

**2004**

**Visitor Satisfaction  
& Activity Report**



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

# 2004 VISITOR SATISFACTION AND ACTIVITY REPORT

**DBEDT**  
THE DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM  
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## ABOUT THIS REPORT

This report was produced by the staff of the Research and Economic Analysis Division of the Hawaii State Department of Business, Economic Development & Tourism (DBEDT). The department is headed by Mr. Theodore E. Liu. This report was prepared by Mr. Cy S.Y. Feng under the direction of the Division Administrator, Dr. Pearl Imada Iboshi, with the assistance of Dr. Eugene Tian, Ms. Minh-Chau T. Chun, Mr. Lawrence Liu and Ms. Danielle Lee.

Ms. Marsha Wienert, State Tourism Liaison; Mr. Frank Haas, Director of Tourism Marketing, Hawaii Tourism Authority; and Mr. Christopher Kam, Director of the Market Trends, Hawaii Visitors and Convention Bureau, reviewed this report and provided valuable comments.

The report is also available in Adobe Acrobat form on the DBEDT Web Site, <http://www3.hawaii.gov/dbedt/tourism>.

Due to the cost of printing, many of the data such as activities by income level, activities by age, and activities by accommodation are not included in this report but can be found on the DBEDT website.

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

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

# 1. INTRODUCTION



# INTRODUCTION

## **BACKGROUND:**

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

In January 1999 the Legislature transferred the responsibility for visitor related research projects from HVCB to the Department of Business, Economic Development and Tourism (DBEDT). DBEDT began conducting the Visitor Satisfaction study in 2001 and published the survey results on the DBEDT website: <http://www3.hawaii.gov/dbedt/tourism>.

In this report, DBEDT presents visitor satisfaction survey results from the 2004 Visitor Satisfaction Survey. Beginning in 2002, DBEDT began collecting satisfaction results from a survey of Canadian and European visitors.

## **OBJECTIVES:**

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

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

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

## 2. OVERVIEW

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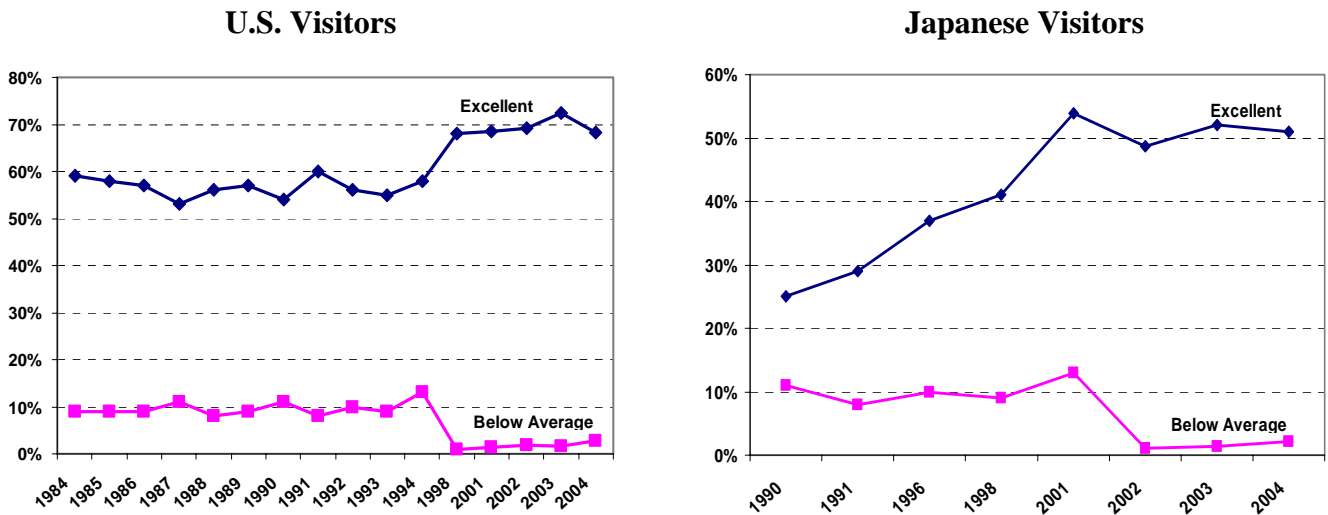
### Overall Satisfaction:

Since the beginning of the visitor satisfaction survey, the State of Hawaii has consistently received high marks as a vacation destination among U.S. and Japanese survey respondents. In 2004 close to 97 percent of the U.S. West, U.S. East, Japanese, Canadian and European survey participants rated their most recent Hawaiian vacation as “excellent” or “above average” (TABLE 4.2).

Although the percentage of “excellent” ratings dropped slightly from 2003, it still comprised over 68 percent of the U.S. visitors, 51 percent of the Japanese visitors, 66 percent of the Canadian visitors and 67 percent of the European visitors who participated in the 2004 visitor satisfaction survey.

Ratings of “Below average” continued to comprise a very small portion of the total U.S. (2.8%), Japanese (2.1%), Canadian (3.1%) and European (2.4%) respondents while “poor” ratings accounted for less than 0.4 percent of the survey participants from each of these visitor markets.

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



### Likelihood to Recommend/Revisit:

While the majority of visitors gave high satisfaction marks, it may be even more important to know how likely a visitor is to return to the islands and if they will recommend Hawaii to others. Results from the 2004 survey show that statewide, close to 89 percent of all U.S. respondents answered that they would “very likely” recommend Hawaii as a vacation place to their friends and relatives, virtually unchanged from 2003. A slightly lower percentage of the Japanese visitors surveyed in 2004 responded that they would “very likely” recommend Hawaii (69.3%) compared to 73.1 percent in the previous year. Similar to 2003, about 84

percent of the Canadian visitors surveyed and 79 percent of the European respondents would recommend the islands to their friends and relatives (TABLE 4.4).

When asked about the likelihood of returning to Hawaii in the next five years, the percentage of U.S. West, U.S. East and Japanese respondents who said that they will “very likely” do so were lower compared to 2003 (TABLE 4.11).

Close to 65 percent of the 2004 U.S. respondents said that they would “very likely” do so compared to 66.6 percent in 2003. 14 percent said that they would be “not too likely” or “not at all likely” to return. The top two reasons given by 2004 U.S. visitors who said that they would not revisit the islands was that they “want to go someplace new” (49%) and that Hawaii is “too expensive” (48.7%) (TABLE 4.12).

About 49 percent of the Japanese visitors surveyed in 2004 were “very likely” to return to the islands within the next five years, compared to 56.4 percent in 2003. “Want to go someplace new” (58%) was the top answer given by the 2004 Japanese respondents who said that they would not likely return. The “flight is too long” (22.5%) and Hawaii is “too expensive” (20.6%) were the next most common reasons given by the respondents.

Over half (52.8%) of the Canadians polled in the 2004 survey will “very likely” return to Hawaii in the near future, virtually unchanged from the previous year. Hawaii is “too expensive” was the response given by 50.4 percent of those who said that they would not likely revisit the islands, which was down from 64.4 percent in 2003. Close to 49 percent said that they “want to go someplace new” compared to 30.1 percent in 2003.

Nearly 36 percent of the European visitors surveyed in 2004 said that they will “very likely” return to the islands in the next five years. This is not statistically significant from the 37.6 percent in 2003. Of those who would not likely come back, 58.1 percent responded that they “want to go someplace new” while 54.4 percent said that the “flight was too long”.

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

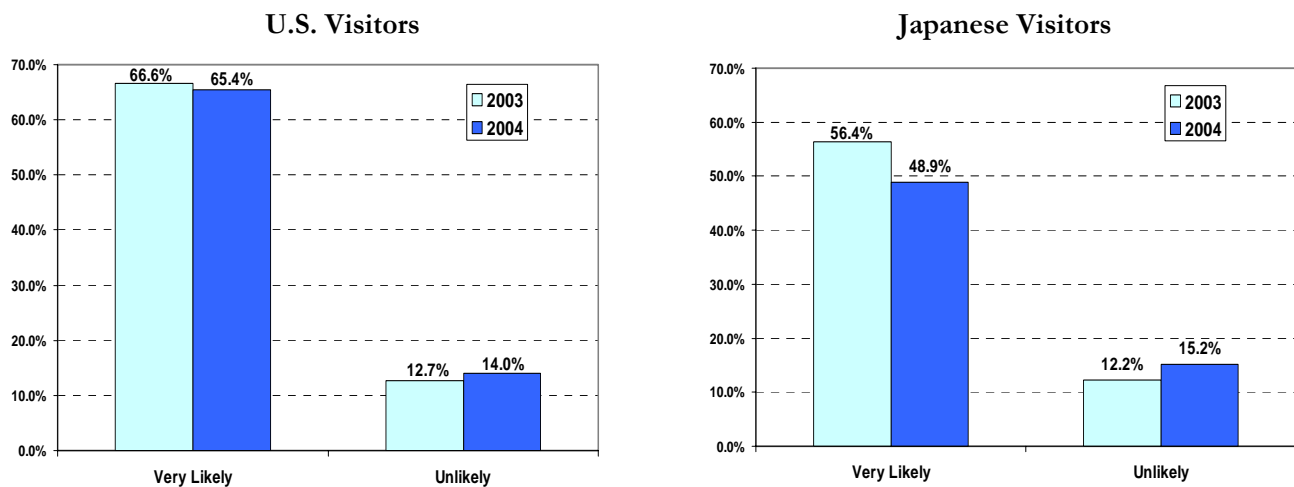


Figure 3: Likelihood of Visiting Hawaii in the Next Five Years  
(% of visitors)

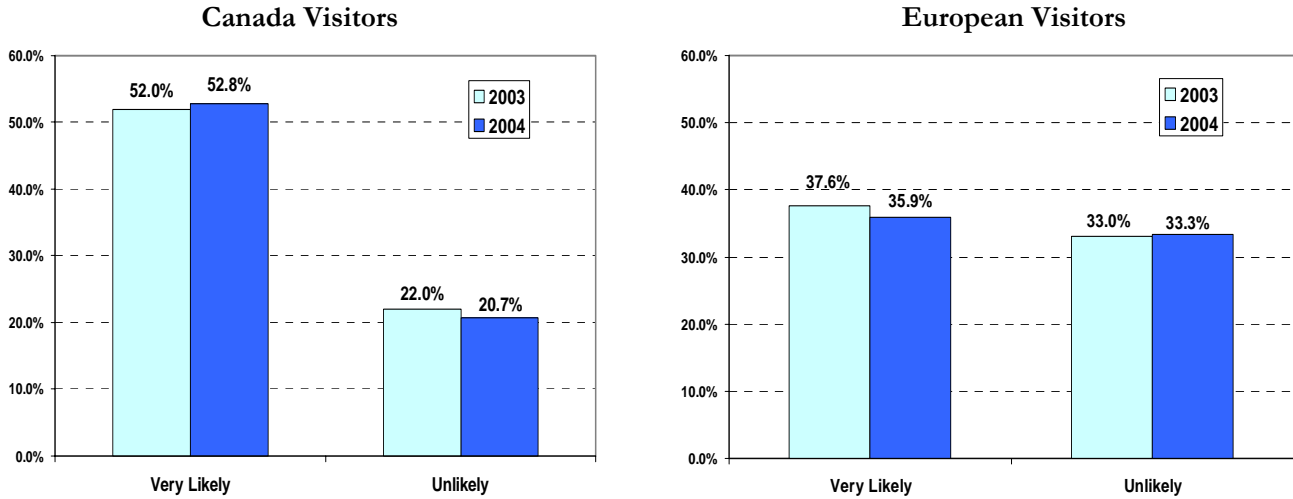


Figure 4: Reasons for Not Revisiting Hawaii : U.S. Visitors  
(% of U.S. Visitors)

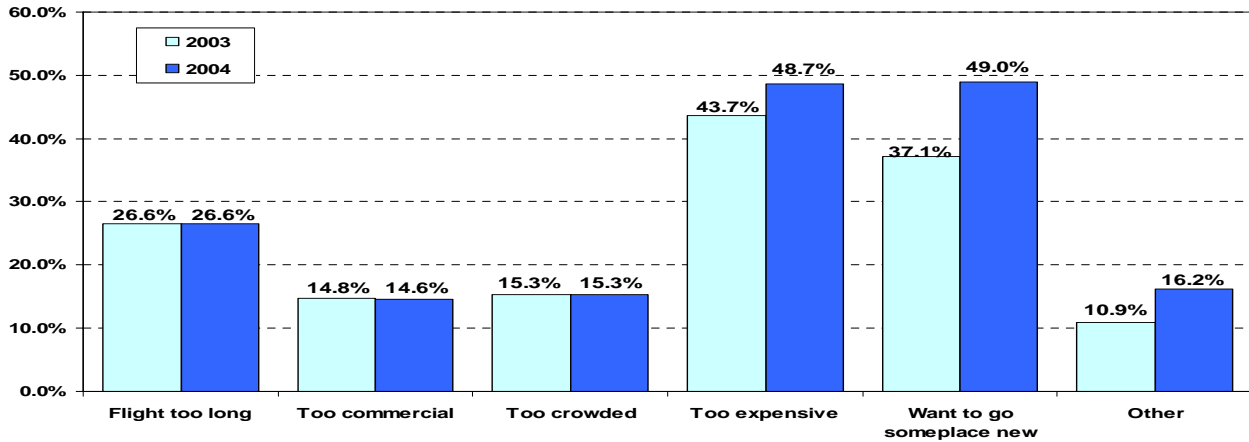
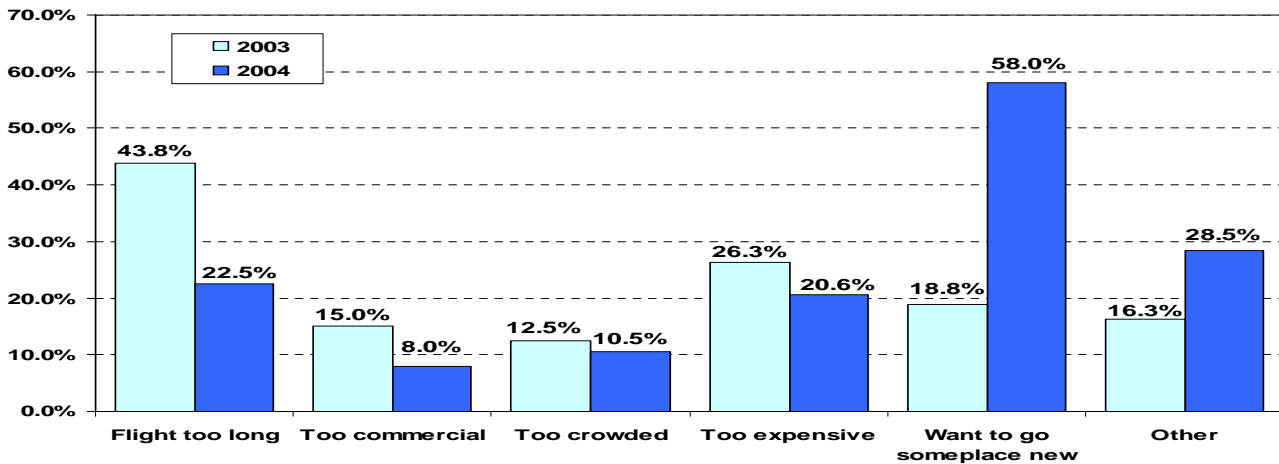
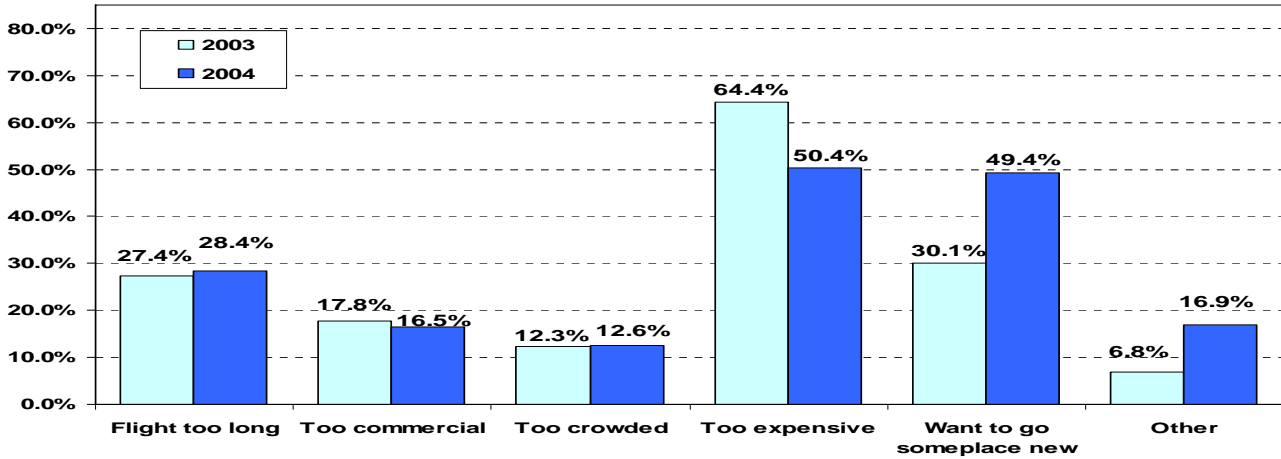


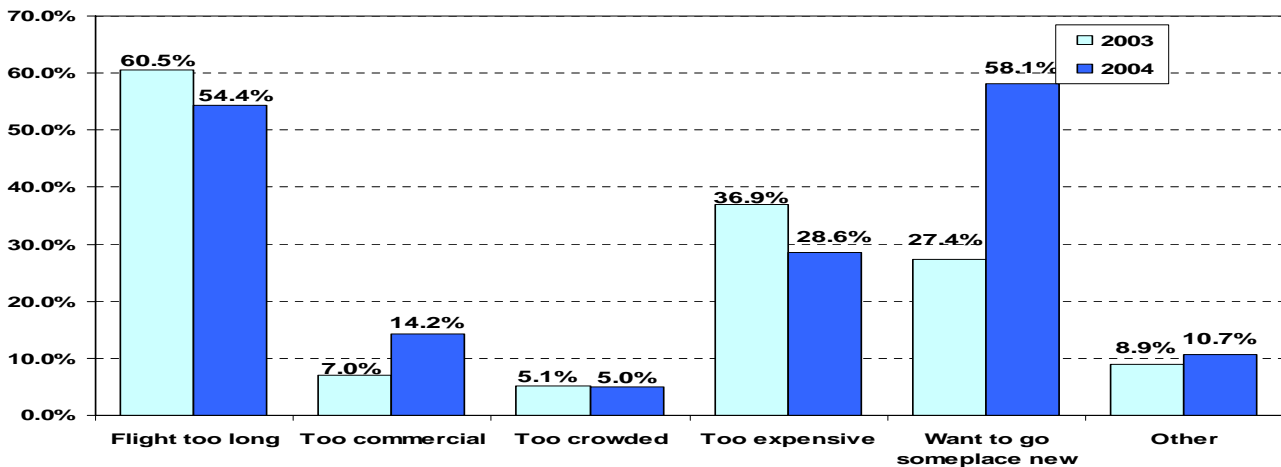
Figure 5: Reasons for Not Revisiting Hawaii : Japanese Visitors  
(% of Japanese Visitors)



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



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



**Satisfaction Rating by Island:**

Each Hawaiian island continued to receive either “excellent” or “above average” ratings from over 90 percent of visitors who responded to the 2004 survey (TABLE 4.1).

Although the percentage of “excellent” ratings was lower compared to 2003, the majority of the U.S. respondents still gave “excellent” marks to the islands they visited. Kauai (73.3%) received the highest percentage of “excellent” ratings, followed by Maui (70.3%), the Big Island (63.2%), Lanai (60.9%), Molokai (57.8%) and Oahu (55.8%).

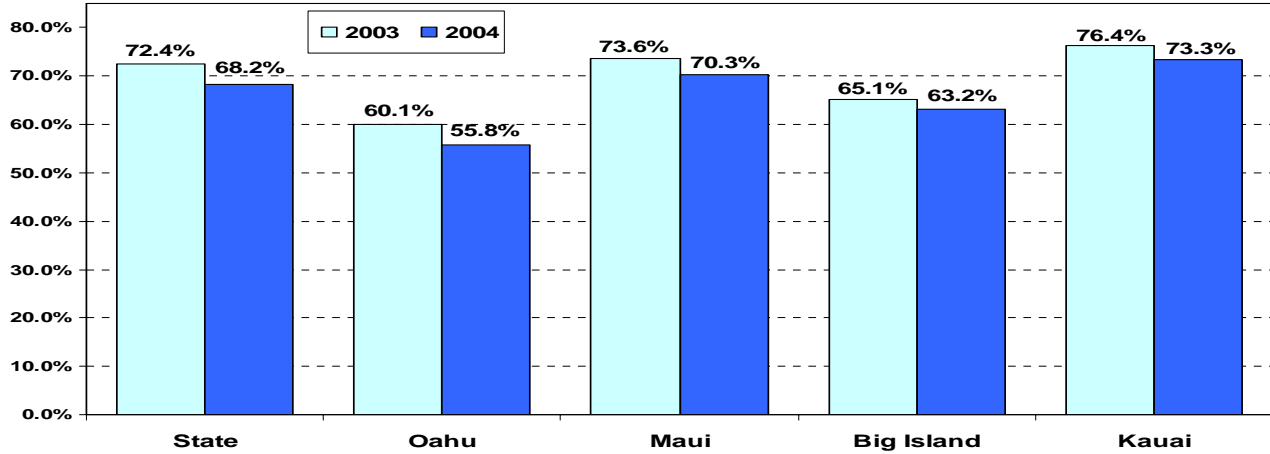
“Excellent” ratings given by Japanese respondents who visited Kauai in 2004 were higher than those who visited this island in the prior year. Over half of the Japanese respondents who visited the Big Island, Oahu and/or Maui gave “excellent” marks to their stay on these islands.



Approximately 69 percent of the Canadian respondents who visited Maui in 2004 rated this island as “excellent” while 66.4 percent of those who went to Kauai gave their experience the highest mark. Oahu and the Big Island had slightly lower “excellent” responses.

The majority of the European respondents who went to Kauai, Maui, the Big Island, Oahu and/or Lanai in 2004 gave the island they visited “excellent” marks.

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



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

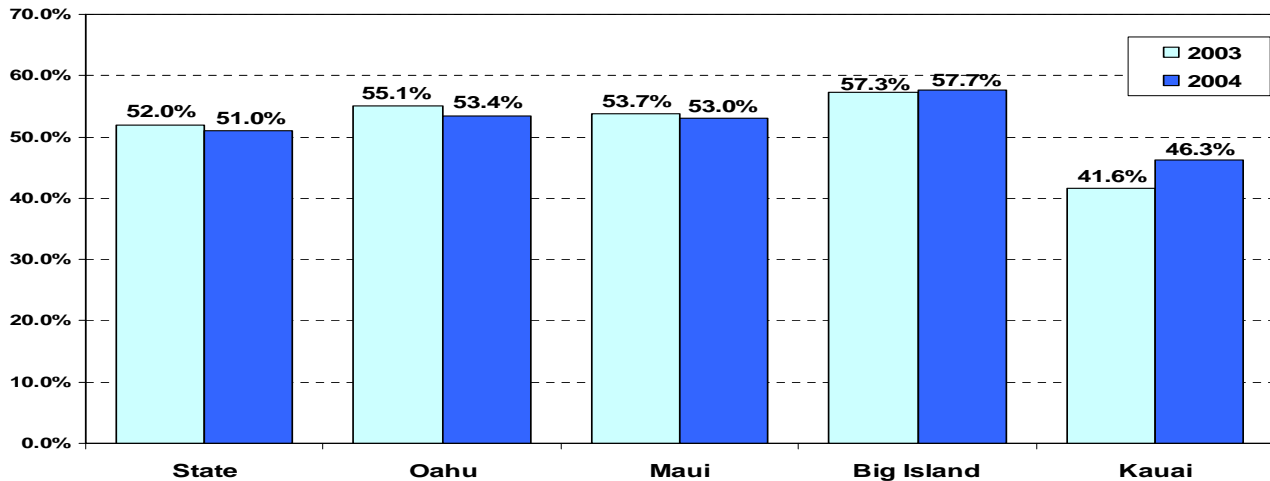


Figure 10: Percentage of “Excellent” Satisfaction Ratings by Island : Canadian Visitors

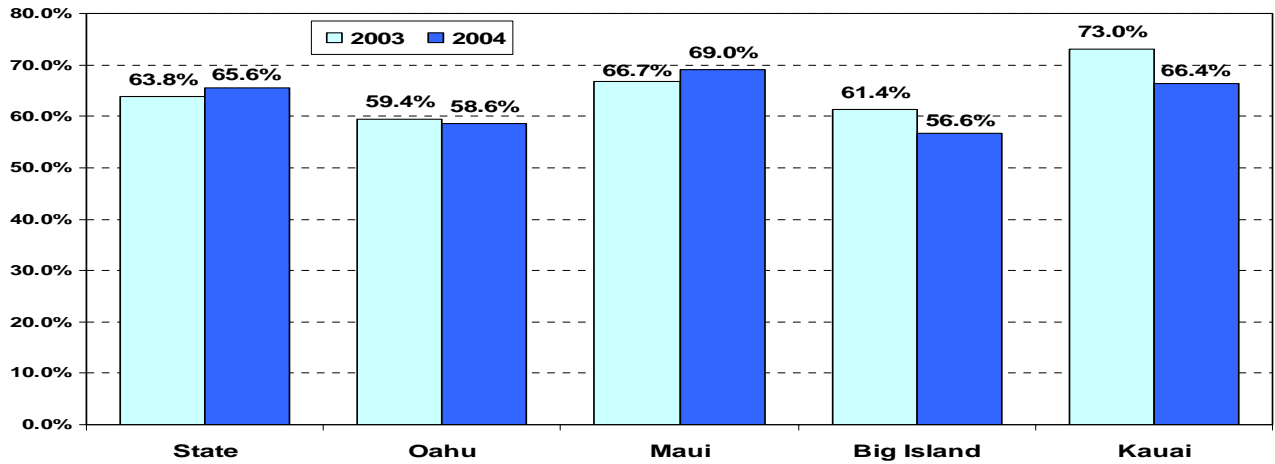
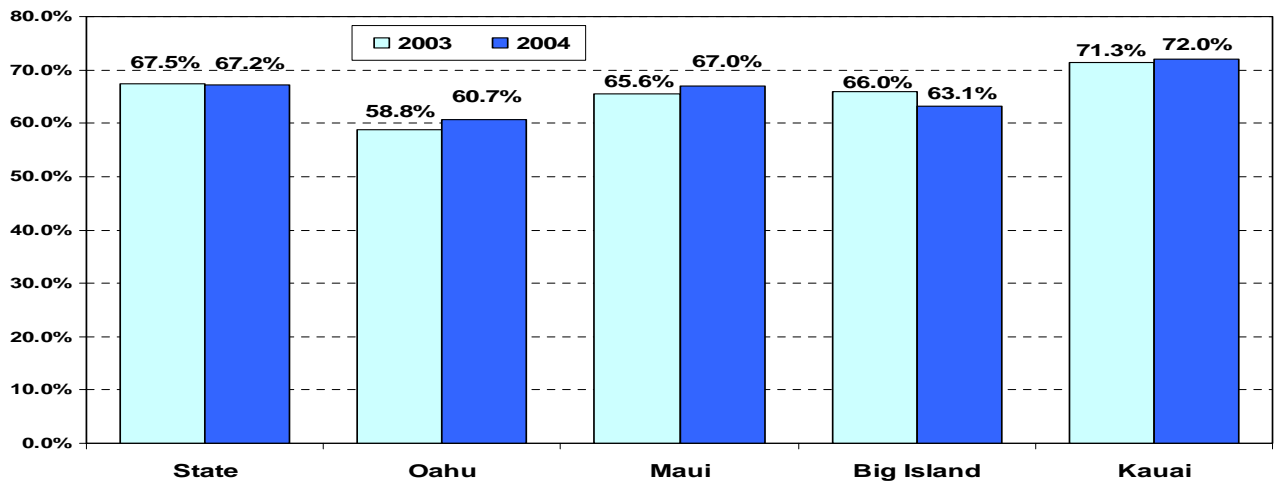


Figure 11: Percentage of “Excellent” Satisfaction Ratings by Island : European Visitors



**Participation in Activities:**

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

Similar to all respondents in 2003, shopping and sightseeing while in Hawaii continue to be the top two activities of those surveyed in 2004. Recreation was the third most popular activities for U.S., Canadian and European respondents while entertainment was third with respondents from Japan. Cultural activities were more popular with U.S., Canadian and European respondents compared with their Japanese counterparts (TABLES 5.1 TO 5.6).

Figure 12: 2004 Activity Participation (% of Visitors)

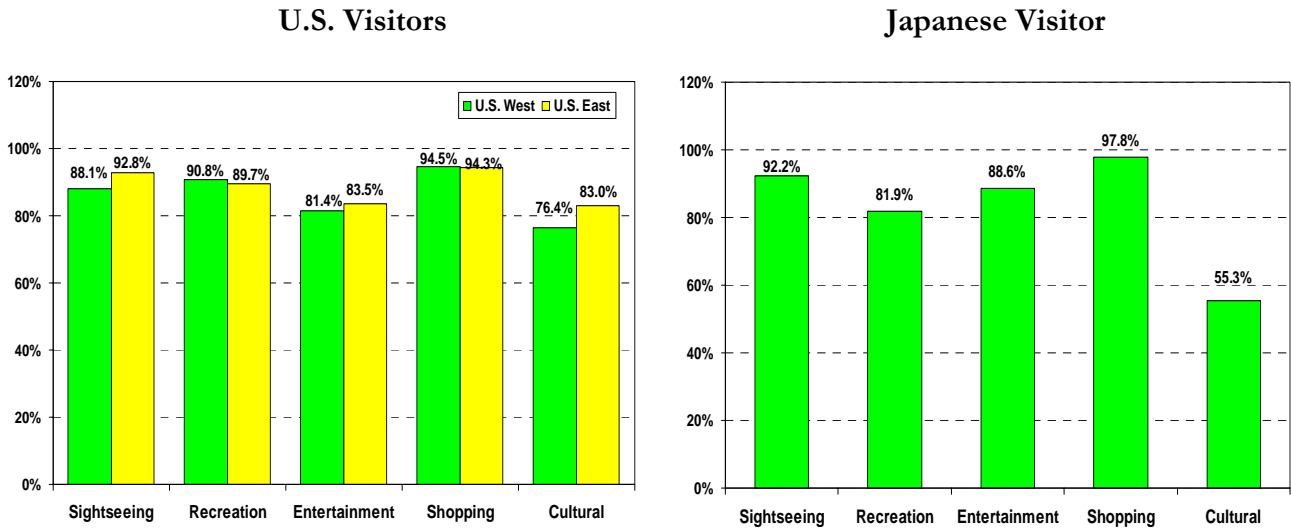
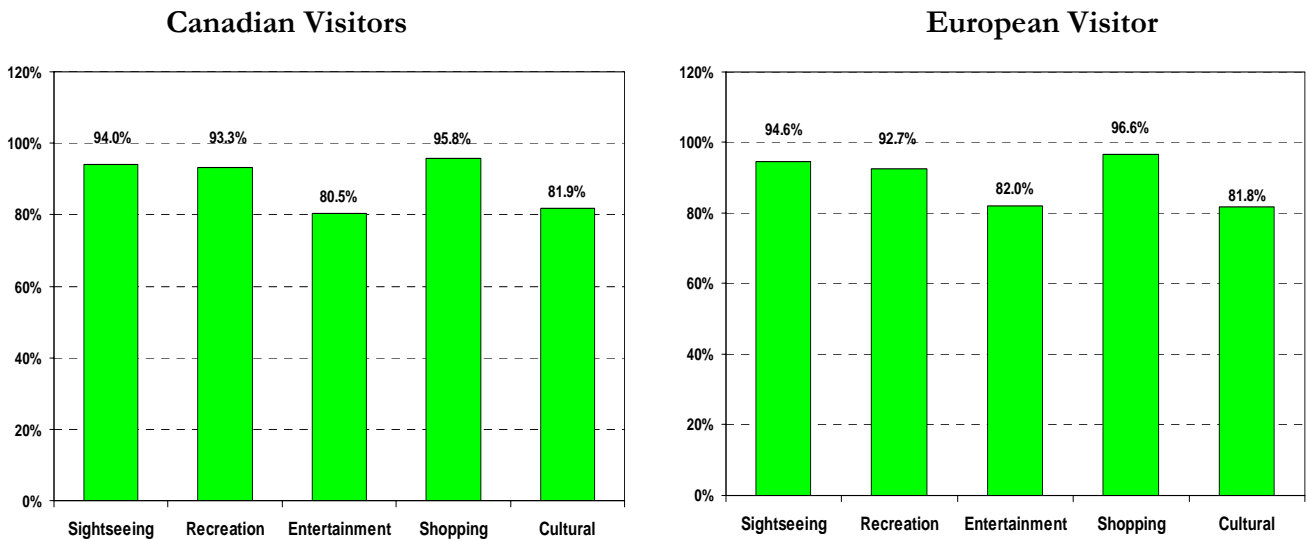


Figure 12: 2004 Activity Participation (% of Visitors)



**Trip Planning and Booking Timetable:**

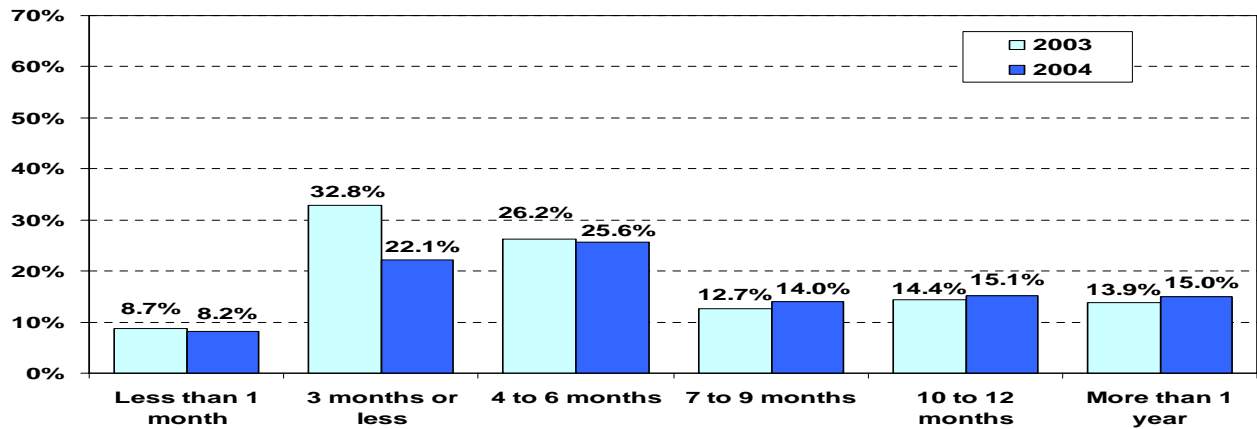
The survey also asked visitors about how and when they made their travel plans. Results show that Japanese respondents have a much shorter planning and booking window than U.S., Canadian and European visitors (TABLES 6.1 TO 6.6).

