

VISITOR SATISFACTION STUDY Q1 2022

State of Hawai'i
Department of Business, Economic Development & Tourism

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Survey Methodology

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. For Q1 2022, the sampled visitor markets 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.), and Canada.

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	1,588	2.46%	16.2%
U.S. East	1,705	2.37%	17.4%
Canada	539	4.22%	26.0%
All visitor markets	3,832	1.58%	17.6%

Survey Methodology (cont.)

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

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both visitor markets were reported as weighted data based on weights generated for 2022 Q1. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

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

Effect of COVID-19 Pandemic

COVID-19 Travel Restrictions

Concerns around the continuing COVID-19 pandemic have resulted in significant travel restrictions and limited flights to Hawai'i from China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter. Resumption of additional flights from Canada enabled resulted in a sufficient number of visitors to Hawai'i for that market to be included in this report for the first time since Q1 2020.

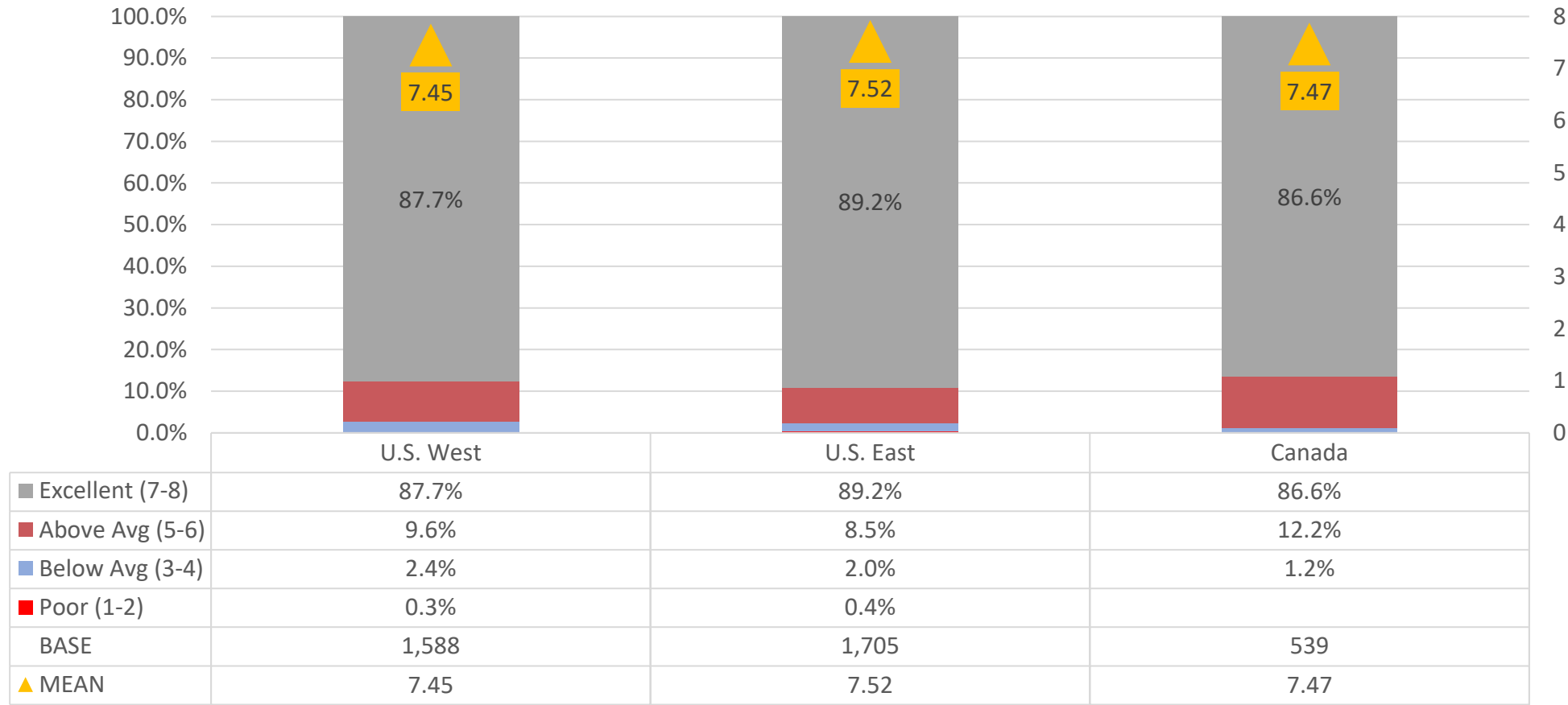
State of Hawai'i Safe Travels Program

Originally launched on March 26, 2020, the State of Hawai'i Safe Travels program has continued to evolve over the course of the COVID-19 pandemic. By July 8, 2021, the State of Hawai'i launched a vaccination exception program for domestic, Hawai'i-bound travelers vaccinated in the United States or U.S Territories. This program allowed these travelers to bypass the state's quarantine requirement with proof of vaccination. Beginning March 26, 2022, the State of Hawai'i no longer required U.S. domestic travelers to complete a Safe Travels application to enter the state, quarantine, take a pre-travel COVID-19 test, or show proof of vaccination. International visitors were still required to comply with U.S. federal guidelines.

Section 1 – Visitor Satisfaction

Satisfaction - State of Hawai'i by Visitor Market

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

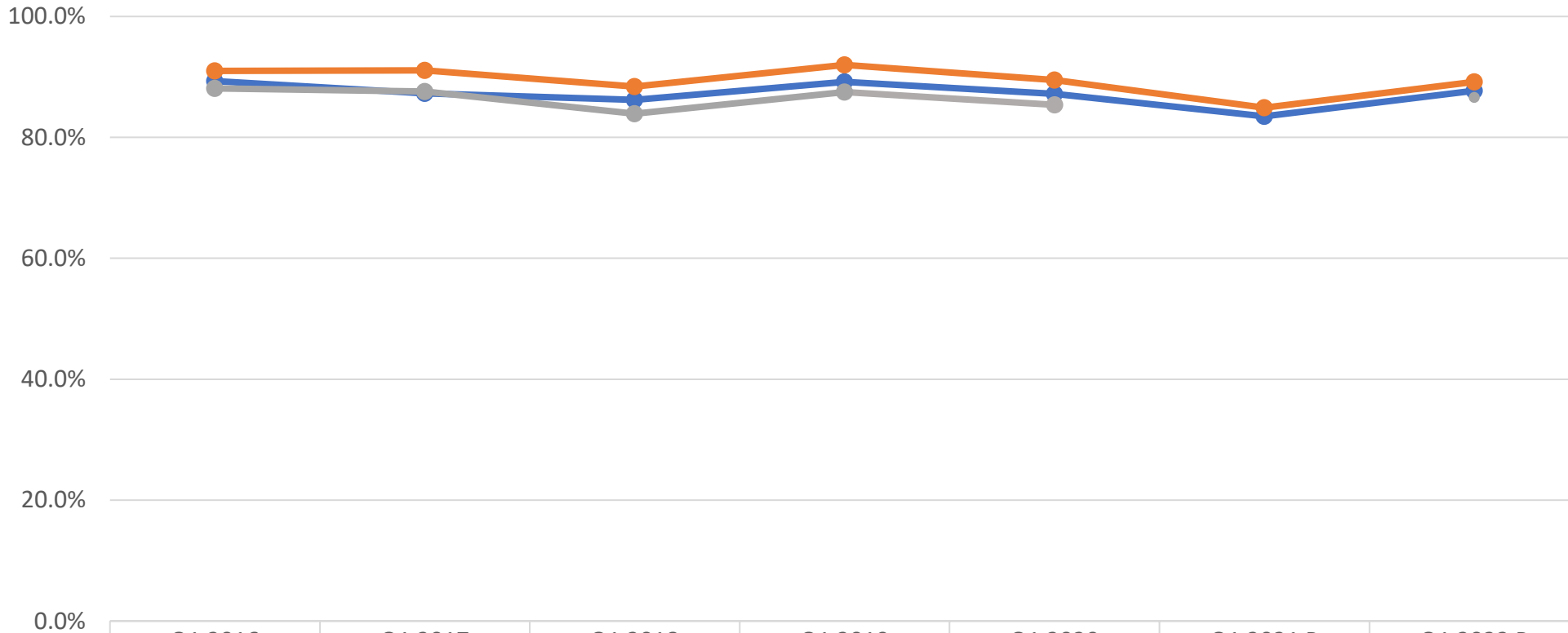


Satisfaction - State of Hawai'i by Visitor Market

- ***Trips to Hawai'i:*** First-time visitors from U.S. East were more satisfied than repeat visitors from this region.
- ***Age:*** Amongst visitors from U.S. West and U.S. East satisfaction is highest amongst younger travelers or those under the age of 35 and is lowest amongst visitors between the ages of 50 and 64.

Satisfaction - State of Hawai'i by Visitor Market

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

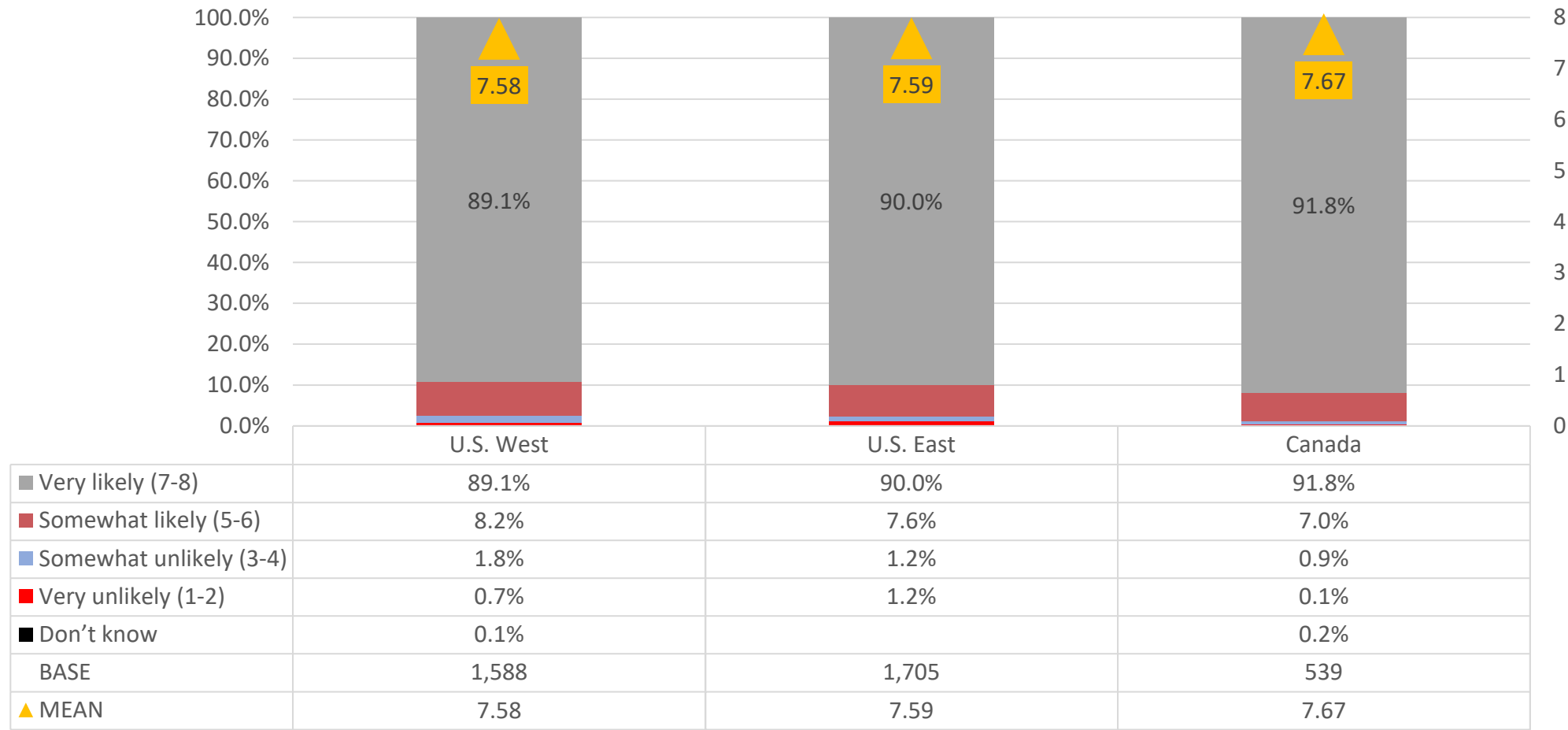


	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	89.3%	87.3%	86.2%	89.2%	87.2%	83.5%	87.7%
U.S. East	91.0%	91.1%	88.4%	92.0%	89.5%	84.9%	89.2%
Canada	88.1%	87.6%	83.9%	87.5%	85.4%		86.6%

P= Preliminary Data

BRAND/ DESTINATION - ADVOCACY

8-pt Rating Scale
8=Very likely / 1=Very unlikely

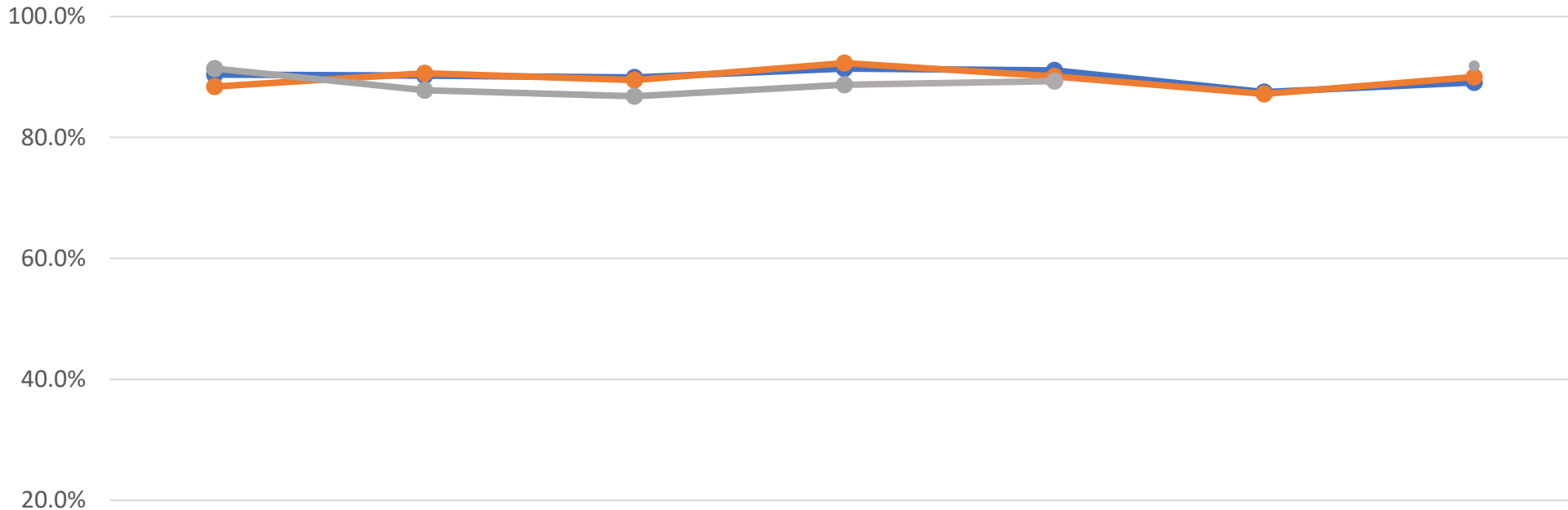


BRAND/ DESTINATION - ADVOCACY

- **Travel party size:** Visitors from U.S. West who traveled to the state alone expressed the greatest likelihood of recommending travel to the islands compared to those who traveled with another individual.
- **Household income:** Brand advocacy is higher amongst less affluent travelers. Those travelers from both U.S. West and U.S. East in the bottom income tier (<\$100K) are the most likely to recommend travel to the state. Conversely, brand advocacy in both U.S. regions is lowest amongst affluent travelers or those who reside in homes with combined incomes greater than \$150K.
- **Gender:** Female visitors from U.S. West, U.S. East, and Canada all gave higher scores indicating a greater likelihood to recommend travel to the state compared to male travelers.
- **Education:** Amongst travelers from U.S. West, those without a college degree express a higher likelihood of recommending travel to the state than were those with a college degree from this travel region.

BRAND/ DESTINATION - ADVOCACY

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

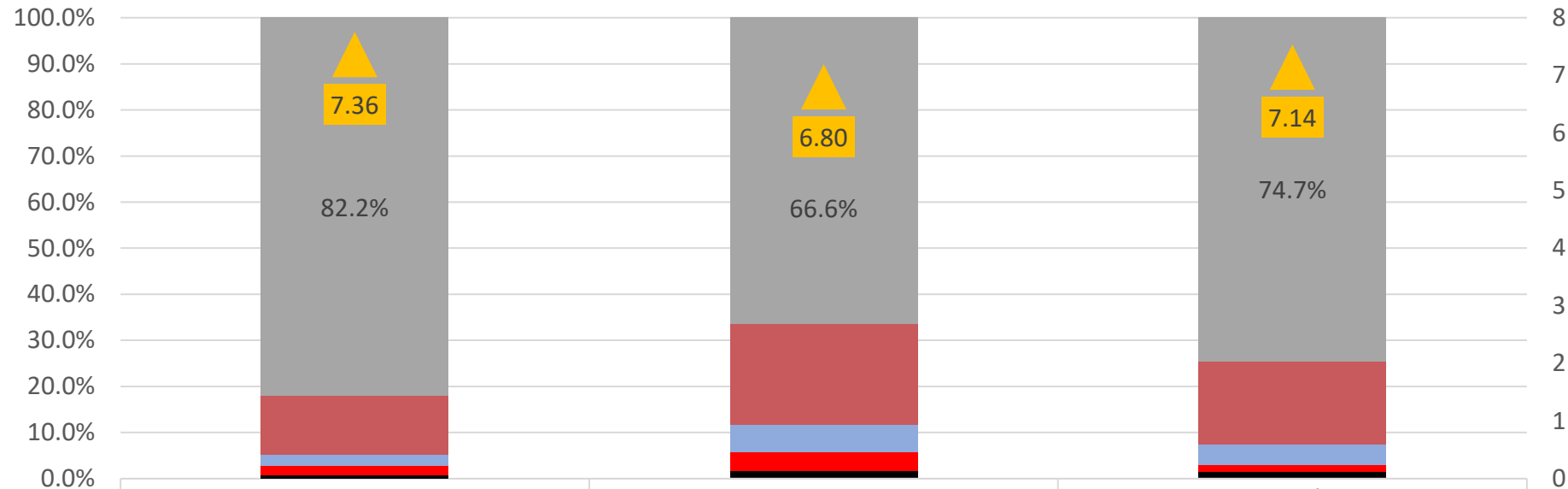


	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	90.4%	90.2%	89.9%	91.4%	91.1%	87.5%	89.1%
U.S. East	88.4%	90.6%	89.5%	92.3%	90.1%	87.2%	90.0%
Canada	91.4%	87.8%	86.8%	88.7%	89.3%		91.8%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale
8=Very likely / 1=Very unlikely



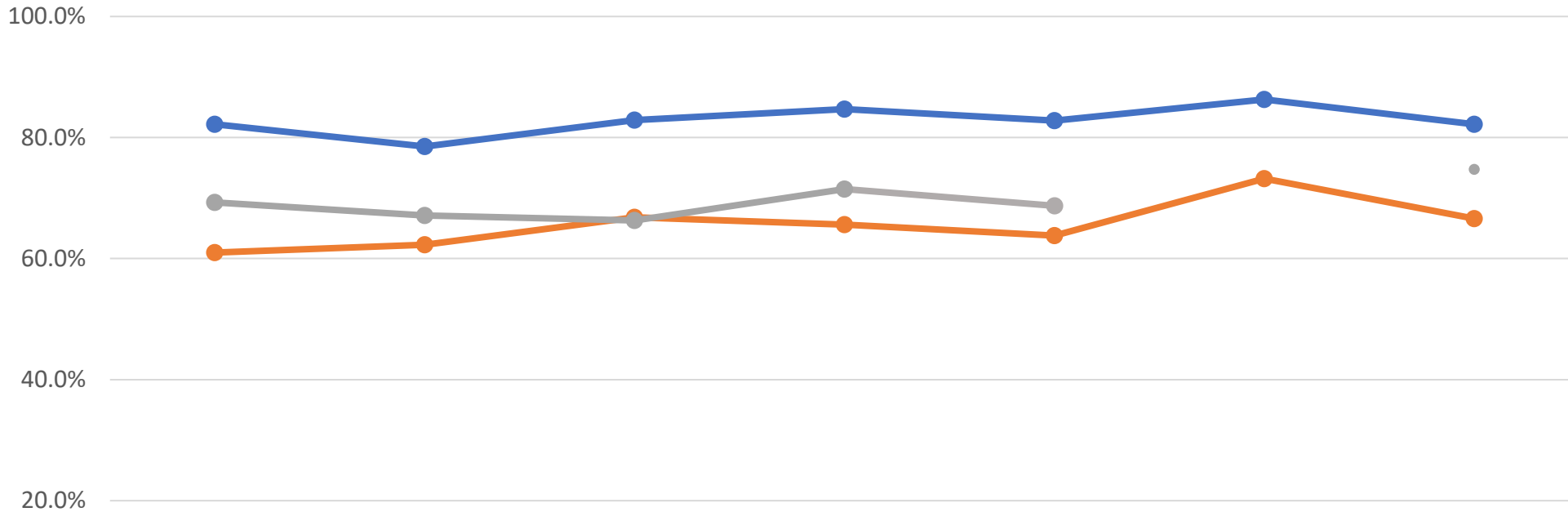
	U.S. West	U.S. East	Canada
Very likely (7-8)	82.2%	66.6%	74.7%
Somewhat likely (5-6)	12.7%	21.8%	18.0%
Somewhat unlikely (3-4)	2.5%	6.0%	4.6%
Very unlikely (1-2)	2.0%	4.0%	1.4%
Don't know	0.7%	1.7%	1.4%
BASE	1,588	1,705	539
▲ MEAN	7.36	6.80	7.14

LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from both U.S. West and U.S. East express a greater likelihood to return to the state than first-time visitors.
- ***Islands visited:*** Travelers from U.S. East whose trip consisted of a visit to a single island express a greater likelihood to return to the state compared to those who visited multiple islands during their most recent stay.
- ***Gender:*** Female respondents express a greater willingness to return to the state amongst travelers from U.S. West.
- ***Household income:*** Those travelers from U.S. West in the bottom incomes tier (<\$100K) are the least likely to believe they will return to the state.
- ***College graduate:*** Less educated segments from U.S. West or those without a college degree gave higher mean scores.

LIKELIHOOD OF RETURN VISIT

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	82.2%	78.5%	82.9%	84.7%	82.8%	86.3%	82.2%
U.S. East	61.0%	62.3%	66.8%	65.6%	63.8%	73.2%	66.6%
Canada	69.3%	67.1%	66.3%	71.5%	68.7%		74.7%

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q1 2021 P	Q1 2022 P
30.9% COVID-19	53.1% Too expensive
28.7% Too expensive	27.7% Want to go someplace new
26.6% Unfriendly people/ felt unwelcome	21.2% Poor value
24.7% Want to go someplace new	21.0% COVID-19
17.5% Poor value	17.7% Too crowded/ congested
10.7% No compelling reason to return	15.0% Too commercialized/ overdeveloped
10.2% Too commercialized/ overdeveloped	12.4% Five years is too soon to revisit
	11.8% Flight is too long
	11.8% No compelling reason to return

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q1 2021 P	Q1 2022 P
38.0% Too expensive	48.8% Too expensive
24.8% Flight is too long	42.7% Want to go someplace new
23.6% COVID-19	42.7% Flight too long
20.7% Want to go someplace new	21.6% Poor value
18.0% Poor value	16.1% Five years is too soon
17.8% Unfriendly people/ Felt unwelcome	14.1% Too crowded/ congested
13.9% Poor service	11.6% Too commercialized/ overdeveloped
13.2% Other financial obligations	11.1% Other financial obligations
10.4% Five years is too soon	
10.2% No compelling reason to return	

P= Preliminary Data

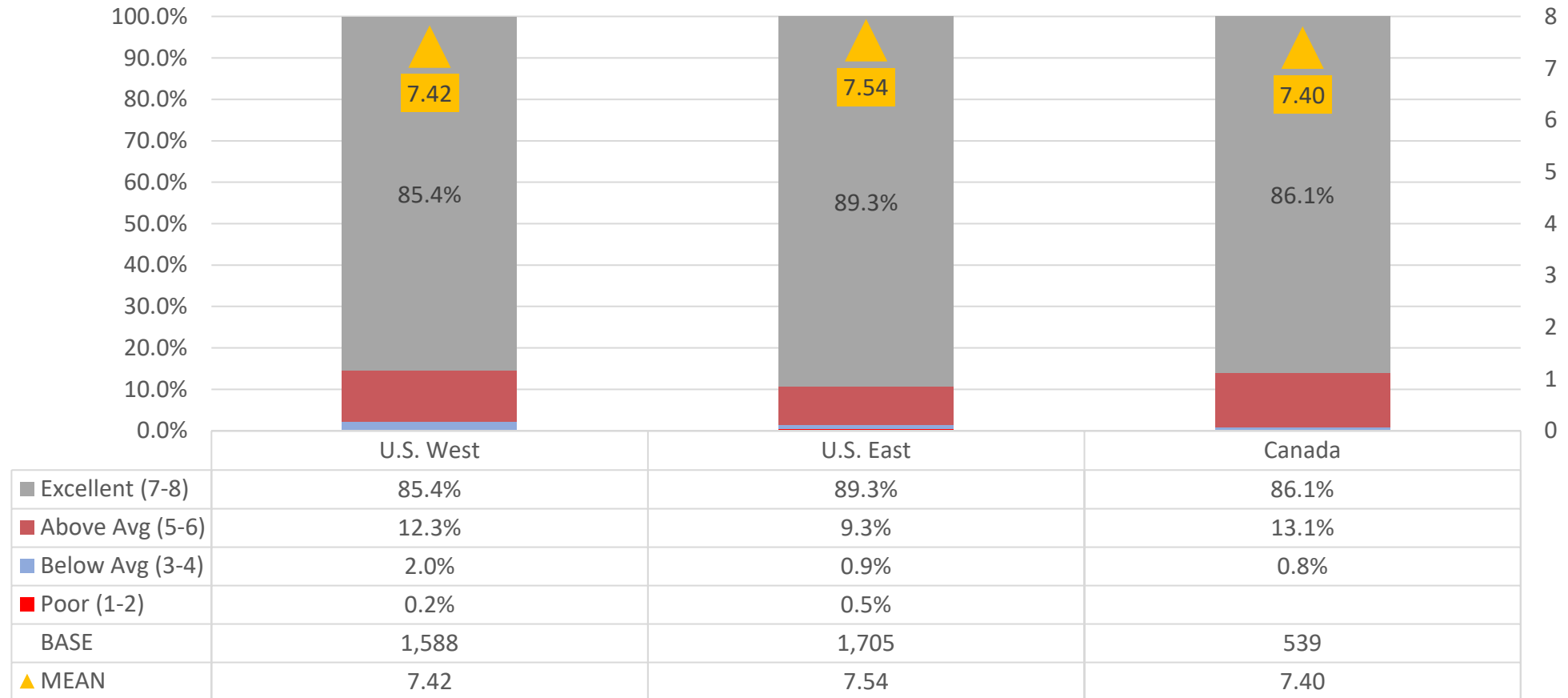
UNLIKELY TO RETURN - TOP REASONS CANADA

Q1 2020	Q1 2022 P
50.4% Too expensive	42.0% Too expensive
47.3% Want to go someplace new	34.6% Want to go someplace new
30.8% Flight too long	26.2% Flight too long
20.9% Poor value	15.9% Too crowded/ congested
16.4% Five years is too soon to return	15.0% Too commercialized/ overdeveloped
15.7% Too commercialized/ overdeveloped	12.2% Poor value
15.4% Too crowded/ congested	12.1% Five years is too soon
11.7% Other financial obligations	10.3% Other financial obligations

P= Preliminary Data

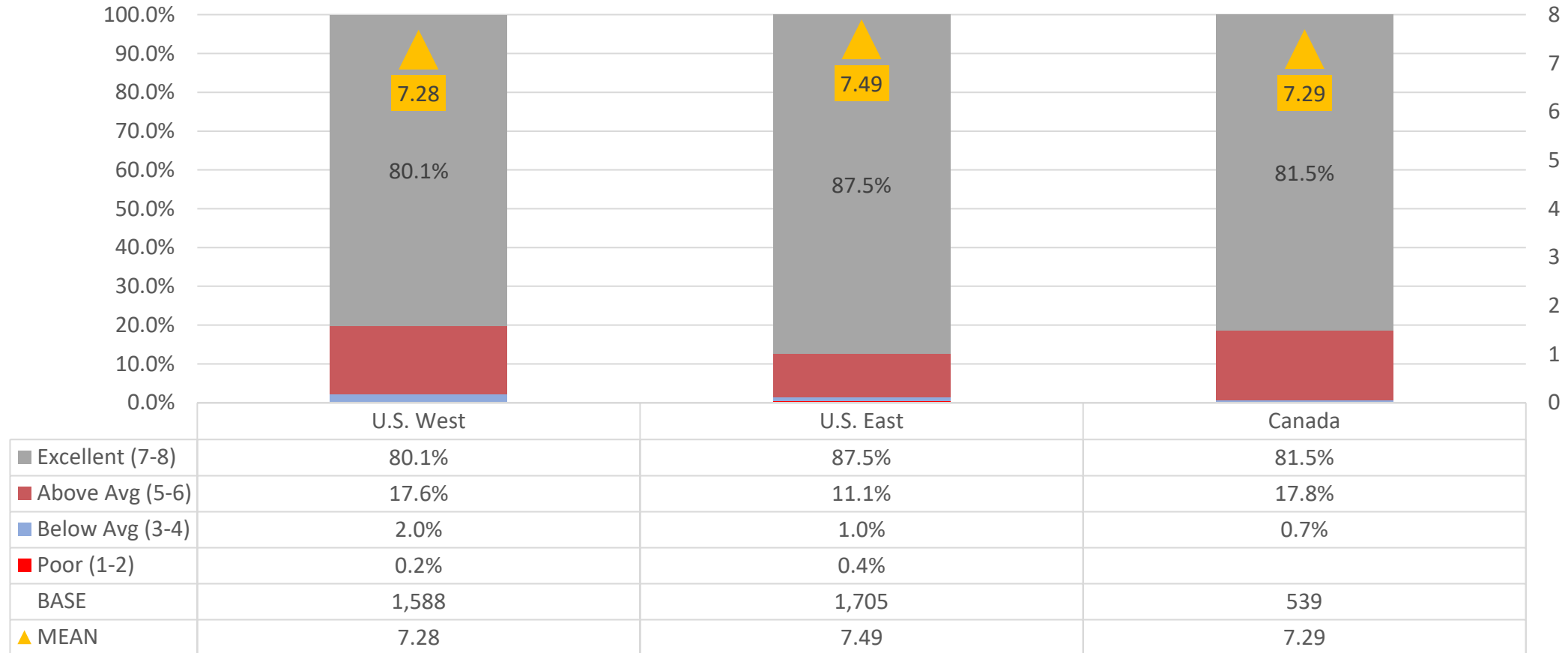
OFFERING A VARIETY OF EXPERIENCES

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



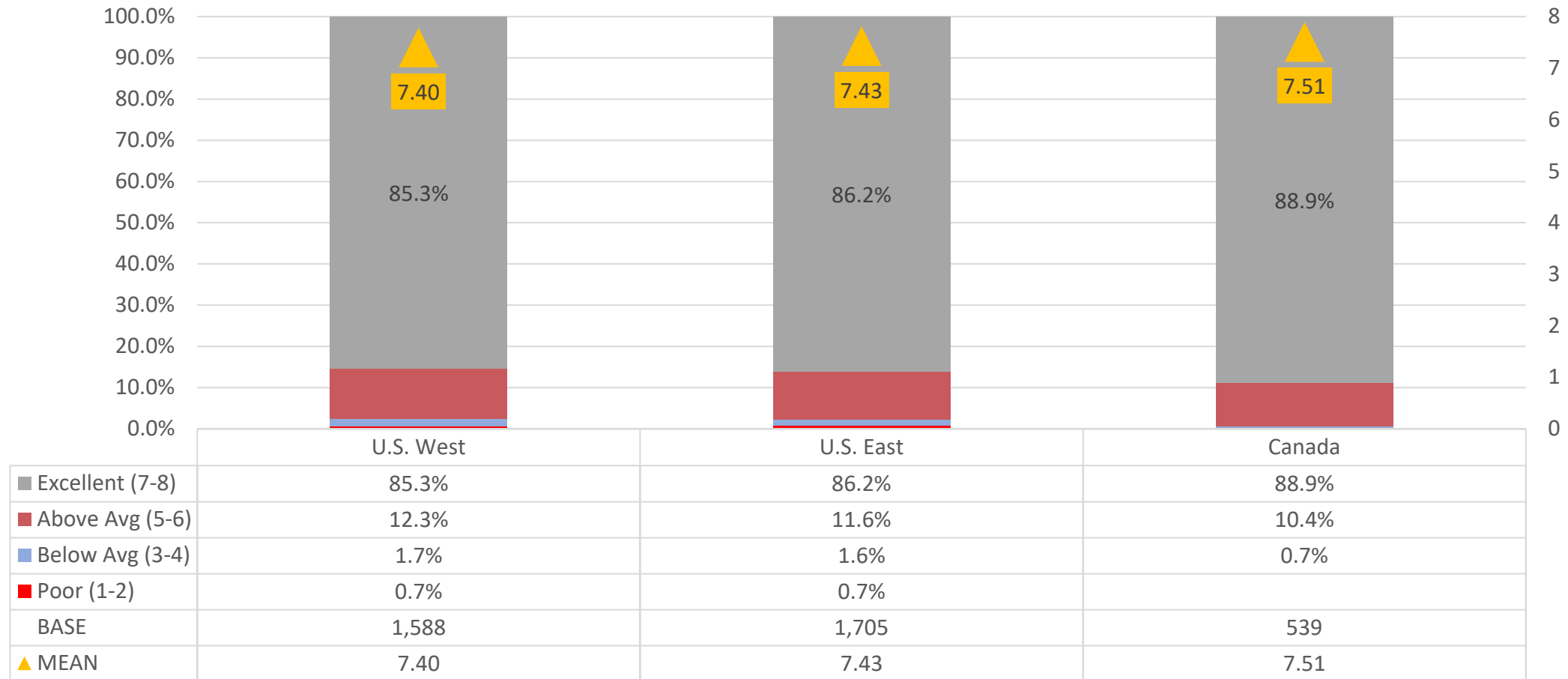
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



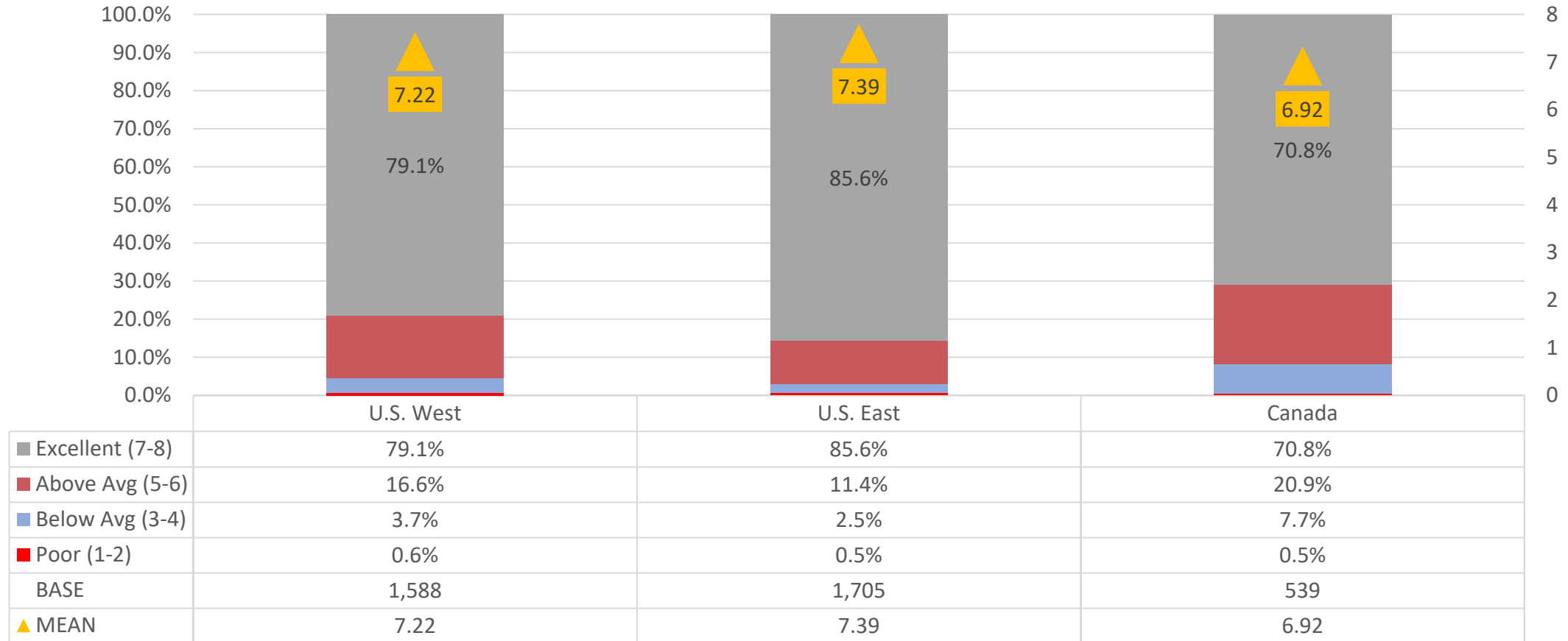
SAFE AND SECURE DESTINATION

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



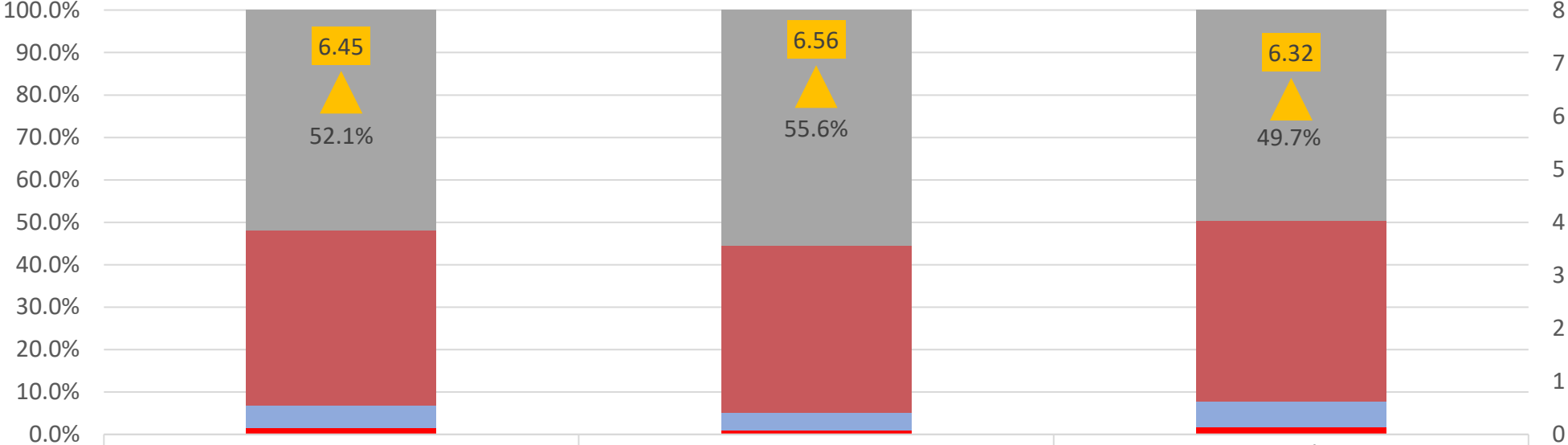
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



