

Visitor Satisfaction Study

Q3 2019

Prepared for:
Hawai'i Tourism Authority

METHODOLOGY – OVERALL

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

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	2,436	1.99	18.57%
U.S. East	2,313	2.04	17.47%
Japan	1,946	2.22	38.99%
Canada	1,713	2.37	62.84%
Europe	674	3.77	24.88%
Oceania	828	3.41	25.80%
China	306	5.60	29.85%
Korea	346	5.27	43.14%
All MMAs	10,562	.95	25.26%

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

METHODOLOGY – OVERALL (cont.)

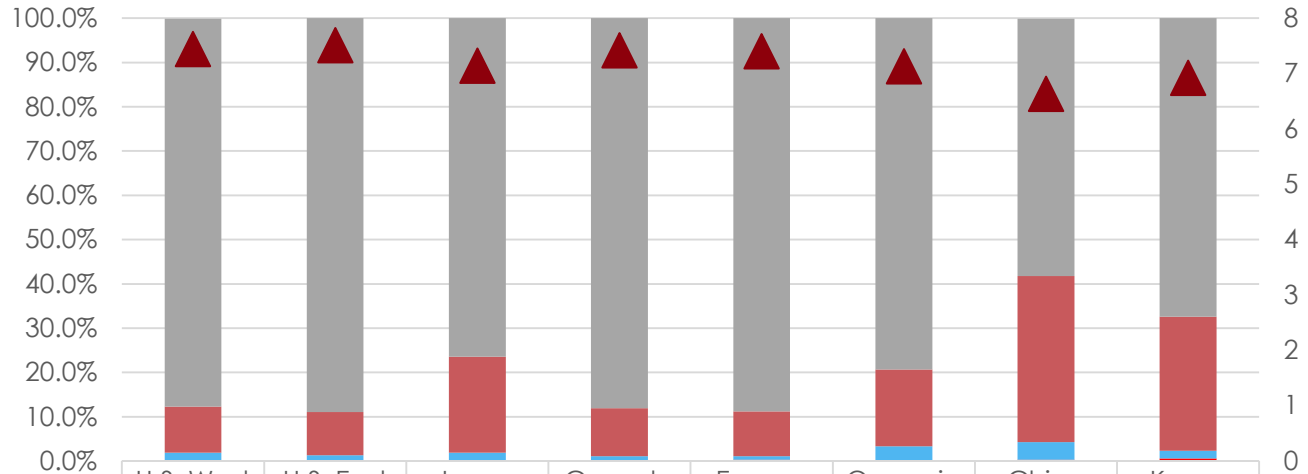
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also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

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

SECTION – VISITOR SATISFACTION

OVERALL SATISFACTION – MOST RECENT VISIT

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Extremely satisfied (7-8)	87.6%	89.0%	76.5%	88.1%	88.9%	79.3%	58.1%	67.5%
■ Somewhat satisfied (5-6)	10.4%	9.8%	21.7%	10.8%	10.1%	17.4%	37.5%	30.3%
■ Somewhat dissatisfied (3-4)	1.7%	1.2%	1.8%	1.1%	0.8%	3.1%	4.0%	1.7%
■ Not at all satisfied (1-2)	0.2%	0.1%	0.1%	0.0%	0.3%	0.2%	0.3%	0.6%
BASE	2,436	2,313	1,946	1,713	674	828	306	346
▲ MEAN	7.44	7.51	7.14	7.42	7.40	7.13	6.63	6.92

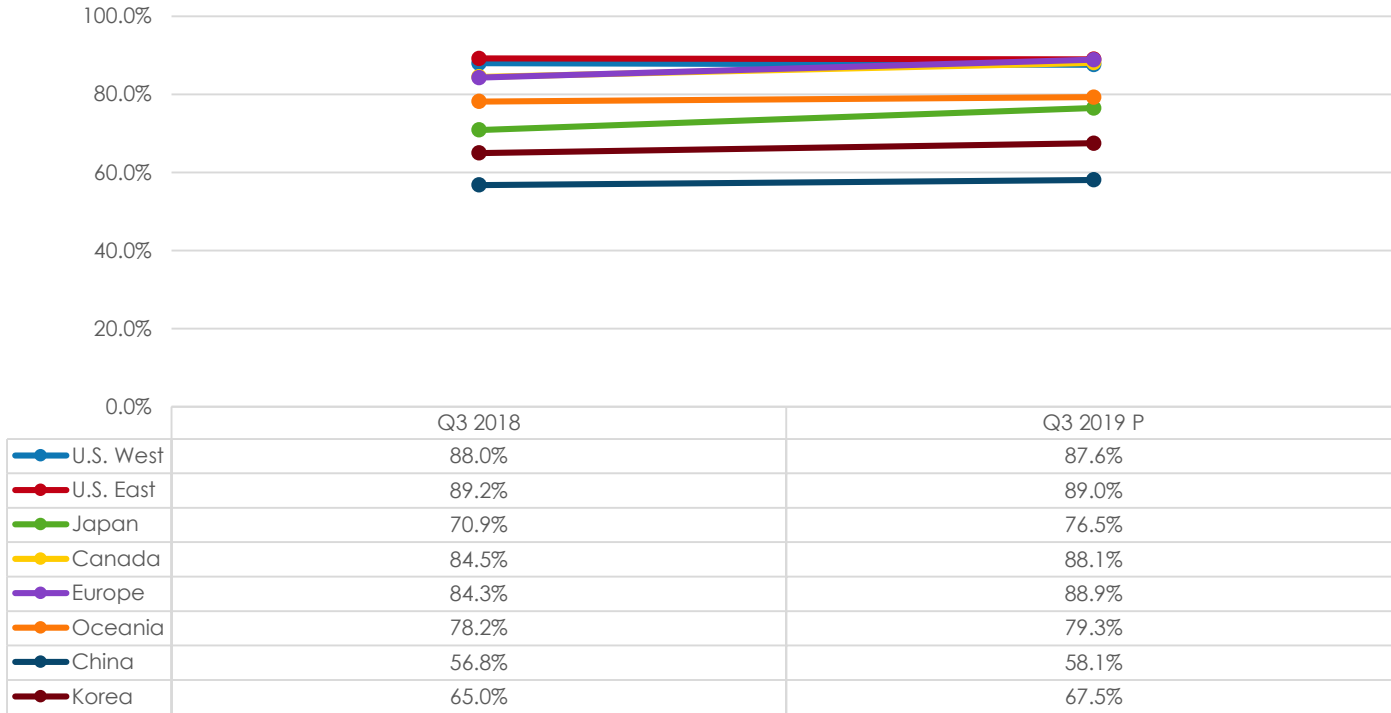
OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN RATINGS

- **First-time vs Repeat:** First-time Chinese visitors were more satisfied with their overall experience in Hawai'i than repeat visitors from China.
- **Visited single island vs Multi-Island visit:** Visitors from U.S. West and Japan who visited multiple islands during their trip to Hawai'i were more satisfied overall than those visiting a single island from these particular visitor markets.
- **Gender:** Female travelers from the following visitor markets were more satisfied than their male counterparts: U.S. West, U.S. East, and Oceania.
- **Age:** Younger travelers from U.S. West, U.S. East, and Oceania tended to give higher satisfaction scores compared to older travelers from these visitor markets.

OVERALL SATISFACTION – MOST RECENT VISIT

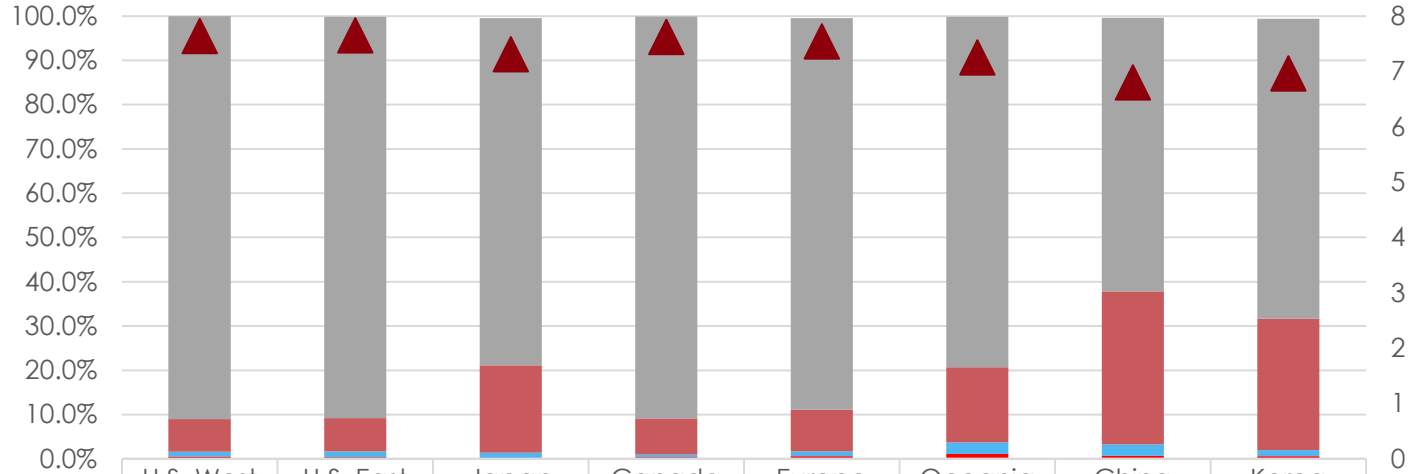
8-pt Rating Scale
8=Extremely Satisfied / 1=Not Satisfied at All



P= Preliminary Data

BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	91.0%	90.6%	78.4%	90.8%	88.4%	79.1%	61.8%	67.7%
■ Somewhat likely (5-6)	7.4%	7.5%	19.7%	8.1%	9.4%	17.0%	34.5%	29.7%
■ Somewhat unlikely (3-4)	1.1%	1.3%	1.2%	0.6%	1.1%	2.6%	2.6%	1.4%
■ Very unlikely (1-2)	0.5%	0.4%	0.2%	0.4%	0.6%	1.1%	0.7%	0.6%
BASE	2,436	2,313	1,946	1,713	674	828	306	346
▲ MEAN	7.64	7.65	7.31	7.62	7.54	7.25	6.80	6.96

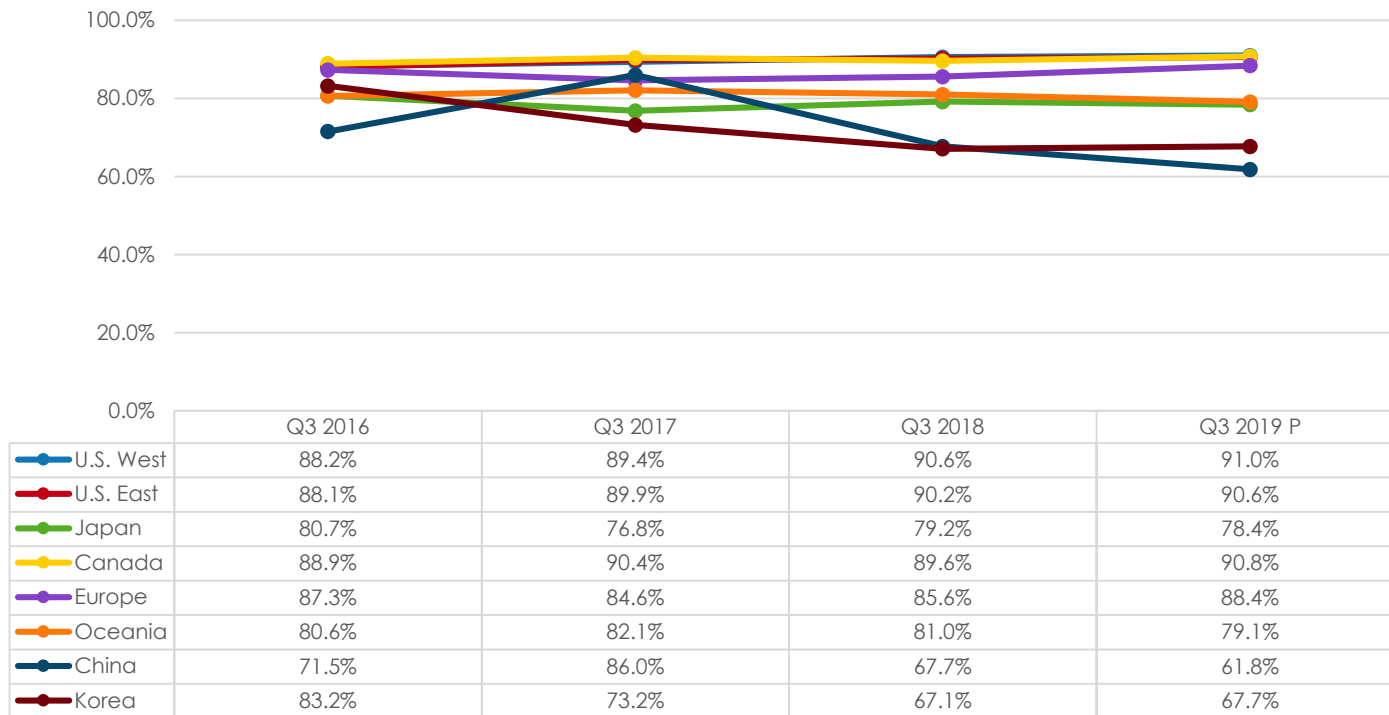
BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES

- **First-time vs Repeat:** Repeat visitors from Japan and Oceania are more likely to recommend Hawai'i to others than were first-time visitors from these markets.
- **Visited single island vs Multi-Island visit:** Visitors from U.S. West who visited multiple islands during their trip to Hawai'i were more likely to recommend the State than were those who visited a single island during this stay.
- **Gender:** Female travelers from the following visitor markets were more likely to recommend Hawai'i as a destination than their male counterparts: U.S. West, U.S. East, and Japan.
- **Age:** Younger travelers from China are more likely to recommend Hawai'i as a destination than older travelers from this visitor market.
- **College graduate:** More educated travelers from U.S. West and China are more likely to recommend the State to others than were those without a college degree from these visitor markets.

BRAND/DESTINATION – ADVOCACY

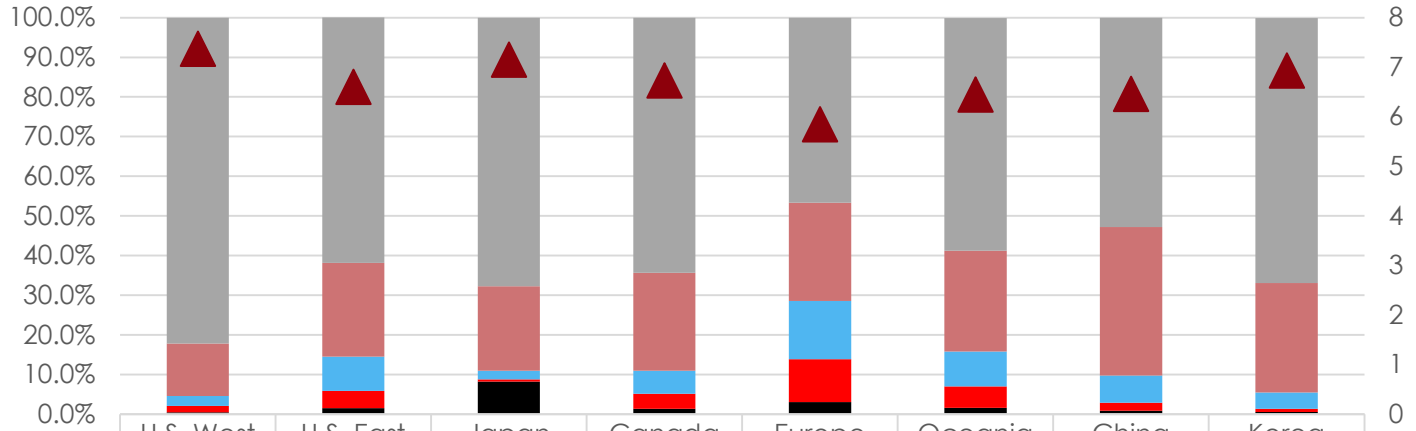
TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	82.2%	61.9%	67.7%	64.3%	46.7%	58.7%	52.8%	66.8%
■ Somewhat likely (5-6)	13.2%	23.7%	21.3%	24.7%	24.7%	25.4%	37.4%	27.6%
■ Somewhat unlikely (3-4)	2.5%	8.6%	2.2%	5.8%	14.7%	8.8%	6.9%	4.1%
■ Very unlikely (1-2)	1.6%	4.4%	0.6%	3.8%	10.8%	5.4%	2.0%	0.8%
■ Not Sure	0.5%	1.5%	8.2%	1.4%	3.1%	1.6%	0.9%	0.6%
BASE	2,436	2,313	1,946	1,713	674	828	306	346
▲ MEAN	7.37	6.60	7.15	6.73	5.85	6.45	6.46	6.93

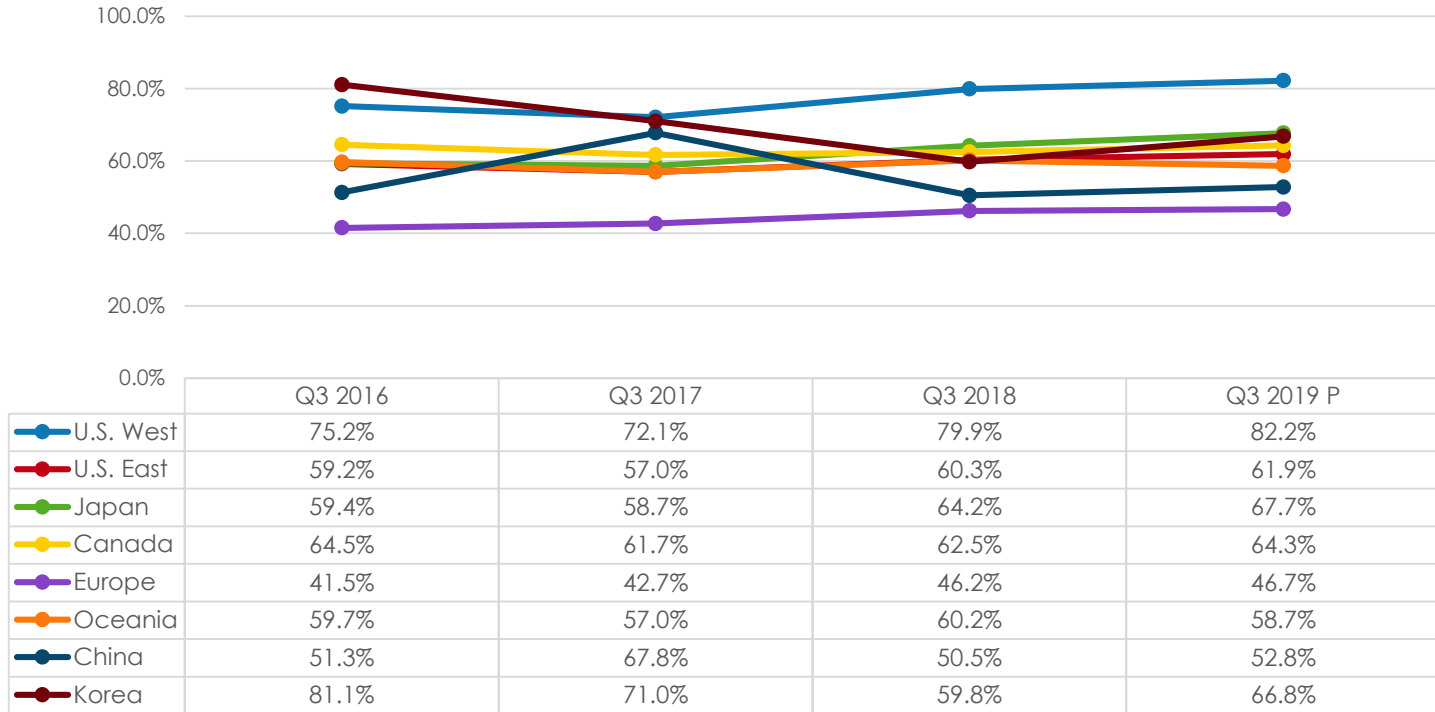
LIKELIHOOD OF RETURN VISIT

COMPARISON OF MEAN SCORES

- **First-time vs Repeat:** Repeat visitors from the following visitor markets expressed a greater likelihood to return to Hawai'i than first-time visitors: U.S. West, U.S. East, Japan, Canada, Europe, and Oceania.
- **Visited single island vs Multi-Island visit:** Travelers from the following visitor markets who visited a single island during their trip express a greater likelihood to return to Hawai'i: U.S. East, Canada, and Oceania.
- **Age:** Younger travelers from Japan or those under 35 are the least likely to indicate a possible return visit to Hawai'i when examining this particular market. Conversely, younger travelers from Oceania express a greater likelihood to return than older travelers from this region.
- **College graduate:** Less educated travelers from U.S. East express a greater likelihood to return to the State than were those from this visitor market that possess a college degree. Conversely, visitors from China who are college graduates are more likely to return than those visitors without a degree from this market.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q3 2018	Q3 2019 P
47.0% Too expensive	44.9% Want to go someplace new
45.1% Want to go someplace new	43.4% Too expensive
22.0% Too crowded/ congested/ traffic	31.1% Too crowded/ congested/ traffic
20.3% Poor value	29.3% Poor value
17.0% Five years is too soon	22.3% Too commercialized/ overdeveloped
16.2% Flight is too long	16.2% No reason to return/ nothing new
15.1% Other financial obligations	12.4% Five years is too soon
15.0% Too commercialized/ overdeveloped	
12.9% No reason to return/ nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q3 2018	Q3 2019 P
55.3% Too expensive	51.7% Too expensive
42.8% Want to go someplace new	45.6% Want to go someplace new
41.0% Flight is too long	41.1% Flight is too long
21.2% Other financial obligations	22.4% Five years is too soon
19.3% Five years is too soon	14.9% Other financial obligations
15.8% Poor value	14.7% Poor value
10.4% Too crowded/ congested/ traffic	13.5% Too crowded/ congested/ traffic
10.1% No reason to return/ nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q3 2018	Q3 2019 P
40.7% Too expensive	38.2% Too expensive
30.7% Want to go someplace new	29.7% Want to go someplace new
26.3% Flight is too long	29.7% Five years is too soon
24.0% Other financial obligations	26.9% Other financial obligations
23.9% Five years is too soon	20.8% Flight is too long

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CANADA

Q3 2018	Q3 2019 P
50.0% Too expensive	58.1% Want to go someplace new
48.3% Want to go someplace new	51.2% Too expensive
27.7% Flight is too long	36.4% Flight is too long
27.2% Five years is too soon	29.8% Five years is too soon
19.4% Other financial obligations	17.3% Poor value
18.8% Poor value	15.7% Other financial obligations
11.2% No reason to return/ nothing new	13.1% No reason to return/ nothing new

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS EUROPE

Q3 2018	Q3 2019 P
62.9% Flight is too long	62.3% Flight is too long
46.9% Too expensive	53.0% Too expensive
36.5% Want to go someplace new	38.3% Want to go someplace new
26.8% Five years is too soon	29.7% Five years is too soon
17.7% Too commercialized/ overdeveloped	10.5% Too commercialized/ overdeveloped
11.5% Other financial obligations	
10.6% Poor value	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q3 2018	Q3 2019 P
49.8% Want to go someplace new	52.0% Want to go someplace new
46.1% Too expensive	44.7% Too expensive
33.2% Too commercialized/ overdeveloped	29.9% Poor value
30.9% Too crowded/ congested/ traffic	26.3% Too commercialized/ overdeveloped
30.0% Poor value	18.0% Too crowded/ congested/ traffic
22.5% No reason to return/ nothing new	14.7% No reason to return/ nothing new
17.7% Five years is too soon	11.6% Flight is too long
13.4% Flight is too long	10.2% Five years is too soon
11.5% Other financial obligations	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CHINA

Q3 2018	Q3 2019 P
53.3% Too expensive	56.9% Want to go someplace new
46.7% Flight is too long	40.5% Too expensive
43.5% Five years is too soon	37.9% Poor value
36.6% Want to go someplace new	31.0% No reason to return/ nothing new
26.6% Poor value	29.8% Five years is too soon
16.9% No reason to return/ Nothing new	27.8% Flight too long
16.9% Too commercialized/ overdeveloped	10.1% Too commercialized/ overdeveloped
	10.1% Unfriendly people/ unwelcome

