

# Visitor Satisfaction Study

## 2019 ANNUAL REPORT

Prepared for:  
Hawai'i Tourism Authority

# METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major market areas (MMAs) who recently completed a trip to Hawai'i. The sampled MMAs include: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Europe, Oceania, China and Korea.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	9,998	.98	18.77%
<b>U.S. East</b>	9,520	1.00	17.24%
<b>Japan</b>	6,652	1.20	47.47%
<b>Canada</b>	6,420	1.22	30.97%
<b>Europe</b>	1,779	2.32	24.44%
<b>Oceania</b>	2,316	2.04	25.83%
<b>China</b>	1,241	2.78	31.33%
<b>Korea</b>	1,362	2.66	34.68%
<b>All MMAs</b>	39,288	.49	23.48%

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

## METHODOLOGY – OVERALL (cont.)

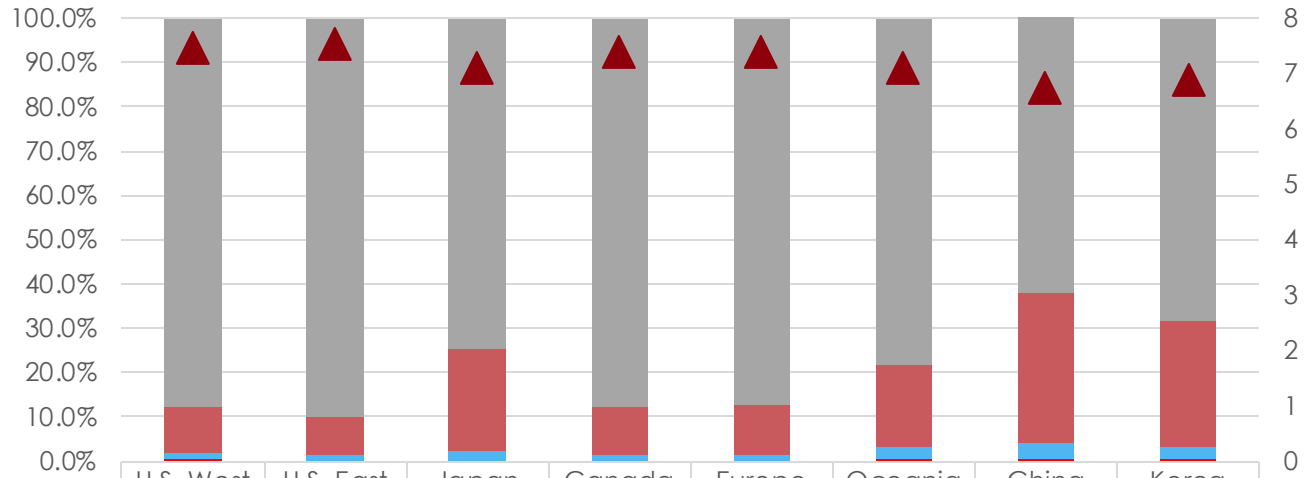
Monthly samples of visitors who stayed for at least two days were drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data was also collected via intercept surveys at the Daniel K. Inouye International Airport, Ellison Onizuka Kona International Airport and Kahului Airport using iPad tablets among departing Chinese, Japanese and Korean visitors. Data collected via email and from the iPad intercept surveys were merged to form a single database for analysis.

Collected data was statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data was statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Data from all MMAs were reported as weighted data based on weights generated for 2019 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

# SECTION – VISITOR SATISFACTION

# OVERALL SATISFACTION – MOST RECENT VISIT

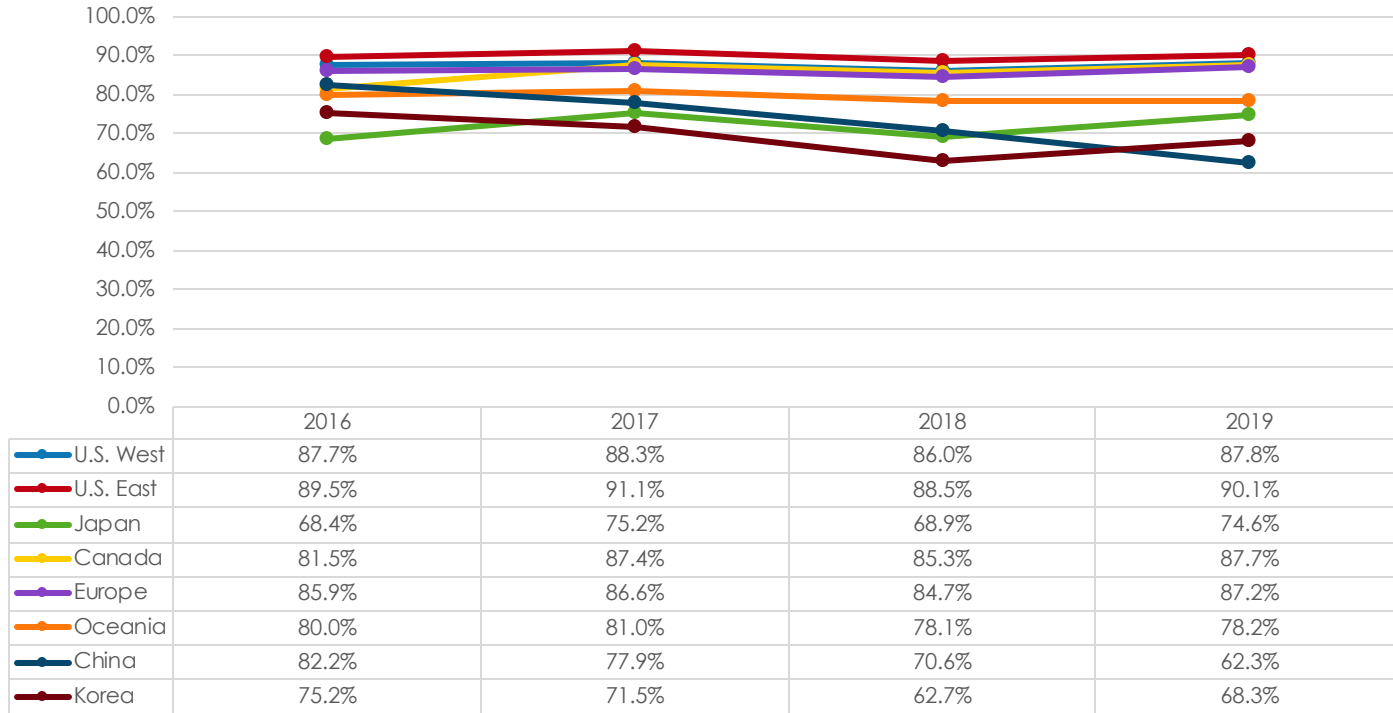
8-pt Rating Scale  
8=Extremely Satisfied / 1=Not Satisfied at All



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Extremely satisfied (7-8)	87.8%	90.1%	74.6%	87.7%	87.2%	78.2%	62.3%	68.3%
■ Somewhat satisfied (5-6)	10.4%	8.6%	23.3%	11.0%	11.5%	18.6%	33.9%	28.4%
■ Somewhat dissatisfied (3-4)	1.5%	1.1%	2.0%	1.1%	1.1%	2.7%	3.4%	2.8%
■ Not at all satisfied (1-2)	0.3%	0.2%	0.1%	0.2%	0.2%	0.5%	0.5%	0.4%
BASE	9,998	9,520	6,652	6,420	1,779	2,316	1,241	1,362
▲ MEAN	7.45	7.52	7.09	7.40	7.38	7.10	6.74	6.89

# OVERALL SATISFACTION – MOST RECENT VISIT

## TRACKING – TOP BOX “EXTREMELY SATISFIED” (7-8)



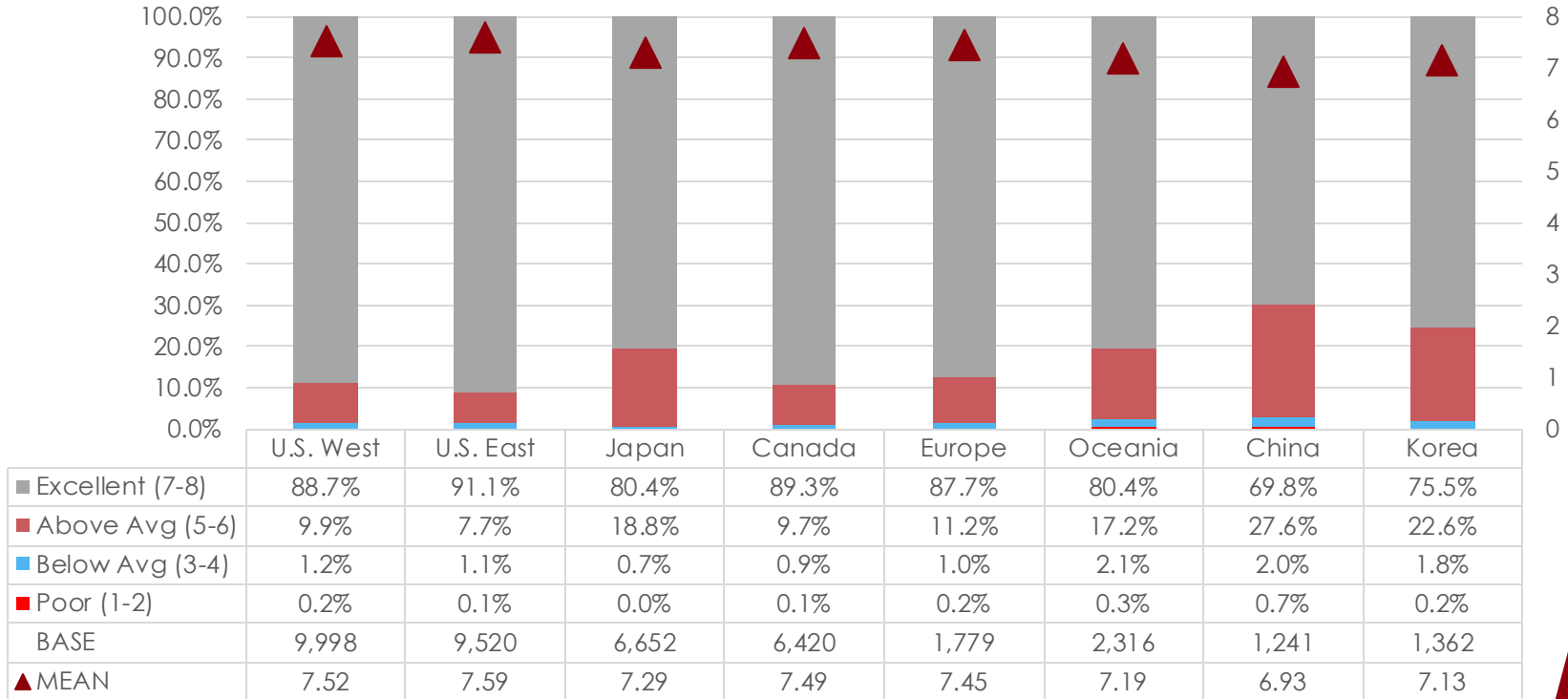
# OVERALL SATISFACTION – MOST RECENT VISIT

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger visitors under the age of 35 from the following visitor markets were more satisfied with their trip than older visitors, particularly seniors: U.S. West, U.S. East, Canada, and Japan.
- Female visitors from the following visitor markets gave higher satisfaction score than their male counterparts: U.S. West, U.S. East, Canada, and Oceania.
- Visitors from Japan and China who visited multiple islands during their trip to Hawai'i expressed higher satisfaction scores compared to visitors from these markets whose trip consisted of visiting just a single island.
- First-time visitors to Hawai'i from U.S. West and U.S. East were more satisfied with their most recent trip than were repeat visitors from these two markets.
- Those traveling alone from U.S. West, U.S. East, and Japan were less satisfied with their trip compared to those traveling larger travel parties of two or more persons.

# SATISFACTION – STATE OF HAWAI‘I BY MMA

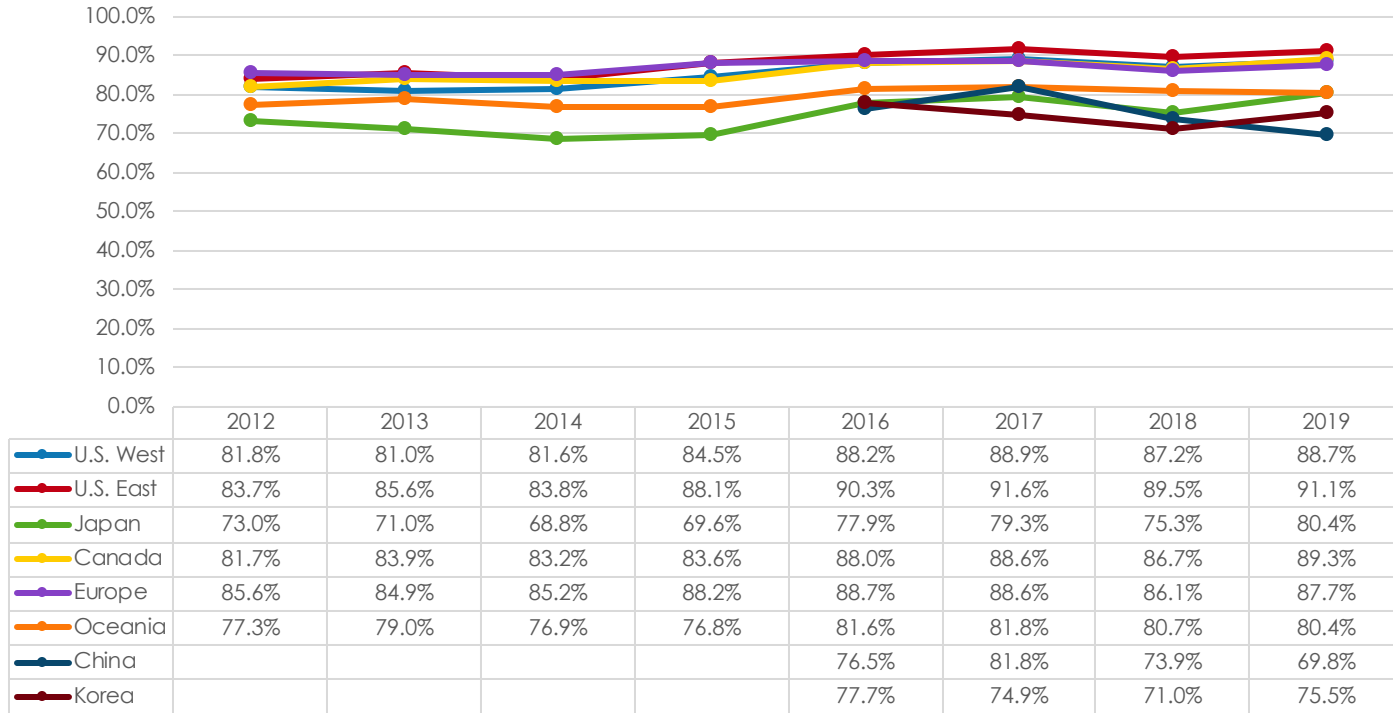
8-pt Rating Scale  
8=Excellent / 1=Poor





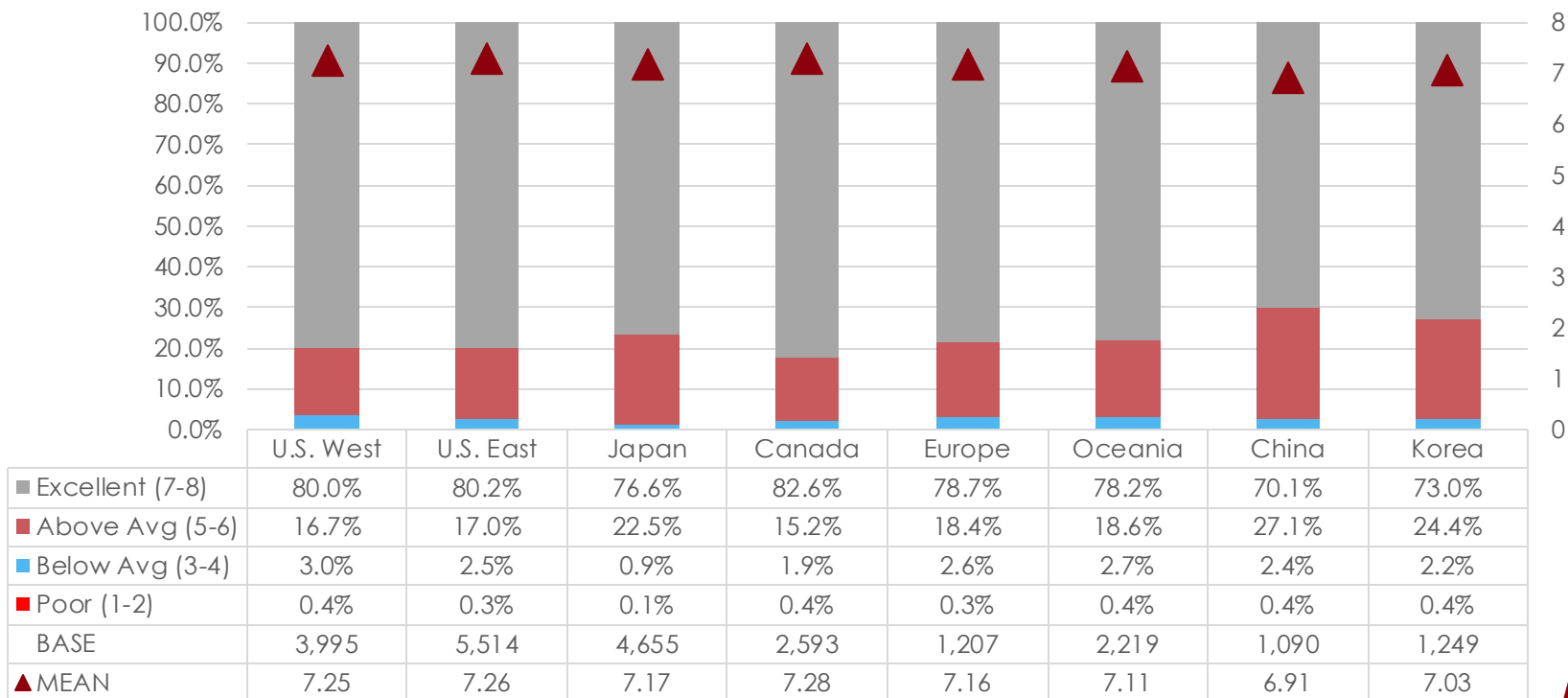
# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



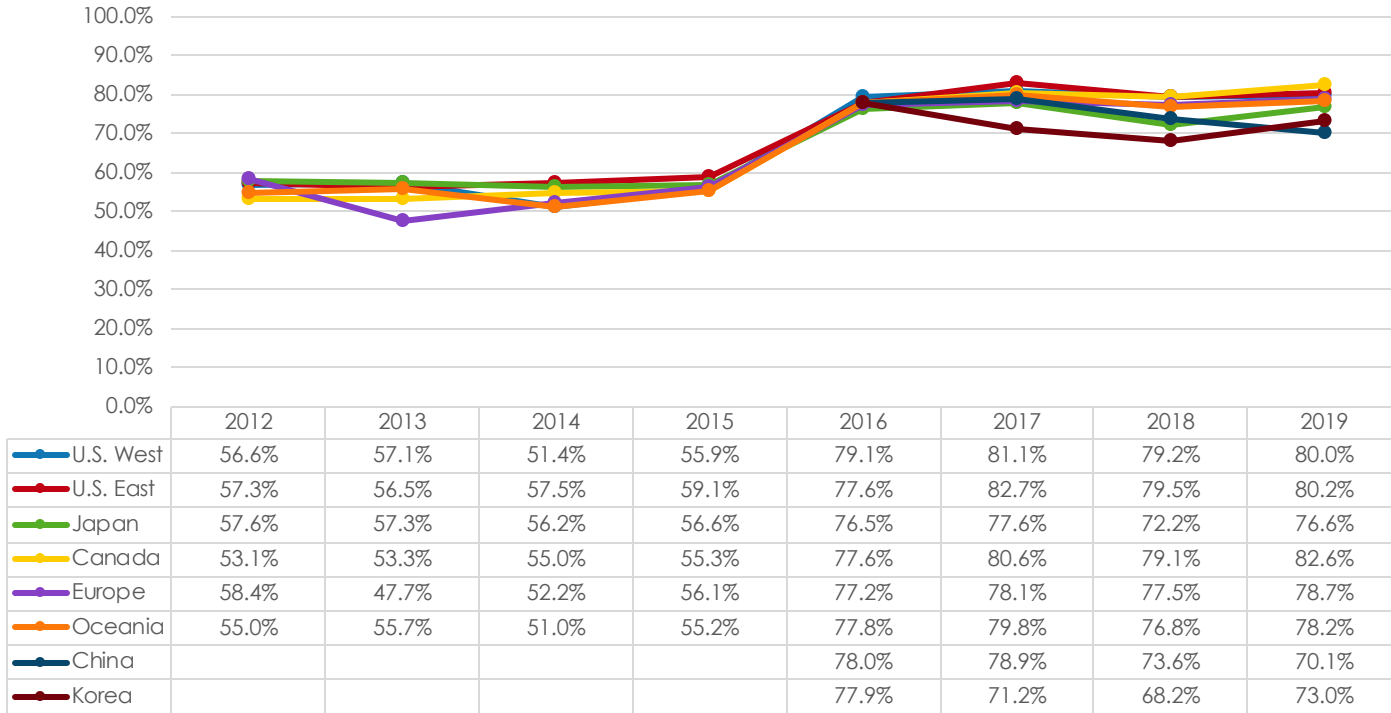
# SATISFACTION – O‘AHU BY MMA

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



# SATISFACTION – O‘AHU BY MMA

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



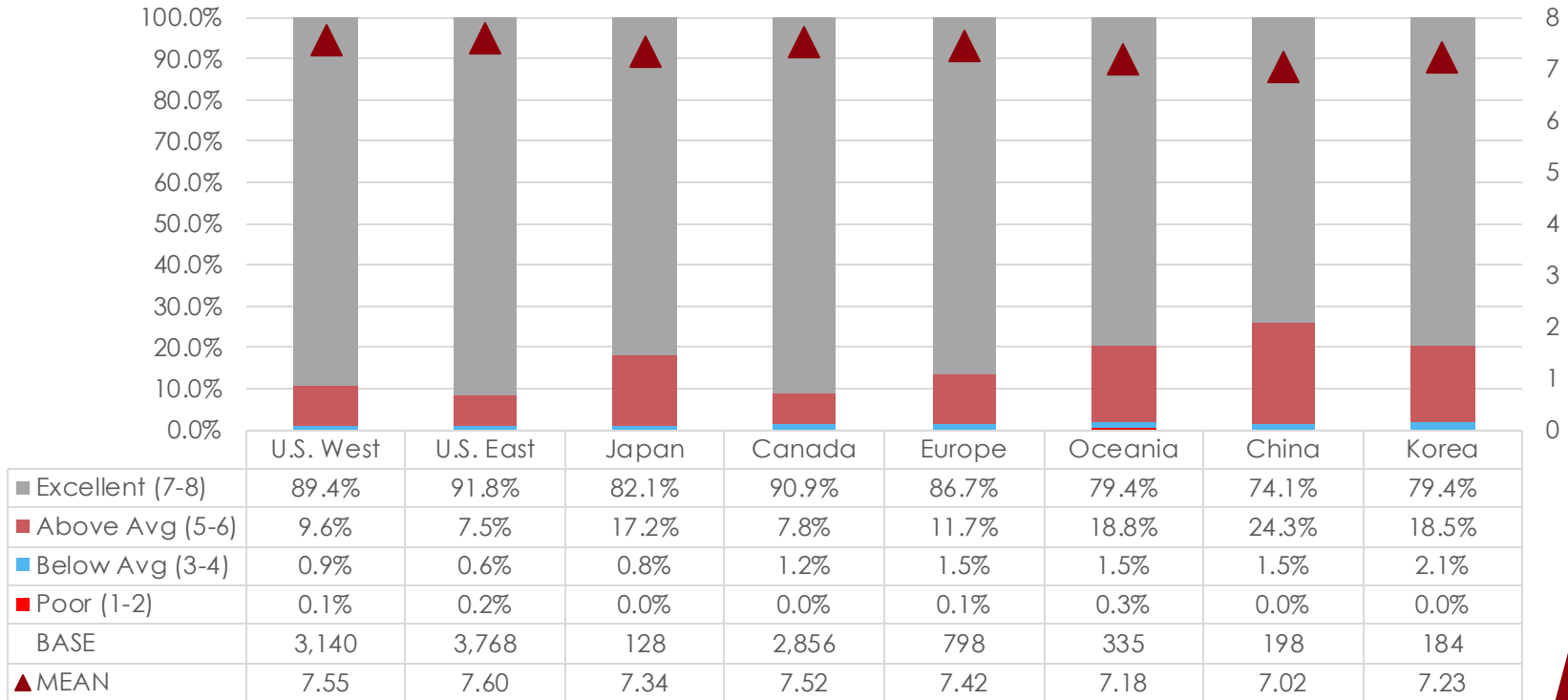
# SATISFACTION – O‘AHU BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger visitors, particularly those under the age of 35 from U.S. West, U.S. East, and Japan tended to be the most satisfied overall with their visit on O‘ahu.
- Visitors without a college degree from U.S. East, Japan, and Oceania were more satisfied with their stay on O‘ahu than visitors with a college degree from these particular markets.
- When segmented by gender, we find females from U.S. West, U.S. East, and Oceania were more satisfied with their visit to O‘ahu than were males from these visitor markets.
- With the exception of visitors from China, we find that those whose trip consisted of visiting only O‘ahu were more satisfied with their stay on the island than were those who stay also included a trip to one of the Neighbor Islands.

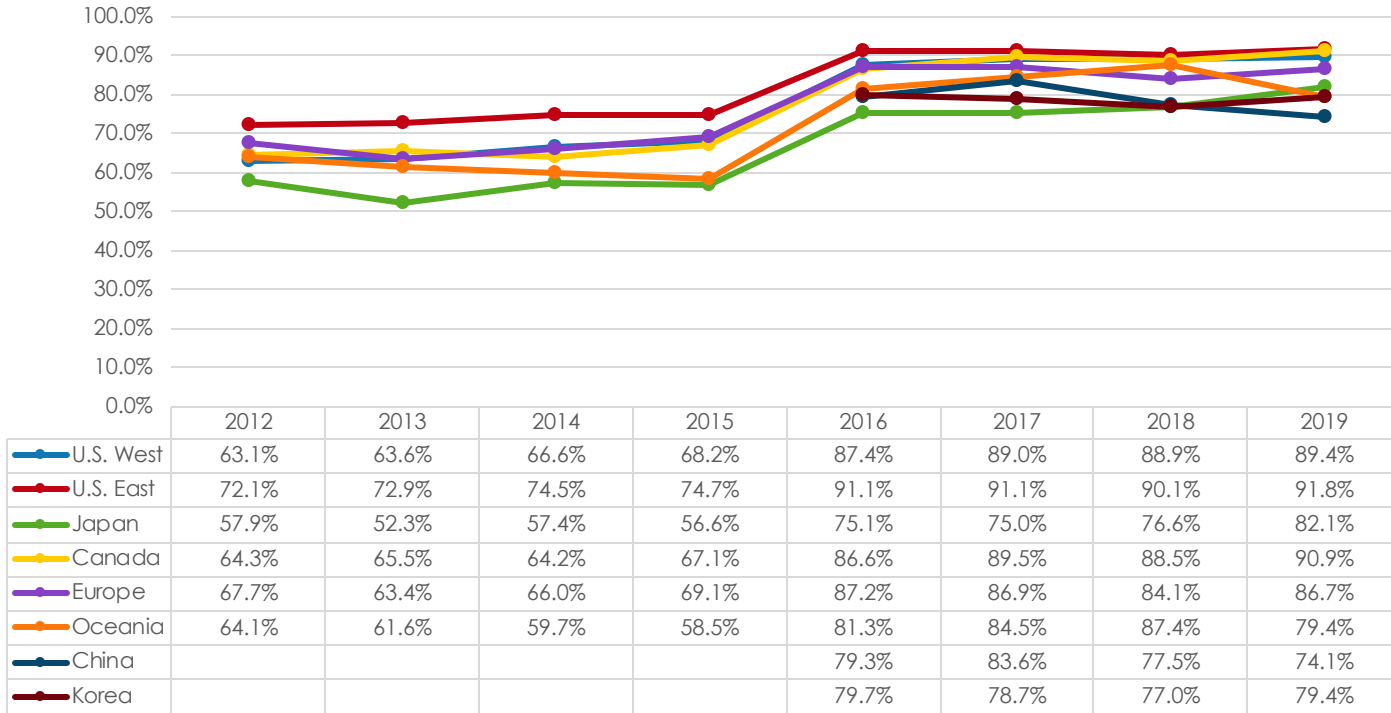
# SATISFACTION – MAUI BY MMA

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



# SATISFACTION – MAUI BY MMA

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



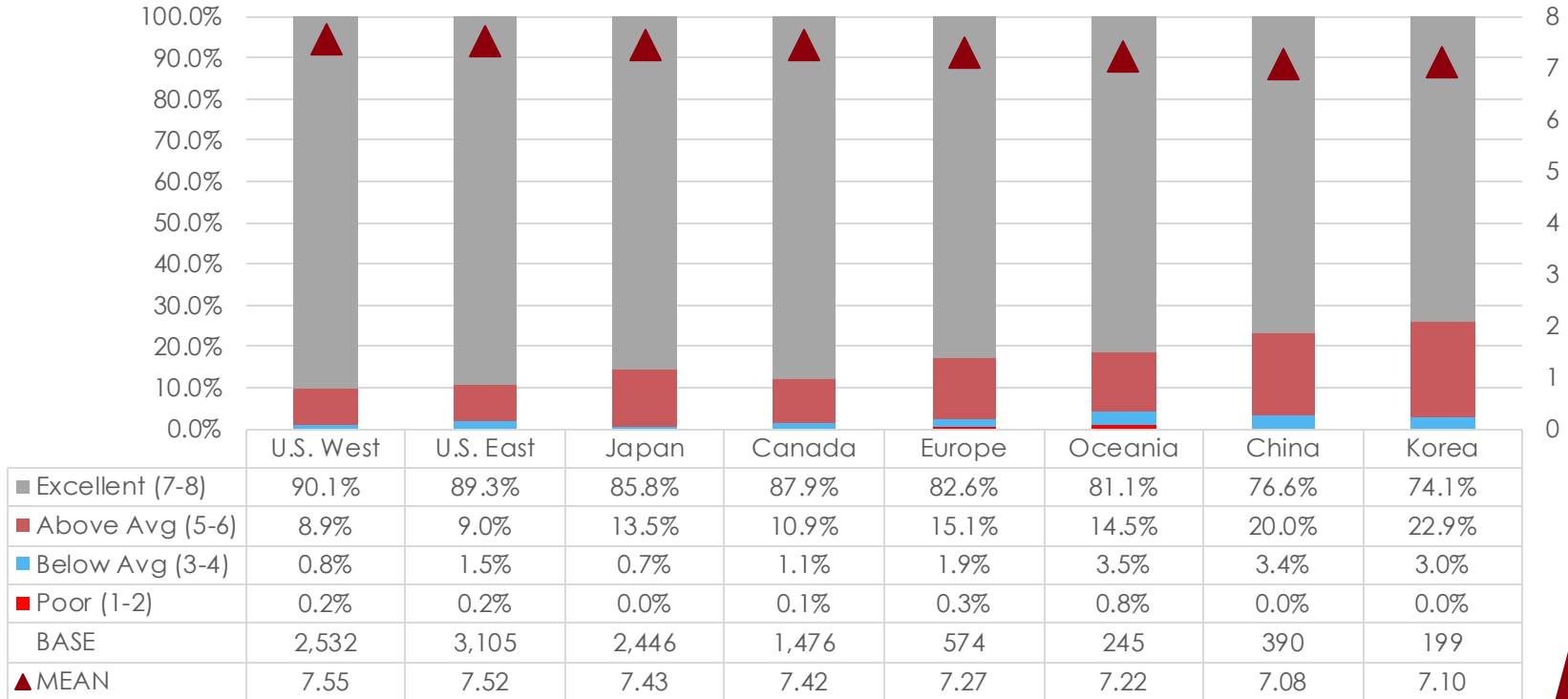
# SATISFACTION – MAUI BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors to Maui from U.S. West and U.S. East without a college degree had higher levels of satisfaction with their stay on the island compared to those with a college degree.
- Females from U.S. West, U.S. East, and Canada gave higher satisfaction scores for Maui than their male counterparts.
- Visitors from U.S. West, U.S. East, and Canada whose trip consisted entirely of visiting Maui have higher satisfaction scores when rating the island compared to those who also visited other Hawaiian Islands.

# SATISFACTION – HAWAI‘I ISLAND BY MMA

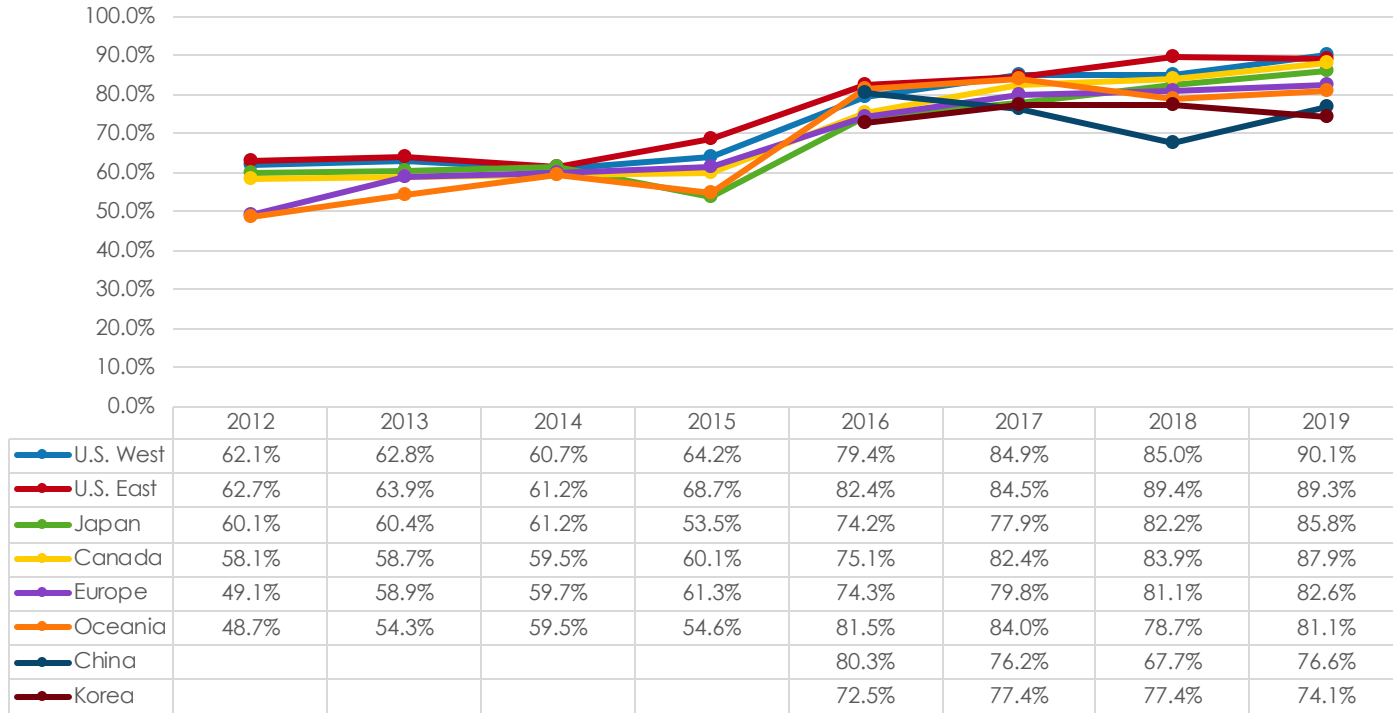
8-pt Rating Scale  
8=Excellent / 1=Poor





# SATISFACTION – HAWAI‘I ISLAND BY MMA

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



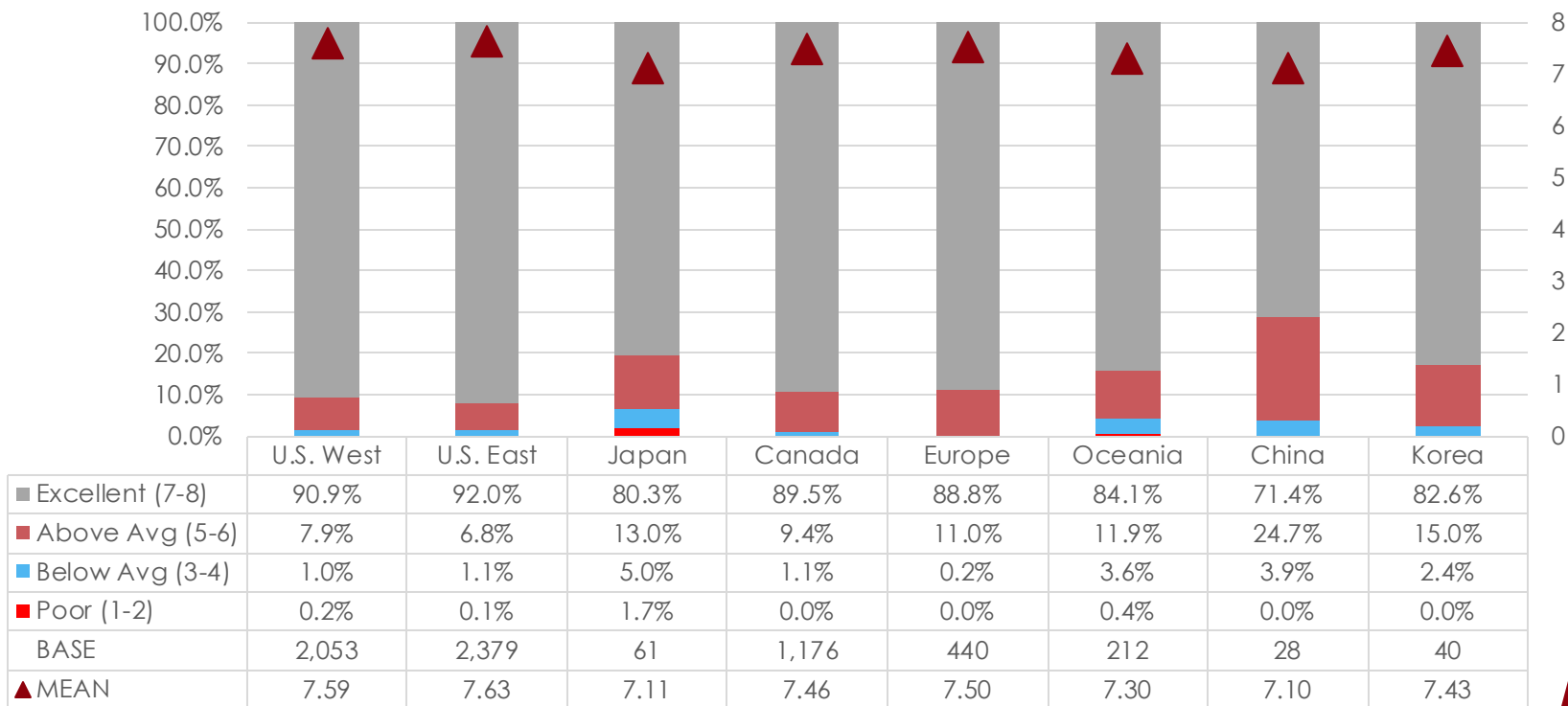
# SATISFACTION – HAWAI‘I ISLAND BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Among Japanese visitors, seniors were less satisfied with their stay on Hawai‘i Island than were younger segments from this visitor market.
- When segmented by gender, we find female visitors from U.S. West and U.S. East more satisfied with their stay on Hawai‘i Island than were males.
- Visitors from U.S. East whose trip was to Hawai‘i Island exclusively were more satisfied with their stay than those from this visitor market who also visited another Hawaiian Islands during their stay.
- Among Japanese visitors, those traveling in larger parties of three or more were the most satisfied with their trip to Hawai‘i Island.

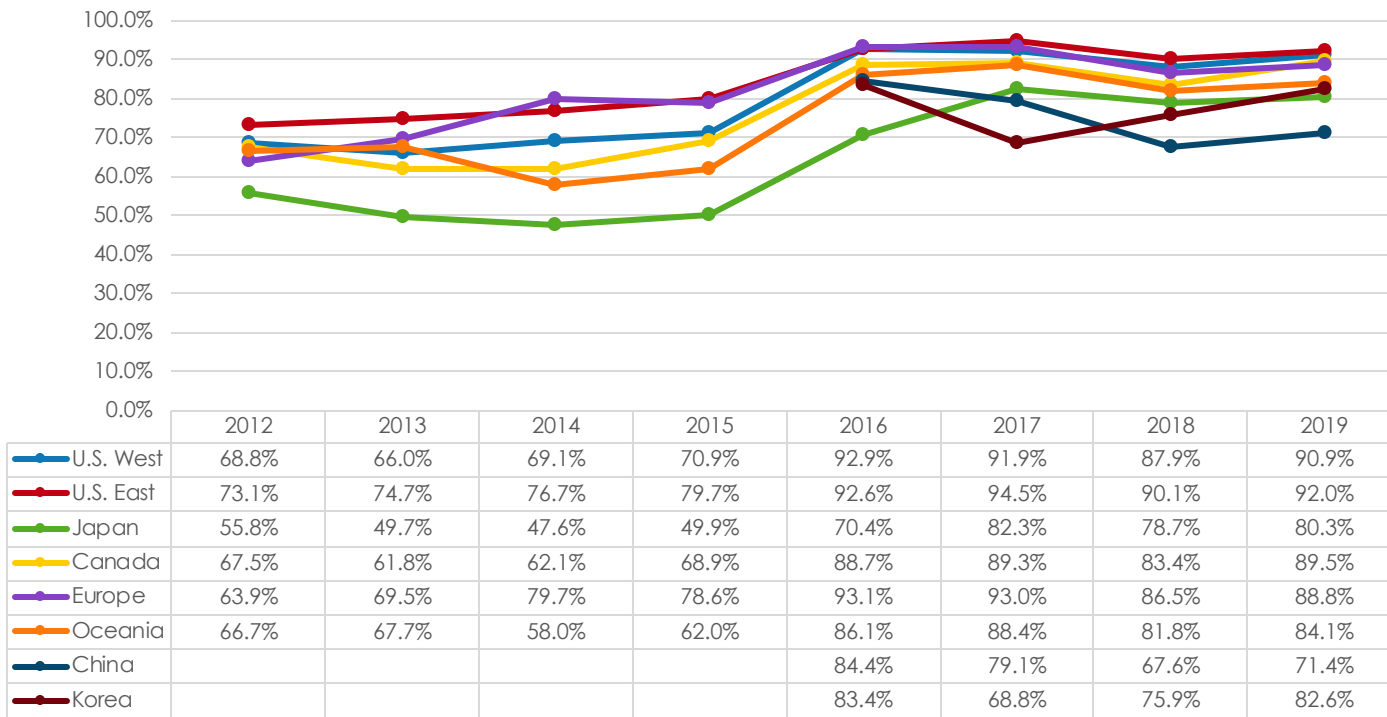
# SATISFACTION – KAUAI BY MMA

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



# SATISFACTION – KAUAI BY MMA

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



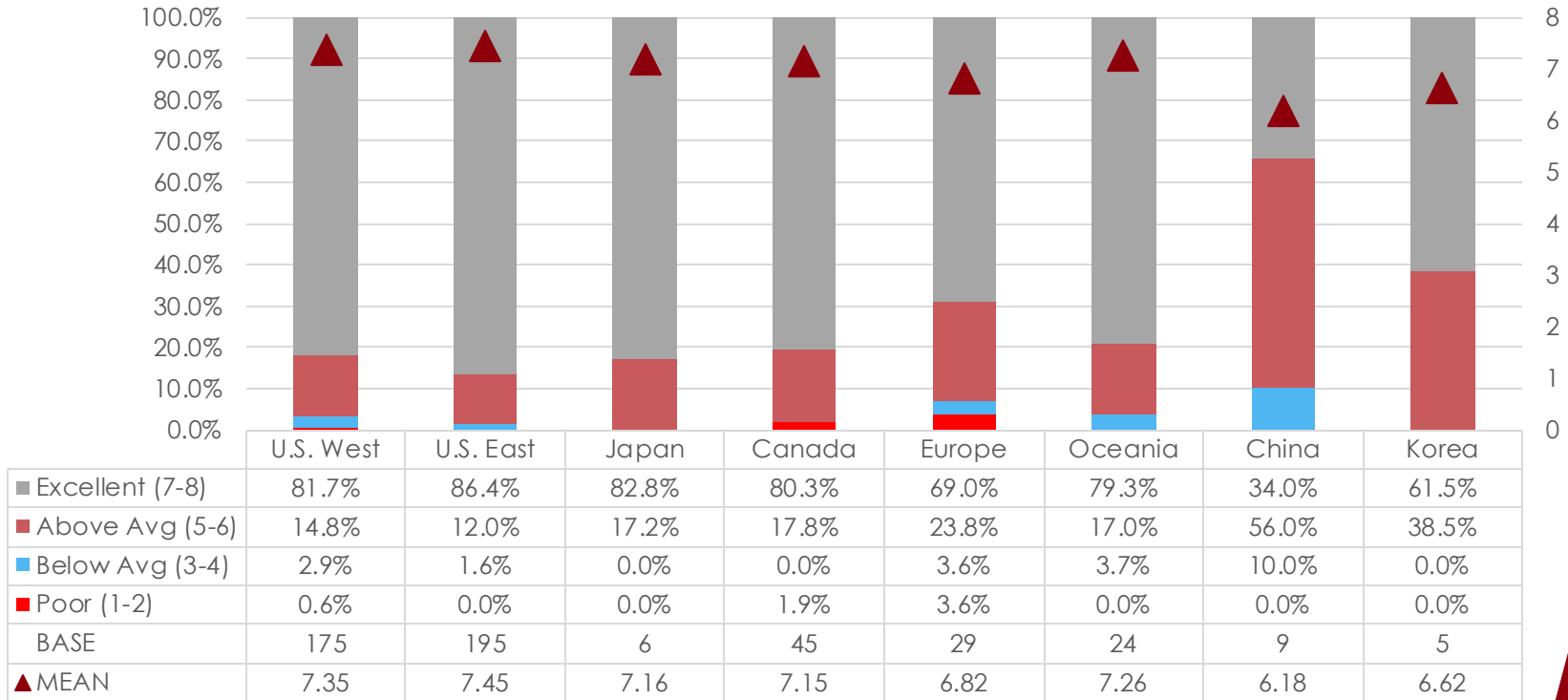
# SATISFACTION – KAUA‘I BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from U.S. West under the age of 50 were more satisfied with their visit to Kaua‘i.
- Female visitors from U.S. West and U.S. East were more satisfied with their visit to Kaua‘i than males.

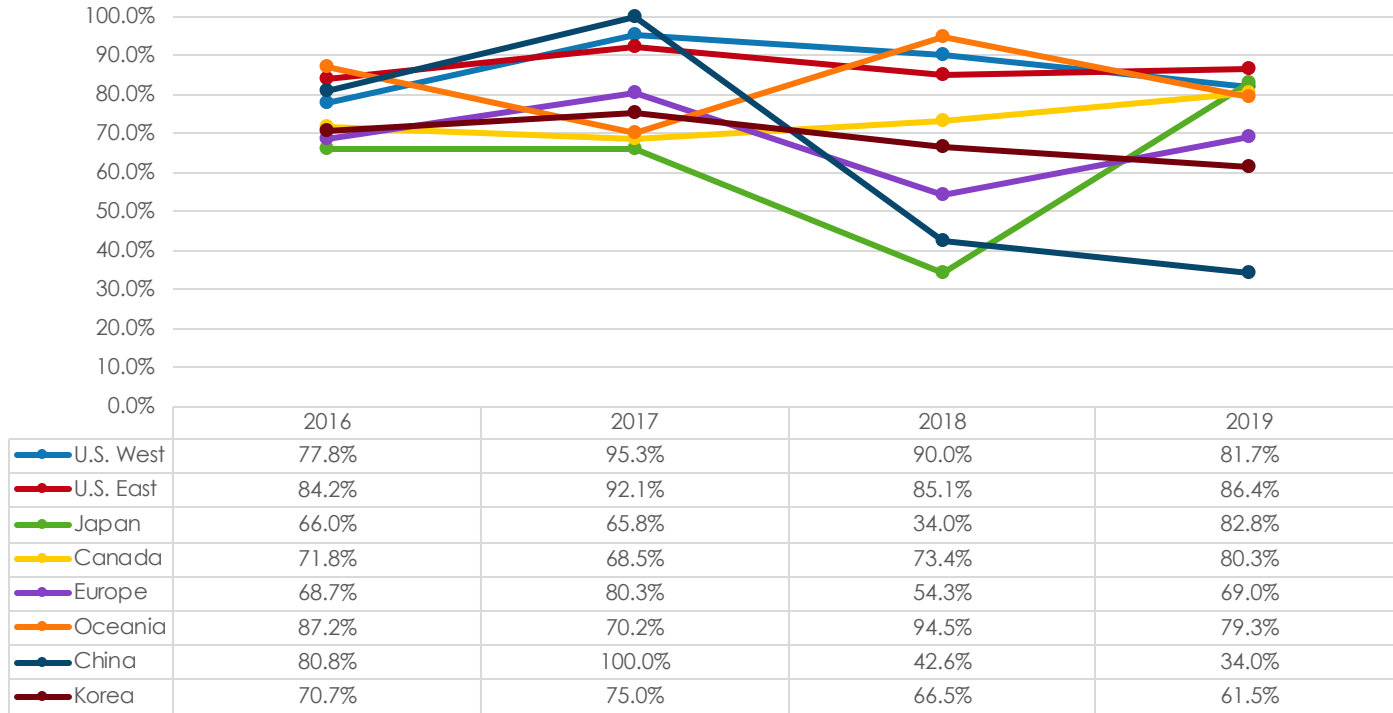
# SATISFACTION – MOLOKA‘I BY MMA

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



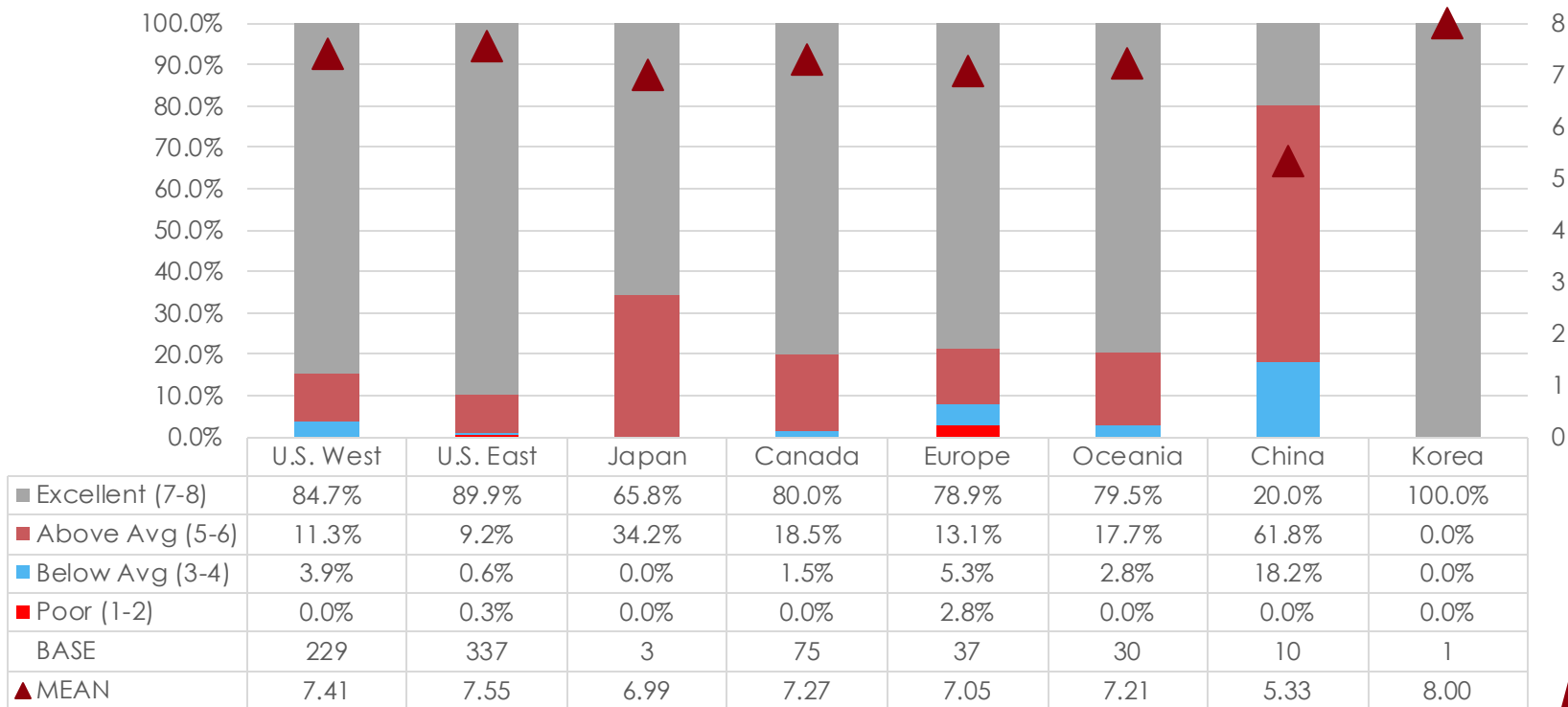
# SATISFACTION – MOLOKA‘I BY MMA

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



# SATISFACTION – LANAI BY MMA

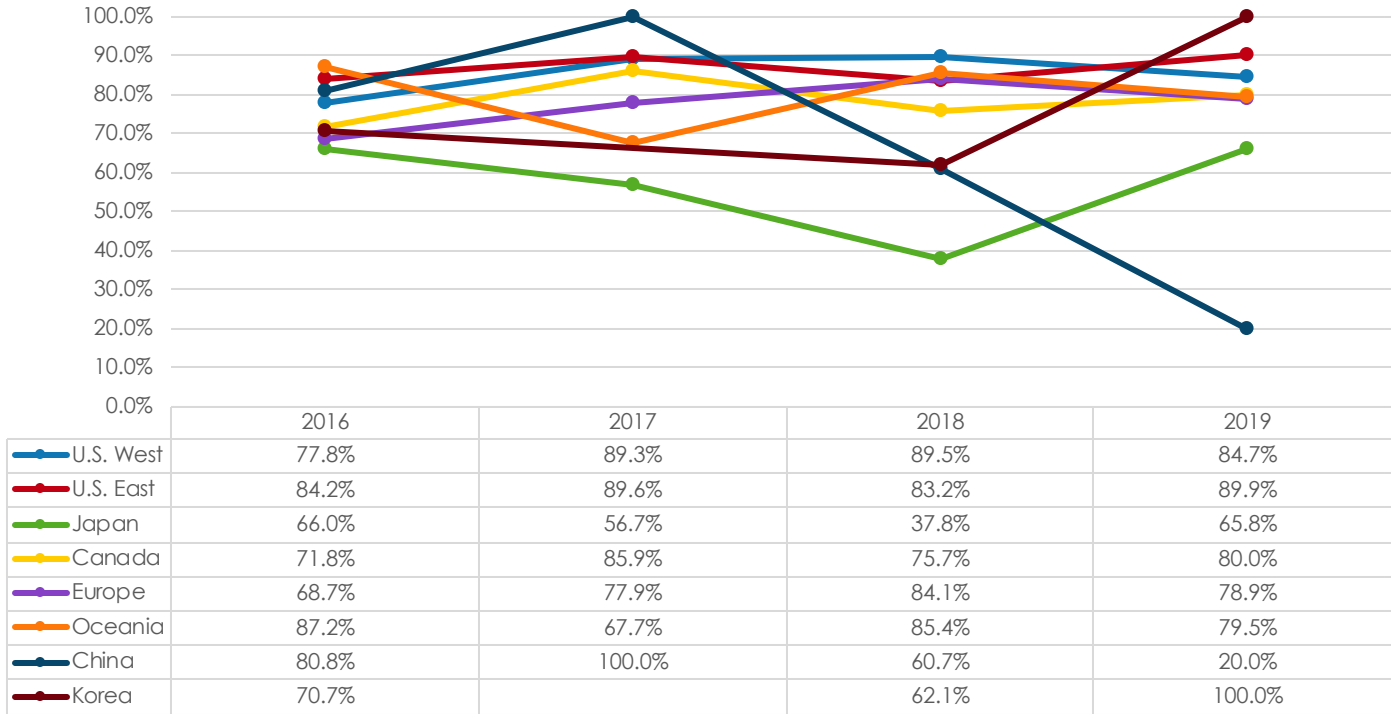
8-pt Rating Scale  
8=Excellent / 1=Poor





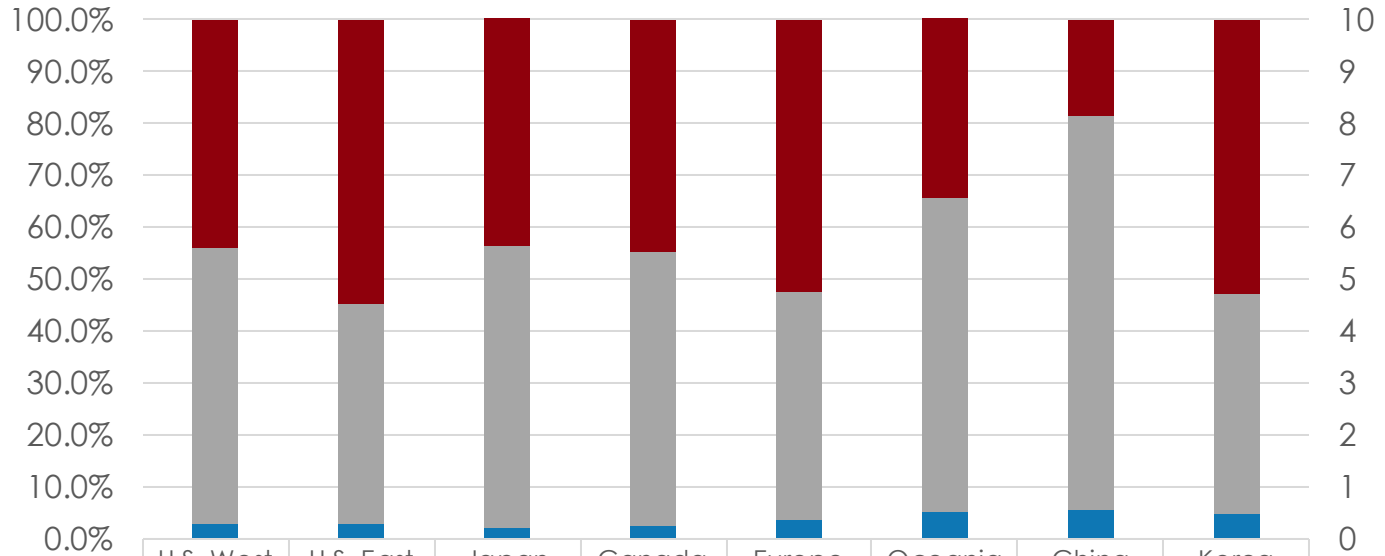
# SATISFACTION – LANAI BY MMA

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



# SECTION – TRIP EXPECTATIONS

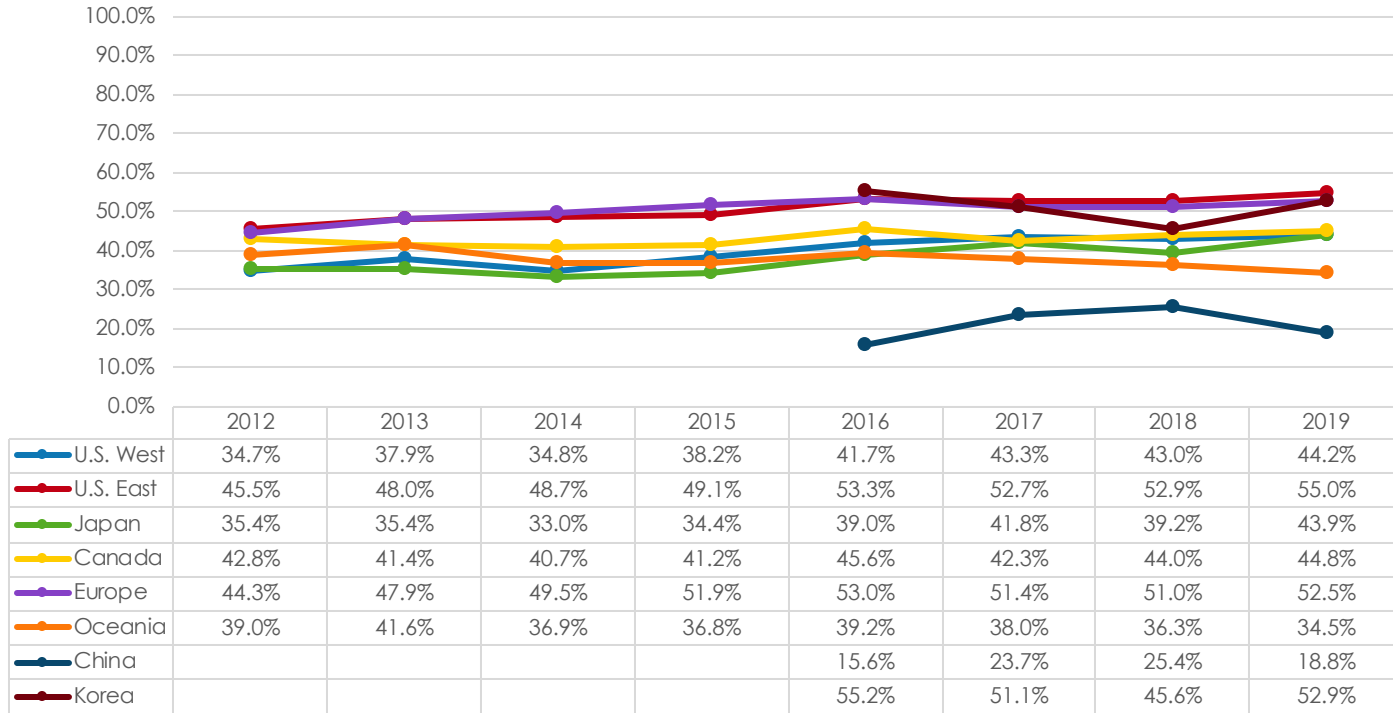
# HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Exceeded expectations	44.2%	55.0%	43.9%	44.8%	52.5%	34.5%	18.8%	52.9%
■ Met expectations	53.1%	42.2%	54.3%	52.7%	43.9%	60.3%	75.6%	42.3%
■ Did NOT meet expectations	2.7%	2.8%	1.9%	2.5%	3.6%	5.3%	5.6%	4.8%
BASE	9,998	9,520	6,652	6,420	1,779	2,316	1,241	1,362

# HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



# HAWAI'I TRIP EXPECTATIONS

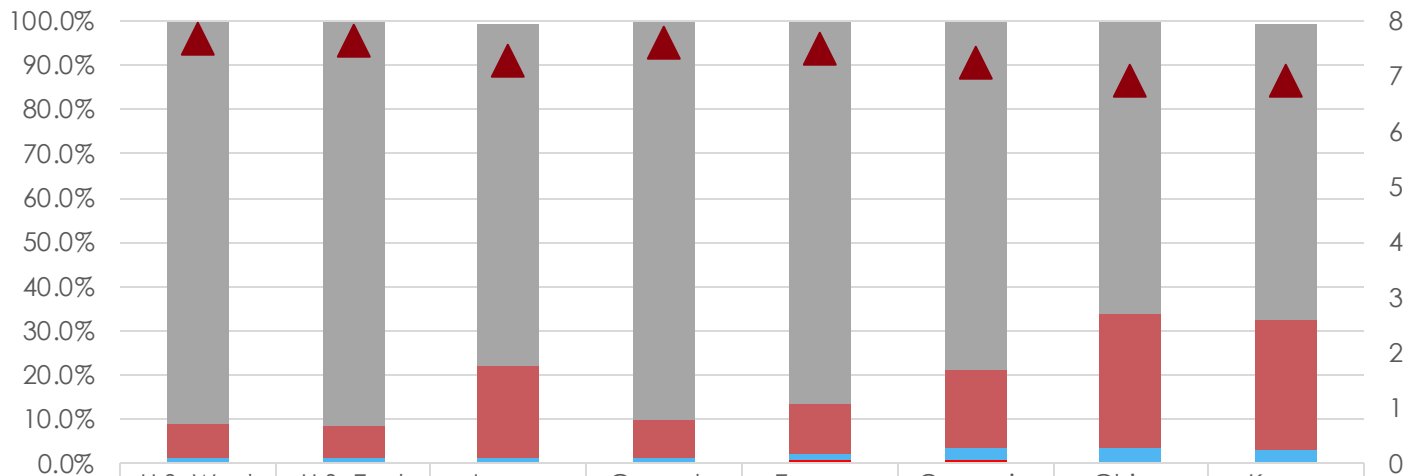
## COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

- Seniors were the least likely to respond that the trip exceeded their expectations in the following visitor markets: U.S. West, U.S. East, Japan, Canada, Europe, and Oceania.
- When segmented by gender, we find females more likely to respond that the trip exceeded their expectations in the following visitor markets: U.S. West, U.S. East, Japan, Canada, Europe, and Europe.
- Visitors whose trip included stops on multiple islands gave higher satisfaction scores in the following visitor markets: U.S. West, U.S. East, Japan, and China.
- Those in larger travel parties from U.S. West, U.S. East, and Japan gave higher scores when asked if this trip exceeded their expectations.

# SECTION – BRAND/ DESTINATION ADVOCACY

# BRAND/DESTINATION – ADVOCACY

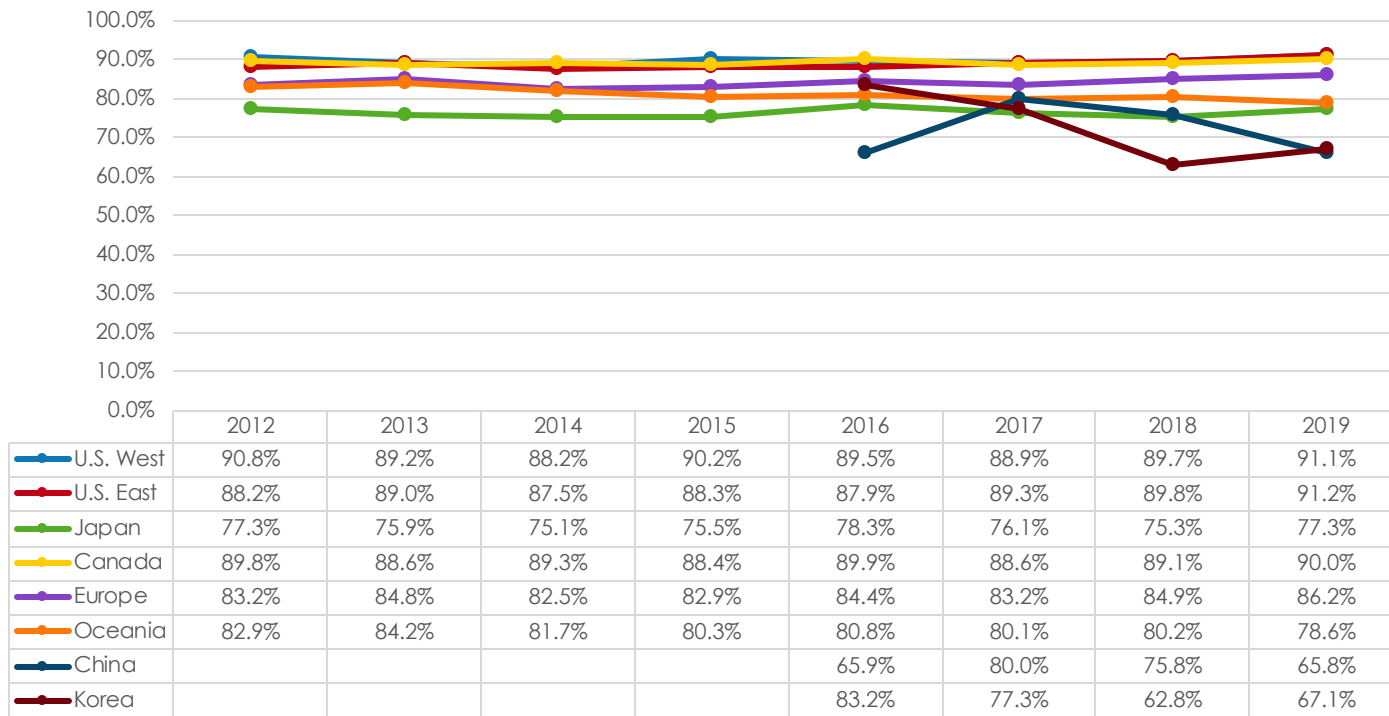
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	91.1%	91.2%	77.3%	90.0%	86.2%	78.6%	65.8%	67.1%
■ Somewhat likely (5-6)	7.5%	7.2%	20.9%	8.6%	11.1%	17.4%	30.4%	29.2%
■ Somewhat unlikely (3-4)	0.9%	1.1%	1.1%	0.9%	1.7%	2.7%	3.0%	2.9%
■ Very unlikely (1-2)	0.4%	0.4%	0.1%	0.5%	0.7%	1.1%	0.6%	0.2%
BASE	9,998	9,520	6,652	6,420	1,779	2,316	1,241	1,362
▲ MEAN	7.66	7.65	7.29	7.61	7.48	7.23	6.92	6.91

# BRAND/DESTINATION – ADVOCACY

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





# BRAND/DESTINATION – ADVOCACY

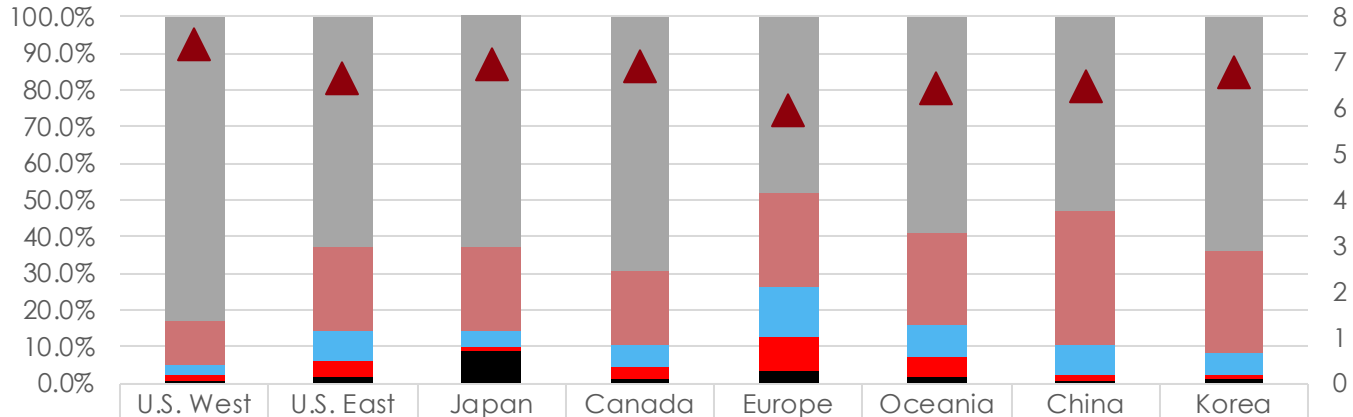
COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- The likelihood of recommending Hawai'i was lowest among seniors from the Japanese market.
- Visitors from Japan and Oceania without a college degree were more likely to recommend Hawai'i than visitors from these two markets with a college degree. Conversely the opposite was true among Chinese visitors where more educated travelers were more likely to be advocates for the state.
- Female visitors appeared to be stronger advocates for Hawai'i than male visitors from these markets: U.S. West, U.S. East, Japan, Oceania and Canada.
- Visitors from Japan and China who visited multiple islands during their stay were stronger advocates for the state compared to those whose trip consisted of visiting a single island.
- Repeat visitors from U.S. West, Japan, and Oceania were more likely to recommend Hawai'i to others than were first-time visitors from these markets.

# SECTION – BRAND/ DESTINATION LOYALTY

# LIKELIHOOD OF RETURN VISIT

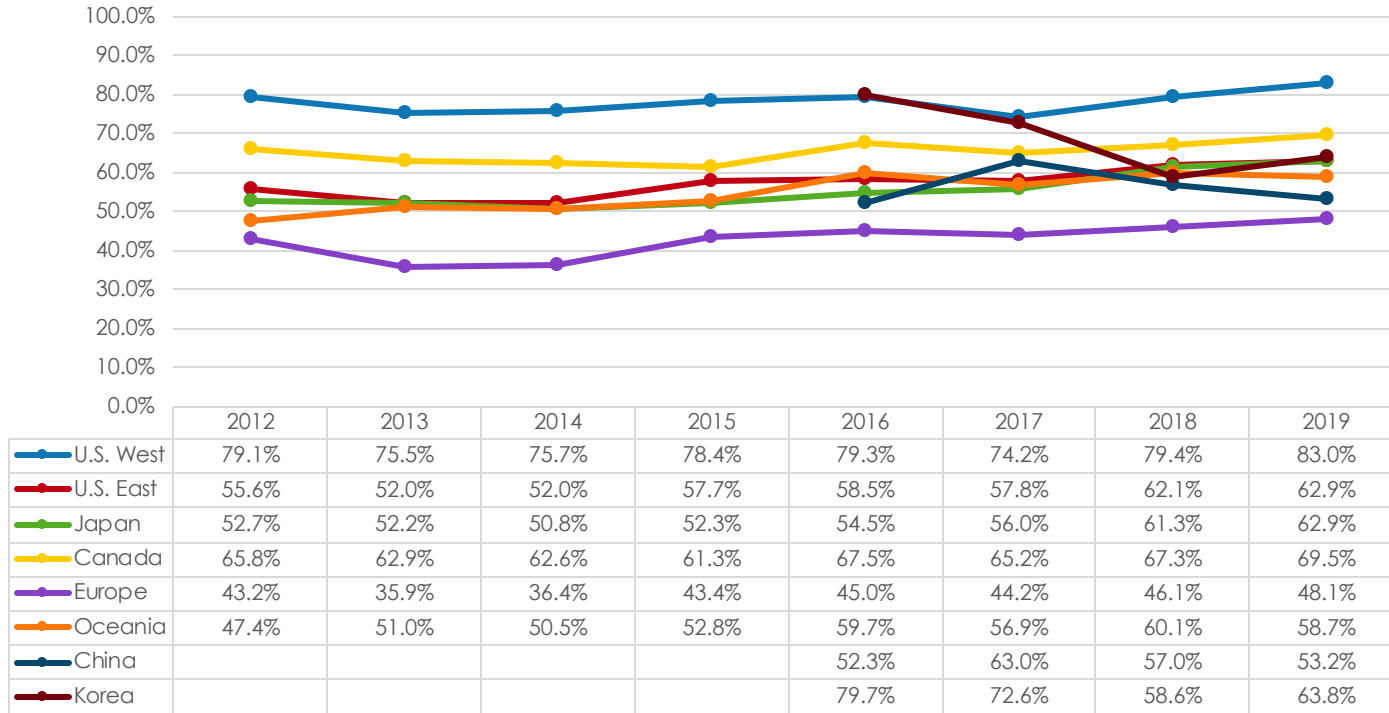
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	83.0%	62.9%	62.9%	69.5%	48.1%	58.7%	53.2%	63.8%
■ Somewhat likely (5-6)	12.2%	22.5%	23.2%	20.3%	25.5%	25.3%	36.6%	27.8%
■ Somewhat unlikely (3-4)	2.5%	8.4%	4.1%	5.7%	13.6%	9.0%	7.7%	6.1%
■ Very unlikely (1-2)	1.8%	4.3%	1.0%	3.4%	9.4%	5.3%	1.7%	1.2%
■ Not Sure	0.5%	1.8%	9.0%	1.2%	3.4%	1.7%	0.9%	1.2%
BASE	9,998	9,520	6,652	6,420	1,779	2,316	1,241	1,362
▲ MEAN	7.39	6.65	6.97	6.91	5.96	6.46	6.49	6.79

# LIKELIHOOD OF RETURN VISIT

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



# LIKELIHOOD OF RETURN VISIT

## COMPARISON OF MEANS REVEAL THE FOLLOWING:

- Those who were traveling by themselves versus in larger groups, were the most likely to express a desire to return from the following Markets: U.S. West, U.S. East, Japan, and Europe.
- In the U.S. West and U.S. East markets, more affluent visitors (\$100K+ household incomes) were the most likely to express a desire to return to Hawai'i.
- Females from Japan were more likely to indicate a desire to return to Hawai'i than their male counterparts.
- Females from U.S. West were also more likely to want to return to Hawai'i than male visitors.
- Those who visited just a single island were more likely to express a desire to return than visitors who visited multiple islands during their trip. This sentiment was especially true among the following markets: U.S. West, U.S. East, Canada, Europe, and Oceania.

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

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
47.4% Too expensive	44.8% Too expensive
<b>36.4% Want to go someplace new</b>	<b>41.6% Want to go someplace new</b>
23.7% Too crowded/ congested/ traffic	26.9% Too crowded/ congested/ traffic
22.7% Poor value	20.9% Too commercialized/ overdeveloped
18.8% Too commercialized/ overdeveloped	20.8% Poor value
16.1% Flight is too long	13.9% Five years is too soon
14.4% No reason to return/ nothing new	12.3% No reason to return/ nothing new
14.3% Five years is too soon	11.5% Flight is too long
14.2% Other financial obligations	

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

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
50.5% Too expensive	50.9% Too expensive
42.1% Flight is too long	43.1% Want to go someplace new
41.6% Want to go someplace new	43.0% Flight is too long
17.8% Five years is too soon	19.9% Five years is too soon
17.0% Other financial obligations	14.7% Other financial obligations
15.3% Too crowded/ congested/ traffic	14.3% Poor value
15.2% Poor value	12.1% Too crowded/ congested/ traffic
12.3% Too commercialized/ overdeveloped	
10.6% No compelling reason to return	

# UNLIKELY TO RETURN – TOP REASONS JAPAN

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
41.7% Too expensive	37.4% Too expensive
30.4% Want to go someplace new	29.3% Want to go someplace new
25.9% Flight is too long	29.3% Other financial obligations
25.8% Other financial obligations	27.0% Five years is too soon
24.2% Five years is too soon	22.5% Flight is too long



# UNLIKELY TO RETURN – TOP REASONS CANADA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
51.5% Too expensive	55.9% Too expensive
46.7% Want to go someplace new	49.4% Want to go someplace new
33.1% Flight is too long	36.0% Flight is too long
22.4% Five years is too soon	22.8% Five years is too soon
21.7% Poor value	20.6% Poor value
14.7% Too crowded/ congested/ traffic	14.3% Too commercialized/ overdeveloped
13.6% Other financial obligations	12.5% Other financial obligations
13.6% Too commercialized/ overdeveloped	12.2% Too crowded/ congested/ traffic
10.2% No compelling reason to return	10.2% No compelling reason to return

# UNLIKELY TO RETURN – TOP REASONS EUROPE

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
64.0% Flight is too long	61.7% Flight is too long
49.0% Too expensive	50.7% Too expensive
40.6% Want to go someplace new	38.1% Want to go someplace new
21.8% Five years is too soon	23.1% Five years is too soon
14.8% Too commercialized/ overdeveloped	13.1% Too commercialized/ overdeveloped
13.5% Poor value	11.9% Poor value
13.3% Other financial obligations	10.7% Other financial obligations

# UNLIKELY TO RETURN – TOP REASONS OCEANIA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
45.0% Want to go someplace new	47.4% Want to go someplace new
42.6% Too expensive	42.5% Too expensive
33.7% Poor value	29.7% Poor value
30.2% Too commercialized/ overdeveloped	27.0% Too commercialized/ overdeveloped
24.4% Too crowded/ congested/ traffic	19.1% Too crowded/ congested/ traffic
19.3% No reason to return/ nothing new	16.2% Five years is too soon
15.0% Flight is too long	13.9% Flight is too long
14.4% Five years is too soon	
10.9% Other financial obligations	

# UNLIKELY TO RETURN – TOP REASONS CHINA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
42.8% Flight is too long	51.3% Want to go someplace new
39.8% Too expensive	38.3% Too expensive
31.4% Want to go someplace new	36.8% Poor value
31.3% Five years is too soon	34.7% Flight is too long
25.7% Poor value	31.0% Five years is too soon
23.1% No reason to return/ Nothing new	24.8% No compelling reason to return
17.3% Too commercialized/ overdeveloped	

# UNLIKELY TO RETURN – TOP REASONS KOREA

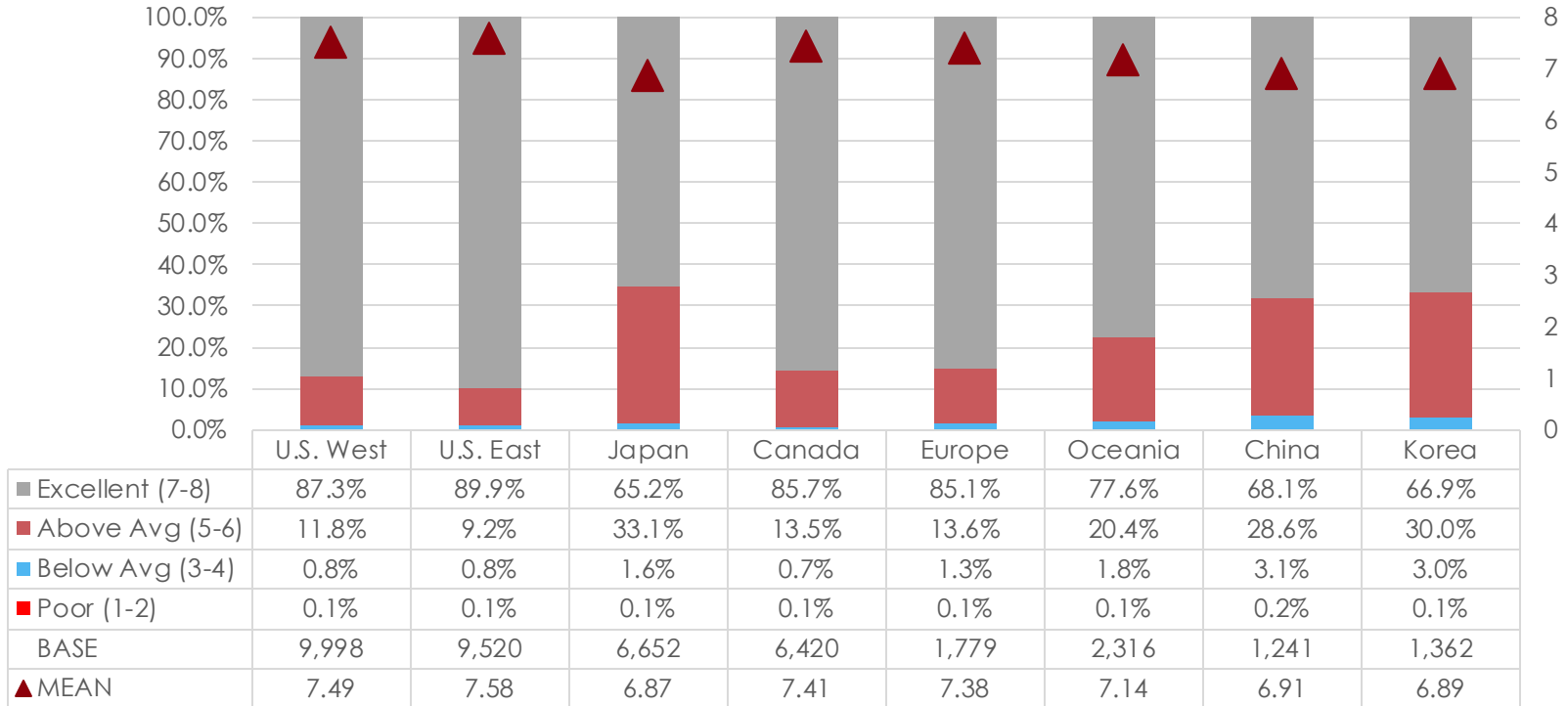
TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2019
56.1% Too expensive	66.7% Too expensive
35.2% Poor value	40.7% Poor value
31.7% Flight is too long	35.5% Flight is too long
28.3% No reason to return/ Nothing new	21.8% No reason to return
27.6% Want to go someplace new	21.5% Other financial obligations
27.0% Five years is too soon	19.8% Five years is too soon
16.8% Other financial obligations	16.8% Too crowded/ congested/ traffic
12.2% Too commercialized/ overdeveloped	16.3% Unfriendly people
11.6% Unfriendly people	13.9% Too commercialized/ overdeveloped
11.4% Poor service	11.8% Poor service
	11.1% Want to go someplace new

# SECTION – EXPERIENCES

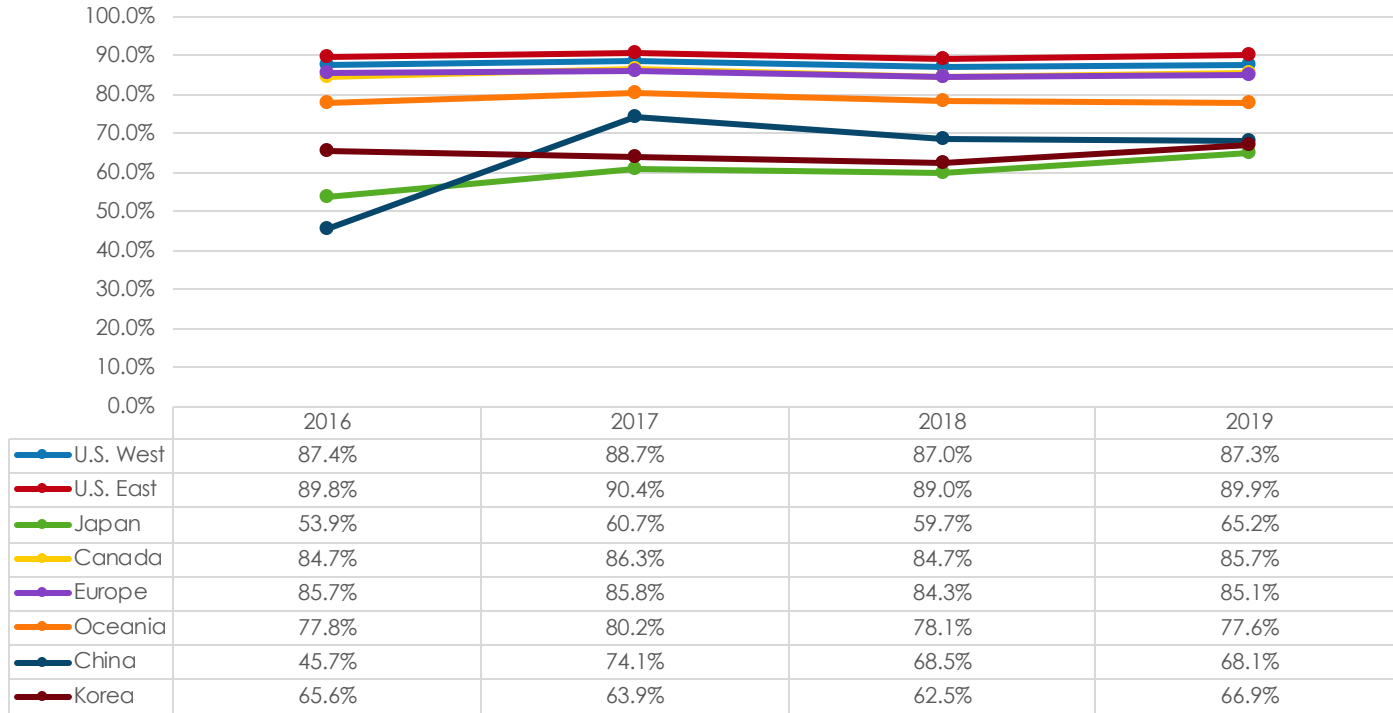
# OFFERING A VARIETY OF EXPERIENCES

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



# OFFERING A VARIETY OF EXPERIENCES

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





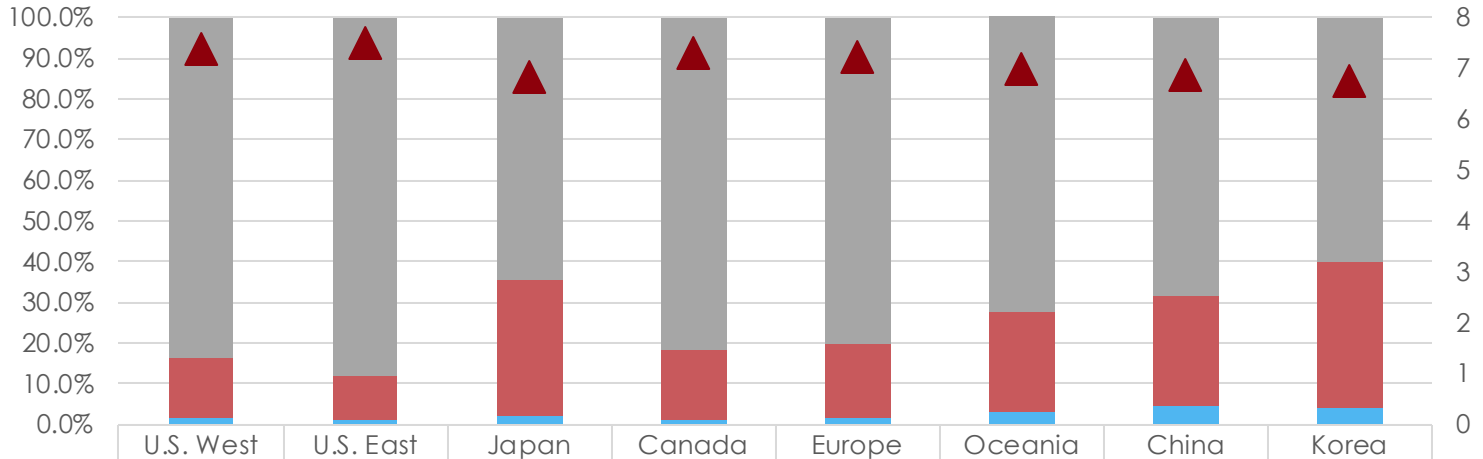
# OFFERING A VARIETY OF EXPERIENCES

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Among Japanese visitors, seniors were the least satisfied overall with the variety of experiences.
- Visitors without a college degree from Japan and Oceania were more satisfied with the variety of experiences than those with a college degree from these visitor markets.
- When the results were broken down by gender, we find females more satisfied than males among the following visitor markets: U.S. West, U.S. East, Canada, and Oceania.
- Visitors from U.S. West, U.S. East, Japan, Canada, and China whose trip included visits to multiple islands were more satisfied in this area than visitors from these markets whose trip consisted of visiting a single island.
- First-time visitors to Hawai'i from Japan gave higher satisfaction scores in this area than repeat visitors from Japan.

# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

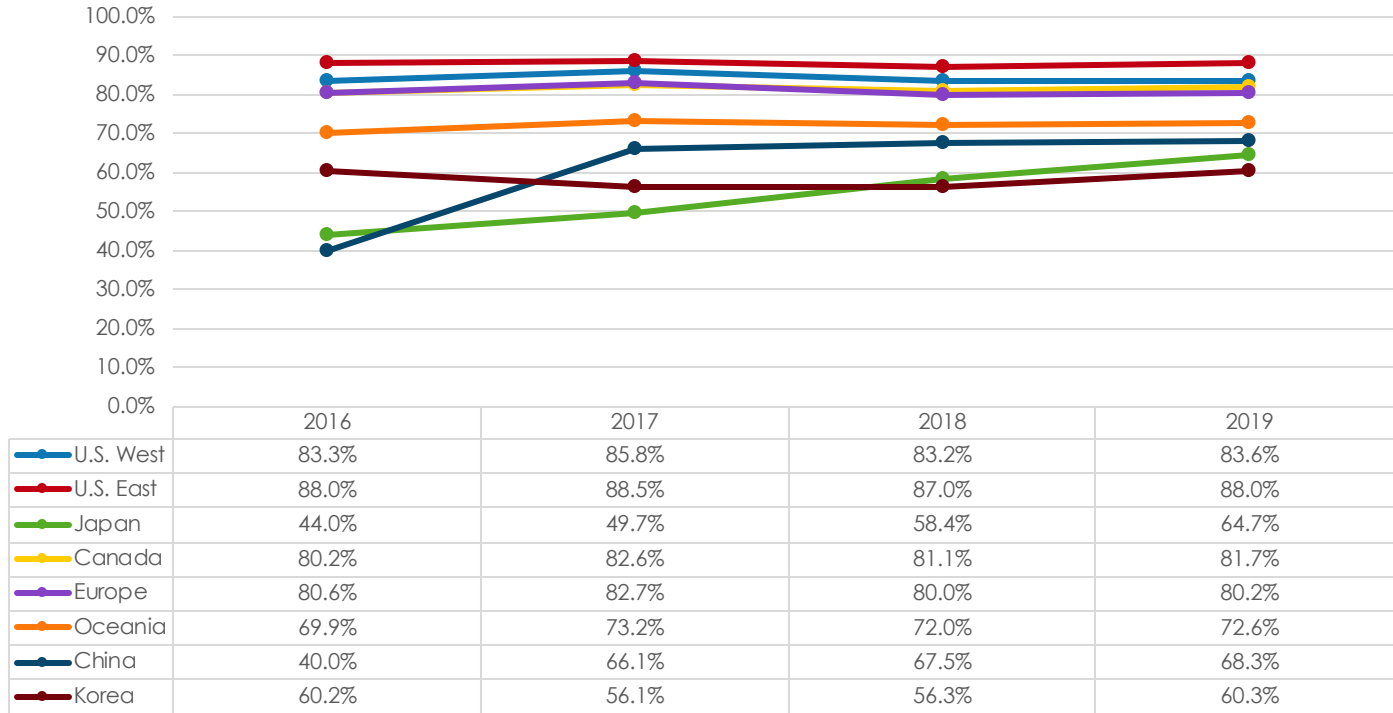
8-pt Rating Scale  
8=Excellent / 1=Poor



■ Excellent (7-8)	83.6%	88.0%	64.7%	81.7%	80.2%	72.6%	68.3%	60.3%
■ Above Avg (5-6)	15.0%	10.9%	33.2%	17.3%	18.0%	24.6%	27.3%	35.5%
■ Below Avg (3-4)	1.3%	1.0%	1.9%	0.9%	1.5%	2.7%	4.0%	4.1%
■ Poor (1-2)	0.1%	0.1%	0.2%	0.0%	0.2%	0.2%	0.3%	0.1%
BASE	9,998	9,520	6,652	6,420	1,779	2,316	1,241	1,362
▲ MEAN	7.38	7.51	6.84	7.30	7.23	6.99	6.88	6.73

# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

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



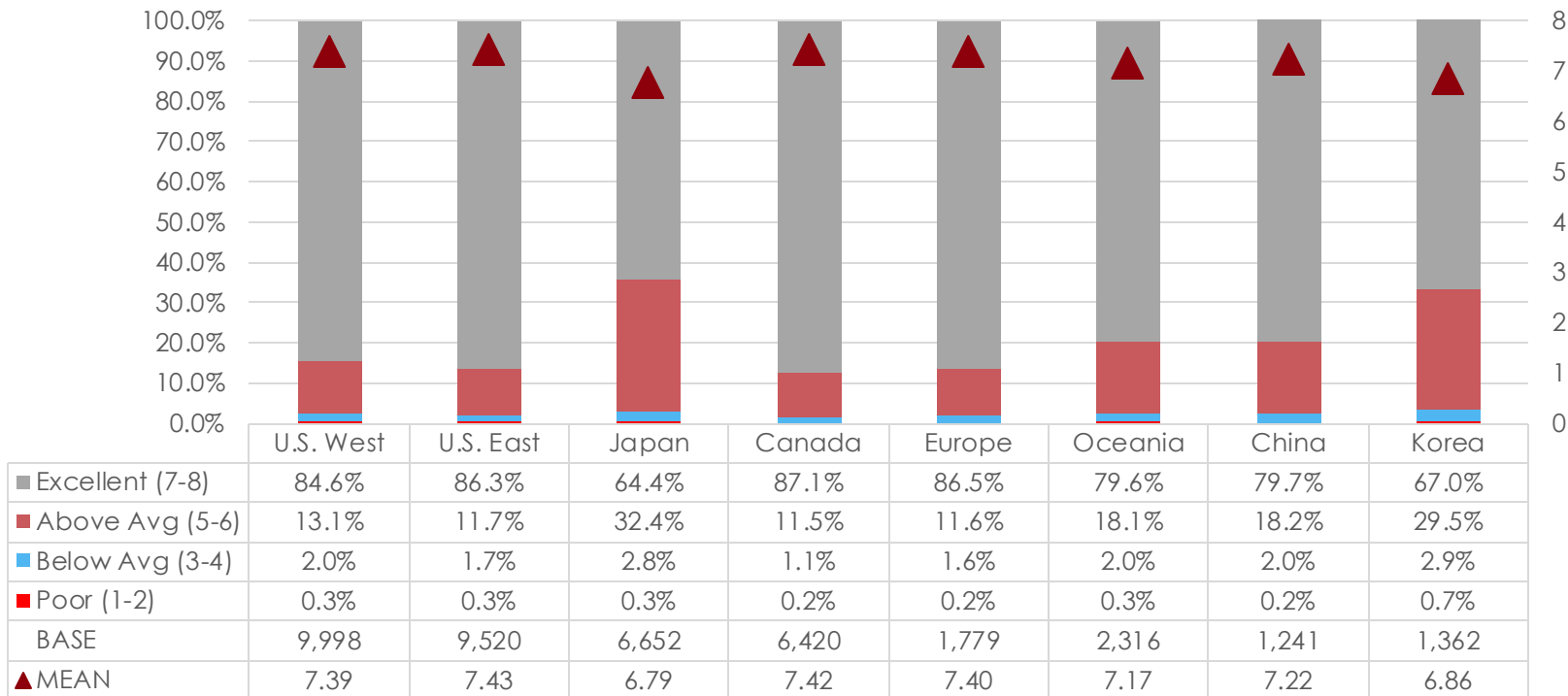
# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Older visitors (those 65 and older) provided lower satisfaction scores in this area from the following visitor markets: Japan, Canada, and Oceania.
- Travelers without a college degree from Oceania and Korea provided higher satisfaction scores on this question compared to visitors from these two markets with college degrees.
- Satisfaction among female visitors from U.S. West, U.S. East, Canada, Oceania, and Korea were higher than males from these markets when asked about unique and different experiences during their stay.
- Visitors from U.S. West, U.S. East, Japan, Canada, and China whose trip included visits to multiple islands gave higher satisfaction scores in this area than visitors from these markets whose trip was to a single island.

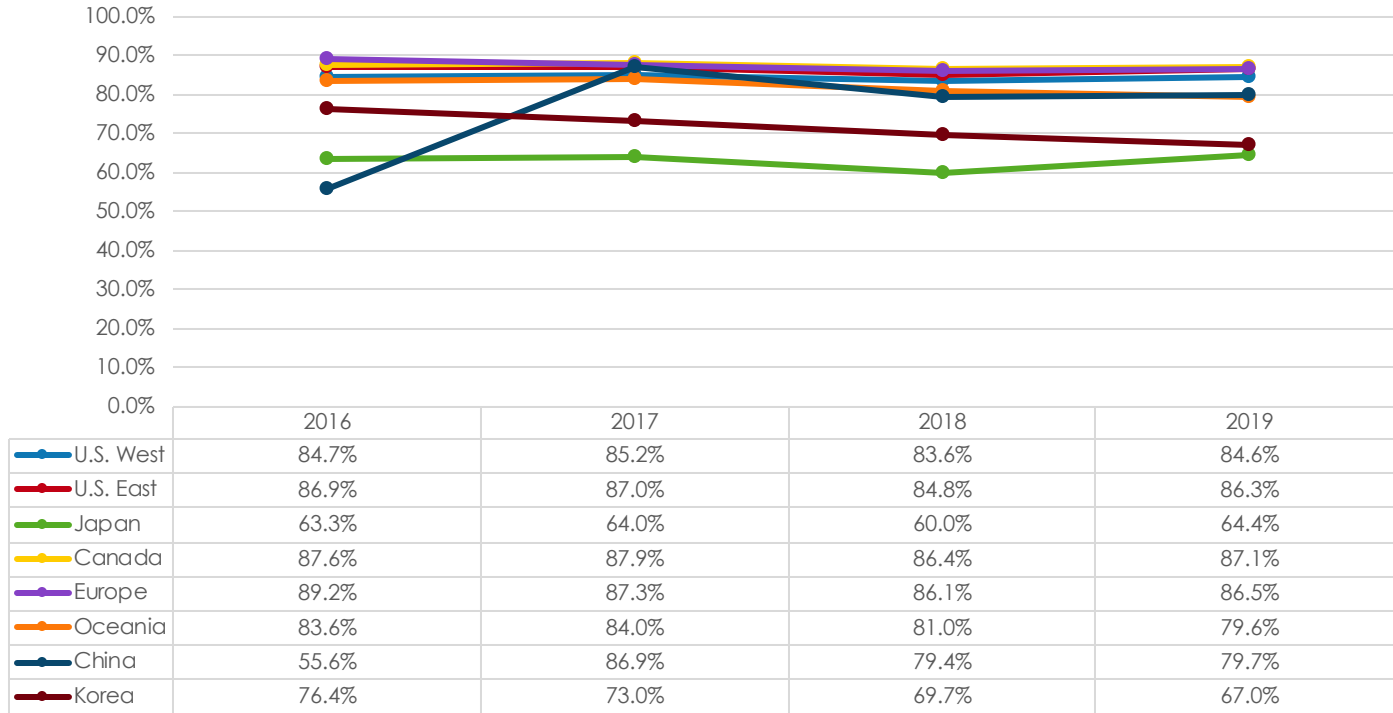
# BEING A SAFE AND SECURE DESTINATION

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



# BEING A SAFE AND SECURE DESTINATION

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



# BEING A SAFE AND SECURE DESTINATION

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Older travelers, particularly seniors felt safer than younger travelers from the following visitor markets: U.S. West, U.S. East, and Japan.
- More Japanese visitors with a college degree felt safer on their trip than did Japanese visitors without a college degree. This trend was also evident among visitors from Oceania.
- Female visitors from U.S. West, U.S. East, Canada, and Oceania gave higher satisfaction scores to this safety question than males from these visitor markets. By contrast, Japanese females felt less safe than male travelers from Japan.
- Repeat visitors from Japan felt safer on their trip than first-time visitors from Japan.
- Those traveling alone from U.S. West, U.S. East, and Japan generally felt less safe in Hawai'i compared to those traveling with others.

# SECTION – ACTIVITIES



## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.0%	96.6%	95.5%	96.2%	96.0%	92.0%	96.0%	97.3%
<b>On own (self-guided)</b>	83.2%	81.1%	65.1%	84.0%	73.2%	48.2%	55.6%	76.0%
<b>Helicopter/ airplane</b>	5.9%	11.4%	2.2%	7.6%	14.1%	7.1%	20.8%	3.8%
<b>Boat/ submarine/ whale</b>	24.5%	31.7%	10.6%	25.7%	26.7%	16.4%	27.4%	16.9%
<b>Visit towns</b>	53.9%	54.7%	32.7%	57.0%	43.9%	29.4%	30.9%	34.9%
<b>Limo/ van/ bus tour</b>	7.5%	16.9%	23.1%	9.7%	17.8%	32.4%	14.8%	15.8%
<b>Scenic views/ natural landmark</b>	58.9%	67.2%	20.8%	65.2%	62.6%	50.3%	46.3%	53.3%
<b>Movie/ TV/ film location</b>	4.2%	6.0%	3.9%	5.1%	7.5%	10.2%	28.4%	16.1%

## ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.4%	96.3%	96.0%	98.6%	96.9%	93.4%	93.5%	98.4%
<b>Beach/ sunbathing</b>	84.7%	83.0%	71.6%	90.7%	85.2%	75.8%	71.3%	75.2%
<b>Bodyboard/ Standup paddle board</b>	14.0%	10.4%	3.5%	17.2%	12.7%	8.1%	2.4%	7.0%
<b>Surfing</b>	6.3%	6.3%	2.5%	10.3%	12.3%	7.5%	6.7%	12.3%
<b>Canoeing/ kayak</b>	8.0%	7.4%	2.7%	6.4%	6.9%	3.5%	3.1%	5.8%
<b>Swim- ocean</b>	67.7%	65.4%	34.2%	77.6%	72.0%	64.2%	34.3%	45.3%
<b>Snorkel</b>	48.1%	43.4%	19.3%	55.3%	47.1%	27.2%	22.6%	45.5%
<b>Windsurf/ Kitesurf</b>	0.3%	0.3%	0.2%	0.3%	1.2%	0.0%	0.9%	0.7%
<b>Jet ski/ Parasail</b>	1.8%	1.8%	2.4%	1.0%	0.9%	1.3%	1.1%	5.2%
<b>Scuba</b>	3.4%	3.4%	1.7%	3.1%	3.6%	0.6%	4.1%	3.5%
<b>Fishing</b>	3.5%	3.5%	0.8%	2.4%	0.9%	0.7%	3.5%	1.5%
<b>Golf</b>	6.9%	6.4%	7.3%	7.5%	3.0%	2.8%	4.2%	3.0%

## ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.4%	96.3%	96.0%	98.6%	96.9%	93.4%	93.5%	98.4%
<b>Run/ Jog/ Fitness walk</b>	26.3%	24.5%	12.0%	28.9%	17.0%	20.1%	13.7%	9.2%
<b>Spa</b>	9.6%	10.0%	6.9%	6.4%	6.2%	6.1%	6.4%	7.7%
<b>Hiking</b>	47.0%	51.3%	18.2%	52.2%	47.0%	22.9%	31.7%	21.6%
<b>Backpack/Camping</b>	1.8%	2.3%	0.2%	2.6%	3.1%	0.6%	4.3%	1.8%
<b>Agritourism</b>	13.5%	16.1%	14.2%	12.1%	9.2%	8.6%	17.1%	21.3%
<b>Sport event/ tournament</b>	2.8%	2.9%	1.8%	2.8%	2.5%	2.5%	1.3%	1.5%
<b>Park/ botanical garden</b>	35.4%	43.0%	21.3%	39.8%	39.3%	30.4%	32.1%	24.9%
<b>Waterpark</b>	1.4%	1.3%	2.6%	1.7%	1.7%	1.4%	9.9%	2.9%
<b>Mountain tube/ waterfall rappel</b>	2.3%	2.1%	0.5%	1.8%	3.6%	1.2%	0.8%	0.8%
<b>Zip-lining</b>	6.1%	5.6%	1.1%	3.2%	2.3%	3.1%	1.3%	1.2%
<b>Skydiving</b>	0.6%	0.6%	0.7%	0.3%	0.8%	0.1%	5.4%	2.9%
<b>All terrain vehicle (ATV)</b>	3.0%	3.5%	1.0%	2.3%	2.3%	4.1%	7.9%	10.8%
<b>Horseback riding</b>	2.1%	2.5%	4.3%	1.8%	1.8%	1.0%	6.6%	1.0%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.1%	97.3%	97.5%	98.4%	97.3%	97.9%	95.9%	98.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.9%	26.2%	13.4%	21.2%	29.6%	18.6%	56.6%	35.8%
<b>Live music/ stage show</b>	30.3%	35.9%	17.9%	30.7%	29.0%	23.2%	14.9%	14.5%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.9%	9.1%	4.8%	7.2%	8.3%	8.0%	10.7%	4.0%
<b>Fine dining</b>	53.1%	53.8%	42.6%	44.8%	39.7%	34.7%	47.4%	48.3%
<b>Family restaurant</b>	61.8%	58.4%	24.0%	62.8%	47.8%	66.3%	23.4%	37.0%
<b>Fast food</b>	34.7%	35.2%	52.6%	45.0%	45.2%	48.9%	43.5%	57.4%
<b>Food truck</b>	30.6%	31.4%	13.4%	36.1%	32.3%	23.8%	22.9%	52.1%
<b>Café/ coffee house</b>	46.0%	43.1%	50.2%	52.1%	52.3%	58.8%	35.5%	56.0%
<b>Ethnic dining</b>	31.9%	34.3%	8.6%	25.6%	20.7%	15.5%	22.1%	26.3%
<b>Prepared own meal</b>	52.1%	42.2%	19.5%	66.8%	39.7%	25.5%	20.7%	13.8%

## ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.9%	95.4%	98.0%	96.5%	95.9%	96.7%	93.2%	97.4%
<b>Mall/ department store</b>	42.0%	40.4%	78.2%	56.2%	55.5%	75.1%	62.3%	76.7%
<b>Designer boutique</b>	17.3%	18.1%	20.2%	18.4%	14.2%	19.6%	11.8%	4.3%
<b>Hotel/ resort store</b>	33.1%	37.9%	34.7%	28.8%	27.0%	33.9%	22.8%	28.8%
<b>Swap meet/ flea market</b>	16.7%	14.8%	3.6%	16.7%	6.0%	9.8%	5.3%	2.9%
<b>Discount/ outlet store</b>	15.9%	16.2%	20.8%	22.6%	17.9%	44.6%	41.7%	62.1%
<b>Supermarket</b>	66.1%	58.6%	68.6%	72.3%	69.5%	50.6%	59.9%	57.5%
<b>Farmer's market</b>	37.0%	30.3%	19.1%	43.1%	30.5%	18.1%	13.3%	9.1%
<b>Convenience store</b>	46.9%	48.0%	42.7%	51.9%	35.6%	64.1%	42.2%	49.4%
<b>Duty free store</b>	3.8%	4.4%	32.1%	6.5%	6.0%	10.8%	54.8%	43.7%
<b>Local shop/ artisan</b>	64.7%	66.9%	11.4%	64.7%	58.9%	50.8%	29.4%	15.5%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	68.7%	75.6%	55.2%	69.7%	71.1%	71.6%	78.7%	64.6%
<b>Historic military site</b>	15.6%	27.2%	16.0%	16.7%	30.3%	41.8%	43.0%	15.5%
<b>Other historical site</b>	26.8%	31.1%	17.5%	26.5%	28.5%	21.7%	27.3%	28.9%
<b>Museum/ art gallery</b>	18.4%	17.2%	5.5%	17.6%	16.0%	15.0%	21.8%	7.1%
<b>Luau/ Polynesian show/ hula show</b>	29.4%	41.3%	14.0%	32.9%	30.4%	28.1%	16.4%	22.6%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	6.8%	8.1%	7.1%	7.4%	7.4%	6.1%	11.7%	5.4%
<b>Play/ concert/ theatre</b>	4.5%	4.3%	3.6%	4.4%	3.6%	3.4%	3.8%	4.9%
<b>Art/ craft fair</b>	14.6%	11.9%	3.4%	13.7%	7.1%	6.9%	11.6%	4.3%
<b>Festival event</b>	5.6%	5.2%	2.6%	5.0%	4.4%	4.8%	1.8%	1.5%

# ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.3%	93.2%	96.9%	95.3%	95.2%	96.6%	84.4%	95.0%
<b>Airport shuttle</b>	15.6%	17.6%	25.5%	18.6%	21.4%	48.5%	13.5%	16.2%
<b>Trolley</b>	2.8%	3.7%	44.1%	5.5%	5.5%	22.8%	4.9%	23.4%
<b>Public bus</b>	3.9%	4.8%	13.3%	10.4%	15.7%	29.4%	15.0%	11.3%
<b>Tour bus/ tour van</b>	8.7%	18.6%	31.1%	10.9%	18.0%	35.3%	21.8%	33.4%
<b>Taxi/ limo</b>	6.2%	10.0%	28.5%	13.0%	21.8%	35.9%	21.0%	21.3%
<b>Rental car</b>	79.3%	74.4%	32.8%	79.9%	64.8%	32.5%	46.9%	54.6%
<b>Ride share</b>	15.1%	18.3%	5.2%	13.7%	17.6%	24.7%	14.4%	12.0%
<b>Bicycle rental</b>	2.2%	2.3%	2.8%	3.2%	3.2%	1.7%	2.4%	1.3%

## ACTIVITIES – OTHER

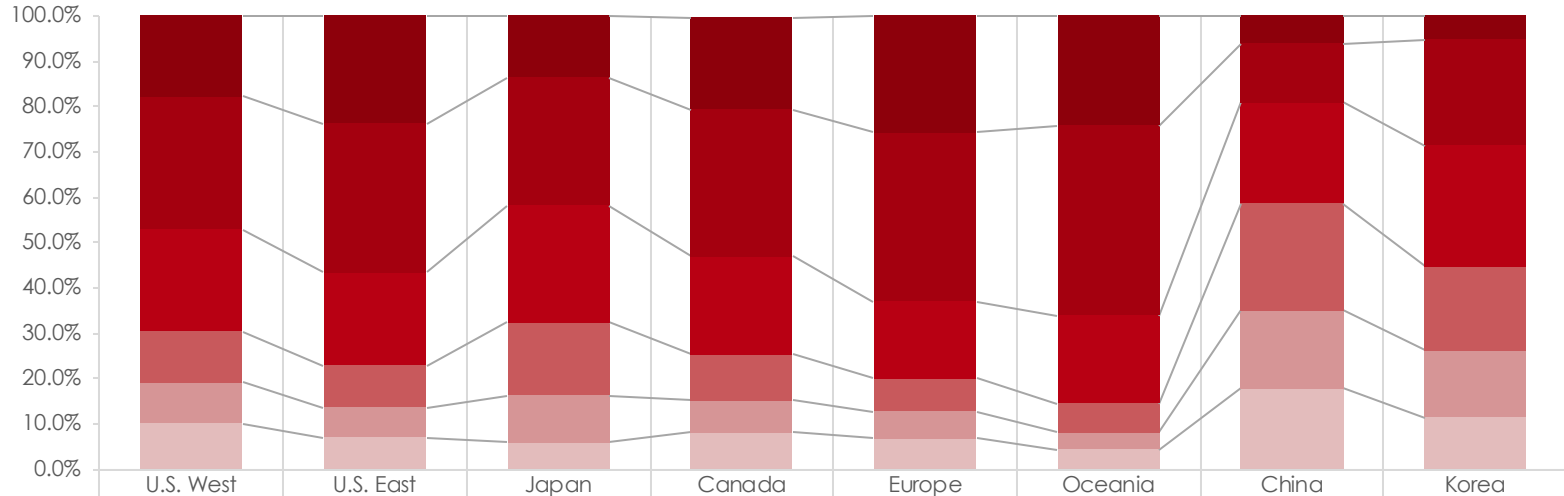
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	29.7%	25.2%	11.8%	18.6%	14.9%	9.2%	19.0%	18.7%
Visit friends/ family	29.0%	24.4%	11.3%	17.9%	12.9%	8.8%	16.9%	17.7%
Volunteer- non-profit	1.0%	1.1%	0.7%	0.9%	2.1%	0.7%	2.8%	1.0%



# SECTION – TRAVEL PLANNING

# TRAVEL PLANNING

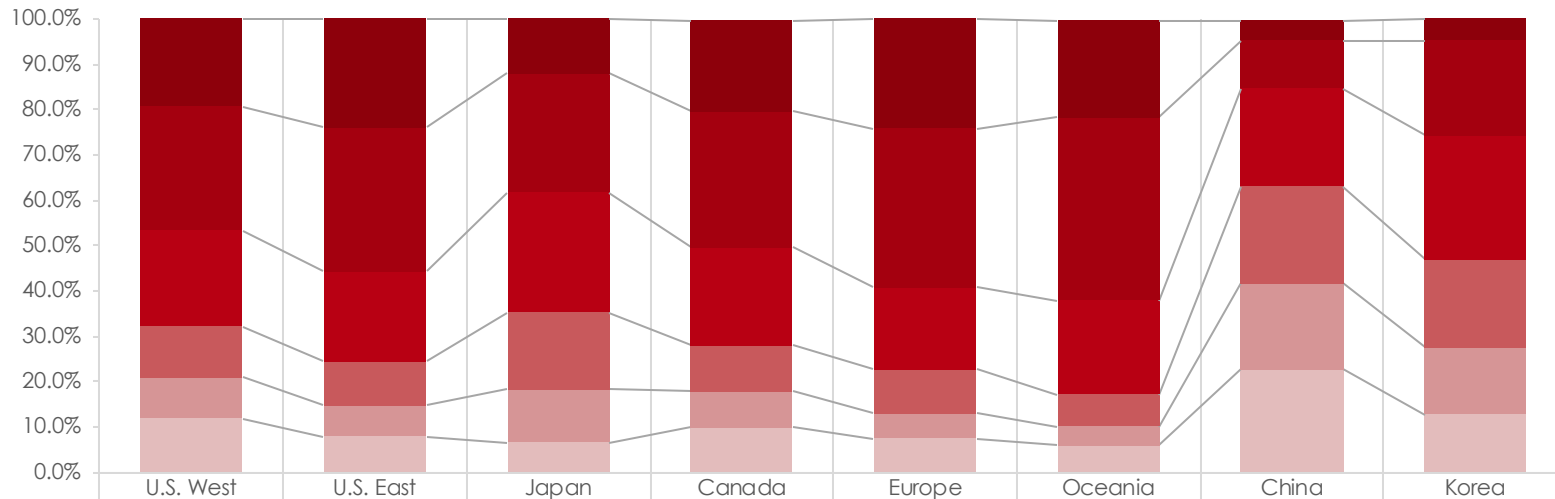
## Decision to take vacation/ pleasure trip



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	17.9%	23.8%	13.5%	20.6%	25.6%	24.1%	6.0%	5.2%
6mos-1year	29.4%	32.7%	28.3%	32.3%	37.4%	42.0%	13.0%	23.5%
3mos-6mos	22.4%	20.6%	25.7%	21.7%	16.9%	19.4%	22.3%	26.7%
2mos-3mos	11.2%	9.3%	16.2%	10.0%	7.4%	6.4%	23.6%	18.5%
1 mos-2mos	9.1%	6.6%	10.4%	7.2%	5.8%	3.8%	17.2%	14.8%
Less than 1 mos	10.1%	7.0%	5.9%	8.1%	6.9%	4.3%	17.9%	11.4%

# TRAVEL PLANNING

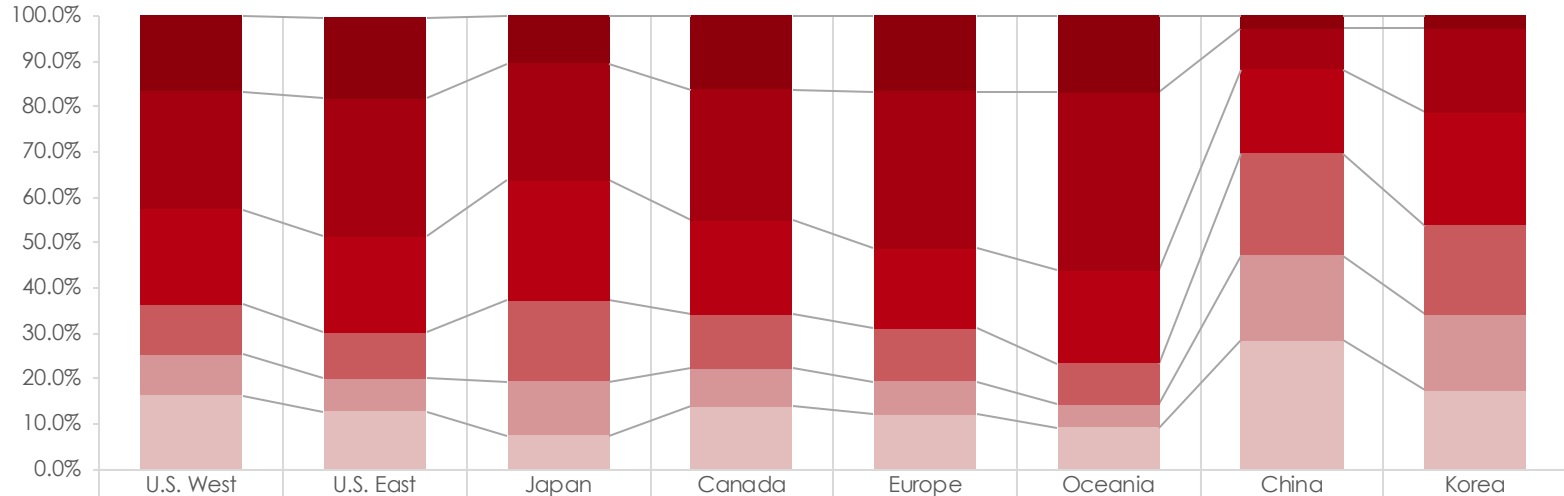
## Decision to visit HAWAI'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	19.3%	24.1%	12.0%	20.2%	24.3%	21.7%	4.6%	4.8%
6mos-1year	27.4%	31.7%	26.3%	30.0%	35.1%	40.3%	10.7%	21.0%
3mos-6mos	21.1%	19.9%	26.5%	21.6%	17.9%	20.7%	21.5%	27.3%
2mos-3mos	11.3%	9.7%	17.0%	10.3%	9.7%	7.0%	21.4%	19.4%
1 mos-2mos	8.9%	6.8%	11.5%	7.9%	5.7%	4.3%	18.9%	14.7%
Less than 1 mos	12.0%	7.9%	6.7%	9.9%	7.4%	5.9%	22.8%	12.8%

# TRAVEL PLANNING

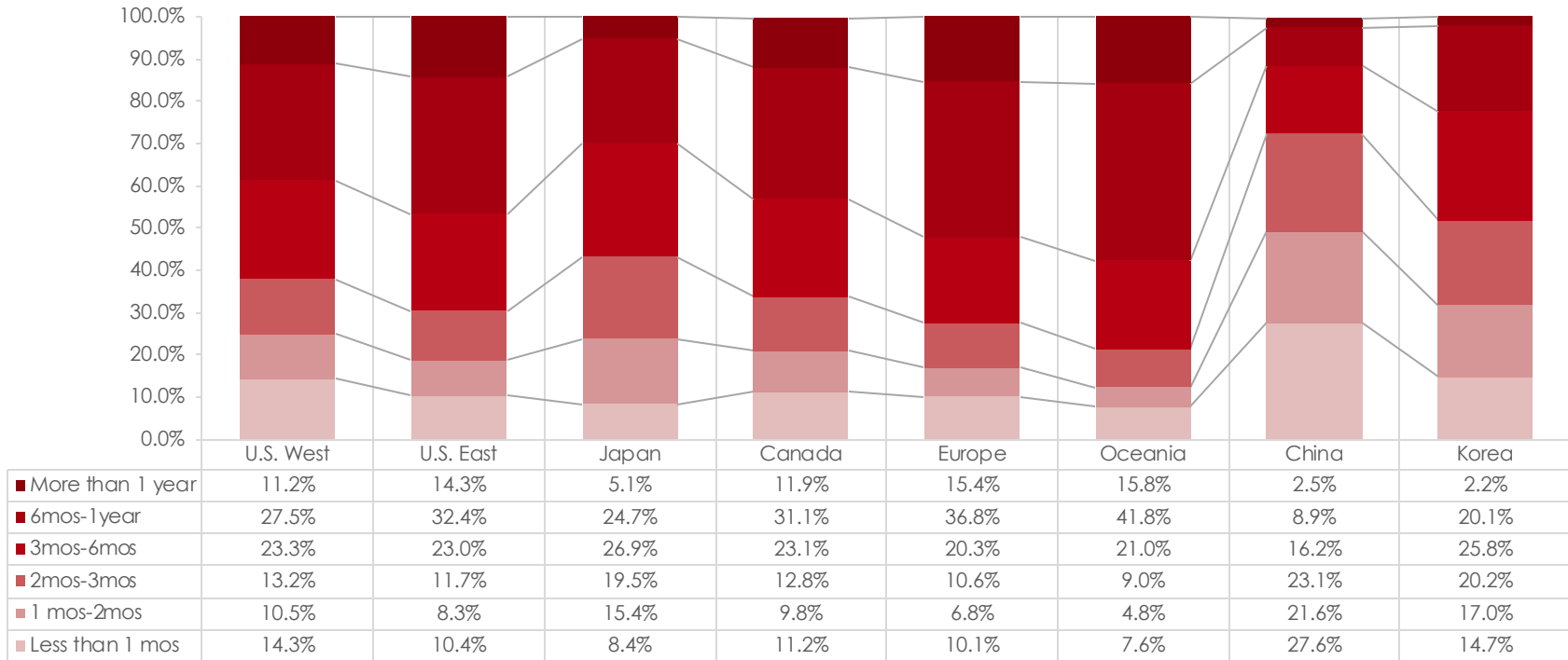
## Decision on which island to visit



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	16.6%	18.0%	10.5%	16.3%	16.7%	16.8%	2.7%	2.8%
6mos-1year	26.0%	30.5%	25.8%	28.9%	34.5%	39.3%	9.1%	18.4%
3mos-6mos	21.0%	21.3%	26.5%	20.7%	17.7%	20.6%	18.5%	25.0%
2mos-3mos	11.1%	10.0%	17.8%	11.8%	11.8%	9.0%	22.5%	19.6%
1 mos-2mos	8.9%	7.4%	12.0%	8.5%	7.1%	5.0%	18.8%	16.7%
Less than 1 mos	16.4%	12.7%	7.4%	13.8%	12.2%	9.3%	28.4%	17.5%

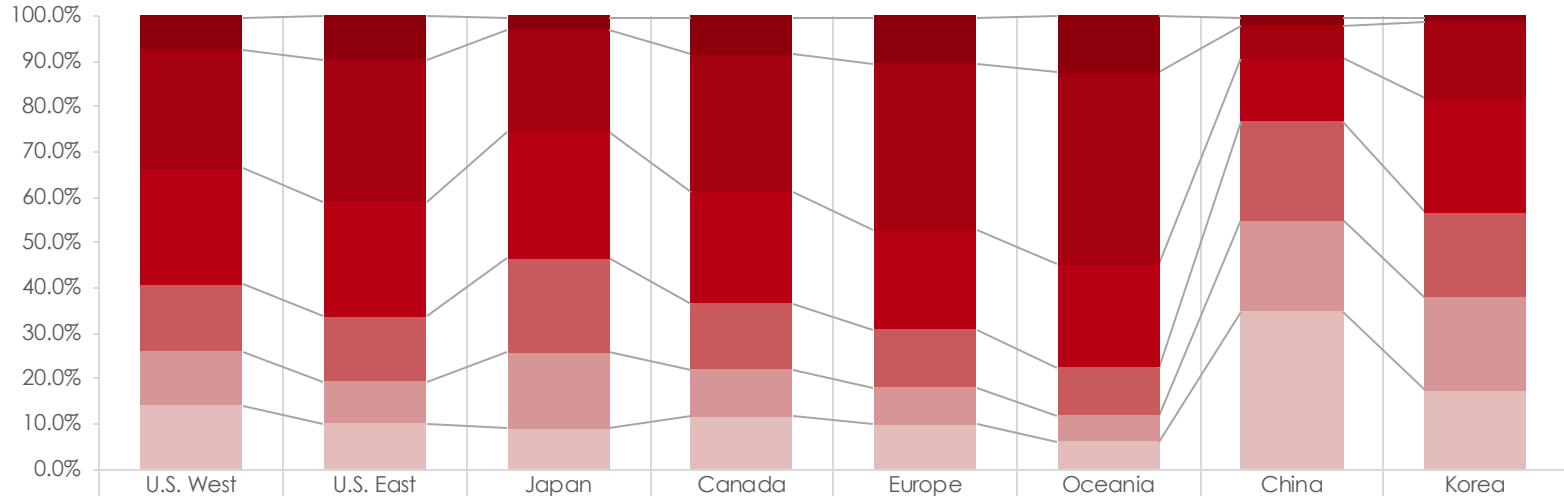
# TRAVEL PLANNING

## Determining the dates of your trip



# TRAVEL PLANNING

## Begin booking your trip



# TRAVEL PLANNING SEGMENTATION

- Younger travelers under the age of 35 from U.S. West, U.S. East, and Japan began booking their trip to Hawai'i closer to their arrival date than older segments from these visitor markets.
- Those who visited a single island from U.S. West, U.S. East, China and Canada booked their trip closer to their planned arrival date compared to those who visited multiple islands.
- Repeat visitors from U.S. West, Japan, and Canada booked their trip reservations farther out in advance of their arrival date compared to first-time visitors from these markets.

# TRAVEL PLANNING- SOURCES OF INFORMATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Personal experience	42.1%	31.4%	22.4%	37.1%	20.5%	27.0%	25.9%	12.6%
Recommendations from friends or relatives	31.3%	35.4%	16.7%	34.2%	27.7%	28.4%	24.5%	15.3%
Travel informational websites (i.e. TripAdvisor)	23.5%	29.9%	10.5%	34.0%	40.9%	32.1%	30.4%	9.0%
Travel agents/ companies specializing in packaged tours	11.6%	19.6%	52.4%	14.3%	34.3%	54.0%	36.8%	45.1%
Online travel booking site (i.e. Expedia, Kayak or Orbitz)/ online travel agent	24.9%	24.1%	12.6%	33.0%	27.0%	20.3%	37.5%	15.7%
Smart phone/ tablet apps	19.8%	20.1%	9.8%	16.7%	18.3%	12.9%	22.8%	19.0%
Guidebooks	11.7%	16.3%	25.8%	15.6%	26.5%	6.6%	14.5%	9.0%
Travel blogs	10.8%	16.3%	22.3%	18.6%	23.3%	11.2%	13.9%	39.2%
Information direct from airline/ commercial carriers	15.7%	14.1%	11.0%	11.0%	10.7%	10.5%	6.0%	4.0%
Information direct from hotels/ resorts (front desk/ concierge/ tour desk)	13.9%	16.9%	7.8%	11.2%	11.2%	10.5%	5.8%	3.1%
Social media (i.e. Facebook, Twitter, Instagram)	10.0%	12.7%	18.4%	14.4%	16.7%	12.1%	14.5%	22.1%
Hawaii's destination website (GoHawaii.com)	10.9%	16.9%	6.7%	19.5%	23.9%	14.9%	10.7%	2.8%



# TRAVEL PLANNING- SOURCES OF INFORMATION

- Visitors from Japan, Oceania, China, Europe, and Korea were more reliant on travel agents and companies that specialize in packaged tours than visitors from the other markets.
- Online travel booking sites were less likely to be used by visitors from Japan and Korea.
- Japanese, Korean, and Chinese visitors were least likely to have visited GoHawaii.com prior to arrival.

# SECTION – TRIP PURPOSE

# PRIMARY PURPOSE OF TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Vacation	61.5%	56.2%	68.1%	74.5%	67.2%	71.8%	72.6%	52.3%
Anniversary/ birthday	8.4%	9.9%	2.1%	6.8%	6.3%	5.1%	1.2%	2.8%
Visit friends or relatives	7.7%	8.6%	1.0%	2.9%	4.6%	2.0%	2.4%	1.0%
Honeymoon	1.6%	3.9%	10.1%	2.6%	8.2%	1.9%	2.3%	32.8%
Attend a business meeting or conduct business	3.8%	4.7%	2.3%	1.1%	1.4%	0.4%	5.3%	1.0%
Attend/ participate in a wedding/ vow renewal	2.6%	2.3%	3.7%	2.1%	1.3%	1.3%	2.6%	0.4%
Have a vacation home/ timeshare	2.8%	2.0%	2.3%	1.9%	0.4%	0.3%	1.0%	0.1%
Family gathering/ reunion	2.7%	2.0%	0.7%	2.1%	1.6%	1.4%	1.4%	1.6%

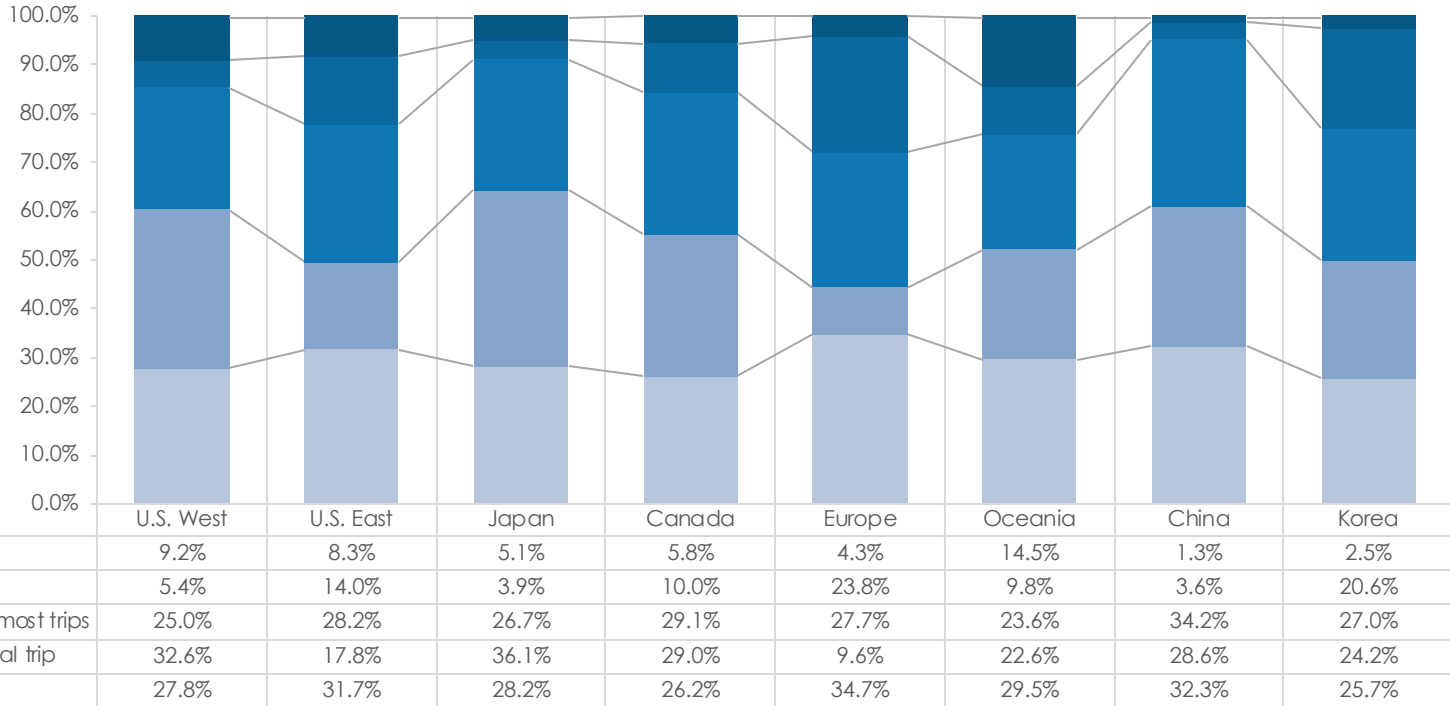
# SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Vacation	84.1%	82.2%	87.7%	91.7%	87.9%	88.9%	88.1%	77.5%
No secondary purpose	46.3%	45.4%	46.5%	58.9%	57.4%	53.8%	59.6%	45.2%
Anniversary/ birthday	15.8%	16.8%	6.1%	13.6%	13.2%	9.3%	2.5%	10.8%
Visit friends or relatives	15.9%	15.6%	3.6%	7.1%	8.7%	4.1%	4.4%	2.5%
Family gathering/ reunion	6.8%	5.5%	4.0%	5.8%	3.3%	3.5%	4.3%	3.9%
Shopping/ fashion	1.3%	0.7%	24.3%	1.4%	1.7%	7.8%	14.1%	14.9%
Honeymoon	2.3%	4.6%	12.5%	2.9%	9.2%	2.2%	3.0%	36.2%
Have a vacation home/ timeshare	6.3%	4.4%	5.3%	4.7%	1.5%	1.0%	3.3%	0.3%
Attend a business meeting or conduct business	5.4%	6.1%	3.2%	1.6%	1.8%	0.8%	6.3%	1.6%
Attend/ participate in a wedding/ v ow renewal	3.1%	2.7%	4.1%	2.4%	1.7%	1.5%	3.3%	0.6%

# SECONDARY PURPOSE OF TRIP - SEGMENTATION

- One in four Japanese visitors listed shopping as a reason for visiting Hawai'i. This was also mentioned by at least 10 percent of Korean and Chinese visitors.
- A third of the Korean visitors who participated in this survey were here on their honeymoon.
- One in five visitors from Oceania indicated that Hawai'i was a layover stop on their way home or to another destination.
- Repeat visitors were more likely to indicate that visiting friends was a reason for their trip compared to first-time visitors.

# VACATION TRIP DESCRIPTION



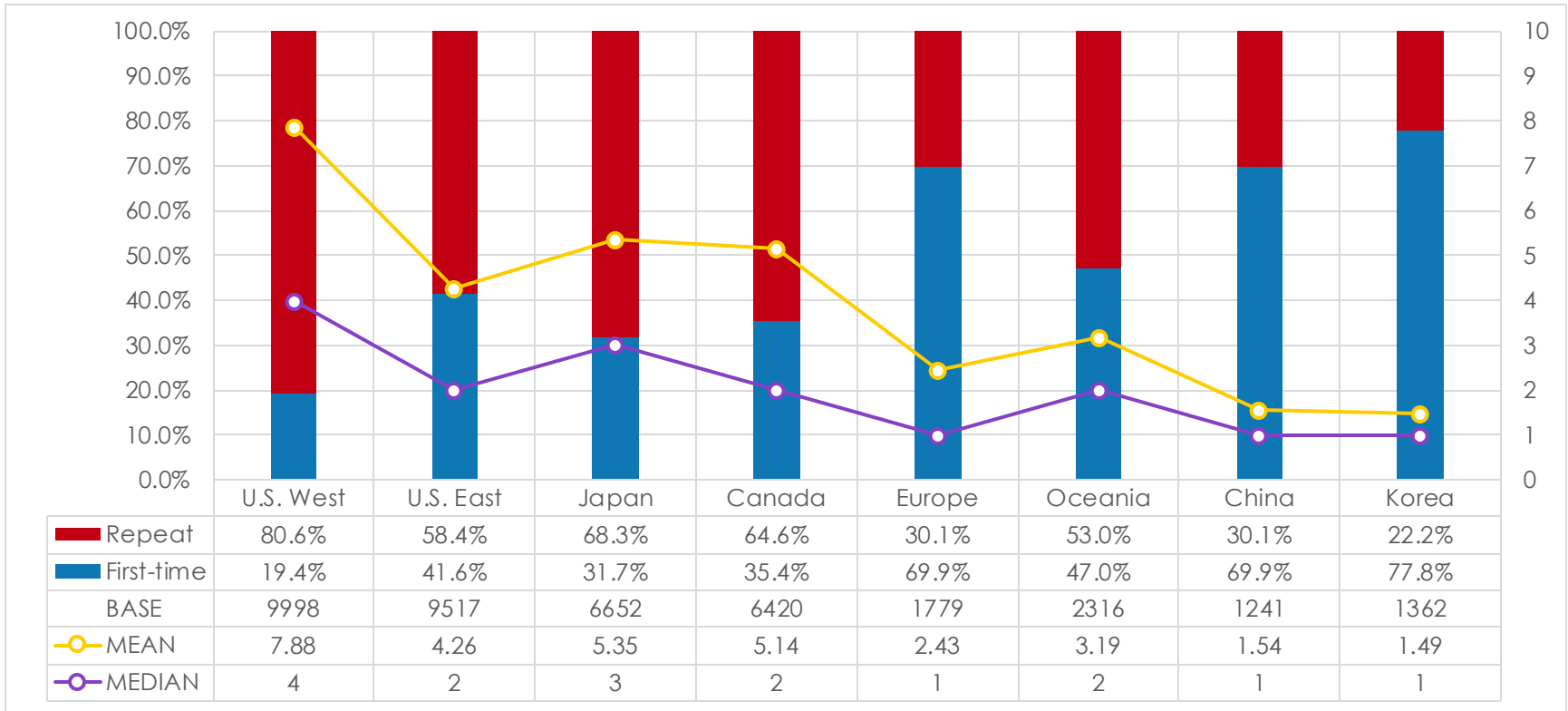
# VACATION TRIP DESCRIPTION - SEGMENTATION

- European and Korean visitors were the most likely to describe this trip to Hawai'i as a once in a lifetime experience.
- Visitors from Japan, U.S. West, China and Canada were the most likely to describe their trip as an annual or semi-annual occurrence.
- Visitors from the U.S. under the age of 35 were likely to describe their trip to Hawai'i as a special occasion.
- Older travelers from the U.S. East, U.S. West, Japan, and Canada were more likely to describe their trip as an annual or semi-annual occurrence.

# SECTION – TRIPS TO HAWAI‘I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR



# 1<sup>ST</sup> TIME VS REPEAT VISITOR

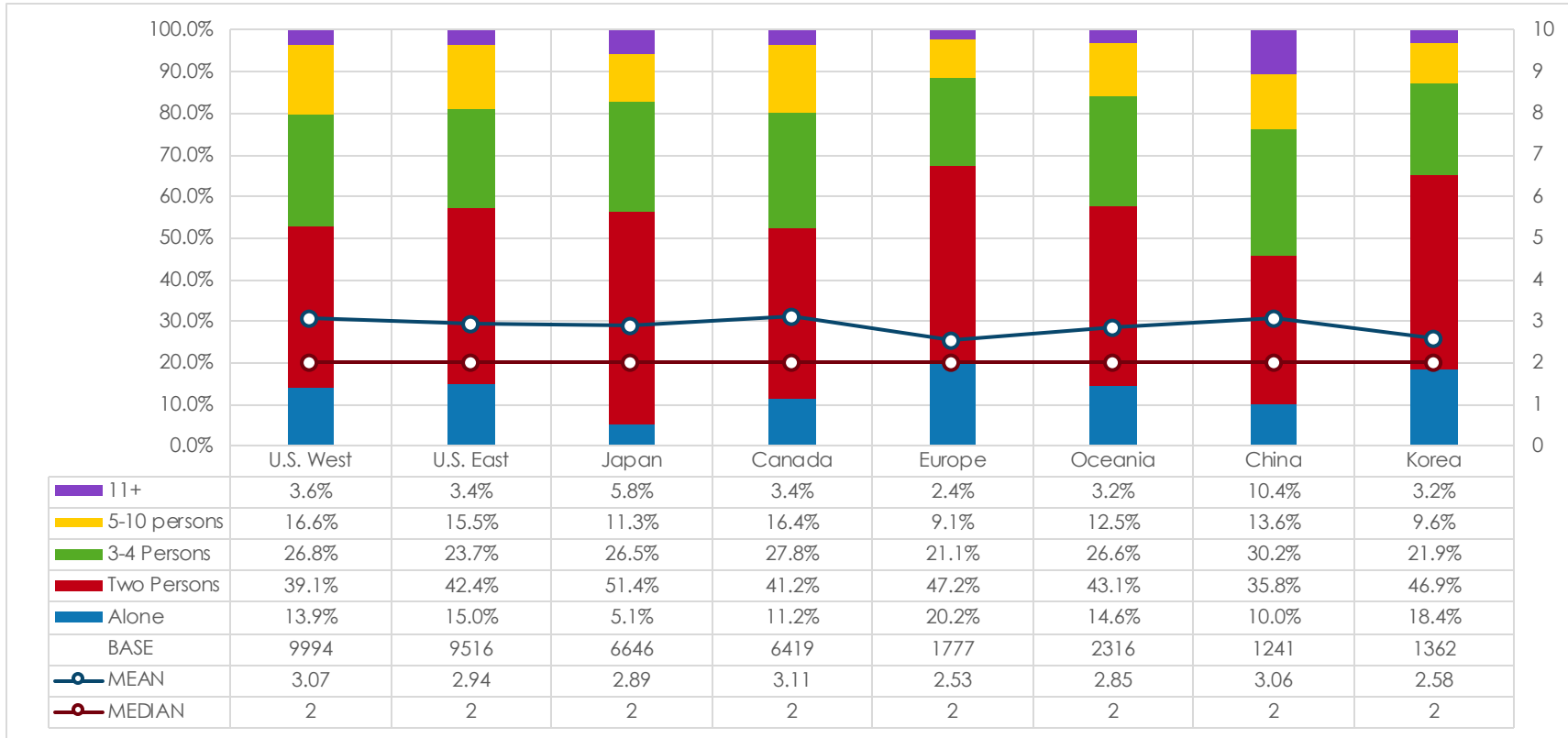
- More affluent visitors from the U.S. and Canada were more likely to have traveled to Hawai'i previously.
- Males traveled more frequently to Hawai'i among the following visitor markets compared to females: U.S. West, U.S. East, and Canada.
- Travelers from U.S. West and U.S. East who were college graduates traveled to Hawai'i more frequently than visitors from these markets who did not have a college degree. The opposite was true among the Canadian market where those without a degree traveled to the islands more frequently.
- Visitors from U.S. East, Canada, Europe, and Korea whose recent trip was to a single island have been to Hawai'i more often than visitors from these markets who visited multiple islands.

