

# Visitor Satisfaction Study

Q3 2020

Prepared for:  
Hawai'i Tourism Authority

[ANTHOLOGY®]

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# 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. For Q3 2020, 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.).

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	690	3.73	12.43
<b>U.S. East</b>	582	4.06	12.04
<b>All MMAs</b>	1,272	2.75	12.25

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

## METHODOLOGY – OVERALL (cont.)

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

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both MMAs were reported as weighted data based on weights generated for 2020 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

# METHODOLOGY – Effect of COVID-19

In December 2019 and January 2020, the initial cases of novel coronavirus (2019-nCoV)–infected pneumonia (NCIP) occurred in Wuhan, Hubei Province, China. Concerns around the virus and related travel restrictions resulted in suspended flights to and from Canada, China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter.

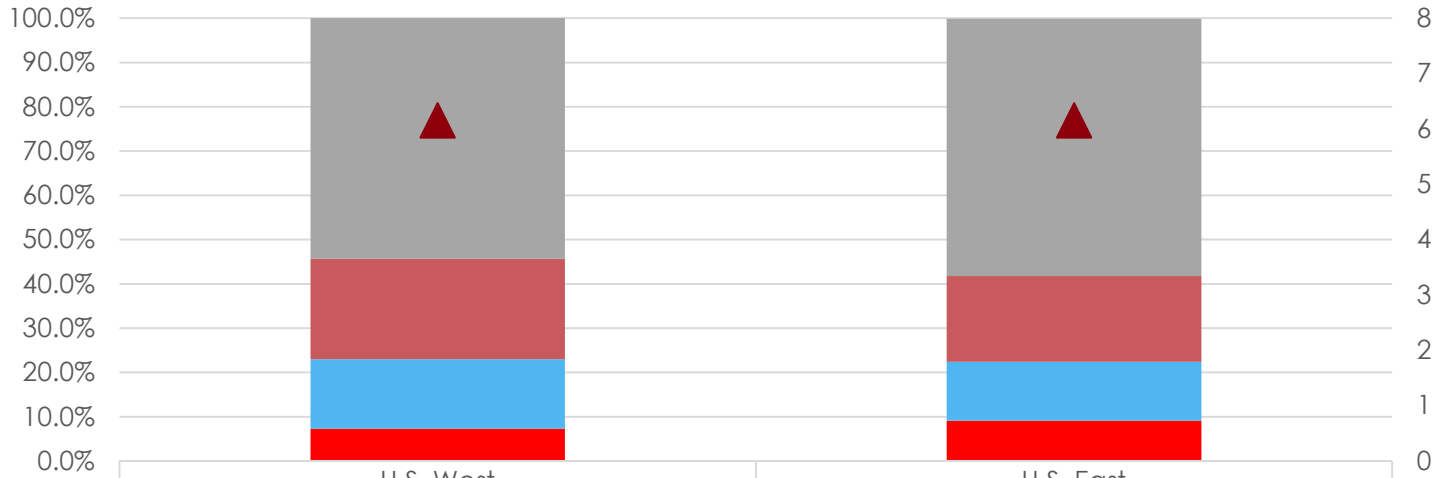
Starting on Thursday, March 26, 2020, the State of Hawai'i required all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. This action limited the number of visitors coming to Hawai'i from the U.S. mainland, thus the sample sizes for this survey are smaller than prior reporting periods.

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

# SECTION – VISITOR SATISFACTION

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



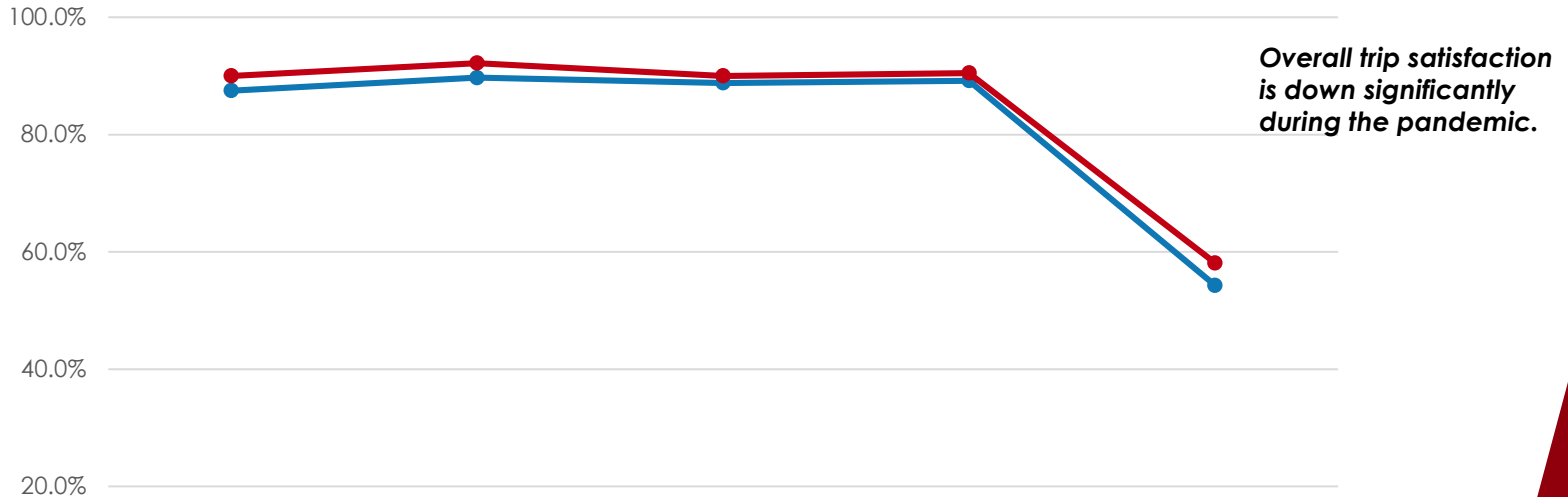
	U.S. West	U.S. East
■ Excellent (7-8)	54.3%	58.1%
■ Above Avg (5-6)	22.7%	19.4%
■ Below Avg (3-4)	15.7%	13.3%
■ Poor (1-2)	7.3%	9.1%
BASE	690	582
▲ MEAN	6.15	6.15

# SATISFACTION – STATE OF HAWAI‘I BY MMA

- **Household income:** Less affluent travelers from U.S. West and U.S. East or those with combined household incomes below \$100K were more satisfied overall with their trip compared to travelers from these markets in households with combined incomes in excess of \$100K.
- **Visited multiple islands:** Visitors from U.S. East who visited multiple islands gave higher satisfaction scores than visitors from this market who visited a single island during their stay.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than males.

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



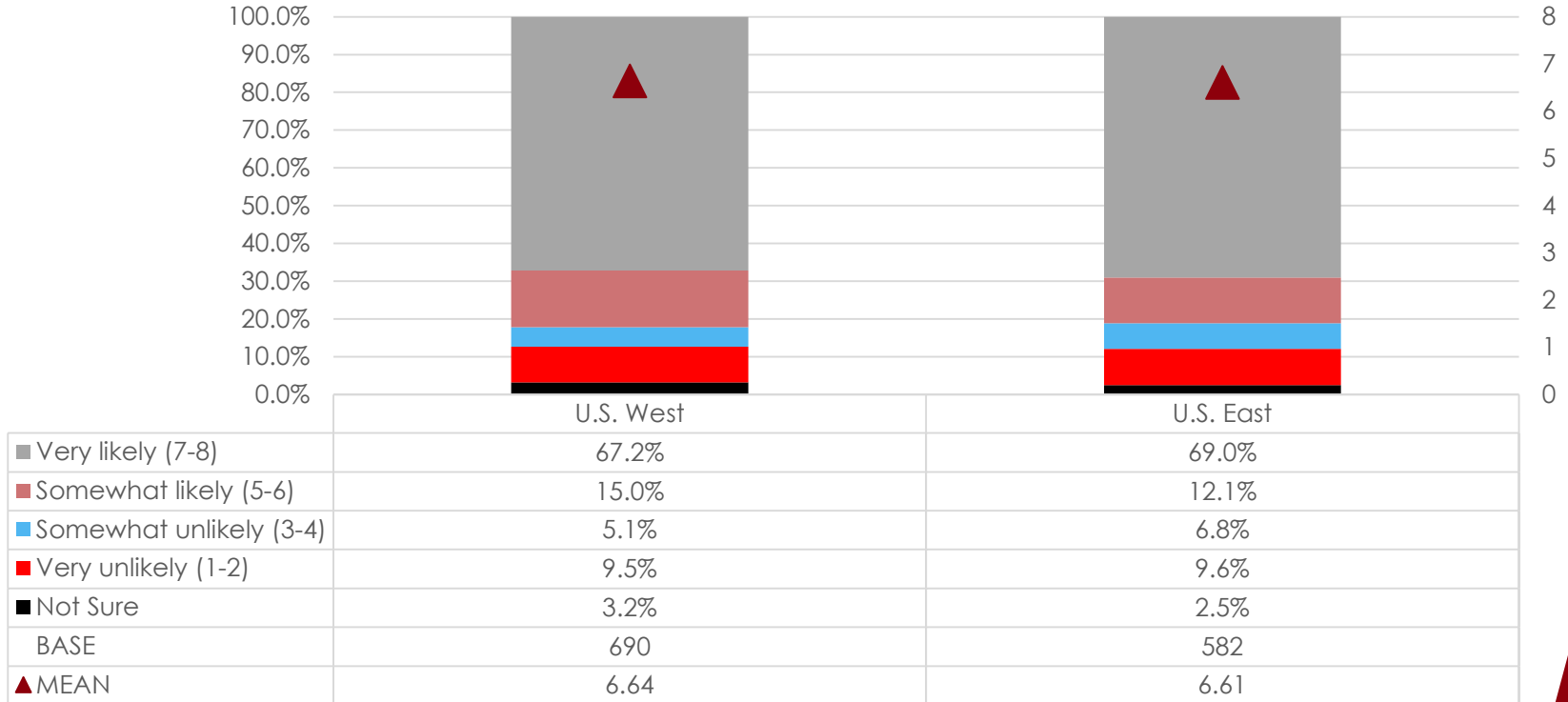
	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	87.5%	89.7%	88.8%	89.2%	54.3%
U.S. East	90.0%	92.2%	90.0%	90.5%	58.1%

P= Preliminary Data



# BRAND/DESTINATION – ADVOCACY

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

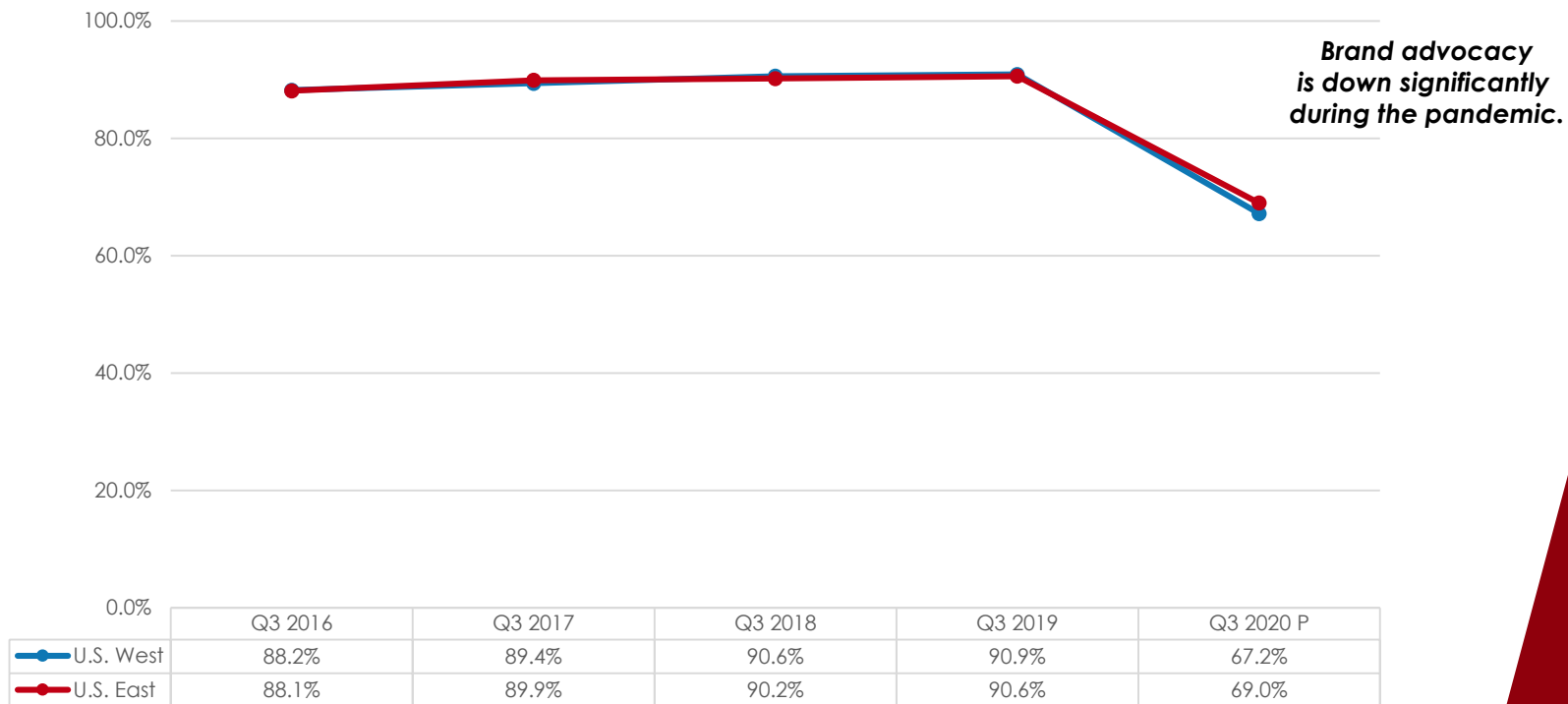


# BRAND/DESTINATION – ADVOCACY

- **Education:** Visitors from U.S. East who do not have a college degree expressed a greater likelihood of recommending the state to others compared to those with a college degree from this market.
- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to males.
- **Visits to Hawai'i:** Repeat visitors from U.S. West were more likely to be advocates for the state than first-time visitors from this region.

# BRAND/DESTINATION – ADVOCACY

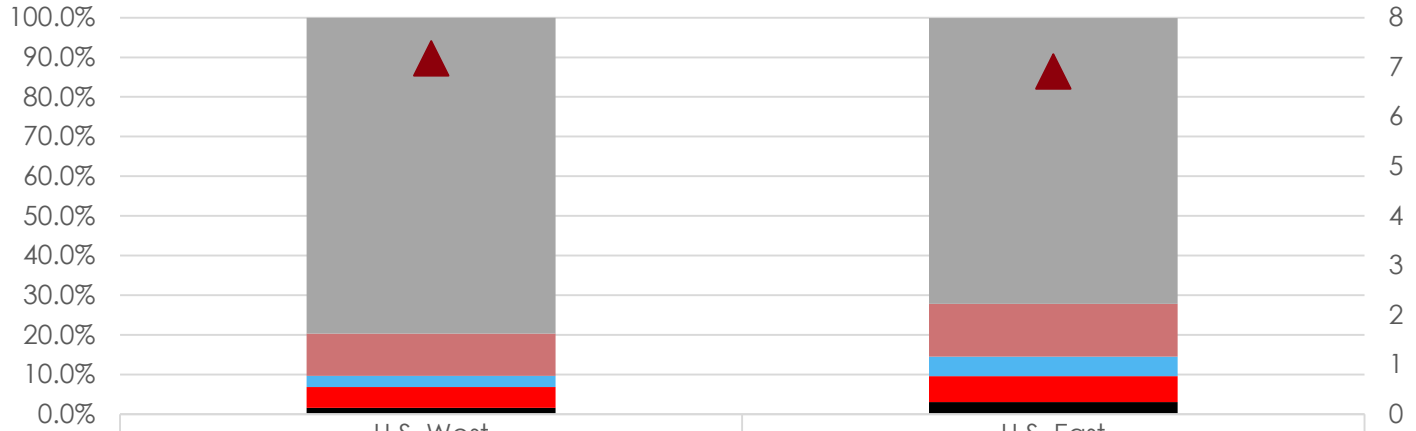
## TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



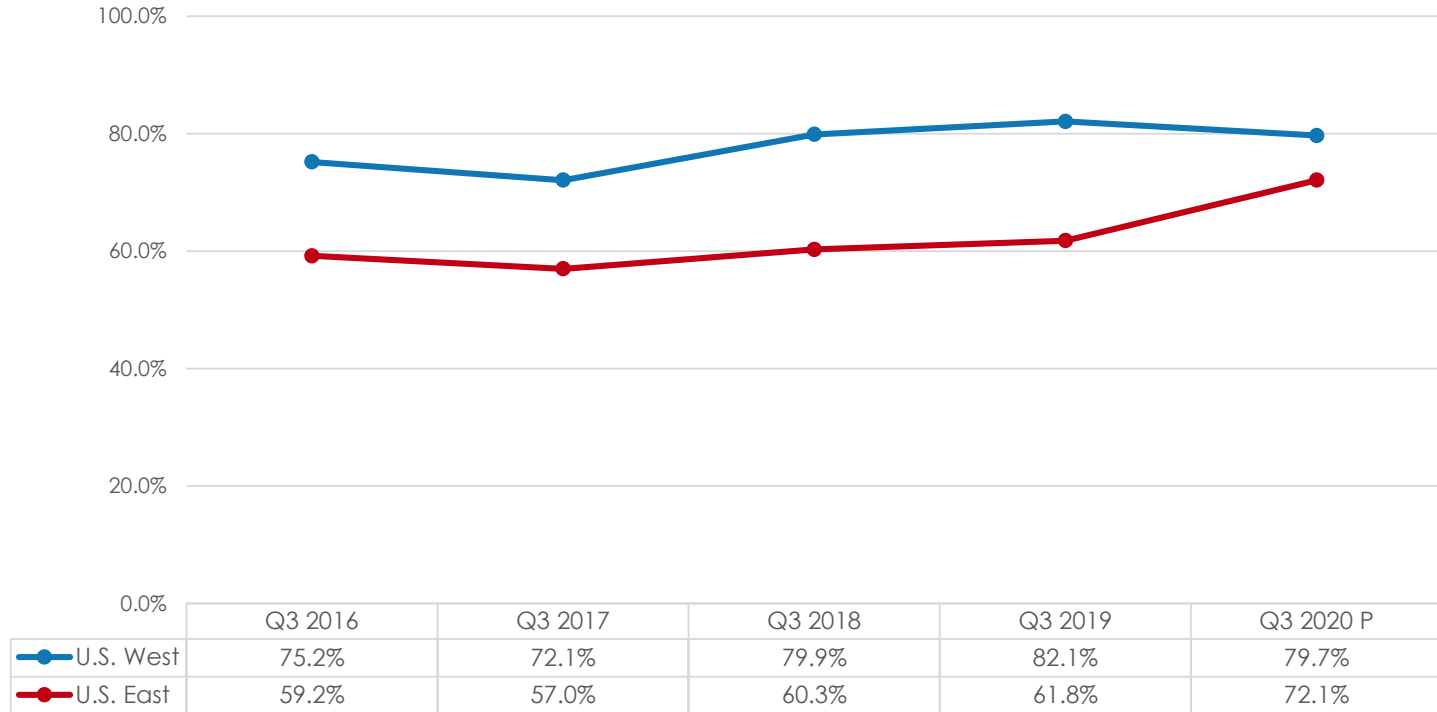
	U.S. West	U.S. East
■ Very likely (7-8)	79.7%	72.1%
■ Somewhat likely (5-6)	10.6%	13.3%
■ Somewhat unlikely (3-4)	2.8%	4.9%
■ Very unlikely (1-2)	5.3%	6.5%
■ Not Sure	1.6%	3.1%
BASE	690	582
▲ MEAN	7.18	6.91

# LIKELIHOOD OF RETURN VISIT

- **Education:** Visitors from U.S. West with a college degree appeared more likely to return to the state within the next five years, compared to those without a college degree from this market.
- **Gender:** Female visitors from both U.S. West and U.S. East were more likely to return to the state than their male counterparts.
- **First-time vs Repeat Visitors:** Repeat visitors from both U.S. West and U.S. East expressed a greater likelihood of returning to the state than first-time visitors from these markets.

# LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

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

Q3 2019	Q3 2020 P
45.0% Want to go someplace new	54.5% COVID-19
43.4% Too expensive	25.3% Unfriendly people/ Felt unwelcome
31.1% Too crowded/ congested/ traffic	21.0% Too expensive
29.2% Poor value	15.2% Poor value
22.2% Too commercialized/ overdeveloped	11.7% Poor service
16.1% Other financial obligations	11.7% Too commercialized/ overdeveloped
12.4% Five years is too soon	

P= Preliminary Data



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

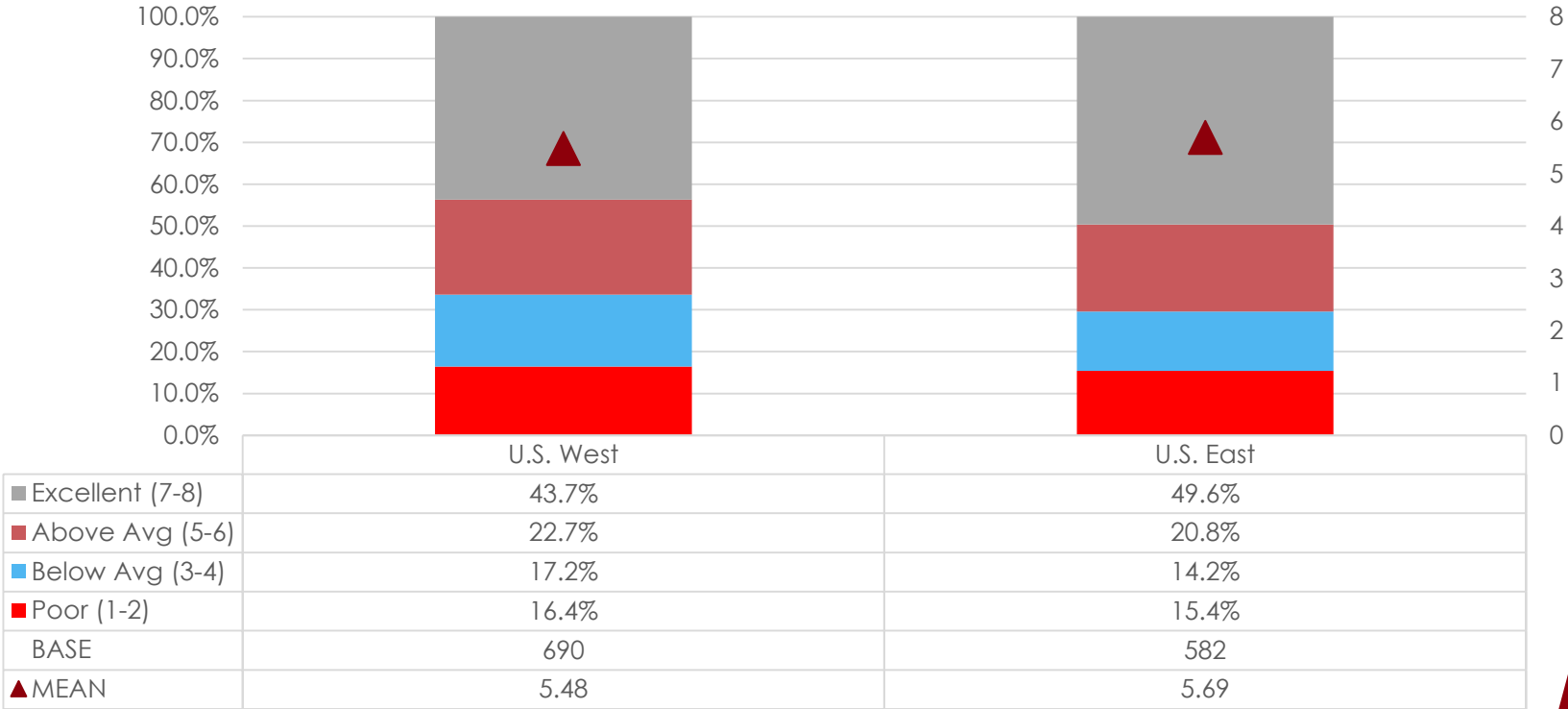
Q3 2019	Q3 2020 P
51.9% Too expensive	41.5% COVID-19
45.4% Want to go someplace new	31.2% Too expensive
41.0% Flight is too long	20.3% Unfriendly people/ felt unwelcome
22.3% Five years is too soon	18.6% Poor service
14.8% Other financial obligations	17.5% Poor value
14.7% Poor value	17.3% No compelling reason/ nothing new
13.5% Too crowded/ congested/ traffic	16.3% Want to go someplace new
	16.1% Flight too long
	11.1% Too crowded/ congested/ traffic

