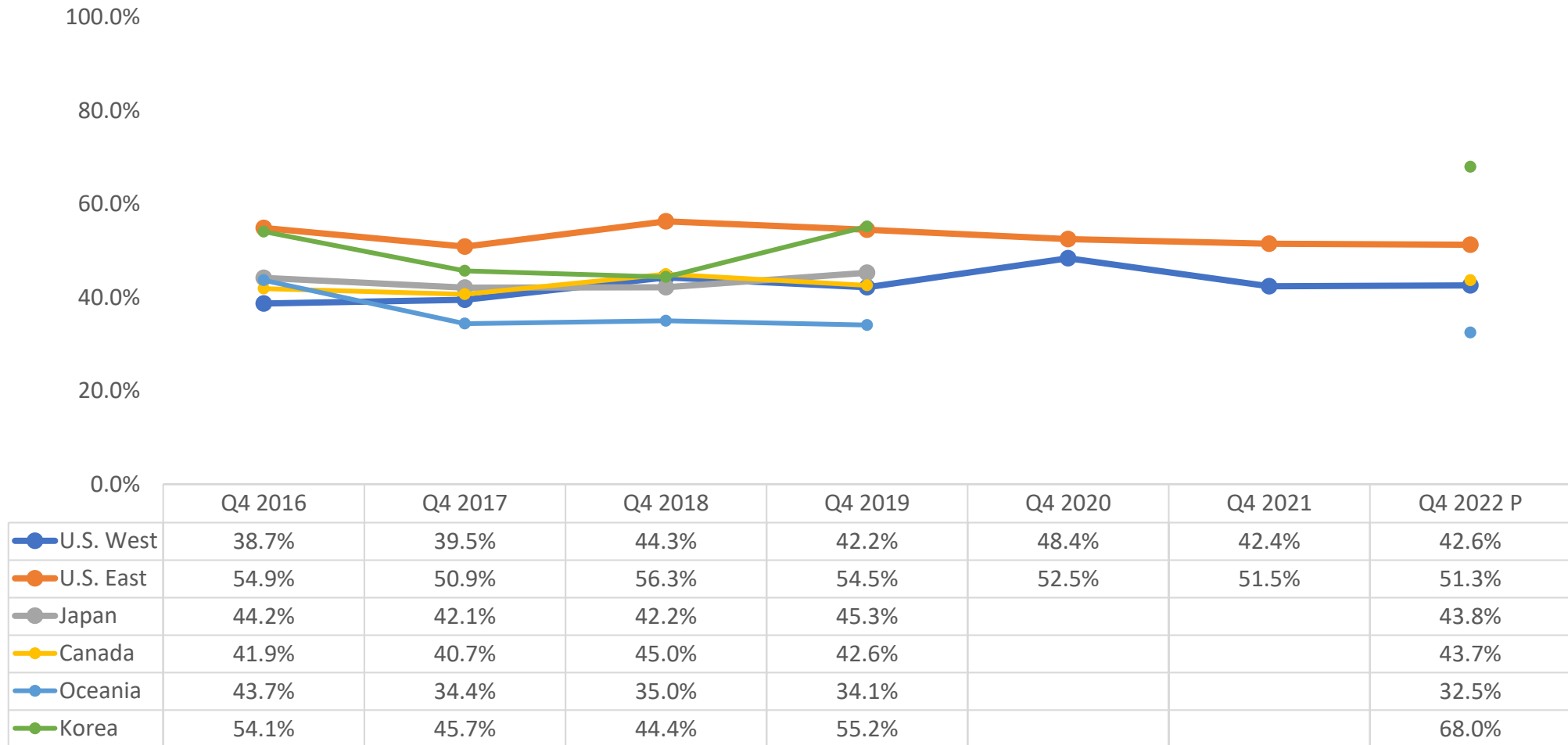
# SATISFACTION – HAWAI’I TRIP EXPECTATIONS (2/3)

- ***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, Oceania and Canada.
- ***Age:*** Younger respondents (between 18 – 34 years old) from U.S. West, U.S. East, Japan, and Canada were more likely to respond that their trip exceeded expectations compared to visitors from these markets in other age groups.
- ***Gender:*** Female visitors from U.S. West and U.S. East gave higher mean satisfaction scores compared to male visitors.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS (3/3)

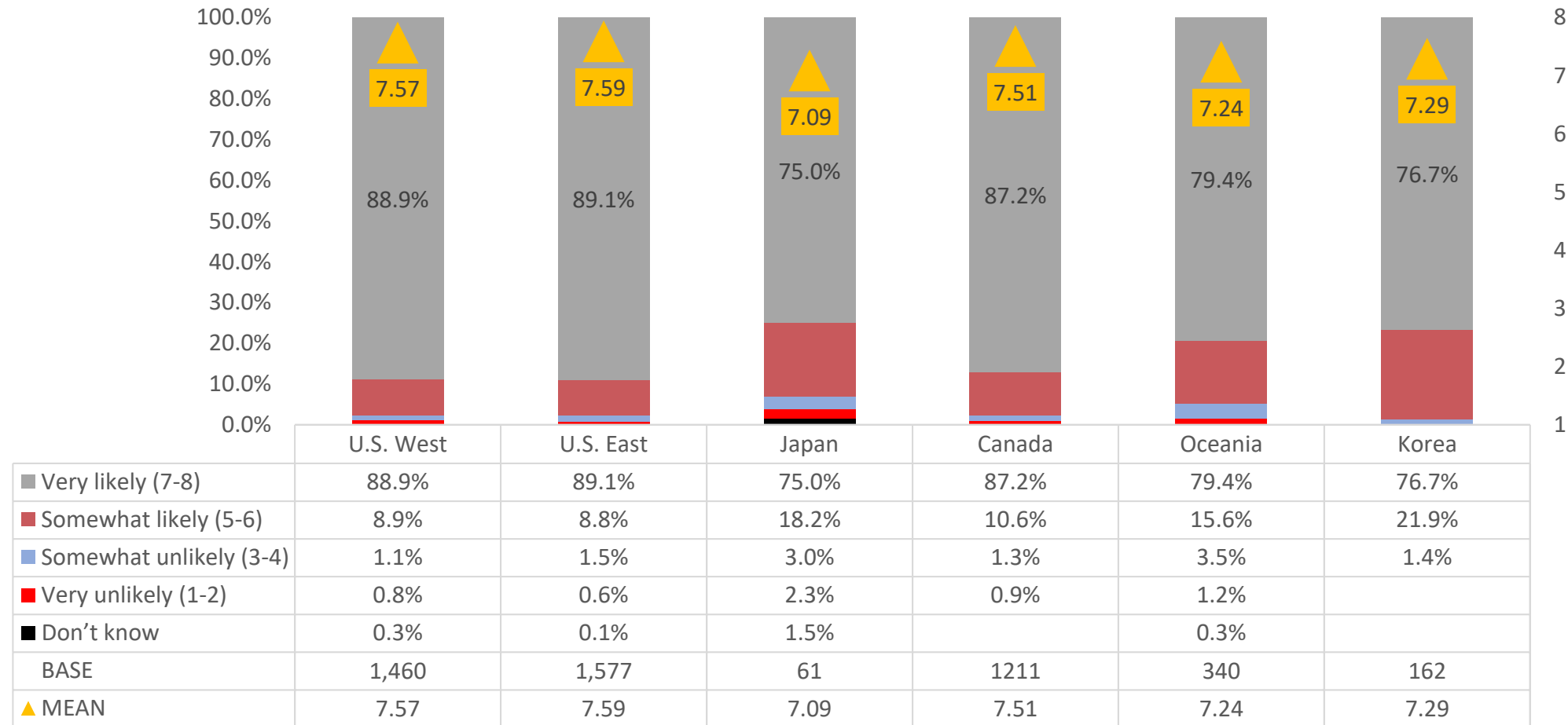
Tracking Data – Rating of “Exceeded expectations”

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



# BRAND/ DESTINATION - ADVOCACY (1/3)

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

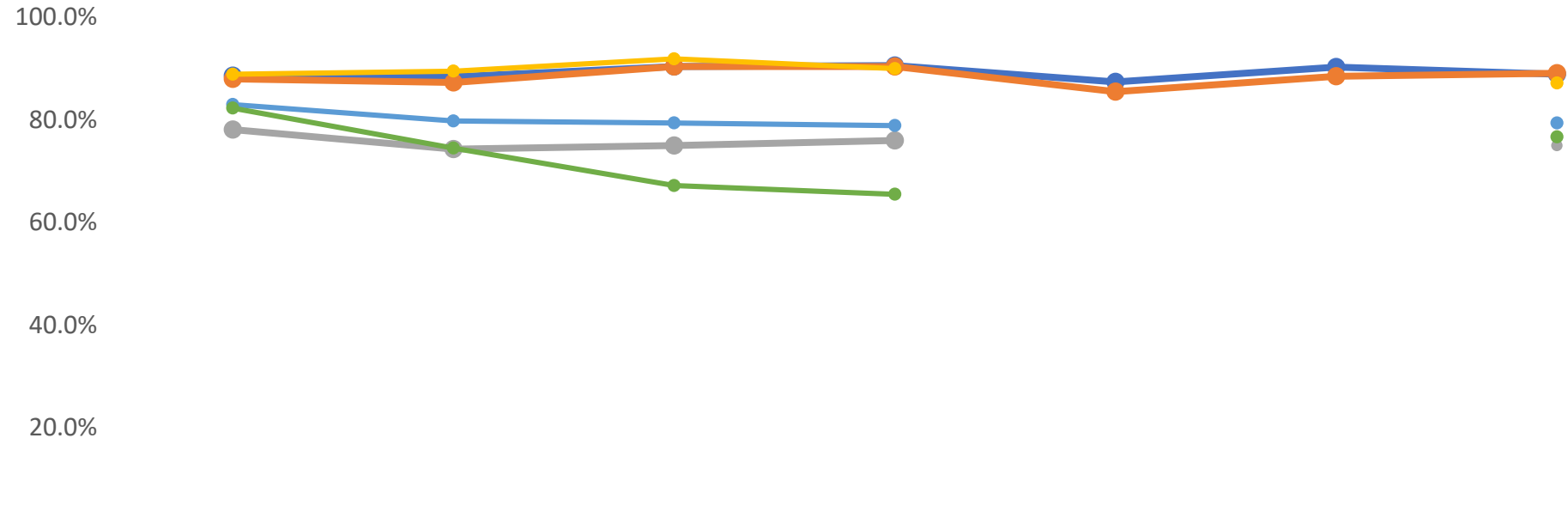


# BRAND/ DESTINATION - ADVOCACY (2/3)

- ***Trips to Hawai'i:*** Repeat visitors from U.S. West gave higher mean scores compared to first-time visitors from this market.
- ***Gender:*** Females from U.S. West and U.S. East were more likely to recommend the state to others than males from these visitor markets.
- ***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 (3/3)

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

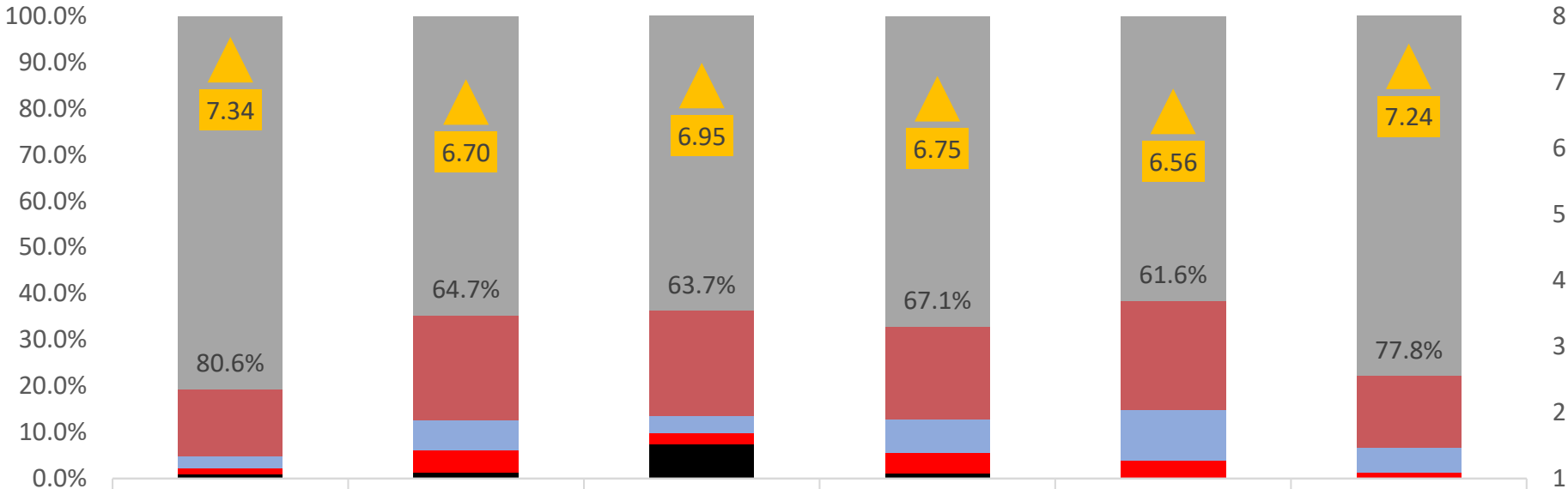


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	88.6%	88.4%	90.4%	90.6%	87.4%	90.3%	88.9%
U.S. East	88.0%	87.3%	90.4%	90.4%	85.5%	88.5%	89.1%
Japan	78.1%	74.3%	75.0%	76.0%			75.0%
Canada	88.9%	89.5%	91.9%	90.0%			87.2%
Oceania	83.0%	79.8%	79.4%	78.9%			79.4%
Korea	82.3%	74.5%	67.2%	65.5%			76.7%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT (1/3)

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



	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Very likely (7-8)	80.6%	64.7%	63.7%	67.1%	61.6%	77.8%
Somewhat likely (5-6)	14.5%	22.8%	22.7%	19.9%	23.5%	15.5%
Somewhat unlikely (3-4)	2.5%	6.4%	3.8%	7.3%	11.0%	5.5%
Very unlikely (1-2)	1.4%	4.7%	2.3%	4.6%	3.9%	1.2%
Don't know	0.9%	1.4%	7.5%	1.0%		
BASE	1,460	1,577	61	1211	340	162
MEAN	7.34	6.70	6.95	6.75	6.56	7.24

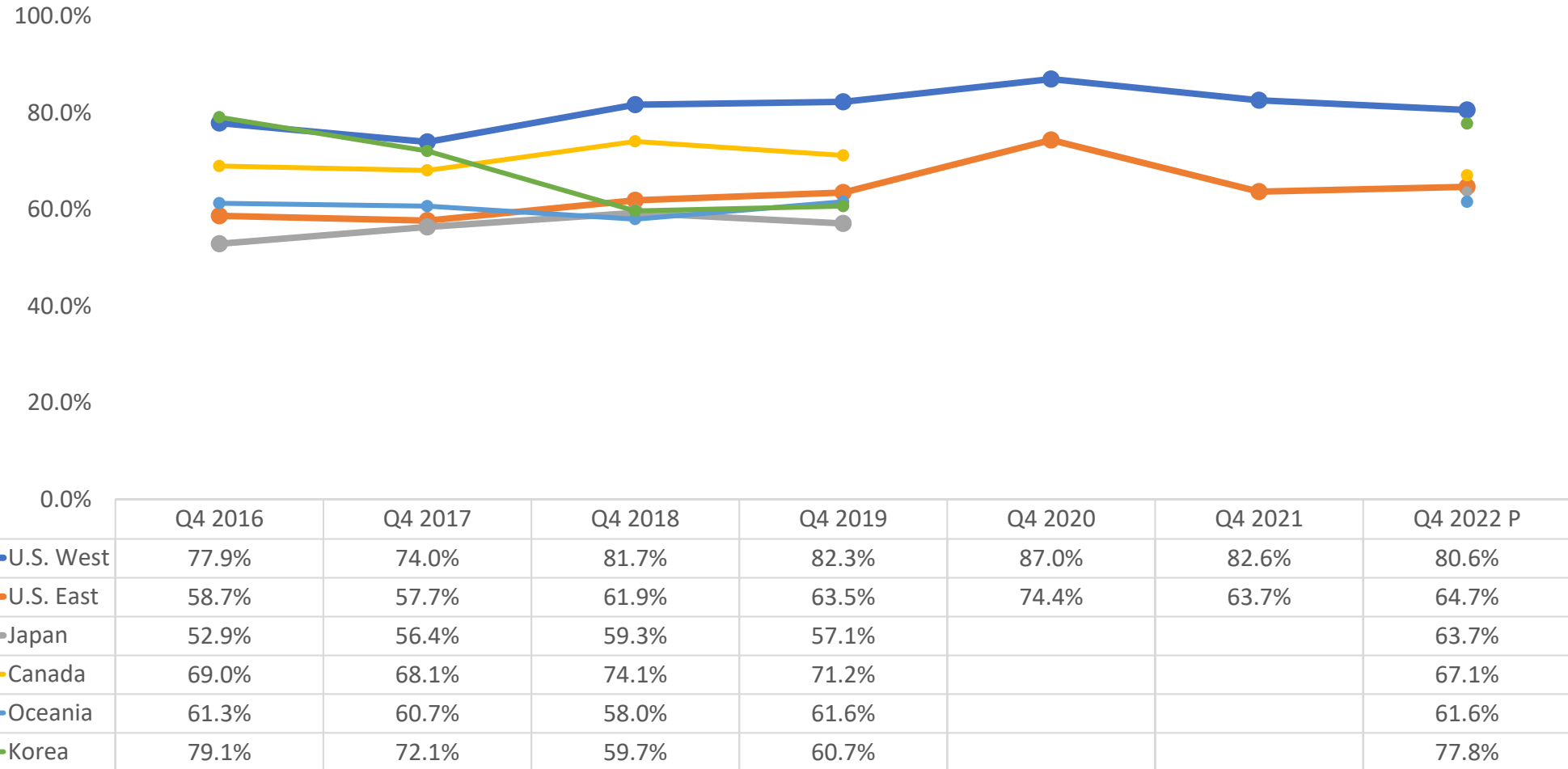


# LIKELIHOOD OF RETURN VISIT (2/3)

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets expressed 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 Japan expressed a stronger likelihood to return than males from this visitor market.
- ***Travel party size:*** Visitors who traveled to the state in smaller travel parties 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.
- ***Household income (Dollar):*** More affluent visitors from U.S. West expressed 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 those who visited multiple islands during their stay.
- ***Education:*** Those without a college degree from Japan expressed a greater likelihood of returning to the state compared to those with a college degree.

# LIKELIHOOD OF RETURN VISIT (3/3)

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



P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q4 2021	Q4 2022 P
39.0% Too expensive	54.4% Too expensive
29.7% Poor value	34.9% Too crowded/ congested/ traffic
28.0% Want to go someplace new	28.6% Want to go someplace new
23.7% COVID-19	24.5% Poor value
19.2% Too crowded/ congested/ traffic	18.6% Too commercialized/ overdeveloped
17.1% Flight too long	12.8% No reason to return/ nothing new
15.4% No reason to return/ nothing new	11.8% Unfriendly people/ felt unwelcome
10.9% Unfriendly people/ felt unwelcome	11.8% Other financial obligations
	11.5% Flight too long
	11.5% Five years is too soon

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q4 2021	Q4 2022 P
46.7% Too expensive	55.9% Too expensive
35.8% Flight too long	40.6% Flight too long
28.8% Want to go someplace new	37.0% Want to go someplace new
21.5% Poor value	19.4% Poor value
13.7% COVID-19	15.6% Five years is too soon
12.3% Other financial obligations	14.6% Too crowded/ congested/ traffic
11.5% Too crowded/ congested/ traffic	13.9% Other financial obligations
	12.2% Too commercialized/ overdeveloped

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

Q4 2019*	Q4 2022 P
58.9% Too expensive	65.6% Too expensive
52.0% Want to go someplace new	40.3% Want to go someplace new
33.9% Flight too long	36.7% Flight too long
20.5% Poor value	23.7% Poor value
20.3% Five years is too soon	14.1% Five years is too soon
16.4% Too commercialized/ overdeveloped	13.1% Too crowded/ congested/ traffic
12.5% Too crowded/ congested/ traffic	11.0% Other financial obligations
12.0% Other financial obligations	10.4% Too commercialized/ overdeveloped

\*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

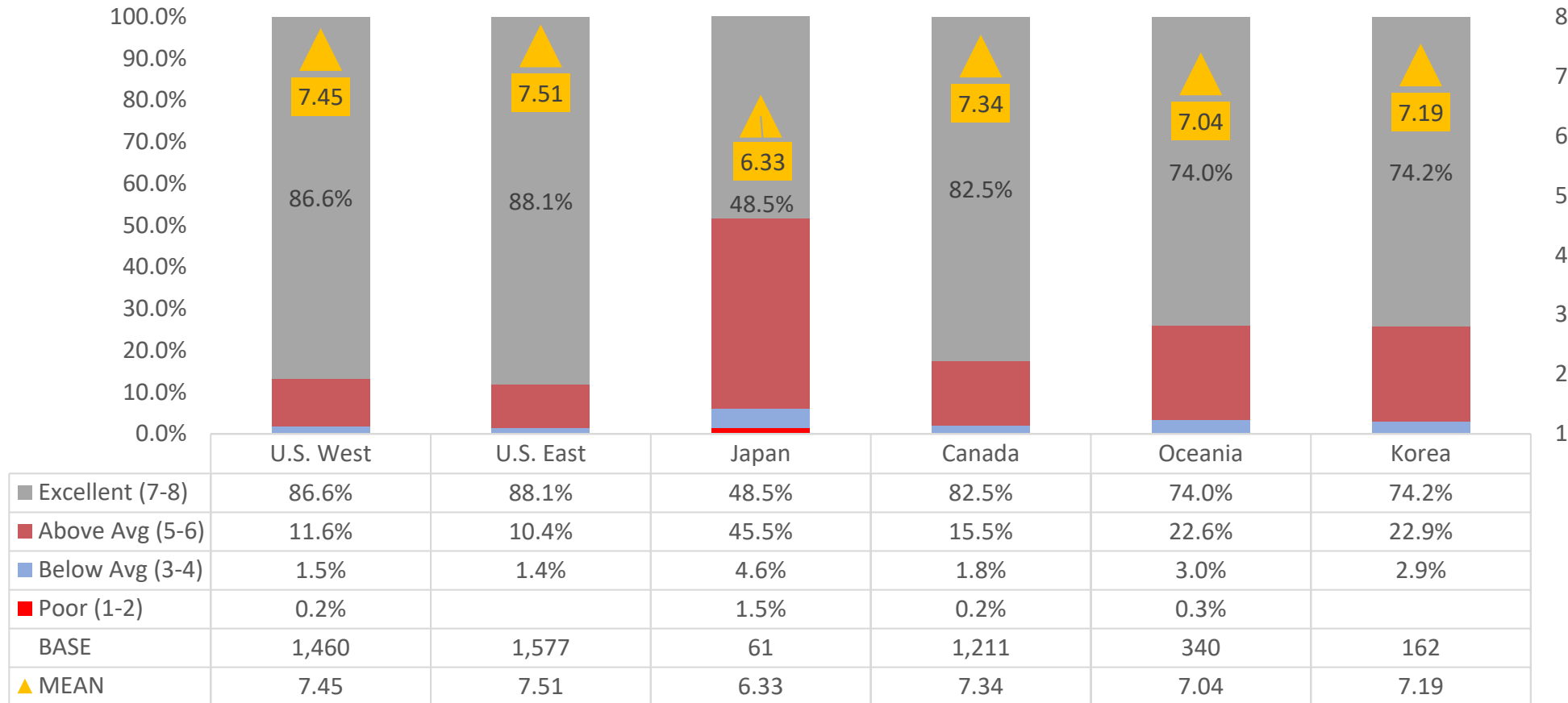
Q4 2019*	Q4 2022 P
45.8% Too expensive	62.7% Too expensive
43.4% Want to go someplace new	51.6% Poor value
28.7% Poor value	34.1% Want to go someplace new
25.6% Too crowded/ congested/ traffic	21.8% Five years is too soon
24.2% Too commercialized/ overdeveloped	20.4% No reason to return/ nothing new
20.3% Five years is too soon	18.9% Too commercialized/ overdeveloped
16.0% No reason to return/ nothing new	14.3% Flight too long
12.0% Flight too long	10.2% Too crowded/ congested/ traffic
10.0% Other financial obligations	

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

P= Preliminary Data

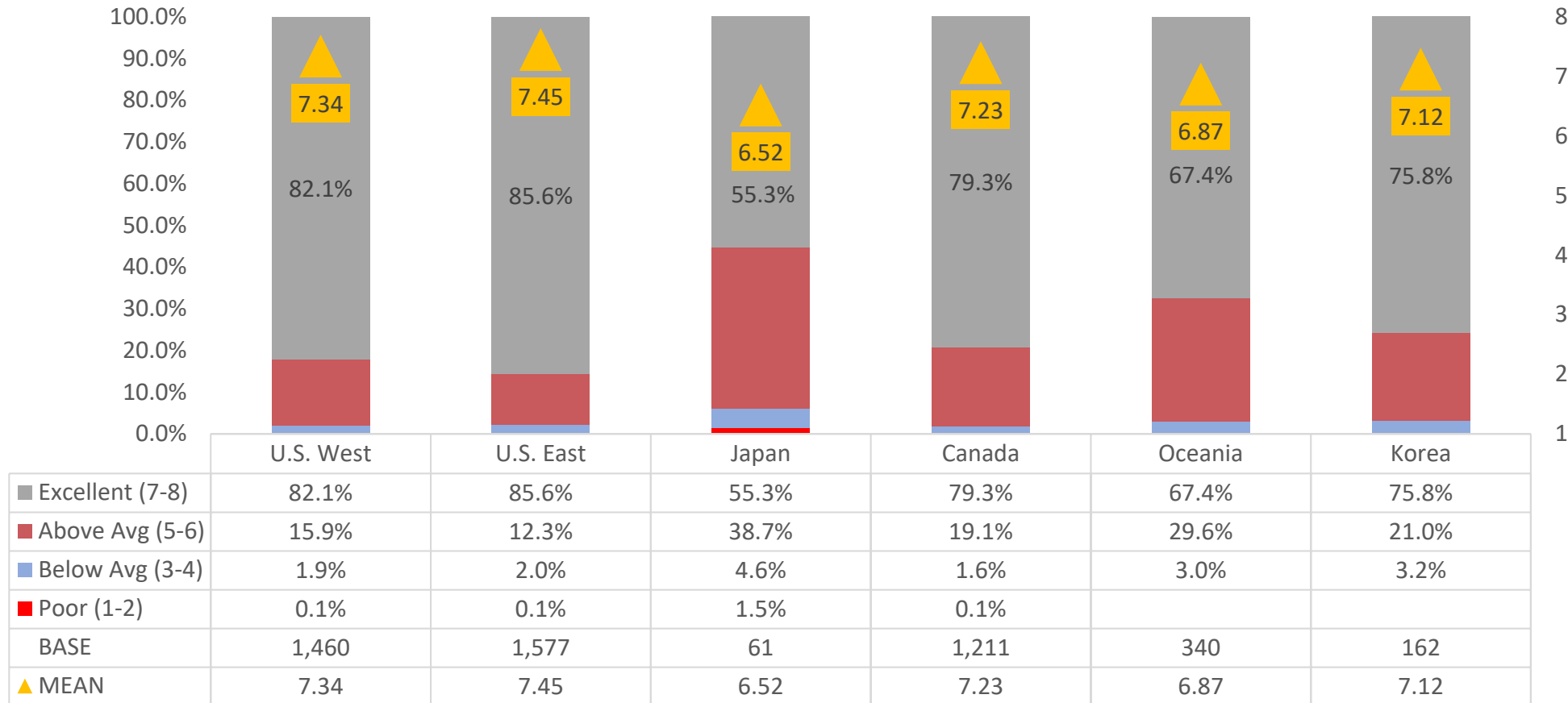
# OFFERING A VARIETY OF EXPERIENCES

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



# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

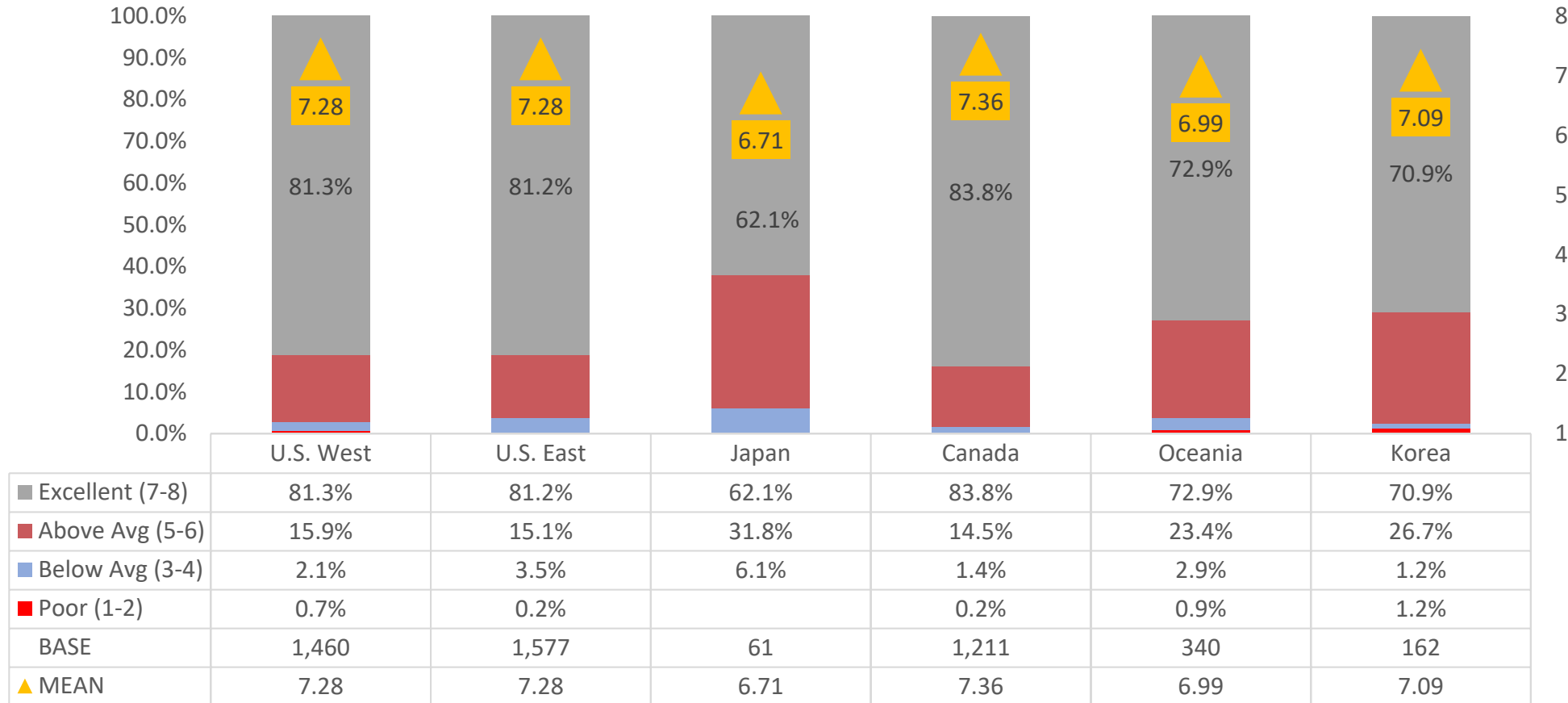
8-pt Rating Scale  
8=Excellent/ 1=Poor





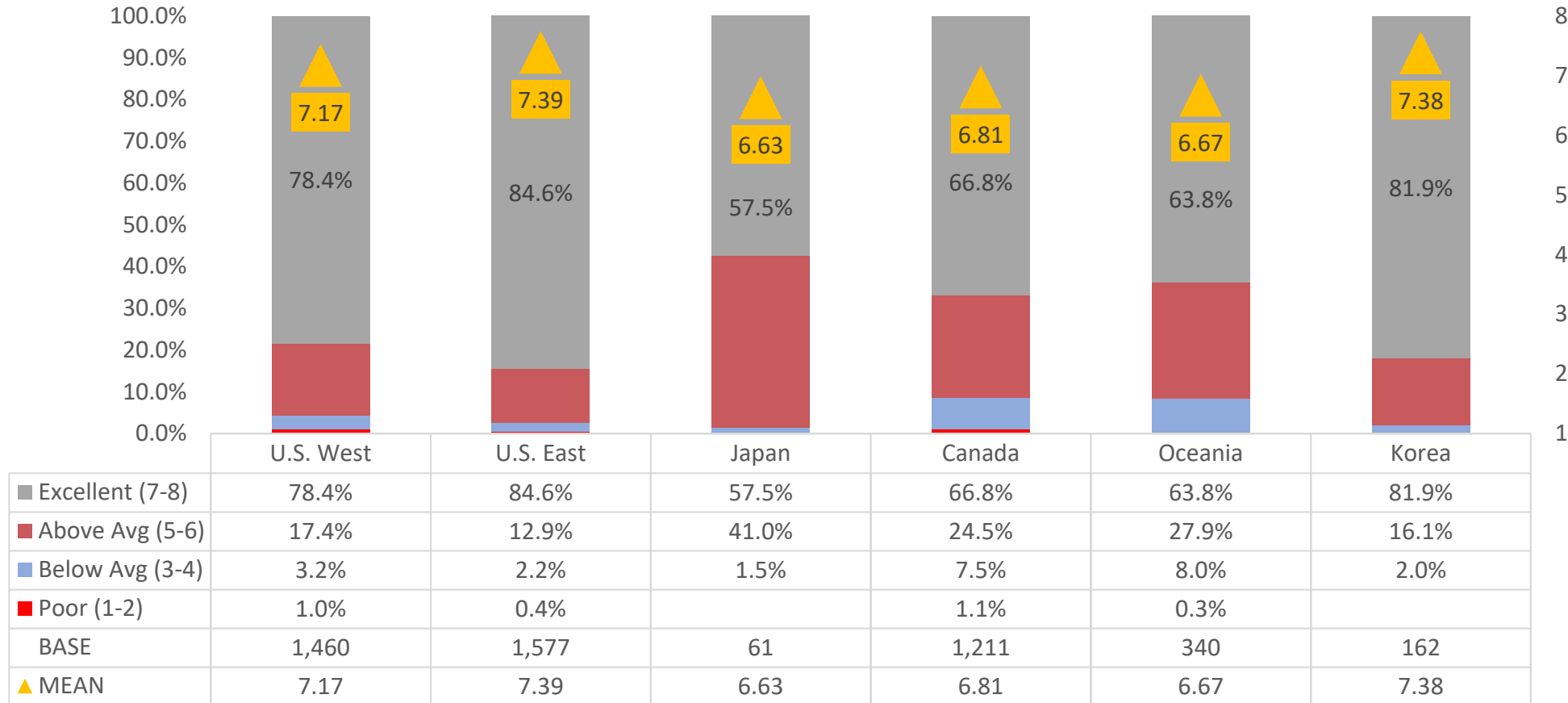
# SAFE AND SECURE DESTINATION

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



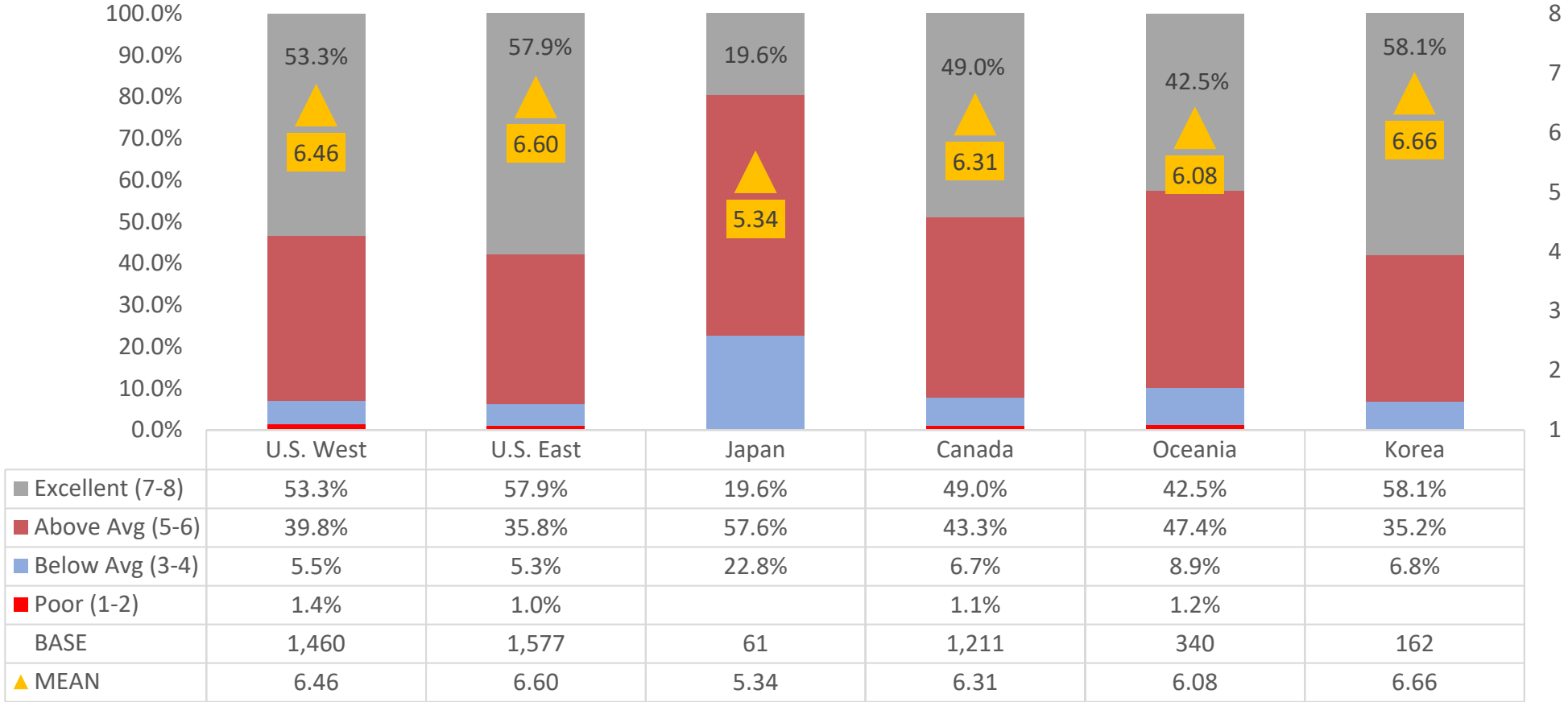
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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
<b>TOTAL</b>	97.6%	98.0%	89.2%	98.6%	93.1%	98.8%
<b>On own (self guided)</b>	85.3%	83.1%	66.9%	83.5%	54.7%	68.3%
<b>Helicopter/ airplane</b>	2.9%	6.8%	0.0%	6.5%	2.7%	13.8%
<b>Boat/ submarine/ whale</b>	21.1%	29.4%	2.3%	24.0%	21.2%	36.9%
<b>Visit towns/communities</b>	55.8%	56.0%	30.0%	59.8%	28.8%	45.0%
<b>Limo/ van/ bus tour</b>	7.4%	13.2%	6.9%	10.4%	24.7%	7.6%
<b>Scenic views/ natural landmark</b>	59.2%	68.1%	31.4%	65.9%	48.0%	58.5%
<b>Movie/ TV/ film location</b>	4.9%	7.5%	3.8%	5.9%	8.9%	26.4%

# ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	97.4%	96.7%	85.4%	98.0%	93.9%	96.4%
<b>Beach/ sunbathing</b>	87.5%	83.5%	63.1%	88.5%	76.6%	70.4%
<b>Bodyboarding</b>	11.2%	6.2%	0.0%	14.5%	3.8%	6.2%
<b>Standup paddle board</b>	5.7%	4.3%	2.3%	5.8%	7.0%	7.7%
<b>Surfing</b>	6.2%	5.9%	0.0%	9.1%	7.3%	18.0%
<b>Canoeing/ kayak</b>	6.0%	4.8%	0.0%	5.8%	2.4%	7.7%
<b>Swim in the ocean</b>	66.0%	61.6%	22.3%	75.5%	60.2%	52.6%
<b>Snorkeling</b>	40.7%	36.1%	5.4%	51.0%	23.4%	44.9%
<b>Freediving</b>	1.3%	1.5%	0.0%	0.8%	0.9%	3.5%
<b>Windsurf/ Kitesurf</b>	0.1%	0.1%	0.0%	0.4%	0.3%	0.0%
<b>Jet ski/ Parasail</b>	1.2%	1.7%	0.0%	0.7%	1.1%	2.9%
<b>Scuba diving</b>	2.2%	2.2%	1.5%	2.7%	1.2%	1.2%
<b>Fishing</b>	1.8%	2.5%	0.0%	1.9%	0.3%	2.6%
<b>Golf</b>	5.8%	5.8%	6.2%	10.0%	0.9%	1.4%

# ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	97.4%	96.7%	85.4%	98.0%	93.9%	96.4%
<b>Run/ Jog/ Fitness walk</b>	29.9%	27.0%	30.1%	31.6%	22.9%	20.4%
<b>Cycling</b>	3.5%	3.4%	2.3%	5.5%	2.1%	0.6%
<b>Spa</b>	9.9%	9.9%	9.2%	4.6%	4.6%	5.5%
<b>Hiking</b>	42.6%	48.3%	14.6%	48.3%	20.4%	26.5%
<b>Backpack/ camp</b>	1.7%	1.3%	0.0%	1.3%	0.3%	4.0%
<b>Agritourism</b>	14.0%	15.3%	3.1%	10.3%	6.5%	17.6%
<b>Sport event/ tournament</b>	2.1%	3.3%	1.5%	3.0%	2.3%	0.6%
<b>Park/ botanical garden</b>	35.1%	42.4%	27.7%	41.2%	27.5%	23.5%
<b>Waterpark</b>	1.5%	1.5%	2.3%	1.0%	1.2%	8.9%
<b>Mountain tube/ waterfall rappel</b>	1.0%	1.8%	0.0%	1.7%	0.6%	1.2%
<b>Zip lining</b>	4.1%	4.1%	1.5%	3.1%	0.8%	1.2%
<b>Skydiving</b>	0.1%	0.6%	2.3%	0.2%	0.0%	4.3%
<b>All terrain vehicle (ATV)</b>	3.1%	4.7%	0.0%	2.9%	4.4%	14.8%
<b>Horseback riding</b>	1.4%	2.1%	0.0%	1.5%	0.3%	7.9%

# ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	99.4%	98.1%	95.4%	98.4%	98.2%	98.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	21.9%	27.3%	3.8%	20.7%	15.6%	44.9%
<b>Live music/ stage show</b>	29.3%	33.0%	20.1%	29.3%	19.0%	18.3%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.5%	7.8%	3.1%	6.1%	7.4%	7.0%
<b>Fine dining</b>	49.7%	49.5%	35.4%	41.9%	30.6%	54.9%
<b>Family restaurant</b>	62.1%	60.9%	23.1%	61.5%	66.4%	33.5%
<b>Fast food</b>	34.8%	35.0%	45.3%	44.4%	48.4%	59.5%
<b>Food truck</b>	42.0%	40.5%	18.5%	43.2%	31.4%	51.5%
<b>Café/ coffee house</b>	52.5%	49.0%	46.2%	54.4%	58.3%	67.7%
<b>Ethnic dining</b>	27.8%	31.1%	9.3%	21.2%	14.2%	22.5%
<b>Farm to table cuisine</b>	18.5%	17.3%	15.4%	11.9%	5.0%	0.6%
<b>Prepared own meal</b>	49.0%	39.1%	30.1%	63.7%	24.2%	6.5%



# ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	97.6%	97.0%	100.0%	97.6%	97.0%	95.8%
<b>Mall/ department store</b>	45.5%	44.4%	72.3%	57.7%	72.3%	72.2%
<b>Designer boutique</b>	17.9%	17.6%	14.6%	18.4%	17.4%	5.9%
<b>Hotel/ resort store</b>	35.7%	40.9%	34.6%	32.6%	29.8%	37.0%
<b>Swap meet/ flea market</b>	17.0%	14.2%	5.4%	13.5%	8.4%	4.3%
<b>Discount/ outlet store</b>	14.3%	17.2%	25.4%	19.9%	40.6%	60.0%
<b>Supermarket</b>	66.1%	54.9%	57.7%	69.3%	44.6%	40.7%
<b>Farmer's market</b>	34.0%	29.8%	17.7%	42.9%	15.8%	12.7%
<b>Convenience store</b>	50.8%	52.3%	50.0%	55.4%	62.9%	49.9%
<b>Duty free store</b>	3.8%	5.3%	6.2%	6.1%	7.0%	39.7%
<b>Hawai'i made products</b>	48.6%	49.2%	23.1%	45.9%	34.3%	23.3%
<b>Local shop/ artisan</b>	61.4%	60.1%	13.8%	61.1%	38.8%	23.4%

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	69.1%	79.3%	47.7%	73.0%	69.4%	52.4%
<b>Historic military site</b>	18.4%	31.6%	4.6%	18.1%	35.5%	11.9%
<b>Historic Hawaiian site</b>	30.5%	35.4%	20.0%	32.3%	27.6%	9.6%
<b>Other historical site</b>	13.2%	15.7%	8.5%	13.1%	11.5%	16.1%
<b>Art museum</b>	3.8%	2.9%	1.5%	3.2%	3.8%	5.5%
<b>Art gallery/ exhibition</b>	11.4%	10.1%	0.0%	11.8%	7.5%	1.8%
<b>Luau/ Polynesian show/ hula show</b>	25.5%	39.7%	11.5%	29.0%	23.0%	12.7%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	5.1%	5.9%	4.6%	3.0%	2.9%	1.2%
<b>Play/ concert/ theatre</b>	3.4%	2.8%	1.5%	3.1%	2.4%	4.7%
<b>Art/ craft fair</b>	13.6%	10.3%	4.6%	12.7%	4.1%	2.3%
<b>Festival /event</b>	4.2%	5.5%	9.3%	3.8%	4.0%	4.9%

# ACTIVITIES - TRANSPORTATION

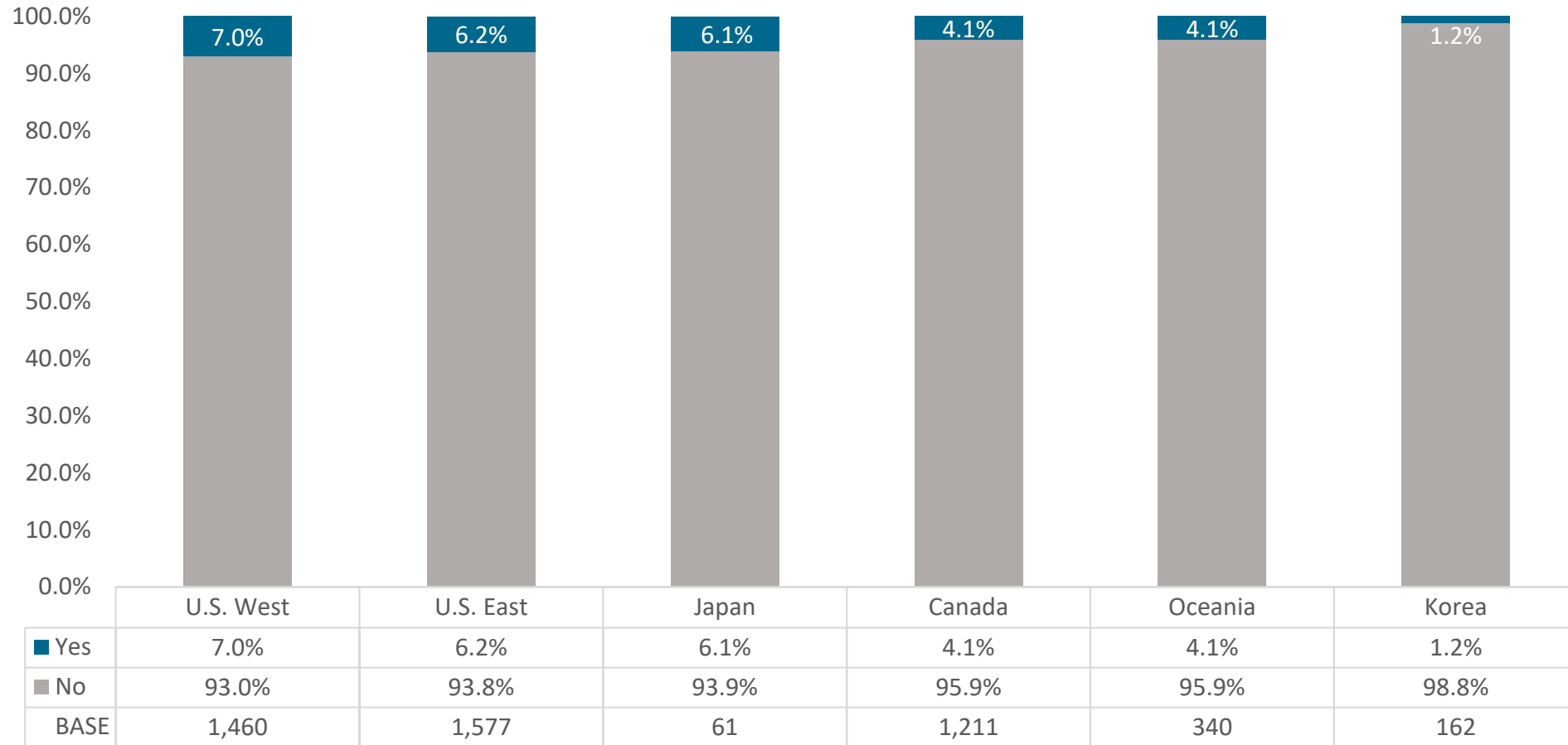
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>TOTAL</b>	93.5%	93.4%	94.6%	94.9%	97.8%	94.9%
<b>Airport shuttle</b>	14.6%	14.4%	14.6%	15.3%	29.1%	14.6%
<b>Trolley</b>	3.2%	4.0%	21.5%	4.6%	11.6%	17.4%
<b>Public bus</b>	4.1%	5.4%	26.2%	9.4%	24.7%	14.1%
<b>Tour bus/ tour van</b>	5.8%	14.4%	10.7%	11.7%	24.5%	23.3%
<b>Taxi/ limo</b>	8.5%	9.7%	36.2%	14.8%	36.6%	17.3%
<b>Rental car</b>	73.7%	70.3%	30.7%	72.4%	32.2%	55.3%
<b>Ride share</b>	17.7%	21.0%	26.1%	16.7%	36.7%	18.9%
<b>Car share (i.e. Hui, Turo)</b>	6.3%	5.3%	1.5%	5.3%	3.6%	2.0%
<b>Bicycle rental</b>	2.7%	2.1%	2.3%	2.7%	1.2%	3.2%

# ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	33.5%	29.9%	25.4%	23.0%	14.2%	27.9%
Visit friends/ family	32.0%	27.8%	25.4%	20.7%	12.1%	24.4%
Volunteer non profit	2.6%	3.0%	0.0%	3.8%	2.6%	3.5%

# Section 3 – Travelers with Disabilities

# DISABLED TRAVELER - REQUIRED ASSISTANCE

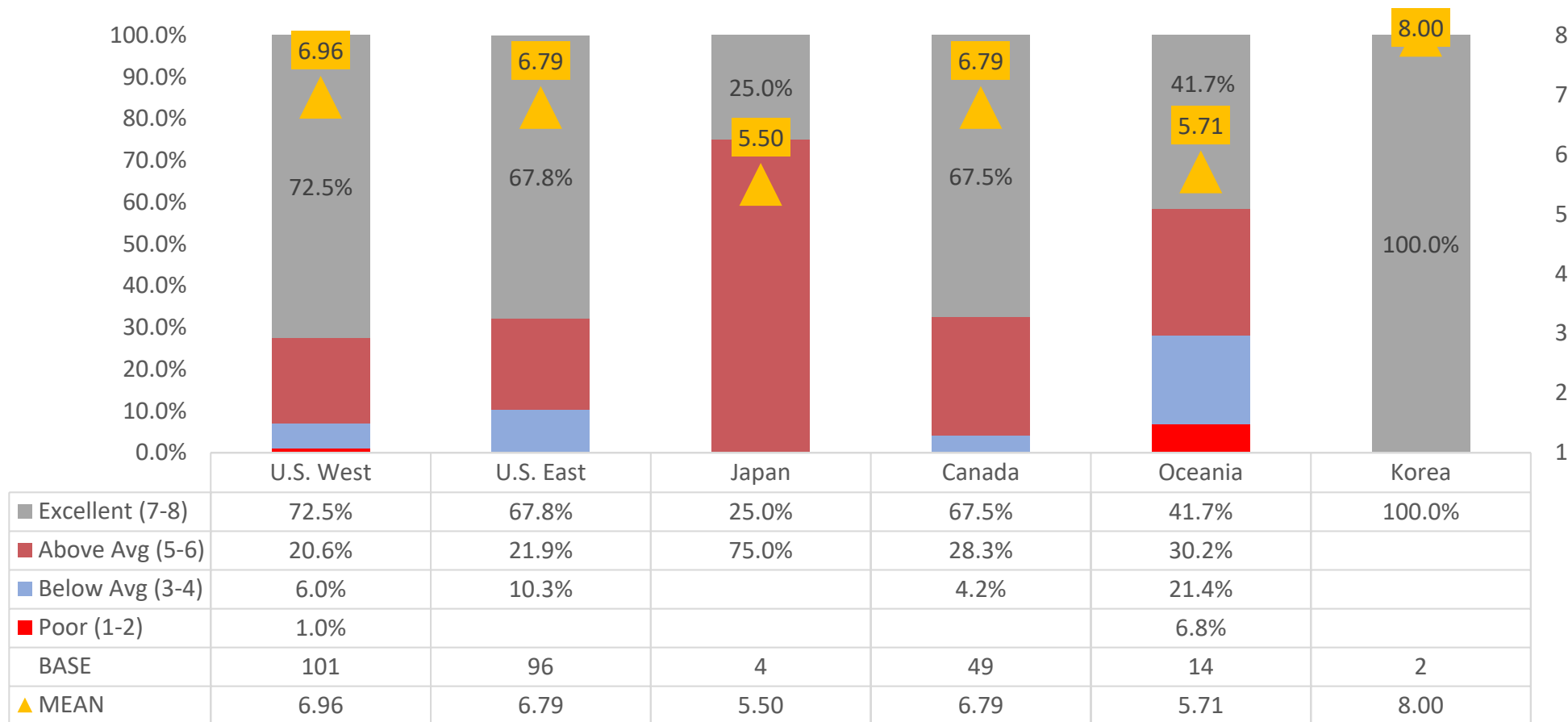


# DISABLED TRAVELER - REQUIRED ASSISTANCE (CONT.)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Mobility aid	67.3%	70.2%	50.0%	67.3%	64.1%	0.0%
Personal assistance	30.8%	19.4%	25.0%	12.2%	13.6%	0.0%
NA No one needed assistance	6.8%	9.3%	25.0%	14.3%	6.8%	100.0%
Orientation and Mobility Assistance	5.7%	2.1%	0.0%	2.1%	22.4%	0.0%
Other	5.7%	3.1%	0.0%	2.1%	0.0%	0.0%
Lift equipped van	1.9%	3.1%	0.0%	1.9%	0.0%	0.0%
Ambulance/ Hospital/ Medical visit	1.0%	0.0%	0.0%	2.1%	0.0%	0.0%
Respiratory equipment	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%
BASE	103	98	4	49	14	2

# OVERALL ACCESSIBILITY - AIRPORTS

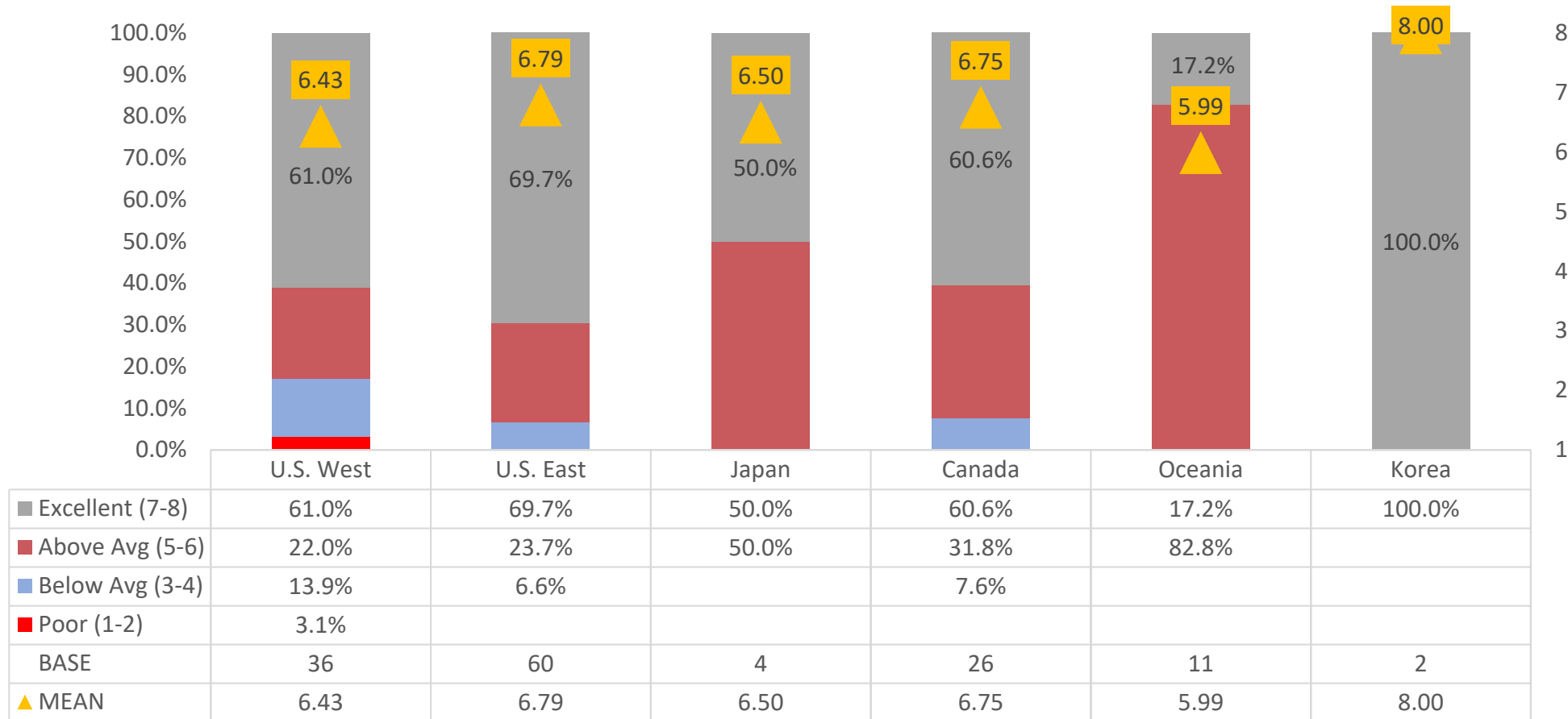
8-pt Rating Scale  
8=Excellent/ 1=Poor





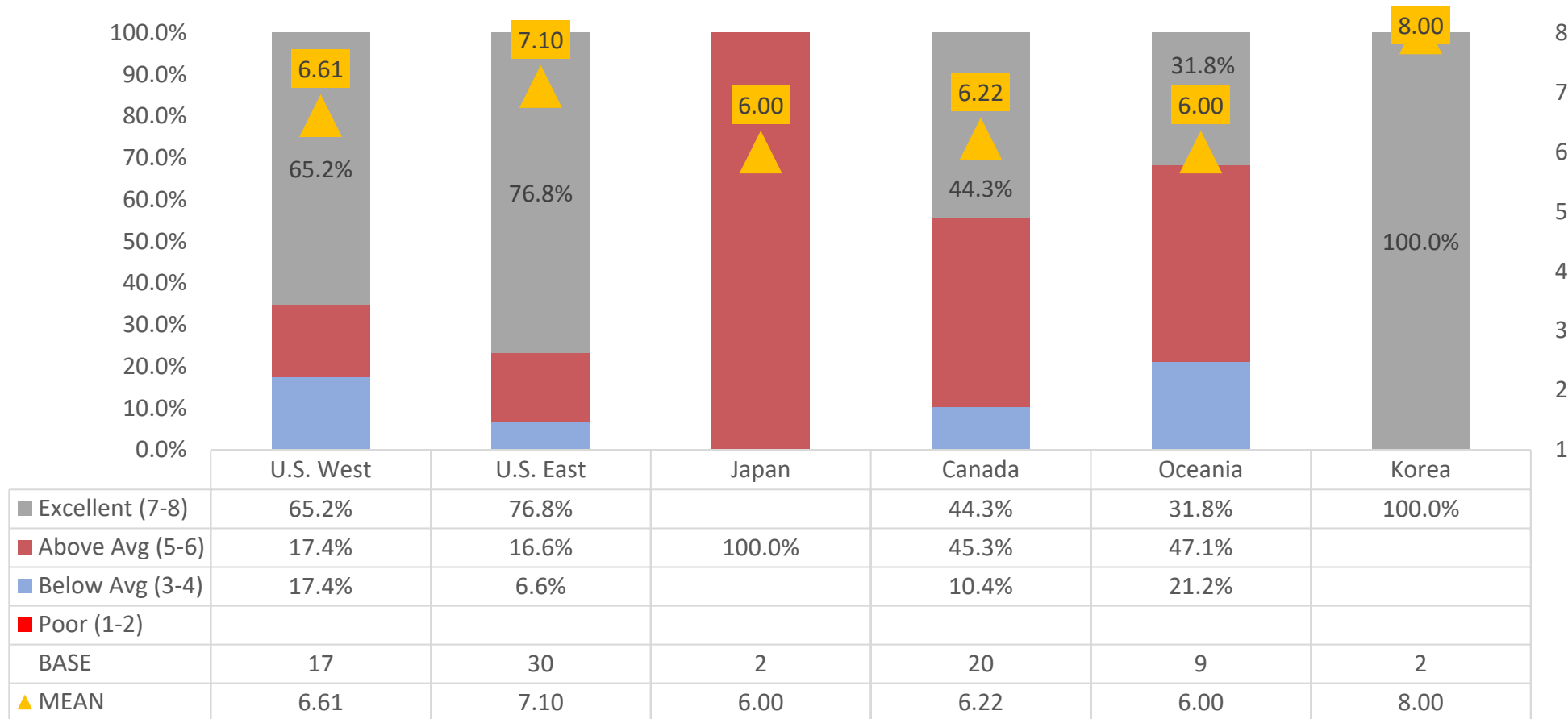
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



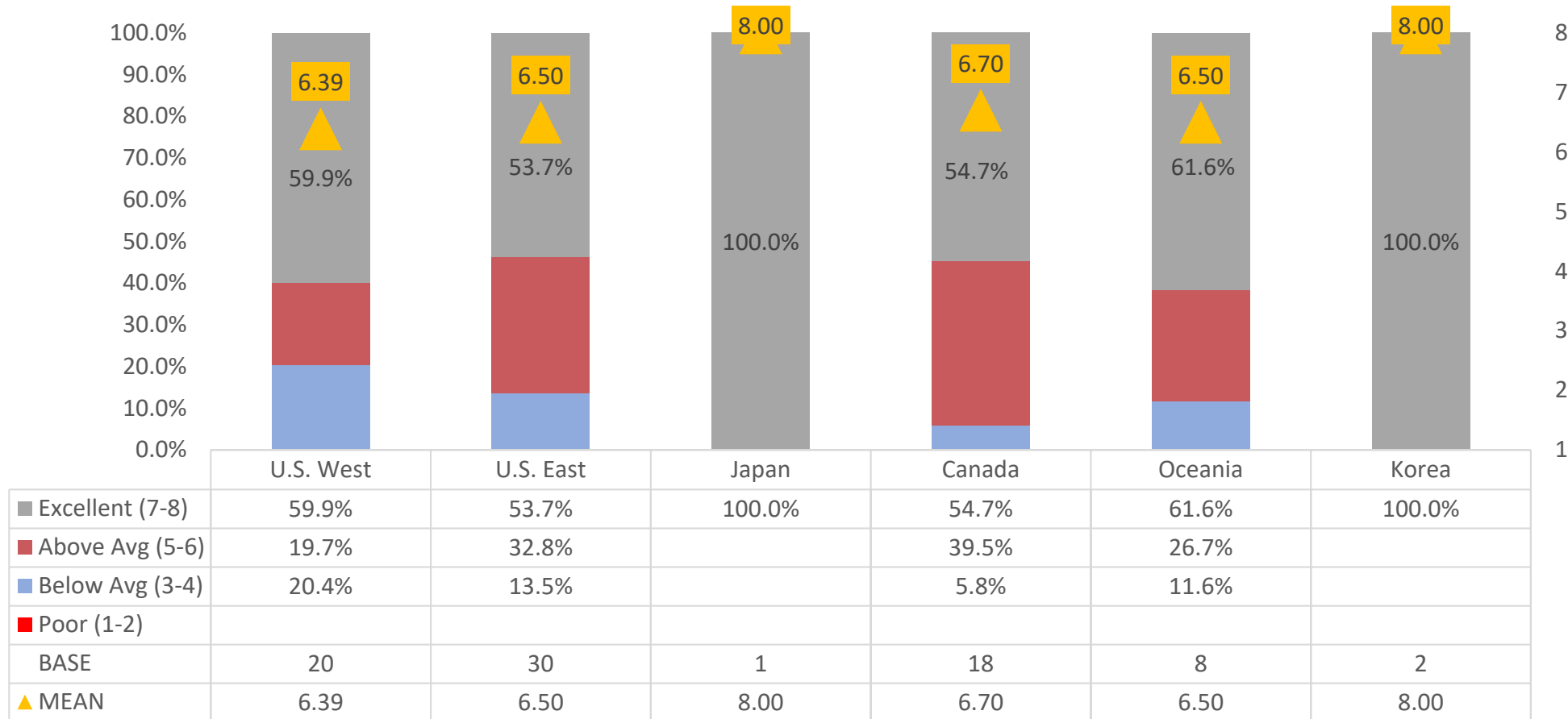
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



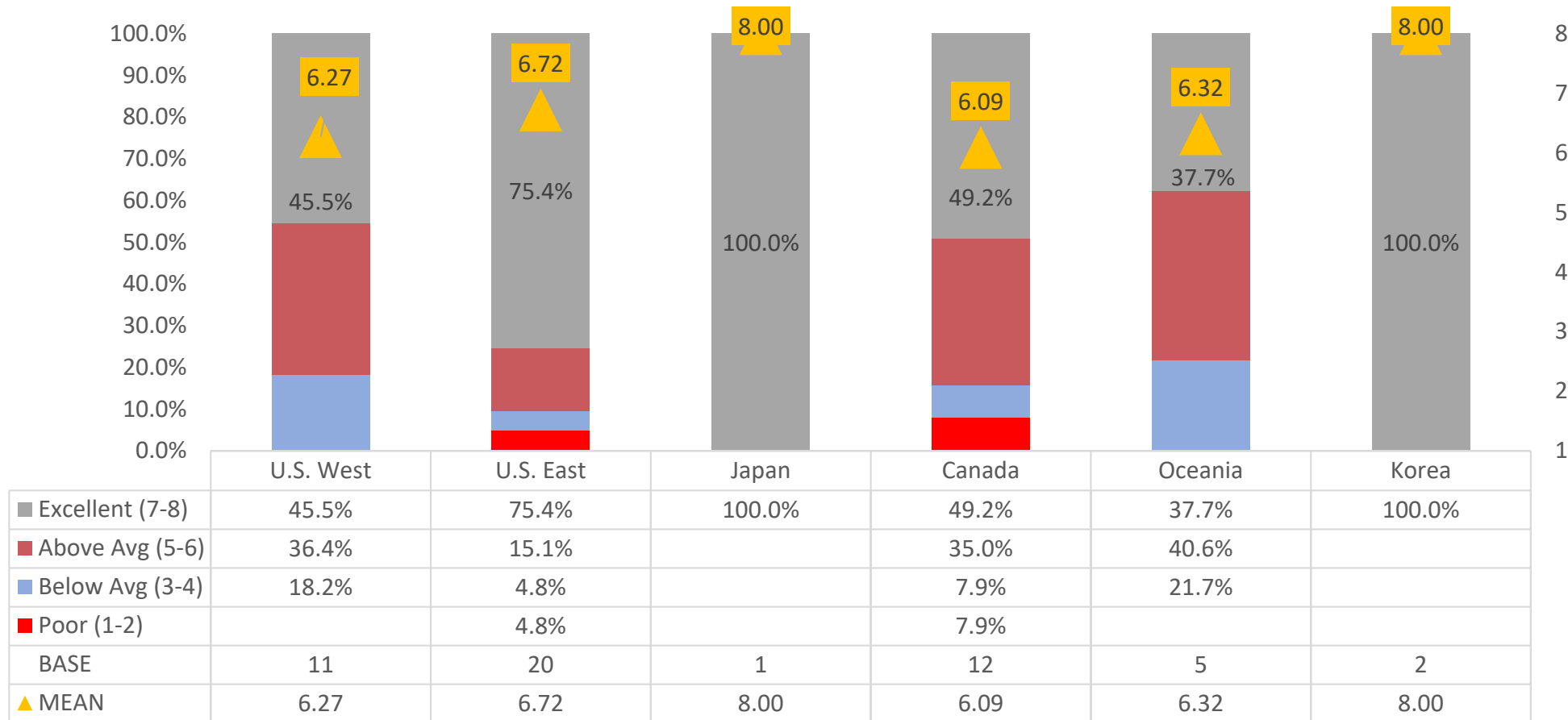
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



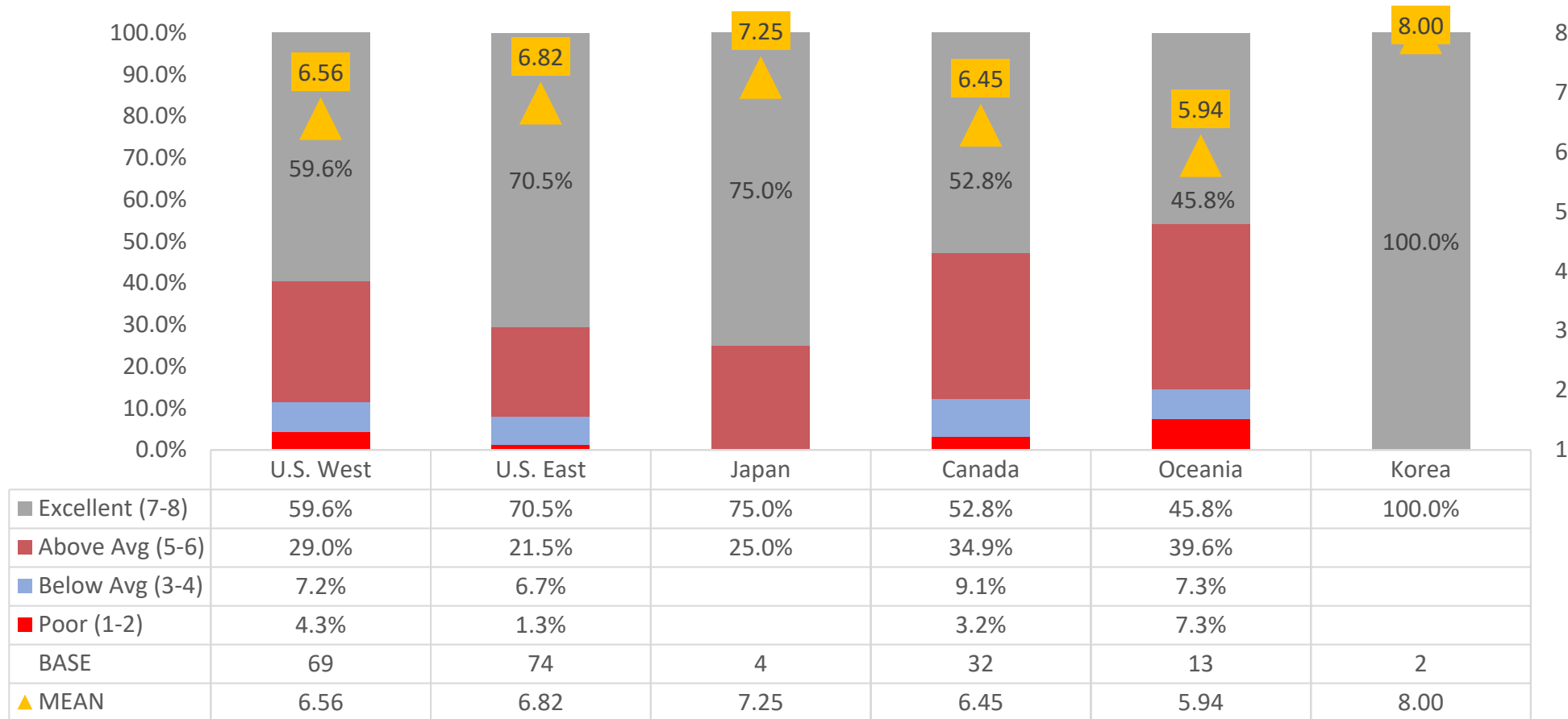
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



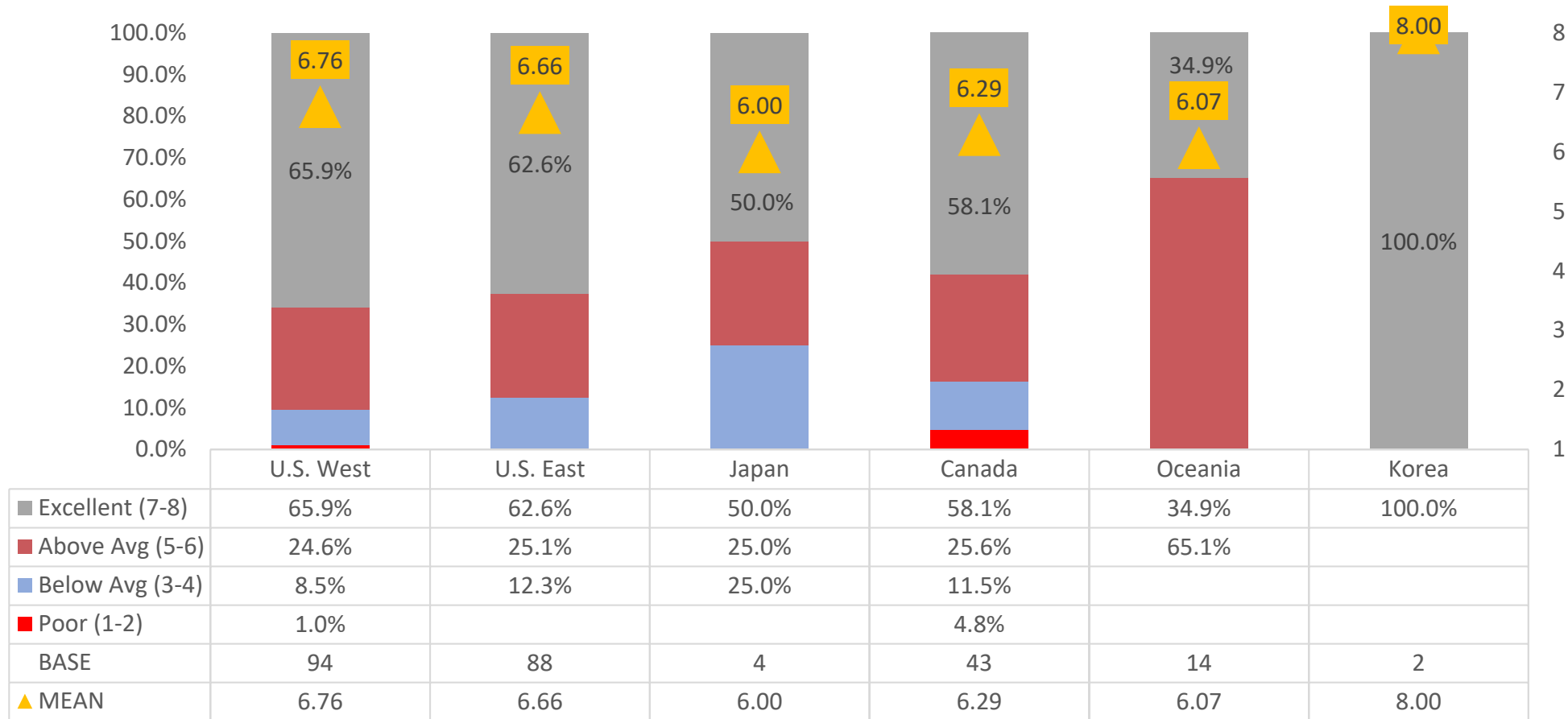
# OVERALL ACCESSIBILITY - HOTELS

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



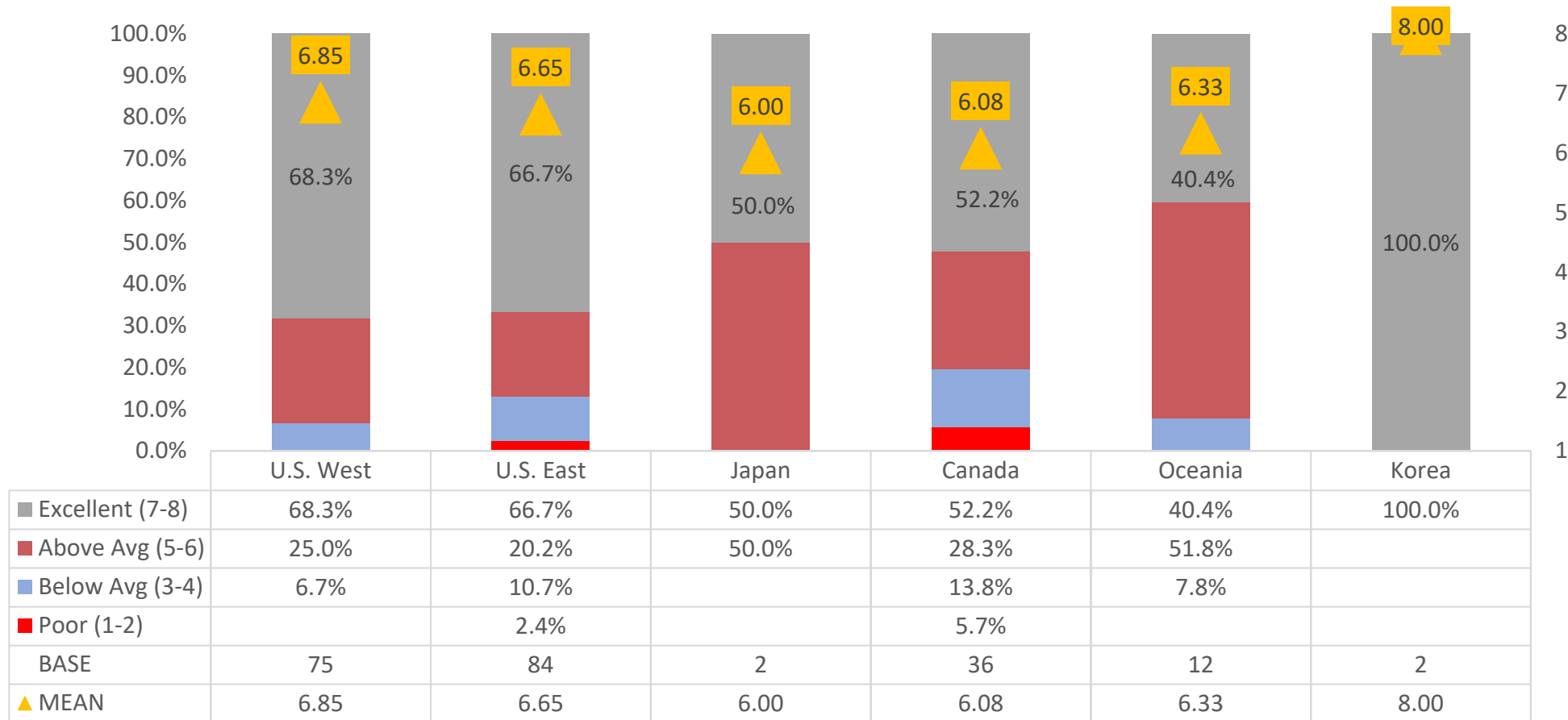
# OVERALL ACCESSIBILITY - RESTAURANTS

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



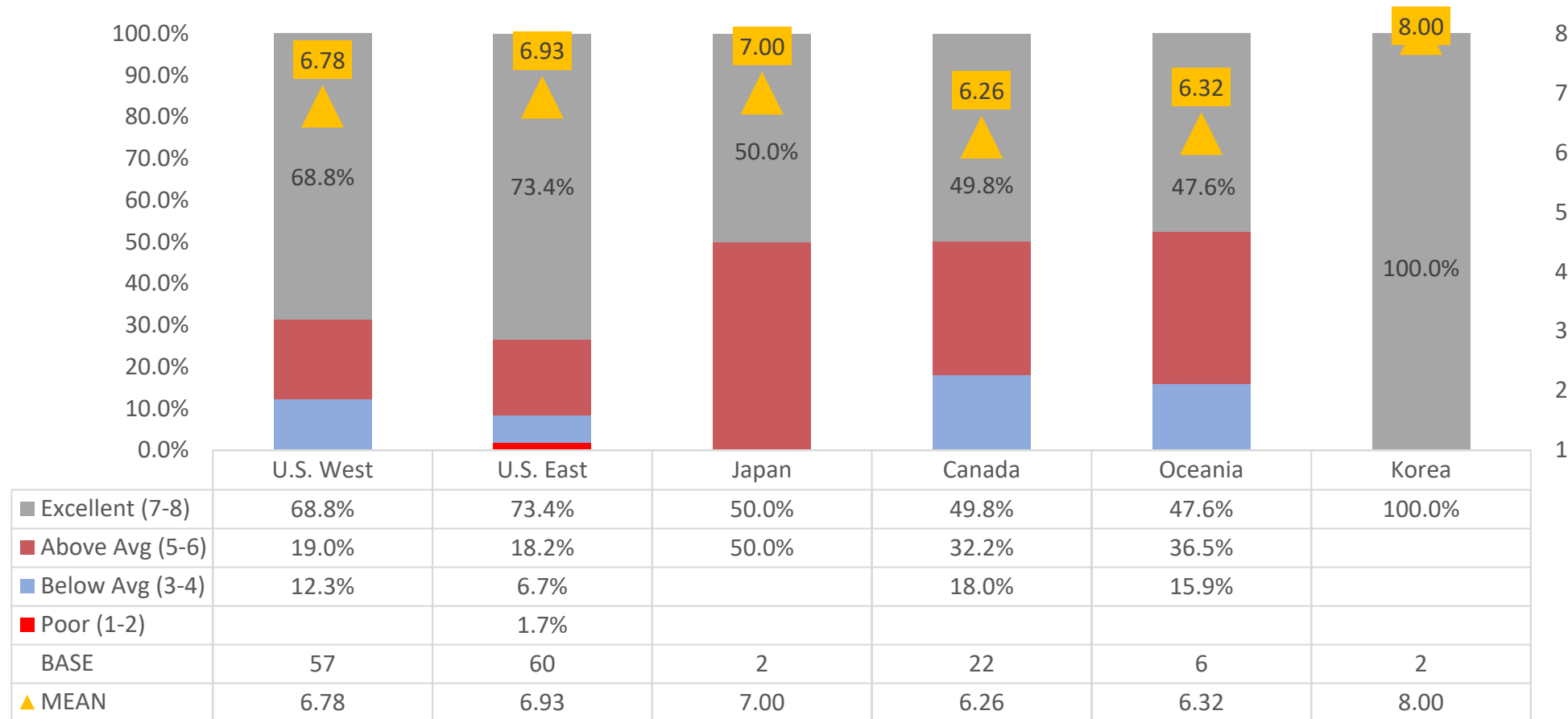
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