# SECTION – TRAVEL PARTY

# TRAVEL PARTY MEMBERS

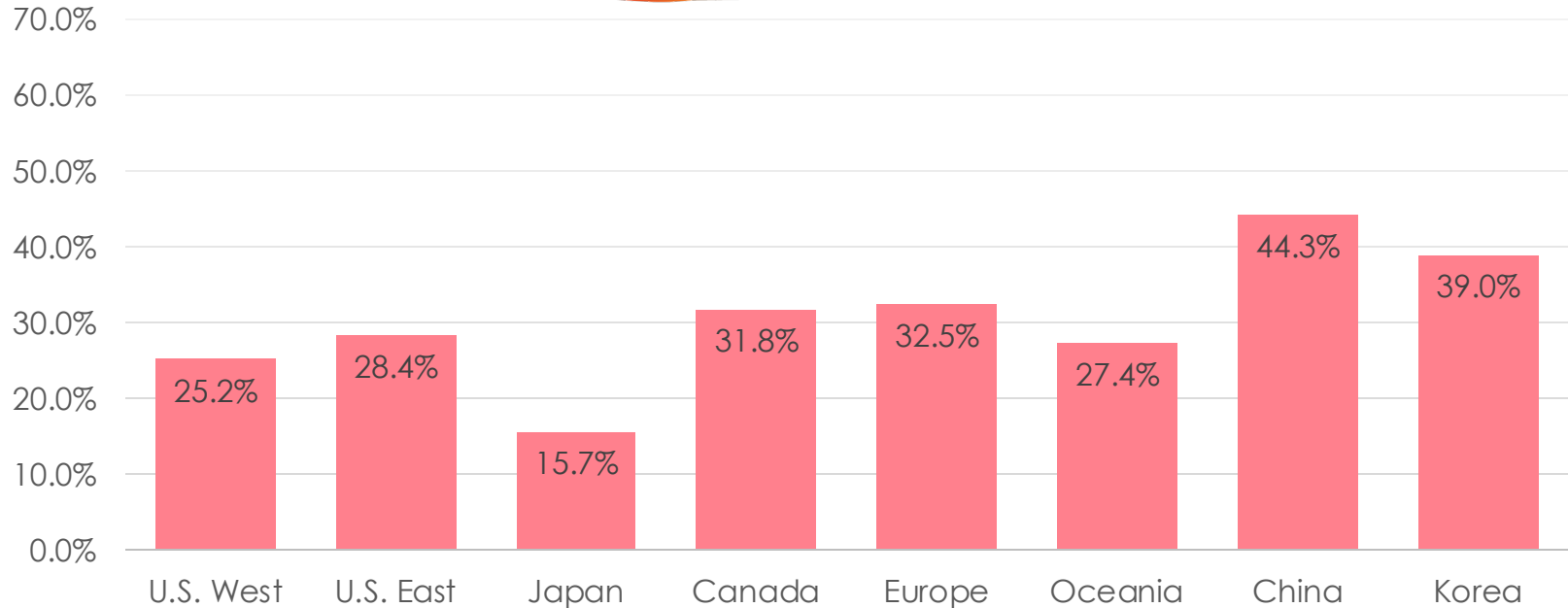
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>My spouse</b>	60.8%	62.0%	56.6%	62.1%	50.7%	62.8%	37.8%	66.6%
<b>Other adult members of my family</b>	28.7%	27.6%	23.6%	28.3%	19.3%	23.9%	20.3%	20.8%
<b>My child(ren)/ grandchild(ren) under 18</b>	25.2%	18.9%	17.0%	23.7%	14.7%	21.3%	15.9%	13.3%
<b>My friends/ associates</b>	16.2%	16.6%	21.2%	17.0%	15.7%	16.4%	29.8%	11.2%
<b>Myself only (traveled alone/ no one else)</b>	8.7%	9.9%	5.7%	6.0%	11.8%	7.7%	11.0%	3.4%
<b>My girlfriend/ boyfriend</b>	7.6%	6.2%	4.2%	8.6%	13.8%	4.9%	9.7%	2.1%
<b>Same sex partner</b>	1.6%	1.2%	0.2%	1.2%	1.5%	1.1%	1.5%	0.0%

# TRAVEL PARTY SIZE

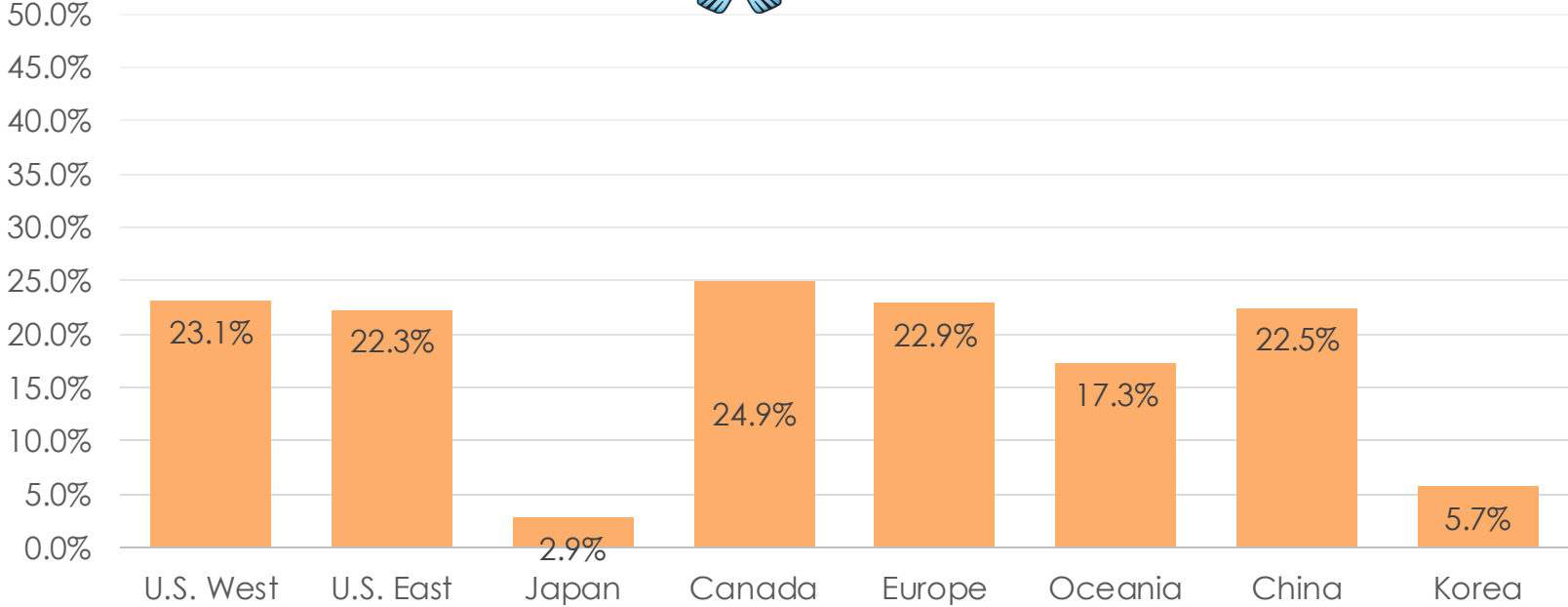


# SECTION – SIGNAGE

# HVCB POST-ARRIVAL EXPERIENCE LOGO



# OCEAN SAFETY LOGO





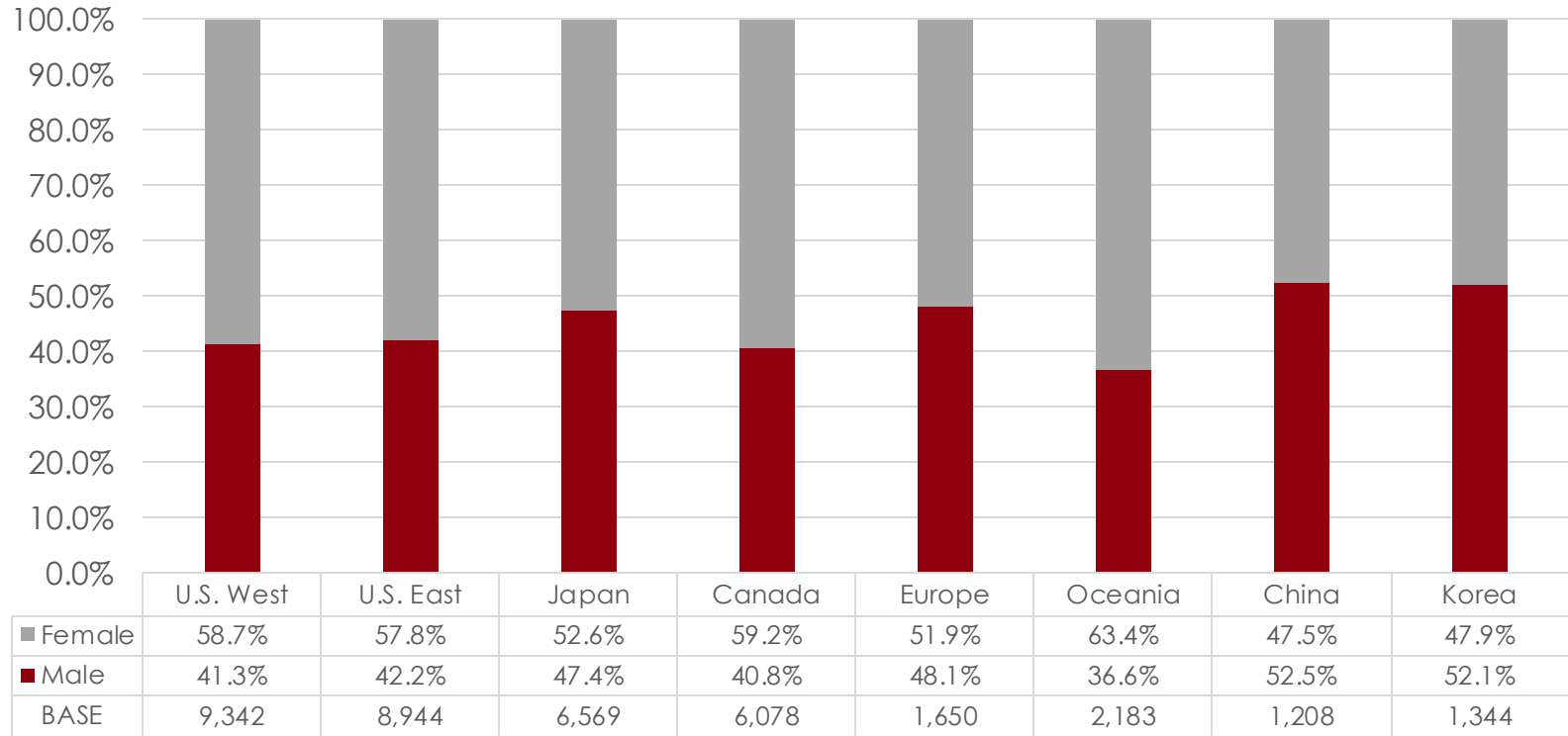
# OCEAN SAFETY LOGO



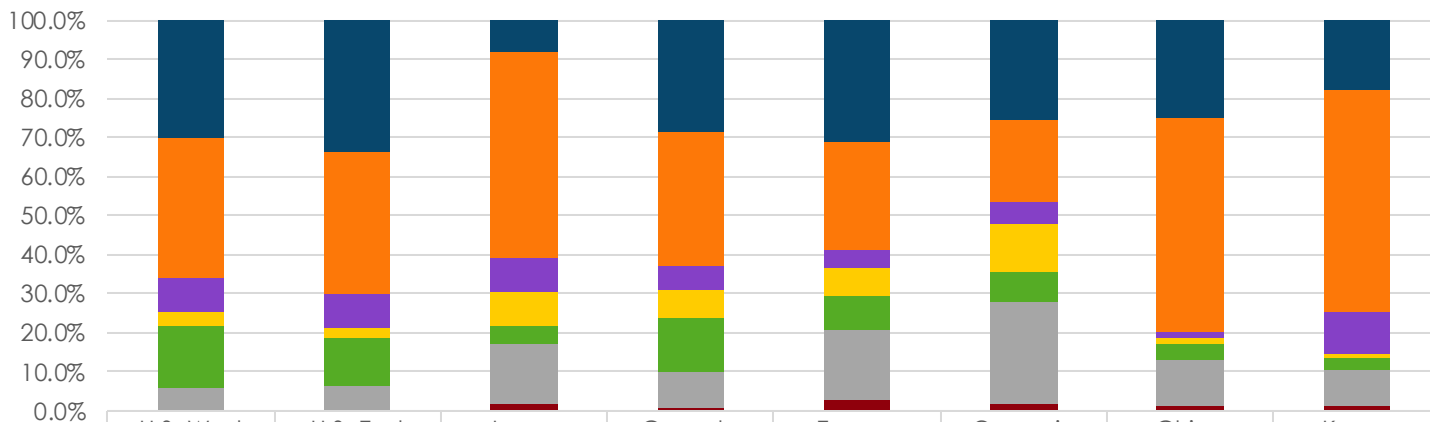
- Male visitors from China were more likely to recall seeing this logo than female visitors from China.
- Visitors from U.S. West and U.S. East who have been to Hawai'i before were less likely to recall seeing this logo than first-time visitors from these markets.

# SECTION – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION

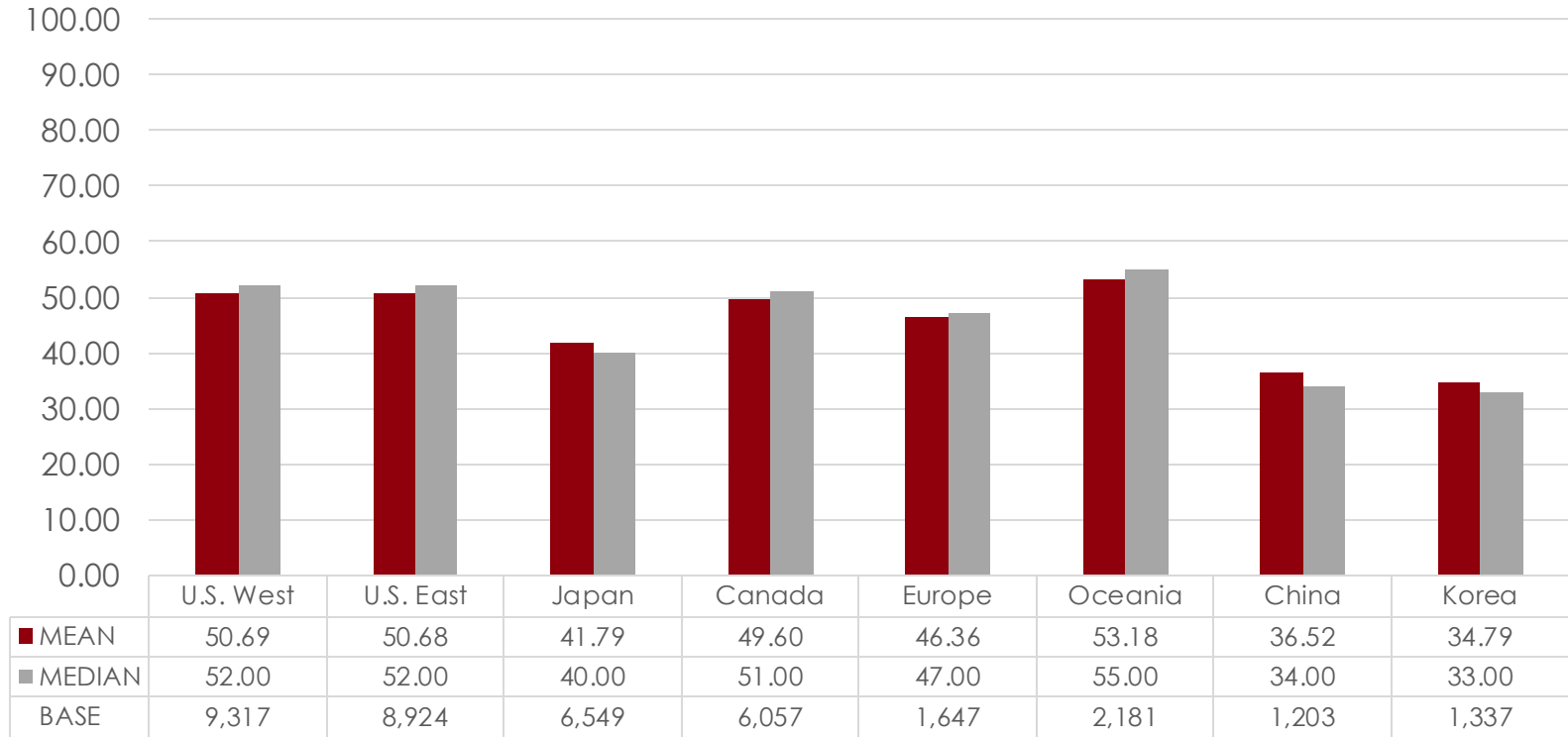


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Post-Graduate	29.9%	33.8%	8.4%	28.4%	31.1%	25.5%	25.1%	17.8%
■ College Grad	35.8%	36.4%	52.6%	34.3%	27.8%	21.1%	54.6%	56.8%
■ Associate Degree	9.0%	8.3%	8.6%	6.1%	4.4%	5.6%	1.5%	11.0%
■ Vocational/ Tech	3.6%	2.7%	8.6%	7.3%	7.1%	12.3%	1.5%	1.0%
■ Some College	15.9%	12.4%	4.5%	14.0%	9.0%	7.5%	4.2%	2.7%
■ H.S. Grad	5.4%	5.9%	15.5%	9.0%	17.6%	26.1%	11.8%	9.2%
■ Some / No H.S.	0.4%	0.5%	1.9%	0.9%	2.9%	2.0%	1.3%	1.5%
BASE	9,317	8,928	6,562	6,065	1,647	2,180	1,207	1,343

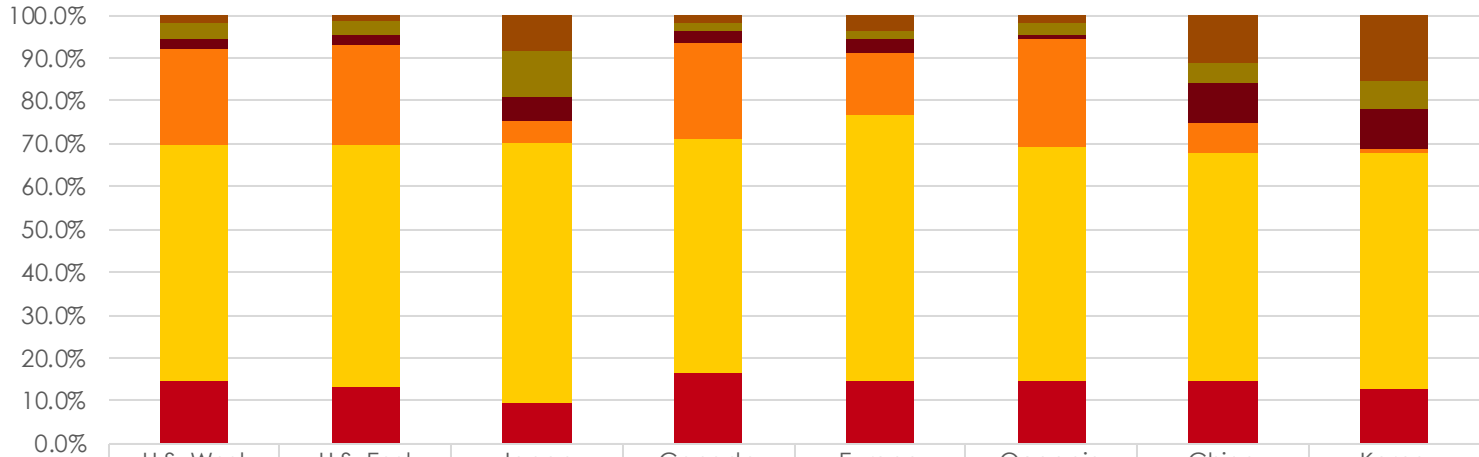
## VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	6.1%	5.8%	6.9%	17.2%	9.4%
\$40,000 to \$59,999	7.3%	8.1%	8.6%	14.6%	9.8%
\$60,000 to \$79,999	9.8%	10.5%	10.3%	13.1%	11.5%
\$80,000 to \$99,999	9.7%	10.5%	11.0%	12.9%	12.0%
\$100,000 to \$124,999	13.9%	14.4%	14.2%	10.7%	13.2%
\$125,000 to \$149,999	12.2%	11.5%	13.1%	8.3%	12.2%
\$150,000 to \$174,999	9.3%	8.9%	9.7%	6.4%	8.6%
\$175,000 to \$199,999	6.7%	6.0%	6.6%	4.2%	7.1%
\$200,000 to \$249,999	9.2%	8.1%	7.6%	4.6%	7.2%
\$250,000 +	15.7%	16.2%	12.0%	8.0%	9.0%

# VISITOR PROFILE – AGE

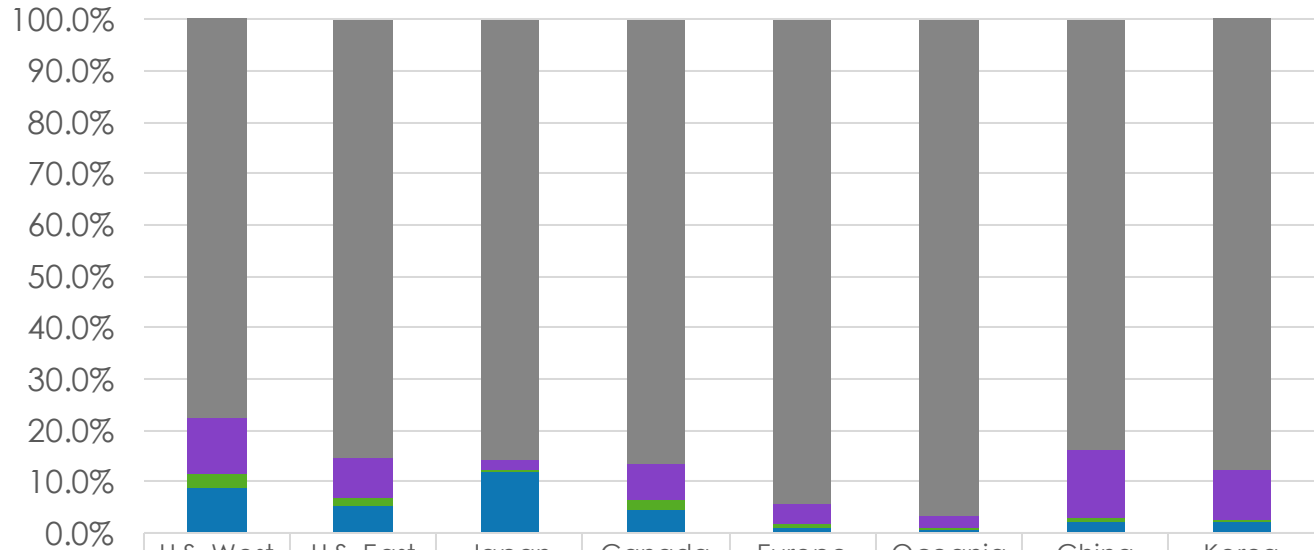


# VISITOR PROFILE – EMPLOYMENT STATUS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other	1.6%	1.5%	8.2%	1.7%	3.9%	1.7%	11.2%	15.5%
Homemaker	4.1%	3.1%	10.8%	2.0%	1.5%	2.7%	4.9%	6.4%
Student	2.2%	2.5%	5.9%	2.9%	3.2%	1.3%	9.2%	9.5%
Retired	22.3%	23.0%	5.0%	22.5%	14.5%	25.1%	7.1%	0.6%
Employed	55.1%	56.9%	60.4%	54.5%	62.3%	54.4%	53.2%	55.1%
Self-employed	14.7%	13.0%	9.7%	16.4%	14.6%	14.8%	14.6%	12.9%
BASE	9,317	8,928	6,562	6,065	1,647	2,180	1,207	1,343

# VISITOR PROFILE – HAWAII PROPERTY OWNER



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Do not nor plan to purchase	77.7%	85.3%	85.7%	86.6%	94.3%	96.7%	83.8%	87.6%
■ Plan to in future	10.9%	8.0%	2.0%	7.1%	3.8%	2.2%	13.3%	9.8%
■ Other Property Type	2.7%	1.5%	0.4%	1.7%	0.7%	0.5%	0.7%	0.4%
■ Timeshare	8.8%	5.2%	11.8%	4.6%	1.2%	0.6%	2.2%	2.3%
BASE	9,317	8,928	6,562	6,065	1,647	2,180	1,207	1,343



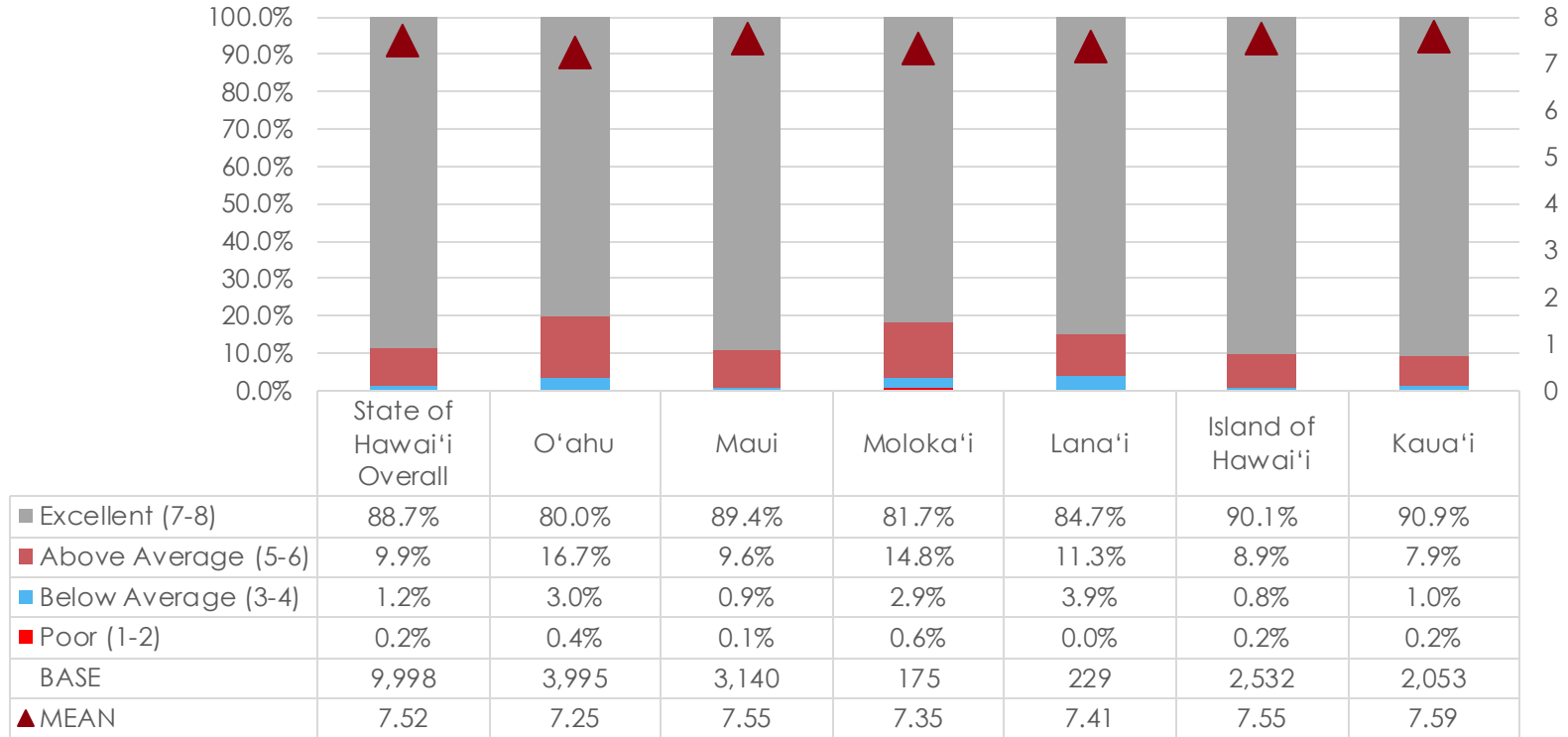
# COMPETITIVE BRANDSET

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other U.S. States	80.0%	85.7%	18.4%	72.6%	60.6%	57.4%	34.0%	17.7%
California	67.4%	48.7%	8.3%	40.3%	50.0%	43.2%	19.5%	14.0%
Las Vegas	54.7%	38.3%	7.0%	36.0%	36.8%	35.9%	18.4%	12.4%
Europe	33.9%	35.7%	21.3%	43.2%	89.5%	38.5%	34.8%	27.7%
Florida	30.8%	61.7%	4.0%	31.7%	29.2%	14.2%	7.8%	3.1%
New York City	31.1%	46.3%	7.9%	30.0%	45.2%	36.1%	22.1%	11.8%
Mexico	36.5%	30.9%	2.4%	38.4%	17.0%	8.6%	5.1%	3.1%
Canada	29.0%	29.8%	6.7%	68.7%	24.9%	26.8%	17.1%	9.2%
Caribbean	18.2%	35.2%	1.5%	32.6%	21.7%	7.0%	3.0%	0.9%
Japan	8.1%	5.5%	34.6%	8.2%	10.6%	12.0%	51.5%	49.3%
Other Asia	8.7%	6.8%	23.4%	9.6%	18.3%	21.7%	27.9%	36.1%
Alaska	16.2%	12.4%	1.0%	7.6%	4.3%	12.8%	4.1%	0.7%

# SECTION – U.S. WEST

# OVERALL SATISFACTION – MOST RECENT VISIT – U.S. WEST

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



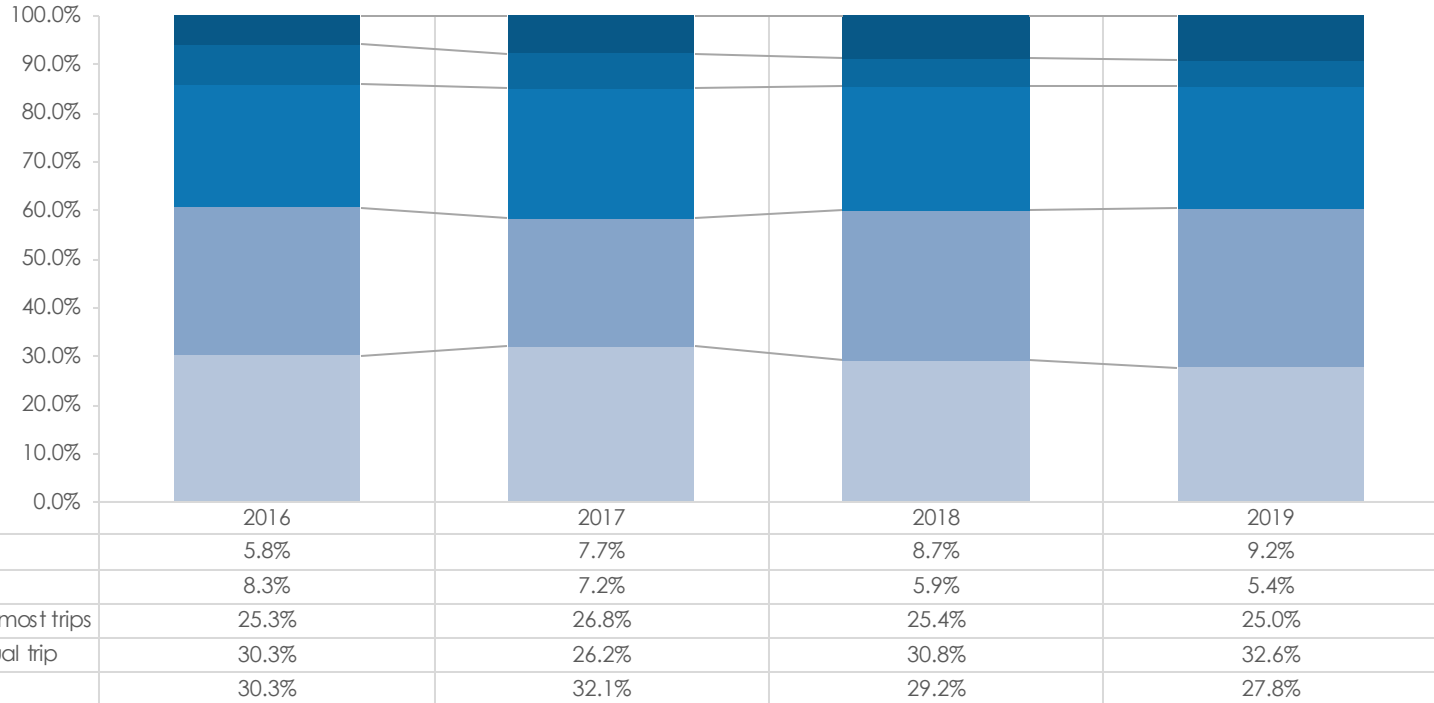
# PRIMARY PURPOSE OF TRIP U.S. WEST

	2018	2019
Vacation	59.5%	61.5%
Anniversary/ birthday	7.8%	8.4%
Visit friends or relatives	8.2%	7.7%
Attend a business meeting or conduct business	3.9%	3.8%
Have a vacation home/ timeshare	3.0%	2.8%
Family gathering/ reunion	2.5%	2.7%
Attend/ participate in a wedding/ vow renewal	3.2%	2.6%
Attend a convention, conference or seminar	2.6%	1.8%
Honeymoon	2.0%	1.6%

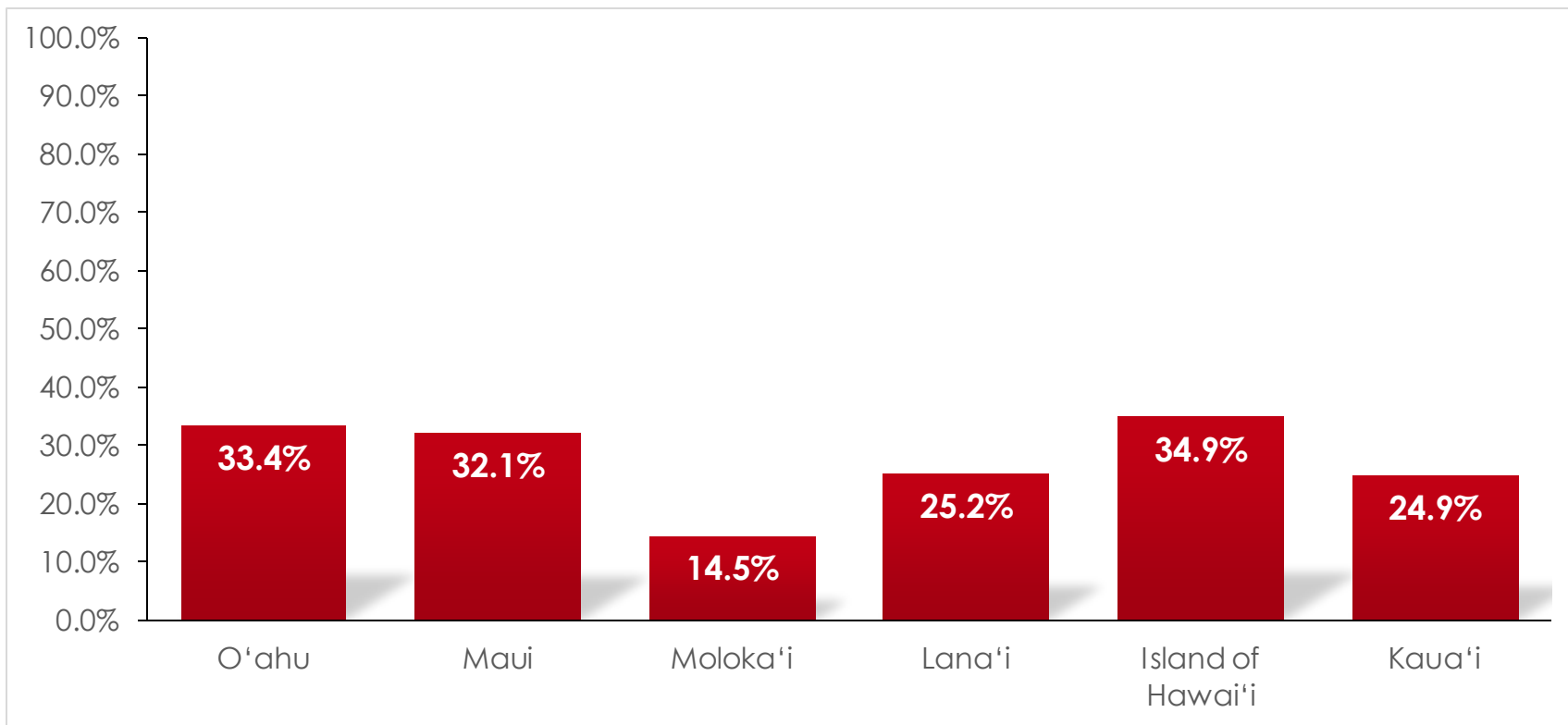
# SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE U.S. WEST

	2018	2019
Vacation	82.8%	84.1%
Visit friends/ relatives	16.6%	15.9%
Anniversary/ birthday	14.1%	15.8%
Family gathering/ reunion	7.1%	6.8%
Vacation home/ timeshare	6.7%	6.3%
Business trip	5.5%	5.4%
Attend wedding/ vow renewal	3.7%	3.1%
Convention, conference, seminar	3.3%	2.3%
Honeymoon	2.7%	2.3%

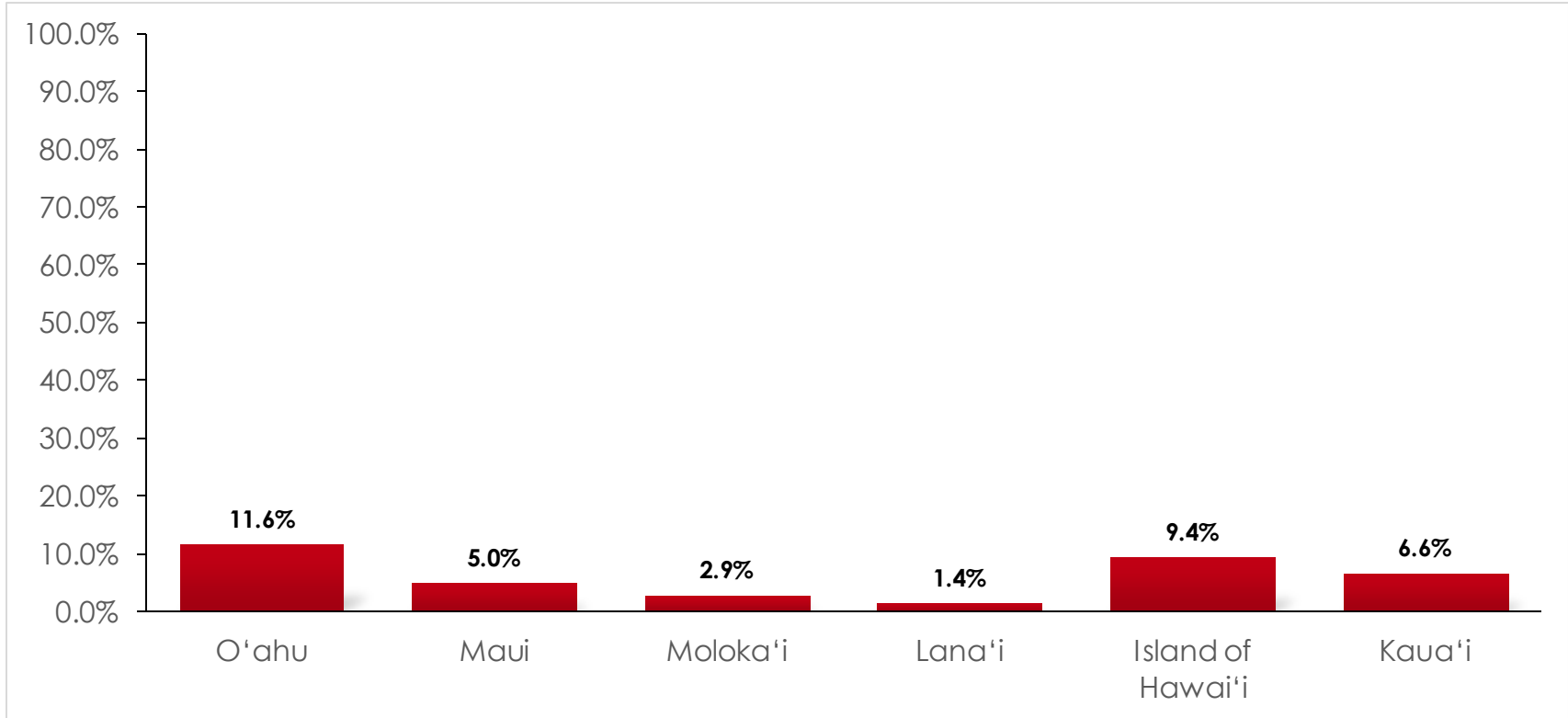
# VACATION TRIP DESCRIPTION – U.S. WEST



# ADVERTISING AWARENESS – U.S. WEST

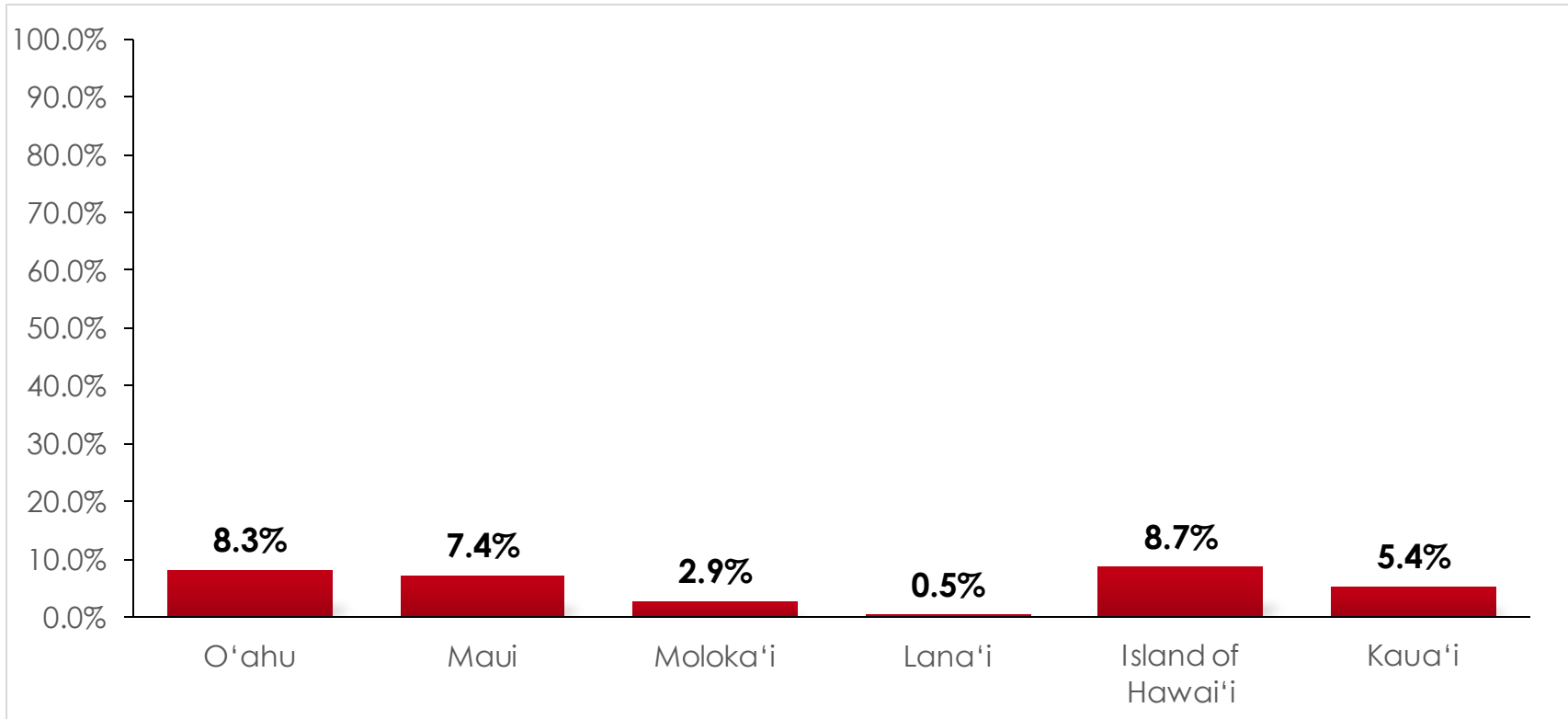


# IMPACT OF LOCATION FILMING – U.S. WEST

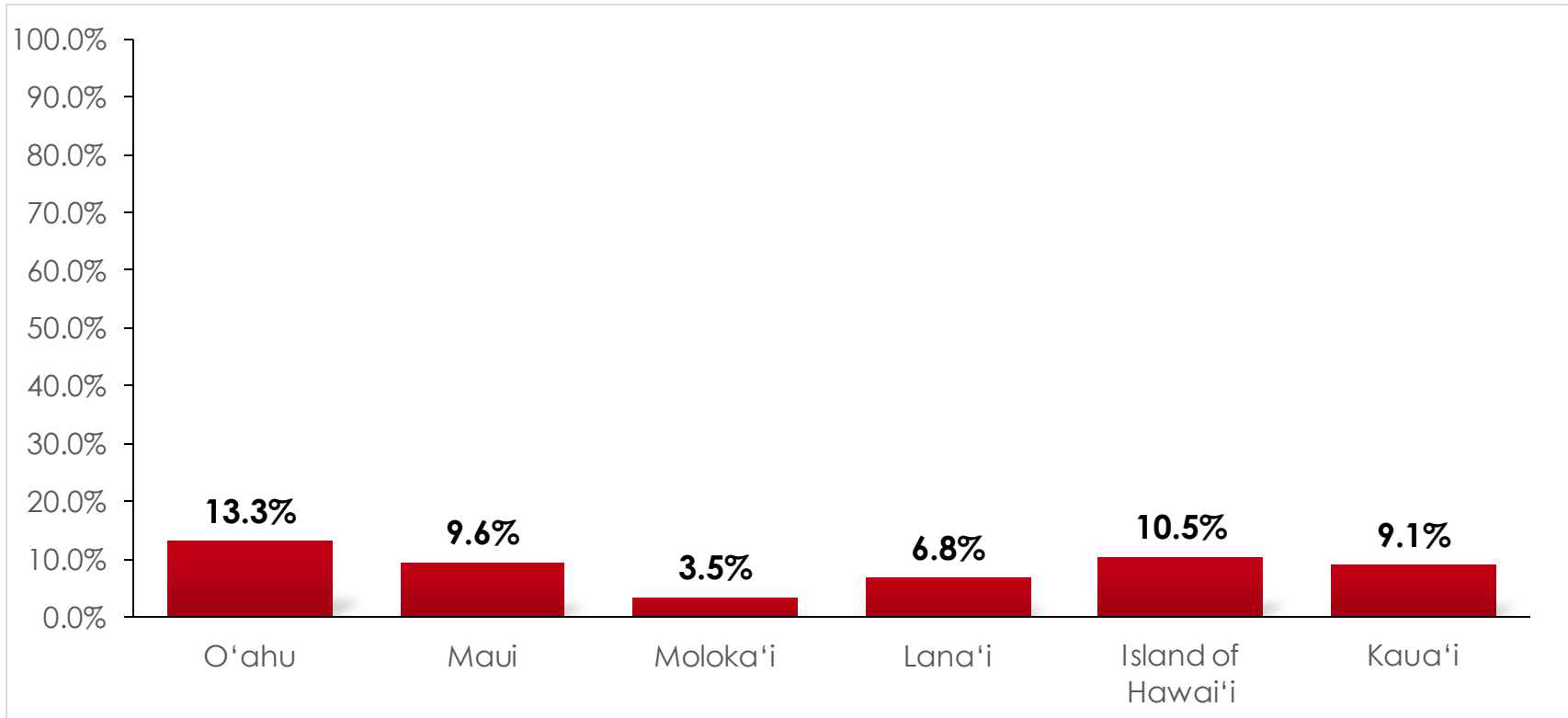




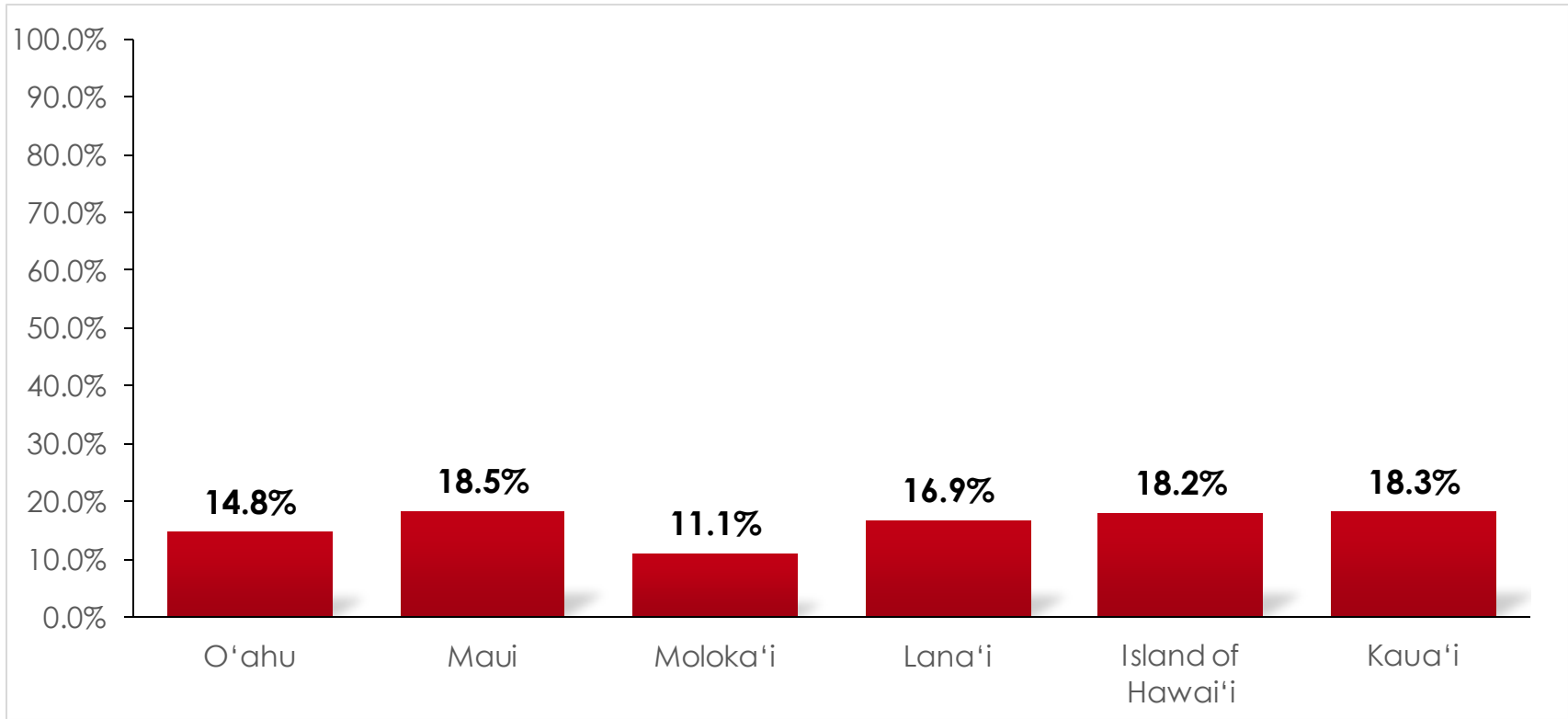
# IMPACT OF HAWAIIAN MUSIC – U.S. WEST



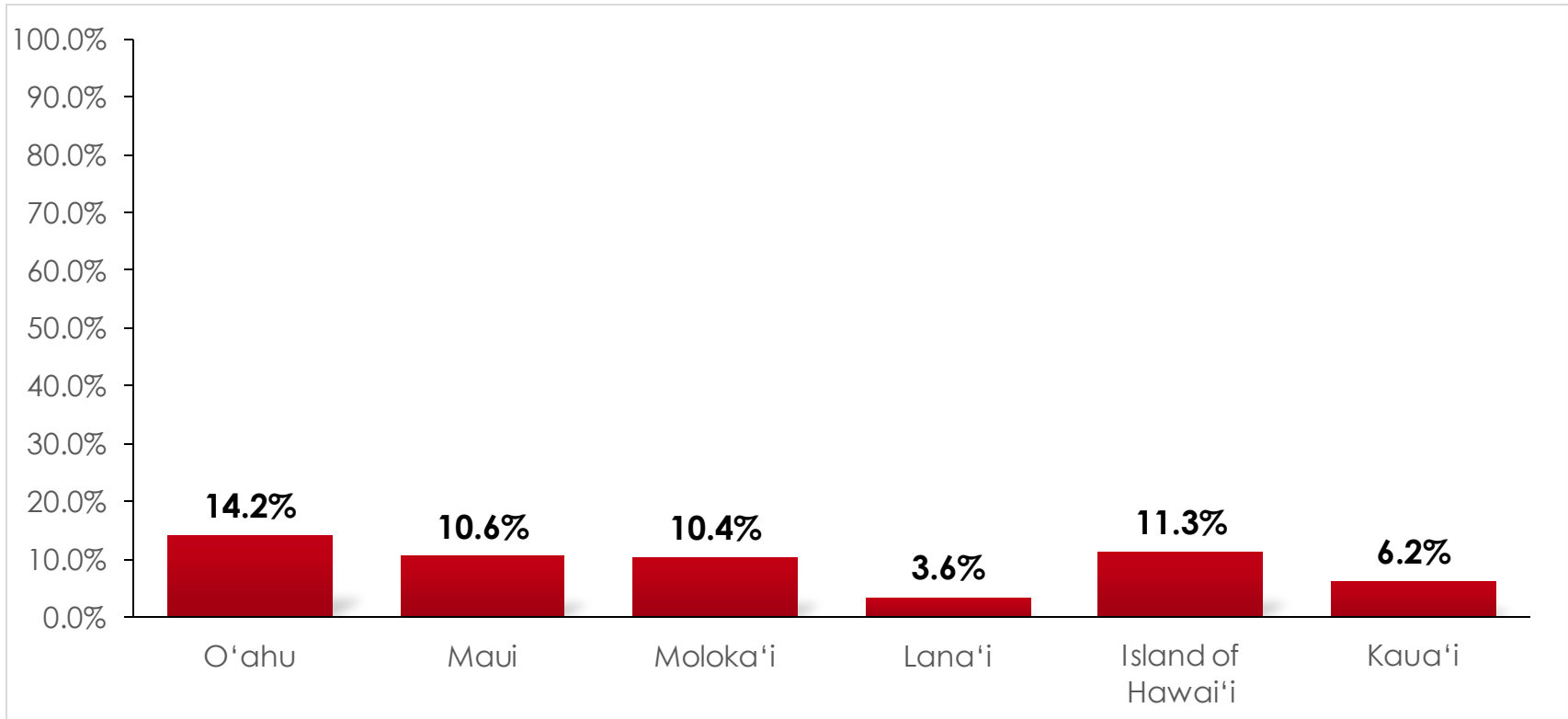
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – U.S. WEST



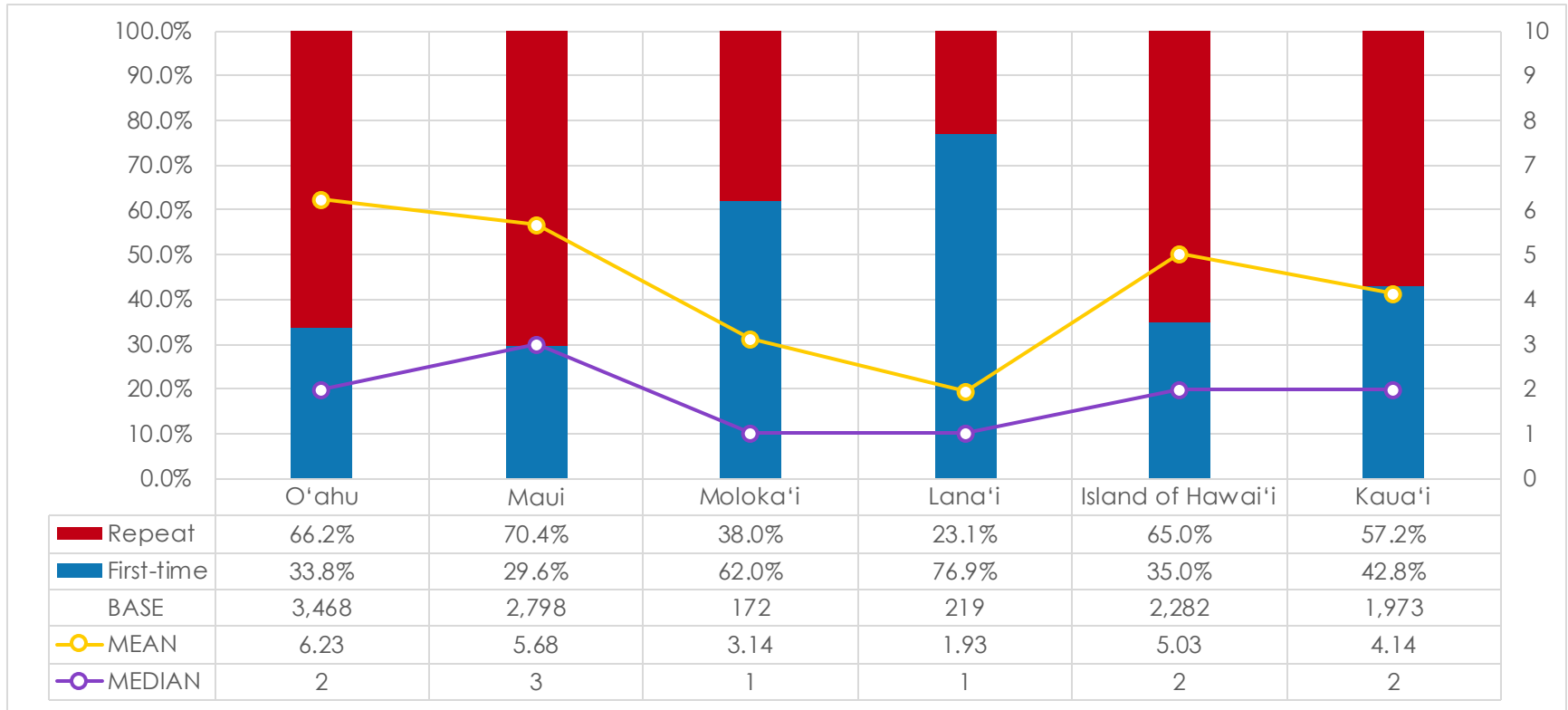
# IMPACT OF OUTDOOR/ SPORTING EVENTS – U.S. WEST



# IMPACT OF HAWAIIAN CULTURAL EVENTS – U.S. WEST



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – U.S. WEST

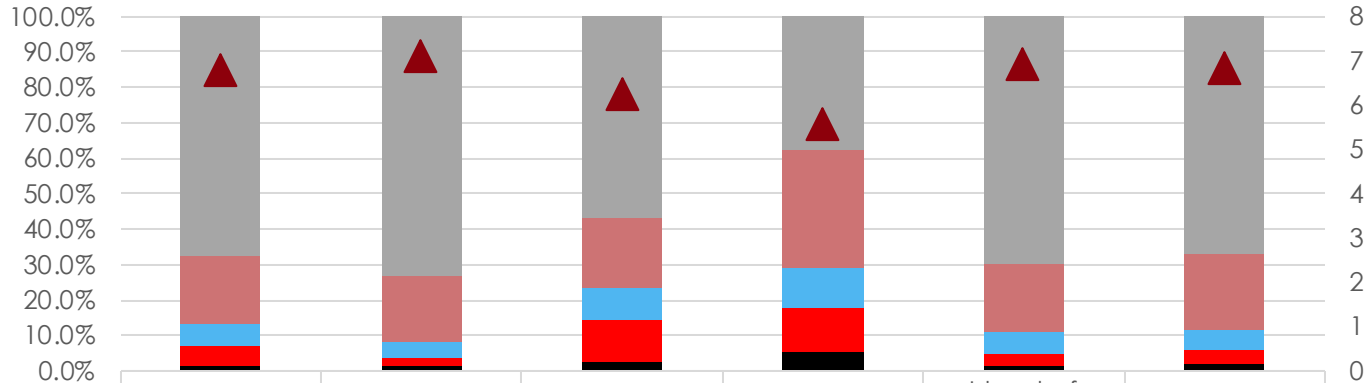


# TRAVEL PARTY MEMBERS – U.S. WEST

	2016	2017	2018	2019
<b>Spouse</b>	63.3%	64.5%	61.1%	60.8%
<b>Other adult family</b>	28.8%	29.1%	29.9%	28.7%
<b>Child under 18</b>	25.4%	22.9%	27.6%	25.2%
<b>Friends/ associates</b>	16.5%	15.9%	15.7%	16.2%
<b>Alone</b>	10.7%	9.0%	9.0%	8.7%
<b>Girlfriend/ boyfriend</b>	6.4%	5.5%	7.1%	7.6%
<b>Same-sex partner</b>	.6%	1.1%	1.2%	1.6%

# LIKELIHOOD OF RETURN VISIT – U.S. WEST

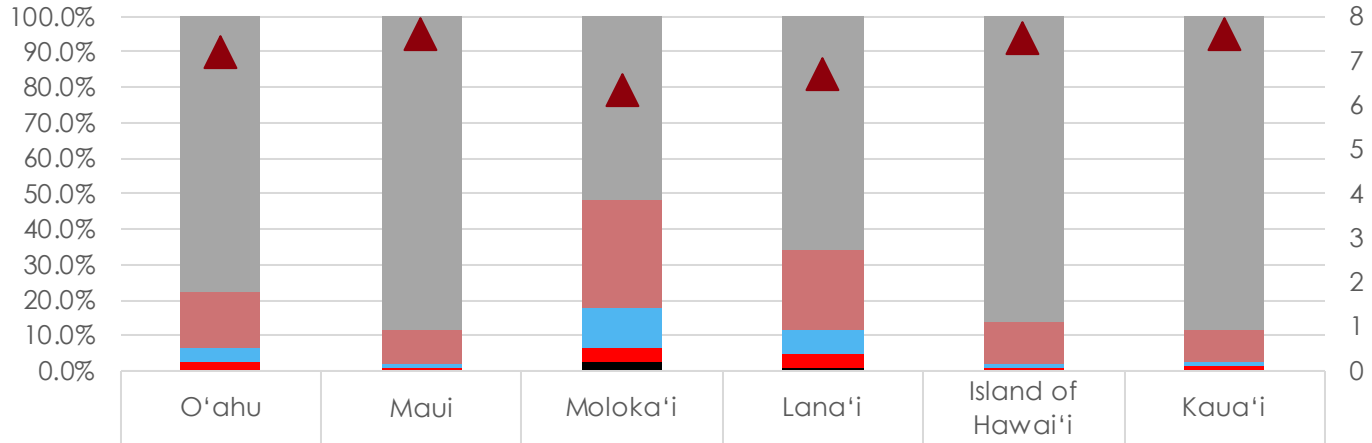
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	67.4%	73.3%	56.7%	37.5%	70.0%	66.8%
■ Somewhat likely (5-6)	19.4%	18.8%	19.9%	33.8%	19.2%	21.6%
■ Somewhat unlikely (3-4)	6.3%	4.4%	9.3%	10.9%	6.0%	5.6%
■ Very unlikely (1-2)	5.7%	2.3%	11.8%	12.8%	3.6%	4.3%
■ Not sure	1.2%	1.2%	2.4%	5.1%	1.2%	1.7%
BASE	3,418	2,768	171	219	2,263	1,954
▲ MEAN	6.75	7.07	6.22	5.56	6.91	6.82

# BRAND/DESTINATION ADVOCACY – U.S. WEST

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



■ Very likely (7-8)	77.5%	88.3%	52.0%	65.6%	86.3%	88.6%
■ Somewhat likely (5-6)	16.3%	9.8%	30.4%	22.9%	11.4%	9.1%
■ Somewhat unlikely (3-4)	3.5%	1.2%	11.1%	6.4%	1.4%	1.1%
■ Very unlikely (1-2)	2.3%	0.5%	4.1%	4.1%	0.8%	0.9%
■ Not sure	0.4%	0.2%	2.4%	0.9%	0.0%	0.3%
BASE	3,402	2,747	171	218	2,243	1,946
▲ MEAN	7.17	7.58	6.32	6.70	7.51	7.56



## ACTIVITIES – SIGHTSEEING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	92.4%	95.0%	96.5%	88.1%	95.4%	96.8%
<b>On own (self-guided)</b>	75.2%	83.8%	78.8%	39.5%	86.4%	87.0%
<b>Helicopter/ airplane</b>	1.4%	4.7%	6.5%	0.9%	5.6%	13.4%
<b>Boat/ submarine/ whale</b>	13.9%	32.0%	13.5%	23.4%	19.9%	29.1%
<b>Visit towns</b>	40.2%	57.6%	52.1%	36.3%	56.1%	61.7%
<b>Limo/ van/ bus tour</b>	11.0%	4.6%	7.1%	17.5%	5.8%	4.7%
<b>Scenic views/ natural landmark</b>	50.7%	56.0%	52.6%	34.8%	60.5%	68.8%
<b>Movie/ TV/ film location</b>	7.4%	0.9%	0.0%	0.9%	0.9%	6.0%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	96.7%	95.8%	95.0%
<b>On own (self-guided)</b>	86.7%	85.1%	83.2%
<b>Helicopter/ airplane</b>	8.7%	6.6%	5.9%
<b>Boat/ submarine/ whale</b>	29.8%	25.9%	24.5%
<b>Visit towns</b>	34.6%	56.3%	53.9%
<b>Limo/ van/ bus tour</b>	9.5%	7.8%	7.5%
<b>Scenic views/ natural landmark</b>	70.3%	61.4%	58.9%
<b>Movie/ TV/ film location</b>	5.4%	4.1%	4.2%

## ACTIVITIES – RECREATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	92.9%	97.2%	88.1%	89.5%	95.7%	96.9%
<b>Beach/ sunbathing</b>	81.3%	87.4%	66.9%	61.9%	80.8%	81.3%
<b>Bodyboard/ SUP</b>	12.0%	15.1%	10.1%	1.4%	12.8%	13.4%
<b>Surfing</b>	6.8%	6.5%	2.4%	1.4%	3.1%	7.3%
<b>Canoeing/ kayak</b>	5.3%	4.2%	11.9%	0.0%	8.6%	14.0%
<b>Swim- ocean</b>	61.8%	71.8%	46.7%	44.6%	64.8%	64.9%
<b>Snorkel</b>	33.9%	55.1%	30.2%	41.3%	53.2%	45.9%
<b>Windsurf/ Kitesurf</b>	0.4%	0.5%	0.0%	0.0%	0.1%	0.2%
<b>Jet ski/ Parasail</b>	2.3%	2.7%	0.0%	0.0%	1.0%	0.2%
<b>Scuba</b>	2.3%	4.1%	4.1%	5.1%	3.9%	2.3%
<b>Fishing</b>	2.0%	3.0%	5.9%	2.3%	5.0%	3.5%
<b>Golf</b>	2.9%	8.1%	5.4%	7.3%	8.1%	8.2%

# STATEWIDE - ACTIVITIES – RECREATION – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	96.5%	97.0%	96.4%
<b>Beach/ sunbathing</b>	85.3%	85.5%	84.7%
<b>Bodyboard/ Standup paddle board</b>	20.3%	17.0%	14.0%
<b>Surfing</b>	7.1%	6.7%	6.3%
<b>Canoeing/ kayak</b>	10.2%	8.7%	8.0%
<b>Swim- ocean</b>	NA	68.3%	67.7%
<b>Snorkel</b>	NA	49.9%	48.1%
<b>Windsurf/ Kitesurf</b>	0.4%	0.2%	0.3%
<b>Jet ski/ Parasail</b>	2.4%	2.3%	1.8%
<b>Scuba</b>	4.1%	3.1%	3.4%
<b>Fishing</b>	3.7%	3.4%	3.5%
<b>Golf</b>	9.1%	7.4%	6.9%

## ACTIVITIES – RECREATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	92.9%	97.2%	88.1%	89.5%	95.7%	96.9%
<b>Run/ Jog/ Fitness walk</b>	21.7%	29.3%	16.6%	9.2%	24.4%	27.6%
<b>Spa</b>	7.6%	11.7%	1.2%	10.1%	7.4%	9.1%
<b>Hiking</b>	40.5%	42.2%	47.3%	34.9%	47.7%	53.4%
<b>Backpack/Camping</b>	1.6%	1.4%	1.2%	0.9%	1.6%	2.4%
<b>Agritourism</b>	11.5%	10.8%	20.1%	6.0%	17.2%	11.3%
<b>Sport event/ tournament</b>	3.7%	2.2%	1.8%	2.3%	2.7%	0.8%
<b>Park/ botanical garden</b>	30.3%	29.9%	22.4%	11.9%	40.5%	38.5%
<b>Waterpark</b>	2.1%	1.1%	0.0%	0.5%	0.8%	0.9%
<b>Mountain tube/ waterfall rappel</b>	0.4%	0.6%	0.6%	0.5%	1.2%	8.3%
<b>Zip-lining</b>	3.4%	7.3%	0.0%	0.9%	5.4%	8.4%
<b>Skydiving</b>	1.0%	0.2%	0.0%	0.0%	0.4%	0.5%
<b>All-terrain vehicle (ATV)</b>	2.8%	1.1%	1.2%	5.5%	2.1%	5.3%
<b>Horseback riding</b>	1.8%	1.1%	1.2%	1.8%	2.5%	2.5%

# STATEWIDE – ACTIVITIES – RECREATION – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	96.5%	97.0%	96.4%
<b>Run/ Jog/ Fitness walk</b>	35.5%	30.8%	26.3%
<b>Spa</b>	9.2%	10.1%	9.6%
<b>Hiking</b>	28.5%	32.4%	47.0%
<b>Backpack/Camp</b>	*	*	1.8%
<b>Agritourism</b>	9.9%	13.6%	13.5%
<b>Sport event/ tournament</b>	1.9%	2.8%	2.8%
<b>Park/ botanical garden</b>	40.7%	38.2%	35.4%
<b>Waterpark</b>	NA	1.5%	1.4%
<b>Mountain tube/ waterfall rappel</b>	NA	2.0%	2.3%
<b>Zip-lining</b>	NA	6.0%	6.1%
<b>Skydiving</b>	NA	0.4%	0.6%
<b>All-terrain vehicle (ATV)</b>	NA	2.9%	3.0%
<b>Horseback riding</b>	NA	2.3%	2.1%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.9%	98.4%	91.7%	79.4%	97.9%	98.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	17.9%	23.3%	7.7%	21.7%	16.3%	22.3%
<b>Live music/ stage show</b>	29.8%	29.4%	21.8%	6.4%	26.4%	28.1%
<b>Nightclub/ dancing/ bar/ karaoke</b>	11.4%	6.2%	2.9%	2.3%	8.8%	6.2%
<b>Fine dining</b>	45.7%	60.3%	20.1%	27.6%	49.3%	53.6%
<b>Family restaurant</b>	60.0%	60.4%	50.4%	23.4%	63.6%	59.1%
<b>Fast food</b>	42.3%	28.3%	26.6%	6.0%	30.5%	29.7%
<b>Food truck</b>	36.4%	27.4%	21.3%	1.4%	15.2%	36.7%
<b>Café/ coffee house</b>	43.2%	44.5%	32.4%	17.4%	48.7%	43.7%
<b>Ethnic dining</b>	35.1%	26.8%	11.2%	3.7%	32.4%	28.3%
<b>Prepared own meal</b>	33.5%	55.5%	58.7%	16.9%	57.3%	61.3%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	98.9%	98.4%	98.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	27.3%	23.0%	20.9%
<b>Live music/ stage show</b>	31.6%	32.2%	30.3%
<b>Nightclub/ dancing/ bar/ karaoke</b>	9.3%	9.4%	8.9%
<b>Fine dining</b>	53.2%	53.6%	53.1%
<b>Family restaurant</b>	70.8%	62.8%	61.8%
<b>Fast food</b>	39.4%	36.5%	34.7%
<b>Food truck</b>	NA	30.7%	30.6%
<b>Café/ coffee house</b>	42.5%	46.6%	46.0%
<b>Ethnic dining</b>	30.5%	31.9%	31.9%
<b>Prepared own meal</b>	52.2%	55.1%	52.1%



## ACTIVITIES – SHOPPING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	94.2%	96.2%	85.8%	60.2%	95.8%	96.4%
<b>Mall/ department store</b>	53.4%	43.3%	1.2%	3.2%	31.3%	25.3%
<b>Designer boutique</b>	15.8%	19.9%	0.6%	5.1%	13.1%	17.8%
<b>Hotel/ resort store</b>	35.8%	35.0%	7.0%	11.5%	30.6%	23.3%
<b>Swap meet/ flea market</b>	21.3%	14.8%	10.1%	1.4%	15.5%	8.3%
<b>Discount/ outlet store</b>	15.2%	20.3%	1.8%	0.0%	11.9%	12.6%
<b>Supermarket</b>	50.3%	71.1%	52.1%	18.4%	69.4%	71.6%
<b>Farmer's market</b>	22.0%	30.9%	45.6%	4.1%	51.9%	44.5%
<b>Convenience store</b>	51.1%	46.5%	28.3%	14.7%	41.8%	39.6%
<b>Duty free store</b>	5.8%	3.7%	1.2%	1.4%	2.0%	1.8%
<b>Local shop/ artisan</b>	51.9%	68.4%	59.1%	34.8%	64.9%	72.9%

# STATEWIDE - ACTIVITIES – SHOPPING – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	97.0%	96.7%	95.9%
<b>Mall/ department store</b>	43.6%	42.4%	42.0%
<b>Designer boutique</b>	22.3%	17.5%	17.3%
<b>Hotel/ resort store</b>	33.0%	33.5%	33.1%
<b>Swap meet/ flea market</b>	22.8%	17.4%	16.7%
<b>Discount/ outlet store</b>	20.9%	17.3%	15.9%
<b>Supermarket</b>	58.1%	68.2%	66.1%
<b>Farmer's market</b>	33.0%	37.2%	37.0%
<b>Convenience store</b>	42.9%	46.5%	46.9%
<b>Duty free store</b>	3.1%	3.7%	3.8%
<b>Local shop/ artisan</b>	68.4%	65.7%	64.7%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	70.0%	64.1%	73.3%	39.5%	69.0%	63.0%
<b>Historic military site</b>	35.5%	3.7%	3.6%	1.8%	6.8%	5.0%
<b>Other historical site</b>	21.2%	20.6%	53.2%	17.1%	36.0%	25.8%
<b>Museum/ art gallery</b>	14.2%	20.9%	13.0%	13.8%	18.9%	15.6%
<b>Luau/ Polynesian show/ hula show</b>	32.8%	26.9%	4.7%	3.6%	23.8%	25.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	8.2%	6.5%	3.6%	2.3%	5.5%	4.3%
<b>Play/ concert/ theatre</b>	4.7%	4.8%	1.8%	0.5%	3.6%	3.4%
<b>Art/ craft fair</b>	7.2%	17.0%	13.6%	1.4%	16.5%	17.8%
<b>Festival event</b>	5.8%	4.0%	9.4%	6.9%	5.5%	4.6%

## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	74.1%	71.8%	68.7%
<b>Historic military site</b>	27.5%	18.6%	15.6%
<b>Other historical site</b>	30.9%	29.2%	26.8%
<b>Museum/ art gallery</b>	22.9%	19.2%	18.4%
<b>Luau/ Polynesian show/ hula show</b>	37.3%	32.0%	29.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.8%	7.1%	6.8%
<b>Play/ concert/ theatre</b>	4.5%	4.7%	4.5%
<b>Art/ craft fair</b>	14.4%	15.0%	14.6%
<b>Festival event</b>	10.1%	5.3%	5.6%

## ACTIVITIES – TRANSPORTATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	90.1%	94.7%	75.7%	66.6%	91.9%	95.1%
<b>Airport shuttle</b>	19.4%	11.1%	8.2%	16.5%	11.5%	14.6%
<b>Trolley</b>	3.5%	3.3%	0.0%	1.4%	2.5%	0.5%
<b>Public bus</b>	8.7%	2.1%	0.6%	2.3%	0.6%	0.7%
<b>Tour bus/ tour van</b>	13.0%	4.7%	10.0%	25.8%	6.1%	6.2%
<b>Taxi/ limo</b>	10.5%	3.3%	5.9%	11.0%	4.2%	2.1%
<b>Rental car</b>	61.9%	87.4%	59.7%	18.0%	84.6%	88.9%
<b>Ride share</b>	27.4%	10.5%	2.3%	0.9%	8.3%	5.1%
<b>Bicycle rental</b>	1.7%	1.2%	2.4%	0.5%	1.6%	4.6%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – U.S. WEST

	2017	2018	2019
<b>TOTAL</b>	95.1%	92.8%	92.3%
<b>Airport shuttle</b>	19.6%	18.4%	15.6%
<b>Trolley</b>	2.5%	2.3%	2.8%
<b>Public bus</b>	5.2%	4.4%	3.9%
<b>Tour bus/ tour van</b>	9.7%	8.9%	8.7%
<b>Taxi/ limo</b>	13.4%	7.6%	6.2%
<b>Rental car</b>	82.8%	80.0%	79.3%
<b>Ride share</b>	NA	12.1%	15.1%
<b>Bicycle rental</b>	NA	2.7%	2.2%

## ACTIVITIES – OTHER – U.S. WEST

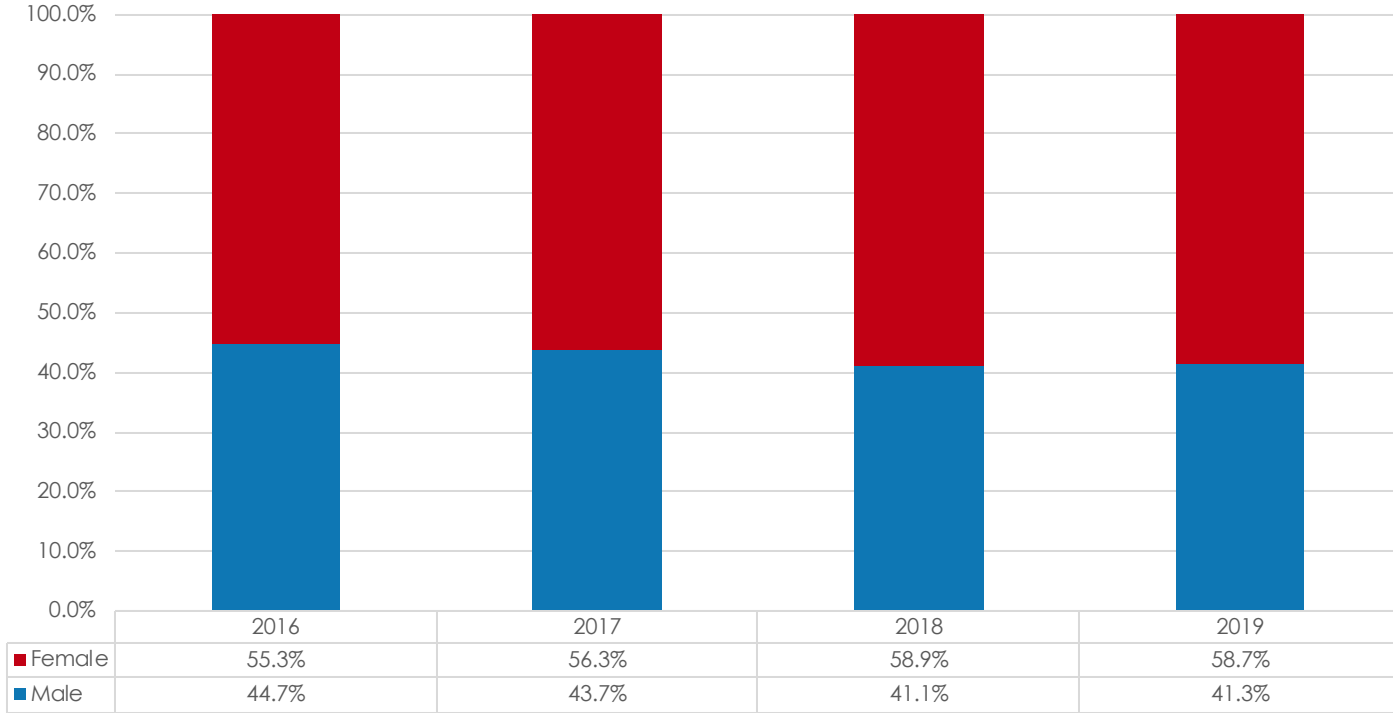
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	37.1%	21.4%	29.6%	11.9%	30.5%	20.2%
<b>Visit friends/ family</b>	36.4%	21.0%	29.0%	11.0%	29.9%	19.5%
<b>Volunteer- non-profit</b>	1.2%	0.5%	0.6%	0.9%	1.2%	0.9%

## ACTIVITIES – OTHER – U.S. WEST

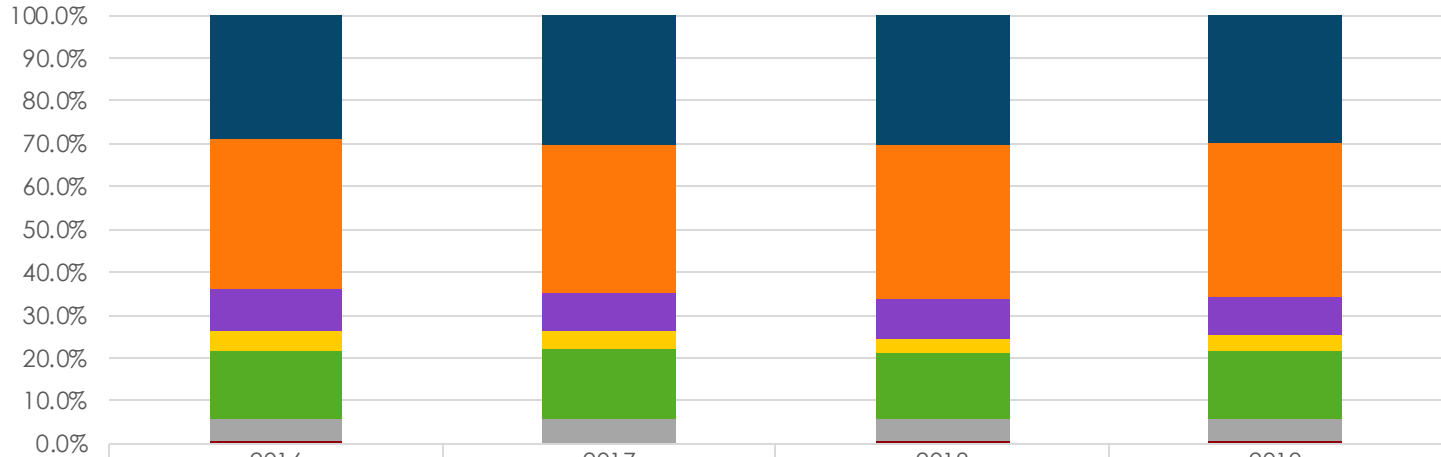
	2018	2019
<b>TOTAL</b>	31.3%	29.7%
<b>Visit friends/ family</b>	30.5%	29.0%
<b>Volunteer- non-profit</b>	1.5%	1.0%



# VISITOR PROFILE – GENDER – U.S. WEST

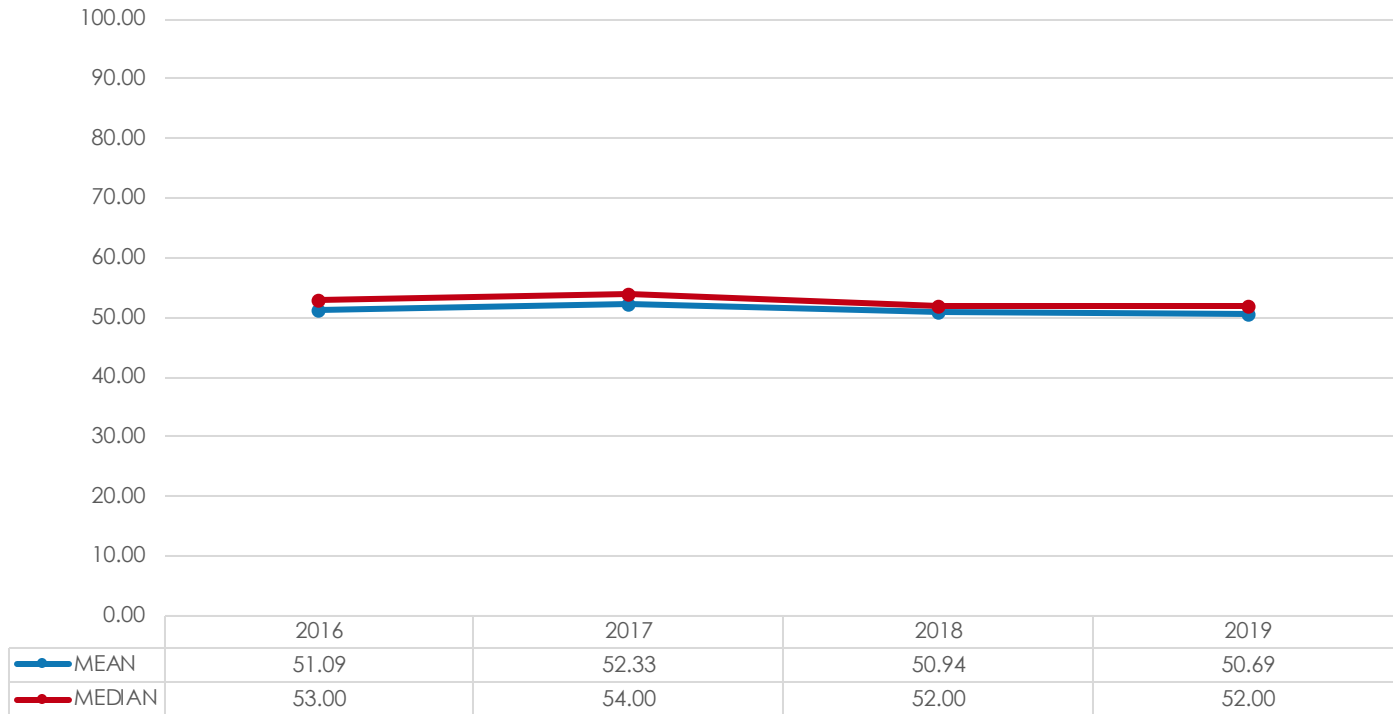


# VISITOR PROFILE – EDUCATION – U.S. WEST

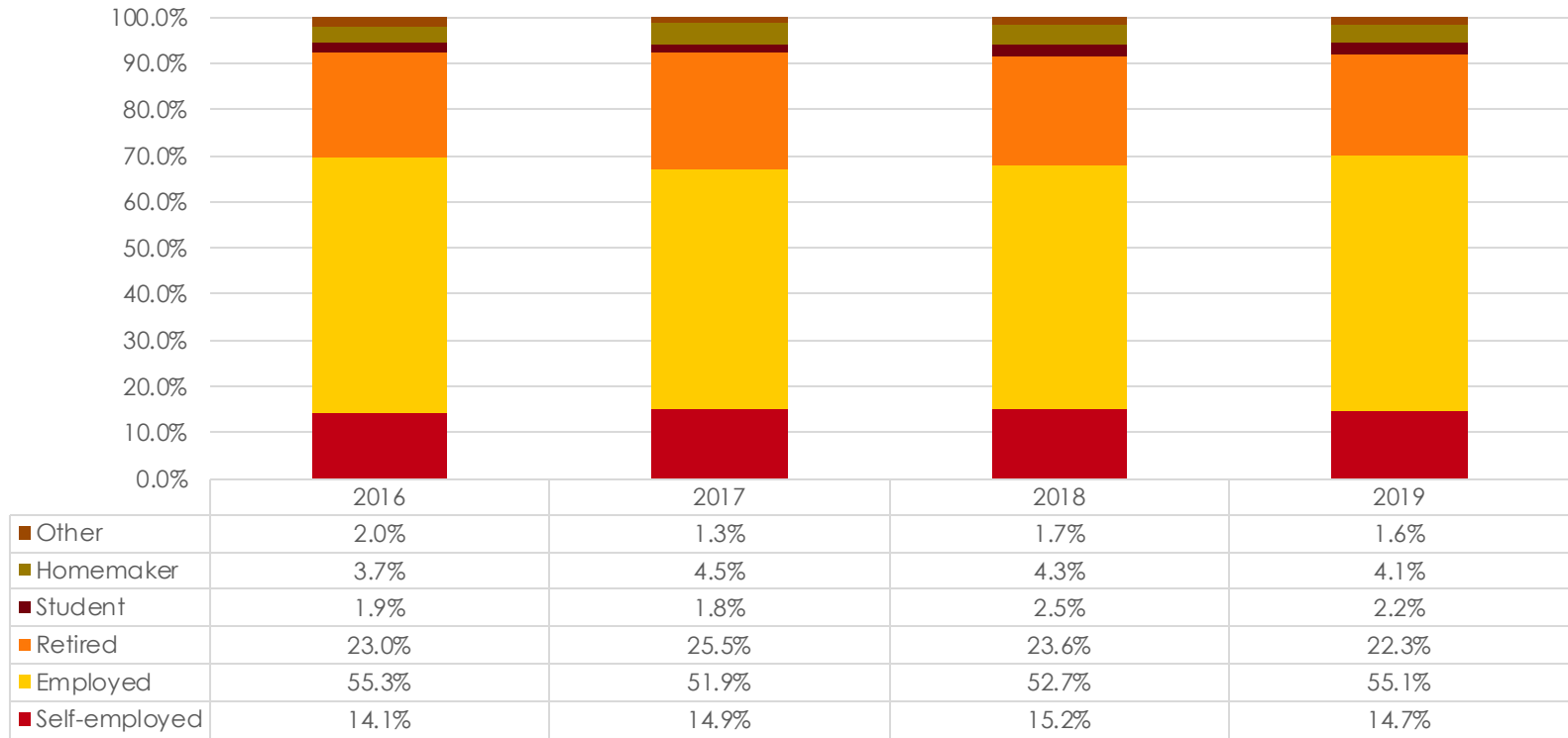


	2016	2017	2018	2019
■ Post-Graduate	28.7%	30.3%	30.3%	29.9%
■ College Grad	35.1%	34.6%	35.8%	35.8%
■ Associate Degree	9.8%	9.0%	9.3%	9.0%
■ Vocational/ Tech	4.8%	4.1%	3.4%	3.6%
■ Some College	15.9%	16.3%	15.5%	15.9%
■ H.S. Grad	5.3%	5.5%	5.3%	5.4%
■ Some / No H.S.	0.4%	0.2%	0.4%	0.4%

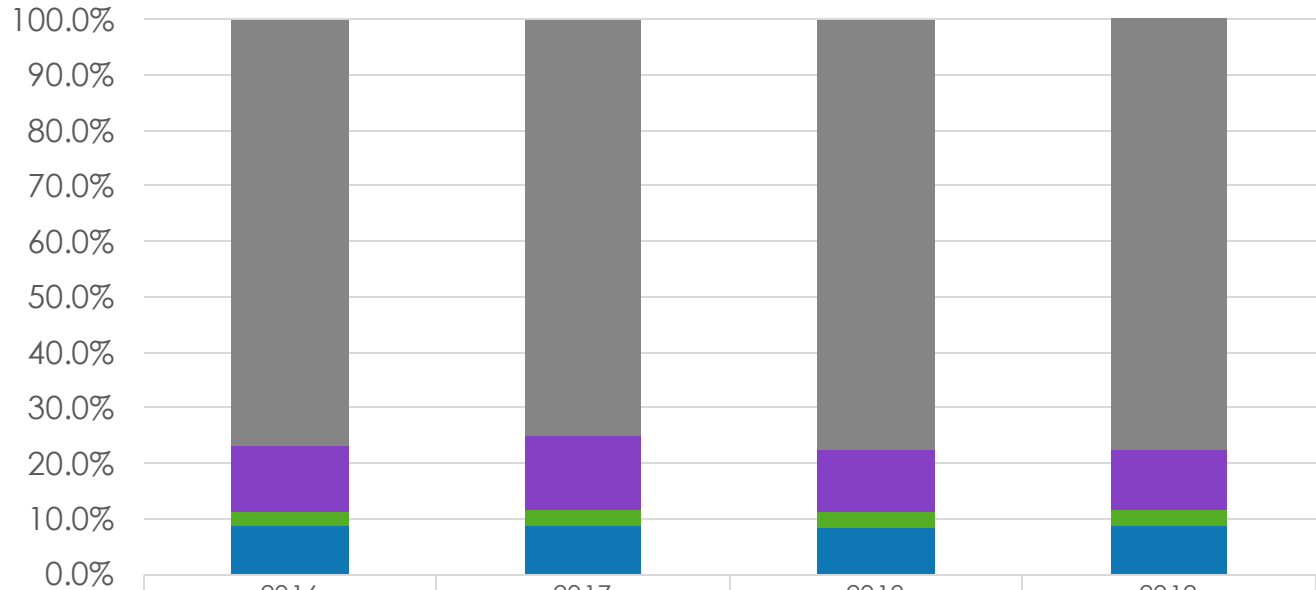
# VISITOR PROFILE – AGE – U.S. WEST



# VISITOR PROFILE – EMPLOYMENT STATUS – U.S. WEST



# VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. WEST

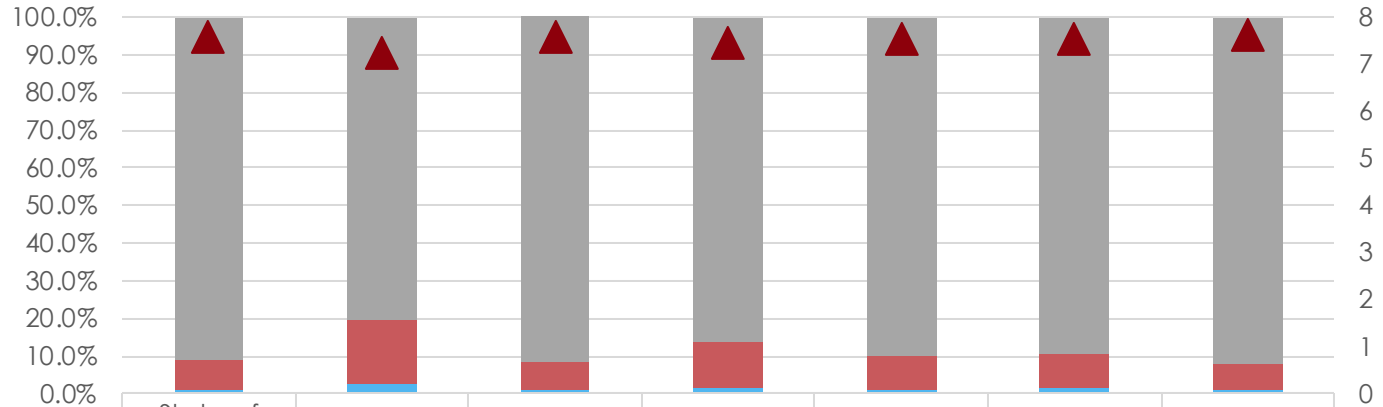


	2016	2017	2018	2019
Do not nor plan to purchase	76.9%	75.3%	77.5%	77.7%
Plan to in future	11.8%	13.2%	11.4%	10.9%
Other Property Type	2.6%	2.7%	2.9%	2.7%
Timeshare	8.7%	8.8%	8.2%	8.8%

# SECTION – U.S. EAST

# OVERALL SATISFACTION – MOST RECENT VISIT – U.S. EAST

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	91.1%	80.2%	91.8%	86.4%	89.9%	89.3%	92.0%
■ Above Average (5-6)	7.7%	17.0%	7.5%	12.0%	9.2%	9.0%	6.8%
■ Below Average (3-4)	1.1%	2.5%	0.6%	1.6%	0.6%	1.5%	1.1%
■ Poor (1-2)	0.1%	0.3%	0.2%	0.0%	0.3%	0.2%	0.1%
BASE	9,520	5,514	3,768	195	337	3,105	2,379
▲ MEAN	7.59	7.26	7.60	7.45	7.55	7.52	7.63

# PRIMARY TRIP PURPOSE U.S. EAST

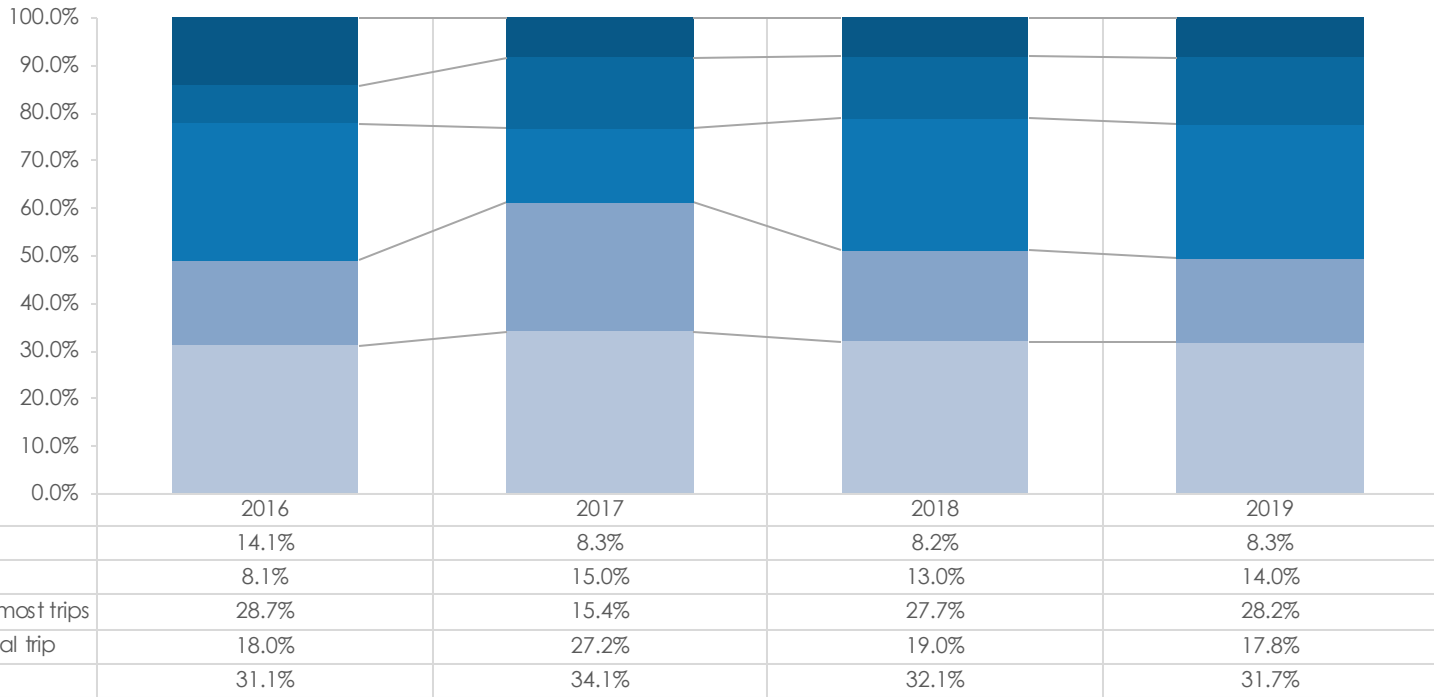
	2018	2019
Vacation	55.8%	56.2%
Anniversary/ birthday	9.0%	9.9%
Visit friends/ relatives	9.3%	8.6%
Business trip	4.7%	4.7%
Honeymoon	3.8%	3.9%
Convention, conference, seminar	4.1%	2.9%
Attend wedding/ vow renewal	2.8%	2.3%
Vacation home/ timeshare	2.2%	2.0%
Family gathering/ reunion	1.6%	2.0%



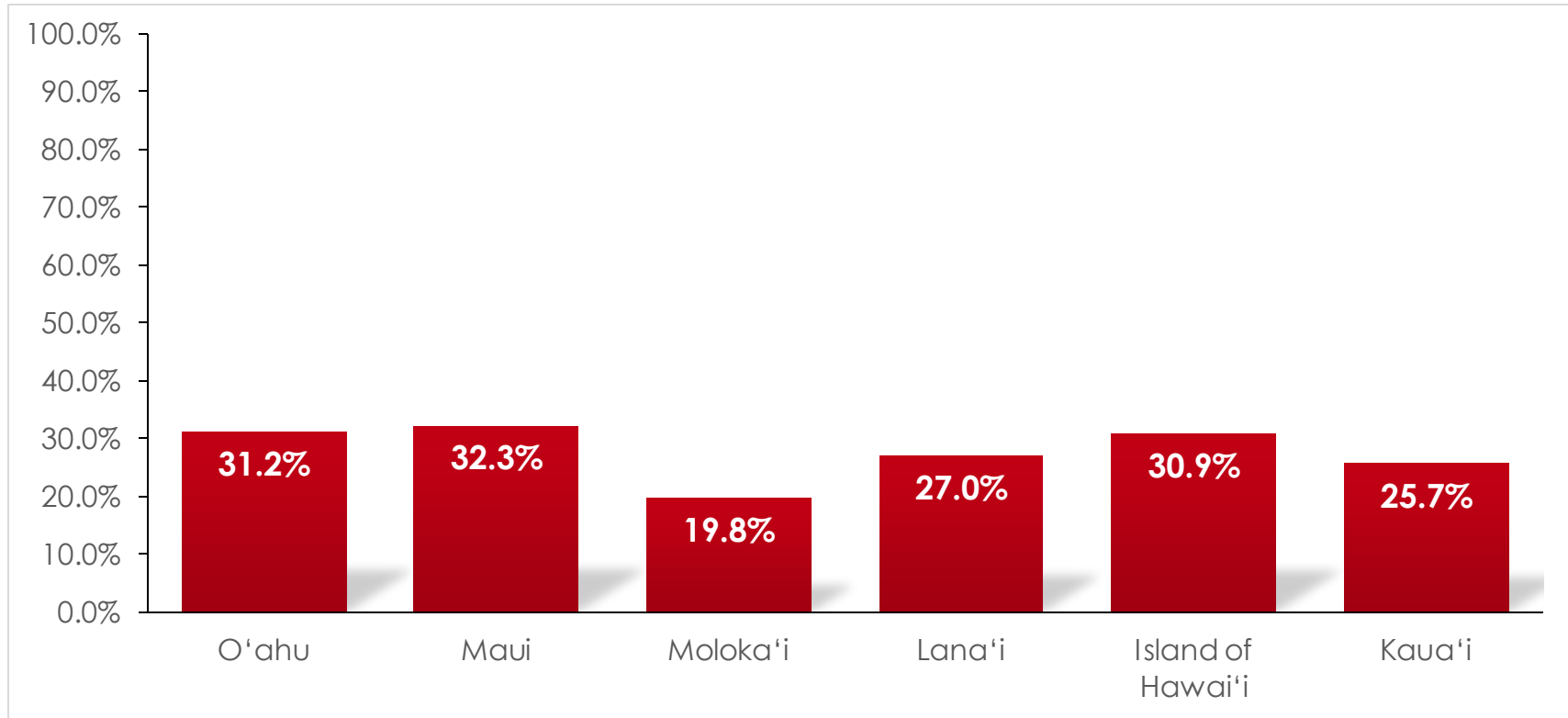
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE U.S. EAST

	2018	2019
Vacation	82.6%	82.2%
Anniversary/ birthday	16.0%	16.8%
Visit friends/ relatives	16.1%	15.6%
Business trip	6.1%	6.1%
Family gathering/ reunion	5.2%	5.5%
Honeymoon	4.5%	4.6%
Vacation home/ timeshare	4.8%	4.4%
Convention, conference, seminar	5.1%	3.6%

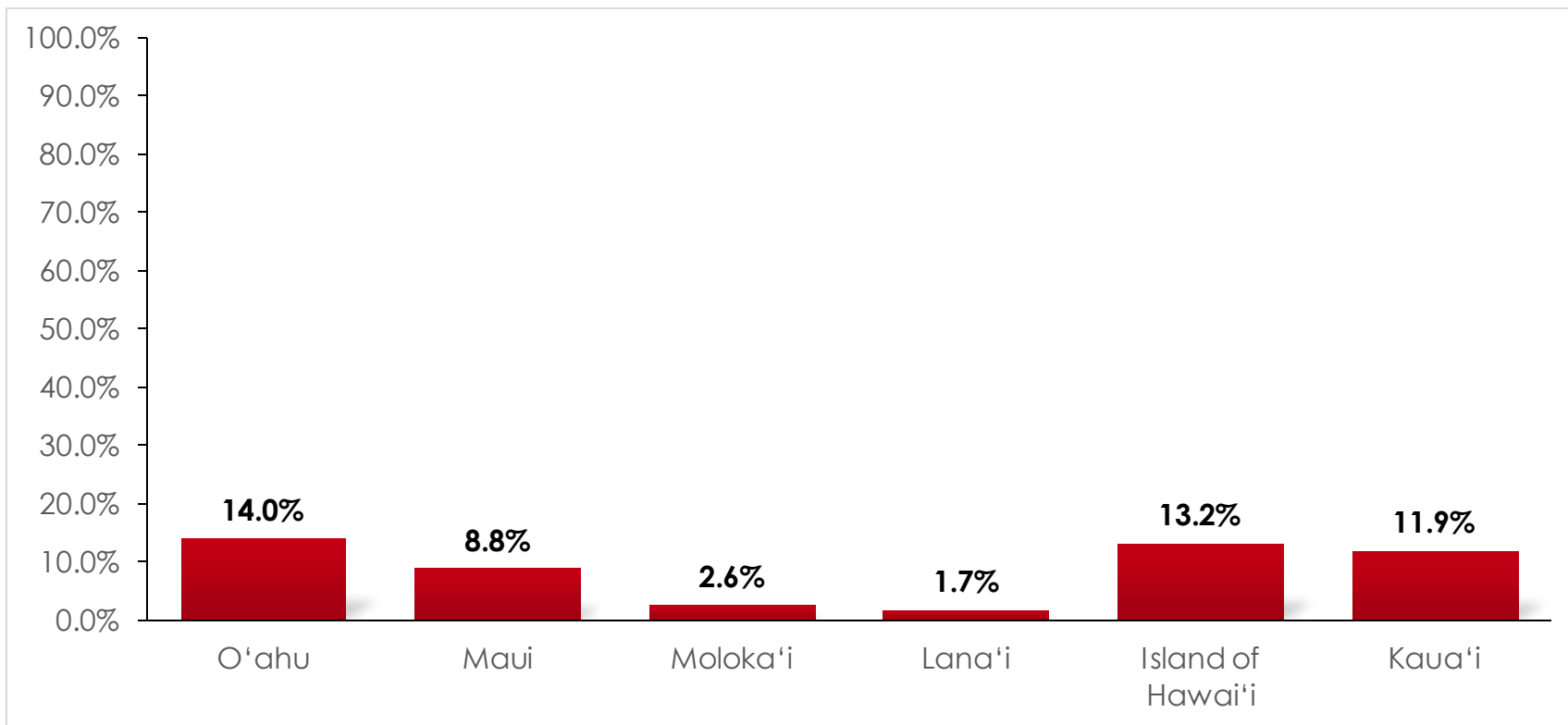
# VACATION TRIP DESCRIPTION – U.S. EAST



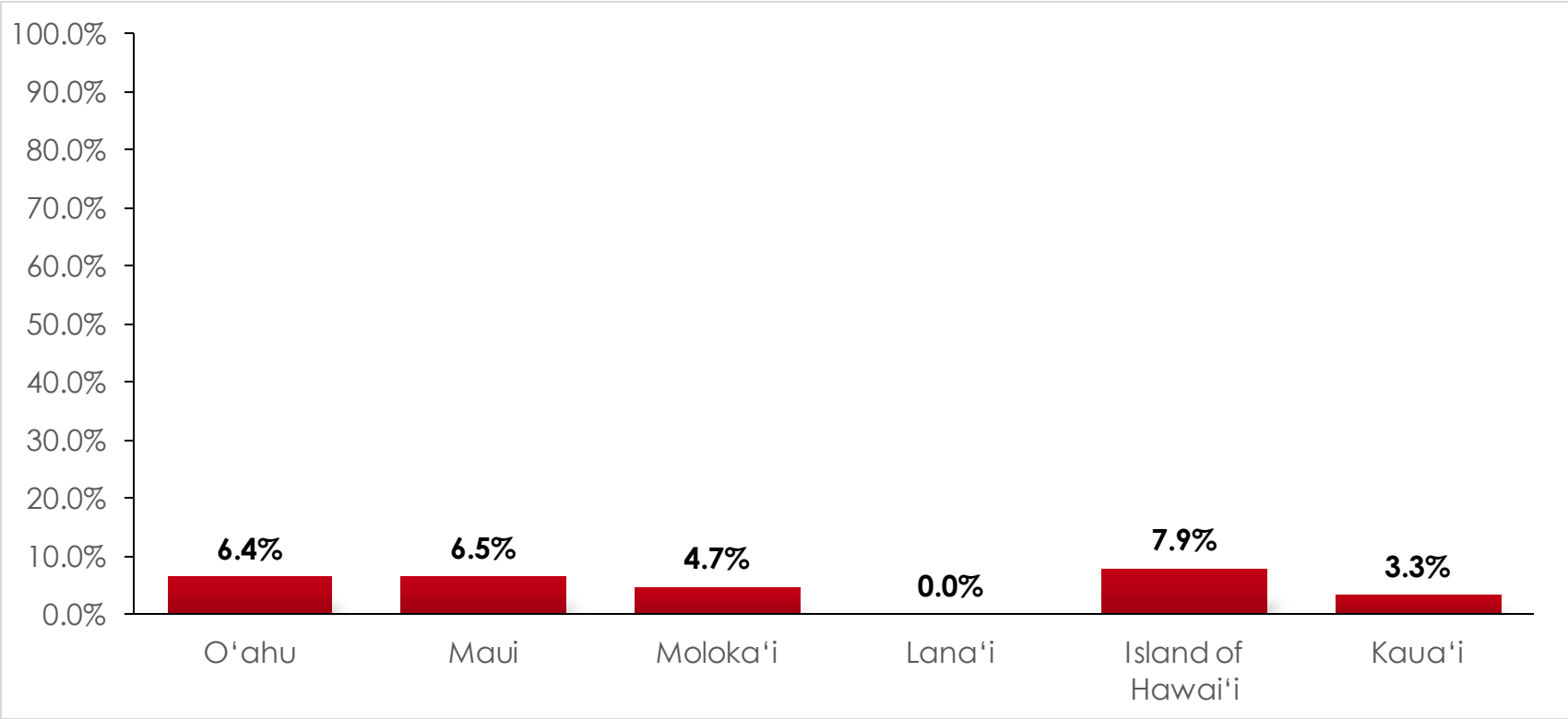
# ADVERTISING AWARENESS – U.S. EAST



# IMPACT OF LOCATION FILMING – U.S. EAST

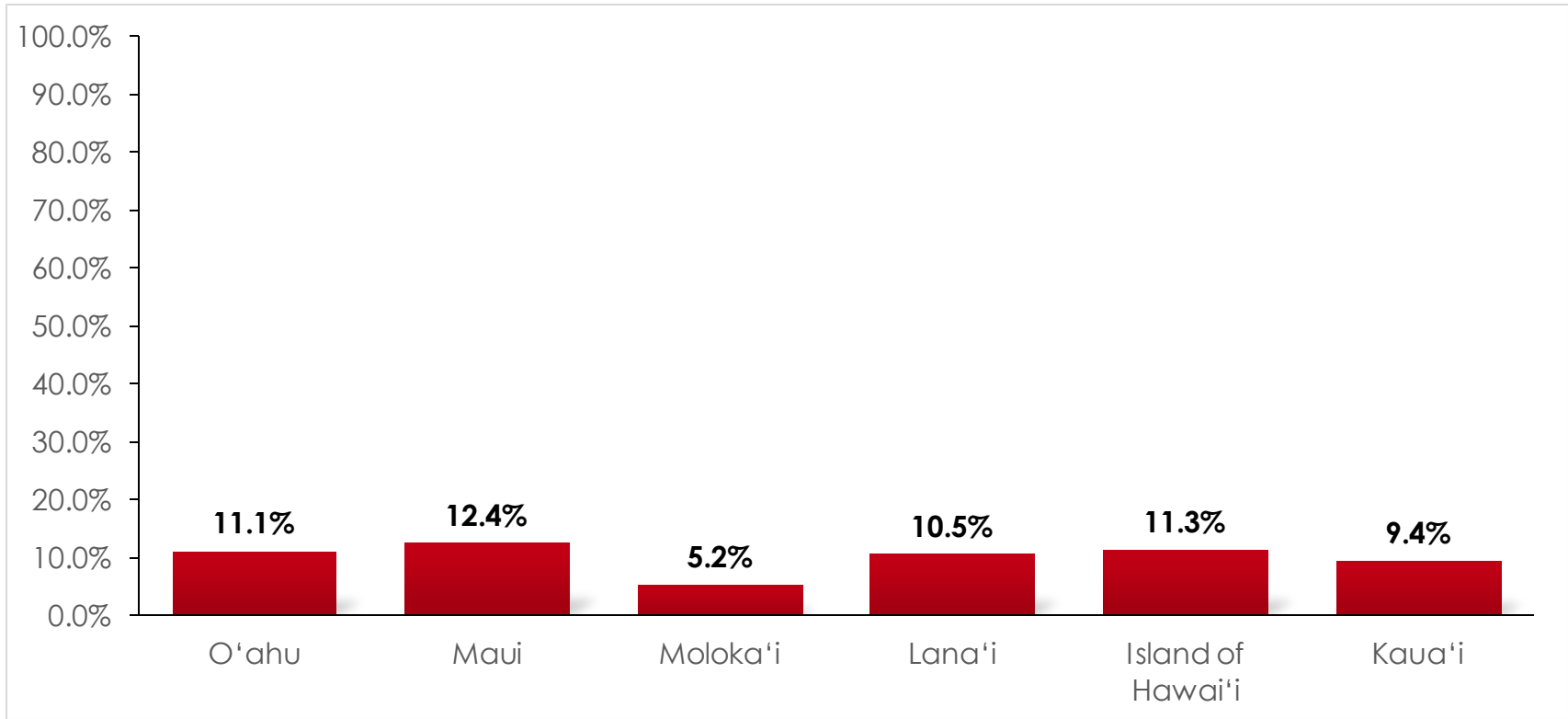


# IMPACT OF HAWAIIAN MUSIC – U.S. EAST

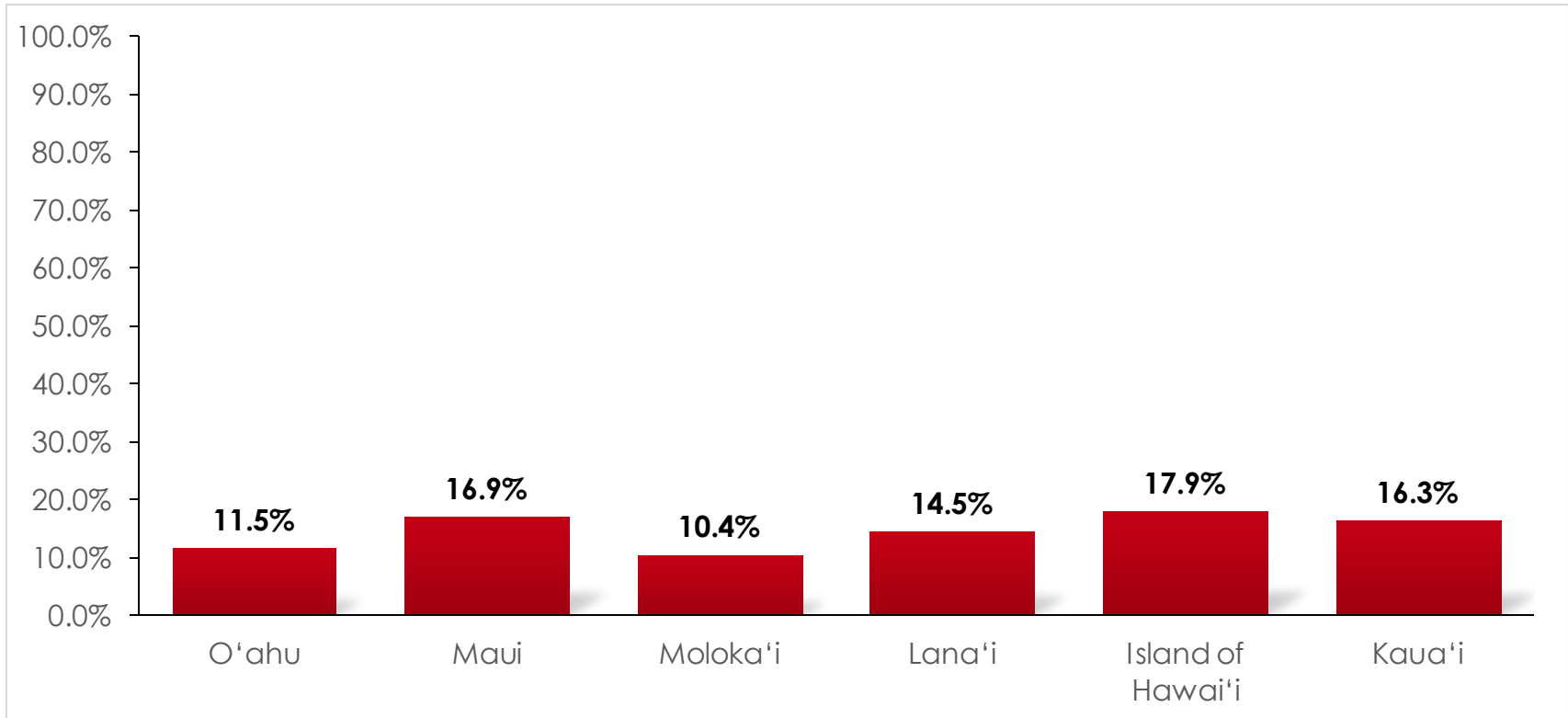


141 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

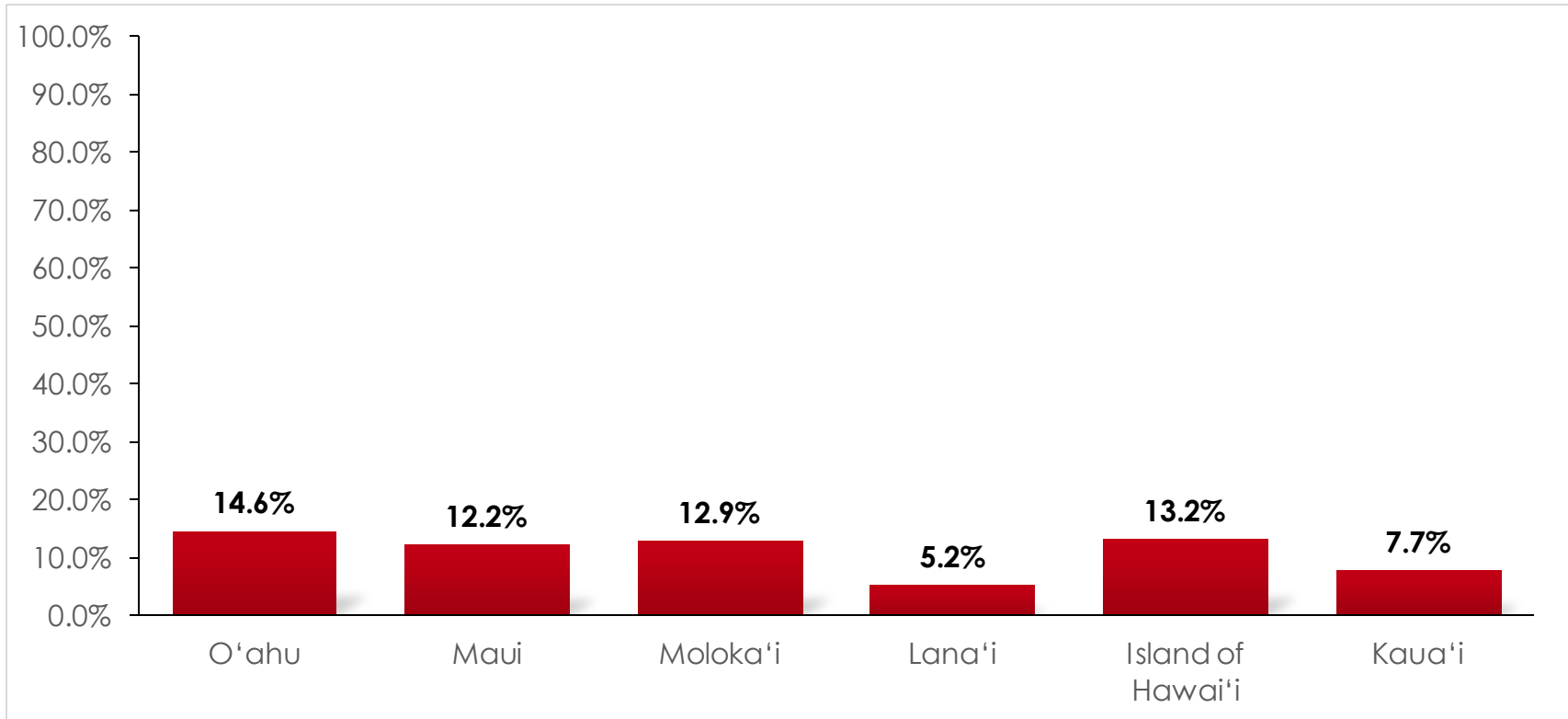
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – U.S. EAST



# IMPACT OF OUTDOOR/ SPORTING EVENT – U.S. EAST

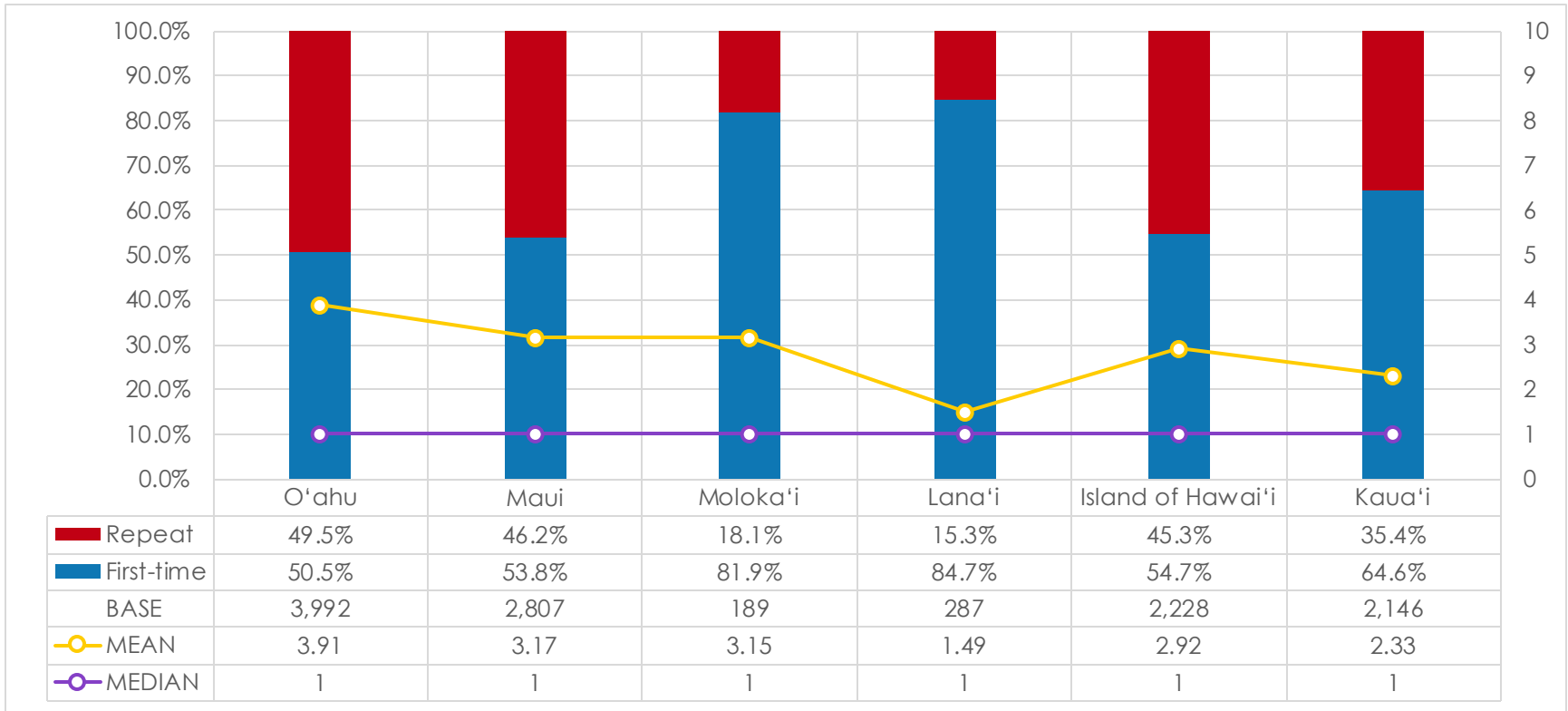


# IMPACT OF HAWAIIAN CULTURAL EVENTS – U.S. EAST





# 1<sup>ST</sup> TIME VS REPEAT VISITOR – U.S. EAST

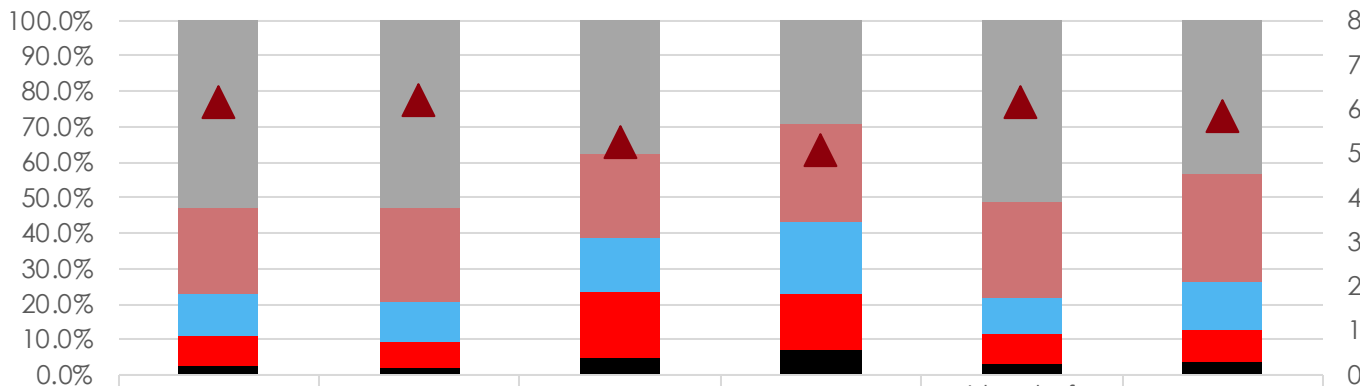


# TRAVEL PARTY MEMBERS – U.S. EAST

	2016	2017	2018	2019
Spouse	62.9%	60.9%	61.0%	62.0%
Other adult family	25.5%	24.6%	26.5%	27.6%
Child under 18	18.1%	15.6%	19.5%	18.9%
Friends/ associates	17.6%	14.9%	17.5%	16.6%
Alone	11.5%	12.3%	10.3%	9.9%
Girlfriend/ boyfriend	5.7%	6.5%	6.6%	6.2%
Same-sex partner	.8%	1.2%	1.2%	1.2%

# LIKELIHOOD OF RETURN VISIT – U.S. EAST

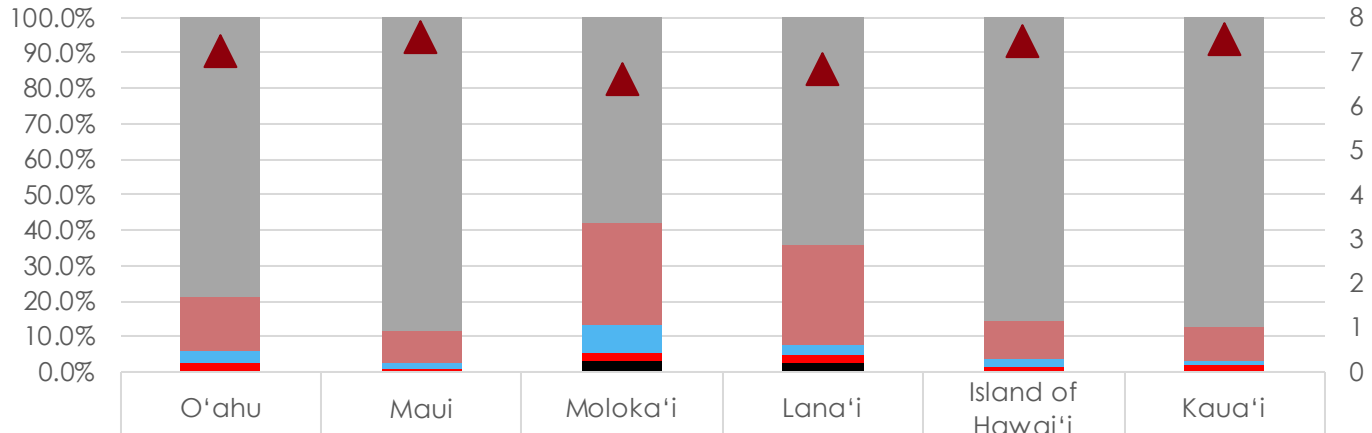
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	52.9%	52.8%	37.5%	29.5%	51.1%	43.2%
■ Somewhat likely (5-6)	24.5%	26.6%	23.8%	27.6%	27.2%	30.4%
■ Somewhat unlikely (3-4)	11.5%	11.1%	15.3%	20.3%	10.3%	13.5%
■ Very unlikely (1-2)	8.7%	7.3%	18.3%	15.7%	8.5%	9.4%
■ Not sure	2.4%	2.2%	5.0%	7.0%	2.9%	3.4%
BASE	3,939	2,776	185	283	2,198	2,121
▲ MEAN	6.14	6.20	5.23	5.05	6.12	5.82

# BRAND/DESTINATION ADVOCACY – U.S. EAST

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



■ Very likely (7-8)	78.6%	88.3%	57.8%	63.9%	85.4%	87.4%
■ Somewhat likely (5-6)	15.4%	9.1%	28.9%	28.4%	10.9%	9.8%
■ Somewhat unlikely (3-4)	3.6%	1.5%	7.7%	2.8%	2.3%	1.2%
■ Very unlikely (1-2)	2.1%	0.9%	2.6%	2.4%	1.3%	1.6%
■ Not sure	0.3%	0.2%	3.0%	2.4%	0.1%	0.1%
BASE	3,920	2,765	185	282	2,182	2,114
▲ MEAN	7.20	7.52	6.60	6.83	7.44	7.49

# ACTIVITIES – SIGHTSEEING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	94.6%	96.4%	94.7%	93.2%	97.1%	96.8%
<b>On own (self-guided)</b>	74.5%	81.2%	61.0%	32.4%	85.4%	74.1%
<b>Helicopter/ airplane</b>	3.3%	7.5%	10.3%	2.5%	10.0%	23.7%
<b>Boat/ submarine/ whale</b>	17.8%	40.2%	13.9%	32.0%	25.1%	30.7%
<b>Visit towns</b>	42.5%	57.5%	36.3%	34.9%	55.8%	53.9%
<b>Limo/ van/ bus tour</b>	18.5%	13.8%	20.2%	22.6%	13.3%	13.4%
<b>Scenic views/ natural landmark</b>	59.4%	65.0%	46.4%	40.1%	69.1%	70.3%
<b>Movie/ TV/ film location</b>	9.7%	1.1%	0.5%	0.3%	1.1%	6.7%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	97.4%	96.5%	96.6%
<b>On own (self-guided)</b>	82.0%	81.8%	81.1%
<b>Helicopter/ airplane</b>	13.2%	12.1%	11.4%
<b>Boat/ submarine/ whale</b>	33.2%	31.1%	31.7%
<b>Visit towns</b>	37.4%	57.0%	54.7%
<b>Limo/ van/ bus tour</b>	19.9%	16.4%	16.9%
<b>Scenic views/ natural landmark</b>	77.7%	69.9%	67.2%
<b>Movie/ TV/ film location</b>	8.3%	7.0%	6.0%

# ACTIVITIES – RECREATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.1%	96.7%	82.1%	88.0%	95.8%	94.2%
<b>Beach/ sunbathing</b>	80.7%	84.8%	51.3%	60.7%	76.7%	71.9%
<b>Bodyboard/ Standup paddle board</b>	10.4%	8.8%	3.4%	2.5%	9.7%	6.9%
<b>Surfing</b>	6.6%	6.1%	1.1%	0.4%	3.8%	4.6%
<b>Canoeing/ kayak</b>	5.7%	3.9%	2.2%	0.7%	6.8%	10.8%
<b>Swim- ocean</b>	61.1%	67.1%	31.3%	43.3%	62.4%	51.6%
<b>Snorkel</b>	31.8%	47.1%	19.3%	42.3%	47.9%	32.7%
<b>Windsurf/ Kitesurf</b>	0.2%	0.4%	0.0%	0.0%	0.1%	0.1%
<b>Jet ski/ Parasail</b>	2.3%	1.7%	0.0%	1.0%	1.4%	0.2%
<b>Scuba</b>	2.3%	3.9%	2.8%	2.5%	3.7%	2.3%
<b>Fishing</b>	2.4%	3.0%	5.6%	2.5%	4.4%	2.1%
<b>Golf</b>	3.2%	7.3%	1.6%	7.7%	6.5%	6.5%

# STATEWIDE - ACTIVITIES – RECREATION – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	96.0%	96.2%	96.3%
<b>Beach/ sunbathing</b>	84.8%	83.8%	83.0%
<b>Bodyboard/ Standup paddle board</b>	13.8%	11.3%	10.4%
<b>Surfing</b>	7.8%	6.5%	6.3%
<b>Canoeing/ kayak</b>	9.1%	7.6%	7.4%
<b>Swim- ocean</b>	NA	65.1%	65.4%
<b>Snorkel</b>	NA	42.9%	43.4%
<b>Windsurf/ Kitesurf</b>	0.4%	0.3%	0.3%
<b>Jet ski/ Parasail</b>	3.0%	1.8%	1.8%
<b>Scuba</b>	4.0%	3.2%	3.4%
<b>Fishing</b>	2.9%	3.1%	3.5%
<b>Golf</b>	6.7%	6.7%	6.4%



# ACTIVITIES – RECREATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.1%	96.7%	82.1%	88.0%	95.8%	94.2%
<b>Run/ Jog/ Fitness walk</b>	21.1%	26.8%	8.4%	8.0%	20.8%	20.1%
<b>Spa</b>	7.6%	11.5%	2.9%	12.0%	7.3%	7.2%
<b>Hiking</b>	46.1%	45.8%	35.5%	28.1%	55.2%	47.4%
<b>Backpack/Camping</b>	1.3%	2.0%	1.7%	1.1%	2.7%	2.2%
<b>Agritourism</b>	13.7%	11.7%	9.1%	6.8%	19.8%	12.0%
<b>Sport event/ tournament</b>	3.0%	2.3%	0.5%	1.0%	3.2%	0.7%
<b>Park/ botanical garden</b>	36.6%	37.1%	25.4%	12.5%	47.1%	41.0%
<b>Waterpark</b>	2.0%	0.8%	0.5%	0.4%	0.9%	0.3%
<b>Mountain tube/ waterfall rappel</b>	0.4%	0.9%	0.0%	0.3%	0.7%	6.6%
<b>Zip-lining</b>	2.9%	6.1%	1.1%	0.8%	5.9%	5.4%
<b>Skydiving</b>	1.0%	0.1%	0.0%	0.0%	0.4%	0.3%
<b>All terrain vehicle (ATV)</b>	3.3%	1.4%	2.1%	5.0%	2.7%	4.5%
<b>Horseback riding</b>	2.0%	1.6%	0.0%	4.3%	2.4%	2.6%

# STATEWIDE - ACTIVITIES – RECREATION – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	96.0%	96.2%	96.3%
<b>Run/ Jog/ Fitness walk</b>	36.3%	28.5%	24.5%
<b>Spa</b>	11.6%	9.9%	10.0%
<b>Hiking</b>	33.8%	36.0%	51.3%
<b>Backpack/Camp</b>	*	*	2.3%
<b>Agritourism</b>	13.1%	17.1%	16.1%
<b>Sport event/ tournament</b>	2.3%	2.2%	2.9%
<b>Park/ botanical garden</b>	47.6%	45.3%	43.0%
<b>Waterpark</b>	NA	1.2%	1.3%
<b>Mountain tube/ waterfall rappel</b>	NA	1.7%	2.1%
<b>Zip-lining</b>	NA	5.9%	5.6%
<b>Skydiving</b>	NA	0.5%	0.6%
<b>All terrain vehicle (ATV)</b>	NA	3.8%	3.5%
<b>Horseback riding</b>	NA	2.3%	2.5%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.9%	97.9%	82.6%	81.0%	97.4%	93.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.2%	28.1%	10.3%	31.2%	18.7%	25.8%
<b>Live music/ stage show</b>	32.9%	33.2%	15.5%	6.9%	29.3%	27.9%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.8%	6.9%	3.9%	1.4%	7.7%	4.5%
<b>Fine dining</b>	49.4%	60.3%	14.4%	26.8%	45.9%	44.4%
<b>Family restaurant</b>	56.1%	54.8%	39.2%	18.8%	60.0%	49.6%
<b>Fast food</b>	41.8%	27.3%	21.0%	3.3%	32.5%	22.1%
<b>Food truck</b>	35.3%	27.4%	13.1%	2.1%	16.7%	29.5%
<b>Café/ coffee house</b>	38.6%	40.7%	24.7%	14.1%	46.3%	35.6%
<b>Ethnic dining</b>	35.6%	29.3%	12.0%	5.8%	31.6%	25.7%
<b>Prepared own meal</b>	30.7%	41.5%	35.4%	8.6%	46.8%	37.8%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	97.9%	97.7%	97.3%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	33.2%	26.1%	26.2%
<b>Live music/ stage show</b>	39.6%	37.3%	35.9%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.6%	10.0%	9.1%
<b>Fine dining</b>	58.2%	55.7%	53.8%
<b>Family restaurant</b>	65.8%	58.3%	58.4%
<b>Fast food</b>	34.9%	35.7%	35.2%
<b>Food truck</b>	NA	31.2%	31.4%
<b>Café/ coffee house</b>	44.8%	43.9%	43.1%
<b>Ethnic dining</b>	36.1%	34.0%	34.3%
<b>Prepared own meal</b>	40.6%	43.6%	42.2%

## ACTIVITIES – SHOPPING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	94.3%	95.8%	78.8%	62.4%	95.1%	90.6%
<b>Mall/ department store</b>	49.1%	37.3%	5.3%	1.7%	29.5%	18.6%
<b>Designer boutique</b>	16.5%	18.8%	3.2%	4.0%	14.4%	14.7%
<b>Hotel/ resort store</b>	40.3%	37.8%	7.4%	16.7%	32.4%	23.6%
<b>Swap meet/ flea market</b>	18.0%	11.3%	8.4%	1.4%	12.0%	6.4%
<b>Discount/ outlet store</b>	16.9%	16.2%	2.1%	1.4%	12.2%	10.5%
<b>Supermarket</b>	43.6%	62.1%	33.9%	12.0%	63.0%	52.4%
<b>Farmer's market</b>	17.9%	24.8%	23.3%	4.7%	42.5%	30.2%
<b>Convenience store</b>	51.3%	45.2%	18.1%	15.1%	41.4%	35.7%
<b>Duty free store</b>	6.3%	3.0%	1.6%	2.1%	2.2%	2.1%
<b>Local shop/ artisan</b>	54.3%	71.1%	54.8%	34.6%	66.3%	69.2%

# STATEWIDE - ACTIVITIES – SHOPPING – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	95.9%	95.9%	95.4%
<b>Mall/ department store</b>	44.3%	43.1%	40.4%
<b>Designer boutique</b>	23.1%	18.6%	18.1%
<b>Hotel/ resort store</b>	39.5%	39.2%	37.9%
<b>Swap meet/ flea market</b>	18.2%	15.6%	14.8%
<b>Discount/ outlet store</b>	19.1%	17.8%	16.2%
<b>Supermarket</b>	51.4%	59.2%	58.6%
<b>Farmer's market</b>	28.2%	31.2%	30.3%
<b>Convenience store</b>	44.6%	48.1%	48.0%
<b>Duty free store</b>	4.1%	4.6%	4.4%
<b>Local shop/ artisan</b>	67.6%	67.0%	66.9%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	79.8%	67.8%	69.2%	42.5%	70.8%	63.2%
<b>Historic military site</b>	53.9%	5.1%	8.0%	4.9%	12.1%	6.0%
<b>Other historical site</b>	25.9%	22.5%	46.2%	20.2%	40.5%	26.9%
<b>Museum/ art gallery</b>	15.5%	16.4%	11.0%	12.8%	16.1%	11.1%
<b>Luau/ Polynesian show/ hula show</b>	39.4%	39.4%	12.6%	7.7%	29.9%	30.8%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	9.3%	6.1%	3.2%	1.8%	6.1%	4.6%
<b>Play/ concert/ theatre</b>	5.1%	2.6%	1.1%	1.4%	3.2%	2.6%
<b>Art/ craft fair</b>	6.9%	12.3%	7.2%	2.5%	13.4%	11.7%
<b>Festival event</b>	4.2%	3.5%	7.7%	3.0%	6.5%	3.1%

## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	81.3%	77.1%	75.6%
<b>Historic military site</b>	42.9%	28.3%	27.2%
<b>Other historical site</b>	34.7%	31.4%	31.1%
<b>Museum/ art gallery</b>	21.9%	18.3%	17.2%
<b>Luau/ Polynesian show/ hula show</b>	47.6%	42.0%	41.3%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	6.3%	8.5%	8.1%
<b>Play/ concert/ theatre</b>	4.7%	5.1%	4.3%
<b>Art/ craft fair</b>	12.8%	13.5%	11.9%
<b>Festival event</b>	9.8%	5.3%	5.2%