P= Preliminary Data



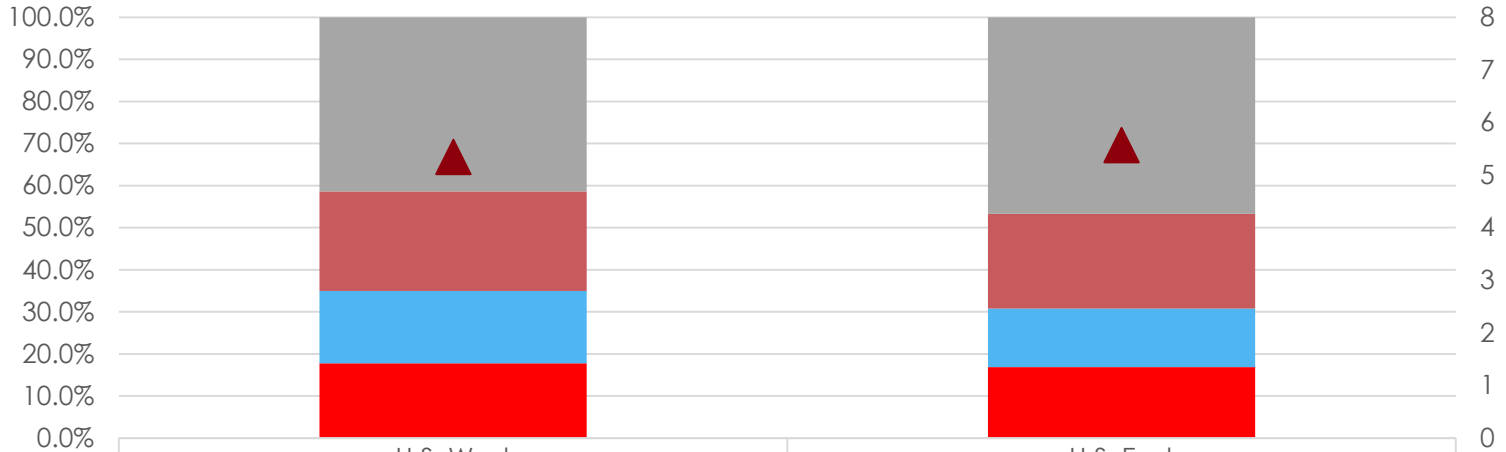
# OFFERING A VARIETY OF EXPERIENCES

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



# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

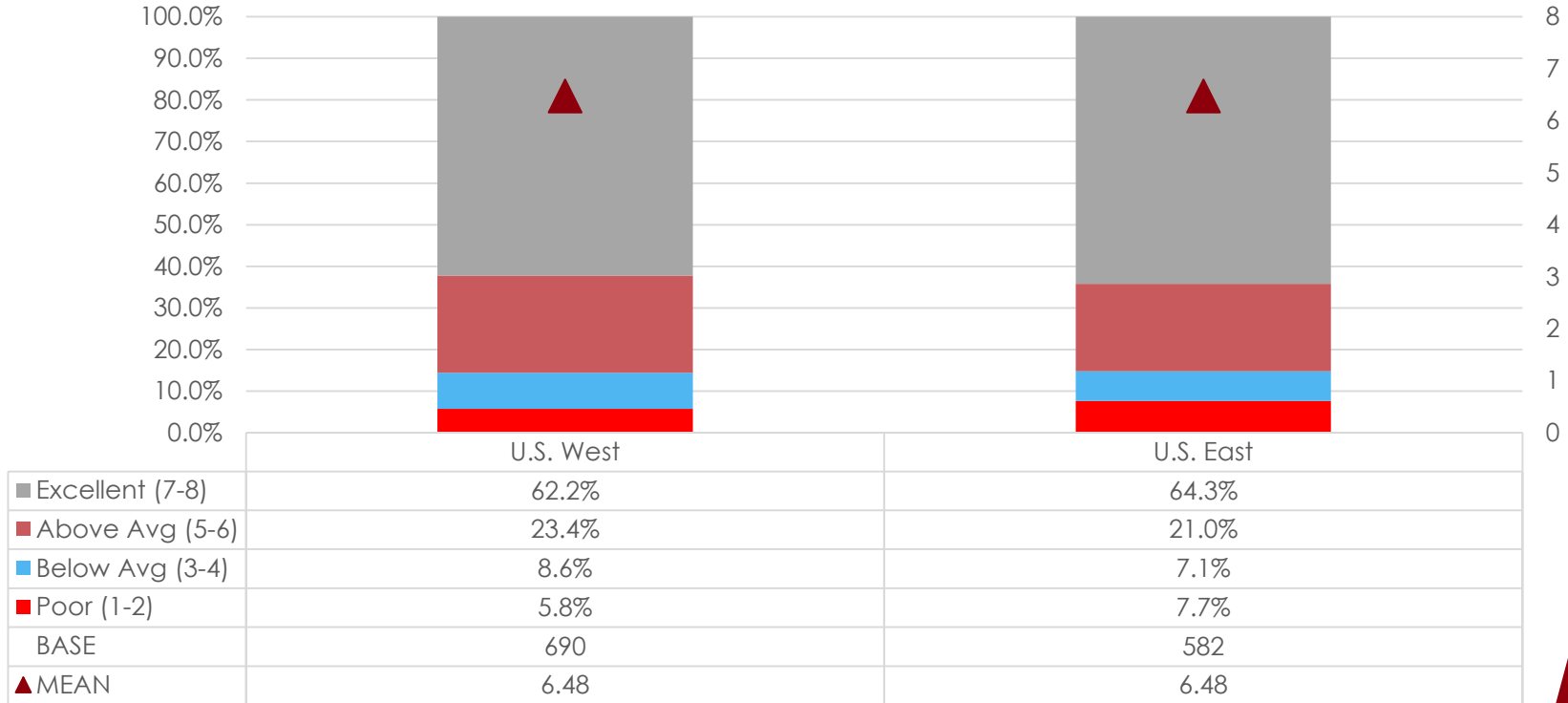
8-pt Rating Scale  
8=Excellent / 1=Poor



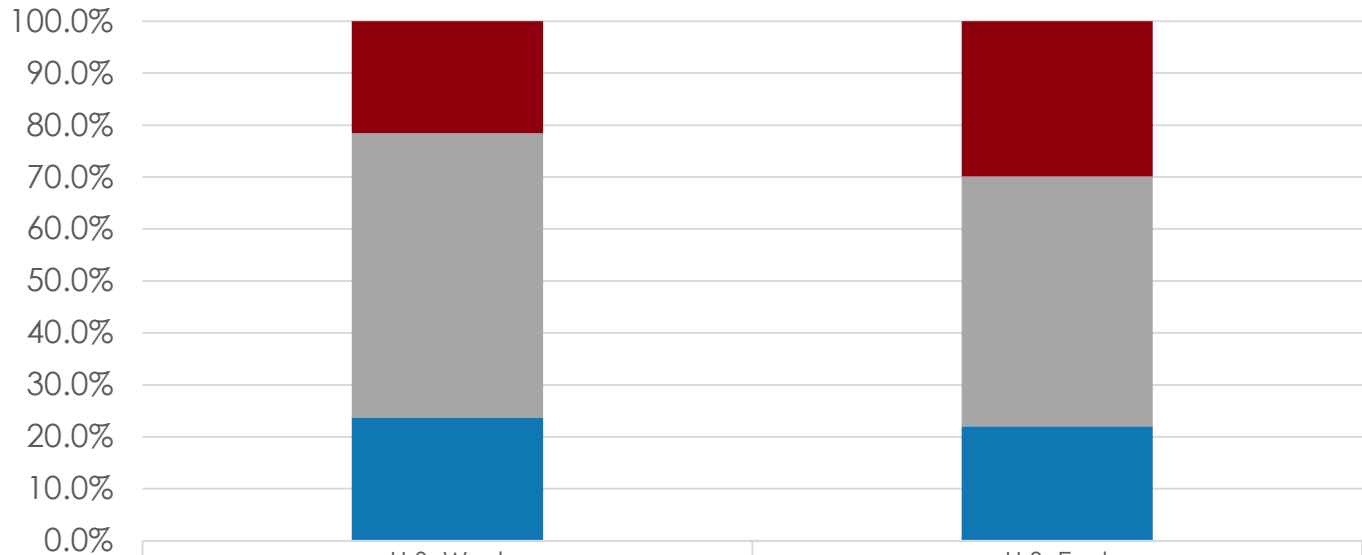
	U.S. West	U.S. East
■ Excellent (7-8)	41.4%	46.7%
■ Above Avg (5-6)	23.6%	22.5%
■ Below Avg (3-4)	17.2%	13.9%
■ Poor (1-2)	17.8%	16.9%
BASE	690	582
▲ MEAN	5.35	5.57

# BEING A SAFE AND SECURE DESTINATION

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



# SATISFACTION – HAWAI'I TRIP EXPECTATIONS



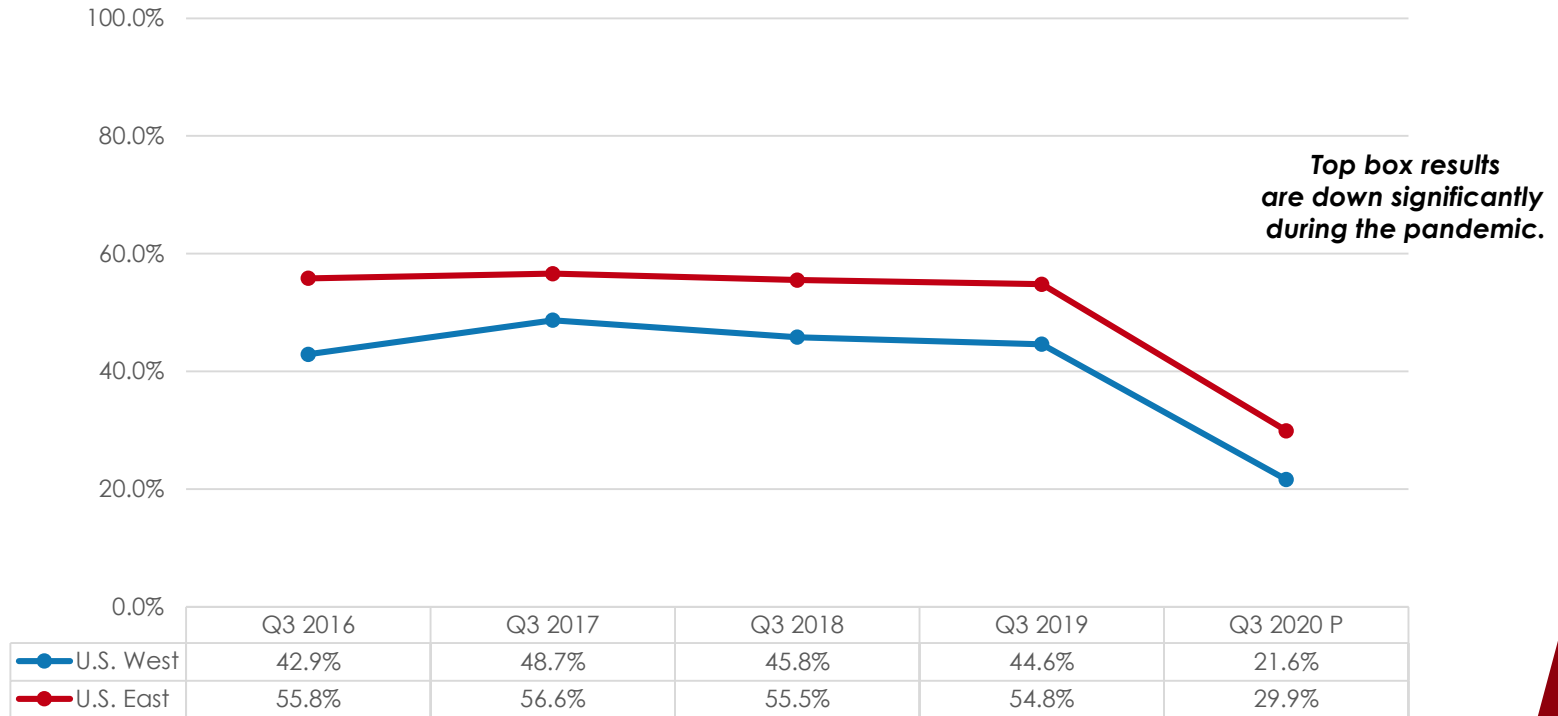
	U.S. West	U.S. East
Exceeded expectations	21.6%	29.9%
Met expectations	54.8%	48.1%
Did NOT meet expectations	23.6%	22.0%
BASE	690	582

# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Age:** Younger travelers from U.S. East tended to be more satisfied with their trip in terms of prior expectations than older travelers from this visitor market.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to agree that their trip exceeded their expectations than males from these visitor markets.
- **First-time vs. repeat visitors:** Among visitors from U.S. West, repeat visitors were more satisfied in this area than first-time visitors, while the opposite was true among visitors from U.S. East.

# SATISFACTION – HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



P= Preliminary Data

# SECTION – ACTIVITIES

## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
<b>TOTAL</b>	69.6%	74.1%
<b>On own (self-guided)</b>	58.5%	62.4%
<b>Helicopter/ airplane</b>	1.1%	0.3%
<b>Boat/ submarine/ whale</b>	4.0%	3.3%
<b>Visit towns/communities</b>	24.7%	25.6%
<b>Limo/ van/ bus tour</b>	0.3%	1.1%
<b>Scenic views/ natural landmark</b>	24.1%	34.8%
<b>Movie/ TV/ film location</b>	1.3%	2.5%



# ACTIVITIES – RECREATION

	U.S. West	U.S. East
<b>TOTAL</b>	65.3%	68.6%
<b>Beach/ sunbathing</b>	45.3%	51.0%
<b>Bodyboarding</b>	9.9%	5.9%
<b>Standup paddle board</b>	5.7%	5.8%
<b>Surfing</b>	9.2%	7.3%
<b>Canoeing/ kayak</b>	4.0%	5.2%
<b>Swim in the ocean</b>	39.2%	39.5%
<b>Snorkeling</b>	21.1%	23.3%
<b>Freediving</b>	2.3%	2.3%
<b>Windsurf/ Kitesurf</b>	0.3%	0.3%
<b>Jet ski/ Parasail</b>	0.0%	0.4%
<b>Scuba diving</b>	1.6%	2.3%
<b>Fishing</b>	4.2%	3.6%
<b>Golf</b>	2.8%	3.1%

## ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
<b>TOTAL</b>	65.3%	68.6%
<b>Run/ Jog/ Fitness walk</b>	26.9%	29.9%
<b>Spa</b>	2.3%	2.6%
<b>Hiking</b>	22.1%	26.8%
<b>Backpack/ camp</b>	1.6%	2.3%
<b>Agritourism</b>	3.7%	3.9%
<b>Sport event/ tournament</b>	0.1%	0.2%
<b>Park/ botanical garden</b>	12.8%	16.6%
<b>Waterpark</b>	0.5%	1.1%
<b>Mountain tube/ waterfall rappel</b>	0.3%	0.9%
<b>Zip-lining</b>	0.7%	1.3%
<b>Skydiving</b>	0.0%	0.2%
<b>All terrain vehicle (ATV)</b>	1.2%	2.1%
<b>Horseback riding</b>	1.7%	1.4%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
<b>TOTAL</b>	92.5%	91.6%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	8.6%	9.5%
<b>Live music/ stage show</b>	2.6%	3.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	2.1%	2.9%
<b>Fine dining</b>	14.6%	12.4%
<b>Family restaurant</b>	30.9%	30.4%
<b>Fast food</b>	40.5%	42.4%
<b>Food truck</b>	22.5%	26.3%
<b>Café/ coffee house</b>	20.8%	20.4%
<b>Ethnic dining</b>	14.2%	15.1%
<b>Prepared own meal</b>	69.6%	67.6%

# ACTIVITIES – SHOPPING

	U.S. West	U.S. East
<b>TOTAL</b>	71.2%	71.7%
<b>Mall/ department store</b>	24.8%	24.2%
<b>Designer boutique</b>	3.6%	4.1%
<b>Hotel/ resort store</b>	5.0%	6.2%
<b>Swap meet/ flea market</b>	5.7%	6.6%
<b>Discount/ outlet store</b>	8.2%	9.0%
<b>Supermarket</b>	55.2%	49.2%
<b>Farmer's market</b>	17.3%	17.7%
<b>Convenience store</b>	25.2%	27.1%
<b>Duty free store</b>	1.2%	2.7%
<b>Local shop/ artisan</b>	23.9%	25.7%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
<b>TOTAL</b>	31.0%	36.3%
<b>Historic military site</b>	8.2%	12.7%
<b>Other historical site</b>	10.4%	12.4%
<b>Museum/ art gallery</b>	4.8%	4.3%
<b>Luau/ Polynesian show/ hula show</b>	0.4%	1.5%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	1.6%	1.2%
<b>Play/ concert/ theatre</b>	1.2%	0.7%
<b>Art/ craft fair</b>	2.3%	2.1%
<b>Festival event</b>	10.5%	10.2%

## ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East
<b>TOTAL</b>	52.0%	51.8%
<b>Airport shuttle</b>	3.0%	3.7%
<b>Trolley</b>	0.3%	0.0%
<b>Public bus</b>	2.6%	3.3%
<b>Tour bus/ tour van</b>	0.3%	0.4%
<b>Taxi/ limo</b>	9.7%	7.6%
<b>Rental car</b>	31.6%	30.2%
<b>Ride share</b>	18.0%	16.7%
<b>Bicycle rental</b>	0.8%	1.9%

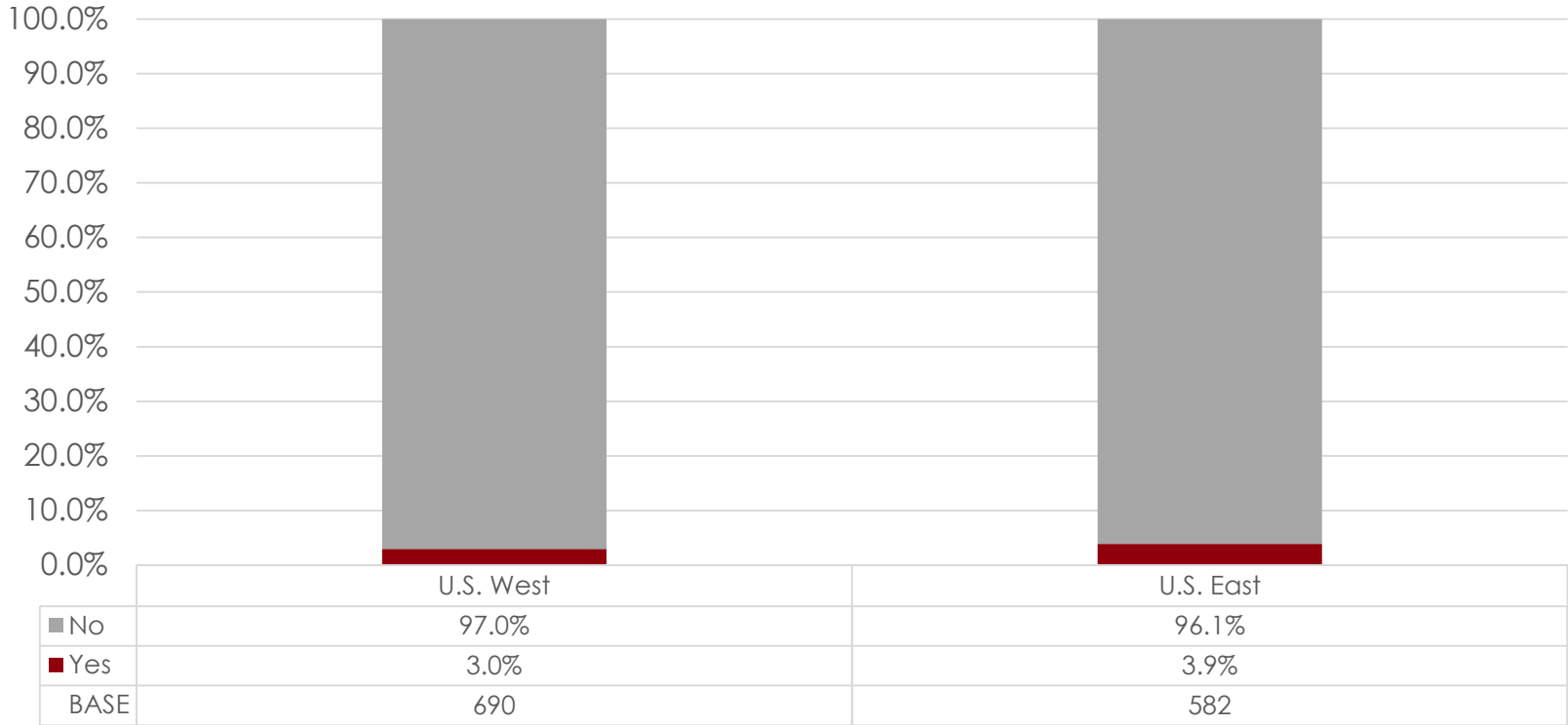
## ACTIVITIES – OTHER

	U.S. West	U.S. East
TOTAL	62.5%	64.6%
Visit friends/ family	61.7%	63.6%
Volunteer non-profit	1.4%	1.9%

# SECTION – TRAVELERS WITH DISABILITIES



# DISABLED TRAVELER – REQUIRED ASSISTANCE

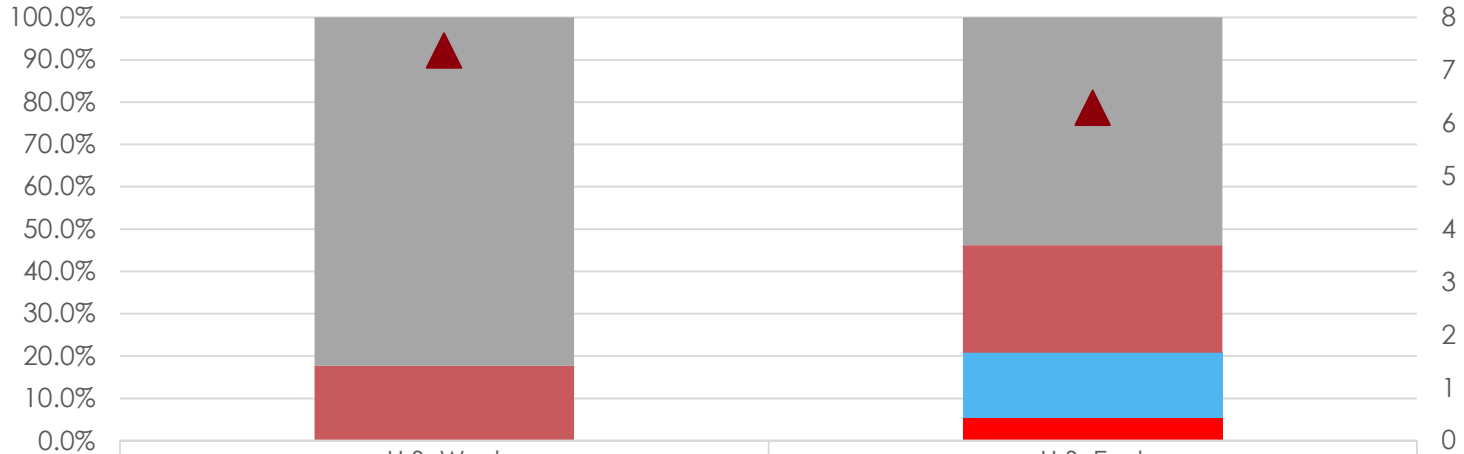


# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane)	68.4%	62.5%
Personal assistance	18.1%	17.3%
Other disability related aid	9.0%	14.6%
Service/ assistance animal	4.5%	4.9%
No one in our travel party required assistance	4.5%	9.0%
Orientation and mobility assistance	4.5%	0.0%
ASL Interpreter/ texting/ captioning	4.5%	0.0%
Lift equipped van	0.0%	0.0%
Print material in alternate format	0.0%	0.0%
BASE	21	22

# OVERALL ACCESSIBILITY – AIRPORTS

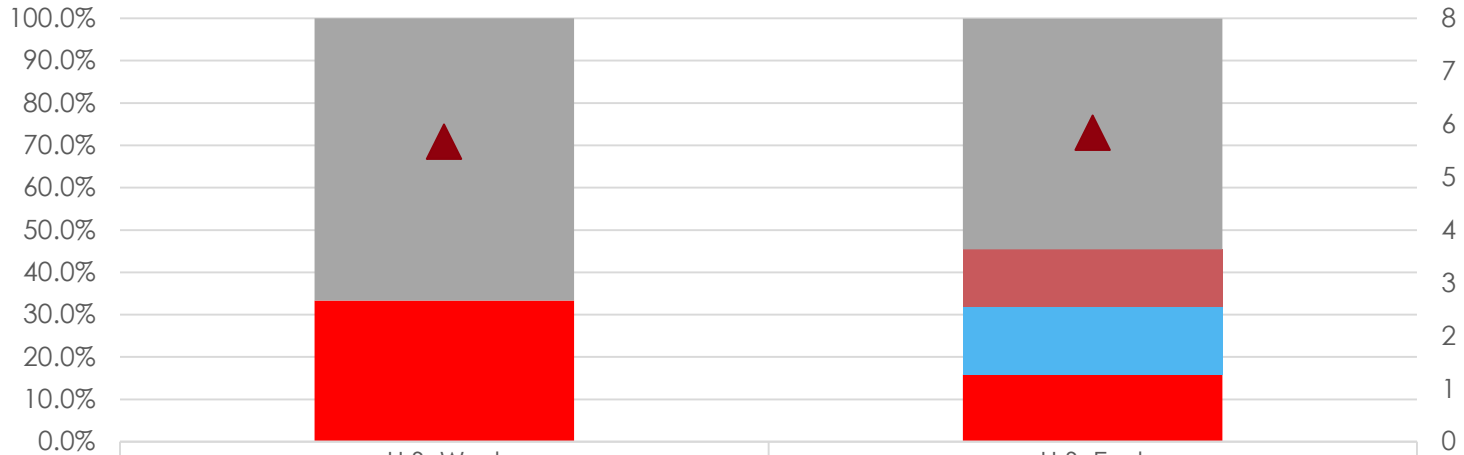
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	82.3%	53.8%
■ Above Avg (5-6)	17.7%	25.4%
■ Below Avg (3-4)	0.0%	15.4%
■ Poor (1-2)	0.0%	5.4%
BASE	19	20
▲ MEAN	7.37	6.29

# OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

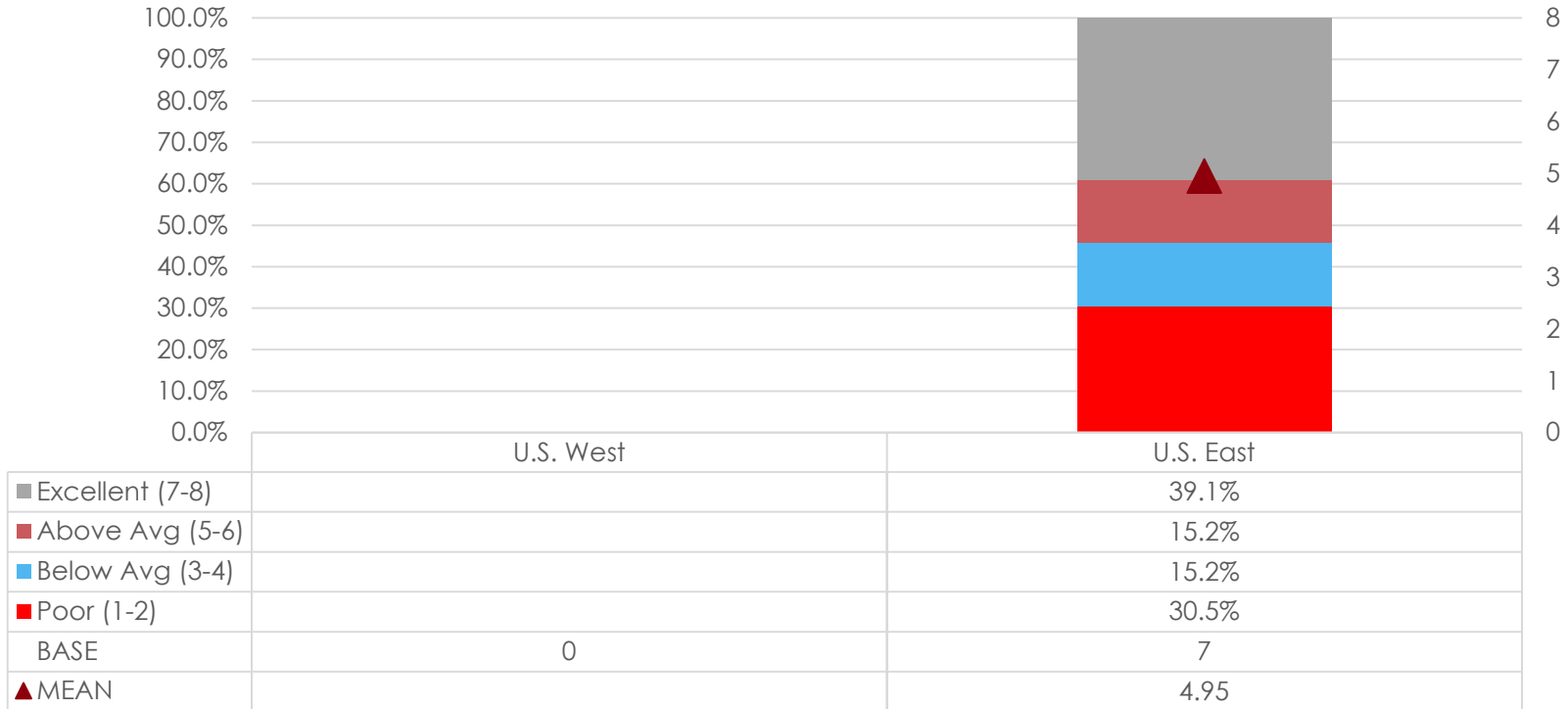
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	66.7%	54.5%
■ Above Avg (5-6)	0.0%	13.6%
■ Below Avg (3-4)	0.0%	15.9%
■ Poor (1-2)	33.3%	15.9%
BASE	3	7
▲ MEAN	5.67	5.84

# OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



# OVERALL ACCESSIBILITY – RIDE SHARE

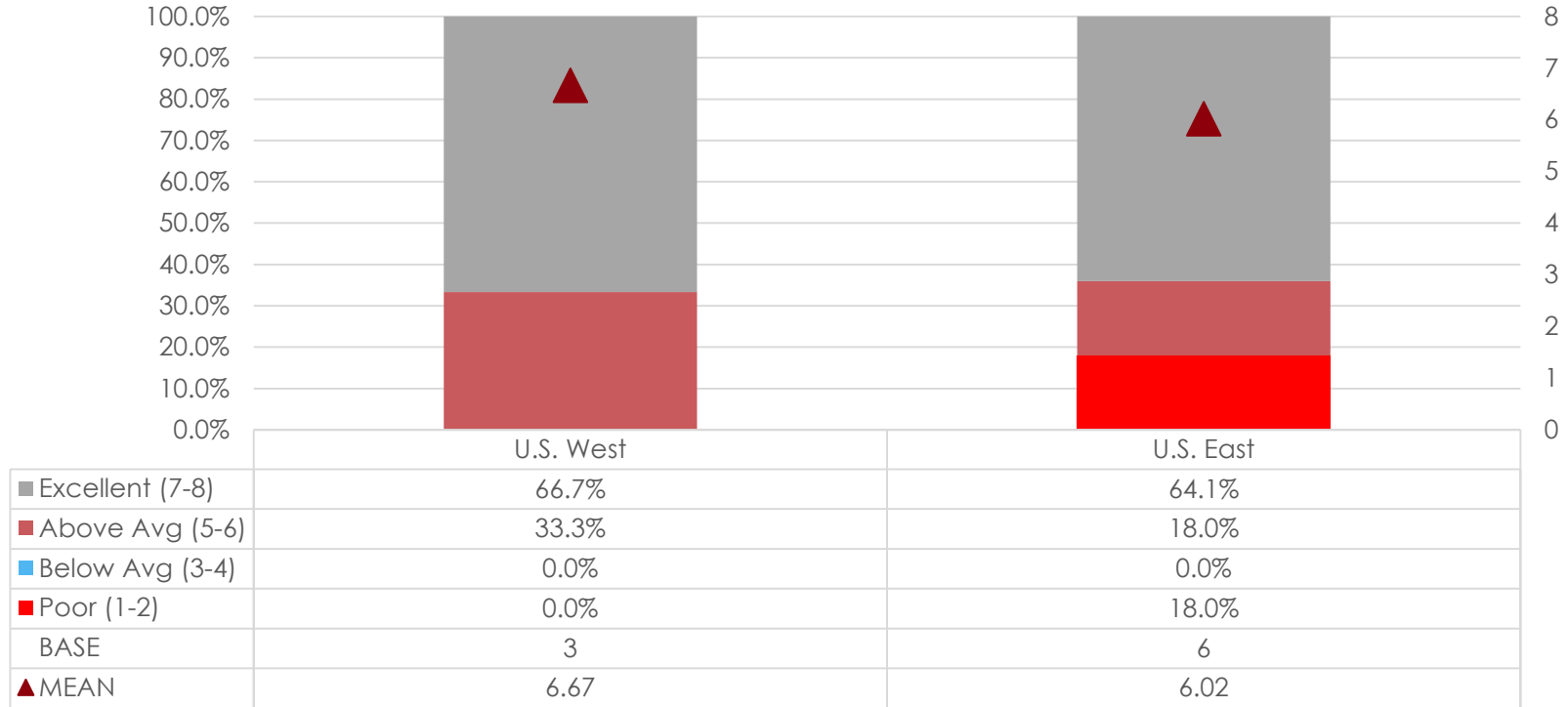
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	0.0%	47.0%
■ Above Avg (5-6)	100.0%	25.5%
■ Below Avg (3-4)	0.0%	13.7%
■ Poor (1-2)	0.0%	13.7%
BASE	1	8
▲ MEAN	5.00	5.86

# OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

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



# OVERALL ACCESSIBILITY – HOTELS

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

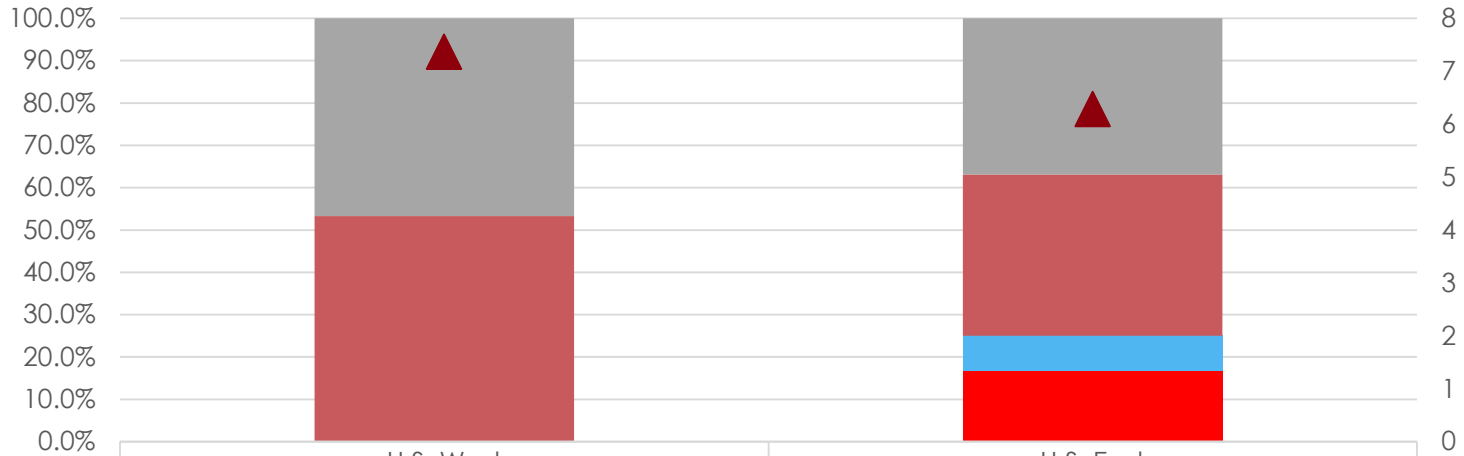


	U.S. West	U.S. East
■ Excellent (7-8)	100.0%	53.3%
■ Above Avg (5-6)	0.0%	15.6%
■ Below Avg (3-4)	0.0%	0.0%
■ Poor (1-2)	0.0%	31.2%
BASE	1	7
▲ MEAN	8.00	5.35



# OVERALL ACCESSIBILITY – RESTAURANTS

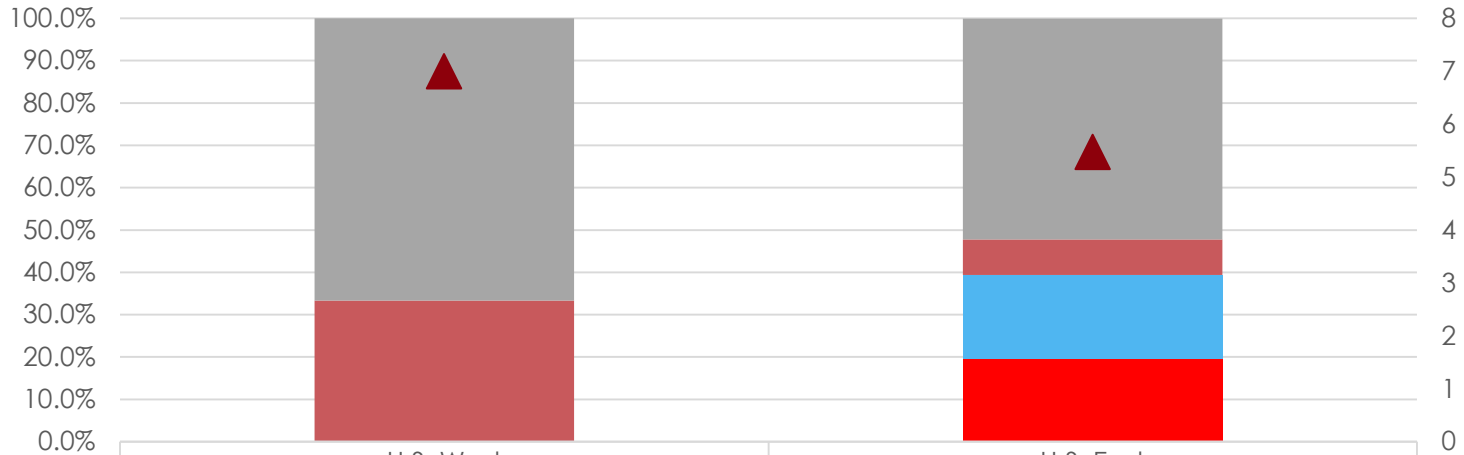
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	46.7%	36.9%
■ Above Avg (5-6)	53.3%	38.1%
■ Below Avg (3-4)	0.0%	8.3%
■ Poor (1-2)	0.0%	16.7%
BASE	8	13
▲ MEAN	7.37	6.29

# OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

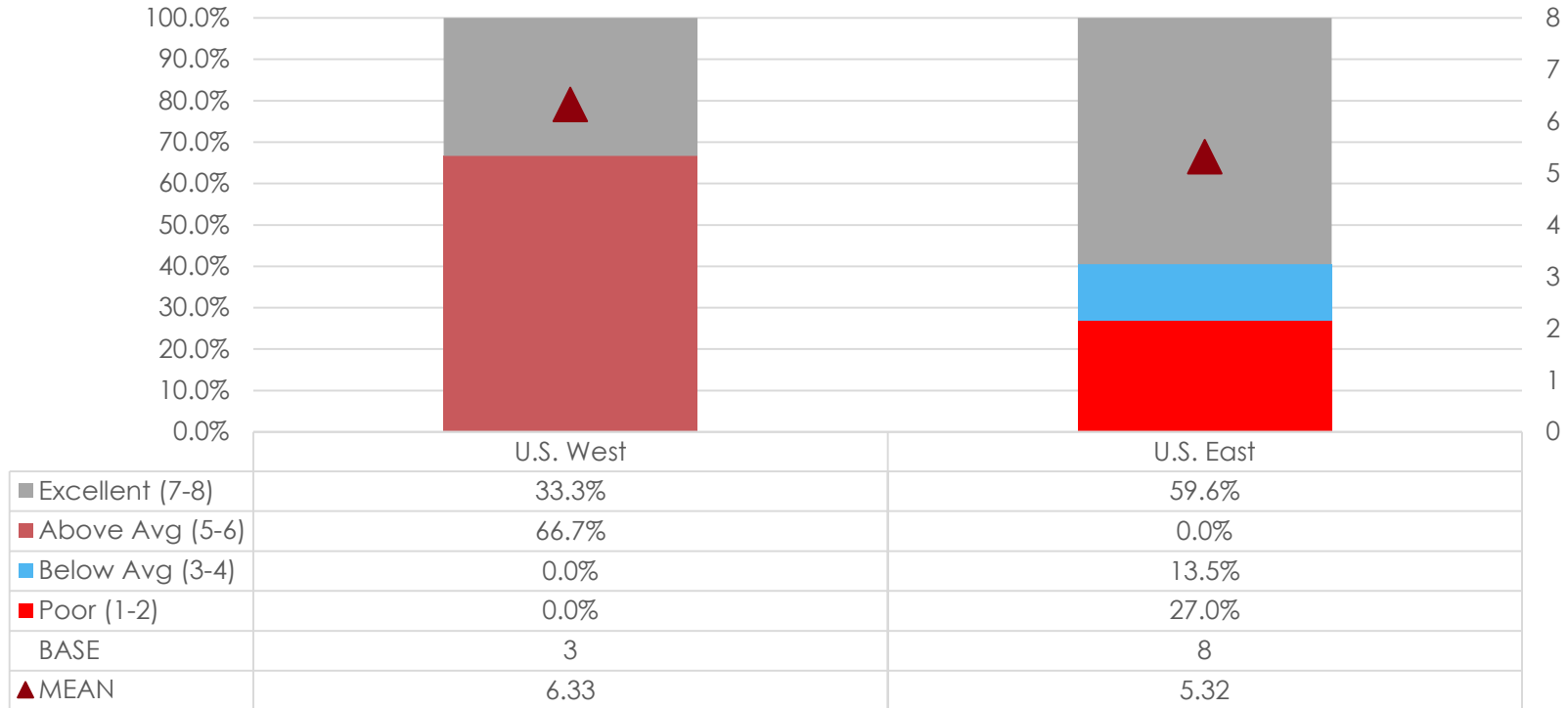
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	66.7%	52.1%
■ Above Avg (5-6)	33.3%	8.4%
■ Below Avg (3-4)	0.0%	19.7%
■ Poor (1-2)	0.0%	19.7%
BASE	3	11
▲ MEAN	7.00	5.48

# OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

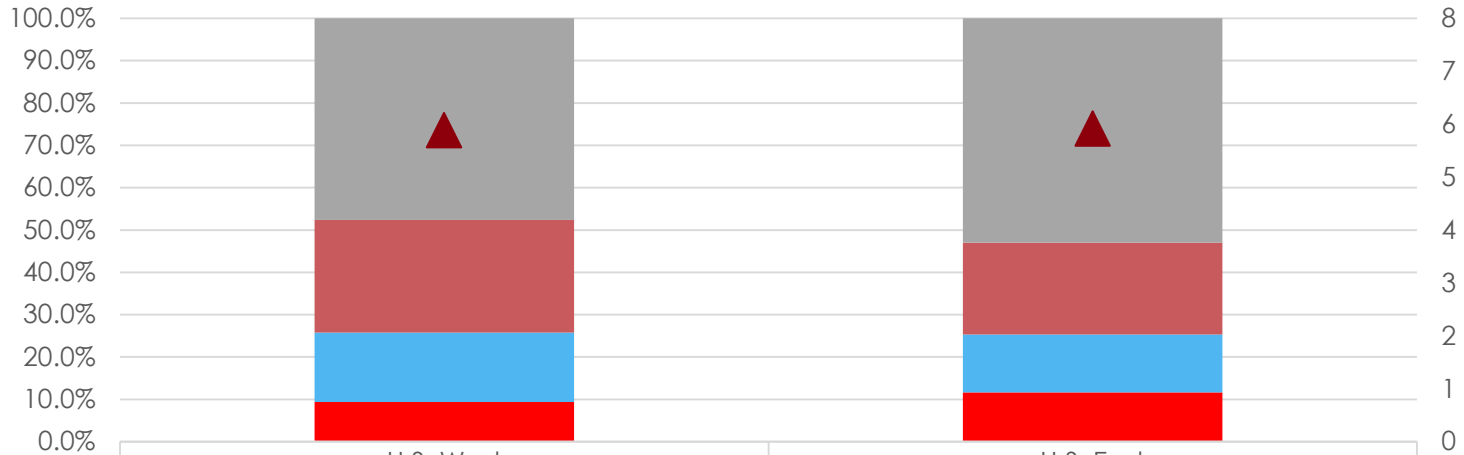
8-pt Rating Scale  
8=Excellent / 1=Poor



# SECTION – O'AHU

# SATISFACTION – O‘AHU

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



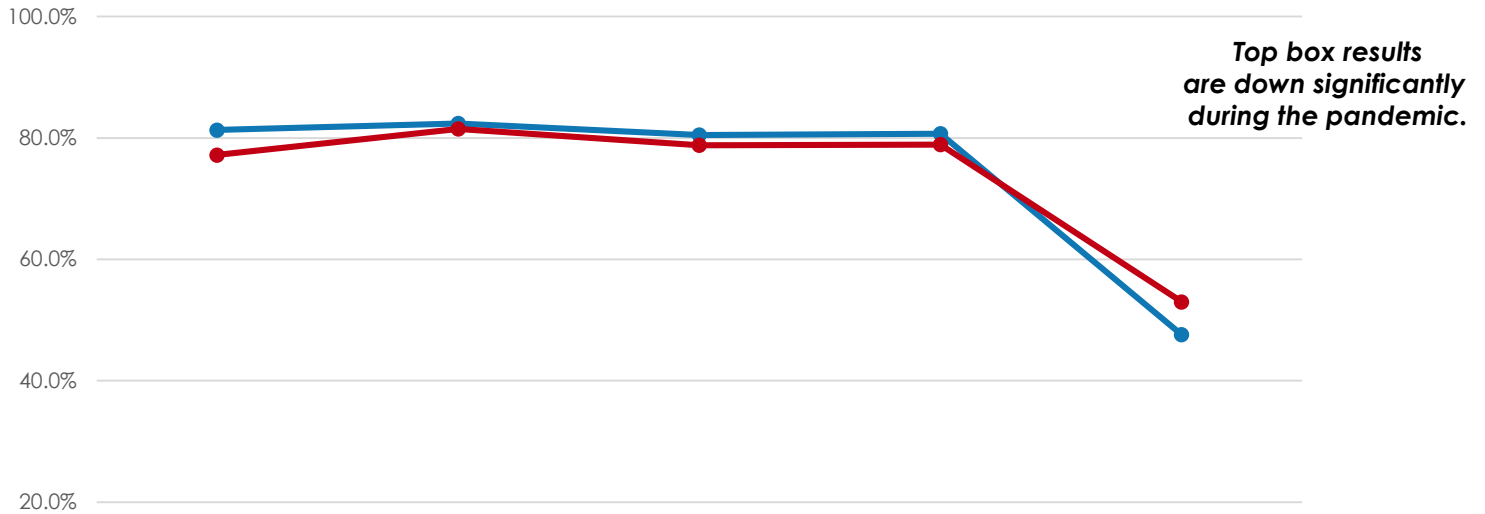
	U.S. West	U.S. East
■ Excellent (7-8)	47.6%	53.0%
■ Above Avg (5-6)	26.6%	21.7%
■ Below Avg (3-4)	16.4%	13.7%
■ Poor (1-2)	9.4%	11.6%
BASE	449	437
▲ MEAN	5.89	5.92

# SATISFACTION – O‘AHU

- **Household income:** Less affluent travelers from both U.S. West and U.S. East (those with combined household incomes below \$100K) were more satisfied with their trip than visitors in household with income that exceeded \$100K a year.
- **Age:** Younger travelers from U.S. East (those under the age of 35) were the most satisfied with their stay on O‘ahu.
- **Gender:** Female visitors from U.S. East were more satisfied with their stay on O‘ahu than males from this visitor market.