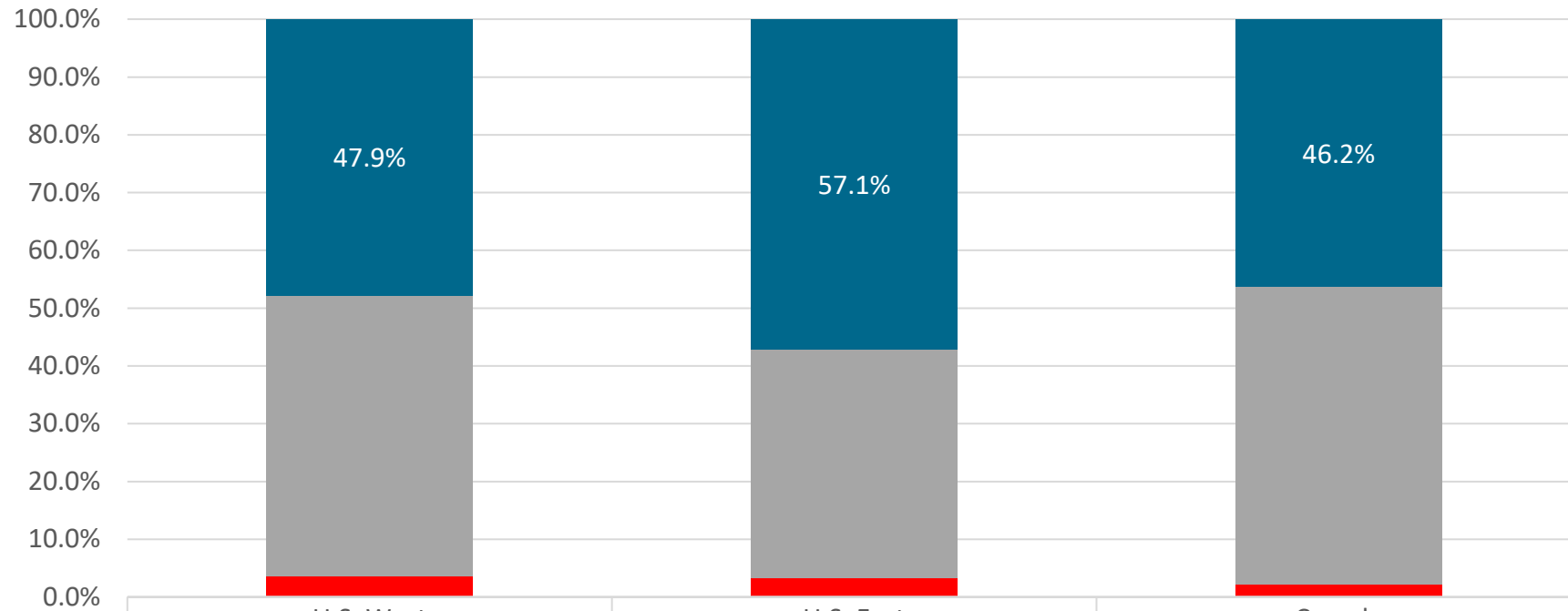
VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



	U.S. West	U.S. East	Canada
■ Excellent (7-8)	52.1%	55.6%	49.7%
■ Above Avg (5-6)	41.3%	39.2%	42.6%
■ Below Avg (3-4)	5.3%	4.2%	6.2%
■ Poor (1-2)	1.4%	1.0%	1.6%
BASE	1,588	1,705	539
▲ MEAN	6.45	6.56	6.32

SATISFACTION - HAWAI'I TRIP EXPECTATIONS



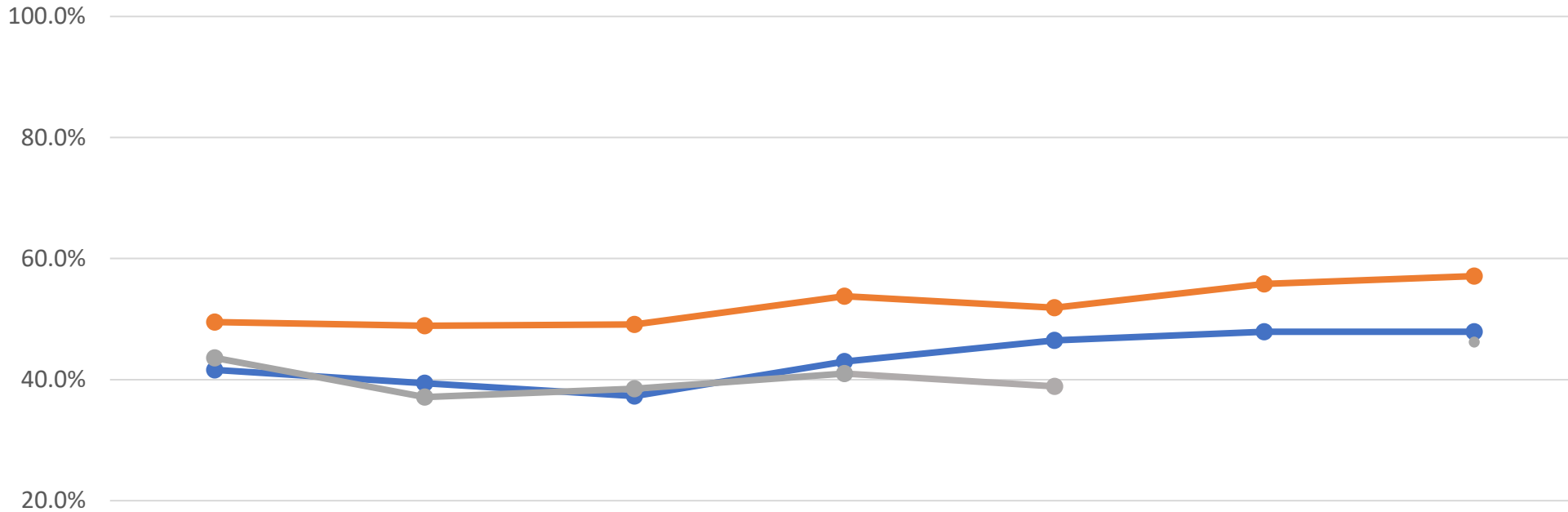
	U.S. West	U.S. East	Canada
■ Exceeded expectations	47.9%	57.1%	46.2%
■ Met expectations	48.6%	39.6%	51.6%
■ Did NOT meet expectations	3.6%	3.3%	2.2%
BASE	1,588	1,705	539

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from U.S. West, U.S. East, and Canada, all express higher degrees of satisfaction than repeat visitors from these visitor markets.
- ***Age:*** Satisfaction is highest amongst younger travelers in all three regions (U.S. West, U.S. East, and Canada) and declines with age eventually bottoming out amongst seniors.
- ***Gender:*** Female respondents gave higher satisfaction scores than males in all three visitor markets (U.S. West, U.S. East, and Canada).
- ***Household income:*** Those travelers from U.S. West in the bottom incomes tier (<\$100K) express the highest levels of satisfaction.

SATISFACTION - HAWAII TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	41.6%	39.4%	37.3%	43.0%	46.5%	47.9%	47.9%
U.S. East	49.5%	48.9%	49.1%	53.8%	51.9%	55.8%	57.1%
Canada	43.6%	37.1%	38.5%	41.0%	38.9%		46.2%

Section 2 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Canada
TOTAL	96.0%	97.6%	96.6%
On own (self guided)	84.0%	81.8%	88.2%
Helicopter/ airplane	4.0%	8.0%	7.6%
Boat/ submarine/ whale	31.3%	44.0%	28.1%
Visit towns/communities	52.9%	56.0%	57.4%
Limo/ van/ bus tour	6.3%	13.5%	5.5%
Scenic views/ natural landmark	60.5%	69.7%	63.0%
Movie/ TV/ film location	5.1%	6.5%	4.7%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Canada
TOTAL	97.7%	98.0%	98.8%
Beach/ sunbathing	88.0%	90.2%	90.7%
Bodyboarding	11.1%	7.9%	16.5%
Standup paddle board	6.5%	5.0%	4.5%
Surfing	5.9%	7.6%	9.0%
Canoeing/ kayak	6.7%	6.5%	8.8%
Swim in the ocean	67.2%	67.5%	74.7%
Snorkeling	45.4%	41.5%	48.3%
Freediving	1.5%	1.4%	2.0%
Windsurf/ Kitesurf	0.2%	0.1%	0.2%
Jet ski/ Parasail	0.8%	1.1%	0.5%
Scuba diving	2.1%	2.2%	3.5%
Fishing	4.0%	3.2%	4.3%
Golf	6.6%	8.5%	11.7%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Canada
TOTAL	97.7%	98.0%	98.8%
Run/ Jog/ Fitness walk	31.7%	30.9%	39.4%
Cycling	2.4%	2.6%	4.4%
Spa	8.2%	8.4%	6.0%
Hiking	47.6%	54.3%	50.8%
Backpack/ camp	1.7%	2.2%	2.3%
Agritourism	10.2%	13.3%	9.1%
Sport event/ tournament	1.4%	2.1%	2.6%
Park/ botanical garden	37.2%	41.7%	33.2%
Waterpark	1.1%	0.7%	1.4%
Mountain tube/ waterfall rappel	1.3%	1.6%	1.4%
Zip lining	3.6%	3.9%	1.4%
Skydiving	0.3%	0.1%	0.3%
All terrain vehicle (ATV)	3.9%	4.2%	3.3%
Horseback riding	1.1%	1.4%	2.2%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Canada
TOTAL	99.5%	99.1%	99.7%
Lunch/ sunset/ dinner/ evening cruise	22.6%	27.9%	17.5%
Live music/ stage show	27.3%	32.8%	26.4%
Nightclub/ dancing/ bar/ karaoke	7.1%	6.8%	8.0%
Fine dining	49.4%	53.2%	43.7%
Family restaurant	61.6%	59.2%	62.8%
Fast food	33.6%	31.0%	42.8%
Food truck	44.0%	43.3%	41.7%
Café/ coffee house	49.1%	49.4%	55.2%
Ethnic dining	28.4%	32.5%	22.9%
Farm to table cuisine	16.7%	20.2%	14.1%
Prepared own meal	51.8%	44.8%	64.7%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Canada
TOTAL	98.2%	96.8%	98.8%
Mall/ department store	40.7%	36.3%	55.6%
Designer boutique	17.8%	20.2%	21.2%
Hotel/ resort store	31.9%	38.3%	32.3%
Swap meet/ flea market	16.7%	13.5%	16.2%
Discount/ outlet store	14.2%	14.0%	20.2%
Supermarket	66.2%	57.7%	72.2%
Farmer's market	39.9%	33.1%	43.1%
Convenience store	49.6%	50.5%	53.9%
Duty free store	3.9%	3.2%	3.5%
Hawai'i made products	46.5%	48.4%	43.5%
Local shop/ artisan	59.2%	63.4%	58.6%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Canada
TOTAL	66.5%	75.2%	61.1%
Historic military site	18.4%	27.2%	16.6%
Historic Hawaiian site	29.0%	34.0%	26.0%
Other historical site	11.7%	12.0%	9.4%
Art museums	2.7%	3.2%	2.6%
Art gallery/ exhibition	10.4%	10.4%	12.0%
Luau/ Polynesian show/ hula show	25.5%	37.8%	19.8%
Lesson ex. ukulele, hula, canoe, lei making	3.9%	5.3%	1.6%
Play/ concert/ theatre	2.7%	1.5%	2.9%
Art/ craft fair	10.2%	10.9%	9.5%
Festival event	2.7%	2.8%	2.0%

ACTIVITIES - TRANSPORTATION

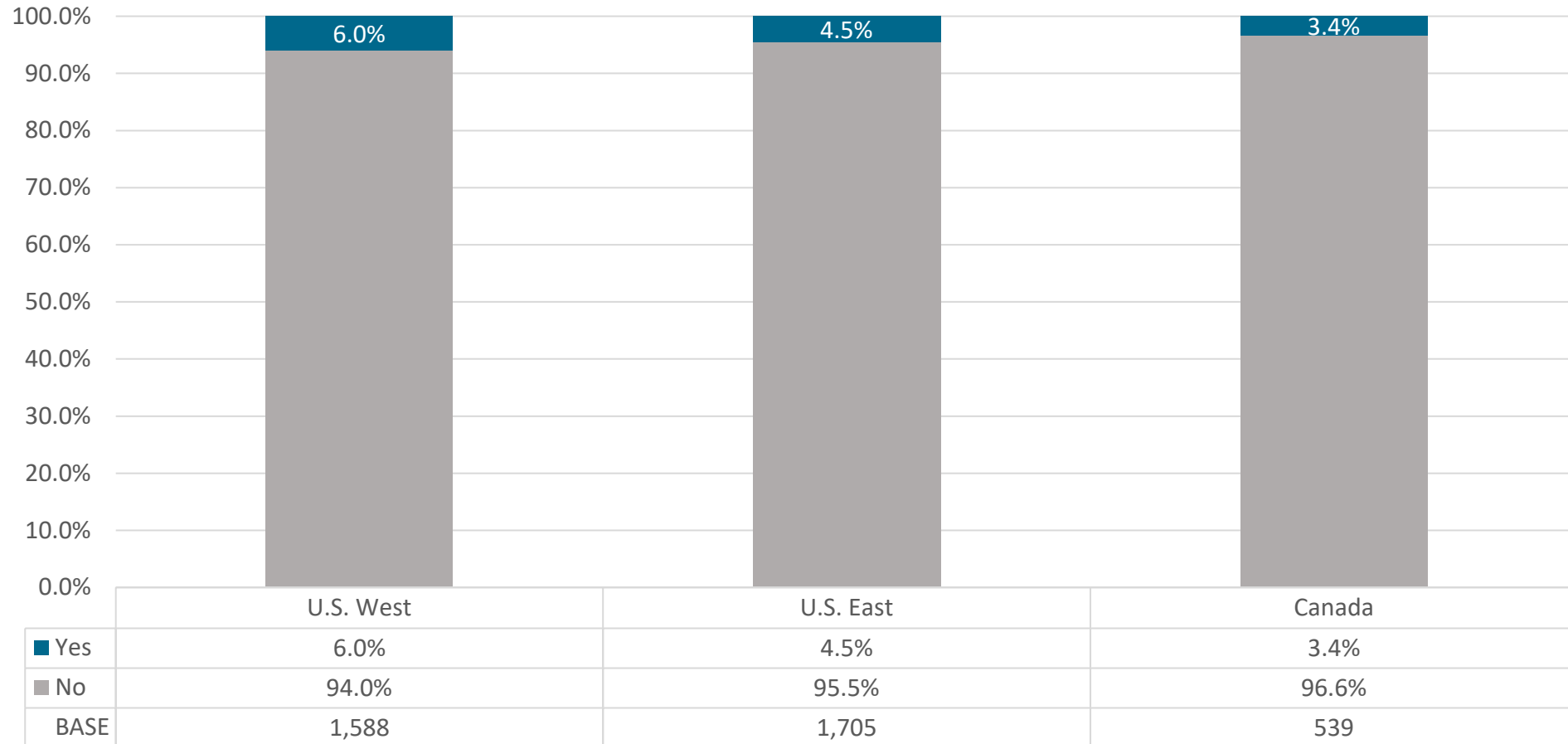
	U.S. West	U.S. East	Canada
TOTAL	93.4%	93.1%	96.8%
Airport shuttle	11.9%	12.8%	15.9%
Trolley	2.1%	3.0%	3.4%
Public bus	4.8%	4.5%	7.9%
Tour bus/ tour van	6.9%	13.2%	6.6%
Taxi/ limo	6.7%	9.6%	17.3%
Rental car	74.1%	70.7%	78.4%
Ride share	15.5%	18.5%	19.9%
Car share	6.4%	5.8%	5.5%
Bicycle rental	2.8%	3.0%	5.0%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Canada
TOTAL	33.9%	29.6%	26.3%
Visit friends/ family	32.0%	27.9%	24.9%
Volunteer non profit	2.6%	2.6%	2.0%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

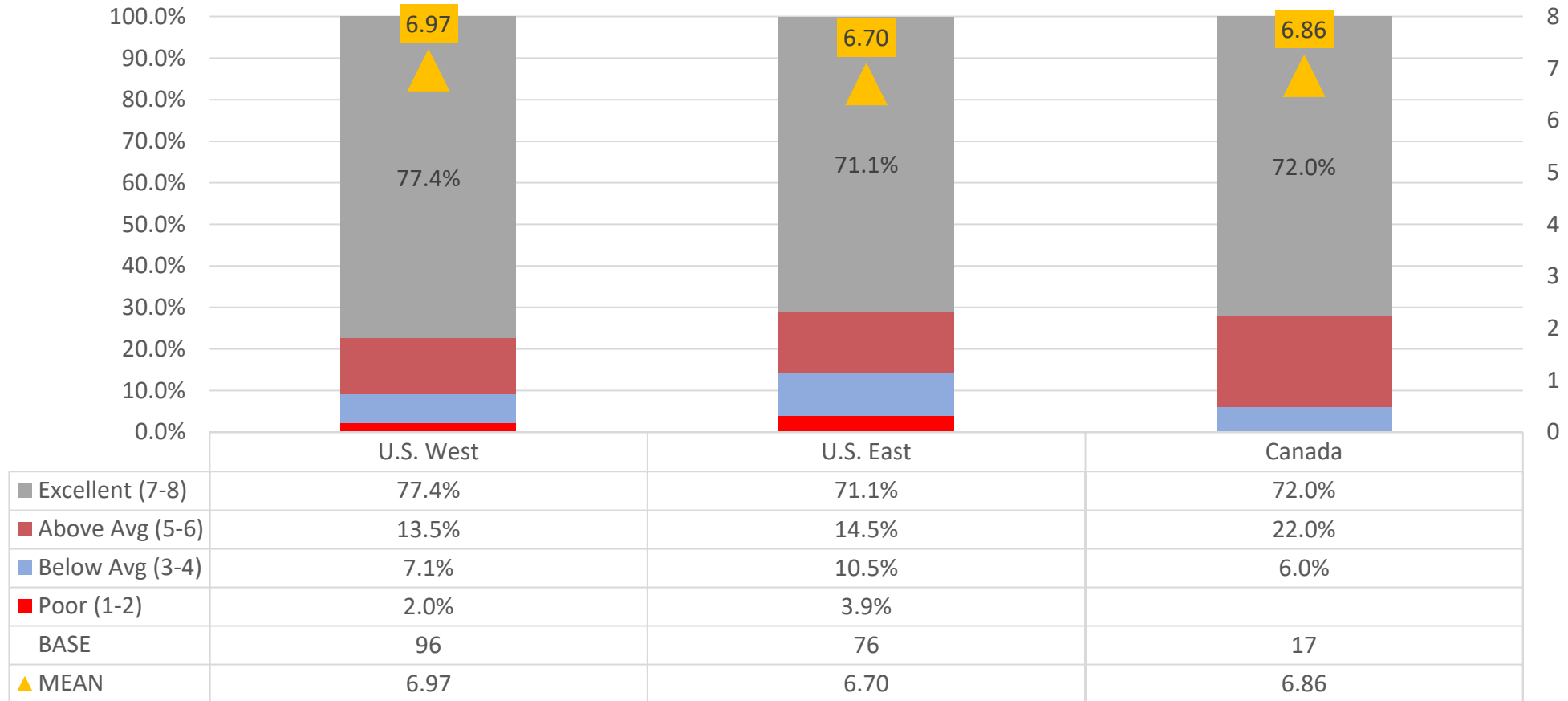


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Canada
Mobility aid (wheelchair, scooter, crutches, cane, etc.)	80.2%	79.2%	66.0%
Personal assistance	19.5%	19.5%	6.0%
Orientation and Mobility Assistance	6.3%	5.2%	10.0%
Other	2.0%	5.2%	6.0%
N/A- No one needed assistance	1.3%	2.6%	6.0%
Ambulance/ Hospital/ Medical visit	1.0%	1.3%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	1.3%	0.0%
Lift equipped van	0.0%	0.0%	6.0%
BASE	96	77	17

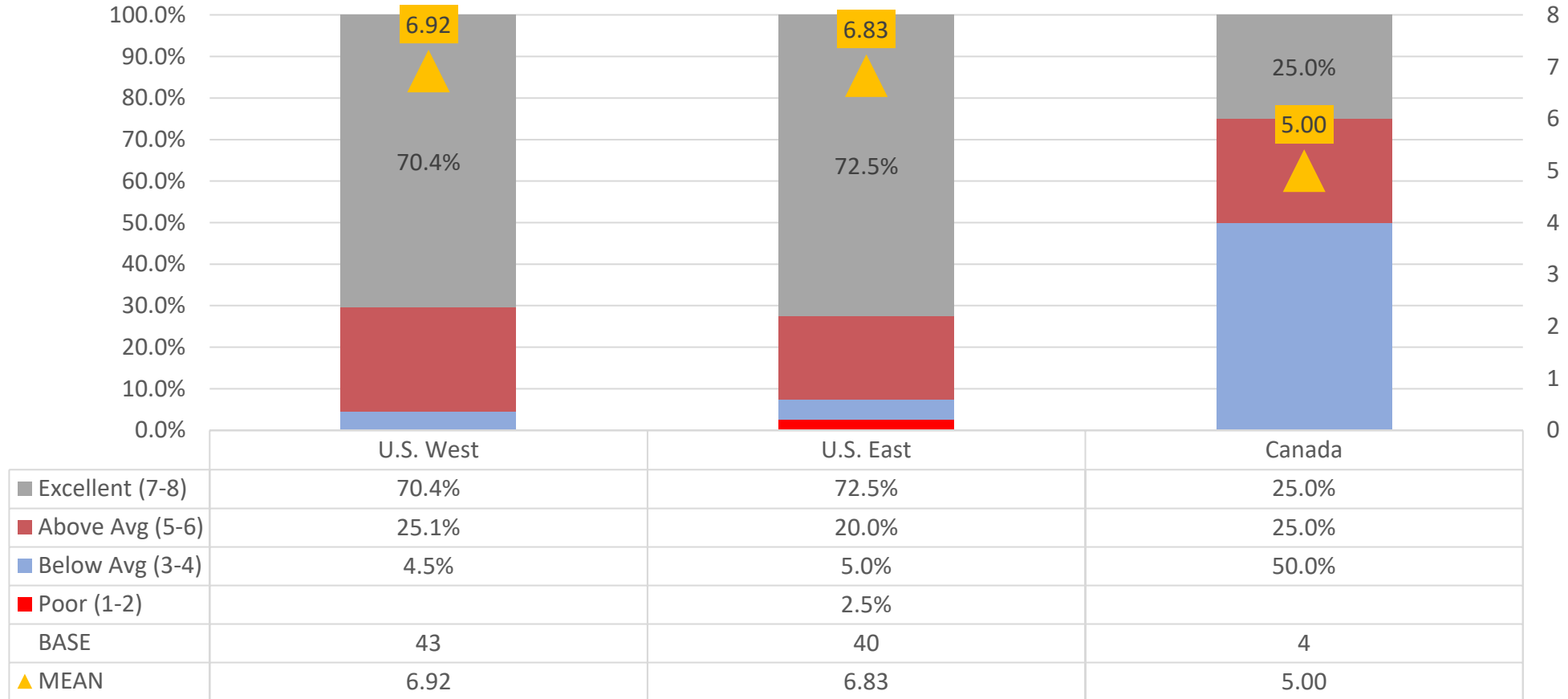
OVERALL ACCESSIBILITY - AIRPORTS

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



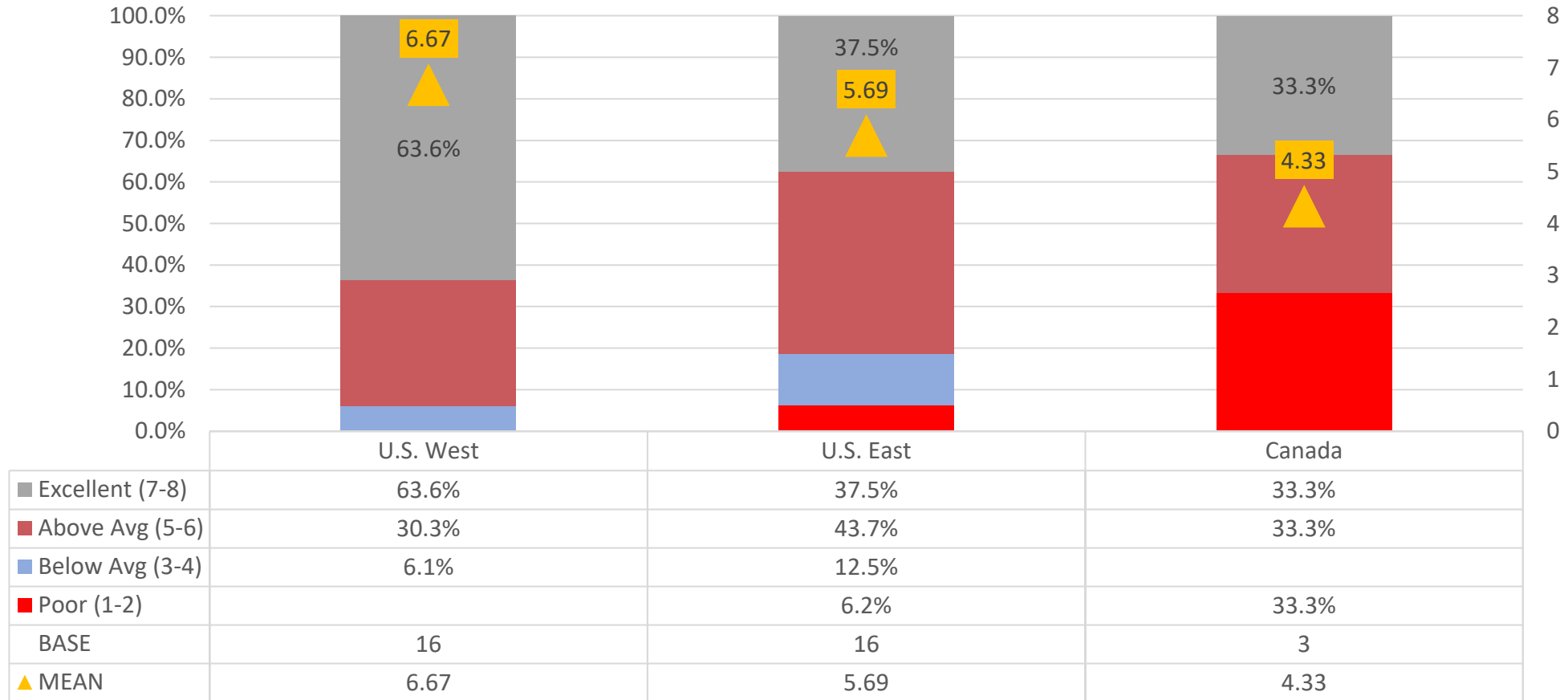
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



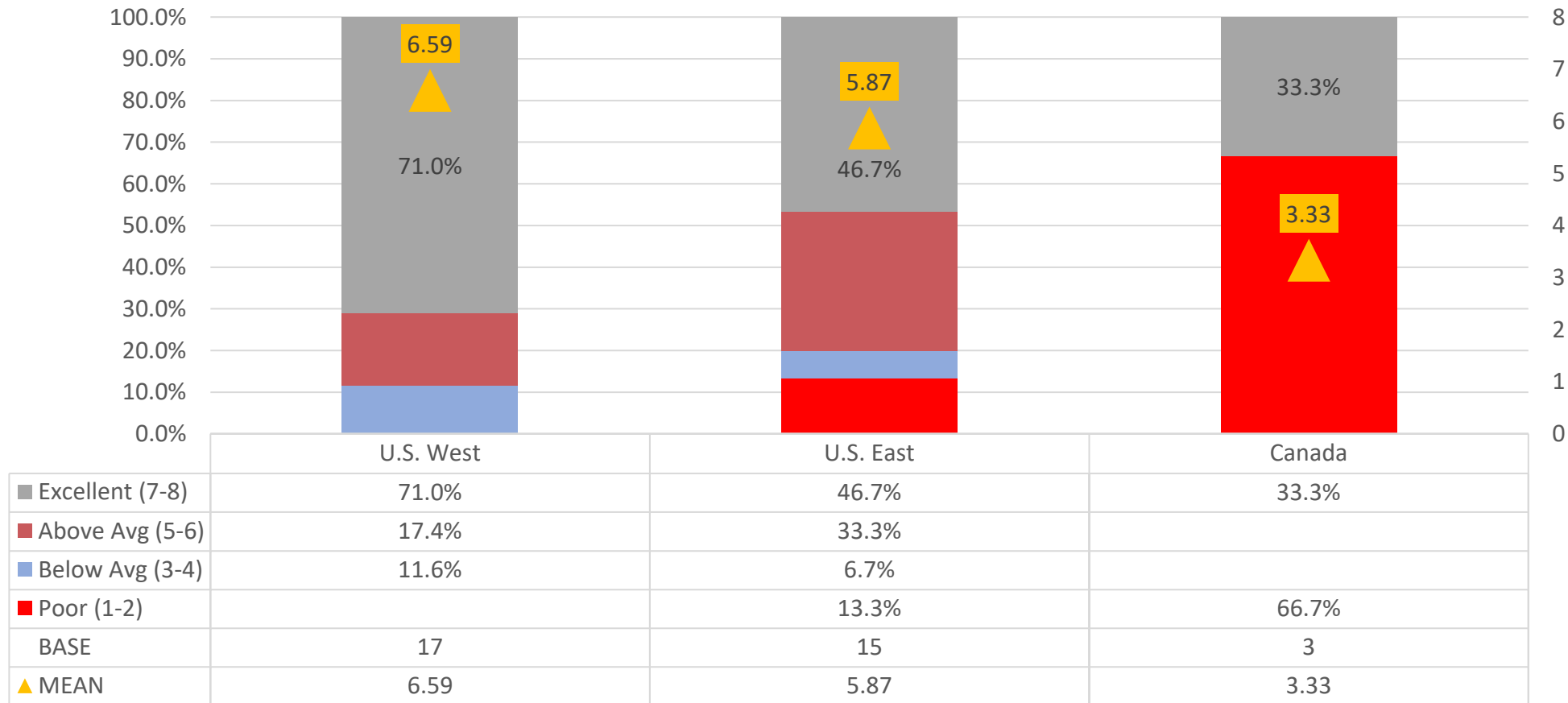
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



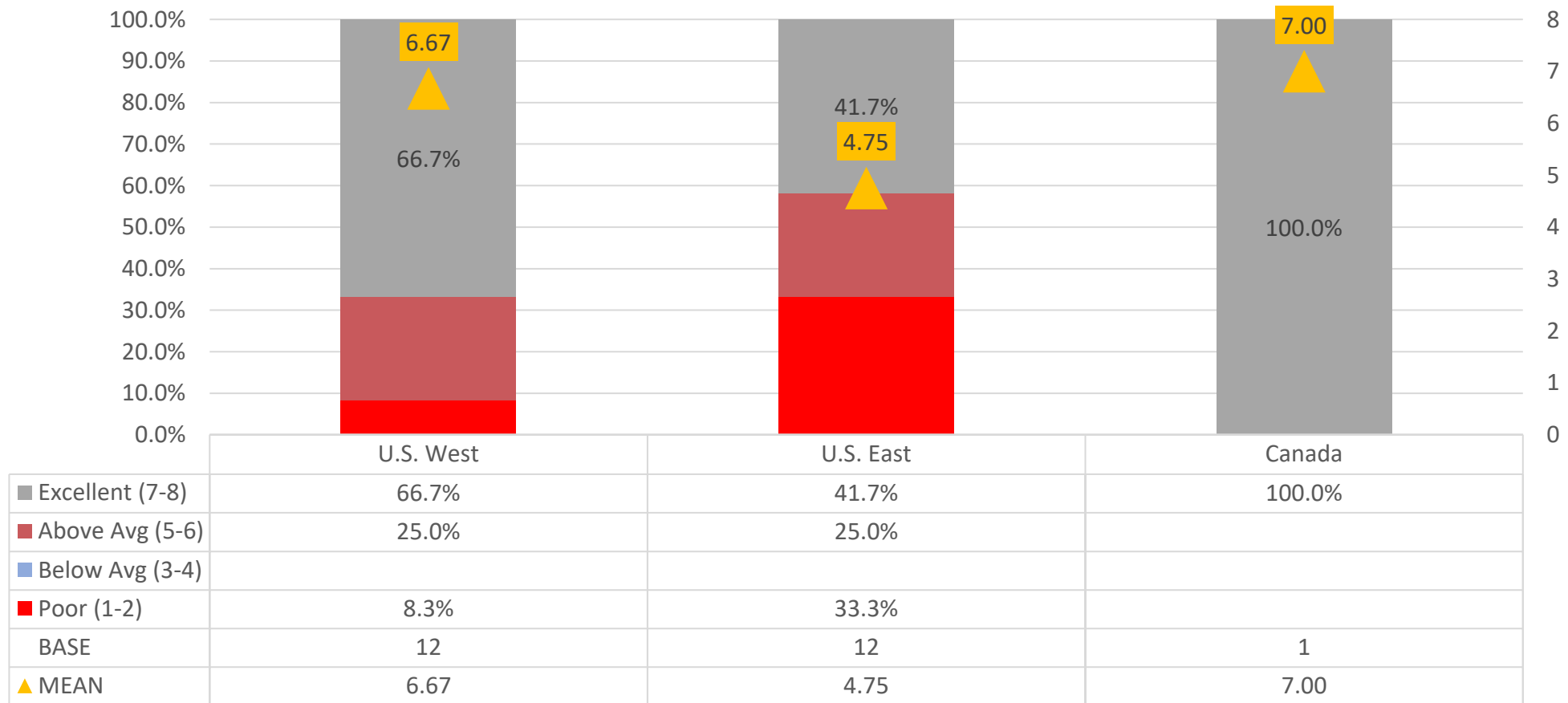
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



