

VISITOR SATISFACTION STUDY Q1 2023

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 1, 2023 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	1,500	2.53	16.22
U.S. East	1,593	2.46	17.18
Japan	87	10.51	7.98
Canada	912	3.25	21.29
Oceania	285	5.80	14.42
Korea	334	5.36	43.77
China	31	17.60	6.60
All visitor markets	4,742	1.42	17.39

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-Flight and International Departure Intercept surveys. Selected U.S. visitors were sent an email invitation with a link to complete the survey online. Intercept surveys were also conducted by trained interviewers with departing visitors from Korea at the Daniel K. Inouye Airport in Honolulu.

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 1, 2023. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

Effect of COVID-19 Pandemic

COVID-19 Travel Restrictions

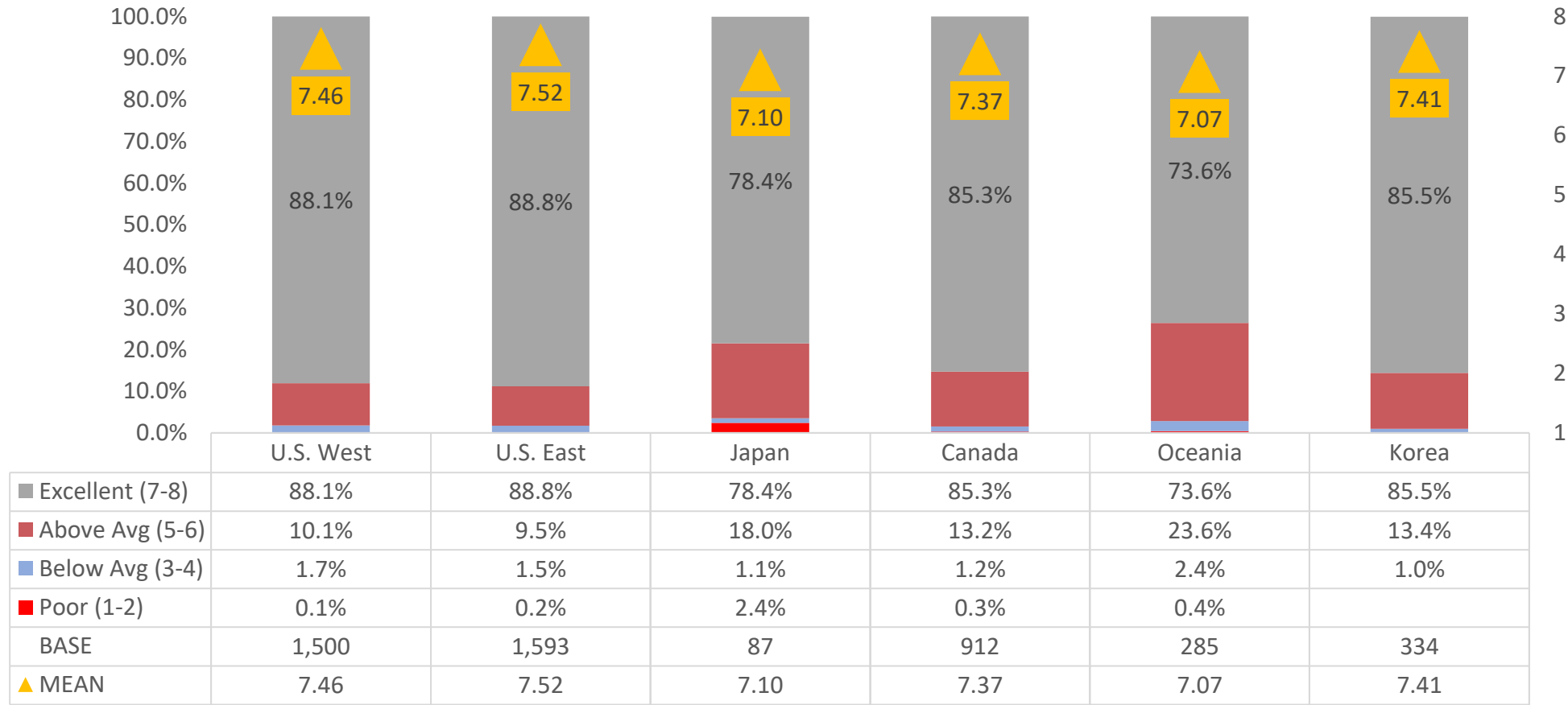
At the time of the Quarter 1, 2023 VSAT Survey, most international visitor markets had relaxed travel restrictions and quarantine requirements. However, there continued to be limited direct flights to Hawai'i from Japan, Korea and Oceania. There have been no direct flights from China since service ended 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



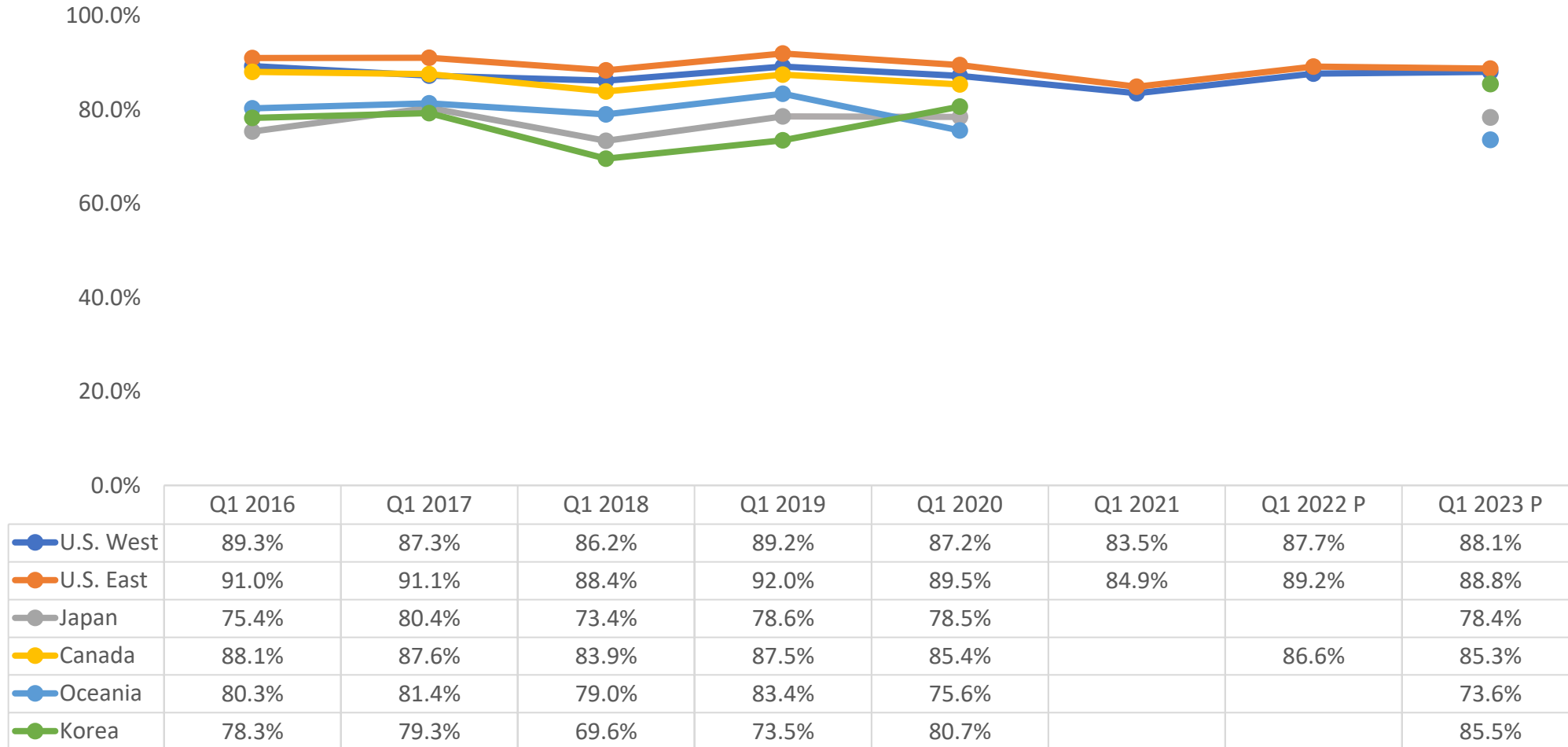
Satisfaction - State of Hawai'i by Visitor Market

- **Gender:** Female respondents from U.S. East gave higher satisfaction scores than male respondents from this market.
- **Age:** Younger travelers (18-34) from U.S. West gave statistically higher satisfaction scores compared to senior visitors (65+) from this visitor market. Younger travelers from U.S. East under the age of 35 also gave statistically higher satisfaction scores when compared to travelers between the ages of 50 and 64 from this visitor market.

Satisfaction - State of Hawai'i by Visitor Market

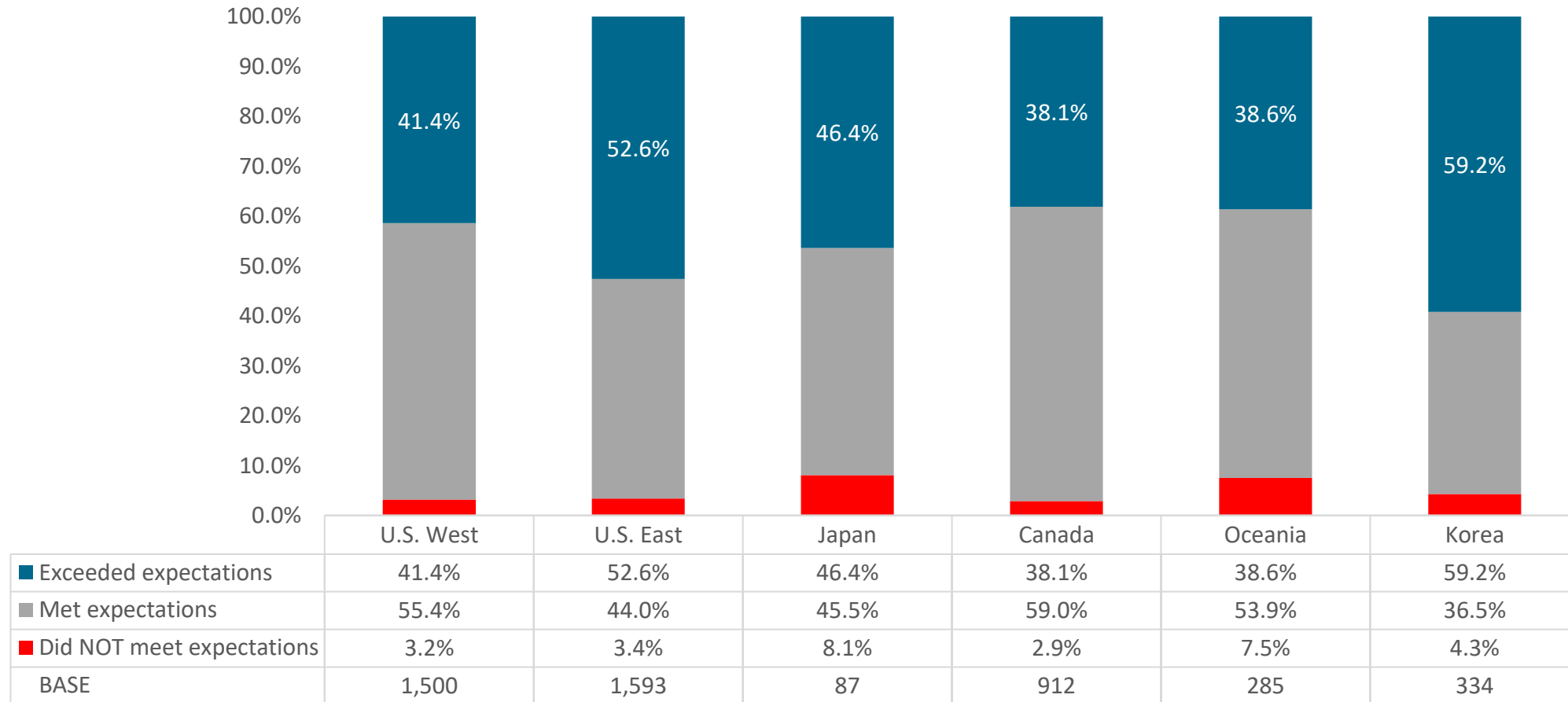
Tracking Data – Rating of “Excellent” (7-8)

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



P= Preliminary Data

SATISFACTION - HAWAI'I TRIP EXPECTATIONS



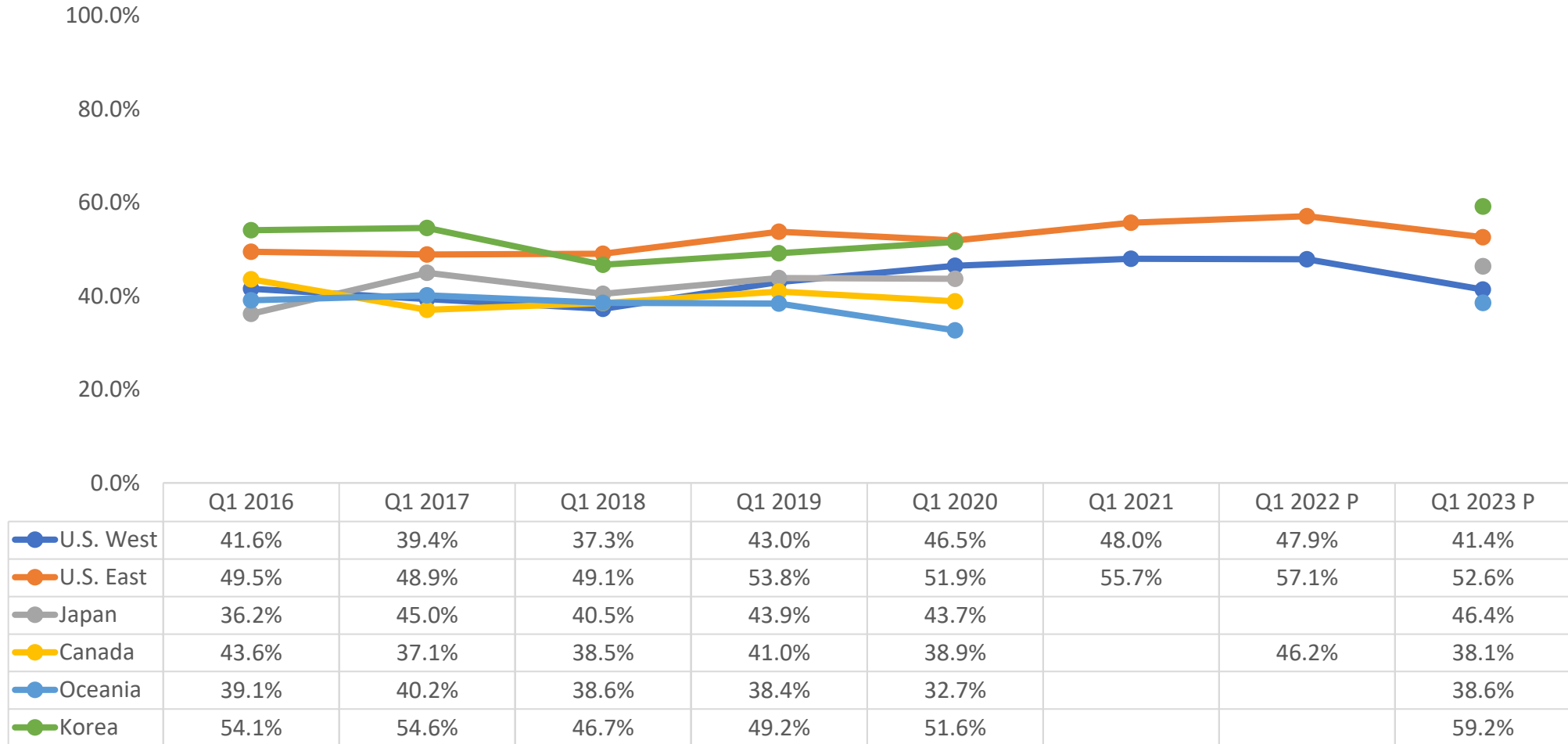
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***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, and Canada.
- ***Age:*** Younger respondents (between 18 – 34 years old) from U.S. West, U.S. East, and Canada were more likely to respond that their trip exceeded expectations compared to visitors from these markets in other age groups. Agreement with this sentiment tended to decline with age.
- ***Gender:*** Female visitors from U.S. West and U.S. East gave higher mean satisfaction scores compared to male visitors.
- ***Household income (U.S.\$):*** Visitors from U.S. West and U.S. East that reside in homes in the bottom income tier (<\$100K) were statistically more satisfied with their trip in this area than were those travelers that reside in more affluent homes.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

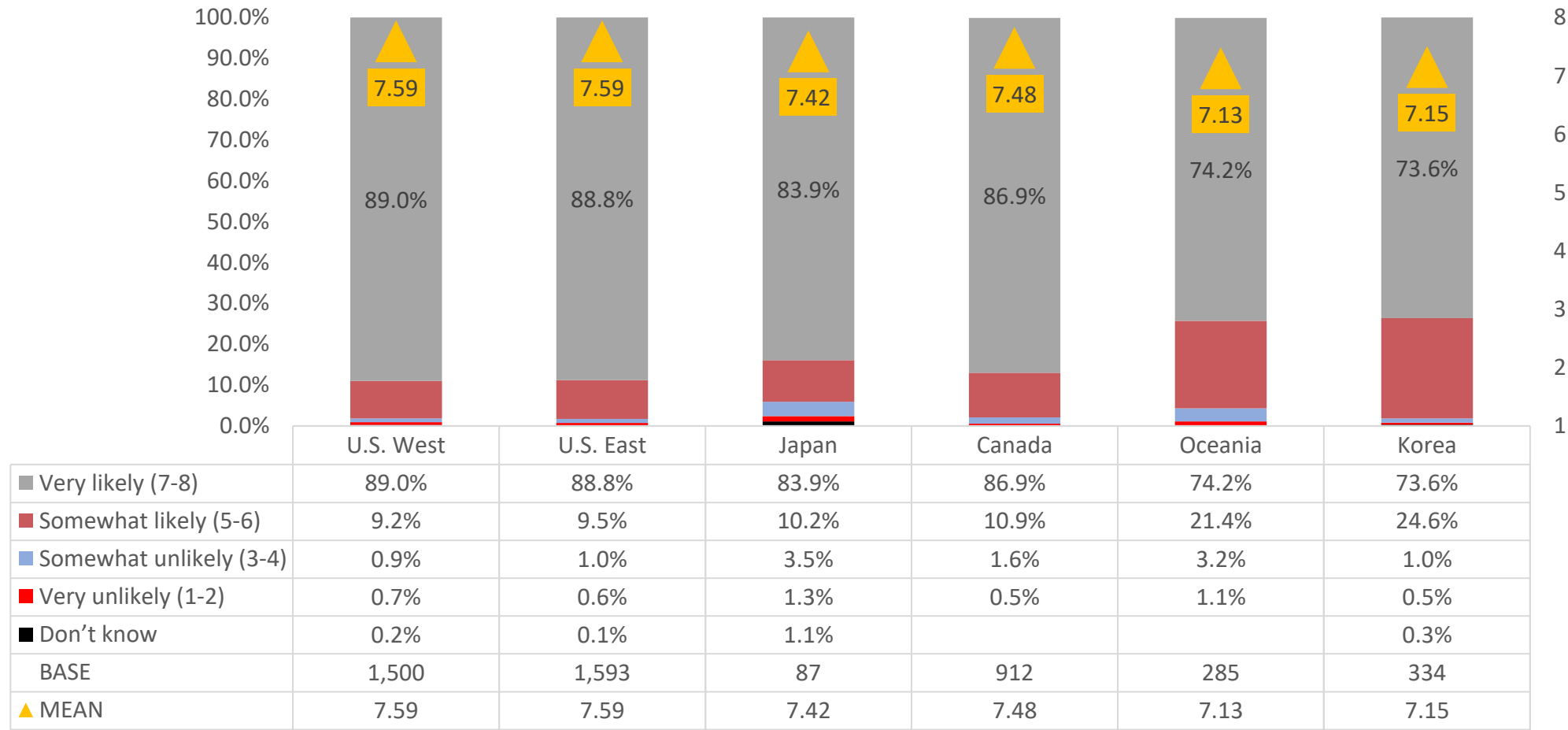
Tracking Data – Rating of “Exceeded expectations”

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

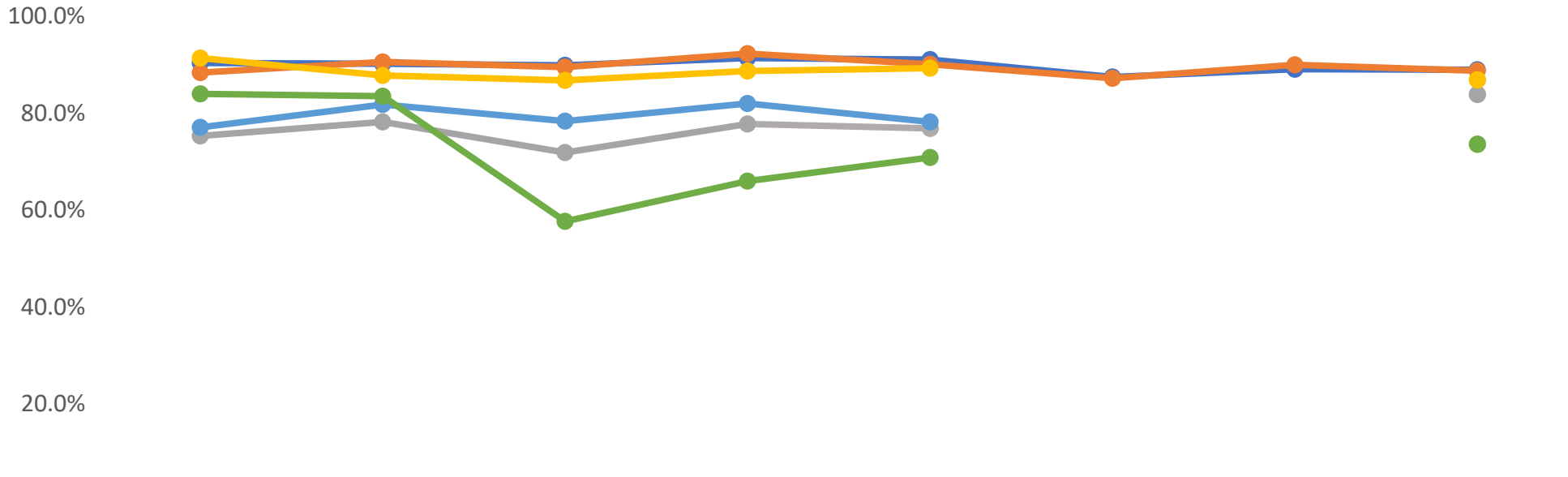


BRAND/ DESTINATION - ADVOCACY

- ***Trips to Hawai'i:*** Repeat visitors from U.S. West, U.S. East, and Japan 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.
- ***Age:*** Senior (65+) travelers from Japan were statistically less likely to potentially recommend the state to others compared to younger segments from this travel market.

BRAND/ DESTINATION - ADVOCACY

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

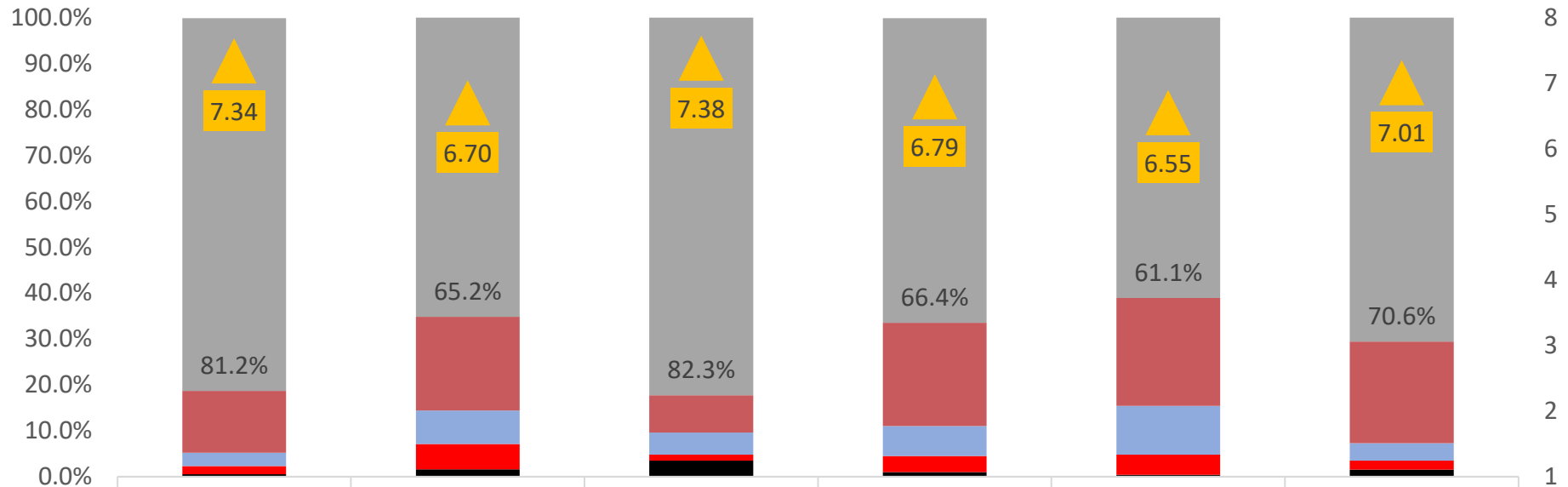


	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	90.4%	90.2%	89.9%	91.4%	91.1%	87.5%	89.1%	89.0%
U.S. East	88.4%	90.6%	89.5%	92.3%	90.1%	87.2%	90.0%	88.8%
Japan	75.3%	78.2%	71.9%	77.8%	76.9%			83.9%
Canada	91.4%	87.8%	86.8%	88.7%	89.3%		91.8%	86.9%
Oceania	77.1%	81.8%	78.4%	82.0%	78.2%			74.2%
Korea	84.0%	83.5%	57.7%	66.0%	70.9%			73.6%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



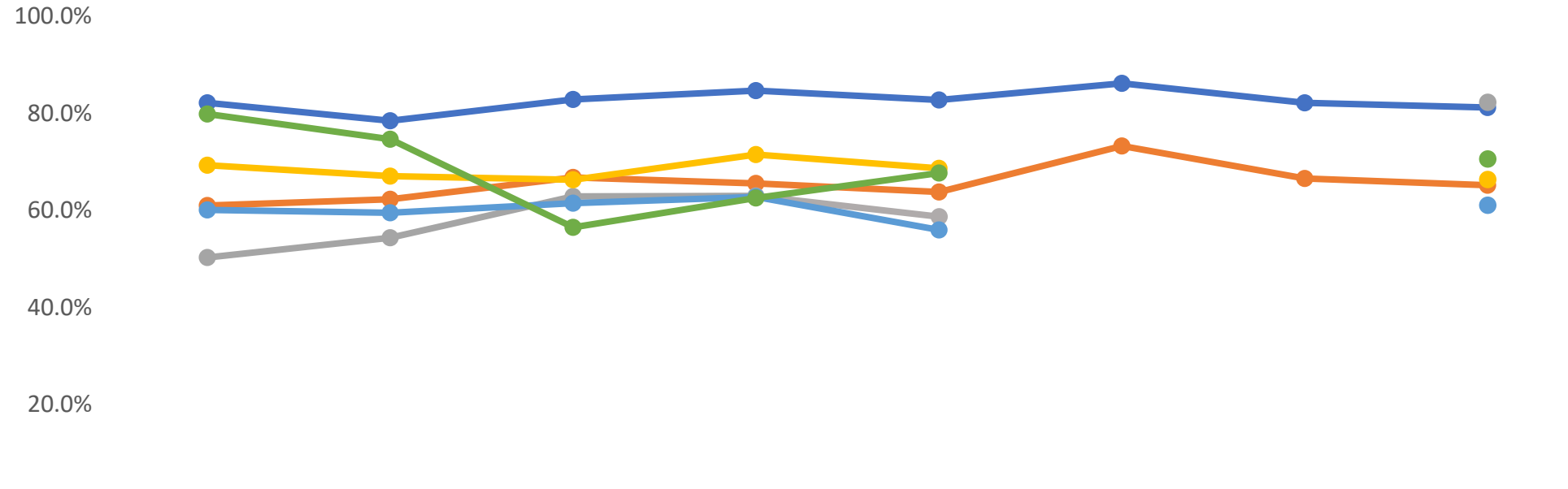
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Very likely (7-8)	81.2%	65.2%	82.3%	66.4%	61.1%	70.6%
Somewhat likely (5-6)	13.5%	20.4%	8.1%	22.5%	23.5%	22.1%
Somewhat unlikely (3-4)	2.9%	7.3%	4.8%	6.5%	10.6%	3.8%
Very unlikely (1-2)	1.8%	5.5%	1.3%	3.5%	4.4%	2.0%
Don't know	0.5%	1.6%	3.5%	1.0%	0.4%	1.5%
BASE	1,500	1,593	87	912	285	334
MEAN	7.34	6.70	7.38	6.79	6.55	7.01

LIKELIHOOD OF RETURN VISIT

- ***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, Japan, and Canada.
- ***Gender:*** Females from U.S. West 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. East were more likely to return to the state compared to those who traveled in larger travel parties.
- ***Household income (U.S.\$):*** 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. West, 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.

LIKELIHOOD OF RETURN VISIT

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	82.2%	78.5%	82.9%	84.7%	82.8%	86.2%	82.2%	81.2%
U.S. East	61.0%	62.3%	66.8%	65.6%	63.8%	73.3%	66.6%	65.2%
Japan	50.3%	54.4%	62.9%	63.0%	58.7%			82.3%
Canada	69.3%	67.1%	66.3%	71.5%	68.7%		74.7%	66.4%
Oceania	60.1%	59.5%	61.5%	62.8%	56.0%			61.1%
Korea	79.9%	74.7%	56.5%	62.6%	67.7%			70.6%

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q1 2022 P	Q1 2023 P
53.1% Too expensive	45.6% Too expensive
27.7% Want to go someplace new	34.2% Poor value
21.2% Poor value	25.3% Want to go someplace new
21.0% COVID-19	22.7% Too crowded/ congested
17.7% Too crowded/ congested	17.7% Too commercialized/ overdeveloped
15.0% Too commercialized/ overdeveloped	13.9% Five years is too soon to revisit
12.4% Five years is too soon to revisit	13.9% No compelling reason to return
11.8% Flight is too long	11.4% Other financial obligations
11.8% No compelling reason to return	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q1 2022 P	Q1 2023 P
48.8% Too expensive	51.7% Too expensive
42.7% Want to go someplace new	43.1% Flight too long
42.7% Flight too long	37.4% Want to go someplace new
21.6% Poor value	21.3% Poor value
16.1% Five years is too soon to revisit	14.8% Five years is too soon to revisit
14.1% Too crowded/ congested	14.8% Too crowded/ congested
11.6% Too commercialized/ overdeveloped	12.6% Too commercialized/ overdeveloped
11.1% Other financial obligations	11.3% No compelling reason to return
	10.0% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q1 2020*	Q1 2023 P**
34.9% Too expensive	Insufficient number of respondents
30.1% Five years is too soon to revisit	
28.6% Want to go someplace new	
27.5% Other financial obligations	
14.8% Flight too long	

*Please note Japanese visitors were not sampled in 2021 & 2022 due to low visitor counts as a result of the pandemic.

**Caution small base

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q1 2022 P	Q1 2023 P
42.0% Too expensive	63.2% Too expensive
34.6% Want to go someplace new	35.3% Want to go someplace new
26.2% Flight too long	34.7% Poor value
15.9% Too crowded/ congested	33.5% Flight too long
15.0% Too commercialized/ overdeveloped	13.8% Too commercialized/ overdeveloped
12.2% Poor value	12.6% Too crowded/ congested
12.1% Five years is too soon to revisit	10.3% Five years is too soon to revisit
10.3% Other financial obligations	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q1 2020*	Q1 2023 P
57.1% Too expensive	62.0% Too expensive
43.9% Want to go someplace new	51.6% Poor value
37.9% Poor value	33.8% Want to go someplace new
25.3% Too commercialized/ overdeveloped	28.5% Too crowded/ congested
18.2% Too crowded/ congested	23.7% Too commercialized/ overdeveloped
17.8% Flight is too long	19.0% Five years is too soon to revisit
13.2% No compelling reason to return	13.7% No compelling reason to return
11.4% Five years is too soon to revisit	

*Please note Oceania visitors were not sampled in 2021 & 2022 due to low visitor counts as a result of the pandemic.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q1 2020*	Q1 2023 P**
62.5% Too expensive	65.5% Too expensive
34.4% Flight is too long	41.5% Poor value
31.1% Poor value	24.2% Too crowded/ congested
21.9% Five years is too soon to revisit	17.3% Too commercialized/ overdeveloped
15.7% Too crowded/ congested	17.2% Five years is too soon to revisit
12.5% Other financial obligations	13.8% No compelling reason to return
12.5% No compelling reason to return	13.8% Flight is too long
	13.7% Want to go someplace new
	10.4% Unfriendly people/ felt unwelcome
	10.4% Poor service

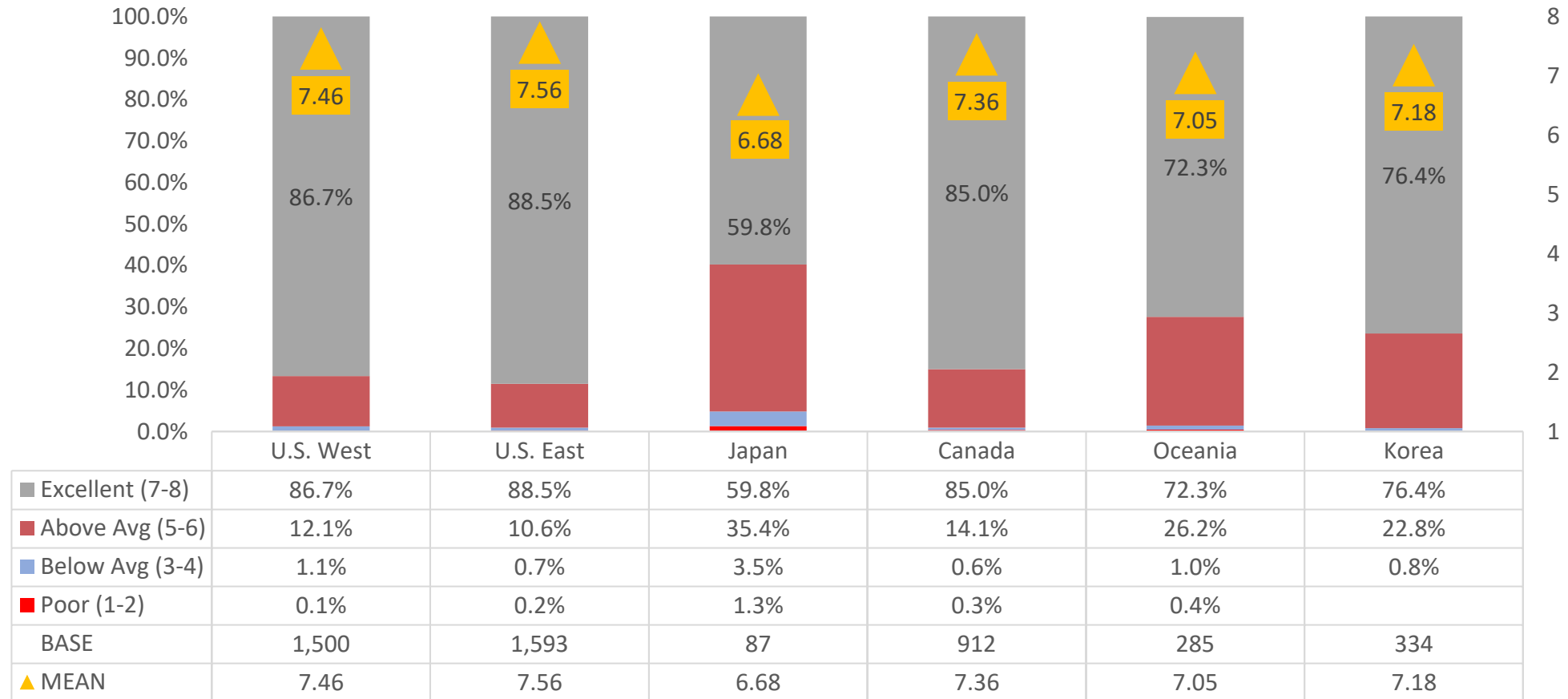
*Please note Korean visitors were not sampled in 2021 & 2022 due to low visitor counts as a result of the pandemic

**Caution small base.

P= Preliminary Data

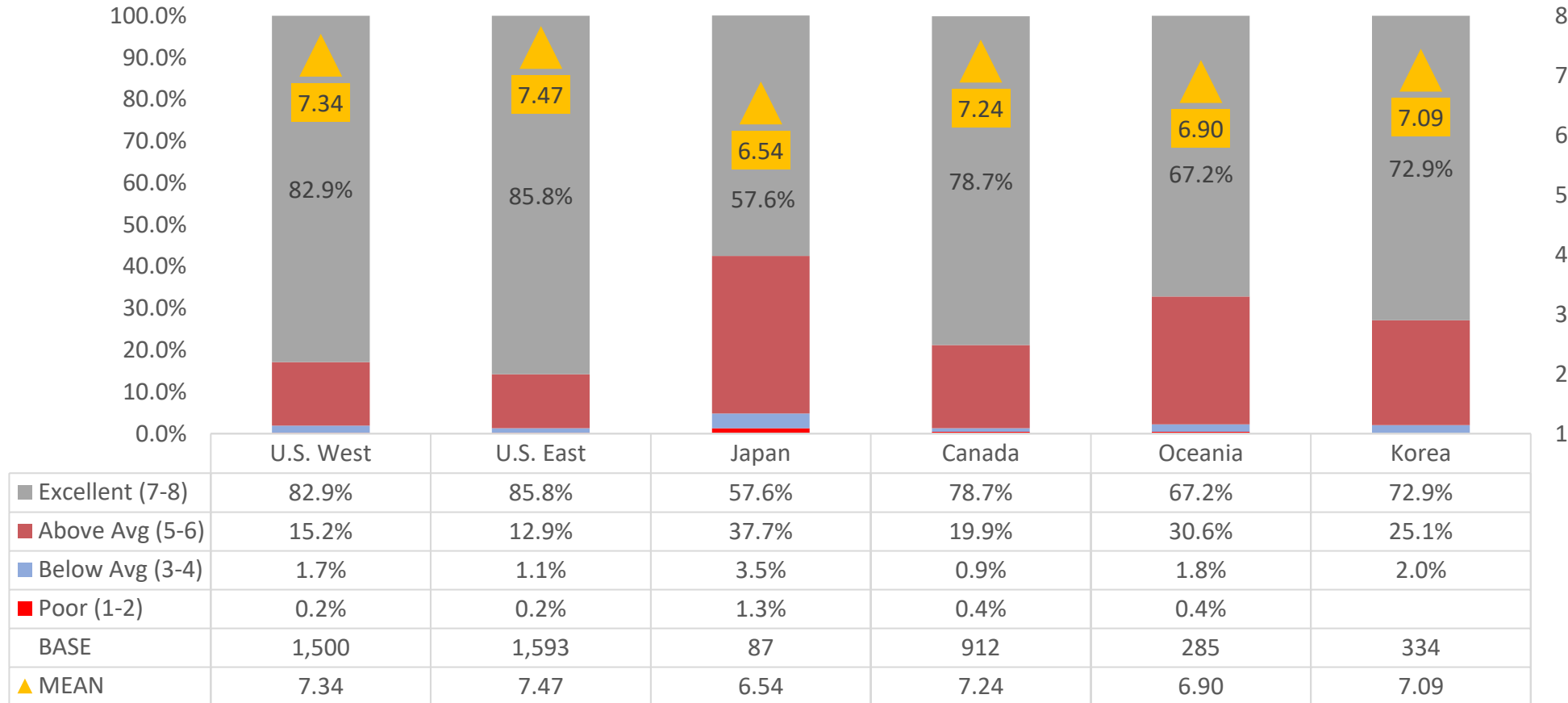
OFFERING A VARIETY OF EXPERIENCES

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



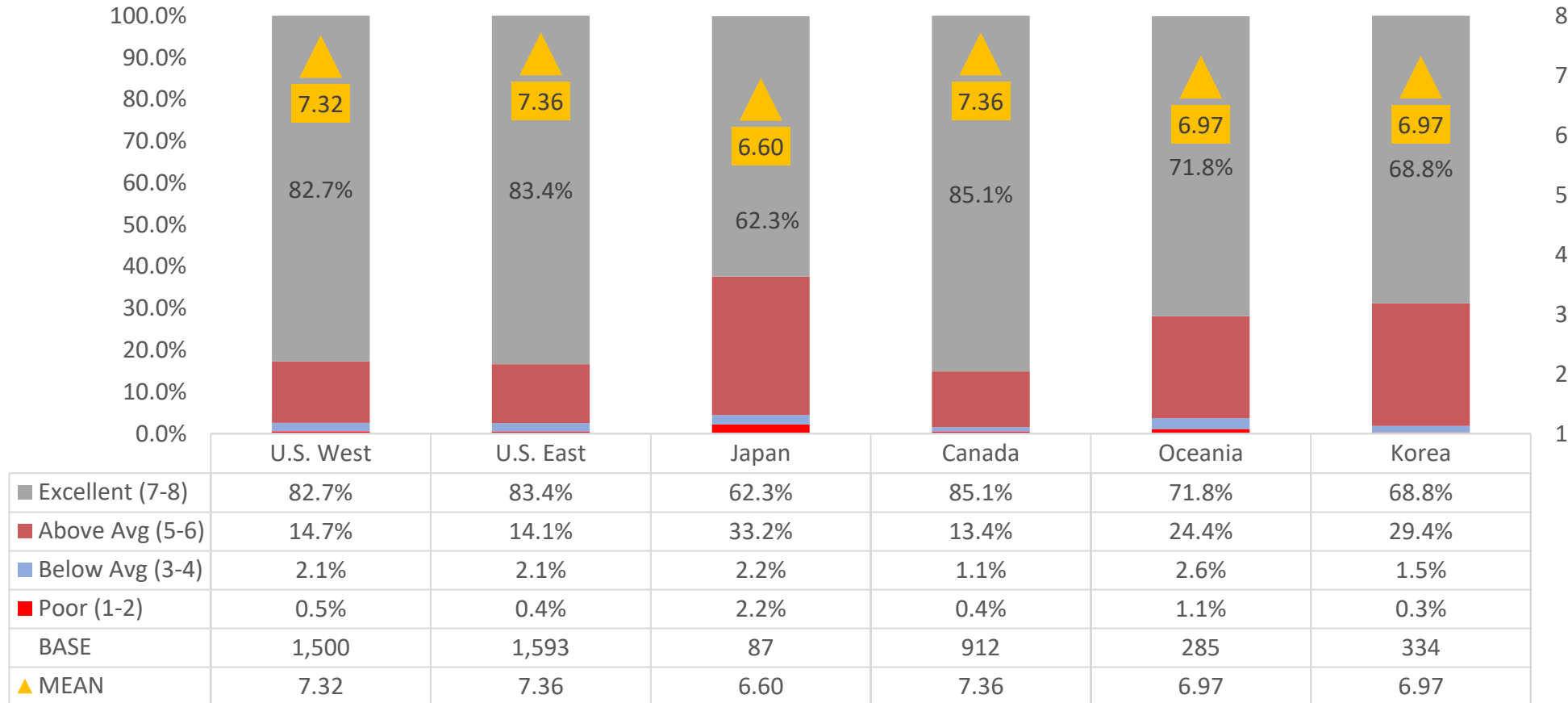
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



