



Hawai'i Tourism Authority
Marketing Effectiveness Study
Highlights

July – December 2021

Wave 5 Report

HTA Branding Standing Committee

Prepared by



Methodology

Target Audience/Markets

-
- Random sample of U.S., Canada, Japan, and Korea residents
- **U.S.: 1,202 sample**
 - Typically travel for leisure by air 500 miles or more in past 12 months with household income of \$75,000 or higher
 - U.S. West includes states of Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming
 - U.S. East includes all continental states not in U.S. West region
- **Canada: 601 sample**
 - Typically travel for leisure by air 500 miles or more in past 12 months with household income of \$75,000 CAD or higher.
- **Japan: 600 sample**
 - Typically travel internationally for leisure in past 24 months with household income of 3,999,000 Yen or higher.
- **Korea: 600 sample**
 - Typically travel internationally for leisure in past 24 months with household income of 30,000,000 won or higher.

Timeframe

- **Wave 5: Data collection January – March 2022 for marketing activities between July – December 2021**

Survey Methodology

- Online surveys taken by Prodege panelists
- Paid media consumption measured through recognition of ads via TV/video, untagged digital, and social media
- Owned media recognition of Hawai'i channels, including website, YouTube, Facebook, or Instagram
- Earned media recall of articles and stories

Key Takeaways

1

In the wake of the pandemic, vacationers seek “R&R”, less interested in new learnings, cultures

Compared to pre-pandemic times, vacations first and foremost continue to be about escape, rest and relaxation, but are also cited less often as opportunities to experience other cultures and learn new things. In selecting a leisure destination, travelers now prioritize safety/security, getting away from it all, and a sense of relaxation, while unique experiences/scenery and history/culture have become less important.

2

Fueled in part by pent-up travel demand, future travel interest in Hawai‘i exceeds pre-pandemic levels.

Interest in visiting Hawai‘i in the next 12 months has surpassed pre-pandemic levels within each of the Major Market Areas measured.

3

Top destination perceptions of Hawai‘i have shifted, though unique scenery and authentic experiences remain strong.

Compared to pre-pandemic measures, top destination perceptions of Hawai‘i have changed. Within its competitive set, Hawai‘i is now most strongly perceived as a destination with unique scenery, residents and visitors who follow health/safety guidelines, great shopping, minimal crowds, authentic experiences and ease of access to/from/within.

4

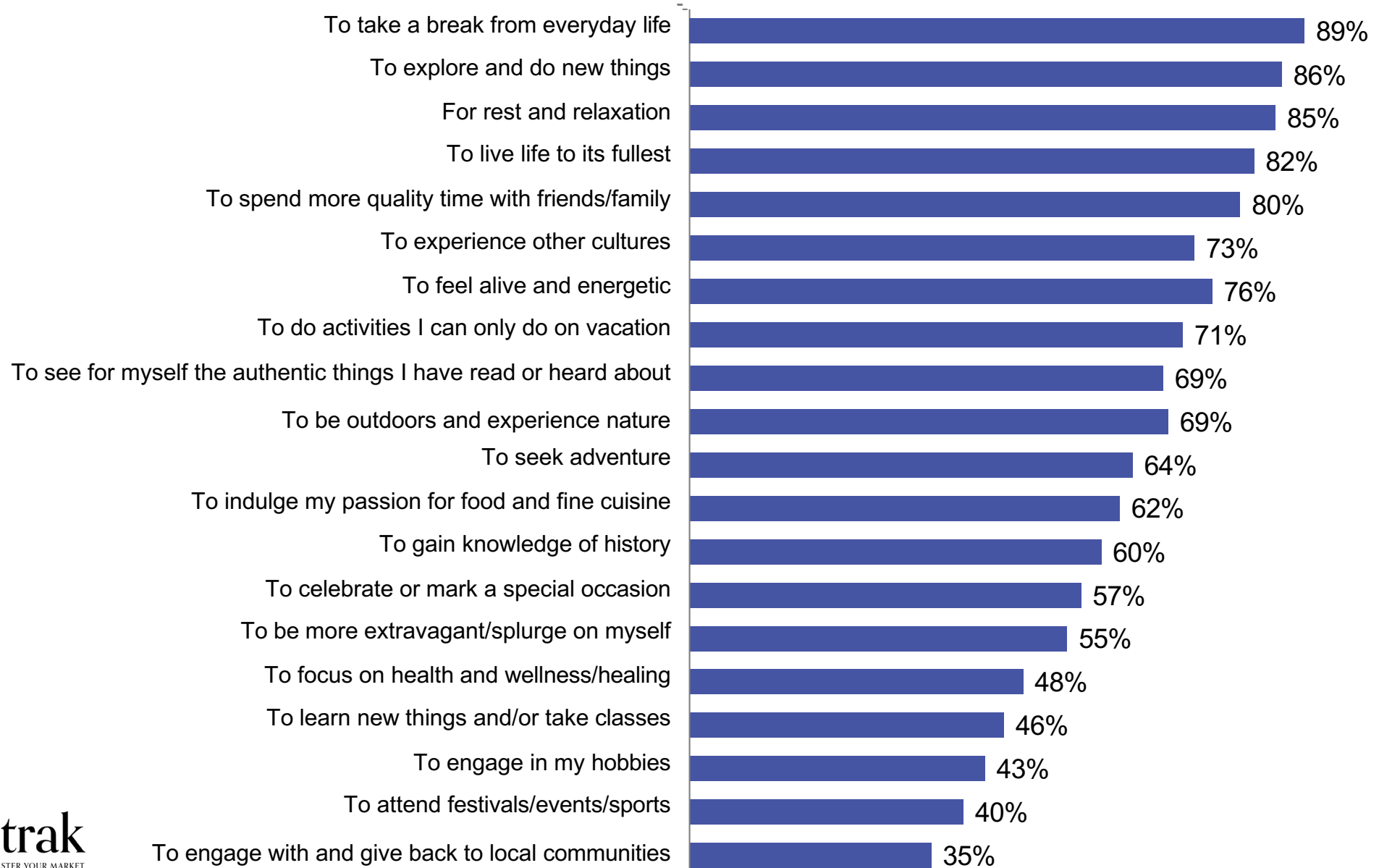
Hawai‘i IMC marketing boosts sustainability, history/culture brand perceptions of the state

Awareness of Hawai‘i’s Integrated Marketing Campaigns (IMC’s) strengthens perceptions of the state as a destination with sustainable practices, history and culture rather than being simply a great getaway, a place of relaxation. Moving forward, IMC efforts should continue to build destination perceptions in these areas to attract a visitor more attuned with the state’s regenerative offerings.

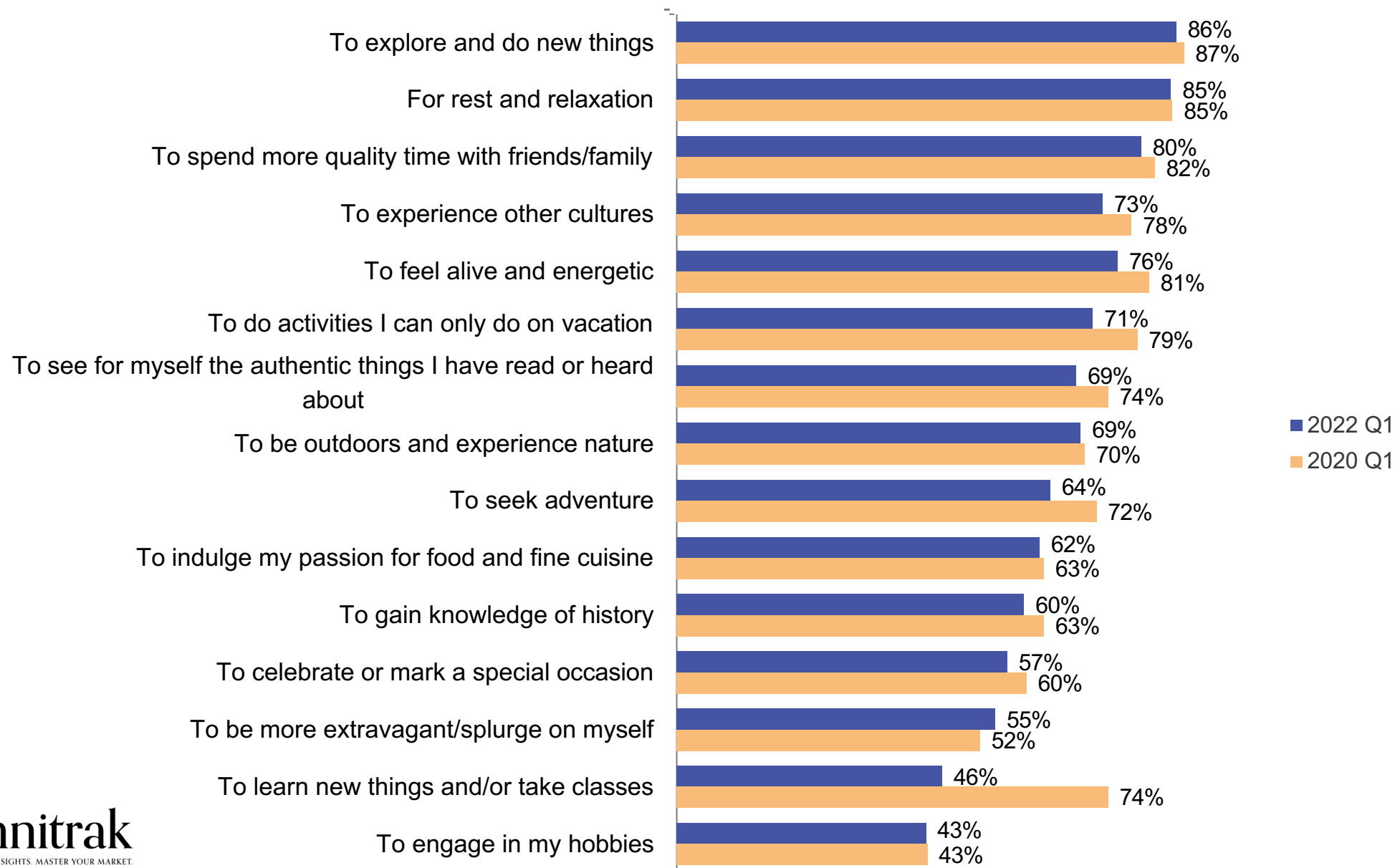
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Summary of Market – U.S.

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important (Total US)



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important (Total US)



Top Destination Selection Attributes – U.S. West & US East

| US West | 2022 Qtr 1 | 2020 Qtr 1 | DIFF |
|--|------------|------------|---------|
| Safe and secure | 89% | 88% | +1 pt |
| Great place to get away from day-to-day life | 84% | 83% | +1 pt |
| Welcoming/open to people like me | 80% | - - | NA |
| Clean environment | 79% | 78% | +1 pt |
| Sense of relaxation, a place to unwind and re-energize | 79% | 82% | -3 pts |
| Authentic experiences | 78% | 83% | -5 pts |
| Friendly local people | 77% | 81% | -4 pts |
| Offers a different experience than other places | 77% | 81% | -4 pts |
| Residents and visitors follow health/safety guidelines | 76% | - - | NA |
| Unique scenery unlike anywhere else | 76% | 82% | - 6 pts |
| Variety of unique experiences and activities | 75% | 82% | -7 pts |
| Good value for the money | 74% | 77% | - 3 pts |
| Opportunities to discover new activities and experiences | 74% | 75% | - 1 pt |
| History and culture are intriguing | 72% | 78% | - 6 pts |
| Has consistent/dependable experiences | 71% | 80% | - 9 pts |

| US East | 2022 Qtr 1 | 2020 Qtr 1 | DIFF |
|--|------------|------------|---------|
| Safe and secure | 91% | 85% | +6 pts |
| Great place to get away from day-to-day life | 88% | 83% | +5 pts |
| Sense of relaxation, a place to unwind and re-energize | 84% | 79% | +5 pts |
| Welcoming/open to people like me | 81% | - - | NA |
| Clean environment | 81% | 79% | +2 pts |
| Authentic experiences | 80% | 81% | -1 pt |
| Good value for the money | 79% | 75% | +4 pts |
| Variety of unique experiences and activities | 79% | 81% | -2 pts |
| Offers a different experience than other places | 77% | 80% | -3 pts |
| Friendly local people | 77% | 75% | +2 pts |
| Unique scenery unlike anywhere else | 77% | 76% | +1 pt |
| Has consistent/dependable experiences | 76% | 74% | +2 pts |
| Easy to navigate and get around | 76% | 74% | + 2 pts |
| Opportunities to discover new activities and experiences | 75% | 73% | +2 pts |
| Residents and visitors follow health/safety guidelines | 74% | - - | NA |

Destinations Considering/Planning to Visit – U.S. West

Considering for Next Overnight Vacation

| | | U.S. West | |
|----|-----------------------|-----------|---------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Hawai'i | 55% | 53% |
| 2 | Mexico | 28% | 31% |
| 3 | Italy | 27% | 27% |
| 4 | Caribbean | 30% | 27% |
| 5 | Alaska | -- | 26% |
| 6 | United Kingdom | 27% | 22% |
| 7 | France | 26% | 20% |
| 8 | Australia | 27% | 19% |
| 9 | Other Europe | 17% | 18% |
| 10 | Central/South America | 16% | 16% |
| 11 | Switzerland | 19% | 13% |
| 12 | Southeast Asia | 15% | 13% |
| 13 | Germany | 19% | 12% |
| | Other | -- | 13% |
| | Not Considering | -- | 5% |

Planning to Visit in Next 12 Months

| | | U.S. West | |
|----|-----------------------|-----------|---------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Hawai'i | 31% | 42% |
| 2 | Mexico | 11% | 21% |
| 3 | Alaska | 13% | 17% |
| 4 | Caribbean | 11% | 13% |
| 5 | United Kingdom (UK) | 11% | 12% |
| 6 | France | 9% | 11% |
| 7 | Italy | 8% | 11% |
| 8 | Other Europe | 5% | 10% |
| 9 | Switzerland | 6% | 7% |
| 10 | Central/South America | 6% | 7% |
| 11 | Australia | 7% | 7% |
| 12 | Germany | 5% | 6% |
| 13 | Southeast Asia | 4% | 6% |
| | Other | -- | 14% |
| | Not Considering | -- | 12% |