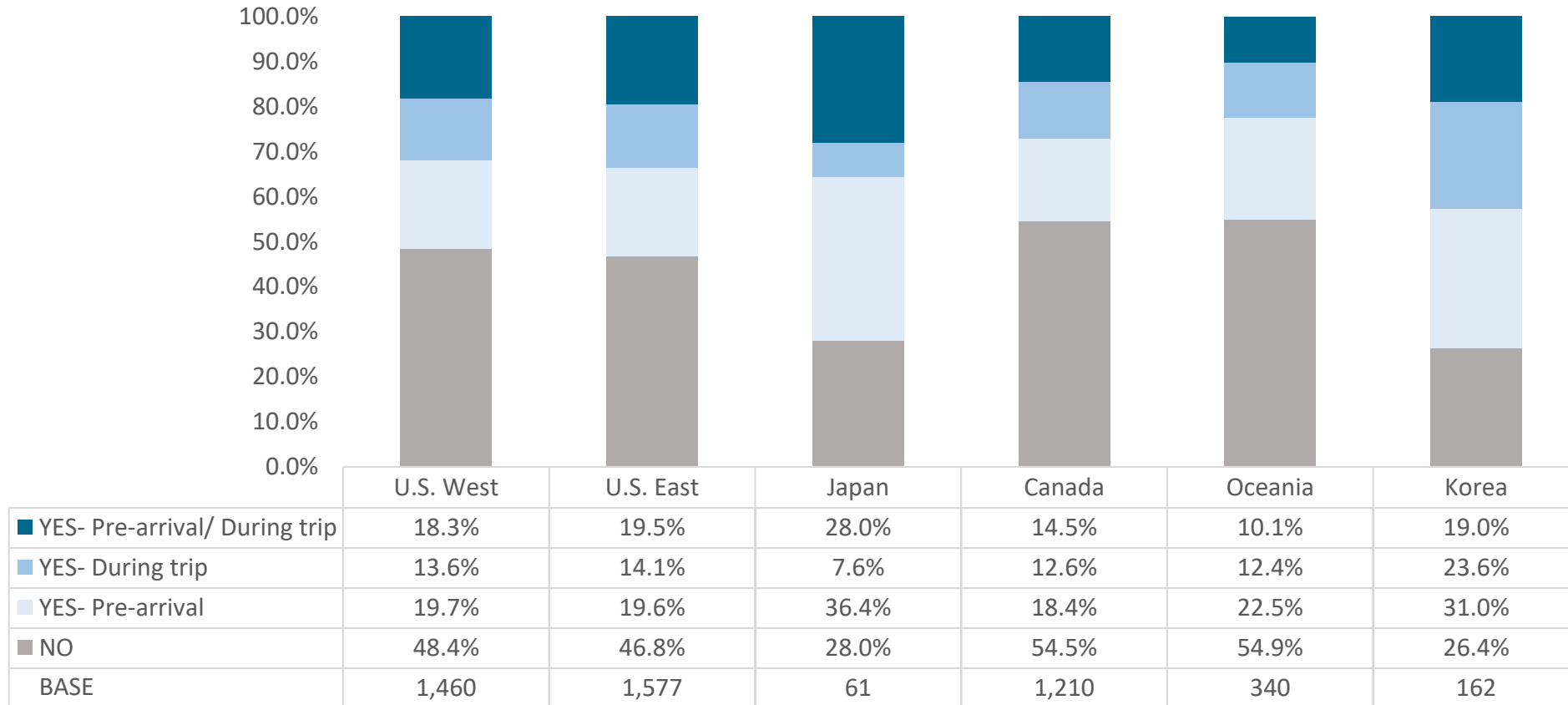
8-pt Rating Scale  
8=Excellent/ 1=Poor



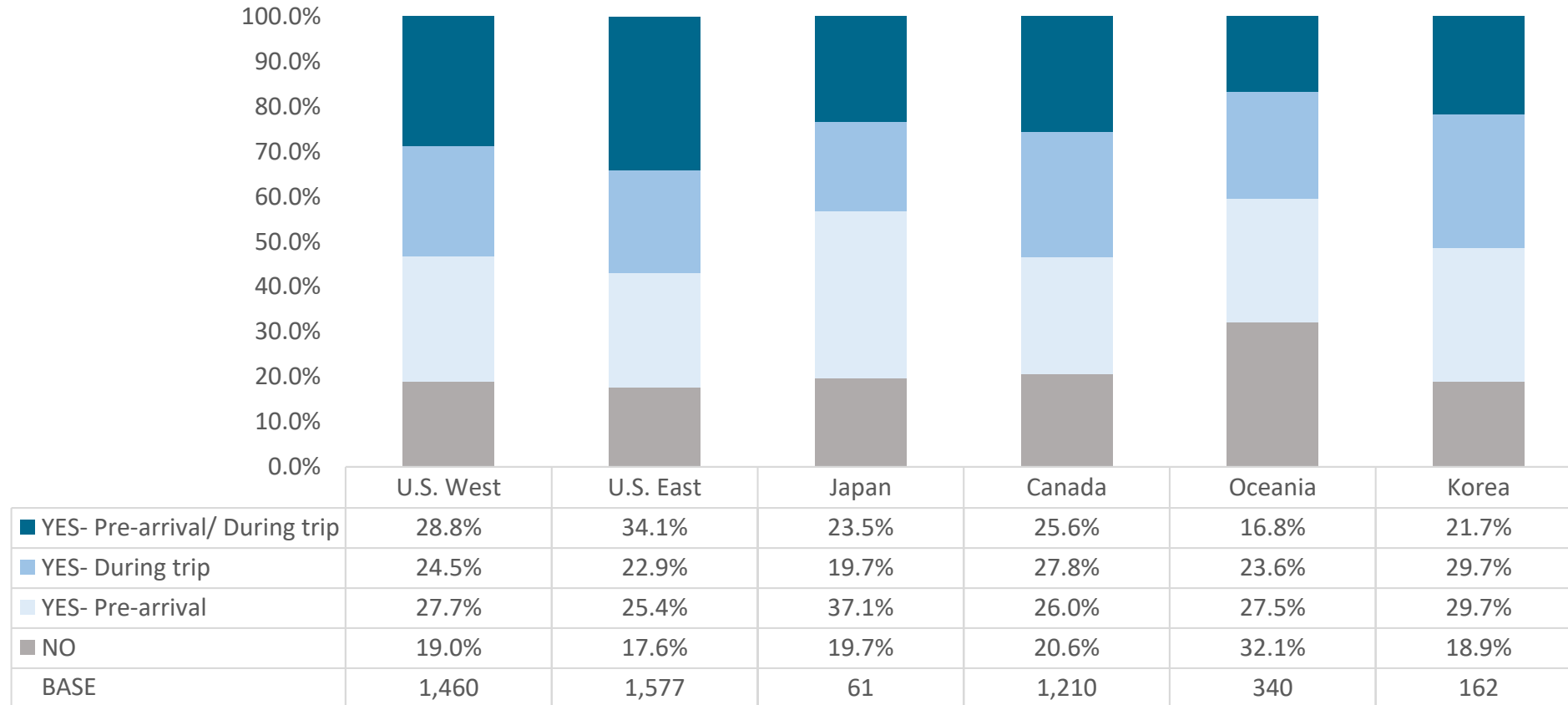


# Section 4 – Alternative Messaging

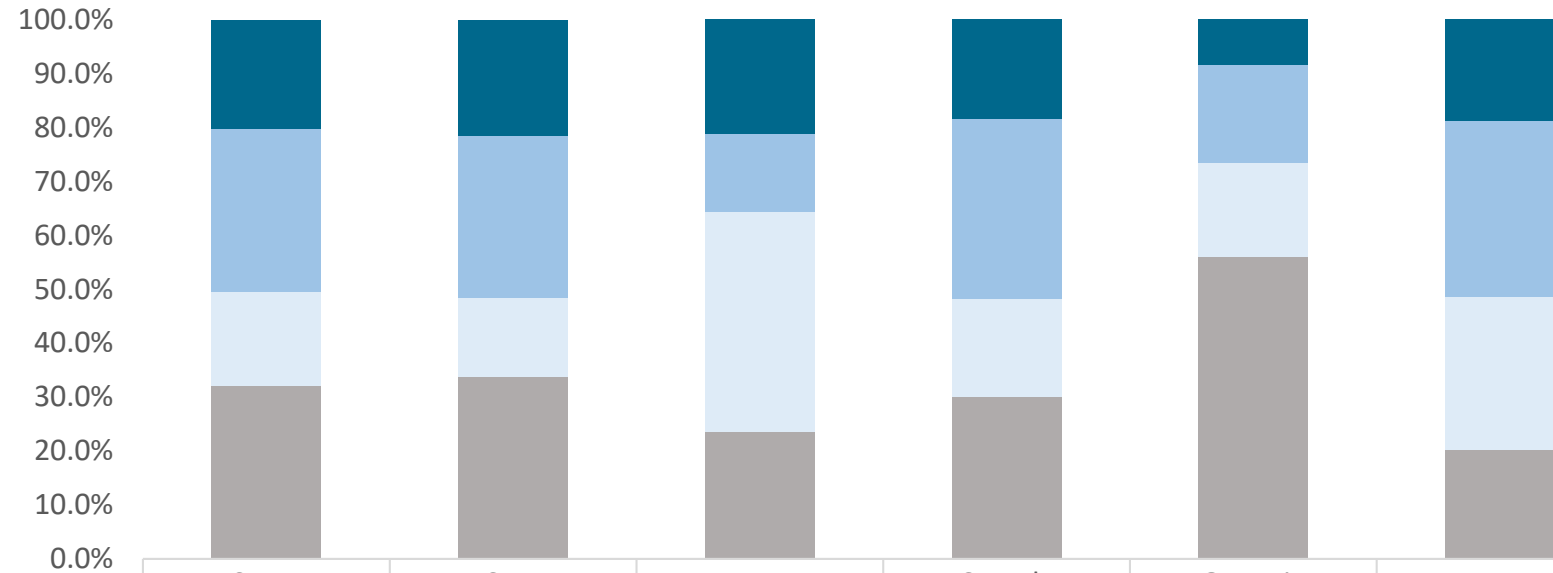
# SAFE AND RESPONSIBLE TRAVEL



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

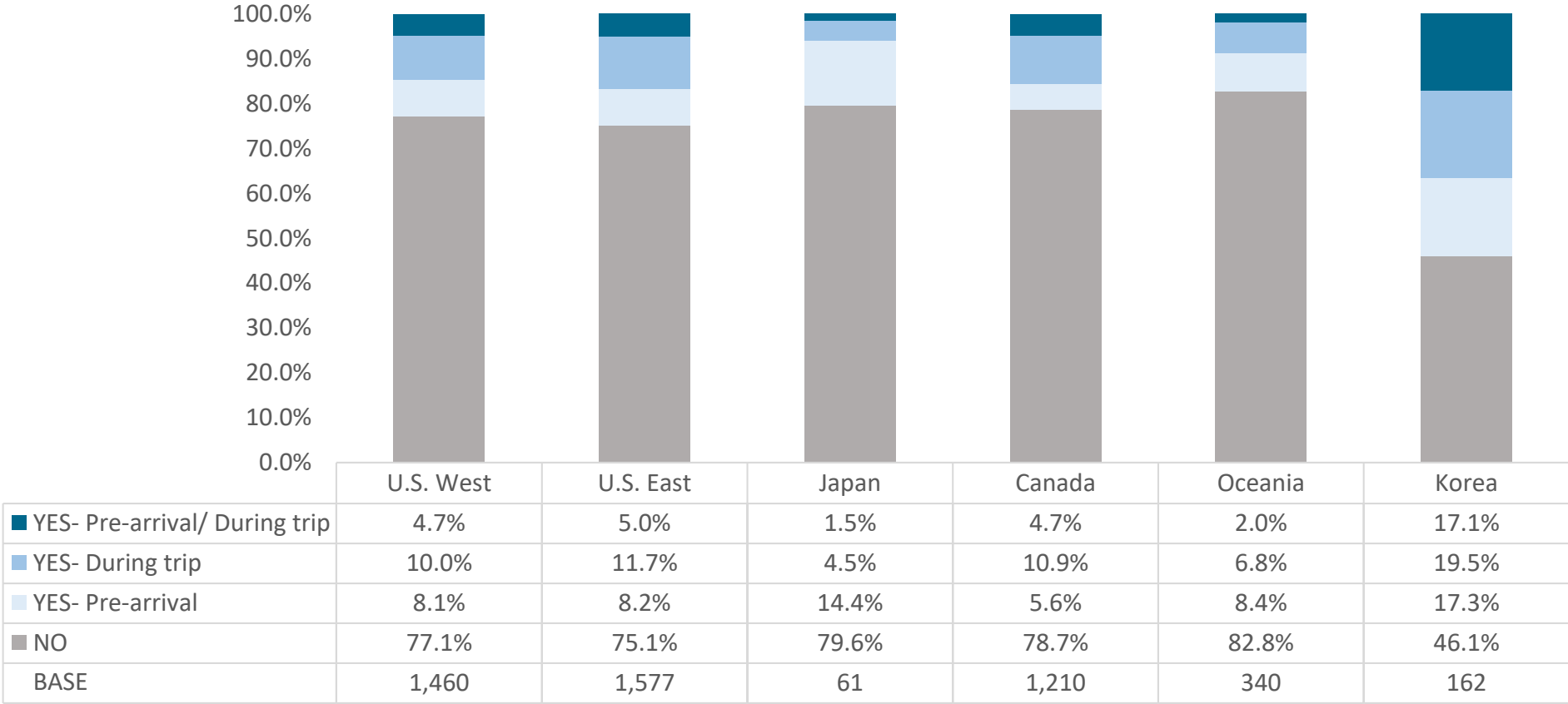


# OCEAN AND HIKING SAFETY

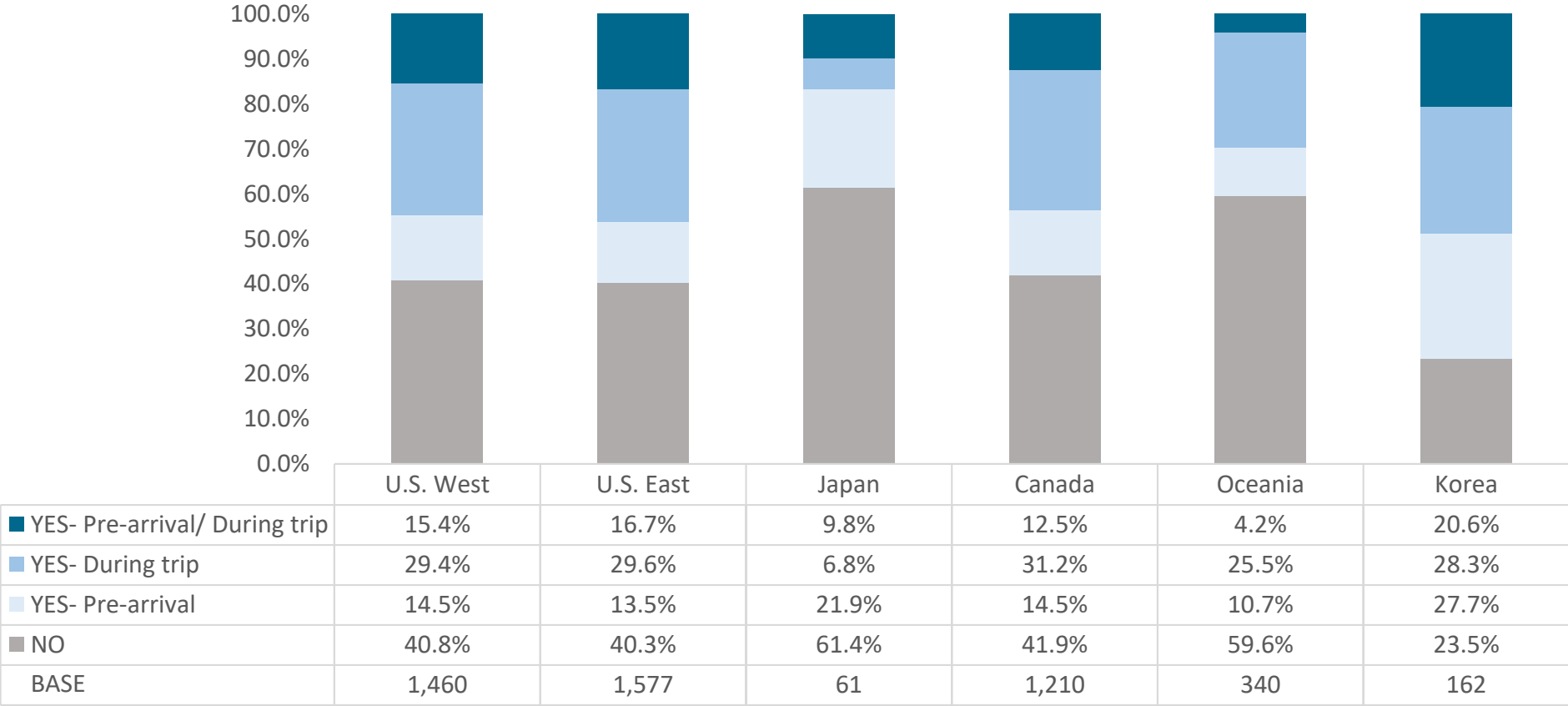


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
YES- Pre-arrival/ During trip	20.2%	21.5%	21.2%	18.5%	8.5%	18.8%
YES- During trip	30.3%	30.1%	14.4%	33.2%	18.1%	32.5%
YES- Pre-arrival	17.4%	14.5%	40.9%	18.2%	17.3%	28.4%
NO	32.1%	33.9%	23.5%	30.1%	56.1%	20.3%
BASE	1,460	1,577	61	1,210	340	162

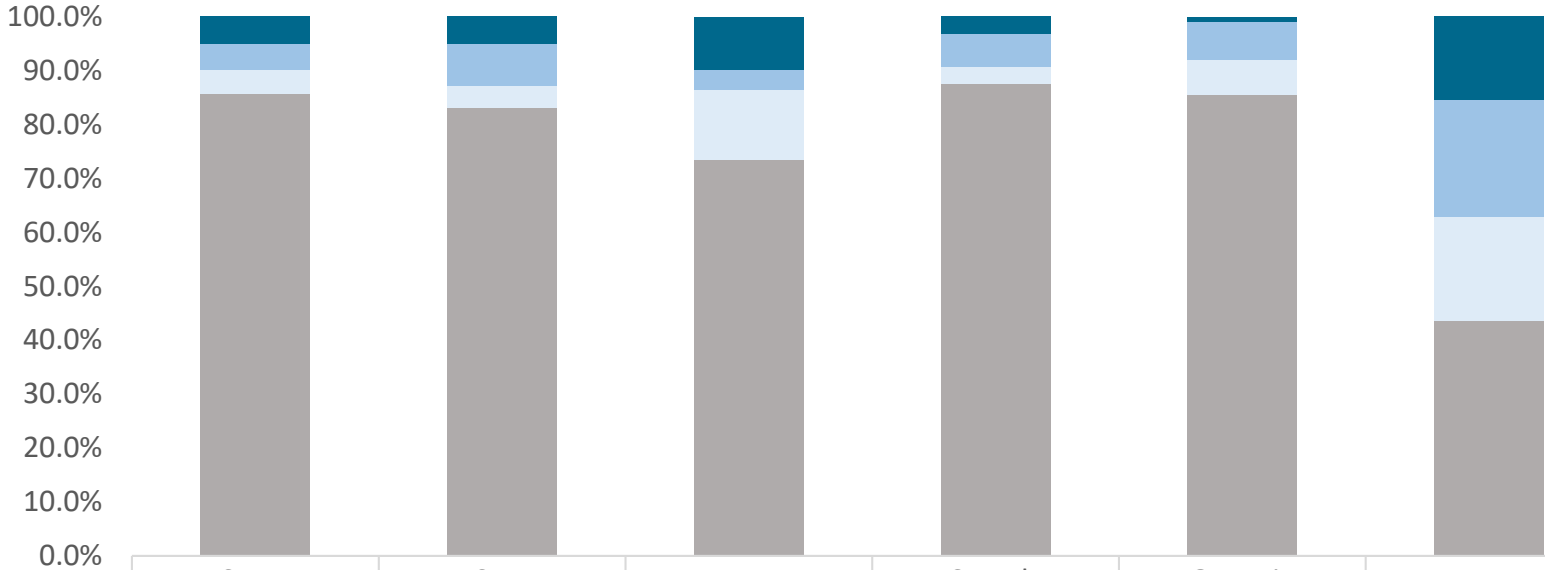
# VOLUNTEER/GIVE-BACK OPPORTUNITIES



# SUPPORT LOCAL/ SHOP LOCAL



# MALAMA HAWAI'I



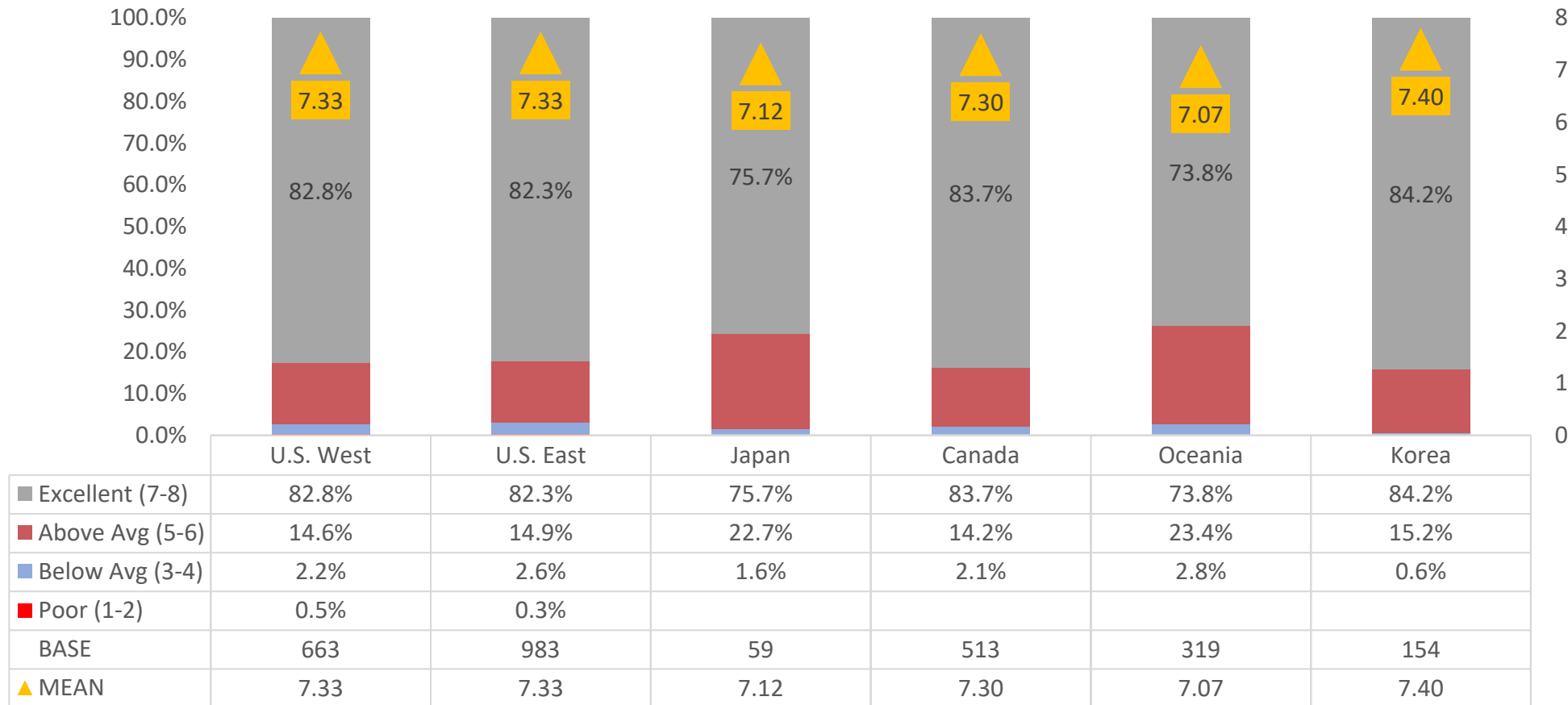
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
YES- Pre-arrival/ During trip	5.0%	5.1%	9.8%	3.3%	0.9%	15.4%
YES- During trip	4.9%	7.7%	3.8%	6.1%	7.1%	21.7%
YES- Pre-arrival	4.3%	4.2%	12.9%	3.1%	6.5%	19.4%
NO	85.8%	83.0%	73.5%	87.5%	85.5%	43.5%
BASE	1,460	1,577	61	1,210	340	162

# Section 5 – O'AHU



# SATISFACTION - O'AHU (1/3)

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

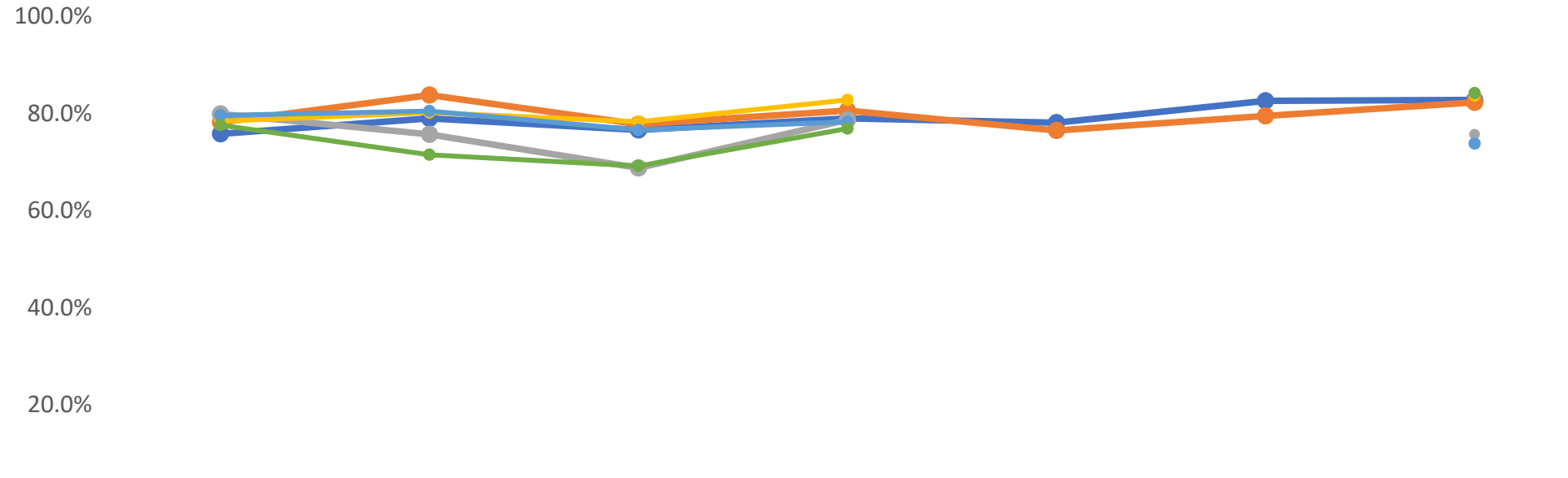


# SATISFACTION - O'AHU (2/3)

- **Islands visited:** Visitors from the following markets whose trip consisted of staying on just O'ahu gave the island a higher mean satisfaction score than those who also visited one of the Neighbor Islands during their stay: Korea, U.S. East, and U.S. West.
- **Trips to Hawai'i:** Visitors from Japan and Korea who were first-time travelers to the state gave O'ahu higher satisfaction scores than repeat visitors.
- **Gender:** Female respondents from U.S. West gave higher satisfaction scores when rating their stay on O'ahu compared to male respondents.

# SATISFACTION - O'AHU (3/3)

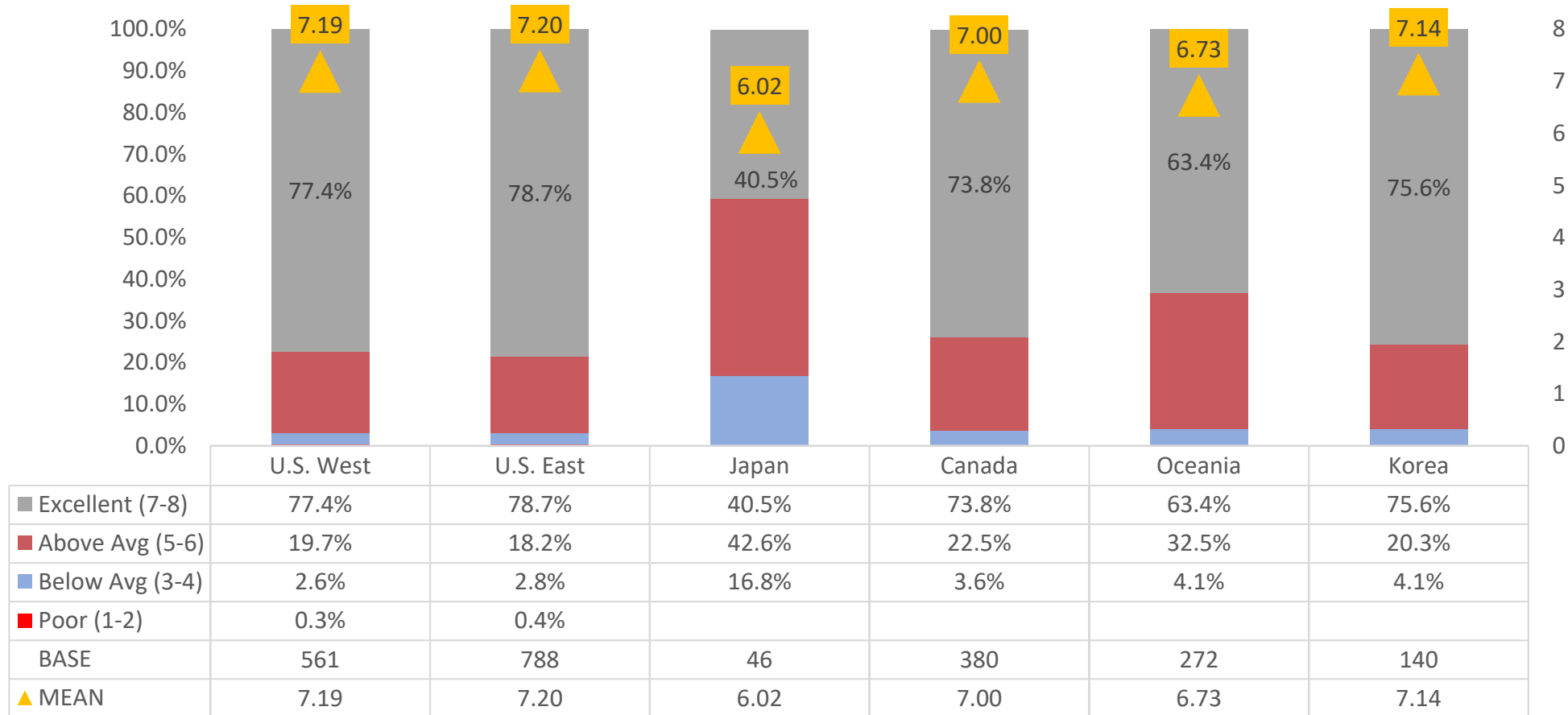
Tracking Data – Rating of “Excellent” (7-8)



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	75.8%	79.0%	76.6%	79.0%	78.1%	82.6%	82.8%
U.S. East	78.2%	83.8%	77.8%	80.6%	76.5%	79.5%	82.3%
Japan	79.9%	75.7%	68.8%	78.7%			75.7%
Canada	78.4%	80.2%	78.3%	82.8%			83.7%
Oceania	79.6%	80.5%	76.6%	78.3%			73.8%
Korea	77.6%	71.5%	69.2%	76.9%			84.2%

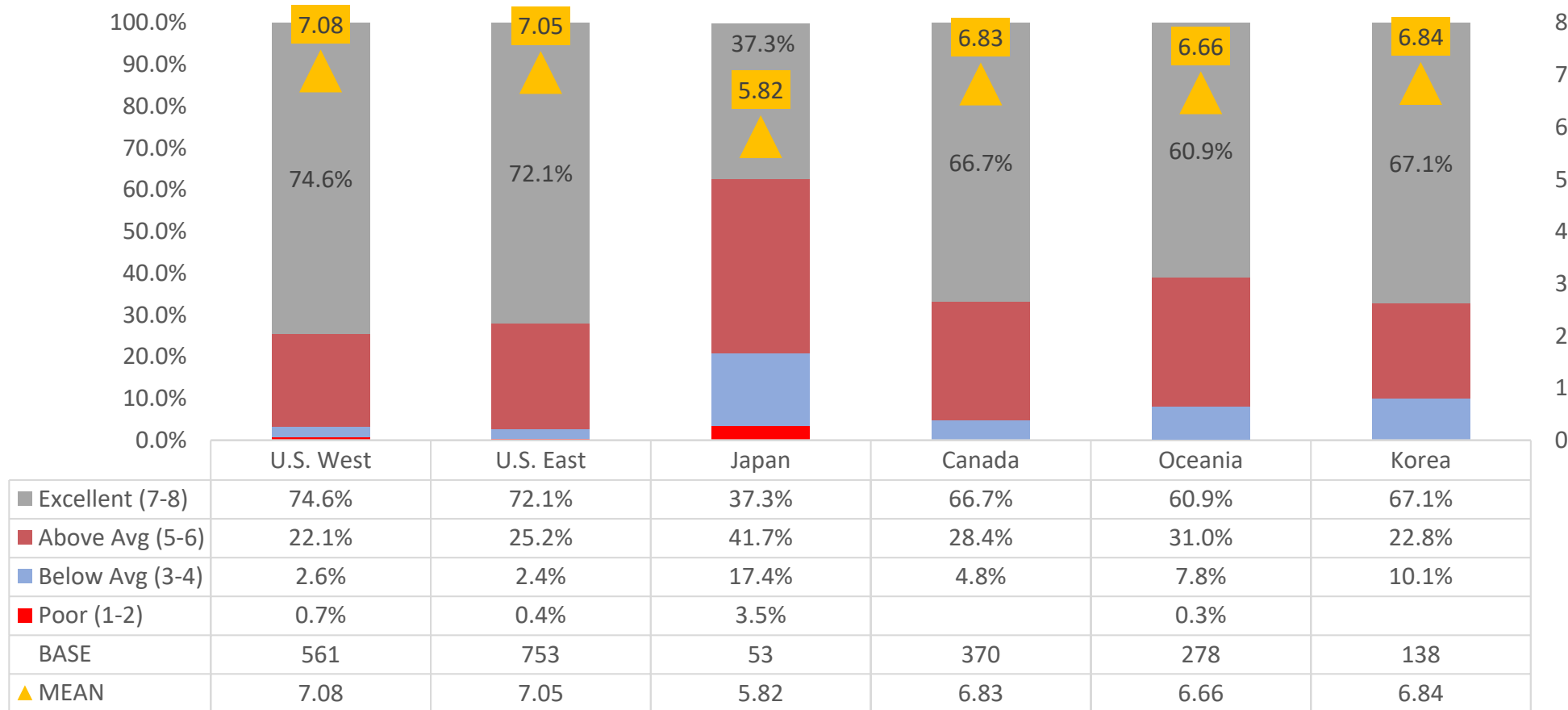
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



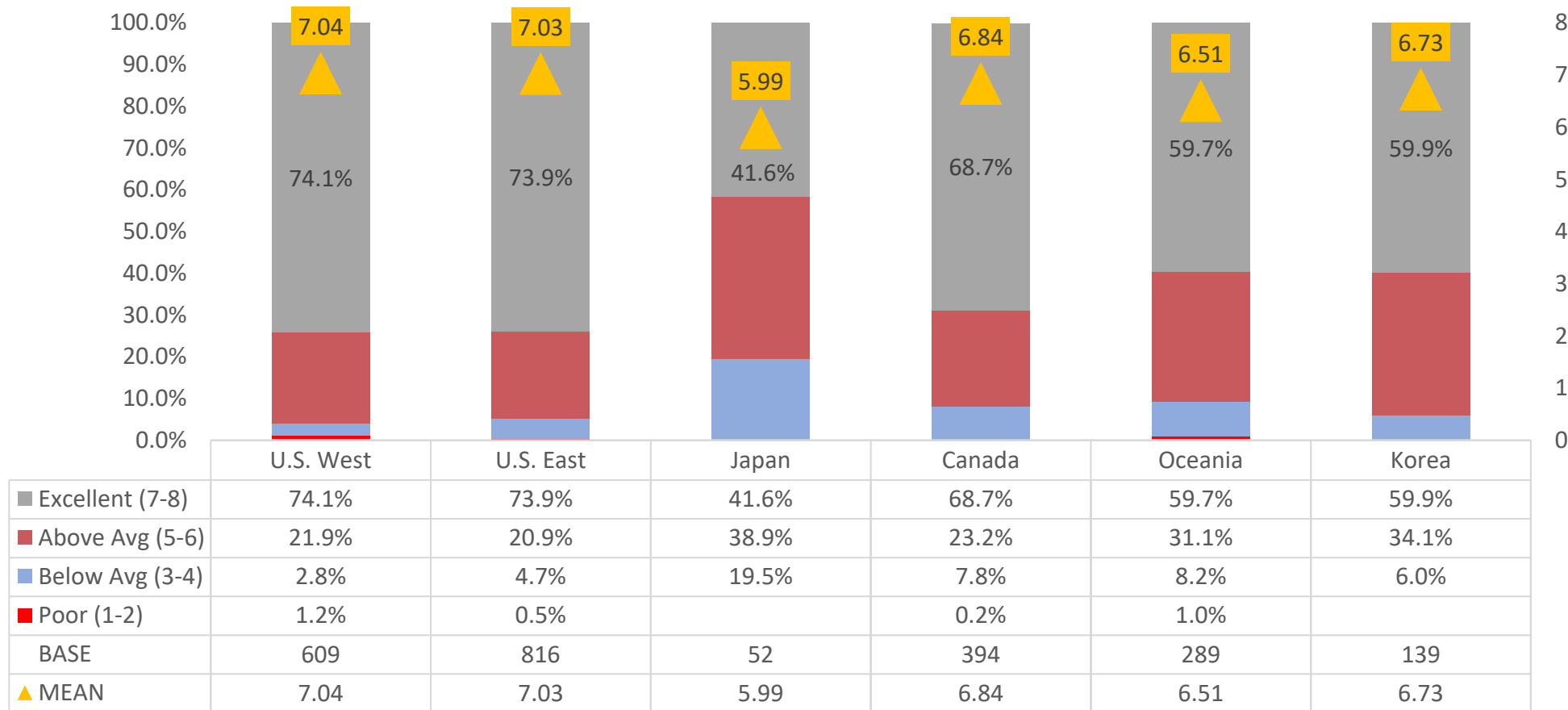
# SHOPPING - O'AHU

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



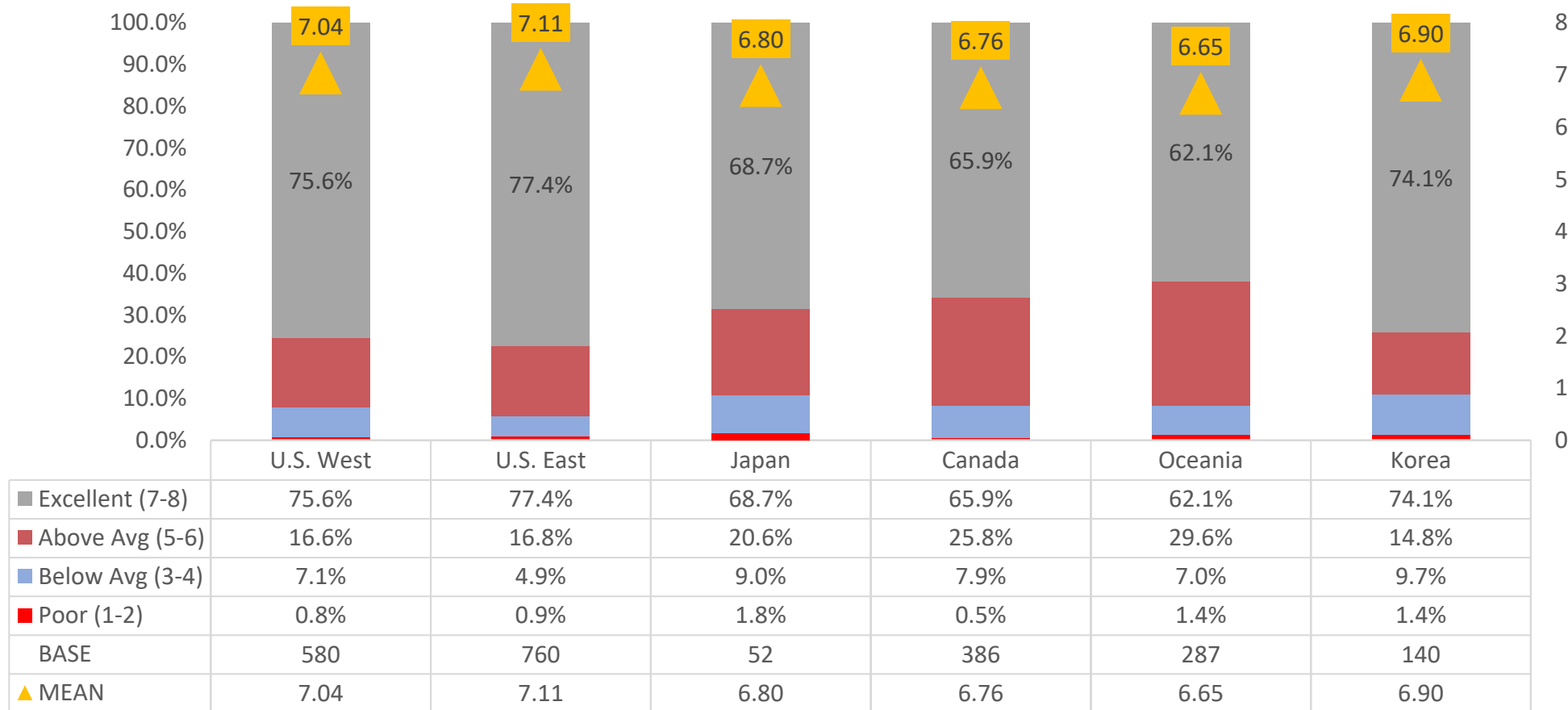
# DINING/ FOOD & BEVERAGES - O'AHU

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



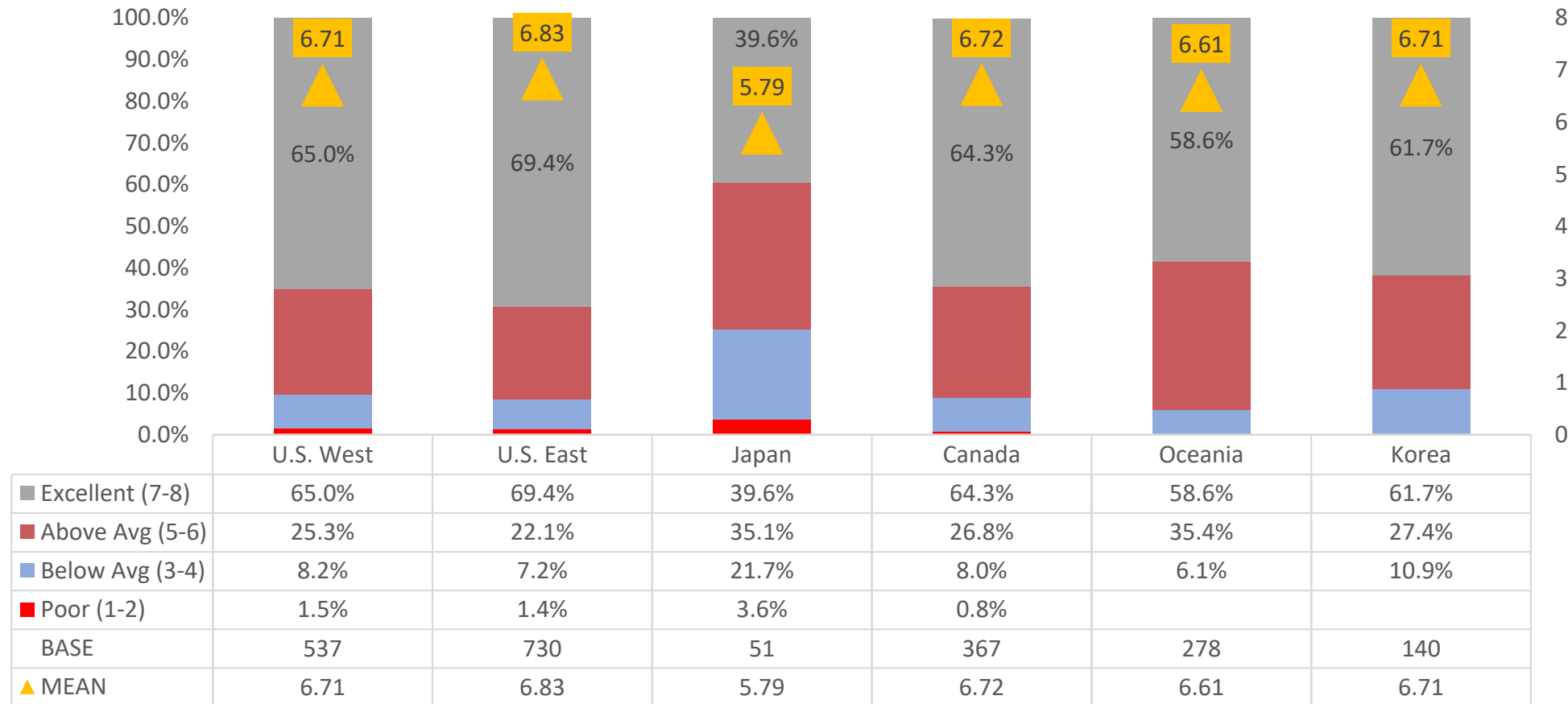
# LODGING/ ACCOMMODATIONS - O'AHU

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



# TRANSPORTATION ON ISLAND - O'AHU

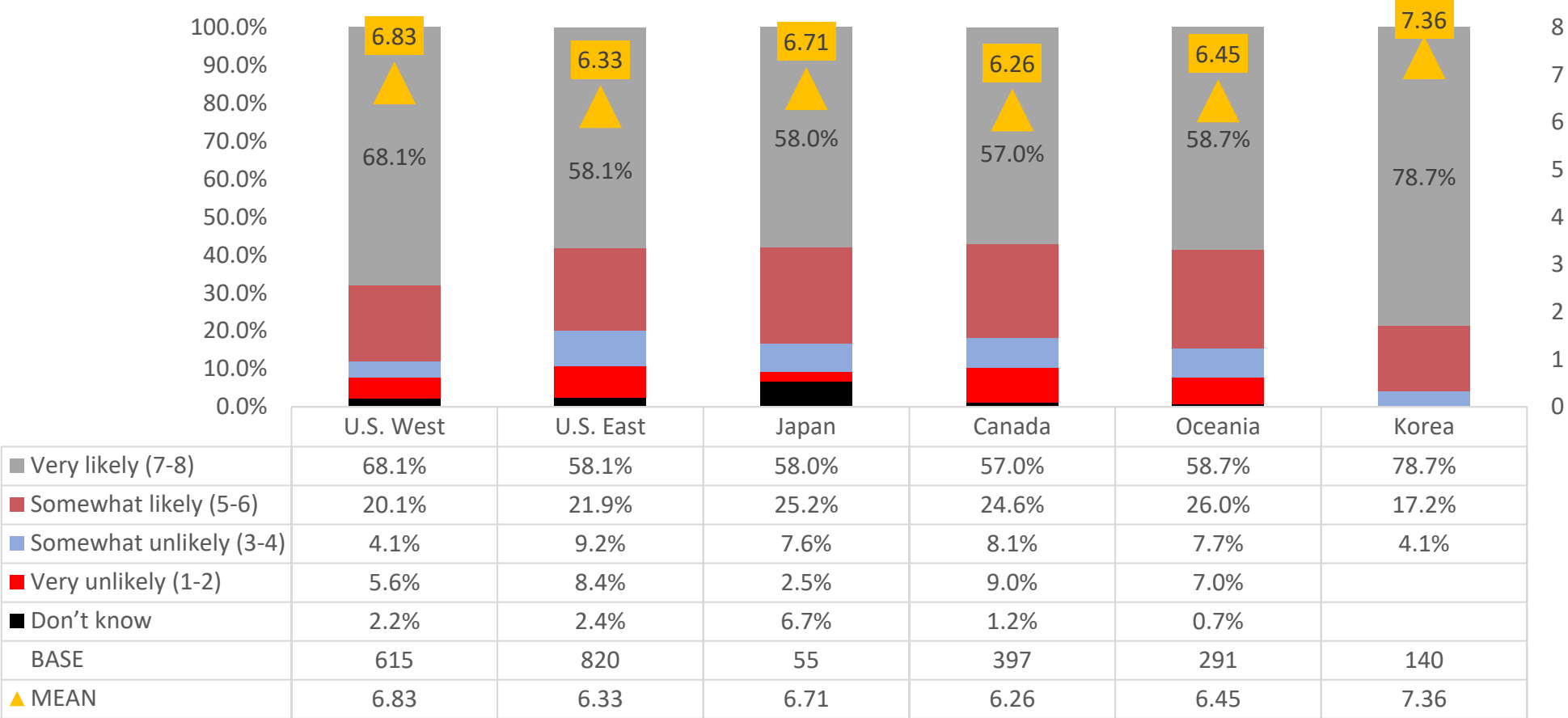
8-pt Rating Scale  
8=Excellent/ 1=Poor





# LIKELIHOOD OF RETURN VISIT - O'AHU

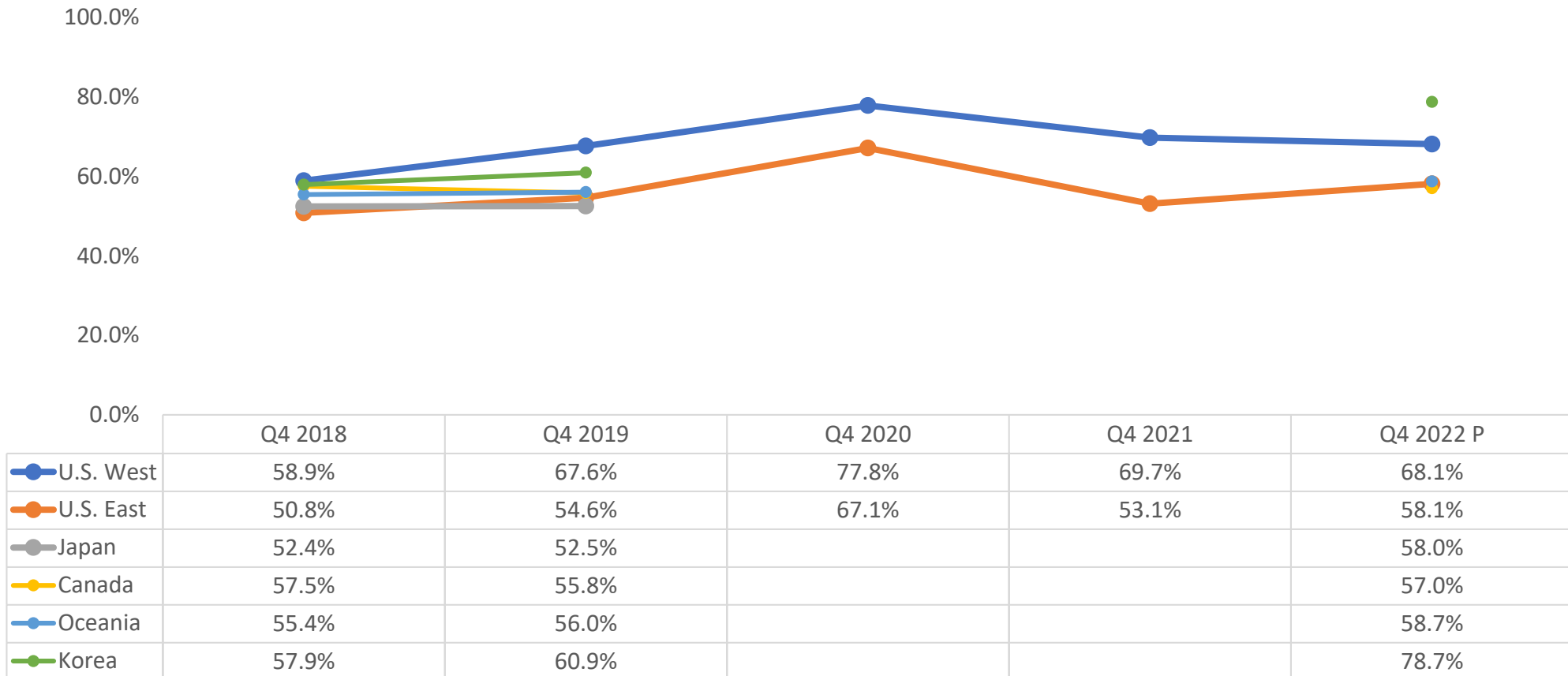
8-pt Rating Scale  
8=Very likely/ 1=Very unlikely



