

**2003**

**Visitor Satisfaction  
& Activity Report**



State of Hawaii  
Department of Business, Economic Development & Tourism  
Research & Economic Analysis Division

# 2003 VISITOR SATISFACTION AND ACTIVITY REPORT

**DBEDT**  
THE DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM  
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# TABLE OF CONTENTS

|   | <u>Page</u> |
|---|-------------|
| 1. INTRODUCTION   | 1           |
| 2. OVERVIEW   | 3           |
| 3. SATISFACTION AND RATING                                  | 16          |
| 4. EXPERIENCE AND WILLINGNESS TO RECOMMEND/REVISIT          | 33          |
| Satisfaction by Island                                      | 34          |
| Likelihood to Recommend                                     | 34          |
| Likelihood to Revisit Hawaii                                | 35          |
| 5. ACTIVITY PARTICIPATION                                   | 44          |
| Shopping  | 45          |
| Sightseeing   | 46          |
| Recreation  | 47          |
| Cultural  | 49          |
| Entertainment   | 50          |
| Transportation  | 51          |
| 6. TRIP PLANNING  | 65          |
| Trip Planning and Booking Timetable                         | 66          |
| Island Visitation Decision Timetable                        | 67          |
| Internet Use  | 67          |
| 7. SAFETY ISSUES AND OTHER NUISANCE                         | 73          |
| 8. VISITOR PROFILE  | 79          |
| Primary Purpose of Trip                                     | 80          |
| Secondary Purpose of Trip                                   | 80          |
| Travel Companions   | 81          |
| Income Level  | 81          |
| Other Visitor Characteristics                               | 81          |
| 9. SURVEY METHODOLOGY                                       | 93          |
| 10. 2003 VISITOR SATISFACTION SURVEY FORM (English version) | 96          |

# LIST OF TABLES

| <b><u>Satisfaction and Rating</u></b> |   | <b><u>Page</u></b> |
|---------------------------------------|---|--------------------|
| Table 3.1                             | Overall Satisfaction by Major Category – U.S. Total               | 19                 |
| Table 3.2                             | Overall Satisfaction by Major Category – U.S. West                | 19                 |
| Table 3.3                             | Overall Satisfaction by Major Category – U.S. East                | 19                 |
| Table 3.4                             | Overall Satisfaction by Major Category – Japan                    | 20                 |
| Table 3.5                             | Overall Satisfaction by Major Category – Canada                   | 20                 |
| Table 3.6                             | Overall Satisfaction by Major Category – Europe                   | 20                 |
| Table 3.7                             | Overall Satisfaction by Major Category and Lifestage – U.S. Total | 21                 |
| Table 3.8                             | Overall Satisfaction by Major Category and Lifestage – U.S. West  | 22                 |
| Table 3.9                             | Overall Satisfaction by Major Category and Lifestage – U.S. East  | 23                 |
| Table 3.10                            | Overall Satisfaction by Major Category and Lifestage – Japan      | 24                 |
| Table 3.11                            | Overall Satisfaction by Major Category and Lifestage – Canada     | 25                 |
| Table 3.12                            | Overall Satisfaction by Major Category and Lifestage – Europe     | 26                 |
| Table 3.13                            | Detailed Satisfaction Ratings by Category – U.S. Total            | 27                 |
| Table 3.14                            | Detailed Satisfaction Ratings by Category – U.S. West             | 28                 |
| Table 3.15                            | Detailed Satisfaction Ratings by Category – U.S. East             | 29                 |
| Table 3.16                            | Detailed Satisfaction Ratings by Category – Japan                 | 30                 |
| Table 3.17                            | Detailed Satisfaction Ratings by Category –Canada                 | 31                 |
| Table 3.18                            | Detailed Satisfaction Ratings by Category –Europe                 | 32                 |

| <b><u>Experience and Willingness to Recommend/Revisit</u></b> |  | <b><u>Page</u></b> |
|---|--|--------------------|
| Table 4.1   | Overall Island Experience by MMA   | 37                 |
| Table 4.2   | Overall Rating of Most Recent Vacation to Hawaii by MMA                    | 38                 |
| Table 4.3   | Expectations of Hawaiian Vacation by MMA                                   | 38                 |
| Table 4.4   | Likelihood to Recommend Hawaii as a Vacation Place by MMA                  | 38                 |
| Table 4.5   | Likelihood to Recommend Hawaii by Lifestage – U.S. Total                   | 39                 |
| Table 4.6   | Likelihood to Recommend Hawaii by Lifestage – U.S. West                    | 39                 |
| Table 4.7   | Likelihood to Recommend Hawaii by Lifestage – U.S. East                    | 39                 |
| Table 4.8   | Likelihood to Recommend Hawaii by Lifestage – Japan                        | 40                 |
| Table 4.9   | Likelihood to Recommend Hawaii by Lifestage – Canada                       | 40                 |
| Table 4.10  | Likelihood to Recommend Hawaii by Lifestage – Europe                       | 40                 |
| Table 4.11  | Likelihood to Revisit Hawaii in the Next 5 Years by MMA                    | 41                 |
| Table 4.12  | Reasons for Not Revisiting Hawaii by MMA                                   | 41                 |
| Table 4.13  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – U.S. Total | 42                 |
| Table 4.14  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – U.S. West  | 42                 |
| Table 4.15  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – U.S. East  | 42                 |
| Table 4.16  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – Japan      | 43                 |
| Table 4.17  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – Canada     | 43                 |
| Table 4.18  | Likelihood to Revisit Hawaii in the Next 5 Years by Lifestage – Europe     | 43                 |

| <b><u>Activity Participation</u></b> |  | <b><u>Page</u></b> |
|--------------------------------------|--|--------------------|
| Table 5.1                            | Activity Participation by Island – U.S. Total    | 53                 |
| Table 5.2                            | Activity Participation by Island – U.S. West     | 54                 |
| Table 5.3                            | Activity Participation by Island – U.S. East     | 55                 |
| Table 5.4                            | Activity Participation by Island – Japan         | 56                 |
| Table 5.5                            | Activity Participation by Island – Canada        | 57                 |
| Table 5.6                            | Activity Participation by Island – Europe        | 58                 |
| Table 5.7                            | Activity Participation by Lifestage – U.S. Total | 59                 |
| Table 5.8                            | Activity Participation by Lifestage – U.S. West  | 60                 |
| Table 5.9                            | Activity Participation by Lifestage – U.S. East  | 61                 |
| Table 5.10                           | Activity Participation by Lifestage – Japan      | 62                 |
| Table 5.11                           | Activity Participation by Lifestage – Canada     | 63                 |
| Table 5.12                           | Activity Participation by Lifestage – Europe     | 64                 |

| <b><u>Trip Planning</u></b> |  | <b><u>Page</u></b> |
|-----------------------------|--|--------------------|
| Table 6.1                   | Trip Planning & Booking Timetable – U.S. Total       | 69                 |
| Table 6.2                   | Trip Planning & Booking Timetable – U.S. West        | 69                 |
| Table 6.3                   | Trip Planning & Booking Timetable – U.S. East        | 69                 |
| Table 6.4                   | Trip Planning & Booking Timetable – Japan            | 70                 |
| Table 6.5                   | Trip Planning & Booking Timetable – Canada           | 70                 |
| Table 6.6                   | Trip Planning & Booking Timetable – Europe           | 70                 |
| Table 6.7                   | Island Visitation Decision Timetable by MMA          | 71                 |
| Table 6.8                   | Sources of Information Used for Trip Planning by MMA | 71                 |
| Table 6.9                   | Internet Usage for Trip Planning by MMA              | 72                 |
| Table 6.10                  | Internet Users by MMA                                | 72                 |
| Table 6.11                  | Usage of Travel Agent by MMA                         | 72                 |

| <b><u>Safety Issues and Other Nuisance</u></b> |  | <b><u>Page</u></b> |
|--|--|--------------------|
| Table 7.1                                      | Safety Issues and Other Nuisance by MMA                    | 76                 |
| Table 7.2                                      | Safety Issues and Other Nuisance by Lifestage – U.S. Total | 76                 |
| Table 7.3                                      | Safety Issues and Other Nuisance by Lifestage – U.S. West  | 77                 |
| Table 7.4                                      | Safety Issues and Other Nuisance by Lifestage – U.S. East  | 77                 |
| Table 7.5                                      | Safety Issues and Other Nuisance by Lifestage – Japan      | 77                 |
| Table 7.6                                      | Safety Issues and Other Nuisance by Lifestage – Canada     | 78                 |
| Table 7.7                                      | Safety Issues and Other Nuisance by Lifestage – Europe     | 78                 |

| <b><u>Visitor Profile</u></b> |   | <b><u>Page</u></b> |
|-------------------------------|---|--------------------|
| Table 8.1                     | Visitors by Lifestyle / Lifestage by MMA            | 84                 |
| Table 8.2                     | Visitors by Income Level and by Island – U.S. Total | 84                 |
| Table 8.3                     | Visitors by Income Level and by Island – U.S. West  | 84                 |
| Table 8.4                     | Visitors by Income Level and by Island – U.S. East  | 85                 |
| Table 8.5                     | Visitors by Income Level and by Island – Japan      | 85                 |
| Table 8.6                     | Visitors by Income Level and by Island – Canada     | 85                 |

## Visitor Profile (Continued)

## Page

|            |  |    |
|------------|--|----|
| Table 8.7  | Visitors by Income Level and by Island – Europe              | 86 |
| Table 8.8  | Visitor by Companion Type by MMA                             | 86 |
| Table 8.9  | Visitor Travel History by MMA                                | 86 |
| Table 8.10 | Visitor Relationship with Hawaii by MMA                      | 87 |
| Table 8.11 | Visitor Education Level by MMA                               | 87 |
| Table 8.12 | Visitor Employment Status by MMA                             | 87 |
| Table 8.13 | Visitor Primary Purpose of Trip                              | 88 |
| Table 8.14 | Visitor Primary Purpose of Trip by Lifestage – U.S. Total    | 88 |
| Table 8.15 | Visitor Primary Purpose of Trip by Lifestage – U.S. West     | 88 |
| Table 8.16 | Visitor Primary Purpose of Trip by Lifestage – U.S. East     | 89 |
| Table 8.17 | Primary Purpose of Trip by Lifestage – Japan                 | 89 |
| Table 8.18 | Primary Purpose of Trip by Lifestage – Canada                | 89 |
| Table 8.19 | Primary Purpose of Trip by Lifestage – Europe                | 90 |
| Table 8.20 | Visitors Secondary Purpose of Trip                           | 90 |
| Table 8.21 | Visitors Secondary Purpose of Trip by Lifestage – U.S. Total | 90 |
| Table 8.22 | Visitors Secondary Purpose of Trip by Lifestage – U.S. West  | 91 |
| Table 8.23 | Visitors Secondary Purpose of Trip by Lifestage – U.S. East  | 91 |
| Table 8.24 | Visitors Secondary Purpose of Trip by Lifestage – Japan      | 91 |
| Table 8.25 | Visitors Secondary Purpose of Trip by Lifestage – Canada     | 92 |
| Table 8.26 | Visitors Secondary Purpose of Trip by Lifestage – Europe     | 92 |

## **LIST OF FIGURES**

|           |   |    |
|-----------|---|----|
| Figure 1  | Overall Satisfaction Trends – U.S. and Japanese Visitors                                      | 4  |
| Figure 2  | Likelihood of Visiting Hawaii in the Next Five Years – U.S. & Japanese Visitors               | 5  |
| Figure 3  | Likelihood of Visiting Hawaii in the Next Five Years – Canadian & European Visitors           | 6  |
| Figure 4  | Reasons for Not Revisiting Hawaii – U.S. Visitors   | 6  |
| Figure 5  | Reasons for Not Revisiting Hawaii – Japanese Visitors   | 7  |
| Figure 6  | Reasons for Not Revisiting Hawaii – Canadian Visitors   | 7  |
| Figure 7  | Reasons for Not Revisiting Hawaii – European Visitors   | 7  |
| Figure 8  | Percentage of Excellent Satisfaction Ratings by Island – U.S. Visitors                        | 8  |
| Figure 9  | Percentage of Excellent Satisfaction Ratings by Island – Japanese Visitors                    | 9  |
| Figure 10 | Percentage of Excellent Satisfaction Ratings by Island – Canadian Visitors                    | 9  |
| Figure 11 | Percentage of Excellent Satisfaction Ratings by Island – European Visitors                    | 9  |
| Figure 12 | Activity Participation – U.S. and Japanese Visitors   | 10 |
| Figure 13 | Activity Participation – Canadian and European Visitors                                       | 10 |
| Figure 14 | Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure<br>– U.S. Visitors     | 11 |
| Figure 15 | Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure<br>– Japanese Visitors | 11 |
| Figure 16 | Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure<br>– Canadian Visitors | 12 |
| Figure 17 | Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure<br>– European Visitors | 12 |

|           |  |    |
|-----------|--|----|
| Figure 18 | Timeframe in Deciding to Visit Hawaii Before Departure – U.S. Visitors     | 12 |
| Figure 19 | Timeframe in Deciding to Visit Hawaii Before Departure – Japanese Visitors | 13 |
| Figure 20 | Timeframe in Deciding to Visit Hawaii Before Departure – Canadian Visitors | 13 |
| Figure 21 | Timeframe in Deciding to Visit Hawaii Before Departure – European Visitors | 13 |
| Figure 22 | Timeframe in Purchasing Tickets Before Departure – U.S. Visitors           | 14 |
| Figure 23 | Timeframe in Purchasing Tickets Before Departure – Japanese Visitors       | 14 |
| Figure 24 | Timeframe in Purchasing Tickets Before Departure – Canadian Visitors       | 15 |
| Figure 25 | Timeframe in Purchasing Tickets Before Departure – European Visitors       | 15 |
| Figure 26 | Percentage of Visitors Who Encountered Safety Issues – U.S. Visitors       | 74 |
| Figure 27 | Percentage of Visitors Who Encountered Safety Issues – Japanese Visitors   | 74 |
| Figure 28 | Percentage of Visitors Who Encountered Safety Issues – Canadian Visitors   | 75 |
| Figure 29 | Percentage of Visitors Who Encountered Safety Issues – European Visitors   | 75 |



# ABOUT THIS REPORT

This report was produced by the staff of the Research and Economic Analysis Division of the Hawaii State Department of Business, Economic Development & Tourism (DBEDT). The department is headed by Theodore E. Liu. Dr. Eugene Tian, Tourism Research Manager, prepared this report under the direction of the Division Administrator, Dr. Pearl Imada Iboshi, with the assistance of Minh-Chau T. Chun, Cy Feng and Jerrene Takeuchi. Marsha Wienert, Hawaii State Tourism Liaison, reviewed this report and provided valuable comments.

The report is also available in Adobe Acrobat format at the DBEDT website <http://www.hawaii.gov/dbedt/latest.html>. Due to the cost of printing, many of the data such as activities by income level, activities by age, and activities by accommodation are not included in this report but can be found on the DBEDT website.

For further information about obtaining visitor data and other sources, contact the DBEDT Library at (808) 586-2424, or e-mail [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov).

For further information about obtaining copies of the report, contact the DBEDT Research and Economic Analysis Division at (808) 586-2466.

# 1. INTRODUCTION



# INTRODUCTION

## BACKGROUND:

The Visitor Satisfaction Survey was initiated by the Hawaii Visitors and Convention Bureau (HVCB, formerly known as the Hawaii Visitors Bureau) in the 1950s. The survey has been conducted intermittently during the years and published reports by HVCB are available for 1961, 1969-1977, 1984-1992, 1996 and 1998, focusing on visitors from U.S. and Japan.

In January 1999 the Legislature transferred the responsibility for visitor related research projects from HVCB to the Department of Business, Economic Development and Tourism (DBEDT). DBEDT began conducting the Visitor Satisfaction study in 2001 and published the survey results on the DBEDT website: <http://www.hawaii.gov/dbedt/stats.html>.

In this report, DBEDT presents visitor satisfaction survey results from the 2003 Visitor Satisfaction Survey. Beginning in 2002, DBEDT began collecting satisfaction results from a survey of Canadian and European visitors.

## OBJECTIVES:

There are three main objectives of this report. The first objective is to present satisfaction ratings by survey respondents from the top five major market areas, U.S. West, U.S. East, Japan, Canada and Europe regarding the various aspects of their trip to the islands. These visitors were queried about their experiences with Hawaii's accommodations, restaurants, airports, parks, beaches and attractions, as well as their participation in and satisfaction with activities such as sightseeing, shopping, transportation, cultural, entertainment and sports and fitness. It is hoped that this information will help Hawaii's businesses take proactive measures in promotion, maintenance and improvement in these essential areas.

The second objective is to provide some insight into the destination selection process of these visitors. The data show that visitors employ a variety of sources to plan, select and book a trip to the Hawaiian Islands. In particular, the data allow a closer look at the impact of the Internet and travel agents on the selection process, as well as the timetable involved in trip planning and booking.

The final objective is to provide detailed demographic information on visitors who responded to the study. Information is provided on the average visitors' income level, employment status and education level. Furthermore, visitors are classified in lifestyle or life-stage segments as well as first-time or repeat visitors to highlight the different types of travelers to the islands. Information on their purpose of trip and their travel companions helps to complete the picture of the Hawaii visitors.

## 2. OVERVIEW



## 2. OVERVIEW

### Overall Satisfaction:

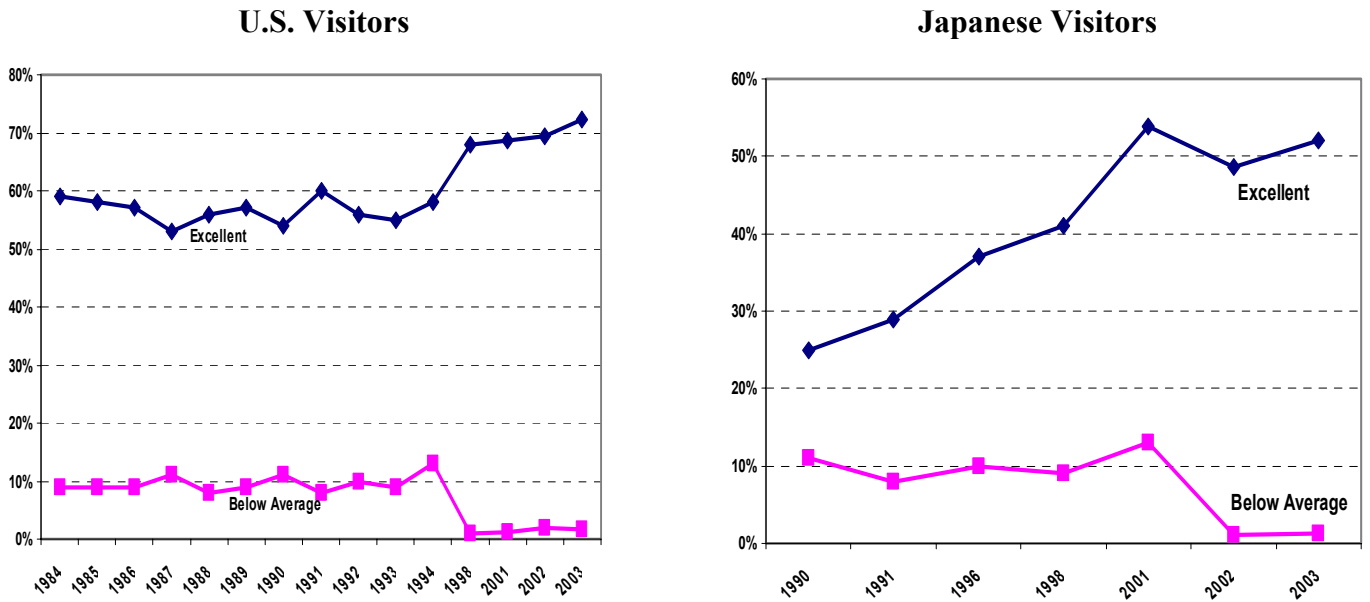
Over the years the State of Hawaii has continuously received high ratings from U.S. and Japanese visitors who participated in the Visitor Satisfaction Survey. In 2003 more than 96 percent of the U.S. West, U.S. East, Japanese, Canadian and European survey participants rated their most recent Hawaiian vacation as “excellent” or “above average”.

Combined results from the U.S. visitor satisfaction survey show that “Excellent” ratings increased to 72.4 percent in 2003, while ratings of “Below average” continued to comprise a very small portion of the total U.S. respondents at 1.7 percent.

52 percent of the Japanese visitors polled in the 2003 survey gave “excellent” marks to their Hawaiian vacation compared to 48.7 percent in 2002 and 53.9 percent in 2001. “Below average” ratings was 2.5 percent of all visitors surveyed. “Poor” ratings made up only .8 percent of the Japanese respondents in 2003.

Close to 64 percent of the Canadian visitors surveyed and 67.5 percent of the European respondents rated Hawaii as “excellent”. The percentage of Canadians that rated Hawaii as “excellent” was up about 4 percent from 2002. “Below average” ratings increased slightly from 2002 but still comprised only 3.0 percent of the Canadians and 2.2 percent of the European respondents.

**Figure 1: Overall Satisfaction Trends (% of Visitors)**



Statewide, 89 percent of all U.S. respondents answered that they would be “very likely” to recommend the islands as a vacation place to their friends and relatives, virtually the same as in 2002. A higher percentage of the Japanese visitors surveyed in 2003 responded that they would “very likely” recommend Hawaii (73.1%) compared to 69.7 percent in the previous year. Nearly 85 percent of the Canadian visitors surveyed and 80 percent of the European respondents would recommend the islands to their friends and relatives.

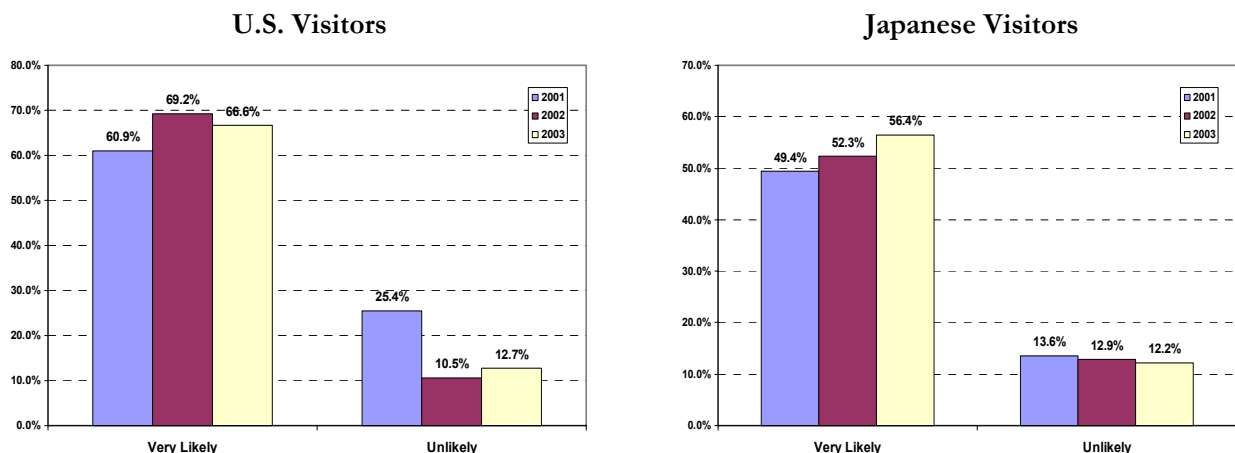
When asked about the likelihood of returning to Hawaii in the next five years, close to 67 percent of the 2003 U.S. respondents said that they would “very likely” do so. About 12.7 percent said that they would be “not too likely” or “not at all likely” to return. The top reason given by 2003 U.S. visitors who said that they would not revisit the islands was that Hawaii is “too expensive” (43.7%).

About 56.4 percent of the Japanese visitors surveyed in 2003 were “very likely” to return to the islands within the next five years, up from 52.3 percent in 2002. “The flight is too long” was the top answer given by the 2003 Japanese respondents who said that they would not likely return (43.8%). Hawaii is “too expensive” (26.3%) was the second reason given by the 2003 respondents.

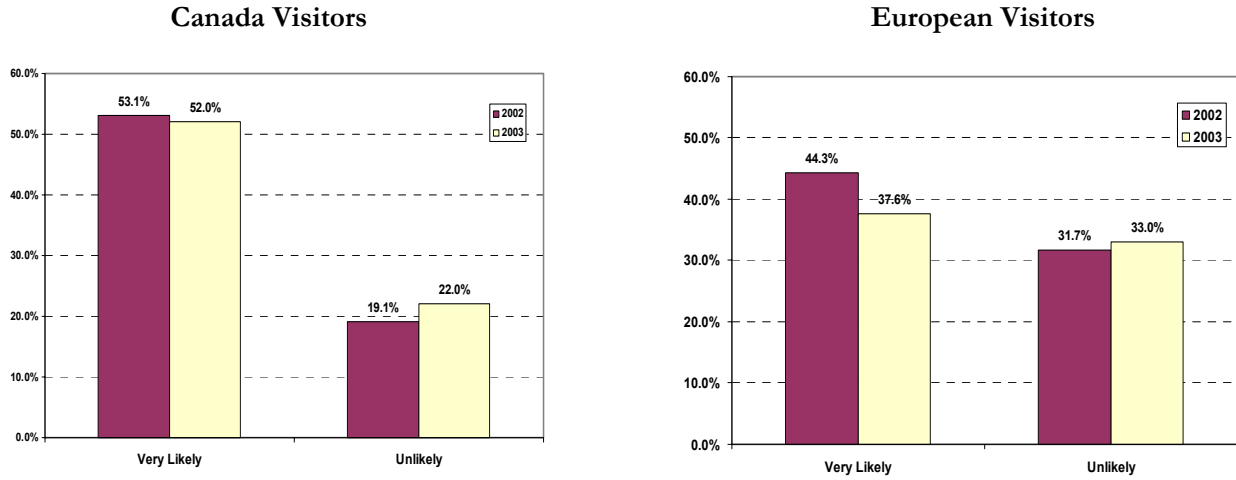
Over half (52.0%) of the Canadians polled in the 2003 survey will “very likely” return to Hawaii in the near future. Hawaii is “too expensive” was the response given by the majority (64.4%) of those who said that they would not likely revisit the islands, which was down from 76.1 percent in 2002.

Close to 38 percent of the European visitors surveyed in 2003 said that they will “very likely” return to the islands in the next five years. This percentage is down from 44 percent in 2002. Of those who would not likely come back, 60.5 percent responded that the main reason was that the “flight was too long”.

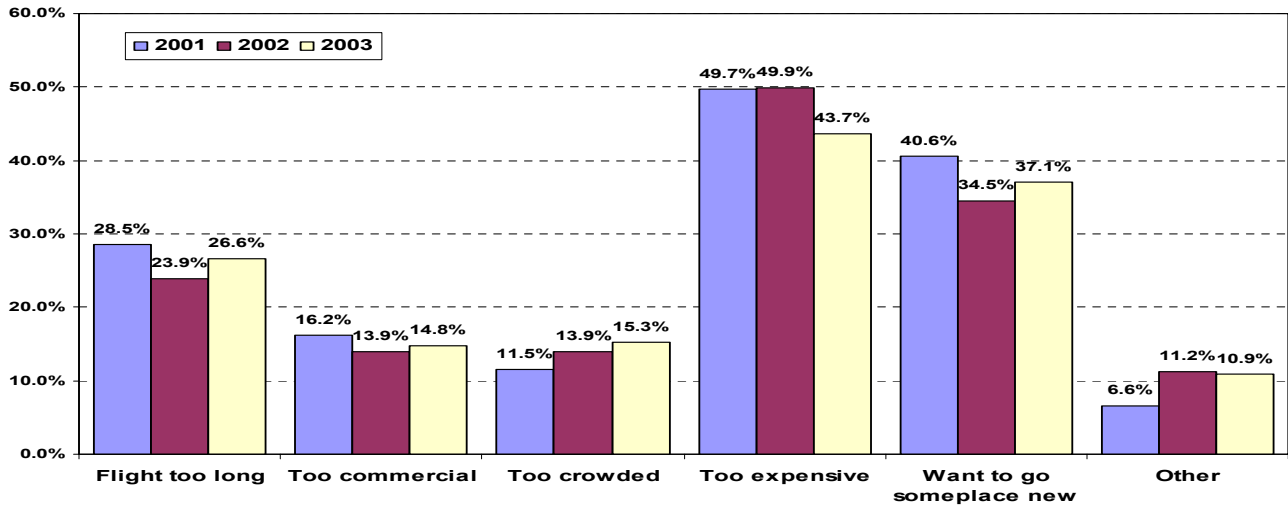
**Figure 2: Likelihood of Visiting Hawaii in the Next Five Years  
(% of visitors)**



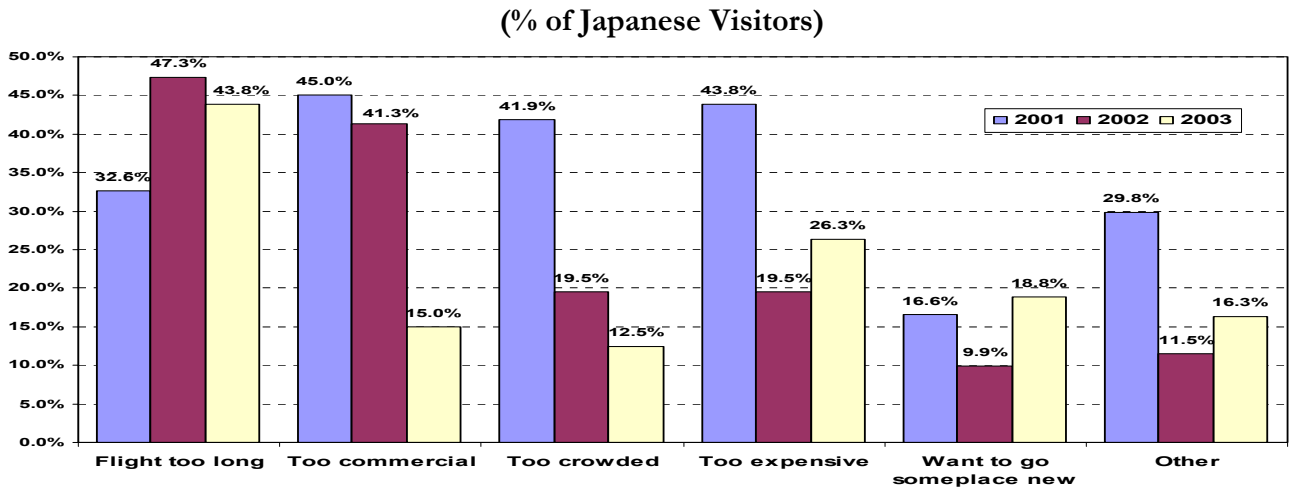
**Figure 3: Likelihood of Visiting Hawaii in the Next Five Years  
(% of visitors)**



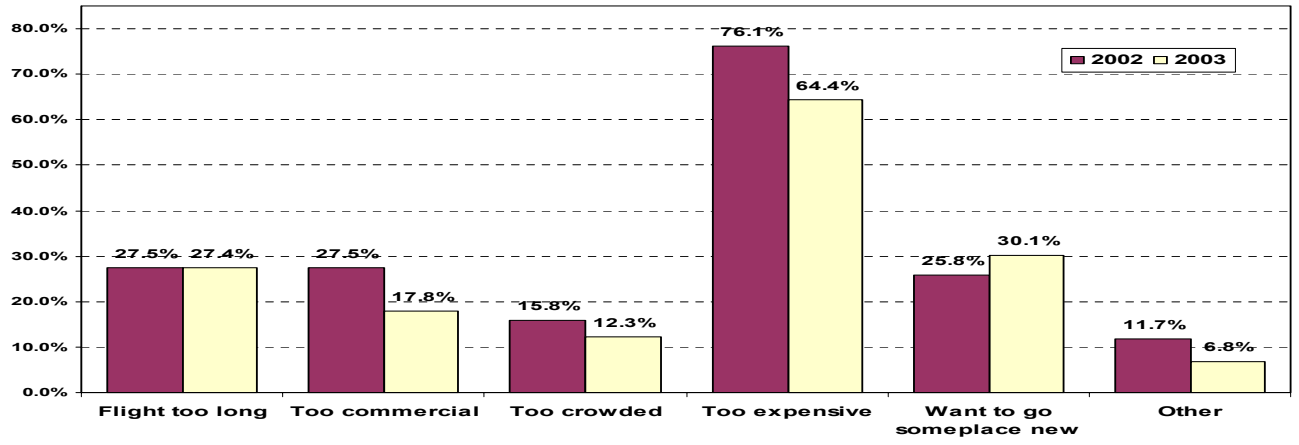
**Figure 4: Reasons for Not Revisiting Hawaii : U.S. Visitors  
(% of U.S. Visitors)**



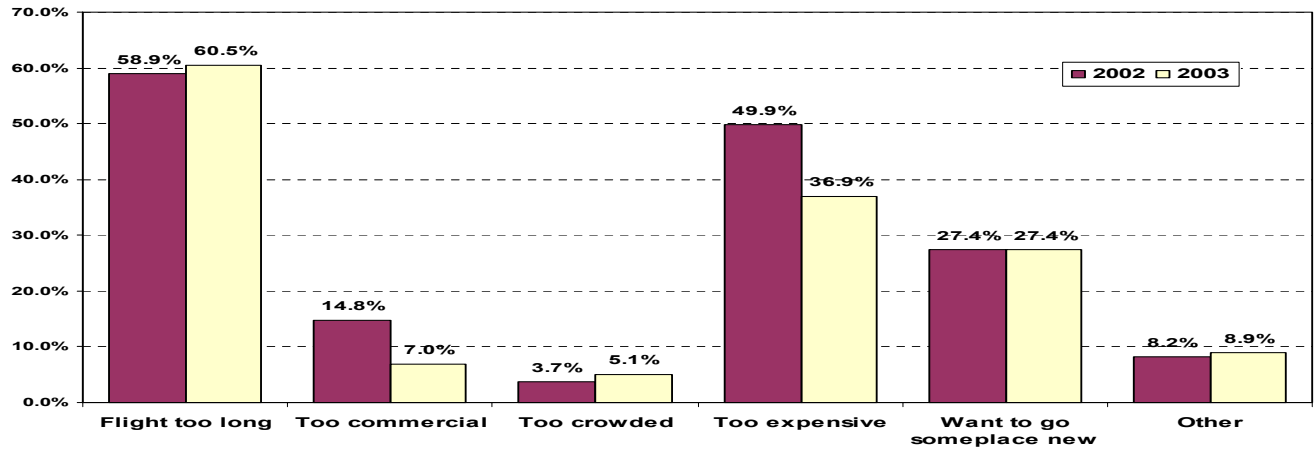
**Figure 5: Reasons for Not Revisiting Hawaii : Japanese Visitors**



**Figure 6: Reasons for Not Revisiting Hawaii : Canadian Visitors**  
(% of Canadian Visitors)



**Figure 7: Reasons for Not Revisiting Hawaii : European Visitors**  
(% of European Visitors)





### Satisfaction Rating by Island:

Each Hawaiian island continued to receive either “excellent” or “above average” ratings from about 90 percent of its visitors who responded to the 2003 survey.

The majority of the U.S. respondents in 2003 gave “excellent” marks to their stay on these islands. The percentage of “excellent” ratings was higher for Maui compared to 2002. Kauai received the highest percentage of “excellent” ratings, followed by Maui, the Big Island, Lanai, Oahu and Molokai.

“Excellent” ratings given by Japanese respondents who visited Oahu in 2003 were higher than those who visited this island in 2002. About 55 percent of the 2003 Japanese visitors surveyed gave “excellent” marks to Oahu, up by almost 5 percentage points.

Close to 73 percent of the Canadian respondents who visited Kauai in 2003 rated this island as “excellent” while 67 percent of those who went to Maui gave their experience the highest mark. Nearly 61 percent of the Canadian respondents who visited the Big Island and 59.4 percent of those who went to Oahu during the year rated these islands as “excellent”.

The majority of the European respondents who went to Kauai (71.3%), the Big Island (66.0%), Maui (65.6%), and/or Oahu (58.8%) in 2003 gave the island they visited “excellent” marks.

**Figure 8: Percentage of “Excellent” Satisfaction Ratings by Island: U.S. Visitors**

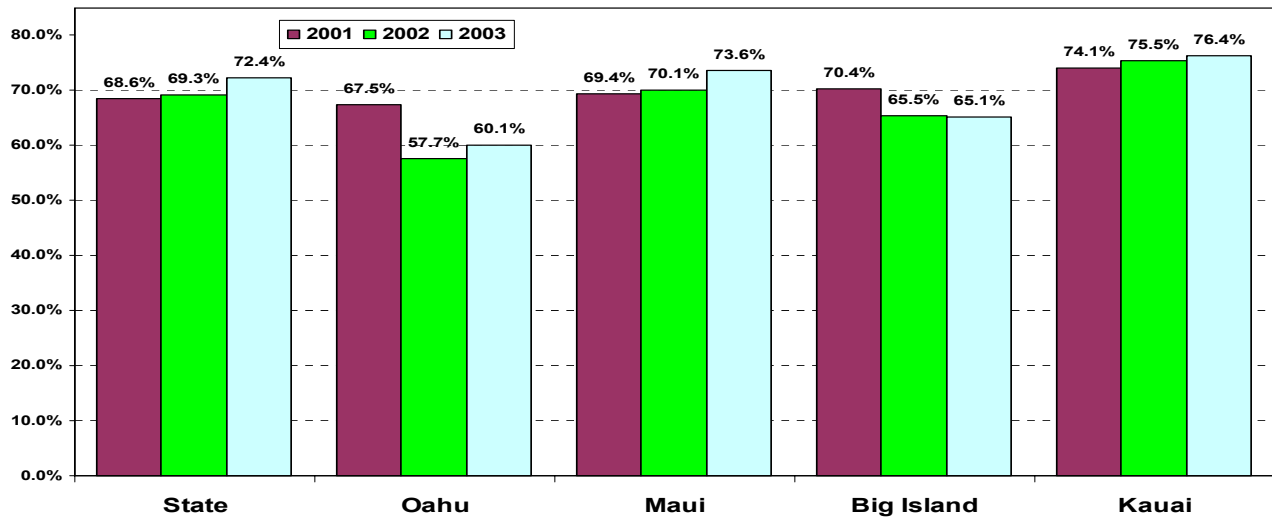


Figure 9: Percentage of “Excellent” Satisfaction Ratings by Island : Japanese Visitors

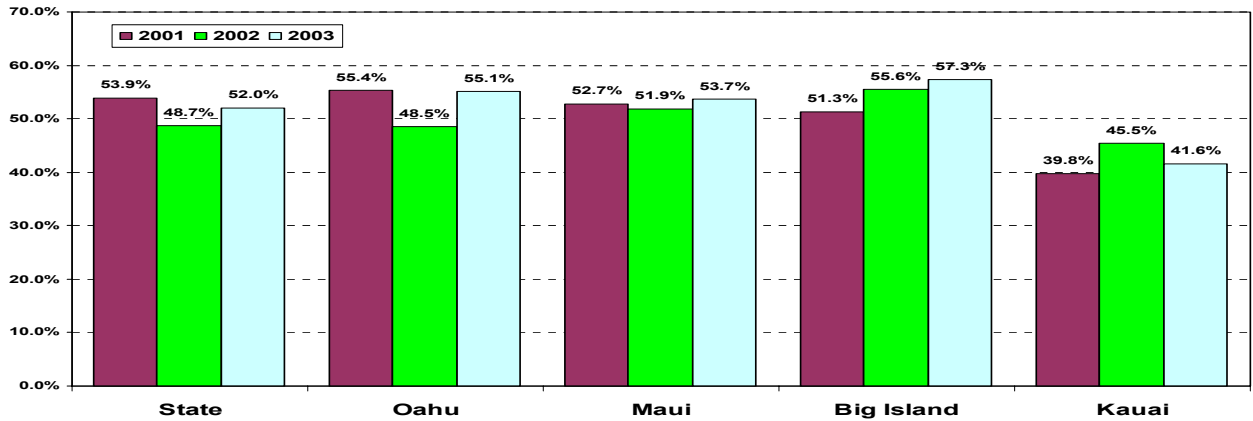


Figure 10: Percentage of “Excellent” Satisfaction Ratings by Island : Canadian Visitors

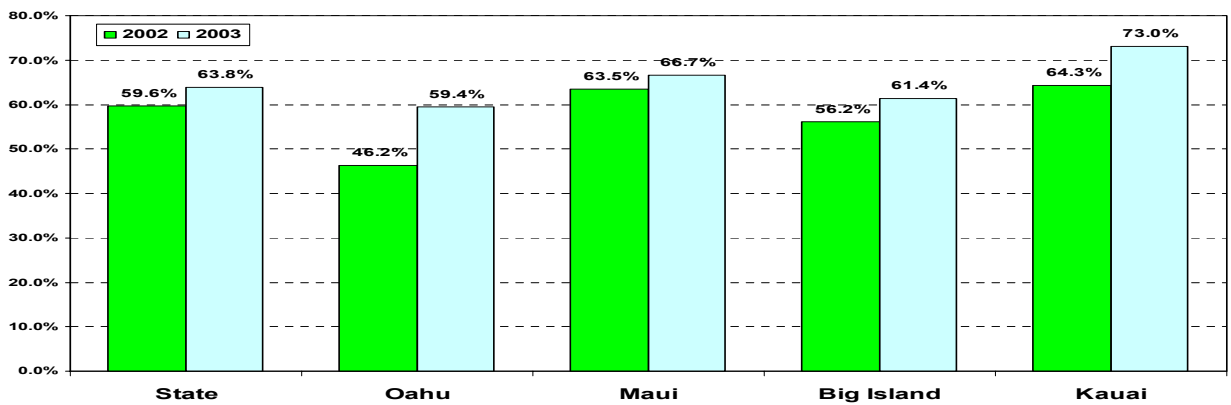
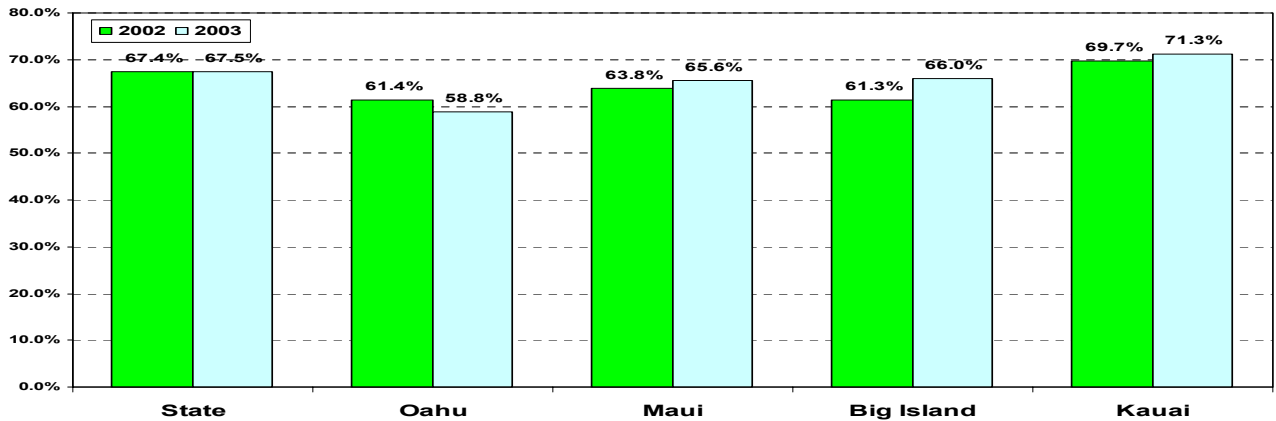


Figure 11: Percentage of “Excellent” Satisfaction Ratings by Island : European Visitors

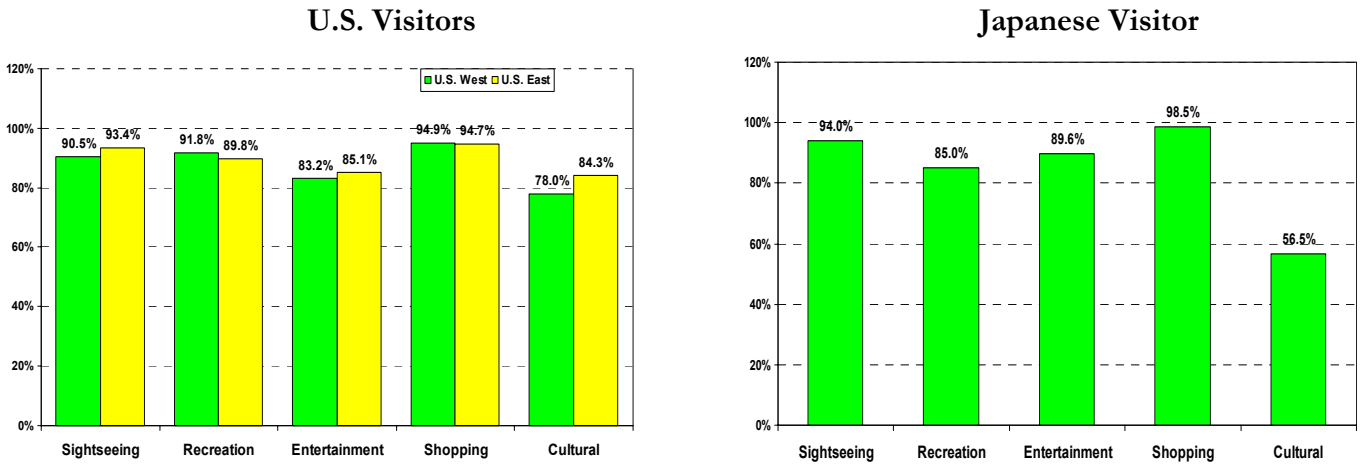


Participation in Activities:

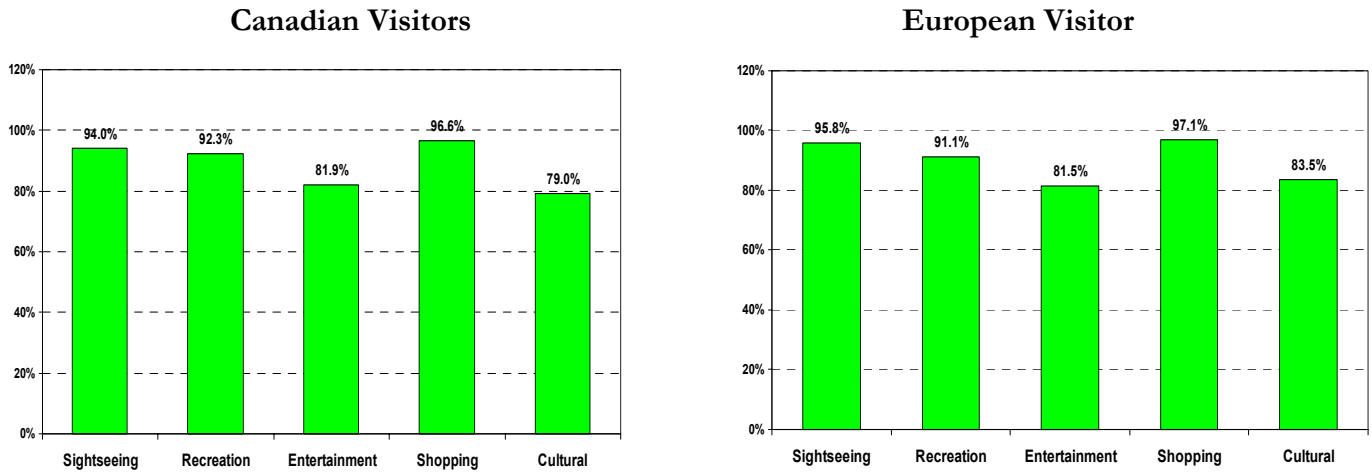
Hawaii offers a variety of activities for visitors. The survey queried visitors about their participation in the following types of activities while on each island: shopping, sightseeing, cultural, recreation, entertainment and transportation. The results show clear differences in the shopping habits, the mode of transportation used, and the types of activities chosen by U.S. and Japanese respondents, in particular, which will be detailed in a later section.