Destinations Considering/Planning to Visit – U.S. East

Considering for Next Overnight Vacation

| U.S. East | | | |
|-----------|-----------------------|------------|------------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Florida | 45% | 49% |
| 2 | Hawai'i | 40% | 37% |
| 3 | California | | |
| 4 | Caribbean | 34% | 35% |
| 5 | Mexico | 21% | 23% |
| 6 | Italy | 25% | 22% |
| 7 | United Kingdom | 25% | 21% |
| 8 | France | 18% | 18% |
| 9 | Germany | 14% | 13% |
| 10 | Switzerland | 14% | 13% |
| 11 | Central/South America | 13% | 12% |
| 12 | Other Europe | 13% | 12% |
| 13 | Puerto Rico | | 12% |
| 14 | Bermuda | 13% | 11% |
| 15 | Iceland | | |
| 16 | Southeast Asia | 7% | |
| | | | 5% |
| | Other | -- | 12% |
| | | -- | |

Planning to Visit in Next 12 Months

| U.S. East | | | |
|-----------|-----------------------|------------|------------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Florida | 29% | 42% |
| 2 | California | 15% | 24% |
| 3 | Hawai'i | 15% | 23% |
| 4 | Caribbean | 15% | 19% |
| 5 | Mexico | 8% | 14% |
| 6 | France | 7% | 10% |
| 7 | United Kingdom (UK) | 10% | 10% |
| 8 | Italy | 10% | 10% |
| 9 | Other Europe | 5% | 8% |
| 10 | Germany | 4% | 7% |
| 11 | Puerto Rico | 6% | 7% |
| 12 | Central/South America | 4% | 6% |
| 13 | Switzerland | 5% | 6% |
| 14 | Bermuda | 4% | 5% |
| 15 | Southeast Asia | 4% | 3% |
| 16 | Iceland | 4% | 3% |
| 17 | Cuba | 1% | 2% |
| | Other | | 13% |
| | Not Considering | -- | 9% |

Hawai'i's Top Destination Attributes vs Competitor Destinations – U.S. West

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

| | Hawai'i | Europe | Caribbean | Southeast Asia | Mexico | Australia | Alaska | Central America |
|--|---------|--------|-----------|----------------|--------|-----------|--------|-----------------|
| 1 Residents/visitors follow health/safety guidelines | 75% | 20% | 54% | 16% | 34% | 23% | 23% | 15% |
| 2 Easy to get there | 72% | 38% | 54% | 30% | 41% | 35% | 39% | 27% |
| 3 Great shopping | 70% | 48% | 46% | 14% | 22% | 17% | 16% | 11% |
| 4 Friendly local people | 67% | 45% | 35% | 22% | 25% | 37% | 39% | 16% |
| 5 Quality culinary and dining experiences | 67% | 26% | 33% | 15% | 25% | 26% | 25% | 11% |
| 6 Romantic | 65% | 34% | 18% | 11% | 11% | 41% | 49% | 10% |
| 7 Authentic experiences | 64% | 42% | 39% | 30% | 37% | 45% | 42% | 24% |
| 8 Unique scenery | 62% | 44% | 47% | 43% | 32% | 49% | 57% | 33% |
| 9 Easy to navigate and get around | 61% | 29% | 24% | 11% | 9% | 38% | 50% | 9% |
| 10 Minimal crowds/not busy | 59% | 57% | 48% | 53% | 44% | 51% | 52% | 42% |

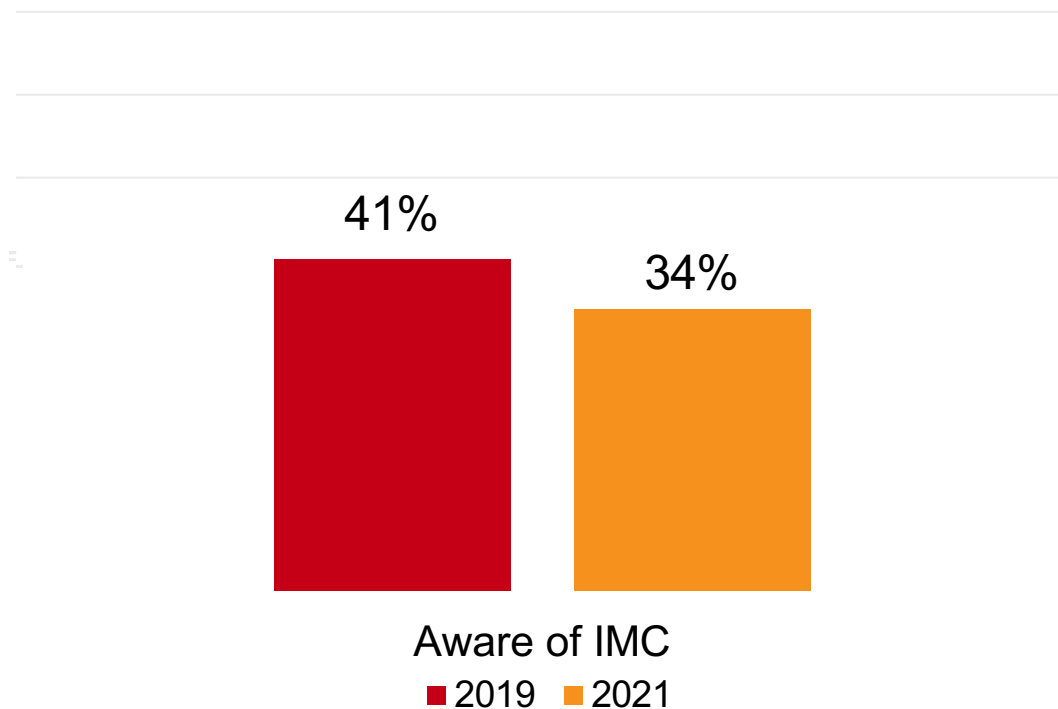
Hawai'i's Top Destination Attributes vs Competitor Destinations – U.S. East

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

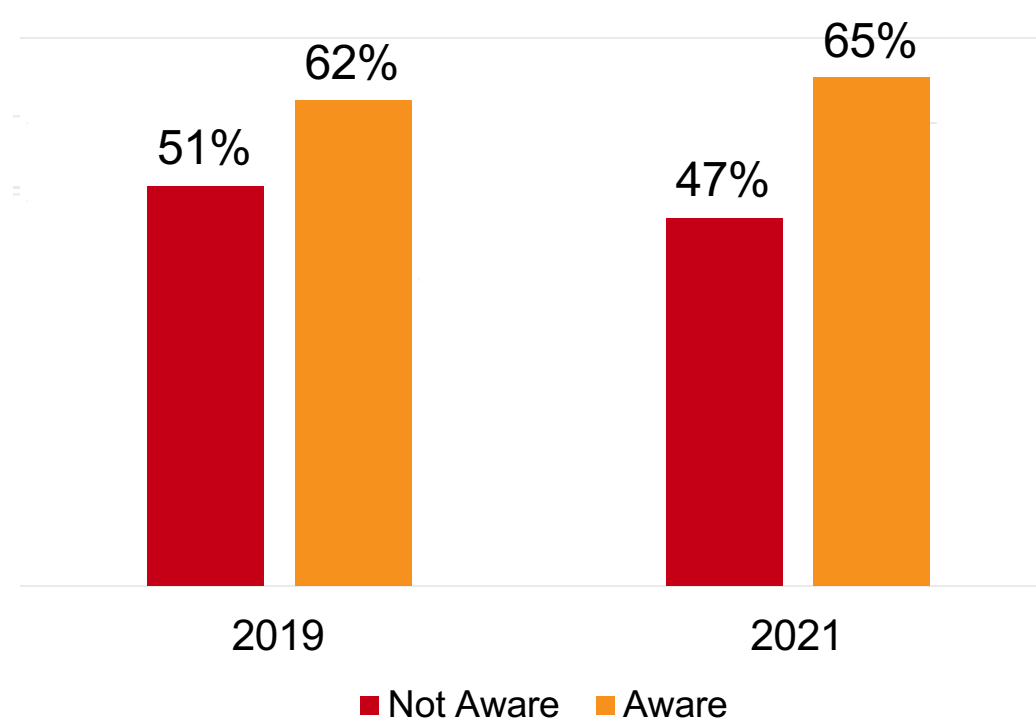
| | Hawai'i | Europe | Caribbean | Mexico | Central America | Florida | Puerto Rico | California | South America |
|--|---------|--------|-----------|--------|-----------------|---------|-------------|------------|---------------|
| 1 Unique scenery | 66% | 45% | 45% | 36% | 34% | 22% | 29% | 28% | 36% |
| 2 Residents and visitors follow health/safety guidelines | 61% | 21% | 53% | 32% | 16% | 42% | 24% | 30% | 13% |
| 3 Easy to get there | 61% | 36% | 51% | 34% | 24% | 40% | 29% | 31% | 25% |
| 4 Great shopping | 60% | 43% | 47% | 19% | 10% | 18% | 18% | 20% | 12% |
| 5 Easy to navigate and get around | 53% | 24% | 25% | 11% | 11% | 29% | 11% | 29% | 10% |
| 6 Has consistent/dependable experiences | 53% | 52% | 45% | 41% | 35% | 40% | 34% | 39% | 37% |
| 7 Family-friendly/activities for children | 53% | 37% | 45% | 46% | 41% | 16% | 40% | 14% | 42% |
| 8 Minimal crowds/not busy | 52% | 52% | 45% | 40% | 38% | 34% | 34% | 37% | 39% |
| 9 Authentic experiences | 52% | 34% | 41% | 30% | 20% | 50% | 27% | 43% | 20% |
| 10 Sense of relaxation, place to unwind and re-energize | 49% | 51% | 41% | 41% | 33% | 25% | 32% | 24% | 38% |

US West: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

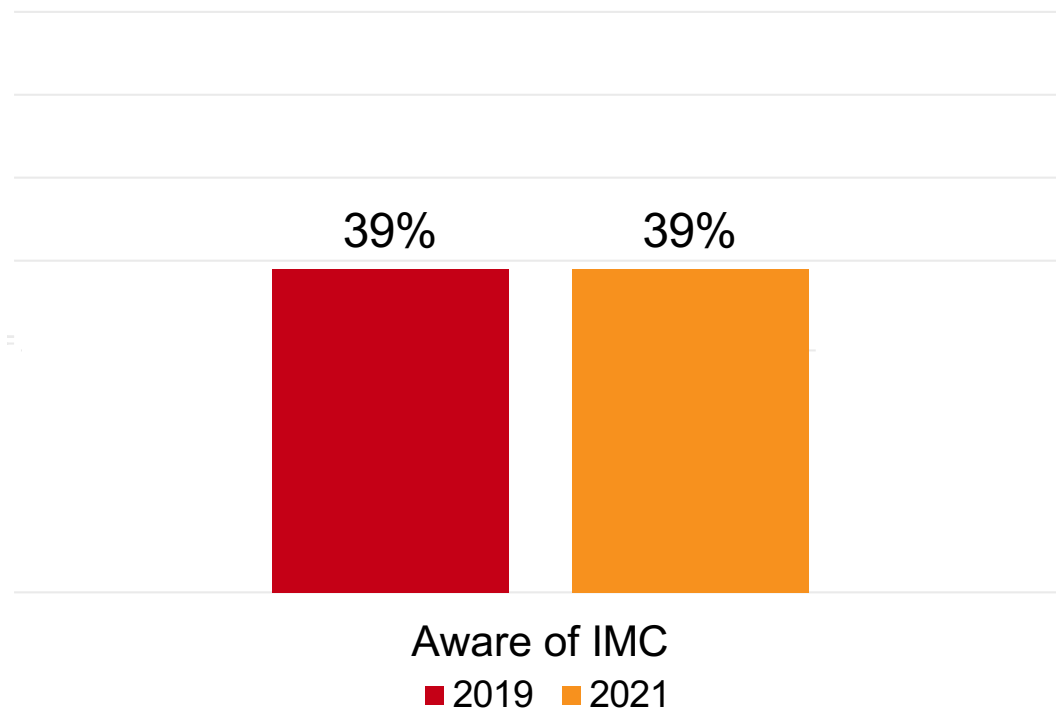


Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)