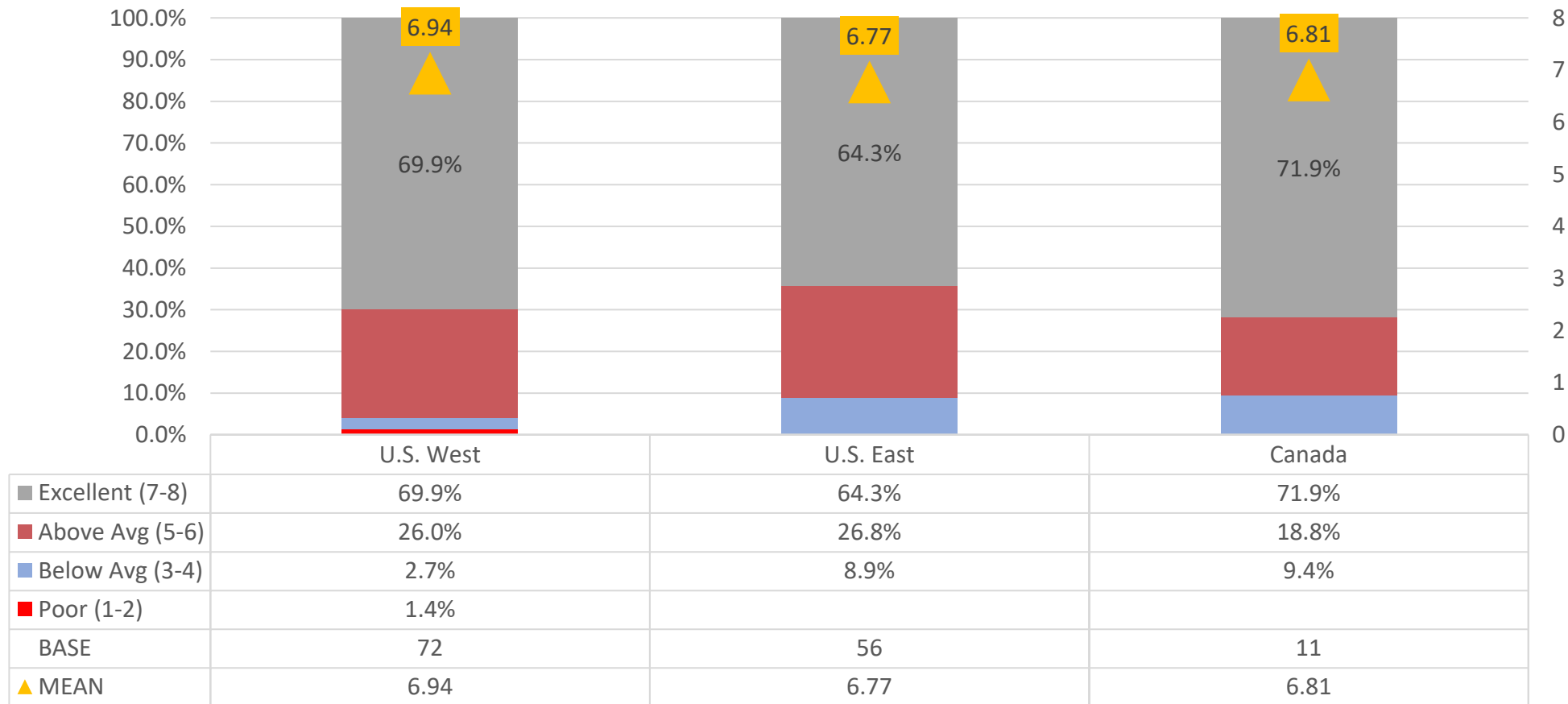
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



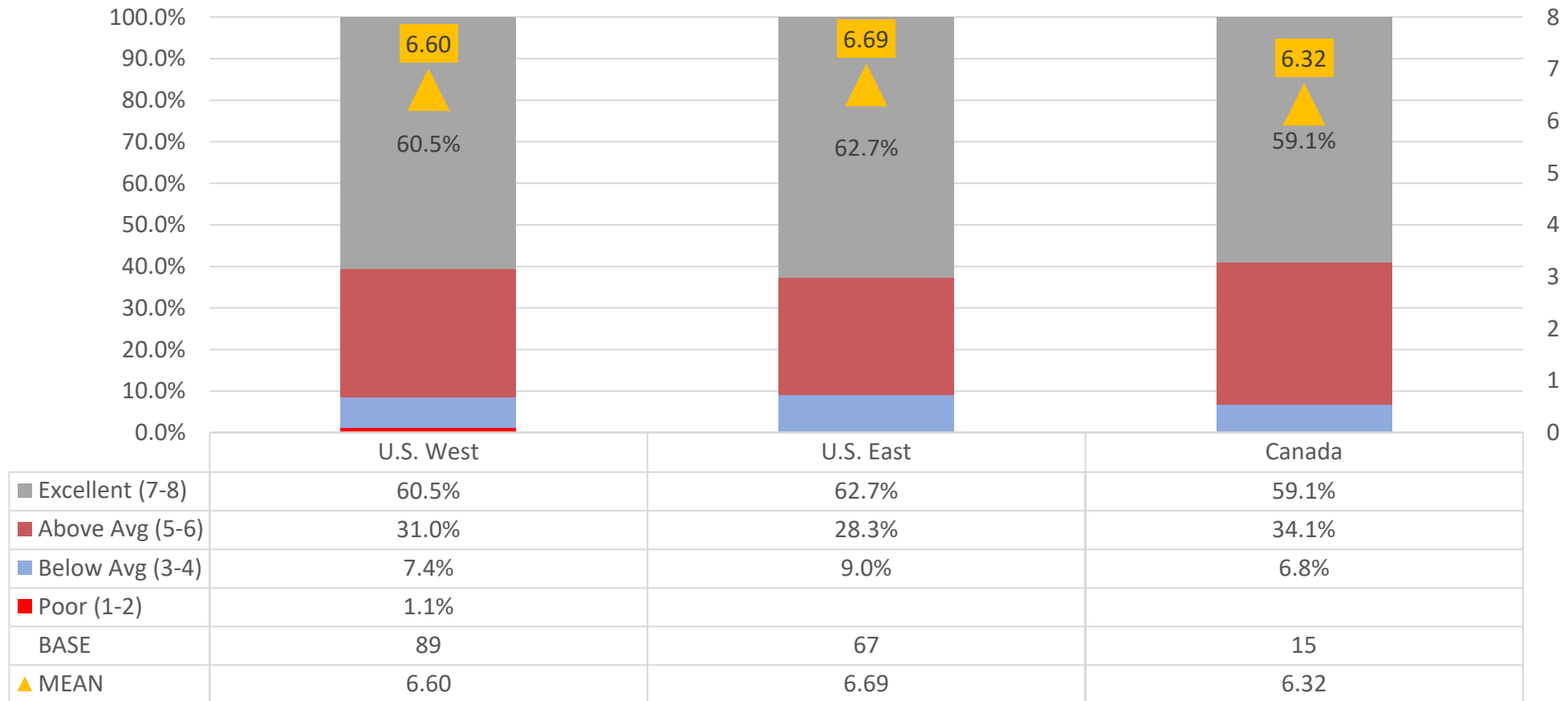
OVERALL ACCESSIBILITY - HOTELS

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



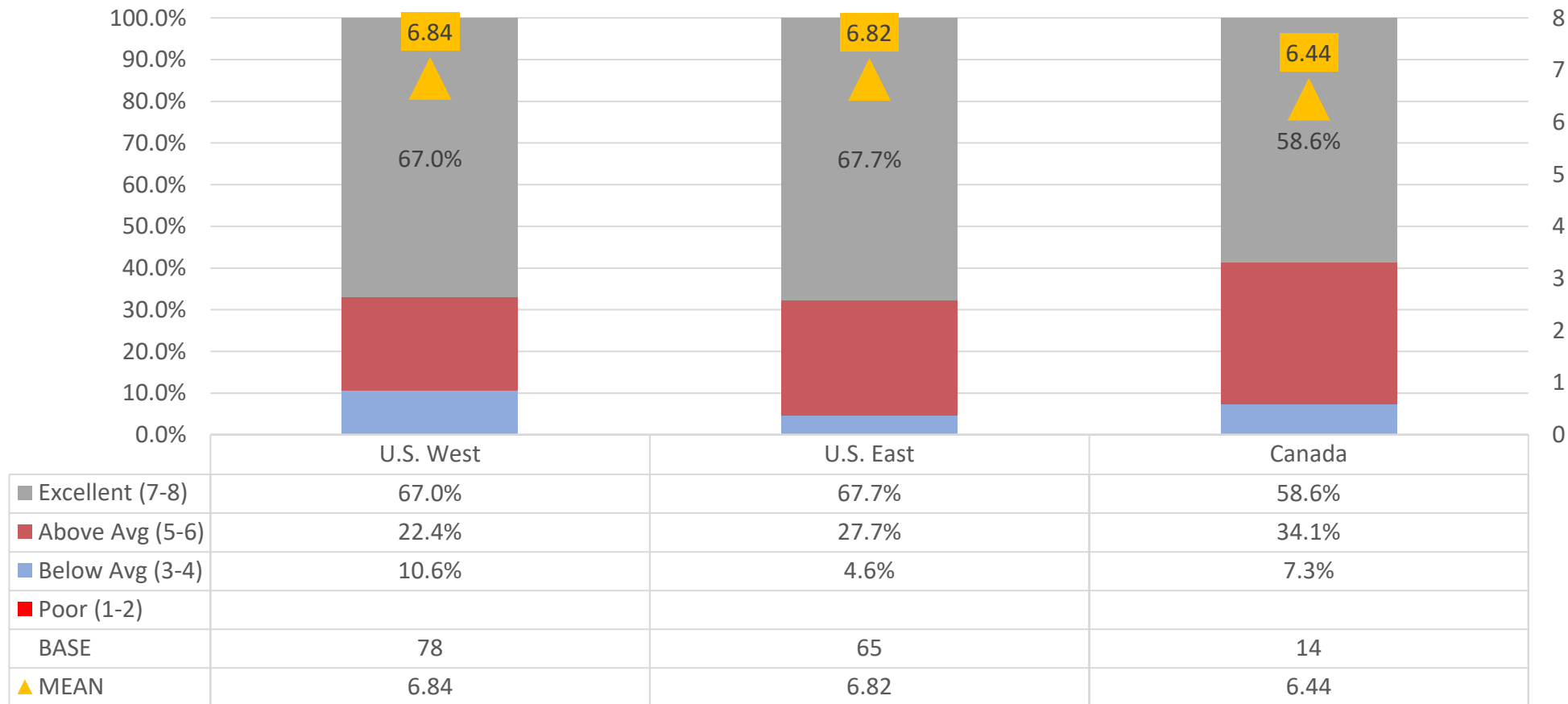
OVERALL ACCESSIBILITY - RESTAURANTS

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



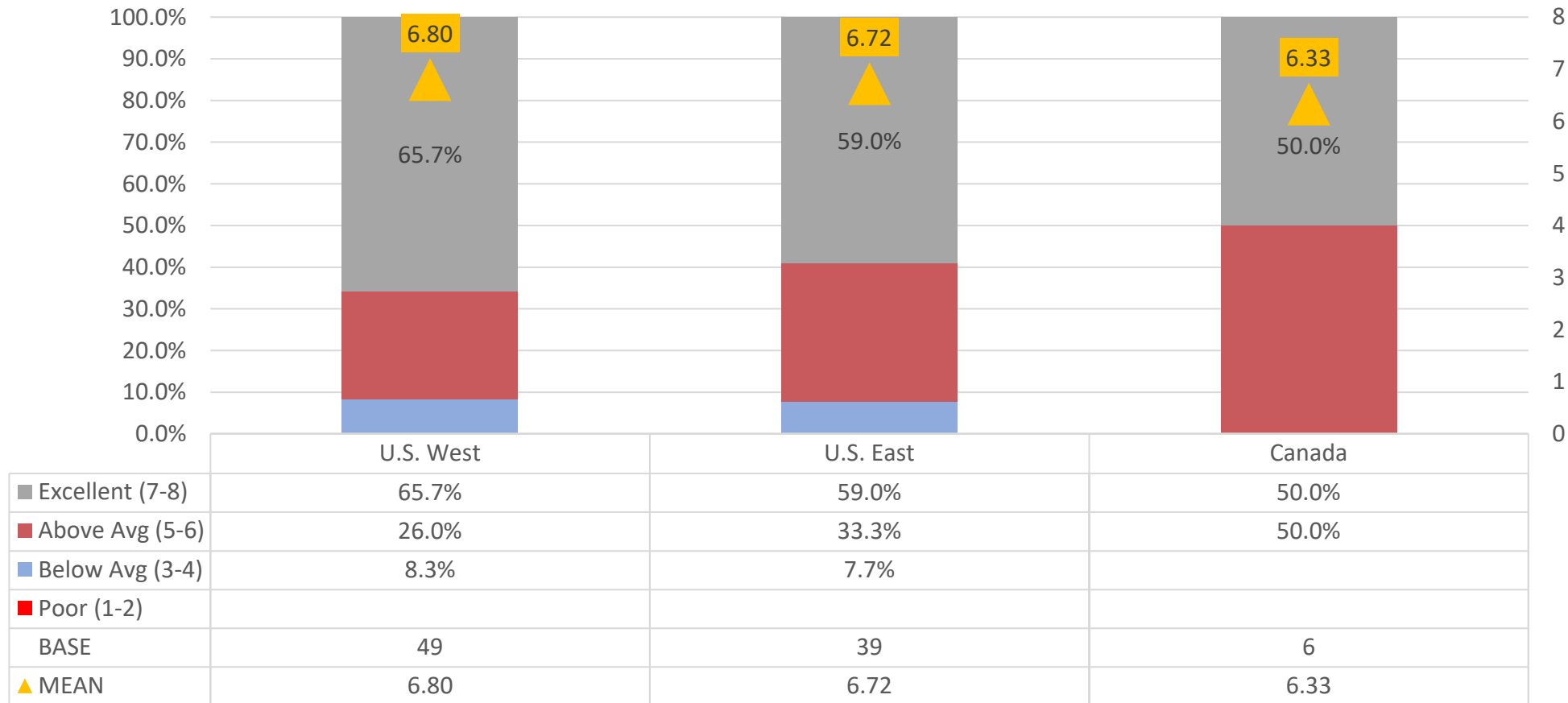
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



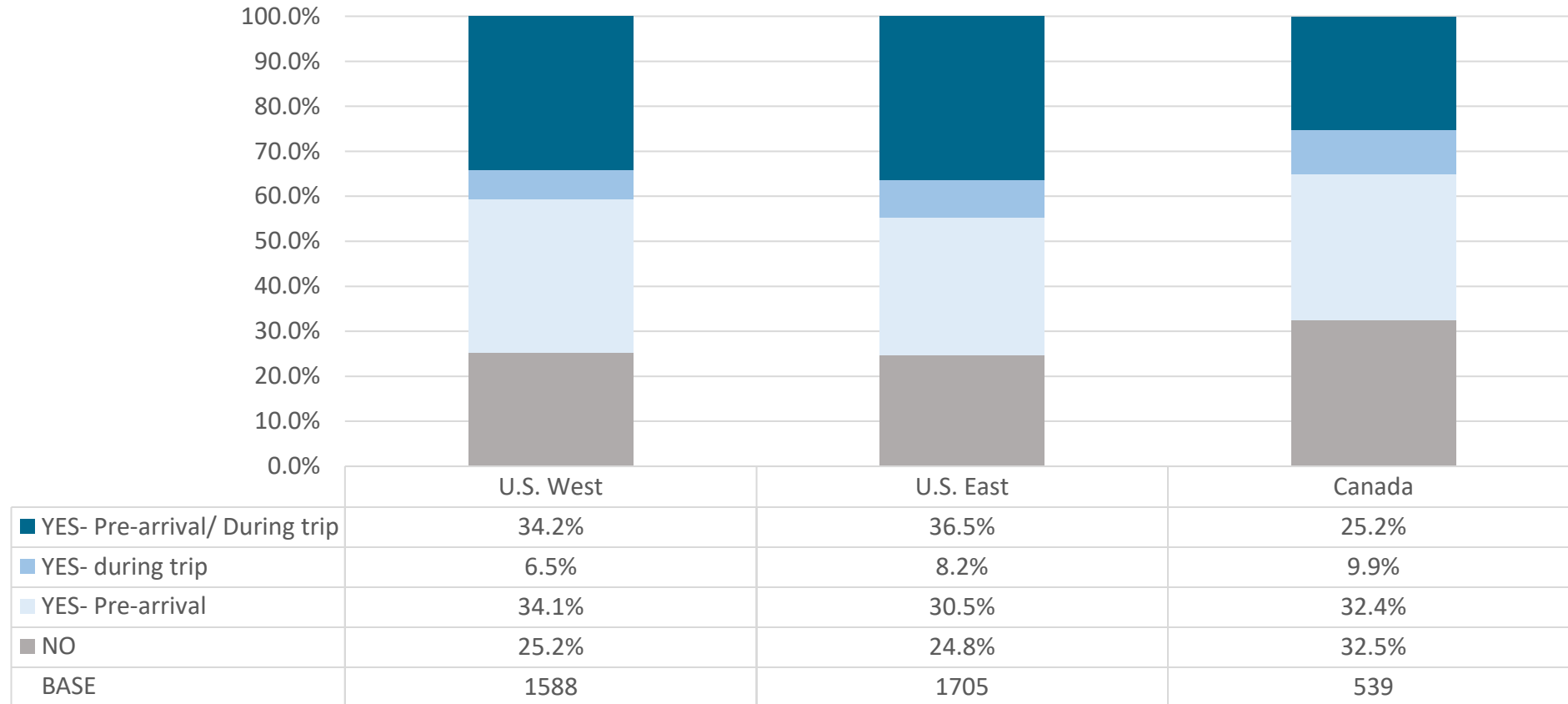
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

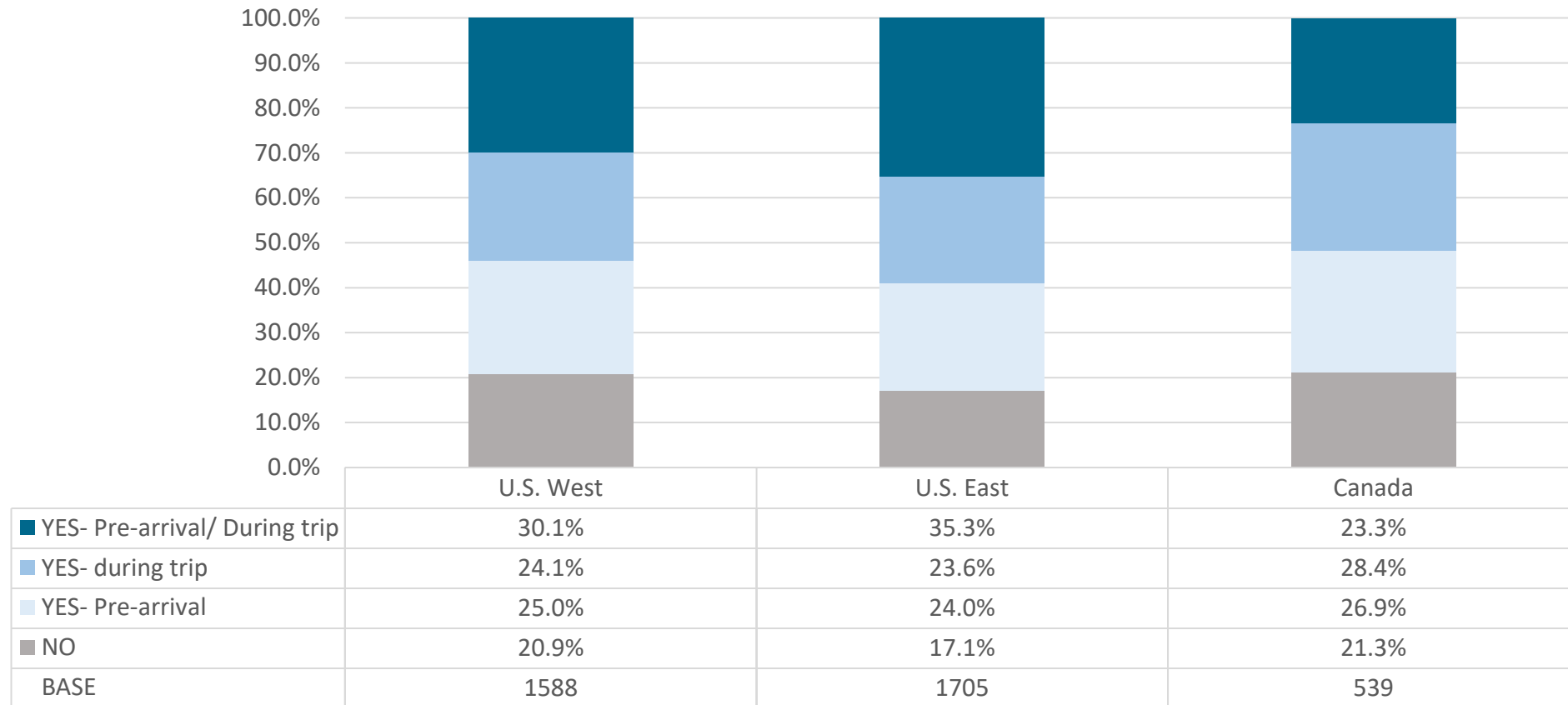


Section 4 – Alternative Messaging

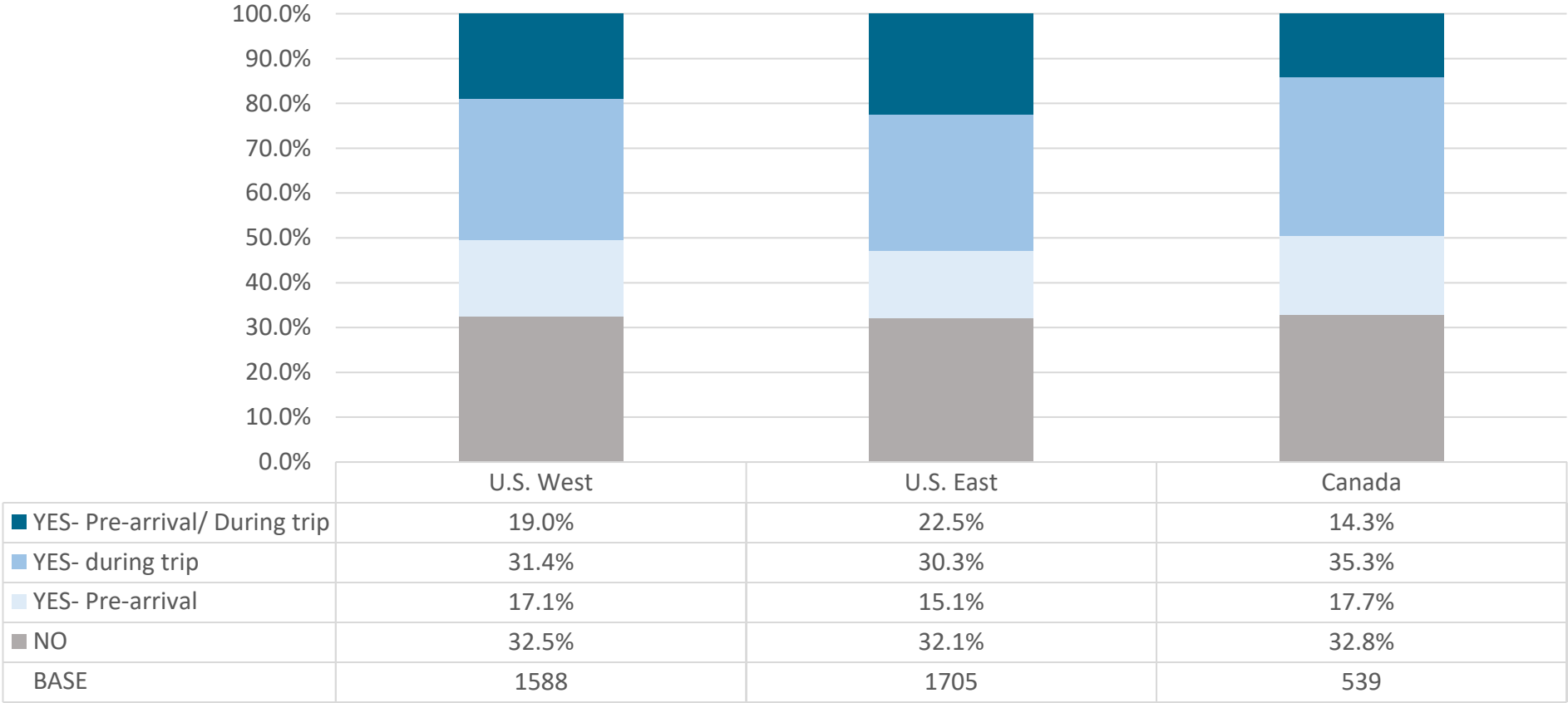
SAFE AND RESPONSIBLE TRAVEL



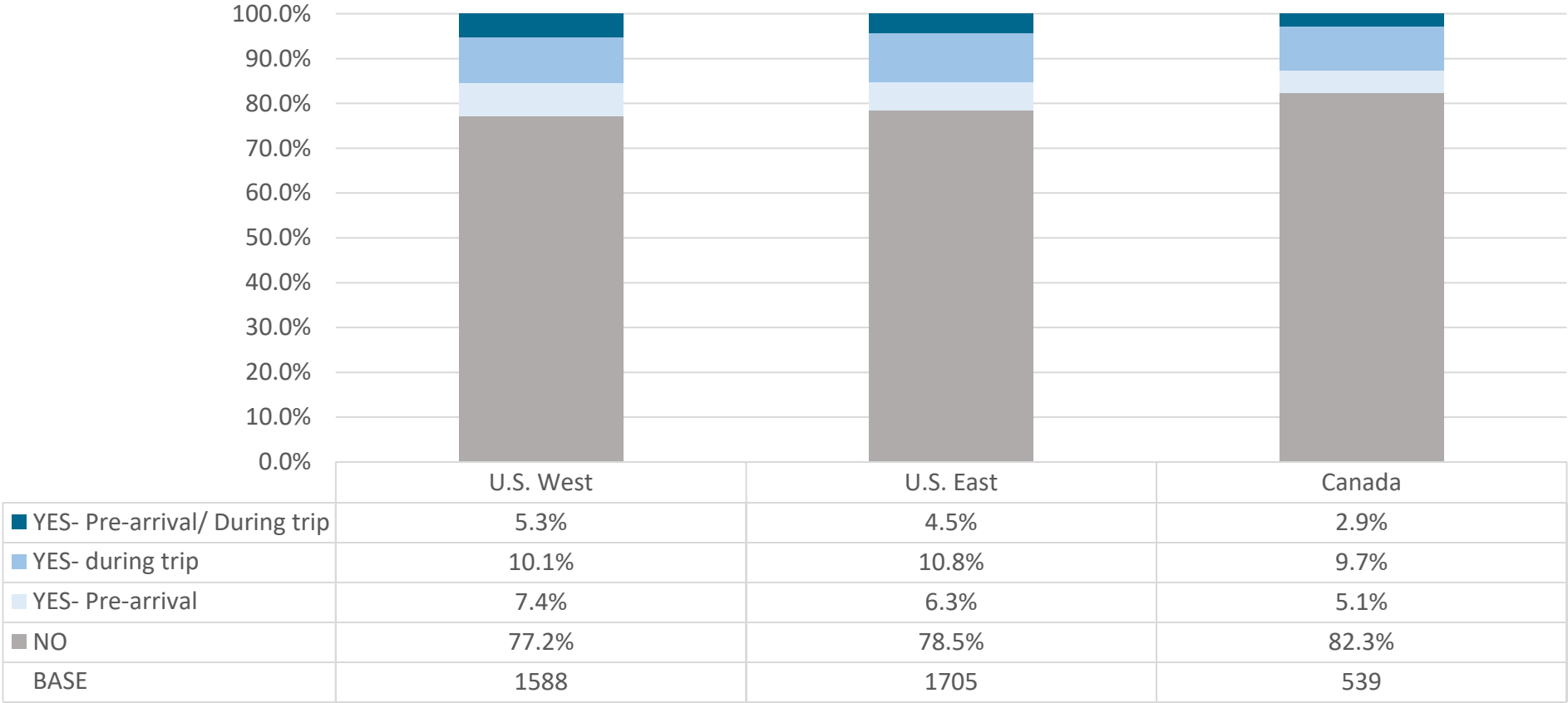
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE, AND ENVIRONMENT



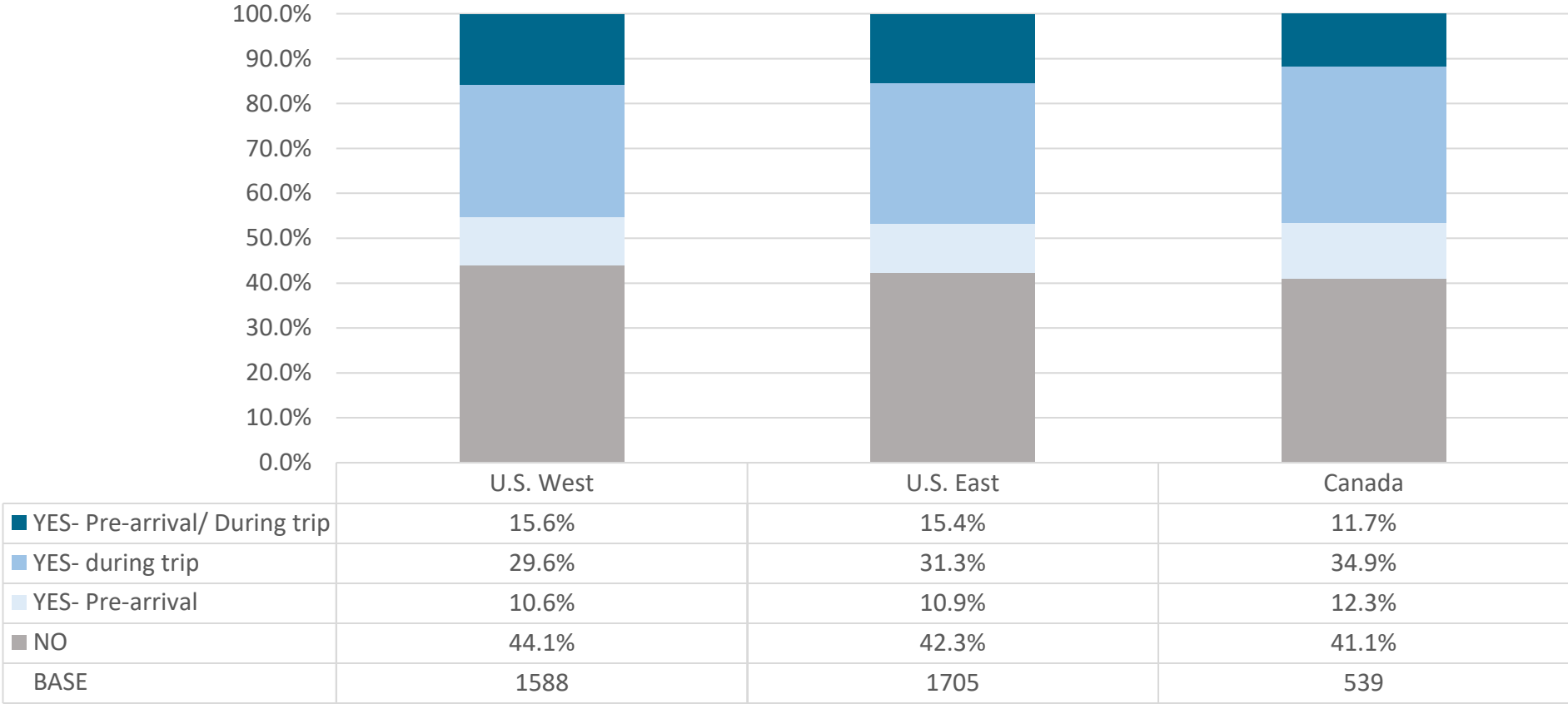
OCEAN AND HIKING SAFETY



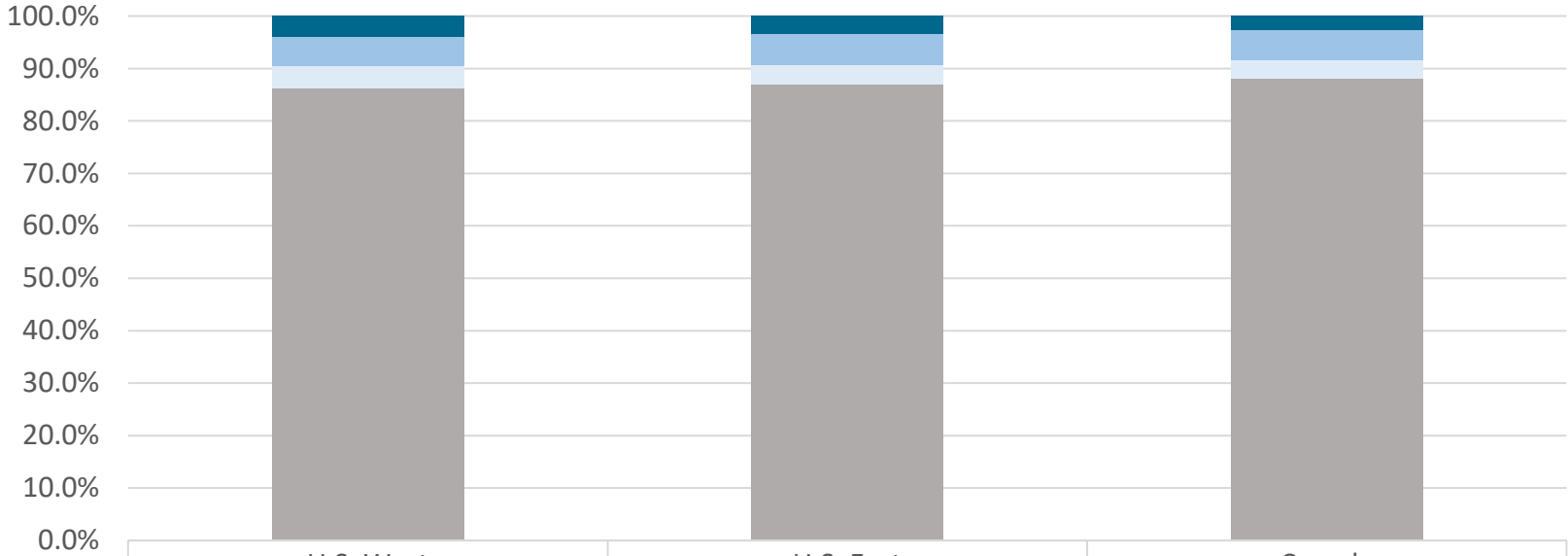
VOLUNTEER/ GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL/ SHOP LOCAL



MALAMA HAWAI'I

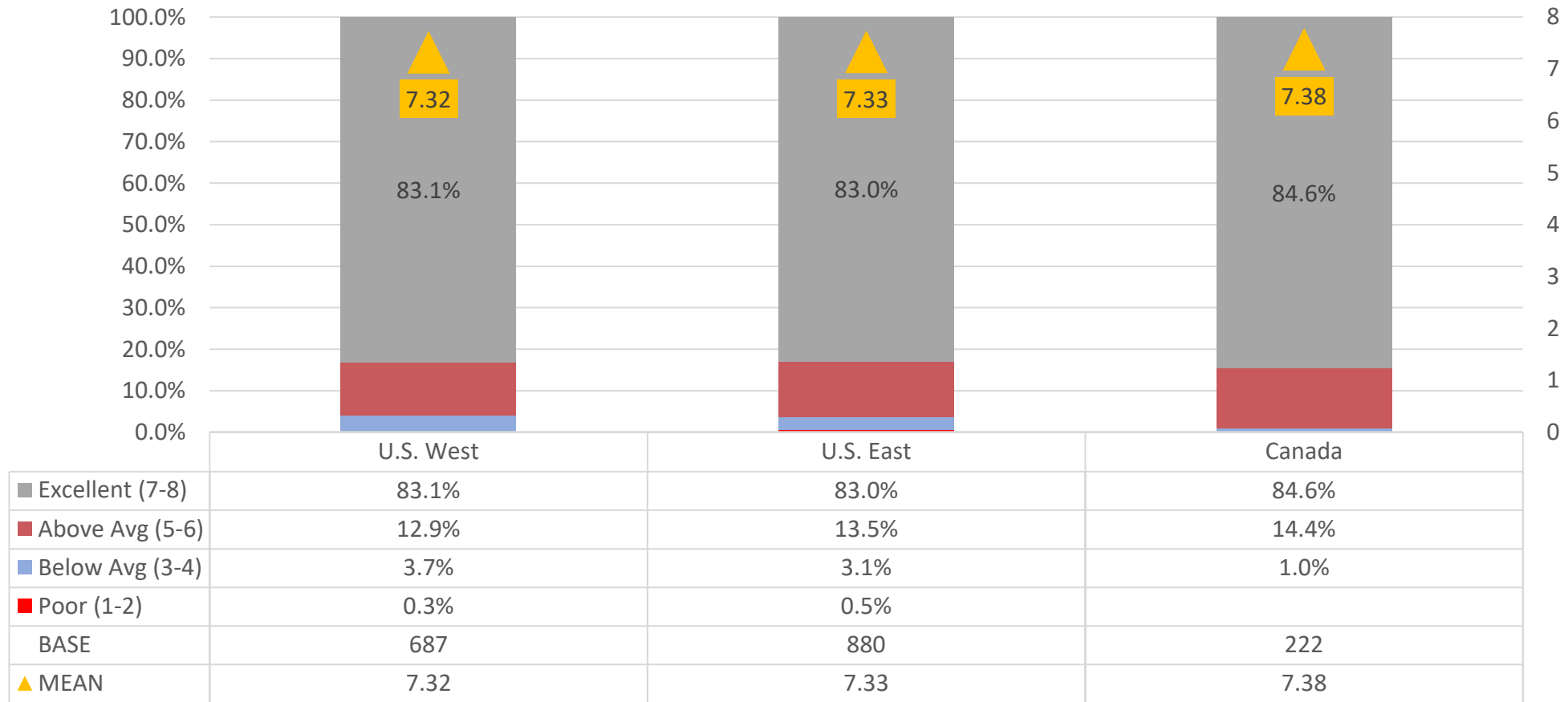


	U.S. West	U.S. East	Canada
■ YES- Pre-arrival/ During trip	4.1%	3.4%	2.7%
■ YES- during trip	5.5%	5.8%	5.6%
■ YES- Pre-arrival	4.1%	3.7%	3.6%
■ NO	86.3%	87.1%	88.1%
BASE	1588	1705	539

Section 5 – O'AHU

SATISFACTION - O'AHU

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

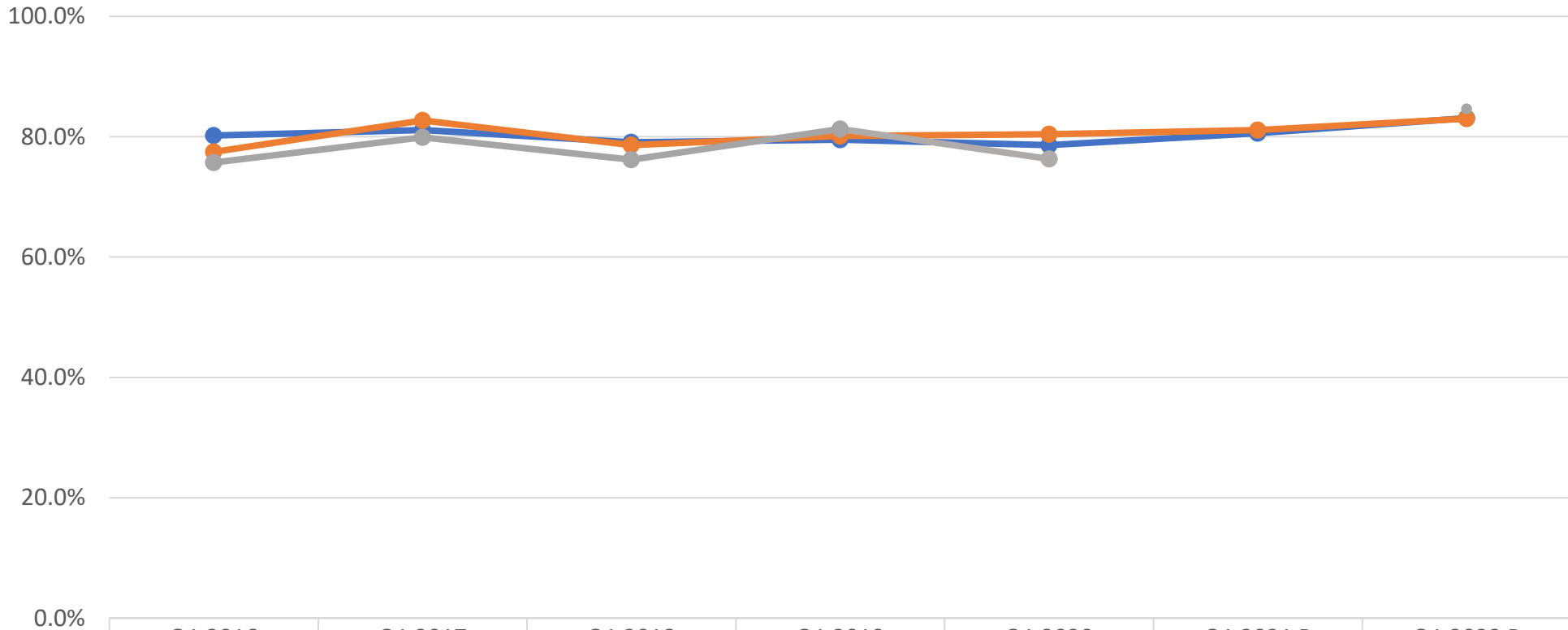


SATISFACTION - O'AHU

- **Islands visited:** Visitors from U.S. West and U.S. East whose trip was limited to just O'ahu gave higher satisfaction scores to the island compared to those who also visited a Neighbor Island during their stay.
- **Age:** Amongst visitors from U.S. West, satisfaction is highest amongst young adults under the age of 35 and is lowest amongst visitors between the ages of 50-64 from this visitor market.
- **Gender:** Female respondents from U.S. East gave higher satisfaction scores than males from this visitor market.
- **Household income:** Those travelers from U.S. East in the bottom incomes tier (<\$100K) express the highest levels of satisfaction.