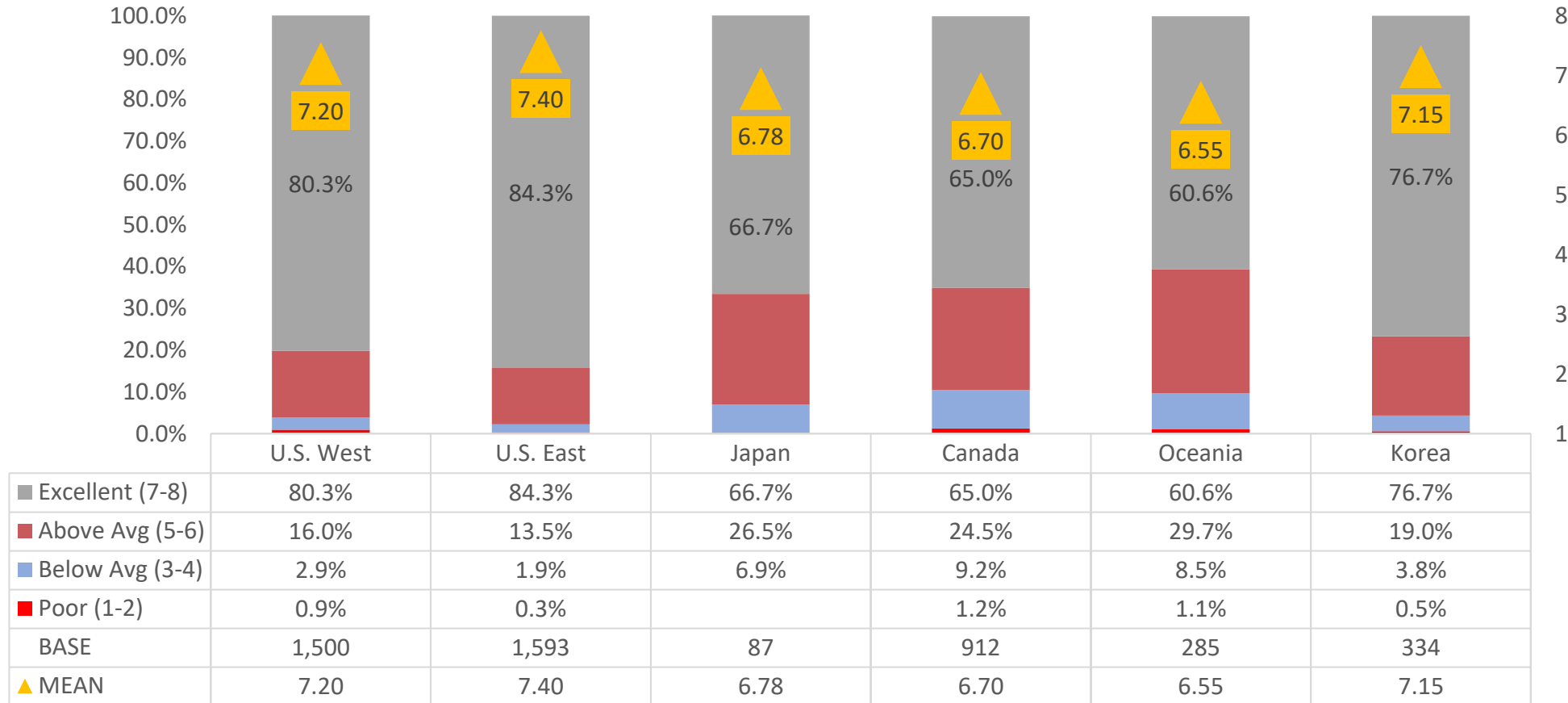
SAFE AND SECURE DESTINATION

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



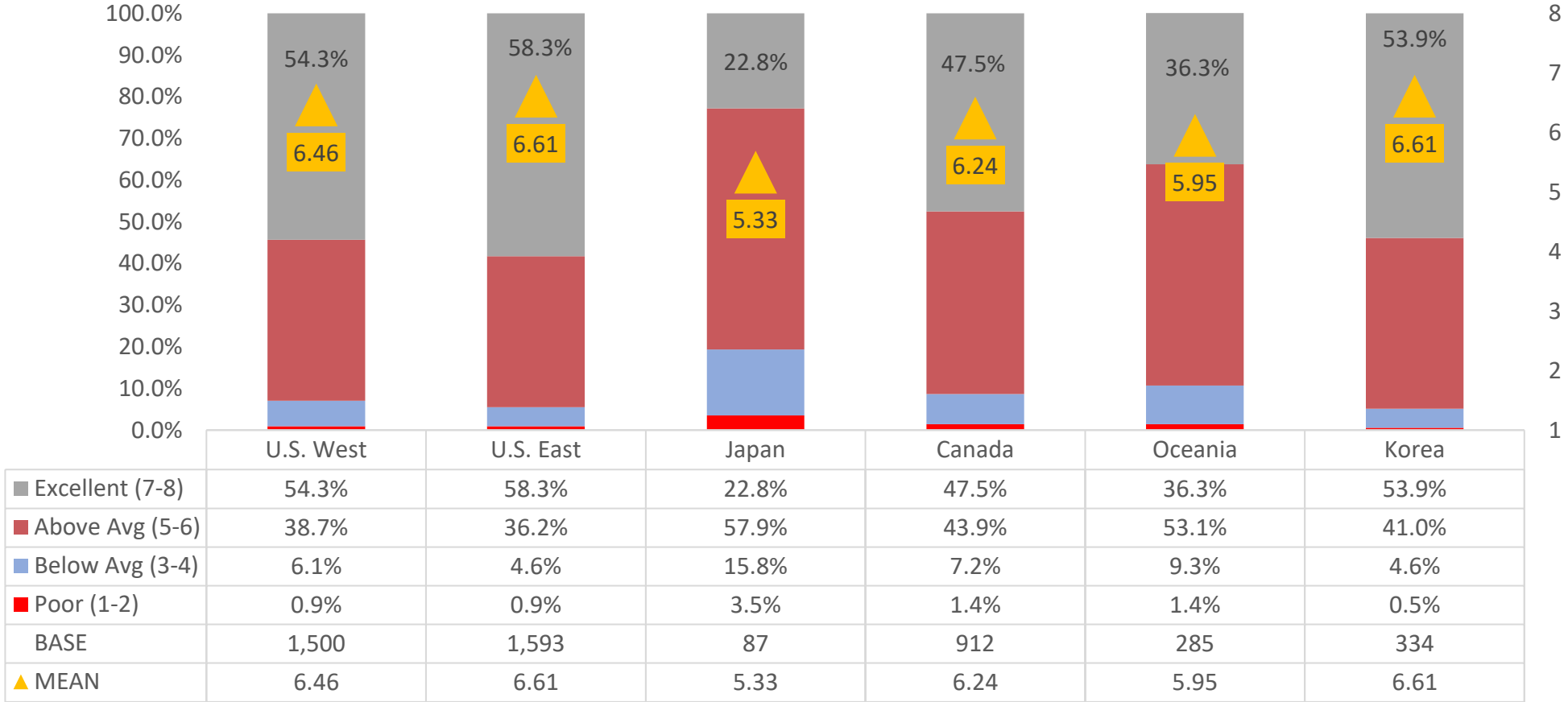
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	97.8%	98.8%	95.2%	98.3%	89.0%	99.7%
On own (self-guided)	83.9%	81.0%	70.8%	83.4%	56.7%	80.8%
Helicopter/ airplane	2.5%	6.4%	0.0%	3.6%	2.1%	5.3%
Boat/ submarine/ whale	31.9%	41.7%	6.9%	29.9%	16.3%	29.6%
Visit towns/communities	54.1%	56.8%	47.4%	61.1%	25.6%	34.4%
Limo/ van/ bus tour	7.2%	13.4%	12.9%	8.9%	24.5%	10.9%
Scenic views/ natural landmark	60.5%	70.2%	21.1%	67.6%	46.7%	58.2%
Movie/ TV/ film location	3.3%	5.5%	4.8%	4.6%	5.4%	20.2%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.0%	97.2%	96.5%	98.5%	94.0%	98.2%
Beach/ sunbathing	85.2%	84.5%	68.4%	90.2%	77.6%	81.8%
Bodyboarding	10.5%	5.8%	1.1%	16.1%	5.2%	2.8%
Standup paddle board	5.7%	3.3%	1.1%	6.2%	9.4%	5.8%
Surfing	5.3%	5.6%	6.8%	9.1%	10.4%	12.9%
Canoeing/ kayak	6.3%	4.7%	2.3%	6.2%	2.8%	4.5%
Swim in the ocean	62.4%	61.6%	25.6%	71.8%	64.6%	48.8%
Snorkeling	41.7%	34.9%	6.8%	47.5%	25.7%	50.1%
Freediving	1.5%	1.1%	0.0%	0.7%	1.3%	1.5%
Windsurf/ Kitesurf	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%
Jet ski/ Parasail	0.6%	1.0%	1.3%	0.8%	1.4%	3.5%
Scuba diving	2.5%	2.1%	1.1%	2.2%	1.4%	1.3%
Fishing	2.5%	2.4%	0.0%	2.2%	2.1%	0.0%
Golf	6.2%	6.6%	6.9%	10.3%	4.8%	4.6%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.0%	97.2%	96.5%	98.5%	94.0%	98.2%
Run/ Jog/ Fitness walk	31.3%	27.1%	31.0%	36.9%	28.9%	13.9%
Cycling	2.7%	2.9%	5.8%	5.2%	0.7%	3.3%
Spa	7.6%	9.9%	3.5%	5.9%	7.4%	5.8%
Hiking	41.3%	49.4%	28.1%	51.2%	24.3%	25.6%
Backpack/ camp	1.4%	2.0%	0.0%	2.0%	0.3%	2.3%
Agritourism	12.7%	14.8%	8.2%	11.1%	5.8%	17.5%
Sport event/ tournament	2.8%	1.8%	0.0%	0.9%	2.1%	1.3%
Park/ botanical garden	36.1%	40.2%	20.0%	41.5%	25.4%	20.8%
Waterpark	1.2%	1.1%	1.1%	2.3%	1.6%	4.1%
Mountain tube/ waterfall rappel	2.0%	1.7%	0.0%	2.0%	1.0%	0.5%
Zip-lining	3.6%	3.2%	0.0%	2.1%	1.9%	1.5%
Skydiving	0.3%	0.2%	0.0%	0.1%	0.0%	2.5%
All terrain vehicle (ATV)	2.5%	3.1%	1.3%	1.6%	1.8%	9.3%
Horseback riding	1.1%	1.5%	1.1%	0.6%	1.4%	0.5%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	99.6%	98.2%	98.9%	98.9%	97.7%	99.0%
Lunch/ sunset/ dinner/ evening cruise	21.8%	25.0%	9.4%	21.1%	19.3%	36.2%
Live music/ stage show	28.7%	33.6%	19.8%	27.7%	20.1%	12.9%
Nightclub/ dancing/ bar/ karaoke	7.5%	7.8%	3.4%	7.7%	5.9%	2.5%
Fine dining	48.6%	49.4%	31.6%	42.4%	31.0%	50.6%
Family restaurant	62.6%	58.2%	24.4%	65.1%	73.6%	36.5%
Fast food	33.3%	31.2%	51.4%	42.7%	54.8%	50.8%
Food truck	43.9%	41.4%	27.5%	44.2%	36.1%	60.4%
Café/ coffee house	50.2%	47.3%	58.1%	56.8%	62.0%	61.2%
Ethnic dining	27.5%	32.0%	13.9%	23.0%	11.9%	22.3%
Farm-to-table cuisine	17.9%	20.0%	14.9%	15.3%	2.8%	2.8%
Prepared own meal	49.8%	42.2%	34.2%	61.6%	22.8%	10.9%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	96.9%	96.2%	98.9%	98.5%	96.0%	97.5%
Mall/ department store	42.7%	41.2%	75.6%	56.6%	75.4%	77.2%
Designer boutique	16.9%	19.7%	24.7%	19.9%	25.4%	5.6%
Hotel/ resort store	32.5%	41.1%	27.8%	30.7%	29.8%	34.2%
Swap meet/ flea market	17.1%	14.8%	3.4%	15.0%	5.1%	3.3%
Discount/ outlet store	14.9%	15.7%	28.6%	20.1%	30.8%	57.7%
Supermarket	61.9%	56.1%	64.0%	68.7%	41.6%	44.3%
Farmer's market	38.5%	31.1%	22.1%	44.2%	16.7%	10.9%
Convenience store	49.6%	49.3%	47.7%	53.5%	64.9%	50.6%
Duty free store	2.7%	3.7%	13.2%	4.5%	8.0%	26.5%
Hawai'i-made products	45.2%	46.9%	16.4%	46.1%	34.0%	25.5%
Local shop/ artisan	58.7%	61.0%	23.4%	61.0%	44.9%	18.7%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	70.6%	79.2%	58.2%	70.6%	64.9%	61.3%
Historic military site	18.6%	28.3%	9.4%	17.5%	35.6%	22.6%
Historic Hawaiian site	31.1%	37.8%	17.7%	34.0%	20.4%	9.9%
Other historical site	12.5%	15.8%	10.5%	12.4%	9.0%	14.7%
Art museum	3.1%	3.7%	3.4%	2.9%	4.2%	3.8%
Art gallery/ exhibition	12.2%	11.8%	4.5%	12.7%	6.7%	1.3%
Luau/ Polynesian show/ hula show	25.0%	36.6%	10.3%	26.8%	23.2%	17.7%
Lesson- ex. ukulele, hula, canoe, lei making	3.5%	6.1%	2.3%	4.8%	4.0%	5.6%
Play/ concert/ theatre	3.4%	3.4%	3.5%	3.6%	2.6%	1.5%
Art/ craft fair	11.7%	12.2%	4.7%	11.7%	2.4%	4.1%
Festival /event	5.4%	5.4%	6.8%	5.5%	5.0%	5.1%

ACTIVITIES - TRANSPORTATION

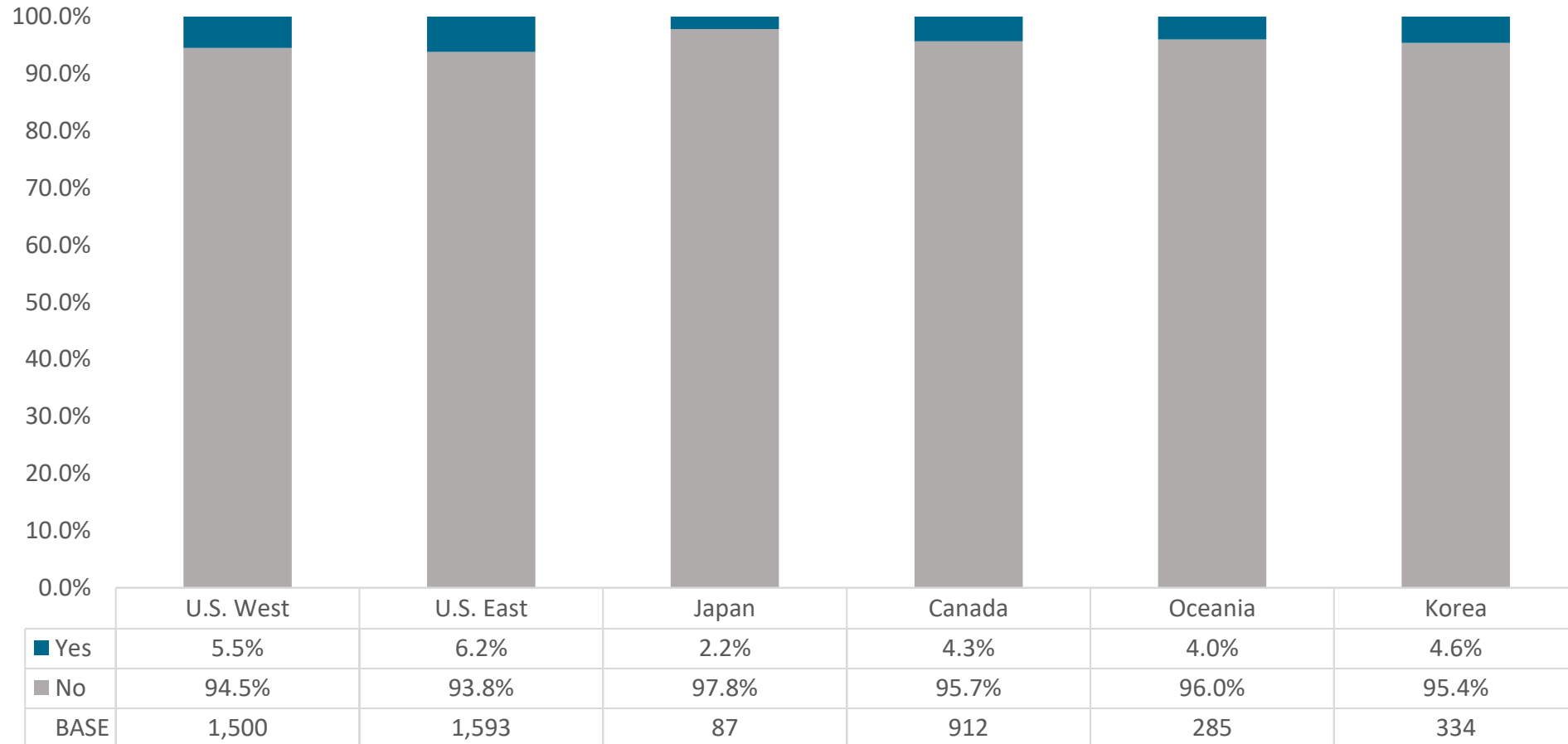
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	93.0%	93.0%	97.7%	96.1%	97.6%	95.7%
Airport shuttle	12.9%	15.4%	17.4%	15.5%	32.0%	11.1%
Trolley	2.7%	3.6%	30.5%	3.7%	9.8%	21.2%
Public bus	5.1%	4.9%	31.1%	12.4%	23.0%	12.4%
Tour bus/ tour van	6.9%	15.0%	11.5%	9.1%	20.5%	23.7%
Taxi/ limo	7.3%	10.0%	40.8%	15.0%	36.8%	22.3%
Rental car	70.9%	68.8%	33.1%	71.0%	37.9%	55.2%
Ride share	20.0%	21.7%	22.1%	20.3%	39.0%	20.8%
Car share (i.e. Hui, Turo)	7.2%	5.8%	1.1%	5.7%	3.1%	3.0%
Bicycle rental	2.1%	1.9%	3.5%	2.8%	0.0%	3.0%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	34.4%	34.1%	17.3%	25.6%	12.2%	21.3%
Visit friends/ family	32.6%	31.1%	16.1%	23.3%	11.1%	19.5%
Volunteer non-profit	3.0%	4.0%	2.3%	3.4%	1.5%	2.0%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

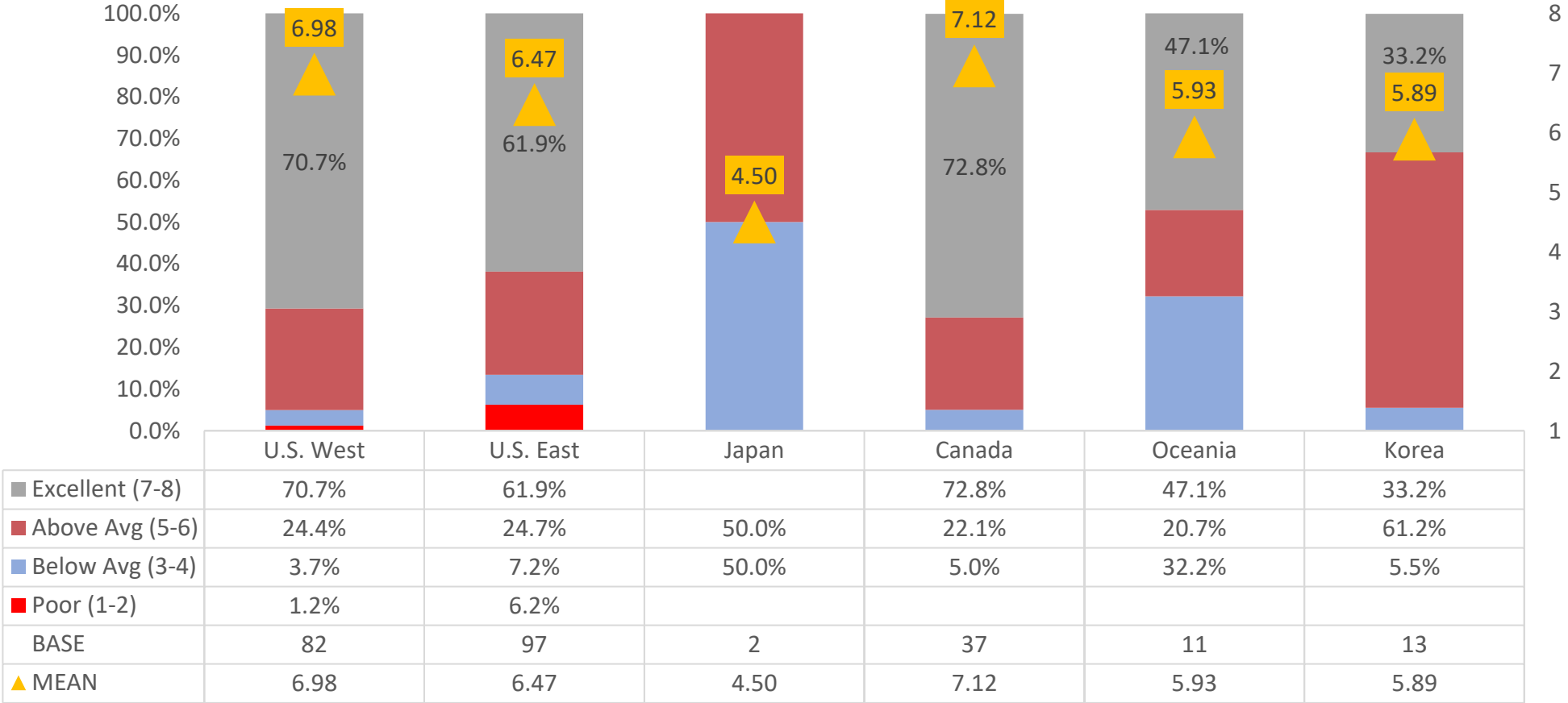


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Mobility aid	76.8%	73.7%	50.0%	76.7%	91.9%	22.2%
Personal assistance	19.5%	19.2%	0.0%	9.8%	26.4%	11.2%
Other	3.7%	4.1%	0.0%	8.1%	0.0%	0.0%
NA- No one needed assistance	1.2%	3.0%	50.0%	2.7%	0.0%	50.1%
Orientation and Mobility Assistance	3.7%	1.0%	0.0%	0.0%	0.0%	5.5%
Disabled parking/ placard	2.4%	0.0%	0.0%	2.7%	8.1%	0.0%
Ambulance/ Hospital/ Medical visit	2.4%	0.0%	0.0%	2.7%	0.0%	0.0%
Print material in alternate format	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	1.0%	0.0%	0.0%	0.0%	5.5%
Lift equipped van	0.0%	1.0%	0.0%	0.0%	0.0%	5.5%
No help was offered	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
BASE	82	99	2	38	11	13

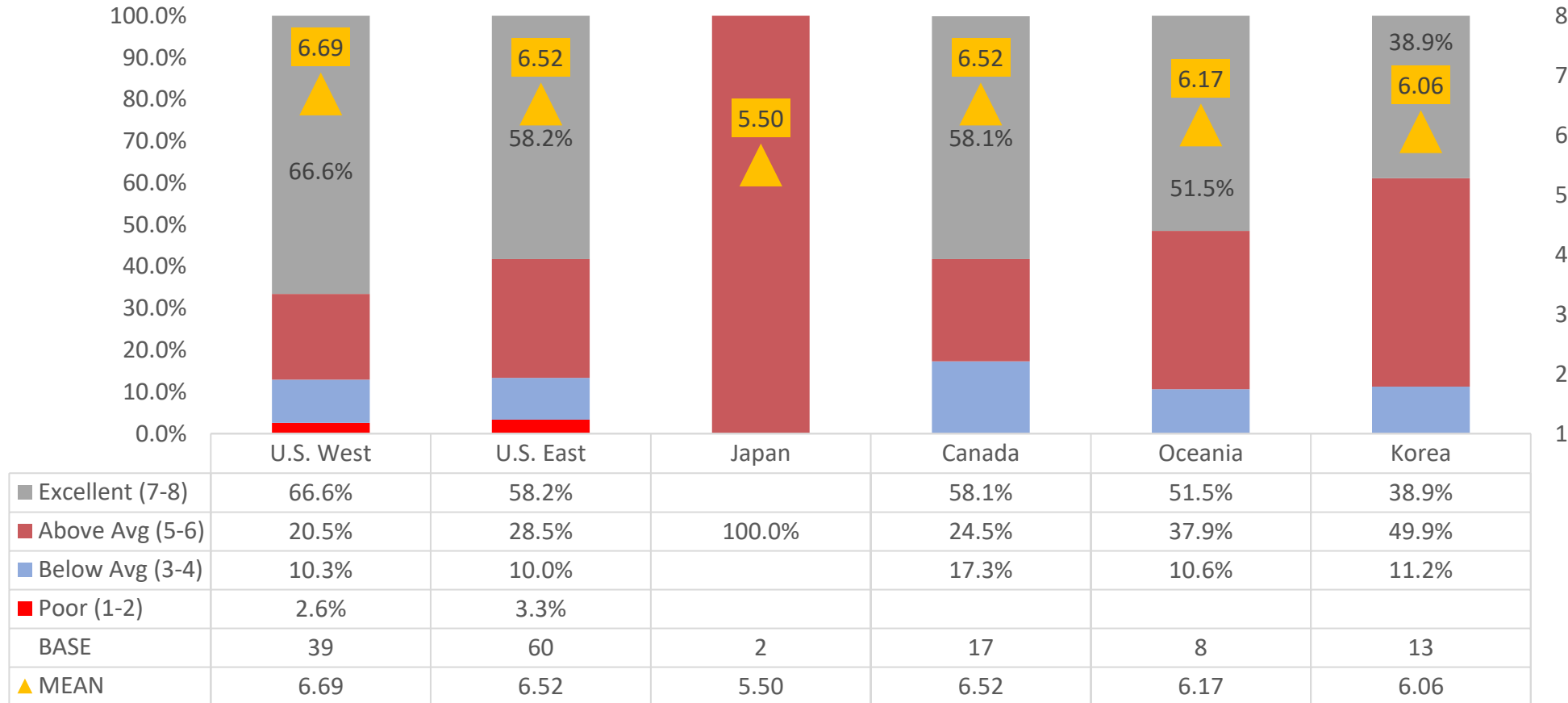
OVERALL ACCESSIBILITY - AIRPORTS

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



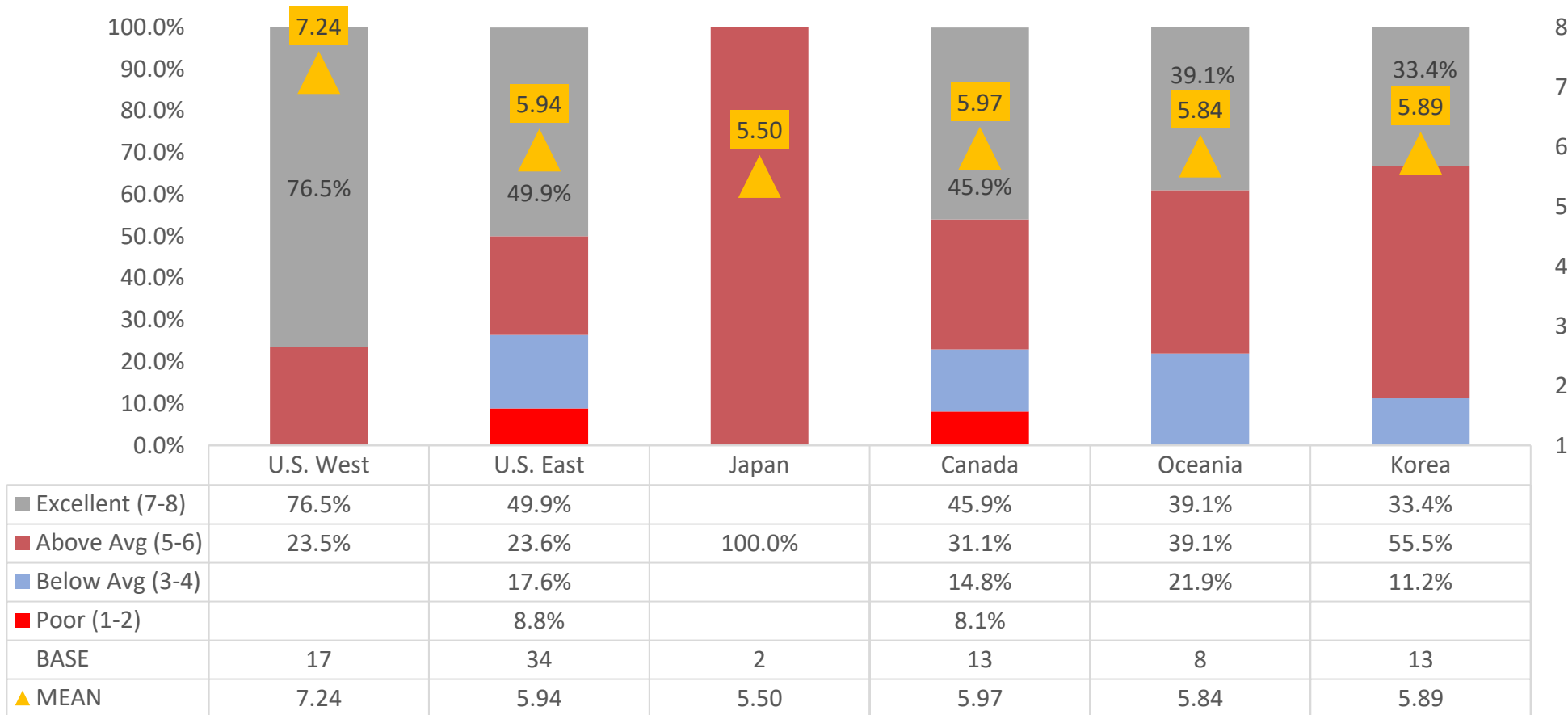
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



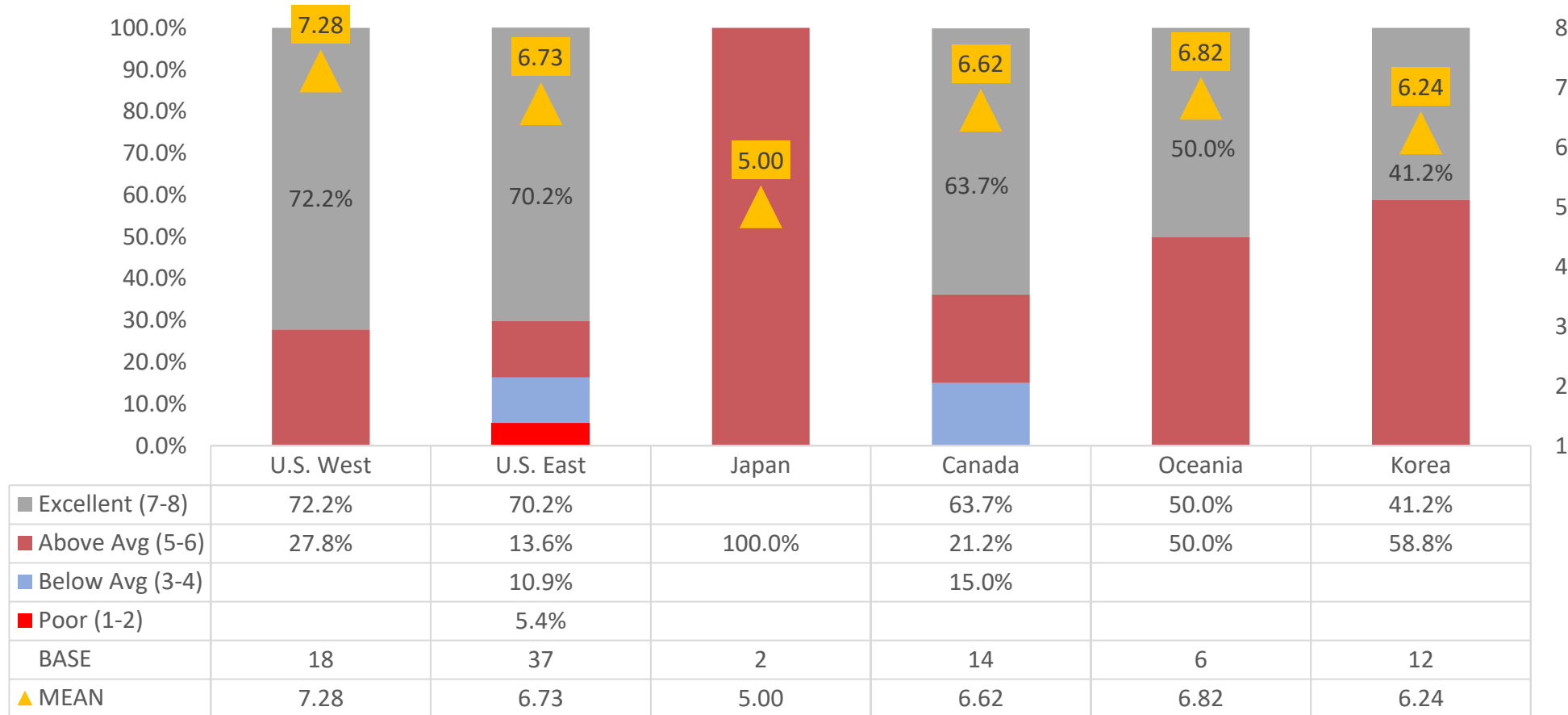
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



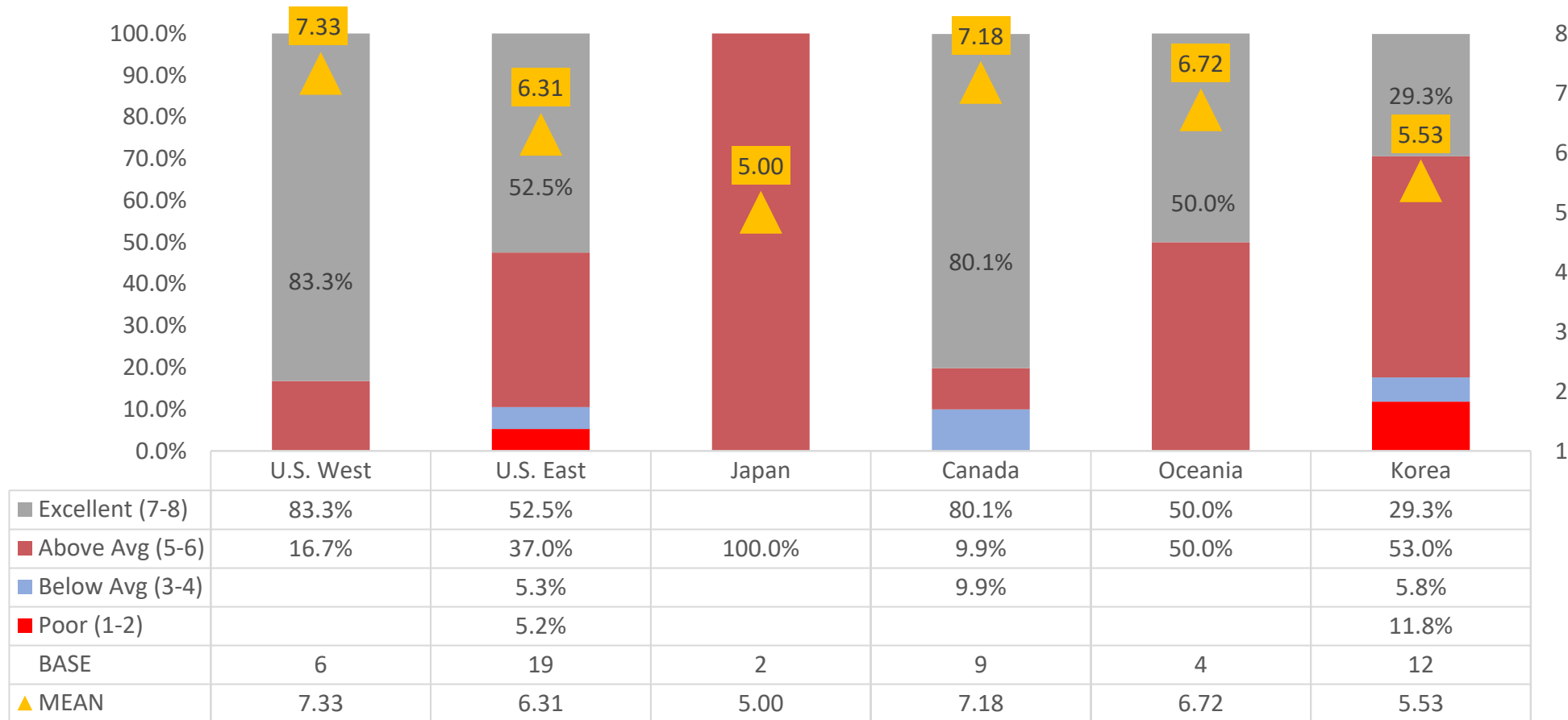
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



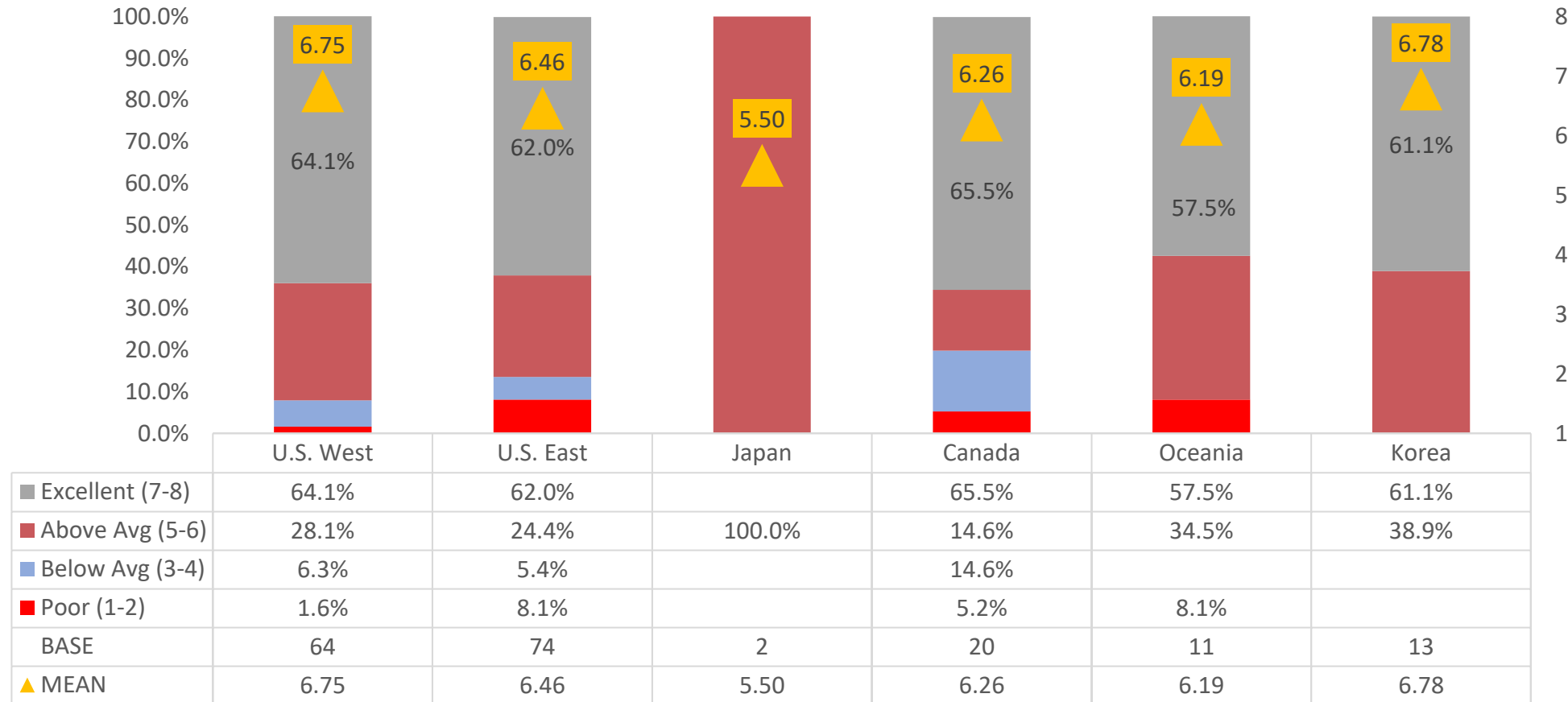
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



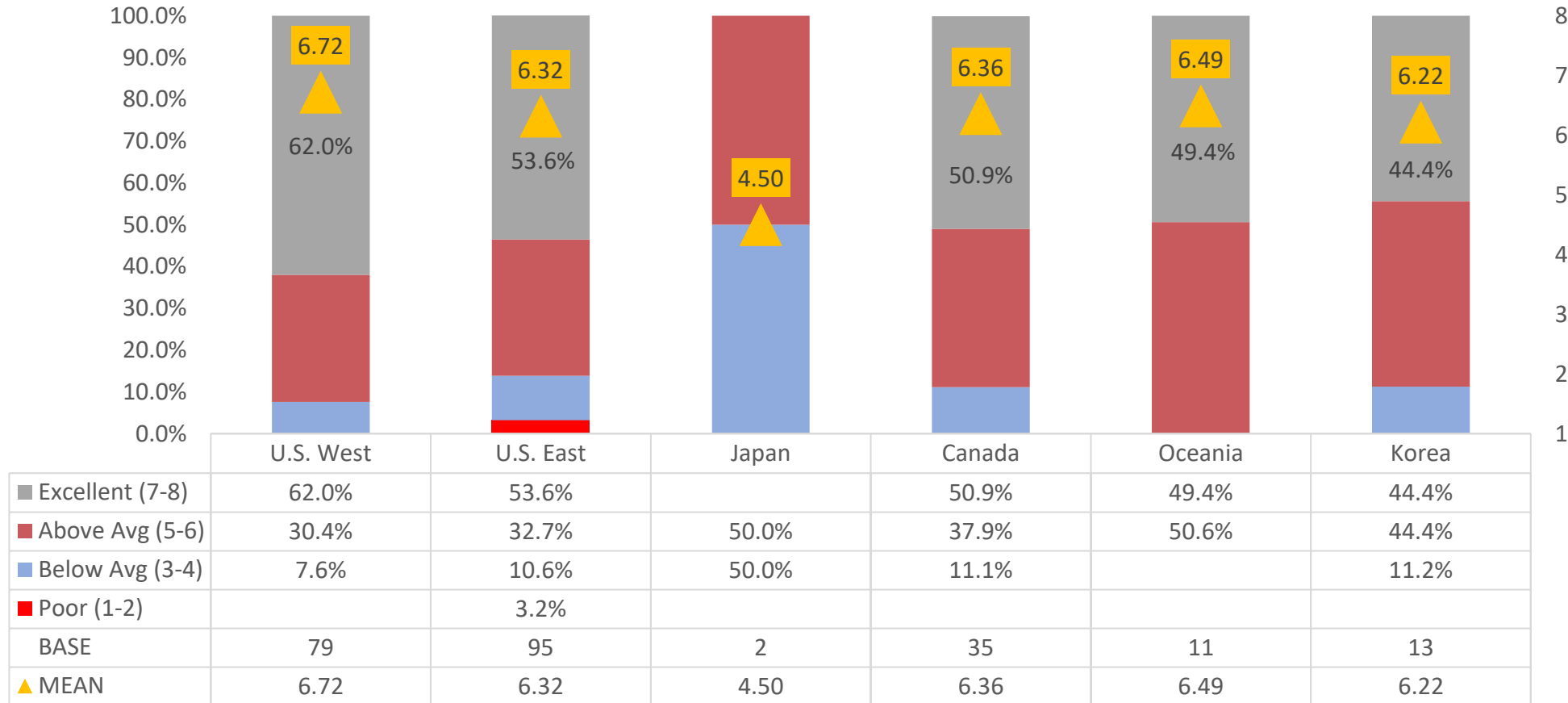
OVERALL ACCESSIBILITY - HOTELS

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



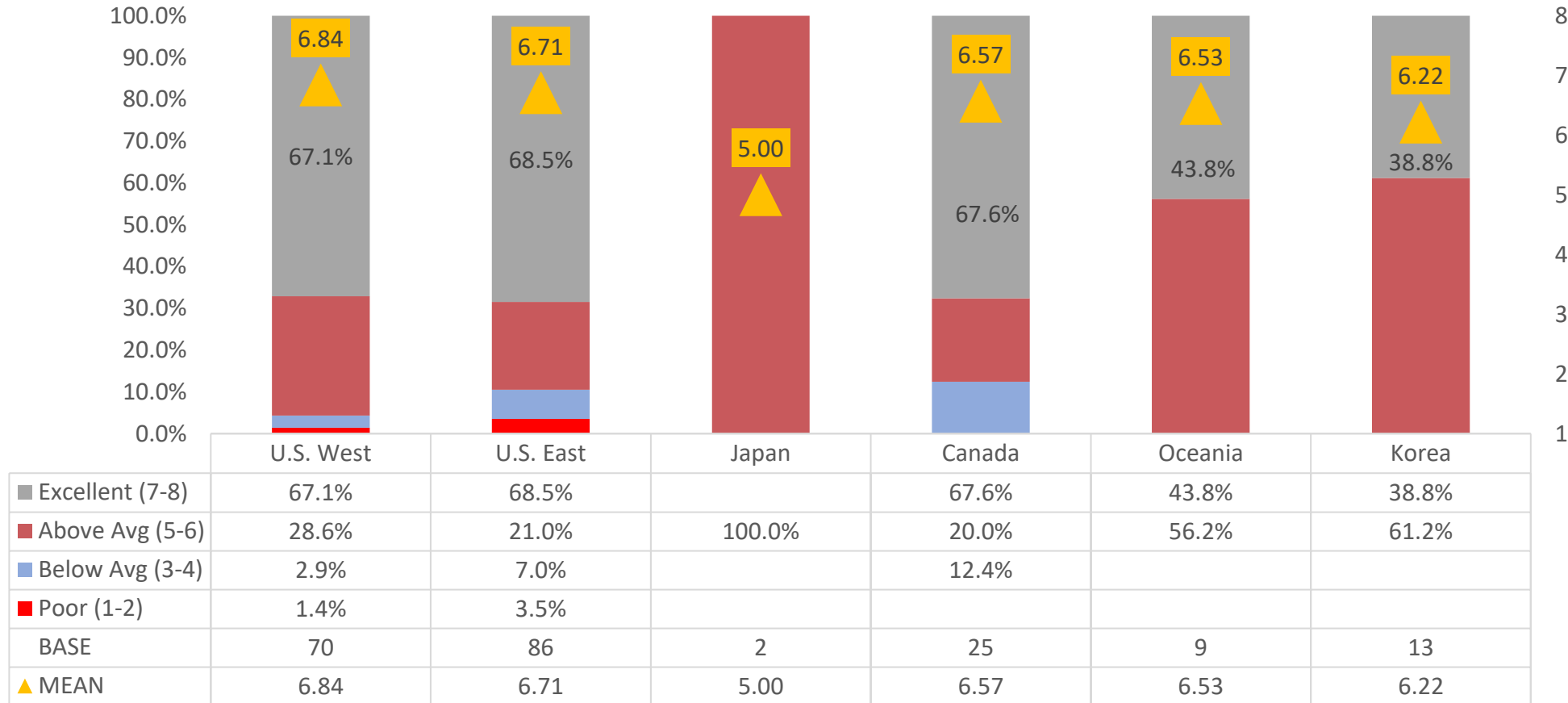
OVERALL ACCESSIBILITY - RESTAURANTS

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



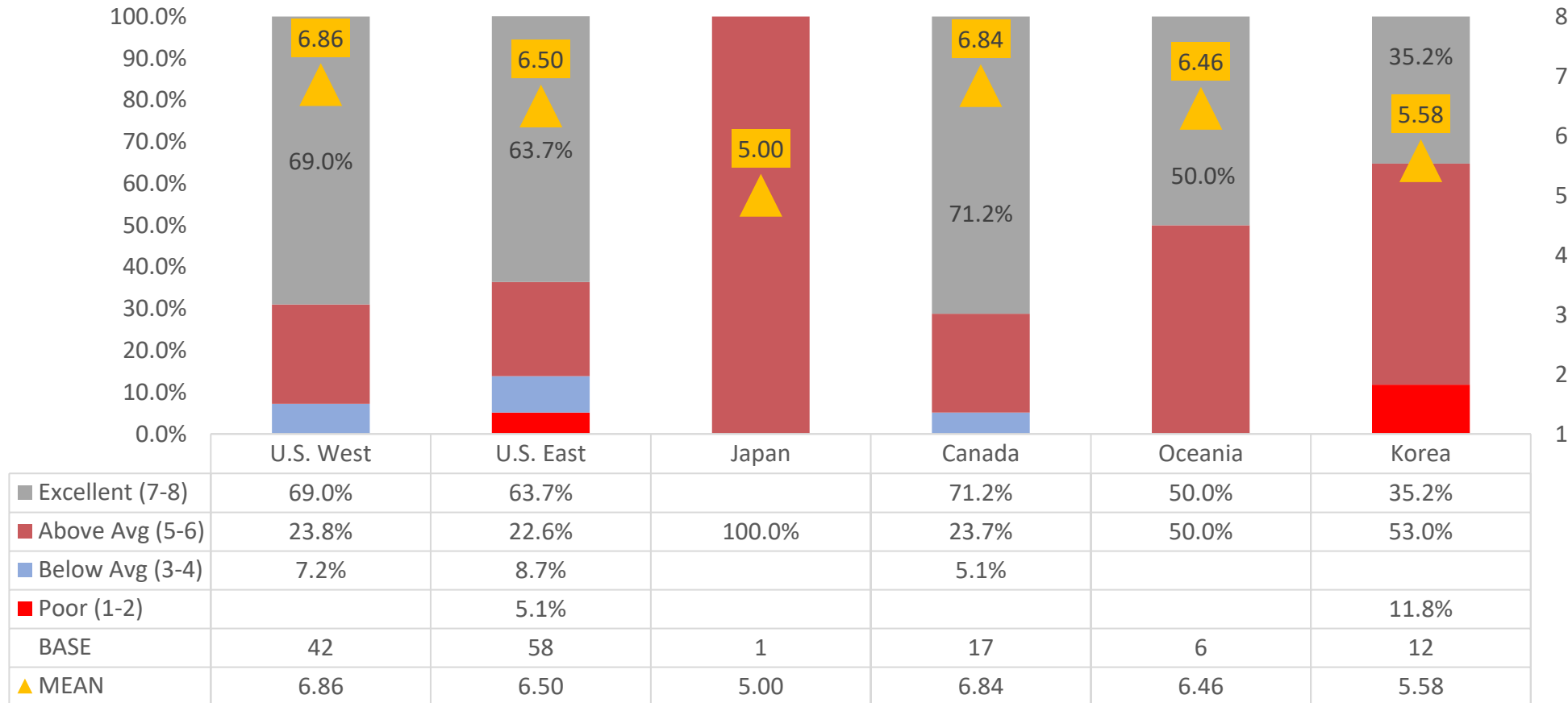
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