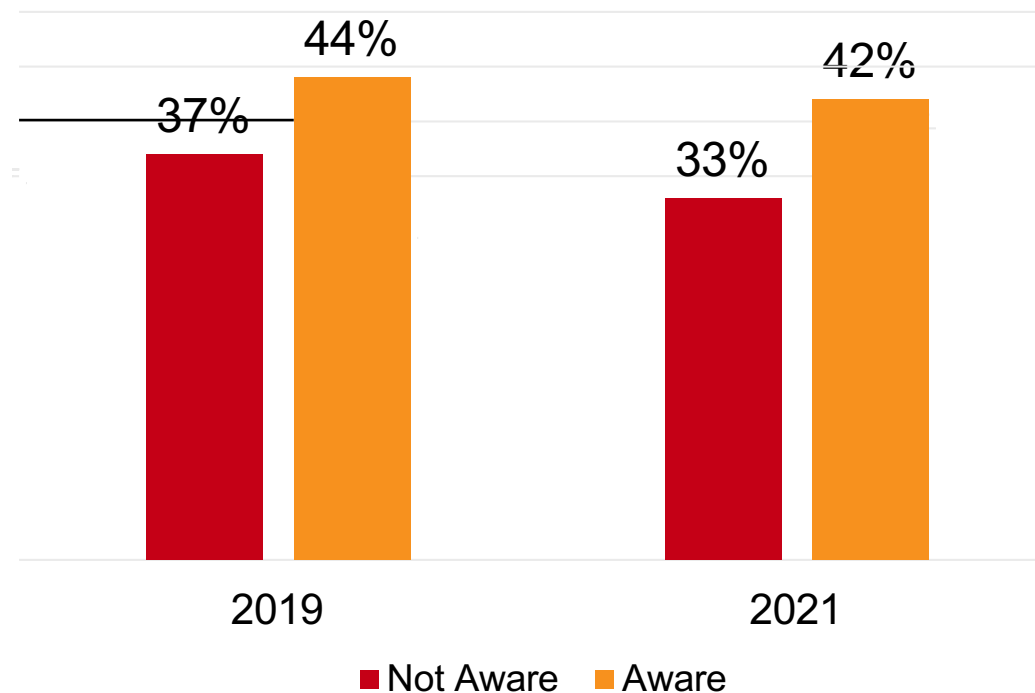


US East: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

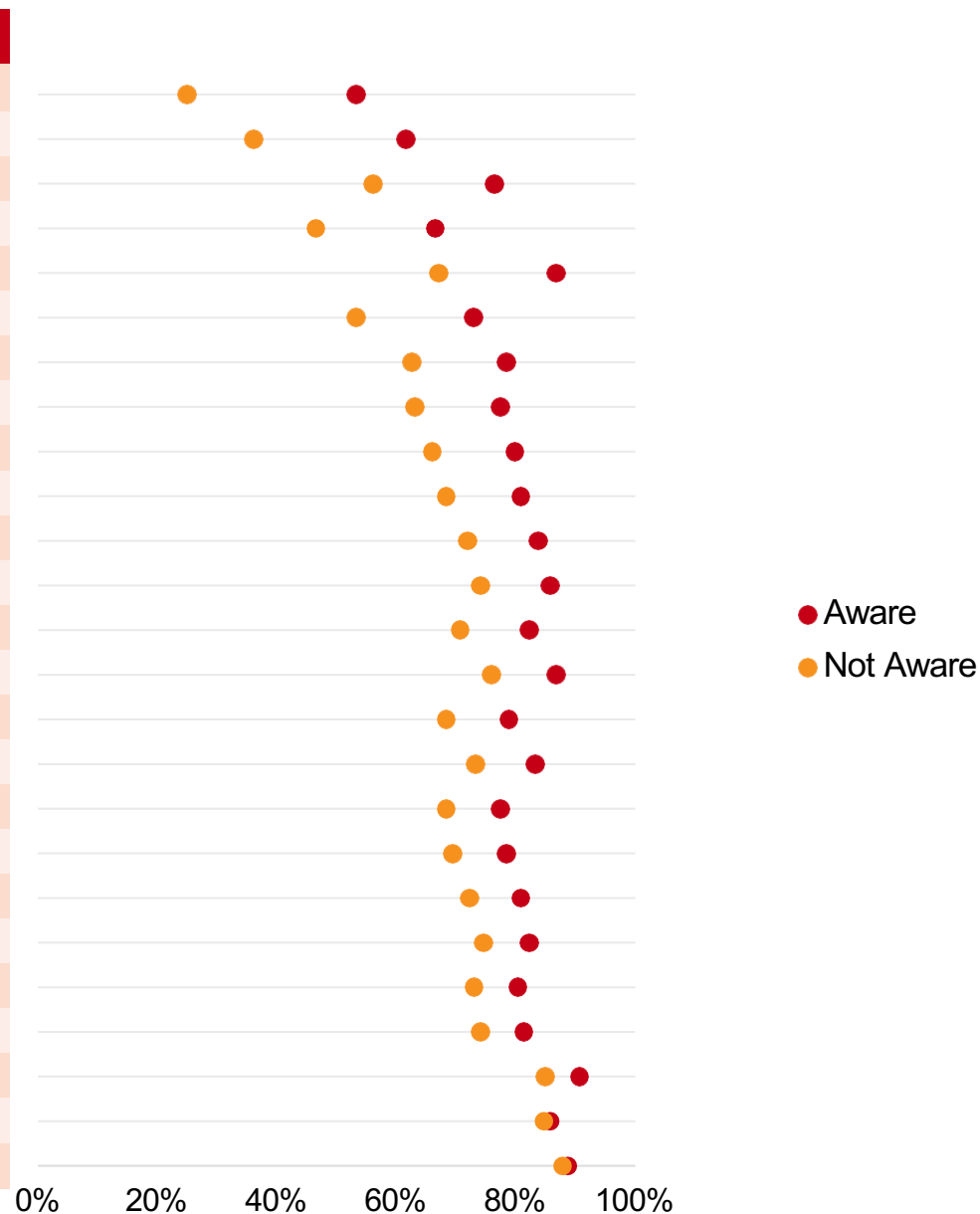


Impact on Travel Intentions (% Considering Hawai'i for Next Vacation)



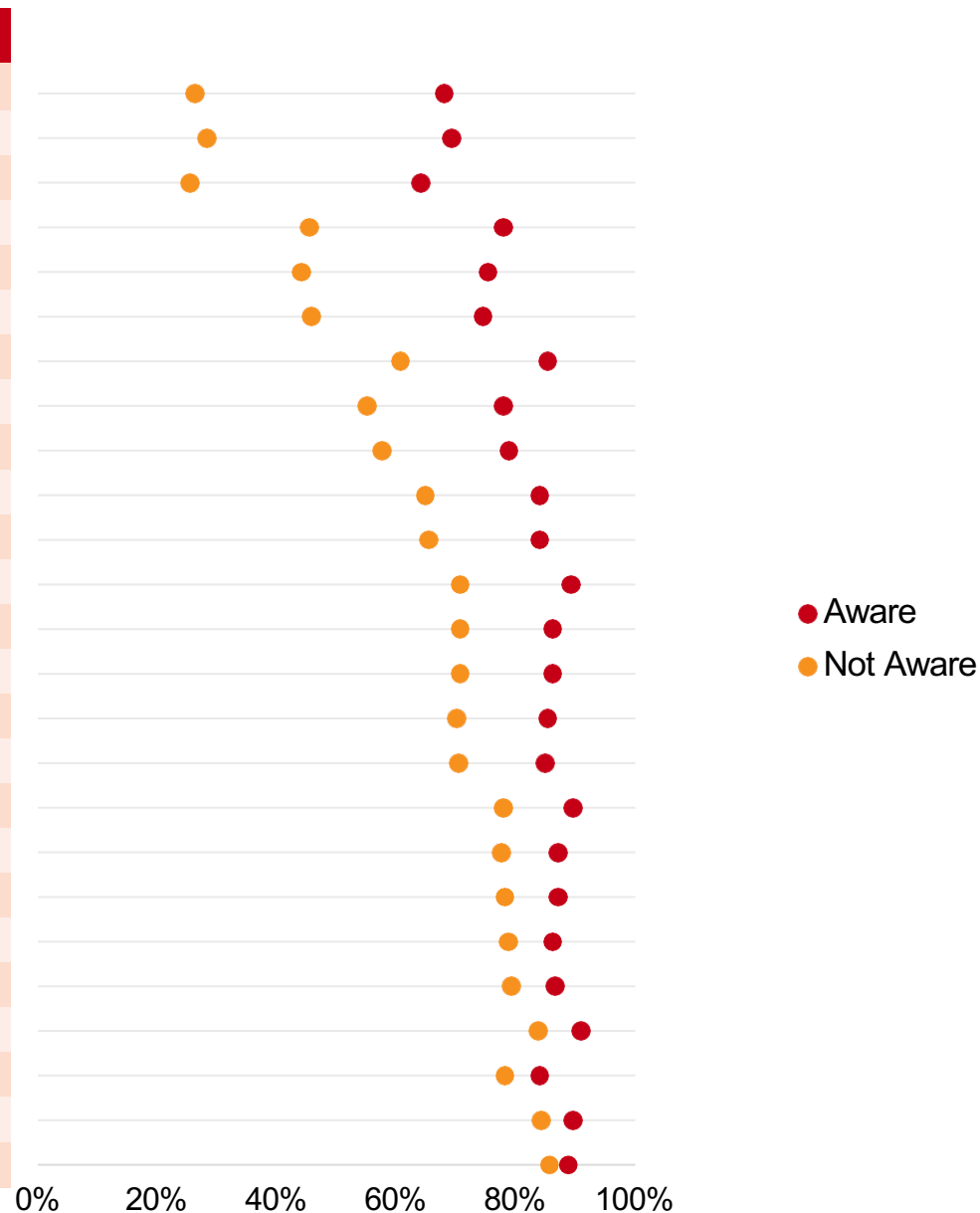
Marketing Impact on Hawai'i's Destination Attributes – U.S. West

| Destination Attribute | Difference |
|--|------------|
| Minimal crowds/not busy | +28 pts |
| Good value for the money | +25 pts |
| Easy to get there | +20 pts |
| Great shopping | +20 pts |
| History and culture are intriguing | +20 pts |
| Has sustainable practices | +20 pts |
| Easy to navigate and get around | +16 pts |
| Residents and visitors follow health/safety guidelines | +14 pts |
| Historic and cultural offerings | +14 pts |
| Family-friendly/activities for children | +12 pts |
| Welcoming/open to people like me | +12 pts |
| Variety of unique experiences and activities | +12 pts |
| Offers experiences with native people and their culture | +12 pts |
| Romantic | +11 pts |
| Quality culinary and dining experiences | +11 pts |
| Opportunities to discover new activities and experiences | +10 pts |
| Offers a different experience than other places | +9 pts |
| Friendly local people | +9 pts |
| Authentic experiences | +9 pts |
| Safe and secure | +8 pts |
| Clean environment | +7 pts |
| Has consistent/dependable experiences | +7 pts |
| Great place to get away from day-to-day life | +6 pts |
| Unique scenery unlike anywhere else | +1 pts |
| Sense of relaxation, a place to unwind and re-energize | +1 pts |