SATISFACTION - O'AHU

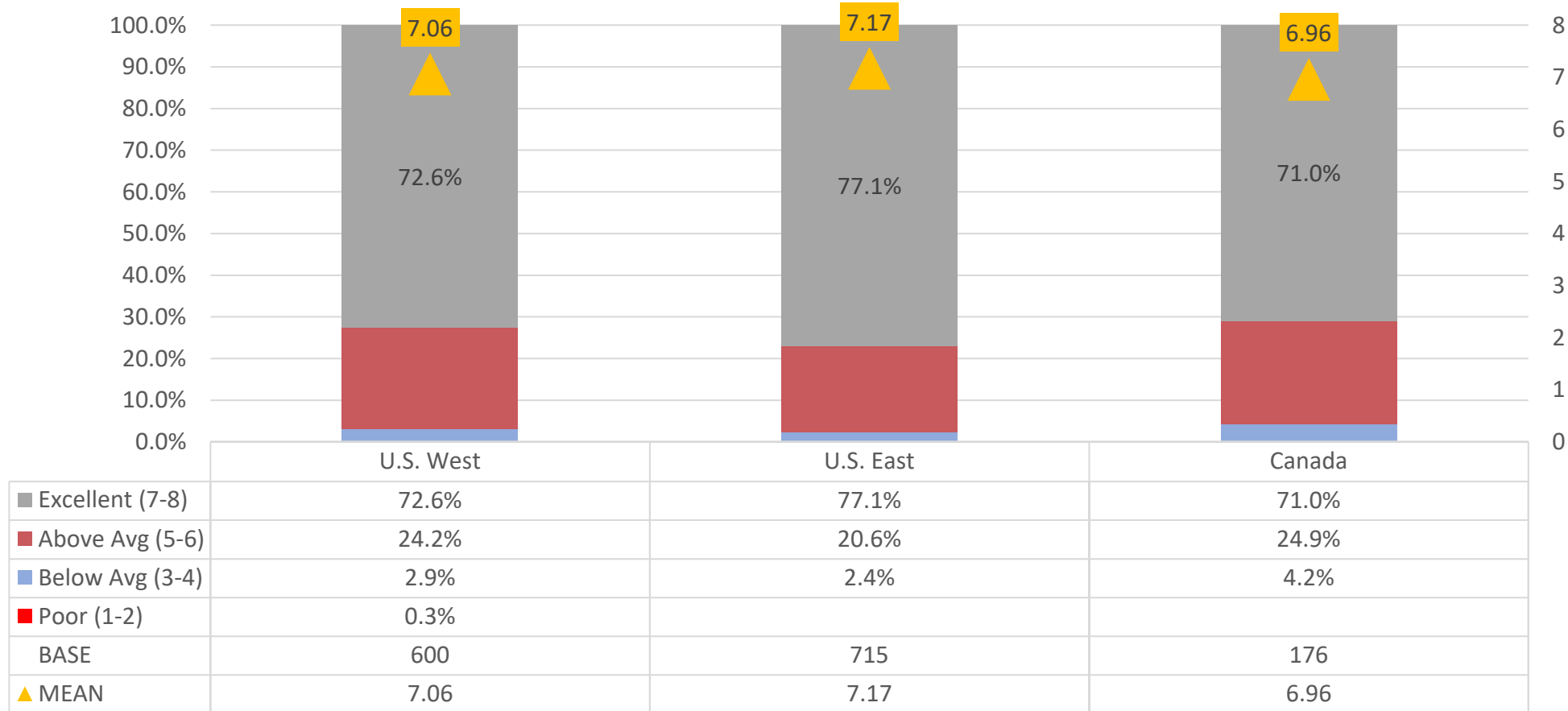
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	80.2%	81.1%	79.1%	79.5%	78.6%	80.6%	83.1%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.4%	81.1%	83.0%
Canada	75.7%	79.9%	76.2%	81.3%	76.3%		84.6%

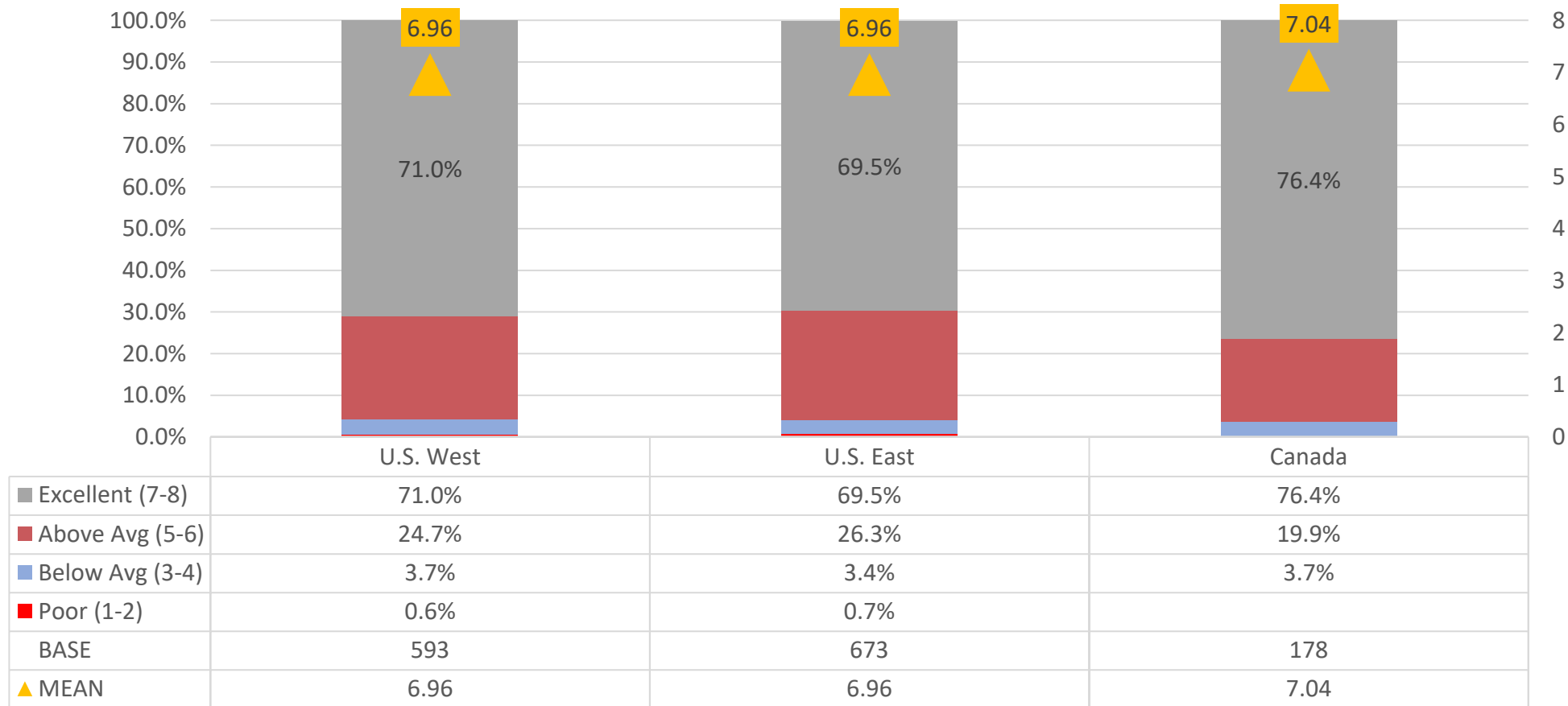
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



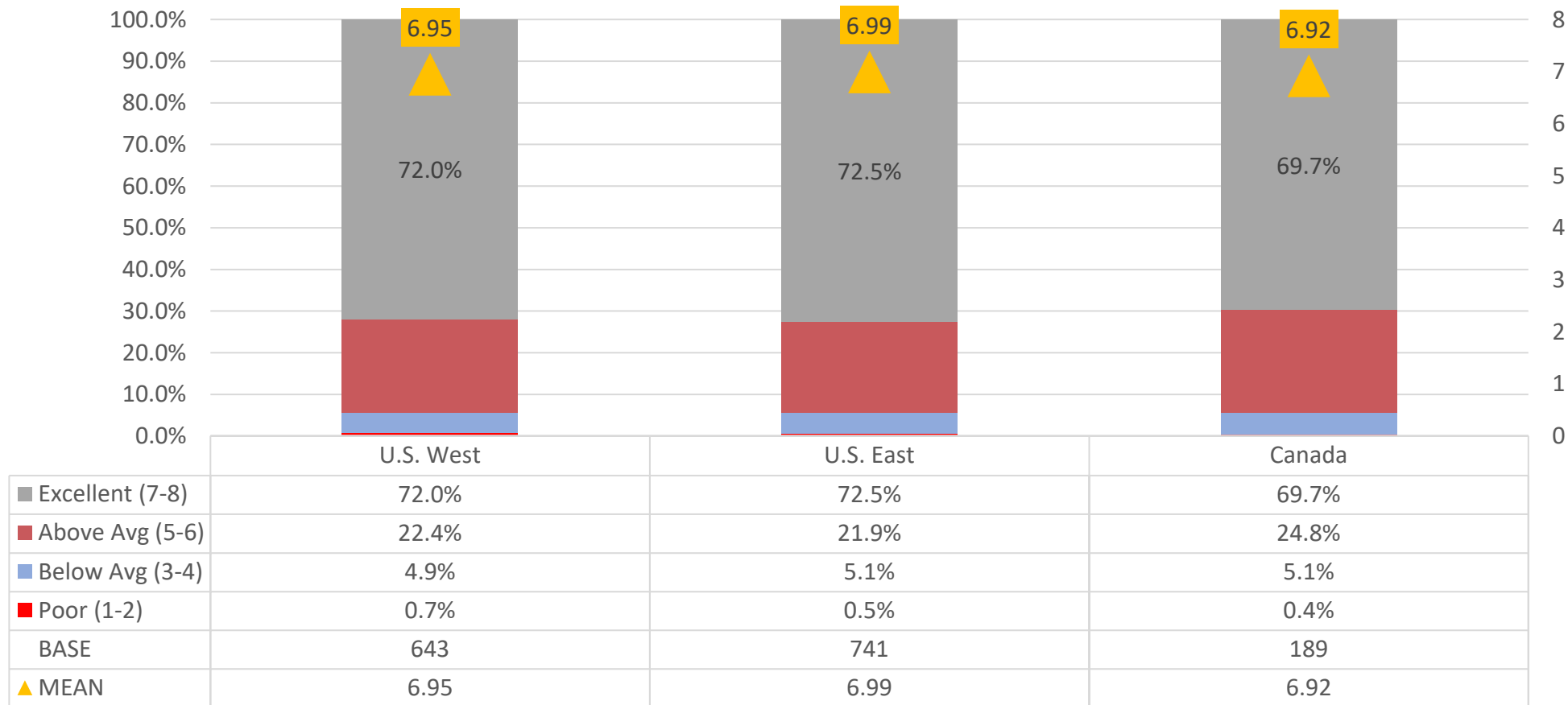
SHOPPING - O'AHU

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



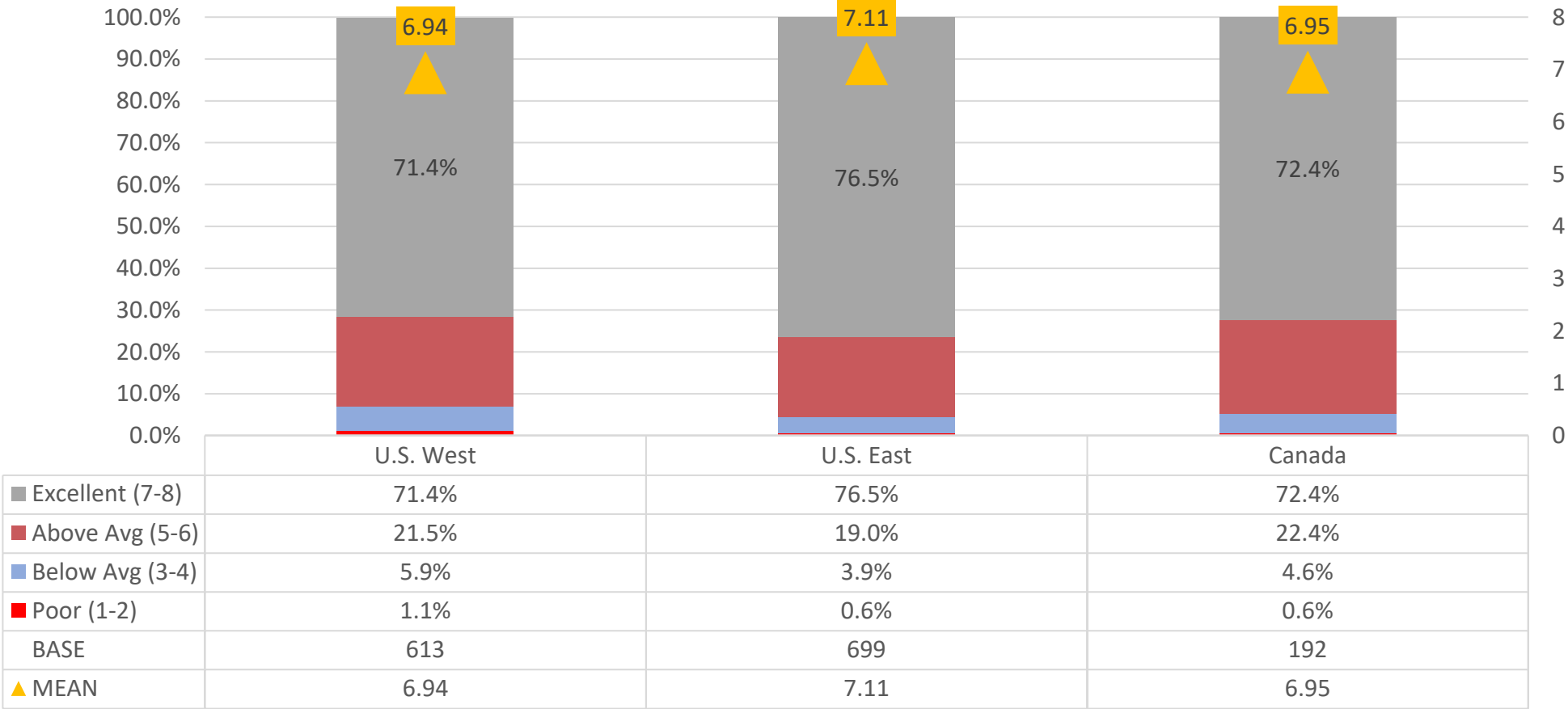
DINING/ FOOD & BEVERAGES - O'AHU

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



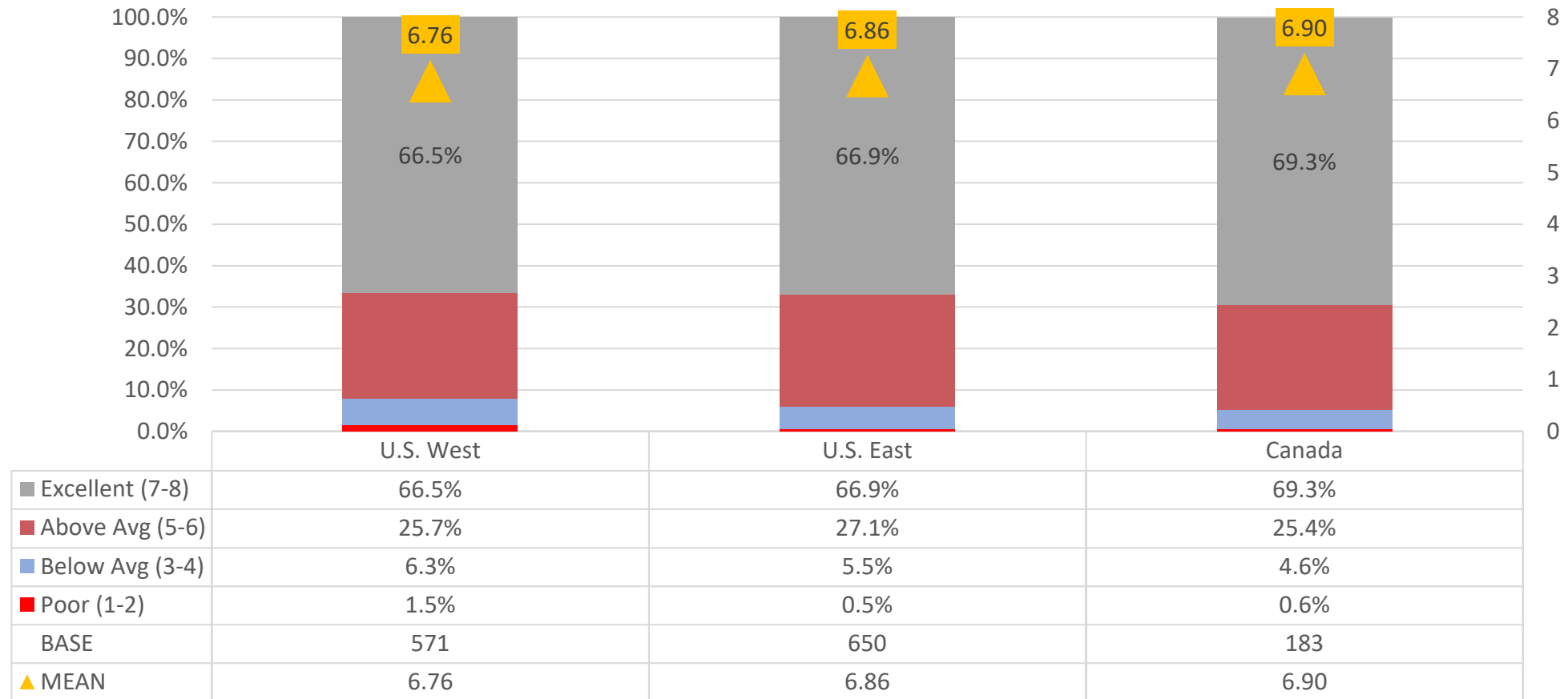
LODGING/ ACOMMODATIONS - O'AHU

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



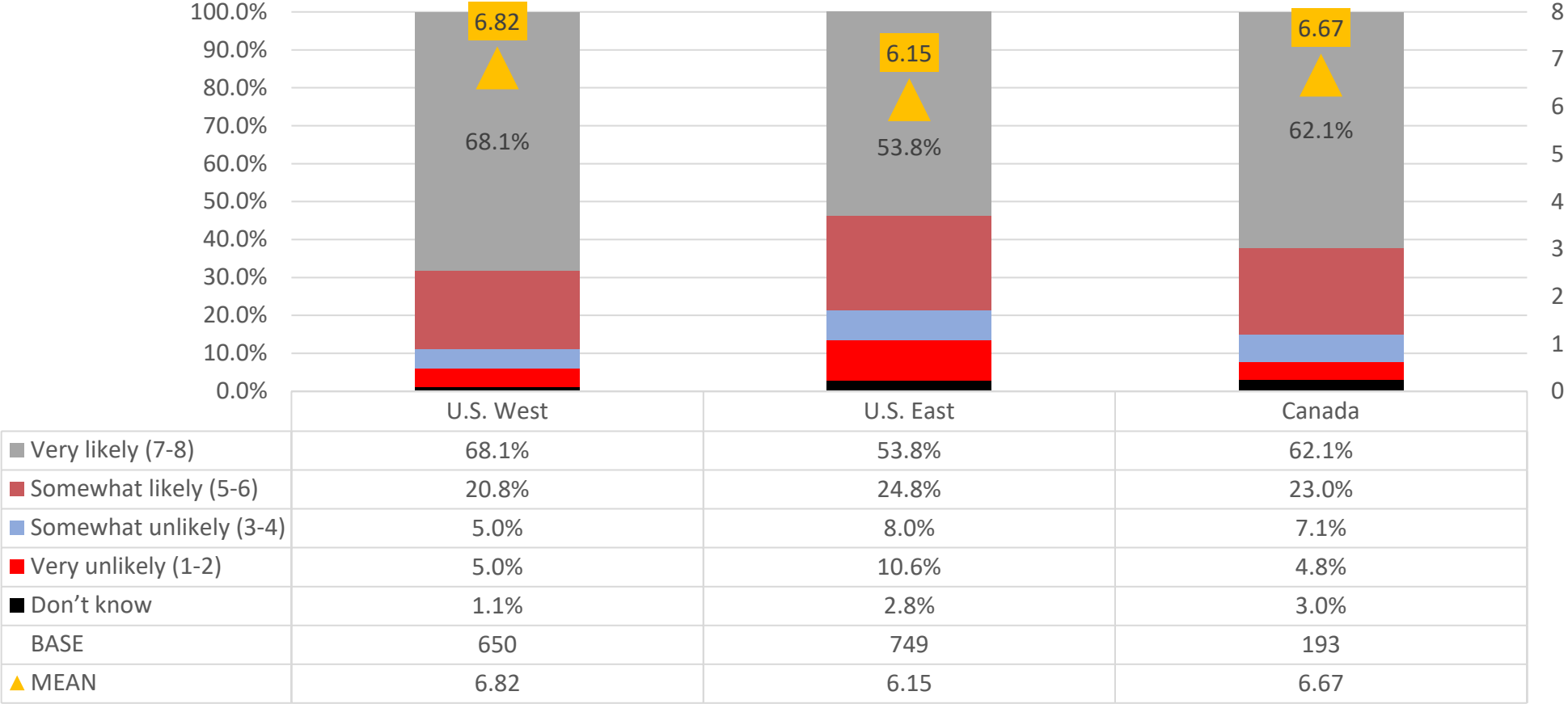
TRANSPORTATION ON ISLAND - O'AHU

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



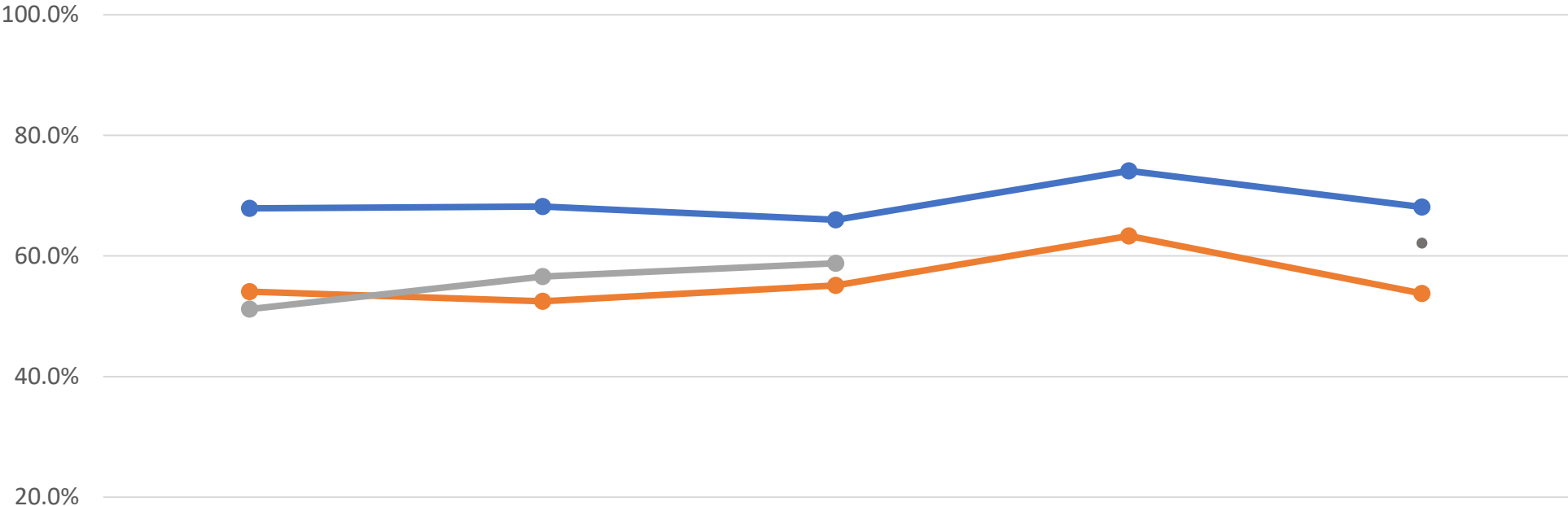
LIKELIHOOD OF RETURN VISIT - O'AHU

8-pt Rating Scale
8=Very likely/ 1=Very unlikely



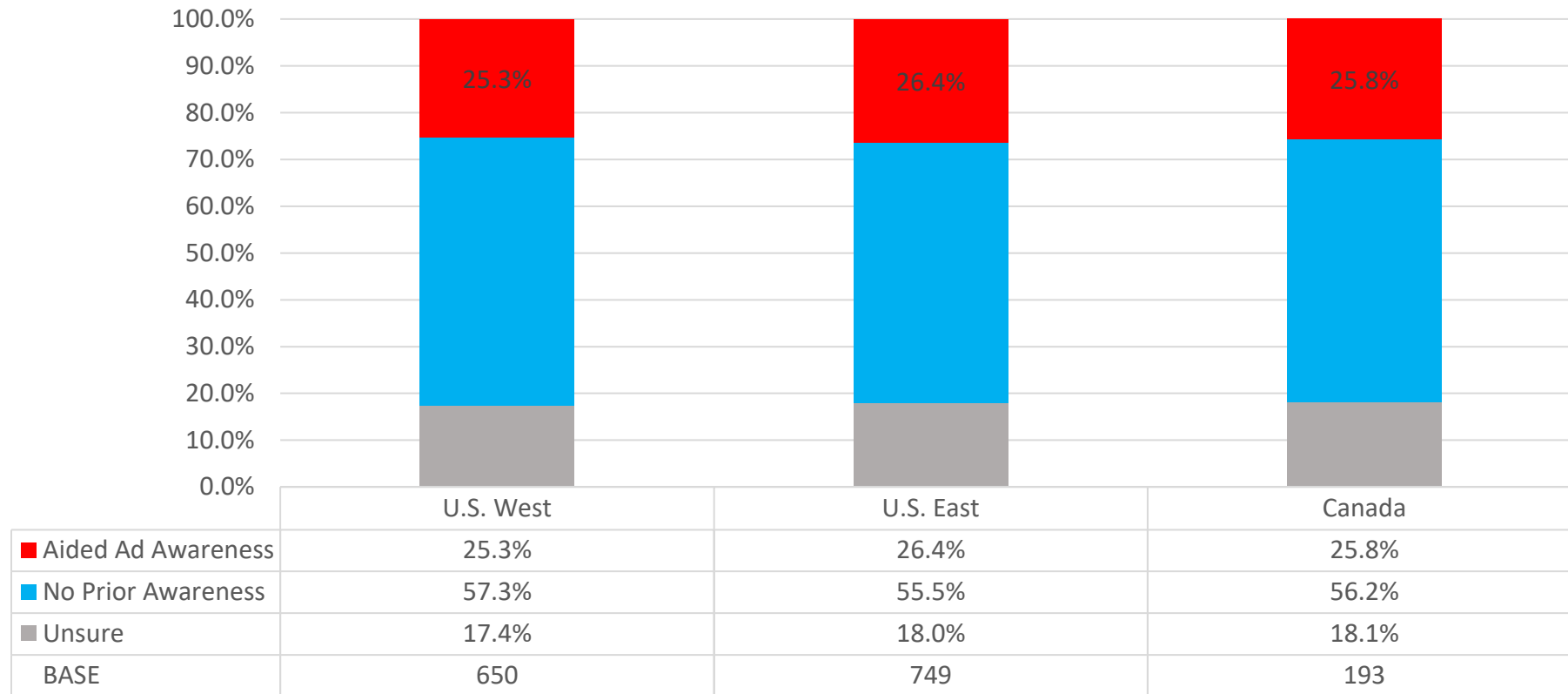
LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	67.9%	68.2%	66.0%	74.1%	68.1%
U.S. East	54.1%	52.5%	55.1%	63.3%	53.8%
Canada	51.2%	56.6%	58.8%		62.1%

AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	37.9%	44.2%	40.4%
Outdoor or sporting activities/ events	18.8%	13.6%	13.7%
Hawaiian cultural events	15.3%	12.4%	10.5%
Social media posts/ videos	12.0%	11.6%	11.7%
Hawaiian music	8.2%	4.7%	2.8%
Television programs or movies filmed in Hawai'i	9.2%	12.2%	13.1%
BASE	650	749	193

ATTRACTIONS- O'AHU

	U.S. West	U.S. East	Canada
Atlantis Submarine & Cruises	2.5%	4.0%	2.8%
Bernice P. Bishop Museum	4.0%	3.7%	3.4%
Byodo In Temple	11.6%	10.2%	9.1%
Chinatown & Honolulu Art District	13.6%	10.0%	13.9%
Diamond Head State Monument	25.9%	37.4%	42.2%
Dole Plantation	31.0%	33.6%	36.1%
Foster Botanical Garden	3.7%	4.0%	5.9%
Haleiwa	20.9%	21.2%	20.4%
Hanauma Bay Nature Reserve	11.6%	13.0%	15.3%
Harold L. Lyon Arboretum	0.3%	0.8%	0.4%
Hawai'i State Art Museum	1.1%	0.7%	1.0%
Honolulu Museum of Art	1.5%	1.6%	2.6%
Hawaiian Mission Houses, Historic Site and Archive	1.1%	1.2%	0.0%
Hawai'i's Plantation Village	1.8%	0.7%	1.6%
Honolulu Zoo	5.5%	7.1%	8.7%

ATTRACTIONS- O'AHU

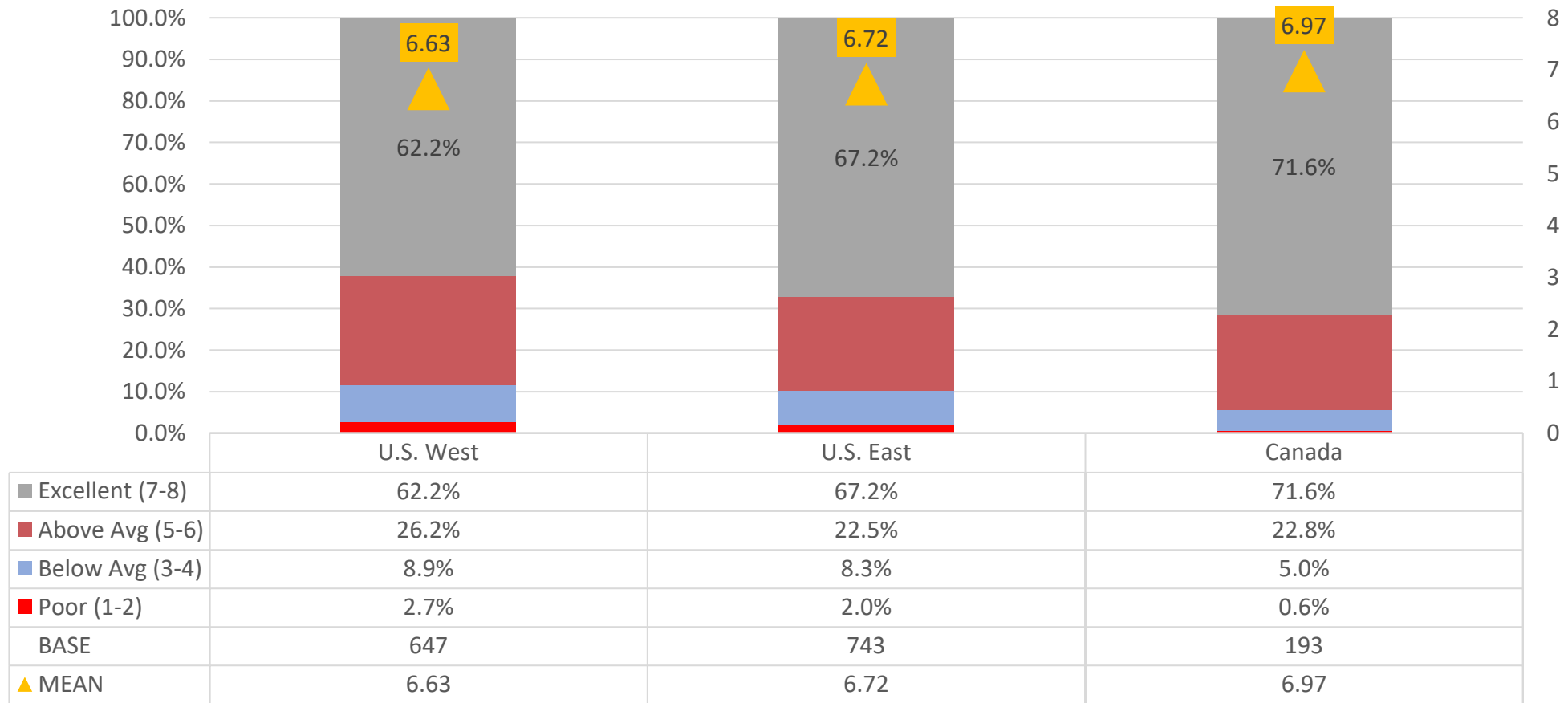
	U.S. West	U.S. East	Canada
Ho'omaluhia Botanical Garden	6.0%	6.0%	4.6%
Iolani Palace State Monument	4.7%	5.5%	5.2%
Kailua Town	14.8%	13.0%	19.8%
Kaiwi State Scenic Shoreline/ Makapuu Trail	5.9%	7.4%	7.9%
Kakaako Street Art	1.7%	1.9%	1.8%
Koko Head Crater Trail	5.7%	6.7%	10.1%
Kualoa Private Nature Reserve	15.4%	15.6%	15.9%
Lanikai or Kailua Beach	28.8%	30.4%	38.3%
Manoa Falls & Trail	9.1%	13.1%	11.7%
National Memorial Cemetery of the Pacific	7.8%	11.5%	5.4%
Nuuanu Pali Lookout	10.1%	12.2%	14.1%
North Shore Beaches	46.9%	53.1%	51.4%