## ACTIVITIES – TRANSPORTATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	91.2%	96.5%	79.5%	68.6%	93.9%	94.5%
<b>Airport shuttle</b>	21.0%	12.0%	6.5%	17.5%	14.4%	11.3%
<b>Trolley</b>	4.4%	2.5%	1.7%	0.7%	2.0%	3.3%
<b>Public bus</b>	8.3%	2.3%	3.3%	1.5%	1.5%	1.8%
<b>Tour bus/ tour van</b>	19.0%	14.7%	22.9%	33.4%	14.2%	19.7%
<b>Taxi/ limo</b>	13.6%	6.5%	5.4%	11.3%	6.3%	4.3%
<b>Rental car</b>	59.3%	83.7%	46.9%	16.0%	81.5%	72.2%
<b>Ride share</b>	27.3%	12.5%	3.6%	2.1%	10.1%	7.4%
<b>Bicycle rental</b>	2.0%	1.8%	0.5%	0.0%	1.4%	2.5%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – U.S. EAST

	2017	2018	2019
<b>TOTAL</b>	95.0%	92.4%	93.2%
<b>Airport shuttle</b>	26.3%	20.2%	17.6%
<b>Trolley</b>	4.5%	3.4%	3.7%
<b>Public bus</b>	7.5%	5.7%	4.8%
<b>Tour bus/ tour van</b>	20.6%	18.0%	18.6%
<b>Taxi/ limo</b>	20.1%	12.4%	10.0%
<b>Rental car</b>	75.3%	74.2%	74.4%
<b>Ride share</b>	NA	14.9%	18.3%
<b>Bicycle rental</b>	NA	2.2%	2.3%

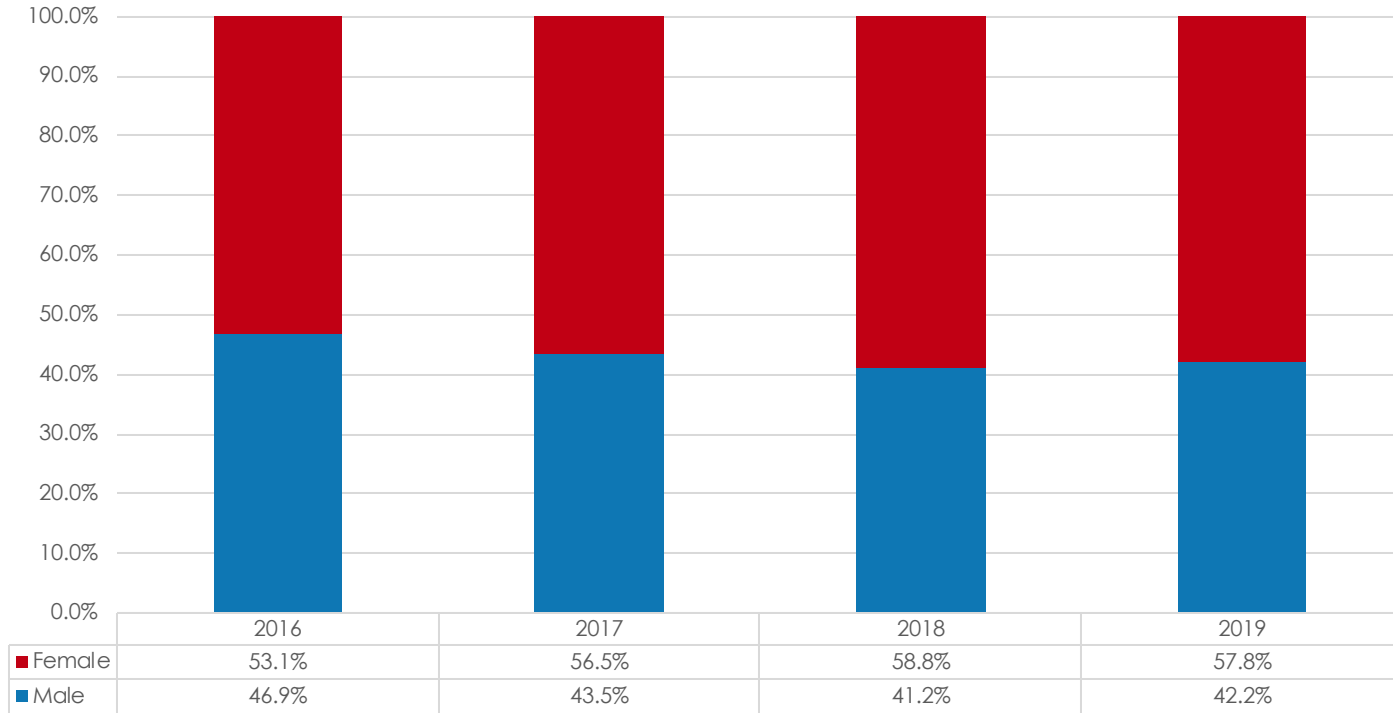
## ACTIVITIES – OTHER – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	32.7%	15.5%	18.7%	5.7%	21.0%	12.6%
<b>Visit friends/ family</b>	32.0%	15.1%	17.6%	4.6%	20.2%	11.8%
<b>Volunteer- non-profit</b>	0.9%	0.5%	1.1%	1.1%	1.3%	0.9%

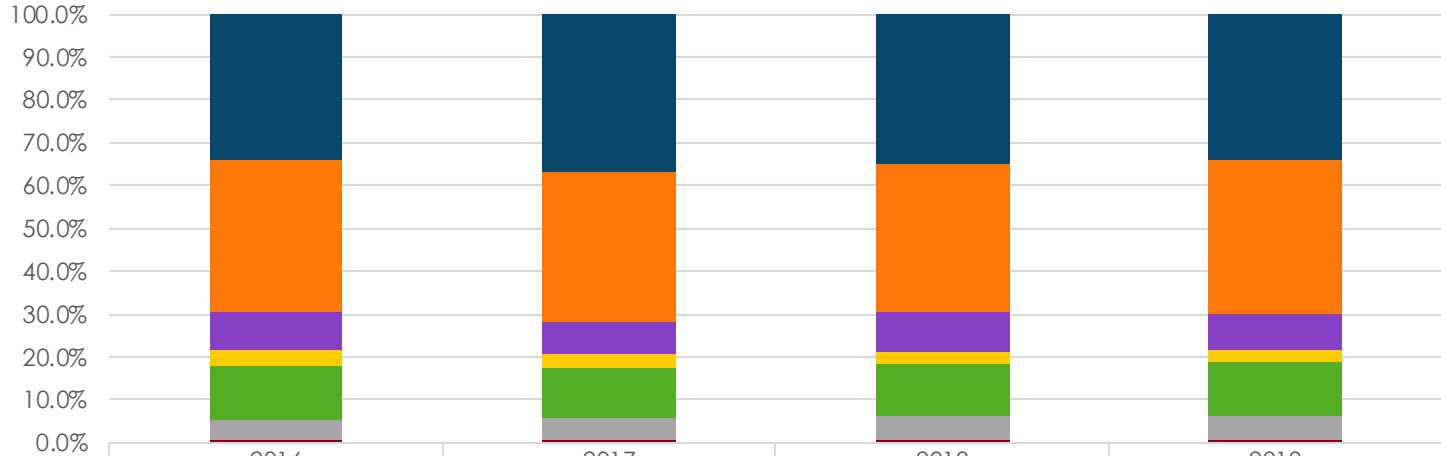
## ACTIVITIES – OTHER – U.S. EAST

	2018	2019
<b>TOTAL</b>	26.4%	25.2%
<b>Visit friends/ family</b>	25.6%	24.4%
<b>Volunteer- non-profit</b>	1.3%	1.1%

# VISITOR PROFILE – GENDER – U.S. EAST

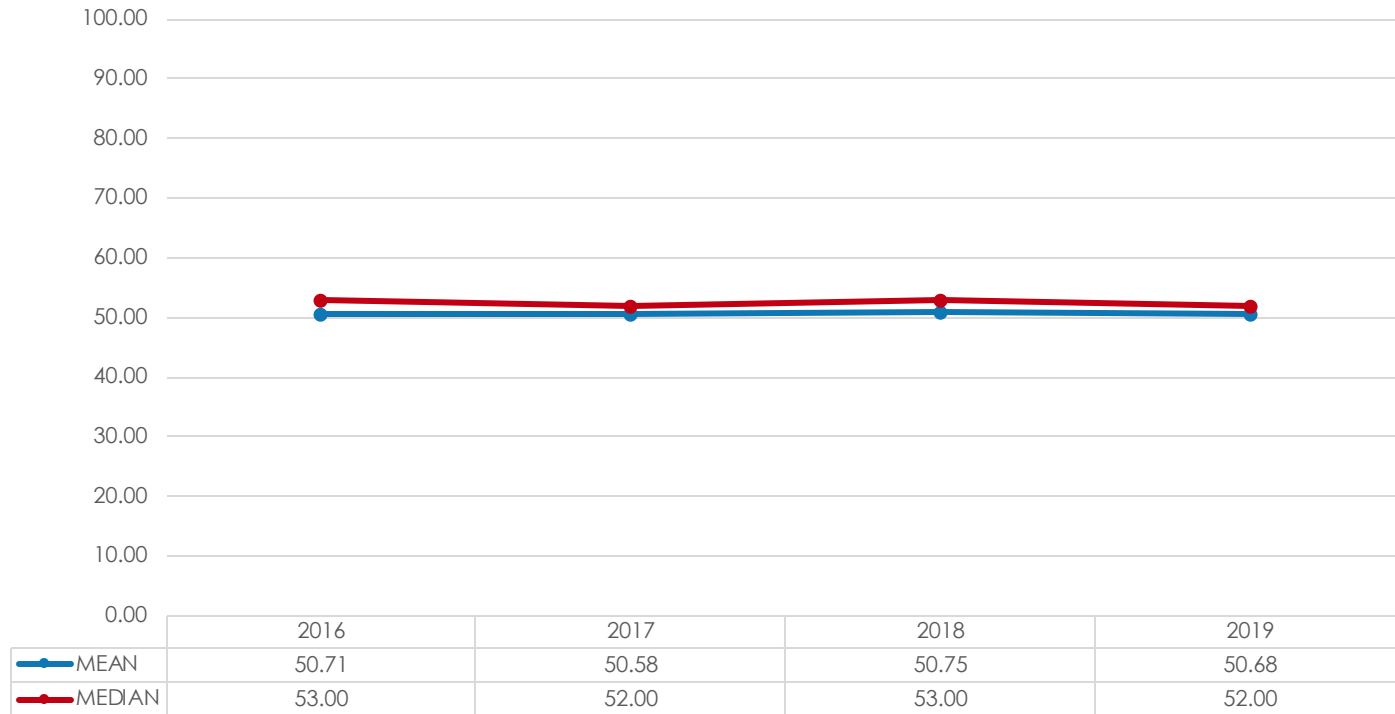


# VISITOR PROFILE – EDUCATION – U.S. EAST

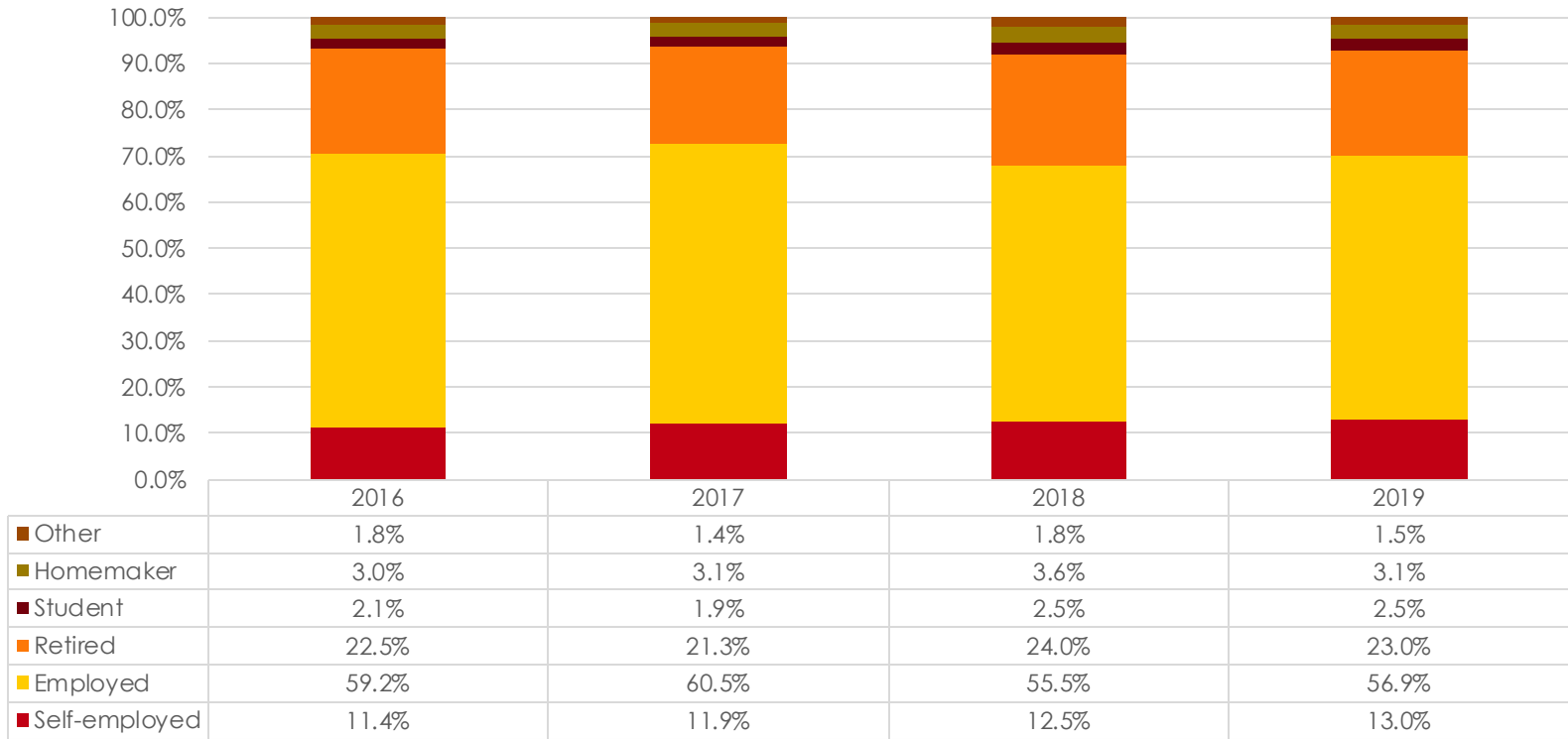


	2016	2017	2018	2019
■ Post-Graduate	34.2%	37.1%	34.8%	33.8%
■ College Grad	35.3%	34.8%	34.9%	36.4%
■ Associate Degree	8.8%	7.6%	9.2%	8.3%
■ Vocational/ Tech	3.6%	3.2%	2.8%	2.7%
■ Some College	12.7%	11.6%	12.2%	12.4%
■ H.S. Grad	4.8%	5.3%	5.6%	5.9%
■ Some / No H.S.	0.6%	0.5%	0.5%	0.5%

# VISITOR PROFILE – AGE – U.S. EAST

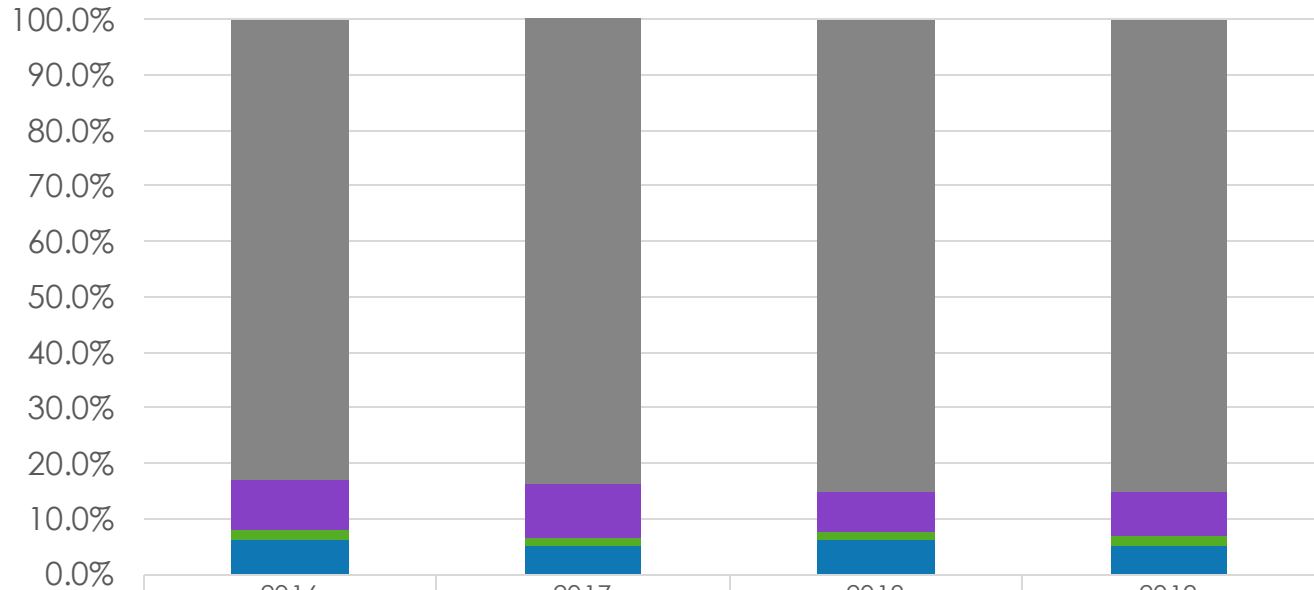


# VISITOR PROFILE – EMPLOYMENT STATUS – U.S. EAST





# VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. EAST

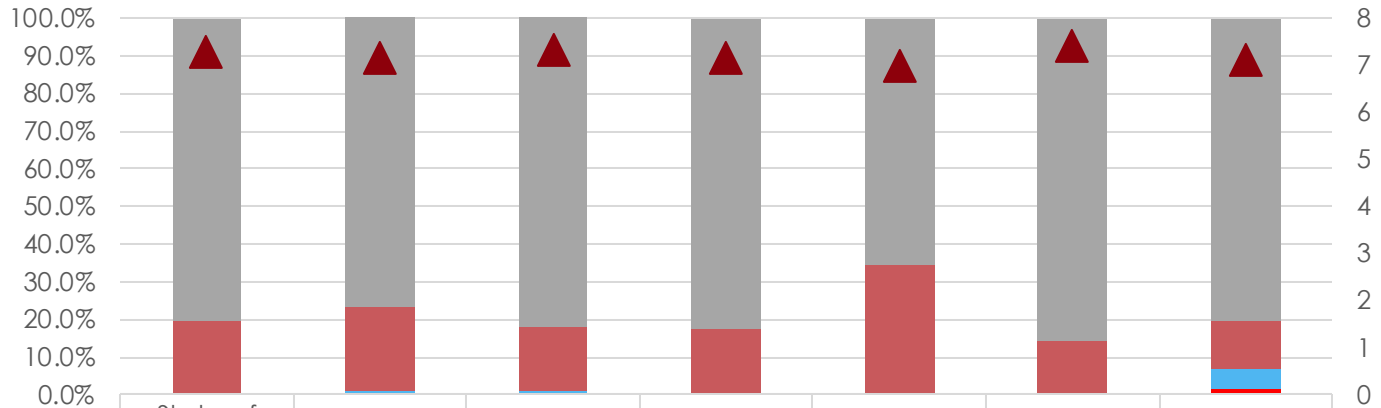


	2016	2017	2018	2019
■ Do not nor plan to purchase	83.0%	83.8%	85.1%	85.3%
■ Plan to in future	9.0%	9.9%	7.3%	8.0%
■ Other Property Type	1.7%	1.3%	1.6%	1.5%
■ Timeshare	6.3%	5.1%	6.0%	5.2%

# SECTION – JAPAN

# OVERALL SATISFACTION – MOST RECENT VISIT – JAPAN

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	80.4%	76.6%	82.1%	82.8%	65.8%	85.8%	80.3%
■ Above Average (5-6)	18.8%	22.5%	17.2%	17.2%	34.2%	13.5%	13.0%
■ Below Average (3-4)	0.7%	0.9%	0.8%	0.0%	0.0%	0.7%	5.0%
■ Poor (1-2)	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	1.7%
BASE	6,652	4,655	128	6	3	2,446	61
▲ MEAN	7.29	7.17	7.34	7.16	6.99	7.43	7.11

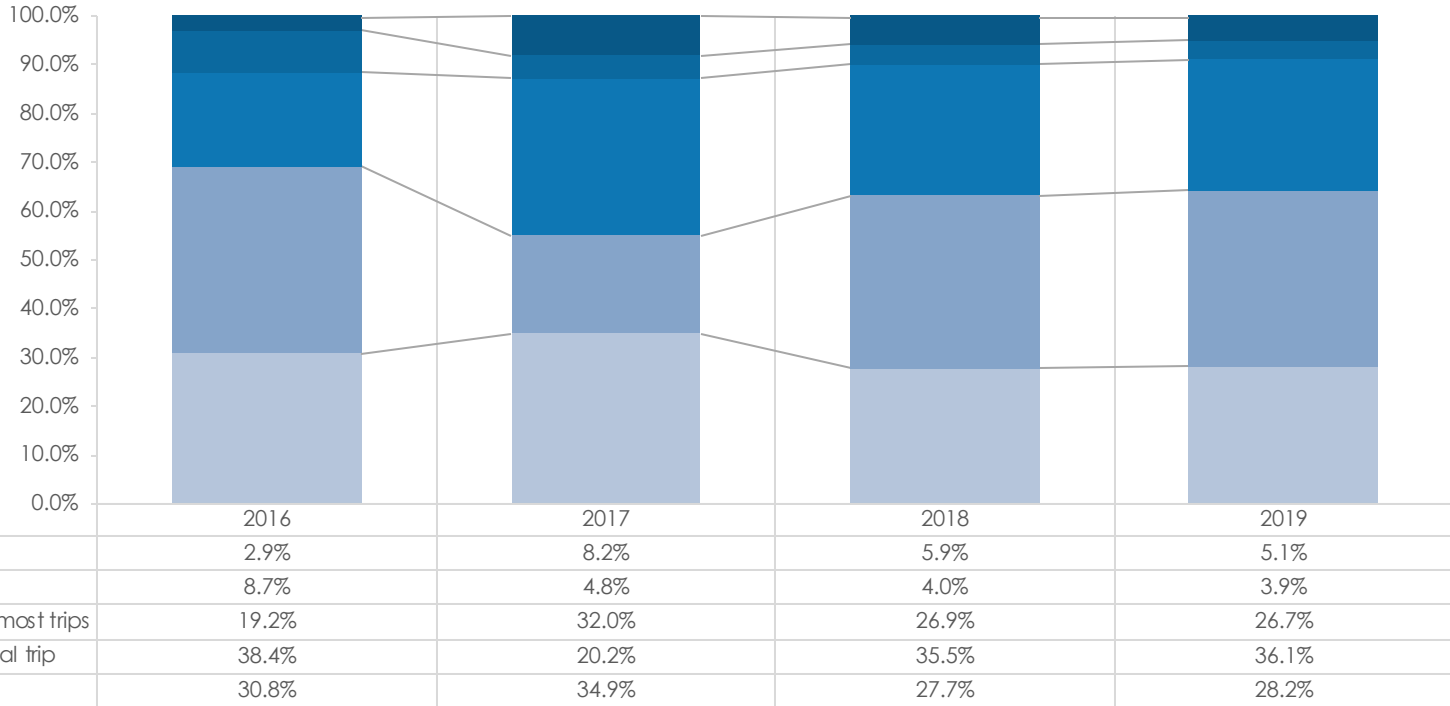
# PRIMARY TRIP PURPOSE JAPAN

	2018	2019
Vacation	65.4%	68.1%
Honeymoon	10.2%	10.1%
Attend wedding/ vow renewal	4.5%	3.7%
Get married	2.6%	2.4%
Business trip	2.4%	2.3%
Vacation home/ timeshare	1.9%	2.3%
Anniversary/ birthday	3.6%	2.1%

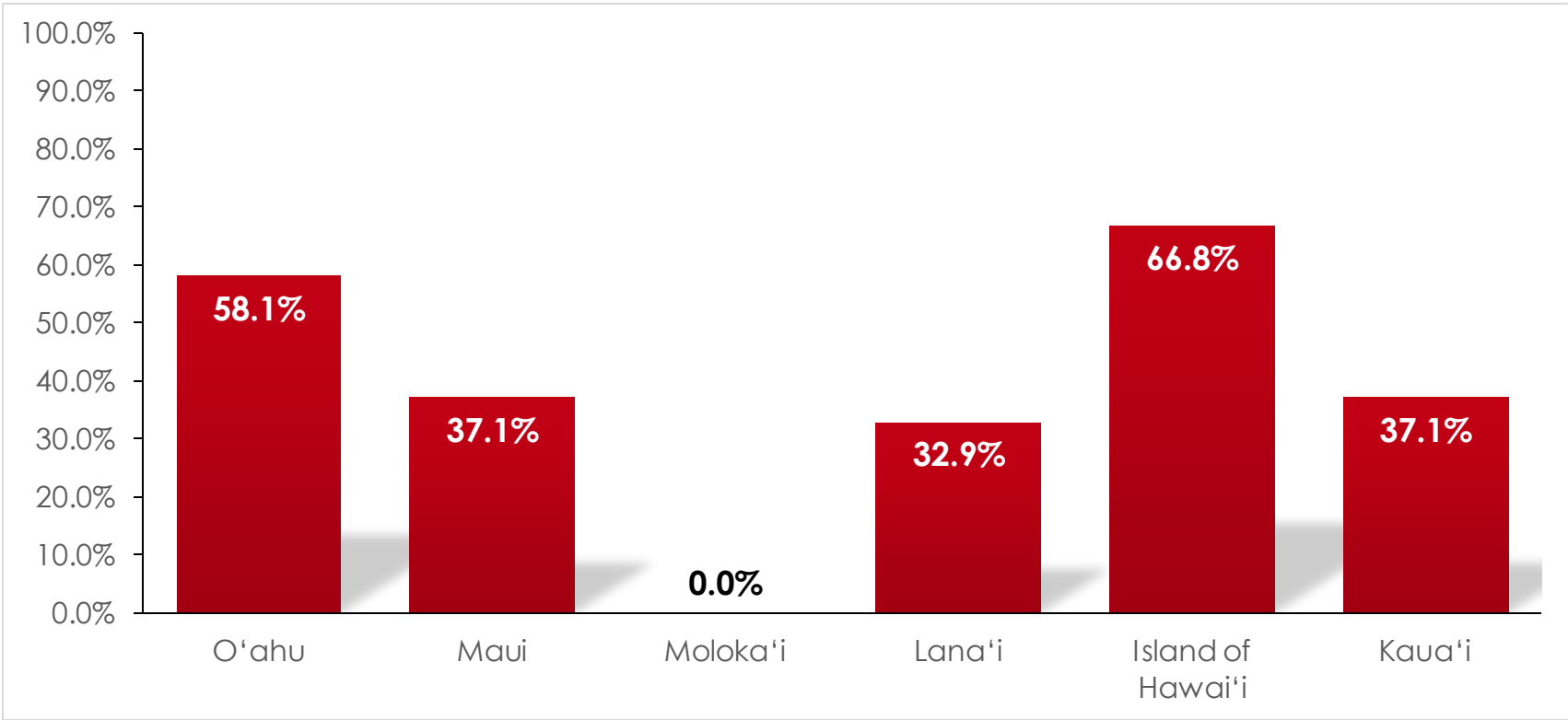
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE JAPAN

	2018	2019
Vacation	86.0%	87.7%
Shopping/ fashion	26.3%	24.3%
Honeymoon	12.9%	12.5%
Anniversary/ birthday	7.2%	6.1%
Vacation home/ timeshare	4.8%	5.3%
Attend wedding/ vow renewal	5.2%	4.1%
Family gathering/ reunion	4.4%	4.0%
Visit friends/ relatives	4.7%	3.6%
Get married	3.5%	3.3%
Business trip	3.3%	3.2%

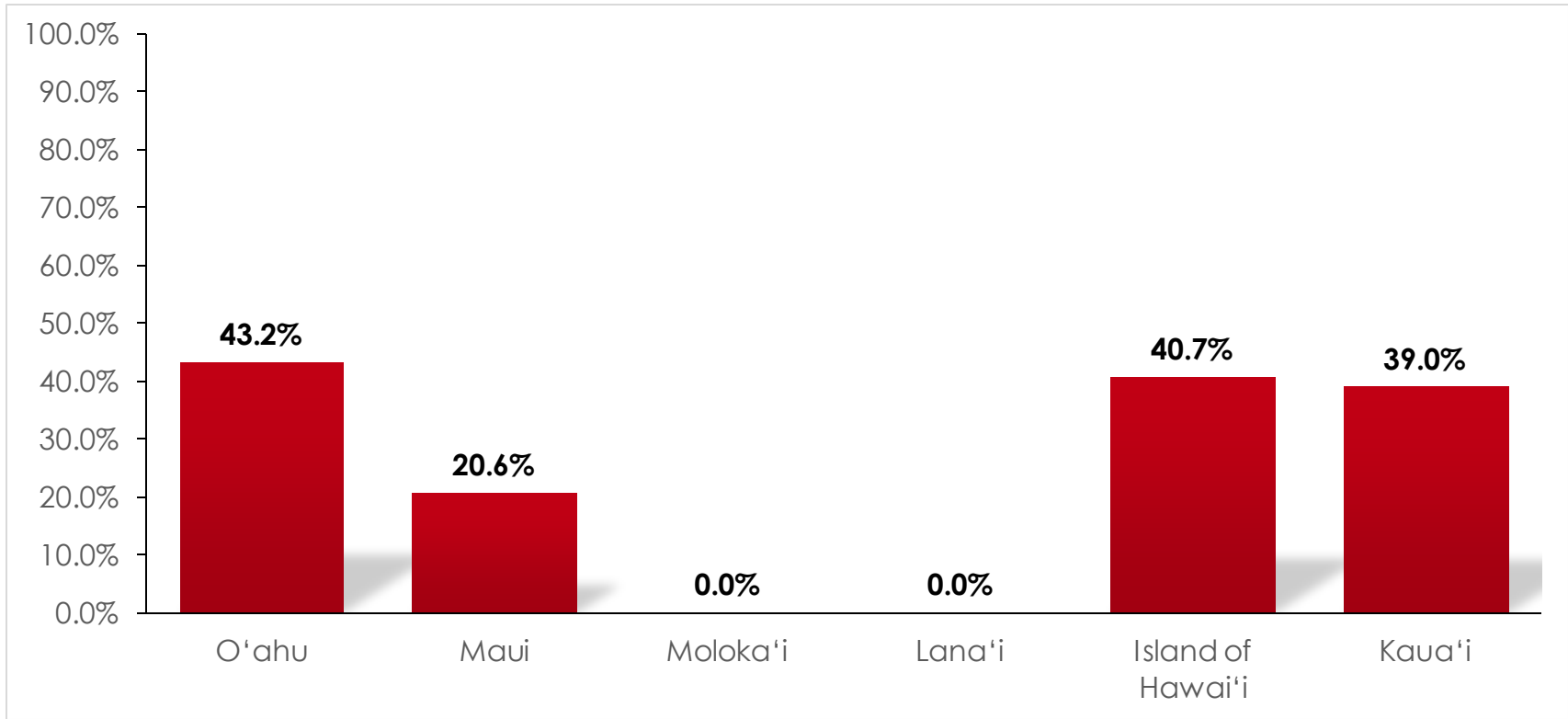
# VACATION TRIP DESCRIPTION – JAPAN



# ADVERTISING AWARENESS – JAPAN

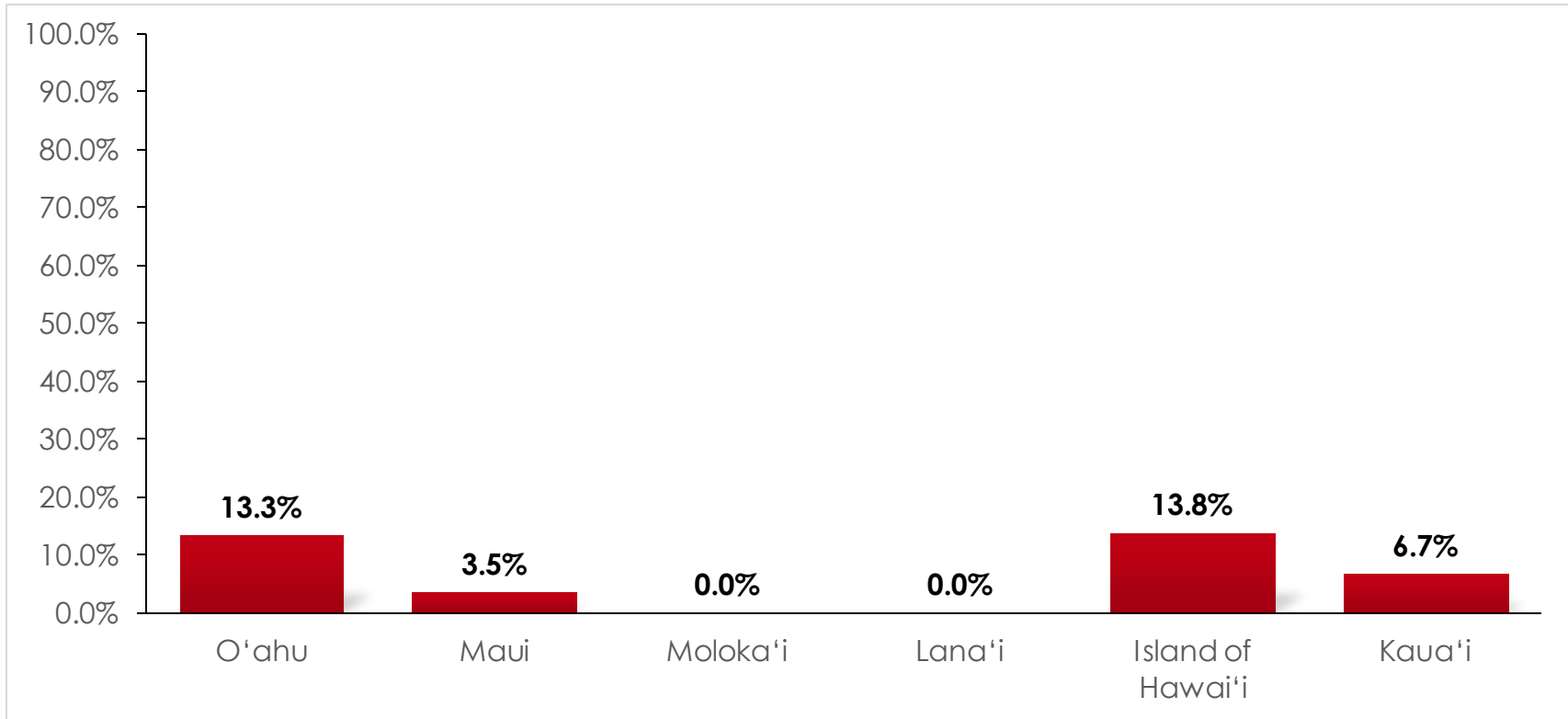


# IMPACT OF LOCATION FILMING – JAPAN

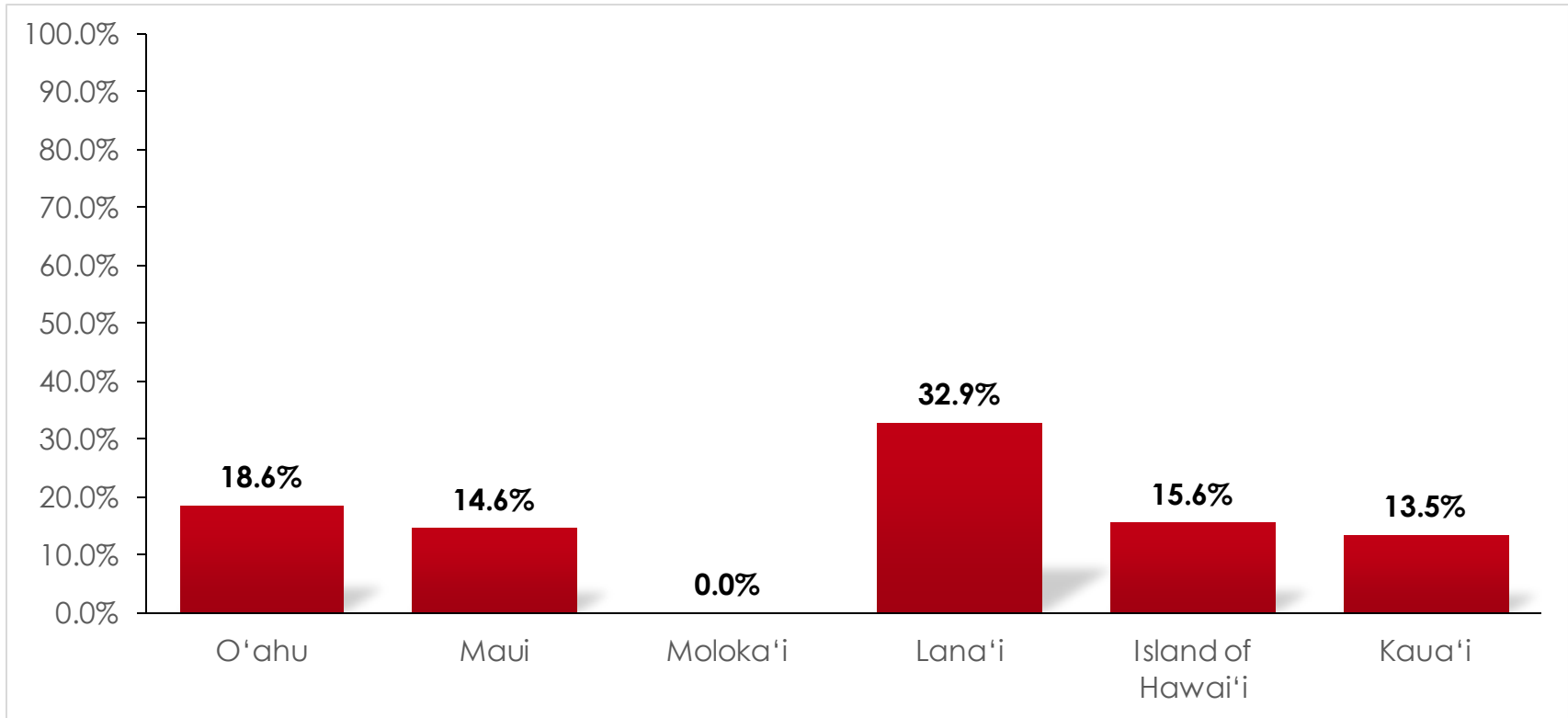




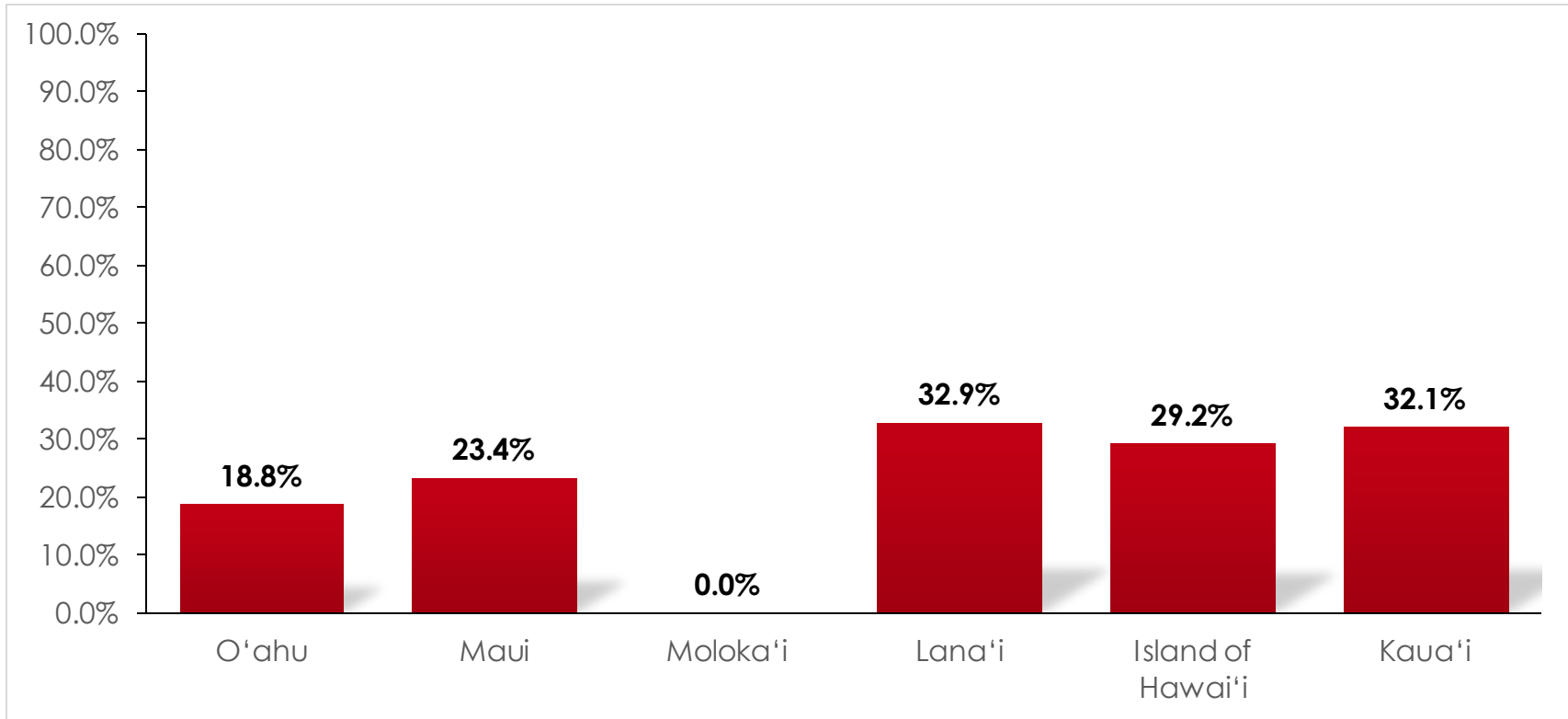
# IMPACT OF HAWAIIAN MUSIC – JAPAN



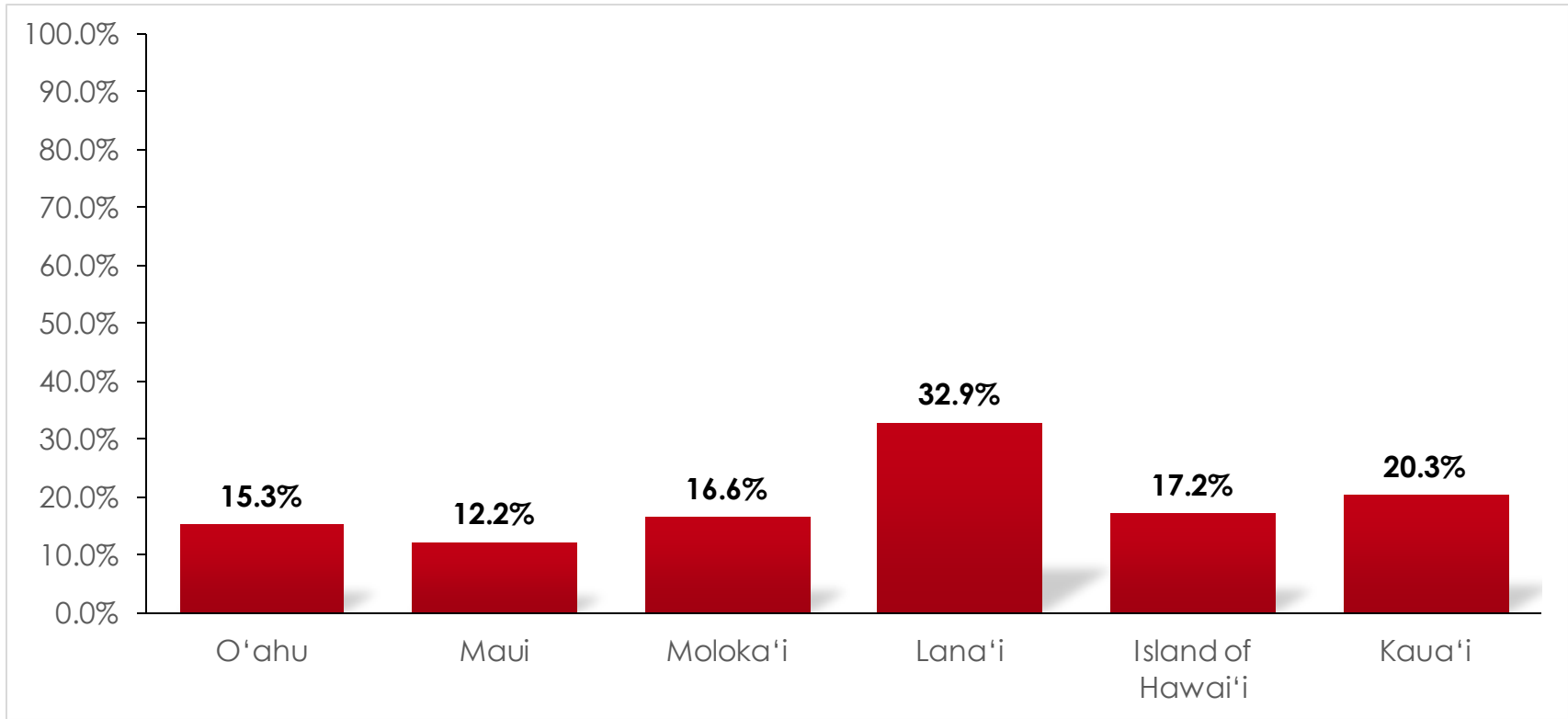
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – JAPAN



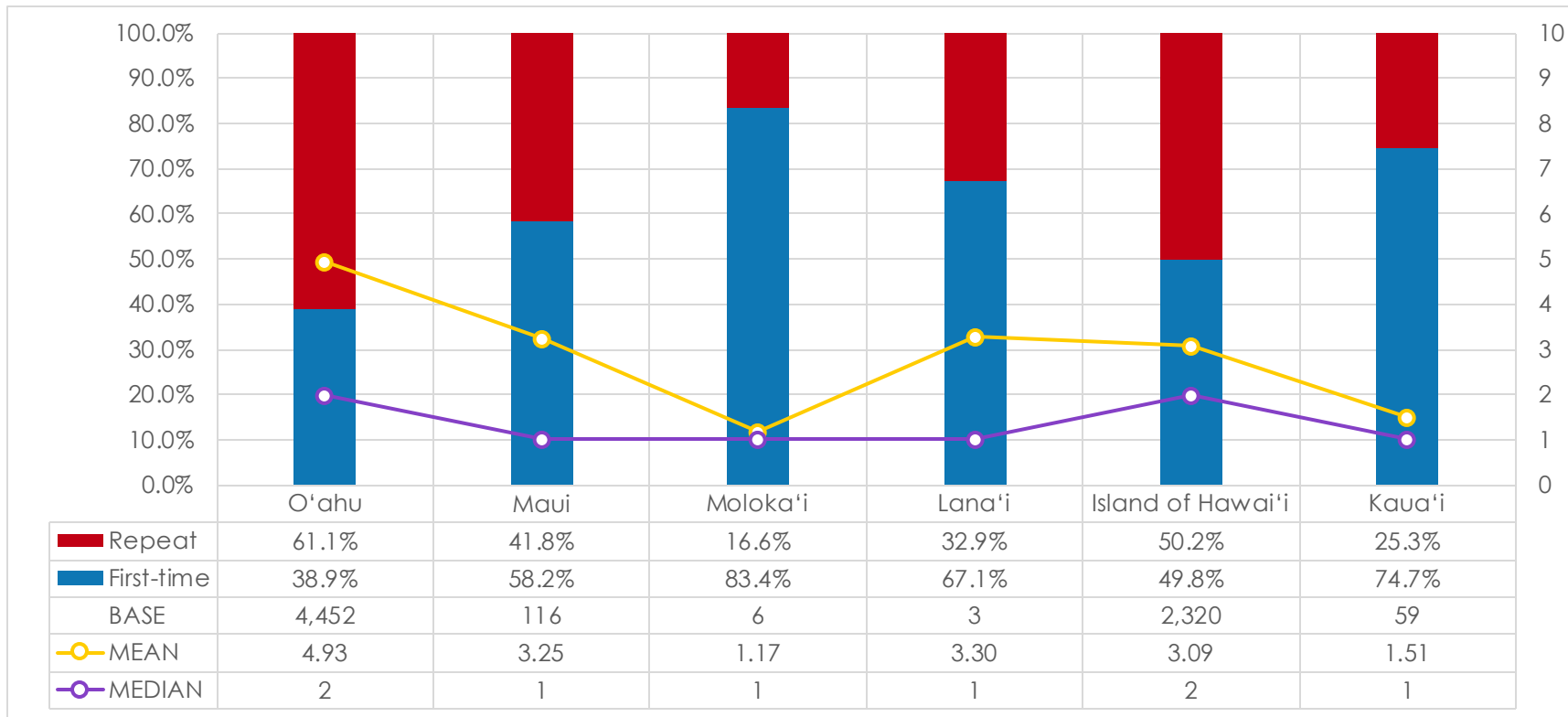
# IMPACT OF OUTDOOR/ SPORTING EVENTS – JAPAN



# IMPACT OF HAWAIIAN CULTURAL EVENTS – JAPAN



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – JAPAN

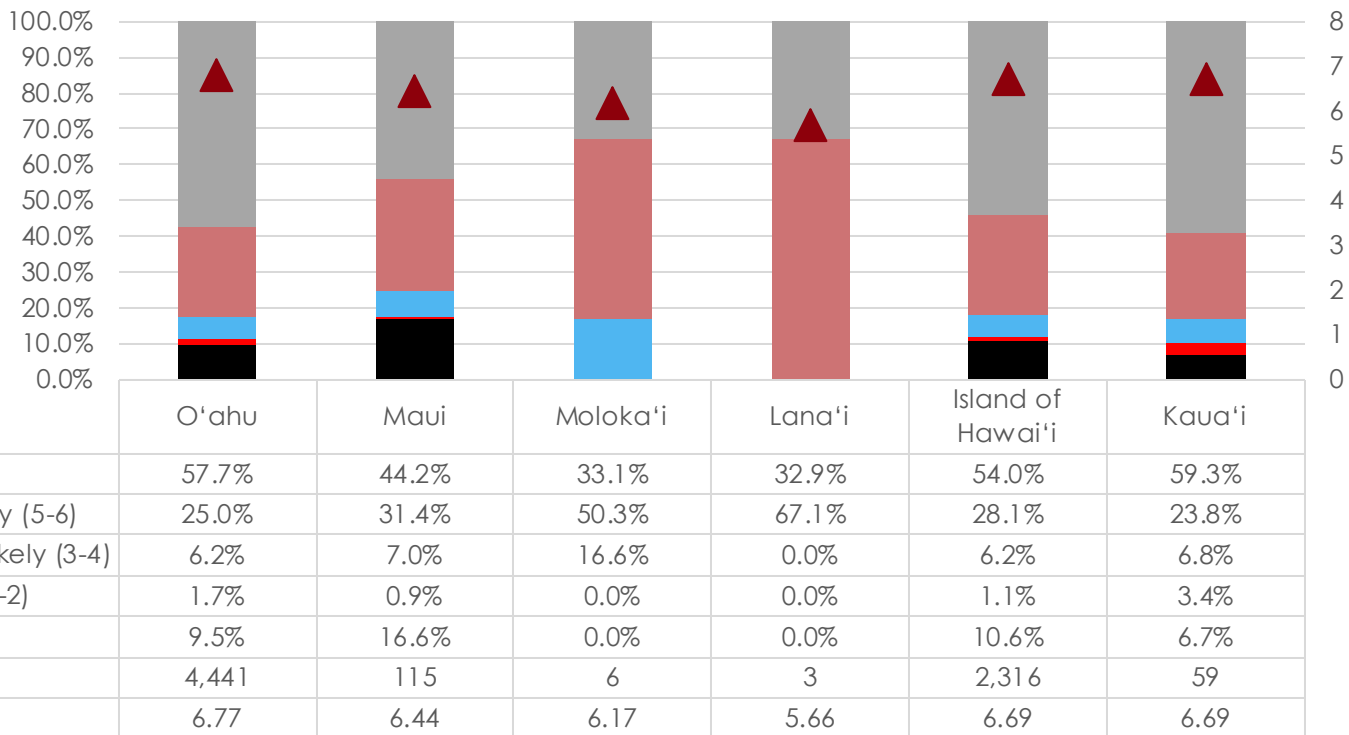


# TRAVEL PARTY MEMBERS – JAPAN

	2016	2017	2018	2019
Spouse	65.0%	51.9%	50.6%	56.6%
Other adult family	31.5%	26.2%	23.8%	23.6%
Child under 18	17.7%	15.0%	15.9%	17.0%
Friends/ associates	17.4%	21.7%	21.9%	21.2%
Alone	4.9%	7.5%	7.1%	5.7%
Girlfriend/ boyfriend	2.5%	3.8%	6.9%	4.2%
Same-sex partner	.2%	.4%	0.3%	0.2%

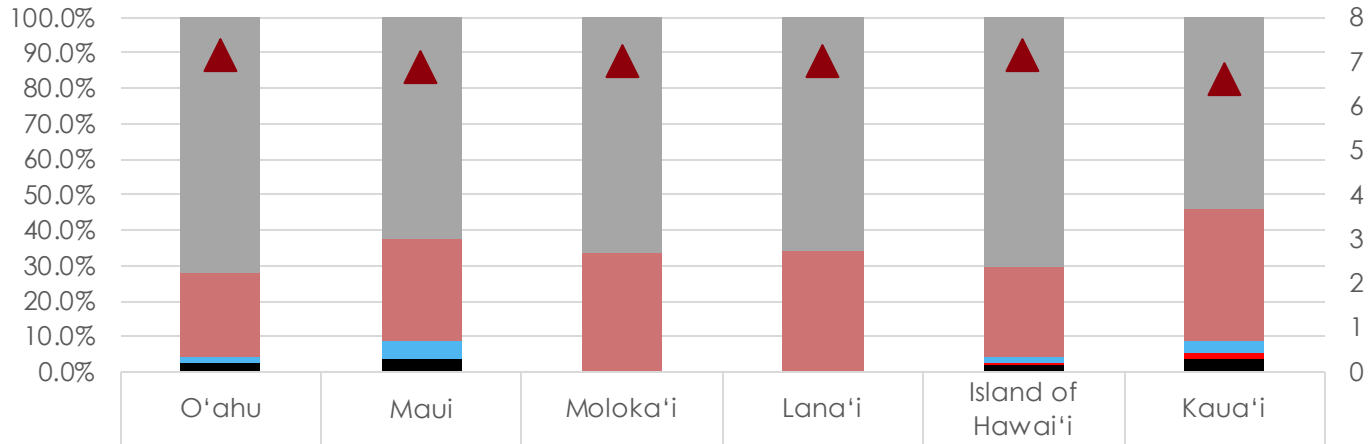
# LIKELIHOOD OF RETURN VISIT – JAPAN

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



# BRAND/DESTINATION ADVOCACY – JAPAN

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



■ Very likely (7-8)	72.0%	62.5%	66.2%	65.8%	70.5%	54.4%
■ Somewhat likely (5-6)	23.5%	28.8%	33.8%	34.2%	24.9%	37.1%
■ Somewhat unlikely (3-4)	1.6%	5.2%	0.0%	0.0%	2.2%	3.4%
■ Very unlikely (1-2)	0.5%	0.0%	0.0%	0.0%	0.3%	1.8%
■ Not sure	2.3%	3.5%	0.0%	0.0%	2.0%	3.4%
BASE	4,437	115	6	3	2,311	59
▲ MEAN	7.15	6.88	6.99	6.99	7.11	6.61



## ACTIVITIES – SIGHTSEEING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	94.7%	92.2%	100.0%	100.0%	96.8%	100.0%
<b>On own (self-guided)</b>	63.8%	63.3%	49.7%	0.0%	66.1%	44.1%
<b>Helicopter/ airplane</b>	1.6%	1.8%	0.0%	0.0%	3.2%	5.1%
<b>Boat/ submarine/ whale</b>	11.7%	13.0%	16.6%	0.0%	6.9%	13.5%
<b>Visit towns</b>	32.6%	27.8%	83.4%	100.0%	31.0%	27.1%
<b>Limo/ van/ bus tour</b>	18.6%	8.7%	16.6%	0.0%	31.1%	28.7%
<b>Scenic views/ natural landmark</b>	16.2%	28.7%	49.7%	32.9%	27.3%	37.2%
<b>Movie/ TV/ film location</b>	5.0%	2.6%	0.0%	0.0%	1.3%	3.4%

## STATEWIDE - ACTIVITIES – SIGHTSEEING - JAPAN

	2017	2018	2019
<b>TOTAL</b>	86.1%	95.5%	95.5%
<b>On own (self-guided)</b>	43.2%	68.8%	65.1%
<b>Helicopter/ airplane</b>	1.3%	2.3%	2.2%
<b>Boat/ submarine/ whale</b>	12.2%	9.7%	10.6%
<b>Visit towns</b>	29.0%	31.2%	32.7%
<b>Limo/ van/ bus tour</b>	27.9%	19.5%	23.1%
<b>Scenic views/ natural landmark</b>	25.4%	23.3%	20.8%
<b>Movie/ TV/ film location</b>	6.3%	4.1%	3.9%

# ACTIVITIES – RECREATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	95.2%	90.5%	83.4%	100.0%	96.2%	93.3%
<b>Beach/ sunbathing</b>	74.0%	60.1%	33.1%	32.9%	64.0%	45.9%
<b>Bodyboard/ Standup paddle board</b>	3.1%	5.2%	0.0%	0.0%	4.1%	0.0%
<b>Surfing</b>	3.2%	0.0%	0.0%	0.0%	0.9%	1.7%
<b>Canoeing/ kayak</b>	2.1%	0.9%	0.0%	0.0%	3.7%	1.7%
<b>Swim- ocean</b>	34.7%	30.5%	0.0%	100.0%	30.5%	18.6%
<b>Snorkel</b>	16.1%	22.6%	0.0%	0.0%	23.7%	8.4%
<b>Windsurf/ Kitesurf</b>	0.2%	1.7%	0.0%	0.0%	0.1%	0.0%
<b>Jet ski/ Parasail</b>	3.4%	0.9%	0.0%	0.0%	0.5%	0.0%
<b>Scuba</b>	2.0%	1.8%	0.0%	0.0%	1.0%	3.4%
<b>Fishing</b>	0.6%	0.0%	0.0%	0.0%	1.1%	0.0%
<b>Golf</b>	3.4%	3.4%	0.0%	0.0%	14.6%	6.7%

# STATEWIDE - ACTIVITIES – RECREATION – JAPAN

	2017	2018	2019
<b>TOTAL</b>	88.5%	96.2%	96.0%
<b>Beach/ sunbathing</b>	68.3%	73.1%	71.6%
<b>Bodyboard/ Standup paddle board</b>	5.0%	3.7%	3.5%
<b>Surfing</b>	3.7%	3.6%	2.5%
<b>Canoeing/ kayak</b>	2.8%	2.1%	2.7%
<b>Swim- ocean</b>	NA	38.4%	34.2%
<b>Snorkel</b>	NA	17.2%	19.3%
<b>Windsurf/ Kitesurf</b>	0.5%	0.2%	0.2%
<b>Jet ski/ Parasail</b>	3.7%	2.9%	2.4%
<b>Scuba</b>	3.0%	2.2%	1.7%
<b>Fishing</b>	1.2%	1.5%	0.8%
<b>Golf</b>	5.4%	7.5%	7.3%

# ACTIVITIES – RECREATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	95.2%	90.5%	83.4%	100.0%	96.2%	93.3%
<b>Run/ Jog/ Fitness walk</b>	11.7%	12.1%	0.0%	0.0%	12.2%	8.4%
<b>Spa</b>	6.8%	3.4%	0.0%	32.9%	6.6%	5.1%
<b>Hiking</b>	20.1%	11.3%	0.0%	32.9%	13.5%	13.5%
<b>Backpack/Camp</b>	0.2%	0.0%	0.0%	0.0%	0.1%	1.7%
<b>Agritourism</b>	9.6%	13.9%	49.7%	34.2%	21.7%	15.2%
<b>Sport event/ tournament</b>	1.8%	0.9%	0.0%	0.0%	1.6%	3.4%
<b>Park/ botanical garden</b>	20.1%	13.9%	66.9%	34.2%	22.1%	25.4%
<b>Waterpark</b>	2.4%	1.7%	0.0%	0.0%	2.8%	3.4%
<b>Mountain tube/ waterfall rappel</b>	0.1%	1.8%	0.0%	0.0%	1.1%	0.0%
<b>Zip-lining</b>	0.9%	3.5%	0.0%	0.0%	1.2%	0.0%
<b>Skydiving</b>	1.0%	0.0%	0.0%	0.0%	0.1%	0.0%
<b>All terrain vehicle (ATV)</b>	1.3%	0.9%	0.0%	0.0%	0.3%	1.7%
<b>Horseback riding</b>	3.5%	4.4%	0.0%	0.0%	5.5%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – JAPAN

	2017	2018	2019
<b>TOTAL</b>	88.5%	96.2%	96.0%
<b>Run/ Jog/ Fitness walk</b>	14.9%	14.7%	12.0%
<b>Spa</b>	6.9%	6.5%	6.9%
<b>Hiking</b>	7.1%	7.4%	18.2%
<b>Backpack/Camp</b>	*	*	0.2%
<b>Agritourism</b>	2.7%	12.2%	14.2%
<b>Sport event/ tournament</b>	1.9%	1.8%	1.8%
<b>Park/ botanical garden</b>	20.1%	24.0%	21.3%
<b>Waterpark</b>	NA	3.5%	2.6%
<b>Mountain tube/ waterfall rappel</b>	NA	0.7%	0.5%
<b>Zip-lining</b>	NA	0.7%	1.1%
<b>Skydiving</b>	NA	0.8%	0.7%
<b>All terrain vehicle (ATV)</b>	NA	1.1%	1.0%
<b>Horseback riding</b>	NA	5.0%	4.3%

\* Combined with hiking

## ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.5%	89.6%	100.0%	100.0%	96.9%	96.6%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	16.4%	10.4%	0.0%	32.9%	6.1%	20.4%
<b>Live music/ stage show</b>	16.7%	13.9%	0.0%	0.0%	18.7%	13.6%
<b>Nightclub/ dancing/ bar/ karaoke</b>	5.7%	2.7%	0.0%	0.0%	2.6%	3.4%
<b>Fine dining</b>	45.6%	32.2%	33.1%	100.0%	34.8%	32.1%
<b>Family restaurant</b>	22.5%	18.3%	0.0%	0.0%	26.1%	10.2%
<b>Fast food</b>	54.9%	33.0%	49.7%	0.0%	46.6%	27.2%
<b>Food truck</b>	16.8%	7.0%	16.6%	0.0%	5.9%	6.8%
<b>Café/ coffee house</b>	48.9%	41.7%	49.7%	65.8%	51.5%	42.3%
<b>Ethnic dining</b>	8.8%	5.2%	17.2%	0.0%	7.8%	6.7%
<b>Prepared own meal</b>	13.1%	22.6%	16.6%	0.0%	30.7%	16.9%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

	2017	2018	2019
<b>TOTAL</b>	92.6%	98.3%	97.5%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	46.6%	15.7%	13.4%
<b>Live music/ stage show</b>	17.4%	20.3%	17.9%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.1%	6.6%	4.8%
<b>Fine dining</b>	36.2%	45.4%	42.6%
<b>Family restaurant</b>	26.3%	23.4%	24.0%
<b>Fast food</b>	46.4%	53.0%	52.6%
<b>Food truck</b>	NA	14.6%	13.4%
<b>Café/ coffee house</b>	48.4%	53.8%	50.2%
<b>Ethnic dining</b>	7.0%	10.3%	8.6%
<b>Prepared own meal</b>	16.7%	18.7%	19.5%



## ACTIVITIES – SHOPPING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	98.1%	90.4%	100.0%	67.1%	97.7%	91.4%
<b>Mall/ department store</b>	86.0%	63.6%	0.0%	0.0%	59.5%	37.2%
<b>Designer boutique</b>	27.4%	13.8%	0.0%	0.0%	4.6%	1.7%
<b>Hotel/ resort store</b>	34.8%	31.3%	0.0%	0.0%	32.8%	10.1%
<b>Swap meet/ flea market</b>	3.7%	4.3%	0.0%	0.0%	3.1%	1.8%
<b>Discount/ outlet store</b>	26.7%	18.2%	0.0%	0.0%	8.0%	1.7%
<b>Supermarket</b>	63.3%	54.8%	49.7%	32.9%	77.9%	49.2%
<b>Farmer's market</b>	15.3%	10.5%	0.0%	0.0%	25.3%	10.2%
<b>Convenience store</b>	51.1%	31.2%	0.0%	0.0%	24.9%	13.6%
<b>Duty free store</b>	45.1%	13.1%	33.8%	34.2%	4.4%	10.2%
<b>Local shop/ artisan</b>	9.0%	18.2%	33.1%	0.0%	15.2%	30.4%

## STATEWIDE - ACTIVITIES – SHOPPING – JAPAN

	2017	2018	2019
<b>TOTAL</b>	96.6%	97.6%	98.0%
<b>Mall/ department store</b>	82.2%	79.9%	78.2%
<b>Designer boutique</b>	33.5%	25.1%	20.2%
<b>Hotel/ resort store</b>	39.2%	35.4%	34.7%
<b>Swap meet/ flea market</b>	8.9%	3.6%	3.6%
<b>Discount/ outlet store</b>	34.1%	23.7%	20.8%
<b>Supermarket</b>	57.7%	65.7%	68.6%
<b>Farmer's market</b>	18.6%	18.1%	19.1%
<b>Convenience store</b>	54.1%	45.6%	42.7%
<b>Duty free store</b>	43.6%	42.1%	32.1%
<b>Local shop/ artisan</b>	15.3%	10.7%	11.4%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	51.1%	44.5%	66.9%	32.9%	60.5%	69.5%
<b>Historic military site</b>	16.4%	13.9%	0.0%	0.0%	14.0%	17.0%
<b>Other historical site</b>	10.7%	24.4%	33.1%	32.9%	29.3%	28.7%
<b>Museum/ art gallery</b>	6.4%	3.5%	0.0%	0.0%	3.3%	6.8%
<b>Luau/ Polynesian show/ hula show</b>	13.7%	7.8%	17.2%	32.9%	13.3%	15.2%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	6.7%	2.6%	0.0%	32.9%	7.2%	15.4%
<b>Play/ concert/ theatre</b>	4.3%	0.9%	0.0%	0.0%	2.0%	3.4%
<b>Art/ craft fair</b>	3.9%	0.9%	0.0%	0.0%	2.2%	3.4%
<b>Festival event</b>	2.4%	0.9%	33.1%	0.0%	2.8%	1.8%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	2017	2018	2019
<b>TOTAL</b>	39.9%	55.5%	55.2%
<b>Historic military site</b>	11.3%	18.1%	16.0%
<b>Other historical site</b>	10.6%	18.1%	17.5%
<b>Museum/ art gallery</b>	6.9%	6.4%	5.5%
<b>Luau/ Polynesian show/ hula show</b>	10.5%	12.9%	14.0%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	6.3%	6.4%	7.1%
<b>Play/ concert/ theatre</b>	2.3%	3.1%	3.6%
<b>Art/ craft fair</b>	2.2%	3.4%	3.4%
<b>Festival event</b>	3.2%	3.1%	2.6%

## ACTIVITIES – TRANSPORTATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.4%	93.0%	100.0%	100.0%	97.9%	98.3%
<b>Airport shuttle</b>	27.3%	20.9%	0.0%	32.9%	20.8%	6.8%
<b>Trolley</b>	57.4%	21.0%	0.0%	0.0%	16.0%	3.4%
<b>Public bus</b>	18.4%	6.1%	0.0%	0.0%	2.4%	1.8%
<b>Tour bus/ tour van</b>	27.2%	21.7%	66.9%	34.2%	36.7%	40.6%
<b>Taxi/ limo</b>	33.0%	15.6%	0.0%	32.9%	18.4%	17.0%
<b>Rental car</b>	22.0%	42.4%	50.3%	0.0%	51.7%	45.8%
<b>Ride share</b>	5.9%	6.0%	0.0%	0.0%	3.6%	0.0%
<b>Bicycle rental</b>	3.8%	2.6%	0.0%	0.0%	0.7%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – JAPAN

	2017	2018	2019
<b>TOTAL</b>	98.6%	95.9%	96.9%
<b>Airport shuttle</b>	32.0%	24.0%	25.5%
<b>Trolley</b>	56.1%	46.1%	44.1%
<b>Public bus</b>	19.2%	16.9%	13.3%
<b>Tour bus/ tour van</b>	31.2%	27.0%	31.1%
<b>Taxi/ limo</b>	33.2%	31.7%	28.5%
<b>Rental car</b>	23.4%	33.1%	32.8%
<b>Ride share</b>	NA	3.2%	5.2%
<b>Bicycle rental</b>	NA	2.9%	2.8%

## ACTIVITIES – OTHER – JAPAN

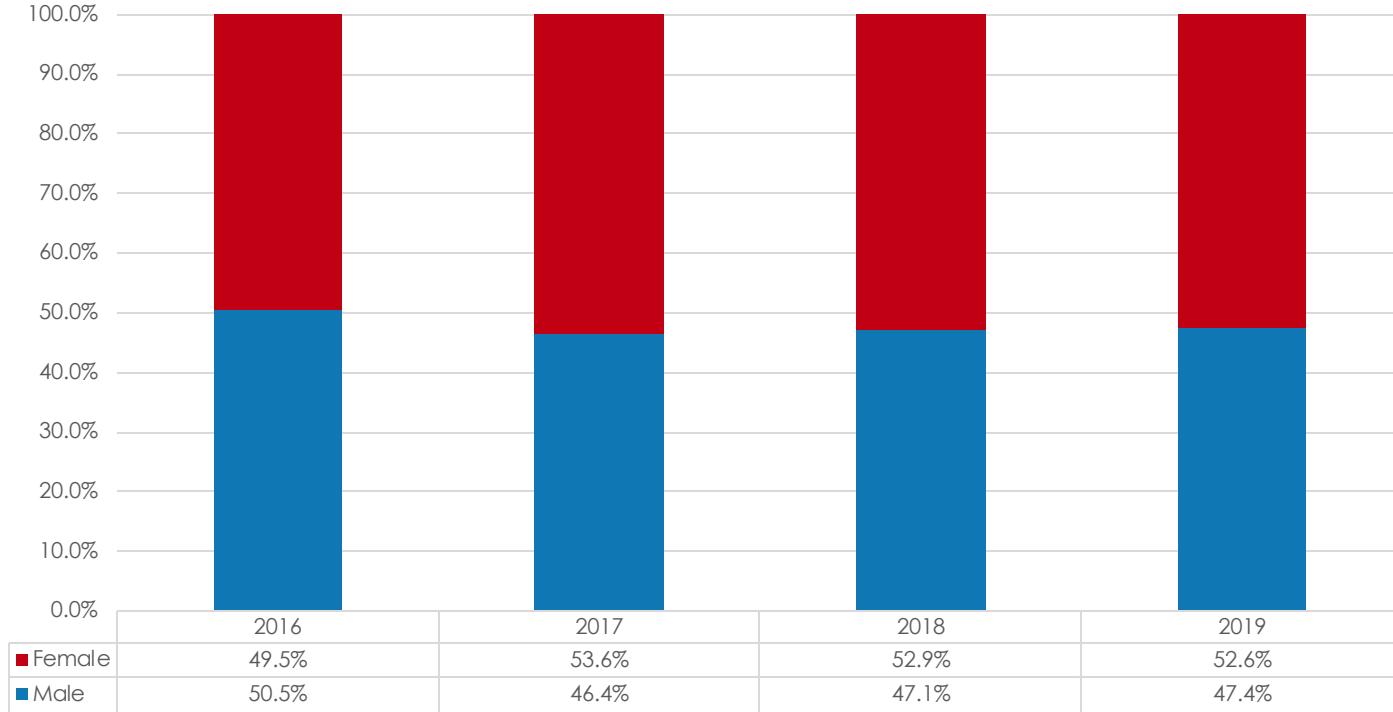
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	12.4%	15.7%	0.0%	0.0%	9.8%	8.5%
Visit friends/ family	11.7%	14.8%	0.0%	0.0%	9.4%	6.7%
Volunteer- non-profit	0.8%	0.9%	0.0%	0.0%	0.4%	1.8%

## ACTIVITIES – OTHER – JAPAN

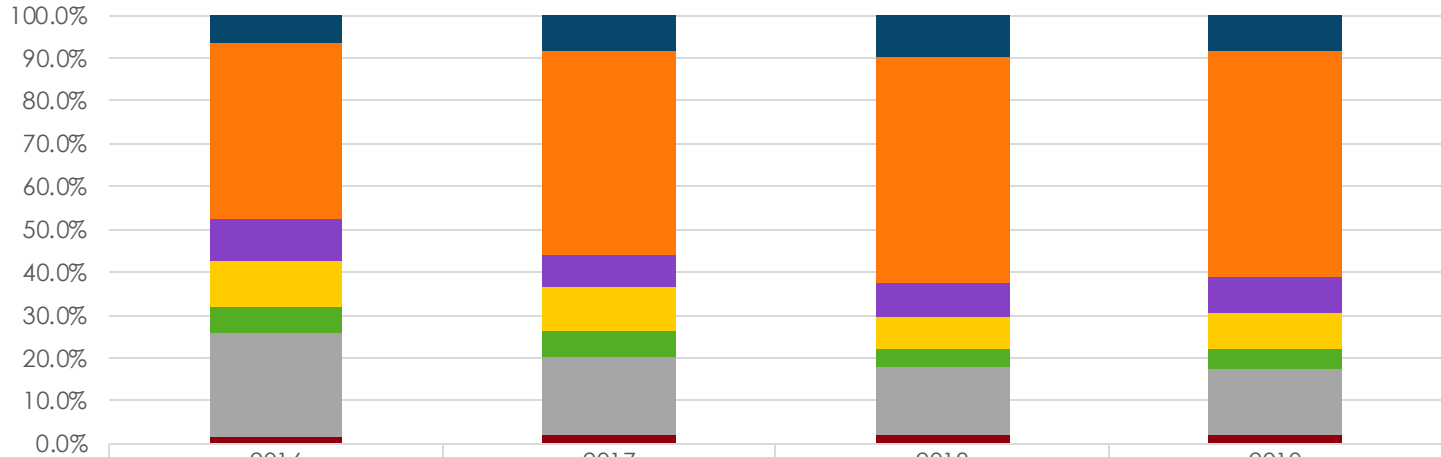
	2018	2019
<b>TOTAL</b>	12.6%	11.8%
<b>Visit friends/ family</b>	11.9%	11.3%
<b>Volunteer- non-profit</b>	0.9%	0.7%



# VISITOR PROFILE – GENDER – JAPAN

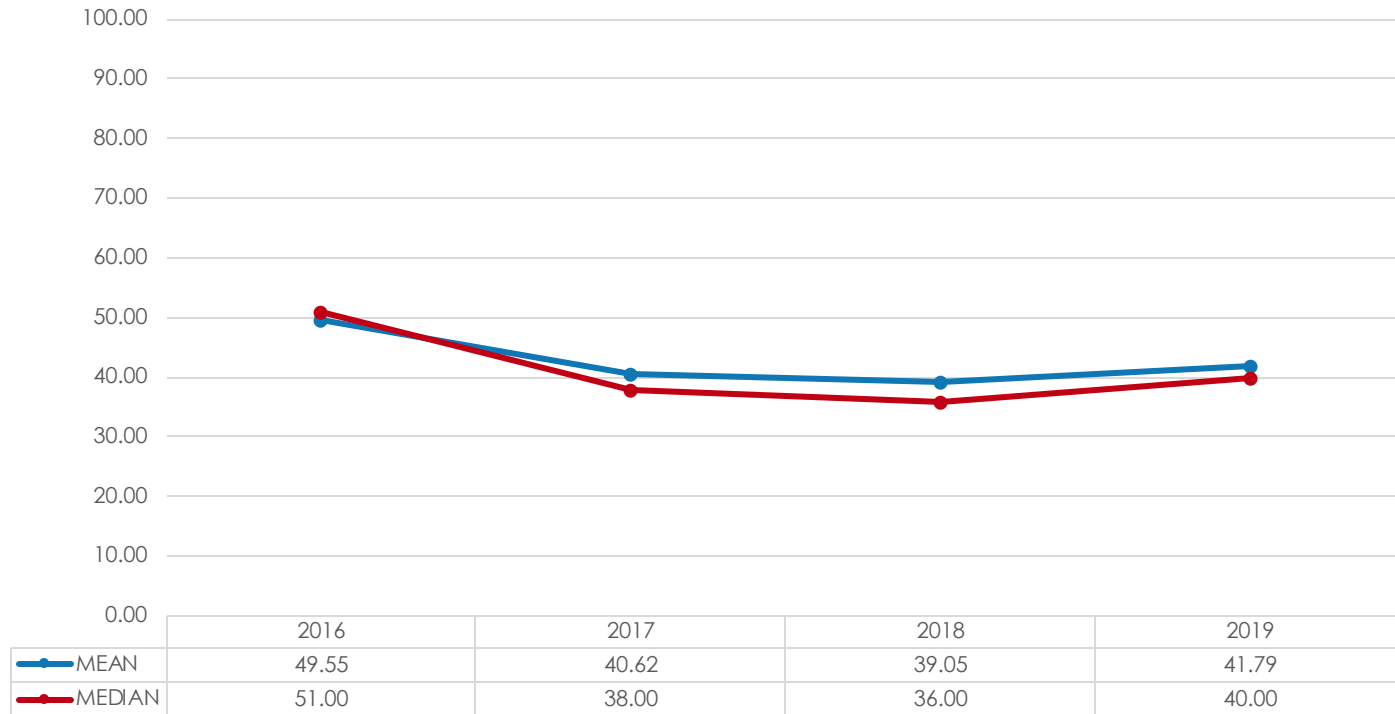


# VISITOR PROFILE – EDUCATION – JAPAN

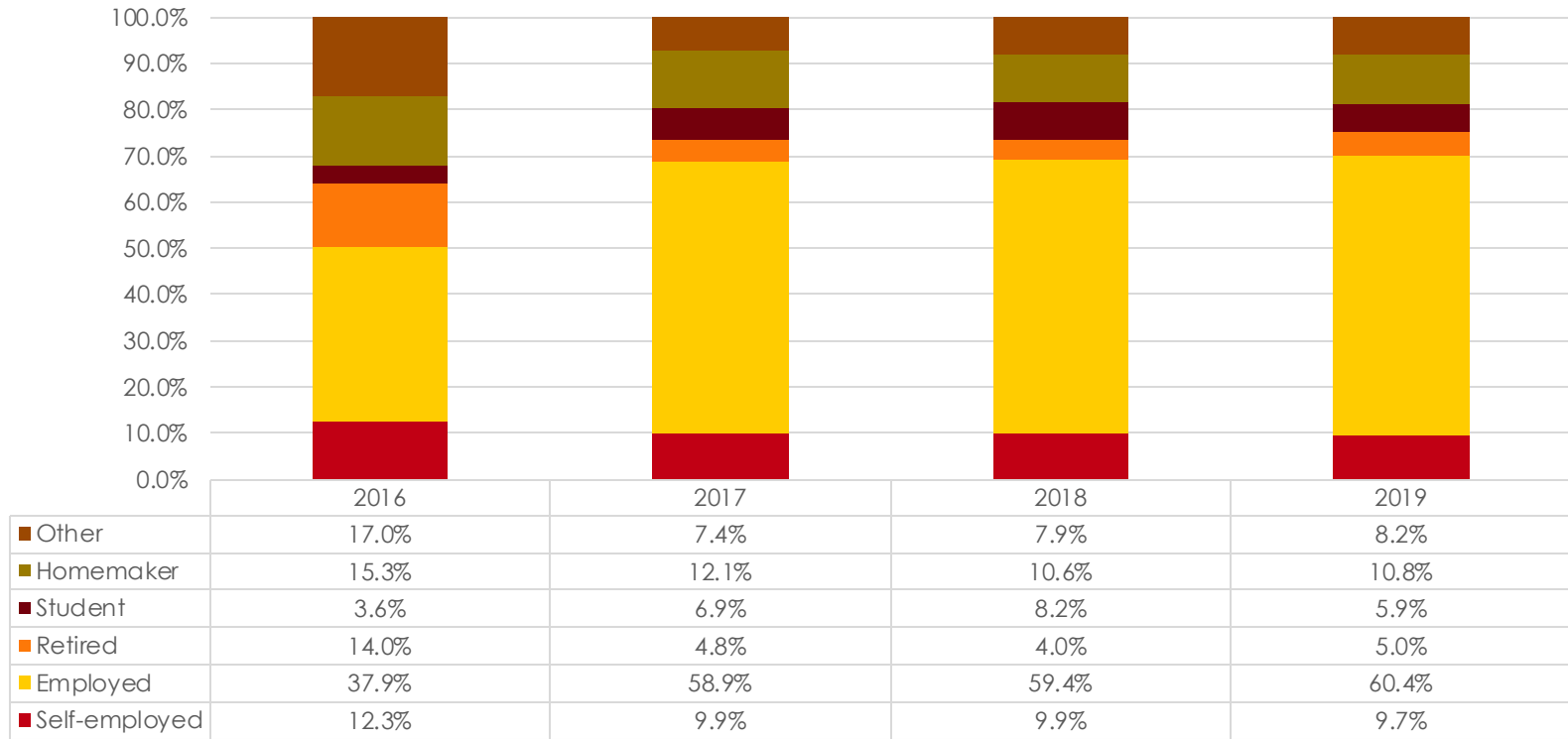


	2016	2017	2018	2019
■ Post-Graduate	6.5%	8.4%	9.8%	8.4%
■ College Grad	41.0%	47.5%	52.9%	52.6%
■ Associate Degree	9.9%	7.5%	8.0%	8.6%
■ Vocational/ Tech	10.7%	10.2%	7.3%	8.6%
■ Some College	5.8%	6.2%	4.4%	4.5%
■ H.S. Grad	24.6%	18.2%	15.6%	15.5%
■ Some / No H.S.	1.4%	1.9%	2.1%	1.9%

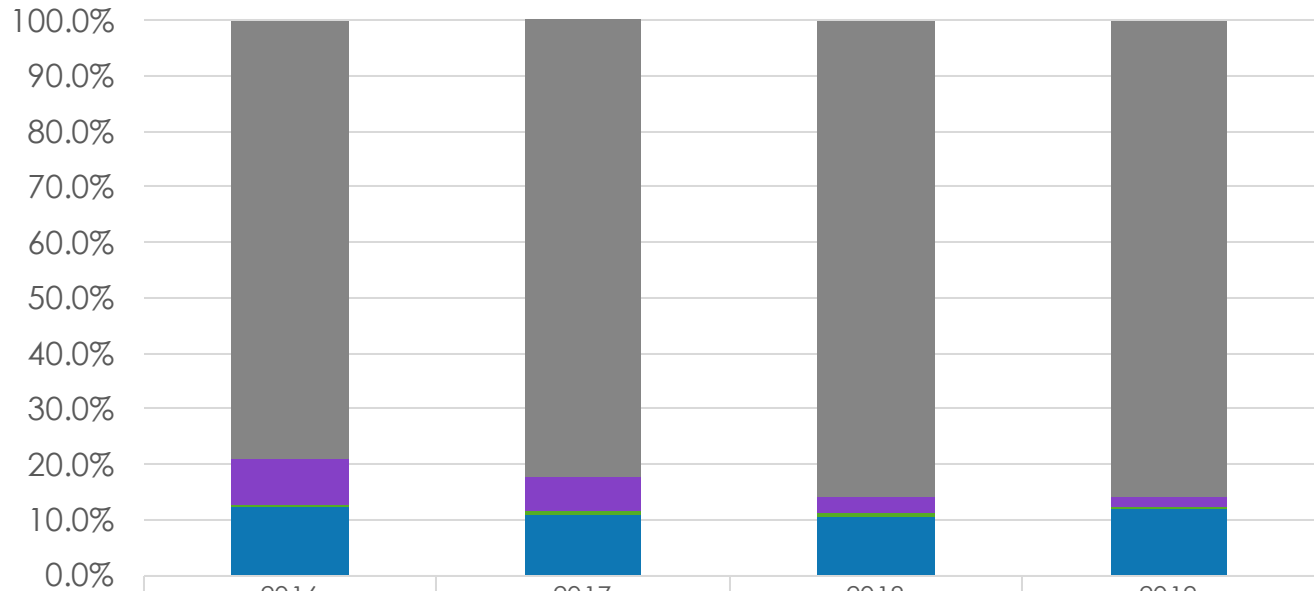
# VISITOR PROFILE – AGE – JAPAN



# VISITOR PROFILE – EMPLOYMENT STATUS – JAPAN



# VISITOR PROFILE – HAWAII PROPERTY OWNER – JAPAN



	2016	2017	2018	2019
Do not nor plan to purchase	79.0%	82.6%	85.9%	85.7%
Plan to in future	8.3%	5.8%	3.0%	2.0%
Other Property Type	0.4%	0.9%	0.6%	0.4%
Timeshare	12.2%	10.8%	10.5%	11.8%

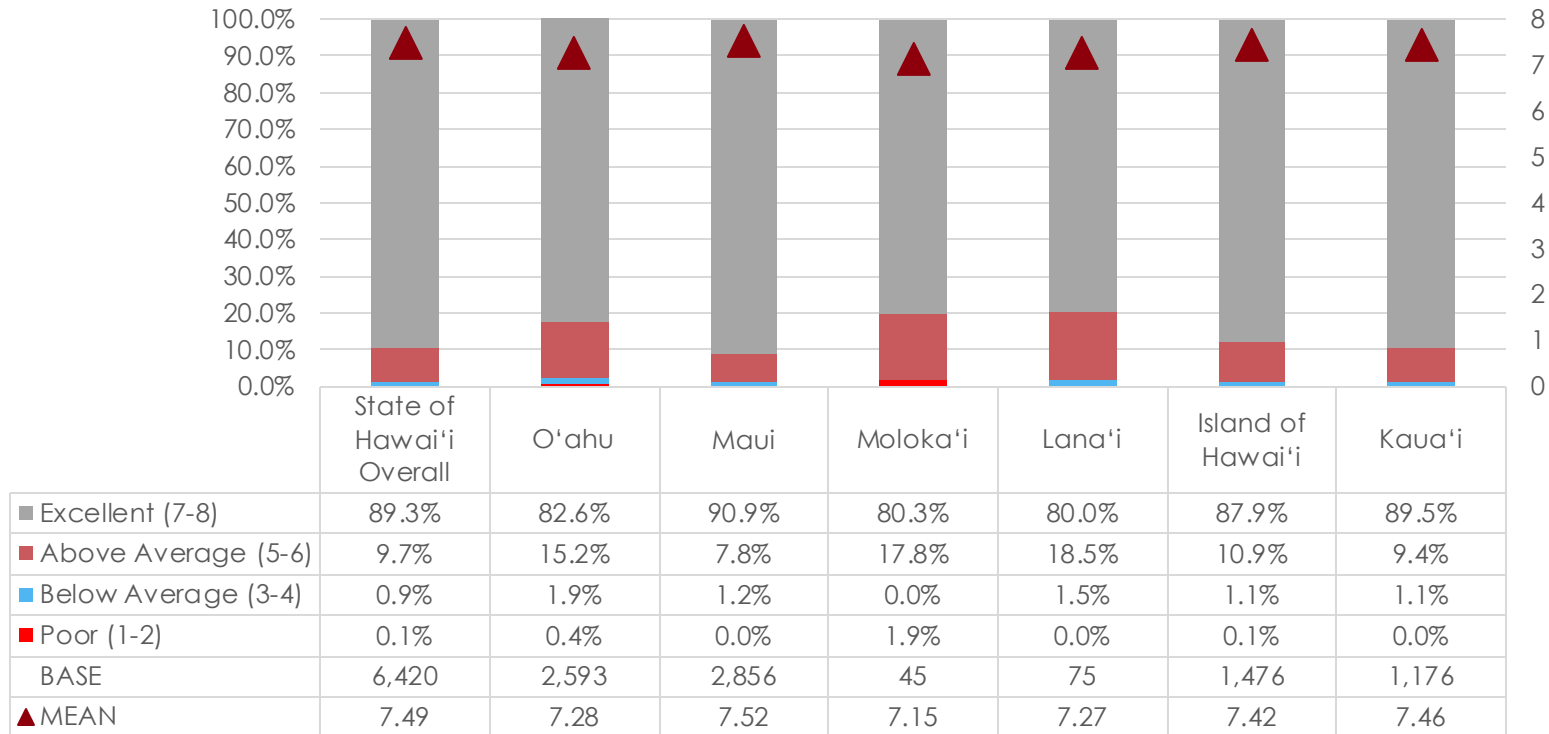
## VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	2018	2019
< ¥3.5 million	21.2%	17.0%
¥3.5 - ¥4.5 million	14.1%	13.6%
¥4.5 - ¥5.5 million	10.8%	10.5%
¥5.5 - ¥6.5 million	7.4%	7.8%
¥6.5 - ¥7.5 million	7.0%	6.2%
¥7.5 - ¥8.5 million	6.8%	7.7%
¥8.5 - ¥10.0 million	8.7%	9.9%
¥10.0 - ¥15.0 million	13.3%	15.3%
¥15.0 - ¥20.0 million	4.7%	5.8%
¥20.0 million +	5.9%	6.4%

# SECTION – CANADA

# OVERALL SATISFACTION – MOST RECENT VISIT – CANADA

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





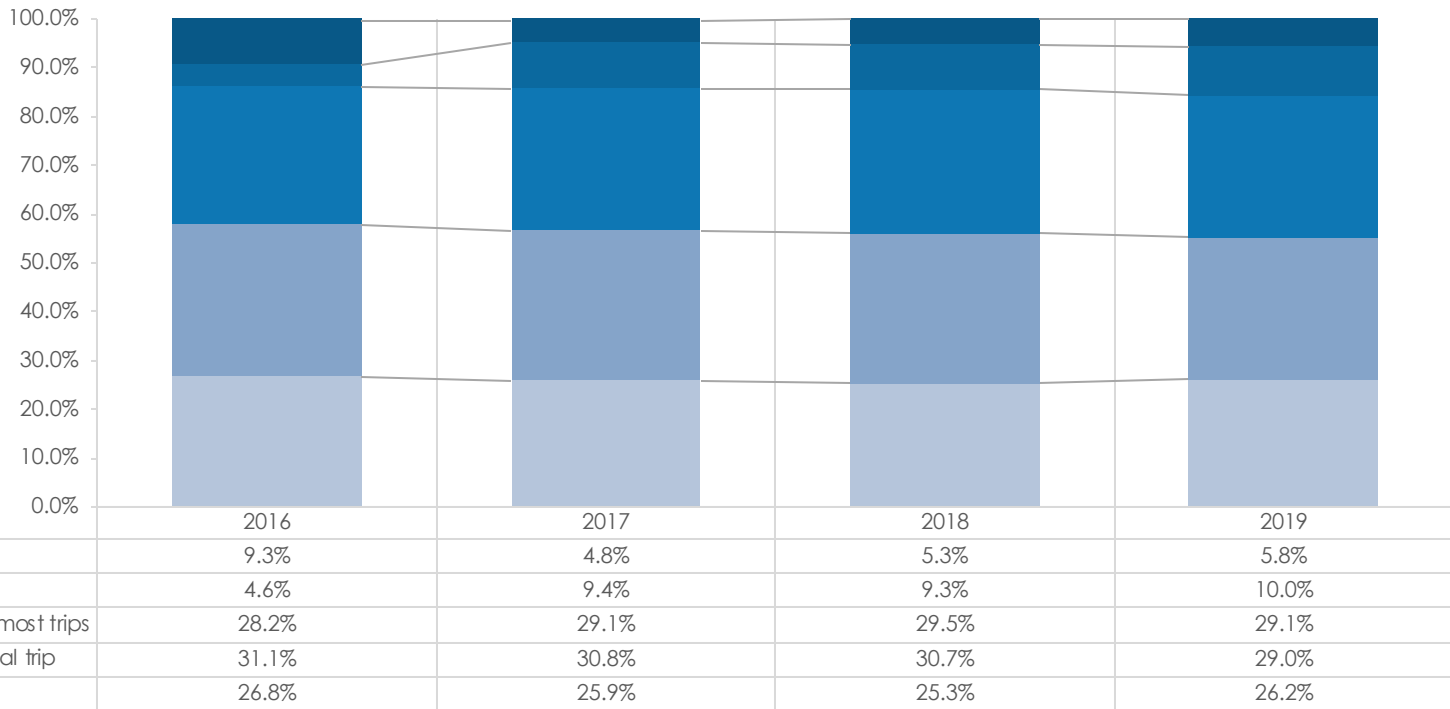
# PRIMARY TRIP PURPOSE CANADA

	2018	2019
Vacation	74.3%	74.5%
Anniversary/ birthday	5.7%	6.8%
Visit friends or relatives	3.1%	2.9%
Honeymoon	2.3%	2.6%
Attend wedding/vow renewal	2.8%	2.1%
Family gathering/reunion	2.1%	2.1%
Vacation home/timeshare	2.1%	1.9%
Convention, conference or seminar	1.8%	1.4%

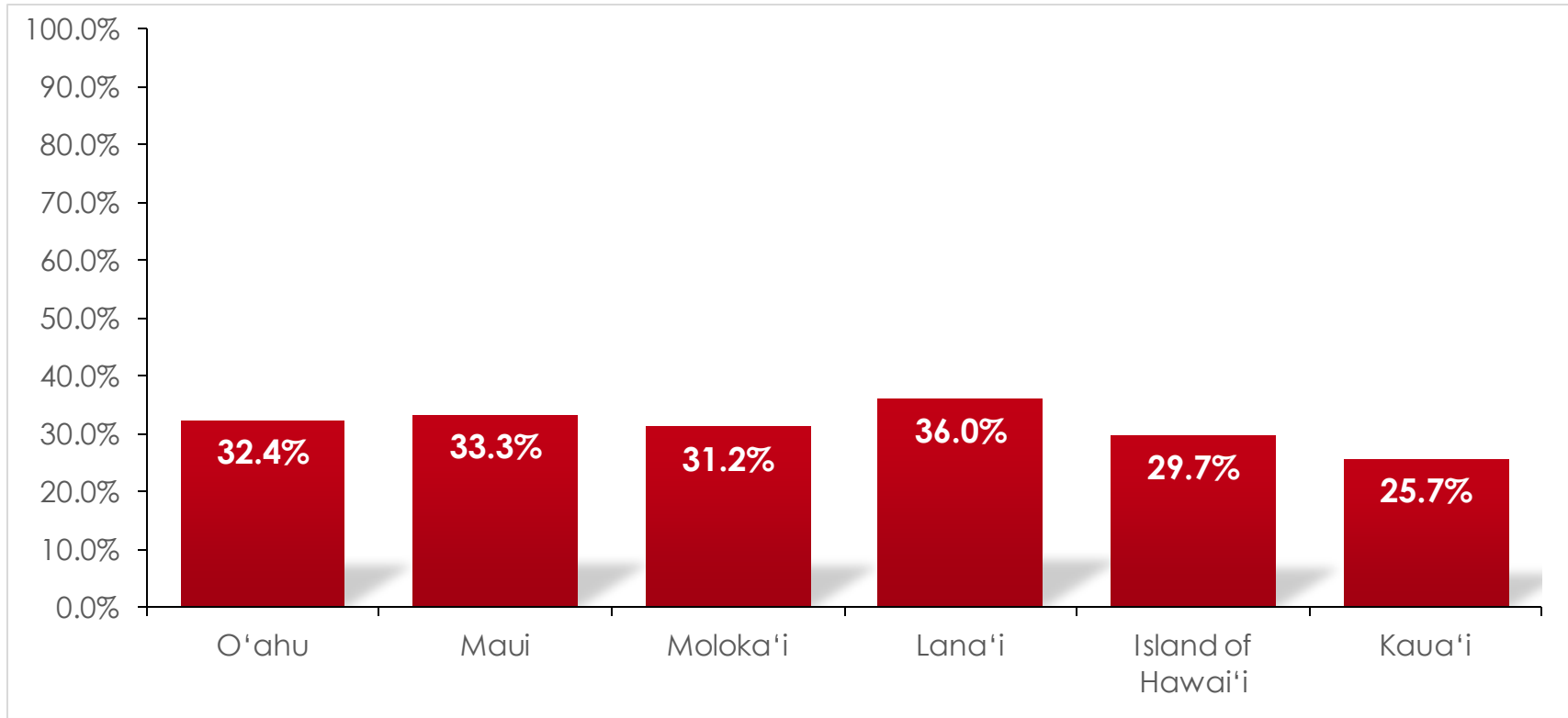
# TRIP PURPOSE – MULTIPLE RESPONSE CANADA

	2018	2019
Vacation	91.4%	91.7%
Anniversary/ birthday	12.1%	13.6%
Visit friends/ relatives	8.4%	7.1%
Family gathering/ reunion	5.4%	5.8%
Vacation home/ timeshare	5.1%	4.7%
Honeymoon	2.9%	2.9%
Attend wedding/ vow renewal	3.2%	2.4%
Convention, conference, seminar	2.5%	2.1%
Sporting event	2.1%	1.7%

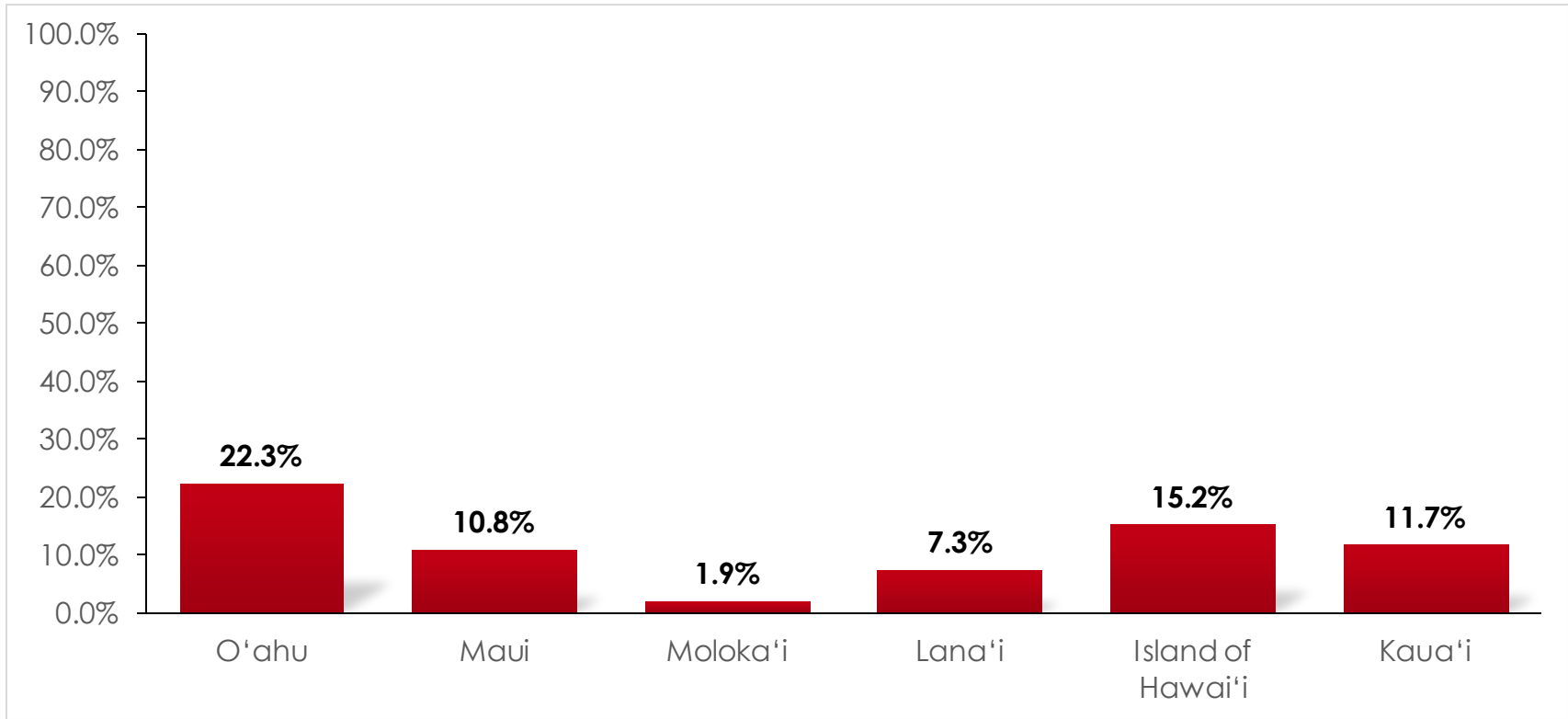
# VACATION TRIP DESCRIPTION – CANADA



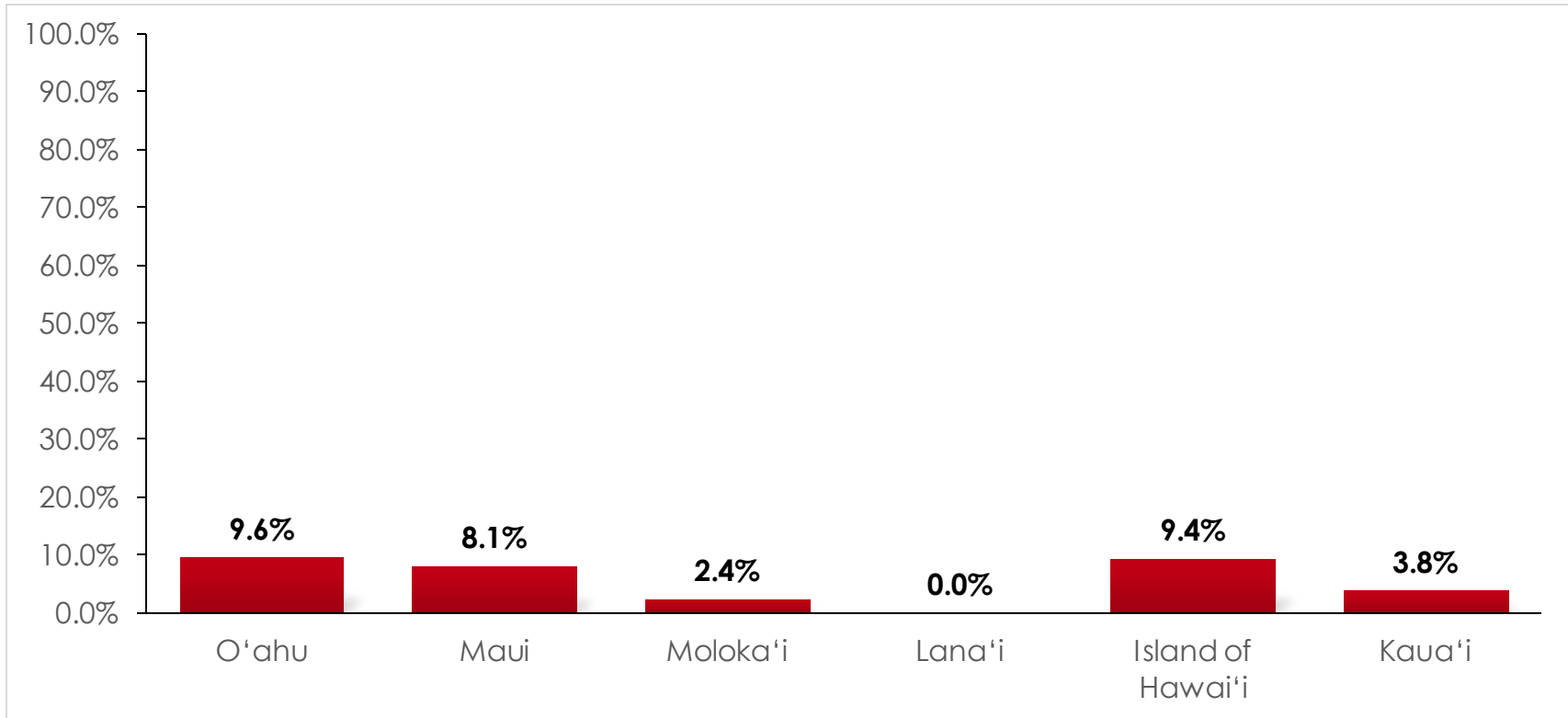
# ADVERTISING AWARENESS – CANADA



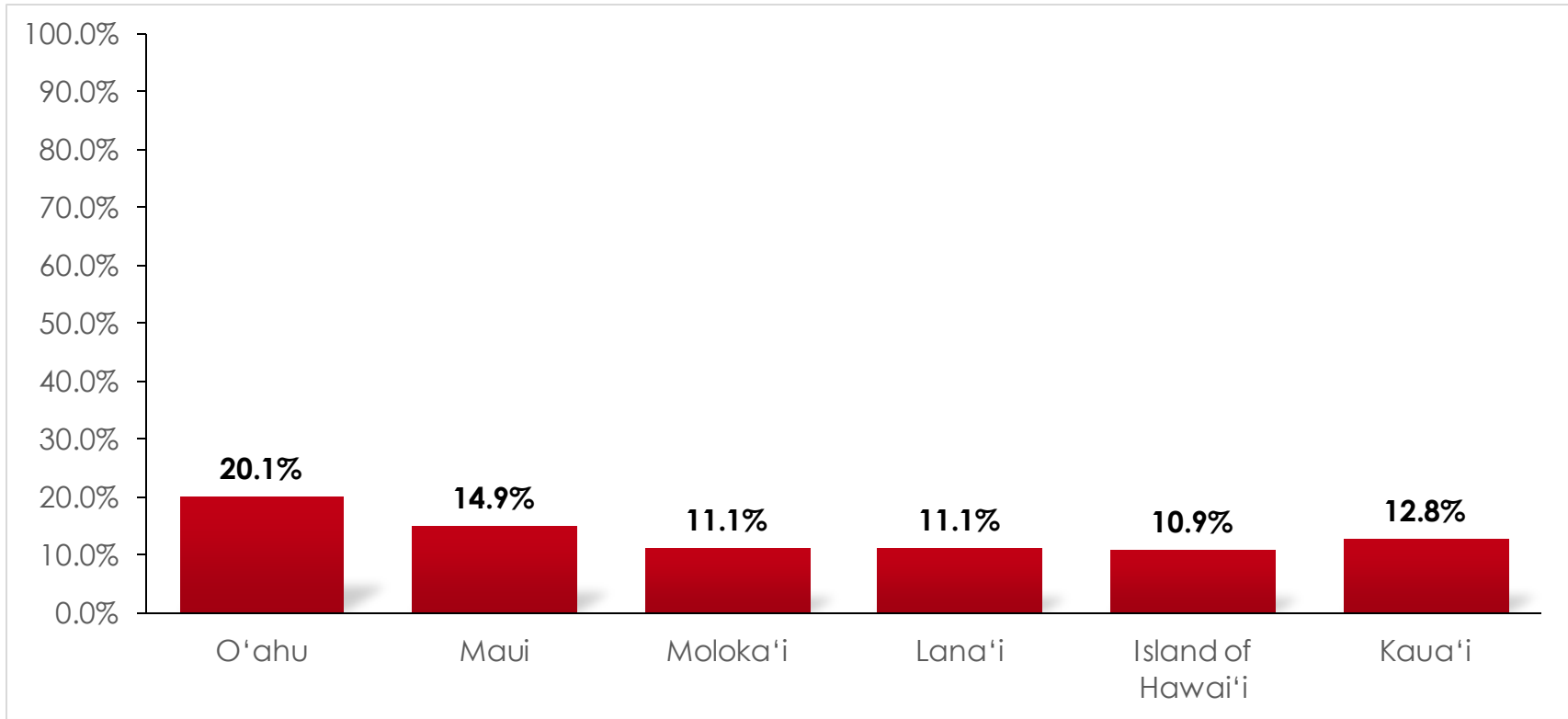
# IMPACT OF LOCATION FILMING – CANADA



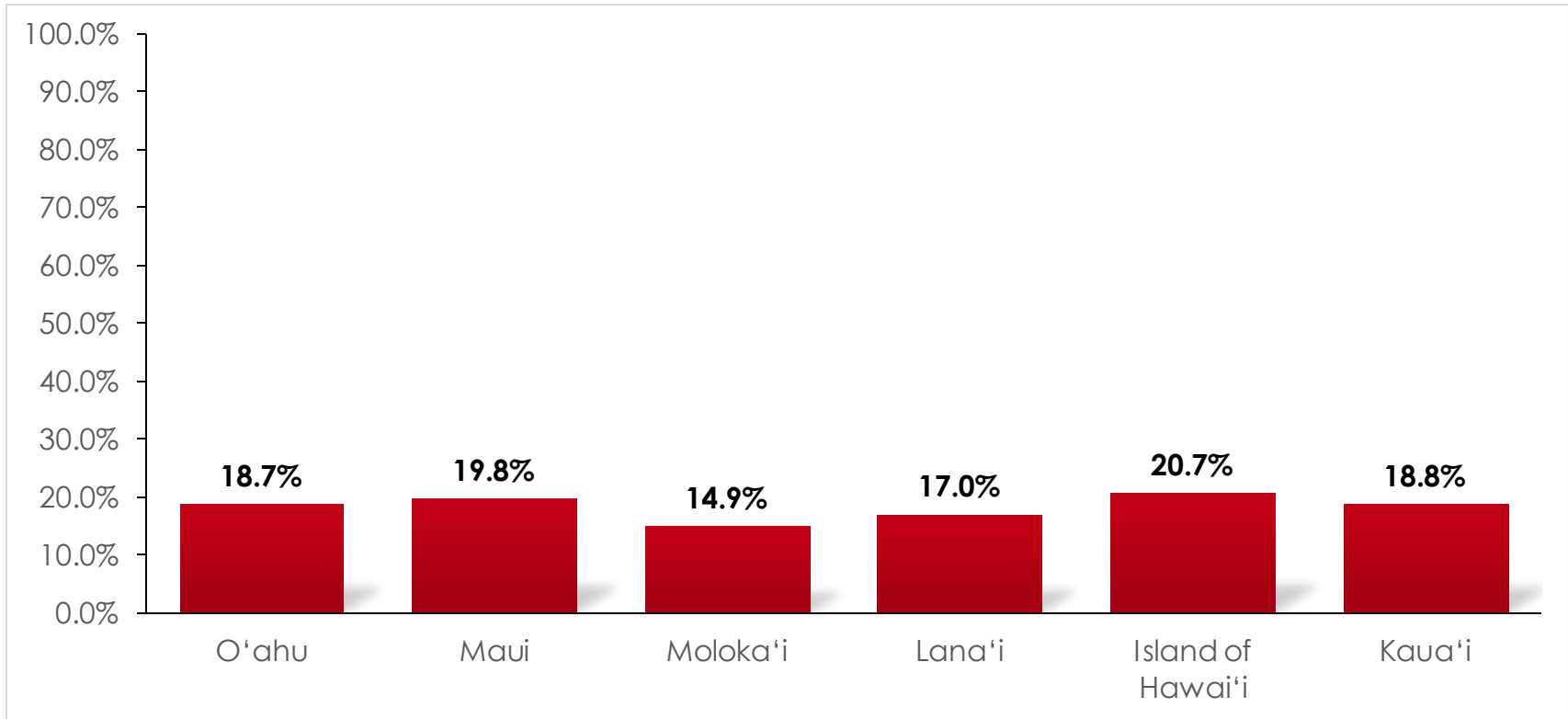
# IMPACT OF HAWAIIAN MUSIC – CANADA



# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS– CANADA

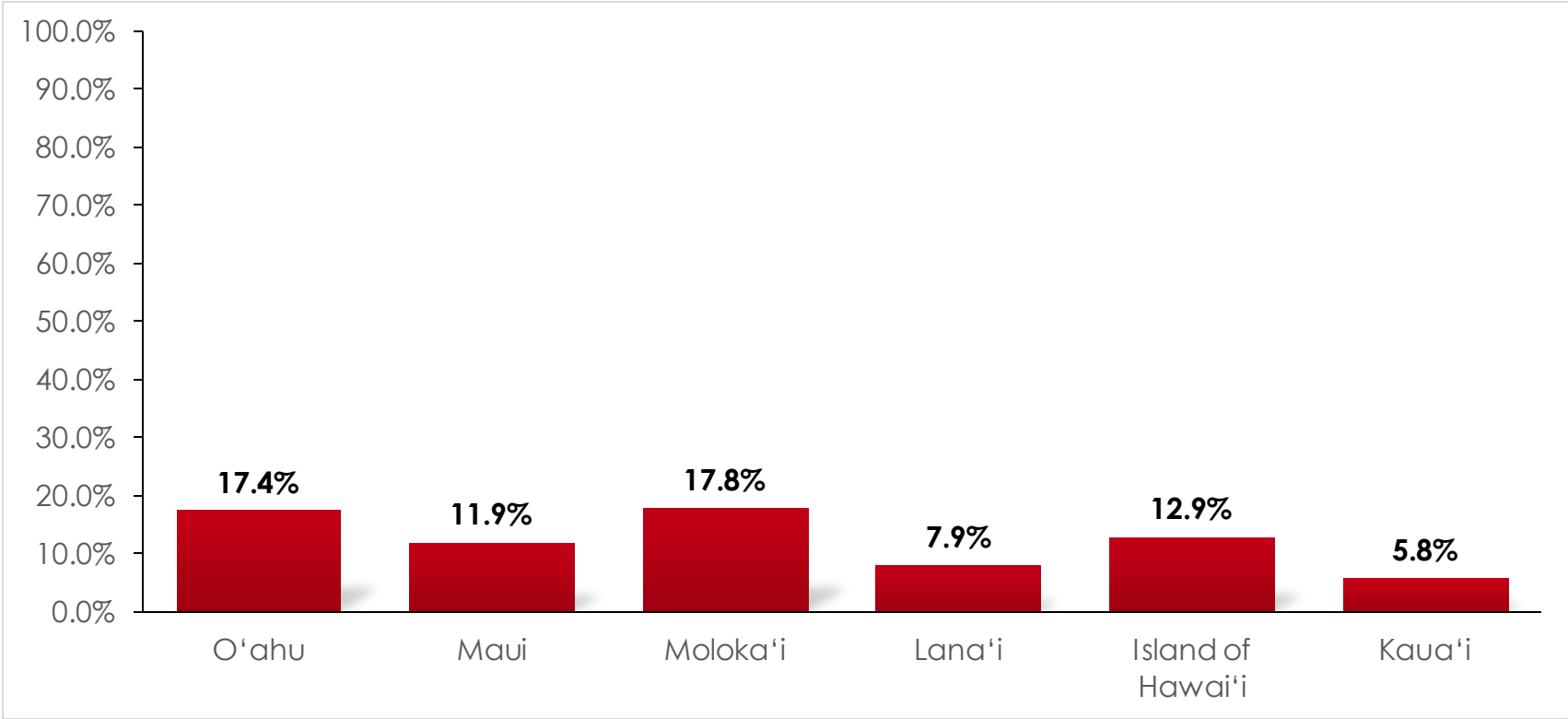


# IMPACT OF OUTDOOR/ SPORTING EVENTS – CANADA

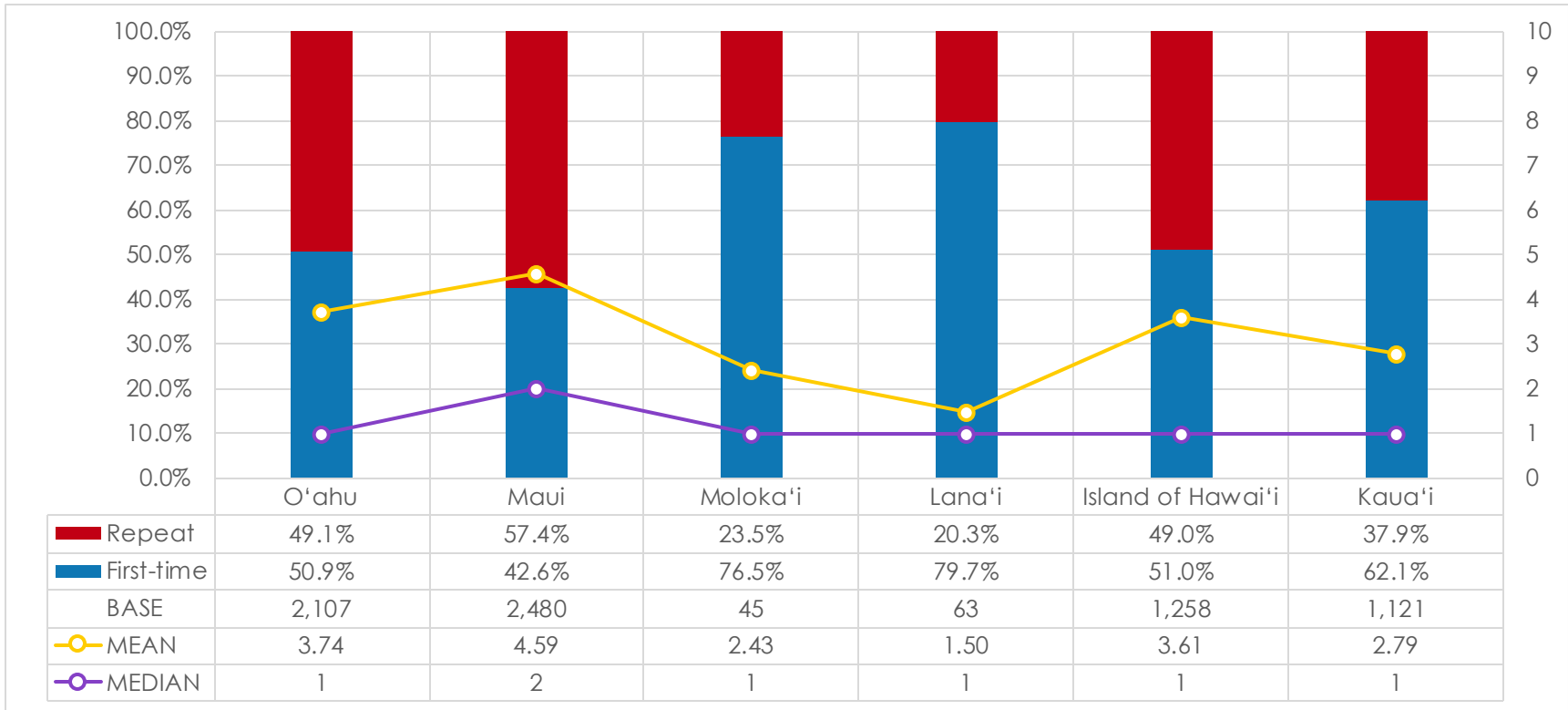




# IMPACT OF HAWAIIAN CULTURAL EVENTS – CANADA



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – CANADA

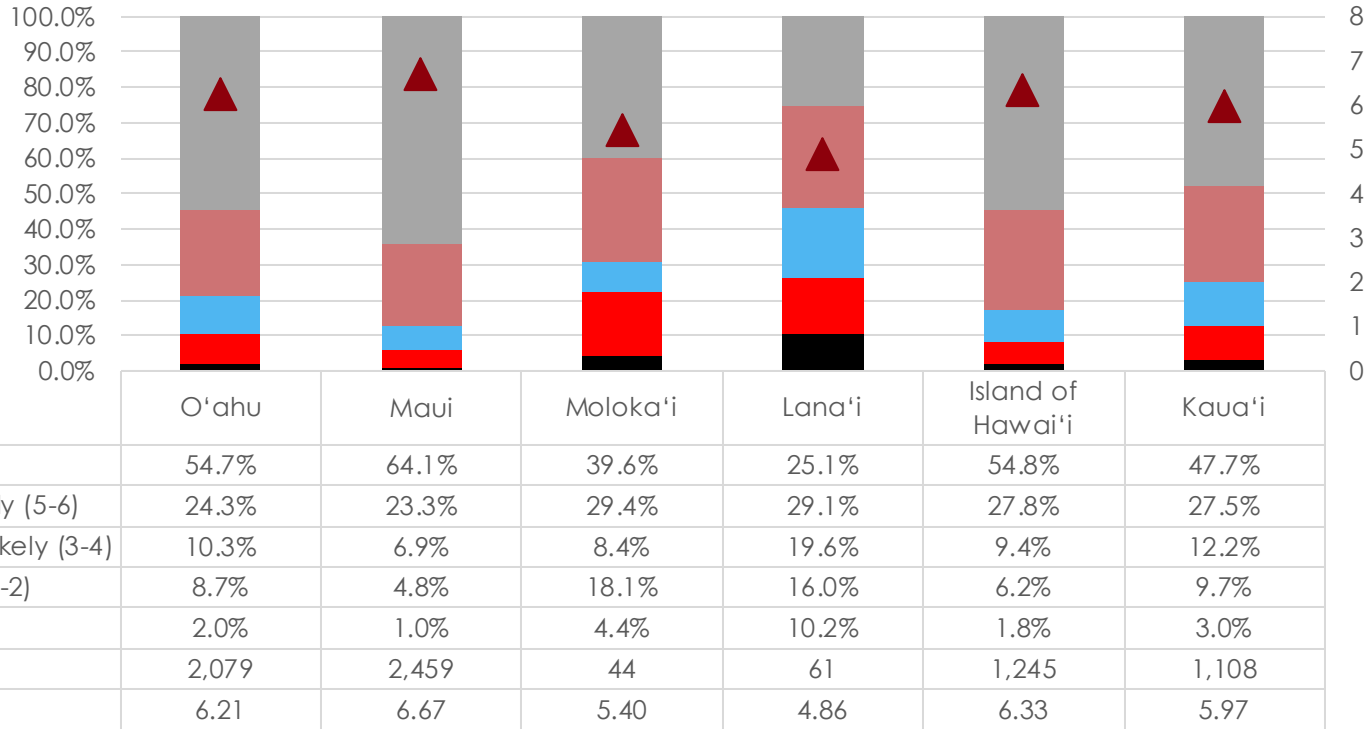


# TRAVEL PARTY MEMBERS – CANADA

	2016	2017	2018	2019
Spouse	69.7%	66.6%	63.3%	62.1%
Other adult family	27.2%	25.1%	28.6%	28.3%
Child under 18	23.2%	23.9%	22.9%	23.7%
Friends/ associates	18.6%	17.9%	18.2%	17.0%
Alone	6.6%	6.4%	6.0%	6.0%
Girlfriend/ boyfriend	6.7%	7.0%	8.3%	8.6%
Same-sex partner	.6%	.9%	0.9%	1.2%

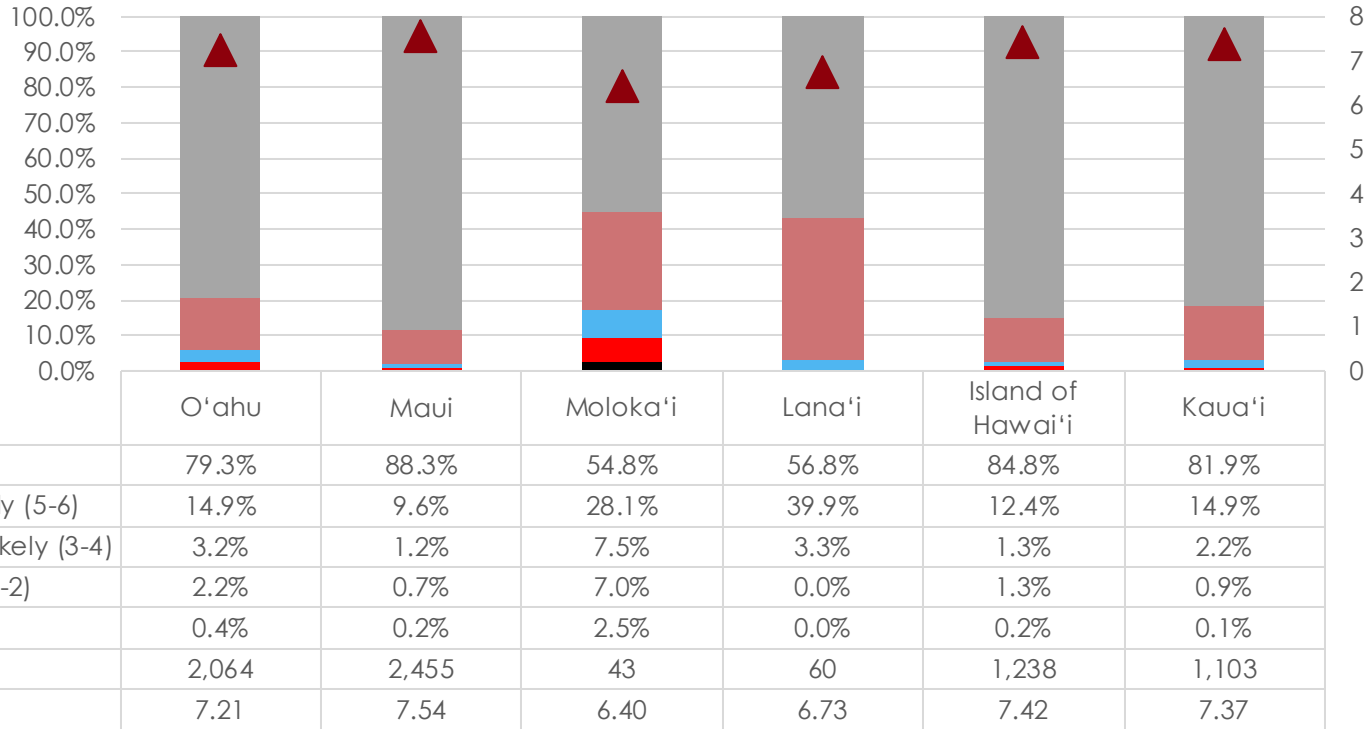
# LIKELIHOOD OF RETURN VISIT – CANADA

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



# BRAND/DESTINATION ADVOCACY – CANADA

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



221 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

# ACTIVITIES – SIGHTSEEING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.9%	96.8%	95.4%	86.4%	97.1%	96.7%
<b>On own (self-guided)</b>	75.1%	86.5%	61.4%	37.7%	87.9%	83.4%
<b>Helicopter/ airplane</b>	2.4%	5.5%	9.7%	3.0%	6.4%	19.2%
<b>Boat/ submarine/ whale</b>	15.3%	30.4%	18.5%	22.9%	22.2%	26.6%
<b>Visit towns</b>	43.9%	60.9%	32.7%	19.1%	60.1%	60.6%
<b>Limo/ van/ bus tour</b>	15.0%	6.3%	11.3%	10.0%	7.7%	7.3%
<b>Scenic views/ natural landmark</b>	61.0%	61.4%	41.5%	32.1%	67.4%	72.8%
<b>Movie/ TV/ film location</b>	11.7%	0.8%	4.6%	0.0%	1.9%	4.6%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - CANADA

	2017	2018	2019
<b>TOTAL</b>	97.9%	96.7%	96.2%
<b>On own (self-guided)</b>	87.5%	85.5%	84.0%
<b>Helicopter/ airplane</b>	10.1%	8.9%	7.6%
<b>Boat/ submarine/ whale</b>	29.6%	25.2%	25.7%
<b>Visit towns</b>	40.0%	59.5%	57.0%
<b>Limo/ van/ bus tour</b>	11.2%	10.8%	9.7%
<b>Scenic views/ natural landmark</b>	76.6%	68.0%	65.2%
<b>Movie/ TV/ film location</b>	5.9%	5.0%	5.1%

# ACTIVITIES – RECREATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	97.3%	98.8%	90.3%	86.7%	97.8%	98.4%
<b>Beach/ sunbathing</b>	89.2%	92.6%	67.1%	65.3%	85.3%	86.3%
<b>Bodyboard/ Standup paddle board</b>	13.2%	18.0%	2.6%	0.0%	18.2%	15.8%
<b>Surfing</b>	11.4%	10.6%	0.0%	1.5%	5.2%	10.1%
<b>Canoeing/ kayak</b>	4.6%	3.1%	5.1%	0.0%	8.5%	12.1%
<b>Swim- ocean</b>	74.2%	80.4%	53.3%	42.5%	75.1%	71.5%
<b>Snorkel</b>	43.4%	59.6%	37.5%	39.9%	60.2%	49.5%
<b>Windsurf/ Kitesurf</b>	0.2%	0.6%	0.0%	0.0%	0.2%	0.0%
<b>Jet ski/ Parasail</b>	1.4%	1.1%	0.0%	0.0%	0.6%	0.1%
<b>Scuba</b>	2.4%	2.7%	0.0%	1.5%	4.2%	2.6%
<b>Fishing</b>	1.5%	2.5%	4.6%	0.0%	2.9%	1.9%
<b>Golf</b>	2.7%	8.6%	2.6%	7.0%	9.3%	8.2%



# STATEWIDE - ACTIVITIES – RECREATION – CANADA

	2017	2018	2019
<b>TOTAL</b>	98.7%	98.2%	98.6%
<b>Beach/ sunbathing</b>	91.2%	90.6%	90.7%
<b>Bodyboard/ Standup paddle board</b>	23.9%	17.1%	17.2%
<b>Surfing</b>	12.0%	10.5%	10.3%
<b>Canoeing/ kayak</b>	8.4%	7.0%	6.4%
<b>Swim- ocean</b>	NA	76.5%	77.6%
<b>Snorkel</b>	NA	54.0%	55.3%
<b>Windsurf/ Kitesurf</b>	0.8%	0.5%	0.3%
<b>Jet ski/ Parasail</b>	1.3%	1.2%	1.0%
<b>Scuba</b>	5.0%	3.6%	3.1%
<b>Fishing</b>	2.5%	2.4%	2.4%
<b>Golf</b>	9.5%	8.0%	7.5%

# ACTIVITIES – RECREATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.3%	98.8%	90.3%	86.7%	97.8%	98.4%
<b>Run/ Jog/ Fitness walk</b>	25.1%	29.9%	17.9%	3.0%	26.5%	27.7%
<b>Spa</b>	5.3%	8.0%	0.0%	1.5%	4.9%	3.7%
<b>Hiking</b>	52.2%	45.0%	47.0%	21.8%	56.7%	56.3%
<b>Backpack/Camp</b>	2.0%	2.4%	0.0%	0.0%	2.0%	4.0%
<b>Agritourism</b>	12.9%	8.0%	14.8%	5.2%	17.0%	9.3%
<b>Sport event/ tournament</b>	3.7%	2.0%	0.0%	0.0%	3.6%	1.0%
<b>Park/ botanical garden</b>	38.3%	33.2%	16.9%	10.3%	47.3%	40.2%
<b>Waterpark</b>	3.0%	0.9%	4.6%	0.0%	1.2%	0.6%
<b>Mountain tube/ waterfall rappel</b>	0.8%	0.7%	0.0%	0.0%	0.8%	6.5%
<b>Zip-lining</b>	1.5%	3.9%	0.0%	0.0%	3.0%	3.7%
<b>Skydiving</b>	0.8%	0.2%	0.0%	0.0%	0.1%	0.0%
<b>All terrain vehicle (ATV)</b>	2.6%	0.9%	0.0%	4.8%	1.5%	4.7%
<b>Horseback riding</b>	1.7%	1.1%	0.0%	1.5%	2.5%	1.8%

# STATEWIDE - ACTIVITIES – RECREATION – CANADA

	2017	2018	2019
<b>TOTAL</b>	98.7%	98.2%	98.6%
<b>Run/ Jog/ Fitness walk</b>	41.0%	33.1%	28.9%
<b>Spa</b>	6.6%	6.7%	6.4%
<b>Hiking</b>	29.3%	35.5%	52.2%
<b>Backpack/Camp</b>	*	*	2.6%
<b>Agritourism</b>	9.5%	12.5%	12.1%
<b>Sport event/ tournament</b>	3.2%	3.6%	2.8%
<b>Park/ botanical garden</b>	46.2%	43.4%	39.8%
<b>Waterpark</b>	NA	1.6%	1.7%
<b>Mountain tube/ waterfall rappel</b>	NA	1.5%	1.8%
<b>Zip-lining</b>	NA	3.6%	3.2%
<b>Skydiving</b>	NA	0.4%	0.3%
<b>All terrain vehicle (ATV)</b>	NA	2.3%	2.3%
<b>Horseback riding</b>	NA	1.9%	1.8%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.5%	98.6%	86.1%	76.7%	98.4%	96.2%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	18.8%	20.9%	24.2%	21.8%	19.2%	20.7%
<b>Live music/ stage show</b>	31.9%	27.5%	16.9%	0.0%	28.9%	24.8%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.5%	5.6%	0.0%	1.5%	5.3%	4.4%
<b>Fine dining</b>	41.4%	47.8%	27.6%	15.5%	39.7%	40.8%
<b>Family restaurant</b>	62.6%	62.9%	42.4%	6.0%	60.2%	54.8%
<b>Fast food</b>	57.1%	37.5%	25.0%	8.1%	42.0%	36.0%
<b>Food truck</b>	43.9%	34.7%	12.3%	0.0%	16.9%	39.8%
<b>Café/ coffee house</b>	49.9%	48.7%	25.0%	21.4%	56.0%	48.5%
<b>Ethnic dining</b>	28.0%	23.6%	10.2%	5.2%	23.3%	21.0%
<b>Prepared own meal</b>	46.2%	73.6%	59.8%	15.1%	72.5%	66.7%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – CANADA

	2017	2018	2019
<b>TOTAL</b>	99.0%	98.6%	98.4%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	27.4%	21.9%	21.2%
<b>Live music/ stage show</b>	33.0%	33.3%	30.7%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.3%	8.6%	7.2%
<b>Fine dining</b>	47.5%	48.1%	44.8%
<b>Family restaurant</b>	71.9%	63.4%	62.8%
<b>Fast food</b>	44.1%	47.1%	45.0%
<b>Food truck</b>	NA	35.2%	36.1%
<b>Café/ coffee house</b>	54.8%	52.4%	52.1%
<b>Ethnic dining</b>	26.5%	26.7%	25.6%
<b>Prepared own meal</b>	69.3%	68.2%	66.8%

## ACTIVITIES – SHOPPING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.1%	96.7%	84.1%	45.0%	97.1%	94.7%
<b>Mall/ department store</b>	66.5%	54.2%	15.9%	3.3%	47.4%	37.1%
<b>Designer boutique</b>	18.3%	19.7%	5.1%	4.5%	13.7%	14.8%
<b>Hotel/ resort store</b>	34.2%	26.9%	13.9%	7.8%	27.1%	16.8%
<b>Swap meet/ flea market</b>	17.2%	19.7%	9.7%	1.5%	12.0%	7.3%
<b>Discount/ outlet store</b>	22.5%	27.9%	2.1%	3.3%	12.7%	14.0%
<b>Supermarket</b>	58.6%	76.0%	42.9%	6.3%	75.4%	70.7%
<b>Farmer's market</b>	28.4%	38.5%	42.4%	0.0%	58.1%	47.5%
<b>Convenience store</b>	61.3%	49.9%	34.8%	8.5%	42.3%	38.7%
<b>Duty free store</b>	10.9%	5.0%	2.6%	3.7%	3.5%	2.1%
<b>Local shop/ artisan</b>	53.1%	65.9%	57.9%	25.4%	66.2%	71.2%

## STATEWIDE - ACTIVITIES – SHOPPING – CANADA

	2017	2018	2019
<b>TOTAL</b>	97.8%	97.4%	96.5%
<b>Mall/ department store</b>	59.7%	59.1%	56.2%
<b>Designer boutique</b>	25.4%	19.9%	18.4%
<b>Hotel/ resort store</b>	27.5%	27.4%	28.8%
<b>Swap meet/ flea market</b>	23.0%	17.4%	16.7%
<b>Discount/ outlet store</b>	25.6%	22.5%	22.6%
<b>Supermarket</b>	66.0%	73.9%	72.3%
<b>Farmer's market</b>	42.4%	44.7%	43.1%
<b>Convenience store</b>	50.0%	52.7%	51.9%
<b>Duty free store</b>	5.9%	7.4%	6.5%
<b>Local shop/ artisan</b>	71.7%	66.7%	64.7%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	75.6%	62.9%	59.5%	41.4%	71.1%	61.5%
<b>Historic military site</b>	41.3%	3.7%	11.3%	7.8%	8.6%	4.6%
<b>Other historical site</b>	23.7%	18.9%	34.3%	22.1%	39.3%	27.2%
<b>Museum/ art gallery</b>	15.2%	18.1%	9.7%	11.5%	17.3%	13.5%
<b>Luau/ Polynesian show/ hula show</b>	35.0%	30.8%	18.5%	4.5%	28.2%	26.0%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	9.3%	6.9%	7.2%	0.0%	5.9%	3.4%
<b>Play/ concert/ theatre</b>	5.9%	3.7%	2.1%	1.8%	3.2%	2.3%
<b>Art/ craft fair</b>	8.2%	13.8%	14.4%	0.0%	14.3%	16.0%
<b>Festival event</b>	6.0%	3.3%	4.6%	5.2%	5.3%	3.7%



## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

	2017	2018	2019
<b>TOTAL</b>	74.7%	72.9%	69.7%
<b>Historic military site</b>	23.6%	16.8%	16.7%
<b>Other historical site</b>	33.1%	29.4%	26.5%
<b>Museum/ art gallery</b>	22.8%	19.8%	17.6%
<b>Luau/ Polynesian show/ hula show</b>	36.5%	34.4%	32.9%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	5.1%	8.2%	7.4%
<b>Play/ concert/ theatre</b>	6.1%	5.5%	4.4%
<b>Art/ craft fair</b>	14.2%	14.5%	13.7%
<b>Festival event</b>	10.4%	6.0%	5.0%

# ACTIVITIES – TRANSPORTATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	95.4%	96.0%	88.2%	63.8%	94.5%	95.3%
<b>Airport shuttle</b>	25.9%	13.7%	11.3%	10.0%	16.2%	13.7%
<b>Trolley</b>	8.8%	4.2%	4.6%	0.0%	3.6%	2.0%
<b>Public bus</b>	25.3%	3.8%	6.7%	0.0%	2.7%	2.9%
<b>Tour bus/ tour van</b>	17.1%	6.9%	20.1%	23.6%	7.0%	10.7%
<b>Taxi/ limo</b>	24.4%	6.9%	16.4%	12.1%	9.0%	5.4%
<b>Rental car</b>	60.2%	88.1%	57.3%	22.6%	86.2%	83.9%
<b>Ride share</b>	23.8%	9.7%	4.1%	3.0%	8.1%	5.0%
<b>Bicycle rental</b>	3.1%	1.7%	2.6%	0.0%	2.3%	6.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – CANADA

	2017	2018	2019
<b>TOTAL</b>	97.8%	96.0%	95.3%
<b>Airport shuttle</b>	23.8%	22.2%	18.6%
<b>Trolley</b>	4.7%	4.5%	5.5%
<b>Public bus</b>	12.6%	11.1%	10.4%
<b>Tour bus/ tour van</b>	11.5%	12.4%	10.9%
<b>Taxi/ limo</b>	17.5%	15.3%	13.0%
<b>Rental car</b>	82.8%	81.1%	79.9%
<b>Ride share</b>	NA	9.1%	13.7%
<b>Bicycle rental</b>	NA	3.4%	3.2%

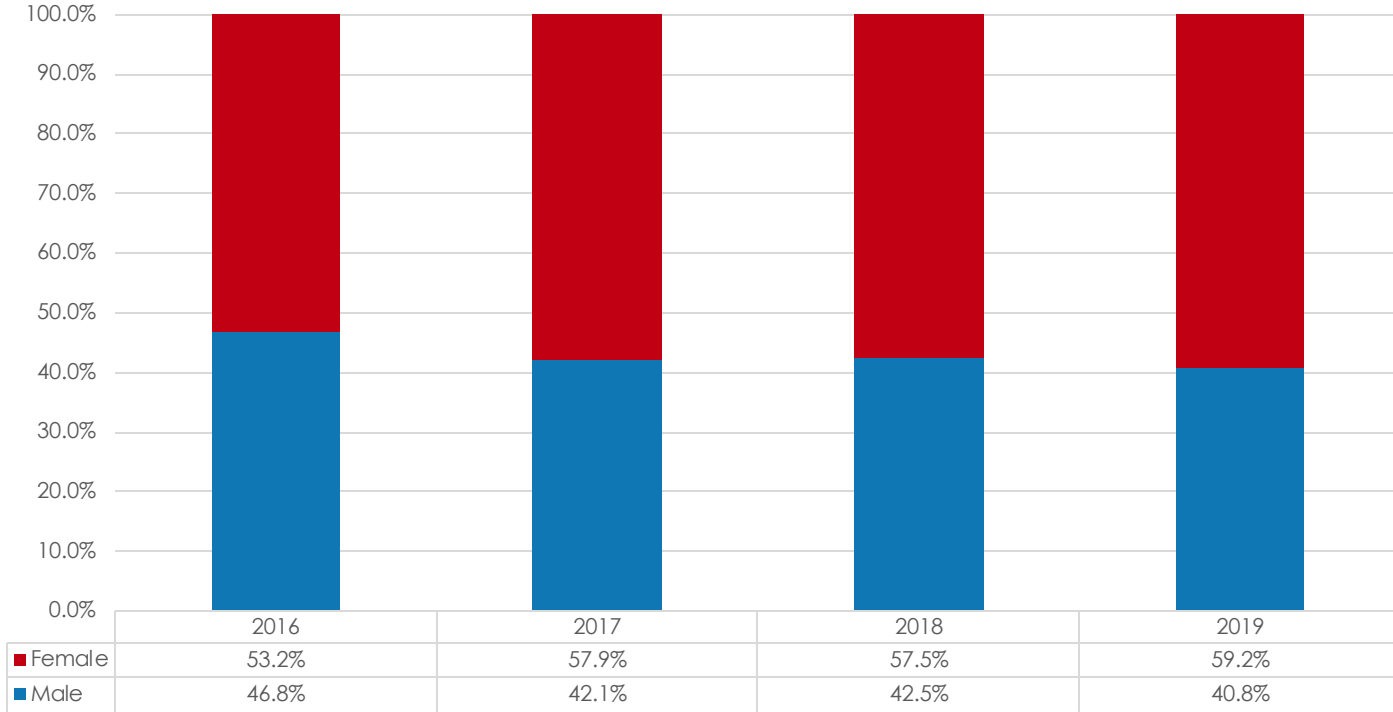
## ACTIVITIES – OTHER – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	18.4%	17.4%	20.6%	5.2%	19.3%	13.5%
Visit friends/ family	17.6%	17.0%	18.5%	1.8%	18.2%	12.7%
Volunteer- non-profit	0.8%	0.6%	2.1%	3.3%	1.3%	1.0%