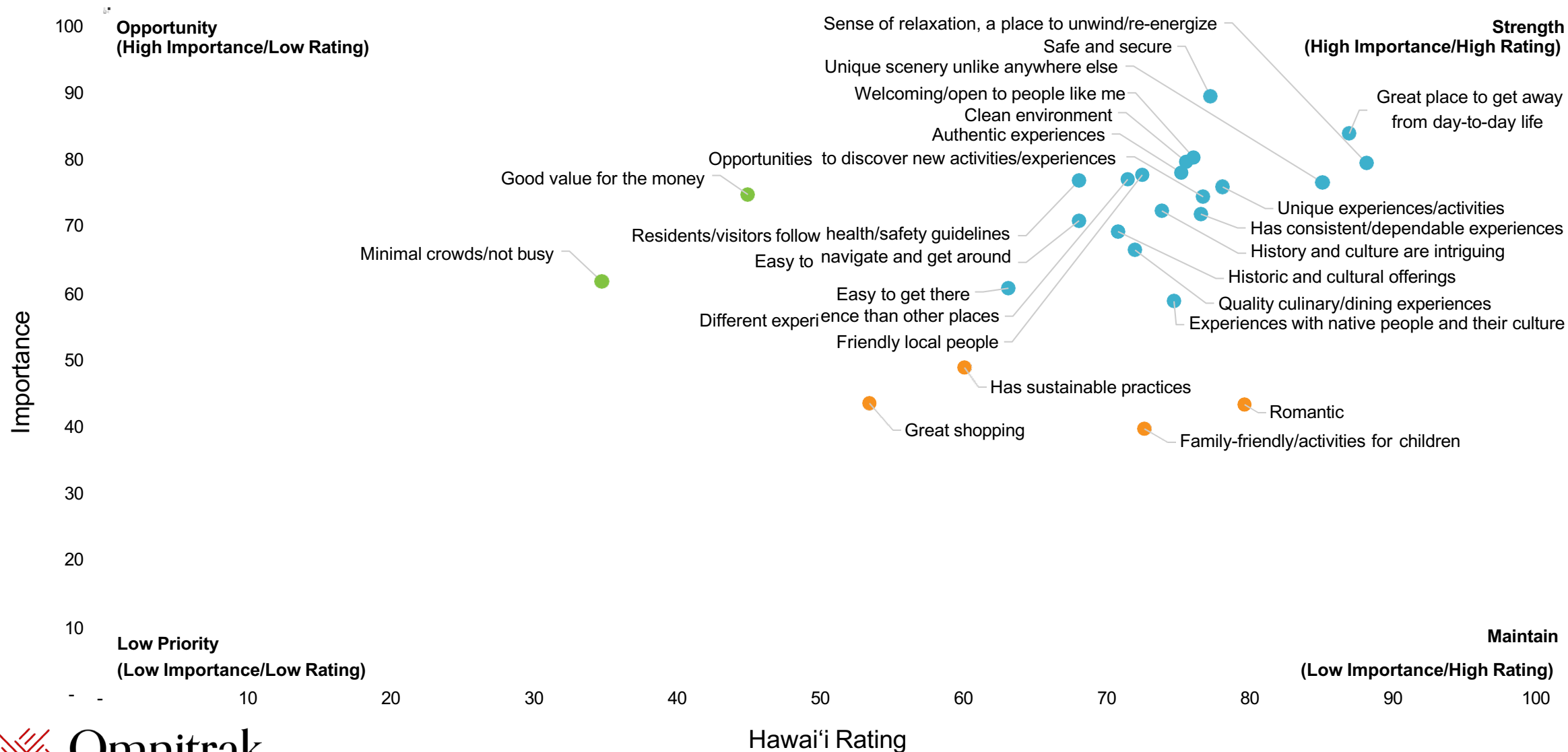


Marketing Impact on Hawai'i's Destination Attributes – U.S. East

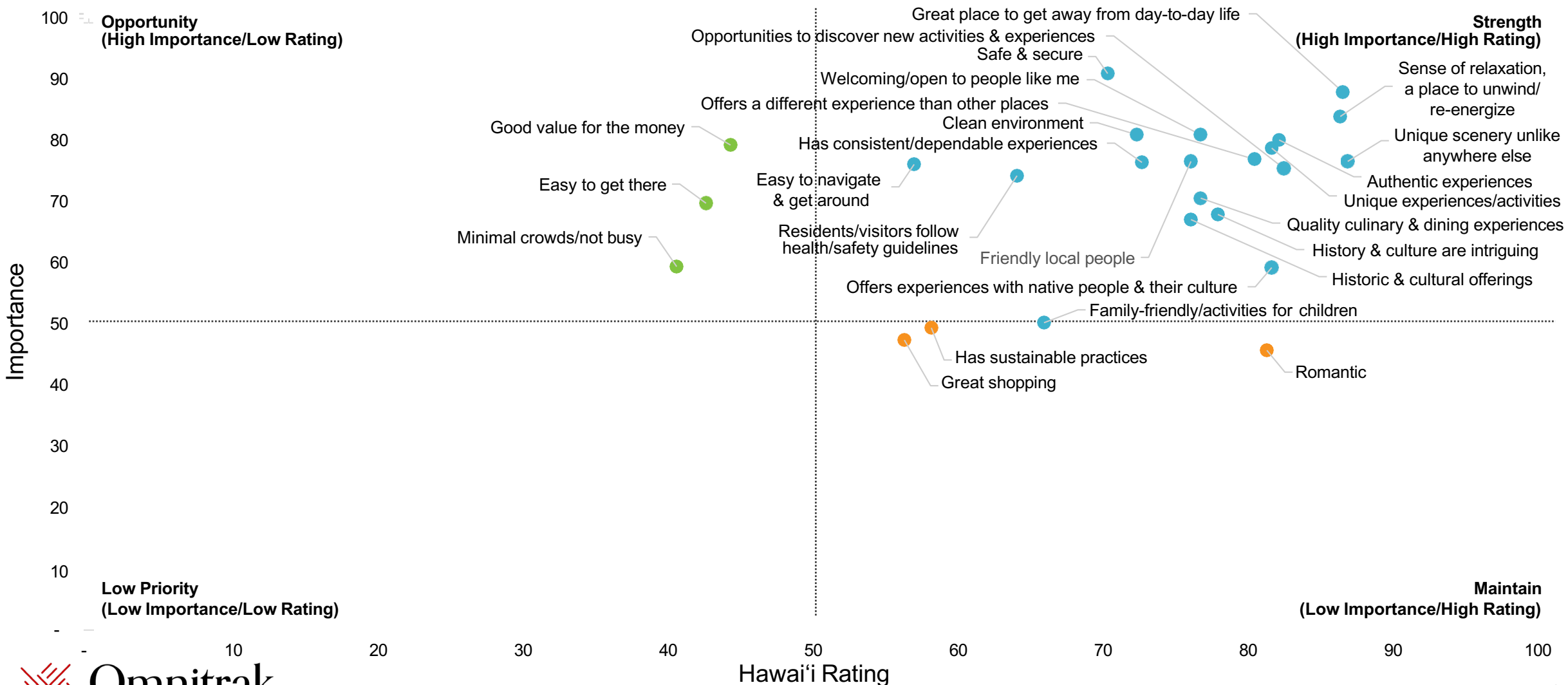
| Destination Attribute | Difference |
|--|------------|
| Easy to get there | +42 pts |
| Good value for the money | +41 pts |
| Minimal crowds/not busy | +39 pts |
| Has sustainable practices | +32 pts |
| Great shopping | +31 pts |
| Easy to navigate and get around | +29 pts |
| Safe and secure | +25 pts |
| Residents and visitors follow health/safety guidelines | +23 pts |
| Family-friendly/activities for children | +21 pts |
| Clean environment | +19 pts |
| Has consistent/dependable experiences | +19 pts |
| History and culture are intriguing | +19 pts |
| Quality culinary and dining experiences | +16 pts |
| Welcoming/open to people like me | +16 pts |
| Historic and cultural offerings | +15 pts |
| Friendly local people | +14 pts |
| Opportunities to discover new activities and experiences | +12 pts |
| Romantic | +9 pts |
| Offers experiences with native people and their culture | +9 pts |
| Variety of unique experiences and activities | +7 pts |
| Authentic experiences | +7 pts |
| Great place to get away from day-to-day life | +7 pts |
| Offers a different experience than other places | +6 pts |
| Sense of relaxation, a place to unwind and re-energize | +5 pts |
| Unique scenery unlike anywhere else | +3 pts |



Destination Attributes – Importance vs Hawai'i Rating – U.S. West



Destination Attributes – Importance vs Hawai'i Rating – U.S. East



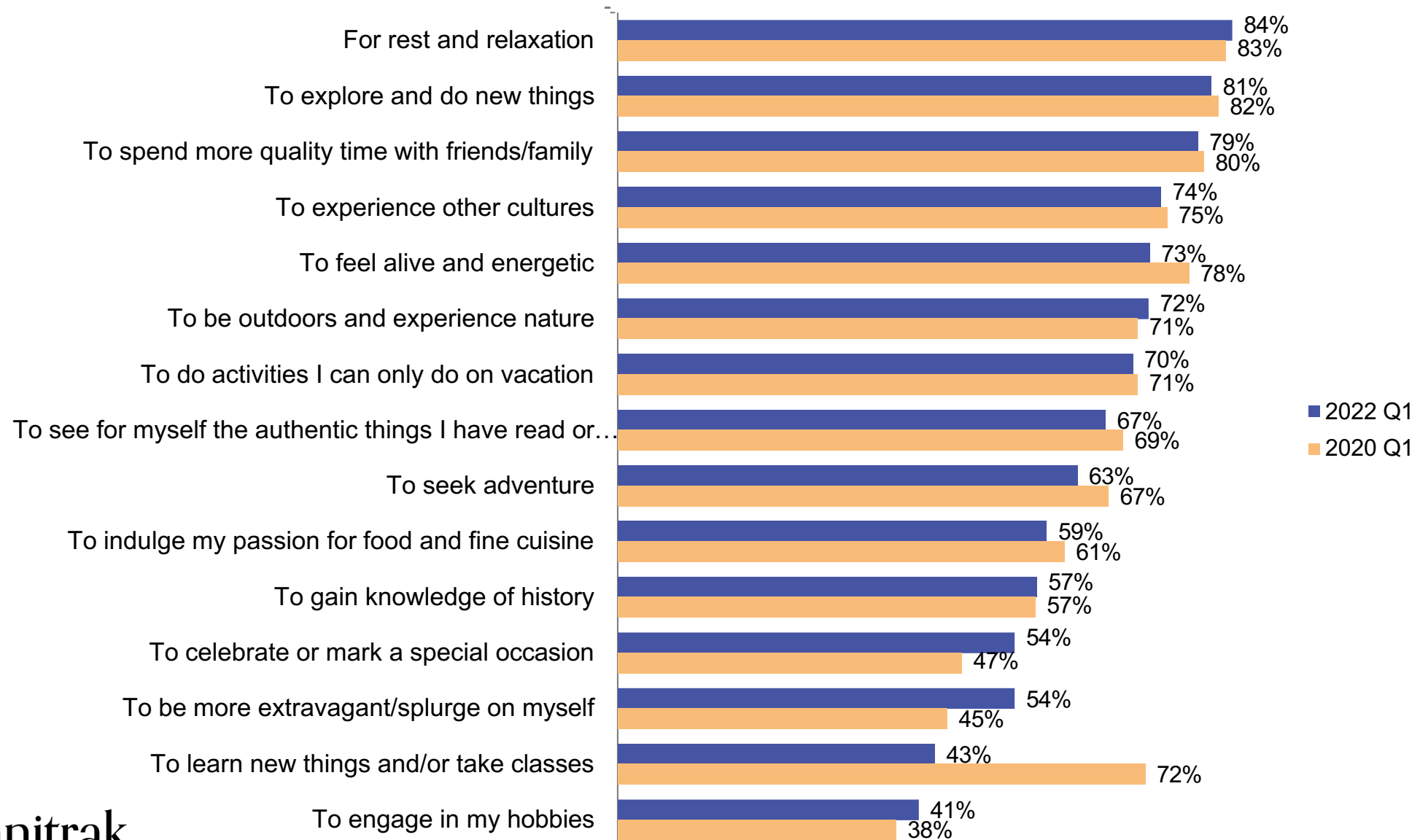
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Summary of Markets – Canada

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Top Destination Selection Attributes - Canada

| Canada | 2022 Qtr 1 | 2020 Qtr 1 | DIFF |
|--|---------------|---------------|---------|
| Safe and secure | 88% | 88% | -- |
| Great place to get away from day-to-day life | 84% | 79% | + 5 pts |
| Sense of relaxation, a place to unwind and re-energize | 80% | 80% | -- |
| Welcoming/open to people like me | 80% | | NA |
| Clean environment | 79% | 75% | +4 pts |
| Good value for the money | 78% | 77% | +1 pt |
| Authentic experiences | 76% | 77% | -1 pt |
| Residents and visitors follow health/safety guidelines | 76% | -- | NA |
| Friendly local people | 74% | 78% | -4 pts |
| Opportunities to discover new activities and experiences | 73% | 71% | +2 pts |
| Has consistent/dependable experiences | 73% | 73% | -- |
| Variety of unique experiences and activities | 73% | 80% | -7 pts |
| Offers a different experience than other places | 73% | 75% | -2 pts |
| Easy to navigate and get around | 73% | 70% | +3 pts |
| Unique scenery unlike anywhere else | 70% | 76% | -6 pts |

Destinations Considering/Planning to Visit – Canada

Considering for Next Overnight Vacation

| | | Canada | |
|---|-----------------|------------|------------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Europe | 44% | 46% |
| 2 | Hawai'i | 36% | 42% |
| 3 | Caribbean | 38% | 39% |
| 4 | California | 35% | 38% |
| 5 | Florida | 35% | 37% |
| 6 | Mexico | 32% | 36% |
| 7 | Las Vegas | 30% | 31% |
| 8 | Arizona | 13% | 12% |
| | Other | -- | 8% |
| | Not Considering | -- | 3% |

Planning to Visit in Next 12 Months

| | | Canada | |
|---|-----------------|------------|------------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Europe | 22% | 31% |
| 2 | Hawai'i | 13% | 23% |
| 3 | California | 15% | 22% |
| 4 | Florida | 15% | 20% |
| 5 | Mexico | 12% | 19% |
| 6 | Caribbean | 17% | 18% |
| 7 | Las Vegas | 12% | 16% |
| 8 | Arizona | 6% | 7% |
| | Other | -- | 8% |
| | Not Considering | -- | 15% |

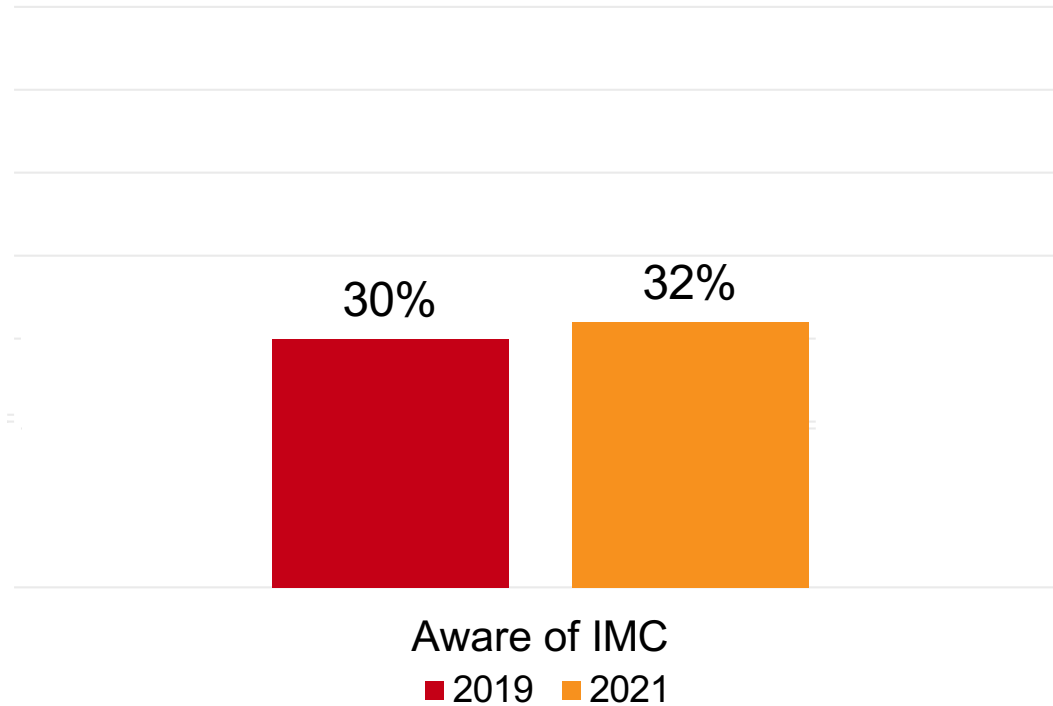
Hawai'i's Top Destination Attributes vs Competitor Destinations