ATTRACTIONS- O'AHU

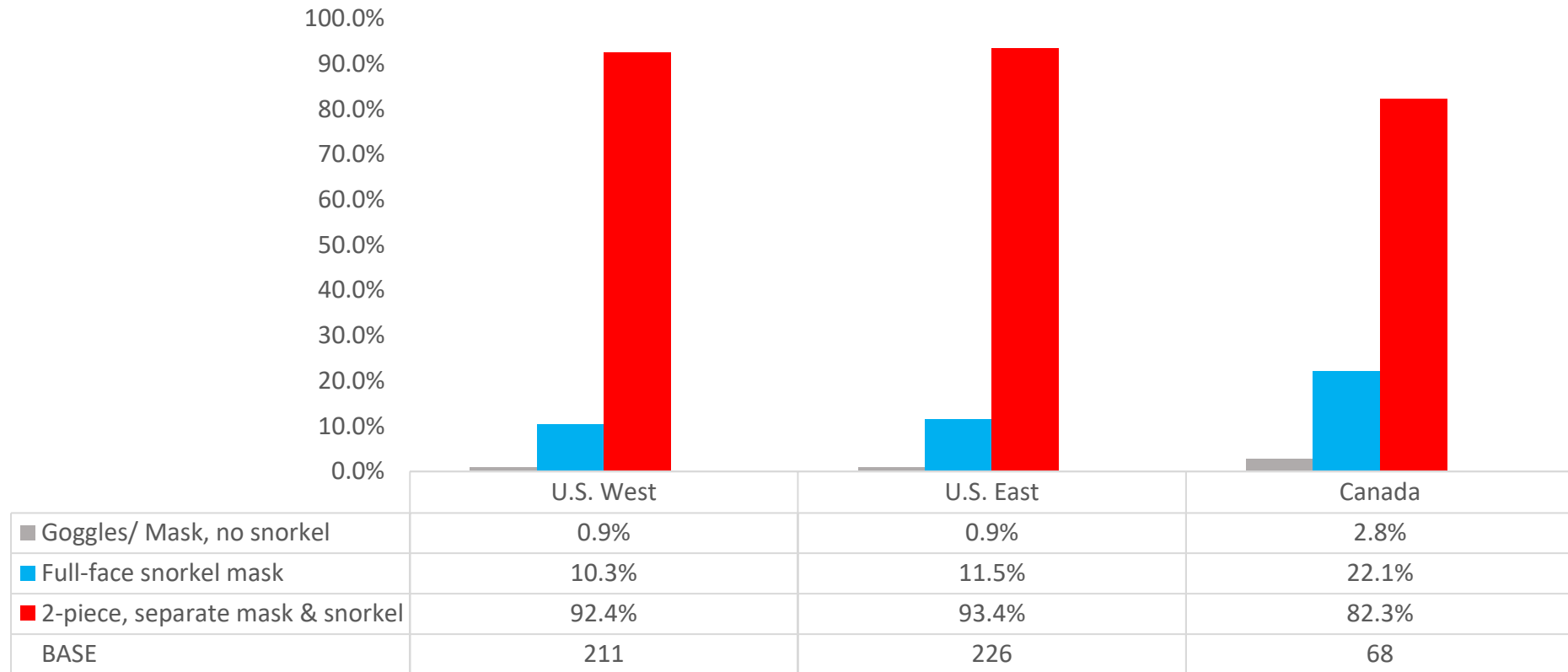
	U.S. West	U.S. East	Canada
Pearl Harbor National Memorial	30.2%	49.0%	28.9%
Battleship Missouri Memorial	10.0%	18.9%	14.9%
Pearl Harbor Aviation Museum	9.4%	13.8%	14.7%
Pacific Fleet Submarine Museum	3.5%	5.2%	7.3%
Polynesian Cultural Center	13.6%	13.1%	13.5%
Queen Emma's Summer Palace	0.9%	1.9%	0.6%
Sea Life Park Hawai'i	2.3%	2.0%	3.8%
Waikiki Aquarium	4.4%	4.0%	8.9%
Waimanalo Beach Park	10.3%	12.4%	16.9%
Waimea Valley	16.5%	20.9%	13.3%

DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



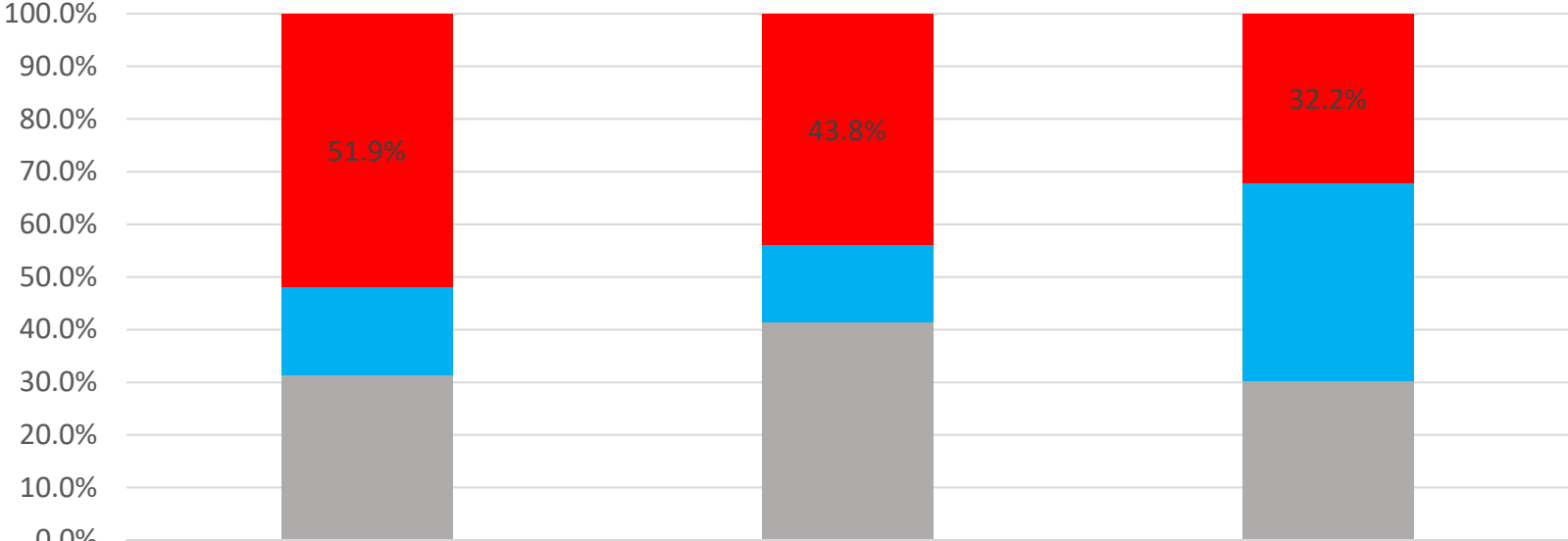
SNORKELING EQUIPMENT USED - O'AHU



SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	97.1%	98.2%	98.3%
Yes, needed assistance using 2 piece mask & snorkel	2.9%	1.8%	1.7%
Yes, while doing another type of ocean activity	0%	0%	0%
BASE	209	224	66

CAR RENTAL - O'AHU



	U.S. West	U.S. East	Canada
■ Rented entire stay	51.9%	43.8%	32.2%
■ Rented portion of stay	16.8%	14.8%	37.7%
■ Did NOT rent a car	31.4%	41.4%	30.2%
BASE	650	749	193

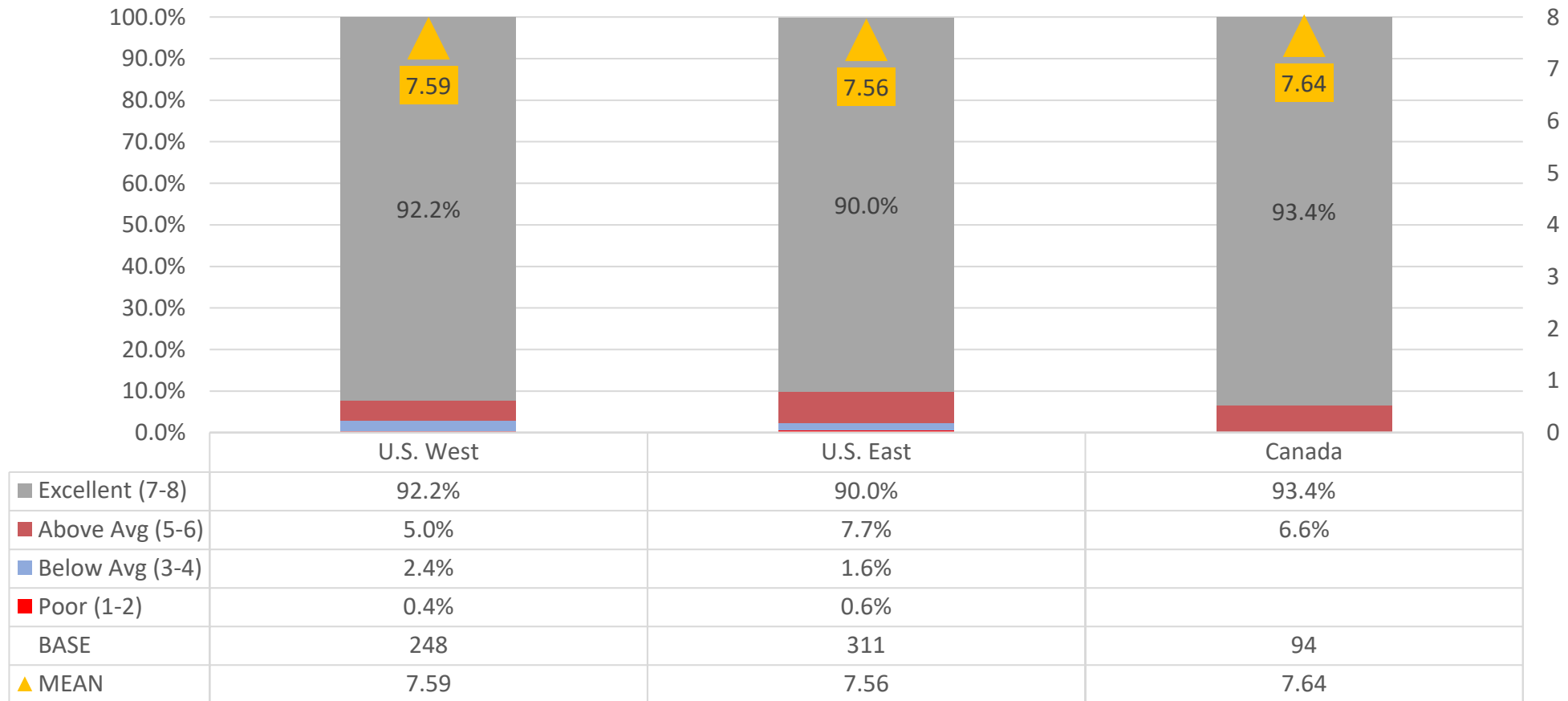
REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Canada
I only needed a vehicle on certain days	77.1%	76.6%	63.2%
Parking was too expensive at my hotel/ lodging	47.1%	30.6%	40.0%
Car rental rates were too expensive	29.9%	26.1%	41.6%
Vehicles were not available for all of my trip dates	2.0%	2.7%	5.8%
BASE	109	111	74

Section 6 – KAUA‘I

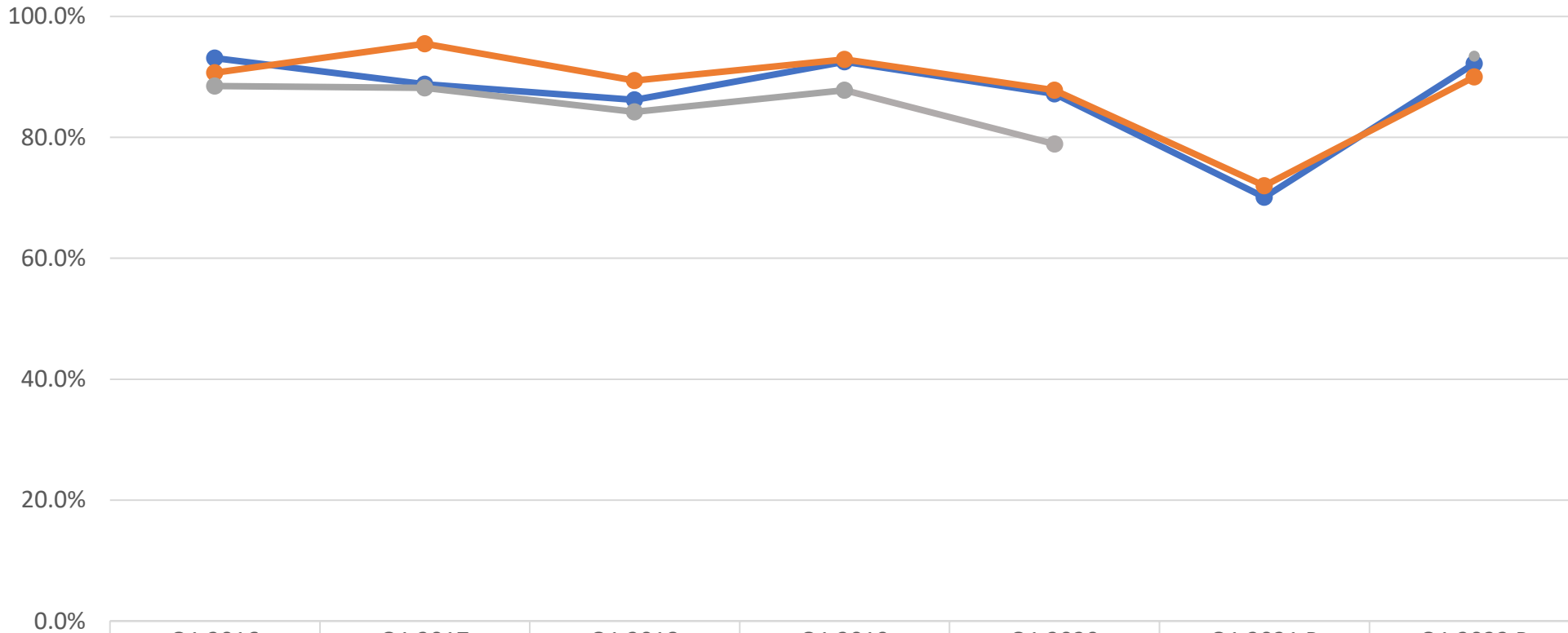
SATISFACTION - KAUUA'I

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



SATISFACTION - KAUA'I

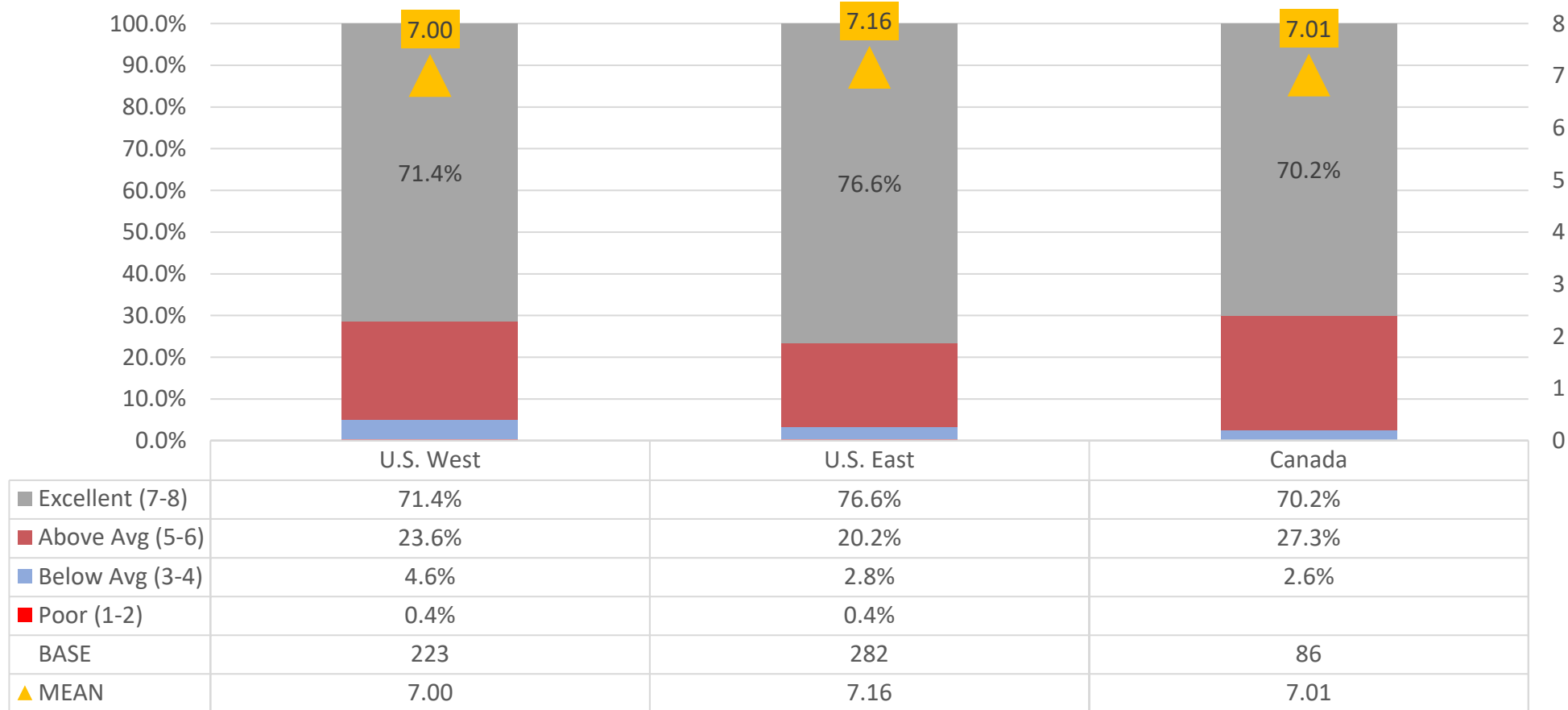
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	93.1%	88.8%	86.2%	92.5%	87.2%	70.1%	92.2%
U.S. East	90.7%	95.5%	89.4%	92.9%	87.8%	72.0%	90.0%
Canada	88.5%	88.2%	84.2%	87.8%	78.9%		93.4%

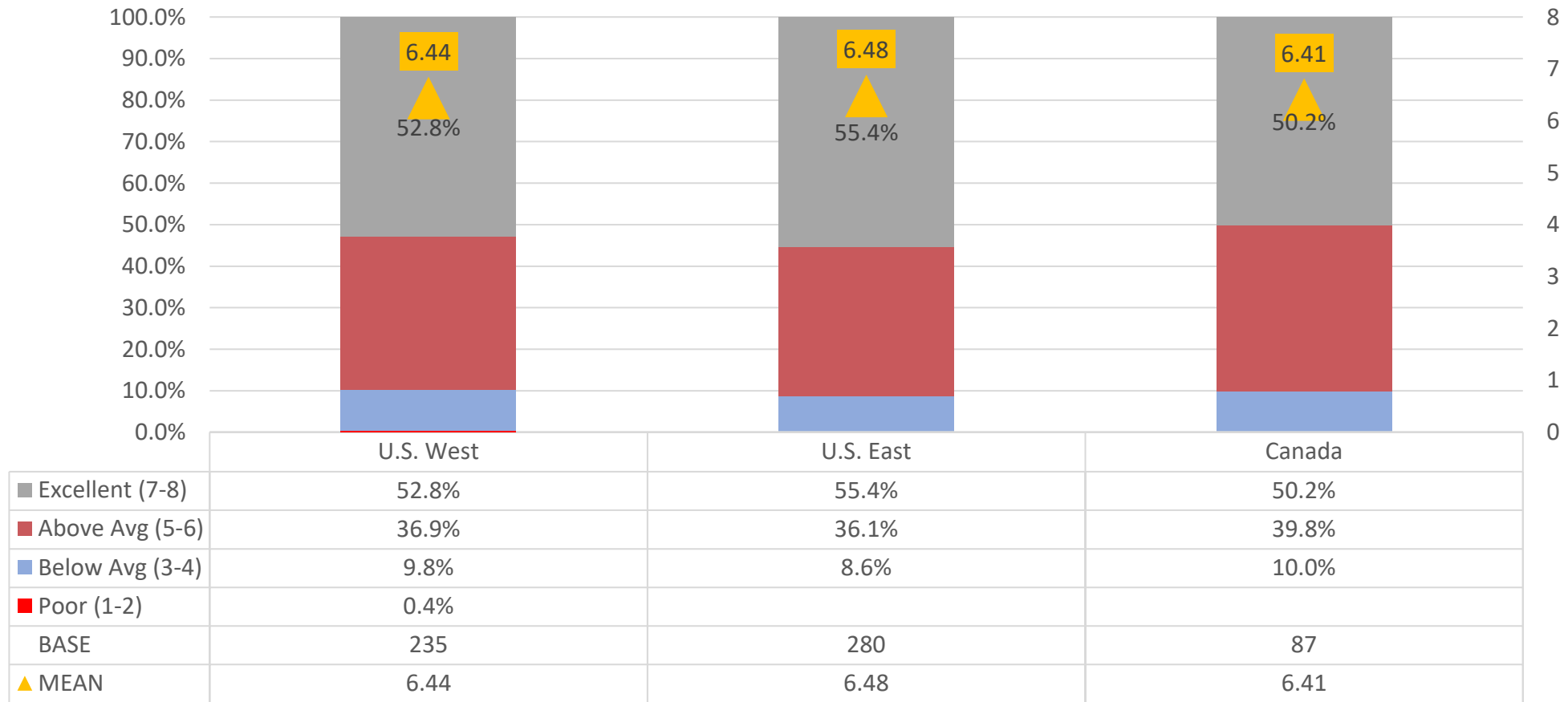
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