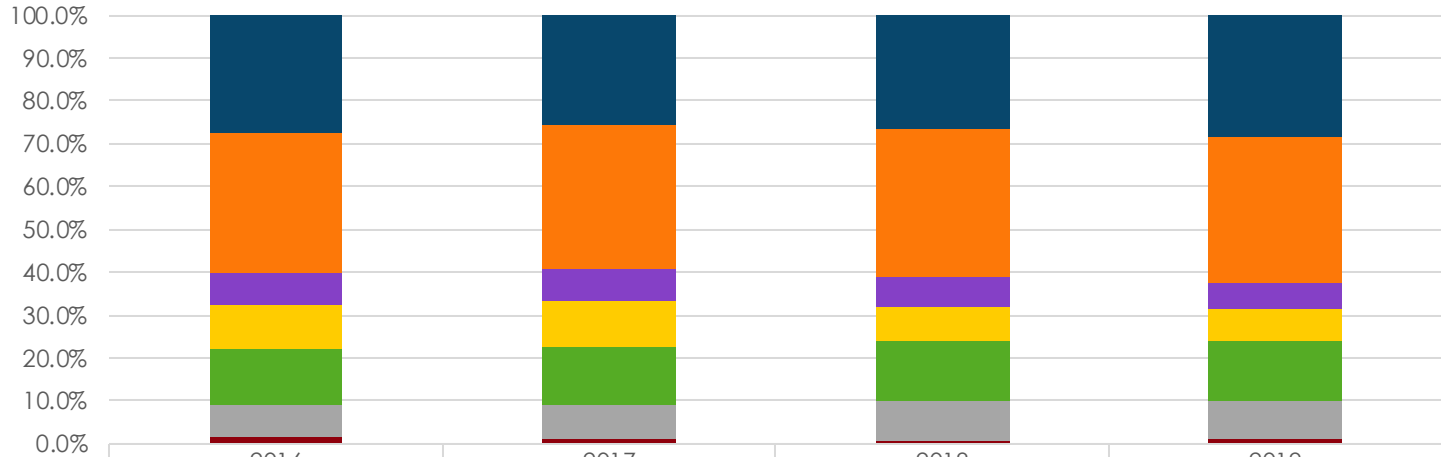
## ACTIVITIES – OTHER – CANADA

	2018	2019
<b>TOTAL</b>	20.1%	18.6%
<b>Visit friends/ family</b>	19.0%	17.9%
<b>Volunteer- non-profit</b>	1.3%	0.9%

# VISITOR PROFILE – GENDER – CANADA

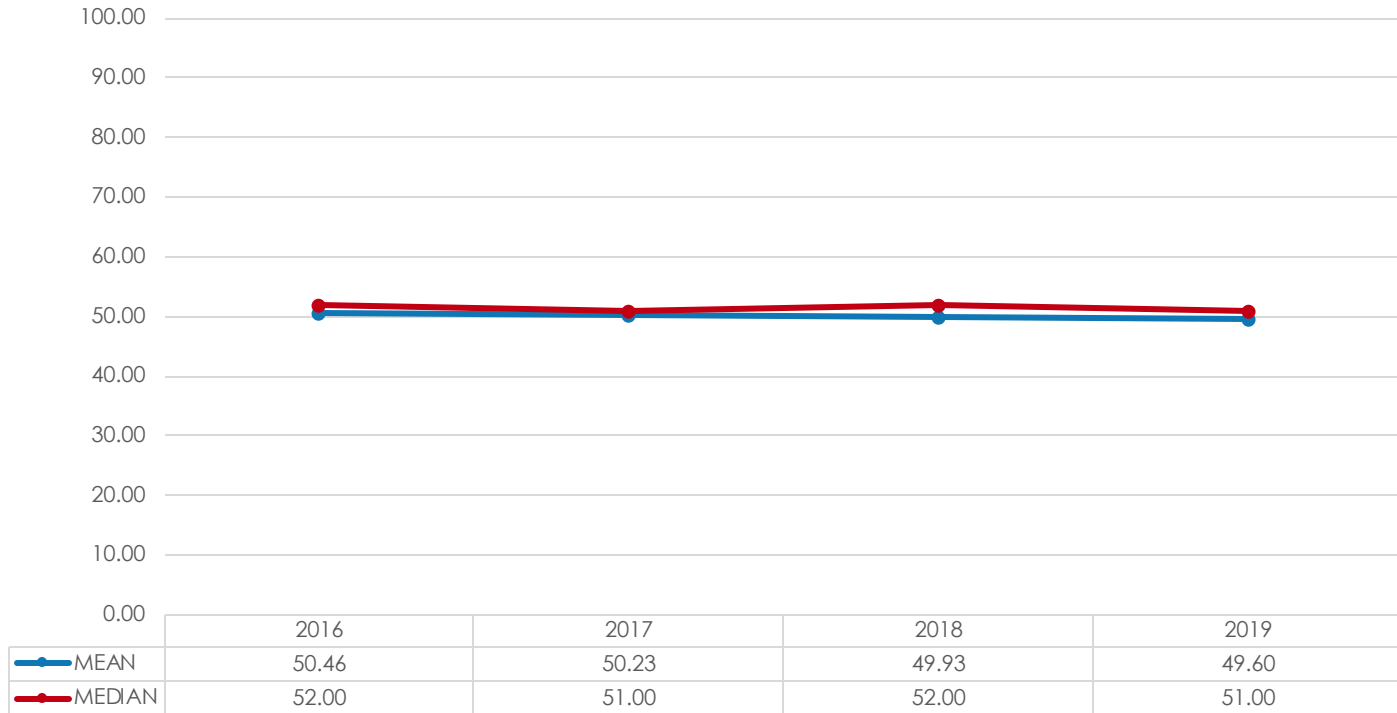


# VISITOR PROFILE – EDUCATION – CANADA



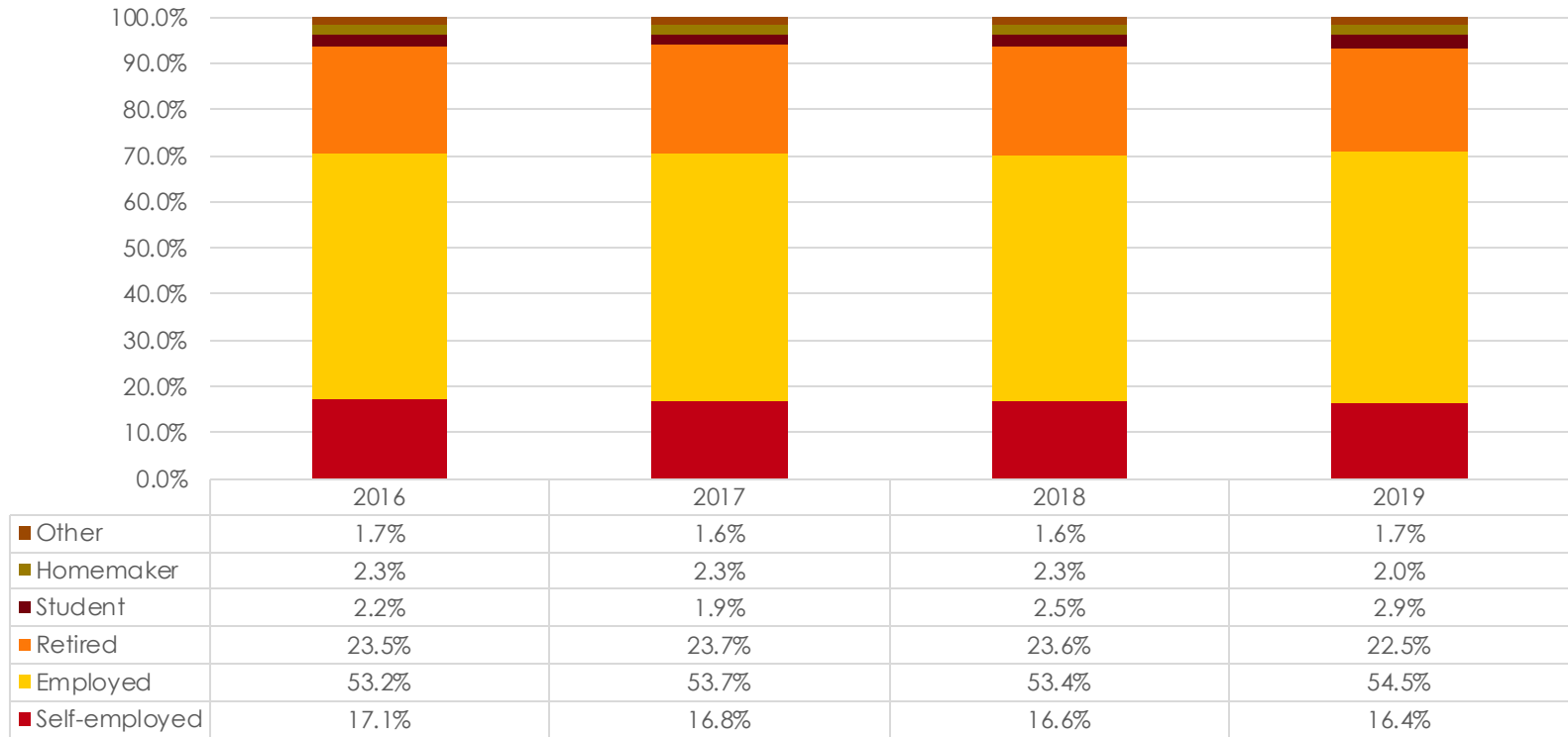
	2016	2017	2018	2019
■ Post-Graduate	28.1%	25.8%	26.7%	28.4%
■ College Grad	32.6%	33.6%	34.6%	34.3%
■ Associate Degree	7.7%	7.5%	6.7%	6.1%
■ Vocational/ Tech	10.0%	10.4%	7.9%	7.3%
■ Some College	13.4%	13.6%	14.3%	14.0%
■ H.S. Grad	7.1%	8.1%	9.2%	9.0%
■ Some / No H.S.	1.7%	1.0%	0.6%	0.9%

# VISITOR PROFILE – AGE – CANADA

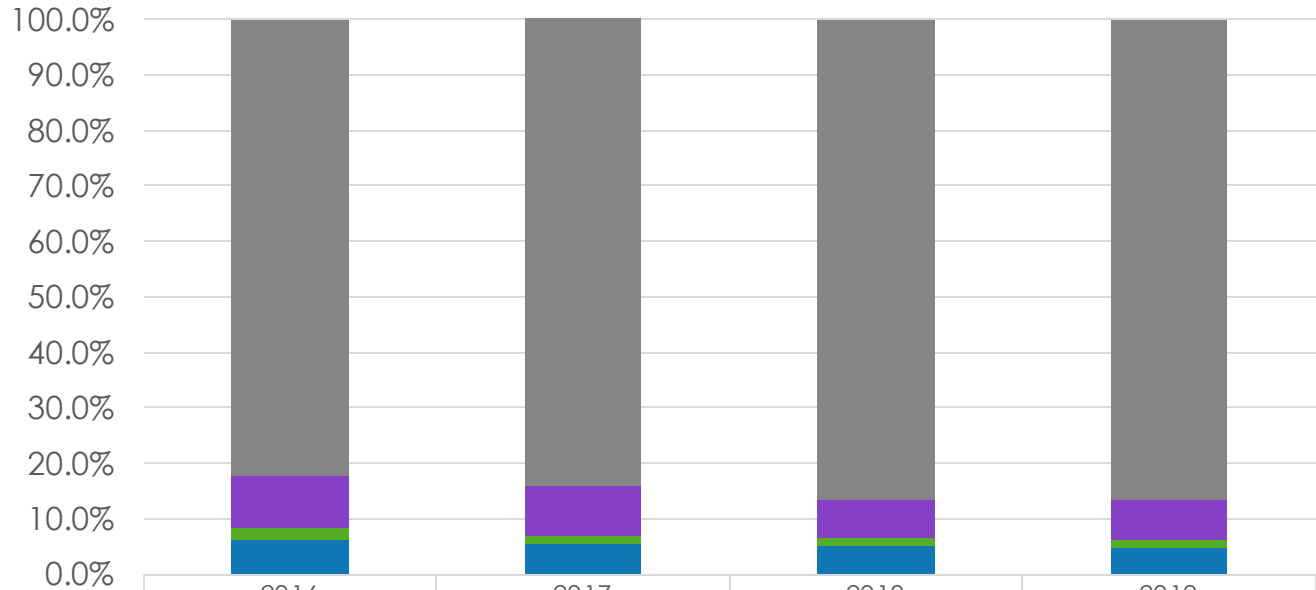




# VISITOR PROFILE – EMPLOYMENT STATUS – CANADA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – CANADA

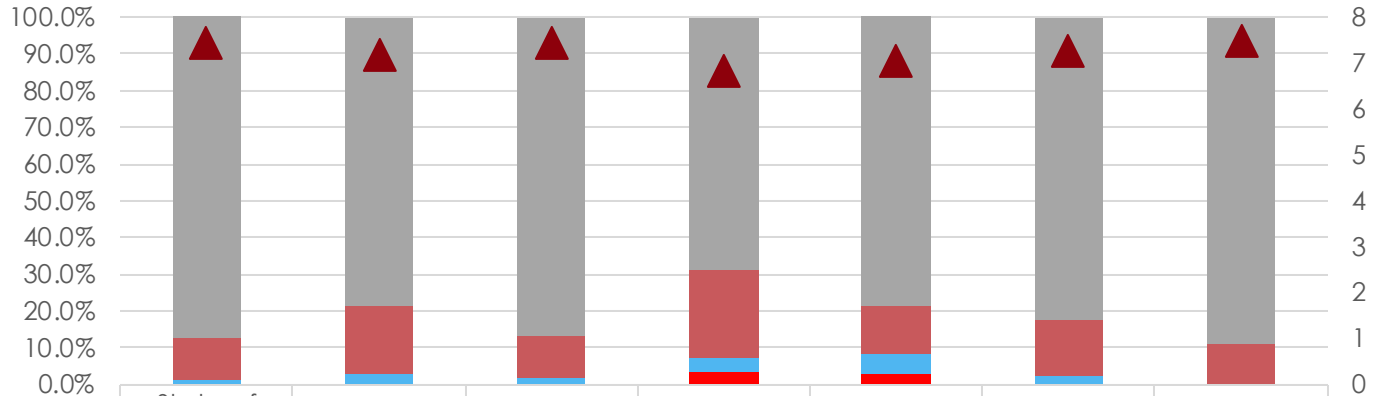


	2016	2017	2018	2019
■ Do not nor plan to purchase	82.4%	84.1%	86.5%	86.6%
■ Plan to in future	9.2%	9.0%	7.0%	7.1%
■ Other Property Type	2.1%	1.7%	1.4%	1.7%
■ Timeshare	6.3%	5.3%	5.0%	4.6%

# SECTION – EUROPE

# OVERALL SATISFACTION – MOST RECENT VISIT – EUROPE

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	87.7%	78.7%	86.7%	69.0%	78.9%	82.6%	88.8%
■ Above Average (5-6)	11.2%	18.4%	11.7%	23.8%	13.1%	15.1%	11.0%
■ Below Average (3-4)	1.0%	2.6%	1.5%	3.6%	5.3%	1.9%	0.2%
■ Poor (1-2)	0.2%	0.3%	0.1%	3.6%	2.8%	0.3%	0.0%
BASE	1,779	1,207	798	29	37	574	440
▲ MEAN	7.45	7.16	7.42	6.82	7.05	7.27	7.50

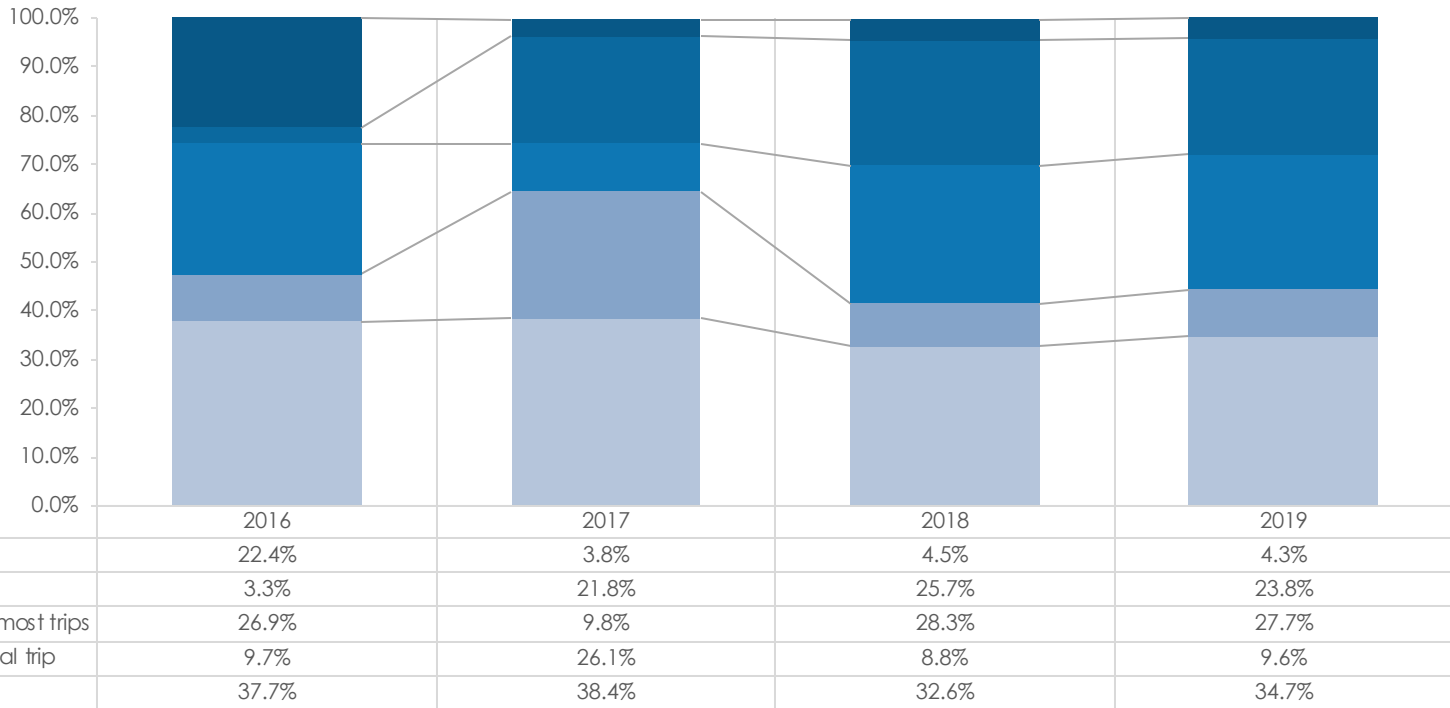
# PRIMARY TRIP PURPOSE EUROPE

	2018	2019
Vacation	66.6%	67.2%
Honeymoon	8.3%	8.2%
Anniversary/ birthday	5.7%	6.3%
Visit friends/ relatives	4.2%	4.6%
Sporting event	1.3%	1.8%
Convention, conference, seminar	3.4%	1.7%
Family gathering	1.2%	1.6%

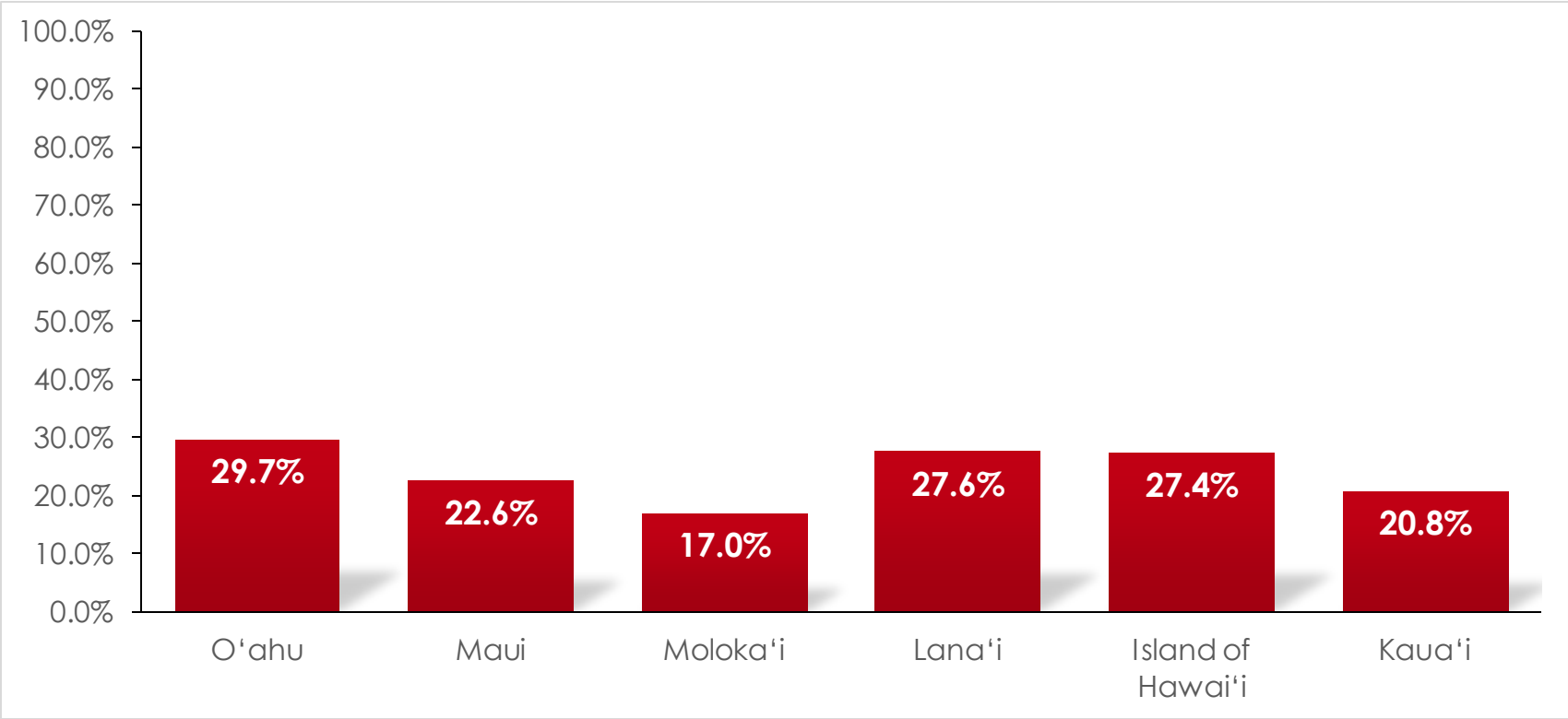
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE EUROPE

	2018	2019
Vacation	86.5%	87.9%
Anniversary/ birthday	12.4%	13.2%
Honeymoon	9.8%	9.2%
Visit friends/ relatives	8.7%	8.7%
Family gathering/ reunion	3.5%	3.3%
Sporting event	2.2%	2.6%
Convention, conference, seminar	4.1%	2.2%
Business trip	2.2%	1.8%
Shopping/ fashion	2.0%	1.7%

# VACATION TRIP DESCRIPTION – EUROPE

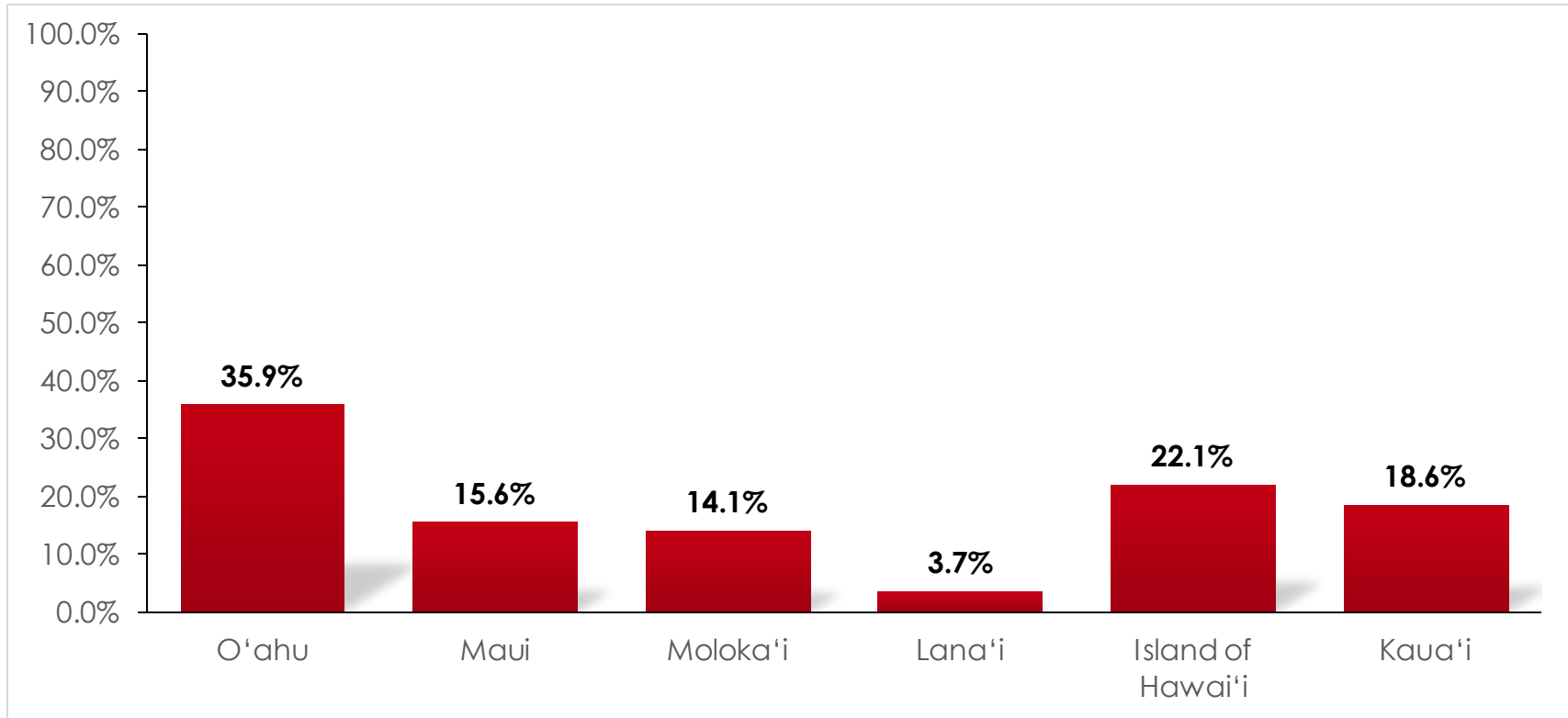


# ADVERTISING AWARENESS – EUROPE

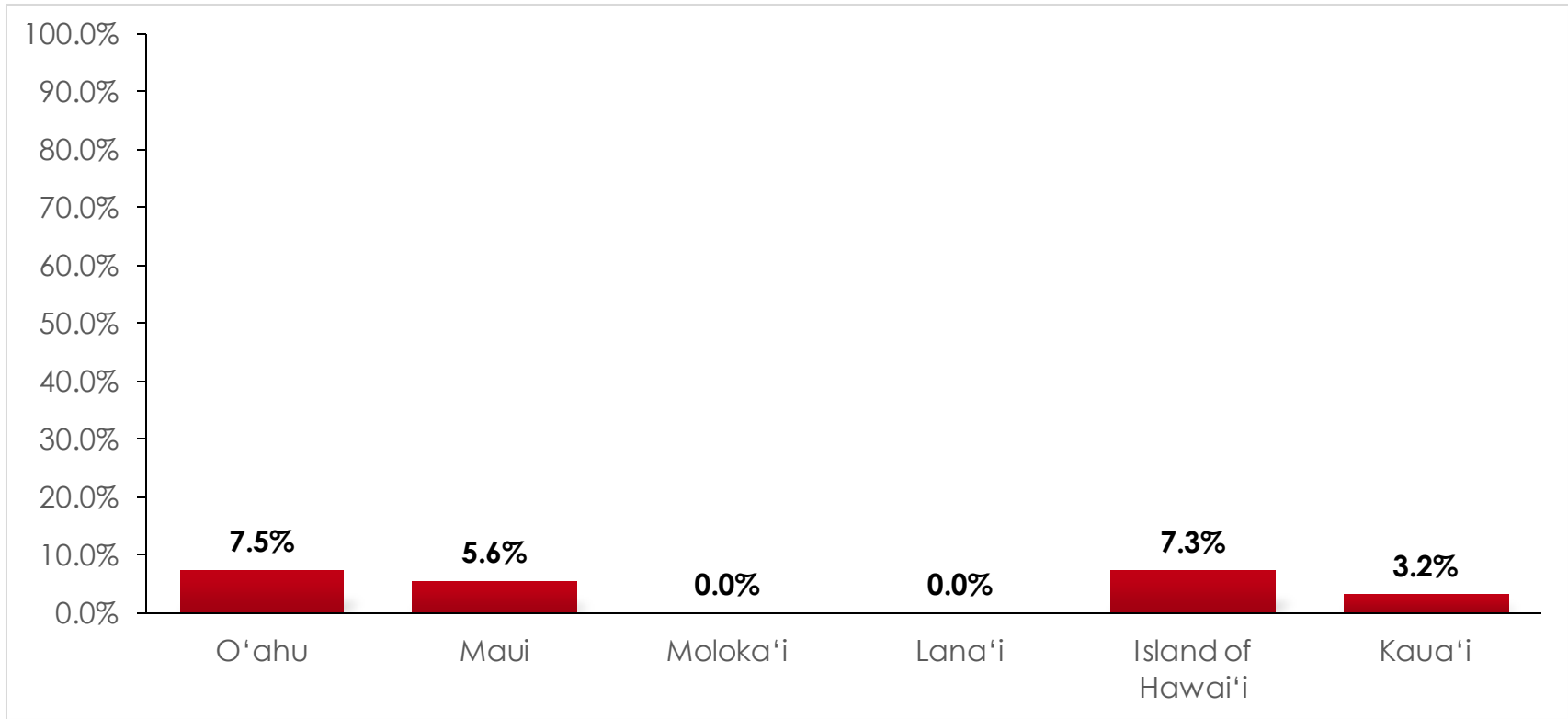




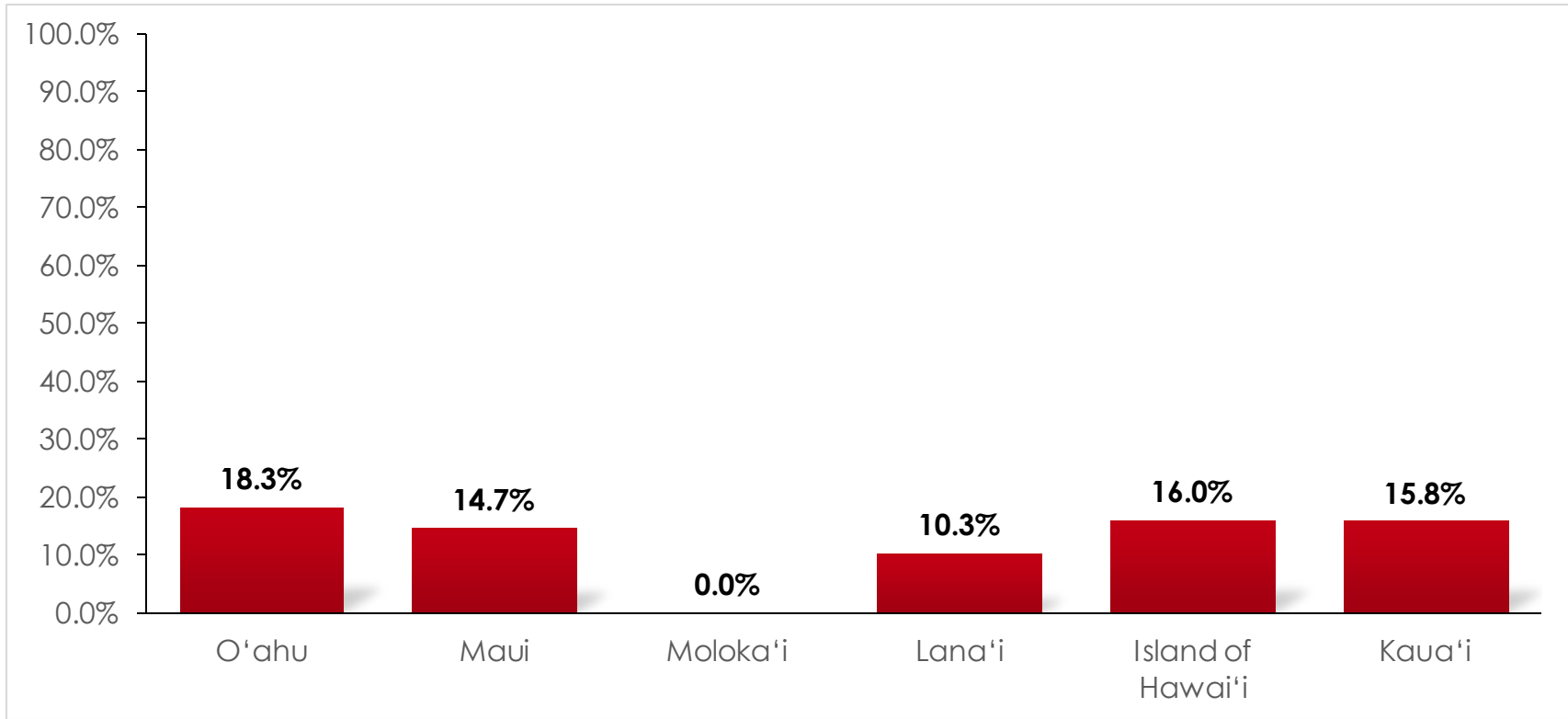
# IMPACT OF LOCATION FILMING – EUROPE



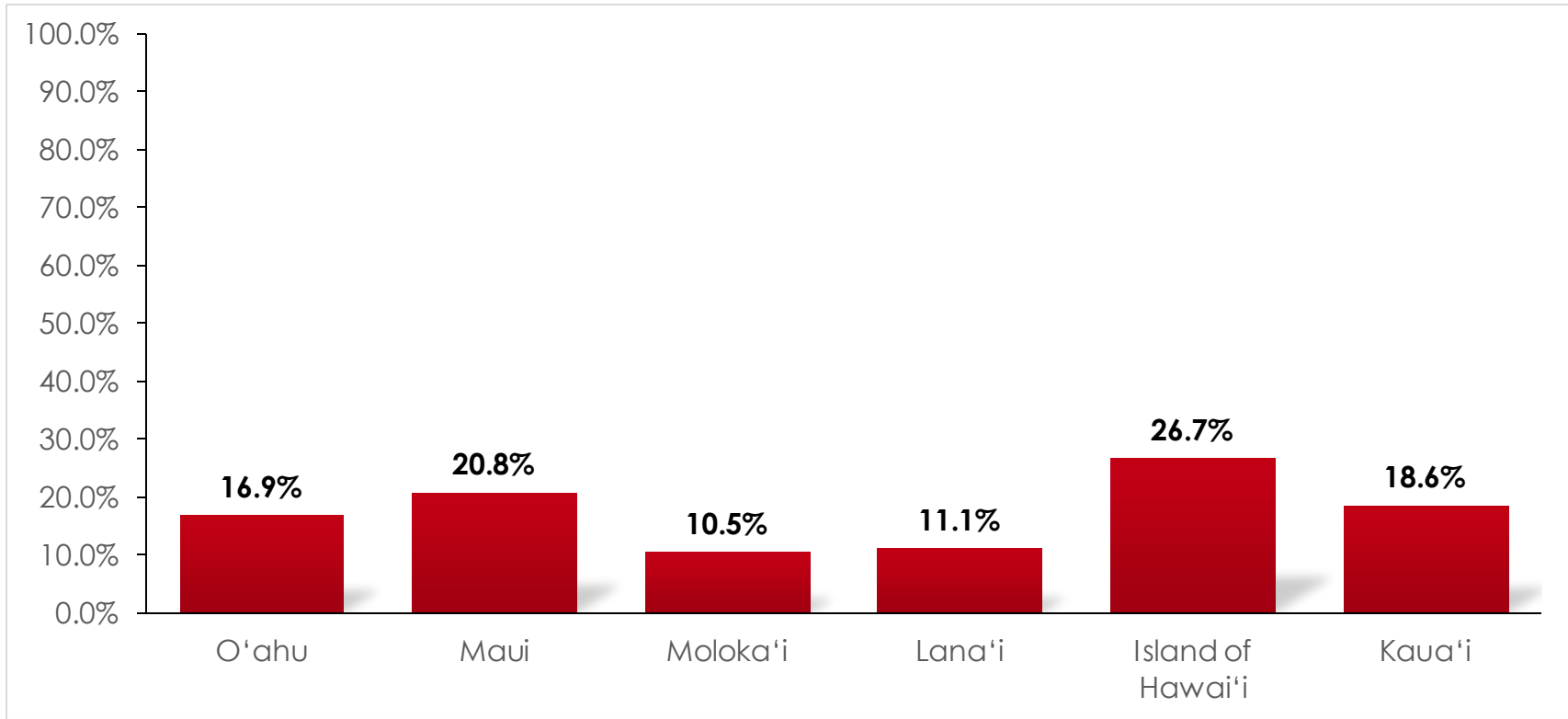
# IMPACT OF HAWAIIAN MUSIC – EUROPE



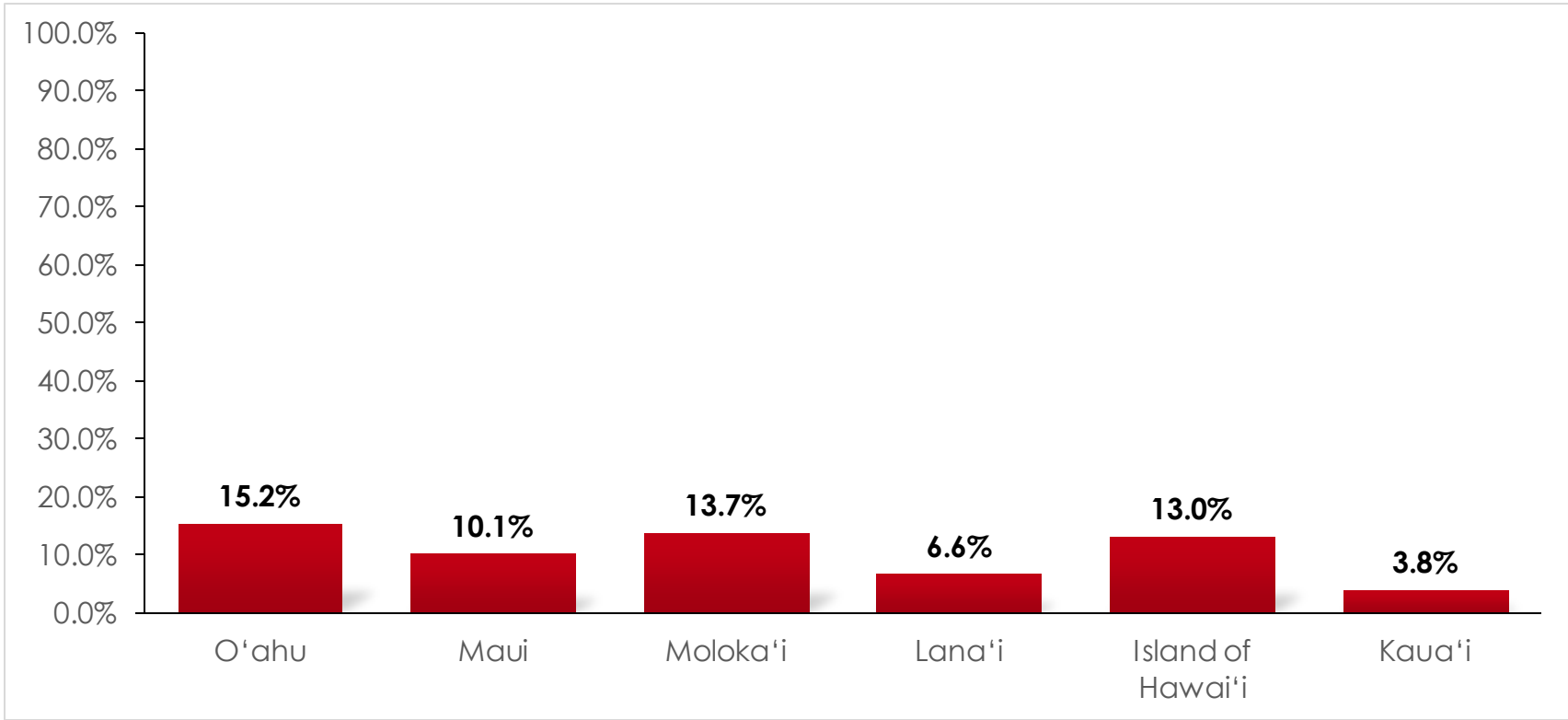
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS– EUROPE



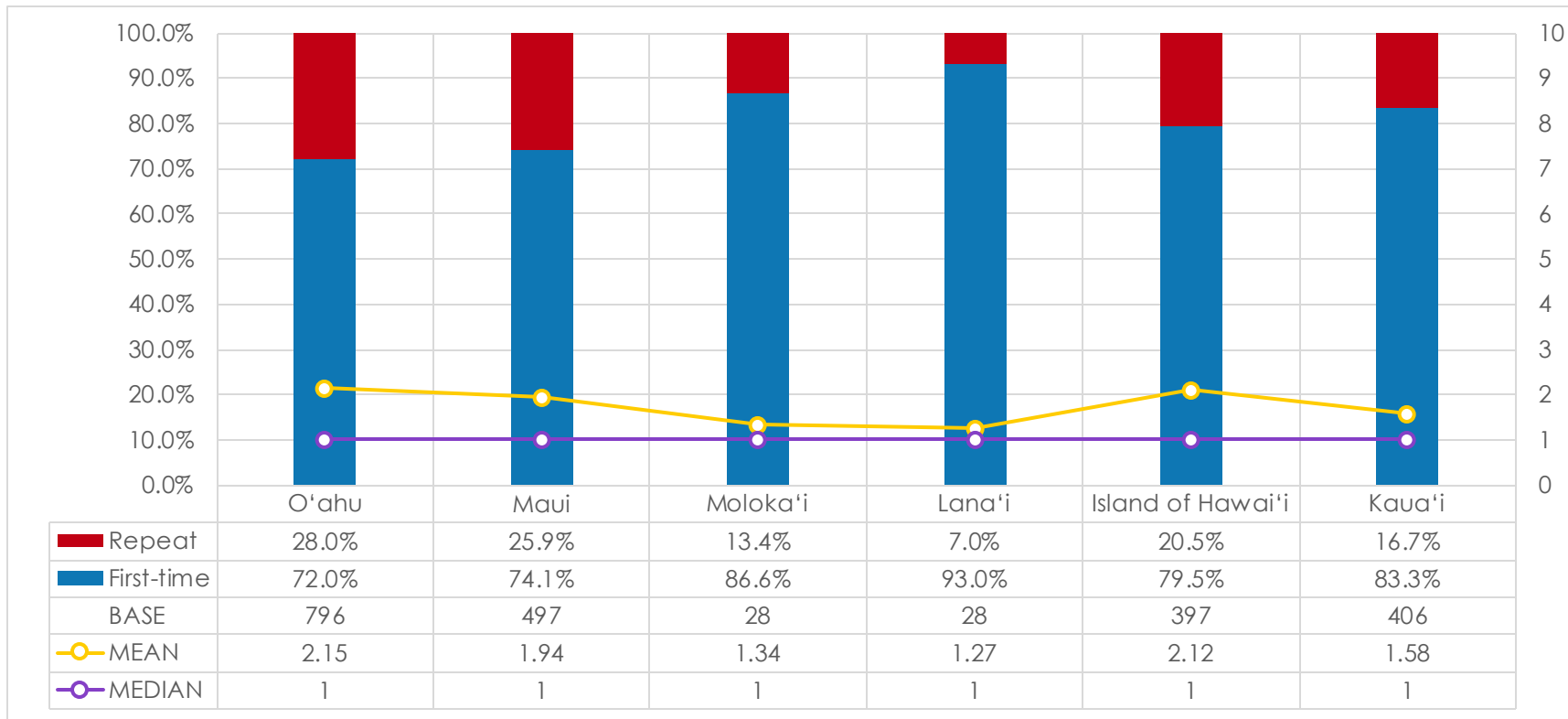
# IMPACT OF OUTDOOR/ SPORTING EVENTS– EUROPE



# IMPACT OF HAWAIIAN CULTURAL EVENTS – EUROPE



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – EUROPE

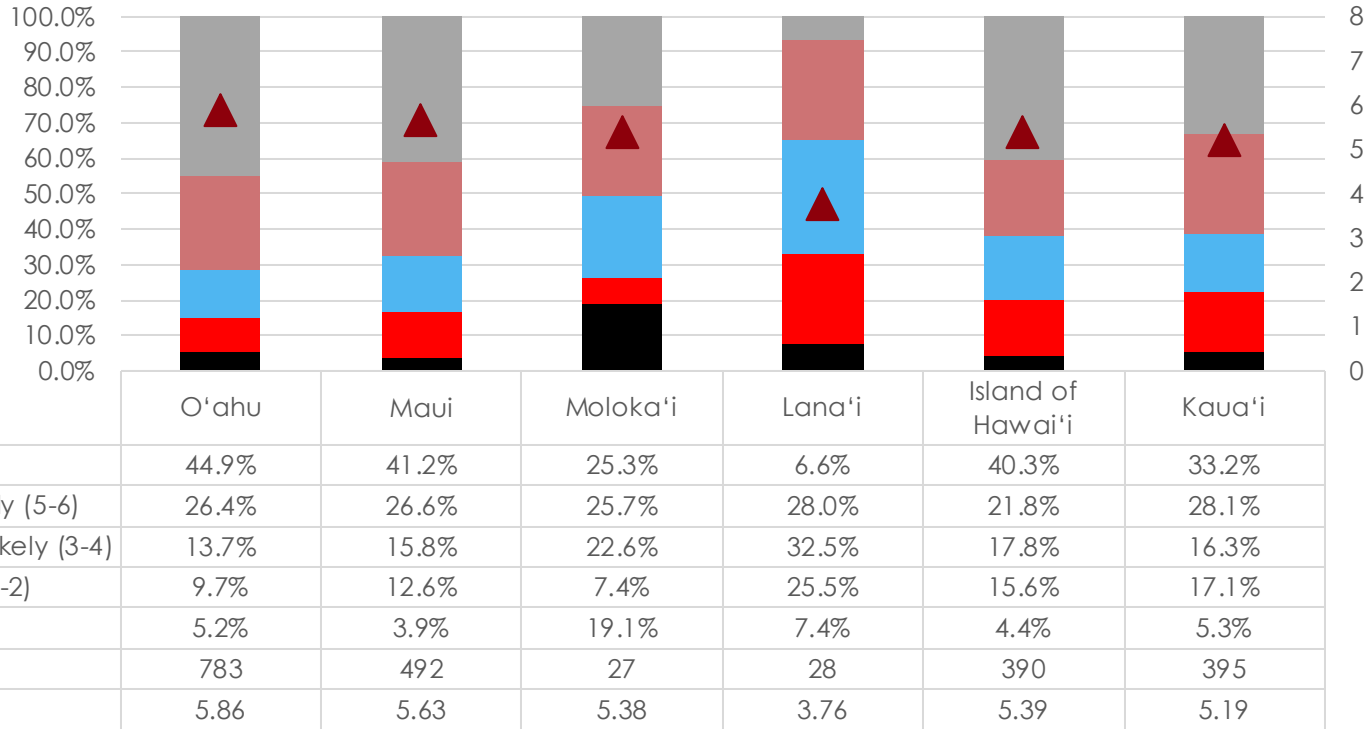


# TRAVEL PARTY MEMBERS – EUROPE

	2016	2017	2018	2019
<b>Spouse</b>	55.5%	52.8%	51.4%	50.7%
<b>Other adult family</b>	14.7%	16.7%	17.1%	19.3%
<b>Child under 18</b>	12.8%	11.6%	14.1%	14.7%
<b>Friends/ associates</b>	15.3%	15.5%	14.1%	15.7%
<b>Alone</b>	13.8%	13.4%	13.4%	11.8%
<b>Girlfriend/ boyfriend</b>	11.5%	11.1%	12.0%	13.8%
<b>Same-sex partner</b>	.6%	1.6%	1.7%	1.5%

# LIKELIHOOD OF RETURN VISIT – EUROPE

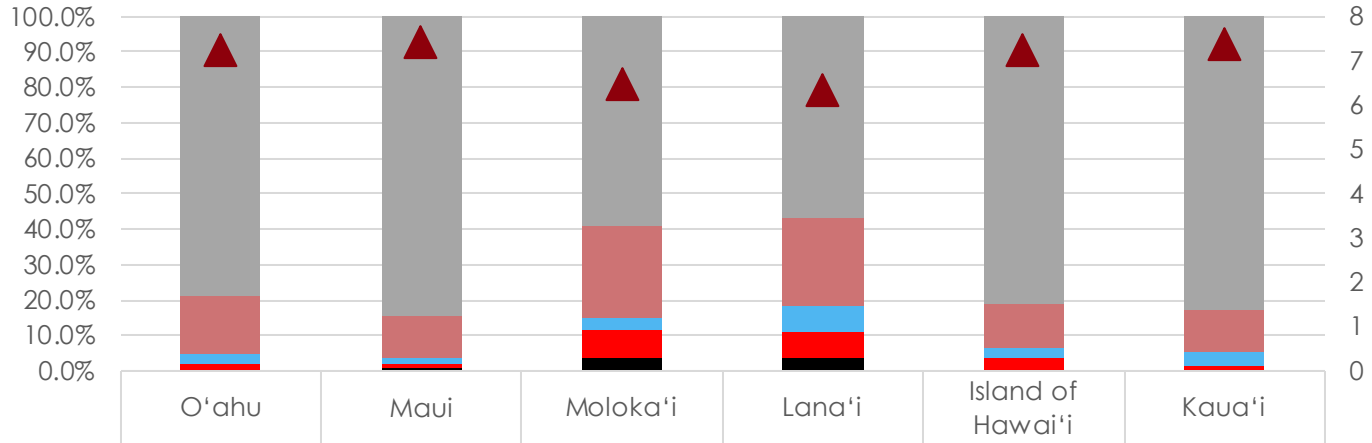
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely





# BRAND/DESTINATION ADVOCACY – EUROPE

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	78.9%	84.4%	59.1%	56.8%	81.2%	82.8%
■ Somewhat likely (5-6)	16.4%	11.9%	26.1%	25.1%	12.5%	11.8%
■ Somewhat unlikely (3-4)	2.8%	2.0%	3.5%	7.0%	2.6%	4.1%
■ Very unlikely (1-2)	1.8%	1.1%	7.4%	7.4%	3.1%	0.8%
■ Not sure	0.1%	0.6%	3.9%	3.7%	0.5%	0.5%
BASE	774	491	27	28	386	392
▲ MEAN	7.21	7.42	6.46	6.32	7.22	7.36

## ACTIVITIES – SIGHTSEEING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	94.9%	95.2%	96.1%	96.7%	95.7%	97.7%
<b>On own (self-guided)</b>	60.3%	75.6%	65.3%	32.5%	80.5%	81.9%
<b>Helicopter/ airplane</b>	5.7%	7.5%	3.9%	0.0%	12.5%	31.6%
<b>Boat/ submarine/ whale</b>	15.8%	32.3%	3.5%	24.7%	23.5%	30.4%
<b>Visit towns</b>	38.8%	46.2%	33.5%	28.0%	43.5%	42.0%
<b>Limo/ van/ bus tour</b>	25.7%	10.0%	7.8%	32.1%	11.8%	6.8%
<b>Scenic views/ natural landmark</b>	55.1%	55.8%	47.4%	28.0%	67.0%	74.3%
<b>Movie/ TV/ film location</b>	13.1%	1.7%	7.4%	0.0%	1.3%	3.4%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - EUROPE

	2017	2018	2019
<b>TOTAL</b>	98.0%	95.7%	96.0%
<b>On own (self-guided)</b>	75.5%	72.3%	73.2%
<b>Helicopter/ airplane</b>	16.8%	15.0%	14.1%
<b>Boat/ submarine/ whale</b>	32.1%	26.6%	26.7%
<b>Visit towns</b>	26.7%	46.3%	43.9%
<b>Limo/ van/ bus tour</b>	23.1%	21.3%	17.8%
<b>Scenic views/ natural landmark</b>	75.8%	64.4%	62.6%
<b>Movie/ TV/ film location</b>	9.9%	7.8%	7.5%

# ACTIVITIES – RECREATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.2%	97.6%	88.3%	75.7%	96.6%	95.2%
<b>Beach/ sunbathing</b>	86.2%	88.0%	66.5%	60.9%	77.3%	78.2%
<b>Bodyboard/ Standup paddle board</b>	12.5%	11.4%	0.0%	3.7%	12.0%	6.5%
<b>Surfing</b>	12.8%	14.4%	3.9%	0.0%	6.5%	8.0%
<b>Canoeing/ kayak</b>	5.5%	3.7%	11.3%	0.0%	6.0%	9.3%
<b>Swim- ocean</b>	69.1%	72.4%	36.6%	28.4%	71.3%	63.5%
<b>Snorkel</b>	34.7%	53.9%	25.7%	32.1%	52.3%	42.0%
<b>Windsurf/ Kitesurf</b>	0.5%	3.2%	0.0%	0.0%	0.5%	0.2%
<b>Jet ski/ Parasail</b>	0.7%	1.1%	0.0%	0.0%	1.0%	0.5%
<b>Scuba</b>	2.7%	4.7%	3.9%	0.0%	4.4%	2.3%
<b>Fishing</b>	1.2%	0.4%	0.0%	0.0%	1.3%	0.0%
<b>Golf</b>	1.5%	3.6%	3.5%	0.0%	2.8%	3.2%

# STATEWIDE - ACTIVITIES – RECREATION – EUROPE

	2017	2018	2019
<b>TOTAL</b>	97.5%	96.5%	96.9%
<b>Beach/ sunbathing</b>	88.5%	86.3%	85.2%
<b>Bodyboard/ Standup paddle board</b>	15.5%	12.5%	12.7%
<b>Surfing</b>	12.9%	12.1%	12.3%
<b>Canoeing/ kayak</b>	7.1%	7.9%	6.9%
<b>Swim- ocean</b>	NA	69.5%	72.0%
<b>Snorkel</b>	NA	43.8%	47.1%
<b>Windsurf/ Kitesurf</b>	1.5%	1.1%	1.2%
<b>Jet ski/ Parasail</b>	0.9%	0.7%	0.9%
<b>Scuba</b>	5.7%	3.8%	3.6%
<b>Fishing</b>	1.3%	1.3%	0.9%
<b>Golf</b>	4.4%	2.4%	3.0%

# ACTIVITIES – RECREATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.2%	97.6%	88.3%	75.7%	96.6%	95.2%
<b>Run/ Jog/ Fitness walk</b>	13.6%	16.9%	7.0%	7.0%	18.6%	14.7%
<b>Spa</b>	5.6%	6.1%	0.0%	0.0%	4.9%	5.1%
<b>Hiking</b>	43.1%	35.4%	29.2%	7.0%	55.9%	55.0%
<b>Backpack/Camp</b>	1.2%	2.3%	3.5%	0.0%	4.2%	4.6%
<b>Agritourism</b>	11.8%	4.2%	3.5%	3.3%	8.8%	3.8%
<b>Sport event/ tournament</b>	2.6%	0.4%	0.0%	0.0%	5.4%	0.0%
<b>Park/ botanical garden</b>	34.2%	31.4%	14.8%	18.1%	46.8%	36.5%
<b>Waterpark</b>	1.8%	1.3%	0.0%	3.7%	1.3%	0.5%
<b>Mountain tube/ waterfall rappel</b>	2.8%	2.0%	0.0%	0.0%	3.2%	5.1%
<b>Zip-lining</b>	1.2%	2.2%	0.0%	0.0%	2.1%	3.0%
<b>Skydiving</b>	0.8%	0.4%	0.0%	0.0%	0.5%	0.8%
<b>All terrain vehicle (ATV)</b>	1.4%	1.4%	0.0%	3.3%	3.4%	1.8%
<b>Horseback riding</b>	1.6%	1.2%	3.5%	0.0%	2.0%	1.2%

# STATEWIDE - ACTIVITIES – RECREATION – EUROPE

	2017	2018	2019
<b>TOTAL</b>	97.5%	96.5%	96.9%
<b>Run/ Jog/ Fitness walk</b>	29.4%	19.1%	17.0%
<b>Spa</b>	8.0%	5.6%	6.2%
<b>Hiking</b>	26.3%	26.9%	47.0%
<b>Backpack/Camp</b>	*	*	3.1%
<b>Agritourism</b>	8.4%	10.5%	9.2%
<b>Sport event/ tournament</b>	3.7%	2.4%	2.5%
<b>Park/ botanical garden</b>	43.3%	40.9%	39.3%
<b>Waterpark</b>	NA	3.1%	1.7%
<b>Mountain tube/ waterfall rappel</b>	NA	3.8%	3.6%
<b>Zip-lining</b>	NA	3.0%	2.3%
<b>Skydiving</b>	NA	0.8%	0.8%
<b>All terrain vehicle (ATV)</b>	NA	3.3%	2.3%
<b>Horseback riding</b>	NA	1.7%	1.8%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.6%	98.0%	88.7%	81.9%	96.4%	96.2%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	26.0%	29.8%	11.3%	28.8%	24.9%	27.2%
<b>Live music/ stage show</b>	29.0%	25.7%	18.3%	7.0%	23.0%	18.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	11.4%	5.6%	3.5%	0.0%	6.0%	3.6%
<b>Fine dining</b>	37.8%	43.8%	14.8%	17.3%	29.8%	34.2%
<b>Family restaurant</b>	48.6%	46.0%	26.1%	21.0%	49.1%	39.2%
<b>Fast food</b>	53.3%	34.1%	21.4%	3.7%	42.7%	37.9%
<b>Food truck</b>	34.3%	28.5%	7.4%	7.0%	21.3%	32.8%
<b>Café/ coffee house</b>	50.4%	49.3%	25.7%	17.7%	53.8%	46.0%
<b>Ethnic dining</b>	21.1%	19.5%	7.4%	3.3%	15.0%	15.6%
<b>Prepared own meal</b>	28.8%	36.3%	40.5%	14.8%	52.4%	39.8%



# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

	2017	2018	2019
<b>TOTAL</b>	98.5%	97.1%	97.3%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	35.7%	29.9%	29.6%
<b>Live music/ stage show</b>	31.8%	30.7%	29.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.3%	8.1%	8.3%
<b>Fine dining</b>	44.6%	40.6%	39.7%
<b>Family restaurant</b>	55.5%	48.8%	47.8%
<b>Fast food</b>	46.6%	46.4%	45.2%
<b>Food truck</b>	NA	25.9%	32.3%
<b>Café/ coffee house</b>	54.1%	53.0%	52.3%
<b>Ethnic dining</b>	21.2%	18.6%	20.7%
<b>Prepared own meal</b>	42.9%	37.6%	39.7%

## ACTIVITIES – SHOPPING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.8%	96.6%	84.8%	53.5%	95.2%	94.3%
<b>Mall/ department store</b>	67.6%	51.1%	0.0%	11.1%	44.0%	32.4%
<b>Designer boutique</b>	16.6%	13.4%	0.0%	0.0%	8.8%	7.2%
<b>Hotel/ resort store</b>	31.8%	26.3%	0.0%	3.3%	22.1%	13.2%
<b>Swap meet/ flea market</b>	7.5%	3.2%	0.0%	0.0%	4.9%	3.3%
<b>Discount/ outlet store</b>	19.6%	19.3%	3.9%	3.7%	12.7%	6.6%
<b>Supermarket</b>	64.2%	67.3%	50.9%	14.4%	74.4%	70.9%
<b>Farmer's market</b>	21.4%	23.0%	25.7%	7.0%	41.3%	31.3%
<b>Convenience store</b>	43.5%	26.8%	14.8%	21.4%	29.4%	25.6%
<b>Duty free store</b>	7.6%	5.3%	0.0%	3.7%	4.9%	0.5%
<b>Local shop/ artisan</b>	53.2%	60.6%	39.6%	24.3%	54.0%	63.0%

# STATEWIDE - ACTIVITIES – SHOPPING – EUROPE

	2017	2018	2019
<b>TOTAL</b>	96.7%	95.6%	95.9%
<b>Mall/ department store</b>	63.5%	58.6%	55.5%
<b>Designer boutique</b>	19.6%	17.7%	14.2%
<b>Hotel/ resort store</b>	29.0%	30.7%	27.0%
<b>Swap meet/ flea market</b>	11.9%	6.7%	6.0%
<b>Discount/ outlet store</b>	24.5%	20.0%	17.9%
<b>Supermarket</b>	64.1%	70.2%	69.5%
<b>Farmer's market</b>	29.9%	28.9%	30.5%
<b>Convenience store</b>	33.4%	36.0%	35.6%
<b>Duty free store</b>	6.4%	6.9%	6.0%
<b>Local shop/ artisan</b>	62.8%	59.1%	58.9%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	81.4%	57.6%	43.9%	53.1%	65.5%	48.9%
<b>Historic military site</b>	57.4%	4.4%	7.4%	10.7%	15.4%	4.6%
<b>Other historical site</b>	25.0%	20.5%	25.3%	11.1%	38.6%	22.1%
<b>Museum/ art gallery</b>	16.8%	12.1%	11.3%	10.3%	16.1%	8.8%
<b>Luau/ Polynesian show/ hula show</b>	32.2%	27.6%	3.9%	17.7%	21.1%	18.3%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	7.1%	7.1%	0.0%	10.7%	6.8%	3.3%
<b>Play/ concert/ theatre</b>	4.4%	2.6%	3.9%	0.0%	2.3%	1.2%
<b>Art/ craft fair</b>	5.0%	7.0%	0.0%	0.0%	6.7%	7.6%
<b>Festival event</b>	4.4%	2.1%	0.0%	6.6%	5.2%	2.6%

## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

	2017	2018	2019
<b>TOTAL</b>	77.3%	74.8%	71.1%
<b>Historic military site</b>	43.2%	33.2%	30.3%
<b>Other historical site</b>	34.1%	29.5%	28.5%
<b>Museum/ art gallery</b>	19.2%	15.5%	16.0%
<b>Luau/ Polynesian show/ hula show</b>	36.2%	34.2%	30.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	5.7%	8.1%	7.4%
<b>Play/ concert/ theatre</b>	4.8%	5.5%	3.6%
<b>Art/ craft fair</b>	7.6%	9.0%	7.1%
<b>Festival event</b>	8.1%	4.7%	4.4%

# ACTIVITIES – TRANSPORTATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.0%	96.9%	88.7%	71.6%	94.2%	96.0%
<b>Airport shuttle</b>	25.5%	16.1%	3.5%	10.7%	19.8%	11.1%
<b>Trolley</b>	9.0%	2.4%	0.0%	0.0%	3.9%	0.8%
<b>Public bus</b>	27.1%	6.5%	7.4%	0.0%	9.1%	3.9%
<b>Tour bus/ tour van</b>	25.5%	10.3%	11.7%	29.2%	11.1%	9.8%
<b>Taxi/ limo</b>	31.1%	13.9%	11.7%	25.1%	14.8%	6.7%
<b>Rental car</b>	43.9%	74.6%	57.5%	14.0%	77.0%	82.2%
<b>Ride share</b>	25.9%	13.9%	3.9%	0.0%	12.3%	5.1%
<b>Bicycle rental</b>	3.0%	2.0%	0.0%	0.0%	2.8%	3.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – EUROPE

	2017	2018	2019
<b>TOTAL</b>	98.0%	94.4%	95.2%
<b>Airport shuttle</b>	31.7%	26.8%	21.4%
<b>Trolley</b>	7.8%	7.2%	5.5%
<b>Public bus</b>	19.8%	18.7%	15.7%
<b>Tour bus/ tour van</b>	18.2%	20.3%	18.0%
<b>Taxi/ limo</b>	31.6%	25.9%	21.8%
<b>Rental car</b>	66.5%	62.4%	64.8%
<b>Ride share</b>	NA	11.9%	17.6%
<b>Bicycle rental</b>	NA	3.3%	3.2%

## ACTIVITIES – OTHER – EUROPE

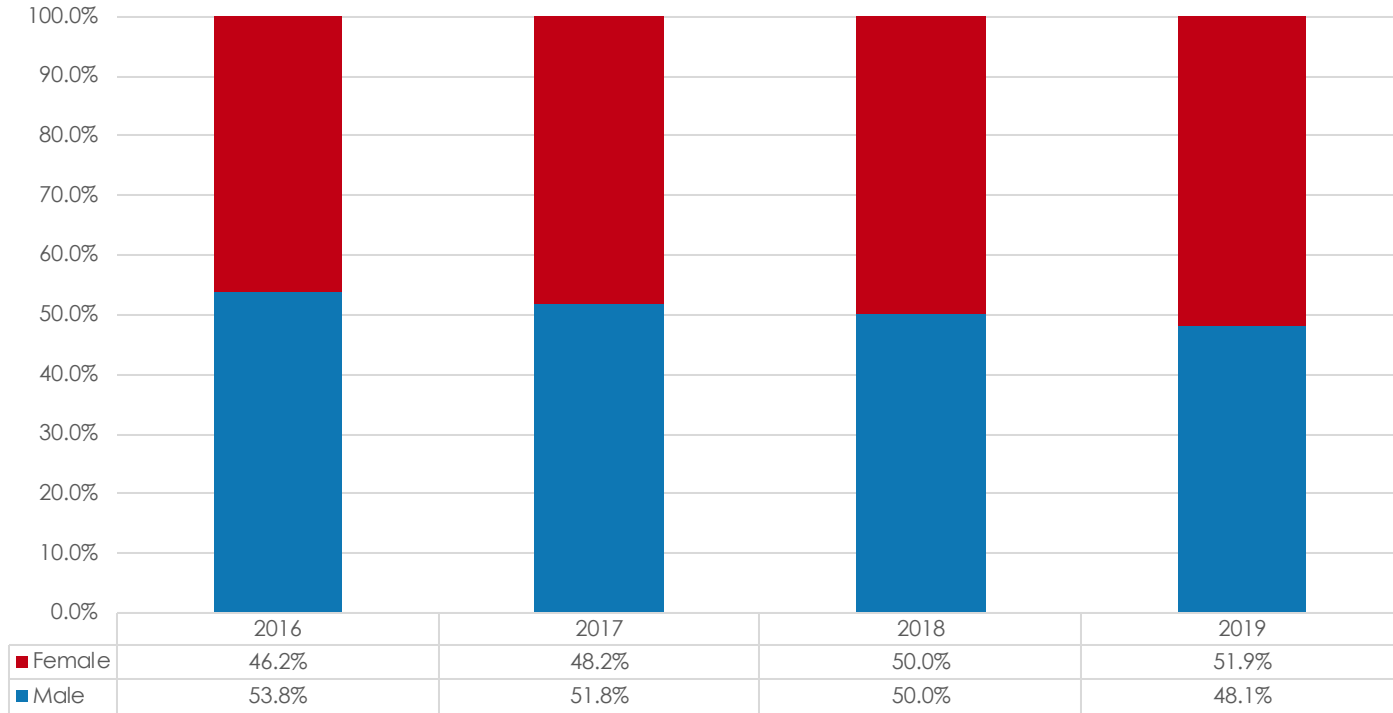
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	16.9%	10.1%	18.7%	10.7%	12.7%	6.9%
Visit friends/ family	14.9%	9.1%	14.8%	0.0%	10.6%	6.4%
Volunteer- non-profit	2.0%	1.2%	3.9%	10.7%	2.3%	0.5%



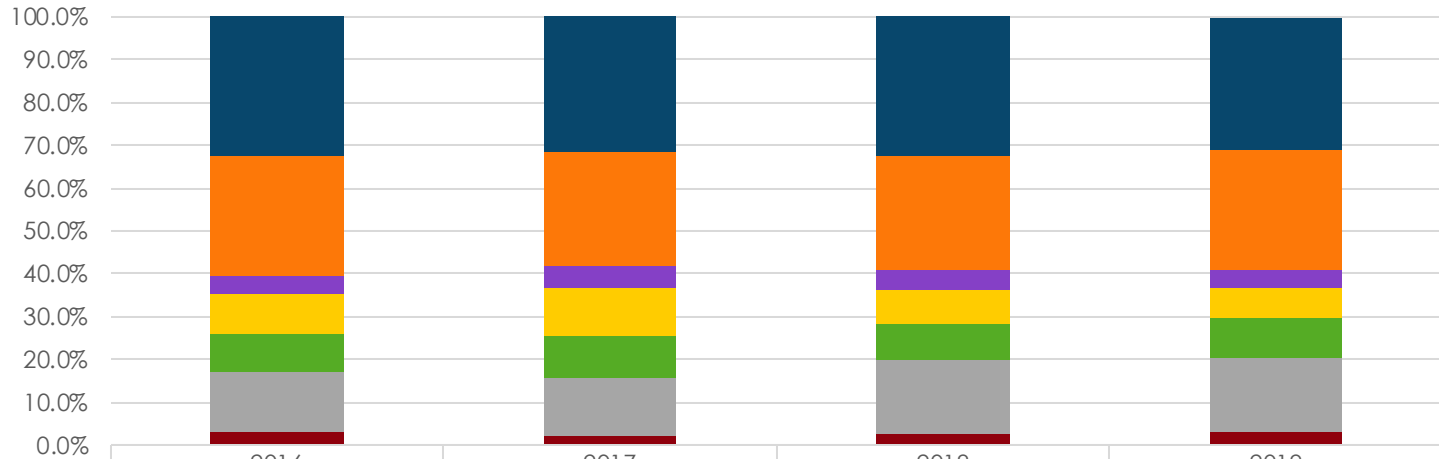
## ACTIVITIES – OTHER – EUROPE

	2018	2019
<b>TOTAL</b>	15.5%	14.9%
<b>Visit friends/ family</b>	13.4%	12.9%
<b>Volunteer- non-profit</b>	2.3%	2.1%

# VISITOR PROFILE – GENDER – EUROPE

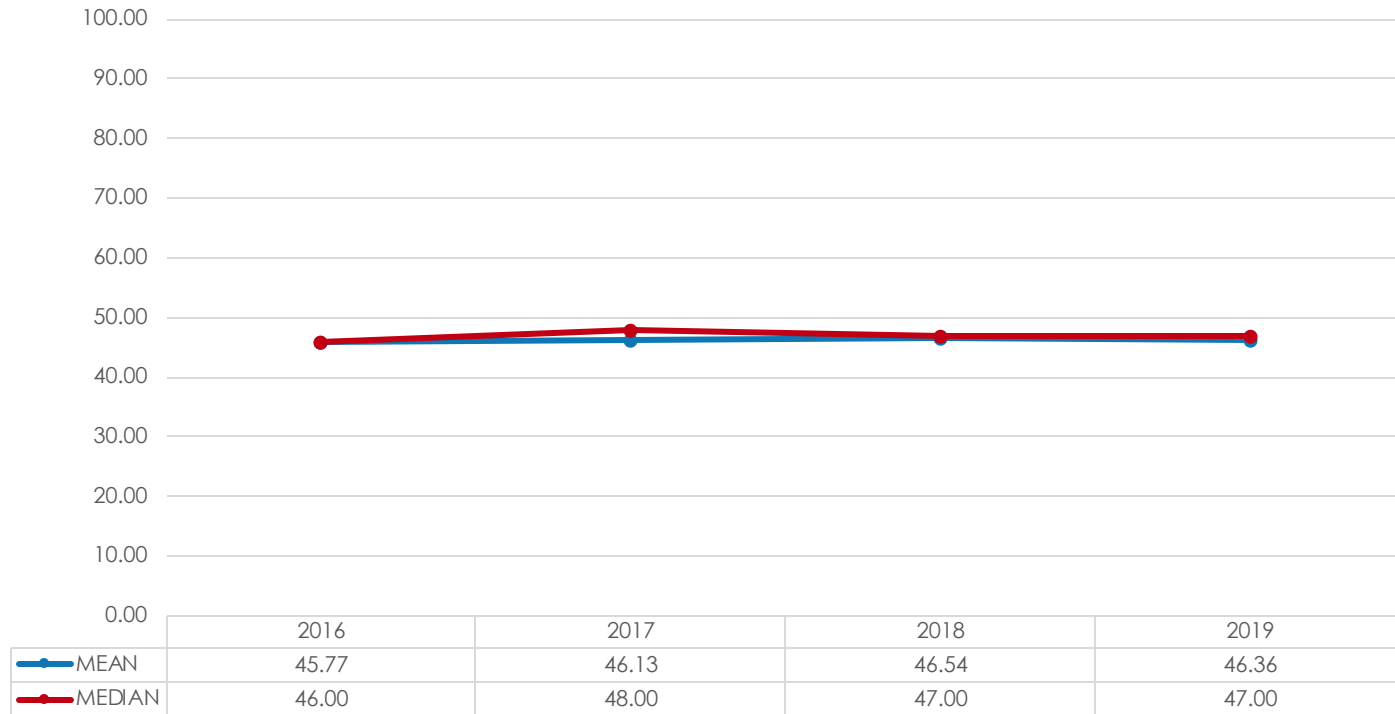


# VISITOR PROFILE – EDUCATION – EUROPE

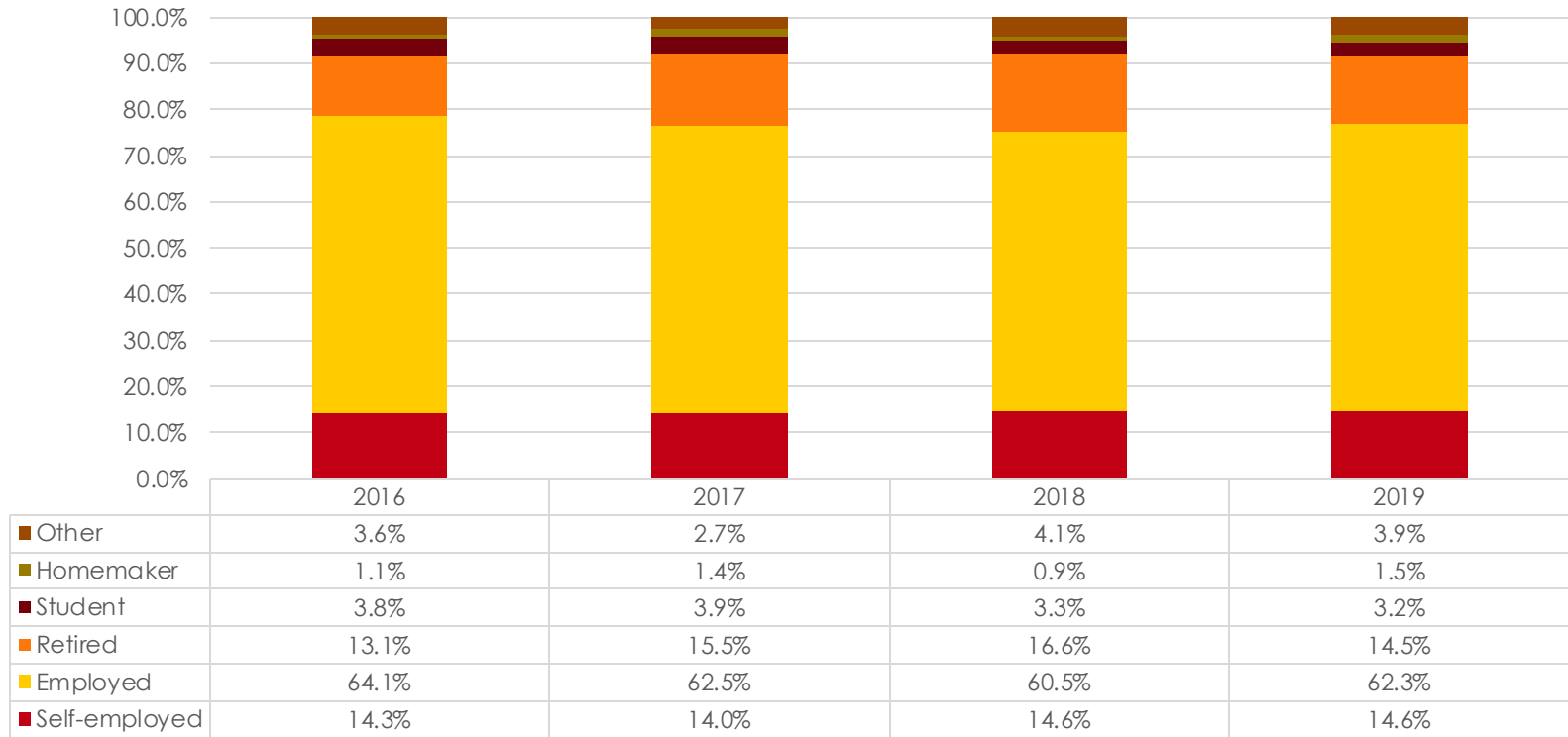


	2016	2017	2018	2019
■ Post-Graduate	32.8%	31.7%	32.5%	31.1%
■ College Grad	27.9%	26.5%	26.7%	27.8%
■ Associate Degree	4.2%	5.4%	4.7%	4.4%
■ Vocational/ Tech	9.1%	11.3%	8.1%	7.1%
■ Some College	9.1%	9.5%	8.3%	9.0%
■ H.S. Grad	13.9%	13.5%	17.1%	17.6%
■ Some / No H.S.	3.1%	2.3%	2.7%	2.9%

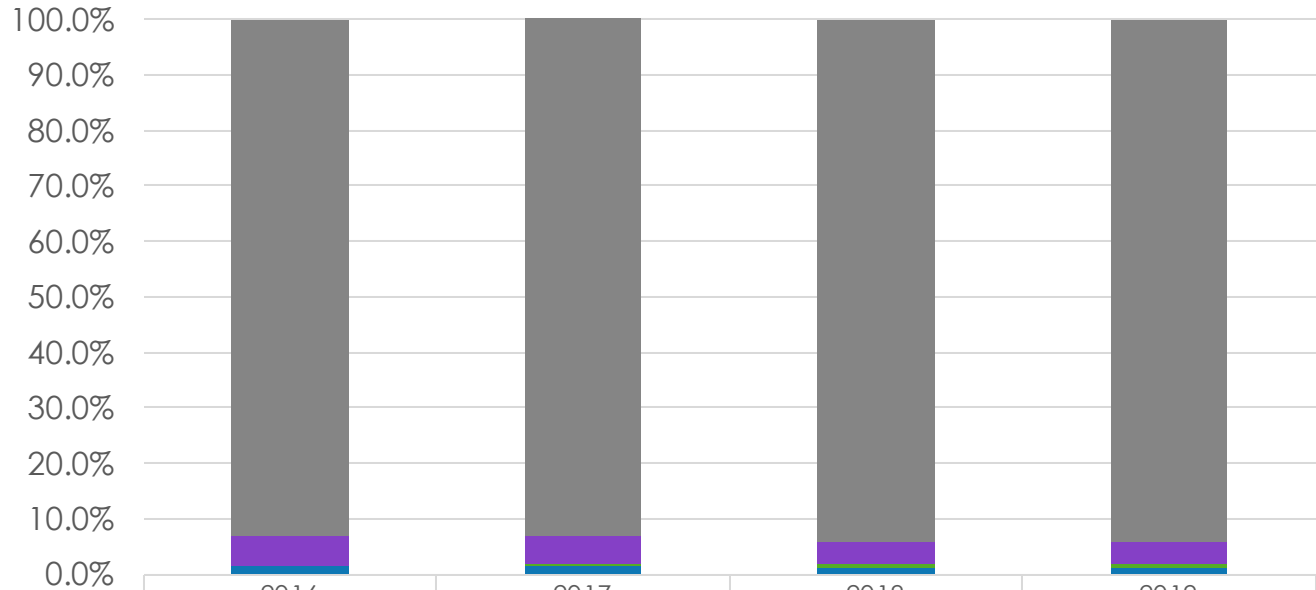
# VISITOR PROFILE – AGE – EUROPE



# VISITOR PROFILE – EMPLOYMENT STATUS – EUROPE



# VISITOR PROFILE – HAWAII PROPERTY OWNER – EUROPE

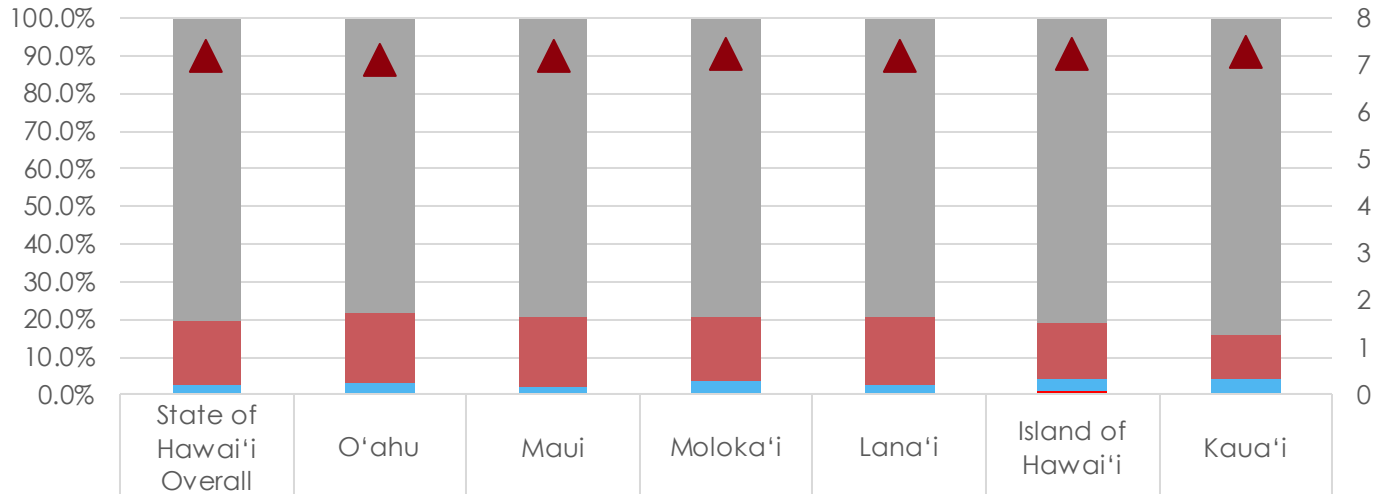


	2016	2017	2018	2019
■ Do not nor plan to purchase	93.2%	93.2%	94.1%	94.3%
■ Plan to in future	5.2%	5.0%	4.1%	3.8%
■ Other Property Type	0.3%	0.6%	0.6%	0.7%
■ Timeshare	1.3%	1.3%	1.1%	1.2%

# SECTION – OCEANIA

# OVERALL SATISFACTION – MOST RECENT VISIT – OCEANIA

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



■ Excellent (7-8)	80.4%	78.2%	79.4%	79.3%	79.5%	81.1%	84.1%
■ Above Average (5-6)	17.2%	18.6%	18.8%	17.0%	17.7%	14.5%	11.9%
■ Below Average (3-4)	2.1%	2.7%	1.5%	3.7%	2.8%	3.5%	3.6%
■ Poor (1-2)	0.3%	0.4%	0.3%	0.0%	0.0%	0.8%	0.4%
BASE	2,316	2,219	335	24	30	245	212
▲ MEAN	7.19	7.11	7.18	7.26	7.21	7.22	7.30



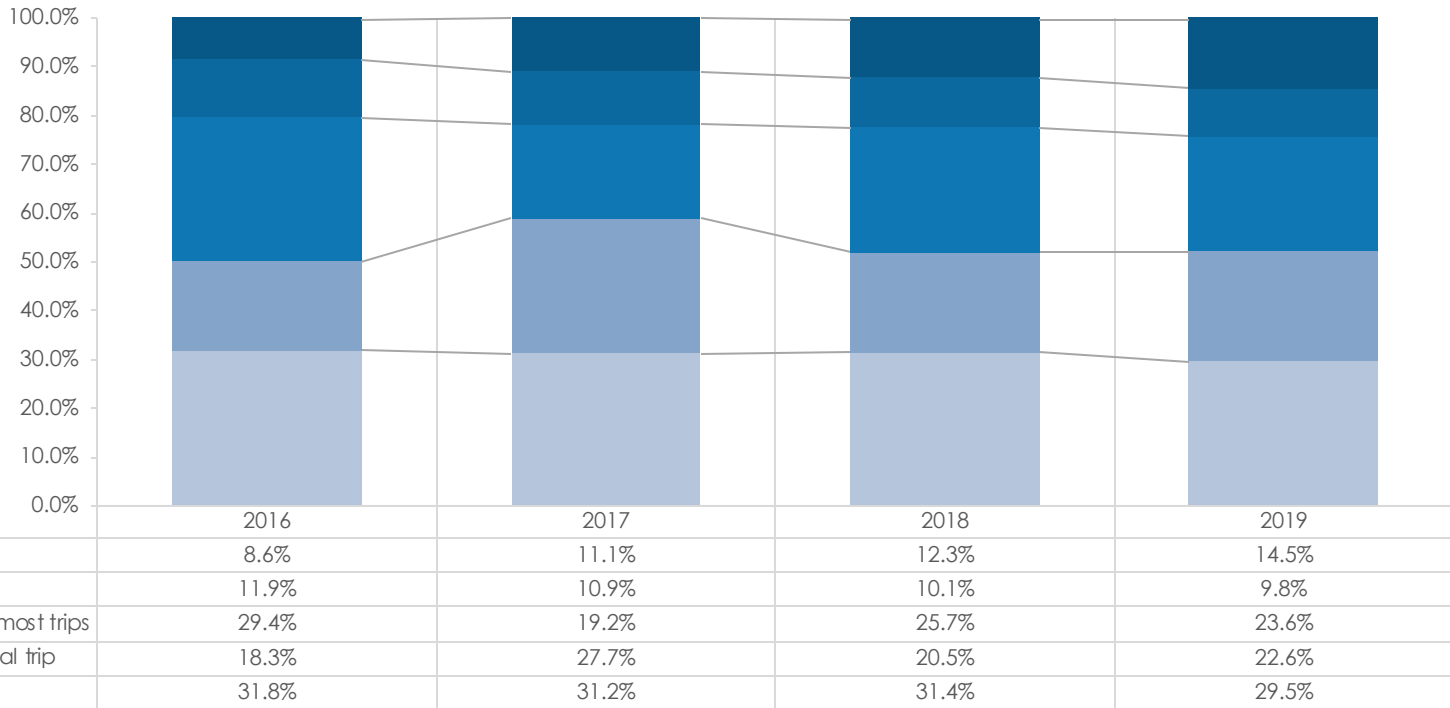
# PRIMARY TRIP PURPOSE OCEANIA

	2018	2019
Vacation	73.8%	71.8%
Layover/break up long flight	9.9%	11.9%
Anniversary/birthday	5.7%	5.1%
Visit friends or relatives	2.2%	2.0%
Honeymoon	2.4%	1.9%
Family gathering/reunion	1.2%	1.4%
Attend wedding/ vow renewal	1.1%	1.3%

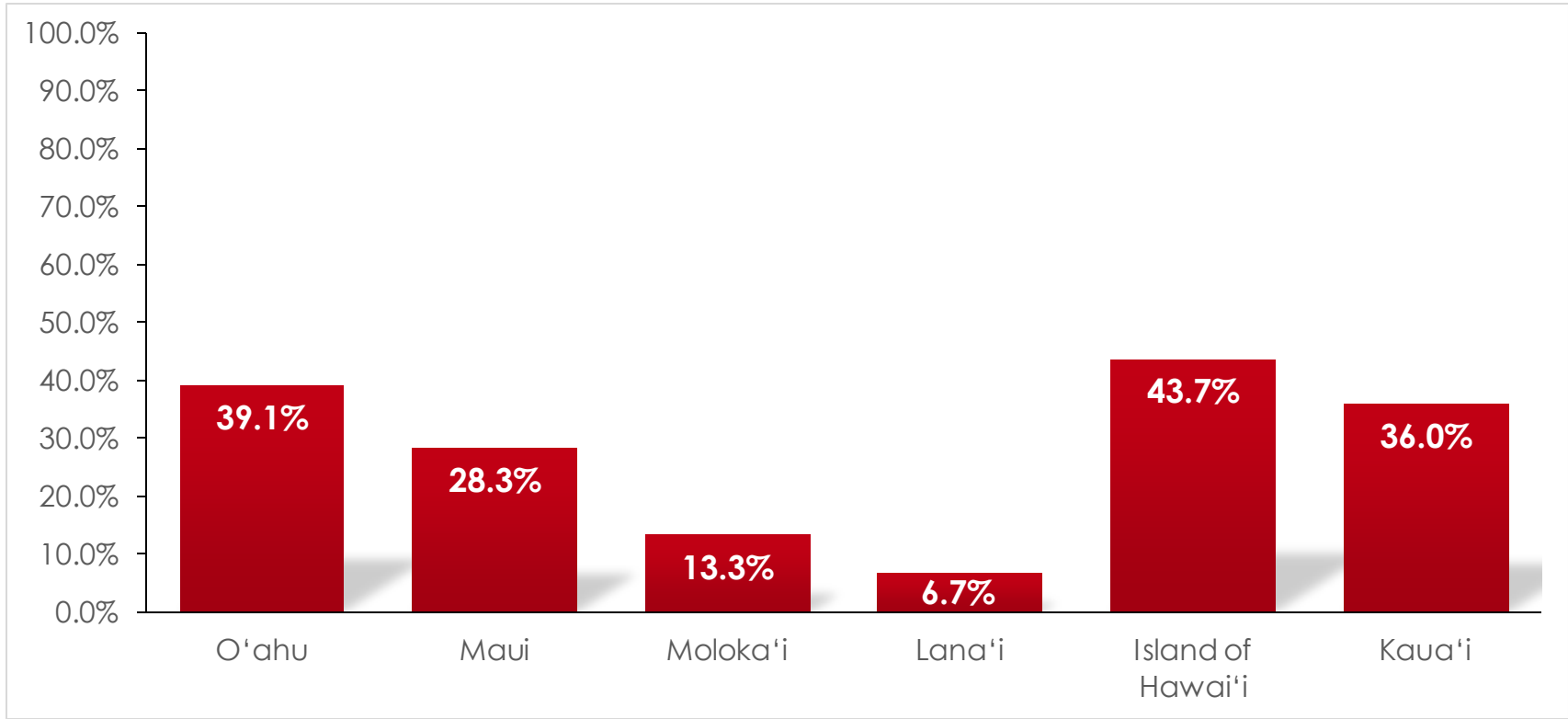
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE OCEANIA

	2018	2019
Vacation	89.8%	88.9%
Layover/ break up long trip	20.5%	22.6%
Anniversary/ birthday	12.1%	9.3%
Shopping/ fashion	9.2%	7.8%
Visit friends/ relatives	4.2%	4.1%
Family gathering/ reunion	3.0%	3.5%
Honeymoon	2.9%	2.2%

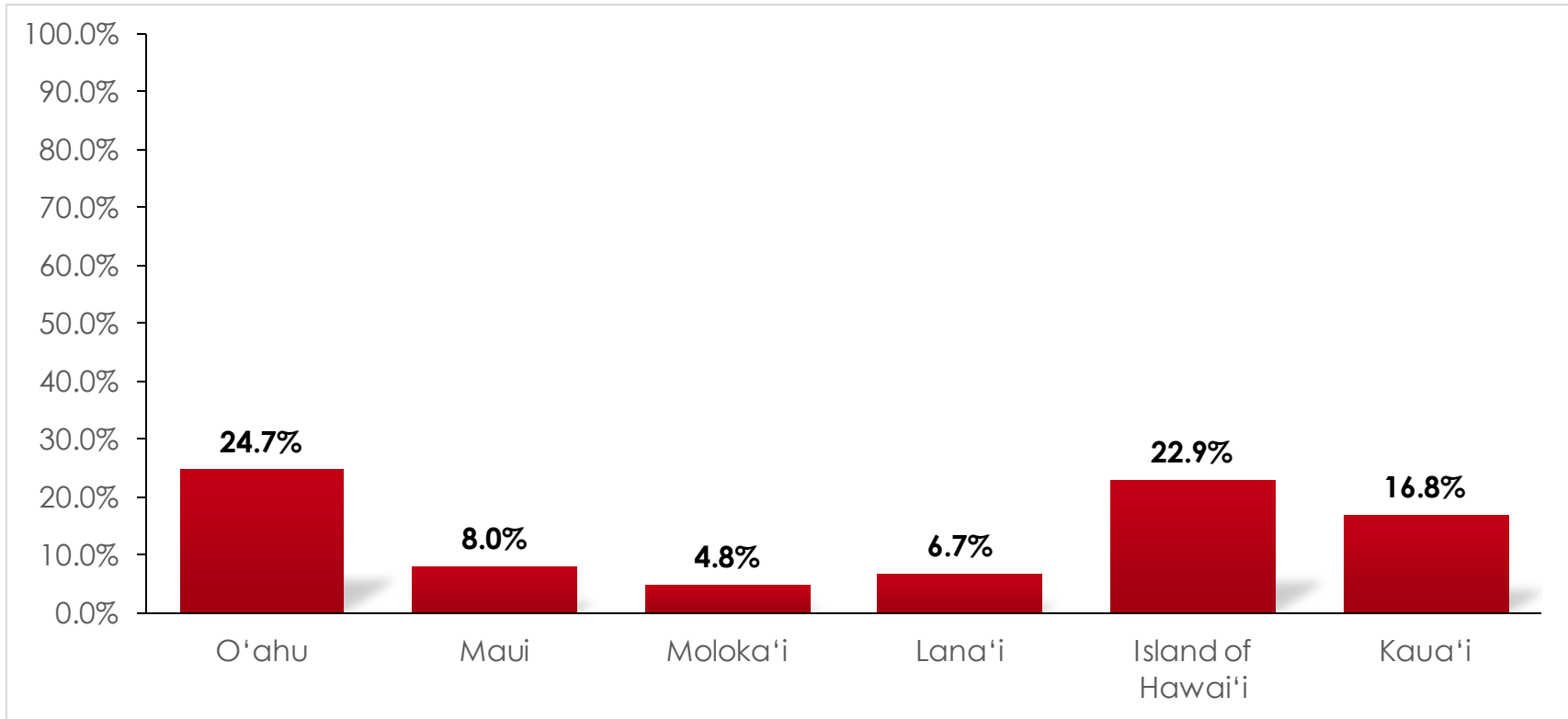
# VACATION TRIP DESCRIPTION – OCEANIA



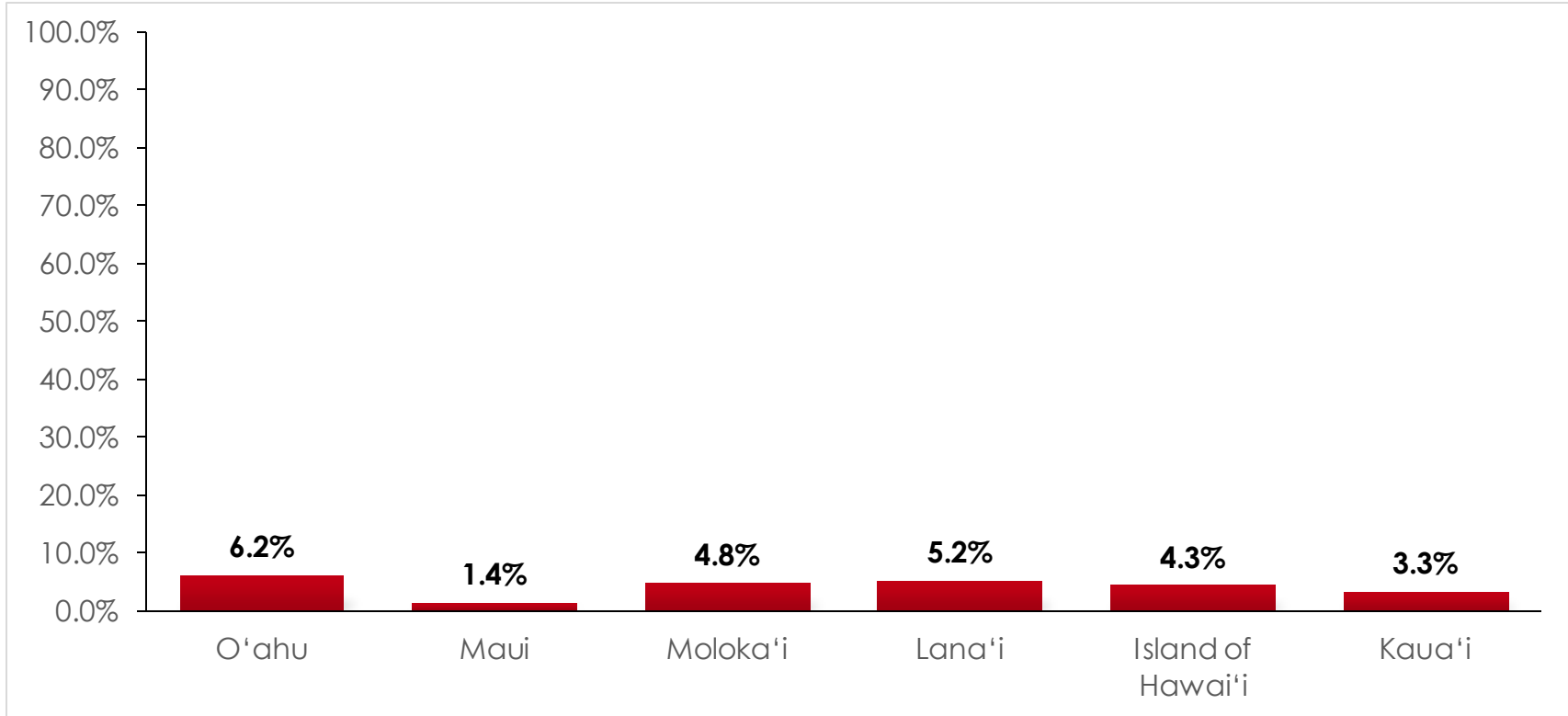
# ADVERTISING AWARENESS – OCEANIA



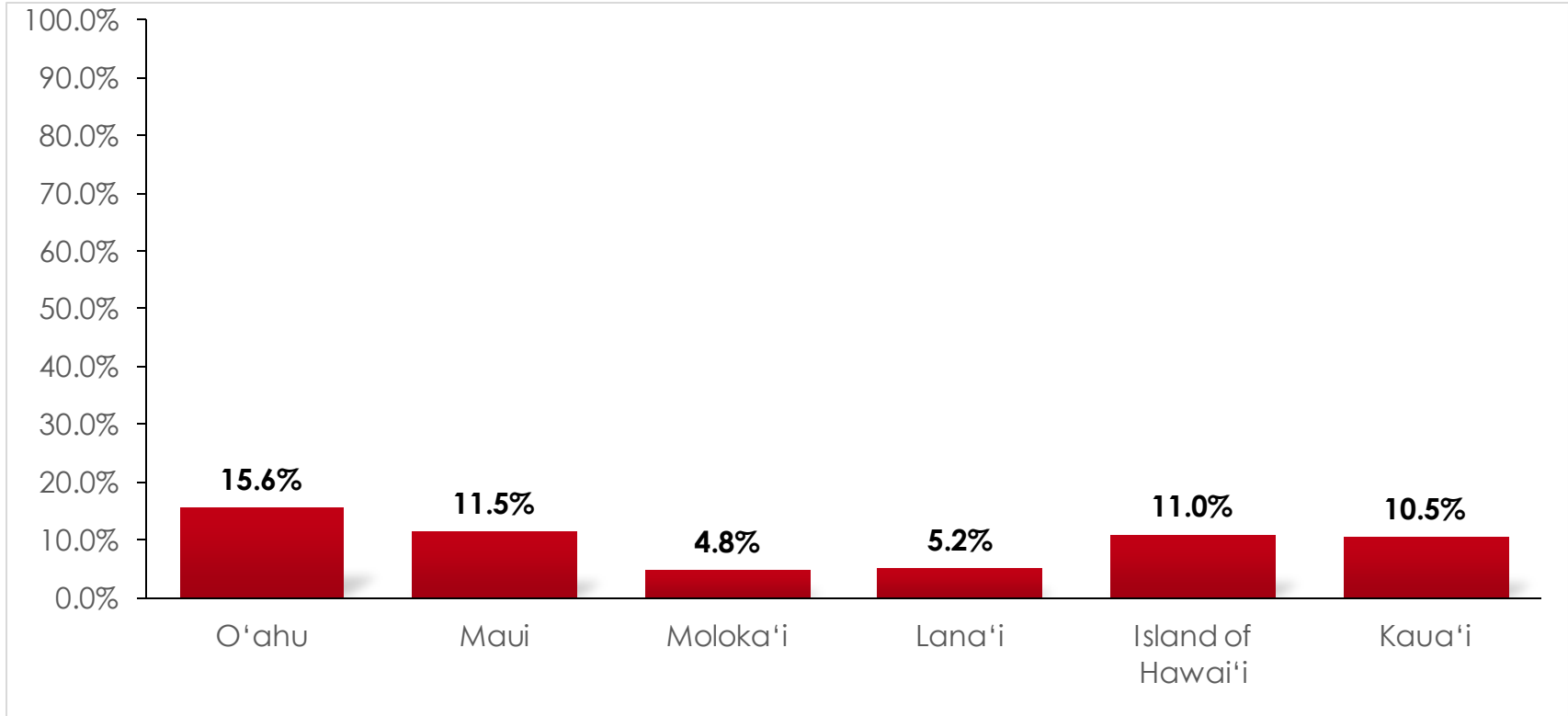
# IMPACT OF LOCATION FILMING – OCEANIA



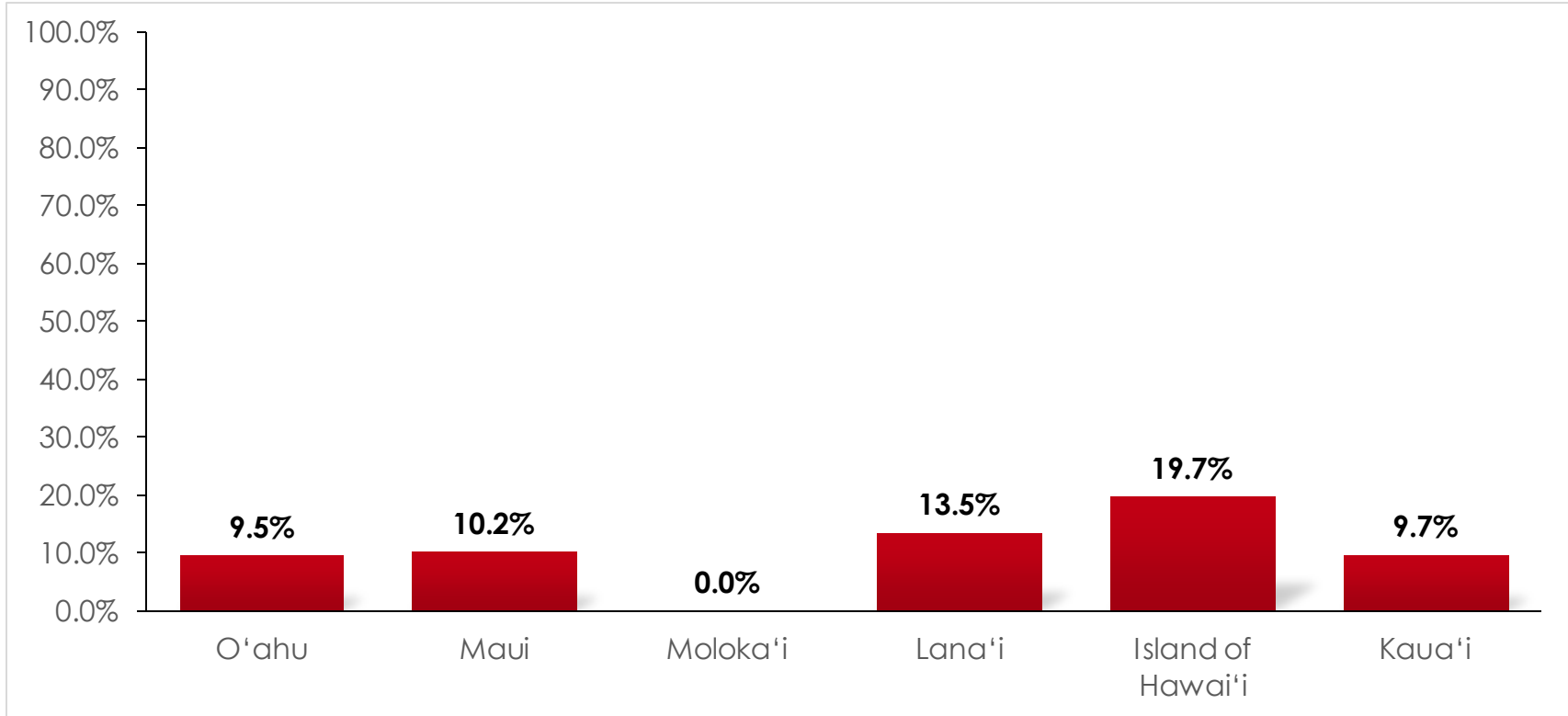
# IMPACT OF HAWAIIAN MUSIC – OCEANIA



# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – OCEANIA

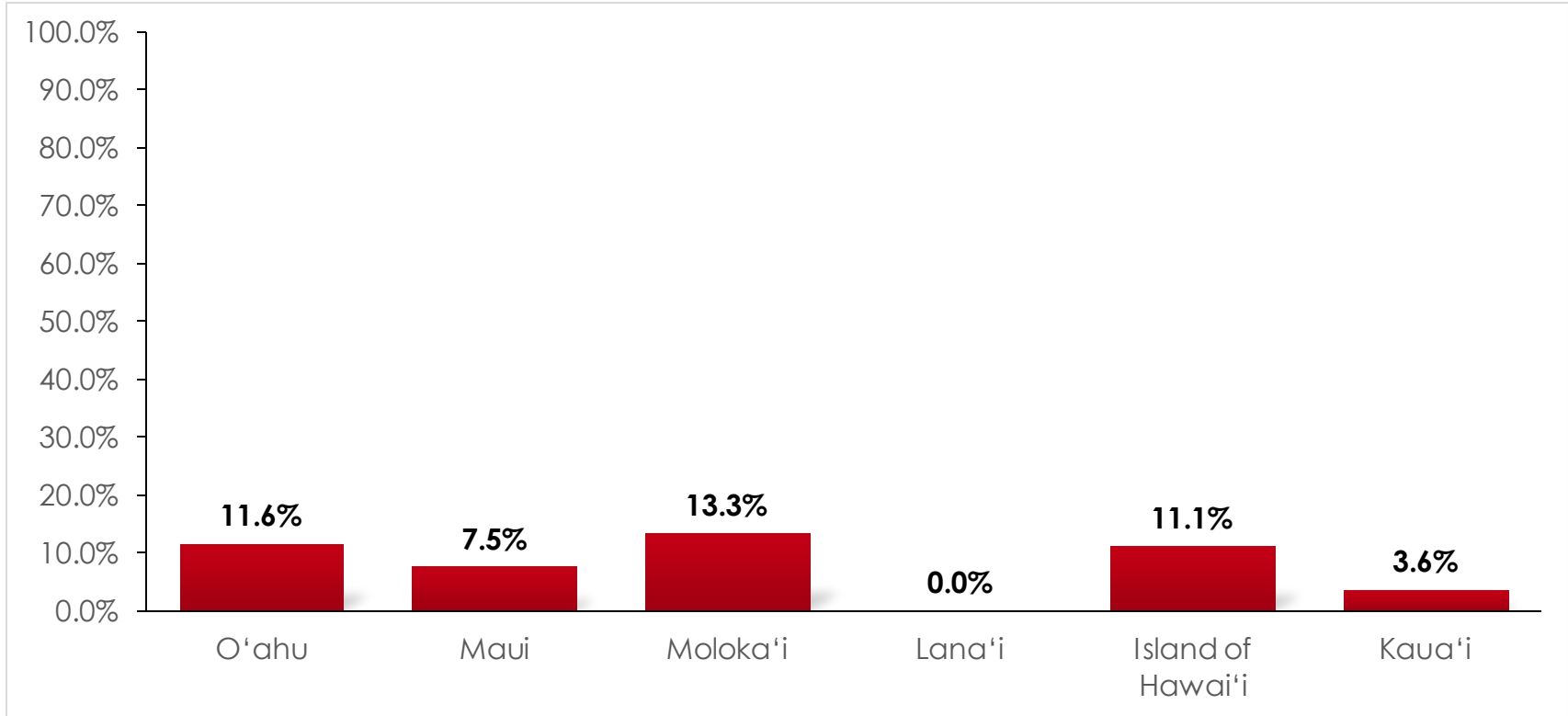


# IMPACT OF OUTDOOR/ SPORTING EVENTS – OCEANIA

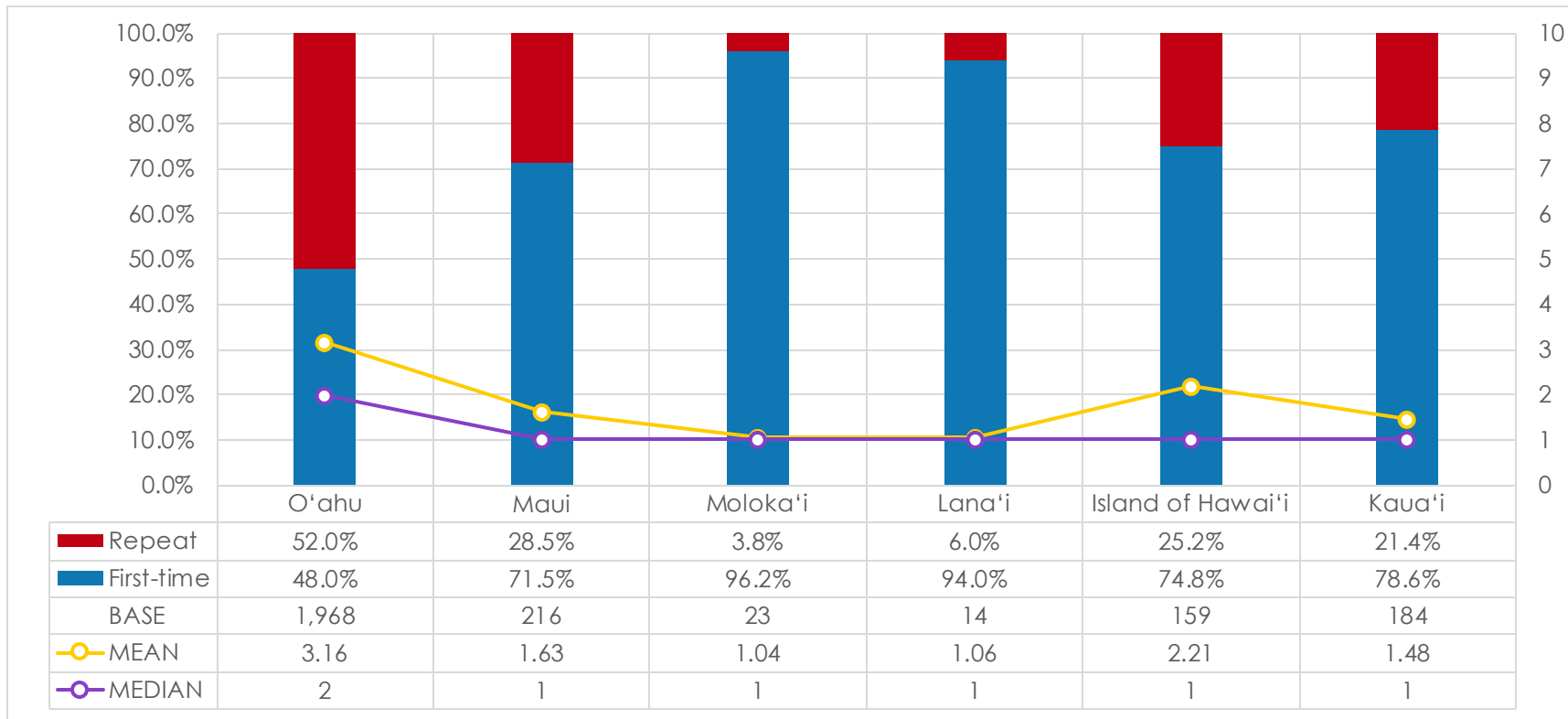




# IMPACT OF HAWAIIAN CULTURAL EVENTS – OCEANIA



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – OCEANIA

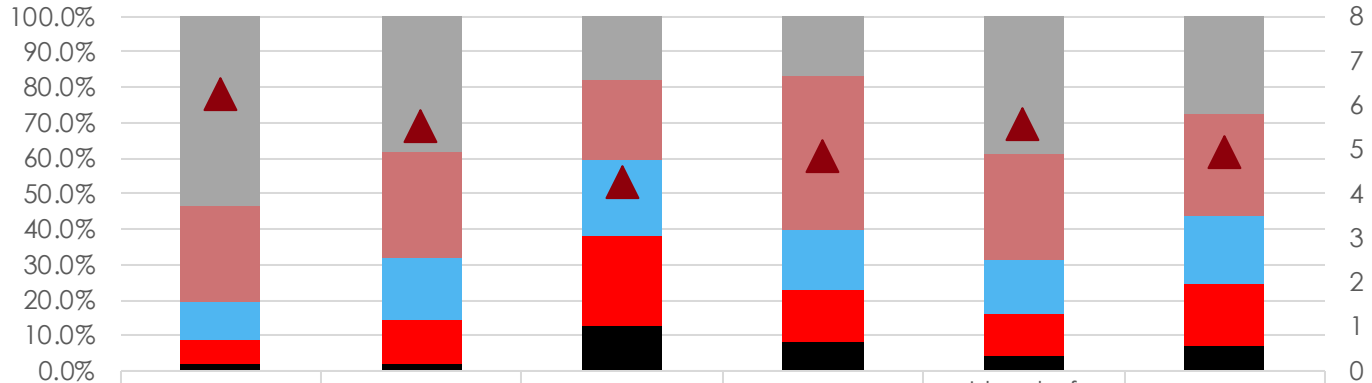


# TRAVEL PARTY MEMBERS – OCEANIA

	2016	2017	2018	2019
Spouse	67.5%	67.7%	66.8%	62.8%
Other adult family	21.5%	22.2%	22.3%	23.9%
Child under 18	22.4%	25.2%	23.1%	21.3%
Friends/ associates	16.0%	15.9%	15.7%	16.4%
Alone	7.0%	7.2%	7.1%	7.7%
Girlfriend/ boyfriend	4.7%	4.5%	4.1%	4.9%
Same-sex partner	1.1%	1.0%	1.1%	1.1%

# LIKELIHOOD OF RETURN VISIT – OCEANIA

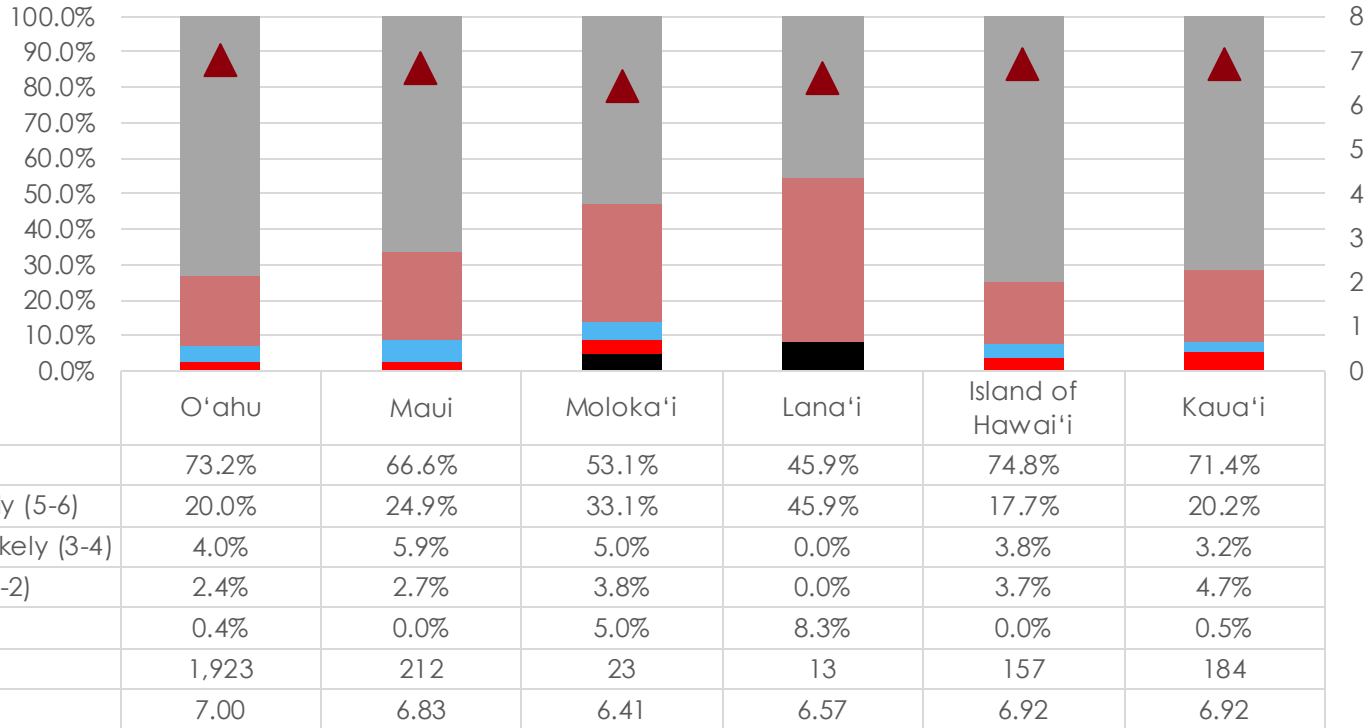
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	53.6%	38.5%	17.7%	16.6%	38.6%	27.5%
■ Somewhat likely (5-6)	27.2%	29.8%	22.7%	43.9%	30.0%	28.9%
■ Somewhat unlikely (3-4)	10.5%	17.6%	21.5%	16.6%	15.4%	19.1%
■ Very unlikely (1-2)	6.6%	12.1%	25.4%	14.6%	12.0%	17.7%
■ Not sure	2.1%	2.0%	12.7%	8.3%	4.0%	6.9%
BASE	1,942	213	23	13	158	184
▲ MEAN	6.25	5.51	4.24	4.81	5.57	4.90

# BRAND/DESTINATION ADVOCACY – OCEANIA

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



## ACTIVITIES – SIGHTSEEING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	90.6%	90.8%	91.2%	75.1%	94.9%	96.0%
<b>On own (self-guided)</b>	43.8%	57.0%	30.4%	21.0%	59.8%	49.9%
<b>Helicopter/ airplane</b>	3.9%	7.6%	8.8%	0.0%	21.1%	20.6%
<b>Boat/ submarine/ whale</b>	13.3%	23.0%	0.0%	16.6%	21.3%	22.0%
<b>Visit towns</b>	24.7%	41.3%	41.9%	6.4%	39.2%	43.8%
<b>Limo/ van/ bus tour</b>	33.2%	16.6%	26.5%	39.5%	24.1%	24.6%
<b>Scenic views/ natural landmark</b>	47.6%	46.8%	48.1%	27.4%	50.1%	56.8%
<b>Movie/ TV/ film location</b>	11.0%	0.6%	0.0%	8.3%	4.6%	7.5%

## STATEWIDE - ACTIVITIES – SIGHTSEEING - OCEANIA

	2017	2018	2019
<b>TOTAL</b>	92.9%	92.3%	92.0%
<b>On own (self-guided)</b>	46.8%	48.7%	48.2%
<b>Helicopter/ airplane</b>	7.2%	8.2%	7.1%
<b>Boat/ submarine/ whale</b>	20.0%	18.7%	16.4%
<b>Visit towns</b>	20.2%	31.4%	29.4%
<b>Limo/ van/ bus tour</b>	35.9%	35.9%	32.4%
<b>Scenic views/ natural landmark</b>	62.9%	51.7%	50.3%
<b>Movie/ TV/ film location</b>	8.4%	9.6%	10.2%

## ACTIVITIES – RECREATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	92.8%	90.0%	71.9%	77.1%	95.1%	85.1%
<b>Beach/ sunbathing</b>	77.2%	71.6%	40.4%	37.6%	62.4%	52.4%
<b>Bodyboard/ Standup paddle board</b>	7.8%	6.7%	0.0%	0.0%	7.8%	5.6%
<b>Surfing</b>	7.9%	5.2%	0.0%	0.0%	3.1%	2.1%
<b>Canoeing/ kayak</b>	2.8%	2.1%	3.8%	0.0%	5.7%	7.4%
<b>Swim- ocean</b>	64.4%	67.5%	22.7%	29.3%	56.5%	43.5%
<b>Snorkel</b>	23.9%	36.8%	13.9%	14.6%	38.0%	24.1%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
<b>Jet ski/ Parasail</b>	1.3%	1.3%	0.0%	0.0%	0.6%	0.6%
<b>Scuba</b>	0.5%	1.4%	0.0%	0.0%	1.1%	0.0%
<b>Fishing</b>	0.5%	1.0%	0.0%	0.0%	1.4%	0.6%
<b>Golf</b>	2.0%	5.4%	0.0%	8.3%	3.3%	3.6%



# STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	92.2%	94.1%	93.4%
<b>Beach/ sunbathing</b>	78.7%	78.4%	75.8%
<b>Bodyboard/ Standup paddle board</b>	12.1%	9.6%	8.1%
<b>Surfing</b>	9.3%	9.4%	7.5%
<b>Canoeing/ kayak</b>	4.2%	4.0%	3.5%
<b>Swim- ocean</b>	NA	64.1%	64.2%
<b>Snorkel</b>	NA	27.7%	27.2%
<b>Windsurf/ Kitesurf</b>	0.3%	0.2%	0.0%
<b>Jet ski/ Parasail</b>	1.4%	1.4%	1.3%
<b>Scuba</b>	1.5%	1.1%	0.6%
<b>Fishing</b>	1.1%	1.1%	0.7%
<b>Golf</b>	3.2%	3.1%	2.8%

## ACTIVITIES – RECREATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	92.8%	90.0%	71.9%	77.1%	95.1%	85.1%
<b>Run/ Jog/ Fitness walk</b>	19.9%	20.5%	13.9%	0.0%	18.0%	14.8%
<b>Spa</b>	5.8%	7.5%	0.0%	0.0%	5.1%	2.7%
<b>Hiking</b>	21.2%	22.6%	21.5%	14.6%	28.8%	23.6%
<b>Backpack/Camp</b>	0.3%	1.4%	5.0%	0.0%	1.3%	1.1%
<b>Agritourism</b>	8.8%	4.2%	5.0%	0.0%	5.5%	6.8%
<b>Sport event/ tournament</b>	2.5%	0.0%	0.0%	0.0%	4.4%	1.0%
<b>Park/ botanical garden</b>	28.3%	18.1%	23.9%	0.0%	46.0%	31.5%
<b>Waterpark</b>	1.2%	1.0%	0.0%	0.0%	2.9%	0.5%
<b>Mountain tube/ waterfall rappel</b>	0.2%	0.0%	0.0%	0.0%	1.1%	11.6%
<b>Zip-lining</b>	2.5%	3.5%	0.0%	8.3%	2.6%	5.9%
<b>Skydiving</b>	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	4.3%	0.6%	0.0%	6.4%	3.3%	3.1%
<b>Horseback riding</b>	0.9%	0.9%	0.0%	0.0%	0.0%	1.1%

# STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	92.2%	94.1%	93.4%
<b>Run/ Jog/ Fitness walk</b>	28.2%	22.8%	20.1%
<b>Spa</b>	7.4%	7.7%	6.1%
<b>Hiking</b>	9.1%	10.8%	22.9%
<b>Backpack/Camp</b>	*	*	0.6%
<b>Agritourism</b>	5.1%	8.1%	8.6%
<b>Sport event/ tournament</b>	1.9%	2.0%	2.5%
<b>Park/ botanical garden</b>	29.7%	32.9%	30.4%
<b>Waterpark</b>	NA	2.0%	1.4%
<b>Mountain tube/ waterfall rappel</b>	NA	0.9%	1.2%
<b>Zip-lining</b>	NA	2.4%	3.1%
<b>Skydiving</b>	NA	0.1%	0.1%
<b>All terrain vehicle (ATV)</b>	NA	3.3%	4.1%
<b>Horseback riding</b>	NA	1.6%	1.0%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.6%	97.5%	83.5%	85.4%	94.7%	91.2%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	17.3%	17.3%	15.0%	8.3%	17.0%	18.8%
<b>Live music/ stage show</b>	23.2%	18.2%	5.0%	6.4%	14.5%	13.5%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.4%	4.7%	0.0%	8.3%	7.3%	2.1%
<b>Fine dining</b>	35.3%	38.5%	5.0%	29.3%	26.1%	18.9%
<b>Family restaurant</b>	68.4%	58.6%	29.2%	8.3%	50.5%	44.4%
<b>Fast food</b>	51.7%	33.2%	11.5%	8.3%	33.2%	25.8%
<b>Food truck</b>	24.0%	17.1%	8.8%	0.0%	12.9%	21.4%
<b>Café/ coffee house</b>	58.1%	53.6%	43.1%	45.9%	65.1%	45.6%
<b>Ethnic dining</b>	15.6%	10.4%	3.8%	0.0%	15.7%	7.1%
<b>Prepared own meal</b>	21.8%	33.5%	26.5%	8.3%	30.9%	35.2%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	98.6%	98.2%	97.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	24.2%	21.0%	18.6%
<b>Live music/ stage show</b>	23.9%	25.3%	23.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	9.0%	9.4%	8.0%
<b>Fine dining</b>	39.0%	38.3%	34.7%
<b>Family restaurant</b>	75.3%	67.7%	66.3%
<b>Fast food</b>	48.6%	49.9%	48.9%
<b>Food truck</b>	NA	23.9%	23.8%
<b>Café/ coffee house</b>	58.0%	58.8%	58.8%
<b>Ethnic dining</b>	16.5%	14.5%	15.5%
<b>Prepared own meal</b>	23.5%	25.2%	25.5%

## ACTIVITIES – SHOPPING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.9%	96.7%	83.5%	68.8%	93.6%	90.1%
<b>Mall/ department store</b>	80.7%	43.4%	27.7%	16.6%	44.2%	27.2%
<b>Designer boutique</b>	20.1%	18.7%	8.8%	0.0%	14.5%	9.6%
<b>Hotel/ resort store</b>	34.1%	33.9%	5.0%	8.3%	28.3%	14.0%
<b>Swap meet/ flea market</b>	10.0%	3.9%	0.0%	8.3%	10.6%	5.8%
<b>Discount/ outlet store</b>	47.4%	32.6%	13.9%	8.3%	22.1%	11.4%
<b>Supermarket</b>	48.3%	54.9%	41.6%	8.3%	53.4%	48.1%
<b>Farmer's market</b>	15.1%	18.2%	15.0%	8.3%	32.0%	24.2%
<b>Convenience store</b>	67.4%	48.1%	30.4%	8.3%	48.2%	33.6%
<b>Duty free store</b>	11.8%	4.4%	0.0%	8.3%	3.1%	1.8%
<b>Local shop/ artisan</b>	47.6%	51.4%	44.2%	52.2%	58.3%	61.2%

# STATEWIDE - ACTIVITIES – SHOPPING – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	98.0%	96.9%	96.7%
<b>Mall/ department store</b>	81.9%	78.0%	75.1%
<b>Designer boutique</b>	26.1%	23.8%	19.6%
<b>Hotel/ resort store</b>	35.1%	35.2%	33.9%
<b>Swap meet/ flea market</b>	13.7%	9.2%	9.8%
<b>Discount/ outlet store</b>	53.3%	49.4%	44.6%
<b>Supermarket</b>	45.0%	54.0%	50.6%
<b>Farmer's market</b>	15.1%	17.0%	18.1%
<b>Convenience store</b>	62.0%	65.1%	64.1%
<b>Duty free store</b>	11.9%	12.5%	10.8%
<b>Local shop/ artisan</b>	53.2%	51.3%	50.8%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	71.9%	54.4%	70.8%	31.2%	66.5%	50.6%
<b>Historic military site</b>	47.0%	4.5%	8.8%	16.6%	22.0%	2.2%
<b>Other historical site</b>	19.1%	17.2%	27.7%	14.6%	33.8%	28.3%
<b>Museum/ art gallery</b>	13.6%	17.7%	29.2%	8.3%	19.0%	10.4%
<b>Luau/ Polynesian show/ hula show</b>	27.4%	23.0%	18.9%	0.0%	24.1%	14.9%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	5.9%	3.7%	0.0%	0.0%	8.2%	3.8%
<b>Play/ concert/ theatre</b>	3.6%	1.3%	3.8%	0.0%	2.2%	0.0%
<b>Art/ craft fair</b>	5.8%	6.8%	18.9%	0.0%	9.0%	8.7%
<b>Festival event</b>	4.8%	1.5%	3.8%	0.0%	4.0%	3.1%



## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	74.0%	74.6%	71.6%
<b>Historic military site</b>	52.8%	45.5%	41.8%
<b>Other historical site</b>	23.7%	21.7%	21.7%
<b>Museum/ art gallery</b>	14.3%	14.5%	15.0%
<b>Luau/ Polynesian show/ hula show</b>	34.3%	31.5%	28.1%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.0%	6.6%	6.1%
<b>Play/ concert/ theatre</b>	3.2%	4.4%	3.4%
<b>Art/ craft fair</b>	5.4%	5.6%	6.9%
<b>Festival event</b>	6.8%	4.1%	4.8%

# ACTIVITIES – TRANSPORTATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	97.0%	94.2%	83.5%	66.9%	93.4%	93.8%
<b>Airport shuttle</b>	52.9%	26.2%	8.8%	6.4%	25.2%	14.6%
<b>Trolley</b>	24.9%	4.8%	7.7%	8.3%	15.2%	5.3%
<b>Public bus</b>	31.7%	13.0%	8.8%	14.6%	13.7%	9.0%
<b>Tour bus/ tour van</b>	35.5%	18.2%	40.4%	16.6%	27.8%	30.4%
<b>Taxi/ limo</b>	37.9%	17.5%	10.0%	31.2%	22.9%	14.6%
<b>Rental car</b>	25.6%	52.5%	30.4%	12.7%	51.9%	48.4%
<b>Ride share</b>	26.8%	16.9%	0.0%	16.6%	12.4%	5.8%
<b>Bicycle rental</b>	1.6%	2.4%	0.0%	0.0%	0.0%	1.6%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – OCEANIA

	2017	2018	2019
<b>TOTAL</b>	98.7%	96.9%	96.6%
<b>Airport shuttle</b>	60.8%	53.1%	48.5%
<b>Trolley</b>	23.7%	22.6%	22.8%
<b>Public bus</b>	27.7%	30.1%	29.4%
<b>Tour bus/ tour van</b>	35.8%	37.0%	35.3%
<b>Taxi/ limo</b>	43.2%	39.0%	35.9%
<b>Rental car</b>	31.8%	31.0%	32.5%
<b>Ride share</b>	NA	20.6%	24.7%
<b>Bicycle rental</b>	NA	1.7%	1.7%

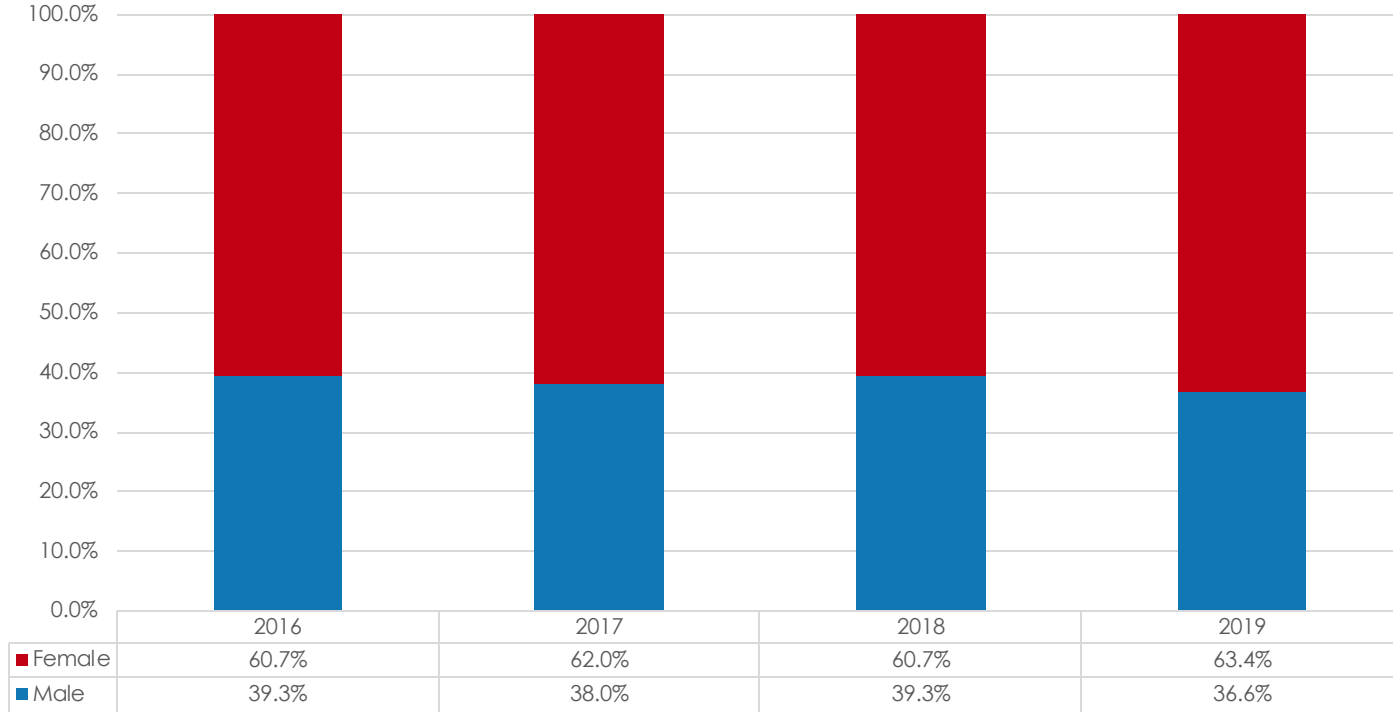
## ACTIVITIES – OTHER – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	8.2%	14.3%	3.8%	14.6%	10.5%	6.8%
Visit friends/ family	7.8%	13.9%	3.8%	14.6%	9.8%	6.8%
Volunteer- non-profit	0.7%	0.9%	0.0%	0.0%	1.3%	0.0%

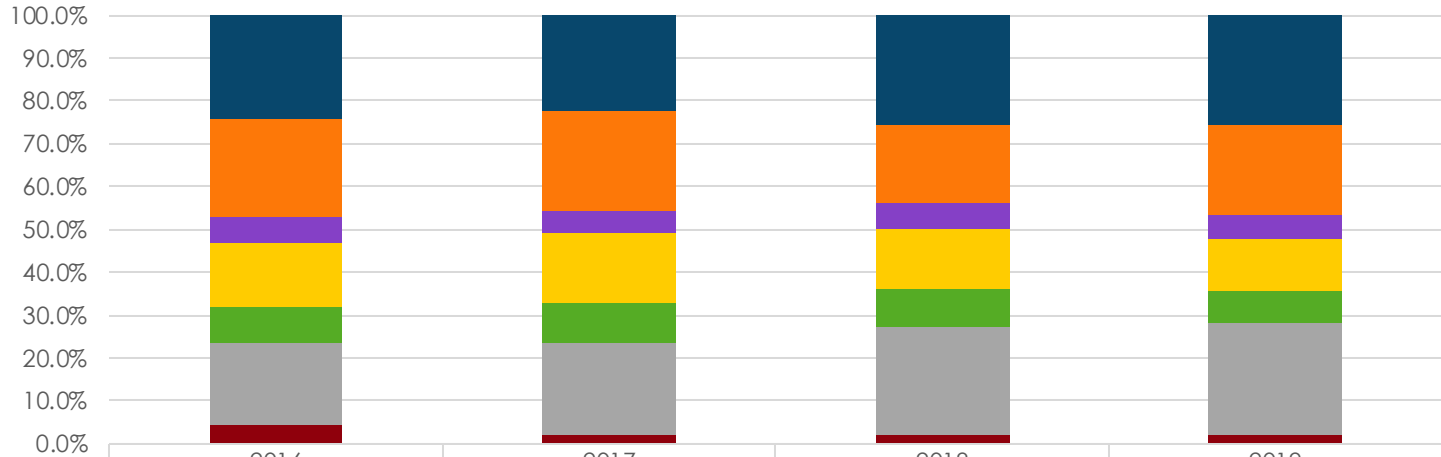
## ACTIVITIES – OTHER – OCEANIA

	2018	2019
<b>TOTAL</b>	9.1%	9.2%
<b>Visit friends/ family</b>	8.4%	8.8%
<b>Volunteer- non-profit</b>	0.9%	0.7%

# VISITOR PROFILE – GENDER – OCEANIA

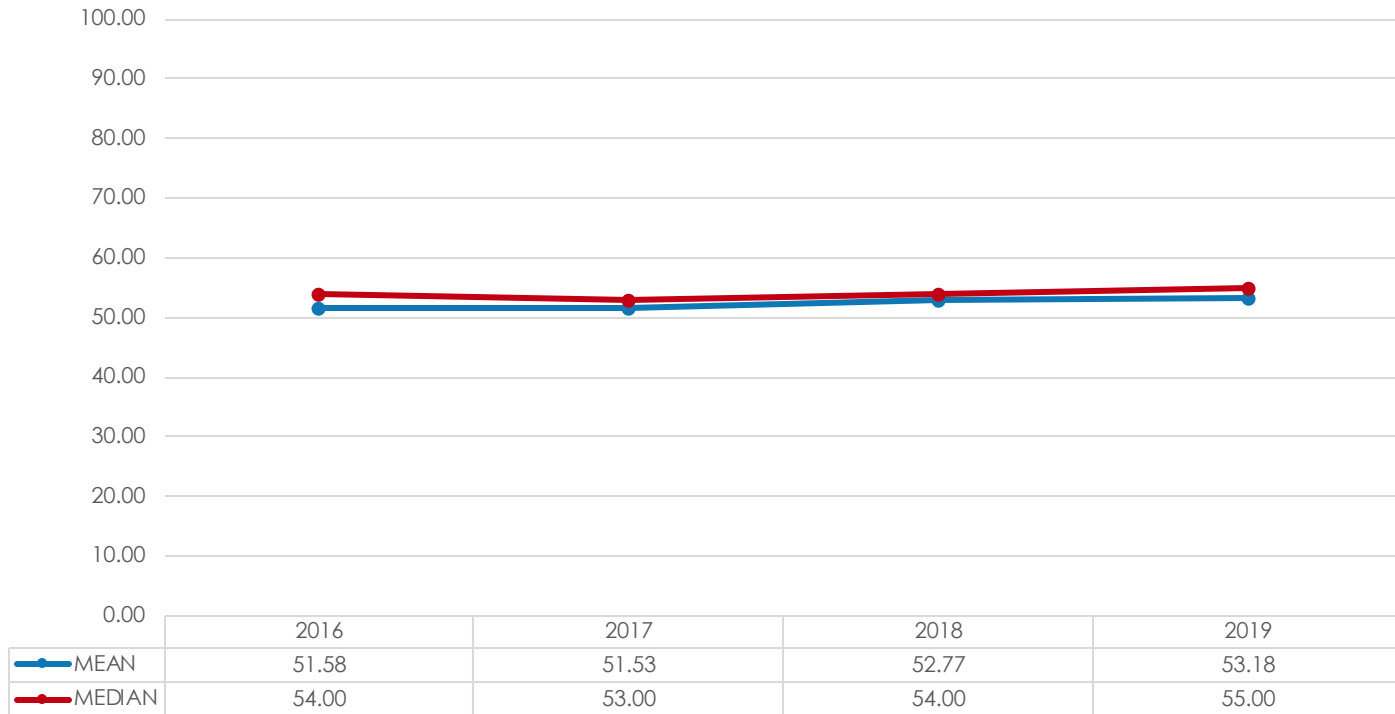


# VISITOR PROFILE – EDUCATION – OCEANIA



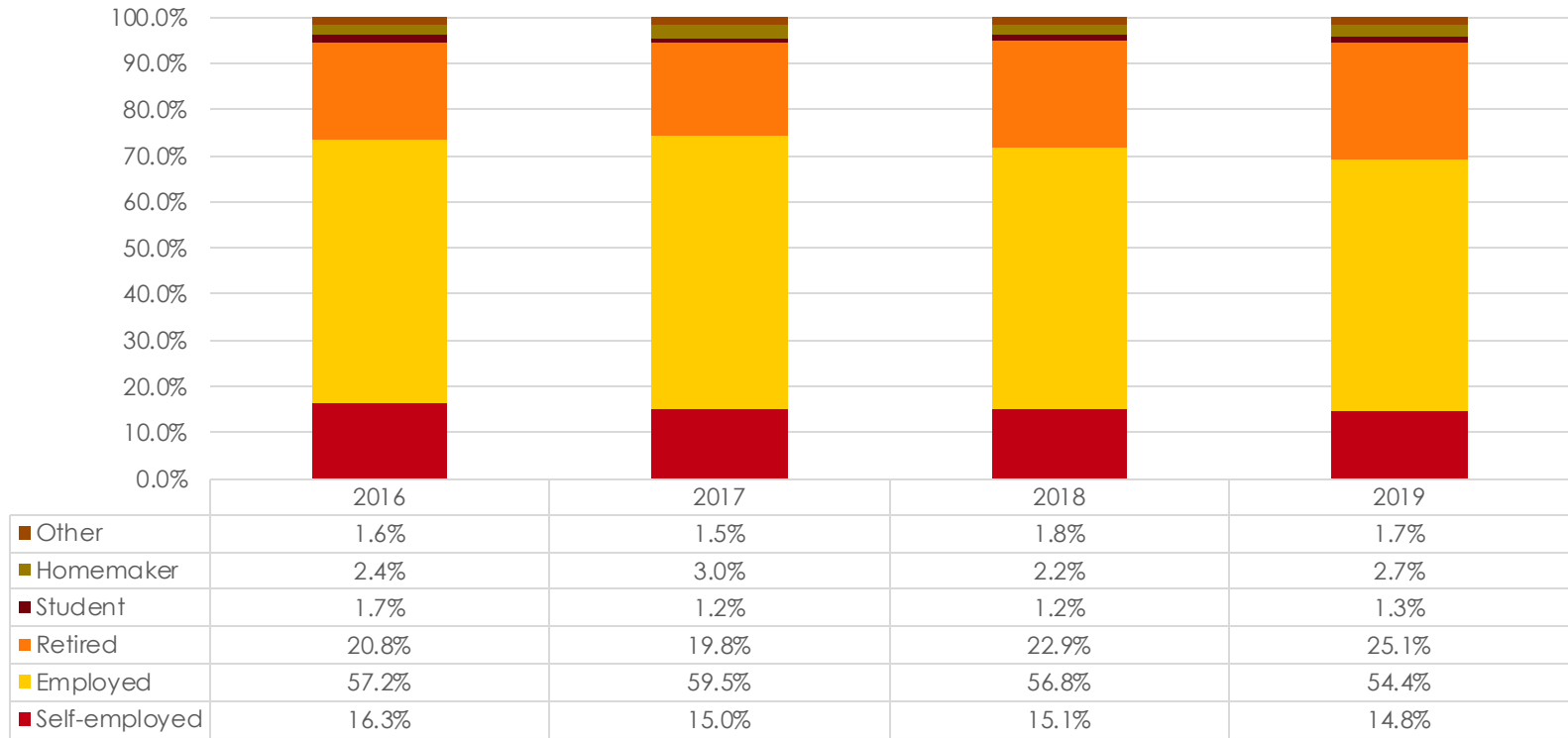
	2016	2017	2018	2019
Post-Graduate	24.1%	22.6%	25.4%	25.5%
College Grad	22.9%	23.0%	18.5%	21.1%
Associate Degree	6.2%	5.1%	5.8%	5.6%
Vocational/ Tech	15.0%	16.6%	14.4%	12.3%
Some College	8.4%	9.4%	8.7%	7.5%
H.S. Grad	19.1%	21.5%	25.3%	26.1%
Some / No H.S.	4.3%	1.9%	1.9%	2.0%