P= Preliminary Data

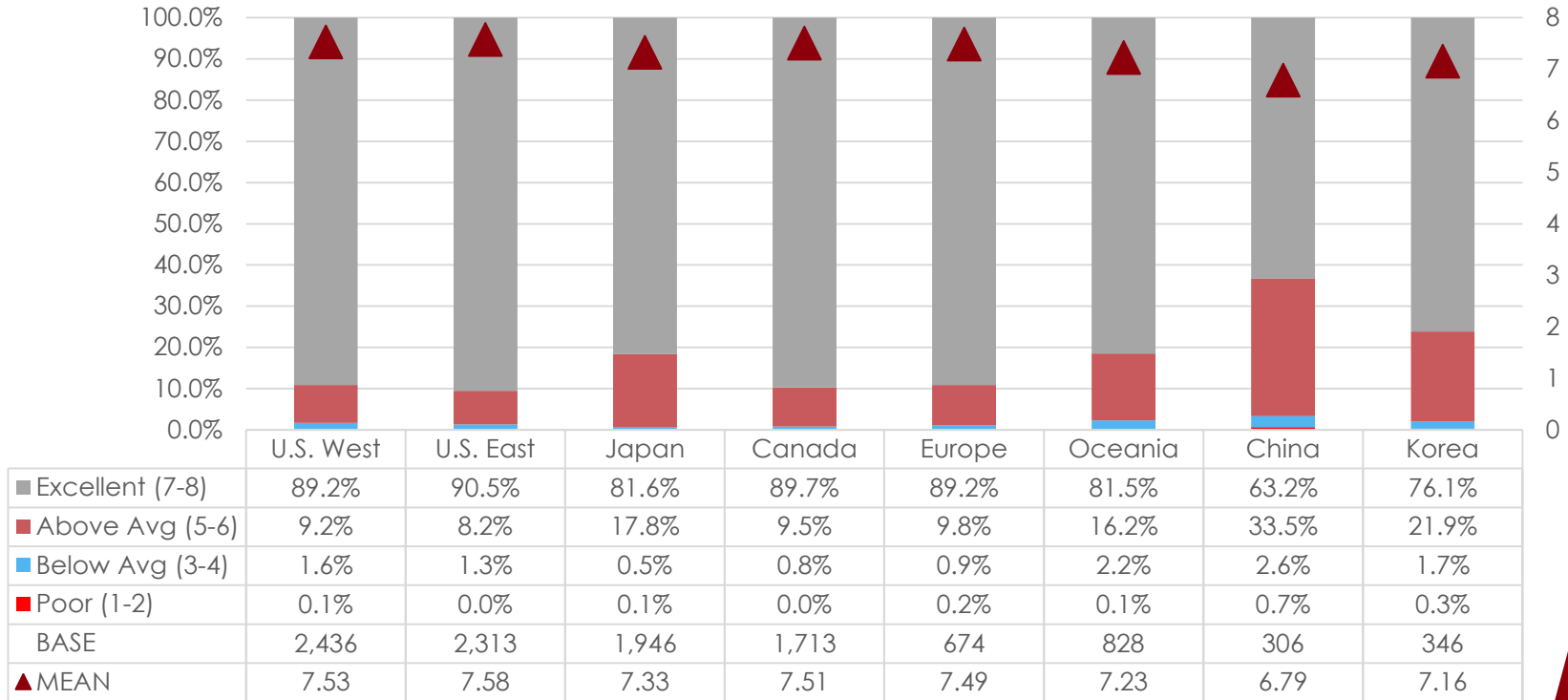
UNLIKELY TO RETURN – TOP REASONS KOREA

Q3 2018	Q3 2019 P
61.5% Too expensive	75.2% Too expensive
39.0% Flight is too long	29.7% Poor value
35.8% Poor value	24.8% No reason to return/ Nothing new
32.1% Want to go someplace new	24.8% Other financial obligations
22.5% No reason to return/ Nothing new	20.8% Flight is too long
19.4% Five years is too soon	20.8% Too crowded/ congested
19.0% Other financial obligations	19.8% Five years is too soon
19.0% Poor service	
12.9% Too commercialized/ overdeveloped	
12.9% Unfriendly people/ felt unwelcome	

P= Preliminary Data

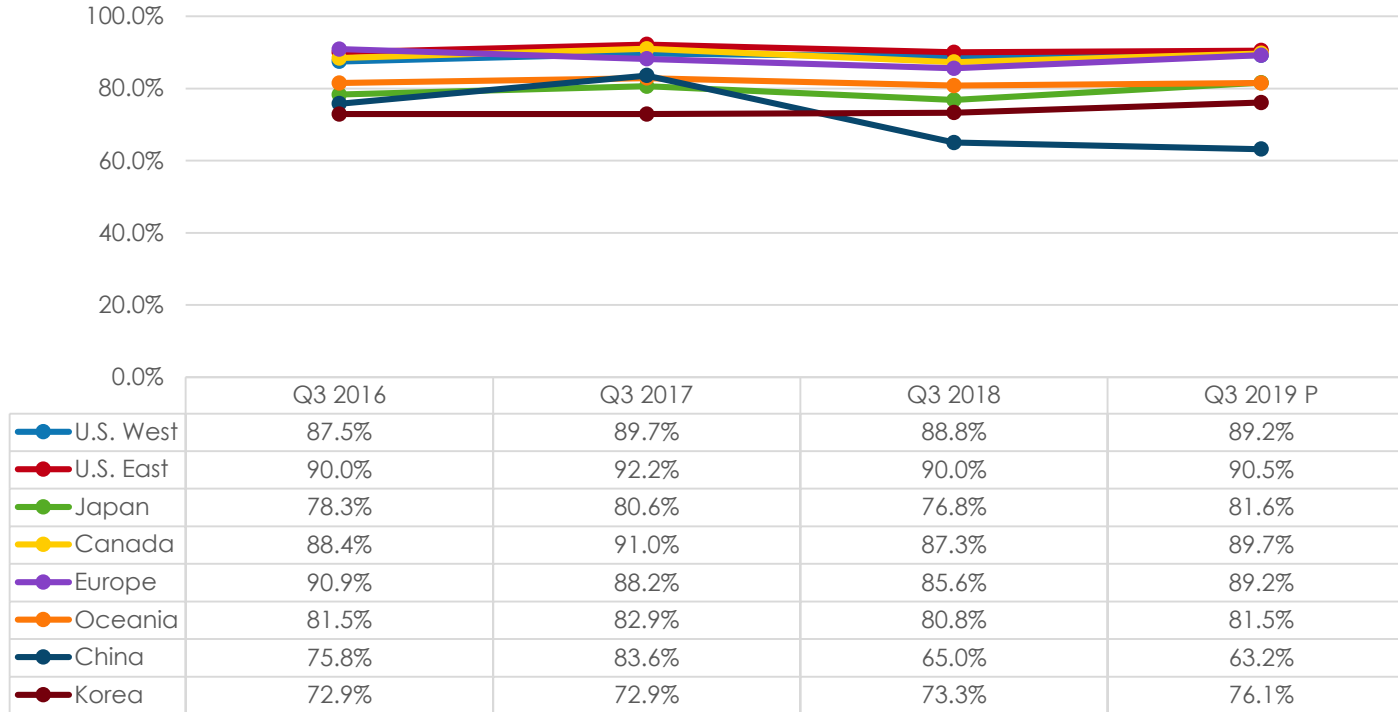
SATISFACTION – STATE OF HAWAI‘I BY MMA

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



SATISFACTION – STATE OF HAWAI‘I BY MMA

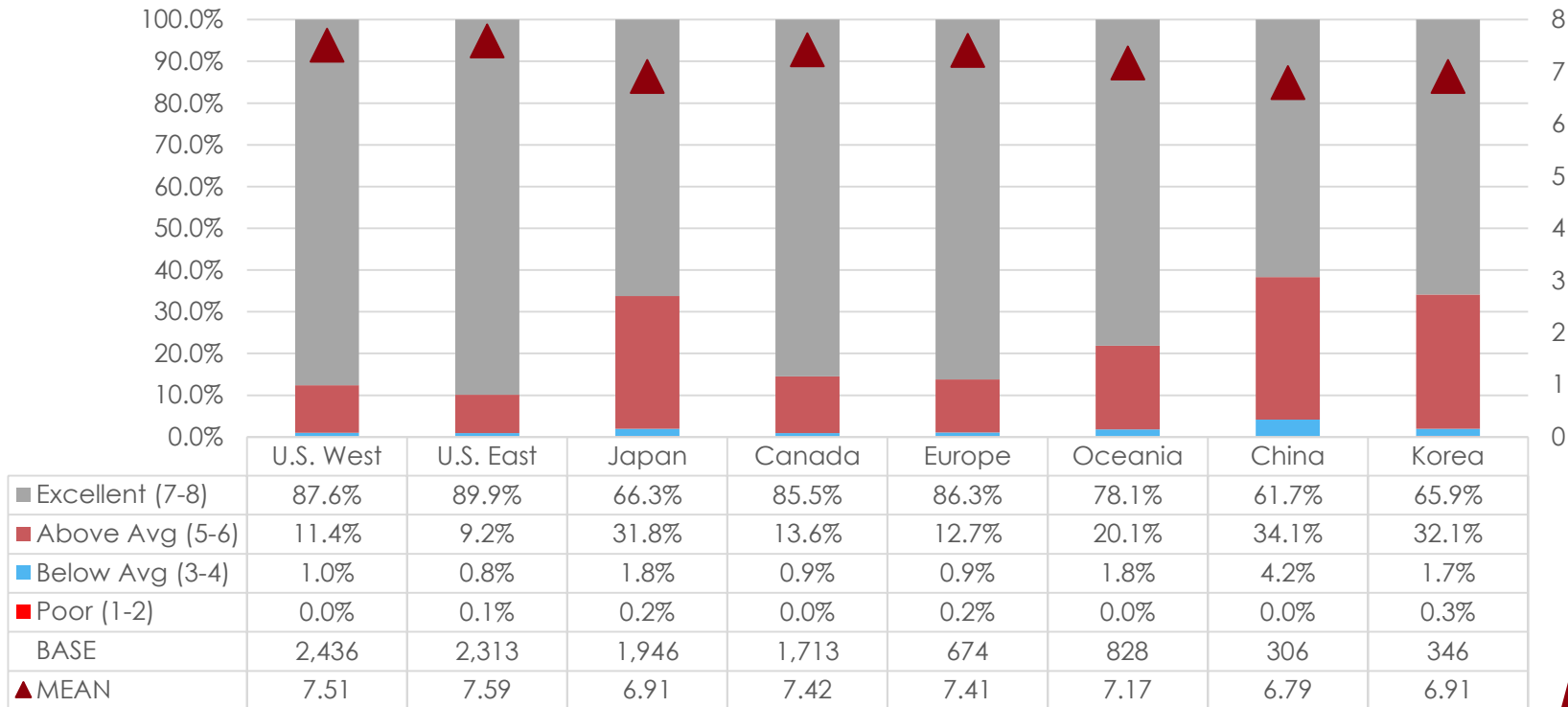
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

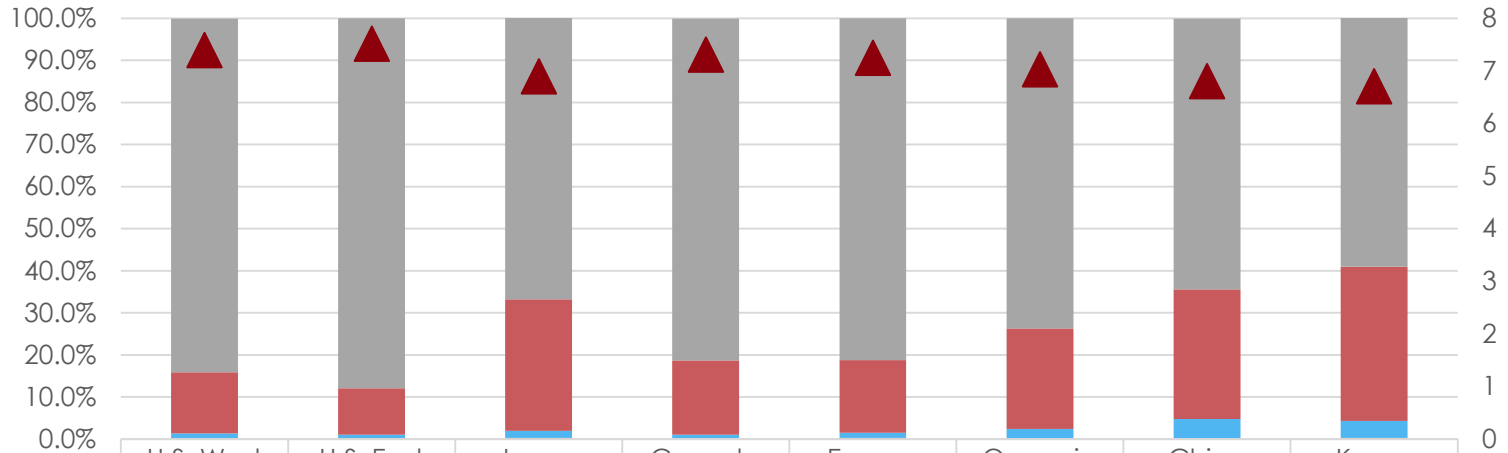
OFFERING A VARIETY OF EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

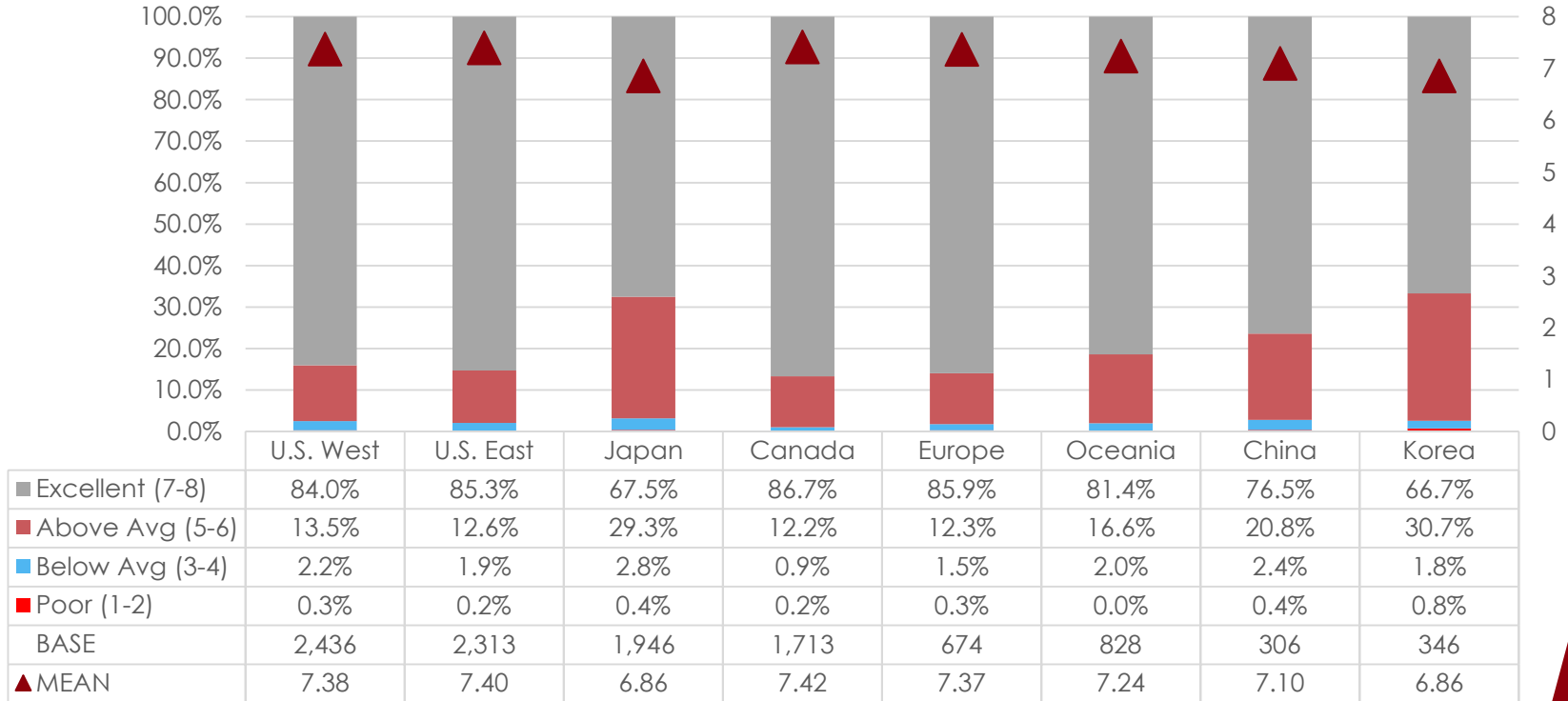
8-pt Rating Scale
8=Excellent / 1=Poor



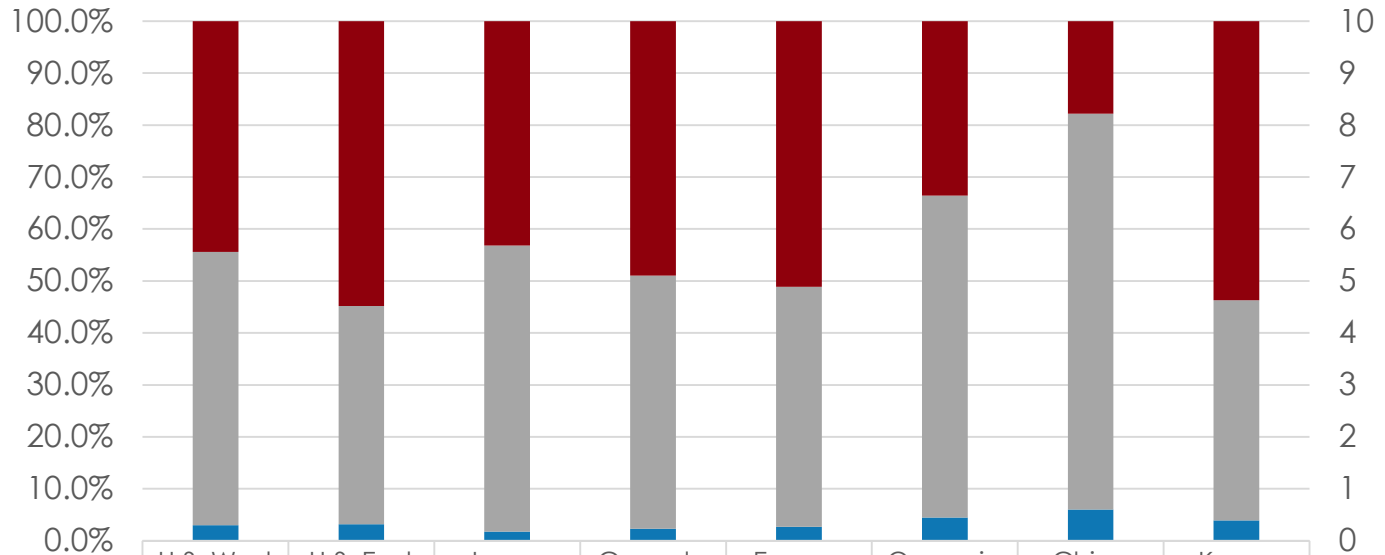
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	84.0%	87.9%	66.9%	81.2%	81.2%	73.7%	64.3%	59.1%
■ Above Avg (5-6)	14.5%	11.0%	31.2%	17.6%	17.3%	23.9%	30.8%	36.7%
■ Below Avg (3-4)	1.4%	0.9%	1.7%	1.0%	1.2%	2.4%	4.8%	4.0%
■ Poor (1-2)	0.0%	0.2%	0.3%	0.1%	0.3%	0.0%	0.0%	0.3%
BASE	2,436	2,313	1,946	1,713	674	828	306	346
▲ MEAN	7.40	7.52	6.90	7.31	7.25	7.03	6.81	6.71

BEING A SAFE AND SECURE DESTINATION

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



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Exceeded expectations	44.4%	54.8%	43.2%	49.0%	51.1%	33.6%	17.8%	53.7%
Met expectations	52.6%	42.0%	55.0%	48.7%	46.2%	61.9%	76.2%	42.4%
Did NOT meet expectations	3.0%	3.2%	1.8%	2.3%	2.7%	4.5%	6.0%	3.9%
BASE	2,436	2,313	1,946	1,713	674	828	306	346

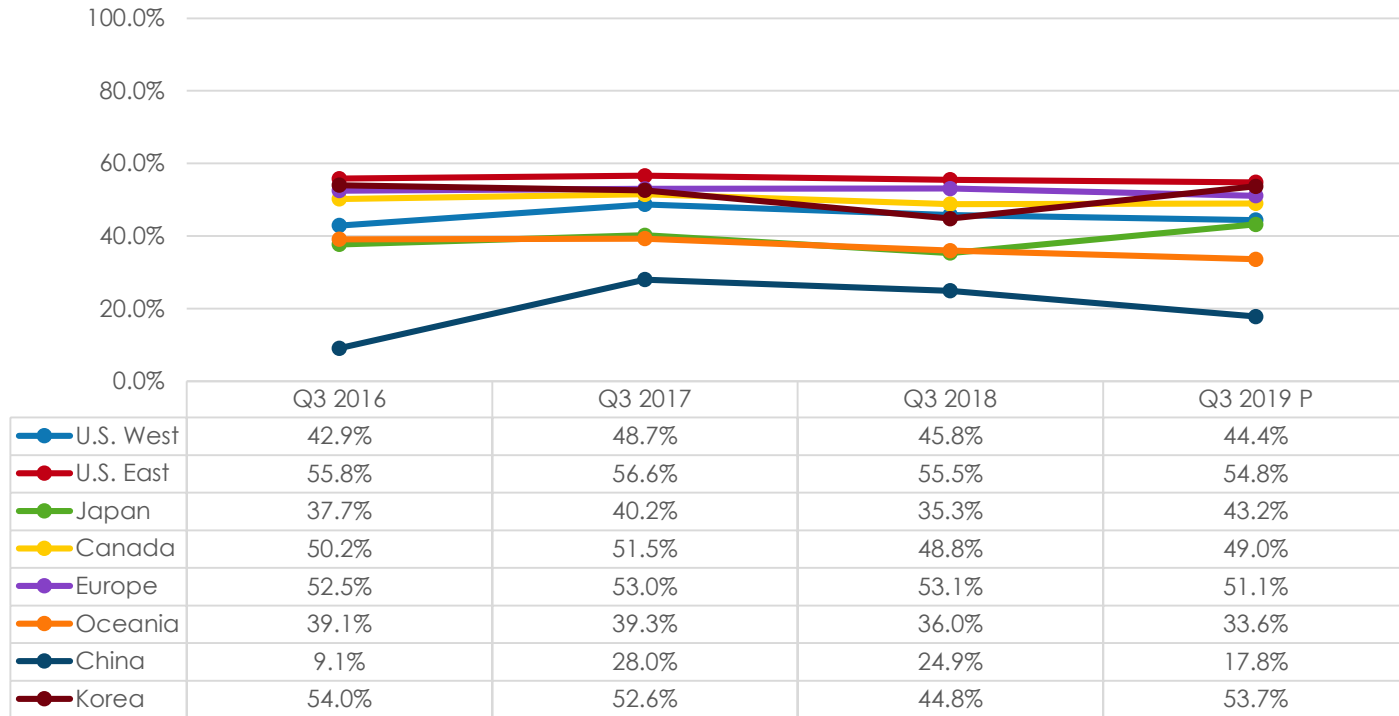
SATISFACTION – HAWAI'I TRIP EXPECTATIONS

COMPARISON OF MEAN SCORES

- **Travel party size:** Those traveling alone from the U.S. West and U.S. East were less satisfied in terms of their pre-trip expectations than were those in larger travel parties.
- **First-time vs Repeat:** First-time visitors from U.S. West, U.S. East, Japan, Canada, and Oceania were more likely to be of the opinion that this trip exceeded their expectations than were repeat travelers from these visitor markets.
- **Age:** Younger travelers from U.S. West, U.S. East, Japan, and Oceania tended to be more satisfied with their trip in terms of prior expectations than older travelers from these visitor markets.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to agree that their trip exceeded their expectations than were males from these visitor markets.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



P= Preliminary Data

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	95.5%	96.4%	95.8%	97.2%	96.2%	91.0%	96.5%	97.1%
On own (self-guided)	84.2%	81.6%	68.1%	84.6%	73.9%	49.4%	54.5%	75.7%
Helicopter/ airplane	4.6%	11.4%	2.0%	7.3%	13.5%	7.4%	21.2%	2.6%
Boat/ submarine/ whale	25.1%	29.4%	9.2%	26.1%	26.6%	15.8%	30.8%	14.4%
Visit towns/communities	52.0%	55.2%	34.3%	55.9%	41.6%	27.7%	38.0%	36.7%
Limo/ van/ bus tour	8.1%	17.3%	22.8%	9.6%	19.1%	32.3%	17.7%	16.3%
Scenic views/ natural landmark	59.4%	67.7%	22.8%	68.3%	62.6%	49.9%	44.9%	50.8%
Movie/ TV/ film location	4.4%	6.1%	3.9%	5.9%	8.0%	11.5%	29.1%	15.1%

ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.8%	96.4%	97.6%	99.0%	96.7%	93.8%	91.8%	98.5%
Beach/ sunbathing	88.1%	84.8%	78.7%	92.7%	89.3%	77.4%	75.5%	80.3%
Bodyboard/ Standup paddle board	16.7%	12.7%	5.2%	19.0%	15.0%	6.9%	2.4%	7.1%
Surfing	7.2%	8.2%	2.4%	12.8%	14.7%	7.4%	9.4%	14.7%
Canoeing/ kayak	8.9%	9.4%	3.9%	7.0%	5.9%	3.2%	3.5%	3.6%
Swim in the ocean	74.8%	71.4%	43.9%	83.5%	78.1%	70.5%	39.0%	50.5%
Snorkel	53.7%	48.7%	26.4%	62.1%	51.9%	28.3%	22.7%	44.0%
Windsurf/ Kitesurf	0.4%	0.3%	0.2%	0.2%	1.3%	0.0%	1.1%	1.1%
Jet ski/ Parasail	2.7%	2.4%	2.7%	1.9%	1.1%	1.1%	0.6%	3.9%
Scuba diving	3.5%	4.3%	1.1%	3.8%	3.4%	0.8%	3.1%	2.1%
Fishing	3.6%	3.8%	0.8%	2.9%	0.7%	0.7%	2.0%	1.1%
Golf	6.1%	4.7%	6.4%	4.8%	2.7%	3.4%	4.4%	3.4%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.8%	96.4%	97.6%	99.0%	96.7%	93.8%	91.8%	98.5%
Run/ Jog/ Fitness walk	22.6%	22.1%	11.4%	23.8%	14.5%	18.0%	11.6%	9.4%
Spa	9.7%	9.5%	7.2%	6.4%	6.1%	5.4%	4.4%	5.8%
Hiking	47.5%	53.3%	18.4%	56.4%	46.8%	24.0%	28.8%	20.1%
Backpack/ camp	1.7%	2.6%	0.2%	2.7%	3.9%	0.3%	4.8%	1.4%
Agritourism	14.0%	15.7%	14.5%	13.8%	9.1%	7.3%	20.1%	20.2%
Sport event/ tournament	2.1%	1.9%	1.1%	1.6%	1.2%	2.5%	1.1%	0.6%
Park/ botanical garden	35.2%	42.8%	20.5%	42.0%	36.3%	28.6%	28.3%	25.4%
Waterpark	1.6%	2.0%	4.7%	2.0%	1.6%	1.1%	10.4%	4.0%
Mountain tube/ waterfall rappel	2.5%	2.4%	0.2%	2.4%	3.8%	0.8%	0.7%	1.4%
Zip-lining	7.8%	6.7%	1.2%	4.0%	2.6%	2.9%	1.4%	1.2%
Skydiving	0.5%	0.5%	0.4%	0.4%	0.6%	0.0%	6.6%	1.1%
All terrain vehicle (ATV)	2.8%	3.4%	0.7%	2.5%	1.4%	4.4%	8.3%	6.9%
Horseback riding	2.2%	3.0%	4.1%	1.6%	2.0%	1.1%	8.4%	0.3%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	97.9%	97.3%	97.8%	98.3%	97.7%	98.0%	93.7%	97.4%
Lunch/ sunset/ dinner/ evening cruise	22.4%	27.0%	12.1%	23.7%	30.5%	19.4%	60.3%	31.3%
Live music/ stage show	30.6%	35.6%	18.8%	32.0%	27.0%	23.9%	10.1%	15.8%
Nightclub/ dancing/ bar/ karaoke	7.9%	7.3%	4.1%	5.9%	6.8%	8.1%	11.4%	2.1%
Fine dining	52.2%	50.4%	42.4%	41.8%	39.2%	35.9%	48.0%	47.4%
Family restaurant	64.2%	58.9%	26.4%	63.0%	49.5%	67.8%	20.7%	39.4%
Fast food	38.3%	37.3%	53.2%	49.0%	48.6%	46.7%	36.9%	56.2%
Food truck	32.8%	33.6%	11.8%	39.4%	31.9%	24.3%	20.3%	50.3%
Café/ coffee house	45.9%	43.1%	52.7%	52.6%	49.9%	56.3%	37.7%	53.9%
Ethnic dining	30.6%	33.8%	8.2%	25.2%	20.0%	15.5%	22.8%	23.4%
Prepared own meal	51.8%	42.8%	25.0%	64.5%	40.3%	25.5%	18.2%	15.2%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	95.9%	95.6%	98.2%	96.5%	96.3%	96.6%	92.7%	97.3%
Mall/ department store	44.2%	41.3%	77.8%	54.9%	61.5%	74.8%	61.9%	76.8%
Designer boutique	16.6%	18.2%	20.0%	17.3%	15.1%	19.8%	11.8%	4.6%
Hotel/ resort store	34.6%	39.1%	35.0%	29.7%	29.5%	35.6%	24.6%	27.8%
Swap meet/ flea market	17.3%	15.2%	4.0%	14.9%	4.4%	10.4%	6.4%	2.6%
Discount/ outlet store	18.0%	17.5%	21.3%	20.5%	18.9%	43.7%	48.0%	59.6%
Supermarket	65.4%	58.2%	72.0%	71.9%	71.7%	49.3%	57.2%	56.6%
Farmer's market	34.3%	30.6%	20.4%	41.0%	28.6%	17.1%	13.1%	8.1%
Convenience store	49.1%	49.8%	44.6%	52.9%	35.7%	67.7%	42.7%	47.9%
Duty free store	5.3%	5.2%	31.0%	7.4%	5.8%	10.9%	60.9%	41.4%
Local shop/ artisan	64.0%	66.4%	11.9%	64.2%	57.9%	50.0%	25.9%	16.8%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	68.8%	76.8%	53.2%	72.9%	71.4%	71.4%	75.3%	65.3%
Historic military site	15.3%	27.5%	14.5%	18.0%	31.6%	43.7%	39.5%	18.3%
Other historical site	26.9%	30.9%	18.8%	27.5%	27.0%	20.9%	26.7%	26.1%
Museum/ art gallery	18.0%	16.9%	5.1%	18.8%	14.3%	15.2%	18.2%	8.0%
Luau/ Polynesian show/ hula show	32.2%	43.6%	14.2%	37.5%	30.8%	26.2%	21.6%	23.6%
Lesson- ex. ukulele, hula, canoe, lei making	7.7%	8.5%	7.4%	8.5%	6.0%	5.9%	14.1%	5.1%
Play/ concert/ theatre	4.1%	4.2%	3.8%	3.6%	3.2%	3.4%	3.8%	6.2%
Art/ craft fair	12.8%	10.1%	3.8%	11.8%	5.9%	7.3%	14.1%	4.5%
Festival event	6.3%	5.2%	2.2%	5.0%	4.3%	5.0%	1.3%	2.0%

ACTIVITIES – TRANSPORTATION

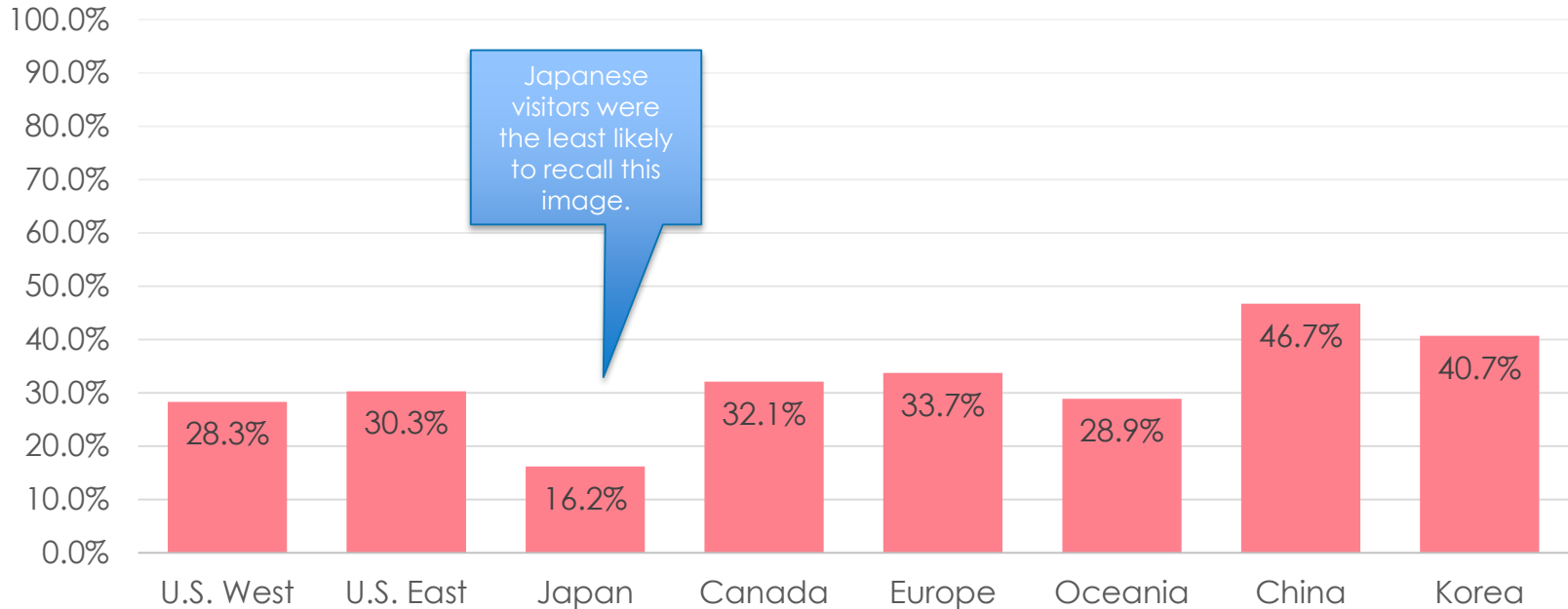
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	92.3%	93.0%	97.1%	95.2%	96.8%	96.9%	86.0%	95.5%
Airport shuttle	15.1%	18.6%	24.1%	17.4%	22.0%	46.0%	12.0%	13.0%
Trolley	2.9%	4.1%	40.9%	6.6%	4.8%	22.2%	6.6%	17.9%
Public bus	4.0%	4.9%	12.0%	8.9%	16.9%	28.1%	15.7%	12.3%
Tour bus/ tour van	9.7%	18.5%	30.7%	11.1%	17.1%	33.6%	24.7%	33.5%
Taxi/ limo	5.7%	8.8%	30.6%	12.7%	22.2%	38.1%	17.7%	21.6%
Rental car	79.7%	73.9%	37.8%	81.1%	66.7%	32.8%	49.2%	50.6%
Ride share	16.3%	18.7%	5.5%	13.7%	18.0%	26.0%	10.8%	14.6%
Bicycle rental	1.7%	2.1%	2.8%	3.0%	2.8%	1.3%	2.3%	2.0%

ACTIVITIES – OTHER

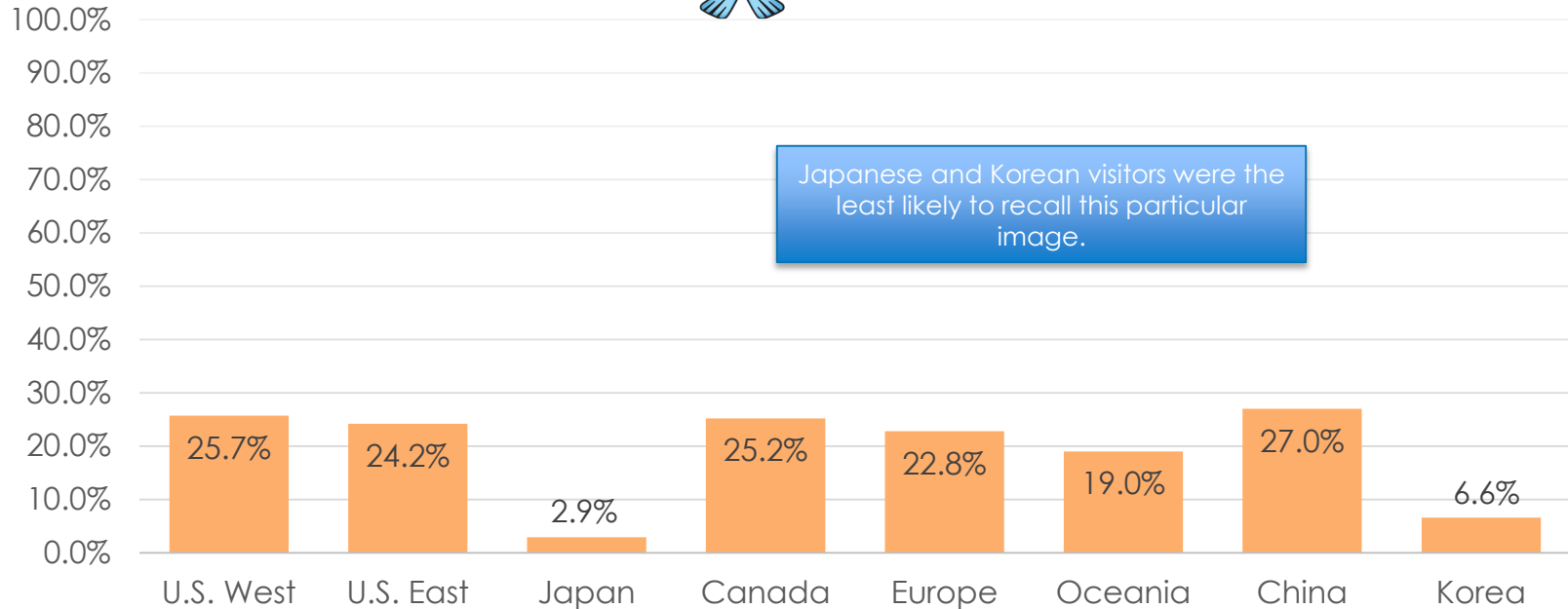
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	28.6%	25.1%	10.8%	15.9%	9.6%	8.9%	20.8%	22.0%
Visit family/ friends	28.1%	24.4%	10.4%	15.1%	8.1%	8.7%	19.1%	21.2%
Volunteer at non-profit	0.8%	1.1%	0.5%	1.0%	1.7%	0.7%	2.7%	0.8%

SECTION – SIGNAGE

HVCB POST-ARRIVAL EXPERIENCE LOGO



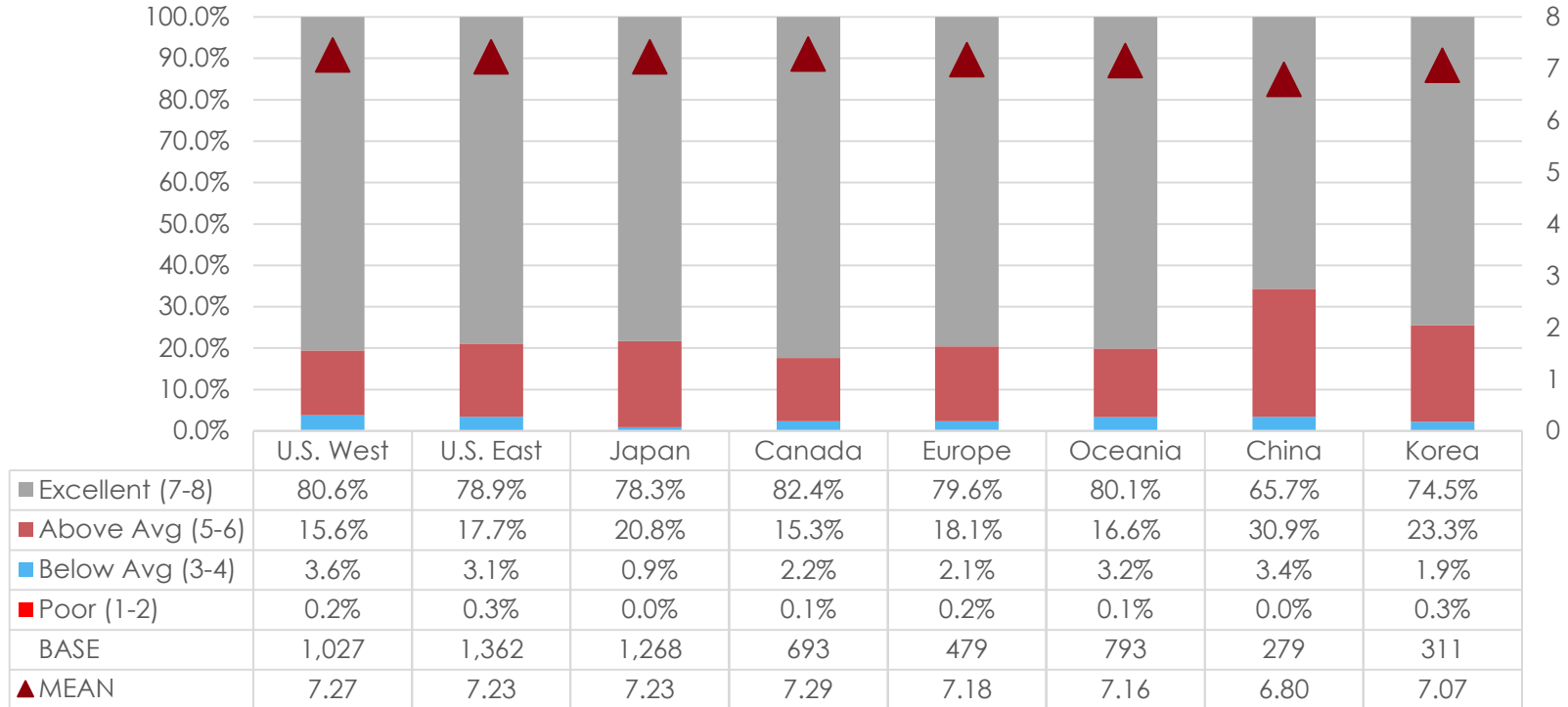
OCEAN SAFETY LOGO



SECTION – O'AHU

SATISFACTION – O‘AHU

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



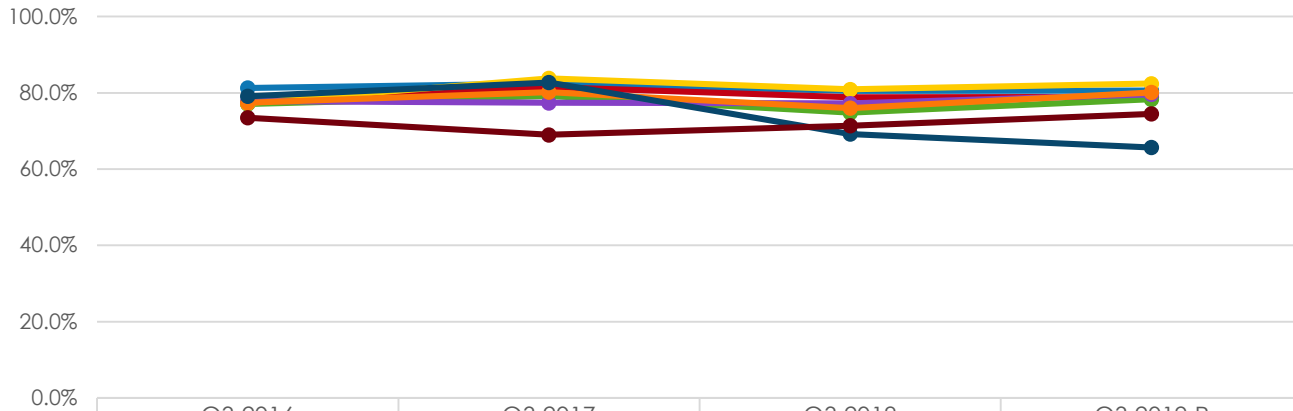
SATISFACTION – O‘AHU

COMPARISON OF MEANS

- **Only visited O‘ahu:** Those from the following visitor markets who visited just O‘ahu during this trip tended to rate the island higher compared to those who also visited a Neighbor Island: U.S. West, U.S. East, Japan, and Europe.
- **First-time vs Repeat:** First-time visitors from China were more satisfied with their stay on O‘ahu than were repeat visitors from this market.
- **Age:** Younger travelers from U.S. West and U.S. East tended to be more satisfied with their stay on O‘ahu than older travelers from these visitor markets.
- **Gender:** Female travelers from U.S. West, U.S. East, and Oceania were more satisfied with their stay on O‘ahu than were males from these visitor markets.
- **College graduate:** Less educated travelers from Oceania were more satisfied with their stay on island than were those with a college degree from this visitor market.

SATISFACTION – O‘AHU

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

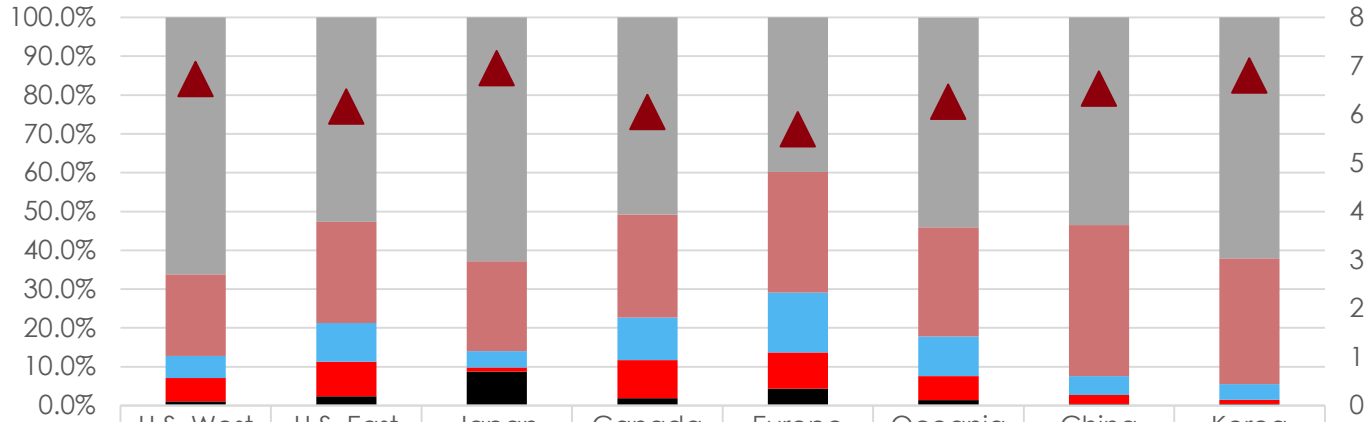


	Q3 2016	Q3 2017	Q3 2018	Q3 2019 P
U.S. West	81.3%	82.4%	80.5%	80.6%
U.S. East	77.2%	81.5%	78.8%	78.9%
Japan	77.1%	79.2%	74.8%	78.3%
Canada	77.3%	83.8%	80.9%	82.4%
Europe	77.8%	77.4%	77.2%	79.6%
Oceania	77.4%	80.2%	76.0%	80.1%
China	79.1%	82.7%	69.2%	65.7%
Korea	73.5%	69.0%	71.4%	74.5%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

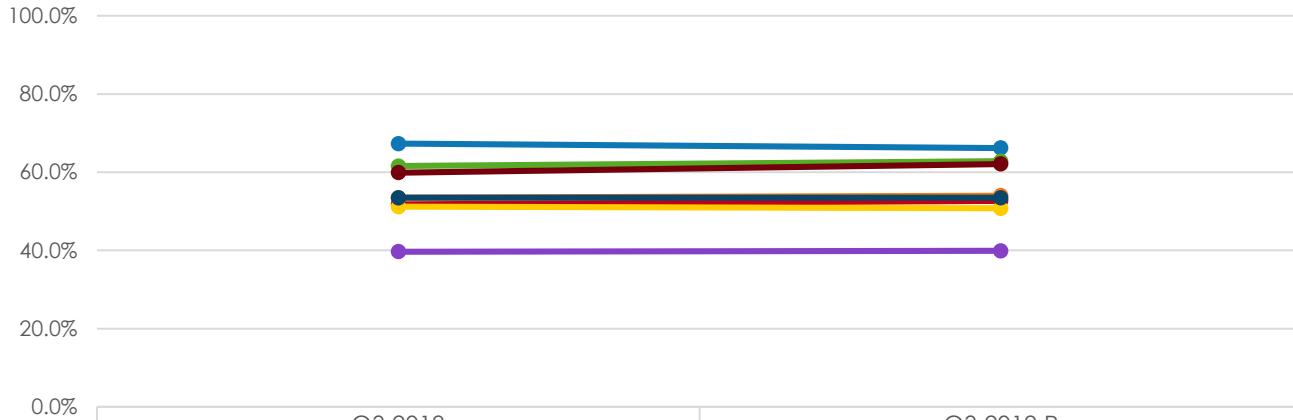
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	66.2%	52.7%	62.8%	50.8%	39.9%	54.0%	53.5%	62.1%
■ Somewhat likely (5-6)	21.0%	26.0%	23.2%	26.5%	31.1%	28.1%	38.9%	32.4%
■ Somewhat unlikely (3-4)	5.7%	10.0%	4.2%	11.0%	15.4%	10.2%	4.9%	4.0%
■ Very unlikely (1-2)	6.0%	8.9%	1.1%	9.8%	9.3%	6.2%	2.3%	1.1%
■ Not sure	1.1%	2.4%	8.7%	1.9%	4.4%	1.4%	0.4%	0.4%
BASE	878	973	1,212	531	316	695	214	267
▲ MEAN	6.73	6.16	6.95	6.05	5.69	6.26	6.53	6.80