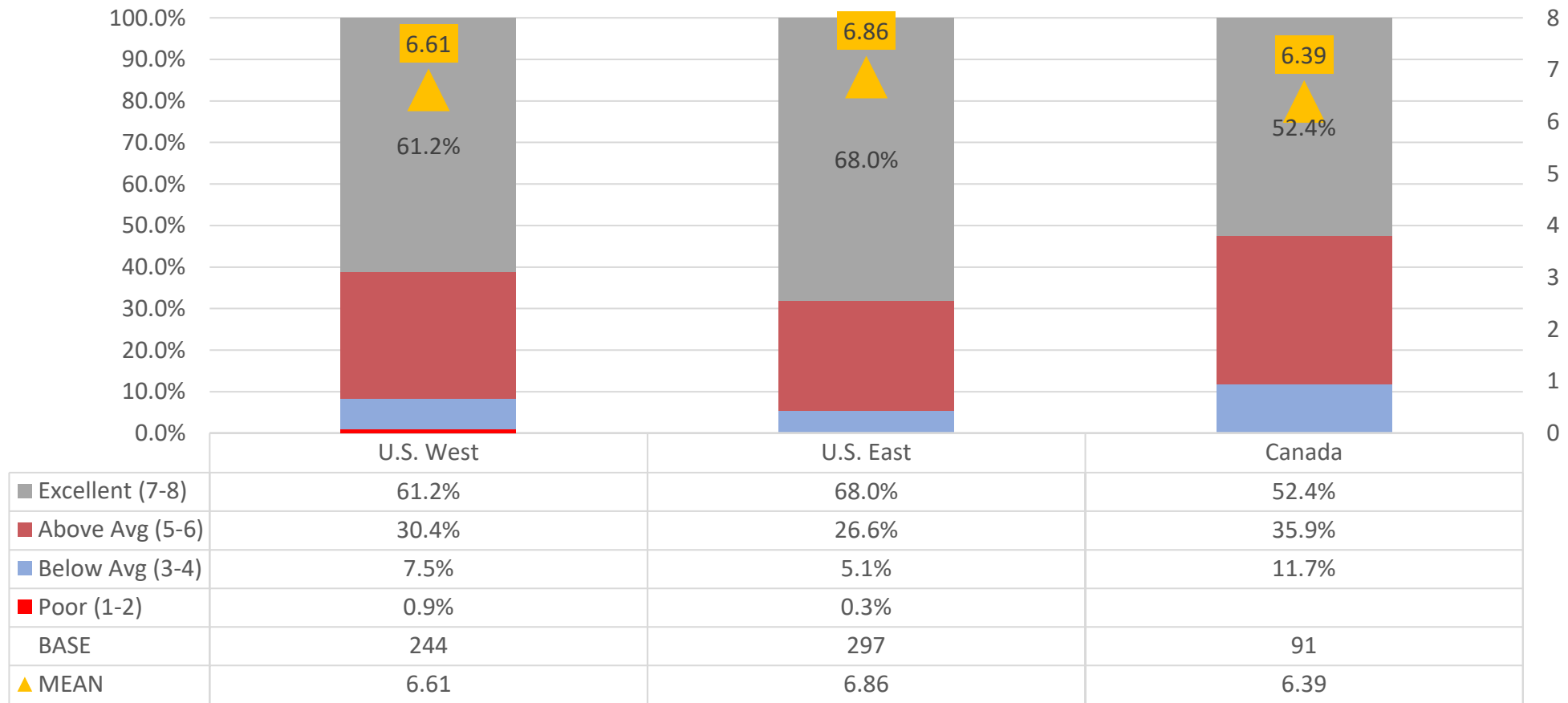
SHOPPING - KAUA'I

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



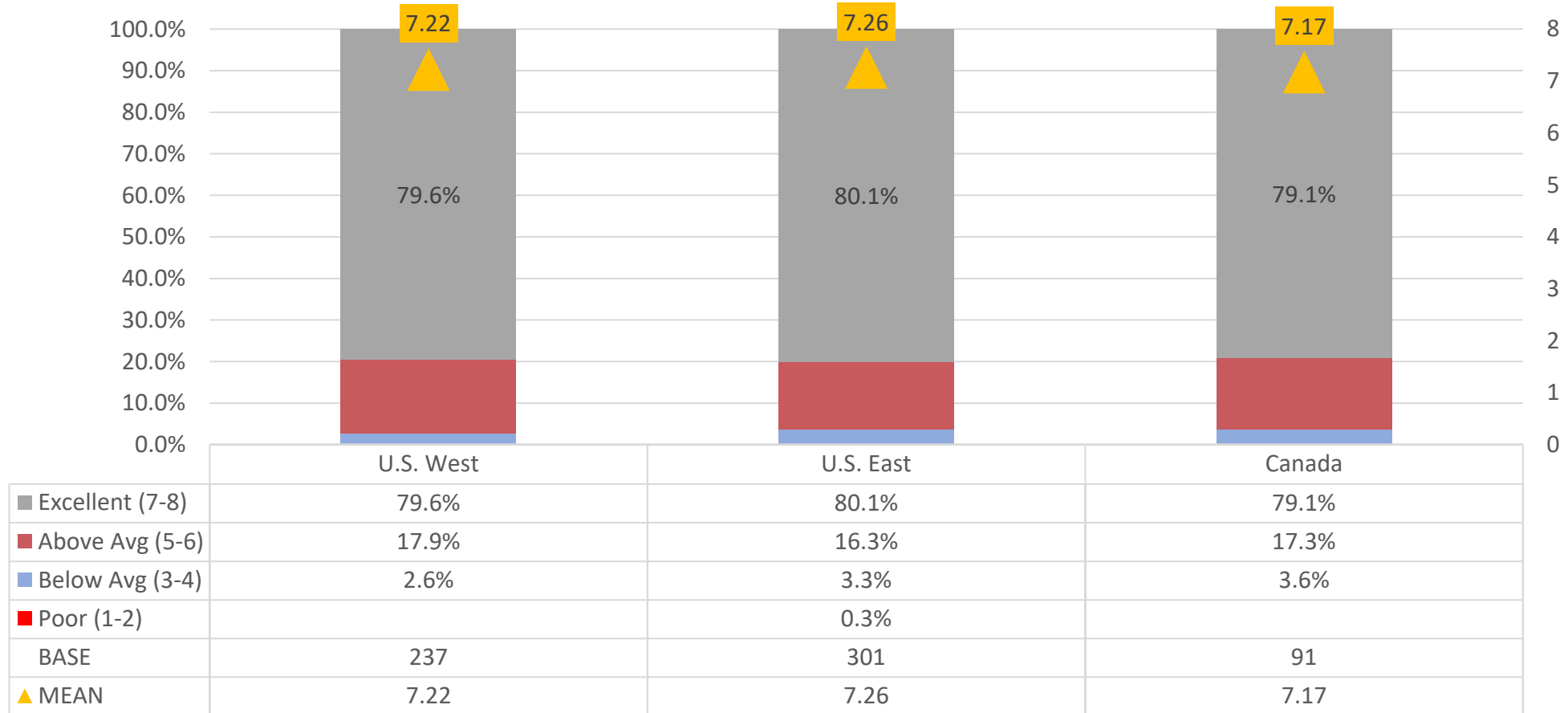
DINING/ FOOD & BEVERAGE - KAUA'I

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



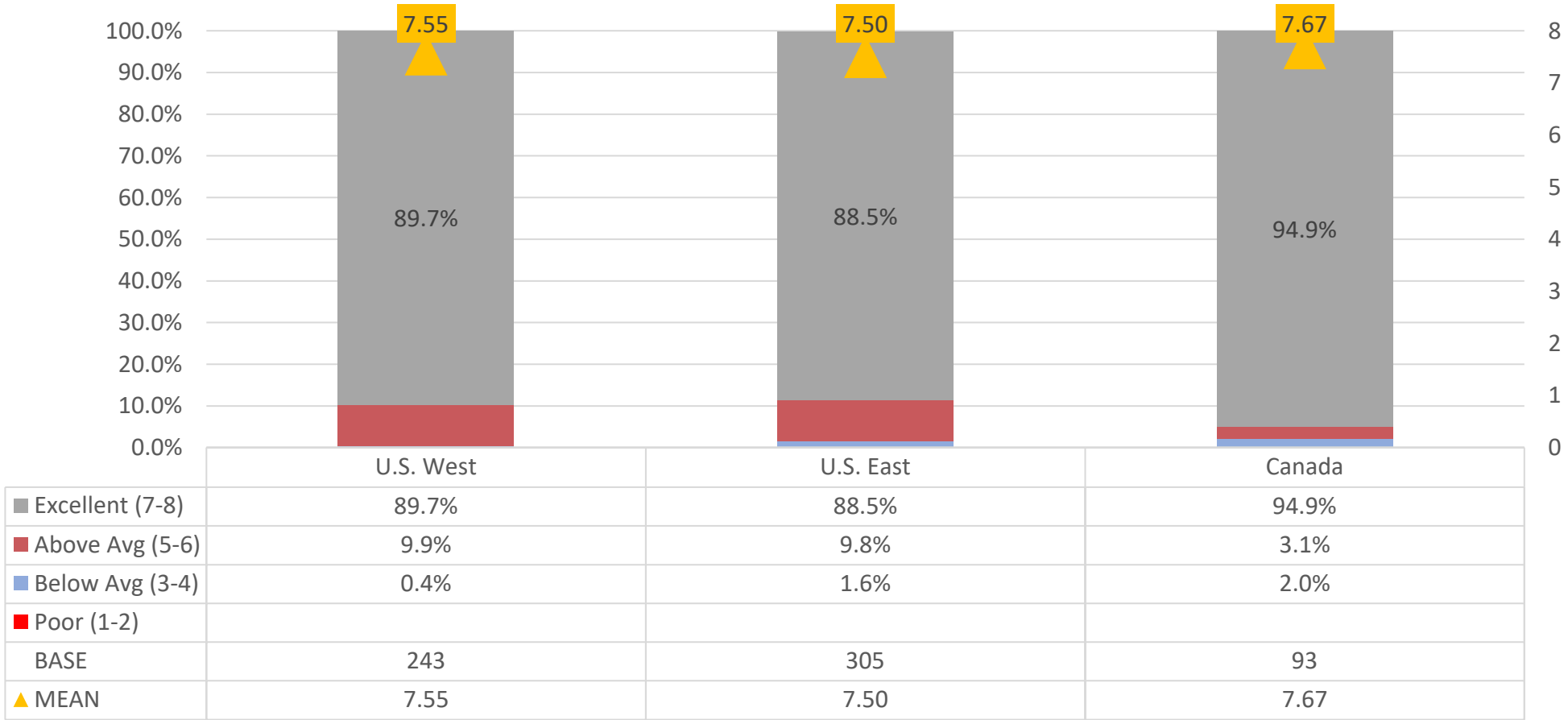
LODGING/ ACCOMMODATIONS - KAUA'I

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



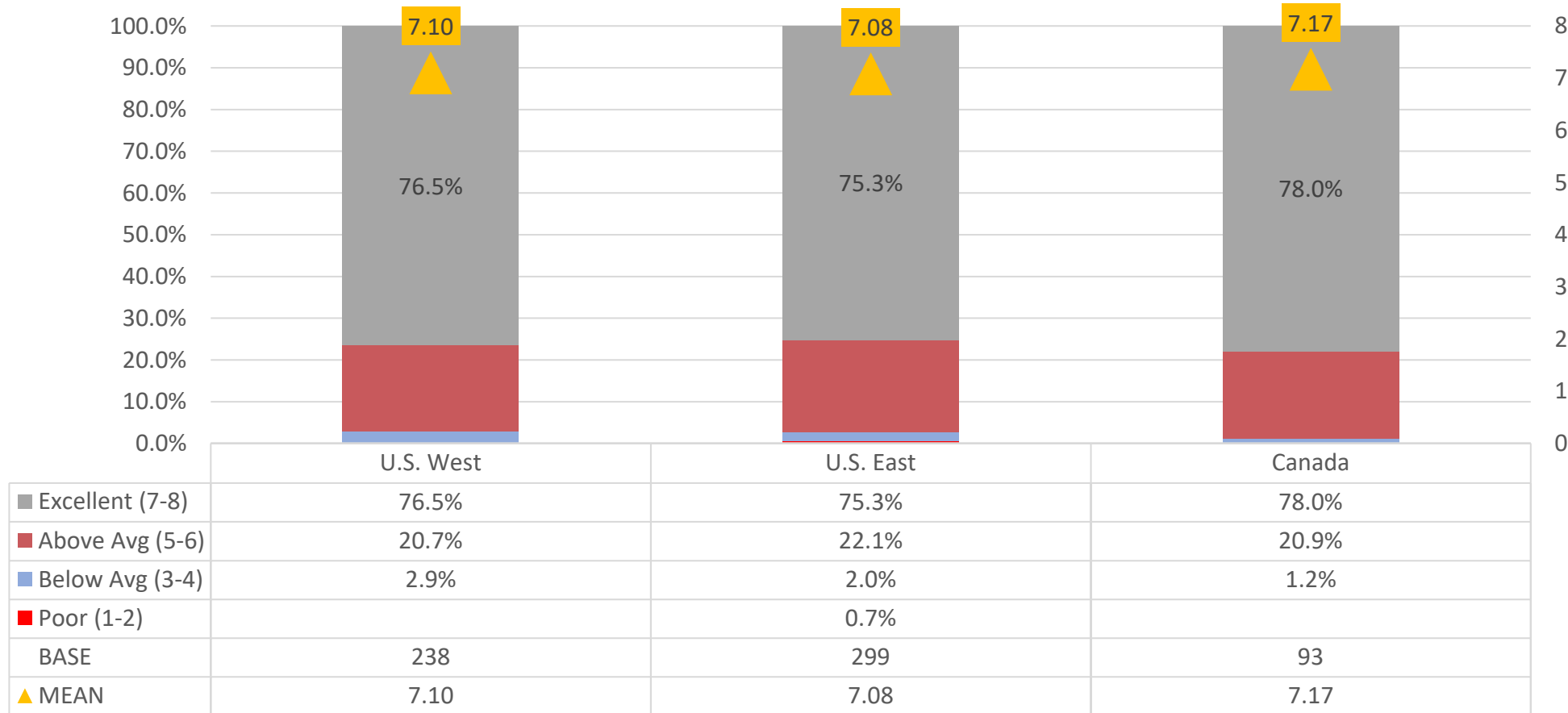
BEACHES - KAUA'I

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



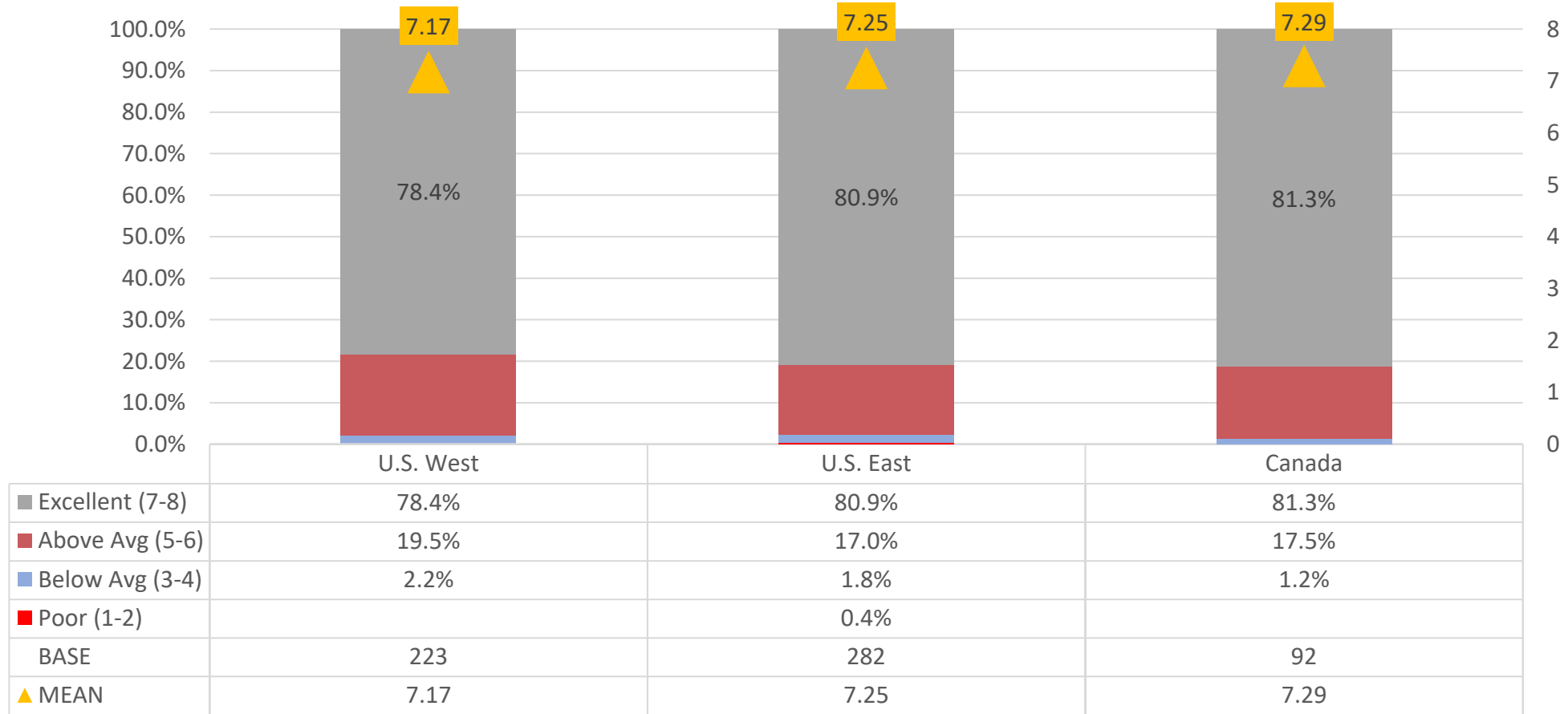
PUBLIC AREAS - KAUAI'I

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



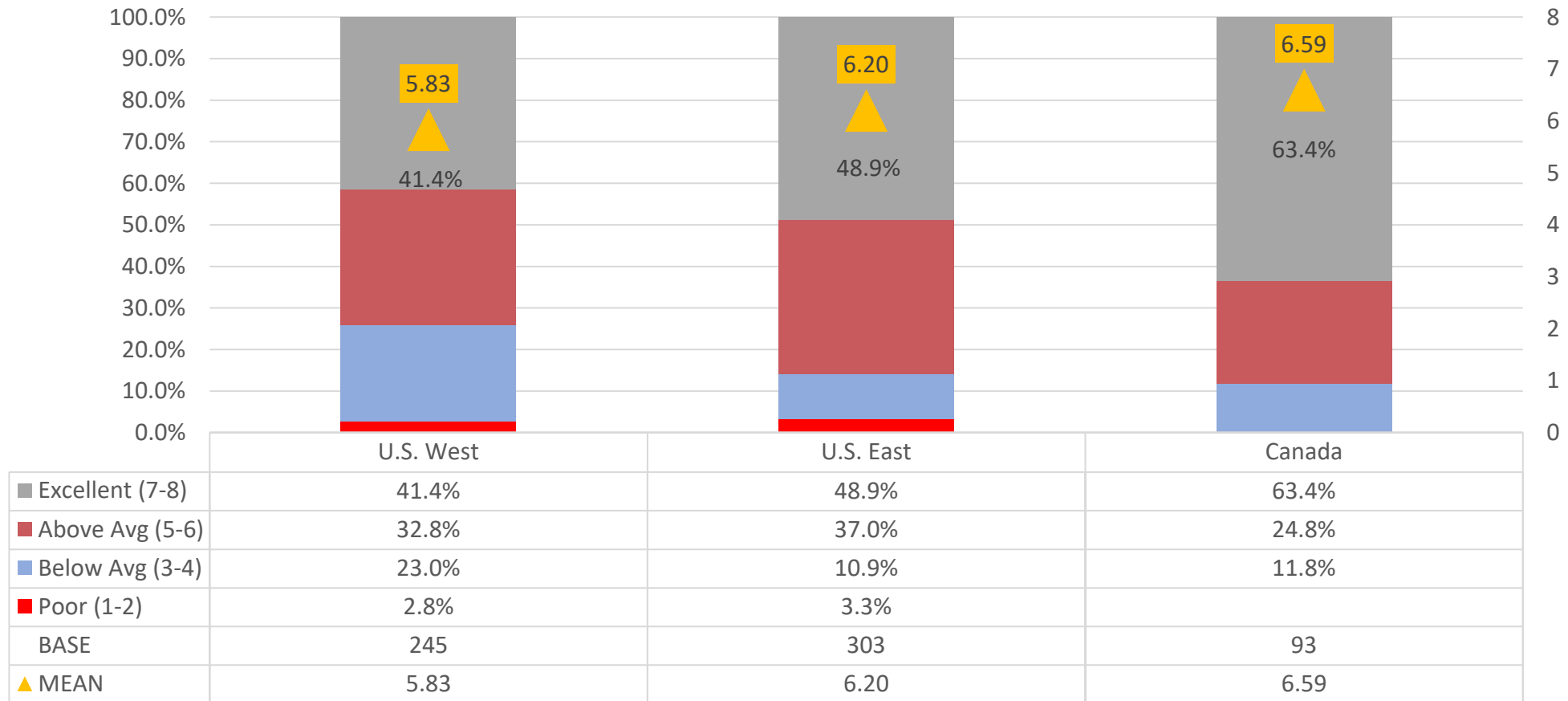
PARKS - KAUA'I

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



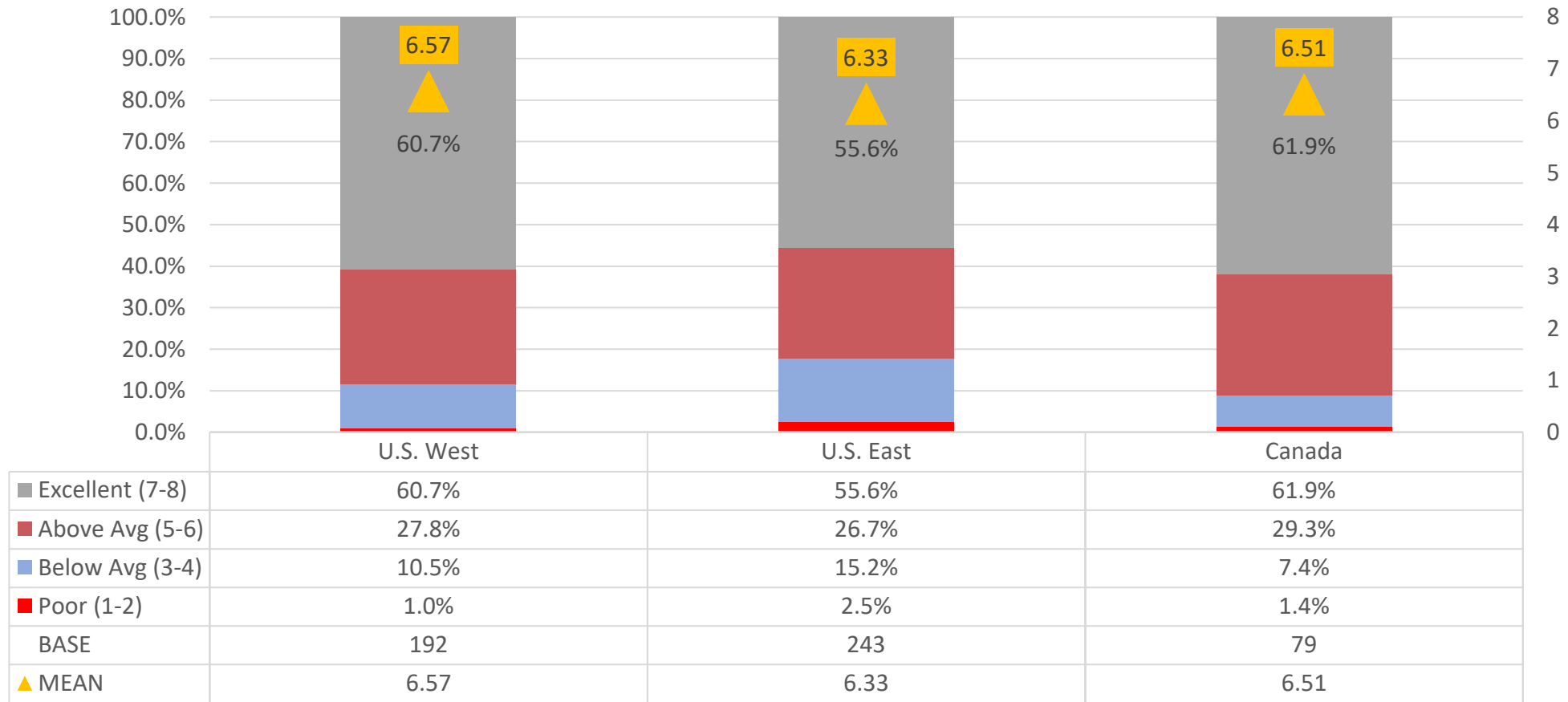
ROADS - KAUA'I

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



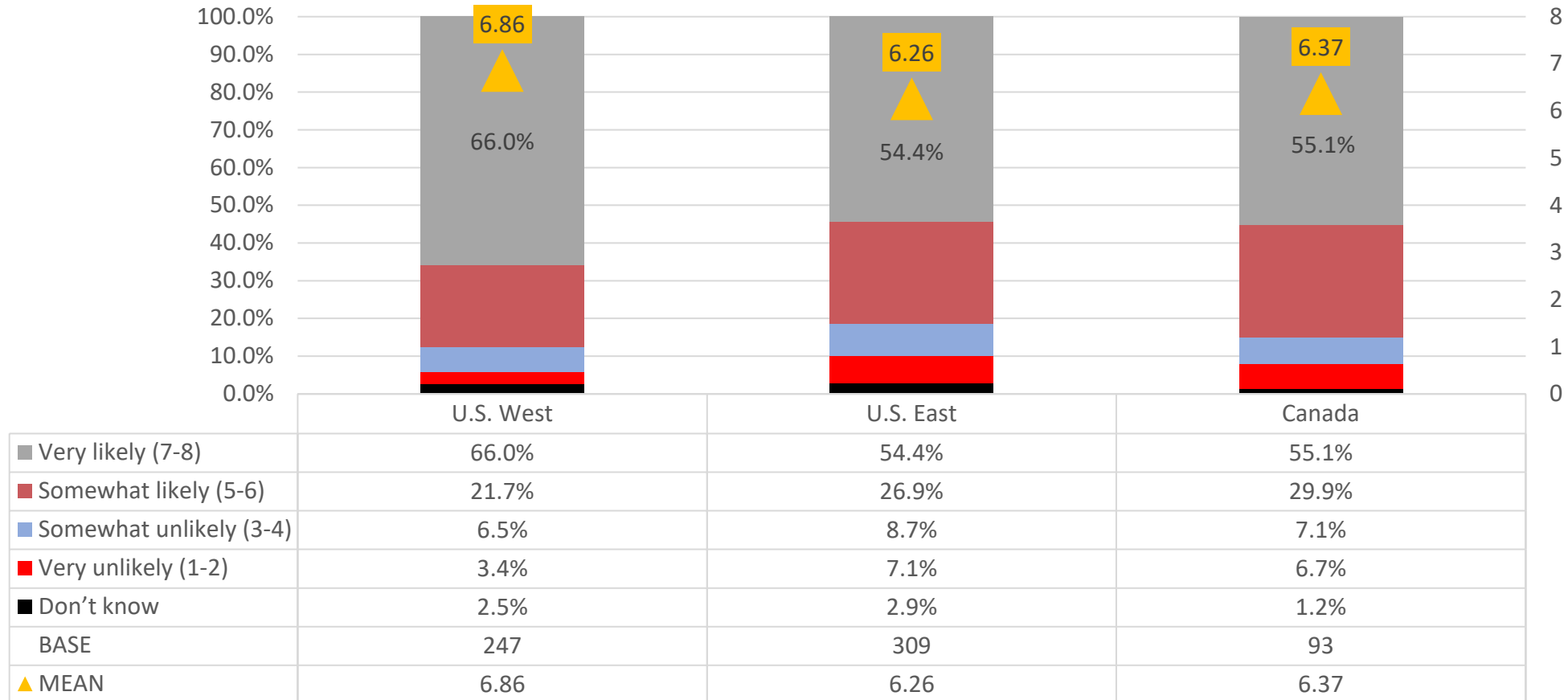
TRANSPORTATION ON ISLAND - KAUA'I

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



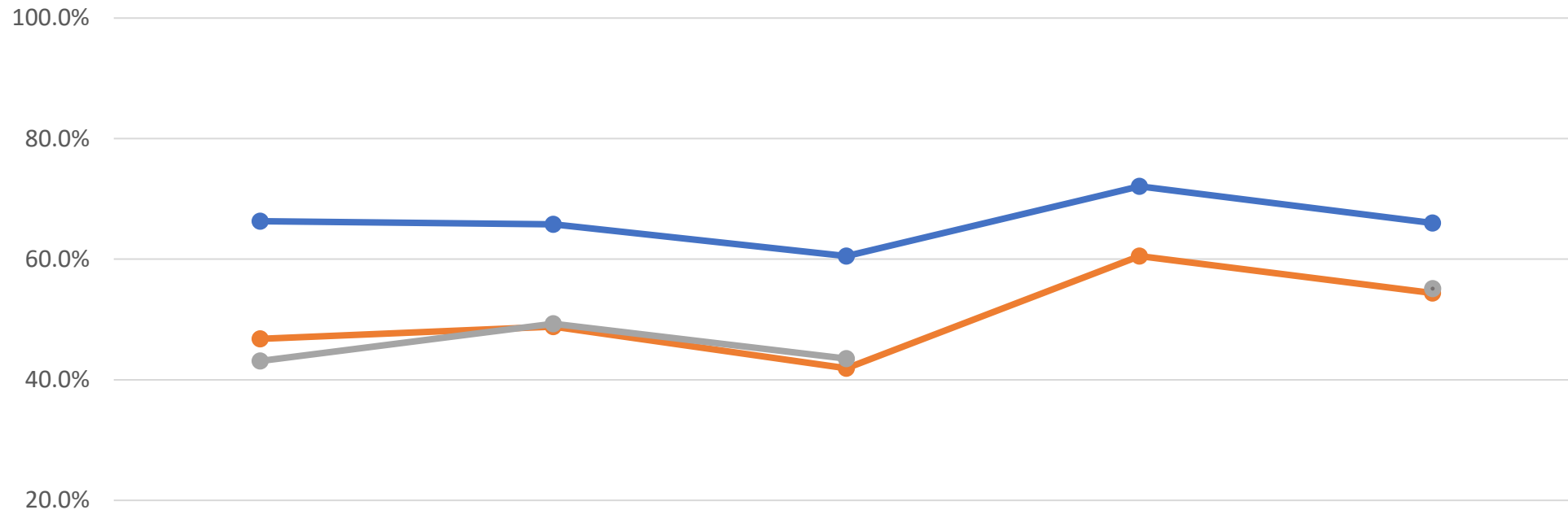
LIKELIHOOD OF RETURN VISIT - KAUA'I

8-pt Rating Scale
8=Very likely/ 1=Very unlikely



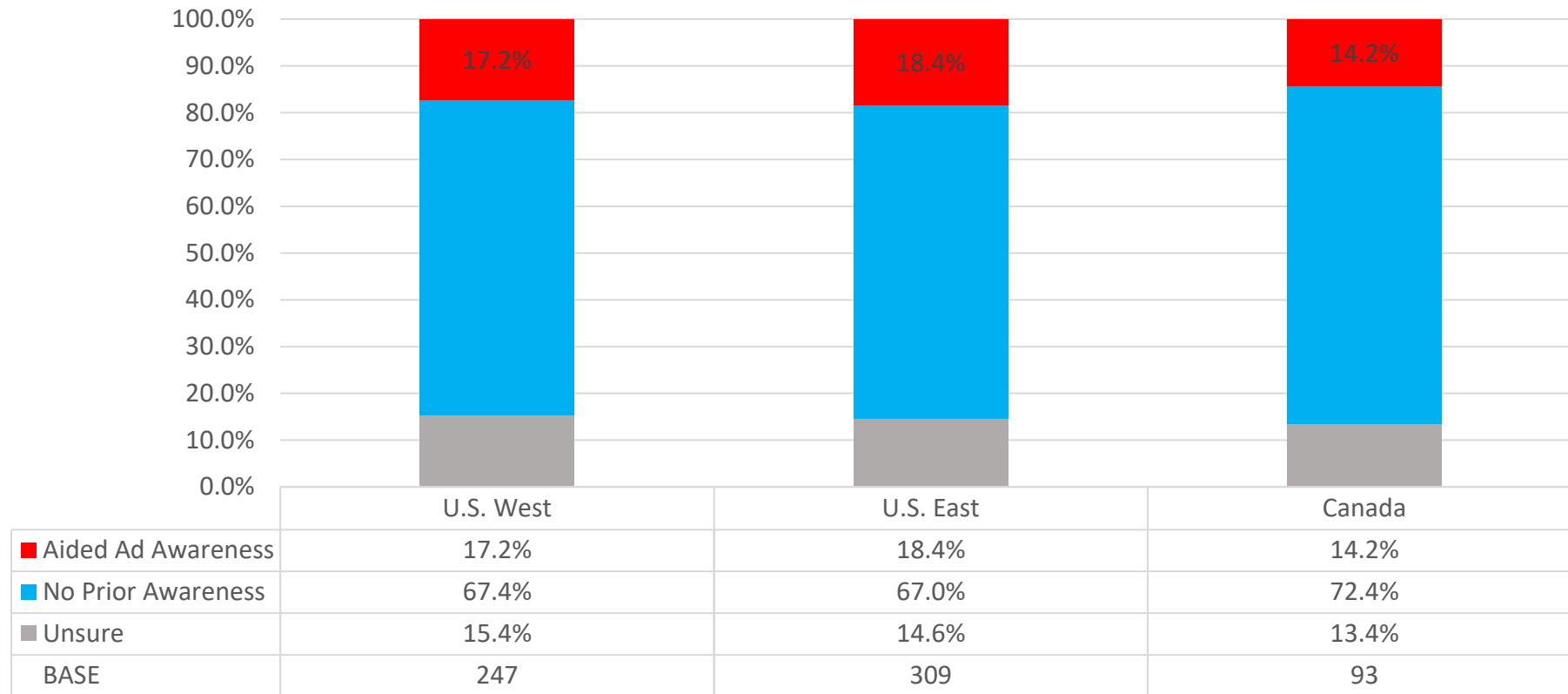
LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	66.3%	65.8%	60.5%	72.1%	66.0%
U.S. East	46.8%	48.8%	41.9%	60.5%	54.4%
Canada	43.1%	49.3%	43.5%		55.1%

AIDED ADVERTISING AWARENESS - KAUA'I



MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	42.0%	47.9%	48.0%
Outdoor or sporting activities/ events	17.2%	19.1%	17.3%
Hawaiian cultural events	5.8%	7.4%	4.7%
Social media posts/ videos	4.4%	6.8%	4.3%
Hawaiian music	3.9%	4.2%	3.5%
Television programs or movies filmed in Hawai'i	4.6%	7.1%	5.9%
BASE	247	309	93

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Canada
Fern Grotto	6.7%	7.8%	11.0%
Hanalei Town	54.6%	49.5%	68.9%
Hanalei Beach	55.7%	53.4%	69.3%
Kalalau Trail	22.5%	25.2%	29.1%
Kalapaki Beach	11.4%	19.4%	17.7%
Bike Path in Kapaa	11.6%	11.3%	16.5%
Kaua'i Museum	2.9%	3.6%	4.3%
Ke'e Beach	10.2%	11.7%	10.6%
Kilauea Lighthouse	30.5%	33.0%	29.5%
Koke'e	11.2%	11.0%	13.8%

ATTRACTIONS- KAUA'I

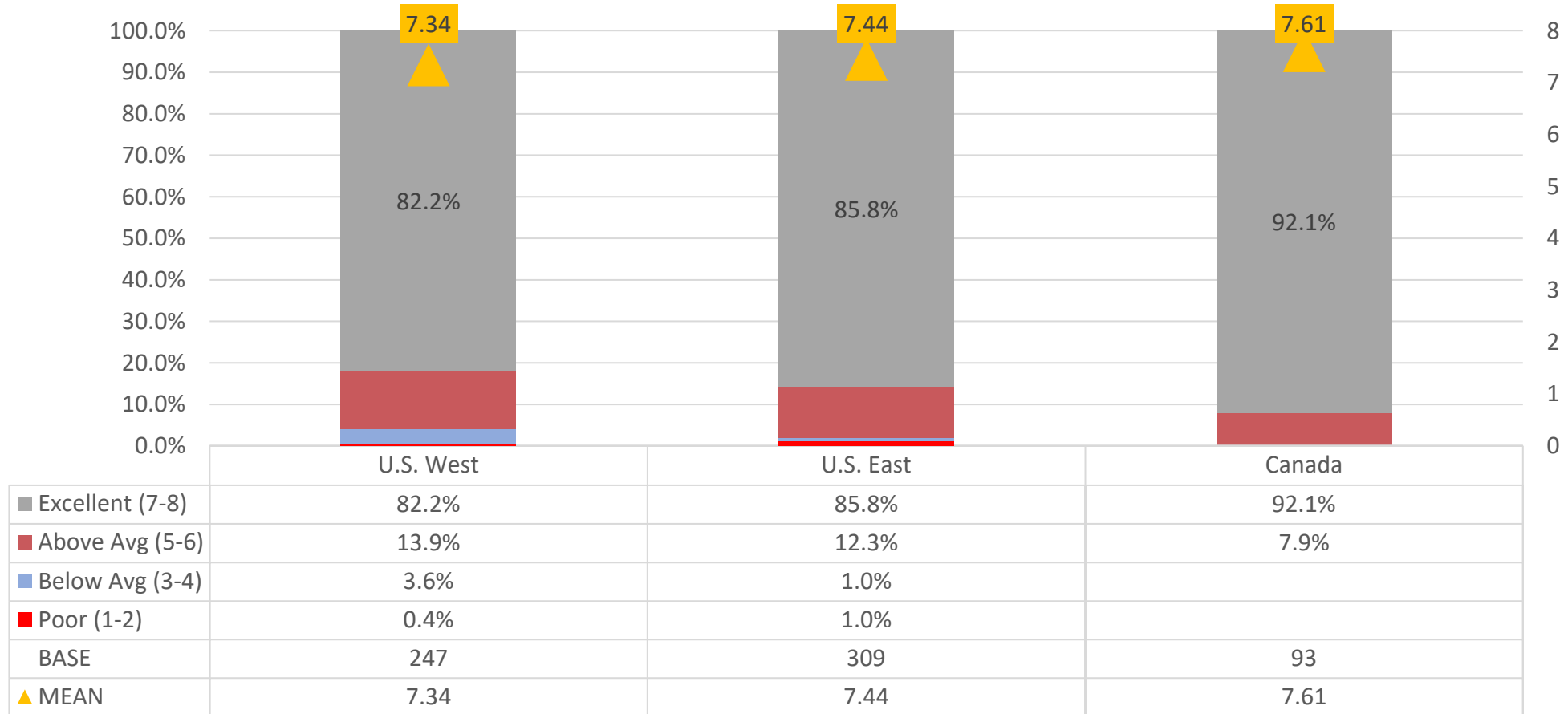
	U.S. West	U.S. East	Canada
Koke'e Museum	2.1%	3.6%	6.3%
Na Aina Kai Gardens	2.0%	1.9%	3.9%
Napali Coast	40.5%	53.1%	48.0%
Allerton Garden	15.1%	9.1%	11.8%
Limahuli Garden	8.4%	3.9%	6.7%
Old Koloa Town	44.3%	30.4%	56.3%
Opaeka'a Falls	14.8%	22.3%	24.4%
Po'ipu Beach	78.0%	64.7%	78.4%
Smith's Tropical Paradise Gardens	4.1%	8.7%	5.5%
Spouting Horn	38.1%	31.1%	40.2%
Wailua Falls	31.4%	36.2%	46.1%

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Canada
Wailua River	18.0%	22.0%	29.9%
Waimea Canyon	51.9%	56.6%	67.7%
Disc Golf	1.3%	0.6%	1.2%
Mini Golf	3.7%	1.3%	4.3%

FRIENDLINESS OF KAUA'I RESIDENTS

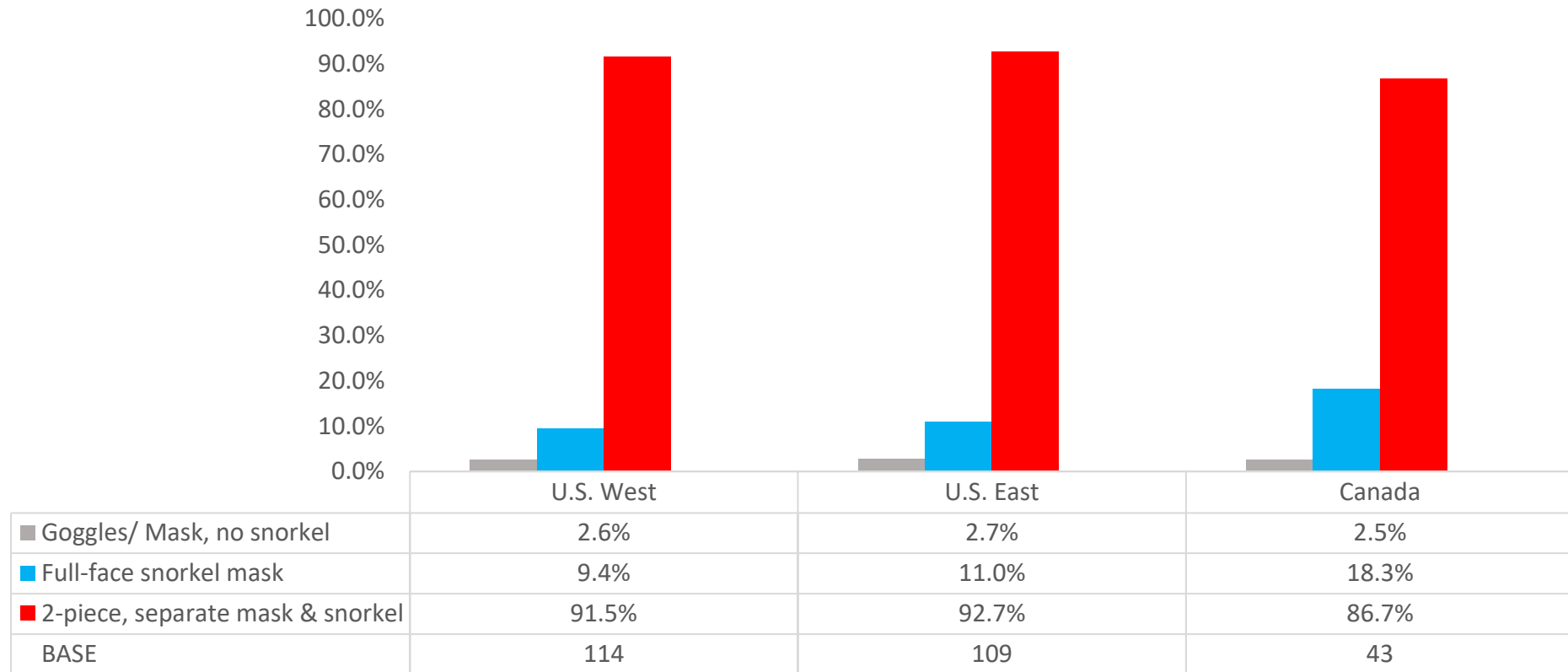
8-pt Rating Scale
8=Excellent/ 1=Poor



TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Canada
Been here before	50.9%	41.1%	42.6%
Friend recommendation	27.2%	28.2%	33.5%
Visiting Family/ Friends	4.9%	4.2%	3.1%
Article/ Blog	2.7%	4.5%	3.5%
Attending Conference/ Event	1.7%	4.9%	3.9%
Own a timeshare	2.4%	1.3%	2.0%
Social Media Post	1.7%	1.9%	0.0%
Location/ Never been, but went to other islands	1.6%	1.3%	3.5%
Nature/ Beauty/ Scenery	1.2%	1.6%	3.1%

SNORKELING EQUIPMENT USED - KAUA'I



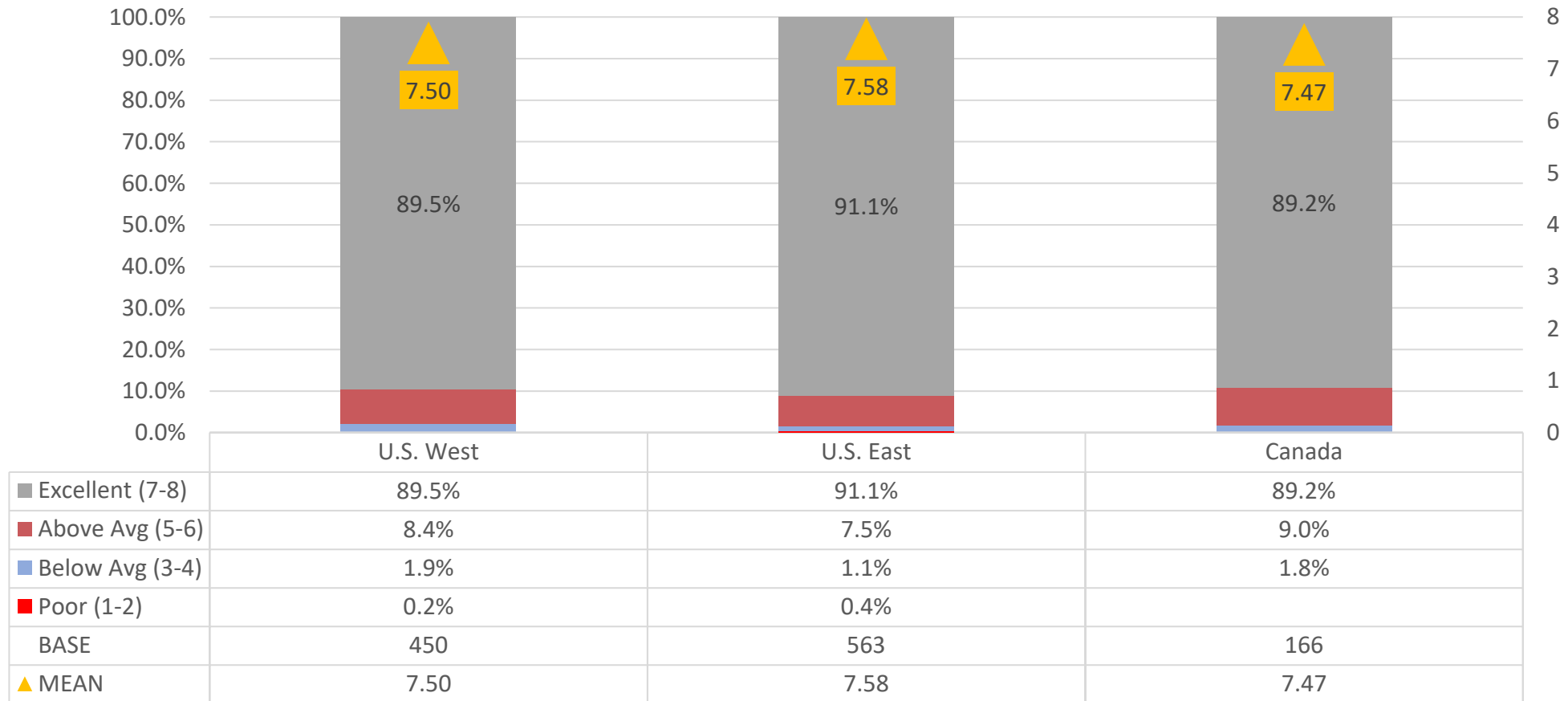
SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	91.5%	92.7%	86.7%
Yes, needed assistance using 2 piece mask & snorkel	9.4%	11.0%	18.3%
Yes, while doing another type of ocean activity	2.6%	2.7%	2.5%
BASE	209	224	66

Section 7 – MAUI

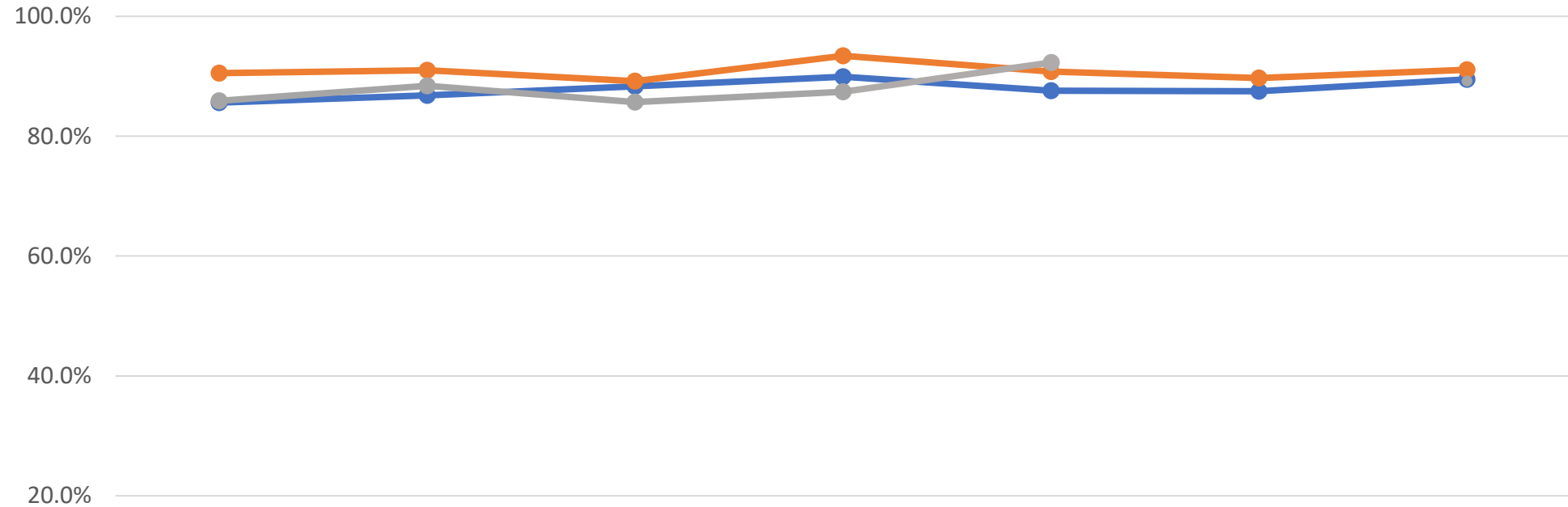
SATISFACTION - MAUI

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



SATISFACTION - MAUI

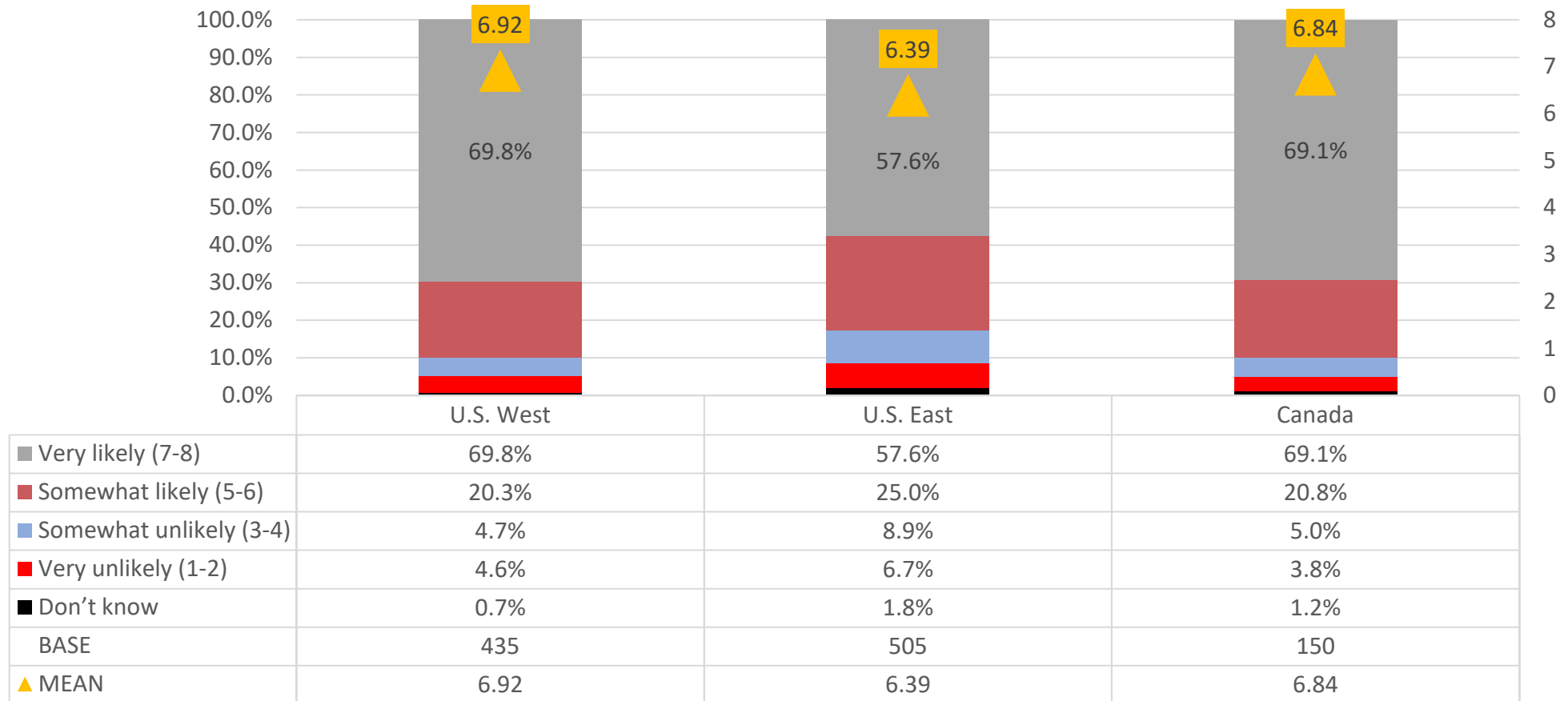
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	85.6%	86.8%	88.3%	89.9%	87.6%	87.5%	89.5%
U.S. East	90.5%	91.0%	89.2%	93.4%	90.8%	89.7%	91.1%
Canada	85.9%	88.4%	85.7%	87.4%	92.3%		89.2%