# VISITOR PROFILE – AGE – OCEANIA

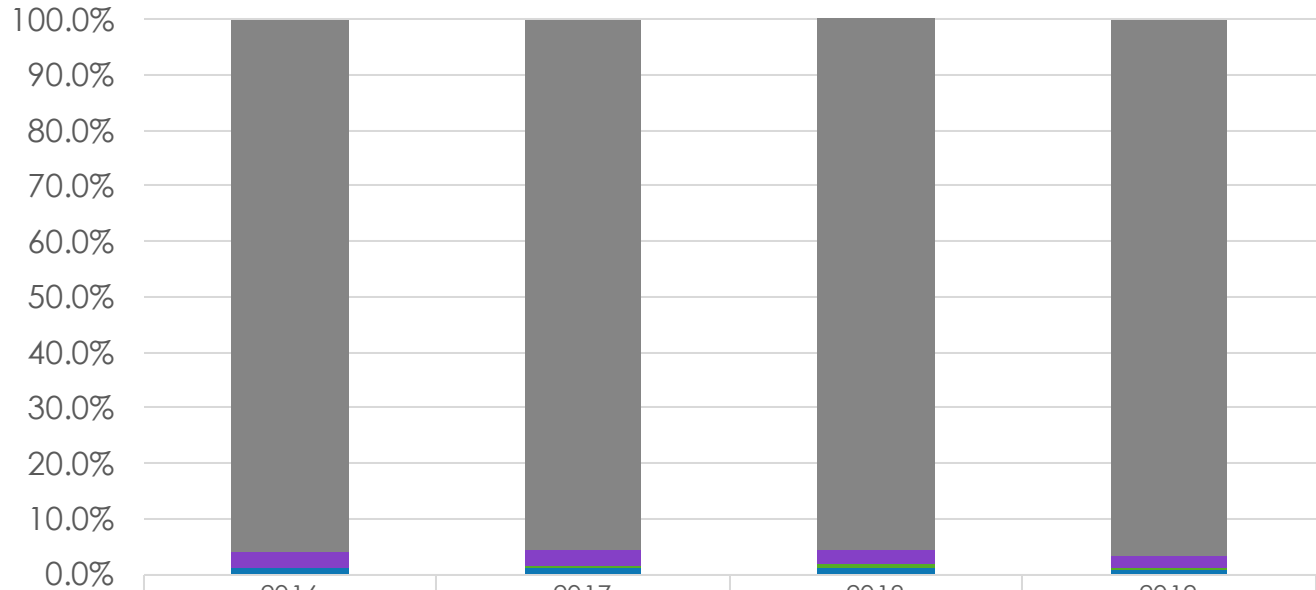




# VISITOR PROFILE – EMPLOYMENT STATUS – OCEANIA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – OCEANIA

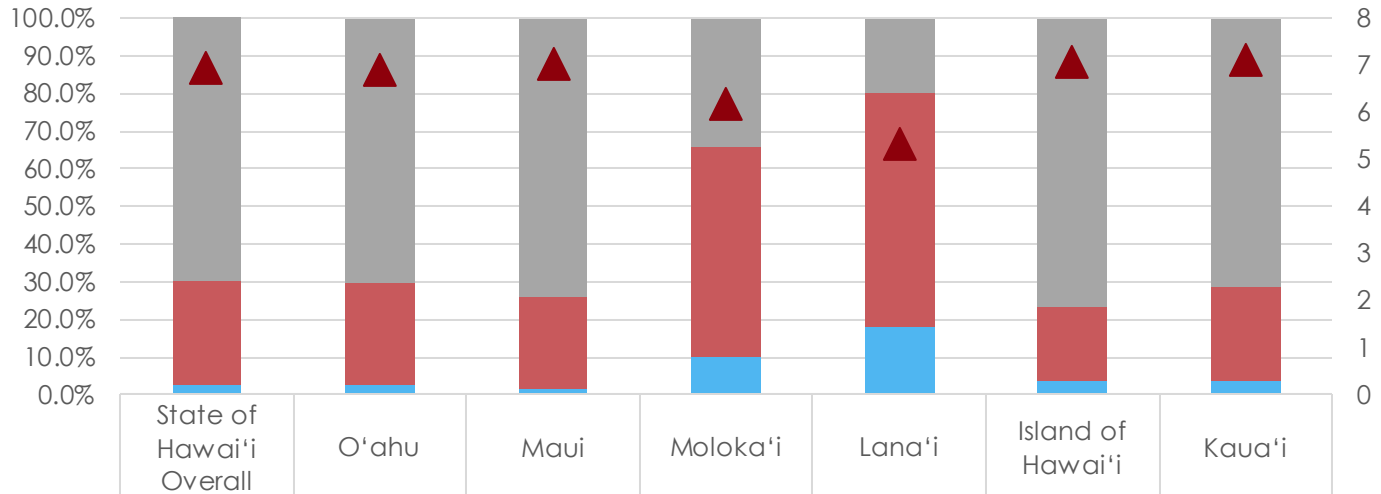


	2016	2017	2018	2019
■ Do not nor plan to purchase	96.0%	95.7%	95.8%	96.7%
■ Plan to in future	2.9%	3.0%	2.5%	2.2%
■ Other Property Type	0.1%	0.3%	0.7%	0.5%
■ Timeshare	1.0%	1.0%	1.1%	0.6%

# SECTION – CHINA

# OVERALL SATISFACTION – MOST RECENT VISIT – CHINA

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



■ Excellent (7-8)	69.8%	70.1%	74.1%	34.0%	20.0%	76.6%	71.4%
■ Above Average (5-6)	27.6%	27.1%	24.3%	56.0%	61.8%	20.0%	24.7%
■ Below Average (3-4)	2.0%	2.4%	1.5%	10.0%	18.2%	3.4%	3.9%
■ Poor (1-2)	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	1,241	1,090	198	9	10	390	28
▲ MEAN	6.93	6.91	7.02	6.18	5.33	7.08	7.10

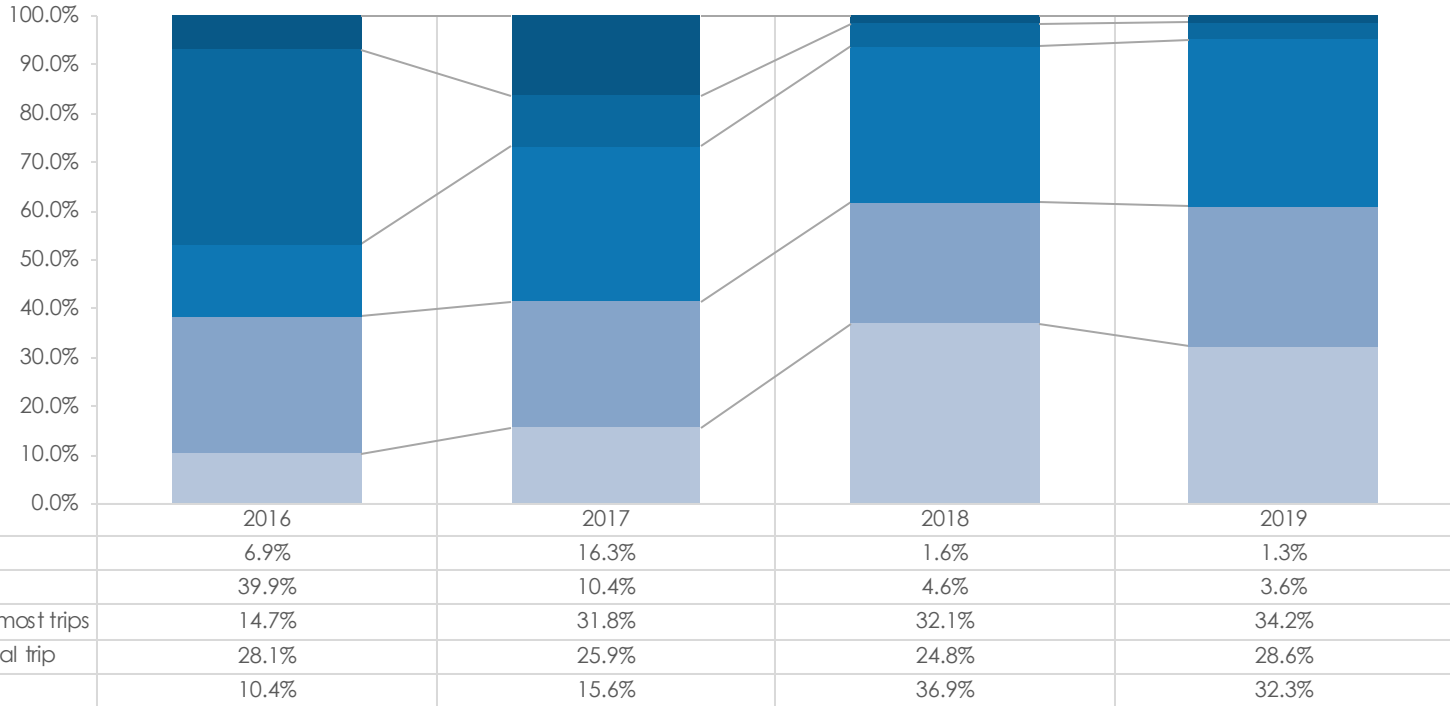
# PRIMARY TRIP PURPOSE CHINA

	2018	2019
Vacation	71.2%	72.6%
Business trip	3.8%	5.3%
Convention, conference, seminar	2.9%	4.2%
Wedding	1.6%	2.6%
Visit friends/ relatives	3.2%	2.4%
Honeymoon	3.7%	2.3%

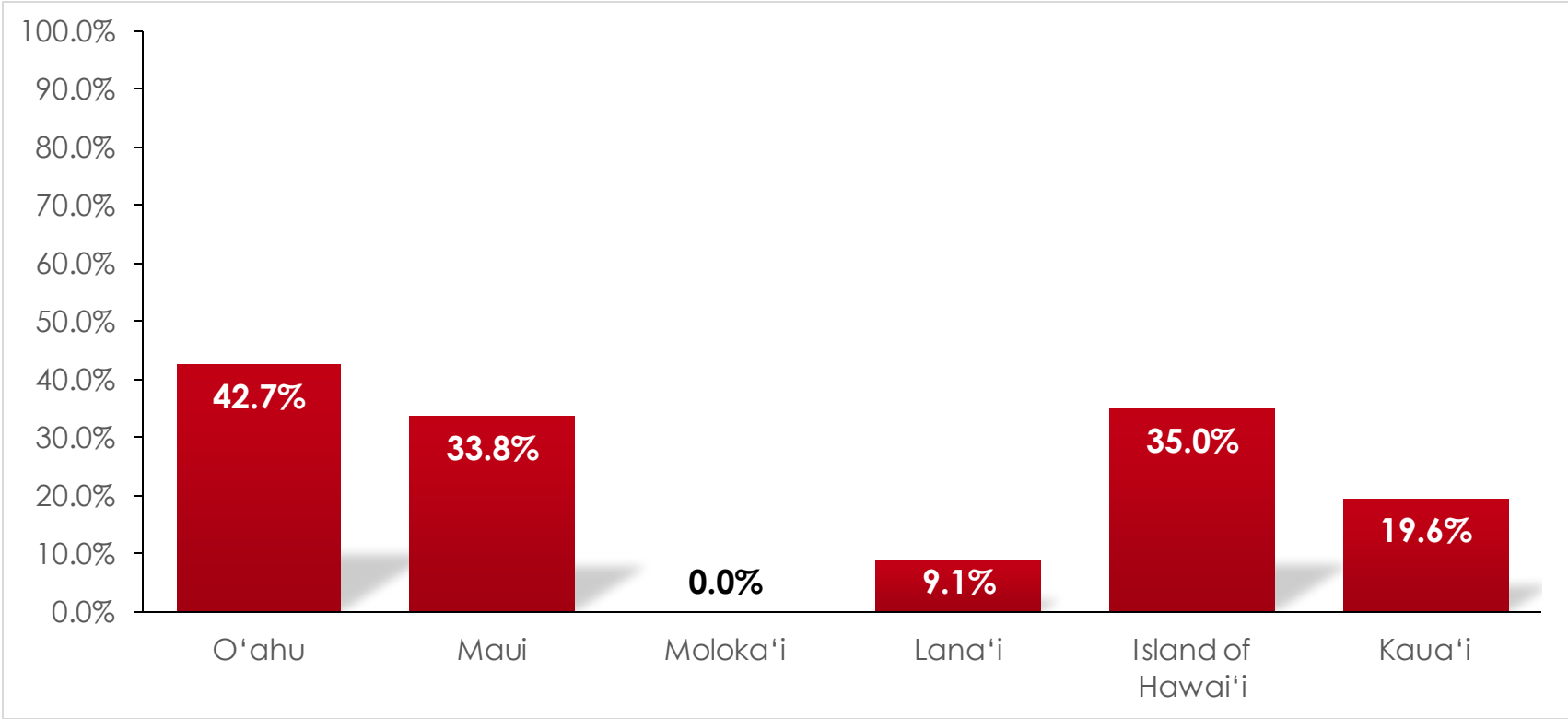
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE CHINA

	2018	2019
Vacation	89.0%	88.1%
Shopping/ fashion	16.8%	14.1%
Business trip	5.4%	6.3%
Convention, conference, seminar	5.5%	5.0%
Visit friends/ relatives	7.9%	4.4%
Family gathering/ reunion	8.5%	4.3%
Vacation home/ timeshare	2.6%	3.3%
Wedding	1.7%	3.3%
Honeymoon	10.1%	3.0%

# VACATION TRIP DESCRIPTION – CHINA

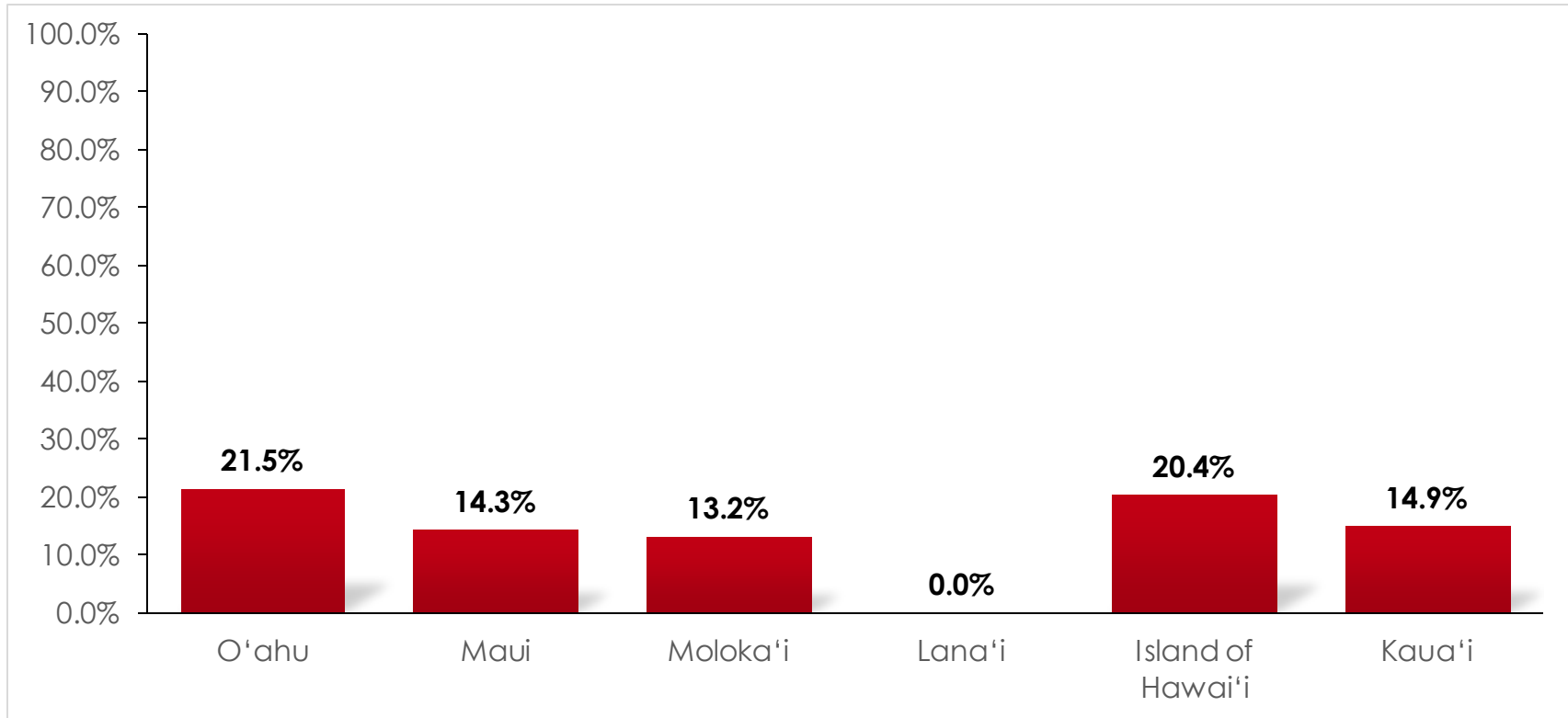


# ADVERTISING AWARENESS – CHINA

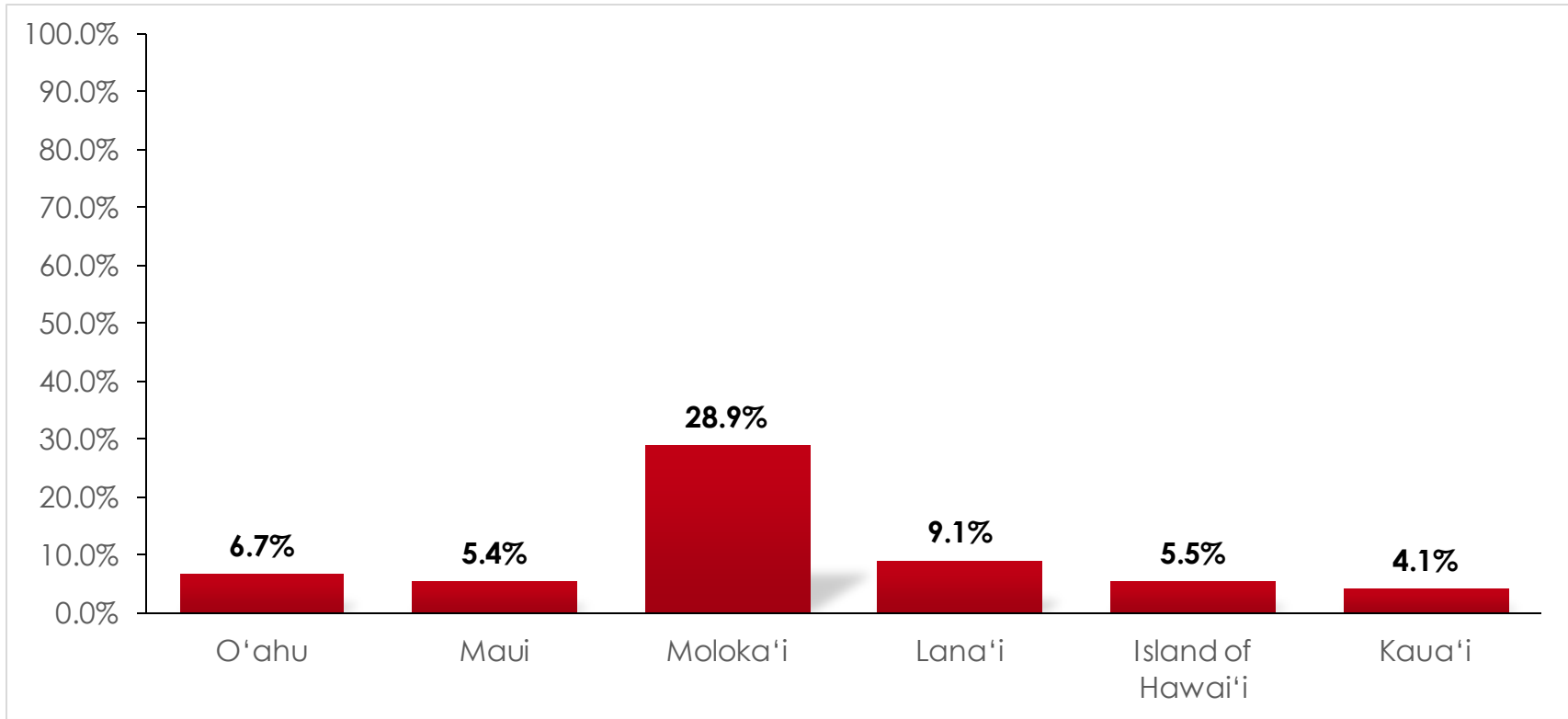




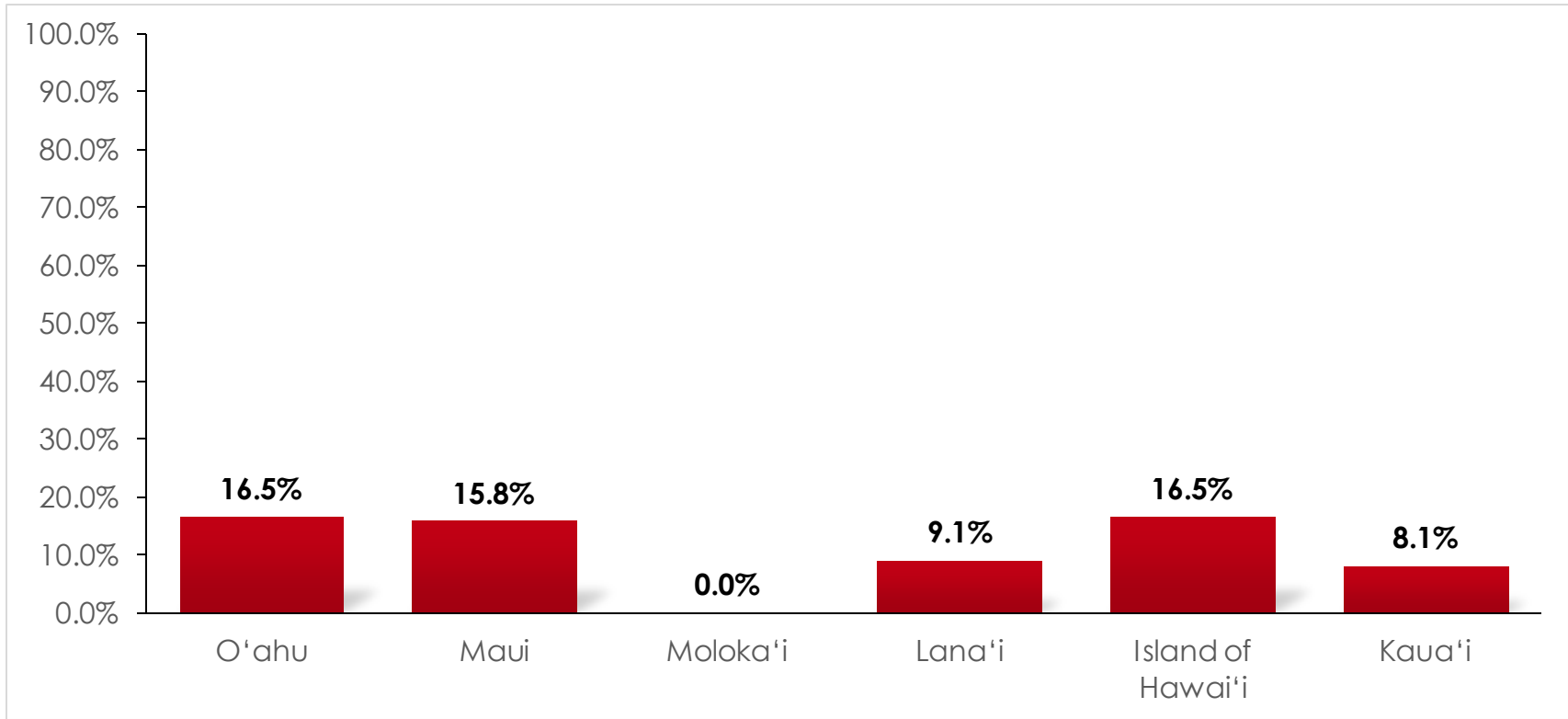
# IMPACT OF LOCATION FILMING – CHINA



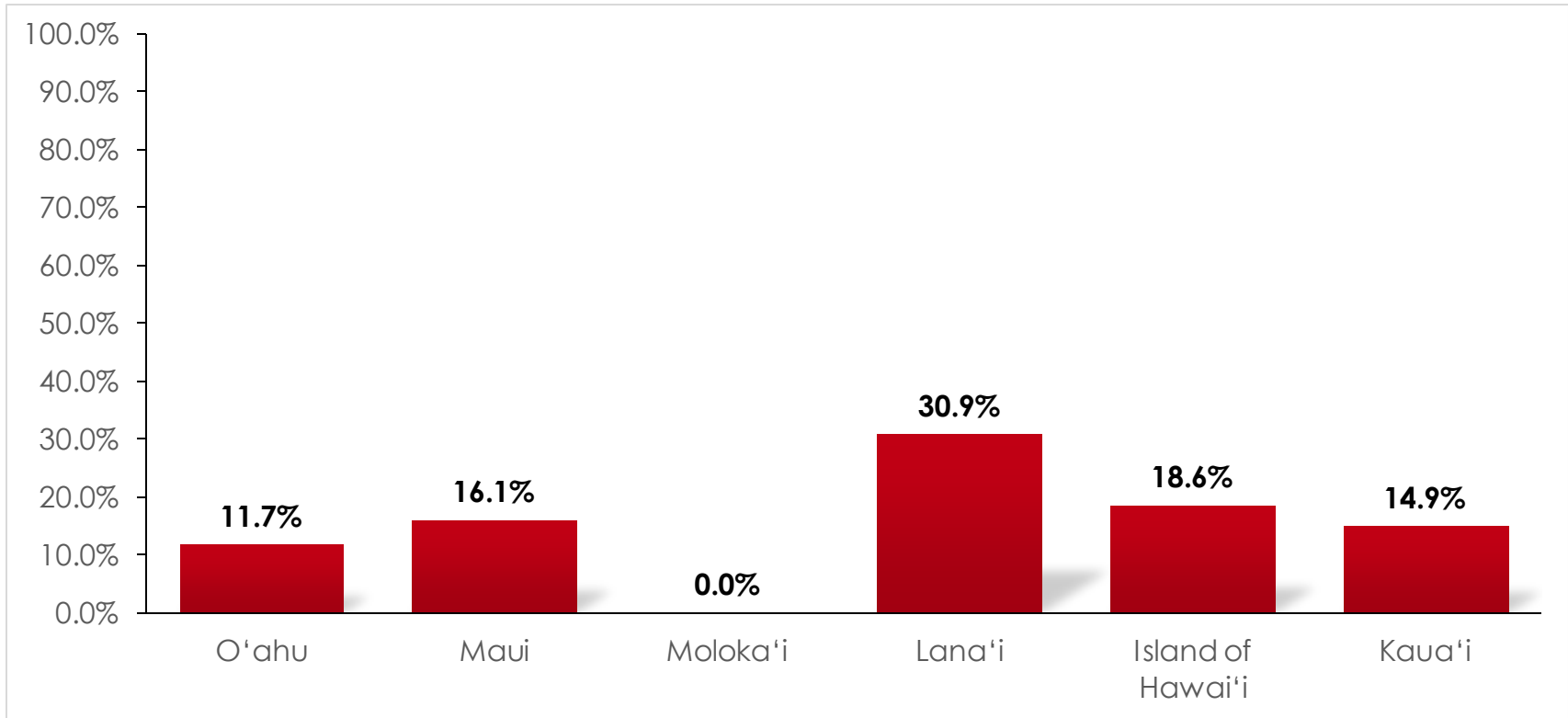
# IMPACT OF HAWAIIAN MUSIC – CHINA



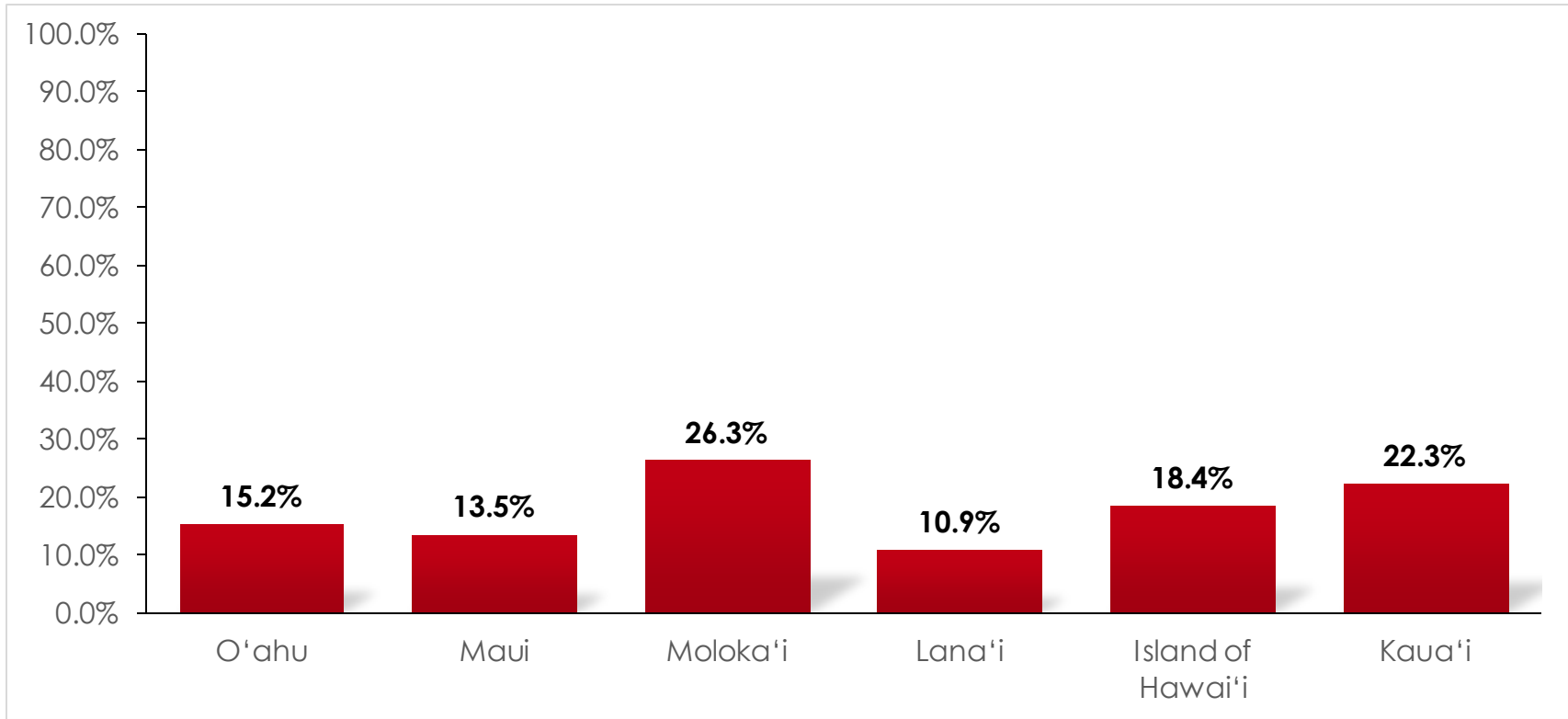
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – CHINA



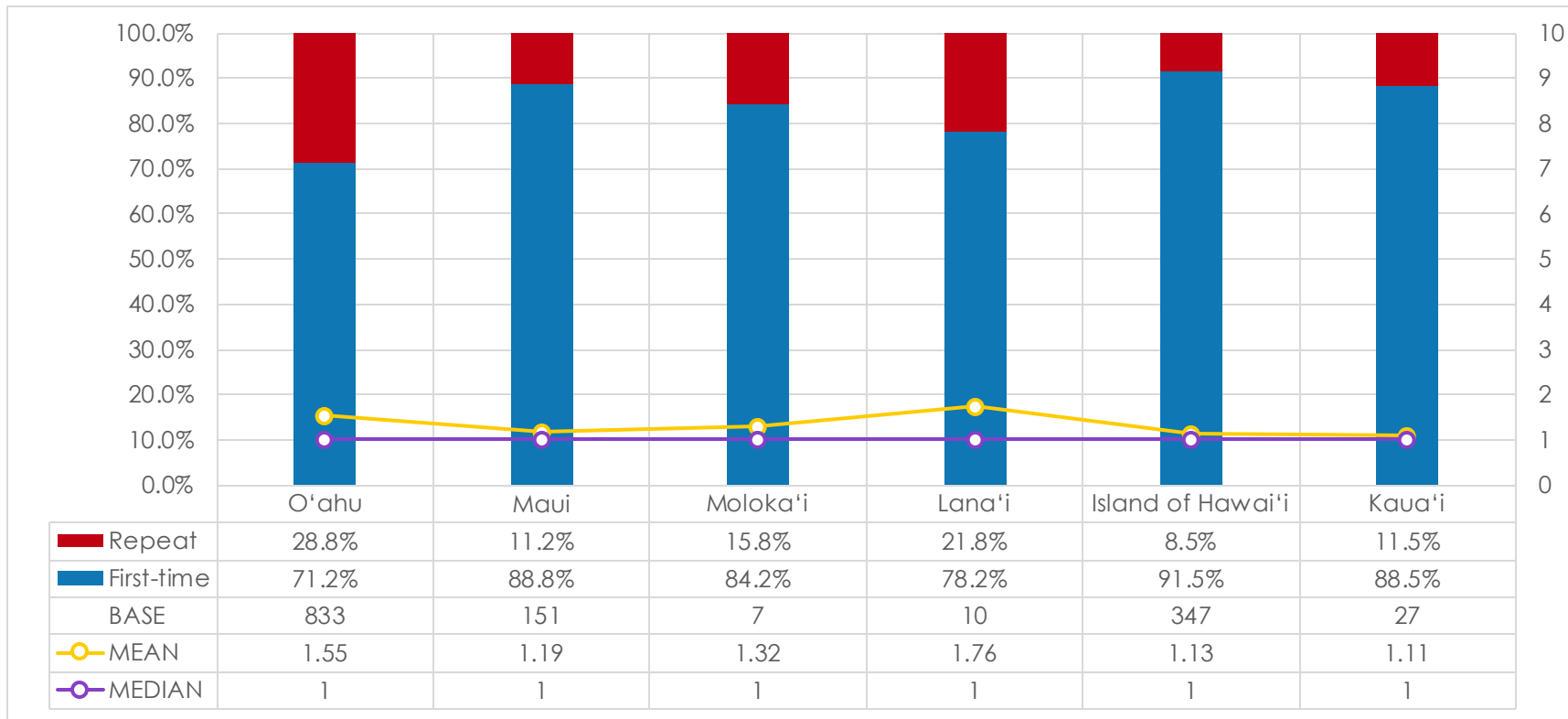
# IMPACT OF OUTDOOR/ SPORTING EVENTS – CHINA



# IMPACT OF HAWAIIAN CULTURAL EVENTS – CHINA



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – CHINA

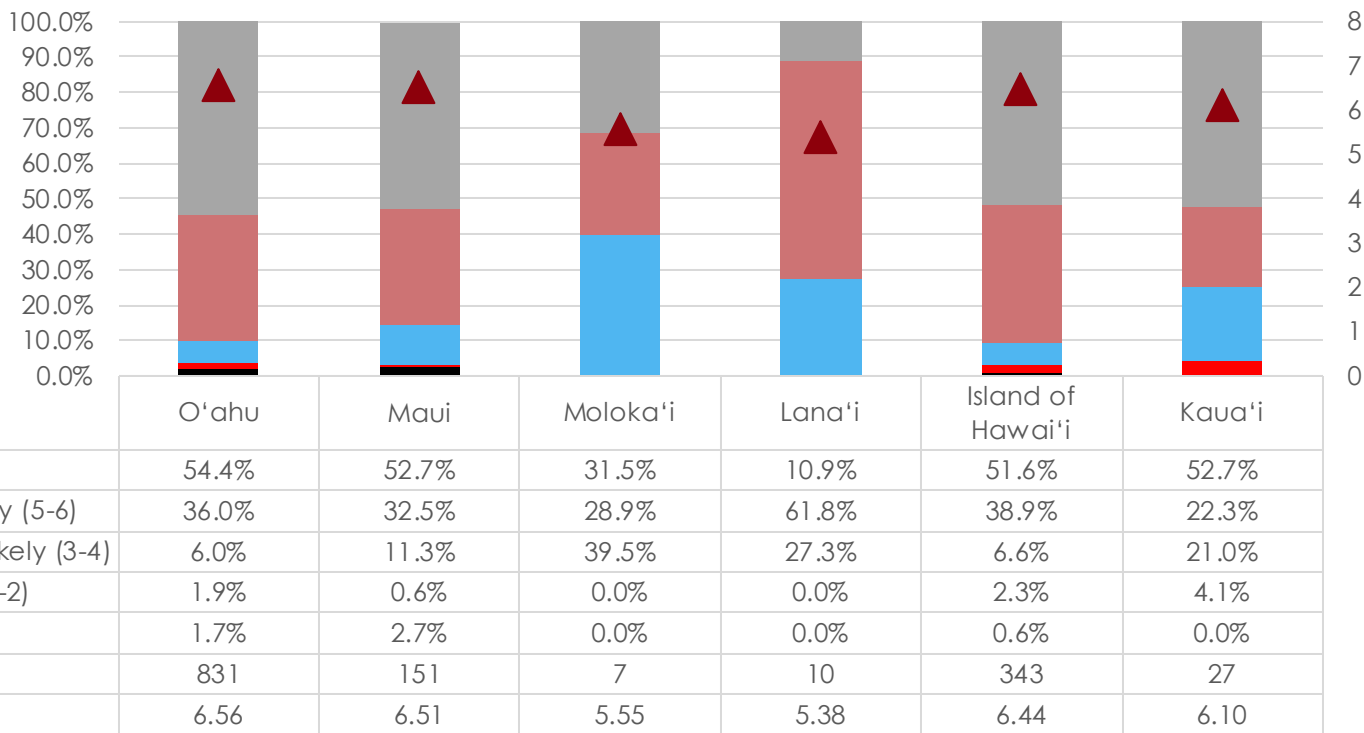


# TRAVEL PARTY MEMBERS – CHINA

	2016	2017	2018	2019
<b>Spouse</b>	47.6%	50.4%	45.3%	37.8%
<b>Other adult family</b>	21.0%	21.0%	25.0%	20.3%
<b>Child under 18</b>	15.0%	14.2%	22.4%	15.9%
<b>Friends/ associates</b>	21.5%	25.2%	24.3%	29.8%
<b>Alone</b>	13.9%	10.7%	8.5%	11.0%
<b>Girlfriend/ boyfriend</b>	4.1%	3.1%	9.7%	9.7%
<b>Same-sex partner</b>	1.8%	1.8%	2.2%	1.5%

# LIKELIHOOD OF RETURN VISIT – CHINA

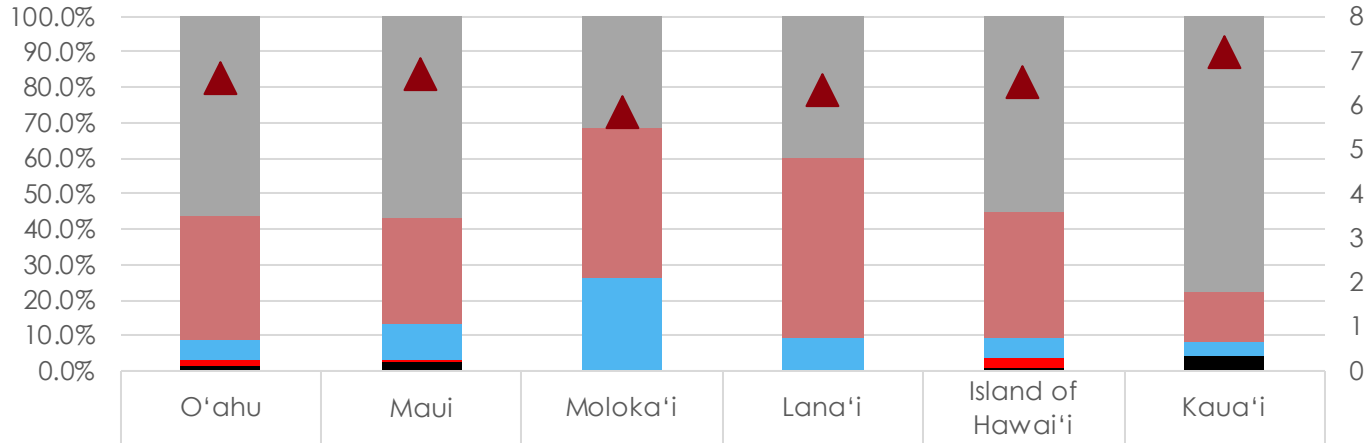
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely





# BRAND/DESTINATION ADVOCACY – CHINA

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



■ Very likely (7-8)	56.3%	57.1%	31.5%	40.0%	55.0%	77.7%
■ Somewhat likely (5-6)	34.7%	29.6%	42.1%	50.9%	35.6%	14.2%
■ Somewhat unlikely (3-4)	6.0%	10.0%	26.3%	9.1%	6.1%	4.1%
■ Very unlikely (1-2)	1.6%	0.6%	0.0%	0.0%	2.3%	0.0%
■ Not sure	1.4%	2.7%	0.0%	0.0%	1.1%	4.1%
BASE	827	151	7	10	342	27
▲ MEAN	6.60	6.66	5.81	6.31	6.52	7.16

## ACTIVITIES – SIGHTSEEING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	95.4%	96.0%	84.2%	90.9%	97.5%	100.0%
<b>On own (self-guided)</b>	54.6%	57.0%	15.8%	30.9%	53.7%	62.8%
<b>Helicopter/ airplane</b>	7.4%	6.1%	15.8%	30.9%	53.8%	11.5%
<b>Boat/ submarine/ whale</b>	28.9%	34.0%	26.3%	18.2%	14.8%	15.5%
<b>Visit towns</b>	29.9%	31.3%	13.2%	9.1%	26.4%	17.6%
<b>Limo/ van/ bus tour</b>	12.2%	9.4%	0.0%	30.9%	19.0%	11.5%
<b>Scenic views/ natural landmark</b>	54.2%	53.5%	39.5%	40.0%	13.0%	66.2%
<b>Movie/ TV/ film location</b>	14.8%	3.9%	0.0%	0.0%	71.7%	11.5%

## STATEWIDE - ACTIVITIES – SIGHTSEEING - CHINA

	2017	2018	2019
<b>TOTAL</b>	97.2%	95.7%	96.0%
<b>On own (self-guided)</b>	63.5%	59.6%	55.6%
<b>Helicopter/ airplane</b>	14.3%	22.8%	20.8%
<b>Boat/ submarine/ whale</b>	30.4%	27.6%	27.4%
<b>Visit towns</b>	20.7%	31.3%	30.9%
<b>Limo/ van/ bus tour</b>	22.0%	18.4%	14.8%
<b>Scenic views/ natural landmark</b>	65.5%	56.3%	46.3%
<b>Movie/ TV/ film location</b>	21.3%	29.6%	28.4%

# ACTIVITIES – RECREATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.8%	93.5%	100.0%	89.1%	94.3%	88.5%
<b>Beach/ sunbathing</b>	72.9%	72.7%	55.3%	78.2%	66.1%	61.5%
<b>Bodyboard/ Standup paddle board</b>	2.3%	3.2%	0.0%	0.0%	2.0%	0.0%
<b>Surfing</b>	6.4%	6.7%	0.0%	20.0%	6.0%	0.0%
<b>Canoeing/ kayak</b>	2.1%	6.2%	31.5%	10.9%	2.4%	3.4%
<b>Swim- ocean</b>	35.1%	27.4%	15.8%	20.0%	31.8%	18.9%
<b>Snorkel</b>	20.4%	25.1%	28.9%	18.2%	23.9%	23.0%
<b>Windsurf/ Kitesurf</b>	0.8%	0.0%	0.0%	0.0%	1.5%	0.0%
<b>Jet ski/ Parasail</b>	1.5%	0.6%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	5.0%	0.0%	15.8%	9.1%	2.8%	0.0%
<b>Fishing</b>	4.0%	2.1%	0.0%	0.0%	2.2%	0.0%
<b>Golf</b>	4.4%	3.0%	0.0%	0.0%	3.2%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – CHINA

	2017	2018	2019
<b>TOTAL</b>	94.7%	94.1%	93.5%
<b>Beach/ sunbathing</b>	81.9%	75.1%	71.3%
<b>Bodyboard/ Standup paddle board</b>	6.2%	4.0%	2.4%
<b>Surfing</b>	7.6%	7.9%	6.7%
<b>Canoeing/ kayak</b>	3.9%	3.8%	3.1%
<b>Swim- ocean</b>	NA	39.2%	34.3%
<b>Snorkel</b>	NA	21.0%	22.6%
<b>Windsurf/ Kitesurf</b>	1.3%	1.9%	0.9%
<b>Jet ski/ Parasail</b>	2.3%	1.1%	1.1%
<b>Scuba</b>	4.5%	3.6%	4.1%
<b>Fishing</b>	4.1%	4.9%	3.5%
<b>Golf</b>	2.8%	5.7%	4.2%

# ACTIVITIES – RECREATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.8%	93.5%	100.0%	89.1%	94.3%	88.5%
<b>Run/ Jog/ Fitness walk</b>	15.1%	7.4%	0.0%	9.1%	11.0%	6.8%
<b>Spa</b>	7.0%	6.1%	13.2%	0.0%	3.3%	3.4%
<b>Hiking/</b>	27.9%	32.2%	15.8%	21.8%	37.1%	25.7%
<b>Backpack/Camp</b>	4.4%	2.6%	42.1%	30.9%	2.7%	3.4%
<b>Agritourism</b>	19.3%	5.2%	0.0%	10.9%	13.3%	23.6%
<b>Sport event/ tournament</b>	1.5%	0.7%	13.2%	10.9%	0.0%	0.0%
<b>Park/ botanical garden</b>	32.0%	22.9%	13.2%	0.0%	33.6%	36.5%
<b>Waterpark</b>	11.5%	5.4%	0.0%	0.0%	4.1%	11.5%
<b>Mountain tube/ waterfall rappel</b>	0.7%	1.2%	0.0%	0.0%	0.6%	0.0%
<b>Zip-lining</b>	1.0%	2.7%	0.0%	0.0%	1.2%	0.0%
<b>Skydiving</b>	5.9%	4.1%	13.2%	0.0%	4.3%	0.0%
<b>All terrain vehicle (ATV)</b>	8.2%	3.9%	0.0%	0.0%	7.4%	14.9%
<b>Horseback riding</b>	8.7%	3.6%	0.0%	0.0%	1.2%	4.1%

# STATEWIDE - ACTIVITIES – RECREATION – CHINA

	2017	2018	2019
<b>TOTAL</b>	94.7%	94.1%	93.5%
<b>Run/ Jog/ Fitness walk</b>	22.4%	20.6%	13.7%
<b>Spa</b>	2.6%	5.5%	6.4%
<b>Hiking</b>	20.4%	13.7%	31.7%
<b>Backpack/Camp</b>	*	*	4.3%
<b>Agritourism</b>	24.5%	17.3%	17.1%
<b>Sport event/ tournament</b>	2.2%	1.7%	1.3%
<b>Park/ botanical garden</b>	50.2%	41.1%	32.1%
<b>Waterpark</b>	NA	13.1%	9.9%
<b>Mountain tube/ waterfall rappel</b>	NA	1.5%	0.8%
<b>Zip-lining</b>	NA	1.9%	1.3%
<b>Skydiving</b>	NA	10.9%	5.4%
<b>All terrain vehicle (ATV)</b>	NA	7.3%	7.9%
<b>Horseback riding</b>	NA	11.1%	6.6%

\* Combined with hiking

## ACTIVITIES – ENTERTAINMENT & DINING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	95.8%	97.5%	84.2%	80.0%	96.1%	92.6%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	55.5%	53.2%	55.3%	32.7%	54.3%	40.5%
<b>Live music/ stage show</b>	13.9%	18.3%	15.8%	9.1%	11.6%	10.8%
<b>Nightclub/ dancing/ bar/ karaoke</b>	11.9%	7.5%	0.0%	0.0%	6.2%	7.4%
<b>Fine dining</b>	52.4%	42.9%	13.2%	9.1%	34.5%	14.2%
<b>Family restaurant</b>	25.1%	15.8%	0.0%	9.1%	18.7%	14.9%
<b>Fast food</b>	44.8%	37.3%	42.1%	20.0%	44.9%	24.3%
<b>Food truck</b>	24.1%	19.4%	26.3%	52.7%	14.7%	25.0%
<b>Café/ coffee house</b>	36.9%	28.8%	31.5%	60.0%	28.5%	33.1%
<b>Ethnic dining</b>	23.8%	17.5%	13.2%	0.0%	16.3%	3.4%
<b>Prepared own meal</b>	20.7%	21.2%	28.9%	9.1%	18.9%	8.1%



# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – CHINA

	2017	2018	2019
<b>TOTAL</b>	95.5%	96.1%	95.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	56.3%	60.7%	56.6%
<b>Live music/ stage show</b>	24.3%	16.2%	14.9%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.7%	9.7%	10.7%
<b>Fine dining</b>	52.3%	47.6%	47.4%
<b>Family restaurant</b>	21.6%	19.1%	23.4%
<b>Fast food</b>	48.9%	43.5%	43.5%
<b>Food truck</b>	NA	18.4%	22.9%
<b>Café/ coffee house</b>	28.6%	37.3%	35.5%
<b>Ethnic dining</b>	20.4%	18.5%	22.1%
<b>Prepared own meal</b>	21.3%	18.0%	20.7%

## ACTIVITIES – SHOPPING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.8%	92.1%	68.5%	80.0%	94.4%	85.1%
<b>Mall/ department store</b>	70.4%	38.0%	0.0%	0.0%	50.8%	29.7%
<b>Designer boutique</b>	13.4%	7.6%	0.0%	41.8%	6.8%	0.0%
<b>Hotel/ resort store</b>	21.9%	24.6%	0.0%	30.9%	20.4%	17.6%
<b>Swap meet/ flea market</b>	5.7%	2.7%	13.2%	9.1%	4.4%	0.0%
<b>Discount/ outlet store</b>	47.0%	27.3%	0.0%	0.0%	30.4%	11.5%
<b>Supermarket</b>	62.3%	57.9%	26.3%	18.2%	59.6%	47.3%
<b>Farmer's market</b>	12.7%	11.8%	13.2%	10.9%	15.1%	6.8%
<b>Convenience store</b>	45.5%	30.2%	42.1%	40.0%	37.4%	36.5%
<b>Duty free store</b>	62.4%	29.5%	13.2%	41.8%	39.7%	3.4%
<b>Local shop/ artisan</b>	30.0%	25.4%	26.3%	10.9%	24.0%	26.3%

## STATEWIDE - ACTIVITIES – SHOPPING – CHINA

	2017	2018	2019
<b>TOTAL</b>	97.2%	93.9%	93.2%
<b>Mall/ department store</b>	78.7%	66.5%	62.3%
<b>Designer boutique</b>	13.7%	9.0%	11.8%
<b>Hotel/ resort store</b>	18.6%	24.7%	22.8%
<b>Swap meet/ flea market</b>	6.6%	4.4%	5.3%
<b>Discount/ outlet store</b>	34.0%	40.7%	41.7%
<b>Supermarket</b>	40.6%	62.2%	59.9%
<b>Farmer's market</b>	13.3%	13.1%	13.3%
<b>Convenience store</b>	44.3%	42.2%	42.2%
<b>Duty free store</b>	61.4%	50.7%	54.8%
<b>Local shop/ artisan</b>	29.7%	24.8%	29.4%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	80.3%	62.7%	68.5%	70.9%	79.1%	85.8%
<b>Historic military site</b>	49.4%	15.6%	42.1%	32.7%	37.7%	10.8%
<b>Other historical site</b>	25.4%	19.2%	26.3%	29.1%	31.9%	22.3%
<b>Museum/ art gallery</b>	23.2%	12.0%	13.2%	9.1%	17.9%	26.3%
<b>Luau/ Polynesian show/ hula show</b>	16.7%	17.1%	0.0%	0.0%	13.5%	10.8%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	11.0%	11.2%	0.0%	20.0%	9.9%	15.5%
<b>Play/ concert/ theatre</b>	4.4%	1.4%	28.9%	41.8%	1.5%	0.0%
<b>Art/ craft fair</b>	9.2%	14.3%	42.1%	43.6%	13.4%	11.5%
<b>Festival event</b>	1.4%	2.2%	0.0%	0.0%	2.3%	0.0%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

	2017	2018	2019
<b>TOTAL</b>	84.6%	80.9%	78.7%
<b>Historic military site</b>	67.6%	51.9%	43.0%
<b>Other historical site</b>	23.1%	28.6%	27.3%
<b>Museum/ art gallery</b>	23.9%	15.9%	21.8%
<b>Luau/ Polynesian show/ hula show</b>	17.9%	13.2%	16.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	3.5%	10.7%	11.7%
<b>Play/ concert/ theatre</b>	5.2%	3.8%	3.8%
<b>Art/ craft fair</b>	7.0%	11.7%	11.6%
<b>Festival event</b>	3.6%	1.8%	1.8%

## ACTIVITIES – TRANSPORTATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	82.1%	88.8%	68.5%	80.0%	90.9%	96.6%
<b>Airport shuttle</b>	13.0%	13.0%	0.0%	30.9%	14.0%	7.4%
<b>Trolley</b>	4.8%	4.9%	13.2%	10.9%	3.5%	0.0%
<b>Public bus</b>	17.2%	2.7%	26.3%	20.0%	14.0%	6.8%
<b>Tour bus/ tour van</b>	22.0%	14.2%	26.3%	9.1%	19.7%	23.0%
<b>Taxi/ limo</b>	22.6%	10.2%	13.2%	9.1%	17.5%	14.9%
<b>Rental car</b>	41.6%	57.4%	15.8%	41.8%	55.8%	55.4%
<b>Ride share</b>	15.5%	10.8%	0.0%	30.9%	14.6%	10.8%
<b>Bicycle rental</b>	2.3%	1.9%	0.0%	0.0%	2.3%	3.4%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – CHINA

	2017	2018	2019
<b>TOTAL</b>	98.1%	92.7%	84.4%
<b>Airport shuttle</b>	31.9%	19.5%	13.5%
<b>Trolley</b>	3.4%	8.0%	4.9%
<b>Public bus</b>	18.6%	18.8%	15.0%
<b>Tour bus/ tour van</b>	35.6%	24.6%	21.8%
<b>Taxi/ limo</b>	23.2%	24.6%	21.0%
<b>Rental car</b>	44.8%	51.9%	46.9%
<b>Ride share</b>	NA	14.7%	14.4%
<b>Bicycle rental</b>	NA	3.2%	2.4%

## ACTIVITIES – OTHER – CHINA

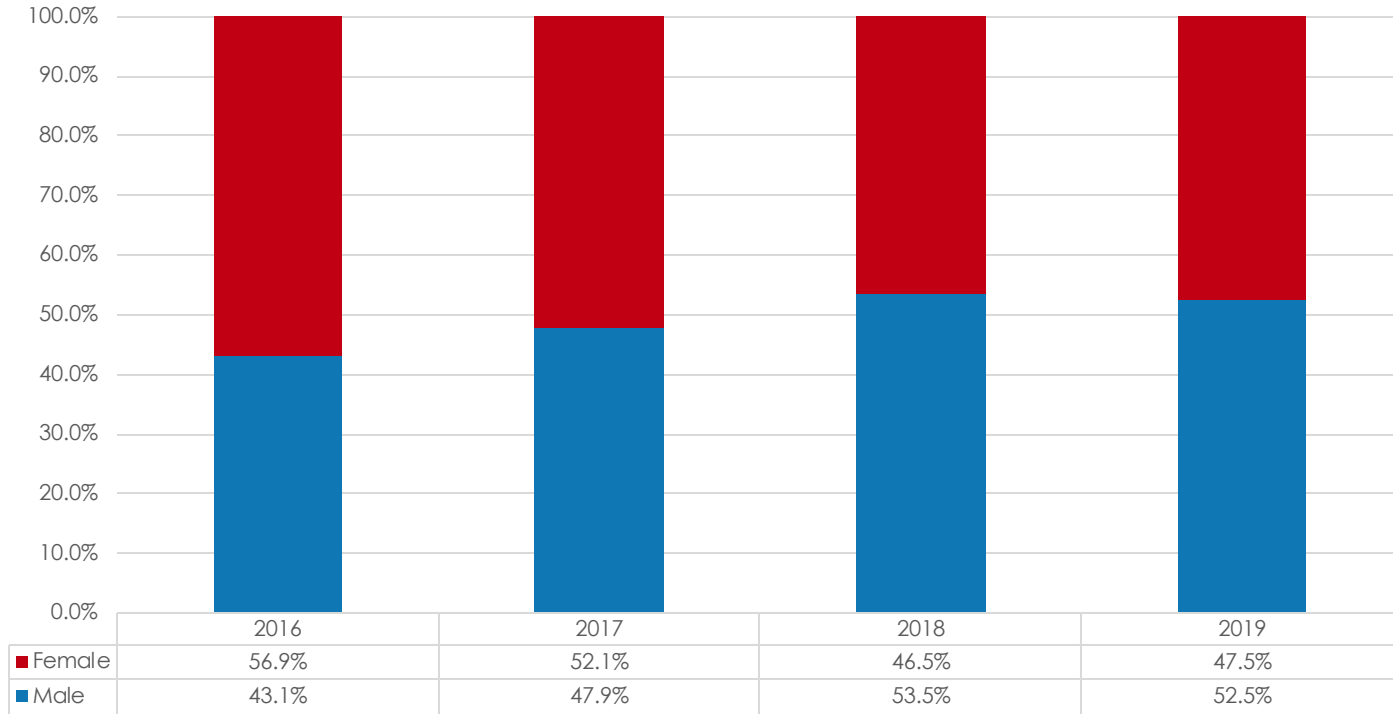
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	20.5%	12.2%	28.9%	52.7%	13.7%	12.2%
Visit friends/ family	18.3%	11.0%	28.9%	43.6%	11.4%	8.1%
Volunteer- non-profit	2.6%	2.0%	0.0%	9.1%	3.0%	4.1%



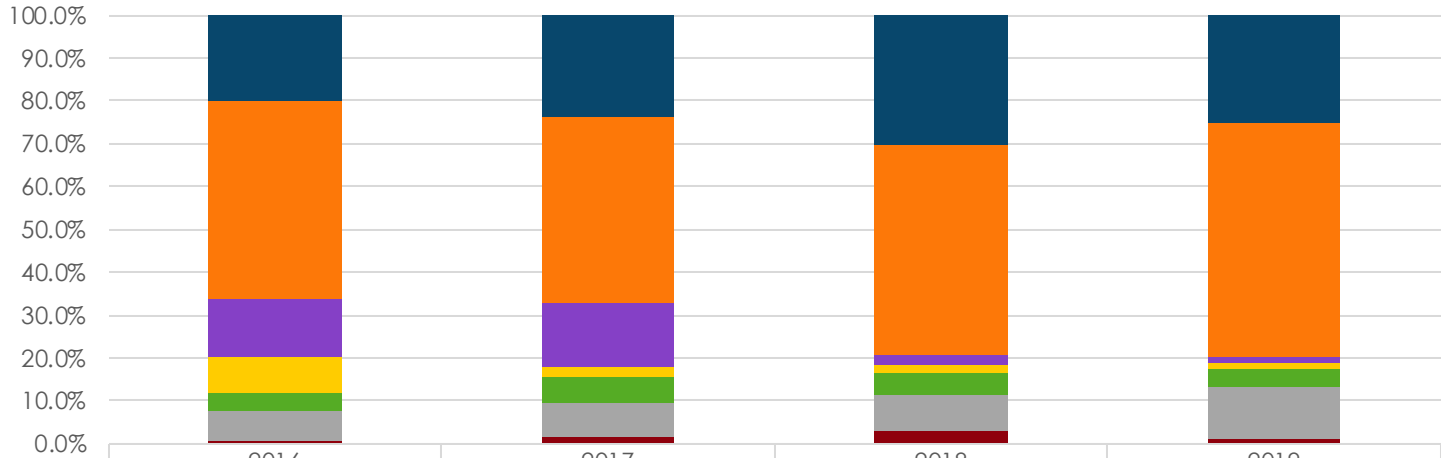
## ACTIVITIES – OTHER – CHINA

	2018	2019
<b>TOTAL</b>	19.6%	19.0%
<b>Visit friends/ family</b>	17.7%	16.9%
<b>Volunteer- non-profit</b>	2.5%	2.8%

# VISITOR PROFILE – GENDER – CHINA

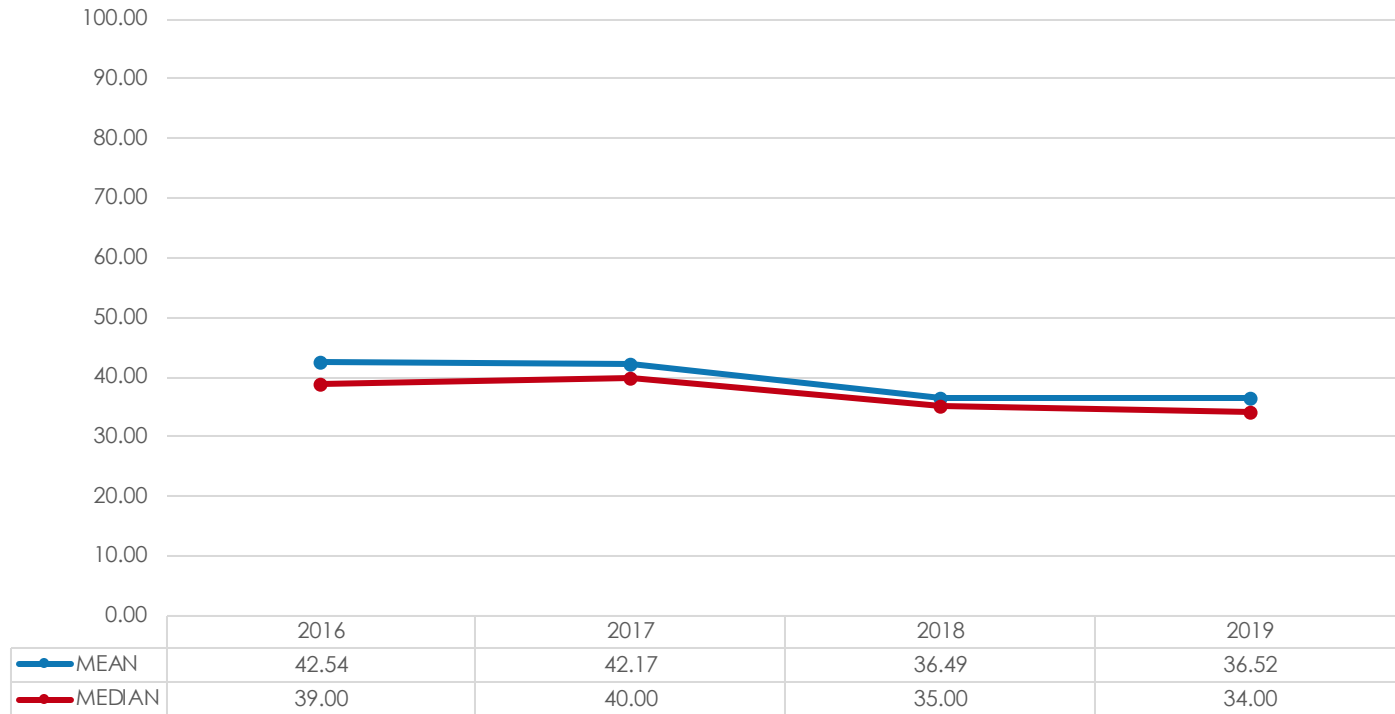


# VISITOR PROFILE – EDUCATION – CHINA

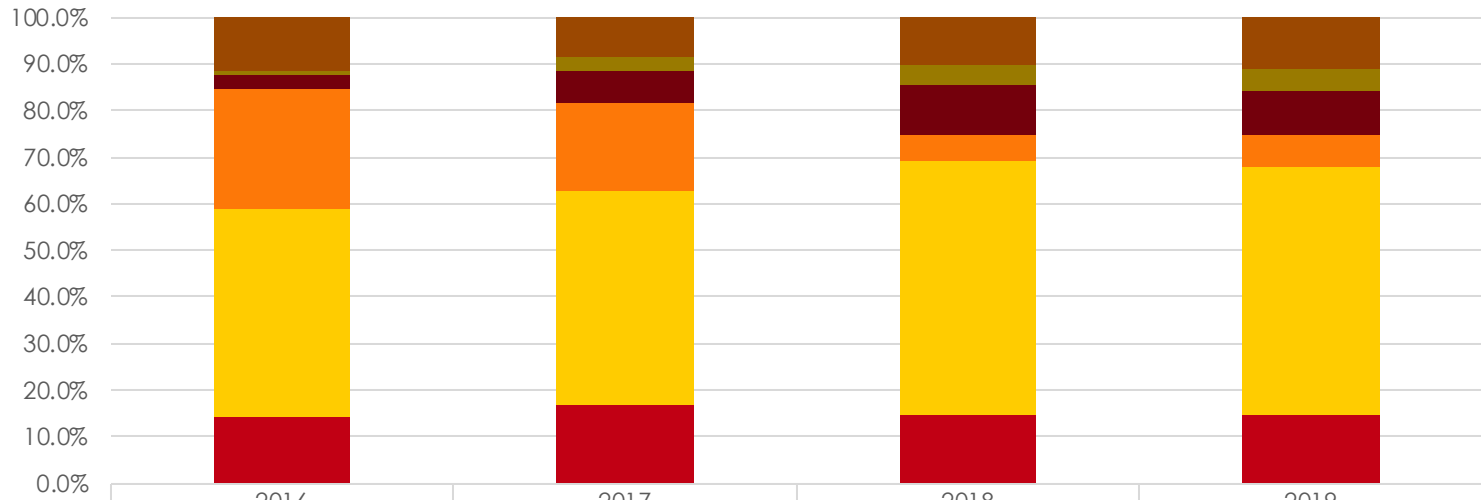


	2016	2017	2018	2019
■ Post-Graduate	20.1%	23.9%	30.4%	25.1%
■ College Grad	46.0%	43.4%	48.8%	54.6%
■ Associate Degree	13.7%	14.8%	2.3%	1.5%
■ Vocational/ Tech	8.5%	2.4%	2.0%	1.5%
■ Some College	4.2%	5.8%	5.2%	4.2%
■ H.S. Grad	6.7%	8.1%	8.5%	11.8%
■ Some / No H.S.	0.7%	1.6%	2.8%	1.3%

# VISITOR PROFILE – AGE – CHINA

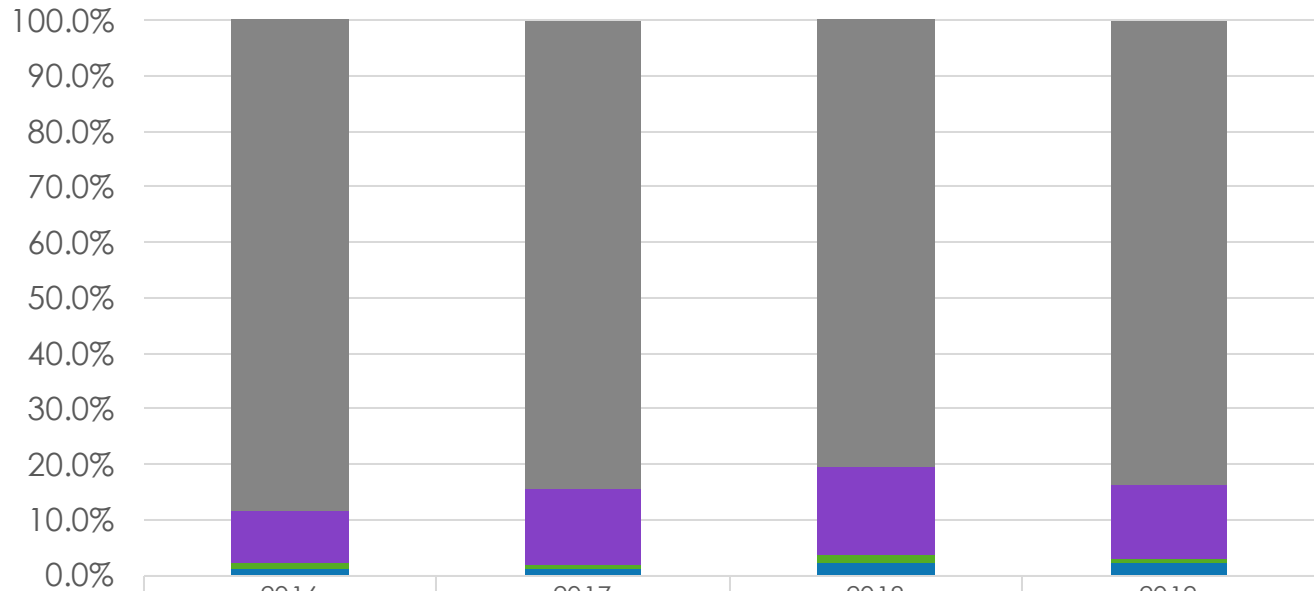


# VISITOR PROFILE – EMPLOYMENT STATUS – CHINA



	2016	2017	2018	2019
Other	11.5%	8.6%	10.4%	11.2%
Homemaker	0.8%	2.7%	4.3%	4.9%
Student	3.1%	7.0%	10.7%	9.2%
Retired	25.7%	18.9%	5.6%	7.1%
Employed	44.5%	46.0%	54.4%	53.2%
Self-employed	14.3%	16.7%	14.7%	14.6%

# VISITOR PROFILE – HAWAII PROPERTY OWNER – CHINA



	2016	2017	2018	2019
■ Do not nor plan to purchase	88.6%	84.6%	80.7%	83.8%
■ Plan to in future	9.4%	13.6%	15.8%	13.3%
■ Other Property Type	1.1%	0.6%	1.6%	0.7%
■ Timeshare	1.0%	1.2%	2.0%	2.2%

## VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

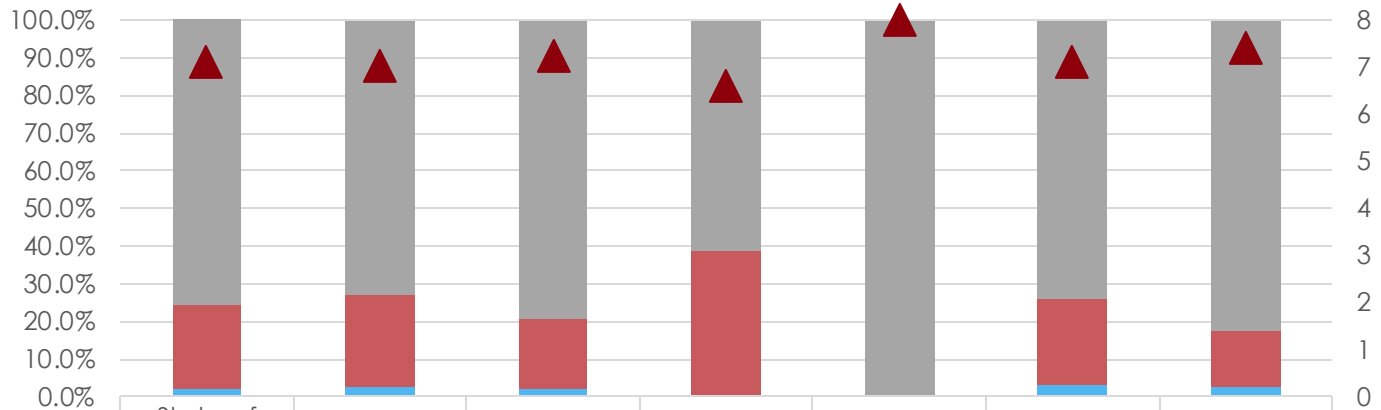
	2018	2019
< ¥250,799	30.4%	33.1%
¥250,800 - ¥376,099	23.0%	23.1%
¥376,100 - ¥501,399	15.4%	15.5%
¥501,400 - ¥626,799	8.0%	7.7%
¥626,800 - ¥783,499	5.4%	4.4%
¥783,500 - ¥940,199	6.3%	5.6%
¥940,200 - ¥1,096,899	2.8%	2.8%
¥1,096,900 - ¥1,253,599	3.2%	2.2%
¥1,253,600 - ¥1,560,799	1.8%	1.5%
¥1,560,800+	3.7%	4.3%

# SECTION – KOREA



# OVERALL SATISFACTION – MOST RECENT VISIT – KOREA

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	75.5%	73.0%	79.4%	61.5%	100.0%	74.1%	82.6%
■ Above Average (5-6)	22.6%	24.4%	18.5%	38.5%	0.0%	22.9%	15.0%
■ Below Average (3-4)	1.8%	2.2%	2.1%	0.0%	0.0%	3.0%	2.4%
■ Poor (1-2)	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	1,362	1,249	184	5	1	199	40
▲ MEAN	7.13	7.03	7.23	6.62	8.00	7.10	7.43

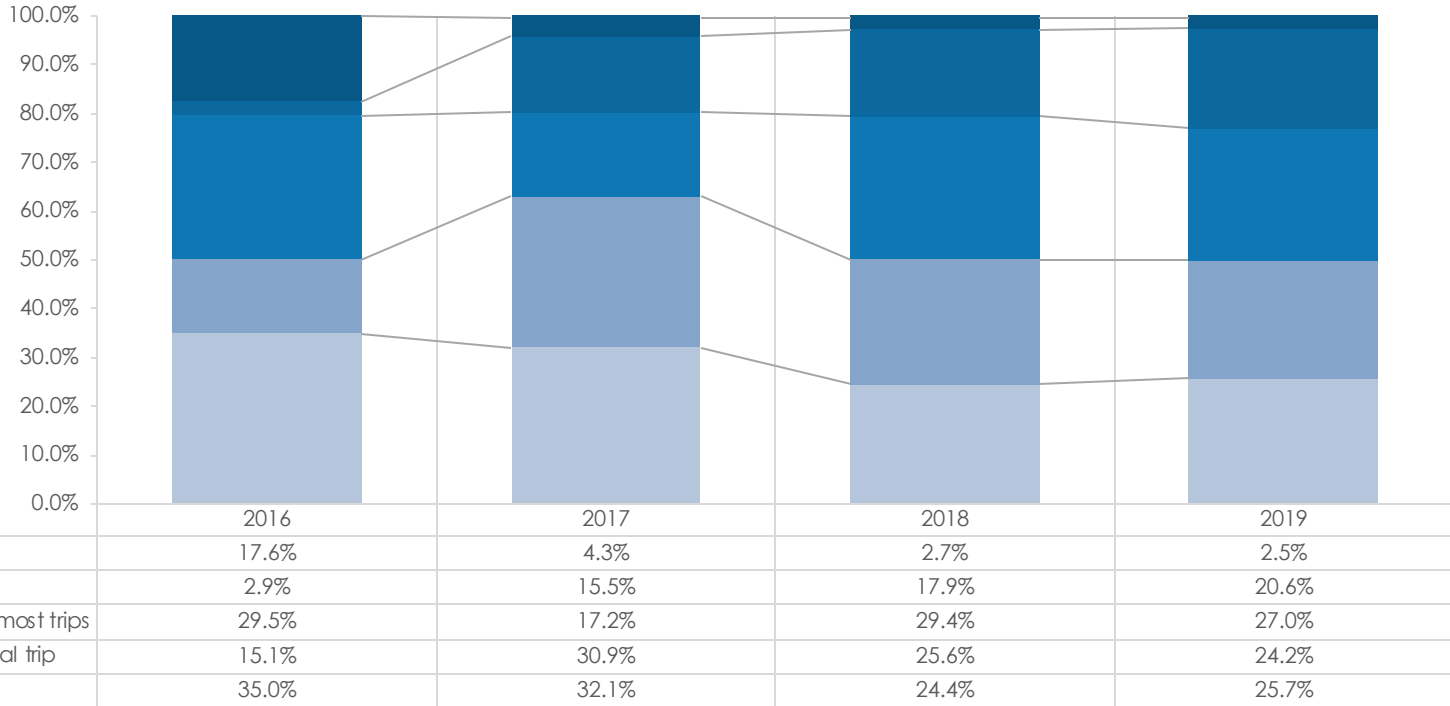
# PRIMARY TRIP PURPOSE KOREA

	2018	2019
Vacation	52.7%	52.3%
Honeymoon	28.9%	32.8%
Get married/ vow renewal	2.4%	3.0%
Anniversary/ birthday	3.8%	2.8%
Incentive/ Reward	3.1%	1.7%
Family gathering	2.7%	1.6%

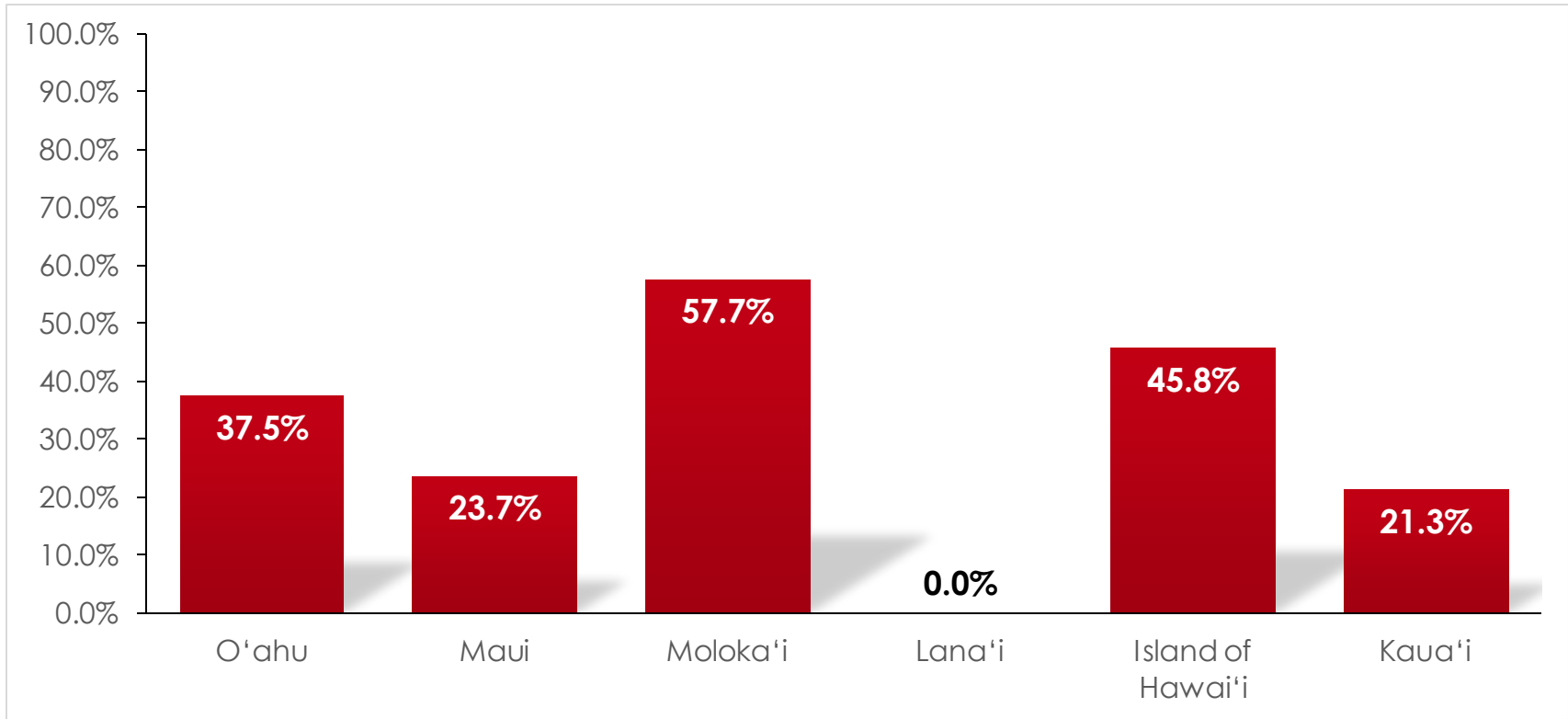
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE KOREA

	2018	2019
Vacation	80.0%	77.5%
Honeymoon	31.6%	36.2%
Shopping/ fashion	13.9%	14.9%
Anniversary/ birthday	11.2%	10.8%
Get married/ vow renewal	5.8%	7.6%
Incentive/ Reward	6.9%	4.0%
Family gathering/ reunion	2.7%	3.9%
Visit friends/ relatives	2.7%	2.5%
Business trip	2.7%	1.6%

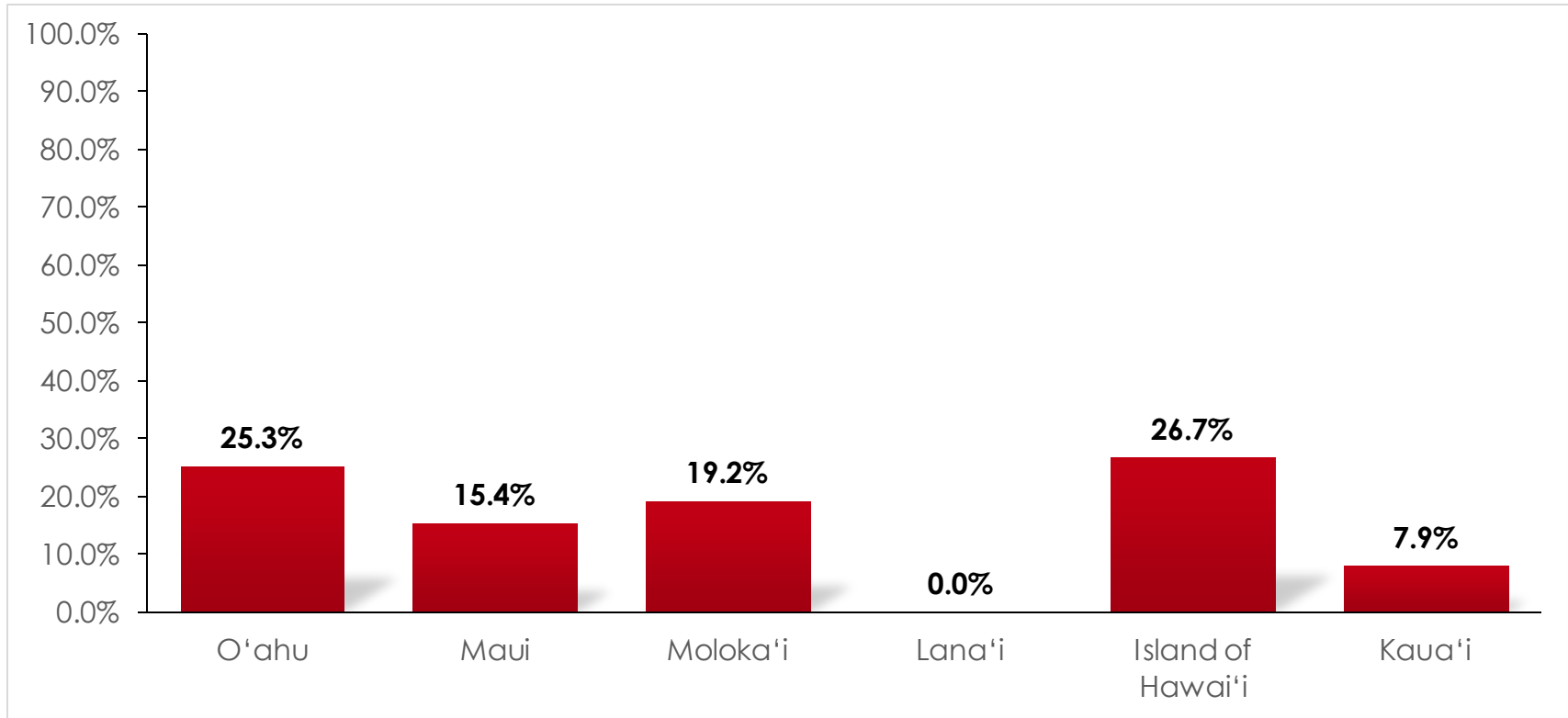
# VACATION TRIP DESCRIPTION – KOREA



# ADVERTISING AWARENESS – KOREA



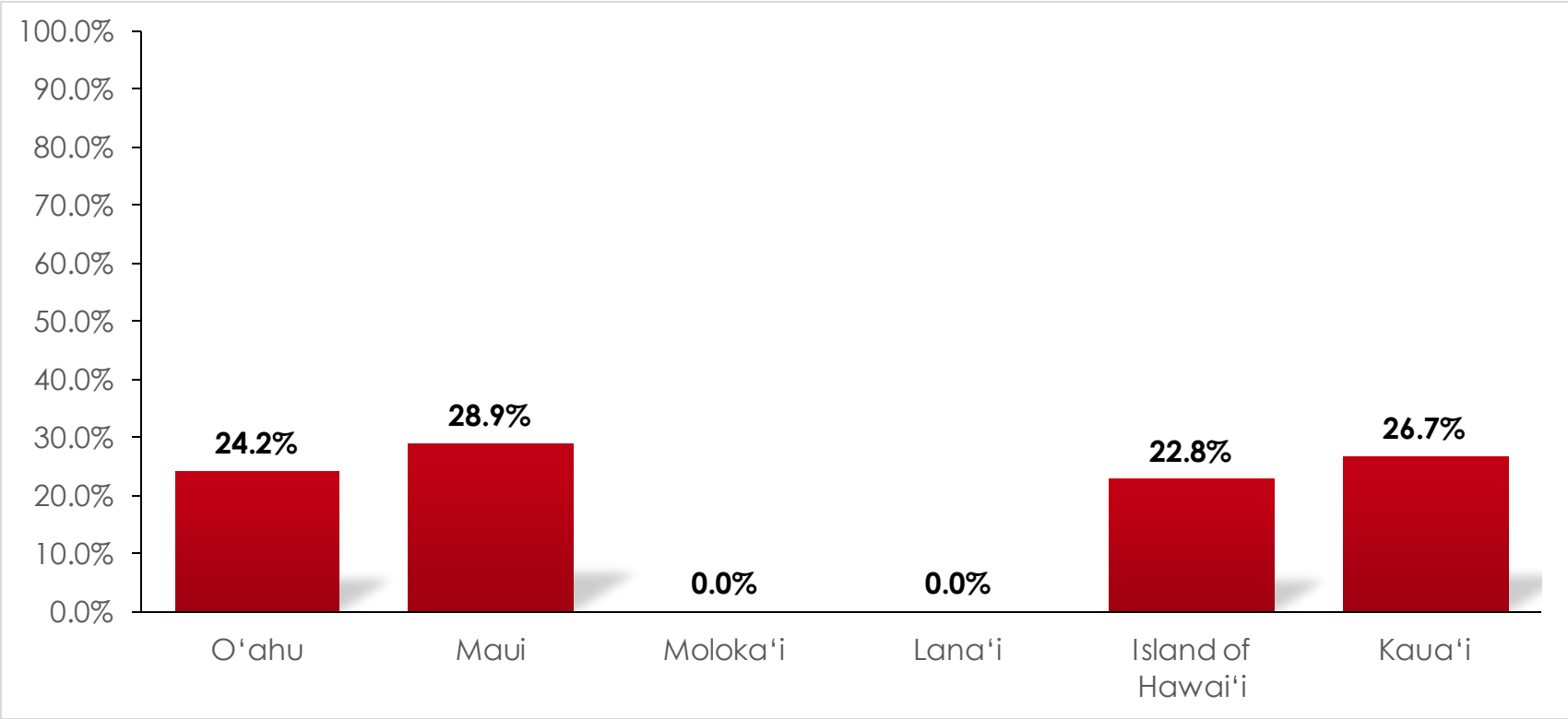
# IMPACT OF LOCATION FILMING – KOREA



# IMPACT OF HAWAIIAN MUSIC – KOREA

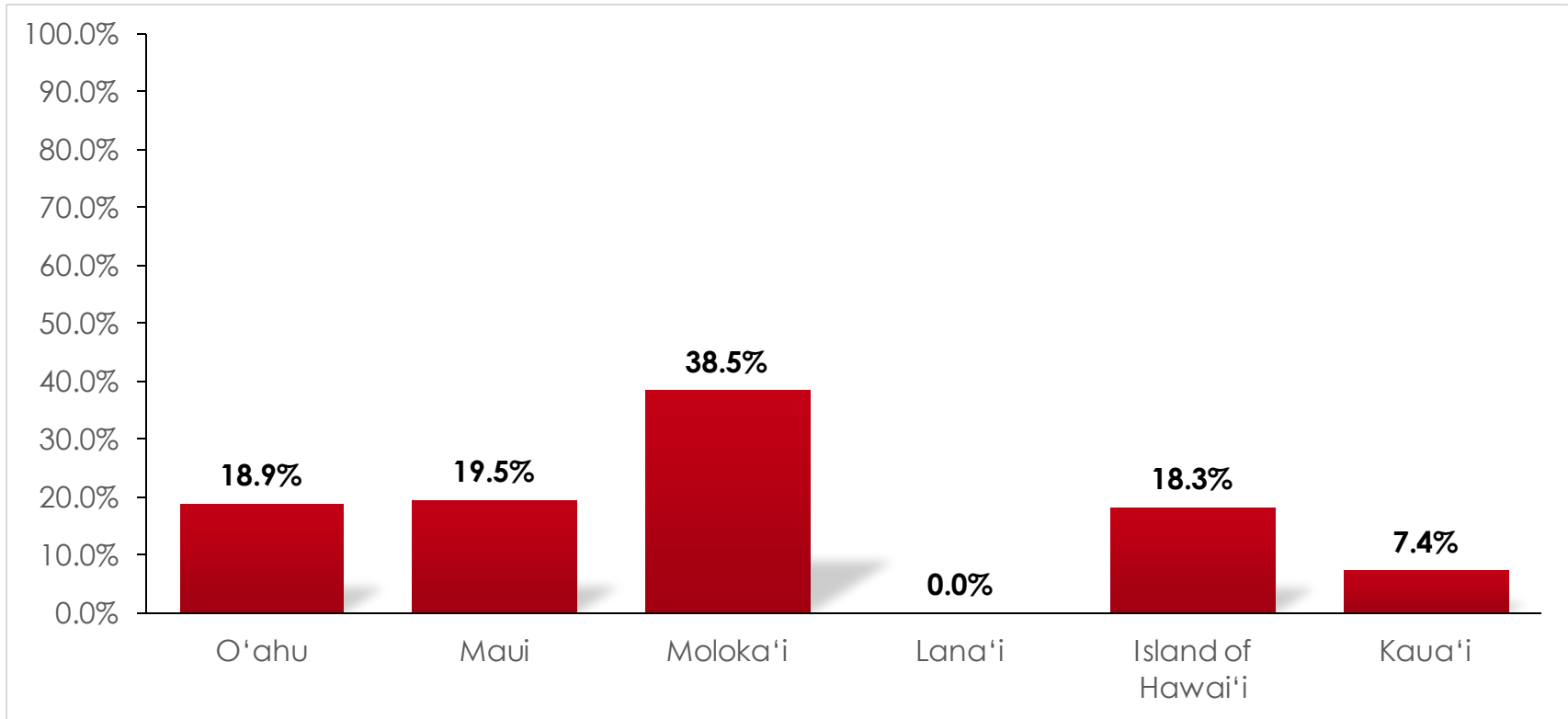


# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – KOREA

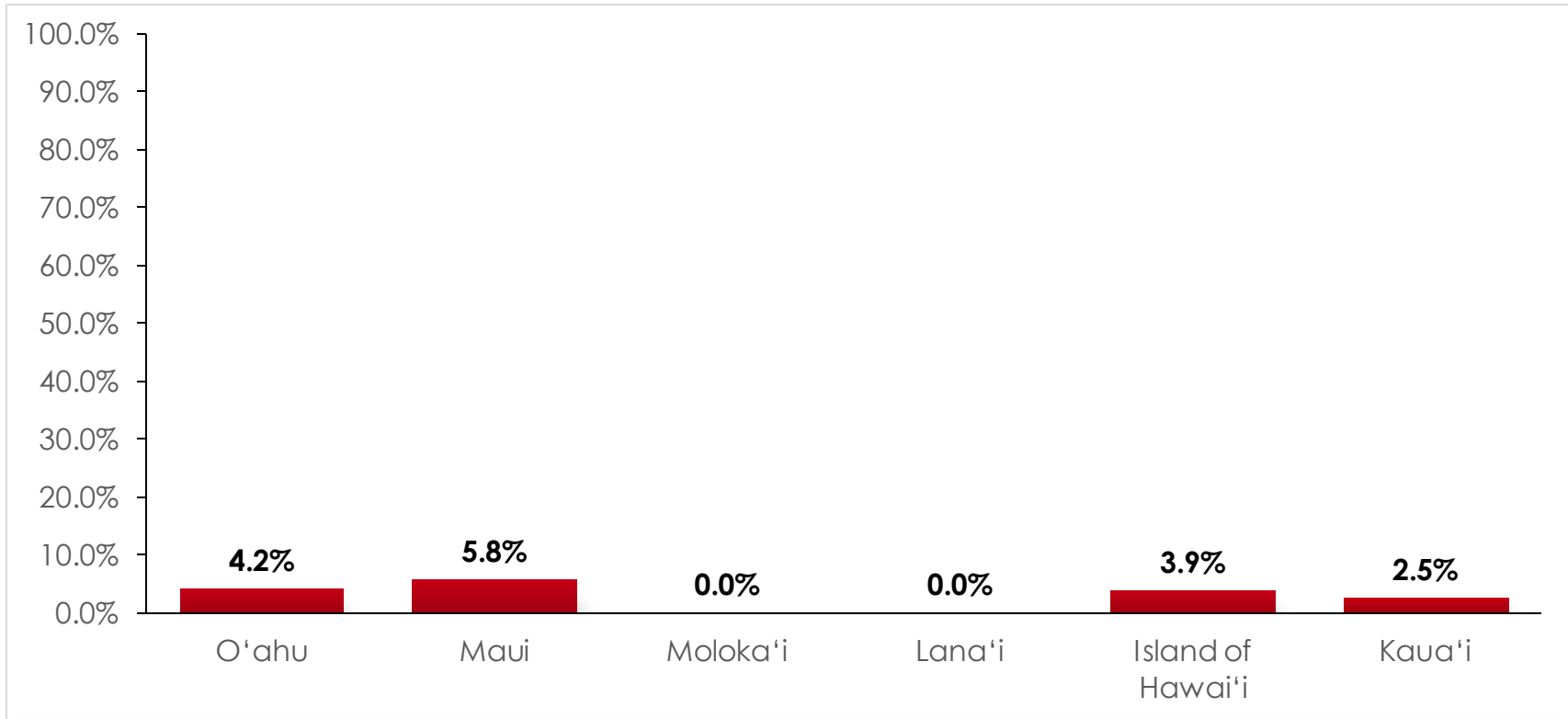




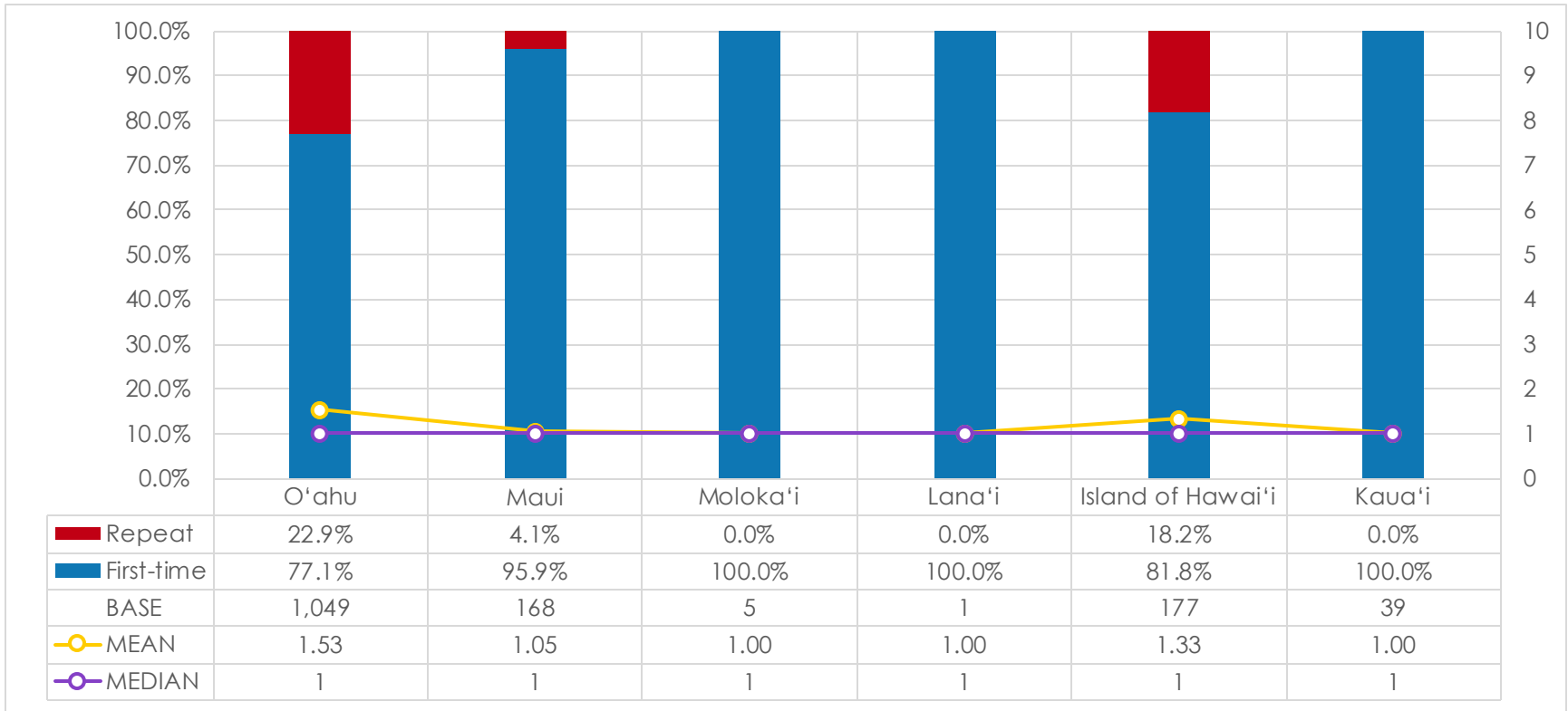
# IMPACT OF OUTDOOR/ SPORTING EVENTS – KOREA



# IMPACT OF HAWAIIAN CULTURAL EVENTS – KOREA



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – KOREA

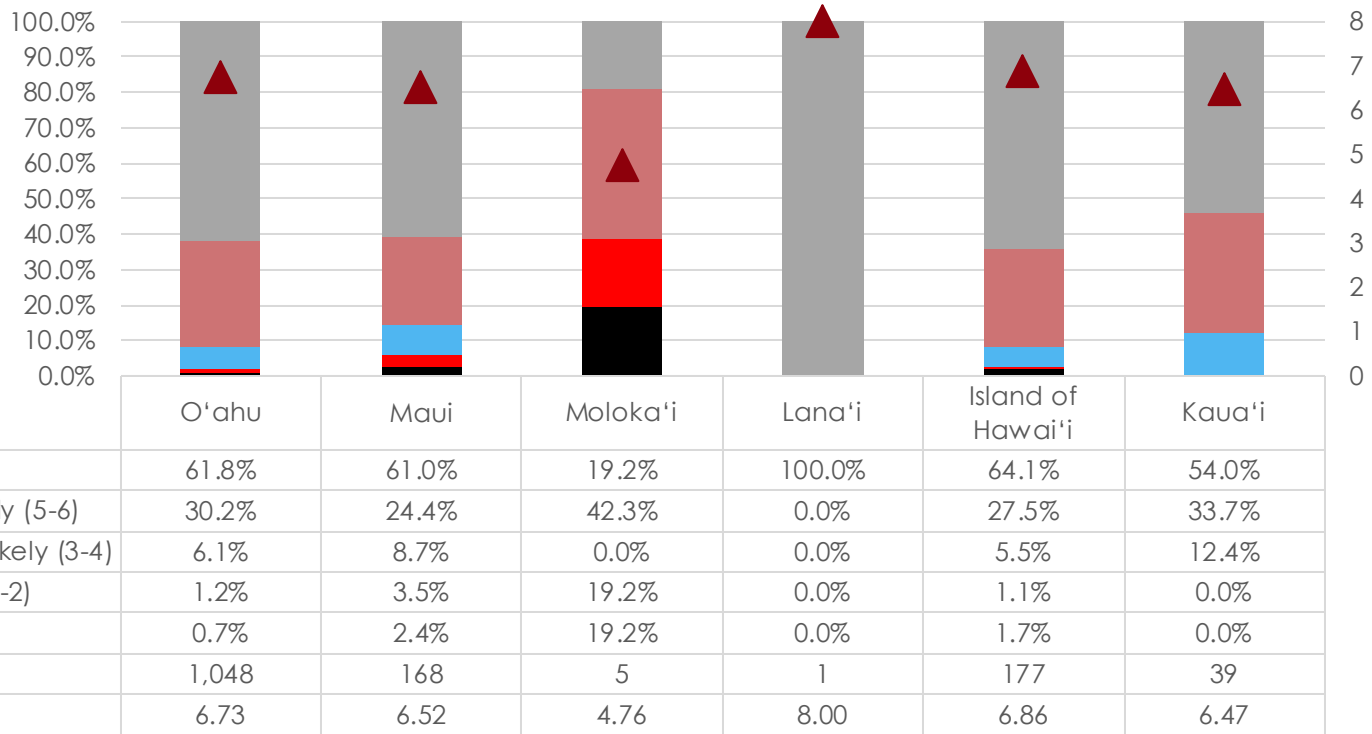


# TRAVEL PARTY MEMBERS – KOREA

	2016	2017	2018	2019
Spouse	65.0%	68.7%	62.0%	66.6%
Other adult family	18.2%	17.2%	16.4%	20.8%
Child under 18	11.6%	17.4%	14.6%	13.3%
Friends/ associates	13.8%	12.2%	14.2%	11.2%
Alone	4.5%	4.7%	3.1%	3.4%
Girlfriend/ boyfriend	3.5%	2.5%	7.4%	2.1%
Same-sex partner	.3%	.3%	0.2%	0.0%

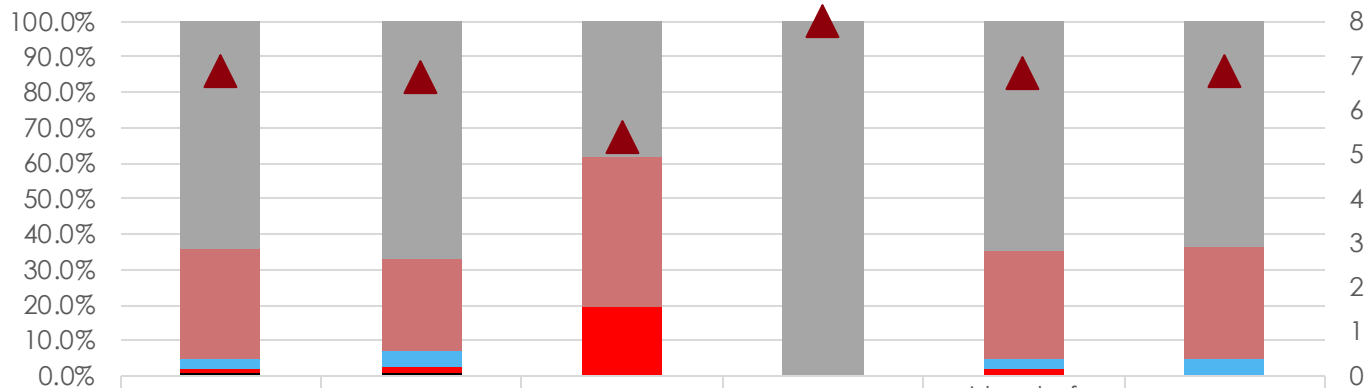
# LIKELIHOOD OF RETURN VISIT – KOREA

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



# BRAND/DESTINATION ADVOCACY – KOREA

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	64.3%	67.1%	38.5%	100.0%	64.4%	63.9%
■ Somewhat likely (5-6)	31.0%	25.8%	42.3%	0.0%	30.5%	31.2%
■ Somewhat unlikely (3-4)	2.9%	4.8%	0.0%	0.0%	3.3%	5.0%
■ Very unlikely (1-2)	0.7%	1.7%	19.2%	0.0%	1.2%	0.0%
■ Not sure	1.1%	0.6%	0.0%	0.0%	0.5%	0.0%
BASE	1,047	168	5	1	177	39
▲ MEAN	6.84	6.74	5.38	8.00	6.81	6.84

## ACTIVITIES – SIGHTSEEING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	97.5%	98.8%	100.0%	0.0%	93.4%	97.5%
<b>On own (self-guided)</b>	76.4%	82.1%	76.2%	0.0%	68.8%	51.0%
<b>Helicopter/ airplane</b>	3.1%	2.4%	28.5%	0.0%	7.0%	7.9%
<b>Boat/ submarine/ whale</b>	16.8%	17.4%	23.8%	0.0%	15.4%	7.4%
<b>Visit towns</b>	36.2%	22.6%	0.0%	0.0%	37.1%	14.9%
<b>Limo/ van/ bus tour</b>	17.2%	7.6%	0.0%	0.0%	12.4%	25.7%
<b>Scenic views/ natural landmark</b>	53.6%	50.5%	0.0%	0.0%	52.5%	56.4%
<b>Movie/ TV/ film location</b>	17.4%	4.3%	23.8%	0.0%	12.9%	19.8%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - KOREA

	2017	2018	2019
<b>TOTAL</b>	98.6%	95.6%	97.3%
<b>On own (self-guided)</b>	72.7%	76.9%	76.0%
<b>Helicopter/ airplane</b>	8.2%	5.4%	3.8%
<b>Boat/ submarine/ whale</b>	13.4%	16.2%	16.9%
<b>Visit towns</b>	14.4%	35.3%	34.9%
<b>Limo/ van/ bus tour</b>	20.3%	15.3%	15.8%
<b>Scenic views/ natural landmark</b>	53.1%	53.3%	53.3%
<b>Movie/ TV/ film location</b>	13.0%	12.8%	16.1%



# ACTIVITIES – RECREATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.8%	95.9%	100.0%	100.0%	98.9%	84.2%
<b>Beach/ sunbathing</b>	77.8%	63.8%	28.5%	100.0%	67.2%	51.5%
<b>Bodyboard/ Standup paddle board</b>	7.0%	3.5%	0.0%	0.0%	9.4%	2.5%
<b>Surfing</b>	12.1%	7.9%	23.8%	0.0%	16.1%	7.9%
<b>Canoeing/ kayak</b>	5.8%	2.3%	23.8%	0.0%	6.7%	2.5%
<b>Swim- ocean</b>	47.1%	31.5%	28.5%	100.0%	44.3%	18.3%
<b>Snorkel</b>	46.9%	35.8%	47.6%	0.0%	46.4%	22.8%
<b>Windsurf/ Kitesurf</b>	0.7%	0.0%	0.0%	0.0%	1.9%	0.0%
<b>Jet ski/ Parasail</b>	5.9%	0.6%	23.8%	0.0%	3.8%	2.5%
<b>Scuba</b>	3.8%	1.2%	0.0%	0.0%	3.3%	2.5%
<b>Fishing</b>	1.2%	0.0%	0.0%	0.0%	4.0%	0.0%
<b>Golf</b>	2.3%	3.1%	0.0%	0.0%	5.9%	3.0%

# STATEWIDE - ACTIVITIES – RECREATION – KOREA

	2017	2018	2019
<b>TOTAL</b>	94.7%	97.9%	98.4%
<b>Beach/ sunbathing</b>	71.8%	78.5%	75.2%
<b>Bodyboard/ Standup paddle board</b>	9.5%	6.7%	7.0%
<b>Surfing</b>	11.6%	10.7%	12.3%
<b>Canoeing/ kayak</b>	6.1%	4.7%	5.8%
<b>Swim- ocean</b>	NA	49.0%	45.3%
<b>Snorkel</b>	NA	45.4%	45.5%
<b>Windsurf/ Kitesurf</b>	1.0%	1.3%	0.7%
<b>Jet ski/ Parasail</b>	7.7%	5.7%	5.2%
<b>Scuba</b>	3.9%	3.9%	3.5%
<b>Fishing</b>	2.2%	1.6%	1.5%
<b>Golf</b>	3.5%	3.6%	3.0%

# ACTIVITIES – RECREATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	98.8%	95.9%	100.0%	100.0%	98.9%	84.2%
<b>Run/ Jog/ Fitness walk</b>	10.1%	3.1%	0.0%	0.0%	9.0%	2.5%
<b>Spa</b>	7.6%	7.8%	0.0%	0.0%	6.2%	5.0%
<b>Hiking/</b>	21.1%	20.0%	28.5%	0.0%	21.8%	12.9%
<b>Backpack/Camp</b>	1.4%	2.4%	0.0%	0.0%	3.0%	2.5%
<b>Agritourism</b>	21.2%	7.8%	23.8%	0.0%	28.1%	30.2%
<b>Sport event/ tournament</b>	1.2%	1.2%	0.0%	0.0%	2.8%	0.0%
<b>Park/ botanical garden</b>	24.5%	19.6%	0.0%	0.0%	31.0%	9.9%
<b>Waterpark</b>	2.2%	3.6%	0.0%	0.0%	6.2%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.4%	1.9%	0.0%	0.0%	2.2%	0.0%
<b>Zip-lining</b>	1.2%	0.0%	0.0%	0.0%	1.2%	2.5%
<b>Skydiving</b>	2.9%	0.6%	0.0%	0.0%	4.5%	0.0%
<b>All terrain vehicle (ATV)</b>	12.6%	0.6%	0.0%	100.0%	6.6%	5.0%
<b>Horseback riding</b>	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – KOREA

	2017	2018	2019
<b>TOTAL</b>	94.7%	97.9%	98.4%
<b>Run/ Jog/ Fitness walk</b>	6.8%	8.7%	9.2%
<b>Spa</b>	6.4%	6.0%	7.7%
<b>Hiking</b>	13.9%	13.5%	21.6%
<b>Backpack/Camp</b>	*	*	1.8%
<b>Agritourism</b>	18.8%	19.3%	21.3%
<b>Sport event/ tournament</b>	2.3%	2.1%	1.5%
<b>Park/ botanical garden</b>	23.6%	25.3%	24.9%
<b>Waterpark</b>	NA	3.9%	2.9%
<b>Mountain tube/ waterfall rappel</b>	NA	1.4%	0.8%
<b>Zip-lining</b>	NA	1.6%	1.2%
<b>Skydiving</b>	NA	3.5%	2.9%
<b>All terrain vehicle (ATV)</b>	NA	6.6%	10.8%
<b>Horseback riding</b>	NA	3.4%	1.0%

## ACTIVITIES – ENTERTAINMENT & DINING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	98.5%	96.5%	100.0%	100.0%	97.7%	89.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	36.0%	33.7%	71.5%	100.0%	32.5%	12.9%
<b>Live music/ stage show</b>	14.6%	11.4%	23.8%	0.0%	14.8%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.8%	1.2%	28.5%	0.0%	1.1%	0.0%
<b>Fine dining</b>	52.3%	37.3%	28.5%	0.0%	35.5%	7.9%
<b>Family restaurant</b>	38.9%	28.3%	28.5%	0.0%	33.4%	20.8%
<b>Fast food</b>	60.3%	36.5%	23.8%	0.0%	53.7%	54.0%
<b>Food truck</b>	58.4%	22.3%	23.8%	0.0%	34.9%	30.7%
<b>Café/ coffee house</b>	59.4%	35.4%	23.8%	0.0%	48.9%	25.7%
<b>Ethnic dining</b>	27.2%	20.7%	23.8%	0.0%	23.2%	12.4%
<b>Prepared own meal</b>	12.6%	11.8%	0.0%	0.0%	23.8%	7.4%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – KOREA

	2017	2018	2019
<b>TOTAL</b>	97.5%	98.8%	98.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	47.5%	37.0%	35.8%
<b>Live music/ stage show</b>	15.3%	15.1%	14.5%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.4%	9.0%	4.0%
<b>Fine dining</b>	49.7%	55.2%	48.3%
<b>Family restaurant</b>	50.0%	37.6%	37.0%
<b>Fast food</b>	54.8%	50.2%	57.4%
<b>Food truck</b>	NA	47.5%	52.1%
<b>Café/ coffee house</b>	48.6%	54.4%	56.0%
<b>Ethnic dining</b>	25.6%	24.6%	26.3%
<b>Prepared own meal</b>	16.3%	11.3%	13.8%

## ACTIVITIES – SHOPPING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	99.0%	92.4%	52.4%	100.0%	96.5%	75.8%
<b>Mall/ department store</b>	84.0%	35.4%	52.4%	0.0%	68.4%	19.8%
<b>Designer boutique</b>	4.9%	2.0%	0.0%	0.0%	2.2%	0.0%
<b>Hotel/ resort store</b>	32.2%	16.1%	23.8%	100.0%	18.8%	7.9%
<b>Swap meet/ flea market</b>	3.3%	0.0%	0.0%	0.0%	3.3%	0.0%
<b>Discount/ outlet store</b>	67.9%	40.1%	28.5%	0.0%	51.3%	12.4%
<b>Supermarket</b>	60.3%	43.3%	52.4%	0.0%	52.2%	43.1%
<b>Farmer's market</b>	9.0%	1.9%	0.0%	0.0%	16.1%	3.0%
<b>Convenience store</b>	54.0%	27.9%	52.4%	0.0%	43.7%	20.3%
<b>Duty free store</b>	48.4%	12.0%	28.5%	0.0%	40.5%	5.0%
<b>Local shop/ artisan</b>	15.7%	12.0%	23.8%	0.0%	16.9%	14.9%

## STATEWIDE - ACTIVITIES – SHOPPING – KOREA

	2017	2018	2019
<b>TOTAL</b>	97.7%	97.1%	97.4%
<b>Mall/ department store</b>	77.8%	77.2%	76.7%
<b>Designer boutique</b>	4.4%	4.6%	4.3%
<b>Hotel/ resort store</b>	26.4%	30.2%	28.8%
<b>Swap meet/ flea market</b>	6.2%	3.6%	2.9%
<b>Discount/ outlet store</b>	72.4%	61.6%	62.1%
<b>Supermarket</b>	52.5%	57.1%	57.5%
<b>Farmer's market</b>	7.2%	10.3%	9.1%
<b>Convenience store</b>	48.9%	43.3%	49.4%
<b>Duty free store</b>	40.1%	45.8%	43.7%
<b>Local shop/ artisan</b>	16.0%	14.7%	15.5%



## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	64.4%	50.7%	76.2%	0.0%	73.7%	53.5%
<b>Historic military site</b>	16.8%	6.6%	28.5%	0.0%	16.0%	2.5%
<b>Other historical site</b>	26.8%	26.7%	23.8%	0.0%	36.2%	30.2%
<b>Museum/ art gallery</b>	7.3%	2.4%	52.4%	0.0%	7.3%	5.4%
<b>Luau/ Polynesian show/ hula show</b>	23.2%	12.5%	52.4%	0.0%	27.2%	5.0%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	5.3%	4.2%	23.8%	0.0%	4.6%	2.5%
<b>Play/ concert/ theatre</b>	5.1%	0.0%	0.0%	0.0%	8.3%	0.0%
<b>Art/ craft fair</b>	4.1%	3.2%	0.0%	0.0%	3.4%	10.9%
<b>Festival event</b>	1.4%	1.7%	0.0%	0.0%	1.1%	0.0%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

	2017	2018	2019
<b>TOTAL</b>	60.9%	66.4%	64.6%
<b>Historic military site</b>	18.0%	18.9%	15.5%
<b>Other historical site</b>	28.6%	28.6%	28.9%
<b>Museum/ art gallery</b>	8.4%	7.3%	7.1%
<b>Luau/ Polynesian show/ hula show</b>	24.1%	21.9%	22.6%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	2.9%	5.2%	5.4%
<b>Play/ concert/ theatre</b>	3.0%	4.7%	4.9%
<b>Art/ craft fair</b>	5.8%	5.9%	4.3%
<b>Festival event</b>	1.1%	2.7%	1.5%

## ACTIVITIES – TRANSPORTATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	95.0%	95.9%	76.2%	100.0%	94.7%	95.0%
<b>Airport shuttle</b>	17.0%	7.7%	0.0%	100.0%	17.4%	5.0%
<b>Trolley</b>	27.6%	3.0%	0.0%	0.0%	17.2%	0.0%
<b>Public bus</b>	13.1%	2.3%	0.0%	0.0%	7.1%	2.5%
<b>Tour bus/ tour van</b>	34.7%	15.4%	47.6%	0.0%	32.2%	58.9%
<b>Taxi/ limo</b>	22.6%	8.8%	23.8%	0.0%	24.6%	2.5%
<b>Rental car</b>	53.3%	72.8%	28.5%	0.0%	49.0%	31.2%
<b>Ride share</b>	13.8%	3.6%	0.0%	0.0%	7.2%	2.5%
<b>Bicycle rental</b>	1.5%	0.0%	0.0%	0.0%	1.8%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – KOREA

	2017	2018	2019
<b>TOTAL</b>	98.8%	95.5%	95.0%
<b>Airport shuttle</b>	18.8%	15.9%	16.2%
<b>Trolley</b>	30.2%	21.8%	23.4%
<b>Public bus</b>	15.5%	12.2%	11.3%
<b>Tour bus/ tour van</b>	35.0%	30.7%	33.4%
<b>Taxi/ limo</b>	21.5%	20.7%	21.3%
<b>Rental car</b>	61.1%	62.0%	54.6%
<b>Ride share</b>	NA	7.4%	12.0%
<b>Bicycle rental</b>	NA	1.3%	1.3%

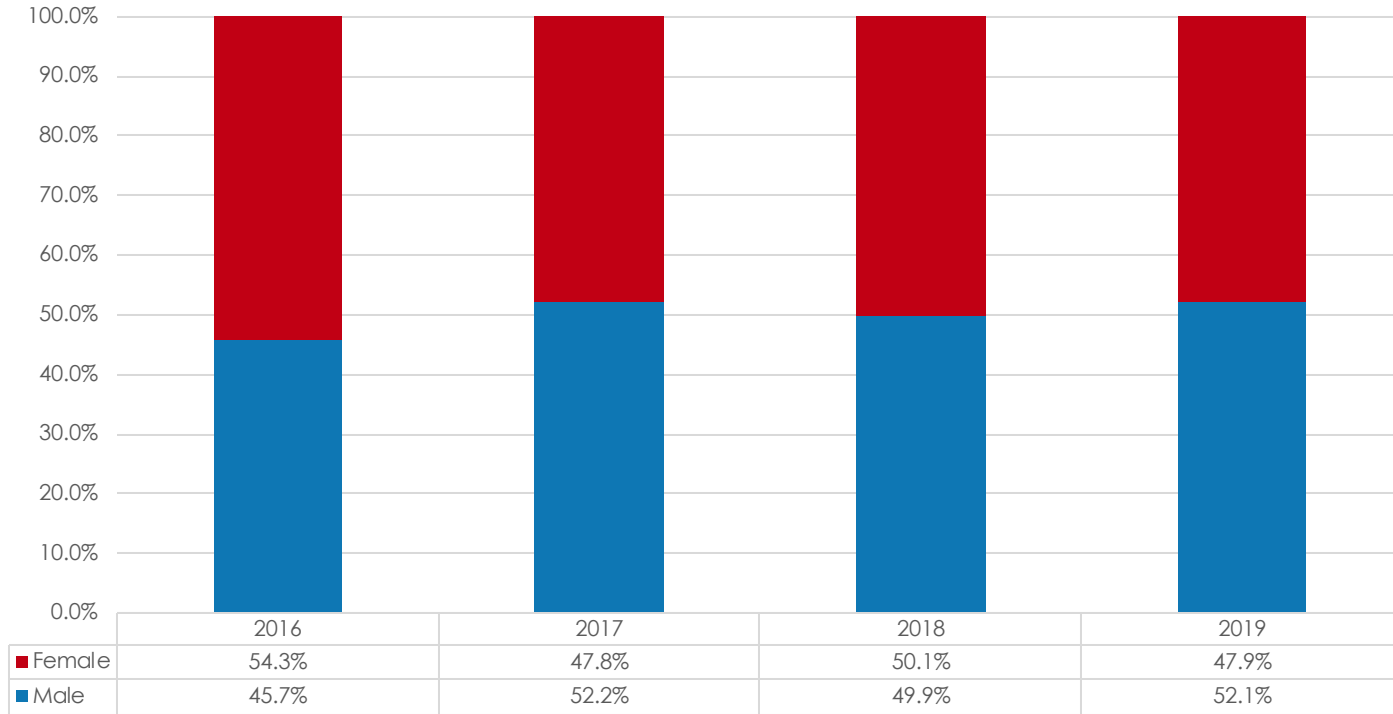
## ACTIVITIES – OTHER – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	16.9%	18.2%	28.5%	0.0%	26.3%	12.9%
Visit friends/ family	16.1%	17.7%	28.5%	0.0%	24.3%	12.9%
Volunteer- non-profit	0.8%	1.2%	0.0%	0.0%	2.0%	0.0%

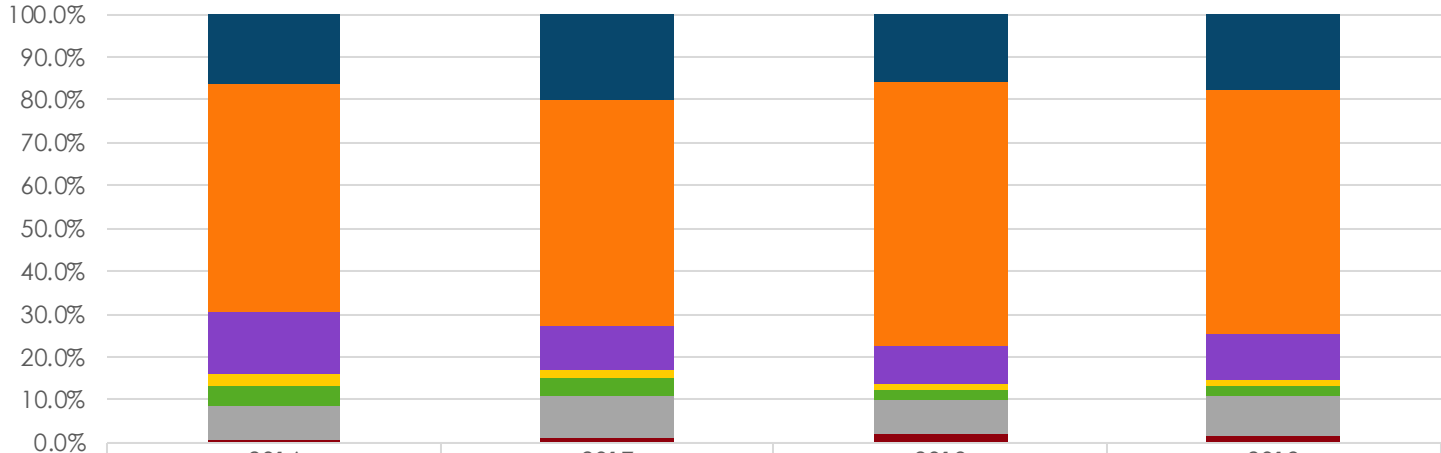
## ACTIVITIES – OTHER – KOREA

	2018	2019
<b>TOTAL</b>	16.2%	18.7%
<b>Visit friends/ family</b>	14.6%	17.7%
<b>Volunteer- non-profit</b>	1.8%	1.0%

# VISITOR PROFILE – GENDER – KOREA



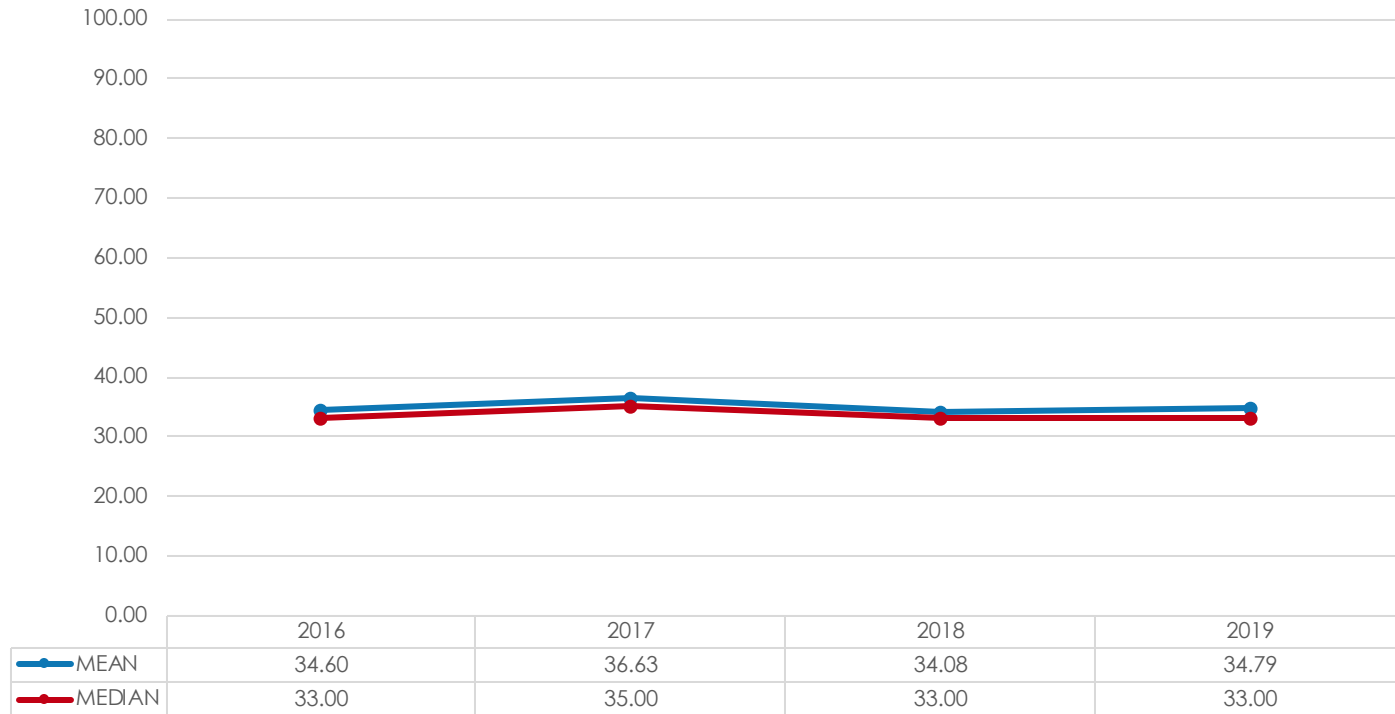
# VISITOR PROFILE – EDUCATION – KOREA



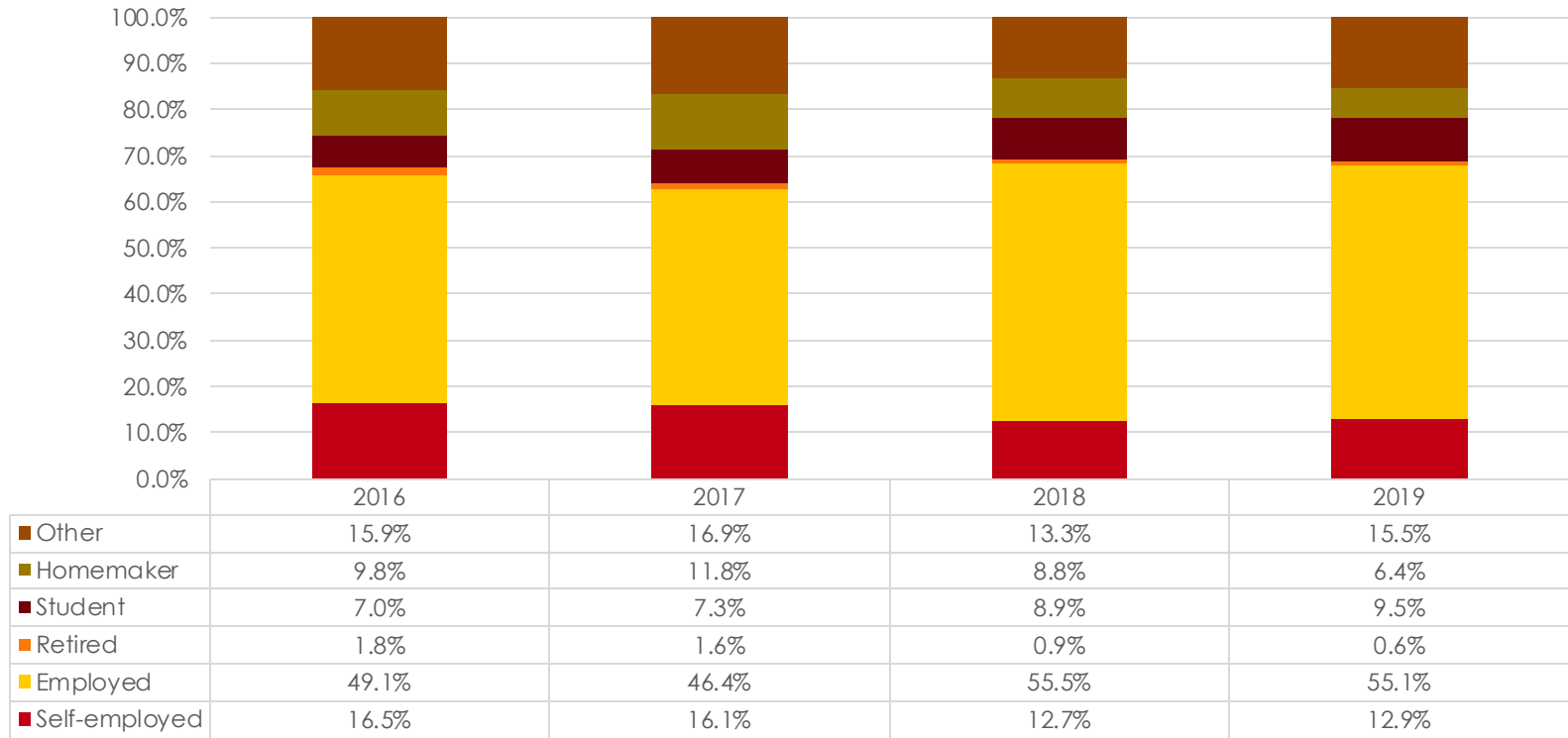
	2016	2017	2018	2019
■ Post-Graduate	16.5%	20.1%	15.8%	17.8%
■ College Grad	53.2%	52.6%	61.5%	56.8%
■ Associate Degree	14.4%	10.2%	9.2%	11.0%
■ Vocational/ Tech	2.8%	2.0%	1.1%	1.0%
■ Some College	4.7%	4.3%	2.6%	2.7%
■ H.S. Grad	7.7%	9.6%	7.6%	9.2%
■ Some / No H.S.	0.7%	1.2%	2.2%	1.5%



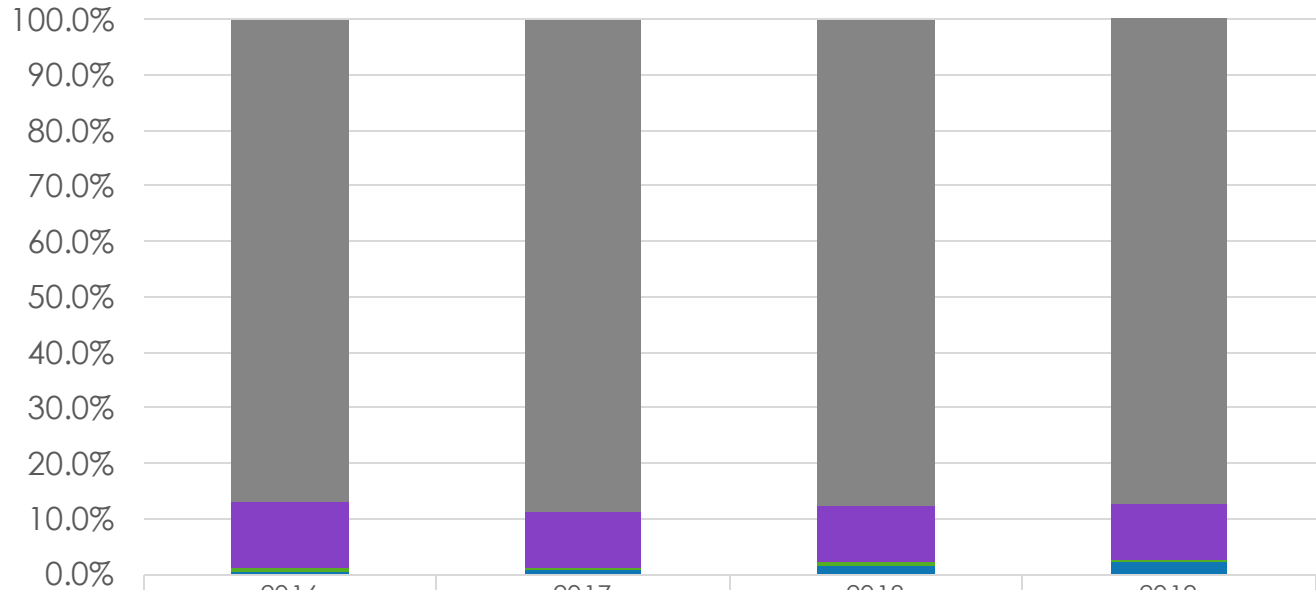
# VISITOR PROFILE – AGE – KOREA



# VISITOR PROFILE – EMPLOYMENT STATUS – KOREA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – KOREA



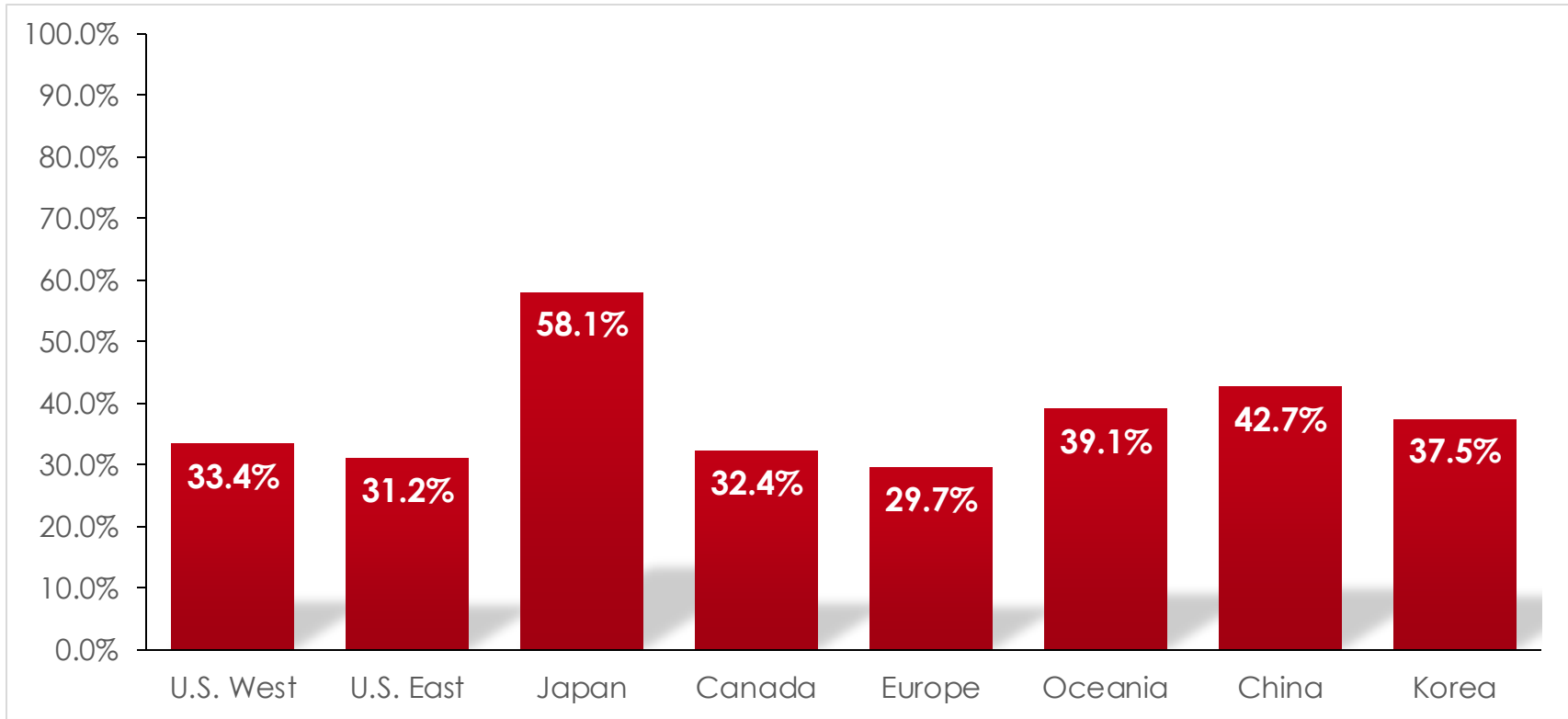
	2016	2017	2018	2019
■ Do not nor plan to purchase	87.0%	88.8%	87.7%	87.6%
■ Plan to in future	11.9%	10.1%	9.9%	9.8%
■ Other Property Type	0.6%	0.3%	0.7%	0.4%
■ Timeshare	0.4%	0.8%	1.6%	2.3%

# VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	2018	2019
< ₩16,305,000	16.0%	13.0%
₩16,305,000-21,171,999	9.3%	9.6%
₩27,174,000-38,041,999	16.6%	13.7%
₩38,044,000-48,911,999	10.2%	10.9%
₩48,912,000-59,781,999	10.4%	9.3%
₩59,782,000-70,652,999	11.9%	10.8%
₩70,653,000-81,520,999	7.1%	7.5%
₩81,521,000-92,390,999	3.5%	5.3%
₩92,391,000-103,259,999	4.3%	4.5%
₩103,260,000+	10.9%	15.4%

# SECTION – O'AHU

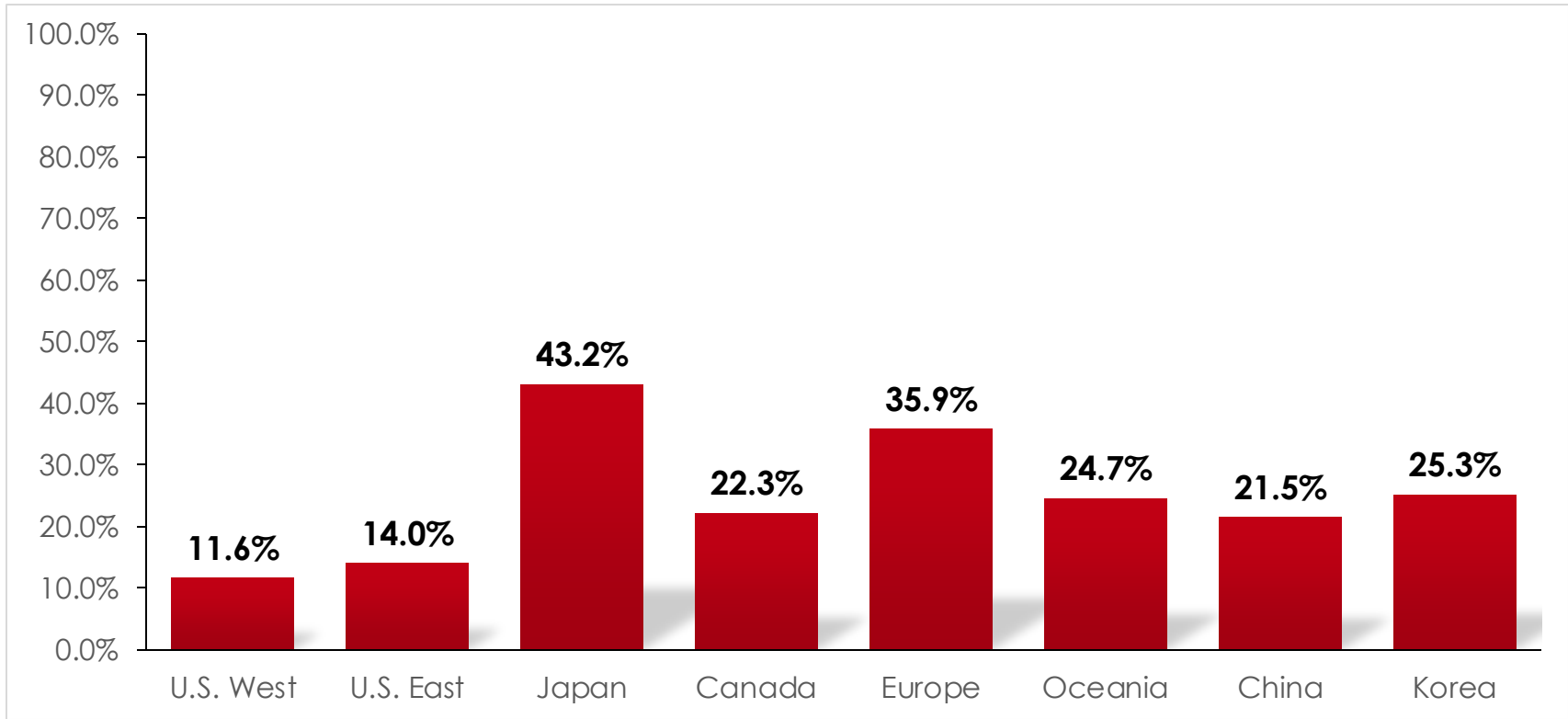
# ADVERTISING AWARENESS – O‘AHU



# ADVERTISING AWARENESS – O‘AHU

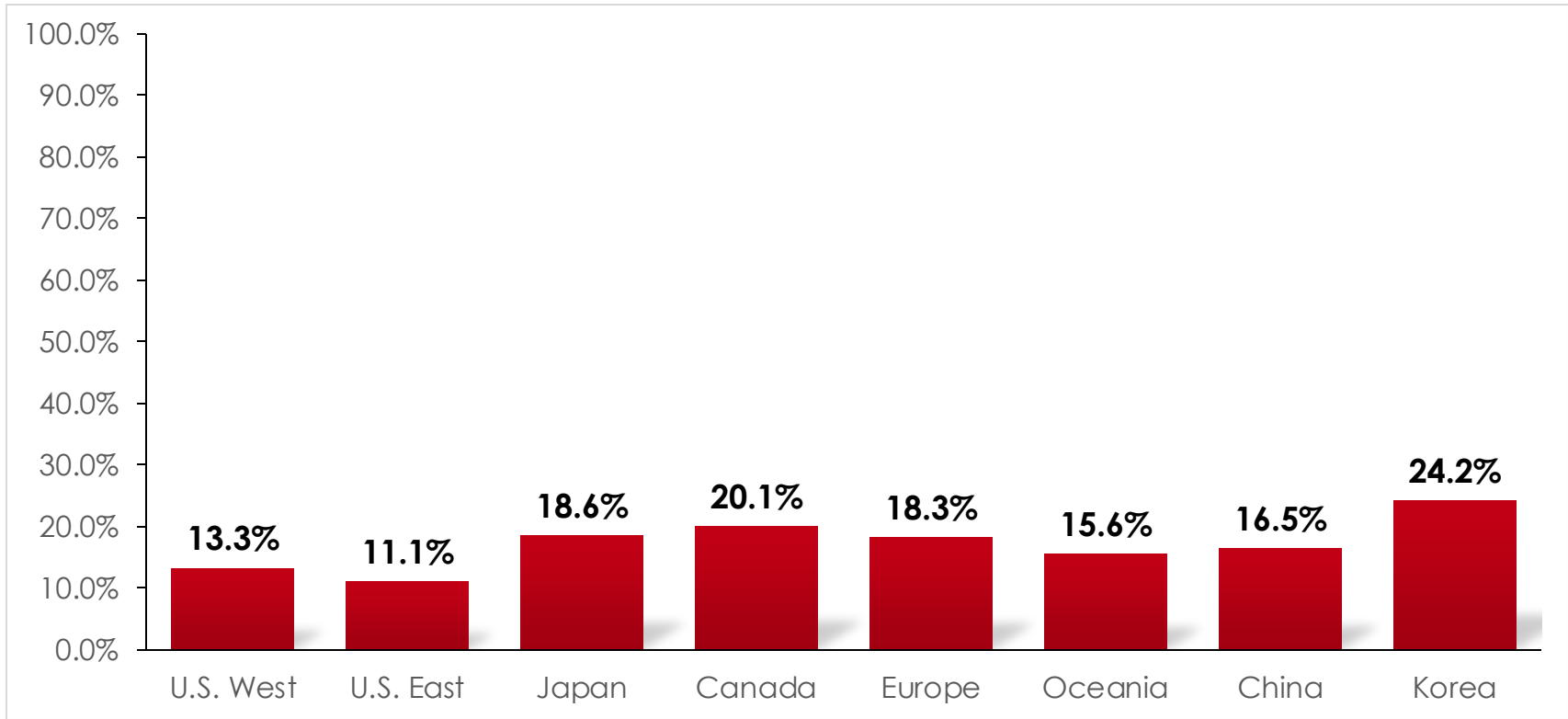
- Visitors from Japan were most likely to be exposed to advertising for O‘ahu followed by visitors from China, Oceania, and Korea.
- Repeat visitors from U.S. West, U.S. East, Japan, Oceania, and China were more likely to be exposed to marketing for O‘ahu than first-time visitors from these markets.
- Female visitors from Korea were more likely to be exposed to marketing for O‘ahu than male visitors from this visitor market.
- Visitors without a college degree from U.S. East, Oceania, and China were more likely to be exposed to marketing for O‘ahu than those without a college degree.
- Younger segments, particularly visitors under the age of 35 were least likely to have been exposed to marketing for O‘ahu prior to their trip in the following MMAs: U.S. West, U.S. East and Japan.