Similar to all respondents in 2002, shopping, sightseeing and recreation while in Hawaii continues to be the top three activities of those surveyed in 2003. Cultural activities were more popular with U.S., Canadian and European respondents compared with their Japanese counterparts.

**Figure 12: 2003 Activity Participation (% of Visitors)**



**Figure 13: 2003 Activity Participation (% of Visitors)**



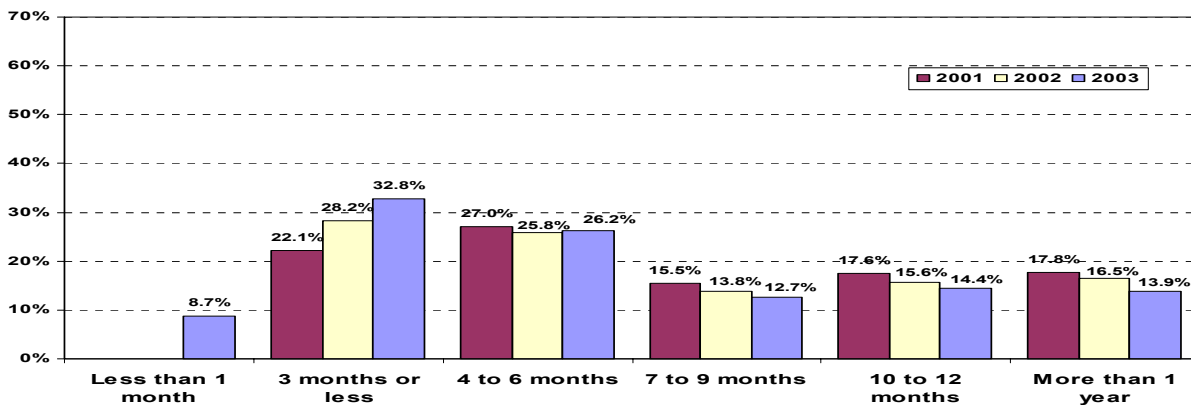
**Trip Planning and Booking Timetable:**

The survey also asked U.S., Japanese, Canadian and European visitors about how and when they made their travel plans. Results show that Japanese respondents have a much shorter planning and booking window than U.S., Canadian and European visitors.

Close to 58 percent of the Japanese visitors surveyed in 2003 took three months or less to decide to take a vacation, while 63.5 percent took three months or less to decide on Hawaii as a vacation destination, compared to 52.8 percent and 58.1 percent, respectively from those surveyed in 2002. The share of 2003 Japanese respondents who took less than one month to make these decisions is significantly higher compared to other visitors surveyed. “Less than 1 month” category was added in the 2003 survey.

In contrast, the majority of the U.S., Canadian and European respondents took more than three months to decide to take a vacation and to choose Hawaii as their destination.

**Figure 14: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure: U.S. Visitors (% of U.S. Visitors)**



**Figure 15: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure: Japanese Visitors (% of Japanese Visitors)**

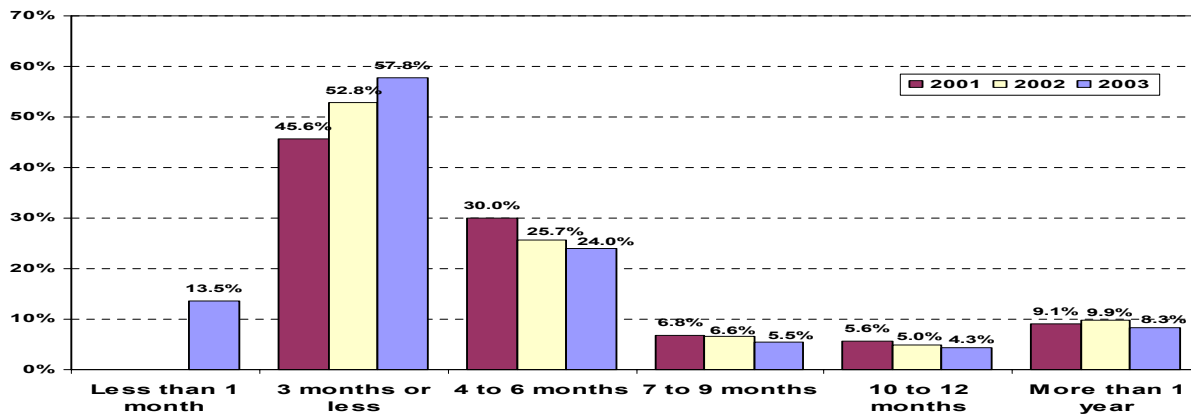


Figure 16: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure:  
Canadian Visitors (% of Canadian Visitors)

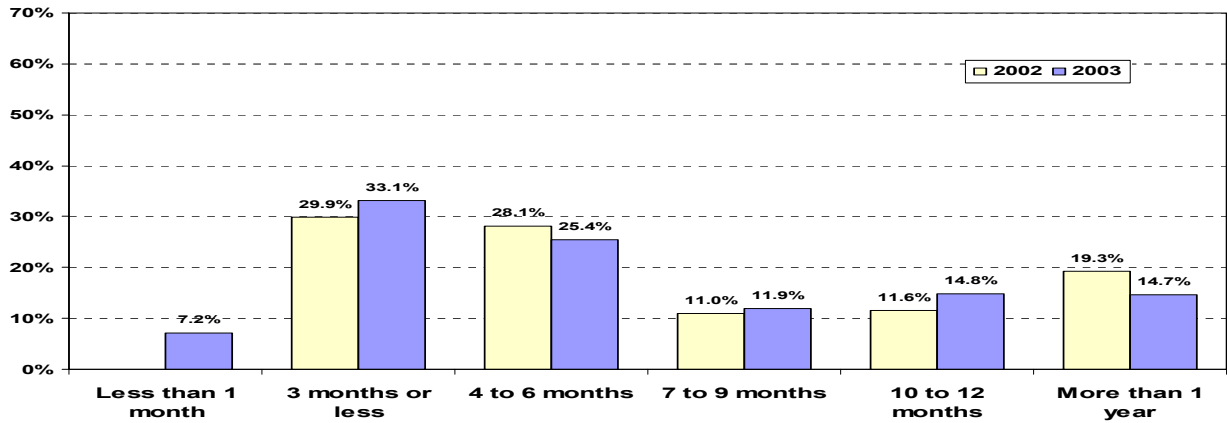


Figure 17: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure:  
European Visitors (% of European Visitors)

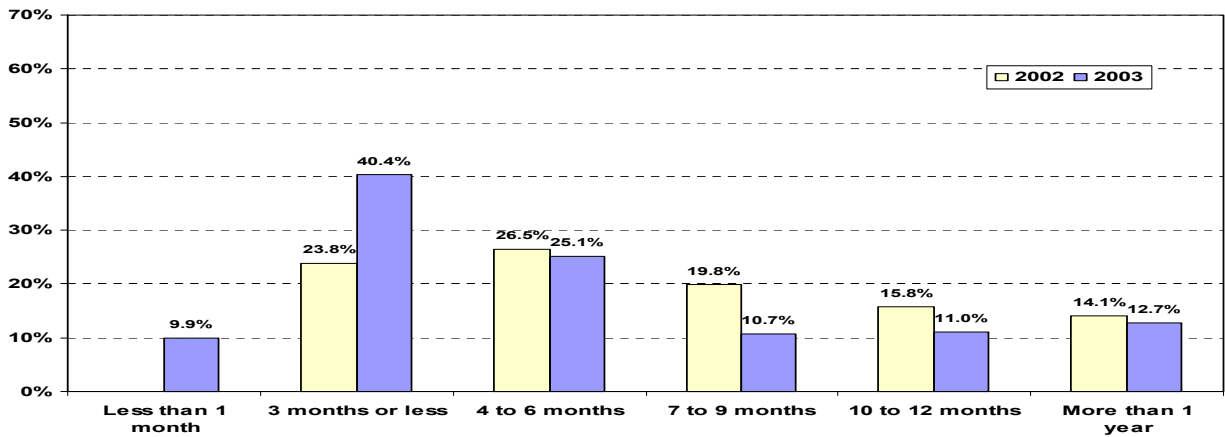


Figure 18: Timeframe in Deciding to Visit Hawaii Before Departure:  
U.S. Visitors (% of U.S. Visitors)

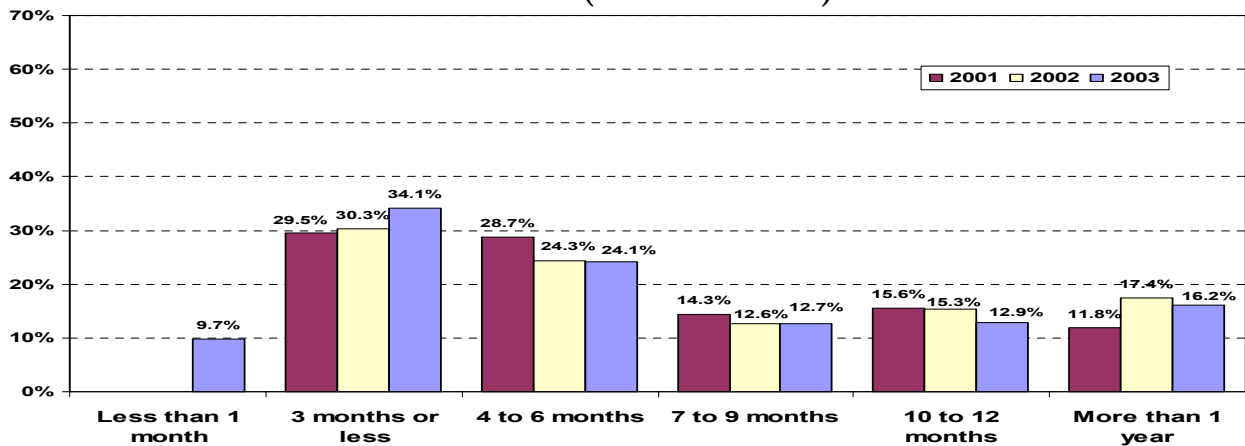


Figure 19: Timeframe in Deciding to Visit Hawaii Before Departure:  
Japanese Visitors (% of Japanese Visitors)

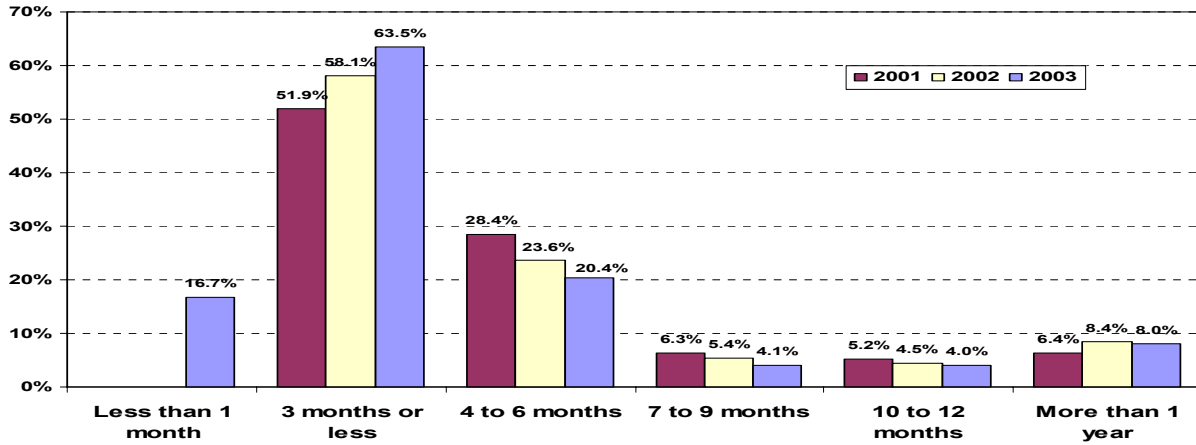


Figure 20: Timeframe in Deciding to Visit Hawaii Before Departure:  
Canadian Visitors (% of Canadian Visitors)

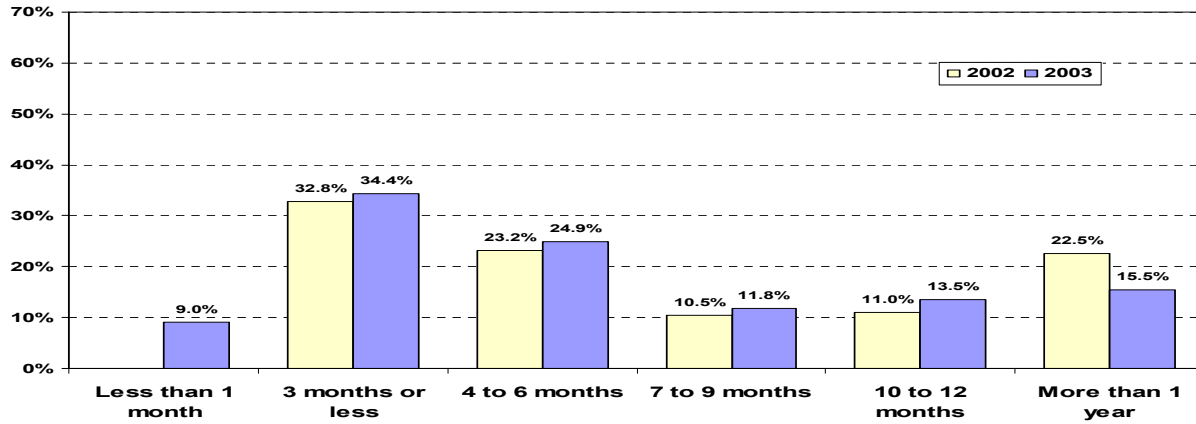
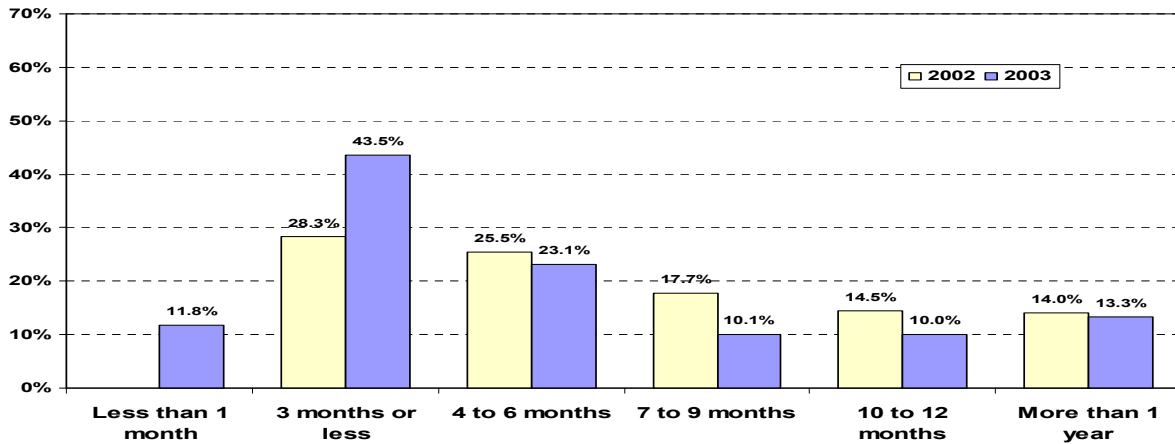


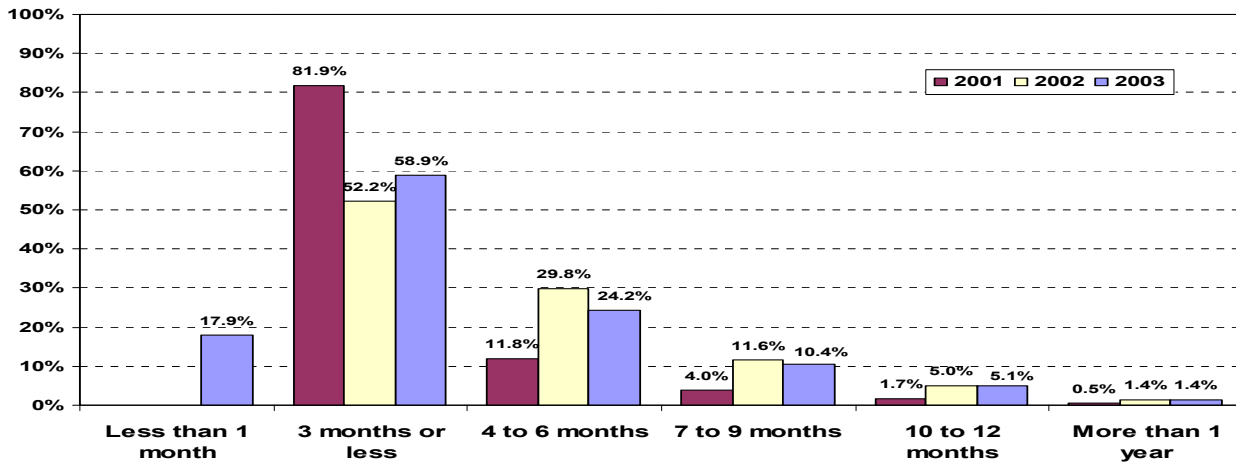
Figure 21: Timeframe in Deciding to Visit Hawaii Before Departure:  
European Visitors (% of European Visitors)



Close to 90 percent of the Japanese respondents purchased their tickets within three months or less before their trip, up from 87.4 percent in 2002. In contrast, about 59 percent of the U.S. visitors surveyed in 2003 purchased their tickets three months or less before their trip compared to 52.2 percent of the respondents in 2002.

Similar to the U.S. respondents, about 60 percent of the Canadian and 67.1 percent of the European respondents in 2003 purchased their tickets three months or less before their trip to the islands.

**Figure 22: Timeframe in Purchasing Tickets Before Departure:  
U.S. Visitors (% of U.S. Visitors)**



**Figure 23: Timeframe in Purchasing Tickets Before Departure:  
(% of Japanese Visitors)**

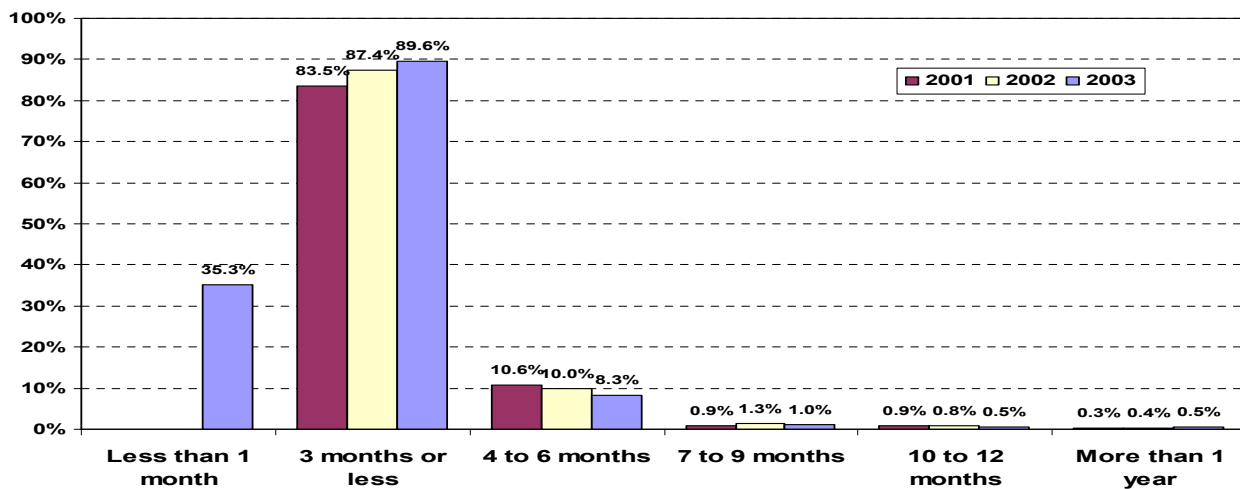


Figure 24: Timeframe in Purchasing Tickets Before Departure:  
Canadian Visitors (% of Canadian Visitors)

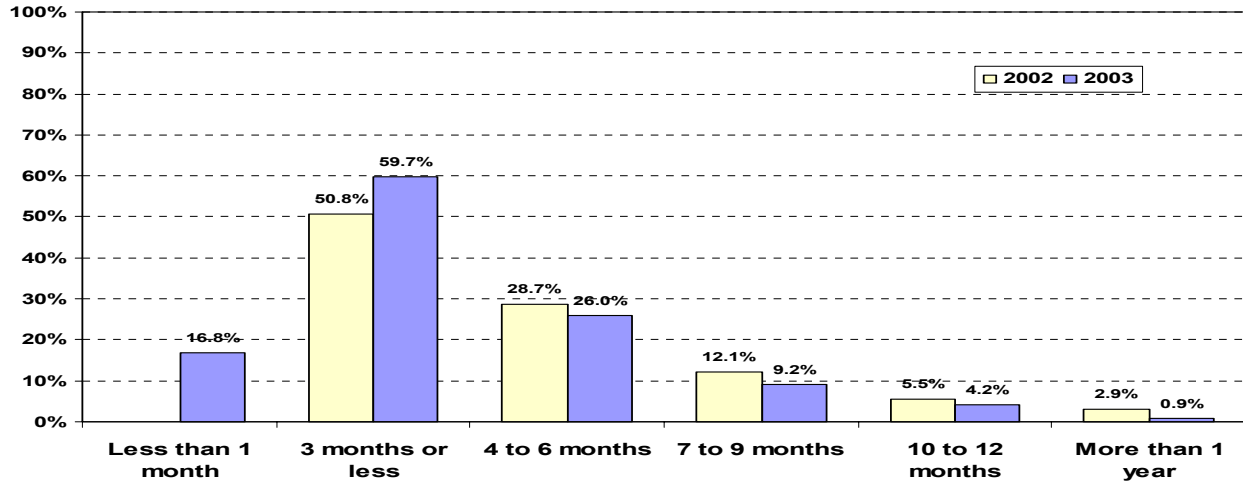
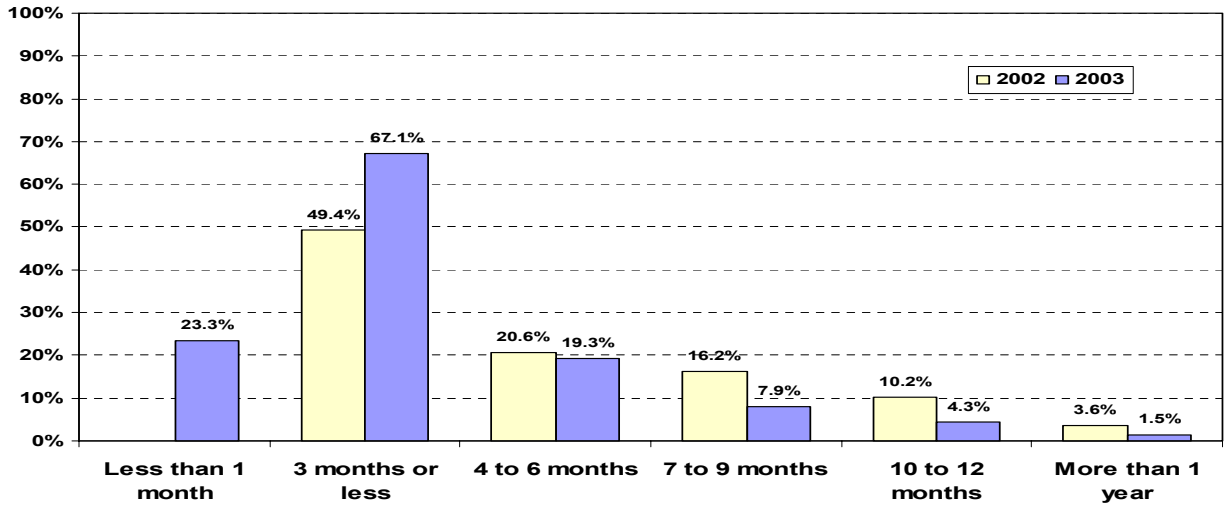


Figure 25: Timeframe in Purchasing Tickets Before Departure:  
European Visitors (% of European Visitors)





### 3. SATISFACTION AND RATING



## SATISFACTION AND RATING

The majority of the U.S. West and U.S. East visitors surveyed in 2003 awarded high ratings to their experiences with shopping, transportation, activities and attractions, accommodations, restaurants, golf, airports, parks and beaches while in Hawaii. The percentage of U.S. West and U.S. East respondents who were “very satisfied” with these experiences ranged from the high 50’s to nearly 80 percent. Visitors from Japan continue to be more critical. While fewer (20% to almost 50%) Japanese respondents gave “very satisfied” marks the majority was still “satisfied” with their experiences in Hawaii. Over half of the Canadian and European respondents gave “very satisfied” marks to most of their experiences in the islands. Across all visitor markets transportation received the highest dissatisfaction ratings.

In the following sections “senior” refers to visitors over 55 years of age, “middle age” includes visitors between 35 and 54 years old, “young” refers to visitors from 18 and 34 years of age and “family” includes visitors traveling with kids under 18 years of age.

**U.S. West Visitors:** A higher percentage of seniors were “very satisfied” with Hawaii’s accommodation, restaurants, transportation, airport and parks and beaches compared to other U.S. West respondents. The islands’ golf courses and activities and attractions received more “very satisfied” ratings from young visitors while more wedding/honeymoon visitors were “very satisfied” with shopping in Hawaii.

A higher percentage of repeat visitors surveyed were “very satisfied” with Hawaii’s accommodations, restaurants, shopping, golf courses, transportation, airports and parks and beaches than first time visitors from the U.S. West.

**U.S. East Visitors:** More seniors awarded “very satisfied” ratings to the islands’ accommodations, restaurants, shopping, transportation and airports than other U.S. East respondents. Hawaii’s golf courses received a greater percentage of “very satisfied” ratings from wedding/honeymoon visitors, while activities and attractions and parks and beaches received higher ratings from young people.

More repeat visitors were “very satisfied” with Hawaii’s accommodations, restaurants, golf courses, transportation and airports than first time visitors.

**Japanese Visitors:** Hawaii’s golf courses received a higher percentage of “very satisfied” ratings from younger visitors than from other Japanese respondents. A greater percentage of wedding and honeymoon visitors were “very satisfied” with their accommodations, restaurants, shopping, activities and attractions, transportation, airports, and parks and beaches.

More repeat visitors were “very satisfied” with the restaurants and golf courses than first time visitors from Japan.

**Canadian Visitors:** A higher percentage of seniors were “very satisfied” with the accommodations, restaurants, transportation and airports in Hawaii compared to other Canadian respondents. More middle age visitors were “very satisfied” with the shopping, golf courses and parks and beaches in the islands while more families were “very satisfied” with the activities and attractions.

A higher number of first time visitors were “very satisfied” with the shopping, golf courses, activities and attractions, parks and beaches and transportation than repeat visitors.

**European Visitors:** The islands’ accommodations, restaurants, shopping, golf courses, transportation, airports, and parks and beaches received a higher percentage of “very satisfied” ratings from senior European visitors than from other visitors from this market. A greater percentage of young people were “very satisfied” with activities and attractions in Hawaii.

More repeat visitors from Europe were “very satisfied” with everything but activities and attractions than first time visitors.

**TABLE 3.1 Overall Satisfaction by Major Category -- U.S. Total**  
(% of U.S. Total Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 78.1%          | 19.3%              | 2.1%                  | 0.5%                 |
| Restaurants              | 63.4%          | 33.0%              | 3.1%                  | 0.4%                 |
| Shopping                 | 64.8%          | 32.2%              | 2.7%                  | 0.3%                 |
| Golf Courses             | 74.4%          | 24.2%              | 1.0%                  | 0.4%                 |
| Activities & Attractions | 69.8%          | 28.0%              | 2.0%                  | 0.2%                 |
| Transportation           | 60.8%          | 31.1%              | 5.6%                  | 2.5%                 |
| Airports                 | 56.6%          | 37.0%              | 5.0%                  | 1.5%                 |
| Parks & Beaches          | 73.0%          | 24.1%              | 2.6%                  | 0.3%                 |

**TABLE 3.2 Overall Satisfaction by Major Category -- U.S. West**  
(% of U.S. West Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 76.9%          | 20.3%              | 2.5%                  | 0.3%                 |
| Restaurants              | 62.6%          | 33.6%              | 3.5%                  | 0.3%                 |
| Shopping                 | 64.5%          | 32.7%              | 2.6%                  | 0.3%                 |
| Golf Courses             | 68.8%          | 29.7%              | 1.1%                  | 0.4%                 |
| Activities & Attractions | 67.5%          | 30.5%              | 1.9%                  | 0.1%                 |
| Transportation           | 57.1%          | 34.2%              | 5.1%                  | 3.6%                 |
| Airports                 | 56.4%          | 36.9%              | 5.3%                  | 1.4%                 |
| Parks & Beaches          | 71.9%          | 25.7%              | 2.1%                  | 0.2%                 |

**TABLE 3.3 Overall Satisfaction by Major Category -- U.S. East**  
(% of U.S. East Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 79.4%          | 18.3%              | 1.6%                  | 0.7%                 |
| Restaurants              | 64.3%          | 32.4%              | 2.8%                  | 0.5%                 |
| Shopping                 | 65.1%          | 31.7%              | 2.8%                  | 0.4%                 |
| Golf Courses             | 81.5%          | 17.1%              | 0.9%                  | 0.5%                 |
| Activities & Attractions | 72.1%          | 25.6%              | 2.0%                  | 0.4%                 |
| Transportation           | 64.1%          | 28.4%              | 6.0%                  | 1.5%                 |
| Airports                 | 56.8%          | 37.1%              | 4.6%                  | 1.5%                 |
| Parks & Beaches          | 74.2%          | 22.3%              | 3.1%                  | 0.3%                 |

**TABLE 3.4 Overall Satisfaction by Major Category -- Japan**  
(% of Japanese Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 40.8%          | 48.5%              | 9.7%                  | 1.0%                 |
| Restaurants              | 22.1%          | 59.0%              | 17.3%                 | 1.5%                 |
| Shopping                 | 40.1%          | 50.0%              | 9.2%                  | 0.7%                 |
| Golf Courses             | 40.6%          | 47.0%              | 10.8%                 | 1.6%                 |
| Activities & Attractions | 34.7%          | 54.7%              | 10.2%                 | 0.4%                 |
| Transportation           | 35.3%          | 49.4%              | 12.8%                 | 2.4%                 |
| Airports                 | 20.2%          | 60.1%              | 18.3%                 | 1.3%                 |
| Parks & Beaches          | 48.1%          | 47.0%              | 4.6%                  | 0.3%                 |

**TABLE 3.5 Overall Satisfaction by Major Category -- Canada**  
(% of Canadian Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 70.2%          | 25.8%              | 3.3%                  | 0.7%                 |
| Restaurants              | 53.6%          | 41.7%              | 3.6%                  | 1.1%                 |
| Shopping                 | 56.4%          | 38.8%              | 4.3%                  | 0.5%                 |
| Golf Courses             | 64.6%          | 30.4%              | 2.5%                  | 2.5%                 |
| Activities & Attractions | 63.2%          | 33.4%              | 2.5%                  | 0.9%                 |
| Transportation           | 57.4%          | 33.1%              | 6.9%                  | 2.7%                 |
| Airports                 | 55.0%          | 38.3%              | 5.6%                  | 1.0%                 |
| Parks & Beaches          | 73.4%          | 23.4%              | 2.5%                  | 0.7%                 |

**TABLE 3.6 Overall Satisfaction by Major Category -- Europe**  
(% of European Visitors)

| Category                 | Very Satisfied | Somewhat Satisfied | Somewhat Dissatisfied | Not Satisfied at All |
|--------------------------|----------------|--------------------|-----------------------|----------------------|
| Accommodations           | 62.0%          | 33.7%              | 3.4%                  | 0.9%                 |
| Restaurants              | 46.7%          | 46.8%              | 5.9%                  | 0.6%                 |
| Shopping                 | 52.7%          | 42.8%              | 4.2%                  | 0.4%                 |
| Golf Courses             | 61.7%          | 32.6%              | 4.6%                  | 1.1%                 |
| Activities & Attractions | 54.0%          | 42.4%              | 3.4%                  | 0.3%                 |
| Transportation           | 53.2%          | 36.1%              | 8.0%                  | 2.7%                 |
| Airports                 | 43.0%          | 49.1%              | 7.0%                  | 0.9%                 |
| Parks & Beaches          | 69.6%          | 27.9%              | 2.2%                  | 0.3%                 |

**TABLE 3.7 Overall Satisfaction by Major Category and Lifestage: U.S. Total**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 69.1%                          | 79.7%  | 71.0% | 77.1%      | 84.1%   | 74.6%             | 80.1%              |
| Somewhat satisfied                  | 29.4%                          | 19.0%  | 25.5% | 19.3%      | 14.7%   | 22.0%             | 17.8%              |
| Somewhat dissatisfied               | 1.5%                           | 1.3%   | 3.0%  | 2.5%       | 1.3%    | 2.9%              | 1.7%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.4%  | 1.1%       | 0.0%    | 0.5%              | 0.4%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 57.4%                          | 62.6%  | 58.2% | 63.8%      | 68.0%   | 59.7%             | 65.5%              |
| Somewhat satisfied                  | 35.3%                          | 34.2%  | 37.0% | 32.6%      | 29.4%   | 36.5%             | 31.2%              |
| Somewhat dissatisfied               | 5.9%                           | 3.0%   | 4.5%  | 2.8%       | 2.5%    | 3.6%              | 2.8%               |
| Not satisfied at all                | 1.5%                           | 0.3%   | 0.2%  | 0.7%       | 0.2%    | 0.2%              | 0.5%               |
| <b>Shopping</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 62.7%                          | 64.7%  | 62.4% | 62.8%      | 69.7%   | 65.0%             | 64.8%              |
| Somewhat satisfied                  | 34.3%                          | 33.4%  | 34.4% | 33.3%      | 27.5%   | 32.6%             | 31.9%              |
| Somewhat dissatisfied               | 1.5%                           | 1.6%   | 2.7%  | 3.6%       | 2.7%    | 2.1%              | 3.0%               |
| Not satisfied at all                | 1.5%                           | 0.3%   | 0.4%  | 0.3%       | 0.2%    | 0.3%              | 0.3%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 62.5%                          | 77.9%  | 84.0% | 68.0%      | 75.7%   | 74.8%             | 74.8%              |
| Somewhat satisfied                  | 31.3%                          | 22.1%  | 14.7% | 30.3%      | 22.6%   | 22.0%             | 24.4%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 0.0%  | 1.7%       | 1.7%    | 1.6%              | 0.8%               |
| Not satisfied at all                | 6.3%                           | 0.0%   | 1.3%  | 0.0%       | 0.0%    | 1.6%              | 0.0%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 66.7%                          | 64.6%  | 75.8% | 70.9%      | 67.8%   | 72.2%             | 68.6%              |
| Somewhat satisfied                  | 33.3%                          | 32.7%  | 22.7% | 26.4%      | 30.5%   | 25.6%             | 29.2%              |
| Somewhat dissatisfied               | 0.0%                           | 2.4%   | 1.3%  | 2.4%       | 1.6%    | 1.9%              | 2.0%               |
| Not satisfied at all                | 0.0%                           | 0.3%   | 0.2%  | 0.3%       | 0.2%    | 0.3%              | 0.2%               |
| <b>Transportation</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 43.3%                          | 60.7%  | 54.0% | 61.1%      | 66.1%   | 59.7%             | 61.3%              |
| Somewhat satisfied                  | 40.0%                          | 33.3%  | 37.1% | 30.9%      | 26.1%   | 31.2%             | 31.2%              |
| Somewhat dissatisfied               | 6.7%                           | 4.2%   | 6.3%  | 5.1%       | 6.4%    | 6.7%              | 5.1%               |
| Not satisfied at all                | 10.0%                          | 1.8%   | 2.7%  | 2.9%       | 1.4%    | 2.5%              | 2.4%               |
| <b>Airports</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 51.5%                          | 55.5%  | 53.1% | 55.8%      | 61.6%   | 54.0%             | 57.8%              |
| Somewhat satisfied                  | 39.4%                          | 37.6%  | 42.7% | 37.9%      | 31.0%   | 40.0%             | 35.6%              |
| Somewhat dissatisfied               | 9.1%                           | 6.0%   | 3.3%  | 4.6%       | 5.6%    | 4.7%              | 5.0%               |
| Not satisfied at all                | 0.0%                           | 1.0%   | 0.8%  | 1.7%       | 1.9%    | 1.2%              | 1.6%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 70.8%                          | 70.1%  | 77.2% | 70.2%      | 76.2%   | 73.2%             | 73.4%              |
| Somewhat satisfied                  | 23.1%                          | 28.1%  | 21.3% | 26.0%      | 21.0%   | 23.4%             | 24.0%              |
| Somewhat dissatisfied               | 6.2%                           | 1.8%   | 1.3%  | 3.5%       | 2.2%    | 3.2%              | 2.3%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.2%  | 0.4%       | 0.5%    | 0.3%              | 0.3%               |

**TABLE 3.8 Overall Satisfaction by Major Category and Lifestage: U.S. West**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 62.2%                          | 77.4%  | 71.5% | 77.0%      | 81.2%   | 70.9%             | 78.5%              |
| Somewhat satisfied                  | 35.1%                          | 20.6%  | 25.7% | 18.9%      | 17.4%   | 25.1%             | 19.1%              |
| Somewhat dissatisfied               | 2.7%                           | 2.1%   | 2.3%  | 3.4%       | 1.3%    | 3.6%              | 2.2%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.5%  | 0.7%       | 0.0%    | 0.4%              | 0.2%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 58.3%                          | 59.2%  | 57.2% | 64.4%      | 66.8%   | 59.2%             | 63.7%              |
| Somewhat satisfied                  | 36.1%                          | 38.0%  | 37.4% | 31.6%      | 30.3%   | 37.0%             | 32.7%              |
| Somewhat dissatisfied               | 5.6%                           | 2.4%   | 5.4%  | 3.5%       | 2.6%    | 3.9%              | 3.1%               |
| Not satisfied at all                | 0.0%                           | 0.4%   | 0.0%  | 0.5%       | 0.3%    | 0.0%              | 0.4%               |
| <b>Shopping</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 71.4%                          | 62.8%  | 64.0% | 61.8%      | 69.5%   | 64.3%             | 64.5%              |
| Somewhat satisfied                  | 22.9%                          | 36.4%  | 32.2% | 34.3%      | 28.0%   | 32.7%             | 32.8%              |
| Somewhat dissatisfied               | 2.9%                           | 0.4%   | 3.8%  | 3.9%       | 2.1%    | 3.0%              | 2.3%               |
| Not satisfied at all                | 2.9%                           | 0.4%   | 0.0%  | 0.0%       | 0.4%    | 0.0%              | 0.3%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 45.5%                          | 67.2%  | 77.8% | 63.2%      | 76.9%   | 62.5%             | 70.6%              |
| Somewhat satisfied                  | 45.5%                          | 32.8%  | 22.2% | 34.7%      | 21.5%   | 32.5%             | 28.6%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 0.0%  | 2.1%       | 1.5%    | 2.5%              | 0.9%               |
| Not satisfied at all                | 9.1%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.5%              | 0.0%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 71.9%                          | 59.3%  | 73.6% | 70.3%      | 65.0%   | 70.4%             | 66.7%              |
| Somewhat satisfied                  | 28.1%                          | 37.3%  | 25.5% | 27.9%      | 33.1%   | 27.0%             | 31.5%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 0.0%  | 2.1%       | 1.5%    | 2.2%              | 1.8%               |
| Not satisfied at all                | 0.0%                           | 0.4%   | 0.0%  | 0.0%       | 0.0%    | 0.4%              | 0.0%               |
| <b>Transportation</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 25.0%                          | 55.9%  | 54.3% | 57.2%      | 62.1%   | 52.9%             | 57.9%              |
| Somewhat satisfied                  | 50.0%                          | 38.2%  | 36.2% | 34.0%      | 29.8%   | 34.7%             | 34.4%              |
| Somewhat dissatisfied               | 12.5%                          | 3.9%   | 5.3%  | 5.7%       | 4.8%    | 6.6%              | 4.8%               |
| Not satisfied at all                | 12.5%                          | 2.0%   | 4.3%  | 3.1%       | 3.2%    | 5.8%              | 2.9%               |
| <b>Airports</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 51.4%                          | 53.5%  | 51.6% | 57.4%      | 60.9%   | 53.0%             | 57.5%              |
| Somewhat satisfied                  | 40.0%                          | 38.2%  | 42.9% | 36.9%      | 32.1%   | 39.1%             | 36.1%              |
| Somewhat dissatisfied               | 8.6%                           | 7.1%   | 4.6%  | 4.2%       | 5.4%    | 6.8%              | 4.9%               |
| Not satisfied at all                | 0.0%                           | 1.2%   | 0.9%  | 1.4%       | 1.6%    | 1.1%              | 1.5%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 73.5%                          | 67.6%  | 76.4% | 69.2%      | 76.8%   | 69.0%             | 73.2%              |
| Somewhat satisfied                  | 20.6%                          | 31.2%  | 22.2% | 27.8%      | 21.0%   | 27.7%             | 24.8%              |
| Somewhat dissatisfied               | 5.9%                           | 1.2%   | 1.4%  | 2.7%       | 1.4%    | 2.9%              | 1.8%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.0%  | 0.2%       | 0.7%    | 0.4%              | 0.2%               |