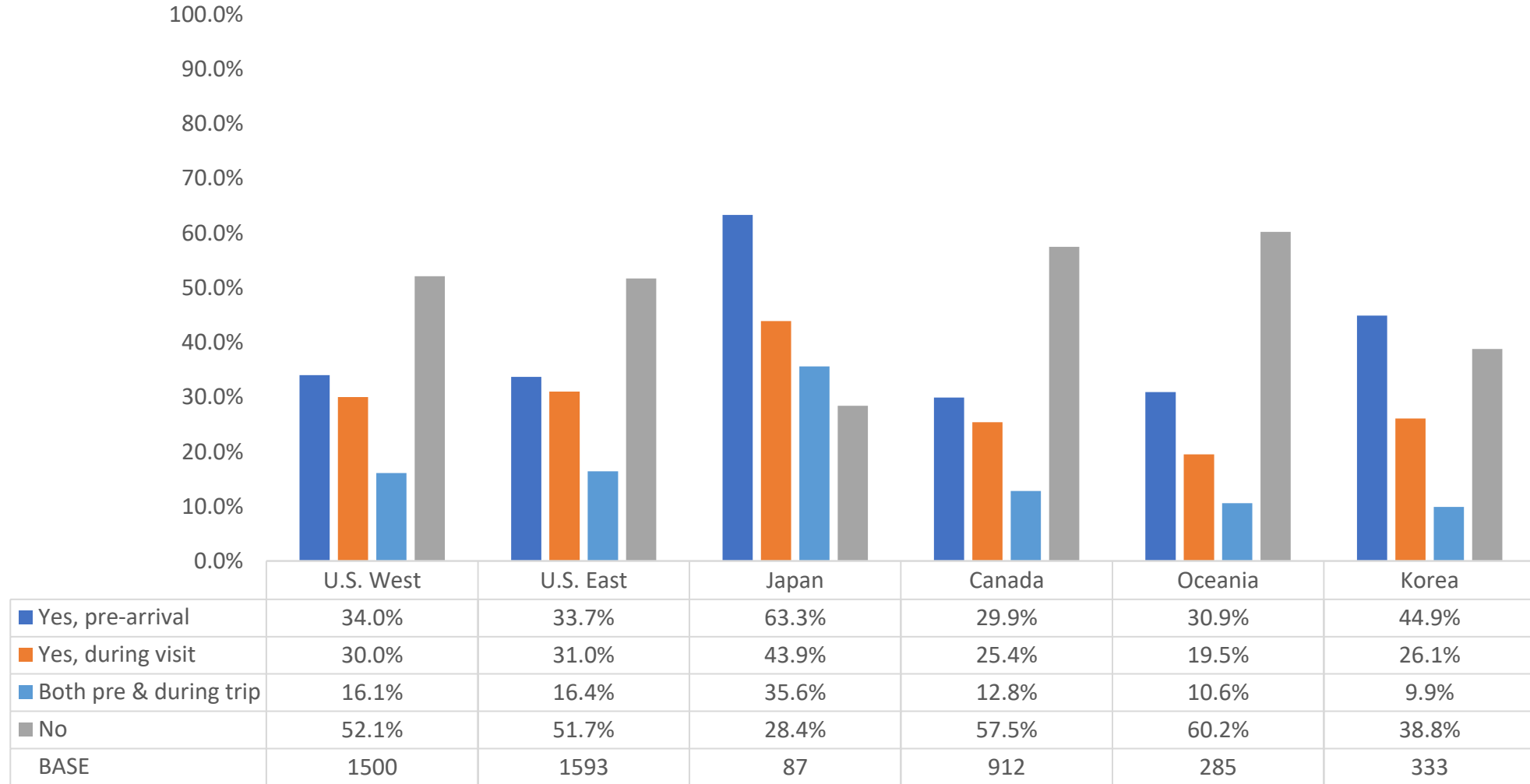
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

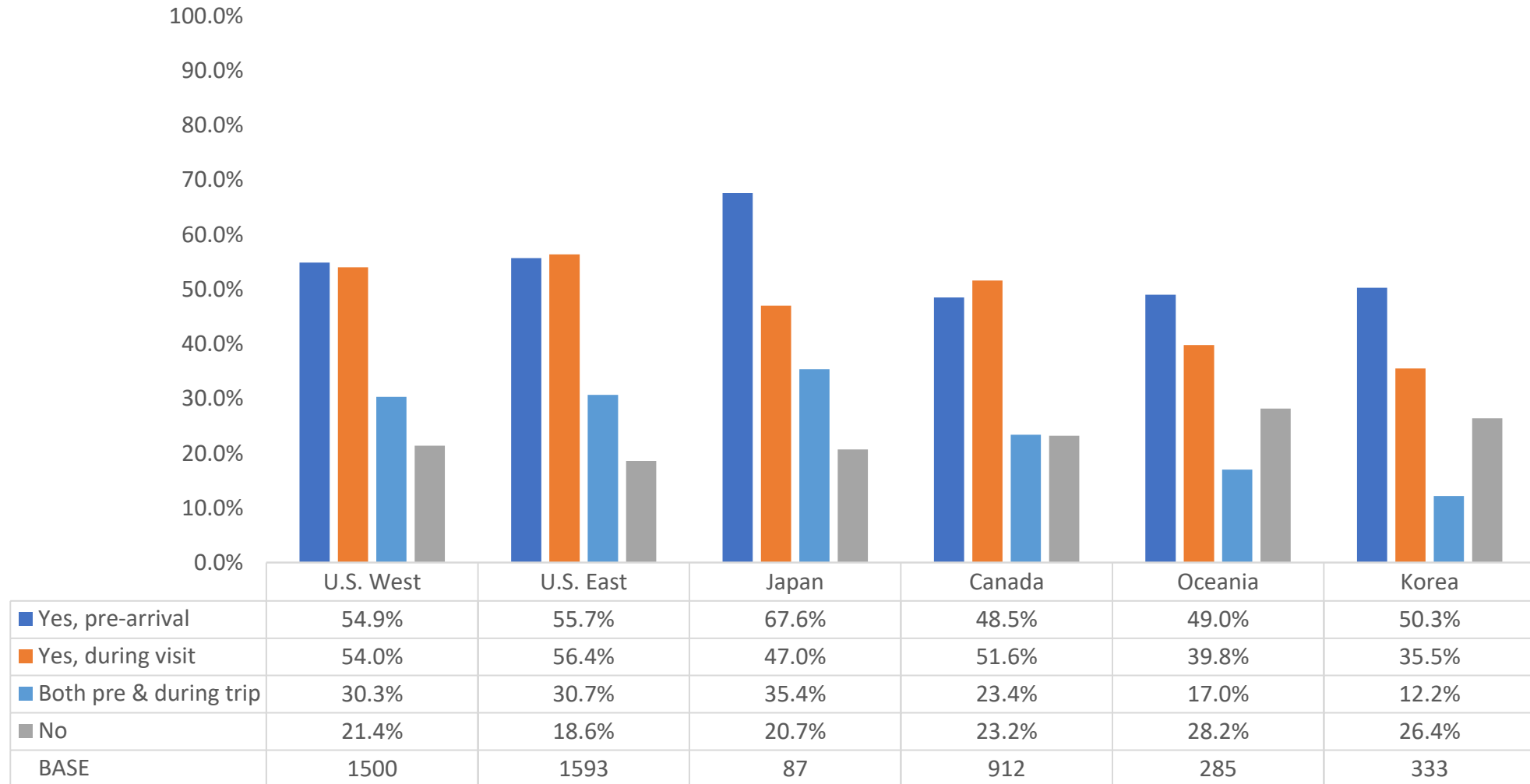


Section 4 – Alternative Messaging

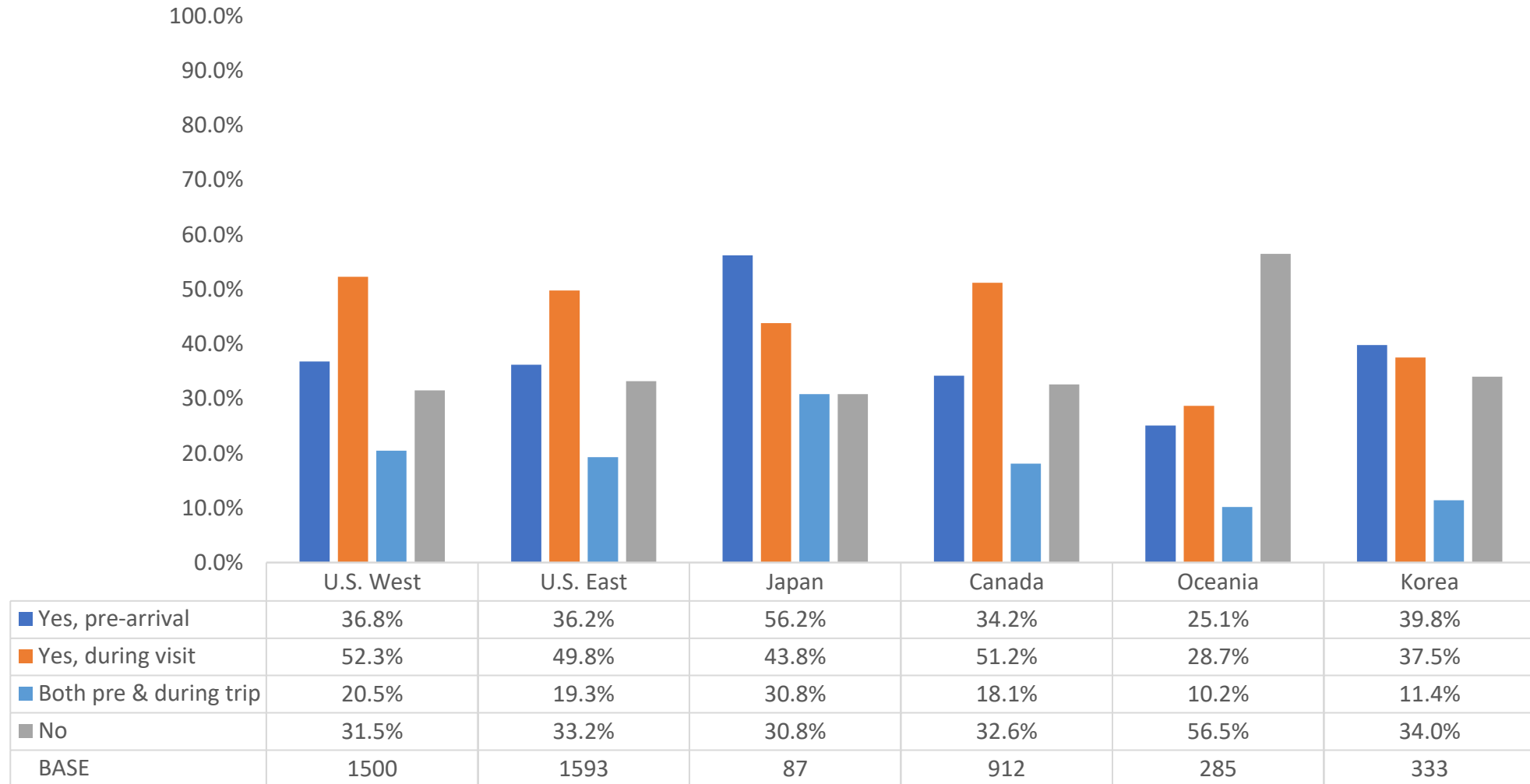
SAFE AND RESPONSIBLE TRAVEL



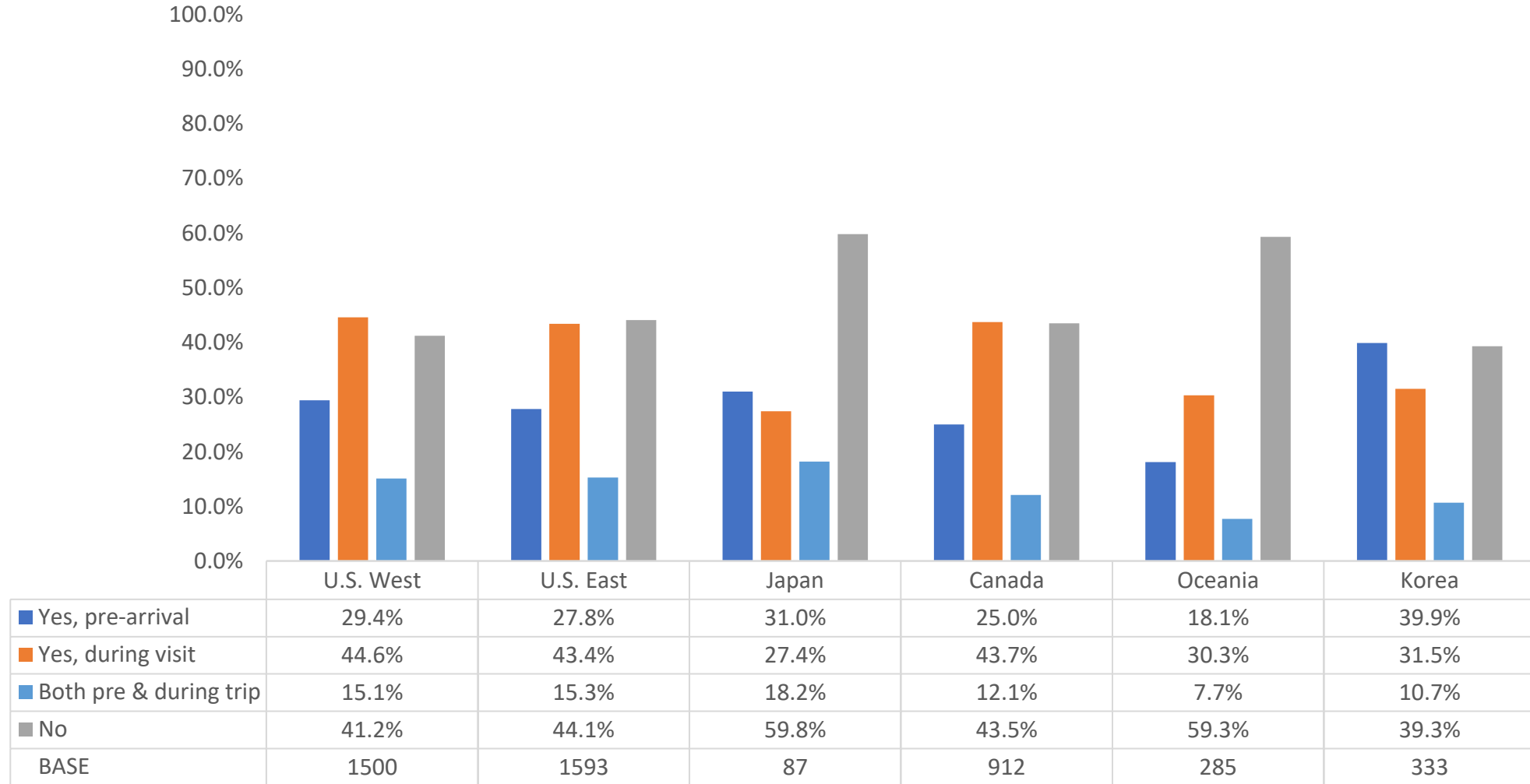
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE, AND ENVIRONMENT



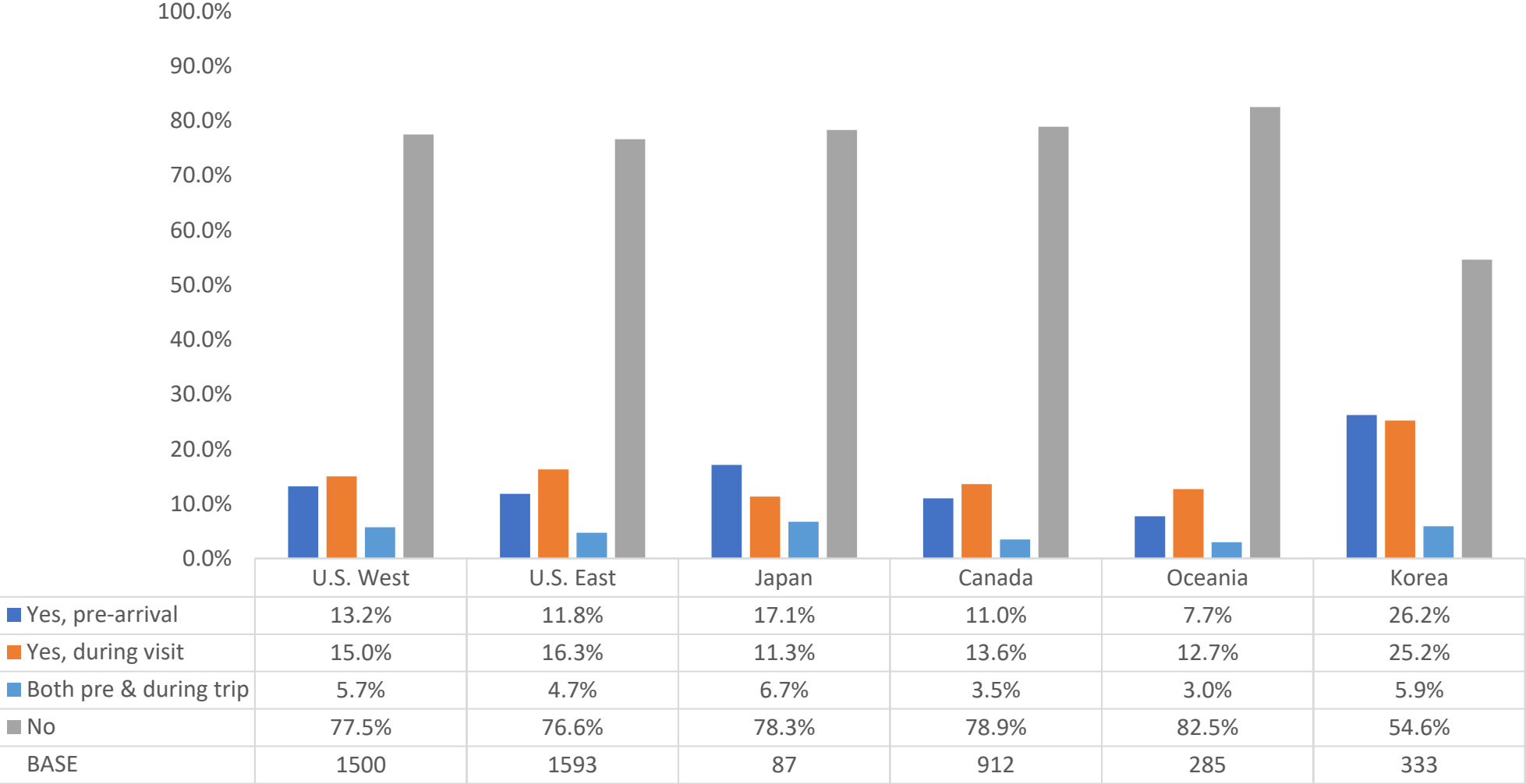
OCEAN AND HIKING SAFETY



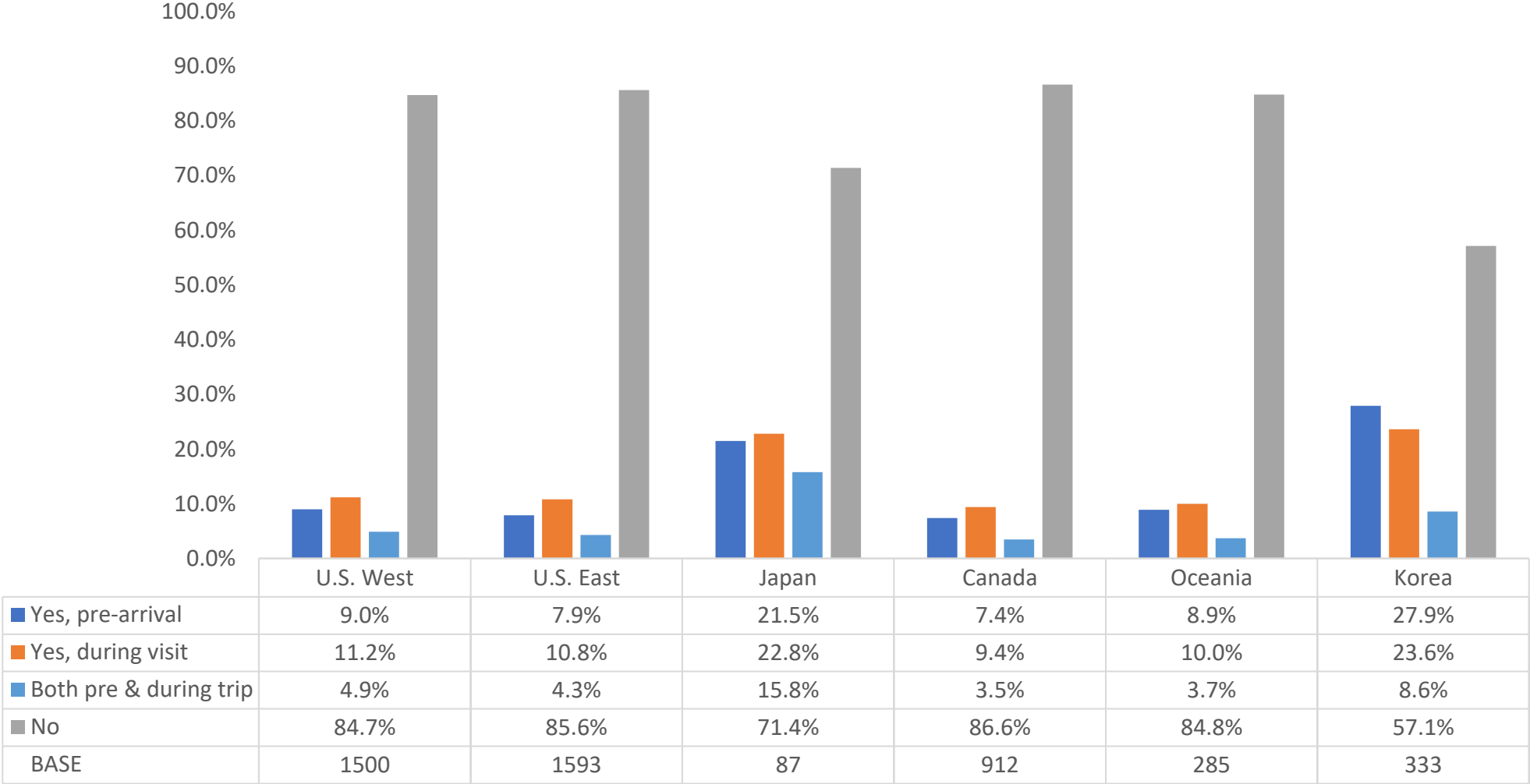
SUPPORT LOCAL/ SHOP LOCAL



VOLUNTEER/ GIVE-BACK OPPORTUNITIES



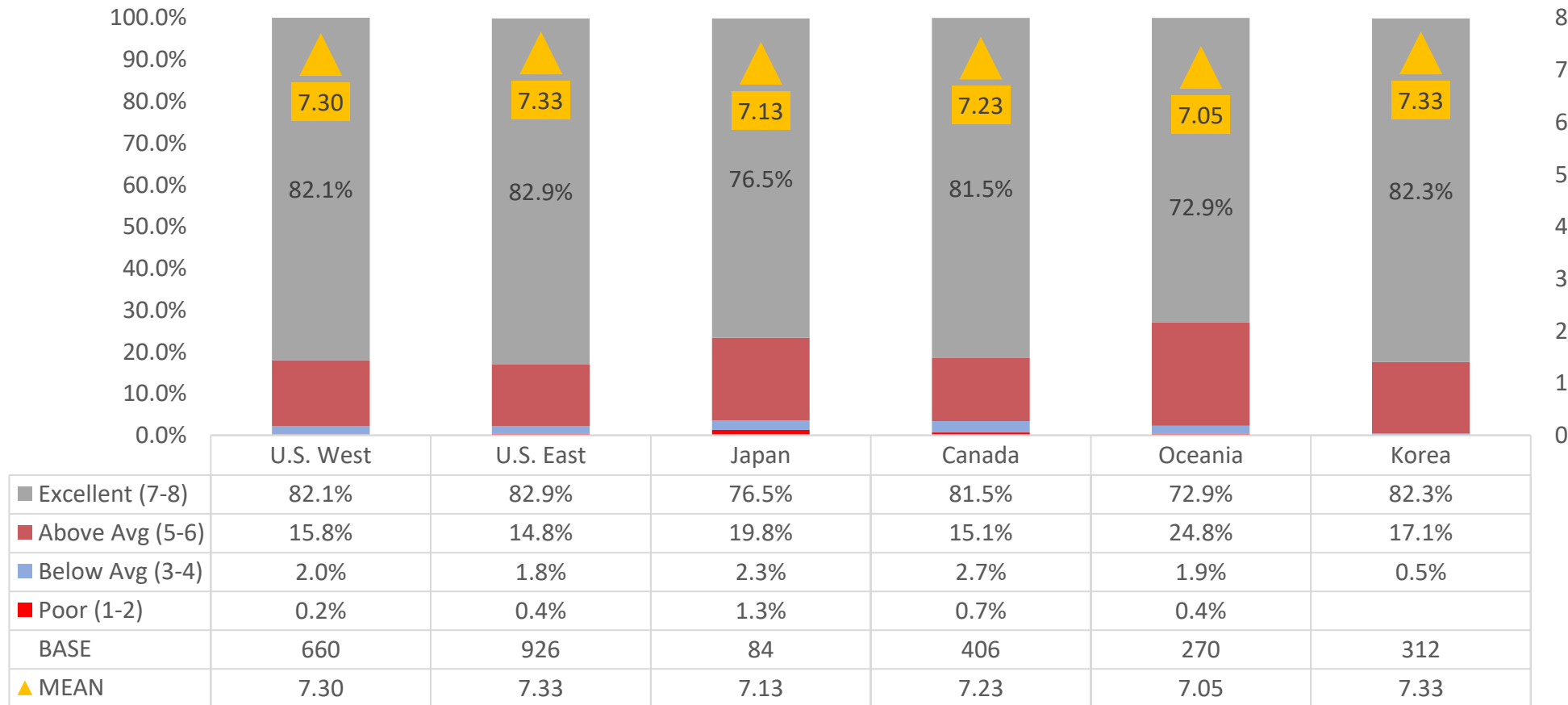
MĀLAMA HAWAI'I



Section 5 – O'AHU

SATISFACTION - O'AHU

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



SATISFACTION - O'AHU

- **Islands visited:** Visitors from U.S. East 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.
- **Age:** Younger travelers under the age of 35 from U.S. West and Japan gave statistically higher scores than older visitors from these visitor markets when asked about their level of overall satisfaction with their stay on O'ahu.
- **Household income (\$ dollars):** Visitors from U.S. West and U.S. East that reside in homes in the lower income tier (<\$100K) gave statistically higher satisfaction scores when rating their overall experience on O'ahu.

SATISFACTION - O'AHU

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

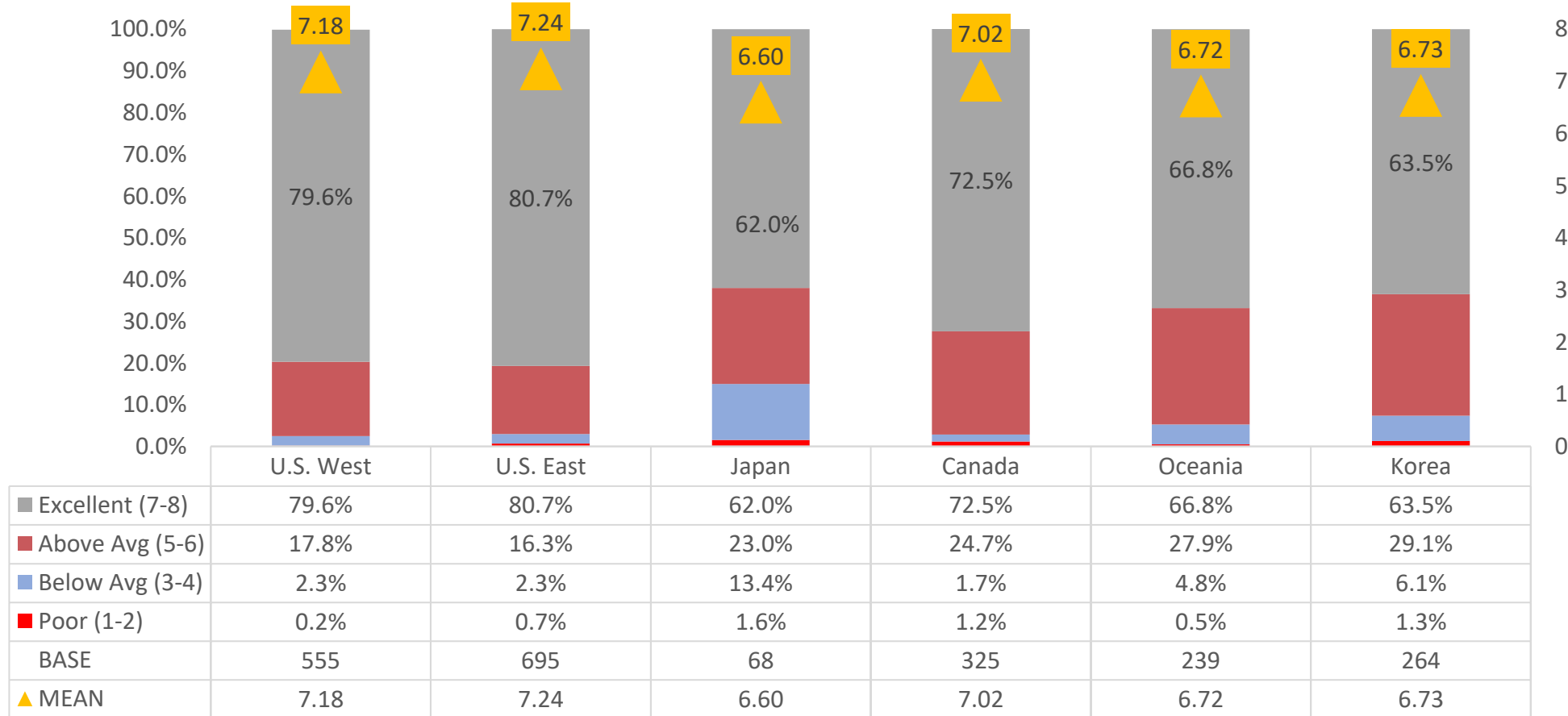
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	80.2%	81.1%	79.1%	79.5%	78.6%	80.6%	83.1%	82.1%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.4%	81.1%	83.0%	82.9%
Japan	72.4%	78.9%	72.1%	74.1%	76.3%			76.5%
Canada	75.7%	79.9%	76.2%	81.3%	76.3%		84.6%	81.5%
Oceania	76.8%	78.9%	74.0%	79.7%	72.8%			72.9%
Korea	80.0%	73.3%	67.0%	68.7%	78.2%			82.3%

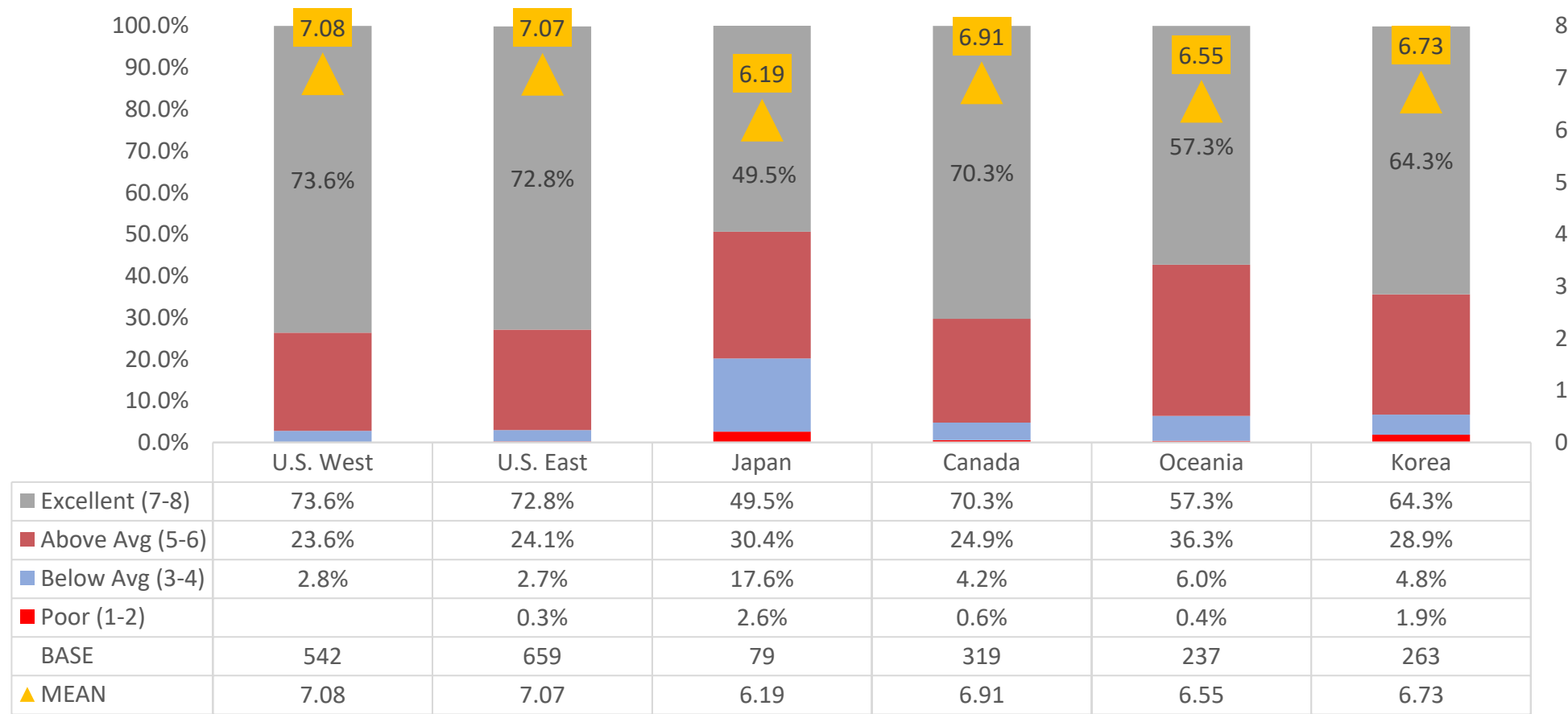
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