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

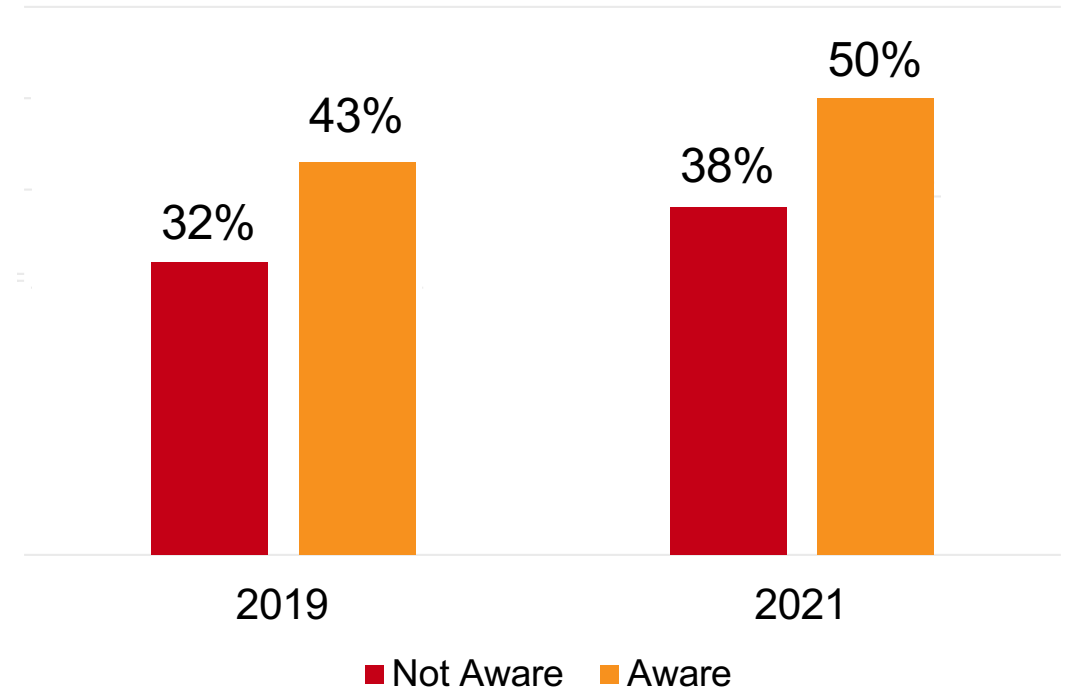
| | Hawai'i | California | Florida | Arizona | Mexico | Caribbean | Las Vegas | Europe |
|--|---------|------------|---------|---------|--------|-----------|-----------|--------|
| 1 Unique scenery unlike anywhere else | 64% | 27% | 20% | 29% | 40% | 47% | 18% | 56% |
| 2 Residents and visitors follow health/safety guidelines | 64% | 28% | 33% | 19% | 43% | 54% | 15% | 27% |
| 3 Family-friendly/activities for children | 57% | 12% | 14% | 11% | 52% | 47% | 9% | 42% |
| 4 Easy to get there | 56% | 32% | 35% | 24% | 43% | 50% | 32% | 43% |
| 5 Great shopping | 56% | 21% | 16% | 10% | 26% | 42% | 14% | 56% |
| 6 Minimal crowds/not busy | 55% | 34% | 28% | 25% | 45% | 48% | 30% | 60% |
| 7 Has consistent/dependable experiences | 54% | 38% | 36% | 25% | 46% | 46% | 40% | 62% |
| 8 Sense of relaxation, a place to unwind and re-energize | 53% | 25% | 25% | 21% | 44% | 43% | 24% | 62% |
| 9 Authentic experiences | 52% | 40% | 37% | 29% | 42% | 49% | 37% | 43% |
| 10 Easy to navigate and get around | 52% | 28% | 23% | 23% | 15% | 28% | 17% | 33% |

Canada: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

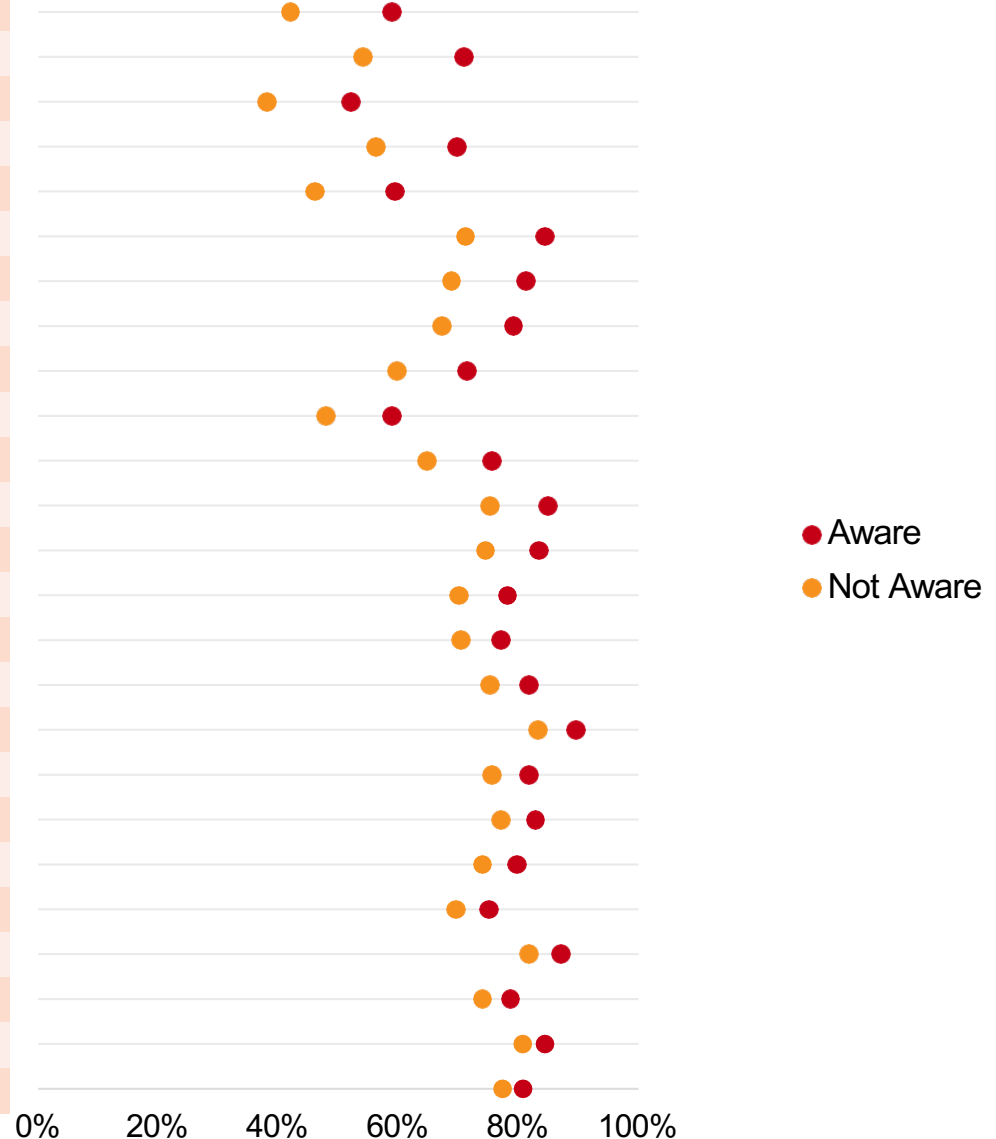


Impact on Travel Intentions (%Considering Hawai'i for Next Vacation)

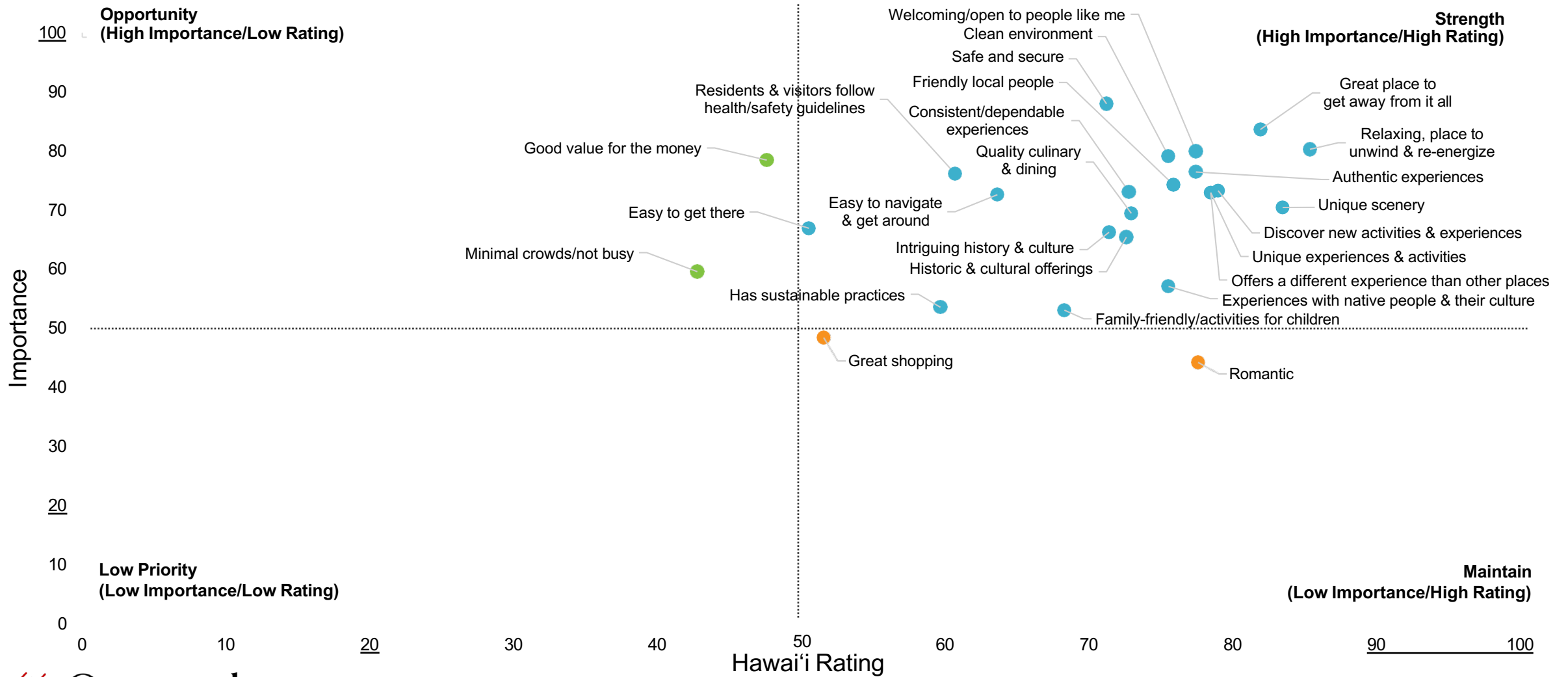


Marketing Impact on Hawai'i's Destination Attributes

| Destination Attribute | Difference |
|--|------------|
| Good value for the money | +17 pts |
| Has sustainable practices | +17 pts |
| Minimal crowds/not busy | +14 pts |
| Residents and visitors follow health/safety guidelines | +14 pts |
| Easy to get there | +13 pts |
| Clean environment | +13 pts |
| Quality culinary and dining experiences | +12 pts |
| Safe and secure | +12 pts |
| Easy to navigate and get around | +12 pts |
| Great shopping | +11 pts |
| Family-friendly/activities for children | +11 pts |
| Offers a different experience than other places | +10 pts |
| Welcoming/open to people like me | +9 pts |
| Has consistent/dependable experiences | +8 pts |
| Historic and cultural offerings | +7 pts |
| Authentic experiences | +7 pts |
| Sense of relaxation, a place to unwind and re-energize | +6 pts |
| Romantic | +6 pts |
| Opportunities to discover new activities and experiences | +6 pts |
| Friendly local people | +6 pts |
| History and culture are intriguing | +5 pts |
| Unique scenery unlike anywhere else | +5 pts |
| Offers experiences with native people and their culture | +5 pts |
| Great place to get away from day-to-day life | +4 pts |
| Variety of unique experiences and activities | +3 pts |



Destination Attributes – Importance vs Hawai‘i Rating



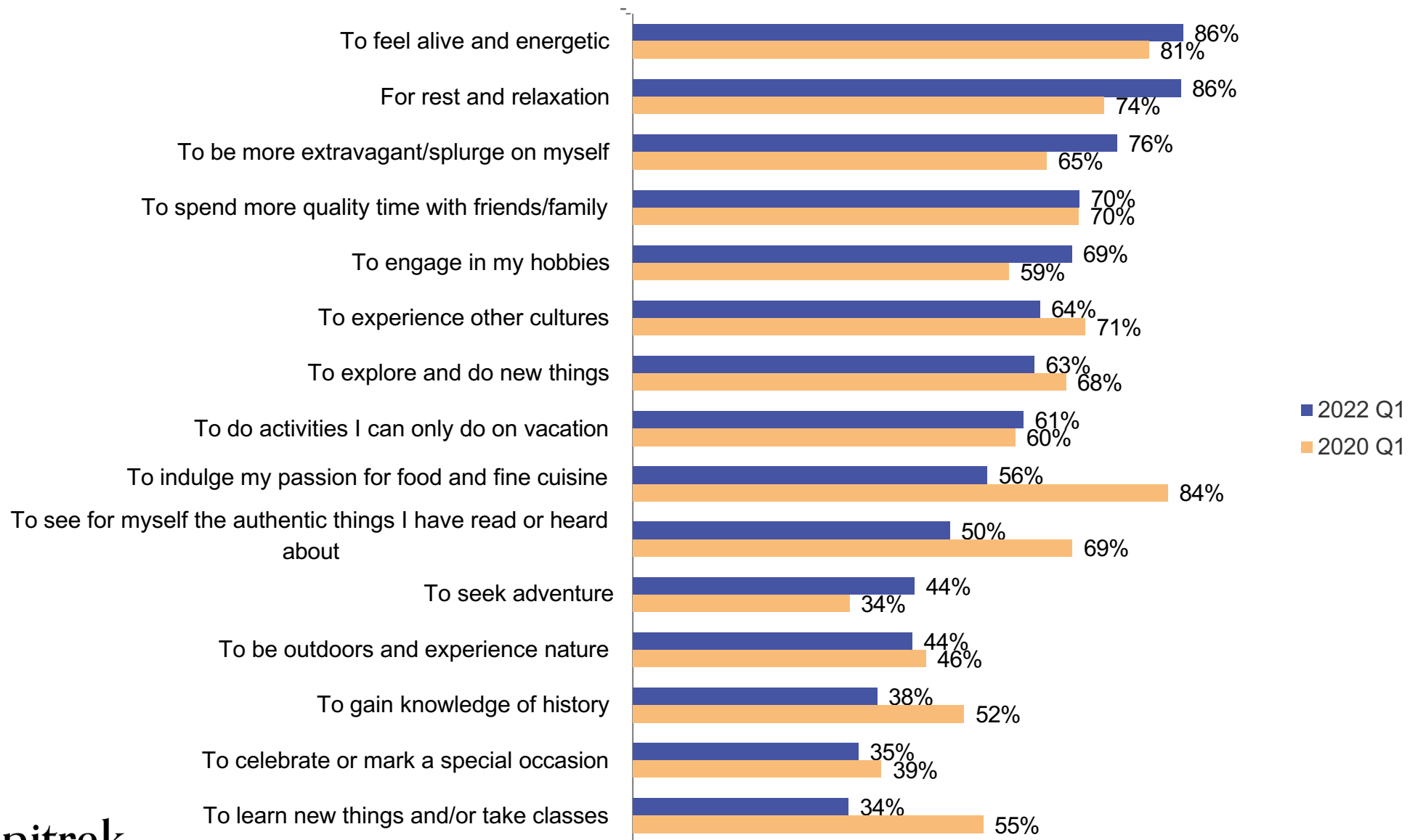
3

Summary of Markets – Japan

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Top Destination Selection Attributes - Japan

| Japan | 2022 Qtr 1 | 2020 Qtr 1 | DIFF |
|--|---------------|---------------|---------|
| Sense of relaxation, a place to unwind and re-energize | 84% | 79% | +5 pts |
| Safe and secure | 82% | 78% | +4 pts |
| Great place to get away from day-to-day life | 81% | 81% | -- |
| Unique scenery unlike anywhere else | 81% | 84% | -3 pts |
| Good value for the money | 79% | 62% | +17 pts |
| Offers a different experience than other places | 71% | 74% | -3 pts |
| Clean environment | 70% | 73% | -3 pts |
| Residents and visitors follow health/safety guidelines | 68% | -- | NA |
| Easy to navigate and get around | 65% | 72% | -7 pts |
| Has consistent/dependable experiences | 64% | 72% | -8 pts |
| Quality culinary and dining experiences | 63% | 83% | -20 pts |
| Authentic experiences | 63% | 75% | -12 pts |
| Easy to get there | 59% | 66% | -7 pts |
| History and culture are intriguing | 59% | 71% | -12 pts |
| Welcoming/open to people like me | 58% | -- | NA |