**TABLE 3.9 Overall Satisfaction by Major Category and Lifestage: U.S. East**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 77.4%                          | 83.7%  | 70.6% | 77.3%      | 86.6%   | 76.5%             | 82.3%              |
| Somewhat satisfied                  | 22.6%                          | 16.3%  | 25.4% | 19.6%      | 12.2%   | 20.4%             | 16.0%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 3.6%  | 1.5%       | 1.2%    | 2.5%              | 0.9%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.4%  | 1.5%       | 0.0%    | 0.6%              | 0.8%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 56.3%                          | 68.2%  | 59.1% | 63.3%      | 69.0%   | 60.0%             | 68.2%              |
| Somewhat satisfied                  | 34.4%                          | 27.7%  | 36.7% | 33.8%      | 28.6%   | 36.3%             | 29.0%              |
| Somewhat dissatisfied               | 6.3%                           | 4.1%   | 3.8%  | 2.0%       | 2.4%    | 3.4%              | 2.3%               |
| Not satisfied at all                | 3.1%                           | 0.0%   | 0.4%  | 1.0%       | 0.0%    | 0.4%              | 0.6%               |
| <b>Shopping</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 53.1%                          | 68.1%  | 61.1% | 63.9%      | 69.8%   | 65.4%             | 65.2%              |
| Somewhat satisfied                  | 46.9%                          | 28.3%  | 36.4% | 32.4%      | 27.0%   | 32.5%             | 30.6%              |
| Somewhat dissatisfied               | 0.0%                           | 3.6%   | 1.7%  | 3.2%       | 3.2%    | 1.6%              | 3.9%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.8%  | 0.5%       | 0.0%    | 0.4%              | 0.3%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 100.0%                         | 94.6%  | 89.7% | 73.8%      | 74.0%   | 80.7%             | 82.3%              |
| Somewhat satisfied                  | 0.0%                           | 5.4%   | 7.7%  | 25.0%      | 24.0%   | 16.9%             | 16.9%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 0.0%  | 1.3%       | 2.0%    | 1.2%              | 0.8%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 2.6%  | 0.0%       | 0.0%    | 1.2%              | 0.0%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 61.3%                          | 73.9%  | 77.5% | 71.5%      | 70.1%   | 73.2%             | 71.3%              |
| Somewhat satisfied                  | 38.7%                          | 24.6%  | 20.5% | 25.0%      | 28.2%   | 24.9%             | 26.0%              |
| Somewhat dissatisfied               | 0.0%                           | 1.4%   | 1.6%  | 2.9%       | 1.3%    | 1.7%              | 2.2%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.4%  | 0.5%       | 0.3%    | 0.2%              | 0.5%               |
| <b>Transportation</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 64.3%                          | 68.2%  | 53.8% | 64.4%      | 69.0%   | 62.5%             | 65.8%              |
| Somewhat satisfied                  | 28.6%                          | 25.8%  | 37.7% | 28.3%      | 23.4%   | 29.7%             | 27.1%              |
| Somewhat dissatisfied               | 0.0%                           | 4.5%   | 6.9%  | 4.7%       | 7.6%    | 6.7%              | 5.4%               |
| Not satisfied at all                | 7.1%                           | 1.5%   | 1.5%  | 2.6%       | 0.0%    | 1.1%              | 1.7%               |
| <b>Airports</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 51.6%                          | 58.8%  | 54.4% | 54.0%      | 62.3%   | 54.5%             | 58.4%              |
| Somewhat satisfied                  | 38.7%                          | 36.5%  | 42.5% | 38.9%      | 29.9%   | 40.5%             | 34.8%              |
| Somewhat dissatisfied               | 9.7%                           | 4.1%   | 2.3%  | 5.1%       | 5.7%    | 3.6%              | 5.2%               |
| Not satisfied at all                | 0.0%                           | 0.7%   | 0.8%  | 2.0%       | 2.1%    | 1.3%              | 1.7%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 67.7%                          | 74.3%  | 77.8% | 71.3%      | 75.7%   | 75.4%             | 73.6%              |
| Somewhat satisfied                  | 25.8%                          | 23.0%  | 20.6% | 23.9%      | 21.0%   | 21.1%             | 23.0%              |
| Somewhat dissatisfied               | 6.5%                           | 2.7%   | 1.2%  | 4.3%       | 3.0%    | 3.3%              | 2.9%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.4%  | 0.5%       | 0.3%    | 0.2%              | 0.5%               |



**TABLE 3.10 Overall Satisfaction by Major Category and Lifestage: Japan**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         |        | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|--------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | Others | First<br>Timers   | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 52.3%                          | 41.2%  | 40.7% | 40.6%      | 38.0%   | 40.9%  | 40.9%             | 40.5%              |
| Somewhat satisfied                  | 40.8%                          | 48.1%  | 47.7% | 47.1%      | 53.5%   | 48.4%  | 48.4%             | 48.9%              |
| Somewhat dissatisfied               | 6.2%                           | 10.5%  | 10.2% | 10.8%      | 7.4%    | 9.6%   | 9.6%              | 9.7%               |
| Not satisfied at all                | 0.8%                           | 0.3%   | 1.4%  | 1.5%       | 1.2%    | 1.1%   | 1.1%              | 0.9%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 29.5%                          | 21.9%  | 25.3% | 22.2%      | 17.1%   | 20.4%  | 20.4%             | 23.4%              |
| Somewhat satisfied                  | 54.3%                          | 59.2%  | 58.4% | 57.9%      | 62.1%   | 56.1%  | 56.1%             | 60.7%              |
| Somewhat dissatisfied               | 15.5%                          | 17.0%  | 15.5% | 18.0%      | 19.6%   | 21.3%  | 21.3%             | 14.9%              |
| Not satisfied at all                | 0.8%                           | 1.9%   | 0.8%  | 1.9%       | 1.2%    | 2.1%   | 2.1%              | 1.0%               |
| <b>Shopping</b>                     |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 57.7%                          | 39.8%  | 51.6% | 36.7%      | 27.6%   | 40.7%  | 40.7%             | 40.5%              |
| Somewhat satisfied                  | 40.0%                          | 49.9%  | 42.3% | 52.2%      | 58.8%   | 48.8%  | 48.8%             | 50.3%              |
| Somewhat dissatisfied               | 2.3%                           | 9.6%   | 5.7%  | 10.0%      | 12.9%   | 9.8%   | 9.8%              | 8.4%               |
| Not satisfied at all                | 0.0%                           | 0.7%   | 0.4%  | 1.2%       | 0.7%    | 0.7%   | 0.7%              | 0.8%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 47.1%                          | 41.5%  | 48.1% | 30.6%      | 45.8%   | 36.3%  | 36.3%             | 42.4%              |
| Somewhat satisfied                  | 47.1%                          | 45.9%  | 40.7% | 52.2%      | 45.1%   | 46.3%  | 46.3%             | 47.7%              |
| Somewhat dissatisfied               | 5.9%                           | 10.4%  | 11.1% | 14.2%      | 8.5%    | 15.0%  | 15.0%             | 8.7%               |
| Not satisfied at all                | 0.0%                           | 2.2%   | 0.0%  | 3.0%       | 0.7%    | 2.5%   | 2.5%              | 1.2%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 44.3%                          | 33.9%  | 43.8% | 31.3%      | 25.7%   | 38.3%  | 38.3%             | 34.2%              |
| Somewhat satisfied                  | 50.0%                          | 55.8%  | 49.1% | 56.7%      | 58.7%   | 52.0%  | 52.0%             | 54.9%              |
| Somewhat dissatisfied               | 5.7%                           | 9.7%   | 6.5%  | 11.5%      | 15.6%   | 9.3%   | 9.3%              | 10.5%              |
| Not satisfied at all                | 0.0%                           | 0.6%   | 0.6%  | 0.4%       | 0.0%    | 0.4%   | 0.4%              | 0.4%               |
| <b>Transportation</b>               |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 46.5%                          | 33.0%  | 38.7% | 32.5%      | 35.2%   | 40.5%  | 40.5%             | 32.7%              |
| Somewhat satisfied                  | 46.5%                          | 50.1%  | 47.1% | 49.1%      | 52.6%   | 45.5%  | 45.5%             | 50.8%              |
| Somewhat dissatisfied               | 6.3%                           | 14.1%  | 11.2% | 16.5%      | 10.1%   | 12.4%  | 12.4%             | 13.4%              |
| Not satisfied at all                | 0.8%                           | 2.8%   | 3.0%  | 2.0%       | 2.1%    | 1.7%   | 1.7%              | 3.0%               |
| <b>Airports</b>                     |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 24.0%                          | 20.0%  | 23.6% | 17.9%      | 18.1%   | 22.9%  | 22.9%             | 18.7%              |
| Somewhat satisfied                  | 60.5%                          | 61.3%  | 59.3% | 60.4%      | 59.3%   | 59.0%  | 59.0%             | 61.4%              |
| Somewhat dissatisfied               | 14.0%                          | 17.8%  | 15.5% | 20.4%      | 20.8%   | 16.5%  | 16.5%             | 18.8%              |
| Not satisfied at all                | 1.6%                           | 0.9%   | 1.5%  | 1.3%       | 1.8%    | 1.6%   | 1.6%              | 1.0%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |        |                   |                    |
| Very satisfied                      | 60.3%                          | 49.4%  | 54.5% | 45.0%      | 40.3%   | 53.8%  | 53.8%             | 45.9%              |
| Somewhat satisfied                  | 38.1%                          | 46.4%  | 41.6% | 48.8%      | 53.8%   | 42.8%  | 42.8%             | 48.6%              |
| Somewhat dissatisfied               | 1.6%                           | 4.0%   | 3.5%  | 5.9%       | 5.7%    | 3.4%   | 3.4%              | 5.2%               |
| Not satisfied at all                | 0.0%                           | 0.2%   | 0.5%  | 0.3%       | 0.2%    | 0.1%   | 0.1%              | 0.3%               |

**TABLE 3.11 Overall Satisfaction by Major Category and Lifestage: Canada**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First Timers      | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 65.7%                          | 71.7%  | 62.1% | 71.8%      | 72.1%   | 65.8%             | 74.2%              |
| Somewhat satisfied                  | 31.4%                          | 22.8%  | 32.8% | 25.1%      | 23.8%   | 30.2%             | 22.0%              |
| Somewhat dissatisfied               | 2.9%                           | 3.3%   | 3.4%  | 3.1%       | 3.7%    | 3.2%              | 3.1%               |
| Not satisfied at all                | 0.0%                           | 2.2%   | 1.7%  | 0.0%       | 0.4%    | 0.8%              | 0.7%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 39.5%                          | 50.5%  | 42.1% | 57.8%      | 59.7%   | 51.1%             | 55.6%              |
| Somewhat satisfied                  | 55.3%                          | 45.2%  | 52.5% | 37.8%      | 35.4%   | 44.2%             | 39.4%              |
| Somewhat dissatisfied               | 2.6%                           | 4.3%   | 4.4%  | 3.2%       | 3.8%    | 3.3%              | 4.1%               |
| Not satisfied at all                | 2.6%                           | 0.0%   | 1.1%  | 1.2%       | 1.1%    | 1.4%              | 0.9%               |
| <b>Shopping</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 52.8%                          | 58.9%  | 49.7% | 59.4%      | 57.3%   | 57.4%             | 56.0%              |
| Somewhat satisfied                  | 44.4%                          | 34.4%  | 44.6% | 36.1%      | 38.4%   | 38.6%             | 38.4%              |
| Somewhat dissatisfied               | 2.8%                           | 5.6%   | 5.1%  | 4.1%       | 3.9%    | 3.7%              | 5.0%               |
| Not satisfied at all                | 0.0%                           | 1.1%   | 0.6%  | 0.4%       | 0.4%    | 0.3%              | 0.7%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 69.2%                          | 55.6%  | 51.9% | 73.3%      | 67.3%   | 65.4%             | 65.0%              |
| Somewhat satisfied                  | 30.8%                          | 33.3%  | 40.7% | 26.7%      | 25.5%   | 32.7%             | 29.1%              |
| Somewhat dissatisfied               | 0.0%                           | 0.0%   | 7.4%  | 0.0%       | 3.6%    | 1.9%              | 1.9%               |
| Not satisfied at all                | 0.0%                           | 11.1%  | 0.0%  | 0.0%       | 3.6%    | 0.0%              | 3.9%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 61.1%                          | 66.3%  | 60.8% | 62.6%      | 63.2%   | 65.7%             | 60.9%              |
| Somewhat satisfied                  | 38.9%                          | 23.6%  | 36.4% | 35.3%      | 34.2%   | 30.6%             | 35.9%              |
| Somewhat dissatisfied               | 0.0%                           | 9.0%   | 0.6%  | 1.7%       | 2.2%    | 2.2%              | 2.7%               |
| Not satisfied at all                | 0.0%                           | 1.1%   | 2.3%  | 0.4%       | 0.4%    | 1.4%              | 0.5%               |
| <b>Transportation</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 46.7%                          | 52.1%  | 45.9% | 60.5%      | 63.6%   | 58.2%             | 57.7%              |
| Somewhat satisfied                  | 53.3%                          | 35.4%  | 41.3% | 30.2%      | 28.9%   | 35.3%             | 30.1%              |
| Somewhat dissatisfied               | 0.0%                           | 8.3%   | 9.2%  | 6.8%       | 5.8%    | 3.9%              | 9.2%               |
| Not satisfied at all                | 0.0%                           | 4.2%   | 3.7%  | 2.5%       | 1.7%    | 2.6%              | 2.9%               |
| <b>Airports</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 52.6%                          | 51.1%  | 41.5% | 52.9%      | 65.9%   | 54.5%             | 55.4%              |
| Somewhat satisfied                  | 31.6%                          | 41.5%  | 49.7% | 39.8%      | 30.4%   | 38.4%             | 38.0%              |
| Somewhat dissatisfied               | 13.2%                          | 5.3%   | 7.7%  | 5.8%       | 3.7%    | 6.3%              | 5.3%               |
| Not satisfied at all                | 2.6%                           | 2.1%   | 1.1%  | 1.5%       | 0.0%    | 0.8%              | 1.3%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 75.0%                          | 72.5%  | 71.0% | 78.6%      | 68.1%   | 75.4%             | 72.3%              |
| Somewhat satisfied                  | 22.2%                          | 19.8%  | 27.4% | 19.8%      | 27.6%   | 22.7%             | 23.5%              |
| Somewhat dissatisfied               | 2.8%                           | 5.5%   | 1.6%  | 1.2%       | 3.1%    | 1.7%              | 3.1%               |
| Not satisfied at all                | 0.0%                           | 2.2%   | 0.0%  | 0.4%       | 1.2%    | 0.3%              | 1.1%               |

**TABLE 3.12 Overall Satisfaction by Major Category and Lifestage: Europe**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Category                            | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-------------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                     | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| <b>Accommodations</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 51.7%                          | 63.3%  | 53.7% | 62.3%      | 70.8%   | 60.9%             | 62.7%              |
| Somewhat satisfied                  | 37.9%                          | 32.0%  | 41.9% | 33.0%      | 26.8%   | 34.8%             | 33.0%              |
| Somewhat dissatisfied               | 8.6%                           | 4.8%   | 3.1%  | 3.8%       | 2.2%    | 3.3%              | 3.6%               |
| Not satisfied at all                | 1.7%                           | 0.0%   | 1.3%  | 0.9%       | 0.2%    | 1.0%              | 0.7%               |
| <b>Restaurants</b>                  |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 35.6%                          | 48.3%  | 41.8% | 46.9%      | 51.0%   | 46.0%             | 47.5%              |
| Somewhat satisfied                  | 57.6%                          | 43.0%  | 50.1% | 46.8%      | 44.4%   | 47.4%             | 46.0%              |
| Somewhat dissatisfied               | 5.1%                           | 8.7%   | 7.0%  | 6.1%       | 4.0%    | 6.0%              | 5.8%               |
| Not satisfied at all                | 1.7%                           | 0.0%   | 1.1%  | 0.2%       | 0.5%    | 0.5%              | 0.7%               |
| <b>Shopping</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 46.3%                          | 51.7%  | 47.5% | 50.0%      | 61.1%   | 51.8%             | 54.0%              |
| Somewhat satisfied                  | 46.3%                          | 42.1%  | 46.0% | 46.3%      | 35.7%   | 43.5%             | 41.5%              |
| Somewhat dissatisfied               | 7.4%                           | 6.2%   | 5.8%  | 3.2%       | 3.2%    | 4.2%              | 4.2%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.7%  | 0.5%       | 0.0%    | 0.5%              | 0.2%               |
| <b>Golf Courses</b>                 |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 33.3%                          | 63.6%  | 51.3% | 67.8%      | 68.8%   | 56.3%             | 70.2%              |
| Somewhat satisfied                  | 55.6%                          | 36.4%  | 40.8% | 27.6%      | 26.6%   | 38.0%             | 23.4%              |
| Somewhat dissatisfied               | 11.1%                          | 0.0%   | 6.6%  | 4.6%       | 3.1%    | 4.4%              | 5.3%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 1.3%  | 0.0%       | 1.6%    | 1.3%              | 1.1%               |
| <b>Activities &amp; Attractions</b> |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 50.0%                          | 54.5%  | 59.0% | 51.5%      | 51.1%   | 55.6%             | 50.4%              |
| Somewhat satisfied                  | 44.0%                          | 41.0%  | 37.2% | 44.5%      | 46.1%   | 40.5%             | 46.7%              |
| Somewhat dissatisfied               | 6.0%                           | 4.5%   | 3.6%  | 3.5%       | 2.6%    | 3.6%              | 2.7%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.2%  | 0.5%       | 0.2%    | 0.3%              | 0.2%               |
| <b>Transportation</b>               |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 48.7%                          | 56.3%  | 43.7% | 48.6%      | 66.4%   | 52.5%             | 54.8%              |
| Somewhat satisfied                  | 35.9%                          | 35.6%  | 38.9% | 40.3%      | 29.5%   | 37.0%             | 33.5%              |
| Somewhat dissatisfied               | 12.8%                          | 6.9%   | 11.1% | 9.1%       | 3.9%    | 7.5%              | 9.4%               |
| Not satisfied at all                | 2.6%                           | 1.1%   | 6.3%  | 2.0%       | 0.2%    | 2.9%              | 2.3%               |
| <b>Airports</b>                     |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 38.6%                          | 43.2%  | 34.3% | 41.6%      | 53.0%   | 41.2%             | 46.2%              |
| Somewhat satisfied                  | 56.1%                          | 45.3%  | 55.3% | 51.1%      | 41.6%   | 51.2%             | 45.7%              |
| Somewhat dissatisfied               | 5.3%                           | 10.1%  | 9.3%  | 6.5%       | 4.7%    | 6.7%              | 7.5%               |
| Not satisfied at all                | 0.0%                           | 1.4%   | 1.1%  | 0.8%       | 0.7%    | 0.9%              | 0.5%               |
| <b>Parks &amp; Beaches</b>          |                                |        |       |            |         |                   |                    |
| Very satisfied                      | 70.7%                          | 71.2%  | 67.7% | 68.6%      | 72.1%   | 68.9%             | 69.7%              |
| Somewhat satisfied                  | 19.0%                          | 26.7%  | 30.1% | 28.8%      | 26.0%   | 28.6%             | 27.7%              |
| Somewhat dissatisfied               | 10.3%                          | 2.1%   | 2.0%  | 2.3%       | 1.8%    | 2.4%              | 2.1%               |
| Not satisfied at all                | 0.0%                           | 0.0%   | 0.2%  | 0.3%       | 0.2%    | 0.2%              | 0.5%               |

**TABLE 3.13 Detailed Satisfaction Ratings by Category -- U.S. Total  
(% of U.S. Total Visitors)**

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 78.1%          | 19.3%              | 2.1%                  | 0.5%                 |
| Location                            | 76.8%          | 20.8%              | 1.9%                  | 0.4%                 |
| Service                             | 70.3%          | 24.6%              | 4.1%                  | 1.0%                 |
| Facility                            | 71.3%          | 23.6%              | 4.5%                  | 0.6%                 |
| Cleanliness & comfort               | 72.2%          | 22.3%              | 4.7%                  | 0.8%                 |
| Price                               | 59.4%          | 32.4%              | 6.9%                  | 1.3%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 63.4%          | 33.0%              | 3.1%                  | 0.4%                 |
| Location                            | 66.0%          | 29.4%              | 4.0%                  | 0.5%                 |
| Variety of choices                  | 64.0%          | 30.4%              | 5.0%                  | 0.5%                 |
| Service                             | 65.3%          | 30.8%              | 3.3%                  | 0.6%                 |
| Quality & taste of food             | 64.0%          | 31.3%              | 4.0%                  | 0.8%                 |
| Value for the money                 | 38.9%          | 45.4%              | 13.6%                 | 2.1%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 64.8%          | 32.2%              | 2.7%                  | 0.3%                 |
| Sufficient shopping places          | 70.7%          | 26.1%              | 2.9%                  | 0.3%                 |
| Location                            | 68.7%          | 27.2%              | 3.6%                  | 0.5%                 |
| Variety of merchandise              | 61.0%          | 32.1%              | 6.1%                  | 0.8%                 |
| Service                             | 62.8%          | 33.4%              | 3.2%                  | 0.6%                 |
| Quality of merchandise              | 57.5%          | 37.3%              | 4.7%                  | 0.4%                 |
| Price                               | 39.2%          | 47.3%              | 12.2%                 | 1.3%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 74.4%          | 24.2%              | 1.0%                  | 0.4%                 |
| Location                            | 76.1%          | 22.3%              | 1.6%                  | 0.0%                 |
| Service                             | 68.6%          | 28.9%              | 2.1%                  | 0.4%                 |
| Price                               | 40.6%          | 44.5%              | 12.6%                 | 2.3%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 69.8%          | 28.0%              | 2.0%                  | 0.2%                 |
| Excitement                          | 67.7%          | 29.3%              | 2.6%                  | 0.4%                 |
| Variety of choices                  | 70.8%          | 26.0%              | 2.9%                  | 0.2%                 |
| Service                             | 68.0%          | 29.3%              | 2.4%                  | 0.4%                 |
| Value for the money                 | 45.9%          | 43.2%              | 9.4%                  | 1.5%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 60.8%          | 31.1%              | 5.6%                  | 2.5%                 |
| Convenience                         | 61.9%          | 29.5%              | 6.2%                  | 2.4%                 |
| Cleanliness & comfort               | 59.9%          | 33.3%              | 5.3%                  | 1.5%                 |
| Efficiency                          | 59.0%          | 32.2%              | 6.1%                  | 2.7%                 |
| Price                               | 57.1%          | 32.6%              | 7.5%                  | 2.9%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 56.6%          | 37.0%              | 5.0%                  | 1.5%                 |
| Signage                             | 58.5%          | 34.3%              | 5.3%                  | 1.9%                 |
| Cleanliness & comfort               | 61.6%          | 32.2%              | 5.0%                  | 1.2%                 |
| Ease of getting around              | 56.3%          | 32.7%              | 8.5%                  | 2.5%                 |
| Availability of food                | 42.4%          | 35.9%              | 17.5%                 | 4.2%                 |
| Availability of shopping            | 46.2%          | 38.9%              | 11.9%                 | 3.0%                 |
| Friendliness of workers             | 56.8%          | 34.4%              | 6.7%                  | 2.1%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 73.0%          | 24.1%              | 2.6%                  | 0.3%                 |
| Security                            | 61.3%          | 31.8%              | 5.2%                  | 1.7%                 |
| Facility                            | 65.4%          | 29.8%              | 4.0%                  | 0.8%                 |
| Cleanliness & comfort               | 65.2%          | 28.3%              | 5.5%                  | 1.0%                 |

**TABLE 3.14 Detailed Satisfaction Ratings by Category -- U.S. West  
(% of U.S. West Visitors)**

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 76.9%          | 20.3%              | 2.5%                  | 0.3%                 |
| Location                            | 75.1%          | 22.1%              | 2.5%                  | 0.3%                 |
| Service                             | 68.5%          | 26.0%              | 4.4%                  | 1.1%                 |
| Facility                            | 69.4%          | 24.3%              | 5.6%                  | 0.7%                 |
| Cleanliness & comfort               | 71.2%          | 22.8%              | 5.0%                  | 1.0%                 |
| Price                               | 60.7%          | 30.8%              | 7.5%                  | 1.0%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 62.6%          | 33.6%              | 3.5%                  | 0.3%                 |
| Location                            | 66.0%          | 29.2%              | 4.4%                  | 0.4%                 |
| Variety of choices                  | 64.2%          | 30.0%              | 5.1%                  | 0.6%                 |
| Service                             | 64.2%          | 32.2%              | 3.3%                  | 0.3%                 |
| Quality & taste of food             | 63.1%          | 32.4%              | 3.9%                  | 0.6%                 |
| Value for the money                 | 39.2%          | 45.6%              | 12.9%                 | 2.2%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 64.5%          | 32.7%              | 2.6%                  | 0.3%                 |
| Sufficient shopping places          | 70.1%          | 26.9%              | 2.7%                  | 0.3%                 |
| Location                            | 67.9%          | 28.2%              | 3.5%                  | 0.3%                 |
| Variety of merchandise              | 59.6%          | 32.8%              | 6.8%                  | 0.7%                 |
| Service                             | 62.9%          | 33.0%              | 3.4%                  | 0.7%                 |
| Quality of merchandise              | 57.7%          | 37.1%              | 4.9%                  | 0.3%                 |
| Price                               | 38.7%          | 47.8%              | 12.2%                 | 1.3%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 68.8%          | 29.7%              | 1.1%                  | 0.4%                 |
| Location                            | 72.9%          | 25.0%              | 2.1%                  | 0.0%                 |
| Service                             | 62.7%          | 35.1%              | 1.8%                  | 0.4%                 |
| Price                               | 34.7%          | 51.1%              | 12.4%                 | 1.8%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 67.5%          | 30.5%              | 1.9%                  | 0.1%                 |
| Excitement                          | 65.5%          | 31.4%              | 3.0%                  | 0.1%                 |
| Variety of choices                  | 69.3%          | 27.6%              | 3.1%                  | 0.0%                 |
| Service                             | 66.3%          | 31.1%              | 2.5%                  | 0.1%                 |
| Value for the money                 | 44.0%          | 44.7%              | 10.0%                 | 1.3%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 57.1%          | 34.2%              | 5.1%                  | 3.6%                 |
| Convenience                         | 59.4%          | 31.9%              | 5.6%                  | 3.0%                 |
| Cleanliness & comfort               | 57.5%          | 34.2%              | 6.7%                  | 1.6%                 |
| Efficiency                          | 55.5%          | 34.9%              | 6.7%                  | 2.9%                 |
| Price                               | 53.8%          | 35.4%              | 7.4%                  | 3.4%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 56.4%          | 36.9%              | 5.3%                  | 1.4%                 |
| Signage                             | 56.8%          | 34.7%              | 6.7%                  | 1.8%                 |
| Cleanliness & comfort               | 61.8%          | 32.5%              | 4.6%                  | 1.1%                 |
| Ease of getting around              | 55.4%          | 32.4%              | 9.8%                  | 2.4%                 |
| Availability of food                | 41.3%          | 35.8%              | 18.5%                 | 4.3%                 |
| Availability of shopping            | 45.1%          | 39.1%              | 12.9%                 | 2.9%                 |
| Friendliness of workers             | 56.8%          | 33.6%              | 7.4%                  | 2.2%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 71.9%          | 25.7%              | 2.1%                  | 0.2%                 |
| Security                            | 58.6%          | 34.2%              | 5.3%                  | 1.9%                 |
| Facility                            | 64.2%          | 31.2%              | 3.7%                  | 0.9%                 |
| Cleanliness & comfort               | 63.5%          | 30.3%              | 5.3%                  | 0.9%                 |

**TABLE 3.15 Detailed Satisfaction Ratings by Category -- U.S. East**  
 (% of U.S. East Visitors)

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 79.4%          | 18.3%              | 1.6%                  | 0.7%                 |
| Location                            | 78.6%          | 19.5%              | 1.4%                  | 0.5%                 |
| Service                             | 72.2%          | 23.2%              | 3.7%                  | 0.9%                 |
| Facility                            | 73.1%          | 22.9%              | 3.4%                  | 0.6%                 |
| Cleanliness & comfort               | 73.1%          | 21.8%              | 4.5%                  | 0.6%                 |
| Price                               | 58.1%          | 34.1%              | 6.3%                  | 1.6%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 64.3%          | 32.4%              | 2.8%                  | 0.5%                 |
| Location                            | 66.0%          | 29.7%              | 3.6%                  | 0.7%                 |
| Variety of choices                  | 63.9%          | 30.9%              | 4.8%                  | 0.4%                 |
| Service                             | 66.4%          | 29.4%              | 3.4%                  | 0.8%                 |
| Quality & taste of food             | 64.9%          | 30.1%              | 4.1%                  | 0.9%                 |
| Value for the money                 | 38.6%          | 45.2%              | 14.3%                 | 2.0%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 65.1%          | 31.7%              | 2.8%                  | 0.4%                 |
| Sufficient shopping places          | 71.4%          | 25.2%              | 3.1%                  | 0.3%                 |
| Location                            | 69.4%          | 26.1%              | 3.8%                  | 0.7%                 |
| Variety of merchandise              | 62.6%          | 31.3%              | 5.3%                  | 0.8%                 |
| Service                             | 62.8%          | 33.8%              | 3.0%                  | 0.4%                 |
| Quality of merchandise              | 57.3%          | 37.6%              | 4.5%                  | 0.5%                 |
| Price                               | 39.7%          | 46.8%              | 12.2%                 | 1.3%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 81.5%          | 17.1%              | 0.9%                  | 0.5%                 |
| Location                            | 80.4%          | 18.7%              | 0.9%                  | 0.0%                 |
| Service                             | 76.2%          | 20.9%              | 2.4%                  | 0.5%                 |
| Price                               | 48.3%          | 35.9%              | 12.9%                 | 2.9%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 72.1%          | 25.6%              | 2.0%                  | 0.4%                 |
| Excitement                          | 69.9%          | 27.2%              | 2.3%                  | 0.6%                 |
| Variety of choices                  | 72.4%          | 24.5%              | 2.7%                  | 0.4%                 |
| Service                             | 69.7%          | 27.4%              | 2.3%                  | 0.6%                 |
| Value for the money                 | 47.8%          | 41.7%              | 8.8%                  | 1.7%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 64.1%          | 28.4%              | 6.0%                  | 1.5%                 |
| Convenience                         | 64.0%          | 27.4%              | 6.7%                  | 1.9%                 |
| Cleanliness & comfort               | 62.1%          | 32.5%              | 4.0%                  | 1.4%                 |
| Efficiency                          | 62.0%          | 29.9%              | 5.5%                  | 2.6%                 |
| Price                               | 59.8%          | 30.3%              | 7.5%                  | 2.4%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 56.8%          | 37.1%              | 4.6%                  | 1.5%                 |
| Signage                             | 60.3%          | 34.0%              | 3.7%                  | 2.0%                 |
| Cleanliness & comfort               | 61.4%          | 32.0%              | 5.4%                  | 1.2%                 |
| Ease of getting around              | 57.4%          | 33.0%              | 7.1%                  | 2.5%                 |
| Availability of food                | 43.6%          | 36.0%              | 16.3%                 | 4.1%                 |
| Availability of shopping            | 47.4%          | 38.6%              | 10.8%                 | 3.2%                 |
| Friendliness of workers             | 56.7%          | 35.2%              | 6.0%                  | 2.1%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 74.2%          | 22.3%              | 3.1%                  | 0.3%                 |
| Security                            | 64.2%          | 29.1%              | 5.2%                  | 1.5%                 |
| Facility                            | 66.6%          | 28.4%              | 4.3%                  | 0.7%                 |
| Cleanliness & comfort               | 67.1%          | 26.2%              | 5.7%                  | 1.0%                 |

**TABLE 3.16 Detailed Satisfaction Ratings by Category -- Japan**  
(% of Japanese Visitors)

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 40.8%          | 48.5%              | 9.7%                  | 1.0%                 |
| Location                            | 49.0%          | 49.0%              | 49.0%                 | 49.0%                |
| Service                             | 29.0%          | 50.0%              | 18.7%                 | 2.3%                 |
| Facility                            | 27.8%          | 47.3%              | 21.6%                 | 3.3%                 |
| Cleanliness & comfort               | 35.3%          | 48.2%              | 14.4%                 | 2.2%                 |
| Price                               | 33.8%          | 50.8%              | 13.4%                 | 2.0%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 22.1%          | 59.0%              | 17.3%                 | 1.5%                 |
| Location                            | 30.8%          | 54.9%              | 13.1%                 | 1.1%                 |
| Variety of choices                  | 22.7%          | 52.2%              | 23.0%                 | 2.1%                 |
| Service                             | 21.9%          | 54.9%              | 21.3%                 | 1.9%                 |
| Quality & taste of food             | 17.2%          | 48.8%              | 29.4%                 | 4.6%                 |
| Value for the money                 | 16.0%          | 47.3%              | 31.7%                 | 5.0%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 40.1%          | 50.0%              | 9.2%                  | 0.7%                 |
| Sufficient shopping places          | 51.6%          | 40.6%              | 7.0%                  | 0.8%                 |
| Location                            | 40.7%          | 48.9%              | 10.0%                 | 0.5%                 |
| Variety of merchandise              | 39.9%          | 45.6%              | 13.5%                 | 1.0%                 |
| Service                             | 27.5%          | 54.3%              | 16.9%                 | 1.3%                 |
| Quality of merchandise              | 27.4%          | 57.9%              | 13.8%                 | 0.9%                 |
| Price                               | 23.3%          | 55.5%              | 19.4%                 | 1.8%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 40.6%          | 47.0%              | 10.8%                 | 1.6%                 |
| Location                            | 50.2%          | 38.8%              | 9.8%                  | 1.2%                 |
| Service                             | 26.8%          | 47.9%              | 23.1%                 | 2.2%                 |
| Price                               | 22.4%          | 45.1%              | 25.1%                 | 7.4%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 34.7%          | 54.7%              | 10.2%                 | 0.4%                 |
| Excitement                          | 38.1%          | 51.9%              | 9.4%                  | 0.6%                 |
| Variety of choices                  | 32.7%          | 52.9%              | 13.6%                 | 0.7%                 |
| Service                             | 27.2%          | 55.8%              | 15.8%                 | 1.2%                 |
| Value for the money                 | 21.3%          | 52.7%              | 23.4%                 | 2.7%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 35.3%          | 49.4%              | 12.8%                 | 2.4%                 |
| Convenience                         | 36.7%          | 45.6%              | 14.7%                 | 3.0%                 |
| Cleanliness & comfort               | 27.7%          | 53.5%              | 17.2%                 | 1.6%                 |
| Efficiency                          | 26.8%          | 48.8%              | 20.1%                 | 4.2%                 |
| Price                               | 34.3%          | 50.3%              | 13.3%                 | 2.0%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 20.2%          | 60.1%              | 18.3%                 | 1.3%                 |
| Signage                             | 22.0%          | 58.8%              | 17.3%                 | 1.9%                 |
| Cleanliness & comfort               | 23.9%          | 55.9%              | 18.2%                 | 2.0%                 |
| Ease of getting around              | 17.7%          | 49.6%              | 28.1%                 | 4.6%                 |
| Availability of food                | 9.5%           | 42.2%              | 40.6%                 | 7.7%                 |
| Availability of shopping            | 13.0%          | 45.8%              | 35.8%                 | 5.5%                 |
| Friendliness of workers             | 18.9%          | 56.3%              | 20.4%                 | 4.4%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 48.1%          | 47.0%              | 4.6%                  | 0.3%                 |
| Security                            | 42.2%          | 49.0%              | 8.1%                  | 0.6%                 |
| Facility                            | 36.2%          | 51.5%              | 11.7%                 | 0.6%                 |
| Cleanliness & comfort               | 40.2%          | 48.2%              | 10.4%                 | 1.1%                 |

**TABLE 3.17 Detailed Satisfaction Ratings by Category -- Canada  
(% of Canadian Visitors)**

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 70.2%          | 25.8%              | 3.3%                  | 0.7%                 |
| Location                            | 75.3%          | 22.0%              | 1.7%                  | 1.1%                 |
| Service                             | 61.7%          | 32.0%              | 4.6%                  | 1.6%                 |
| Facility                            | 62.1%          | 32.5%              | 4.0%                  | 1.4%                 |
| Cleanliness & comfort               | 65.6%          | 28.1%              | 4.6%                  | 1.7%                 |
| Price                               | 53.0%          | 35.7%              | 8.3%                  | 3.0%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 53.6%          | 41.7%              | 3.6%                  | 1.1%                 |
| Location                            | 58.9%          | 34.0%              | 6.7%                  | 0.4%                 |
| Variety of choices                  | 56.8%          | 35.1%              | 7.1%                  | 0.9%                 |
| Service                             | 56.7%          | 38.8%              | 4.0%                  | 0.5%                 |
| Quality & taste of food             | 54.7%          | 38.2%              | 5.7%                  | 1.4%                 |
| Value for the money                 | 33.2%          | 43.7%              | 19.1%                 | 4.0%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 56.4%          | 38.8%              | 4.3%                  | 0.5%                 |
| Sufficient shopping places          | 62.5%          | 32.4%              | 4.4%                  | 0.7%                 |
| Location                            | 60.4%          | 33.3%              | 5.4%                  | 0.9%                 |
| Variety of merchandise              | 55.2%          | 36.0%              | 7.2%                  | 1.7%                 |
| Service                             | 56.0%          | 39.8%              | 4.0%                  | 0.2%                 |
| Quality of merchandise              | 48.5%          | 44.8%              | 5.4%                  | 1.3%                 |
| Price                               | 32.9%          | 47.9%              | 15.0%                 | 4.2%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 64.6%          | 30.4%              | 2.5%                  | 2.5%                 |
| Location                            | 70.7%          | 25.0%              | 3.7%                  | 0.6%                 |
| Service                             | 63.1%          | 31.2%              | 5.1%                  | 0.6%                 |
| Price                               | 26.7%          | 38.5%              | 25.5%                 | 9.3%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 63.2%          | 33.4%              | 2.5%                  | 0.9%                 |
| Excitement                          | 62.3%          | 33.2%              | 3.7%                  | 0.7%                 |
| Variety of choices                  | 64.2%          | 29.7%              | 5.1%                  | 1.0%                 |
| Service                             | 61.0%          | 34.2%              | 4.3%                  | 0.5%                 |
| Value for the money                 | 38.6%          | 44.4%              | 14.3%                 | 2.6%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 57.4%          | 33.1%              | 6.9%                  | 2.7%                 |
| Convenience                         | 58.7%          | 31.5%              | 6.9%                  | 2.8%                 |
| Cleanliness & comfort               | 57.3%          | 36.2%              | 4.6%                  | 1.9%                 |
| Efficiency                          | 56.4%          | 34.4%              | 6.7%                  | 2.5%                 |
| Price                               | 54.4%          | 34.6%              | 8.3%                  | 2.6%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 55.0%          | 38.3%              | 5.6%                  | 1.0%                 |
| Signage                             | 56.3%          | 35.6%              | 6.6%                  | 1.5%                 |
| Cleanliness & comfort               | 59.1%          | 34.9%              | 5.0%                  | 1.0%                 |
| Ease of getting around              | 57.8%          | 31.7%              | 8.9%                  | 1.6%                 |
| Availability of food                | 37.3%          | 37.8%              | 19.8%                 | 5.1%                 |
| Availability of shopping            | 41.1%          | 39.5%              | 16.6%                 | 2.8%                 |
| Friendliness of workers             | 57.0%          | 33.3%              | 8.1%                  | 1.6%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 73.4%          | 23.4%              | 2.5%                  | 0.7%                 |
| Security                            | 63.0%          | 29.1%              | 6.4%                  | 1.5%                 |
| Facility                            | 63.9%          | 29.0%              | 6.1%                  | 1.0%                 |
| Cleanliness & comfort               | 64.2%          | 28.6%              | 5.3%                  | 1.9%                 |



**TABLE 3.18 Detailed Satisfaction Ratings by Category -- Europe**  
(% of European Visitors)

| Category                            | Very Satisfied | Somewhat satisfied | Somewhat dissatisfied | Not satisfied at all |
|-------------------------------------|----------------|--------------------|-----------------------|----------------------|
| <b>Accommodations</b>               |                |                    |                       |                      |
| Overall                             | 62.0%          | 33.7%              | 3.4%                  | 0.9%                 |
| Location                            | 65.2%          | 30.4%              | 3.6%                  | 0.8%                 |
| Service                             | 55.7%          | 37.4%              | 5.7%                  | 1.2%                 |
| Facility                            | 53.2%          | 39.0%              | 6.6%                  | 1.3%                 |
| Cleanliness & comfort               | 59.8%          | 32.7%              | 6.2%                  | 1.4%                 |
| Price                               | 44.5%          | 39.2%              | 13.2%                 | 3.2%                 |
| <b>Restaurants</b>                  |                |                    |                       |                      |
| Overall                             | 46.7%          | 46.8%              | 5.9%                  | 0.6%                 |
| Location                            | 52.6%          | 40.2%              | 6.4%                  | 0.8%                 |
| Variety of choices                  | 50.2%          | 39.1%              | 9.3%                  | 1.4%                 |
| Service                             | 52.7%          | 41.4%              | 5.1%                  | 0.9%                 |
| Quality & taste of food             | 46.7%          | 44.3%              | 7.4%                  | 1.7%                 |
| Value for the money                 | 32.5%          | 46.0%              | 16.9%                 | 4.5%                 |
| <b>Shopping</b>                     |                |                    |                       |                      |
| Overall                             | 52.7%          | 42.8%              | 4.2%                  | 0.4%                 |
| Sufficient shopping places          | 59.8%          | 35.5%              | 4.6%                  | 0.2%                 |
| Location                            | 55.0%          | 38.7%              | 5.9%                  | 0.4%                 |
| Variety of merchandise              | 48.0%          | 40.3%              | 10.5%                 | 1.2%                 |
| Service                             | 55.0%          | 40.6%              | 3.9%                  | 0.6%                 |
| Quality of merchandise              | 44.7%          | 48.0%              | 6.6%                  | 0.7%                 |
| Price                               | 33.2%          | 47.6%              | 16.3%                 | 2.9%                 |
| <b>Golf courses</b>                 |                |                    |                       |                      |
| Overall                             | 61.7%          | 32.6%              | 4.6%                  | 1.1%                 |
| Location                            | 67.2%          | 29.3%              | 3.1%                  | 0.4%                 |
| Service                             | 57.4%          | 36.7%              | 4.7%                  | 1.2%                 |
| Price                               | 34.9%          | 36.0%              | 22.1%                 | 7.0%                 |
| <b>Activities &amp; Attractions</b> |                |                    |                       |                      |
| Overall                             | 54.0%          | 42.4%              | 3.4%                  | 0.3%                 |
| Excitement                          | 50.7%          | 43.4%              | 5.5%                  | 0.4%                 |
| Variety of choices                  | 53.4%          | 40.0%              | 5.8%                  | 0.8%                 |
| Service                             | 50.6%          | 44.0%              | 4.9%                  | 0.5%                 |
| Value for the money                 | 34.8%          | 47.8%              | 14.4%                 | 2.9%                 |
| <b>Transportation</b>               |                |                    |                       |                      |
| Overall                             | 53.2%          | 36.1%              | 8.0%                  | 2.7%                 |
| Convenience                         | 51.9%          | 38.5%              | 7.5%                  | 2.1%                 |
| Cleanliness & comfort               | 49.2%          | 42.2%              | 7.2%                  | 1.4%                 |
| Efficiency                          | 49.8%          | 38.3%              | 8.4%                  | 3.4%                 |
| Price                               | 52.6%          | 36.5%              | 8.4%                  | 2.5%                 |
| <b>Airports</b>                     |                |                    |                       |                      |
| Overall                             | 43.0%          | 49.1%              | 7.0%                  | 0.9%                 |
| Signage                             | 44.5%          | 47.5%              | 7.1%                  | 0.9%                 |
| Cleanliness & comfort               | 48.5%          | 44.5%              | 6.2%                  | 0.8%                 |
| Ease of getting around              | 44.8%          | 43.9%              | 9.6%                  | 1.8%                 |
| Availability of food                | 27.3%          | 44.2%              | 23.2%                 | 5.3%                 |
| Availability of shopping            | 28.0%          | 44.8%              | 22.5%                 | 4.7%                 |
| Friendliness of workers             | 48.8%          | 41.5%              | 7.8%                  | 1.9%                 |
| <b>Parks &amp; Beaches</b>          |                |                    |                       |                      |
| Overall                             | 69.6%          | 27.9%              | 2.2%                  | 0.3%                 |
| Security                            | 58.8%          | 36.5%              | 3.9%                  | 0.8%                 |
| Facility                            | 58.3%          | 36.8%              | 4.5%                  | 0.4%                 |
| Cleanliness & comfort               | 63.3%          | 31.1%              | 5.0%                  | 0.6%                 |

**4. EXPERIENCE AND WILLINGNESS  
TO RECOMMEND/REVISIT**

## EXPERIENCE AND WILLINGNESS TO RECOMMEND/REVISIT

### Satisfaction by Island:

When asked about the overall satisfaction by each island visited, the majority of the 2003 respondents from the U.S., Japan, Canada and Europe their experiences as either “excellent” or “above average”.