Over half (56%) of the Japanese visitors surveyed in 2004 took three months or less to decide to take a vacation, while 61.4 percent took three months or less to decide on Hawaii as a vacation destination, compared to 57.8 percent and 63.5 percent, respectively from

those surveyed in 2003. The share of 2004 Japanese respondents who took less than one month to make these decisions is higher compared to other visitors surveyed.

In contrast, the majority of the U.S., Canadian and European respondents took more than three months to decide to take a vacation and to choose Hawaii as their destination. There was a significant increase in the length of time European visitors took to plan their trips.

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



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

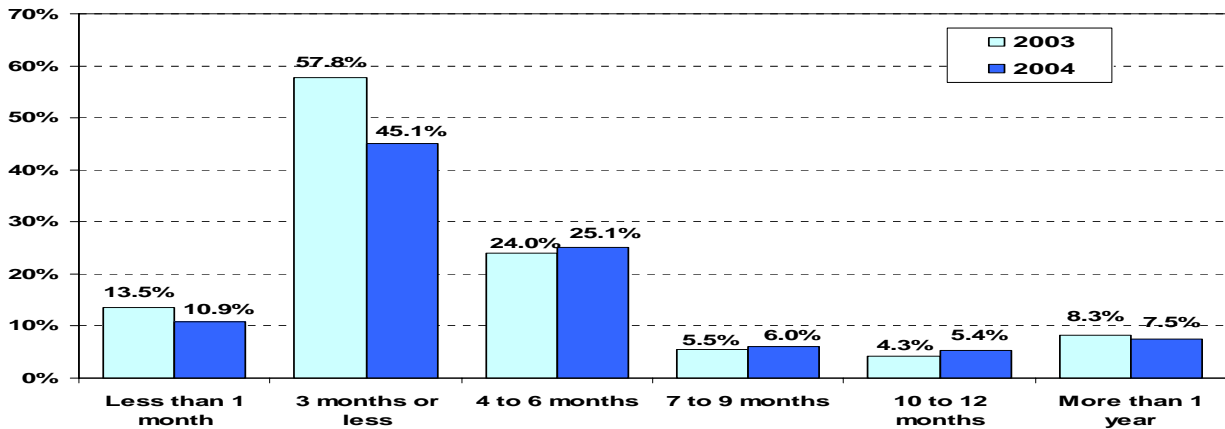


Figure 16: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure:  
Canadian Visitors (% of Canadian Visitors)

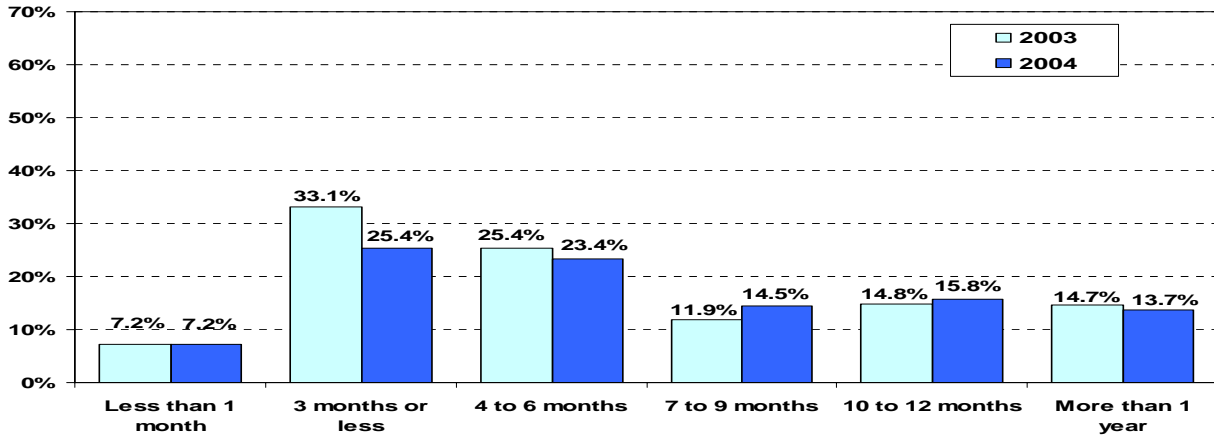


Figure 17: Timeframe in Deciding to Take Vacation/Pleasure Trips Before Departure:  
European Visitors (% of European Visitors)

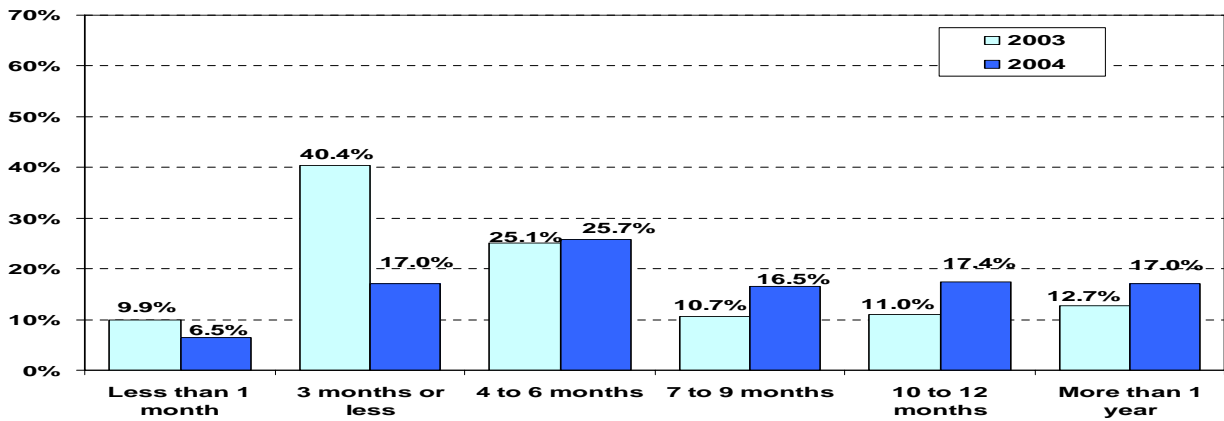


Figure 18: Timeframe in Deciding to Visit Hawaii Before Departure:  
U.S. Visitors (% of U.S. Visitors)

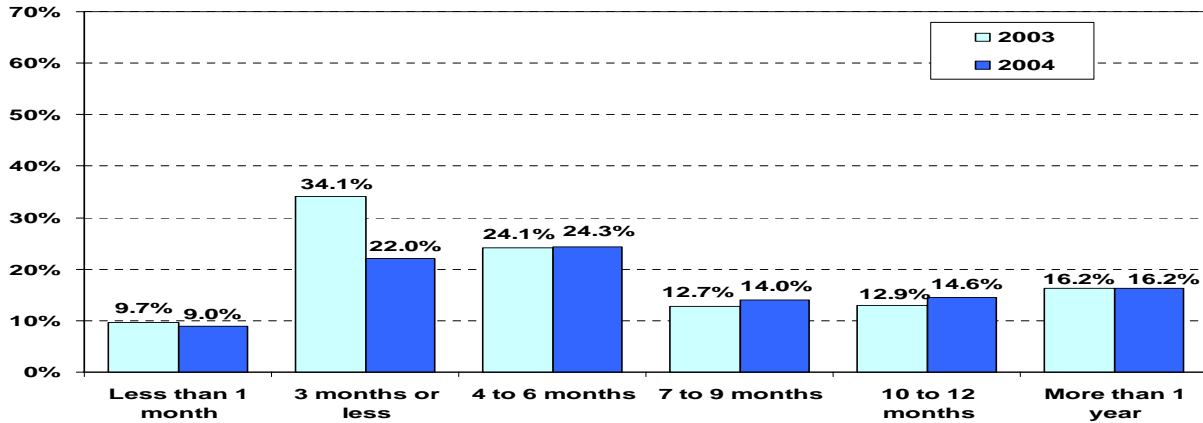


Figure 19: Timeframe in Deciding to Visit Hawaii Before Departure:  
Japanese Visitors (% of Japanese Visitors)

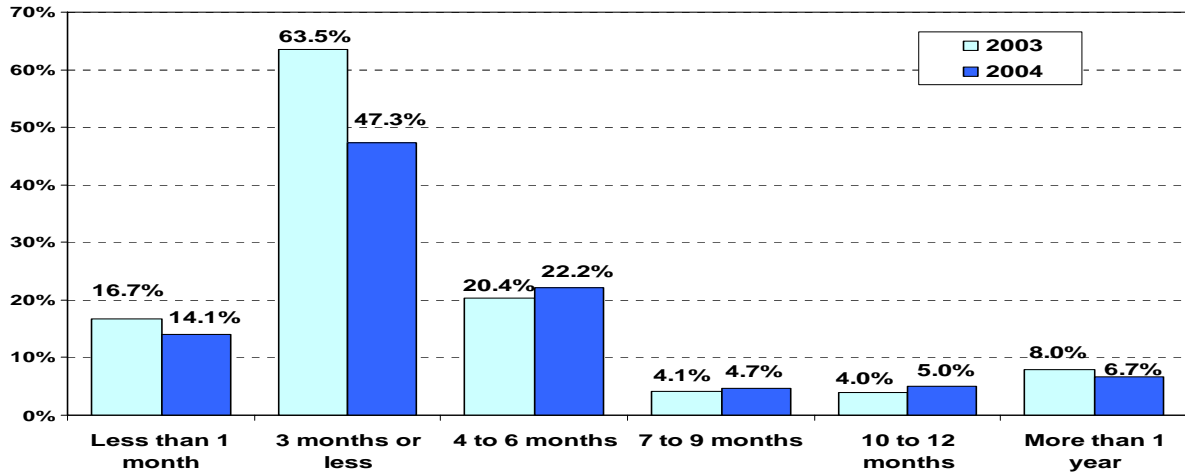


Figure 20: Timeframe in Deciding to Visit Hawaii Before Departure:  
Canadian Visitors (% of Canadian Visitors)

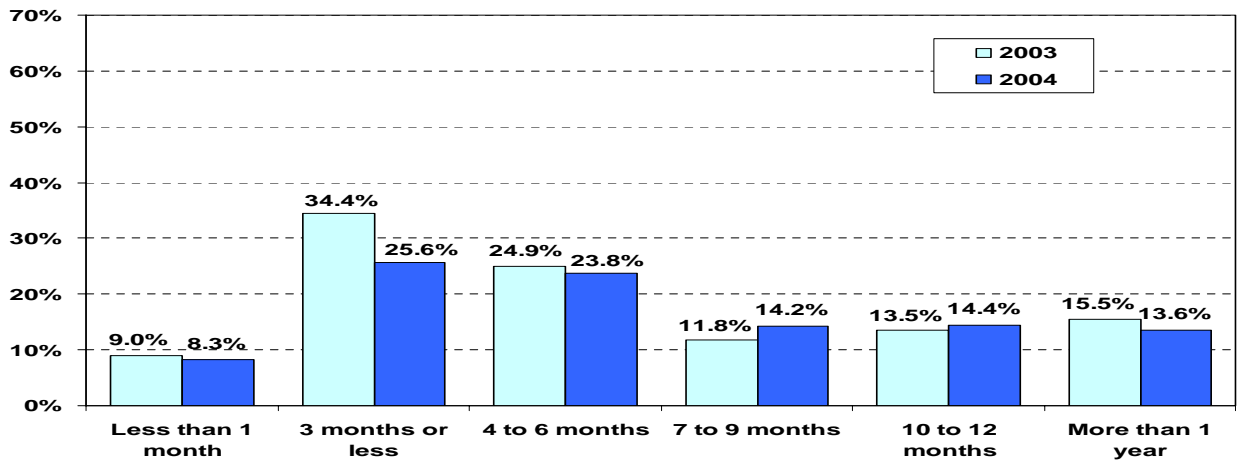
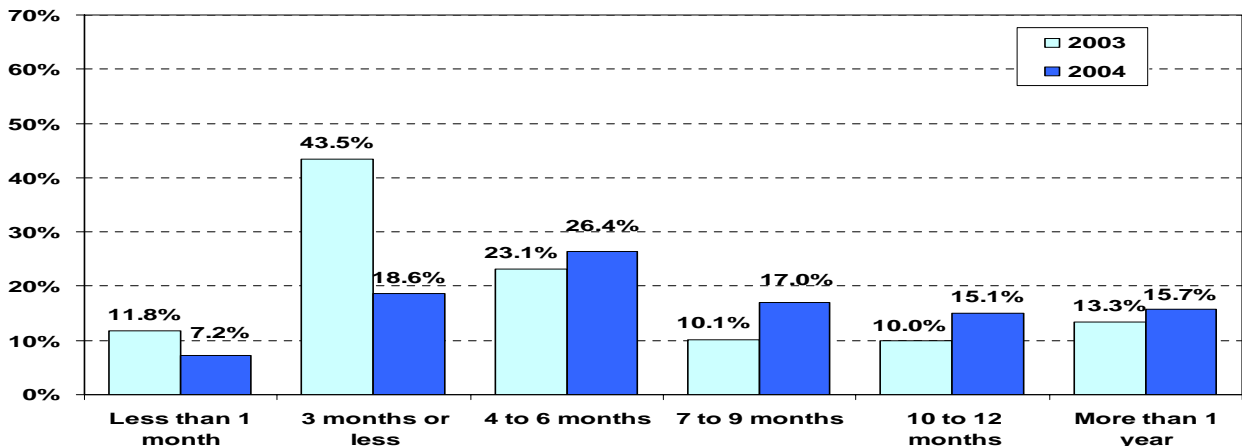


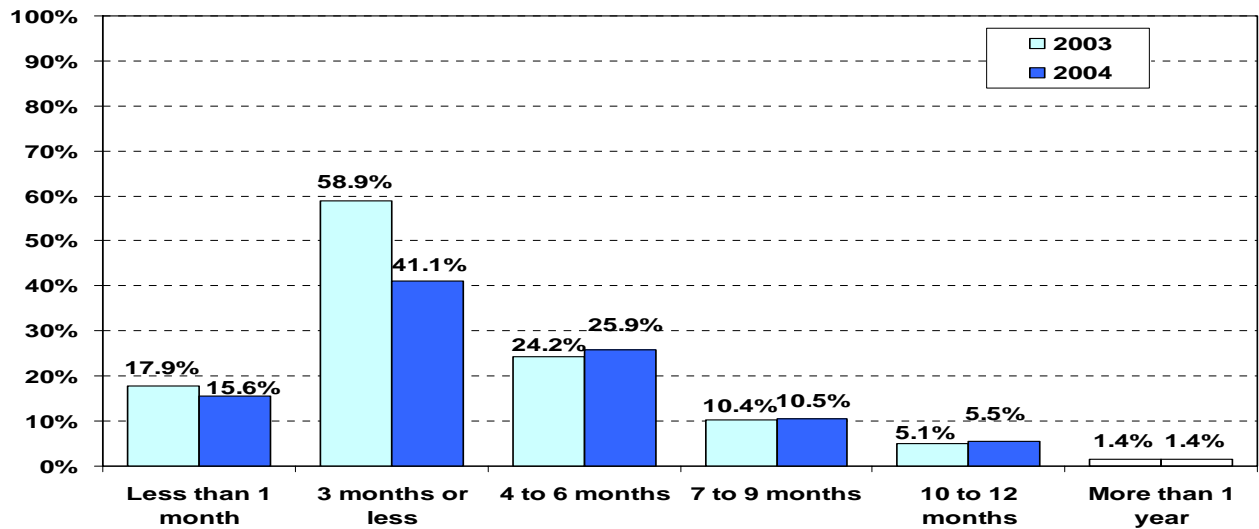
Figure 21: Timeframe in Deciding to Visit Hawaii Before Departure:  
European Visitors (% of European Visitors)



Close to 88 percent of the Japanese respondents purchased their tickets within three months or less before their trip, compared to 89.6 percent in 2003. In contrast, 56.7 percent of the U.S. visitors surveyed in 2004 purchased their tickets three months or less before their trip compared to 58.9 percent of the respondents in 2003.

Similar to the U.S. respondents, 55.9 percent of the Canadian and 44.2 percent of the European respondents in 2004 purchased their tickets three months or less before their trip to the islands.

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



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

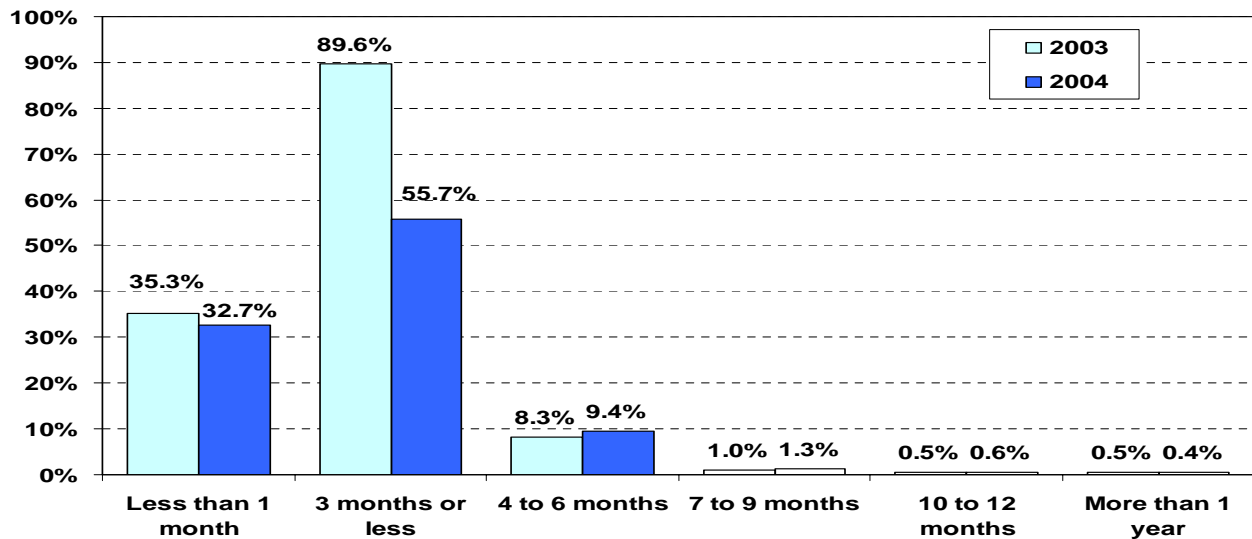


Figure 24: Timeframe in Purchasing Tickets Before Departure:  
Canadian Visitors (% of Canadian Visitors)

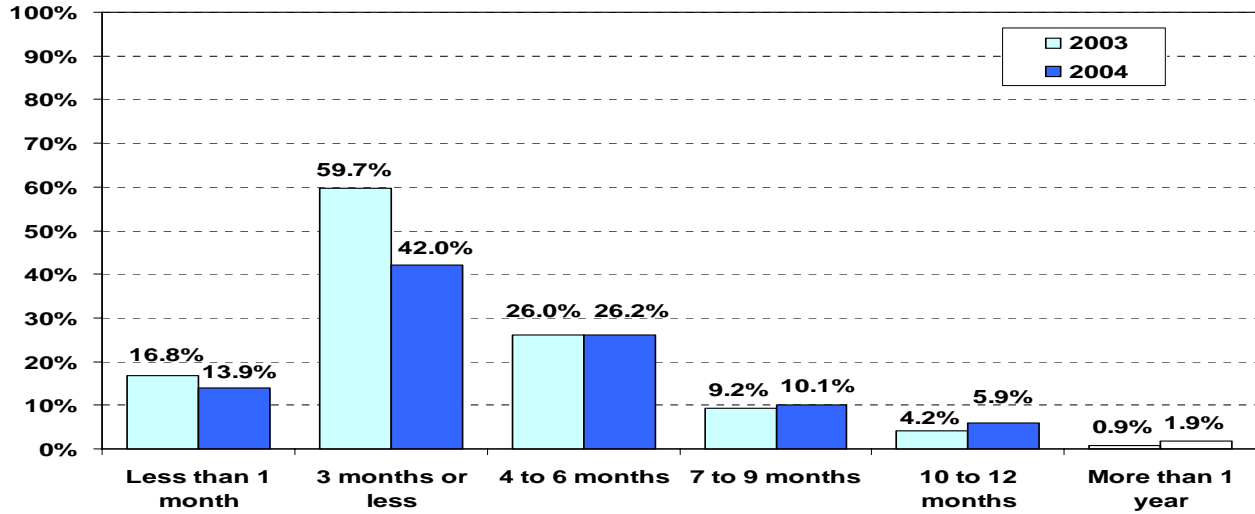
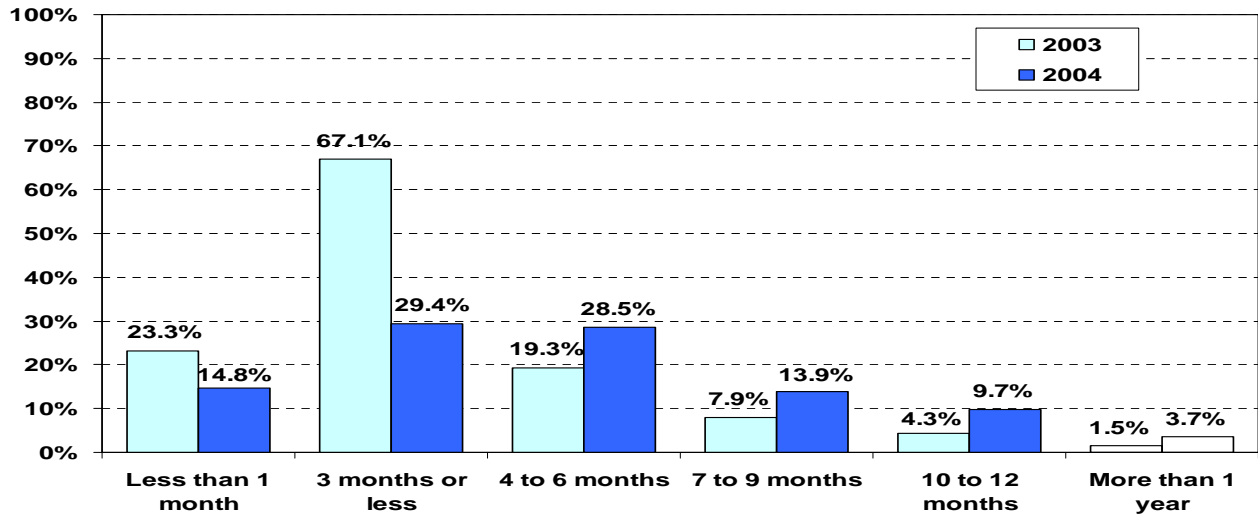


Figure 25: Timeframe in Purchasing Tickets Before Departure:  
European Visitors (% of European Visitors)





### 3. SATISFACTION AND RATING



## SATISFACTION AND RATING

Similar to previous years, the majority of the U.S. West and U.S. East visitors surveyed in 2004 awarded high ratings to their experiences with shopping, transportation, activities and attractions, accommodations, restaurants, golf, airports, parks and beaches while in Hawaii. The percentages of U.S. West and U.S. East respondents who were “very satisfied” with these experiences ranged from mid 50’s to 75 percent.

Visitors from Japan continue to be more critical. While fewer (17% to 48%) Japanese respondents gave “very satisfied” ratings, the majority was still “satisfied” with their experiences in Hawaii. Over half of the Canadian and European respondents gave “very satisfied” marks to most of their experiences in the islands. Across all visitor markets, transportation received the highest dissatisfaction ratings (TABLES 3.1 TO 3.6).

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

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

More first time visitors surveyed were “very satisfied” with Hawaii’s accommodations, shopping golf courses, activities and attractions, transportation, airports and parks and beaches than repeat visitors from the U.S. West (TABLE 3.8).

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

More repeat visitors were “very satisfied” with Hawaii’s accommodations, restaurants, golf courses and airports than first time visitors (TABLE 3.9).

**Japanese Visitors:** Hawaii’s park and beaches, activities and attractions and restaurants received a higher percentage of “very satisfied” ratings from younger visitors than from other Japanese respondents. A greater percentage of wedding and honeymoon visitors were “very satisfied” with their accommodations, shopping, golf courses, transportation and airports (TABLE 3.10).

More first time respondents were “very satisfied” with all categories except golf courses, which received a higher percentage of “very satisfied” ratings from repeat visitors.

**Canadian Visitors:** A higher percentage of seniors were “very satisfied” with the accommodations, shopping, transportation and airports in Hawaii compared to other Canadian respondents. More younger visitors were “very satisfied” with the restaurants and golf courses in the islands while more families were “very satisfied” with the activities and attractions (TABLE 3.11).

A higher number of repeat visitors were “very satisfied” with the accommodations, shopping, transportation and airports than first time visitors.

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

More repeat visitors from Europe were “very satisfied” with Hawaii’s golf courses and airports than first time visitors (TABLE 3.12).

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	74.2%	22.6%	2.3%	0.9%
Restaurants	59.7%	35.7%	4.2%	0.5%
Shopping	61.3%	35.4%	3.0%	0.4%
Golf Courses	74.5%	22.0%	3.3%	0.3%
Activities & Attractions	69.4%	28.1%	2.3%	0.2%
Transportation	56.2%	34.2%	6.7%	2.9%
Airports	56.2%	38.5%	4.5%	0.7%
Parks & Beaches	72.5%	24.1%	2.9%	0.5%

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	73.9%	22.9%	2.2%	1.0%
Restaurants	58.9%	36.7%	3.9%	0.4%
Shopping	61.3%	35.4%	3.0%	0.3%
Golf Courses	73.7%	22.5%	3.6%	0.2%
Activities & Attractions	68.2%	29.7%	1.9%	0.2%
Transportation	54.3%	34.4%	8.3%	3.0%
Airports	55.4%	39.4%	4.4%	0.8%
Parks & Beaches	71.3%	25.0%	3.3%	0.4%

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	74.8%	22.1%	2.4%	0.7%
Restaurants	60.9%	34.1%	4.6%	0.5%
Shopping	61.2%	35.5%	2.9%	0.4%
Golf Courses	76.0%	21.0%	2.6%	0.3%
Activities & Attractions	71.1%	25.9%	2.8%	0.1%
Transportation	58.5%	33.9%	5.0%	2.7%
Airports	57.5%	37.2%	4.7%	0.6%
Parks & Beaches	74.2%	22.8%	2.4%	0.7%

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	41.4%	48.5%	9.0%	1.1%
Restaurants	19.3%	59.3%	19.8%	1.6%
Shopping	40.7%	50.6%	8.2%	0.5%
Golf Courses	41.1%	46.8%	11.2%	0.9%
Activities & Attractions	33.5%	55.2%	10.7%	0.5%
Transportation	34.6%	49.0%	14.7%	1.8%
Airports	17.0%	62.2%	19.4%	1.4%
Parks & Beaches	48.0%	46.4%	5.0%	0.5%

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	70.3%	25.7%	3.0%	1.1%
Restaurants	53.7%	41.8%	4.4%	0.1%
Shopping	54.7%	40.9%	4.2%	0.2%
Golf Courses	57.2%	37.8%	4.1%	0.8%
Activities & Attractions	63.4%	33.7%	2.8%	0.1%
Transportation	58.5%	33.1%	6.0%	2.4%
Airports	49.5%	44.2%	5.5%	0.8%
Parks & Beaches	69.4%	27.6%	2.7%	0.3%

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

Category	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied at All
Accommodations	63.8%	31.0%	4.0%	1.3%
Restaurants	46.3%	45.4%	7.4%	0.8%
Shopping	57.4%	38.0%	4.1%	0.5%
Golf Courses	67.9%	27.9%	3.4%	0.9%
Activities & Attractions	54.8%	41.2%	3.8%	0.2%
Transportation	51.4%	39.5%	6.9%	2.2%
Airports	45.0%	47.0%	7.1%	0.9%
Parks & Beaches	71.2%	25.7%	2.5%	0.6%

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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	73.4%	75.2%	62.2%	73.9%	79.9%	71.8%	75.5%
Somewhat satisfied	25.6%	22.3%	32.2%	23.0%	17.6%	24.5%	21.7%
Somewhat dissatisfied	0.6%	1.3%	4.4%	2.2%	2.2%	3.1%	1.9%
Not satisfied at all	0.4%	1.1%	1.3%	0.9%	0.4%	0.7%	1.0%
<b>Restaurants</b>							
Very satisfied	55.6%	56.2%	51.5%	60.0%	66.3%	56.0%	61.5%
Somewhat satisfied	40.9%	38.1%	42.4%	35.1%	30.6%	38.3%	34.3%
Somewhat dissatisfied	2.8%	5.3%	5.3%	4.4%	2.9%	5.4%	3.6%
Not satisfied at all	0.7%	0.5%	0.9%	0.5%	0.2%	0.3%	0.5%
<b>Shopping</b>							
Very satisfied	58.9%	59.8%	54.8%	62.8%	63.3%	63.0%	60.4%
Somewhat satisfied	38.4%	35.9%	42.2%	33.9%	34.3%	33.5%	36.4%
Somewhat dissatisfied	2.7%	3.9%	2.8%	3.1%	2.1%	3.2%	2.8%
Not satisfied at all	0.0%	0.4%	0.2%	0.2%	0.4%	0.3%	0.4%
<b>Golf Courses</b>							
Very satisfied	61.8%	78.4%	74.5%	74.1%	72.2%	72.0%	75.1%
Somewhat satisfied	31.7%	18.9%	21.5%	21.8%	25.1%	23.4%	21.6%
Somewhat dissatisfied	6.6%	2.6%	4.0%	3.2%	2.7%	4.5%	2.9%
Not satisfied at all	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.3%
<b>Activities &amp; Attractions</b>							
Very satisfied	75.3%	68.3%	72.1%	69.3%	68.0%	73.8%	67.0%
Somewhat satisfied	23.3%	28.5%	25.2%	28.5%	30.0%	24.1%	30.3%
Somewhat dissatisfied	1.4%	3.1%	1.9%	2.2%	1.9%	2.1%	2.4%
Not satisfied at all	0.0%	0.0%	0.8%	0.0%	0.1%	0.1%	0.2%
<b>Transportation</b>							
Very satisfied	47.7%	52.5%	51.8%	55.9%	60.3%	57.5%	55.4%
Somewhat satisfied	34.0%	35.4%	37.5%	36.1%	31.2%	33.2%	34.8%
Somewhat dissatisfied	12.6%	9.9%	7.9%	5.5%	5.1%	6.5%	6.9%
Not satisfied at all	5.6%	2.2%	2.9%	2.4%	3.5%	2.8%	2.9%
<b>Airports</b>							
Very satisfied	46.5%	51.8%	54.4%	55.7%	61.1%	56.2%	56.2%
Somewhat satisfied	47.9%	41.9%	40.3%	39.7%	33.7%	38.5%	38.6%
Somewhat dissatisfied	5.2%	5.2%	4.1%	4.2%	4.7%	5.0%	4.2%
Not satisfied at all	0.4%	1.1%	1.2%	0.4%	0.5%	0.3%	0.9%
<b>Parks &amp; Beaches</b>							
Very satisfied	77.1%	70.4%	76.0%	71.9%	70.8%	76.3%	70.4%
Somewhat satisfied	19.7%	26.3%	20.5%	24.4%	25.9%	20.3%	26.1%
Somewhat dissatisfied	3.3%	2.5%	3.1%	3.1%	3.0%	2.9%	2.9%
Not satisfied at all	0.0%	0.8%	0.4%	0.6%	0.4%	0.5%	0.5%