LIKELIHOOD OF RETURN VISIT – O‘AHU

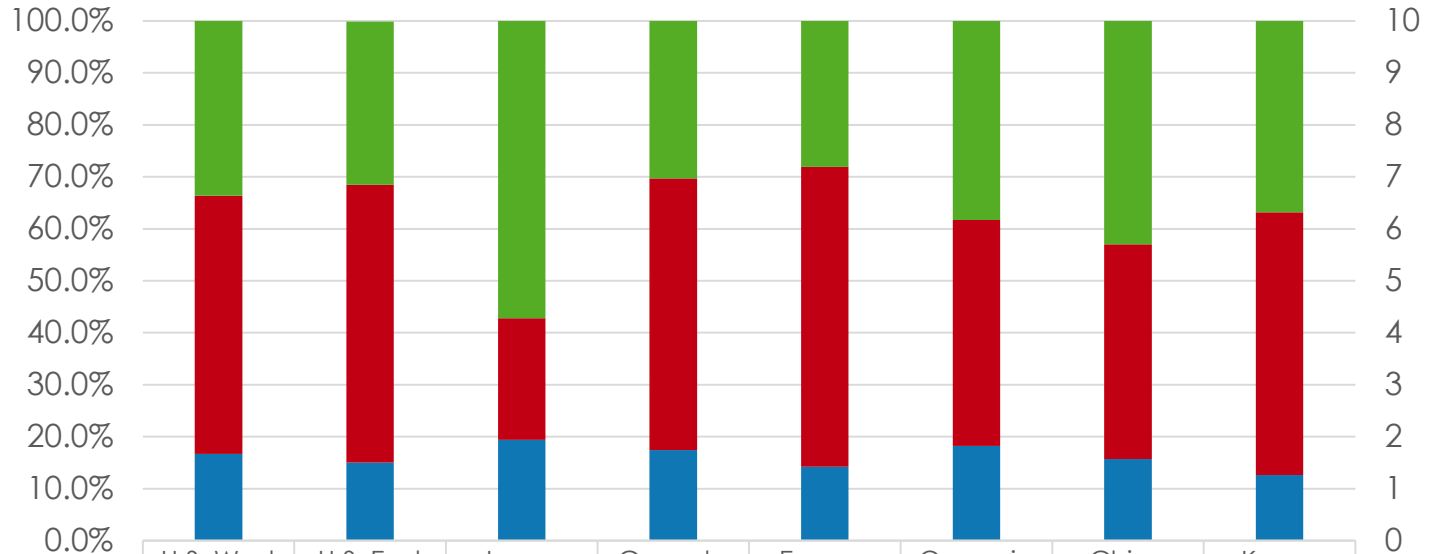
TOP BOX – VERY LIKELY (7-8)



	Q3 2018	Q3 2019 P
U.S. West	67.3%	66.2%
U.S. East	51.8%	52.7%
Japan	61.6%	62.8%
Canada	51.2%	50.8%
Europe	39.7%	39.9%
Oceania	53.5%	54.0%
China	53.5%	53.5%
Korea	59.9%	62.1%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	33.6%	31.4%	57.2%	30.3%	28.1%	38.3%	43.0%	36.8%
No Prior Awareness	49.7%	53.5%	23.4%	52.3%	57.7%	43.5%	41.3%	50.6%
Unsure	16.7%	15.0%	19.4%	17.4%	14.2%	18.2%	15.7%	12.6%
BASE	898	996	1,218	545	324	705	216	267

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Atlantis Submarine & Cruises	2.5%	5.3%	7.0%	3.0%	4.2%	3.8%	35.7%	6.3%
Bernice P. Bishop Museum	2.7%	4.4%	1.8%	3.6%	3.1%	1.7%	4.3%	3.5%
Byodo-In Temple	7.3%	10.8%	0.7%	15.9%	11.7%	4.9%	4.4%	2.3%
Chinatown & Honolulu Art District	12.3%	13.7%	14.3%	15.3%	16.7%	9.8%	46.4%	11.8%
Diamond Head State Monument	24.3%	38.3%	23.7%	46.6%	48.7%	33.6%	16.7%	46.6%
Dole Plantation	32.5%	37.4%	14.1%	39.5%	27.7%	23.6%	42.7%	44.1%
Haleiwa	27.6%	22.8%	26.2%	28.5%	18.8%	13.3%	7.5%	16.1%
Hanauma Bay Nature Reserve	22.8%	24.6%	15.8%	37.0%	32.5%	18.3%	38.8%	37.4%
Harold L. Lyon Arboretum	0.8%	1.6%	0.5%	1.1%	0.3%	0.2%	1.0%	3.0%
Hawaii State Art Museum or Honolulu Museum of Art	2.9%	2.7%	2.9%	3.0%	2.8%	4.5%	1.9%	3.0%
Hawaiian Mission Houses, Historic Site and Archive	1.1%	1.8%	0.1%	0.8%	2.2%	1.6%	2.5%	2.6%
Hawaii’s Plantation Village	1.2%	1.7%	0.8%	1.9%	3.8%	2.1%	2.3%	3.3%
Honolulu Zoo	4.7%	5.2%	6.9%	8.9%	7.0%	8.7%	7.8%	7.7%

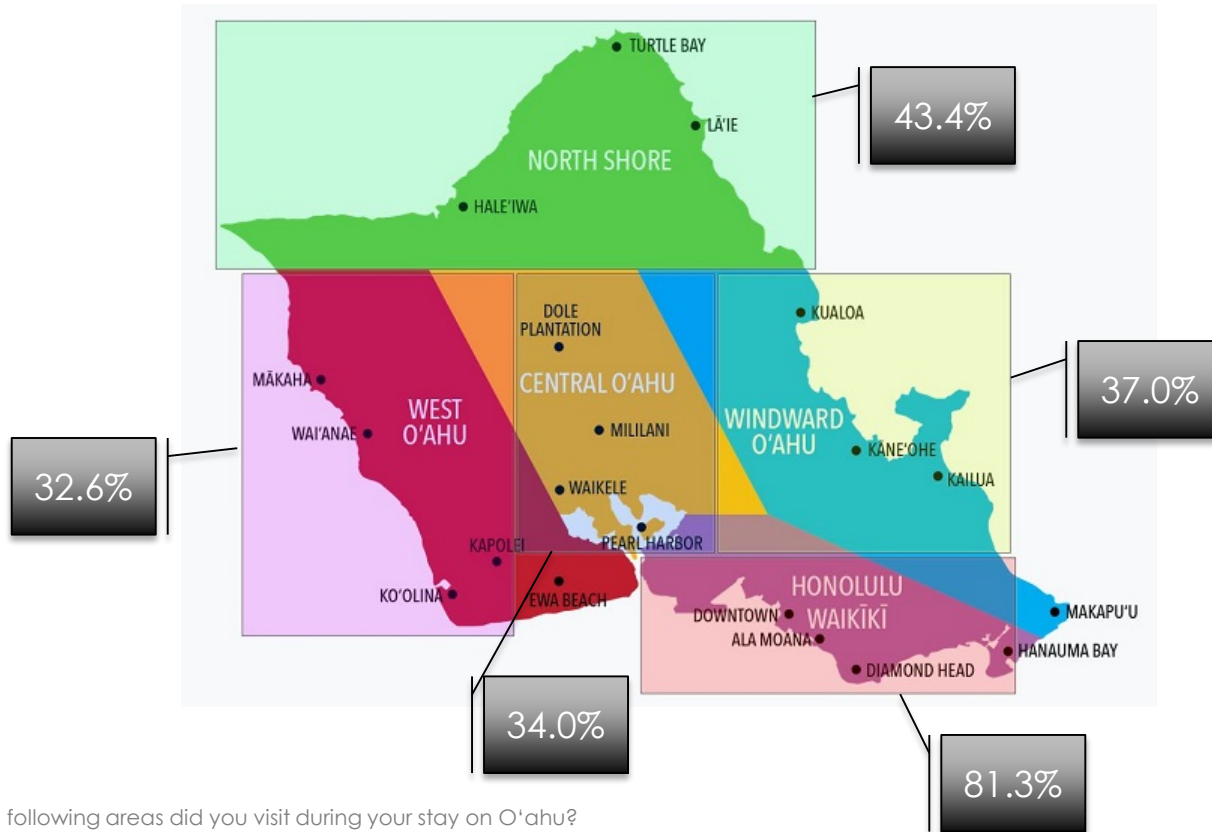
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Ho‘omaluhia Botanical Garden	4.6%	5.1%	0.8%	7.0%	8.9%	2.7%	2.4%	3.5%
Iolani Palace State Monument	5.6%	10.5%	12.0%	7.4%	17.5%	6.7%	21.0%	20.0%
Kaiwi State Scenic Shoreline/ Makapuu Trail	6.0%	8.2%	6.0%	7.2%	4.8%	1.7%	16.4%	3.8%
Kakaako Street Art	2.1%	1.5%	15.2%	2.5%	1.5%	1.2%	12.9%	7.2%
Koko Head Crater Trail	6.4%	7.8%	2.6%	10.2%	10.5%	5.1%	7.7%	5.3%
Kualoa Private Nature Reserve	10.4%	12.6%	7.6%	15.3%	13.6%	10.7%	28.8%	14.7%
Lanikai or Kailua Beach	30.8%	33.0%	26.5%	39.1%	43.0%	16.3%	13.6%	21.3%
Manoa Falls & Trail	11.7%	12.9%	3.6%	17.8%	18.6%	5.0%	10.9%	4.0%
National Memorial Cemetery of the Pacific	8.7%	16.4%	0.7%	11.3%	16.4%	13.5%	8.0%	2.3%
Nuuanu Pali Lookout	5.9%	9.6%	1.5%	10.0%	8.3%	4.9%	23.0%	4.4%
North Shore Beaches	52.2%	53.2%	18.3%	58.9%	53.8%	38.5%	34.8%	35.0%

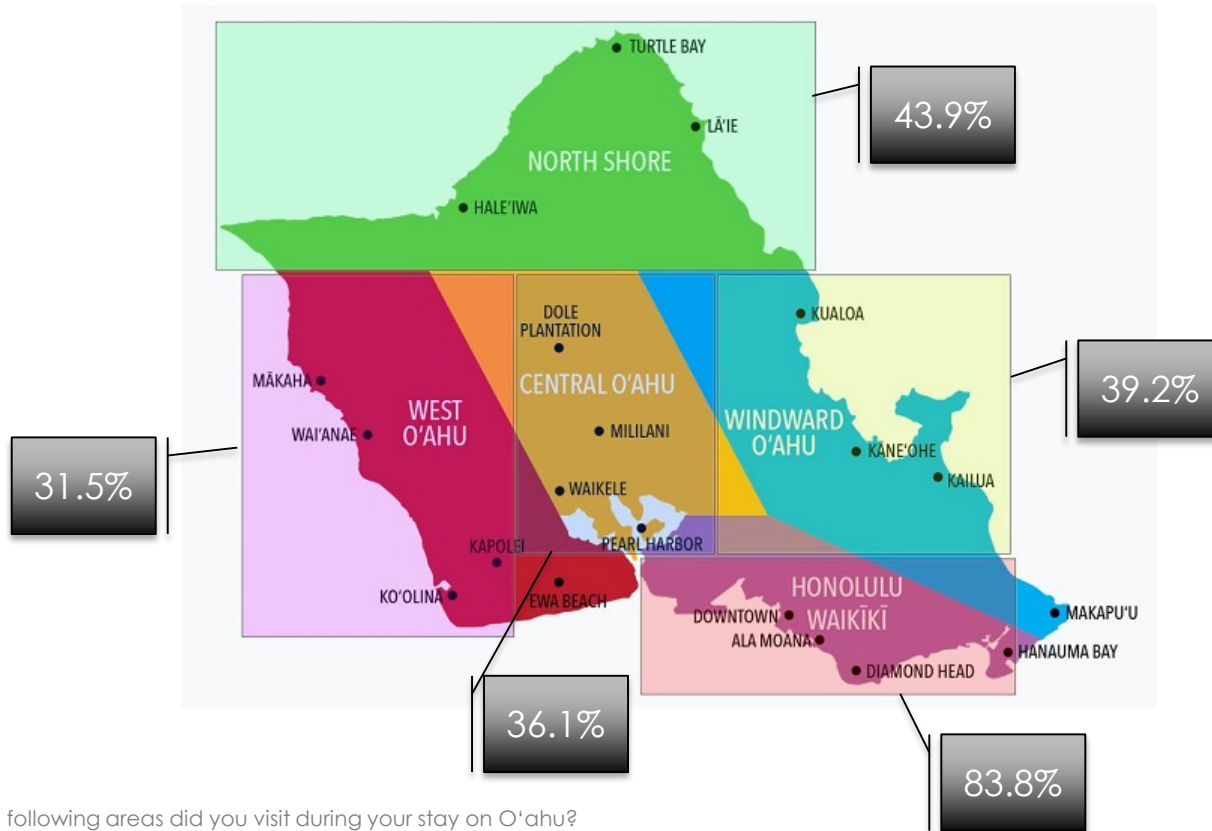
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pearl Harbor	31.2%	52.1%	7.7%	43.5%	62.7%	43.5%	49.6%	19.1%
Polynesian Cultural Center	20.1%	22.0%	3.4%	22.4%	16.3%	10.8%	22.8%	15.8%
Queen Emma’s Summer Palace	1.9%	2.9%	0.8%	2.1%	3.5%	1.6%	2.9%	1.8%
Sea Life Park Hawaii	5.7%	6.1%	2.9%	6.5%	4.1%	2.5%	6.6%	3.0%
Waikiki Aquarium	5.0%	6.5%	5.1%	6.1%	5.8%	4.1%	7.0%	4.5%
Waimanalo Beach Park	11.4%	12.0%	4.7%	17.2%	22.1%	6.2%	10.6%	11.9%
Waimea Valley	15.8%	18.9%	3.0%	23.4%	20.3%	11.2%	4.9%	3.3%

