

Visitor Satisfaction Study

Q3 2021

Prepared for:
Hawai'i Tourism Authority

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METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. For Q3 2021, the sampled visitor markets include: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), and U.S. East (all other states in the Continental U.S.).

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	1,864	2.27	20.26
U.S. East	1,753	2.34	19.26
All visitor markets	3,617	1.63	19.77

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

METHODOLOGY – OVERALL (cont.)

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

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight 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 the third quarter of 2021. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

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

METHODOLOGY – Effect of COVID-19

COVID-19 Travel Restrictions

In December 2019 and January 2020, the initial cases of novel coronavirus (2019-nCoV)-infected pneumonia (NCIP) occurred in Wuhan, Hubei Province, China. Concerns around the virus and related travel restrictions resulted in suspended flights to and from Canada, China, Japan, Korea and Oceania. Flights to Hawai'i from Japan and Canada resumed in November and December 2020, respectively, but they were very limited and resulted in an insufficient number of visitors to sample for the VSAT study. Visitors from those and other international visitor markets did not participate in the VSAT survey for the third quarter of 2021.

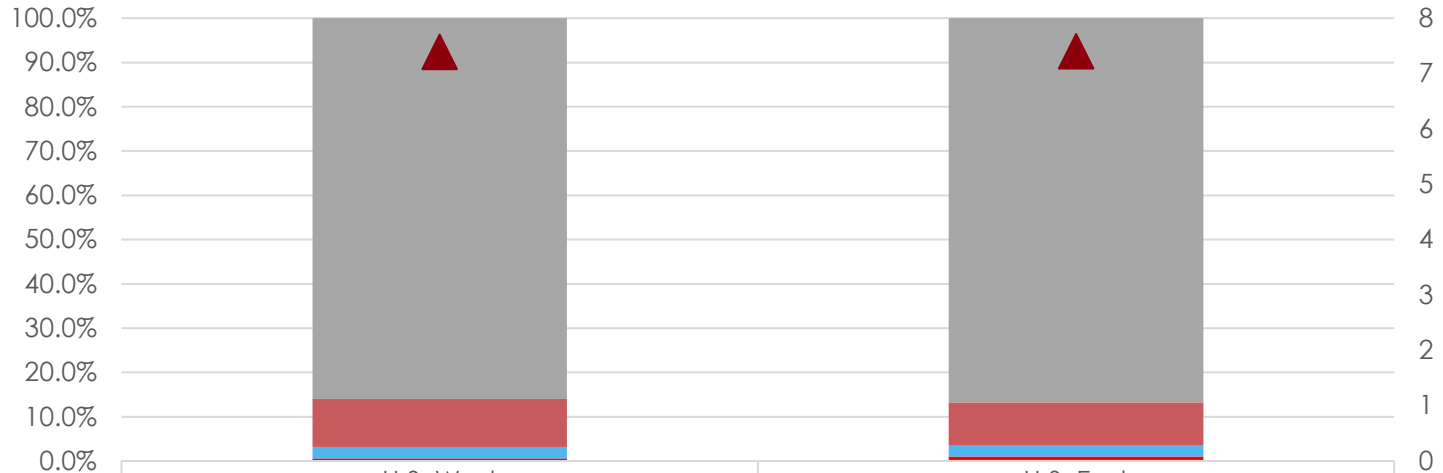
State of Hawai'i Safe Travels Program

On March 26, 2020, the State of Hawai'i started requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day self-quarantine. Effective October 15, 2020, visitors and returning residents could avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawai'i. On December 4, the mandatory quarantine period was reduced from 14 days to 10 days.

SECTION 1 – VISITOR SATISFACTION

SATISFACTION – STATE OF HAWAI'I BY VISITOR MARKET

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



	U.S. West	U.S. East
■ Excellent (7-8)	86.0%	86.9%
■ Above Avg (5-6)	10.8%	9.6%
■ Below Avg (3-4)	2.6%	2.6%
■ Poor (1-2)	0.6%	1.0%
BASE	1,753	1,864
▲ MEAN	7.39	7.40

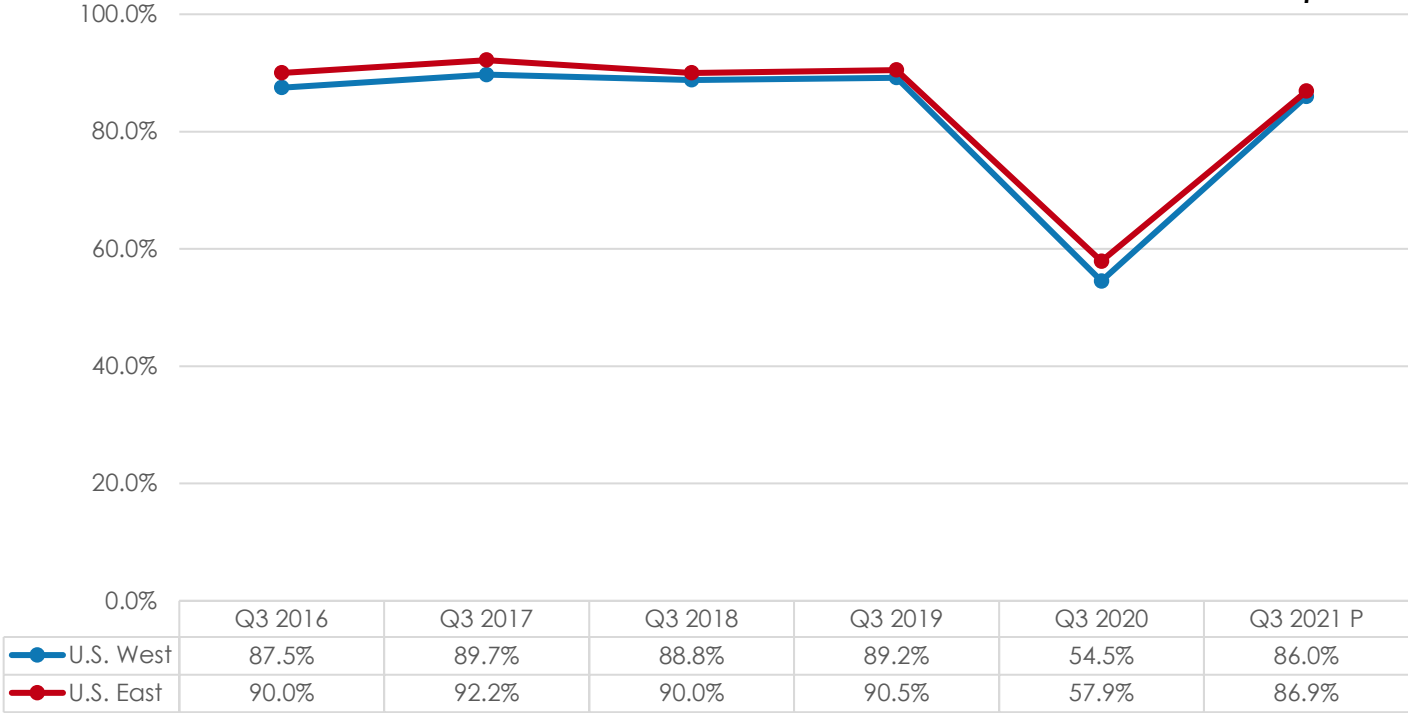
SATISFACTION – STATE OF HAWAI'I BY VISITOR MARKET

- **Visits to the state:** Overall satisfaction with Hawai'i was higher amongst first-time visitors from both U.S. West and U.S. East.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than male visitors.
- **Household income:** Overall satisfaction was highest in both U.S. East and U.S. West amongst less affluent visitors and declined as household income increases.
- **Islands visited:** U.S East visitors who traveled to multiple islands during their stay gave higher overall satisfaction scores compared to those from this market whose trip consisted of visiting just a single island.

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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

Top Box satisfaction scores have rebounded to pre-pandemic levels.

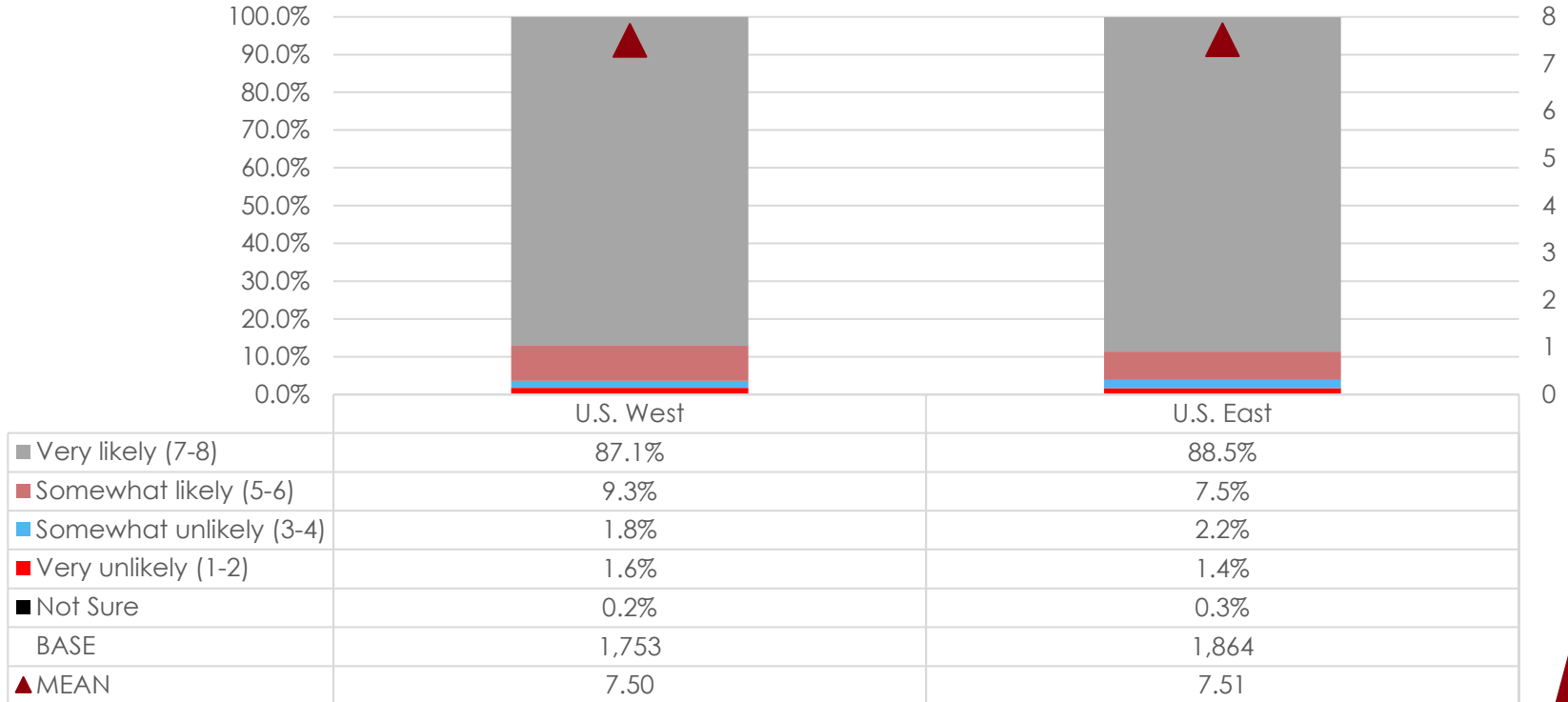


P= Preliminary Data



BRAND/DESTINATION – ADVOCACY

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



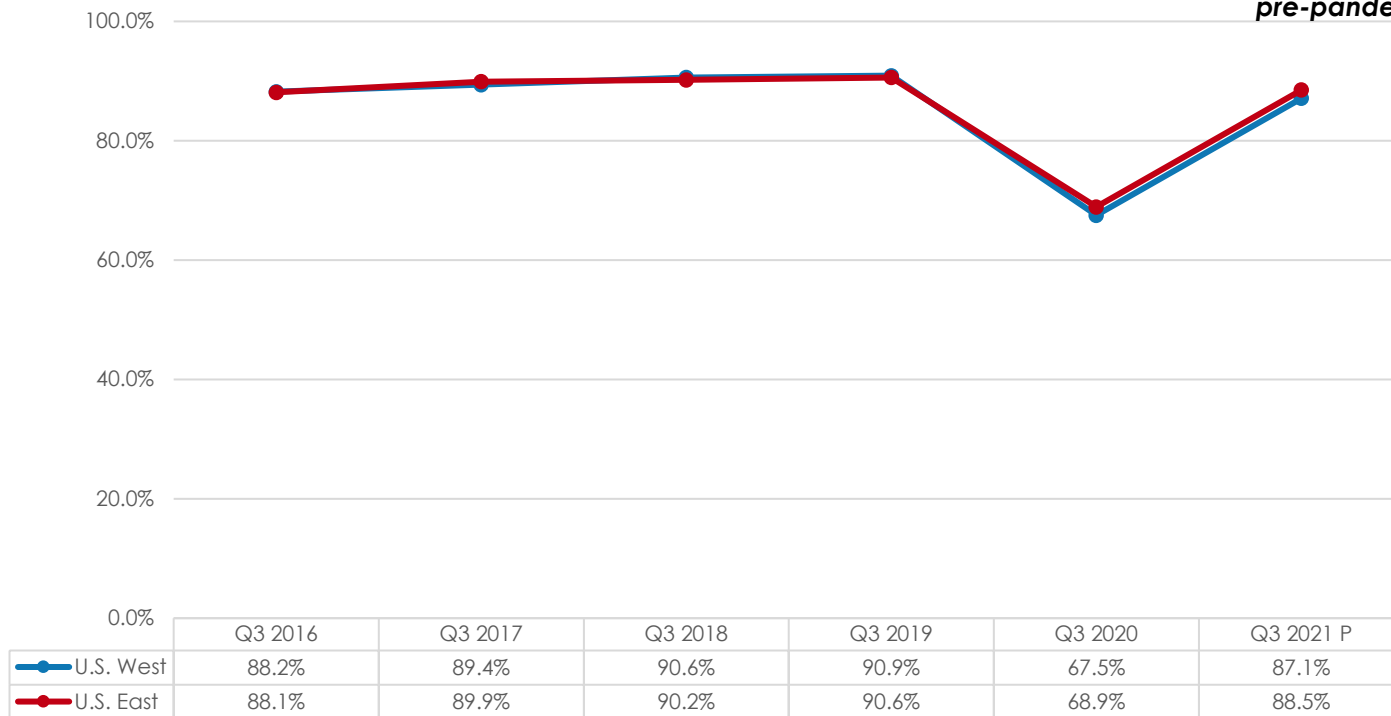
BRAND/DESTINATION – ADVOCACY

- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to male visitors.
- **Islands visited:** Visitors from U.S. East whose trip consisted of visiting multiple islands show stronger brand advocacy than visitors from this market whose trip included a visit to just one island.

BRAND/DESTINATION – ADVOCACY

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

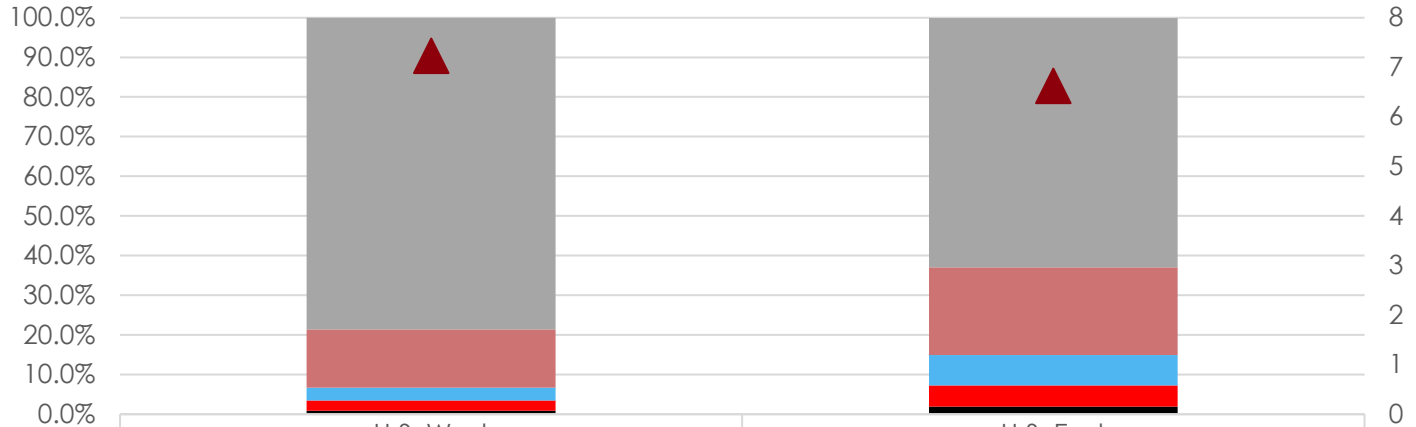
Brand advocacy Top Box scores have rebounded to pre-pandemic levels.



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



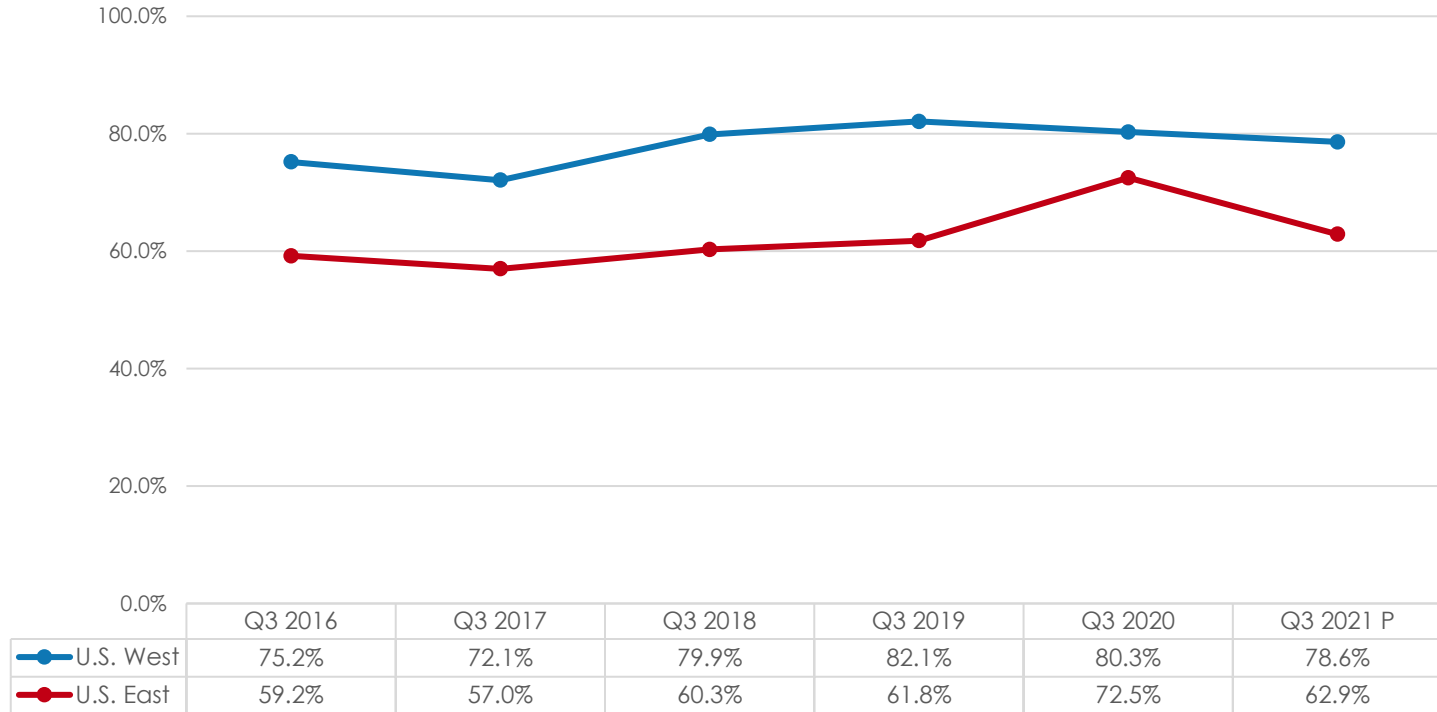
	U.S. West	U.S. East
■ Very likely (7-8)	78.6%	62.9%
■ Somewhat likely (5-6)	14.7%	22.1%
■ Somewhat unlikely (3-4)	3.2%	7.6%
■ Very unlikely (1-2)	2.6%	5.4%
■ Not Sure	0.9%	1.9%
BASE	1,753	1,864
▲ MEAN	7.23	6.62

LIKELIHOOD OF RETURN VISIT

- **Repeat vs First-time:** Repeat visitors from both U.S. markets expressed a stronger likelihood of returning to the islands in the next five years compared to first-time visitors.
- **Travel agent:** Visitors from U.S. East who did not use a travel agent expressed a greater likelihood to return to the state compared to those from this market who used a travel agent.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q3 2020	Q3 2021 P
55.0% COVID-19	34.2% Want to go to someplace new
25.0% Unfriendly people/ Felt unwelcome	28.0% Too expensive
20.5% Too expensive	28.0% Too crowded/ congested/ traffic
15.0% Poor value	23.2% Poor value
11.0% Poor service	13.8% No reason to return/ nothing new
11.0% Too commercialized/ overdeveloped	12.7% Too commercialized/ overdeveloped
	12.1% COVID-19
	11.9% Unfriendly people/ Felt unwelcome
	11.4% Five years is too soon
	10.8% Poor service

P= Preliminary Data

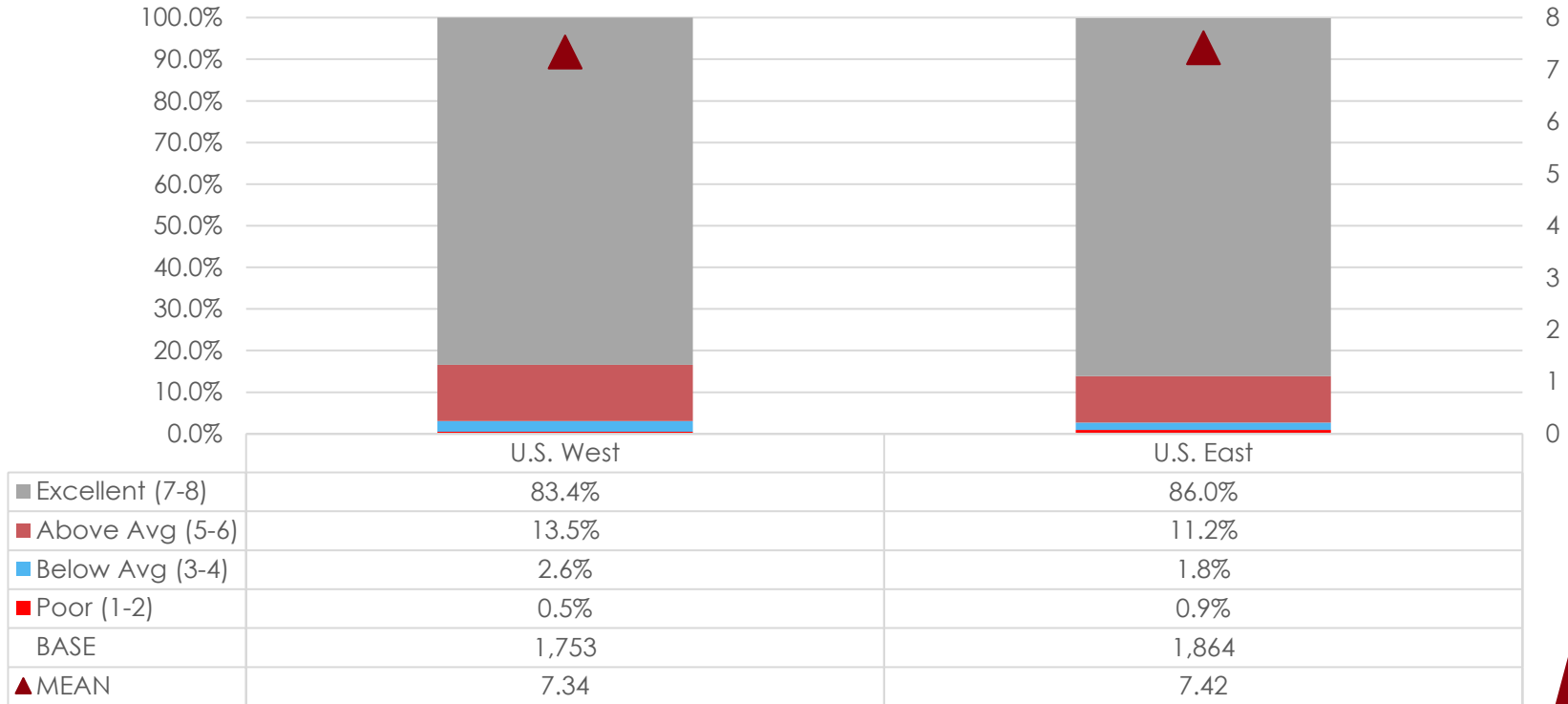
UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q3 2020	Q3 2021 P
42.2% COVID-19	44.1% Too expensive
30.0% Too expensive	36.9% Want to go someplace new
19.2% Unfriendly people/ felt unwelcome	31.5% Flight is too long
18.0% Poor service	18.6% Poor value
16.8% Poor value	18.3% Too crowded/ congested/ traffic
16.8% No compelling reason/ nothing new	16.8% Five years is too soon
15.6% Want to go someplace new	11.8% Other financial obligations
15.6% Flight too long	10.8% Poor service
10.8% Too crowded/ congested/ traffic	10.4% COVID-19

P= Preliminary Data

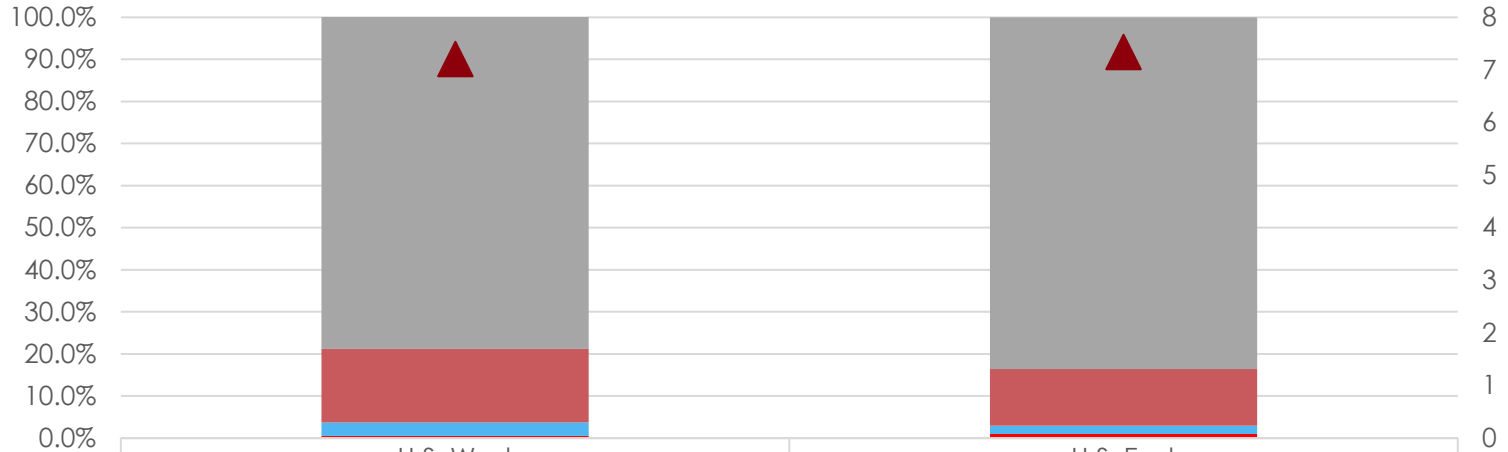
OFFERING A VARIETY OF EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