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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	75.6%	77.2%	59.5%	72.7%	79.7%	70.3%	74.9%
Somewhat satisfied	24.4%	20.5%	34.4%	24.9%	17.3%	25.9%	22.1%
Somewhat dissatisfied	0.0%	1.3%	4.0%	1.6%	2.5%	3.2%	1.9%
Not satisfied at all	0.0%	0.9%	2.1%	0.8%	0.5%	0.6%	1.1%
<b>Restaurants</b>							
Very satisfied	53.6%	57.7%	50.2%	59.0%	64.6%	56.1%	59.7%
Somewhat satisfied	44.7%	37.4%	45.4%	35.9%	31.8%	38.1%	36.3%
Somewhat dissatisfied	0.0%	4.6%	3.5%	4.6%	3.6%	5.5%	3.5%
Not satisfied at all	1.7%	0.3%	1.0%	0.6%	0.0%	0.3%	0.5%
<b>Shopping</b>							
Very satisfied	58.1%	60.0%	58.2%	62.4%	62.1%	65.2%	60.1%
Somewhat satisfied	39.7%	35.0%	38.7%	34.5%	36.1%	32.1%	36.4%
Somewhat dissatisfied	2.3%	4.5%	2.7%	2.9%	1.8%	2.7%	3.1%
Not satisfied at all	0.0%	0.6%	0.4%	0.2%	0.0%	0.0%	0.4%
<b>Golf Courses</b>							
Very satisfied	61.6%	77.1%	73.8%	73.5%	70.9%	80.8%	72.5%
Somewhat satisfied	25.1%	19.2%	26.2%	21.7%	26.8%	14.3%	23.9%
Somewhat dissatisfied	13.3%	3.8%	0.0%	4.0%	2.3%	4.9%	3.4%
Not satisfied at all	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.3%
<b>Activities &amp; Attractions</b>							
Very satisfied	76.0%	68.7%	73.5%	69.1%	63.2%	77.8%	65.1%
Somewhat satisfied	20.6%	29.2%	24.5%	28.9%	35.0%	21.7%	32.2%
Somewhat dissatisfied	3.4%	2.1%	1.4%	2.0%	1.5%	0.5%	2.4%
Not satisfied at all	0.0%	0.0%	0.6%	0.0%	0.3%	0.0%	0.3%
<b>Transportation</b>							
Very satisfied	33.8%	55.7%	55.5%	51.5%	56.5%	55.7%	53.7%
Somewhat satisfied	53.3%	33.5%	32.0%	38.1%	30.8%	33.0%	35.0%
Somewhat dissatisfied	12.9%	9.8%	9.7%	7.3%	7.3%	8.5%	8.2%
Not satisfied at all	0.0%	1.1%	2.7%	3.1%	5.3%	2.8%	3.1%
<b>Airports</b>							
Very satisfied	44.7%	52.5%	54.1%	53.9%	59.8%	56.6%	55.0%
Somewhat satisfied	49.6%	41.2%	42.1%	41.1%	34.7%	39.5%	39.4%
Somewhat dissatisfied	5.8%	4.8%	3.3%	4.4%	4.9%	3.8%	4.6%
Not satisfied at all	0.0%	1.5%	0.5%	0.6%	0.6%	0.1%	1.0%
<b>Parks &amp; Beaches</b>							
Very satisfied	73.8%	71.7%	76.3%	71.1%	66.9%	77.8%	69.2%
Somewhat satisfied	25.1%	25.4%	21.2%	25.2%	27.6%	18.7%	27.0%
Somewhat dissatisfied	1.1%	2.5%	2.6%	3.3%	4.7%	3.1%	3.3%
Not satisfied at all	0.0%	0.3%	0.0%	0.4%	0.7%	0.4%	0.5%

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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	71.9%	71.2%	66.3%	75.7%	80.1%	72.8%	76.8%
Somewhat satisfied	26.3%	25.8%	28.8%	20.2%	17.9%	23.5%	20.7%
Somewhat dissatisfied	1.0%	1.3%	4.9%	3.2%	1.8%	3.0%	1.8%
Not satisfied at all	0.7%	1.6%	0.0%	0.9%	0.3%	0.7%	0.7%
<b>Restaurants</b>							
Very satisfied	56.9%	53.1%	53.6%	61.5%	68.6%	55.9%	65.7%
Somewhat satisfied	38.3%	39.4%	37.7%	33.8%	28.9%	38.5%	29.8%
Somewhat dissatisfied	4.7%	6.6%	8.0%	4.3%	2.1%	5.3%	3.8%
Not satisfied at all	0.0%	0.9%	0.7%	0.4%	0.4%	0.2%	0.7%
<b>Shopping</b>							
Very satisfied	59.5%	59.5%	49.6%	63.3%	64.8%	61.4%	61.1%
Somewhat satisfied	37.5%	37.7%	47.5%	33.1%	31.9%	34.5%	36.4%
Somewhat dissatisfied	3.1%	2.8%	3.0%	3.4%	2.4%	3.5%	2.3%
Not satisfied at all	0.0%	0.0%	0.0%	0.2%	0.9%	0.6%	0.2%
<b>Golf Courses</b>							
Very satisfied	62.0%	81.6%	75.5%	75.2%	74.7%	64.4%	81.3%
Somewhat satisfied	38.0%	18.4%	15.0%	22.0%	21.9%	31.5%	16.3%
Somewhat dissatisfied	0.0%	0.0%	9.5%	1.6%	3.5%	4.2%	1.9%
Not satisfied at all	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.5%
<b>Activities &amp; Attractions</b>							
Very satisfied	74.9%	67.6%	70.2%	69.5%	73.7%	71.1%	71.2%
Somewhat satisfied	25.1%	27.1%	26.2%	27.9%	23.8%	25.7%	26.2%
Somewhat dissatisfied	0.0%	5.2%	2.6%	2.5%	2.4%	3.1%	2.4%
Not satisfied at all	0.0%	0.0%	1.1%	0.0%	0.0%	0.1%	0.2%
<b>Transportation</b>							
Very satisfied	54.7%	47.1%	46.9%	61.6%	63.4%	58.6%	58.3%
Somewhat satisfied	24.4%	38.7%	44.5%	33.6%	31.4%	33.4%	34.4%
Somewhat dissatisfied	12.5%	10.0%	5.5%	3.2%	3.1%	5.2%	4.7%
Not satisfied at all	8.4%	4.2%	3.1%	1.6%	2.0%	2.7%	2.6%
<b>Airports</b>							
Very satisfied	47.7%	50.5%	54.9%	58.4%	62.7%	55.9%	59.1%
Somewhat satisfied	46.8%	43.3%	37.6%	37.5%	32.4%	37.8%	36.7%
Somewhat dissatisfied	4.8%	5.9%	5.3%	4.0%	4.5%	5.9%	3.5%
Not satisfied at all	0.7%	0.3%	2.1%	0.2%	0.4%	0.5%	0.7%
<b>Parks &amp; Beaches</b>							
Very satisfied	79.4%	67.8%	75.7%	73.1%	75.7%	75.2%	73.1%
Somewhat satisfied	15.9%	28.2%	19.6%	23.2%	23.6%	21.5%	24.1%
Somewhat dissatisfied	4.8%	2.3%	3.8%	3.0%	0.7%	2.6%	2.1%
Not satisfied at all	0.0%	1.7%	0.9%	0.8%	0.0%	0.7%	0.6%



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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	54.8%	41.6%	37.8%	35.0%	41.3%	42.5%	40.5%
Somewhat satisfied	40.4%	50.5%	49.0%	51.2%	48.0%	48.7%	48.3%
Somewhat dissatisfied	4.3%	6.7%	11.8%	12.2%	10.2%	7.7%	10.1%
Not satisfied at all	0.5%	1.2%	1.3%	1.7%	0.5%	1.2%	1.1%
<b>Restaurants</b>							
Very satisfied	21.4%	17.6%	23.5%	17.6%	18.8%	16.9%	21.3%
Somewhat satisfied	56.2%	64.0%	56.0%	59.8%	56.7%	60.2%	58.7%
Somewhat dissatisfied	19.7%	17.6%	17.6%	20.9%	23.2%	21.1%	18.6%
Not satisfied at all	2.7%	0.8%	2.8%	1.7%	1.3%	1.8%	1.4%
<b>Shopping</b>							
Very satisfied	52.6%	38.0%	53.3%	38.5%	29.9%	41.9%	39.8%
Somewhat satisfied	41.3%	53.9%	41.6%	51.4%	57.5%	49.8%	51.3%
Somewhat dissatisfied	6.1%	7.8%	4.7%	9.4%	11.6%	7.9%	8.3%
Not satisfied at all	0.0%	0.2%	0.4%	0.8%	1.0%	0.4%	0.6%
<b>Golf Courses</b>							
Very satisfied	55.2%	36.9%	47.1%	40.6%	39.5%	43.2%	40.4%
Somewhat satisfied	32.6%	49.4%	30.9%	48.7%	50.8%	41.6%	48.6%
Somewhat dissatisfied	7.8%	13.7%	21.9%	10.7%	8.0%	14.0%	10.3%
Not satisfied at all	4.4%	0.0%	0.0%	0.0%	1.7%	1.2%	0.8%
<b>Activities &amp; Attractions</b>							
Very satisfied	43.2%	30.4%	45.8%	29.7%	25.9%	37.5%	30.0%
Somewhat satisfied	49.5%	59.3%	46.5%	57.3%	58.2%	53.2%	57.0%
Somewhat dissatisfied	7.3%	10.0%	7.1%	12.2%	15.3%	8.9%	12.3%
Not satisfied at all	0.0%	0.3%	0.6%	0.8%	0.6%	0.3%	0.6%
<b>Transportation</b>							
Very satisfied	43.4%	32.1%	33.1%	31.9%	36.1%	37.9%	31.8%
Somewhat satisfied	46.7%	49.7%	49.1%	48.4%	50.5%	48.7%	49.2%
Somewhat dissatisfied	9.0%	15.9%	15.8%	18.1%	11.8%	12.2%	16.7%
Not satisfied at all	0.9%	2.2%	2.1%	1.5%	1.6%	1.2%	2.3%
<b>Airports</b>							
Very satisfied	23.9%	15.3%	17.7%	15.3%	15.4%	17.9%	16.2%
Somewhat satisfied	59.0%	62.8%	64.6%	61.8%	61.7%	62.3%	62.2%
Somewhat dissatisfied	16.8%	20.5%	15.9%	20.8%	21.9%	18.7%	20.1%
Not satisfied at all	0.2%	1.4%	1.7%	2.1%	1.0%	1.1%	1.6%
<b>Parks &amp; Beaches</b>							
Very satisfied	53.7%	47.3%	55.7%	44.1%	43.6%	51.7%	45.0%
Somewhat satisfied	43.5%	45.9%	38.6%	51.0%	50.2%	43.8%	48.6%
Somewhat dissatisfied	2.8%	6.2%	4.9%	4.0%	5.8%	4.1%	5.8%
Not satisfied at all	0.0%	0.5%	0.8%	0.8%	0.3%	0.4%	0.5%

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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	67.1%	70.4%	64.7%	67.9%	76.1%	67.4%	72.5%
Somewhat satisfied	28.8%	25.6%	31.3%	27.7%	19.7%	28.1%	23.8%
Somewhat dissatisfied	4.0%	2.0%	3.1%	2.9%	3.9%	3.6%	2.5%
Not satisfied at all	0.0%	2.0%	0.8%	1.5%	0.3%	0.9%	1.2%
<b>Restaurants</b>							
Very satisfied	47.8%	52.4%	55.9%	53.0%	55.0%	55.1%	52.8%
Somewhat satisfied	45.4%	41.6%	41.2%	43.4%	39.9%	40.4%	42.8%
Somewhat dissatisfied	6.8%	5.6%	2.9%	3.4%	5.1%	4.6%	4.3%
Not satisfied at all	0.0%	0.3%	0.0%	0.2%	0.0%	0.0%	0.2%
<b>Shopping</b>							
Very satisfied	54.2%	53.2%	49.5%	51.6%	59.7%	52.8%	56.0%
Somewhat satisfied	37.0%	43.9%	43.1%	43.5%	37.0%	42.7%	39.6%
Somewhat dissatisfied	8.9%	2.6%	7.4%	4.7%	2.8%	4.3%	4.2%
Not satisfied at all	0.0%	0.2%	0.0%	0.2%	0.4%	0.2%	0.3%
<b>Golf Courses</b>							
Very satisfied	41.7%	56.8%	76.6%	52.8%	58.8%	58.3%	56.6%
Somewhat satisfied	58.3%	34.2%	19.2%	43.4%	39.3%	35.5%	39.2%
Somewhat dissatisfied	0.0%	8.1%	4.1%	2.7%	0.7%	4.6%	3.9%
Not satisfied at all	0.0%	0.9%	0.0%	1.1%	1.1%	1.6%	0.4%
<b>Activities &amp; Attractions</b>							
Very satisfied	66.9%	68.5%	67.1%	58.2%	60.7%	68.1%	59.7%
Somewhat satisfied	29.3%	28.9%	31.9%	37.6%	36.4%	28.9%	37.5%
Somewhat dissatisfied	3.8%	2.3%	1.0%	4.1%	2.8%	2.8%	2.7%
Not satisfied at all	0.0%	0.3%	0.0%	0.0%	0.0%	0.2%	0.0%
<b>Transportation</b>							
Very satisfied	49.9%	60.0%	51.2%	51.7%	69.1%	53.7%	62.3%
Somewhat satisfied	40.3%	29.6%	35.6%	39.1%	26.0%	38.8%	28.5%
Somewhat dissatisfied	5.5%	8.3%	10.7%	6.0%	3.4%	4.5%	7.3%
Not satisfied at all	4.3%	2.1%	2.5%	3.2%	1.4%	3.0%	1.9%
<b>Airports</b>							
Very satisfied	45.9%	52.0%	39.2%	50.3%	53.1%	46.7%	51.5%
Somewhat satisfied	45.7%	41.9%	52.3%	42.1%	42.9%	48.7%	40.9%
Somewhat dissatisfied	6.9%	5.1%	8.1%	6.7%	3.7%	4.1%	6.5%
Not satisfied at all	1.5%	1.1%	0.4%	0.9%	0.4%	0.5%	1.1%
<b>Parks &amp; Beaches</b>							
Very satisfied	79.2%	68.6%	74.2%	64.9%	69.7%	71.4%	67.9%
Somewhat satisfied	17.7%	29.7%	21.8%	31.1%	27.4%	26.1%	28.7%
Somewhat dissatisfied	3.1%	1.7%	4.0%	3.2%	2.3%	2.5%	2.7%
Not satisfied at all	0.0%	0.0%	0.0%	0.7%	0.5%	0.0%	0.6%

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

Category	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Accommodations</b>							
Very satisfied	71.6%	65.6%	59.7%	60.5%	68.3%	63.5%	64.7%
Somewhat satisfied	26.5%	29.1%	35.4%	33.9%	25.5%	30.9%	31.2%
Somewhat dissatisfied	1.2%	2.6%	4.2%	4.9%	4.2%	4.3%	3.2%
Not satisfied at all	0.7%	2.7%	0.7%	0.7%	2.0%	1.4%	0.9%
<b>Restaurants</b>							
Very satisfied	50.4%	45.5%	44.1%	44.9%	48.1%	47.5%	43.2%
Somewhat satisfied	40.9%	43.5%	46.4%	47.3%	44.7%	44.3%	48.2%
Somewhat dissatisfied	8.1%	9.4%	7.9%	7.3%	6.8%	7.3%	7.9%
Not satisfied at all	0.6%	1.6%	1.6%	0.5%	0.4%	0.9%	0.8%
<b>Shopping</b>							
Very satisfied	57.9%	54.9%	55.4%	55.2%	62.3%	57.6%	57.0%
Somewhat satisfied	36.2%	39.4%	38.1%	41.0%	34.4%	38.1%	37.6%
Somewhat dissatisfied	5.3%	4.9%	6.1%	3.3%	2.7%	3.9%	4.5%
Not satisfied at all	0.6%	0.8%	0.4%	0.5%	0.6%	0.4%	0.9%
<b>Golf Courses</b>							
Very satisfied	76.9%	65.9%	55.3%	64.0%	75.9%	66.8%	69.7%
Somewhat satisfied	14.7%	29.9%	37.5%	31.6%	24.1%	28.9%	26.1%
Somewhat dissatisfied	4.0%	4.1%	5.3%	4.4%	0.0%	3.7%	2.7%
Not satisfied at all	4.4%	0.0%	1.9%	0.0%	0.0%	0.5%	1.5%
<b>Activities &amp; Attractions</b>							
Very satisfied	63.8%	56.8%	59.4%	52.4%	49.4%	54.8%	54.7%
Somewhat satisfied	34.4%	37.9%	37.2%	42.5%	47.3%	41.3%	40.9%
Somewhat dissatisfied	1.8%	4.8%	2.8%	5.0%	3.2%	3.7%	4.2%
Not satisfied at all	0.0%	0.5%	0.5%	0.1%	0.0%	0.2%	0.2%
<b>Transportation</b>							
Very satisfied	53.7%	49.8%	39.2%	48.6%	63.7%	51.9%	49.9%
Somewhat satisfied	39.8%	38.3%	48.9%	41.2%	31.3%	39.8%	38.5%
Somewhat dissatisfied	4.4%	8.7%	7.6%	8.6%	3.8%	6.1%	9.4%
Not satisfied at all	2.2%	3.1%	4.2%	1.6%	1.2%	2.2%	2.2%
<b>Airports</b>							
Very satisfied	40.2%	48.3%	40.9%	43.8%	51.0%	43.1%	49.8%
Somewhat satisfied	52.6%	40.2%	48.3%	49.3%	43.0%	49.4%	41.0%
Somewhat dissatisfied	6.9%	10.4%	8.9%	6.3%	5.5%	6.6%	8.6%
Not satisfied at all	0.3%	1.1%	1.9%	0.7%	0.5%	1.0%	0.6%
<b>Parks &amp; Beaches</b>							
Very satisfied	75.8%	75.3%	72.3%	68.1%	70.8%	71.4%	70.7%
Somewhat satisfied	21.8%	19.8%	23.7%	28.8%	27.8%	25.5%	26.4%
Somewhat dissatisfied	1.9%	4.9%	3.3%	2.2%	1.0%	2.6%	2.3%
Not satisfied at all	0.5%	0.0%	0.7%	0.9%	0.3%	0.5%	0.6%

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

Category	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Not satisfied at all
<b>Accommodations</b>				
Overall	74.2%	22.6%	2.3%	0.9%
Location	76.8%	20.1%	2.3%	0.8%
Service	69.9%	24.4%	4.7%	1.1%
Facility	68.2%	25.7%	5.0%	1.0%
Cleanliness & comfort	70.8%	23.6%	4.4%	1.2%
Price	57.1%	33.8%	7.3%	1.8%
<b>Restaurants</b>				
Overall	59.7%	35.7%	4.2%	0.5%
Location	63.1%	32.2%	4.5%	0.3%
Variety of choices	60.0%	33.2%	6.0%	0.8%
Service	58.9%	35.4%	4.9%	0.7%
Quality & taste of food	59.6%	34.2%	5.5%	0.7%
Value for the money	31.8%	48.8%	16.4%	2.9%
<b>Shopping</b>				
Overall	61.3%	35.4%	3.0%	0.4%
Sufficient shopping places	67.6%	28.4%	3.6%	0.4%
Location	63.9%	31.7%	3.8%	0.6%
Variety of merchandise	55.7%	36.6%	7.1%	0.6%
Service	59.3%	36.5%	3.8%	0.4%
Quality of merchandise	52.8%	41.6%	4.9%	0.6%
Price	36.2%	49.1%	12.8%	2.0%
<b>Golf courses</b>				
Overall	74.5%	22.0%	3.3%	0.3%
Location	75.8%	22.2%	1.9%	0.1%
Service	69.0%	26.7%	3.7%	0.6%
Price	39.0%	39.9%	16.9%	4.2%
<b>Activities &amp; Attractions</b>				
Overall	69.4%	28.1%	2.3%	0.2%
Excitement	66.3%	30.4%	3.0%	0.3%
Variety of choices	68.9%	27.5%	3.4%	0.3%
Service	65.3%	30.8%	3.5%	0.4%
Value for the money	41.7%	44.1%	12.6%	1.6%
<b>Transportation</b>				
Overall	56.2%	34.2%	6.7%	2.9%
Convenience	56.8%	32.3%	8.7%	2.2%
Cleanliness & comfort	56.0%	37.0%	5.6%	1.4%
Efficiency	54.0%	34.6%	8.7%	2.7%
Price	51.5%	36.1%	9.3%	3.1%
<b>Airports</b>				
Overall	56.2%	38.5%	4.5%	0.7%
Signage	57.0%	36.4%	5.5%	1.1%
Cleanliness & comfort	58.7%	35.0%	5.2%	1.0%
Ease of getting around	56.4%	33.0%	8.7%	1.9%
Availability of food	38.0%	38.8%	18.6%	4.6%
Availability of shopping	41.6%	42.1%	13.7%	2.7%
Friendliness of workers	57.1%	34.5%	6.1%	2.3%
<b>Parks &amp; Beaches</b>				
Overall	72.5%	24.1%	2.9%	0.5%
Security	58.4%	34.0%	6.1%	1.5%
Facility	61.5%	32.5%	4.8%	1.2%
Cleanliness & comfort	63.3%	29.0%	6.2%	1.5%

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

Category	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Not satisfied at all
<b>Accommodations</b>				
Overall	73.9%	22.9%	2.2%	1.0%
Location	76.6%	20.2%	2.1%	1.0%
Service	68.1%	25.9%	4.8%	1.1%
Facility	66.3%	27.2%	5.3%	1.1%
Cleanliness & comfort	68.7%	25.4%	4.3%	1.6%
Price	56.6%	34.4%	7.2%	1.7%
<b>Restaurants</b>				
Overall	58.9%	36.7%	3.9%	0.4%
Location	62.3%	32.9%	4.6%	0.2%
Variety of choices	59.0%	34.2%	5.9%	1.0%
Service	57.8%	36.4%	5.1%	0.7%
Quality & taste of food	59.3%	35.0%	5.1%	0.6%
Value for the money	30.9%	50.1%	16.6%	2.3%
<b>Shopping</b>				
Overall	61.3%	35.4%	3.0%	0.3%
Sufficient shopping places	66.7%	28.8%	4.0%	0.5%
Location	62.7%	32.7%	3.8%	0.8%
Variety of merchandise	54.2%	37.7%	7.6%	0.5%
Service	57.7%	38.0%	4.0%	0.3%
Quality of merchandise	51.5%	42.8%	5.1%	0.6%
Price	35.0%	50.2%	12.5%	2.3%
<b>Golf courses</b>				
Overall	73.7%	22.5%	3.6%	0.2%
Location	75.6%	23.0%	1.5%	0.0%
Service	67.0%	27.8%	4.4%	0.7%
Price	38.6%	38.6%	18.2%	4.6%
<b>Activities &amp; Attractions</b>				
Overall	68.2%	29.7%	1.9%	0.2%
Excitement	64.4%	32.4%	2.8%	0.4%
Variety of choices	67.6%	28.5%	3.6%	0.3%
Service	63.1%	33.0%	3.5%	0.4%
Value for the money	39.8%	45.7%	12.8%	1.7%
<b>Transportation</b>				
Overall	54.3%	34.4%	8.3%	3.0%
Convenience	54.0%	33.9%	9.6%	2.6%
Cleanliness & comfort	52.3%	39.3%	6.5%	2.0%
Efficiency	52.0%	35.6%	9.4%	3.0%
Price	49.5%	37.6%	9.6%	3.3%
<b>Airports</b>				
Overall	55.4%	39.4%	4.4%	0.8%
Signage	55.9%	36.9%	6.0%	1.1%
Cleanliness & comfort	58.7%	35.1%	5.2%	1.1%
Ease of getting around	56.1%	32.3%	9.7%	1.9%
Availability of food	36.8%	38.5%	19.7%	5.0%
Availability of shopping	40.3%	42.4%	14.8%	2.5%
Friendliness of workers	54.6%	36.7%	6.4%	2.3%
<b>Parks &amp; Beaches</b>				
Overall	71.3%	25.0%	3.3%	0.4%
Security	55.8%	35.6%	6.9%	1.6%
Facility	60.3%	33.8%	5.0%	0.8%
Cleanliness & comfort	61.9%	30.4%	6.5%	1.1%

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

Category	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Not satisfied at all
<b>Accommodations</b>				
Overall	74.8%	22.1%	2.4%	0.7%
Location	77.0%	19.9%	2.5%	0.6%
Service	72.6%	22.1%	4.4%	1.0%
Facility	71.1%	23.5%	4.6%	0.8%
Cleanliness & comfort	74.1%	20.8%	4.5%	0.7%
Price	57.7%	32.9%	7.5%	1.9%
<b>Restaurants</b>				
Overall	60.9%	34.1%	4.6%	0.5%
Location	64.2%	31.0%	4.4%	0.4%
Variety of choices	61.5%	31.8%	6.2%	0.5%
Service	60.7%	34.0%	4.6%	0.7%
Quality & taste of food	60.0%	32.9%	6.3%	0.8%
Value for the money	33.3%	46.8%	16.2%	3.7%
<b>Shopping</b>				
Overall	61.2%	35.5%	2.9%	0.4%
Sufficient shopping places	69.0%	27.9%	2.8%	0.3%
Location	65.7%	30.2%	3.8%	0.3%
Variety of merchandise	58.0%	35.0%	6.3%	0.7%
Service	61.6%	34.3%	3.6%	0.5%
Quality of merchandise	54.8%	39.9%	4.7%	0.6%
Price	37.9%	47.3%	13.2%	1.6%
<b>Golf courses</b>				
Overall	76.0%	21.0%	2.6%	0.3%
Location	76.3%	20.7%	2.6%	0.4%
Service	72.7%	24.7%	2.2%	0.5%
Price	39.7%	42.5%	14.4%	3.5%
<b>Activities &amp; Attractions</b>				
Overall	71.1%	25.9%	2.8%	0.1%
Excitement	68.9%	27.6%	3.2%	0.3%
Variety of choices	70.6%	26.0%	3.2%	0.2%
Service	68.4%	27.8%	3.4%	0.4%
Value for the money	44.3%	41.8%	12.3%	1.6%
<b>Transportation</b>				
Overall	58.5%	33.9%	5.0%	2.7%
Convenience	60.1%	30.4%	7.8%	1.8%
Cleanliness & comfort	60.3%	34.4%	4.6%	0.8%
Efficiency	56.2%	33.4%	8.0%	2.5%
Price	53.8%	34.4%	9.0%	2.8%
<b>Airports</b>				
Overall	57.5%	37.2%	4.7%	0.6%
Signage	58.5%	35.8%	4.6%	1.1%
Cleanliness & comfort	58.9%	34.9%	5.3%	0.9%
Ease of getting around	56.8%	34.1%	7.3%	1.7%
Availability of food	39.8%	39.4%	16.9%	3.9%
Availability of shopping	43.4%	41.6%	12.0%	3.0%
Friendliness of workers	60.9%	31.2%	5.6%	2.3%
<b>Parks &amp; Beaches</b>				
Overall	74.2%	22.8%	2.4%	0.7%
Security	62.2%	31.6%	5.0%	1.2%
Facility	63.3%	30.5%	4.5%	1.8%
Cleanliness & comfort	65.5%	26.9%	5.6%	1.9%

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

Category	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Not satisfied at all
<b>Accommodations</b>				
Overall	41.4%	48.5%	9.0%	1.1%
Location	49.3%	37.6%	11.1%	2.0%
Service	26.6%	53.0%	18.1%	2.4%
Facility	26.4%	49.4%	20.4%	3.8%
Cleanliness & comfort	36.0%	47.7%	13.5%	2.8%
Price	32.0%	50.7%	15.1%	2.2%
<b>Restaurants</b>				
Overall	19.3%	59.3%	19.8%	1.6%
Location	27.1%	58.1%	13.8%	1.0%
Variety of choices	23.1%	51.3%	23.3%	2.3%
Service	19.1%	57.8%	20.9%	2.2%
Quality & taste of food	16.4%	47.3%	29.9%	6.4%
Value for the money	13.6%	47.4%	32.4%	6.5%
<b>Shopping</b>				
Overall	40.7%	50.6%	8.2%	0.5%
Sufficient shopping places	56.0%	37.4%	6.3%	0.3%
Location	39.2%	51.0%	9.5%	0.4%
Variety of merchandise	40.6%	45.9%	12.7%	0.8%
Service	26.0%	56.8%	15.8%	1.4%
Quality of merchandise	25.8%	60.1%	13.2%	0.8%
Price	23.3%	54.6%	20.1%	2.0%
<b>Golf courses</b>				
Overall	41.1%	46.8%	11.2%	0.9%
Location	51.5%	39.3%	9.0%	0.2%
Service	26.5%	46.2%	24.6%	2.7%
Price	20.4%	41.4%	31.5%	6.7%
<b>Activities &amp; Attractions</b>				
Overall	33.5%	55.2%	10.7%	0.5%
Excitement	37.6%	51.8%	10.3%	0.3%
Variety of choices	31.5%	50.4%	17.5%	0.6%
Service	25.8%	55.4%	17.7%	1.2%
Value for the money	20.1%	48.9%	27.3%	3.7%
<b>Transportation</b>				
Overall	34.6%	49.0%	14.7%	1.8%
Convenience	35.4%	45.7%	16.4%	2.6%
Cleanliness & comfort	25.7%	53.1%	19.2%	2.0%
Efficiency	25.5%	46.2%	23.9%	4.4%
Price	33.6%	50.2%	14.0%	2.1%
<b>Airports</b>				
Overall	17.0%	62.2%	19.4%	1.4%
Signage	19.6%	60.0%	18.8%	1.6%
Cleanliness & comfort	20.5%	57.4%	20.0%	2.1%
Ease of getting around	14.5%	49.3%	31.4%	4.8%
Availability of food	7.6%	35.5%	47.9%	9.0%
Availability of shopping	10.2%	43.1%	39.8%	6.9%
Friendliness of workers	15.3%	57.5%	23.0%	4.2%
<b>Parks &amp; Beaches</b>				
Overall	48.0%	46.4%	5.0%	0.5%
Security	40.5%	49.7%	9.0%	0.8%
Facility	31.2%	53.8%	14.0%	0.9%
Cleanliness & comfort	38.4%	49.0%	11.3%	1.3%