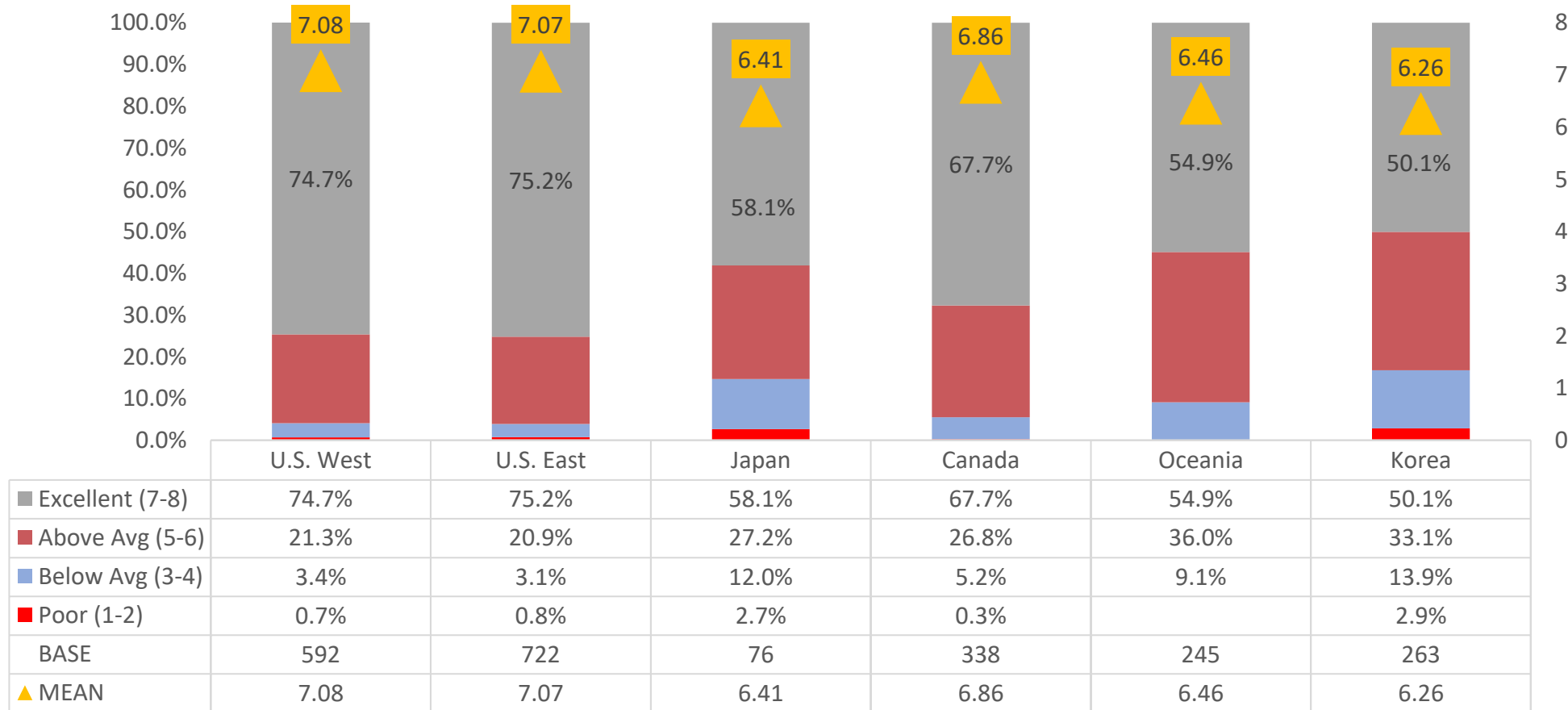
SHOPPING - O'AHU

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



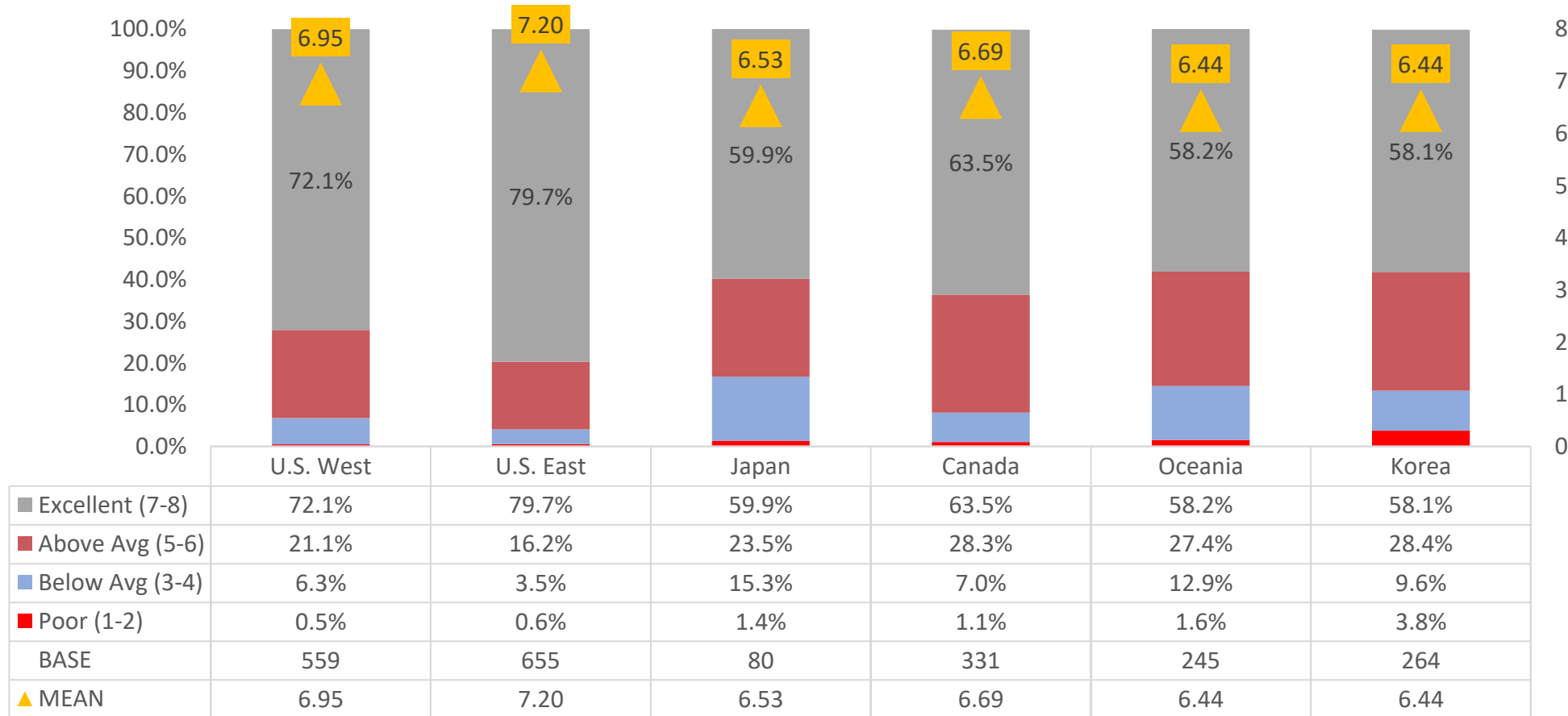
DINING/ FOOD & BEVERAGES - O'AHU

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



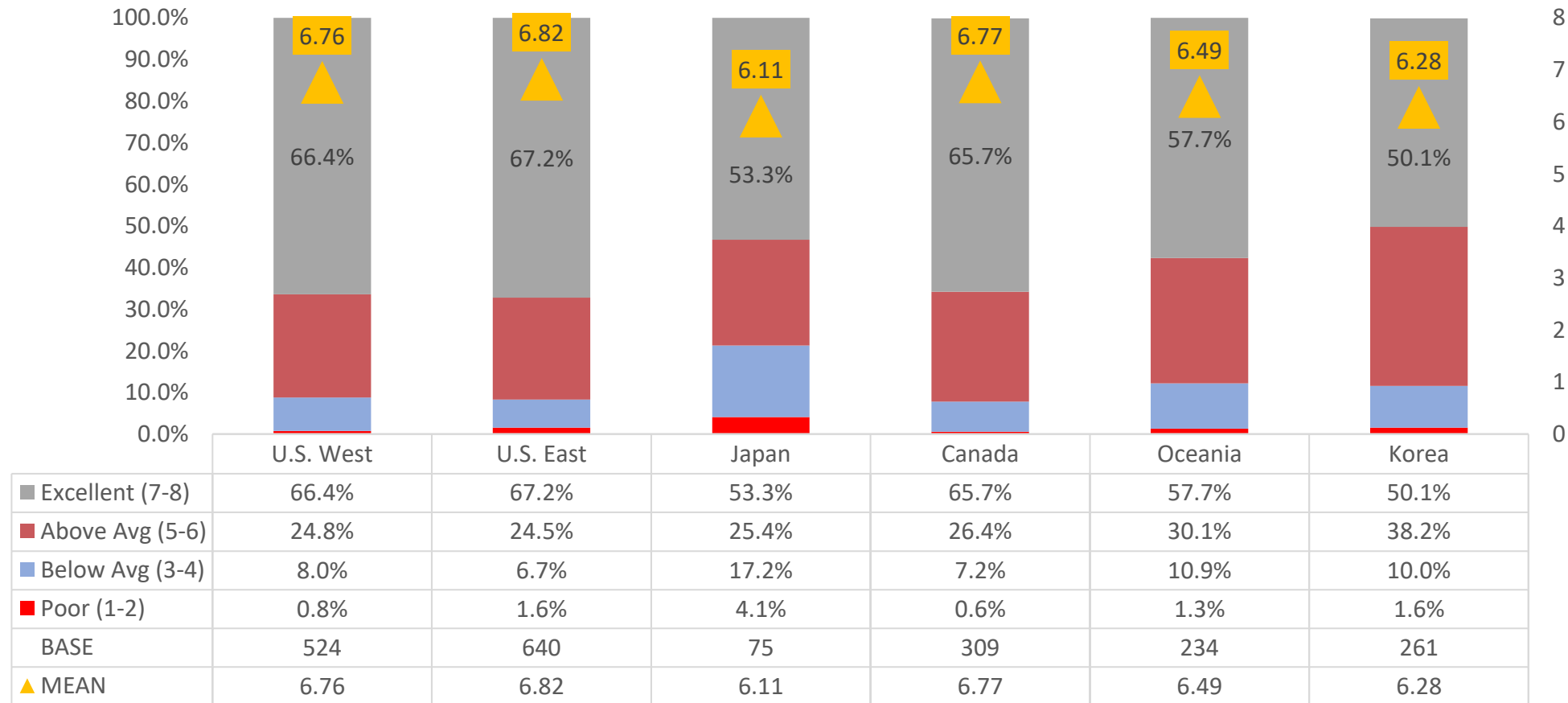
LODGING/ ACOMMODATIONS - O'AHU

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



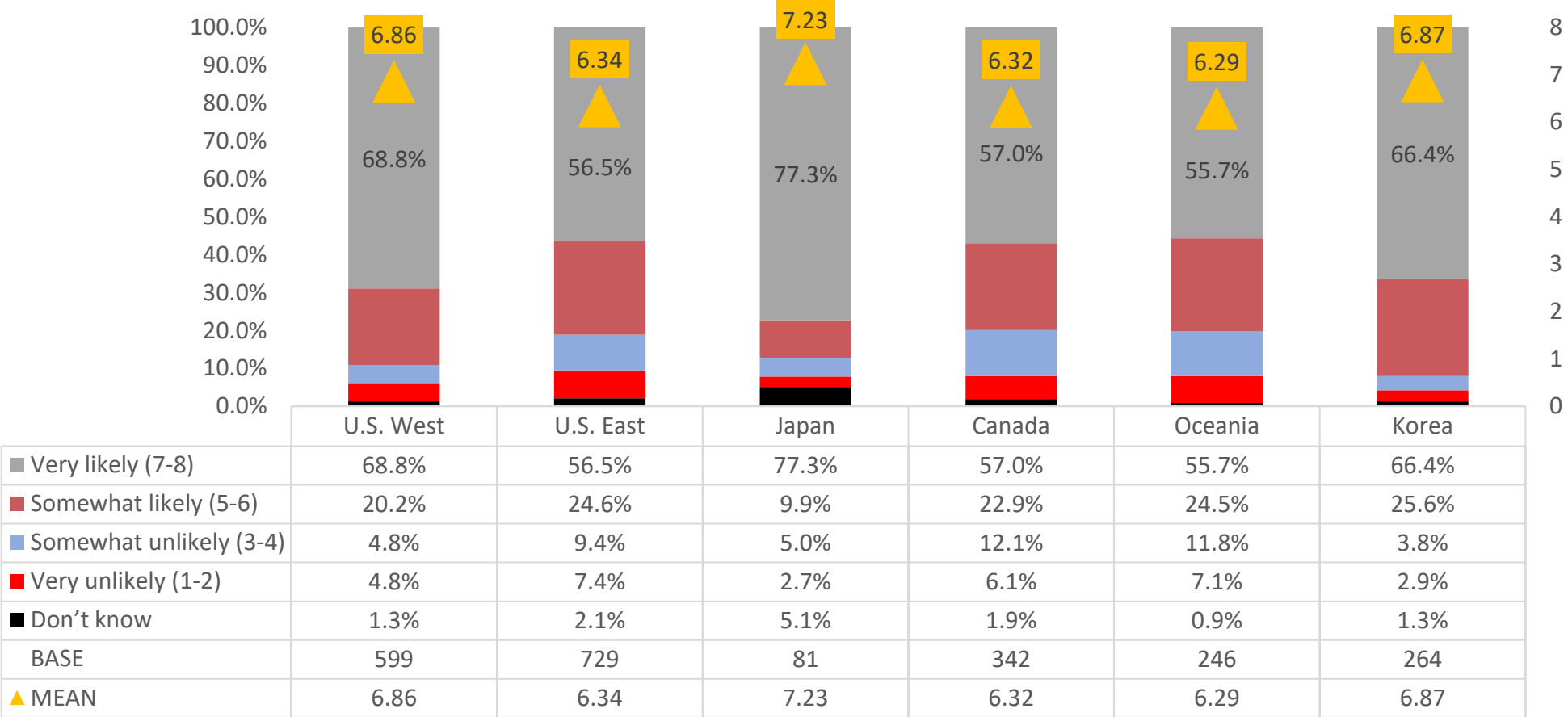
TRANSPORTATION ON ISLAND - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

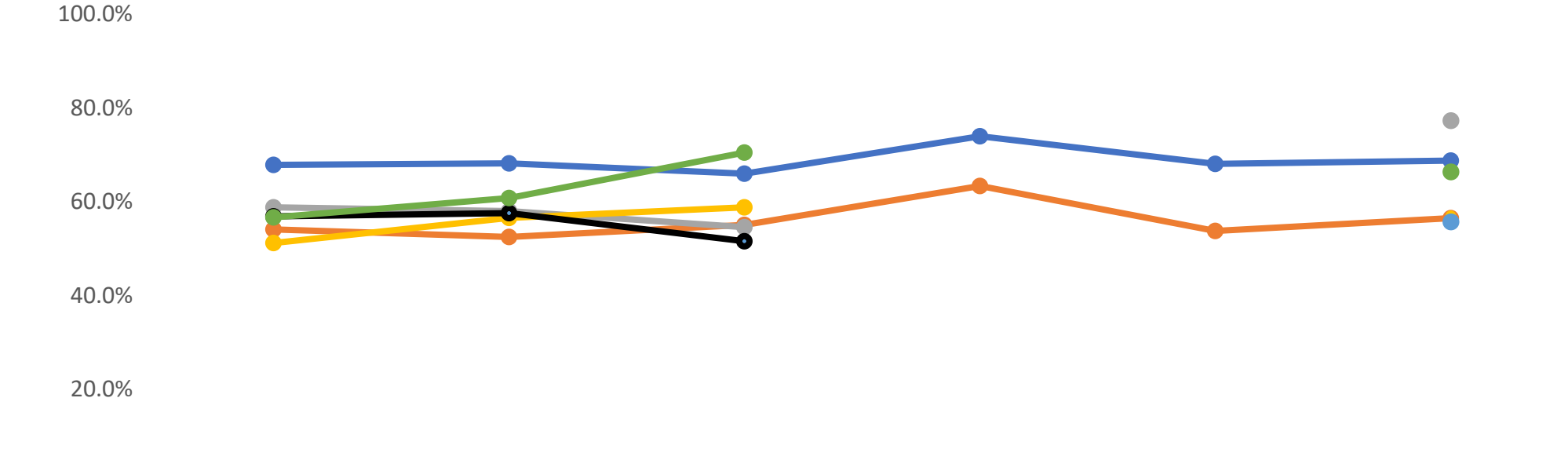
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



LIKELIHOOD OF RETURN VISIT - O'AHU

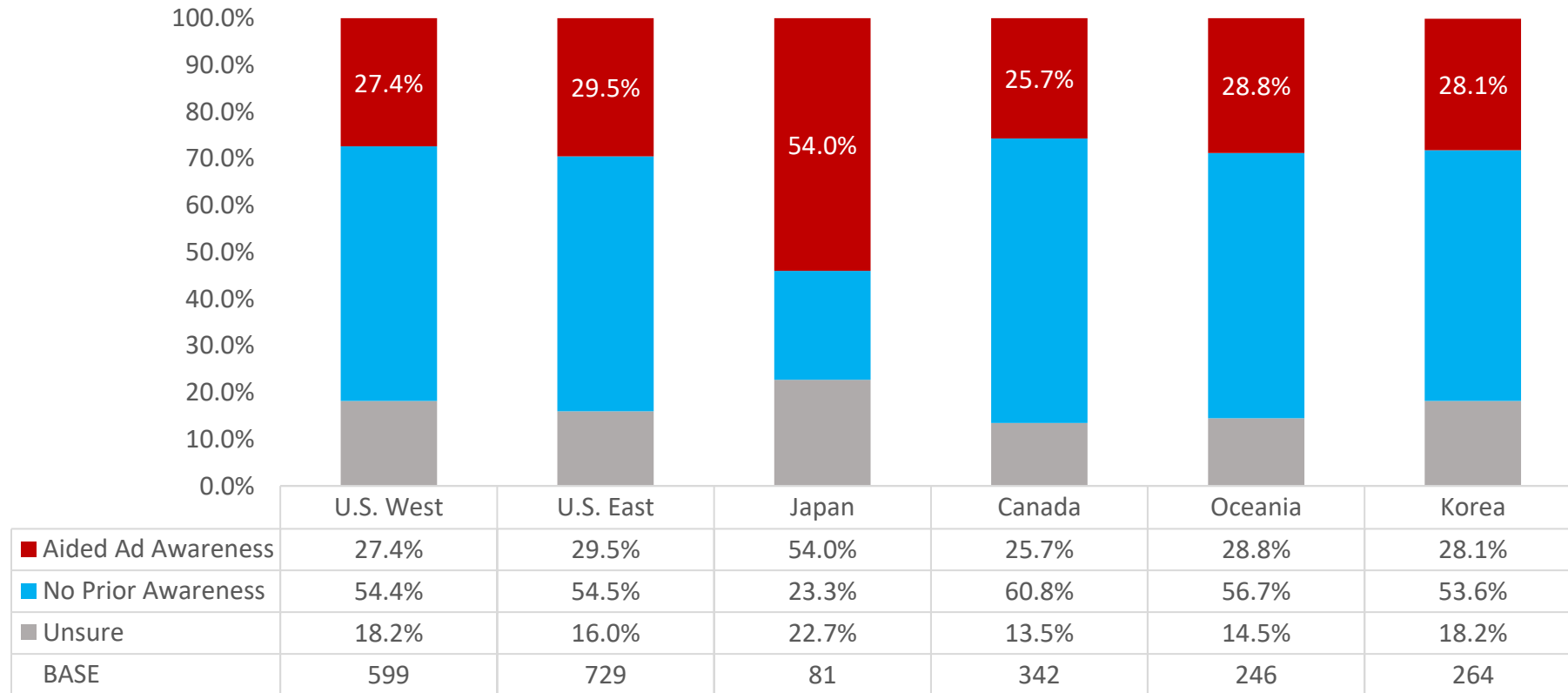
TOP BOX - VERY LIKELY (7-8)

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



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	67.9%	68.2%	66.0%	74.0%	68.1%	68.8%
U.S. East	54.1%	52.5%	55.1%	63.4%	53.8%	56.5%
Japan	58.8%	58.0%	54.6%			77.3%
Canada	51.2%	56.6%	58.8%		62.1%	57.0%
Oceania	56.9%	57.6%	51.6%			55.7%
Korea	56.7%	60.8%	70.5%			66.4%

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	37.6%	44.0%	37.1%	43.2%	38.7%	51.0%
Hawaiian cultural events	14.5%	13.7%	15.9%	13.3%	11.8%	3.2%
Outdoor or sporting activities and events	15.4%	12.9%	13.7%	18.5%	11.1%	7.7%
Social media posts and videos	14.5%	10.2%	28.4%	18.1%	15.0%	17.2%
Hawaiian music	6.0%	6.3%	17.3%	6.8%	8.7%	1.0%
Television programs or movies filmed in Hawai'i	10.5%	11.4%	42.0%	15.8%	21.1%	11.8%
BASE	599	729	81	342	246	264

ATTRACTIONS- O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Atlantis Submarine & Cruises	2.5%	4.7%	2.4%	1.7%	3.0%	3.8%
Bernice P. Bishop Museum	5.3%	4.1%	7.4%	4.0%	0.8%	3.5%
Byodo-In Temple	9.2%	9.0%	2.4%	11.4%	4.8%	1.6%
Chinatown & Honolulu Art District	13.4%	11.7%	14.7%	14.8%	9.6%	5.8%
Diamond Head State Monument	23.0%	31.2%	31.6%	43.4%	31.4%	43.3%
Dole Plantation	32.7%	35.4%	11.0%	33.4%	20.6%	38.4%
Foster Botanical Garden	3.7%	3.0%	2.6%	5.3%	1.9%	0.6%
Hale'iwa	23.0%	20.0%	23.1%	25.7%	9.1%	8.0%
Hanauma Bay Nature Reserve	9.7%	10.7%	6.0%	17.7%	6.8%	17.0%
Harold L. Lyon Arboretum	0.5%	1.1%	1.2%	0.3%	0.0%	1.3%
Hawai'i State Art Museum	0.8%	1.0%	1.2%	1.5%	1.8%	0.0%
Honolulu Museum of Art	1.7%	2.1%	3.6%	1.2%	3.4%	1.9%
Hawaiian Mission Houses, Historic Site and Archive	1.5%	1.2%	1.2%	0.6%	1.7%	1.0%
Hawai'i's Plantation Village	1.3%	1.6%	2.4%	2.4%	1.2%	2.9%
Honolulu Zoo	6.5%	5.8%	6.5%	16.1%	8.0%	9.0%

ATTRACTIONS- O'AHU

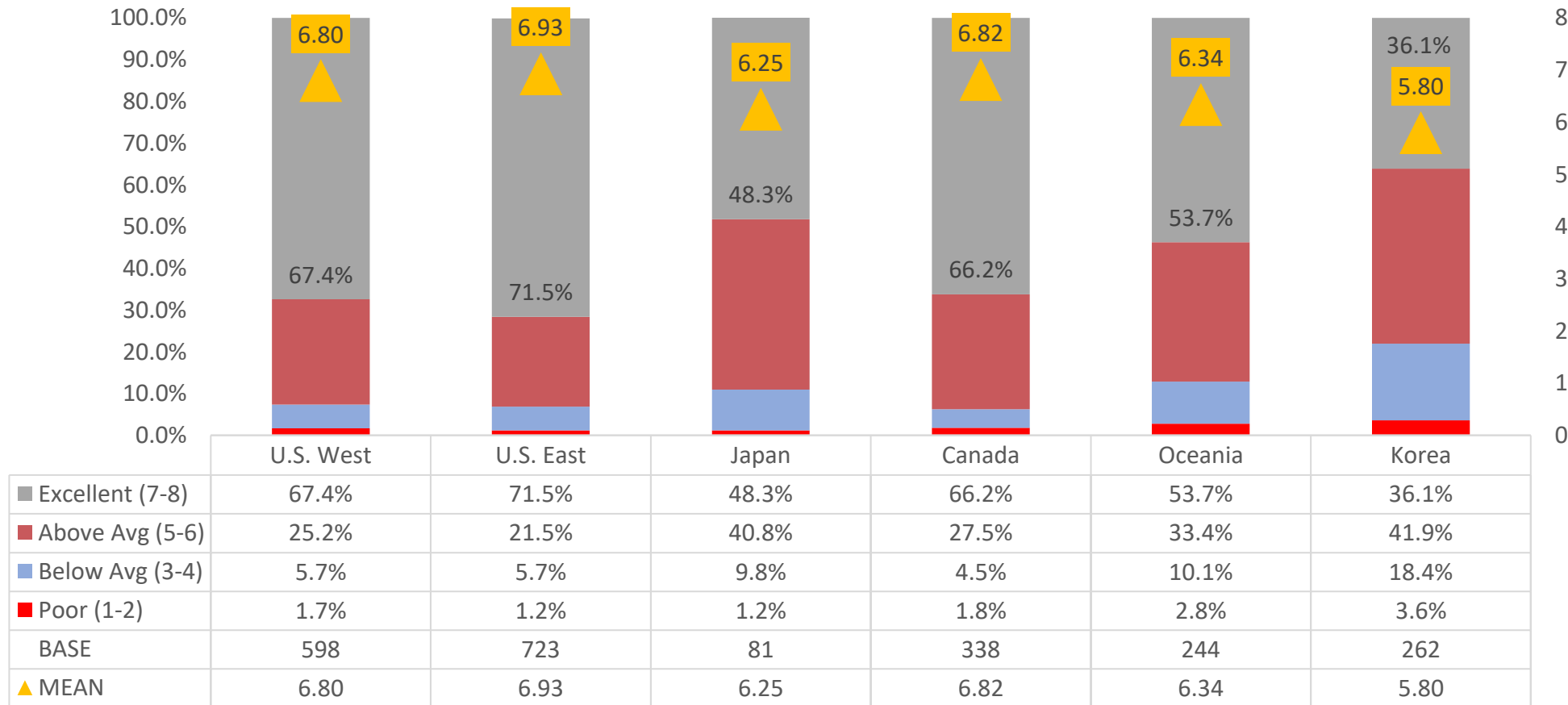
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Ho'omaluhia Botanical Garden	5.2%	7.0%	0.0%	6.7%	1.8%	2.9%
'Iolani Palace State Monument	4.7%	5.9%	11.3%	8.7%	3.9%	15.7%
Kailua Town	11.2%	11.7%	13.4%	14.9%	8.8%	5.1%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	6.3%	8.1%	6.2%	10.5%	2.9%	0.3%
Kaka'ako Street Art	2.2%	1.5%	8.7%	3.9%	0.8%	2.9%
Koko Head Crater Trail	5.2%	8.1%	3.6%	10.4%	4.6%	5.1%
Kualoa Private Nature Reserve	10.5%	13.6%	11.3%	14.1%	8.4%	16.0%
Lanikai or Kailua Beach	23.2%	26.2%	18.2%	36.8%	11.3%	18.0%
Mānoa Falls & Trail	9.5%	10.0%	8.6%	14.5%	6.2%	2.6%
National Memorial Cemetery of the Pacific	9.5%	11.8%	2.4%	7.4%	7.0%	1.6%
Nu'uuanu Pali Lookout	10.4%	12.4%	2.4%	14.6%	4.1%	7.1%
North Shore Beaches	44.4%	50.6%	19.4%	53.3%	32.2%	23.4%

ATTRACTIONS- O'AHU

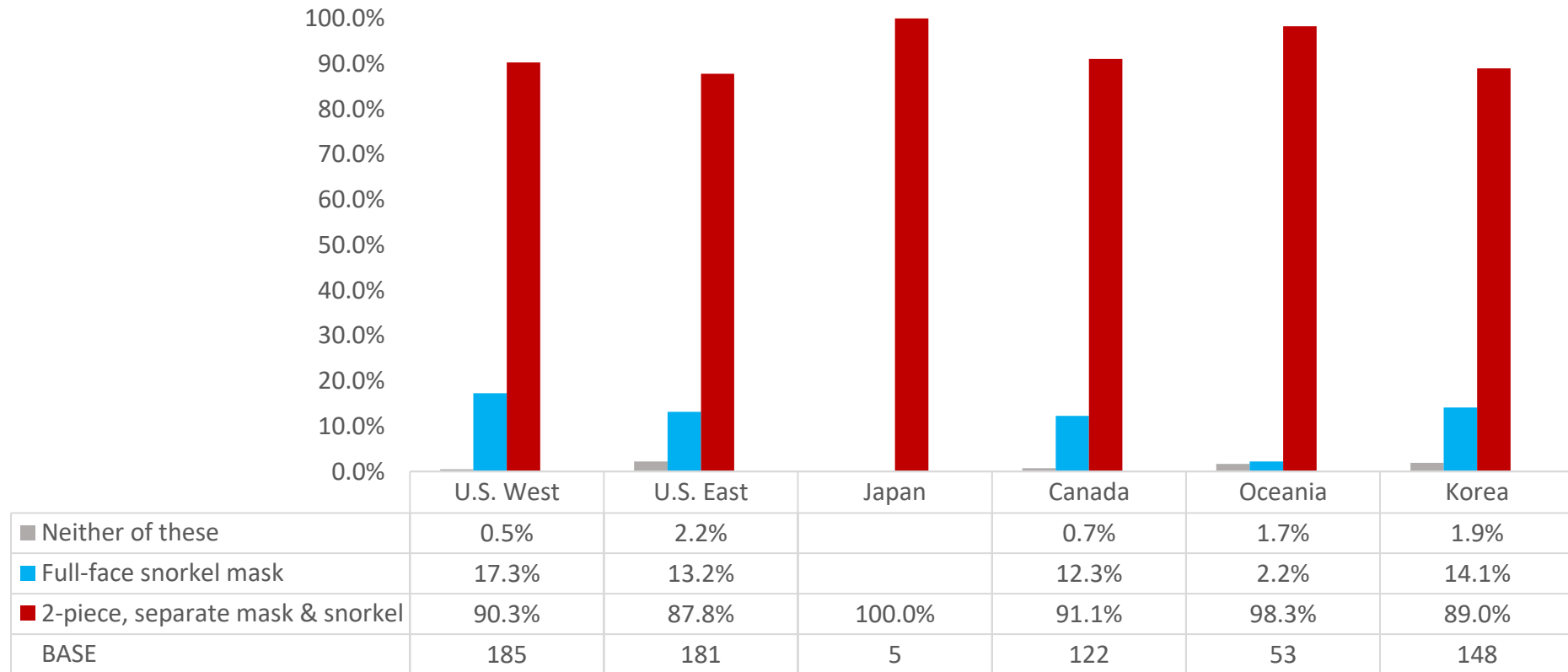
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Pearl Harbor National Memorial	32.7%	46.5%	6.0%	36.2%	32.7%	8.7%
Battleship Missouri Memorial	12.5%	19.7%	3.6%	14.1%	15.9%	3.9%
Pearl Harbor Aviation Museum	11.7%	16.4%	5.0%	12.0%	9.5%	5.5%
Pacific Fleet Submarine Museum	5.7%	7.2%	1.2%	5.7%	5.2%	1.9%
Polynesian Cultural Center	15.9%	11.8%	2.4%	17.4%	10.2%	5.4%
Queen Emma's Summer Palace	1.0%	2.7%	1.2%	1.8%	0.4%	1.3%
Sea Life Park Hawai'i	2.3%	4.0%	2.4%	3.7%	2.5%	1.6%
Waikiki Aquarium	2.8%	5.5%	3.8%	7.3%	2.5%	1.3%
Waimānalo Beach Park	9.7%	10.3%	3.8%	17.0%	7.7%	5.8%
Waimea Valley	19.4%	17.6%	3.6%	22.2%	12.6%	2.2%

DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



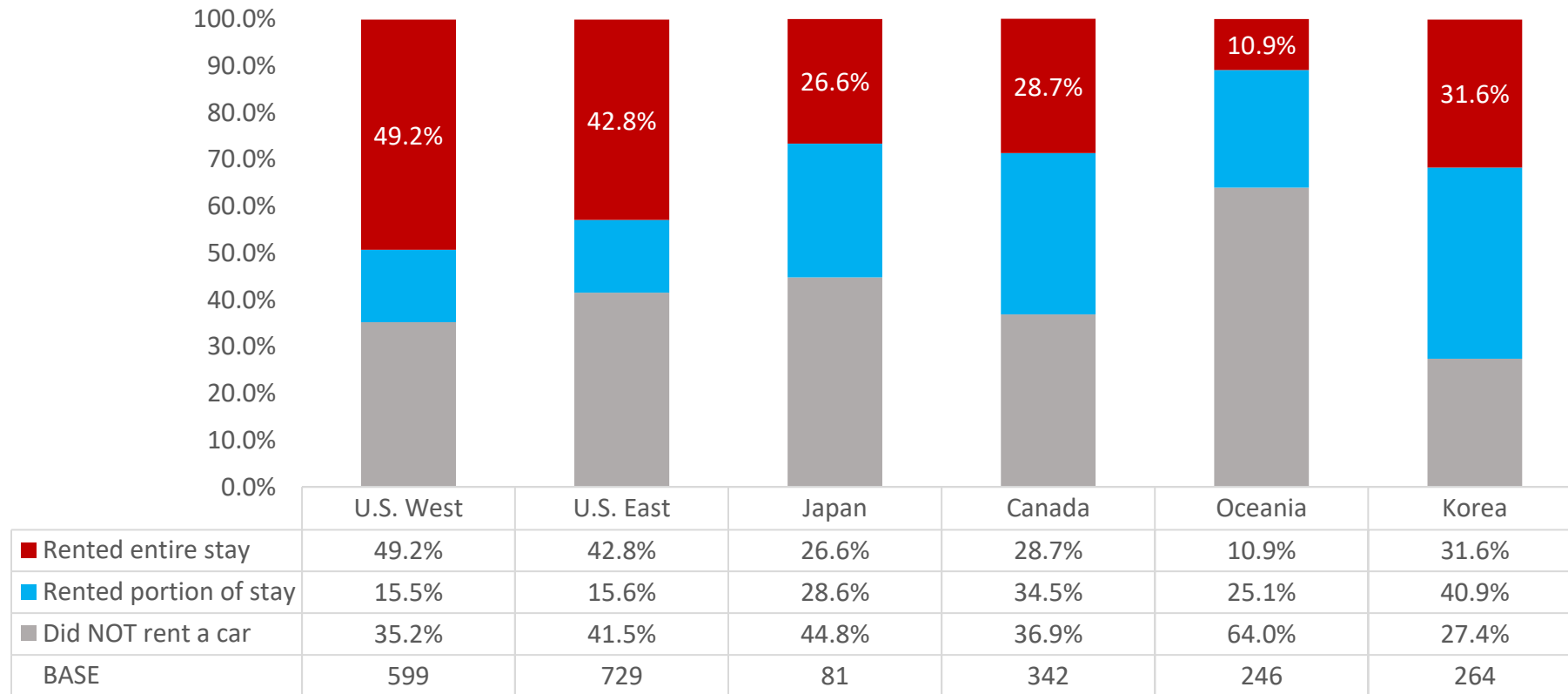
SNORKELING EQUIPMENT USED - O'AHU



SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	98.9%	97.8%	100%	99.1%	97.8%	98.8%
Yes, needed assistance – using 2-piece mask & snorkel	1.1%	2.2%	-	0.9%	2.2%	1.2%
Yes, while snorkeling using a full-face snorkel mask	-	-	-	-	-	-
BASE	184	177	5	121	52	146

CAR RENTAL - O'AHU



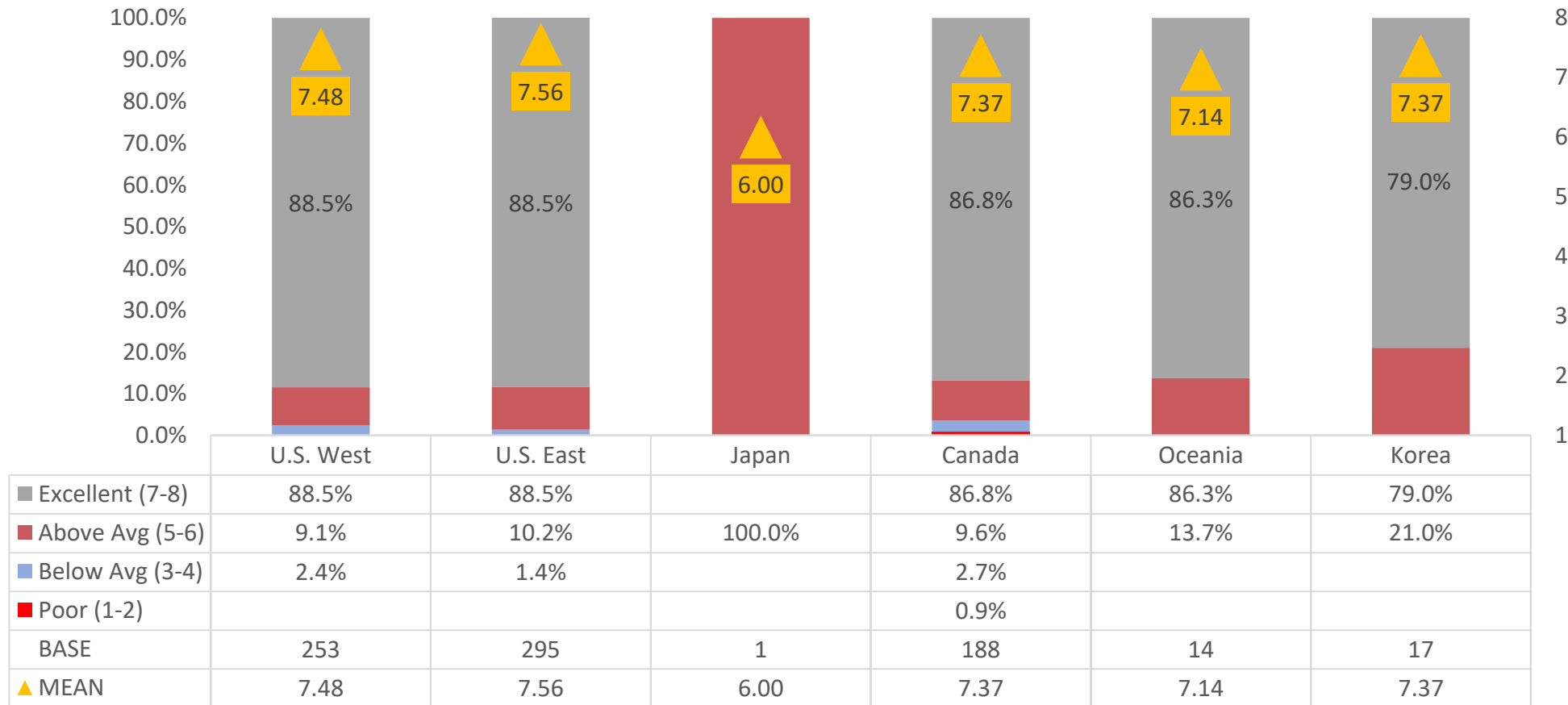
REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Parking was too expensive at my hotel/ lodging	44.1%	37.7%	17.4%	50.7%	28.9%	35.1%
Car rental rates were too expensive	14.0%	23.7%	17.4%	35.1%	21.0%	34.4%
I only needed a vehicle on certain dates	78.5%	74.6%	79.0%	80.0%	75.9%	50.7%
Vehicles were not available for all of my trip dates	4.3%	2.6%	0.0%	6.1%	6.7%	10.2%
BASE	93	114	23	117	61	106

Section 6 – KAUA'I

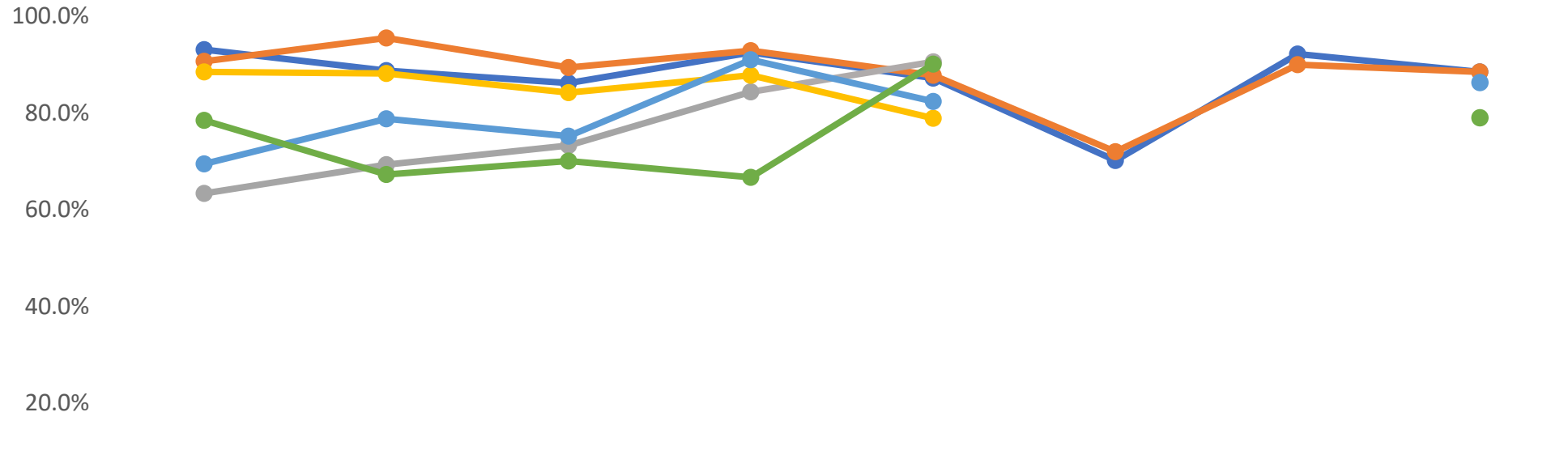
SATISFACTION - KAUUA'I

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



SATISFACTION - KAUA'I

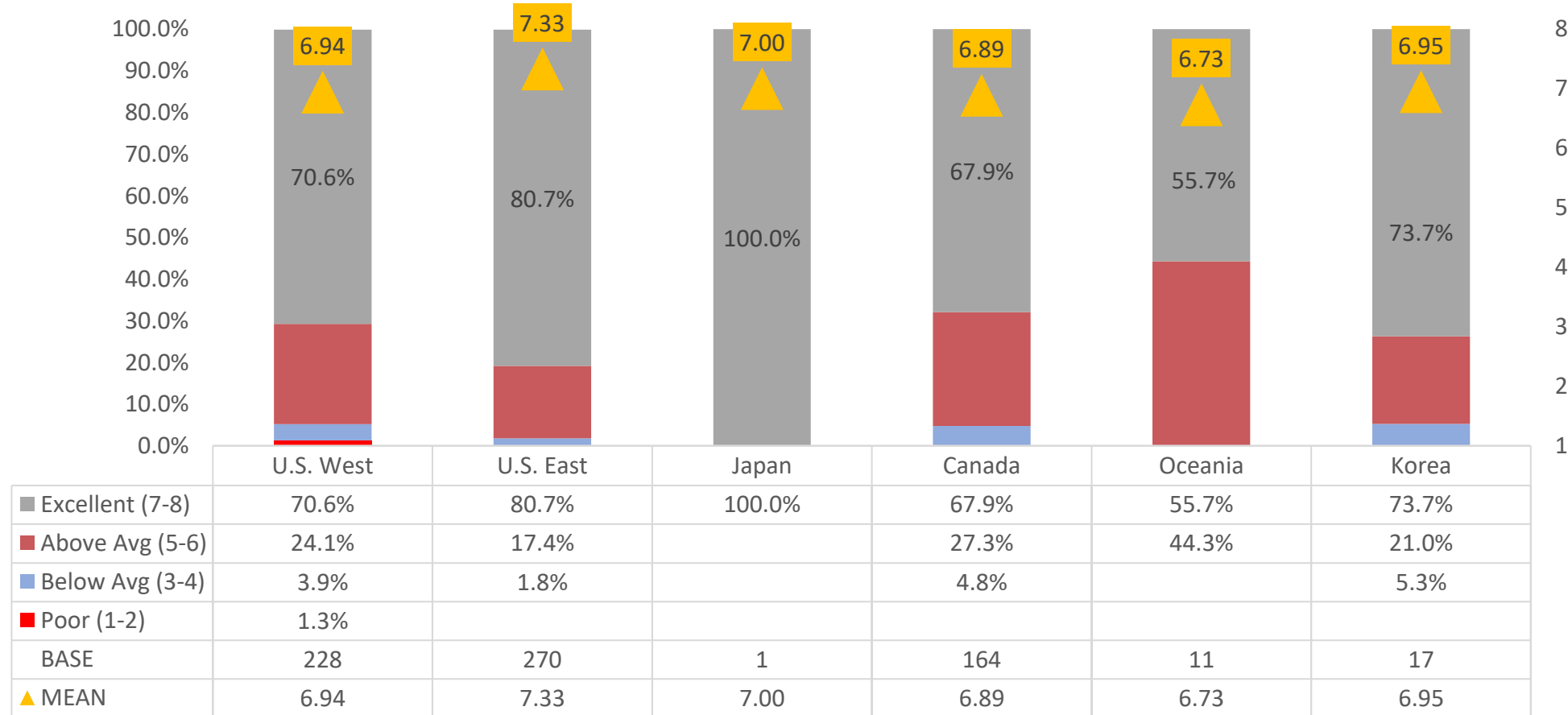
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	93.1%	88.8%	86.2%	92.5%	87.2%	70.2%	92.2%	88.5%
U.S. East	90.7%	95.5%	89.4%	92.9%	87.8%	72.0%	90.0%	88.5%
Japan	63.4%	69.3%	73.3%	84.4%	90.6%			
Canada	88.5%	88.2%	84.2%	87.8%	78.9%		93.4%	86.8%
Oceania	69.5%	78.8%	75.2%	91.0%	82.4%			86.3%
Korea	78.5%	67.3%	70.1%	66.7%	90.1%			79.0%

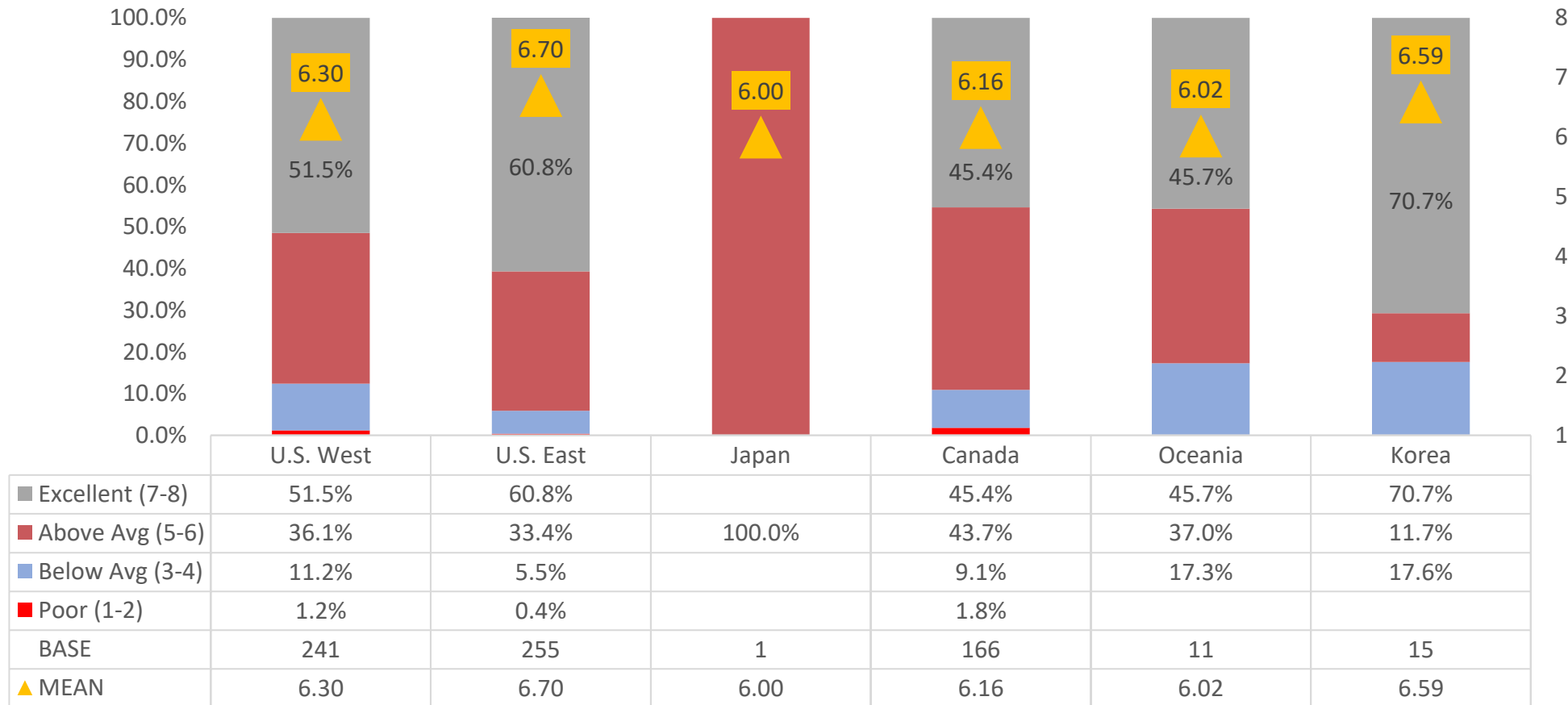
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