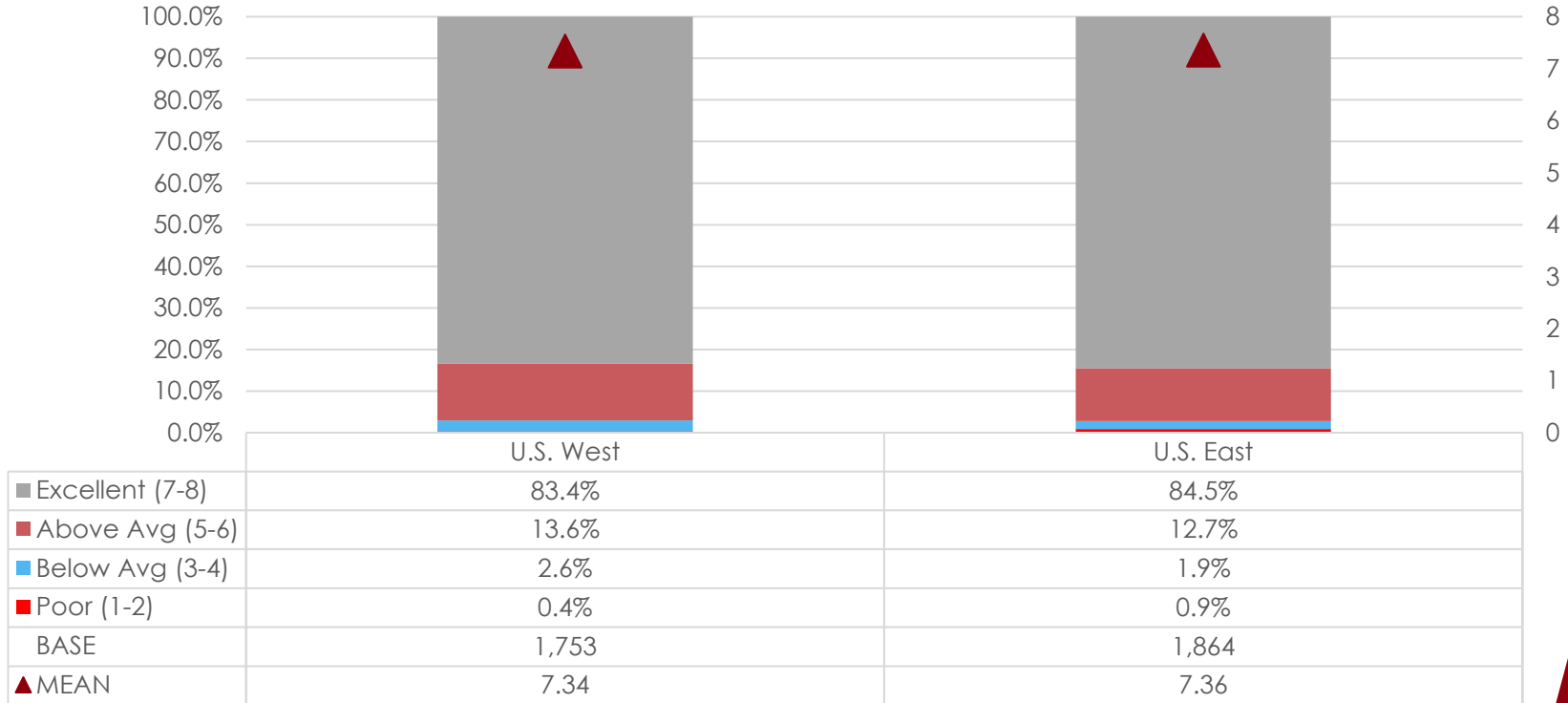
8-pt Rating Scale
8=Excellent / 1=Poor



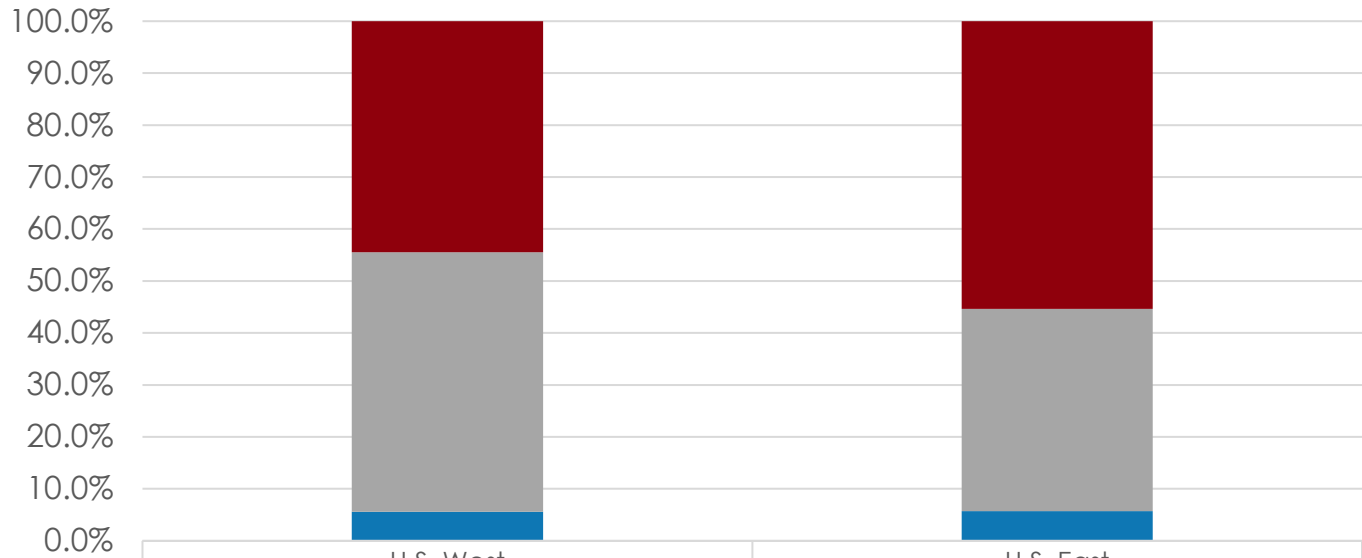
	U.S. West	U.S. East
■ Excellent (7-8)	78.9%	83.6%
■ Above Avg (5-6)	17.5%	13.4%
■ Below Avg (3-4)	3.2%	2.0%
■ Poor (1-2)	0.5%	1.0%
BASE	1,753	1,864
▲ MEAN	7.21	7.34

BEING A SAFE AND SECURE DESTINATION

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



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East
■ Exceeded expectations	44.5%	55.4%
■ Met expectations	49.9%	38.9%
■ Did NOT meet expectations	5.6%	5.7%
BASE	1,753	1,864

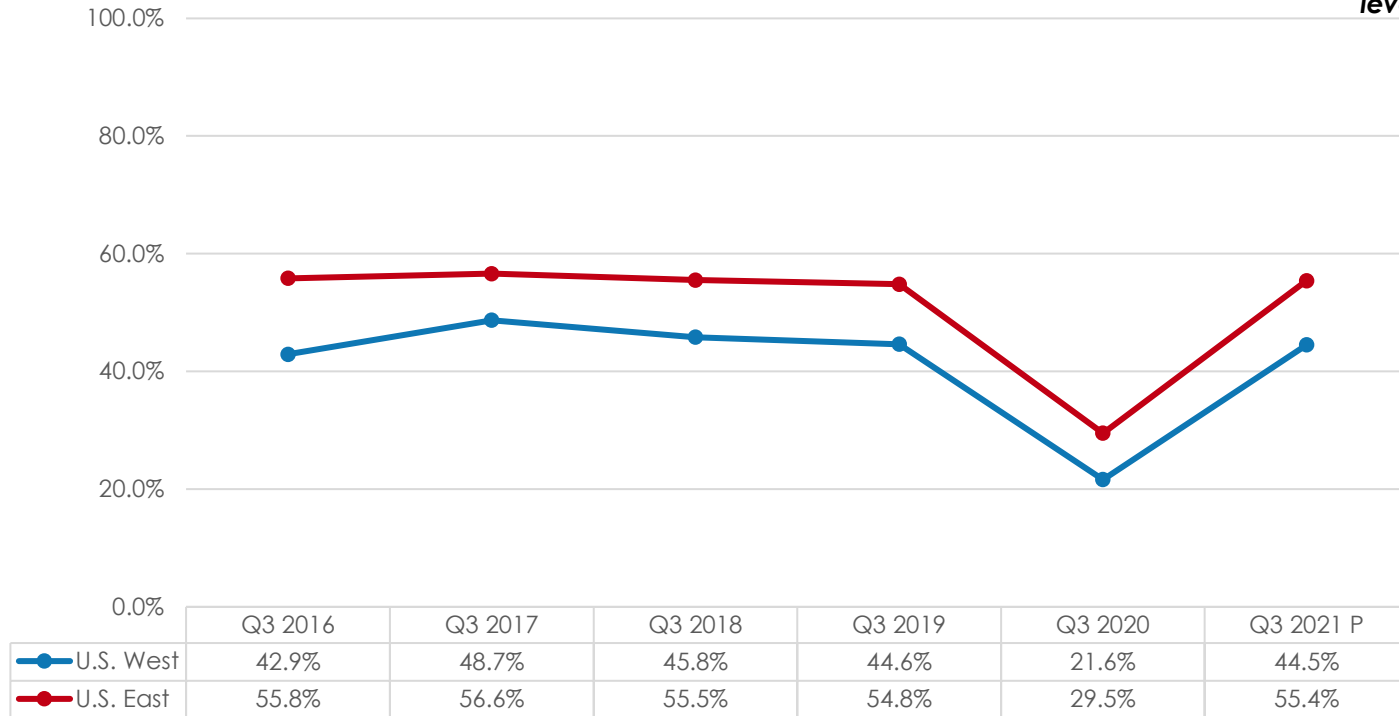
SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Trips to HI:** First-time visitors were more likely to feel their trip exceeded their expectations compared to repeat visitors from both U.S. East and U.S. West.
- **Age:** Among travelers from U.S. West and U.S. East, younger visitors felt more positively about their trip. Ratings declined incrementally eventually bottoming out among senior travelers.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to feel positively about their trip in terms of their expectations compared to male visitors.
- **Islands visited:** Among U.S. East visitors, those who visited multiple islands felt more positively about their trip in terms of expectations than those who visited a single island.
- **Travel party size:** Visitors from U.S. West in smaller travel parties were more likely to feel their trip exceeded their expectations.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”

Trip expectation scores have rebounded to pre-pandemic levels.



P= Preliminary Data

SECTION 2 – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
TOTAL	95.5%	96.4%
On own (self-guided)	82.9%	81.6%
Helicopter/ airplane	3.2%	7.5%
Boat/ submarine/ whale	28.9%	34.3%
Visit towns/communities	50.6%	52.6%
Limo/ van/ bus tour	7.4%	15.8%
Scenic views/ natural landmark	61.8%	69.7%
Movie/ TV/ film location	4.3%	6.2%

ACTIVITIES – RECREATION

	U.S. West	U.S. East
TOTAL	98.1%	98.3%
Beach/ sunbathing	89.5%	90.4%
Bodyboarding	13.6%	8.9%
Standup paddle board	6.6%	6.4%
Surfing	7.9%	9.3%
Canoeing/ kayak	9.4%	9.5%
Swim in the ocean	74.3%	73.8%
Snorkeling	54.8%	52.5%
Freediving	1.7%	1.6%
Windsurf/ Kitesurf	0.2%	0.1%
Jet ski/ Parasail	2.5%	3.5%
Scuba diving	2.6%	3.1%
Fishing	3.1%	3.2%
Golf	6.5%	7.9%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
TOTAL	98.1%	98.3%
Run/ Jog/ Fitness walk	29.2%	29.6%
Spa	8.9%	10.8%
Hiking	48.0%	56.9%
Backpack/ camp	1.6%	1.6%
Agritourism	10.6%	13.5%
Sport event/ tournament	0.3%	0.6%
Park/ botanical garden	37.2%	41.9%
Waterpark	2.0%	1.5%
Mountain tube/ waterfall rappel	2.1%	2.3%
Zip-lining	5.0%	5.7%
Skydiving	0.4%	0.7%
All terrain vehicle (ATV)	3.8%	5.4%
Horseback riding	0.9%	3.4%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.3%	98.9%
Lunch/ sunset/ dinner/ evening cruise	24.3%	28.8%
Live music/ stage show	22.9%	29.8%
Nightclub/ dancing/ bar/ karaoke	6.3%	5.8%
Fine dining	53.3%	56.4%
Family restaurant	64.1%	58.8%
Fast food	42.7%	41.1%
Food truck	42.3%	46.2%
Café/ coffee house	50.5%	48.3%
Ethnic dining	26.6%	30.2%
Prepared own meal	50.4%	42.7%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East
TOTAL	97.4%	96.6%
Mall/ department store	41.6%	40.3%
Designer boutique	18.8%	19.0%
Hotel/ resort store	37.0%	41.7%
Swap meet/ flea market	17.3%	15.0%
Discount/ outlet store	13.1%	14.1%
Supermarket	68.5%	61.1%
Farmer's market	32.8%	30.2%
Convenience store	54.8%	55.3%
Duty free store	3.6%	3.4%
Local shop/ artisan	64.0%	65.8%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
TOTAL	64.2%	73.8%
Historic military site	18.9%	27.5%
Historic Hawaiian site	30.1%	37.1%
Other historical site	12.7%	13.8%
Art museums	2.0%	2.5%
Art gallery/ exhibition	8.8%	9.2%
Luau/ Polynesian show/ hula show	24.5%	35.0%
Lesson- ex. ukulele, hula, canoe, lei making	4.7%	5.1%
Play/ concert/ theatre	1.1%	1.1%
Art/ craft fair	7.6%	7.8%
Festival event	2.2%	2.1%

ACTIVITIES – TRANSPORTATION

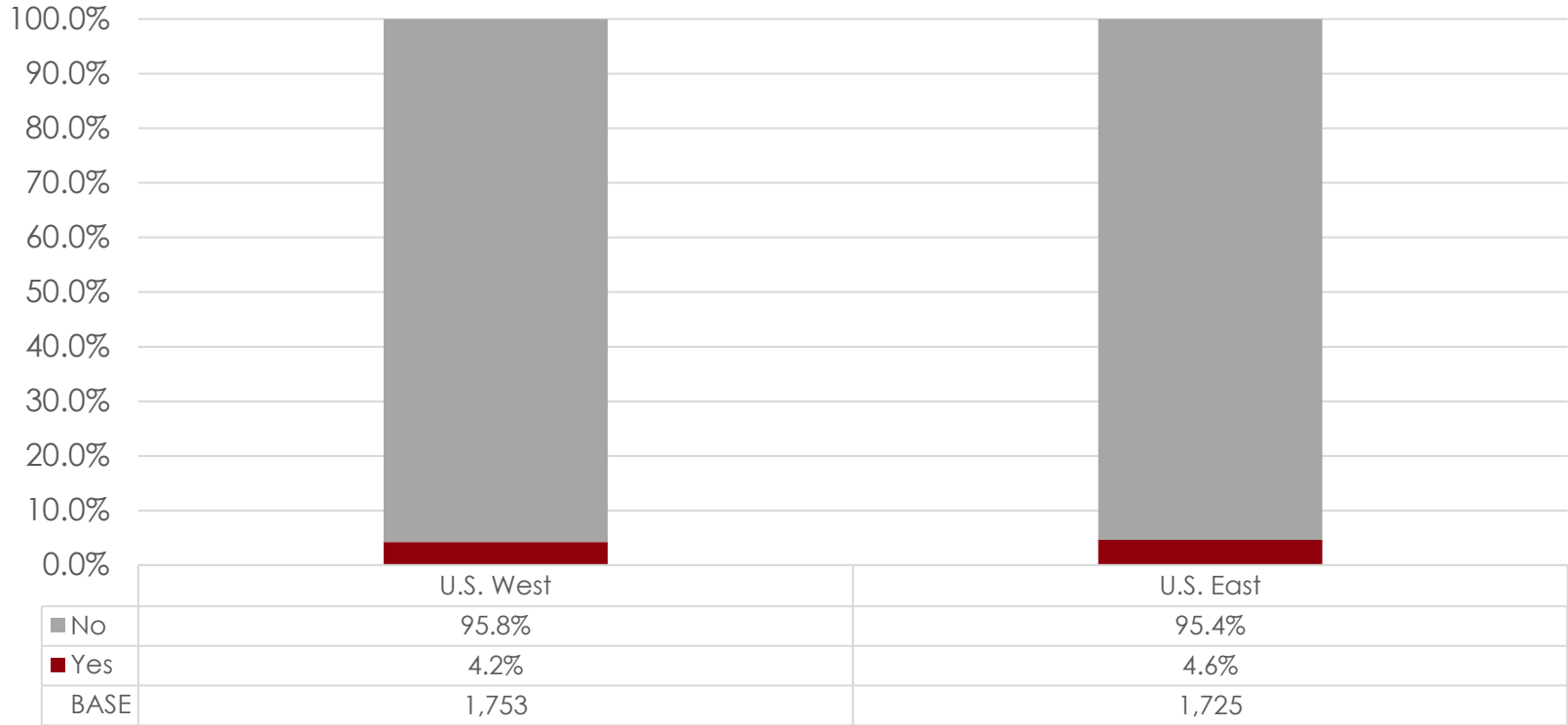
	U.S. West	U.S. East
TOTAL	93.5%	93.4%
Airport shuttle	15.8%	18.4%
Trolley	2.2%	3.4%
Public bus	4.4%	5.5%
Tour bus/ tour van	7.5%	14.9%
Taxi/ limo	10.0%	14.9%
Rental car	77.1%	74.9%
Ride share	18.9%	19.9%
Bicycle rental	2.9%	4.1%

ACTIVITIES – OTHER

	U.S. West	U.S. East
TOTAL	29.3%	24.2%
Visit friends/ family	28.3%	23.2%
Volunteer non-profit	1.4%	1.5%

SECTION 3 – TRAVELERS WITH DISABILITIES

DISABILITY ASSISTANCE

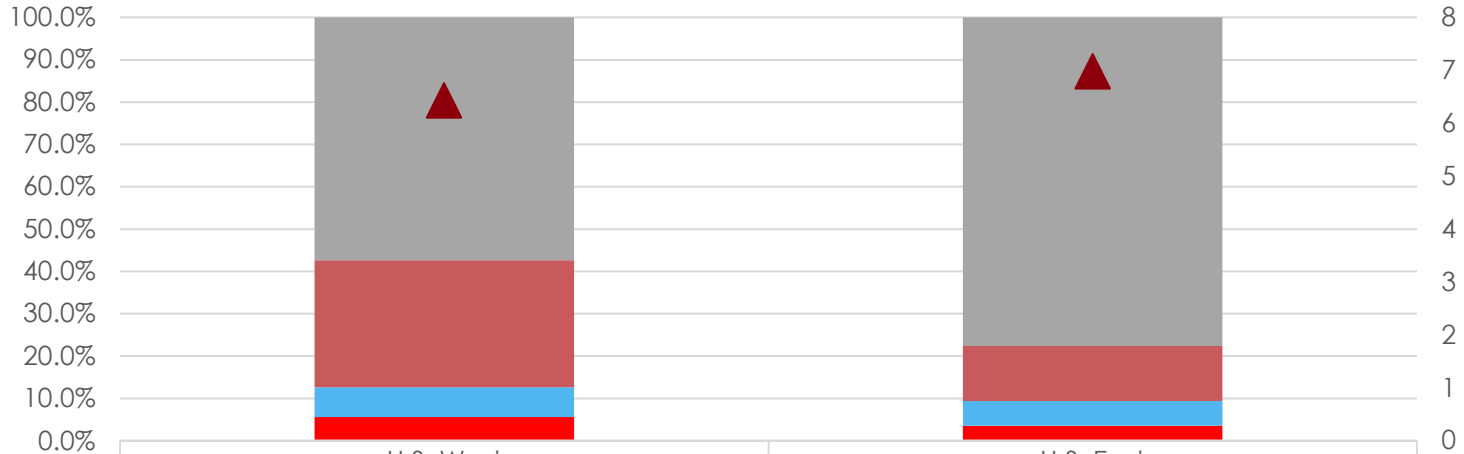


TYPES OF ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane, etc.)	71.4%	80.2%
Personal assistance	23.2%	17.4%
NA- No one needed assistance	2.8%	9.3%
Other	5.4%	3.5%
Orientation and Mobility Assistance	5.2%	1.2%
Ambulance/ Hospital/ Medical visit	2.6%	0.0%
Print material in alternate format	1.5%	1.2%
Lift equipped van	1.3%	0.0%
No help was offered	0.0%	1.2%
BASE	75	86

OVERALL ACCESSIBILITY – AIRPORTS

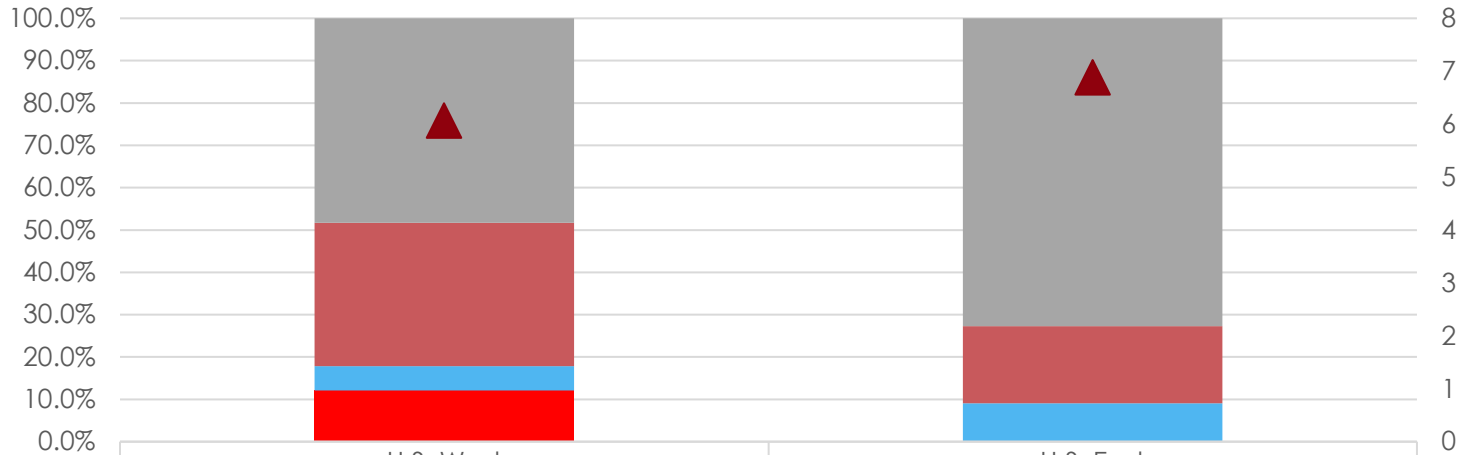
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	57.4%	77.7%
■ Above Avg (5-6)	30.0%	12.9%
■ Below Avg (3-4)	7.0%	5.9%
■ Poor (1-2)	5.6%	3.5%
BASE	72	85
▲ MEAN	6.43	6.98

OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

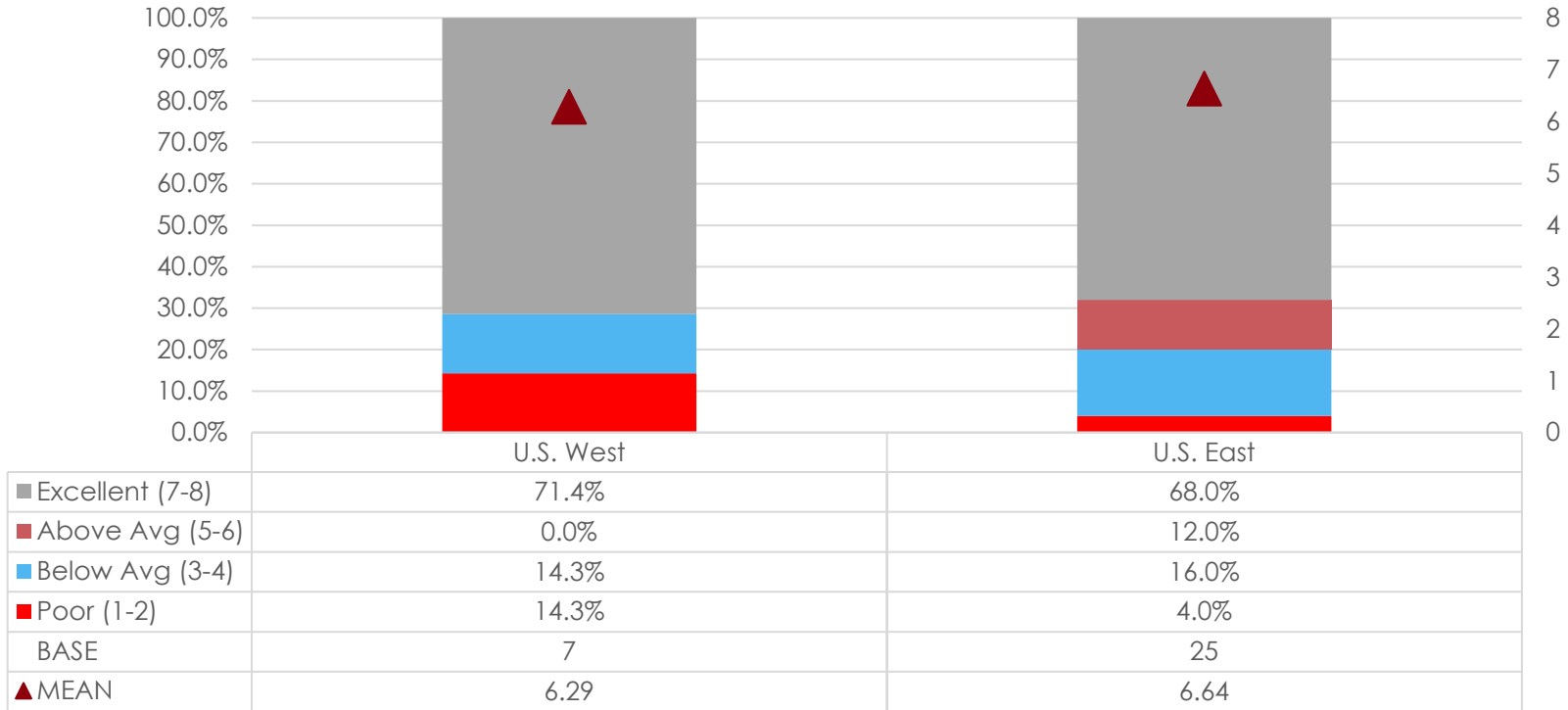
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	48.3%	72.7%
■ Above Avg (5-6)	33.9%	18.2%
■ Below Avg (3-4)	5.8%	9.1%
■ Poor (1-2)	12.1%	0.0%
BASE	33	55
▲ MEAN	6.07	6.89