**U.S. Visitors:** All islands received “excellent” ratings from over half of the U.S. visitors surveyed. Kauai had the highest satisfaction rating from both U.S. West and U.S. East respondents at 76.5 percent and 76.2 percent, respectively. Maui received the second highest percentage of “excellent” ratings. Molokai was the lowest at close to 50 percent for respondents from both U.S. markets.

**Japanese Visitors:** The Big Island (57.3%) led the islands with the highest percentage of “excellent” ratings from Japanese respondents, followed by Oahu (55.1%) and Maui (53.7%). Kauai and Molokai received “excellent” ratings from nearly 42 percent of respondents who visited these islands.

**Canadian Visitors:** All islands received “excellent” ratings from more than 58 percent of the Canadian respondents. Canadians especially liked Kauai with 73 percent of the respondents giving this island an “excellent” rating.

**European Visitors:** Just above 70 percent of the European respondents who went to Kauai rated their visit as “excellent”. Many of the visitors to the Big Island (66%), Maui (65.6%), Lanai (60%) and/or Oahu (58.8%) also gave the highest ratings to their stay on these islands.

### Likelihood to Recommend:

The majority of the U.S. West (89.6%), U.S. East (88.3%), Canadian (84.8%), European (79.9%) and Japanese (73.1%) visitors surveyed in 2003 replied that they would “very likely” recommend the islands as a vacation place to their friends and relatives. The percentages of “very likely” to recommend Hawaii as a vacation place were higher for Canadians, Europeans, and Japanese visitors compared to 2002.

**U.S. West Visitors:** Close to 91 percent of the senior visitors surveyed indicated that they would “very likely” recommend Hawaii followed by families and middle age visitors both at 90.1 percent. More repeat visitors (90.7%) than first time visitors (86.2%) surveyed said that they would “very likely” recommend Hawaii.

**U.S. East Visitors:** Over 90 percent of families (93.0%) and young (91.4%) visitors from the U.S. East would “very likely” suggest Hawaii as a vacation destination. A higher percentage of repeat visitors were more likely to recommend Hawaii than first time visitors (89.8% vs. 86.8%, respectively).

**Japanese Visitors:** Wedding/honeymoon visitors (82.3%) had the highest percentage of “very likely” to recommend the islands, followed by middle age visitors (75.7%) and young visitors (75.3%). Nearly 77 percent of repeat visitors who responded to the survey were “very likely” to recommend the islands as a vacation place compared to 67.1 percent for first time respondents.

**Canadian Visitors:** The majority of families (86%) and senior visitors (85.9%) from Canada answered that they would “very likely” recommend Hawaii. In contrast to the U.S. visitors, a smaller share of young visitors (84.9%) from Canada would recommend Hawaii. Unique to Canadian visitors, 84.8 percent of both first time and repeat visitors answered that they would “very likely” recommend Hawaii.

**European Visitors:** About 85 percent of families, 80.4 percent of middle age visitors and 83.7 percent of repeat visitors answered that they would “very likely” recommend the islands.

### **Likelihood to Revisit Hawaii:**

An exceptional 78.6 percent of the U.S. West visitors surveyed in 2003 would “very likely” return to the islands within the next five years. Over half of the U.S. East, Japanese and Canadian visitors and 37.6 percent for European visitors answered that they “would likely” return to Hawaii. The return rate to Hawaii was the lowest among young respondents from the U.S. and Japan and among wedding/honeymoon visitors from Canada and Europe.

**U.S. West Visitors:** Middle age respondents (83.9%) from the U.S. West posted the highest “very likely to revisit” percentage followed by wedding/honeymoon visitors (79.5%) and senior visitors (78.5%). The majority of the repeat visitors (83.9%) and 60.9 percent of first time visitors would “very likely revisit” Hawaii.

Of those who gave reasons why they would not be back to Hawaii, 43.7 percent answered that they “want to go someplace new”, 36.1 percent said it was “too expensive” and 21.8 percent said Hawaii is “too commercial/overdeveloped”.

**U.S. East Visitors:** Over half of all life stage and life style groups with the exception of young (46.7%) respondents from the U.S. East answered that they would “very likely” return to the islands. Close to 67 percent of repeat visitors and 36.9 percent of first time visitors would “very likely revisit” Hawaii. Family visitors were most likely to return to the islands (58.9%).

Reasons given by those who would not return were the high costs (51.8%), long flights (45.5%) and the desire to go some place new (30%).

**Japanese Visitors:** More than half of the middle age (61.9%), families (59.6%) and seniors (58.1%), 48.9 percent of wedding/honeymoon and 46.5 percent of the young visitors from Japan indicated that they would “very likely” revisit Hawaii within the next five years. Nearly 68 percent of the repeat visitors and 32.3 percent of the first time visitors surveyed would “very likely” return.

Of those who specified why they would not revisit, 43.8 percent said the “flight was too long”, 26.3 percent felt Hawaii is “too expensive”, 18.8 wanted to “go somewhere new”, 15 percent said it is “too commercial/overdeveloped” and 12.5 percent said that it was “too crowded/congested”.

**Canadian Visitors:** Seniors (56.2%), middle age (52.9%) and families (52%) were the most likely to return to Hawaii while only 31.6 percent of the wedding/honeymoon visitors would “very likely” return. The majority of the repeat visitors (67.1%) and 33 percent of first time visitors from Canada would “very likely” come back.

The main reason why some Canadians will not revisit was that Hawaii is “too expensive” (64.4%). Canadian visitors wanted to “go somewhere new” (30.1%), “flight was too long” (27.4%), Hawaii was “too commercial/overdeveloped” (17.8%), and the islands were “too crowded/congested” (12.3%) were other reasons provided.

**European Visitors:** About 48 percent of families, 41.8 percent of the middle age, 35.3 percent of the seniors, 33.7 percent of the young and 29.5 percent of the wedding/honeymoon respondents from Europe would “very likely” come back to the islands. Close to 56.7 percent of the repeat visitors and 29.3 percent of the first time respondents would “very likely” return to Hawaii.

The primary reason given by European respondents who will not return to the islands is that the “flight is too long” (60.5%). Hawaii is “too expensive” (36.9%) and wanted to “go somewhere new” (27.4%) were other explanations given.

**TABLE 4.1 Overall Island Experience  
(% of Total Visitors by MMA)**

| <b>Criterion by Island</b> | <b>U.S. Total</b> | <b>U.S. West</b> | <b>U.S. East</b> | <b>Japan</b> | <b>Canada</b> | <b>Europe</b> |
|----------------------------|-------------------|------------------|------------------|--------------|---------------|---------------|
| <b>Oahu</b>                |                   |                  |                  |              |               |               |
| Excellent                  | 60.1%             | 58.0%            | 61.8%            | 55.1%        | 59.4%         | 58.8%         |
| Above average              | 34.2%             | 36.2%            | 32.6%            | 41.4%        | 34.6%         | 34.9%         |
| Below average              | 5.1%              | 5.1%             | 5.1%             | 3.3%         | 5.4%          | 5.5%          |
| Poor                       | 0.5%              | 0.7%             | 0.4%             | 0.2%         | 0.7%          | 0.8%          |
| <b>Maui</b>                |                   |                  |                  |              |               |               |
| Excellent                  | 73.6%             | 71.6%            | 75.3%            | 53.7%        | 66.7%         | 65.6%         |
| Above average              | 23.5%             | 25.4%            | 21.9%            | 40.6%        | 30.7%         | 30.3%         |
| Below average              | 2.8%              | 3.0%             | 2.6%             | 5.0%         | 2.6%          | 3.9%          |
| Poor                       | 0.1%              | 0.0%             | 0.2%             | 0.7%         | 0.0%          | 0.2%          |
| <b>Molokai</b>             |                   |                  |                  |              |               |               |
| Excellent                  | 53.6%             | 48.0%            | 58.1%            | 41.7%        | 59.3%         | 50.0%         |
| Above average              | 39.3%             | 40.0%            | 38.7%            | 50.0%        | 29.6%         | 41.4%         |
| Below average              | 3.6%              | 4.0%             | 3.2%             | 8.3%         | 11.1%         | 8.6%          |
| Poor                       | 3.6%              | 8.0%             | 0.0%             | 0.0%         | 0.0%          | 0.0%          |
| <b>Lanai</b>               |                   |                  |                  |              |               |               |
| Excellent                  | 61.7%             | 60.7%            | 62.3%            | 50.0%        | 58.3%         | 60.0%         |
| Above average              | 30.9%             | 25.0%            | 34.0%            | 43.8%        | 38.9%         | 36.0%         |
| Below average              | 7.4%              | 14.3%            | 3.8%             | 6.3%         | 2.8%          | 2.7%          |
| Poor                       | 0.0%              | 0.0%             | 0.0%             | 0.0%         | 0.0%          | 1.3%          |
| <b>Big Island</b>          |                   |                  |                  |              |               |               |
| Excellent                  | 65.1%             | 63.7%            | 66.2%            | 57.3%        | 61.4%         | 66.0%         |
| Above average              | 30.7%             | 32.8%            | 29.2%            | 36.3%        | 32.1%         | 30.7%         |
| Below average              | 3.6%              | 2.3%             | 4.6%             | 4.9%         | 6.1%          | 2.7%          |
| Poor                       | 0.5%              | 1.2%             | 0.0%             | 1.5%         | 0.4%          | 0.5%          |
| <b>Kauai</b>               |                   |                  |                  |              |               |               |
| Excellent                  | 76.4%             | 76.5%            | 76.2%            | 41.6%        | 73.0%         | 71.3%         |
| Above average              | 21.3%             | 21.8%            | 20.9%            | 50.5%        | 24.1%         | 25.3%         |
| Below average              | 2.3%              | 1.6%             | 2.9%             | 7.9%         | 3.0%          | 3.4%          |
| Poor                       | 0.0%              | 0.0%             | 0.0%             | 0.0%         | 0.0%          | 0.0%          |

**TABLE 4.2 Overall Rating of Most Recent Vacation to Hawaii  
(% of Total Visitors by MMA)**

| Criterion     | U.S. Total | U.S. West | U.S. East | Japan  | Canada | Europe |
|---------------|------------|-----------|-----------|--------|--------|--------|
| Excellent     | 72.4%      | 69.9%     | 74.9%     | 52.0%  | 63.8%  | 67.5%  |
| Above average | 25.9%      | 28.4%     | 23.2%     | 44.7%  | 32.9%  | 30.1%  |
| Below average | 1.7%       | 1.6%      | 1.8%      | 2.5%   | 3.0%   | 2.2%   |
| Poor          | 0.0%       | 0.0%      | 0.1%      | 0.8%   | 0.2%   | 0.2%   |
| Total         | 100.0%     | 100.0%    | 100.0%    | 100.0% | 100.0% | 100.0% |

**TABLE 4.3 Expectations of Hawaiian Vacation  
(% of Total Visitors by MMA)**

| Criterion                 | U.S. Total | U.S. West | U.S. East | Japan  | Canada | Europe |
|---------------------------|------------|-----------|-----------|--------|--------|--------|
| Exceeded expectations     | 38.6%      | 33.1%     | 44.3%     | 31.1%  | 38.3%  | 40.6%  |
| Met expectations          | 59.3%      | 64.7%     | 53.6%     | 64.2%  | 59.0%  | 55.2%  |
| Did not meet expectations | 2.1%       | 2.1%      | 2.1%      | 4.7%   | 2.7%   | 4.1%   |
| Total                     | 100.0%     | 100.0%    | 100.0%    | 100.0% | 100.0% | 100.0% |

**TABLE 4.4 Likelihood to Recommend Hawaii as a Vacation Place  
(% of Total Visitors by MMA)**

| Criterion         | U.S. Total | U.S. West | U.S. East | Japan  | Canada | Europe |
|-------------------|------------|-----------|-----------|--------|--------|--------|
| Very likely       | 89.0%      | 89.6%     | 88.3%     | 73.1%  | 84.8%  | 79.9%  |
| Somewhat likely   | 9.4%       | 9.5%      | 9.2%      | 24.1%  | 12.6%  | 16.4%  |
| Not too likely    | 1.5%       | 0.9%      | 2.2%      | 2.3%   | 2.1%   | 3.3%   |
| Not at all likely | 0.2%       | 0.0%      | 0.3%      | 0.5%   | 0.5%   | 0.3%   |
| Total             | 100.0%     | 100.0%    | 100.0%    | 100.0% | 100.0% | 100.0% |

**TABLE 4.5 Likelihood to Recommend Hawaii by Lifestage -- U.S. Total  
(% of Visitors by Lifestyle / Lifestage Segment)**

| Lifestage                      | Very Likely | Somewhat Likely | Not Too Likely | Not At All Likely |
|--------------------------------|-------------|-----------------|----------------|-------------------|
| All visitors                   | 89.0%       | 9.4%            | 1.5%           | 0.2%              |
| Lifestyle / Lifestage segments |             |                 |                |                   |
| Wedding / honeymoon            | 83.3%       | 12.5%           | 4.2%           | 0.0%              |
| Family                         | 91.2%       | 8.1%            | 0.7%           | 0.0%              |
| Young                          | 89.6%       | 9.7%            | 0.8%           | 0.0%              |
| Middle age                     | 88.6%       | 9.4%            | 1.8%           | 0.1%              |
| Seniors                        | 88.5%       | 9.3%            | 1.7%           | 0.4%              |
| Visitation status              |             |                 |                |                   |
| First timers                   | 86.6%       | 10.9%           | 2.2%           | 0.3%              |
| Repeat visitors                | 90.4%       | 8.5%            | 1.0%           | 0.1%              |

**TABLE 4.6 Likelihood to Recommend Hawaii by Lifestage -- U.S. West  
(% of Visitors by Lifestyle / Lifestage Segment)**

| Lifestage                      | Very Likely | Somewhat Likely | Not Too Likely | Not At All Likely |
|--------------------------------|-------------|-----------------|----------------|-------------------|
| All visitors                   | 89.6%       | 9.5%            | 0.9%           | 0.0%              |
| Lifestyle / Lifestage segments |             |                 |                |                   |
| Wedding / honeymoon            | 84.6%       | 12.8%           | 2.6%           | 0.0%              |
| Family                         | 90.1%       | 9.9%            | 0.0%           | 0.0%              |
| Young                          | 87.4%       | 12.6%           | 0.0%           | 0.0%              |
| Middle age                     | 90.1%       | 8.3%            | 1.6%           | 0.0%              |
| Seniors                        | 90.6%       | 8.5%            | 0.9%           | 0.0%              |
| Visitation status              |             |                 |                |                   |
| First timers                   | 86.2%       | 11.8%           | 2.0%           | 0.0%              |
| Repeat visitors                | 90.7%       | 8.8%            | 0.5%           | 0.0%              |

**TABLE 4.7 Likelihood to Recommend Hawaii by Lifestage -- U.S. East  
(% of Visitors by Lifestyle / Lifestage Segment)**

| Lifestage                      | Very Likely | Somewhat Likely | Not Too Likely | Not At All Likely |
|--------------------------------|-------------|-----------------|----------------|-------------------|
| All visitors                   | 88.3%       | 9.2%            | 2.2%           | 0.3%              |
| Lifestyle / Lifestage segments |             |                 |                |                   |
| Wedding / honeymoon            | 81.8%       | 12.1%           | 6.1%           | 0.0%              |
| Family                         | 93.0%       | 5.1%            | 1.9%           | 0.0%              |
| Young                          | 91.4%       | 7.2%            | 1.4%           | 0.0%              |
| Middle age                     | 87.0%       | 10.6%           | 2.1%           | 0.2%              |
| Seniors                        | 86.6%       | 10.1%           | 2.5%           | 0.8%              |
| Visitation status              |             |                 |                |                   |
| First timers                   | 86.8%       | 10.4%           | 2.3%           | 0.5%              |
| Repeat visitors                | 89.8%       | 8.2%            | 1.8%           | 0.1%              |



**TABLE 4.8 Likelihood to Recommend Hawaii by Lifestage -- Japan**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 73.1%              | 24.1%                  | 2.3%                  | 0.5%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 82.3%              | 16.2%                  | 1.5%                  | 0.0%                     |
| Family                         | 74.8%              | 22.2%                  | 2.4%                  | 0.5%                     |
| Young                          | 75.3%              | 21.6%                  | 2.5%                  | 0.6%                     |
| Middle age                     | 75.7%              | 22.2%                  | 1.7%                  | 0.4%                     |
| Seniors                        | 63.8%              | 33.0%                  | 2.8%                  | 0.5%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 67.1%              | 28.8%                  | 3.1%                  | 1.0%                     |
| Repeat visitors                | 76.6%              | 21.3%                  | 1.8%                  | 0.2%                     |

**TABLE 4.9 Likelihood to Recommend Hawaii by Lifestage -- Canada**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 84.8%              | 12.6%                  | 2.1%                  | 0.5%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 84.2%              | 15.8%                  | 0.0%                  | 0.0%                     |
| Family                         | 86.0%              | 11.0%                  | 1.0%                  | 2.0%                     |
| Young                          | 84.9%              | 12.0%                  | 2.1%                  | 1.0%                     |
| Middle age                     | 81.9%              | 14.9%                  | 2.9%                  | 0.4%                     |
| Seniors                        | 85.9%              | 11.7%                  | 2.3%                  | 0.0%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 84.8%              | 11.6%                  | 2.5%                  | 1.0%                     |
| Repeat visitors                | 84.8%              | 13.0%                  | 2.0%                  | 0.2%                     |

**TABLE 4.10 Likelihood to Recommend Hawaii by Lifestage -- Europe**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 79.9%              | 16.5%                  | 3.3%                  | 0.3%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 73.8%              | 18.0%                  | 4.9%                  | 3.3%                     |
| Family                         | 84.7%              | 14.6%                  | 0.6%                  | 0.0%                     |
| Young                          | 79.4%              | 16.5%                  | 3.9%                  | 0.2%                     |
| Middle age                     | 80.4%              | 15.7%                  | 3.7%                  | 0.1%                     |
| Seniors                        | 79.2%              | 17.6%                  | 2.7%                  | 0.5%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 78.1%              | 17.8%                  | 3.7%                  | 0.4%                     |
| Repeat visitors                | 83.7%              | 13.9%                  | 2.4%                  | 0.0%                     |

**TABLE 4.11 Likelihood to Revisit Hawaii in the Next 5 Years  
(% of Total Visitors by MMA)**

| Criterion         | U.S. Total | U.S. West | U.S. East | Japan  | Canada | Europe |
|-------------------|------------|-----------|-----------|--------|--------|--------|
| Very likely       | 66.6%      | 78.6%     | 53.9%     | 56.4%  | 52.0%  | 37.6%  |
| Somewhat likely   | 20.7%      | 15.4%     | 26.4%     | 31.3%  | 26.0%  | 29.4%  |
| Not too likely    | 10.7%      | 5.1%      | 16.4%     | 10.7%  | 18.0%  | 26.3%  |
| Not at all likely | 2.0%       | 0.9%      | 3.3%      | 1.5%   | 4.0%   | 6.7%   |
| Total             | 100.0%     | 100.0%    | 100.0%    | 100.0% | 100.0% | 100.0% |

**TABLE 4.12 Reasons for Not Revisiting Hawaii  
(% of Visitors who are not too likely or not at all  
likely to revisit Hawaii in the next 5 years)**

| Criterion                      | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|--------------------------------|------------|-----------|-----------|-------|--------|--------|
| Too expensive                  | 43.7%      | 36.1%     | 51.8%     | 26.3% | 64.4%  | 36.9%  |
| Want to go someplace new       | 37.1%      | 43.7%     | 30.0%     | 18.8% | 30.1%  | 27.4%  |
| Flight too long                | 26.6%      | 9.2%      | 45.5%     | 43.8% | 27.4%  | 60.5%  |
| Too commercial / overdeveloped | 14.8%      | 21.8%     | 7.3%      | 15.0% | 17.8%  | 7.0%   |
| Too crowded / congested        | 15.3%      | 19.3%     | 10.9%     | 12.5% | 12.3%  | 5.1%   |
| Other                          | 10.9%      | 14.3%     | 7.3%      | 16.3% | 6.8%   | 8.9%   |

Note: Percentages do not sum to 100 percent due to multiple reasons selected.

**TABLE 4.13 Likelihood to Revisit Hawaii in the Next 5 Years - Total U.S.**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 66.6%              | 20.7%                  | 10.7%                 | 2.0%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 66.7%              | 20.8%                  | 11.1%                 | 1.4%                     |
| Family                         | 69.8%              | 18.3%                  | 10.2%                 | 1.7%                     |
| Young                          | 57.7%              | 27.2%                  | 14.0%                 | 1.2%                     |
| Middle age                     | 70.9%              | 18.9%                  | 8.7%                  | 1.5%                     |
| Seniors                        | 65.9%              | 20.4%                  | 10.3%                 | 3.4%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 45.3%              | 33.2%                  | 17.9%                 | 3.7%                     |
| Repeat visitors                | 77.0%              | 14.7%                  | 7.0%                  | 1.2%                     |

**TABLE 4.14 Likelihood to Revisit Hawaii in the Next 5 Years -- U.S. West**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 78.6%              | 15.4%                  | 5.1%                  | 0.9%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 79.5%              | 10.3%                  | 7.7%                  | 2.6%                     |
| Family                         | 76.4%              | 15.2%                  | 7.6%                  | 0.8%                     |
| Young                          | 70.3%              | 20.1%                  | 8.8%                  | 0.8%                     |
| Middle age                     | 83.9%              | 11.9%                  | 3.6%                  | 0.7%                     |
| Seniors                        | 78.5%              | 18.2%                  | 2.7%                  | 0.6%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 60.9%              | 27.3%                  | 9.9%                  | 2.0%                     |
| Repeat visitors                | 83.9%              | 11.9%                  | 3.7%                  | 0.6%                     |

**TABLE 4.15 Likelihood to Revisit Hawaii in the Next 5 Years -- U.S. East**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 53.9%              | 26.4%                  | 16.4%                 | 3.3%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 51.5%              | 33.3%                  | 15.2%                 | 0.0%                     |
| Family                         | 58.9%              | 23.4%                  | 14.6%                 | 3.2%                     |
| Young                          | 46.7%              | 33.3%                  | 18.5%                 | 1.4%                     |
| Middle age                     | 57.2%              | 26.2%                  | 14.2%                 | 2.4%                     |
| Seniors                        | 54.5%              | 22.3%                  | 17.2%                 | 6.0%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 36.9%              | 36.3%                  | 22.2%                 | 4.6%                     |
| Repeat visitors                | 67.1%              | 18.8%                  | 12.0%                 | 2.1%                     |

**TABLE 4.16 Likelihood to Revisit Hawaii in the Next 5 Years -- Japan**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 56.4%              | 31.3%                  | 10.7%                 | 1.5%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 48.9%              | 35.1%                  | 13.0%                 | 3.1%                     |
| Family                         | 59.6%              | 29.8%                  | 9.6%                  | 1.0%                     |
| Young                          | 46.5%              | 37.5%                  | 14.1%                 | 1.9%                     |
| Middle age                     | 61.9%              | 27.4%                  | 9.6%                  | 1.1%                     |
| Seniors                        | 58.1%              | 30.5%                  | 9.6%                  | 1.8%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 32.3%              | 45.7%                  | 18.6%                 | 3.4%                     |
| Repeat visitors                | 68.2%              | 24.8%                  | 6.4%                  | 0.6%                     |

**TABLE 4.17 Likelihood to Revisit Hawaii in the Next 5 Years -- Canada**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 52.0%              | 26.0%                  | 18.0%                 | 4.0%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 31.6%              | 44.7%                  | 21.1%                 | 2.6%                     |
| Family                         | 52.0%              | 27.0%                  | 14.0%                 | 7.0%                     |
| Young                          | 49.2%              | 27.7%                  | 19.4%                 | 3.7%                     |
| Middle age                     | 52.9%              | 23.7%                  | 20.5%                 | 2.9%                     |
| Seniors                        | 56.2%              | 22.9%                  | 16.2%                 | 4.7%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 33.0%              | 31.2%                  | 28.9%                 | 6.9%                     |
| Repeat visitors                | 67.1%              | 21.4%                  | 10.0%                 | 1.6%                     |

**TABLE 4.18 Likelihood to Revisit Hawaii in the Next 5 Years -- Europe**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| <b>Lifestage</b>               | <b>Very Likely</b> | <b>Somewhat Likely</b> | <b>Not Too Likely</b> | <b>Not At All Likely</b> |
|--------------------------------|--------------------|------------------------|-----------------------|--------------------------|
| All visitors                   | 37.6%              | 29.4%                  | 26.3%                 | 6.7%                     |
| Lifestyle / Lifestage segments |                    |                        |                       |                          |
| Wedding / honeymoon            | 29.5%              | 29.5%                  | 27.9%                 | 13.1%                    |
| Family                         | 48.1%              | 27.8%                  | 20.3%                 | 3.8%                     |
| Young                          | 33.7%              | 30.4%                  | 30.9%                 | 5.0%                     |
| Middle age                     | 41.8%              | 28.4%                  | 23.0%                 | 6.9%                     |
| Seniors                        | 35.3%              | 29.9%                  | 27.1%                 | 7.8%                     |
| Visitation status              |                    |                        |                       |                          |
| First timers                   | 29.3%              | 31.6%                  | 31.0%                 | 8.0%                     |
| Repeat visitors                | 56.7%              | 24.8%                  | 15.0%                 | 3.5%                     |

## 5. ACTIVITY PARTICIPATION



## ACTIVITY PARTICIPATION

### Shopping:

Shopping was the most popular activity among all visitors surveyed. Virtually all of the respondents from Japan (98.5%), Europe (97.1%), Canada (96.6%), the U.S. West (94.9%) and the U.S. East (94.7%) engaged in shopping during their stay in the islands.

### U.S. Visitors:

- The four most popular shopping places for U.S. West and U.S. East visitors were supermarkets, convenience stores, hotel stores and department stores. Nearly 50 to 65 percent of U.S. West and U.S. East visitors shopped in these four places during their stay in the islands. Supermarket shopping by U.S. West and U.S. East visitors was higher on the Neighbor Islands than on Oahu. Generally shopping activities by U.S. West, U.S. East visitors were more distributed across Oahu, Maui, Kauai and the Big Island.
- More than 97 percent of the young, family, and wedding/honeymoon visitors from the U.S. West participated in shopping activities. More young visitors from this market shopped in convenience stores than other places. A higher percentage of U.S. West families shopped in supermarkets while more wedding/honeymoon visitors shopped in department stores and convenience stores.
- Overall, more U.S. East families participated in shopping compared to other visitors from this market. Convenience stores and hotel stores were more popular with wedding/honeymoon U.S. East respondents, while families shopped more in convenience stores and supermarkets.

### Japanese Visitors:

- In contrast to their U.S. Canadians and European counterparts, most Japanese visitors favored shopping in duty free stores (82.4%), convenience stores (79.3%), designer boutiques (63.6%) and supermarket (58.4%). The majority of the Japanese respondents concentrated their shopping on Oahu.
- The most active shoppers among the Japanese respondents were wedding/honeymoon (99.2%), families (98.8%) and young visitors (98.8%). A higher percentage of wedding/honeymoon visitors shopped in duty free stores and designer boutiques compared to other Japanese visitors surveyed. More young Japanese visitors shopped in convenience stores and department stores while more families shopped in discount/outlet stores.

#### Canadian Visitors:

- More Canadian visitors shopped in supermarkets, convenience stores and department stores compared to other shopping venues. Similar to U.S. visitors shopping activities by Canadian visitors were more distributed across Oahu, Maui, Kauai and the Big Island.
- More Canadian wedding/honeymoon visitors shopped in supermarkets, convenience stores and department stores while a higher percentage of young visitors shopped in discount stores and swap meets.

#### European Visitors:

- More European visitors went to department stores and supermarkets. Shopping activities by European visitors were also more distributed across Oahu, Maui, Kauai and the Big Island compared to Japanese visitors.
- More European families surveyed shopped in department stores and discount/outlet stores.

#### **Sightseeing:**

Nearly all of the U.S. West (90.5%), U.S. East (93.4%), Japanese (94.0%), Canadian (94.0%) and European (95.8%) visitors surveyed in 2003 went sightseeing while in Hawaii. The three most popular sightseeing activities among these visitors were self-guided tours, tour bus excursions and boat tours/submarine/whale watching tours.

#### U.S. Visitors:

- The majority of the U.S. West (83.4%) and U.S. East (80.7%) visitors went on self-guided tours, which were popular across all life stages and age groups and similarly distributed across Oahu, Kauai, Maui and the Big Island.
- After self-guided tours, the second most popular sightseeing activities for U.S. West and U.S. East visitors across all life stages and age group were boat tours/submarine/whale watching tours. More U.S. West and U.S. East went on boat tours/submarine/whale watching tours on Maui and Kauai.
- A higher percentage of U.S. West and U.S. East respondents who visited Oahu went on tour bus excursions compared to those who visited the neighbor islands.

### Japanese Visitors:

- In contrast to other visitors surveyed, over 60 percent of the Japanese respondents went on self-guided tours but mainly on Oahu. Self-guided tours were similarly popular with wedding/honeymoon, families, young and middle age Japanese visitors surveyed.
- Tour bus excursions were the second most popular sightseeing activities among Japanese respondents. A higher percentage of senior visitors went on tour bus excursions compared to Japanese visitors in other life stage and age groups. Tour bus excursions were more popular among Japanese visitors on the neighbor islands compared to those who went to Oahu.
- More Japanese respondents went on boat tours/submarine/whale watching tours while on Oahu than on the neighbor island. More Japanese wedding/honeymoon visitors participated in this activity than other Japanese visitor groups.
- More Japanese visitors went on private limousine/van tours compared to their U.S. counterparts. A higher percentage of Japanese wedding/honeymoon visitors took private limousine/van tours compared to all visitors from U.S, Canada and Europe.

### Canadian Visitors:

- Similar to U.S. respondents a large number of Canadian (79.9%) visitors went on self-guided tours.
- Ranked second in popularity among Canadian seniors were tour bus excursions, while boat tours/submarine/whale watching were second most popular with weddings/honeymoon, families, young, and middle age visitors.

### European Visitors:

- Nearly 72 percent of European visitors also went on self-guided tours.
- Tour bus excursions was the second most popular sightseeing activity with European seniors and middle age visitors, while wedding/honeymoon, families, and young visitors from this market preferred boat tours/submarine/whale watching tours.

### **Recreation:**

Most of the visitors surveyed from the U.S. West (91.8%), U.S. East (89.8%), Japan (85%), Canada (92.3%) and Europe (91.1%) participated in some type of recreational activity while in the islands.



Swimming/sunbathing/beach was the most popular recreation activity among visitors from the five major markets. Families, young and wedding/honeymoon visitors from all markets showed the highest participation rate in this activity. Snorkeling/scuba diving and running/jogging/fitness walking were the second and third most popular among visitors from all markets.

#### U.S. Visitors:

- Most of the U.S. West and U.S. East respondents went swimming/sunbathing/beach on each of the islands they visited.
- Participation in snorkeling/scuba diving activities by visitors from the U.S. West and U.S. East markets was generally higher on the neighbor islands than on Oahu.
- More U.S. West and U.S. East visitors included running/jogging/fitness-walking and backpacking/hiking/camping in their vacation than the Japanese respondents.
- A higher percentage of younger U.S. West respondents went backpacking/hiking/camping while more families went snorkeling/scuba diving, surfing/body boarding and golfing.
- U.S. East families were the most active participants in all water activities as well as running/jogging/fitness walking and going to the gym/health spa compared to the rest of the visitors from this market.
- More U.S. West, U.S. East and Canadian visitors surveyed went golfing in the islands compared to their Japanese and European counterparts.

#### Japanese Visitors:

- In contrast to visitors from the other markets, fewer Japanese participated in swimming/sunbathing/beach and Japanese respondents did much of this activity on Oahu.
- Only 17.9 percent of the Japanese respondents went snorkeling/scuba diving, mainly on Oahu.
- More Japanese visitors went running/jogging/fitness walking on Oahu than the Big Island, Maui, and Kauai.
- Golf and running/jogging/fitness walking were more popular with senior and middle age Japanese visitors while a higher percentage of young visitors went snorkeling/scuba diving, surfing/body boarding, jet skiing/parasailing/windsurfing. A higher percentage of wedding/honeymoon visitors participated in swimming/sunbathing/beach and going to the gym/health spa compared to other Japanese respondents.

### Canadian Visitors:

- Similar to U.S. visitors, Canadian respondents went swimming/sunbathing/beach on each of the islands they visited.
- More families from Canada went surfing/body boarding, jet skiing/parasailing/windsurfing and golfing compared to other Canadian respondents. Younger visitors participated more in swimming/sunbathing/beach, snorkeling/scuba diving, back packing/hiking/camping and running/jogging/fitness walking.

### European Visitors:

- European respondents also went swimming/sunbathing/beach on each of the islands they visited.
- A higher percentage of younger European visitors went back packing/hiking/camping and running/jogging/fitness walking while more families participated in water activities and golf.

### **Cultural:**

More U.S. West (78.0%), U.S. East (84.3%), Canadian (79.0%) and European (83.5%) respondents participated in or attended cultural activities compared to their Japanese (56.5%) counterparts on a statewide basis.

The most popular cultural activity among the U.S. West (60.0%), U.S. East (65.5%), Canadian (61.9%), European (68.9%) and Japanese (28.7%) respondents was to visit historical sites in the islands. Attending Polynesian shows/luaus, was the second most popular activity among these respondents, followed by visiting museums/art galleries, art/craft fairs and cultural festivals.

Survey results also indicated that U.S., Canadian and European respondents generally visited one or more cultural attractions across all islands. In contrast, the majority of the Japanese respondents who participated in cultural activities did so mainly on Oahu.

### U.S. Visitors:

- Historic sites were visited by a higher percentage of young and senior U.S. West respondents while Polynesian shows/luaus attracted more families. More seniors also went to museums/art galleries and art/craft fairs.
- More U.S. East families and young visitors surveyed visited historic sites than any other visitors from this market. A higher percentage of seniors went to museums/art galleries while more young U.S. East visitors attended Polynesian shows/luaus.

#### Japanese Visitors:

- A higher percentage of Japanese seniors visited historic sites, museums/art galleries, art/craft fairs and attended Polynesian shows/luau while more young visitors went to festivals than any other Japanese visitors surveyed.

#### Canadian Visitors:

- More Canadian families attended Polynesian shows/luau and visited historic sites. A higher percentage of seniors went to art/craft fairs while more middle age visitors went to museums/art galleries.

#### European Visitors:

- Hawaii's historical sites attracted more young, families and middle age visitors while Polynesian show/luau attracted more wedding/honeymoon visitors than other European respondents.

### **Entertainment:**

The majority of the U.S. West (83.2%), U.S. East (85.1%), Japanese (89.6%), Canadian (81.9%) and European (81.5%) visitors surveyed in 2003 engaged in some form of entertainment activity during their stay. Fine dining was the most popular activity followed by lunch/sunset/dinner evening cruise, lounge acts/stage shows and nightclub/dancing/bar/karaoke. Japanese visitors participated in these activities mainly on Oahu while participation by U.S., Canadian and European respondents were more distributed throughout all islands.

#### U.S. Visitors:

- A higher percentage of younger visitors from the U.S. West sailed on lunch/sunset/dinner/evening cruises and went to nightclubs/dancing/bars/karaoke, more middle age respondents went to fine dining restaurants while more families saw lounge acts/stage shows.
- Younger U.S. East visitors went to more fine dining restaurants, nightclubs/dancing/bars/karaoke and lounge acts/stage shows than any U.S. East visitors surveyed while more wedding/honeymoon visitors sailed on lunch/sunset/dinner and evening cruises.

#### Japanese Visitors:

- A higher percentage of wedding/honeymoon visitors went on lunch/sunset/dinner/evening cruises and went to fine dining restaurants than any other Japanese visitors surveyed. More senior respondents saw lounge acts/stage shows while more middle age visitors went to nightclubs/dancing/bars/karaoke.

#### Canadian Visitors:

- Wedding/Honeymoon visitors from Canada showed greater participation in all kinds of entertainment activities compare to other Canadian groups surveyed.

#### European Visitors:

- More younger European respondents went to nightclubs/dancing/bars/karaoke and to fine dining restaurants while a higher percentage of European wedding/honeymoon visitors sailed on lunch/sunset/dinner/evening cruises.

### **Transportation:**

The majority of the visitors (89.4% U.S. West, 88.6% U.S. East, 94.3% Japanese, 91.5% Canadian, and 92.3% European) surveyed in 2003 indicated that they used some form of transportation during their stay. However, the mode of transportation differed especially between U.S. and Japanese visitors and by island.

On a Statewide basis, a rental car was the top choice among U.S. West (79.8%), U.S. East (74.8%), Canadian (69.7%) and European (54.8%) visitors. The popularity of rental cars was even greater among these visitors on the Neighbor Islands and was consistent with their participation in self-guided tours. The second and third most popular means of transportation for U.S. visitors were taxis/limousines and public buses.

In contrast, the majority of the Japanese respondents toured the islands by trolleys (60.4%), followed by taxis or limousines (47.0%), public buses (30.7%) and rental cars (21.1%). More Japanese visitors used rental cars while on Maui than on any of the other islands.

#### U.S. Visitors:

- Wedding/honeymoon visitors from the U.S. West reported higher usage of taxi/limousine and public buses than other U.S. West respondents, while trolleys and rental cars were more popular with middle age visitors. A higher percentage of U.S. East families rented cars and used taxis/limousines, more wedding/honeymoon visitors used trolleys while buses were more utilized by senior U.S. East visitors.

#### Japanese Visitors:

- Trolleys (75.6%) and taxis/limousines (60.3%) were the most popular choices among Japanese wedding/honeymoon visitors. More families and middle age respondents rented cars while more senior Japanese visitors surveyed used public buses.

Canadian Visitors:

- Rental cars were more popular among Canadian wedding/honeymoon visitors than other Canadians surveyed. Taxis/limousines were more utilized by young Canadian respondents while public busses were more utilized by senior respondents.

European Visitors:

- Similar to Canadian respondents; wedding/honeymoon visitors from Europe also used rental cars more than other European visitor groups while more seniors rode trolleys and public buses.

**TABLE 5.1 Activity Participation by Island -- U.S. Total**  
(% of U.S. Total Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>91.9%</b> | <b>87.4%</b> | <b>94.9%</b> | <b>92.8%</b> | <b>93.3%</b> |
| Helicopter / airplane tour               | 14.2%        | 2.0%         | 26.3%        | 9.4%         | 14.3%        |
| Boat tour / submarine / whale watching   | 30.9%        | 14.2%        | 25.6%        | 36.4%        | 14.0%        |
| Tour bus excursion                       | 18.4%        | 21.7%        | 12.2%        | 11.4%        | 16.9%        |
| Private limousine / van tour             | 6.3%         | 4.8%         | 2.9%         | 4.9%         | 5.4%         |
| Self-guided                              | 82.0%        | 73.5%        | 75.9%        | 76.0%        | 72.5%        |
| <b>Recreation</b>                        | <b>90.8%</b> | <b>81.2%</b> | <b>80.0%</b> | <b>86.2%</b> | <b>68.4%</b> |
| Swimming / sunbathing / beach            | 83.7%        | 73.0%        | 71.9%        | 77.9%        | 58.4%        |
| Surfing/bodyboarding                     | 23.8%        | 19.0%        | 18.4%        | 21.8%        | 9.0%         |
| Snorkeling / scuba diving                | 48.9%        | 29.0%        | 42.2%        | 53.1%        | 37.7%        |
| Jet skiing / parasailing / windsurfing   | 5.5%         | 3.7%         | 0.8%         | 7.1%         | 1.7%         |
| Golf                                     | 14.2%        | 6.2%         | 14.8%        | 14.8%        | 11.7%        |
| Running / jogging / fitness walking      | 39.5%        | 33.4%        | 32.1%        | 36.7%        | 24.9%        |
| Gym / health spa                         | 17.1%        | 11.5%        | 13.8%        | 17.1%        | 11.2%        |
| Backpacking / hiking / camping           | 23.9%        | 15.1%        | 29.8%        | 16.7%        | 22.3%        |
| Sports event or tournament               | 4.8%         | 5.4%         | 1.0%         | 1.6%         | 2.6%         |
| <b>Entertainment</b>                     | <b>84.1%</b> | <b>77.1%</b> | <b>72.1%</b> | <b>79.9%</b> | <b>61.3%</b> |
| Lunch / sunset / dinner / evening cruise | 37.4%        | 30.3%        | 30.6%        | 35.9%        | 24.2%        |
| Lounge act / stage show                  | 32.3%        | 27.0%        | 17.8%        | 29.8%        | 14.7%        |
| Nightclub / dancing / bar / karaoke      | 21.4%        | 21.7%        | 11.7%        | 15.8%        | 11.4%        |
| Fine dining                              | 68.4%        | 58.5%        | 59.5%        | 66.0%        | 46.3%        |
| <b>Shopping</b>                          | <b>94.8%</b> | <b>90.9%</b> | <b>84.3%</b> | <b>89.2%</b> | <b>78.8%</b> |
| Department stores                        | 53.0%        | 54.6%        | 29.7%        | 37.6%        | 30.2%        |
| Designer boutiques                       | 44.7%        | 33.2%        | 36.7%        | 44.7%        | 25.2%        |
| Hotel stores                             | 54.4%        | 50.9%        | 32.4%        | 45.2%        | 33.5%        |
| Swap meet / flea markets                 | 36.0%        | 36.8%        | 20.8%        | 16.7%        | 20.0%        |
| Discount / outlet stores                 | 42.1%        | 28.2%        | 38.9%        | 34.6%        | 36.6%        |
| Supermarkets                             | 59.7%        | 37.0%        | 56.0%        | 59.4%        | 43.9%        |
| Convenience stores                       | 63.3%        | 59.6%        | 48.6%        | 54.1%        | 44.6%        |
| Duty free store                          | 9.5%         | 10.3%        | 4.0%         | 6.2%         | 5.5%         |
| <b>Culture</b>                           | <b>81.1%</b> | <b>77.4%</b> | <b>64.4%</b> | <b>73.9%</b> | <b>67.9%</b> |
| Historic site                            | 62.6%        | 61.8%        | 50.2%        | 44.0%        | 59.8%        |
| Museum / art gallery                     | 33.6%        | 26.6%        | 24.3%        | 29.4%        | 23.1%        |
| Polynesian show / luau                   | 47.5%        | 39.2%        | 25.6%        | 42.4%        | 21.1%        |
| Art / craft fair                         | 22.9%        | 13.7%        | 23.5%        | 20.7%        | 12.8%        |
| Festival                                 | 6.2%         | 5.4%         | 3.0%         | 4.4%         | 3.1%         |
| <b>Transportation</b>                    | <b>89.0%</b> | <b>84.0%</b> | <b>81.4%</b> | <b>84.6%</b> | <b>75.3%</b> |
| Trolley                                  | 8.9%         | 11.8%        | 0.8%         | 2.7%         | 2.2%         |
| Public Bus                               | 15.8%        | 22.1%        | 1.3%         | 3.3%         | 2.9%         |
| Taxi / limousine                         | 19.4%        | 25.8%        | 4.4%         | 8.4%         | 6.7%         |
| Rental car                               | 77.3%        | 57.4%        | 78.7%        | 80.3%        | 69.3%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated in by visitors.