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

<b>Category</b>	<b>Very Satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations</b>				
Overall	70.3%	25.7%	3.0%	1.1%
Location	73.6%	22.9%	2.7%	0.8%
Service	62.2%	31.5%	5.3%	1.0%
Facility	61.4%	30.3%	6.4%	1.9%
Cleanliness & comfort	64.8%	26.9%	6.3%	2.0%
Price	53.6%	33.9%	9.7%	2.9%
<b>Restaurants</b>				
Overall	53.7%	41.8%	4.4%	0.1%
Location	61.2%	33.6%	4.7%	0.5%
Variety of choices	56.2%	38.3%	5.0%	0.6%
Service	58.8%	36.3%	4.2%	0.7%
Quality & taste of food	54.6%	39.6%	5.0%	0.8%
Value for the money	28.4%	49.0%	18.9%	3.7%
<b>Shopping</b>				
Overall	54.7%	40.9%	4.2%	0.2%
Sufficient shopping places	65.0%	30.8%	4.2%	0.0%
Location	61.7%	33.2%	4.1%	1.0%
Variety of merchandise	51.9%	37.5%	9.1%	1.4%
Service	56.7%	39.2%	3.9%	0.3%
Quality of merchandise	46.1%	47.1%	6.5%	0.3%
Price	31.4%	49.6%	16.8%	2.2%
<b>Golf courses</b>				
Overall	57.2%	37.8%	4.1%	0.8%
Location	66.3%	32.4%	0.8%	0.5%
Service	54.0%	39.8%	5.0%	1.2%
Price	31.2%	36.9%	22.8%	9.0%
<b>Activities &amp; Attractions</b>				
Overall	63.4%	33.7%	2.8%	0.1%
Excitement	58.2%	37.3%	4.2%	0.4%
Variety of choices	64.9%	29.8%	5.1%	0.2%
Service	61.3%	35.6%	2.7%	0.3%
Value for the money	34.9%	49.1%	14.1%	1.8%
<b>Transportation</b>				
Overall	58.5%	33.1%	6.0%	2.4%
Convenience	57.5%	33.8%	6.1%	2.5%
Cleanliness & comfort	59.4%	34.4%	4.9%	1.3%
Efficiency	54.3%	35.7%	7.4%	2.6%
Price	50.5%	37.7%	9.1%	2.7%
<b>Airports</b>				
Overall	49.5%	44.2%	5.5%	0.8%
Signage	52.2%	38.7%	7.9%	1.3%
Cleanliness & comfort	53.6%	39.8%	6.1%	0.5%
Ease of getting around	50.8%	39.5%	8.2%	1.6%
Availability of food	28.3%	42.8%	22.4%	6.4%
Availability of shopping	31.2%	42.7%	20.6%	5.5%
Friendliness of workers	53.7%	38.3%	6.3%	1.6%
<b>Parks &amp; Beaches</b>				
Overall	69.4%	27.6%	2.7%	0.3%
Security	54.9%	39.3%	4.5%	1.3%
Facility	58.3%	34.6%	6.3%	0.8%
Cleanliness & comfort	60.0%	30.6%	7.6%	1.8%



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

Category	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Not satisfied at all
<b>Accommodations</b>				
Overall	63.8%	31.0%	4.0%	1.3%
Location	65.5%	29.2%	4.1%	1.2%
Service	54.7%	37.9%	6.2%	1.2%
Facility	53.9%	38.7%	6.3%	1.1%
Cleanliness & comfort	60.4%	31.5%	7.1%	1.1%
Price	43.1%	42.5%	11.8%	2.6%
<b>Restaurants</b>				
Overall	46.3%	45.4%	7.4%	0.8%
Location	51.7%	39.3%	8.3%	0.7%
Variety of choices	49.1%	38.2%	11.2%	1.5%
Service	50.4%	41.3%	7.4%	1.0%
Quality & taste of food	47.2%	40.3%	10.6%	1.9%
Value for the money	33.6%	45.5%	17.2%	3.6%
<b>Shopping</b>				
Overall	57.4%	38.0%	4.1%	0.5%
Sufficient shopping places	63.7%	31.4%	4.2%	0.6%
Location	58.1%	36.0%	5.4%	0.6%
Variety of merchandise	50.3%	39.4%	9.4%	0.8%
Service	58.1%	38.5%	3.1%	0.3%
Quality of merchandise	46.9%	46.4%	6.2%	0.5%
Price	38.3%	45.6%	13.9%	2.2%
<b>Golf courses</b>				
Overall	67.9%	27.9%	3.4%	0.9%
Location	71.6%	23.8%	3.8%	0.8%
Service	59.4%	36.0%	4.2%	0.3%
Price	34.7%	46.4%	12.2%	6.6%
<b>Activities &amp; Attractions</b>				
Overall	54.8%	41.2%	3.8%	0.2%
Excitement	52.2%	42.6%	4.8%	0.4%
Variety of choices	55.1%	38.1%	6.4%	0.4%
Service	53.9%	40.8%	4.6%	0.7%
Value for the money	37.3%	47.3%	13.9%	1.4%
<b>Transportation</b>				
Overall	51.4%	39.5%	6.9%	2.2%
Convenience	51.1%	39.1%	7.5%	2.3%
Cleanliness & comfort	49.1%	43.6%	6.6%	0.8%
Efficiency	50.2%	38.3%	9.4%	2.1%
Price	50.9%	38.1%	8.6%	2.4%
<b>Airports</b>				
Overall	45.0%	47.0%	7.1%	0.9%
Signage	45.9%	45.3%	7.6%	1.2%
Cleanliness & comfort	48.8%	43.6%	7.0%	0.6%
Ease of getting around	45.0%	45.0%	8.9%	1.1%
Availability of food	25.8%	44.9%	24.1%	5.3%
Availability of shopping	25.5%	45.5%	23.9%	5.1%
Friendliness of workers	50.3%	40.6%	7.4%	1.7%
<b>Parks &amp; Beaches</b>				
Overall	71.2%	25.7%	2.5%	0.6%
Security	61.9%	32.1%	5.2%	0.8%
Facility	60.3%	33.9%	5.2%	0.6%
Cleanliness & comfort	63.3%	30.9%	5.2%	0.7%

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

## EXPERIENCE AND WILLINGNESS TO RECOMMEND/REVISIT

### Satisfaction by Island:

When asked about the overall satisfaction by each island visited, the majority of the 2004 respondents from the U.S., Japan, Canada and Europe said that their experience was either “excellent” or “above average” (TABLE 4.1).

**U.S. Visitors:** All islands received “excellent” ratings from over 53 percent of the U.S. visitors surveyed. Kauai (75.7%) had the highest satisfaction rating from U.S. West respondents while a higher percentage of U.S. East visitors gave Maui (72.8%) “excellent” marks. Oahu received the lowest percentage of “excellent” ratings from U.S. West respondents (53.1%), while Molokai received the lowest “excellent” marks from U.S. East respondents (56.5%)

**Japanese Visitors:** The Big Island (57.7%) led the islands with the highest percentage of “excellent” ratings from Japanese respondents, followed by Oahu (53.4%), Maui (53%), Molokai (49.7%) and Kauai (46.3%). Lanai received “excellent” ratings from only 19.1 percent of respondents who visited this island, however, the majority (80.9%) gave Lanai an “above average” rating.

**Canadian Visitors:** Over half of the Canadians surveyed who went to Maui (69%), Kauai (66.4%), Oahu (58.6%) and/or the Big Island (56.6%) responded that their overall experience was “excellent”.

**European Visitors:** Europeans especially liked Kauai with 72 percent of the respondents giving this island an “excellent” rating. Many of the visitors to Maui (67%), the Big Island (63.1%), Oahu (60.7%) and/or Lanai (54.7%) also gave the highest ratings to their stay on these islands.

### Likelihood to Recommend:

The majority of the U.S. West (88.7%), U.S. East (87.9%), Canadian (84.1%), European (79%) and Japanese (69.3%) visitors surveyed in 2004 would still “very likely” recommend the islands as a vacation place to their friends and relatives (TABLE 4.4 TO 4.10).

**U.S. West Visitors:** Family visitors had the highest response rate of “very likely” to recommend the islands (93.4%) followed by middle age, young and senior visitors surveyed at close to 87 percent. Wedding/honeymoon visitors had the lowest percentage of “very likely” to recommend Hawaii among the visitor groups at 82.6 percent. More repeat visitors (89.8%) than first time visitors (85%) surveyed said that they would “very likely” recommend Hawaii.

**U.S. East Visitors:** The percentages of visitors who would “very likely” suggest Hawaii as a vacation destination were closer among middle age, wedding/honeymoon and seniors visitors at about 90 percent. A higher percentage of repeat visitors were more likely to recommend Hawaii than first time visitors (90.6% vs. 85%, respectively).

**Japanese Visitors:** Wedding/honeymoon visitors (79.6%) had the highest percentage of “very likely” to recommend the islands, followed by younger visitors (76.5%) and families (68.9%). Close to 73 percent of repeat visitors who responded to the survey were “very likely” to recommend the islands as a vacation place compared to 65.2 percent for first time respondents.

**Canadian Visitors:** Over 80 percent of Canadian respondents from all lifestage and lifestyle groups answered that they would “very likely” recommend Hawaii. 86 percent of repeat visitors and 81.7 percent of first time visitors answered that they would “very likely” recommend Hawaii.

**European Visitors:** Similarly, more than 80 percent of wedding/honeymoon visitors, families, young visitors and repeat visitors answered that they would “very likely” recommend the islands.

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

An exceptional 75.2 percent of the U.S. West visitors surveyed in 2004 responded that they would “very likely” return to the islands within the next five years. Over half of the U.S. East and Canadian, 48.9 percent of the Japanese and 35.9 percent of the European visitors answered that they “would likely” return to Hawaii (TABLE 4.11).

The return rate to Hawaii was the lowest among young respondents from the U.S. and among wedding/honeymoon visitors from Japan, Canada and Europe.

**U.S. West Visitors:** Over 66 percent of all lifestage and lifestyle groups from the U.S. West answered that they would “very likely” return to the islands. Close to 80 percent of repeat visitors and 58.9 percent of first timers said that they would “very likely” revisit the state.

Of those who gave reasons why they would not be back to Hawaii, 50.7 percent answered that they “want to go someplace new” and 44.5 percent said it was “too expensive” (TABLES 4.12 & 4.14).

**U.S. East Visitors:** Middle age respondents (55.1%) from the U.S. East posted the highest “very likely to revisit” percentage followed by families and senior visitors. Close to 63 percent of repeat visitors and 36.8 percent of first time visitors would “very likely revisit” Hawaii.

Reasons given by those who would not return were the high costs (50.3%), the desire to go some place new (48.9%) and long flights (36.7%) (TABLES 4.12 & 4.15).

**Japanese Visitors:** With the exception of wedding/honeymoon visitors (32.8%), approximately half of the Japanese respondents from other lifestyle and lifestage indicated that they would “very likely” revisit Hawaii within the next five years. 64 percent of the repeat visitors and 30.6 percent of the first time visitors surveyed would “very likely” return.

Of those who specified why they would not revisit, 58 percent wanted to “go somewhere new” (TABLES 4.12 & 4.16).

**Canadian Visitors:** Similar to Japanese respondents, only 37.8 percent of the wedding/honeymoon visitors from Canada would “very likely” return while nearly 50 percent respondents from other groups said that they would “very likely” come back. The majority of the repeat visitors (63.4%) and 38.4 percent of first time visitors from Canada would “very likely” come back.

The top two reasons why some Canadians will not revisit were that Hawaii is “too expensive” (50.4%) and they want to “go somewhere new” (49.4%). (TABLES 4.12 & 4.17).

**European Visitors:** The likelihood of returning to Hawaii for European visitors surveyed was much lower, with 23.4 percent of wedding/honeymoon visitors and less than 40 percent of the visitors from other groups responded that they will “very likely” come back. More than half (52.5%) of the repeat visitors and 29.4 percent of the first time respondents would “very likely” return to Hawaii.

The primary reason given by European respondents who will not return to the islands is that they want to “go somewhere new” (58.1%). The “flight is too long” (54.4%) was the major explanation given (TABLES 4.12 & 4.18).

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

<b>Criterion</b>	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
<b>Oahu</b>						
Excellent	55.8%	53.1%	58.9%	53.4%	58.6%	60.7%
Above Average	36.5%	39.1%	33.5%	43.1%	34.2%	32.7%
Below Average	5.6%	5.8%	5.5%	3.2%	6.0%	6.0%
Poor	2.0%	2.0%	2.1%	0.2%	1.1%	0.6%
<b>Maui</b>						
Excellent	70.3%	68.5%	72.8%	53.0%	69.0%	67.0%
Above Average	25.8%	27.5%	23.6%	43.1%	26.9%	28.8%
Below Average	2.9%	3.0%	2.7%	3.2%	4.1%	3.4%
Poor	1.0%	1.1%	0.8%	0.7%	0.0%	0.8%
<b>Molokai</b>						
Excellent	57.8%	58.8%	56.5%	49.7%	31.6%	44.0%
Above Average	34.0%	34.3%	33.6%	40.9%	29.8%	54.9%
Below Average	6.4%	3.9%	9.8%	9.4%	29.6%	1.1%
Poor	1.7%	3.0%	0.0%	0.0%	9.0%	0.0%
<b>Lanai</b>						
Excellent	60.9%	62.4%	60.2%	19.1%	52.2%	54.7%
Above Average	34.5%	31.8%	36.6%	80.9%	34.7%	39.1%
Below Average	3.7%	4.1%	3.2%	0.0%	10.0%	5.2%
Poor	0.9%	1.7%	0.0%	0.0%	3.2%	1.0%
<b>Big Island</b>						
Excellent	63.2%	61.1%	65.9%	57.7%	56.6%	63.1%
Above Average	32.3%	32.7%	31.2%	35.9%	38.7%	32.6%
Below Average	3.3%	4.4%	2.4%	5.9%	4.5%	3.5%
Poor	1.1%	1.9%	0.5%	0.4%	0.2%	0.7%
<b>Kauai</b>						
Excellent	73.3%	75.7%	70.5%	46.3%	66.4%	72.0%
Above Average	24.7%	22.7%	27.0%	41.6%	28.6%	23.5%
Below Average	1.8%	1.4%	2.2%	11.9%	4.0%	3.9%
Poor	0.2%	0.2%	0.3%	0.3%	1.0%	0.6%

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

<b>Criterion</b>	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Excellent	68.2%	66.8%	70.0%	51.0%	65.6%	67.2%
Above average	28.7%	29.7%	27.2%	46.8%	30.9%	30.2%
Below average	2.8%	3.0%	2.5%	2.1%	3.1%	2.4%
Poor	0.4%	0.4%	0.3%	0.1%	0.3%	0.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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

<b>Criterion</b>	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Exceeded expectations	35.4%	31.0%	41.8%	29.2%	34.9%	41.4%
Met expectations	60.9%	65.2%	54.5%	66.2%	61.0%	54.3%
Did not meet expectations	3.7%	3.8%	3.7%	4.6%	4.2%	4.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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

<b>Criterion</b>	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Very likely	88.6%	88.7%	87.9%	69.3%	84.1%	79.0%
Somewhat likely	9.4%	9.1%	10.4%	27.9%	12.7%	17.2%
Not too likely	1.7%	1.9%	1.4%	2.5%	2.9%	3.4%
Not at all likely	0.3%	0.3%	0.3%	0.2%	0.3%	0.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	88.4%	9.6%	1.7%	0.3%
Lifestyle / Lifestage segments				
Wedding / honeymoon	86.6%	13.4%	0.0%	0.0%
Family	90.3%	7.6%	1.7%	0.4%
Young	86.6%	11.8%	1.7%	0.0%
Middle age	88.8%	9.5%	1.6%	0.2%
Seniors	87.3%	10.0%	2.2%	0.5%
Others	91.1%	6.3%	2.7%	0.0%
Visitation status				
First timers	85.0%	12.7%	2.1%	0.2%
Repeat visitors	90.1%	8.1%	1.6%	0.3%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	88.7%	9.1%	1.9%	0.3%
Lifestyle / Lifestage segments				
Wedding / honeymoon	82.6%	17.4%	0.0%	0.0%
Family	93.4%	4.9%	1.4%	0.4%
Young	87.3%	10.6%	2.1%	0.0%
Middle age	87.9%	10.6%	1.5%	0.0%
Seniors	86.4%	10.0%	3.0%	0.6%
Others	92.5%	4.6%	2.9%	0.0%
Visitation status				
First timers	85.0%	12.7%	2.3%	0.0%
Repeat visitors	89.8%	8.0%	1.8%	0.3%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	87.9%	10.4%	1.4%	0.3%
Lifestyle / Lifestage segments				
Wedding / honeymoon	89.3%	10.7%	0.0%	0.0%
Family	83.9%	13.4%	2.3%	0.4%
Young	85.4%	13.6%	1.0%	0.0%
Middle age	90.2%	7.8%	1.6%	0.4%
Seniors	88.5%	10.0%	1.2%	0.4%
Others	88.5%	9.3%	2.2%	0.0%
Visitation status				
First timers	85.0%	12.7%	1.9%	0.4%
Repeat visitors	90.6%	8.2%	0.9%	0.2%



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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	69.3%	27.9%	2.5%	0.2%
Lifestyle / Lifestage segments				
Wedding / honeymoon	79.6%	18.4%	2.0%	0.0%
Family	68.9%	28.3%	2.6%	0.2%
Young	76.5%	21.1%	2.1%	0.3%
Middle age	66.8%	30.3%	2.6%	0.3%
Seniors	61.8%	34.9%	3.0%	0.4%
Others	66.3%	30.9%	2.8%	0.0%
Visitation status				
First timers	65.2%	31.5%	3.1%	0.2%
Repeat visitors	72.8%	24.9%	2.0%	0.3%

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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	84.1%	12.7%	2.9%	0.3%
Lifestyle / Lifestage segments				
Wedding / honeymoon	82.9%	17.1%	0.0%	0.0%
Family	85.3%	12.7%	2.1%	0.0%
Young	83.0%	15.7%	1.3%	0.0%
Middle age	81.6%	12.4%	5.1%	0.9%
Seniors	87.1%	10.4%	2.5%	0.0%
Others	81.0%	16.2%	2.8%	0.0%
Visitation status				
First timers	81.7%	14.1%	4.0%	0.2%
Repeat visitors	86.0%	11.7%	2.0%	0.3%

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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	79.0%	17.2%	3.4%	0.4%
Lifestyle / Lifestage segments				
Wedding / honeymoon	86.6%	11.3%	2.1%	0.0%
Family	82.1%	14.6%	2.9%	0.4%
Young	80.9%	15.4%	2.7%	0.9%
Middle age	76.4%	19.6%	3.7%	0.3%
Seniors	77.1%	18.3%	4.3%	0.2%
Others	74.3%	22.3%	3.4%	0.0%
Visitation status				
First timers	77.3%	18.5%	3.7%	0.4%
Repeat visitors	83.3%	13.8%	2.7%	0.2%

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

Criterion	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Very likely	65.4%	75.2%	50.2%	48.9%	52.8%	35.9%
Somewhat likely	20.5%	17.0%	25.8%	35.9%	26.5%	30.8%
Not too likely	12.1%	6.9%	20.3%	13.6%	16.6%	26.6%
Not at all likely	1.9%	0.8%	3.7%	1.6%	4.1%	6.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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

Criterion	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Too expensive	48.7%	44.5%	50.3%	20.6%	50.4%	28.6%
Want to go someplace new	49.0%	50.7%	48.9%	58.0%	49.4%	58.1%
Flight too long	26.6%	7.1%	36.7%	22.5%	28.4%	54.4%
Too commercial / overdeveloped	14.6%	18.3%	12.8%	8.0%	16.5%	14.2%
Too crowded / congested	15.3%	20.5%	12.8%	10.5%	12.6%	5.0%
Other	16.2%	22.9%	13.0%	28.5%	16.9%	10.7%

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

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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	65.3%	20.5%	12.2%	2.0%
Lifestyle / Lifestage segments				
Wedding / honeymoon	56.0%	25.3%	15.6%	3.0%
Family	67.9%	18.6%	11.8%	1.8%
Young	57.1%	28.6%	13.3%	0.9%
Middle age	69.7%	18.6%	10.5%	1.2%
Seniors	63.6%	19.2%	14.1%	3.1%
Others	67.2%	23.5%	6.8%	2.5%
Visitation status				
First timers	45.9%	30.5%	19.8%	3.8%
Repeat visitors	74.9%	15.6%	8.5%	1.1%

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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	75.2%	17.0%	6.9%	0.8%
Lifestyle / Lifestage segments				
Wedding / honeymoon	72.8%	15.2%	12.0%	0.0%
Family	76.3%	16.5%	6.1%	1.1%
Young	66.3%	28.1%	5.5%	0.0%
Middle age	79.0%	14.3%	6.5%	0.1%
Seniors	74.4%	14.9%	8.7%	2.0%
Others	74.8%	21.2%	4.0%	0.0%
Visitation status				
First timers	58.9%	27.8%	11.7%	1.5%
Repeat visitors	79.9%	13.9%	5.5%	0.6%

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

<b>Lifestage</b>	<b>Very Likely</b>	<b>Somewhat Likely</b>	<b>Not Too Likely</b>	<b>Not At All Likely</b>
All visitors	50.2%	25.8%	20.3%	3.7%
Lifestyle / Lifestage segments				
Wedding / honeymoon	44.8%	32.1%	18.1%	5.1%
Family	50.6%	22.8%	23.3%	3.3%
Young	43.4%	29.3%	25.0%	2.4%
Middle age	55.1%	25.3%	16.8%	2.9%
Seniors	49.0%	25.0%	21.5%	4.5%
Others	52.8%	27.8%	12.1%	7.2%
Visitation status				
First timers	36.8%	32.3%	25.6%	5.3%
Repeat visitors	63.1%	19.6%	15.3%	2.1%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	48.9%	35.9%	13.6%	1.6%
Lifestyle / Lifestage segments				
Wedding / honeymoon	32.8%	42.0%	21.5%	3.7%
Family	49.2%	36.7%	12.9%	1.2%
Young	50.5%	36.2%	12.8%	0.6%
Middle age	55.0%	32.0%	11.3%	1.8%
Seniors	52.3%	33.5%	13.1%	1.0%
Others	41.2%	45.2%	10.7%	3.0%
Visitation status				
First timers	30.6%	45.1%	21.6%	2.8%
Repeat visitors	64.0%	28.4%	7.1%	0.5%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	52.8%	26.5%	16.6%	4.1%
Lifestyle / Lifestage segments				
Wedding / honeymoon	37.8%	20.1%	34.4%	7.7%
Family	52.7%	28.5%	15.7%	3.2%
Young	48.9%	29.2%	19.4%	2.5%
Middle age	54.1%	27.4%	13.4%	5.2%
Seniors	57.7%	22.1%	16.9%	3.3%
Others	39.9%	36.0%	14.3%	9.8%
Visitation status				
First timers	38.4%	31.3%	24.3%	6.1%
Repeat visitors	63.4%	23.0%	11.0%	2.6%

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

Lifestage	Very Likely	Somewhat Likely	Not Too Likely	Not At All Likely
All visitors	35.9%	30.8%	26.6%	6.7%
Lifestyle / Lifestage segments				
Wedding / honeymoon	23.4%	32.3%	36.3%	7.9%
Family	34.3%	33.2%	24.6%	8.0%
Young	38.0%	30.6%	24.2%	7.2%
Middle age	39.2%	30.7%	24.5%	5.5%
Seniors	35.9%	30.0%	26.9%	7.2%
Others	33.5%	25.3%	37.5%	3.7%
Visitation status				
First timers	29.4%	31.9%	30.1%	8.7%
Repeat visitors	52.5%	28.0%	17.7%	1.8%

## 5. ACTIVITY PARTICIPATION



## ACTIVITY PARTICIPATION

### Shopping:

Shopping was the most popular activity among all visitors surveyed. While virtually all of the respondents engaged in shopping during their stay in Hawaii, visitors from Japan had the highest participation rate at 97.8 percent, followed by European (96.6%), Canadian (95.8%), U.S. West (94.5%) and U.S. East (94.3%) respondents (TABLES 5.2 TO 5.12).

### U.S. Visitors:

- The four most popular shopping places for U.S. West and U.S. East visitors were supermarkets, convenience stores, hotel stores and department stores. Nearly 50 to 67 percent of U.S. West and U.S. East visitors shopped in these four places during their stay in the islands. Supermarket shopping by U.S. West and U.S. East visitors was higher on the Neighbor Islands than on Oahu. Generally shopping activities by U.S. West, U.S. East visitors were more distributed across Oahu, Maui, Kauai and the Big Island.
- Over 94 percent of the family, young, wedding/honeymoon, seniors and middle age visitors from the U.S. West participated in shopping activities. A higher percentage of young U.S. West visitors shopped in convenience store, department store and swap meet/flea markets while more wedding/honeymoon visitors shopped in supermarkets, hotel stores and discount/outlet stores.
- Overall, more wedding/honeymoon and younger U.S. East visitors participated in shopping compared to other visitors from this market. Designer boutiques and hotel stores were more popular with wedding/honeymoon U.S. East respondents, while young visitors shopped more in convenience stores and swap meet/flea markets. Department stores, supermarkets and discount/outlet stores are more popular with families.

### Japanese Visitors:

- In contrast to their U.S., Canadian and European counterparts, most Japanese visitors favored shopping in duty free stores (83.5%). Convenience stores (79.8%), designer boutiques (61.7%) and department stores (52.5%) were the next most popular choices. The majority of the Japanese respondents concentrated their shopping on Oahu.
- The most active shoppers among the Japanese respondents were wedding/honeymoon, families and young visitors with participation rates of nearly 99 percent. A higher percentage of wedding/honeymoon visitors shopped in duty free stores, designer boutiques and department stores compared to other Japanese visitors surveyed. More young Japanese visitors shopped in convenience stores while more families shopped in hotel stores. Supermarkets and discount/outlet stores are similarly popular among families and younger Japanese respondents.

### Canadian Visitors:

- Similar to U.S. visitors, more Canadian visitors shopped in supermarkets, convenience stores and department stores compared to other shopping venues. Shopping activities by Canadian visitors were also more distributed across Oahu, Maui, Kauai and the Big Island.
- Families were more active in shopping than other groups from this visitor market. More Canadian families shopped in supermarkets, convenience stores and department stores, designer boutique and discount/outlet stores while a higher percentage of young visitors shopped in convenience stores and swap meet/flea markets.

### European Visitors:

- More European visitors shopped in department stores and supermarkets. Shopping activities by European visitors were also more distributed across Oahu, Maui, Kauai and the Big Island compared to Japanese visitors.
- A higher percentage of younger European visitors surveyed shopped in department stores and supermarkets.

### Sightseeing:

Over 92 percent of the respondents from the U.S. East, Japan, Canada and Europe and 88.1 percent of U.S. West visitors surveyed went sightseeing while in Hawaii. The three most popular sightseeing activities among these visitors were self-guided tours, tour bus excursions and boat tours/submarine/whale watching tours (TABLES 5.2 TO 5.12).

### U.S. Visitors:

- Close to 79 percent of U.S. West and U.S. East visitors went on self-guided tours, which were popular across all life stages and age groups and similarly distributed across Oahu, Kauai, Maui and the Big Island.
- After self-guided tours, the second most popular sightseeing activities for U.S. West and U.S. East visitors across all life stages and age groups were boat tours/submarine/whale watching tours. More U.S. West and U.S. East went on boat tours/submarine/whale watching tours on Maui and Kauai.
- A higher percentage of U.S. West respondents who visited Oahu went on tour bus excursions compared to those who visited the neighbor islands. Tour bus excursions were popular among U.S. East visitors not just on Oahu but also on the neighbor islands.

### Japanese Visitors:

- In contrast to other visitors surveyed, just over 55 percent of the Japanese respondents went on self-guided tours but mainly on Oahu. Self-guided tours were more popular with young visitors but were also heavily participated by wedding/honeymoon, families, middle age and senior Japanese visitors surveyed.
- Tour bus excursions were the second most popular sightseeing activities among Japanese respondents. A higher percentage of senior visitors went on tour bus excursions compared to Japanese visitors in other lifestage and age groups. Tour bus excursions were more popular among Japanese visitors on the neighbor islands compared to those who went to Oahu.
- More Japanese respondents went on boat tours/submarine/whale watching tours while on Maui and Oahu than on Kauai and the Big Island. A higher percentage of Japanese wedding/honeymoon visitors participated in this activity than other Japanese visitor groups.
- More Japanese visitors went on private limousine/van tours compared to their U.S. counterparts. A higher percentage of Japanese wedding/honeymoon visitors took private limousine/van tours compared to all visitors from U.S and Canada.

### Canadian Visitors:

- Similar to U.S. respondents a large number of Canadian (81.6%) visitors went on self-guided tours which were popular across all islands among all lifestyle and age groups.
- Ranked second in popularity among Canadians was boat tours/submarine/whale watching which was most popular among families and wedding/honeymoon visitors. Tour bus excursions ranked third and had the most participation from wedding/honeymoon visitors.

### European Visitors:

- Close to 70 percent of European visitors also went on self-guided tours.
- Tour bus excursions were the second most popular sightseeing activity. More seniors went sightseeing on tour bus than any other groups. A higher percentage of Canadian wedding/honeymoon visitors took boat tours/submarine/whale watching tours.

### **Recreation:**

About 90 percent of the visitors surveyed from the U.S. West, U.S. East, Canada and Europe and 82 percent of Japanese respondents participated in some type of recreational activity while in the islands.



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

Ranked third and fourth in popularity by U.S. and Canadian visitors were backpacking/hiking/camping and running/jogging/fitness walking respectively. In contrast, Japanese surveyed in 2004 preferred more water activities with jet skiing/parasailing/windsurfing and surfing/body boarding ranking third and fourth, respectively (TABLES 5.2 TO 5.12).

#### U.S. Visitors:

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

#### Japanese Visitors:

- In contrast to visitors from the other markets, fewer Japanese participated in swimming/sunbathing/beach and Japanese respondents did much of this activity on Oahu.
- Only 18.7 percent of the Japanese respondents went snorkeling/scuba diving, mainly on Maui and Oahu.
- More Japanese visitors went running/jogging/fitness walking on Oahu than on the Big Island, Maui, and Kauai.

- Golf and running/jogging/fitness walking were more popular with senior and middle age Japanese visitors while a higher percentage of young visitors went snorkeling/scuba diving, surfing/body boarding, jet skiing/parasailing/windsurfing and to gym/health spa. A higher percentage of wedding/honeymoon visitors participated in swimming/sunbathing/beach compared to other Japanese respondents.

#### Canadian Visitors:

- Similar to U.S. visitors, the majority of Canadian respondents went swimming/sunbathing/beach on each of the islands they visited.
- More families from Canada went surfing/body boarding and running/jogging/fitness walking compared to other Canadian respondents. Honeymoon/wedding visitors participated more in swimming/sunbathing/beach, snorkeling/scuba diving and gym/health spa. More seniors and families went golfing while more young Canadian visitors went backpacking/hiking/camping.

#### European Visitors:

- European respondents also went swimming/sunbathing/beach on each of the islands they visited.
- A higher percentage of younger European visitors went surfing/body boarding, backpacking/hiking/camping and running/jogging/fitness walking while more families participated in snorkeling/scuba diving and golf.

#### **Cultural:**

On a statewide basis, close to 80 percent of the U.S. West, U.S. East, Canadian and European respondents participated in or attended cultural activities compared to 55.3 percent of their Japanese counterparts.

The most popular cultural activity among the respondents from these visitor markets was to visit historical sites in the islands. Attending Polynesian shows/luaus, was the second most popular activity followed by visiting museums/art galleries. Compared to other visitor markets, more Japanese visitors went to cultural festivals compared to art/craft fairs.

Survey results also indicated that U.S., Canadian and European respondents generally visited one or more cultural attractions across all islands. In contrast, the majority of the Japanese respondents who participated in cultural activities did so mainly on Oahu (TABLES 5.2 TO 5.12).

#### U.S. Visitors:

- More wedding/honeymoon respondents from the U.S. West visited historical sites, Polynesian shows/luau and festivals while more seniors went to museums/art galleries and art/craft fairs.
- A higher percentage of U.S. East seniors visited historic sites and museums/art galleries than any other visitors from this market. Polynesian shows/luau were more popular with wedding/honeymoon visitors while more middle age visitors went to art/craft fairs and festivals.

#### Japanese Visitors:

- A higher percentage of Japanese seniors visited historic sites, museums/art galleries and attended Polynesian shows/luau than any other Japanese visitors surveyed. Festivals were similarly popular with seniors, middle age and wedding/honeymoon visitors.

#### Canadian Visitors:

- More Canadian families visited historic sites, museums/art galleries and art/craft fairs while a higher percentage of wedding/honeymoon attended Polynesian show/luau.

#### European Visitors:

- More middle age European survey respondents visited Hawaii's historical sites and museums/art galleries while more wedding/honeymoon visitors went to Polynesian shows/luaus.