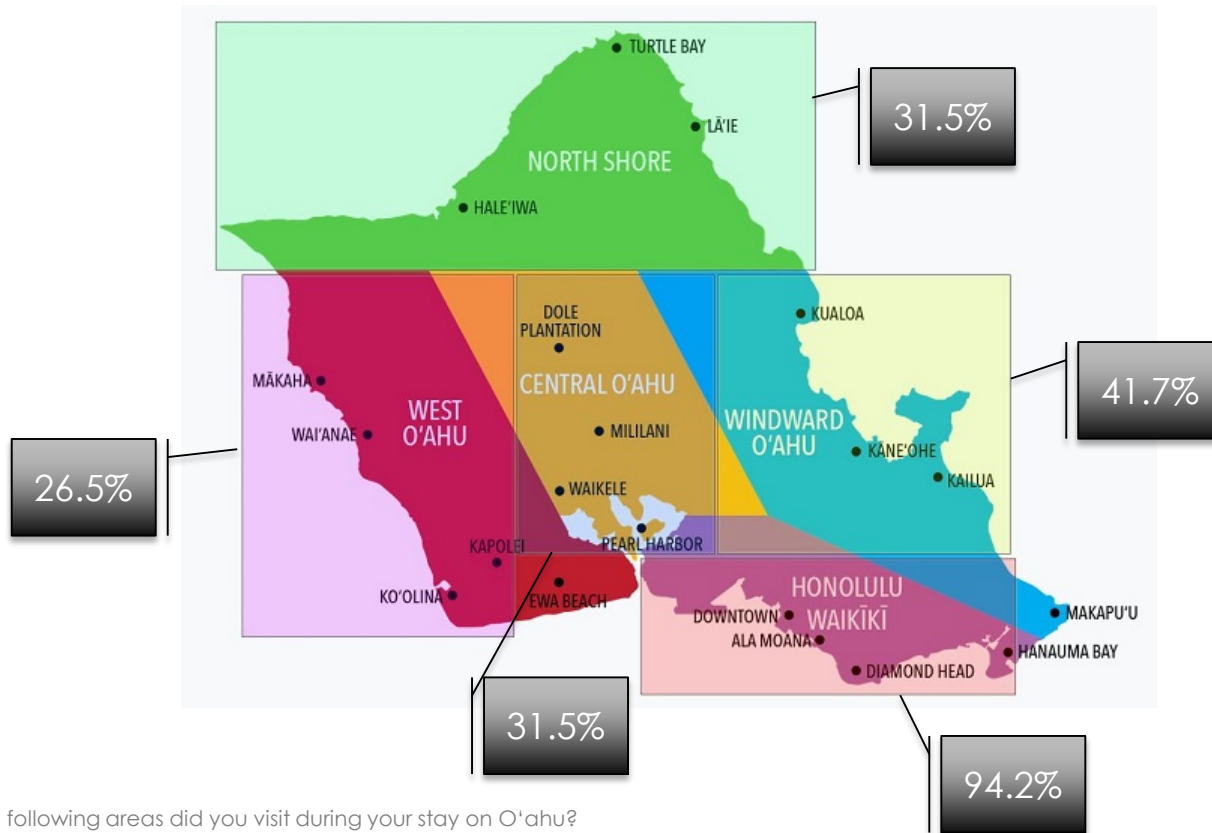
AREAS VISITED U.S. WEST



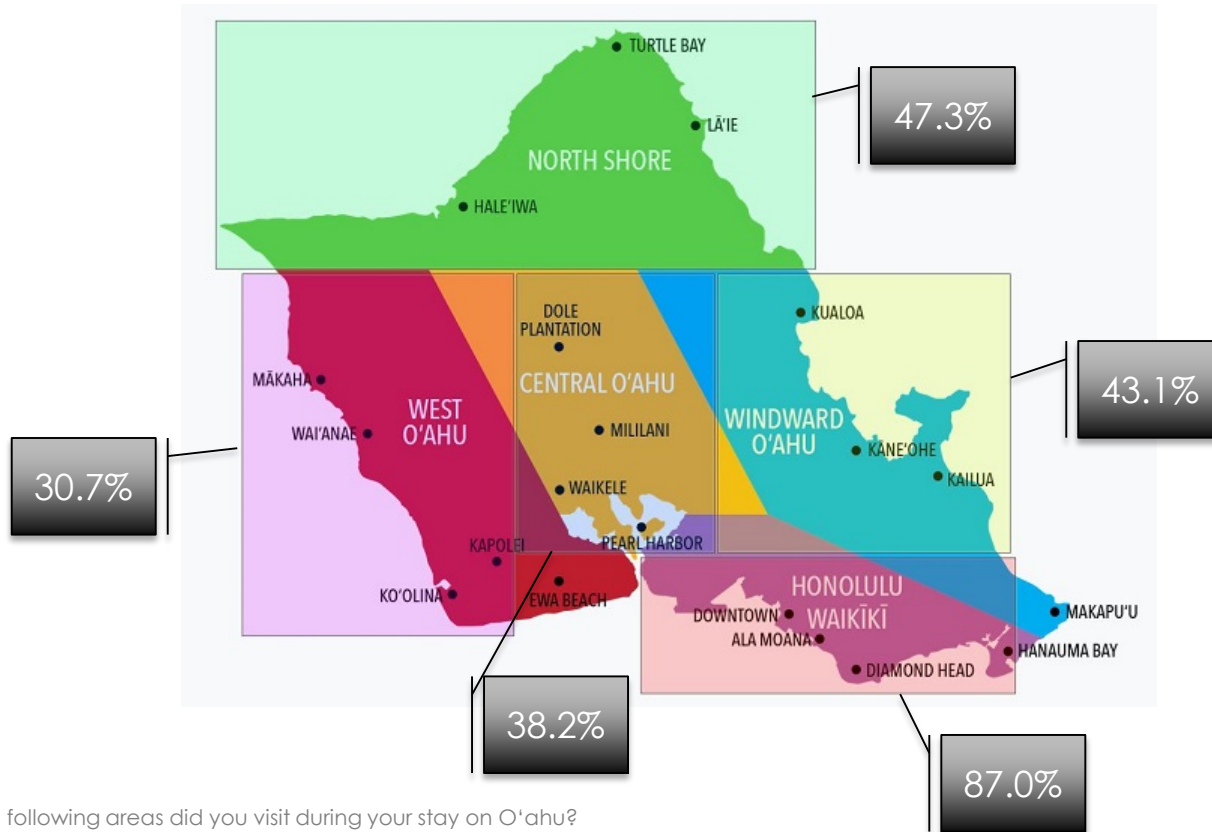
AREAS VISITED U.S. EAST



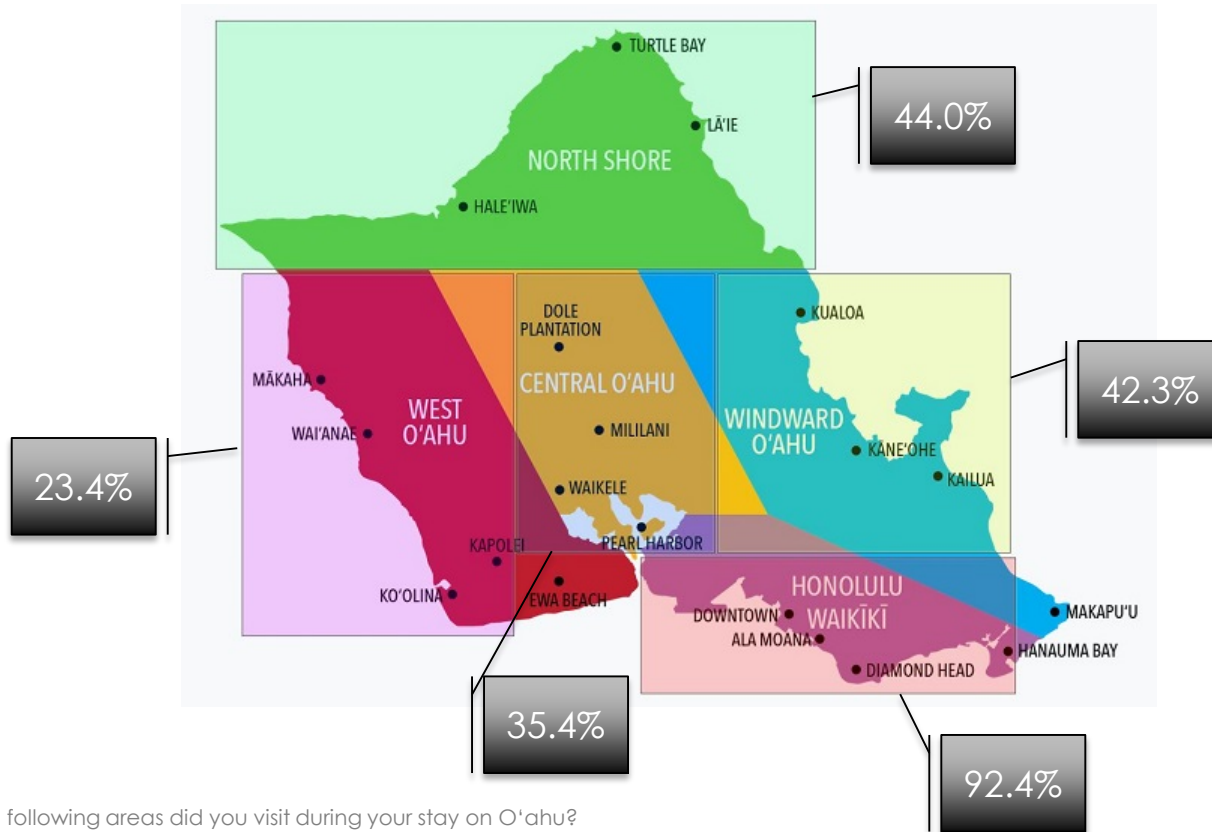
AREAS VISITED JAPAN



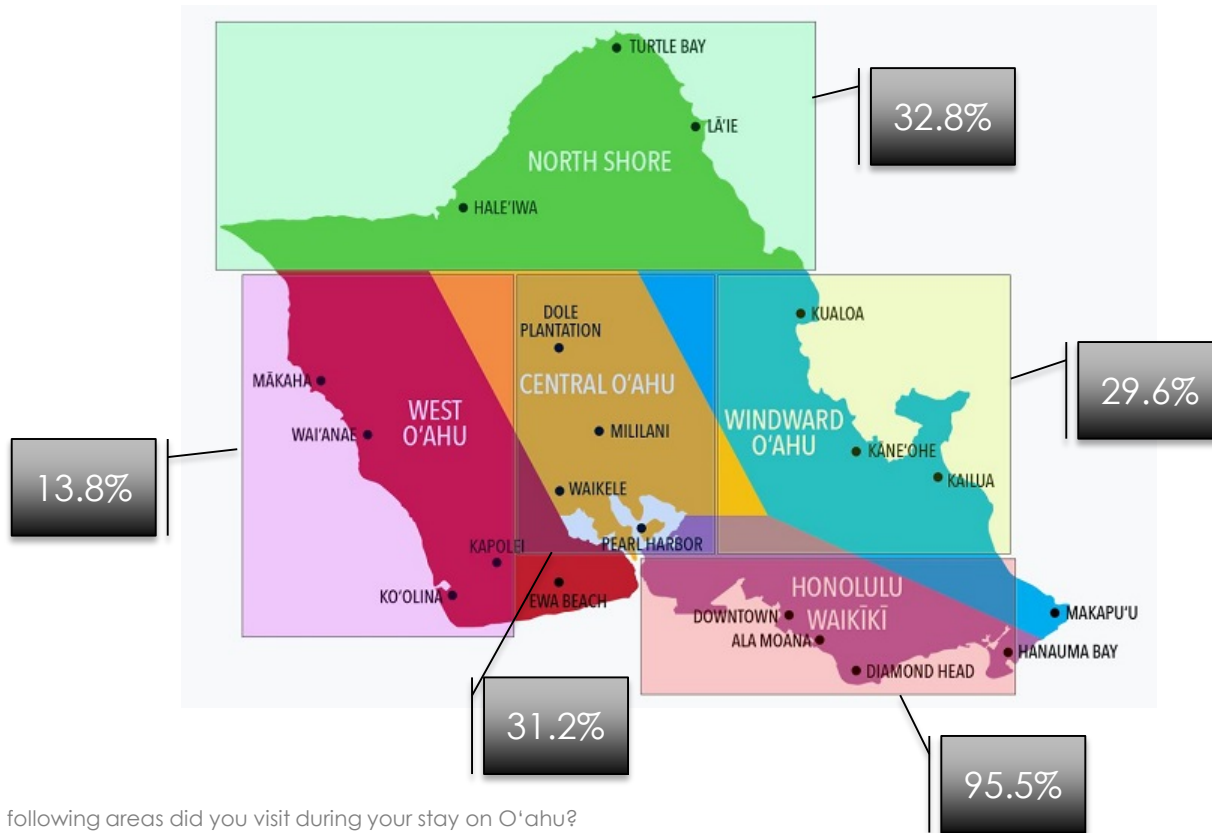
AREAS VISITED CANADA



AREAS VISITED EUROPE



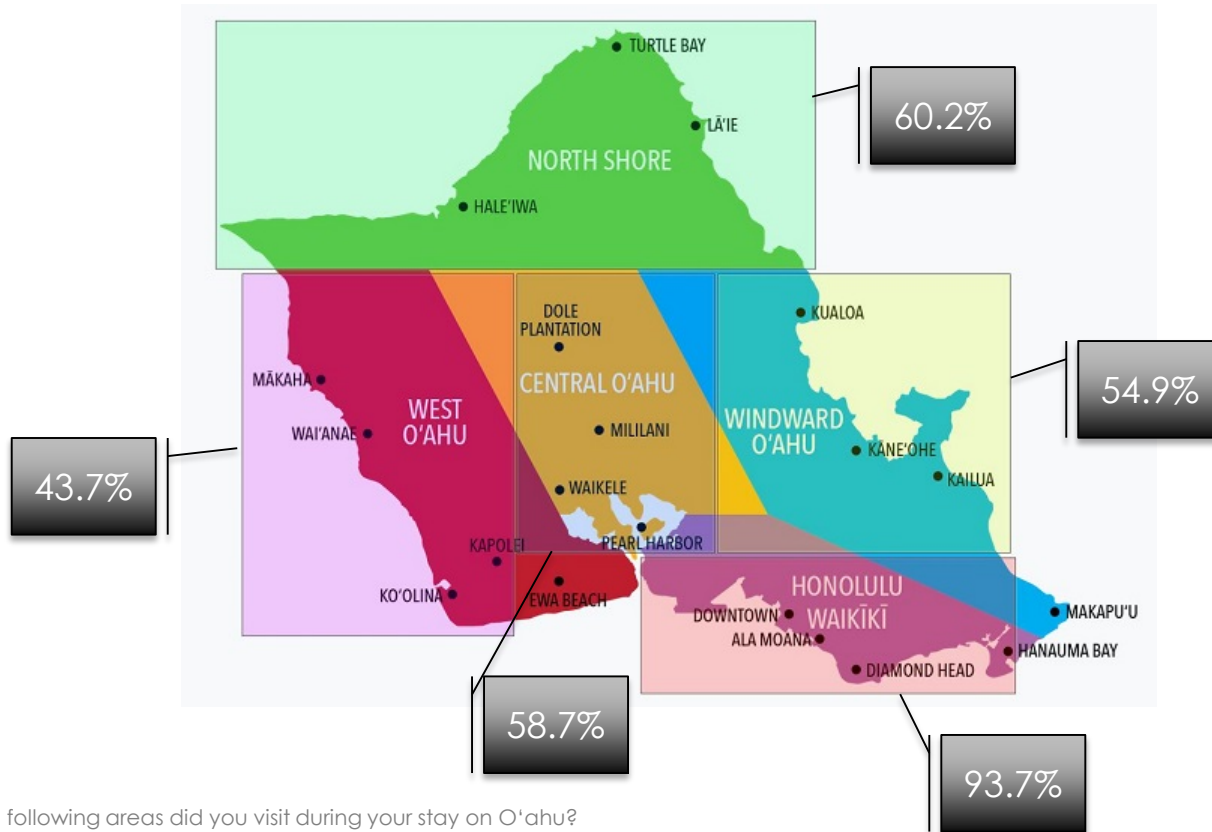
AREAS VISITED OCEANIA



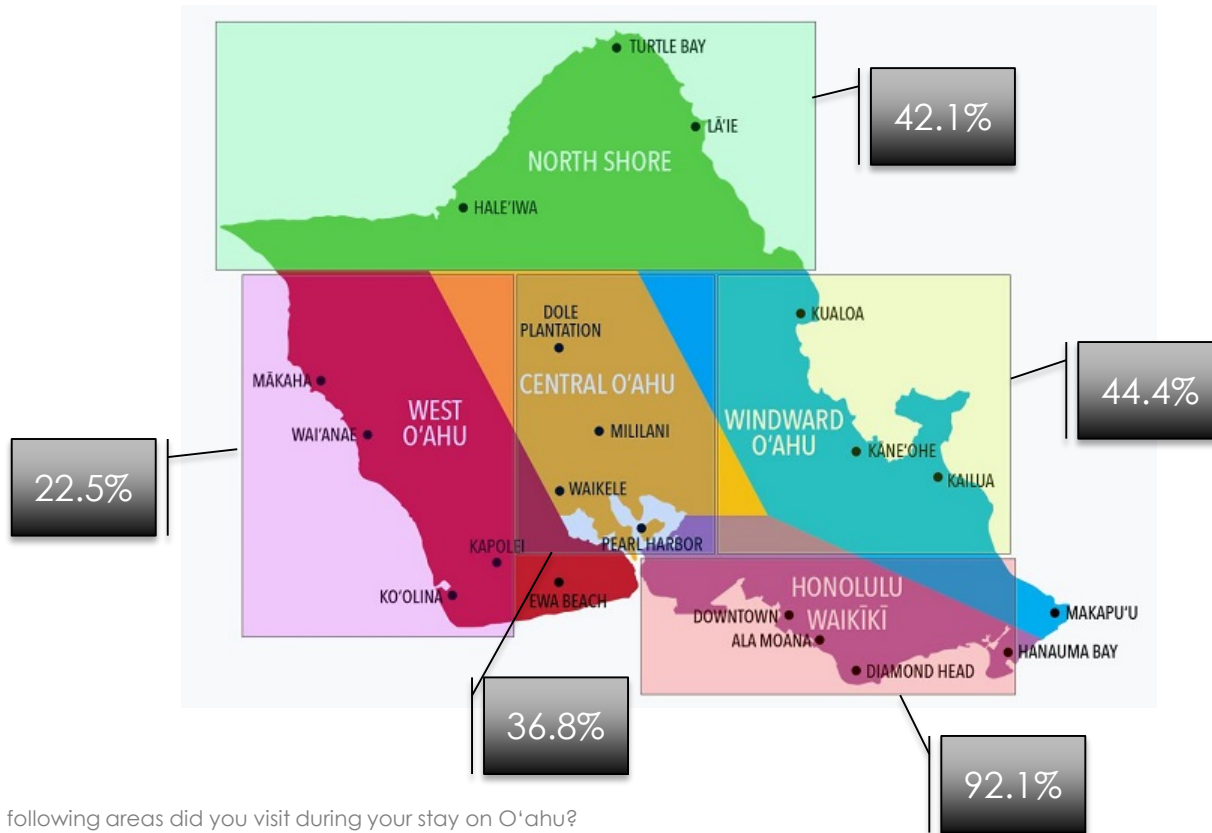
57 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

AREAS VISITED CHINA

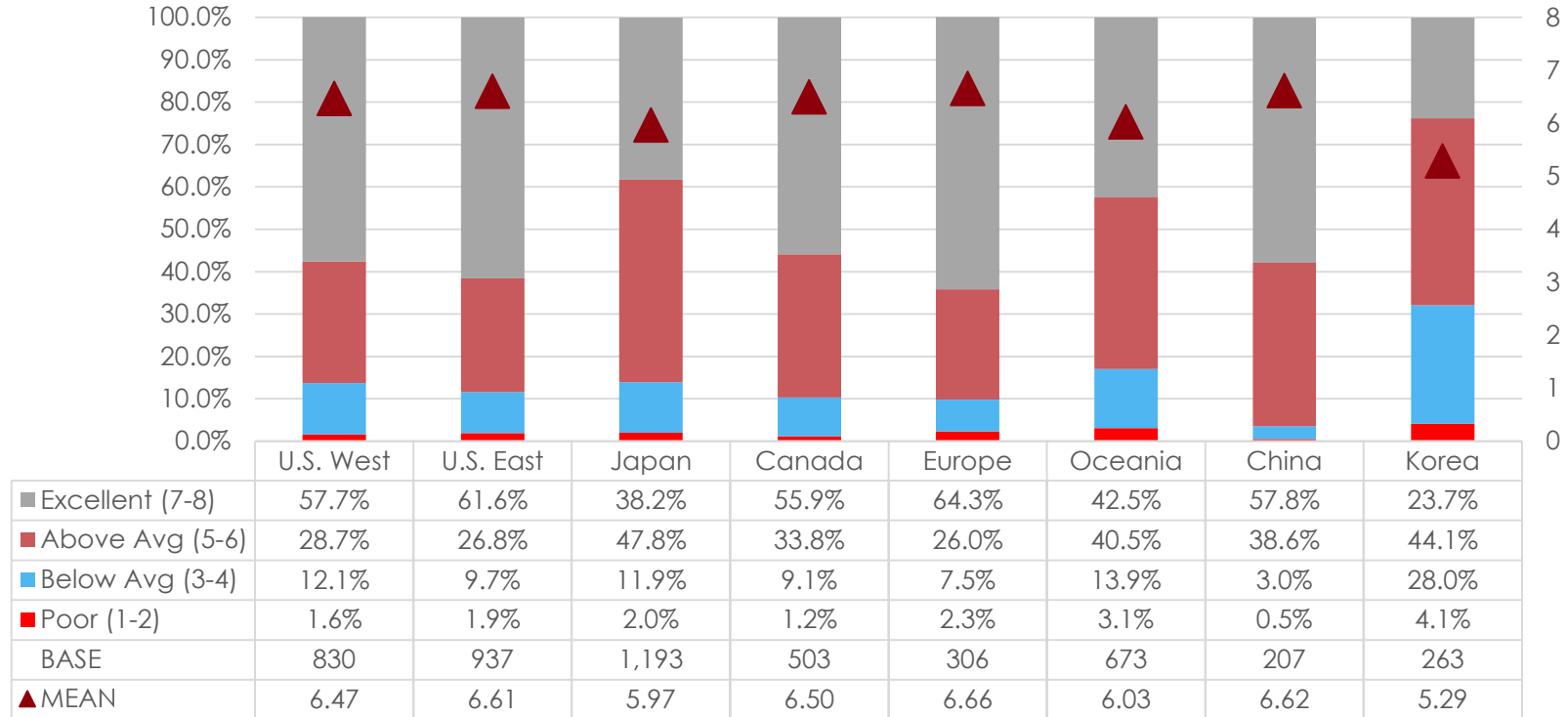


AREAS VISITED KOREA



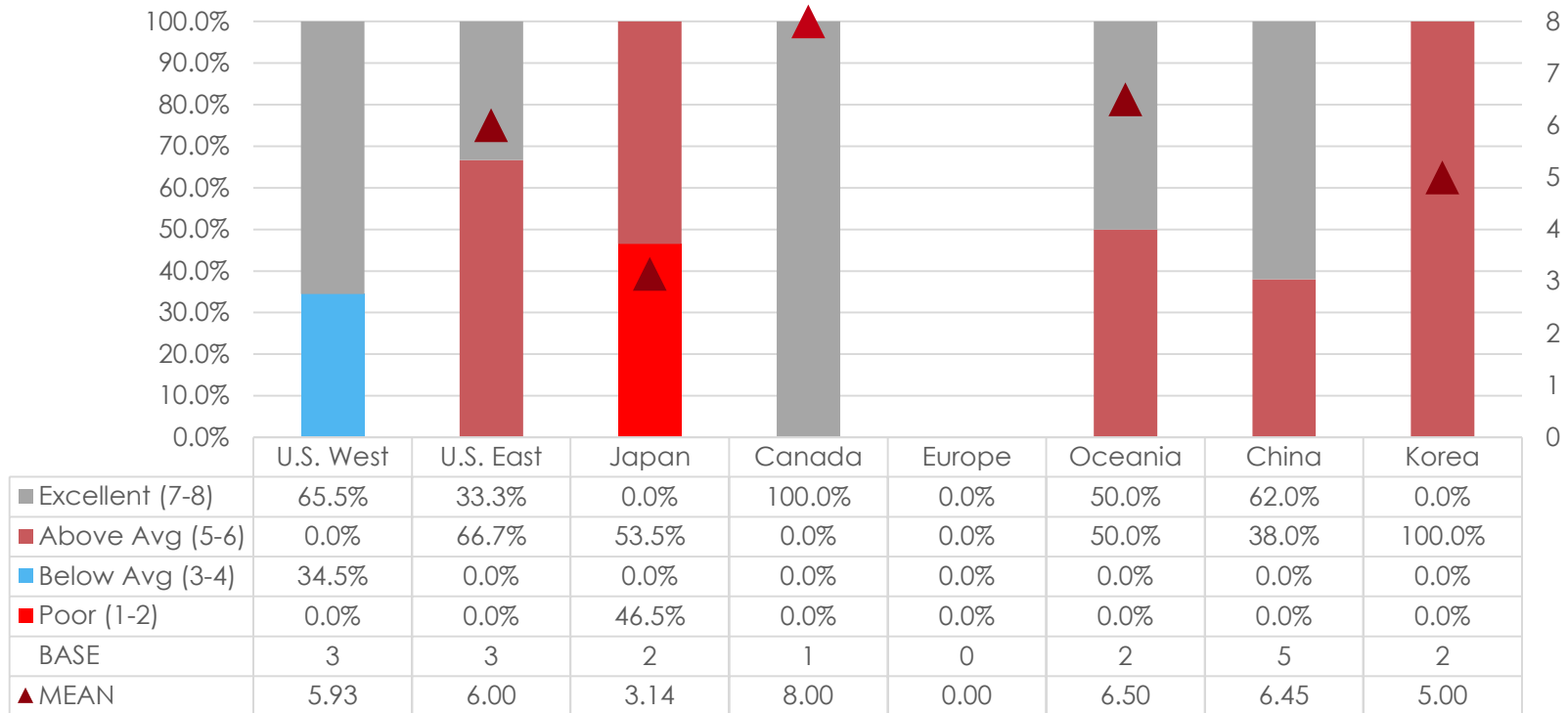
SATISFACTION – Daniel K. Inouye International Airport

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

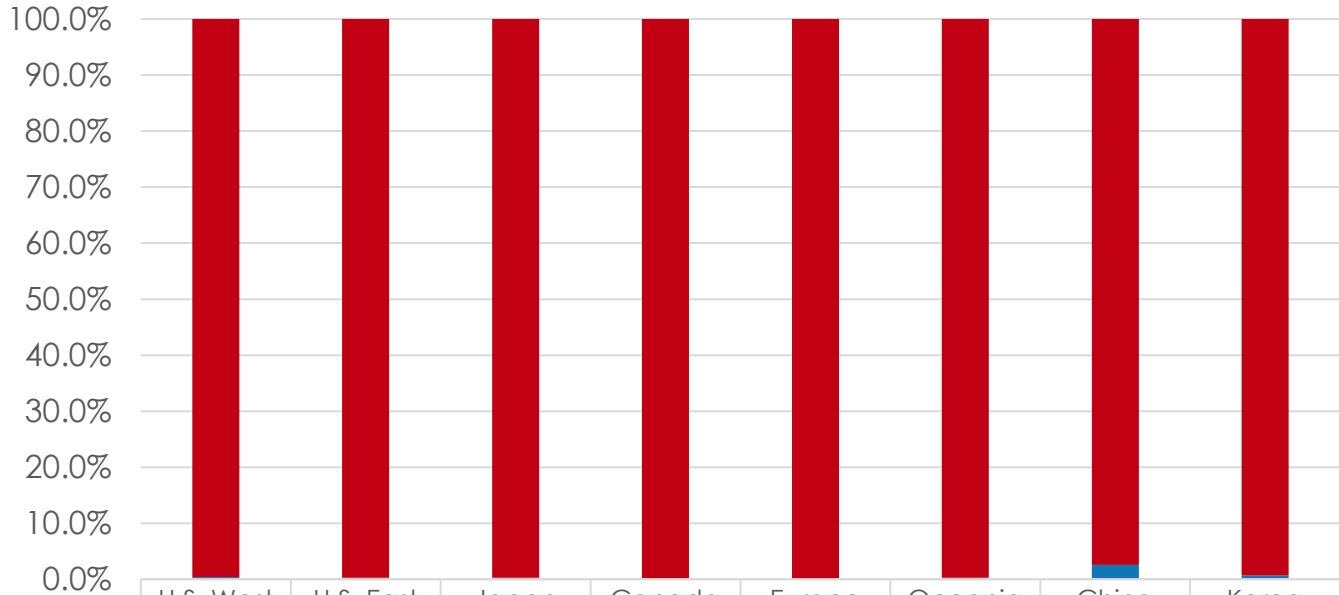


SATISFACTION – Honolulu Harbor

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



TRANSPAC TRAVEL OPTIONS – O‘AHU

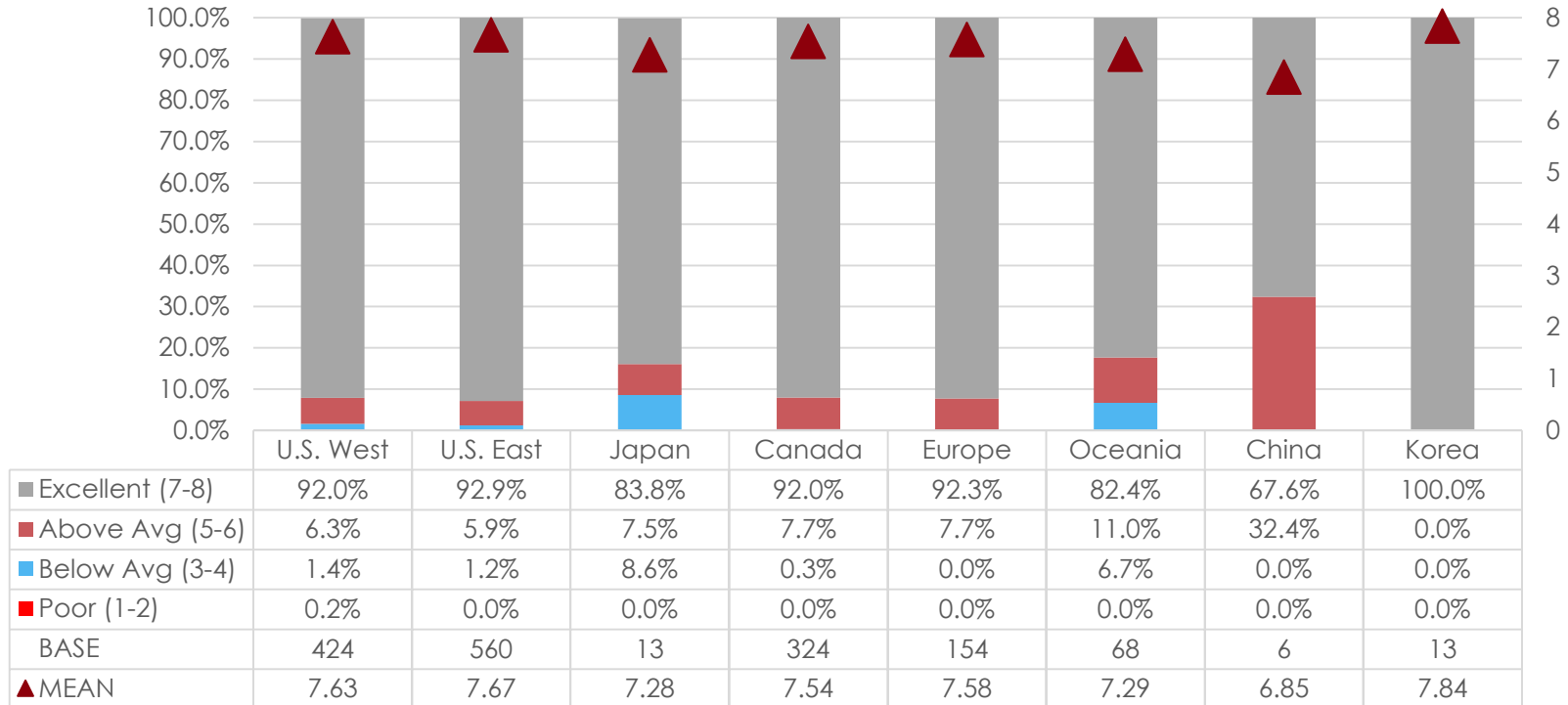


■ Air/ Flight	99.6%	99.7%	99.7%	99.8%	100.0%	99.7%	97.4%	99.3%
■ Cruise Ship/ Ocean Vessel	0.4%	0.3%	0.3%	0.2%	0.0%	0.3%	2.6%	0.7%
BASE	836	941	1,196	505	307	676	212	265

SECTION – KAUA‘I

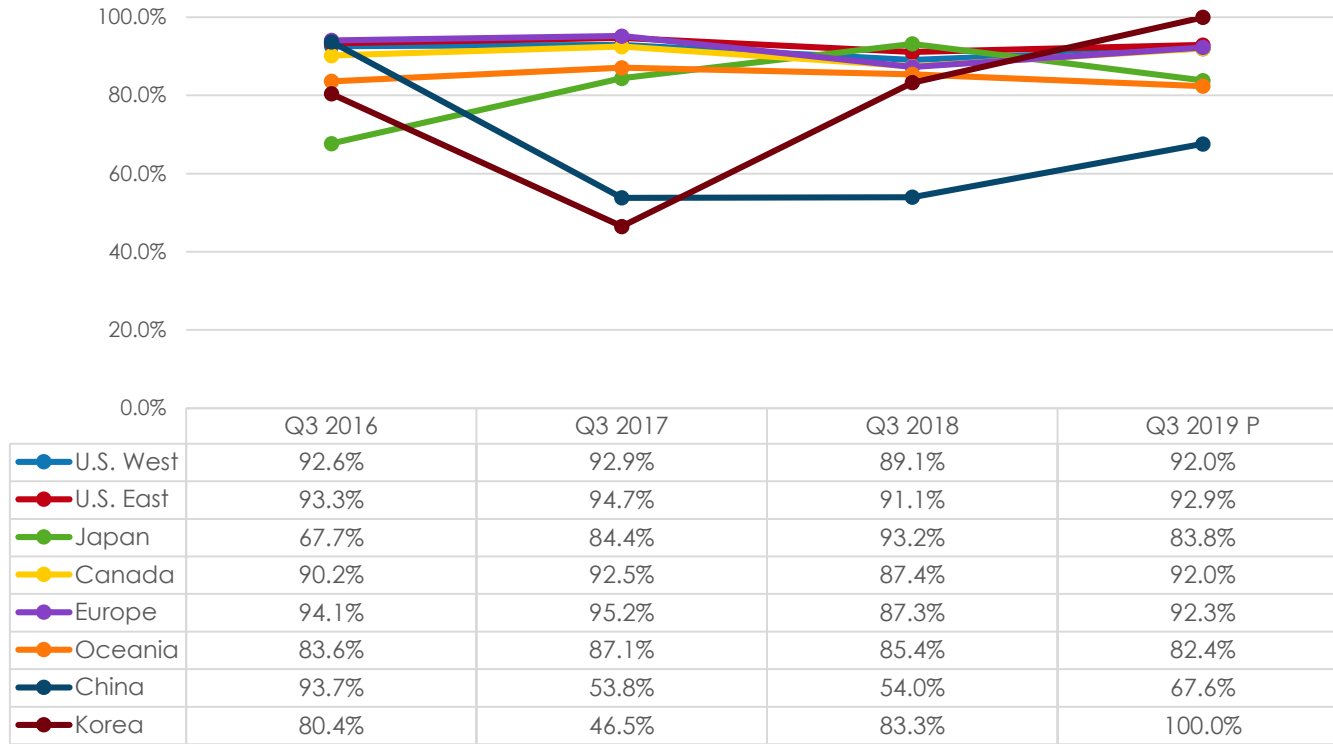
SATISFACTION – KAUA‘I

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



SATISFACTION – KAUA‘I

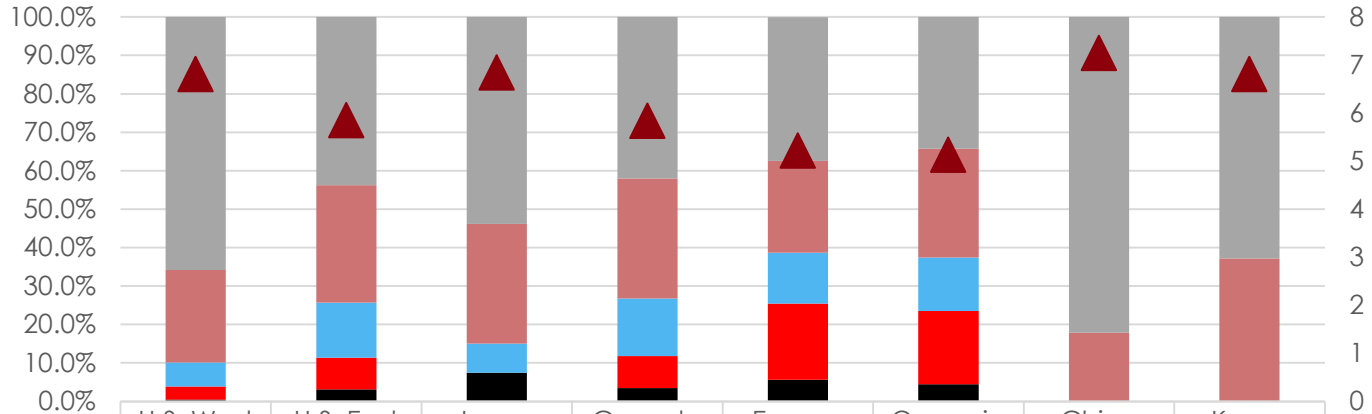
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