Destinations Considering/Planning to Visit – Japan

Considering for Next Overnight Vacation

| Japan | | 2020 Q1 | 2022 Q1 |
|-------|-----------------|---------|---------|
| 1 | Hawai'i | 28% | 37% |
| 2 | Europe | 33% | 30% |
| 3 | Taiwan | 28% | 30% |
| 4 | Okinawa | 22% | 27% |
| 5 | Australia | 18% | 25% |
| 6 | Singapore | 16% | 21% |
| 7 | Thailand | 13% | 19% |
| 8 | Korea | 13% | 18% |
| 9 | Guam/Saipan | 14% | 14% |
| 10 | Hong Kong | 7% | 11% |
| 11 | China | 4% | 6% |
| | Other | - - | 8% |
| | Not Considering | | 12% |

Planning to Visit in Next 12 Months

| Japan | | 2020 Q1 | 2022 Q1 |
|-------|-----------------|---------|---------|
| 1 | Okinawa | 41% | 22% |
| 2 | Hawai'i | 12% | 18% |
| 3 | Europe | 15% | 13% |
| 4 | Taiwan | - - | 13% |
| 5 | Australia | 5% | 9% |
| 6 | Korea | 4% | 8% |
| 7 | Thailand | - - | 7% |
| 8 | Guam/Saipan | 3% | 6% |
| 9 | Singapore | - - | 6% |
| 10 | Hong Kong | - - | 3% |
| 11 | China | 2% | 2% |
| | Other | - - | 6% |
| | Not Considering | | 41% |

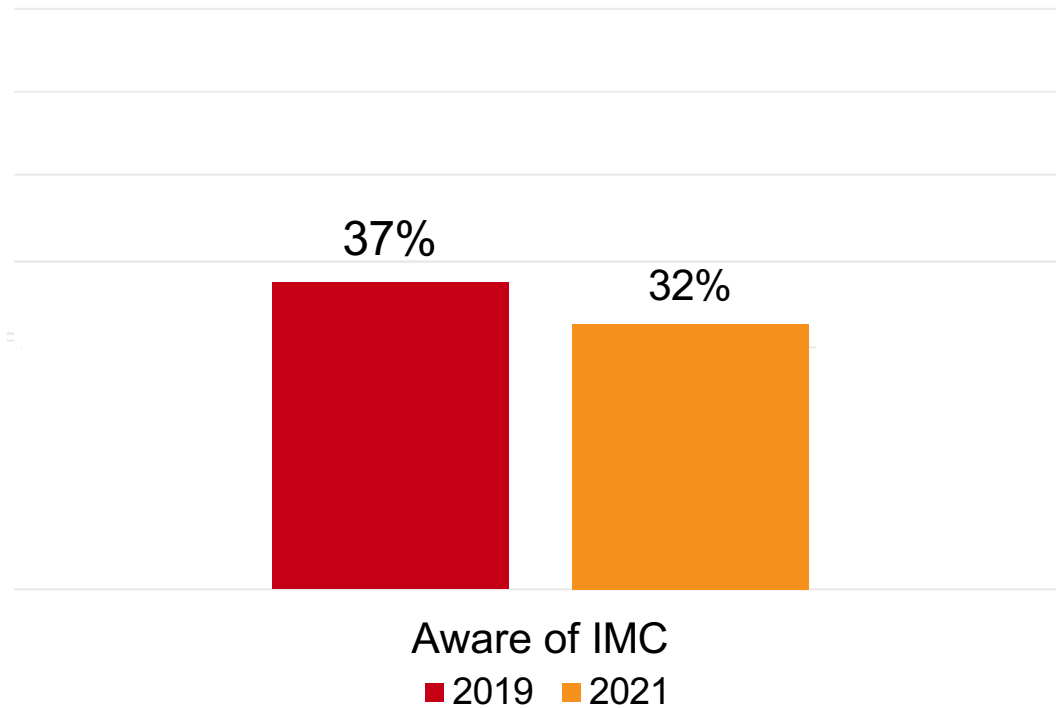
Hawai'i's Top Destination Attributes vs Competitor Destinations

Hawai'i's Top 10 Destination Attributes vs Competitor Destinations

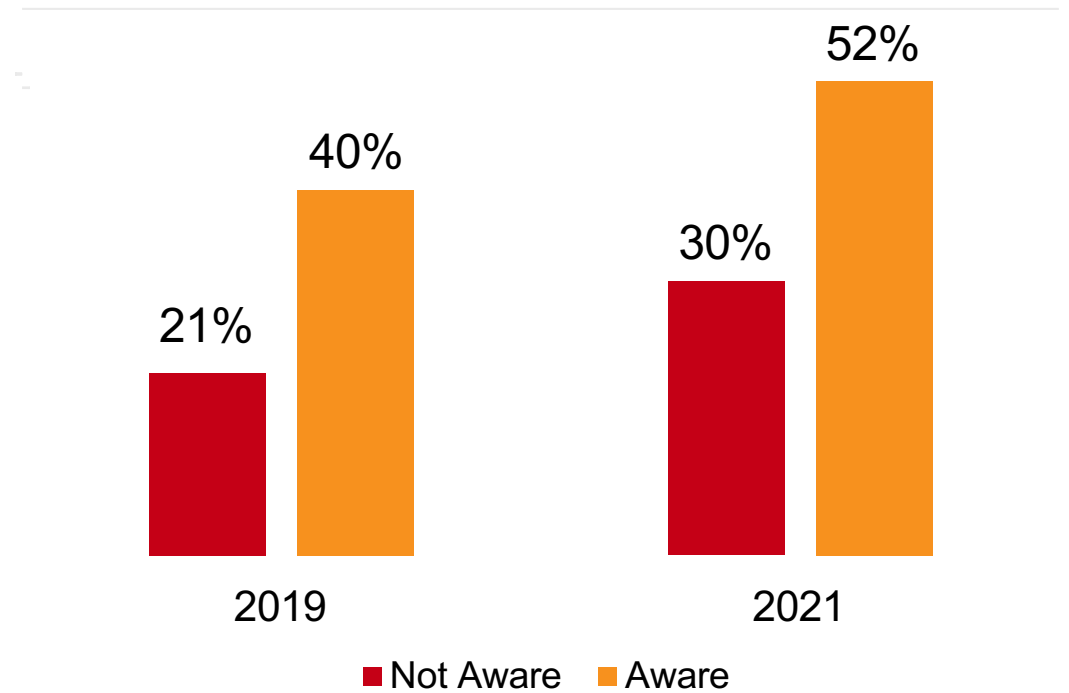
| | Hawai'i | Australia | China | Guam | Europe | Korea | Okinawa |
|--|---------|-----------|-------|------|--------|-------|---------|
| 1 Easy to get there | 67% | 51% | 14% | 40% | 57% | 16% | 37% |
| 2 Residents and visitors follow health/safety guidelines | 66% | 41% | 6% | 38% | 28% | 10% | 51% |
| 3 Unique scenery unlike anywhere else | 60% | 57% | 32% | 35% | 65% | 23% | 46% |
| 4 Authentic experiences | 59% | 32% | 6% | 32% | 21% | 11% | 49% |
| 5 Clean environment | 58% | 22% | 11% | 25% | 45% | 34% | 19% |
| 6 Quality culinary and dining experiences | 58% | 23% | 4% | 40% | 7% | 7% | 43% |
| 7 Romantic | 56% | 40% | 4% | 30% | 25% | 13% | 60% |
| 8 Friendly local people | 54% | 40% | 11% | 25% | 46% | 18% | 40% |
| 9 Easy to navigate and get around | 54% | 44% | 3% | 25% | 38% | 11% | 55% |
| 10 Has consistent/dependable experiences | 53% | 46% | 11% | 28% | 27% | 13% | 31% |

Japan: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

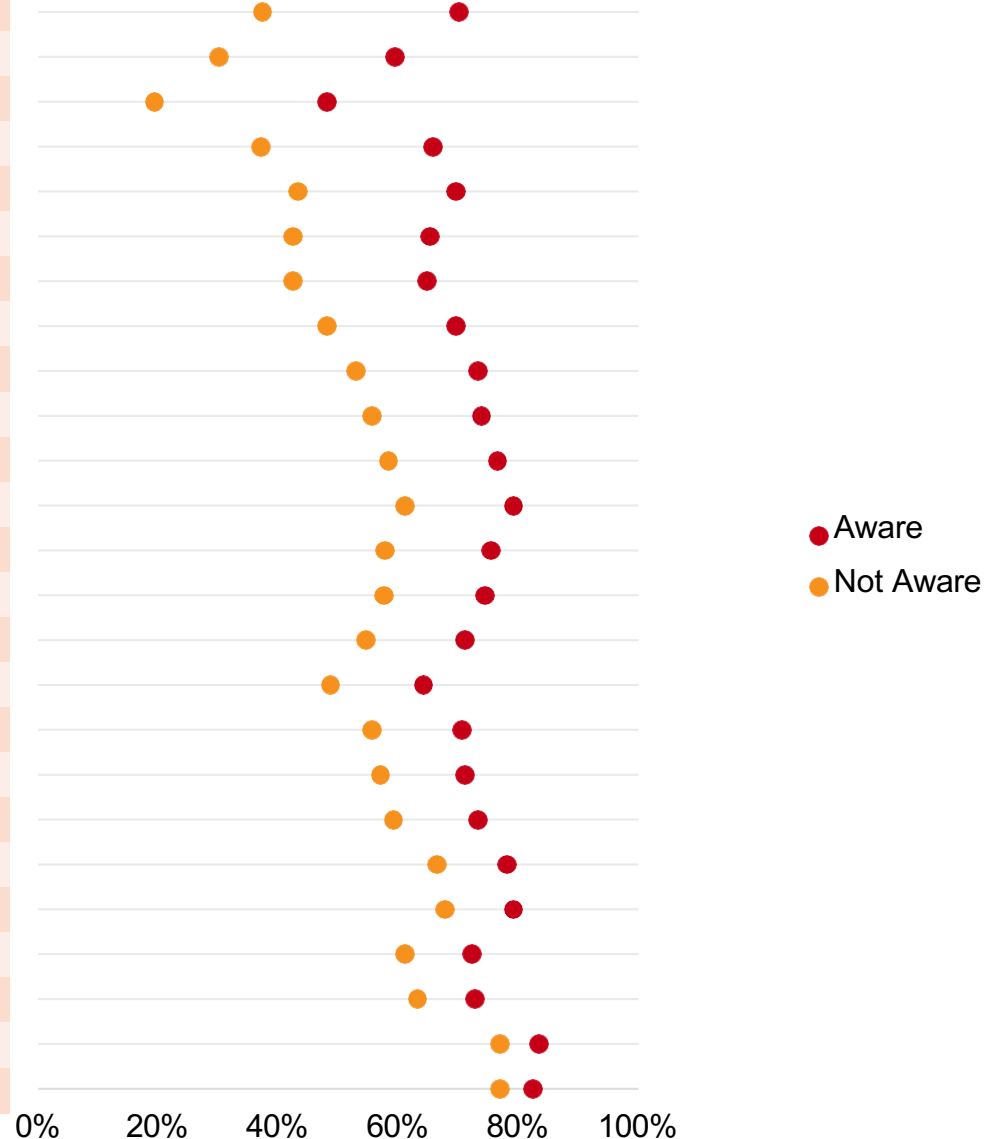


Impact on Travel Intentions
(%Considering Hawai'i for Next Vacation)