### **Entertainment:**

While the majority of the respondents from all visitor markets engaged in some form of entertainment activities during their stay, the percentage was higher among the Japanese respondents (88.6%) versus those from the U.S. West, U.S. East, Canadian and European at close to 82 percent. Fine dining was the most popular activity followed by lunch/sunset/dinner evening cruise, lounge acts/stage shows and nightclub/dancing/bar/karaoke. Japanese, Canadians and European visitors participated in these activities mainly on Oahu while participation in entertainment activities by U.S. visitors was higher on Maui than on Oahu (TABLES 5.2 TO 5.12).

#### U.S. Visitors:

- More wedding/honeymoon visitors from the U.S. West and U.S. East went to fine dining restaurants, sailed on lunch/sunset/dinner/evening cruises and saw lounge acts/stage shows than other visitor groups while a higher percentage of younger visitors from these two markets went to nightclubs/dancing/bar/karaoke.

### Japanese Visitors:

- More senior respondents saw lounge acts/stage shows while a higher percentage of young Japanese visitors went to fine dining restaurants and nightclubs/dancing/bars/karaoke. Nearly 64 percent of the wedding/honeymoon visitors sailed on lunch/sunset/dinner/evening cruises.

### Canadian Visitors:

- Similar to U.S. respondents, more wedding/honeymoon visitors from Canada went to fine dining restaurants and sailed on lunch/sunset/dinner/evening cruises while a higher percentage of younger visitors went to nightclubs/dancing/bar/karaoke. Lounge acts/stage shows were equally popular among wedding/honeymoon and families.

### European Visitors:

- A higher percentage of young European respondents went to nightclubs/dancing/bars/karaoke and sailed on lunch/sunset/dinner/evening cruises while more European wedding/honeymoon visitors saw lounge acts/stage shows and went to fine dining restaurants.

## **Transportation:**

Close to 90 percent of the respondents from the U.S. West, U.S. East, Japan, Canada and Europe surveyed in 2004 indicated that they used some form of transportation during their stay. However, the mode of transportation differed especially between U.S. and Japanese visitors and by island.

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

In contrast, the 63.9 percent of the Japanese respondents toured the islands by trolleys followed by taxis or limousines and public buses. Only 15.7 percent of the respondents used rental cars. More Japanese visitors used rental cars while on Maui than on any of the other islands (TABLES 5.2 TO 5.12).

### U.S. Visitors:

- Younger visitors from the U.S. West reported higher usage of taxi/limousine and public buses than other U.S. West respondents, while rental cars were more popular with wedding/honeymoon visitors. Public buses were equally popular with young and senior visitors from the U.S. East. A higher percentage of seniors used trolleys while more wedding/honeymoon visitors rented cars.

Japanese Visitors:

- Trolleys (85%) were the most popular choices among Japanese wedding/honeymoon visitors while more families used taxis/limousines and rental cars. A higher percentage of middle age and senior visitors used public buses.

Canadian Visitors:

- Rental cars were more popular among Canadian families than other visitors from this market. Taxis/limousines were more utilized by middle aged Canadian respondents while public busses and trolleys were more utilized by wedding/honeymoon respondents.

European Visitors:

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

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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>89.9%</b>	<b>86.9%</b>	<b>94.7%</b>	<b>90.7%</b>	<b>90.1%</b>
Helicopter / airplane tour	13.0%	2.5%	25.3%	8.3%	12.6%
Boat tour / submarine / whale watching	31.3%	16.1%	27.4%	35.0%	19.5%
Tour bus excursion	16.5%	22.4%	13.2%	11.3%	15.3%
Private limousine / van tour	6.5%	5.2%	2.5%	5.9%	4.0%
Self-guided	78.6%	71.1%	75.7%	74.6%	71.4%
<b>Recreation</b>	<b>90.4%</b>	<b>82.3%</b>	<b>82.6%</b>	<b>88.1%</b>	<b>74.9%</b>
Swimming / sunbathing / beach	83.4%	74.7%	73.5%	80.4%	61.4%
Surfing/bodyboarding	24.0%	19.0%	19.3%	24.0%	11.8%
Snorkeling / scuba diving	51.2%	32.4%	43.8%	53.1%	42.5%
Jet skiing / parasailing / windsurfing	5.4%	4.0%	0.6%	6.4%	3.2%
Golf	14.6%	7.1%	13.0%	15.6%	12.6%
Running / jogging / fitness walking	36.5%	31.0%	31.7%	34.7%	28.2%
Gym / health spa	15.4%	10.2%	12.8%	15.1%	12.4%
Backpacking / hiking / camping	22.0%	15.3%	26.9%	14.2%	20.6%
Sports event or tournament	3.7%	5.0%	0.4%	1.8%	1.7%
<b>Entertainment</b>	<b>82.3%</b>	<b>75.1%</b>	<b>73.0%</b>	<b>79.5%</b>	<b>63.1%</b>
Lunch / sunset / dinner / evening cruise	33.4%	29.3%	25.9%	30.6%	23.4%
Lounge act / stage show	30.6%	26.7%	19.8%	29.3%	14.1%
Nightclub / dancing / bar / karaoke	17.4%	18.6%	9.8%	12.7%	9.3%
Fine dining	64.7%	54.3%	60.7%	62.5%	49.1%
<b>Shopping</b>	<b>94.5%</b>	<b>91.6%</b>	<b>84.8%</b>	<b>92.4%</b>	<b>81.5%</b>
Department stores	49.4%	52.3%	26.0%	37.8%	30.9%
Designer boutiques	43.0%	31.4%	35.5%	47.3%	29.6%
Hotel stores	49.9%	48.5%	30.6%	43.1%	33.5%
Swap meet / flea markets	33.7%	36.3%	18.0%	19.7%	18.4%
Discount / outlet stores	41.2%	27.0%	38.0%	36.4%	40.5%
Supermarkets	61.4%	37.9%	56.9%	64.4%	48.0%
Convenience stores	59.1%	56.7%	45.2%	52.9%	42.6%
Duty free store	6.4%	7.8%	1.9%	3.9%	3.3%
<b>Culture</b>	<b>78.9%</b>	<b>74.7%</b>	<b>69.2%</b>	<b>72.1%</b>	<b>68.1%</b>
Historic site	60.4%	60.3%	53.3%	43.5%	59.6%
Museum / art gallery	29.6%	22.6%	20.0%	26.8%	24.2%
Polynesian show / luau	46.9%	41.7%	29.9%	40.8%	22.3%
Art / craft fair	18.2%	9.0%	20.4%	17.7%	12.8%
Festival	6.3%	7.1%	2.0%	3.6%	2.6%
<b>Transportation</b>	<b>89.2%</b>	<b>83.0%</b>	<b>82.2%</b>	<b>87.9%</b>	<b>79.5%</b>
Trolley	7.6%	12.3%	0.3%	1.7%	1.4%
Public Bus	14.4%	23.2%	2.1%	4.5%	3.6%
Taxi / limousine	18.4%	25.0%	4.7%	9.1%	7.7%
Rental car	77.4%	55.7%	78.6%	82.4%	73.5%

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

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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>88.1%</b>	<b>84.3%</b>	<b>95.1%</b>	<b>88.8%</b>	<b>87.1%</b>
Helicopter / airplane tour	10.1%	2.7%	20.4%	8.1%	9.5%
Boat tour / submarine / whale watching	28.2%	15.7%	26.8%	33.6%	22.2%
Tour bus excursion	11.6%	17.9%	5.5%	6.9%	6.7%
Private limousine / van tour	5.4%	4.5%	1.3%	4.8%	4.6%
Self-guided	78.4%	72.1%	85.1%	77.4%	76.8%
<b>Recreation</b>	<b>90.8%</b>	<b>85.2%</b>	<b>89.0%</b>	<b>92.3%</b>	<b>81.4%</b>
Swimming / sunbathing / beach	83.0%	75.6%	79.4%	84.9%	67.7%
Surfing/bodyboarding	27.3%	22.4%	24.5%	30.1%	15.4%
Snorkeling / scuba diving	53.6%	35.3%	51.9%	58.2%	48.7%
Jet skiing / parasailing / windsurfing	5.7%	5.3%	0.7%	7.2%	3.6%
Golf	15.9%	9.3%	14.5%	18.3%	15.3%
Running / jogging / fitness walking	38.3%	34.2%	34.2%	38.7%	30.8%
Gym / health spa	15.2%	10.4%	13.1%	16.0%	14.9%
Backpacking / hiking / camping	20.2%	14.4%	28.5%	14.0%	21.7%
Sports event or tournament	3.5%	5.3%	0.5%	1.8%	1.8%
<b>Entertainment</b>	<b>81.4%</b>	<b>75.9%</b>	<b>79.0%</b>	<b>81.7%</b>	<b>66.5%</b>
Lunch / sunset / dinner / evening cruise	31.5%	31.2%	26.2%	30.7%	23.7%
Lounge act / stage show	28.9%	25.8%	20.3%	32.1%	14.2%
Nightclub / dancing / bar / karaoke	17.5%	19.8%	12.2%	13.4%	12.0%
Fine dining	64.5%	54.7%	67.1%	64.2%	55.1%
<b>Shopping</b>	<b>94.5%</b>	<b>93.5%</b>	<b>88.3%</b>	<b>95.5%</b>	<b>86.0%</b>
Department stores	48.6%	55.7%	28.8%	40.8%	32.8%
Designer boutiques	43.0%	30.0%	40.9%	50.8%	33.4%
Hotel stores	46.5%	46.0%	31.3%	43.7%	34.9%
Swap meet / flea markets	33.7%	38.5%	22.0%	22.3%	22.6%
Discount / outlet stores	40.9%	29.0%	40.6%	38.5%	42.7%
Supermarkets	66.5%	43.9%	67.0%	75.0%	56.9%
Convenience stores	58.8%	59.2%	47.2%	56.0%	41.9%
Duty free store	5.9%	8.4%	1.4%	4.1%	3.2%
<b>Culture</b>	<b>76.4%</b>	<b>71.8%</b>	<b>71.6%</b>	<b>70.8%</b>	<b>70.7%</b>
Historic site	57.2%	55.7%	55.4%	41.9%	62.2%
Museum / art gallery	30.0%	23.1%	24.3%	29.8%	27.1%
Polynesian show / luau	41.6%	40.2%	33.1%	38.8%	20.6%
Art / craft fair	19.5%	10.0%	24.4%	20.5%	16.8%
Festival	6.3%	7.4%	2.2%	4.5%	3.5%
<b>Transportation</b>	<b>89.2%</b>	<b>84.2%</b>	<b>89.4%</b>	<b>91.6%</b>	<b>84.2%</b>
Trolley	6.3%	11.7%	0.3%	1.7%	1.4%
Public Bus	12.5%	24.1%	0.6%	4.2%	2.1%
Taxi / limousine	16.5%	25.5%	4.5%	9.0%	7.7%
Rental car	79.0%	58.4%	87.3%	87.7%	80.4%

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

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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>92.8%</b>	<b>89.5%</b>	<b>94.3%</b>	<b>93.6%</b>	<b>93.9%</b>
Helicopter / airplane tour	17.3%	2.3%	31.1%	8.8%	16.0%
Boat tour / submarine / whale watching	36.2%	16.5%	28.6%	36.7%	16.8%
Tour bus excursion	23.8%	27.1%	22.3%	17.5%	25.7%
Private limousine / van tour	8.1%	5.9%	3.8%	7.3%	3.4%
Self-guided	79.0%	69.9%	64.9%	71.0%	64.7%
<b>Recreation</b>	<b>89.7%</b>	<b>79.3%</b>	<b>74.5%</b>	<b>82.7%</b>	<b>67.3%</b>
Swimming / sunbathing / beach	84.1%	74.0%	66.1%	74.8%	54.2%
Surfing/bodyboarding	18.9%	15.4%	12.1%	16.3%	7.3%
Snorkeling / scuba diving	47.8%	29.3%	33.8%	46.3%	35.8%
Jet skiing / parasailing / windsurfing	4.9%	2.7%	0.4%	5.3%	2.6%
Golf	12.3%	4.6%	10.5%	11.7%	9.4%
Running / jogging / fitness walking	33.7%	27.9%	28.2%	29.3%	25.0%
Gym / health spa	15.5%	9.9%	12.2%	14.0%	9.5%
Backpacking / hiking / camping	24.9%	16.3%	25.2%	14.8%	19.6%
Sports event or tournament	4.0%	4.6%	0.3%	1.6%	1.5%
<b>Entertainment</b>	<b>83.5%</b>	<b>74.2%</b>	<b>65.2%</b>	<b>76.6%</b>	<b>59.0%</b>
Lunch / sunset / dinner / evening cruise	36.2%	27.2%	25.6%	30.5%	22.9%
Lounge act / stage show	32.9%	27.3%	18.9%	25.4%	13.7%
Nightclub / dancing / bar / karaoke	17.5%	17.3%	7.4%	12.0%	6.5%
Fine dining	65.0%	53.9%	52.5%	60.6%	41.6%
<b>Shopping</b>	<b>94.3%</b>	<b>89.3%</b>	<b>80.6%</b>	<b>88.1%</b>	<b>76.4%</b>
Department stores	50.8%	48.8%	23.2%	34.5%	28.6%
Designer boutiques	43.0%	32.5%	29.1%	43.1%	24.9%
Hotel stores	54.8%	50.9%	29.9%	42.4%	31.5%
Swap meet / flea markets	33.4%	33.8%	13.1%	16.2%	13.6%
Discount / outlet stores	41.5%	25.0%	34.6%	33.2%	37.7%
Supermarkets	53.9%	31.5%	45.2%	50.3%	37.5%
Convenience stores	59.1%	53.7%	42.0%	48.5%	43.8%
Duty free store	7.1%	7.2%	2.5%	3.6%	3.3%
<b>Culture</b>	<b>83.0%</b>	<b>78.0%</b>	<b>66.0%</b>	<b>74.3%</b>	<b>65.5%</b>
Historic site	65.8%	65.6%	51.0%	46.5%	57.2%
Museum / art gallery	29.1%	22.0%	14.6%	22.9%	20.8%
Polynesian show / luau	54.6%	42.8%	25.9%	43.5%	24.6%
Art / craft fair	16.7%	7.9%	15.8%	14.7%	8.2%
Festival	6.3%	6.8%	1.7%	2.3%	1.9%
<b>Transportation</b>	<b>89.2%</b>	<b>81.6%</b>	<b>73.9%</b>	<b>83.1%</b>	<b>73.7%</b>
Trolley	9.4%	12.8%	0.4%	1.6%	1.4%
Public Bus	17.0%	22.3%	4.0%	4.9%	5.3%
Taxi / limousine	21.2%	24.3%	5.1%	10.0%	7.5%
Rental car	75.0%	52.9%	68.1%	75.5%	65.0%

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



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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>92.2%</b>	<b>89.6%</b>	<b>95.6%</b>	<b>91.0%</b>	<b>94.3%</b>
Helicopter / airplane tour	4.5%	2.7%	8.5%	5.5%	3.8%
Boat tour / submarine / whale watching	18.4%	15.3%	12.2%	18.1%	7.4%
Tour bus excursion	47.6%	38.6%	67.6%	49.8%	61.6%
Private limousine / van tour	15.7%	13.5%	3.4%	7.4%	12.8%
Self-guided	55.1%	54.0%	21.9%	30.6%	25.6%
<b>Recreation</b>	<b>81.9%</b>	<b>80.2%</b>	<b>28.4%</b>	<b>54.5%</b>	<b>44.8%</b>
Swimming / sunbathing / beach	68.9%	67.5%	23.0%	42.4%	30.3%
Surfing/bodyboarding	6.9%	6.8%	1.4%	2.3%	1.3%
Snorkeling / scuba diving	18.7%	16.5%	0.7%	17.0%	8.1%
Jet skiing / parasailing / windsurfing	4.6%	4.7%	0.0%	0.9%	0.2%
Golf	9.1%	7.0%	8.2%	11.9%	9.1%
Running / jogging / fitness walking	15.4%	14.1%	5.3%	9.4%	9.5%
Gym / health spa	6.8%	5.8%	1.7%	4.4%	3.4%
Backpacking / hiking / camping	7.9%	6.7%	3.0%	2.6%	5.8%
Sports event or tournament	2.6%	2.3%	0.0%	0.5%	0.8%
<b>Entertainment</b>	<b>88.6%</b>	<b>89.0%</b>	<b>52.4%</b>	<b>66.6%</b>	<b>61.8%</b>
Lunch / sunset / dinner / evening cruise	51.5%	51.2%	10.6%	21.1%	20.9%
Lounge act / stage show	23.2%	22.1%	5.1%	9.0%	7.8%
Nightclub / dancing / bar / karaoke	6.0%	5.8%	3.2%	1.6%	1.9%
Fine dining	72.6%	71.8%	48.2%	56.8%	53.3%
<b>Shopping</b>	<b>97.8%</b>	<b>99.2%</b>	<b>38.8%</b>	<b>64.2%</b>	<b>63.7%</b>
Department stores	52.5%	54.5%	0.0%	6.3%	5.0%
Designer boutiques	61.7%	63.4%	2.0%	19.4%	8.6%
Hotel stores	49.1%	46.6%	12.0%	26.1%	30.6%
Swap meet / flea markets	12.3%	11.6%	1.7%	5.3%	3.5%
Discount / outlet stores	37.6%	36.7%	10.4%	13.7%	13.5%
Supermarkets	51.0%	48.1%	20.6%	28.9%	28.7%
Convenience stores	79.8%	80.7%	13.5%	35.3%	25.0%
Duty free store	83.5%	86.0%	6.2%	7.6%	16.1%
<b>Culture</b>	<b>55.3%</b>	<b>52.2%</b>	<b>32.8%</b>	<b>33.0%</b>	<b>34.7%</b>
Historic site	27.6%	24.2%	25.2%	21.0%	24.5%
Museum / art gallery	17.7%	16.6%	2.8%	9.5%	7.1%
Polynesian show / luau	26.3%	24.7%	9.6%	9.8%	7.8%
Art / craft fair	2.4%	2.1%	0.7%	1.5%	1.3%
Festival	7.1%	6.8%	1.6%	2.2%	1.0%
<b>Transportation</b>	<b>92.9%</b>	<b>94.0%</b>	<b>25.1%</b>	<b>47.8%</b>	<b>40.7%</b>
Trolley	63.9%	66.2%	0.0%	7.6%	5.0%
Public Bus	26.5%	27.2%	0.6%	4.4%	1.3%
Taxi / limousine	47.4%	46.3%	9.4%	19.8%	19.2%
Rental car	15.7%	10.9%	15.1%	22.1%	19.5%

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

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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>94.0%</b>	<b>92.1%</b>	<b>95.3%</b>	<b>95.8%</b>	<b>96.1%</b>
Helicopter / airplane tour	12.1%	1.9%	26.0%	7.3%	14.3%
Boat tour / submarine / whale watching	33.4%	19.1%	22.2%	40.1%	14.0%
Tour bus excursion	24.5%	32.4%	19.2%	14.2%	21.0%
Private limousine / van tour	7.8%	8.4%	5.4%	4.9%	4.3%
Self-guided	81.6%	71.0%	72.8%	79.3%	74.2%
<b>Recreation</b>	<b>93.3%</b>	<b>87.6%</b>	<b>83.2%</b>	<b>87.0%</b>	<b>75.5%</b>
Swimming / sunbathing / beach	88.4%	82.0%	77.2%	81.4%	61.1%
Surfing/bodyboarding	30.5%	23.3%	18.4%	30.4%	12.8%
Snorkeling / scuba diving	49.6%	31.5%	36.9%	50.6%	37.1%
Jet skiing / parasailing / windsurfing	2.8%	2.6%	1.3%	2.4%	1.6%
Golf	15.7%	5.9%	13.5%	20.5%	10.8%
Running / jogging / fitness walking	42.2%	33.6%	36.3%	40.4%	31.2%
Gym / health spa	12.0%	7.5%	7.9%	11.1%	11.3%
Backpacking / hiking / camping	22.2%	16.2%	27.3%	15.7%	23.9%
Sports event or tournament	6.1%	5.4%	1.5%	4.3%	4.1%
<b>Entertainment</b>	<b>80.5%</b>	<b>76.1%</b>	<b>61.8%</b>	<b>70.8%</b>	<b>60.4%</b>
Lunch / sunset / dinner / evening cruise	36.5%	34.5%	27.4%	28.8%	27.3%
Lounge act / stage show	36.0%	35.6%	19.1%	22.5%	19.3%
Nightclub / dancing / bar / karaoke	18.7%	20.5%	9.7%	11.4%	9.8%
Fine dining	59.3%	52.5%	46.7%	53.0%	38.4%
<b>Shopping</b>	<b>95.8%</b>	<b>94.8%</b>	<b>84.8%</b>	<b>92.6%</b>	<b>83.0%</b>
Department stores	65.9%	66.6%	44.3%	49.8%	40.1%
Designer boutiques	48.1%	38.9%	30.8%	46.9%	30.2%
Hotel stores	51.1%	51.2%	23.9%	36.2%	28.5%
Swap meet / flea markets	40.5%	42.9%	19.9%	25.5%	22.3%
Discount / outlet stores	45.4%	30.4%	42.9%	39.3%	42.3%
Supermarkets	68.5%	49.2%	58.9%	67.2%	51.6%
Convenience stores	70.6%	71.6%	52.6%	60.0%	44.6%
Duty free store	12.1%	13.0%	4.9%	6.3%	6.7%
<b>Culture</b>	<b>81.9%</b>	<b>78.9%</b>	<b>69.8%</b>	<b>72.4%</b>	<b>72.5%</b>
Historic site	60.1%	58.9%	54.0%	48.0%	60.1%
Museum / art gallery	30.5%	22.7%	19.3%	28.2%	25.1%
Polynesian show / luau	51.9%	47.0%	30.5%	35.5%	27.0%
Art / craft fair	21.0%	12.4%	21.6%	18.8%	12.4%
Festival	5.8%	6.3%	3.5%	2.5%	2.9%
<b>Transportation</b>	<b>91.0%</b>	<b>87.2%</b>	<b>80.3%</b>	<b>88.2%</b>	<b>77.3%</b>
Trolley	14.4%	22.9%	1.4%	2.7%	3.2%
Public Bus	27.8%	44.0%	3.5%	6.1%	4.7%
Taxi / limousine	32.7%	44.1%	11.1%	11.8%	11.1%
Rental car	69.9%	40.4%	71.3%	80.2%	69.4%

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

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

Activity	State	Oahu	Kauai	Maui	Big Island
<b>Sightseeing</b>	<b>94.6%</b>	<b>94.4%</b>	<b>96.7%</b>	<b>93.3%</b>	<b>95.3%</b>
Helicopter / airplane tour	18.3%	6.2%	31.2%	7.5%	20.5%
Boat tour / submarine / whale watching	31.4%	20.3%	20.1%	29.3%	12.6%
Tour bus excursion	38.6%	43.1%	16.1%	16.9%	25.2%
Private limousine / van tour	17.1%	13.6%	12.1%	15.2%	12.3%
Self-guided	69.9%	63.4%	73.0%	69.4%	65.6%
<b>Recreation</b>	<b>92.7%</b>	<b>87.6%</b>	<b>78.5%</b>	<b>85.0%</b>	<b>71.5%</b>
Swimming / sunbathing / beach	89.5%	85.0%	70.7%	78.6%	59.1%
Surfing/bodyboarding	18.6%	14.9%	11.2%	16.9%	5.9%
Snorkeling / scuba diving	37.8%	23.0%	32.0%	38.6%	31.4%
Jet skiing / parasailing / windsurfing	3.3%	1.6%	0.4%	4.5%	0.7%
Golf	5.6%	2.7%	3.7%	6.3%	4.2%
Running / jogging / fitness walking	20.8%	16.8%	13.2%	19.2%	13.0%
Gym / health spa	9.6%	7.8%	5.5%	6.7%	4.5%
Backpacking / hiking / camping	15.6%	9.1%	25.2%	15.1%	23.8%
Sports event or tournament	4.6%	3.5%	0.3%	2.3%	3.5%
<b>Entertainment</b>	<b>82.0%</b>	<b>77.6%</b>	<b>54.6%</b>	<b>68.0%</b>	<b>50.6%</b>
Lunch / sunset / dinner / evening cruise	41.8%	39.3%	23.5%	32.3%	26.6%
Lounge act / stage show	27.8%	25.6%	12.7%	16.0%	7.5%
Nightclub / dancing / bar / karaoke	23.6%	23.7%	6.5%	16.7%	9.7%
Fine dining	54.1%	47.8%	35.0%	44.4%	27.7%
<b>Shopping</b>	<b>96.6%</b>	<b>95.0%</b>	<b>80.3%</b>	<b>89.8%</b>	<b>80.4%</b>
Department stores	73.6%	77.2%	34.5%	48.6%	35.8%
Designer boutiques	41.4%	39.0%	16.4%	30.6%	12.3%
Hotel stores	50.0%	51.0%	17.3%	27.1%	21.5%
Swap meet / flea markets	27.2%	27.2%	6.8%	11.9%	9.6%
Discount / outlet stores	35.8%	29.5%	17.9%	26.1%	24.1%
Supermarkets	69.4%	60.0%	60.8%	65.4%	59.0%
Convenience stores	53.1%	52.3%	32.6%	36.0%	28.3%
Duty free store	19.2%	19.2%	5.1%	9.0%	4.1%
<b>Culture</b>	<b>81.8%</b>	<b>79.7%</b>	<b>55.6%</b>	<b>61.8%</b>	<b>66.6%</b>
Historic site	65.6%	64.1%	42.7%	44.6%	60.3%
Museum / art gallery	29.2%	25.3%	13.3%	21.0%	18.3%
Polynesian show / luau	43.1%	39.6%	18.5%	25.6%	12.7%
Art / craft fair	13.3%	9.2%	11.9%	11.0%	5.4%
Festival	8.1%	8.5%	1.3%	3.1%	2.1%
<b>Transportation</b>	<b>91.6%</b>	<b>90.2%</b>	<b>79.8%</b>	<b>84.1%</b>	<b>76.9%</b>
Trolley	20.7%	25.4%	1.2%	5.2%	2.8%
Public Bus	40.0%	48.6%	3.7%	10.8%	6.0%
Taxi / limousine	36.9%	39.0%	9.8%	17.5%	13.5%
Rental car	52.8%	34.5%	71.0%	69.7%	64.8%

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

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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>96.6%</b>	<b>93.2%</b>	<b>92.6%</b>	<b>88.2%</b>	<b>90.2%</b>	<b>96.6%</b>	<b>88.0%</b>
Helicopter / airplane tour	31.9%	10.2%	11.5%	15.2%	10.8%	18.4%	10.6%
Boat tour / submarine / whale watching	43.1%	37.1%	29.1%	31.0%	27.9%	37.2%	29.1%
Tour bus excursion	18.8%	13.9%	16.6%	14.5%	19.6%	27.7%	10.8%
Private limousine / van tour	9.1%	4.6%	6.5%	6.4%	7.9%	8.4%	5.7%
Self-guided	86.9%	82.0%	85.0%	78.1%	76.4%	82.3%	78.5%
<b>Recreation</b>	<b>97.4%</b>	<b>98.2%</b>	<b>95.4%</b>	<b>91.0%</b>	<b>83.1%</b>	<b>92.5%</b>	<b>90.6%</b>
Swimming / sunbathing / beach	89.6%	96.5%	93.6%	83.0%	70.3%	87.7%	82.3%
Surfing/body boarding	19.7%	49.1%	34.2%	17.2%	9.3%	20.3%	26.2%
Snorkeling / scuba diving	71.8%	70.0%	63.0%	48.4%	33.4%	55.5%	50.1%
Jet skiing / parasailing / windsurfing	11.7%	9.5%	8.6%	4.3%	1.5%	5.9%	5.3%
Golf	14.9%	19.4%	11.0%	13.6%	13.9%	8.3%	17.8%
Running / jogging / fitness walking	34.7%	41.8%	37.4%	36.4%	34.6%	33.5%	38.9%
Gym / health spa	19.1%	19.8%	16.2%	17.1%	10.3%	11.0%	18.0%
Backpacking / hiking / camping	35.0%	23.9%	40.2%	21.2%	11.7%	28.8%	19.0%
Sports event or tournament	2.3%	3.1%	6.0%	3.2%	3.4%	3.7%	3.5%
<b>Entertainment</b>	<b>91.4%</b>	<b>84.7%</b>	<b>85.5%</b>	<b>82.6%</b>	<b>80.0%</b>	<b>87.3%</b>	<b>81.1%</b>
Lunch / sunset / dinner / evening cruise	48.5%	34.8%	38.6%	33.2%	28.3%	41.5%	29.7%
Lounge act / stage show	41.2%	34.8%	28.8%	28.9%	28.7%	40.3%	26.0%
Nightclub / dancing / bar / karaoke	20.5%	13.6%	37.1%	19.5%	9.9%	19.6%	16.9%
Fine dining	77.5%	65.6%	57.6%	66.7%	65.6%	63.5%	66.4%
<b>Shopping</b>	<b>96.5%</b>	<b>97.1%</b>	<b>96.4%</b>	<b>94.8%</b>	<b>94.1%</b>	<b>95.9%</b>	<b>95.1%</b>
Department stores	52.5%	50.8%	50.7%	49.2%	49.9%	52.3%	49.0%
Designer boutiques	50.9%	51.6%	41.1%	43.7%	36.9%	43.8%	43.3%
Hotel stores	61.7%	56.0%	44.6%	51.1%	46.0%	53.6%	48.8%
Swap meet / flea markets	36.4%	33.7%	44.2%	33.5%	29.5%	39.8%	31.1%
Discount / outlet stores	46.9%	43.4%	36.2%	41.2%	42.7%	41.0%	42.1%
Supermarkets	63.3%	71.2%	60.7%	59.9%	59.0%	55.5%	65.7%
Convenience stores	61.8%	62.2%	66.1%	61.1%	54.3%	61.9%	59.2%
Duty free store	9.9%	7.7%	9.6%	6.3%	3.8%	9.7%	4.9%
<b>Culture</b>	<b>84.9%</b>	<b>83.7%</b>	<b>80.6%</b>	<b>76.0%</b>	<b>78.7%</b>	<b>88.6%</b>	<b>75.0%</b>
Historic site	58.5%	63.1%	62.2%	56.6%	63.1%	72.2%	55.1%
Museum / art gallery	25.0%	30.7%	24.1%	27.2%	35.1%	28.0%	30.5%
Polynesian show / luau	68.6%	56.9%	49.1%	43.0%	39.0%	66.2%	37.5%
Art / craft fair	13.6%	18.7%	14.4%	19.6%	19.4%	15.7%	19.8%
Festival	8.1%	5.6%	6.1%	6.9%	6.3%	6.6%	6.3%
<b>Transportation</b>	<b>97.4%</b>	<b>95.9%</b>	<b>86.7%</b>	<b>89.7%</b>	<b>87.4%</b>	<b>90.9%</b>	<b>90.2%</b>
Trolley	8.4%	8.5%	7.2%	7.9%	6.3%	11.1%	5.8%
Public Bus	11.6%	11.1%	19.5%	13.8%	15.7%	20.4%	11.5%
Taxi / limousine	18.4%	14.4%	24.3%	19.6%	17.6%	22.1%	16.7%
Rental car	92.5%	88.1%	69.3%	78.6%	74.1%	74.2%	81.1%