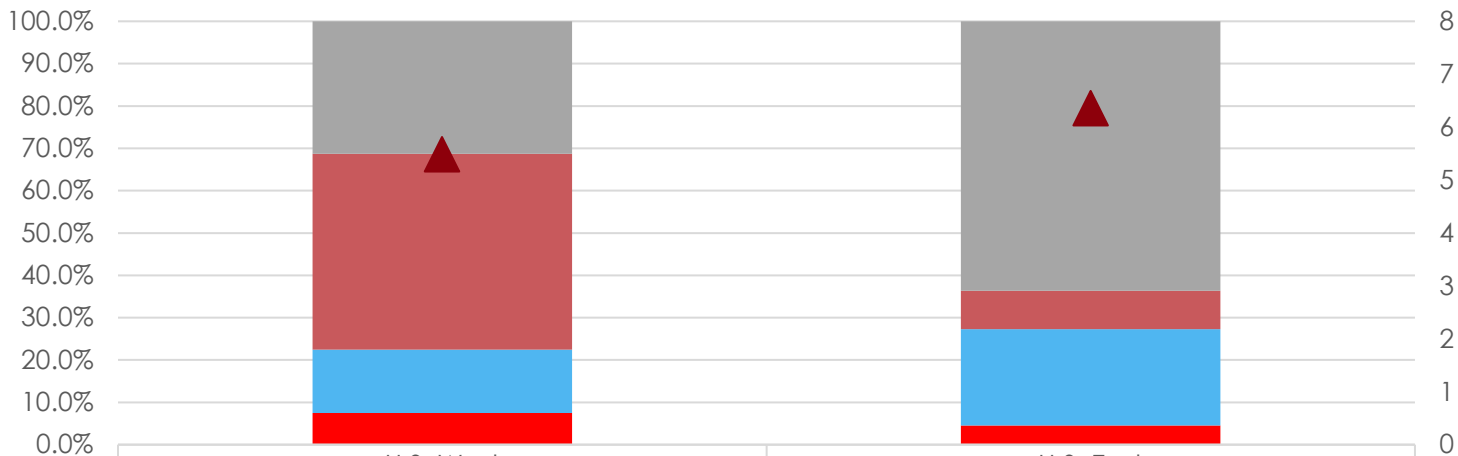
OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



OVERALL ACCESSIBILITY – RIDE SHARE

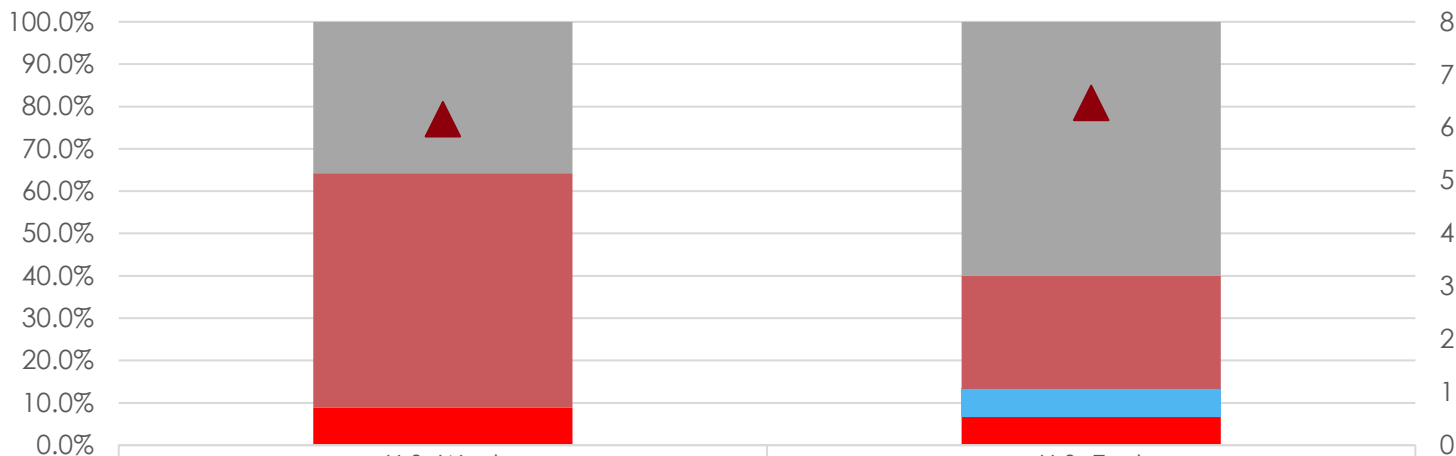
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	31.3%	63.6%
■ Above Avg (5-6)	46.3%	9.1%
■ Below Avg (3-4)	14.9%	22.7%
■ Poor (1-2)	7.5%	4.6%
BASE	13	22
▲ MEAN	5.49	6.36

OVERALL ACCESSIBILITY – DEPT. OF AGRICULTURE ANIMAL QUARANTINE

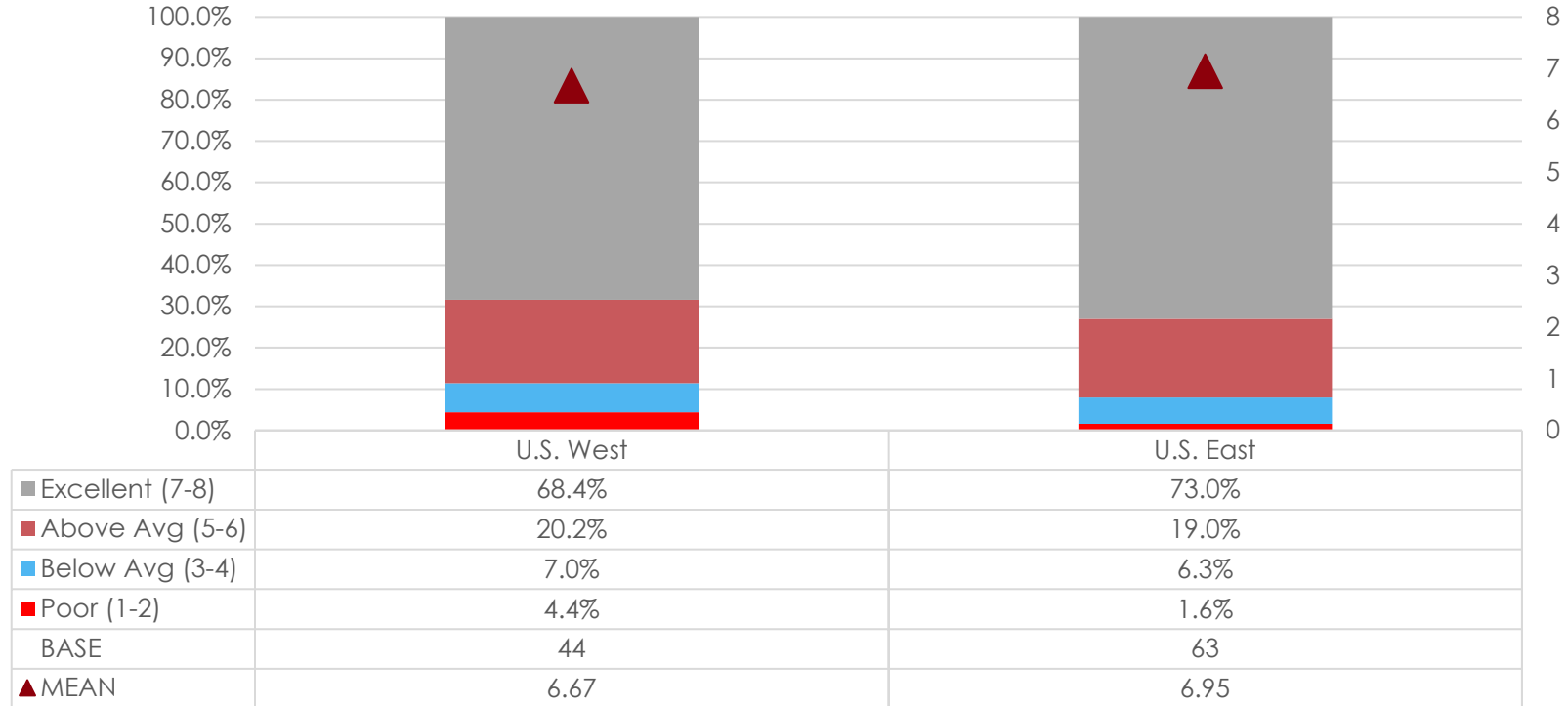
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	35.7%	60.0%
■ Above Avg (5-6)	55.3%	26.7%
■ Below Avg (3-4)	0.0%	6.7%
■ Poor (1-2)	8.9%	6.6%
BASE	11	15
▲ MEAN	6.16	6.47

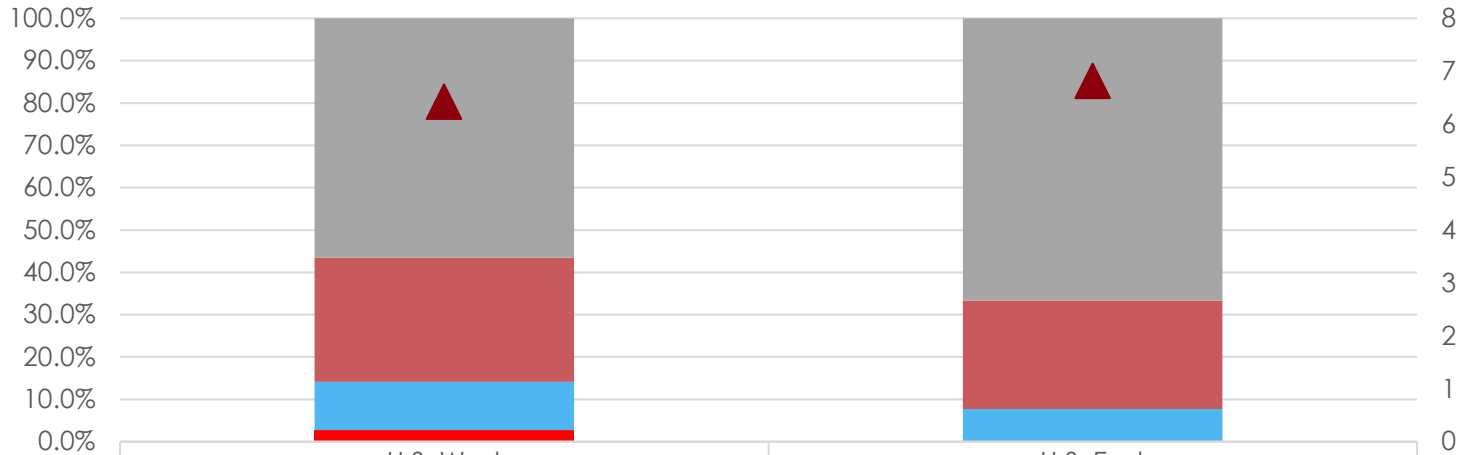
OVERALL ACCESSIBILITY – HOTELS

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



OVERALL ACCESSIBILITY – RESTAURANTS

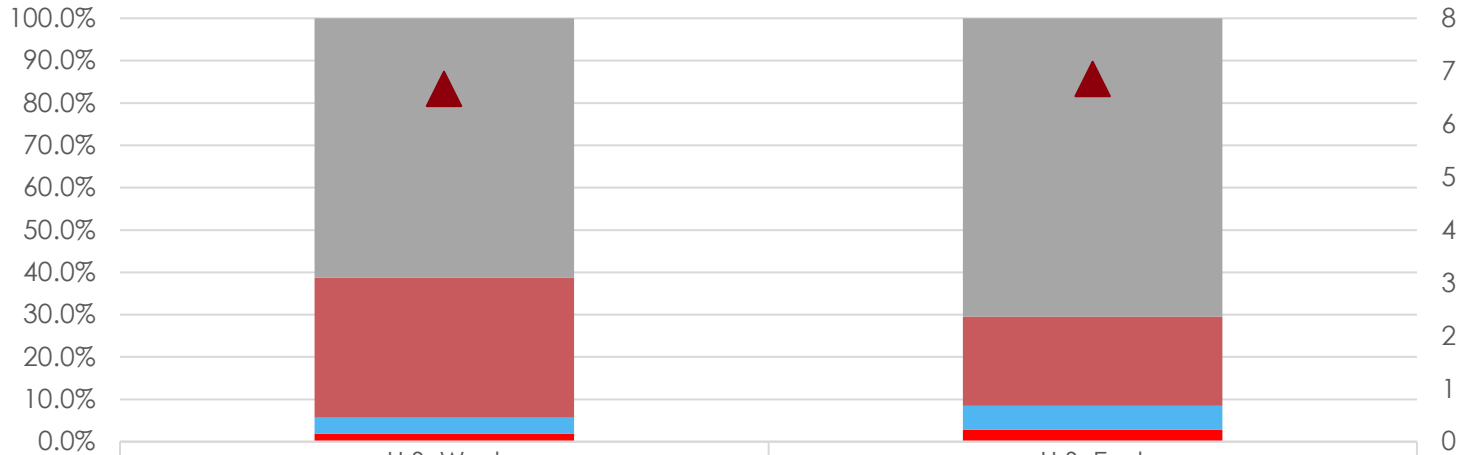
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	56.5%	66.7%
■ Above Avg (5-6)	29.4%	25.6%
■ Below Avg (3-4)	11.4%	7.7%
■ Poor (1-2)	2.7%	0.0%
BASE	71	78
▲ MEAN	6.43	6.82

OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

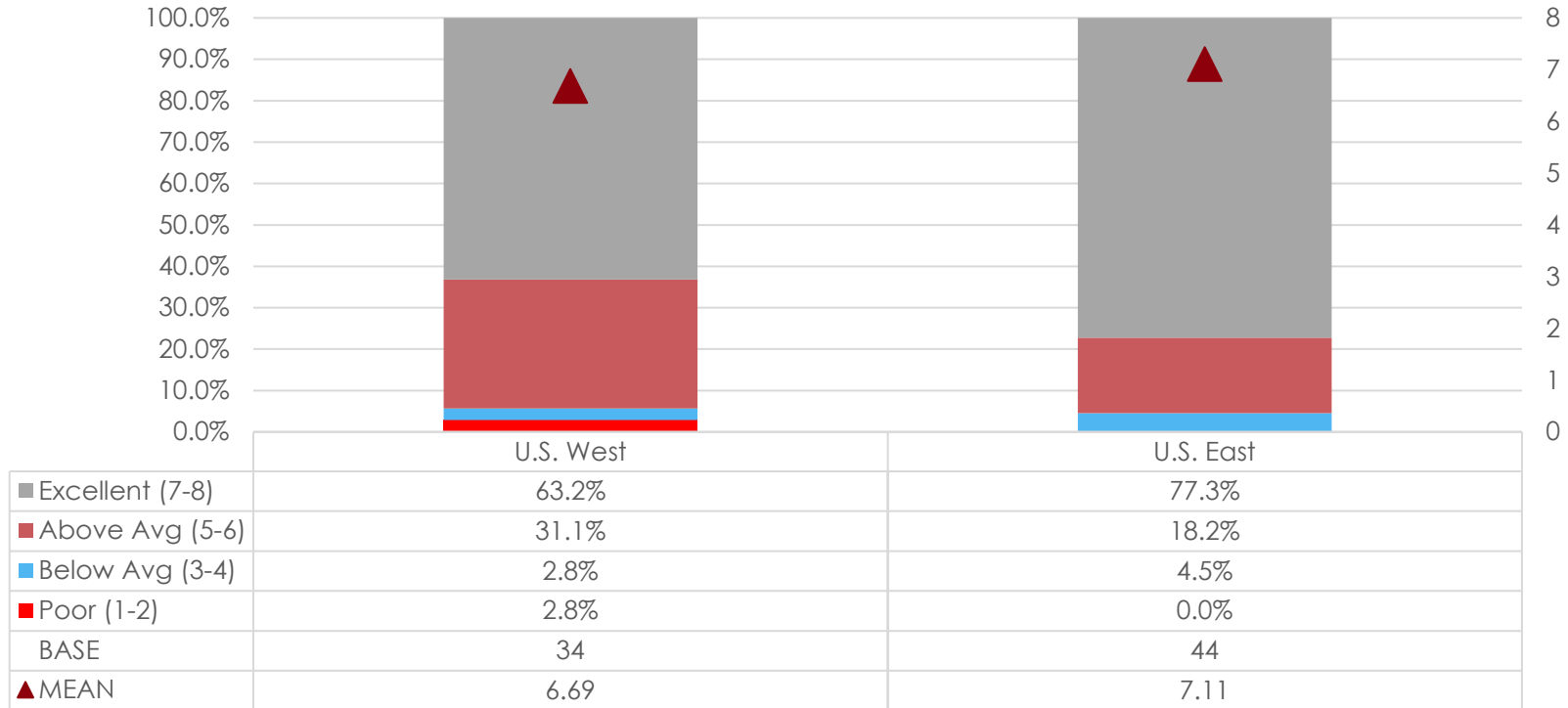
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	61.3%	70.4%
■ Above Avg (5-6)	33.1%	21.1%
■ Below Avg (3-4)	3.8%	5.6%
■ Poor (1-2)	1.9%	2.8%
BASE	51	71
▲ MEAN	6.67	6.86

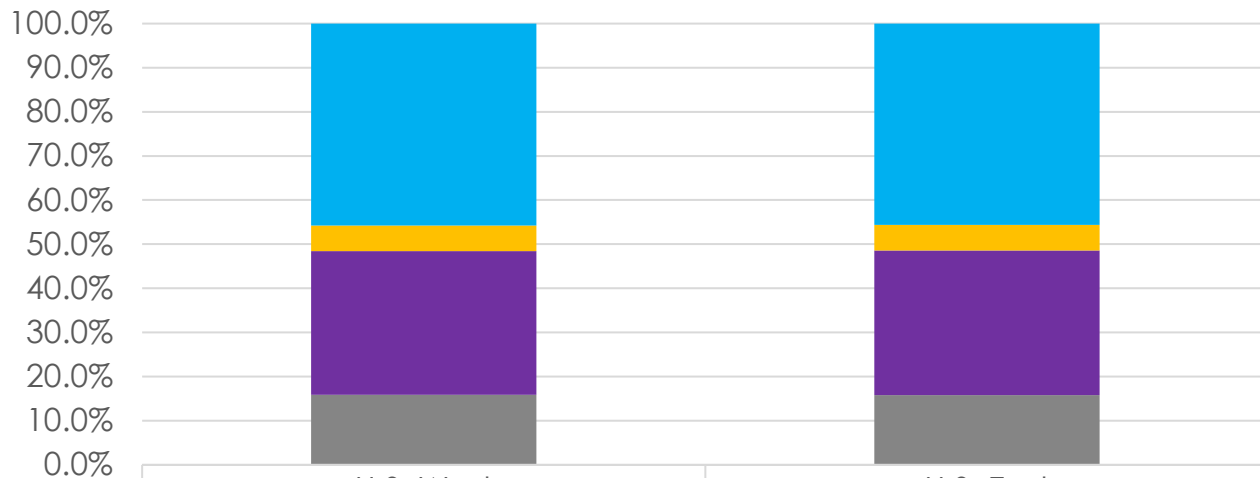
OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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



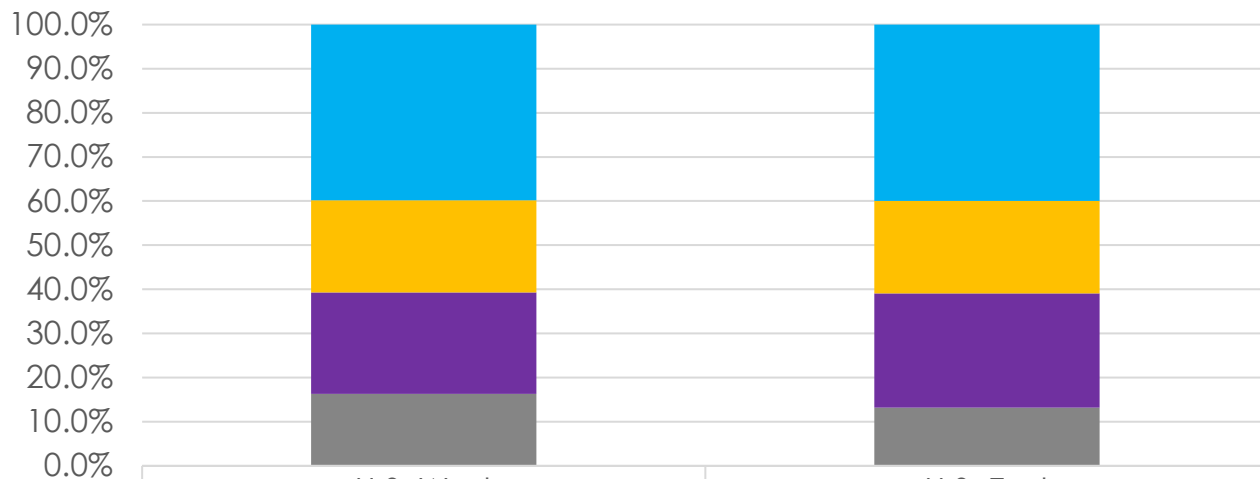
SECTION 4 – ALTERNATIVE MESSAGING

MESSAGING – “SAFE AND RESPONSIBLE TRAVEL”



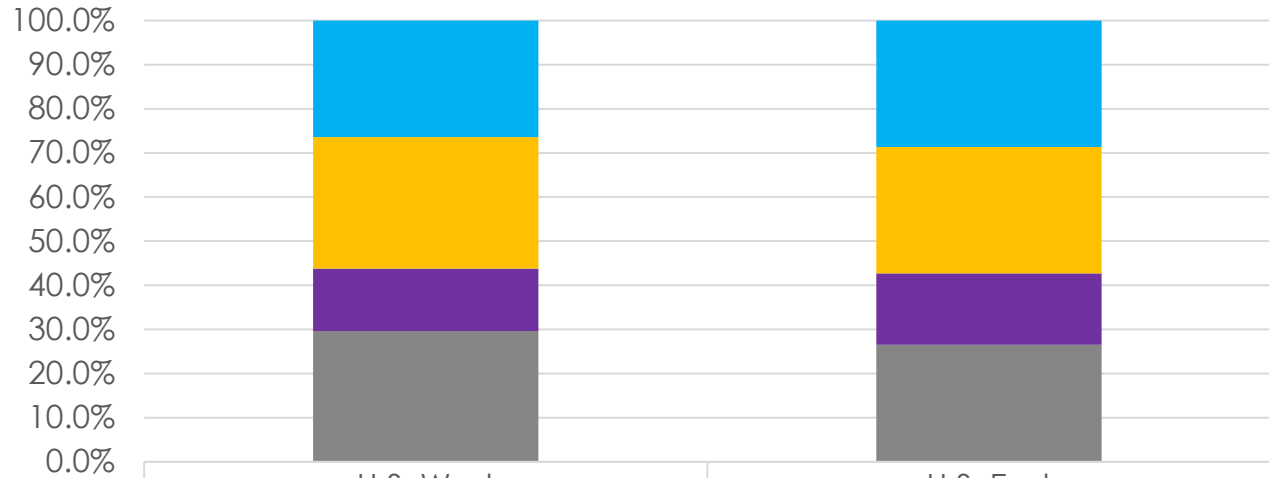
	U.S. West	U.S. East
YES- Pre-arrival/ During trip	45.8%	45.7%
YES- During trip	5.7%	5.7%
YES- Pre-arrival	32.6%	32.8%
NO	15.9%	15.8%
BASE	1753	1864

MESSAGING – “CARING FOR AND RESPECTING HAWAI‘I’S CULTURE, PEOPLE, AND ENVIRONMENT”



	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	39.8%	40.0%
■ YES- During trip	20.9%	21.0%
■ YES- Pre-arrival	23.0%	25.9%
■ NO	16.3%	13.2%
BASE	1753	1864

MESSAGING – “OCEAN AND HIKING SAFETY”

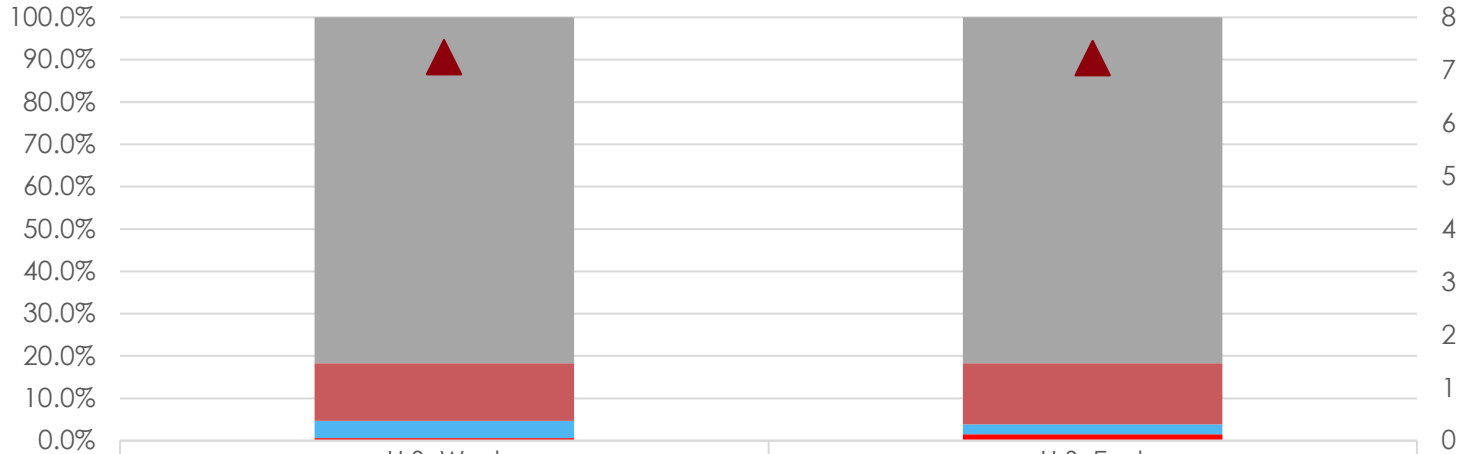


	U.S. West	U.S. East
YES- Pre-arrival/ During trip	26.4%	28.6%
YES- During trip	29.8%	28.6%
YES- Pre-arrival	14.2%	16.1%
NO	29.7%	26.6%
BASE	1753	1864

SECTION 5 – O'AHU

SATISFACTION – O‘AHU

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



	U.S. West	U.S. East
■ Excellent (7-8)	81.7%	81.7%
■ Above Avg (5-6)	13.6%	14.5%
■ Below Avg (3-4)	4.0%	2.4%
■ Poor (1-2)	0.6%	1.5%
BASE	768	1,021
▲ MEAN	7.25	7.23

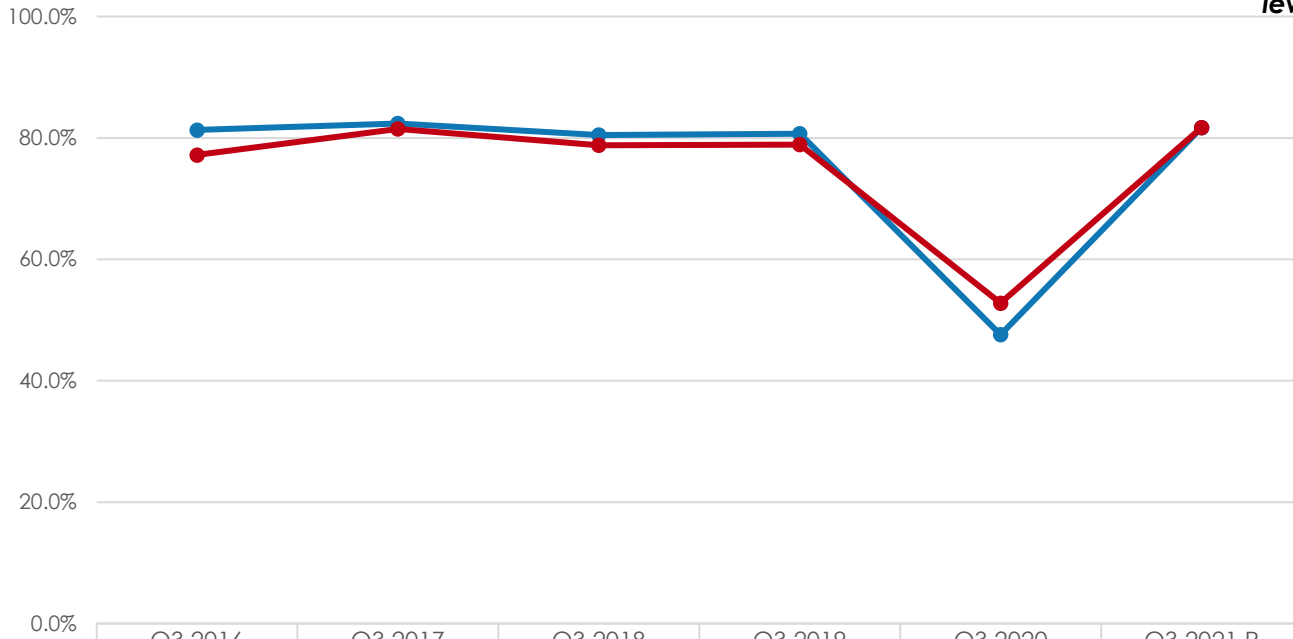
SATISFACTION – O‘AHU

- **Trips to Hawai‘i:** U.S. West visitors who were first time visitors to the state gave higher satisfaction scores compared to repeat visitors.
- **Age:** Younger travelers under the age of 35 from U.S. West were the most satisfied with their stay on O‘ahu. At the opposite end, senior travelers provided the lowest scores.
- **Gender:** Female visitors from both U.S. West and U.S. East were more satisfied with their stay on O‘ahu than males from these visitor markets.
- **Household income:** Travelers from both U.S. West and U.S. East who fall into the bottom income tier were the most satisfied with their stay.
- **O‘ahu Only Visitors:** Visitors from U.S. West and U.S. East whose trip consisted of visiting just O‘ahu were more satisfied with their stay on island, compared to those who also visited at least one Neighbor Island.