# SATISFACTION – O‘AHU

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



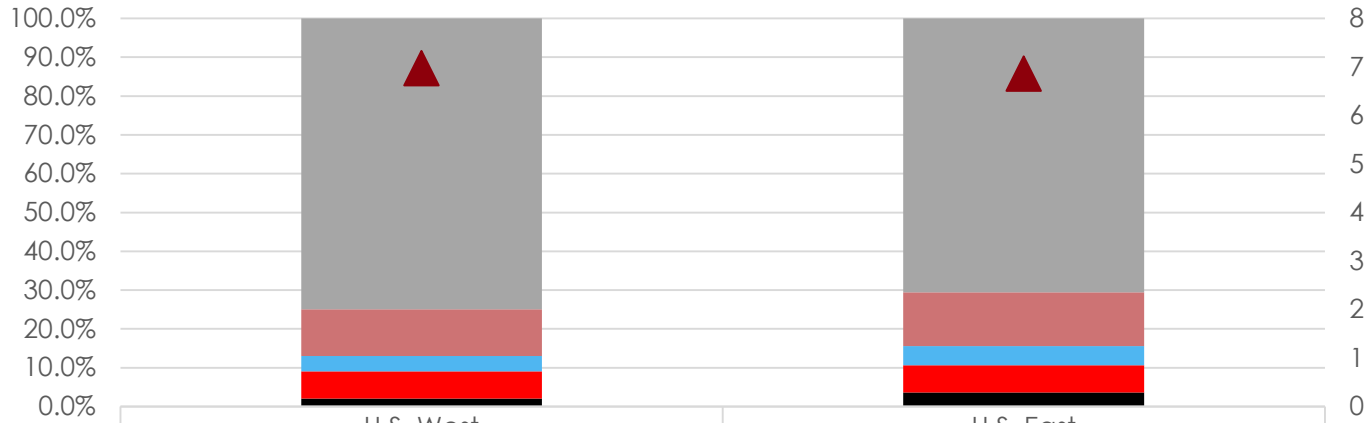
	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	81.3%	82.4%	80.5%	80.7%	47.6%
U.S. East	77.2%	81.5%	78.8%	78.9%	53.0%

P= Preliminary Data



# LIKELIHOOD OF RETURN VISIT – O‘AHU

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

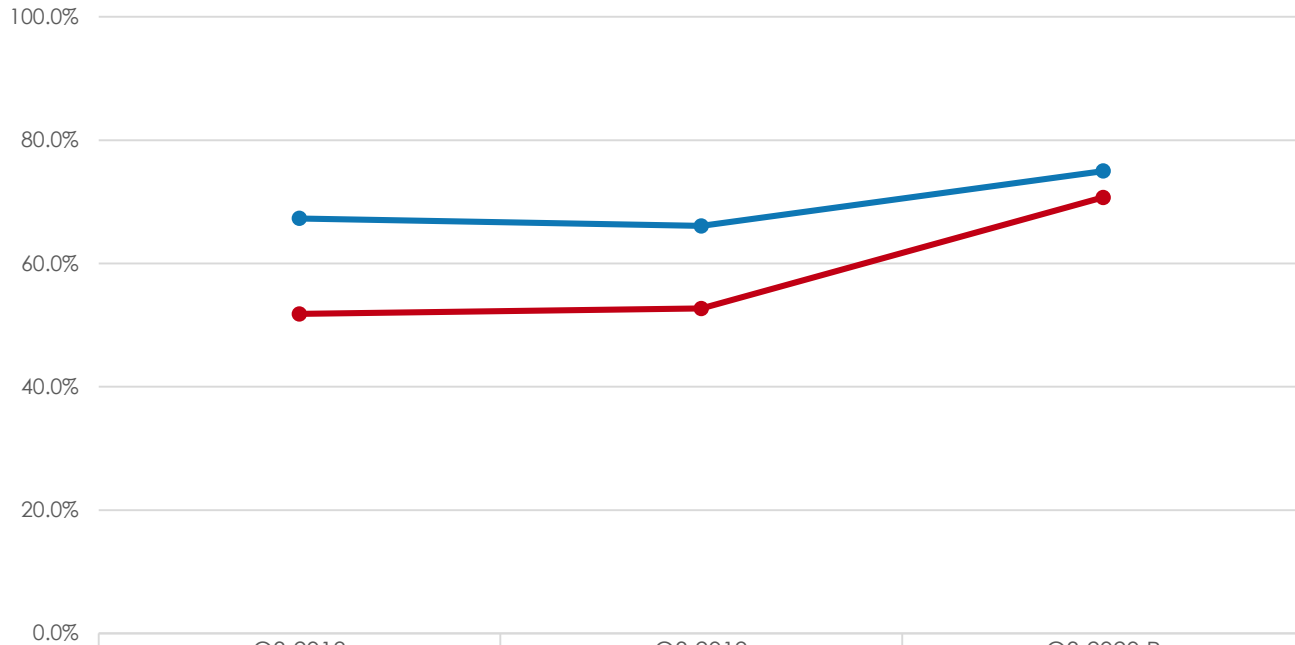


	U.S. West	U.S. East
■ Very likely (7-8)	75.0%	70.7%
■ Somewhat likely (5-6)	12.1%	13.8%
■ Somewhat unlikely (3-4)	3.9%	5.0%
■ Very unlikely (1-2)	7.0%	7.0%
■ Not sure	2.1%	3.6%
BASE	435	418
▲ MEAN	6.97	6.86



# LIKELIHOOD OF RETURN VISIT – O‘AHU

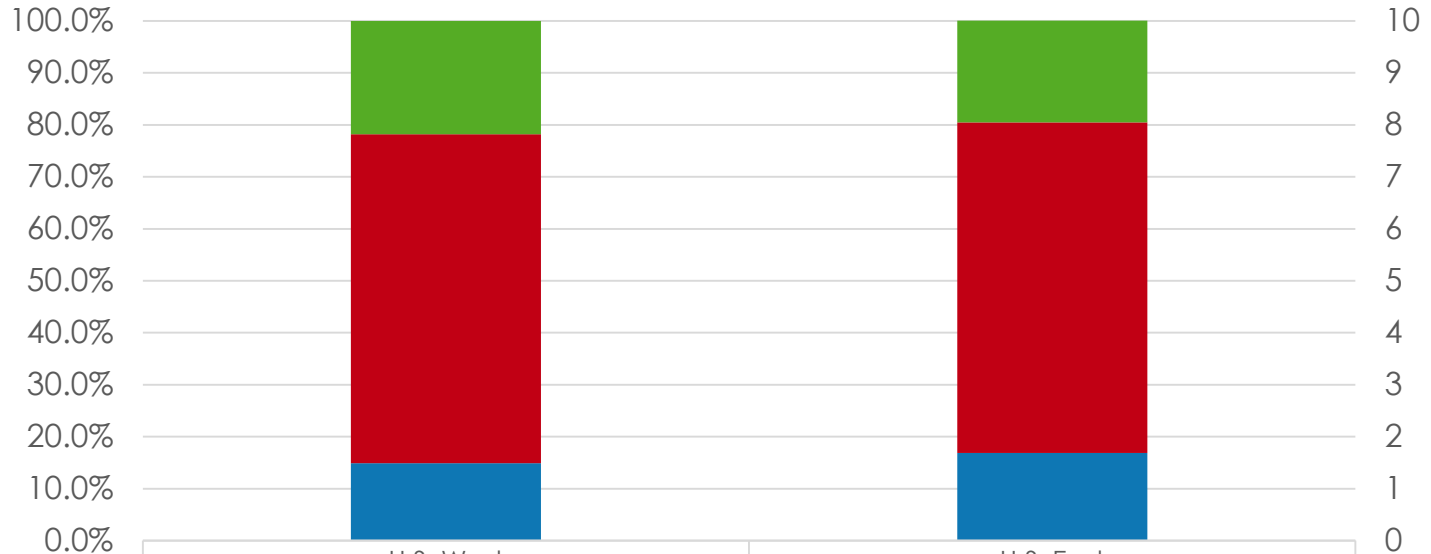
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	67.3%	66.1%	75.0%
U.S. East	51.8%	52.7%	70.7%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
■ Aided Ad Awareness	21.8%	19.6%
■ No Prior Awareness	63.3%	63.6%
■ Unsure	14.9%	16.9%
BASE	436	418

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
<b>Atlantis Submarine &amp; Cruises</b>	0.0%	0.5%
<b>Bernice P. Bishop Museum</b>	1.5%	1.4%
<b>Byodo-In Temple</b>	0.2%	1.8%
<b>Chinatown &amp; Honolulu Art District</b>	4.0%	3.9%
<b>Diamond Head State Monument</b>	5.1%	5.2%
<b>Dole Plantation</b>	1.5%	2.9%
<b>Haleiwa</b>	10.9%	13.3%
<b>Hanauma Bay Nature Reserve</b>	1.9%	1.0%
<b>Harold L. Lyon Arboretum</b>	0.0%	0.5%
<b>Hawai‘i State Art Museum or Honolulu Museum of Art</b>	1.1%	0.5%
<b>Hawaiian Mission Houses, Historic Site and Archive</b>	0.0%	0.0%
<b>Hawai‘i’s Plantation Village</b>	0.8%	0.0%
<b>Honolulu Zoo</b>	3.6%	3.1%

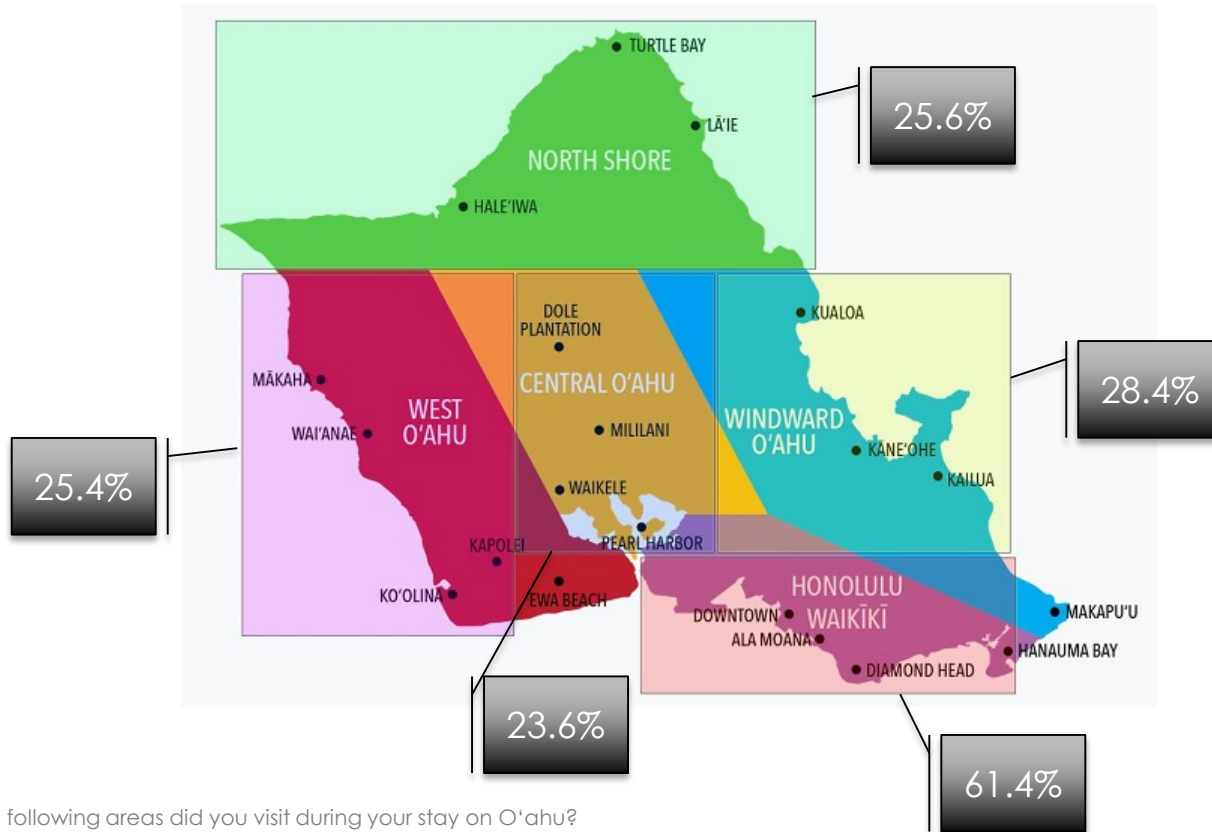
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Ho‘omaluhia Botanical Garden</b>	2.9%	3.3%
<b>Iolani Palace State Monument</b>	1.6%	0.5%
<b>Kaiwi State Scenic Shoreline/ Makapuu Trail</b>	1.9%	4.9%
<b>Kakaako Street Art</b>	1.1%	1.5%
<b>Koko Head Crater Trail</b>	3.1%	4.5%
<b>Kualoa Private Nature Reserve</b>	1.4%	4.8%
<b>Lanikai or Kailua Beach</b>	14.3%	18.2%
<b>Manoa Falls &amp; Trail</b>	1.9%	4.2%
<b>National Memorial Cemetery of the Pacific</b>	1.3%	2.6%
<b>Nuuanu Pali Lookout</b>	2.7%	3.3%
<b>North Shore Beaches</b>	19.2%	25.6%

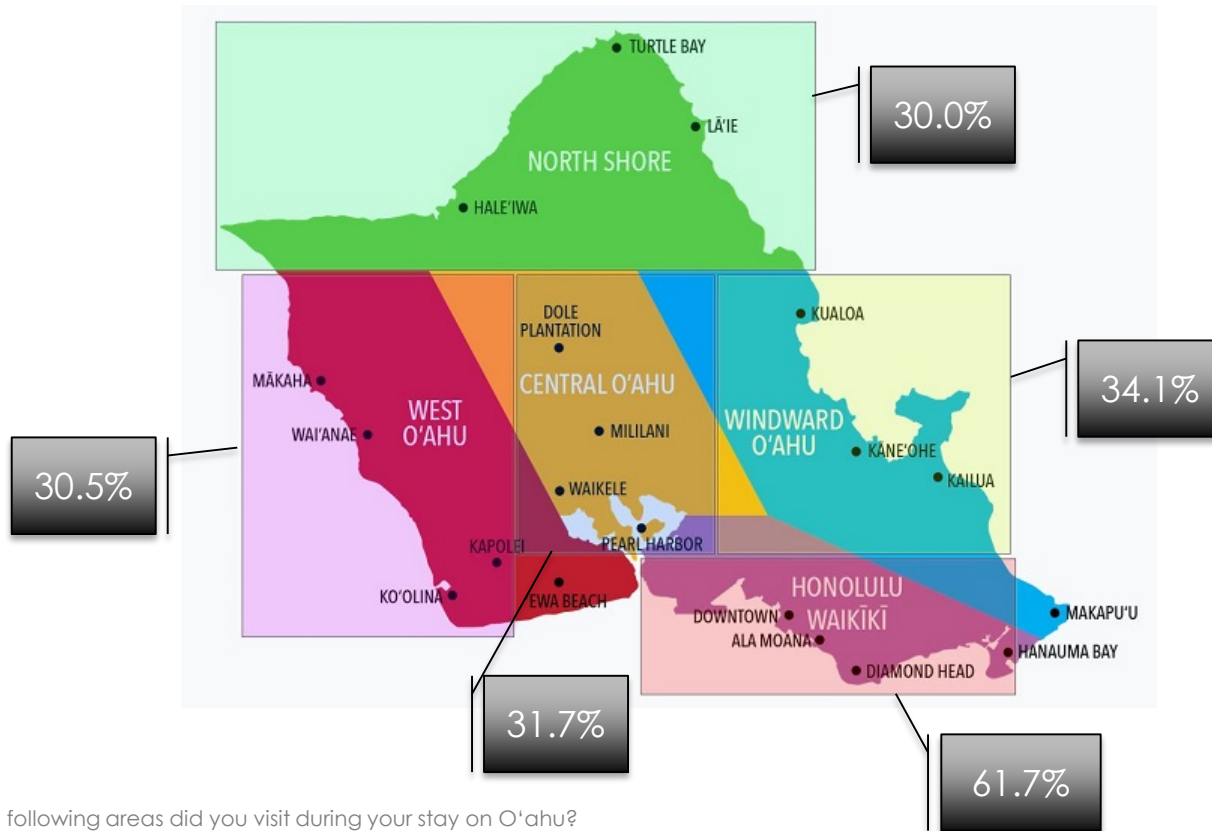
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Pearl Harbor</b>	7.3%	9.1%
<b>Polynesian Cultural Center</b>	0.9%	1.2%
<b>Queen Emma’s Summer Palace</b>	0.0%	0.3%
<b>Sea Life Park Hawai‘i</b>	0.4%	0.2%
<b>Waikiki Aquarium</b>	2.6%	1.0%
<b>Waimanalo Beach Park</b>	6.1%	8.6%
<b>Waimea Valley</b>	6.0%	9.6%

# AREAS VISITED U.S. WEST

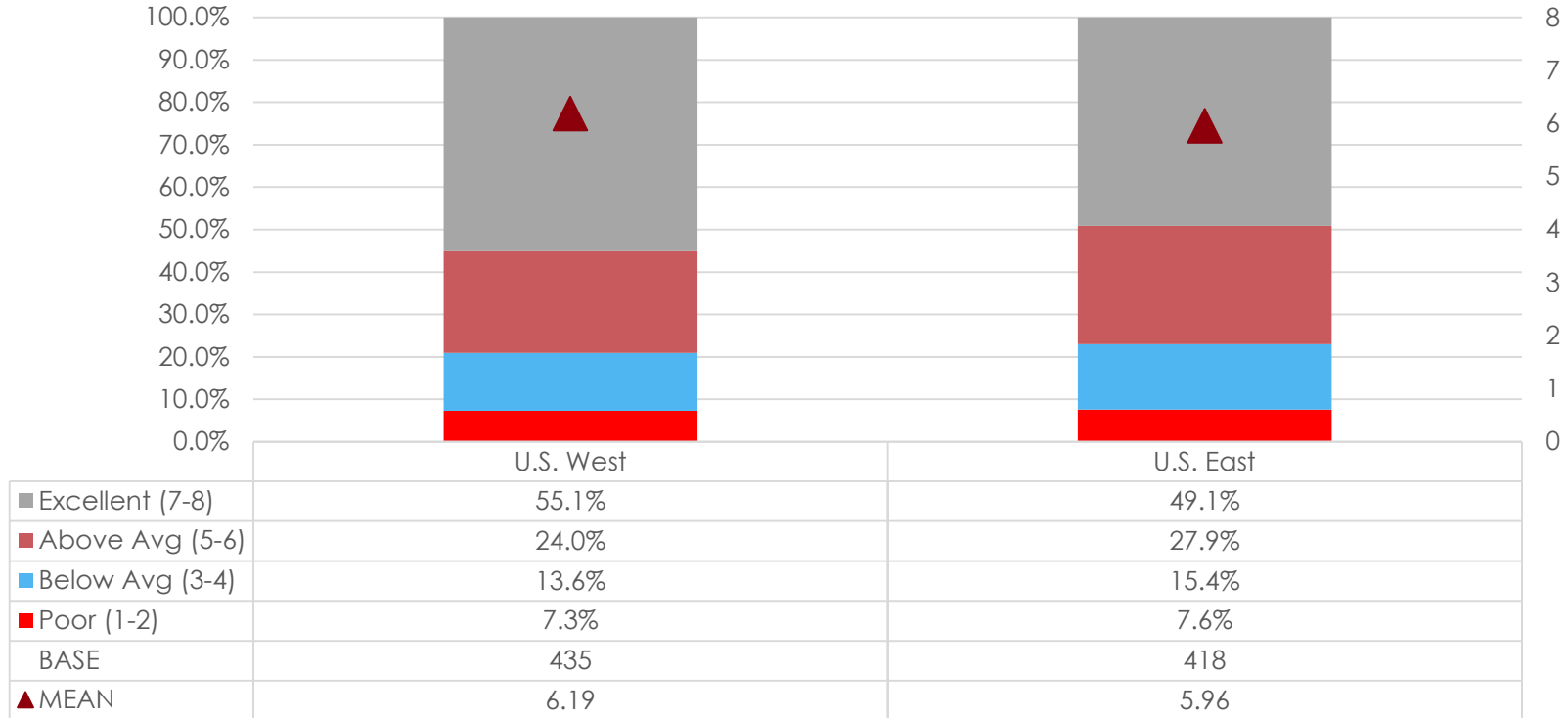


# AREAS VISITED U.S. EAST



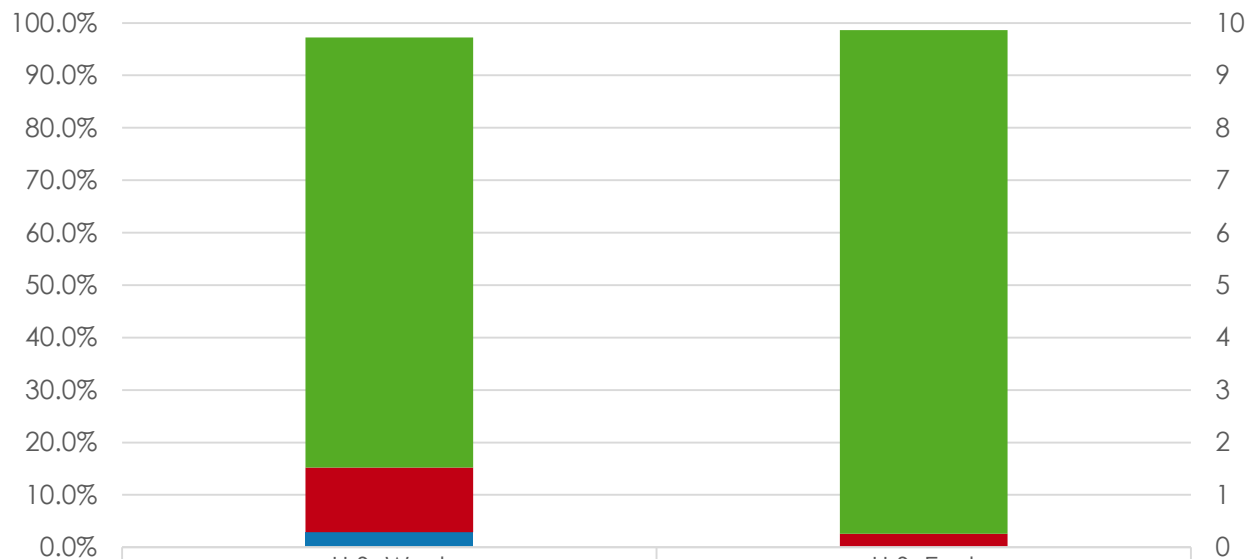
# SATISFACTION – Daniel K. Inouye International Airport

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





# SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
2-Piece, separate mask & snorkel	82.0%	96.0%
Full-face snorkel mask	12.3%	2.6%
Goggles/ Mask, no snorkel	2.9%	0.0%
BASE	63	72

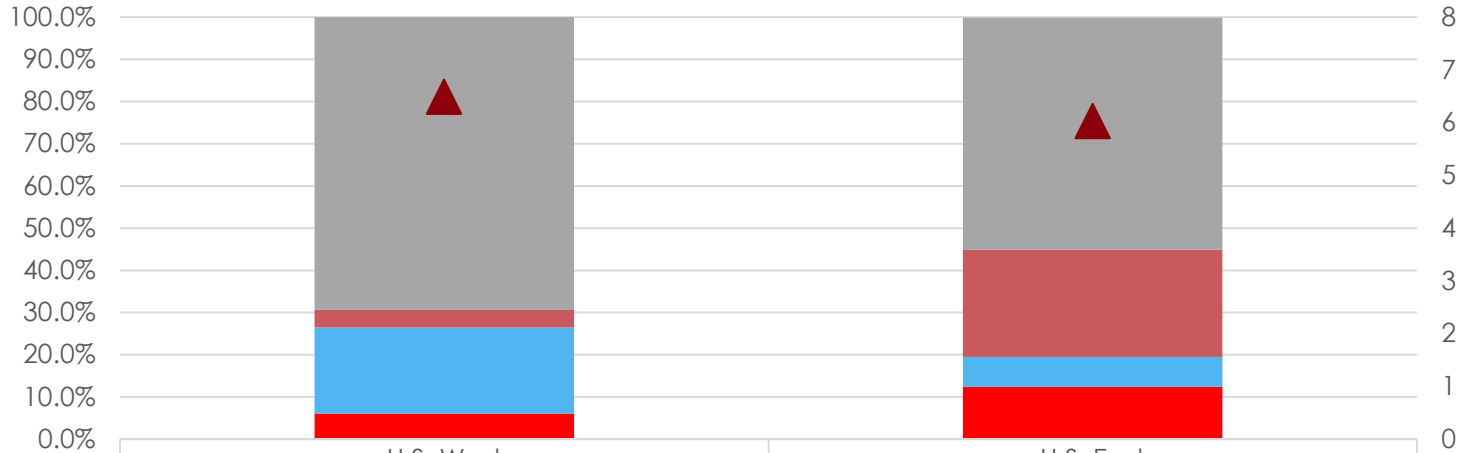
# SNORKELING OCEAN SAFETY – O‘AHU

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	96.3%	97.4%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	2.3%	0.0%
<b>Yes, while doing another type of ocean activity</b>	1.4%	1.3%
<b>BASE</b>	63	72

# SECTION – KAUA‘I

# SATISFACTION – KAUA‘I

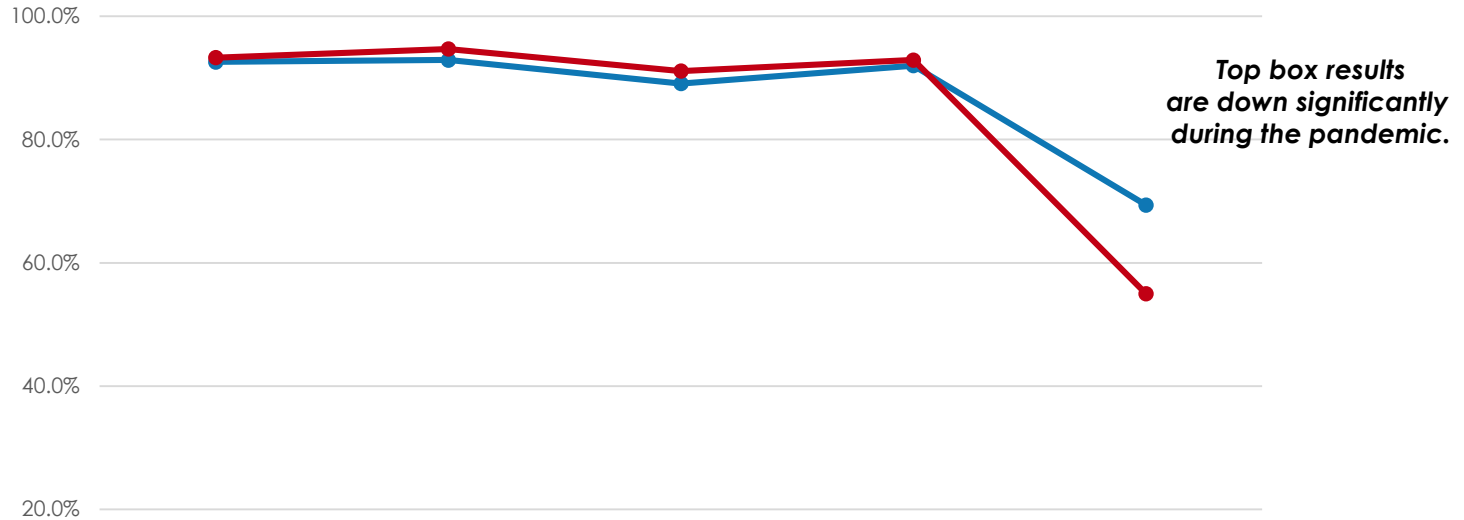
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	69.4%	55.0%
■ Above Avg (5-6)	4.1%	25.4%
■ Below Avg (3-4)	20.4%	7.1%
■ Poor (1-2)	6.1%	12.4%
BASE	49	27
▲ MEAN	6.49	6.03