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

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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>94.2%</b>	<b>93.2%</b>	<b>92.0%</b>	<b>85.8%</b>	<b>87.8%</b>	<b>95.8%</b>	<b>87.3%</b>
Helicopter / airplane tour	22.9%	10.0%	10.7%	11.1%	7.8%	15.7%	8.7%
Boat tour / submarine / whale watching	36.4%	34.3%	28.3%	27.1%	25.1%	34.5%	27.1%
Tour bus excursion	18.6%	11.7%	14.3%	10.1%	10.7%	22.0%	8.5%
Private limousine / van tour	7.0%	4.2%	6.6%	5.3%	6.2%	8.5%	4.7%
Self-guided	83.7%	82.4%	82.5%	76.5%	79.0%	82.3%	78.8%
<b>Recreation</b>	<b>96.3%</b>	<b>98.1%</b>	<b>94.3%</b>	<b>91.3%</b>	<b>85.0%</b>	<b>93.0%</b>	<b>91.4%</b>
Swimming / sunbathing / beach	88.6%	96.4%	92.8%	81.6%	70.0%	88.5%	82.4%
Surfing/body boarding	28.7%	53.0%	37.5%	18.6%	10.5%	25.0%	28.3%
Snorkeling / scuba diving	75.3%	72.2%	62.7%	49.3%	38.1%	60.6%	52.6%
Jet skiing / parasailing / windsurfing	12.2%	8.8%	10.6%	4.4%	2.0%	7.6%	5.4%
Golf	15.7%	20.4%	11.4%	15.5%	15.4%	8.6%	18.3%
Running / jogging / fitness walking	31.1%	44.0%	37.9%	38.8%	35.9%	38.5%	39.0%
Gym / health spa	11.8%	18.9%	13.9%	17.8%	11.2%	9.8%	17.2%
Backpacking / hiking / camping	38.5%	24.1%	35.3%	19.4%	9.5%	27.0%	18.6%
Sports event or tournament	1.0%	2.6%	5.0%	3.3%	2.8%	3.2%	3.2%
<b>Entertainment</b>	<b>88.5%</b>	<b>85.6%</b>	<b>86.2%</b>	<b>80.9%</b>	<b>78.8%</b>	<b>86.6%</b>	<b>81.2%</b>
Lunch / sunset / dinner / evening cruise	40.7%	34.9%	38.8%	31.3%	24.9%	42.1%	28.7%
Lounge act / stage show	37.2%	36.1%	29.6%	26.3%	24.6%	41.1%	25.5%
Nightclub / dancing / bar / karaoke	23.8%	14.1%	37.5%	19.8%	9.4%	19.2%	17.7%
Fine dining	80.1%	66.9%	53.6%	66.9%	66.8%	62.1%	66.5%
<b>Shopping</b>	<b>96.3%</b>	<b>98.3%</b>	<b>96.3%</b>	<b>94.1%</b>	<b>94.3%</b>	<b>96.4%</b>	<b>95.3%</b>
Department stores	49.5%	48.3%	51.7%	48.2%	50.3%	51.9%	48.5%
Designer boutiques	48.2%	52.8%	36.2%	44.7%	37.3%	43.2%	43.8%
Hotel stores	61.2%	54.5%	40.3%	45.9%	42.8%	47.6%	46.7%
Swap meet / flea markets	40.3%	34.4%	45.7%	32.1%	29.6%	43.1%	31.4%
Discount / outlet stores	51.3%	42.5%	39.7%	39.5%	42.1%	42.7%	40.9%
Supermarkets	76.8%	75.1%	66.1%	64.3%	64.4%	62.1%	69.2%
Convenience stores	59.9%	64.5%	65.4%	60.6%	52.8%	62.6%	59.3%
Duty free store	7.8%	6.4%	12.6%	6.0%	1.4%	9.5%	4.7%
<b>Culture</b>	<b>92.8%</b>	<b>82.2%</b>	<b>79.9%</b>	<b>72.2%</b>	<b>74.5%</b>	<b>87.8%</b>	<b>73.8%</b>
Historic site	62.8%	59.5%	61.3%	53.7%	57.2%	71.1%	53.4%
Museum / art gallery	34.8%	30.8%	23.0%	27.7%	35.3%	30.0%	30.2%
Polynesian show / luau	67.9%	53.5%	47.1%	37.2%	30.4%	63.9%	35.1%
Art / craft fair	14.2%	19.7%	16.1%	19.9%	21.2%	18.1%	20.0%
Festival	8.2%	6.5%	5.1%	6.0%	7.1%	7.1%	6.2%
<b>Transportation</b>	<b>94.7%</b>	<b>96.8%</b>	<b>85.4%</b>	<b>89.2%</b>	<b>88.6%</b>	<b>91.9%</b>	<b>90.1%</b>
Trolley	7.1%	8.7%	5.4%	7.3%	3.0%	8.4%	5.6%
Public Bus	8.3%	9.8%	18.1%	13.5%	12.1%	18.2%	11.1%
Taxi / limousine	10.9%	13.7%	23.2%	19.1%	13.7%	21.3%	15.2%
Rental car	94.7%	89.7%	68.2%	78.0%	79.6%	77.3%	81.4%

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

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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>98.3%</b>	<b>93.5%</b>	<b>93.9%</b>	<b>91.8%</b>	<b>93.4%</b>	<b>97.2%</b>	<b>89.7%</b>
Helicopter / airplane tour	37.0%	10.5%	12.9%	22.0%	14.5%	20.2%	14.9%
Boat tour / submarine / whale watching	47.2%	42.9%	29.9%	37.4%	32.1%	38.9%	34.1%
Tour bus excursion	18.4%	18.2%	19.2%	21.2%	31.9%	31.2%	16.2%
Private limousine / van tour	10.3%	5.3%	6.0%	8.1%	10.1%	8.2%	8.0%
Self-guided	89.3%	81.5%	88.7%	80.5%	73.1%	82.3%	78.0%
<b>Recreation</b>	<b>98.3%</b>	<b>98.3%</b>	<b>97.3%</b>	<b>90.6%</b>	<b>80.3%</b>	<b>92.2%</b>	<b>88.5%</b>
Swimming / sunbathing / beach	90.5%	96.7%	95.2%	85.2%	71.0%	87.1%	82.3%
Surfing/body boarding	14.3%	40.6%	30.0%	15.1%	7.3%	16.8%	21.4%
Snorkeling / scuba diving	70.2%	65.3%	63.0%	47.3%	27.2%	52.3%	44.1%
Jet skiing / parasailing / windsurfing	11.1%	10.9%	5.1%	4.4%	0.7%	4.8%	5.2%
Golf	14.0%	16.9%	10.5%	10.5%	11.6%	8.2%	16.0%
Running / jogging / fitness walking	37.0%	37.4%	36.4%	32.8%	32.8%	29.7%	38.8%
Gym / health spa	24.2%	21.9%	18.7%	15.9%	8.9%	11.7%	19.8%
Backpacking / hiking / camping	33.7%	23.8%	47.2%	24.5%	14.7%	30.2%	20.2%
Sports event or tournament	3.1%	3.9%	7.2%	3.1%	3.9%	3.9%	4.2%
<b>Entertainment</b>	<b>93.6%</b>	<b>82.7%</b>	<b>85.3%</b>	<b>85.0%</b>	<b>81.2%</b>	<b>87.5%</b>	<b>80.8%</b>
Lunch / sunset / dinner / evening cruise	53.2%	34.2%	37.2%	36.0%	33.4%	40.5%	32.2%
Lounge act / stage show	43.6%	31.8%	27.3%	32.5%	33.7%	39.4%	26.6%
Nightclub / dancing / bar / karaoke	19.7%	12.2%	36.0%	19.5%	10.4%	20.0%	15.4%
Fine dining	76.4%	63.4%	64.0%	66.5%	63.6%	64.5%	66.4%
<b>Shopping</b>	<b>96.7%</b>	<b>94.8%</b>	<b>96.7%</b>	<b>95.4%</b>	<b>93.7%</b>	<b>95.6%</b>	<b>94.5%</b>
Department stores	55.0%	56.6%	49.3%	50.4%	49.3%	52.1%	50.6%
Designer boutiques	53.1%	49.0%	47.7%	42.4%	36.5%	44.0%	42.5%
Hotel stores	62.0%	58.7%	50.4%	59.2%	50.1%	57.6%	53.2%
Swap meet / flea markets	32.7%	32.8%	43.0%	34.5%	29.3%	37.3%	30.1%
Discount / outlet stores	42.6%	44.6%	33.4%	43.4%	43.0%	40.0%	44.1%
Supermarkets	55.3%	63.4%	54.1%	53.2%	51.6%	51.8%	57.7%
Convenience stores	63.4%	57.1%	67.7%	61.4%	54.7%	61.2%	58.0%
Duty free store	11.0%	10.3%	4.6%	6.6%	6.8%	9.5%	5.3%
<b>Culture</b>	<b>80.1%</b>	<b>86.8%</b>	<b>81.9%</b>	<b>82.0%</b>	<b>84.8%</b>	<b>89.3%</b>	<b>78.1%</b>
Historic site	55.9%	70.7%	64.9%	61.7%	71.6%	73.4%	59.7%
Museum / art gallery	18.6%	30.2%	26.6%	26.5%	34.5%	26.8%	31.2%
Polynesian show / luau	68.8%	63.0%	51.9%	51.9%	50.5%	67.8%	42.1%
Art / craft fair	12.8%	17.1%	12.9%	19.4%	17.4%	14.4%	19.6%
Festival	7.7%	3.7%	7.2%	8.3%	5.3%	6.0%	6.7%
<b>Transportation</b>	<b>99.4%</b>	<b>94.2%</b>	<b>88.8%</b>	<b>90.2%</b>	<b>86.1%</b>	<b>90.1%</b>	<b>90.2%</b>
Trolley	9.0%	8.1%	9.4%	8.6%	10.8%	12.7%	6.1%
Public Bus	13.4%	14.4%	20.6%	14.2%	20.5%	21.6%	12.5%
Taxi / limousine	23.7%	16.0%	25.6%	20.3%	22.8%	22.6%	19.9%
Rental car	91.3%	84.5%	71.9%	79.3%	66.7%	72.3%	80.1%

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

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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>93.7%</b>	<b>93.3%</b>	<b>90.9%</b>	<b>93.4%</b>	<b>93.5%</b>	<b>94.5%</b>	<b>91.9%</b>
Helicopter / airplane tour	3.2%	4.0%	2.5%	5.1%	6.5%	4.0%	4.8%
Boat tour / submarine / whale watching	21.9%	19.1%	15.6%	17.5%	19.2%	22.4%	15.6%
Tour bus excursion	51.4%	47.0%	38.3%	43.8%	57.4%	57.9%	39.8%
Private limousine / van tour	18.1%	16.7%	12.6%	15.1%	15.5%	17.2%	14.5%
Self-guided	52.7%	55.8%	61.1%	58.5%	51.0%	47.8%	62.1%
<b>Recreation</b>	<b>89.5%</b>	<b>86.4%</b>	<b>89.2%</b>	<b>80.2%</b>	<b>72.1%</b>	<b>79.5%</b>	<b>85.6%</b>
Swimming / sunbathing / beach	80.3%	78.0%	78.0%	63.4%	52.3%	67.7%	71.6%
Surfing/body boarding	9.2%	8.3%	13.4%	6.2%	0.5%	6.9%	7.2%
Snorkeling / scuba diving	25.8%	19.6%	37.4%	13.5%	6.7%	19.3%	18.6%
Jet skiing / parasailing / windsurfing	10.2%	3.4%	11.3%	2.7%	1.2%	5.6%	4.1%
Golf	4.6%	7.1%	3.3%	12.3%	15.8%	4.4%	13.1%
Running / jogging / fitness walking	8.4%	14.6%	14.8%	17.6%	19.3%	12.8%	17.7%
Gym / health spa	8.9%	5.8%	11.3%	7.8%	3.2%	4.9%	8.3%
Backpacking / hiking / camping	7.2%	8.3%	8.9%	8.5%	7.6%	8.3%	8.0%
Sports event or tournament	1.0%	1.8%	2.8%	2.5%	3.6%	1.4%	3.1%
<b>Entertainment</b>	<b>93.9%</b>	<b>90.1%</b>	<b>92.2%</b>	<b>89.5%</b>	<b>83.4%</b>	<b>91.1%</b>	<b>87.8%</b>
Lunch / sunset / dinner / evening cruise	63.8%	49.0%	54.9%	49.9%	50.0%	60.9%	44.9%
Lounge act / stage show	23.4%	24.5%	15.9%	24.8%	26.0%	27.8%	20.0%
Nightclub / dancing / bar / karaoke	4.3%	3.5%	11.5%	8.7%	4.9%	5.0%	7.0%
Fine dining	76.2%	76.5%	83.2%	71.4%	62.1%	71.5%	74.8%
<b>Shopping</b>	<b>99.3%</b>	<b>99.4%</b>	<b>99.0%</b>	<b>98.0%</b>	<b>97.7%</b>	<b>98.4%</b>	<b>98.9%</b>
Department stores	64.9%	55.4%	64.1%	51.0%	38.2%	50.6%	55.4%
Designer boutiques	70.7%	65.6%	68.5%	60.3%	51.1%	60.4%	64.1%
Hotel stores	53.9%	57.2%	34.2%	46.8%	49.2%	50.6%	48.9%
Swap meet / flea markets	10.2%	11.7%	11.0%	13.4%	15.1%	11.1%	13.6%
Discount / outlet stores	34.2%	40.7%	40.8%	38.9%	33.9%	34.2%	41.3%
Supermarkets	43.9%	55.7%	55.2%	54.9%	44.8%	42.3%	59.2%
Convenience stores	87.1%	82.6%	89.1%	79.5%	69.9%	81.2%	80.4%
Duty free store	92.7%	85.5%	88.2%	83.3%	76.2%	85.8%	83.2%
<b>Culture</b>	<b>51.4%</b>	<b>57.2%</b>	<b>40.7%</b>	<b>58.4%</b>	<b>64.4%</b>	<b>60.2%</b>	<b>52.4%</b>
Historic site	25.7%	29.3%	18.9%	27.9%	33.0%	32.2%	24.3%
Museum / art gallery	12.2%	19.6%	9.9%	20.0%	21.9%	15.0%	20.2%
Polynesian show / luau	24.0%	26.7%	15.5%	27.2%	35.0%	32.2%	22.1%
Art / craft fair	1.1%	3.0%	0.7%	2.9%	2.9%	1.6%	3.0%
Festival	8.3%	5.9%	7.2%	7.7%	8.0%	6.1%	8.1%
<b>Transportation</b>	<b>96.8%</b>	<b>95.5%</b>	<b>95.1%</b>	<b>92.9%</b>	<b>89.2%</b>	<b>92.0%</b>	<b>95.1%</b>
Trolley	85.0%	68.5%	66.3%	58.7%	50.5%	69.5%	60.3%
Public Bus	15.7%	24.2%	29.5%	31.4%	31.5%	21.5%	31.3%
Taxi / limousine	48.1%	50.4%	47.7%	44.9%	47.3%	46.9%	48.8%
Rental car	12.6%	18.2%	16.0%	17.5%	12.5%	9.4%	21.1%

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

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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>96.2%</b>	<b>96.3%</b>	<b>94.1%</b>	<b>94.6%</b>	<b>93.8%</b>	<b>95.8%</b>	<b>94.1%</b>
Helicopter / airplane tour	23.8%	10.3%	10.2%	16.5%	8.6%	15.6%	9.8%
Boat tour / submarine / whale watching	39.8%	41.7%	37.6%	31.8%	27.1%	38.2%	31.0%
Tour bus excursion	38.5%	19.4%	18.3%	26.3%	28.6%	32.5%	19.0%
Private limousine / van tour	14.6%	5.0%	3.3%	9.3%	9.5%	10.8%	5.5%
Self-guided	83.1%	88.3%	86.1%	81.5%	76.1%	80.7%	83.6%
<b>Recreation</b>	<b>99.4%</b>	<b>99.1%</b>	<b>97.0%</b>	<b>93.3%</b>	<b>88.8%</b>	<b>92.8%</b>	<b>95.3%</b>
Swimming / sunbathing / beach	98.3%	96.6%	94.8%	89.2%	80.6%	88.7%	90.5%
Surfing/body boarding	34.0%	59.7%	45.5%	19.6%	10.3%	32.2%	29.8%
Snorkeling / scuba diving	71.7%	69.9%	63.8%	45.2%	27.4%	52.4%	48.2%
Jet skiing / parasailing / windsurfing	0.0%	4.6%	2.1%	2.4%	1.7%	2.4%	2.6%
Golf	7.0%	19.8%	10.8%	13.9%	20.0%	13.7%	17.9%
Running / jogging / fitness walking	32.6%	47.6%	39.9%	39.8%	44.8%	32.7%	49.9%
Gym / health spa	18.7%	15.0%	12.0%	11.5%	10.0%	10.9%	13.2%
Backpacking / hiking / camping	35.6%	24.9%	44.9%	18.5%	9.9%	27.6%	18.5%
Sports event or tournament	0.0%	5.0%	8.9%	5.7%	5.2%	5.0%	6.1%
<b>Entertainment</b>	<b>84.7%</b>	<b>80.0%</b>	<b>88.6%</b>	<b>78.7%</b>	<b>81.2%</b>	<b>83.4%</b>	<b>80.1%</b>
Lunch / sunset / dinner / evening cruise	46.4%	32.3%	41.2%	37.5%	38.3%	42.6%	33.7%
Lounge act / stage show	42.5%	42.7%	35.3%	31.9%	35.3%	41.8%	32.3%
Nightclub / dancing / bar / karaoke	22.6%	12.5%	33.8%	21.5%	13.1%	23.1%	16.0%
Fine dining	68.7%	58.4%	61.4%	61.3%	59.1%	61.2%	59.7%
<b>Shopping</b>	<b>96.7%</b>	<b>99.4%</b>	<b>96.9%</b>	<b>95.8%</b>	<b>95.7%</b>	<b>96.2%</b>	<b>97.2%</b>
Department stores	62.1%	67.6%	66.2%	66.6%	67.6%	67.4%	66.4%
Designer boutiques	50.0%	58.4%	45.9%	51.7%	40.8%	47.9%	50.2%
Hotel stores	62.3%	56.0%	55.6%	46.7%	49.1%	52.0%	51.2%
Swap meet / flea markets	40.3%	42.6%	51.3%	42.6%	32.4%	41.4%	40.7%
Discount / outlet stores	47.0%	50.1%	47.8%	44.3%	44.0%	41.4%	49.7%
Supermarkets	68.7%	79.8%	66.9%	65.1%	67.6%	61.7%	75.3%
Convenience stores	74.5%	75.1%	74.9%	72.0%	65.0%	69.1%	73.0%
Duty free store	18.9%	12.0%	19.7%	10.1%	10.1%	12.8%	12.1%
<b>Culture</b>	<b>91.1%</b>	<b>88.0%</b>	<b>80.0%</b>	<b>79.1%</b>	<b>82.4%</b>	<b>85.7%</b>	<b>80.6%</b>
Historic site	61.2%	66.6%	63.9%	58.6%	57.4%	69.5%	55.0%
Museum / art gallery	36.3%	36.9%	25.5%	28.7%	31.0%	28.8%	32.7%
Polynesian show / luau	60.4%	58.2%	48.3%	48.7%	51.2%	60.6%	45.9%
Art / craft fair	15.2%	24.6%	16.5%	21.0%	22.9%	18.3%	23.7%
Festival	2.5%	3.6%	5.9%	6.9%	6.5%	5.4%	5.9%
<b>Transportation</b>	<b>93.7%</b>	<b>97.3%</b>	<b>90.0%</b>	<b>92.0%</b>	<b>88.8%</b>	<b>91.6%</b>	<b>92.5%</b>
Trolley	19.2%	12.8%	14.6%	13.2%	17.0%	16.8%	13.1%
Public Bus	35.9%	19.7%	27.7%	27.2%	34.6%	26.9%	28.7%
Taxi / limousine	29.9%	27.5%	37.1%	37.8%	33.0%	37.0%	31.2%
Rental car	76.9%	85.1%	72.7%	69.4%	60.0%	69.6%	72.4%

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



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

Activity	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
<b>Sightseeing</b>	<b>94.9%</b>	<b>95.8%</b>	<b>94.9%</b>	<b>96.0%</b>	<b>95.6%</b>	<b>96.2%</b>	<b>94.0%</b>
Helicopter / airplane tour	30.1%	19.6%	13.5%	17.3%	18.7%	18.4%	18.5%
Boat tour / submarine / whale watching	40.0%	34.0%	34.7%	29.7%	27.7%	34.6%	24.3%
Tour bus excursion	39.7%	25.2%	28.6%	38.7%	52.1%	45.5%	22.3%
Private limousine / van tour	17.0%	21.4%	14.0%	15.9%	19.5%	17.4%	16.7%
Self-guided	68.2%	81.0%	80.0%	72.4%	58.0%	66.7%	80.5%
<b>Recreation</b>	<b>97.6%</b>	<b>97.1%</b>	<b>98.0%</b>	<b>95.1%</b>	<b>86.0%</b>	<b>93.2%</b>	<b>95.2%</b>
Swimming / sunbathing / beach	96.0%	94.2%	95.5%	91.2%	82.1%	90.1%	91.3%
Surfing/body boarding	21.5%	32.1%	34.1%	13.7%	6.0%	18.0%	19.6%
Snorkeling / scuba diving	48.2%	57.6%	53.1%	33.7%	20.8%	37.8%	39.1%
Jet skiing / parasailing / windsurfing	3.5%	3.3%	4.8%	3.8%	1.4%	2.8%	4.4%
Golf	6.1%	10.2%	4.0%	5.6%	5.3%	5.1%	7.2%
Running / jogging / fitness walking	12.8%	24.7%	25.5%	21.4%	18.2%	18.7%	26.4%
Gym / health spa	17.0%	13.7%	11.1%	9.2%	4.7%	9.1%	11.1%
Backpacking / hiking / camping	14.0%	13.5%	27.9%	17.4%	6.3%	15.0%	18.0%
Sports event or tournament	4.3%	5.1%	6.3%	5.3%	2.8%	3.2%	8.4%
<b>Entertainment</b>	<b>89.8%</b>	<b>76.8%</b>	<b>86.2%</b>	<b>83.0%</b>	<b>81.4%</b>	<b>84.2%</b>	<b>80.9%</b>
Lunch / sunset / dinner / evening cruise	41.2%	36.9%	50.5%	41.5%	39.7%	44.6%	36.6%
Lounge act / stage show	34.5%	26.8%	21.7%	29.9%	29.9%	30.2%	23.8%
Nightclub / dancing / bar / karaoke	33.3%	11.4%	43.2%	22.8%	11.8%	25.1%	20.6%
Fine dining	68.6%	53.0%	50.8%	53.9%	55.1%	54.0%	57.5%
<b>Shopping</b>	<b>97.6%</b>	<b>98.4%</b>	<b>98.8%</b>	<b>97.8%</b>	<b>96.4%</b>	<b>97.4%</b>	<b>98.4%</b>
Department stores	73.6%	71.3%	79.0%	76.8%	68.7%	73.9%	74.9%
Designer boutiques	47.2%	51.8%	41.1%	46.0%	32.4%	44.0%	37.6%
Hotel stores	66.0%	54.3%	40.9%	49.9%	51.6%	53.9%	42.5%
Swap meet / flea markets	18.1%	22.2%	29.4%	30.2%	27.8%	26.6%	29.3%
Discount / outlet stores	28.7%	41.6%	41.4%	36.7%	32.7%	31.9%	47.3%
Supermarkets	66.8%	71.9%	76.5%	71.6%	64.3%	67.5%	76.9%
Convenience stores	61.5%	53.6%	58.4%	52.2%	50.3%	55.5%	50.5%
Duty free store	13.7%	18.7%	21.4%	22.1%	15.8%	20.5%	15.5%
<b>Culture</b>	<b>79.6%</b>	<b>84.0%</b>	<b>79.3%</b>	<b>83.0%</b>	<b>84.1%</b>	<b>83.7%</b>	<b>78.7%</b>
Historic site	65.0%	66.4%	64.9%	68.3%	64.7%	67.7%	62.3%
Museum / art gallery	27.3%	25.7%	28.1%	31.4%	29.7%	28.3%	31.8%
Polynesian show / luau	47.5%	44.8%	36.6%	44.9%	45.2%	46.3%	36.7%
Art / craft fair	10.9%	15.2%	10.4%	14.0%	14.7%	12.0%	16.5%
Festival	7.6%	4.2%	9.7%	9.5%	7.5%	8.2%	8.5%
<b>Transportation</b>	<b>91.7%</b>	<b>93.5%</b>	<b>91.3%</b>	<b>94.5%</b>	<b>90.9%</b>	<b>92.1%</b>	<b>93.6%</b>
Trolley	20.6%	18.1%	18.5%	20.6%	24.2%	22.2%	17.7%
Public Bus	35.2%	38.5%	42.4%	39.3%	43.6%	42.9%	34.8%
Taxi / limousine	50.0%	35.8%	35.4%	36.4%	35.9%	40.1%	30.5%
Rental car	55.6%	62.0%	58.0%	58.3%	40.3%	48.6%	66.0%

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

## 6. TRIP PLANNING

## TRIP PLANNING

### Trip Planning and Booking Timetable:

Similar to previous years, results from the 2004 survey continue to show a shorter planning and booking window for Japanese respondents compared to visitors from the U.S. West, U.S. East, Canada and Europe (TABLES 6.1 TO 6.6).

**U.S. West Visitors:** The decision to take a vacation/pleasure trip and the choice of Hawaii as the destination is made at about the same time as in 2003 for U.S. West visitors. Close to 41 percent of the U.S. West respondents made the decision to choose Hawaii as a vacation destination seven months or more before their trip, 24.7 percent of the respondents took from 1 to 3 months to decide while 9.8 percent took less than one month to decide to visit the islands. Actual reservations and ticket purchases took place closer to the date of travel. More than half of the U.S. West visitors made their airline and lodging reservations and purchased their tickets within 3 months before their trips to Hawaii.

**U.S. East Visitors:** Close to 51 percent of the respondents from the U.S. East took seven months or more to make the decision to take a vacation/pleasure trip and to select Hawaii as the destination, 17.8 percent of the visitors took from 1 to 3 months while 7.6 percent took less than one month to decide on Hawaii. Over 46 percent made their airline reservations, lodging reservations and purchased their tickets within three months before coming to Hawaii.

**Japanese Visitors:** In contrast to their U.S. counterparts, over half of the Japanese respondents decided within 3 months or less to take vacation/pleasure trip and to come to Hawaii. Over 84 percent made their airline, lodging and car reservations and purchased their tickets and tour packages within three months prior to their trip. Many of the remaining Japanese respondents took between 4 to 6 months to accomplish these tasks.

**Canadian Visitors:** Similar to U.S. West respondents, about 42 percent of the Canadian visitors surveyed took seven months or more to make the decision to take a vacation/pleasure trip and to select Hawaii as the destination while 25.6 percent took from 1 to 3 months to decide on Hawaii. Over half of the Canadian respondents made their airline reservations, lodging reservations, purchased their plane tickets and made car reservations three months or less before their trip.

**European Visitors:** Close to half of the European respondents took seven months or more to make the decision to take a vacation/pleasure trip and to pick Hawaii as the destination while 18.6 percent of the visitors took 1 to 3 months. About 40 percent of the European respondents made their airline and lodging reservations and purchased their tickets, while over 70 percent made car reservations and purchased tour packages within three months before their departure date.

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

Most of the survey respondents in 2004 have already made a decision regarding which islands to visit before arriving in Hawaii. Oahu was the most visited island among the respondents, followed closely by Maui. More visitors chose to visit Molokai and Lanai after arriving in the State compared with other islands (TABLE 6.7).

**U.S. West Visitors:** The majority of the U.S. West (94.9%) respondents have decided to visit the island of Oahu before their arrival to the State while only a small percentage (5.1%) chose Oahu after they were in Hawaii. Just above 92 percent selected Maui, Kauai, and/or the Big Island. Close to half chose Molokai and/or Lanai before coming to the state.

**U.S. East Visitors:** Similarly, nearly 92 percent all of the U.S. East visitors surveyed selected Oahu, Maui, Kauai and/or the Big Island prior to their actual visit. Over half of the respondents who visited Molokai and 59.2 percent of those who visited Lanai decided to do so after arriving in the islands.

**Japanese Visitors:** In comparison to visitors from other markets, a higher percentage of the Japanese respondents decided on Oahu (98.2%) before coming to the state, while close to 90 percent decided on the Big Island and/or Maui before their arrivals. Compared to their U.S. counterparts, a lower percentage of the Japanese visitors surveyed made up their minds about visiting Kauai and Molokai but a greater number decided on Lanai prior to their arrival.

**Canadian Visitors:** Over 89 percent of the Canadian visitors surveyed chose to visit Oahu, Maui, Kauai and the Big Island before arriving to the state.

**European Visitors:** Just above 95 percent of Europeans decided to go to Oahu before coming to the state. The majority decided to visit Kauai, Maui, the Big Island and/or Lanai (70.3%) before their arrivals to Hawaii.

### **Internet Use:**

The usage of the Internet as a trip-planning tool has climbed in popularity with U.S., Canadian and European visitors over the years. Internet usage for trip planning among Japanese visitors is still lower compared to the other visitor groups (TABLES 6.8 TO 6.10).

**U.S. West Visitors:** Close to 91 percent of the U.S. West visitors surveyed were Internet users and 63.9 percent used the Internet to plan their recent trip. The most common Internet searches by U.S. West respondents in trip planning were making airline reservations (67.6%). Over 40 percent used the Internet to estimate costs, make rental car reservations, find things to do, select hotels, make hotel reservations, find maps and directions and find recreational activities.

**U.S. East Visitors:** Similarly, about 91 percent of the U.S. East survey respondents used the Internet and 67.5 percent used the Internet to plan their recent trip. Over half of the

visitors survey went on line to make airline reservations and find things to do while over 40 percent researched cost estimate, hotel selection and hotel and car reservations.

**Japanese Visitors:** In contrast 66.3 percent of the Japanese visitors surveyed were Internet users and only 45.8 percent used the Internet to plan their recent trip. The most popular searches were for information on Hawaii hotels (62.9%) and searches on shopping places (40.9%) while about 38 percent went on line to search for things to do, sightseeing places and recreation activities.

**Canadian Visitors:** Close to 88 percent of the Canadian visitors surveyed used the Internet and 69.5 percent planned their recent trip using the Internet. Close to half searched the web to find things to do, for information on hotel selection, to estimating costs and make airline reservations (47.6%).

**European Visitors:** Nearly 83 percent of the European respondents were Internet users and 62.8 percent used the Internet to plan their recent trip. Similar to U.S. East and Canadian respondents, the most popular searches by European visitors in their trip planning were to find things to do (56.5%), followed by searches for hotel selections (51.6%) while over 40 percent searched for cost estimates, maps and directions and sightseeing places.