**TABLE 5.2 Activity Participation by Island -- U.S. West**  
(% of U.S. West Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>90.5%</b> | <b>86.3%</b> | <b>95.7%</b> | <b>92.2%</b> | <b>92.4%</b> |
| Helicopter / airplane tour               | 11.3%        | 1.9%         | 20.1%        | 8.6%         | 12.4%        |
| Boat tour / submarine / whale watching   | 26.5%        | 12.6%        | 26.4%        | 34.8%        | 13.6%        |
| Tour bus excursion                       | 11.5%        | 14.6%        | 6.0%         | 6.0%         | 6.8%         |
| Private limousine / van tour             | 4.7%         | 3.3%         | 2.0%         | 4.3%         | 3.6%         |
| Self-guided                              | 83.4%        | 76.5%        | 84.9%        | 82.1%        | 83.2%        |
| <b>Recreation</b>                        | <b>91.8%</b> | <b>83.9%</b> | <b>90.3%</b> | <b>90.3%</b> | <b>74.0%</b> |
| Swimming / sunbathing / beach            | 83.4%        | 74.0%        | 81.9%        | 81.7%        | 64.8%        |
| Surfing/bodyboarding                     | 27.6%        | 23.8%        | 23.1%        | 28.6%        | 13.2%        |
| Snorkeling / scuba diving                | 52.5%        | 33.6%        | 51.5%        | 61.9%        | 13.2%        |
| Jet skiing / parasailing / windsurfing   | 6.0%         | 4.9%         | 0.7%         | 8.6%         | 1.6%         |
| Golf                                     | 14.4%        | 7.8%         | 16.4%        | 13.8%        | 13.6%        |
| Running / jogging / fitness walking      | 41.4%        | 35.0%        | 39.5%        | 40.3%        | 29.2%        |
| Gym / health spa                         | 17.5%        | 13.6%        | 17.4%        | 18.7%        | 9.6%         |
| Backpacking / hiking / camping           | 23.2%        | 14.4%        | 33.1%        | 18.5%        | 24.4%        |
| Sports event or tournament               | 5.0%         | 6.8%         | 0.7%         | 1.6%         | 3.2%         |
| <b>Entertainment</b>                     | <b>83.2%</b> | <b>76.9%</b> | <b>77.9%</b> | <b>82.7%</b> | <b>66.8%</b> |
| Lunch / sunset / dinner / evening cruise | 34.6%        | 29.2%        | 31.8%        | 34.2%        | 22.4%        |
| Lounge act / stage show                  | 30.4%        | 26.1%        | 19.1%        | 32.7%        | 15.2%        |
| Nightclub / dancing / bar / karaoke      | 20.6%        | 22.2%        | 13.7%        | 15.6%        | 14.8%        |
| Fine dining                              | 67.8%        | 58.5%        | 67.6%        | 68.7%        | 50.4%        |
| <b>Shopping</b>                          | <b>94.9%</b> | <b>92.8%</b> | <b>87.3%</b> | <b>91.2%</b> | <b>87.2%</b> |
| Department stores                        | 52.3%        | 56.5%        | 34.8%        | 38.9%        | 34.0%        |
| Designer boutiques                       | 45.6%        | 34.6%        | 42.5%        | 47.5%        | 30.4%        |
| Hotel stores                             | 49.7%        | 46.4%        | 33.8%        | 46.1%        | 37.2%        |
| Swap meet / flea markets                 | 36.3%        | 37.5%        | 26.4%        | 21.0%        | 26.0%        |
| Discount / outlet stores                 | 43.7%        | 29.3%        | 42.5%        | 39.3%        | 44.8%        |
| Supermarkets                             | 65.2%        | 46.0%        | 68.2%        | 67.9%        | 54.0%        |
| Convenience stores                       | 62.7%        | 60.0%        | 55.2%        | 55.8%        | 51.2%        |
| Duty free store                          | 9.1%         | 10.3%        | 5.0%         | 6.0%         | 5.6%         |
| <b>Culture</b>                           | <b>78.0%</b> | <b>73.8%</b> | <b>68.9%</b> | <b>74.1%</b> | <b>70.8%</b> |
| Historic site                            | 60.0%        | 56.3%        | 57.5%        | 46.3%        | 62.4%        |
| Museum / art gallery                     | 35.4%        | 27.6%        | 31.4%        | 34.4%        | 26.8%        |
| Polynesian show / luau                   | 41.4%        | 36.3%        | 25.8%        | 41.6%        | 20.8%        |
| Art / craft fair                         | 24.0%        | 13.2%        | 31.1%        | 24.3%        | 16.4%        |
| Festival                                 | 6.4%         | 6.5%         | 3.7%         | 5.1%         | 3.6%         |
| <b>Transportation</b>                    | <b>89.4%</b> | <b>85.6%</b> | <b>87.3%</b> | <b>88.7%</b> | <b>81.2%</b> |
| Trolley                                  | 8.0%         | 11.5%        | 1.3%         | 3.1%         | 1.2%         |
| Public Bus                               | 13.2%        | 20.3%        | 1.3%         | 2.3%         | 2.4%         |
| Taxi / limousine                         | 15.9%        | 23.3%        | 2.7%         | 6.8%         | 6.4%         |
| Rental car                               | 79.8%        | 62.8%        | 85.6%        | 85.2%        | 79.2%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated in by visitors.

**TABLE 5.3 Activity Participation by Island -- U.S. East**  
(% of U.S. East Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>93.4%</b> | <b>88.3%</b> | <b>94.3%</b> | <b>93.4%</b> | <b>93.9%</b> |
| Helicopter / airplane tour               | 17.2%        | 2.1%         | 32.0%        | 10.0%        | 15.8%        |
| Boat tour / submarine / whale watching   | 35.6%        | 15.5%        | 24.8%        | 37.7%        | 14.3%        |
| Tour bus excursion                       | 25.7%        | 27.6%        | 17.8%        | 16.1%        | 24.6%        |
| Private limousine / van tour             | 8.0%         | 6.0%         | 3.6%         | 5.4%         | 6.7%         |
| Self-guided                              | 80.7%        | 71.1%        | 67.7%        | 70.7%        | 64.4%        |
| <b>Recreation</b>                        | <b>89.8%</b> | <b>79.0%</b> | <b>70.7%</b> | <b>82.6%</b> | <b>64.1%</b> |
| Swimming / sunbathing / beach            | 84.0%        | 72.1%        | 62.8%        | 74.6%        | 53.5%        |
| Surfing/bodyboarding                     | 19.9%        | 15.2%        | 14.2%        | 15.9%        | 5.8%         |
| Snorkeling / scuba diving                | 45.0%        | 25.3%        | 33.8%        | 45.4%        | 30.1%        |
| Jet skiing / parasailing / windsurfing   | 5.0%         | 2.8%         | 0.9%         | 5.7%         | 1.8%         |
| Golf                                     | 13.9%        | 4.8%         | 13.3%        | 15.7%        | 10.3%        |
| Running / jogging / fitness walking      | 37.4%        | 32.0%        | 25.4%        | 33.5%        | 21.6%        |
| Gym / health spa                         | 16.7%        | 9.8%         | 10.6%        | 15.7%        | 12.5%        |
| Backpacking / hiking / camping           | 24.7%        | 15.6%        | 26.9%        | 15.0%        | 20.7%        |
| Sports event or tournament               | 4.5%         | 4.2%         | 1.2%         | 1.6%         | 2.1%         |
| <b>Entertainment</b>                     | <b>85.1%</b> | <b>77.3%</b> | <b>66.8%</b> | <b>77.5%</b> | <b>57.1%</b> |
| Lunch / sunset / dinner / evening cruise | 40.4%        | 31.2%        | 29.6%        | 37.4%        | 25.5%        |
| Lounge act / stage show                  | 34.4%        | 27.8%        | 16.6%        | 27.2%        | 14.3%        |
| Nightclub / dancing / bar / karaoke      | 22.3%        | 21.4%        | 10.0%        | 15.9%        | 8.8%         |
| Fine dining                              | 69.1%        | 58.6%        | 4.8%         | 63.7%        | 43.2%        |
| <b>Shopping</b>                          | <b>94.7%</b> | <b>89.4%</b> | <b>52.3%</b> | <b>87.5%</b> | <b>72.3%</b> |
| Department stores                        | 53.8%        | 52.9%        | 25.1%        | 36.5%        | 27.4%        |
| Designer boutiques                       | 43.8%        | 32.1%        | 31.4%        | 42.2%        | 21.3%        |
| Hotel stores                             | 59.2%        | 54.6%        | 31.1%        | 44.4%        | 30.7%        |
| Swap meet / flea markets                 | 35.7%        | 36.2%        | 15.7%        | 12.9%        | 15.5%        |
| Discount / outlet stores                 | 40.4%        | 27.2%        | 35.6%        | 30.6%        | 30.4%        |
| Supermarkets                             | 53.9%        | 29.5%        | 45.0%        | 52.1%        | 36.2%        |
| Convenience stores                       | 64.0%        | 59.4%        | 42.6%        | 52.6%        | 39.5%        |
| Duty free store                          | 9.8%         | 10.3%        | 3.0%         | 6.4%         | 5.5%         |
| <b>Culture</b>                           | <b>84.3%</b> | <b>80.4%</b> | <b>60.4%</b> | <b>73.7%</b> | <b>65.7%</b> |
| Historic site                            | 65.5%        | 66.5%        | 43.5%        | 42.0%        | 57.8%        |
| Museum / art gallery                     | 31.7%        | 25.8%        | 17.8%        | 25.0%        | 20.4%        |
| Polynesian show / luau                   | 54.0%        | 41.6%        | 25.4%        | 43.1%        | 21.3%        |
| Art / craft fair                         | 21.7%        | 14.1%        | 16.6%        | 17.5%        | 10.0%        |
| Festival                                 | 5.9%         | 4.5%         | 2.4%         | 3.8%         | 2.7%         |
| <b>Transportation</b>                    | <b>88.6%</b> | <b>82.8%</b> | <b>76.1%</b> | <b>81.0%</b> | <b>70.8%</b> |
| Trolley                                  | 10.0%        | 12.1%        | 0.3%         | 2.3%         | 3.0%         |
| Public Bus                               | 18.5%        | 23.5%        | 1.2%         | 4.3%         | 3.3%         |
| Taxi / limousine                         | 23.2%        | 27.9%        | 6.0%         | 9.8%         | 7.0%         |
| Rental car                               | 74.8%        | 53.0%        | 72.5%        | 76.0%        | 61.7%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated in by visitors.



**TABLE 5.4 Activity Participation by Island -- Japan**  
(% of Japanese Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>94.0%</b> | <b>91.8%</b> | <b>94.8%</b> | <b>90.8%</b> | <b>93.1%</b> |
| Helicopter / airplane tour               | 5.0%         | 2.7%         | 13.9%        | 7.3%         | 6.9%         |
| Boat tour / submarine / whale watching   | 16.8%        | 14.9%        | 7.5%         | 9.7%         | 6.3%         |
| Tour bus excursion                       | 40.1%        | 33.4%        | 60.1%        | 49.3%        | 50.3%        |
| Private limousine / van tour             | 17.0%        | 15.6%        | 3.5%         | 5.5%         | 12.2%        |
| Self-guided                              | 62.7%        | 61.1%        | 24.9%        | 37.8%        | 33.0%        |
| <b>Recreation</b>                        | <b>85.0%</b> | <b>82.5%</b> | <b>31.8%</b> | <b>52.2%</b> | <b>48.4%</b> |
| Swimming / sunbathing / beach            | 71.4%        | 70.1%        | 22.0%        | 36.5%        | 31.2%        |
| Surfing/bodyboarding                     | 9.0%         | 8.7%         | 2.3%         | 5.0%         | 1.3%         |
| Snorkeling / scuba diving                | 17.9%        | 15.7%        | 4.6%         | 12.6%        | 10.9%        |
| Jet skiing / parasailing / windsurfing   | 6.3%         | 6.2%         | 0.6%         | 2.6%         | 0.6%         |
| Golf                                     | 11.5%        | 9.4%         | 8.7%         | 12.6%        | 12.4%        |
| Running / jogging / fitness walking      | 17.8%        | 17.0%        | 9.8%         | 8.4%         | 9.7%         |
| Gym / health spa                         | 7.4%         | 6.6%         | 2.9%         | 2.4%         | 6.1%         |
| Backpacking / hiking / camping           | 7.1%         | 6.0%         | 4.0%         | 2.9%         | 5.3%         |
| Sports event or tournament               | 3.2%         | 2.8%         | 0.6%         | 1.0%         | 1.7%         |
| <b>Entertainment</b>                     | <b>89.6%</b> | <b>89.2%</b> | <b>43.4%</b> | <b>57.7%</b> | <b>58.5%</b> |
| Lunch / sunset / dinner / evening cruise | 49.5%        | 48.8%        | 13.9%        | 18.9%        | 22.9%        |
| Lounge act / stage show                  | 22.3%        | 22.0%        | 3.5%         | 4.2%         | 7.2%         |
| Nightclub / dancing / bar / karaoke      | 8.7%         | 8.7%         | 0.0%         | 2.6%         | 2.9%         |
| Fine dining                              | 74.3%        | 72.9%        | 35.8%        | 49.9%        | 49.7%        |
| <b>Shopping</b>                          | <b>98.5%</b> | <b>99.1%</b> | <b>34.7%</b> | <b>59.1%</b> | <b>53.1%</b> |
| Department stores                        | 57.4%        | 59.8%        | 5.2%         | 7.6%         | 5.1%         |
| Designer boutiques                       | 63.6%        | 64.7%        | 3.5%         | 21.5%        | 12.4%        |
| Hotel stores                             | 8.7%         | 8.7%         | 0.0%         | 2.6%         | 2.9%         |
| Swap meet / flea markets                 | 16.4%        | 15.9%        | 4.6%         | 4.7%         | 5.0%         |
| Discount / outlet stores                 | 43.1%        | 41.8%        | 9.8%         | 14.2%        | 17.1%        |
| Supermarkets                             | 58.4%        | 55.9%        | 22.5%        | 29.1%        | 29.0%        |
| Convenience stores                       | 79.3%        | 80.5%        | 15.0%        | 29.4%        | 21.3%        |
| Duty free store                          | 82.4%        | 84.2%        | 5.8%         | 12.1%        | 20.0%        |
| <b>Culture</b>                           | <b>56.5%</b> | <b>53.9%</b> | <b>26.6%</b> | <b>26.2%</b> | <b>32.0%</b> |
| Historic site                            | 28.7%        | 25.8%        | 17.3%        | 13.6%        | 23.6%        |
| Museum / art gallery                     | 21.8%        | 20.5%        | 4.0%         | 8.4%         | 8.2%         |
| Polynesian show / luau                   | 25.7%        | 24.5%        | 9.2%         | 7.3%         | 7.4%         |
| Art / craft fair                         | 4.4%         | 3.6%         | 1.7%         | 1.6%         | 3.0%         |
| Festival                                 | 6.2%         | 6.1%         | 0.6%         | 1.3%         | 1.1%         |
| <b>Transportation</b>                    | <b>94.3%</b> | <b>94.5%</b> | <b>28.9%</b> | <b>51.7%</b> | <b>43.6%</b> |
| Trolley                                  | 60.4%        | 62.4%        | 0.6%         | 8.1%         | 5.1%         |
| Public Bus                               | 30.7%        | 31.4%        | 1.2%         | 5.8%         | 1.3%         |
| Taxi / limousine                         | 47.0%        | 46.3%        | 7.5%         | 20.5%        | 16.2%        |
| Rental car                               | 21.1%        | 16.1%        | 20.2%        | 25.7%        | 24.6%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated by visitors.

**TABLE 5.5 Activity Participation by Island -- Canada**  
(% of Canadian Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>94.0%</b> | <b>89.4%</b> | <b>93.8%</b> | <b>91.7%</b> | <b>90.9%</b> |
| Helicopter / airplane tour               | 14.3%        | 1.2%         | 21.0%        | 9.0%         | 12.9%        |
| Boat tour / submarine / whale watching   | 31.4%        | 15.7%        | 21.4%        | 29.6%        | 12.2%        |
| Tour bus excursion                       | 27.5%        | 31.6%        | 21.8%        | 21.3%        | 26.2%        |
| Private limousine / van tour             | 10.7%        | 9.2%         | 4.7%         | 6.5%         | 8.0%         |
| Self-guided                              | 79.9%        | 68.4%        | 64.2%        | 69.3%        | 63.1%        |
| <b>Recreation</b>                        | <b>92.3%</b> | <b>82.9%</b> | <b>72.0%</b> | <b>80.3%</b> | <b>66.5%</b> |
| Swimming / sunbathing / beach            | 87.8%        | 77.3%        | 65.0%        | 73.5%        | 60.1%        |
| Surfing/bodyboarding                     | 25.2%        | 18.7%        | 10.9%        | 20.9%        | 7.6%         |
| Snorkeling / scuba diving                | 49.3%        | 30.4%        | 30.7%        | 40.6%        | 35.0%        |
| Jet skiing / parasailing / windsurfing   | 3.7%         | 1.4%         | 0.0%         | 11.9%        | 1.5%         |
| Golf                                     | 14.2%        | 4.9%         | 13.6%        | 34.1%        | 7.6%         |
| Running / jogging / fitness walking      | 41.6%        | 35.6%        | 28.4%        | 34.1%        | 22.8%        |
| Gym / health spa                         | 11.5%        | 5.6%         | 5.1%         | 9.4%         | 8.4%         |
| Backpacking / hiking / camping           | 23.2%        | 14.3%        | 21.4%        | 15.0%        | 22.8%        |
| Sports event or tournament               | 7.2%         | 6.5%         | 1.2%         | 4.0%         | 3.0%         |
| <b>Entertainment</b>                     | <b>81.9%</b> | <b>78.0%</b> | <b>52.1%</b> | <b>68.8%</b> | <b>51.7%</b> |
| Lunch / sunset / dinner / evening cruise | 40.5%        | 37.5%        | 19.5%        | 31.2%        | 24.3%        |
| Lounge act / stage show                  | 36.1%        | 33.2%        | 18.3%        | 22.4%        | 15.6%        |
| Nightclub / dancing / bar / karaoke      | 17.1%        | 16.4%        | 7.4%         | 11.0%        | 6.8%         |
| Fine dining                              | 61.3%        | 52.0%        | 38.9%        | 52.9%        | 33.5%        |
| <b>Shopping</b>                          | <b>96.6%</b> | <b>92.1%</b> | <b>74.3%</b> | <b>85.9%</b> | <b>77.9%</b> |
| Department stores                        | 65.2%        | 62.1%        | 31.5%        | 47.3%        | 36.9%        |
| Designer boutiques                       | 45.1%        | 33.5%        | 26.5%        | 39.9%        | 25.9%        |
| Hotel stores                             | 49.5%        | 48.5%        | 22.6%        | 31.2%        | 27.0%        |
| Swap meet / flea markets                 | 40.6%        | 38.6%        | 16.3%        | 21.3%        | 20.9%        |
| Discount / outlet stores                 | 45.4%        | 30.2%        | 29.2%        | 37.4%        | 33.1%        |
| Supermarkets                             | 69.2%        | 30.2%        | 49.4%        | 59.6%        | 47.1%        |
| Convenience stores                       | 67.8%        | 64.7%        | 45.1%        | 52.7%        | 41.4%        |
| Duty free store                          | 15.2%        | 14.7%        | 4.3%         | 10.1%        | 6.5%         |
| <b>Culture</b>                           | <b>79.0%</b> | <b>73.3%</b> | <b>53.3%</b> | <b>65.7%</b> | <b>64.3%</b> |
| Historic site                            | 61.9%        | 57.2%        | 43.2%        | 46.4%        | 55.5%        |
| Museum / art gallery                     | 31.4%        | 24.1%        | 14.4%        | 26.5%        | 18.6%        |
| Polynesian show / luau                   | 51.1%        | 43.1%        | 21.4%        | 34.3%        | 18.6%        |
| Art / craft fair                         | 20.7%        | 11.3%        | 14.8%        | 16.8%        | 25.5%        |
| Festival                                 | 6.2%         | 4.5%         | 2.7%         | 3.1%         | 3.0%         |
| <b>Transportation</b>                    | <b>91.5%</b> | <b>87.8%</b> | <b>68.9%</b> | <b>79.8%</b> | <b>66.9%</b> |
| Trolley                                  | 11.7%        | 16.2%        | 1.9%         | 3.1%         | 1.9%         |
| Public Bus                               | 30.4%        | 43.8%        | 4.3%         | 8.1%         | 5.7%         |
| Taxi / limousine                         | 30.2%        | 34.6%        | 7.0%         | 14.1%        | 11.0%        |
| Rental car                               | 69.7%        | 44.3%        | 59.5%        | 68.4%        | 55.9%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated by visitors.

**TABLE 5.6 Activity Participation by Island -- Europe**  
(% of European Visitors by Island)

| Activity                                 | State        | Oahu         | Kauai        | Maui         | Big Island   |
|--|--------------|--------------|--------------|--------------|--------------|
| <b>Sightseeing</b>                       | <b>95.8%</b> | <b>93.6%</b> | <b>97.5%</b> | <b>95.1%</b> | <b>96.7%</b> |
| Helicopter / airplane tour               | 18.9%        | 5.4%         | 29.4%        | 7.9%         | 18.1%        |
| Boat tour / submarine / whale watching   | 31.2%        | 18.4%        | 18.9%        | 30.5%        | 11.2%        |
| Tour bus excursion                       | 40.3%        | 43.0%        | 19.8%        | 20.7%        | 26.6%        |
| Private limousine / van tour             | 16.9%        | 12.3%        | 12.5%        | 14.2%        | 16.0%        |
| Self-guided                              | 72.0%        | 64.2%        | 71.3%        | 68.1%        | 66.8%        |
| <b>Recreation</b>                        | <b>91.1%</b> | <b>85.7%</b> | <b>74.7%</b> | <b>81.3%</b> | <b>64.5%</b> |
| Swimming / sunbathing / beach            | 88.7%        | 83.2%        | 71.7%        | 78.1%        | 59.8%        |
| Surfing/bodyboarding                     | 18.9%        | 16.5%        | 9.6%         | 13.4%        | 6.4%         |
| Snorkeling / scuba diving                | 37.2%        | 25.7%        | 26.4%        | 34.0%        | 28.0%        |
| Jet skiing / parasailing / windsurfing   | 3.8%         | 2.6%         | 0.7%         | 3.7%         | 1.0%         |
| Golf                                     | 7.4%         | 4.4%         | 5.9%         | 6.3%         | 4.2%         |
| Running / jogging / fitness walking      | 23.2%        | 20.0%        | 16.8%        | 18.2%        | 14.9%        |
| Gym / health spa                         | 7.8%         | 5.7%         | 4.3%         | 5.5%         | 4.2%         |
| Backpacking / hiking / camping           | 18.8%        | 11.3%        | 25.7%        | 16.9%        | 22.2%        |
| Sports event or tournament               | 5.3%         | 4.4%         | 1.1%         | 1.7%         | 3.8%         |
| <b>Entertainment</b>                     | <b>81.5%</b> | <b>20.0%</b> | <b>57.2%</b> | <b>66.7%</b> | <b>51.8%</b> |
| Lunch / sunset / dinner / evening cruise | 41.7%        | 37.2%        | 24.6%        | 32.0%        | 28.0%        |
| Lounge act / stage show                  | 29.5%        | 25.5%        | 12.3%        | 15.6%        | 9.1%         |
| Nightclub / dancing / bar / karaoke      | 25.7%        | 26.3%        | 9.3%         | 12.7%        | 8.1%         |
| Fine dining                              | 57.0%        | 49.9%        | 39.4%        | 45.7%        | 31.4%        |
| <b>Shopping</b>                          | <b>97.1%</b> | <b>95.9%</b> | <b>79.5%</b> | <b>84.5%</b> | <b>77.5%</b> |
| Department stores                        | 74.8%        | 76.9%        | 35.5%        | 46.6%        | 37.6%        |
| Designer boutiques                       | 41.7%        | 38.7%        | 14.4%        | 26.0%        | 13.4%        |
| Hotel stores                             | 51.4%        | 49.8%        | 20.5%        | 27.7%        | 21.4%        |
| Swap meet / flea markets                 | 32.5%        | 31.7%        | 10.5%        | 13.3%        | 10.0%        |
| Discount / outlet stores                 | 38.4%        | 32.3%        | 20.0%        | 26.7%        | 24.9%        |
| Supermarkets                             | 73.3%        | 64.5%        | 62.9%        | 63.7%        | 60.0%        |
| Convenience stores                       | 55.3%        | 53.2%        | 29.2%        | 35.8%        | 28.1%        |
| Duty free store                          | 21.5%        | 20.5%        | 6.2%         | 9.9%         | 7.6%         |
| <b>Culture</b>                           | <b>83.5%</b> | <b>80.3%</b> | <b>56.3%</b> | <b>62.3%</b> | <b>67.5%</b> |
| Historic site                            | 68.9%        | 65.7%        | 45.3%        | 46.2%        | 60.1%        |
| Museum / art gallery                     | 32.7%        | 28.8%        | 12.8%        | 21.4%        | 19.9%        |
| Polynesian show / luau                   | 47.0%        | 41.4%        | 19.1%        | 24.5%        | 19.9%        |
| Art / craft fair                         | 16.7%        | 11.1%        | 11.6%        | 13.9%        | 7.8%         |
| Festival                                 | 6.8%         | 6.5%         | 0.7%         | 2.8%         | 2.1%         |
| <b>Transportation</b>                    | <b>92.3%</b> | <b>89.9%</b> | <b>80.4%</b> | <b>82.4%</b> | <b>77.1%</b> |
| Trolley                                  | 21.4%        | 24.4%        | 2.3%         | 7.1%         | 2.5%         |
| Public Bus                               | 42.0%        | 48.5%        | 3.4%         | 13.5%        | 6.8%         |
| Taxi / limousine                         | 37.7%        | 38.9%        | 12.3%        | 18.7%        | 12.2%        |
| Rental car                               | 54.8%        | 35.5%        | 71.7%        | 64.5%        | 64.5%        |

Note: Percentages sum more than 100 percent due to multiple island visitation and multiple activities participated by visitors.

**TABLE 5.7 Activity Participation by Lifestage -- U.S. Total**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |              |              |              | Visitation Status |                    |
|--|--------------------------------|--------------|--------------|--------------|--------------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family       | Young        | Middle Age   | Seniors      | First Timers      | Repeat<br>Visitors |
| <b>Sightseeing</b>                       | <b>87.7%</b>                   | <b>93.4%</b> | <b>93.1%</b> | <b>91.9%</b> | <b>92.6%</b> | <b>95.7%</b>      | <b>91.0%</b>       |
| Helicopter / airplane tour               | 8.2%                           | 12.8%        | 13.3%        | 15.9%        | 14.8%        | 20.5%             | 11.5%              |
| Boat tour / submarine / whale watching   | 26.0%                          | 34.3%        | 32.6%        | 31.2%        | 29.6%        | 38.0%             | 28.0%              |
| Tour bus excursion                       | 11.0%                          | 12.8%        | 16.2%        | 18.9%        | 23.8%        | 29.8%             | 12.8%              |
| Private limousine / van tour             | 5.5%                           | 5.4%         | 4.1%         | 5.8%         | 8.5%         | 8.9%              | 4.9%               |
| Self-guided                              | 79.5%                          | 85.1%        | 86.7%        | 81.6%        | 79.7%        | 80.6%             | 83.7%              |
| <b>Recreation</b>                        | <b>91.8%</b>                   | <b>96.5%</b> | <b>98.3%</b> | <b>91.9%</b> | <b>82.5%</b> | <b>91.2%</b>      | <b>91.6%</b>       |
| Swimming / sunbathing / beach            | 84.9%                          | 92.9%        | 95.2%        | 83.4%        | 71.6%        | 86.2%             | 83.3%              |
| Surfing/body boarding                    | 20.5%                          | 45.6%        | 36.9%        | 17.9%        | 9.4%         | 21.6%             | 25.3%              |
| Snorkeling / scuba diving                | 46.6%                          | 66.2%        | 65.3%        | 45.9%        | 32.6%        | 54.7%             | 46.9%              |
| Jet skiing / parasailing / windsurfing   | 5.5%                           | 8.7%         | 8.1%         | 4.9%         | 2.4%         | 6.3%              | 5.2%               |
| Golf                                     | 15.1%                          | 17.5%        | 9.5%         | 15.4%        | 14.5%        | 9.8%              | 16.5%              |
| Running / jogging / fitness walking      | 39.7%                          | 40.7%        | 39.8%        | 42.1%        | 36.4%        | 31.6%             | 44.0%              |
| Gym / health spa                         | 19.2%                          | 21.7%        | 20.1%        | 19.2%        | 9.7%         | 14.5%             | 18.5%              |
| Backpacking / hiking / camping           | 23.3%                          | 23.2%        | 41.7%        | 24.7%        | 11.0%        | 29.7%             | 21.4%              |
| Sports event or tournament               | 4.1%                           | 4.0%         | 6.8%         | 4.9%         | 3.7%         | 3.8%              | 5.1%               |
| <b>Entertainment</b>                     | <b>83.6%</b>                   | <b>82.5%</b> | <b>89.8%</b> | <b>85.7%</b> | <b>80.9%</b> | <b>87.9%</b>      | <b>83.1%</b>       |
| Lunch / sunset / dinner / evening cruise | 45.2%                          | 35.5%        | 44.4%        | 37.3%        | 33.3%        | 43.6%             | 34.7%              |
| Lounge act / stage show                  | 26.0%                          | 36.2%        | 33.8%        | 32.8%        | 29.7%        | 42.9%             | 27.7%              |
| Nightclub / dancing / bar / karaoke      | 27.4%                          | 14.4%        | 38.2%        | 22.1%        | 12.1%        | 22.7%             | 20.6%              |
| Fine dining                              | 65.8%                          | 62.4%        | 70.1%        | 71.5%        | 68.6%        | 67.9%             | 69.5%              |
| <b>Shopping</b>                          | <b>94.5%</b>                   | <b>96.9%</b> | <b>96.5%</b> | <b>94.7%</b> | <b>94.0%</b> | <b>95.5%</b>      | <b>95.2%</b>       |
| Department stores                        | 61.6%                          | 55.6%        | 48.8%        | 54.3%        | 53.2%        | 52.9%             | 53.6%              |
| Designer boutiques                       | 42.5%                          | 51.1%        | 45.9%        | 44.5%        | 41.4%        | 44.6%             | 45.4%              |
| Hotel stores                             | 53.4%                          | 58.9%        | 57.1%        | 53.4%        | 52.5%        | 59.5%             | 52.8%              |
| Swap meet / flea markets                 | 31.5%                          | 36.4%        | 40.3%        | 35.5%        | 33.3%        | 36.9%             | 35.2%              |
| Discount / outlet stores                 | 38.4%                          | 49.9%        | 42.7%        | 40.7%        | 41.3%        | 40.1%             | 44.1%              |
| Supermarkets                             | 60.3%                          | 68.8%        | 62.5%        | 57.0%        | 56.9%        | 49.7%             | 65.2%              |
| Convenience stores                       | 74.0%                          | 66.9%        | 71.4%        | 63.0%        | 56.3%        | 65.5%             | 62.9%              |
| Duty free store                          | 11.0%                          | 11.6%        | 14.3%        | 8.6%         | 6.1%         | 10.5%             | 9.2%               |
| <b>Culture</b>                           | <b>74.0%</b>                   | <b>86.3%</b> | <b>84.6%</b> | <b>79.9%</b> | <b>79.7%</b> | <b>91.0%</b>      | <b>77.4%</b>       |
| Historic site                            | 52.1%                          | 63.4%        | 65.3%        | 63.0%        | 61.5%        | 70.9%             | 59.3%              |
| Museum / art gallery                     | 27.4%                          | 33.8%        | 28.0%        | 34.2%        | 38.1%        | 31.7%             | 35.0%              |
| Polynesian show / luau                   | 38.4%                          | 57.9%        | 54.2%        | 44.6%        | 41.7%        | 66.8%             | 38.5%              |
| Art / craft fair                         | 27.4%                          | 23.2%        | 18.9%        | 23.4%        | 25.9%        | 18.4%             | 25.6%              |
| Festival                                 | 11.0%                          | 5.0%         | 4.4%         | 5.8%         | 8.0%         | 5.5%              | 6.5%               |
| <b>Transportation</b>                    | <b>90.4%</b>                   | <b>91.5%</b> | <b>87.5%</b> | <b>91.0%</b> | <b>89.0%</b> | <b>89.5%</b>      | <b>90.0%</b>       |
| Trolley                                  | 12.3%                          | 9.5%         | 8.5%         | 8.8%         | 9.0%         | 11.4%             | 7.9%               |
| Public Bus                               | 17.8%                          | 15.4%        | 14.5%        | 15.3%        | 18.2%        | 19.4%             | 14.2%              |
| Taxi / limousine                         | 23.3%                          | 19.9%        | 23.0%        | 19.1%        | 17.8%        | 24.0%             | 17.6%              |
| Rental car                               | 78.1%                          | 82.5%        | 76.3%        | 79.5%        | 74.8%        | 74.4%             | 80.1%              |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.

**TABLE 5.8 Activity Participation by Lifestage -- U.S. West**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |              |              |              | Visitation Status |                    |
|--|--------------------------------|--------------|--------------|--------------|--------------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family       | Young        | Middle Age   | Seniors      | First<br>Timers   | Repeat<br>Visitors |
| <b>Sightseeing</b>                       | <b>89.7%</b>                   | <b>91.3%</b> | <b>91.2%</b> | <b>90.6%</b> | <b>91.6%</b> | <b>96.2%</b>      | <b>89.7%</b>       |
| Helicopter / airplane tour               | 5.1%                           | 8.7%         | 9.6%         | 13.4%        | 12.3%        | 15.8%             | 9.9%               |
| Boat tour / submarine / whale watching   | 17.9%                          | 28.3%        | 29.3%        | 26.7%        | 24.6%        | 37.0%             | 23.4%              |
| Tour bus excursion                       | 5.1%                           | 10.9%        | 10.0%        | 9.4%         | 16.8%        | 20.5%             | 8.8%               |
| Private limousine / van tour             | 2.6%                           | 4.9%         | 1.3%         | 4.0%         | 7.2%         | 8.6%              | 3.4%               |
| Self-guided                              | 84.6%                          | 84.5%        | 87.4%        | 82.6%        | 83.5%        | 85.3%             | 84.1%              |
| <b>Recreation</b>                        | <b>92.3%</b>                   | <b>95.8%</b> | <b>98.3%</b> | <b>92.7%</b> | <b>85.9%</b> | <b>92.5%</b>      | <b>92.9%</b>       |
| Swimming / sunbathing / beach            | 84.6%                          | 90.9%        | 95.0%        | 83.5%        | 71.2%        | 87.3%             | 83.4%              |
| Surfing/body boarding                    | 25.6%                          | 46.8%        | 42.3%        | 21.4%        | 11.1%        | 27.7%             | 28.2%              |
| Snorkeling / scuba diving                | 48.7%                          | 66.8%        | 66.1%        | 50.1%        | 37.8%        | 63.4%             | 50.3%              |
| Jet skiing / parasailing / windsurfing   | 5.1%                           | 7.9%         | 9.2%         | 5.3%         | 3.0%         | 6.5%              | 5.9%               |
| Golf                                     | 10.3%                          | 16.2%        | 8.8%         | 15.8%        | 16.2%        | 6.8%              | 16.8%              |
| Running / jogging / fitness walking      | 33.3%                          | 35.5%        | 38.9%        | 47.9%        | 41.7%        | 28.1%             | 46.0%              |
| Gym / health spa                         | 17.9%                          | 17.7%        | 19.7%        | 20.9%        | 11.4%        | 13.7%             | 18.8%              |
| Backpacking / hiking / camping           | 23.1%                          | 23.4%        | 42.7%        | 22.7%        | 10.8%        | 31.8%             | 21.2%              |
| Sports event or tournament               | 7.7%                           | 4.9%         | 6.3%         | 5.3%         | 3.6%         | 3.8%              | 5.4%               |
| <b>Entertainment</b>                     | <b>84.6%</b>                   | <b>80.4%</b> | <b>88.3%</b> | <b>84.2%</b> | <b>82.3%</b> | <b>89.0%</b>      | <b>82.2%</b>       |
| Lunch / sunset / dinner / evening cruise | 41.0%                          | 32.5%        | 46.0%        | 34.1%        | 29.1%        | 43.5%             | 32.4%              |
| Lounge act / stage show                  | 25.6%                          | 36.2%        | 28.9%        | 30.3%        | 28.8%        | 41.4%             | 27.9%              |
| Nightclub / dancing / bar / karaoke      | 33.3%                          | 15.1%        | 38.1%        | 20.0%        | 11.7%        | 23.3%             | 19.8%              |
| Fine dining                              | 61.5%                          | 60.4%        | 67.8%        | 71.3%        | 70.6%        | 66.4%             | 68.7%              |
| <b>Shopping</b>                          | <b>97.4%</b>                   | <b>97.0%</b> | <b>97.9%</b> | <b>93.8%</b> | <b>94.6%</b> | <b>96.6%</b>      | <b>95.2%</b>       |
| Department stores                        | 71.8%                          | 55.8%        | 52.3%        | 49.7%        | 53.2%        | 55.1%             | 52.4%              |
| Designer boutiques                       | 35.9%                          | 51.7%        | 44.4%        | 43.4%        | 47.4%        | 43.8%             | 46.8%              |
| Hotel stores                             | 43.6%                          | 57.0%        | 53.6%        | 46.8%        | 48.3%        | 55.1%             | 49.3%              |
| Swap meet / flea markets                 | 30.8%                          | 35.5%        | 42.3%        | 36.7%        | 32.4%        | 41.1%             | 34.7%              |
| Discount / outlet stores                 | 43.6%                          | 48.3%        | 43.5%        | 42.1%        | 45.3%        | 43.8%             | 44.6%              |
| Supermarkets                             | 64.1%                          | 71.3%        | 69.0%        | 64.1%        | 61.6%        | 60.3%             | 67.5%              |
| Convenience stores                       | 71.8%                          | 67.5%        | 72.4%        | 61.2%        | 55.0%        | 67.1%             | 62.1%              |
| Duty free store                          | 15.4%                          | 8.3%         | 15.9%        | 8.2%         | 6.6%         | 11.0%             | 8.9%               |
| <b>Culture</b>                           | <b>74.4%</b>                   | <b>83.8%</b> | <b>81.2%</b> | <b>75.3%</b> | <b>78.4%</b> | <b>91.8%</b>      | <b>75.3%</b>       |
| Historic site                            | 51.3%                          | 60.0%        | 61.5%        | 59.7%        | 61.6%        | 66.8%             | 58.8%              |
| Museum / art gallery                     | 30.8%                          | 34.3%        | 31.0%        | 34.5%        | 41.4%        | 34.9%             | 36.0%              |
| Polynesian show / luau                   | 33.3%                          | 55.8%        | 44.8%        | 36.1%        | 37.8%        | 65.1%             | 35.2%              |
| Art / craft fair                         | 28.2%                          | 23.8%        | 20.1%        | 23.6%        | 28.8%        | 19.2%             | 26.0%              |
| Festival                                 | 10.3%                          | 4.9%         | 5.9%         | 5.1%         | 9.6%         | 6.5%              | 6.6%               |
| <b>Transportation</b>                    | <b>94.9%</b>                   | <b>89.1%</b> | <b>87.9%</b> | <b>92.2%</b> | <b>90.7%</b> | <b>92.1%</b>      | <b>90.0%</b>       |
| Trolley                                  | 7.7%                           | 7.5%         | 7.9%         | 8.9%         | 8.1%         | 11.6%             | 7.4%               |
| Public Bus                               | 15.4%                          | 15.1%        | 13.0%        | 12.5%        | 14.4%        | 17.1%             | 12.5%              |
| Taxi / limousine                         | 23.1%                          | 14.3%        | 20.5%        | 14.7%        | 16.2%        | 18.2%             | 15.7%              |
| Rental car                               | 79.5%                          | 81.1%        | 76.2%        | 83.7%        | 79.3%        | 78.1%             | 81.4%              |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.

**TABLE 5.9 Activity Participation by Lifestage -- U.S. East**  
 (% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |              |              |              | Visitation Status |                 |
|--|--------------------------------|--------------|--------------|--------------|--------------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family       | Young        | Middle Age   | Seniors      | First Timers      | Repeat Visitors |
| <b>Sightseeing</b>                       | <b>85.3%</b>                   | <b>96.8%</b> | <b>94.6%</b> | <b>93.2%</b> | <b>93.5%</b> | <b>95.4%</b>      | <b>92.7%</b>    |
| Helicopter / airplane tour               | 11.8%                          | 19.6%        | 16.5%        | 18.5%        | 17.0%        | 23.0%             | 13.8%           |
| Boat tour / submarine / whale watching   | 35.3%                          | 44.3%        | 35.5%        | 35.9%        | 34.1%        | 38.6%             | 34.7%           |
| Tour bus excursion                       | 17.6%                          | 15.8%        | 21.5%        | 28.9%        | 30.0%        | 34.8%             | 18.6%           |
| Private limousine / van tour             | 8.8%                           | 6.3%         | 6.5%         | 7.7%         | 9.7%         | 9.1%              | 7.1%            |
| Self-guided                              | 73.5%                          | 86.1%        | 86.0%        | 80.5%        | 76.2%        | 78.1%             | 83.2%           |
| <b>Recreation</b>                        | <b>91.2%</b>                   | <b>97.5%</b> | <b>98.2%</b> | <b>91.1%</b> | <b>79.5%</b> | <b>90.5%</b>      | <b>89.8%</b>    |
| Swimming / sunbathing / beach            | 85.3%                          | 96.2%        | 95.3%        | 83.3%        | 71.9%        | 85.6%             | 83.2%           |
| Surfing/body boarding                    | 14.7%                          | 43.7%        | 32.3%        | 14.3%        | 7.8%         | 18.4%             | 21.2%           |
| Snorkeling / scuba diving                | 44.1%                          | 65.2%        | 64.5%        | 41.5%        | 27.8%        | 50.1%             | 42.1%           |
| Jet skiing / parasailing / windsurfing   | 5.9%                           | 10.1%        | 7.2%         | 4.5%         | 1.9%         | 6.2%              | 4.3%            |
| Golf                                     | 20.6%                          | 19.6%        | 10.0%        | 15.0%        | 13.0%        | 11.3%             | 16.1%           |
| Running / jogging / fitness walking      | 47.1%                          | 49.4%        | 40.5%        | 35.9%        | 31.6%        | 33.5%             | 41.0%           |
| Gym / health spa                         | 20.6%                          | 28.5%        | 20.4%        | 17.4%        | 8.1%         | 14.9%             | 18.2%           |
| Backpacking / hiking / camping           | 23.5%                          | 22.8%        | 40.9%        | 26.8%        | 11.1%        | 28.6%             | 21.6%           |
| Sports event or tournament               | 0.0%                           | 2.5%         | 7.2%         | 4.5%         | 3.8%         | 3.8%              | 4.7%            |
| <b>Entertainment</b>                     | <b>82.4%</b>                   | <b>86.1%</b> | <b>91.0%</b> | <b>87.3%</b> | <b>79.7%</b> | <b>87.2%</b>      | <b>84.5%</b>    |
| Lunch / sunset / dinner / evening cruise | 50.0%                          | 40.5%        | 43.0%        | 40.6%        | 37.0%        | 43.7%             | 38.0%           |
| Lounge act / stage show                  | 26.5%                          | 36.1%        | 38.0%        | 35.4%        | 30.5%        | 43.7%             | 27.5%           |
| Nightclub / dancing / bar / karaoke      | 20.6%                          | 13.3%        | 38.4%        | 24.2%        | 12.4%        | 22.4%             | 21.9%           |
| Fine dining                              | 70.6%                          | 65.8%        | 72.0%        | 71.8%        | 66.8%        | 68.7%             | 70.7%           |
| <b>Shopping</b>                          | <b>91.2%</b>                   | <b>96.8%</b> | <b>95.3%</b> | <b>95.8%</b> | <b>93.5%</b> | <b>94.9%</b>      | <b>95.2%</b>    |
| Department stores                        | 50.0%                          | 55.1%        | 45.9%        | 59.2%        | 53.2%        | 51.7%             | 55.5%           |
| Designer boutiques                       | 50.0%                          | 50.0%        | 47.3%        | 45.5%        | 35.9%        | 45.0%             | 43.2%           |
| Hotel stores                             | 64.7%                          | 62.0%        | 60.2%        | 60.3%        | 56.2%        | 61.7%             | 57.9%           |
| Swap meet / flea markets                 | 32.4%                          | 38.0%        | 38.7%        | 34.3%        | 34.1%        | 34.6%             | 36.0%           |
| Discount / outlet stores                 | 32.4%                          | 52.5%        | 41.9%        | 39.2%        | 37.6%        | 38.1%             | 43.4%           |
| Supermarkets                             | 55.9%                          | 64.6%        | 57.0%        | 49.5%        | 52.7%        | 44.1%             | 61.9%           |
| Convenience stores                       | 76.5%                          | 65.8%        | 70.6%        | 64.8%        | 57.6%        | 64.7%             | 64.0%           |
| Duty free store                          | 5.9%                           | 17.1%        | 12.9%        | 8.9%         | 5.7%         | 10.2%             | 9.5%            |
| <b>Culture</b>                           | <b>73.5%</b>                   | <b>90.5%</b> | <b>87.5%</b> | <b>84.7%</b> | <b>80.8%</b> | <b>90.5%</b>      | <b>80.5%</b>    |
| Historic site                            | 52.9%                          | 69.0%        | 68.5%        | 66.4%        | 61.4%        | 73.0%             | 60.0%           |
| Museum / art gallery                     | 23.5%                          | 32.9%        | 25.4%        | 33.8%        | 35.1%        | 30.1%             | 33.6%           |
| Polynesian show / luau                   | 44.1%                          | 61.4%        | 62.4%        | 53.5%        | 45.1%        | 67.8%             | 43.2%           |
| Art / craft fair                         | 26.5%                          | 22.2%        | 17.9%        | 23.2%        | 23.2%        | 18.0%             | 25.0%           |
| Festival                                 | 11.8%                          | 5.1%         | 3.2%         | 6.6%         | 6.5%         | 4.9%              | 6.3%            |
| <b>Transportation</b>                    | <b>85.3%</b>                   | <b>95.6%</b> | <b>87.1%</b> | <b>89.7%</b> | <b>87.6%</b> | <b>88.2%</b>      | <b>90.0%</b>    |
| Trolley                                  | 17.6%                          | 12.7%        | 9.0%         | 8.7%         | 9.7%         | 11.3%             | 8.5%            |
| Public Bus                               | 20.6%                          | 15.8%        | 15.8%        | 18.3%        | 21.6%        | 20.6%             | 16.8%           |
| Taxi / limousine                         | 23.5%                          | 29.1%        | 25.1%        | 23.7%        | 19.2%        | 27.1%             | 20.2%           |
| Rental car                               | 76.5%                          | 84.8%        | 76.3%        | 75.1%        | 70.8%        | 72.5%             | 78.1%           |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.