SATISFACTION – O‘AHU

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

Top Box scores have rebounded to pre-pandemic levels.

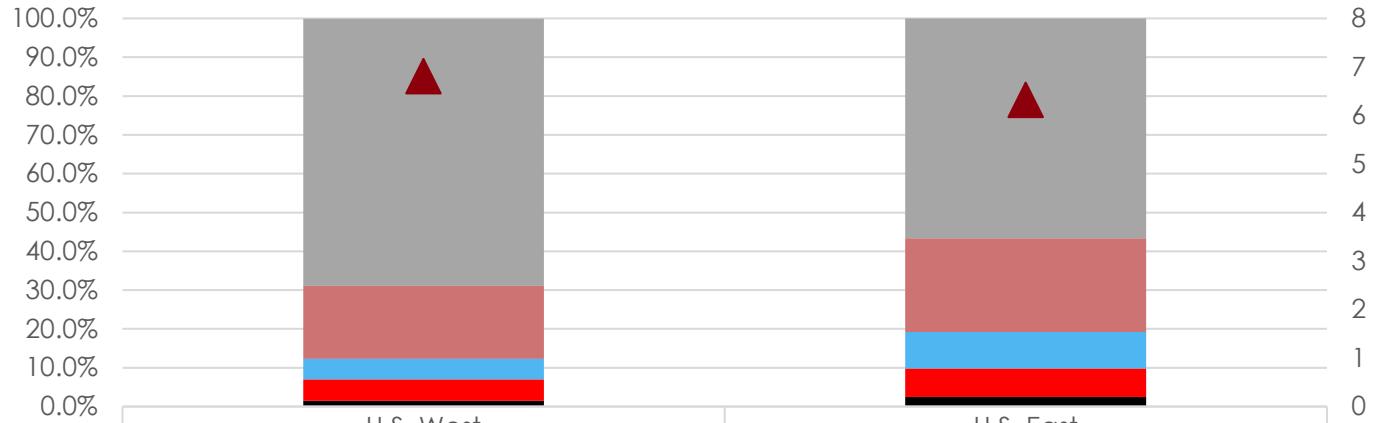


	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	81.3%	82.4%	80.5%	80.7%	47.6%	81.7%
U.S. East	77.2%	81.5%	78.8%	78.9%	52.8%	81.7%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

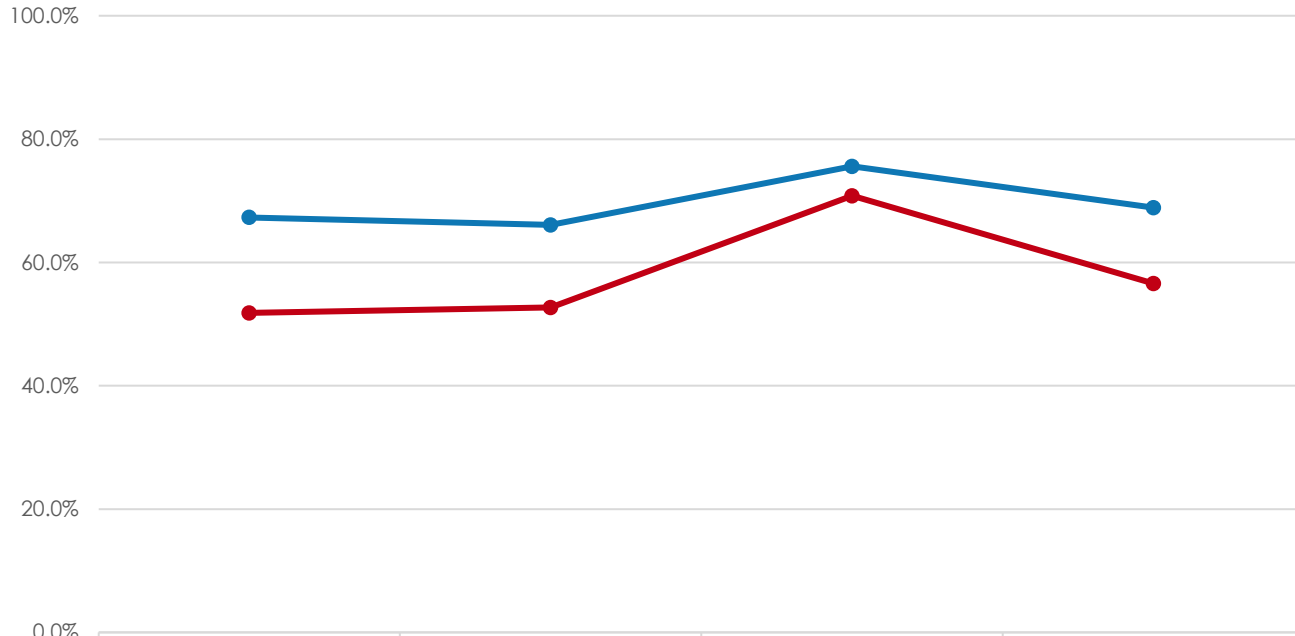
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	68.9%	56.6%
Somewhat likely (5-6)	18.8%	24.1%
Somewhat unlikely (3-4)	5.3%	9.4%
Very unlikely (1-2)	5.5%	7.3%
Not sure	1.5%	2.5%
BASE	722	874
▲ MEAN	6.81	6.32

LIKELIHOOD OF RETURN VISIT – O‘AHU

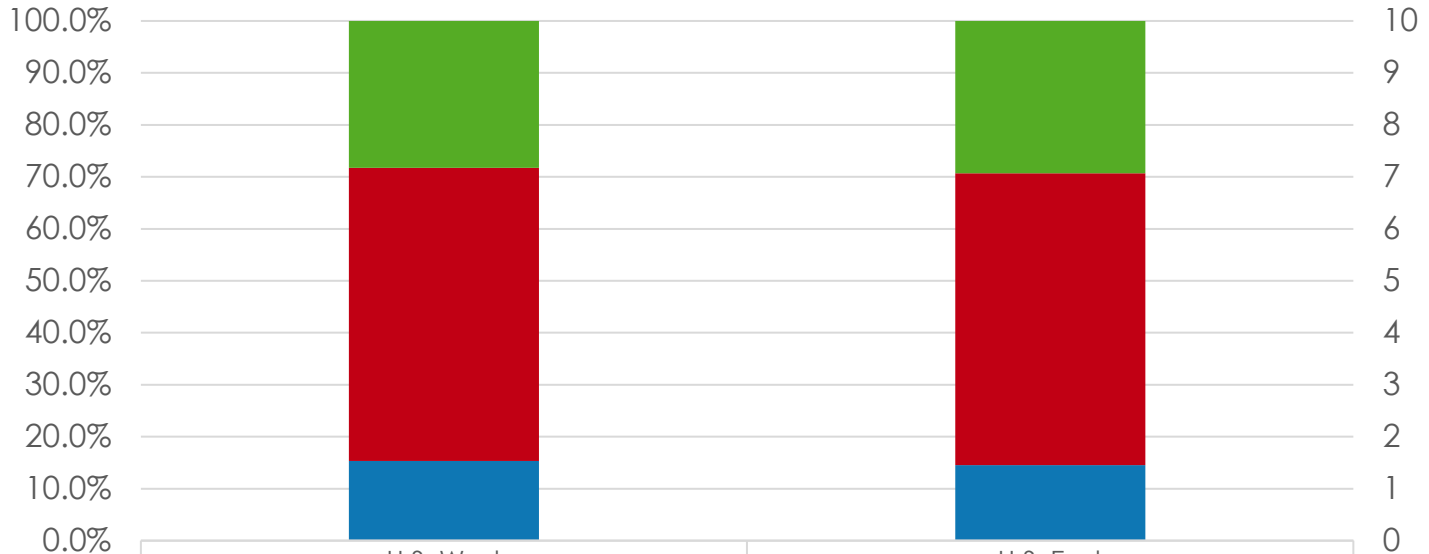
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	67.3%	66.1%	75.6%	68.9%
U.S. East	51.8%	52.7%	70.8%	56.6%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
■ Aided Ad Awareness	28.3%	29.3%
■ No Prior Awareness	56.4%	56.2%
■ Unsure	15.3%	14.5%
BASE	722	874

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
Atlantis Submarine & Cruises	4.4%	4.1%
Bernice P. Bishop Museum	3.4%	4.1%
Byodo-In Temple	13.6%	13.6%
Chinatown & Honolulu Art District	12.2%	12.1%
Diamond Head State Monument	32.6%	39.2%
Dole Plantation	37.9%	36.4%
Haleiwa	28.6%	27.0%
Hanauma Bay Nature Reserve	15.1%	13.3%
Harold L. Lyon Arboretum	1.4%	0.8%
Hawai‘i State Art Museum	1.0%	1.4%
Honolulu Museum of Art	1.8%	2.3%
Hawaiian Mission Houses, Historic Site and Archive	1.0%	1.1%
Hawai‘i’s Plantation Village	2.0%	2.2%
Honolulu Zoo	7.0%	8.0%

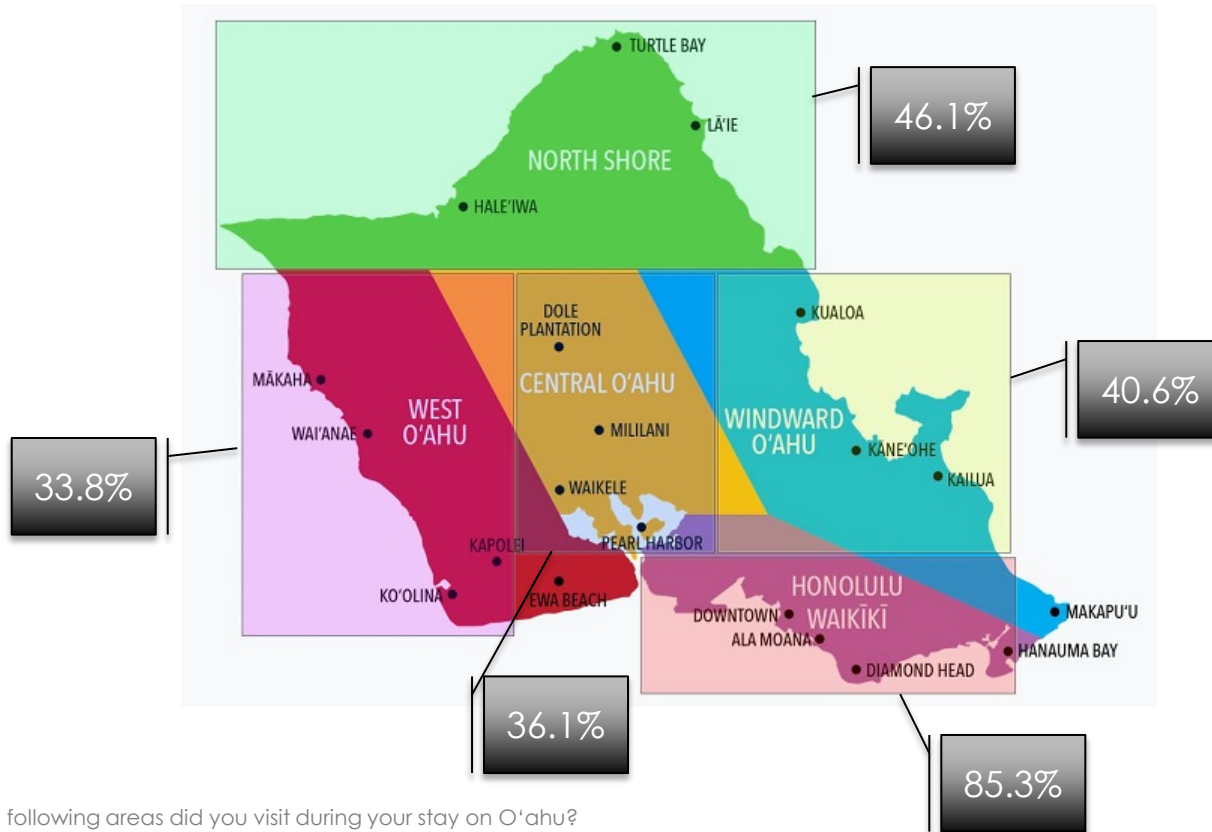
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
Ho‘omaluhia Botanical Garden	9.3%	9.1%
Iolani Palace State Monument	4.4%	7.8%
Kaiwi State Scenic Shoreline/ Makapu‘u Trail	6.2%	8.6%
Kakaako Street Art	2.2%	1.5%
Koko Head Crater Trail	5.5%	8.6%
Kualoa Private Nature Reserve	16.3%	15.9%
Lanikai or Kailua Beach	32.3%	31.6%
Manoa Falls & Trail	15.6%	16.7%
National Memorial Cemetery of the Pacific	7.7%	11.9%
Nuuanu Pali Lookout	13.8%	14.9%
North Shore Beaches	51.3%	53.1%

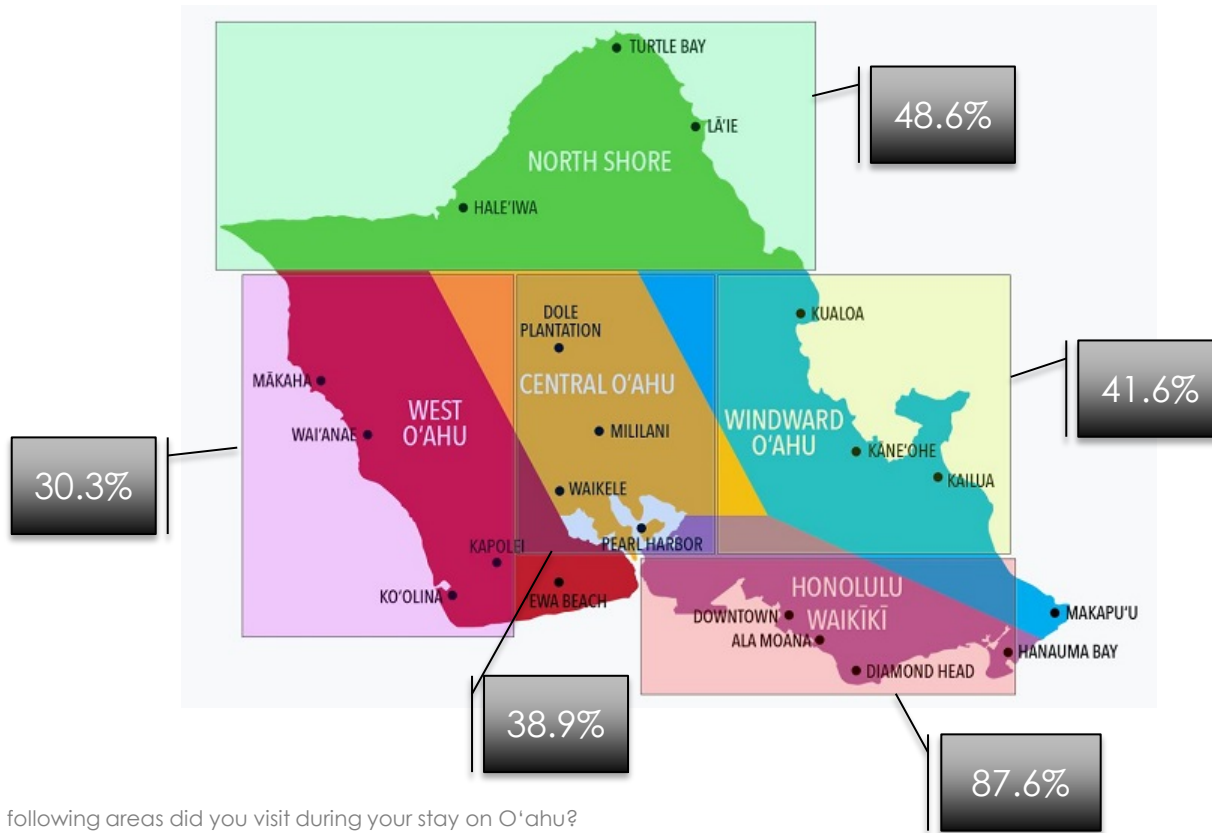
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
Pearl Harbor	34.8%	47.9%
Polynesian Cultural Center	17.1%	15.6%
Queen Emma’s Summer Palace	1.4%	2.2%
Sea Life Park Hawai‘i	3.9%	4.1%
Waikiki Aquarium	5.0%	5.1%
Waimanalo Beach Park	15.1%	14.6%
Waimea Valley	25.0%	24.1%

AREAS VISITED U.S. WEST

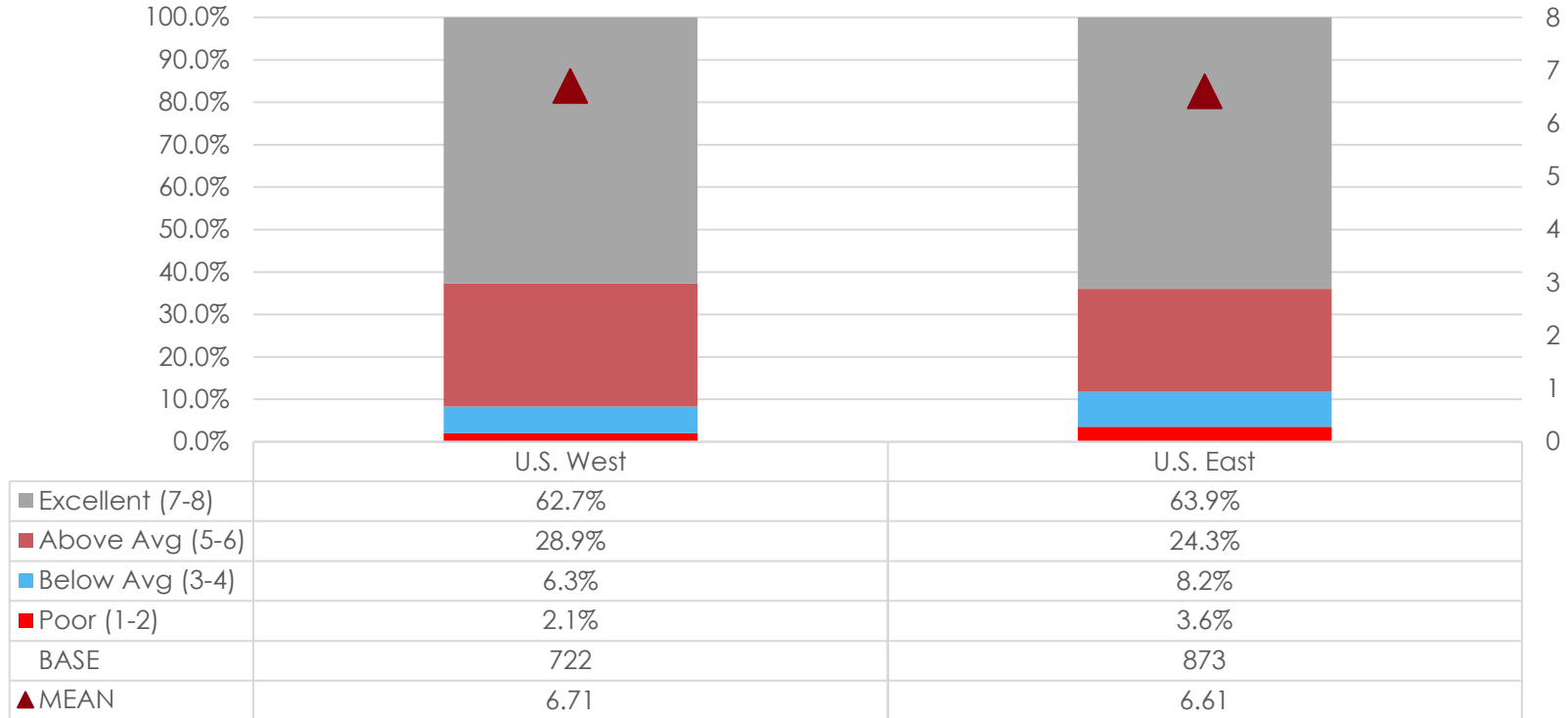


AREAS VISITED U.S. EAST

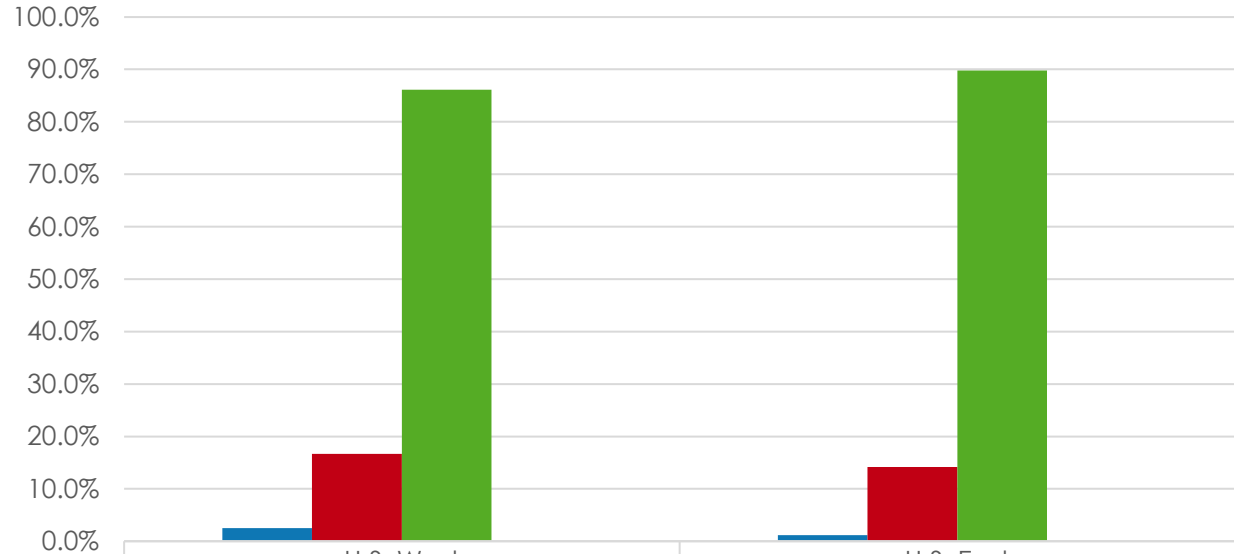


SATISFACTION – Daniel K. Inouye International Airport

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



SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ Neither of these	2.5%	1.2%
■ Full-face snorkel mask	16.7%	14.2%
■ 2-Piece, separate mask & snorkel	86.1%	89.8%
BASE	308	332

SNORKELING OCEAN SAFETY – O‘AHU

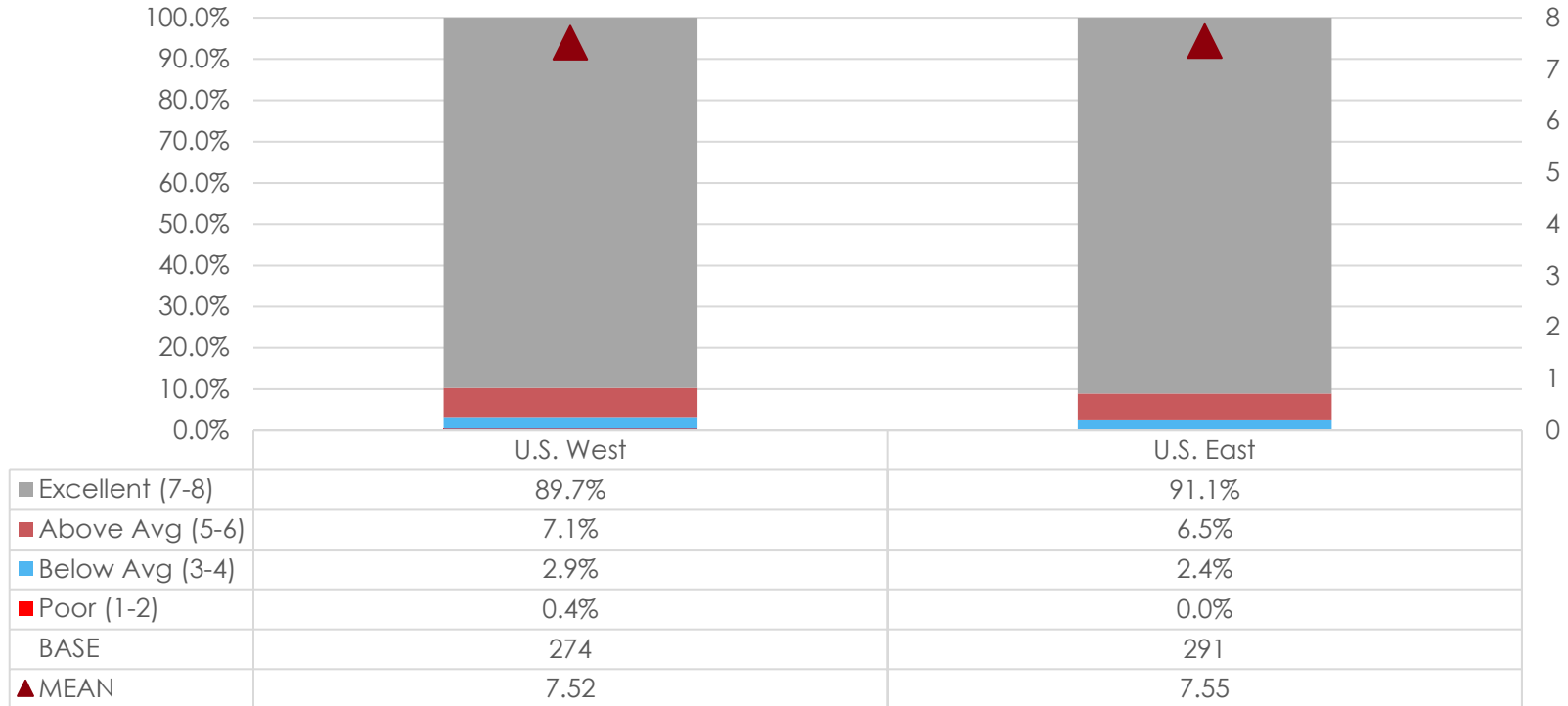
	U.S. West	U.S. East
Did not have to be assisted or rescued	98.6%	97.9%
Yes, needed assistance – using 2-piece mask & snorkel	1.4%	1.8%
Yes, while snorkeling using a full-face mask	0.0%	0.3%
BASE	300	328



SECTION 6 – KAUA‘I

SATISFACTION – KAUA‘I

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

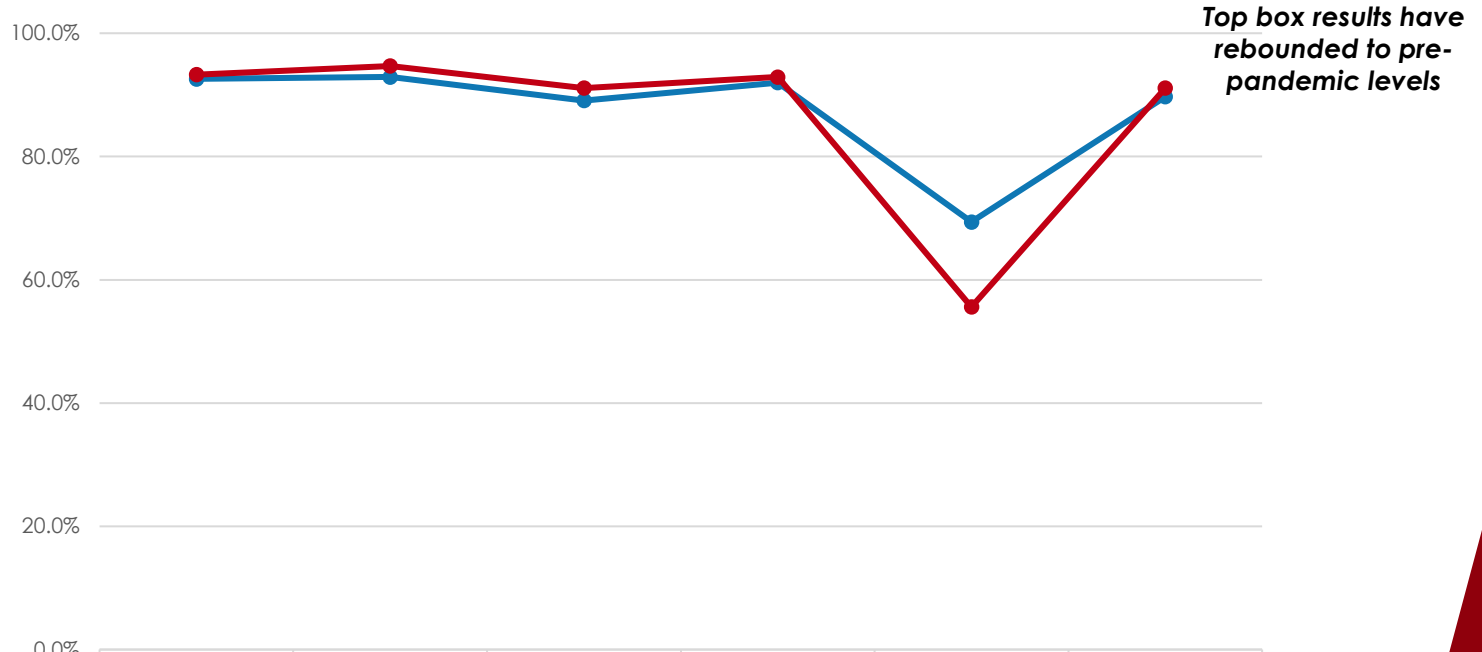


SATISFACTION – KAUA‘I

- ***Trips to Kaua‘i:*** First-time visitors to the island from U.S. East gave higher satisfaction scores than repeat visitors from this market.