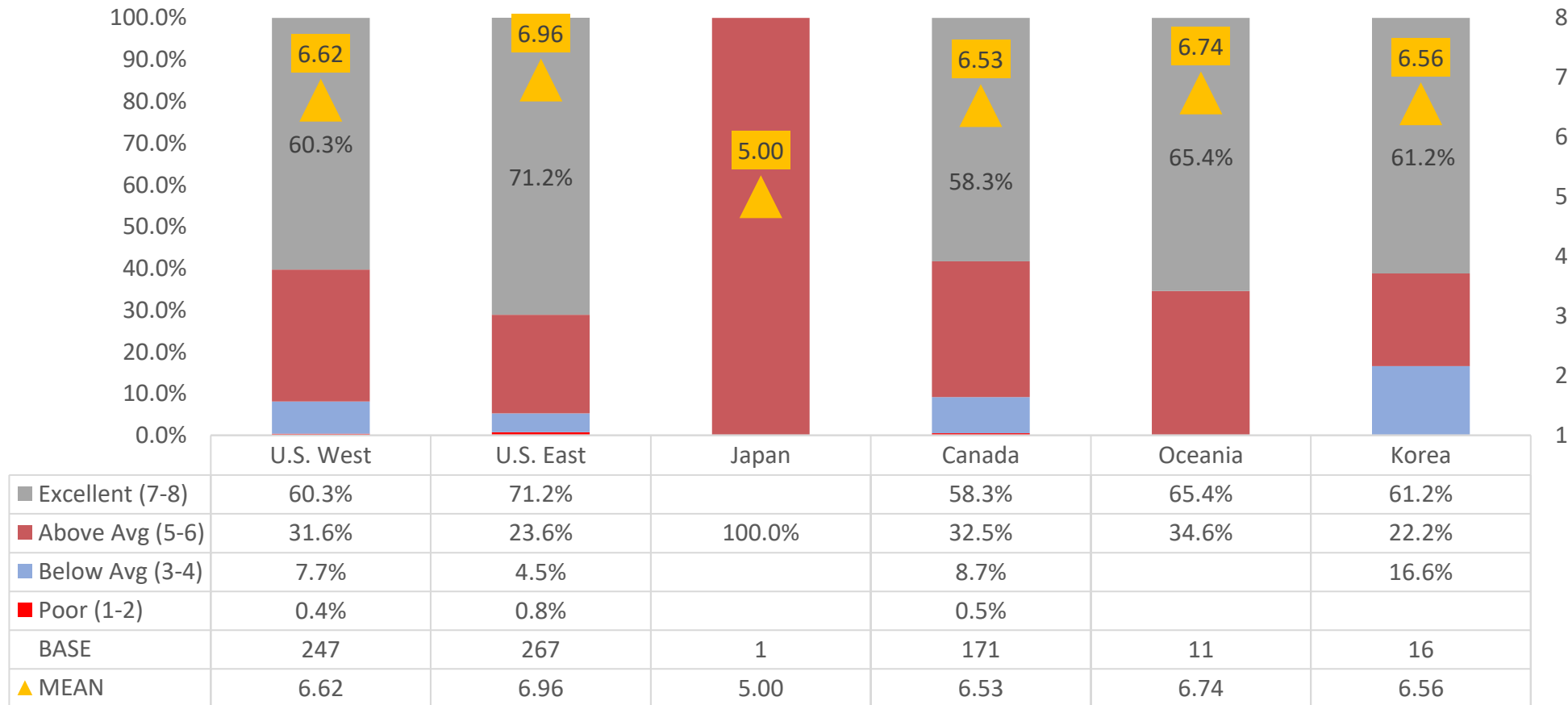
SHOPPING - KAUA'I

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



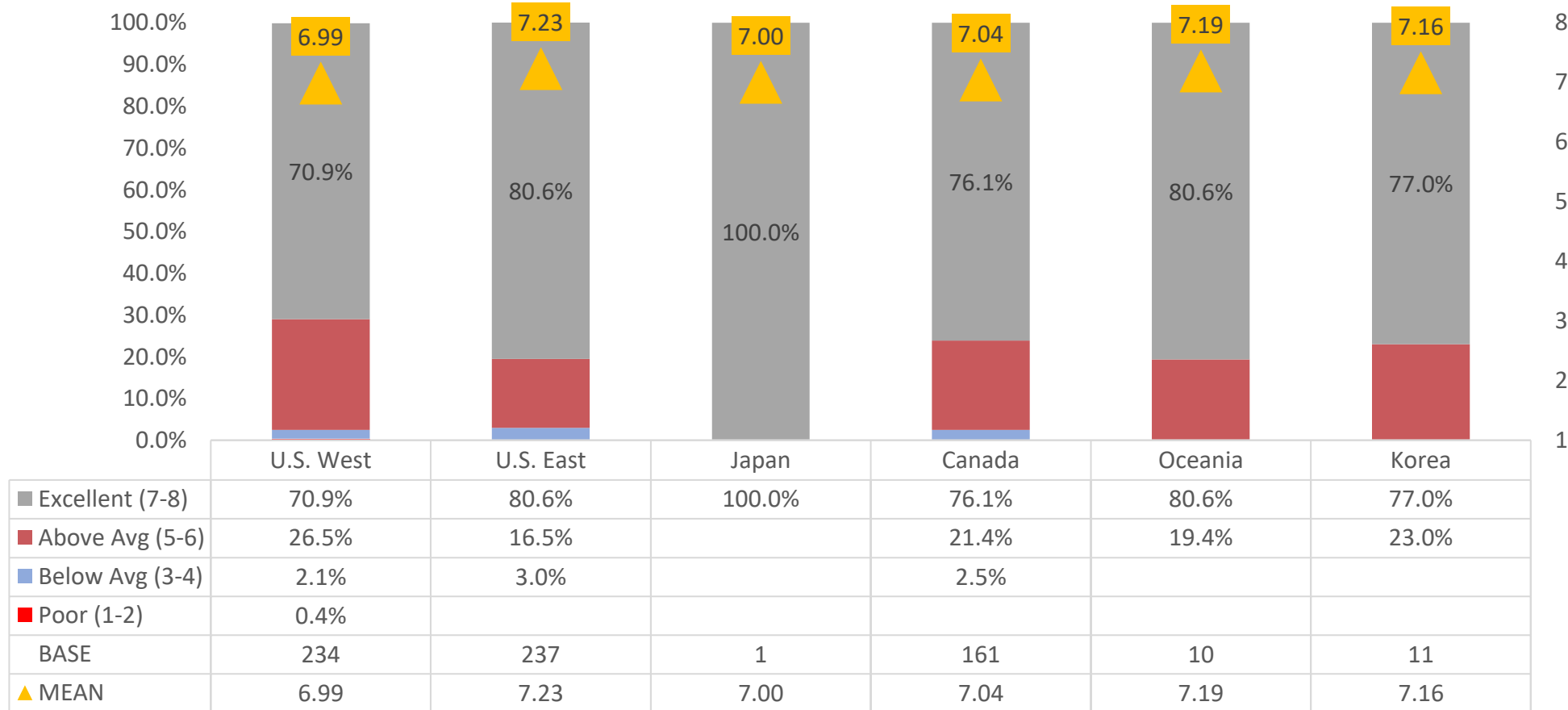
DINING/ FOOD & BEVERAGE - KAUA'I

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



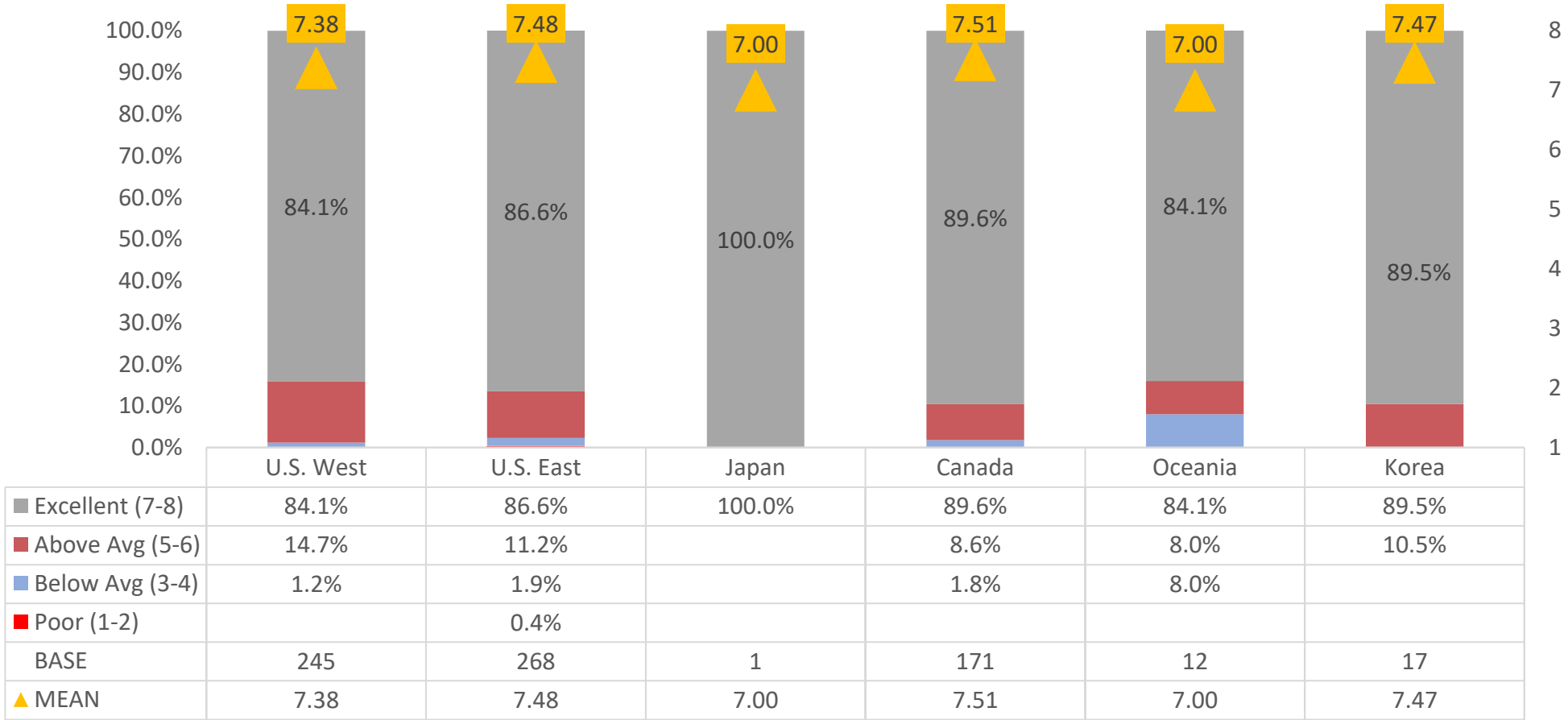
LODGING/ ACCOMMODATIONS - KAUA'I

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



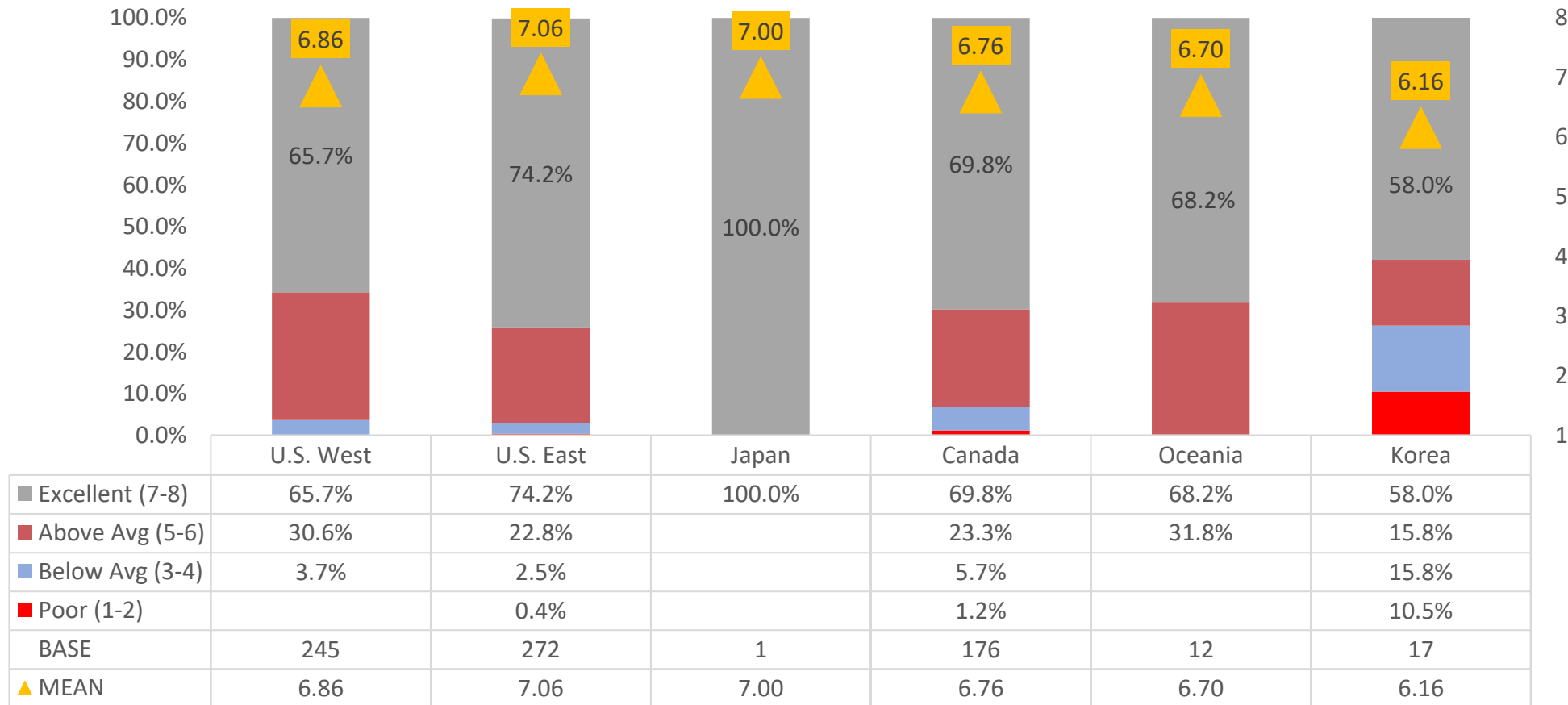
BEACHES - KAUA'I

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



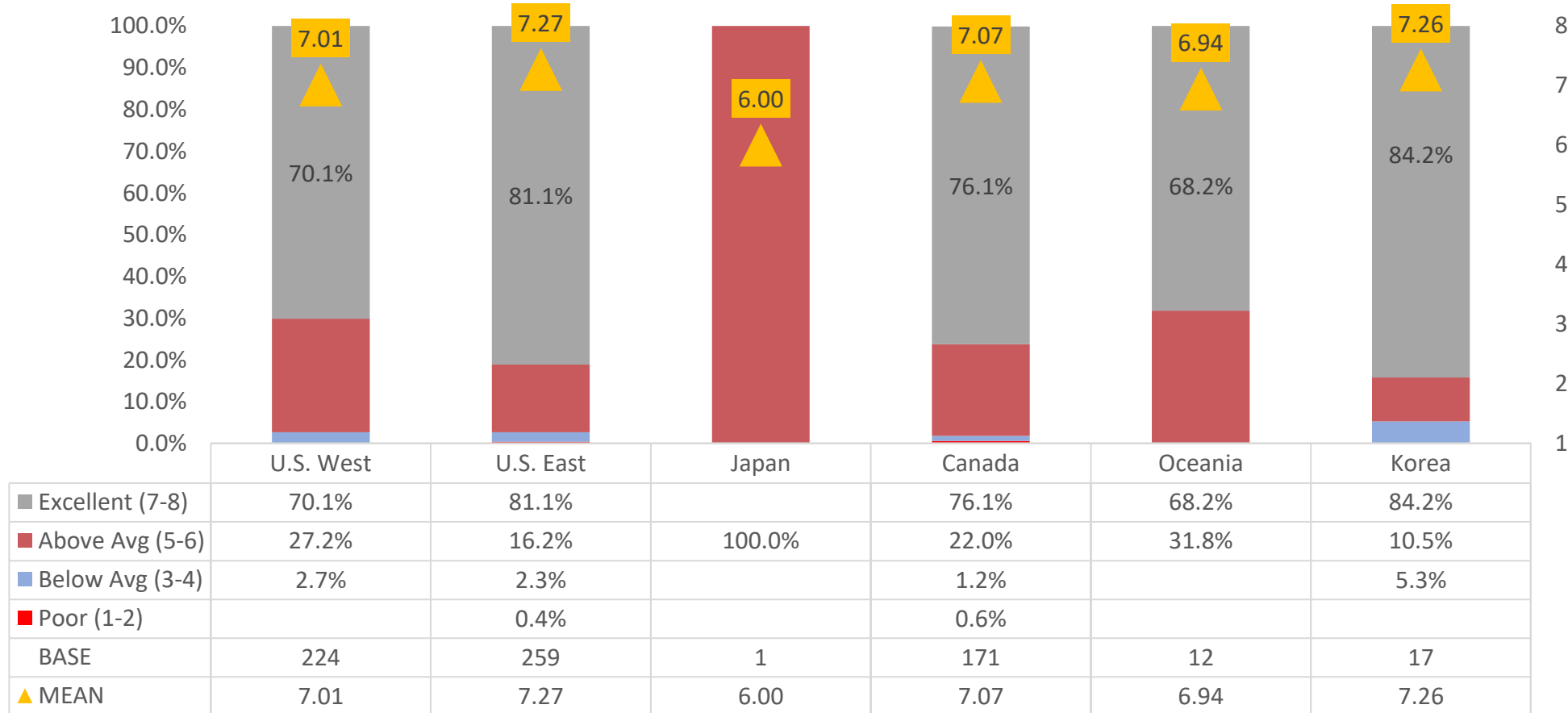
PUBLIC AREAS - KAUA'I

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



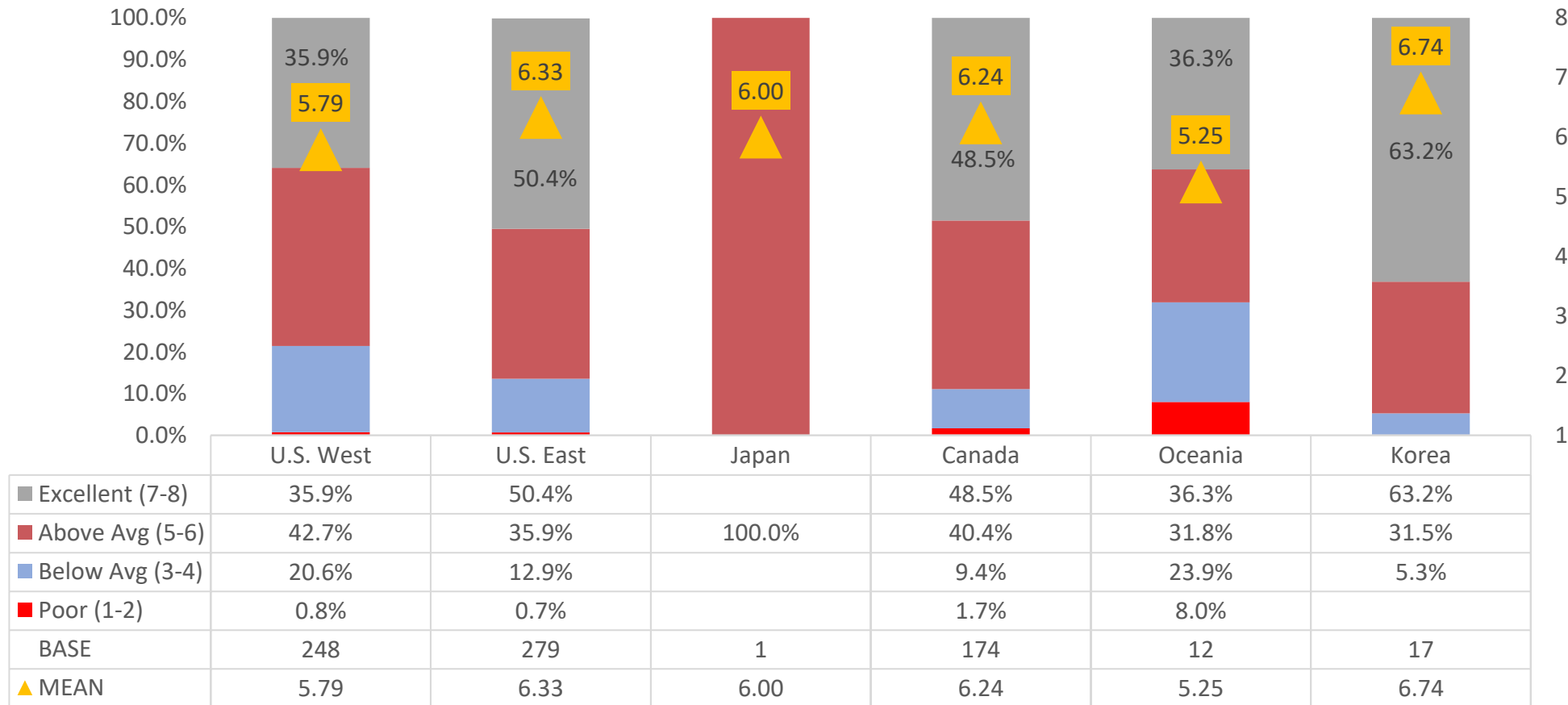
PARKS - KAUA'I

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



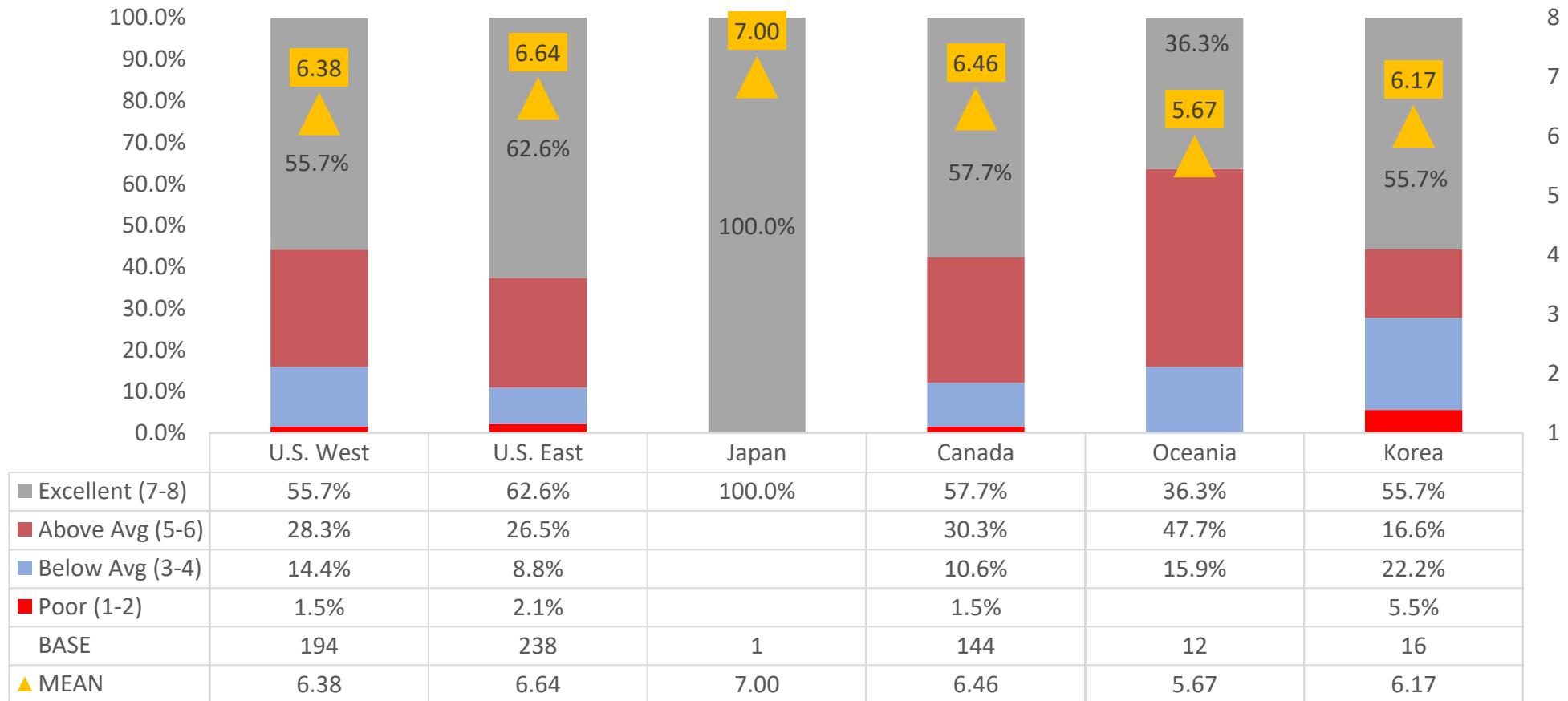
ROADS - KAUA'I

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



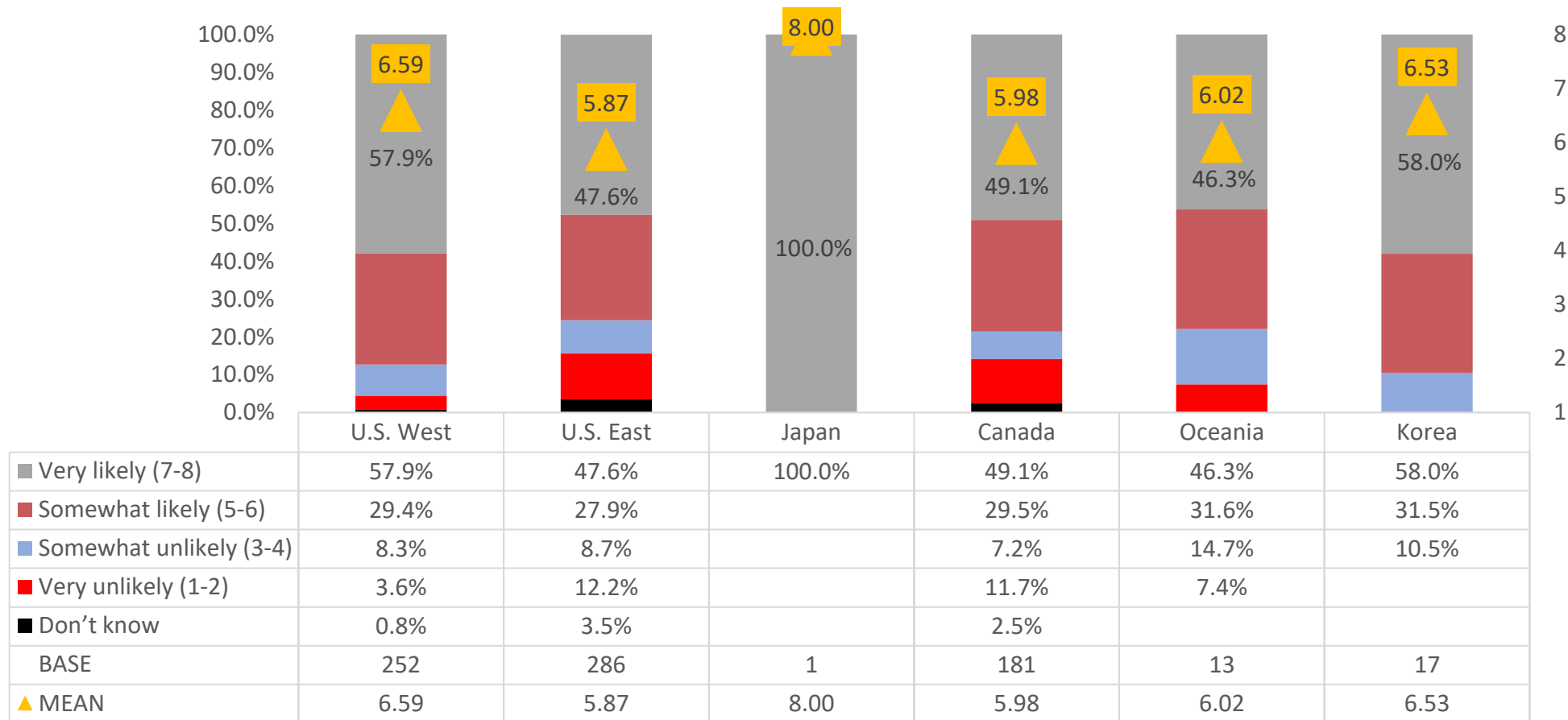
TRANSPORTATION ON ISLAND - KAUA'I

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



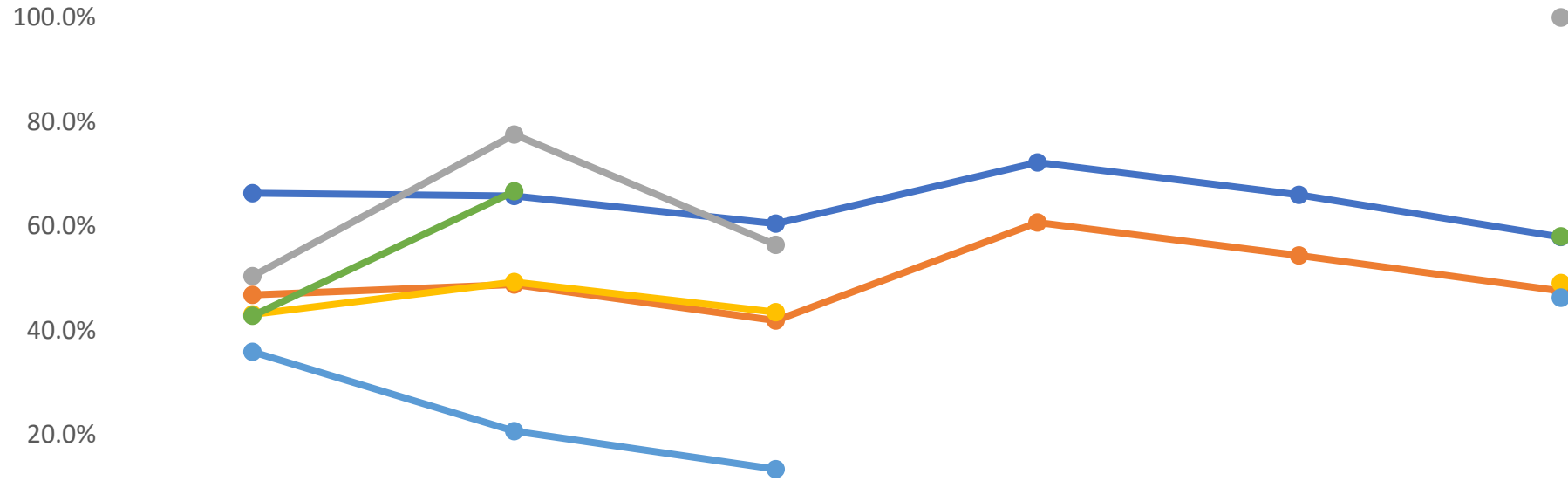
LIKELIHOOD OF RETURN VISIT - KAUA'I

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



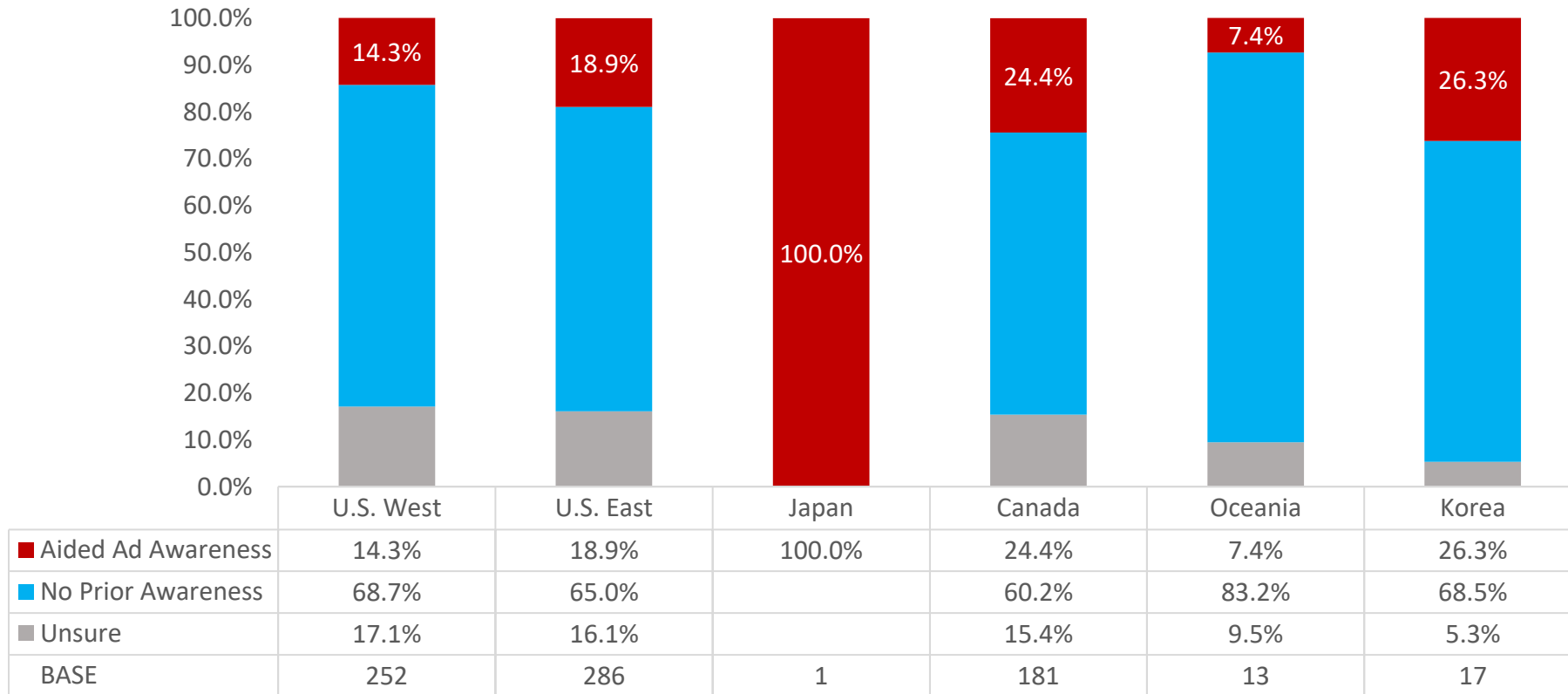
LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	66.3%	65.8%	60.5%	72.2%	66.0%	57.9%
U.S. East	46.8%	48.8%	41.9%	60.7%	54.4%	47.6%
Japan	50.4%	77.6%	56.4%			100.0%
Canada	43.1%	49.3%	43.5%		55.1%	49.1%
Oceania	35.9%	20.7%	13.4%			46.3%
Korea	42.8%	66.7%	50.3%			58.0%

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	42.1%	47.2%	0.0%	37.1%	55.8%	47.4%
Hawaiian cultural events	5.6%	6.3%	0.0%	4.9%	0.0%	0.0%
Outdoor or sporting activities and events	19.4%	18.3%	0.0%	15.5%	22.1%	5.3%
Social media posts and videos	6.0%	6.3%	0.0%	8.1%	7.4%	21.0%
Hawaiian music	4.8%	1.4%	0.0%	4.5%	0.0%	0.0%
Television programs or movies filmed in Hawai'i	5.2%	5.6%	0.0%	3.7%	0.0%	0.0%
BASE	252	286	1	181	13	17

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Fern Grotto	11.1%	11.6%	0.0%	12.3%	24.2%	0.0%
Hanalei Town	53.2%	44.2%	0.0%	59.0%	29.5%	0.0%
Hanalei Beach	40.1%	43.4%	0.0%	53.2%	36.9%	0.0%
Kalapaki Beach	21.0%	22.3%	0.0%	27.8%	31.6%	15.8%
Kalalau Trail	12.7%	15.7%	0.0%	17.6%	22.1%	0.0%
Bike Path in Kapa'a	12.3%	7.7%	0.0%	8.9%	0.0%	0.0%
Kaua'i Museum	6.7%	4.6%	0.0%	5.7%	0.0%	0.0%
Ke'e Beach	7.1%	10.5%	0.0%	14.3%	7.4%	5.3%
Kīlauea Lighthouse	29.4%	26.3%	0.0%	28.2%	7.4%	15.9%
Koke'e	11.5%	9.8%	0.0%	15.4%	0.0%	0.0%

ATTRACTIONS- KAUA'I

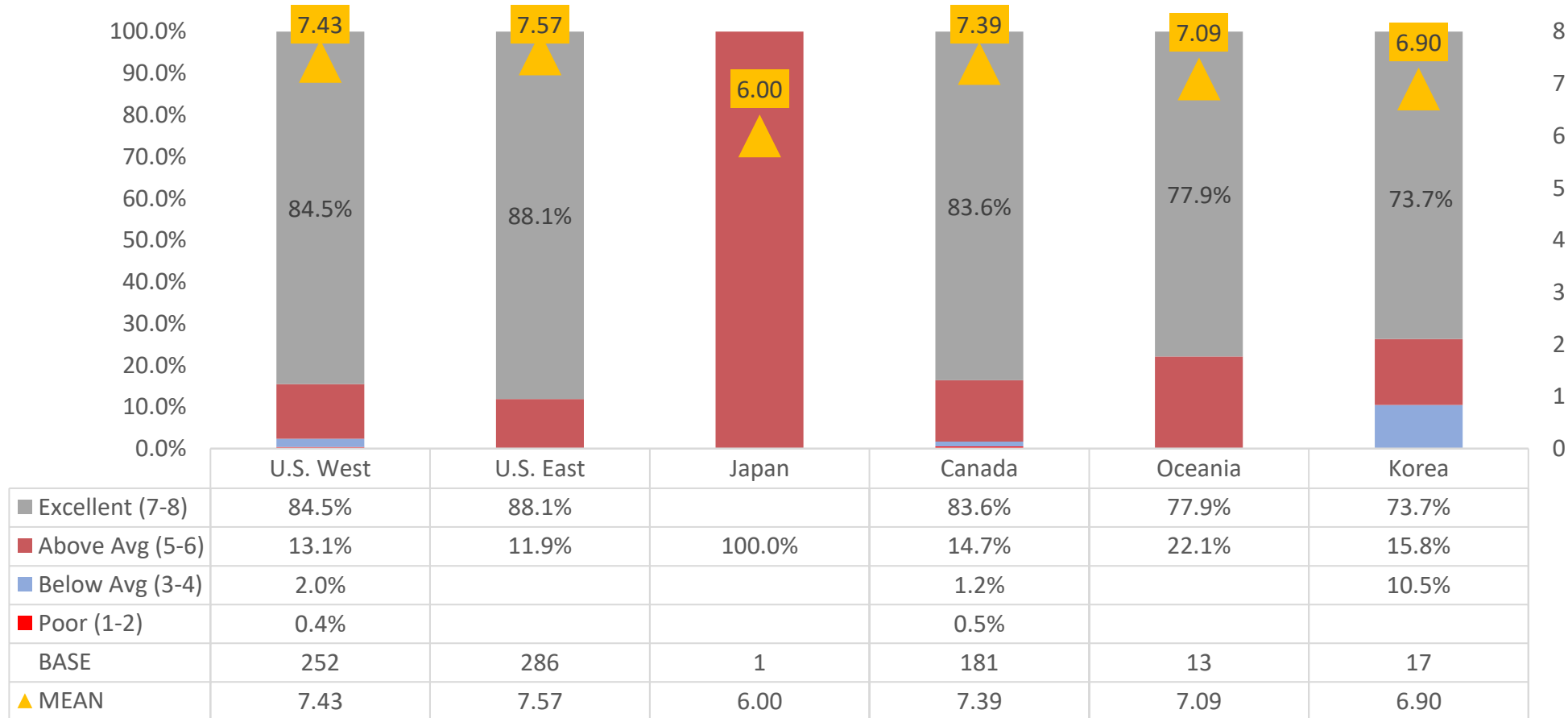
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Koke'e Museum	2.8%	2.8%	0.0%	4.2%	0.0%	0.0%
Na 'Aina Kai Gardens	1.2%	1.8%	0.0%	3.9%	9.5%	0.0%
Napali Coast	34.5%	48.9%	0.0%	36.9%	59.0%	21.1%
Allerton Garden	6.7%	8.8%	0.0%	10.6%	0.0%	0.0%
Limahuli Garden	6.7%	5.9%	0.0%	4.8%	9.5%	0.0%
Old Kōloa Town	41.7%	29.1%	100.0%	42.2%	22.1%	5.3%
Opaeka'a Falls	21.0%	22.1%	0.0%	26.3%	24.2%	15.8%
Po'ipu Beach	64.7%	58.5%	100.0%	72.7%	51.6%	42.1%
Smith's Tropical Paradise Gardens	7.5%	4.2%	0.0%	6.2%	7.4%	0.0%
Spouting Horn	28.2%	37.2%	0.0%	48.7%	9.5%	5.3%
Wailua Falls	35.3%	39.6%	0.0%	41.8%	29.5%	26.4%

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Wailua River	24.6%	21.7%	0.0%	17.3%	22.1%	0.0%
Waimea Canyon	48.8%	55.0%	0.0%	62.0%	68.4%	63.2%
Disc Golf	0.8%	0.7%	0.0%	1.2%	0.0%	0.0%
Mini Golf	1.6%	1.4%	0.0%	2.8%	0.0%	5.3%

FRIENDLINESS OF KAUA'I RESIDENTS

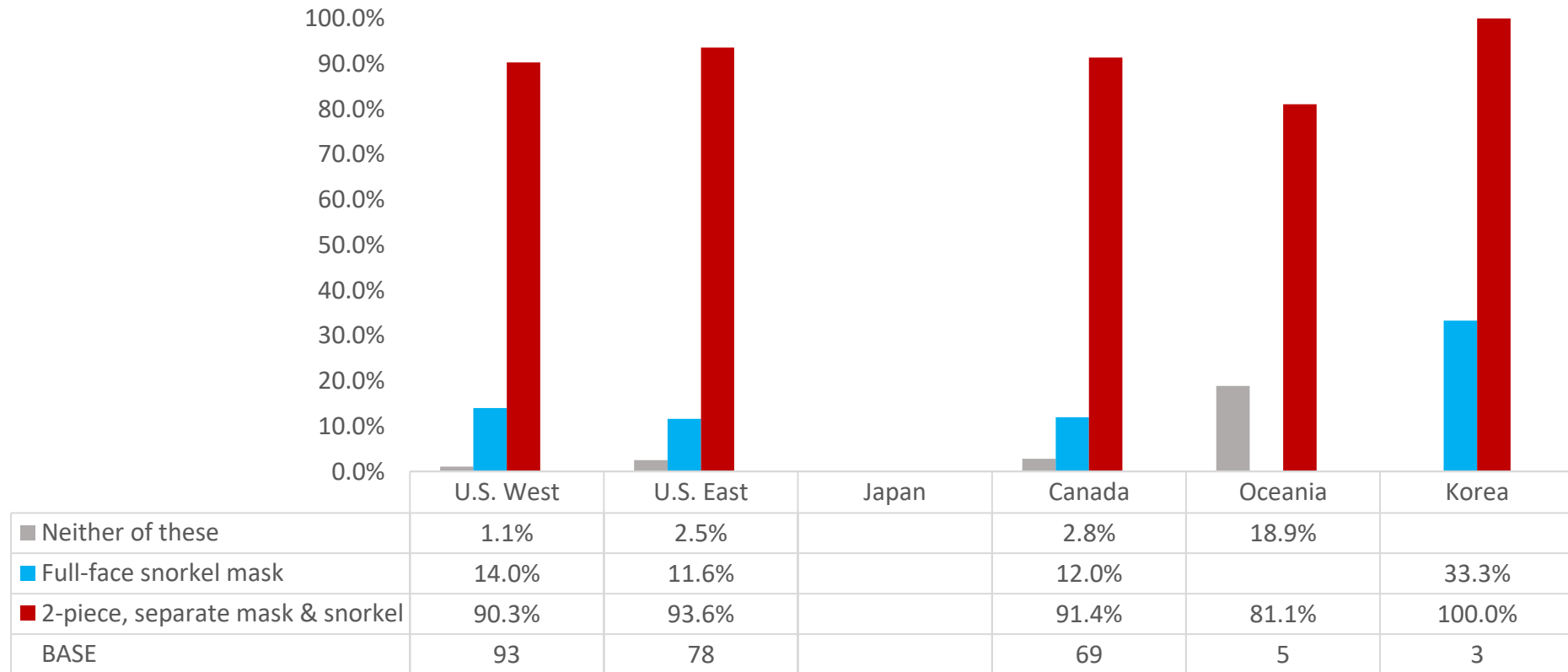
8-pt Rating Scale
8=Excellent/ 1=Poor



TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Been here before	45.2%	30.0%	100.0%	34.2%	29.5%	0.0%
Friend recommendation	25.4%	27.5%	0.0%	30.2%	29.5%	36.9%
Cruise line stop/part of tour	4.8%	15.7%	0.0%	8.4%	33.7%	0.0%
Visiting Family/ Friends	4.8%	4.9%	0.0%	2.7%	0.0%	0.0%
Location/ Never been, but went to other islands	3.6%	2.8%	0.0%	2.3%	0.0%	0.0%
Other (please specify)	4.0%	1.7%	0.0%	0.6%	0.0%	0.0%
Article/ Blog	2.0%	2.8%	0.0%	1.5%	0.0%	21.0%
Attending Conference/ Event	2.0%	1.7%	0.0%	4.2%	7.4%	0.0%
Own a timeshare	2.8%	0.4%	0.0%	2.3%	0.0%	0.0%
Social Media Post	0.8%	2.1%	0.0%	4.2%	0.0%	10.5%
Nature/ Beauty/ Scenery	0.8%	3.1%	0.0%	0.6%	0.0%	0.0%
Travel Agent	0.0%	3.5%	0.0%	1.6%	0.0%	31.6%