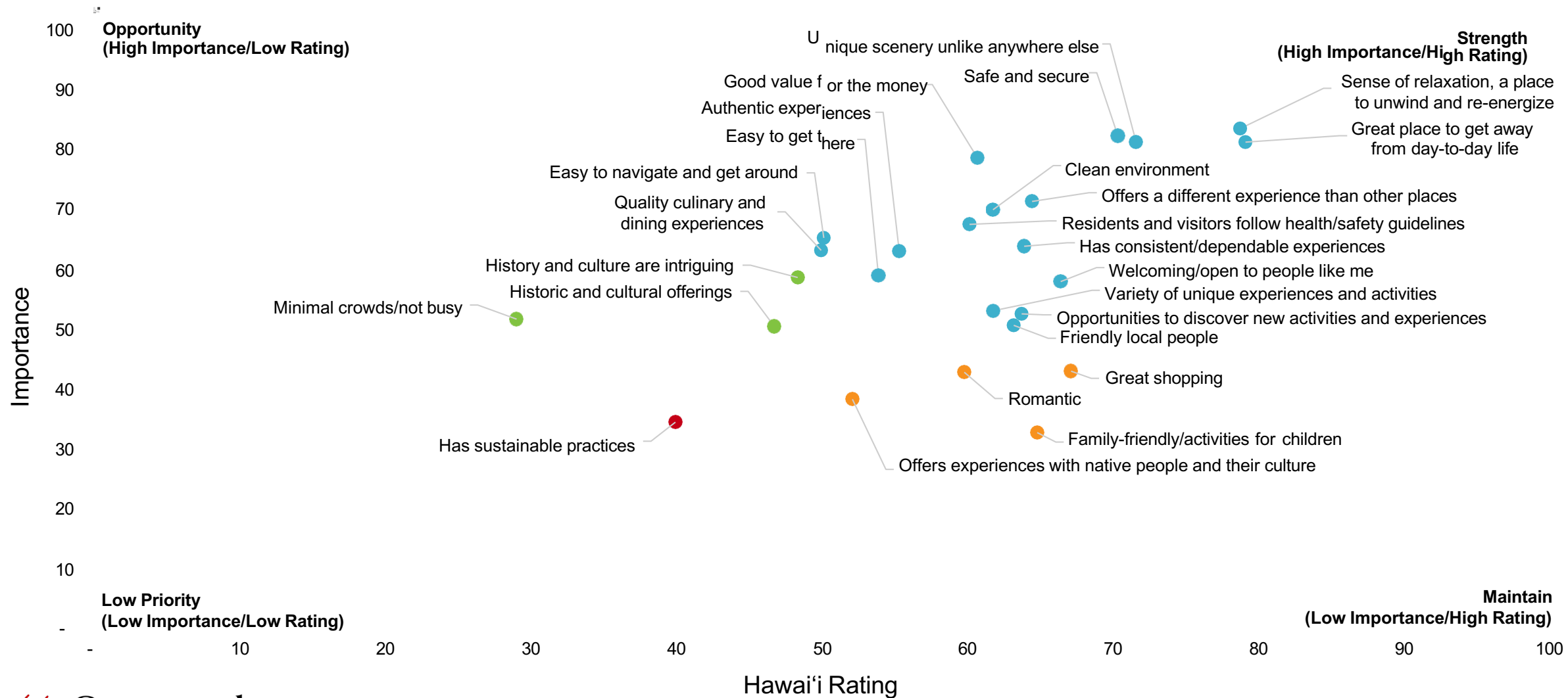


Marketing Impact on Hawai'i's Destination Attributes

| Destination Attribute | Difference |
|--|------------|
| History and culture are intriguing | +33 pts |
| Has sustainable practices | +29 pts |
| Minimal crowds/not busy | +29 pts |
| Historic and cultural offerings | +29 pts |
| Offers experiences with native people and their culture | +26 pts |
| Easy to navigate and get around | +23 pts |
| Quality culinary and dining experiences | +22 pts |
| Authentic experiences | +21 pts |
| Romantic | +20 pts |
| Clean environment | +18 pts |
| Offers a different experience than other places | +18 pts |
| Great shopping | +18 pts |
| Opportunities to discover new activities and experiences | +18 pts |
| Friendly local people | +17 pts |
| Residents and visitors follow health/safety guidelines | +17 pts |
| Easy to get there | +16 pts |
| Good value for the money | +15 pts |
| Variety of unique experiences and activities | +14 pts |
| Has consistent/dependable experiences | +14 pts |
| Safe and secure | +12 pts |
| Unique scenery unlike anywhere else | +11 pts |
| Family-friendly/activities for children | +11 pts |
| Welcoming/open to people like me | +10 pts |
| Great place to get away from day-to-day life | +7 pts |
| Sense of relaxation, a place to unwind and re-energize | +5 pts |



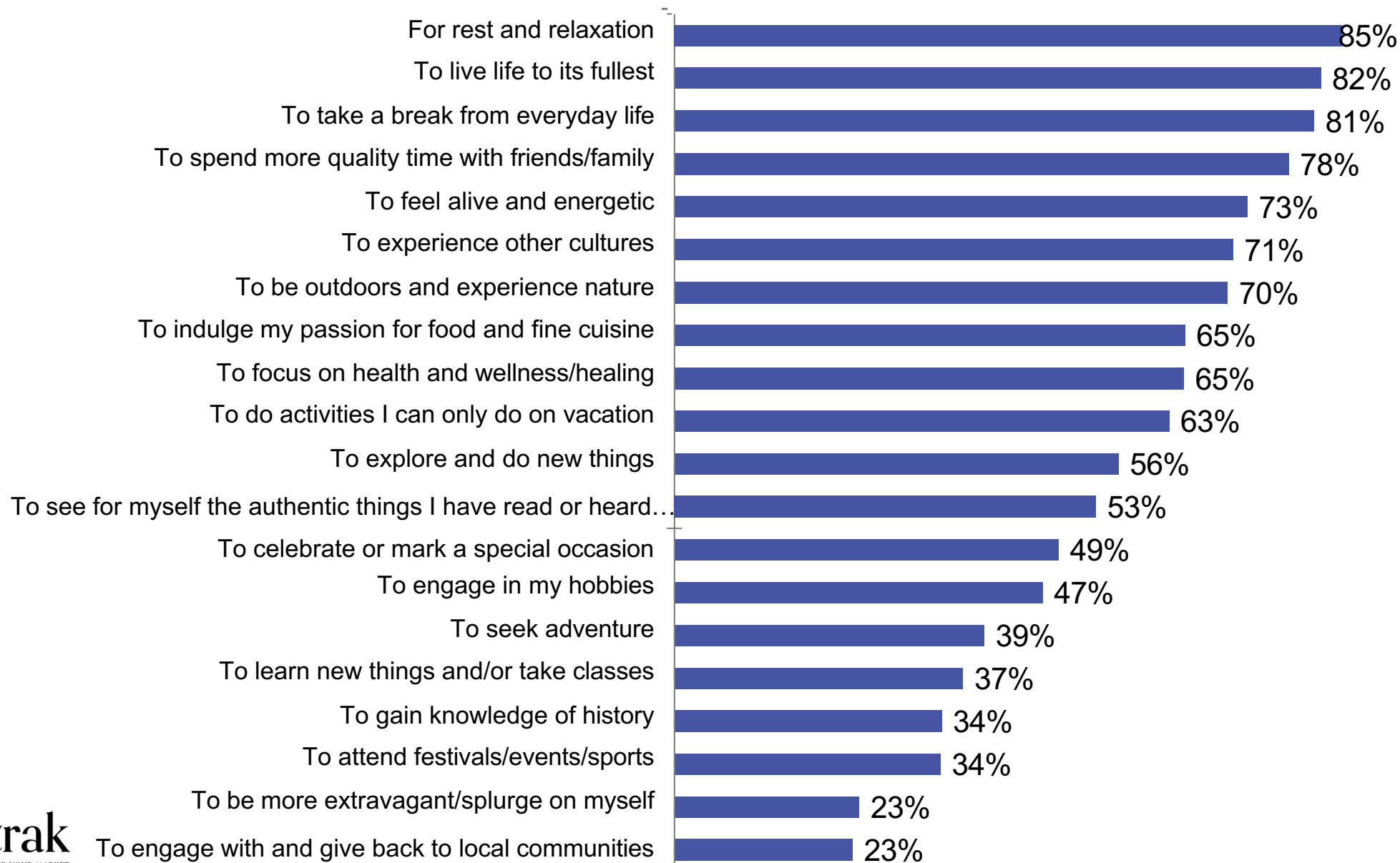
Destination Attributes – Importance vs Hawai‘i Rating



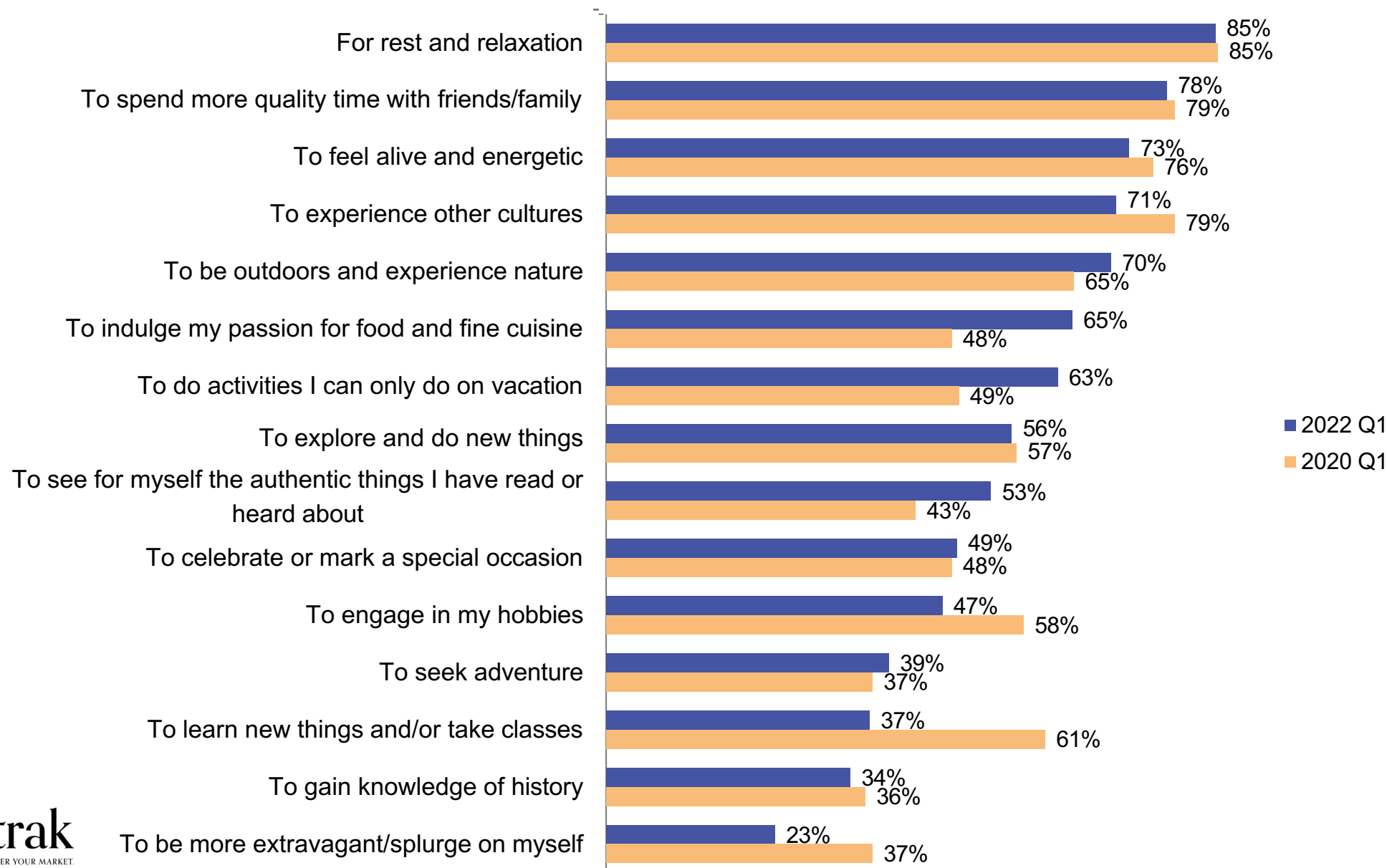
4

Summary of Markets – Korea

Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Reasons for Taking a Vacation – Top 2 Box Very/Extremely Important



Destination Selection Attributes - Korea

| Korea | 2022 Qtr 1 | 2020 Qtr 1 | DIFF |
|--|------------|------------|--------|
| Safe and secure | 83% | 78% | +5 pts |
| Sense of relaxation, a place to unwind and re-energize | 82% | 83% | - 1pt |
| Great place to get away from day-to-day life | 82% | 78% | +4 pts |
| Clean environment | 80% | 72% | +8 pts |
| Residents and visitors follow health/safety guidelines | 74% | - - | NA |
| Unique scenery unlike anywhere else | 73% | 78% | -5 pts |
| Easy to navigate and get around | 72% | 70% | +2 pts |
| Has consistent/dependable experiences | 72% | 67% | +5 pts |
| Good value for the money | 72% | 72% | - - |
| Quality culinary and dining experiences | 70% | 62% | +8 pts |
| Offers a different experience than other places | 70% | 74% | -4 pts |
| Opportunities to discover new activities and experiences | 67% | 60% | +7 pts |
| Welcoming/open to people like me | 64% | - - | NA |
| Easy to get there | 64% | 63% | +1 pt |
| History and culture are intriguing | 62% | 66% | -4 pts |

Destinations Considering/Planning to Visit – Korea

Considering for Next Overnight Vacation

| Korea | | | |
|----------|-----------------|------------|------------|
| | | | |
| 1 | Southeast Asia | 30% | 42% |
| 2 | Europe | 40% | 41% |
| 3 | Japan | 21% | 39% |
| 4 | Guam/Saipan | 34% | 39% |
| 5 | Hawai'i | 39% | 34% |
| 6 | Australia | 30% | 34% |
| 7 | USA | 14% | 27% |
| 8 | Maldives | 27% | 22% |
| | Other | -- | 2% |
| | Not Considering | -- | 4% |