SATISFACTION – KAUA‘I

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

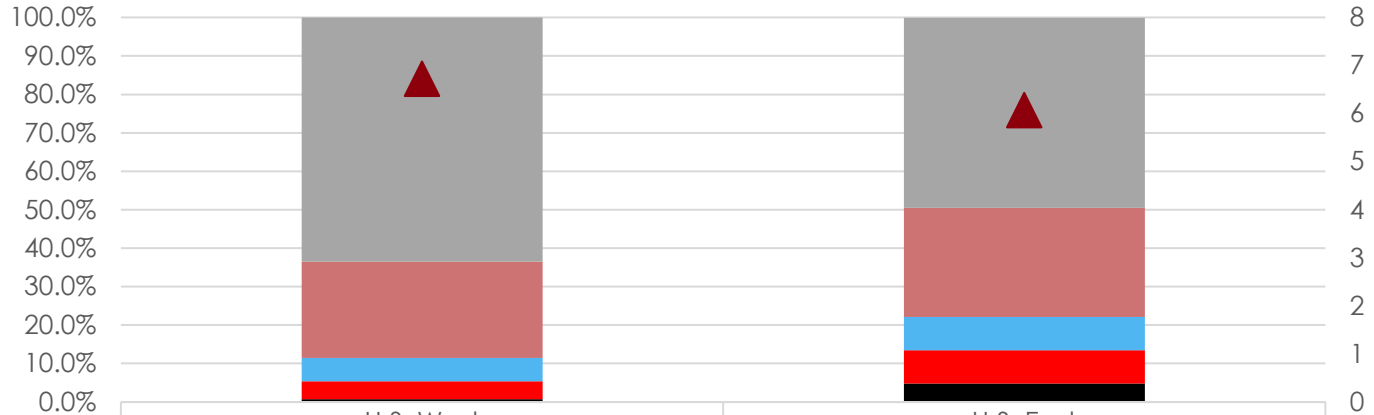


	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	92.6%	92.9%	89.1%	92.0%	69.4%	89.7%
U.S. East	93.3%	94.7%	91.1%	92.9%	55.6%	91.1%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – KAUA‘I

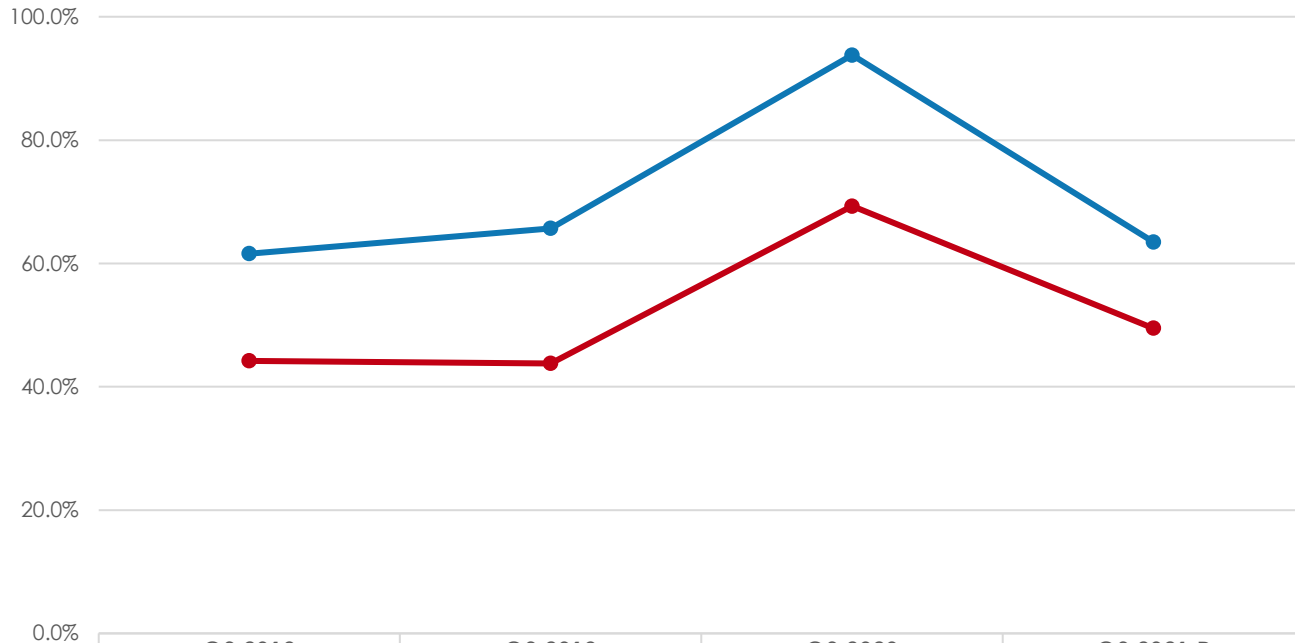
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	63.5%	49.5%
Somewhat likely (5-6)	25.0%	28.4%
Somewhat unlikely (3-4)	6.1%	8.6%
Very unlikely (1-2)	4.6%	8.7%
Not sure	0.7%	4.8%
BASE	274	289
MEAN	6.72	6.07

LIKELIHOOD OF RETURN VISIT – KAUA‘I

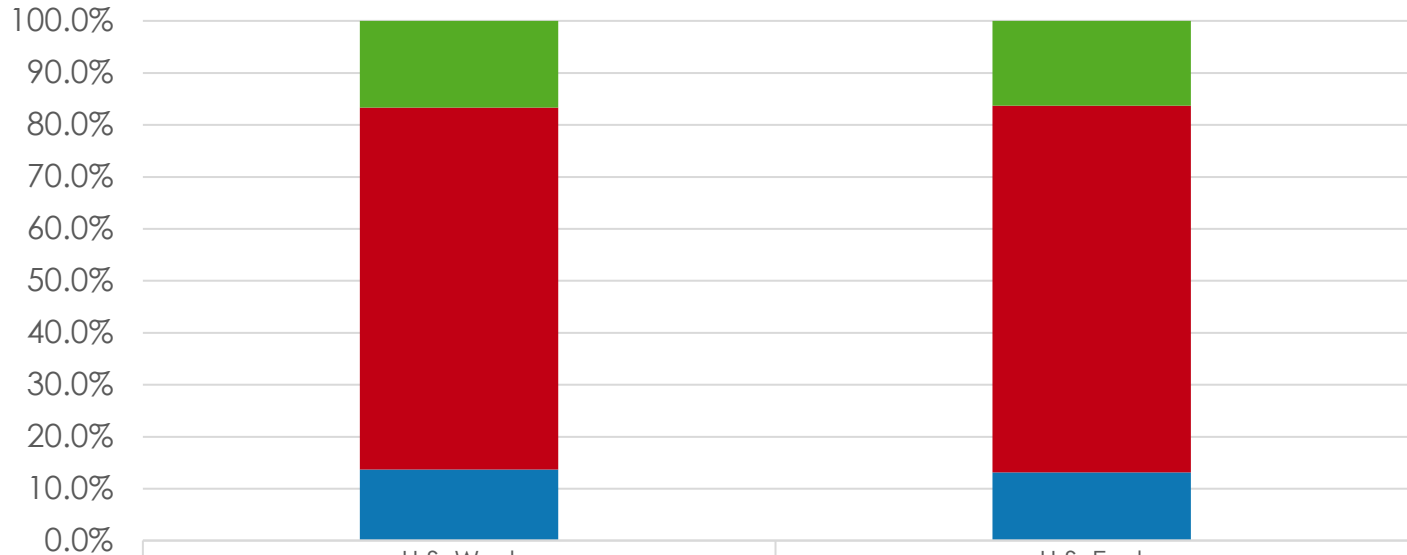
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	61.6%	65.7%	93.8%	63.5%
U.S. East	44.2%	43.8%	69.3%	49.5%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – KAUA‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	16.7%	16.3%
■ No Prior Awareness	69.6%	70.6%
■ Unsure	13.7%	13.1%
BASE	274	289

ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
Fern Grotto	10.9%	11.5%
Hanalei Town	52.1%	50.7%
Hanalei Beach	49.9%	49.3%
Kalapaki Beach	21.5%	30.6%
Kalalau Trail	12.7%	22.2%
Bike Path in Kapaa	11.5%	10.4%
Kaua‘i Museum	1.8%	3.1%
Ke‘e Beach	11.9%	16.3%
Kilauea Lighthouse	22.6%	27.4%
Koke‘e	8.5%	13.5%

ATTRACTIONS – KAUA‘I (cont.)

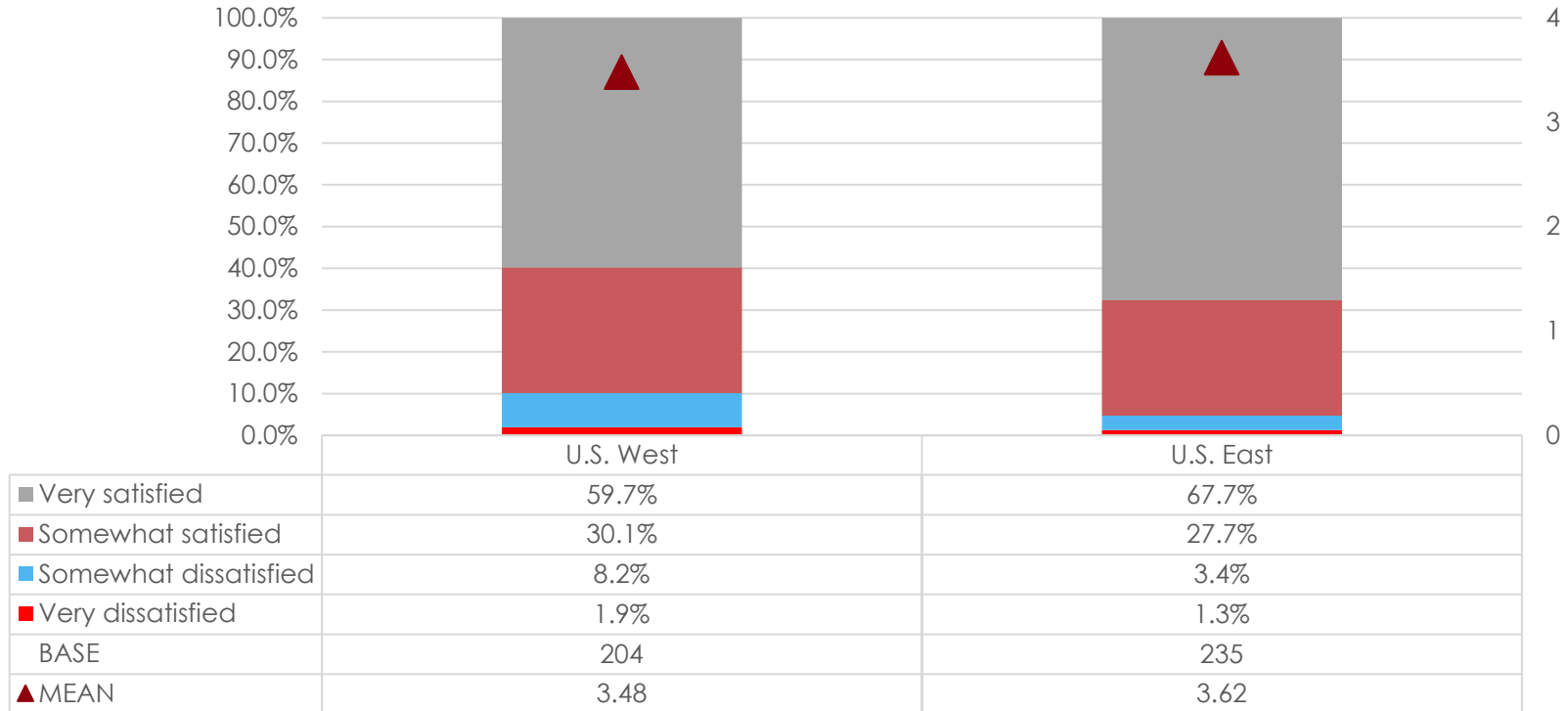
	U.S. West	U.S. East
Koke'e Museum	2.6%	4.9%
Na Aina Kai Gardens	2.6%	1.7%
Napali Coast	43.4%	64.6%
Allerton Garden	8.0%	6.6%
Limahuli Garden	4.7%	6.2%
Old Koloa Town	40.5%	34.0%
Opaeka'a Falls	16.3%	23.3%
Po'ipu Beach	63.5%	62.9%
Smith's Tropical Paradise Gardens	9.5%	8.3%
Spouting Horn	36.5%	30.2%
Wailua Falls	36.6%	47.6%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	29.1%	27.4%
Waimea Canyon	52.2%	65.3%
Disc Golf	1.1%	0.3%
Mini Golf	1.1%	1.0%

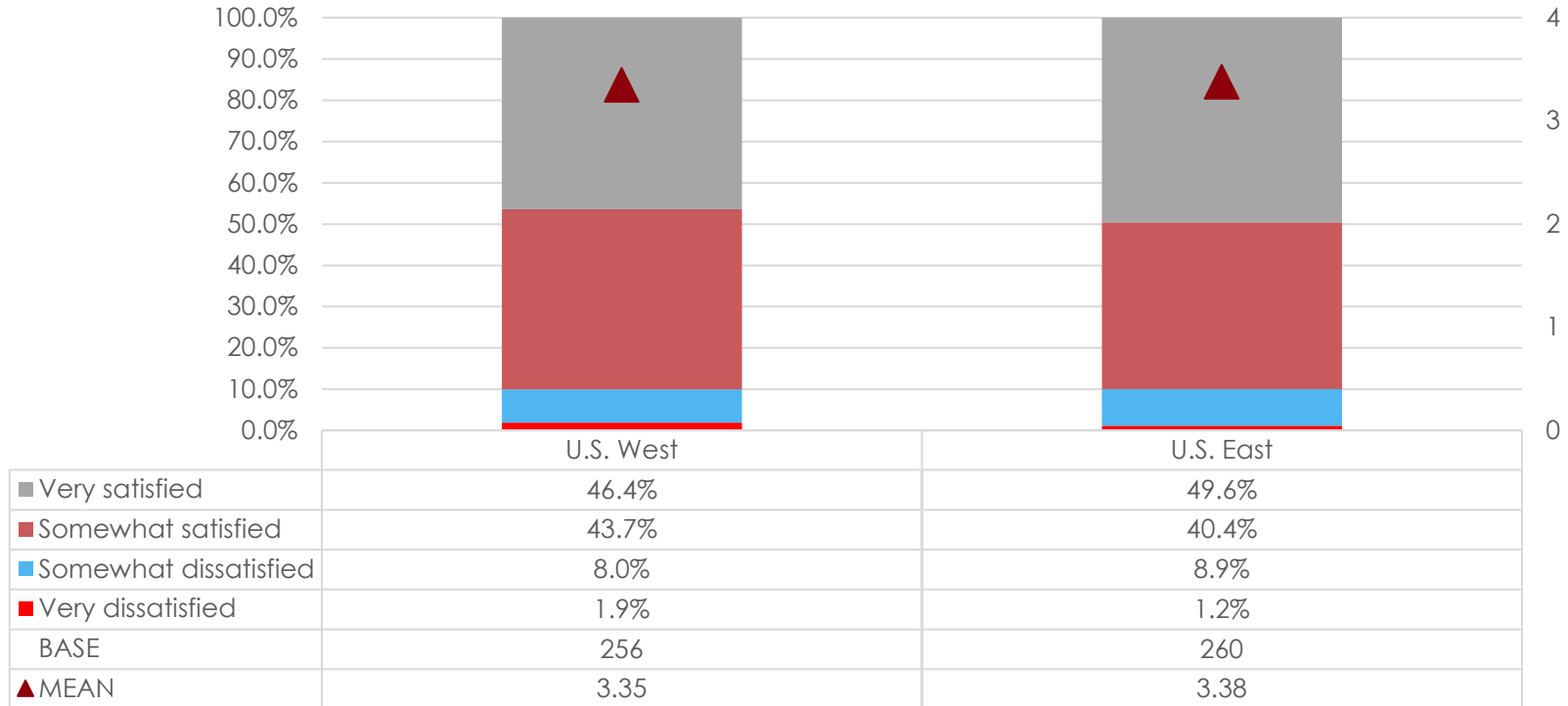
SATISFACTION – ENTERTAINMENT

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



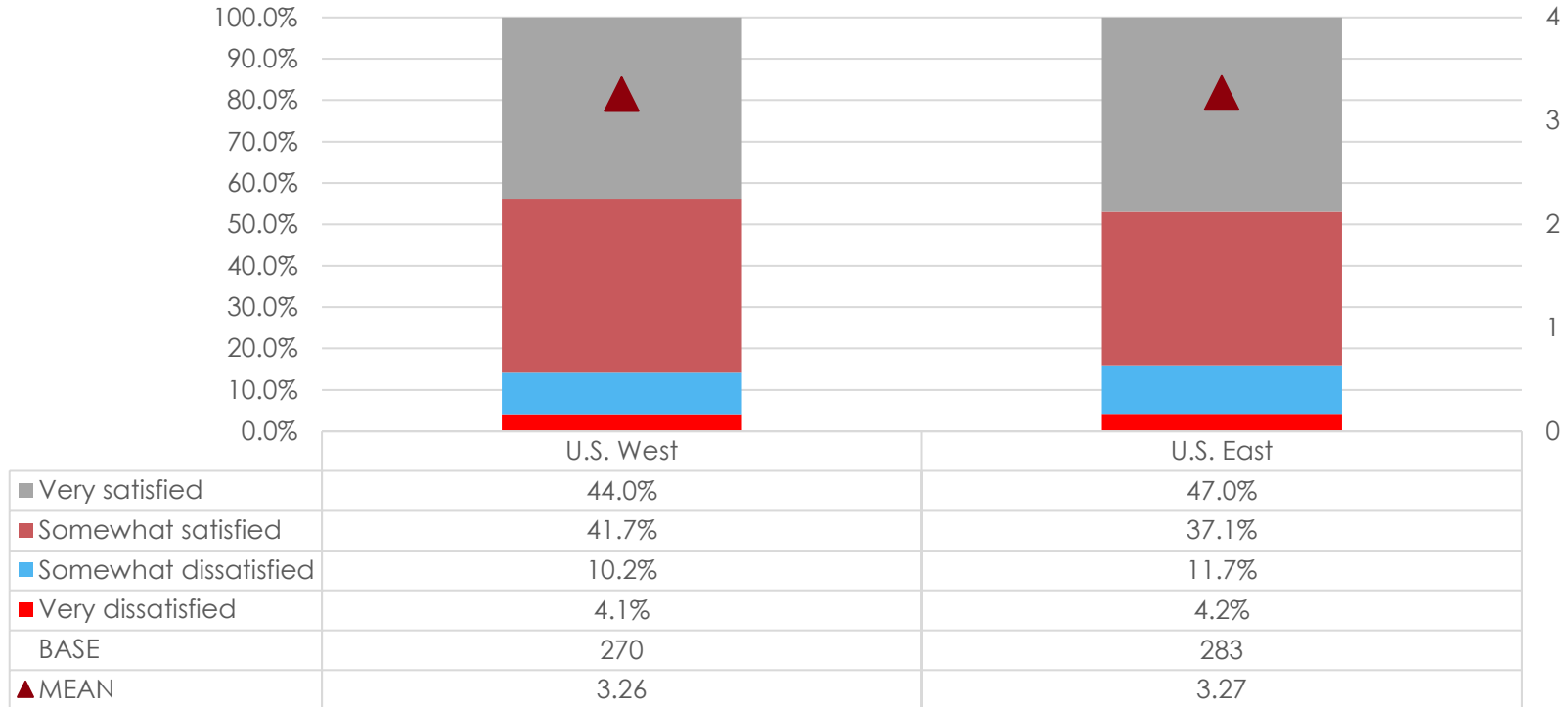
SATISFACTION – SHOPPING

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



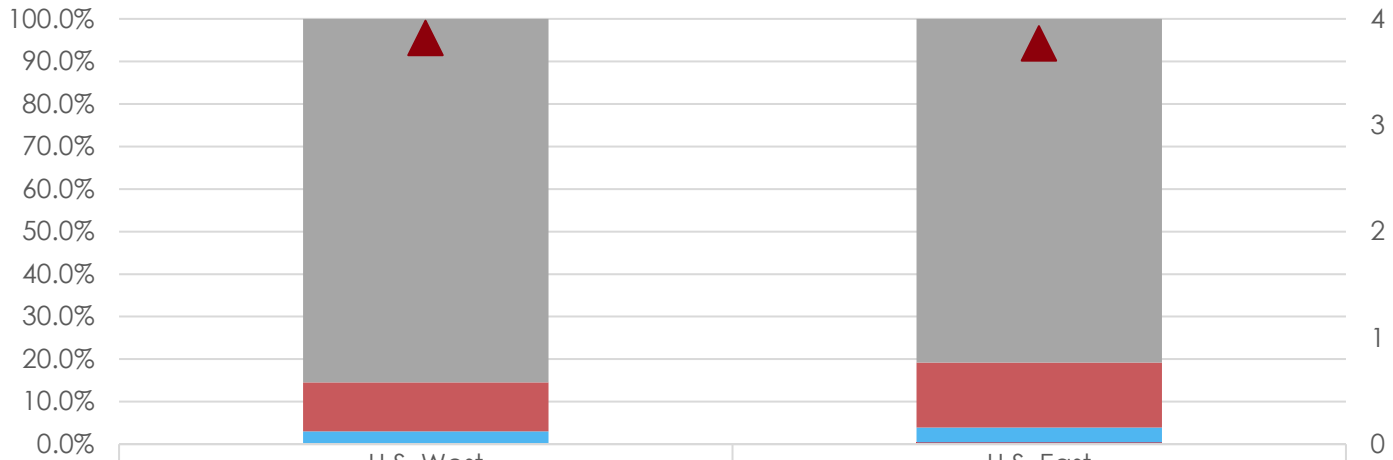
SATISFACTION – DINING

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



SATISFACTION – BEACHES

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

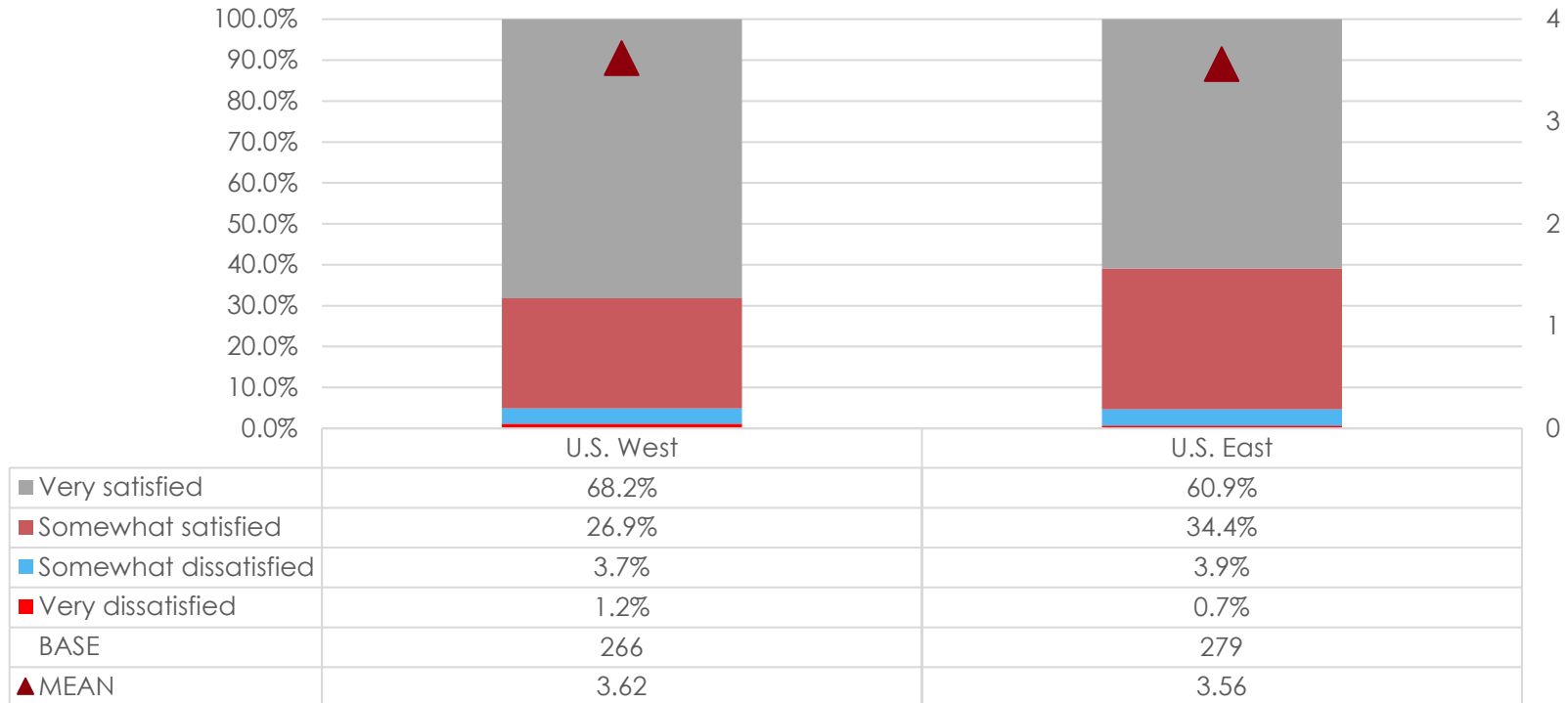


	U.S. West	U.S. East
Very satisfied	85.5%	80.8%
Somewhat satisfied	11.5%	15.3%
Somewhat dissatisfied	3.0%	3.5%
Very dissatisfied	0.0%	0.4%
BASE	270	282
MEAN	3.82	3.77