# SATISFACTION – KAUA‘I

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

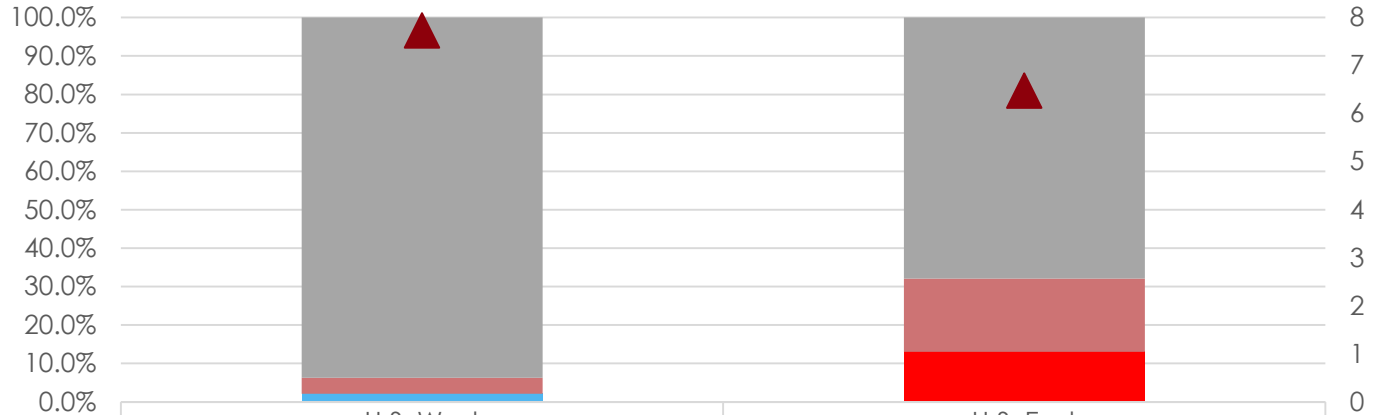


	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	92.6%	92.9%	89.1%	92.0%	69.4%
U.S. East	93.3%	94.7%	91.1%	92.9%	55.0%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

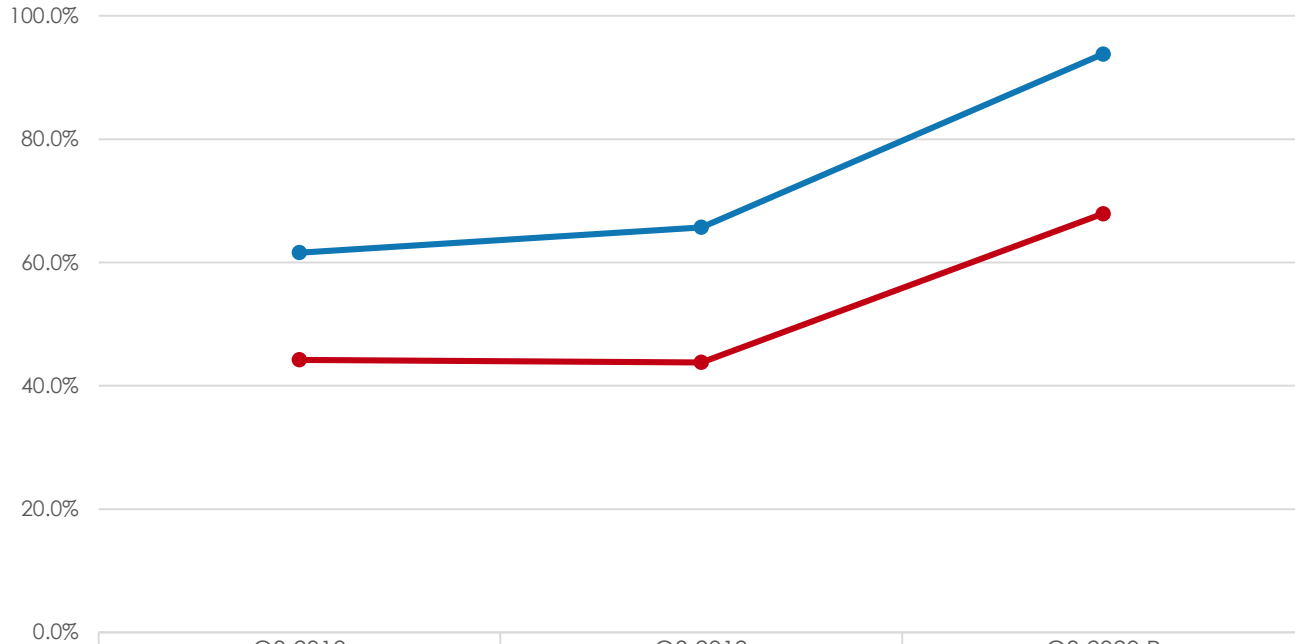
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	93.8%	67.9%
■ Somewhat likely (5-6)	4.2%	19.1%
■ Somewhat unlikely (3-4)	2.1%	0.0%
■ Very unlikely (1-2)	0.0%	13.0%
■ Not sure	0.0%	0.0%
BASE	48	26
▲ MEAN	7.73	6.48

# LIKELIHOOD OF RETURN VISIT – KAUA'I

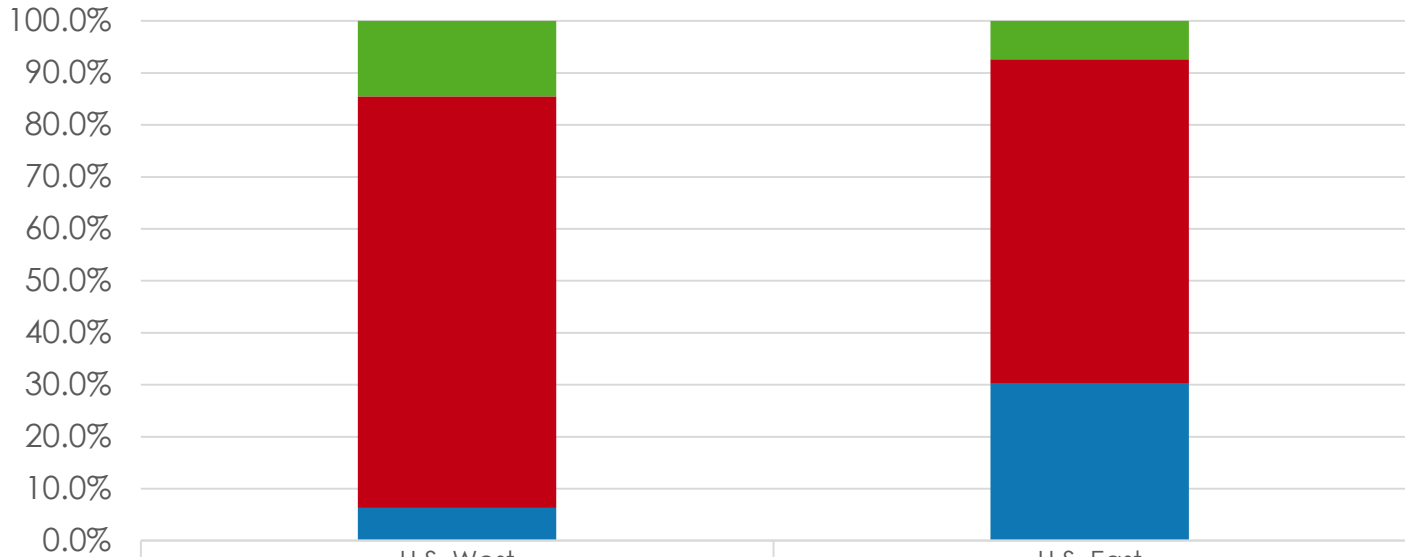
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	61.6%	65.7%	93.8%
U.S. East	44.2%	43.8%	67.9%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East
■ Aided Ad Awareness	14.6%	7.4%
■ No Prior Awareness	79.2%	62.4%
■ Unsure	6.3%	30.2%
BASE	48	26



# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
<b>Fern Grotto</b>	0.0%	0.0%
<b>Hanalei Town</b>	45.8%	27.1%
<b>Hanalei Beach</b>	45.8%	31.0%
<b>Kalalau Trail</b>	12.5%	15.5%
<b>Kalapaki Beach</b>	22.9%	31.6%
<b>Bike Path in Kapaa</b>	14.6%	11.6%
<b>Kaua‘i Museum</b>	2.1%	0.0%
<b>Ke‘e Beach</b>	25.0%	15.5%
<b>Kilauea Lighthouse</b>	12.5%	19.3%
<b>Koke‘e</b>	10.4%	15.5%

## ATTRACTIONS – KAUA‘I (cont.)

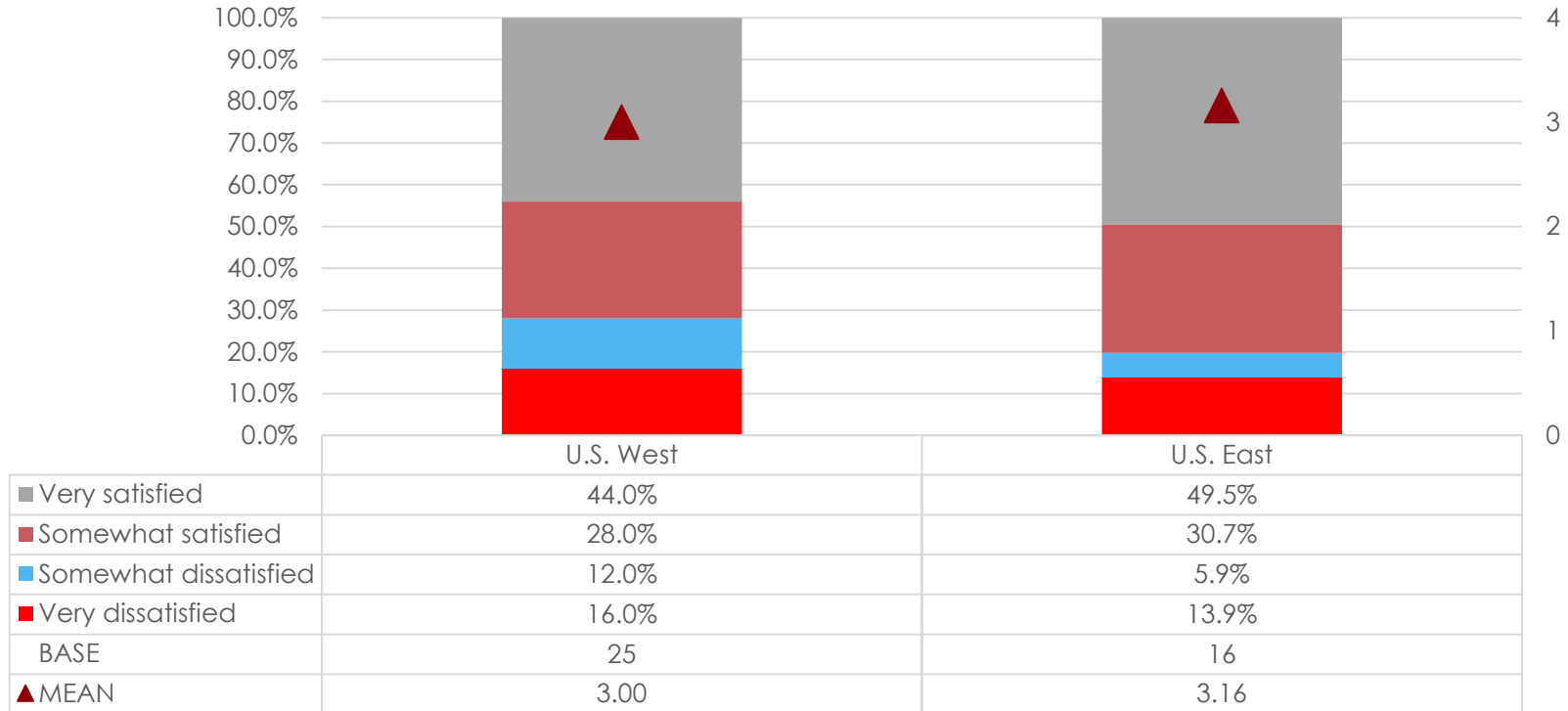
	U.S. West	U.S. East
<b>Koke‘e Museum</b>	2.1%	7.7%
<b>Na Aina Kai Gardens</b>	0.0%	3.9%
<b>Napali Coast</b>	18.8%	11.6%
<b>Allerton Garden</b>	4.2%	11.6%
<b>Limahuli Garden</b>	6.3%	11.6%
<b>Old Koloa Town</b>	22.9%	19.3%
<b>Opaeka‘a Falls</b>	14.6%	15.5%
<b>Po‘ipu Beach</b>	39.6%	38.7%
<b>Smith's Tropical Paradise Gardens</b>	0.0%	3.9%
<b>Spouting Horn</b>	25.0%	23.9%
<b>Wailua Falls</b>	16.7%	31.0%

## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	14.6%	3.9%
Waimea Canyon	25.0%	31.6%
Disc Golf	0.0%	0.0%
Mini Golf	2.1%	7.7%

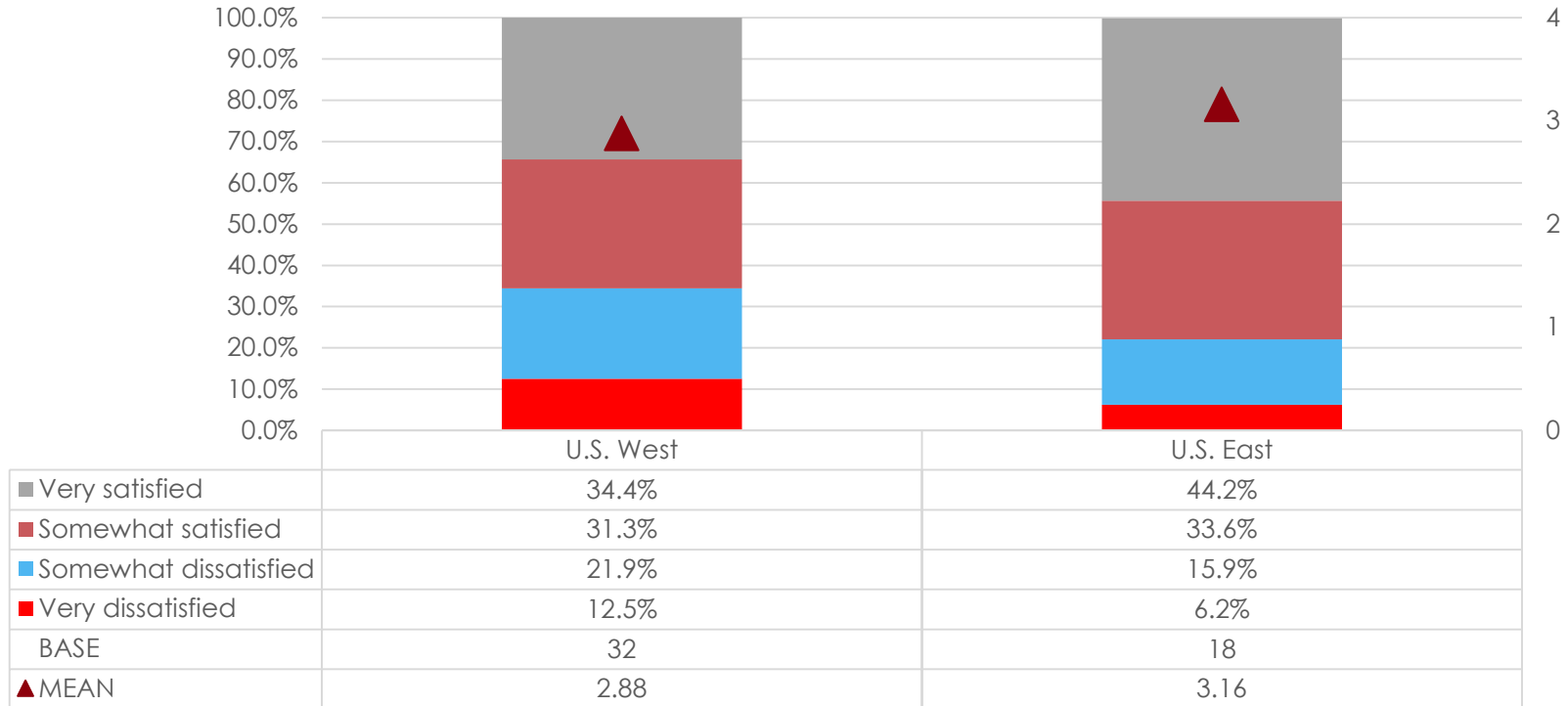
# SATISFACTION – ENTERTAINMENT

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



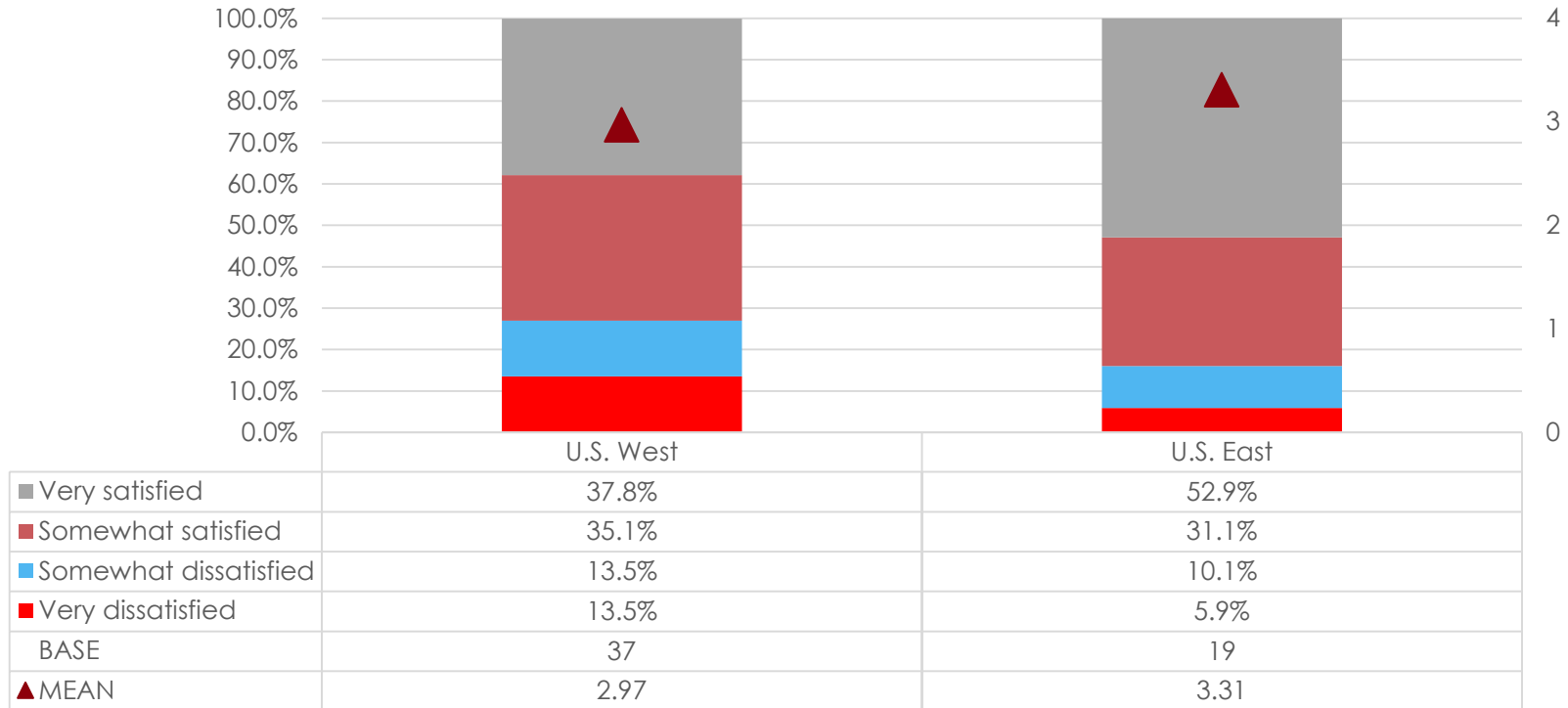
# SATISFACTION – SHOPPING

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



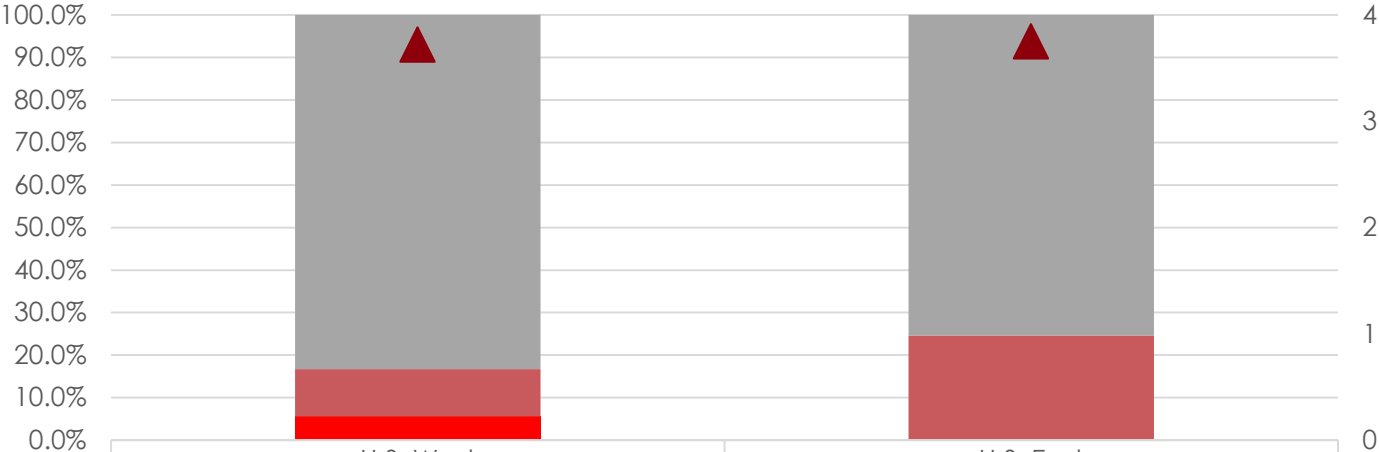
# SATISFACTION – DINING

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



# SATISFACTION – BEACHES

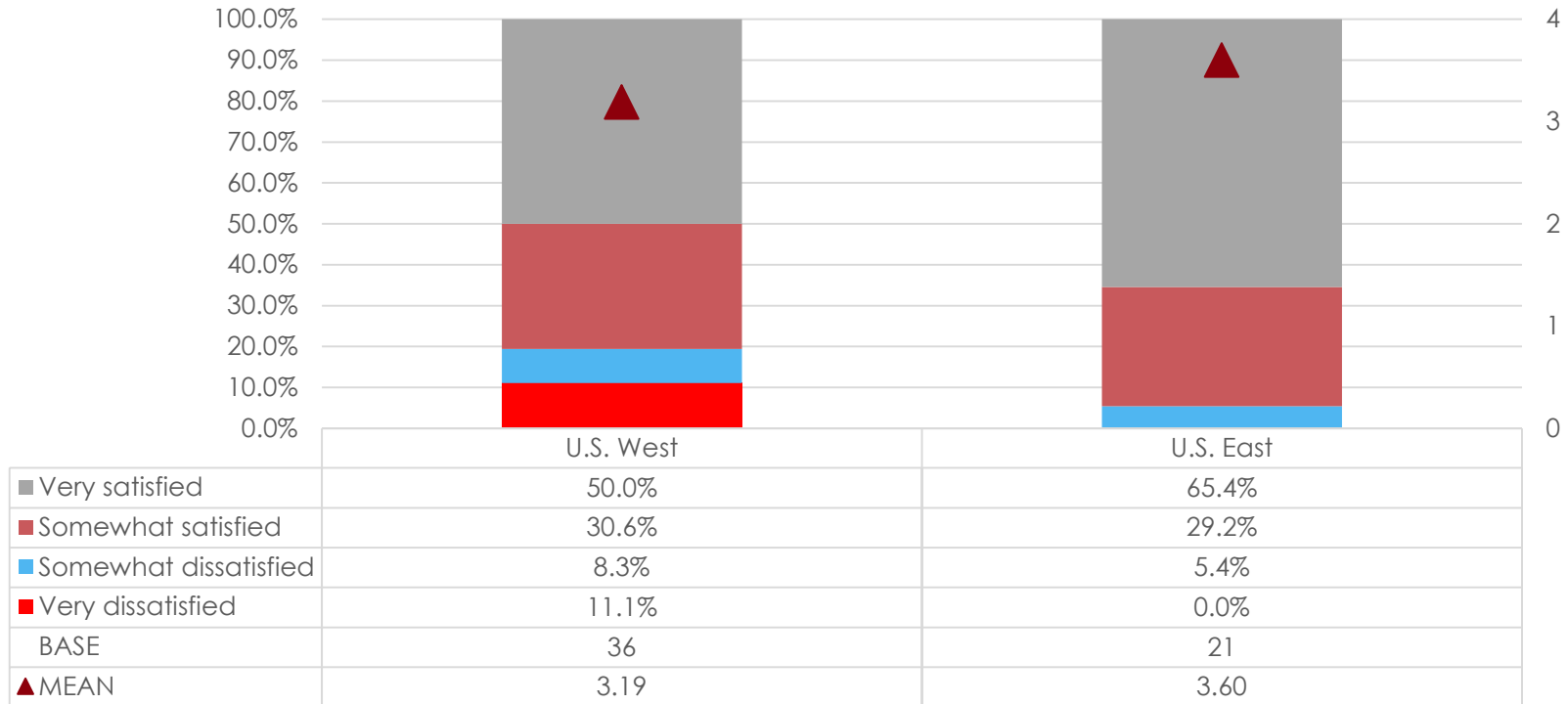
4-pt Rating Scale  
 4=Very Satisfied / 1=Very Dissatisfied