**TABLE 5.10 Activity Participation by Lifestage -- Japan**  
(% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |              |              |              | Visitation Status |                 |
|--|--------------------------------|--------------|--------------|--------------|--------------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family       | Young        | Middle Age   | Seniors      | First Timers      | Repeat Visitors |
| <b>Sightseeing</b>                       | <b>96.9%</b>                   | <b>93.8%</b> | <b>94.7%</b> | <b>93.0%</b> | <b>93.8%</b> | <b>97.0%</b>      | <b>92.0%</b>    |
| Helicopter / airplane tour               | 7.6%                           | 3.4%         | 2.9%         | 4.0%         | 9.9%         | 5.1%              | 4.6%            |
| Boat tour / submarine / whale watching   | 24.4%                          | 18.4%        | 16.4%        | 14.5%        | 16.4%        | 20.8%             | 12.6%           |
| Tour bus excursion                       | 39.7%                          | 37.4%        | 38.5%        | 37.9%        | 48.0%        | 53.1%             | 32.8%           |
| Private limousine / van tour             | 26.7%                          | 15.6%        | 15.8%        | 17.0%        | 18.5%        | 19.8%             | 15.1%           |
| Self-guided                              | 63.4%                          | 64.2%        | 65.7%        | 64.6%        | 55.0%        | 54.3%             | 67.6%           |
| <b>Recreation</b>                        | <b>90.8%</b>                   | <b>88.3%</b> | <b>90.8%</b> | <b>82.2%</b> | <b>76.0%</b> | <b>82.6%</b>      | <b>87.1%</b>    |
| Swimming / sunbathing / beach            | 82.4%                          | 79.1%        | 81.3%        | 67.2%        | 52.1%        | 73.1%             | 72.3%           |
| Surfing/body boarding                    | 9.9%                           | 10.4%        | 15.3%        | 7.7%         | 1.4%         | 6.7%              | 10.7%           |
| Snorkeling / scuba diving                | 23.7%                          | 19.1%        | 29.3%        | 14.5%        | 6.5%         | 19.6%             | 17.5%           |
| Jet skiing / parasailing / windsurfing   | 9.2%                           | 4.8%         | 14.5%        | 4.1%         | 1.7%         | 8.8%              | 5.0%            |
| Golf                                     | 6.9%                           | 10.1%        | 4.5%         | 13.1%        | 19.9%        | 5.5%              | 14.2%           |
| Running / jogging / fitness walking      | 14.5%                          | 18.3%        | 13.3%        | 20.6%        | 19.9%        | 13.3%             | 19.8%           |
| Gym / health spa                         | 13.7%                          | 6.8%         | 9.9%         | 8.1%         | 3.8%         | 5.3%              | 8.3%            |
| Backpacking / hiking / camping           | 3.8%                           | 8.1%         | 8.9%         | 6.3%         | 5.6%         | 6.0%              | 8.1%            |
| Sports event or tournament               | 3.8%                           | 2.5%         | 3.6%         | 2.1%         | 4.9%         | 3.0%              | 3.5%            |
| <b>Entertainment</b>                     | <b>95.4%</b>                   | <b>88.8%</b> | <b>94.2%</b> | <b>88.1%</b> | <b>86.2%</b> | <b>91.8%</b>      | <b>88.4%</b>    |
| Lunch / sunset / dinner / evening cruise | 63.4%                          | 48.6%        | 54.3%        | 45.5%        | 47.1%        | 58.9%             | 43.0%           |
| Lounge act / stage show                  | 24.4%                          | 22.8%        | 18.1%        | 22.3%        | 25.5%        | 25.7%             | 20.3%           |
| Nightclub / dancing / bar / karaoke      | 9.9%                           | 7.4%         | 8.9%         | 10.7%        | 8.4%         | 8.2%              | 8.9%            |
| Fine dining                              | 81.7%                          | 75.6%        | 81.5%        | 72.6%        | 65.0%        | 71.8%             | 76.3%           |
| <b>Shopping</b>                          | <b>99.2%</b>                   | <b>98.8%</b> | <b>98.8%</b> | <b>98.0%</b> | <b>98.0%</b> | <b>98.7%</b>      | <b>98.4%</b>    |
| Department stores                        | 69.5%                          | 57.6%        | 69.9%        | 53.6%        | 45.6%        | 55.2%             | 58.9%           |
| Designer boutiques                       | 76.3%                          | 64.8%        | 72.7%        | 62.1%        | 51.5%        | 59.6%             | 65.6%           |
| Hotel stores                             | 9.9%                           | 7.4%         | 8.9%         | 10.7%        | 8.4%         | 8.2%              | 8.9%            |
| Swap meet / flea markets                 | 14.5%                          | 17.0%        | 16.4%        | 15.5%        | 16.7%        | 14.8%             | 16.5%           |
| Discount / outlet stores                 | 35.1%                          | 50.0%        | 46.0%        | 40.8%        | 35.6%        | 40.5%             | 45.2%           |
| Supermarkets                             | 58.8%                          | 60.4%        | 59.7%        | 60.9%        | 51.1%        | 48.3%             | 64.3%           |
| Convenience stores                       | 80.2%                          | 81.1%        | 87.7%        | 80.8%        | 66.1%        | 78.9%             | 80.1%           |
| Duty free store                          | 89.3%                          | 84.6%        | 87.3%        | 81.3%        | 74.9%        | 85.2%             | 81.7%           |
| <b>Culture</b>                           | <b>55.0%</b>                   | <b>55.8%</b> | <b>50.2%</b> | <b>54.4%</b> | <b>66.1%</b> | <b>64.5%</b>      | <b>51.2%</b>    |
| Historic site                            | 29.0%                          | 28.2%        | 25.0%        | 28.4%        | 34.0%        | 38.1%             | 23.9%           |
| Museum / art gallery                     | 12.2%                          | 21.8%        | 16.2%        | 22.7%        | 28.1%        | 19.7%             | 21.5%           |
| Polynesian show / luau                   | 23.7%                          | 24.7%        | 20.1%        | 24.4%        | 34.2%        | 31.1%             | 21.5%           |
| Art / craft fair                         | 2.3%                           | 5.2%         | 3.5%         | 4.0%         | 5.3%         | 3.4%              | 5.0%            |
| Festival                                 | 3.1%                           | 6.3%         | 7.3%         | 5.3%         | 5.8%         | 5.4%              | 6.5%            |
| <b>Transportation</b>                    | <b>99.2%</b>                   | <b>95.9%</b> | <b>95.3%</b> | <b>94.7%</b> | <b>90.0%</b> | <b>93.1%</b>      | <b>95.3%</b>    |
| Trolley                                  | 75.6%                          | 61.4%        | 69.8%        | 58.0%        | 48.9%        | 67.6%             | 57.8%           |
| Public Bus                               | 22.9%                          | 29.6%        | 29.1%        | 32.2%        | 33.7%        | 22.6%             | 33.9%           |
| Taxi / limousine                         | 60.3%                          | 50.9%        | 39.7%        | 45.6%        | 48.2%        | 44.9%             | 48.6%           |
| Rental car                               | 14.5%                          | 24.9%        | 18.7%        | 24.3%        | 16.9%        | 12.7%             | 25.5%           |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.

**TABLE 5.11 Activity Participation by Lifestage -- Canada**  
(% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |               |              |              | Visitation Status |                    |
|--|--------------------------------|--------------|---------------|--------------|--------------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family       | Young         | Middle Age   | Seniors      | First Timers      | Repeat<br>Visitors |
| <b>Sightseeing</b>                       | <b>94.7%</b>                   | <b>95.0%</b> | <b>96.9%</b>  | <b>93.9%</b> | <b>92.6%</b> | <b>97.4%</b>      | <b>91.9%</b>       |
| Helicopter / airplane tour               | 5.3%                           | 19.0%        | 14.5%         | 14.3%        | 13.4%        | 16.6%             | 12.4%              |
| Boat tour / submarine / whale watching   | 34.2%                          | 47.0%        | 31.6%         | 33.3%        | 23.1%        | 36.8%             | 26.8%              |
| Tour bus excursion                       | 10.5%                          | 19.0%        | 23.8%         | 29.0%        | 32.8%        | 40.8%             | 15.8%              |
| Private limousine / van tour             | 7.9%                           | 10.0%        | 8.8%          | 12.9%        | 10.4%        | 12.9%             | 8.9%               |
| Self-guided                              | 84.2%                          | 81.0%        | 90.7%         | 82.1%        | 71.2%        | 78.9%             | 81.9%              |
| <b>Recreation</b>                        | <b>94.7%</b>                   | <b>95.0%</b> | <b>100.0%</b> | <b>92.1%</b> | <b>87.6%</b> | <b>91.1%</b>      | <b>94.1%</b>       |
| Swimming / sunbathing / beach            | 86.8%                          | 91.0%        | 97.4%         | 89.2%        | 80.9%        | 87.6%             | 88.8%              |
| Surfing/body boarding                    | 31.6%                          | 52.0%        | 43.5%         | 19.4%        | 8.4%         | 24.5%             | 25.4%              |
| Snorkeling / scuba diving                | 57.9%                          | 67.0%        | 73.6%         | 46.2%        | 29.4%        | 52.9%             | 46.5%              |
| Jet skiing / parasailing / windsurfing   | 5.3%                           | 8.0%         | 3.6%          | 2.9%         | 2.7%         | 3.9%              | 3.4%               |
| Golf                                     | 23.7%                          | 17.0%        | 9.8%          | 14.3%        | 15.1%        | 10.8%             | 17.0%              |
| Running / jogging / fitness walking      | 34.2%                          | 41.0%        | 44.0%         | 41.6%        | 41.1%        | 36.6%             | 45.0%              |
| Gym / health spa                         | 13.2%                          | 12.0%        | 14.0%         | 14.7%        | 7.0%         | 8.2%              | 14.4%              |
| Backpacking / hiking / camping           | 18.4%                          | 23.0%        | 47.2%         | 21.5%        | 10.7%        | 29.7%             | 19.1%              |
| Sports event or tournament               | 13.2%                          | 5.0%         | 10.9%         | 6.8%         | 5.4%         | 6.6%              | 7.7%               |
| <b>Entertainment</b>                     | <b>92.1%</b>                   | <b>79.0%</b> | <b>87.0%</b>  | <b>80.6%</b> | <b>79.9%</b> | <b>86.3%</b>      | <b>78.7%</b>       |
| Lunch / sunset / dinner / evening cruise | 42.1%                          | 35.0%        | 40.9%         | 40.9%        | 41.8%        | 42.4%             | 39.1%              |
| Lounge act / stage show                  | 39.5%                          | 35.0%        | 39.4%         | 32.3%        | 37.5%        | 42.6%             | 31.2%              |
| Nightclub / dancing / bar / karaoke      | 31.6%                          | 8.0%         | 23.8%         | 18.6%        | 12.0%        | 16.6%             | 17.0%              |
| Fine dining                              | 89.5%                          | 56.0%        | 65.3%         | 61.6%        | 58.9%        | 62.9%             | 61.3%              |
| <b>Shopping</b>                          | <b>97.4%</b>                   | <b>98.0%</b> | <b>99.0%</b>  | <b>95.7%</b> | <b>96.3%</b> | <b>96.3%</b>      | <b>97.6%</b>       |
| Department stores                        | 76.3%                          | 64.0%        | 68.9%         | 61.3%        | 67.2%        | 64.7%             | 66.1%              |
| Designer boutiques                       | 47.4%                          | 46.0%        | 42.5%         | 50.5%        | 40.8%        | 45.3%             | 45.0%              |
| Hotel stores                             | 55.3%                          | 51.0%        | 53.4%         | 50.5%        | 44.8%        | 55.0%             | 44.2%              |
| Swap meet / flea markets                 | 44.7%                          | 41.0%        | 49.2%         | 41.6%        | 34.1%        | 43.4%             | 38.5%              |
| Discount / outlet stores                 | 42.1%                          | 50.0%        | 50.8%         | 42.3%        | 45.2%        | 39.7%             | 50.5%              |
| Supermarkets                             | 81.6%                          | 69.0%        | 72.0%         | 68.8%        | 68.9%        | 64.5%             | 75.3%              |
| Convenience stores                       | 76.3%                          | 74.0%        | 74.6%         | 64.9%        | 64.2%        | 67.4%             | 69.0%              |
| Duty free store                          | 18.4%                          | 14.0%        | 18.7%         | 17.2%        | 11.7%        | 18.4%             | 13.6%              |
| <b>Culture</b>                           | <b>68.4%</b>                   | <b>87.0%</b> | <b>82.4%</b>  | <b>77.8%</b> | <b>76.9%</b> | <b>88.2%</b>      | <b>72.4%</b>       |
| Historic site                            | 57.9%                          | 65.0%        | 64.2%         | 63.4%        | 57.9%        | 74.2%             | 52.3%              |
| Museum / art gallery                     | 34.2%                          | 32.0%        | 28.5%         | 35.5%        | 28.8%        | 31.8%             | 31.4%              |
| Polynesian show / luau                   | 42.1%                          | 68.0%        | 54.9%         | 45.2%        | 48.8%        | 65.5%             | 39.1%              |
| Art / craft fair                         | 15.8%                          | 20.0%        | 16.6%         | 21.5%        | 23.4%        | 17.4%             | 23.7%              |
| Festival                                 | 2.6%                           | 3.0%         | 9.3%          | 5.4%         | 6.7%         | 6.1%              | 5.7%               |
| <b>Transportation</b>                    | <b>92.1%</b>                   | <b>91.0%</b> | <b>90.7%</b>  | <b>95.0%</b> | <b>90.6%</b> | <b>89.2%</b>      | <b>94.7%</b>       |
| Trolley                                  | 5.3%                           | 7.0%         | 9.8%          | 15.1%        | 12.4%        | 14.2%             | 9.9%               |
| Public Bus                               | 15.8%                          | 23.0%        | 30.1%         | 27.2%        | 38.1%        | 31.6%             | 29.2%              |
| Taxi / limousine                         | 28.9%                          | 32.0%        | 35.8%         | 33.3%        | 24.4%        | 33.4%             | 29.2%              |
| Rental car                               | 86.8%                          | 78.0%        | 75.1%         | 72.0%        | 61.5%        | 67.6%             | 73.4%              |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.



**TABLE 5.12 Activity Participation by Lifestage -- Europe**  
(% of Visitors by Lifestyle / Lifestage Segment)

| Activity                                 | Lifestyle / Lifestage Segments |              |              |              |              | Visitation Status |                 |
|--|--------------------------------|--------------|--------------|--------------|--------------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family       | Young        | Middle Age   | Seniors      | First Timers      | Repeat Visitors |
| <b>Sightseeing</b>                       | <b>95.1%</b>                   | <b>97.5%</b> | <b>95.3%</b> | <b>96.6%</b> | <b>96.1%</b> | <b>96.5%</b>      | <b>95.5%</b>    |
| Helicopter / airplane tour               | 14.8%                          | 18.2%        | 17.9%        | 21.8%        | 17.9%        | 20.2%             | 16.8%           |
| Boat tour / submarine / whale watching   | 42.6%                          | 34.0%        | 34.9%        | 31.6%        | 25.7%        | 32.5%             | 28.3%           |
| Tour bus excursion                       | 29.5%                          | 26.4%        | 33.2%        | 41.3%        | 50.2%        | 46.7%             | 25.0%           |
| Private limousine / van tour             | 23.0%                          | 24.5%        | 13.5%        | 17.1%        | 17.9%        | 18.1%             | 14.7%           |
| Self-guided                              | 73.8%                          | 78.6%        | 78.9%        | 74.4%        | 61.8%        | 67.6%             | 84.3%           |
| <b>Recreation</b>                        | <b>98.4%</b>                   | <b>97.5%</b> | <b>96.3%</b> | <b>93.0%</b> | <b>82.8%</b> | <b>91.7%</b>      | <b>90.9%</b>    |
| Swimming / sunbathing / beach            | 98.4%                          | 96.9%        | 94.1%        | 90.5%        | 79.6%        | 89.4%             | 88.2%           |
| Surfing/body boarding                    | 27.9%                          | 37.1%        | 34.2%        | 13.1%        | 5.3%         | 19.2%             | 17.9%           |
| Snorkeling / scuba diving                | 52.5%                          | 54.1%        | 52.4%        | 36.1%        | 19.1%        | 37.2%             | 38.7%           |
| Jet skiing / parasailing / windsurfing   | 4.9%                           | 8.2%         | 5.9%         | 3.6%         | 0.9%         | 3.6%              | 4.8%            |
| Golf                                     | 6.6%                           | 10.1%        | 5.2%         | 9.5%         | 6.6%         | 5.9%              | 11.0%           |
| Running / jogging / fitness walking      | 23.0%                          | 23.3%        | 25.6%        | 24.8%        | 19.4%        | 20.7%             | 29.6%           |
| Gym / health spa                         | 8.2%                           | 7.5%         | 9.8%         | 9.5%         | 4.2%         | 7.6%              | 8.3%            |
| Backpacking / hiking / camping           | 24.6%                          | 17.0%        | 30.4%        | 18.1%        | 8.8%         | 18.3%             | 21.0%           |
| Sports event or tournament               | 3.3%                           | 6.9%         | 6.7%         | 5.9%         | 2.8%         | 4.5%              | 7.4%            |
| <b>Entertainment</b>                     | <b>83.6%</b>                   | <b>78.0%</b> | <b>86.0%</b> | <b>82.8%</b> | <b>76.8%</b> | <b>81.8%</b>      | <b>81.6%</b>    |
| Lunch / sunset / dinner / evening cruise | 52.5%                          | 44.7%        | 42.3%        | 42.6%        | 38.7%        | 43.7%             | 38.4%           |
| Lounge act / stage show                  | 27.9%                          | 29.6%        | 22.8%        | 30.9%        | 34.2%        | 31.5%             | 24.6%           |
| Nightclub / dancing / bar / karaoke      | 23.0%                          | 10.1%        | 45.5%        | 24.7%        | 12.1%        | 28.1%             | 20.2%           |
| Fine dining                              | 60.7%                          | 52.2%        | 61.0%        | 59.9%        | 51.1%        | 56.5%             | 59.0%           |
| <b>Shopping</b>                          | <b>100.0%</b>                  | <b>98.7%</b> | <b>97.6%</b> | <b>97.0%</b> | <b>96.6%</b> | <b>97.2%</b>      | <b>97.8%</b>    |
| Department stores                        | 67.2%                          | 79.2%        | 77.1%        | 75.6%        | 72.1%        | 74.6%             | 76.3%           |
| Designer boutiques                       | 52.5%                          | 49.1%        | 46.7%        | 42.1%        | 34.3%        | 43.5%             | 38.1%           |
| Hotel stores                             | 49.2%                          | 52.8%        | 46.4%        | 52.0%        | 55.8%        | 52.4%             | 49.4%           |
| Swap meet / flea markets                 | 31.1%                          | 30.8%        | 35.2%        | 32.4%        | 30.9%        | 31.7%             | 34.2%           |
| Discount / outlet stores                 | 45.9%                          | 47.2%        | 38.6%        | 39.5%        | 34.6%        | 34.9%             | 47.4%           |
| Supermarkets                             | 83.6%                          | 78.6%        | 75.0%        | 73.6%        | 69.7%        | 71.5%             | 79.4%           |
| Convenience stores                       | 60.7%                          | 51.6%        | 56.7%        | 55.4%        | 54.7%        | 56.5%             | 52.5%           |
| Duty free store                          | 16.4%                          | 26.4%        | 25.5%        | 18.3%        | 20.1%        | 22.5%             | 17.9%           |
| <b>Culture</b>                           | <b>88.5%</b>                   | <b>83.6%</b> | <b>81.8%</b> | <b>84.1%</b> | <b>84.5%</b> | <b>85.2%</b>      | <b>80.0%</b>    |
| Historic site                            | 65.6%                          | 69.8%        | 70.0%        | 69.5%        | 68.0%        | 70.6%             | 65.9%           |
| Museum / art gallery                     | 29.5%                          | 35.2%        | 31.5%        | 34.2%        | 32.1%        | 31.5%             | 35.5%           |
| Polynesian show / luau                   | 59.0%                          | 43.4%        | 40.0%        | 47.4%        | 52.5%        | 50.3%             | 39.7%           |
| Art / craft fair                         | 13.1%                          | 17.0%        | 14.8%        | 17.5%        | 18.0%        | 15.3%             | 20.5%           |
| Festival                                 | 6.6%                           | 5.7%         | 5.6%         | 9.1%         | 6.3%         | 5.7%              | 9.3%            |
| <b>Transportation</b>                    | <b>98.4%</b>                   | <b>94.3%</b> | <b>92.6%</b> | <b>94.1%</b> | <b>90.1%</b> | <b>92.2%</b>      | <b>94.2%</b>    |
| Trolley                                  | 21.3%                          | 14.5%        | 20.7%        | 20.7%        | 24.6%        | 22.6%             | 19.8%           |
| Public Bus                               | 39.3%                          | 27.7%        | 44.9%        | 37.7%        | 47.6%        | 42.4%             | 41.8%           |
| Taxi / limousine                         | 39.3%                          | 35.8%        | 40.3%        | 39.5%        | 34.5%        | 41.2%             | 30.7%           |
| Rental car                               | 73.8%                          | 70.4%        | 62.7%        | 55.4%        | 41.7%        | 50.3%             | 65.9%           |

Note: Percentages sum more than 100 percent due to multiple activities participated by visitors.

## 6. TRIP PLANNING

## TRIP PLANNING

### Trip Planning and Booking Timetable:

Similar to previous years, results from the 2003 survey continue to show a shorter planning and booking window for Japanese respondents compared to visitors from the U.S. West, U.S. East, Canada and Europe.

**U.S. West Visitors:** The decision to take a vacation/pleasure trip and the choice of Hawaii as the destination is made at about the same time as 2002 for U.S. West visitors. About 38 percent of the U.S. West respondents made the decision to choose Hawaii as a vacation destination seven months or more before their trip, 25.4 percent of the respondents took from 1 to 3 months to decide while 11.8 percent took less than one month to decide to visit the islands. Actual reservations and ticket purchases took place closer to the date of travel. More than half of the U.S. West visitors made their airline (62.2%) and lodging (57.7%) reservations and purchased their tickets (63.8%) within 3 months before their trips to Hawaii.

**U.S. East Visitors:** Close to 46 respondents from the U.S. East took seven months or more to make the decision to take a vacation/pleasure trip and to select Hawaii as the destination, 23.3 percent of the visitors took from 1 to 3 months while 7.5 percent took less than one month to decide on Hawaii. Nearly 53 percent made their airline reservations, 50.8 percent made their lodging reservations, 53.6 percent purchased their tickets within three months before coming to Hawaii.

**Japanese Visitors:** In contrast to their U.S. counterparts, over half of the Japanese respondents decided within 3 months or less to take vacation/pleasure trip (57.8%) and to come to Hawaii (63.5%). Over 86 percent made their airline, lodging and car reservations and purchased their tickets and tour packages within three months prior to their trip. Many of the remaining Japanese respondents took between 4 to 6 months to accomplish these tasks.

**Canadian Visitors:** Similar to U.S. West respondents, about 41 percent of the Canadian visitors surveyed took seven months or more to make the decision to take a vacation/pleasure trip and to select Hawaii as the destination, 25.4 percent took from 1 to 3 months while 9 percent took less than one month to decide on Hawaii. Over half of the Canadian respondents made their airline reservations, lodging reservations and purchased their tickets within 3 months of their departure date. The majority of the respondents made car reservations and purchasing tour packages three months or less before their trip.

**European Visitors:** About 34 percent of the European respondents took seven months or more to make the decision to take a vacation/pleasure trip and to pick Hawaii as the destination. Close to 32 percent of the visitors took 1 to 3 months while 11.8 percent took less than one month to decide on Hawaii. About 64.6 percent of the European respondents made their airline reservations, 64.3 percent made their lodging reservations,

67.1 percent purchased their tickets, 75.6 percent made car reservations and 88.8 percent purchased tour packages within three months before their departure date.

### **Island Visitation Decision Timetable:**

Most of the visitors surveyed in 2003 have already made a decision regarding which islands to visit before arriving in Hawaii. Oahu was the most visited island among the respondents, followed closely by Maui. About 25 to 50 percent of the respondents decided to visit Molokai and/or Lanai after arriving in Hawaii.

**U.S. West Visitors:** The majority of the U.S. West (94.1%) respondents have decided to visit the island of Oahu before their arrival to the State while only a small percentage (5.9%) chose Oahu after they are in Hawaii. Close to 93 percent selected the Maui, 89.7 percent chose Kauai, 89.5 percent chose the Big Island, 51.5 percent chose Lanai and 52.9 percent chose Molokai before coming to the state.

**U.S. East Visitors:** Similarly, nearly all of the U.S. East visitors surveyed selected the islands they would visit prior to their actual visit (Oahu (94.8%), Kauai (95%), Maui (93.9%), and the Big Island (89.4%)). About 50 percent of the respondents who visited Molokai and 40 percent of those who visited Lanai decided to do so after arriving in the islands.

**Japanese Visitors:** Nearly all (98%) of the Japanese respondents decided on Oahu before arriving to the state. Compared to their U.S. counterparts, a lower percentage of the Japanese visitors surveyed made up their minds about visiting Maui (85.8%), the Big Island (85.4%) and Kauai (69.1%) prior to their arrivals.

**Canadian Visitors:** Many of the Canadian visitors surveyed chose to visit Oahu (97.2%), Maui (94.2%), the Big Island (92.9%) and Kauai (91.9%) before arriving to the state.

**European Visitors:** The majority of the respondents decided to visit the islands before starting their trips. Almost 96 percent of Europeans decided to go to Oahu before coming to Hawaii, along with the 88.8 and 83.8 percent who decided to go to Maui and/or the Big Island before coming to Hawaii, respectively. For Molokai (40.6%) and Lanai (38.3%), some Europeans decided to go there after coming to the state.

### **Internet Use:**

The usage of the Internet as a trip-planning tool has climbed in popularity with U.S. visitors over the years. The majority of the Canadian and European visitors surveyed in 2003 also used the Internet for trip planning purposes. Although increasingly popular, Internet usage for trip planning among Japanese visitors is still lower compared to the other visitor groups.

**U.S. West Visitors:** Close to 91 percent the U.S. West visitors surveyed were Internet users and 59.8 percent used the Internet to plan their recent trip. The most common Internet searches by U.S. West respondents in trip planning were making airline reservations (58.8%), finding things to do (50.8%), estimating costs (48.5%), making rental car reservations

(42.8%), getting maps and directions (41.9%), selecting hotels (41.5%), finding recreational activities (38.1%), and making hotel reservations (38.1%).

**U.S. East Visitors:** Similarly, about 91 percent of the U.S. East survey respondents used the Internet and 63.7 percent used the Internet to plan their recent trip. The most popular topic in trip planning was to find things to do (56.8%), followed by searches for airline reservations (55.0%), hotel selection (46.6%), cost estimate (45.3%), recreational activities (42.9%) and maps and directions (42.0%).

**Japanese Visitors:** In contrast, 70.7 percent of the Japanese visitors surveyed were Internet users and only 40.8 percent used the Internet to plan their recent trip. The most popular searches were for information on Hawaii hotels (64.8%), followed by searches on shopping places (40.9%), restaurants reservations (37.9%), sightseeing places (37.5%) and finding things to do (33.4%).

**Canadian Visitors:** Nearly 85 percent of the Canadian visitors surveyed used the Internet and 61.6 percent planned their recent trip using the Internet. The most common searches for trip planning by this group were to find things to do (59.7%), followed by information on hotel selection (52.2%), estimate costs (49.2%), airline reservations (42.3%), maps and directions (42.2%), recreation activities (40.6%) and locate sightseeing places (38.5%).

**European Visitors:** Close to 80 percent of the European respondents were Internet users and 58.2 percent used the Internet to plan their recent trip. Similar to U.S. East and Canadian respondents the most popular searches by European visitors in their trip planning were to find things to do (55.0%), followed by searches for hotel selections (52.6%), maps and directions (44.6%), sightseeing places (42.0%), cost estimate (41.2%), hotel reservations (35.8%), airline reservations (28.9%) and recreation activities (28.7%).

**TABLE 6.1 Trip Planning & Booking Timetable: U.S. Total**  
(% of U.S. Total Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 8.7%                  | 24.1%     | 26.2%     | 12.7%     | 14.4%       | 13.9%    |
| Decide to visit Hawaii                  | 9.7%                  | 24.4%     | 24.1%     | 12.7%     | 12.9%       | 16.2%    |
| Decide on which islands to visit        | 12.9%                 | 27.7%     | 24.9%     | 12.8%     | 11.5%       | 10.1%    |
| Set date for the trip                   | 13.3%                 | 31.6%     | 26.7%     | 12.3%     | 9.7%        | 6.3%     |
| Airline reservations                    | 17.4%                 | 40.1%     | 24.8%     | 10.6%     | 5.6%        | 1.5%     |
| Purchase tickets                        | 17.9%                 | 41.0%     | 24.2%     | 10.4%     | 5.1%        | 1.4%     |
| Accommodation reservations              | 16.0%                 | 38.3%     | 24.3%     | 10.6%     | 6.9%        | 3.9%     |
| Rental car reservations                 | 30.3%                 | 39.8%     | 19.3%     | 6.7%      | 2.9%        | 1.0%     |
| Purchase tour or attraction packages    | 66.3%                 | 18.6%     | 9.1%      | 3.4%      | 1.4%        | 1.3%     |

**TABLE 6.2 Trip Planning & Booking Timetable: U.S. West**  
(% of U.S. West Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 10.2%                 | 26.1%     | 27.0%     | 10.2%     | 14.4%       | 12.1%    |
| Decide to visit Hawaii                  | 11.8%                 | 25.4%     | 24.5%     | 10.7%     | 12.1%       | 15.6%    |
| Decide on which islands to visit        | 14.0%                 | 28.9%     | 24.4%     | 10.7%     | 11.4%       | 10.6%    |
| Set date for the trip                   | 15.4%                 | 33.6%     | 26.6%     | 10.7%     | 8.5%        | 5.1%     |
| Airline reservations                    | 19.1%                 | 43.1%     | 23.8%     | 8.6%      | 4.4%        | 1.0%     |
| Purchase tickets                        | 19.2%                 | 44.6%     | 22.8%     | 8.5%      | 4.0%        | 0.8%     |
| Accommodation reservations              | 17.9%                 | 39.8%     | 22.3%     | 9.2%      | 6.6%        | 4.2%     |
| Rental car reservations                 | 30.4%                 | 41.9%     | 17.7%     | 6.2%      | 2.8%        | 1.1%     |
| Purchase tour or attraction packages    | 65.6%                 | 19.7%     | 9.4%      | 2.7%      | 1.3%        | 1.3%     |

**TABLE 6.3 Trip Planning & Booking Timetable: U.S. East**  
(% of U.S. East Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 7.1%                  | 22.0%     | 25.4%     | 15.4%     | 14.4%       | 15.8%    |
| Decide to visit Hawaii                  | 7.5%                  | 23.3%     | 23.8%     | 14.9%     | 13.8%       | 16.7%    |
| Decide on which islands to visit        | 11.7%                 | 26.6%     | 25.4%     | 15.1%     | 11.7%       | 9.6%     |
| Set date for the trip                   | 11.1%                 | 29.5%     | 26.9%     | 14.0%     | 10.9%       | 7.5%     |
| Airline reservations                    | 15.7%                 | 36.9%     | 25.9%     | 12.8%     | 6.8%        | 2.0%     |
| Purchase tickets                        | 16.4%                 | 37.2%     | 25.6%     | 12.5%     | 6.3%        | 1.9%     |
| Accommodation reservations              | 14.1%                 | 36.7%     | 26.4%     | 12.0%     | 7.3%        | 3.6%     |
| Rental car reservations                 | 30.1%                 | 37.5%     | 21.0%     | 7.2%      | 3.1%        | 1.0%     |
| Purchase tour or attraction packages    | 66.9%                 | 17.6%     | 8.9%      | 3.9%      | 1.4%        | 1.3%     |

**TABLE 6.4 Trip Planning & Booking Timetable: Japan**  
(% of Japanese Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 13.5%                 | 44.3%     | 24.0%     | 5.5%      | 4.3%        | 8.3%     |
| Decide to visit Hawaii                  | 16.7%                 | 46.8%     | 20.4%     | 4.1%      | 4.0%        | 8.0%     |
| Decide on which islands to visit        | 22.1%                 | 47.3%     | 17.8%     | 3.8%      | 3.5%        | 5.6%     |
| Set date for the trip                   | 24.6%                 | 53.6%     | 15.0%     | 3.0%      | 2.1%        | 1.8%     |
| Airline reservations                    | 29.3%                 | 58.0%     | 9.8%      | 1.6%      | 0.9%        | 0.5%     |
| Purchase tickets                        | 35.3%                 | 54.3%     | 8.3%      | 1.0%      | 0.5%        | 0.5%     |
| Accommodation reservations              | 30.1%                 | 56.5%     | 10.2%     | 1.4%      | 1.1%        | 0.8%     |
| Rental car reservations                 | 60.6%                 | 31.3%     | 6.4%      | 0.5%      | 0.4%        | 0.8%     |
| Purchase tour or attraction packages    | 74.4%                 | 22.2%     | 2.8%      | 0.3%      | 0.1%        | 0.2%     |

**TABLE 6.5 Trip Planning & Booking Timetable: Canada**  
(% of Canadian Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 7.2%                  | 25.9%     | 25.4%     | 11.9%     | 14.8%       | 14.7%    |
| Decide to visit Hawaii                  | 9.0%                  | 25.4%     | 24.9%     | 11.8%     | 13.5%       | 15.5%    |
| Decide on which islands to visit        | 11.9%                 | 29.5%     | 24.5%     | 11.5%     | 12.8%       | 9.8%     |
| Set date for the trip                   | 12.1%                 | 32.4%     | 27.7%     | 11.6%     | 10.3%       | 5.9%     |
| Airline reservations                    | 15.6%                 | 41.3%     | 27.6%     | 10.0%     | 4.6%        | 1.0%     |
| Purchase tickets                        | 16.8%                 | 42.9%     | 26.0%     | 9.2%      | 4.2%        | 0.9%     |
| Accommodation reservations              | 16.9%                 | 40.3%     | 22.1%     | 8.7%      | 7.7%        | 4.4%     |
| Rental car reservations                 | 43.4%                 | 35.2%     | 12.6%     | 5.4%      | 2.0%        | 1.4%     |
| Purchase tour or attraction packages    | 73.4%                 | 13.9%     | 6.6%      | 2.8%      | 1.6%        | 1.6%     |

**TABLE 6.6 Trip Planning & Booking Timetable: Europe**  
(% of European Visitors)

| Planning                                | Time before departure |           |           |           |             |          |
|---|-----------------------|-----------|-----------|-----------|-------------|----------|
|   | < 1 Month             | 1 - 3 mos | 4 - 6 mos | 7 - 9 mos | 10 - 12 mos | > 12 mos |
| Decide to take vacation / pleasure trip | 9.9%                  | 30.5%     | 25.1%     | 10.7%     | 11.0%       | 12.7%    |
| Decide to visit Hawaii                  | 11.8%                 | 31.7%     | 23.1%     | 10.1%     | 10.0%       | 13.3%    |
| Decide on which islands to visit        | 16.2%                 | 34.0%     | 22.5%     | 9.9%      | 9.0%        | 8.5%     |
| Set date for the trip                   | 16.5%                 | 38.2%     | 22.7%     | 9.8%      | 7.7%        | 5.2%     |
| Airline reservations                    | 20.3%                 | 44.3%     | 20.6%     | 8.5%      | 4.7%        | 1.5%     |
| Purchase tickets                        | 23.3%                 | 43.8%     | 19.3%     | 7.9%      | 4.3%        | 1.5%     |
| Accommodation reservations              | 21.6%                 | 42.7%     | 19.3%     | 7.9%      | 5.5%        | 2.9%     |
| Rental car reservations                 | 40.8%                 | 34.8%     | 15.5%     | 5.3%      | 2.3%        | 1.3%     |
| Purchase tour or attraction packages    | 71.3%                 | 17.5%     | 6.8%      | 2.3%      | 1.1%        | 1.0%     |

**TABLE 6.7 Island Visitation Decision Timetable  
(% of Total Visitors by MMA)**

| Time of Decision                | Total U.S. | U.S. West | U.S. East | Japan | Canada | Europe |
|---------------------------------|------------|-----------|-----------|-------|--------|--------|
| <b>Oahu</b>                     |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 94.5%      | 94.1%     | 94.8%     | 98.0% | 97.2%  | 95.5%  |
| Decide after arrival in Hawaii  | 5.5%       | 5.9%      | 5.2%      | 2.0%  | 2.8%   | 4.5%   |
| <b>Maui</b>                     |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 93.4%      | 92.9%     | 93.9%     | 85.8% | 94.2%  | 88.8%  |
| Decide after arrival in Hawaii  | 6.6%       | 7.1%      | 6.1%      | 14.2% | 5.8%   | 11.2%  |
| <b>Molokai</b>                  |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 51.5%      | 52.9%     | 50.0%     | 57.6% | 75.0%  | 59.4%  |
| Decide after arrival in Hawaii  | 48.5%      | 47.1%     | 50.0%     | 42.4% | 25.0%  | 40.6%  |
| <b>Lanai</b>                    |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 56.8%      | 51.5%     | 60.0%     | 70.0% | 66.7%  | 61.7%  |
| Decide after arrival in Hawaii  | 43.2%      | 48.5%     | 40.0%     | 30.0% | 33.3%  | 38.3%  |
| <b>Big Island</b>               |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 89.4%      | 89.5%     | 89.4%     | 85.4% | 92.9%  | 83.8%  |
| Decide after arrival in Hawaii  | 10.6%      | 10.5%     | 10.6%     | 14.6% | 7.1%   | 16.2%  |
| <b>Kauai</b>                    |            |           |           |       |        |        |
| Decide before arrival in Hawaii | 92.5%      | 89.7%     | 95.0%     | 69.1% | 91.9%  | 82.6%  |
| Decide after arrival in Hawaii  | 7.5%       | 10.3%     | 5.0%      | 30.9% | 8.1%   | 17.4%  |

**TABLE 6.8 Sources of Information Used for Trip Planning  
(% of Total Visitors by MMA)**

| Information Source                  | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|-------------------------------------|------------|-----------|-----------|-------|--------|--------|
| Travel agents                       | 37.3%      | 36.4%     | 38.3%     | 62.4% | 47.7%  | 55.9%  |
| Internet                            | 61.7%      | 59.8%     | 63.7%     | 40.8% | 61.6%  | 58.2%  |
| Personal experience                 | 47.1%      | 52.2%     | 41.7%     | 46.7% | 40.7%  | 26.6%  |
| Wholesalers                         | 11.7%      | 12.3%     | 11.1%     | 16.9% | 11.0%  | 19.0%  |
| Friends / relatives                 | 42.4%      | 39.5%     | 45.5%     | 27.9% | 38.3%  | 33.2%  |
| Magazines                           | 13.2%      | 10.9%     | 15.5%     | 42.1% | 13.5%  | 13.4%  |
| Books                               | 20.9%      | 17.1%     | 24.8%     | 38.0% | 21.9%  | 36.4%  |
| Hotels / resorts                    | 23.9%      | 21.8%     | 26.2%     | 8.1%  | 20.6%  | 15.0%  |
| Airlines                            | 28.2%      | 27.8%     | 28.5%     | 9.6%  | 24.9%  | 17.7%  |
| Hawaii Visitors & Convention Bureau | 12.3%      | 9.4%      | 15.4%     | 9.2%  | 11.0%  | 9.9%   |
| Newspapers                          | 4.7%       | 5.3%      | 4.2%      | 4.0%  | 4.9%   | 5.4%   |

Note: Percentage sum more than 100 percent due to multiple reasons selected.



**TABLE 6.9 Internet Usage for Trip Planning and Booking  
(% of Total Visitors by MMA)**

| Purpose                      | Total U.S. | U.S. West | U.S. East | Japan | Canada | Europe |
|------------------------------|------------|-----------|-----------|-------|--------|--------|
| Find things to do            | 53.7%      | 50.8%     | 56.8%     | 33.4% | 59.7%  | 55.0%  |
| Estimate costs               | 47.0%      | 48.5%     | 45.3%     | 13.0% | 49.2%  | 41.2%  |
| Hotel selection              | 44.0%      | 41.5%     | 46.6%     | 64.8% | 52.2%  | 52.6%  |
| Make restaurant reservations | 26.5%      | 24.4%     | 28.7%     | 37.9% | 21.9%  | 19.1%  |
| Find recreational activities | 40.4%      | 38.1%     | 42.9%     | 33.2% | 40.6%  | 28.7%  |
| Maps and directions          | 42.0%      | 41.9%     | 42.0%     | 27.1% | 42.2%  | 44.6%  |
| Locate sightseeing places    | 32.7%      | 26.9%     | 38.8%     | 37.5% | 38.5%  | 42.0%  |
| Make airline reservations    | 56.9%      | 58.8%     | 55.0%     | 16.9% | 42.3%  | 28.9%  |
| Hotel Reservation            | 40.2%      | 38.1%     | 42.4%     | 20.9% | 35.9%  | 35.8%  |
| Rental Car Reservation       | 42.0%      | 42.8%     | 41.1%     | 11.0% | 33.9%  | 22.3%  |
| Locate shopping places       | 10.5%      | 10.3%     | 10.8%     | 40.9% | 14.3%  | 12.3%  |
| Find evening activities      | 16.2%      | 15.1%     | 17.5%     | 7.7%  | 13.7%  | 12.0%  |

Note: Percentage sum more than 100 percent due to multiple reasons selected.