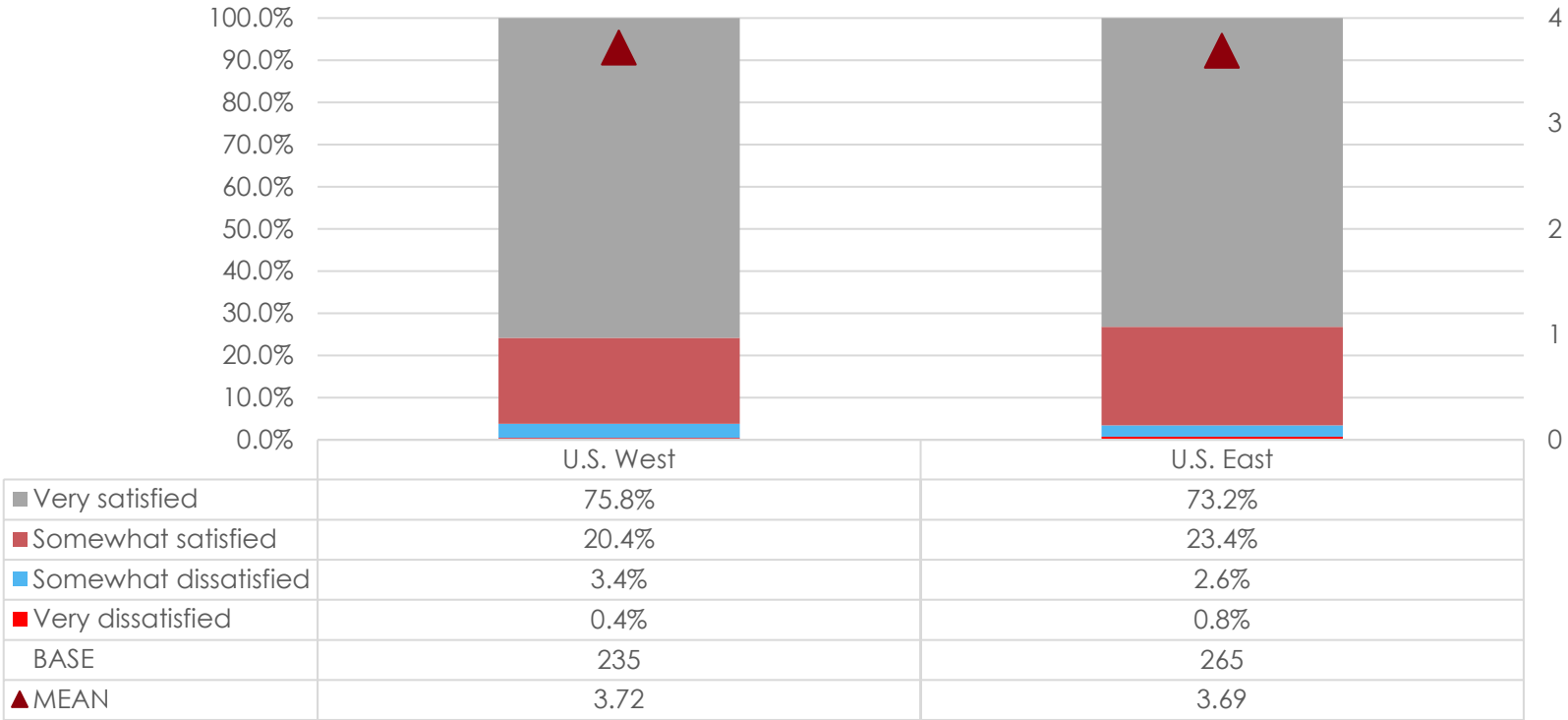
SATISFACTION – PUBLIC AREAS

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



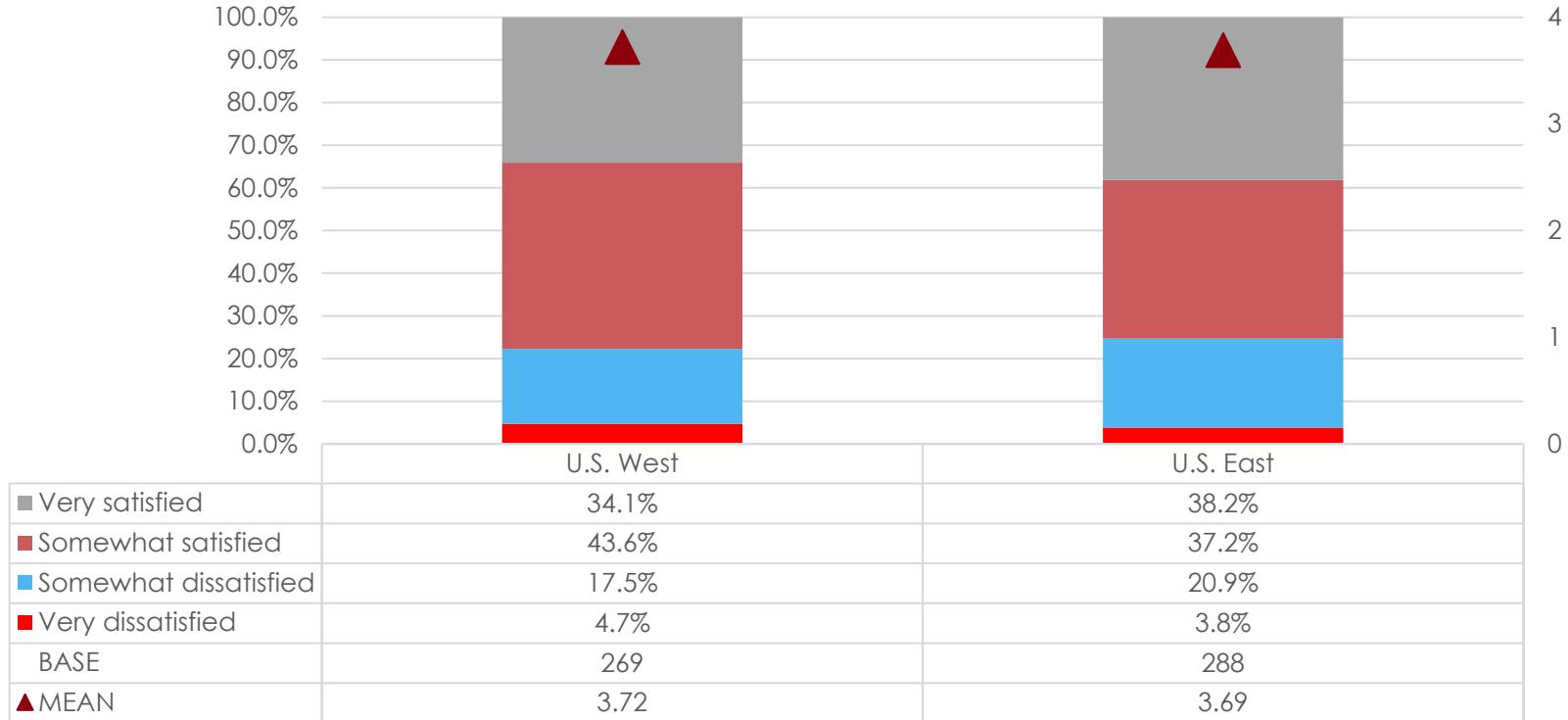
SATISFACTION – PARKS

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



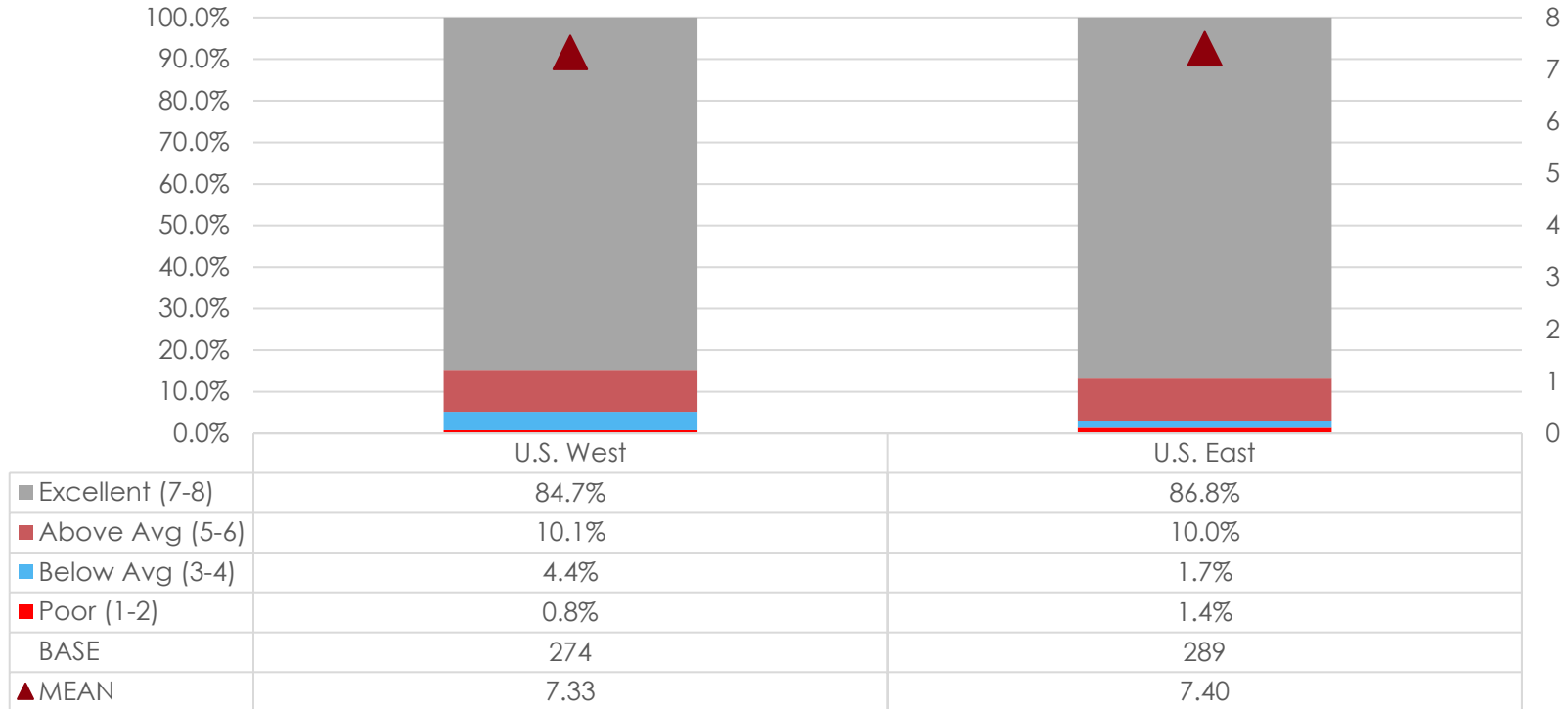
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

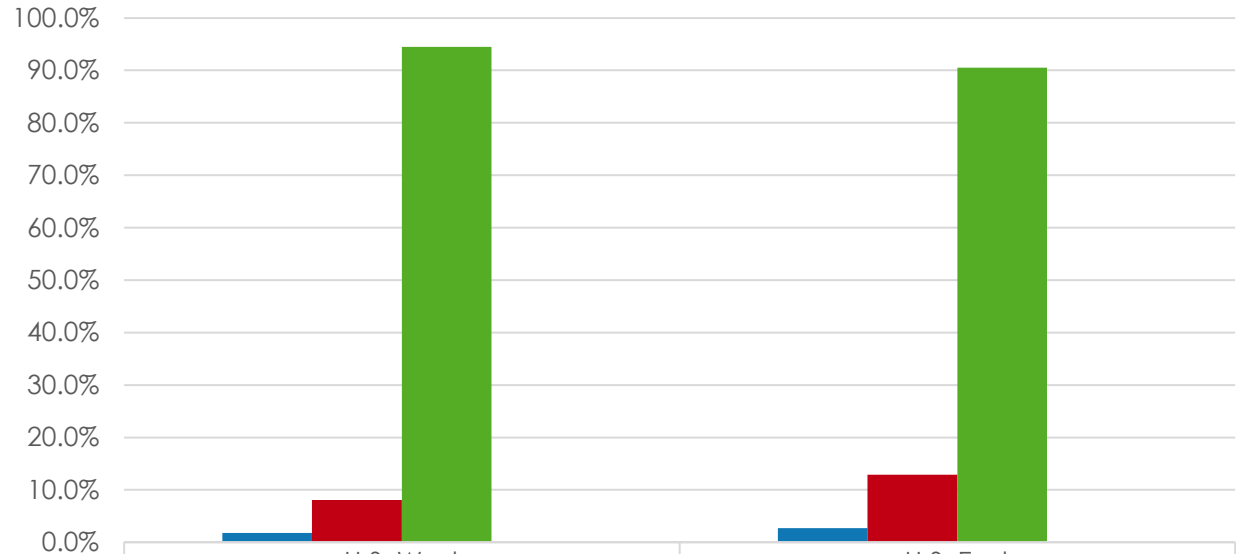
8-pt Rating Scale
8=Excellent / 1=Poor



TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
Been here before	48.6%	30.2%
Friend recommendation	25.2%	36.3%
Visiting Family/ Friends	4.7%	5.2%
Article/ Blog	3.8%	6.9%
Location/ Never been, but went to other islands	3.6%	1.4%
Attending Conference/ Event	2.6%	2.1%
Travel Agent	1.6%	3.1%
Own a timeshare	2.0%	1.0%
Social Media Post	0.7%	3.5%
Nature/ Beauty/ Scenery	1.2%	1.7%
Relaxing/ least crowded/ laid back	1.1%	1.4%
Business related	1.1%	1.0%

SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ Neither of these	1.8%	2.7%
■ Full-face snorkel mask	8.1%	12.9%
■ 2-Piece, separate mask & snorkel	94.5%	90.5%
BASE	164	147

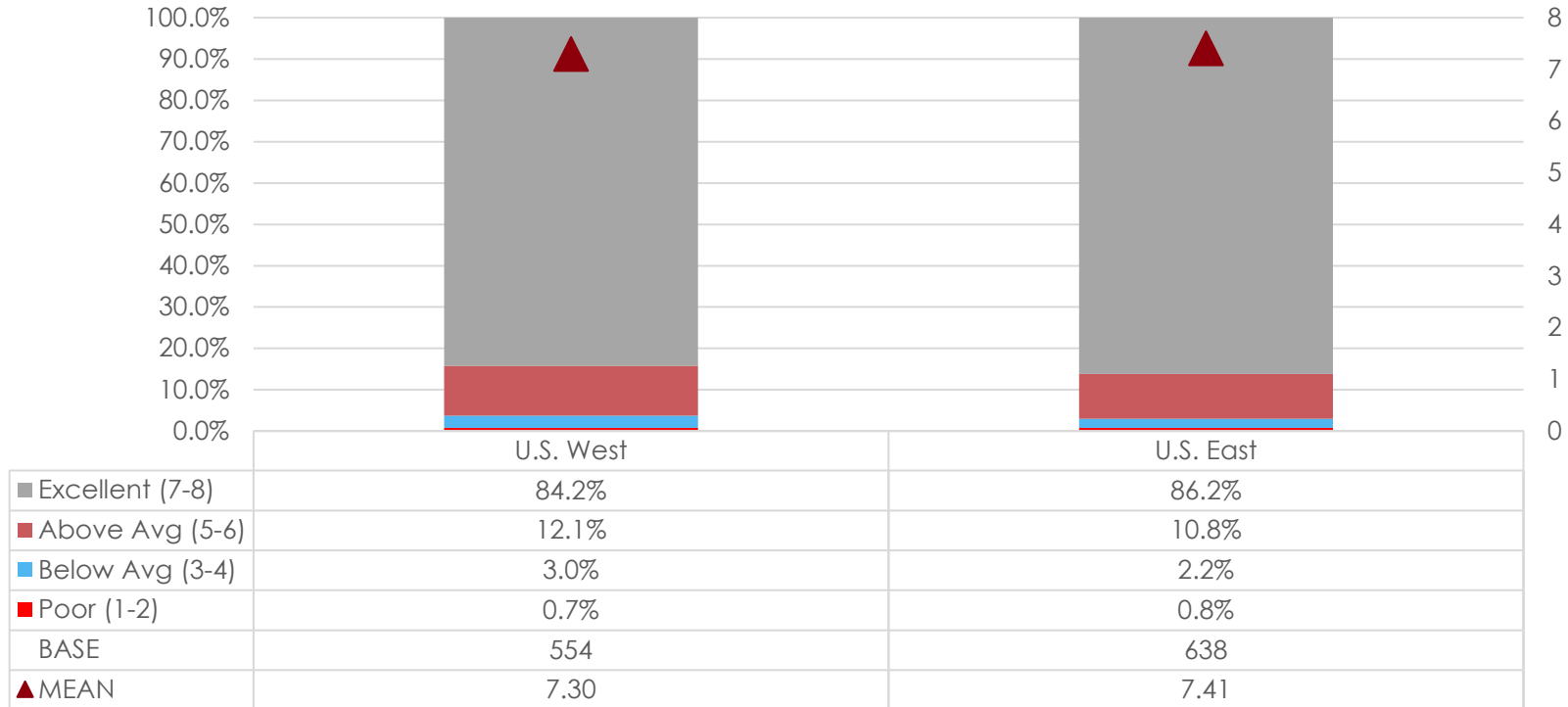
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.8%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	1.2%	-
Yes, needed assistance – using full-face snorkel mask	-	-
BASE	113	121

SECTION 7 – MAUI

SATISFACTION – MAUI

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

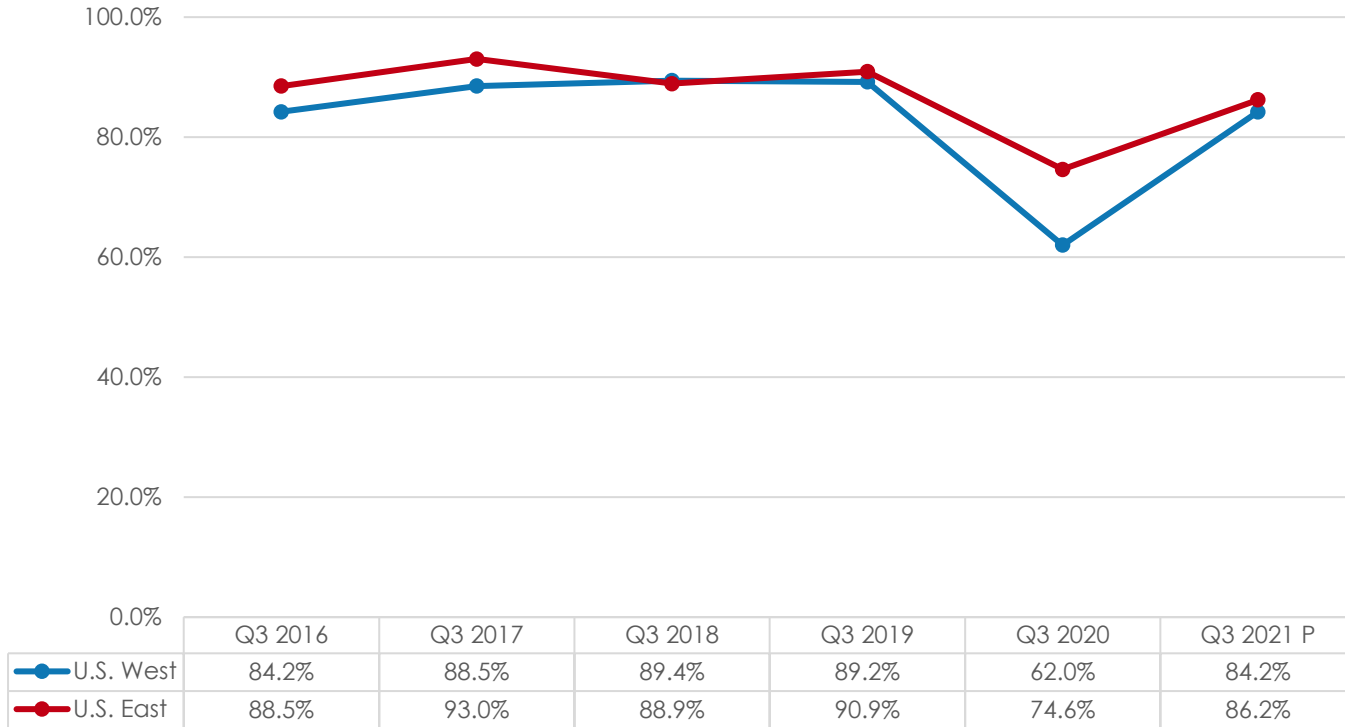


SATISFACTION – MAUI

- **Gender:** Satisfaction ratings for Maui were higher among female visitors from U.S. West compared to male visitors.
- **Trips to the state:** U.S. West visitors who were first-timers to Maui gave higher satisfaction scores compared to those who have visited the state previously.

SATISFACTION – MAUI

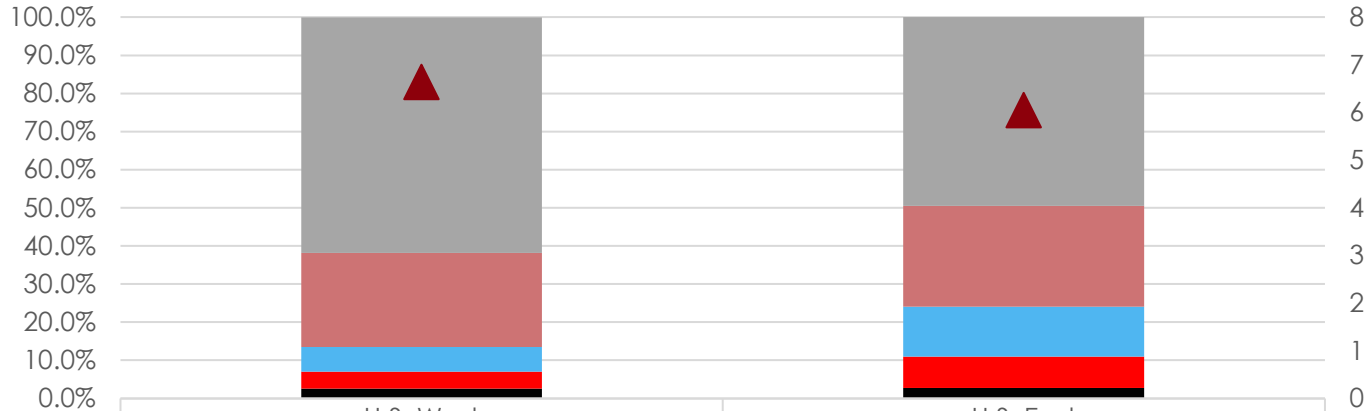
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – MAUI

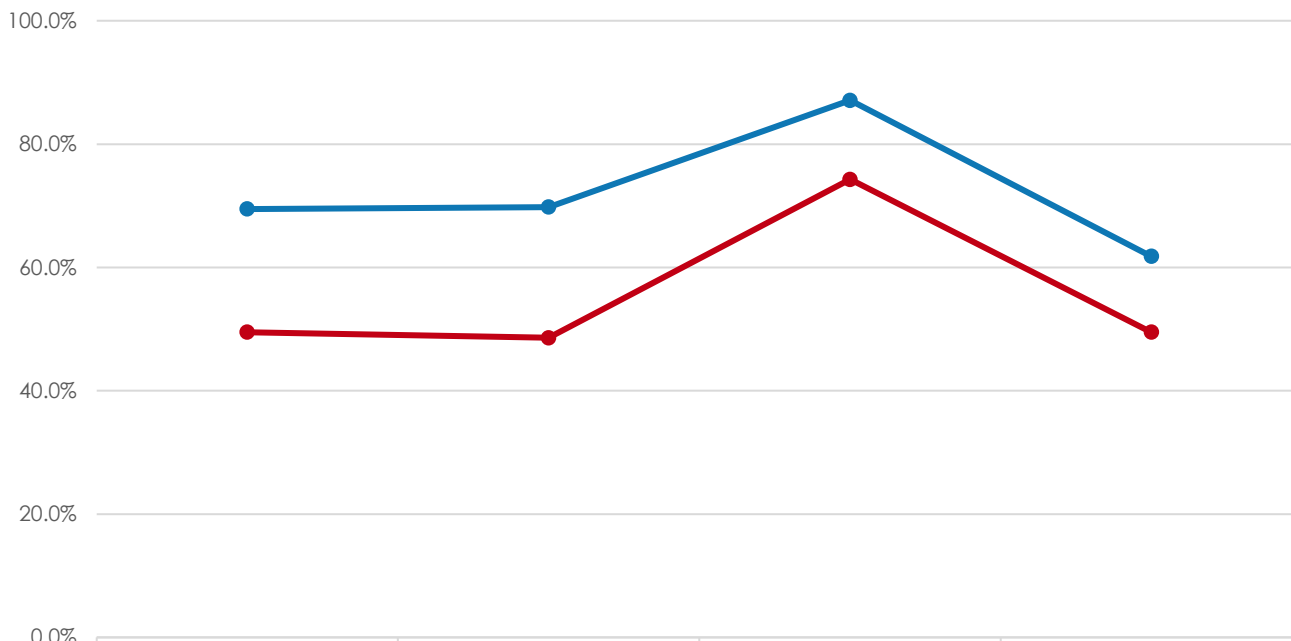
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	61.8%	49.5%
Somewhat likely (5-6)	24.7%	26.4%
Somewhat unlikely (3-4)	6.5%	13.1%
Very unlikely (1-2)	4.4%	8.3%
Not sure	2.6%	2.7%
BASE	522	556
MEAN	6.64	6.05

LIKELIHOOD OF RETURN VISIT – MAUI

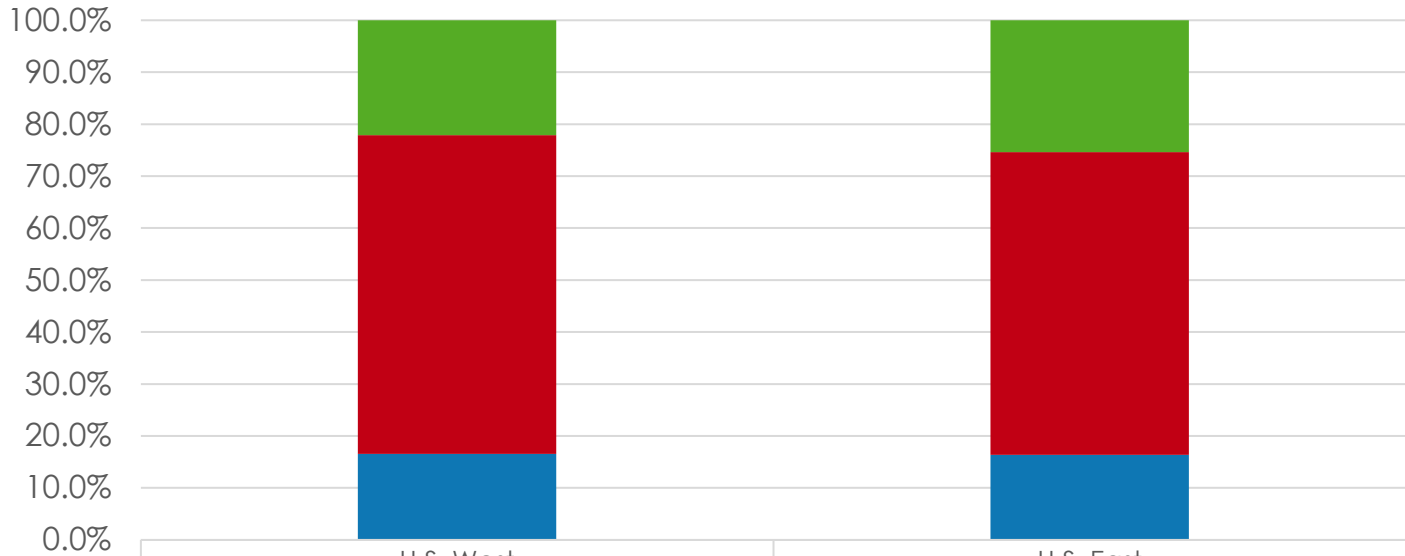
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	69.5%	69.8%	87.1%	61.8%
U.S. East	49.5%	48.6%	74.3%	49.5%