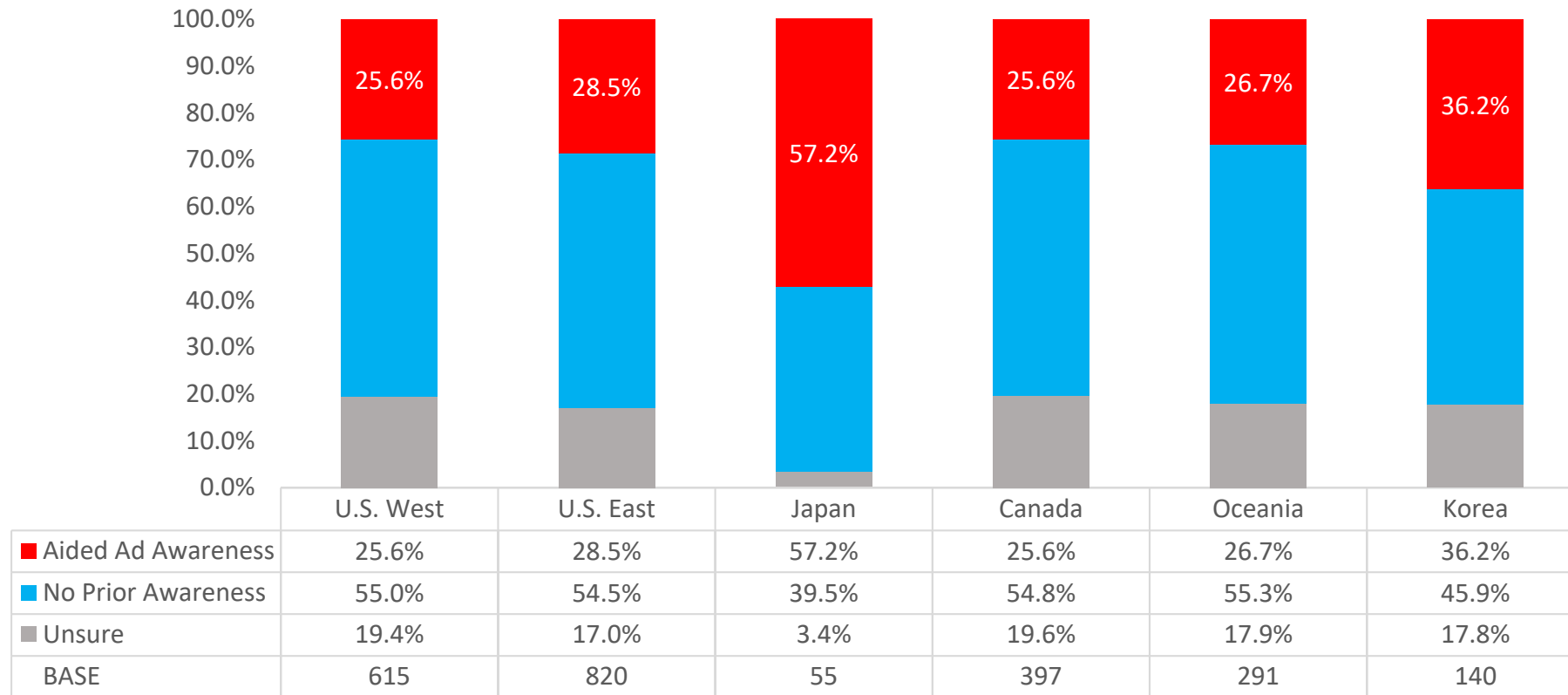
# LIKELIHOOD OF RETURN VISIT - O'AHU (CONT.)

TOP BOX - VERY LIKELY (7-8)

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



# 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	35.0%	40.3%	32.7%	46.4%	41.2%	51.6%
Hawaiian cultural events	14.3%	16.3%	16.0%	15.2%	9.8%	3.4%
Television programs or movies filmed in Hawai'i	8.8%	12.0%	43.7%	17.6%	16.2%	14.9%
Outdoor or sporting activities/ events	12.4%	15.5%	13.5%	18.2%	9.7%	8.2%
Social media posts/ videos	10.7%	11.4%	26.0%	19.0%	13.6%	21.1%
Hawaiian music	6.4%	6.2%	17.7%	9.2%	5.3%	1.4%
BASE	615	820	55	397	291	140

# ATTRACTIONS- O'AHU (1/3)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Atlantis Submarine & Cruises	2.7%	3.9%	0.0%	3.2%	3.5%	8.0%
Bernice P. Bishop Museum	3.8%	4.0%	1.7%	3.0%	1.0%	1.4%
Byodo In Temple	9.4%	10.7%	5.1%	12.8%	6.3%	0.7%
Chinatown & Honolulu Art District	11.0%	12.7%	18.8%	11.6%	7.2%	0.7%
Diamond Head State Monument	23.4%	31.3%	26.4%	39.1%	25.2%	43.2%
Dole Plantation	31.0%	36.2%	8.6%	38.8%	22.1%	39.3%
Foster Botanical Garden	2.6%	4.5%	0.0%	5.0%	0.7%	3.4%
Haleiwa	19.0%	20.2%	15.4%	21.9%	11.6%	13.8%
Hanauma Bay Nature Reserve	9.6%	10.1%	4.3%	15.6%	4.3%	16.8%
Harold L. Lyon Arboretum	0.2%	1.2%	0.0%	0.8%	0.0%	0.7%
Hawai'i State Art Museum	0.7%	0.6%	2.5%	0.8%	1.4%	3.0%
Honolulu Museum of Art	3.3%	2.0%	6.8%	3.0%	2.8%	2.7%
Hawaiian Mission Houses, Historic Site and Archive	1.1%	0.8%	0.0%	0.8%	1.1%	0.0%
Hawai'i's Plantation Village	1.3%	2.2%	0.0%	1.8%	1.4%	3.7%
Honolulu Zoo	7.0%	7.1%	4.3%	10.8%	8.1%	5.0%

# ATTRACTIONS- O'AHU (2/3)

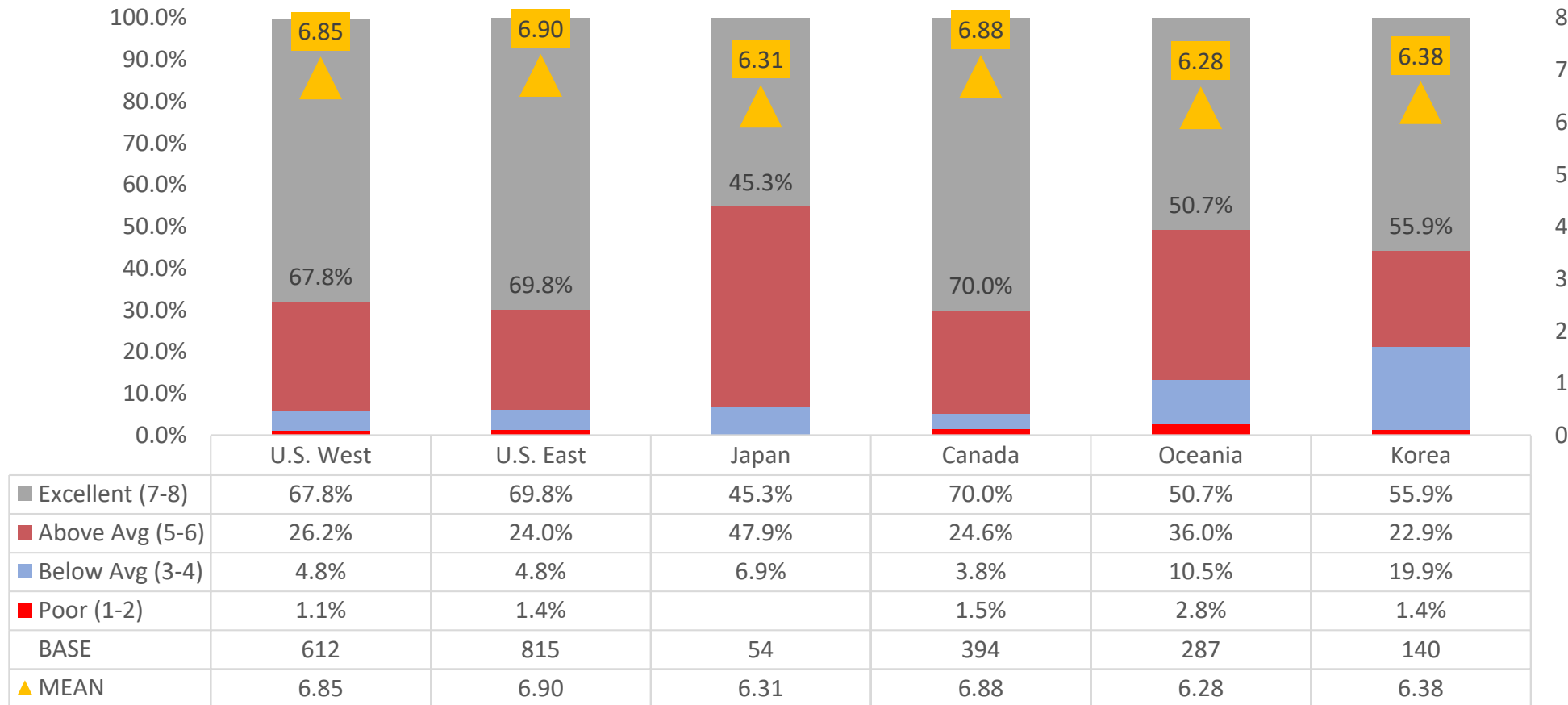
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Ho'omaluhia Botanical Garden	4.4%	6.3%	0.0%	5.8%	2.5%	3.7%
Iolani Palace State Monument	4.6%	5.5%	6.9%	7.5%	6.2%	17.3%
Kailua Town	12.3%	12.9%	12.8%	15.4%	4.1%	5.7%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	5.3%	7.7%	3.4%	5.4%	0.0%	3.4%
Kaka'ako Street Art	2.2%	2.2%	15.4%	1.7%	2.0%	2.7%
Koko Head Crater Trail	6.0%	8.0%	0.0%	9.5%	4.2%	9.0%
Kualoa Private Nature Reserve	12.7%	16.6%	6.0%	15.3%	12.8%	20.8%
Lanikai or Kailua Beach	23.6%	24.3%	25.7%	29.2%	12.4%	20.8%
Manoa Falls & Trail	7.6%	12.4%	3.4%	10.3%	4.0%	9.7%
National Memorial Cemetery of the Pacific	7.6%	12.5%	0.0%	9.4%	6.1%	5.5%
Nu'uuanu Pali Lookout	9.6%	12.4%	5.1%	11.8%	7.6%	13.5%
North Shore Beaches	41.6%	46.9%	12.8%	46.3%	30.2%	26.6%

# ATTRACTIONS- O'AHU (3/3)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Pearl Harbor National Memorial</b>	31.7%	48.0%	1.7%	40.8%	33.4%	5.0%
<b>Battleship Missouri Memorial</b>	12.7%	20.5%	0.0%	17.9%	15.8%	1.6%
<b>Pearl Harbor Aviation Museum</b>	11.5%	18.3%	1.7%	17.6%	15.8%	4.2%
<b>Pacific Fleet Submarine Museum</b>	6.6%	6.7%	0.0%	7.3%	7.5%	1.4%
<b>Polynesian Cultural Center</b>	13.1%	17.6%	3.4%	17.7%	7.0%	10.6%
<b>Queen Emma's Summer Palace</b>	2.6%	1.5%	1.7%	1.3%	2.8%	3.7%
<b>Sea Life Park Hawai'i</b>	5.9%	5.5%	0.0%	4.6%	2.1%	8.6%
<b>Waikiki Aquarium</b>	3.9%	5.3%	4.3%	5.8%	3.7%	5.0%
<b>Waimanalo Beach Park</b>	8.6%	9.2%	6.0%	10.6%	5.8%	10.6%
<b>Waimea Valley</b>	15.4%	20.4%	3.4%	16.0%	8.0%	9.4%

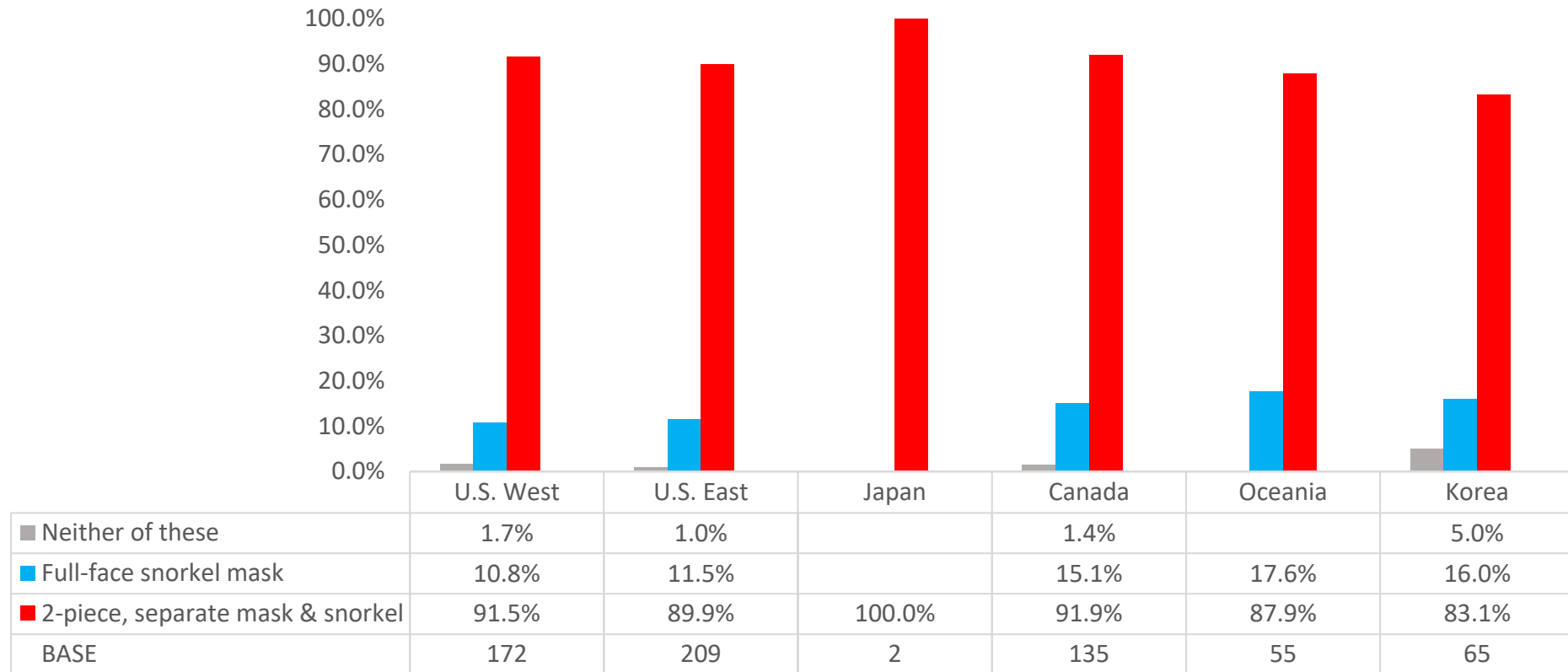
# DANIEL K. INOUE INTERNATIONAL AIRPORT

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





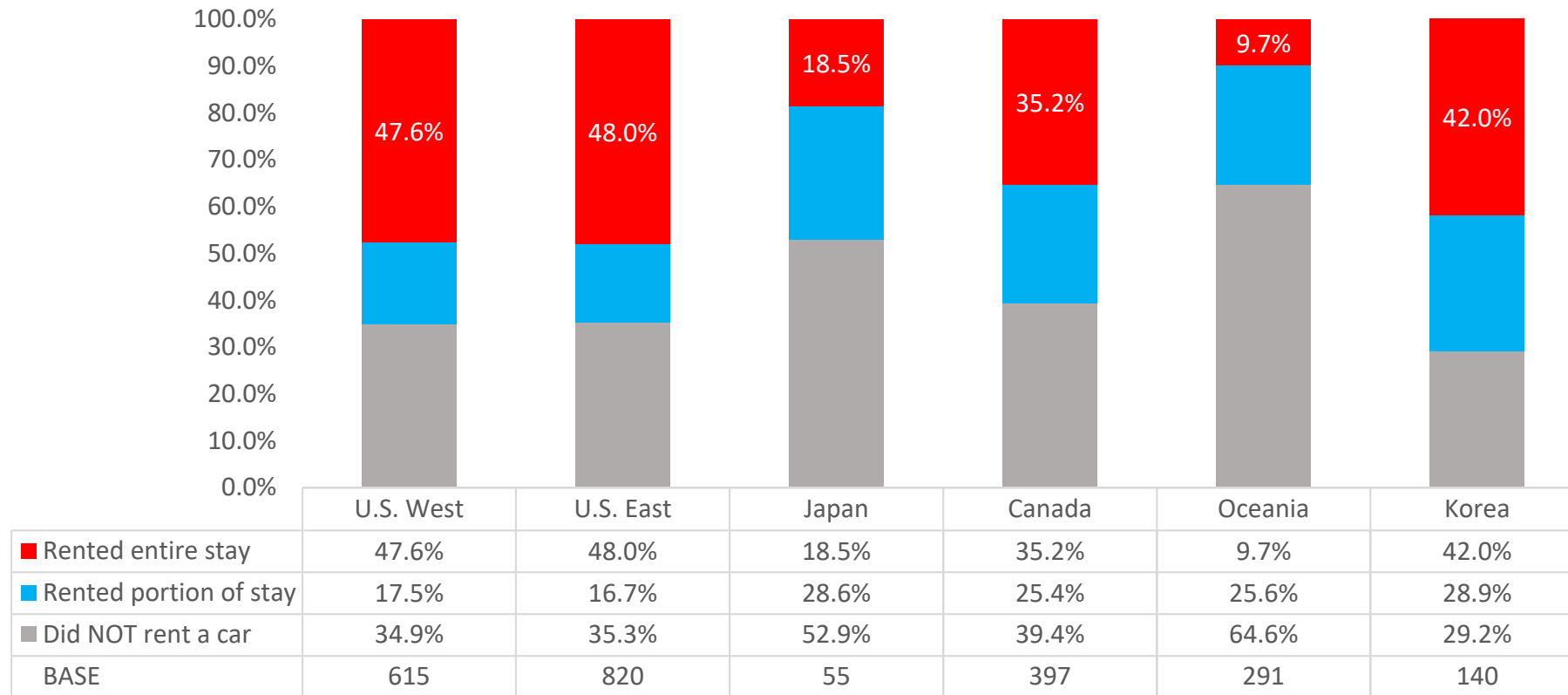
# SNORKELING EQUIPMENT USED - O'AHU



# SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Did not have to be assisted or rescued</b>	93.8%	98.1%	100.0%	99.2%	100.0%	100.0%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	6.2%	1.5%	-	0.8%	-	-
<b>Yes, while snorkeling using a full face snorkel mask</b>	-	0.5%	-	-	-	-
<b>BASE</b>	169	207	2	133	55	62

# CAR RENTAL - O'AHU



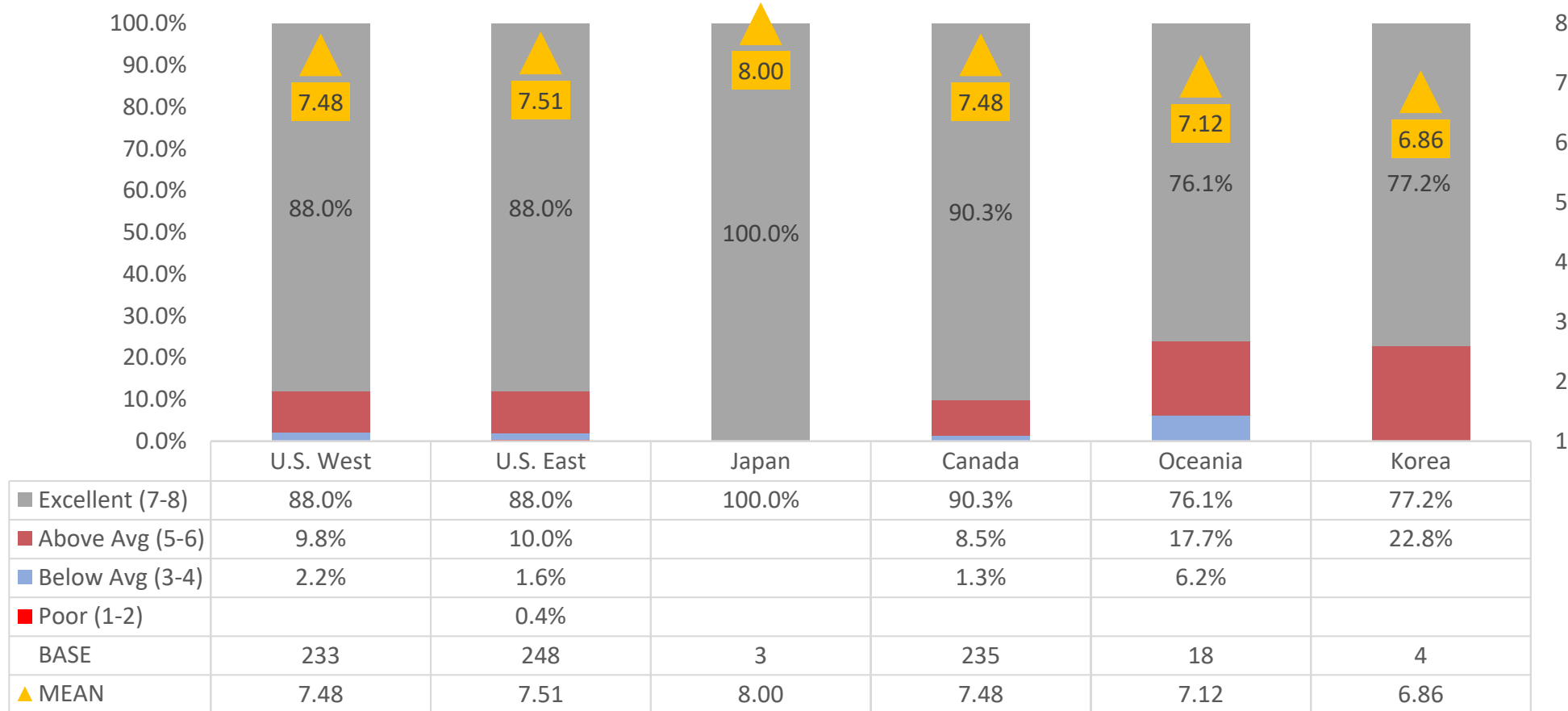
# REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
I only needed a vehicle on certain days	80.4%	79.5%	88.2%	64.8%	81.1%	61.8%
Parking was too expensive at my hotel/ lodging	39.6%	26.9%	26.4%	41.4%	34.4%	42.0%
Car rental rates were too expensive	21.9%	25.5%	8.7%	32.0%	28.0%	18.9%
Vehicles were not available for all of my trip dates	0.9%	3.8%	-	3.9%	2.8%	12.7%
BASE	106	137	16	101	75	40

# Section 6 – KAUA'I

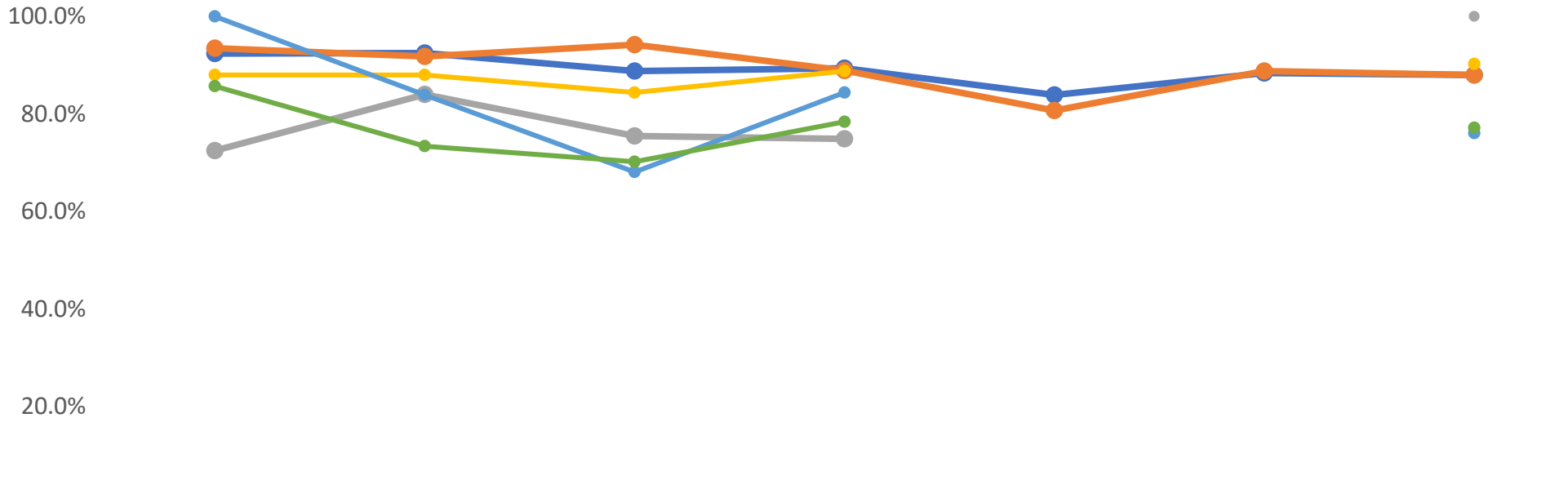
# SATISFACTION - KAUUA'I

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



# SATISFACTION - KAUA'I (CONT.)

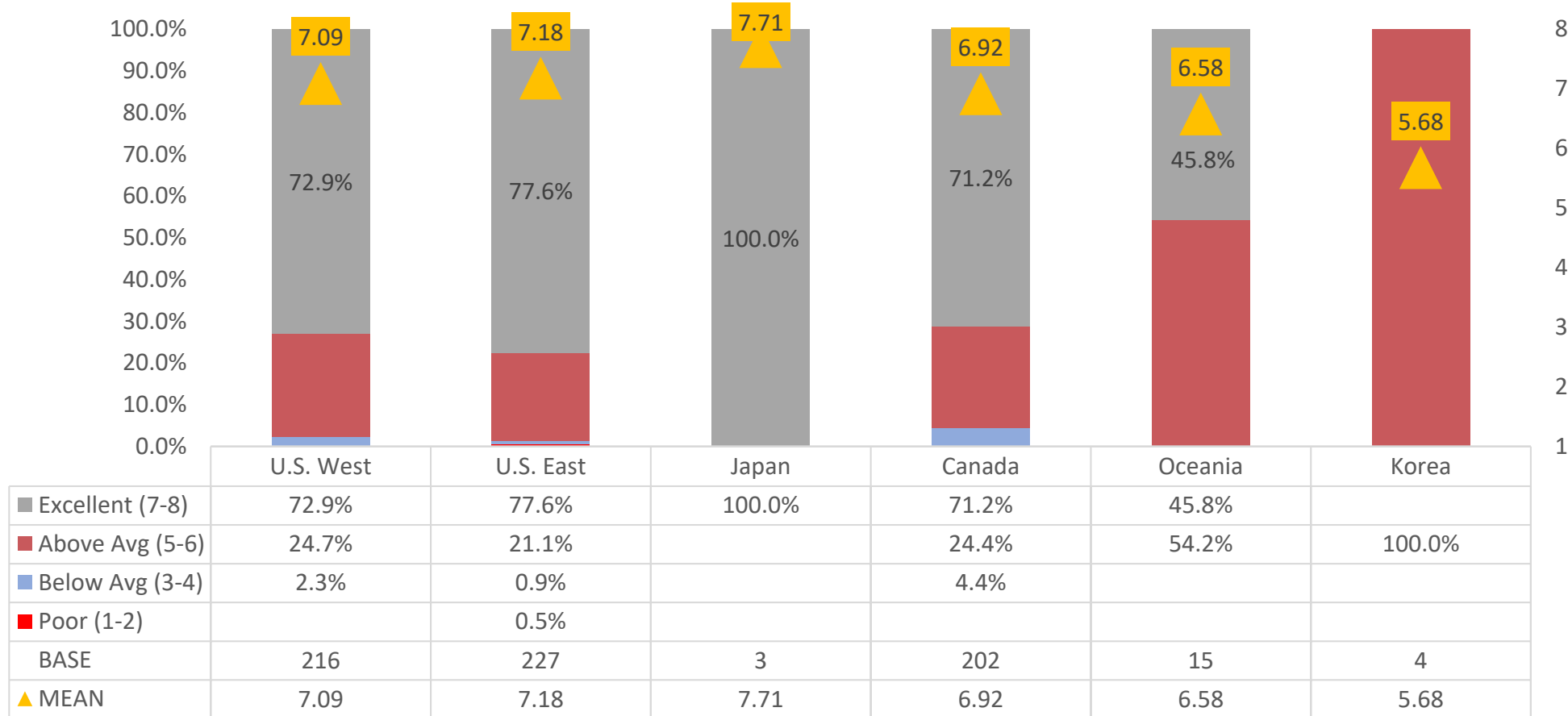
Tracking Data – Rating of “Excellent” (7-8)



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	92.4%	92.5%	88.8%	89.4%	83.9%	88.4%	88.0%
U.S. East	93.5%	91.8%	94.2%	88.9%	80.7%	88.8%	88.0%
Japan	72.5%	84.0%	75.5%	74.9%			100.0%
Canada	88.0%	88.0%	84.4%	88.8%			90.3%
Oceania	100.0%	83.9%	68.1%	84.4%			76.1%
Korea	85.7%	73.4%	70.2%	78.4%			77.2%