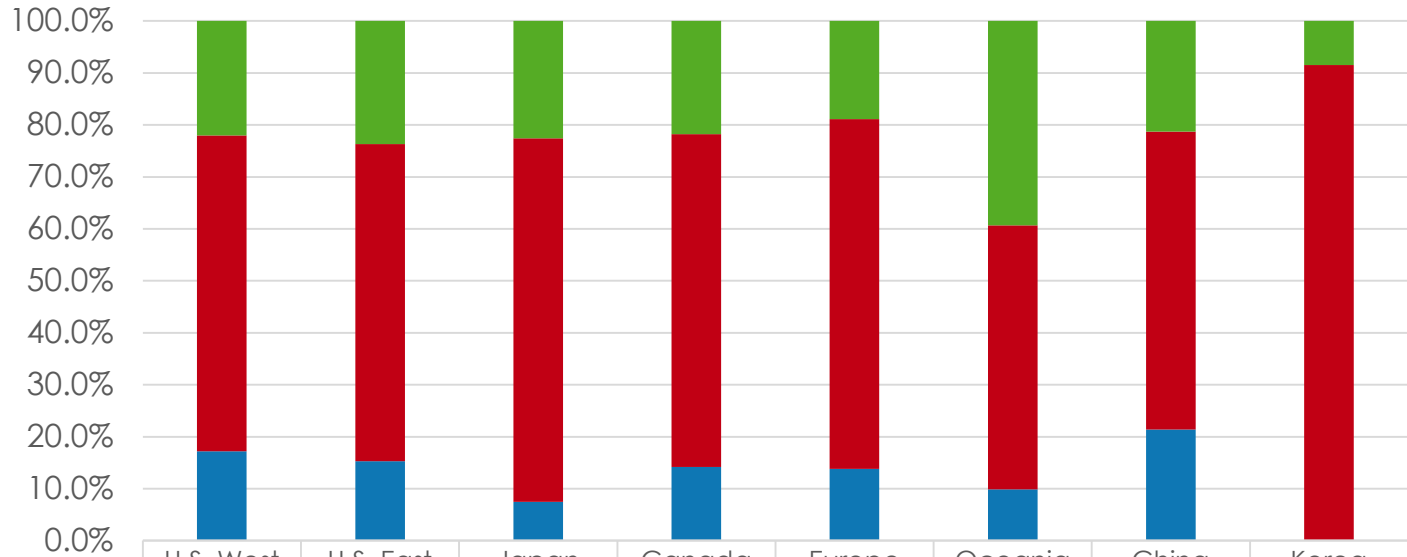
LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	65.8%	43.8%	53.8%	42.0%	37.3%	34.3%	82.1%	62.8%
Somewhat likely (5-6)	24.1%	30.5%	31.2%	31.2%	23.9%	28.3%	17.9%	37.2%
Somewhat unlikely (3-4)	6.2%	14.3%	7.5%	15.0%	13.3%	13.9%	0.0%	0.0%
Very unlikely (1-2)	3.4%	8.3%	0.0%	8.3%	19.8%	19.0%	0.0%	0.0%
Not sure	0.5%	3.1%	7.5%	3.5%	5.6%	4.5%	0.0%	0.0%
BASE	405	513	13	312	141	61	5	13
MEAN	6.81	5.85	6.84	5.84	5.22	5.13	7.25	6.81

AIDED ADVERTISING AWARENESS – KAUA'I



■ Aided Ad Awareness	22.0%	23.7%	22.6%	21.8%	18.9%	39.3%	21.4%	8.5%
■ No Prior Awareness	60.8%	61.0%	69.9%	64.0%	67.3%	50.8%	57.3%	91.5%
■ Unsure	17.2%	15.3%	7.5%	14.2%	13.8%	9.9%	21.4%	0.0%
BASE	415	521	13	318	147	61	5	13

ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Fern Grotto	10.9%	12.2%	60.2%	12.6%	9.2%	13.4%	0.0%	0.0%
Hanalei Town	56.7%	42.6%	30.1%	56.9%	56.9%	40.4%	0.0%	30.0%
Hanalei Beach	53.4%	38.9%	37.6%	59.8%	64.5%	42.9%	64.1%	30.0%
Kalalau Trail	13.2%	12.4%	22.6%	25.6%	24.2%	6.0%	0.0%	7.2%
Kalapaki Beach	27.7%	23.5%	0.0%	32.5%	23.6%	33.0%	39.3%	15.7%
Bike Path in Kapaa	6.3%	5.8%	8.6%	8.5%	7.1%	5.0%	0.0%	7.2%
Kaua‘i Museum	5.9%	2.1%	0.0%	3.9%	2.7%	0.0%	0.0%	0.0%
Ke‘e Beach	17.6%	11.6%	7.5%	19.6%	24.3%	4.5%	0.0%	7.2%
Kilauea Lighthouse	31.2%	27.3%	15.0%	34.5%	31.8%	21.5%	0.0%	14.3%
Koke‘e	11.5%	11.0%	15.0%	18.1%	22.0%	3.0%	17.9%	0.0%

ATTRACTIONS – KAUA‘I (cont.)

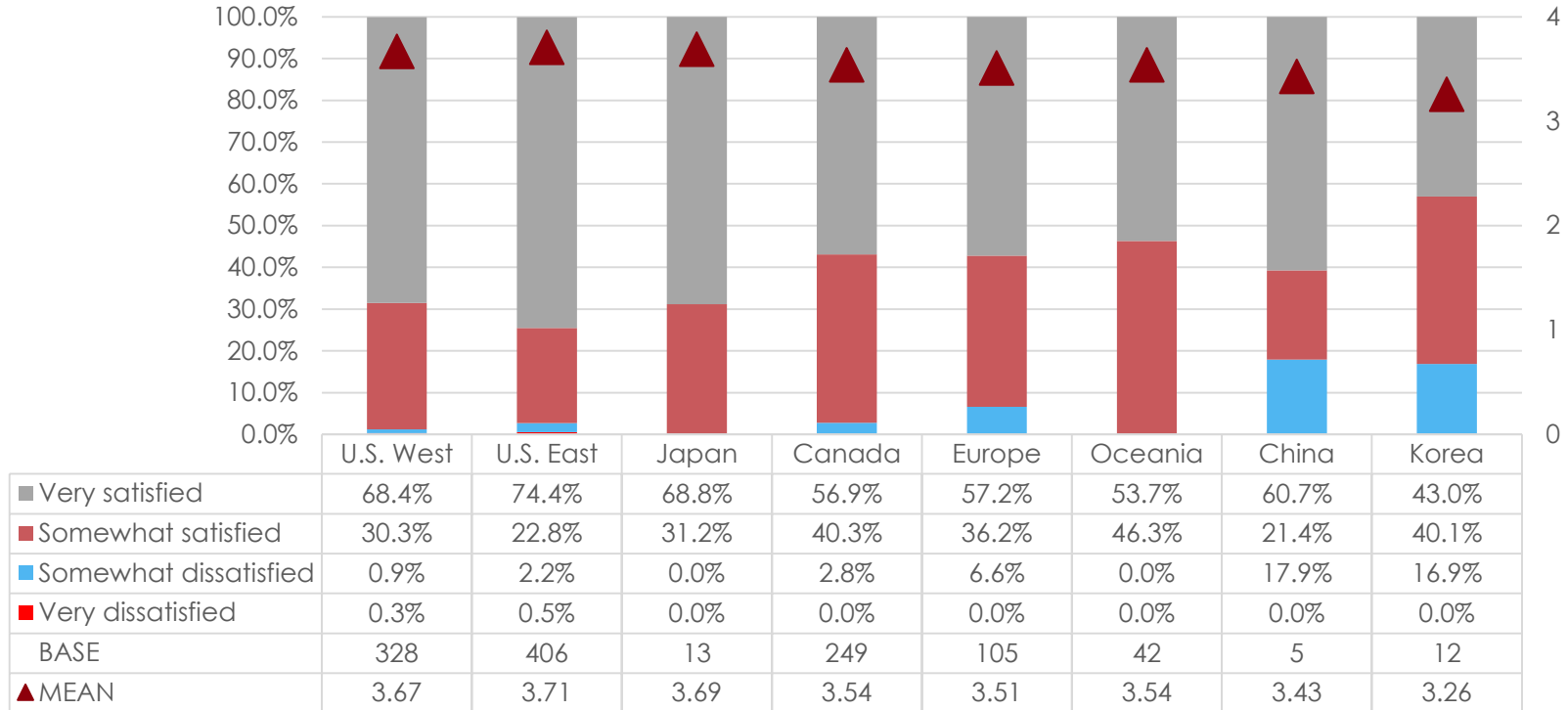
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Koke'e Museum	4.7%	3.5%	0.0%	4.9%	2.1%	3.0%	0.0%	0.0%
Na Aina Kai Gardens	1.8%	2.2%	7.5%	1.3%	2.1%	3.5%	0.0%	7.2%
Napali Coast	42.8%	59.5%	30.1%	58.3%	67.3%	60.1%	0.0%	21.5%
Allerton Garden	6.8%	6.7%	0.0%	5.5%	4.2%	6.0%	21.4%	0.0%
Limahuli Garden	5.7%	3.3%	0.0%	3.6%	5.0%	3.5%	21.4%	0.0%
Old Koloa Town	40.1%	28.8%	16.2%	40.5%	28.4%	32.8%	21.4%	30.0%
Opaeka'a Falls	30.9%	27.2%	0.0%	34.4%	36.8%	31.3%	39.3%	7.2%
Po'ipu Beach	66.3%	48.3%	45.1%	63.7%	65.5%	39.3%	39.3%	52.9%
Smith's Tropical Paradise Gardens	9.0%	10.2%	0.0%	8.4%	6.5%	1.5%	17.9%	0.0%
Spouting Horn	36.3%	38.0%	7.5%	45.3%	38.2%	30.4%	21.4%	8.5%
Wailua Falls	40.8%	39.7%	60.2%	54.9%	56.2%	38.9%	0.0%	38.6%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wailua River	29.2%	26.7%	15.0%	31.1%	32.7%	18.4%	0.0%	30.0%
Waimea Canyon	51.2%	63.9%	60.2%	69.8%	76.4%	62.7%	57.3%	78.5%
Disc Golf	0.3%	0.2%	0.0%	0.0%	0.0%	1.5%	21.4%	0.0%
Mini Golf	3.2%	2.0%	0.0%	2.6%	1.4%	1.5%	21.4%	0.0%