**TABLE 6.10 Internet Users by MMA  
(% of Total Visitors by MMA)**

| Internet usage      | Total U.S. | U.S. West | U.S. East | Japan | Canada | Europe |
|---------------------|------------|-----------|-----------|-------|--------|--------|
| Used internet       | 90.9%      | 91.1%     | 90.6%     | 70.7% | 84.8%  | 80.1%  |
| Never used internet | 9.1%       | 8.9%      | 9.4%      | 29.3% | 15.2%  | 19.9%  |

**TABLE 6.11 Usage of Travel Agent by MMA  
(% of Total Visitors by MMA)**

| Travel agent usage                | Total U.S. | U.S. West | U.S. East | Japan | Canada | Europe |
|-----------------------------------|------------|-----------|-----------|-------|--------|--------|
| Help in deciding travel to Hawaii | 10.1%      | 8.6%      | 11.7%     | 6.7%  | 12.5%  | 16.3%  |
| Help in choosing the airline      | 45.5%      | 43.3%     | 47.8%     | 26.3% | 54.1%  | 49.7%  |
| Help in planning activities       | 16.3%      | 12.0%     | 20.8%     | 34.2% | 16.6%  | 12.6%  |
| Make airline reservations         | 76.3%      | 80.3%     | 72.2%     | 78.5% | 79.2%  | 85.5%  |
| Make hotel arrangements           | 61.8%      | 59.3%     | 64.4%     | 78.2% | 53.3%  | 65.7%  |
| Make rental car reservations      | 52.8%      | 57.4%     | 48.0%     | 7.8%  | 32.5%  | 27.9%  |
| Help in purchasing tour packages  | 18.2%      | 15.0%     | 21.5%     | 34.3% | 14.4%  | 11.5%  |

Note: Percentage sum more than 100 percent due to multiple reasons selected.

## 7. SAFETY ISSUES AND OTHER NUISANCE



## 7. SAFETY ISSUES AND OTHER NUISANCE

The 2003 survey asked U.S., Japanese, Canadian and European visitors about safety and other nuisance issues they encountered during their recent trips to the islands. Results show that mostly all of the U.S. West (90.4%), U.S. East (92.8%), Japanese (94.7%), Canadian (91.3%) and European (91.8%) visitors surveyed experienced no problems while on the islands.

Of the small number of visitors who reported problems, being solicited by drug dealers was the issue most mentioned by U.S., Canadian and European. The second most mentioned safety issue by U.S., Canadians and European visitors was having being solicited by prostitutes.

The biggest issue among Japanese respondents in 2003 was having their wallet/purse/valuables stolen, reported by 1.4 percent of the respondents.

Figure 26: Percentage of Visitors Who Encountered Safety Issues: U.S. Visitors

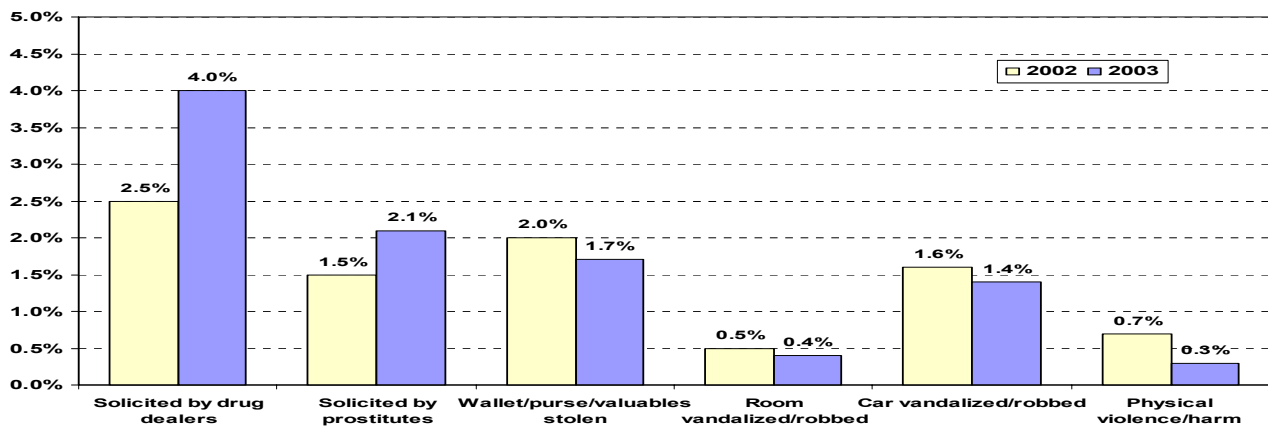


Figure 27: Percentage of Visitors Who Encountered Safety Issues: Japanese Visitors

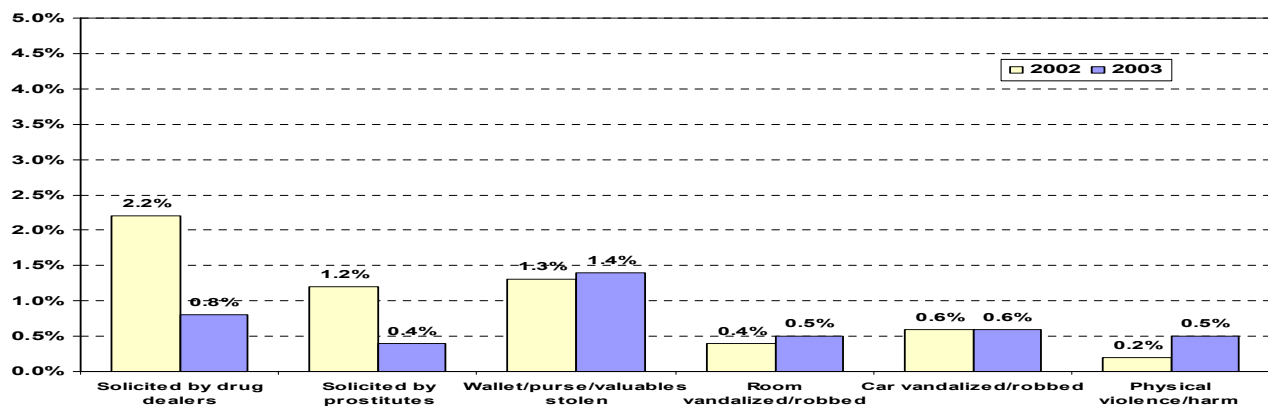


Figure 28: Percentage of Visitors Who Encountered Safety Issues: Canadian Visitors

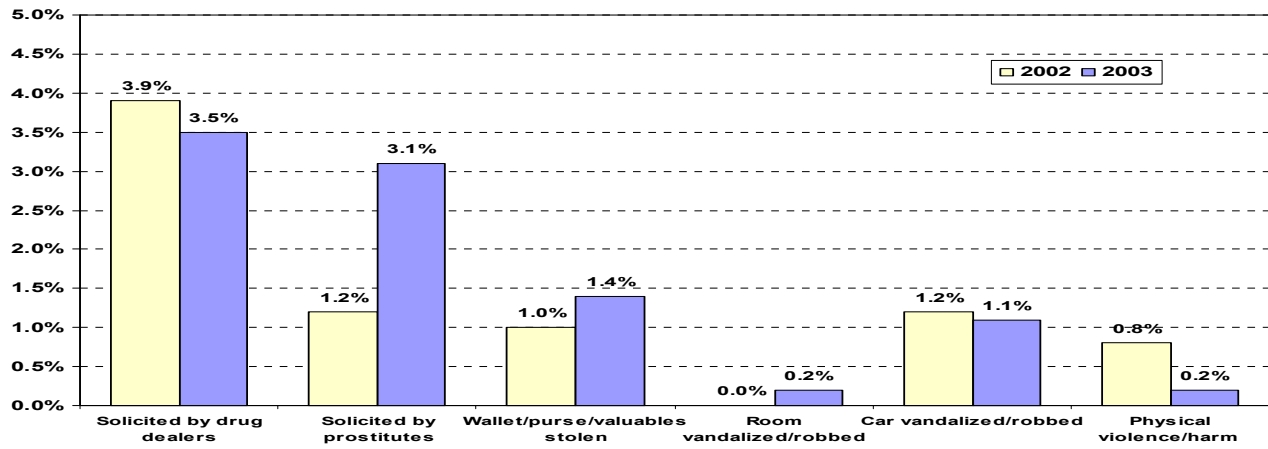
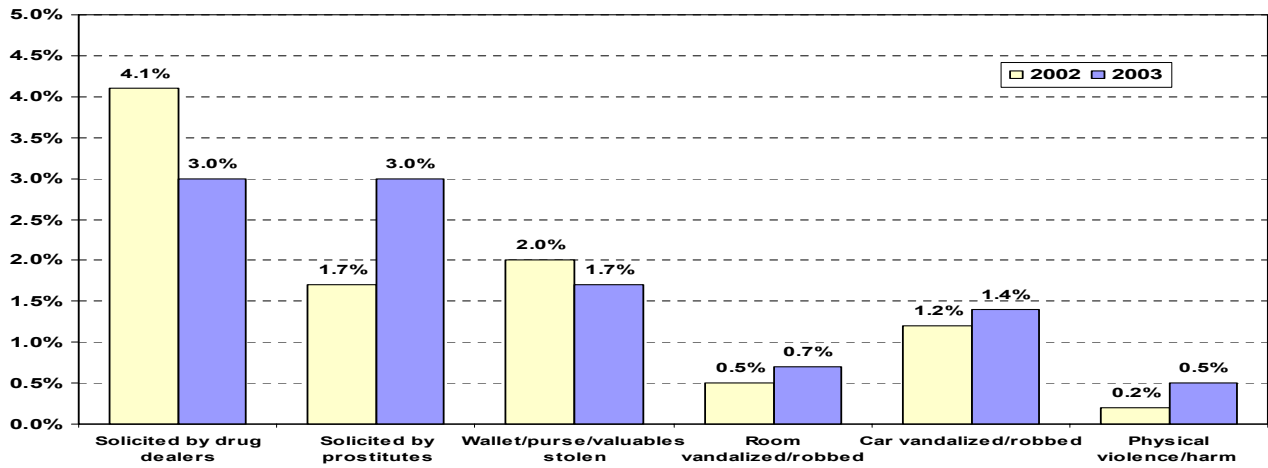


Figure 29: Percentage of Visitors Who Encountered Safety Issues: European Visitors



**TABLE 7.1 Safety Issues and Other Nuisance  
(% of Total Visitors by MMA)**

|                                   | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|-----------------------------------|------------|-----------|-----------|-------|--------|--------|
| No problems                       | 91.6%      | 90.4%     | 92.8%     | 94.7% | 91.3%  | 91.8%  |
| Safety Issues:                    |            |           |           |       |        |        |
| Solicited by drug dealers         | 4.0%       | 4.4%      | 3.7%      | 0.8%  | 3.5%   | 3.0%   |
| Solicited by prostitutes          | 2.1%       | 2.6%      | 1.7%      | 0.4%  | 3.1%   | 3.0%   |
| Wallet / purse / valuables stolen | 1.7%       | 2.3%      | 1.1%      | 1.4%  | 1.4%   | 1.7%   |
| Room vandalized / robbed          | 0.4%       | 0.5%      | 0.3%      | 0.5%  | 0.2%   | 0.7%   |
| Car vandalized / robbed           | 1.4%       | 2.0%      | 0.9%      | 0.6%  | 1.1%   | 1.4%   |
| Physical violence / harm          | 0.3%       | 0.2%      | 0.4%      | 0.5%  | 0.2%   | 0.5%   |
| Other Nuisance:                   |            |           |           |       |        |        |
| Parking ticket                    | 2.0%       | 2.0%      | 1.9%      | 2.6%  | 1.4%   | 1.0%   |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.2 Safety Issues and Other Nuisance - U.S. Total  
(% of Visitors by Lifestyle / Lifestage Segment)**

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|                                   | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| No problems                       | 87.3%                          | 92.2%  | 84.5% | 91.5%      | 96.9%   | 91.0%             | 92.0%              |
| Safety Issues:                    |                                |        |       |            |         |                   |                    |
| Solicited by drug dealers         | 2.8%                           | 3.8%   | 7.6%  | 4.8%       | 0.7%    | 4.6%              | 3.7%               |
| Solicited by prostitutes          | 1.4%                           | 2.0%   | 4.1%  | 2.2%       | 0.9%    | 2.3%              | 1.9%               |
| Wallet / purse / valuables stolen | 2.8%                           | 1.5%   | 3.3%  | 1.7%       | 0.4%    | 1.5%              | 1.8%               |
| Room vandalized / robbed          | 0.0%                           | 0.5%   | 0.8%  | 0.5%       | 0.1%    | 0.2%              | 0.5%               |
| Car vandalized / robbed           | 8.5%                           | 0.5%   | 2.3%  | 1.3%       | 0.6%    | 0.8%              | 1.6%               |
| Physical violence / harm          | 0.0%                           | 0.0%   | 0.6%  | 0.5%       | 0.1%    | 0.4%              | 0.3%               |
| Other Nuisance:                   |                                |        |       |            |         |                   |                    |
| Parking ticket                    | 4.2%                           | 1.3%   | 3.1%  | 1.8%       | 1.6%    | 2.3%              | 1.8%               |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.3 Safety Issues and Other Nuisance - U.S. West**  
 (% of Visitors by Lifestyle / Lifestage Segment)

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |        |                    |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------|--------------------|
|                                   | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First             | Timers | Repeat<br>Visitors |
| No problems                       | 87.2%                          | 89.1%  | 85.3% | 89.5%      | 96.5%   | 89.3%             |        | 90.7%              |
| Safety Issues:                    |                                |        |       |            |         |                   |        |                    |
| Solicited by drug dealers         | 2.6%                           | 5.3%   | 7.8%  | 4.9%       | 1.3%    | 5.3%              |        | 4.2%               |
| Solicited by prostitutes          | 0.0%                           | 3.2%   | 4.6%  | 2.8%       | 0.9%    | 3.6%              |        | 2.1%               |
| Wallet / purse / valuables stolen | 5.1%                           | 1.2%   | 3.2%  | 2.8%       | 0.9%    | 1.8%              |        | 2.3%               |
| Room vandalized / robbed          | 0.0%                           | 0.8%   | 0.9%  | 0.5%       | 0.3%    | 0.7%              |        | 0.5%               |
| Car vandalized / robbed           | 12.8%                          | 0.8%   | 2.3%  | 2.1%       | 0.6%    | 1.1%              |        | 2.1%               |
| Physical violence / harm          | 0.0%                           | 0.0%   | 0.0%  | 0.5%       | 0.3%    | 0.0%              |        | 0.3%               |
| Other Nuisance:                   |                                |        |       |            |         |                   |        |                    |
| Parking ticket                    | 2.6%                           | 1.6%   | 1.8%  | 2.3%       | 1.9%    | 2.8%              |        | 1.7%               |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.4 Safety Issues and Other Nuisance - U.S. East**  
 (% of Visitors by Lifestyle / Lifestage Segment)

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |        |                    |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------|--------------------|
|                                   | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First             | Timers | Repeat<br>Visitors |
| No problems                       | 87.5%                          | 97.3%  | 83.8% | 93.6%      | 97.2%   | 91.9%             |        | 93.8%              |
| Safety Issues:                    |                                |        |       |            |         |                   |        |                    |
| Solicited by drug dealers         | 3.1%                           | 1.4%   | 7.5%  | 4.7%       | 0.3%    | 4.2%              |        | 3.0%               |
| Solicited by prostitutes          | 3.1%                           | 0.0%   | 3.8%  | 1.5%       | 0.9%    | 1.7%              |        | 1.6%               |
| Wallet / purse / valuables stolen | 0.0%                           | 2.0%   | 3.4%  | 0.5%       | 0.0%    | 1.3%              |        | 0.9%               |
| Room vandalized / robbed          | 0.0%                           | 0.0%   | 0.8%  | 0.5%       | 0.0%    | 0.0%              |        | 0.4%               |
| Car vandalized / robbed           | 3.1%                           | 0.0%   | 2.3%  | 0.5%       | 0.6%    | 0.7%              |        | 0.9%               |
| Physical violence / harm          | 0.0%                           | 0.0%   | 1.1%  | 0.5%       | 0.0%    | 0.6%              |        | 0.3%               |
| Other Nuisance:                   |                                |        |       |            |         |                   |        |                    |
| Parking ticket                    | 6.3%                           | 0.7%   | 4.1%  | 1.2%       | 1.4%    | 2.0%              |        | 1.8%               |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.5 Safety Issues and Other Nuisance - Japan**  
 (% of Visitors by Lifestyle / Lifestage Segment)

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |        |                    |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------|--------------------|
|                                   | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First             | Timers | Repeat<br>Visitors |
| No problems                       | 98.3%                          | 95.9%  | 93.0% | 92.7%      | 96.6%   | 95.0%             |        | 94.5%              |
| Safety Issues:                    |                                |        |       |            |         |                   |        |                    |
| Solicited by drug dealers         | 0.0%                           | 0.5%   | 0.9%  | 1.2%       | 1.0%    | 0.8%              |        | 0.6%               |
| Solicited by prostitutes          | 0.0%                           | 0.7%   | 0.3%  | 0.5%       | 0.2%    | 0.3%              |        | 0.4%               |
| Wallet / purse / valuables stolen | 0.0%                           | 1.2%   | 1.4%  | 1.4%       | 2.1%    | 1.3%              |        | 1.6%               |
| Room vandalized / robbed          | 0.0%                           | 0.5%   | 0.3%  | 0.3%       | 0.8%    | 0.7%              |        | 0.3%               |
| Car vandalized / robbed           | 0.0%                           | 0.5%   | 0.5%  | 1.4%       | 0.3%    | 0.3%              |        | 0.7%               |
| Physical violence / harm          | 0.0%                           | 0.8%   | 0.5%  | 0.6%       | 0.2%    | 0.1%              |        | 0.7%               |
| Other Nuisance:                   |                                |        |       |            |         |                   |        |                    |
| Parking ticket                    | 2.6%                           | 2.0%   | 4.4%  | 3.5%       | 0.8%    | 2.4%              |        | 2.5%               |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.6 Safety Issues and Other Nuisance - Canada**  
(% of Visitors by Lifestyle / Lifestage Segment)

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |        |                 |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------|-----------------|
|                                   | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First             | Timers | Repeat Visitors |
| No problems                       | 86.1%                          | 92.5%  | 84.8% | 90.9%      | 96.2%   | 91.2%             |        | 91.2%           |
| Safety Issues:                    |                                |        |       |            |         |                   |        |                 |
| Solicited by drug dealers         | 8.3%                           | 1.1%   | 8.4%  | 4.2%       | 0.0%    | 4.0%              |        | 3.4%            |
| Solicited by prostitutes          | 5.6%                           | 2.2%   | 3.9%  | 3.4%       | 1.7%    | 2.9%              |        | 3.4%            |
| Wallet / purse / valuables stolen | 0.0%                           | 1.1%   | 2.2%  | 2.3%       | 0.3%    | 1.1%              |        | 1.3%            |
| Room vandalized / robbed          | 0.0%                           | 0.0%   | 0.0%  | 0.4%       | 0.3%    | 0.3%              |        | 0.2%            |
| Car vandalized / robbed           | 2.8%                           | 1.1%   | 1.1%  | 1.5%       | 0.7%    | 0.8%              |        | 1.5%            |
| Physical violence / harm          | 0.0%                           | 0.0%   | 0.0%  | 0.4%       | 0.3%    | 0.0%              |        | 0.4%            |
| Other Nuisance:                   |                                |        |       |            |         |                   |        |                 |
| Parking ticket                    | 0.0%                           | 2.8%   | 1.1%  | 1.4%       | 0.3%    | 0.9%              |        | 1.2%            |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 7.7 Safety Issues and Other Nuisance - Europe**  
(% of Visitors by Lifestyle / Lifestage Segment)

|                                   | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |        |                 |
|-----------------------------------|--------------------------------|--------|-------|------------|---------|-------------------|--------|-----------------|
|                                   | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First             | Timers | Repeat Visitors |
| No problems                       | 91.1%                          | 94.4%  | 85.8% | 91.7%      | 96.6%   | 92.5%             |        | 90.7%           |
| Safety Issues:                    |                                |        |       |            |         |                   |        |                 |
| Solicited by drug dealers         | 1.8%                           | 1.4%   | 7.2%  | 2.0%       | 0.8%    | 2.7%              |        | 3.2%            |
| Solicited by prostitutes          | 0.0%                           | 0.7%   | 5.2%  | 3.1%       | 2.0%    | 3.0%              |        | 2.7%            |
| Wallet / purse / valuables stolen | 1.8%                           | 0.7%   | 2.7%  | 1.9%       | 1.0%    | 1.6%              |        | 2.2%            |
| Room vandalized / robbed          | 0.0%                           | 0.7%   | 1.4%  | 0.6%       | 0.3%    | 0.7%              |        | 0.7%            |
| Car vandalized / robbed           | 7.1%                           | 1.4%   | 1.6%  | 1.4%       | 0.7%    | 1.0%              |        | 2.4%            |
| Physical violence / harm          | 0.0%                           | 0.0%   | 1.3%  | 0.3%       | 0.3%    | 0.7%              |        | 0.3%            |
| Other Nuisance:                   |                                |        |       |            |         |                   |        |                 |
| Parking ticket                    | 0.0%                           | 2.8%   | 1.1%  | 1.4%       | 0.3%    | 0.9%              |        | 1.2%            |

Note: Percentages sum more than 100 percent due to multiple answers selected.

## 8. VISITOR PROFILE



## 8. VISITORS PROFILE

### Primary Purpose of Trips:

**U.S. Visitors:** The majority of the U.S. West (66.3%), U.S. East visitors (61.9%) surveyed in 2003 listed vacation as the primary reason for coming to the islands. Other primary reasons for U.S. respondents to visit Hawaii were to visit friends/relatives, to attend business meetings/conduct business to attend a convention/conference/seminar, to attend/participate in a cultural event and to get married.

**Japanese Visitors:** Vacation was the primary reason for 66.8 percent of the Japanese respondents to be in Hawaii. For Japanese respondents, other primary reasons for visiting Hawaii was to attend/participate in weddings (9%), to honeymoon (7.7%), to get married (2.9%) to attend/participate in a sporting event (2.6%) and to visit friends/relatives (2.4%).

**Canadian Visitors:** Nearly 75 percent of the Canadian respondents indicated that vacation was their main reason for coming to the islands. About 5 percent attended a convention/conference/seminar, 3.6 percent got married, 3.4 percent visited friends/relatives, and 2.8 percent attend/participate in a cultural event.

**European Visitors:** Vacation was also the primary reason for 70.7 percent of the European respondents to be in Hawaii. Close to 6 percent visited friends/relatives, 3.8 percent attended a convention/conference/seminar, 3.3 percent attended/participated in a cultural event, 2.5 percent attended a business meeting/conducted business and 2.1 percent got married.

### Secondary Purpose of Trips:

**U.S. Visitors:** About 51.6 percent of U.S. West and 54.8 percent of U.S. East surveyed in 2003 listed vacation as their secondary purpose of trip. Other secondary reasons to come to Hawaii were to visit friends/relatives (27.5% U.S. West, 22.2% U.S. East), to attend business meetings/conduct business (8.2% U.S. West and 8.4% U.S. East) and to honeymoon (2.6% U.S. West, 3.8% U.S. East).

**Japanese Visitors:** Vacation was also the main secondary purpose of trip among 43.9 percent of the Japanese respondents. In addition, 13.1 percent came to attend/participate in a wedding, 11.0 percent visited friends/relatives, 9.3 percent came to honeymoon and 7.7 percent attended/participated in a sporting event.

**Canadian Visitors:** Close to 52 percent of the Canadian respondents indicated that vacation was their secondary purpose for coming to Hawaii. Other secondary reasons were to visit friends/relatives (20.2%), to attend a business meeting/conduct business (6.6%) and to honeymoon (5.7%).

**European Visitors:** Similarly, vacation was the secondary purpose of trip for 57.1 percent of the European visitors surveyed. In addition, 19.0 percent visited friends/relatives, 5.3 percent came to honeymoon, 4.5 percent attended/participated in a sporting event and 4.5 percent attended participated in a cultural event.

### **Travel Companions:**

**U.S. Visitors:** The majority of the U.S. West and U.S. East respondents in 2003 traveled to the islands with their spouses (46.6% and 54.4%), with children (20.1% and 12.6%) and with other family members (19.2% and 22.4%). Additionally, 20.3 percent of U.S. West and 19.3 percent of U.S. East visitors came with friends/business associates while 13.5 percent of U.S. West and 11.7 percent of U.S. East visitors came alone.

**Japanese Visitors:** About 48 percent of the Japanese visitors surveyed came with their spouses, 32.1 percent were with children, and 14.0 percent were with other family members. Compared to their U.S. counterparts, a higher number of Japanese visitors surveyed traveled with friends or business associates (24.4%) while fewer came by themselves.

**Canadian Visitors:** A larger percentage of the Canadian visitor surveyed came with their spouses (53.4%) compared to respondents from other visitor markets, 11.5 percent were with children, and 16.2 percent were with other family members. Over 20 percent traveled with friends or business associates.

**European Visitors:** About half of the European respondents traveled to Hawaii with their spouses, 7.8 percent came with children, and 11.5 percent were with other family members. Another 18.7 percent traveled with friends or associates. A higher percentage of European Visitors surveyed traveled with their girlfriends/boyfriends (12.8%) compared to respondents from the other markets.

### **Income Level:**

**U.S. Visitors:** Survey results for 2003 showed that 19.5 percent of U.S. West and 22.1 percent of U.S. East respondents reported annual household income of less than \$50,000. U.S. West and U.S. East visitors with household income from \$50,000 to \$100,000 comprised the largest groups of respondents at 37 percent and 34.8 percent, respectively. In addition, 20.0 percent of U.S. West and 20.7 percent of U.S. East visitors reported annual household income of \$150,000 or more.

**Japanese Visitors:** Close to 39 percent of the visitors from Japan reported annual household income of less than 5 million Japanese yen (equivalent to \$43,137). Respondents with income between 5 million and 10 million Japanese yen accounted for 36.6 percent of Japanese visitor surveyed. About 8.1 percent of the respondents who visited Hawaii reported annual household income of 15 million Japanese yen or more.

**Canadian Visitors:** About 25 percent of the Canadian visitors surveyed reported annual household income of less than \$50,000. Canadians with income between \$50,000 to \$100,000 comprised the largest group (38.2%) while 16.3 percent of the respondents reported annual household income of \$150,000 or more.

**European Visitors:** Nearly 44 percent of the European visitors surveyed reported annual household income of \$50,000 or less. Those with income between \$50,000 to \$100,000 accounted for 34.2 percent while 8.5 percent of the European respondents reported annual household income of \$150,000 or more.

### **Other Visitor Characteristics:**

**U.S. West Visitors:** Over half (54%) of the U.S. West visitors who responded to the 2003 survey were female and 46 percent were male. The average age was 47 years old. About 85.9 percent have vacationed more than 2000 miles from home in the past three years. The majority (71.5%) of the respondents work, 16.5 percent have retired, 5.8 percent were homemakers while 4.4 percent were students.

About 53 percent of the respondents have some college or college degrees, 26 percent have post graduate degrees, and 6.6 percent were high school graduates.

Nearly 48 percent of the respondents have friends or relatives in Hawaii, 12.6 percent have lived in Hawaii before. Close to 8 percent own timeshare property in Hawaii while 3.2 percent own other types of property in the islands.

**U.S. East Visitors:** Similar to U.S. West visitors, 55.8 percent of the U.S. East respondents were female and 44.2 percent were male. The average age was also 48 years old. Close to 72.4 percent work, 16.5 percent have retired, 5.3 percent were homemakers while 4.1 percent were students.

About half have some college or college degrees, 29.4 percent have post graduate degrees, and 9.1 percent were high school graduates.

The majority (84.9%) of the visitors have taken a long distance trip of more than 2,000 miles from their homes in the past three years. About 6 percent of the respondents have previously lived in Hawaii, 34.9 percent have friends or relatives here, while 5.8 percent own time-share property in the islands.

**Japanese Visitors:** Similar to the U.S. respondents, the ratio of female to male Japanese visitors surveyed was 52.2 percent to 47.8 percent, respectively, but the average age was slightly younger at 43 years old. Close to 62 percent of the respondents work for a living, however there were more homemakers (18.8%) and fewer retirees (8.2%) compared to their U.S. counterparts. Additionally, 2 percent of the respondents were students.

About 41.5 percent have some college or college degrees, 3.5 percent have post graduate degrees and a larger percentage (34.1%) were high school graduates in contrast to their U.S. counterparts.

Close to 71 percent of the respondents have taken a long distance trip of more than 2,000 miles from their homes in the past three years. Fewer Japanese respondents have lived in Hawaii before (1.6%), own time share property in Hawaii (2.2%) or have friends or relatives in the islands (18.3%) compared to U.S. visitors.

**Canadian Visitors:** There were also more female respondents (52.6%) than male respondents (47.4%) among Canadian visitors surveyed. The average age was a bit older at 49 years old. About 64.5 percent of the respondents work, 2.6 percent were homemaker and 5.3 percent were students. More retirees (24%) from Canada responded to the survey compared to visitors from the other markets.

Nearly 47 percent of the respondents have some college or college degrees, 22.9 percent have post graduate degrees and 13.3 percent were high school graduates.

The majority (88.7%) of the respondents have taken a long distance trip of more than 2,000 miles from their homes in the past three years. Close to 5 percent have lived in Hawaii before, 3.4 percent own timeshare property in the islands, 21.8 percent have friends or relatives in Hawaii.

**European Visitors:** In contrast to U.S. Japanese and Canadian visitors, there were more male (59.7%) respondents from Europe compared to female (40.3%). The average age was 45 years old. Close to 90.1 percent have vacationed more than 2000 miles from home in the past three years. The largest group of respondents work for a living (70.1%), 20 percent have retired, 1.5 percent were homemakers and 4.3 percent were students.

About 39 percent of the respondents have some college or college degrees, 19.8 percent have post graduate degrees while 15.1 percent were high school graduates.

Close to 19 percent of the respondents have friends or relatives in Hawaii, 4.6 percent have lived in Hawaii before, while .6 percent own timeshare property in the islands while .7 percent own other types of property in Hawaii.

**TABLE 8.1 Visitors by Lifestyle / Lifestage  
(% of total visitors by MMA)**

| Lifestage                      | U.S. Total | U.S. West | U.S. East | Japan  | Canada | Europe |
|--------------------------------|------------|-----------|-----------|--------|--------|--------|
| All visitors                   | 100.0%     | 100.0%    | 100.0%    | 100.0% | 100.0% | 100.0% |
| Lifestyle / Lifestage segments |            |           |           |        |        |        |
| Wedding / honeymoon            | 4.2%       | 3.9%      | 4.4%      | 12.6%  | 6.1%   | 4.7%   |
| Family                         | 16.2%      | 19.8%     | 12.4%     | 29.3%  | 10.8%  | 7.4%   |
| Young                          | 19.5%      | 17.9%     | 21.1%     | 15.6%  | 20.7%  | 27.0%  |
| Middle age                     | 33.2%      | 33.4%     | 33.0%     | 21.5%  | 29.8%  | 31.1%  |
| Seniors                        | 26.9%      | 24.9%     | 29.0%     | 21.0%  | 32.7%  | 29.8%  |
| Visitation status              |            |           |           |        |        |        |
| First timers                   | 32.9%      | 22.4%     | 43.9%     | 34.7%  | 43.5%  | 69.3%  |
| Repeat visitors                | 67.1%      | 77.6%     | 56.1%     | 65.3%  | 56.5%  | 30.7%  |

Note: Wedding/Honeymoon: Visitors whose primary and secondary purpose of trip are getting married or to honeymoon.  
 Family: Visitors travelling with kids under 18 years of age and are not in the above lifestage.  
 Young: Visitors between 18 and 34 years of age and are not in the above lifestages.  
 Middle age: Visitors between 35 and 54 years of age and are not in the above lifestages.  
 Seniors: Visitors 55 years of age or over and are not in the above lifestages.

**TABLE 8.2 Visitors by Income Level and by Island -- U.S. Total  
(% of U.S. Total Visitors by Island)**

| Income                | State | Oahu  | Kauai | Maui  | Big Island |
|-----------------------|-------|-------|-------|-------|------------|
| Under \$15,000        | 1.7%  | 1.8%  | 1.3%  | 1.1%  | 1.8%       |
| \$15,000 - \$24,999   | 2.6%  | 2.8%  | 2.6%  | 1.5%  | 3.1%       |
| \$25,000 - \$29,999   | 2.5%  | 2.9%  | 1.3%  | 1.4%  | 1.2%       |
| \$30,000 - \$34,999   | 3.6%  | 3.6%  | 3.6%  | 3.3%  | 2.9%       |
| \$35,000 - \$39,999   | 3.3%  | 4.2%  | 3.6%  | 1.6%  | 3.1%       |
| \$40,000 - \$44,999   | 3.4%  | 4.0%  | 2.9%  | 3.0%  | 3.9%       |
| \$45,000 - \$49,999   | 3.8%  | 4.3%  | 2.9%  | 2.9%  | 3.5%       |
| \$50,000 - \$69,999   | 13.7% | 13.9% | 15.0% | 14.2% | 13.8%      |
| \$70,000 - \$99,999   | 22.3% | 22.6% | 23.4% | 22.0% | 21.6%      |
| \$100,000 - \$124,999 | 15.4% | 15.1% | 15.5% | 16.1% | 15.5%      |
| \$125,000 - \$149,999 | 7.5%  | 7.8%  | 7.1%  | 8.1%  | 9.8%       |
| \$150,000 or more     | 20.3% | 17.1% | 20.8% | 24.8% | 20.0%      |

**TABLE 8.3 Visitors by Income Level and by Island -- U.S. West  
(% of U.S. West Visitors by Island)**

| Income                | State | Oahu  | Kauai | Maui  | Big Island |
|-----------------------|-------|-------|-------|-------|------------|
| Under \$15,000        | 1.6%  | 1.5%  | 1.9%  | 1.1%  | 1.9%       |
| \$15,000 - \$24,999   | 2.4%  | 2.3%  | 3.0%  | 2.1%  | 3.2%       |
| \$25,000 - \$29,999   | 2.2%  | 2.5%  | 1.1%  | 1.6%  | 1.4%       |
| \$30,000 - \$34,999   | 3.2%  | 3.4%  | 4.2%  | 3.0%  | 1.9%       |
| \$35,000 - \$39,999   | 3.2%  | 4.0%  | 3.8%  | 1.8%  | 4.2%       |
| \$40,000 - \$44,999   | 3.4%  | 4.2%  | 2.3%  | 3.0%  | 3.7%       |
| \$45,000 - \$49,999   | 3.5%  | 3.8%  | 3.8%  | 2.8%  | 3.2%       |
| \$50,000 - \$69,999   | 13.6% | 13.4% | 13.6% | 13.8% | 8.3%       |
| \$70,000 - \$99,999   | 23.4% | 24.2% | 25.3% | 23.4% | 21.8%      |
| \$100,000 - \$124,999 | 16.1% | 15.7% | 14.7% | 16.7% | 18.5%      |
| \$125,000 - \$149,999 | 7.5%  | 8.2%  | 4.9%  | 6.9%  | 11.1%      |
| \$150,000 or more     | 20.0% | 16.9% | 21.5% | 23.9% | 20.8%      |

**TABLE 8.4 Visitors by Income Level and by Island -- U.S. East  
(% of U.S. East Visitors by Island)**

| Income                | State | Oahu  | Kauai | Maui  | Big Island |
|-----------------------|-------|-------|-------|-------|------------|
| Under \$15,000        | 1.7%  | 2.1%  | 0.7%  | 1.0%  | 1.8%       |
| \$15,000 - \$24,999   | 2.9%  | 3.3%  | 2.1%  | 1.0%  | 2.9%       |
| \$25,000 - \$29,999   | 2.7%  | 3.3%  | 1.4%  | 1.2%  | 1.1%       |
| \$30,000 - \$34,999   | 4.0%  | 3.8%  | 3.2%  | 3.7%  | 3.6%       |
| \$35,000 - \$39,999   | 3.4%  | 4.3%  | 3.5%  | 1.4%  | 2.2%       |
| \$40,000 - \$44,999   | 3.3%  | 3.8%  | 3.5%  | 3.0%  | 4.0%       |
| \$45,000 - \$49,999   | 4.1%  | 4.7%  | 2.1%  | 3.0%  | 3.6%       |
| \$50,000 - \$69,999   | 13.7% | 14.3% | 16.3% | 14.6% | 18.2%      |
| \$70,000 - \$99,999   | 21.1% | 21.2% | 21.6% | 20.7% | 21.5%      |
| \$100,000 - \$124,999 | 14.6% | 14.5% | 16.3% | 15.6% | 13.1%      |
| \$125,000 - \$149,999 | 7.6%  | 7.5%  | 9.2%  | 9.1%  | 8.7%       |
| \$150,000 or more     | 20.7% | 17.3% | 20.1% | 25.6% | 19.3%      |

**TABLE 8.5 Visitors by Income Level and by Island -- Japan  
(% of Japanese Visitors by Island)**

| Income (in 10,000 Japanese Yen) | State | Oahu  | Kauai | Maui  | Big Island |
|---------------------------------|-------|-------|-------|-------|------------|
| Under 150                       | 3.5%  | 3.5%  | 4.8%  | 3.0%  | 2.7%       |
| 150 - 249.999                   | 5.5%  | 5.8%  | 6.0%  | 5.2%  | 4.1%       |
| 250 - 299.999                   | 5.6%  | 5.7%  | 4.8%  | 4.9%  | 5.1%       |
| 300 - 349.999                   | 7.2%  | 7.4%  | 8.4%  | 6.0%  | 6.1%       |
| 350 - 399.999                   | 5.9%  | 6.0%  | 3.6%  | 3.8%  | 5.7%       |
| 400 - 449.999                   | 4.9%  | 5.0%  | 4.2%  | 5.2%  | 6.5%       |
| 450 - 499.999                   | 6.2%  | 6.4%  | 6.0%  | 6.3%  | 5.9%       |
| 500 - 699.999                   | 16.0% | 15.8% | 16.9% | 12.0% | 13.3%      |
| 700 - 999.999                   | 20.6% | 20.2% | 20.5% | 23.1% | 20.0%      |
| 1,000 - 1,249.999               | 11.2% | 11.4% | 9.0%  | 11.4% | 11.7%      |
| 1,250 - 1,499.999               | 5.3%  | 4.9%  | 6.0%  | 6.0%  | 8.2%       |
| 1,500 or more                   | 8.1%  | 7.9%  | 9.6%  | 13.3% | 10.8%      |

**TABLE 8.6 Visitors by Income Level and by Island -- Canada  
(% of Canadian Visitors by Island)**

| Income (in U.S. dollars) | State | Oahu  | Kauai | Maui  | Big Island |
|--------------------------|-------|-------|-------|-------|------------|
| Under \$15,000           | 2.3%  | 2.5%  | 1.4%  | 0.5%  | 2.3%       |
| \$15,000 - \$24,999      | 3.5%  | 4.2%  | 1.9%  | 2.4%  | 3.2%       |
| \$25,000 - \$29,999      | 2.1%  | 2.9%  | 1.9%  | 1.4%  | 1.4%       |
| \$30,000 - \$34,999      | 3.9%  | 3.7%  | 3.8%  | 3.0%  | 3.2%       |
| \$35,000 - \$39,999      | 4.3%  | 5.2%  | 2.8%  | 3.5%  | 4.1%       |
| \$40,000 - \$44,999      | 4.6%  | 4.8%  | 5.7%  | 5.4%  | 6.4%       |
| \$45,000 - \$49,999      | 4.0%  | 4.4%  | 2.4%  | 4.9%  | 3.2%       |
| \$50,000 - \$69,999      | 16.3% | 18.7% | 22.3% | 15.4% | 17.0%      |
| \$70,000 - \$99,999      | 21.9% | 22.0% | 26.5% | 24.6% | 22.0%      |
| \$100,000 - \$124,999    | 13.9% | 13.5% | 10.9% | 14.9% | 13.3%      |
| \$125,000 - \$149,999    | 6.8%  | 5.8%  | 7.6%  | 7.6%  | 6.9%       |
| \$150,000 or more        | 16.3% | 12.3% | 12.8% | 16.5% | 17.0%      |

**TABLE 8.7 Visitors by Income Level and by Island -- Europe**  
 (% of European Visitors by Island)

| Income (in U.S. dollars) | State | Oahu  | Kauai | Maui  | Big Island |
|--------------------------|-------|-------|-------|-------|------------|
| Under \$15,000           | 4.5%  | 5.0%  | 4.2%  | 3.7%  | 4.8%       |
| \$15,000 - \$24,999      | 8.0%  | 8.4%  | 5.0%  | 6.2%  | 6.6%       |
| \$25,000 - \$29,999      | 5.0%  | 4.6%  | 5.2%  | 4.4%  | 4.5%       |
| \$30,000 - \$34,999      | 6.6%  | 7.4%  | 6.5%  | 7.7%  | 6.5%       |
| \$35,000 - \$39,999      | 6.1%  | 6.5%  | 5.0%  | 6.0%  | 6.5%       |
| \$40,000 - \$44,999      | 6.8%  | 7.1%  | 7.7%  | 6.5%  | 7.5%       |
| \$45,000 - \$49,999      | 6.8%  | 6.7%  | 6.3%  | 6.2%  | 7.0%       |
| \$50,000 - \$69,999      | 16.6% | 16.9% | 16.1% | 16.1% | 17.4%      |
| \$70,000 - \$99,999      | 17.6% | 17.7% | 18.8% | 18.1% | 17.4%      |
| \$100,000 - \$124,999    | 8.9%  | 8.7%  | 10.5% | 9.9%  | 8.1%       |
| \$125,000 - \$149,999    | 4.6%  | 4.0%  | 4.4%  | 4.6%  | 5.6%       |
| \$150,000 or more        | 8.5%  | 7.1%  | 10.3% | 10.6% | 8.1%       |

**TABLE 8.8 Visitor by Companion Type**  
 (% of Total Visitors by MMA)

| Companion Type                   | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|----------------------------------|------------|-----------|-----------|-------|--------|--------|
| With spouse                      | 50.4%      | 46.6%     | 54.4%     | 48.4% | 53.4%  | 50.6%  |
| With children under 18           | 16.4%      | 20.1%     | 12.6%     | 32.1% | 11.5%  | 7.8%   |
| With other family members        | 20.8%      | 19.2%     | 22.4%     | 14.0% | 16.2%  | 11.5%  |
| With friends/business associates | 19.8%      | 20.3%     | 19.3%     | 24.4% | 20.7%  | 18.7%  |
| with girl/ boy friend            | 7.4%       | 8.3%      | 6.6%      | 2.5%  | 8.6%   | 12.8%  |
| Same sex partner                 | 2.3%       | 2.1%      | 2.6%      | 2.3%  | 1.5%   | 1.9%   |
| Alone                            | 12.6%      | 13.5%     | 11.7%     | 5.8%  | 9.6%   | 11.9%  |
| Other                            | 2.1%       | 2.0%      | 2.2%      | 3.3%  | 3.9%   | 2.0%   |

Note: Percentages sum more than 100 percent due to multiple companions.