# ENTERTAINMENT/ ATTRACTIONS - KAUA'I

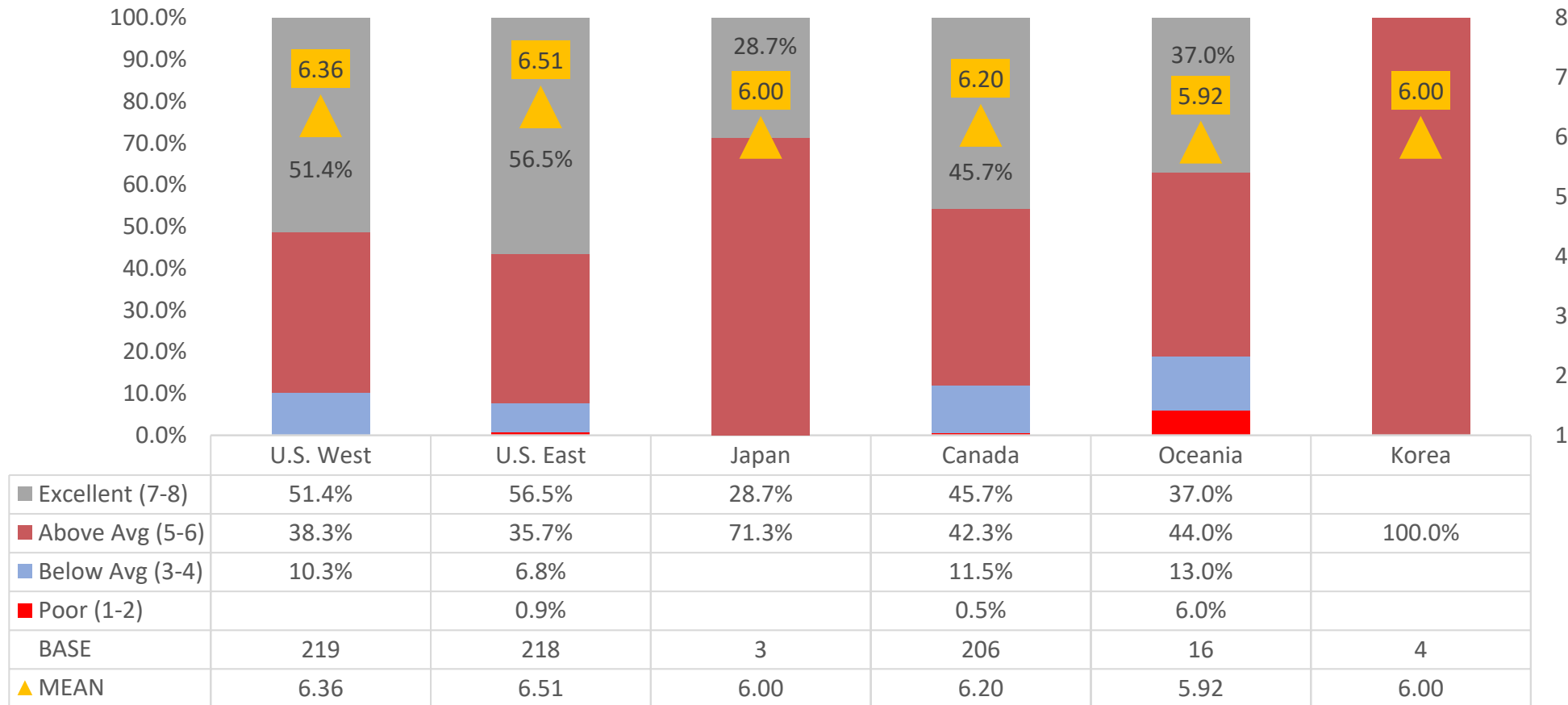
8-pt Rating Scale  
8=Excellent/ 1=Poor





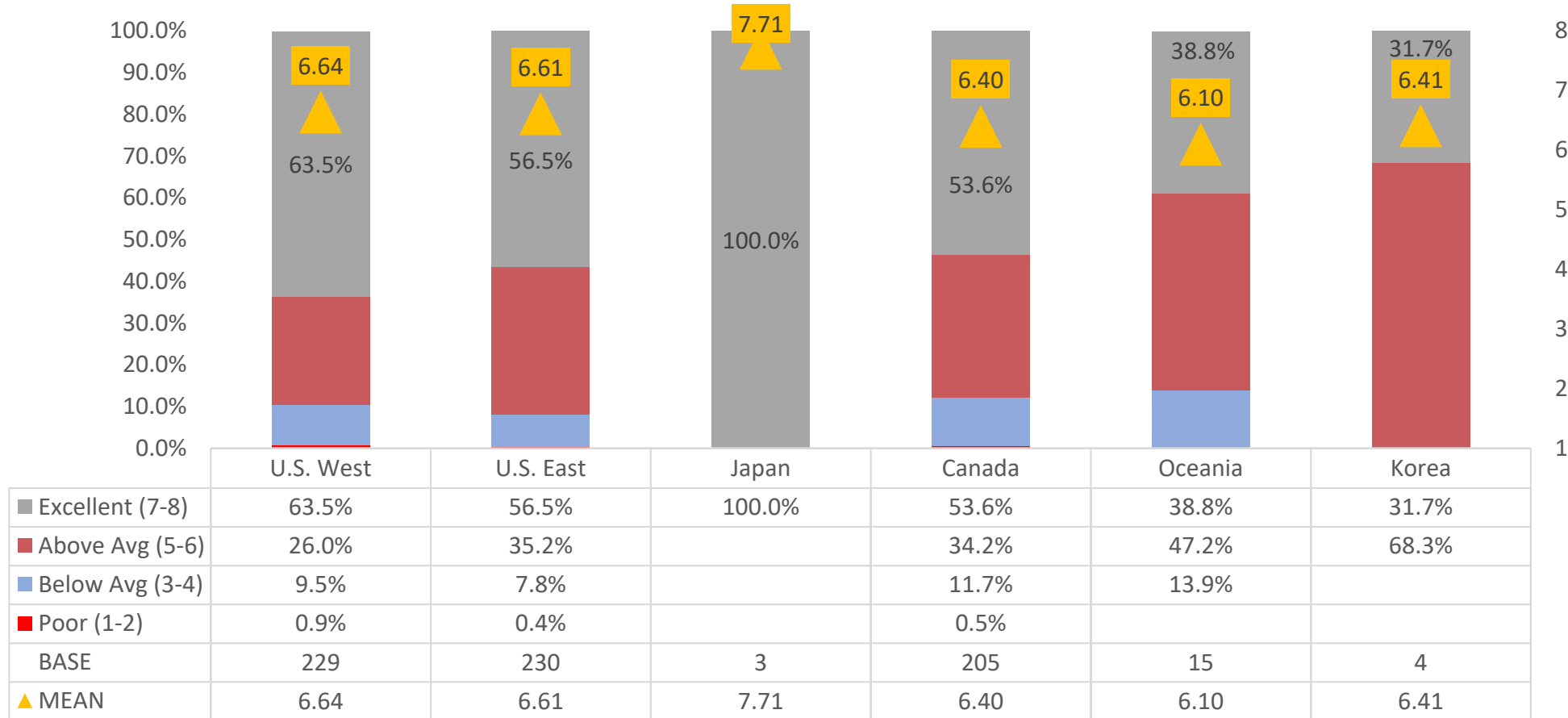
# SHOPPING - KAUA'I

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



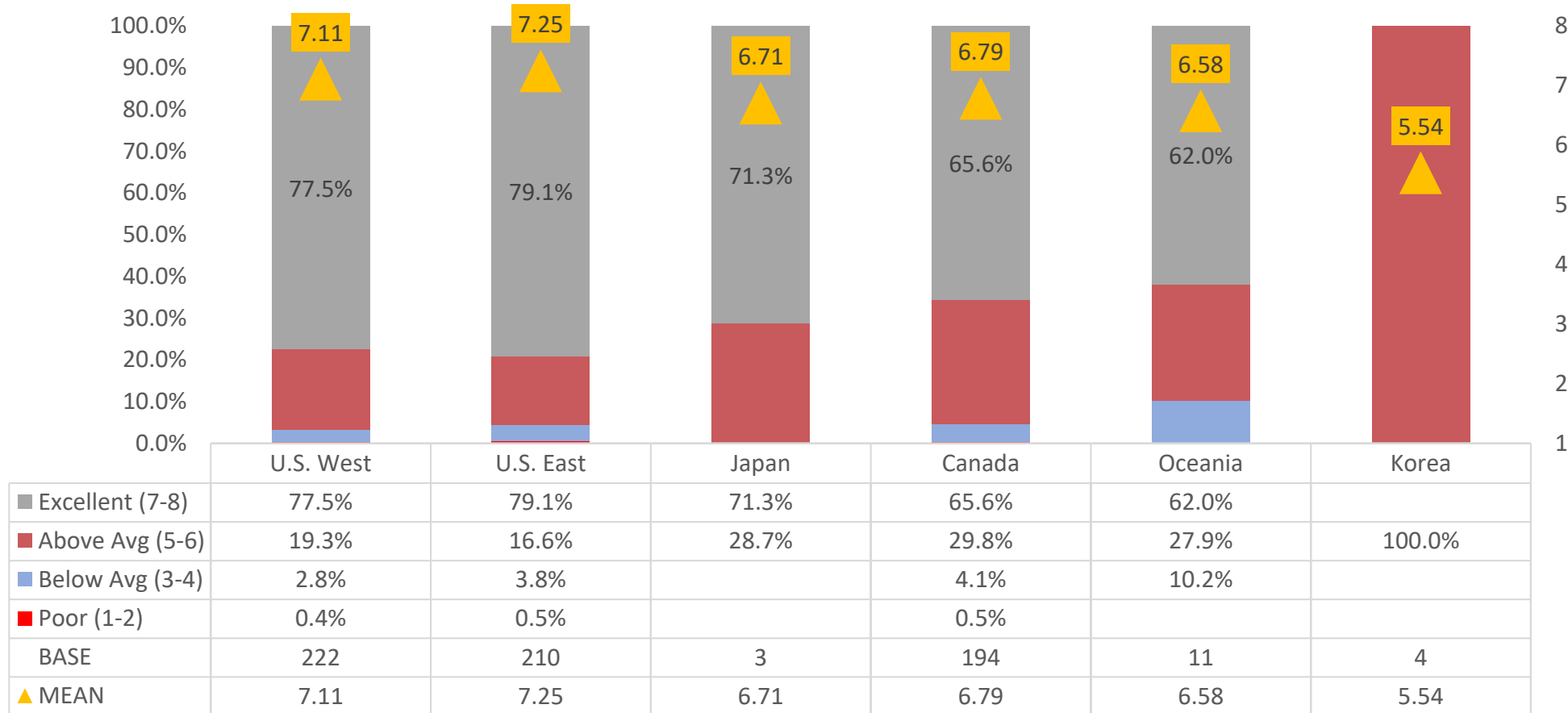
# DINING/ FOOD & BEVERAGE - KAUA'I

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



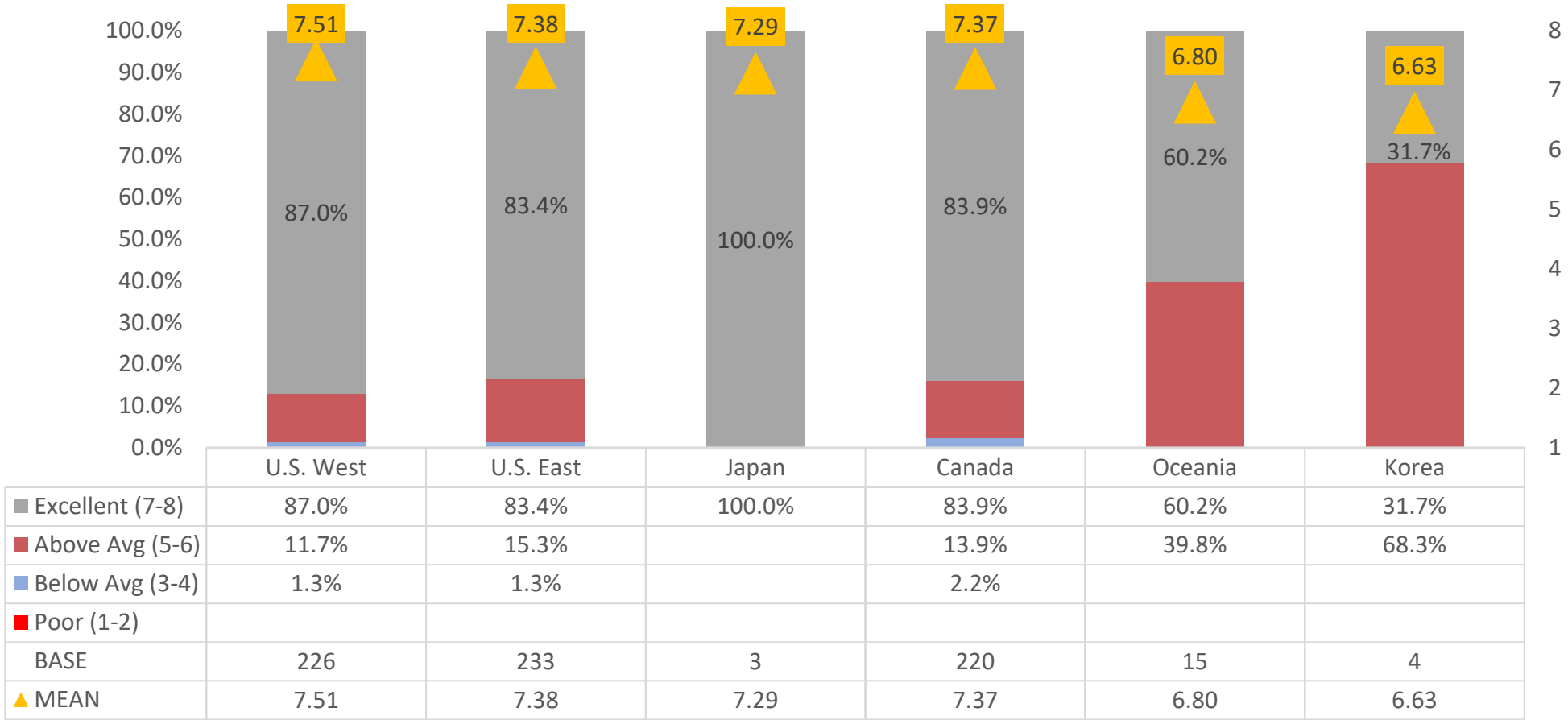
# LODGING/ ACCOMMODATIONS - KAUA'I

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



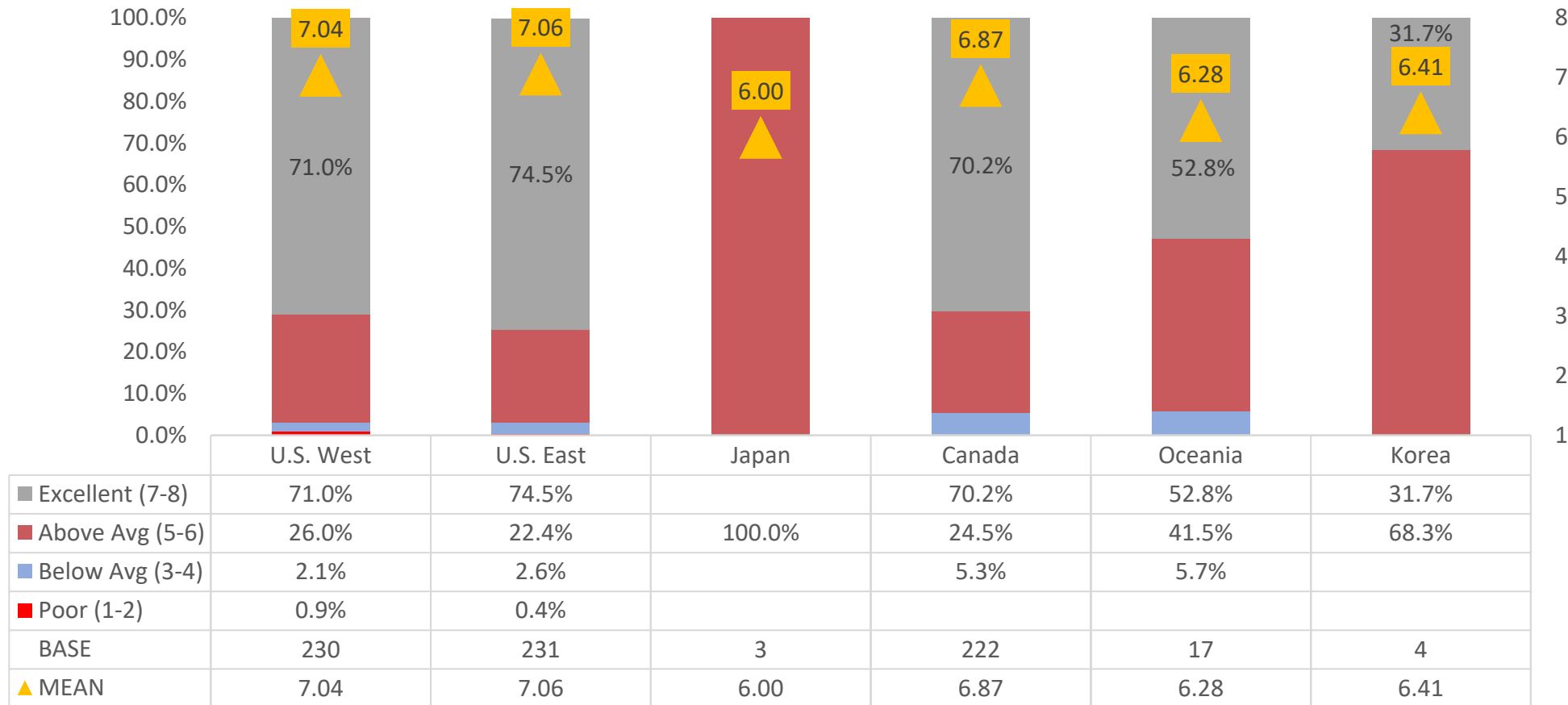
# BEACHES - KAUA'I

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



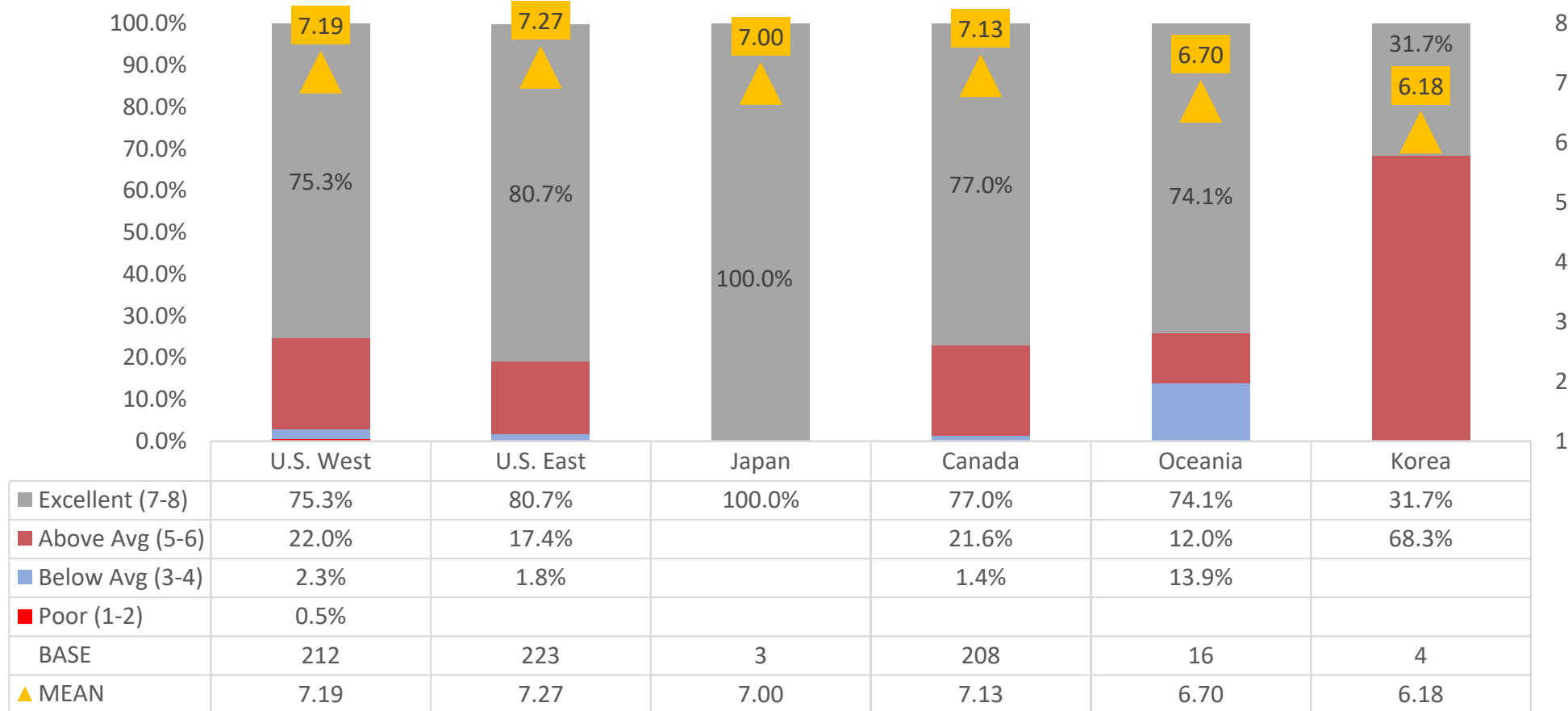
# PUBLIC AREAS - KAUA'I

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



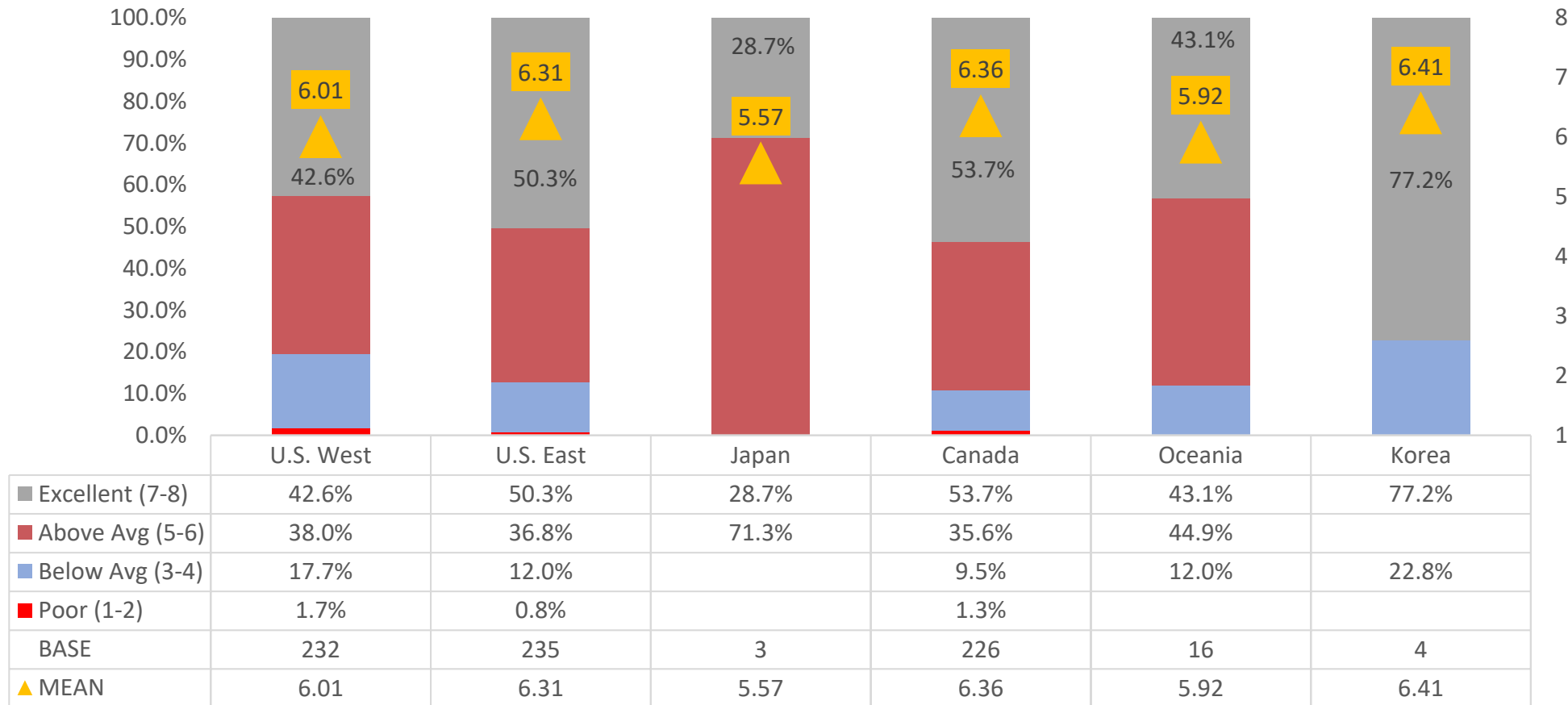
# PARKS - KAUA'I

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



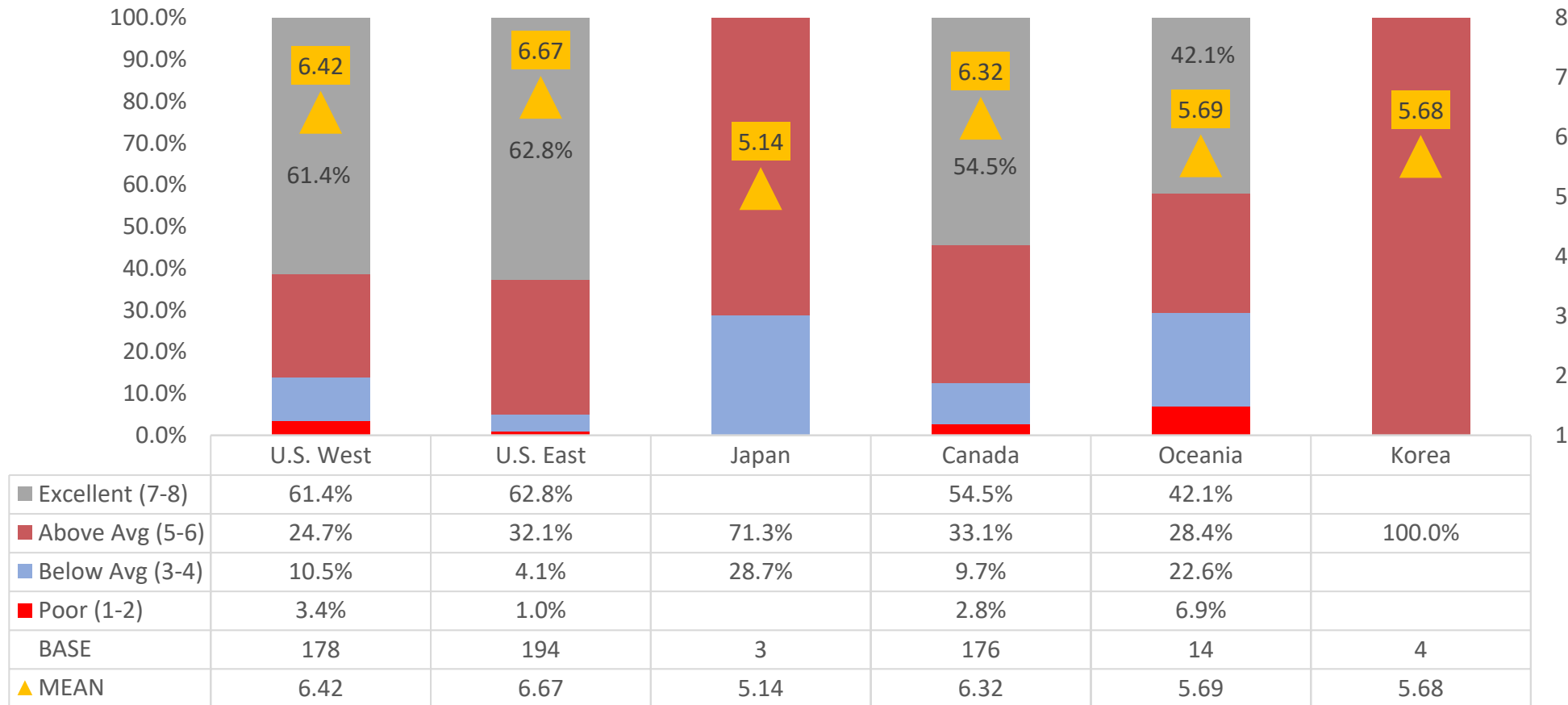
# ROADS - KAUA'I

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



# TRANSPORTATION ON ISLAND - KAUA'I

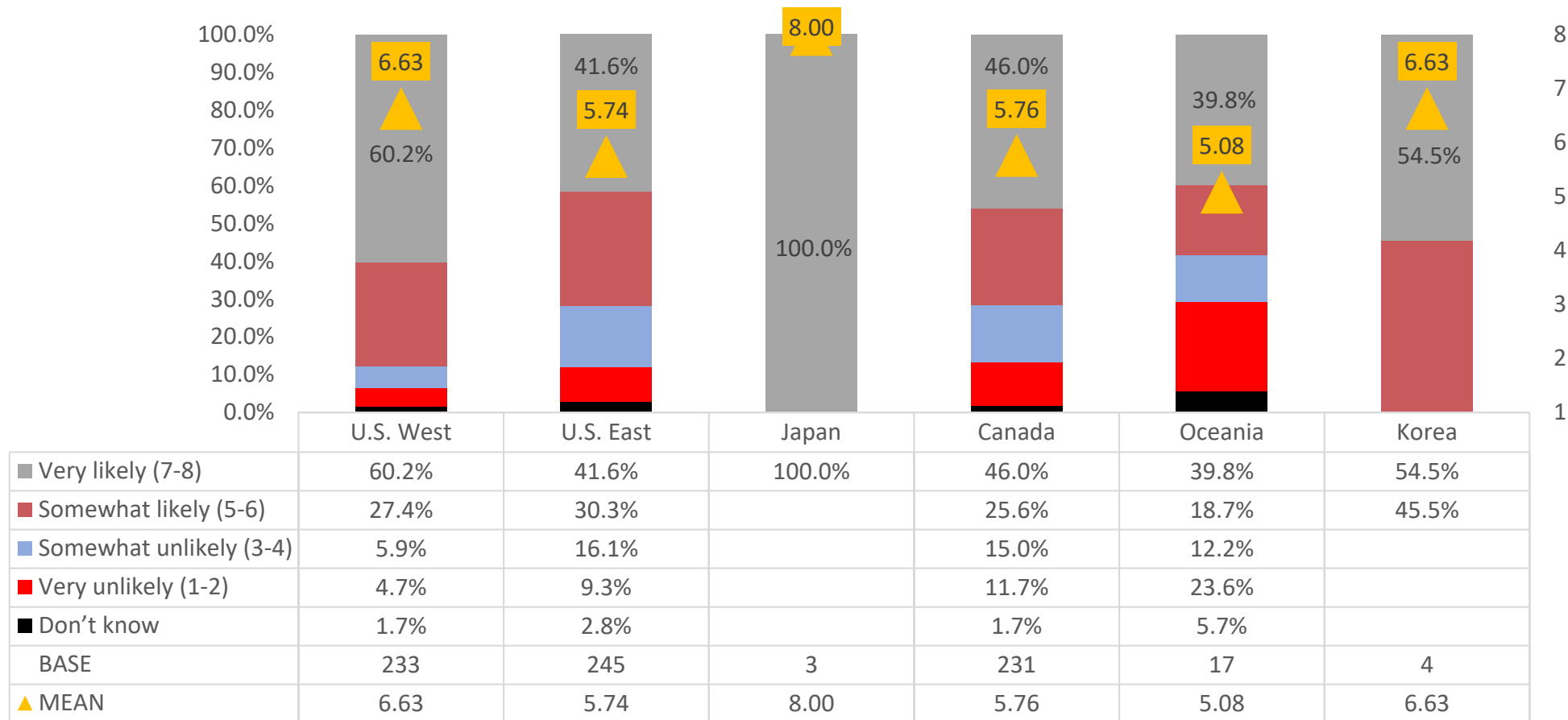
8-pt Rating Scale  
8=Excellent/ 1=Poor





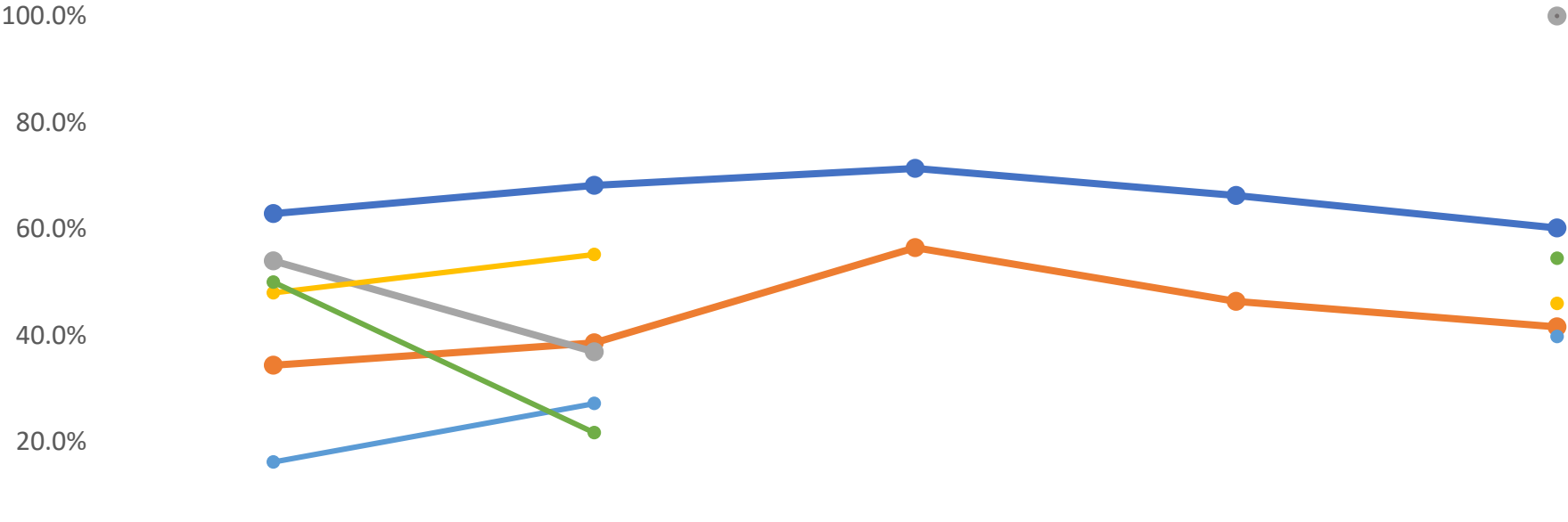
# LIKELIHOOD OF RETURN VISIT - KAUA'I

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



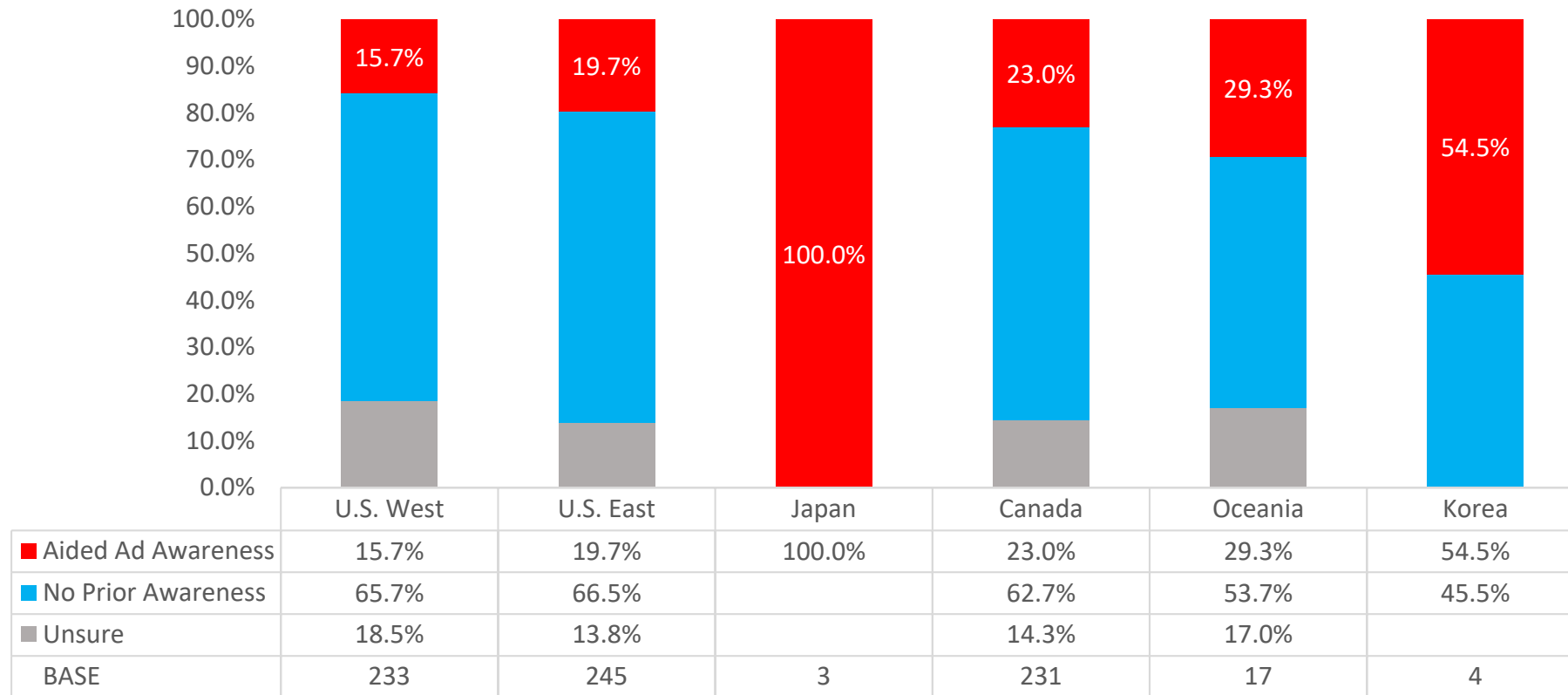
# LIKELIHOOD OF RETURN VISIT - KAUA'I (CONT.)

TOP BOX - VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	62.9%	68.2%	71.4%	66.3%	60.2%
U.S. East	34.4%	38.6%	56.5%	46.4%	41.6%
Japan	54.0%	36.9%			100.0%
Canada	48.0%	55.2%			46.0%
Oceania	16.2%	27.2%			39.8%
Korea	50.0%	21.7%			54.5%

# AIDED ADVERTISING AWARENESS - KAUA'I



# MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Famous landmarks or imagery/ natural beauty</b>	43.7%	41.4%	100.0%	39.1%	23.6%	45.5%
<b>Outdoor or sporting activities/ events</b>	19.6%	13.6%	28.7%	13.3%	17.9%	-
<b>Social media posts/ videos</b>	7.9%	7.7%	-	7.9%	5.7%	68.3%
<b>Hawaiian cultural events</b>	5.5%	7.0%	-	6.6%	-	-
<b>Television programs or movies filmed in Hawai'i</b>	2.2%	7.0%	42.6%	12.6%	17.0%	-
<b>Hawaiian music</b>	2.9%	2.1%	-	4.0%	-	-
<b>BASE</b>	233	245	3	231	17	4

# ATTRACTIONS- KAUA'I (1/2)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Fern Grotto</b>	10.3%	9.0%	0.0%	9.4%	17.9%	0.0%
<b>Hanalei Town</b>	58.7%	45.3%	42.6%	57.9%	46.3%	31.7%
<b>Hanalei Beach</b>	54.5%	48.2%	71.3%	54.2%	52.0%	31.7%
<b>Kalapaki Beach</b>	19.2%	24.2%	0.0%	33.1%	11.4%	0.0%
<b>Kalalau Trail</b>	13.4%	13.7%	0.0%	15.8%	5.7%	31.7%
<b>Bike Path in Kapaa</b>	8.2%	6.2%	0.0%	9.4%	0.0%	31.7%
<b>Kaua'i Museum</b>	2.2%	1.2%	0.0%	2.6%	0.0%	0.0%
<b>Ke'e Beach</b>	9.9%	10.7%	0.0%	10.7%	11.4%	0.0%
<b>Kilauea Lighthouse</b>	23.3%	24.8%	0.0%	30.3%	23.6%	0.0%
<b>Koke'e</b>	10.7%	10.7%	42.6%	8.4%	0.0%	0.0%

# ATTRACTIONS- KAUA'I (2/2)

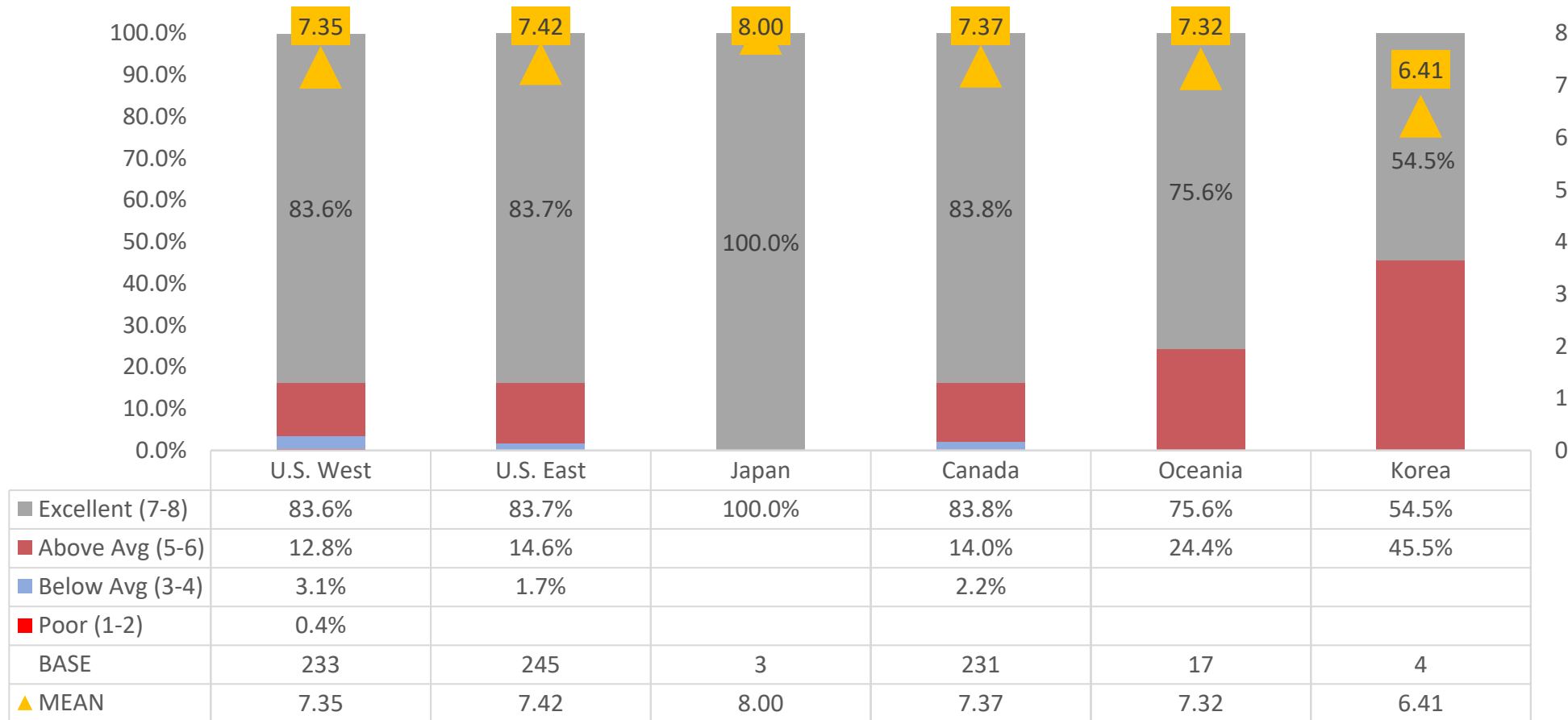
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Koke'e Museum</b>	4.7%	3.3%	0.0%	3.1%	5.7%	0.0%
<b>Na Aina Kai Gardens</b>	2.6%	2.1%	0.0%	1.3%	0.0%	0.0%
<b>Napali Coast</b>	39.6%	54.2%	42.6%	39.6%	30.1%	77.2%
<b>Allerton Garden</b>	6.1%	6.6%	0.0%	9.4%	5.7%	0.0%
<b>Limahuli Garden</b>	7.7%	2.8%	0.0%	6.1%	5.7%	0.0%
<b>Old Koloa Town</b>	39.4%	28.2%	28.7%	39.2%	28.4%	31.7%
<b>Opaeka'a Falls</b>	12.8%	20.5%	0.0%	20.6%	5.7%	31.7%
<b>Po'ipu Beach</b>	65.7%	58.7%	28.7%	60.6%	28.4%	45.5%
<b>Smith's Tropical Paradise Gardens</b>	12.6%	4.9%	0.0%	5.5%	0.0%	0.0%
<b>Spouting Horn</b>	33.9%	31.6%	0.0%	38.0%	17.0%	45.5%
<b>Wailua Falls</b>	30.3%	39.3%	42.6%	39.2%	18.7%	31.7%

# ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Wailua River	22.4%	22.9%	0.0%	20.0%	29.3%	0.0%
Waimea Canyon	48.6%	58.9%	71.3%	62.2%	46.3%	77.2%
Disc Golf	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Mini Golf	2.1%	2.1%	0.0%	4.9%	0.0%	0.0%

# FRIENDLINESS OF KAUA'I RESIDENTS

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

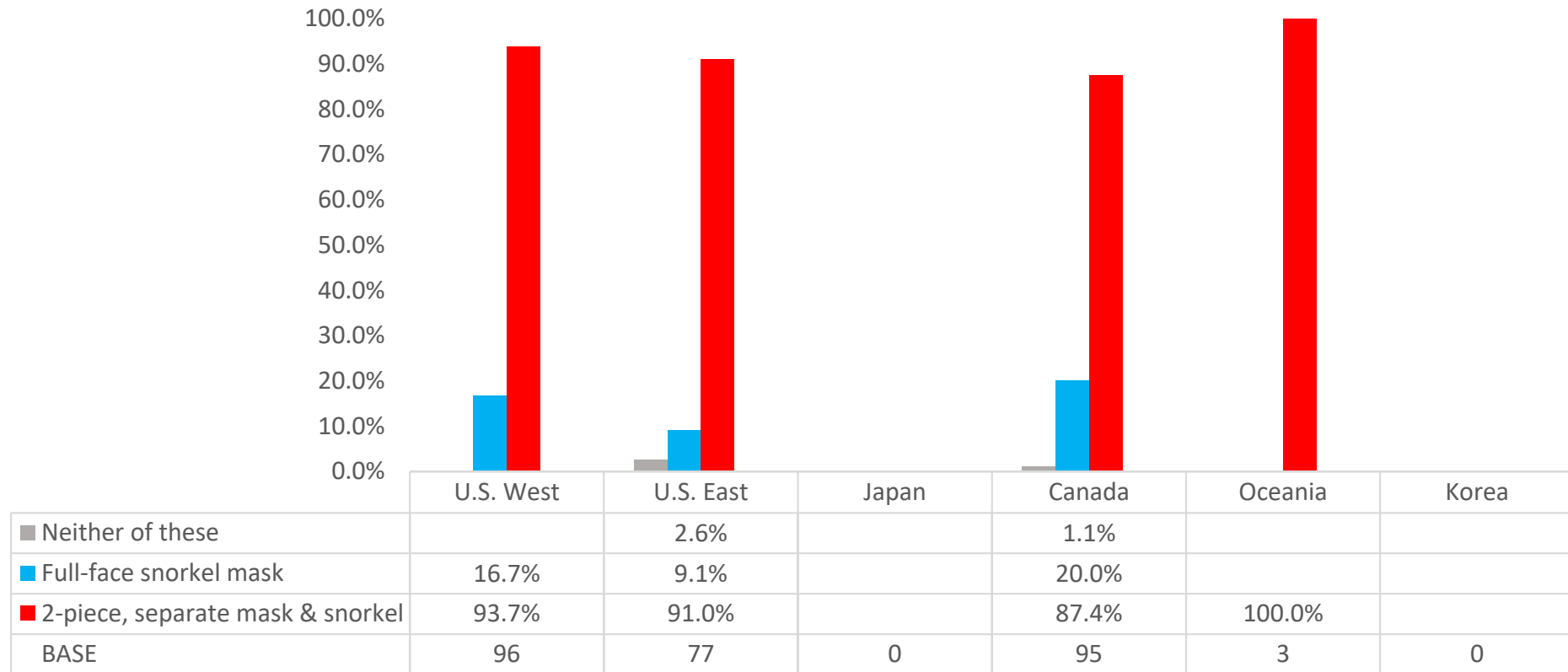




# TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Been here before	43.4%	28.6%	57.4%	29.2%	17.0%	0.0%
Friend recommendation	33.8%	28.2%	0.0%	28.6%	30.1%	77.2%
Cruise line stop/part of tour	1.7%	13.3%	0.0%	13.2%	30.1%	0.0%
Visiting Family/ Friends	3.9%	2.9%	0.0%	3.6%	5.7%	0.0%
Attending Conference/ Event	3.4%	4.0%	0.0%	2.1%	0.0%	0.0%
Article/ Blog	1.7%	3.6%	42.6%	5.3%	0.0%	0.0%
Location/ Never been, but went to other islands	3.0%	2.5%	0.0%	1.8%	5.7%	0.0%
Own a timeshare	1.7%	2.9%	0.0%	4.0%	5.7%	0.0%
Package price/ affordability / cost	1.7%	1.6%	0.0%	0.9%	0.0%	0.0%

# SNORKELING EQUIPMENT USED - KAUA'I



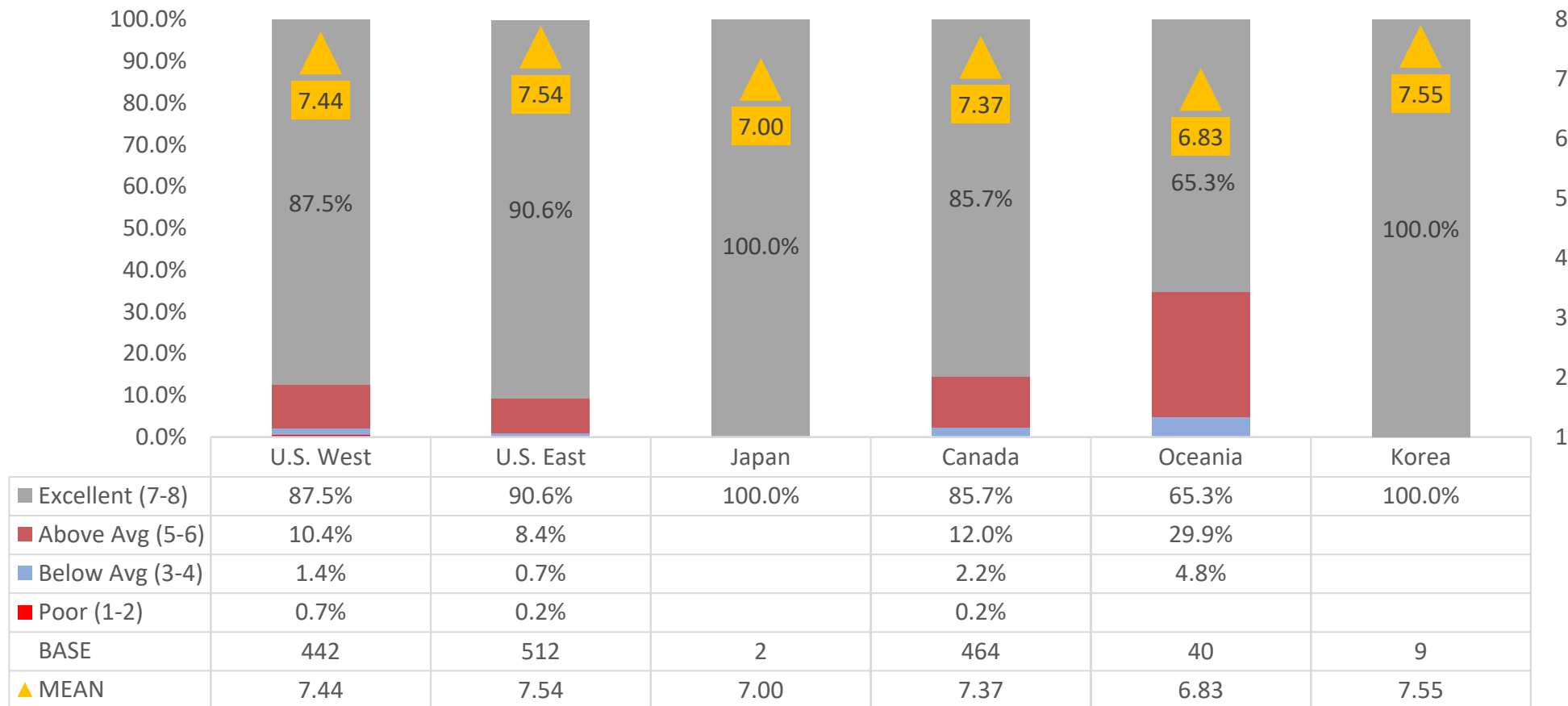
# SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	99.0%	100.0%	-	100.0%	100.0%	-
Yes, needed assistance using 2 piece mask & snorkel	1.0%	-	-	-	-	-
Yes, while snorkeling using a full face snorkel mask	-	-	-	-	-	-
<b>BASE</b>	96	75	0	94	3	0