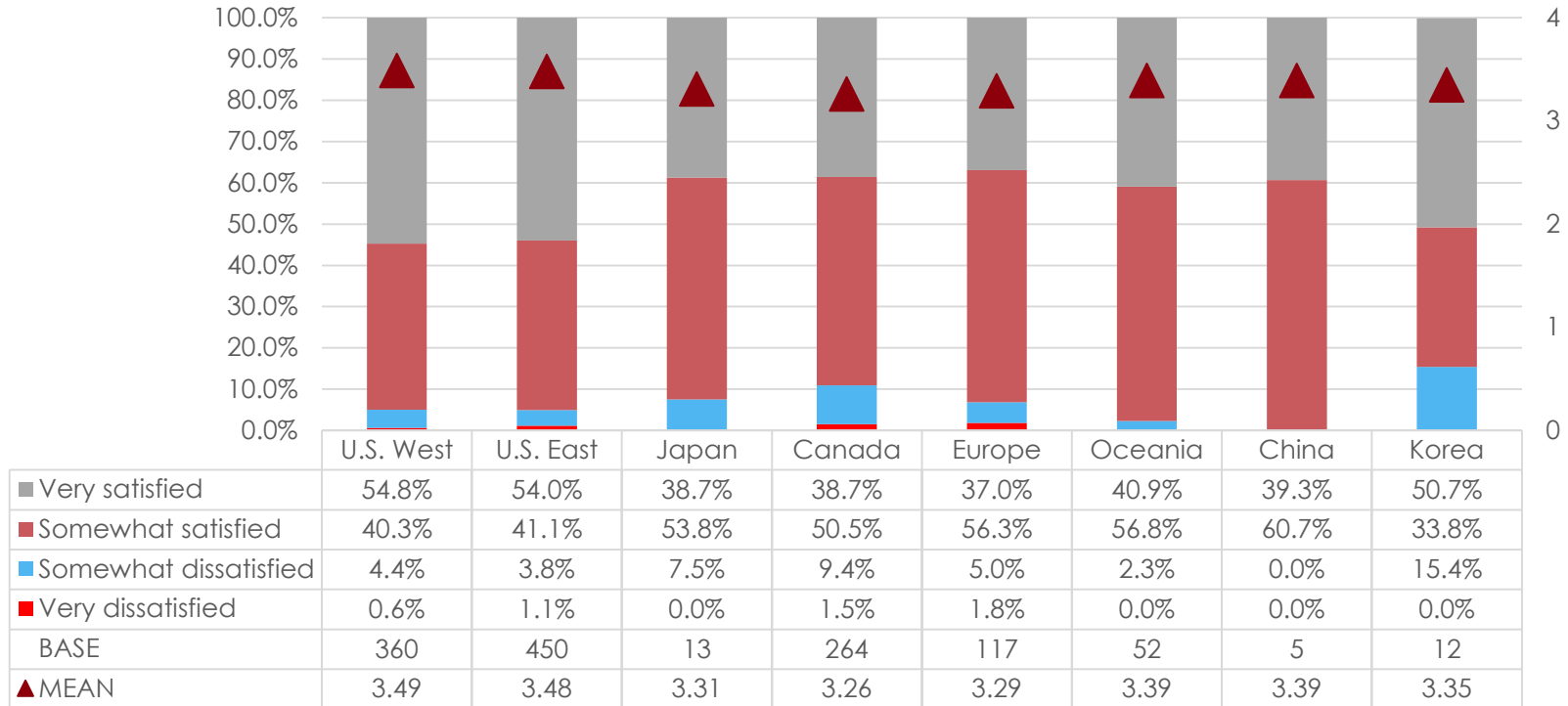
SATISFACTION – ENTERTAINMENT

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



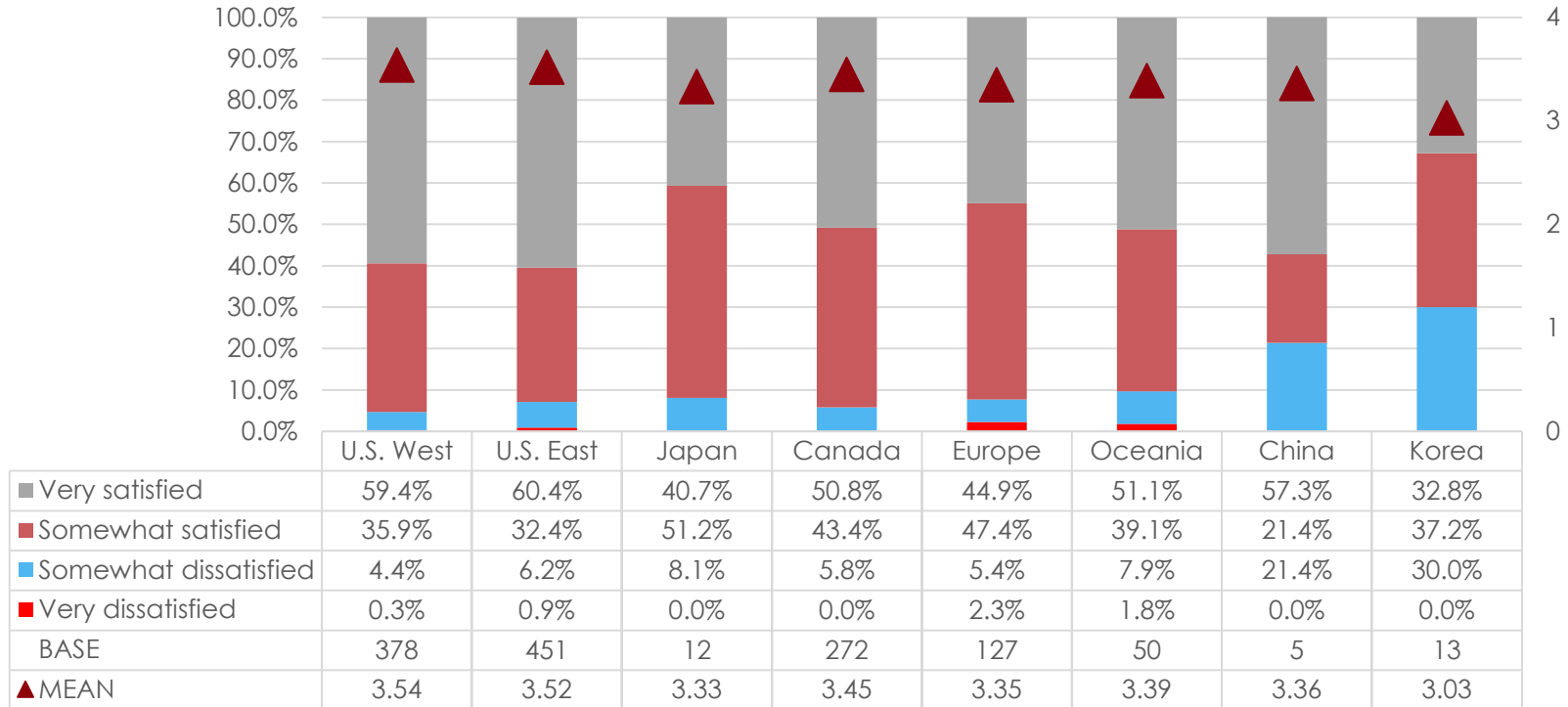
SATISFACTION – SHOPPING

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



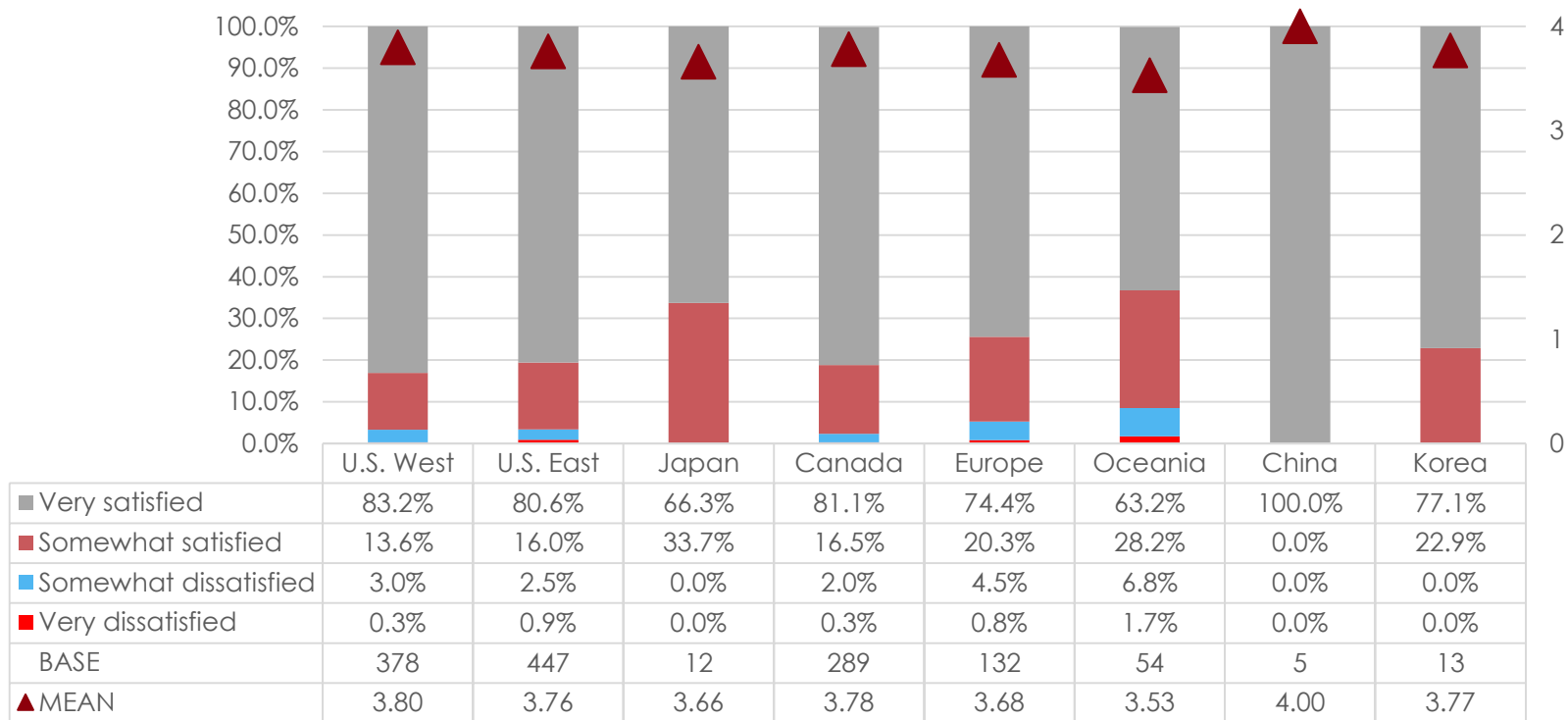
SATISFACTION – DINING

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



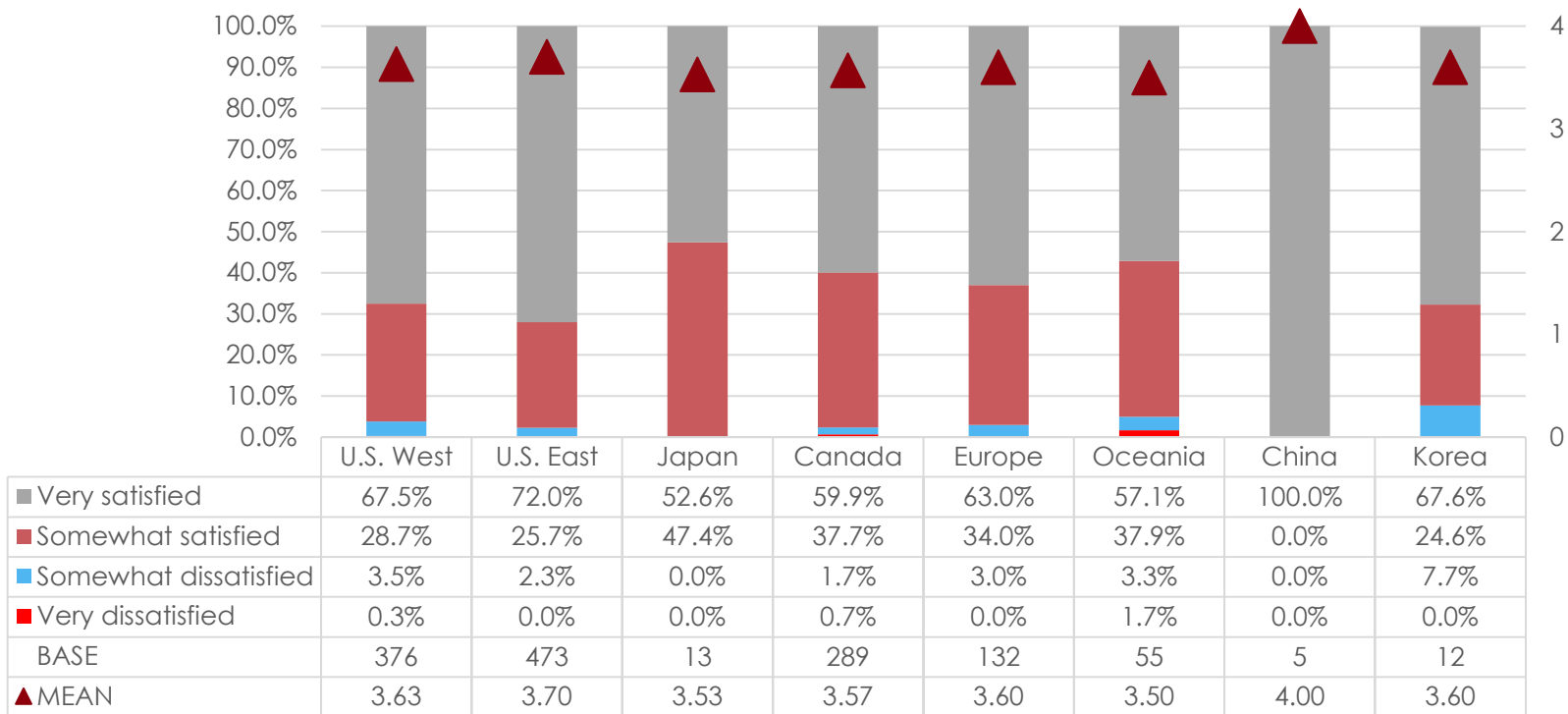
SATISFACTION – BEACHES

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



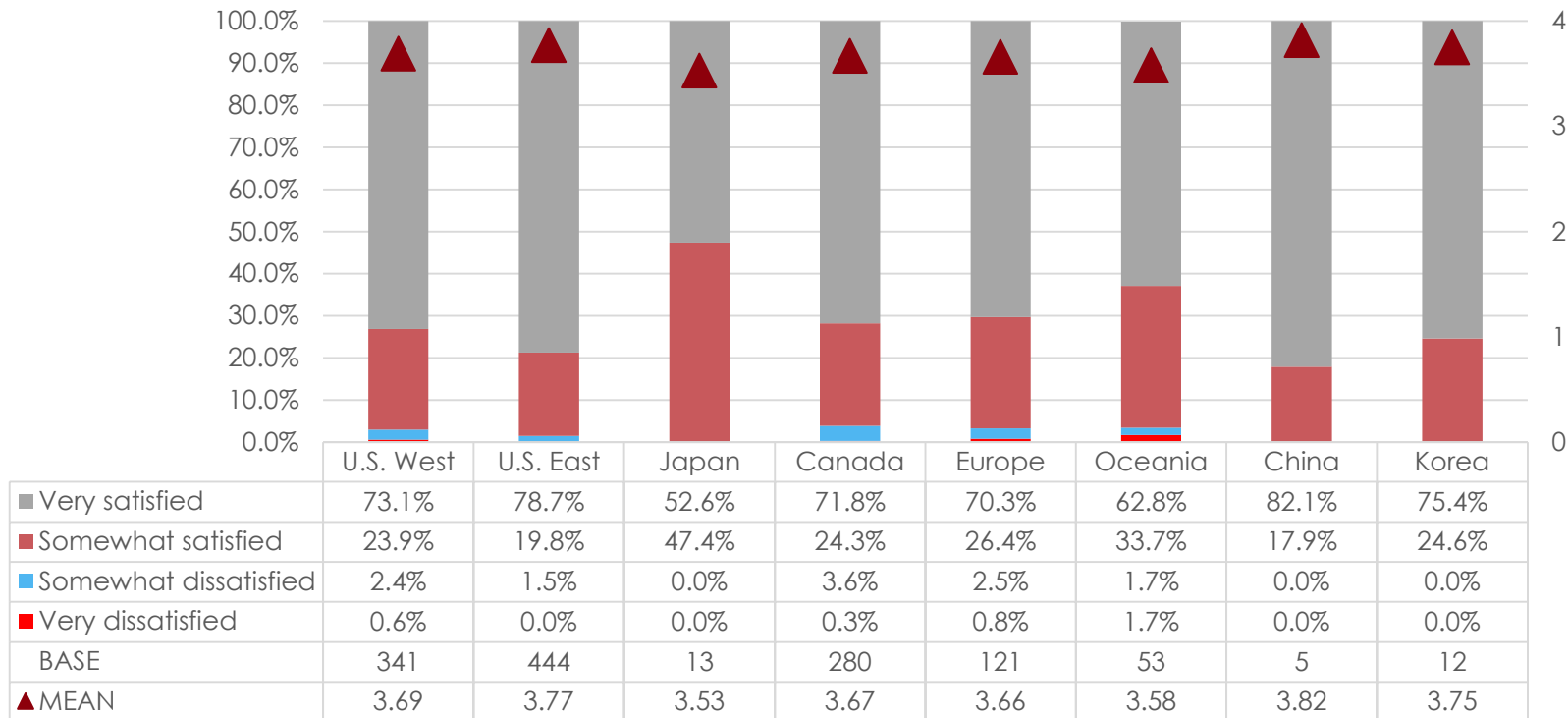
SATISFACTION – PUBLIC AREAS

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



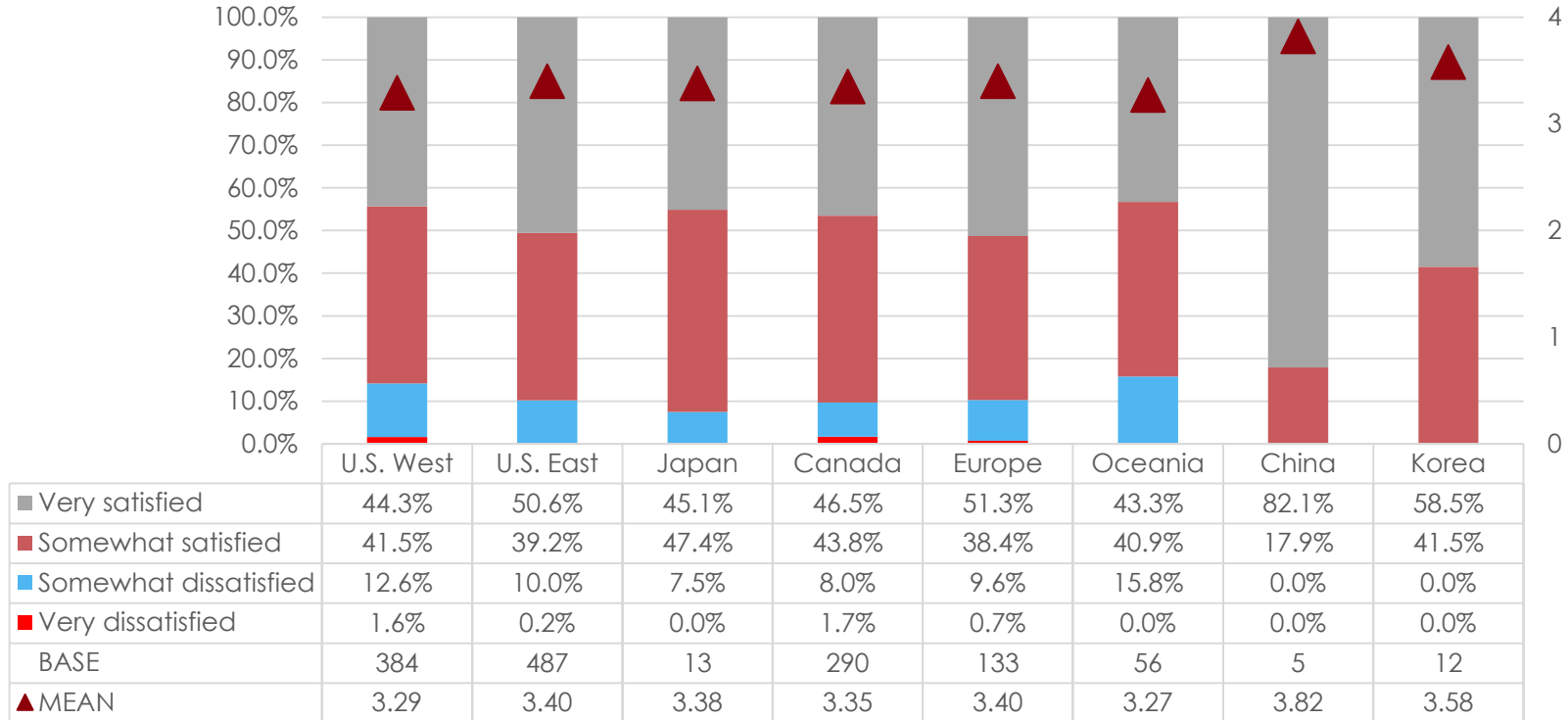
SATISFACTION – PARKS

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



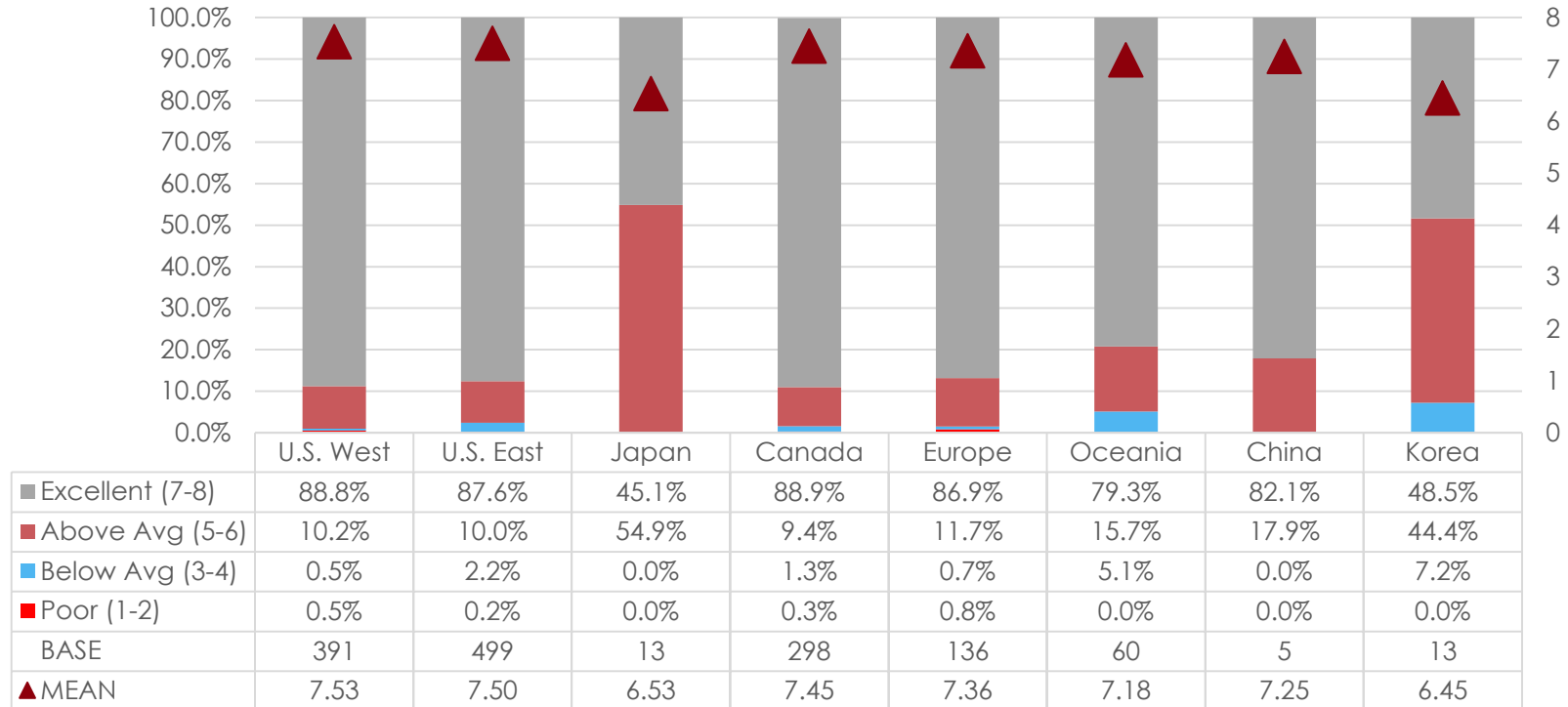
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

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



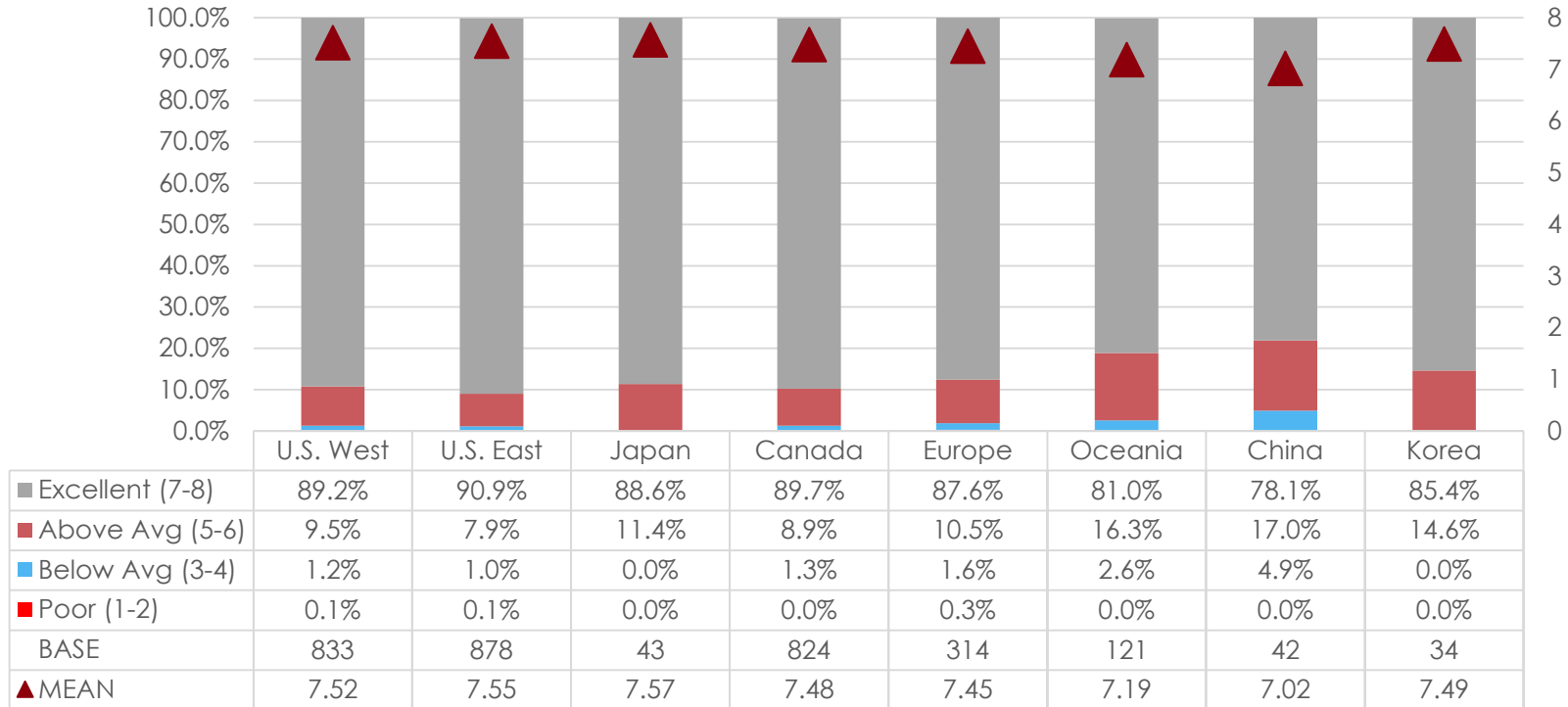
TOP INFLUENCERS – KAUA'I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	43.8%	25.7%	0.0%	21.9%	9.1%	17.4%	0.0%	0.0%
Friend recommendation	29.4%	27.9%	39.8%	35.6%	31.6%	20.9%	60.7%	24.2%
Cruise line stop	4.3%	20.1%	7.5%	8.0%	5.3%	27.7%	0.0%	0.0%
Article/ blog	4.0%	4.5%	0.0%	8.0%	16.8%	3.6%	0.0%	15.7%
Never been to	5.0%	2.5%	0.0%	4.8%	0.7%	3.2%	0.0%	0.0%
Attending conference/ Event	3.4%	1.4%	0.0%	4.4%	0.8%	0.0%	0.0%	0.0%
Travel agent	0.2%	4.6%	7.5%	3.0%	14.6%	1.6%	0.0%	22.9%
Visit friends/ family	2.4%	2.1%	0.0%	2.7%	0.0%	2.1%	0.0%	7.2%
Social media post	0.5%	2.5%	30.1%	3.1%	7.5%	8.9%	39.3%	30.0%

SECTION – MAUI

SATISFACTION – MAUI

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



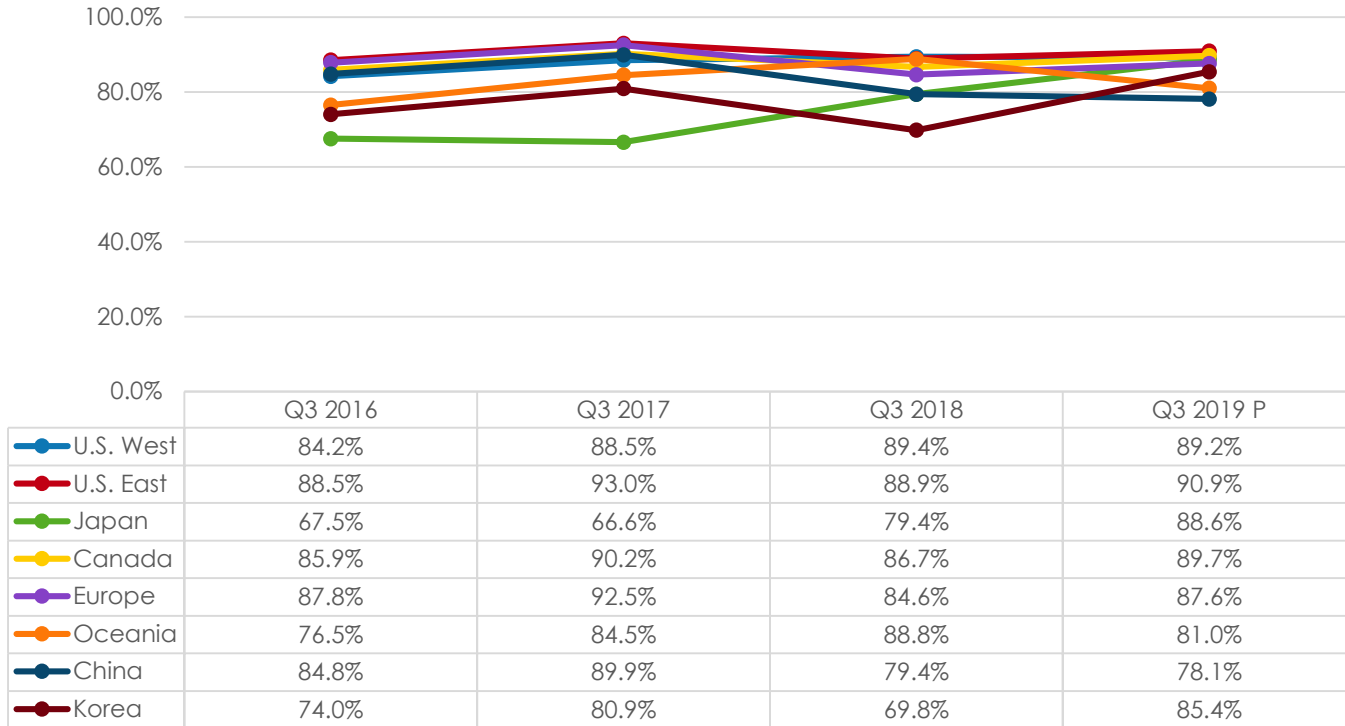
SATISFACTION – MAUI

COMPARISON OF MEANS

- **Only visited Maui:** Those from U.S. East who visited only Maui during this most recent trip tended to give the island higher satisfaction scores than those who visited other islands during their stay from this visitor market.
- **Age:** Younger travelers from U.S. West give Maui higher satisfaction scores than older travelers from this visitor market.
- **Gender:** Female travelers from U.S. West were also more satisfied with their stay on Maui than were males.
- **Travel party size:** Those from the U.S. West in smaller travel parties of one to two persons were more satisfied with their stay on Maui than those in larger travel parties. Conversely, visitors from Japan in larger groups (3+) tended to give higher satisfaction scores than those traveling in smaller travel parties.

SATISFACTION – MAUI

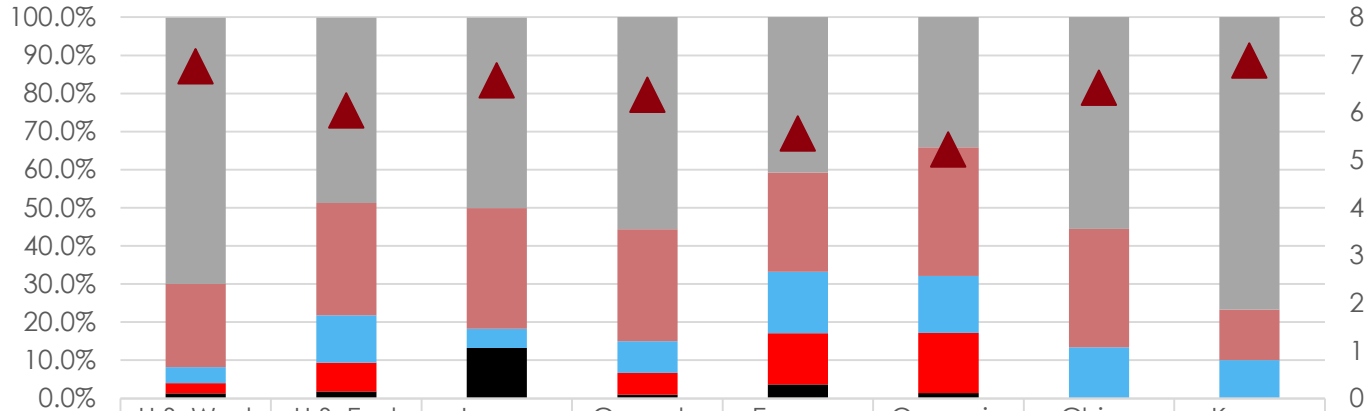
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

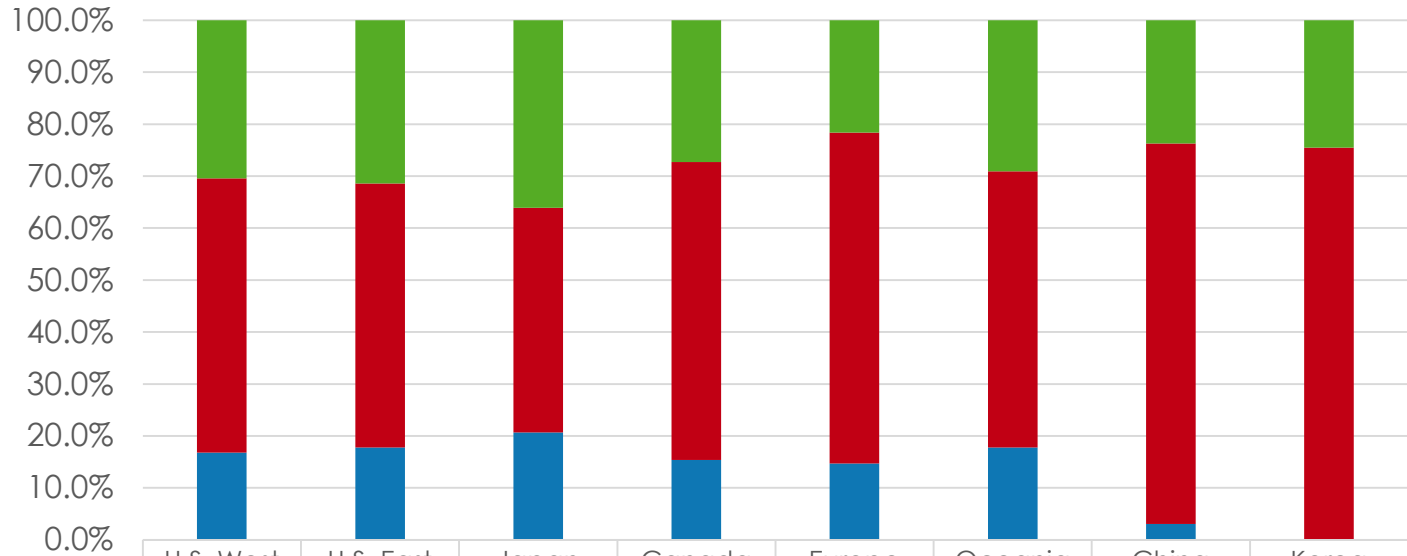
LIKELIHOOD OF RETURN VISIT – MAUI

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



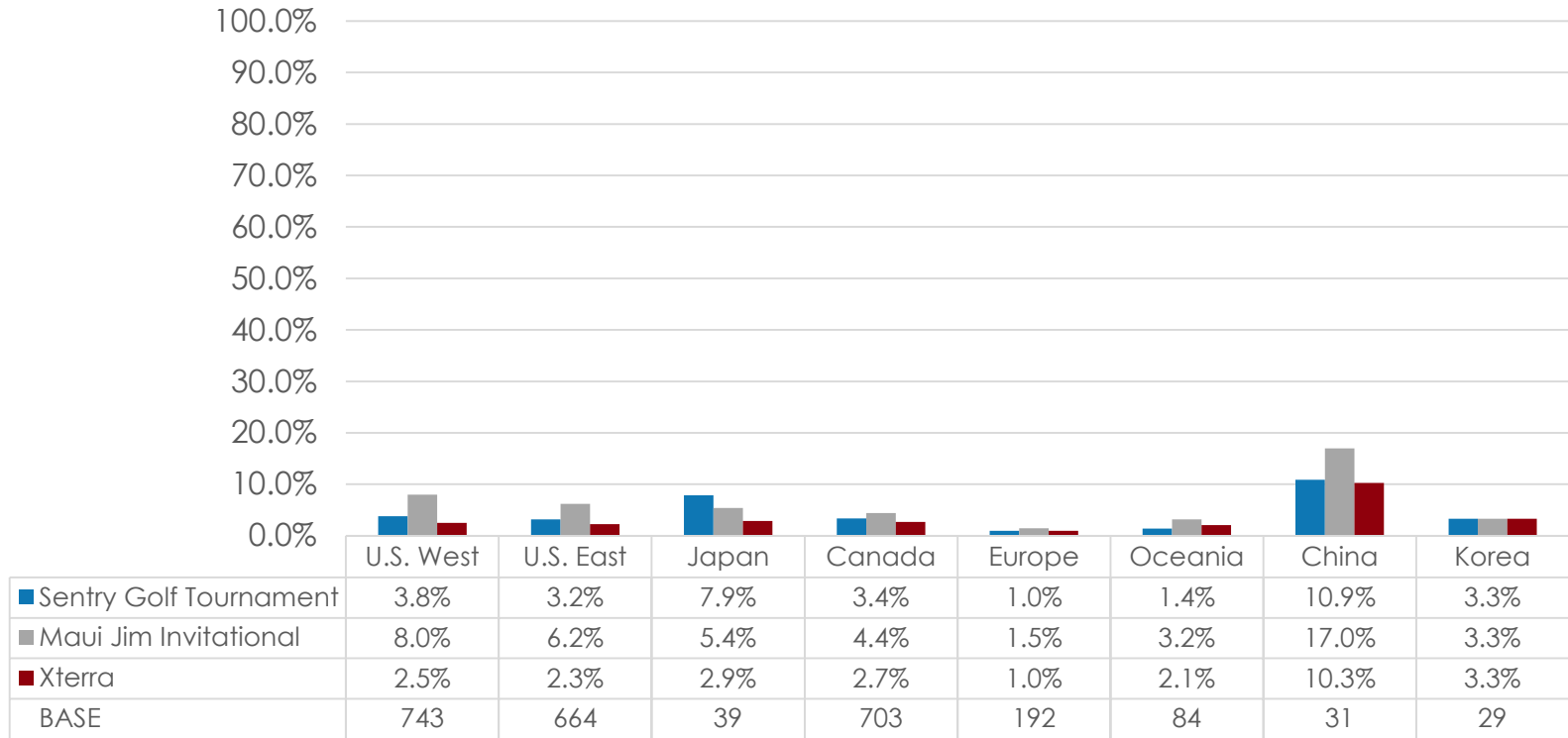
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	69.9%	48.6%	50.0%	55.6%	40.8%	34.1%	55.5%	76.8%
Somewhat likely (5-6)	21.8%	29.5%	31.6%	29.4%	26.0%	33.8%	31.1%	13.3%
Somewhat unlikely (3-4)	4.2%	12.4%	5.1%	8.3%	16.1%	14.9%	13.4%	10.0%
Very unlikely (1-2)	2.7%	7.6%	0.0%	5.7%	13.4%	15.8%	0.0%	0.0%
Not sure	1.3%	1.8%	13.2%	1.0%	3.7%	1.4%	0.0%	0.0%
BASE	731	656	38	692	189	81	31	29
MEAN	6.97	6.04	6.67	6.37	5.56	5.22	6.52	7.09