**TABLE 6.1 Trip Planning & Booking Timetable: U.S. Total**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	90.7%	8.2%	22.1%	25.6%	14.0%	15.1%	15.0%	100.0%
Decide to visit Hawaii	93.4%	9.0%	22.0%	24.3%	14.0%	14.6%	16.2%	100.0%
Decide on which islands to visit	91.5%	11.5%	24.7%	24.9%	14.0%	13.2%	11.7%	100.0%
Set date for the trip	93.9%	11.8%	29.9%	26.6%	13.9%	11.2%	6.6%	100.0%
Airline reservations	94.4%	14.8%	39.6%	26.9%	11.4%	5.8%	1.5%	100.0%
Purchase tickets	93.5%	15.6%	41.1%	25.9%	10.5%	5.5%	1.4%	100.0%
Accommodation reservations	88.7%	14.6%	36.6%	25.2%	11.2%	8.7%	3.7%	100.0%
Rental car reservations	76.3%	29.8%	37.7%	20.0%	7.6%	4.2%	0.6%	100.0%
Purchase tour or attraction packages	53.9%	66.2%	19.6%	8.0%	3.4%	1.6%	1.3%	100.0%

**TABLE 6.2 Trip Planning & Booking Timetable: U.S. West**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	90.8%	9.2%	24.2%	27.3%	12.8%	14.0%	12.5%	100.0%
Decide to visit Hawaii	93.7%	9.8%	24.7%	24.7%	13.0%	13.6%	14.3%	100.0%
Decide on which islands to visit	92.8%	12.0%	26.2%	25.4%	13.2%	12.4%	10.8%	100.0%
Set date for the trip	94.7%	13.0%	32.8%	26.9%	12.2%	9.5%	5.6%	100.0%
Airline reservations	95.5%	16.6%	41.4%	27.0%	9.7%	4.3%	1.0%	100.0%
Purchase tickets	94.8%	17.6%	42.7%	26.0%	9.0%	3.9%	0.8%	100.0%
Accommodation reservations	89.1%	15.8%	38.4%	24.8%	9.6%	7.6%	3.8%	100.0%
Rental car reservations	78.6%	29.1%	39.1%	20.6%	7.0%	3.8%	0.4%	100.0%
Purchase tour or attraction packages	48.8%	68.6%	19.2%	6.3%	3.0%	1.2%	1.6%	100.0%

**TABLE 6.3 Trip Planning & Booking Timetable: U.S. East**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	93.4%	6.5%	18.9%	22.9%	15.9%	16.9%	18.8%	100.0%
Decide to visit Hawaii	95.9%	7.6%	17.8%	23.6%	15.8%	16.3%	18.9%	100.0%
Decide on which islands to visit	92.4%	10.3%	22.1%	23.9%	15.6%	14.7%	13.2%	100.0%
Set date for the trip	95.7%	9.8%	25.1%	26.1%	16.7%	14.3%	8.0%	100.0%
Airline reservations	95.7%	11.8%	36.1%	27.1%	14.2%	8.3%	2.5%	100.0%
Purchase tickets	94.6%	12.3%	37.9%	26.2%	12.9%	8.1%	2.4%	100.0%
Accommodation reservations	91.1%	12.7%	33.3%	25.7%	13.8%	10.6%	3.8%	100.0%
Rental car reservations	75.4%	30.6%	35.0%	19.6%	8.6%	5.2%	1.0%	100.0%
Purchase tour or attraction packages	63.7%	63.1%	19.8%	10.1%	4.0%	2.0%	1.0%	100.0%

**TABLE 6.4 Trip Planning & Booking Timetable: Japan**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	94.3%	10.9%	45.1%	25.1%	6.0%	5.4%	7.5%	100.0%
Decide to visit Hawaii	95.0%	14.1%	47.3%	22.2%	4.7%	5.0%	6.7%	100.0%
Decide on which islands to visit	92.7%	19.2%	48.9%	20.2%	4.1%	3.6%	4.1%	100.0%
Set date for the trip	93.6%	21.0%	55.9%	16.5%	3.1%	2.1%	1.4%	100.0%
Airline reservations	90.3%	25.0%	60.2%	12.1%	1.6%	0.8%	0.3%	100.0%
Purchase tickets	86.0%	32.7%	55.7%	9.4%	1.3%	0.6%	0.4%	100.0%
Accommodation reservations	87.1%	26.4%	58.0%	12.1%	2.2%	1.0%	0.3%	100.0%
Rental car reservations	20.6%	58.9%	31.5%	6.4%	0.5%	0.3%	2.4%	100.0%
Purchase tour or attraction packages	60.3%	70.9%	24.6%	3.6%	0.3%	0.2%	0.3%	100.0%

**TABLE 6.5 Trip Planning & Booking Timetable: Canada**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	94.2%	7.2%	25.4%	23.4%	14.5%	15.8%	13.7%	100.0%
Decide to visit Hawaii	95.7%	8.3%	25.6%	23.8%	14.2%	14.4%	13.6%	100.0%
Decide on which islands to visit	93.5%	12.0%	27.3%	23.7%	14.0%	12.9%	10.1%	100.0%
Set date for the trip	95.5%	10.2%	33.5%	24.9%	14.2%	11.0%	6.2%	100.0%
Airline reservations	95.4%	12.4%	41.3%	27.4%	10.5%	6.3%	2.1%	100.0%
Purchase tickets	95.2%	13.9%	42.0%	26.2%	10.1%	5.9%	1.9%	100.0%
Accommodation reservations	90.9%	14.2%	38.7%	24.1%	10.7%	8.0%	4.3%	100.0%
Rental car reservations	69.6%	38.0%	38.5%	15.0%	4.8%	2.4%	1.4%	100.0%
Purchase tour or attraction packages	52.3%	74.5%	14.9%	5.1%	2.0%	1.2%	2.2%	100.0%

**TABLE 6.6 Trip Planning & Booking Timetable: Europe**

Planning	% of Visitors who Responded to the Question	Time before departure						Total
		< 1 Month	1 - 3 mos	4 - 6 mos	7 - 9 mos	10 - 12 mos	> 12 mos	
		(Percent of those who responded to the question)						
Decide to take vacation / pleasure trip	93.1%	6.5%	17.0%	25.7%	16.5%	17.4%	17.0%	100.0%
Decide to visit Hawaii	94.2%	7.2%	18.6%	26.4%	17.0%	15.1%	15.7%	100.0%
Decide on which islands to visit	91.5%	11.1%	21.9%	26.5%	15.9%	14.1%	10.5%	100.0%
Set date for the trip	94.3%	9.5%	24.1%	27.0%	17.2%	14.3%	7.9%	100.0%
Airline reservations	94.1%	11.6%	27.7%	29.8%	15.7%	11.2%	3.9%	100.0%
Purchase tickets	92.9%	14.8%	29.4%	28.5%	13.9%	9.7%	3.7%	100.0%
Accommodation reservations	89.2%	15.5%	27.9%	27.6%	13.9%	10.9%	4.2%	100.0%
Rental car reservations	52.1%	42.2%	28.5%	17.6%	5.7%	4.1%	2.0%	100.0%
Purchase tour or attraction packages	54.1%	72.1%	10.9%	8.7%	3.6%	2.6%	1.9%	100.0%

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

Time of Decision	Total U.S.	U.S. West	U.S. East	Japan	Canada	Europe
<b>Oahu</b>						
Decide before arrival in Hawaii	96.2%	94.9%	97.8%	98.2%	95.0%	95.2%
Decide after arrival in Hawaii	3.8%	5.1%	2.2%	1.8%	5.0%	4.8%
<b>Maui</b>						
Decide before arrival in Hawaii	95.3%	94.4%	96.0%	90.3%	95.4%	86.2%
Decide after arrival in Hawaii	4.7%	5.6%	4.0%	9.7%	4.6%	13.8%
<b>Molokai</b>						
Decide before arrival in Hawaii	52.7%	51.5%	52.7%	49.7%	65.7%	57.0%
Decide after arrival in Hawaii	47.3%	48.5%	47.3%	50.3%	34.3%	43.0%
<b>Lanai</b>						
Decide before arrival in Hawaii	54.9%	47.8%	59.2%	76.6%	66.3%	70.3%
Decide after arrival in Hawaii	45.1%	52.2%	40.8%	23.4%	33.7%	29.7%
<b>Big Island</b>						
Decide before arrival in Hawaii	92.1%	92.8%	91.4%	93.4%	89.1%	85.7%
Decide after arrival in Hawaii	7.9%	7.2%	8.6%	6.6%	10.9%	14.3%
<b>Kauai</b>						
Decide before arrival in Hawaii	94.1%	93.3%	94.8%	77.7%	92.8%	89.2%
Decide after arrival in Hawaii	5.9%	6.7%	5.2%	22.3%	7.2%	10.8%

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

Information Source	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Travel agents	32.7%	30.7%	36.0%	68.8%	44.0%	54.7%
Internet	65.4%	63.9%	67.5%	45.8%	69.5%	62.8%
Personal experience	43.5%	48.1%	36.3%	43.1%	42.9%	23.5%
Wholesalers	11.6%	11.1%	12.2%	16.9%	8.0%	19.0%
Friends / relatives	39.9%	37.2%	43.9%	28.6%	40.4%	30.5%
Magazines	11.4%	10.8%	12.5%	42.4%	10.9%	13.4%
Books	20.8%	17.7%	25.6%	40.4%	24.7%	37.6%
Hotels / resorts	22.9%	21.9%	24.3%	7.2%	17.8%	14.8%
Airlines	28.4%	28.9%	27.3%	8.7%	22.3%	14.9%
Hawaii Visitors & Convention Bureau	10.5%	8.0%	14.2%	7.8%	12.8%	8.1%
Newspapers	2.9%	3.0%	2.7%	2.7%	3.8%	4.2%

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



**TABLE 6.9 Internet Usage for Trip Planning and Booking  
(% of Respondents Who Used Internet, by MMA)**

Purpose	Total U.S.	U.S. West	U.S. East	Japan	Canada	Europe
Find things to do	51.0%	45.5%	59.4%	38.5%	54.8%	56.5%
Estimate costs	48.4%	49.4%	47.1%	15.3%	51.4%	43.3%
Hotel selection	45.2%	44.1%	47.0%	62.9%	51.8%	51.6%
Make restaurant reservations	20.5%	19.3%	22.2%	31.0%	17.6%	16.3%
Find recreational activities	37.3%	35.2%	40.5%	34.9%	39.0%	26.4%
Maps and directions	39.3%	39.6%	39.0%	27.6%	40.0%	42.4%
Locate sightseeing places	27.9%	24.0%	33.6%	37.0%	35.0%	40.2%
Make airline reservations	64.4%	67.6%	59.9%	17.6%	47.6%	30.8%
Hotel Reservation	42.8%	42.6%	43.1%	21.7%	38.7%	35.9%
Rental Car Reservation	44.4%	46.0%	41.8%	9.9%	36.8%	20.6%
Locate shopping places	7.8%	7.5%	8.4%	40.9%	11.8%	11.5%
Find evening activities	14.1%	13.1%	15.6%	5.5%	13.0%	11.0%

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

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

Internet usage	Total U.S.	U.S. West	U.S. East	Japan	Canada	Europe
Used internet	90.8%	90.8%	90.9%	66.3%	87.7%	82.8%
Never used internet	9.2%	9.2%	9.1%	33.7%	12.3%	17.2%

**TABLE 6.11 Usage of Travel Agent For Trip Planning and Booking  
(% of Respondents Who Used Travel Agents, by MMA)**

Travel agent usage	Total U.S.	U.S. West	U.S. East	Japan	Canada	Europe
Help in deciding travel to Hawaii	9.7%	7.9%	12.0%	10.5%	10.0%	13.7%
Help in choosing the airline	48.1%	47.1%	49.2%	40.5%	53.1%	50.8%
Help in planning activities	17.2%	12.4%	24.2%	33.3%	12.8%	12.9%
Make airline reservations	78.4%	79.2%	76.9%	75.7%	81.8%	87.5%
Make hotel arrangements	65.5%	63.2%	68.5%	79.6%	51.1%	67.7%
Make rental car reservations	53.5%	58.3%	46.9%	4.8%	26.9%	29.1%
Help in purchasing tour packages	17.3%	15.0%	20.6%	35.3%	10.8%	11.5%

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

## 7. SAFETY ISSUES AND OTHER NUISANCE



## 7. SAFETY ISSUES AND OTHER NUISANCE

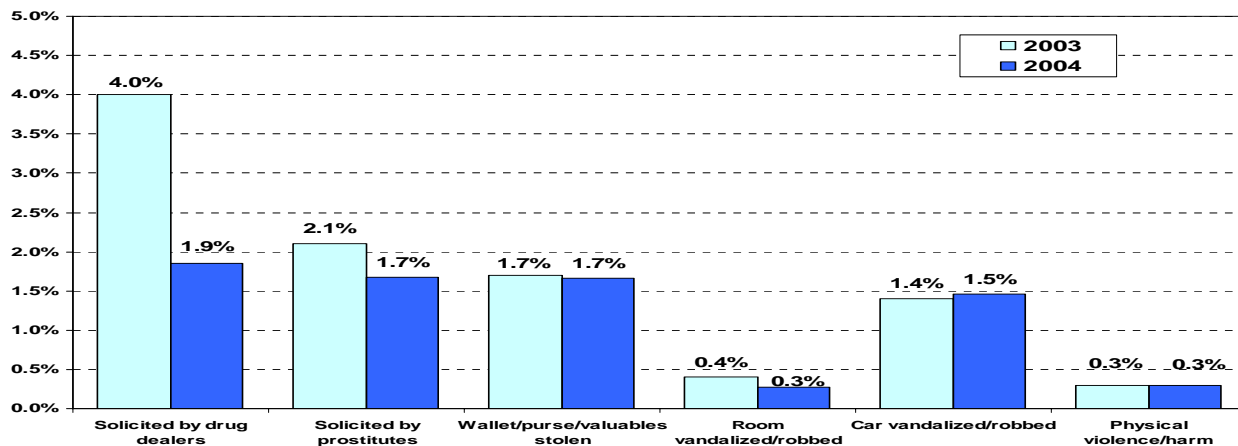
The 2004 survey asked U.S., Japanese, Canadian and European visitors about safety and other nuisance issues they encountered during their recent trips to the islands (TABLES 7.1 TO 7.7). Results show that mostly all of the U.S. West (92.6) U.S. East (94%), Japanese (96.1%) Canadian (93.5%) and European (93.6%) visitors surveyed experienced no problems while on the islands.

Of the small number of visitors who reported problems, being solicited by drug dealers was the issue most mentioned by U.S. and Canadian respondents while for European respondents it was solicitation by prostitutes.

The second most mentioned safety issue by U.S. visitors was a tie between solicitation by prostitutes and wallet/purses/valuables stolen. For Canadian visitors it was solicitation by prostitutes and cars vandalized/robbed, while for European visitors it was solicitation by drug dealers.

The biggest issue among Japanese respondents in 2004 was having their wallet/purse/valuables stolen, reported by 1.3 percent of the respondents.

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



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

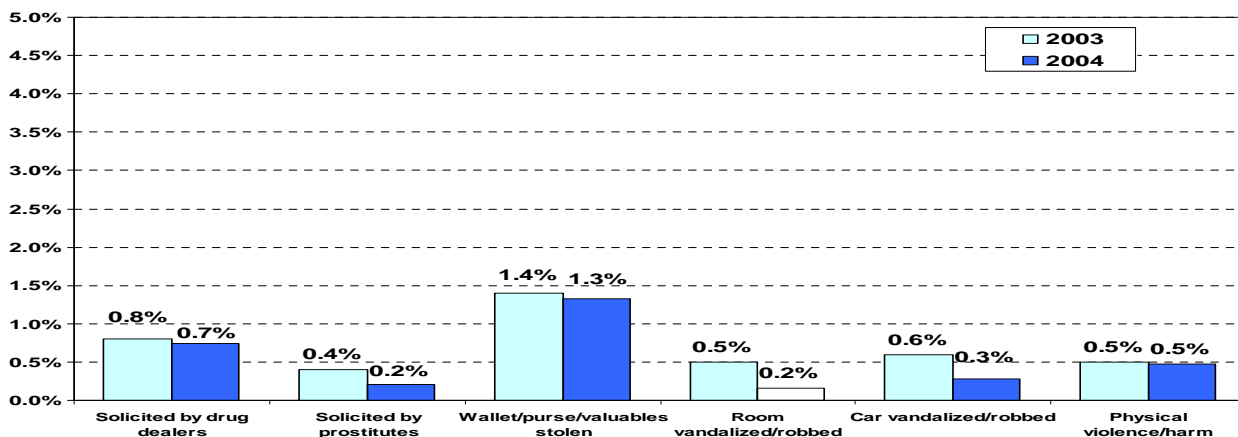


Figure 28: Percentage of Visitors Who Encountered Safety Issues: Canadian Visitors

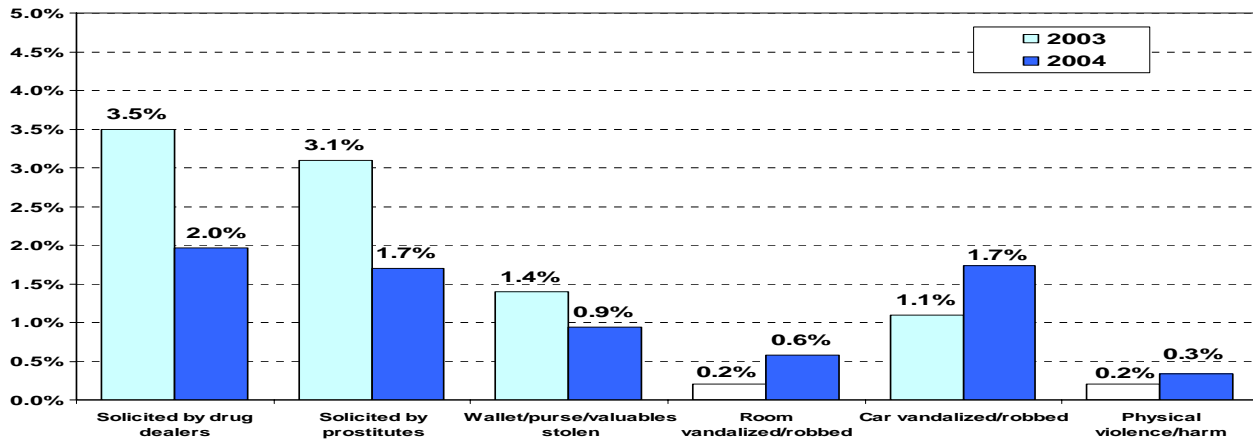
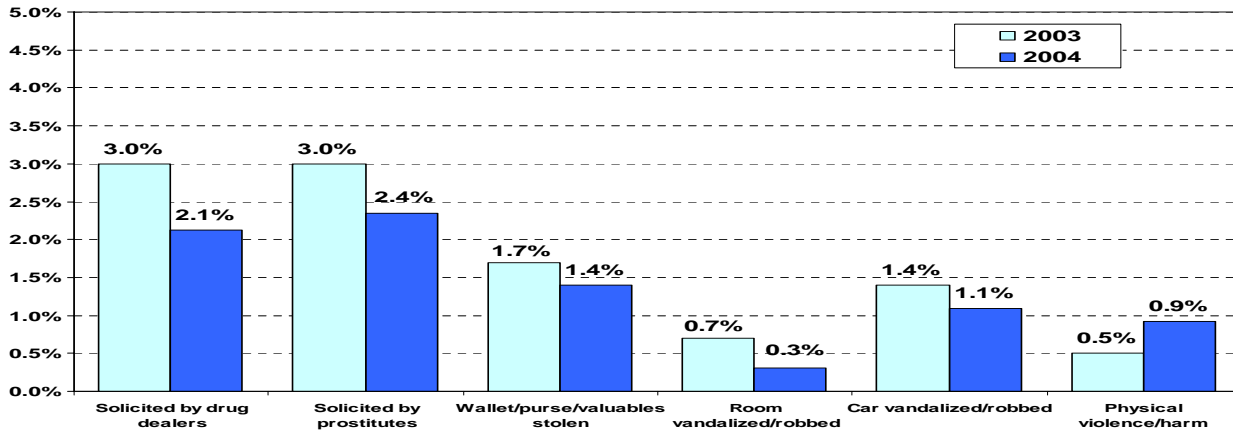


Figure 29: Percentage of Visitors Who Encountered Safety Issues: European Visitors



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

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
No problems	93.2%	92.6%	94.0%	96.1%	93.5%	93.6%
Safety Issues:						
Solicited by drug dealers	1.9%	2.0%	1.5%	0.7%	2.0%	2.1%
Solicited by prostitutes	1.7%	1.6%	1.7%	0.2%	1.7%	2.4%
Wallet / purse / valuables stolen	1.7%	1.9%	1.4%	1.3%	0.9%	1.4%
Room vandalized / robbed	0.3%	0.4%	0.1%	0.2%	0.6%	0.3%
Car vandalized / robbed	1.5%	1.6%	1.2%	0.3%	1.7%	1.1%
Physical violence / harm	0.3%	0.2%	0.5%	0.5%	0.3%	0.9%
Other Nuisance:						
Parking ticket	1.2%	1.2%	1.2%	1.3%	1.8%	0.7%

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First	Timers	Repeat Visitors
No problems	92.8%	92.7%	90.2%	92.6%	95.5%	94.3%		92.9%	93.3%
Safety Issues:									
Solicited by drug dealers	5.5%	2.0%	2.8%	2.0%	0.5%	2.8%		2.1%	1.7%
Solicited by prostitutes	1.9%	1.7%	3.8%	1.8%	0.6%	1.2%		2.0%	1.5%
Wallet / purse / valuables stolen	2.0%	1.7%	1.6%	1.8%	1.6%	0.0%		1.9%	1.6%
Room vandalized / robbed	0.7%	0.3%	0.5%	0.0%	0.4%	0.0%		0.2%	0.3%
Car vandalized / robbed	1.4%	1.6%	1.2%	1.4%	1.6%	0.6%		1.8%	1.3%
Physical violence / harm	0.7%	0.0%	0.4%	0.3%	0.3%	1.1%		0.4%	0.2%
Other Nuisance:									
Parking ticket	1.2%	1.8%	0.5%	1.6%	0.9%	0.0%		0.9%	1.4%

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First	Timers	Repeat Visitors
No problems	91.1%	91.7%	90.2%	92.7%	94.4%	93.7%	92.5%		92.7%
Safety Issues:									
Solicited by drug dealers	7.6%	2.2%	3.0%	1.8%	0.8%	4.4%	3.0%		1.7%
Solicited by prostitutes	3.6%	1.2%	4.2%	1.5%	0.6%	1.9%	1.8%		1.6%
Wallet / purse / valuables stolen	3.8%	2.0%	1.8%	2.1%	1.8%	0.0%	2.9%		1.6%
Room vandalized / robbed	1.8%	0.5%	0.5%	0.0%	0.6%	0.0%	0.2%		0.4%
Car vandalized / robbed	1.8%	1.8%	1.6%	1.4%	2.0%	0.0%	2.5%		1.4%
Physical violence / harm	1.8%	0.0%	0.0%	0.4%	0.0%	0.0%	0.2%		0.1%
Other Nuisance:									
Parking ticket	2.9%	1.8%	0.0%	1.3%	1.2%	0.0%	0.5%		1.5%

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First	Timers	Repeat Visitors
No problems	94.1%	94.0%	90.1%	92.6%	96.8%	95.2%	93.3%		94.7%
Safety Issues:									
Solicited by drug dealers	4.0%	1.5%	2.5%	2.2%	0.0%	0.0%	1.3%		1.7%
Solicited by prostitutes	0.8%	2.8%	2.9%	2.1%	0.5%	0.0%	2.1%		1.3%
Wallet / purse / valuables stolen	0.8%	1.7%	1.2%	1.3%	1.6%	0.0%	1.1%		1.7%
Room vandalized / robbed	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%		0.0%
Car vandalized / robbed	1.1%	1.4%	0.6%	1.5%	1.1%	1.6%	1.3%		1.1%
Physical violence / harm	0.0%	0.0%	1.1%	0.2%	0.7%	3.2%	0.6%		0.4%
Other Nuisance:									
Parking ticket	0.0%	1.7%	1.7%	2.1%	0.3%	0.0%	1.4%		1.1%

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First	Timers	Repeat Visitors
No problems	96.5%	96.7%	93.0%	95.7%	97.5%	98.2%	97.5%		95.0%
Safety Issues:									
Solicited by drug dealers	0.2%	0.8%	1.0%	1.2%	0.5%	0.0%	0.6%		0.9%
Solicited by prostitutes	0.0%	0.1%	0.5%	0.4%	0.1%	0.0%	0.1%		0.3%
Wallet / purse / valuables stolen	0.5%	1.6%	2.1%	1.4%	0.8%	1.8%	0.9%		1.7%
Room vandalized / robbed	0.0%	0.3%	0.0%	0.0%	0.4%	0.0%	0.2%		0.2%
Car vandalized / robbed	0.0%	0.4%	0.1%	0.5%	0.2%	0.0%	0.0%		0.5%
Physical violence / harm	1.2%	0.2%	0.3%	0.7%	0.5%	0.0%	0.3%		0.6%
Other Nuisance:									
Parking ticket	2.5%	0.4%	4.1%	0.9%	0.2%	0.0%	1.0%		1.5%

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First Timers	Repeat Visitors	
No problems	90.2%	95.4%	85.4%	93.8%	96.9%	90.9%	94.8%	92.6%	
Safety Issues:									
Solicited by drug dealers	4.2%	0.6%	7.2%	1.5%	0.3%	3.2%	2.2%	1.8%	
Solicited by prostitutes	3.9%	0.4%	4.2%	2.2%	0.7%	1.7%	1.8%	1.6%	
Wallet / purse / valuables stolen	0.0%	1.3%	1.1%	1.0%	0.8%	0.0%	1.0%	0.9%	
Room vandalized / robbed	0.0%	1.3%	0.9%	0.0%	0.5%	0.0%	0.4%	0.7%	
Car vandalized / robbed	1.7%	3.1%	0.9%	2.0%	0.9%	0.0%	1.3%	2.1%	
Physical violence / harm	0.0%	0.4%	0.7%	0.2%	0.3%	0.0%	0.6%	0.1%	
Other Nuisance:									
Parking ticket	1.4%	1.3%	2.6%	1.5%	1.8%	4.2%	1.5%	2.0%	

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

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

	Lifestyle / Lifestage Segments						Visitation Status		
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	Others	First Timers	Repeat Visitors	
No problems	97.0%	94.2%	87.4%	93.5%	97.0%	89.7%	93.9%	92.6%	
Safety Issues:									
Solicited by drug dealers	1.9%	0.9%	6.3%	1.5%	0.5%	0.0%	2.2%	1.8%	
Solicited by prostitutes	0.4%	1.1%	5.4%	2.4%	1.5%	0.0%	2.4%	2.2%	
Wallet / purse / valuables stolen	0.4%	1.6%	1.9%	2.0%	0.3%	4.4%	1.2%	2.0%	
Room vandalized / robbed	0.4%	0.0%	0.6%	0.5%	0.0%	0.0%	0.4%	0.2%	
Car vandalized / robbed	0.0%	0.0%	0.9%	2.3%	0.6%	0.0%	0.6%	2.2%	
Physical violence / harm	0.0%	1.6%	2.1%	0.6%	0.0%	5.8%	1.0%	0.6%	
Other Nuisance:									
Parking ticket	0.3%	1.5%	1.3%	0.8%	0.2%	0.0%	0.6%	1.0%	

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

## 8. VISITOR PROFILE



## 8. VISITORS PROFILE

### Primary Purpose of Trips: (TABLE 8.13)

**U.S. Visitors:** Over 65 percent of the U.S. West and U.S. East visitors surveyed in 2004 listed vacation as the primary reason for coming to the islands. Other primary reasons for U.S. respondents to visit Hawaii were to visit friends/relatives, to attend business meetings/conduct business, to attend a convention/conference/seminar, to attend/participate weddings and to honeymoon.

**Japanese Visitors:** Vacation was the primary reason for 69.3 percent of the Japanese respondents to be in Hawaii. Close to 8 percent of Japanese respondents listed attending/participating in weddings and to honeymoon while about 3 percent listed getting married as other primary reasons for visiting Hawaii.

**Canadian Visitors:** Nearly 78 percent of the Canadian respondents indicated that vacation was their main reason for coming to the islands. Close to 5 percent came to visit friends/relatives while about 4 percent attended a convention/conference/seminar or got married.

**European Visitors:** Vacation was also the primary reason for 73.5 percent of the European respondents to be in Hawaii. Close to 5 percent visited friends/relatives, 3.9 percent attended a convention/conference/seminar.

### Secondary Purpose of Trips (TABLE 8.20):

**U.S. Visitors:** About 42.8 percent of U.S. West and 53.9 percent of U.S. East surveyed in 2004 listed vacation as their secondary purpose of trip. Other secondary reasons to come to Hawaii were to visit friends/relatives (29.1% U.S. West, 18.4% U.S. East), to attend business meetings/conduct business (8.1% U.S. West and 5.9% U.S. East).

**Japanese Visitors:** Vacation was also the main secondary purpose of trip among 42 percent of the Japanese respondents. In addition, close to 10 percent visited friends/relatives, honeymooned and/or attended/participated in weddings.

**Canadian Visitors:** Close to 50 percent of the Canadian respondents indicated that vacation was their secondary purpose for coming to Hawaii while 23.6 percent visited friends/relatives. Over 3 percent attended a business meeting/conduct business and/or attended conventions/conferences/seminars.

**European Visitors:** Similarly, vacation was the secondary purpose of trip for 54.7 percent of the European visitors surveyed. In addition, 18.7 percent visited friends/relatives and close to 3 percent came to honeymoon, attended/participated in a sporting event and/or attended participated in a cultural event.

### **Travel Companions (TABLE 8.8):**

**U.S. Visitors:** The majority of the U.S. West and U.S. East respondents in 2004 traveled to the islands with their spouses (44.8% and 55.5%), with children (23.9% and 17.8%) and with other family members (23.4% and 20.9%). Additionally, close to 22 percent of U.S. West and U.S. East visitors came with friends/business associates while about 10 percent of U.S. West and U.S. East visitors came alone.

**Japanese Visitors:** About 49 percent of the Japanese visitors surveyed came with their spouses, 34 percent were with children, and 14.1 percent were with other family members. Compared to their U.S. counterparts, a higher number of Japanese visitors surveyed traveled with friends or business associates (24.8%) while fewer came by themselves.

**Canadian Visitors:** A larger percentage of the Canadian visitors surveyed came with their spouses (51.9%) compared to respondents from the U.S. West, Japan and Europe. About 20 percent were with children, with other family members and/or with friends or business associates.

**European Visitors:** Close to 48 percent of the European respondents traveled to Hawaii with their spouses, while nearly 11 percent came with children, and/or with other family members. Another 19 percent traveled with friends or associates. A higher percentage of European visitors surveyed traveled with their girlfriends/boyfriends (12.6%) compared to respondents from the other markets.

### **Income Level (TABLES 8.2 TO 8.7):**

**U.S. Visitors:** Survey results for 2004 showed that 18.5 percent of U.S. West and 20.2 percent of U.S. East respondents reported annual household income of less than \$50,000. U.S. West and U.S. East visitors with household income from \$50,000 to \$99,999 comprised the largest groups of respondents at close to 37 percent. In addition, 22.7 percent of U.S. West and 18.9 percent of U.S. East visitors reported annual household income of \$150,000 or more.

**Japanese Visitors:** About 38 percent of the visitors from Japan reported annual household income of less than 5 million Japanese yen (equivalent to \$46,095). Respondents with income between 5 million and 10 million Japanese yen accounted for 37.7 percent of Japanese visitors surveyed. About 7.8 percent of the respondents who visited Hawaii reported annual household income of 15 million Japanese yen or more.

**Canadian Visitors:** About 28 percent of the Canadian visitors surveyed reported annual household income of less than \$50,000. Canadians with income between \$50,000 to \$99,999 comprised the largest group (37.2%) while 14.5 percent of the respondents reported annual household income of \$150,000 or more.

**European Visitors:** Nearly 36 percent of the European visitors surveyed reported annual household income of \$50,000 or less. Those with income between \$50,000 to \$99,999

accounted for 35 percent while 11.4 percent of the European respondents reported annual household income of \$150,000 or more.

### **Other Visitor Characteristics (TABLES 8.9 TO 8.12)**

**U.S. West Visitors:** Over half of the U.S. West visitors who responded to the 2004 survey were female and 44.6 percent were male. The average age was 48 years old. About 86.3 percent have vacationed more than 2000 miles from home in the past three years. The majority (71%) of the respondents work, 18.1 percent have retired while less than 6 percent were homemakers and/or students.

About 52 percent of the respondents have some college or college degrees, 28 percent have post graduate degrees, and 6.6 percent were high school graduates.

Close to 47 percent of the respondents have friends or relatives in Hawaii, 11.3 percent have lived in Hawaii before. Close to 9 percent own timeshare property in Hawaii while 4.2 percent own other types of property in the islands.

**U.S. East Visitors:** Similar to U.S. West visitors, 56.1 percent of the U.S. East respondents were female and 43.9 percent were male. The average age was 49 years old. The percentages of working visitors, retirees, homemakers and students were also very similar to respondents from the U.S. West.

About 48 percent have some college or college degrees, 29.4 percent have post graduate degrees, and 10.2 percent were high school graduates.

The majority (81.5%) of the visitors have taken a long distance trip of more than 2,000 miles from their homes in the past three years. About 7 percent of the respondents have previously lived in Hawaii, 32.2 percent have friends or relatives here, while 4.4 percent own time-share property in the islands.

**Japanese Visitors:** There were also more female than male Japanese visitors surveyed at 53.6 percent to 46.4 percent, respectively, but in contrast to U.S. visitors surveyed the average age was slightly younger at 43 years old. Close to 60 percent of the respondents work for a living, however there were more homemakers (20%) and fewer retirees (8%) compared to their U.S. counterparts.

About 35.5 percent have some college or college degrees, 3.3 percent have post graduate degrees and a larger percentage (34.6%) were high school graduates in contrast to their U.S. counterparts.

Close to 66 percent of the respondents have taken a long distance trip of more than 2,000 miles from their homes in the past three years. Fewer Japanese respondents have lived in Hawaii before, own time share property in Hawaii or have friends or relatives in the islands compared to U.S. visitors.

**Canadian Visitors:** There were also more female respondents (54%) than male respondents (46%) among Canadian visitors surveyed. The average age was 47 years old. About 68 percent of the respondents work, less than 6 percent were homemaker and students. More retirees (19.3%) from Canada responded to the survey compared to visitors from the other markets.

Nearly 45 percent of the respondents have some college or college degrees, 23.2 percent have post graduate degrees and 14.6 percent were high school graduates.

The majority (87.7%) of the respondents have taken a long distance trip of more than 2,000 miles from their homes in the past three years. Close to 4 percent have lived in Hawaii before, 3.3 percent own timeshare property in the islands, 22.9 percent have friends or relatives in Hawaii.

**European Visitors:** In contrast to U.S. Japanese and Canadian visitors, there were more male (57.8%) respondents from Europe compared to female (42.2%). The average age was 45 years old. Close to 91 percent have vacationed more than 2000 miles from home in the past three years. The largest group of respondents work for a living (74.8%) and 16 percent have retired.