# Section 7 – MAUI

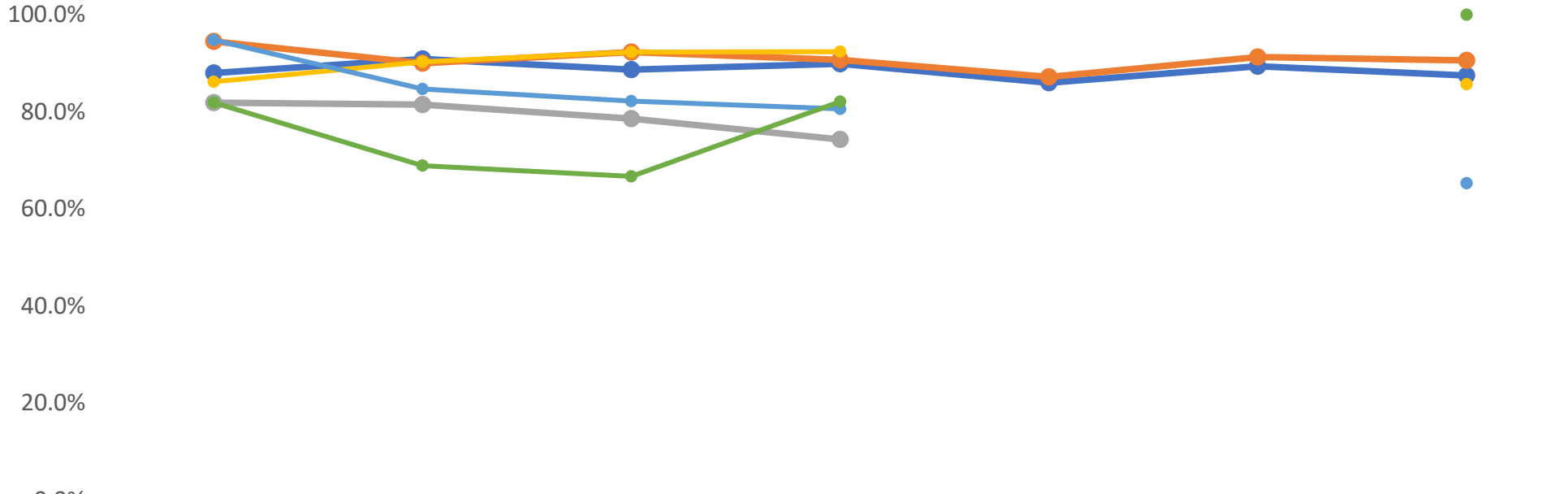
# SATISFACTION - MAUI

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



# SATISFACTION - MAUI (CONT.)

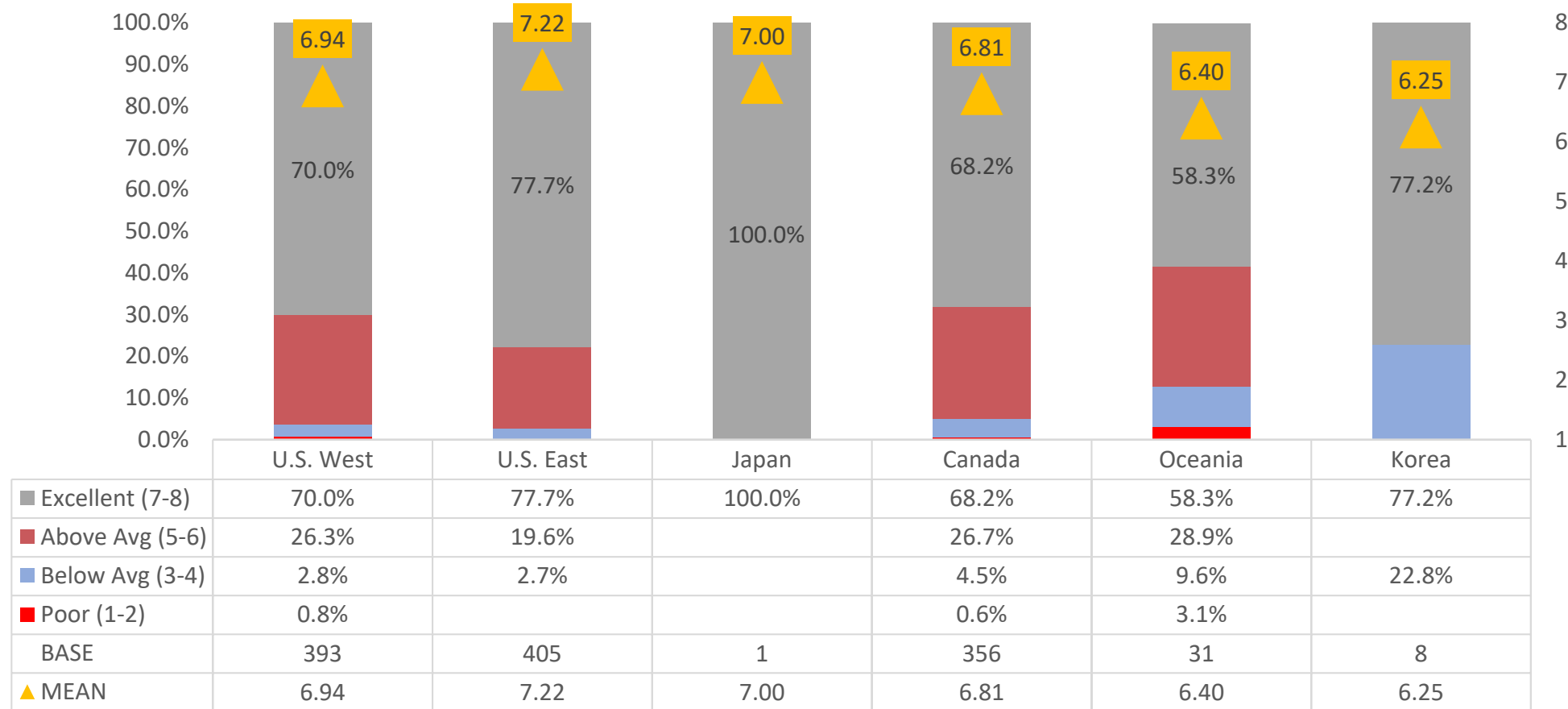
Tracking Data – Rating of “Excellent” (7-8)



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	88.0%	90.9%	88.7%	89.9%	86.0%	89.4%	87.5%
U.S. East	94.5%	90.0%	92.3%	90.7%	87.2%	91.3%	90.6%
Japan	81.9%	81.5%	78.6%	74.3%			100.0%
Canada	86.2%	90.3%	92.3%	92.4%			85.7%
Oceania	94.8%	84.7%	82.2%	80.6%			65.3%
Korea	81.9%	68.9%	66.7%	82.1%			100.0%

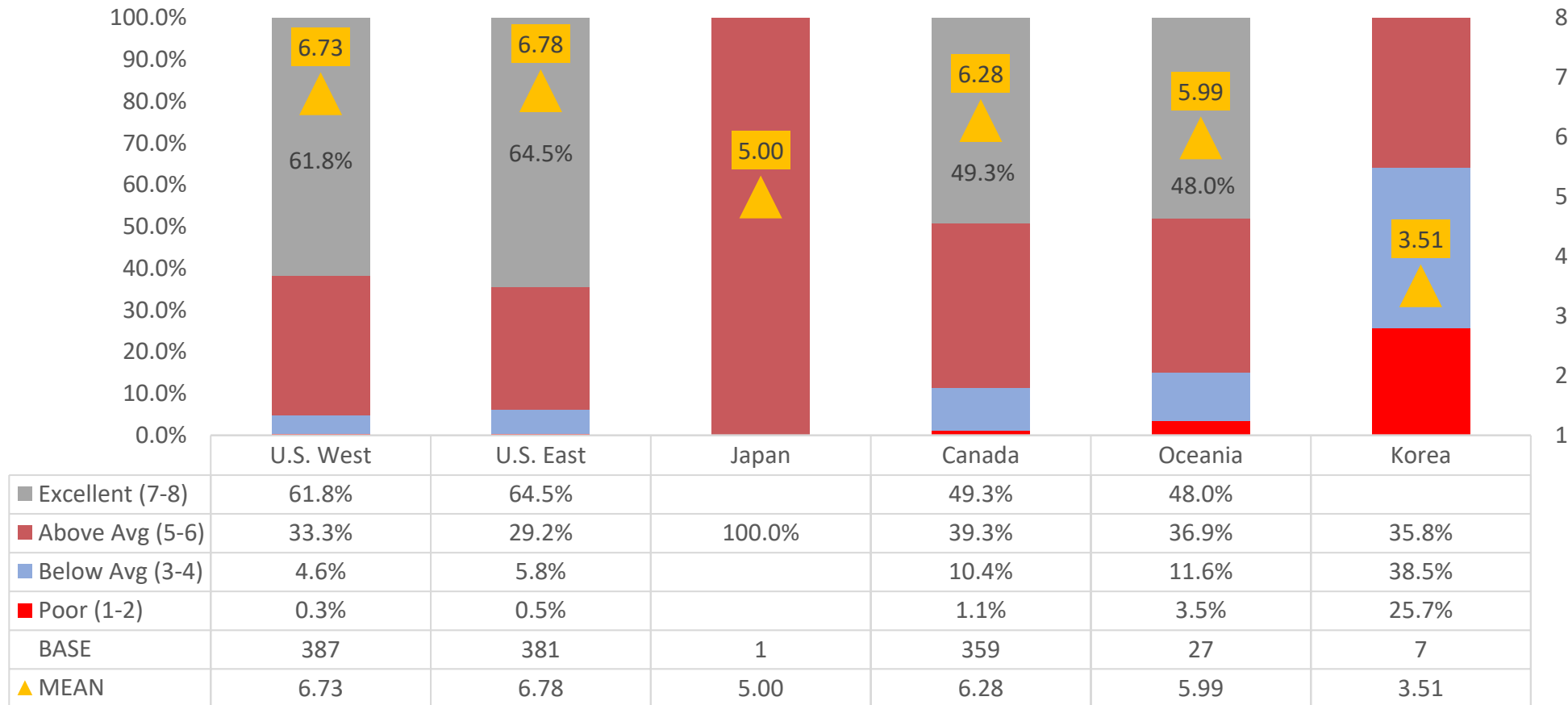
# ENTERTAINMENT/ ATTRACTIONS - MAUI

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



# SHOPPING - MAUI

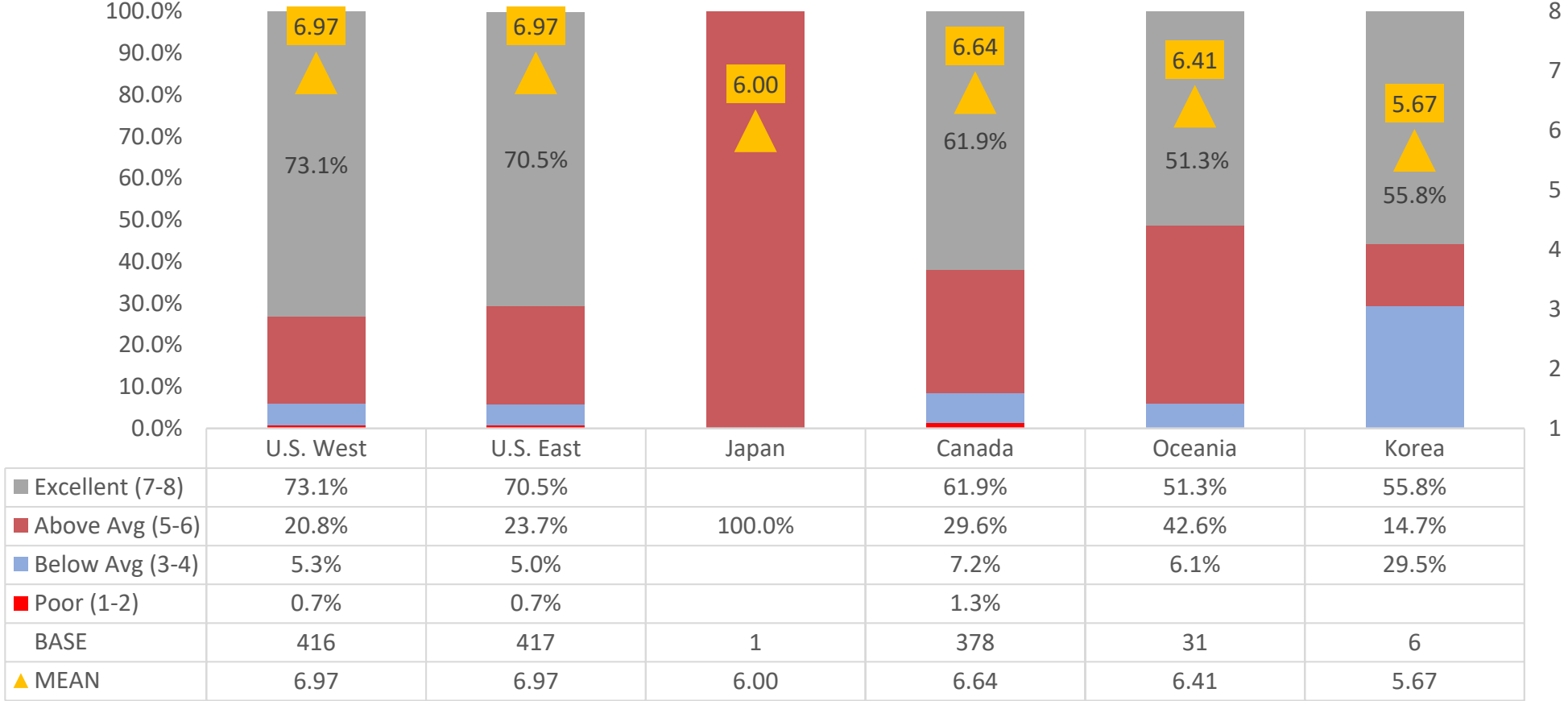
8-pt Rating Scale  
8=Excellent/ 1=Poor





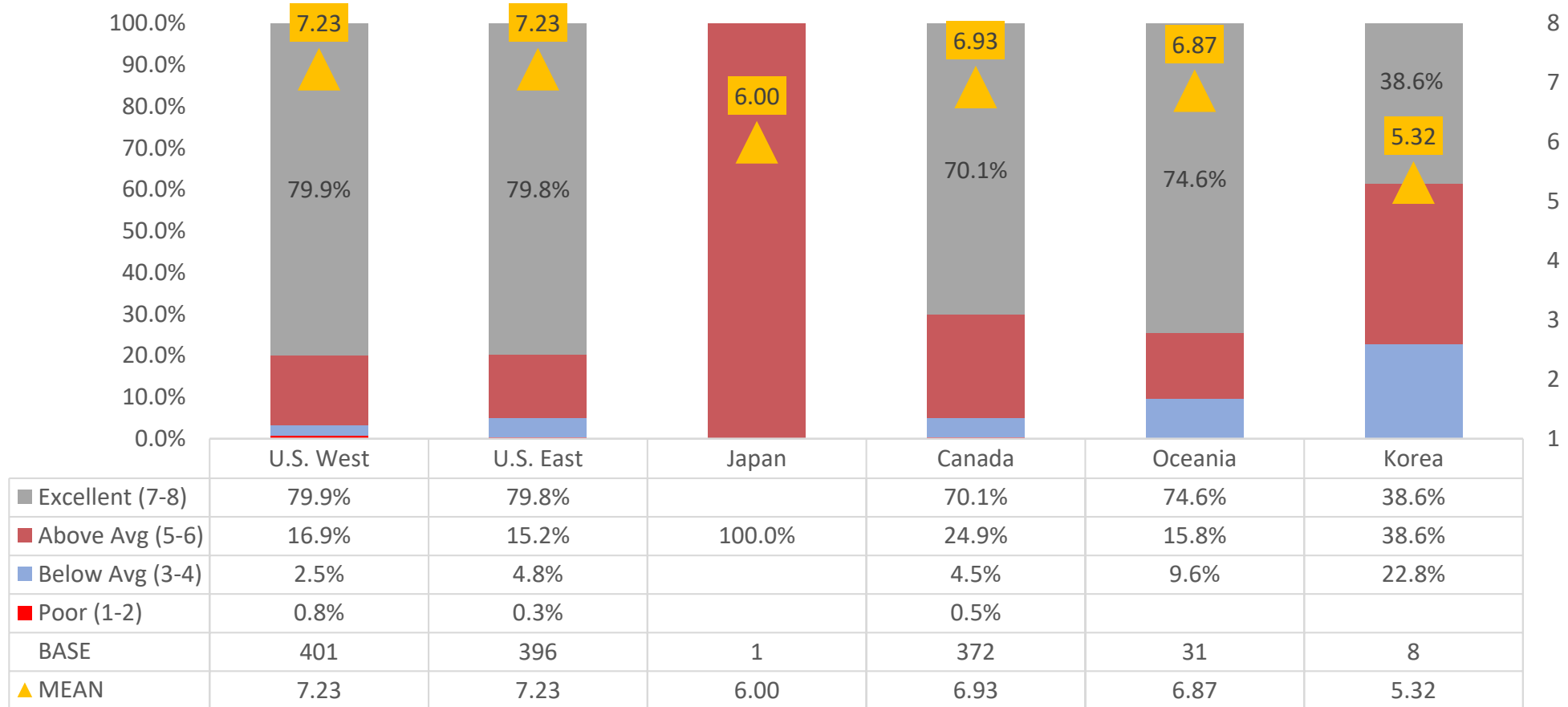
# DINING/ FOOD & BEVERAGE - MAUI

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



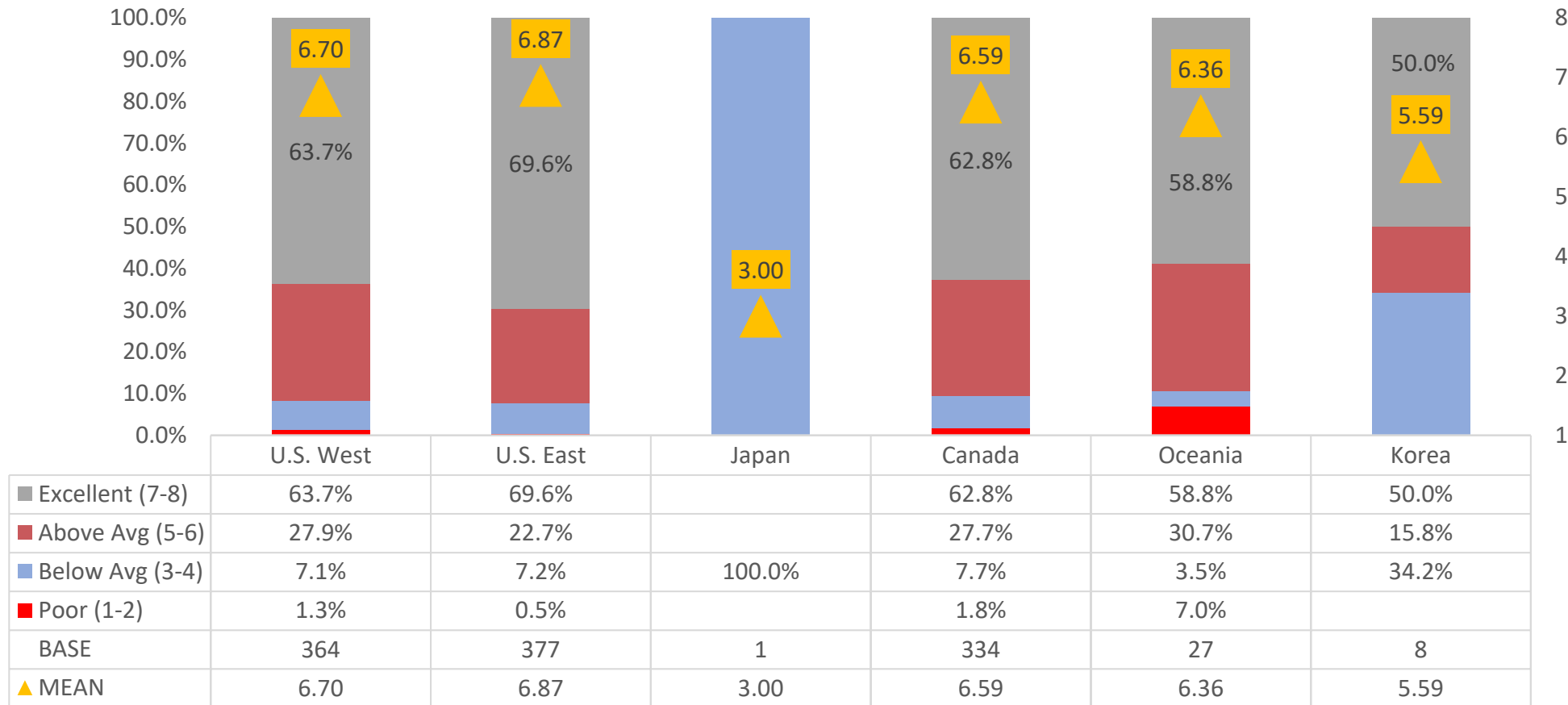
# LODGING/ ACCOMMODATIONS - MAUI

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



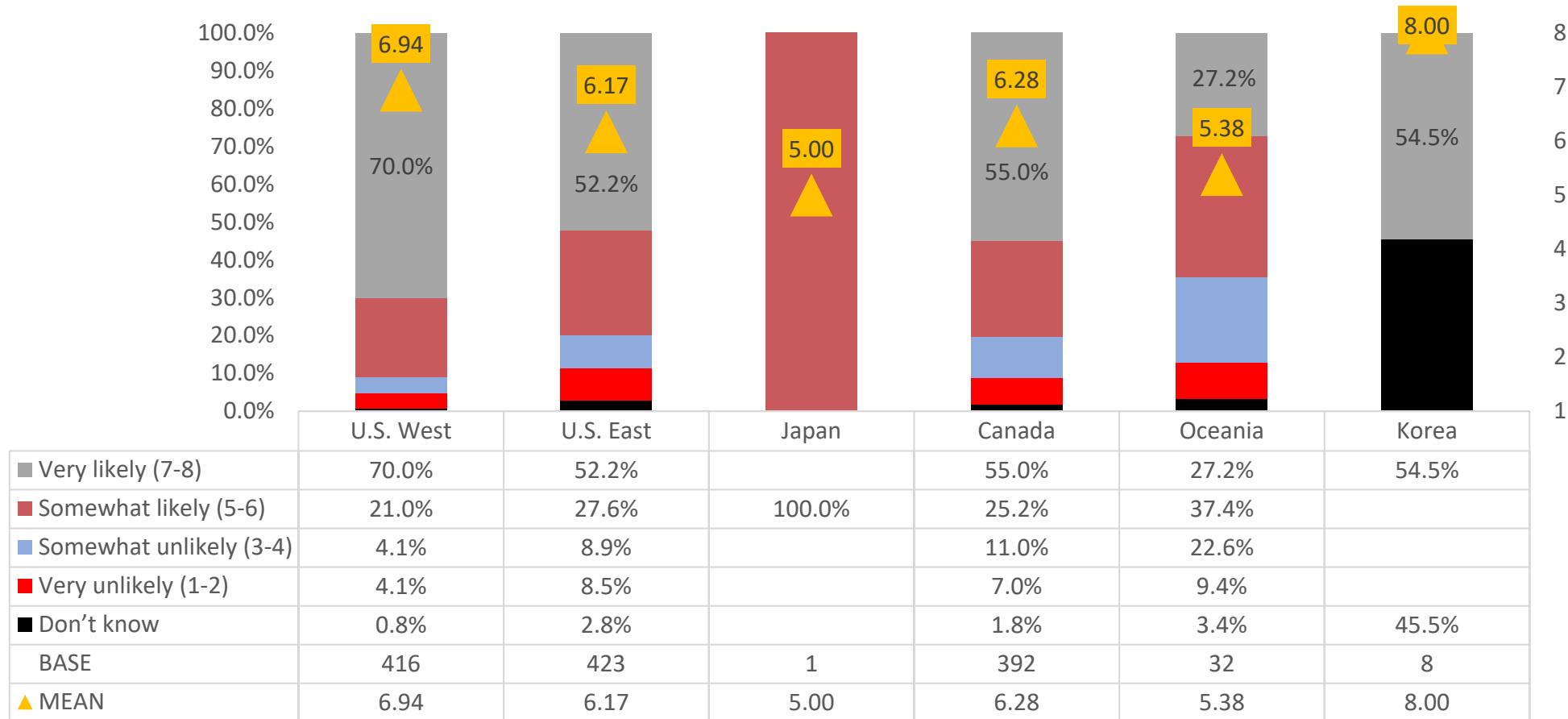
# TRANSPORTATION ON ISLAND - MAUI

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



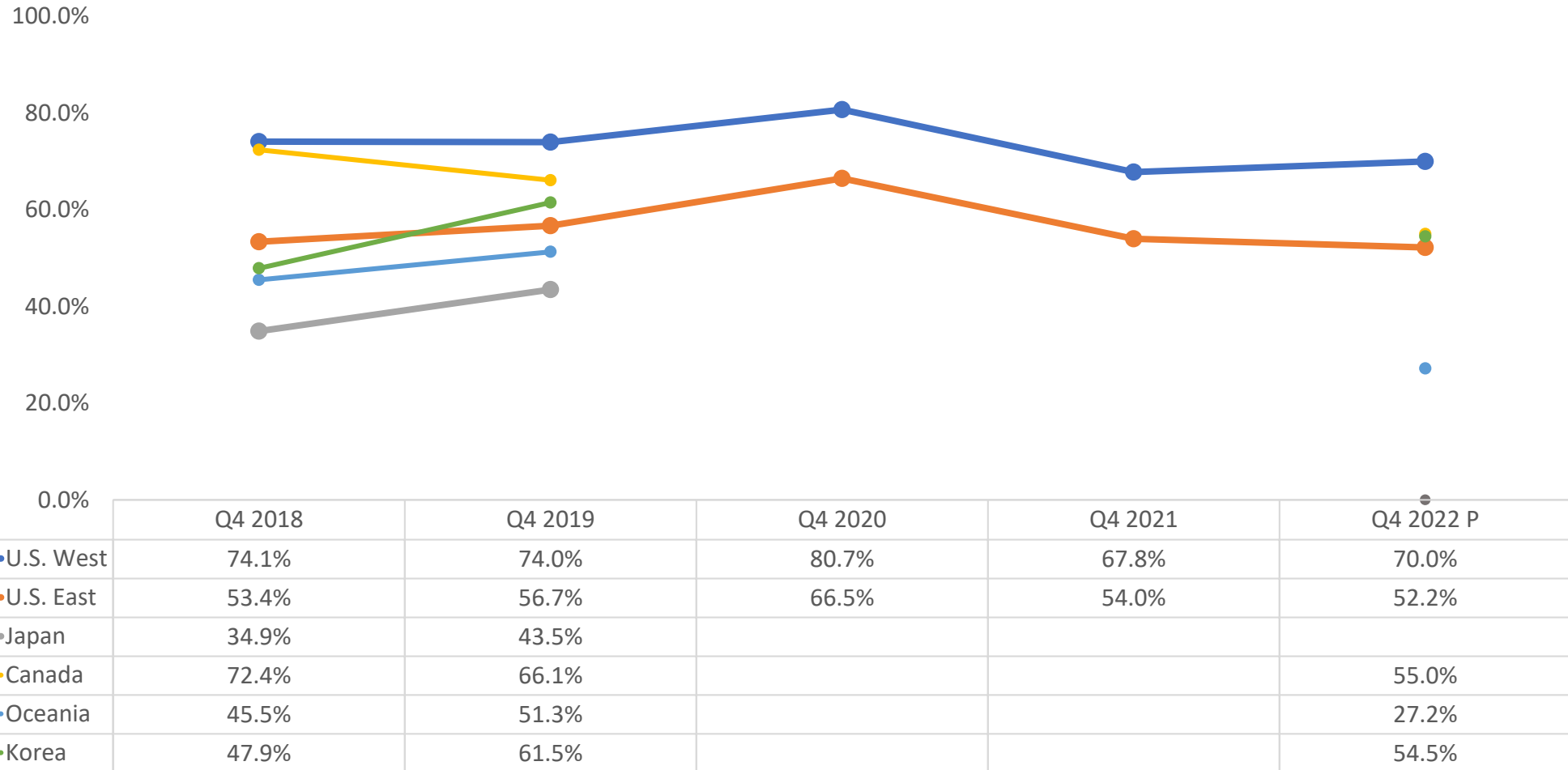
# LIKELIHOOD OF RETURN VISIT - MAUI

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

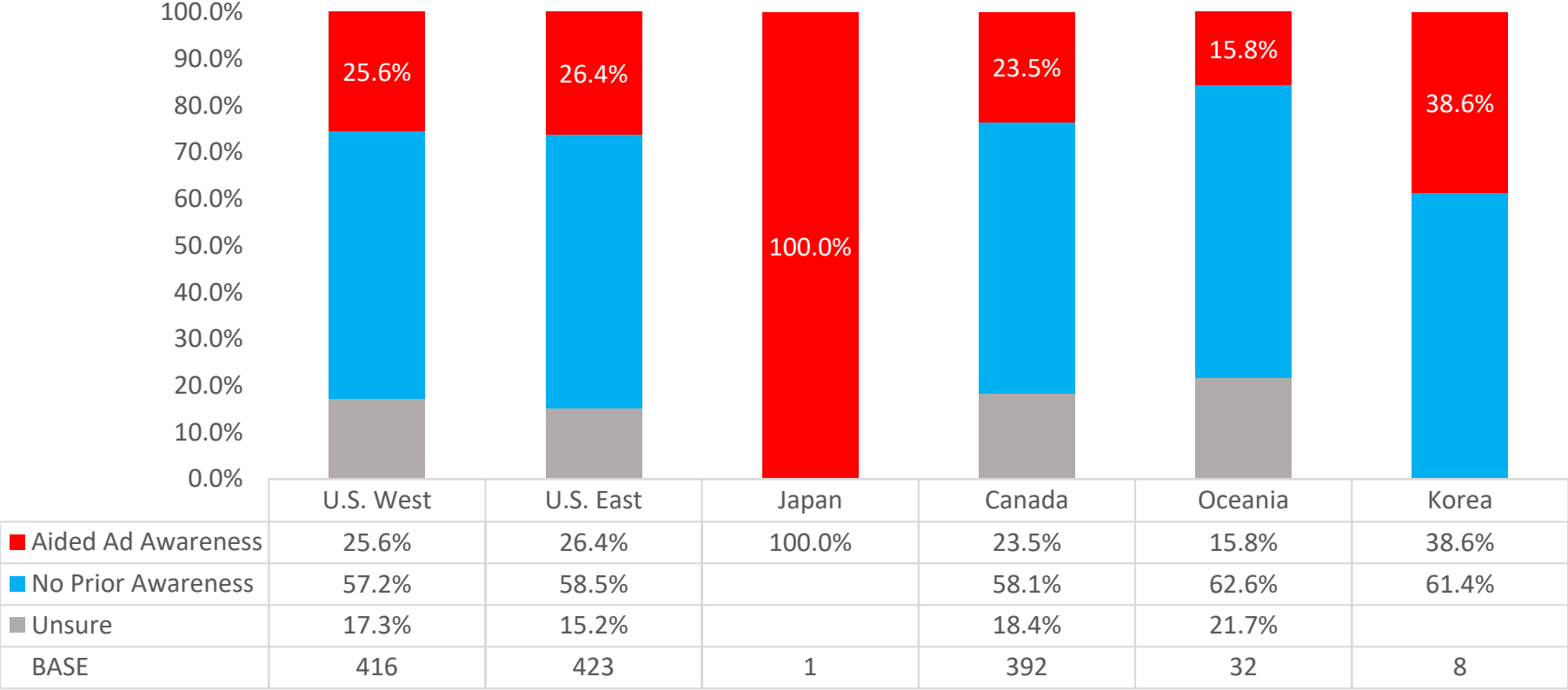


# LIKELIHOOD OF RETURN VISIT - MAUI (CONT.)

TOP BOX - VERY LIKELY (7-8)



# AIDED ADVERTISING AWARENESS - MAUI



# MOTIVATING FACTORS - MAUI

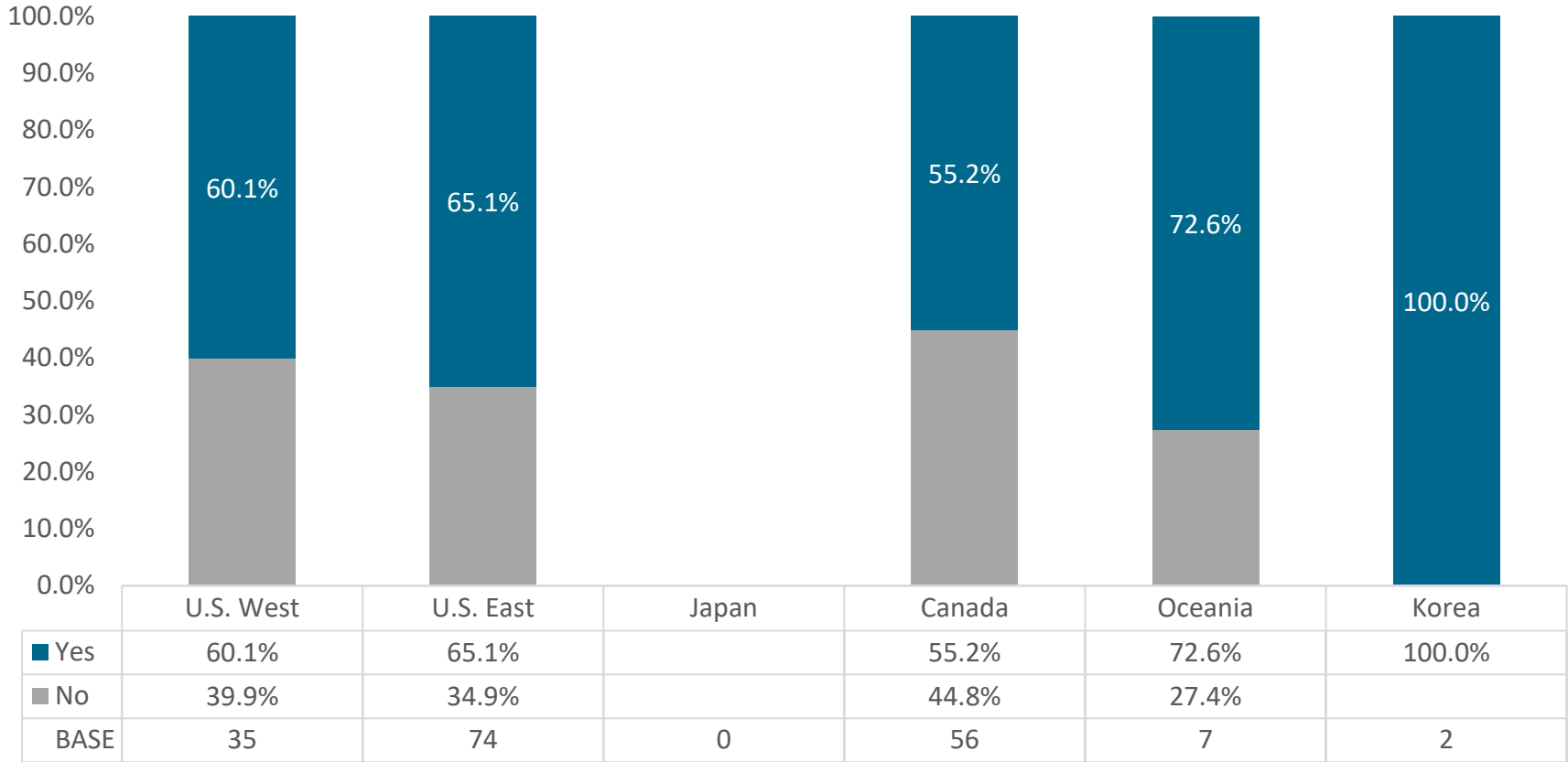
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Famous landmarks or imagery/ natural beauty</b>	35.0%	38.8%	100.0%	38.3%	46.8%	38.6%
<b>Outdoor or sporting activities/ events</b>	15.7%	18.2%	-	12.7%	8.9%	-
<b>Social media posts/ videos</b>	9.1%	11.2%	-	10.2%	12.8%	-
<b>Hawaiian cultural events</b>	7.0%	13.4%	-	7.1%	11.9%	-
<b>Hawaiian music</b>	7.1%	6.2%	-	4.4%	3.0%	-
<b>Television programs or movies filmed in Hawai'i</b>	4.0%	8.7%	-	6.2%	6.4%	22.8%
<b>BASE</b>	416	423	1	392	32	8

# ATTRACTIONS- MAUI

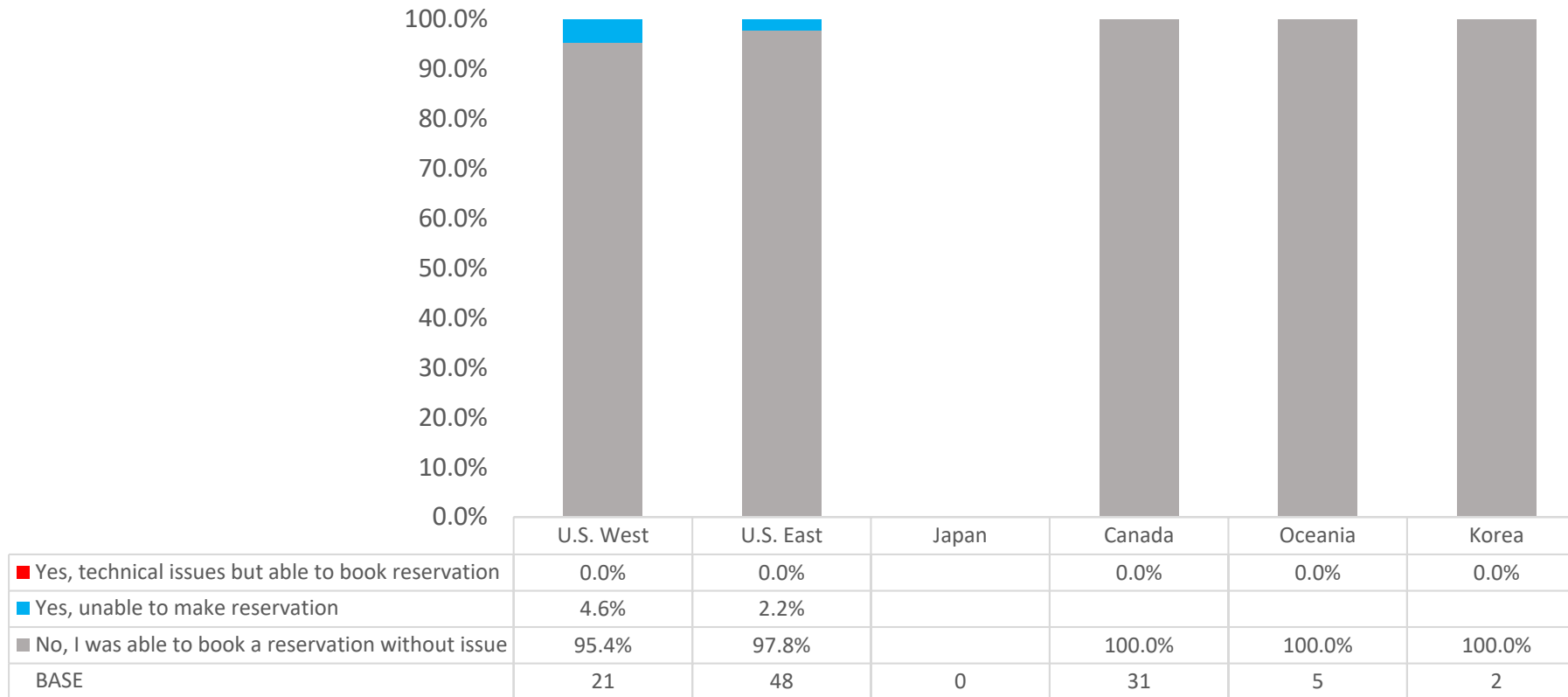
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Alexander & Baldwin Sugar Museum	2.7%	2.1%	0.0%	2.8%	0.0%	0.0%
Aquarium Maui /Maui Ocean Center	16.9%	13.1%	0.0%	17.9%	6.4%	15.8%
Baldwin Missionary Home Museum	5.3%	3.3%	0.0%	2.6%	3.0%	0.0%
Hale Pa'i Printing House	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%
Haleakala National Park	25.7%	39.7%	100.0%	38.2%	37.9%	45.5%
Haleki'i Pihana Heiau State Monument	1.7%	2.3%	0.0%	1.6%	3.4%	0.0%
Hana Cultural Center	7.0%	13.4%	0.0%	8.8%	15.3%	15.8%
'Iao Valley State Monument	6.4%	3.6%	100.0%	3.6%	3.0%	0.0%
Kepaniwai Park & Heritage Gardens	2.5%	4.6%	0.0%	4.3%	12.8%	0.0%
Kula Botanical Garden	8.7%	6.7%	0.0%	5.6%	9.4%	22.8%
Maui Historical Society Bailey House Museum	2.0%	1.7%	0.0%	1.1%	3.0%	15.8%
Wainapanapa State Park	8.5%	17.4%	0.0%	14.0%	21.7%	27.2%
Whaler's Village Museum	13.3%	17.8%	0.0%	10.1%	5.9%	22.8%
Wo Hing Temple Museum	1.4%	0.9%	0.0%	0.5%	3.0%	0.0%



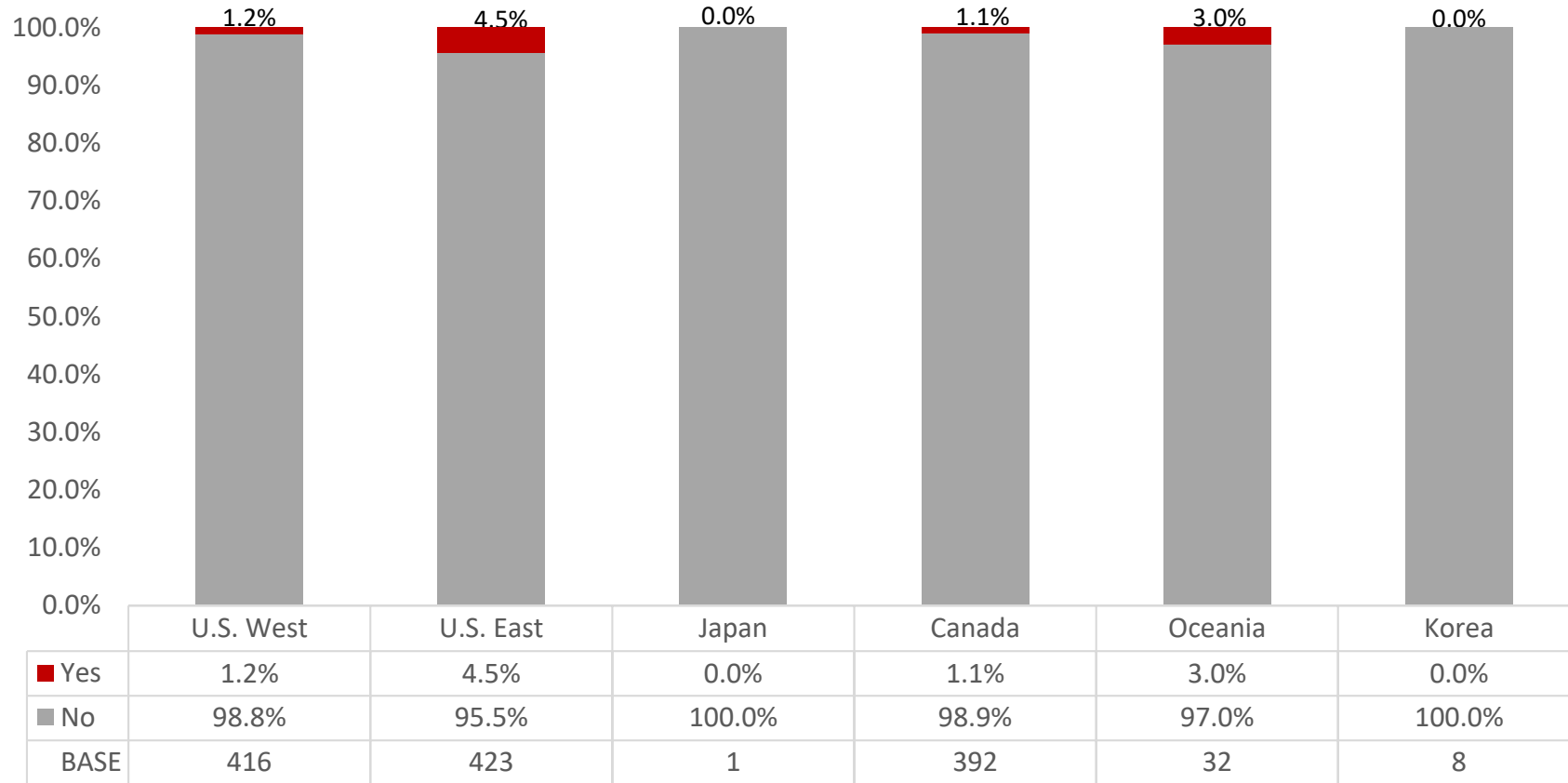
# WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



# WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



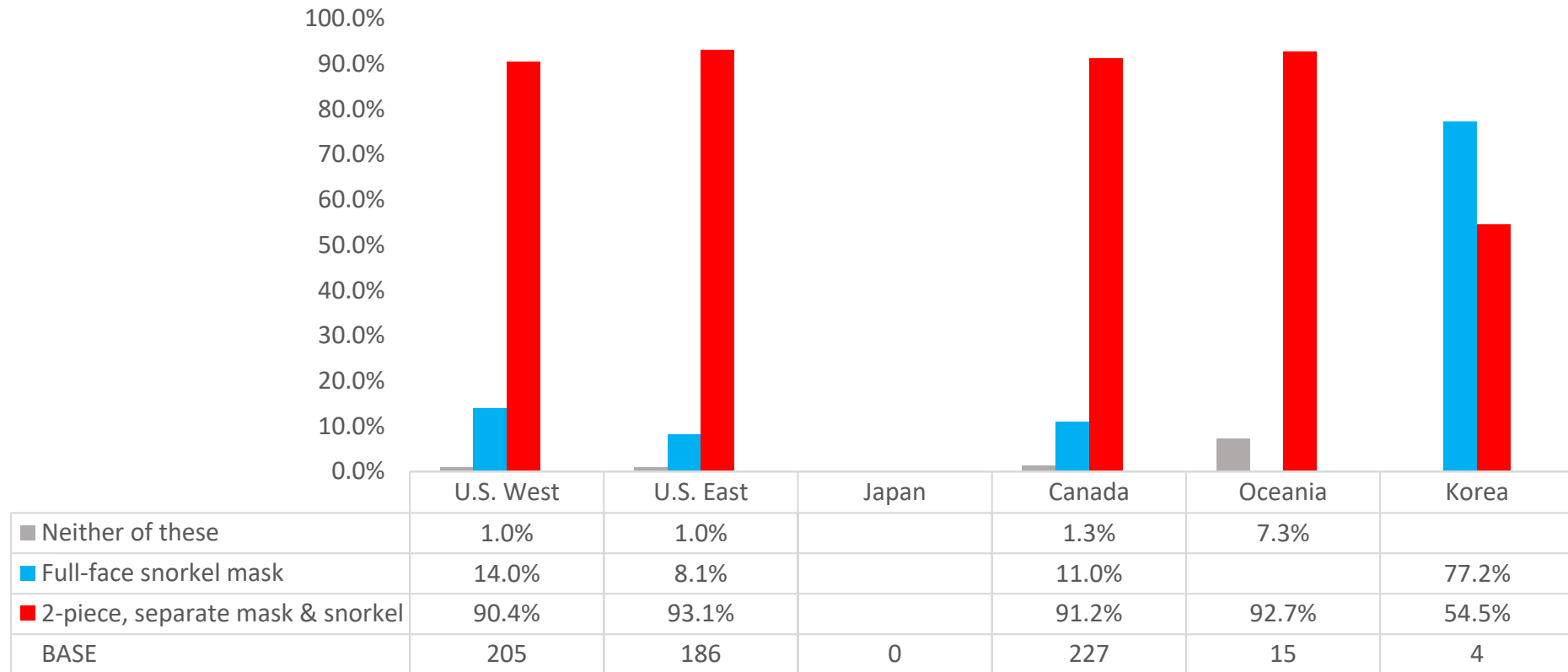
# VISITED MAUI FOR SPECIFIC EVENT



# VISITED MAUI FOR SPECIFIC EVENT (CONT.)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>Other sporting events</b>	60.0%	74.2%	-	50.0%	-	-
<b>Wedding/ honeymoon/ anniversary/ birthday/ funeral/ graduation</b>	20.0%	20.8%	-	25.0%	-	-
<b>Sentry Tournament of Golf Champions</b>	20.0%	-	-	25.0%	-	-
<b>Hawaii Food and Wine Festival</b>	-	5.0%	-	-	-	-
<b>American Windsurfing Tour</b>	-	-	-	-	100.0%	-
<b>BASE</b>	5	19	0	4	1	0

# SNORKELING EQUIPMENT USED - MAUI



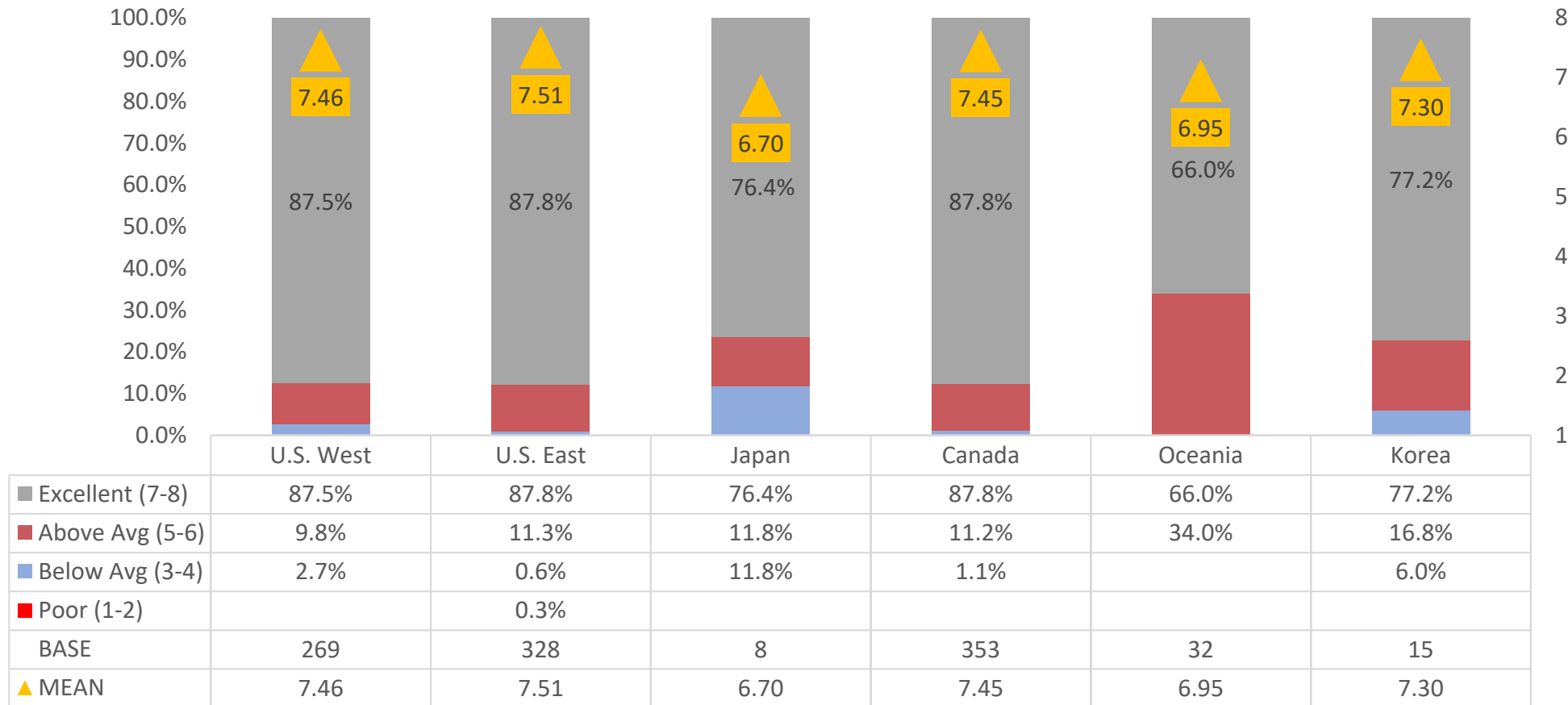
# SNORKELING OCEAN SAFETY- MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	98.6%	96.8%	-	98.7%	100.0%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	1.4%	3.2%	-	1.3%	-	-
Yes, while snorkeling using a full face snorkel mask	-	-	-	-	-	-
<b>BASE</b>	203	184	0	224	14	4

# Section 8 – ISLAND OF HAWAII

# SATISFACTION - ISLAND OF HAWAI'I

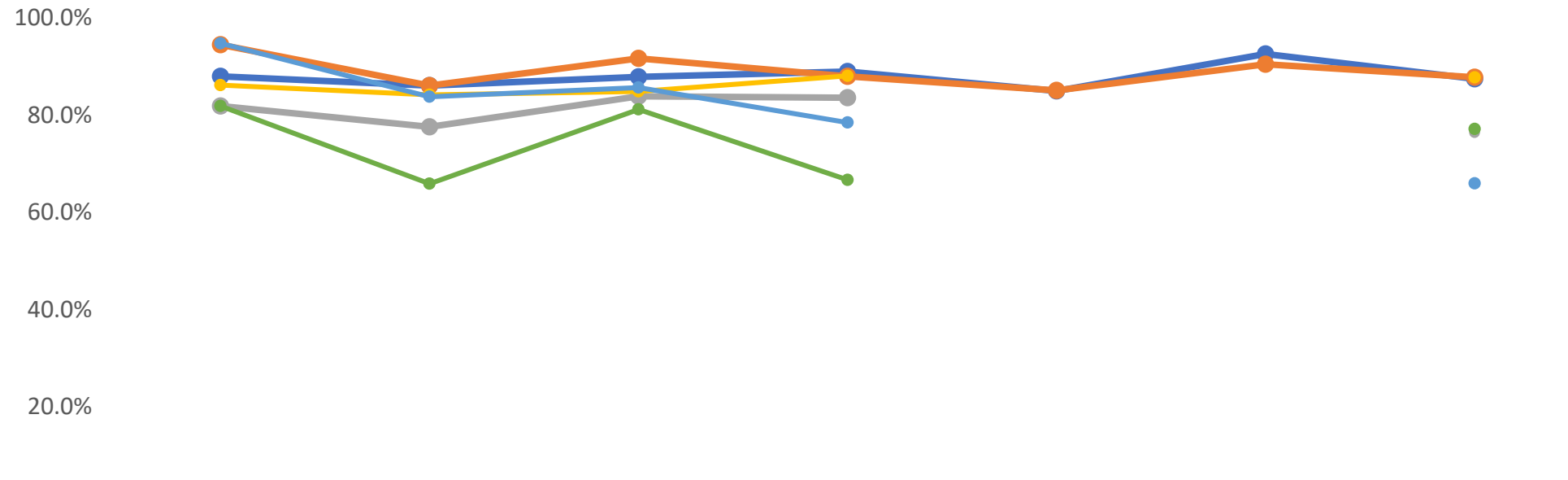
8-pt Rating Scale  
8=Excellent/ 1=Poor





# SATISFACTION - ISLAND OF HAWAI'I (CONT.)

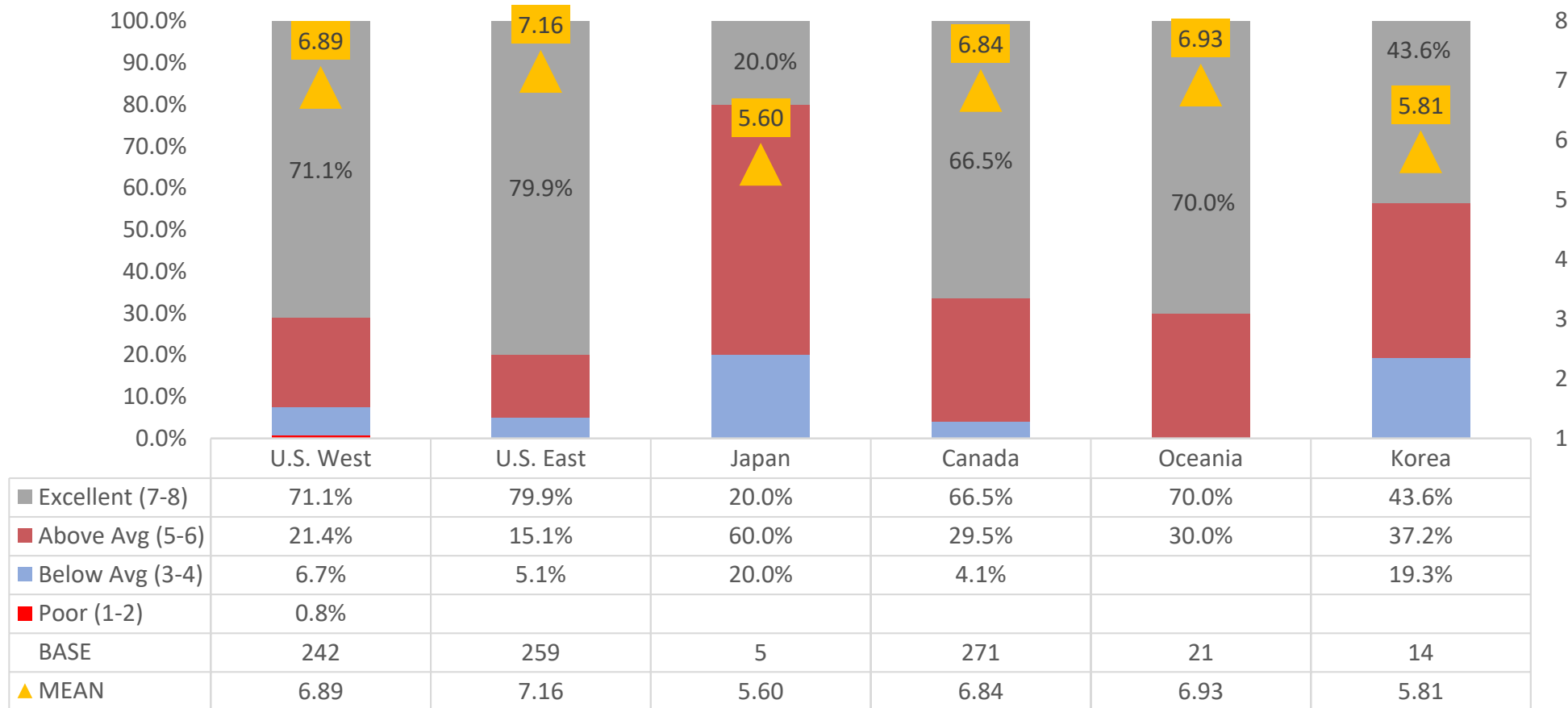
Tracking Data – Rating of “Excellent” (7-8)



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022 P
U.S. West	88.0%	86.1%	87.9%	89.0%	85.0%	92.6%	87.5%
U.S. East	94.5%	86.1%	91.7%	88.0%	85.1%	90.5%	87.8%
Japan	81.9%	77.6%	83.9%	83.6%			76.4%
Canada	86.2%	84.2%	84.9%	88.1%			87.8%
Oceania	94.8%	83.8%	85.7%	78.5%			66.0%
Korea	81.9%	65.9%	81.2%	66.7%			77.2%

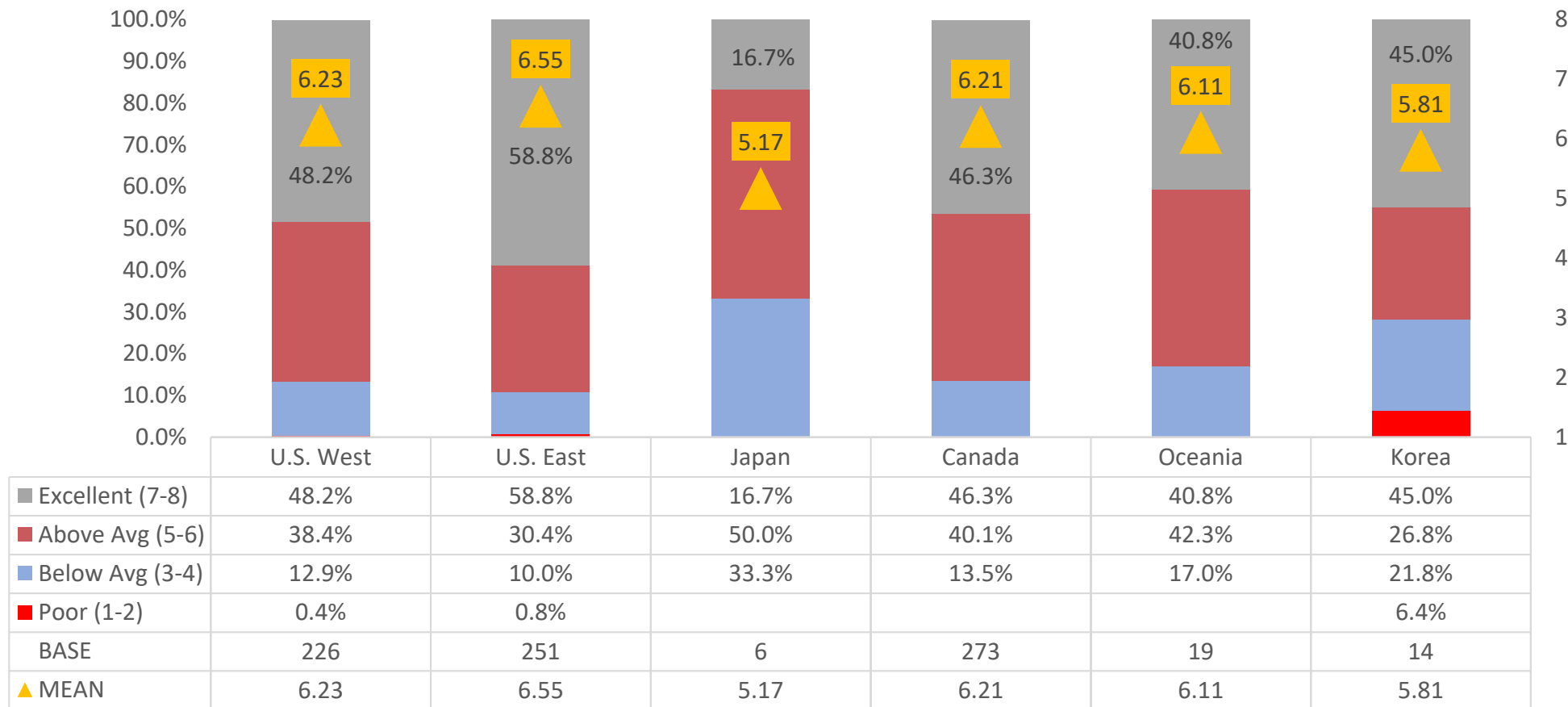
# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



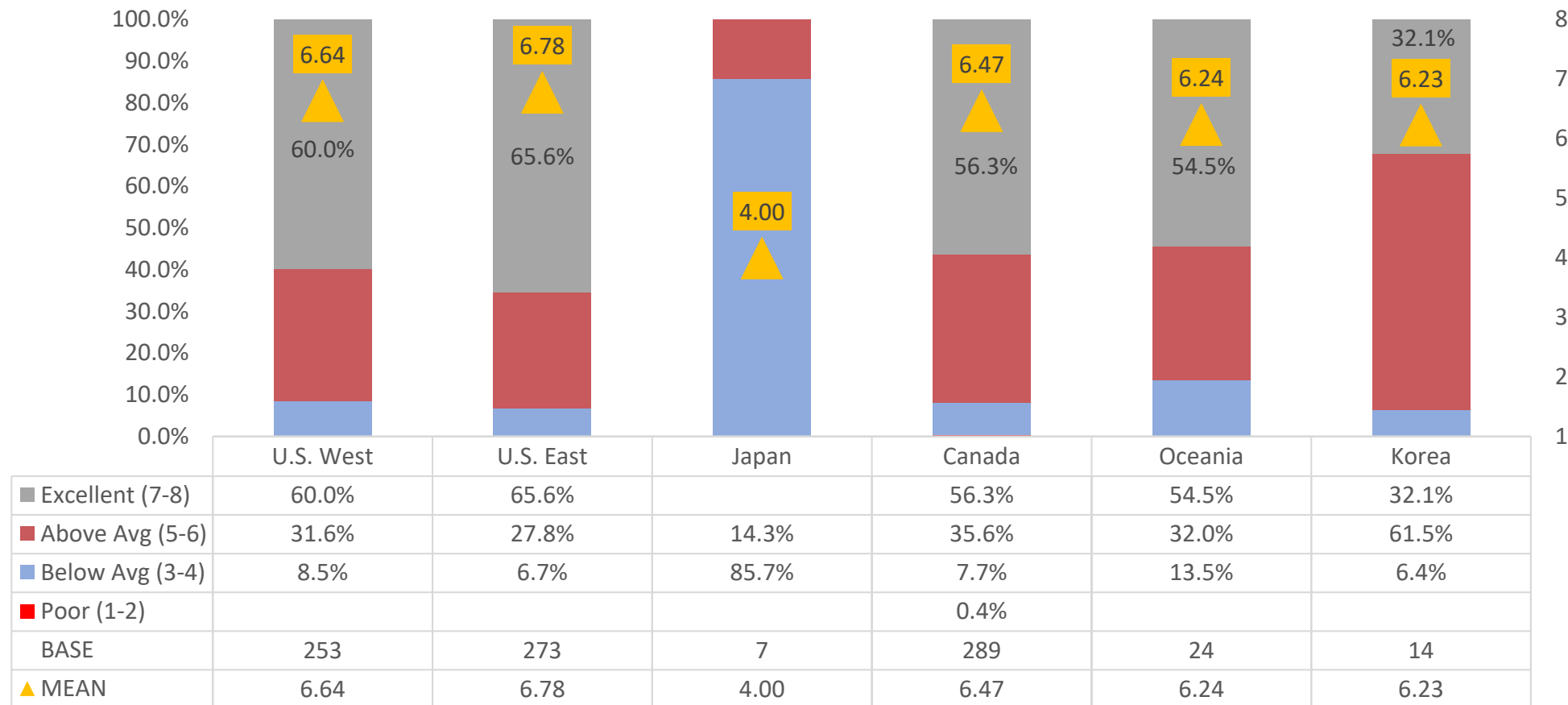
# SHOPPING - ISLAND OF HAWAI'I

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



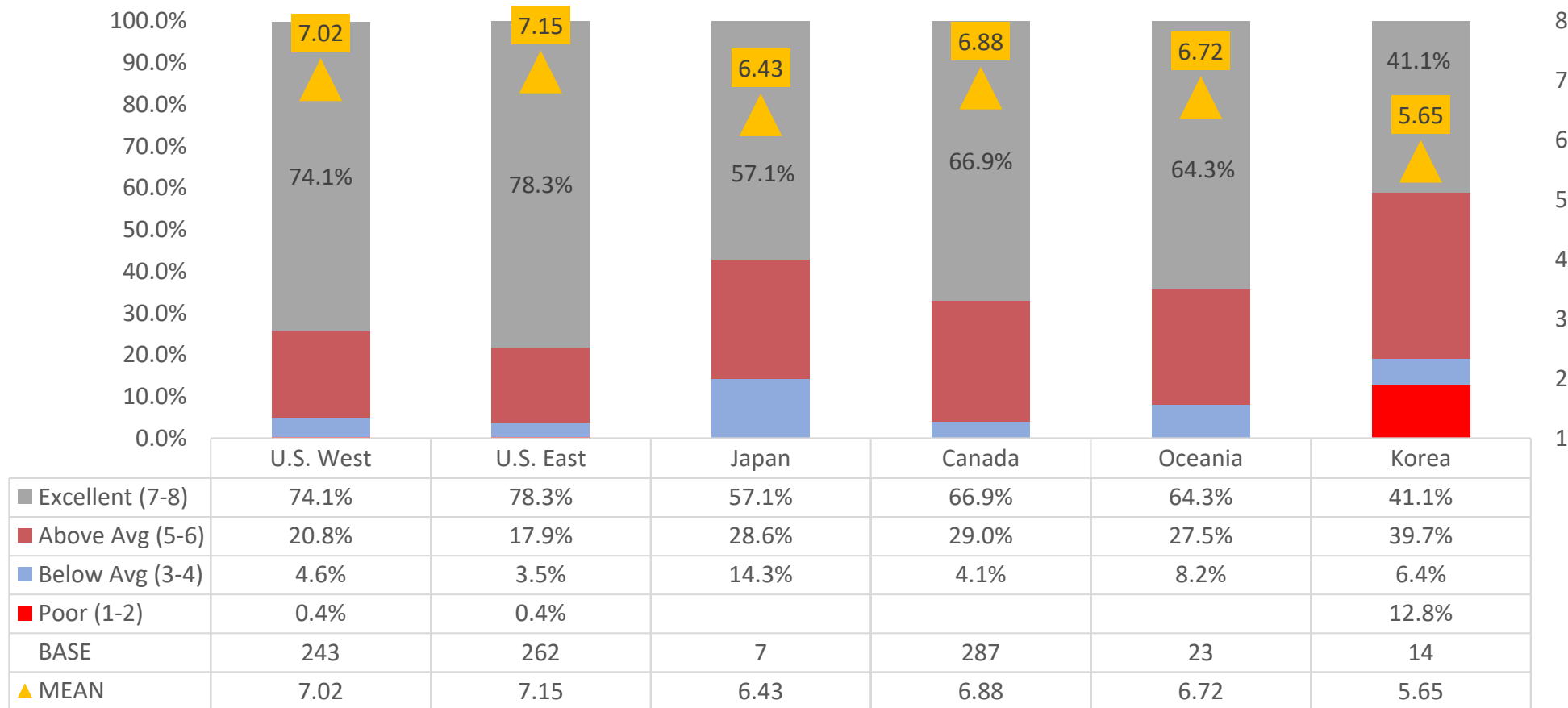
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



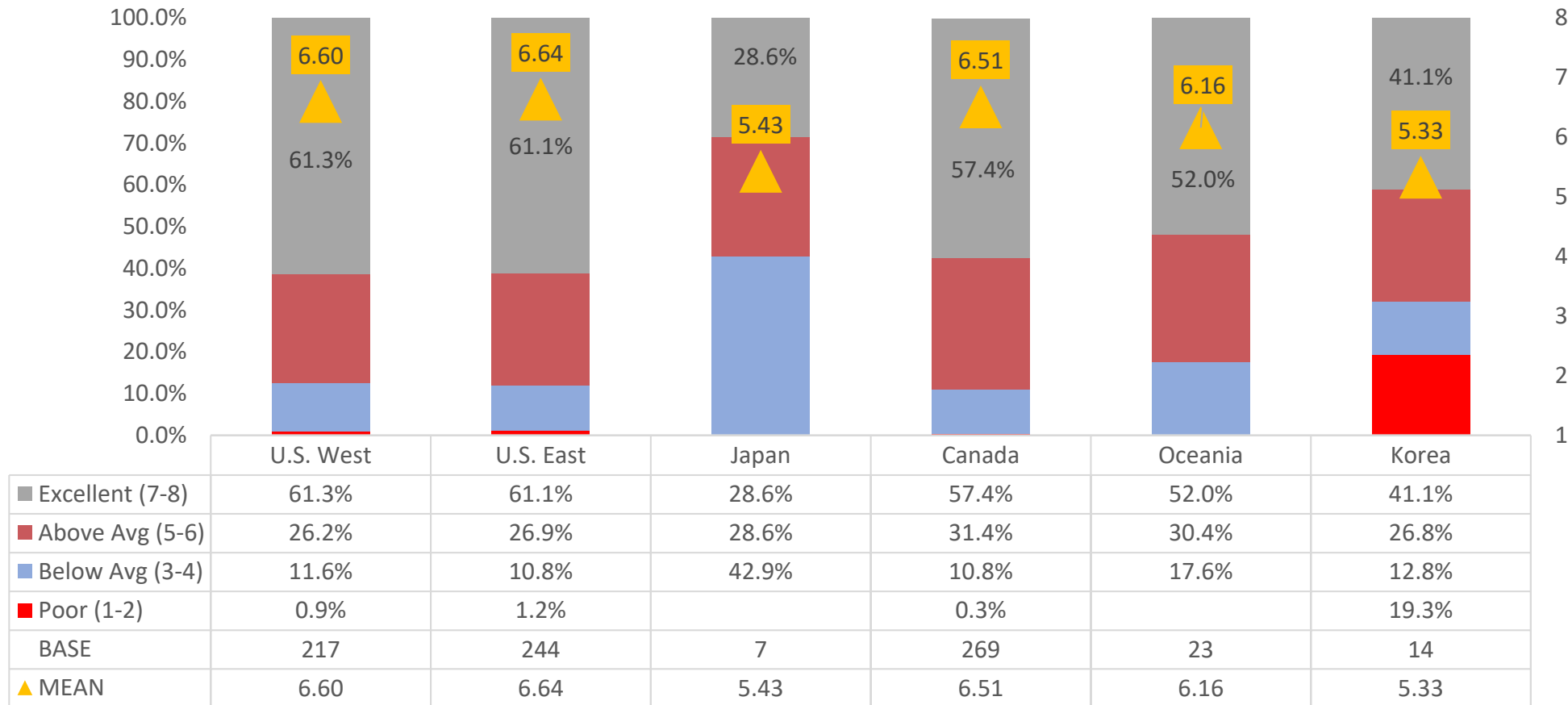
# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



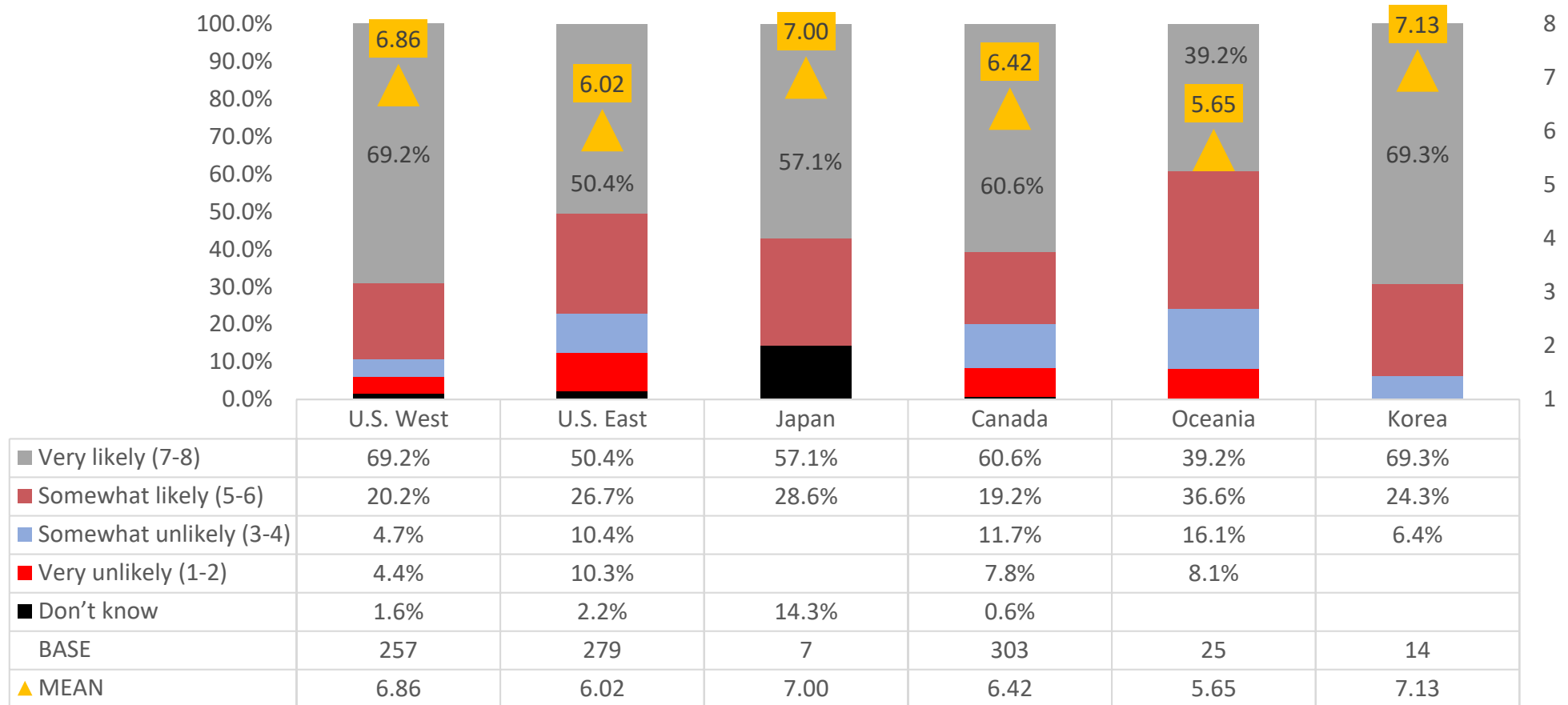
# TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



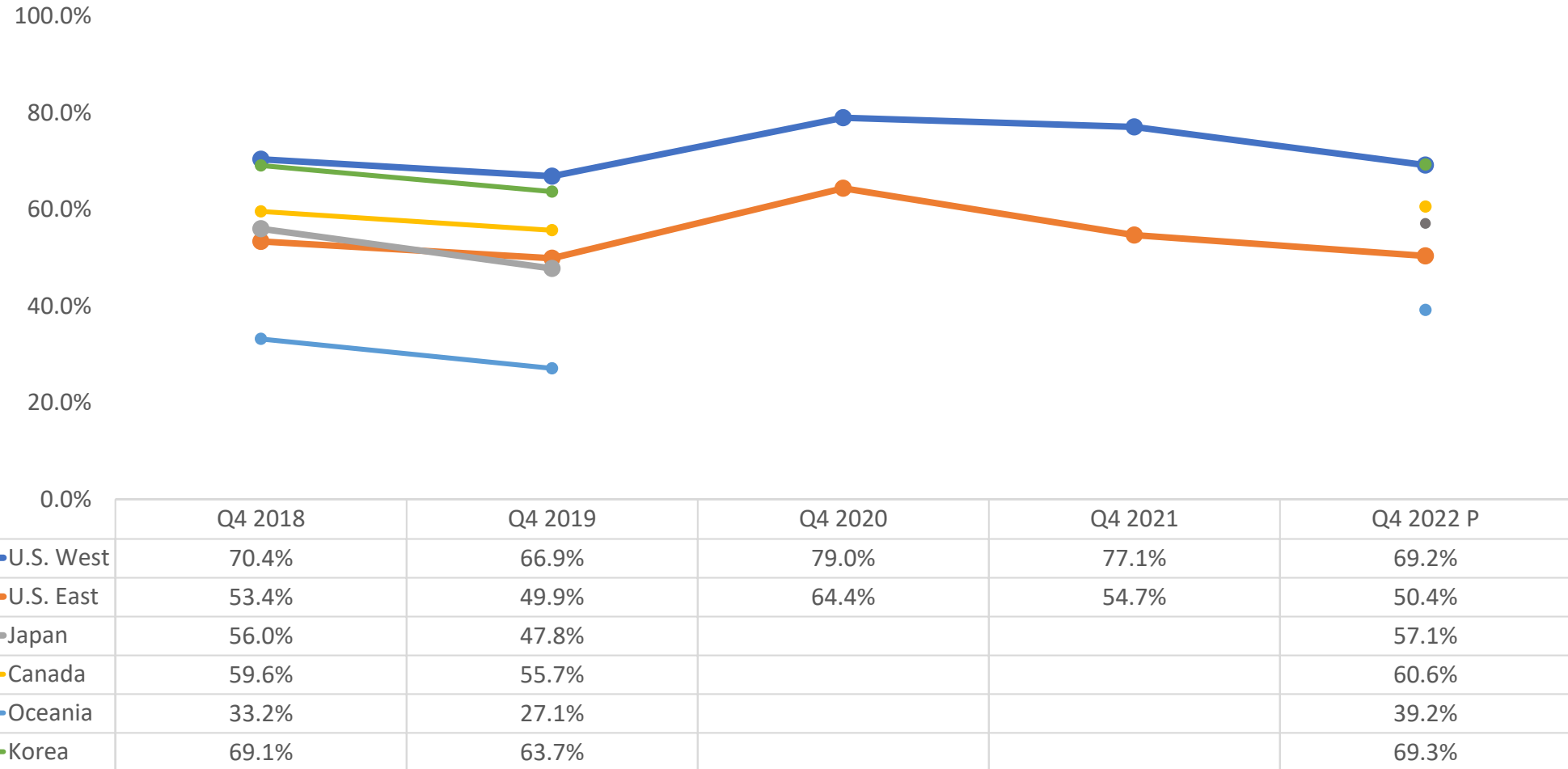
# LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

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



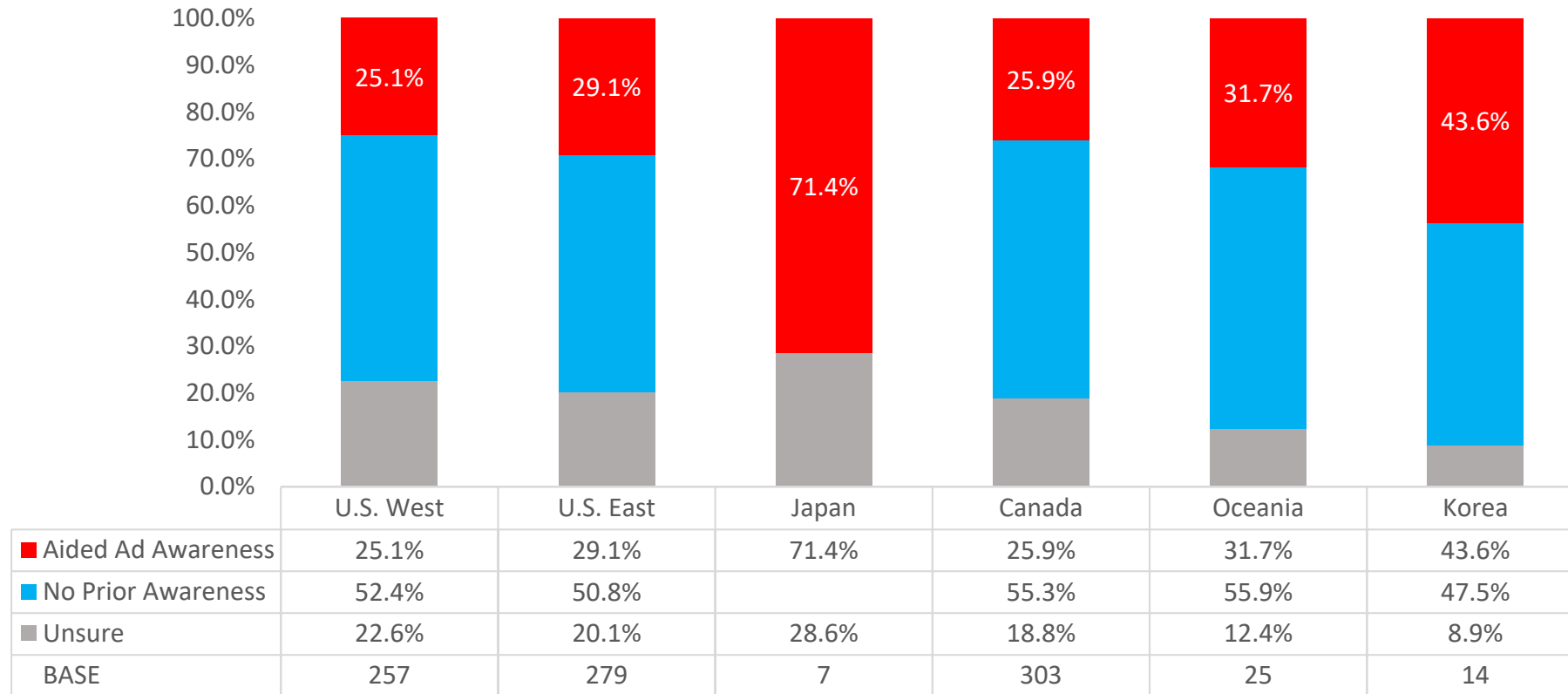
# LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I (CONT.)