# IMPACT OF LOCATION FILMING – O‘AHU

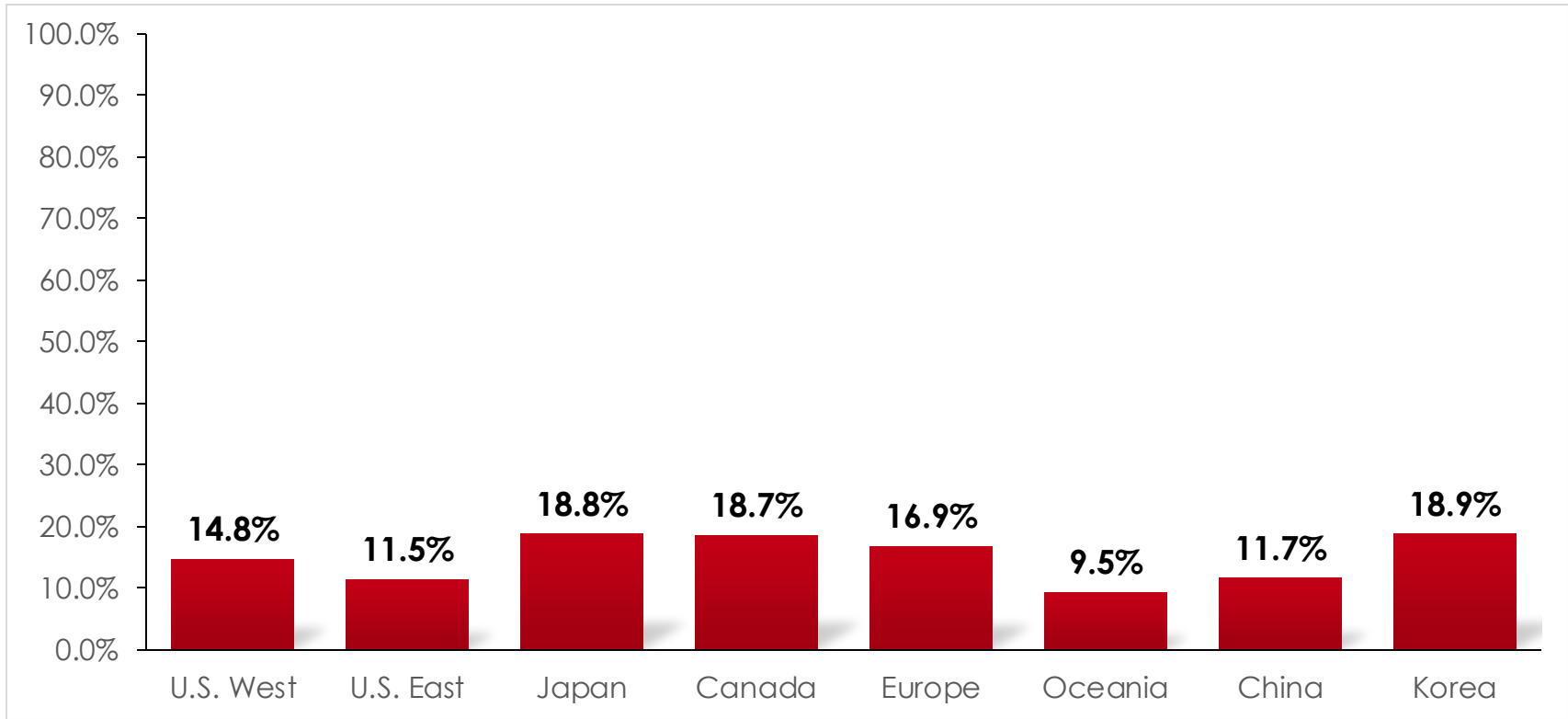




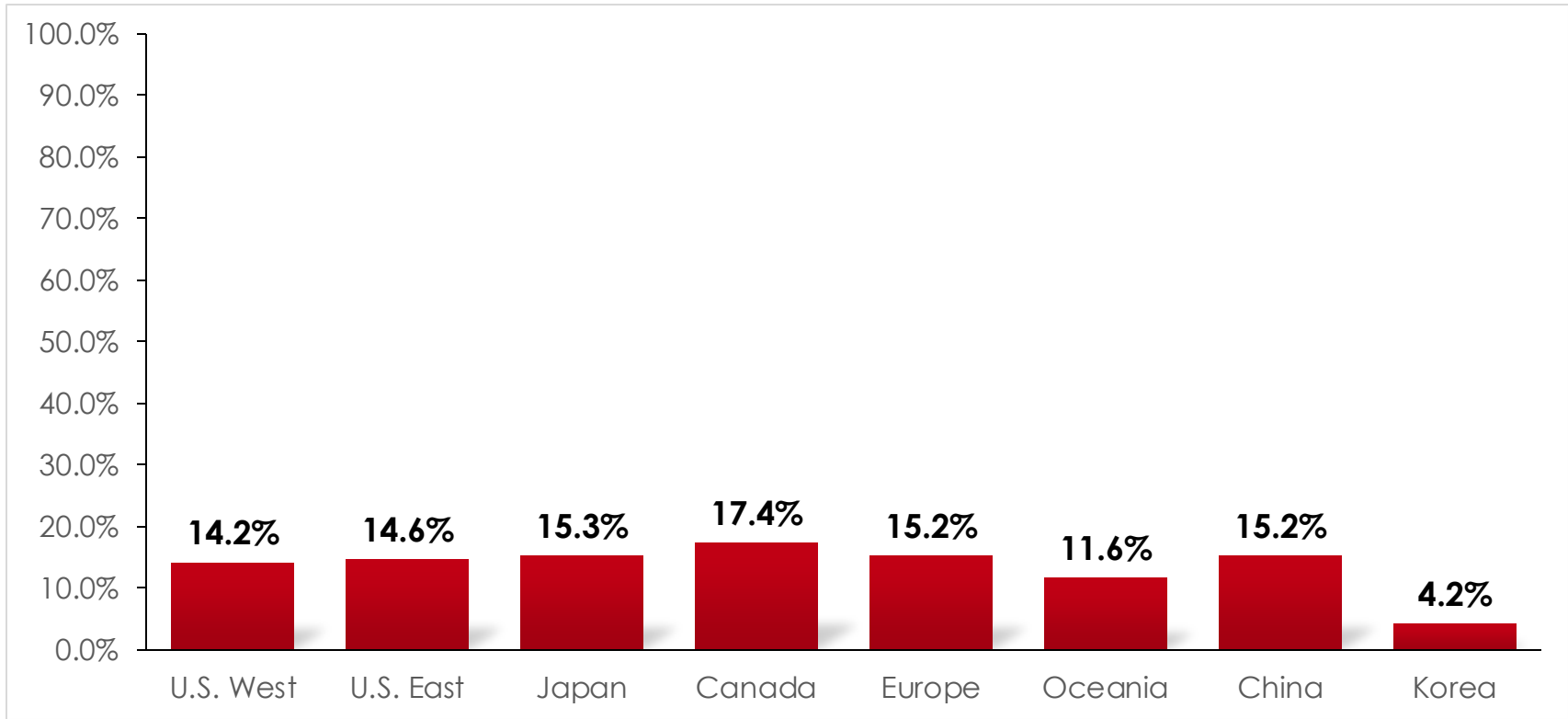
# IMPACT OF SOCIAL MEDIA POSTS – O‘AHU



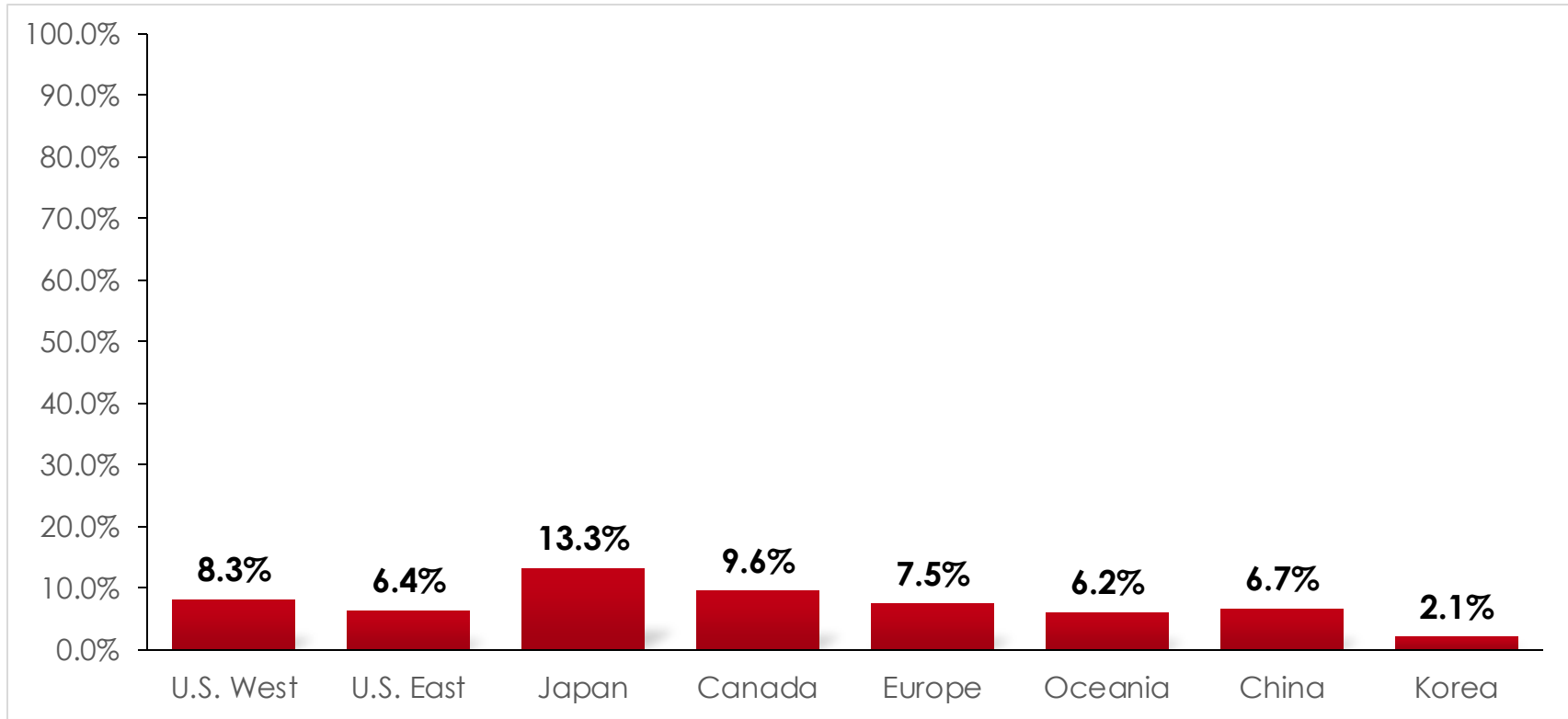
# IMPACT OF OUTDOOR/ SPORTING EVENTS – O‘AHU



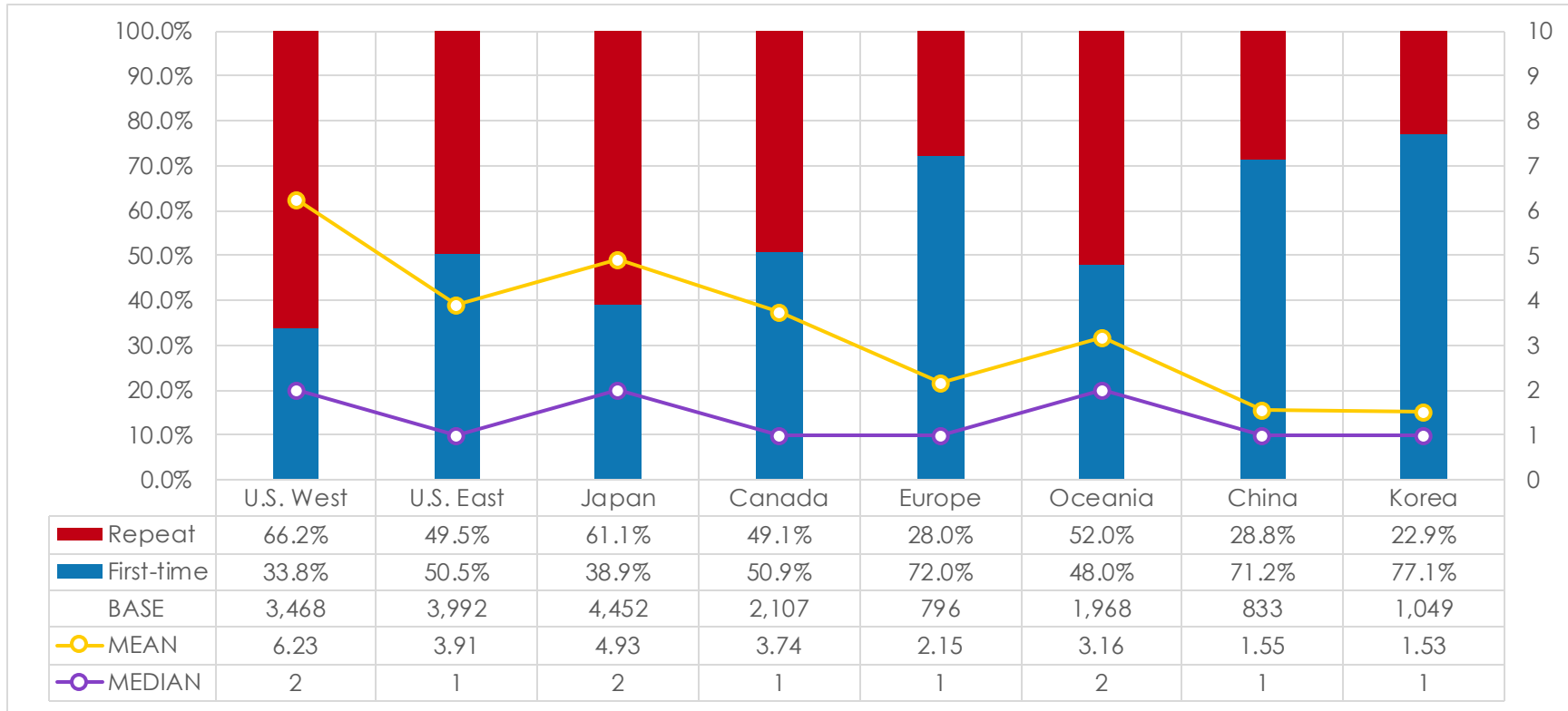
# IMPACT OF HAWAIIAN CULTURAL EVENTS – O‘AHU



# IMPACT OF HAWAIIAN MUSIC – O‘AHU



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - O'AHU



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - O'AHU

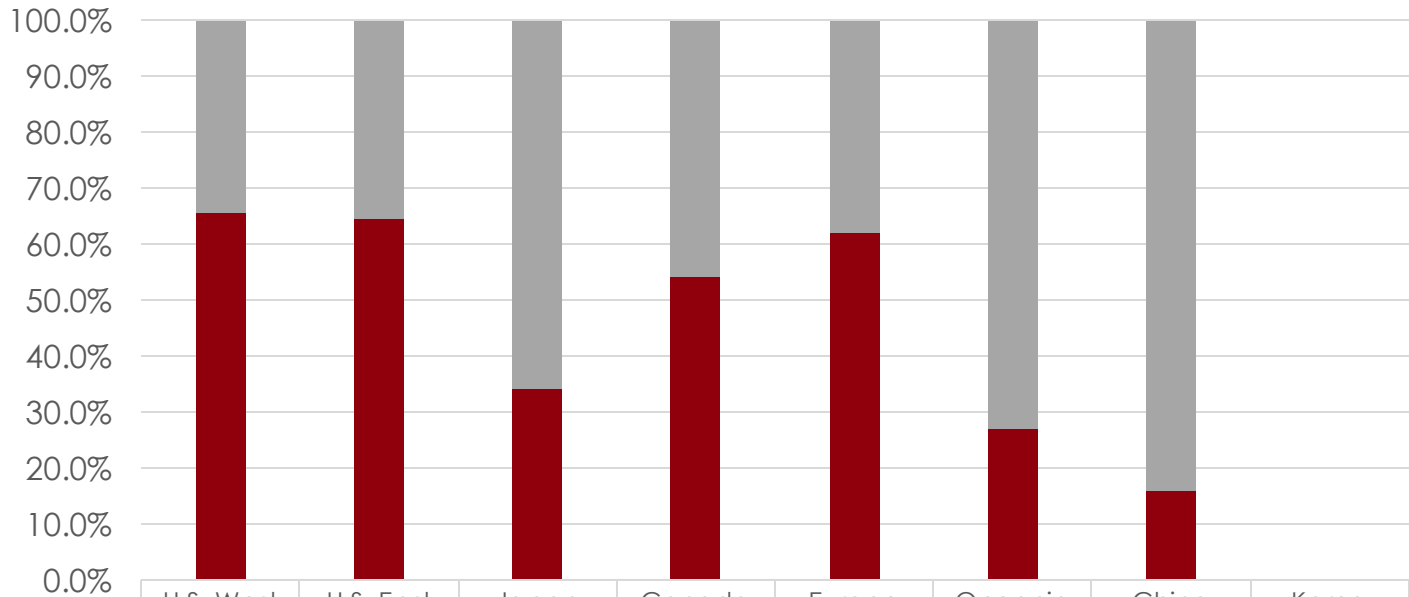
- Visitors from U.S. West have visited O'ahu more frequently compared to other visitor markets.
- College educated travelers from U.S. West were more frequent visitors to O'ahu compared to visitors from this market without a college degree.
- Male visitors from U.S. West, U.S. East, and Canada traveled more frequently to O'ahu than their female counterparts. The opposite was true among Japanese visitors where females visited O'ahu more frequently than males.
- Among travelers from U.S. West, those who visited just O'ahu during their most recent trip were more frequent travelers to Hawai'i compared to those who visited multiple islands during their stay. The opposite was true among Japanese travelers.
- When segmented by travel party size, we find visitors traveling alone from U.S. West, U.S. East, Japan, and China were the most frequent visitors to O'ahu compared to those traveling with others.

# ACCOMMODATIONS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hotel	58.8%	60.3%	82.8%	51.4%	67.4%	82.2%	74.1%	90.3%
Vacation rental (includes AirBnB, VRBO, etc.)	17.9%	12.9%	1.2%	26.8%	15.8%	9.0%	9.5%	3.8%
Friends or Relatives	16.9%	17.0%	1.5%	6.5%	7.4%	1.9%	5.1%	2.0%
Timeshare Unit	9.1%	9.1%	7.3%	9.4%	1.9%	2.1%	2.1%	1.3%
Condominium	5.4%	4.5%	8.7%	10.8%	4.7%	6.1%	5.8%	1.3%
Day trip/ Did not stay overnight	2.0%	2.5%	2.1%	1.4%	1.0%	1.9%	2.9%	0.6%
Rental House	2.2%	2.3%	0.3%	2.7%	3.1%	0.7%	1.1%	2.3%
Cruise Ship	1.1%	2.4%	0.9%	2.0%	1.5%	1.9%	0.5%	0.1%

# ACCOMMODATIONS - O'AHU

Vacation rental/ Rental house/ Private room/ Shared room



■ Visitor area	34.2%	35.5%	65.8%	45.8%	38.1%	73.0%	83.8%	0.0%
■ Residential Neighborhood	65.8%	64.5%	34.2%	54.2%	61.9%	27.0%	16.2%	0.0%
BASE	700	600	3	622	153	176	7	0



# ACCOMMODATIONS - O'AHU

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	42.5%	44.0%	0.0%	42.6%	45.1%	45.7%	56.8%	0.0%
Price	23.9%	21.2%	32.9%	27.3%	28.3%	28.4%	43.2%	0.0%
Ability to have travel party stay together	16.6%	14.3%	34.2%	11.0%	11.0%	8.7%	0.0%	0.0%
Amenities like home	13.3%	14.2%	32.9%	17.7%	13.6%	16.1%	0.0%	0.0%
Owned by self, friend, relative	2.0%	2.0%	0.0%	0.4%	1.3%	0.5%	0.0%	0.0%

## STRENGTHS/ POSITIVE ASPECTS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Variety of activities/ attractions/ many choices	17.7%	22.3%	19.9%	22.0%	19.5%	18.9%	16.9%	26.2%
Beach/ ocean	18.3%	13.3%	26.2%	19.0%	17.1%	15.7%	20.2%	21.9%
Nature/ natural beauty/ scenery	11.6%	15.9%	16.6%	17.0%	17.6%	9.6%	31.4%	23.2%
Feeling of the "Aloha Spirit"	9.8%	9.1%	3.4%	9.8%	13.5%	10.9%	6.8%	3.9%
Overall customer service/ hospitality/ the people	6.7%	6.5%	4.3%	6.9%	8.0%	13.6%	1.8%	9.0%
Food/ restaurant variety/ dining options	8.0%	5.0%	6.9%	3.9%	3.0%	4.4%	4.7%	5.5%
Events/ celebrations with friends/ family	7.0%	5.6%	4.2%	3.0%	3.0%	2.0%	2.5%	0.7%
Local culture/ people/ music	5.8%	5.3%	2.7%	4.8%	5.1%	5.2%	2.9%	2.5%
Military historical sites	3.2%	7.4%	0.5%	2.1%	4.8%	3.4%	1.7%	0.0%

## STRENGTHS/ POSITIVE ASPECTS - O'AHU

- Visitors from Japan, China, and Korea tend to focus more on facets like beaches and O'ahu's natural beauty while those from the U.S., Canada, Oceania, and Europe were more likely to single out visitor experience aspects like hospitality and the Aloha spirit.
- Among Japanese visitors, younger segments of the sample were more likely to mention the variety of activities and the beach when asked to identify positive aspects of their trip.
- Younger visitors from U.S. West and U.S. East were also more likely to mention the beach and ocean when asked for facets of their trip that made their stay on O'ahu more enjoyable.
- Younger visitors from U.S. West or those under the age of 35, were the most likely to list food/restaurant/dining option as a positive aspect that made their trip more enjoyable.
- Male visitors from U.S. West were also more likely to mention food/restaurant/dining variety as a reason their trip was more enjoyable, more so than females from this market.
- Female visitors from Japan were more likely to mention Hawai'i's beaches as a positive aspect of their trip than were males from this market.

# AREAS OF OPPORTUNITIES - O'AHU

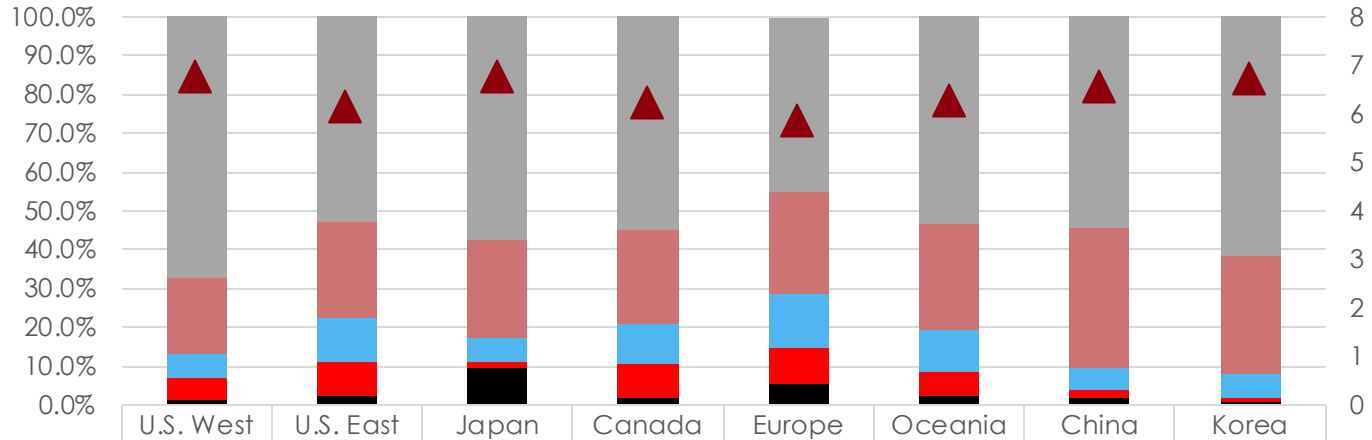
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>No negatives</b>	33.7%	34.4%	39.2%	35.4%	40.1%	41.2%	47.5%	28.4%
<b>Traffic</b>	20.6%	23.6%	6.0%	14.4%	9.8%	5.9%	4.7%	5.4%
<b>Driving experience</b>	8.8%	7.6%	4.4%	5.2%	5.4%	1.9%	3.3%	3.1%
<b>More local culture</b>	5.7%	5.7%	6.3%	8.0%	9.9%	7.3%	10.7%	9.1%
<b>Concerns about safety</b>	4.4%	4.1%	7.4%	4.3%	3.4%	2.9%	3.6%	7.7%
<b>Food/ restaurant variety/ dining options</b>	2.5%	2.3%	2.4%	3.2%	3.5%	6.0%	6.2%	8.1%
<b>Cost/ Expensive</b>	2.3%	2.7%	3.1%	4.4%	6.4%	5.0%	0.6%	2.8%
<b>Ground transportation</b>	1.5%	1.5%	6.0%	2.6%	2.9%	2.1%	3.8%	2.3%
<b>Rental car experience</b>	2.7%	2.5%	2.3%	2.7%	1.4%	1.7%	1.8%	4.4%
<b>Food/ restaurant quality</b>	1.2%	1.2%	5.1%	2.2%	1.5%	2.0%	2.9%	7.1%

# AREAS OF OPPORTUNITIES - O'AHU

- The traffic situation on Oahu is especially an issue for male visitors from U.S. West and U.S. East.
- Younger visitors from U.S. East, Canada, Europe, and Oceania under the age of 35 would like to experience more local culture, while this could be improved for seniors in Korea over the age of 55.
- Visitors from Japan were most concerned about safety on O'ahu, while the driving experience was more of an improvement for visitors from U.S. West and U.S. East.
- Cost was more of a concern to visitors from Europe and Oceania, specifically families with children and those between the age of 35 to 54.
- Repeat visitors to O'ahu from Canada, Europe, Oceania, China, and Korea were less likely to have opportunities for improvements, compared to visitors from U.S. West and U.S. East.

# LIKELIHOOD OF RETURN VISIT – O‘AHU

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	67.4%	52.9%	57.7%	54.7%	44.9%	53.6%	54.4%	61.8%
■ Somewhat likely (5-6)	19.4%	24.5%	25.0%	24.3%	26.4%	27.2%	36.0%	30.2%
■ Somewhat unlikely (3-4)	6.3%	11.5%	6.2%	10.3%	13.7%	10.5%	6.0%	6.1%
■ Very unlikely (1-2)	5.7%	8.7%	1.7%	8.7%	9.7%	6.6%	1.9%	1.2%
■ Not sure	1.2%	2.4%	9.5%	2.0%	5.2%	2.1%	1.7%	0.7%
BASE	3,418	3,939	4,441	2,079	783	1,942	831	1,048
▲ MEAN	6.75	6.14	6.77	6.21	5.86	6.25	6.56	6.73

# LIKELIHOOD OF RETURN VISIT – O‘AHU

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Visitors from U.S. West & Japan express the highest likelihood of return to O'ahu.
- When segmented by age, we find younger visitors from Japan or those under 35 are the least likely to return to O'ahu compared to older visitors from Japan. Conversely, among visitors from U.S. West, seniors were the least likely to indicate a return to O'ahu among this visitor market. Among visitors from Oceania, those under the age of 50 express a greater likelihood of return.
- Among visitors from U.S. West, U.S. East, Japan, and Canada, those without a college degree showed higher probabilities of a return visit than those with a college degree.
- Male visitors from U.S. West and Canada were more likely to return to O'ahu than females from these markets. For visitors from Oceania, females were more likely to return.
- Visitors from U.S. West, U.S. East, Canada, and Oceania who visited just O'ahu during their most recent trip were more likely to return to the island than those who also visited a Neighbor Island. Among Japanese visitors, those who also visited multiple islands were likely to return than those who just visited O'ahu.

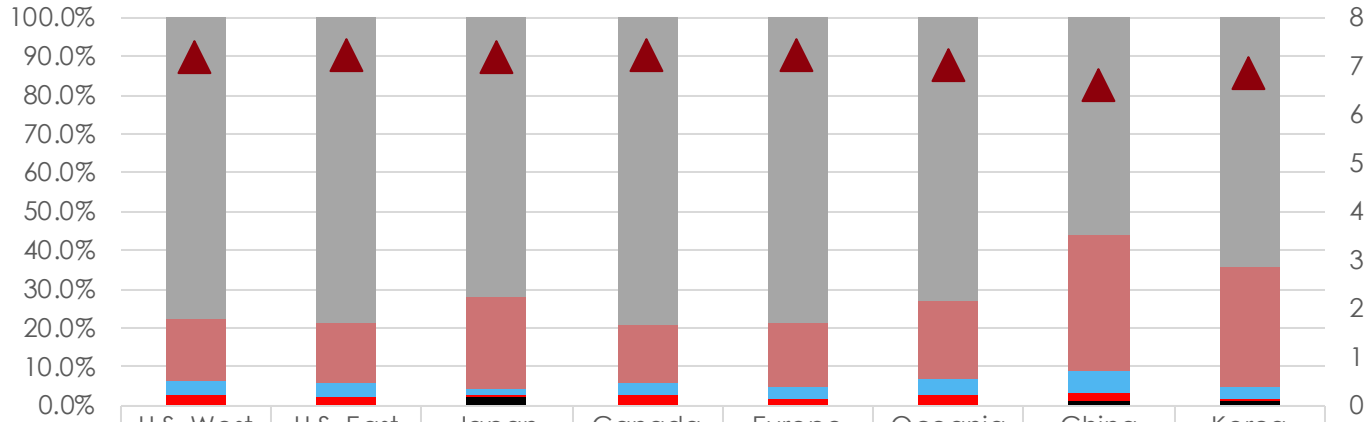
# REASONS FOR NOT RETURNING - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	38.1%	41.5%	24.5%	47.6%	32.1%	45.7%	39.5%	14.0%
Too expensive/cost	28.2%	37.9%	33.3%	37.4%	50.0%	33.0%	42.4%	57.2%
Too commercial/overdeveloped	35.1%	25.2%	4.4%	27.4%	17.6%	24.3%	9.5%	7.1%
Too crowded/congested/ traffic	38.7%	27.3%	2.5%	22.7%	11.9%	14.3%	1.2%	8.3%
Flight too long	3.6%	23.4%	23.5%	19.4%	47.3%	13.4%	32.4%	36.3%
Other financial obligations	7.0%	10.5%	32.0%	9.0%	10.1%	5.8%	0.0%	10.3%
No reason to return/nothing new	13.8%	11.9%	7.7%	9.9%	8.0%	17.5%	26.2%	14.7%
Not enough value for the price	12.6%	12.2%	4.7%	14.0%	14.3%	21.8%	27.1%	29.2%
Unfriendly people/ felt unwelcome	5.1%	2.9%	3.1%	2.6%	3.6%	2.6%	7.6%	5.1%
Poor health/ age restriction	2.7%	3.5%	4.8%	2.4%	3.3%	4.1%	4.8%	0.0%
Poor service	2.9%	1.1%	2.0%	0.7%	1.8%	3.5%	0.0%	5.7%



# O'AHU - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	77.5%	78.6%	72.0%	79.3%	78.9%	73.2%	56.3%	64.3%
■ Somewhat likely (5-6)	16.3%	15.4%	23.5%	14.9%	16.4%	20.0%	34.7%	31.0%
■ Somewhat unlikely (3-4)	3.5%	3.6%	1.6%	3.2%	2.8%	4.0%	6.0%	2.9%
■ Very unlikely (1-2)	2.3%	2.1%	0.5%	2.2%	1.8%	2.4%	1.6%	0.7%
■ Not sure	0.4%	0.3%	2.3%	0.4%	0.1%	0.4%	1.4%	1.1%
BASE	3,402	3,920	4,437	2,064	774	1,923	827	1,047
▲ MEAN	7.17	7.20	7.15	7.21	7.21	7.00	6.60	6.84

# O'AHU - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Brand advocacy for O'ahu was lower among visitors from China and Korea compared to other MMAs.
- Among U.S. visitors, brand advocacy was higher among younger travelers, particularly those under 35.
- Visitors from Japan and U.S. West without a college degree were more likely to recommend O'ahu than those with a college degree from these markets.
- Female visitors from U.S. East and Oceania were more likely to recommend O'ahu to others than males from these markets.
- Those who visited just Oahu on their most recent trip were more likely to recommend the island than those whose trip included visits to multiple islands from the following: U.S. West, U.S. West, Canada, and Oceania.

# O'AHU ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.4%	94.6%	94.7%	93.9%	94.9%	90.6%	95.4%	97.5%
<b>On own (self-guided)</b>	75.2%	74.5%	63.8%	75.1%	60.3%	43.8%	54.6%	76.4%
<b>Helicopter/ airplane</b>	1.4%	3.3%	1.6%	2.4%	5.7%	3.9%	7.4%	3.1%
<b>Boat/ submarine/ whale</b>	13.9%	17.8%	11.7%	15.3%	15.8%	13.3%	28.9%	16.8%
<b>Visit towns</b>	40.2%	42.5%	32.6%	43.9%	38.8%	24.7%	29.9%	36.2%
<b>Limo/ van/ bus tour</b>	11.0%	18.5%	18.6%	15.0%	25.7%	33.2%	12.2%	17.2%
<b>Scenic views/ natural landmark</b>	50.7%	59.4%	16.2%	61.0%	55.1%	47.6%	54.2%	53.6%
<b>Movie/ TV/ film location</b>	7.4%	9.7%	5.0%	11.7%	13.1%	11.0%	14.8%	17.4%

# O'AHU ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.9%	93.1%	95.2%	97.3%	96.2%	92.8%	93.8%	98.8%
<b>Beach/ sunbathing</b>	81.3%	80.7%	74.0%	89.2%	86.2%	77.2%	72.9%	77.8%
<b>Bodyboard/ Standup paddle board</b>	12.0%	10.4%	3.1%	13.2%	12.5%	7.8%	2.3%	7.0%
<b>Surfing</b>	6.8%	6.6%	3.2%	11.4%	12.8%	7.9%	6.4%	12.1%
<b>Canoeing/ kayak</b>	5.3%	5.7%	2.1%	4.6%	5.5%	2.8%	2.1%	5.8%
<b>Swim- ocean</b>	61.8%	61.1%	34.7%	74.2%	69.1%	64.4%	35.1%	47.1%
<b>Snorkel</b>	33.9%	31.8%	16.1%	43.4%	34.7%	23.9%	20.4%	46.9%
<b>Windsurf/ Kitesurf</b>	0.4%	0.2%	0.2%	0.2%	0.5%	0.0%	0.8%	0.7%
<b>Jet ski/ Parasail</b>	2.3%	2.3%	3.4%	1.4%	0.7%	1.3%	1.5%	5.9%
<b>Scuba</b>	2.3%	2.3%	2.0%	2.4%	2.7%	0.5%	5.0%	3.8%
<b>Fishing</b>	2.0%	2.4%	0.6%	1.5%	1.2%	0.5%	4.0%	1.2%
<b>Golf</b>	2.9%	3.2%	3.4%	2.7%	1.5%	2.0%	4.4%	2.3%

# O'AHU ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.9%	93.1%	95.2%	97.3%	96.2%	92.8%	93.8%	98.8%
<b>Run/ Jog/ Fitness walk</b>	21.7%	21.1%	11.7%	25.1%	13.6%	19.9%	15.1%	10.1%
<b>Spa</b>	7.6%	7.6%	6.8%	5.3%	5.6%	5.8%	7.0%	7.6%
<b>Hiking</b>	40.5%	46.1%	20.1%	52.2%	43.1%	21.2%	27.9%	21.1%
<b>Backpack/Camp</b>	1.6%	1.3%	0.2%	2.0%	1.2%	0.3%	4.4%	1.4%
<b>Agritourism</b>	11.5%	13.7%	9.6%	12.9%	11.8%	8.8%	19.3%	21.2%
<b>Sport event/ tournament</b>	3.7%	3.0%	1.8%	3.7%	2.6%	2.5%	1.5%	1.2%
<b>Park/ botanical garden</b>	30.3%	36.6%	20.1%	38.3%	34.2%	28.3%	32.0%	24.5%
<b>Waterpark</b>	2.1%	2.0%	2.4%	3.0%	1.8%	1.2%	11.5%	2.2%
<b>Mountain tube/ waterfall rappel</b>	0.4%	0.4%	0.1%	0.8%	2.8%	0.2%	0.7%	0.4%
<b>Zip-lining</b>	3.4%	2.9%	0.9%	1.5%	1.2%	2.5%	1.0%	1.2%
<b>Skydiving</b>	1.0%	1.0%	1.0%	0.8%	0.8%	0.2%	5.9%	2.9%
<b>All terrain vehicle (ATV)</b>	2.8%	3.3%	1.3%	2.6%	1.4%	4.3%	8.2%	12.6%
<b>Horseback riding</b>	1.8%	2.0%	3.5%	1.7%	1.6%	0.9%	8.7%	1.3%

# O‘AHU ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	97.9%	97.9%	97.5%	98.5%	98.6%	98.6%	95.8%	98.5%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	17.9%	20.2%	16.4%	18.8%	26.0%	17.3%	55.5%	36.0%
<b>Live music/ stage show</b>	29.8%	32.9%	16.7%	31.9%	29.0%	23.2%	13.9%	14.6%
<b>Nightclub/ dancing/ bar/ karaoke</b>	11.4%	10.8%	5.7%	10.5%	11.4%	8.4%	11.9%	4.8%
<b>Fine dining</b>	45.7%	49.4%	45.6%	41.4%	37.8%	35.3%	52.4%	52.3%
<b>Family restaurant</b>	60.0%	56.1%	22.5%	62.6%	48.6%	68.4%	25.1%	38.9%
<b>Fast food</b>	42.3%	41.8%	54.9%	57.1%	53.3%	51.7%	44.8%	60.3%
<b>Food truck</b>	36.4%	35.3%	16.8%	43.9%	34.3%	24.0%	24.1%	58.4%
<b>Café/ coffee house</b>	43.2%	38.6%	48.9%	49.9%	50.4%	58.1%	36.9%	59.4%
<b>Ethnic dining</b>	35.1%	35.6%	8.8%	28.0%	21.1%	15.6%	23.8%	27.2%
<b>Prepared own meal</b>	33.5%	30.7%	13.1%	46.2%	28.8%	21.8%	20.7%	12.6%

## O‘AHU ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	94.2%	94.3%	98.1%	96.1%	96.8%	96.9%	93.8%	99.0%
<b>Mall/ department store</b>	53.4%	49.1%	86.0%	66.5%	67.6%	80.7%	70.4%	84.0%
<b>Designer boutique</b>	15.8%	16.5%	27.4%	18.3%	16.6%	20.1%	13.4%	4.9%
<b>Hotel/ resort store</b>	35.8%	40.3%	34.8%	34.2%	31.8%	34.1%	21.9%	32.2%
<b>Swap meet/ flea market</b>	21.3%	18.0%	3.7%	17.2%	7.5%	10.0%	5.7%	3.3%
<b>Discount/ outlet store</b>	15.2%	16.9%	26.7%	22.5%	19.6%	47.4%	47.0%	67.9%
<b>Supermarket</b>	50.3%	43.6%	63.3%	58.6%	64.2%	48.3%	62.3%	60.3%
<b>Farmer's market</b>	22.0%	17.9%	15.3%	28.4%	21.4%	15.1%	12.7%	9.0%
<b>Convenience store</b>	51.1%	51.3%	51.1%	61.3%	43.5%	67.4%	45.5%	54.0%
<b>Duty free store</b>	5.8%	6.3%	45.1%	10.9%	7.6%	11.8%	62.4%	48.4%
<b>Local shop/ artisan</b>	51.9%	54.3%	9.0%	53.1%	53.2%	47.6%	30.0%	15.7%

# O‘AHU ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	70.0%	79.8%	51.1%	75.6%	81.4%	71.9%	80.3%	64.4%
<b>Historic military site</b>	35.5%	53.9%	16.4%	41.3%	57.4%	47.0%	49.4%	16.8%
<b>Other historical site</b>	21.2%	25.9%	10.7%	23.7%	25.0%	19.1%	25.4%	26.8%
<b>Museum/ art gallery</b>	14.2%	15.5%	6.4%	15.2%	16.8%	13.6%	23.2%	7.3%
<b>Luau/ Polynesian show/ hula show</b>	32.8%	39.4%	13.7%	35.0%	32.2%	27.4%	16.7%	23.2%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	8.2%	9.3%	6.7%	9.3%	7.1%	5.9%	11.0%	5.3%
<b>Play/ concert/ theatre</b>	4.7%	5.1%	4.3%	5.9%	4.4%	3.6%	4.4%	5.1%
<b>Art/ craft fair</b>	7.2%	6.9%	3.9%	8.2%	5.0%	5.8%	9.2%	4.1%
<b>Festival event</b>	5.8%	4.2%	2.4%	6.0%	4.4%	4.8%	1.4%	1.4%



# O‘AHU ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	90.1%	91.2%	96.4%	95.4%	96.0%	97.0%	82.1%	95.0%
<b>Airport shuttle</b>	19.4%	21.0%	27.3%	25.9%	25.5%	52.9%	13.0%	17.0%
<b>Trolley</b>	3.5%	4.4%	57.4%	8.8%	9.0%	24.9%	4.8%	27.6%
<b>Public bus</b>	8.7%	8.3%	18.4%	25.3%	27.1%	31.7%	17.2%	13.1%
<b>Tour bus/ tour van</b>	13.0%	19.0%	27.2%	17.1%	25.5%	35.5%	22.0%	34.7%
<b>Taxi/ limo</b>	10.5%	13.6%	33.0%	24.4%	31.1%	37.9%	22.6%	22.6%
<b>Rental car</b>	61.9%	59.3%	22.0%	60.2%	43.9%	25.6%	41.6%	53.3%
<b>Ride share</b>	27.4%	27.3%	5.9%	23.8%	25.9%	26.8%	15.5%	13.8%
<b>Bicycle rental</b>	1.7%	2.0%	3.8%	3.1%	3.0%	1.6%	2.3%	1.5%

## O'AHU ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	37.1%	32.7%	12.4%	18.4%	16.9%	8.2%	20.5%	16.9%
Visit friends/ family	36.4%	32.0%	11.7%	17.6%	14.9%	7.8%	18.3%	16.1%
Volunteer- non-profit	1.2%	0.9%	0.8%	0.8%	2.0%	0.7%	2.6%	0.8%

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Atlantis Submarine &amp; Cruises</b>	2.9%	4.9%	7.3%	3.0%	4.8%	4.4%	31.4%	6.2%
<b>Bernice P. Bishop Museum</b>	4.0%	4.3%	2.0%	4.2%	3.0%	1.7%	5.2%	1.8%
<b>Byodo-In Temple</b>	7.2%	9.6%	1.1%	12.5%	11.3%	6.1%	5.0%	0.9%
<b>Chinatown/ Hnl Arts District</b>	12.5%	13.4%	14.2%	16.6%	18.7%	9.2%	40.9%	8.8%
<b>Diamond Head State Monument</b>	27.2%	39.1%	23.6%	46.3%	46.5%	35.6%	22.0%	45.5%
<b>Dole Plantation</b>	30.7%	38.0%	13.6%	36.8%	28.0%	24.6%	36.8%	45.8%
<b>Haleiwa</b>	24.1%	24.2%	24.5%	28.8%	22.3%	12.4%	10.6%	16.9%
<b>Hanauma Bay Nature Reserve</b>	19.6%	22.6%	17.0%	34.1%	28.9%	17.4%	42.5%	39.9%
<b>Harold L. Lyon Arboretum</b>	0.9%	1.2%	1.1%	1.3%	0.9%	0.3%	2.5%	3.3%
<b>Hawaii State Art Museum or Honolulu Museum of Art</b>	2.8%	2.8%	3.4%	3.4%	3.7%	4.0%	5.6%	2.3%
<b>Hawaiian Mission Houses, historic site and archives</b>	1.3%	1.7%	0.4%	1.3%	1.9%	1.8%	2.8%	1.9%
<b>Hawaii’s Plantation Village</b>	1.8%	1.8%	1.1%	2.2%	4.5%	2.3%	7.3%	2.8%

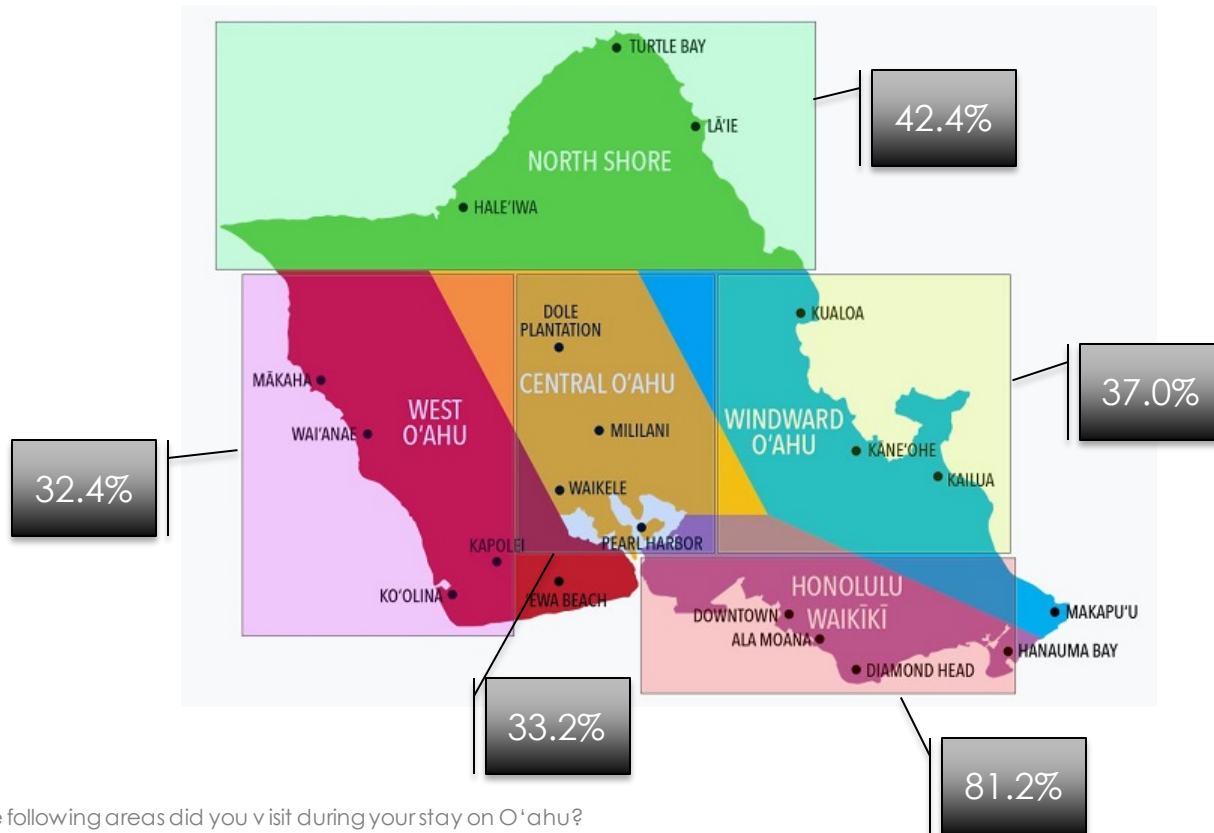
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Honolulu Zoo</b>	6.2%	6.9%	7.0%	10.5%	8.0%	9.0%	9.6%	7.6%
<b>Ho‘omaluhia Botanical Garden</b>	4.2%	4.6%	1.5%	6.3%	7.9%	2.4%	5.2%	3.7%
<b>Iolani Palace State Monument</b>	5.9%	9.8%	11.6%	8.9%	16.0%	6.9%	20.2%	18.4%
<b>Kaiwi State Scenic Shoreline/ Makapuu Trail</b>	5.3%	8.3%	4.7%	9.2%	6.7%	1.8%	14.1%	2.1%
<b>Kakaako Street Art</b>	1.7%	2.0%	14.6%	2.5%	2.5%	1.3%	8.8%	4.3%
<b>Koko Head Center Trail</b>	6.7%	8.3%	2.9%	11.8%	12.5%	5.1%	7.1%	4.7%
<b>Kualoa Private Nature Reserve</b>	9.1%	11.4%	7.6%	14.7%	15.1%	11.3%	27.8%	15.1%
<b>Lanikai or Kailua Beach</b>	29.1%	29.8%	23.1%	38.0%	37.3%	15.3%	14.8%	24.4%
<b>Manoa Falls &amp; Trail</b>	10.7%	13.2%	3.0%	17.7%	19.1%	5.0%	9.4%	4.7%
<b>National Memorial Cemetery of the Pacific</b>	9.1%	16.7%	1.4%	10.7%	16.1%	12.6%	14.9%	3.2%
<b>Nuuanu Pali Lookout</b>	7.6%	11.0%	3.4%	13.0%	9.2%	5.6%	27.5%	6.9%

## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>North Shore Beaches</b>	49.7%	53.4%	17.4%	57.2%	52.4%	38.6%	29.4%	31.7%
<b>Pearl Harbor</b>	31.3%	51.2%	9.1%	39.7%	60.5%	44.1%	51.9%	15.8%
<b>Polynesian Cultural Center</b>	18.6%	20.2%	3.5%	21.4%	15.3%	10.8%	25.9%	15.7%
<b>Queen’s Emma Summer Palace</b>	2.4%	2.5%	1.0%	2.4%	3.9%	2.3%	4.0%	1.9%
<b>Sea Life Park Hawaii</b>	4.6%	5.3%	3.1%	6.3%	3.7%	2.8%	5.6%	1.8%
<b>Waikiki Aquarium</b>	5.8%	6.0%	5.5%	8.1%	6.5%	4.5%	9.0%	3.0%
<b>Waimanalo Beach Park</b>	9.9%	12.4%	3.7%	18.7%	20.1%	7.1%	9.9%	10.4%
<b>Waimea Valley</b>	16.7%	19.6%	2.7%	21.7%	21.7%	12.0%	10.0%	4.0%

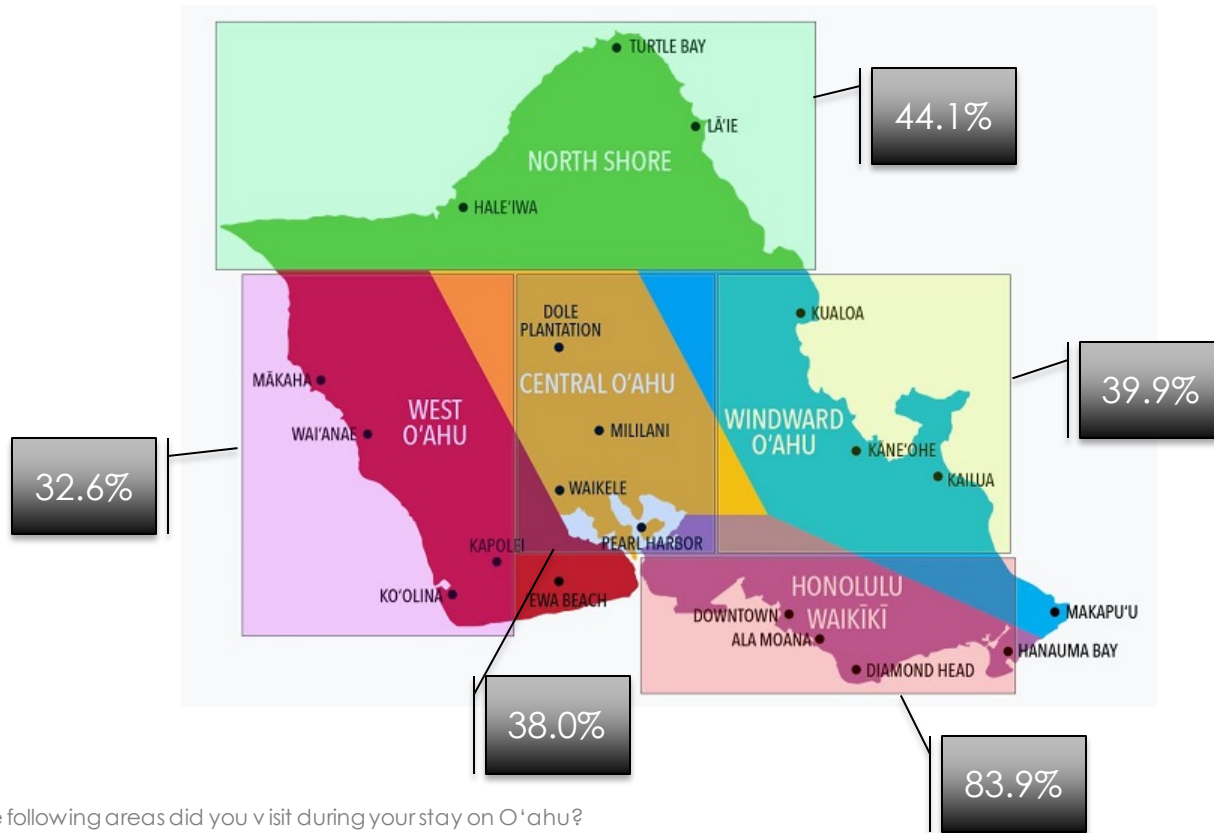
# AREAS VISITED U.S. WEST



422 Q Which of the following areas did you visit during your stay on O'ahu?

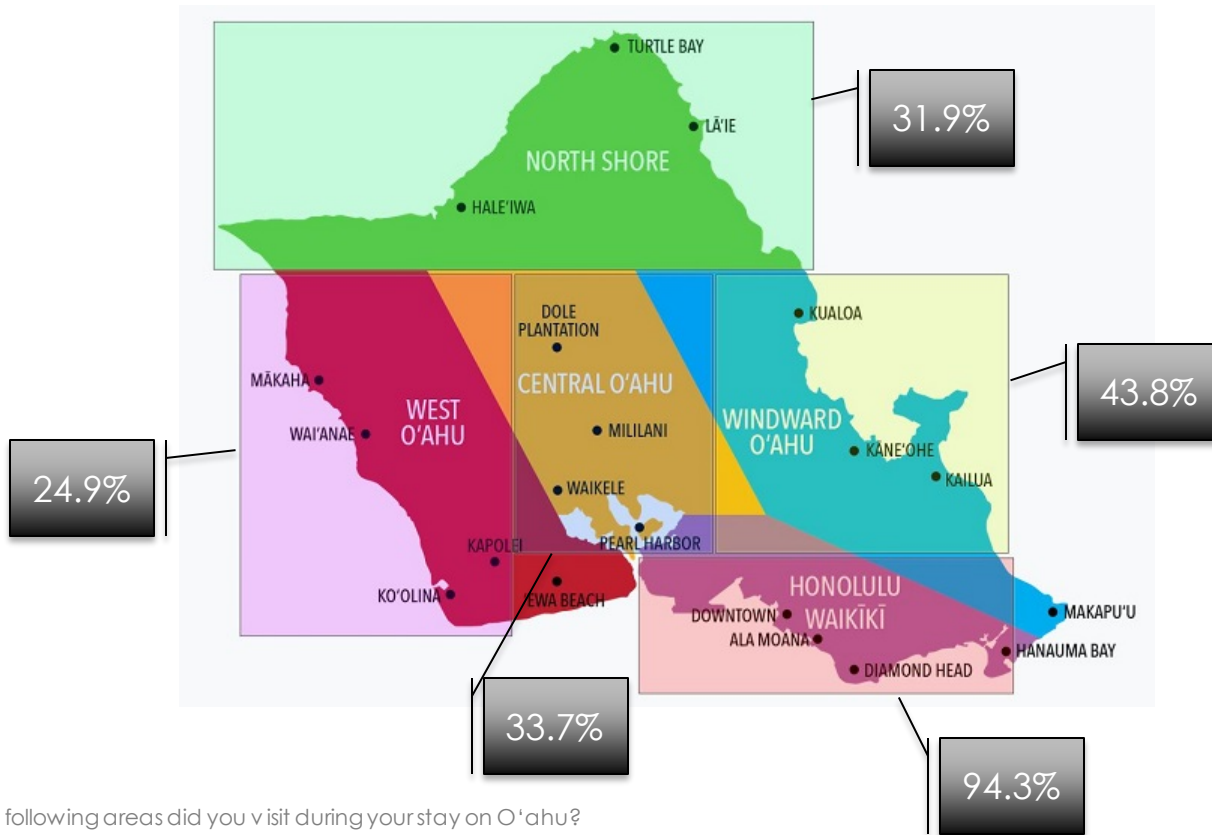
[A]

# AREAS VISITED U.S. EAST



423 Q Which of the following areas did you visit during your stay on O'ahu?

# AREAS VISITED JAPAN

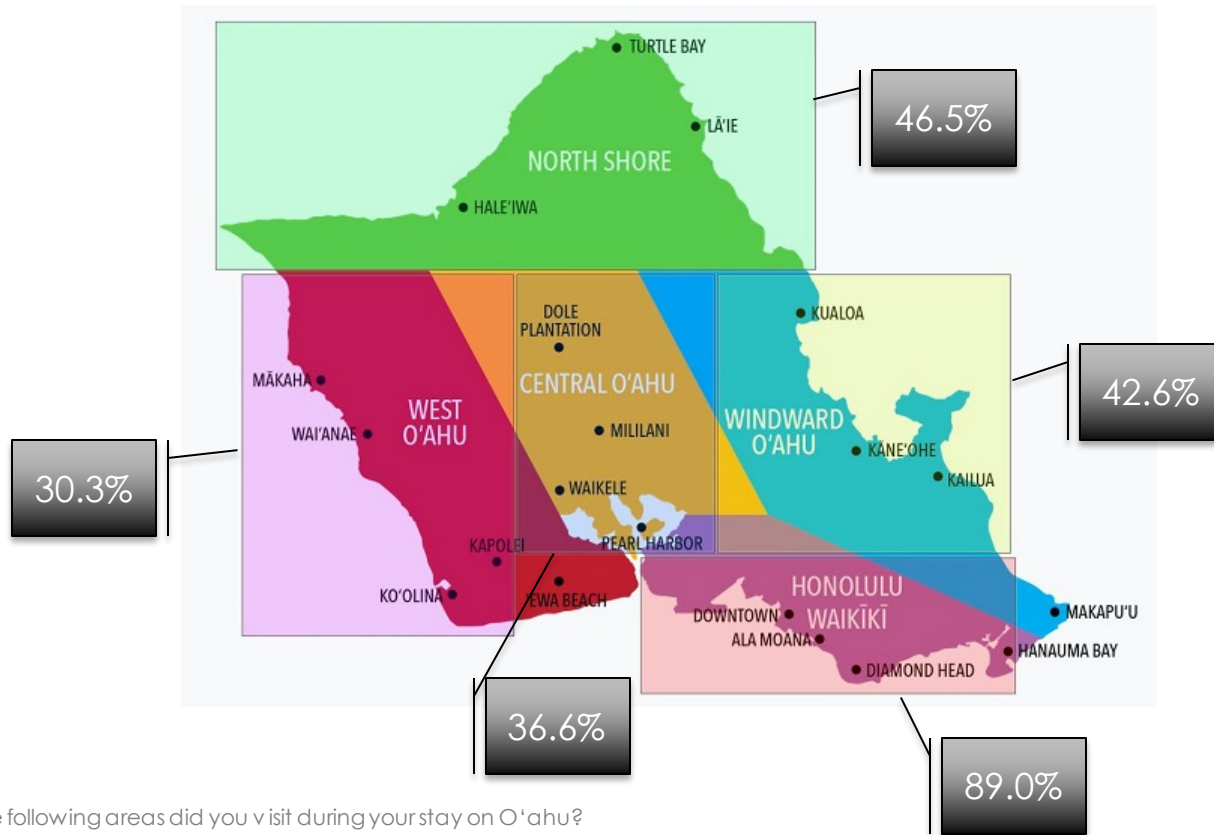


424 Q Which of the following areas did you visit during your stay on O'ahu?

[A]



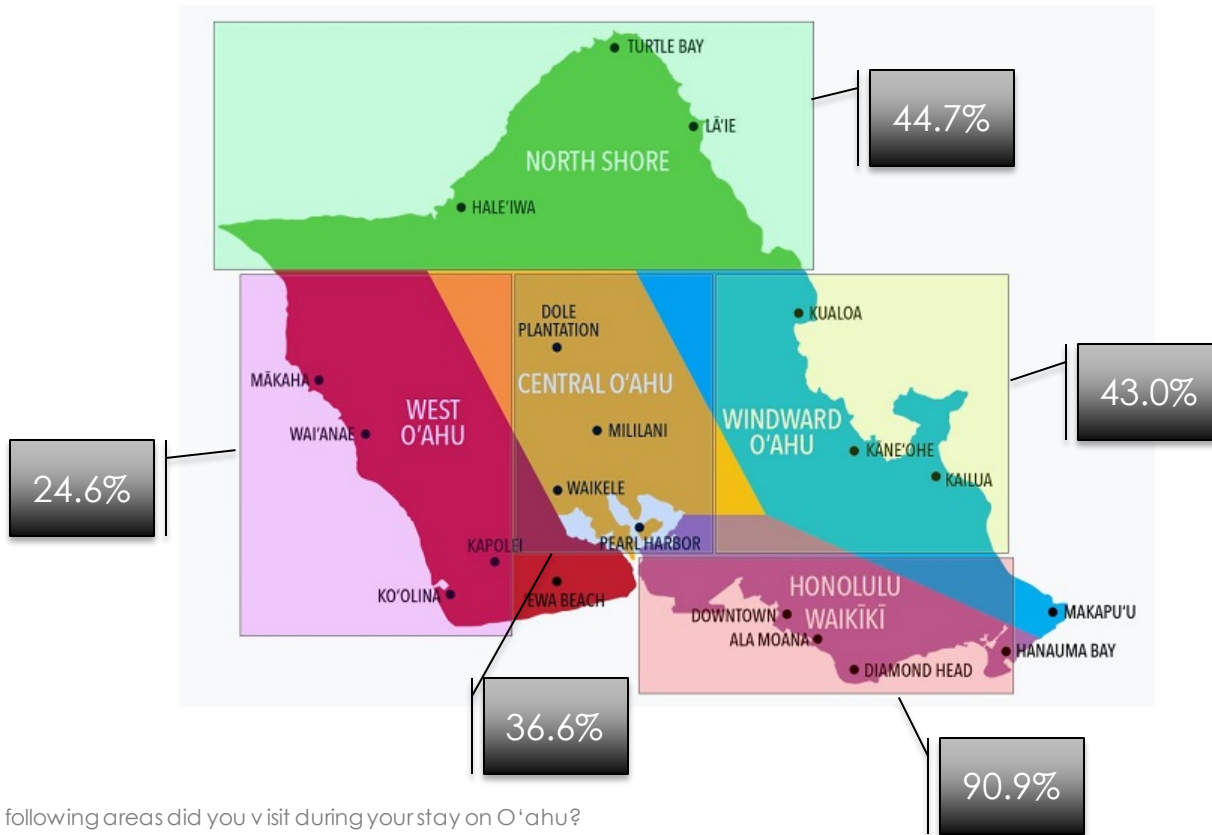
# AREAS VISITED CANADA



425 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

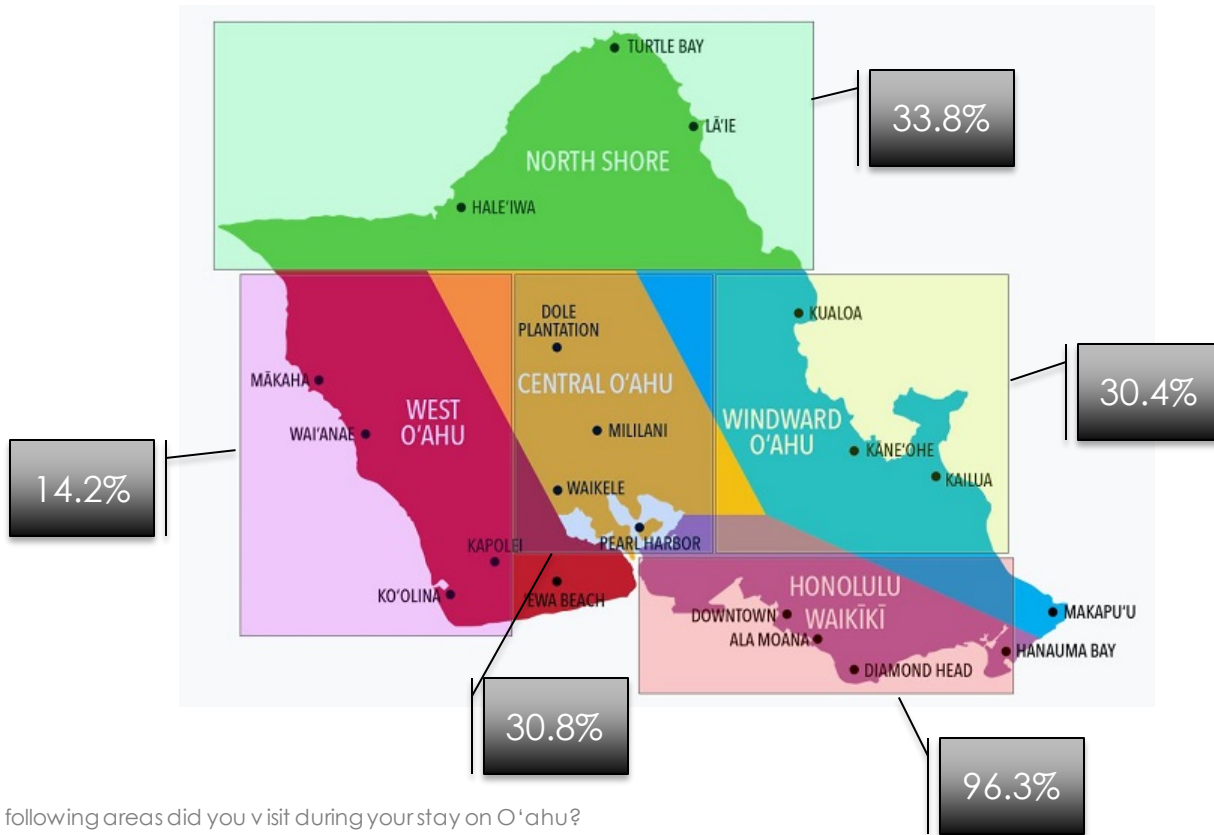
# AREAS VISITED EUROPE



426 Q Which of the following areas did you visit during your stay on O'ahu?

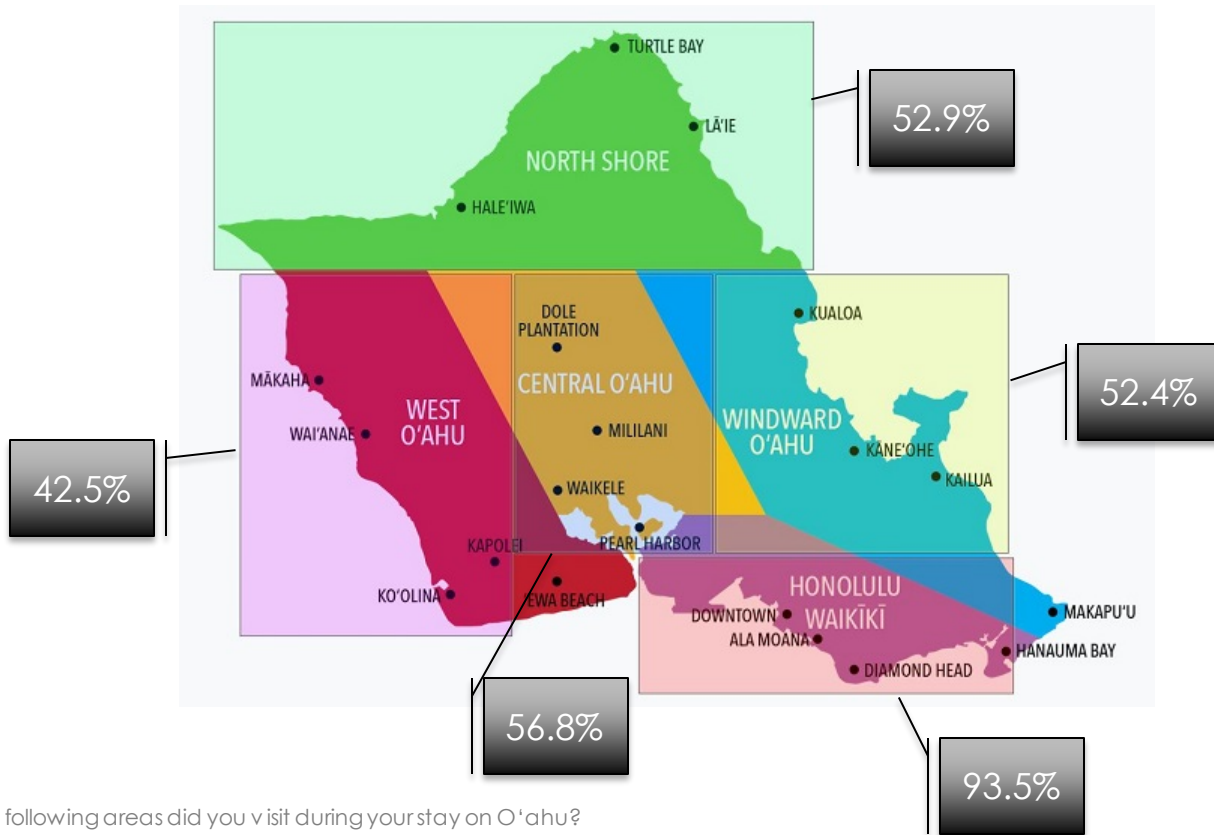
[A]

# AREAS VISITED OCEANIA



427 Q Which of the following areas did you visit during your stay on O'ahu?

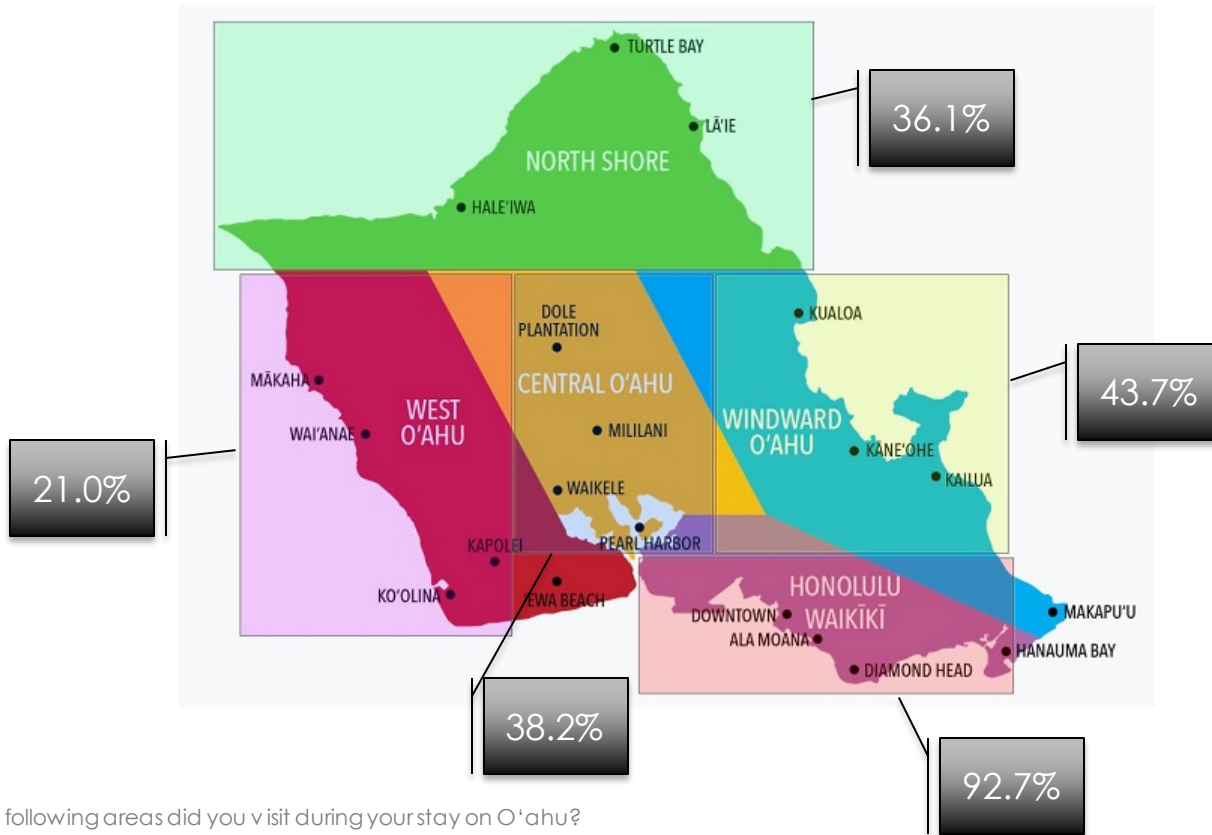
# AREAS VISITED CHINA



428 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

# AREAS VISITED KOREA

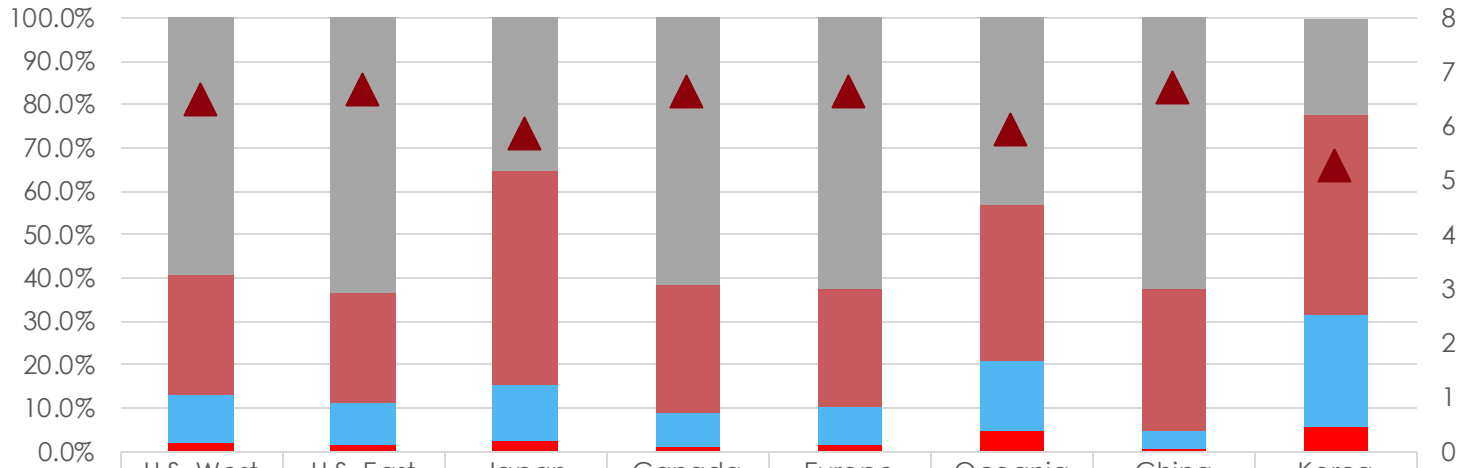


429 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

# SATISFACTION – Daniel K. Inouye International Airport

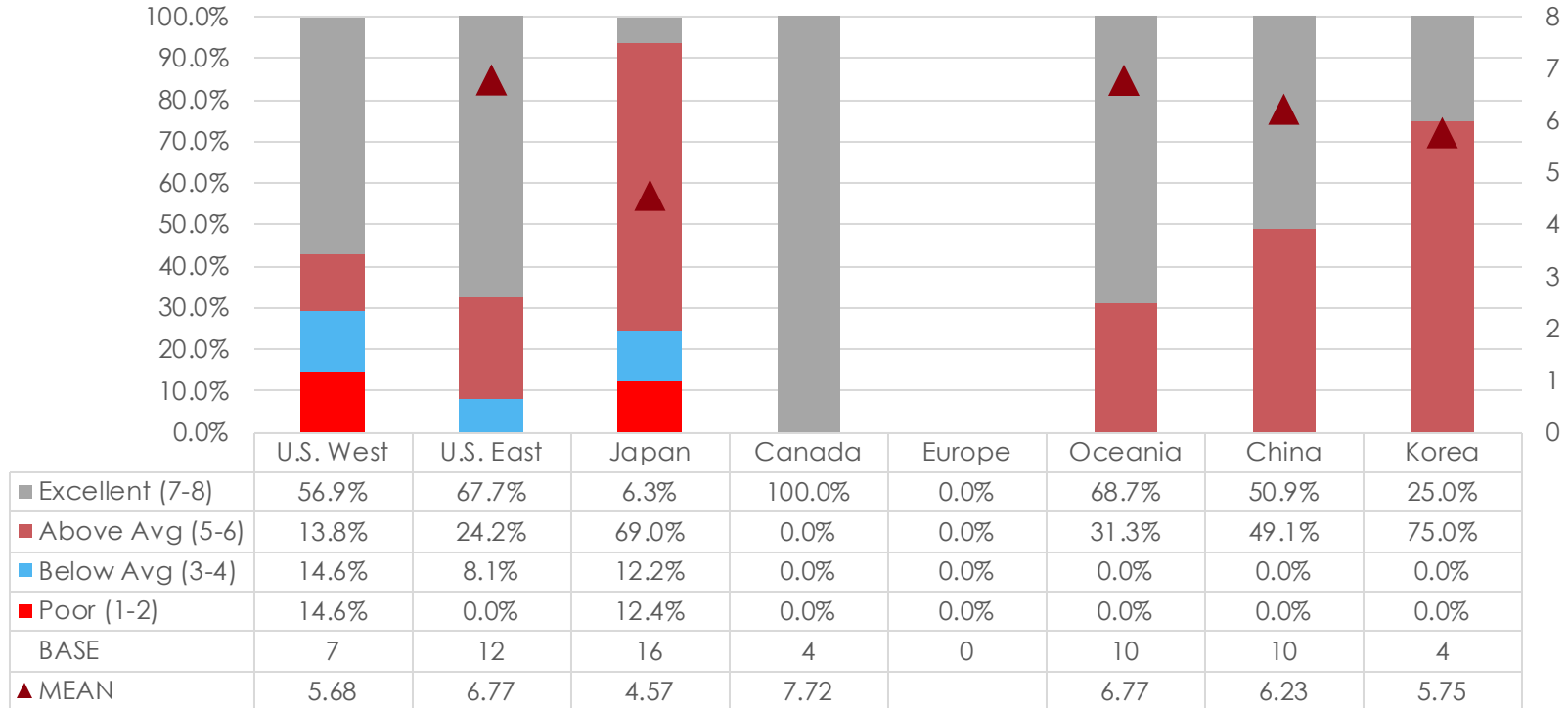
8-pt Rating Scale  
8=Excellent / 1=Poor



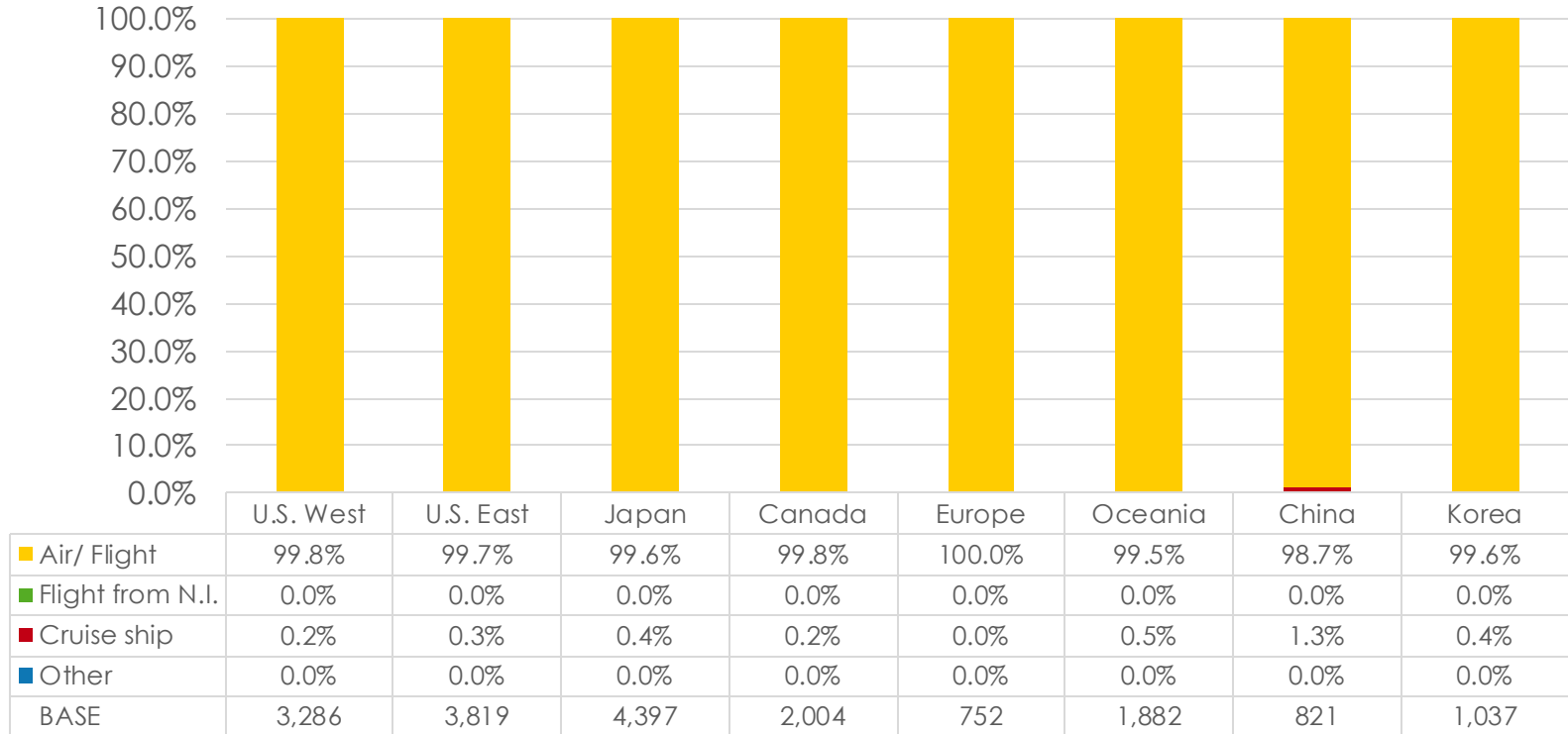
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	59.3%	63.5%	35.1%	61.7%	62.7%	43.0%	62.5%	22.5%
■ Above Avg (5-6)	27.8%	25.3%	49.3%	29.4%	27.0%	35.9%	32.6%	45.9%
■ Below Avg (3-4)	10.9%	9.6%	13.0%	7.9%	8.6%	16.5%	4.2%	25.8%
■ Poor (1-2)	2.1%	1.6%	2.6%	1.0%	1.7%	4.6%	0.8%	5.7%
BASE	3,271	3,795	4,379	1,999	750	1,871	811	1,033
▲ MEAN	6.50	6.68	5.84	6.65	6.64	5.92	6.70	5.25

# SATISFACTION – Honolulu Harbor

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



# TRANSPAC TRAVEL OPTIONS – O‘AHU

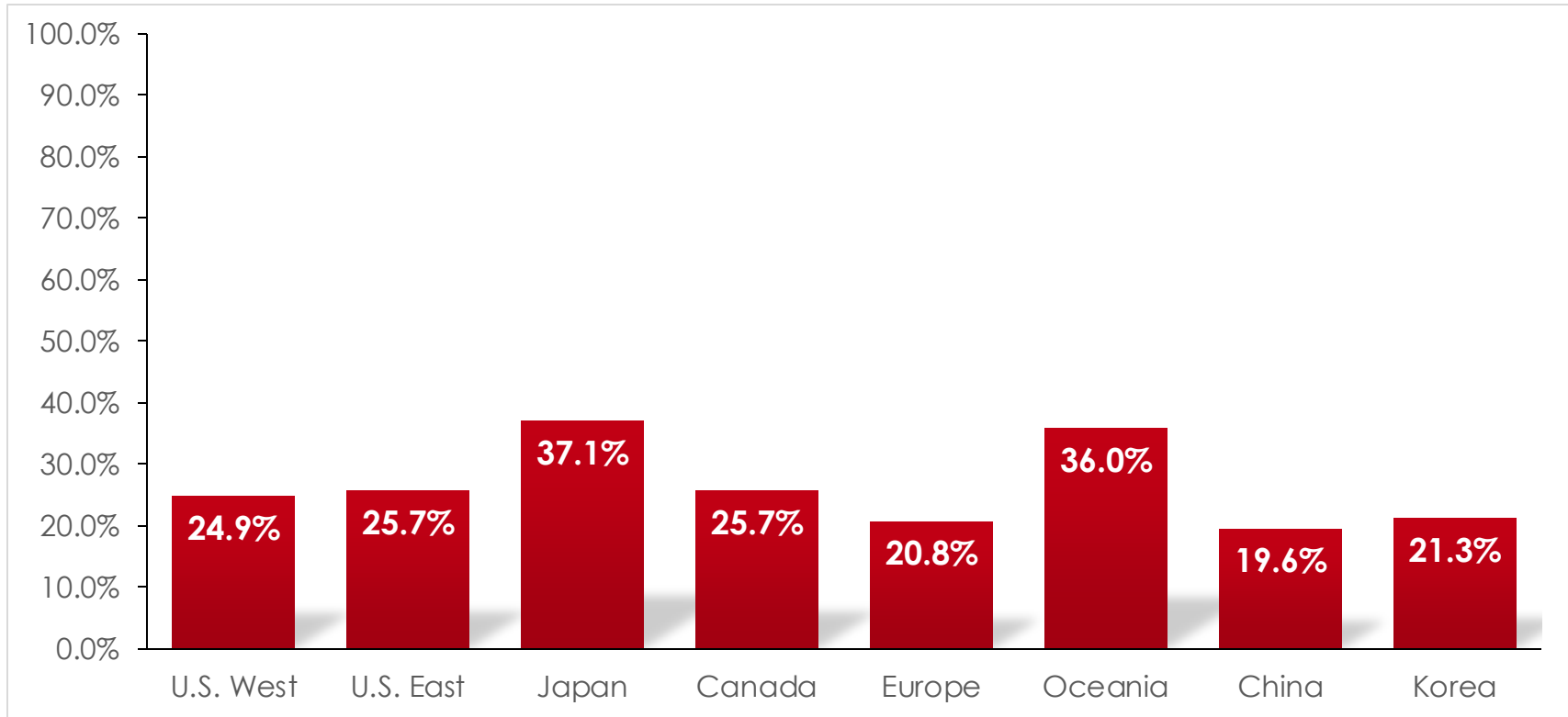




# SECTION – KAUA‘I

# ADVERTISING AWARENESS – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents

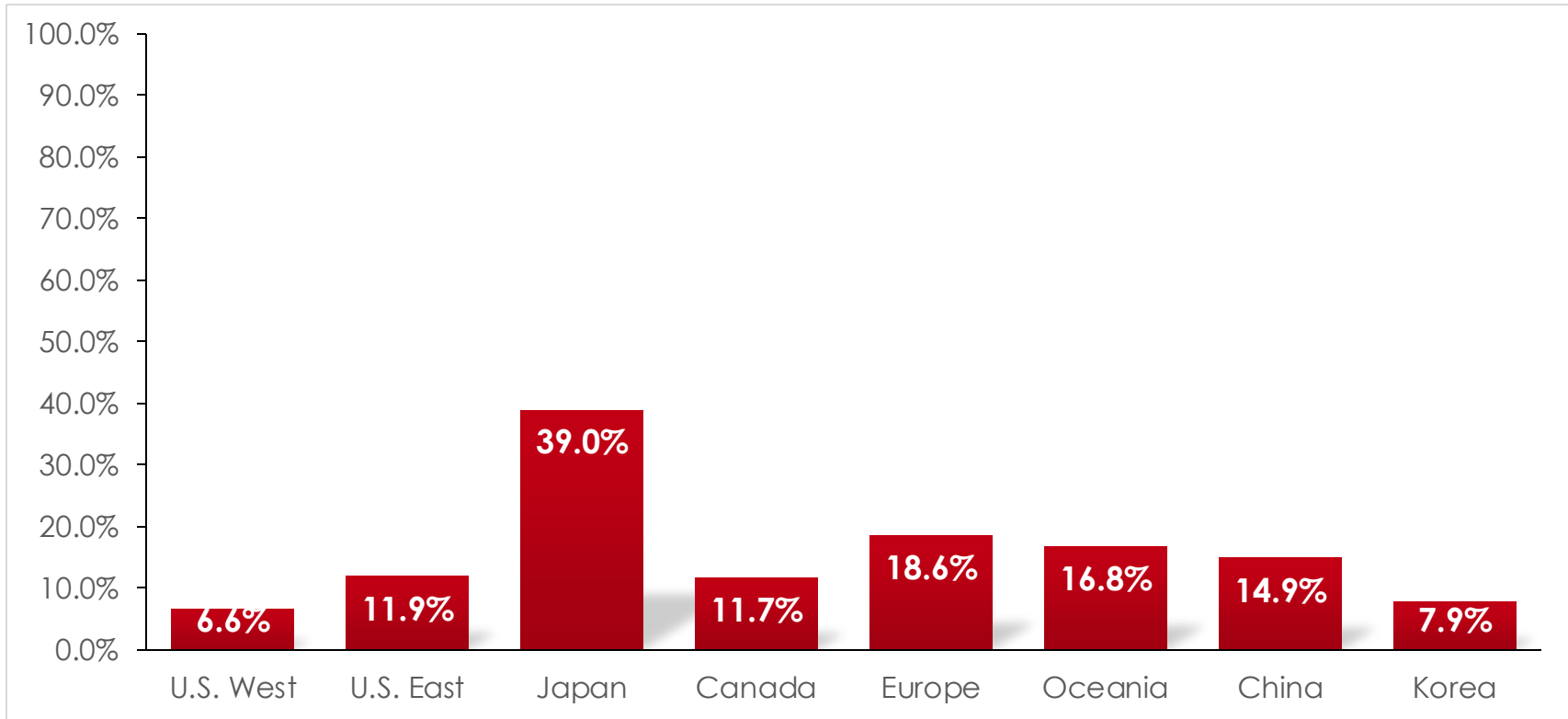


# ADVERTISING AWARENESS – KAUA‘I

- Among U.S. visitors, aided advertising awareness for Kaua‘i increased with age with younger segments of the sample were least likely to have been exposed to marketing for the island.
- Male visitors from U.S. West were more likely to have been exposed to marketing than their female counterparts.
- Visitors from U.S. West who stayed on Kaua‘i during their entire trip were less likely to have been exposed to marketing compared to those who also visited another island during their stay.
- Repeat visitors to Hawai‘i from U.S. West and U.S. East were more likely to recall marketing for Kaua‘i than first time visitors from these markets.
- Visitors from U.S. West who consulted with a travel agent were more likely to recall marketing for Kaua‘i than those visitors who did not use a travel agent.
- Visitors without a college degree from the U.S. were more likely to be exposed to marketing than more educated visitors.
- First-time visitors to Kaua‘i were less likely to be exposed to advertising for the island compared to repeat visitors in the following MMAs: U.S. West, U.S. East, and Canada.

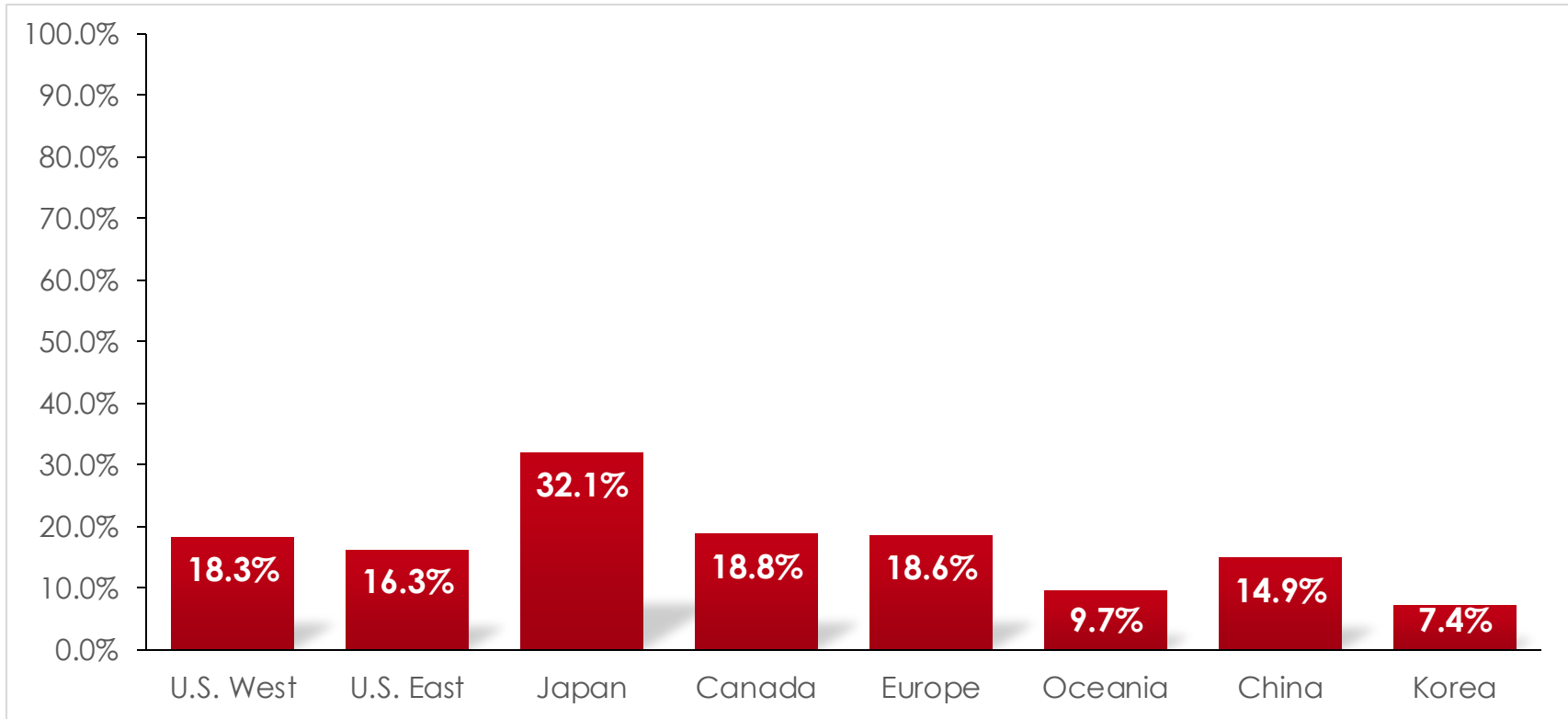
# IMPACT OF LOCATION FILMING—KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents



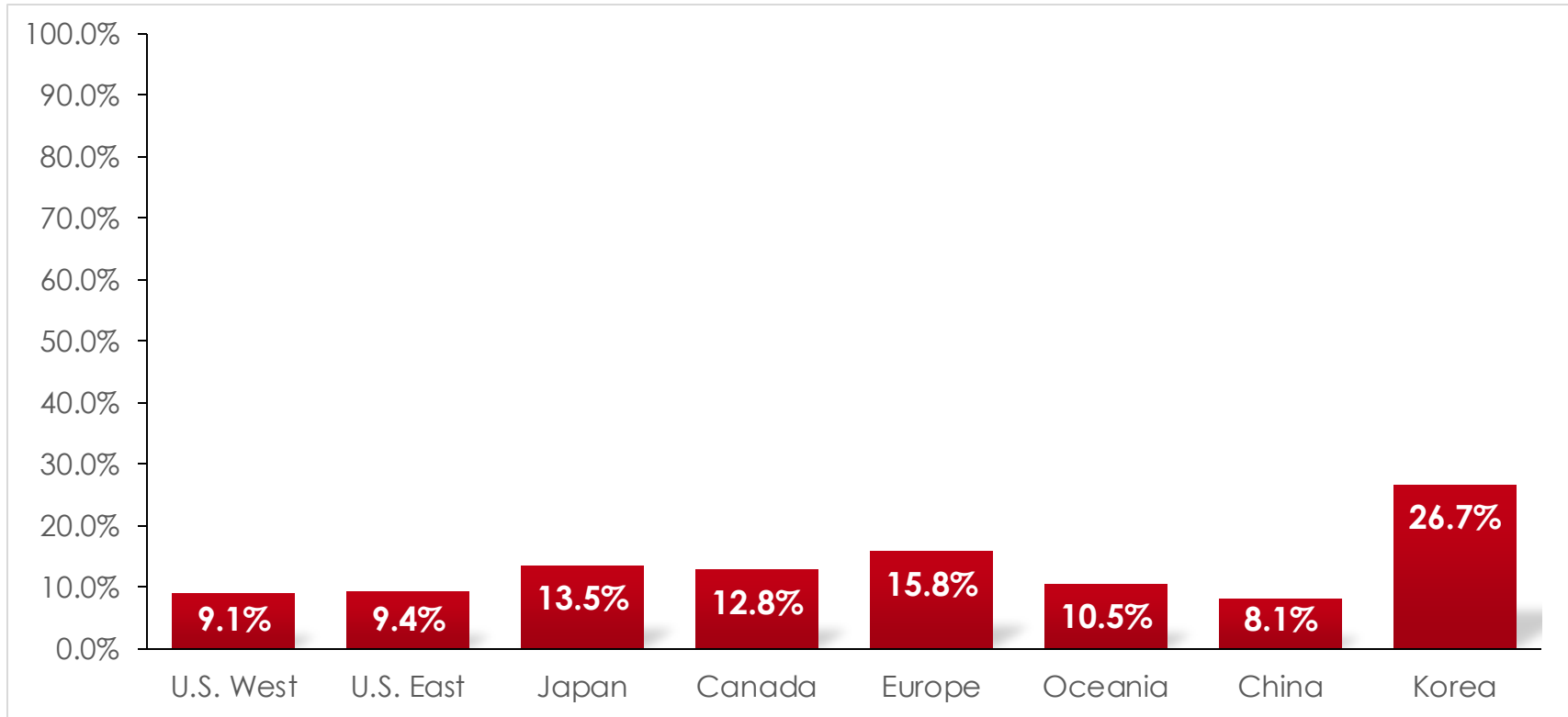
# IMPACT OF OUTDOOR/ SPORTING EVENTS – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents



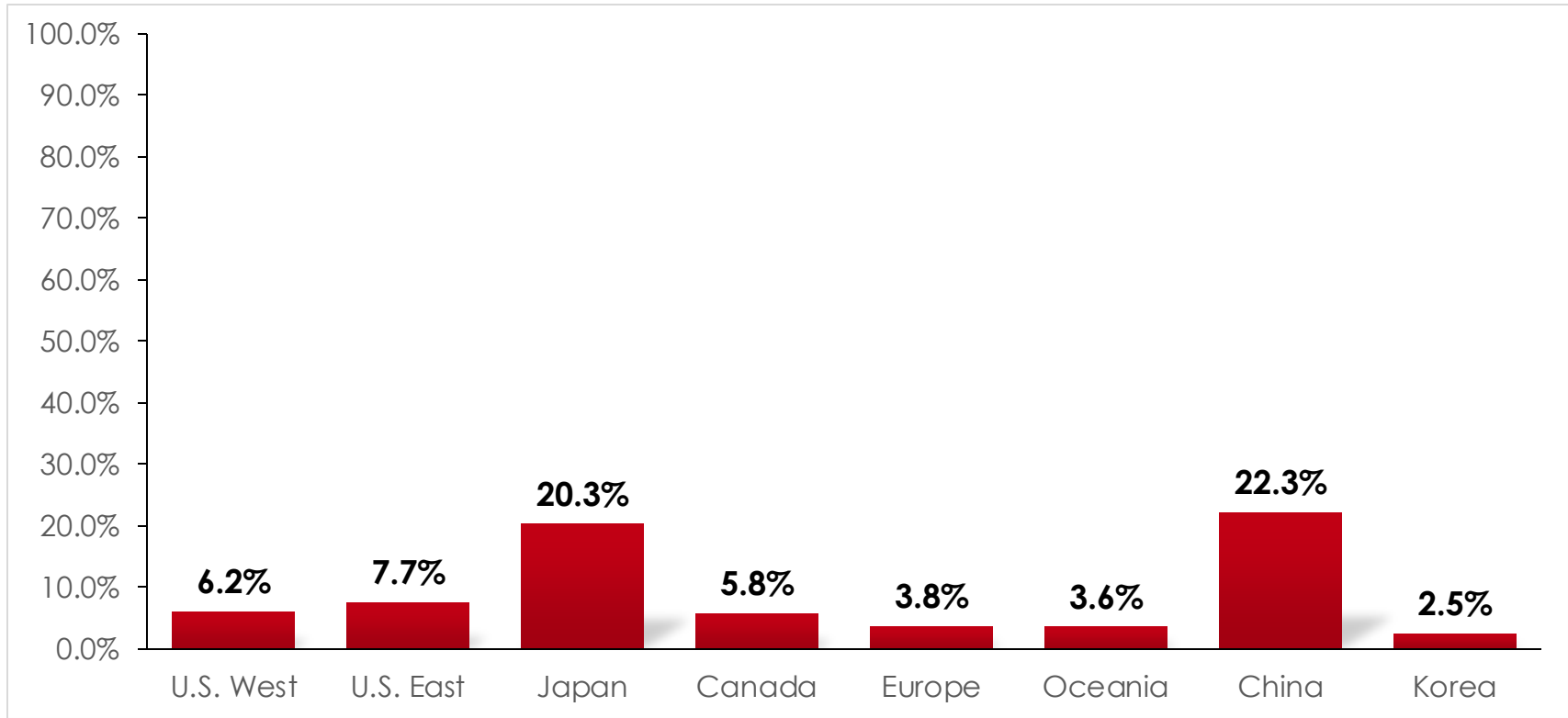
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents



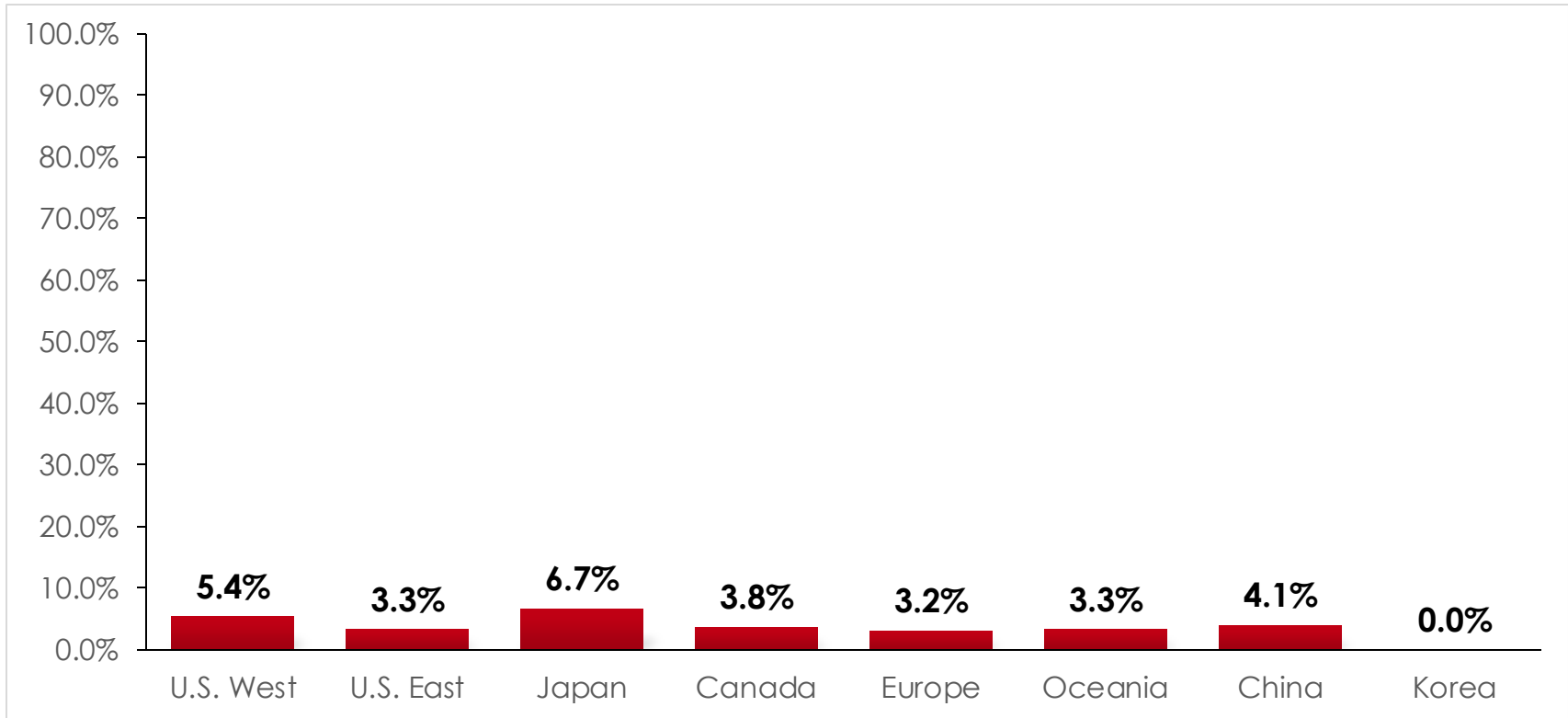
# IMPACT OF HAWAIIAN CULTURAL EVENTS – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents



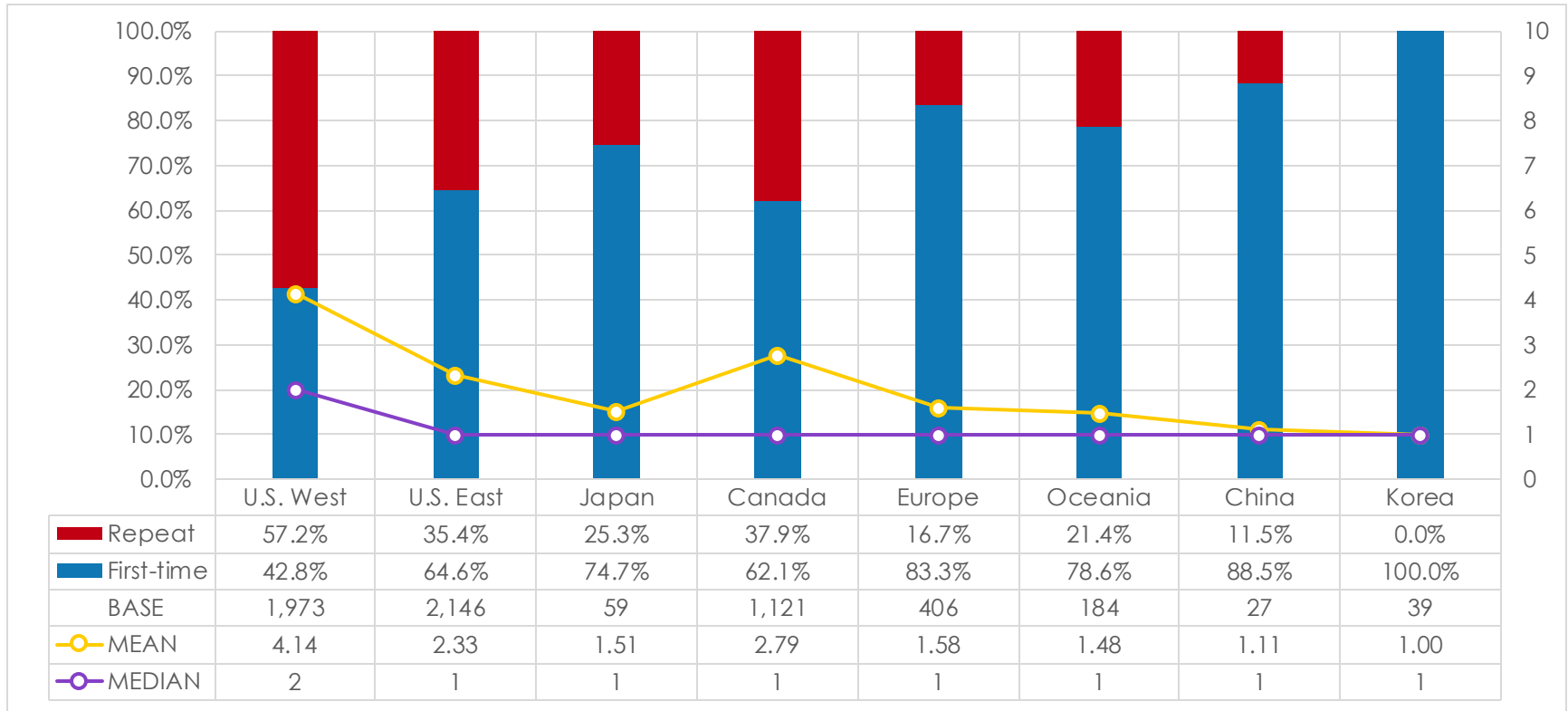
# IMPACT OF HAWAIIAN MUSIC – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents





# 1<sup>ST</sup> TIME VS REPEAT VISITOR - KAUA'I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - KAUA'I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Repeat visitors to Kauai from U.S. West, U.S. East, Japan, and Canada tend to be older, usually 55 or older.
- Among U.S. West visitors, the frequency of visits to Kaua'i was higher among those with a college degree.
- Repeat visitors to Kaua'i from U.S. West, U.S. East, and Canada were less likely to consult with a travel agent.
- More frequent visitors to Kaua'i from U.S. West and Japan were more likely to have been a part of smaller travel parties.
- Among U.S. visitors, males had a higher probability of being repeat visitors to the island than did females.
- Among visitors hailing from the U.S., the number of visits to Kaua'i increases as they become more affluent.

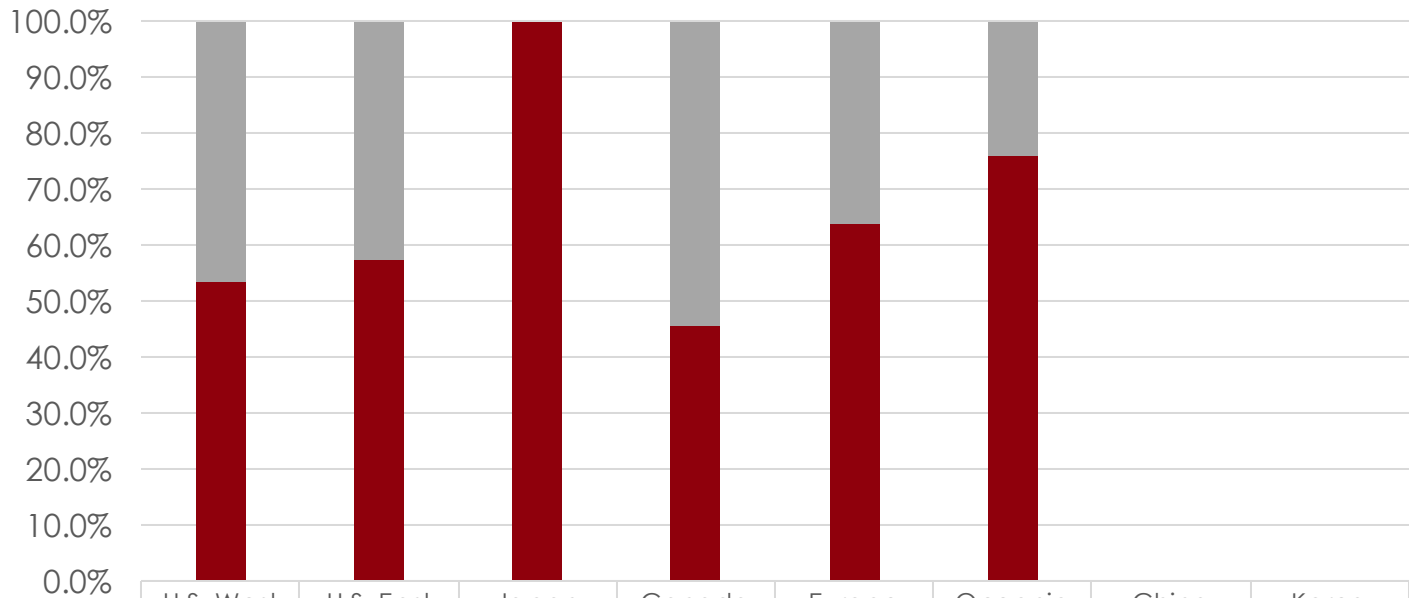
# ACCOMMODATIONS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Hotel</b>	32.9%	34.0%	37.3%	24.7%	49.7%	31.3%	56.1%	35.6%
<b>Condominium</b>	20.3%	10.6%	15.2%	18.5%	12.4%	9.6%	3.4%	0.0%
<b>Rental House</b>	4.7%	3.5%	1.8%	5.5%	4.8%	3.4%	0.0%	0.0%
<b>Timeshare Unit</b>	26.1%	16.5%	3.4%	18.6%	5.0%	6.6%	3.4%	0.0%
<b>Bed &amp; Breakfast</b>	0.4%	0.5%	0.0%	0.4%	3.0%	0.0%	0.0%	0.0%
<b>Cruise Ship</b>	5.1%	23.0%	10.2%	10.9%	8.9%	32.1%	21.6%	0.0%
<b>Friends or Relatives</b>	6.8%	3.9%	0.0%	3.3%	2.1%	1.9%	3.4%	0.0%
<b>Hostel</b>	0.2%	0.3%	1.7%	1.6%	2.2%	0.5%	0.0%	0.0%
<b>Camp Site, Beach</b>	1.2%	0.8%	0.0%	3.2%	2.5%	1.6%	0.0%	0.0%

# ACCOMMODATIONS - KAUA'I

Vacation rental/ Rental house/ Private room/ Shared room



■ Visitor area	46.4%	42.5%	0.0%	54.3%	36.3%	24.0%	0.0%	0.0%
■ Residential Neighborhood	53.6%	57.5%	100.0%	45.7%	63.7%	76.0%	0.0%	0.0%
BASE	459	409	1	388	94	20	0	0

# ACCOMMODATIONS - KAUA'I

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Location</b>	45.1%	43.0%	0.0%	39.0%	47.3%	46.2%	0.0%	0.0%
<b>Amenities like home (such as kitchen, gathering space, outdoor space, etc.)</b>	19.2%	19.4%	0.0%	21.0%	9.6%	20.8%	0.0%	0.0%
<b>Ability to have travel party members stay together</b>	16.8%	17.2%	0.0%	15.6%	13.1%	19.5%	0.0%	0.0%
<b>Price</b>	13.9%	15.5%	0.0%	21.8%	28.1%	13.6%	0.0%	0.0%
<b>Owned by self, friend or relative</b>	2.0%	2.2%	100.0%	0.6%	0.0%	0.0%	0.0%	0.0%
<b>Did not choose/part of package</b>	1.5%	0.5%	0.0%	0.3%	1.0%	0.0%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	36.5%	45.5%	44.1%	42.3%	58.7%	36.4%	37.2%	61.4%
Variety of activities/ attractions/ many choices	13.4%	17.8%	15.4%	14.3%	10.8%	21.5%	22.3%	18.3%
Beach/ ocean	13.7%	7.1%	15.2%	12.3%	4.4%	9.8%	6.8%	7.4%
Feeling of the "Aloha Spirit"	10.0%	7.5%	1.7%	8.4%	10.2%	5.0%	8.1%	0.0%
Local culture/ people/ music	5.9%	4.8%	6.7%	4.5%	3.4%	4.0%	6.8%	0.0%
Overall customer service/ hospitality/ the people	5.6%	5.0%	1.7%	4.9%	2.5%	6.1%	8.1%	10.4%
Events/ celebrations with friends/ family	2.8%	2.3%	1.7%	2.6%	1.7%	1.9%	0.0%	0.0%
Accommodations/ was as promised	2.5%	1.7%	1.8%	2.4%	1.8%	4.0%	0.0%	2.5%
Food/ restaurant variety/ dining options	2.6%	1.4%	0.0%	1.0%	1.2%	0.5%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

- Younger visitors (under 35 years old) from U.S. West, U.S. East, and Canada were more likely to list Kaua'i's natural beauty as a positive aspect of their trip compared to older visitors from these MMAs.
- Travelers from U.S. West, U.S. East, and Canada with a college degree were also more likely to single out the island's natural beauty compared to visitors from these markets without a college degree.
- Male visitors from U.S. West and U.S. East appreciated the wide variety of activities and attractions more so than their female counterparts.
- Kaua'i's natural beauty made more of an impression among visitors who also had the opportunity to visit other islands during their stay. This was the case among visitors from U.S. West, U.S. East, Canada, and Europe.

# AREAS OF OPPORTUNITIES - KAUA'I

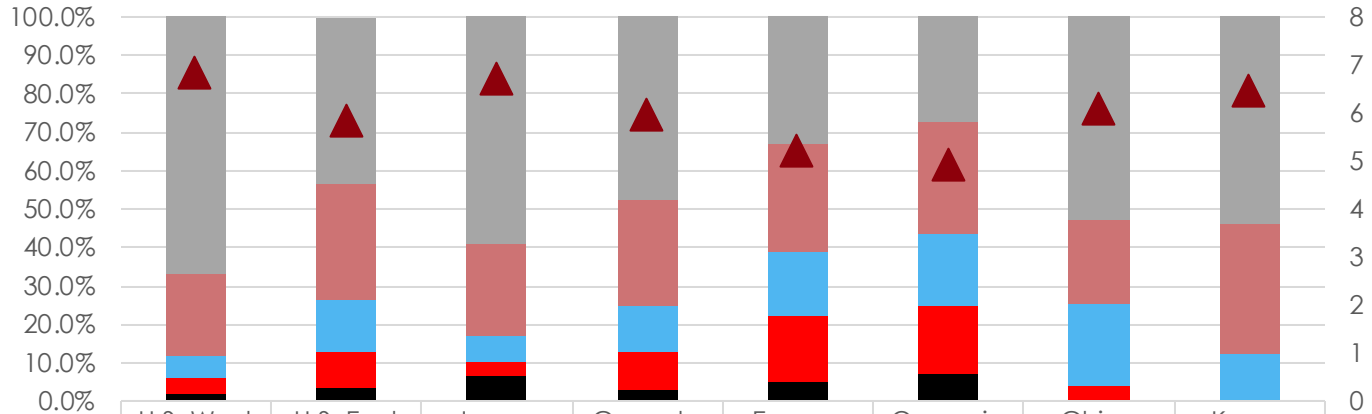
Caution small base: Japan, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	42.2%	52.5%	35.8%	39.0%	50.1%	50.8%	50.0%	44.1%
Traffic (congested/slow)	19.6%	13.0%	5.1%	17.2%	9.1%	8.0%	0.0%	5.0%
Driving experience	7.9%	6.0%	3.4%	4.8%	4.0%	3.6%	7.4%	0.0%
Would like to experience more local culture	5.0%	4.7%	10.1%	5.4%	5.6%	6.7%	7.4%	9.9%
Food/ restaurant variety/ dining options	3.9%	3.7%	6.7%	4.2%	7.3%	6.1%	4.1%	13.4%
Rental car experience	3.4%	2.1%	1.7%	2.8%	2.3%	2.2%	3.4%	0.0%
Availability of ground transportation	1.8%	2.1%	13.5%	3.3%	3.8%	6.1%	6.8%	5.0%
Food/ restaurant quality	1.6%	1.7%	10.1%	1.9%	3.0%	2.2%	3.4%	5.4%
Accommodations/ not as promised	2.1%	1.3%	1.7%	2.3%	1.3%	1.0%	3.4%	0.0%



# LIKELIHOOD OF RETURN VISIT – KAUA‘I

8-pt Rating Scale  
8=V ery Likely / 1=V ery Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	66.8%	43.2%	59.3%	47.7%	33.2%	27.5%	52.7%	54.0%
■ Somewhat likely (5-6)	21.6%	30.4%	23.8%	27.5%	28.1%	28.9%	22.3%	33.7%
■ Somewhat unlikely (3-4)	5.6%	13.5%	6.8%	12.2%	16.3%	19.1%	21.0%	12.4%
■ Very unlikely (1-2)	4.3%	9.4%	3.4%	9.7%	17.1%	17.7%	4.1%	0.0%
■ Not sure	1.7%	3.4%	6.7%	3.0%	5.3%	6.9%	0.0%	0.0%
BASE	1,954	2,121	59	1,108	395	184	27	39
▲ MEAN	6.82	5.82	6.69	5.97	5.19	4.90	6.10	6.47

# LIKELIHOOD OF RETURN VISIT – KAUA'I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- The likelihood of returning to Kauai was highest among U.S. West and Japanese visitors and unlikely among visitors from Europe and Oceania.
- Those who traveled alone on this most recent trip were most likely to express a desire to return to Kauai from U.S. West and U.S. East.
- When segmented by educational background we find those visitors without a college degree from U.S. West, U.S. East, and Canada were more likely to indicate they would return to Kaua'i than were those with a college degree from these areas.
- When segmented by repeat vs first-time visitors to Kaua'i from the U.S. we find that first-time visitors focus more on the natural beauty of the island and the variety of activities when asked about positive aspects of their trip while repeat visitors place a greater emphasis on things like the aloha spirit, the hospitality of the locals they come into contact with, and local culture.

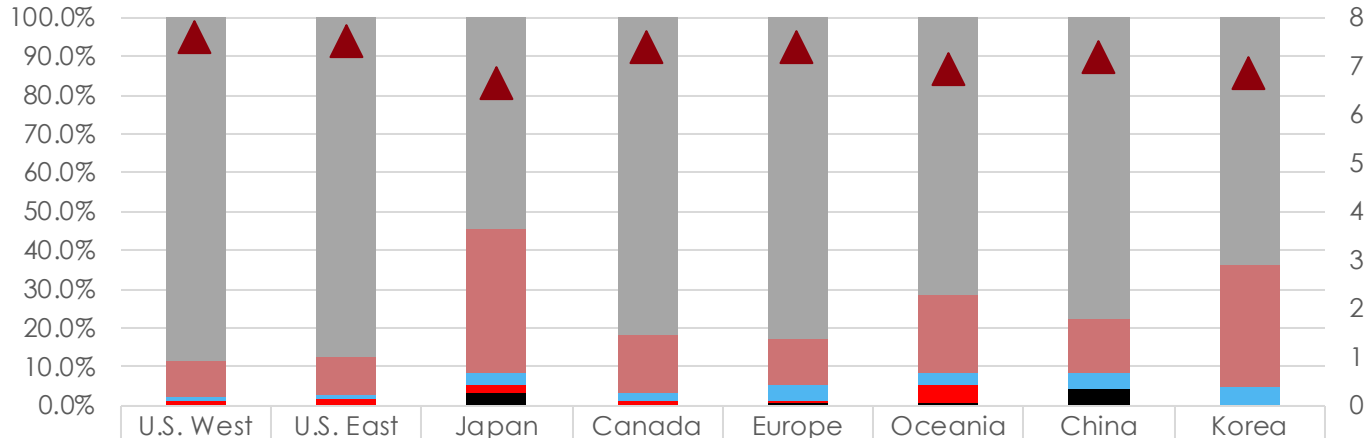
# REASONS FOR NOT RETURNING - KAUA'I

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Want to go someplace new</b>	48.1%	53.1%	29.9%	52.7%	42.3%	56.9%	83.8%	40.0%
<b>Too expensive/cost</b>	18.4%	29.5%	0.0%	28.8%	42.3%	18.4%	13.5%	20.0%
<b>Flight too long</b>	4.8%	31.0%	0.0%	18.1%	61.8%	8.5%	13.5%	20.0%
<b>No reason to return/ nothing new</b>	10.6%	9.7%	19.9%	10.6%	12.6%	23.4%	29.7%	20.0%
<b>Other financial obligations</b>	6.2%	12.5%	30.3%	9.8%	6.7%	3.7%	0.0%	20.0%
<b>Not enough value for the price</b>	7.5%	6.2%	0.0%	9.2%	5.9%	9.6%	13.5%	0.0%
<b>Poor health/ age restriction</b>	4.8%	5.8%	10.0%	5.2%	1.8%	2.6%	0.0%	0.0%
<b>Too crowded/ congested/ traffic</b>	4.8%	4.1%	0.0%	4.1%	1.2%	1.1%	0.0%	0.0%
<b>Nothing to do/ boring</b>	2.6%	3.3%	0.0%	2.9%	1.4%	2.2%	0.0%	20.0%
<b>Inconvenient travel connections</b>	1.3%	2.9%	10.0%	3.6%	1.2%	3.3%	0.0%	0.0%

# KAUA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	88.6%	87.4%	54.4%	81.9%	82.8%	71.4%	77.7%	63.9%
■ Somewhat likely (5-6)	9.1%	9.8%	37.1%	14.9%	11.8%	20.2%	14.2%	31.2%
■ Somewhat unlikely (3-4)	1.1%	1.2%	3.4%	2.2%	4.1%	3.2%	4.1%	5.0%
■ Very unlikely (1-2)	0.9%	1.6%	1.8%	0.9%	0.8%	4.7%	0.0%	0.0%
■ Not sure	0.3%	0.1%	3.4%	0.1%	0.5%	0.5%	4.1%	0.0%
BASE	1,946	2,114	59	1,103	392	184	27	39
▲ MEAN	7.56	7.49	6.61	7.37	7.36	6.92	7.16	6.84

# KAUA'I - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Female visitors from U.S. West and U.S. East were stronger advocates for Kaua'i than are males from these visitor markets.
- Among visitors from U.S. East, young travelers under the age of 35 are the strongest advocates for Kaua'i.
- Among visitors from U.S. West we find those who visited just Kaua'i were stronger advocates than were visitors from this MMA who also ventured to another island during their trip.