SNORKELING EQUIPMENT USED - KAUA'I



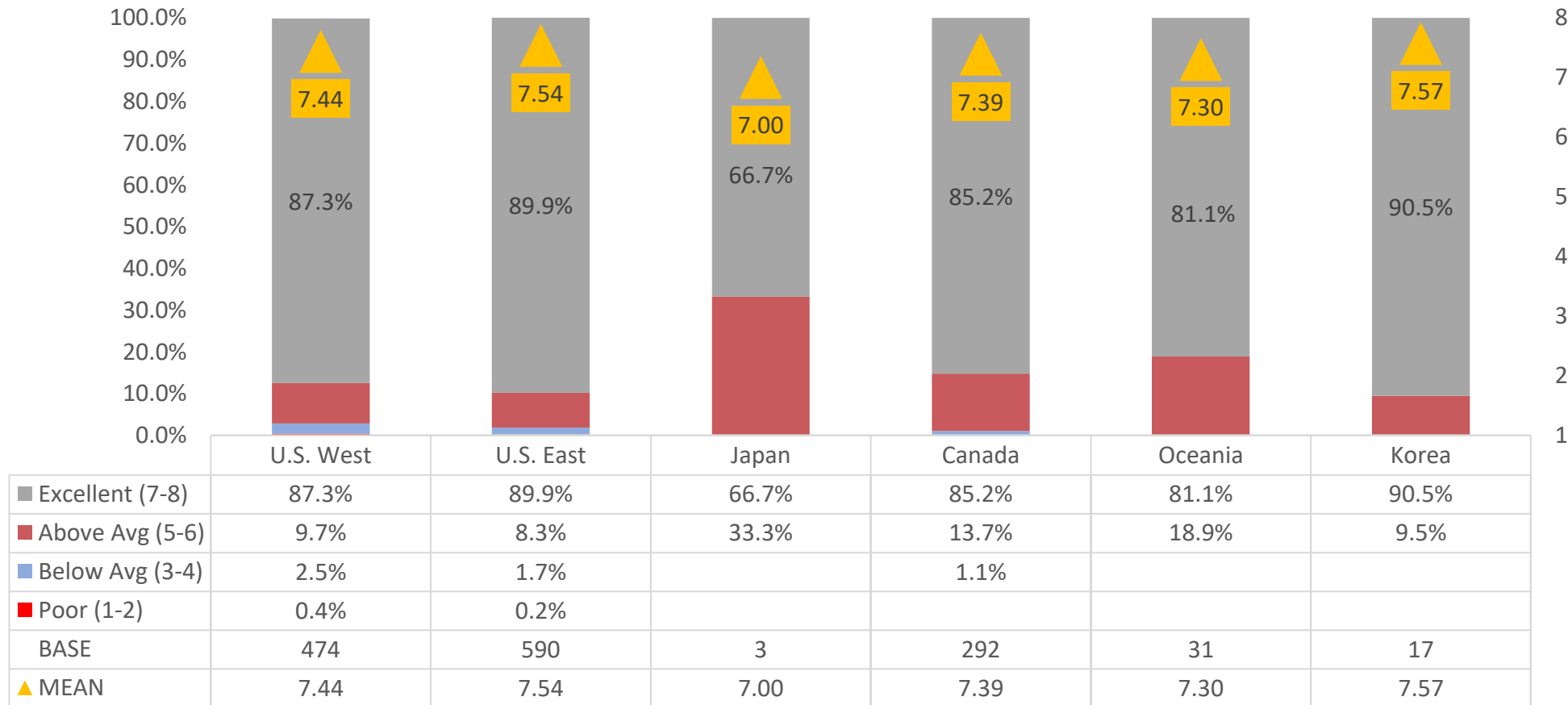
SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	100.0%	100.0%	-	98.4%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	-	-	-	1.6%	-	-
Yes, while snorkeling using a full-face snorkel mask	-	-	-	-	-	-
BASE	92	76	0	67	4	3

Section 7 – MAUI

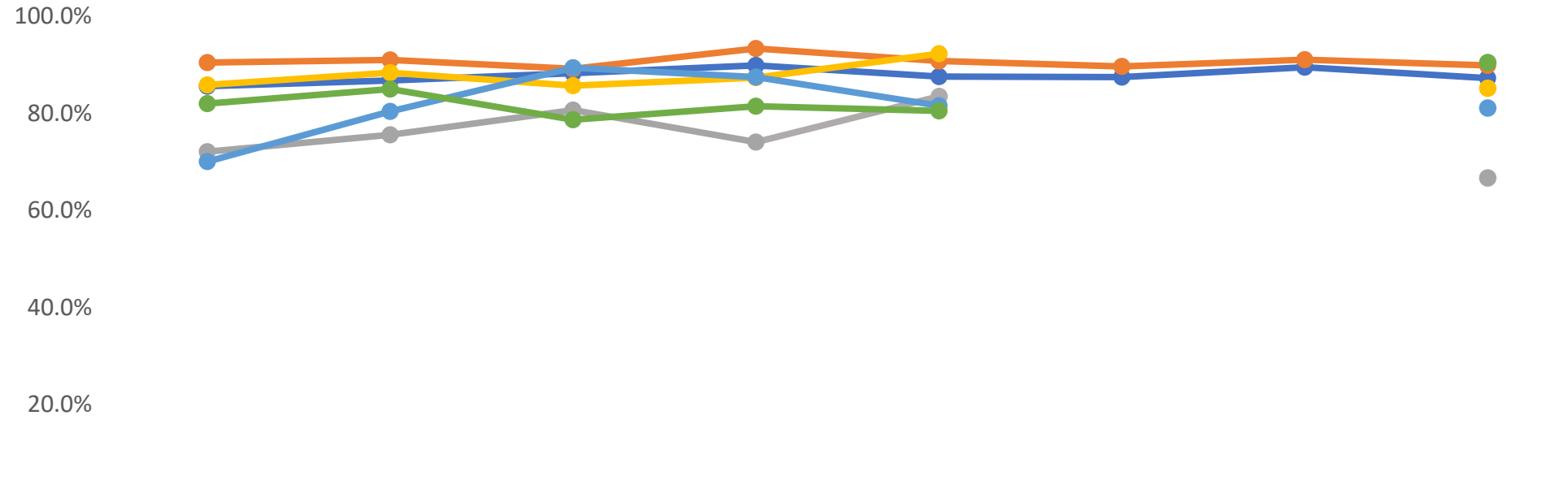
SATISFACTION - MAUI

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



SATISFACTION - MAUI

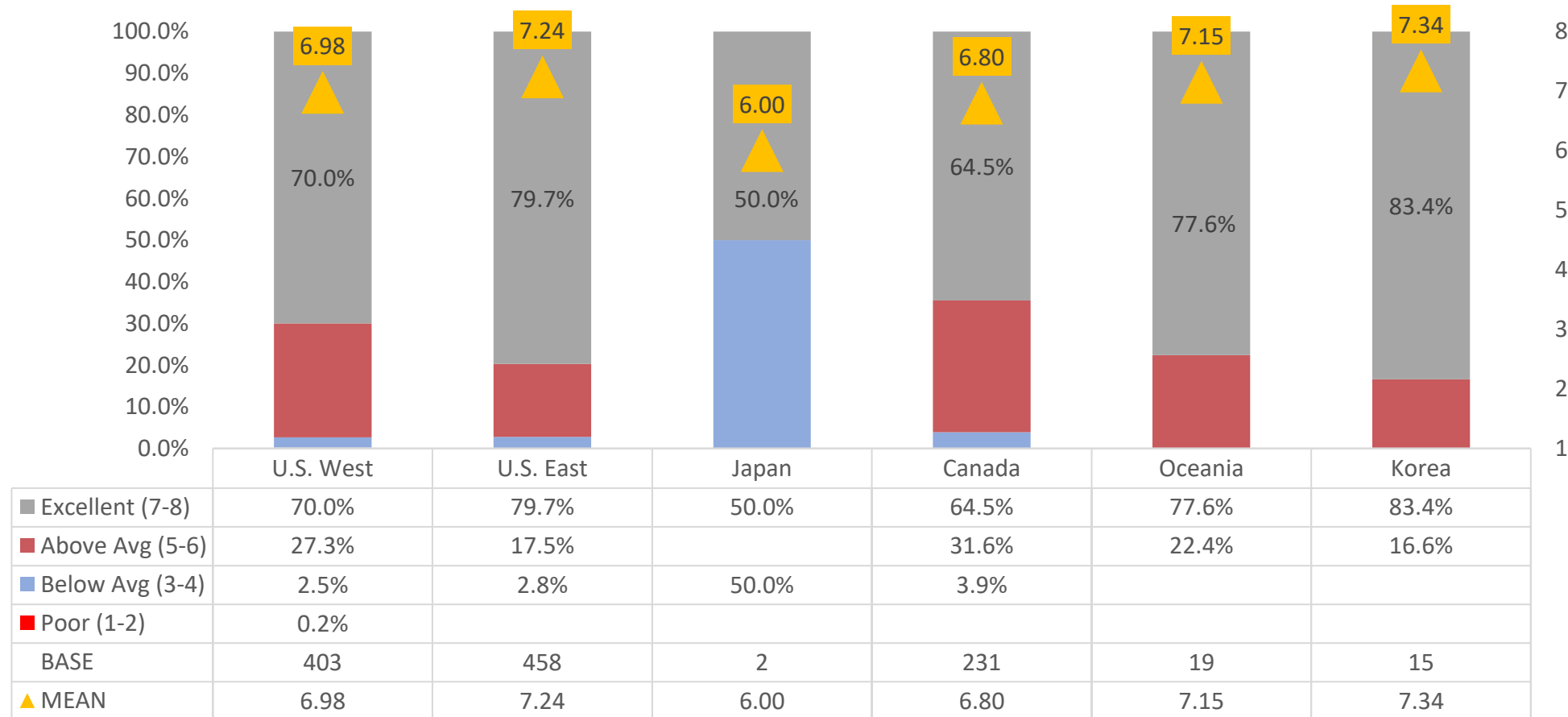
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	85.6%	86.8%	88.3%	89.9%	87.6%	87.5%	89.5%	87.3%
U.S. East	90.5%	91.0%	89.2%	93.4%	90.8%	89.7%	91.1%	89.9%
Japan	72.1%	75.6%	80.7%	74.1%	83.5%			66.7%
Canada	85.9%	88.4%	85.7%	87.4%	92.3%		89.2%	85.2%
Oceania	70.1%	80.4%	89.4%	87.5%	81.6%			81.1%
Korea	82.0%	85.0%	78.7%	81.5%	80.5%			90.5%

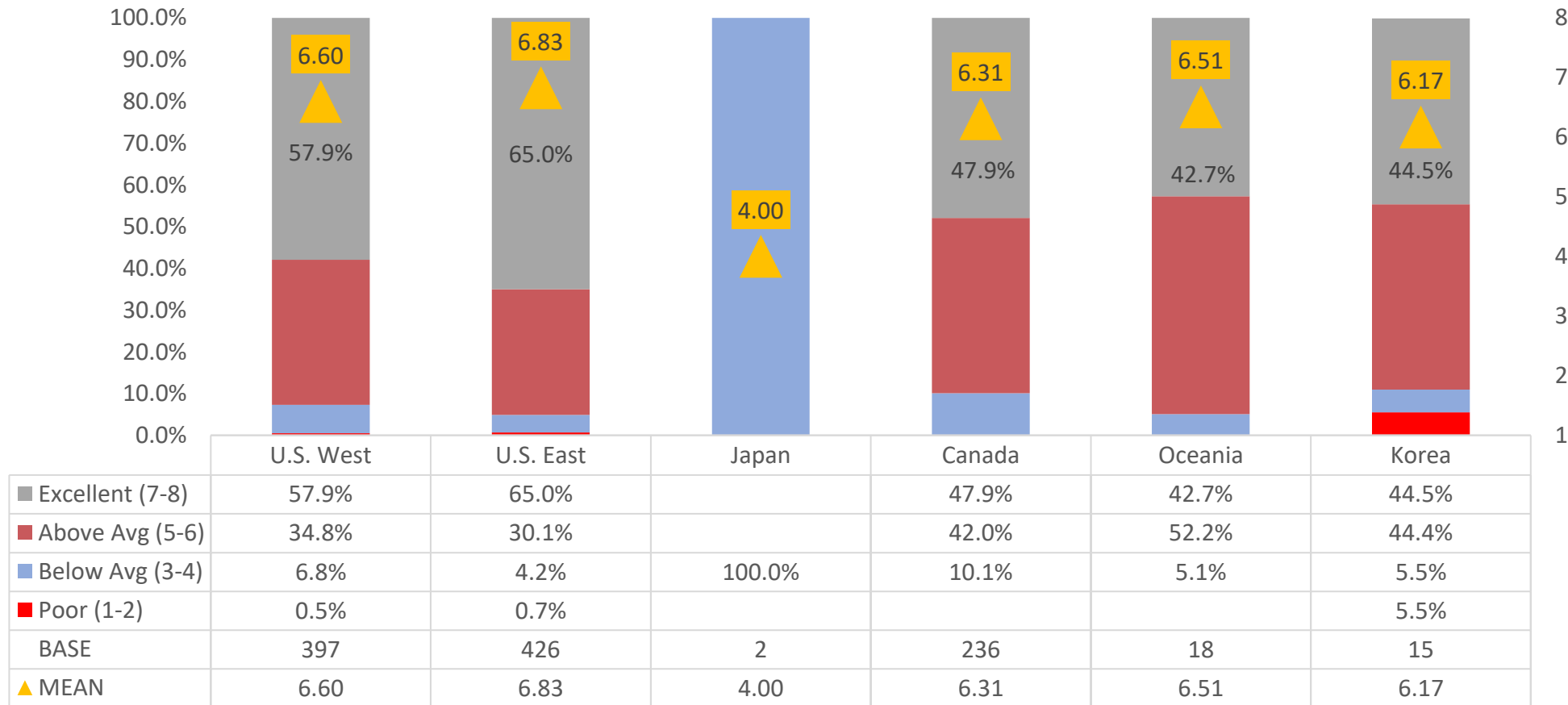
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



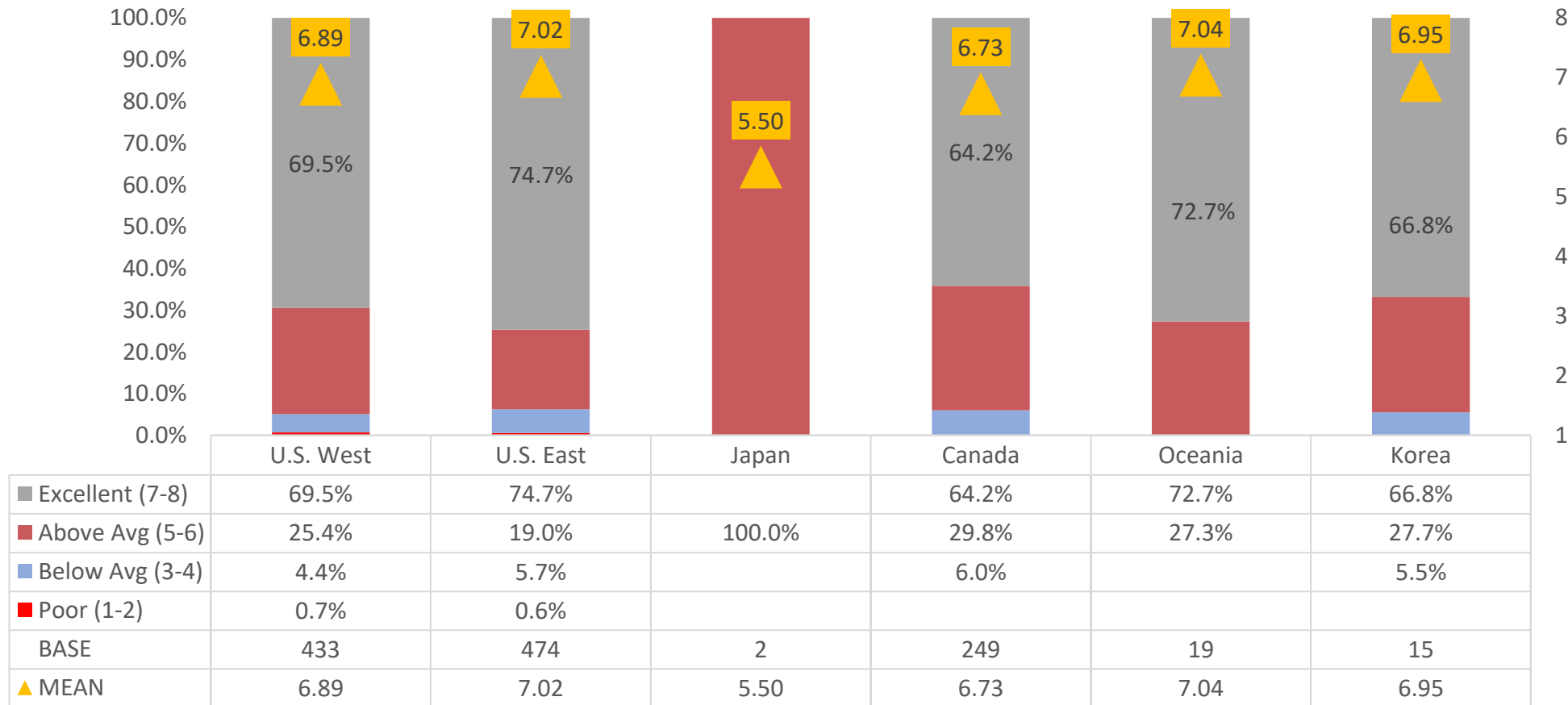
SHOPPING - MAUI

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



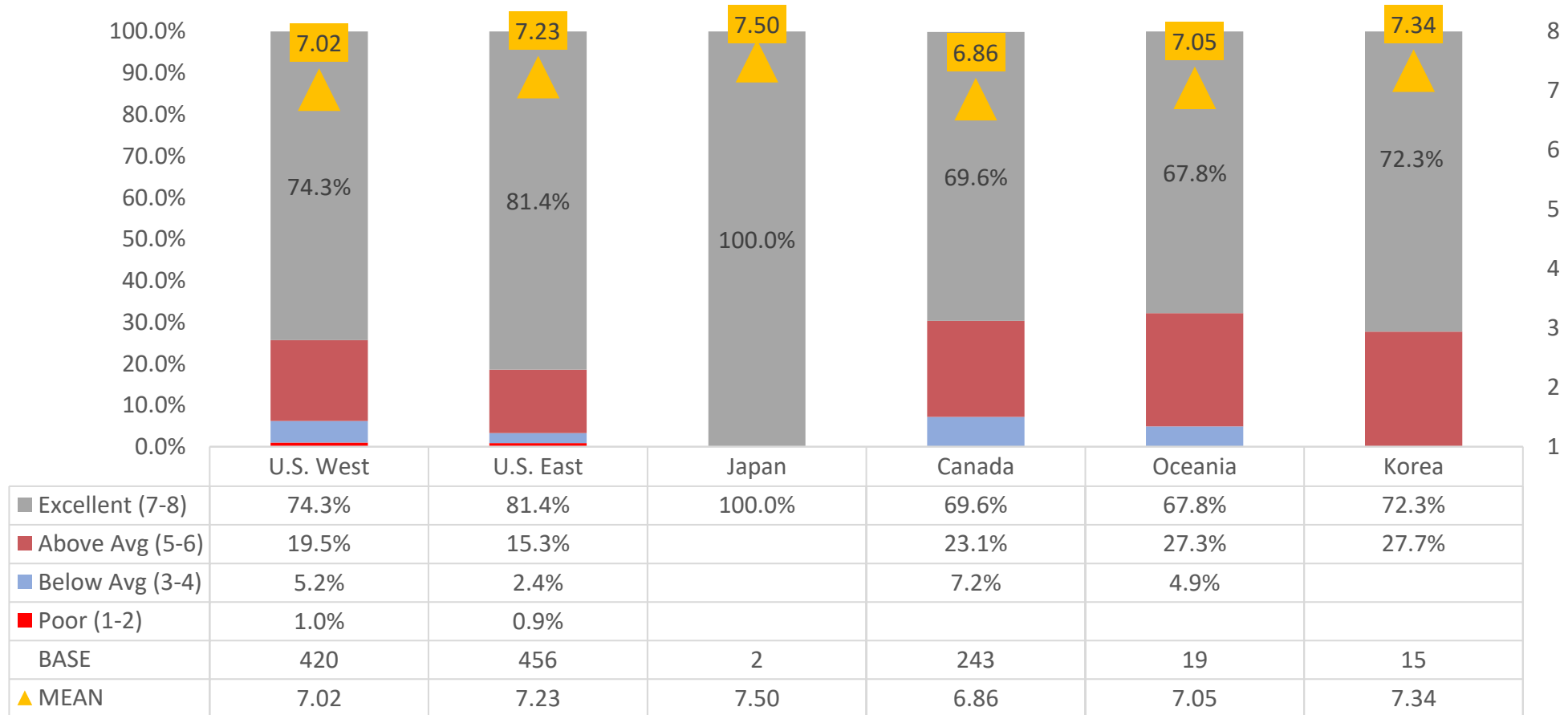
DINING/ FOOD & BEVERAGE - MAUI

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



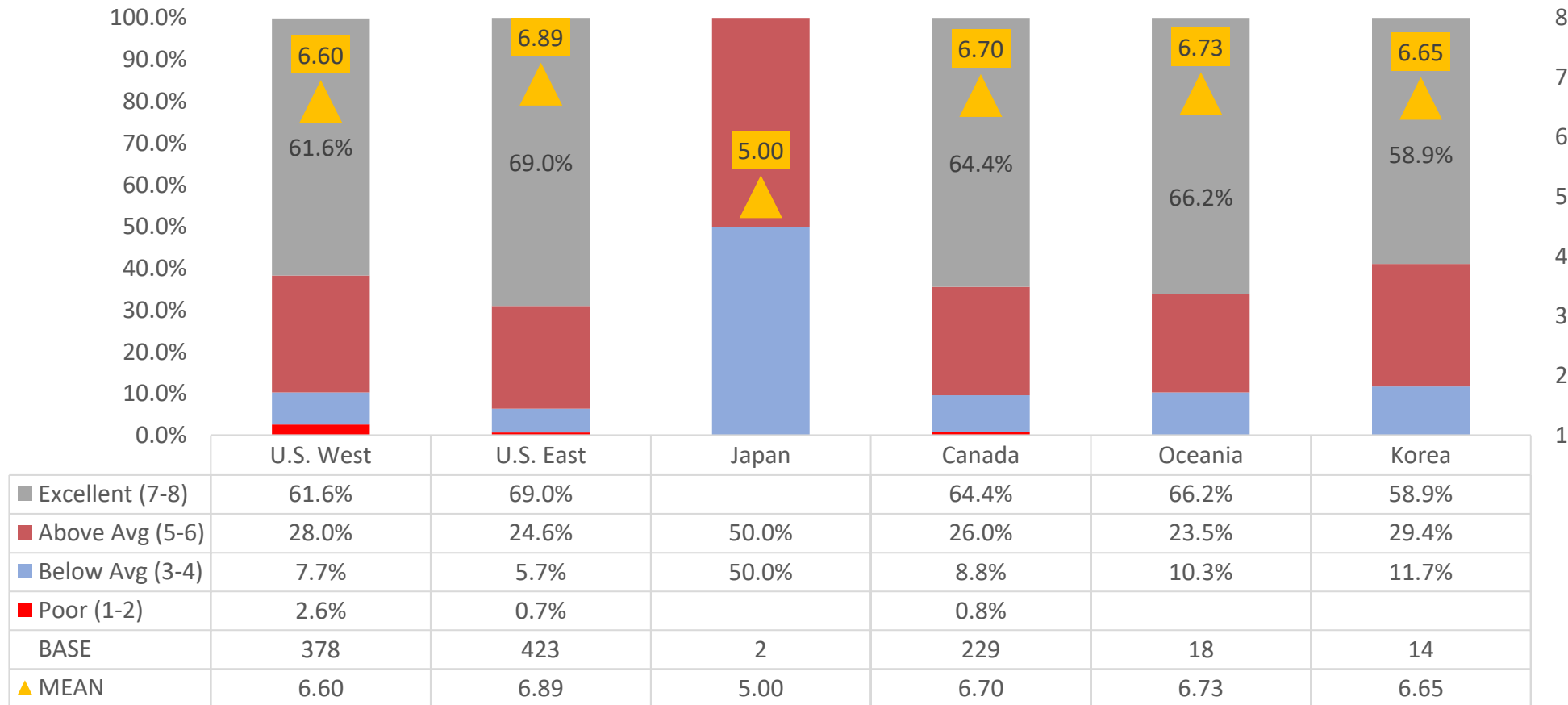
LODGING/ ACCOMMODATIONS - MAUI

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



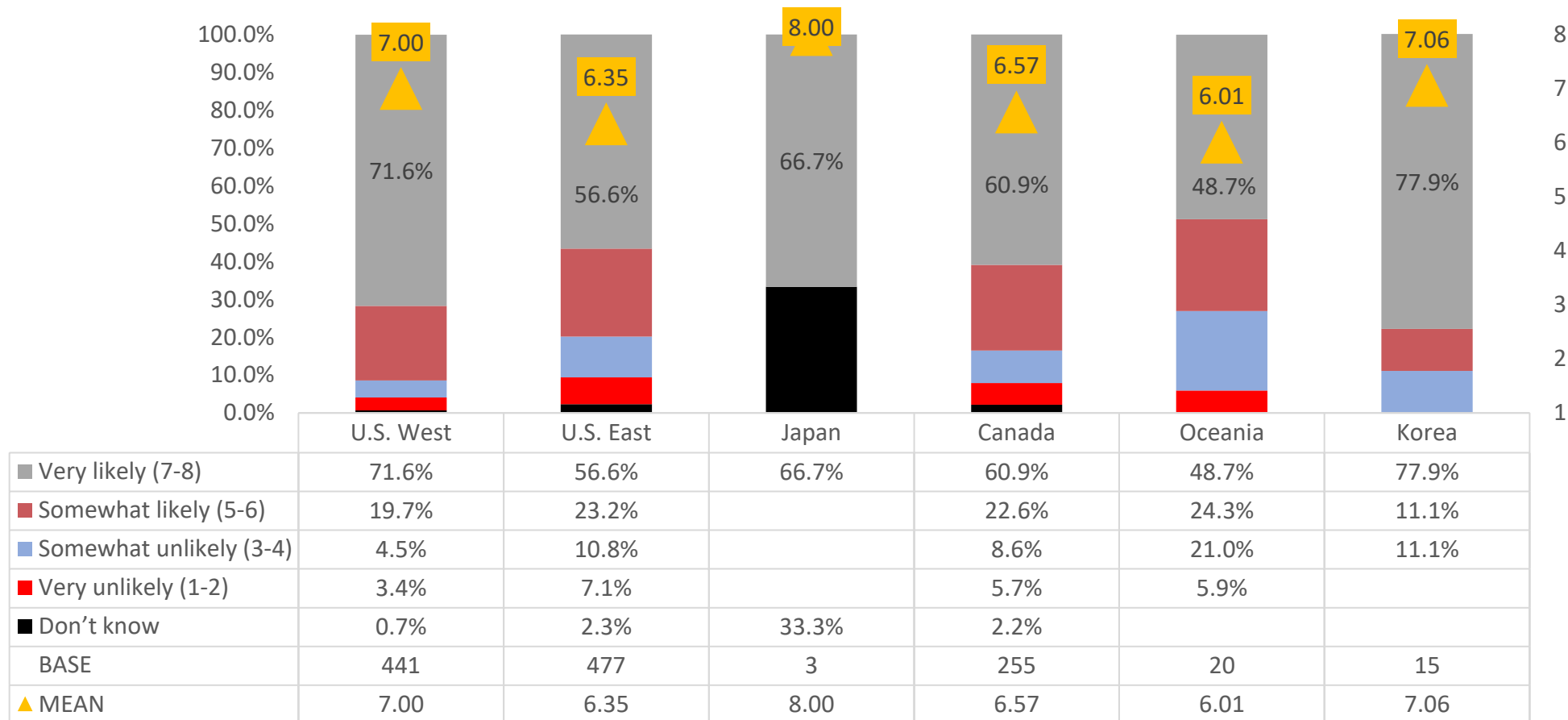
TRANSPORTATION ON ISLAND - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

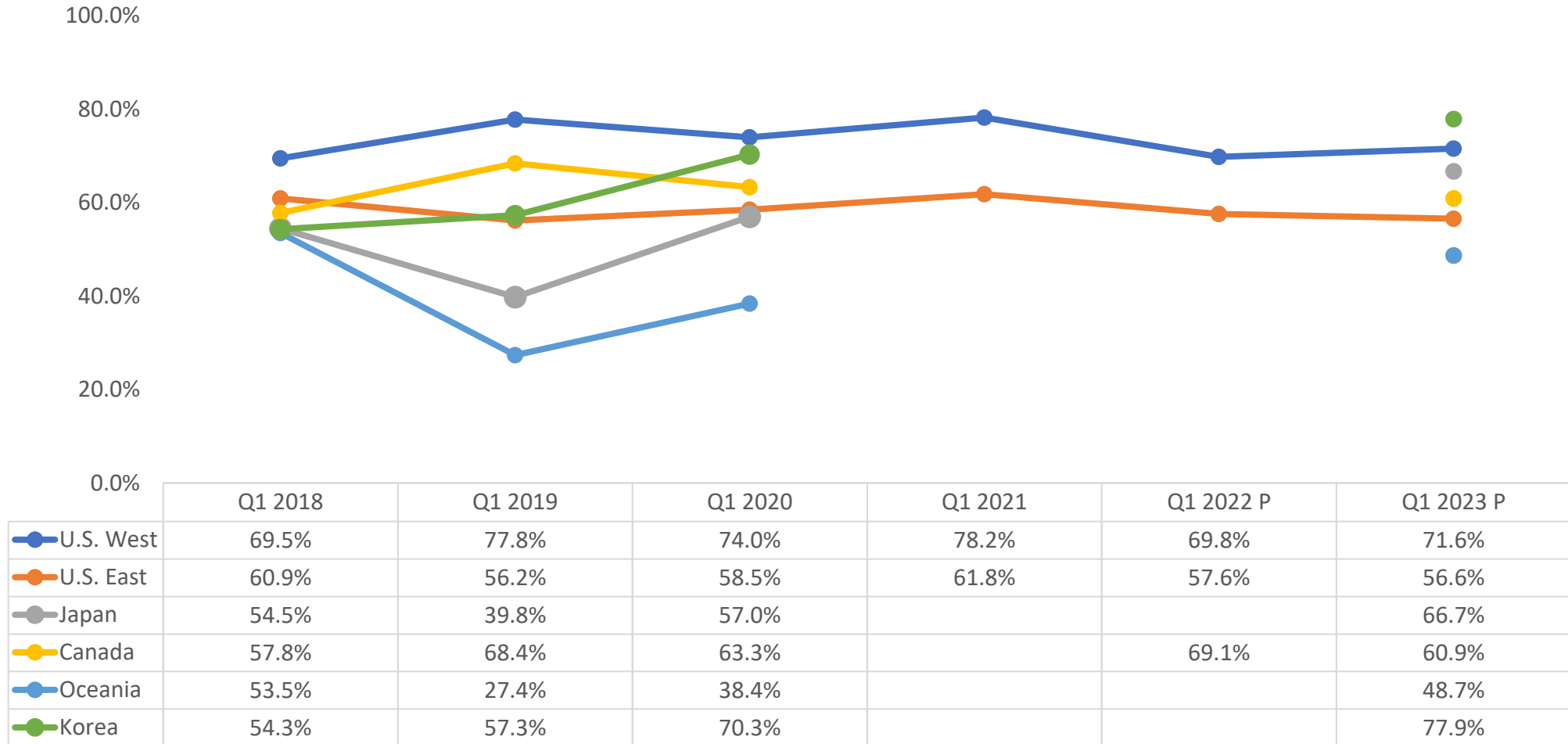
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



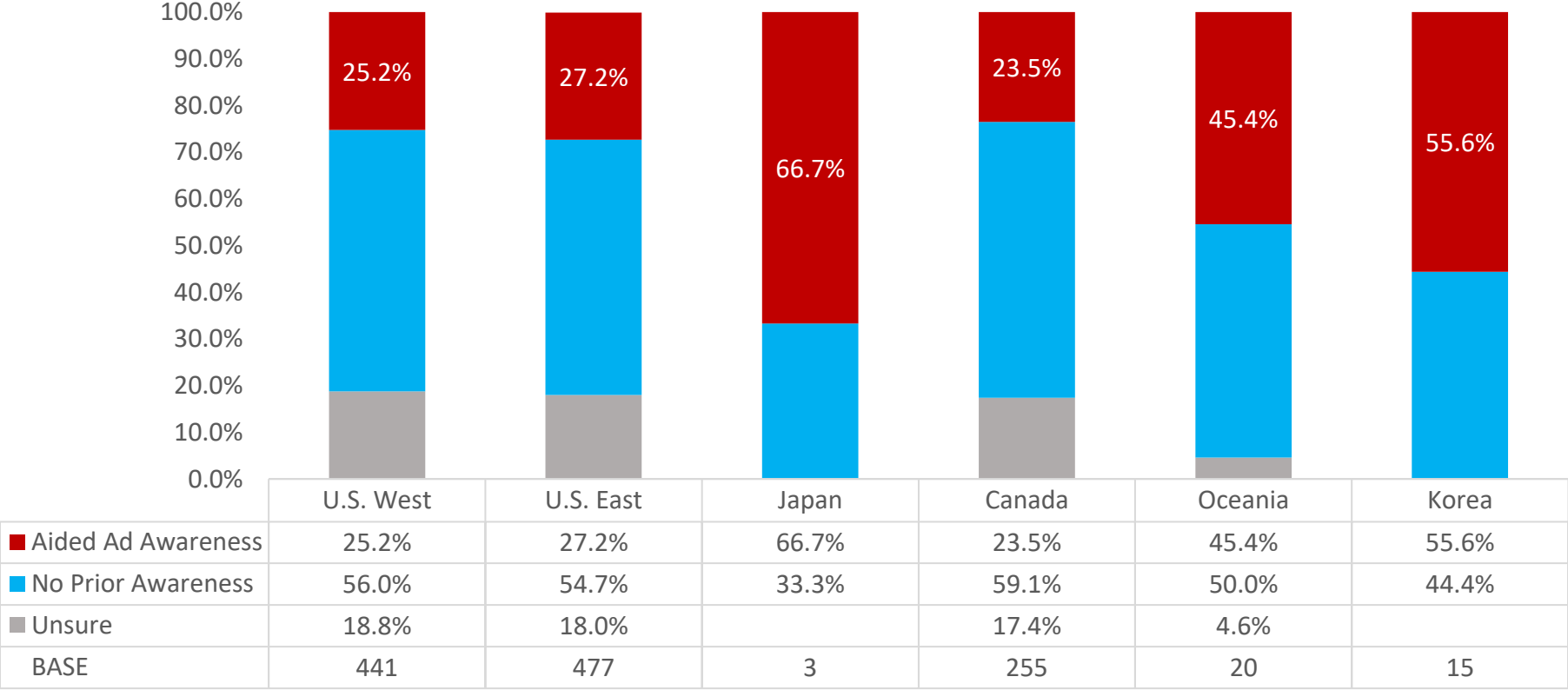
LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

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



AIDED ADVERTISING AWARENESS - MAUI



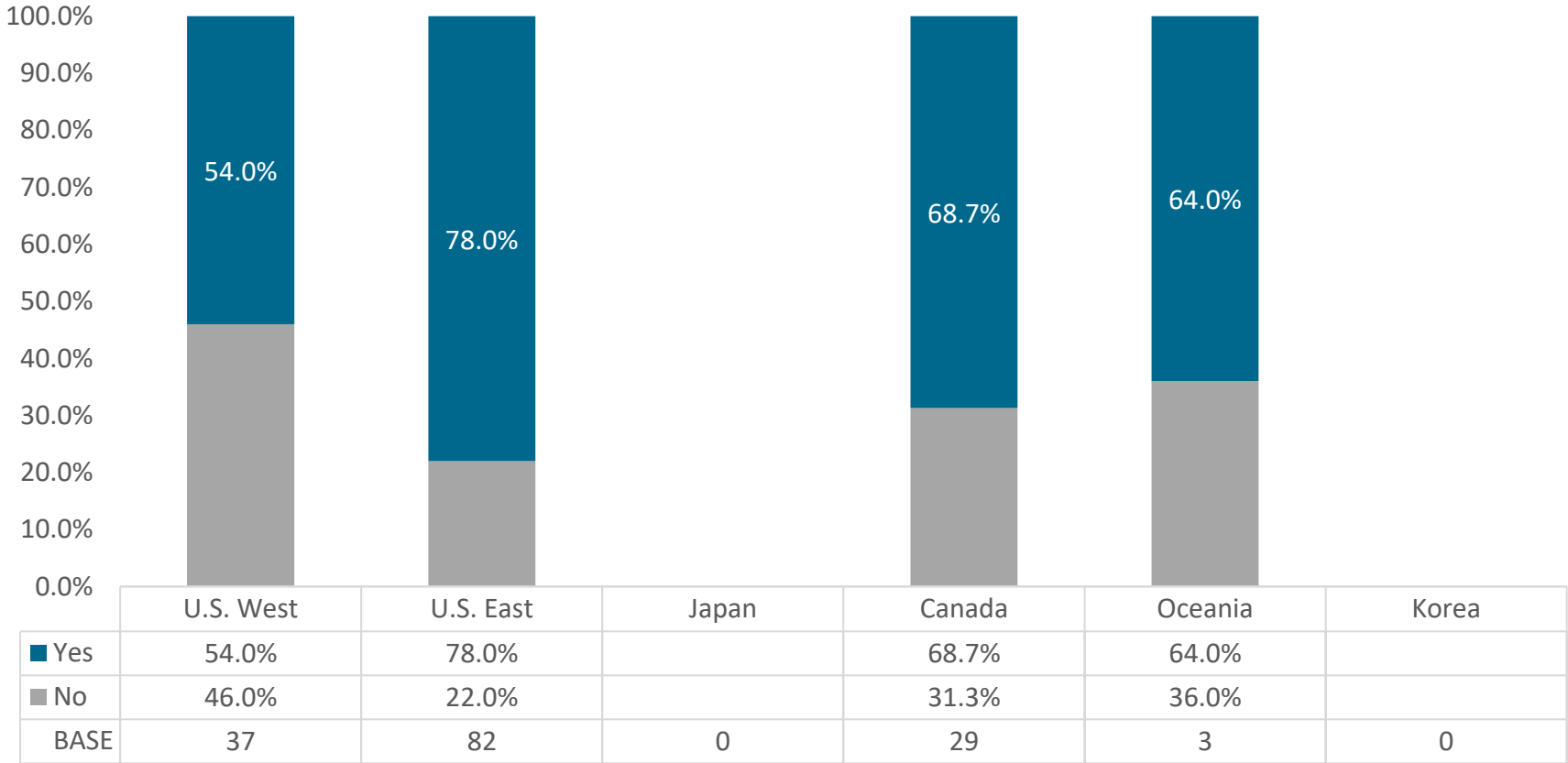
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	32.4%	40.5%	66.7%	40.2%	34.9%	38.7%
Hawaiian cultural events	7.5%	10.9%	0.0%	5.5%	0.0%	0.0%
Outdoor or sporting activities and events	23.6%	19.7%	0.0%	17.4%	15.1%	0.0%
Social media posts and videos	8.9%	11.5%	0.0%	11.5%	10.5%	5.5%
Hawaiian music	6.8%	5.7%	0.0%	4.5%	0.0%	0.0%
Television programs or movies filmed in Hawai'i	4.3%	6.7%	33.3%	5.8%	15.1%	5.5%
BASE	441	477	3	255	20	15

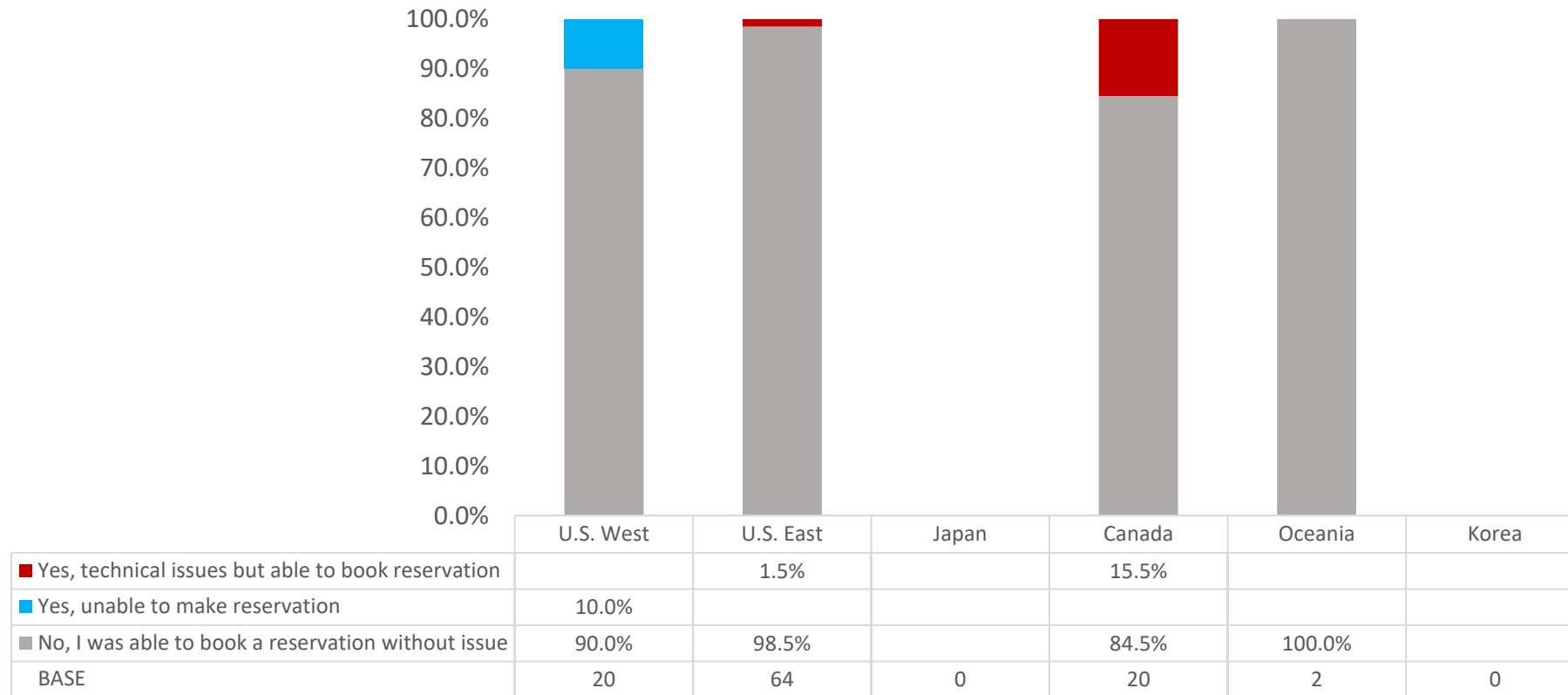
ATTRACTIONS- MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Alexander & Baldwin Sugar Museum	1.8%	0.8%	0.0%	2.0%	0.0%	0.0%
Aquarium Maui /Maui Ocean Center	19.0%	14.2%	0.0%	18.9%	9.2%	16.6%
Baldwin Missionary Home Museum	4.3%	3.2%	0.0%	4.0%	0.0%	0.0%
Hale Pa'i Printing House	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%
Haleakalā National Park	26.8%	37.2%	50.0%	30.0%	29.0%	55.5%
Haleki'i-Pihana Heiau State Monument	1.8%	1.5%	0.0%	1.2%	0.0%	0.0%
Hana Cultural Center	6.6%	9.2%	0.0%	11.5%	16.4%	0.0%
'Iao Valley State Monument	2.9%	2.7%	0.0%	2.8%	4.6%	5.5%
Kepaniwai Park & Heritage Gardens	2.3%	4.0%	0.0%	4.2%	0.0%	0.0%
Kula Botanical Garden	6.8%	5.5%	50.0%	5.9%	0.0%	5.5%
Maui Historical Society Bailey House Museum	2.7%	2.1%	0.0%	0.8%	0.0%	5.5%
Wai'ānapanapaa State Park	8.4%	17.1%	0.0%	10.9%	16.4%	0.0%
Whaler's Village Museum	17.5%	16.6%	50.0%	14.5%	18.4%	0.0%
Wo Hing Temple Museum	1.1%	0.6%	0.0%	2.0%	0.0%	0.0%