	U.S. West	U.S. East
Very satisfied	83.3%	75.4%
Somewhat satisfied	11.1%	24.6%
Somewhat dissatisfied	0.0%	0.0%
Very dissatisfied	5.6%	0.0%
BASE	36	21
MEAN	3.72	3.75

# SATISFACTION – PUBLIC AREAS

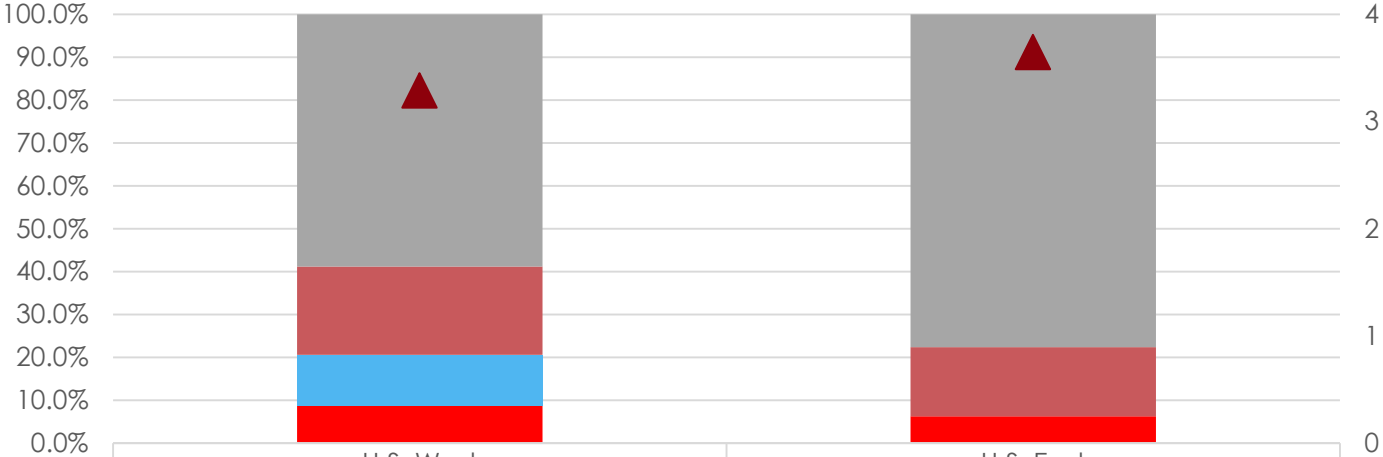
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied





# SATISFACTION – PARKS

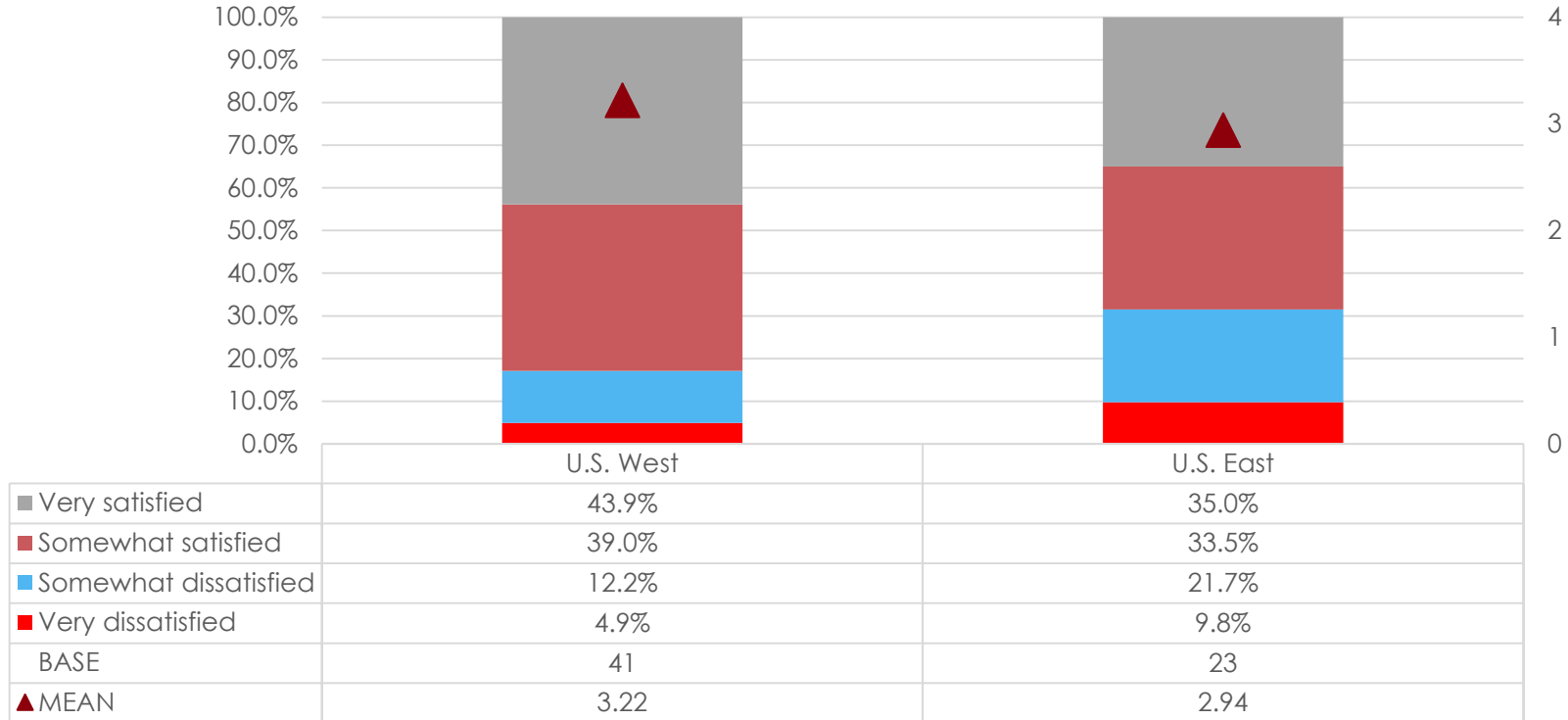
4-pt Rating Scale  
 4=Very Satisfied / 1=Very Dissatisfied



	U.S. West	U.S. East
Very satisfied	58.8%	77.7%
Somewhat satisfied	20.6%	16.1%
Somewhat dissatisfied	11.8%	0.0%
Very dissatisfied	8.8%	6.3%
BASE	34	18
MEAN	3.29	3.65

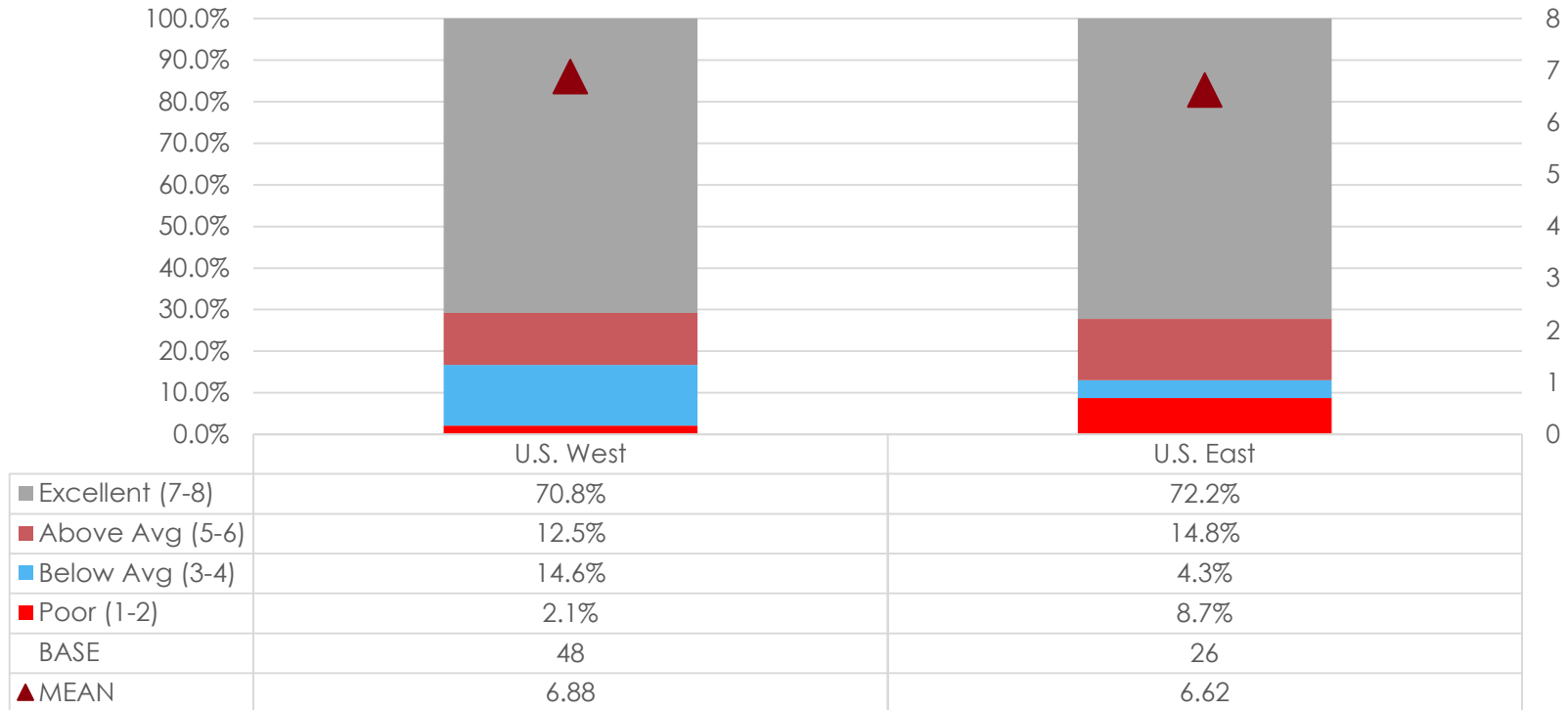
# SATISFACTION – ROADS

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
<b>Been here before</b>	52.1%	18.5%
<b>Visiting Family/ Friends</b>	18.8%	25.9%
<b>Business related</b>	18.8%	19.1%
<b>Friend recommendation</b>	8.3%	24.1%
<b>Have timeshare/Have property/Renting</b>	2.1%	3.7%
<b>Affordability / Value/ Cost</b>	0.0%	4.3%
<b>Attending conference/ event</b>	0.0%	4.3%

# SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	100.0%	100.0%
■ Full-face snorkel mask	0.0%	0.0%
■ Unsure	0.0%	0.0%
BASE	12	6

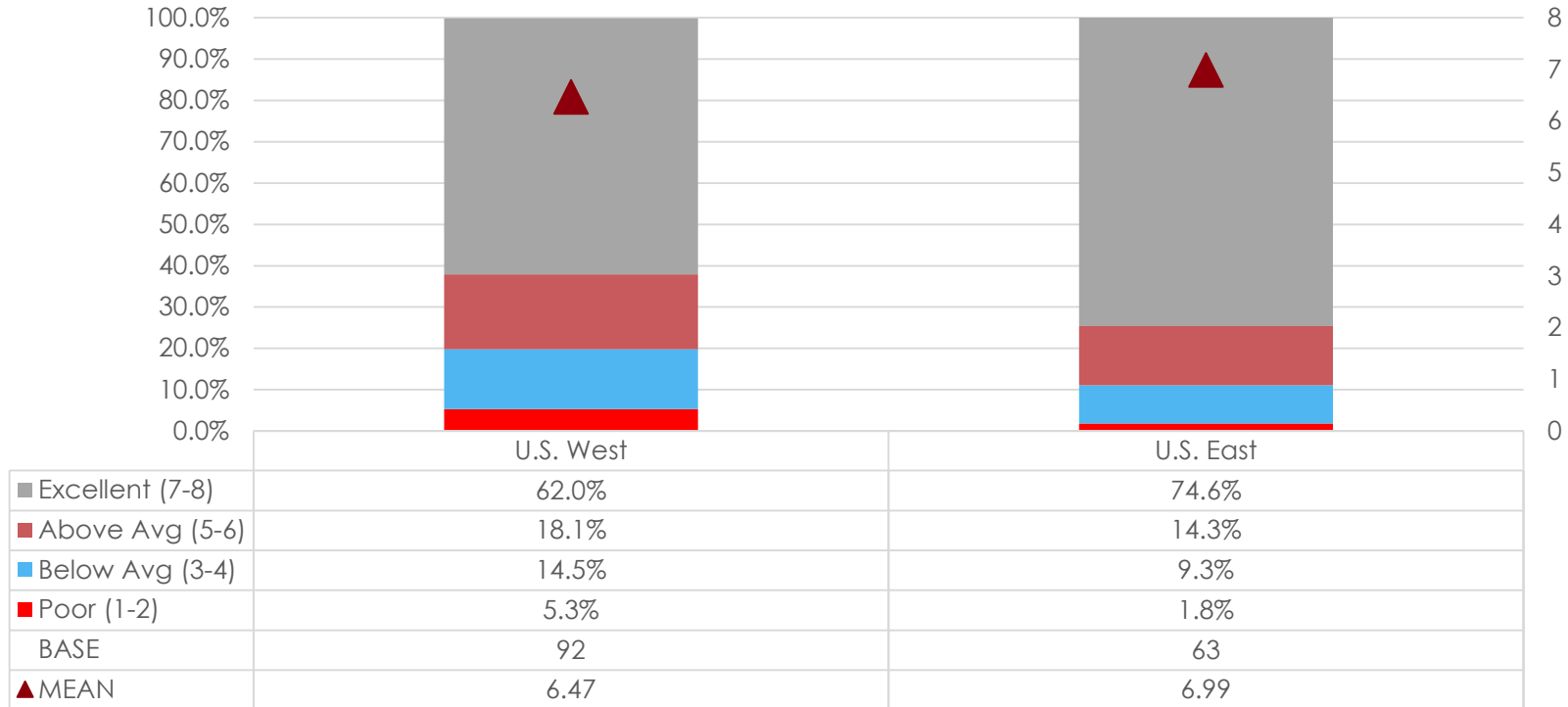
# SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	91.7%	100.0%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	8.3%	0.0%
<b>BASE</b>	12	6

# SECTION – MAUI

# SATISFACTION – MAUI

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



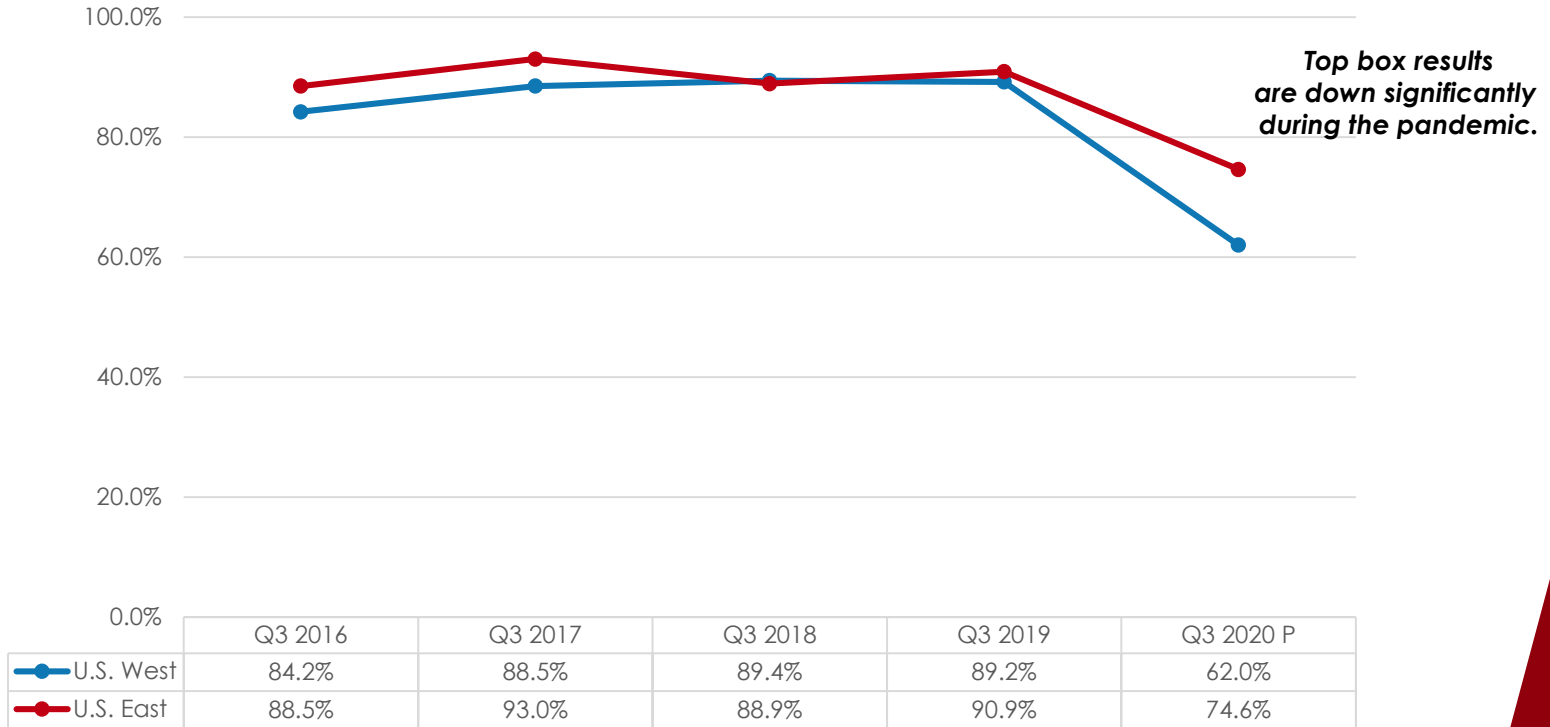


# SATISFACTION – MAUI

- **Age:** Travelers from U.S West under the age of 50 were the most satisfied with their stay, with satisfaction slowly declining with age.
- **Household income:** Less affluent travelers to Maui from U.S. West (those who live in homes with combined incomes below \$100K) were more satisfied with their stay on Maui than were more affluent travelers to the island.
- **Islands visited:** Visitors from U.S. West whose entire trip was spent on Maui were more satisfied with the island compared to those who visited multiple islands during their stay.

# SATISFACTION – MAUI

## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – MAUI

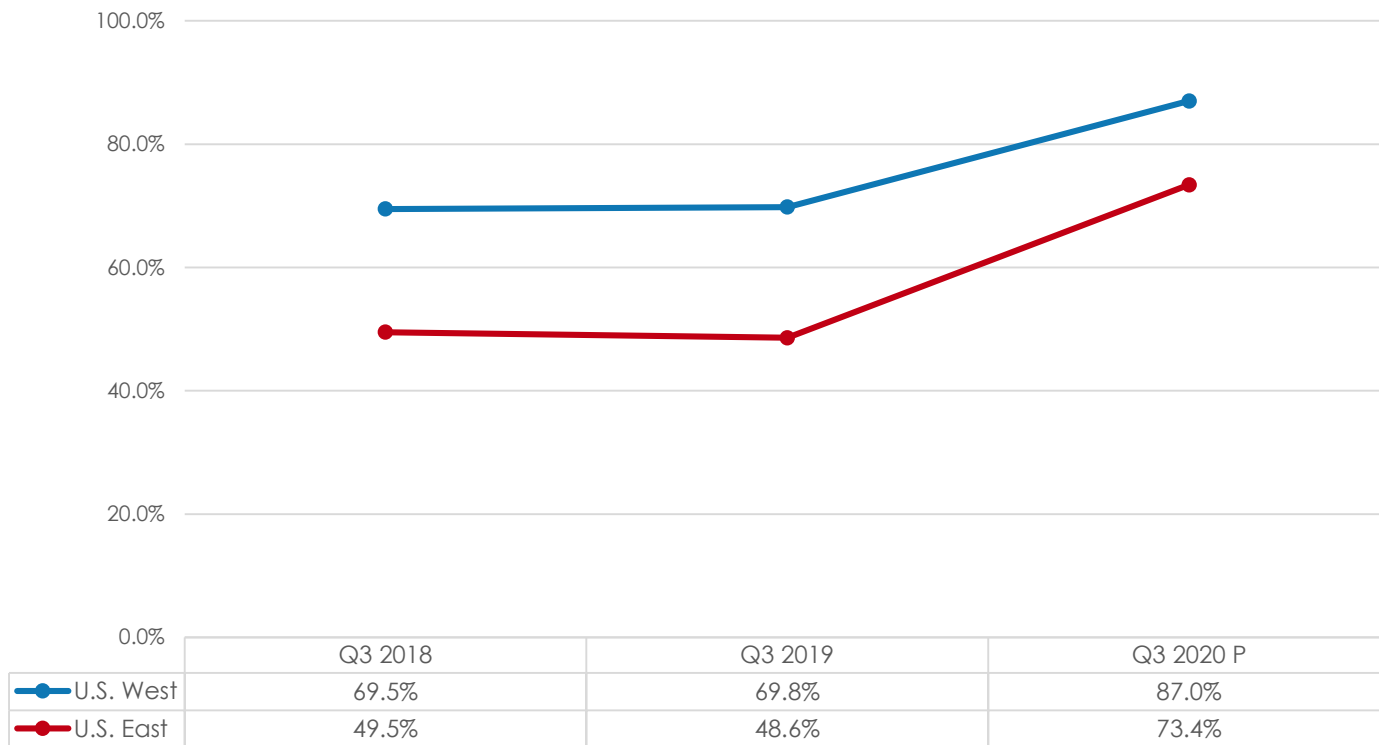
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	87.0%	73.4%
Somewhat likely (5-6)	6.3%	9.7%
Somewhat unlikely (3-4)	1.1%	6.9%
Very unlikely (1-2)	2.3%	10.0%
Not sure	3.4%	0.0%
BASE	87	62
MEAN	7.56	6.76

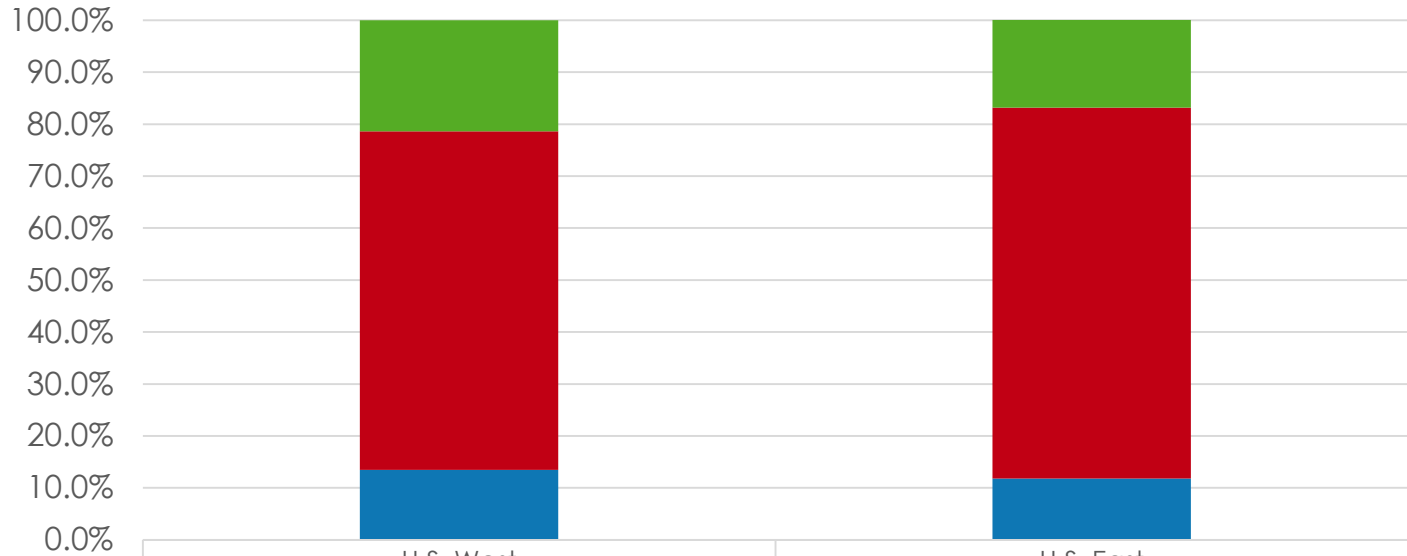
# LIKELIHOOD OF RETURN VISIT – MAUI

TOP BOX – VERY LIKELY (7-8)