## KAUA'I ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.8%	96.8%	100.0%	96.7%	97.7%	96.0%	100.0%	97.5%
<b>On own (self-guided)</b>	87.0%	74.1%	44.1%	83.4%	81.9%	49.9%	62.8%	51.0%
<b>Helicopter/ airplane</b>	13.4%	23.7%	5.1%	19.2%	31.6%	20.6%	11.5%	7.9%
<b>Boat/ submarine/ whale</b>	29.1%	30.7%	13.5%	26.6%	30.4%	22.0%	15.5%	7.4%
<b>Visit towns</b>	61.7%	53.9%	27.1%	60.6%	42.0%	43.8%	17.6%	14.9%
<b>Limo/ van/ bus tour</b>	4.7%	13.4%	28.7%	7.3%	6.8%	24.6%	11.5%	25.7%
<b>Scenic views/ natural landmark</b>	68.8%	70.3%	37.2%	72.8%	74.3%	56.8%	66.2%	56.4%
<b>Movie/ TV/ film location</b>	6.0%	6.7%	3.4%	4.6%	3.4%	7.5%	11.5%	19.8%

Caution small base: Japan, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.9%	94.2%	93.3%	98.4%	95.2%	85.1%	88.5%	84.2%
<b>Beach/ sunbathing</b>	81.3%	71.9%	45.9%	86.3%	78.2%	52.4%	61.5%	51.5%
<b>Bodyboard/ Standup paddle board</b>	13.4%	6.9%	0.0%	15.8%	6.5%	5.6%	0.0%	2.5%
<b>Surfing</b>	7.3%	4.6%	1.7%	10.1%	8.0%	2.1%	0.0%	7.9%
<b>Canoeing/ kayak</b>	14.0%	10.8%	1.7%	12.1%	9.3%	7.4%	3.4%	2.5%
<b>Swim- ocean</b>	64.9%	51.6%	18.6%	71.5%	63.5%	43.5%	18.9%	18.3%
<b>Snorkel</b>	45.9%	32.7%	8.4%	49.5%	42.0%	24.1%	23.0%	22.8%
<b>Windsurf/ Kitesurf</b>	0.2%	0.1%	0.0%	0.0%	0.2%	0.5%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.2%	0.2%	0.0%	0.1%	0.5%	0.6%	0.0%	2.5%
<b>Scuba</b>	2.3%	2.3%	3.4%	2.6%	2.3%	0.0%	0.0%	2.5%
<b>Fishing</b>	3.5%	2.1%	0.0%	1.9%	0.0%	0.6%	0.0%	0.0%
<b>Golf</b>	8.2%	6.5%	6.7%	8.2%	3.2%	3.6%	0.0%	3.0%

Caution small base: Japan, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.9%	94.2%	93.3%	98.4%	95.2%	85.1%	88.5%	84.2%
<b>Run/ Jog/ Fitness walk</b>	27.6%	20.1%	8.4%	27.7%	14.7%	14.8%	6.8%	2.5%
<b>Spa</b>	9.1%	7.2%	5.1%	3.7%	5.1%	2.7%	3.4%	5.0%
<b>Hiking</b>	53.4%	47.4%	13.5%	56.3%	55.0%	23.6%	25.7%	12.9%
<b>Backpack/Camp</b>	2.4%	2.2%	1.7%	4.0%	4.6%	1.1%	3.4%	2.5%
<b>Agritourism</b>	11.3%	12.0%	15.2%	9.3%	3.8%	6.8%	23.6%	30.2%
<b>Sport event/ tournament</b>	0.8%	0.7%	3.4%	1.0%	0.0%	1.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	38.5%	41.0%	25.4%	40.2%	36.5%	31.5%	36.5%	9.9%
<b>Waterpark</b>	0.9%	0.3%	3.4%	0.6%	0.5%	0.5%	11.5%	0.0%
<b>Mountain tube/ waterfall rappel</b>	8.3%	6.6%	0.0%	6.5%	5.1%	11.6%	0.0%	0.0%
<b>Zip-lining</b>	8.4%	5.4%	0.0%	3.7%	3.0%	5.9%	0.0%	2.5%
<b>Skydiving</b>	0.5%	0.3%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	5.3%	4.5%	1.7%	4.7%	1.8%	3.1%	14.9%	5.0%
<b>Horseback riding</b>	2.5%	2.6%	0.0%	1.8%	1.2%	1.1%	4.1%	0.0%



# KAUA'I ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.0%	93.0%	96.6%	96.2%	96.2%	91.2%	92.6%	89.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	22.3%	25.8%	20.4%	20.7%	27.2%	18.8%	40.5%	12.9%
<b>Live music/ stage show</b>	28.1%	27.9%	13.6%	24.8%	18.2%	13.5%	10.8%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.2%	4.5%	3.4%	4.4%	3.6%	2.1%	7.4%	0.0%
<b>Fine dining</b>	53.6%	44.4%	32.1%	40.8%	34.2%	18.9%	14.2%	7.9%
<b>Family restaurant</b>	59.1%	49.6%	10.2%	54.8%	39.2%	44.4%	14.9%	20.8%
<b>Fast food</b>	29.7%	22.1%	27.2%	36.0%	37.9%	25.8%	24.3%	54.0%
<b>Food truck</b>	36.7%	29.5%	6.8%	39.8%	32.8%	21.4%	25.0%	30.7%
<b>Café/ coffee house</b>	43.7%	35.6%	42.3%	48.5%	46.0%	45.6%	33.1%	25.7%
<b>Ethnic dining</b>	28.3%	25.7%	6.7%	21.0%	15.6%	7.1%	3.4%	12.4%
<b>Prepared own meal</b>	61.3%	37.8%	16.9%	66.7%	39.8%	35.2%	8.1%	7.4%

Caution small base: Japan, China, and Korea less than 100 respondents

## KAUA'I ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.4%	90.6%	91.4%	94.7%	94.3%	90.1%	85.1%	75.8%
<b>Mall/ department store</b>	25.3%	18.6%	37.2%	37.1%	32.4%	27.2%	29.7%	19.8%
<b>Designer boutique</b>	17.8%	14.7%	1.7%	14.8%	7.2%	9.6%	0.0%	0.0%
<b>Hotel/ resort store</b>	23.3%	23.6%	10.1%	16.8%	13.2%	14.0%	17.6%	7.9%
<b>Swap meet/ flea market</b>	8.3%	6.4%	1.8%	7.3%	3.3%	5.8%	0.0%	0.0%
<b>Discount/ outlet store</b>	12.6%	10.5%	1.7%	14.0%	6.6%	11.4%	11.5%	12.4%
<b>Supermarket</b>	71.6%	52.4%	49.2%	70.7%	70.9%	48.1%	47.3%	43.1%
<b>Farmer's market</b>	44.5%	30.2%	10.2%	47.5%	31.3%	24.2%	6.8%	3.0%
<b>Convenience store</b>	39.6%	35.7%	13.6%	38.7%	25.6%	33.6%	36.5%	20.3%
<b>Duty free store</b>	1.8%	2.1%	10.2%	2.1%	0.5%	1.8%	3.4%	5.0%
<b>Local shop/ artisan</b>	72.9%	69.2%	30.4%	71.2%	63.0%	61.2%	26.3%	14.9%

Caution small base: Japan, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	63.0%	63.2%	69.5%	61.5%	48.9%	50.6%	85.8%	53.5%
<b>Historic military site</b>	5.0%	6.0%	17.0%	4.6%	4.6%	2.2%	10.8%	2.5%
<b>Other historical site</b>	25.8%	26.9%	28.7%	27.2%	22.1%	28.3%	22.3%	30.2%
<b>Museum/ art gallery</b>	15.6%	11.1%	6.8%	13.5%	8.8%	10.4%	26.3%	5.4%
<b>Luau/ Polynesian show/ hula show</b>	25.4%	30.8%	15.2%	26.0%	18.3%	14.9%	10.8%	5.0%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.3%	4.6%	15.4%	3.4%	3.3%	3.8%	15.5%	2.5%
<b>Play/ concert/ theatre</b>	3.4%	2.6%	3.4%	2.3%	1.2%	0.0%	0.0%	0.0%
<b>Art/ craft fair</b>	17.8%	11.7%	3.4%	16.0%	7.6%	8.7%	11.5%	10.9%
<b>Festival event</b>	4.6%	3.1%	1.8%	3.7%	2.6%	3.1%	0.0%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.1%	94.5%	98.3%	95.3%	96.0%	93.8%	96.6%	95.0%
<b>Airport shuttle</b>	14.6%	11.3%	6.8%	13.7%	11.1%	14.6%	7.4%	5.0%
<b>Trolley</b>	0.5%	3.3%	3.4%	2.0%	0.8%	5.3%	0.0%	0.0%
<b>Public bus</b>	0.7%	1.8%	1.8%	2.9%	3.9%	9.0%	6.8%	2.5%
<b>Tour bus/ tour van</b>	6.2%	19.7%	40.6%	10.7%	9.8%	30.4%	23.0%	58.9%
<b>Taxi/ limo</b>	2.1%	4.3%	17.0%	5.4%	6.7%	14.6%	14.9%	2.5%
<b>Rental car</b>	88.9%	72.2%	45.8%	83.9%	82.2%	48.4%	55.4%	31.2%
<b>Ride share</b>	5.1%	7.4%	0.0%	5.0%	5.1%	5.8%	10.8%	2.5%
<b>Bicycle rental</b>	4.6%	2.5%	0.0%	6.0%	3.0%	1.6%	3.4%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents

## KAUA'I ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	20.2%	12.6%	8.5%	13.5%	6.9%	6.8%	12.2%	12.9%
<b>Visit friends/ family</b>	19.5%	11.8%	6.7%	12.7%	6.4%	6.8%	8.1%	12.9%
<b>Volunteer- non-profit</b>	0.9%	0.9%	1.8%	1.0%	0.5%	0.0%	4.1%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents

# ATTRACTIONS – KAUA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Fern Grotto</b>	9.7%	12.6%	52.4%	11.1%	9.1%	13.8%	8.1%	5.0%
<b>Hanalei Town</b>	55.8%	43.7%	16.8%	55.2%	54.5%	35.7%	21.6%	17.8%
<b>Hanalei Beach</b>	49.2%	39.5%	18.5%	55.9%	56.4%	35.8%	49.3%	20.3%
<b>Kalalau Trail</b>	10.5%	10.8%	8.4%	18.7%	21.4%	5.3%	10.8%	5.0%
<b>Kalapaki Beach</b>	25.5%	24.6%	10.1%	30.1%	26.0%	22.8%	33.8%	7.9%
<b>Bike Path in Kapaa</b>	9.8%	7.2%	3.4%	12.4%	6.1%	3.7%	3.4%	5.0%
<b>Kaua'i Museum</b>	6.1%	3.1%	5.1%	4.3%	3.7%	1.8%	7.4%	2.5%
<b>Ke'e Beach</b>	10.5%	7.0%	1.7%	13.7%	16.8%	3.7%	7.4%	2.5%
<b>Kilauea Lighthouse</b>	35.1%	32.0%	6.7%	36.2%	35.6%	23.8%	25.0%	22.3%
<b>Koke'e</b>	9.1%	9.5%	6.7%	16.0%	19.8%	2.9%	14.2%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents

# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Koke'e Museum</b>	4.2%	3.3%	1.8%	4.8%	3.3%	1.5%	3.4%	0.0%
<b>Na Aina Kai Gardens</b>	2.4%	2.0%	1.7%	2.1%	2.0%	1.6%	0.0%	2.5%
<b>Napali Coast</b>	42.3%	53.4%	16.9%	48.5%	57.9%	49.7%	25.0%	20.3%
<b>Allerton Garden</b>	9.8%	8.8%	8.5%	8.1%	8.7%	5.6%	10.8%	0.0%
<b>Limahuli Garden</b>	4.1%	4.5%	8.5%	3.9%	4.4%	3.2%	10.8%	0.0%
<b>Old Koloa Town</b>	42.3%	29.9%	6.8%	42.1%	28.7%	23.0%	14.9%	15.8%
<b>Opaeka'a Falls</b>	29.3%	30.0%	11.9%	35.6%	39.8%	27.4%	30.4%	7.4%

Caution small base: Japan, China, and Korea less than 100 respondents

## ATTRACTIONS – KAUA‘I (cont.)

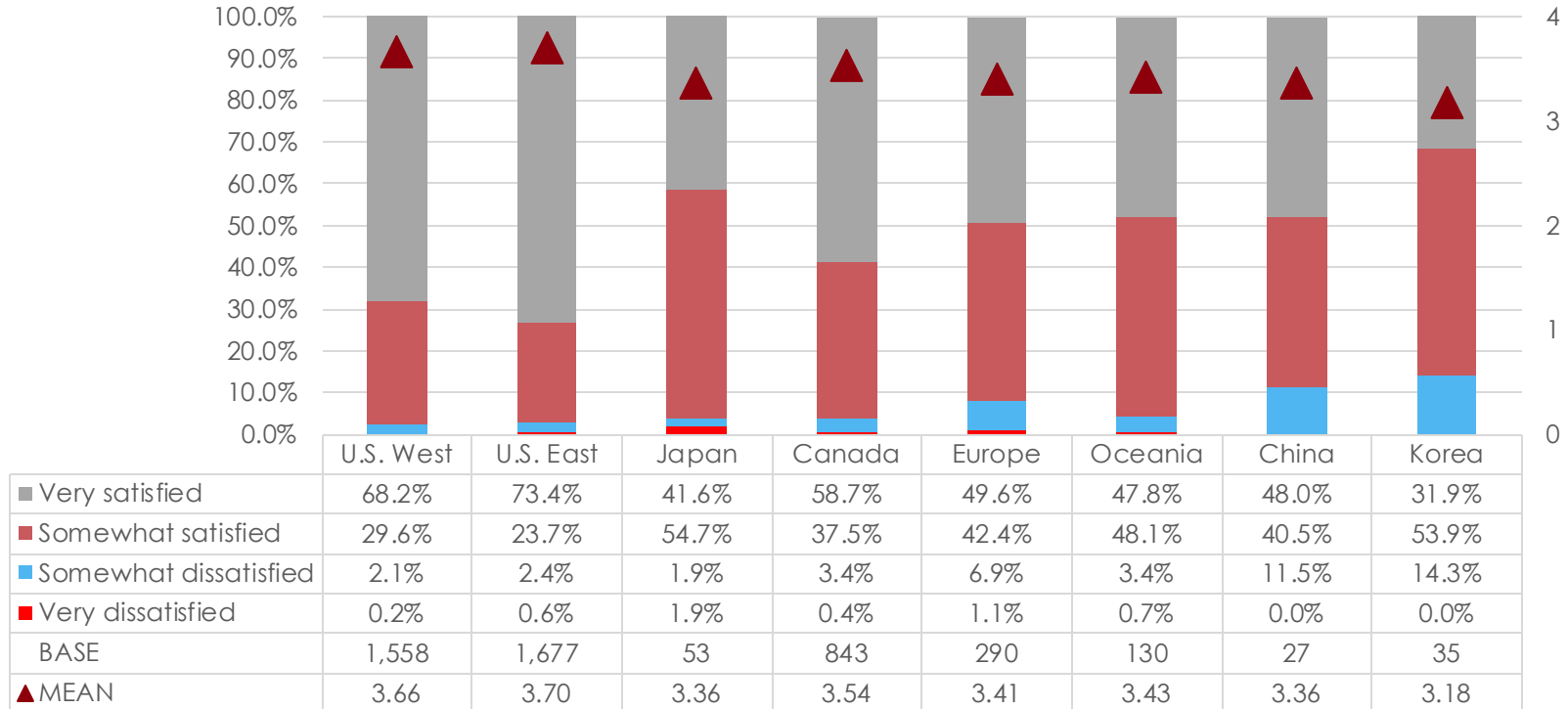
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Po‘ipu Beach</b>	66.3%	50.1%	33.8%	65.7%	59.4%	32.3%	33.1%	41.6%
<b>Smith’s Tropical Paradise Gardens</b>	9.2%	10.2%	0.0%	7.4%	5.9%	2.2%	7.4%	0.0%
<b>Spouting Horn</b>	40.6%	37.4%	5.1%	45.6%	36.9%	29.1%	27.0%	13.4%
<b>Wailua Falls</b>	41.7%	42.4%	42.2%	51.0%	57.9%	39.0%	29.1%	35.6%
<b>Wailua River</b>	26.2%	25.5%	27.0%	28.6%	32.8%	21.1%	14.2%	12.9%
<b>Waimea Canyon</b>	54.6%	63.2%	60.8%	67.8%	69.5%	60.7%	58.8%	62.9%
<b>Disc Golf</b>	0.4%	0.3%	0.0%	1.0%	0.3%	0.5%	4.1%	0.0%
<b>Mini Golf</b>	2.5%	2.0%	1.7%	3.3%	1.0%	1.1%	4.1%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents



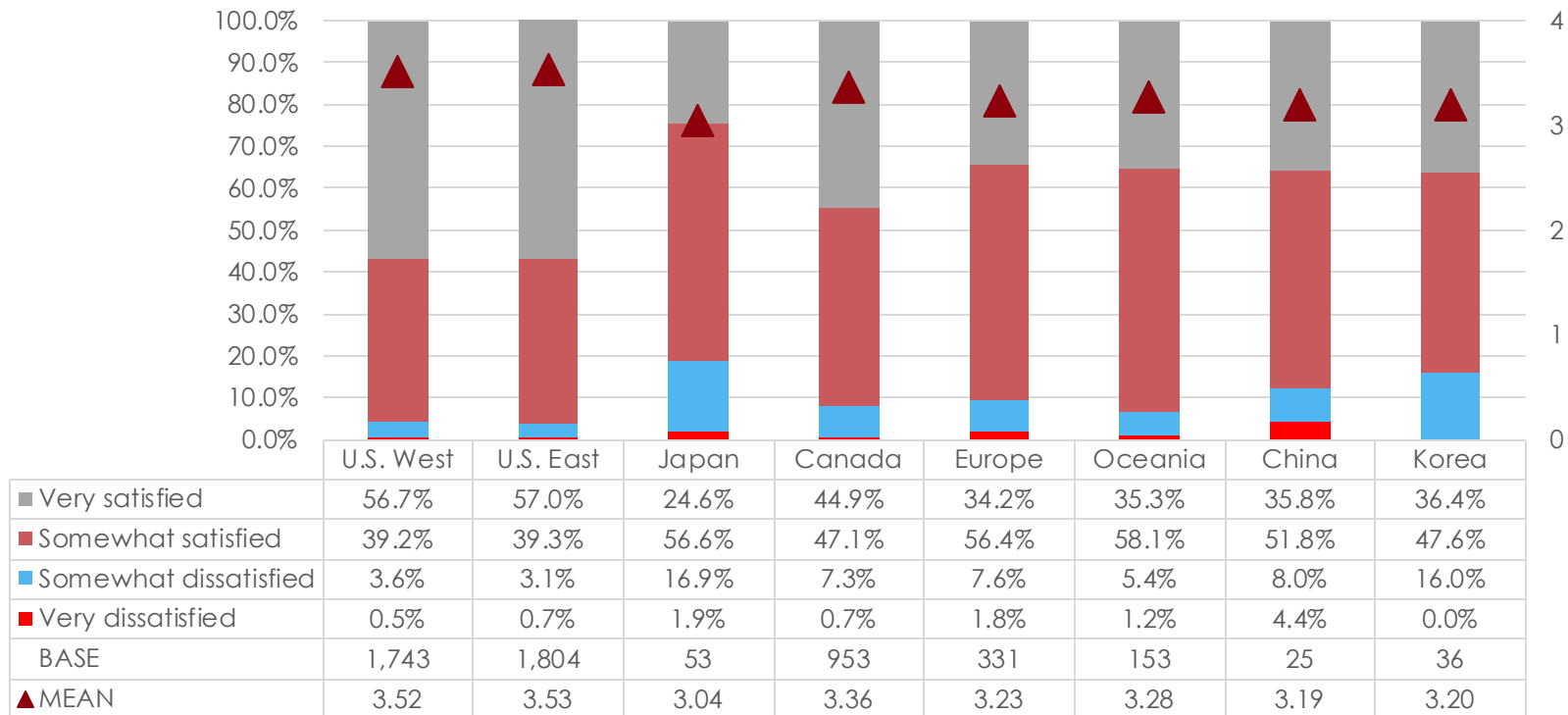
# SATISFACTION – ENTERTAINMENT

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



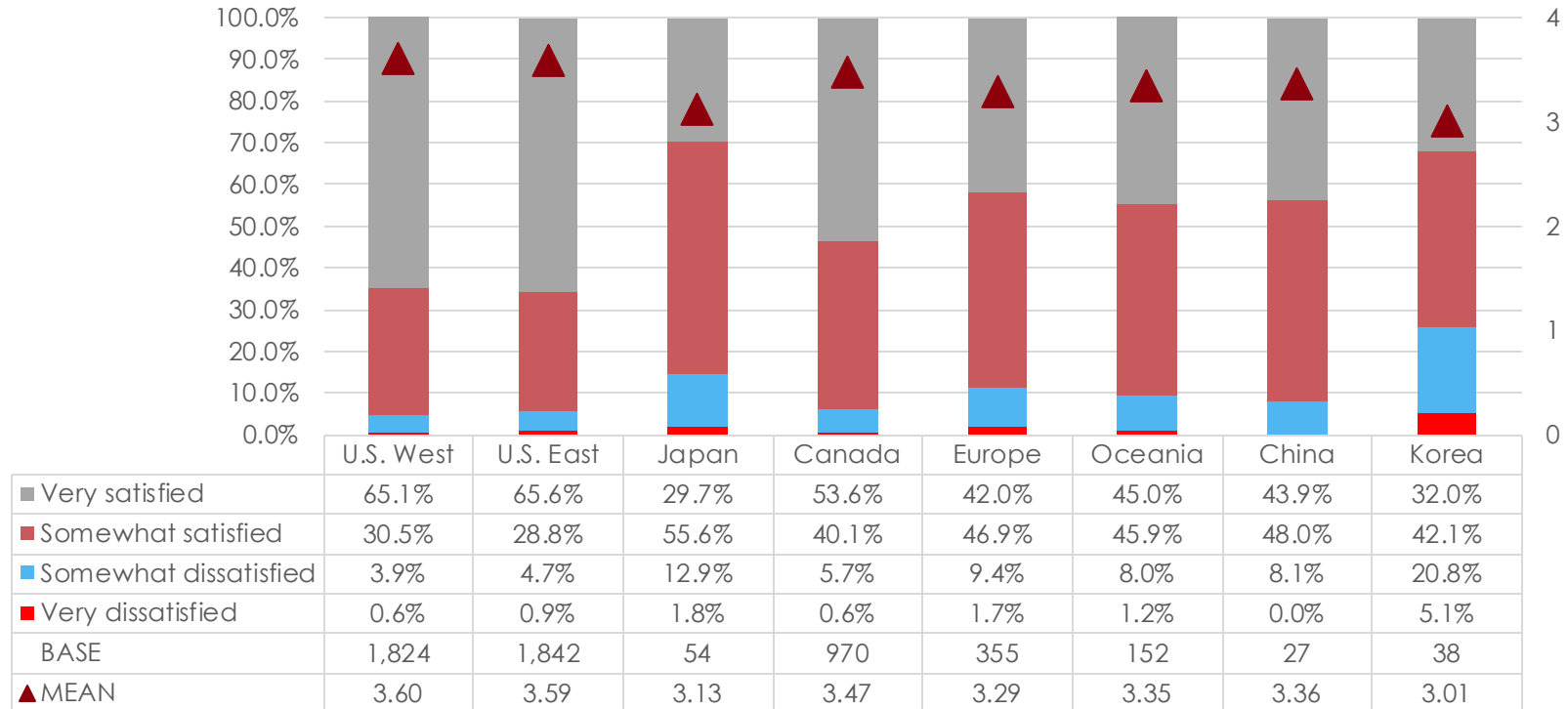
# SATISFACTION – SHOPPING

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



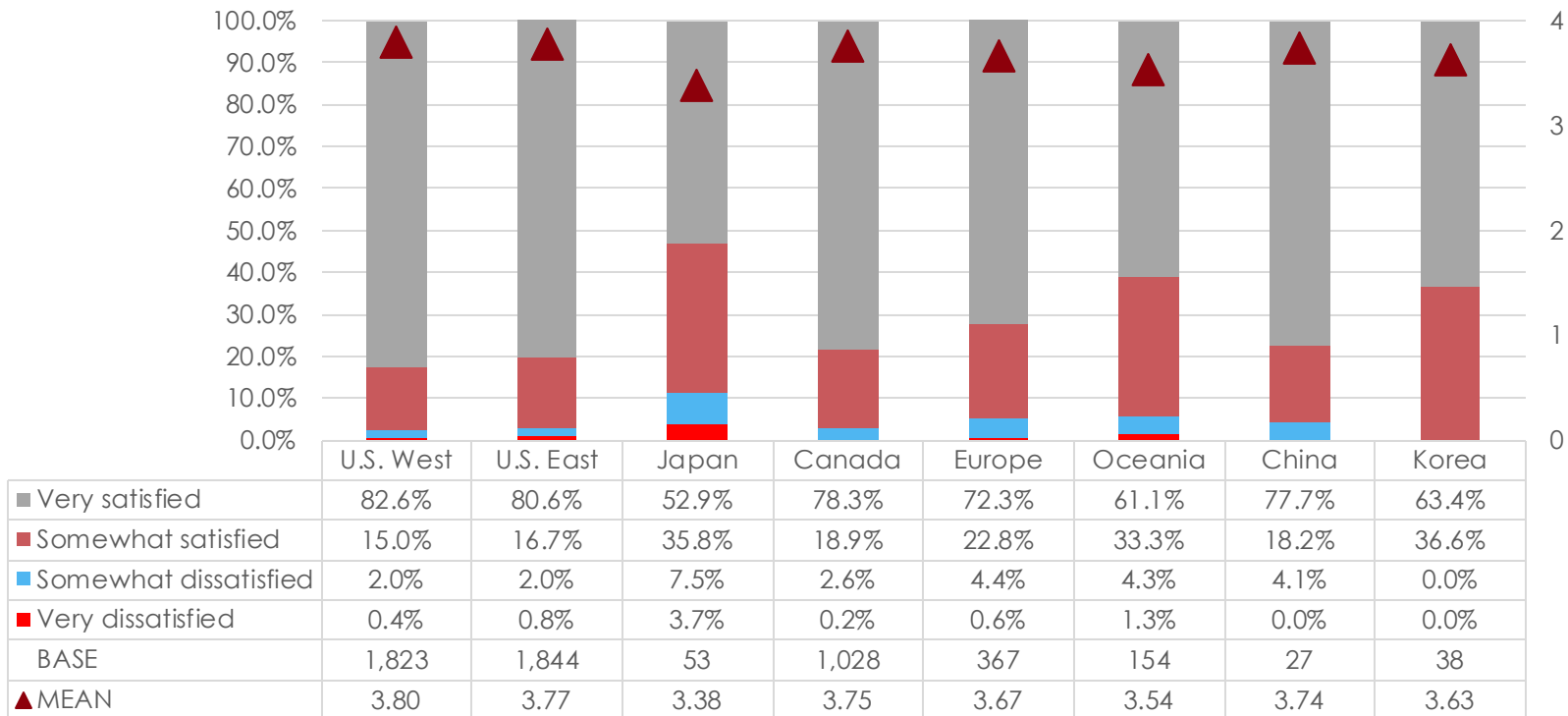
# SATISFACTION – DINING

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



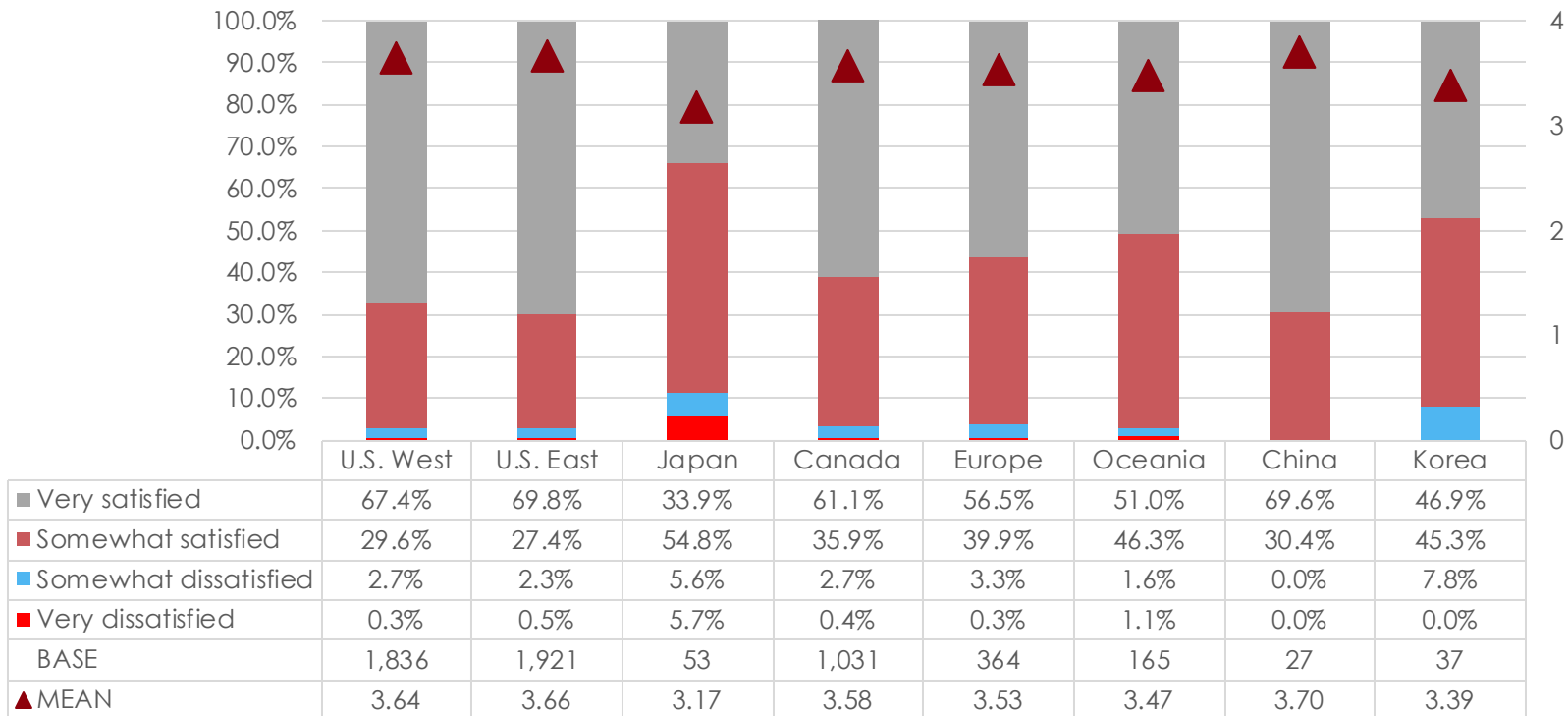
# SATISFACTION – BEACHES

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



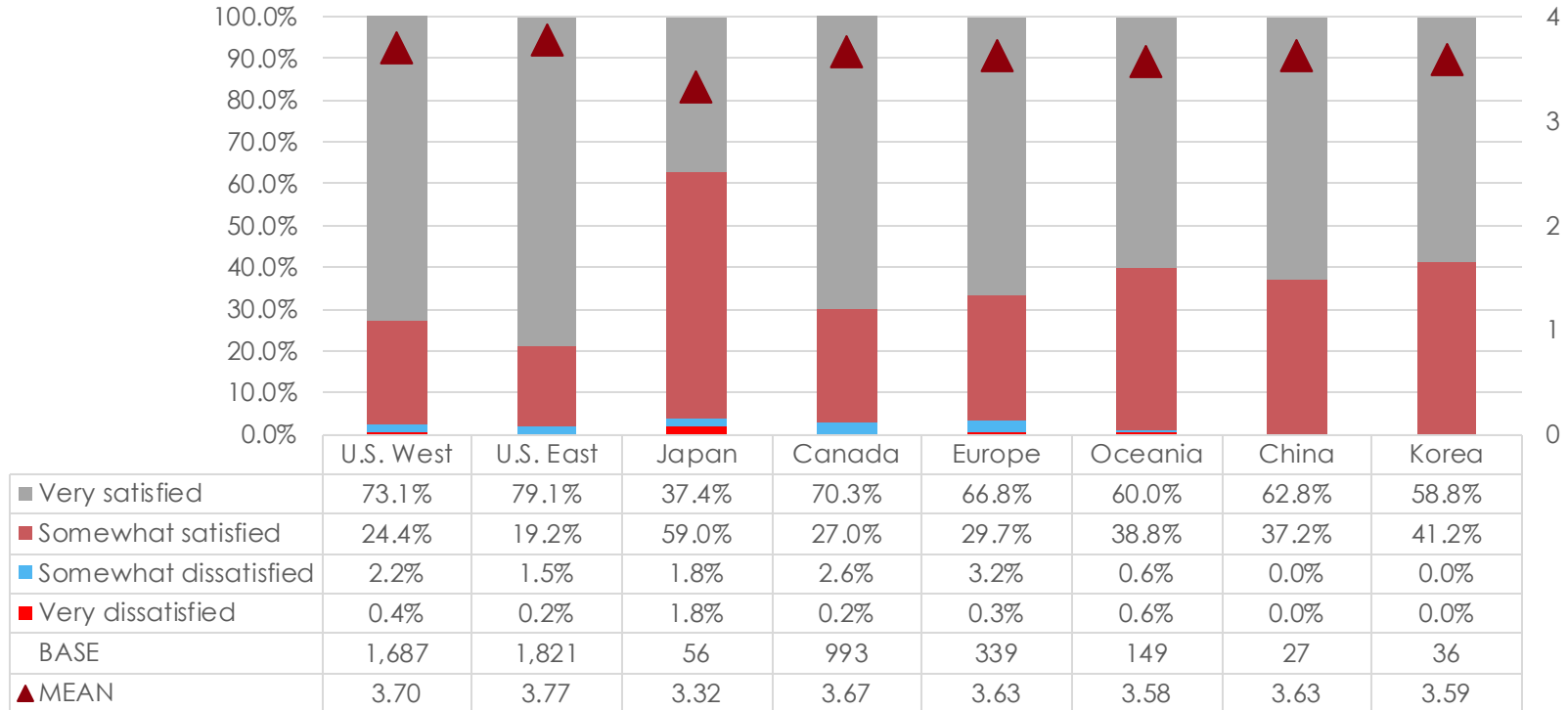
# SATISFACTION – PUBLIC AREAS

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



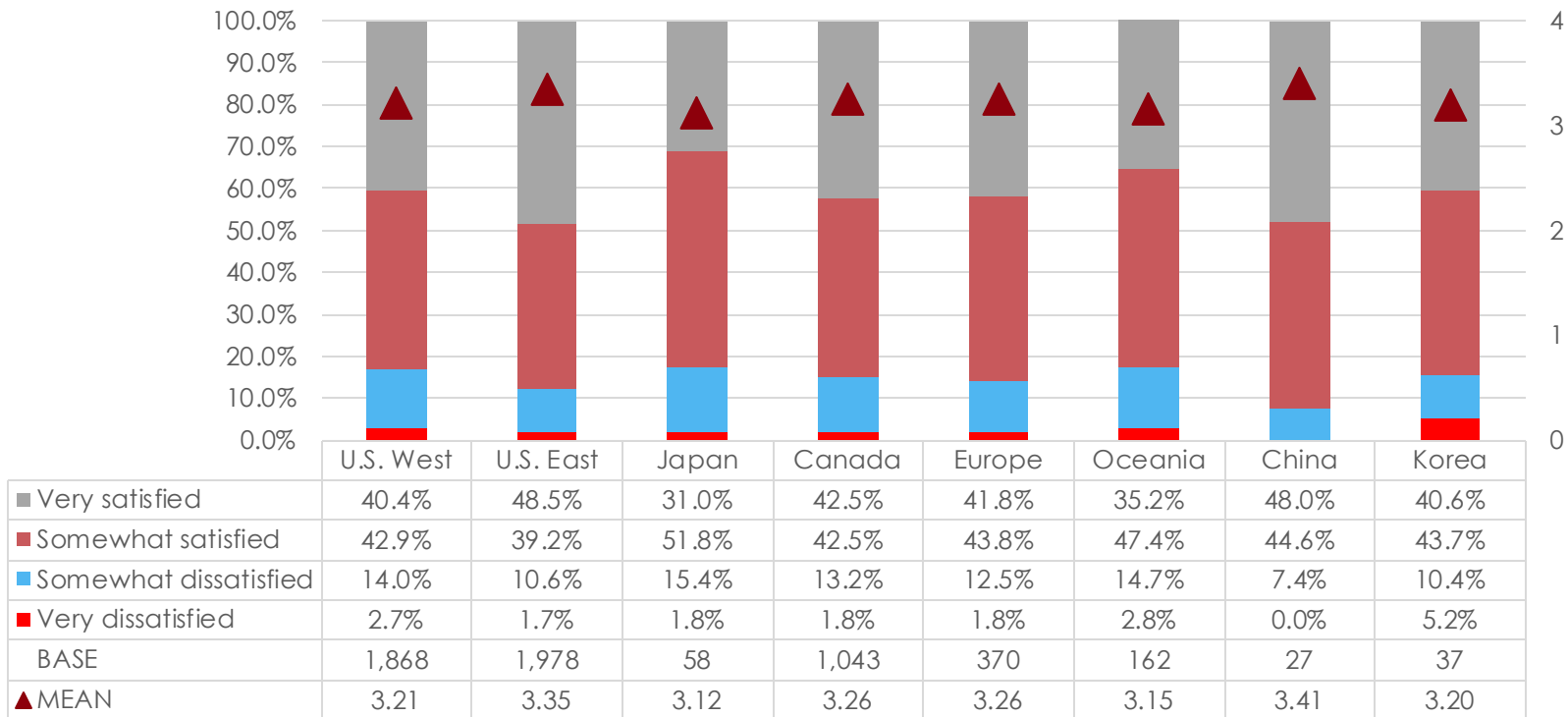
# SATISFACTION – PARKS

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



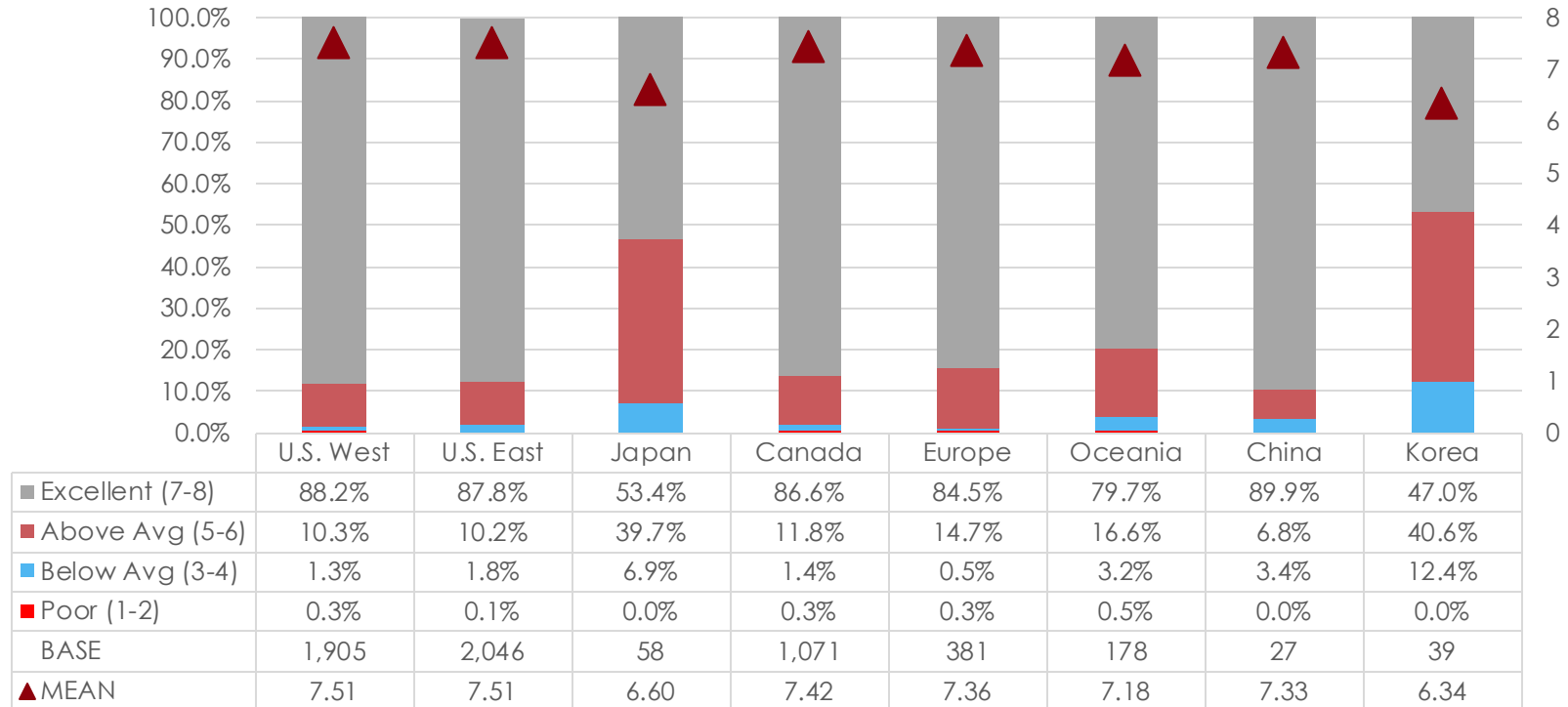
# SATISFACTION – ROADS

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



# FRIENDLINESS OF KAUA'I RESIDENTS

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





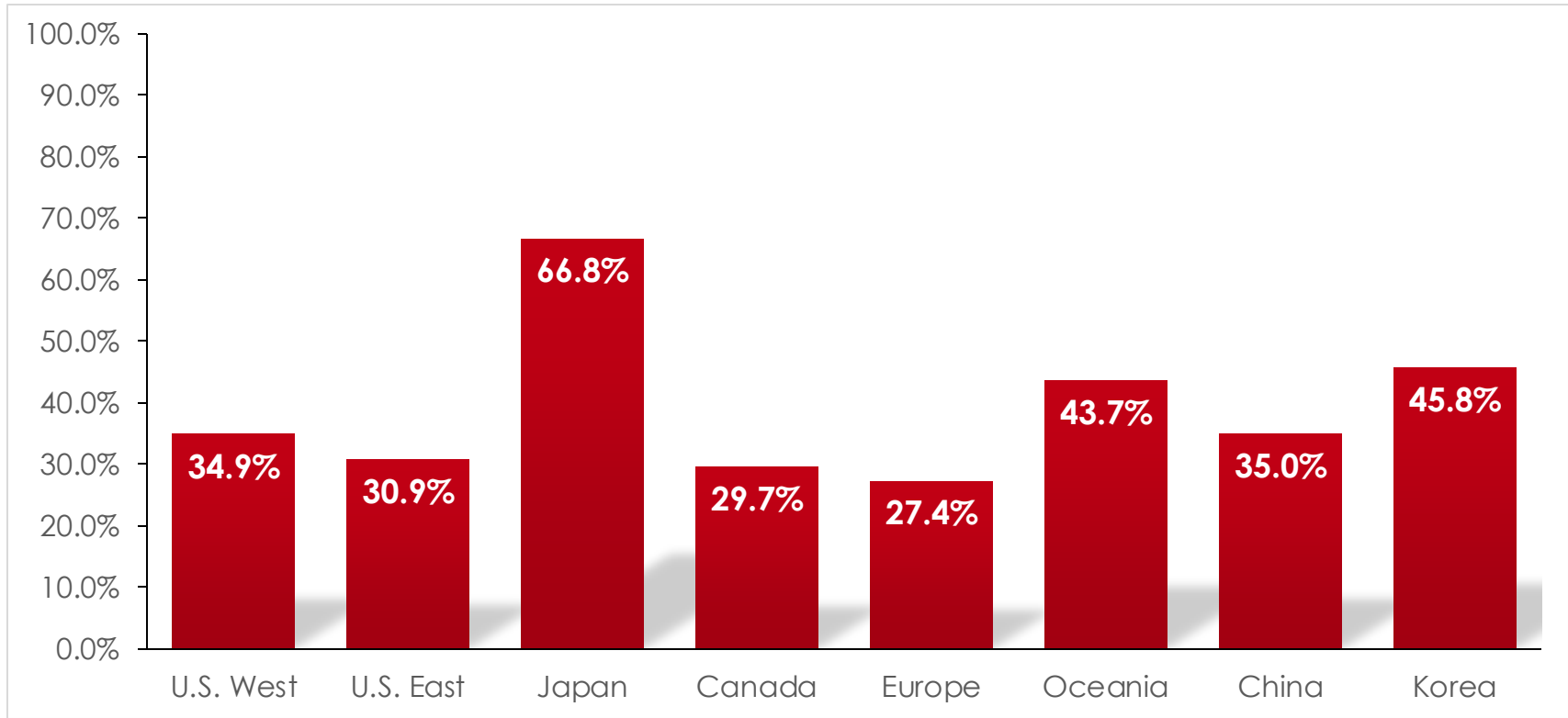
## TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Been here before</b>	46.1%	26.7%	10.3%	29.8%	11.8%	14.8%	7.4%	0.0%
<b>Friend recommendation</b>	28.4%	26.7%	34.5%	31.9%	32.4%	21.4%	37.8%	26.2%
<b>Cruise line stop</b>	3.3%	18.7%	8.6%	8.4%	7.2%	29.4%	10.1%	0.0%
<b>Article/ Blog</b>	2.7%	4.1%	10.4%	5.6%	13.8%	2.9%	6.8%	15.8%
<b>Attending Conference/ Event</b>	3.3%	3.0%	3.4%	2.4%	1.3%	1.2%	0.0%	0.0%
<b>Travel Agent</b>	0.9%	4.3%	10.3%	1.8%	13.0%	9.9%	4.1%	32.7%
<b>Visiting Family/ Friends</b>	2.6%	2.4%	1.8%	2.6%	0.8%	1.8%	0.0%	2.5%
<b>Location/ Never been, but went to other islands</b>	2.2%	1.9%	0.0%	3.2%	1.3%	1.0%	0.0%	0.0%

Caution small base: Japan, China, and Korea less than 100 respondents

# SECTION – ISLAND OF HAWAI‘I

# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



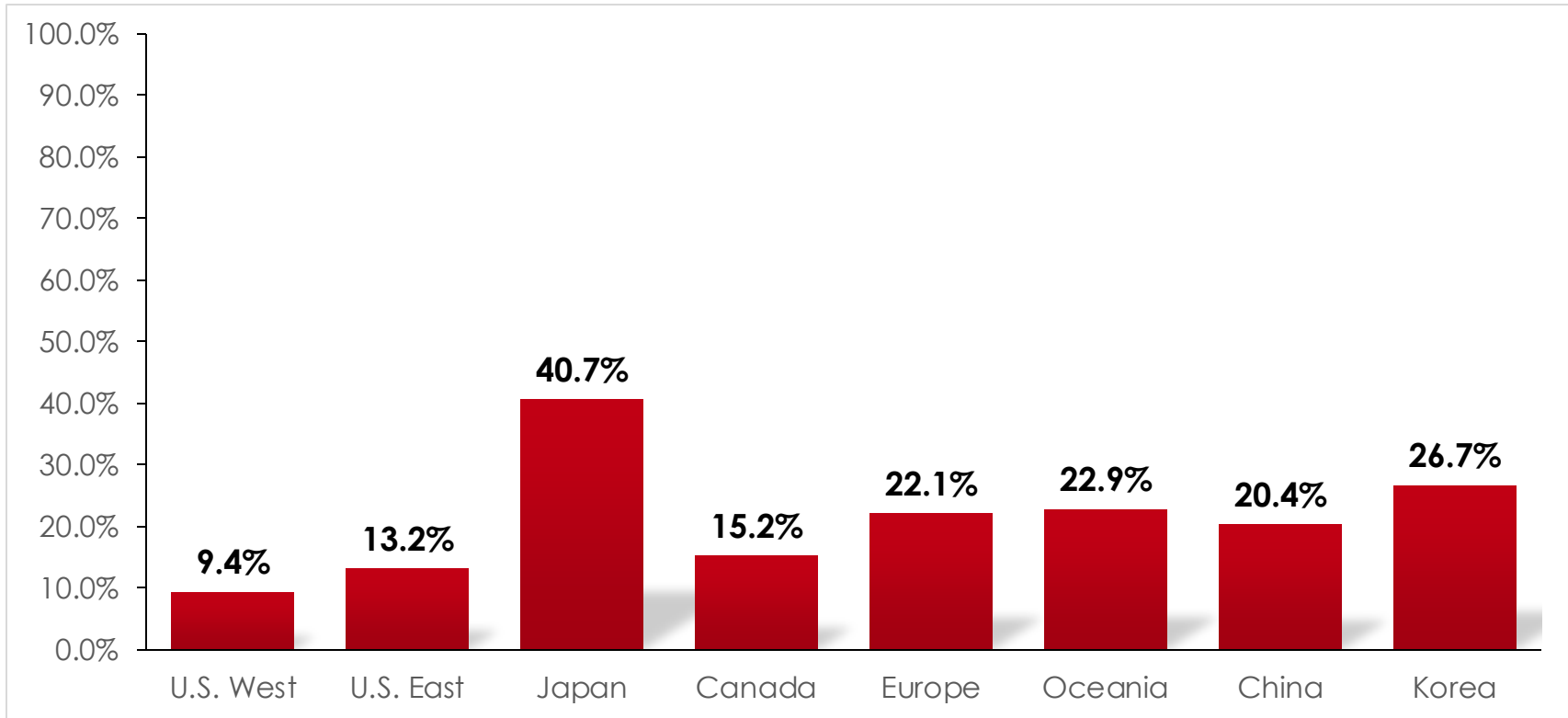
475 Q. Do you remember seeing or hearing advertising for the island of Hawai'i prior to your arrival?

[A]

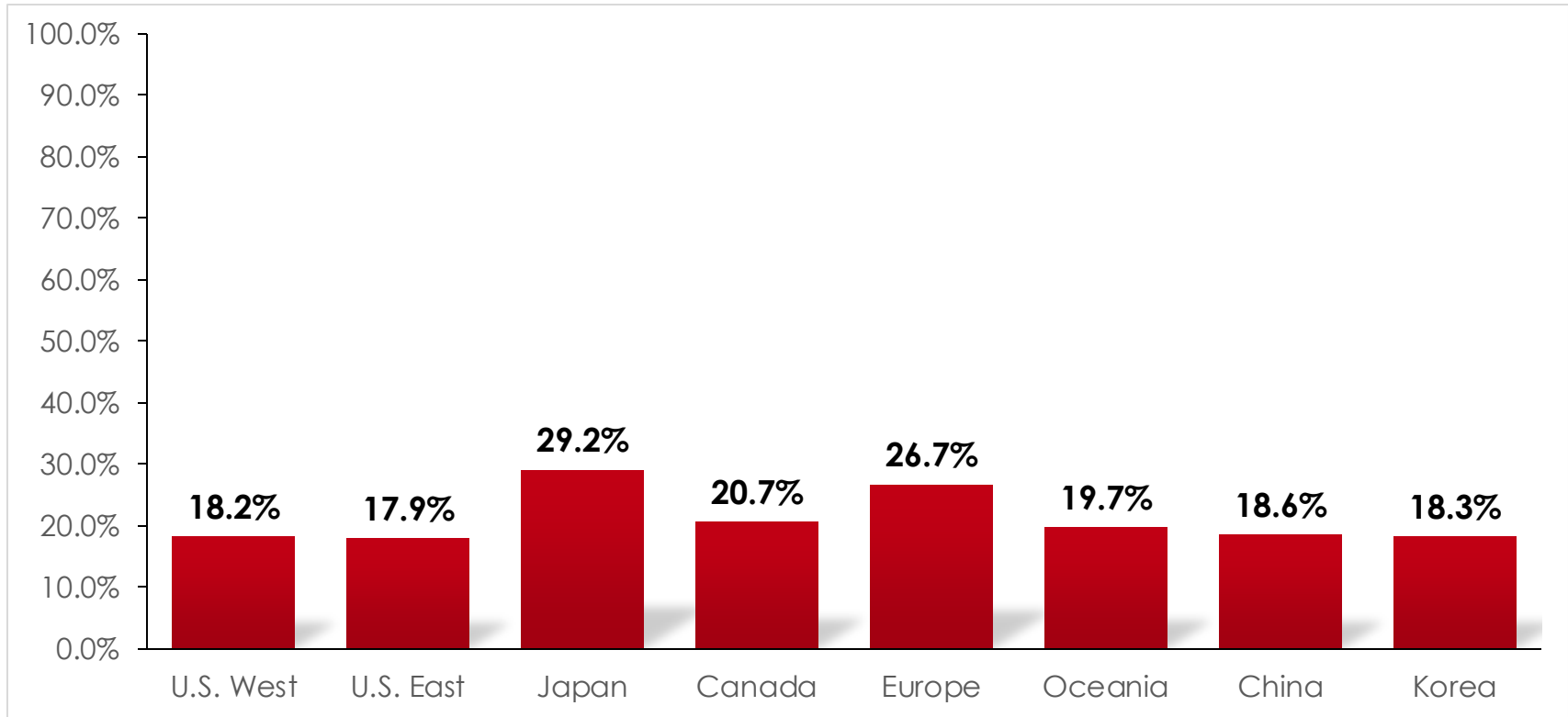
# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I

- Younger visitors to the Island of Hawai'i or those under the age of 35 were least likely to be exposed to marketing for the destination.
- Visitors from Japan, Canada, and China without a college degree were more likely to recall advertising for the Island of Hawai'i than visitors with a college degree from these markets.
- Those who used a travel agent from U.S. East were more likely to be exposed to marketing than those from this market who did not use a travel agent.
- Similar to the U.S., visitors to the Island of Hawai'i from Japan under the age of 35 were also least likely to have been exposed to any marketing for the island.
- Repeat visitors to the Island of Hawai'i from U.S. West, U.S. East, and Japan were more likely to be exposed to marketing for the island than were first-time visitors from these MMAs.

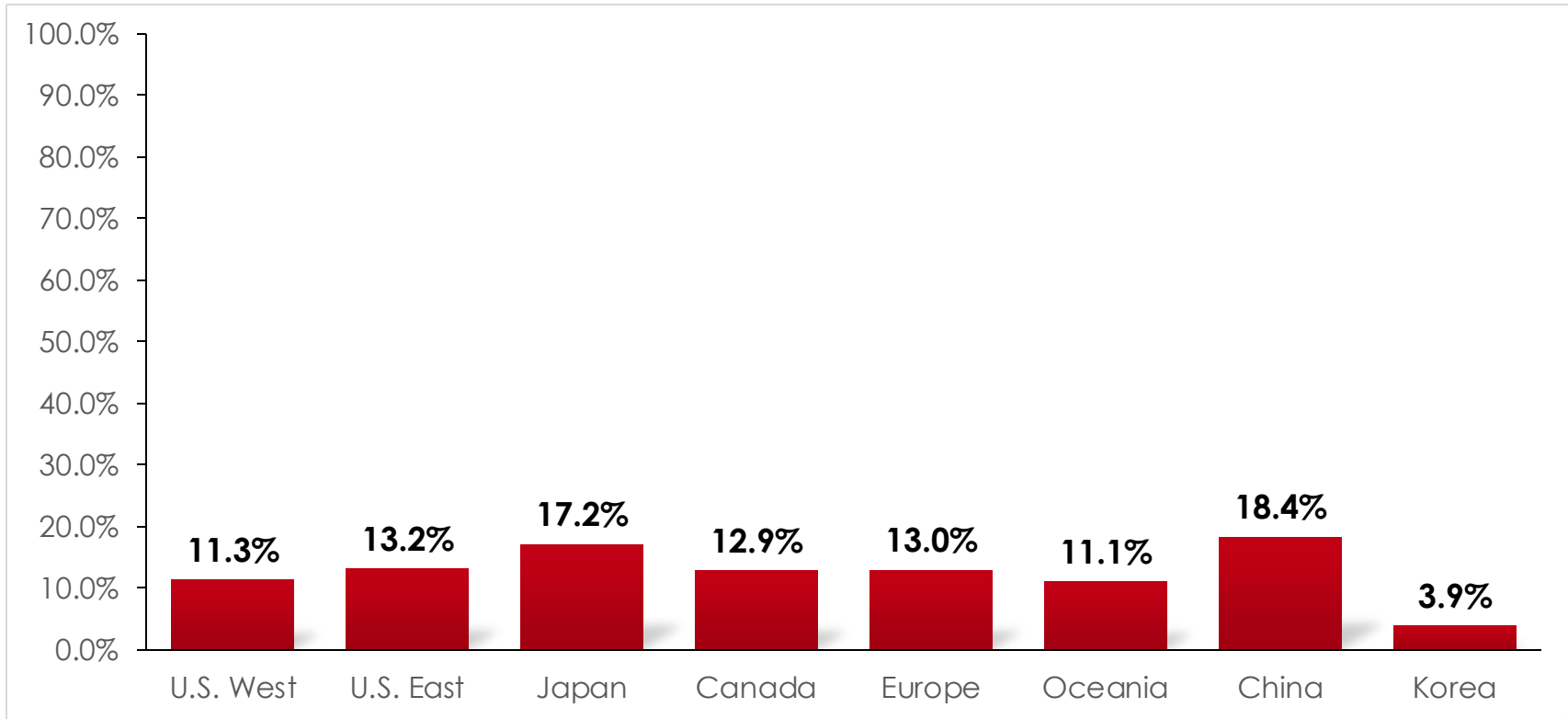
# IMPACT OF LOCATION FILMING— ISLAND OF HAWAI'I



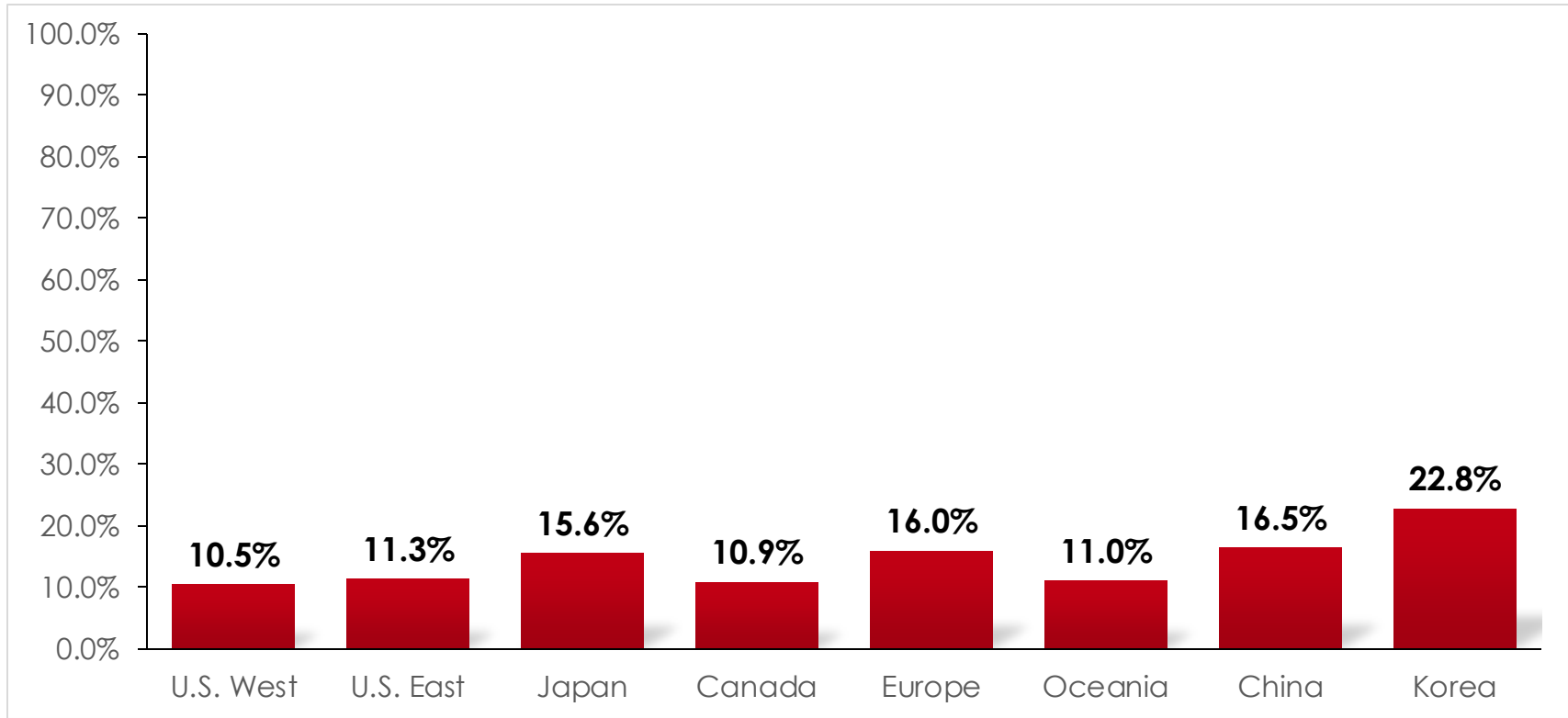
# IMPACT OF OUTDOOR/ SPORTING EVENT – ISLAND OF HAWAI'I



# IMPACT OF HAWAIIAN CULTURAL EVENT – ISLAND OF HAWAI‘I

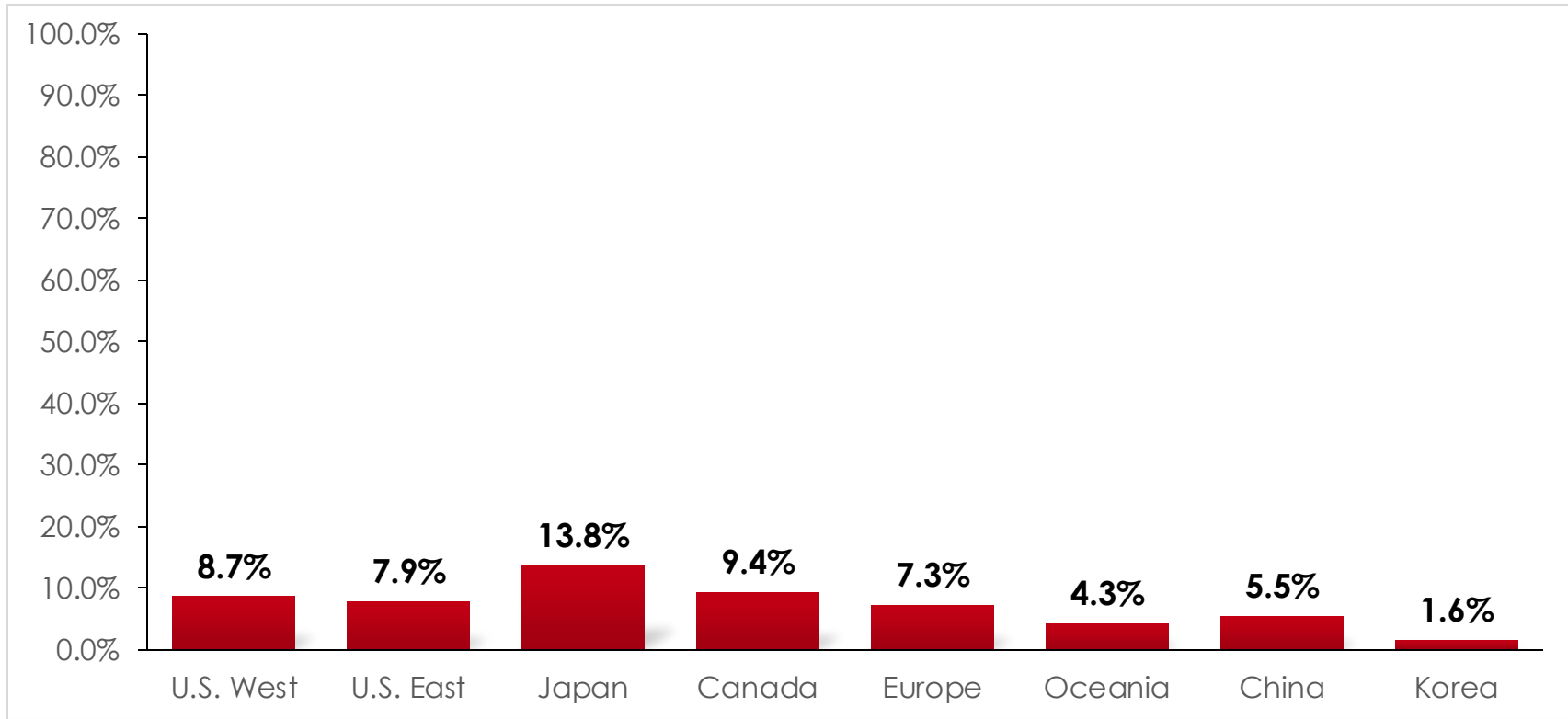


# IMPACT OF SOCIAL MEDIA POST/ VIDEO – ISLAND OF HAWAI‘I

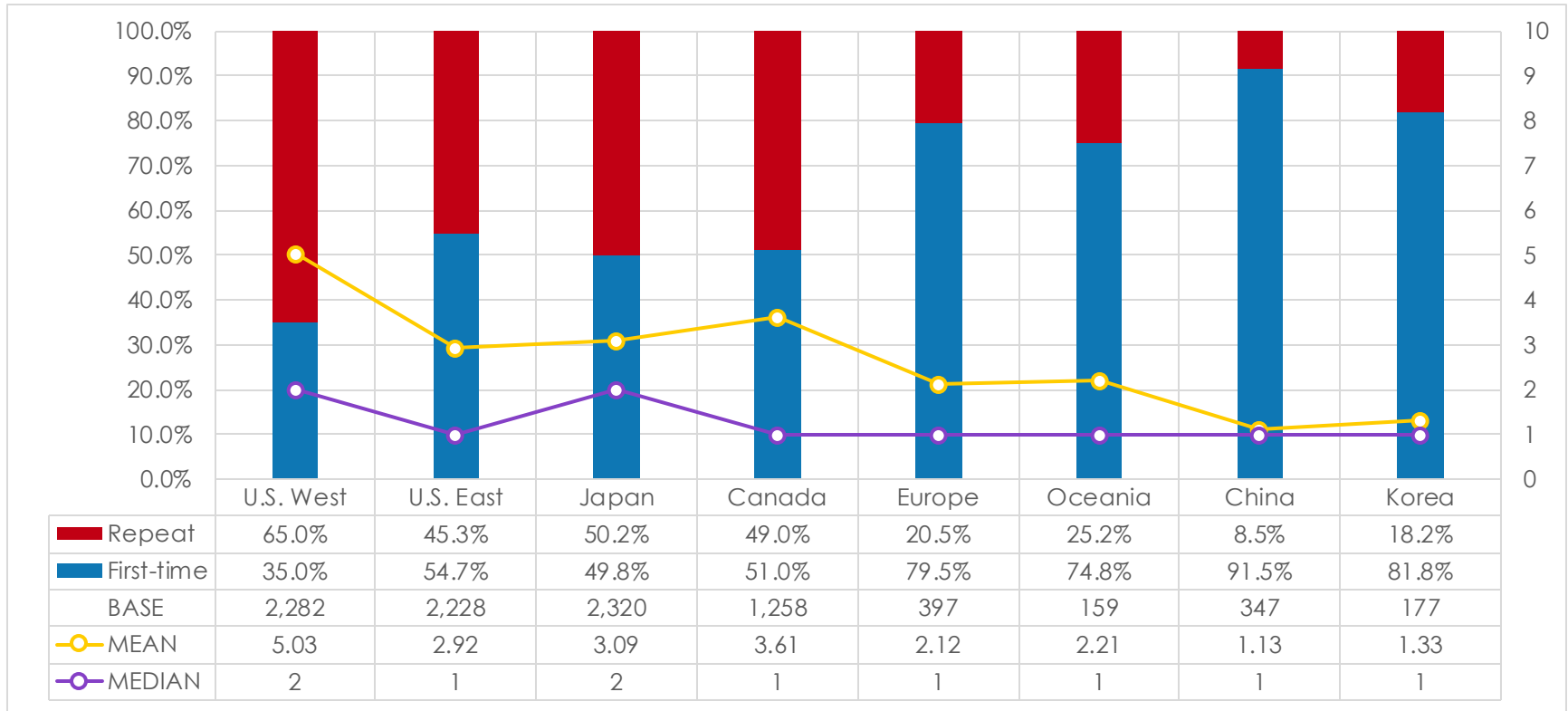




# IMPACT OF HAWAIIAN MUSIC—ISLAND OF HAWAI‘I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – ISLAND OF HAWAI‘I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – ISLAND OF HAWAI'I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

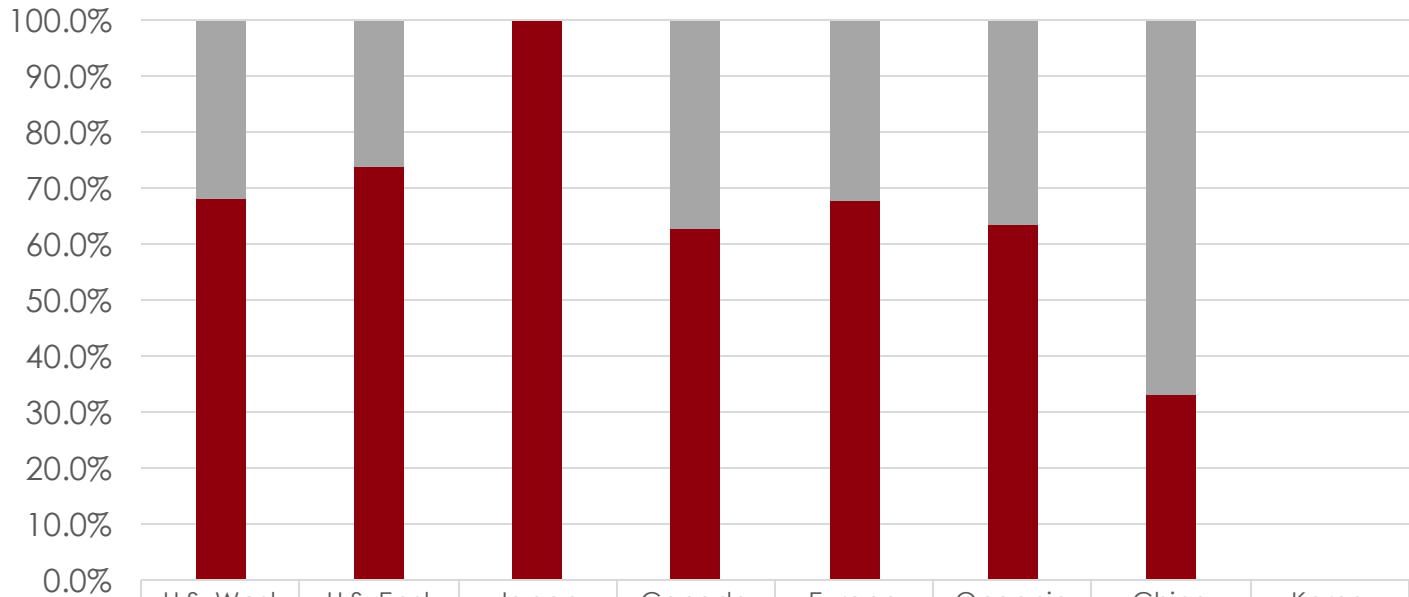
- The mean or average number of visits is higher among males from the following visitor markets: U.S. West, U.S. East, and Japan.
- Those traveling alone to the island of Hawai'i from U.S. West, U.S. East, and Japan are the most frequent visitors compared to visitors from Canada, Europe, Oceania, China, and Korea.
- Females from both U.S. West, and U.S. East were more likely to be first-time visitors to the Island of Hawai'i than were their male counterparts.
- Among U.S. visitors, those in larger travel parties were more likely to be first-time visitors to the Island of Hawai'i.
- When segmented by household income we find more affluent visitors from U.S. West and Canada to the Island of Hawai'i were more likely to be repeat visitors.

# ACCOMMODATIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Hotel</b>	39.6%	42.9%	65.7%	31.4%	53.7%	58.2%	63.1%	75.2%
<b>Vacation rental (includes AirBnB, VRBO, etc.)</b>	23.6%	20.9%	2.7%	36.0%	26.7%	14.0%	11.6%	11.5%
<b>Timeshare Unit</b>	18.4%	18.3%	14.1%	16.4%	3.8%	3.6%	0.9%	0.5%
<b>Condominium</b>	16.2%	11.1%	17.0%	19.3%	8.8%	12.9%	5.4%	0.7%
<b>Friends or Relatives</b>	13.5%	9.9%	1.7%	7.7%	7.2%	4.6%	1.6%	1.7%
<b>Rental House</b>	5.4%	3.6%	1.0%	5.5%	8.5%	2.2%	1.2%	1.7%
<b>Cruise Ship</b>	1.8%	5.5%	0.3%	3.6%	3.1%	13.3%	1.2%	0.0%
<b>Day trip/ Did not stay overnight</b>	1.3%	2.7%	3.1%	0.8%	2.0%	5.4%	14.7%	6.6%
<b>Bed &amp; Breakfast</b>	2.2%	2.9%	0.7%	1.8%	7.0%	2.5%	6.8%	0.7%

# ACCOMMODATIONS - ISLAND OF HAWAI'I

Vacation rental/ Rental house/ Private room/ Shared room



BASE	642	539	3	510	142	27	3	0
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# ACCOMMODATIONS - ISLAND OF HAWAI'I

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	38.7%	38.8%	32.9%	33.8%	45.8%	57.0%	66.7%	0.0%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	22.3%	19.2%	0.0%	27.1%	16.2%	17.1%	0.0%	0.0%
Price	17.0%	20.3%	0.0%	22.6%	25.6%	11.8%	0.0%	0.0%
Ability to have travel party members stay together	16.5%	15.7%	34.2%	10.9%	9.6%	7.5%	33.3%	0.0%
Owned by self, friend or relative	2.8%	3.4%	32.9%	2.6%	1.3%	6.5%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	24.5%	34.6%	43.7%	31.1%	38.1%	29.5%	44.6%	34.9%
Variety of activities/ attractions/ many choices	17.8%	20.7%	21.6%	18.8%	18.2%	21.6%	20.9%	24.5%
Beach/ ocean	16.0%	9.3%	13.3%	14.0%	8.7%	6.9%	9.6%	15.8%
Feeling of the “Aloha Spirit”	10.7%	9.8%	2.7%	12.2%	16.7%	9.1%	3.5%	5.5%
Overall customer service/ hospitality/ the people	6.0%	5.2%	2.9%	4.1%	3.8%	12.0%	2.1%	6.2%
Local culture/ people/ music	5.8%	6.0%	2.3%	4.4%	3.5%	4.5%	3.8%	3.4%
Events/ celebrations with friends/ family	5.2%	4.1%	1.0%	2.4%	2.5%	1.8%	1.5%	0.5%
Accommodations/ was as promised	3.3%	2.5%	4.3%	3.0%	1.5%	3.5%	2.9%	0.5%
Food/ restaurant variety/ dining options	2.3%	1.8%	0.8%	1.3%	0.2%	0.7%	1.7%	3.7%

# STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI‘I

- Among visitors from U.S. West, younger segments or those under 50 were more likely to single out the aloha spirit and the varies food and dining options on island when asked what they particularly liked about their trip.
- Younger visitors under 35 from Japan were more likely to enjoy the local beaches compared to older visitors.
- The island's natural beauty was singled out more often by U.S. West and U.S. East visitors with a college degree while those without a degree were more likely to list the aloha spirit as something they enjoyed during their stay.
- Female visitors from both U.S. West and U.S. East mention enjoying the local culture more often than male visitors from these markets.
- From Japan, female visitors were more likely to enjoy the island's natural beauty while males liked the variety of activities in greater numbers.



# AREAS OF OPPORTUNITIES – ISLAND OF HAWAI‘I

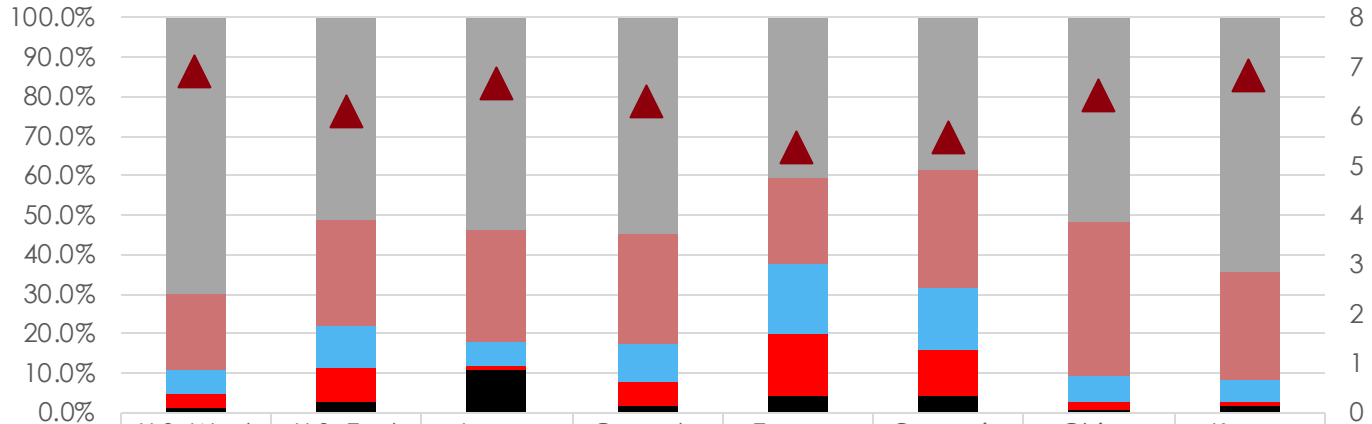
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	47.3%	48.9%	32.2%	44.0%	43.2%	51.5%	44.0%	33.2%
Availability of ground transportation	1.6%	1.9%	24.8%	3.4%	6.2%	2.9%	7.4%	3.5%
Food/ restaurant variety/ dining options	5.6%	6.6%	9.0%	4.8%	5.6%	2.0%	13.0%	7.7%
Would like to experience more local culture	6.0%	7.2%	5.7%	6.9%	9.6%	6.5%	4.0%	11.3%
Traffic	7.3%	5.3%	1.6%	5.6%	3.5%	0.7%	2.0%	3.0%
Driving experience	5.3%	4.6%	2.3%	4.5%	5.3%	3.3%	2.3%	4.5%
Food/ restaurant quality	3.4%	2.4%	7.2%	2.2%	3.7%	2.5%	5.5%	9.0%
Rental car experience	4.3%	4.2%	2.5%	4.2%	2.6%	3.3%	4.0%	1.7%
Cost/Expensive	2.5%	2.7%	1.4%	5.7%	4.4%	3.1%	0.0%	0.5%

# AREAS OF OPPORTUNITIES – ISLAND OF HAWAI‘I

- Younger visitors or those under the age of 35 from U.S. West and U.S. East were most likely to indicate they want to experience more local culture.
- The desire for more exposure to local culture was also something that first-time visitors to the Island of Hawai‘i from U.S. West and U.S. East would like more of.

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAII

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	70.0%	51.1%	54.0%	54.8%	40.3%	38.6%	51.6%	64.1%
■ Somewhat likely (5-6)	19.2%	27.2%	28.1%	27.8%	21.8%	30.0%	38.9%	27.5%
■ Somewhat unlikely (3-4)	6.0%	10.3%	6.2%	9.4%	17.8%	15.4%	6.6%	5.5%
■ Very unlikely (1-2)	3.6%	8.5%	1.1%	6.2%	15.6%	12.0%	2.3%	1.1%
■ Not sure	1.2%	2.9%	10.6%	1.8%	4.4%	4.0%	0.6%	1.7%
BASE	2,263	2,198	2,316	1,245	390	158	343	177
▲ MEAN	6.91	6.12	6.69	6.33	5.39	5.57	6.44	6.86

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

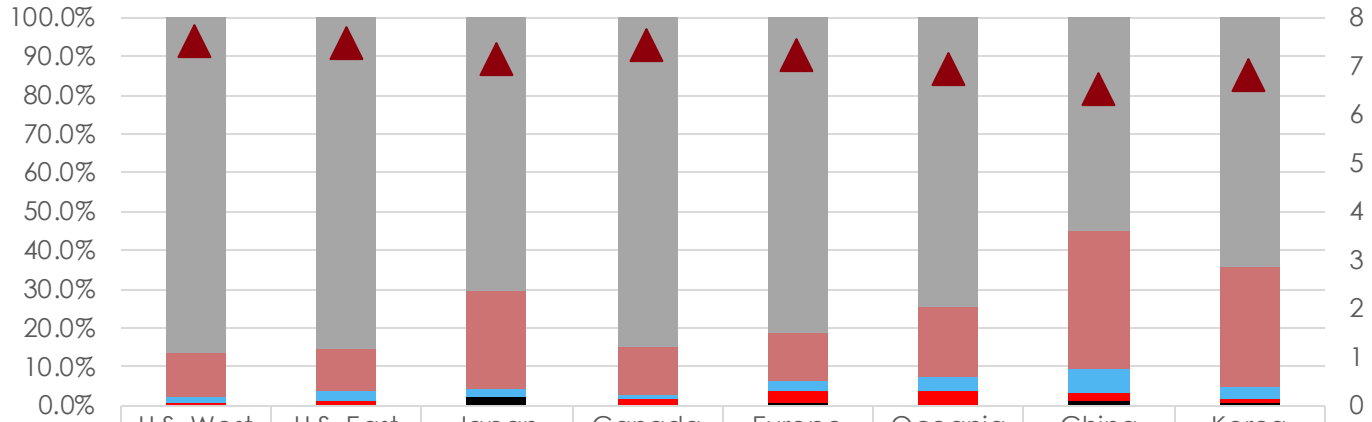
- Among Japanese visitors the likelihood of return increases with age. Japanese visitors under the age of 35 were the least likely to indicate a return to Hawai‘i island in the next five years.
- At the opposite end, seniors from U.S. East appeared the least likely to return to the island compared to younger visitors from this market.
- Those from U.S. West and U.S. East who traveled alone were the most likely to return to Hawai‘i Island within the next five years compared to those who came in larger travel parties.

# REASONS FOR NOT RETURNING – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	57.8%	52.8%	42.6%	55.5%	38.5%	47.9%	62.0%	20.8%
Too expensive/cost	19.2%	32.1%	20.0%	31.7%	39.9%	15.1%	9.2%	48.0%
Flight too long	4.9%	30.4%	10.3%	24.0%	55.9%	4.0%	22.1%	19.5%
No reason to return/ nothing new	14.3%	12.4%	14.1%	12.9%	13.7%	23.6%	15.9%	6.5%
Other financial obligations	9.4%	8.4%	17.8%	9.5%	14.0%	16.2%	0.0%	26.0%
Not enough value for the price	6.5%	8.1%	5.1%	10.6%	10.2%	5.8%	18.4%	33.8%
Poor health/ age restriction	4.1%	6.2%	7.3%	2.8%	4.1%	4.0%	0.0%	0.0%
Nothing to do/ boring	3.7%	3.1%	7.3%	3.1%	2.0%	5.8%	12.9%	0.0%
Too crowded/ congested/ traffic	2.0%	1.9%	2.4%	1.9%	1.4%	0.0%	0.0%	20.8%
Inconvenient travel connections	1.6%	2.1%	2.4%	3.1%	0.7%	2.3%	6.7%	0.0%
Unfriendly people/ felt unwelcome	2.8%	2.5%	0.5%	1.3%	2.0%	1.8%	0.0%	7.8%
Beaches/ ocean- not as nice	4.1%	0.4%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%

# ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	86.3%	85.4%	70.5%	84.8%	81.2%	74.8%	55.0%	64.4%
■ Somewhat likely (5-6)	11.4%	10.9%	24.9%	12.4%	12.5%	17.7%	35.6%	30.5%
■ Somewhat unlikely (3-4)	1.4%	2.3%	2.2%	1.3%	2.6%	3.8%	6.1%	3.3%
■ Very unlikely (1-2)	0.8%	1.3%	0.3%	1.3%	3.1%	3.7%	2.3%	1.2%
■ Not sure	0.0%	0.1%	2.0%	0.2%	0.5%	0.0%	1.1%	0.5%
BASE	2,243	2,182	2,311	1,238	386	157	342	177
▲ MEAN	7.51	7.44	7.11	7.42	7.22	6.92	6.52	6.81

# ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among Japanese visitors, seniors or those over 65 were least likely to recommend the Island of Hawai'i compared to younger travelers from this visitor market.
- Female travelers from U.S. West were more enthusiastic about recommended the Island of Hawai'i than were males.
- Travelers from U.S. West and U.S. East whose stay was exclusively on the island of Hawai'i were more likely to recommend the Island of Hawai'i than travelers from these markets who visited another island during their trip.

# ISLAND OF HAWAI'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.4%	97.1%	96.8%	97.1%	95.7%	94.9%	97.5%	93.4%
<b>On own (self-guided)</b>	86.4%	85.4%	66.1%	87.9%	80.5%	59.8%	53.7%	68.8%
<b>Helicopter/ airplane</b>	5.6%	10.0%	3.2%	6.4%	12.5%	21.1%	53.8%	7.0%
<b>Boat/ submarine/ whale</b>	19.9%	25.1%	6.9%	22.2%	23.5%	21.3%	14.8%	15.4%
<b>Visit towns</b>	56.1%	55.8%	31.0%	60.1%	43.5%	39.2%	26.4%	37.1%
<b>Limo/ van/ bus tour</b>	5.8%	13.3%	31.1%	7.7%	11.8%	24.1%	19.0%	12.4%
<b>Scenic views/ natural landmark</b>	60.5%	69.1%	27.3%	67.4%	67.0%	50.1%	13.0%	52.5%
<b>Movie/ TV/ film location</b>	0.9%	1.1%	1.3%	1.9%	1.3%	4.6%	71.7%	12.9%



# ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.7%	95.8%	96.2%	97.8%	96.6%	95.1%	94.3%	98.9%
<b>Beach/ sunbathing</b>	80.8%	76.7%	64.0%	85.3%	77.3%	62.4%	66.1%	67.2%
<b>Bodyboard/ Standup paddle board</b>	12.8%	9.7%	4.1%	18.2%	12.0%	7.8%	2.0%	9.4%
<b>Surfing</b>	3.1%	3.8%	0.9%	5.2%	6.5%	3.1%	6.0%	16.1%
<b>Canoeing/ kayak</b>	8.6%	6.8%	3.7%	8.5%	6.0%	5.7%	2.4%	6.7%
<b>Swim- ocean</b>	64.8%	62.4%	30.5%	75.1%	71.3%	56.5%	31.8%	44.3%
<b>Snorkel</b>	53.2%	47.9%	23.7%	60.2%	52.3%	38.0%	23.9%	46.4%
<b>Windsurf/ Kitesurf</b>	0.1%	0.1%	0.1%	0.2%	0.5%	0.0%	1.5%	1.9%
<b>Jet ski/ Parasail</b>	1.0%	1.4%	0.5%	0.6%	1.0%	0.6%	0.0%	3.8%
<b>Scuba</b>	3.9%	3.7%	1.0%	4.2%	4.4%	1.1%	2.8%	3.3%
<b>Fishing</b>	5.0%	4.4%	1.1%	2.9%	1.3%	1.4%	2.2%	4.0%
<b>Golf</b>	8.1%	6.5%	14.6%	9.3%	2.8%	3.3%	3.2%	5.9%

# ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.7%	95.8%	96.2%	97.8%	96.6%	95.1%	94.3%	98.9%
<b>Run/ Jog/ Fitness walk</b>	24.4%	20.8%	12.2%	26.5%	18.6%	18.0%	11.0%	9.0%
<b>Spa</b>	7.4%	7.3%	6.6%	4.9%	4.9%	5.1%	3.3%	6.2%
<b>Hiking</b>	47.7%	55.2%	13.5%	56.7%	55.9%	28.8%	37.1%	21.8%
<b>Backpack/Camp</b>	1.6%	2.7%	0.1%	2.0%	4.2%	1.3%	2.7%	3.0%
<b>Agritourism</b>	17.2%	19.8%	21.7%	17.0%	8.8%	5.5%	13.3%	28.1%
<b>Sport event/ tournament</b>	2.7%	3.2%	1.6%	3.6%	5.4%	4.4%	0.0%	2.8%
<b>Park/ botanical garden</b>	40.5%	47.1%	22.1%	47.3%	46.8%	46.0%	33.6%	31.0%
<b>Waterpark</b>	0.8%	0.9%	2.8%	1.2%	1.3%	2.9%	4.1%	6.2%
<b>Mountain tube/ waterfall rappel</b>	1.2%	0.7%	1.1%	0.8%	3.2%	1.1%	0.6%	2.2%
<b>Zip-lining</b>	5.4%	5.9%	1.2%	3.0%	2.1%	2.6%	1.2%	1.2%
<b>Skydiving</b>	0.4%	0.4%	0.1%	0.1%	0.5%	0.0%	4.3%	4.5%
<b>All terrain vehicle (ATV)</b>	2.1%	2.7%	0.3%	1.5%	3.4%	3.3%	7.4%	6.6%
<b>Horseback riding</b>	2.5%	2.4%	5.5%	2.5%	2.0%	0.0%	1.2%	0.0%

# ISLAND OF HAWAI'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	97.9%	97.4%	96.9%	98.4%	96.4%	94.7%	96.1%	97.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	16.3%	18.7%	6.1%	19.2%	24.9%	17.0%	54.3%	32.5%
<b>Live music/ stage show</b>	26.4%	29.3%	18.7%	28.9%	23.0%	14.5%	11.6%	14.8%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.8%	7.7%	2.6%	5.3%	6.0%	7.3%	6.2%	1.1%
<b>Fine dining</b>	49.3%	45.9%	34.8%	39.7%	29.8%	26.1%	34.5%	35.5%
<b>Family restaurant</b>	63.6%	60.0%	26.1%	60.2%	49.1%	50.5%	18.7%	33.4%
<b>Fast food</b>	30.5%	32.5%	46.6%	42.0%	42.7%	33.2%	44.9%	53.7%
<b>Food truck</b>	15.2%	16.7%	5.9%	16.9%	21.3%	12.9%	14.7%	34.9%
<b>Café/ coffee house</b>	48.7%	46.3%	51.5%	56.0%	53.8%	65.1%	28.5%	48.9%
<b>Ethnic dining</b>	32.4%	31.6%	7.8%	23.3%	15.0%	15.7%	16.3%	23.2%
<b>Prepared own meal</b>	57.3%	46.8%	30.7%	72.5%	52.4%	30.9%	18.9%	23.8%

# ISLAND OF HAWAI'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.8%	95.1%	97.7%	97.1%	95.2%	93.6%	94.4%	96.5%
<b>Mall/ department store</b>	31.3%	29.5%	59.5%	47.4%	44.0%	44.2%	50.8%	68.4%
<b>Designer boutique</b>	13.1%	14.4%	4.6%	13.7%	8.8%	14.5%	6.8%	2.2%
<b>Hotel/ resort store</b>	30.6%	32.4%	32.8%	27.1%	22.1%	28.3%	20.4%	18.8%
<b>Swap meet/ flea market</b>	15.5%	12.0%	3.1%	12.0%	4.9%	10.6%	4.4%	3.3%
<b>Discount/ outlet store</b>	11.9%	12.2%	8.0%	12.7%	12.7%	22.1%	30.4%	51.3%
<b>Supermarket</b>	69.4%	63.0%	77.9%	75.4%	74.4%	53.4%	59.6%	52.2%
<b>Farmer's market</b>	51.9%	42.5%	25.3%	58.1%	41.3%	32.0%	15.1%	16.1%
<b>Convenience store</b>	41.8%	41.4%	24.9%	42.3%	29.4%	48.2%	37.4%	43.7%
<b>Duty free store</b>	2.0%	2.2%	4.4%	3.5%	4.9%	3.1%	39.7%	40.5%
<b>Local shop/ artisan</b>	64.9%	66.3%	15.2%	66.2%	54.0%	58.3%	24.0%	16.9%

# ISLAND OF HAWAI'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	69.0%	70.8%	60.5%	71.1%	65.5%	66.5%	79.1%	73.7%
<b>Historic military site</b>	6.8%	12.1%	14.0%	8.6%	15.4%	22.0%	37.7%	16.0%
<b>Other historical site</b>	36.0%	40.5%	29.3%	39.3%	38.6%	33.8%	31.9%	36.2%
<b>Museum/ art gallery</b>	18.9%	16.1%	3.3%	17.3%	16.1%	19.0%	17.9%	7.3%
<b>Luau/ Polynesian show/ hula show</b>	23.8%	29.9%	13.3%	28.2%	21.1%	24.1%	13.5%	27.2%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	5.5%	6.1%	7.2%	5.9%	6.8%	8.2%	9.9%	4.6%
<b>Play/ concert/ theatre</b>	3.6%	3.2%	2.0%	3.2%	2.3%	2.2%	1.5%	8.3%
<b>Art/ craft fair</b>	16.5%	13.4%	2.2%	14.3%	6.7%	9.0%	13.4%	3.4%
<b>Festival event</b>	5.5%	6.5%	2.8%	5.3%	5.2%	4.0%	2.3%	1.1%

# ISLAND OF HAWAI'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.9%	93.9%	97.9%	94.5%	94.2%	93.4%	90.9%	94.7%
<b>Airport shuttle</b>	11.5%	14.4%	20.8%	16.2%	19.8%	25.2%	14.0%	17.4%
<b>Trolley</b>	2.5%	2.0%	16.0%	3.6%	3.9%	15.2%	3.5%	17.2%
<b>Public bus</b>	0.6%	1.5%	2.4%	2.7%	9.1%	13.7%	14.0%	7.1%
<b>Tour bus/ tour van</b>	6.1%	14.2%	36.7%	7.0%	11.1%	27.8%	19.7%	32.2%
<b>Taxi/ limo</b>	4.2%	6.3%	18.4%	9.0%	14.8%	22.9%	17.5%	24.6%
<b>Rental car</b>	84.6%	81.5%	51.7%	86.2%	77.0%	51.9%	55.8%	49.0%
<b>Ride share</b>	8.3%	10.1%	3.6%	8.1%	12.3%	12.4%	14.6%	7.2%
<b>Bicycle rental</b>	1.6%	1.4%	0.7%	2.3%	2.8%	0.0%	2.3%	1.8%

## ISLAND OF HAWAI'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	30.5%	21.0%	9.8%	19.3%	12.7%	10.5%	13.7%	26.3%
Visit friends/ family	29.9%	20.2%	9.4%	18.2%	10.6%	9.8%	11.4%	24.3%
Volunteer- non-profit	1.2%	1.3%	0.4%	1.3%	2.3%	1.3%	3.0%	2.0%

# ATTRACTIONS – ISLAND OF HAWAI‘I

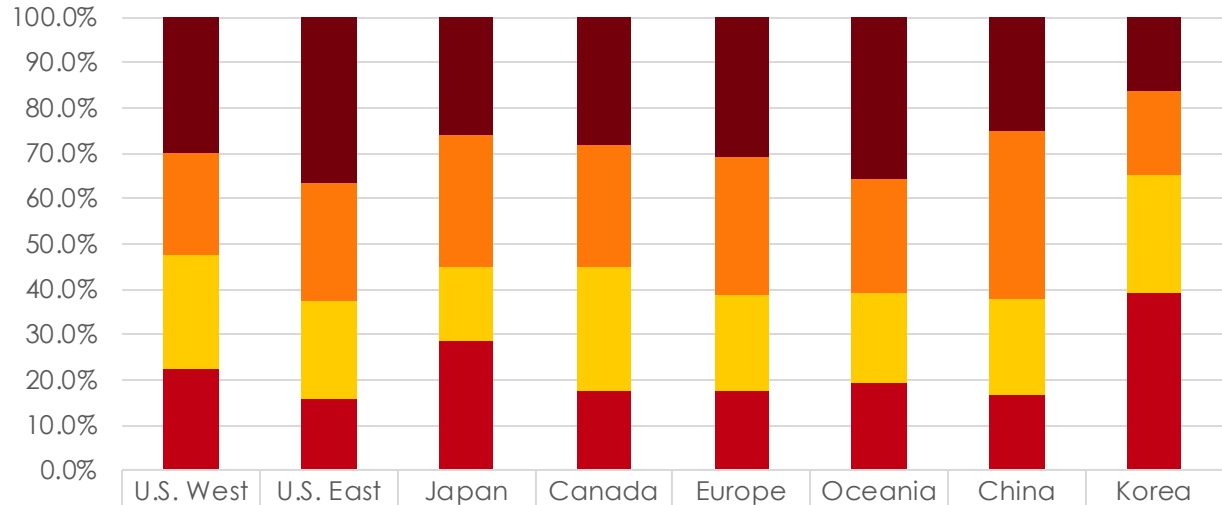
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>‘Akaka Falls</b>	28.8%	35.8%	23.5%	36.6%	43.8%	27.7%	29.7%	31.8%
<b>Botanical Gardens</b>	20.1%	19.4%	3.4%	22.8%	29.3%	16.8%	20.9%	9.7%
<b>H.N. Greenwell Store</b>	3.1%	4.2%	1.1%	5.1%	1.5%	1.8%	2.4%	3.4%
<b>Hawaii Volcanoes National Park</b>	48.2%	63.6%	53.1%	60.4%	74.8%	67.4%	75.0%	49.1%
<b>Hilo Farmers Market</b>	25.8%	23.7%	15.6%	26.1%	24.1%	18.3%	17.0%	15.3%
<b>Hulihe‘e Palace</b>	7.2%	6.5%	7.9%	6.8%	7.5%	9.5%	4.8%	6.1%
<b>‘Imiloa Astronomy Ctr</b>	1.9%	2.6%	2.3%	3.2%	2.9%	3.8%	11.9%	6.8%
<b>Kaloko-Honokohau National Historical Park</b>	10.2%	12.4%	2.4%	14.4%	12.3%	6.0%	13.8%	3.0%
<b>Kona Coffee Living History Farm</b>	14.5%	20.8%	26.8%	17.8%	18.4%	23.4%	19.1%	41.7%
<b>Lili‘uokalani Park and Garden</b>	7.8%	10.8%	3.0%	8.2%	8.7%	6.4%	2.0%	11.3%



## ATTRACTIONS – ISLAND OF HAWAI‘I (cont.)

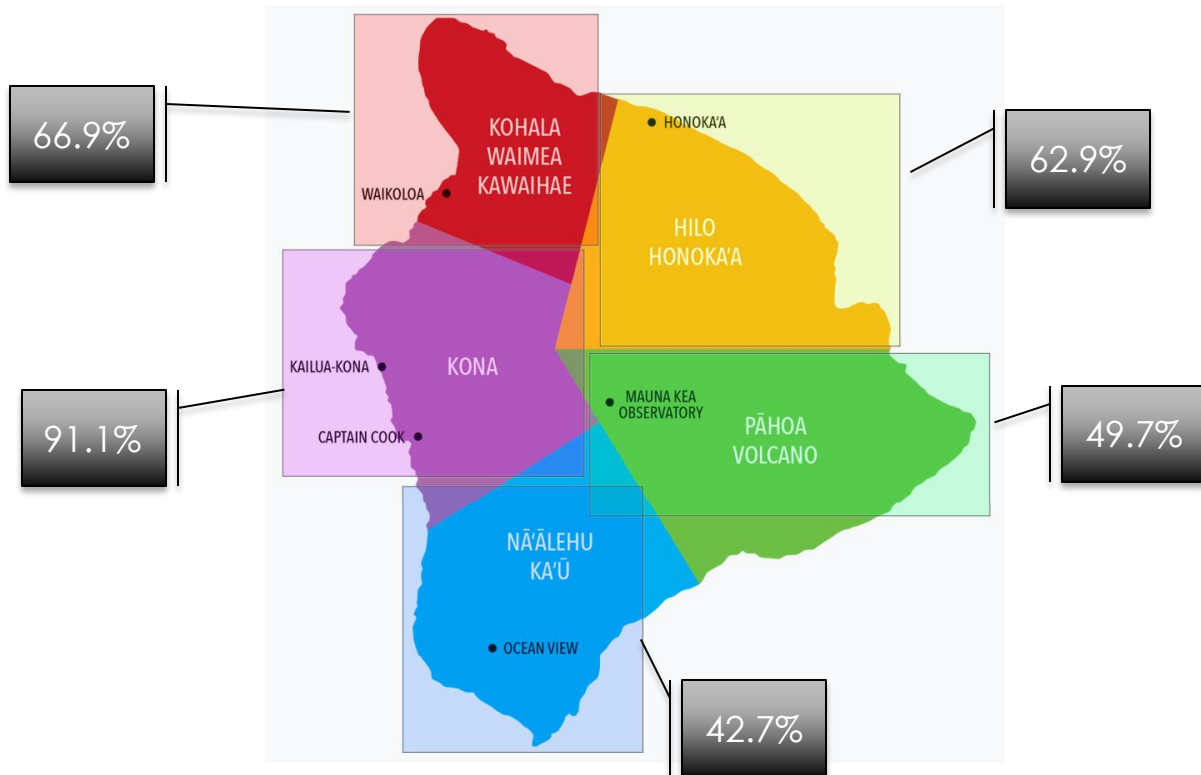
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Lyman House Memorial Museum</b>	2.5%	1.2%	0.4%	1.4%	0.8%	2.4%	2.3%	1.6%
<b>Maunakea</b>	13.9%	19.5%	44.0%	21.0%	26.9%	13.9%	38.2%	28.4%
<b>Orchid Farm</b>	3.7%	4.2%	0.5%	4.1%	4.6%	5.8%	16.1%	5.7%
<b>Pacific Tsunami Museum</b>	3.8%	2.8%	1.3%	3.3%	3.2%	5.7%	3.0%	1.9%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	5.3%	4.2%	0.8%	5.8%	3.6%	3.3%	3.0%	2.2%
<b>Pu'uhonua o Honaunau National Historical Park</b>	21.7%	23.8%	5.2%	27.3%	27.2%	9.0%	5.5%	10.5%
<b>Pu'ukohola Heia National Historical Site</b>	10.3%	12.6%	2.9%	13.8%	11.9%	6.2%	3.9%	1.6%
<b>Punalu'u Black Sand Beach</b>	32.7%	43.2%	20.9%	44.2%	43.6%	31.9%	50.4%	15.6%
<b>Rainbow Falls</b>	28.8%	38.1%	18.9%	31.6%	40.5%	37.6%	42.5%	18.5%
<b>Volcano Art Center</b>	10.3%	11.9%	11.9%	10.4%	15.5%	15.9%	9.1%	11.6%

# TRAVEL ON ISLAND OF HAWAI'I



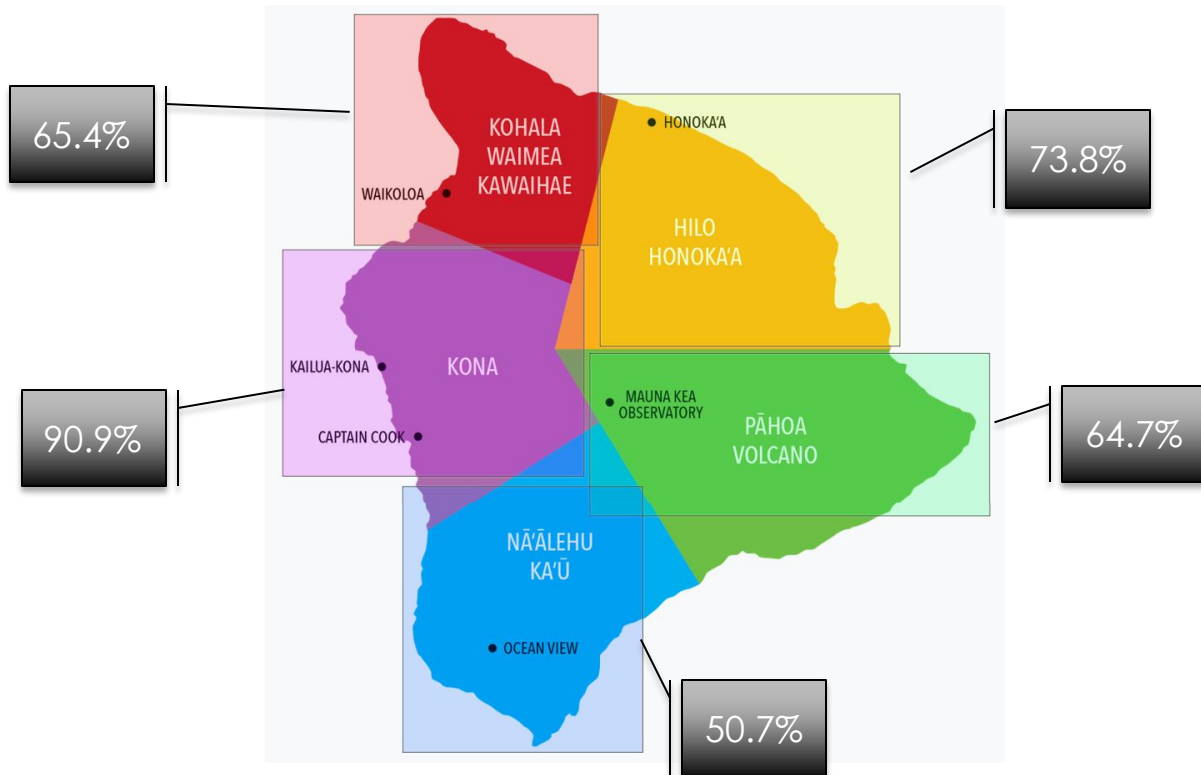
■ Traveled to other side of island	30.0%	36.4%	25.9%	28.1%	31.0%	35.7%	25.1%	16.2%
■ Traveled more than 1 hour	22.3%	26.2%	29.5%	26.8%	30.1%	25.4%	37.1%	18.6%
■ Traveled 1 hour or less one way to reach activity	25.1%	21.6%	16.0%	27.7%	21.4%	19.7%	21.3%	26.1%
■ Enjoy activities- short drive from accommodations	22.5%	15.7%	28.7%	17.4%	17.5%	19.3%	16.5%	39.1%
● BASE	2,174	2,134	2,306	1,210	375	152	333	174

# AREAS VISITED U.S. WEST



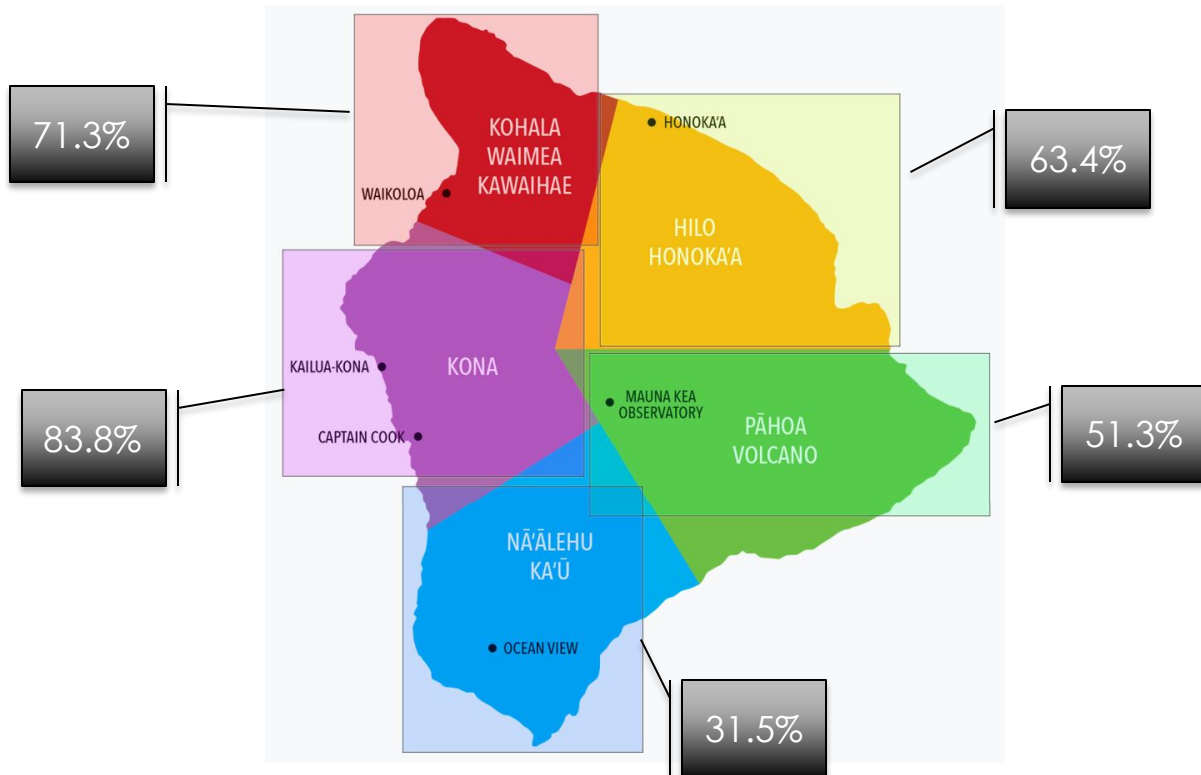
507 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# AREAS VISITED U.S. EAST



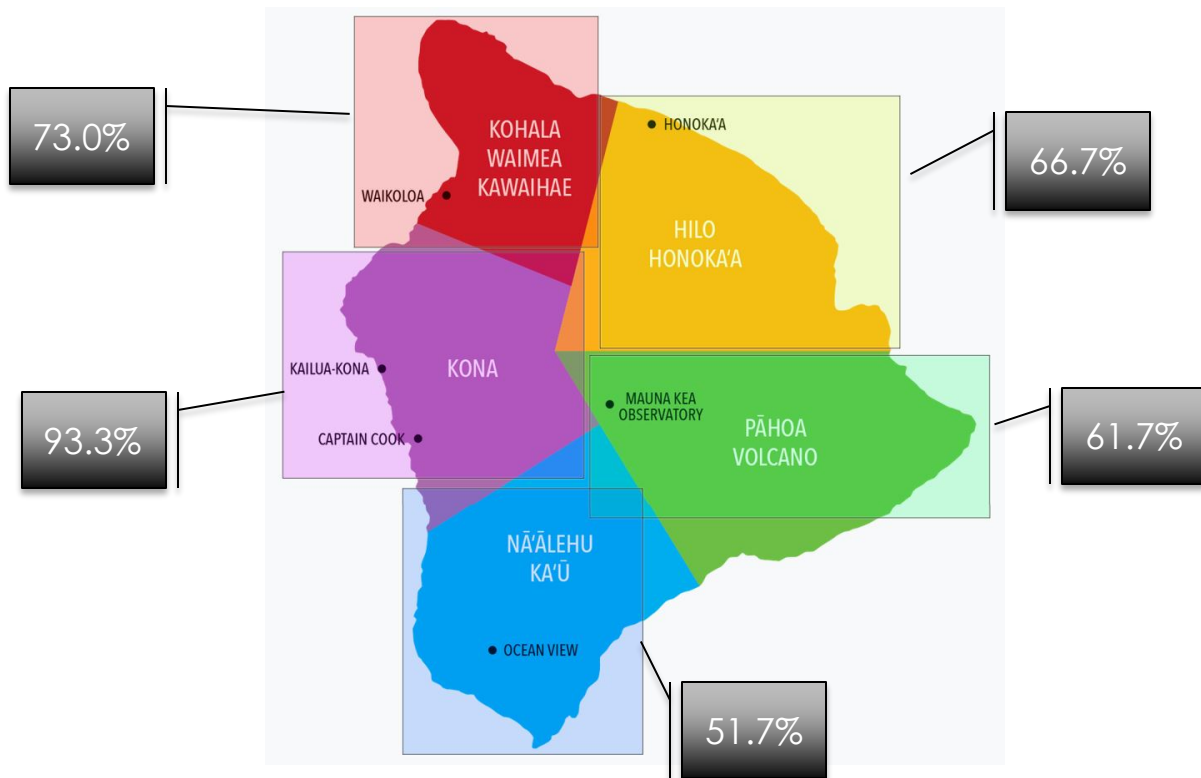
508 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# AREAS VISITED JAPAN



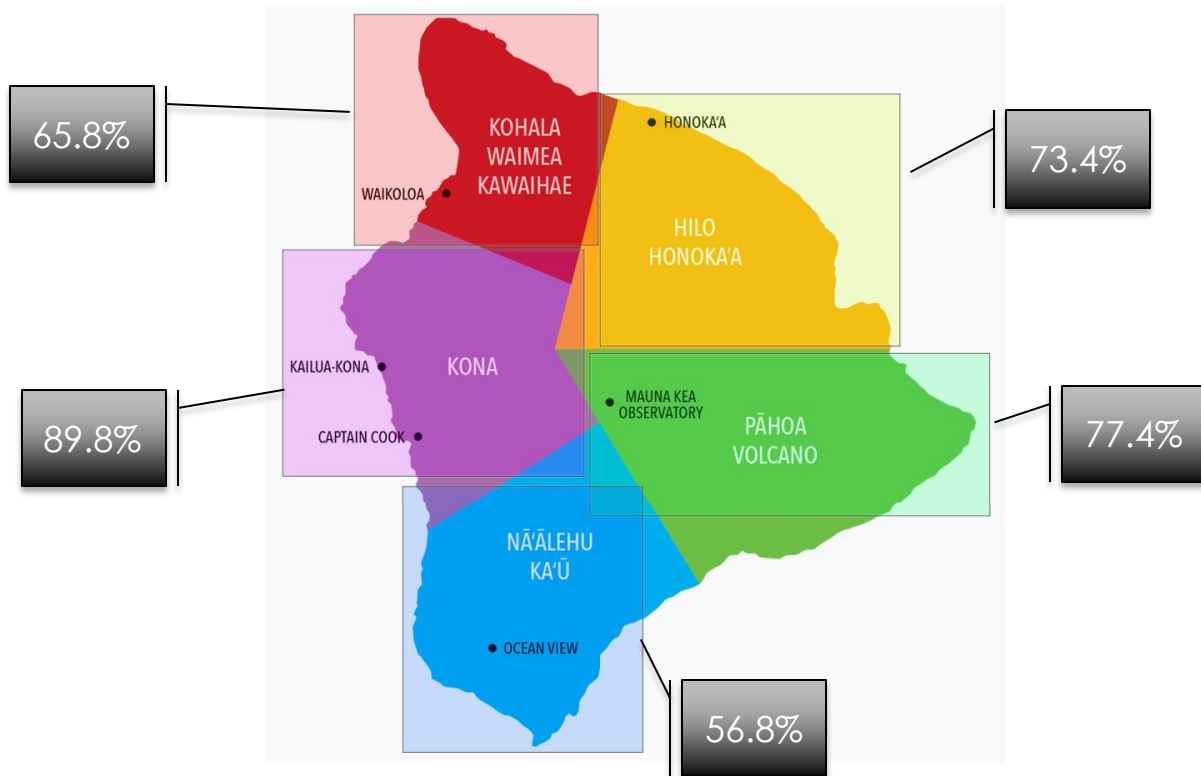
509 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# AREAS VISITED CANADA



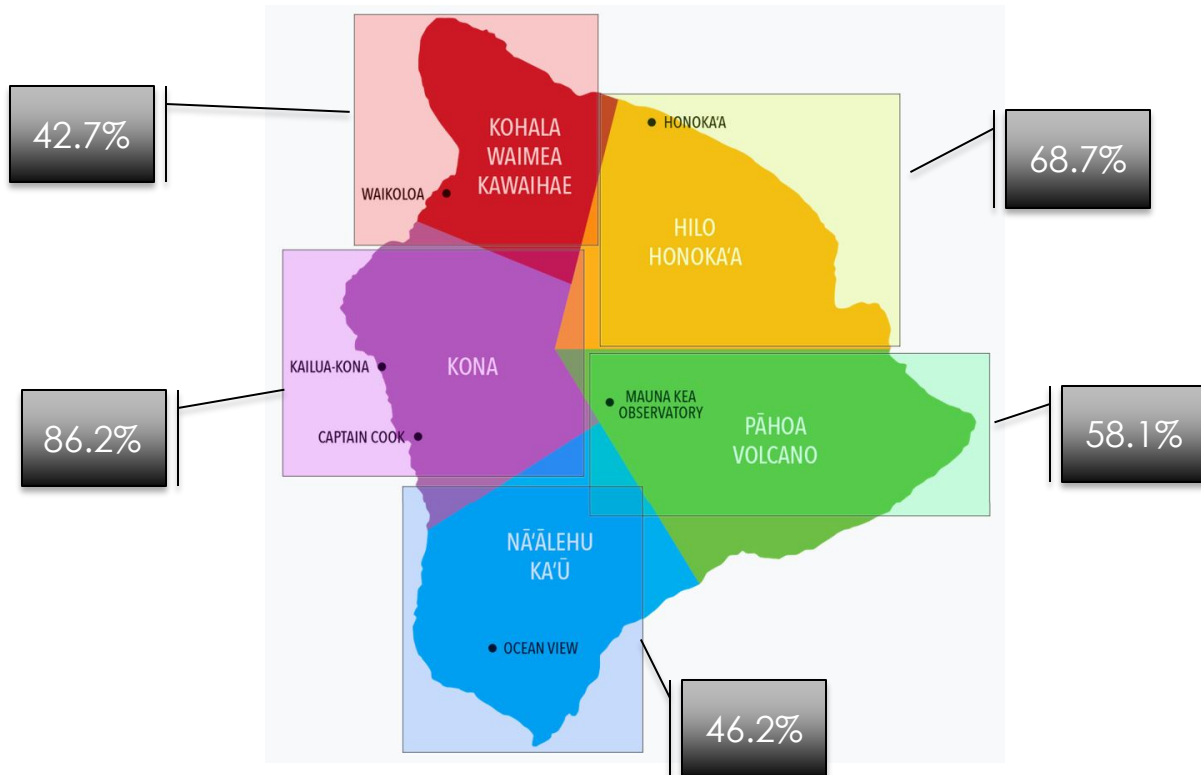
510 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# AREAS VISITED EUROPE



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

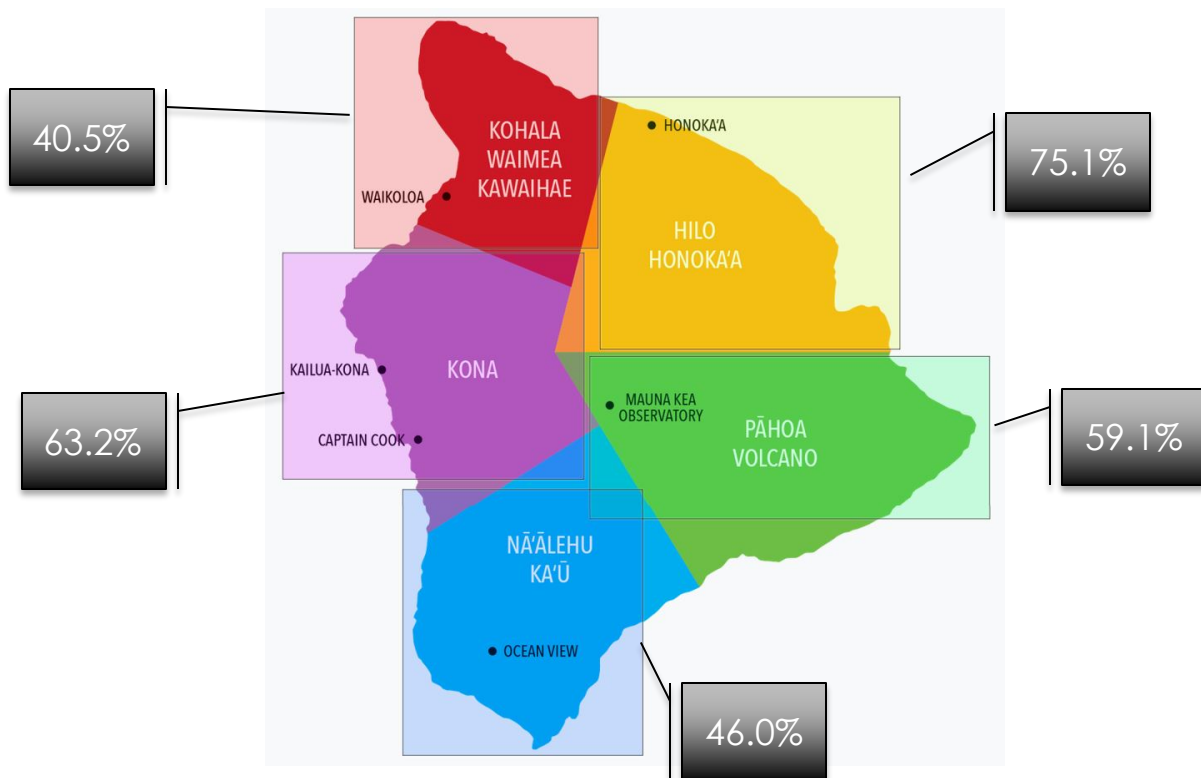
# AREAS VISITED OCEANIA



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

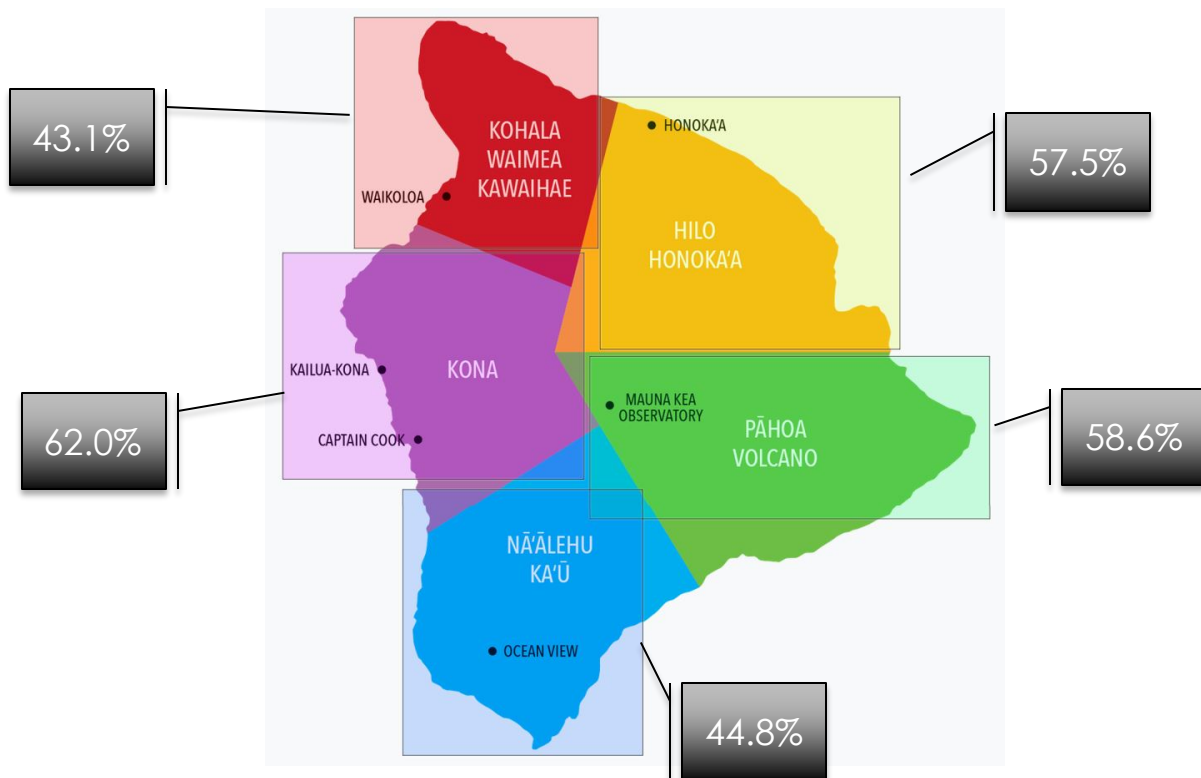


# AREAS VISITED CHINA



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

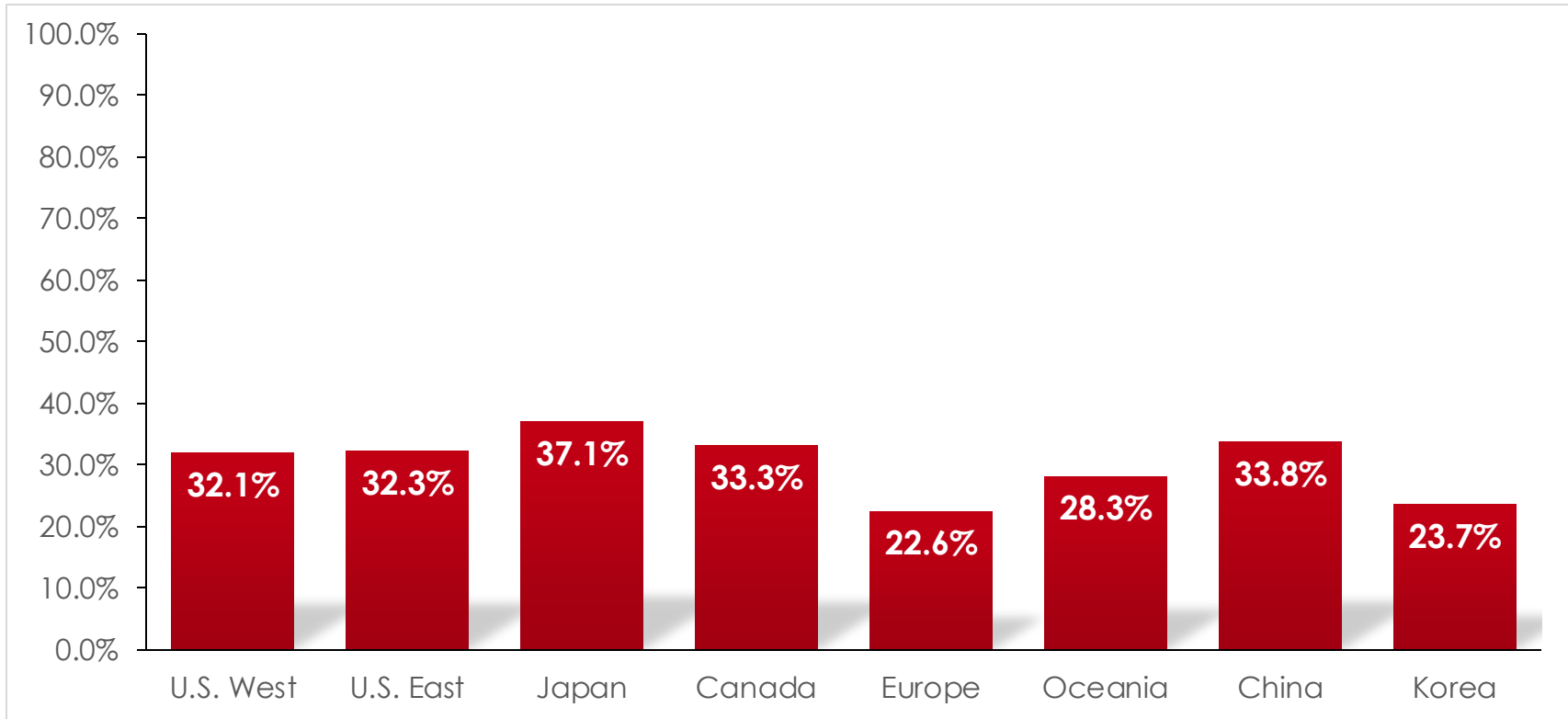
# AREAS VISITED KOREA



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

# SECTION – MAUI

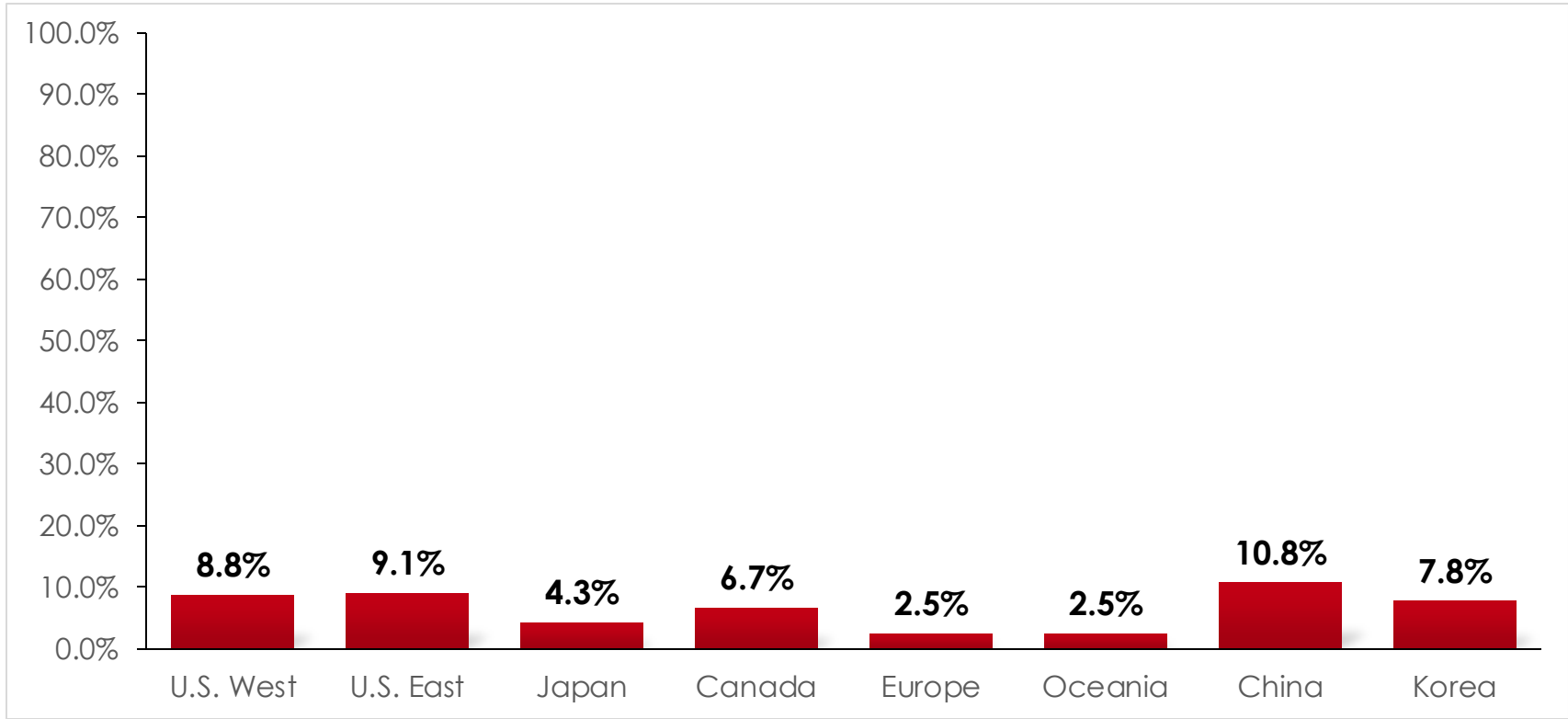
# AIDED ADVERTISING AWARENESS – MAUI



# AIDED ADVERTISING AWARENESS – MAUI

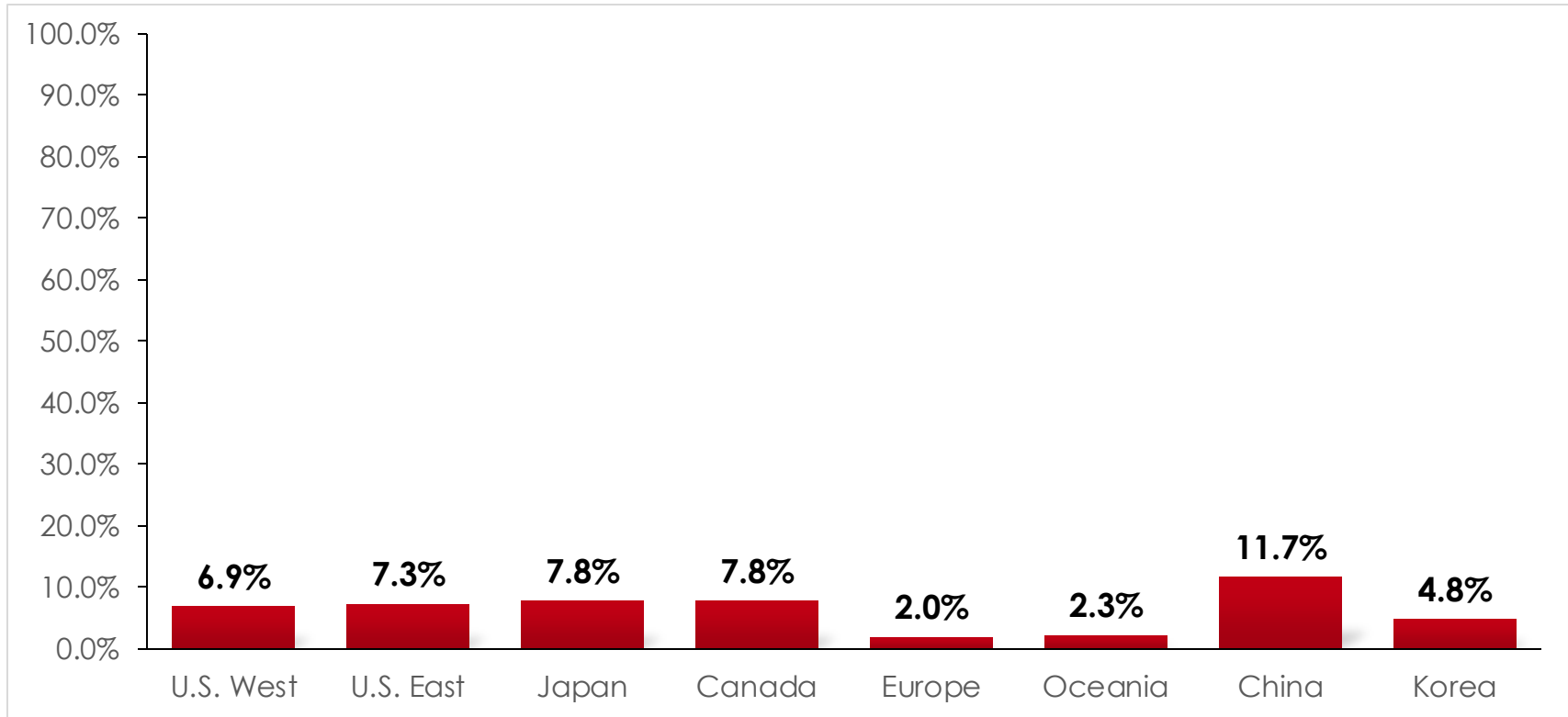
- Among U.S. visitors, aided advertising awareness for Maui increased with age with younger visitors the least likely to have been exposed to marketing for the island. Similarly, among Japanese and Canadian visitors, aided advertising awareness for Maui was highest among seniors.
- Visitors without a college degree from the U.S. East, Japan, Canada, and Oceania were more likely to be exposed to marketing for Maui than more educated visitors from these markets.
- Visitors from U.S. West and U.S. East who visited multiple Hawaiian Islands during their trip were more likely to have been exposed to marketing for Maui than those who visited just Maui on their most recent trip.
- Visitors from U.S. East who used a travel agent were more likely to recall marketing for Maui than visitors from this market who did not use a travel agent.

# AIDED ADVERTISING AWARENESS – MAUI JIM MAUI INVITATIONAL



518 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?

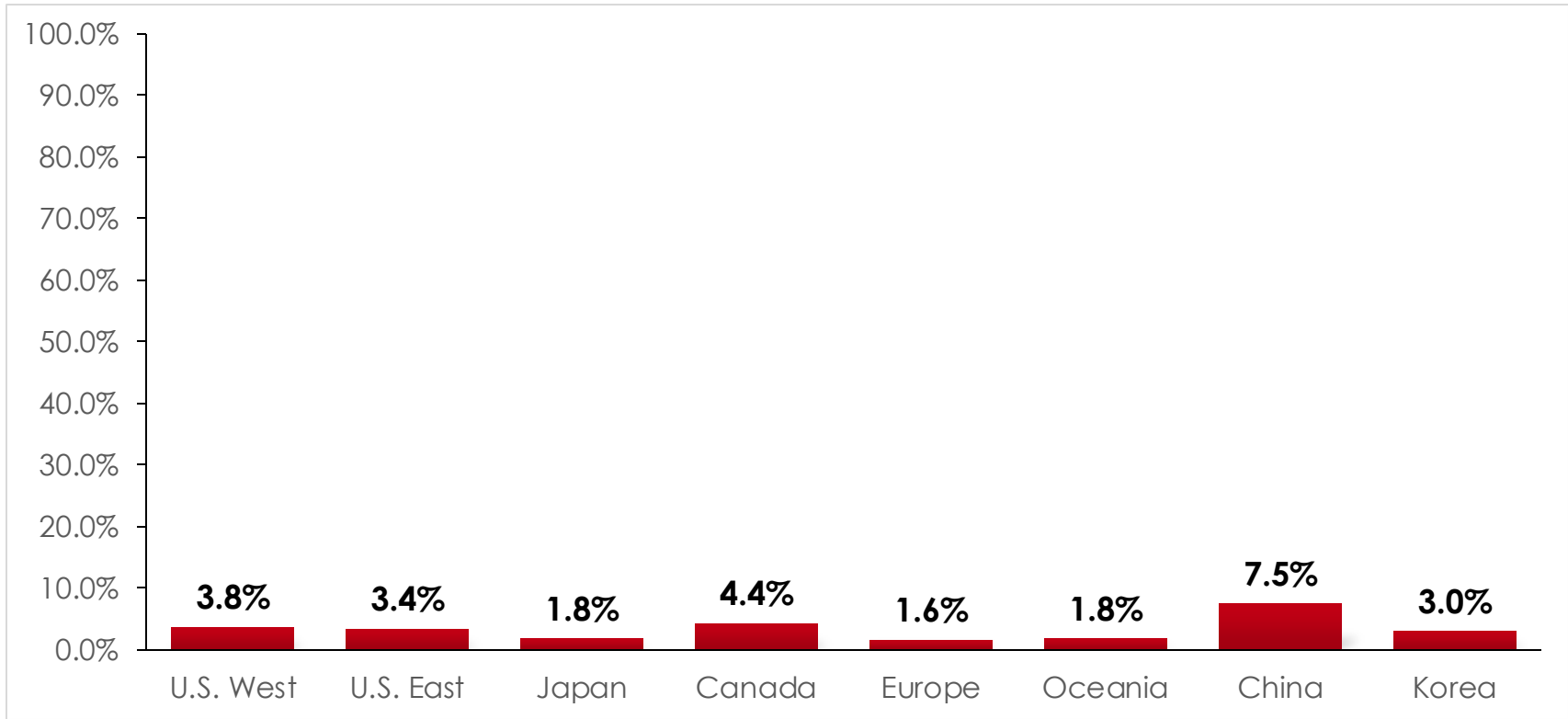
# AIDED ADVERTISING AWARENESS – SENTRY GOLF TOURNAMENT



519 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?

[A]

# AIDED ADVERTISING AWARENESS – XTERRA

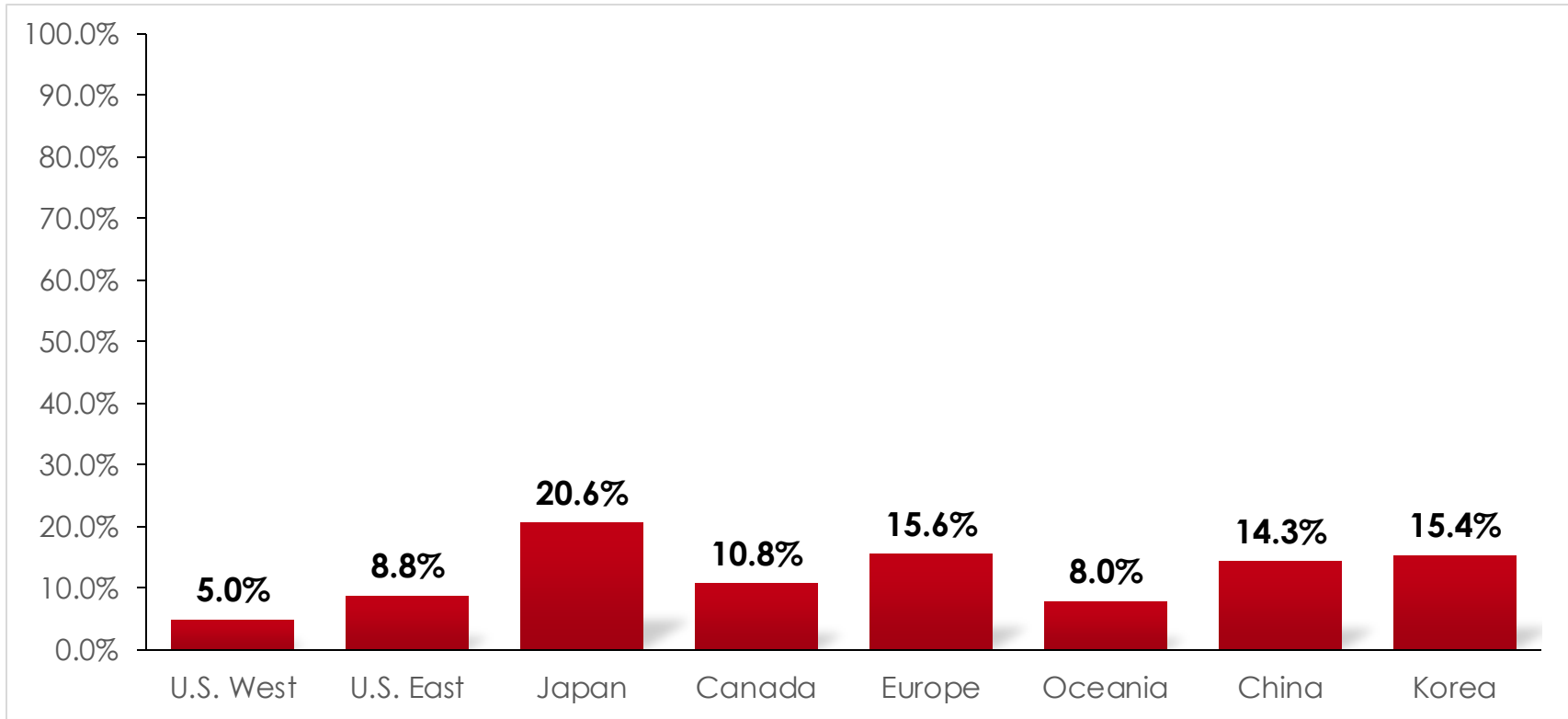


520 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?

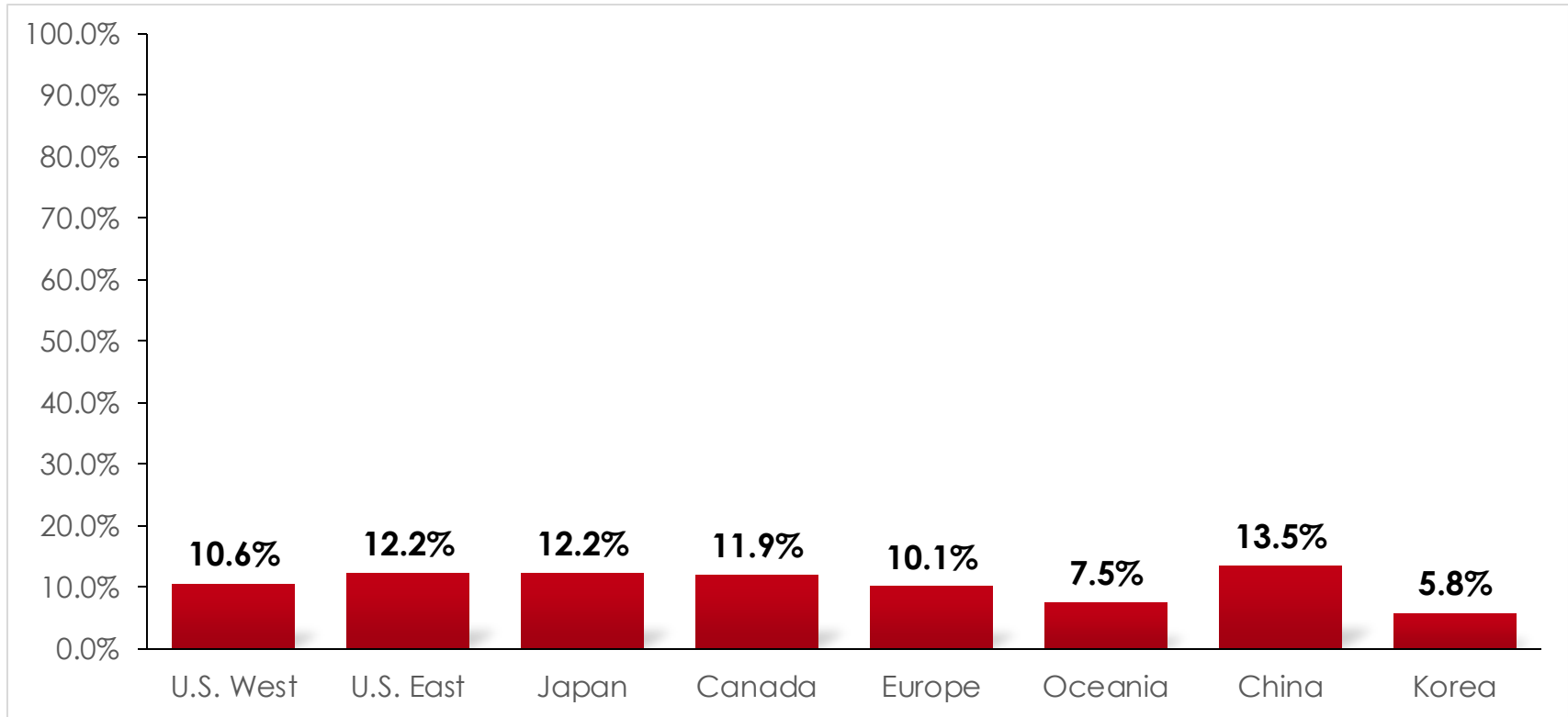
[A]



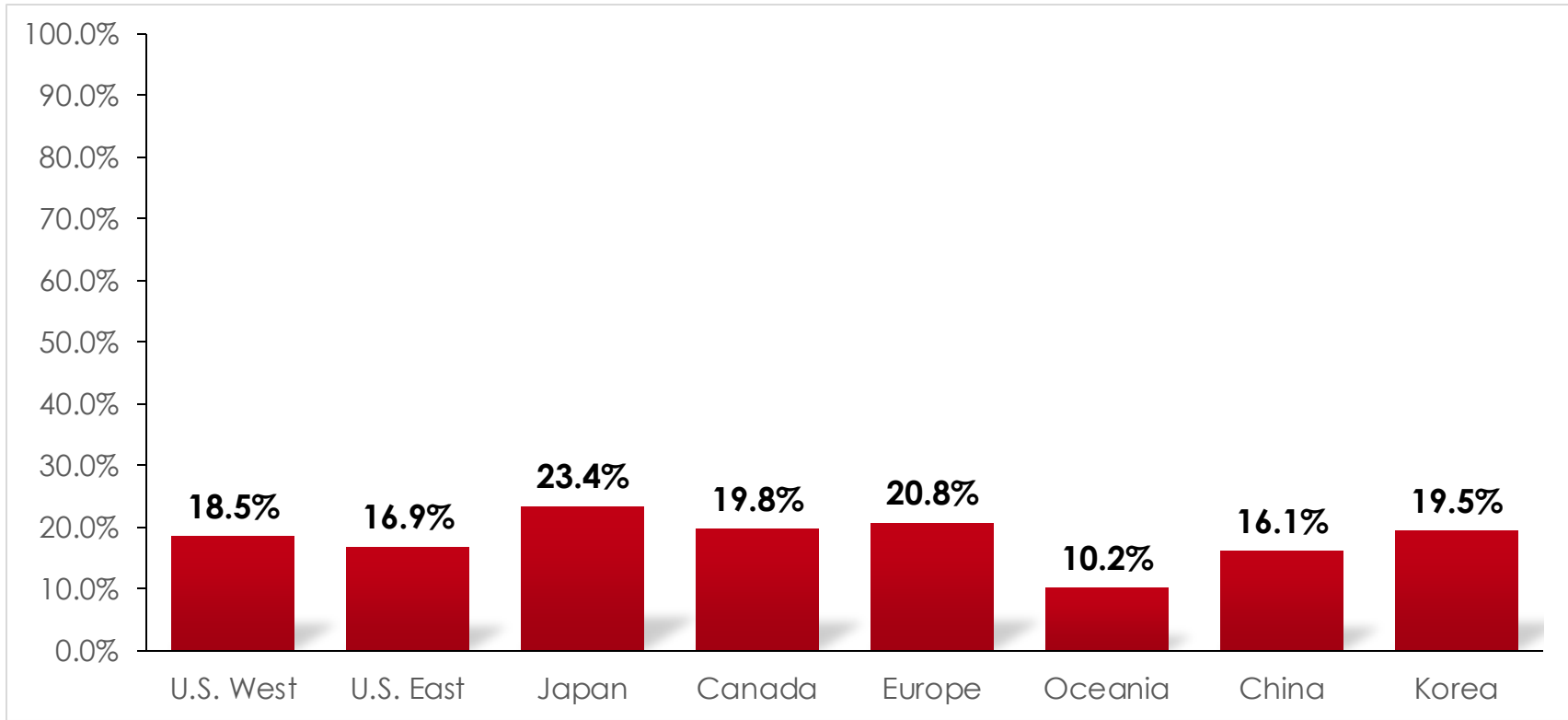
# IMPACT OF LOCATION FILMING – MAUI



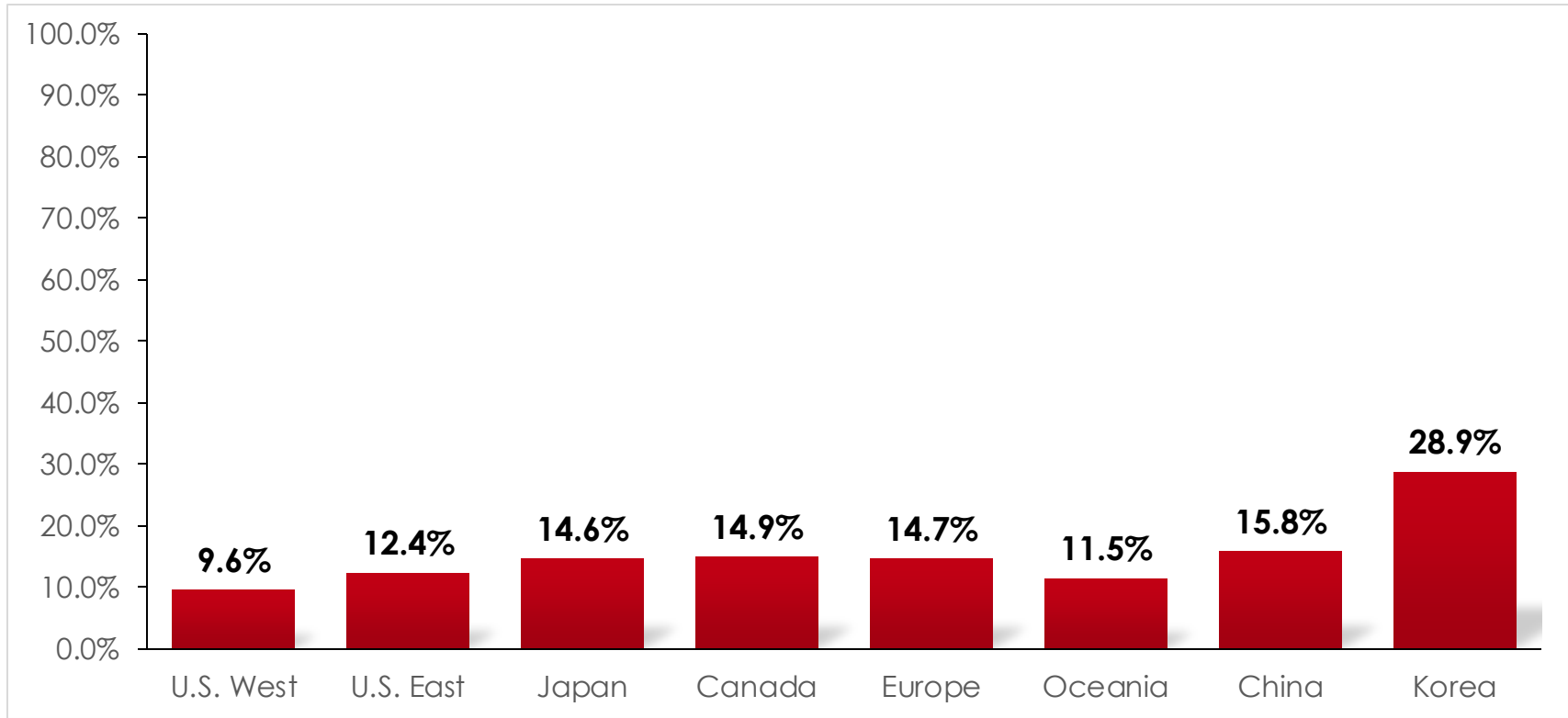
# IMPACT OF HAWAIIAN CULTURAL EVENT – MAUI



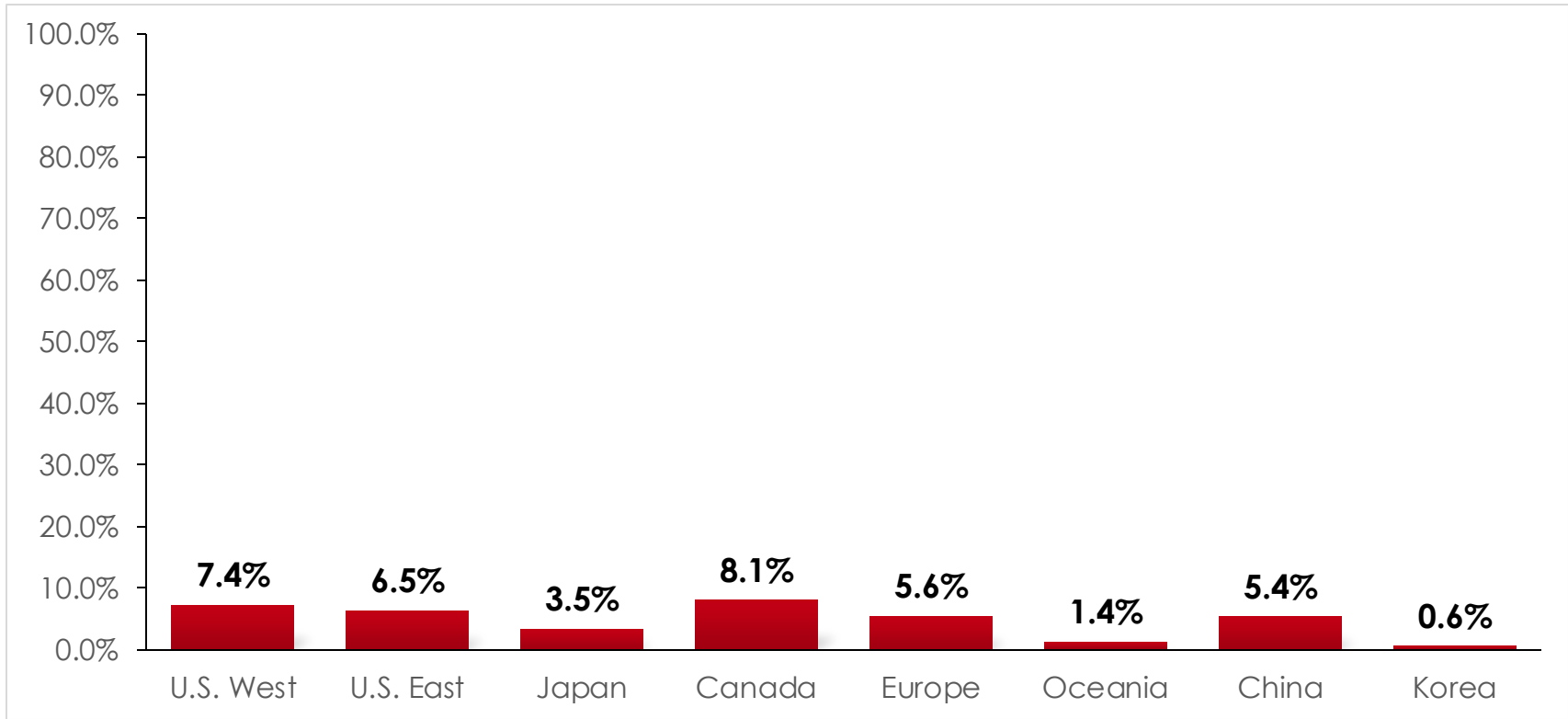
# IMPACT OF OUTDOOR/ SPORTING EVENT – MAUI



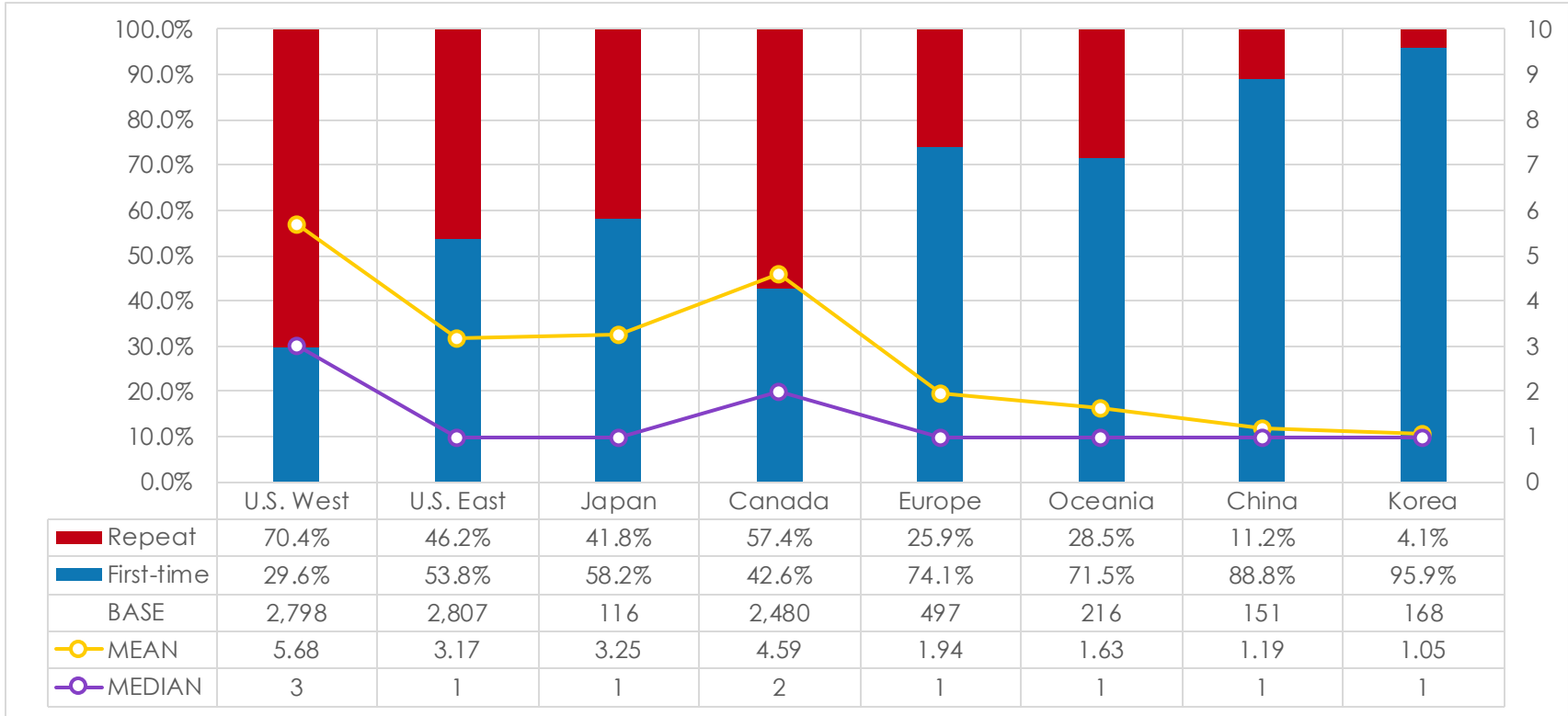
# IMPACT OF SOCIAL MEDIA POST/ VIDEO – MAUI



# IMPACT OF HAWAIIAN MUSIC – MAUI



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - MAUI



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - MAUI

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- U.S. West with college degrees traveled to Maui more frequently than those without a degree.
- Among U.S. visitors, males tended to be more frequent travelers to Maui than females.
- Travelers from U.S. West in smaller travel parties were more frequent visitors to Maui than those who came with three or more persons on their most recent trip.