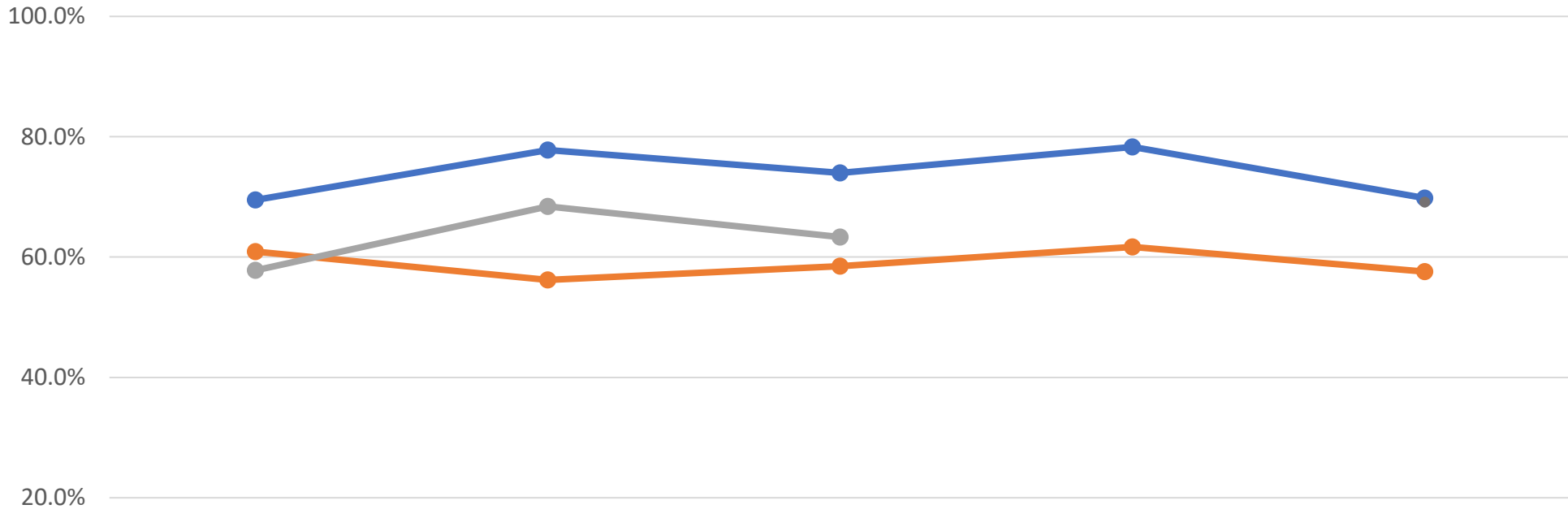
LIKELIHOOD OF RETURN VISIT - MAUI

8-pt Rating Scale
8=Very likely/ 1=Very unlikely



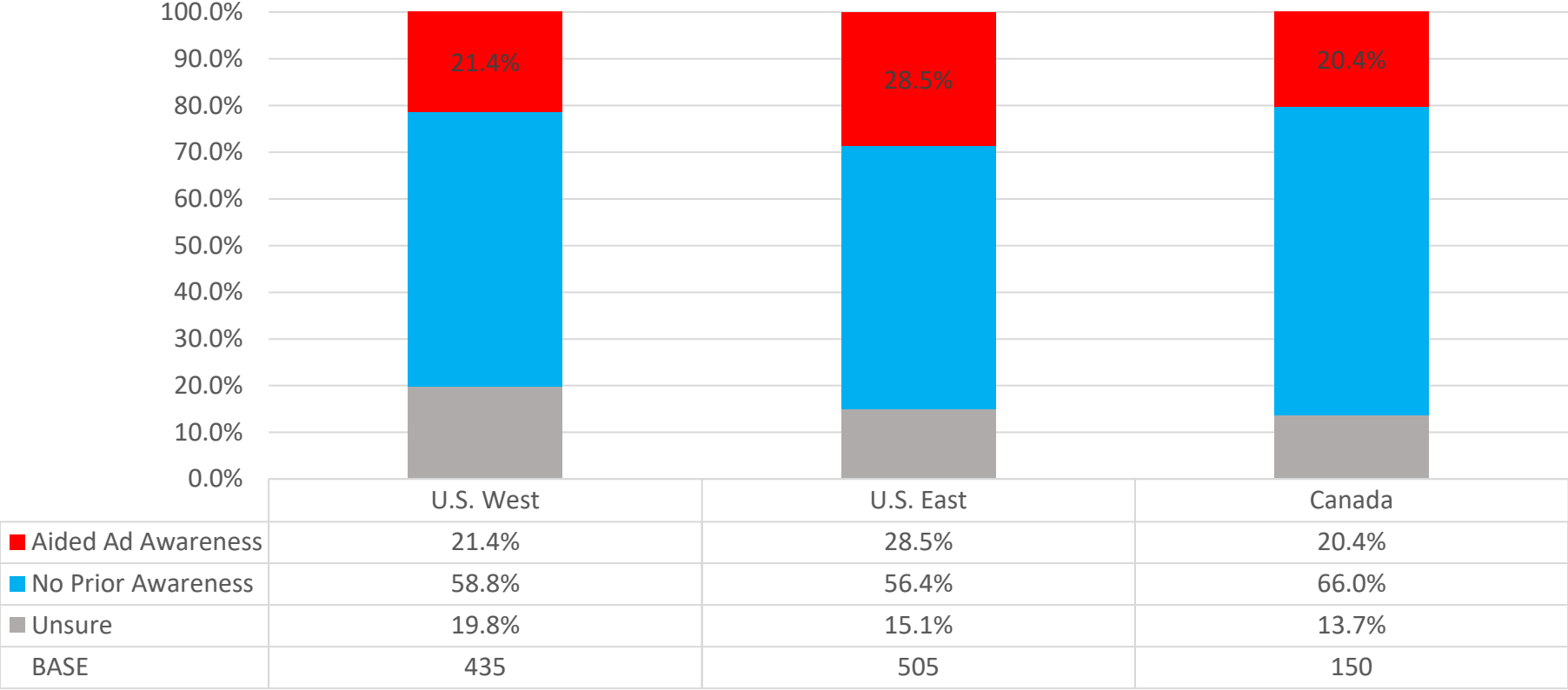
LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	69.5%	77.8%	74.0%	78.3%	69.8%
U.S. East	60.9%	56.2%	58.5%	61.7%	57.6%
Canada	57.8%	68.4%	63.3%		69.1%

AIDED ADVERTISING AWARENESS - MAUI



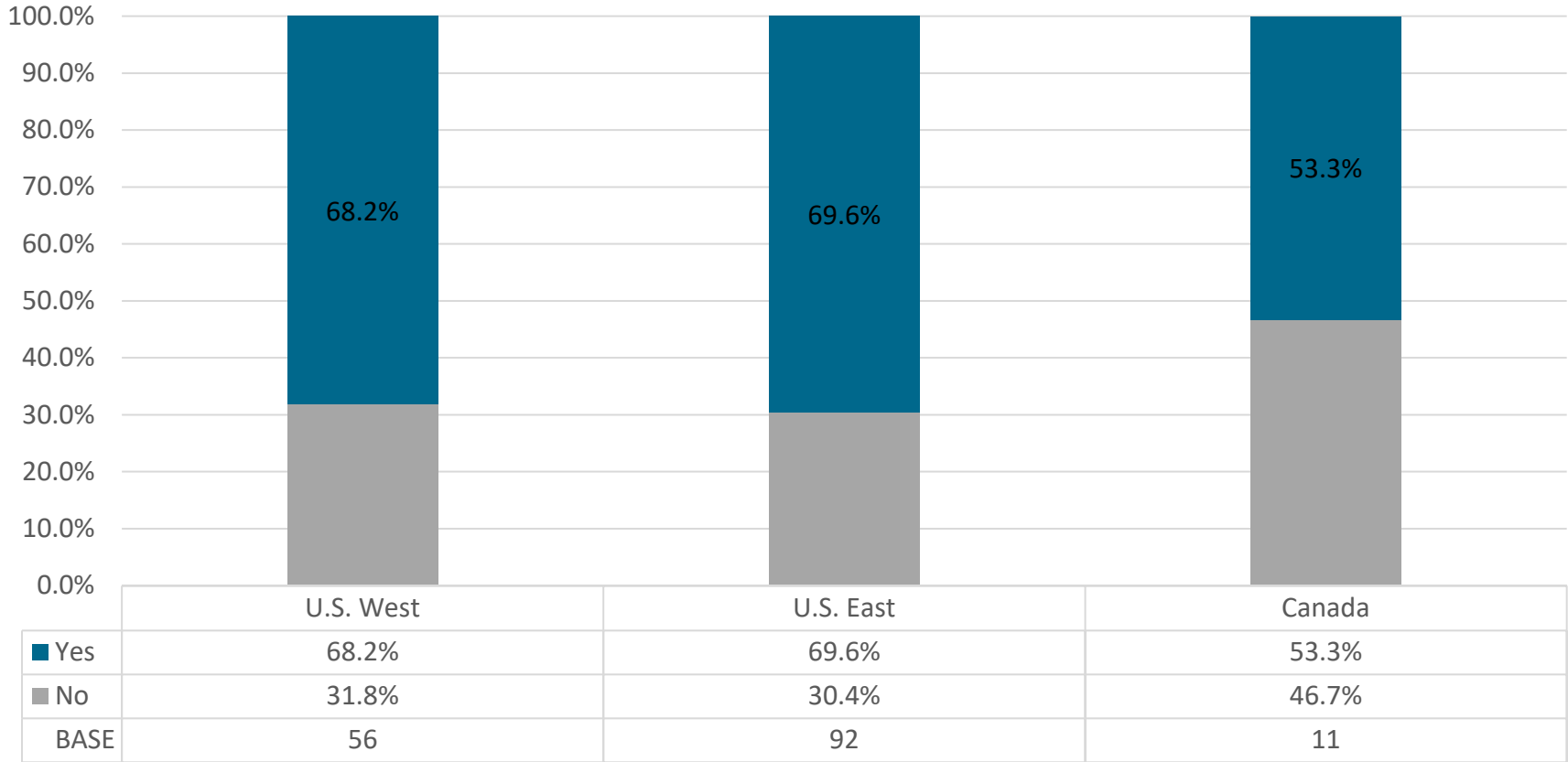
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	31.3%	43.4%	31.4%
Outdoor or sporting activities/ events	18.8%	17.6%	14.4%
Hawaiian cultural events	8.1%	11.5%	6.2%
Social media posts/ videos	7.3%	11.7%	9.8%
Hawaiian music	6.5%	5.5%	7.9%
Television programs or movies filmed in Hawai'i	3.1%	5.7%	10.6%
BASE	435	505	150

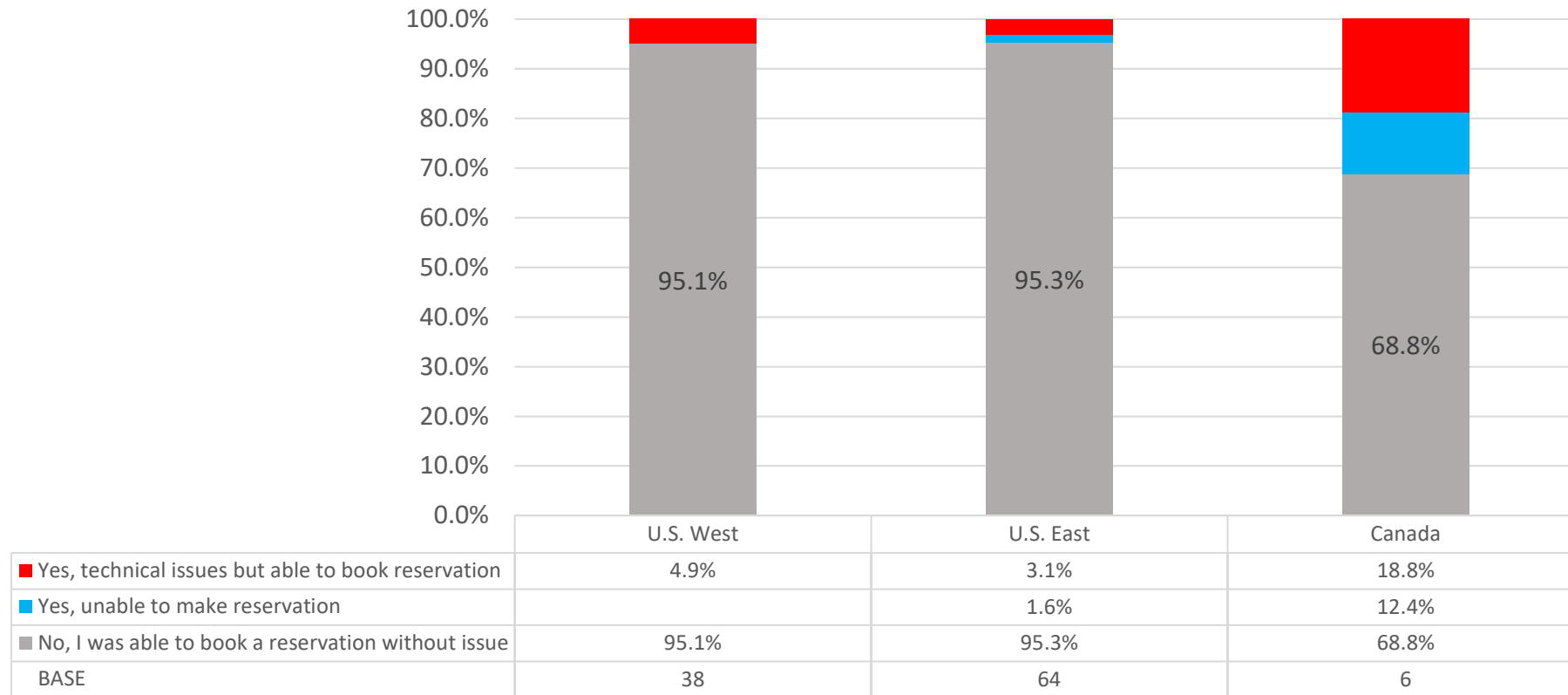
ATTRACTIONS- MAUI

	U.S. West	U.S. East	Canada
Alexander & Baldwin Sugar Museum	1.6%	1.8%	2.6%
Aquarium Maui /Maui Ocean Center	15.0%	14.5%	15.3%
Baldwin Missionary Home Museum	4.9%	4.8%	7.4%
Hale Pa'i Printing House	0.0%	0.4%	0.7%
Haleakala National Park	31.3%	46.2%	23.7%
Haleki'i Pihana Heiau State Monument	1.2%	1.2%	2.2%
Hana Cultural Center	5.5%	10.3%	9.1%
'Iao Valley State Monument	13.4%	14.7%	13.2%
Kepaniwai Park & Heritage Gardens	4.1%	5.2%	3.6%
Kula Botanical Garden	6.3%	7.5%	2.9%
Maui Historical Society Bailey House Museum	1.8%	2.0%	3.6%
Wainapanapa State Park	13.2%	18.3%	7.2%
Whaler's Village Museum	13.9%	12.5%	15.6%
Wo Hing Temple Museum	0.4%	0.6%	0.0%

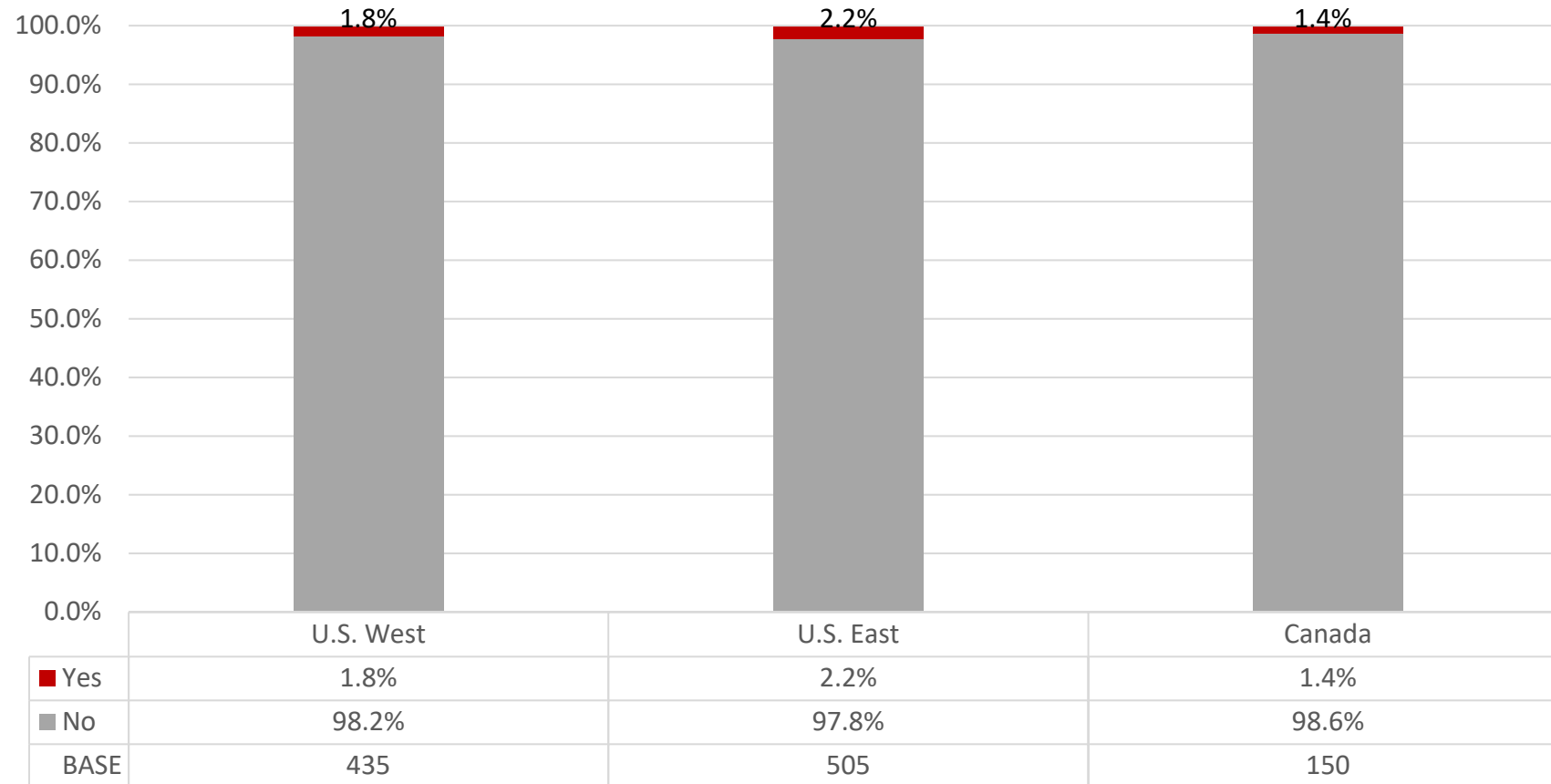
WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



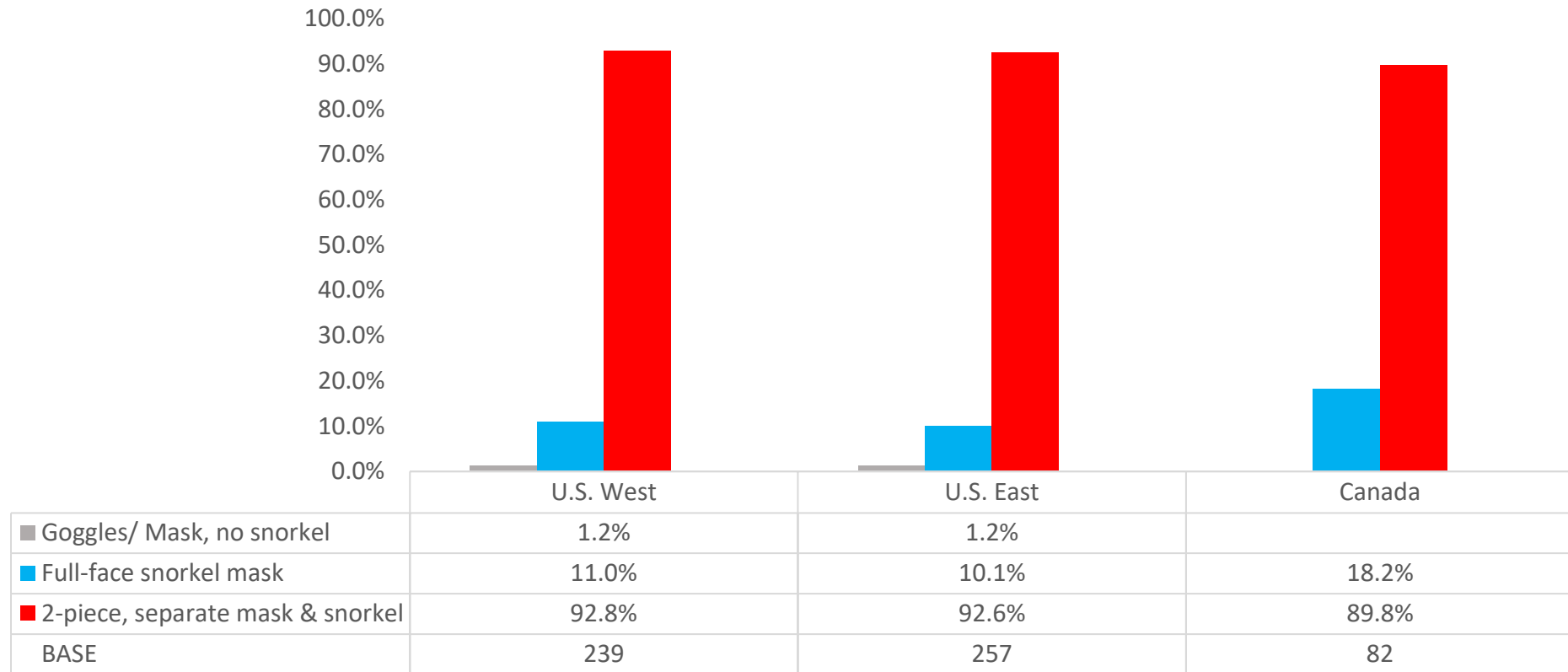
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Canada
Sentry Tournament of Golf Champions	37.5%	36.3%	-
Maui Marathon	12.5%	27.3%	50.0%
Wedding/ honeymoon/ anniversary/ birthday/ funeral/ graduation	-	27.3%	-
Convention/ conference/ retreat/ seminar/ workshop	12.5%	9.1%	-
Other festival/ concert	12.5%	-	-
Whale watching	12.5%	-	-
Maui Film Festival	12.5%	-	-
Other sporting event	-	-	50.0%
BASE	8	11	2

SNORKELING EQUIPMENT USED - MAUI



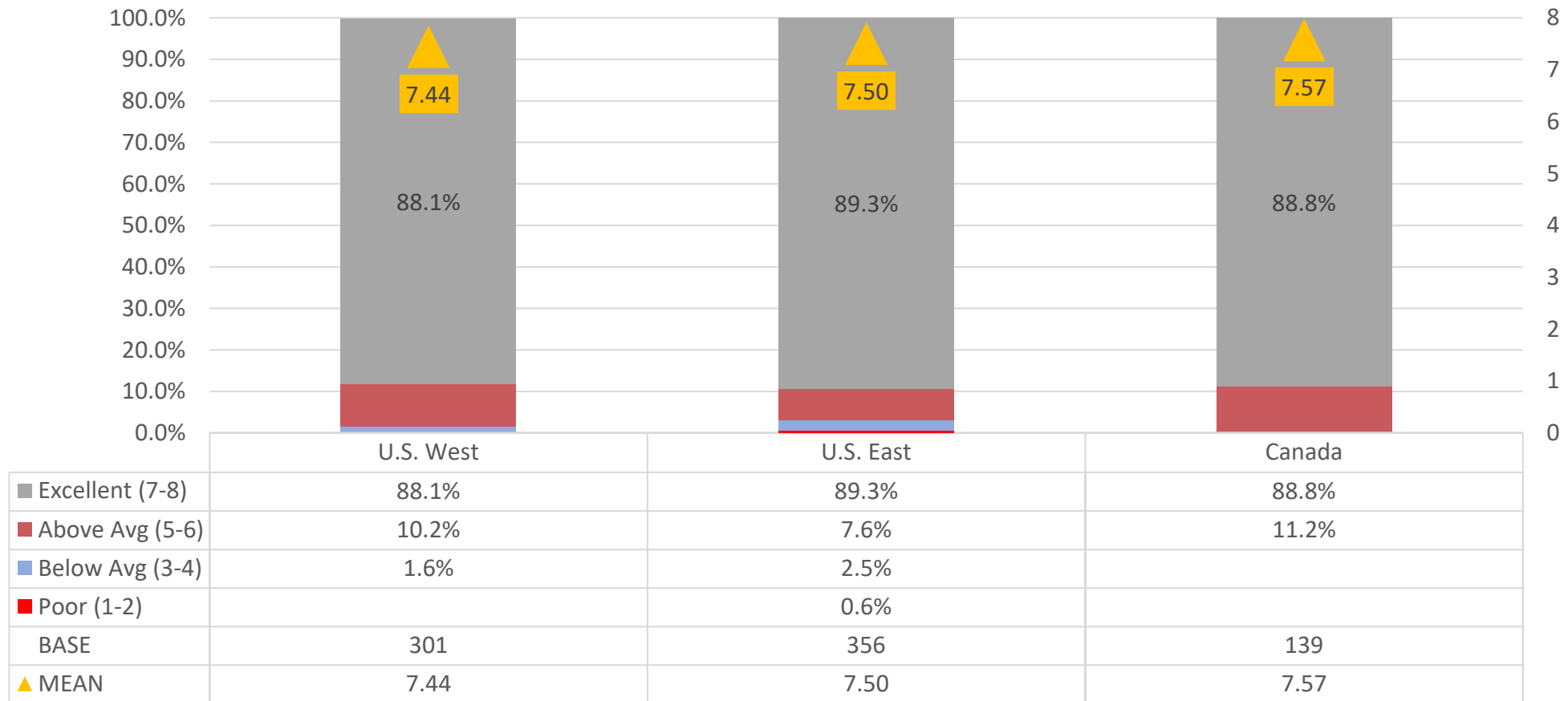
SNORKELING OCEAN SAFETY- MAUI

	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	99.6%	98.4%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	0.4%	1.6%	-
Yes, while doing another type of ocean activity	-	-	-
BASE	236	254	82

Section 8 – ISLAND OF HAWAII

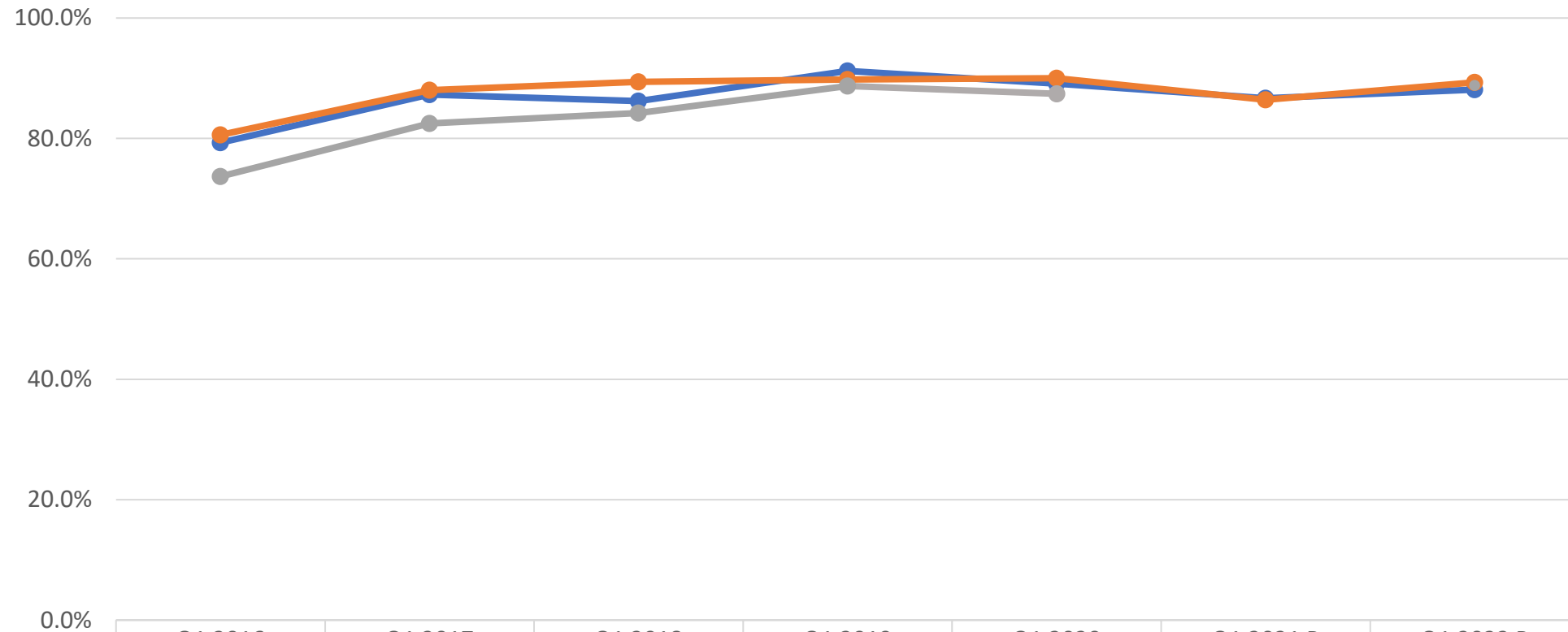
SATISFACTION - ISLAND OF HAWAI'I

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



SATISFACTION - ISLAND OF HAWAI'I

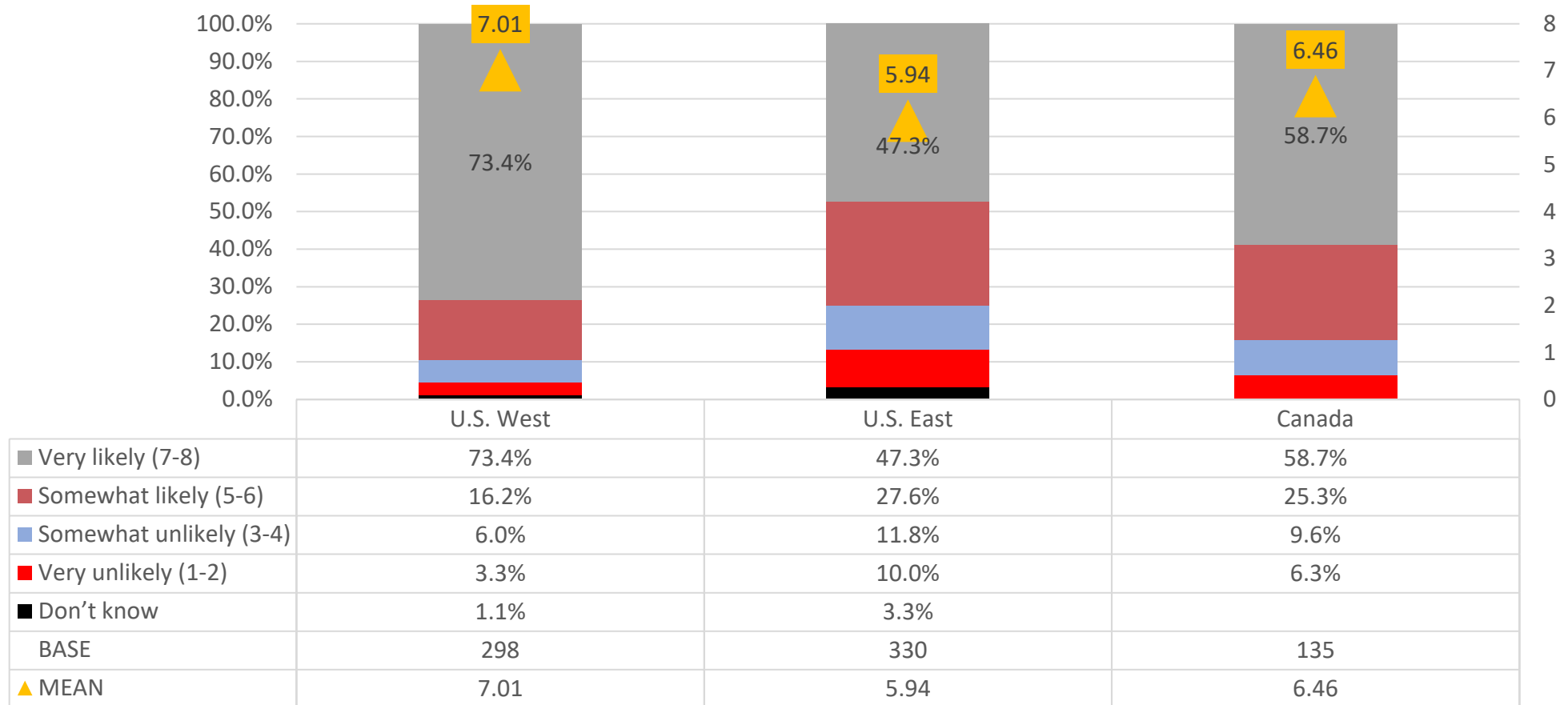
Tracking Data – Rating of “Excellent” (7-8)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	79.3%	87.3%	86.2%	91.2%	89.1%	86.7%	88.1%
U.S. East	80.6%	88.0%	89.4%	89.8%	90.0%	86.4%	89.3%
Canada	73.7%	82.5%	84.2%	88.7%	87.4%		88.8%

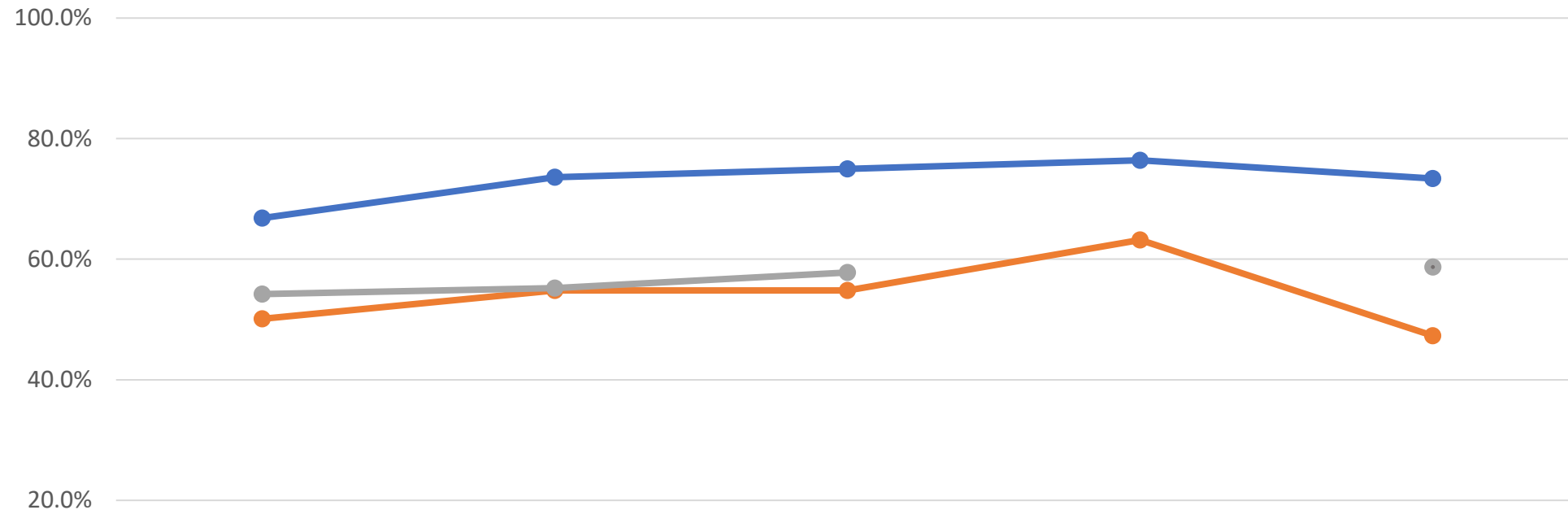
LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