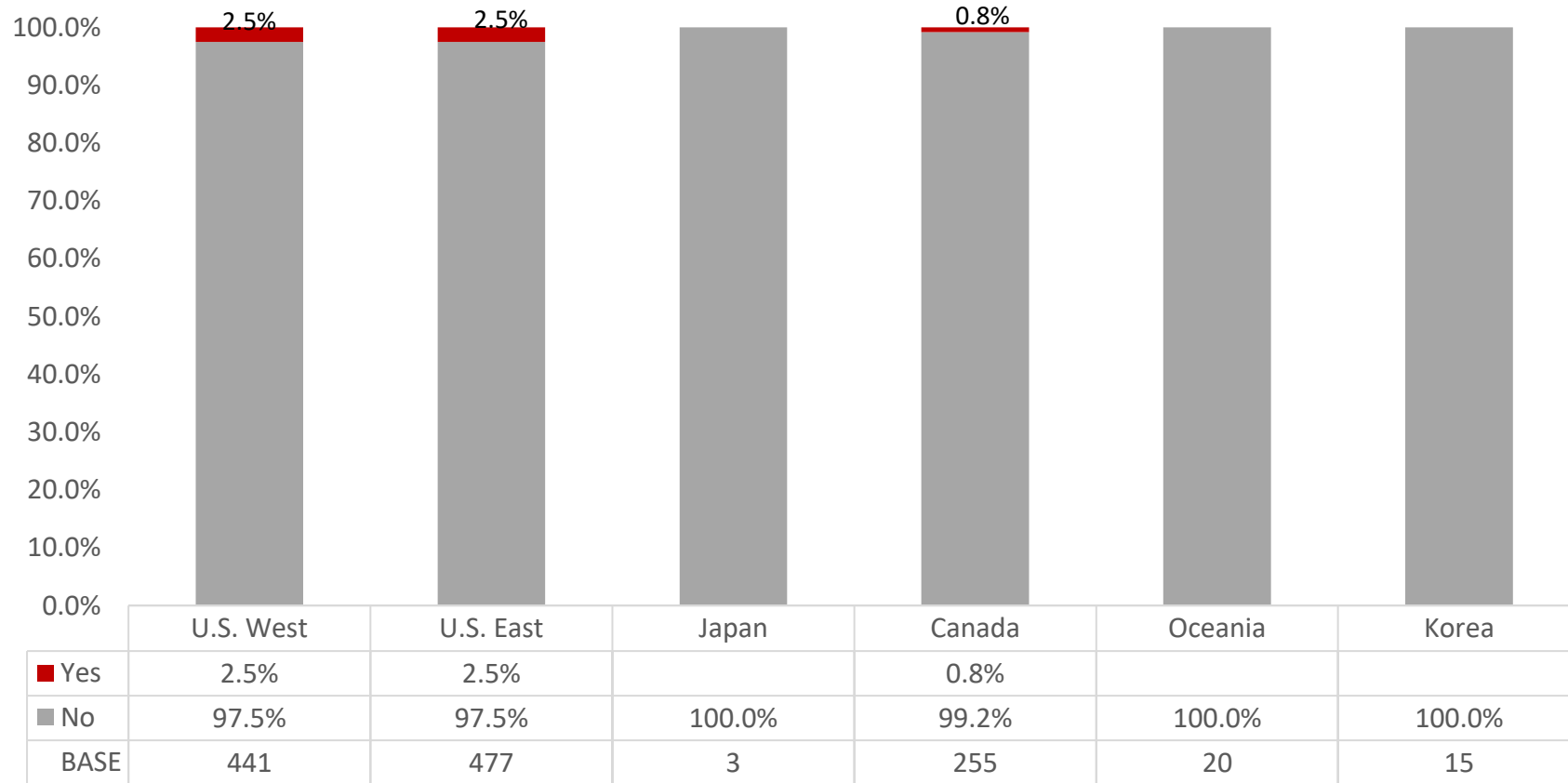
WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



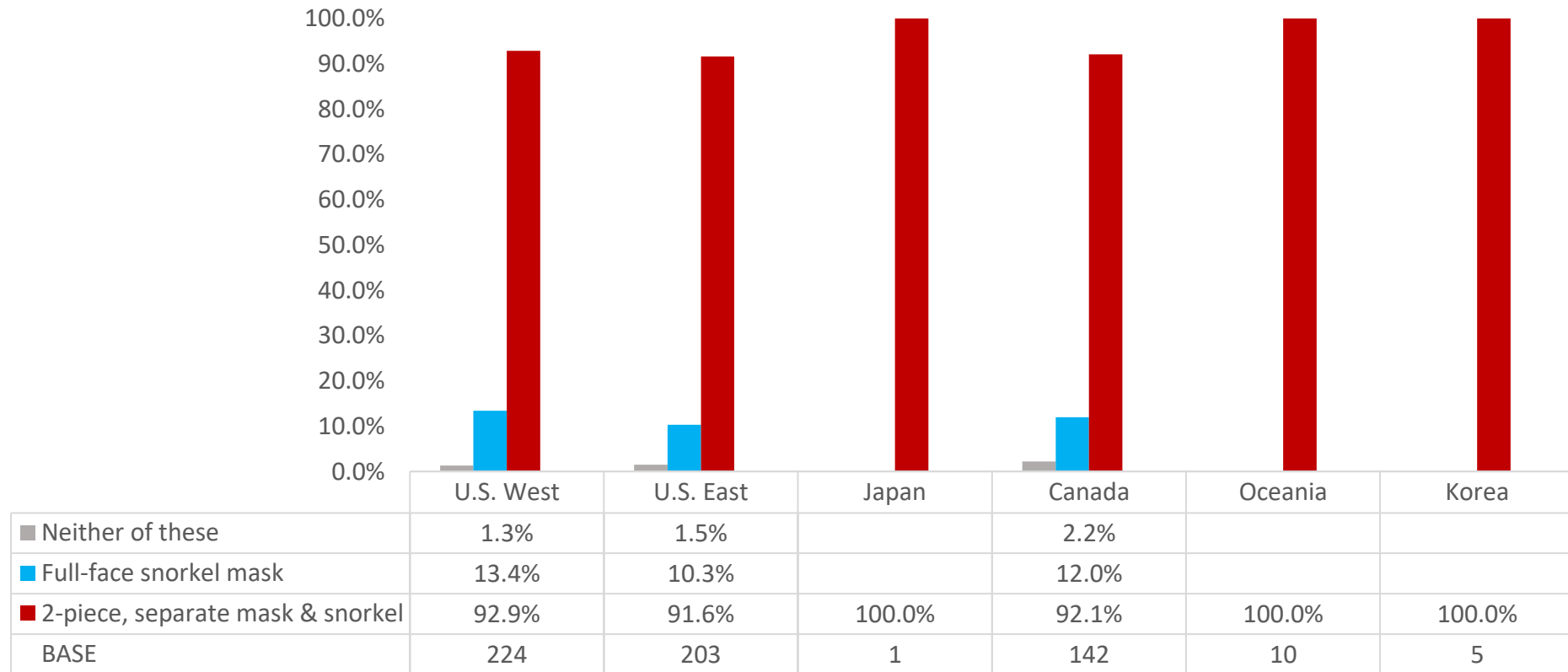
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Maui Marathon	27.2%	41.2%	-	50.0%	-	-
Sentry Tournament of Golf Champions	18.2%	25.3%		0.0%		
Other sporting event	18.2%	8.2%		0.0%		
Convention/Conference/ Retreat/Seminar/Meeting/ Workshop/Training/Work event	9.1%	8.4%	-	0.0%	-	-
Other (please specify festival/event name)	9.1%	8.4%	-	0.0%	-	-
Wedding/Honeymoon/ Anniversary/Birthday/ Funeral/Graduation	9.1%	0.0%	-	0.0%	-	-
Whale Watching	9.1%	0.0%	-	0.0%	-	-
Other Festival/concert	0.0%	8.4%		0.0%		
Kapalua Food & Wine Festival	0.0%	0.0%	0	50.0%	0	0
BASE	11	12		2		

SNORKELING EQUIPMENT USED - MAUI



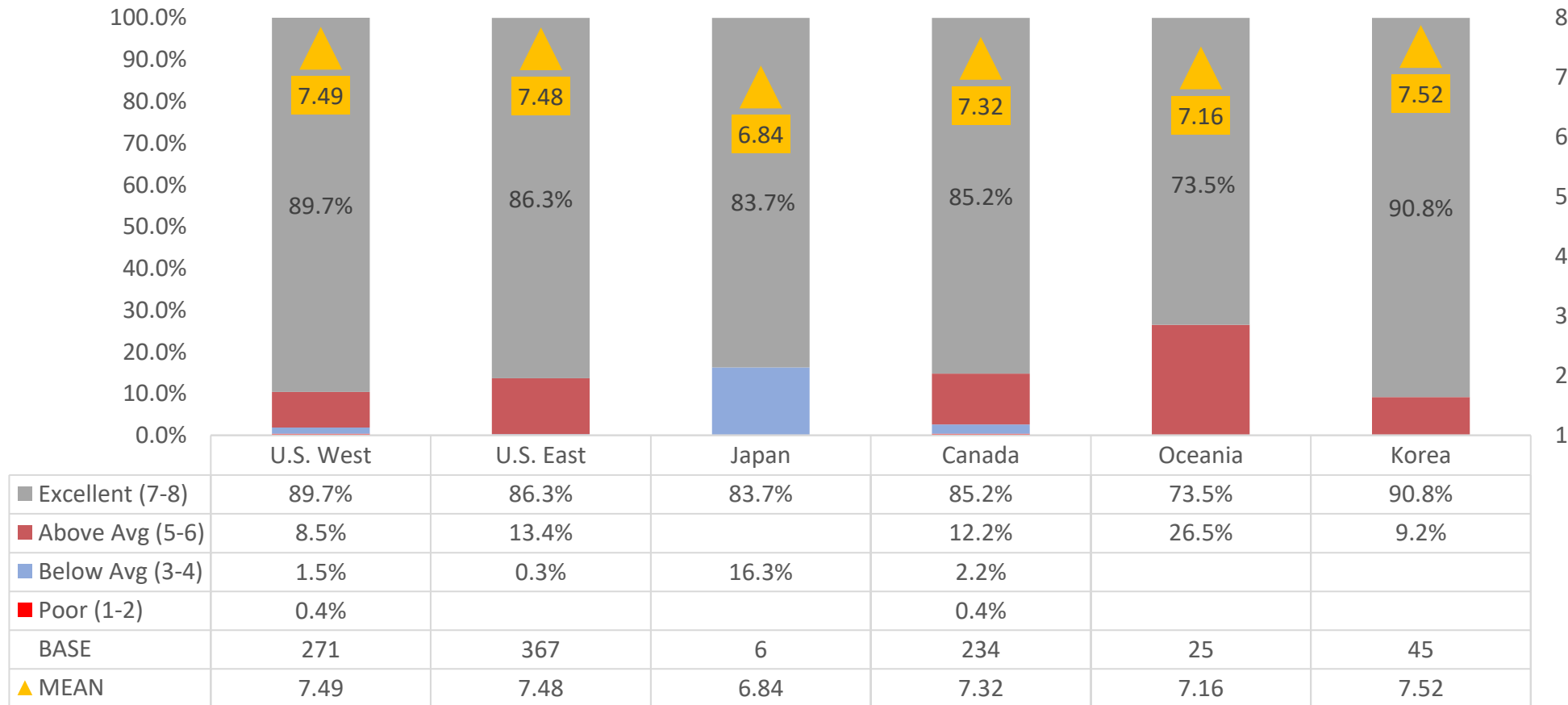
SNORKELING OCEAN SAFETY- MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	99.1%	100.0%	100.0%	100%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.9%	-	-	-	-	-
Yes, while snorkeling using a full-face snorkel mask	-	-	-	-	-	-
BASE	221	200	1	139	10	5

Section 8 – ISLAND OF HAWAII

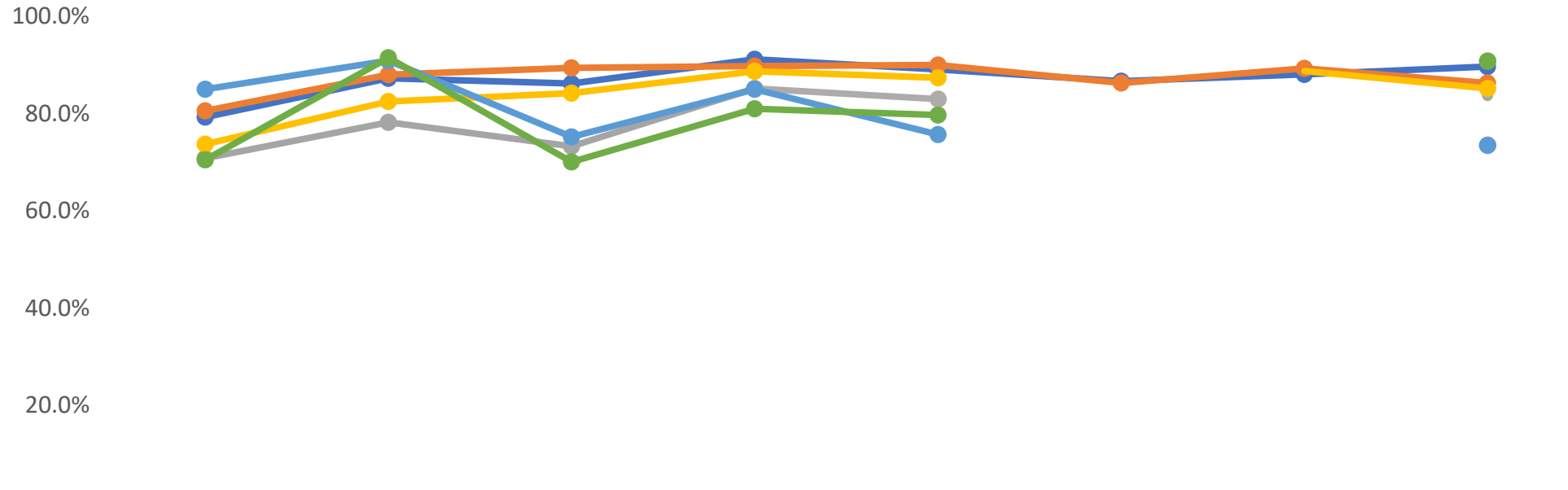
SATISFACTION - ISLAND OF HAWAI'I

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



SATISFACTION - ISLAND OF HAWAI'I

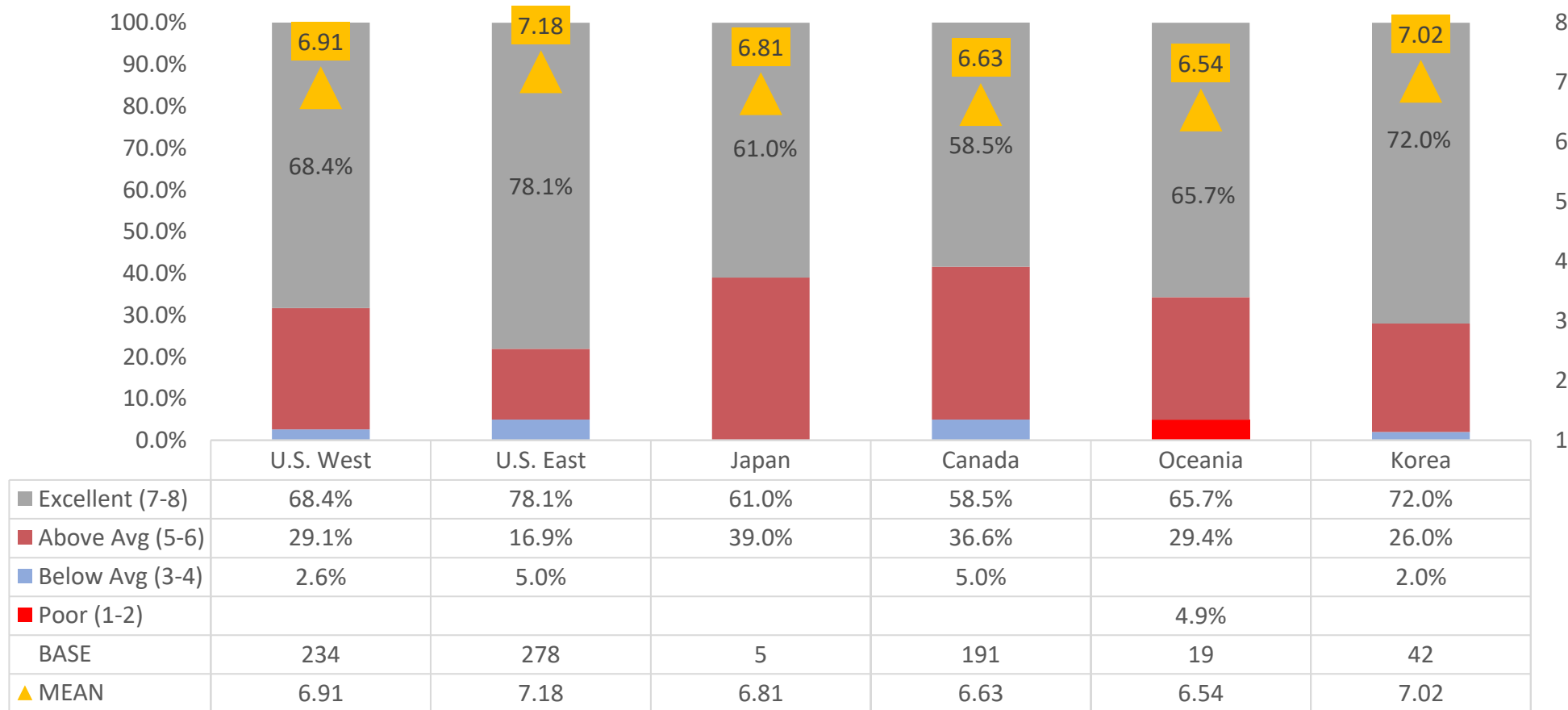
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022 P	Q1 2023 P
U.S. West	79.3%	87.3%	86.2%	91.2%	89.1%	86.7%	88.1%	89.7%
U.S. East	80.6%	88.0%	89.4%	89.8%	90.0%	86.3%	89.3%	86.3%
Japan	70.8%	78.2%	73.3%	85.2%	83.0%			83.7%
Canada	73.7%	82.5%	84.2%	88.7%	87.4%		88.8%	85.2%
Oceania	85.0%	90.9%	75.2%	85.0%	75.7%			73.5%
Korea	70.5%	91.5%	70.1%	81.0%	79.7%			90.8%

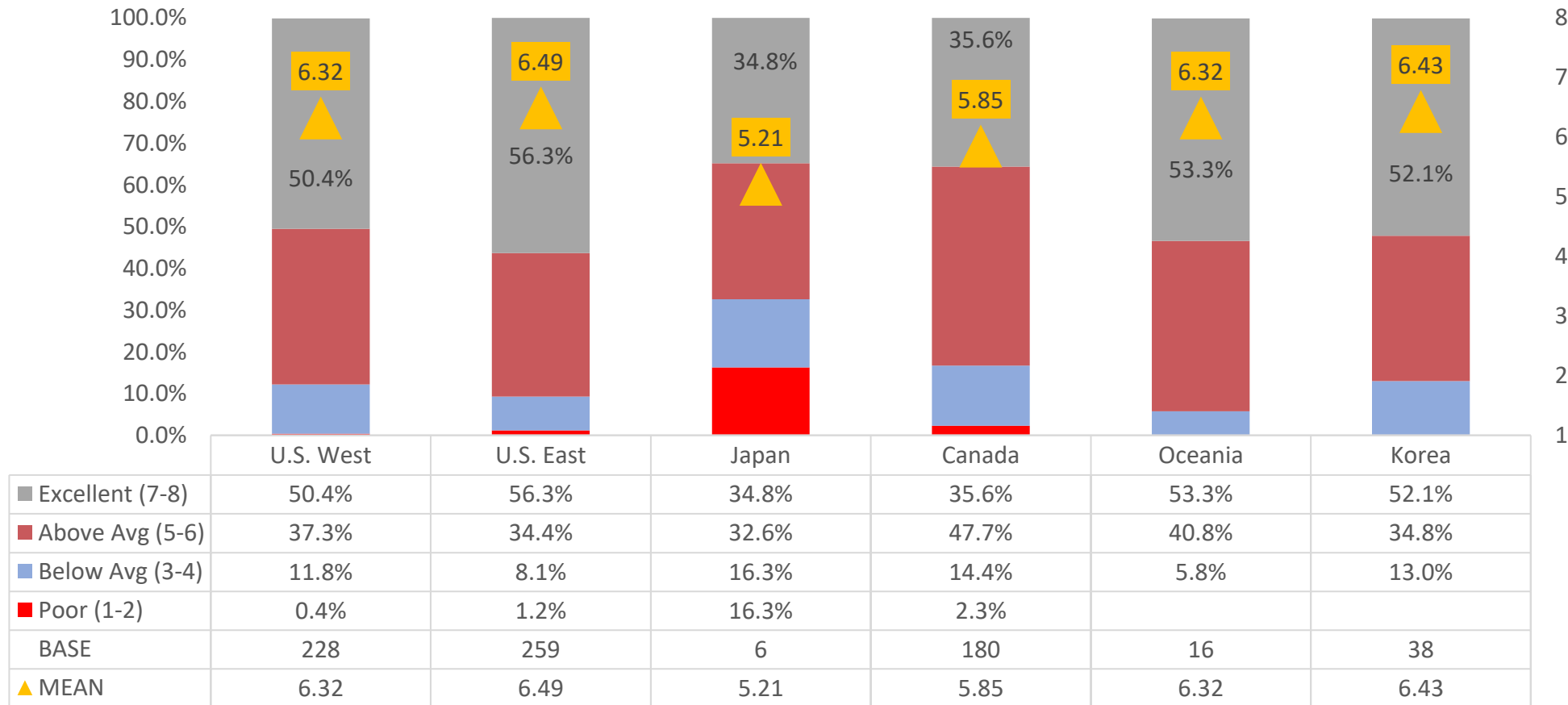
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



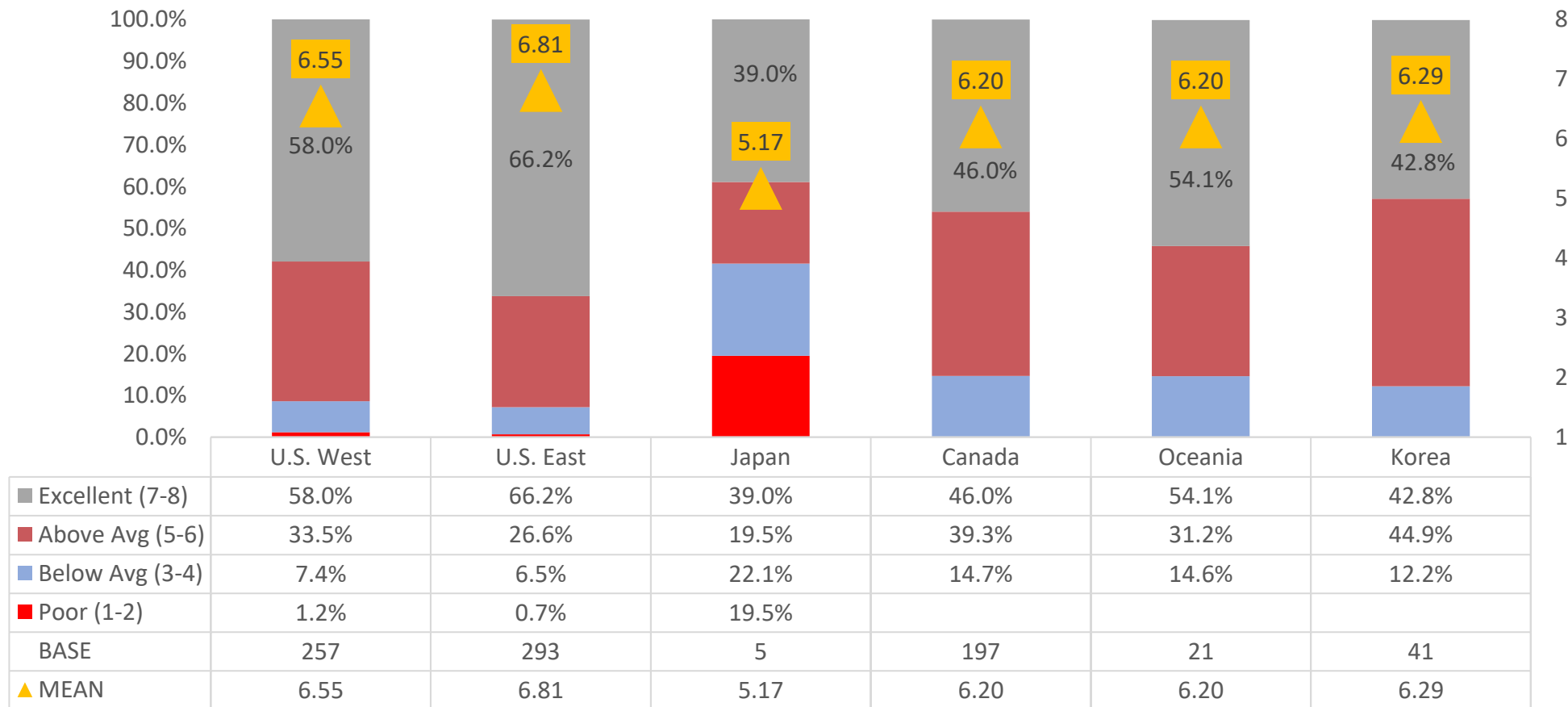
SHOPPING - ISLAND OF HAWAI'I

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



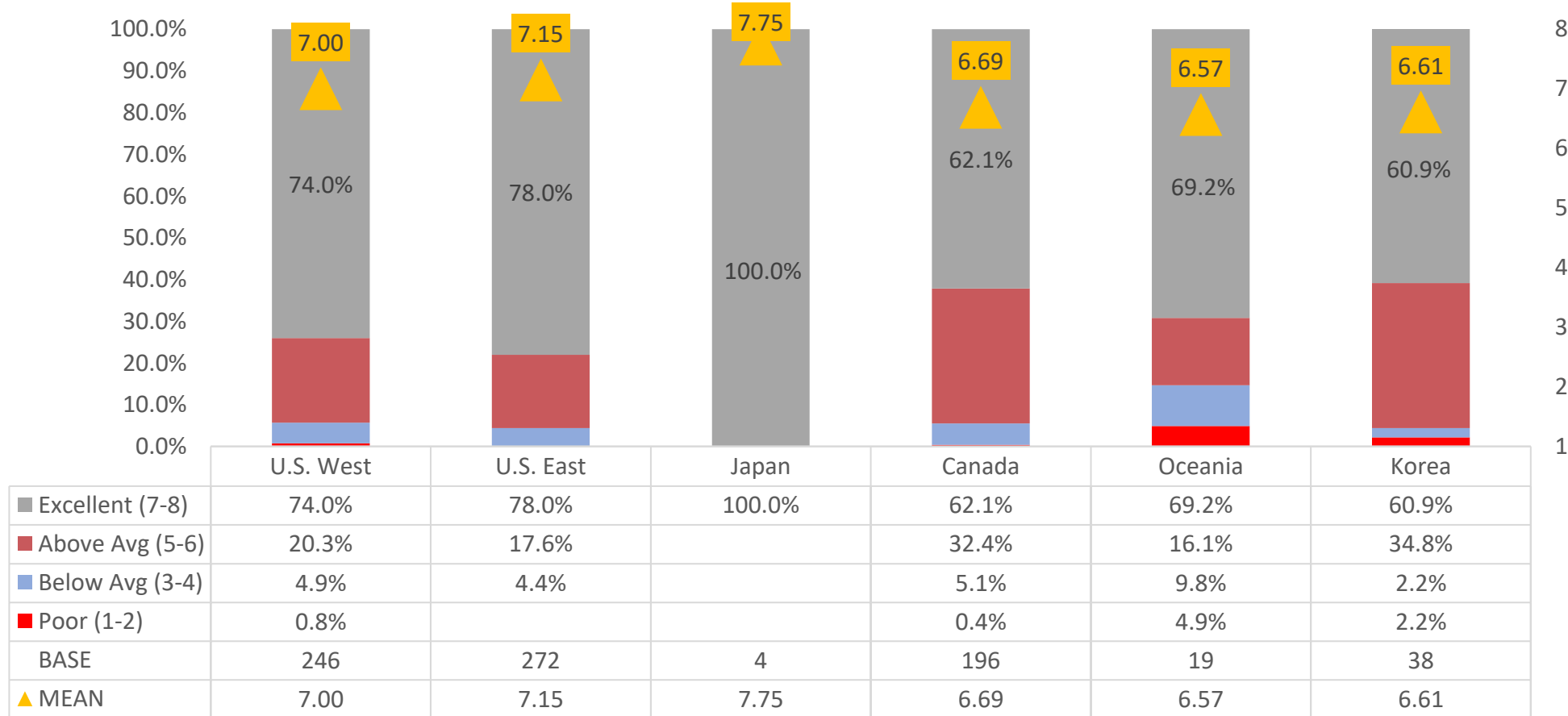
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



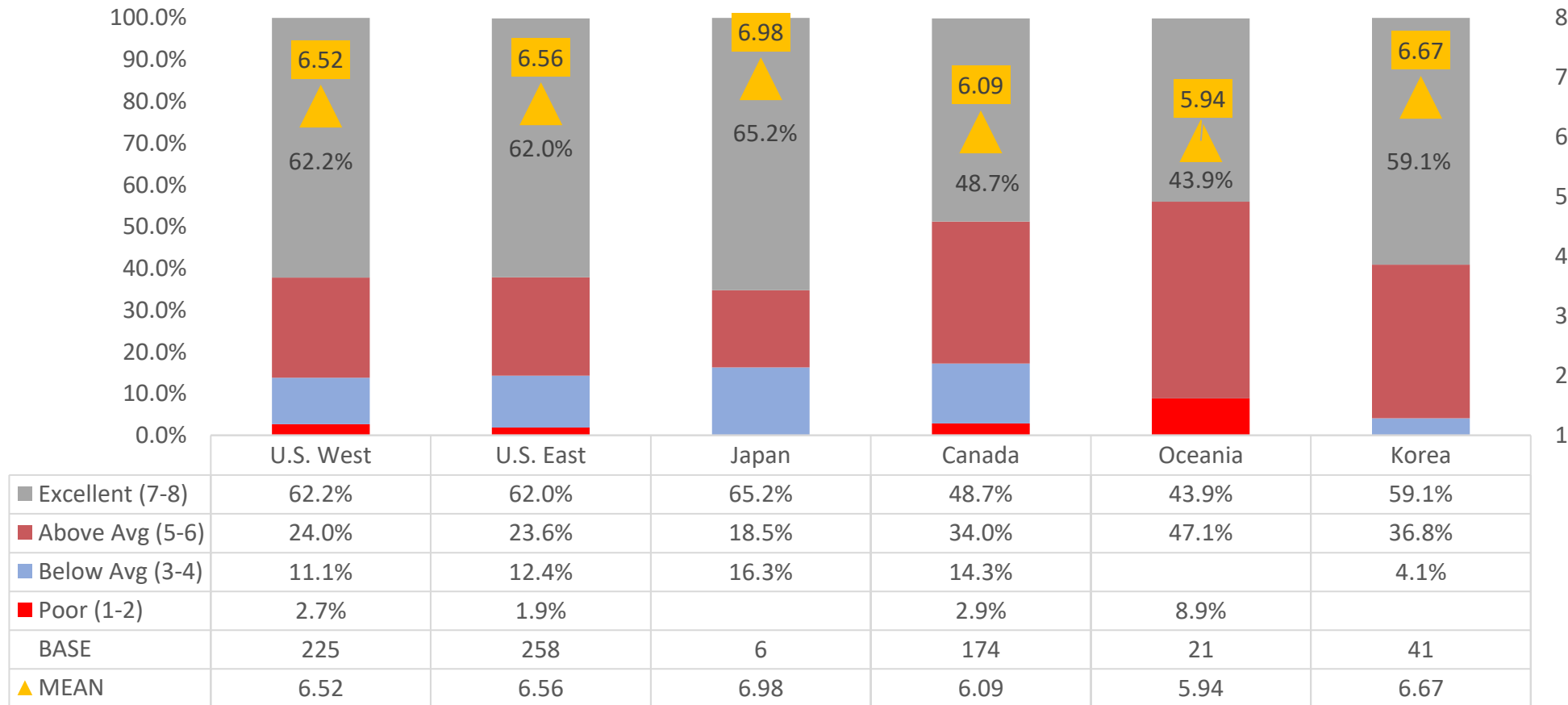
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



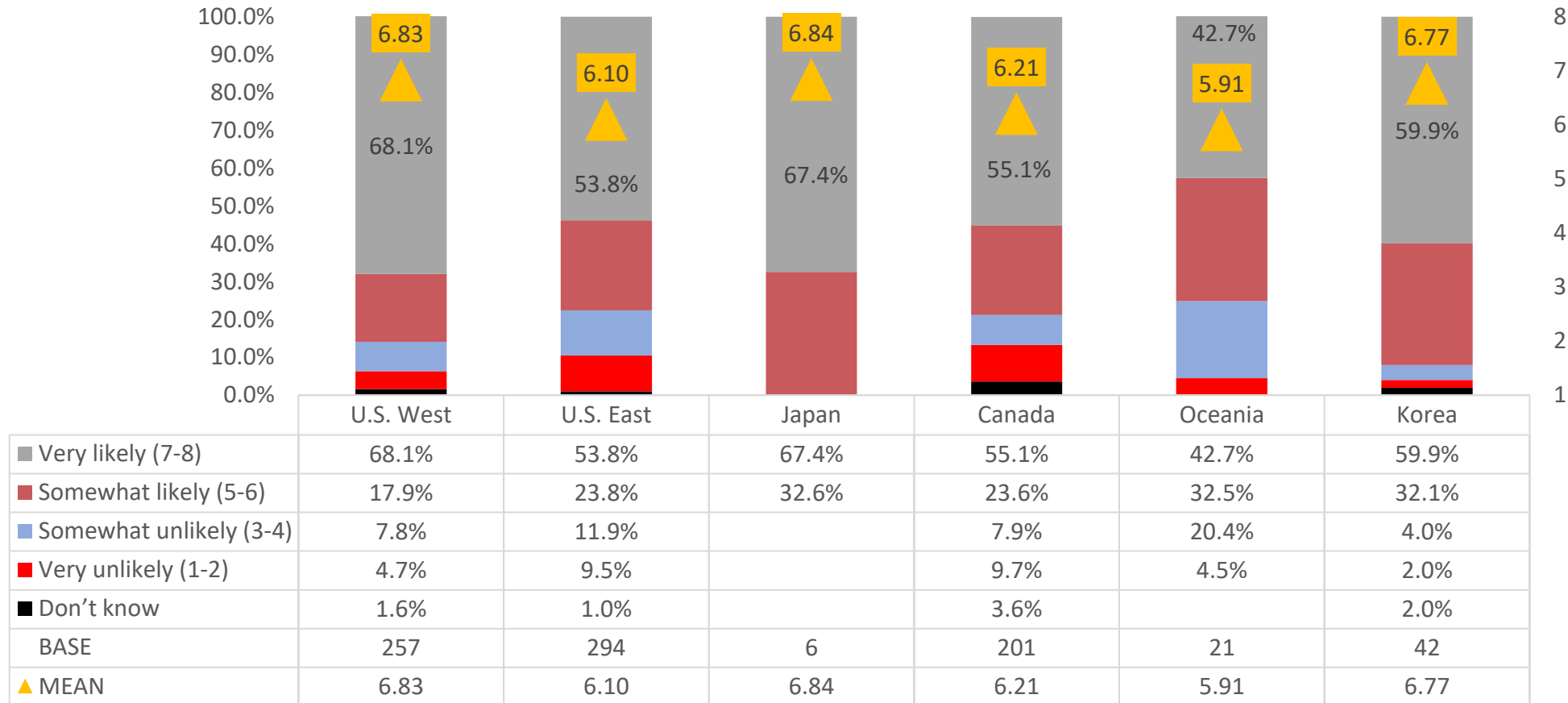
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

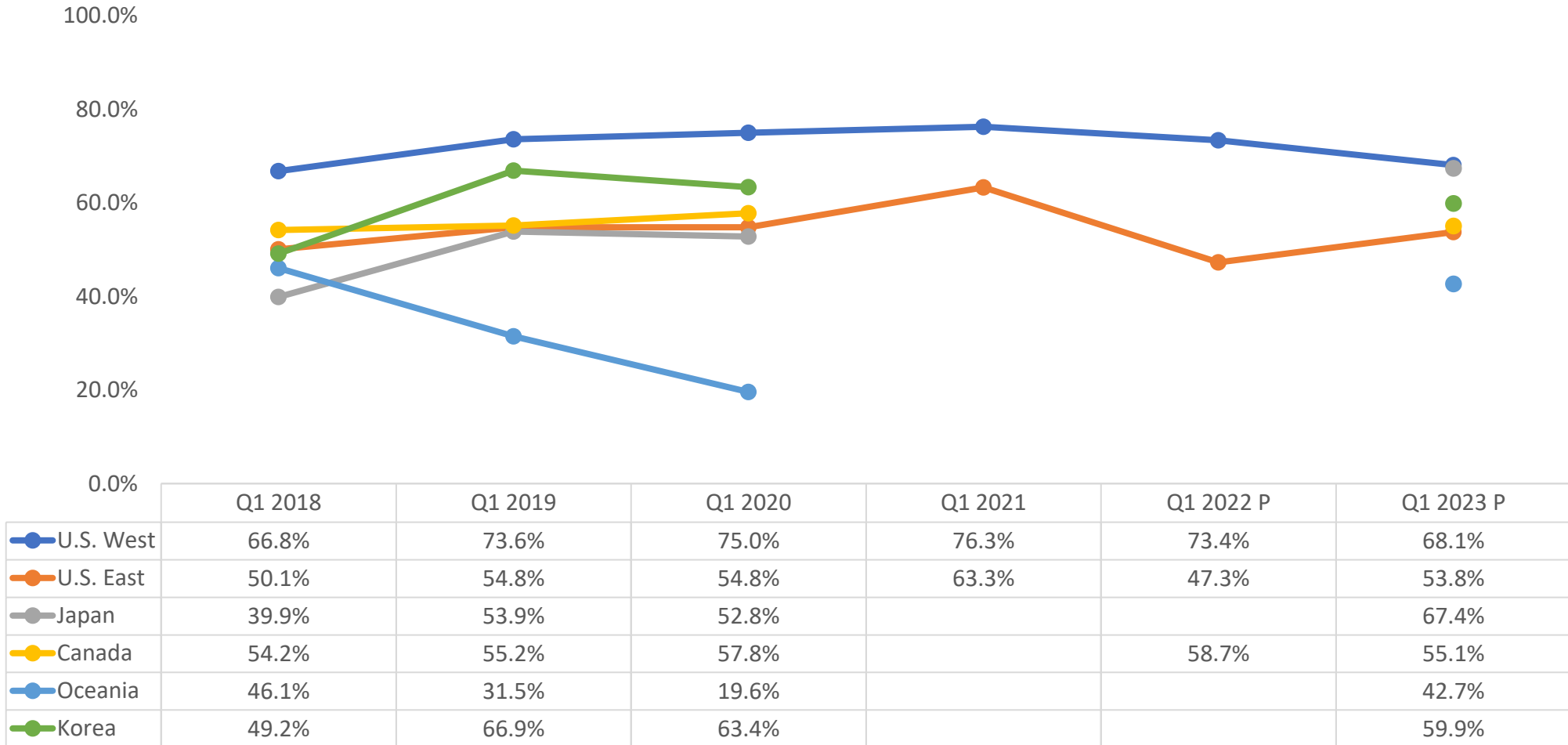
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



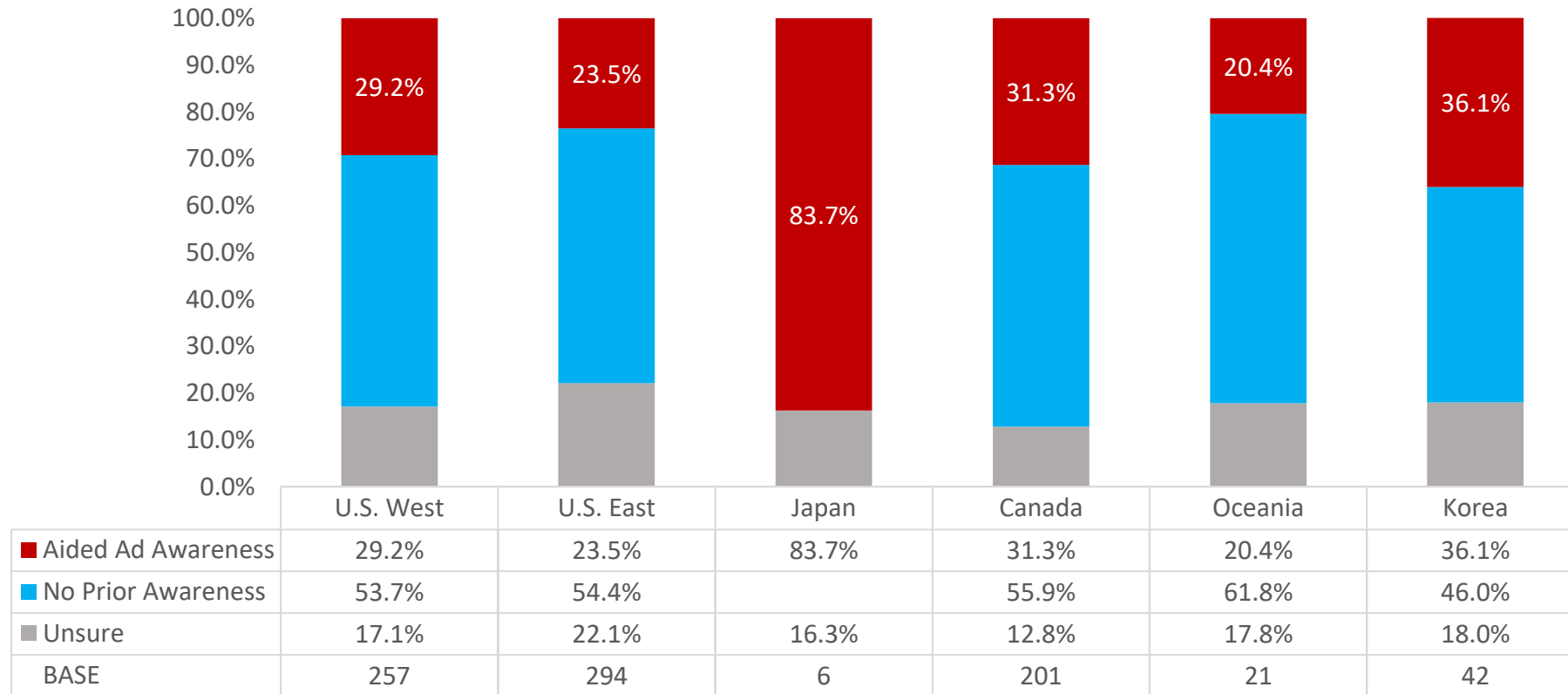
LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

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	43.2%	56.4%	65.2%	42.8%	56.1%	46.0%
Outdoor or sporting activities and events	18.3%	15.0%	18.5%	17.8%	28.0%	8.0%
Hawaiian cultural events	10.1%	14.3%	0.0%	11.5%	0.0%	8.0%
Social media posts and videos	7.8%	10.2%	32.6%	9.5%	0.0%	16.0%
Television programs or movies filmed in Hawai'i	5.1%	11.2%	48.9%	10.4%	10.2%	16.0%
Hawaiian music	7.8%	10.2%	0.0%	6.1%	0.0%	6.0%
BASE	257	294	6	201	21	42