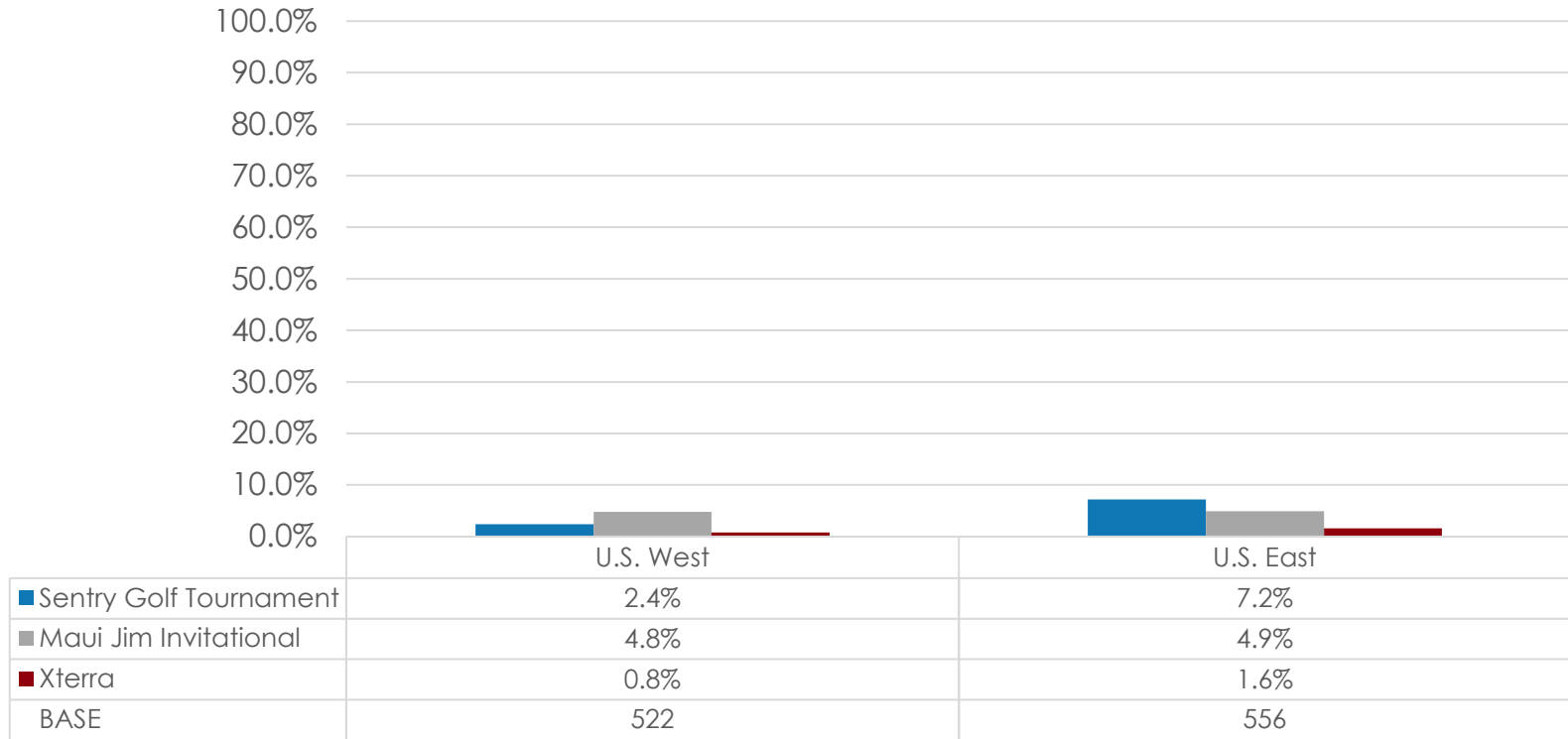
P= Preliminary Data

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	22.1%	25.4%
■ No Prior Awareness	61.4%	58.3%
■ Unsure	16.5%	16.4%
BASE	522	556

AIDED ADVERTISING AWARENESS – MAUI EVENTS



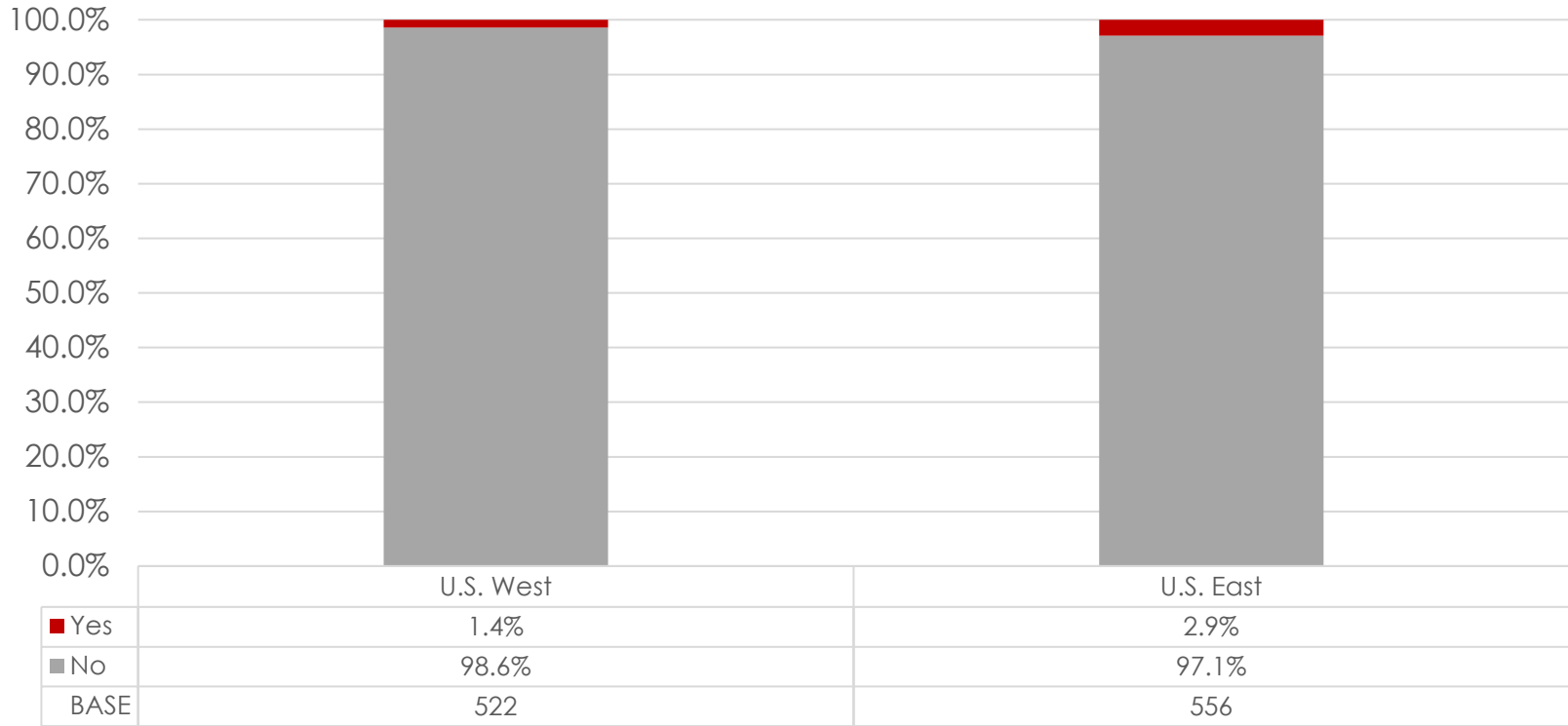
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
Famous landmarks or imagery/ natural beauty	42.6%	56.8%
Outdoor or sporting activities and events	18.7%	20.1%
Hawaiian cultural events	12.2%	14.2%
Social media posts and videos	10.3%	16.5%
Hawaiian Music	7.2%	5.9%
TV programs/ Movies filmed in Hawai'i	5.1%	7.7%
None of these	45.3%	33.6%

ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	0.9%	1.6%
Aquarium Maui /Maui Ocean Center	17.5%	13.5%
Baldwin Missionary Home Museum	3.8%	4.3%
Hale Pa'i Printing House	0.0%	0.2%
Haleakala National Park	29.8%	51.2%
Haleki'i-Pihana Heiau State Monument	1.1%	2.2%
Hana Cultural Center	8.3%	11.2%
'Iao Valley State Monument	15.1%	16.8%
Kepaniwai Park & Heritage Gardens	3.1%	4.5%
Kula Botanical Garden	6.7%	6.3%
Maui Historical Society Bailey House Museum	2.1%	1.6%
Whaler's Village Museum	12.7%	12.6%
Wo Hing Temple Museum	1.6%	0.9%

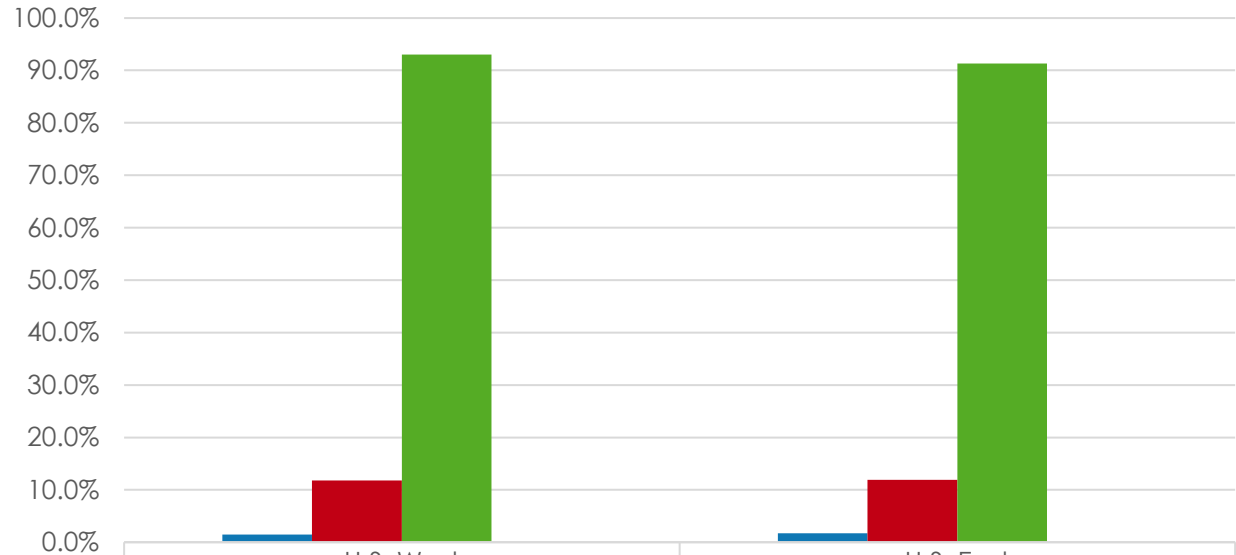
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Personal – wedding/ honeymoon/ birthday/ funeral/ graduation	29.7%	87.5%
Convention/ conference/ workshop	43.2%	-
Other sporting event	13.5%	6.3%
Sentry Tournament of Golf	13.5%	-
Other	-	6.2%
BASE	7	16

SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ Neither	1.5%	1.7%
■ Full-face snorkel mask	11.8%	11.9%
■ 2-Piece, separate mask & snorkel	93.0%	91.3%
BASE	327	346

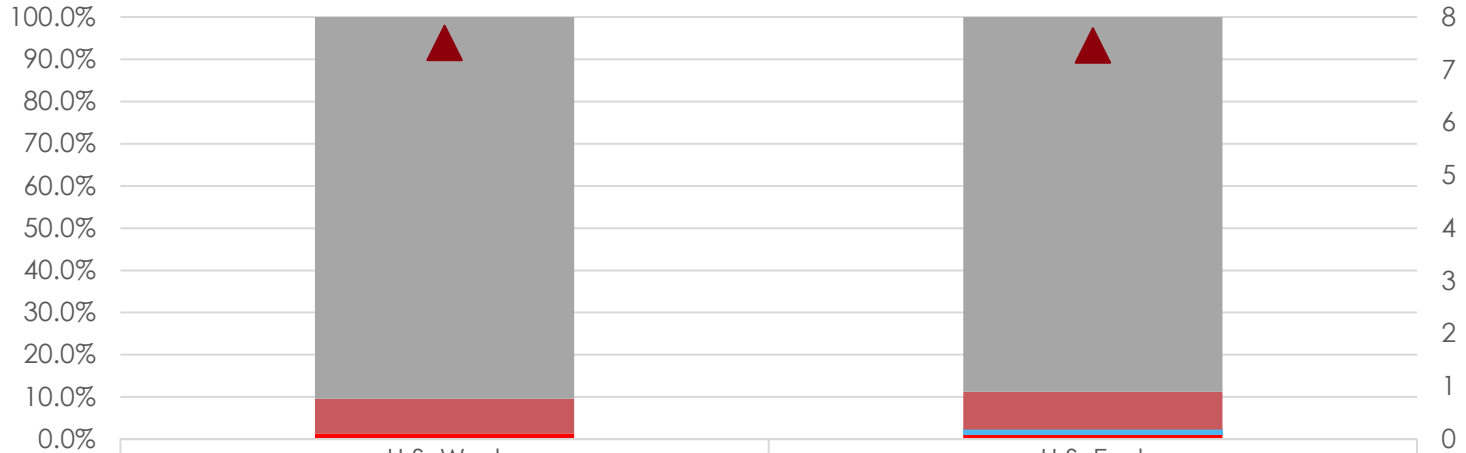
SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
Did not have to be assisted or rescued	97.4%	97.9%
Yes needed assistance- two-piece mask & snorkel	2.3%	2.1%
Yes, needed assistance – full-snorkel facemask	0.4%	-
BASE	322	340

SECTION 8 – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

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



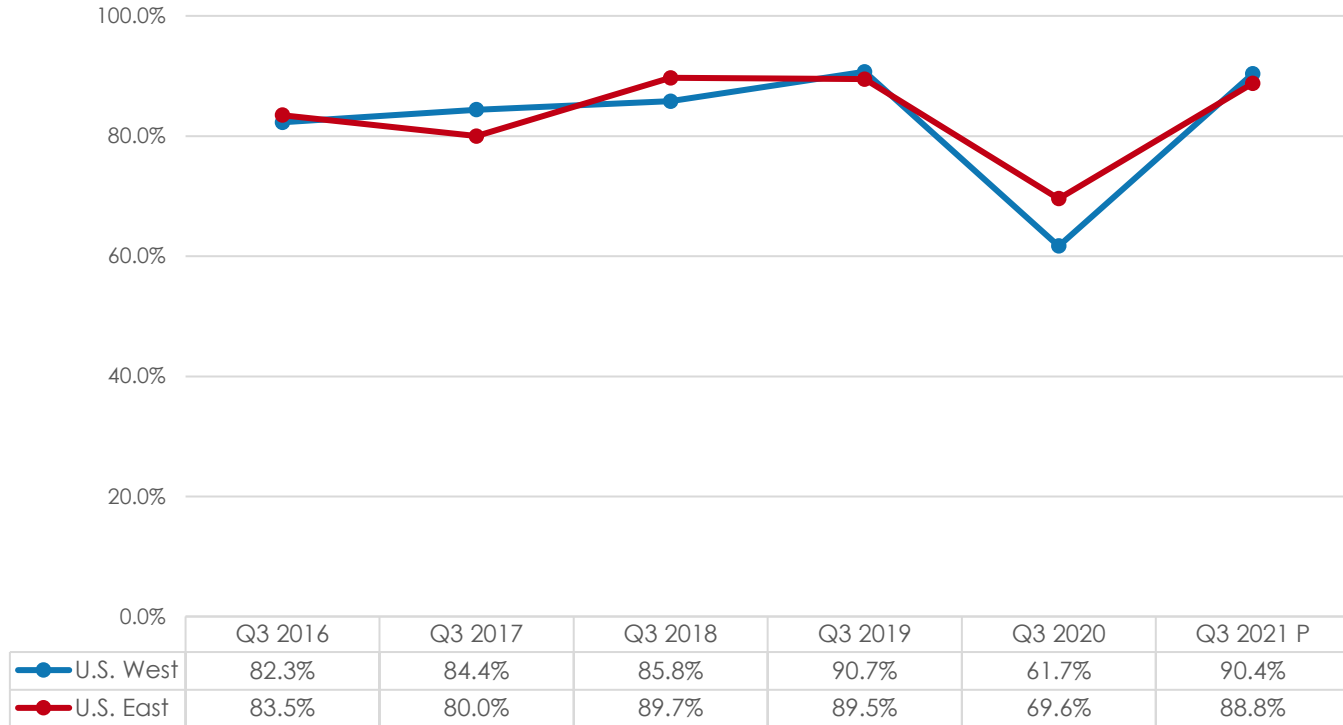
	U.S. West	U.S. East
■ Excellent (7-8)	90.4%	88.8%
■ Above Avg (5-6)	8.2%	8.9%
■ Below Avg (3-4)	0.0%	1.3%
■ Poor (1-2)	1.4%	1.0%
BASE	307	392
▲ MEAN	7.51	7.46

SATISFACTION – ISLAND OF HAWAI‘I

- *No statistically significant differences this quarter.*

SATISFACTION – ISLAND OF HAWAII

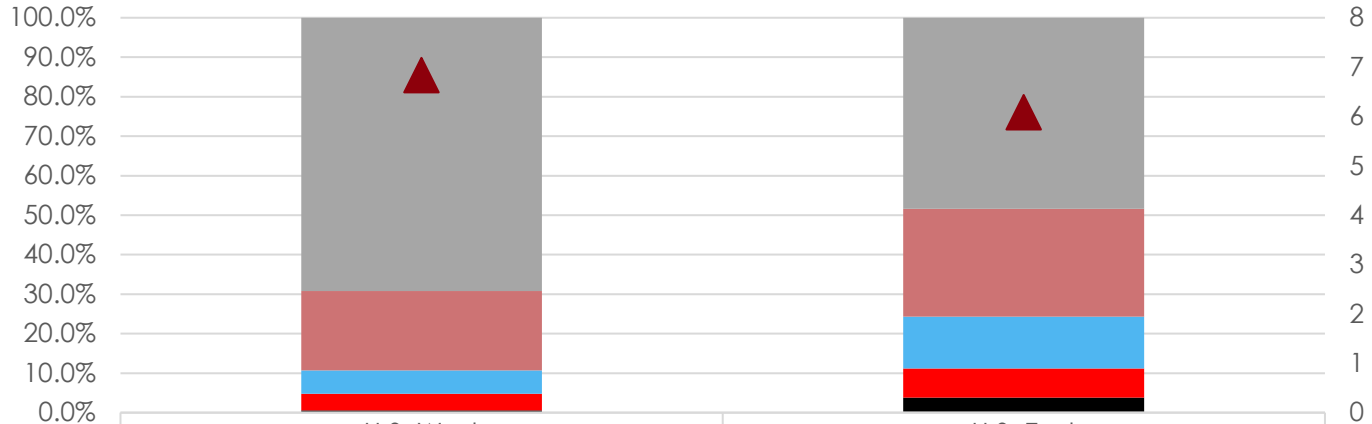
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

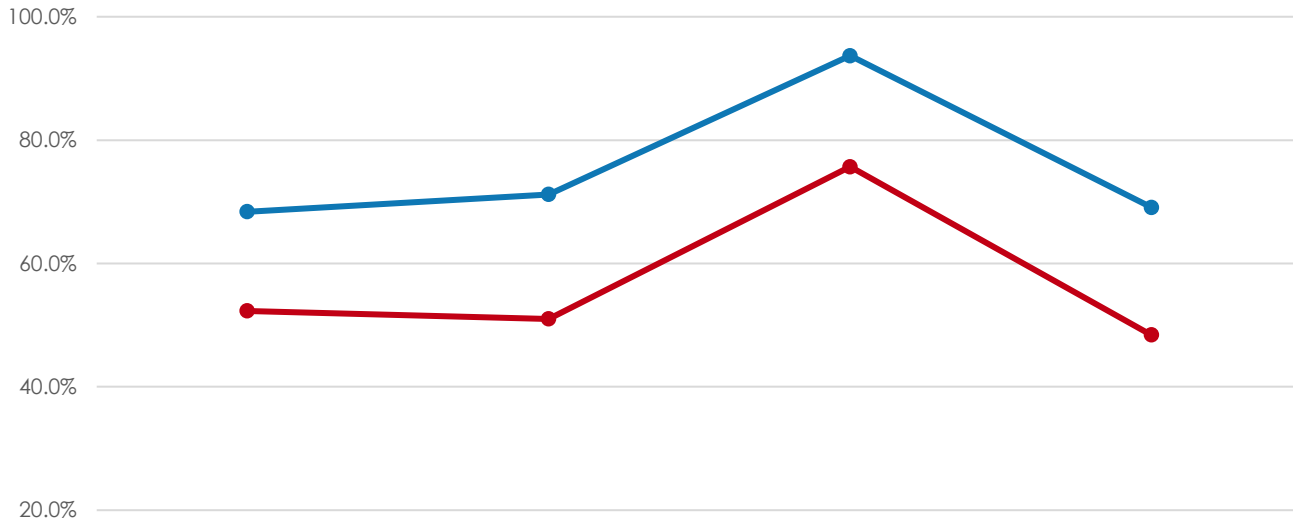
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	69.1%	48.4%
■ Somewhat likely (5-6)	20.2%	27.3%
■ Somewhat unlikely (3-4)	5.9%	13.1%
■ Very unlikely (1-2)	4.2%	7.4%
■ Not sure	0.6%	3.8%
BASE	299	366
▲ MEAN	6.84	6.09

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

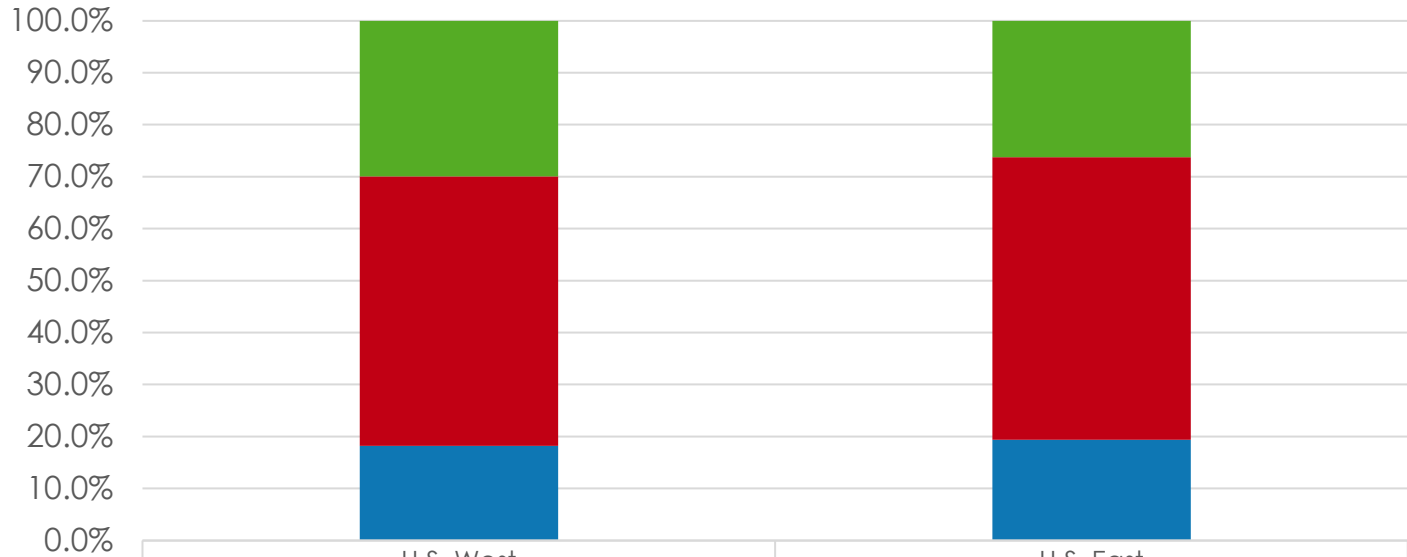
TOP BOX – EXCELLENT (7-8)



	Q3 2018	Q3 2019	Q3 2020	Q3 2021 P
U.S. West	68.4%	71.2%	93.7%	69.1%
U.S. East	52.3%	51.0%	75.7%	48.4%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
Aided Ad Awareness	29.9%	26.2%
No Prior Awareness	51.9%	54.4%
Unsure	18.2%	19.4%
BASE	299	366

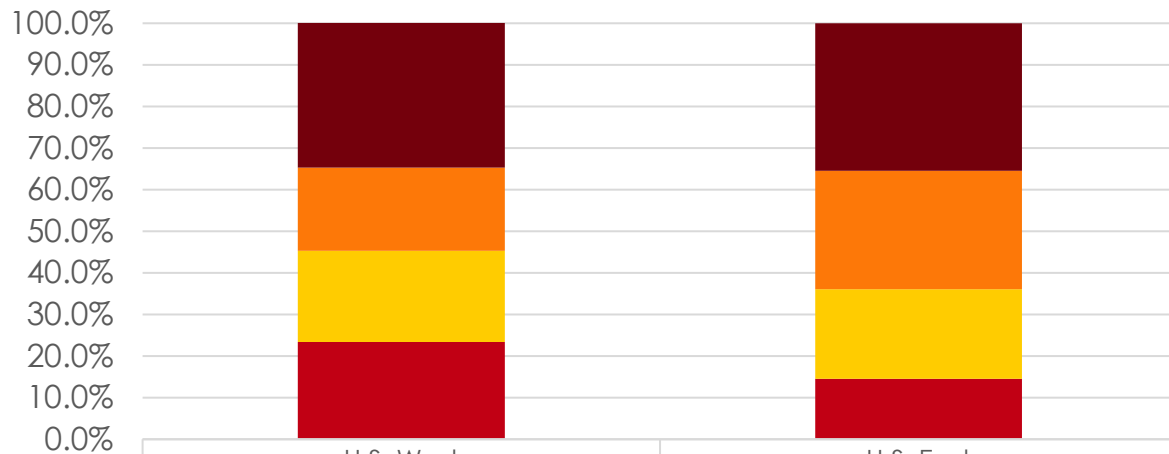
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	32.1%	39.4%
Botanical Gardens	17.9%	21.2%
H.N. Greenwell Store	4.2%	6.1%
Hawai'i Volcanoes National Park	53.8%	71.9%
Hilo Farmers Market	29.9%	25.6%
Hulihe'e Palace	4.2%	3.9%
'Imiloa Astronomy Ctr	1.8%	1.9%
Kaloko-Honokohau National Historical Park	10.6%	10.5%
Kona Coffee Living History Farm	15.6%	13.8%
Lili'uokalani Park and Garden	7.5%	9.1%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