About 37 percent of the respondents have some college or college degrees, 21.6 percent have post graduate degrees while 14.9 percent were high school graduates.

Close to 17 percent of the respondents have friends or relatives in Hawaii, 3.1 percent have lived in Hawaii before, while .5 percent own timeshare property in the islands while .6 percent own other types of property in Hawaii.

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

Lifestage	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
All visitors	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Lifestyle / Lifestage segments						
Wedding / honeymoon	4.7%	3.1%	7.1%	12.8%	4.3%	10.1%
Family	21.9%	24.3%	17.9%	31.4%	23.1%	10.5%
Young	13.1%	13.2%	13.3%	14.3%	15.3%	19.9%
Middle age	31.7%	32.1%	31.1%	19.7%	29.5%	33.1%
Seniors	28.5%	27.3%	30.6%	21.7%	27.8%	26.3%
Visitation status						
First timers	32.8%	22.4%	48.7%	45.1%	41.9%	71.4%
Repeat visitors	67.2%	77.6%	51.3%	54.9%	58.1%	28.6%

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

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

Income	State	Oahu	Kauai	Maui	Big Island
Under \$15,000	1.4%	1.5%	1.0%	0.6%	0.7%
\$15,000 - \$24,999	3.0%	3.5%	3.4%	2.7%	2.1%
\$25,000 - \$29,999	1.9%	2.4%	0.6%	1.6%	1.2%
\$30,000 - \$34,999	2.5%	3.3%	1.4%	2.3%	1.2%
\$35,000 - \$39,999	2.8%	2.8%	2.0%	2.1%	3.1%
\$40,000 - \$44,999	2.7%	3.6%	2.1%	2.6%	2.3%
\$45,000 - \$49,999	4.9%	5.6%	5.7%	3.6%	5.1%
\$50,000 - \$69,999	14.5%	16.1%	13.4%	13.8%	15.0%
\$70,000 - \$99,999	22.2%	22.0%	24.5%	23.7%	21.8%
\$100,000 - \$124,999	15.0%	14.3%	16.4%	15.7%	14.6%
\$125,000 - \$149,999	8.0%	7.5%	8.3%	8.8%	8.2%
\$150,000 or more	21.1%	17.5%	21.2%	22.5%	24.7%

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

Income	State	Oahu	Kauai	Maui	Big Island
Under \$15,000	1.4%	1.8%	1.1%	0.4%	0.9%
\$15,000 - \$24,999	3.6%	4.4%	4.2%	3.3%	2.0%
\$25,000 - \$29,999	1.9%	2.8%	0.6%	1.7%	1.4%
\$30,000 - \$34,999	2.0%	2.6%	1.4%	1.8%	0.5%
\$35,000 - \$39,999	2.7%	2.9%	2.2%	2.4%	3.1%
\$40,000 - \$44,999	2.4%	3.0%	2.3%	2.4%	2.4%
\$45,000 - \$49,999	4.5%	4.9%	5.9%	2.7%	5.9%
\$50,000 - \$69,999	14.3%	16.3%	13.2%	13.5%	14.1%
\$70,000 - \$99,999	21.9%	20.9%	24.3%	23.6%	19.7%
\$100,000 - \$124,999	15.1%	14.6%	14.8%	15.6%	14.1%
\$125,000 - \$149,999	7.5%	6.4%	7.7%	8.4%	8.8%
\$150,000 or more	22.7%	19.5%	22.3%	24.0%	27.1%

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

Income	State	Oahu	Kauai	Maui	Big Island
Under \$15,000	1.4%	1.1%	0.8%	0.8%	0.4%
\$15,000 - \$24,999	2.1%	2.5%	2.2%	1.8%	2.2%
\$25,000 - \$29,999	1.9%	2.1%	0.5%	1.7%	0.9%
\$30,000 - \$34,999	3.4%	4.0%	1.4%	3.1%	2.0%
\$35,000 - \$39,999	2.9%	2.7%	1.6%	1.9%	3.1%
\$40,000 - \$44,999	3.2%	4.2%	1.7%	2.9%	2.2%
\$45,000 - \$49,999	5.3%	6.5%	5.1%	4.8%	3.9%
\$50,000 - \$69,999	14.9%	15.9%	14.2%	14.3%	16.4%
\$70,000 - \$99,999	22.7%	23.4%	24.9%	23.5%	24.0%
\$100,000 - \$124,999	14.8%	13.8%	18.0%	16.2%	15.2%
\$125,000 - \$149,999	8.5%	8.7%	8.8%	9.2%	7.2%
\$150,000 or more	18.9%	15.3%	20.8%	19.8%	22.4%

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

Income (in 10,000 Japanese Yen)	State	Oahu	Kauai	Maui	Big Island
Under 150	4.2%	4.0%	4.9%	4.3%	2.9%
150 - 249.999	5.8%	5.8%	4.2%	2.7%	5.1%
250 - 299.999	5.4%	5.5%	3.2%	3.2%	3.4%
300 - 349.999	6.2%	6.2%	7.4%	6.8%	5.8%
350 - 399.999	5.5%	5.6%	3.6%	4.9%	4.9%
400 - 449.999	5.1%	5.2%	6.0%	3.0%	4.2%
450 - 499.999	6.2%	6.4%	6.2%	4.4%	8.4%
500 - 699.999	15.9%	15.8%	16.1%	13.5%	11.2%
700 - 999.999	21.8%	22.0%	24.0%	27.9%	23.9%
1,000 - 1,249.999	11.2%	11.1%	8.1%	11.2%	14.7%
1,250 - 1,499.999	4.9%	4.9%	6.3%	6.7%	5.1%
1,500 or more	7.8%	7.6%	9.9%	11.5%	10.5%

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

Income (in U.S. dollars)	State	Oahu	Kauai	Maui	Big Island
Under \$15,000	2.7%	3.8%	1.0%	1.3%	2.9%
\$15,000 - \$24,999	5.0%	6.1%	8.0%	3.1%	4.9%
\$25,000 - \$29,999	3.1%	3.5%	3.7%	3.0%	2.8%
\$30,000 - \$34,999	3.0%	3.8%	2.9%	1.1%	3.0%
\$35,000 - \$39,999	4.5%	5.4%	4.5%	3.5%	5.4%
\$40,000 - \$44,999	3.8%	4.4%	3.8%	4.1%	4.5%
\$45,000 - \$49,999	5.4%	6.0%	4.7%	2.8%	4.9%
\$50,000 - \$69,999	14.7%	13.5%	11.8%	15.7%	14.5%
\$70,000 - \$99,999	22.5%	23.8%	26.3%	21.6%	21.7%
\$100,000 - \$124,999	12.9%	12.4%	13.1%	14.7%	12.6%
\$125,000 - \$149,999	7.8%	7.3%	7.8%	8.5%	7.1%
\$150,000 or more	14.5%	10.2%	12.3%	20.6%	15.7%

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

Income (in U.S. dollars)	State	Oahu	Kauai	Maui	Big Island
Under \$15,000	4.5%	4.7%	2.5%	2.5%	4.8%
\$15,000 - \$24,999	6.8%	6.7%	3.5%	6.5%	5.2%
\$25,000 - \$29,999	4.8%	5.6%	3.9%	4.0%	4.8%
\$30,000 - \$34,999	4.6%	4.6%	3.5%	3.8%	3.7%
\$35,000 - \$39,999	4.4%	4.7%	4.4%	3.2%	3.3%
\$40,000 - \$44,999	5.2%	5.1%	4.2%	5.1%	5.2%
\$45,000 - \$49,999	6.0%	7.0%	3.4%	4.8%	4.7%
\$50,000 - \$69,999	14.9%	15.7%	17.7%	15.4%	16.2%
\$70,000 - \$99,999	20.1%	19.6%	21.8%	21.5%	20.0%
\$100,000 - \$124,999	11.0%	10.4%	12.6%	12.2%	13.1%
\$125,000 - \$149,999	6.3%	6.2%	7.2%	5.5%	7.2%
\$150,000 or more	11.4%	9.7%	15.3%	15.6%	11.8%

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

Companion Type	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
With spouse	49.0%	44.8%	55.5%	49.3%	51.9%	48.3%
With children under 18	21.6%	23.9%	17.8%	34.0%	22.6%	10.7%
With other family members	22.3%	23.4%	20.9%	14.1%	21.2%	10.8%
With friends/business associates	21.9%	21.6%	22.6%	24.8%	18.2%	19.0%
with girl/ boy friend	5.5%	6.1%	4.5%	1.5%	5.7%	12.6%
Same sex partner	1.8%	2.0%	1.4%	2.3%	1.0%	1.5%
Alone	10.4%	11.2%	9.1%	4.2%	8.7%	12.0%
Other	2.4%	1.9%	3.1%	2.7%	2.3%	1.9%

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

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

Travel History	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Trips Taken in Past 3 Years <sup>1</sup>						
1 trip	5.3%	4.6%	6.4%	5.5%	6.5%	3.8%
2 to 4 trips	33.3%	32.2%	35.4%	36.3%	38.2%	29.0%
5 to 9 trips	35.8%	35.8%	35.5%	32.0%	33.8%	40.1%
10 or more trips	25.6%	27.5%	22.7%	26.3%	21.6%	27.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Took a Long Distance Trip <sup>2</sup>	84.3%	86.3%	81.5%	66.3%	87.7%	90.6%

<sup>1</sup> Not including this trip to Hawaii.

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

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

Visitor Characteristics	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Lived in Hawaii Before	9.4%	11.3%	6.6%	1.1%	4.1%	3.1%
Have Friends and/or Relatives in Hawaii	41.2%	47.1%	32.2%	14.9%	22.9%	17.3%
Own time share property in Hawaii	7.1%	8.8%	4.4%	2.5%	3.3%	0.5%
Own other types of property in Hawaii	3.2%	4.2%	1.6%	0.6%	2.0%	0.6%

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

Education Level	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
No high school	0.0%	0.0%	0.1%	1.7%	0.7%	3.7%
Some high school	1.0%	1.0%	1.2%	0.7%	3.6%	6.5%
High school graduate	8.1%	6.6%	10.2%	34.6%	14.6%	14.9%
Some college	18.2%	18.9%	16.6%	1.7%	15.9%	12.9%
Associates (2-year) degree	9.0%	9.4%	8.2%	15.6%	6.8%	5.9%
College graduate (4-year)	32.6%	33.4%	31.1%	33.8%	29.3%	24.1%
Post graduate degree	28.4%	28.0%	29.4%	3.3%	23.2%	21.6%
Vocational / technical degree	2.7%	2.6%	3.1%	8.6%	6.1%	10.5%

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

Employment Status	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Working	71.5%	71.0%	71.9%	59.8%	67.8%	74.8%
Retired	17.8%	18.1%	17.5%	8.8%	19.3%	16.0%
Student	2.9%	2.8%	3.1%	3.1%	3.6%	4.0%
Homemaker	5.6%	5.6%	5.7%	20.0%	5.9%	1.8%
Other	2.2%	2.5%	1.8%	8.3%	3.2%	3.5%



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

Purpose	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Vacation	67.8%	69.4%	65.8%	69.3%	77.6%	73.5%
Get married	1.0%	0.8%	1.4%	3.3%	0.8%	1.7%
Honeymoon	2.9%	2.0%	4.5%	7.7%	2.7%	7.5%
Attend/participate in wedding	3.9%	4.1%	3.7%	8.1%	3.5%	1.9%
Attend a business meeting / conduct business	6.9%	6.9%	6.7%	1.2%	2.2%	2.5%
Attend a convention / conference / seminar	3.4%	3.0%	3.9%	1.4%	3.6%	3.9%
Visit friends / relatives	9.5%	9.5%	9.4%	2.1%	5.2%	5.3%
Attend / participate in a sporting event	0.8%	0.7%	0.8%	2.0%	2.2%	1.2%
Attend / participate in a cultural event	0.3%	0.3%	0.3%	0.5%	0.1%	0.2%
Medical treatment	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%
Other	3.5%	3.4%	3.5%	4.4%	2.0%	2.4%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	11.0%	83.6%	64.4%	65.7%	69.7%	69.5%	67.3%
Get married	22.1%	0.0%	0.0%	0.0%	0.0%	1.6%	0.8%
Honeymoon	64.3%	0.0%	0.0%	0.0%	0.0%	6.3%	1.5%
Attend/participate in wedding	0.8%	3.7%	7.2%	3.4%	3.8%	4.1%	3.9%
Attend a business meeting / conduct business	0.8%	1.9%	8.0%	11.5%	5.9%	4.2%	8.1%
Attend a convention / conference / seminar	0.4%	1.3%	2.6%	5.6%	3.4%	3.0%	3.6%
Visit friends / relatives	0.0%	6.8%	11.5%	9.2%	12.3%	6.4%	10.9%
Attend / participate in a sporting event	0.0%	0.2%	1.8%	0.7%	0.4%	0.7%	0.6%
Attend / participate in a cultural event	0.0%	0.4%	0.5%	0.1%	0.3%	0.4%	0.2%
Medical treatment	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%
Other	0.6%	2.1%	3.8%	3.8%	4.0%	3.7%	3.2%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	11.2%	87.2%	65.3%	64.2%	69.8%	71.5%	69.3%
Get married	24.6%	0.0%	0.0%	0.0%	0.0%	1.3%	0.6%
Honeymoon	64.2%	0.0%	0.0%	0.0%	0.0%	5.2%	1.1%
Attend/participate in wedding	0.0%	3.0%	8.4%	3.7%	3.6%	4.7%	3.8%
Attend a business meeting / conduct business	0.0%	1.5%	9.3%	11.5%	6.3%	5.7%	7.4%
Attend a convention / conference / seminar	0.0%	0.4%	1.6%	5.3%	3.3%	2.1%	3.2%
Visit friends / relatives	0.0%	5.1%	11.1%	10.8%	11.5%	5.6%	10.3%
Attend / participate in a sporting event	0.0%	0.0%	1.1%	0.7%	0.6%	0.6%	0.5%
Attend / participate in a cultural event	0.0%	0.5%	0.0%	0.2%	0.3%	0.4%	0.3%
Medical treatment	0.0%	0.0%	0.2%	0.0%	0.2%	0.1%	0.1%
Other	0.0%	2.2%	3.0%	3.7%	4.4%	2.8%	3.5%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	10.5%	76.6%	63.0%	68.6%	70.6%	68.3%	63.4%
Get married	19.8%	0.0%	0.0%	0.0%	0.0%	1.8%	1.1%
Honeymoon	65.4%	0.0%	0.0%	0.0%	0.0%	7.2%	2.3%
Attend/participate in wedding	1.3%	5.0%	5.4%	3.0%	3.8%	3.7%	3.9%
Attend a business meeting / conduct business	1.4%	2.5%	5.7%	11.4%	5.3%	3.1%	9.6%
Attend a convention / conference / seminar	0.6%	2.9%	4.1%	5.8%	3.4%	3.6%	4.4%
Visit friends / relatives	0.0%	10.3%	12.9%	6.4%	13.1%	7.0%	12.0%
Attend / participate in a sporting event	0.0%	0.6%	2.7%	0.7%	0.2%	0.7%	0.7%
Attend / participate in a cultural event	0.0%	0.3%	1.2%	0.0%	0.2%	0.5%	0.1%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	1.0%	1.8%	5.0%	4.0%	3.5%	4.2%	2.6%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	13.7%	78.0%	81.7%	82.2%	70.6%	58.2%	78.4%
Get married	25.6%	0.0%	0.0%	0.0%	0.0%	6.1%	1.1%
Honeymoon	59.6%	0.0%	0.0%	0.0%	0.0%	13.7%	3.0%
Attend/participate in wedding	0.6%	15.0%	7.4%	3.6%	7.2%	11.8%	5.2%
Attend a business meeting / conduct business	0.0%	0.9%	0.5%	2.5%	1.5%	0.6%	1.7%
Attend a convention / conference / seminar	0.0%	0.8%	2.4%	2.2%	1.5%	2.0%	0.9%
Visit friends / relatives	0.0%	1.4%	2.0%	2.6%	4.1%	1.2%	2.8%
Attend / participate in a sporting event	0.0%	1.1%	2.0%	2.4%	3.4%	1.4%	2.2%
Attend / participate in a cultural event	0.0%	0.2%	0.6%	1.0%	0.6%	0.4%	0.5%
Medical treatment	0.0%	0.0%	0.2%	0.0%	0.3%	0.0%	0.2%
Other	0.5%	2.7%	3.3%	3.5%	10.8%	4.7%	4.1%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	14.1%	89.0%	68.7%	79.7%	83.0%	74.6%	80.8%
Get married	19.9%	0.0%	0.0%	0.0%	0.0%	1.8%	0.2%
Honeymoon	65.2%	0.0%	0.0%	0.0%	0.0%	4.0%	2.0%
Attend/participate in wedding	0.0%	5.0%	4.7%	2.8%	3.2%	4.5%	2.9%
Attend a business meeting / conduct business	0.0%	0.3%	5.3%	3.0%	1.6%	2.5%	2.0%
Attend a convention / conference / seminar	0.0%	1.0%	6.4%	6.1%	2.2%	5.1%	2.5%
Visit friends / relatives	0.9%	4.1%	6.3%	4.6%	6.1%	4.4%	5.5%
Attend / participate in a sporting event	0.0%	0.5%	4.2%	1.7%	1.5%	1.4%	1.9%
Attend / participate in a cultural event	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.2%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.2%	3.6%	2.1%	2.4%	1.8%	1.9%

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

Purpose	Lifestyle / Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	8.0%	83.5%	78.2%	79.6%	84.3%	73.5%	73.9%
Get married	16.6%	0.0%	0.0%	0.0%	0.0%	2.0%	1.0%
Honeymoon	74.8%	0.0%	0.0%	0.0%	0.0%	9.4%	3.2%
Attend/participate in wedding	0.3%	2.1%	2.7%	2.3%	1.3%	2.0%	1.6%
Attend a business meeting / conduct business	0.3%	2.1%	2.8%	4.3%	0.9%	1.7%	4.5%
Attend a convention / conference / seminar	0.0%	1.1%	5.1%	5.8%	3.1%	4.4%	2.7%
Visit friends / relatives	0.0%	7.1%	6.4%	3.9%	6.3%	3.5%	8.5%
Attend / participate in a sporting event	0.0%	0.4%	1.3%	1.7%	1.4%	0.7%	2.5%
Attend / participate in a cultural event	0.0%	0.0%	0.4%	0.2%	0.2%	0.2%	0.3%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	3.7%	3.1%	2.2%	2.5%	2.6%	1.9%

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

Purpose	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Vacation	47.1%	42.8%	53.9%	42.0%	50.4%	54.7%
Get married	0.6%	0.5%	0.7%	3.9%	0.3%	1.0%
Honeymoon	2.0%	1.0%	3.6%	9.4%	2.9%	4.4%
Attend/participate in wedding	2.5%	2.6%	2.2%	9.0%	3.0%	1.0%
Attend a business meeting / conduct business	7.3%	8.1%	5.9%	3.5%	4.2%	2.3%
Attend a convention / conference / seminar	2.5%	2.8%	2.0%	1.4%	3.2%	1.5%
Visit friends / relatives	25.0%	29.1%	18.4%	10.0%	23.6%	18.7%
Attend / participate in a sporting event	2.2%	2.2%	2.1%	4.2%	1.7%	2.8%
Attend / participate in a cultural event	1.2%	1.3%	1.1%	1.7%	0.9%	2.5%
Medical treatment	0.1%	0.1%	0.0%	1.1%	0.4%	0.3%
Other	9.5%	9.4%	10.0%	13.8%	9.5%	10.8%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	47.6%	38.1%	51.0%	48.0%	48.2%	51.3%	44.7%
Get married	9.5%	0.0%	0.0%	0.0%	0.0%	1.0%	0.5%
Honeymoon	31.1%	0.0%	0.0%	0.0%	0.0%	4.3%	1.1%
Attend/participate in wedding	2.1%	2.3%	2.9%	2.1%	2.9%	2.3%	2.5%
Attend a business meeting / conduct business	1.3%	10.7%	6.8%	8.0%	6.2%	4.3%	8.8%
Attend a convention / conference / seminar	0.0%	3.3%	0.9%	4.4%	1.7%	2.5%	2.7%
Visit friends / relatives	5.0%	31.1%	28.2%	23.2%	27.7%	22.5%	26.7%
Attend / participate in a sporting event	1.8%	1.8%	0.3%	2.7%	2.0%	1.3%	2.2%
Attend / participate in a cultural event	0.0%	0.4%	0.7%	0.9%	2.3%	0.5%	1.4%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%
Other	1.6%	12.3%	9.2%	10.8%	8.8%	10.0%	9.4%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	49.5%	30.8%	46.7%	44.0%	45.0%	45.6%	41.5%
Get Married	13.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%
Honeymoon	25.4%	0.0%	0.0%	0.0%	0.0%	2.2%	0.8%
Attend / participate in a wedding	0.0%	2.4%	3.9%	2.1%	2.7%	0.9%	3.0%
Attend a business meeting / conduct business	3.2%	11.8%	5.8%	9.4%	6.8%	5.0%	9.2%
Attend a convention / conference / seminar	0.0%	3.3%	1.0%	5.0%	1.8%	3.1%	2.9%
Visit friends / relatives	6.2%	33.8%	33.0%	25.7%	33.0%	32.5%	28.8%
Attend / participate in a sporting event	2.8%	1.5%	0.0%	3.2%	0.8%	1.0%	1.9%
Attend / participate in a cultural event	0.0%	0.6%	1.1%	0.8%	2.5%	0.8%	1.4%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%
Other	0.0%	15.7%	8.5%	9.9%	6.9%	8.1%	9.9%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	48.2%	52.4%	59.7%	54.2%	51.8%	55.5%	51.7%
Get Married	7.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.3%
Honeymoon	33.7%	0.0%	0.0%	0.0%	0.0%	5.8%	1.9%
Attend / participate in a wedding	3.4%	2.1%	1.2%	1.9%	3.1%	3.4%	1.3%
Attend a business meeting / conduct business	0.0%	8.2%	8.3%	6.0%	4.9%	4.0%	7.3%
Attend a convention / conference / seminar	0.0%	3.1%	0.9%	3.3%	1.4%	2.0%	2.1%
Visit friends / relatives	4.1%	25.6%	19.1%	19.8%	19.6%	15.1%	22.0%
Attend / participate in a sporting event	1.1%	2.4%	0.8%	1.7%	3.8%	1.4%	2.8%
Attend / participate in a cultural event	0.0%	0.0%	0.0%	1.0%	1.9%	0.3%	1.3%
Medical treatment	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	2.6%	6.3%	10.2%	12.0%	13.4%	11.3%	9.3%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	42.0%	45.8%	42.4%	39.5%	37.9%	48.7%	36.7%
Get Married	15.3%	0.0%	0.0%	0.0%	0.0%	4.4%	3.6%
Honeymoon	36.6%	0.0%	0.0%	0.0%	0.0%	16.1%	4.3%
Attend / participate in a wedding	1.7%	9.2%	15.7%	13.5%	10.0%	7.6%	10.2%
Attend a business meeting / conduct business	0.4%	3.3%	6.7%	8.1%	1.0%	2.0%	4.8%
Attend a convention / conference / seminar	0.4%	1.0%	1.5%	3.1%	2.4%	2.4%	0.8%
Visit friends / relatives	0.4%	15.0%	9.7%	12.5%	14.3%	3.5%	14.9%
Attend / participate in a sporting event	1.1%	4.0%	5.8%	6.5%	5.1%	3.3%	4.7%
Attend / participate in a cultural event	0.0%	2.5%	1.4%	1.8%	2.5%	1.4%	1.7%
Medical treatment	0.0%	0.8%	0.8%	3.2%	1.7%	0.6%	1.5%
Other	2.2%	18.5%	15.9%	11.8%	25.0%	9.9%	16.7%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	43.3%	39.6%	49.3%	57.6%	47.6%	49.4%	49.0%
Get Married	4.5%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Honeymoon	42.9%	0.0%	0.0%	0.0%	0.0%	3.8%	2.4%
Attend / participate in a wedding	0.0%	3.4%	2.9%	1.7%	5.1%	4.2%	2.0%
Attend a business meeting / conduct business	0.0%	4.2%	2.0%	5.9%	4.4%	4.6%	3.6%
Attend a convention / conference / seminar	4.9%	4.8%	4.3%	1.4%	2.0%	2.7%	3.2%
Visit friends / relatives	0.0%	34.4%	30.7%	21.2%	23.3%	23.5%	25.2%
Attend / participate in a sporting event	0.0%	3.1%	2.2%	1.0%	2.2%	1.0%	2.6%
Attend / participate in a cultural event	0.0%	2.4%	0.0%	0.0%	2.2%	0.9%	1.1%
Medical treatment	0.0%	0.0%	0.0%	0.0%	1.6%	0.6%	0.2%
Other	4.5%	8.2%	8.6%	11.1%	11.6%	8.6%	10.7%

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

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

Purpose	Lifestyle / Lifestage Segments					Repeat Visitation	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First Timers	Repeat Visitors
Vacation	56.6%	64.2%	58.2%	47.9%	56.5%	59.4%	45.7%
Get Married	6.5%	0.0%	0.0%	0.0%	0.0%	0.9%	1.2%
Honeymoon	29.4%	0.0%	0.0%	0.0%	0.0%	5.8%	2.0%
Attend / participate in a wedding	0.9%	0.0%	0.0%	0.7%	2.2%	0.4%	1.7%
Attend a business meeting / conduct business	0.0%	2.0%	0.9%	4.2%	2.3%	2.1%	2.5%
Attend a convention / conference / seminar	0.0%	0.0%	2.9%	1.3%	1.9%	1.9%	0.6%
Visit friends / relatives	3.0%	15.7%	25.1%	21.2%	22.8%	12.8%	30.7%
Attend / participate in a sporting event	1.6%	2.4%	5.2%	3.6%	0.4%	1.6%	5.2%
Attend / participate in a cultural event	0.0%	1.7%	3.2%	3.5%	2.6%	3.0%	1.8%
Medical treatment	0.0%	0.0%	0.0%	0.7%	0.4%	0.4%	0.2%
Other	1.9%	14.1%	4.5%	16.8%	10.8%	11.7%	8.4%

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

## 9. DEFINITION & SURVEY METHODOLOGY

# DEFINITIONS AND SURVEY METHODOLOGY

## DEFINITIONS

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

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

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

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

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

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

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

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

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

## **SURVEY METHODOLOGY:**

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

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

There are two versions of the *Visitor Satisfaction Survey* form, one in English and the other in Japanese. The 2004 survey has 8 pages and 33 questions.

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

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

In 2004, a total of 10,874 questionnaires were mailed to Japanese visitors, 3,527 of which responded, translating into a response rate of 32.4 percent. 10,770 questionnaires were mailed to U.S. visitors, 3,281 of which were returned or a response rate of 30.5 percent. A total of 10,671 survey forms were mailed to Canadian and European visitors during 2004, 3,387 of which responded, yielded a response rate of 31.7 percent. Sampling errors are calculated to be 2.5% percent for U.S. West visitors, 2.6 percent for U.S. East visitors, 1.3 percent for Japanese visitors, 3.1 percent for Canadian visitors, and 1.9% for European visitors.

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



**10. 2004 VISITOR SATISFACTION  
SURVEY FORM  
(English version)**





## 2004 VISITOR SATISFACTION SURVEY

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

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

MARKING INSTRUCTIONS	
<b>CORRECT MARKS:</b> ● ● ● ●	<b>INCORRECT MARKS:</b> ⊗ ⊙ ⊖ ⊕ ⊙

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

- Excellent
- Above average
- Below average
- Poor

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

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

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

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

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

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

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

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

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

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

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

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

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

	Q6a. Primary Purpose (one answer only)	Q6b. Secondary Purpose
Vacation-----	<input type="radio"/>	<input type="radio"/>
Attend a business meeting or conduct business-----	<input type="radio"/>	<input type="radio"/>
Attend a convention, conference or seminar-----	<input type="radio"/>	<input type="radio"/>
Visit friends or relatives-----	<input type="radio"/>	<input type="radio"/>
Get married-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a wedding-----	<input type="radio"/>	<input type="radio"/>
Honeymoon-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a sporting event-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a cultural event-----	<input type="radio"/>	<input type="radio"/>
Medical treatment-----	<input type="radio"/>	<input type="radio"/>
Other (please specify) _____	<input type="radio"/>	<input type="radio"/>

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

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

	Q7a. Visited	Q7b. Number of Nights		
Island of Oahu (Waikiki/Honolulu)-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		
Island of Maui-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		
Island of Moloka'i-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		
Island of Lana'i-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		
Big Island of Hawai'i (Kona/Hilo)-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		
Island of Kaua'i-----	<input type="radio"/>	<table border="1"><tr><td></td><td></td></tr></table>		

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

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

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

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

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

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

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

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

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

	Less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/pleasure trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decide to visit Hawai'i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decide on which islands to visit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Set the date for the trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Make airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase tickets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Make accommodation reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Make rental car reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchase tour or attraction packages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

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

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

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

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

16. Which of the following describes the way you used the Internet to plan and book this trip? *(Mark all that apply)*

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

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

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

18. Not counting this trip to Hawai'i, how many vacations and overnight pleasure trips have you taken in the past 3 years?
- 1 trip
  - 2-4 trips
  - 5-9 trips
  - 10 or more trips
19. Not counting this trip to Hawai'i, have you vacationed more than 1,000 miles from your home in the past 3 years?
- Yes
  - No
20. Did you ever live in Hawai'i before?
- Yes
  - No
21. Do you have friends and/or relatives who live in Hawai'i?
- Yes
  - No
22. Do you own property in Hawai'i?
- Yes, I own timeshare units
  - Yes, I own other types of property
  - No
23. Please indicate your highest level of educational training:
- No high school
  - Some high school
  - High school graduate
  - Some college
  - Associates (2 year) degree
  - College graduate (4 year)
  - Post graduate degree
  - Vocational/technical
24. Which of the following categories includes your household's total annual income from all sources before taxes for 2003 (in US dollars)?
- Up to \$15,000
  - \$15,000 to \$24,999
  - \$25,000 to \$29,999
  - \$30,000 to \$34,999
  - \$35,000 to \$39,999
  - \$40,000 to \$44,999
  - \$45,000 to \$49,999
  - \$50,000 to \$69,999
  - \$70,000 to \$99,999
  - \$100,000 to \$124,999
  - \$125,000 to \$149,999
  - \$150,000 or more
25. What is your age?
26. What is your gender?
- Male
  - Female
27. What is your employment status?
- Working
  - Retired
  - Student
  - Homemaker
  - Other
28. On your most recent trip, what airport did you first arrive in Hawai'i?
- Honolulu Airport on O'ahu
  - Kahului Airport on Maui
  - Kona Airport on Hawai'i
  - Hilo Airport on Hawai'i
  - Lihue Airport on Kaua'i
  - Lana'i Airport on Lana'i

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

- Excellent
- Above average
- Below average
- Poor

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

- Yes
- No

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

- Yes
- No

32. The safety of our visitors is important to us. We would like to know if you experienced any of the following while in Hawai'i?  
*(Mark all that apply)*

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

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

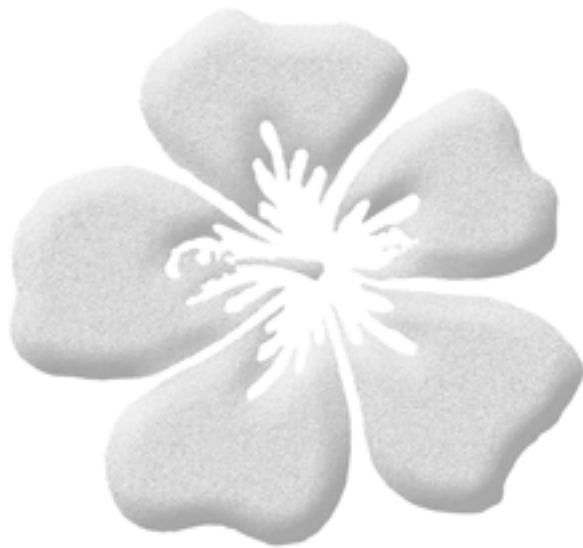
- Less than \$1,000
- \$1,000 to \$1,999
- \$2,000 to \$2,999
- \$3,000 to \$3,999
- \$4,000 to \$4,999
- \$5,000 to \$5,999
- \$6,000 to \$6,999
- \$7,000 to \$7,999
- \$8,000 to \$8,999
- \$9,000 to \$9,999
- More than \$10,000

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

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







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