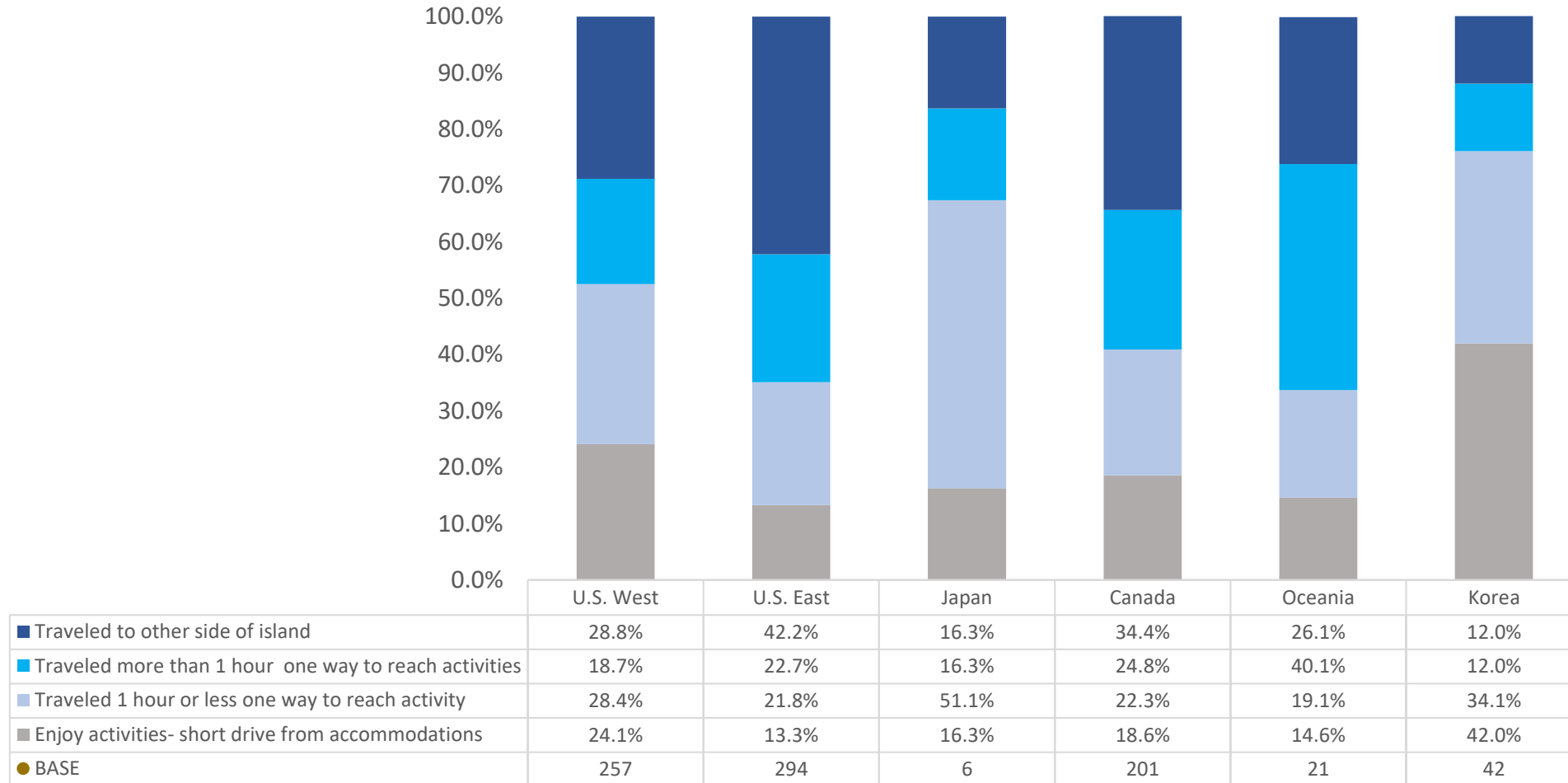
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
'Akaka Falls	22.2%	32.3%	0.0%	27.7%	21.6%	30.1%
Botanical Gardens	26.8%	16.0%	0.0%	20.3%	10.2%	10.0%
H.N. Greenwell Store	3.5%	4.1%	0.0%	6.6%	5.7%	2.0%
Hawai'i Volcanoes National Park	54.5%	70.7%	34.8%	63.5%	66.2%	51.9%
Hilo Farmers Market	22.6%	19.7%	16.3%	28.0%	21.6%	14.0%
Hulihe'e Palace	2.3%	3.1%	0.0%	4.6%	11.5%	4.0%
'Imiloa Astronomy Ctr	1.6%	2.7%	0.0%	1.3%	0.0%	0.0%
Kaloko-Honokōhau National Historical Park	10.1%	11.9%	0.0%	11.1%	5.7%	2.0%
Kona Coffee Living History Farm	12.1%	13.6%	0.0%	16.1%	10.2%	50.1%
Lili'uokalani Park and Garden	9.3%	11.2%	0.0%	0.9%	10.2%	8.0%

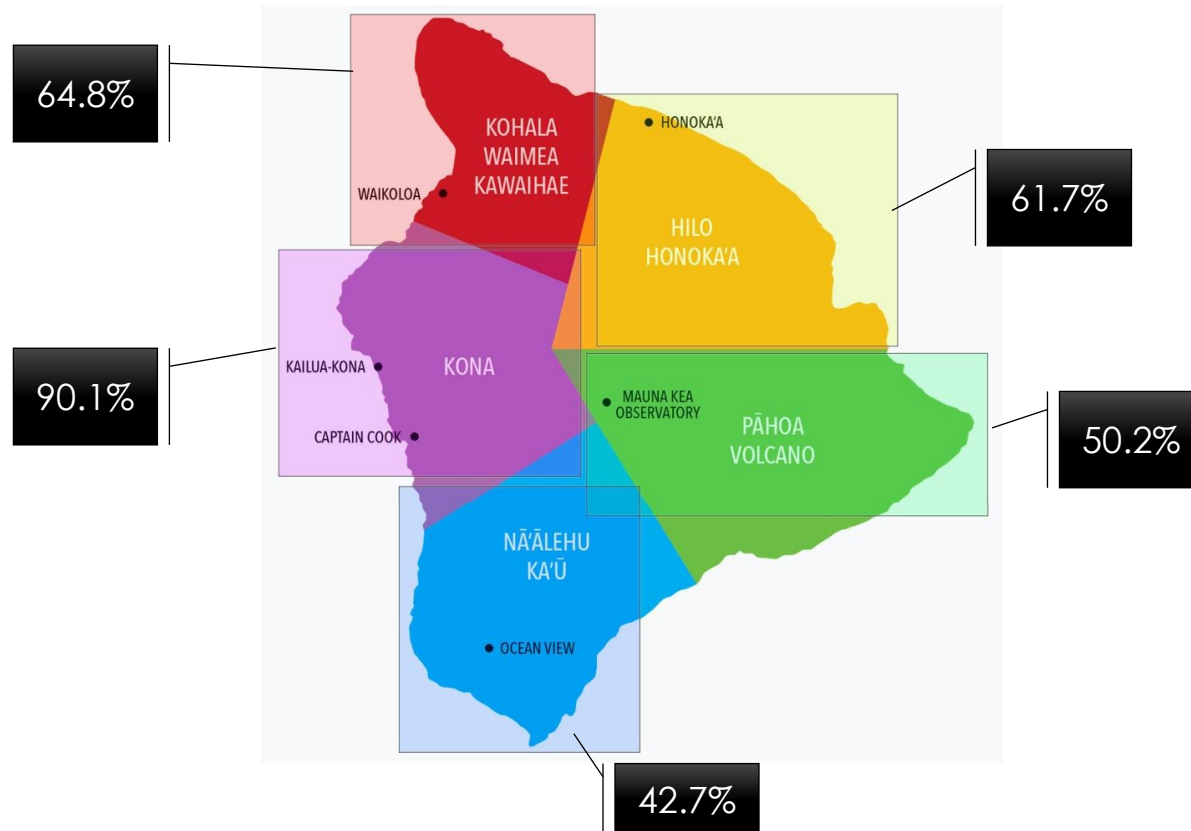
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Lyman House Memorial Museum	1.9%	2.1%	0.0%	0.5%	0.0%	0.0%
Maunakea Visitor Ctr/ Summit	10.1%	13.2%	34.8%	16.8%	19.1%	40.1%
Orchid Farm	2.3%	2.7%	16.3%	1.8%	0.0%	0.0%
Pacific Tsunami Museum	2.3%	2.7%	0.0%	4.5%	4.5%	0.0%
Pana'ewa Rainforest Zoo & Garden	4.3%	4.1%	0.0%	2.0%	0.0%	0.0%
Pu'uhonua o Hōnaunau National Historical Park	16.7%	20.4%	0.0%	24.6%	5.7%	2.0%
Pu'ukoholā Heia National Historical Site	12.8%	10.5%	0.0%	15.1%	5.7%	0.0%
Punalu'u Black Sand Beach	27.6%	39.1%	51.1%	38.6%	47.1%	18.0%
Rainbow Falls	21.4%	37.3%	51.1%	20.5%	24.8%	18.0%
Volcano Art Center	9.3%	10.5%	0.0%	5.3%	5.7%	18.0%

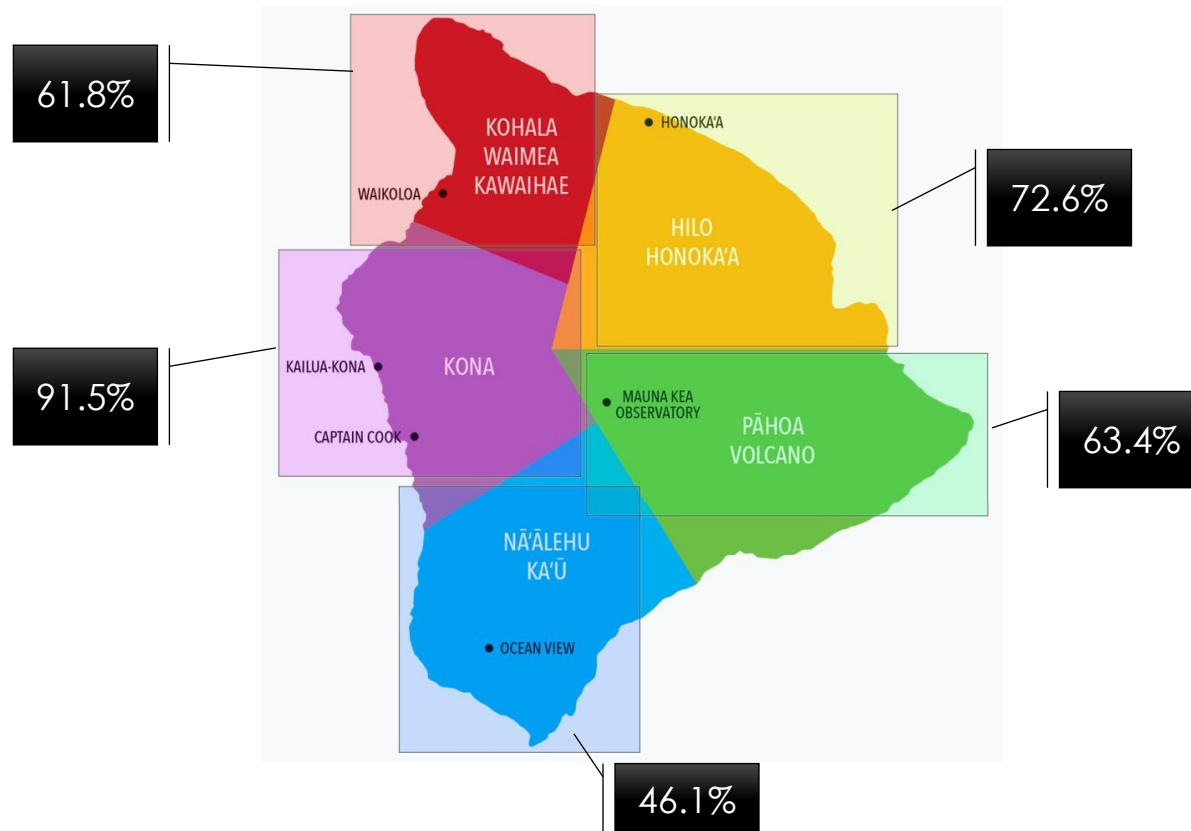
TRAVEL ON ISLAND OF HAWAI'I



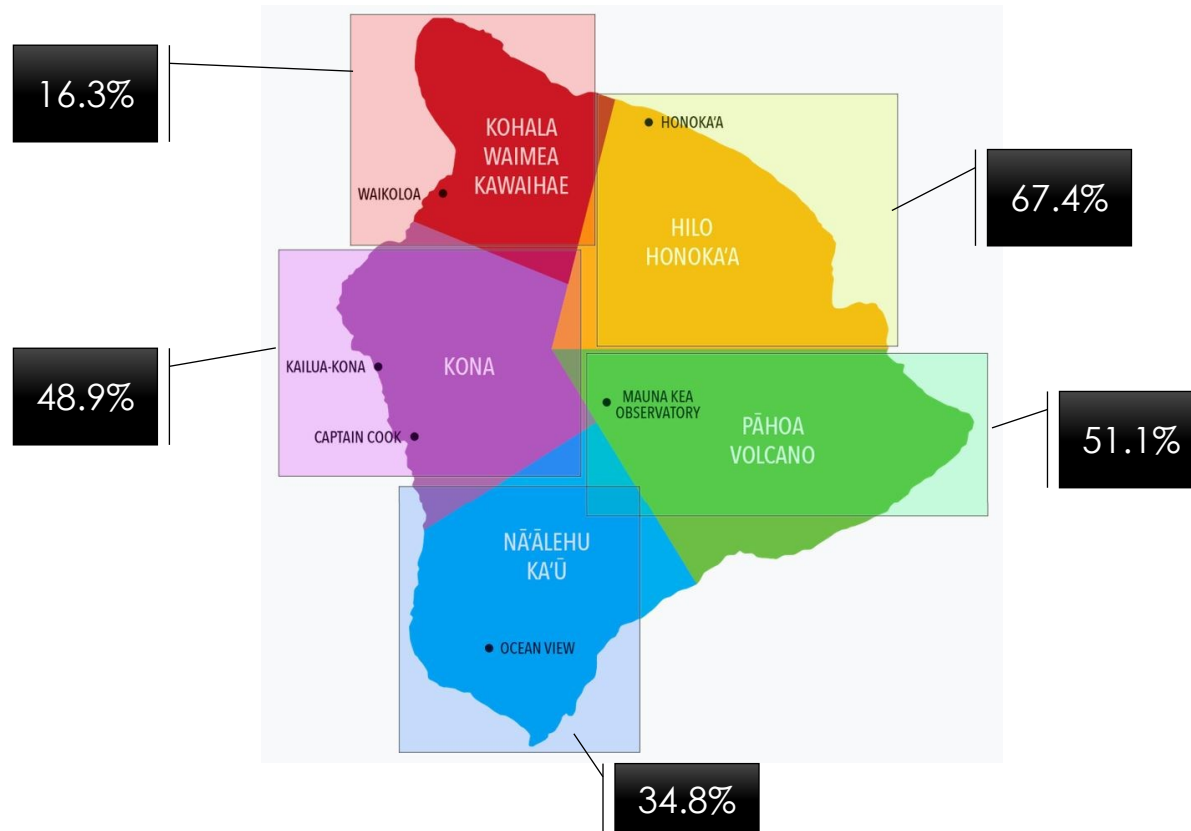
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



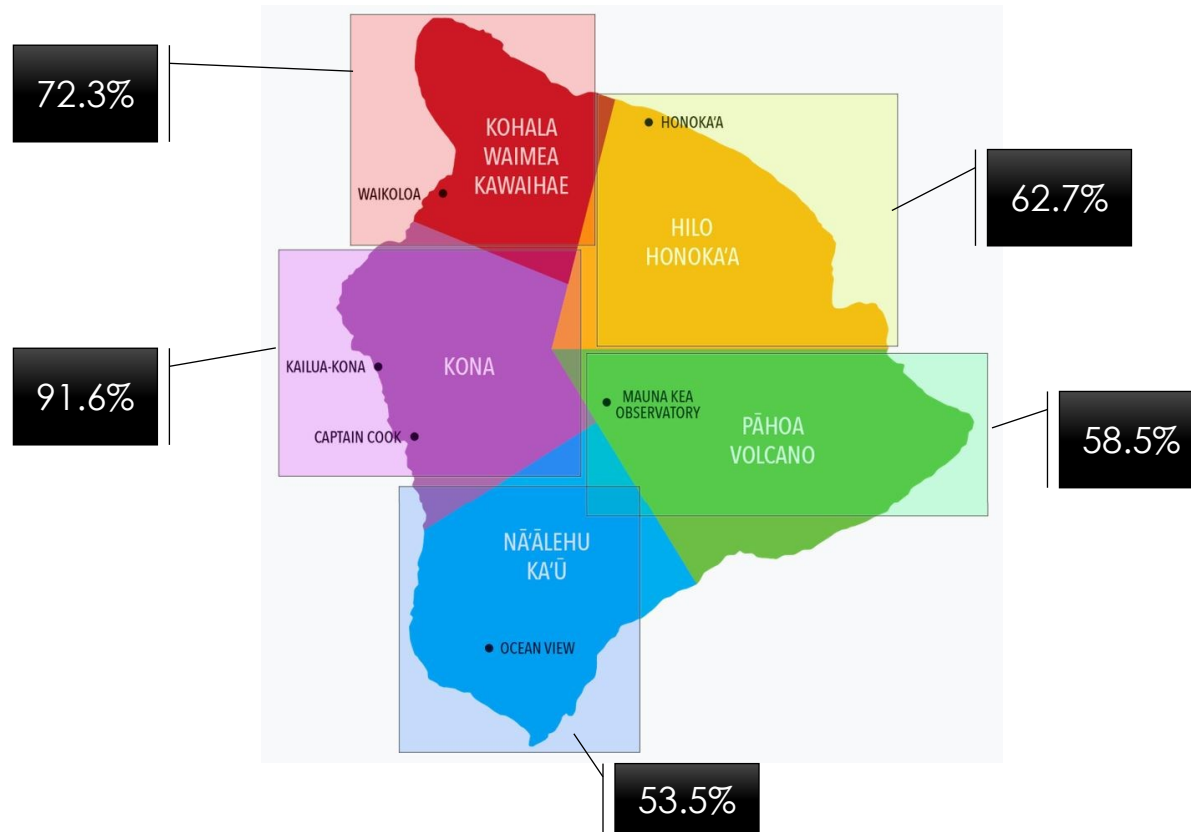
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



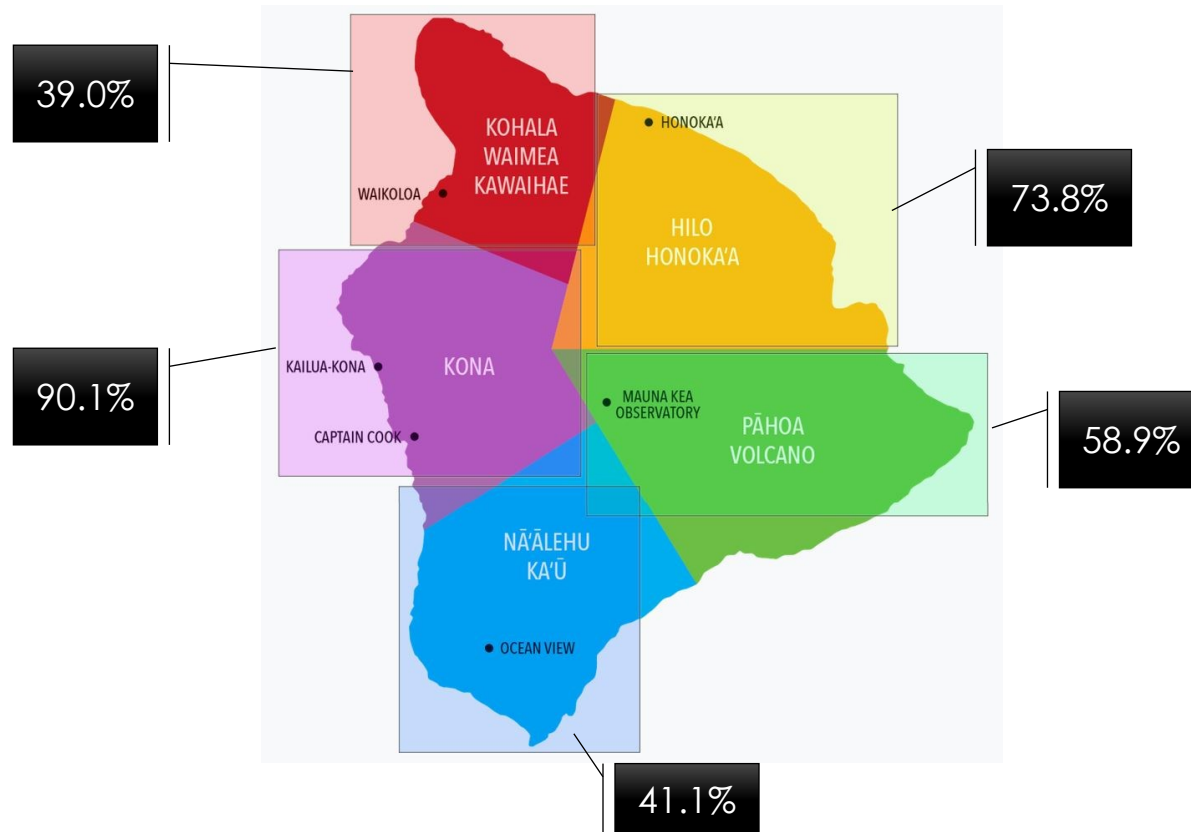
AREAS VISITED ISLAND OF HAWAI'I JAPAN



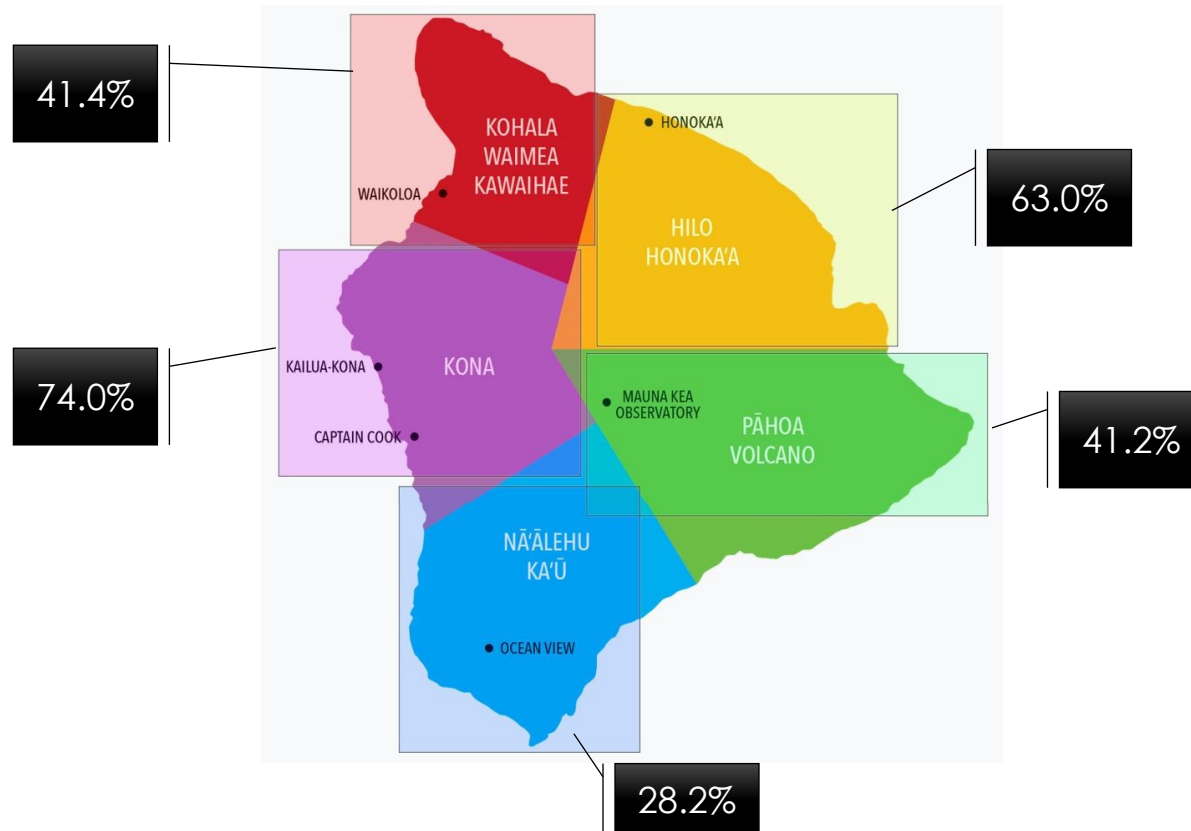
AREAS VISITED ISLAND OF HAWAI'I CANADA



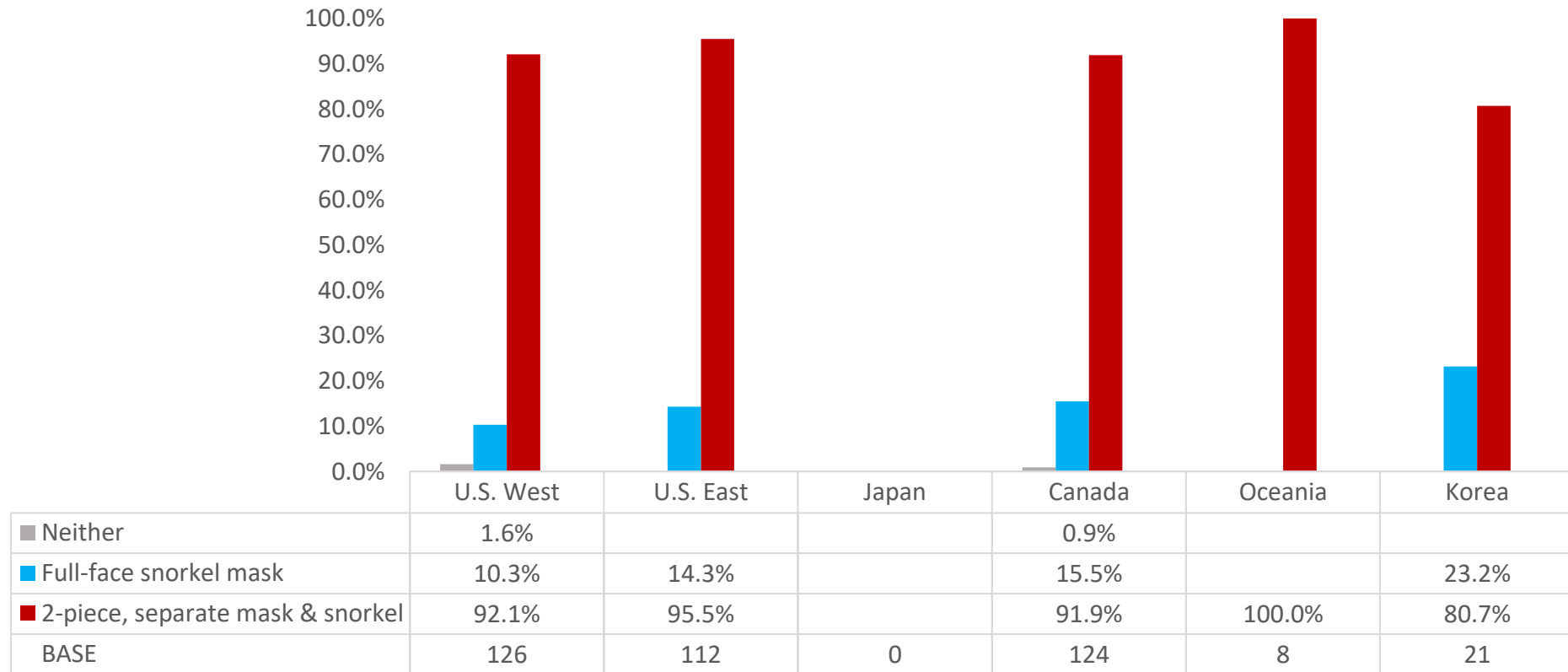
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



AREAS VISITED ISLAND OF HAWAI'I KOREA



SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I

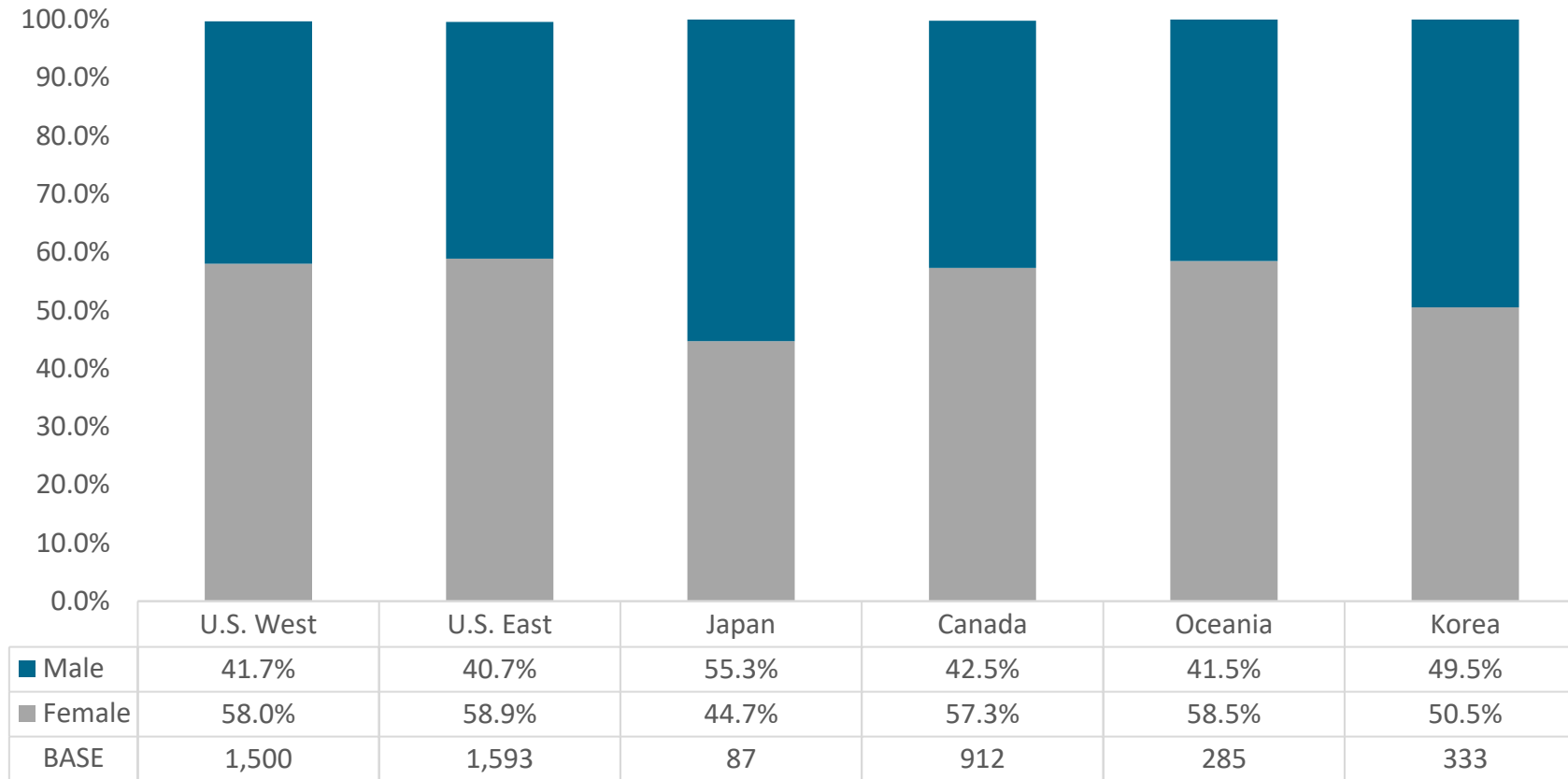


SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

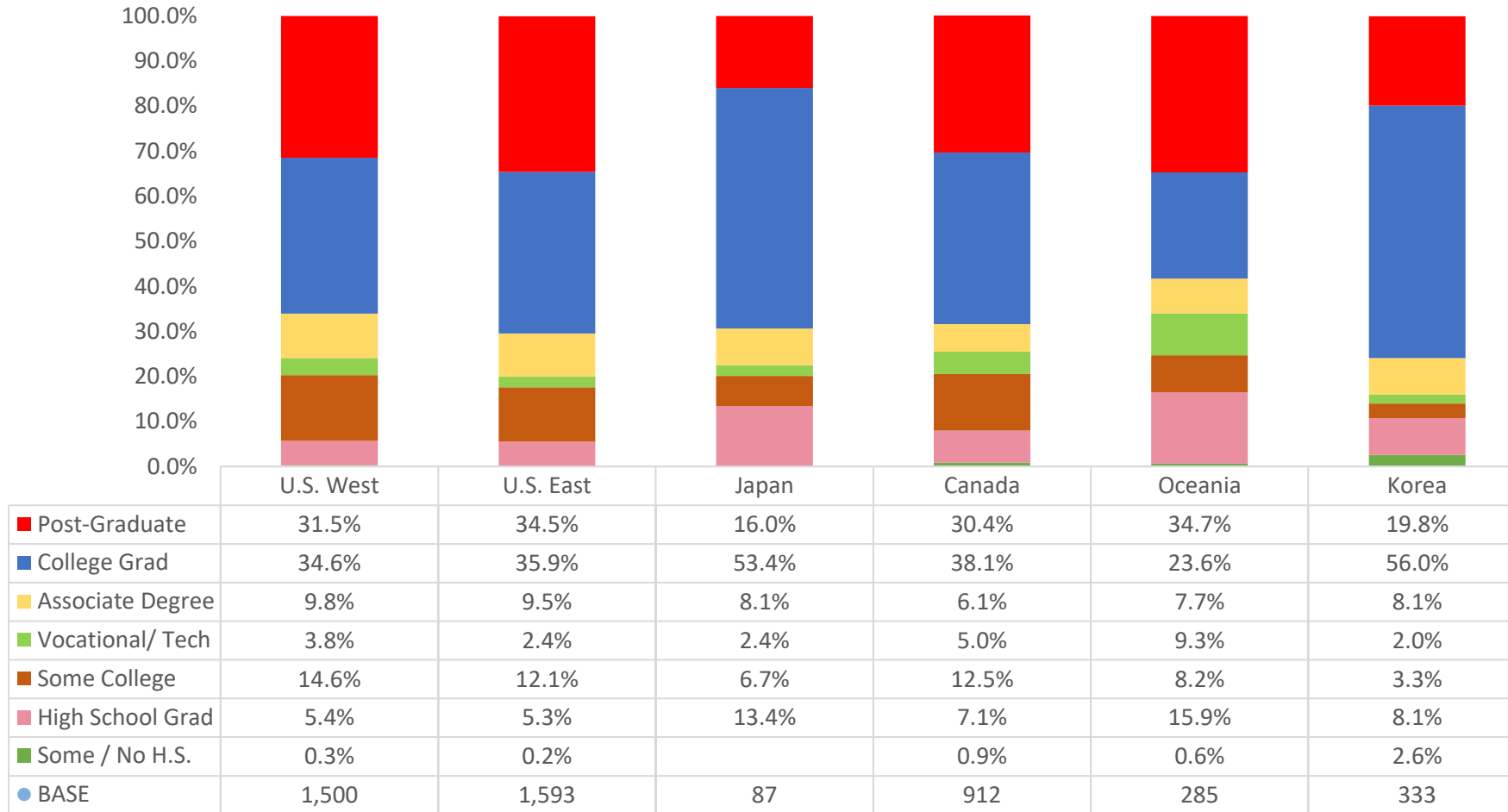
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	100.0%	97.3%	-	99.1%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	-	2.7%	-	0.9%	-	-
Yes, while doing another type of ocean activity	-	-	-	-	-	-
BASE	124	112	0	123	8	21

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	4.1%	4.9%	3.7%	4.4%
\$40,000 to \$59,999	6.0%	6.2%	5.4%	6.8%
\$60,000 to \$79,999	8.6%	8.3%	7.9%	5.5%
\$80,000 to \$99,999	10.0%	9.5%	11.5%	5.9%
\$100,000 to \$124,999	13.3%	13.9%	11.3%	12.7%
\$125,000 to \$149,999	11.5%	13.2%	14.4%	9.8%
\$150,000 to \$174,999	9.5%	9.7%	9.8%	7.7%
\$175,000 to \$199,999	9.0%	5.9%	7.1%	8.9%
\$200,000 to \$249,999	9.3%	8.2%	11.5%	15.0%
\$250,000 +	18.7%	20.1%	17.5%	23.2%

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	11.9%
¥3.5 - ¥4.5 million	8.1%
¥4.5 - ¥5.5 million	10.3%
¥5.5 - ¥6.5 million	6.1%
¥6.5 - ¥7.5 million	4.7%
¥7.5 - ¥8.5 million	5.7%
¥8.5 - ¥10.0 million	15.0%
¥10.0 - ¥15.0 million	6.9%
¥15.0 - ¥20.0 million	15.0%
¥20.0 million +	16.3%

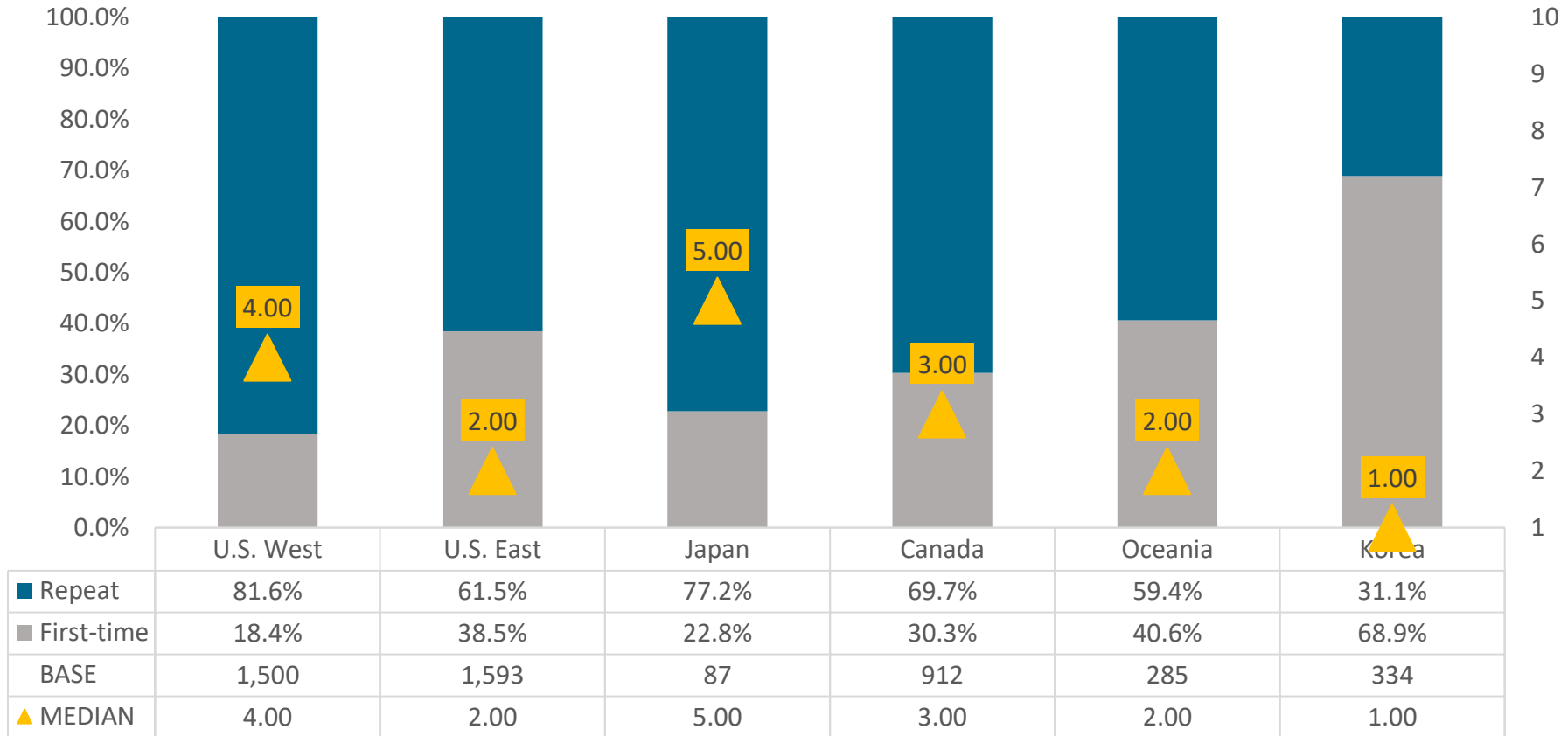
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	13.0%
₩16,305,000-27,173,999	6.3%
₩27,174,000-38,041,999	11.0%
₩38,042,000-48,911,999	10.4%
₩48,912,000-59,781,999	10.2%
₩59,782,000-70,652,999	8.0%
₩70,653,000-81,520,999	7.7%
₩81,521,000-92,390,999	4.4%
₩92,391,000-103,259,999	3.3%
₩103,260,000-149,999,999	11.0%
₩150,000,000-199,999,999	2.5%
₩200,000,000+	12.2%

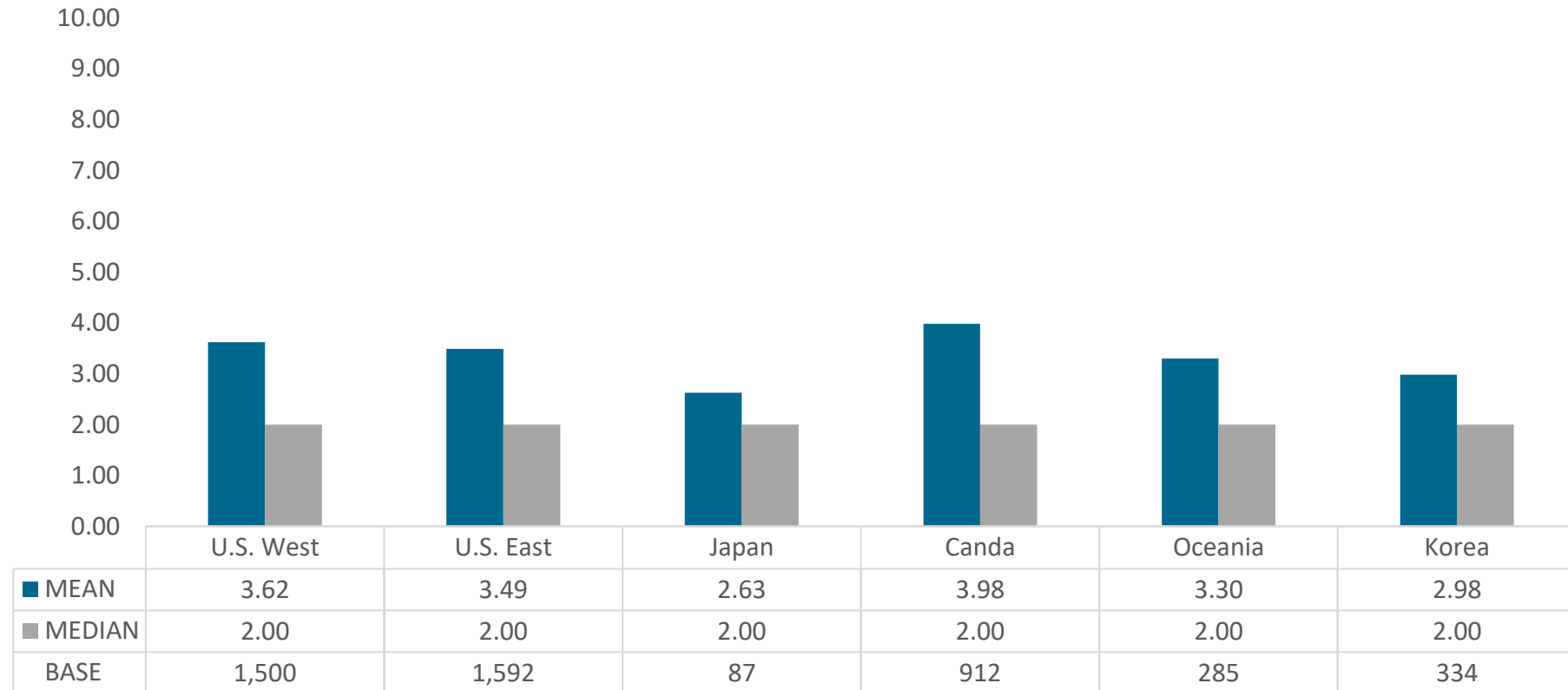
VISITOR PROFILE - AGE



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
My spouse	59.9%	60.0%	52.6%	64.9%	61.5%	68.0%
Other adult members of my family	25.3%	24.8%	23.5%	26.3%	29.8%	18.0%
My child(ren)/ grandchild(ren) under 18	24.5%	15.9%	13.7%	26.2%	35.1%	12.7%
My friends/ associates	16.1%	16.6%	15.1%	17.9%	10.0%	9.7%
Myself only (traveled alone/ no one else)	9.9%	10.0%	21.8%	6.3%	10.9%	4.6%
My girlfriend/ boyfriend	8.6%	7.3%	2.4%	6.4%	4.4%	2.0%
Same gender partner	1.1%	1.3%	0.0%	1.1%	0.3%	0.0%

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 table summarize the number of surveys completed for the island of O'ahu.

MMA	Completed	Margin of Error+
U.S. West	660	3.81
U.S. East	926	3.22
Japan	84	10.69
Canada	406	4.86
Oceania	270	5.96
Korea	312	5.55
China	25	19.60
All MMAs	2,683	1.89

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 table summarize the number of surveys completed for the island of Kaua'i.

MMA	Completed	Margin of Error +
U.S. West	253	6.16
U.S. East	295	5.71
Japan	1	98.0
Canada	188	7.15
Oceania	14	26.19
Korea	17	23.77
China	1	98.0
All MMAs	769	3.53

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 table summarize the number of surveys completed for the island of Maui.

MMA	Completed	Margin of Error +
U.S. West	474	4.50
U.S. East	590	4.03
Japan	3	56.58
Canada	292	5.74
Oceania	31	17.60
Korea	17	23.77
China	4	49.00
All MMAs	1,411	2.61

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 table summarize the number of surveys completed for the island of Hawai'i.

MMA	Completed	Margin of Error +
U.S. West	271	5.95
U.S. East	367	5.12
Japan	6	40.01
Canada	234	6.41
Oceania	25	19.60
Korea	45	14.61
China	6	40.01
All MMAs	954	3.17

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