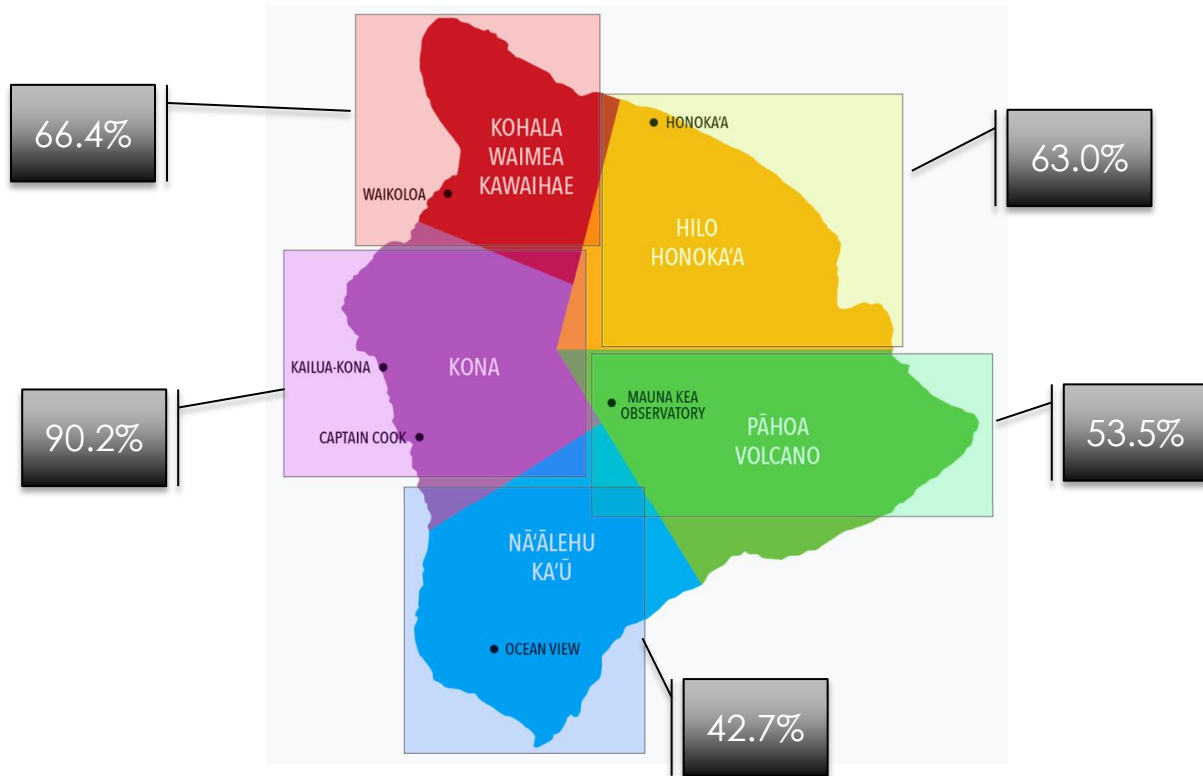
	U.S. West	U.S. East
Lyman House Memorial Museum	1.0%	0.8%
Maunakea	21.7%	25.9%
Orchid Farm	2.3%	0.6%
Pacific Tsunami Museum	0.0%	1.9%
Pana'ewa Rainforest Zoo & Garden	3.1%	2.8%
Pu'uuhonua o Honaunau National Historical Park	20.7%	24.2%
Pu'ukohola Heia National Historical Site	10.8%	10.7%
Punalu'u Black Sand Beach	39.6%	44.6%
Rainbow Falls	27.2%	41.9%
Volcano Art Center	6.8%	10.5%

TRAVEL ON ISLAND OF HAWAI'I

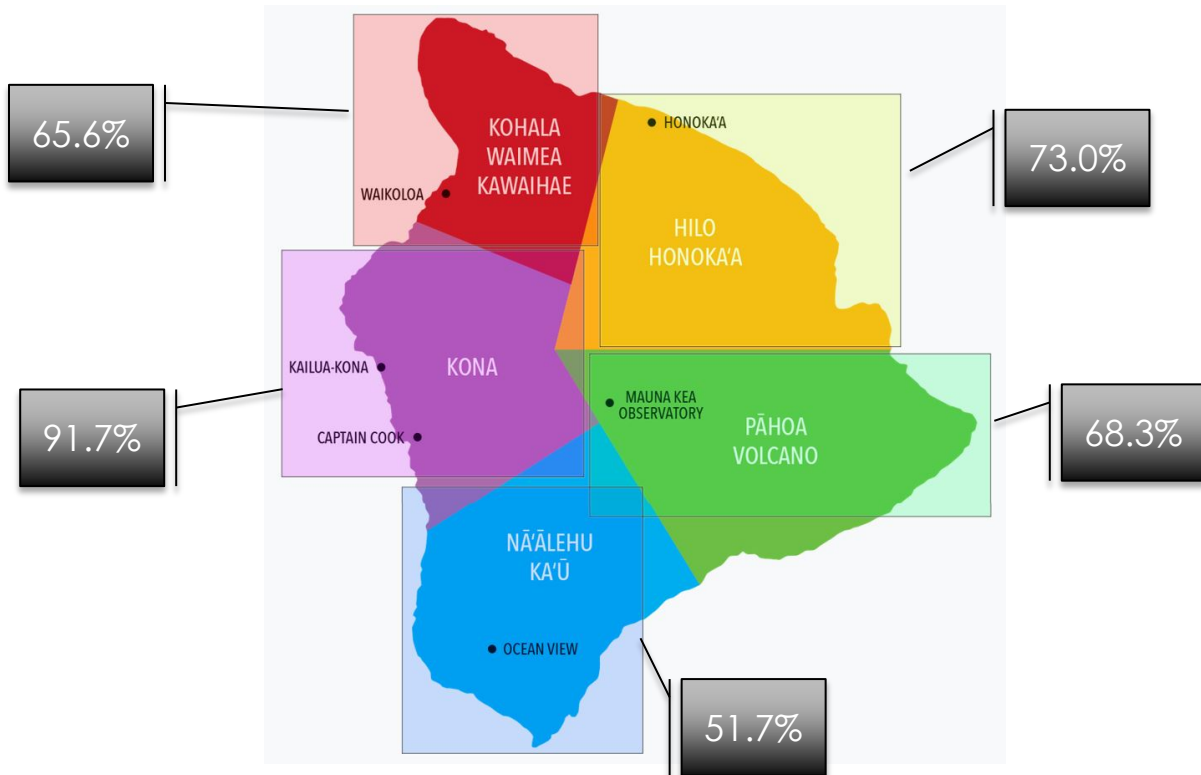


	U.S. West	U.S. East
■ Traveled to other side of island	34.8%	35.5%
■ Traveled more than 1 hour one way to reach activities	20.0%	28.4%
■ Traveled 1 hour or less one way to reach activity	21.9%	21.6%
■ Enjoy activities- short drive from accommodations	23.4%	14.5%
● BASE	299	366

AREAS VISITED U.S. WEST

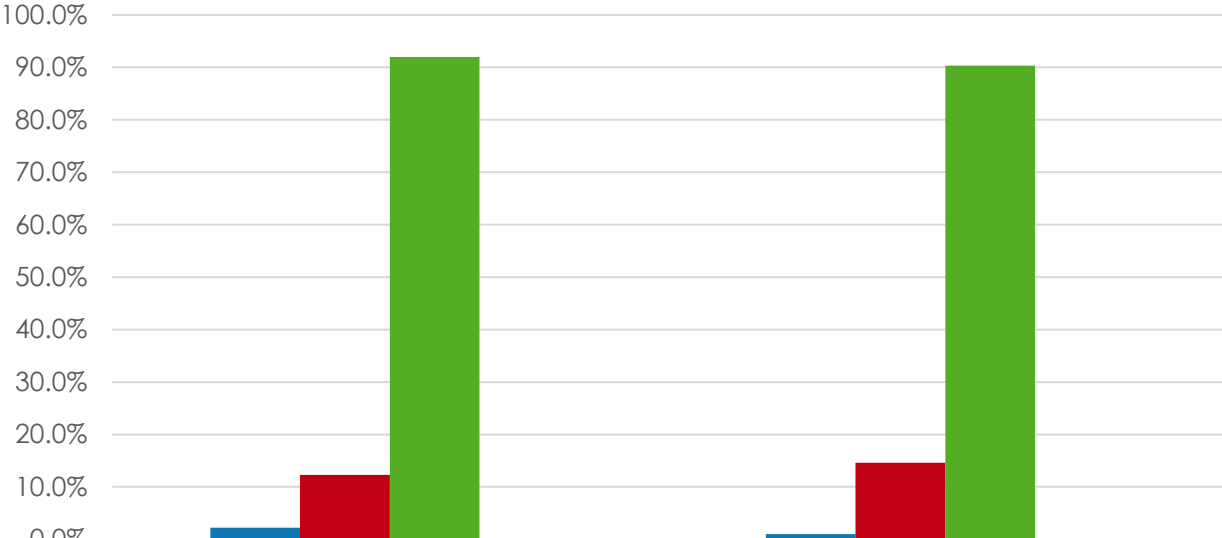


AREAS VISITED U.S. EAST



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

SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



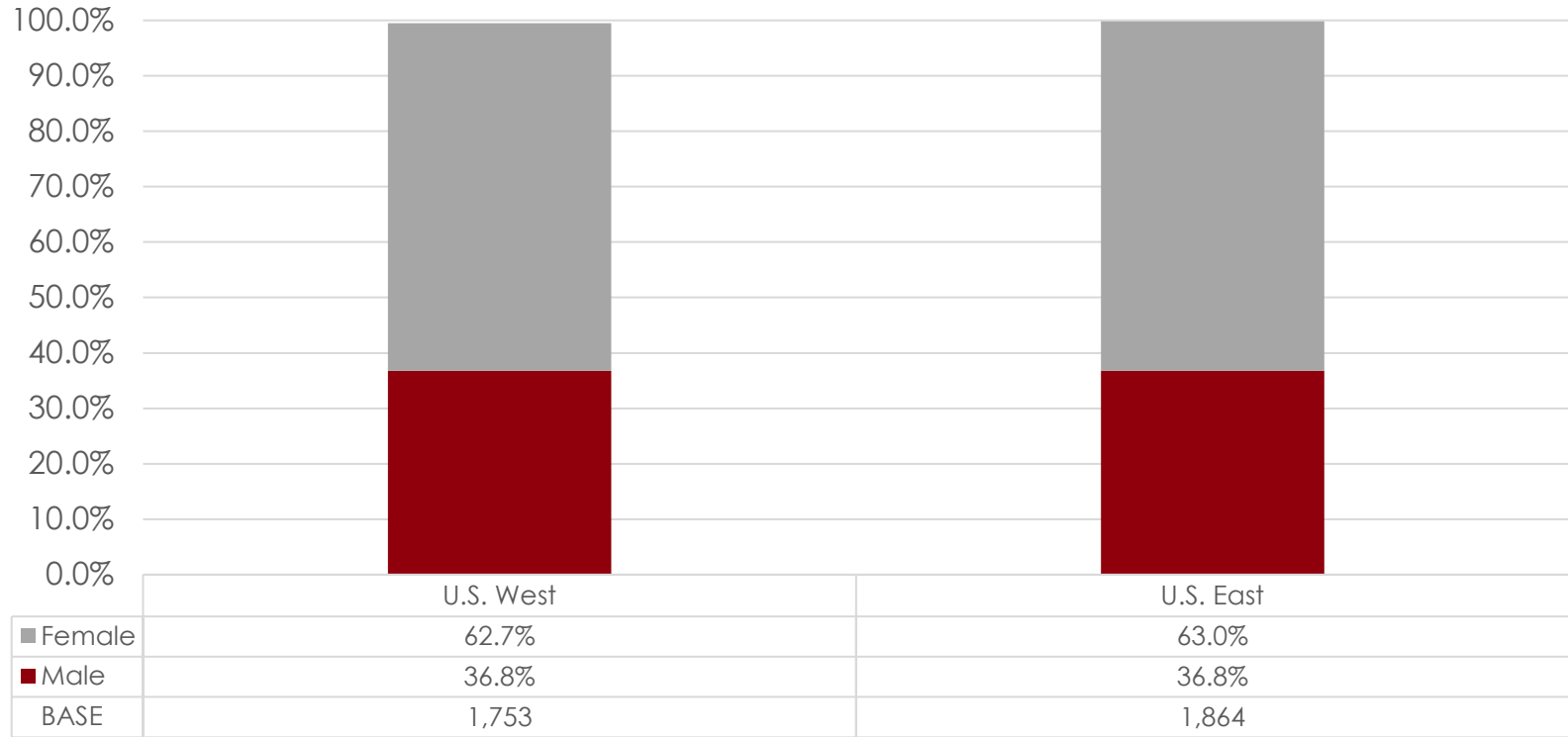
	U.S. West	U.S. East
■ Neither of these	2.2%	1.0%
■ Full-face snorkel mask	12.3%	14.6%
■ 2-Piece, separate mask & snorkel	92.0%	90.3%
BASE	183	206

SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

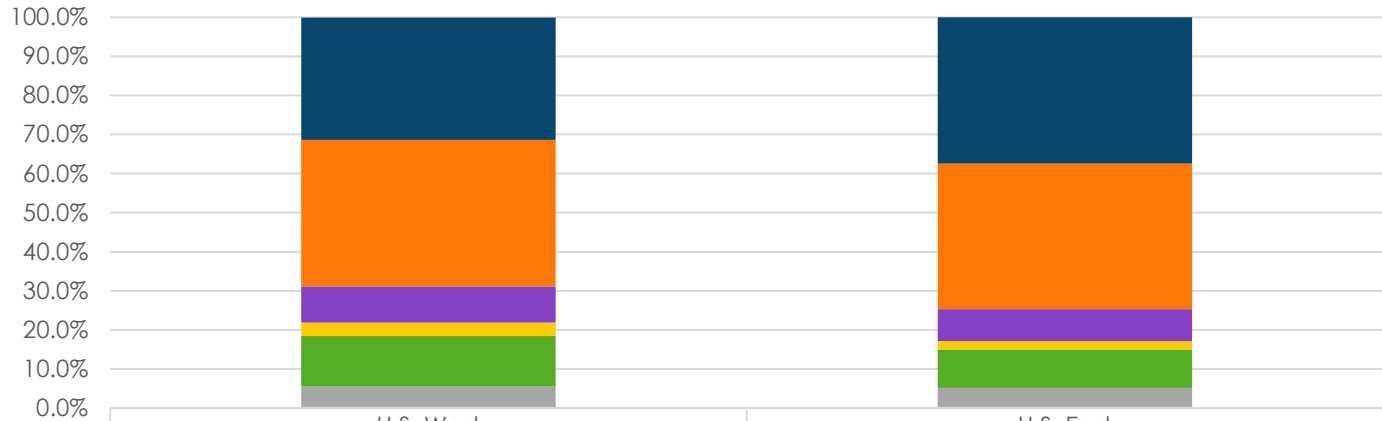
	U.S. West	U.S. East
Did not have to be assisted or rescued	99.5%	98.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.5%	1.0%
Yes, needed assistance – using full-face mask	-	1.0%
BASE	179	204

SECTION 9 – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION

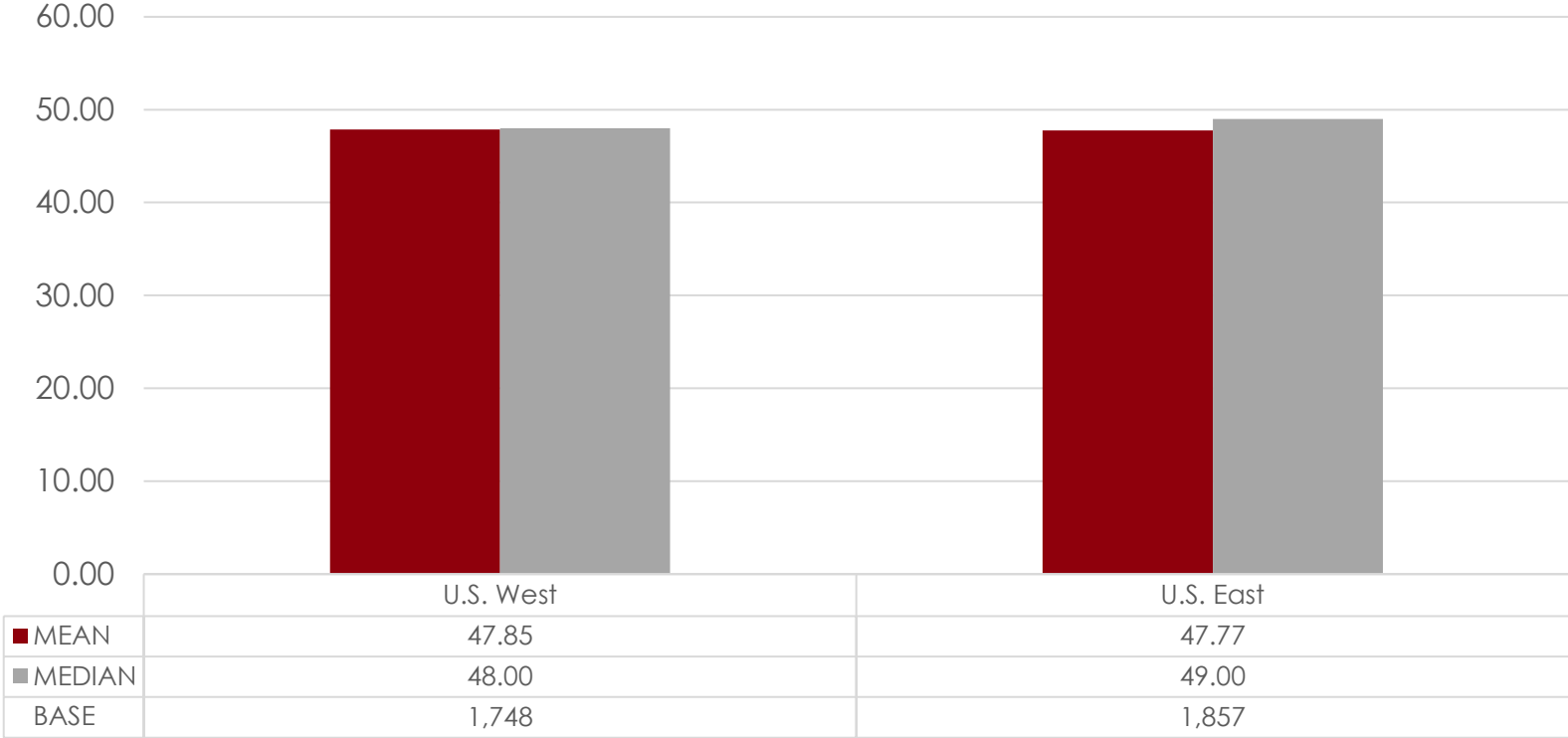


	U.S. West	U.S. East
■ Post-Graduate	31.3%	37.4%
■ College Grad	37.5%	37.3%
■ Associate Degree	9.2%	8.2%
■ Vocational/ Tech	3.5%	2.1%
■ Some College	12.9%	9.8%
■ High School Grad	5.2%	4.9%
■ Some / No High School	0.3%	0.3%
BASE	1,753	1,864

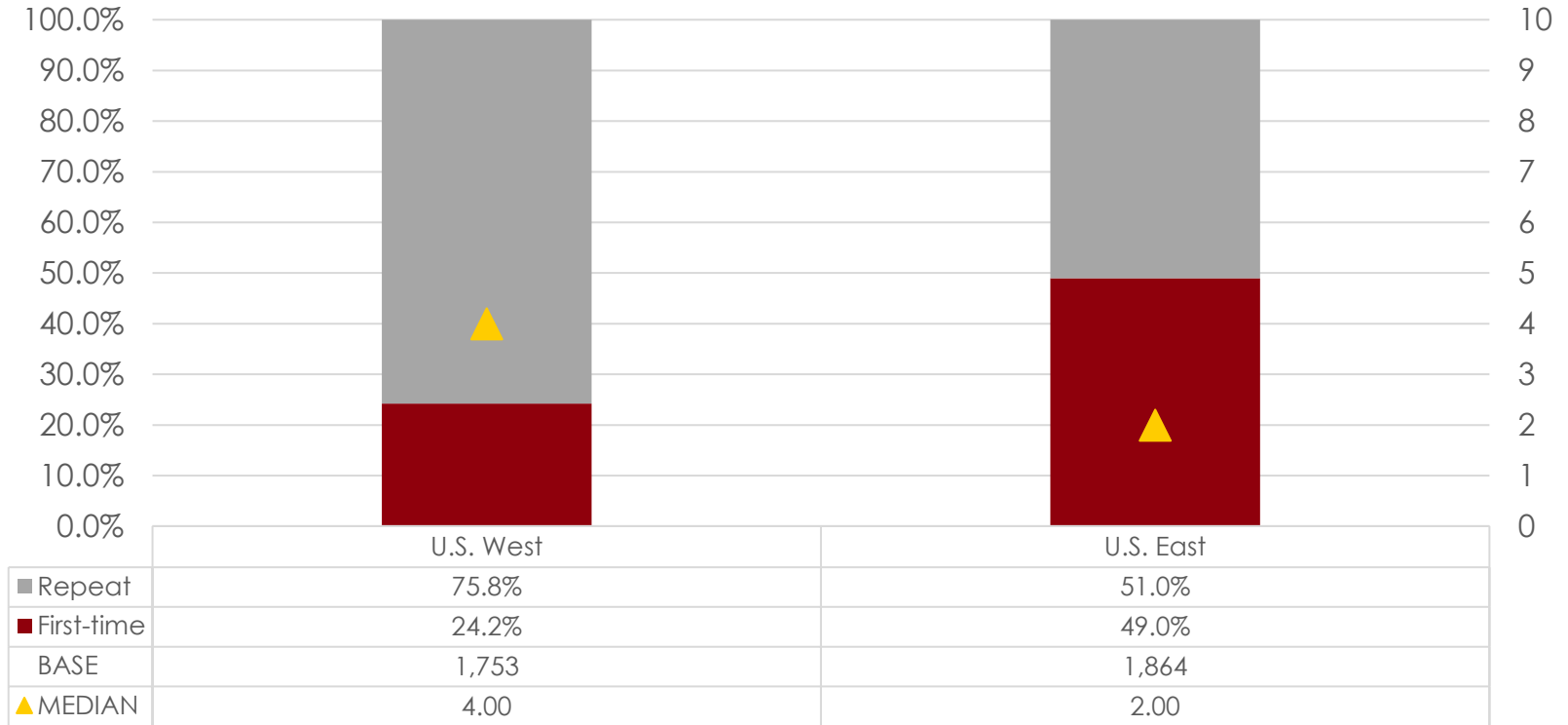
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	5.6%	6.0%
\$40,000 to \$59,999	7.8%	6.9%
\$60,000 to \$79,999	8.1%	9.6%
\$80,000 to \$99,999	9.9%	9.5%
\$100,000 to \$124,999	12.0%	11.6%
\$125,000 to \$149,999	11.7%	11.6%
\$150,000 to \$174,999	11.0%	10.7%
\$175,000 to \$199,999	7.7%	6.4%
\$200,000 to \$249,999	8.4%	9.4%
\$250,000 +	17.7%	18.3%

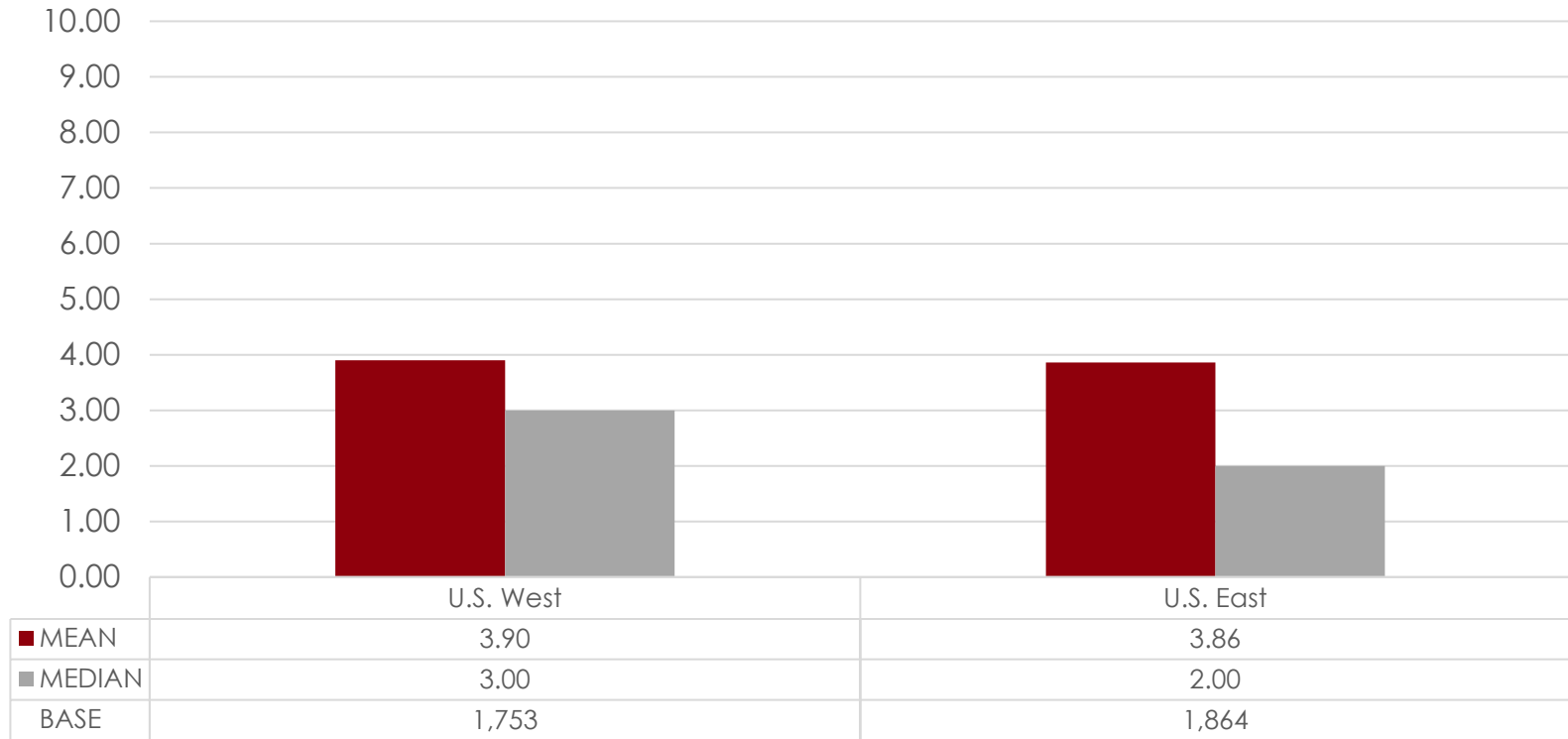
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAI‘I



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
Spouse	57.7%	58.2%
Other adult members of my family	33.3%	29.8%
Child/ grandchild under 18	32.0%	24.3%
Friends/ associates	17.5%	16.7%
Alone	6.9%	9.0%
Girlfriend/ boyfriend	8.5%	7.2%
Same gender partner	1.3%	1.1%

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.

Visitor market	Completed	Margin of Error \pm
U.S. West	768	3.54%
U.S. East	1,021	3.07%
All visitor markets	1,789	2.32%

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

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

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

Visitor market	Completed	Margin of Error \pm
U.S. West	274	5.92%
U.S. East	291	5.75%
All visitor markets	565	4.12%

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

Visitor market	Completed	Margin of Error \pm
U.S. West	554	4.16%
U.S. East	638	3.88%
All visitor markets	1,192	2.84%

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

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

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

Visitor market	Completed	Margin of Error \pm
U.S. West	307	5.59%
U.S. East	392	4.95%
All visitor markets	699	3.71%

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