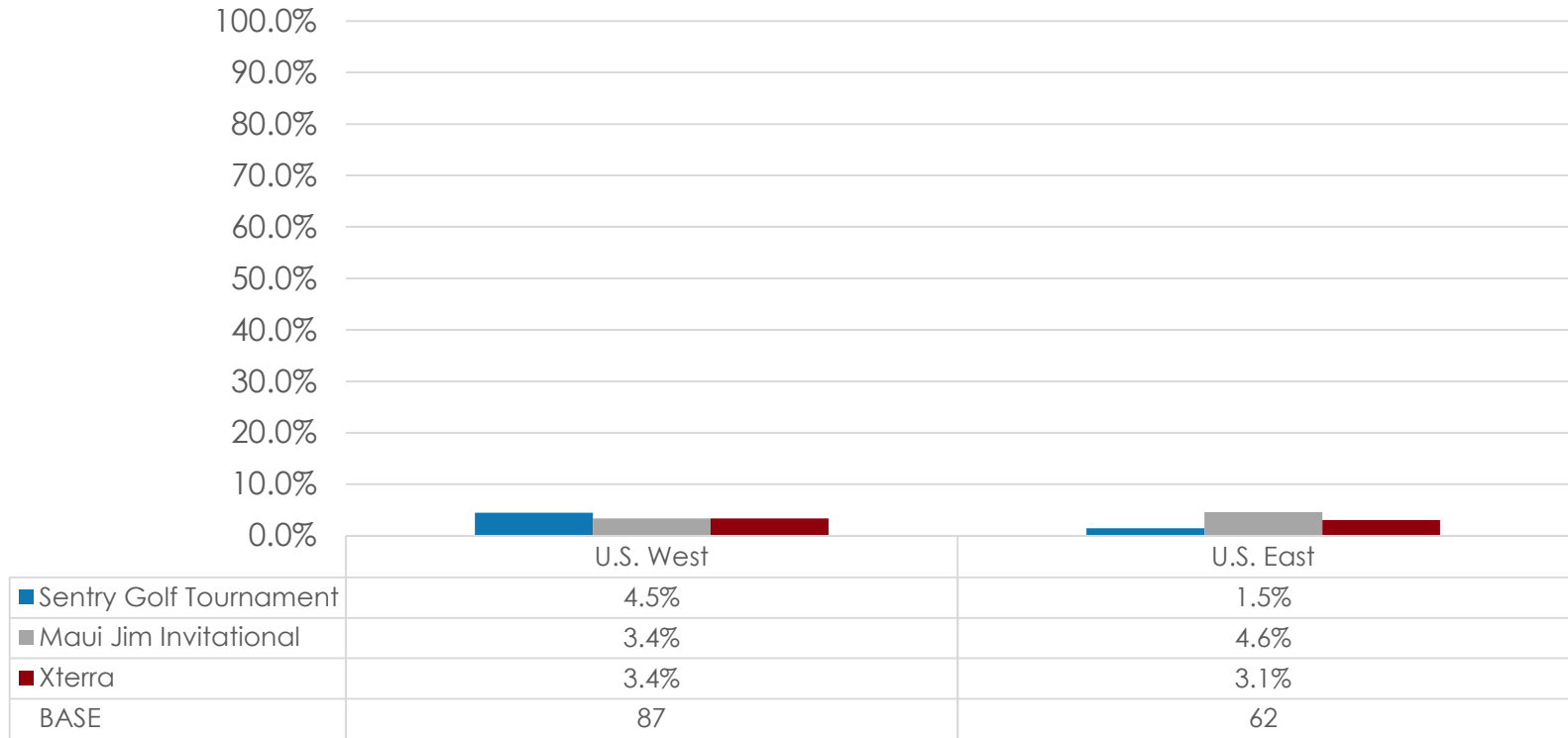
P= Preliminary Data

# AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	21.4%	16.9%
■ No Prior Awareness	65.1%	71.4%
■ Unsure	13.5%	11.8%
BASE	87	62

# AIDED ADVERTISING AWARENESS – MAUI EVENTS



## MOTIVATING FACTORS – MAUI

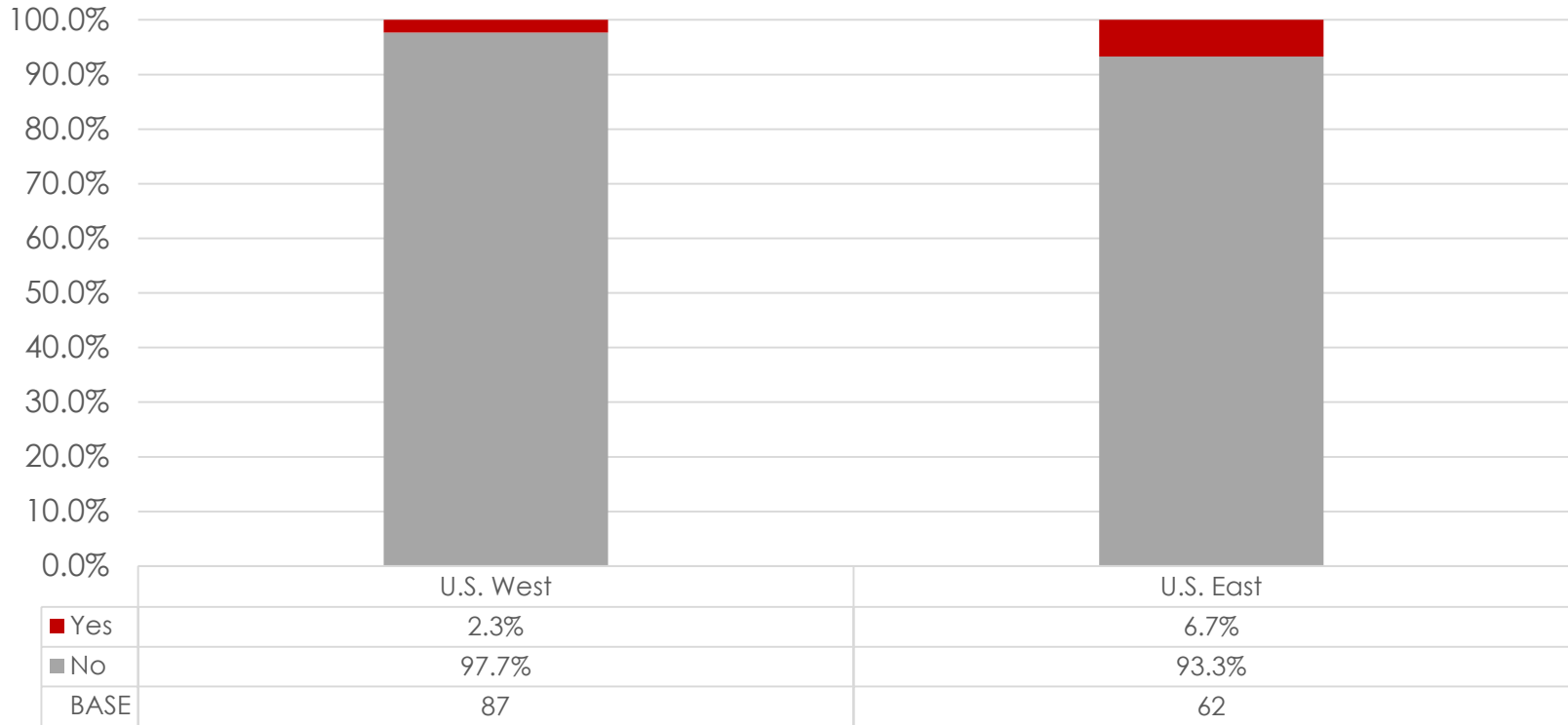
	U.S. West	U.S. East
<b>None of these</b>	78.6%	77.0%
<b>Outdoor or sporting activities and events</b>	14.7%	16.1%
<b>Hawaiian cultural events</b>	9.0%	6.7%
<b>Social media posts and videos</b>	5.6%	5.1%
<b>Hawaiian Music</b>	6.8%	4.9%
<b>TV programs/ Movies filmed in Hawai'i</b>	3.4%	6.4%

# ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	0.0%	1.6%
Aquarium Maui /Maui Ocean Center	0.0%	4.9%
Baldwin Missionary Home Museum	1.2%	1.6%
Hale Pa'i Printing House	0.0%	1.6%
Haleakala National Park	19.1%	26.8%
Haleki'i-Pihana Heiau State Monument	2.4%	3.4%
Hana Cultural Center	4.7%	13.8%
'Iao Valley State Monument	8.3%	9.9%
Kepaniwai Park & Heritage Gardens	6.6%	8.9%
Kula Botanical Garden	4.2%	8.6%
Maui Historical Society Bailey House Museum	2.4%	3.4%
Whaler's Village Museum	0.0%	1.6%
Wo Hing Temple Museum	1.2%	5.2%



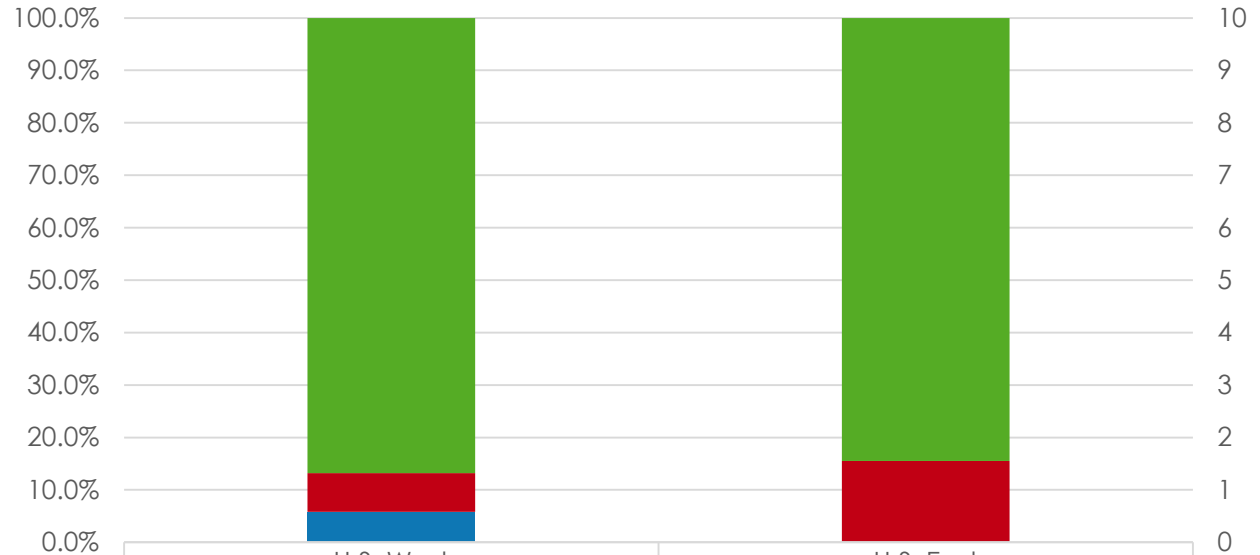
# VISITED MAUI FOR SPECIFIC EVENT



## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Wedding/ honeymoon/ Anniversary/ Birthday/ Funeral	50.0%	46.1%
Other	50.0%	27.0%
Maui Marathon	0.0%	27.0%
BASE	2	4

# SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	86.8%	84.5%
■ Full-face snorkel mask	7.4%	15.5%
■ Both	5.8%	0.0%
BASE	26	20

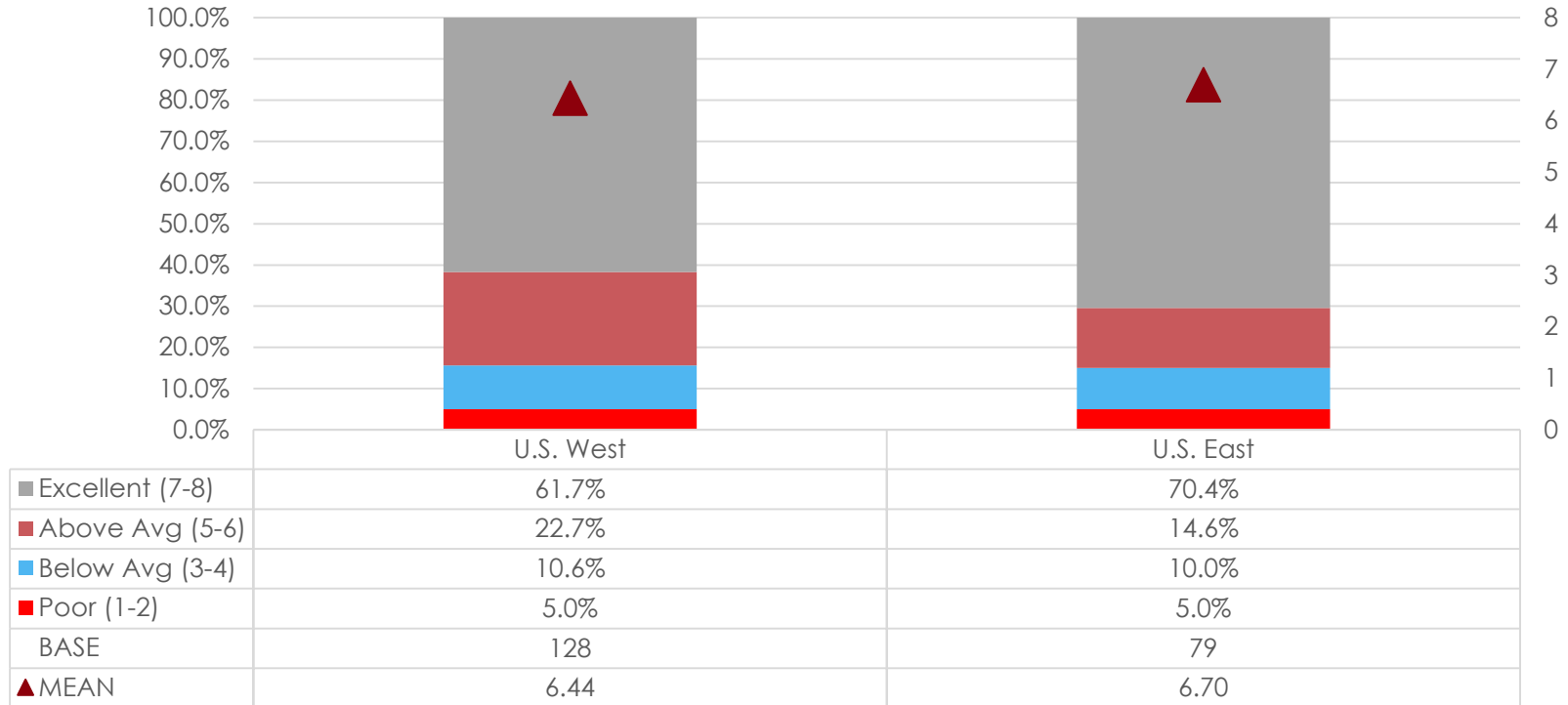
# SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	100.0%	100.0%
<b>BASE</b>	26	20

# SECTION – ISLAND OF HAWAI‘I

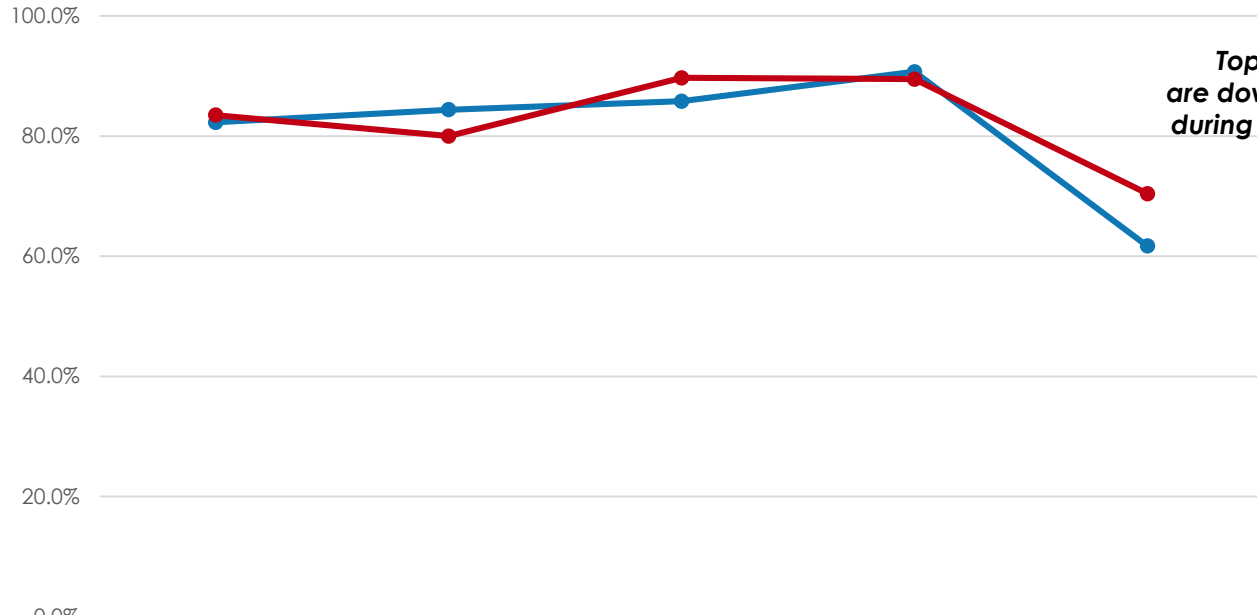
# SATISFACTION – ISLAND OF HAWAI‘I

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



# SATISFACTION – ISLAND OF HAWAI‘I

## TOP BOX – EXCELLENT (7-8)



**Top box results  
are down significantly  
during the pandemic.**

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020 P
U.S. West	82.3%	84.4%	85.8%	90.7%	61.7%
U.S. East	83.5%	80.0%	89.7%	89.5%	70.4%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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

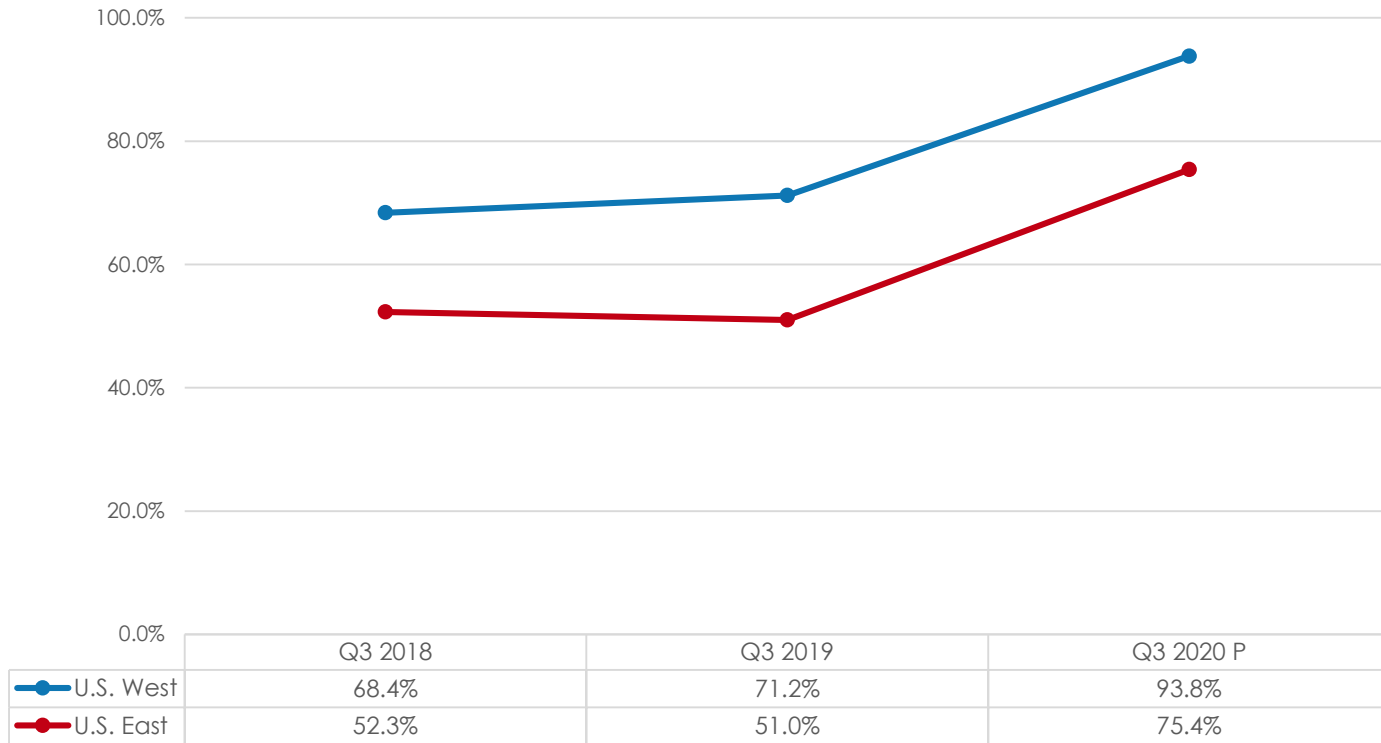


	U.S. West	U.S. East
■ Very likely (7-8)	93.8%	75.4%
■ Somewhat likely (5-6)	2.3%	10.2%
■ Somewhat unlikely (3-4)	0.8%	4.3%
■ Very unlikely (1-2)	2.3%	7.7%
■ Not sure	0.8%	2.4%
BASE	124	78
▲ MEAN	7.69	6.91



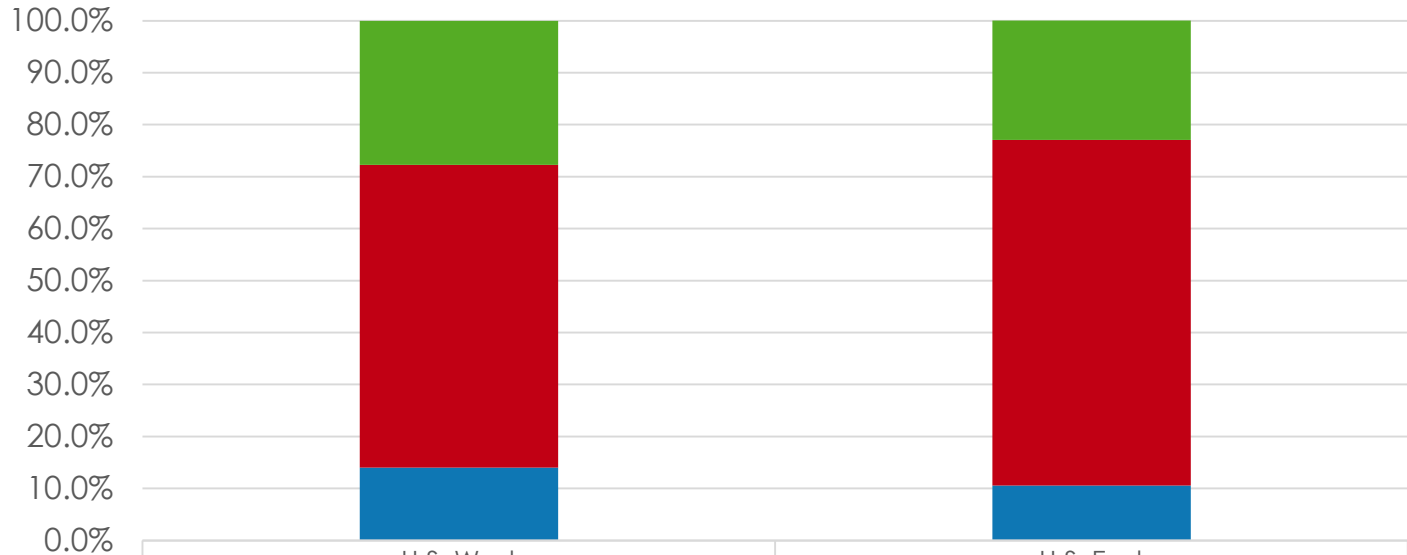
# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	27.7%	23.0%
■ No Prior Awareness	58.3%	66.5%
■ Unsure	14.0%	10.6%
BASE	124	78

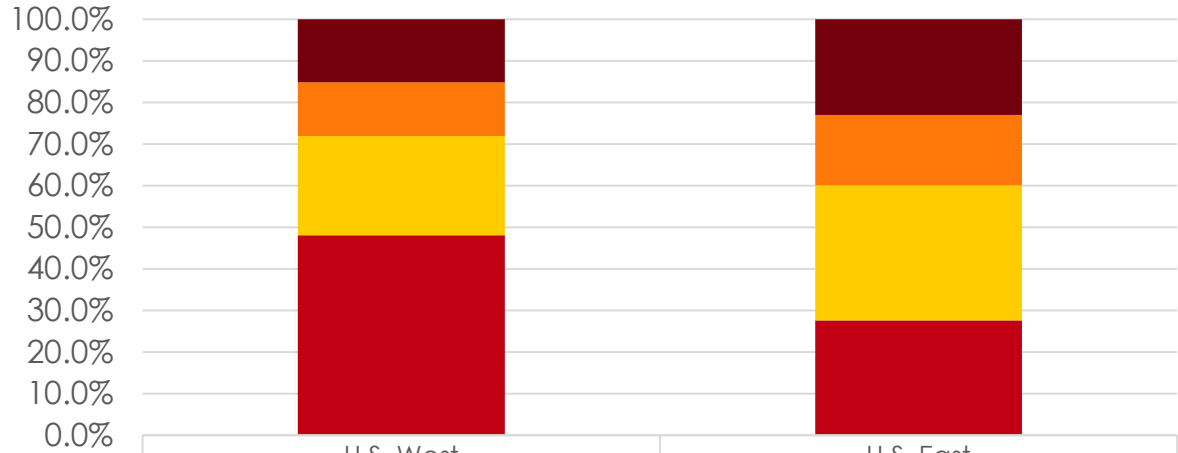
# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	8.4%	10.3%
Botanical Gardens	4.8%	7.0%
H.N. Greenwell Store	1.6%	0.0%
Hawai'i Volcanoes National Park	25.7%	42.4%
Hilo Farmers Market	15.7%	26.6%
Hulihe'e Palace	0.8%	0.0%
'Imiloa Astronomy Ctr	0.8%	0.0%
Kaloko-Honokohau National Historical Park	1.6%	2.7%
Kona Coffee Living History Farm	5.2%	5.5%
Lili'uokalani Park and Garden	5.6%	9.5%