Planning to Visit in Next 12 Months

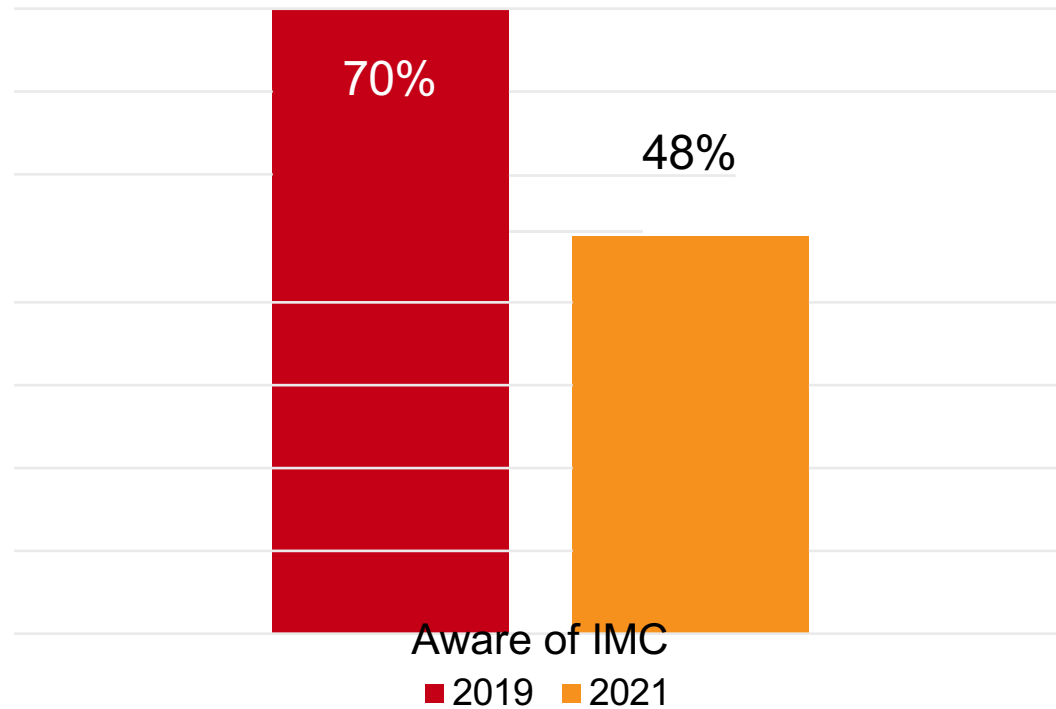
| Korea | | | |
|----------|-----------------|------------|------------|
| | | 2020 Q1 | 2022 Q1 |
| 1 | Southeast Asia | 22% | 33% |
| 2 | Japan | 15% | 31% |
| 3 | Hawai'i | 22% | 27% |
| 4 | Europe | 21% | 25% |
| 5 | Guam/Saipan | -- | 22% |
| 6 | USA | 14% | 20% |
| 7 | Australia | 14% | 15% |
| 8 | Maldives | 13% | 12% |
| | Other | -- | 2% |
| | Not Considering | -- | 16% |

Hawai'i's Top Destination Attributes vs Competitor Destinations

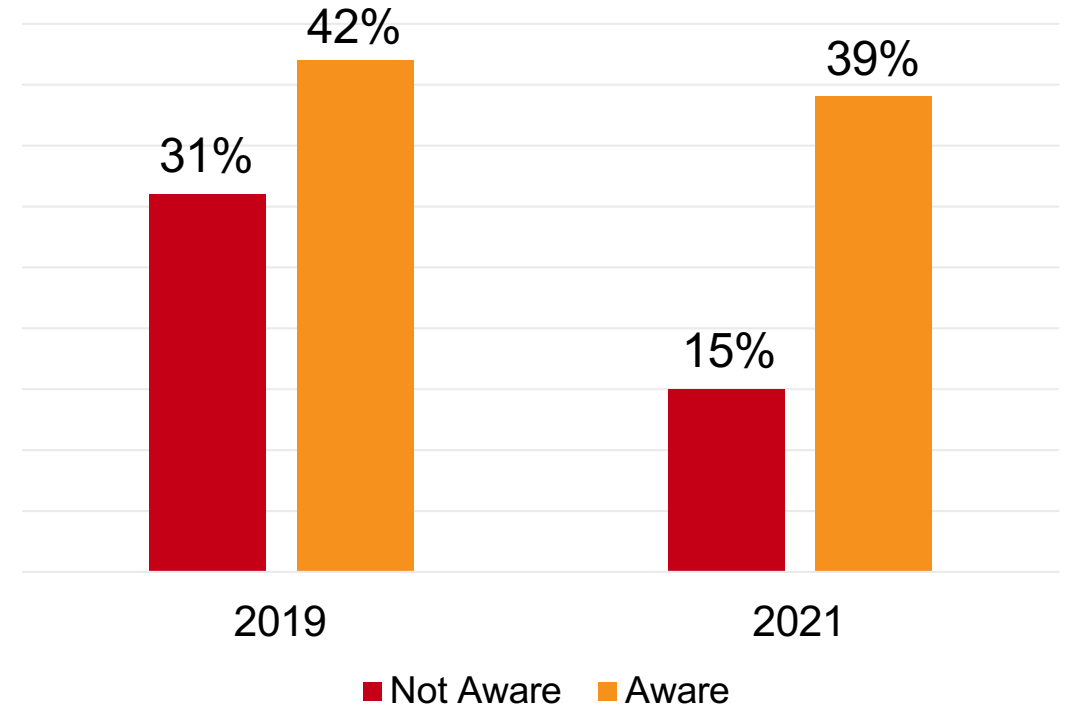
| Hawai'i's Top 10 Destination Attributes vs Competitor Destinations | | | | | | | |
|--|---------|-----------|-------|------|--------|----------------|-------|
| | Hawai'i | Australia | Japan | Guam | Europe | Southeast Asia | U.S.A |
| 1 Residents and visitors follow health/safety guidelines | 49% | 27% | 20% | 48% | 9% | 31% | 9% |
| 2 Easy to get there | 48% | 34% | 20% | 47% | 25% | 31% | 18% |
| 3 Great shopping | 45% | 20% | 10% | 31% | 31% | 11% | 10% |
| 4 Unique scenery unlike anywhere else | 39% | 37% | 18% | 32% | 34% | 35% | 18% |
| 5 Easy to navigate and get around | 34% | 39% | 46% | 27% | 16% | 11% | 15% |
| 6 Family-friendly/activities for children | 33% | 26% | 24% | 33% | 15% | 42% | 11% |
| 7 Romantic | 30% | 27% | 46% | 25% | 16% | 12% | 12% |
| 8 Has consistent/dependable experiences | 30% | 29% | 21% | 23% | 22% | 38% | 18% |
| 9 Quality culinary and dining experiences | 29% | 22% | 21% | 37% | 11% | 23% | 11% |
| 10 Authentic experiences | 29% | 21% | 29% | 29% | 15% | 41% | 14% |

Korea: Integrated Marketing Campaign (IMC) Awareness & Impact

Awareness

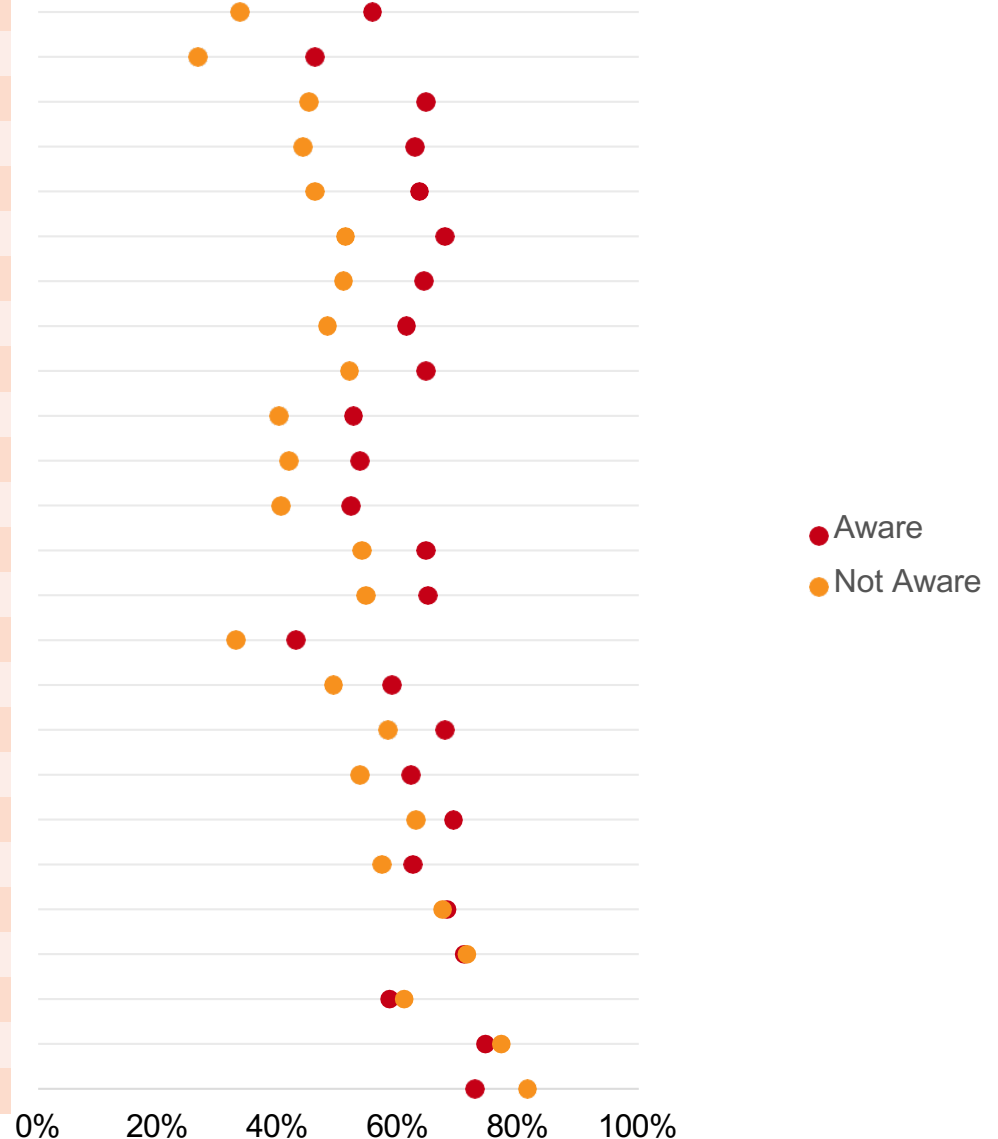


Impact on Travel Intentions
(%Considering Hawai'i for Next Vacation)



Marketing Impact on Hawai'i's Destination Attributes

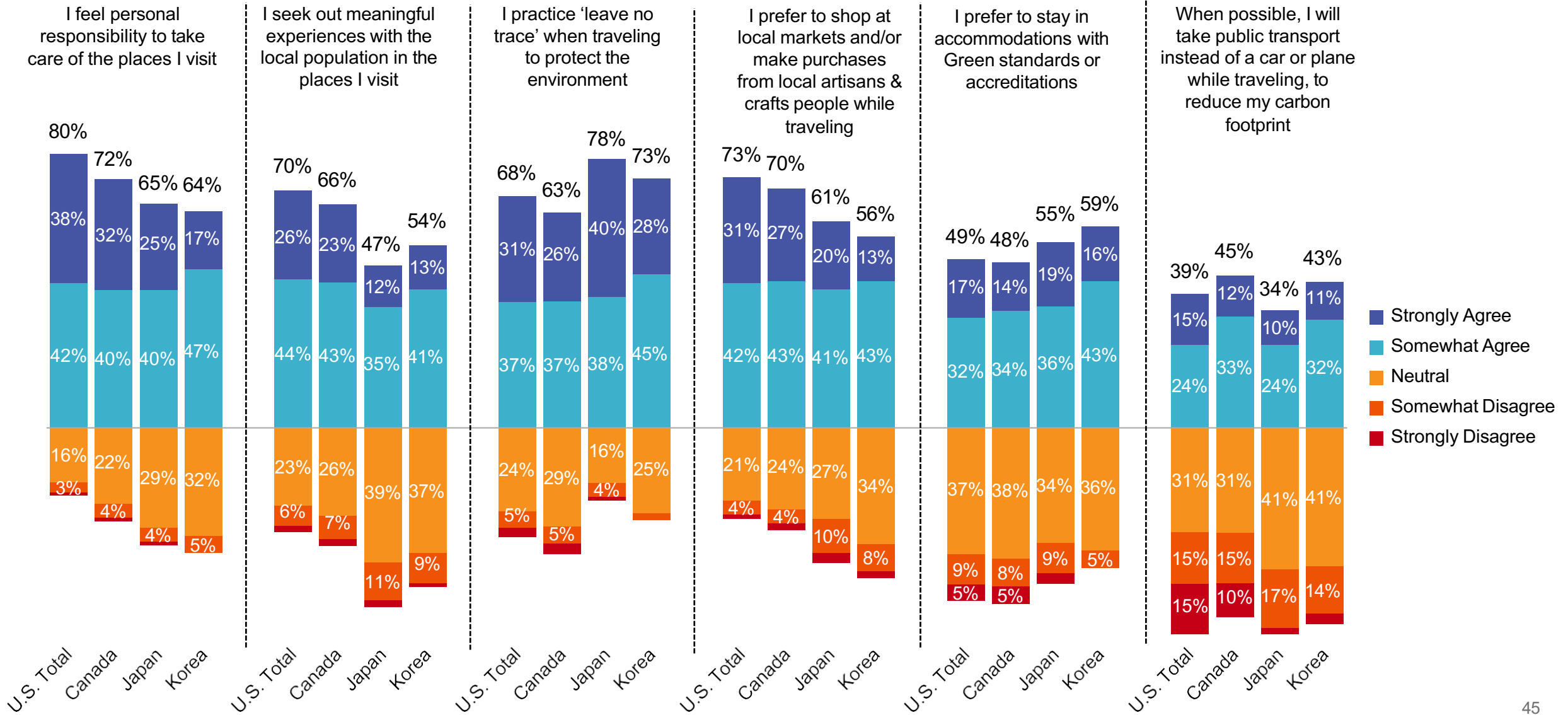
| Destination Attribute | Difference |
|--|------------|
| Easy to get there | +22 pts |
| Good value for the money | +19 pts |
| Residents and visitors follow health/safety guidelines | +19 pts |
| Easy to navigate and get around | +19 pts |
| Welcoming/open to people like me | +17 pts |
| Family-friendly/activities for children | +17 pts |
| Authentic experiences | +13 pts |
| Great shopping | +13 pts |
| Offers a different experience than other places | +13 pts |
| History and culture are intriguing | +12 pts |
| Has sustainable practices | +12 pts |
| Historic and cultural offerings | +12 pts |
| Safe and secure | +11 pts |
| Offers experiences with native people and their culture | +10 pts |
| Minimal crowds/not busy | +10 pts |
| Friendly local people | +10 pts |
| Variety of unique experiences and activities | +9 pts |
| Has consistent/dependable experiences | +9 pts |
| Clean environment | +6 pts |
| Quality culinary and dining experiences | +5 pts |
| Romantic | +1 pt |
| Unique scenery unlike anywhere else | 0 pts |
| Opportunities to discover new activities and experiences | -2 pts |
| Sense of relaxation, a place to unwind and re-energize | -3 pts |
| Great place to get away from day-to-day life | -9 pts |



Destination Attributes – Importance vs Hawai'i Rating



Sustainable Travel





Mahalo

from the Omnitrak Group