8-pt Rating Scale
8=Very likely/ 1=Very unlikely



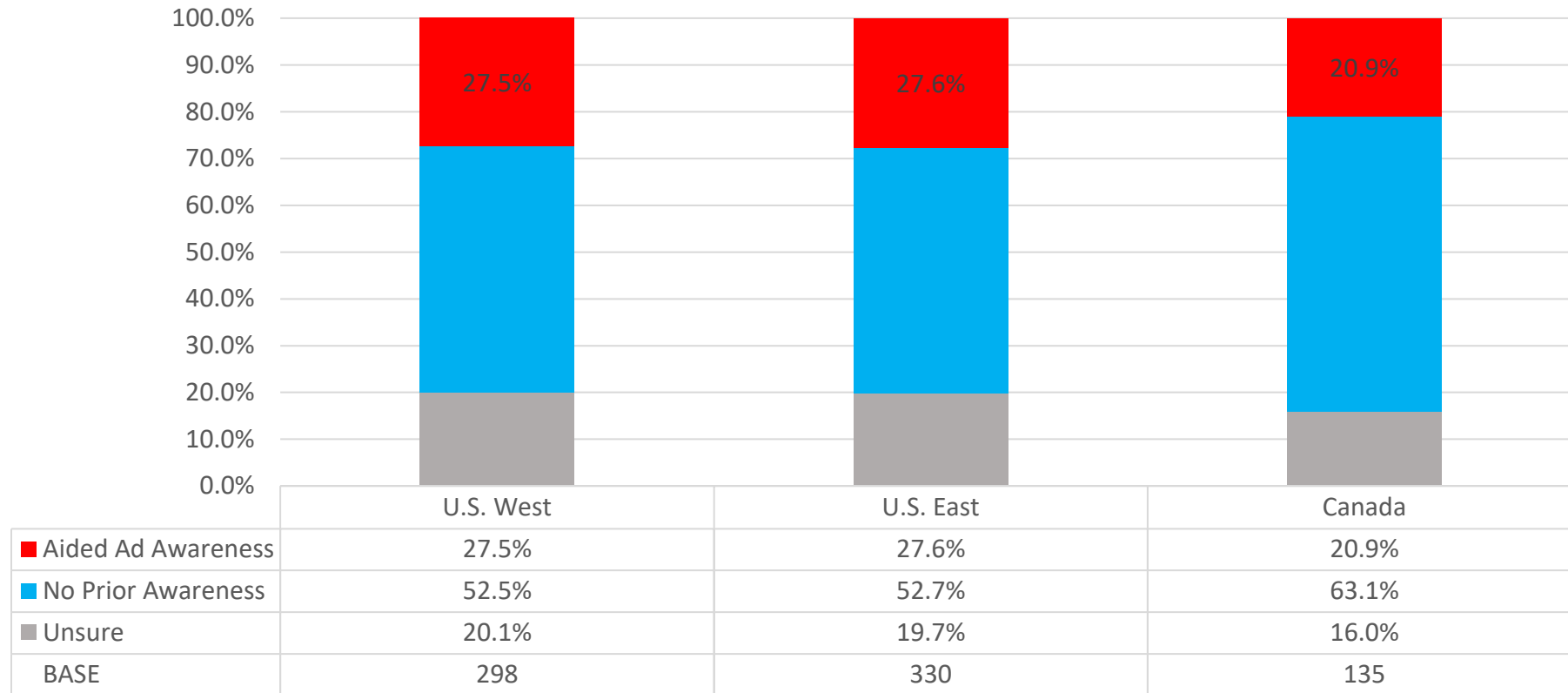
LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021 P	Q1 2022 P
U.S. West	66.8%	73.6%	75.0%	76.4%	73.4%
U.S. East	50.1%	54.8%	54.8%	63.2%	47.3%
Canada	54.2%	55.2%	57.8%		58.7%

AIDED ADVERTISING AWARENESS ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	39.1%	55.2%	46.0%
Outdoor or sporting activities/ events	19.9%	19.1%	20.7%
Hawaiian cultural events	8.7%	13.0%	5.2%
Social media posts/ videos	9.7%	7.6%	7.4%
Hawaiian music	7.6%	5.2%	3.0%
Television programs or movies filmed in Hawai'i	5.8%	7.3%	10.2%
BASE	298	330	135

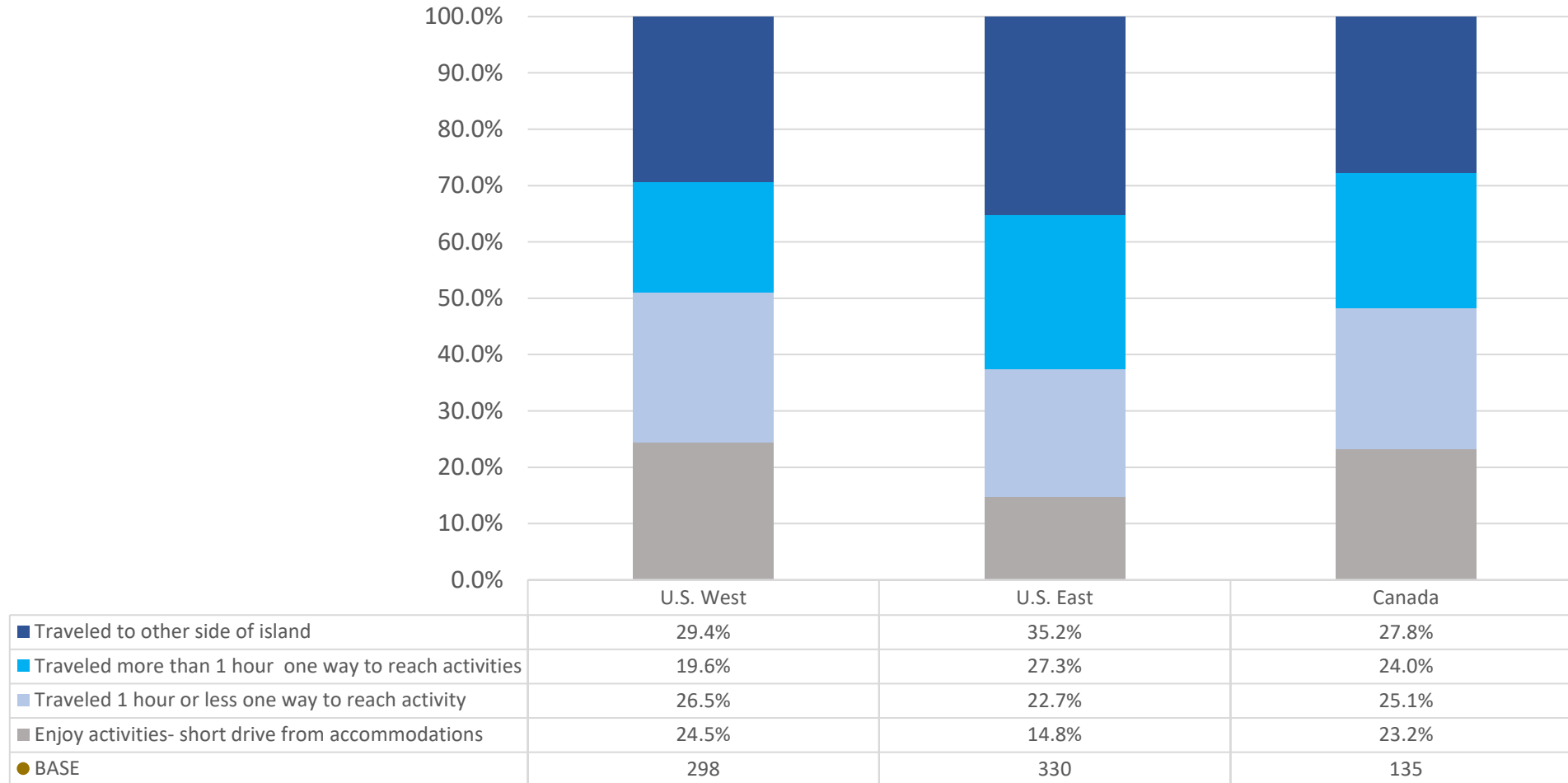
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
'Akaka Falls	29.1%	41.8%	30.6%
Botanical Gardens	22.4%	24.6%	19.3%
H.N. Greenwell Store	1.4%	4.5%	5.8%
Hawai'i Volcanoes National Park	53.9%	71.2%	63.3%
Hilo Farmers Market	26.8%	23.6%	28.9%
Hulihe'e Palace	4.7%	0.9%	4.1%
'Imiloa Astronomy Ctr	1.6%	0.9%	0.8%
Kaloko Honokohau National Historical Park	6.7%	10.0%	8.0%
Kona Coffee Living History Farm	10.8%	13.6%	17.1%
Lili'uokalani Park and Garden	8.3%	11.2%	9.4%

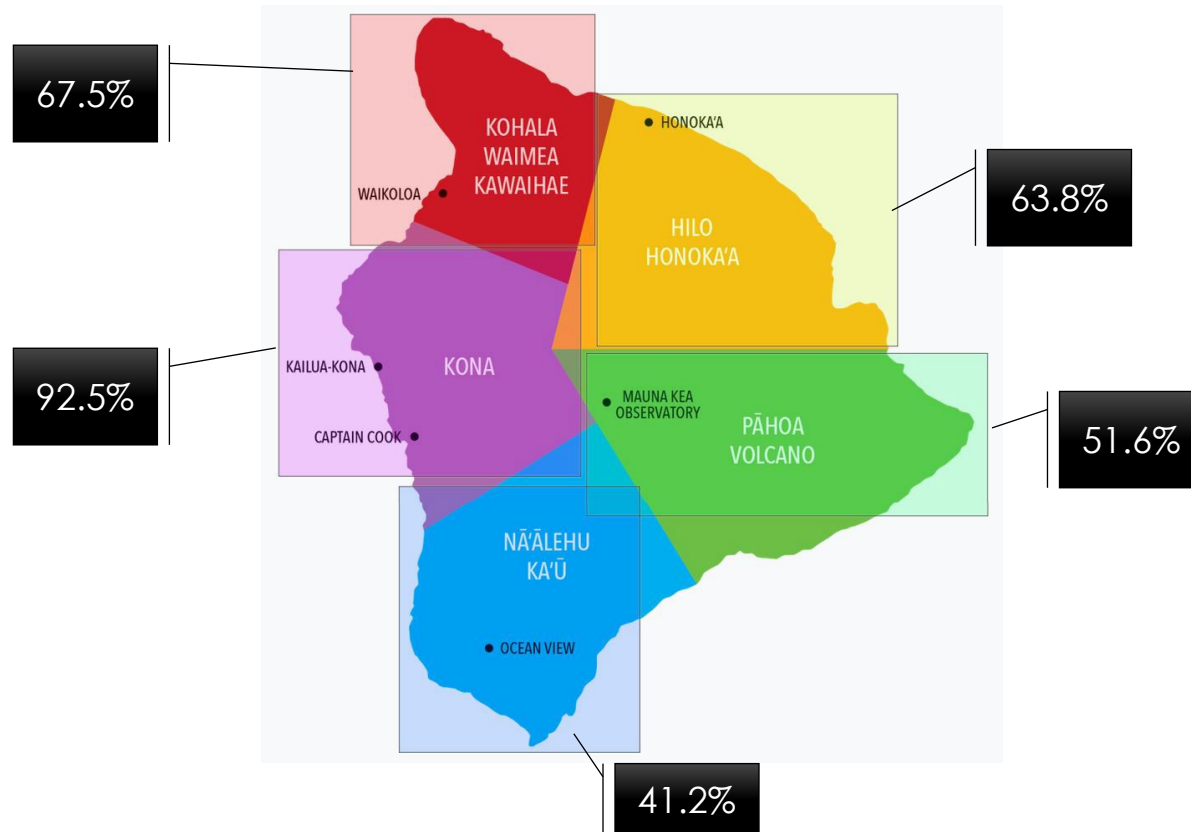
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
Lyman House Memorial Museum	1.3%	0.3%	0.8%
Maunakea Visitor Ctr/ Summit	13.5%	16.4%	19.6%
Orchid Farm	2.0%	1.8%	2.2%
Pacific Tsunami Museum	1.4%	2.7%	0.8%
Pana'ewa Rainforest Zoo & Garden	4.7%	3.6%	4.4%
Pu'uhonua o Honaunau National Historical Park	22.2%	22.4%	14.6%
Pu'ukohola Heia National Historical Site	9.0%	12.7%	10.7%
Punalu'u Black Sand Beach	33.2%	44.5%	43.5%
Rainbow Falls	28.5%	32.4%	32.5%
Volcano Art Center	6.7%	9.4%	9.6%

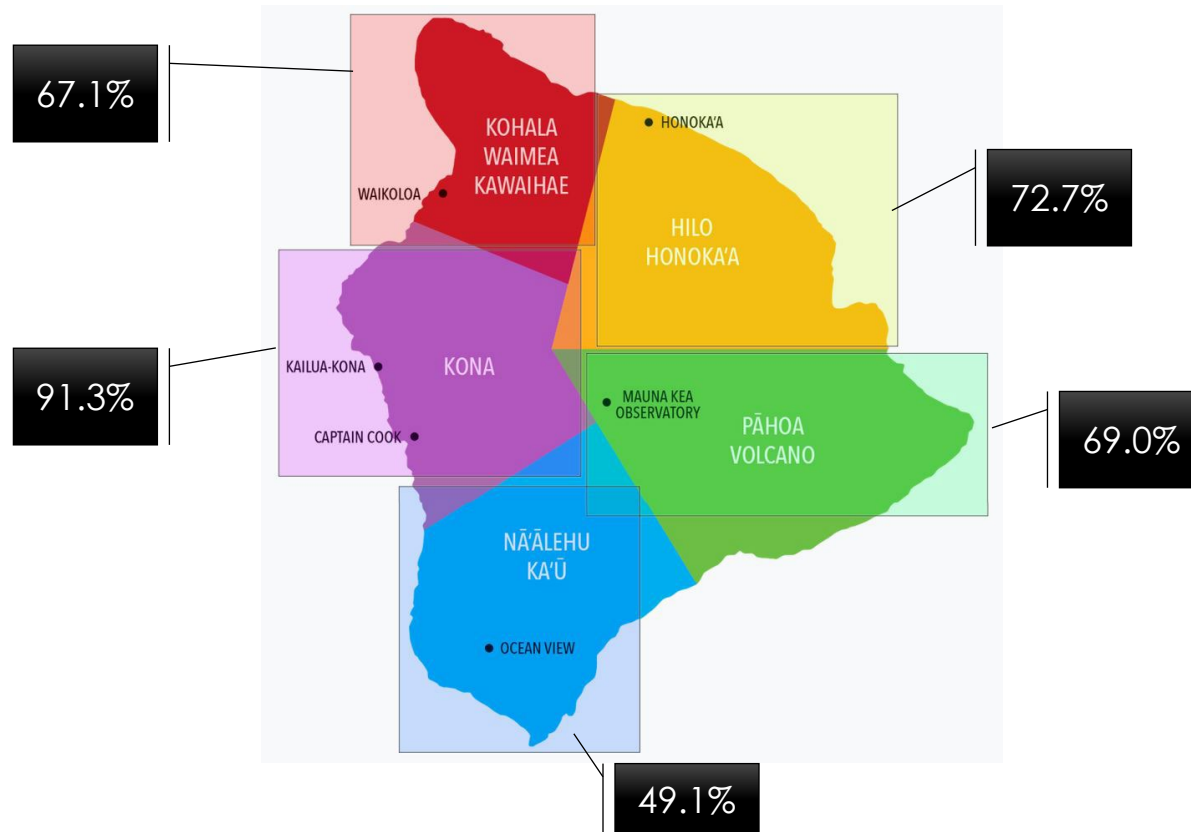
TRAVEL ON ISLAND OF HAWAI'I



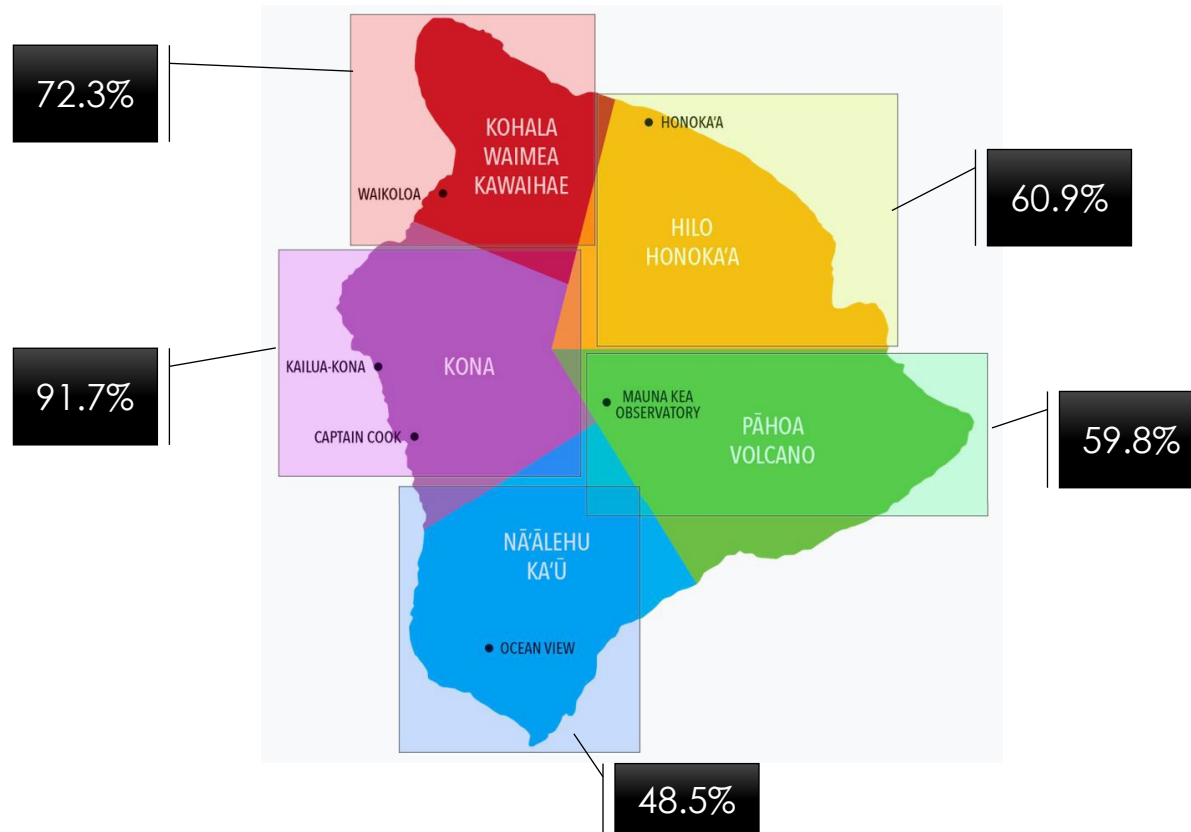
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



AREAS VISITED ISLAND OF HAWAI'I U.S. EAST

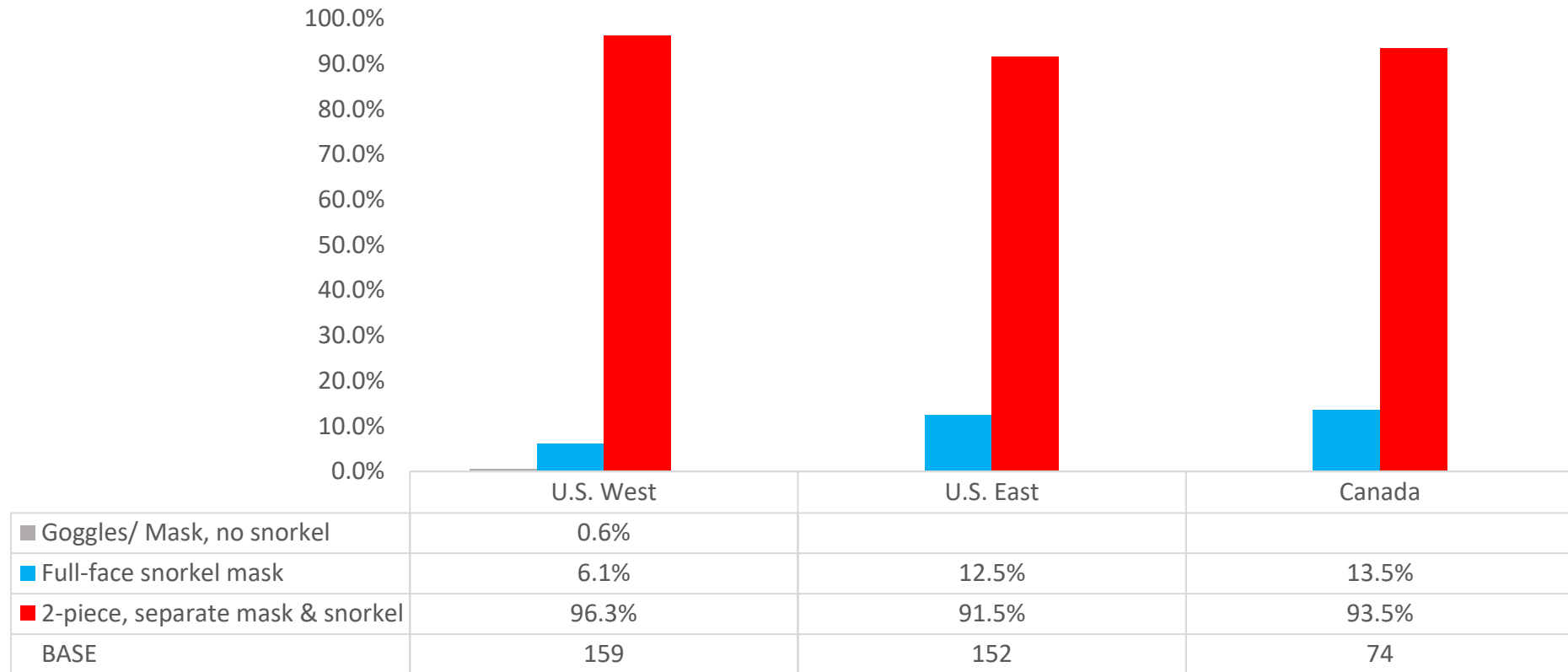


AREAS VISITED ISLAND OF HAWAI'I CANADA



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

SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I

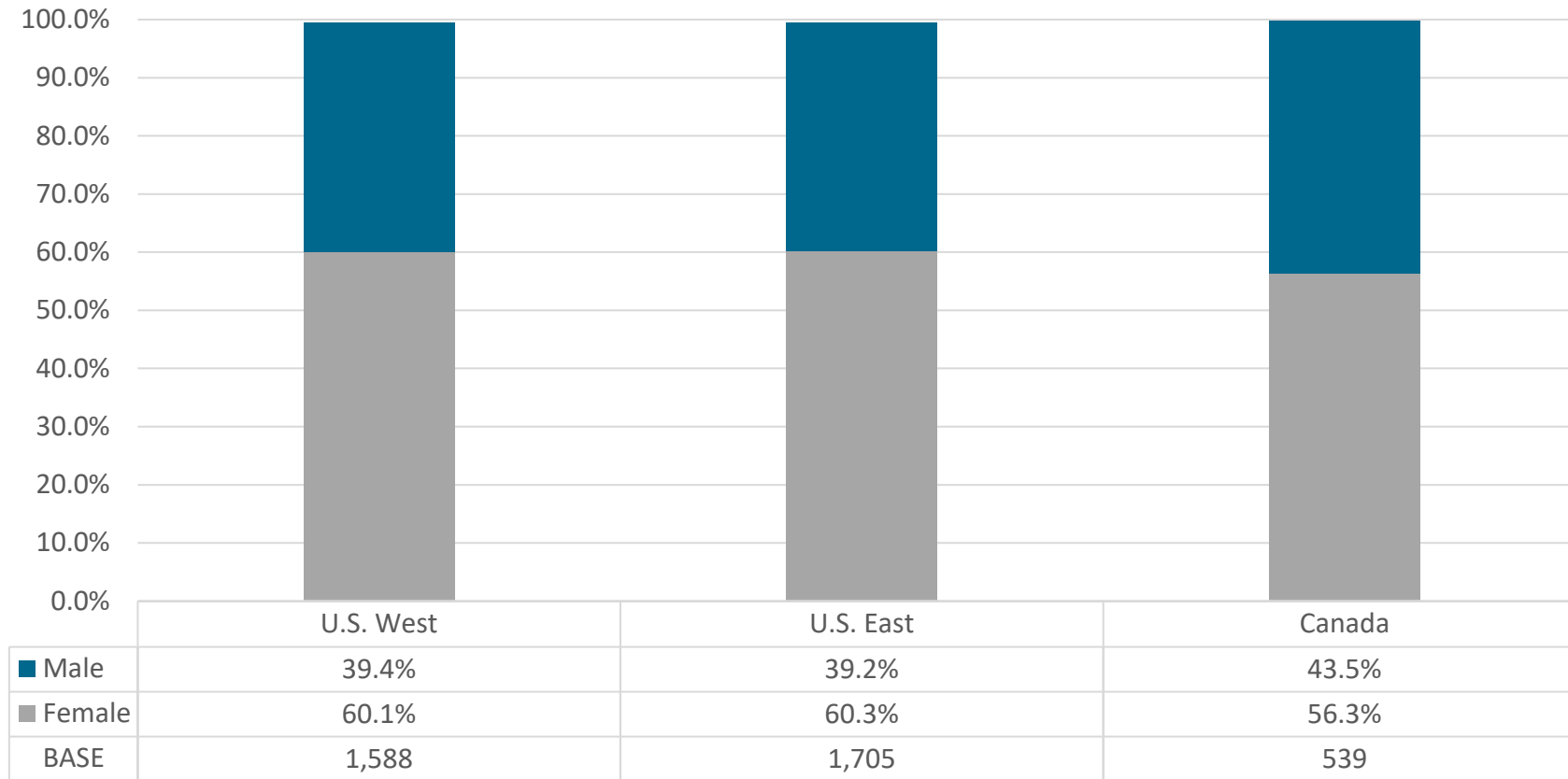


SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

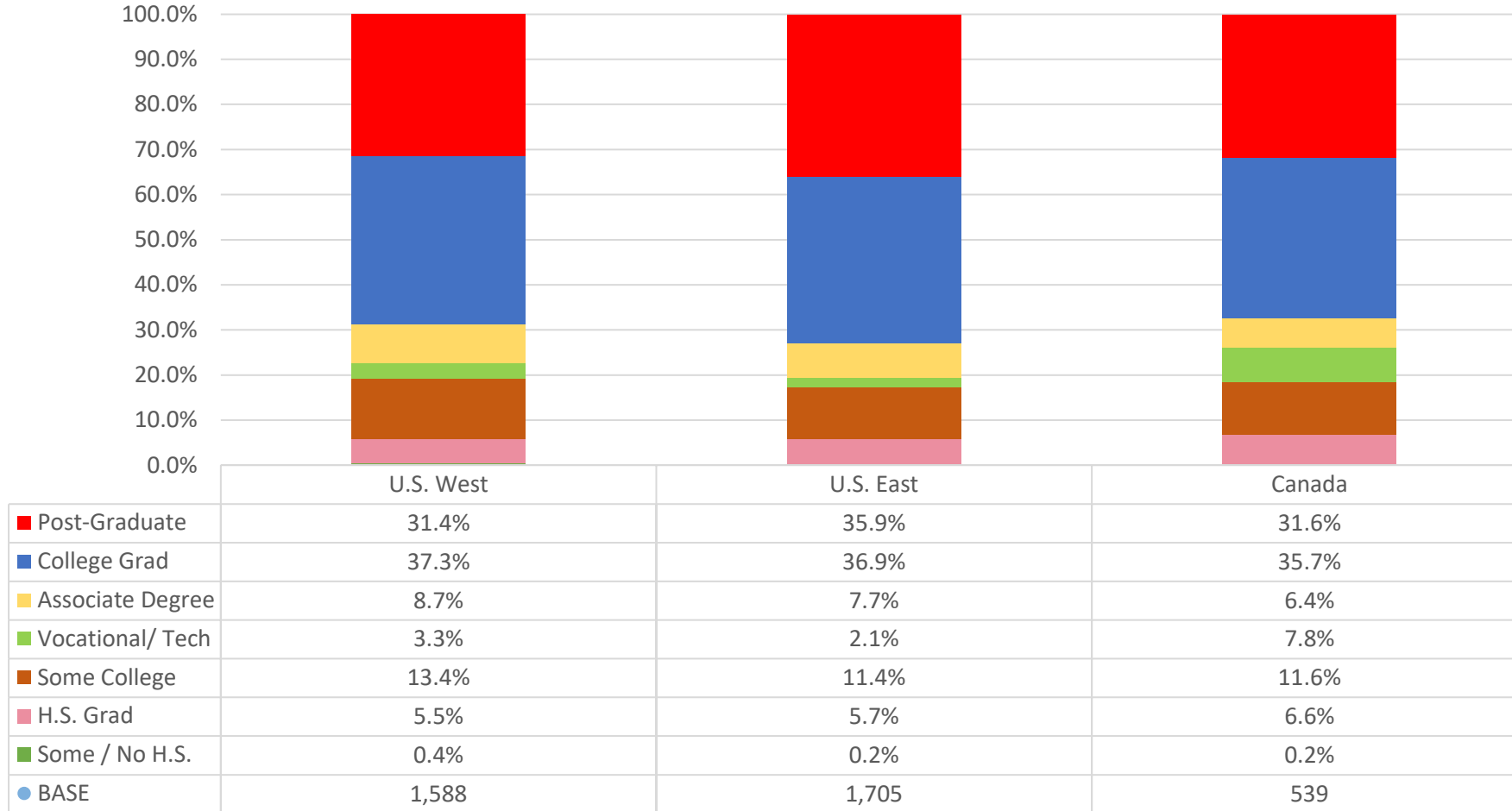
	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	98.8%	98.7%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	1.2%	1.3%	-
Yes, while doing another type of ocean activity	-	-	-
BASE	158	152	74

Section 9 – VISITOR PROFILE

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



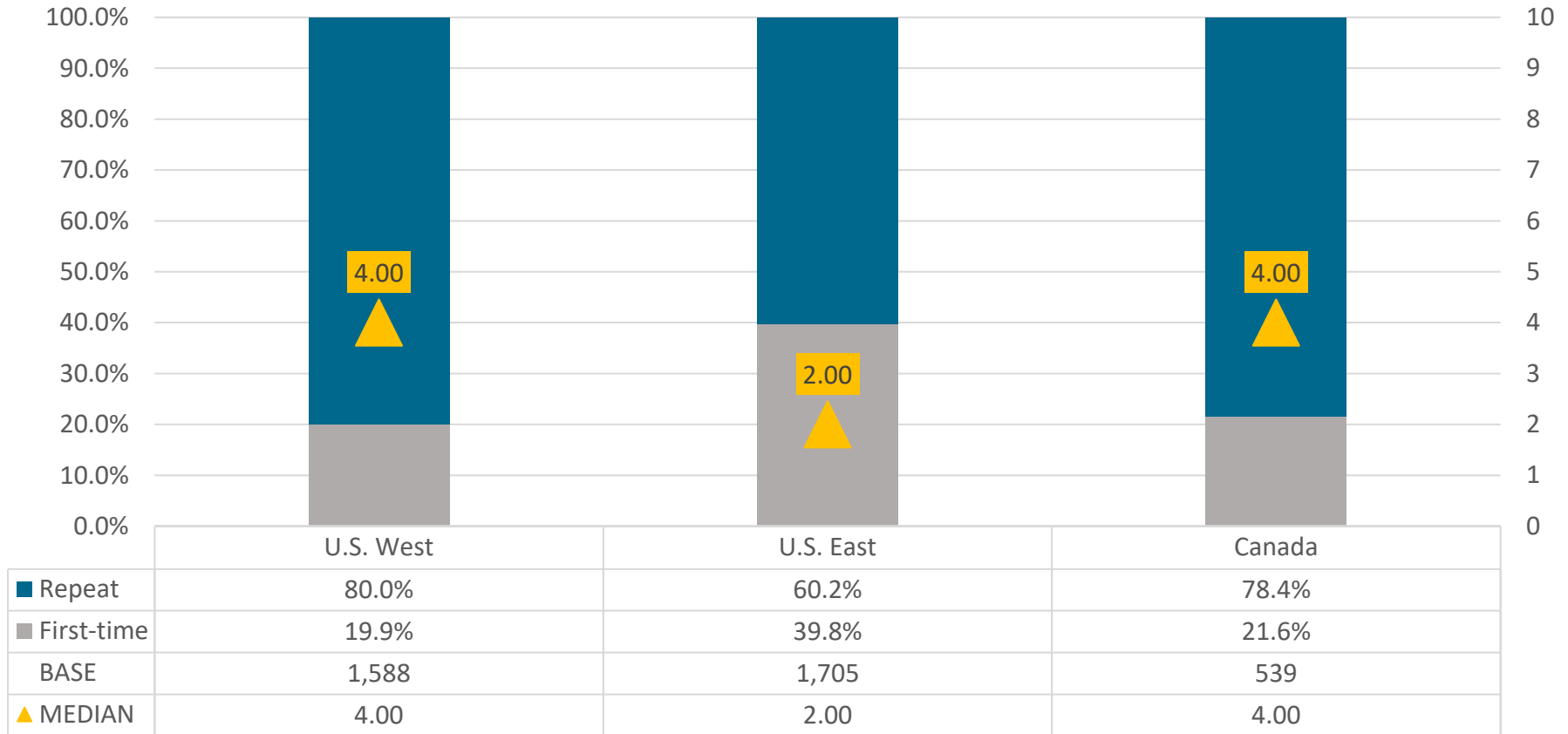
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada
< \$40,000	5.3%	5.4%	3.8%
\$40,000 to \$59,999	6.5%	7.5%	5.2%
\$60,000 to \$79,999	9.0%	10.5%	6.6%
\$80,000 to \$99,999	10.1%	9.8%	10.9%
\$100,000 to \$124,999	13.0%	11.8%	12.4%
\$125,000 to \$149,999	12.2%	11.2%	10.6%
\$150,000 to \$174,999	10.9%	10.3%	11.6%
\$175,000 to \$199,999	7.1%	5.9%	7.8%
\$200,000 to \$249,999	8.9%	8.5%	9.4%
\$250,000 +	17.1%	19.0%	21.6%

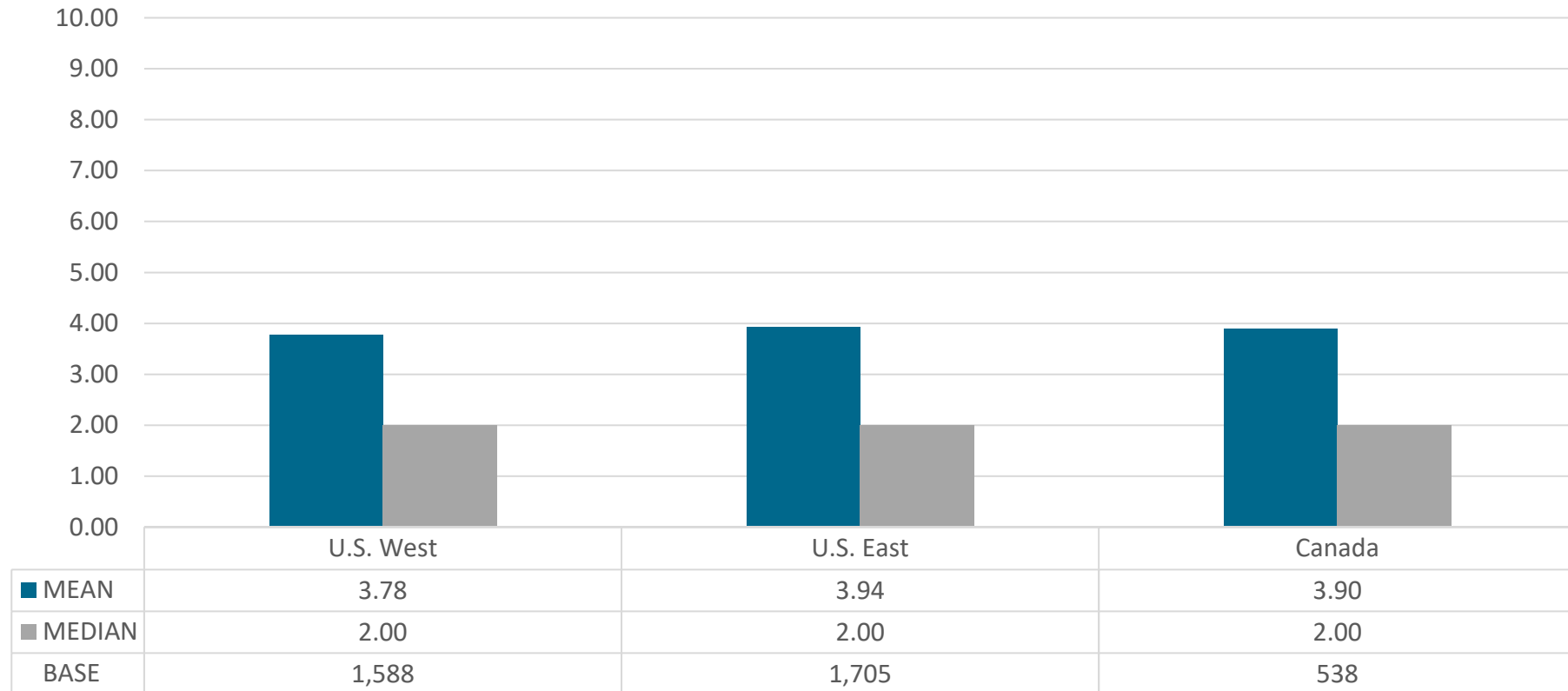
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Canada
Alone	8.9%	10.4%	6.6%
Spouse	59.3%	58.1%	71.4%
Child <18	24.6%	19.2%	24.9%
Other adult family	29.0%	27.1%	25.2%
Friend/ Associate	18.2%	19.5%	15.3%
Girlfriend/ boyfriend	6.6%	6.9%	4.6%
Same sex partner	1.0%	1.0%	0.4%

Section 10 – ISLAND SURVEY METHODOLOGY

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT O'AHU

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

MMA	Completed	Margin of Error ±
U.S. West	687	3.74%
U.S. East	880	3.30%
Canada	222	6.58%
All MMAs	1,789	2.32%

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.

MMA	Completed	Margin of Error ±
U.S. West	248	6.22%
U.S. East	311	5.56%
Canada	94	10.11%
All MMAs	653	3.84%

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.

MMA	Completed	Margin of Error ±
U.S. West	450	4.62%
U.S. East	563	4.13%
Canada	166	7.61%
All MMAs	1,179	2.85%

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.

MMA	Completed	Margin of Error ±
U.S. West	301	5.65%
U.S. East	356	5.19%
Canada	139	8.31%
All MMAs	796	3.47%

140 * Margins of error are presented at the 95% level of confidence