**TABLE 8.9 Visitor Travel History by MMA**  
 (% of Respondents by MMA)

| Travel History                | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|-------------------------------|------------|-----------|-----------|-------|--------|--------|
| Trips Taken in Past 3 Years 1 |            |           |           |       |        |        |
| 1 trip                        | 5.2%       | 5.7%      | 4.8%      | 4.4%  | 6.9%   | 4.0%   |
| 2 to 4 trips                  | 34.1%      | 33.3%     | 34.8%     | 33.5% | 39.0%  | 29.9%  |
| 5 to 9 trips                  | 35.1%      | 33.6%     | 36.7%     | 34.4% | 33.0%  | 38.2%  |
| 10 or more trips              | 25.6%      | 27.4%     | 23.6%     | 27.7% | 21.2%  | 27.9%  |
| Took a Long Distance Trip 2   | 85.4%      | 85.9%     | 84.9%     | 71.4% | 88.7%  | 90.1%  |

1 Not including this trip to Hawaii.

2 Not including this trip to Hawaii, vacationed more than 2,000 miles from home in the past 3 years.

**TABLE 8.10 Visitor Relationship with Hawaii by MMA**  
(% of Respondents by MMA)

| Visitor Characteristics                 | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|---|------------|-----------|-----------|-------|--------|--------|
| Lived in Hawaii Before                  | 9.5%       | 12.6%     | 6.4%      | 1.6%  | 4.5%   | 4.6%   |
| Have Friends and/or Relatives in Hawaii | 41.5%      | 47.8%     | 34.9%     | 18.3% | 21.8%  | 18.9%  |
| Own time share property in Hawaii       | 6.9%       | 7.9%      | 5.8%      | 2.2%  | 3.4%   | 0.6%   |
| Own other types of property in Hawaii   | 2.3%       | 3.2%      | 1.3%      | 1.3%  | 1.3%   | 0.7%   |
| Percentage of Male Respondents          | 45.1%      | 46.0%     | 44.2%     | 47.8% | 47.4%  | 59.7%  |
| Percentage of Female Respondents        | 54.9%      | 54.0%     | 55.8%     | 52.2% | 52.6%  | 40.3%  |
| Median Age of Respondents               | 47         | 47        | 48        | 43    | 49     | 45     |

**TABLE 8.11 Visitor Education Level by MMA**  
(% of Respondents by MMA)

| Education Level               | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|-------------------------------|------------|-----------|-----------|-------|--------|--------|
| No high school                | 0.1%       | 0.1%      | 0.1%      | 2.1%  | 0.9%   | 3.7%   |
| Some high school              | 0.9%       | 1.0%      | 0.8%      | 0.8%  | 3.5%   | 7.7%   |
| High school graduate          | 7.8%       | 6.6%      | 9.1%      | 34.1% | 13.3%  | 15.1%  |
| Some college                  | 18.4%      | 20.2%     | 16.5%     | 7.7%  | 14.7%  | 13.8%  |
| Associates (2-year) degree    | 8.9%       | 10.5%     | 7.3%      | 12.0% | 5.5%   | 4.9%   |
| College graduate (4-year)     | 33.1%      | 32.3%     | 33.8%     | 33.8% | 31.8%  | 25.2%  |
| Post graduate degree          | 27.6%      | 26.0%     | 29.4%     | 3.5%  | 22.9%  | 19.8%  |
| Vocational / technical degree | 3.2%       | 3.3%      | 3.1%      | 5.9%  | 7.6%   | 9.9%   |

**TABLE 8.12 Visitor Employment Status by MMA**  
(% of Respondents by MMA)

| Employment Status | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|-------------------|------------|-----------|-----------|-------|--------|--------|
| Working           | 72.0%      | 71.5%     | 72.4%     | 61.9% | 64.5%  | 70.1%  |
| Retired           | 16.5%      | 16.5%     | 16.5%     | 8.2%  | 24.0%  | 20.0%  |
| Student           | 4.2%       | 4.4%      | 4.1%      | 2.0%  | 5.3%   | 4.3%   |
| Homemaker         | 5.5%       | 5.8%      | 5.3%      | 18.8% | 2.6%   | 1.5%   |
| Other             | 1.8%       | 1.8%      | 1.7%      | 9.1%  | 3.6%   | 4.2%   |



**TABLE 8.13** Visitor Primary Purpose of Trip  
(% of Total Visitors by MMA)

| Purpose                                      | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|--|------------|-----------|-----------|-------|--------|--------|
| Vacation                                     | 64.2%      | 66.3%     | 61.9%     | 66.8% | 74.4%  | 70.7%  |
| Get married                                  | 2.4%       | 2.5%      | 2.4%      | 2.9%  | 3.6%   | 2.1%   |
| Honeymoon                                    | 0.2%       | 0.2%      | 0.2%      | 7.7%  | 0.2%   | 0.3%   |
| Attend/participate in wedding                | 0.4%       | 0.4%      | 0.5%      | 9.0%  | 0.5%   | 0.4%   |
| Attend a business meeting / conduct business | 8.4%       | 8.6%      | 8.2%      | 2.0%  | 2.8%   | 2.5%   |
| Attend a convention / conference / seminar   | 3.9%       | 2.7%      | 5.3%      | 0.9%  | 4.8%   | 3.8%   |
| Visit friends / relatives                    | 10.0%      | 10.3%     | 9.7%      | 2.4%  | 3.4%   | 6.1%   |
| Attend / participate in a sporting event     | 1.4%       | 1.3%      | 1.4%      | 2.6%  | 2.1%   | 2.2%   |
| Attend / participate in a cultural event     | 3.6%       | 3.8%      | 3.5%      | 2.1%  | 2.8%   | 3.3%   |
| Medical treatment                            | 0.9%       | 0.7%      | 1.1%      | 0.0%  | 1.1%   | 1.5%   |
| Other  | 4.5%       | 3.2%      | 5.9%      | 3.5%  | 4.4%   | 7.0%   |

**TABLE 8.14** Visitor Primary Purpose of Trip by Lifestage: U.S. Total  
(% of Total U.S. Visitors)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 17.6%                          | 80.1%  | 53.1% | 61.6%      | 73.1%   | 63.1%             | 64.8%           |
| Get married                                  | 58.3%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.4%              | 2.5%            |
| Honeymoon                                    | 5.6%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 0.1%              | 0.3%            |
| Attend/participate in wedding                | 0.0%                           | 0.0%   | 0.8%  | 0.5%       | 0.3%    | 0.1%              | 0.5%            |
| Attend a business meeting / conduct business | 0.0%                           | 2.9%   | 7.0%  | 14.9%      | 6.3%    | 6.6%              | 9.4%            |
| Attend a convention / conference / seminar   | 1.9%                           | 2.9%   | 2.2%  | 6.1%       | 3.5%    | 5.4%              | 3.4%            |
| Visit friends / relatives                    | 2.8%                           | 11.1%  | 11.1% | 7.9%       | 11.8%   | 6.7%              | 11.3%           |
| Attend / participate in a sporting event     | 0.0%                           | 0.0%   | 0.8%  | 0.5%       | 0.3%    | 0.1%              | 0.5%            |
| Attend / participate in a cultural event     | 0.9%                           | 1.5%   | 4.4%  | 4.4%       | 3.5%    | 2.8%              | 3.7%            |
| Medical treatment                            | 9.3%                           | 0.0%   | 1.0%  | 0.6%       | 0.4%    | 1.6%              | 0.6%            |
| Other  | 3.7%                           | 0.2%   | 18.3% | 2.2%       | 0.4%    | 9.7%              | 2.2%            |

**TABLE 8.15** Visitor Primary Purpose of Trip by Lifestage: U.S. West  
(% of U.S. West Visitors)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 17.3%                          | 78.5%  | 60.2% | 64.1%      | 72.6%   | 69.3%             | 65.7%           |
| Get married                                  | 63.5%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.8%              | 2.5%            |
| Honeymoon                                    | 5.8%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 0.0%              | 0.3%            |
| Attend/participate in wedding                | 0.0%                           | 0.0%   | 0.8%  | 0.7%       | 0.0%    | 0.0%              | 0.5%            |
| Attend a business meeting / conduct business | 0.0%                           | 3.1%   | 6.8%  | 14.2%      | 8.1%    | 5.9%              | 9.3%            |
| Attend a convention / conference / seminar   | 0.0%                           | 3.8%   | 1.3%  | 2.7%       | 3.1%    | 3.8%              | 2.4%            |
| Visit friends / relatives                    | 3.8%                           | 11.5%  | 11.9% | 8.7%       | 10.9%   | 5.6%              | 11.4%           |
| Attend / participate in a sporting event     | 0.0%                           | 1.9%   | 1.3%  | 1.6%       | 0.6%    | 0.7%              | 1.4%            |
| Attend / participate in a cultural event     | 1.9%                           | 1.2%   | 4.2%  | 5.0%       | 3.7%    | 2.8%              | 3.9%            |
| Medical treatment                            | 7.7%                           | 0.0%   | 0.4%  | 0.7%       | 0.3%    | 0.3%              | 0.8%            |
| Other  | 0.0%                           | 0.0%   | 13.1% | 2.3%       | 0.6%    | 8.7%              | 1.8%            |

**TABLE 8.16 Visitor Primary Purpose of Trip by Lifestage: U.S. East  
(% of U.S. East Visitors)**

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |               |         | Visitation Status |                    |
|--|--------------------------------|--------|-------|---------------|---------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family | Young | Middle<br>Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| Vacation                                     | 17.9%                          | 83.0%  | 46.7% | 59.0%         | 73.6%   | 59.8%             | 63.5%              |
| Get married                                  | 53.6%                          | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 2.2%              | 2.6%               |
| Honeymoon                                    | 5.4%                           | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 0.2%              | 0.3%               |
| Attend/participate in wedding                | 0.0%                           | 0.0%   | 0.8%  | 0.2%          | 0.6%    | 0.2%              | 0.6%               |
| Attend a business meeting / conduct business | 0.0%                           | 2.6%   | 7.3%  | 15.6%         | 4.7%    | 6.9%              | 9.5%               |
| Attend a convention / conference / seminar   | 3.6%                           | 1.3%   | 3.1%  | 9.8%          | 3.9%    | 6.2%              | 4.8%               |
| Visit friends / relatives                    | 1.8%                           | 10.5%  | 10.3% | 7.1%          | 12.7%   | 7.3%              | 11.3%              |
| Attend / participate in a sporting event     | 0.0%                           | 0.0%   | 2.7%  | 2.0%          | 0.6%    | 1.9%              | 1.0%               |
| Attend / participate in a cultural event     | 0.0%                           | 2.0%   | 4.6%  | 3.7%          | 3.3%    | 2.8%              | 3.3%               |
| Medical treatment                            | 10.7%                          | 0.0%   | 1.5%  | 0.5%          | 0.6%    | 2.2%              | 0.3%               |
| Other  | 7.1%                           | 0.7%   | 23.0% | 2.2%          | 0.3%    | 10.3%             | 2.9%               |

**TABLE 8.17 Visitor Primary Purpose of Trip by Lifestage: Japan  
(% of Japanese Visitors)**

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |               |         | Visitation Status |                    |
|--|--------------------------------|--------|-------|---------------|---------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family | Young | Middle<br>Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| Vacation                                     | 13.6%                          | 75.5%  | 75.7% | 81.3%         | 65.7%   | 51.8%             | 74.5%              |
| Get married                                  | 22.8%                          | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 5.2%              | 2.0%               |
| Honeymoon                                    | 60.4%                          | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 16.0%             | 3.4%               |
| Attend/participate in wedding                | 1.3%                           | 16.8%  | 6.7%  | 3.3%          | 10.3%   | 14.6%             | 6.1%               |
| Attend a business meeting / conduct business | 0.3%                           | 0.4%   | 3.8%  | 4.1%          | 1.6%    | 2.1%              | 2.1%               |
| Attend a convention / conference / seminar   | 0.3%                           | 0.4%   | 1.0%  | 1.1%          | 1.9%    | 1.5%              | 0.6%               |
| Visit friends / relatives                    | 0.3%                           | 1.7%   | 2.7%  | 2.0%          | 5.3%    | 1.5%              | 2.8%               |
| Attend / participate in a sporting event     | 0.3%                           | 1.3%   | 3.8%  | 2.1%          | 5.2%    | 3.3%              | 2.4%               |
| Attend / participate in a cultural event     | 0.8%                           | 2.1%   | 2.1%  | 2.3%          | 2.6%    | 1.7%              | 2.0%               |
| Medical treatment                            | 0.0%                           | 0.0%   | 0.0%  | 0.2%          | 0.0%    | 0.0%              | 0.1%               |
| Other  | 0.3%                           | 1.7%   | 4.2%  | 3.6%          | 7.4%    | 2.2%              | 4.2%               |

**TABLE 8.18 Visitor Primary Purpose of Trip by Lifestage: Canada  
(% of Canadian Visitors)**

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |               |         | Visitation Status |                    |
|--|--------------------------------|--------|-------|---------------|---------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family | Young | Middle<br>Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| Vacation                                     | 16.4%                          | 88.5%  | 55.1% | 76.7%         | 90.8%   | 68.4%             | 79.8%              |
| Get married                                  | 60.0%                          | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 5.6%              | 1.8%               |
| Honeymoon                                    | 3.6%                           | 0.0%   | 0.0%  | 0.0%          | 0.0%    | 0.0%              | 0.4%               |
| Attend/participate in wedding                | 1.8%                           | 0.0%   | 0.5%  | 0.4%          | 0.7%    | 0.8%              | 0.4%               |
| Attend a business meeting / conduct business | 0.0%                           | 1.0%   | 3.8%  | 3.7%          | 2.4%    | 2.1%              | 3.1%               |
| Attend a convention / conference / seminar   | 0.0%                           | 3.1%   | 4.3%  | 8.9%          | 2.7%    | 5.3%              | 4.3%               |
| Visit friends / relatives                    | 1.8%                           | 3.1%   | 7.0%  | 3.0%          | 2.0%    | 2.4%              | 4.5%               |
| Attend / participate in a sporting event     | 5.5%                           | 2.1%   | 2.7%  | 2.2%          | 0.7%    | 3.5%              | 0.8%               |
| Attend / participate in a cultural event     | 0.0%                           | 1.0%   | 5.9%  | 3.0%          | 0.7%    | 1.9%              | 2.7%               |
| Medical treatment                            | 7.3%                           | 1.0%   | 2.2%  | 0.4%          | 0.0%    | 1.6%              | 0.6%               |
| Other  | 3.6%                           | 0.0%   | 18.4% | 1.9%          | 0.0%    | 8.5%              | 1.6%               |

**TABLE 8.19 Visitor Primary Purpose of Trip by Lifestage: Europe  
(% of European Visitors)**

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Visitation Status |                    |
|--|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| Vacation                                     | 24.2%                          | 75.6%  | 61.0% | 72.2%      | 83.9%   | 71.8%             | 68.2%              |
| Get married                                  | 45.5%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.5%              | 1.8%               |
| Honeymoon                                    | 7.1%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 0.4%              | 0.2%               |
| Attend/participate in wedding                | 0.0%                           | 0.0%   | 0.5%  | 0.8%       | 0.0%    | 0.4%              | 0.5%               |
| Attend a business meeting / conduct business | 1.0%                           | 1.3%   | 2.8%  | 4.2%       | 1.0%    | 1.9%              | 3.7%               |
| Attend a convention / conference / seminar   | 0.0%                           | 1.3%   | 3.4%  | 6.8%       | 2.6%    | 3.9%              | 4.2%               |
| Visit friends / relatives                    | 1.0%                           | 15.4%  | 5.6%  | 4.5%       | 6.8%    | 3.8%              | 11.4%              |
| Attend / participate in a sporting event     | 2.0%                           | 3.2%   | 2.5%  | 1.9%       | 1.9%    | 1.9%              | 2.8%               |
| Attend / participate in a cultural event     | 2.0%                           | 1.3%   | 4.4%  | 3.2%       | 3.1%    | 3.1%              | 3.4%               |
| Medical treatment                            | 12.1%                          | 0.6%   | 2.3%  | 0.8%       | 0.2%    | 1.9%              | 0.6%               |
| Other  | 5.1%                           | 1.3%   | 17.5% | 5.7%       | 0.6%    | 8.3%              | 3.2%               |

**TABLE 8.20 Visitor Secondary Purpose of Trip  
(% of Total Visitors by MMA)**

| Purpose                                      | U.S. Total | U.S. West | U.S. East | Japan | Canada | Europe |
|--|------------|-----------|-----------|-------|--------|--------|
| Vacation                                     | 53.2%      | 51.6%     | 54.8%     | 43.9% | 52.1%  | 57.1%  |
| Get married                                  | 0.9%       | 1.0%      | 0.7%      | 4.9%  | 1.5%   | 2.3%   |
| Honeymoon                                    | 3.1%       | 2.6%      | 3.8%      | 9.3%  | 5.7%   | 5.3%   |
| Attend/participate in wedding                | 1.8%       | 2.1%      | 1.6%      | 13.1% | 4.2%   | 2.1%   |
| Attend a business meeting / conduct business | 8.3%       | 8.2%      | 8.4%      | 4.2%  | 6.6%   | 4.5%   |
| Attend a convention / conference / seminar   | 3.0%       | 2.4%      | 3.6%      | 3.4%  | 5.1%   | 3.2%   |
| Visit friends / relatives                    | 24.9%      | 27.5%     | 22.2%     | 11.0% | 20.2%  | 19.0%  |
| Attend / participate in a sporting event     | 2.4%       | 2.7%      | 2.2%      | 7.7%  | 3.3%   | 5.2%   |
| Attend / participate in a cultural event     | 2.3%       | 2.4%      | 2.2%      | 2.1%  | 2.7%   | 4.5%   |
| Medical treatment                            | 1.0%       | 0.9%      | 1.1%      | 2.7%  | 1.2%   | 1.3%   |
| Other  | 11.4%      | 11.3%     | 11.5%     | 17.0% | 12.7%  | 10.3%  |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.21 Visitor Secondary Purpose of Trip by Lifestage: U.S. Total  
(% of U.S. Total Visitors in Segments)**

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                    |
|--|--------------------------------|--------|-------|------------|---------|-------------------|--------------------|
|  | Wedding /<br>Honeymoon         | Family | Young | Middle Age | Seniors | First<br>Timers   | Repeat<br>Visitors |
| Vacation                                     | 51.6%                          | 46.1%  | 57.5% | 54.5%      | 52.2%   | 58.0%             | 50.8%              |
| Get married                                  | 10.8%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 1.4%              | 0.7%               |
| Honeymoon                                    | 38.7%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 7.0%              | 1.2%               |
| Attend/participate in wedding                | 8.6%                           | 1.8%   | 2.7%  | 0.8%       | 0.0%    | 2.2%              | 1.6%               |
| Attend a business meeting / conduct business | 6.5%                           | 13.2%  | 5.3%  | 9.7%       | 7.1%    | 6.7%              | 9.5%               |
| Attend a convention / conference / seminar   | 5.4%                           | 3.0%   | 2.2%  | 3.2%       | 2.4%    | 2.2%              | 3.3%               |
| Visit friends / relatives                    | 18.3%                          | 29.9%  | 27.0% | 22.6%      | 24.9%   | 19.6%             | 27.0%              |
| Attend / participate in a sporting event     | 8.6%                           | 1.8%   | 2.7%  | 1.3%       | 2.4%    | 3.4%              | 2.1%               |
| Attend / participate in a cultural event     | 9.7%                           | 1.2%   | 3.1%  | 0.8%       | 2.0%    | 2.8%              | 2.1%               |
| Medical treatment                            | 7.5%                           | 0.6%   | 0.0%  | 0.0%       | 1.2%    | 1.4%              | 0.8%               |
| Other  | 9.7%                           | 10.8%  | 6.6%  | 12.9%      | 14.6%   | 10.4%             | 11.9%              |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.22 Visitor Secondary Purpose of Trip by Lifestage: U.S. West**  
(% of U.S. West Visitors in Segments)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 48.8%                          | 47.4%  | 49.1% | 53.3%      | 57.3%   | 54.8%             | 51.1%           |
| Get Married                                  | 14.0%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.4%              | 0.7%            |
| Honeymoon                                    | 34.9%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 5.6%              | 1.6%            |
| Attend / participate in a wedding            | 9.3%                           | 1.8%   | 2.8%  | 1.6%       | 0.0%    | 3.2%              | 1.8%            |
| Attend a business meeting / conduct business | 9.3%                           | 14.0%  | 4.7%  | 9.2%       | 4.8%    | 7.9%              | 8.7%            |
| Attend a convention / conference / seminar   | 7.0%                           | 2.6%   | 0.9%  | 2.7%       | 0.8%    | 2.4%              | 2.3%            |
| Visit friends / relatives                    | 23.3%                          | 30.7%  | 33.0% | 25.0%      | 23.4%   | 21.4%             | 28.4%           |
| Attend / participate in a sporting event     | 9.3%                           | 2.6%   | 3.8%  | 1.6%       | 1.6%    | 4.8%              | 2.3%            |
| Attend / participate in a cultural event     | 11.6%                          | 1.8%   | 2.8%  | 0.5%       | 2.4%    | 3.2%              | 2.3%            |
| Medical treatment                            | 9.3%                           | 0.9%   | 0.0%  | 0.0%       | 0.0%    | 2.4%              | 0.5%            |
| Other  | 9.3%                           | 8.8%   | 11.3% | 10.3%      | 15.3%   | 11.9%             | 11.0%           |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.23 Visitor Secondary Purpose of Trip by Lifestage: U.S. East**  
(% of U.S. East Visitors in Segments)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 54.0%                          | 43.4%  | 65.0% | 55.6%      | 47.3%   | 59.7%             | 50.3%           |
| Get Married                                  | 8.0%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 0.9%              | 0.6%            |
| Honeymoon                                    | 42.0%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 7.8%              | 0.6%            |
| Attend / participate in a wedding            | 8.0%                           | 1.9%   | 2.5%  | 0.0%       | 0.0%    | 1.7%              | 1.3%            |
| Attend a business meeting / conduct business | 4.0%                           | 11.3%  | 5.8%  | 10.2%      | 9.3%    | 6.1%              | 10.6%           |
| Attend a convention / conference / seminar   | 4.0%                           | 3.8%   | 3.3%  | 3.6%       | 3.9%    | 2.2%              | 4.8%            |
| Visit friends / relatives                    | 14.0%                          | 28.3%  | 21.7% | 20.4%      | 26.4%   | 18.6%             | 25.0%           |
| Attend / participate in a sporting event     | 8.0%                           | 0.0%   | 1.7%  | 1.0%       | 3.1%    | 2.6%              | 1.9%            |
| Attend / participate in a cultural event     | 8.0%                           | 0.0%   | 3.3%  | 1.0%       | 1.6%    | 2.6%              | 1.9%            |
| Medical treatment                            | 6.0%                           | 0.0%   | 0.0%  | 0.0%       | 2.3%    | 0.9%              | 1.3%            |
| Other  | 10.0%                          | 15.1%  | 2.5%  | 15.3%      | 14.0%   | 9.5%              | 13.1%           |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.24 Visitor Secondary Purpose of Trip by Lifestage: Japan**  
(% of Japanese Visitors in Segments)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 51.0%                          | 42.1%  | 51.7% | 37.2%      | 36.8%   | 53.8%             | 38.6%           |
| Get Married                                  | 20.8%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 3.7%              | 4.9%            |
| Honeymoon                                    | 39.6%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 14.3%             | 6.5%            |
| Attend / participate in a wedding            | 9.9%                           | 13.2%  | 15.4% | 19.2%      | 6.4%    | 12.1%             | 12.9%           |
| Attend a business meeting / conduct business | 4.0%                           | 4.4%   | 2.1%  | 4.5%       | 6.4%    | 2.6%              | 5.3%            |
| Attend a convention / conference / seminar   | 4.5%                           | 2.6%   | 0.7%  | 6.4%       | 2.4%    | 1.8%              | 4.3%            |
| Visit friends / relatives                    | 5.0%                           | 15.8%  | 10.5% | 10.3%      | 14.4%   | 5.5%              | 14.3%           |
| Attend / participate in a sporting event     | 7.4%                           | 5.7%   | 7.7%  | 10.9%      | 7.2%    | 4.0%              | 9.2%            |
| Attend / participate in a cultural event     | 3.5%                           | 2.2%   | 0.7%  | 1.3%       | 2.4%    | 0.7%              | 2.7%            |
| Medical treatment                            | 5.0%                           | 3.5%   | 0.7%  | 0.6%       | 1.6%    | 2.2%              | 2.4%            |
| Other  | 6.9%                           | 17.1%  | 21.7% | 16.7%      | 28.0%   | 13.6%             | 17.6%           |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.25 Visitor Secondary Purpose of Trip by Lifestage: Canada**  
(% of Canadian Visitors in Segments)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 55.6%                          | 51.9%  | 59.8% | 51.0%      | 40.0%   | 60.7%             | 43.7%           |
| Get Married                                  | 11.1%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 3.3%              | 0.0%            |
| Honeymoon                                    | 42.2%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 10.0%             | 2.5%            |
| Attend / participate in a wedding            | 11.1%                          | 11.1%  | 4.9%  | 2.0%       | 0.0%    | 6.0%              | 2.5%            |
| Attend a business meeting / conduct business | 8.9%                           | 0.0%   | 3.7%  | 9.8%       | 6.2%    | 4.7%              | 7.6%            |
| Attend a convention / conference / seminar   | 11.1%                          | 3.7%   | 4.9%  | 3.9%       | 4.6%    | 6.0%              | 5.1%            |
| Visit friends / relatives                    | 24.4%                          | 14.8%  | 15.9% | 19.6%      | 27.7%   | 14.7%             | 25.3%           |
| Attend / participate in a sporting event     | 4.4%                           | 3.7%   | 2.4%  | 3.9%       | 3.1%    | 3.3%              | 3.8%            |
| Attend / participate in a cultural event     | 8.9%                           | 0.0%   | 2.4%  | 1.0%       | 3.1%    | 4.7%              | 1.3%            |
| Medical treatment                            | 8.9%                           | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.7%              | 0.0%            |
| Other  | 4.4%                           | 14.8%  | 7.3%  | 14.7%      | 20.0%   | 11.3%             | 14.6%           |

Note: Percentages sum more than 100 percent due to multiple answers selected.

**TABLE 8.26 Visitor Secondary Purpose of Trip by Lifestage: Europe**  
(% of European Visitors in Segments)

| Purpose                                      | Lifestyle / Lifestage Segments |        |       |            |         | Repeat Visitation |                 |
|--|--------------------------------|--------|-------|------------|---------|-------------------|-----------------|
|  | Wedding / Honeymoon            | Family | Young | Middle Age | Seniors | First Timers      | Repeat Visitors |
| Vacation                                     | 42.5%                          | 68.1%  | 59.6% | 61.0%      | 52.0%   | 57.2%             | 56.3%           |
| Get Married                                  | 19.5%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 2.7%              | 1.9%            |
| Honeymoon                                    | 46.0%                          | 0.0%   | 0.0%  | 0.0%       | 0.0%    | 6.5%              | 3.7%            |
| Attend / participate in a wedding            | 10.3%                          | 0.0%   | 0.0%  | 2.3%       | 1.2%    | 1.8%              | 3.0%            |
| Attend a business meeting / conduct business | 9.2%                           | 0.0%   | 4.5%  | 4.7%       | 3.5%    | 4.9%              | 3.4%            |
| Attend a convention / conference / seminar   | 9.2%                           | 2.1%   | 3.1%  | 1.4%       | 2.9%    | 3.3%              | 3.0%            |
| Visit friends / relatives                    | 14.9%                          | 14.9%  | 21.1% | 16.9%      | 22.0%   | 14.3%             | 26.9%           |
| Attend / participate in a sporting event     | 8.0%                           | 0.0%   | 8.5%  | 4.7%       | 1.7%    | 5.6%              | 5.2%            |
| Attend / participate in a cultural event     | 5.7%                           | 2.1%   | 3.6%  | 4.2%       | 6.4%    | 6.0%              | 2.6%            |
| Medical treatment                            | 6.9%                           | 0.0%   | 1.3%  | 0.0%       | 0.6%    | 1.1%              | 1.9%            |
| Other  | 2.3%                           | 12.8%  | 8.5%  | 12.2%      | 13.9%   | 10.5%             | 10.1%           |

Note: Percentages sum more than 100 percent due to multiple answers selected.

## 9. DEFINITION & SURVEY METHODOLOGY

## DEFINITIONS AND SURVEY METHODOLOGY

### DEFINITIONS

**Visitor:** Out-of-state traveler who stayed in Hawaii for a period of time between one night but less than one year.

**Major Market Areas (MMAs):** The following geographical areas are defined by the Hawaii Tourism Authority for marketing purposes to make the State more globally competitive:

1. U.S. West – Pacific (Alaska, California, Oregon, Washington) and Mountain (Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming) States.
2. U.S. East – Other States in the Continental U.S.
3. Japan
4. Canada
5. Europe – United Kingdom, Germany, France, Italy, and Switzerland
6. Oceania – Australia and New Zealand
7. Other Asia – China, Hong Kong, Korea, Singapore and Taiwan
8. Latin America – Argentina, Brazil and Mexico
9. Other – All countries and districts not listed in MMA 1 to 8 above, including Guam, Puerto Rico, U.S. Virgin Islands, and other U.S. territories

### **Visitor Lifestyle and Life Stage:**

Wedding/Honeymoon visitors: Visitors whose primary and secondary purpose of trip are getting married or to honeymoon.

Family: Visitors traveling with kids under 18 years of age and are not in the above lifestage.

Young: Visitors between 18 and 34 years of age and are not in the above lifestages.

Middle Age: Visitors between 35 and 54 years of age and are not in the above lifestages.

Seniors: Visitors 55 years of age or over and are not in the above lifestages.

## **SURVEY METHODOLOGY:**

*The Visitor Satisfaction Survey* was a mail survey conducted among U.S., Japanese, Canadian, and European visitors to Hawai'i. The survey was designed to measure the satisfaction levels with the state of Hawaii as a vacation destination, and to obtain information on their trip planning, activity patterns, overall trip experiences, and profile.

Survey questionnaires were mailed to selected U.S., Japanese, Canadian and European visitors after they have returned home. The U.S. samples were drawn from the completed Domestic In-Flight Survey forms. The Japanese, Canadian, and European samples were drawn from the completed Departure Survey forms.

There are two versions of the *Visitor Satisfaction Survey* form, one in English and the other in Japanese. The 2003 survey has 8 pages and 33 questions. New in the 2003 survey are questions on public walk, property ownership in Hawaii, trip spending, a breakdown of wedding and honeymoon, and added "same sex partner" to the type of trip companion.

Surveys forms were printed in a booklet form and in two-color print.

The English survey instrument is presented in Section 10 of this report.

In 2003, a total of 9,768 questionnaires were mailed to Japanese visitors, 3,138 of which responded, translating into a response rate of 32.1 percent. 11,168 questionnaires were mailed to U.S. visitors, 2,921 of which were returned or a response rate of 26.2 percent. A total of 11,112 survey forms were mailed to Canadian and European visitors during 2003, 3,093 of which responded, yielded a response rate of 27.8 percent. Sampling errors are calculated to be 2.6% percent for U.S. West visitors, 2.7 percent for U.S. East visitors, 1.7 percent for Japanese visitors, 3.2 percent for Canadian visitors, and 2.1% for European visitors.

Due to the low number of samples achieved, data for Lanai and Molokai were not presented in most of the data tables in this report.



**10. 2003 VISITOR SATISFACTION  
SURVEY FORM  
(English version)**





## 2003 VISITOR SATISFACTION SURVEY

Aloha! Please answer each question candidly. We need your feedback to evaluate how well we take care of those who visit our islands. Your answers will help us improve the Hawaiian experience for all visitors. Although your name appears on this form, your responses will be kept completely confidential; answers from all respondents will be tallied as totals, not individual responses. Mahalo.

**Instructions:** Please answer each question by marking the box with a  or writing in the space provided with a black pen or dark lead pencil. Return the completed survey in the postage-paid envelope as soon as possible.

1. Overall, how would you rate your most recent trip in Hawai'i?

- Excellent
- Above average
- Below average
- Poor

2. Would you say this trip to Hawai'i...?

- Exceeded your expectations
- Met your expectations
- Did not meet your expectations

3. How likely are you to recommend Hawai'i as a vacation place to your friends and relatives?

- Very likely
- Somewhat likely
- Not too likely
- Not at all likely

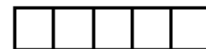
4a. How likely are you to visit Hawai'i in the next five years?

- Very likely
- Somewhat likely
- Not too likely
- Not at all likely

**IF YOU CHECKED NOT TOO LIKELY OR NOT AT ALL LIKELY...**

4b. Why would you be unlikely to revisit Hawai'i? (Check  all that apply).

- Flight is too long
- Too commercial/overdeveloped
- Too crowded/congested
- Too expensive
- Want to go someplace new
- Other (Specify at right) \_\_\_\_\_



5a. In particular, how satisfied were you with...

|   | Very Satisfied           | Somewhat Satisfied       | Somewhat Dissatisfied    | Not Satisfied At all     | Not Applicable           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Accommodations (overall)</b> -----                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| location -----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| service -----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| facility-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| cleanliness and comfort -----                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Restaurants (overall)</b> -----                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| location -----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| variety of choices-----                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| service-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| quality and taste of the food-----                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Shopping (overall)</b> -----                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| a sufficient number of shopping places -----                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| locations-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| variety of merchandise-----                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| service-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| quality of merchandise-----                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Golf Courses (overall)</b> -----                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| locations-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| service-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Activities &amp; Attractions (overall)</b> -----         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| exciting-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| variety of choices-----                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| service-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Transportation by bus, taxi, trolley (overall)</b> ----- | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| convenience-----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| cleanliness and comfort-----                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| efficiency-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| value for your money-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Airports (overall)</b> -----                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| signage -----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| cleanliness and comfort-----                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ease of getting around-----                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| availability of food-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| availability of shopping-----                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| friendliness of workers-----                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Parks &amp; Beaches (overall)</b> -----                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| security-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| facility -----  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| cleanliness and comfort-----                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



5b. How satisfied were you with public sidewalks...

|  | Very Satisfied           | Somewhat Satisfied       | Somewhat Dissatisfied    | Not Satisfied At all     | Not Applicable           |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Cleanliness                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Maintenance                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Attractiveness of landscaping                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ease of passage                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Lighting                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Behavior of vendors, handbillers, performers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Signage                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6a. What was the primary purpose of your most recent trip to Hawai'i?

6b. And what, if any, was the secondary purpose of your most recent visit?

|   | Q6a.<br>Primary Purpose<br>(one answer only) | Q6b.<br>Secondary Purpose |
|---|--|---------------------------|
| a. Vacation -----                                     | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| b. Attend a business meeting or conduct business----- | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| c. Attend a convention, conference or seminar-----    | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| d. Visit friends or relatives-----                    | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| e. Get married-----                                   | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| f. Attend/participate in a wedding-----               | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| g. Honeymoon-----                                     | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| h. Attend/participate in a sporting event-----        | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| i. Attend/participate in a cultural event-----        | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| j. Medical treatment-----                             | <input type="checkbox"/>                     | <input type="checkbox"/>  |
| k. Other (please specify) _____                       | <input type="checkbox"/>                     | <input type="checkbox"/>  |

7a. Please check  if you visited any of the following places.

7b. If you stayed overnight or longer, how many nights did you stay at each place? (Write 0 if day only trip)

|  | Q7a.<br>Visited          | Q7b.<br>Number of Nights |                      |
|--|--------------------------|--------------------------|----------------------|
| Island of Oahu (Waikiki/Honolulu)----- | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |
| Island of Maui-----                    | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |
| Island of Moloka'i -----               | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |
| Island of Lana'i -----                 | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |
| Big Island of Hawai'i (Kona/Hilo)----- | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |
| Island of Kaua'i -----                 | <input type="checkbox"/> | <input type="text"/>     | <input type="text"/> |

8. For each Island you stayed overnight or longer, what type of accommodation did you stay in?

|                                   | Hotel                    | Condo                    | B&B                      | Time Share               | Private Home             | Cruise Ship              | Other                    |
|-----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Island of Oahu (Waikiki/Honolulu) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Maui                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Moloka'i                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Lana'i                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Big Island of Hawai'i (Kona/Hilo) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Kaua'i                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



9. For each island you visited on your most recent trip, which of the following did you see or do?

|   | O'ahu                    | Maui                     | Kaua'i                   | Big Island               | Moloka'i                 | Lana'i                   |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b><u>Sightseeing</u></b>                         |                          |                          |                          |                          |                          |                          |
| Helicopter ride or airplane tour-----             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Boat tour/submarine ride/whale watching-----      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Tour bus excursion-----                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Private limousine/van tour-----                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| On own (self-guided)-----                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>Recreation</u></b>                          |                          |                          |                          |                          |                          |                          |
| Swimming in the ocean/sunbathing/beach-----       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Surfing/body boarding-----                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Snorkeling/scuba diving-----                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Jet skiing, parasailing, windsurfing-----         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Golf-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Running/jogging/fitness walking-----              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Gym/health spa-----                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Backpacking/hiking/camping-----                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sports event or tournament-----                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>Entertainment</u></b>                       |                          |                          |                          |                          |                          |                          |
| Lunch/sunset/dinner/evening cruise-----           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Lounge act or stage show-----                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Nightclub/dancing/bar/karaoke-----                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Fine dining-----                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>Shopping</u></b>                            |                          |                          |                          |                          |                          |                          |
| Department stores-----                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Designer boutiques-----                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hotel stores-----                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Swap meet or flea markets-----                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Discount/outlet stores (e.g. Kmart, Waikale)----- | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Supermarkets-----                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Convenience stores-----                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Duty free stores-----                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>Cultural</u></b>                            |                          |                          |                          |                          |                          |                          |
| Historic site-----                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Museum/art gallery-----                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Polynesian show/luau-----                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Art/craft fair-----                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Festival (please specify) _____-----              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>Transportation</u></b>                      |                          |                          |                          |                          |                          |                          |
| Trolley-----                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Public bus-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Taxi/limousine-----                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rental car-----                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



10. Regarding your most recent trip, how would you rate your experience on each island you visited...

|  | Excellent                | Above Average            | Below Average            | Poor                     | Did not visit            |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Island of O'ahu (Waikiki/Honolulu) ----- | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Maui-----                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Moloka'i-----                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Lana'i-----                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Big Island of Hawai'i (Kona/Hilo)-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Kaua'i-----                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

11. And, how likely are you to recommend those islands as a vacation place to your friends and relatives...

|  | Very Likely              | Somewhat Likely          | Not Too Likely           | Not At All Likely        | Did not visit            |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Island of O'ahu (Waikiki/Honolulu) ----- | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Maui-----                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Moloka'i-----                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Lana'i-----                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Big Island of Hawai'i (Kona/Hilo)-----   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Island of Kaua'i-----                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

12. Thinking back to your most recent trip to Hawai'i, how far in advance of departure did you do each of the following? (Check one box in each row)

|  | Less than 1 month        | 1 to 3 months            | 4 to 6 months            | 7 to 9 months            | 10 to 12 months          | More than 1 year         |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| a. Decide to take vacation/pleasure trip | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. Decide to visit Hawai'i               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. Decide on which islands to visit      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| d. Set the date for the trip             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| e. Make airline reservations             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| f. Purchase tickets                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| g. Make accommodation reservations       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| h. Make rental car reservations          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| i. Purchase tour or attraction packages  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



13. Of the islands that you visited during your most recent trip, which ones did you decide to visit before your arrival in Hawai'i and which ones did you decide after your arrival?

|   | Decided Before<br>Arrival in Hawai'i | Decided After<br>Arrival in Hawai'i |
|---|--------------------------------------|-------------------------------------|
| Island of O'ahu (Waikiki/Honolulu)----- | <input type="checkbox"/>             | <input type="checkbox"/>            |
| Island of Maui -----                    | <input type="checkbox"/>             | <input type="checkbox"/>            |
| Island of Moloka'i-----                 | <input type="checkbox"/>             | <input type="checkbox"/>            |
| Island of Lana'i -----                  | <input type="checkbox"/>             | <input type="checkbox"/>            |
| Big Island of Hawai'i (Kona/Hilo)-----  | <input type="checkbox"/>             | <input type="checkbox"/>            |
| Island of Kaua'i-----                   | <input type="checkbox"/>             | <input type="checkbox"/>            |

14. Which of the following sources of information, if any, did you use when you were planning this trip? (Check all that apply)

- Travel agents
- Companies specializing in packaged tours
- Airline/commercial carriers
- Hotels or resorts
- Internet
- Hawai'i Visitors & Convention Bureau
- Magazines
- Newspapers
- Books
- Advice from friends or relatives
- Personal experience from past visit(s)

15. When planning this trip to Hawai'i, did you use a travel agent for any of the following? (Check all that apply)

- Help in deciding whether or not to travel to Hawai'i
- Help in choosing the airline
- Help in planning what to see and what to do
- Make airline reservations for you
- Make hotel or other lodging arrangements for you
- Make rental car reservations for you
- Help you purchase any tour or attraction packages

16. Which of the following describe the way you used the Internet to plan this trip? (Check all that apply)

- I never use the Internet
- Estimate the costs of things
- Find things to do
- Find a good hotel or place to stay
- Find good restaurants
- Find recreational activities
- Find evening activities
- Locate the best sightseeing places
- Find good shopping places
- Print out maps and directions
- Make airline reservations
- Make hotel/lodging arrangements
- Make rental car reservations

17. On this trip, did you travel: (Check all that apply)

- Alone
- With my spouse
- With my family including child(ren) under 18
- With other members of my family
- With my friends
- With my business associates
- With my girlfriend/boyfriend
- With same sex partner
- Other (specify) \_\_\_\_\_



18. Not counting this trip to Hawai'i, how many vacations and overnight pleasure trips have you taken in the past 3 years?

- 1 trip
- 2-4 trips
- 5-9 trips
- 10 or more trips

19. Not counting this trip to Hawai'i, have you vacationed more than 1,000 miles from your home in the past 3 years?

- Yes
- No

20. Did you ever live in Hawai'i before?

- Yes
- No

21. Do you have friends and/or relatives who live in Hawai'i?

- Yes
- No

22. Do you own property in Hawai'i?

- Yes, I own timeshare units
- Yes, I own other types of property
- No

23. Please indicate your highest level of educational training:

- No high school
- Some high school
- High school graduate
- Some college
- Associates (2 year) degree
- College graduate (4 year)
- Post graduate degree
- Vocational/technical

24. Which of the following categories includes your household's total annual income from all sources before taxes for 2002?

- Up to \$15,000
- \$15,000 to \$24,999
- \$25,000 to \$29,999
- \$30,000 to \$34,999
- \$35,000 to \$39,999
- \$40,000 to \$44,999
- \$45,000 to \$49,999
- \$50,000 to \$69,999
- \$70,000 to \$99,999
- \$100,000 to \$124,999
- \$125,000 to \$149,999
- \$150,000 or more

25. What is your age?

|  |  |
|--|--|
|  |  |
|--|--|

26. What is your gender?

- Male
- Female

27. What is your employment status?

- Working
- Retired
- Student
- Homemaker
- Other

28. On your most recent trip, what airport did you first arrive in Hawai'i?

- Honolulu Airport on O'ahu
- Kahului Airport on Maui
- Kona Airport on Hawai'i
- Hilo Airport on Hawai'i
- Lihu'e Airport on Kaua'i
- Lana'i Airport on Lana'i





29. Regarding the first airport you arrived at, how would you rate the quality of the airport?

- Excellent
- Above average
- Below average
- Poor

30. When you arrived at the airport, did it make you feel like you were in Hawai'i?

- Yes
- No

31. After you arrived at the airport, did you immediately take another flight to another island?

- Yes
- No

32. The safety of our visitors is important to us. We would like to know if you experienced any of the following while in Hawai'i?

- Wallet/purse/valuables stolen
- Room was vandalized/robbed
- Car was vandalized/robbed
- Physical violence/harm
- Solicited by prostitutes
- Solicited by drug dealers
- Received parking or other auto violations
- None of the above

33. And finally, how much did you and the immediate members of your travel party spend on their trip to Hawai'i? Please include all shopping, dining, lodging, airfare and all other spending.

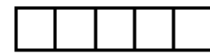
- Less than \$1,000
- \$1,000 to \$1,999
- \$2,000 to \$2,999
- \$3,000 to \$3,999
- \$4,000 to \$4,999
- \$5,000 to \$5,999
- \$6,000 to \$6,999
- \$7,000 to \$7,999
- \$8,000 to \$8,999
- \$9,000 to \$9,999
- More than \$10,000

MAHALO FOR YOUR KOKUA (thank for your help).  
Your feedback is important and your opinion counts. Please return the completed survey in the postage-paid envelope as soon as possible.

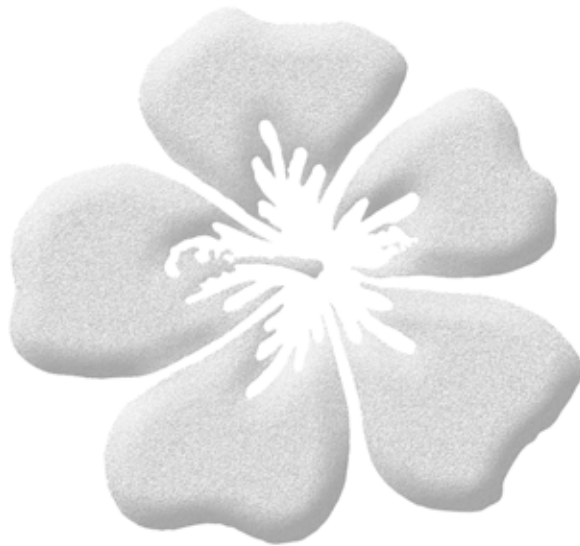
*Hope to see you in Hawai'i again soon.*



Visitor Survey 2003Q1



page 8 of 8



State of Hawaii  
Department of Business, Economic Development & Tourism  
Research & Economic Analysis Division