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

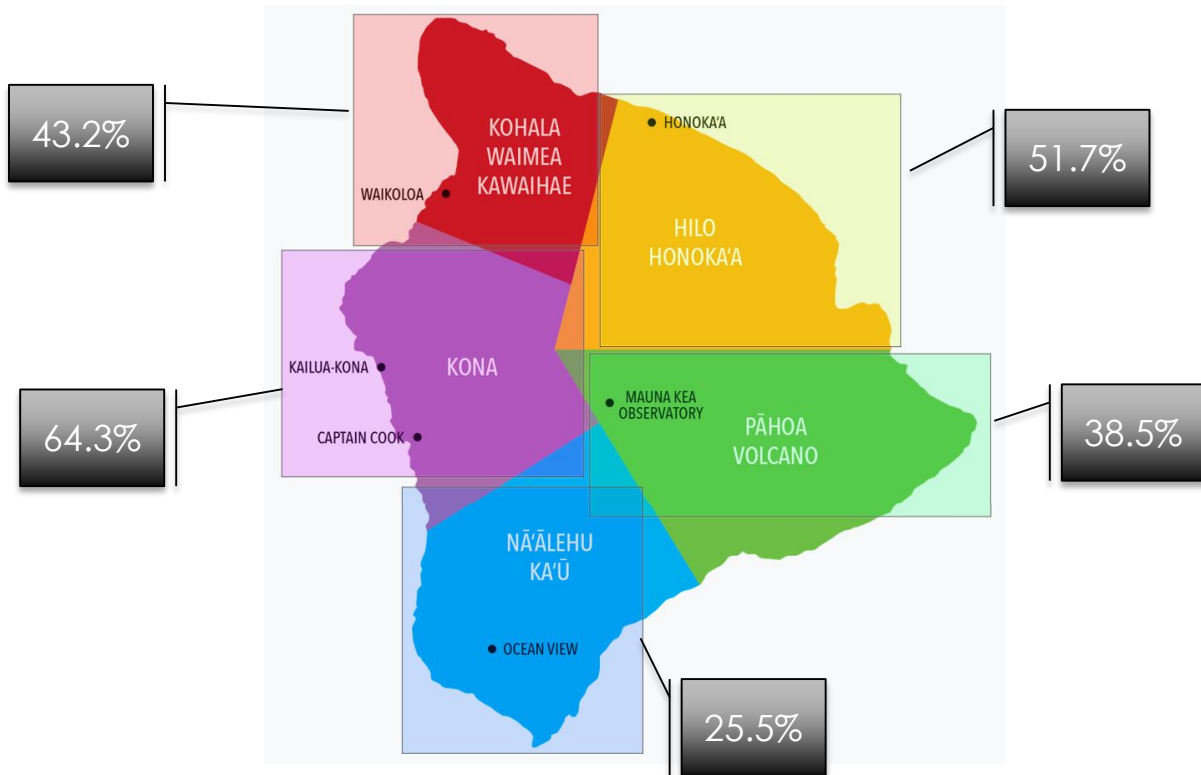
	U.S. West	U.S. East
<b>Lyman House Memorial Museum</b>	0.0%	0.0%
<b>Maunakea</b>	7.6%	17.9%
<b>Orchid Farm</b>	0.0%	1.3%
<b>Pacific Tsunami Museum</b>	0.0%	0.0%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	1.6%	2.7%
<b>Pu'uuhonua o Honaunau National Historical Park</b>	6.4%	16.2%
<b>Pu'ukohola Heia National Historical Site</b>	1.6%	4.2%
<b>Punalu'u Black Sand Beach</b>	9.7%	31.7%
<b>Rainbow Falls</b>	10.9%	20.3%
<b>Volcano Art Center</b>	3.6%	7.8%

# TRAVEL ON ISLAND OF HAWAI'I

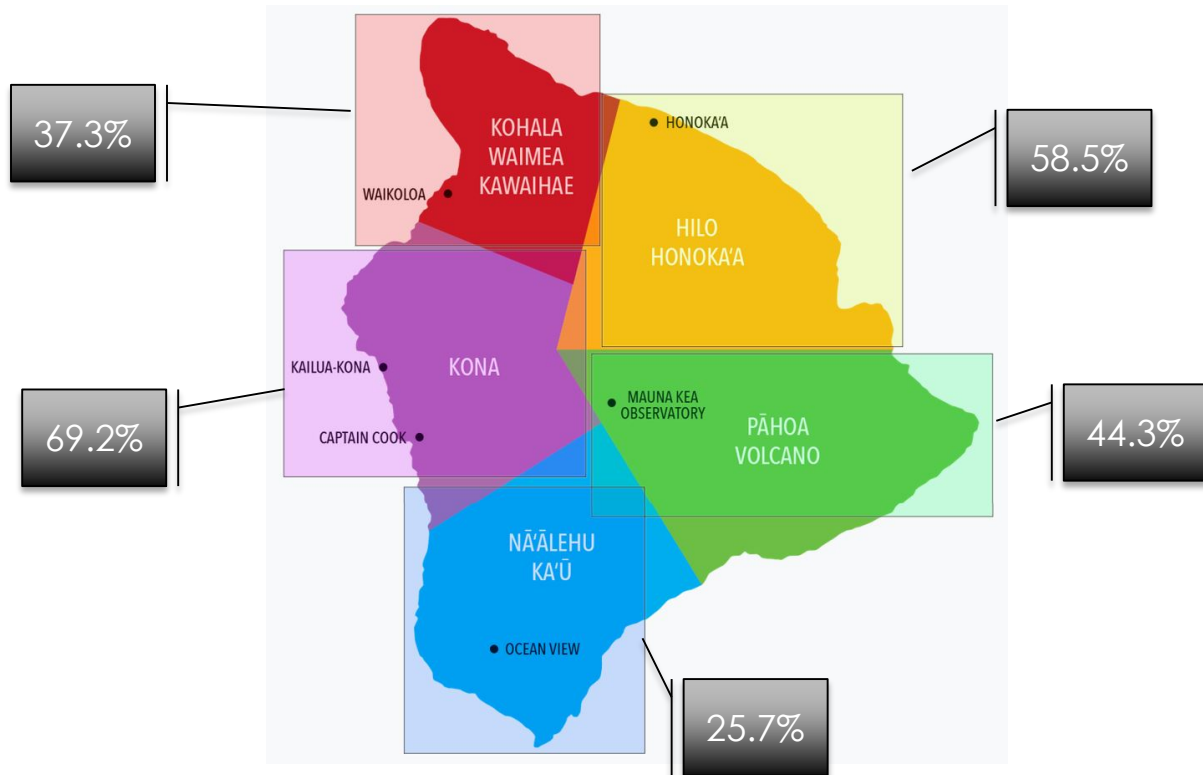


	U.S. West	U.S. East
■ Traveled to other side of island	15.2%	23.0%
■ Traveled more than 1 hour one way to reach activities	12.9%	16.9%
■ Traveled 1 hour or less one way to reach activity	23.8%	32.5%
■ Enjoy activities- short drive from accommodations	48.1%	27.6%
● BASE	124	78

# AREAS VISITED U.S. WEST



# AREAS VISITED U.S. EAST



# SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



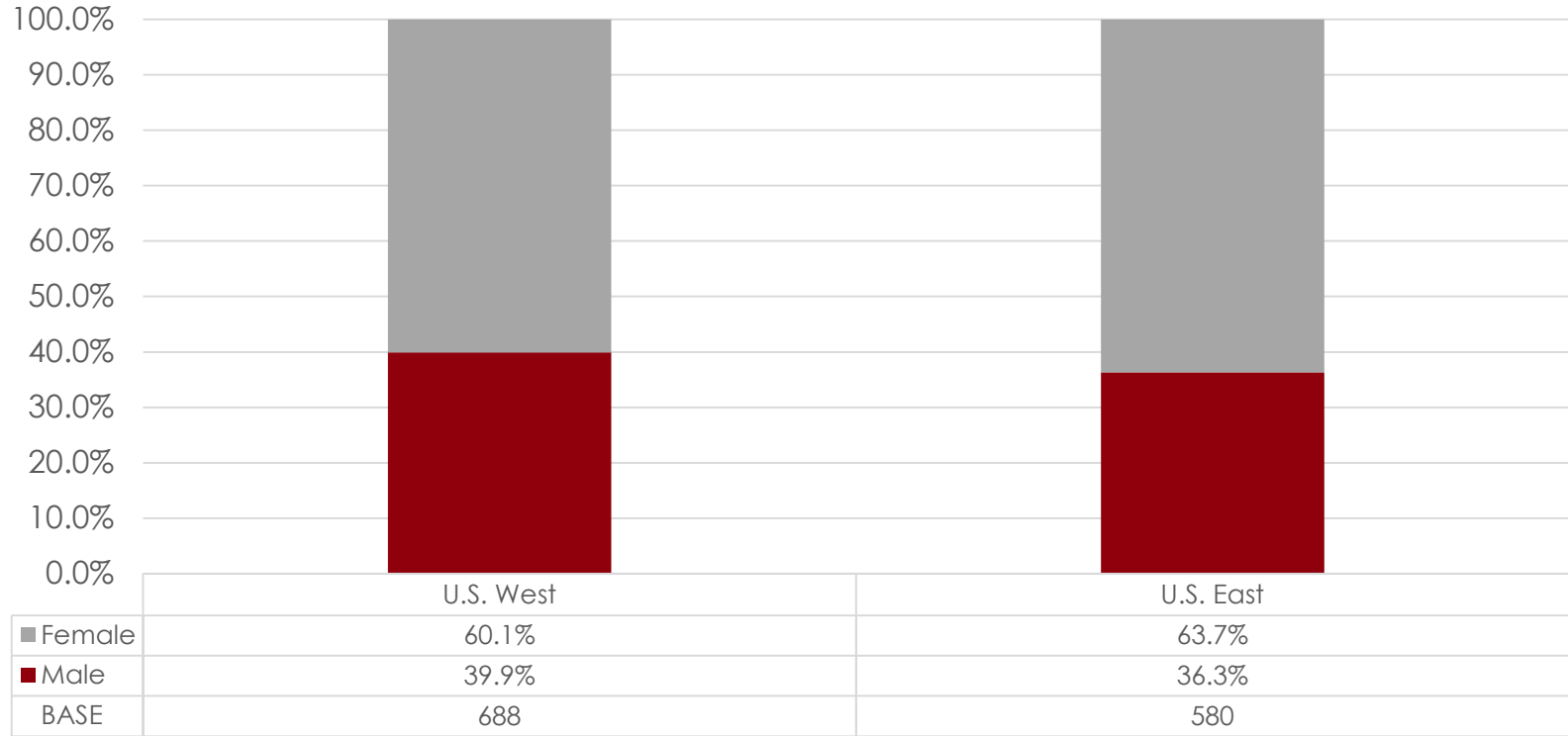


# SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

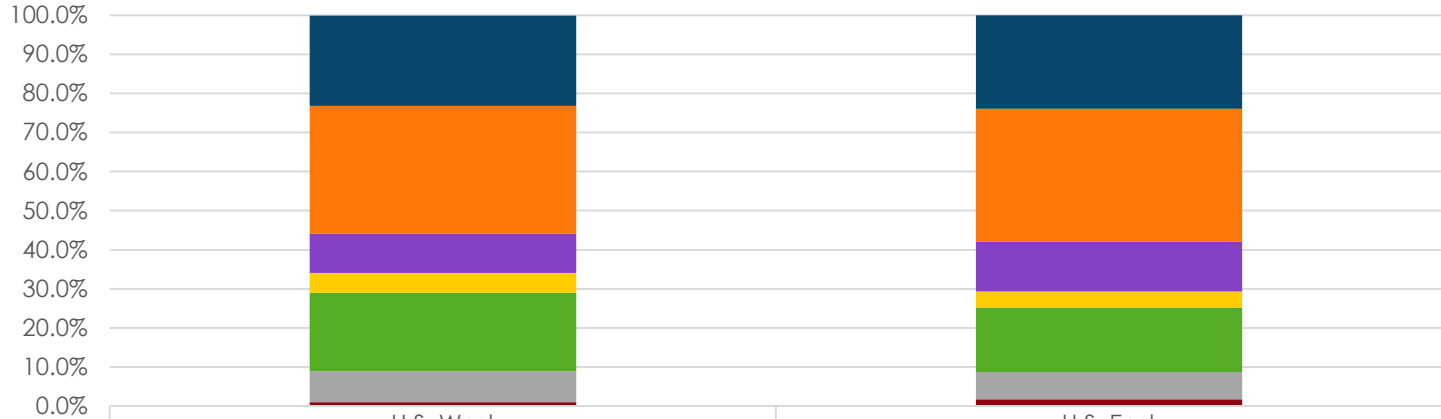
	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	100.0%	93.4%
<b>Yes, needed assistance – using full-face mask</b>	0.0%	6.6%
<b>BASE</b>	37	33

# SECTION – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION

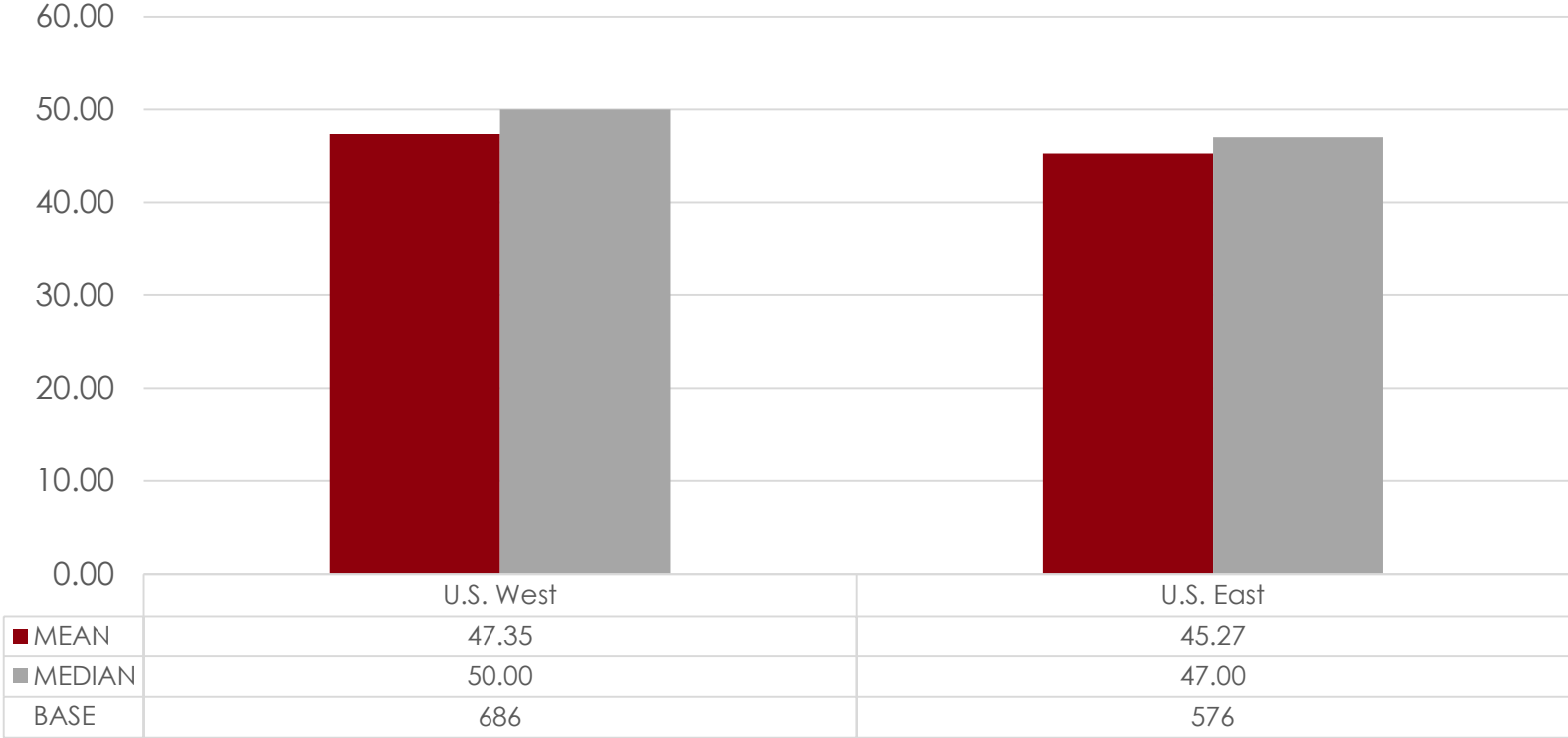


	U.S. West	U.S. East
■ Post-Graduate	23.1%	23.9%
■ College Grad	32.7%	34.1%
■ Associate Degree	10.0%	12.7%
■ Vocational/ Tech	5.1%	4.1%
■ Some College	20.1%	16.5%
■ H.S. Grad	7.9%	7.0%
■ Some / No H.S.	1.0%	1.7%
BASE	686	579

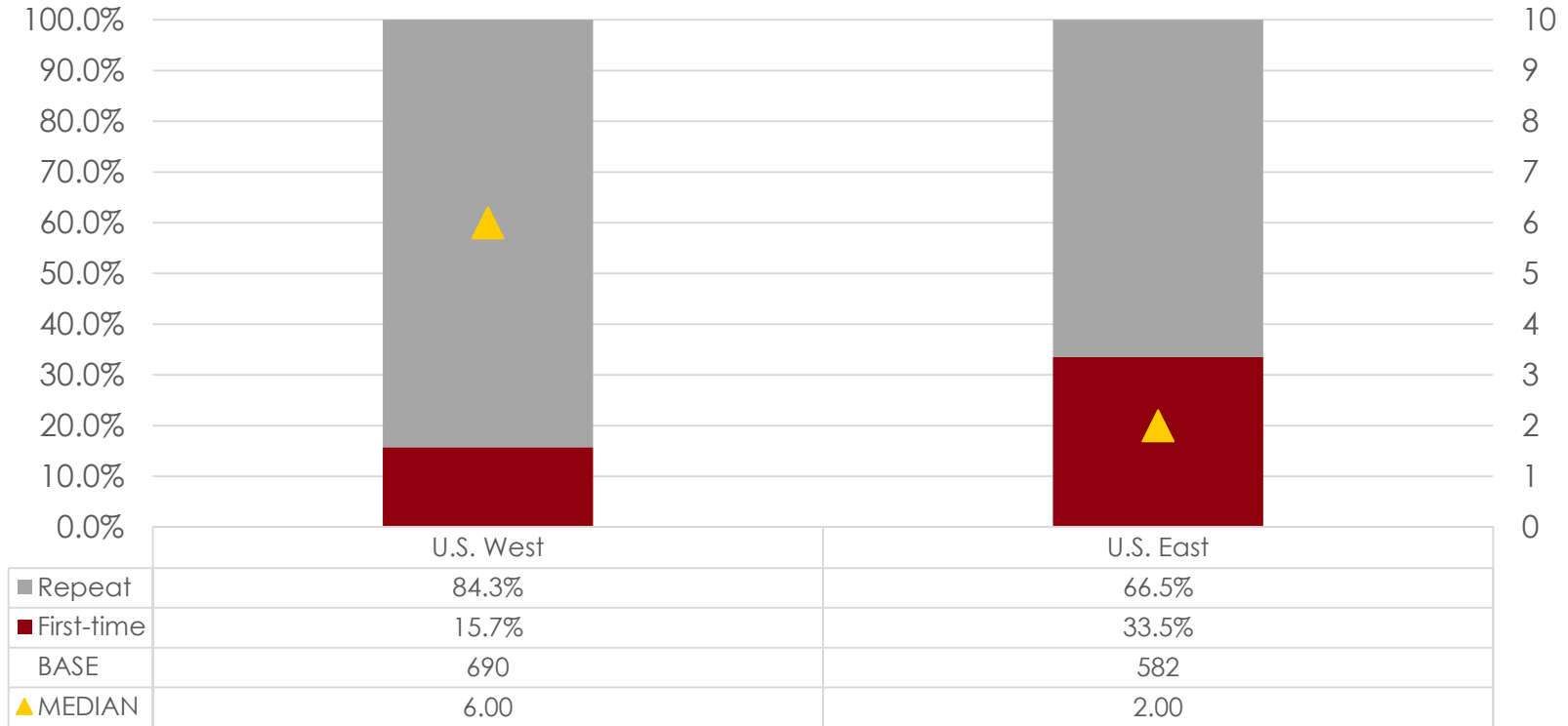
## VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	13.9%	16.5%
\$40,000 to \$59,999	8.9%	12.4%
\$60,000 to \$79,999	11.7%	11.4%
\$80,000 to \$99,999	8.2%	9.7%
\$100,000 to \$124,999	12.3%	12.6%
\$125,000 to \$149,999	11.7%	11.4%
\$150,000 to \$174,999	8.7%	5.0%
\$175,000 to \$199,999	4.9%	5.5%
\$200,000 to \$249,999	7.7%	4.7%
\$250,000 +	12.1%	10.8%

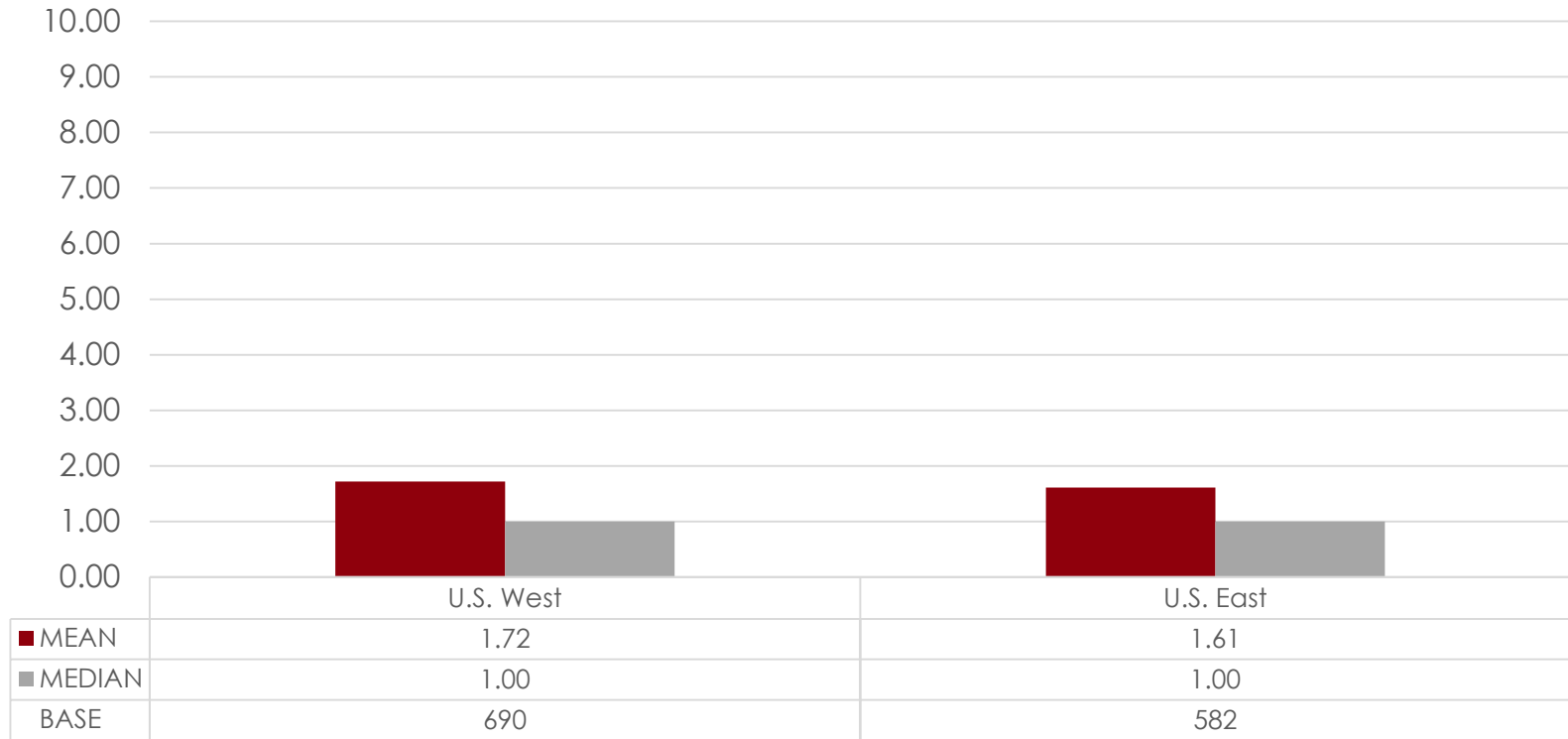
# VISITOR PROFILE – AGE



# VISITOR PROFILE – TRIPS TO HAWAI‘I



# VISITOR PROFILE – TRAVEL PARTY SIZE





# VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
<b>Alone</b>	53.9%	59.6%
<b>Spouse</b>	21.4%	17.5%
<b>Child &lt;18</b>	14.5%	11.3%
<b>Other adult family</b>	11.8%	7.1%
<b>Friend/ Associate</b>	7.4%	6.6%
<b>Girlfriend/ boyfriend</b>	3.0%	4.6%
<b>Same-sex partner</b>	1.0%	0.4%

# 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 <math>\pm</math></b>
<b>US West</b>	449	4.62
<b>US East</b>	437	4.69
<b>All MMAs</b>	886	3.29

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	49	14.00
<b>US East</b>	27	18.86
<b>All MMAs</b>	76	11.24

\*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>	92	10.22
<b>US East</b>	63	12.35
<b>All MMAs</b>	155	7.87

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	128	8.66
<b>US East</b>	79	11.03
<b>All MMAs</b>	207	6.81

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