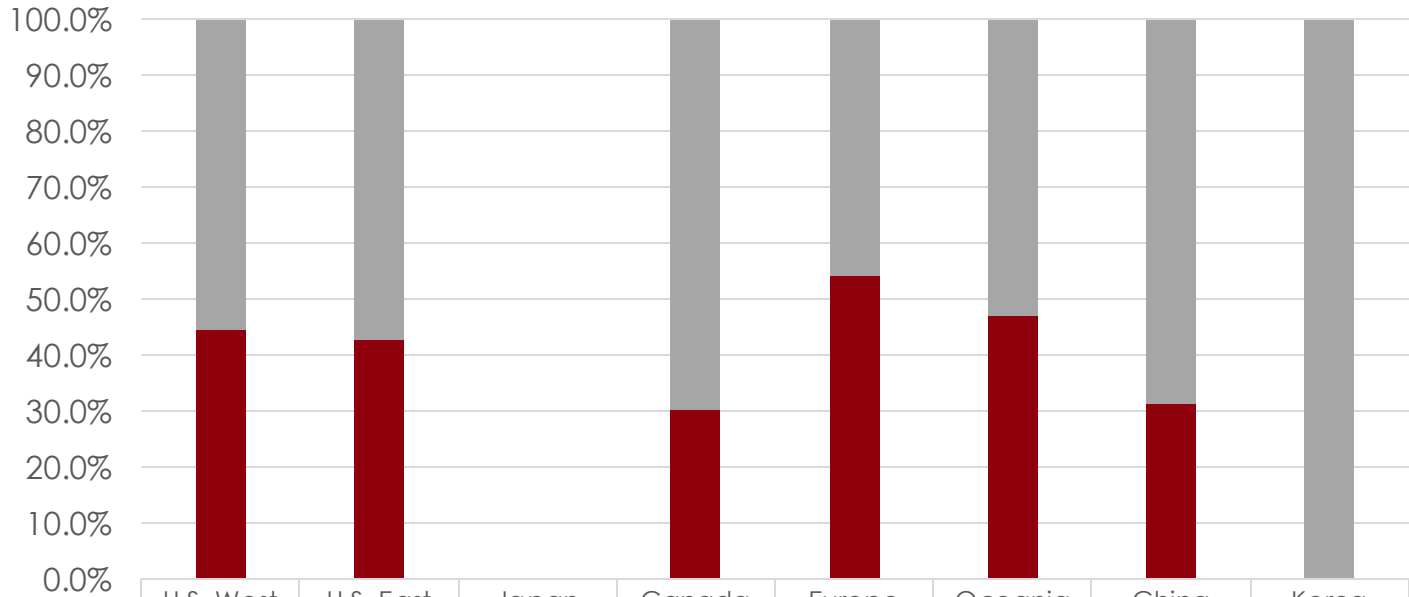
# ACCOMMODATIONS - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Hotel</b>	38.6%	46.1%	54.3%	27.8%	55.0%	56.0%	70.7%	77.2%
<b>Condominium</b>	29.0%	20.5%	19.7%	36.0%	16.7%	14.7%	4.7%	0.6%
<b>Vacation rental (includes AirBnB, VRBO, etc.)</b>	19.3%	19.6%	0.9%	32.8%	14.3%	12.5%	12.0%	4.9%
<b>Timeshare Unit</b>	19.7%	12.4%	7.7%	10.3%	2.8%	5.0%	1.4%	0.0%
<b>Friends or Relatives</b>	6.5%	5.0%	1.8%	4.4%	4.9%	4.0%	4.4%	1.4%
<b>Cruise Ship</b>	1.4%	6.0%	0.9%	2.5%	2.2%	5.6%	1.4%	0.0%
<b>Rental House</b>	1.9%	1.4%	0.0%	2.1%	4.1%	1.4%	0.6%	1.3%
<b>Day trip/ Did not stay overnight</b>	1.3%	1.6%	17.3%	0.5%	1.4%	3.9%	6.6%	11.3%
<b>Camp Site, Beach</b>	1.0%	1.0%	0.9%	1.7%	2.5%	0.4%	0.6%	1.9%
<b>Hostel</b>	0.6%	0.8%	1.7%	1.6%	4.6%	1.7%	2.1%	1.2%



# ACCOMMODATIONS - MAUI

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Visitor area	55.3%	57.2%	0.0%	69.8%	45.7%	53.1%	68.7%	100.0%
■ Residential Neighborhood	44.7%	42.8%	0.0%	30.2%	54.3%	46.9%	31.3%	0.0%
BASE	596	585	0	871	90	27	3	1

# ACCOMMODATIONS - MAUI

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	46.6%	41.0%	0.0%	48.0%	48.5%	38.0%	68.7%	0.0%
Price	17.3%	22.5%	0.0%	19.5%	25.7%	15.2%	31.3%	0.0%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	17.9%	19.3%	0.0%	18.2%	9.9%	21.8%	0.0%	0.0%
Ability to have travel party members stay together	13.9%	14.8%	0.0%	10.4%	14.8%	21.8%	0.0%	0.0%
Owned by self, friend or relative	2.2%	0.7%	0.0%	1.7%	1.0%	3.3%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	20.7%	27.2%	31.1%	22.7%	33.1%	21.0%	36.3%	46.5%
Beach/ ocean	23.7%	15.3%	19.1%	25.4%	17.2%	16.7%	17.7%	15.9%
Variety of activities/ attractions/ many choices	15.7%	19.5%	19.4%	16.3%	16.3%	11.8%	14.7%	17.3%
Feeling of the "Aloha Spirit"	10.1%	9.1%	0.9%	9.8%	12.9%	12.3%	6.2%	2.3%
Overall customer service/ hospitality/ the people	4.7%	6.6%	5.2%	4.5%	5.9%	10.5%	2.6%	2.4%
Local culture/ people/ music	4.2%	4.5%	0.9%	3.3%	3.7%	3.7%	3.2%	3.1%
Food/ restaurant variety/ dining options	4.4%	2.8%	4.4%	2.2%	1.4%	3.5%	5.4%	2.9%
Events/ celebrations with friends/ family	3.5%	3.0%	0.9%	3.1%	2.6%	2.8%	2.0%	0.6%
Accommodations/ was as promised	3.5%	2.7%	7.8%	2.6%	1.0%	5.9%	2.6%	0.0%

## STRENGTHS/ POSITIVE ASPECTS - MAUI

- Younger visitors from the U.S. were more likely to list Maui's natural beauty and the Aloha spirit as positive aspects of their trip than older visitors from the U.S.
- Younger visitors from Japan, or those under 35 were the most likely to cite the variety of activities as something that they liked about their trip to Maui.
- Visitors from U.S. West who do not have a college degree were more likely to mention the aloha spirit and local culture and the people of Maui as things that stood out for them while those with a college degree cited the island's natural beauty and food and dining options more often.
- Female visitors from U.S. West mentioned Maui's beaches more often than males when asked to identify highlights from their trip. Conversely, males list the variety of activities more so than females as what they liked about Maui.

# AREAS OF OPPORTUNITIES - MAUI

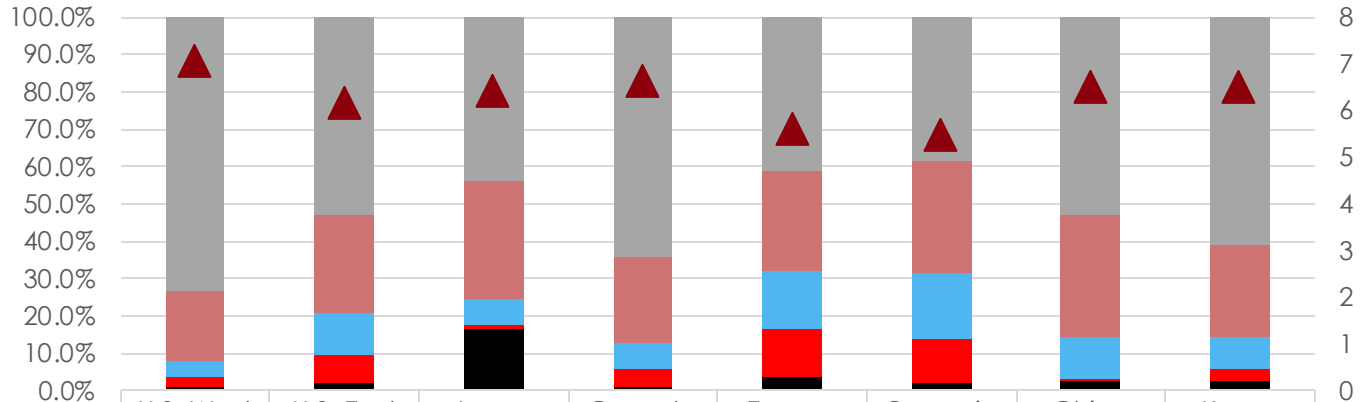
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>No negatives/ everything was great</b>	46.3%	49.6%	34.6%	46.5%	44.7%	48.4%	42.8%	28.0%
<b>Traffic (congested/slow)</b>	10.9%	10.2%	1.7%	8.5%	5.8%	2.8%	1.2%	2.9%
<b>Would like to experience more local culture</b>	7.5%	6.7%	4.4%	7.4%	12.3%	5.6%	5.0%	9.1%
<b>Driving experience</b>	6.1%	5.3%	4.3%	6.0%	3.4%	5.2%	5.4%	3.6%
<b>Rental car experience</b>	6.0%	4.9%	5.2%	4.6%	4.0%	4.6%	2.6%	4.2%
<b>Food/ restaurant variety/ dining options</b>	2.9%	3.4%	7.9%	3.7%	4.6%	7.9%	12.7%	13.7%
<b>Cost/Expensive</b>	2.8%	3.1%	2.6%	6.1%	4.5%	4.9%	0.6%	0.6%
<b>Food/ restaurant quality</b>	1.8%	1.2%	9.6%	2.0%	2.6%	2.4%	3.9%	7.2%
<b>Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.</b>	1.2%	1.6%	12.2%	1.8%	4.1%	3.4%	8.0%	8.7%

# AREAS OF OPPORTUNITIES - MAUI

- Older visitors from U.S. West were more likely to complain about the traffic on Maui while younger visitors from this market would like to experience more of the local culture.
- Younger visitors from U.S. West were also more likely to complain about the dining experience on Maui, more so than older visitors from this market.

# LIKELIHOOD OF RETURN VISIT – MAUI

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	73.3%	52.8%	44.2%	64.1%	41.2%	38.5%	52.7%	61.0%
Somewhat likely (5-6)	18.8%	26.6%	31.4%	23.3%	26.6%	29.8%	32.5%	24.4%
Somewhat unlikely (3-4)	4.4%	11.1%	7.0%	6.9%	15.8%	17.6%	11.3%	8.7%
Very unlikely (1-2)	2.3%	7.3%	0.9%	4.8%	12.6%	12.1%	0.6%	3.5%
Not sure	1.2%	2.2%	16.6%	1.0%	3.9%	2.0%	2.7%	2.4%
BASE	2,768	2,776	115	2,459	492	213	151	168
MEAN	7.07	6.20	6.44	6.67	5.63	5.51	6.51	6.52

# LIKELIHOOD OF RETURN VISIT – MAUI

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- When segmented by level of education, we find those without a college degree from U.S. West, U.S. East, and Canada more likely to return to Maui than those with college degrees from these markets.
- Among visitors to Maui from U.S. West, females expressed a stronger desire to return to Maui than their male counterparts.
- Visitors from the U.S. who traveled to Maui alone on this most recent trip were the most likely to return to the island in the near future compared to those in larger travel parties.

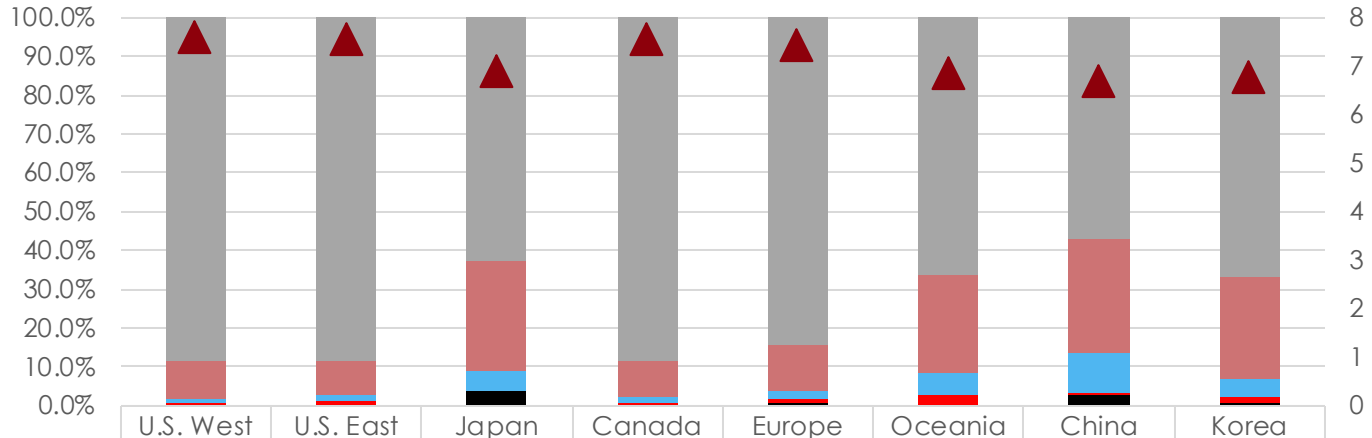


# REASONS FOR NOT RETURNING - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	49.8%	47.9%	43.0%	54.6%	41.4%	55.5%	49.2%	24.6%
Too expensive/cost	31.2%	42.8%	21.3%	49.9%	43.2%	26.4%	28.0%	23.8%
Flight too long	6.4%	32.4%	0.0%	27.6%	58.6%	4.8%	44.0%	7.9%
Not enough value for the price	17.4%	11.2%	0.0%	12.8%	9.7%	15.0%	28.0%	35.7%
No reason to return/ nothing new	12.5%	9.8%	10.7%	9.7%	6.5%	16.6%	13.6%	43.7%
Other financial obligations	9.2%	12.1%	7.3%	8.4%	5.9%	7.5%	0.0%	7.9%
Too crowded/ congested/ traffic	12.5%	8.1%	0.0%	7.7%	1.8%	1.3%	5.1%	0.0%
Too commercial/ overdeveloped	12.0%	6.9%	0.0%	8.7%	9.0%	3.1%	0.0%	4.0%
Poor health/ age restriction	4.2%	4.9%	3.5%	2.9%	0.7%	4.4%	0.0%	0.0%
Unfriendly people/ felt unwelcome	6.4%	2.8%	0.0%	2.2%	2.6%	0.0%	4.2%	4.0%
Inconvenient travel connections	0.5%	3.5%	17.6%	4.0%	1.3%	1.3%	23.7%	0.0%
Nothing to do/ boring	3.7%	1.9%	3.7%	1.8%	0.7%	3.5%	0.0%	23.8%

# MAUI - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	88.3%	88.3%	62.5%	88.3%	84.4%	66.6%	57.1%	67.1%
■ Somewhat likely (5-6)	9.8%	9.1%	28.8%	9.6%	11.9%	24.9%	29.6%	25.8%
■ Somewhat unlikely (3-4)	1.2%	1.5%	5.2%	1.2%	2.0%	5.9%	10.0%	4.8%
■ Very unlikely (1-2)	0.5%	0.9%	0.0%	0.7%	1.1%	2.7%	0.6%	1.7%
■ Not sure	0.2%	0.2%	3.5%	0.2%	0.6%	0.0%	2.7%	0.6%
BASE	2,747	2,765	115	2,455	491	212	151	168
▲ MEAN	7.58	7.52	6.88	7.54	7.42	6.83	6.66	6.74

## MAUI ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.0%	96.4%	92.2%	96.8%	95.2%	90.8%	96.0%	98.8%
<b>On own (self-guided)</b>	83.8%	81.2%	63.3%	86.5%	75.6%	57.0%	57.0%	82.1%
<b>Helicopter/ airplane</b>	4.7%	7.5%	1.8%	5.5%	7.5%	7.6%	6.1%	2.4%
<b>Boat/ submarine/ whale</b>	32.0%	40.2%	13.0%	30.4%	32.3%	23.0%	34.0%	17.4%
<b>Visit towns</b>	57.6%	57.5%	27.8%	60.9%	46.2%	41.3%	31.3%	22.6%
<b>Limo/ van/ bus tour</b>	4.6%	13.8%	8.7%	6.3%	10.0%	16.6%	9.4%	7.6%
<b>Scenic views/ natural landmark</b>	56.0%	65.0%	28.7%	61.4%	55.8%	46.8%	53.5%	50.5%
<b>Movie/ TV/ film location</b>	0.9%	1.1%	2.6%	0.8%	1.7%	0.6%	3.9%	4.3%

# MAUI ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	97.2%	96.7%	90.5%	98.8%	97.6%	90.0%	93.5%	95.9%
<b>Beach/ sunbathing</b>	87.4%	84.8%	60.1%	92.6%	88.0%	71.6%	72.7%	63.8%
<b>Bodyboard/ Standup paddle board</b>	15.1%	8.8%	5.2%	18.0%	11.4%	6.7%	3.2%	3.5%
<b>Surfing</b>	6.5%	6.1%	0.0%	10.6%	14.4%	5.2%	6.7%	7.9%
<b>Canoeing/ kayak</b>	4.2%	3.9%	0.9%	3.1%	3.7%	2.1%	6.2%	2.3%
<b>Swim- ocean</b>	71.8%	67.1%	30.5%	80.4%	72.4%	67.5%	27.4%	31.5%
<b>Snorkel</b>	55.1%	47.1%	22.6%	59.6%	53.9%	36.8%	25.1%	35.8%
<b>Windsurf/ Kitesurf</b>	0.5%	0.4%	1.7%	0.6%	3.2%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	2.7%	1.7%	0.9%	1.1%	1.1%	1.3%	0.6%	0.6%
<b>Scuba</b>	4.1%	3.9%	1.8%	2.7%	4.7%	1.4%	0.0%	1.2%
<b>Fishing</b>	3.0%	3.0%	0.0%	2.5%	0.4%	1.0%	2.1%	0.0%
<b>Golf</b>	8.1%	7.3%	3.4%	8.6%	3.6%	5.4%	3.0%	3.1%

# MAUI ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	97.2%	96.7%	90.5%	98.8%	97.6%	90.0%	93.5%	95.9%
<b>Run/ Jog/ Fitness walk</b>	29.3%	26.8%	12.1%	29.9%	16.9%	20.5%	7.4%	3.1%
<b>Spa</b>	11.7%	11.5%	3.4%	8.0%	6.1%	7.5%	6.1%	7.8%
<b>Hiking</b>	42.2%	45.8%	11.3%	45.0%	35.4%	22.6%	32.2%	20.0%
<b>Backpack/Camping</b>	1.4%	2.0%	0.0%	2.4%	2.3%	1.4%	2.6%	2.4%
<b>Agritourism</b>	10.8%	11.7%	13.9%	8.0%	4.2%	4.2%	5.2%	7.8%
<b>Sport event/ tournament</b>	2.2%	2.3%	0.9%	2.0%	0.4%	0.0%	0.7%	1.2%
<b>Park/ botanical garden</b>	29.9%	37.1%	13.9%	33.2%	31.4%	18.1%	22.9%	19.6%
<b>Waterpark</b>	1.1%	0.8%	1.7%	0.9%	1.3%	1.0%	5.4%	3.6%
<b>Mountain tube/ waterfall rappel</b>	0.6%	0.9%	1.8%	0.7%	2.0%	0.0%	1.2%	1.9%
<b>Zip-lining</b>	7.3%	6.1%	3.5%	3.9%	2.2%	3.5%	2.7%	0.0%
<b>Skydiving</b>	0.2%	0.1%	0.0%	0.2%	0.4%	0.0%	4.1%	0.6%
<b>All terrain vehicle (ATV)</b>	1.1%	1.4%	0.9%	0.9%	1.4%	0.6%	3.9%	0.6%
<b>Horseback riding</b>	1.1%	1.6%	4.4%	1.1%	1.2%	0.9%	3.6%	0.0%

541 Q During this trip, which of the following activities did you participate in?

# MAUI ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.4%	97.9%	89.6%	98.6%	98.0%	97.5%	97.5%	96.5%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	23.3%	28.1%	10.4%	20.9%	29.8%	17.3%	53.2%	33.7%
<b>Live music/ stage show</b>	29.4%	33.2%	13.9%	27.5%	25.7%	18.2%	18.3%	11.4%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.2%	6.9%	2.7%	5.6%	5.6%	4.7%	7.5%	1.2%
<b>Fine dining</b>	60.3%	60.3%	32.2%	47.8%	43.8%	38.5%	42.9%	37.3%
<b>Family restaurant</b>	60.4%	54.8%	18.3%	62.9%	46.0%	58.6%	15.8%	28.3%
<b>Fast food</b>	28.3%	27.3%	33.0%	37.5%	34.1%	33.2%	37.3%	36.5%
<b>Food truck</b>	27.4%	27.4%	7.0%	34.7%	28.5%	17.1%	19.4%	22.3%
<b>Café/ coffee house</b>	44.5%	40.7%	41.7%	48.7%	49.3%	53.6%	28.8%	35.4%
<b>Ethnic dining</b>	26.8%	29.3%	5.2%	23.6%	19.5%	10.4%	17.5%	20.7%
<b>Prepared own meal</b>	55.5%	41.5%	22.6%	73.6%	36.3%	33.5%	21.2%	11.8%

# MAUI ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.2%	95.8%	90.4%	96.7%	96.6%	96.7%	92.1%	92.4%
<b>Mall/ department store</b>	43.3%	37.3%	63.6%	54.2%	51.1%	43.4%	38.0%	35.4%
<b>Designer boutique</b>	19.9%	18.8%	13.8%	19.7%	13.4%	18.7%	7.6%	2.0%
<b>Hotel/ resort store</b>	35.0%	37.8%	31.3%	26.9%	26.3%	33.9%	24.6%	16.1%
<b>Swap meet/ flea market</b>	14.8%	11.3%	4.3%	19.7%	3.2%	3.9%	2.7%	0.0%
<b>Discount/ outlet store</b>	20.3%	16.2%	18.2%	27.9%	19.3%	32.6%	27.3%	40.1%
<b>Supermarket</b>	71.1%	62.1%	54.8%	76.0%	67.3%	54.9%	57.9%	43.3%
<b>Farmer's market</b>	30.9%	24.8%	10.5%	38.5%	23.0%	18.2%	11.8%	1.9%
<b>Convenience store</b>	46.5%	45.2%	31.2%	49.9%	26.8%	48.1%	30.2%	27.9%
<b>Duty free store</b>	3.7%	3.0%	13.1%	5.0%	5.3%	4.4%	29.5%	12.0%
<b>Local shop/ artisan</b>	68.4%	71.1%	18.2%	65.9%	60.6%	51.4%	25.4%	12.0%

# MAUI ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	64.1%	67.8%	44.5%	62.9%	57.6%	54.4%	62.7%	50.7%
<b>Historic military site</b>	3.7%	5.1%	13.9%	3.7%	4.4%	4.5%	15.6%	6.6%
<b>Other historical site</b>	20.6%	22.5%	24.4%	18.9%	20.5%	17.2%	19.2%	26.7%
<b>Museum/ art gallery</b>	20.9%	16.4%	3.5%	18.1%	12.1%	17.7%	12.0%	2.4%
<b>Luau/ Polynesian show/ hula show</b>	26.9%	39.4%	7.8%	30.8%	27.6%	23.0%	17.1%	12.5%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	6.5%	6.1%	2.6%	6.9%	7.1%	3.7%	11.2%	4.2%
<b>Play/ concert/ theatre</b>	4.8%	2.6%	0.9%	3.7%	2.6%	1.3%	1.4%	0.0%
<b>Art/ craft fair</b>	17.0%	12.3%	0.9%	13.8%	7.0%	6.8%	14.3%	3.2%
<b>Festival event</b>	4.0%	3.5%	0.9%	3.3%	2.1%	1.5%	2.2%	1.7%



# MAUI ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	94.7%	96.5%	93.0%	96.0%	96.9%	94.2%	88.8%	95.9%
<b>Airport shuttle</b>	11.1%	12.0%	20.9%	13.7%	16.1%	26.2%	13.0%	7.7%
<b>Trolley</b>	3.3%	2.5%	21.0%	4.2%	2.4%	4.8%	4.9%	3.0%
<b>Public bus</b>	2.1%	2.3%	6.1%	3.8%	6.5%	13.0%	2.7%	2.3%
<b>Tour bus/ tour van</b>	4.7%	14.7%	21.7%	6.9%	10.3%	18.2%	14.2%	15.4%
<b>Taxi/ limo</b>	3.3%	6.5%	15.6%	6.9%	13.9%	17.5%	10.2%	8.8%
<b>Rental car</b>	87.4%	83.7%	42.4%	88.1%	74.6%	52.5%	57.4%	72.8%
<b>Ride share</b>	10.5%	12.5%	6.0%	9.7%	13.9%	16.9%	10.8%	3.6%
<b>Bicycle rental</b>	1.2%	1.8%	2.6%	1.7%	2.0%	2.4%	1.9%	0.0%

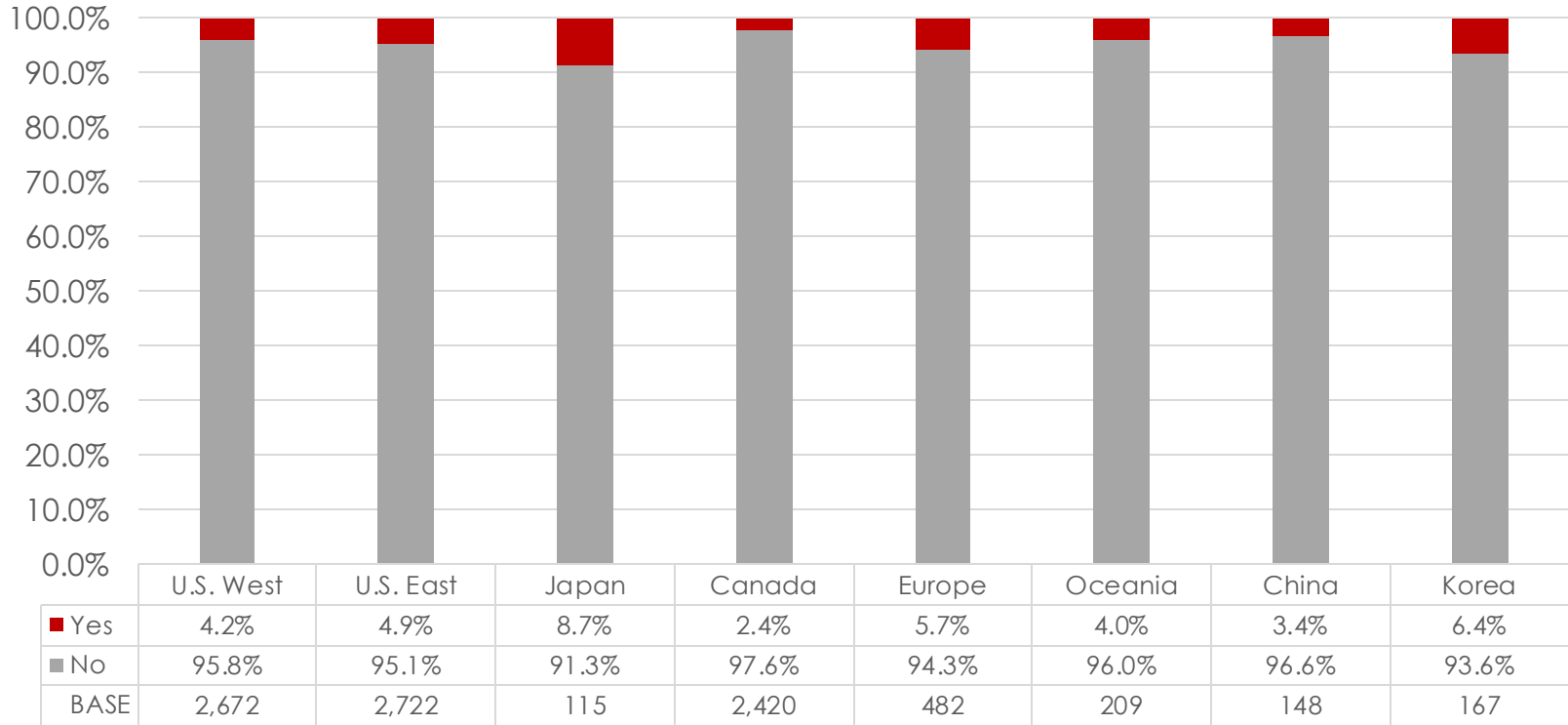
## MAUI ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	21.4%	15.5%	15.7%	17.4%	10.1%	14.3%	12.2%	18.2%
Visit friends/ family	21.0%	15.1%	14.8%	17.0%	9.1%	13.9%	11.0%	17.7%
Volunteer- non-profit	0.5%	0.5%	0.9%	0.6%	1.2%	0.9%	2.0%	1.2%

# ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	3.3%	2.8%	1.7%	3.5%	1.6%	0.0%	6.2%	7.1%
Aquarium Maui /Maui Ocean Center	18.6%	17.8%	6.2%	25.0%	11.7%	8.8%	28.5%	5.7%
Baldwin Missionary Home Museum	5.5%	4.4%	0.9%	4.7%	5.7%	4.6%	2.7%	1.9%
Hale Pa'i Printing House	0.2%	0.5%	0.9%	0.3%	0.6%	0.4%	0.6%	0.0%
Haleakala National Park	29.9%	45.0%	34.0%	42.2%	48.3%	27.2%	43.1%	57.3%
Haleki'i-Pihana Heiau State Monument	1.6%	3.1%	2.6%	2.5%	3.3%	1.0%	4.1%	2.7%
Hana Cultural Center	8.4%	15.6%	3.5%	12.3%	19.3%	10.3%	28.3%	4.5%
'Iao Valley State Monument	15.4%	15.4%	12.9%	19.2%	18.7%	5.5%	2.6%	11.0%
Kepanaiwai Park/ Heritage Gardens	3.1%	4.8%	1.8%	4.7%	5.7%	5.1%	13.0%	2.6%
Kula Botanical Garden	6.2%	7.3%	7.0%	7.9%	8.0%	5.7%	12.0%	4.3%
Maui Historical Society Bailey House Museum	3.3%	3.3%	1.8%	2.5%	2.1%	3.1%	2.0%	1.9%
Whaler's Village Museum	16.1%	15.2%	7.7%	12.5%	12.4%	16.0%	17.7%	3.1%
Wo Hing Temple Museum	2.3%	2.1%	0.9%	2.2%	1.8%	2.2%	8.6%	0.6%

# VISITED MAUI FOR SPECIFIC EVENT



# VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wedding/Honeymoon/Anniversary/Birthday/Funeral	28.2%	16.1%	0.0%	29.5%	22.3%	67.4%	0.0%	9.1%
Convention/Conference/Retreat/Seminar/Meeting/Workshop/Training	17.2%	30.4%	40.2%	16.4%	33.2%	0.0%	22.2%	9.1%
Maui Marathon	8.1%	14.5%	19.7%	4.0%	0.0%	0.0%	22.2%	0.0%
Other Festival/concert	9.1%	4.4%	0.0%	1.6%	3.5%	10.9%	0.0%	0.0%
Sentry Tournament of Golf Champions	9.2%	4.0%	0.0%	3.6%	3.5%	0.0%	0.0%	0.0%
Other sporting event	7.2%	4.0%	0.0%	9.5%	3.9%	10.9%	0.0%	0.0%
Hawaii Food and Wine Festival	3.7%	3.1%	20.1%	10.8%	3.5%	0.0%	18.5%	63.6%
Maui Jim Maui Invitational	4.6%	7.0%	0.0%	2.0%	3.9%	0.0%	0.0%	0.0%
Whale Watching	1.8%	2.4%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%
Maui Film Festival	1.8%	1.5%	0.0%	2.0%	0.0%	0.0%	18.5%	0.0%
Kapalua Food & Wine Festival	1.8%	0.8%	0.0%	2.0%	3.5%	10.9%	0.0%	0.0%
Xterra	0.9%	0.0%	0.0%	9.5%	3.9%	0.0%	0.0%	0.0%
American Windsurfing Tour	0.0%	0.0%	10.2%	0.0%	0.0%	0.0%	0.0%	0.0%

Q. Which festival/ event did you visit Maui to attend?

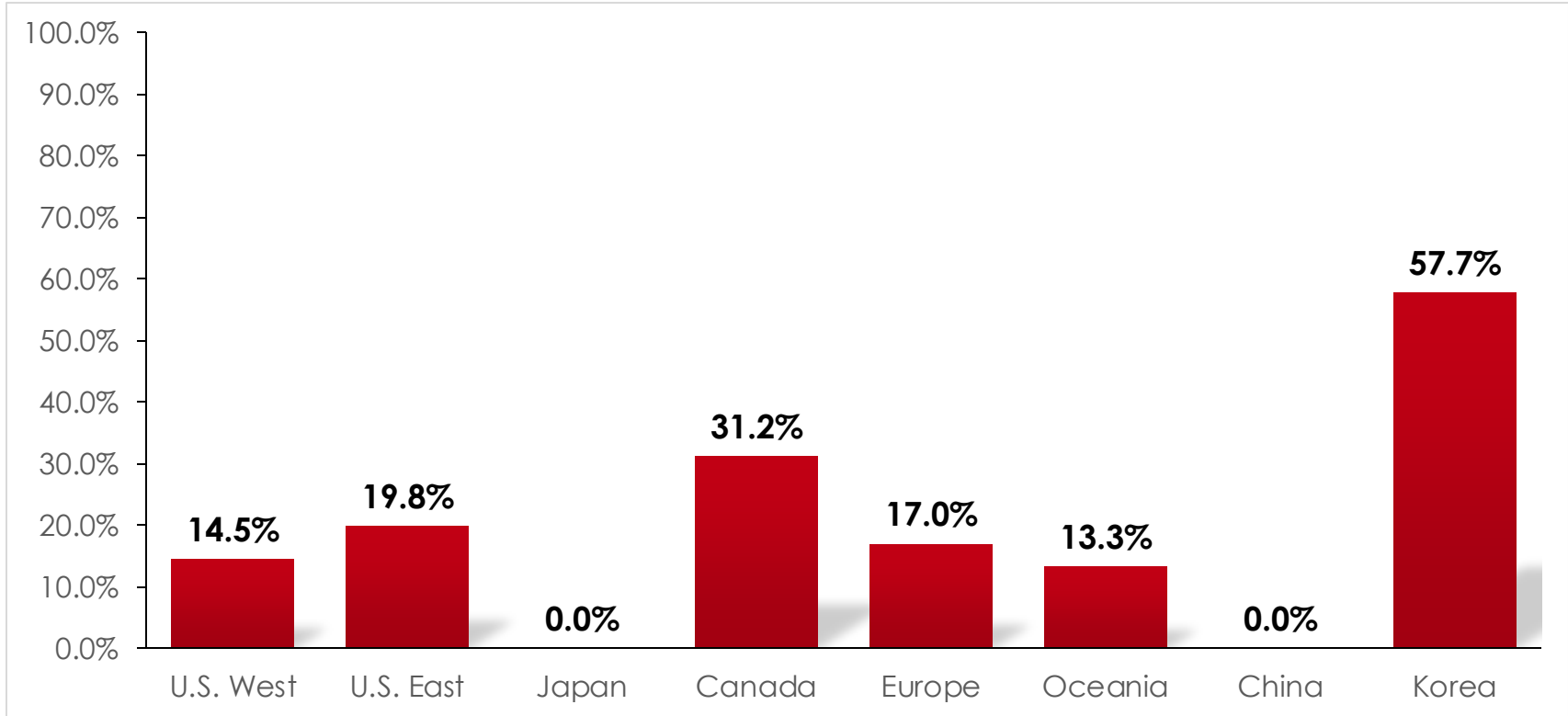
# SECTION – ISLAND OF MOLOKA‘I

# MAUI - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Female visitors from U.S. West, U.S. East, and Canada were stronger advocates for Maui than males from these visitor markets.
- Female visitors to Maui from the U.S. were also stronger advocates for Maui than their male counterparts.

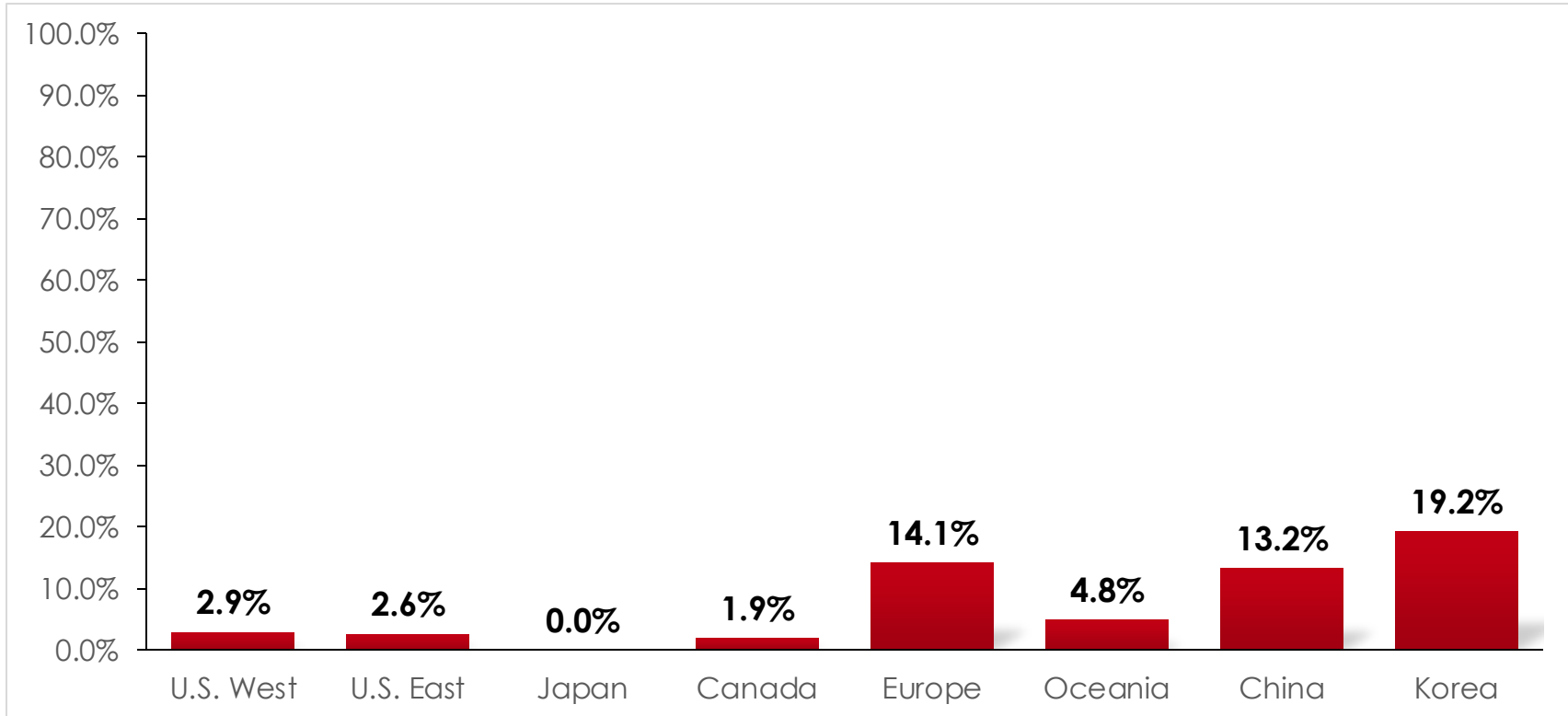
# AIDED ADVERTISING AWARENESS – MOLOKA‘I



Sample sizes for Moloka'i are relatively small.

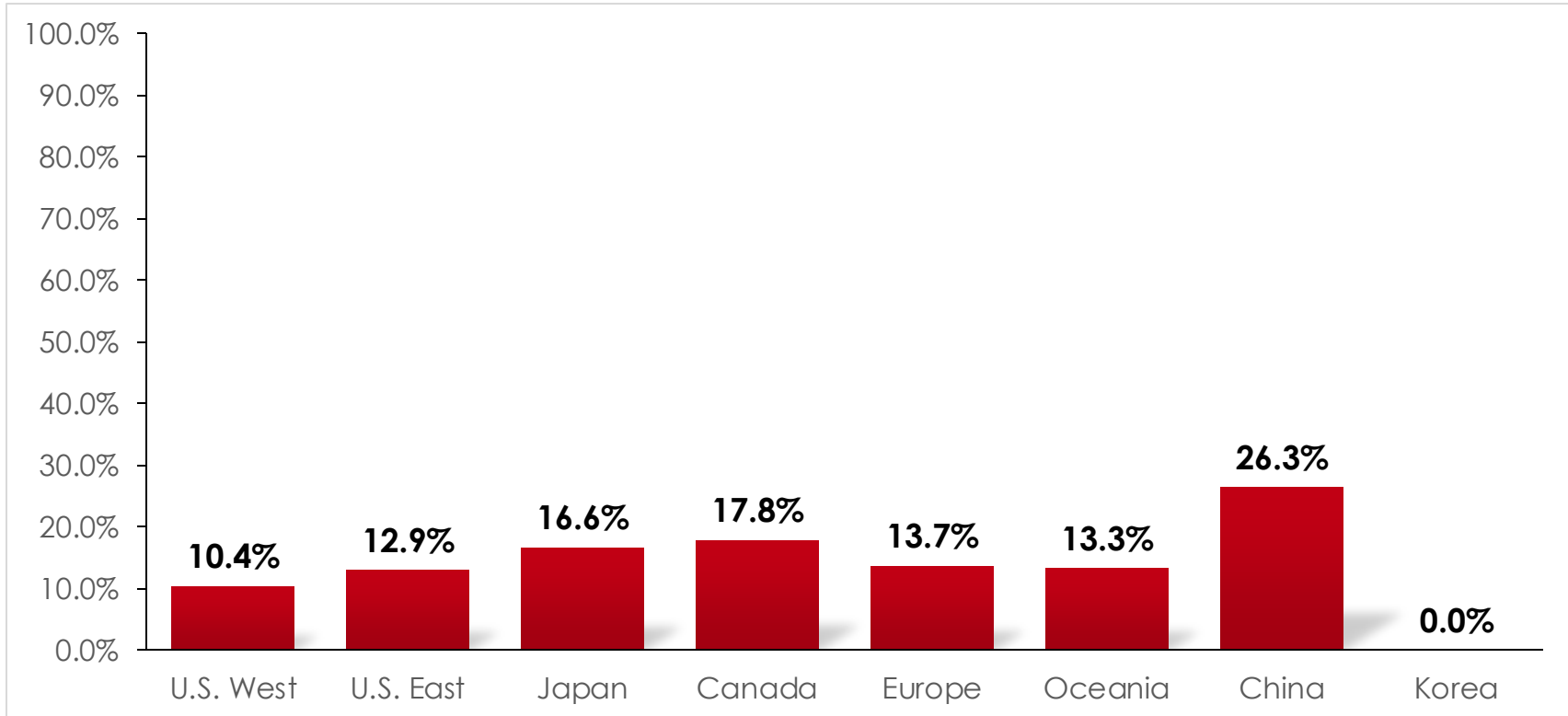


# IMPACT OF LOCATION FILMING—MOLOKA‘I



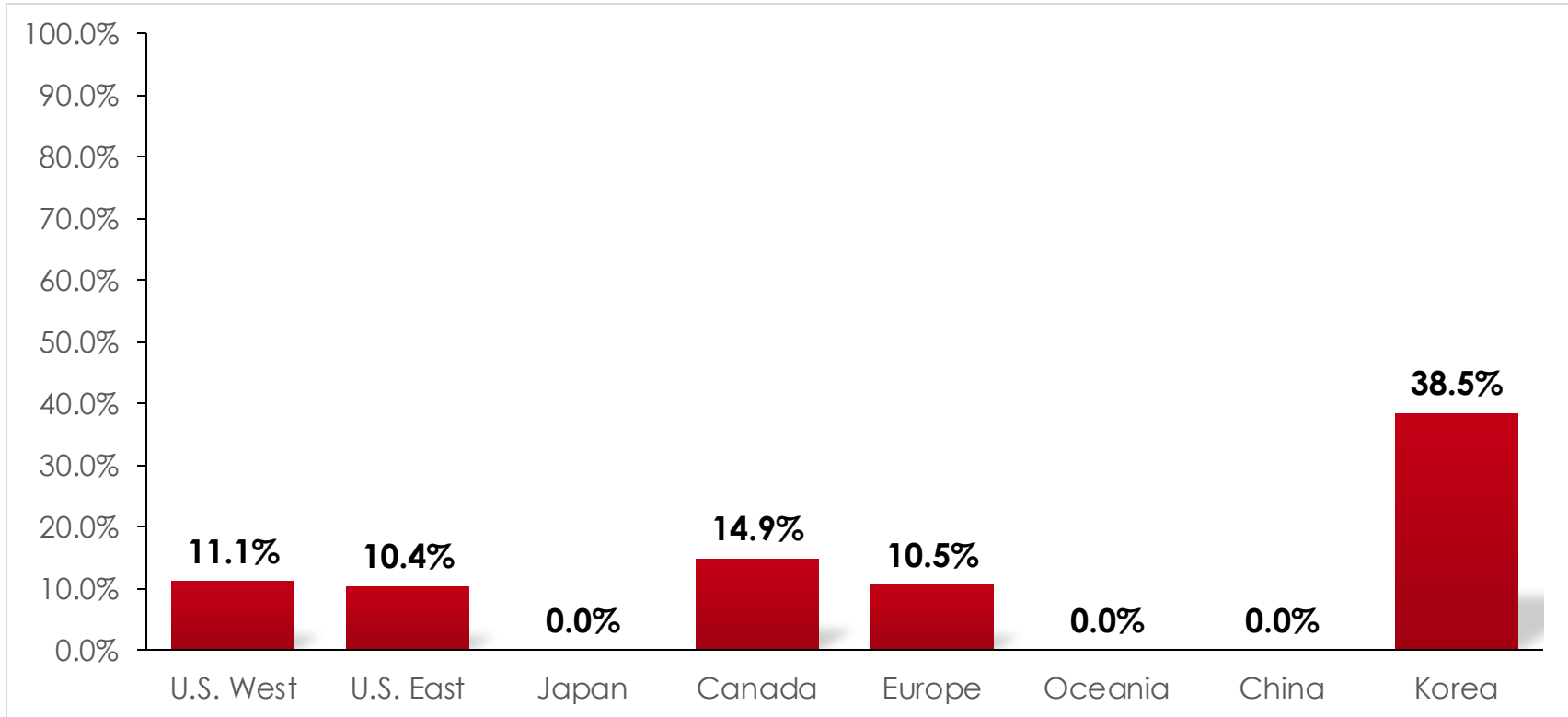
Sample sizes for Moloka'i are relatively small.

# IMPACT OF HAWAIIAN CULTURAL EVENT – MOLOKA‘I



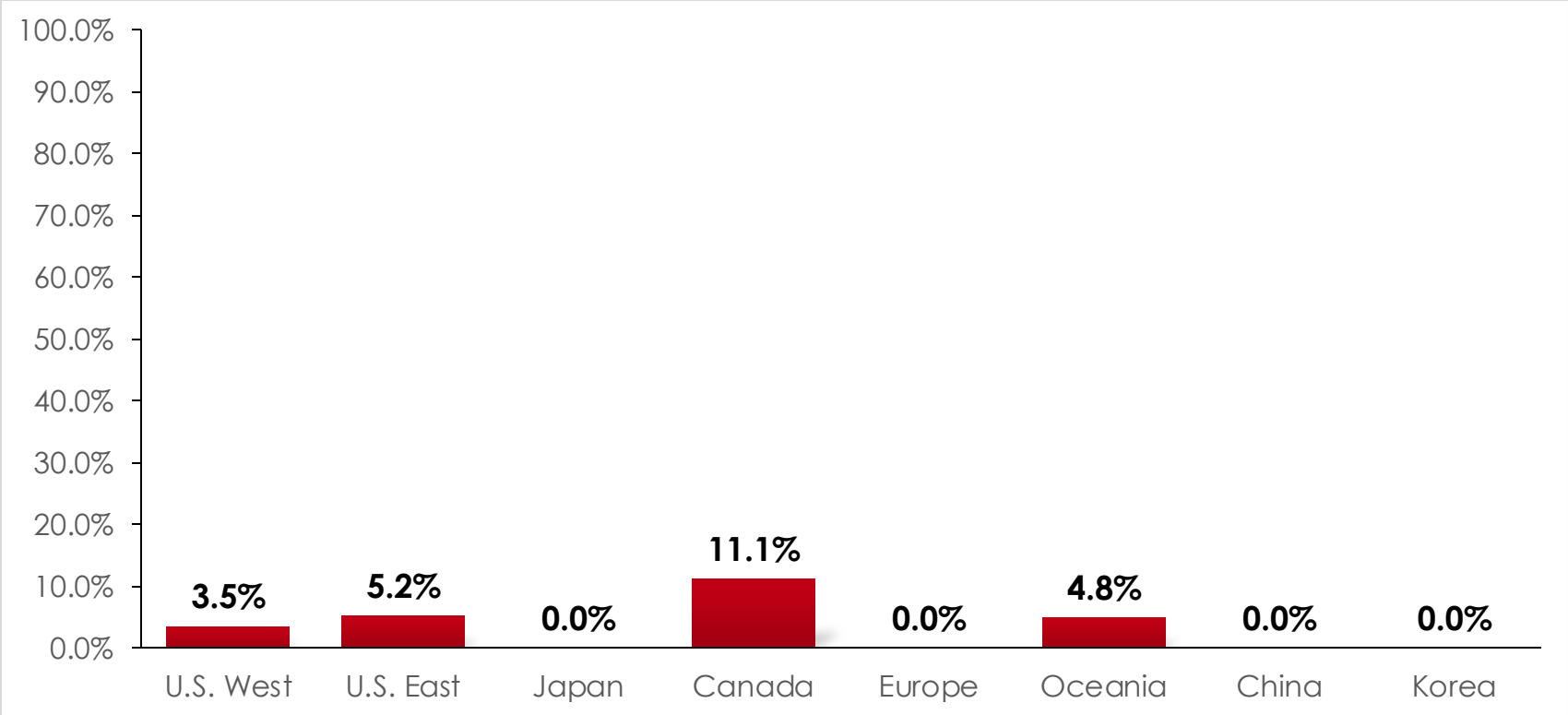
Sample sizes for Moloka'i are relatively small.

# IMPACT OF OUTDOOR/ SPORTING EVENT – MOLOKA‘I



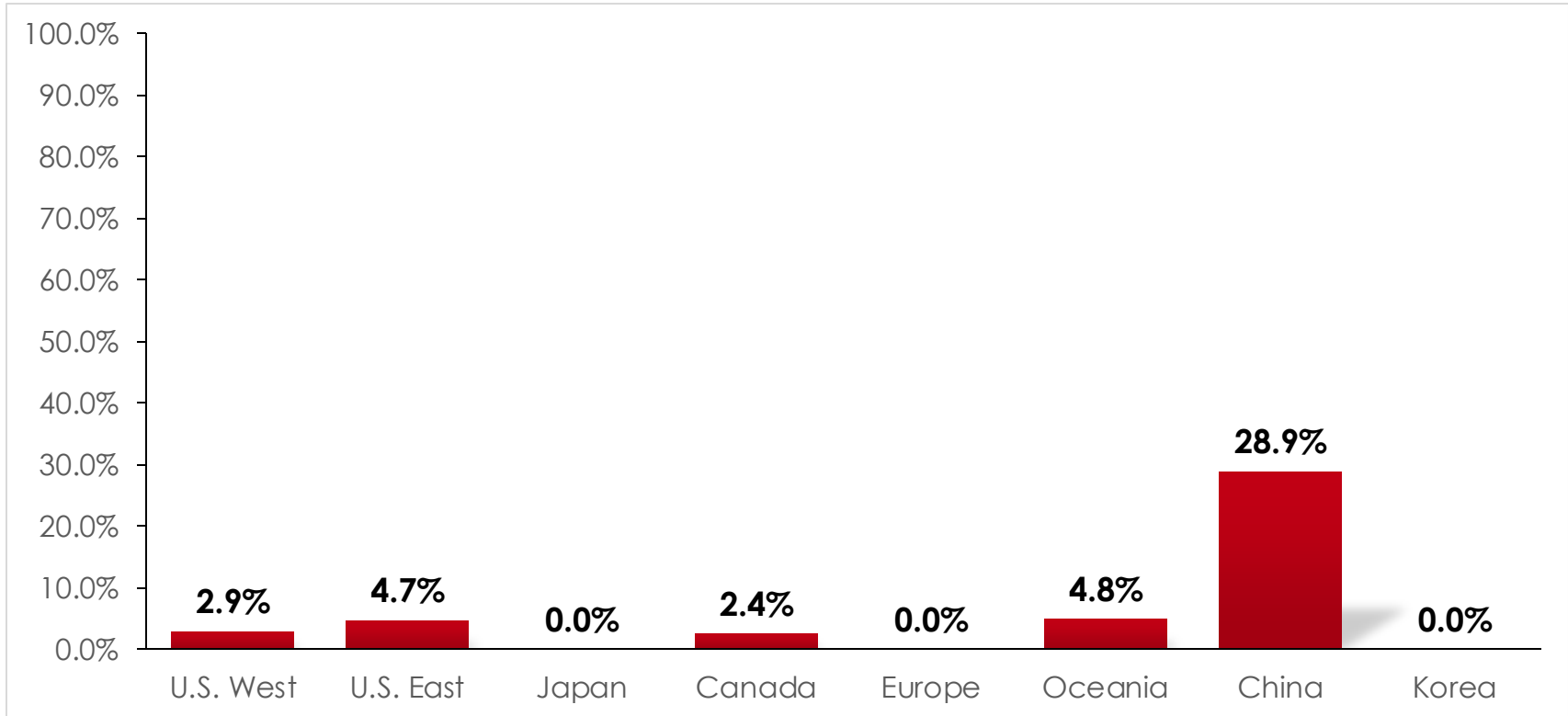
Sample sizes for Moloka'i are relatively small.

# IMPACT OF SOCIAL MEDIA POST/ VIDEO – MOLOKA‘I



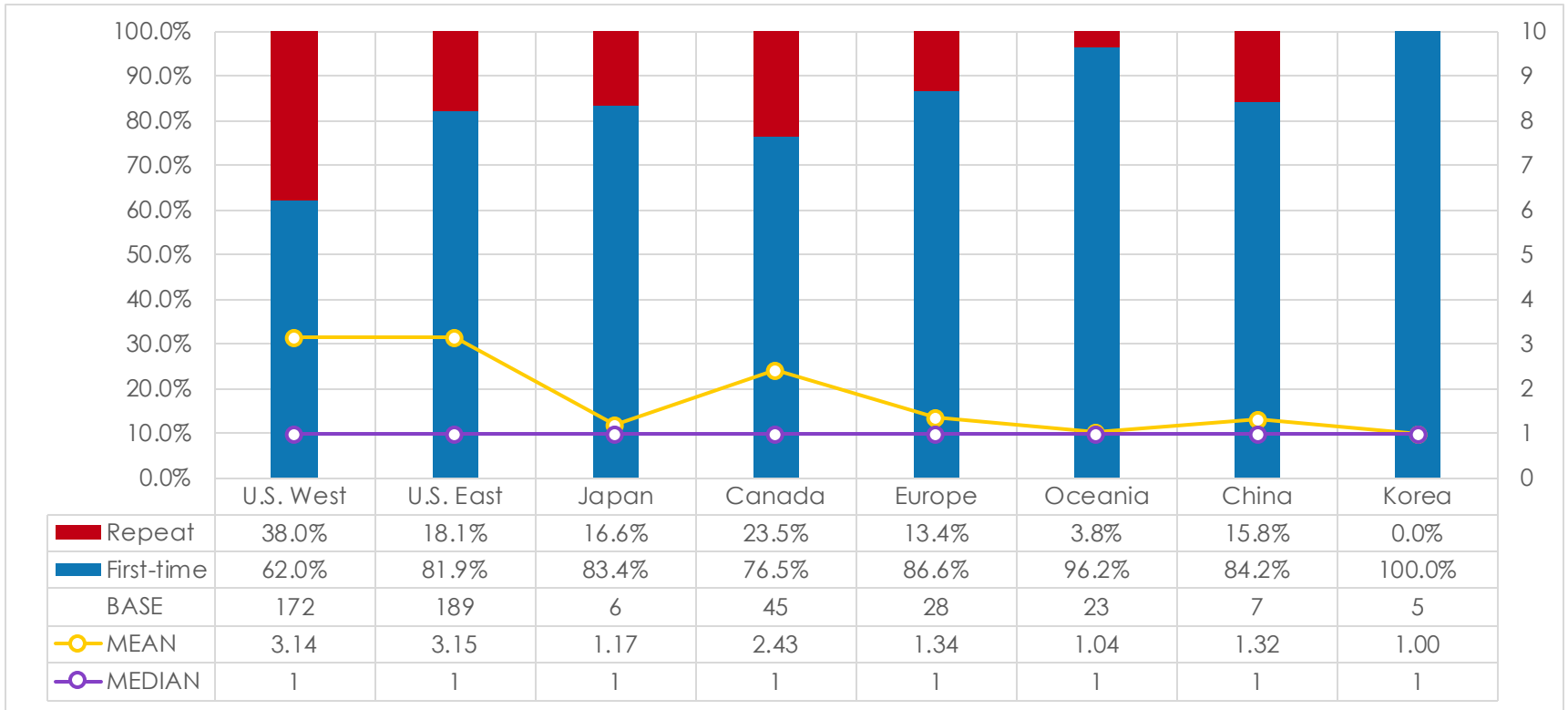
Sample sizes for Moloka'i are relatively small.

# IMPACT OF HAWAIIAN MUSIC – MOLOKA‘I



Sample sizes for Moloka'i are relatively small.

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – MOLOKA‘I



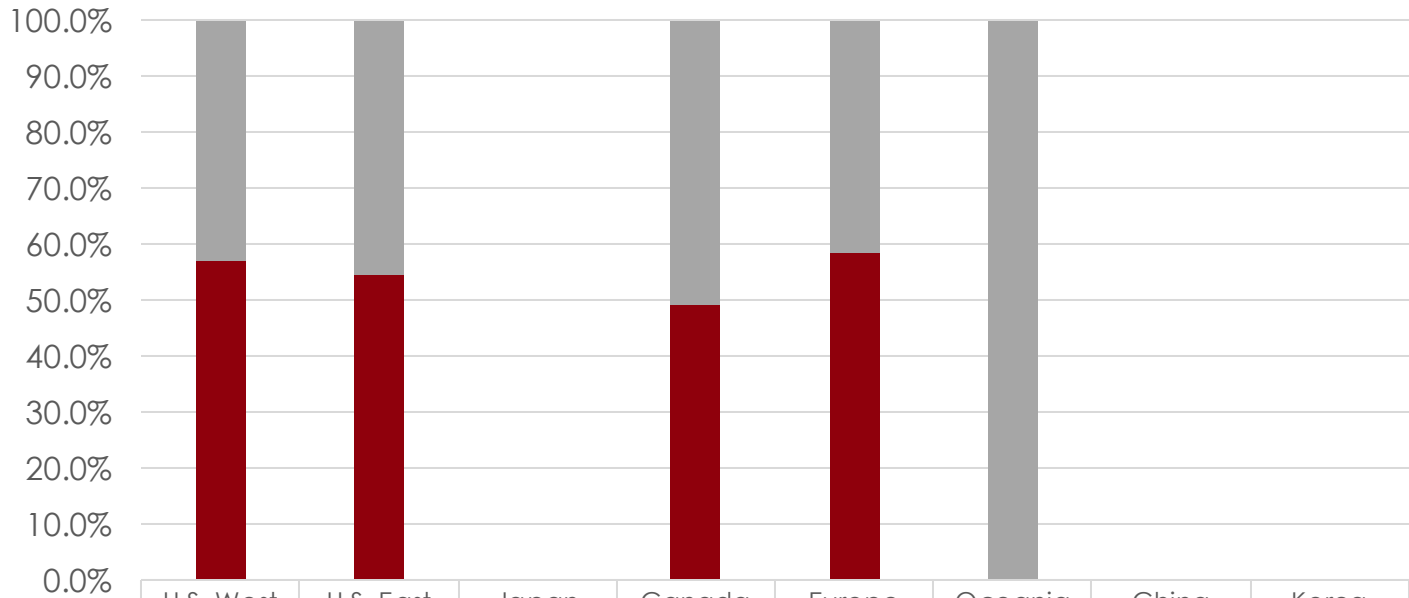
# ACCOMMODATIONS – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Vacation rental (includes AirBnB, VRBO, etc.)	21.5%	14.7%	0.0%	28.3%	13.8%	8.8%	0.0%	19.2%
Day trip/ Did not stay overnight	15.7%	21.0%	49.7%	16.4%	11.3%	7.7%	28.9%	38.5%
Cruise Ship	6.9%	31.2%	0.0%	29.0%	22.5%	60.8%	0.0%	0.0%
Condominium	21.6%	7.6%	16.6%	19.1%	17.2%	0.0%	13.2%	0.0%
Hotel	14.5%	16.7%	33.8%	6.7%	24.3%	17.7%	57.9%	42.3%
Friends or Relatives	16.3%	10.7%	0.0%	6.7%	7.1%	3.8%	0.0%	0.0%
Timeshare Unit	3.5%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rental House	5.8%	1.6%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%
Other (please specify)	3.5%	1.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%
Private Room in Private Home	2.3%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%
Camp Site, Beach	1.2%	1.1%	0.0%	0.0%	3.8%	5.0%	0.0%	0.0%

Sample sizes for Moloka‘i are relatively small.

# ACCOMMODATIONS - MOLOKA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Visitor area	42.8%	45.3%	0.0%	50.8%	41.4%	100.0%	0.0%	0.0%
■ Residential Neighborhood	57.2%	54.7%	0.0%	49.2%	58.6%	0.0%	0.0%	0.0%
BASE	49	31	0	12	5	2	0	0



# ACCOMMODATIONS - MOLOKAI'I

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Location</b>	45.0%	42.3%	0.0%	25.4%	19.5%	56.6%	0.0%	0.0%
<b>Price</b>	16.3%	35.4%	0.0%	23.8%	80.5%	0.0%	0.0%	0.0%
<b>Amenities like home (such as kitchen, gathering space, outdoor space, etc.)</b>	20.4%	12.8%	0.0%	33.9%	0.0%	43.4%	0.0%	0.0%
<b>Ability to have travel party members stay together</b>	10.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Did not choose/part of package</b>	4.1%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Owned by self, friend or relative</b>	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Recommendation</b>	0.0%	0.0%	0.0%	8.5%	0.0%	0.0%	0.0%	0.0%
<b>Previous experience</b>	0.0%	0.0%	0.0%	8.5%	0.0%	0.0%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	21.0%	27.2%	66.9%	31.4%	42.7%	30.4%	28.9%	42.3%
Local culture/ people/ music	18.6%	14.4%	16.6%	14.6%	10.9%	13.9%	42.1%	0.0%
Feeling of the “Aloha Spirit”	15.6%	8.9%	0.0%	16.2%	13.8%	3.8%	0.0%	0.0%
Beach/ ocean	13.4%	9.1%	16.6%	8.4%	7.1%	3.8%	13.2%	0.0%
Variety of activities/ attractions/ many choices	1.7%	13.6%	0.0%	12.8%	3.8%	18.9%	0.0%	57.7%
Overall customer service/ hospitality/ the people	5.8%	6.4%	0.0%	2.4%	10.9%	8.8%	0.0%	0.0%
Events/ celebrations with friends/ family	7.6%	2.2%	0.0%	2.4%	3.8%	0.0%	0.0%	0.0%
Activities/Attractions (not specified as part of a package)	2.9%	1.1%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka‘i are relatively small.

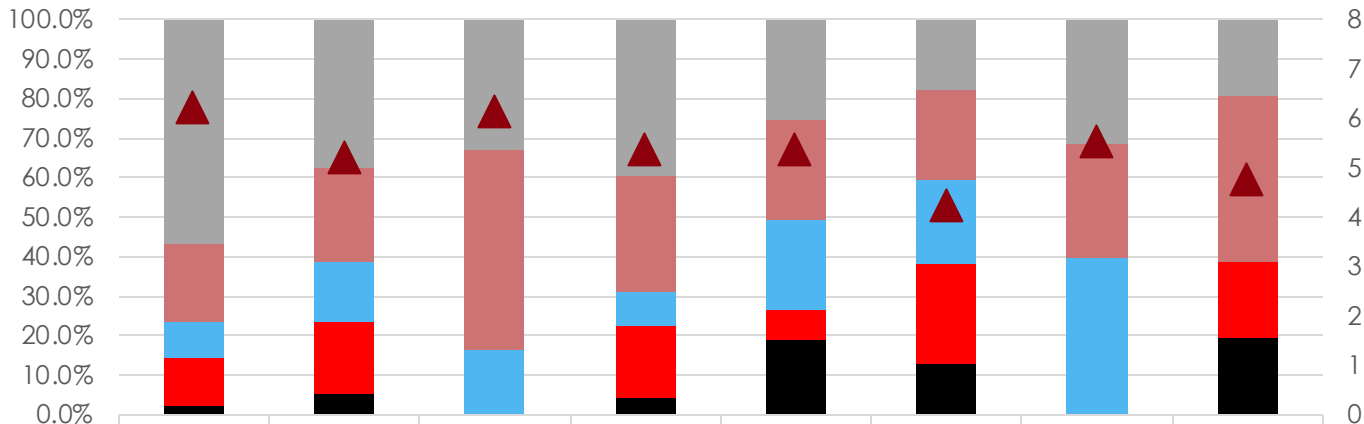
# AREAS OF OPPORTUNITIES – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	50.3%	59.8%	16.6%	43.7%	60.4%	59.6%	44.7%	38.5%
Food/ restaurant variety/ dining options	17.6%	13.3%	0.0%	16.6%	10.5%	5.0%	15.8%	19.2%
Would like to experience more local culture	5.2%	4.7%	16.6%	2.4%	7.4%	5.0%	0.0%	0.0%
Variety of activities/ attractions	5.8%	3.7%	0.0%	6.9%	3.5%	0.0%	0.0%	0.0%
Food/ restaurant quality	3.5%	2.8%	17.2%	0.0%	3.9%	5.0%	0.0%	23.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	3.5%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	2.4%	1.1%	16.6%	4.4%	3.5%	3.8%	0.0%	0.0%
Travel Problems (cost, airport, airline, TSA/customs, cruise)	2.4%	1.1%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka‘i are relatively small.

# LIKELIHOOD OF RETURN VISIT – MOLOKA‘I

8-pt Rating Scale  
8=V ery Likely / 1=V ery Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	56.7%	37.5%	33.1%	39.6%	25.3%	17.7%	31.5%	19.2%
■ Somewhat likely (5-6)	19.9%	23.8%	50.3%	29.4%	25.7%	22.7%	28.9%	42.3%
■ Somewhat unlikely (3-4)	9.3%	15.3%	16.6%	8.4%	22.6%	21.5%	39.5%	0.0%
■ Very unlikely (1-2)	11.8%	18.3%	0.0%	18.1%	7.4%	25.4%	0.0%	19.2%
■ Not sure	2.4%	5.0%	0.0%	4.4%	19.1%	12.7%	0.0%	19.2%
BASE	171	185	6	44	27	23	7	5
▲ MEAN	6.22	5.23	6.17	5.40	5.38	4.24	5.55	4.76

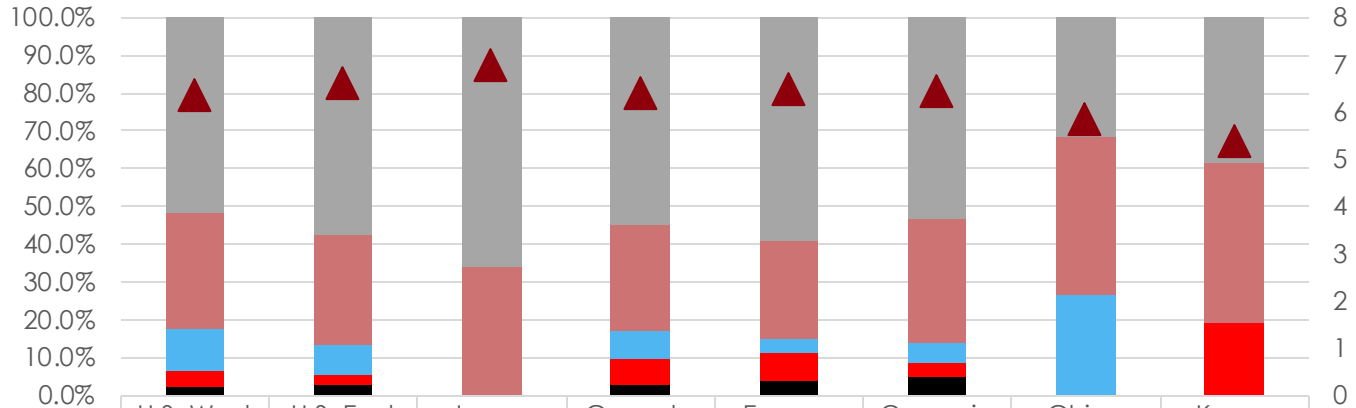
# REASONS FOR NOT RETURNING – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	49.8%	42.1%	100.0%	20.7%	23.0%	34.2%	33.3%	50.0%
No reason to return/ nothing new	25.0%	20.1%	0.0%	28.6%	22.2%	47.1%	0.0%	0.0%
Nothing to do/ boring	15.1%	7.0%	0.0%	22.2%	7.1%	0.0%	0.0%	50.0%
Too expensive/cost	4.9%	15.0%	0.0%	12.8%	7.9%	14.8%	100.0%	0.0%
Flight too long	2.4%	17.6%	0.0%	6.4%	38.9%	14.8%	0.0%	0.0%
Unfriendly people/ felt unwelcome	10.0%	7.0%	0.0%	22.2%	0.0%	0.0%	0.0%	0.0%
Not enough value for the price	5.0%	9.5%	0.0%	14.3%	0.0%	6.4%	0.0%	0.0%
Poor health/ age restriction	0.0%	8.3%	0.0%	0.0%	7.9%	14.8%	0.0%	0.0%
Inconvenient travel connections	5.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka‘i are relatively small.

# MOLOKA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	52.0%	57.8%	66.2%	54.8%	59.1%	53.1%	31.5%	38.5%
Somewhat likely (5-6)	30.4%	28.9%	33.8%	28.1%	26.1%	33.1%	42.1%	42.3%
Somewhat unlikely (3-4)	11.1%	7.7%	0.0%	7.5%	3.5%	5.0%	26.3%	0.0%
Very unlikely (1-2)	4.1%	2.6%	0.0%	7.0%	7.4%	3.8%	0.0%	19.2%
Not sure	2.4%	3.0%	0.0%	2.5%	3.9%	5.0%	0.0%	0.0%
BASE	171	185	6	43	27	23	7	5
MEAN	6.32	6.60	6.99	6.40	6.46	6.41	5.81	5.38

# MOLOKA'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.5%	94.7%	100.0%	95.4%	96.1%	91.2%	84.2%	100.0%
<b>On own (self-guided)</b>	78.8%	61.0%	49.7%	61.4%	65.3%	30.4%	15.8%	76.2%
<b>Helicopter/ airplane</b>	6.5%	10.3%	0.0%	9.7%	3.9%	8.8%	15.8%	28.5%
<b>Boat/ submarine/ whale</b>	13.5%	13.9%	16.6%	18.5%	3.5%	0.0%	26.3%	23.8%
<b>Visit towns</b>	52.1%	36.3%	83.4%	32.7%	33.5%	41.9%	13.2%	0.0%
<b>Limo/ van/ bus tour</b>	7.1%	20.2%	16.6%	11.3%	7.8%	26.5%	0.0%	0.0%
<b>Scenic views/ natural landmark</b>	52.6%	46.4%	49.7%	41.5%	47.4%	48.1%	39.5%	0.0%
<b>Movie/ TV/ film location</b>	0.0%	0.5%	0.0%	4.6%	7.4%	0.0%	0.0%	23.8%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.1%	82.1%	83.4%	90.3%	88.3%	71.9%	100.0%	100.0%
<b>Beach/ sunbathing</b>	66.9%	51.3%	33.1%	67.1%	66.5%	40.4%	55.3%	28.5%
<b>Bodyboard/ Standup paddle board</b>	10.1%	3.4%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%
<b>Surfing</b>	2.4%	1.1%	0.0%	0.0%	3.9%	0.0%	0.0%	23.8%
<b>Canoeing/ kayak</b>	11.9%	2.2%	0.0%	5.1%	11.3%	3.8%	31.5%	23.8%
<b>Swim- ocean</b>	46.7%	31.3%	0.0%	53.3%	36.6%	22.7%	15.8%	28.5%
<b>Snorkel</b>	30.2%	19.3%	0.0%	37.5%	25.7%	13.9%	28.9%	47.6%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.8%
<b>Scuba</b>	4.1%	2.8%	0.0%	0.0%	3.9%	0.0%	15.8%	0.0%
<b>Fishing</b>	5.9%	5.6%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	5.4%	1.6%	0.0%	2.6%	3.5%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.



# MOLOKA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.1%	82.1%	83.4%	90.3%	88.3%	71.9%	100.0%	100.0%
<b>Run/ Jog/ Fitness walk</b>	16.6%	8.4%	0.0%	17.9%	7.0%	13.9%	0.0%	0.0%
<b>Spa</b>	1.2%	2.9%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%
<b>Hiking</b>	47.3%	35.5%	0.0%	47.0%	29.2%	21.5%	15.8%	28.5%
<b>Backpack/Camping</b>	1.2%	1.7%	0.0%	0.0%	3.5%	5.0%	42.1%	0.0%
<b>Agritourism</b>	20.1%	9.1%	49.7%	14.8%	3.5%	5.0%	0.0%	23.8%
<b>Sport event/ tournament</b>	1.8%	0.5%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%
<b>Park/ botanical garden</b>	22.4%	25.4%	66.9%	16.9%	14.8%	23.9%	13.2%	0.0%
<b>Waterpark</b>	0.0%	0.5%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zip-lining</b>	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%
<b>All terrain vehicle (ATV)</b>	1.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Horseback riding</b>	1.2%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.

569 Q During this trip, which of the following activities did you participate in?

# MOLOKA'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.7%	82.6%	100.0%	86.1%	88.7%	83.5%	84.2%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	7.7%	10.3%	0.0%	24.2%	11.3%	15.0%	55.3%	71.5%
<b>Live music/ stage show</b>	21.8%	15.5%	0.0%	16.9%	18.3%	5.0%	15.8%	23.8%
<b>Nightclub/ dancing/ bar/ karaoke</b>	2.9%	3.9%	0.0%	0.0%	3.5%	0.0%	0.0%	28.5%
<b>Fine dining</b>	20.1%	14.4%	33.1%	27.6%	14.8%	5.0%	13.2%	28.5%
<b>Family restaurant</b>	50.4%	39.2%	0.0%	42.4%	26.1%	29.2%	0.0%	28.5%
<b>Fast food</b>	26.6%	21.0%	49.7%	25.0%	21.4%	11.5%	42.1%	23.8%
<b>Food truck</b>	21.3%	13.1%	16.6%	12.3%	7.4%	8.8%	26.3%	23.8%
<b>Café/ coffee house</b>	32.4%	24.7%	49.7%	25.0%	25.7%	43.1%	31.5%	23.8%
<b>Ethnic dining</b>	11.2%	12.0%	17.2%	10.2%	7.4%	3.8%	13.2%	23.8%
<b>Prepared own meal</b>	58.7%	35.4%	16.6%	59.8%	40.5%	26.5%	28.9%	0.0%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	85.8%	78.8%	100.0%	84.1%	84.8%	83.5%	68.5%	52.4%
<b>Mall/ department store</b>	1.2%	5.3%	0.0%	15.9%	0.0%	27.7%	0.0%	52.4%
<b>Designer boutique</b>	0.6%	3.2%	0.0%	5.1%	0.0%	8.8%	0.0%	0.0%
<b>Hotel/ resort store</b>	7.0%	7.4%	0.0%	13.9%	0.0%	5.0%	0.0%	23.8%
<b>Swap meet/ flea market</b>	10.1%	8.4%	0.0%	9.7%	0.0%	0.0%	13.2%	0.0%
<b>Discount/ outlet store</b>	1.8%	2.1%	0.0%	2.1%	3.9%	13.9%	0.0%	28.5%
<b>Supermarket</b>	52.1%	33.9%	49.7%	42.9%	50.9%	41.6%	26.3%	52.4%
<b>Farmer's market</b>	45.6%	23.3%	0.0%	42.4%	25.7%	15.0%	13.2%	0.0%
<b>Convenience store</b>	28.3%	18.1%	0.0%	34.8%	14.8%	30.4%	42.1%	52.4%
<b>Duty free store</b>	1.2%	1.6%	33.8%	2.6%	0.0%	0.0%	13.2%	28.5%
<b>Local shop/ artisan</b>	59.1%	54.8%	33.1%	57.9%	39.6%	44.2%	26.3%	23.8%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	73.3%	69.2%	66.9%	59.5%	43.9%	70.8%	68.5%	76.2%
<b>Historic military site</b>	3.6%	8.0%	0.0%	11.3%	7.4%	8.8%	42.1%	28.5%
<b>Other historical site</b>	53.2%	46.2%	33.1%	34.3%	25.3%	27.7%	26.3%	23.8%
<b>Museum/ art gallery</b>	13.0%	11.0%	0.0%	9.7%	11.3%	29.2%	13.2%	52.4%
<b>Luau/ Polynesian show/ hula show</b>	4.7%	12.6%	17.2%	18.5%	3.9%	18.9%	0.0%	52.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	3.6%	3.2%	0.0%	7.2%	0.0%	0.0%	0.0%	23.8%
<b>Play/ concert/ theatre</b>	1.8%	1.1%	0.0%	2.1%	3.9%	3.8%	28.9%	0.0%
<b>Art/ craft fair</b>	13.6%	7.2%	0.0%	14.4%	0.0%	18.9%	42.1%	0.0%
<b>Festival event</b>	9.4%	7.7%	33.1%	4.6%	0.0%	3.8%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	75.7%	79.5%	100.0%	88.2%	88.7%	83.5%	68.5%	76.2%
<b>Airport shuttle</b>	8.2%	6.5%	0.0%	11.3%	3.5%	8.8%	0.0%	0.0%
<b>Trolley</b>	0.0%	1.7%	0.0%	4.6%	0.0%	7.7%	13.2%	0.0%
<b>Public bus</b>	0.6%	3.3%	0.0%	6.7%	7.4%	8.8%	26.3%	0.0%
<b>Tour bus/ tour van</b>	10.0%	22.9%	66.9%	20.1%	11.7%	40.4%	26.3%	47.6%
<b>Taxi/ limo</b>	5.9%	5.4%	0.0%	16.4%	11.7%	10.0%	13.2%	23.8%
<b>Rental car</b>	59.7%	46.9%	50.3%	57.3%	57.5%	30.4%	15.8%	28.5%
<b>Ride share</b>	2.3%	3.6%	0.0%	4.1%	3.9%	0.0%	0.0%	0.0%
<b>Bicycle rental</b>	2.4%	0.5%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.

## MOLOKA'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	29.6%	18.7%	0.0%	20.6%	18.7%	3.8%	28.9%	28.5%
Visit friends/ family	29.0%	17.6%	0.0%	18.5%	14.8%	3.8%	28.9%	28.5%
Volunteer- non-profit	0.6%	1.1%	0.0%	2.1%	3.9%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I - ACTIVITIES – ATTRACTIONS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Ali'i Fishpond</b>	18.3%	9.5%	33.1%	5.1%	3.5%	3.8%	57.9%	28.5%
<b>Halawa Beach Park</b>	40.7%	25.3%	49.7%	40.4%	43.1%	27.7%	44.7%	23.8%
<b>Halawa Valley</b>	37.2%	25.7%	66.9%	37.3%	37.0%	22.7%	13.2%	0.0%
<b>Kalaupapa National Historic Park</b>	28.3%	31.2%	17.2%	21.1%	10.9%	21.5%	44.7%	23.8%
<b>Kamakou</b>	4.2%	4.4%	0.0%	5.1%	14.8%	0.0%	15.8%	28.5%
<b>Kauaiwa Coconut Grove</b>	16.0%	10.9%	33.1%	15.3%	14.8%	7.7%	0.0%	23.8%
<b>Kapukahehu Beach</b>	33.8%	20.7%	16.6%	19.9%	32.7%	17.7%	0.0%	0.0%
<b>Kumimi Beach Park</b>	33.7%	20.1%	17.2%	38.3%	25.3%	13.9%	0.0%	23.8%

Sample sizes for Moloka'i are relatively small.

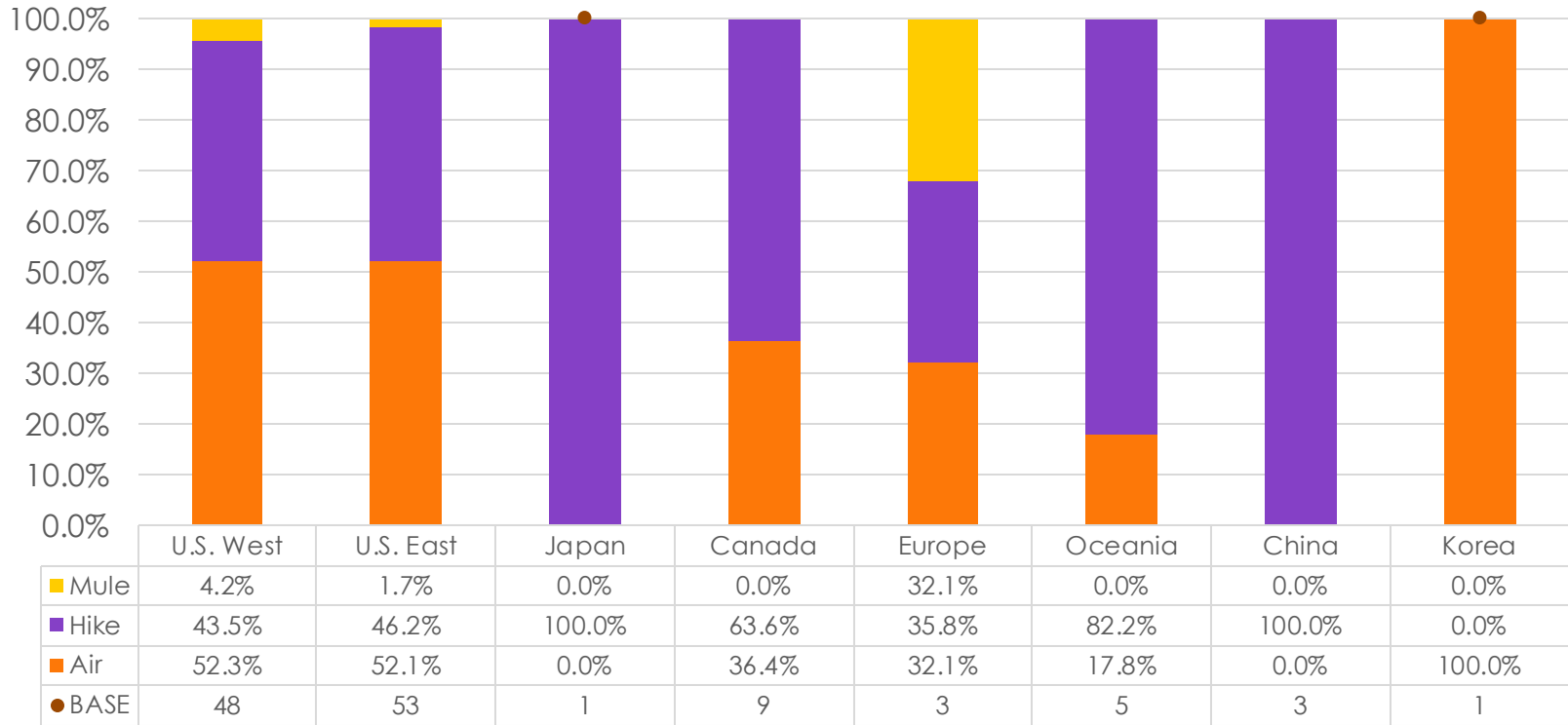
# MOLOKA'I - ACTIVITIES – ATTRACTIONS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Moloka'i Mule Ride</b>	1.8%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Moloka'i Museum &amp; Cultural Center</b>	11.3%	10.3%	33.1%	17.4%	10.9%	21.5%	13.2%	52.4%
<b>Olo'upena Falls</b>	11.2%	7.0%	33.8%	11.3%	11.3%	17.7%	47.3%	23.8%
<b>One Ali'i Beach Park</b>	13.6%	15.3%	33.1%	22.5%	10.9%	18.9%	57.9%	0.0%
<b>Pala'au State Park</b>	23.7%	20.6%	33.1%	15.3%	25.7%	17.7%	15.8%	0.0%
<b>Papohaku Beach</b>	44.4%	33.0%	83.4%	32.7%	43.1%	22.7%	39.5%	0.0%
<b>Wailau Valley</b>	13.6%	14.8%	16.6%	12.3%	25.7%	13.9%	26.3%	0.0%

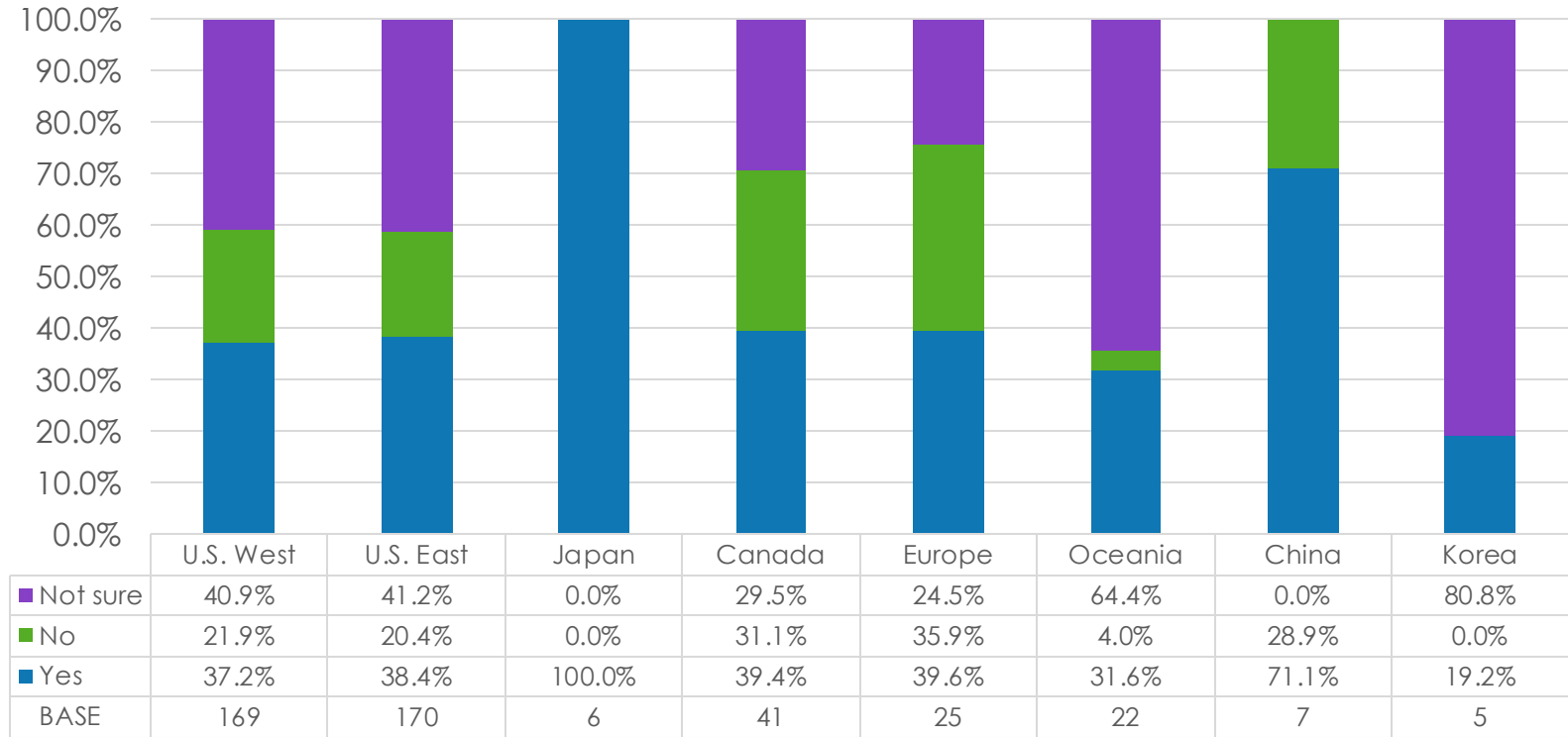
Sample sizes for Moloka'i are relatively small.



# KALAUPAPA NATIONAL HISTORICAL PARK - EXPERIENCE

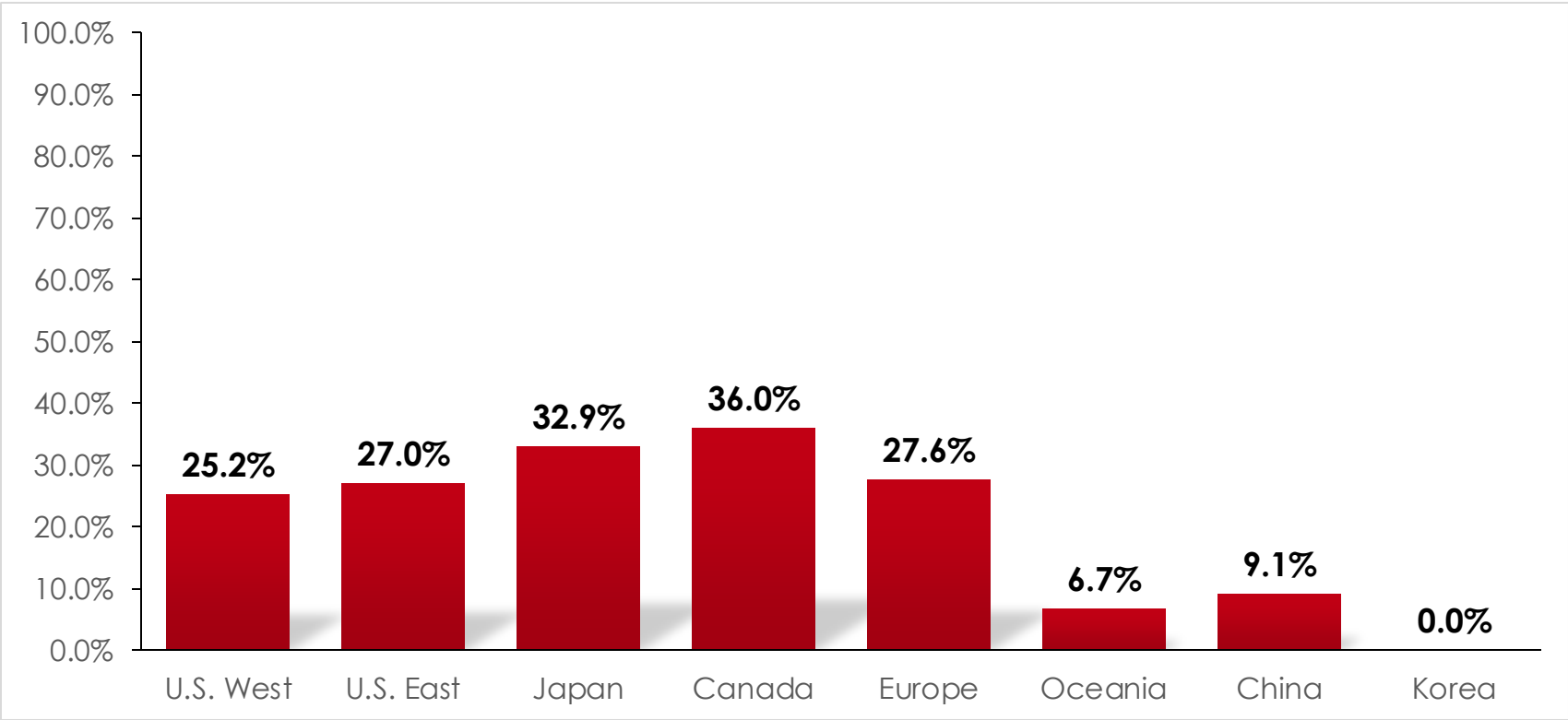


# AIRPORT VISITORS CENTER



# SECTION – ISLAND OF LANA'I

# AIDED ADVERTISING AWARENESS – LANA'I

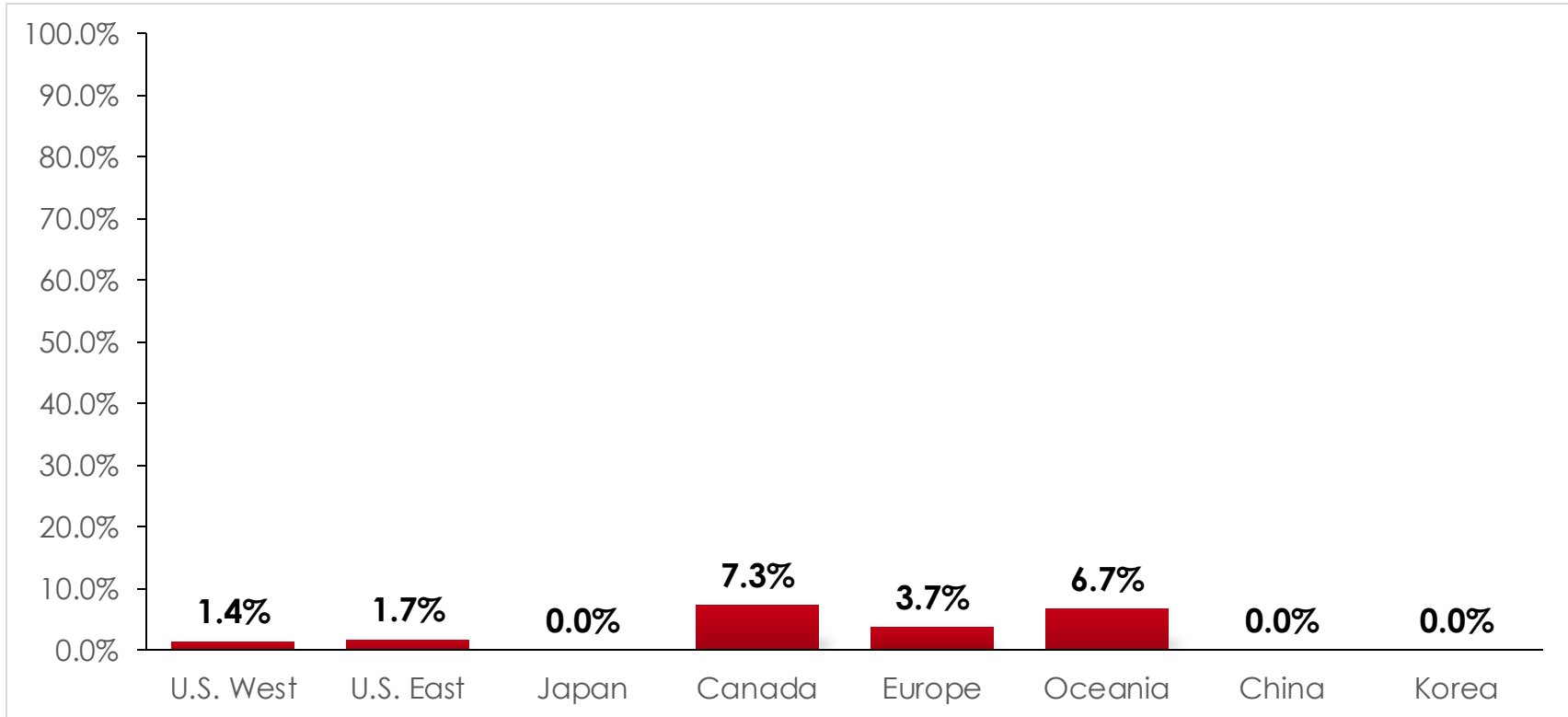


Sample sizes for Lana'i are relatively small.

580 Q. Do you remember seeing or hearing advertising for the Lana'i prior to your arrival?

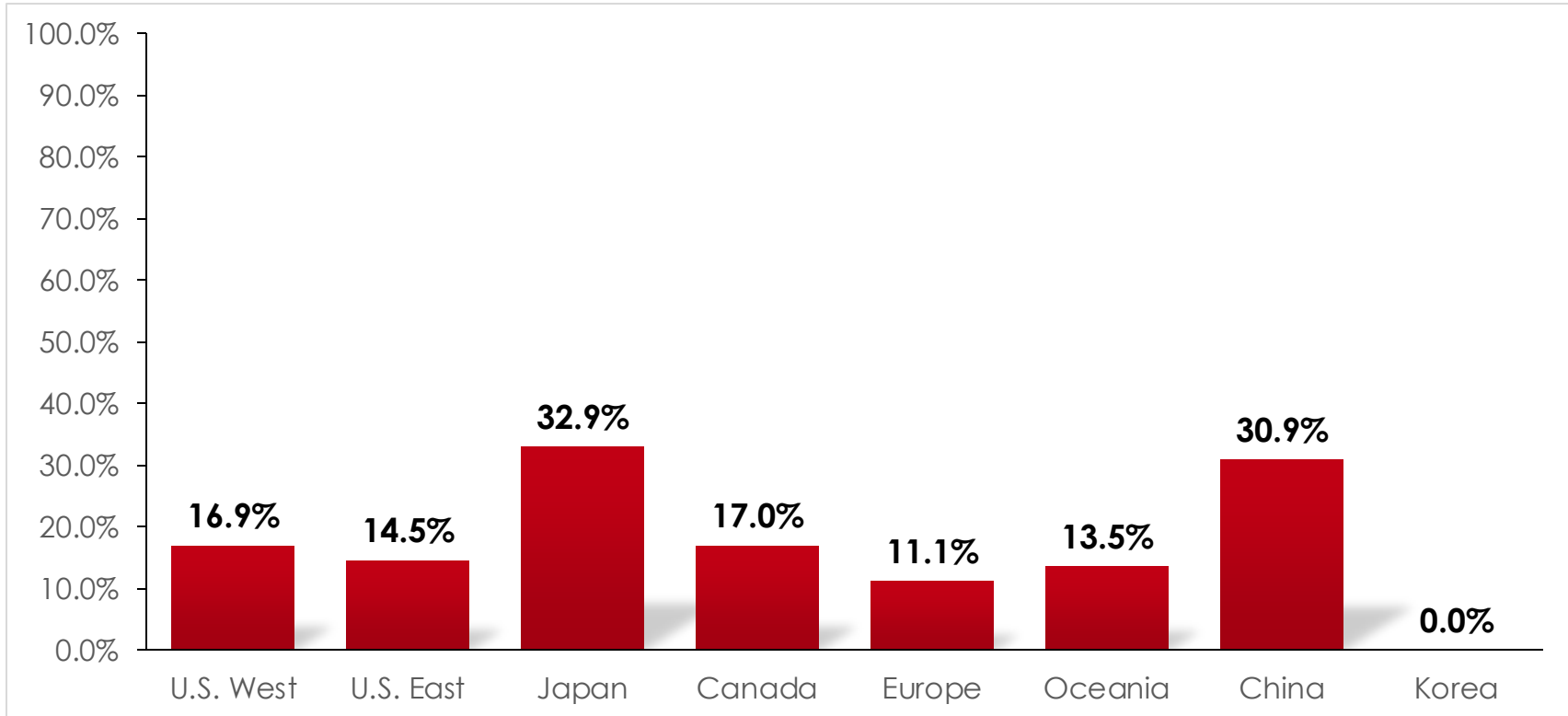


# IMPACT OF LOCATION FILMING—LANAI



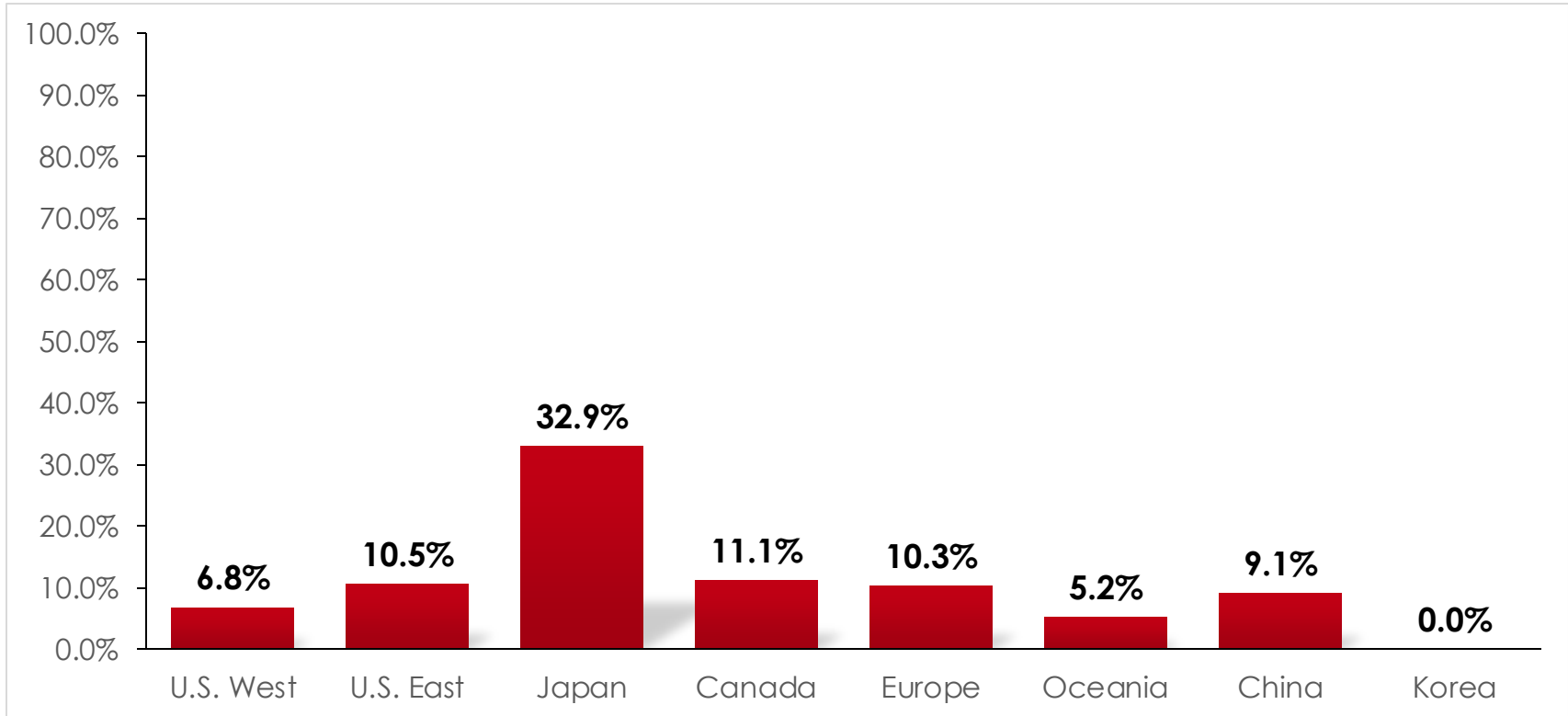
Sample sizes for Lanai are relatively small.

# IMPACT OF OUTDOOR/ SPORTING EVENT – LANAI'I



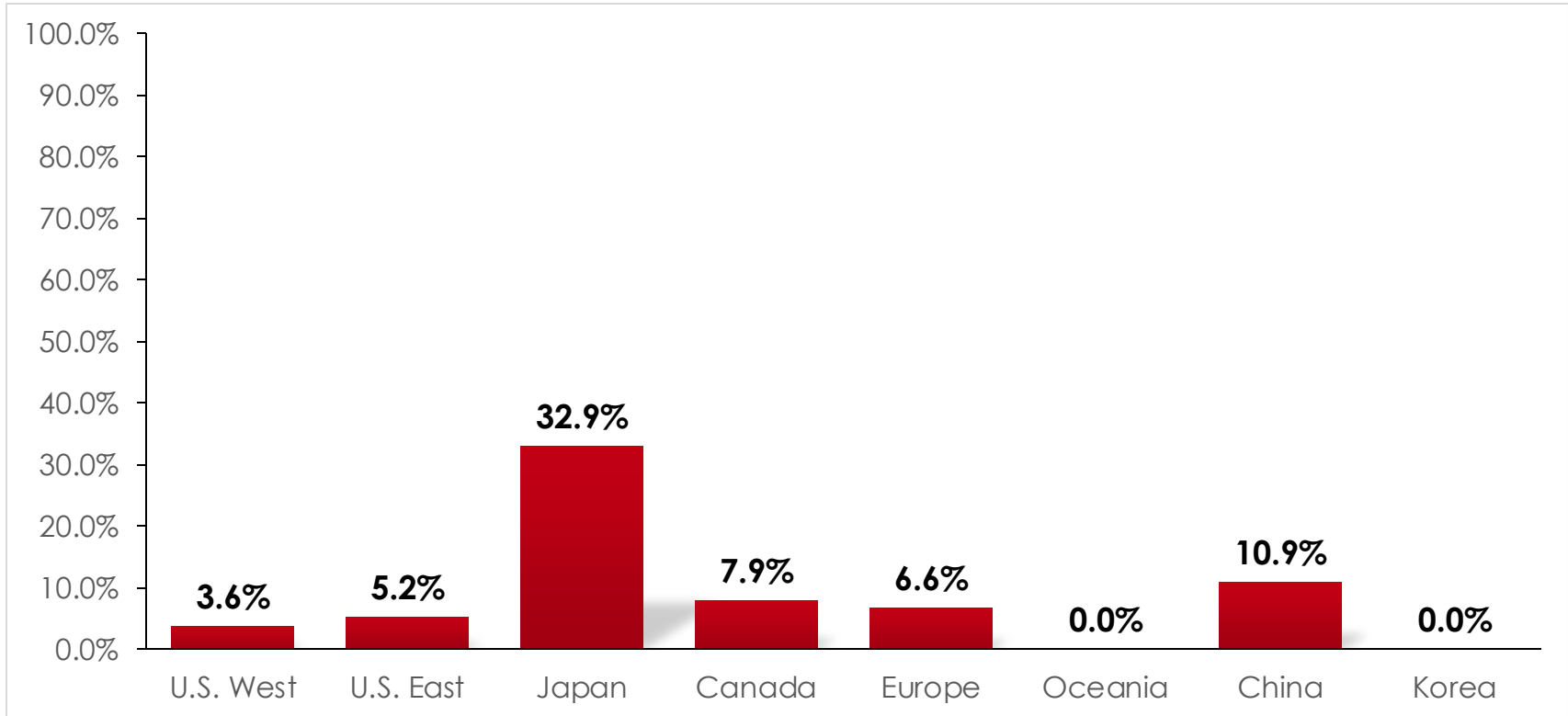
Sample sizes for Lanai'i are relatively small.

# IMPACT OF SOCIAL MEDIA POST/ VIDEO– LANAI‘I



Sample sizes for Lāna‘i are relatively small.

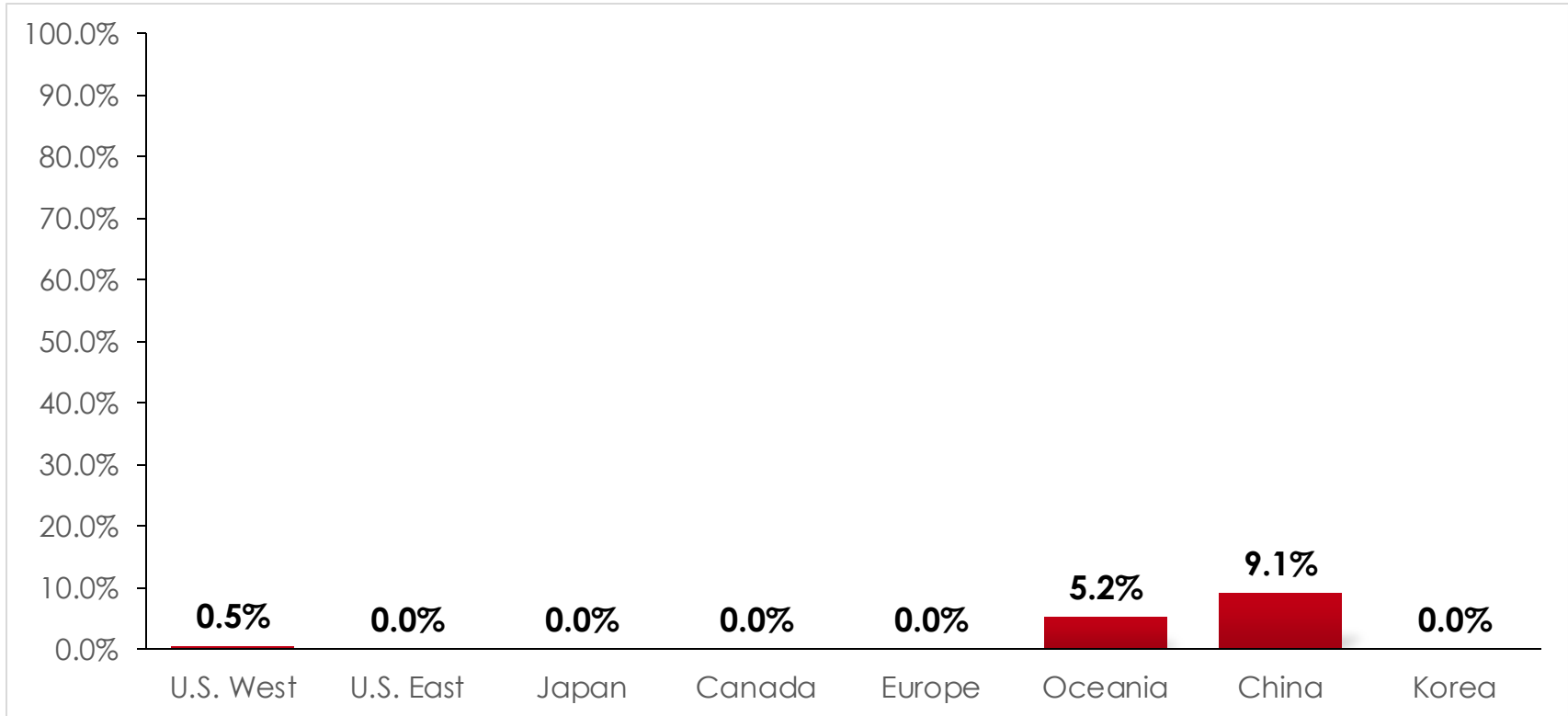
# IMPACT OF HAWAIIAN CULTURAL EVENT – LANAI 'I



Sample sizes for Lāna'i are relatively small.

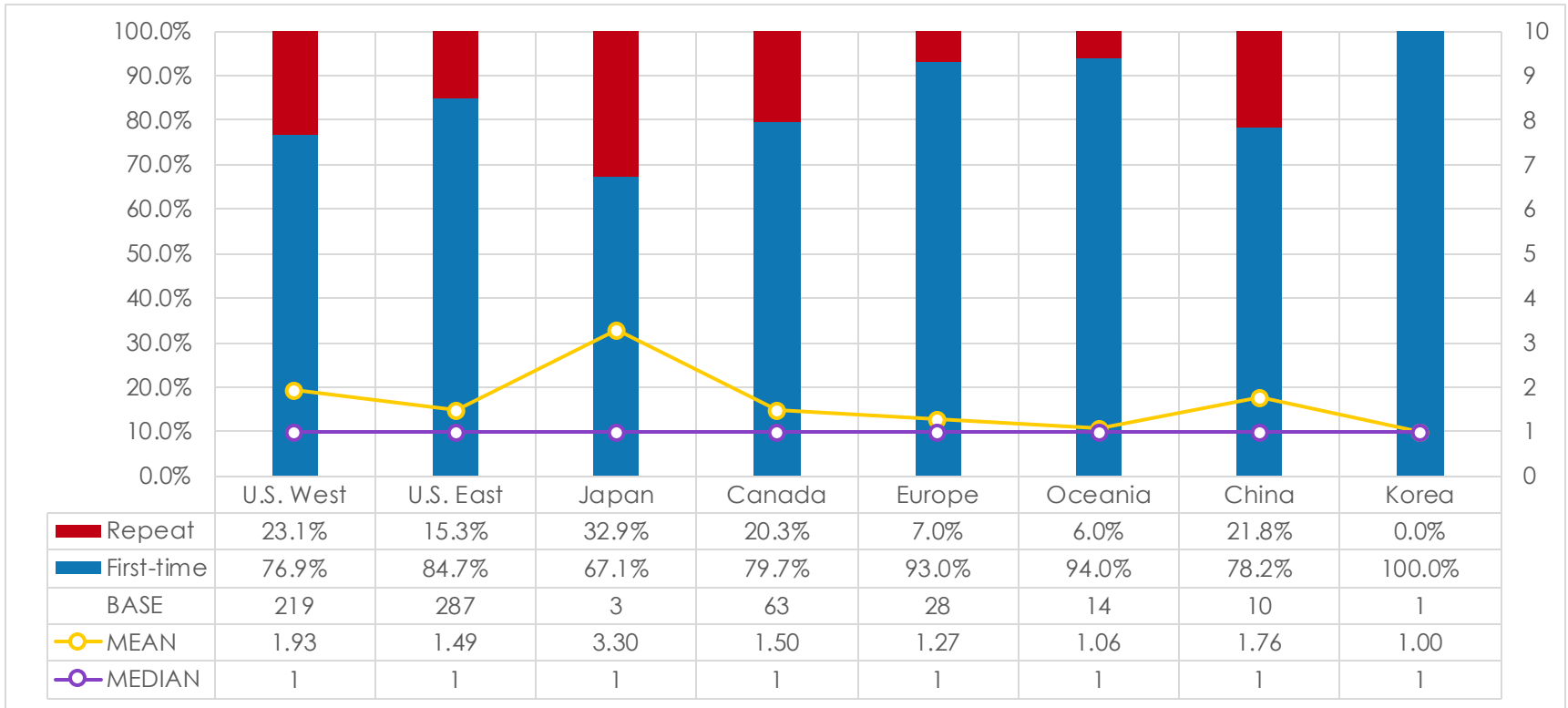


# IMPACT OF HAWAIIAN MUSIC – LANAI



Sample sizes for Lanai are relatively small.

# 1<sup>ST</sup> TIME VS REPEAT VISITOR –LANA'I



# ACCOMMODATIONS – LANANA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Day trip/ Did not stay overnight	57.2%	52.7%	0.0%	68.7%	49.4%	21.6%	27.3%	0.0%
Hotel	24.6%	26.1%	100.0%	12.3%	10.3%	19.7%	29.1%	100.0%
Cruise Ship	8.1%	17.4%	0.0%	15.5%	40.7%	58.7%	10.9%	0.0%
Friends or Relatives	5.4%	3.7%	32.9%	3.2%	0.0%	0.0%	0.0%	0.0%
Vacation rental (includes AirBnB, VRBO, etc.)	1.8%	0.4%	0.0%	1.4%	0.0%	0.0%	10.9%	0.0%
Camp Site, Beach	1.4%	0.7%	0.0%	1.7%	0.0%	0.0%	21.8%	0.0%
Rental House	1.4%	0.4%	0.0%	0.0%	0.0%	0.0%	21.8%	0.0%

Sample sizes for Lanana'i are relatively small.

# STRENGTHS/ POSITIVE ASPECTS – LANA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Beach/ ocean	21.0%	18.2%	32.9%	27.5%	17.3%	7.8%	20.0%	0.0%
Nature/ natural beauty/ scenery	16.9%	20.7%	34.2%	16.9%	32.5%	13.8%	9.1%	0.0%
Overall customer service/ hospitality/ the people	13.2%	14.0%	32.9%	10.0%	7.4%	13.8%	0.0%	0.0%
Variety of activities/ attractions/ many choices	4.6%	9.9%	0.0%	11.1%	11.1%	23.4%	10.9%	0.0%
Local culture/ people/ music	7.2%	6.0%	0.0%	1.8%	10.7%	13.8%	20.0%	0.0%
Feeling of the “Aloha Spirit”	5.9%	6.6%	0.0%	8.2%	13.6%	12.0%	0.0%	0.0%
Location	6.8%	5.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%
Accommodations/ was as promised	5.4%	4.0%	0.0%	0.0%	0.0%	7.8%	10.9%	100.0%

Sample sizes for Lāna‘i are relatively small.

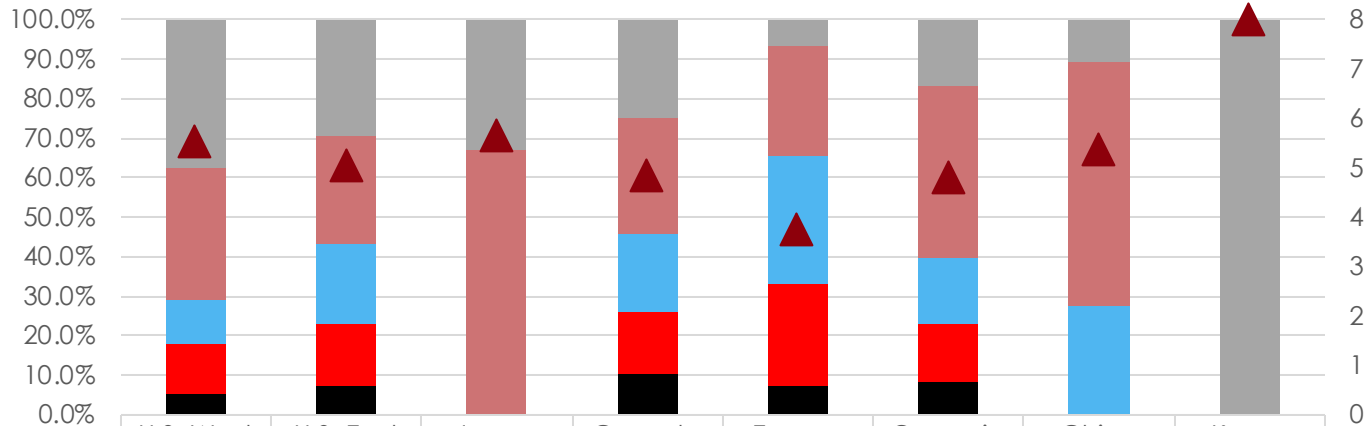
# AREAS OF OPPORTUNITIES – LANA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	57.5%	70.3%	65.8%	70.7%	75.3%	83.4%	21.8%	100.0%
Food/ restaurant variety/ dining options	10.0%	5.5%	0.0%	3.2%	0.0%	0.0%	20.0%	0.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	7.7%	5.4%	0.0%	5.3%	3.3%	0.0%	10.9%	0.0%
Variety of activities/ attractions	5.5%	7.0%	34.2%	2.9%	14.4%	8.3%	0.0%	0.0%
Would like to experience more local culture	5.1%	2.9%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%
Cost/Expensive (specific/non-specific)	3.2%	2.5%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%

Sample sizes for Lāna'i are relatively small.

# LIKELIHOOD OF RETURN VISIT – LANAI

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	37.5%	29.5%	32.9%	25.1%	6.6%	16.6%	10.9%	100.0%
■ Somewhat likely (5-6)	33.8%	27.6%	67.1%	29.1%	28.0%	43.9%	61.8%	0.0%
■ Somewhat unlikely (3-4)	10.9%	20.3%	0.0%	19.6%	32.5%	16.6%	27.3%	0.0%
■ Very unlikely (1-2)	12.8%	15.7%	0.0%	16.0%	25.5%	14.6%	0.0%	0.0%
■ Not sure	5.1%	7.0%	0.0%	10.2%	7.4%	8.3%	0.0%	0.0%
BASE	219	283	3	61	28	13	10	1
▲ MEAN	5.56	5.05	5.66	4.86	3.76	4.81	5.38	8.00

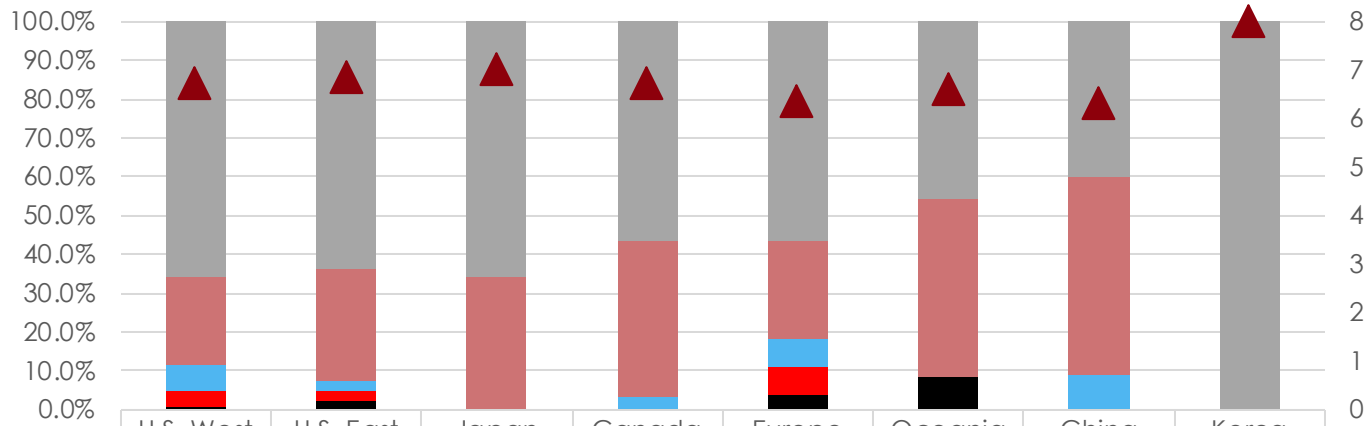
# REASONS FOR NOT RETURNING – LANA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	40.4%	39.0%	0.0%	46.8%	16.4%	58.0%	0.0%	0.0%
No reason to return/ nothing new	25.6%	19.8%	0.0%	21.4%	11.3%	0.0%	0.0%	0.0%
Too expensive/cost	19.3%	23.1%	0.0%	14.3%	11.3%	21.0%	0.0%	0.0%
Nothing to do/ boring	17.6%	2.5%	0.0%	7.9%	21.4%	0.0%	66.7%	0.0%
Flight too long	1.6%	17.0%	0.0%	17.5%	39.6%	0.0%	0.0%	0.0%
Not enough value for the price	17.8%	3.8%	0.0%	0.0%	0.0%	0.0%	33.3%	0.0%
Other financial obligations	3.2%	8.3%	0.0%	9.6%	5.7%	0.0%	0.0%	0.0%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	8.2%	3.4%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%
Poor health/ age restriction	1.6%	5.1%	0.0%	3.2%	5.7%	21.0%	0.0%	0.0%
Unfriendly people/ felt unwelcome	3.2%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are relatively small.

# LANA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	65.6%	63.9%	65.8%	56.8%	56.8%	45.9%	40.0%	100.0%
■ Somewhat likely (5-6)	22.9%	28.4%	34.2%	39.9%	25.1%	45.9%	50.9%	0.0%
■ Somewhat unlikely (3-4)	6.4%	2.8%	0.0%	3.3%	7.0%	0.0%	9.1%	0.0%
■ Very unlikely (1-2)	4.1%	2.4%	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%
■ Not sure	0.9%	2.4%	0.0%	0.0%	3.7%	8.3%	0.0%	0.0%
BASE	218	282	3	60	28	13	10	1
▲ MEAN	6.70	6.83	6.99	6.73	6.32	6.57	6.31	8.00



## LANA'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.1%	93.2%	100.0%	86.4%	96.7%	75.1%	90.9%	0.0%
<b>On own (self-guided)</b>	39.5%	32.4%	0.0%	37.7%	32.5%	21.0%	30.9%	0.0%
<b>Helicopter/ airplane</b>	0.9%	2.5%	0.0%	3.0%	0.0%	0.0%	30.9%	0.0%
<b>Boat/ submarine/ whale</b>	23.4%	32.0%	0.0%	22.9%	24.7%	16.6%	18.2%	0.0%
<b>Visit towns</b>	36.3%	34.9%	100.0%	19.1%	28.0%	6.4%	9.1%	0.0%
<b>Limo/ van/ bus tour</b>	17.5%	22.6%	0.0%	10.0%	32.1%	39.5%	30.9%	0.0%
<b>Scenic views/ natural landmark</b>	34.8%	40.1%	32.9%	32.1%	28.0%	27.4%	40.0%	0.0%
<b>Movie/ TV/ film location</b>	0.9%	0.3%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%

Sample sizes for Lānaʻi are relatively small.

# LANA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.5%	88.0%	100.0%	86.7%	75.7%	77.1%	89.1%	100.0%
<b>Beach/ sunbathing</b>	61.9%	60.7%	32.9%	65.3%	60.9%	37.6%	78.2%	100.0%
<b>Bodyboard/ Standup paddle board</b>	1.4%	2.5%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%
<b>Surfing</b>	1.4%	0.4%	0.0%	1.5%	0.0%	0.0%	20.0%	0.0%
<b>Canoeing/ kayak</b>	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%
<b>Swim- ocean</b>	44.6%	43.3%	100.0%	42.5%	28.4%	29.3%	20.0%	100.0%
<b>Snorkel</b>	41.3%	42.3%	0.0%	39.9%	32.1%	14.6%	18.2%	0.0%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	5.1%	2.5%	0.0%	1.5%	0.0%	0.0%	9.1%	0.0%
<b>Fishing</b>	2.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	7.3%	7.7%	0.0%	7.0%	0.0%	8.3%	0.0%	0.0%

Sample sizes for Lāna'i are relatively small.

# LANA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.5%	88.0%	100.0%	86.7%	75.7%	77.1%	89.1%	100.0%
<b>Run/ Jog/ Fitness walk</b>	9.2%	8.0%	0.0%	3.0%	7.0%	0.0%	9.1%	0.0%
<b>Spa</b>	10.1%	12.0%	32.9%	1.5%	0.0%	0.0%	0.0%	0.0%
<b>Hiking</b>	34.9%	28.1%	32.9%	21.8%	7.0%	14.6%	21.8%	0.0%
<b>Backpack/Camping</b>	0.9%	1.1%	0.0%	0.0%	0.0%	0.0%	30.9%	0.0%
<b>Agritourism</b>	6.0%	6.8%	34.2%	5.2%	3.3%	0.0%	10.9%	0.0%
<b>Sport event/ tournament</b>	2.3%	1.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%
<b>Park/ botanical garden</b>	11.9%	12.5%	34.2%	10.3%	18.1%	0.0%	0.0%	0.0%
<b>Waterpark</b>	0.5%	0.4%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zip-lining</b>	0.9%	0.8%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%
<b>Skydiving</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	5.5%	5.0%	0.0%	4.8%	3.3%	6.4%	0.0%	100.0%
<b>Horseback riding</b>	1.8%	4.3%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%

# LANA'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	79.4%	81.0%	100.0%	76.7%	81.9%	85.4%	80.0%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	21.7%	31.2%	32.9%	21.8%	28.8%	8.3%	32.7%	100.0%
<b>Live music/ stage show</b>	6.4%	6.9%	0.0%	0.0%	7.0%	6.4%	9.1%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	2.3%	1.4%	0.0%	1.5%	0.0%	8.3%	0.0%	0.0%
<b>Fine dining</b>	27.6%	26.8%	100.0%	15.5%	17.3%	29.3%	9.1%	0.0%
<b>Family restaurant</b>	23.4%	18.8%	0.0%	6.0%	21.0%	8.3%	9.1%	0.0%
<b>Fast food</b>	6.0%	3.3%	0.0%	8.1%	3.7%	8.3%	20.0%	0.0%
<b>Food truck</b>	1.4%	2.1%	0.0%	0.0%	7.0%	0.0%	52.7%	0.0%
<b>Café/ coffee house</b>	17.4%	14.1%	65.8%	21.4%	17.7%	45.9%	60.0%	0.0%
<b>Ethnic dining</b>	3.7%	5.8%	0.0%	5.2%	3.3%	0.0%	0.0%	0.0%
<b>Prepared own meal</b>	16.9%	8.6%	0.0%	15.1%	14.8%	8.3%	9.1%	0.0%

Sample sizes for Lāna'i are relatively small.

# LANA'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	60.2%	62.4%	67.1%	45.0%	53.5%	68.8%	80.0%	100.0%
<b>Mall/ department store</b>	3.2%	1.7%	0.0%	3.3%	11.1%	16.6%	0.0%	0.0%
<b>Designer boutique</b>	5.1%	4.0%	0.0%	4.5%	0.0%	0.0%	41.8%	0.0%
<b>Hotel/ resort store</b>	11.5%	16.7%	0.0%	7.8%	3.3%	8.3%	30.9%	100.0%
<b>Swap meet/ flea market</b>	1.4%	1.4%	0.0%	1.5%	0.0%	8.3%	9.1%	0.0%
<b>Discount/ outlet store</b>	0.0%	1.4%	0.0%	3.3%	3.7%	8.3%	0.0%	0.0%
<b>Supermarket</b>	18.4%	12.0%	32.9%	6.3%	14.4%	8.3%	18.2%	0.0%
<b>Farmer's market</b>	4.1%	4.7%	0.0%	0.0%	7.0%	8.3%	10.9%	0.0%
<b>Convenience store</b>	14.7%	15.1%	0.0%	8.5%	21.4%	8.3%	40.0%	0.0%
<b>Duty free store</b>	1.4%	2.1%	34.2%	3.7%	3.7%	8.3%	41.8%	0.0%
<b>Local shop/ artisan</b>	34.8%	34.6%	0.0%	25.4%	24.3%	52.2%	10.9%	0.0%

Sample sizes for Lāna'i are relatively small.

# LANA'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	39.5%	42.5%	32.9%	41.4%	53.1%	31.2%	70.9%	0.0%
<b>Historic military site</b>	1.8%	4.9%	0.0%	7.8%	10.7%	16.6%	32.7%	0.0%
<b>Other historical site</b>	17.1%	20.2%	32.9%	22.1%	11.1%	14.6%	29.1%	0.0%
<b>Museum/ art gallery</b>	13.8%	12.8%	0.0%	11.5%	10.3%	8.3%	9.1%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	3.6%	7.7%	32.9%	4.5%	17.7%	0.0%	0.0%	0.0%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	2.3%	1.8%	32.9%	0.0%	10.7%	0.0%	20.0%	0.0%
<b>Play/ concert/ theatre</b>	0.5%	1.4%	0.0%	1.8%	0.0%	0.0%	41.8%	0.0%
<b>Art/ craft fair</b>	1.4%	2.5%	0.0%	0.0%	0.0%	0.0%	43.6%	0.0%
<b>Festival event</b>	6.9%	3.0%	0.0%	5.2%	6.6%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are relatively small.

# LANA'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	66.6%	68.6%	100.0%	63.8%	71.6%	66.9%	80.0%	100.0%
<b>Airport shuttle</b>	16.5%	17.5%	32.9%	10.0%	10.7%	6.4%	30.9%	100.0%
<b>Trolley</b>	1.4%	0.7%	0.0%	0.0%	0.0%	8.3%	10.9%	0.0%
<b>Public bus</b>	2.3%	1.5%	0.0%	0.0%	0.0%	14.6%	20.0%	0.0%
<b>Tour bus/ tour van</b>	25.8%	33.4%	34.2%	23.6%	29.2%	16.6%	9.1%	0.0%
<b>Taxi/ limo</b>	11.0%	11.3%	32.9%	12.1%	25.1%	31.2%	9.1%	0.0%
<b>Rental car</b>	18.0%	16.0%	0.0%	22.6%	14.0%	12.7%	41.8%	0.0%
<b>Ride share</b>	0.9%	2.1%	0.0%	3.0%	0.0%	16.6%	30.9%	0.0%
<b>Bicycle rental</b>	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are relatively small.

## LANA'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	11.9%	5.7%	0.0%	5.2%	10.7%	14.6%	52.7%	0.0%
Visit friends/ family	11.0%	4.6%	0.0%	1.8%	0.0%	14.6%	43.6%	0.0%
Volunteer- non-profit	0.9%	1.1%	0.0%	3.3%	10.7%	0.0%	9.1%	0.0%

Sample sizes for Lāna'i are relatively small.

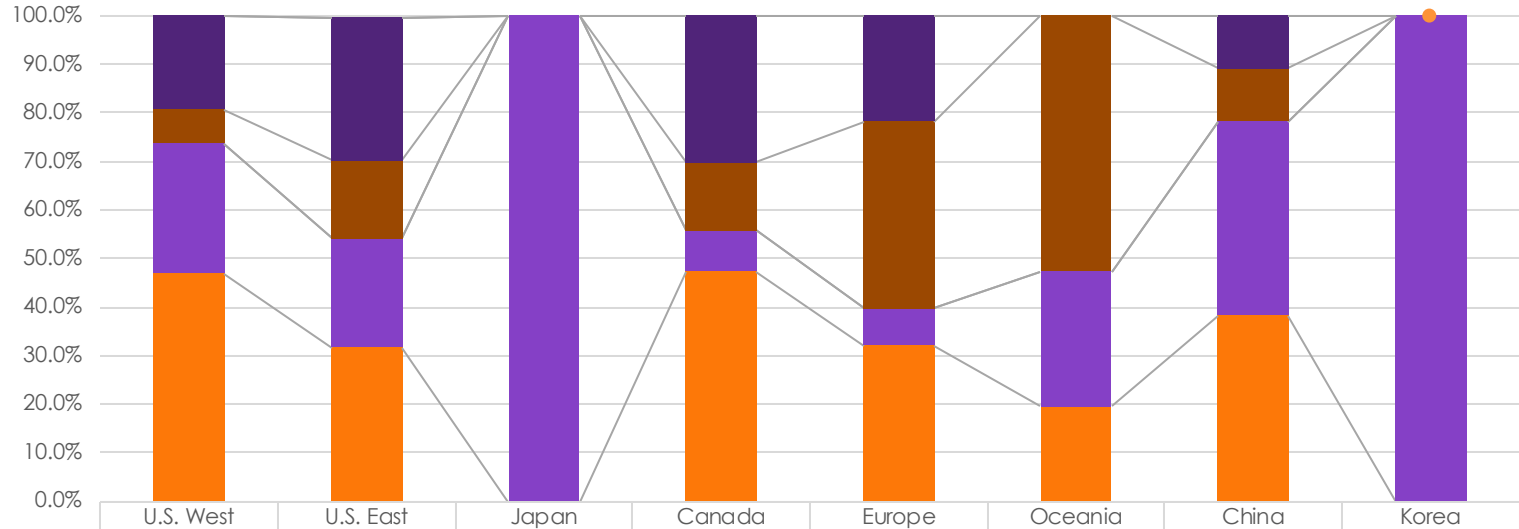


# LANA'I - ACTIVITIES – ATTRACTIONS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hawaiian Village at Kaunolu Fishing Village	4.1%	6.2%	34.2%	8.1%	3.7%	0.0%	21.8%	0.0%
Hulopoe Bay	32.1%	37.6%	0.0%	23.9%	20.2%	21.0%	10.9%	0.0%
Kaiolohia	26.2%	18.5%	0.0%	13.3%	10.7%	0.0%	30.9%	0.0%
Kanepuu Preserve	6.4%	4.4%	0.0%	3.3%	3.7%	0.0%	9.1%	0.0%
Keahiakawelo	18.9%	13.5%	34.2%	10.3%	7.0%	8.3%	0.0%	0.0%
Manele Golf Course	6.9%	12.4%	0.0%	5.5%	0.0%	0.0%	20.0%	0.0%
Munro Trail	3.2%	5.4%	34.2%	1.5%	0.0%	0.0%	60.0%	0.0%
Polihua Beach	16.6%	16.0%	32.9%	15.9%	7.0%	6.4%	30.9%	0.0%
Puu Pehe	24.8%	30.1%	32.9%	13.3%	3.3%	12.7%	20.0%	0.0%

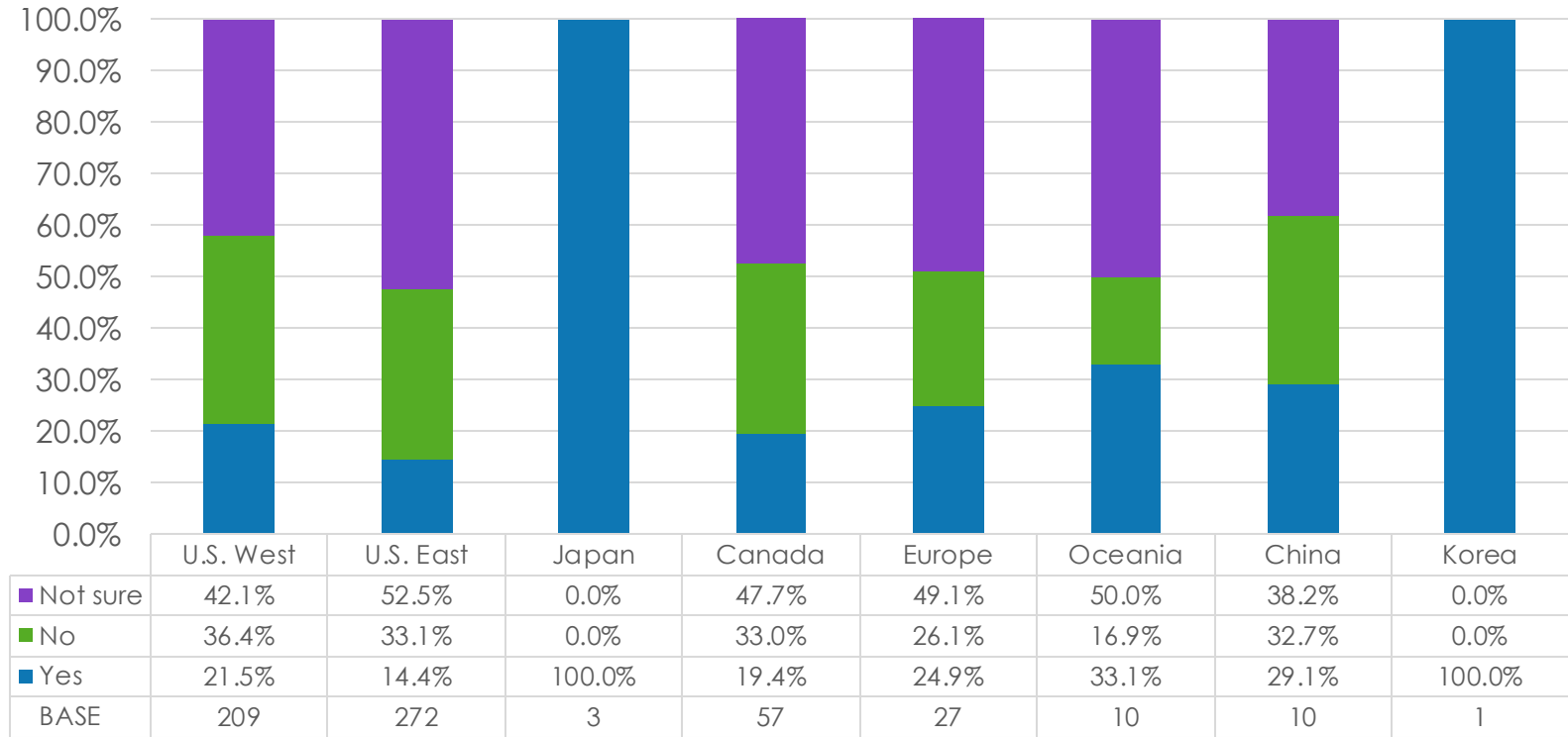
Sample sizes for Lāna'i are relatively small.

# TRANSPORTATION TO LANA'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Private boat	19.2%	29.6%	0.0%	30.2%	21.8%	0.0%	10.9%	0.0%
Cruise ship	7.1%	16.1%	0.0%	14.0%	38.4%	52.6%	10.9%	0.0%
Tour boat	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Air	26.7%	22.6%	100.0%	8.5%	7.7%	27.9%	40.0%	100.0%
Expeditions Ferry	47.0%	31.6%	0.0%	47.3%	32.1%	19.5%	38.2%	0.0%
Base	209	272	3	57	27	10	10	1

# AIRPORT VISITORS CENTER



# SECTION – ISLAND SURVEY METHODOLOGY

## METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (O‘AHU)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error ±</b>
<b>US West</b>	3,995	1.55
<b>US East</b>	5,514	1.32
<b>Japan</b>	4,655	1.44
<b>Canada</b>	2,593	1.92
<b>Europe</b>	1,207	2.82
<b>Oceania</b>	2,219	2.08
<b>China</b>	1,090	2.97
<b>Korea</b>	1,249	2.77
<b>All MMAs</b>	22,522	.65

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	2,053	2.16
<b>US East</b>	2,379	2.01
<b>Japan</b>	61	12.55
<b>Canada</b>	1,176	2.86
<b>Europe</b>	440	4.67
<b>Oceania</b>	212	6.73
<b>China</b>	28	18.52
<b>Korea</b>	40	15.50
<b>All MMAs</b>	6,389	1.23

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	3,140	1.75
<b>US East</b>	3,768	1.60
<b>Japan</b>	128	8.66
<b>Canada</b>	2,856	1.83
<b>Europe</b>	798	3.47
<b>Oceania</b>	335	5.35
<b>China</b>	198	6.96
<b>Korea</b>	184	7.22
<b>All MMAs</b>	11,407	.92

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MOLOKA‘I)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	175	7.41
<b>US East</b>	195	7.02
<b>Japan</b>	6	40.04
<b>Canada</b>	45	14.61
<b>Europe</b>	29	18.20
<b>Oceania</b>	24	20.00
<b>China</b>	9	32.67
<b>Korea</b>	5	43.83
<b>All MMAs</b>	488	4.44

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



# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (LANA‘I)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	229	6.48
<b>US East</b>	337	5.34
<b>Japan</b>	3	56.58
<b>Canada</b>	75	11.32
<b>Europe</b>	37	16.11
<b>Oceania</b>	30	17.89
<b>China</b>	10	30.99
<b>Korea</b>	1	98.00
<b>All MMAs</b>	722	3.65

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	2,532	1.95
<b>US East</b>	3,105	1.76
<b>Japan</b>	2,446	1.98
<b>Canada</b>	1,476	2.55
<b>Europe</b>	574	4.09
<b>Oceania</b>	245	6.26
<b>China</b>	390	4.96
<b>Korea</b>	199	6.95
<b>All MMAs</b>	10,967	.94

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