TOP BOX - VERY LIKELY (7-8)





# 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	46.1%	57.5%	57.1%	45.3%	52.2%	25.7%
Outdoor or sporting activities/ events	20.1%	18.0%	14.3%	21.5%	15.6%	-
Hawaiian cultural events	11.3%	13.9%	-	9.8%	12.4%	-
Social media posts/ videos	7.0%	6.1%	14.3%	6.2%	16.7%	19.3%
Hawaiian music	7.7%	10.2%	14.3%	6.0%	3.8%	17.9%
Television programs or movies filmed in Hawai'i	4.3%	8.6%	14.3%	10.9%	11.8%	-
BASE	257	279	7	303	25	14

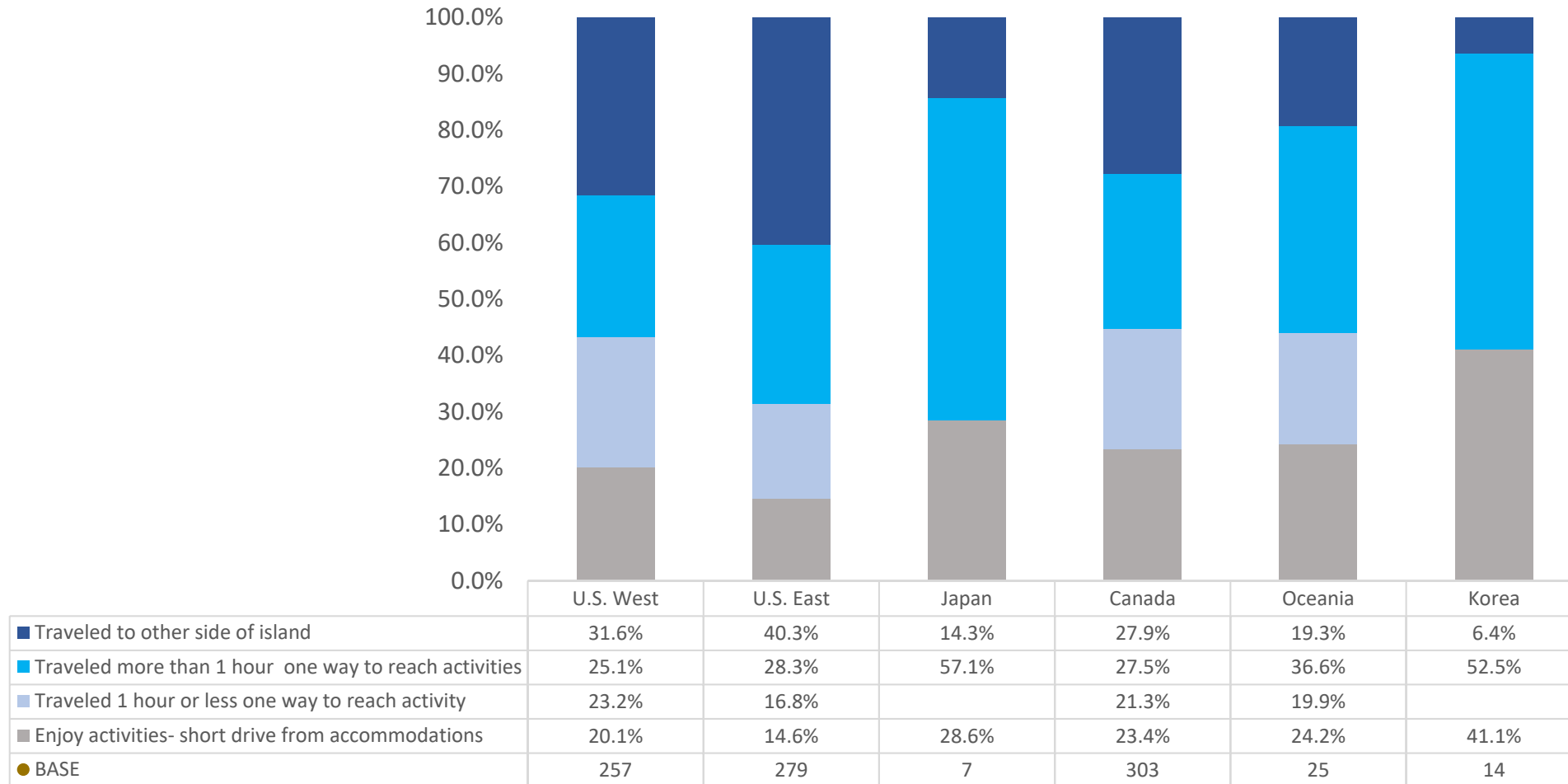
# ATTRACTIONS- ISLAND OF HAWAI'I (1/2)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
<b>'Akaka Falls</b>	30.2%	33.1%	28.6%	24.8%	16.1%	0.0%
<b>Botanical Gardens</b>	18.2%	24.6%	0.0%	18.3%	20.4%	0.0%
<b>H.N. Greenwell Store</b>	2.7%	4.0%	0.0%	4.3%	3.8%	17.9%
<b>Hawai'i Volcanoes National Park</b>	55.1%	71.5%	57.1%	57.9%	64.5%	47.5%
<b>Hilo Farmers Market</b>	25.3%	25.1%	0.0%	25.8%	20.4%	0.0%
<b>Hulihe'e Palace</b>	3.1%	4.3%	0.0%	5.4%	0.0%	0.0%
<b>'Imiloa Astronomy Ctr</b>	1.9%	3.7%	0.0%	1.6%	0.0%	8.9%
<b>Kaloko Honokohau National Historical Park</b>	8.6%	11.9%	14.3%	8.7%	8.6%	0.0%
<b>Kona Coffee Living History Farm</b>	9.0%	19.4%	14.3%	16.2%	11.8%	53.9%
<b>Lili'uokalani Park and Garden</b>	10.4%	6.5%	14.3%	6.3%	8.1%	0.0%

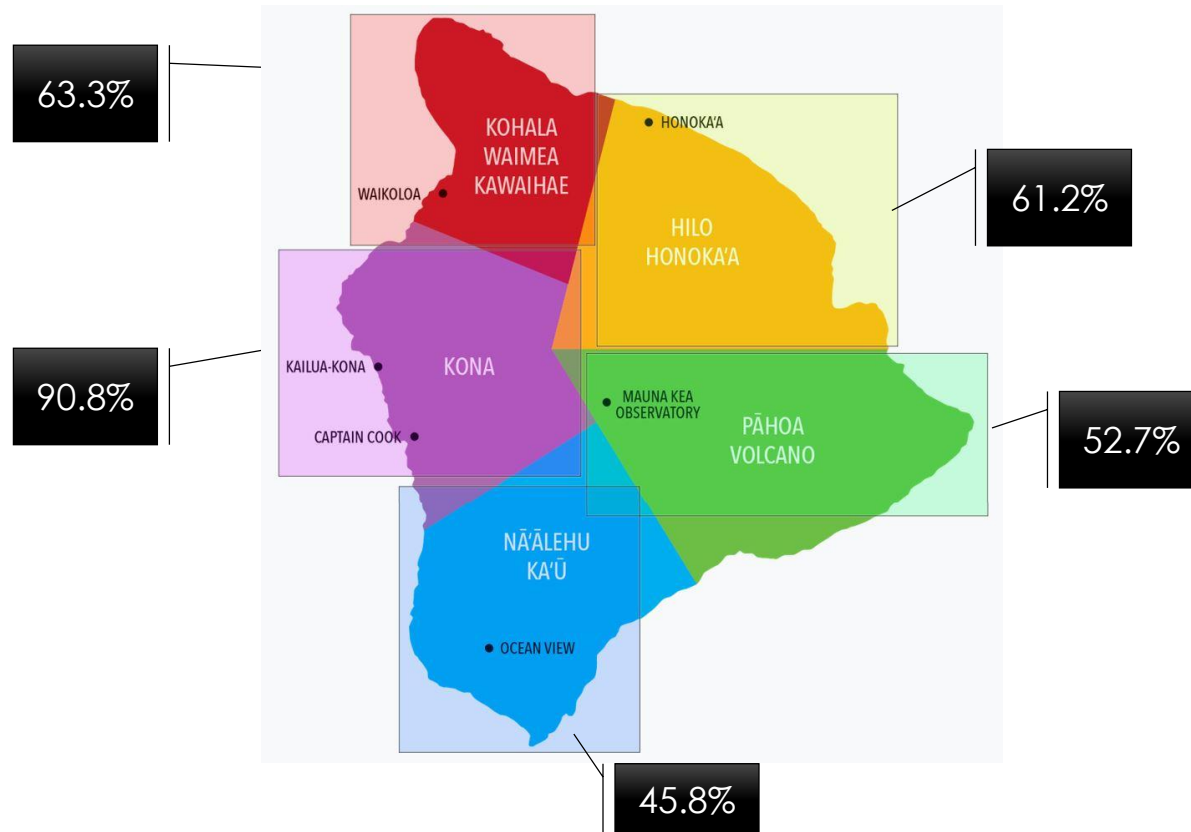
# ATTRACTIONS- ISLAND OF HAWAI'I (2/2)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Lyman House Memorial Museum	1.9%	2.2%	0.0%	0.3%	0.0%	0.0%
Maunakea Visitor Ctr/ Summit	17.2%	19.9%	14.3%	17.1%	16.1%	21.8%
Orchid Farm	1.6%	2.9%	0.0%	1.7%	0.0%	0.0%
Pacific Tsunami Museum	3.4%	4.3%	0.0%	1.3%	3.8%	8.9%
Pana'ewa Rainforest Zoo & Garden	5.5%	2.2%	0.0%	1.7%	0.0%	0.0%
Pu'uhonua o Honaunau National Historical Park	16.3%	19.6%	14.3%	19.8%	4.3%	0.0%
Pu'ukohola Heia National Historical Site	13.6%	10.9%	14.3%	7.0%	0.0%	0.0%
Punalu'u Black Sand Beach	27.6%	43.9%	28.6%	33.6%	31.7%	15.4%
Rainbow Falls	27.5%	33.6%	28.6%	26.8%	39.2%	41.1%
Volcano Art Center	9.7%	11.6%	0.0%	8.1%	28.0%	8.9%

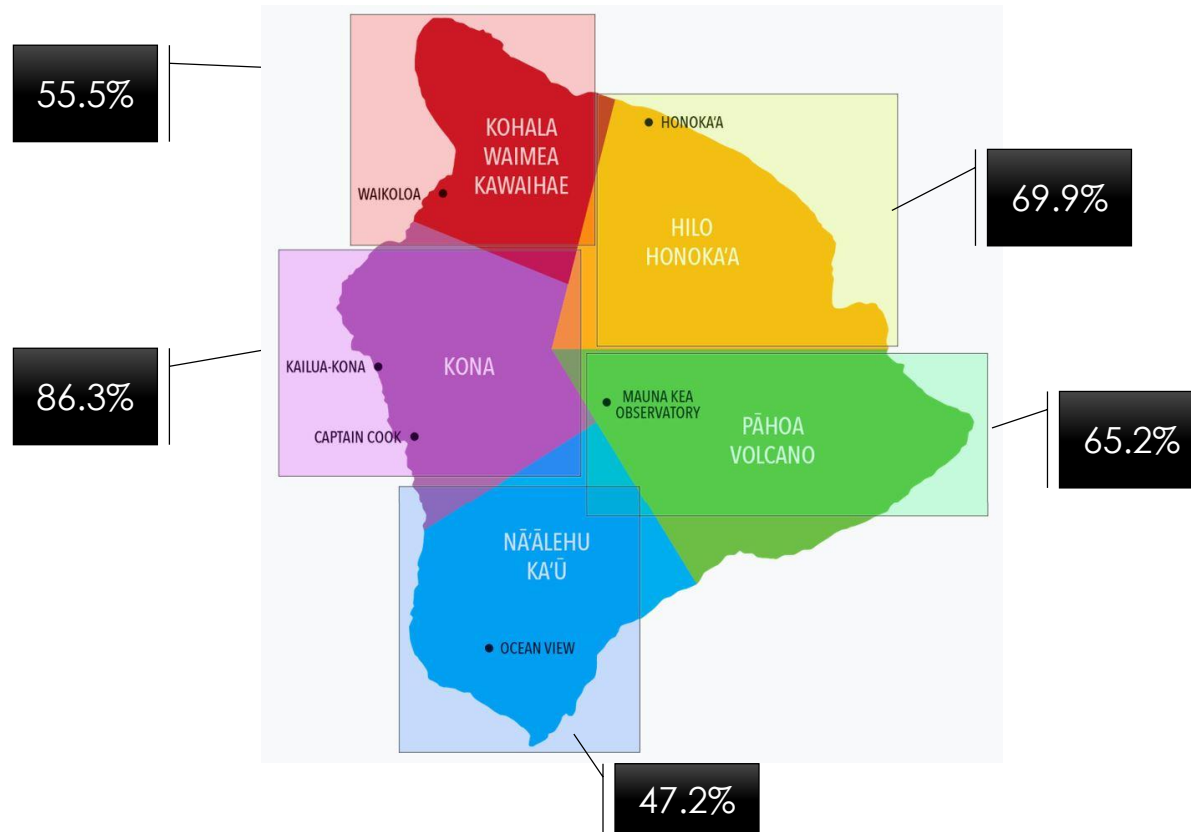
# TRAVEL ON ISLAND OF HAWAI'I



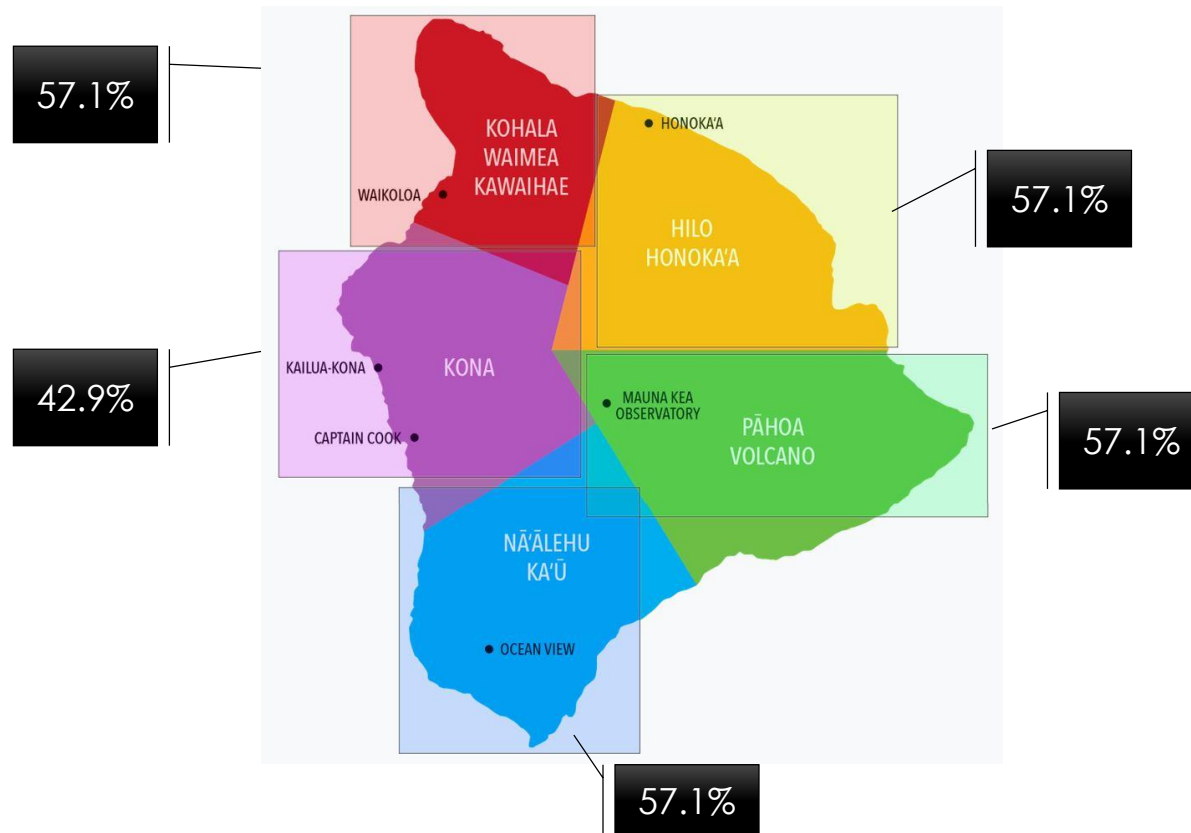
# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



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

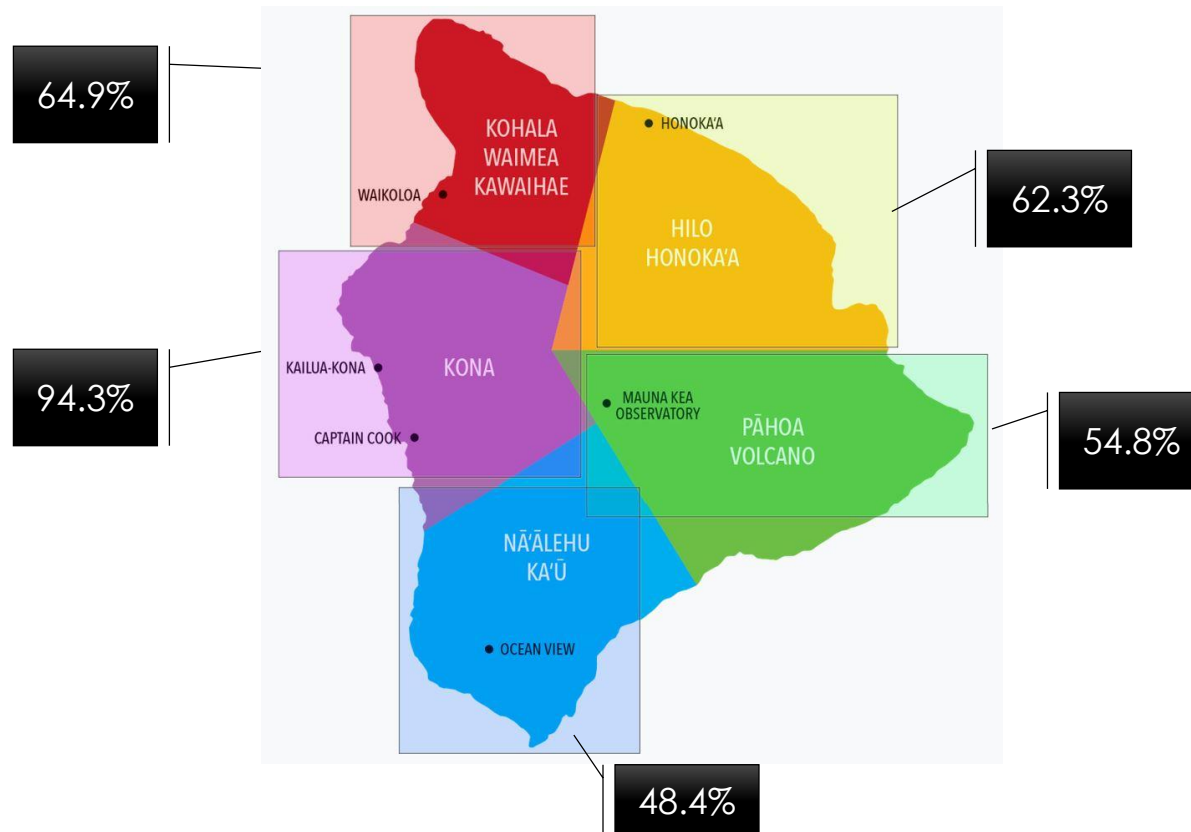


# AREAS VISITED ISLAND OF HAWAI'I JAPAN

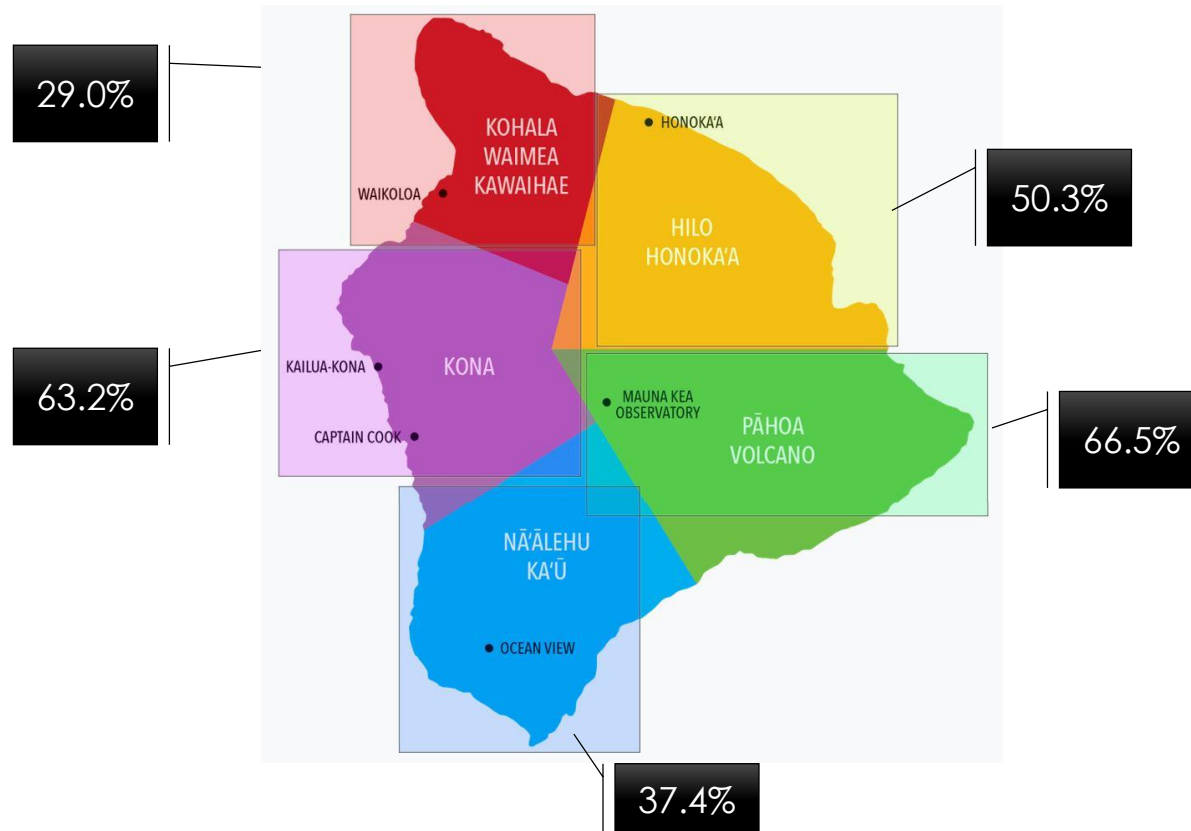




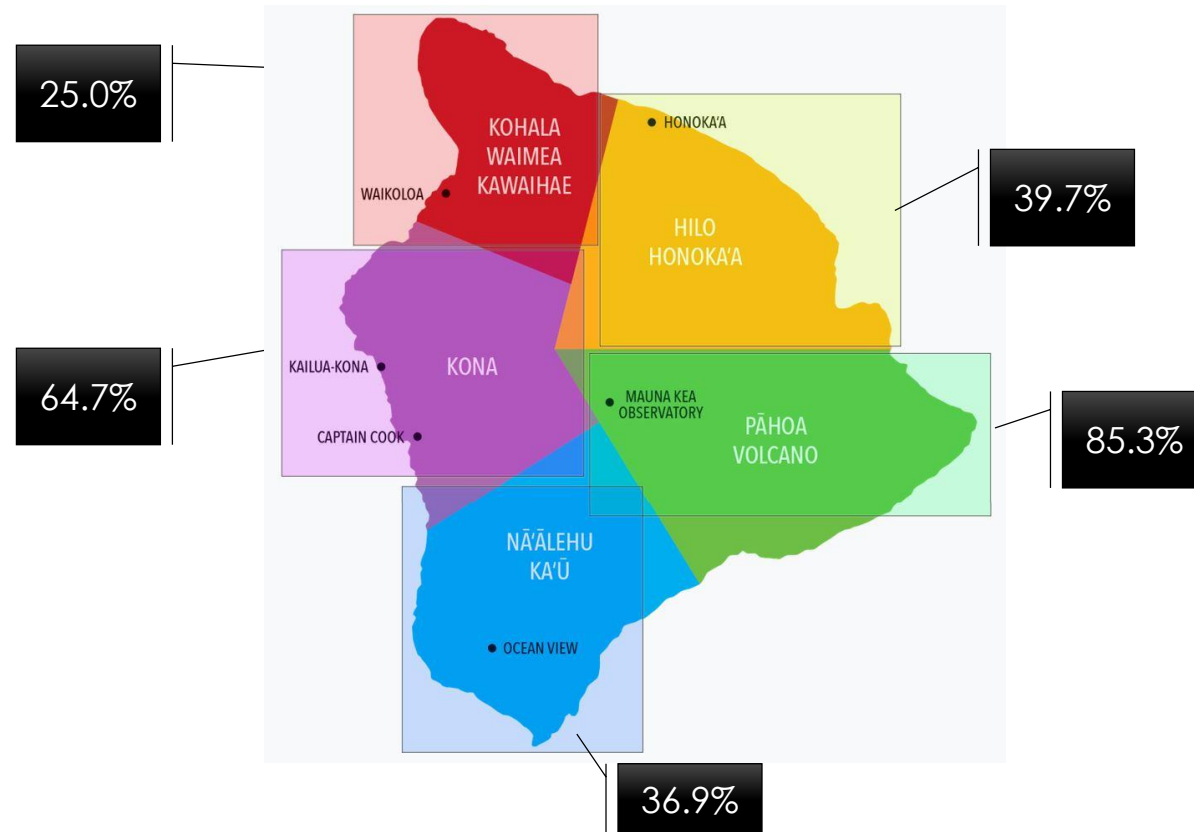
# AREAS VISITED ISLAND OF HAWAI'I CANADA



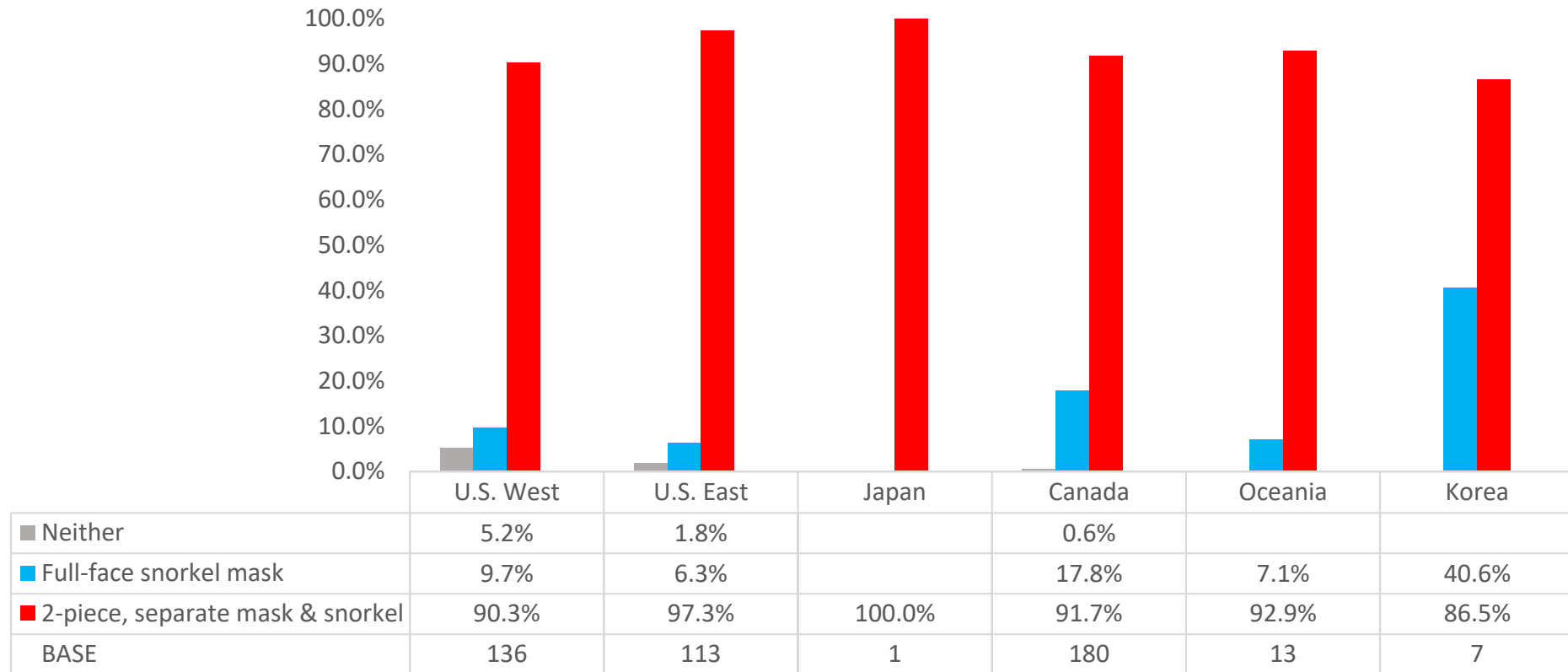
# AREAS VISITED ISLAND OF HAWAI'I OCEANIA



# AREAS VISITED ISLAND OF HAWAI'I KOREA



# SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I

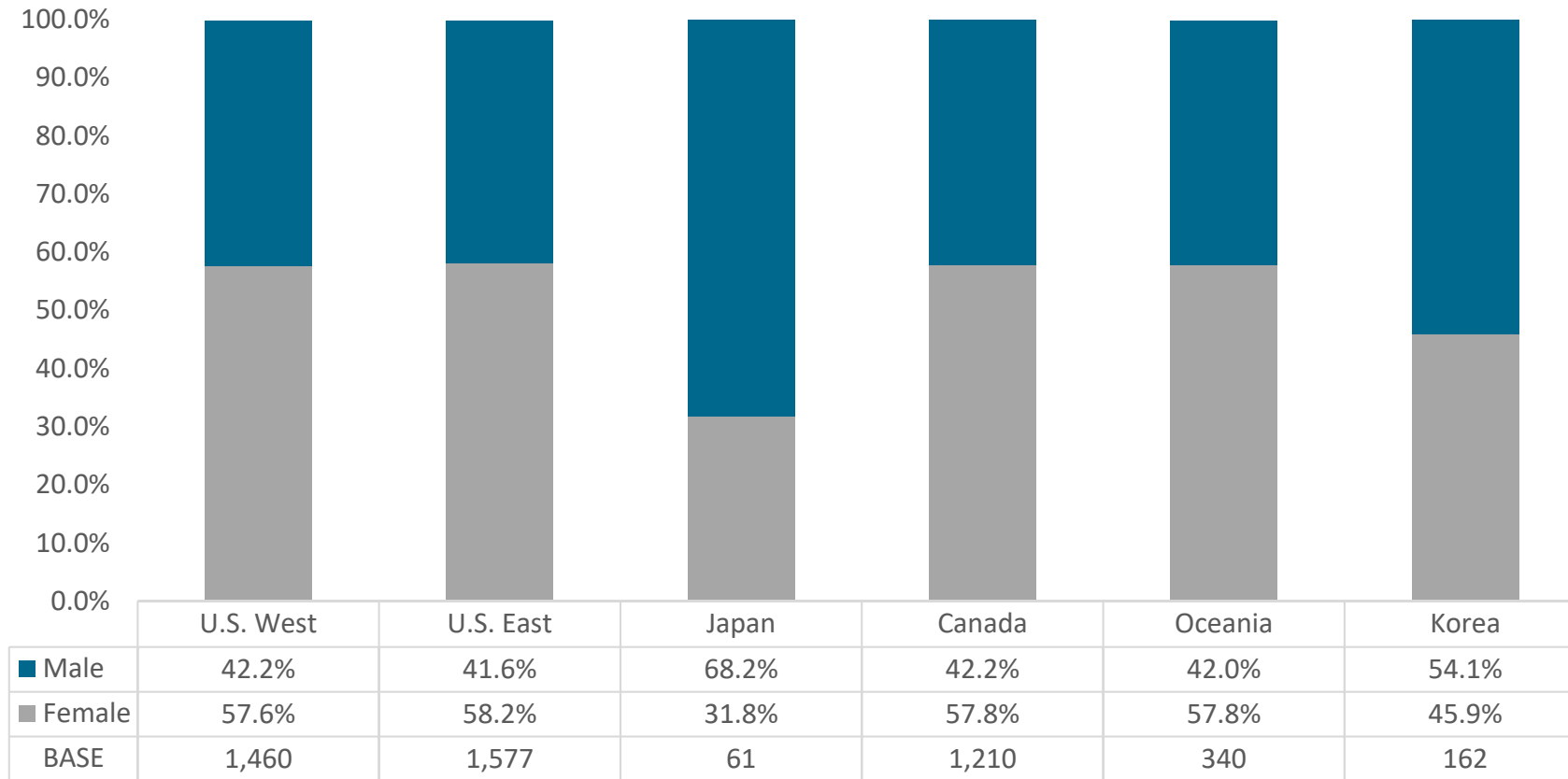


# SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

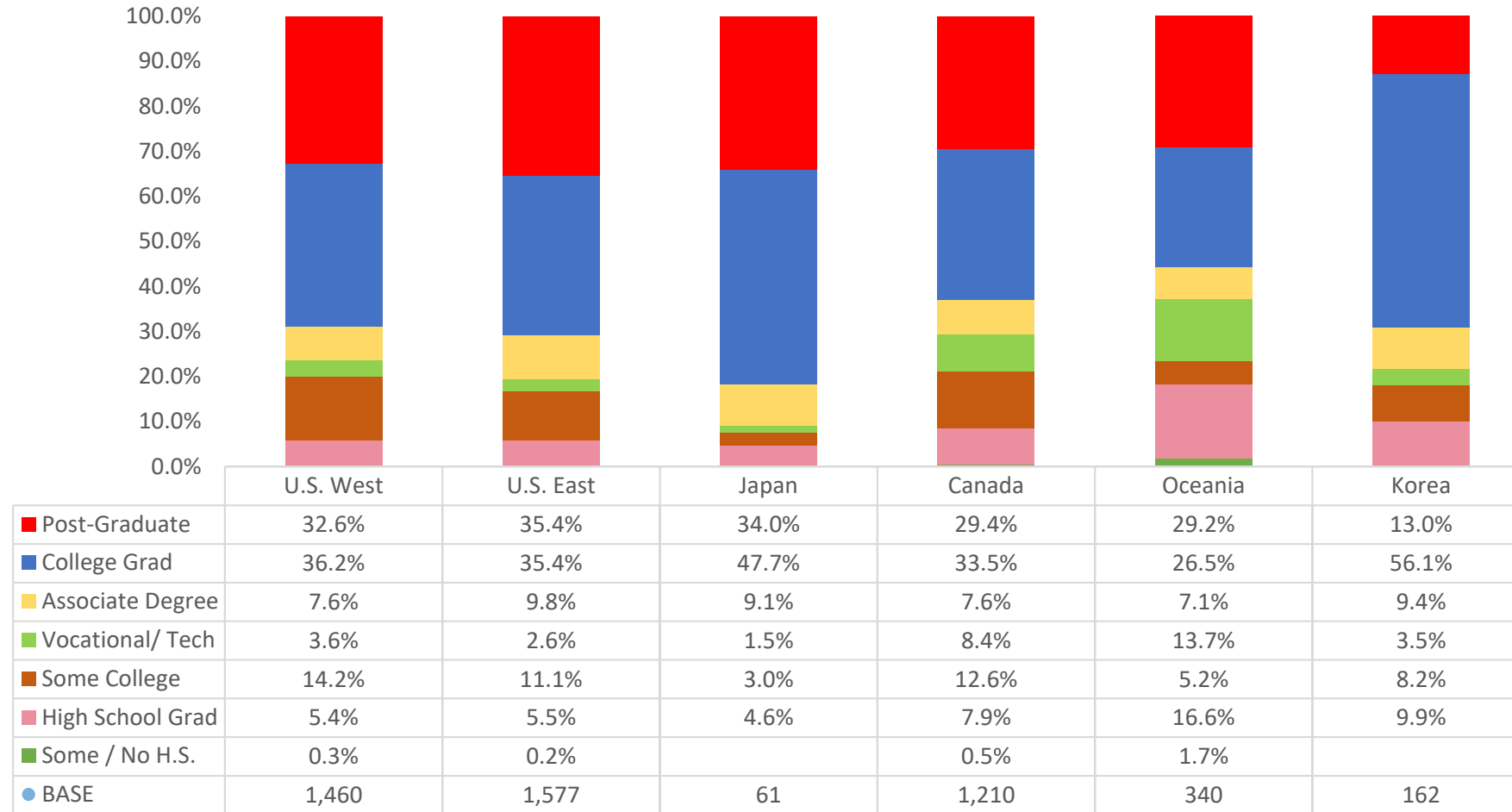
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	98.5%	99.1%	100.0%	99.5%	100.0%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	0.8%	0.9%	-	0.5%	-	-
Yes, while doing another type of ocean activity	0.8%	-	-	-	-	-
BASE	129	111	1	179	13	7

# 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	4.9%	4.2%	4.4%	7.6%
\$40,000 to \$59,999	6.4%	6.9%	7.8%	7.4%
\$60,000 to \$79,999	8.0%	8.8%	9.2%	10.7%
\$80,000 to \$99,999	7.4%	10.8%	11.2%	9.7%
\$100,000 to \$124,999	13.9%	14.3%	12.5%	11.6%
\$125,000 to \$149,999	11.0%	13.0%	13.4%	12.4%
\$150,000 to \$174,999	10.2%	10.4%	9.3%	9.6%
\$175,000 to \$199,999	7.0%	6.1%	8.3%	8.7%
\$200,000 to \$249,999	10.0%	7.5%	7.9%	7.9%
\$250,000 +	21.2%	18.0%	15.9%	14.3%

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	7.7%
¥3.5 ¥4.5 million	1.5%
¥4.5 ¥5.5 million	6.9%
¥5.5 ¥6.5 million	14.6%
¥6.5 ¥7.5 million	3.1%
¥7.5 ¥8.5 million	14.6%
¥8.5 ¥10.0 million	16.1%
¥10.0 ¥15.0 million	9.3%
¥15.0 ¥20.0 million	10.0%
¥20.0 million +	16.2%

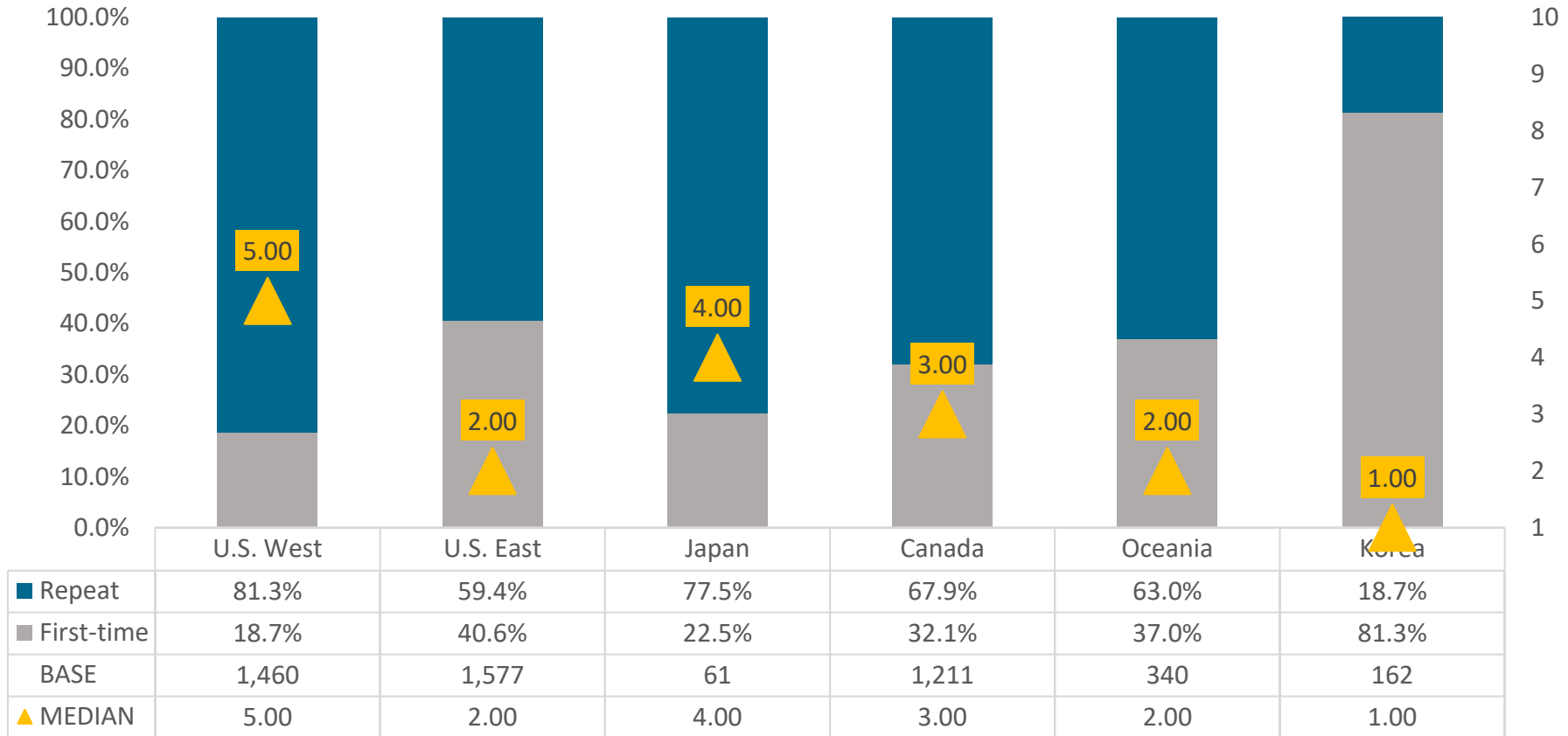
# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	4.3%
₩16,305,000 27,173,999	2.7%
₩27,174,000 38,041,999	18.3%
₩38,042,000 48,911,999	14.0%
₩48,912,000 59,781,999	11.3%
₩59,782,000 70,652,999	7.1%
₩70,653,000 81,520,999	8.0%
₩81,521,000 92,390,999	7.0%
₩92,391,000 103,259,999	6.4%
₩103,260,000 149,999,999	10.2%
₩150,000,000 199,999,999	7.7%
₩200,000,000+	3.2%

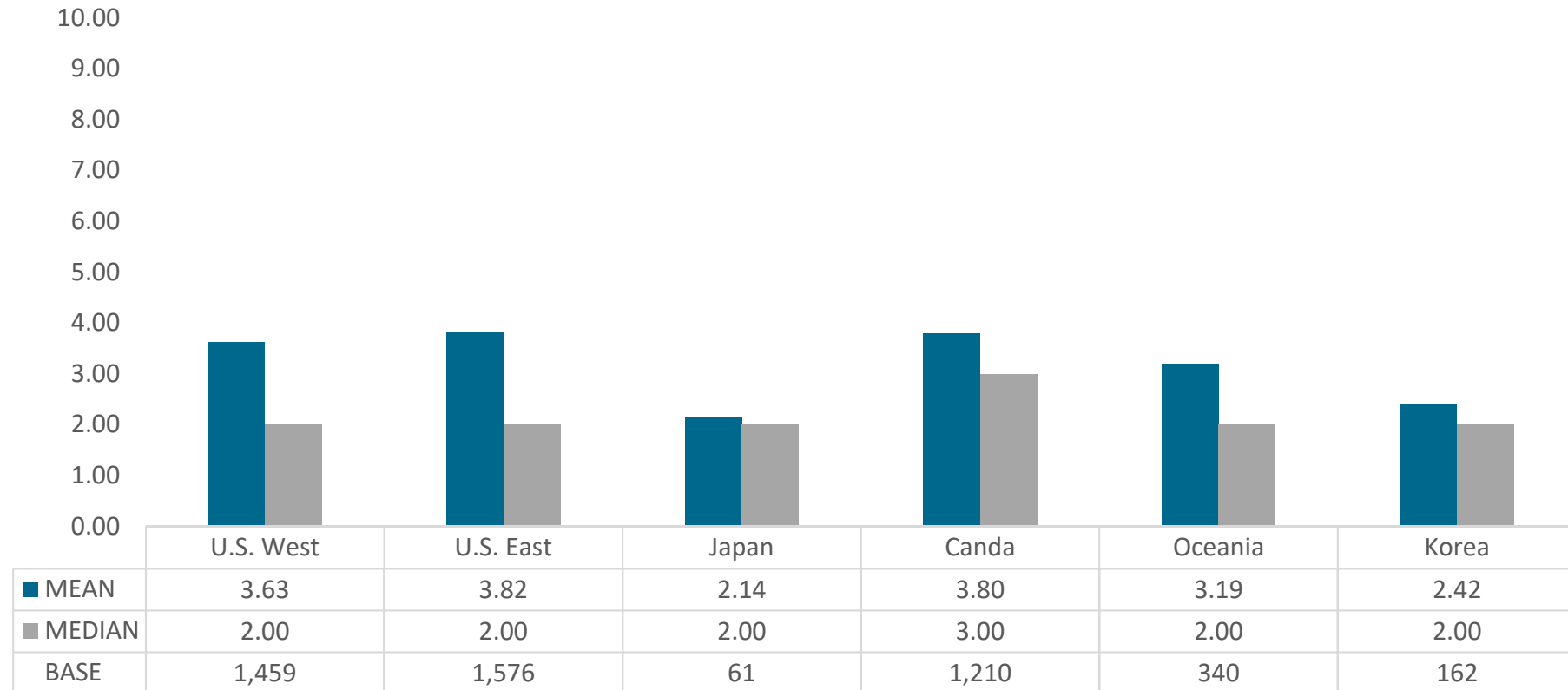
# VISITOR PROFILE - AGE



# 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
<b>Spouse</b>	63.3%	58.6%	43.2%	64.8%	58.9%	78.5%
<b>Other adult family</b>	27.5%	28.6%	13.6%	32.2%	22.9%	9.4%
<b>Child &lt;18</b>	26.6%	19.0%	3.0%	23.7%	19.6%	5.6%
<b>Friend/ Associate</b>	14.8%	17.0%	12.9%	17.8%	11.5%	7.1%
<b>Alone</b>	8.5%	10.7%	37.1%	5.7%	13.6%	4.7%
<b>Girlfriend/ boyfriend</b>	7.1%	6.1%	-	6.8%	4.2%	4.3%
<b>Same sex partner</b>	1.0%	1.3%	-	0.3%	1.2%	-

# 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	663	3.81
U.S. East	983	3.13
Japan	59	12.76
Canada	513	4.33
Oceania	319	5.49
Korea	154	7.90
China	21	21.39
All MMAs	2,712	1.88

153 \* 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	233	6.42
U.S. East	248	6.22
Japan	3	56.58
Canada	235	6.39
Oceania	18	23.10
Korea	4	49.00
China	5	43.83
All MMAs	746	3.59

154 \* 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	442	4.66
U.S. East	512	4.33
Japan	2	69.30
Canada	464	4.55
Oceania	40	15.50
Korea	9	32.67
China	11	29.55
All MMAs	1,480	2.55

155 \* 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	269	5.98
U.S. East	328	5.41
Japan	8	34.65
Canada	353	5.22
Oceania	32	17.32
Korea	15	25.30
China	15	25.30
All MMAs	1,020	3.07

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