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	30.4%	31.4%	36.1%	27.3%	21.6%	29.1%	23.7%	24.5%
No Prior Awareness	52.8%	50.8%	43.2%	57.3%	63.7%	53.1%	73.2%	75.5%
Unsure	16.8%	17.8%	20.7%	15.4%	14.7%	17.8%	3.1%	0.0%
BASE	743	664	39	703	192	84	31	29

AIDED ADVERTISING AWARENESS – MAUI EVENTS



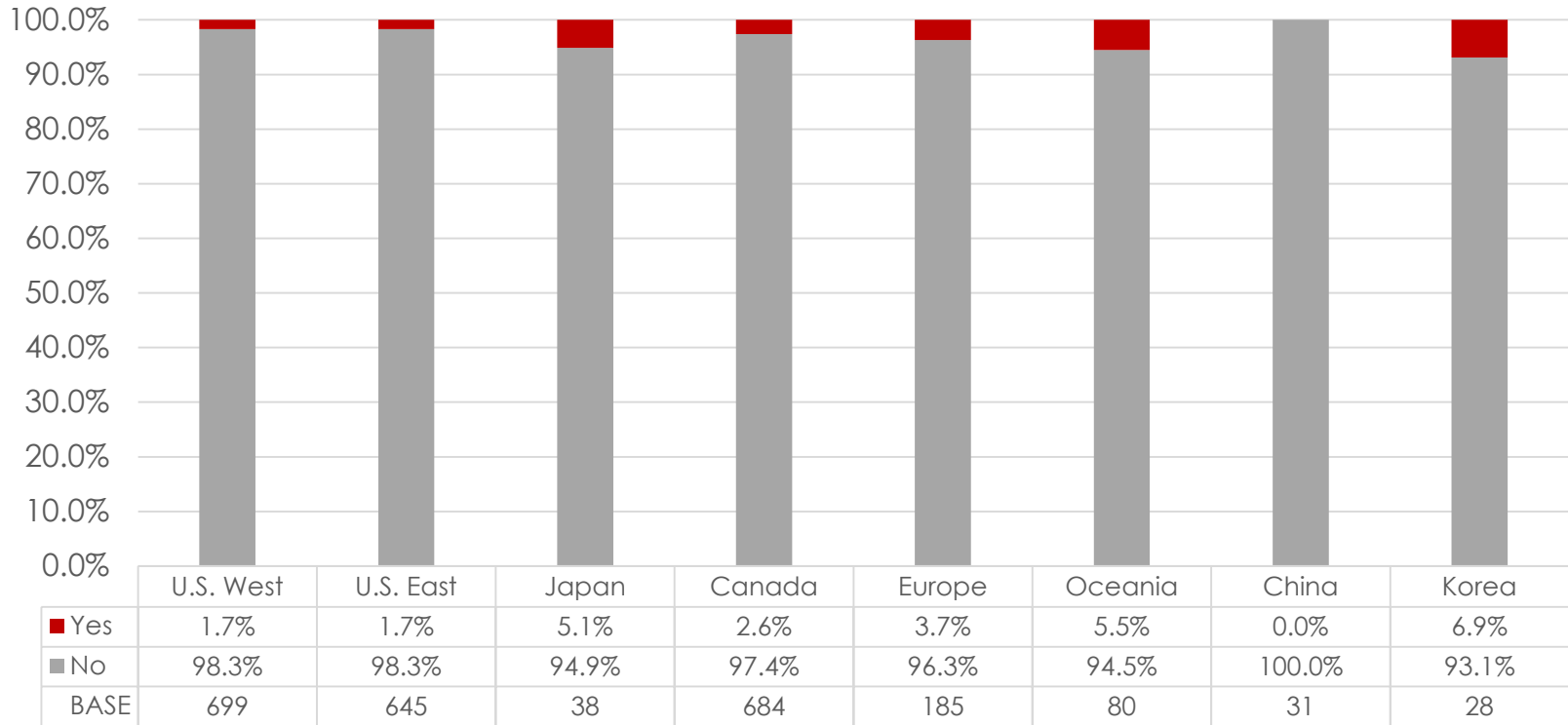
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
None of these	67.3%	65.3%	40.3%	52.4%	51.8%	63.0%	51.8%	45.0%
Hawaiian cultural events	8.0%	12.5%	10.7%	12.8%	9.0%	7.6%	16.4%	3.3%
Outdoor or sporting activities and events	20.3%	16.4%	28.2%	23.7%	19.2%	13.3%	9.8%	17.2%
Social media posts and videos	11.4%	15.0%	18.2%	18.5%	14.3%	14.0%	6.7%	27.8%
Hawaiian Music	5.2%	7.3%	2.9%	6.5%	6.2%	0.0%	7.3%	0.0%
TV programs/ Movies filmed in Hawaii	4.8%	9.3%	25.3%	12.3%	18.3%	8.1%	21.4%	17.2%

ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	2.4%	2.3%	0.0%	3.4%	1.6%	0.0%	10.9%	13.3%
Aquarium Maui /Maui Ocean Center	19.2%	20.3%	5.1%	26.9%	11.8%	11.7%	43.8%	3.9%
Baldwin Missionary Home Museum	5.4%	4.2%	0.0%	3.9%	5.2%	5.5%	0.0%	0.0%
Hale Pa'i Printing House	0.4%	0.3%	0.0%	0.3%	0.5%	0.0%	0.0%	0.0%
Haleakala National Park	33.8%	52.9%	37.1%	52.4%	49.2%	32.3%	42.6%	58.9%
Haleki'i-Pihana Heiau State Monument	1.8%	2.4%	0.0%	2.6%	7.0%	0.0%	7.3%	7.3%
Hana Cultural Center	10.1%	16.4%	3.0%	15.0%	19.1%	7.7%	48.8%	7.9%
'Iao Valley State Monument	15.8%	14.8%	15.4%	22.0%	18.3%	9.9%	0.0%	10.6%
Kepaniwai Park & Heritage Gardens	3.6%	4.4%	0.0%	5.9%	6.4%	1.1%	20.1%	3.9%
Kula Botanical Garden	5.7%	7.5%	3.0%	8.5%	4.6%	3.7%	13.4%	3.3%
Maui Historical Society Bailey House Museum	3.1%	2.8%	0.0%	2.6%	1.5%	3.3%	9.8%	0.0%
Whaler's Village Museum	16.7%	14.2%	7.7%	12.2%	12.1%	15.1%	10.3%	0.0%
Wo Hing Temple Museum	2.9%	2.0%	0.0%	2.9%	1.0%	1.5%	6.1%	0.0%

VISITED MAUI FOR SPECIFIC EVENT



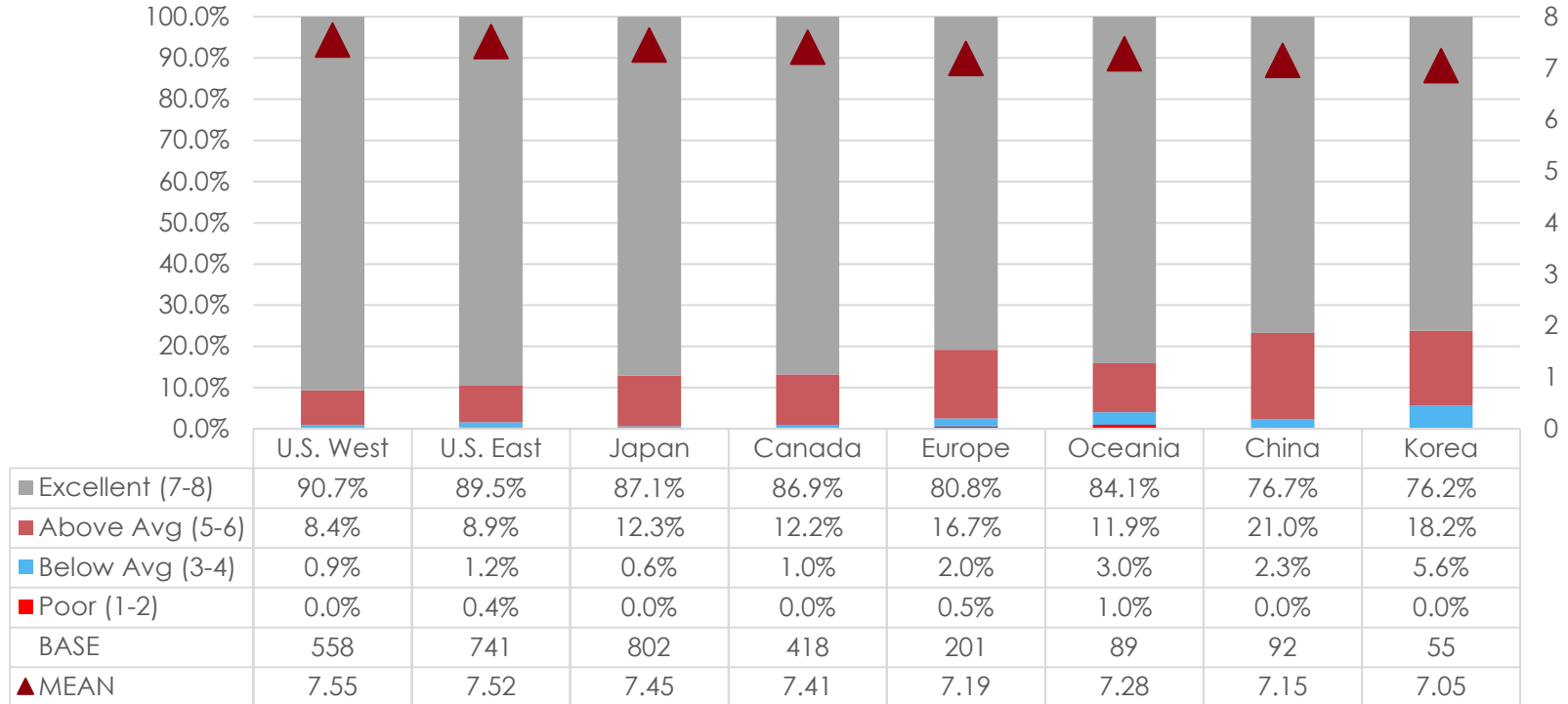
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wedding/ honeymoon, anniversary/ birthday/ funeral	33.9%	27.7%	0.0%	23.4%	42.5%	79.6%	0.0%	0.0%
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	25.4%	54.3%	0.0%	17.7%	15.1%	0.0%	0.0%	0.0%
Other sporting event	24.6%	9.6%	0.0%	6.0%	0.0%	20.4%	0.0%	0.0%
Hawaii Food & Wine Festival	8.5%	0.0%	50.0%	29.3%	0.0%	0.0%	0.0%	100.0%
Kapalua Food & Wine Festival	7.6%	0.0%	0.0%	6.0%	13.7%	0.0%	0.0%	0.0%
Other	0.0%	8.5%	0.0%	5.7%	13.7%	0.0%	0.0%	0.0%
Maui Marathon	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Maui Jim Invitational	0.0%	0.0%	0.0%	0.0%	15.1%	0.0%	0.0%	0.0%
Maui Film Festival	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%

SECTION – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

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



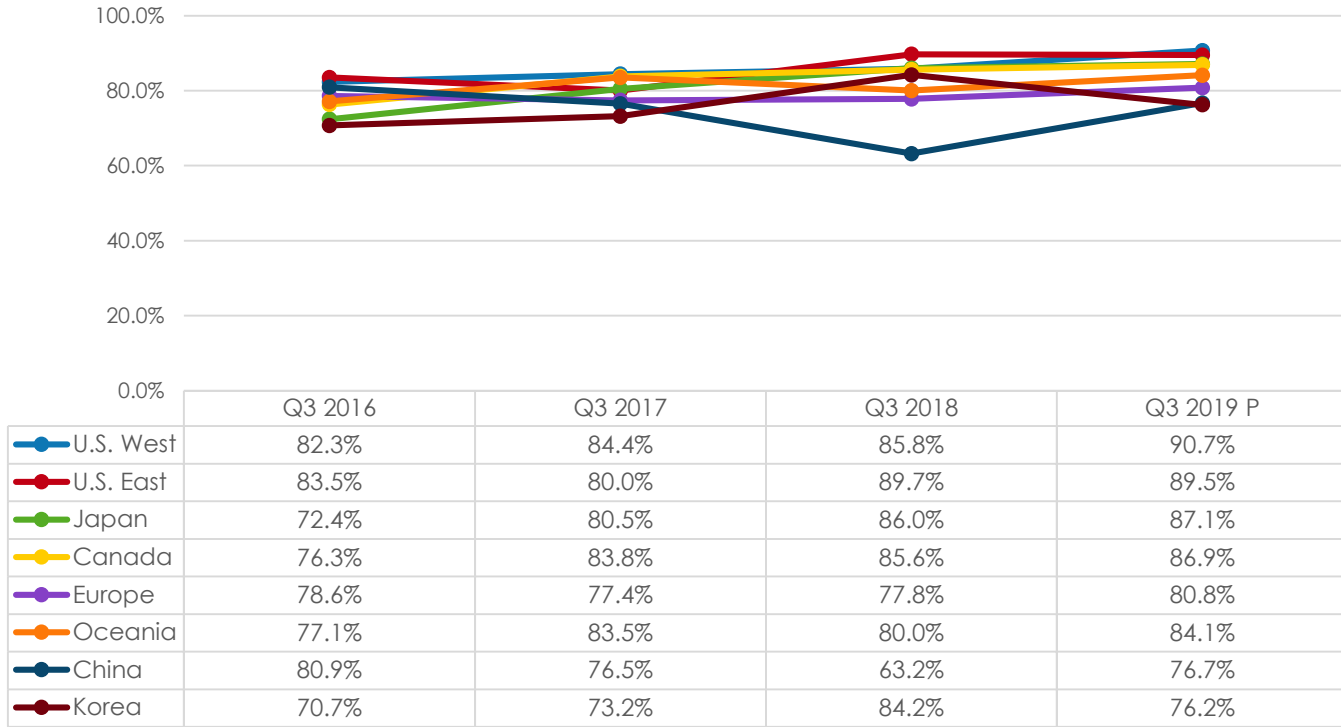
SATISFACTION – ISLAND OF HAWAI'I

COMPARISON OF MEANS

- **First-time vs Repeat:** Repeat visitors to Hawai'i from Japan tended to give their stay on Hawai'i Island higher satisfaction scores than first-time visitors to Hawai'i.
- **Age:** Among visitors from U.S. West, seniors were the least satisfied with their stay on Hawai'i Island.
- **Gender:** Female travelers from U.S. West were more satisfied with their stay on Hawai'i Island than were males.
- **College graduate:** Those without a college degree from U.S. West give higher satisfaction scores for their stay on Hawai'i Island than those with a college degree.

SATISFACTION – ISLAND OF HAWAI‘I

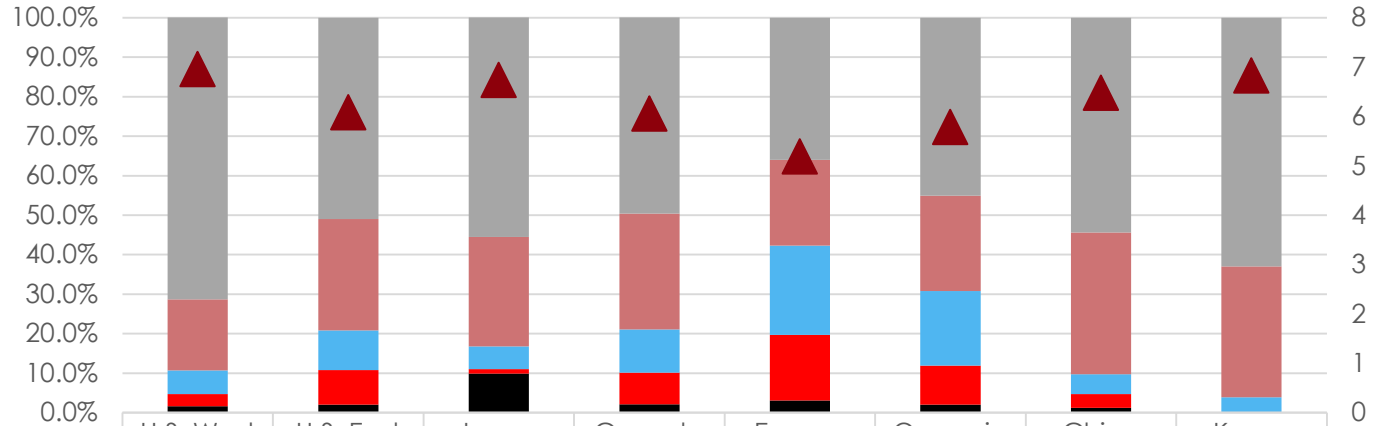
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

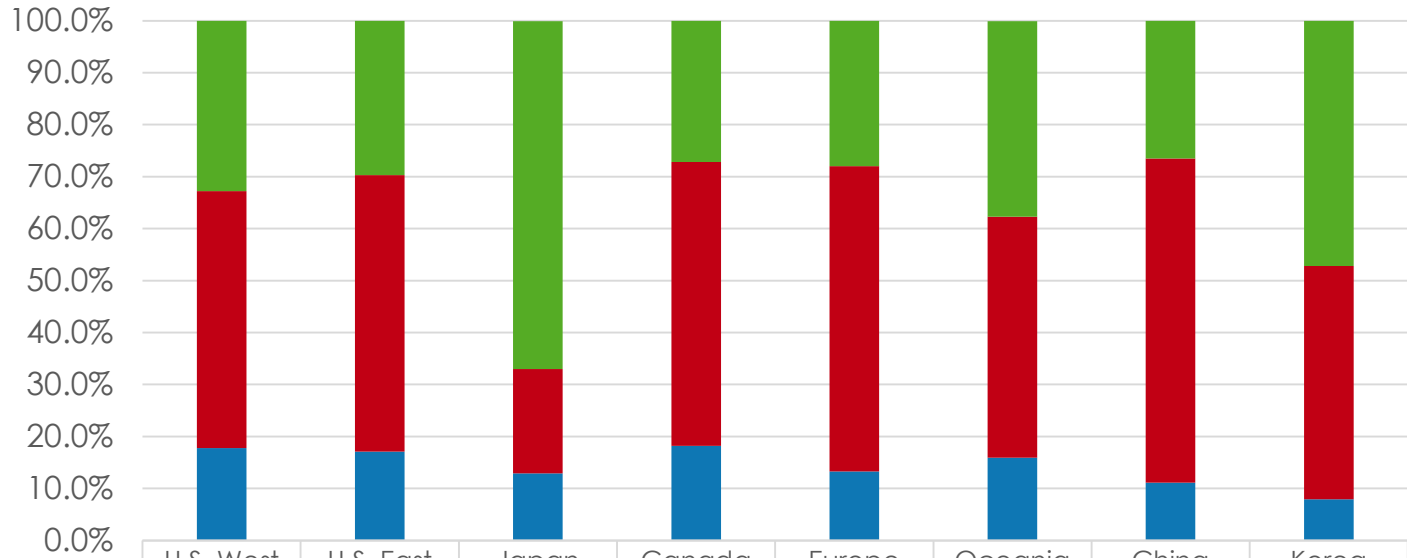
LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	71.4%	51.0%	55.6%	49.7%	36.0%	45.1%	54.4%	63.0%
■ Somewhat likely (5-6)	18.0%	28.2%	27.7%	29.3%	21.7%	24.1%	35.9%	33.1%
■ Somewhat unlikely (3-4)	6.0%	10.0%	5.8%	11.0%	22.6%	18.9%	5.0%	3.9%
■ Very unlikely (1-2)	3.1%	8.8%	1.1%	8.0%	16.6%	9.9%	3.5%	0.0%
■ Not sure	1.6%	2.0%	9.9%	2.1%	3.1%	2.0%	1.2%	0.0%
BASE	484	497	769	334	133	57	83	49
▲ MEAN	6.96	6.09	6.74	6.06	5.19	5.79	6.48	6.83

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	32.8%	29.7%	66.9%	27.2%	28.0%	37.6%	26.5%	47.2%
No Prior Awareness	49.4%	53.2%	20.1%	54.6%	58.7%	46.4%	62.4%	44.9%
Unsure	17.8%	17.1%	12.9%	18.2%	13.3%	15.9%	11.1%	7.9%
BASE	494	509	769	340	135	59	83	49

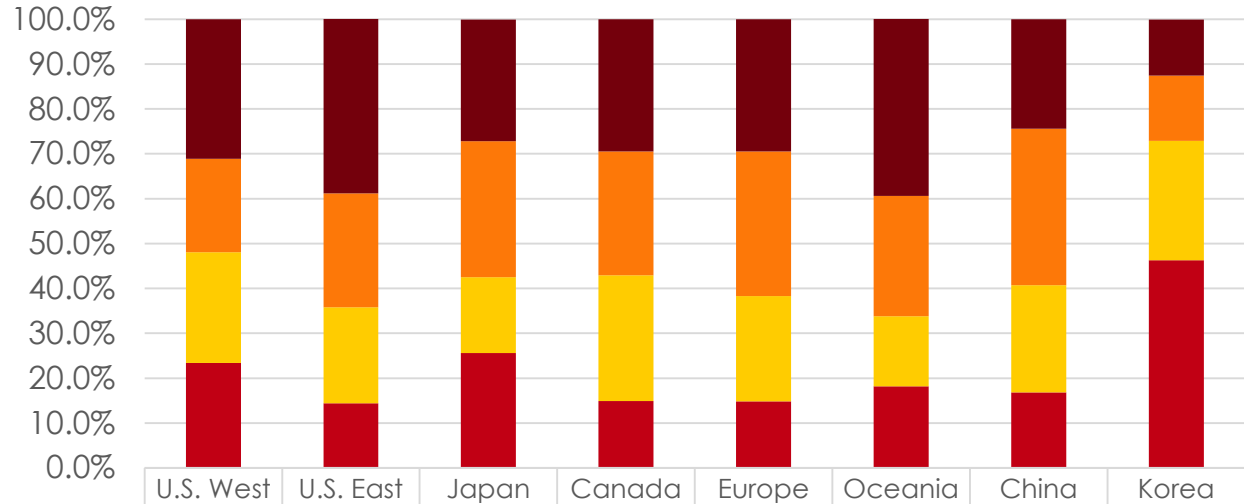
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
‘Akaka Falls	32.5%	35.2%	26.9%	43.6%	39.7%	21.0%	42.1%	16.5%
Botanical Gardens	23.4%	21.0%	3.7%	25.5%	31.4%	21.1%	20.8%	6.4%
H.N. Greenwell Store	3.0%	4.5%	1.2%	6.0%	0.8%	3.1%	2.7%	2.0%
Hawaii Volcanoes National Park	49.1%	64.1%	59.5%	66.4%	83.1%	69.5%	78.0%	32.7%
Hilo Farmers Market	26.2%	24.9%	17.8%	31.1%	18.9%	13.9%	13.6%	14.5%
Hulihe‘e Palace	6.7%	5.7%	7.9%	4.3%	4.5%	9.9%	2.4%	4.0%
‘Imiloa Astronomy Ctr	0.8%	2.3%	3.1%	3.6%	0.8%	1.6%	12.6%	4.0%
Kaloko-Honokohau National Historical Park	10.5%	11.9%	3.5%	16.6%	12.4%	3.6%	14.5%	0.0%
Kona Coffee Living History Farm	15.6%	19.7%	29.9%	16.5%	23.5%	21.6%	17.4%	39.5%
Lili‘uokalani Park and Garden	7.4%	9.5%	3.2%	12.9%	10.8%	8.8%	1.4%	10.1%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

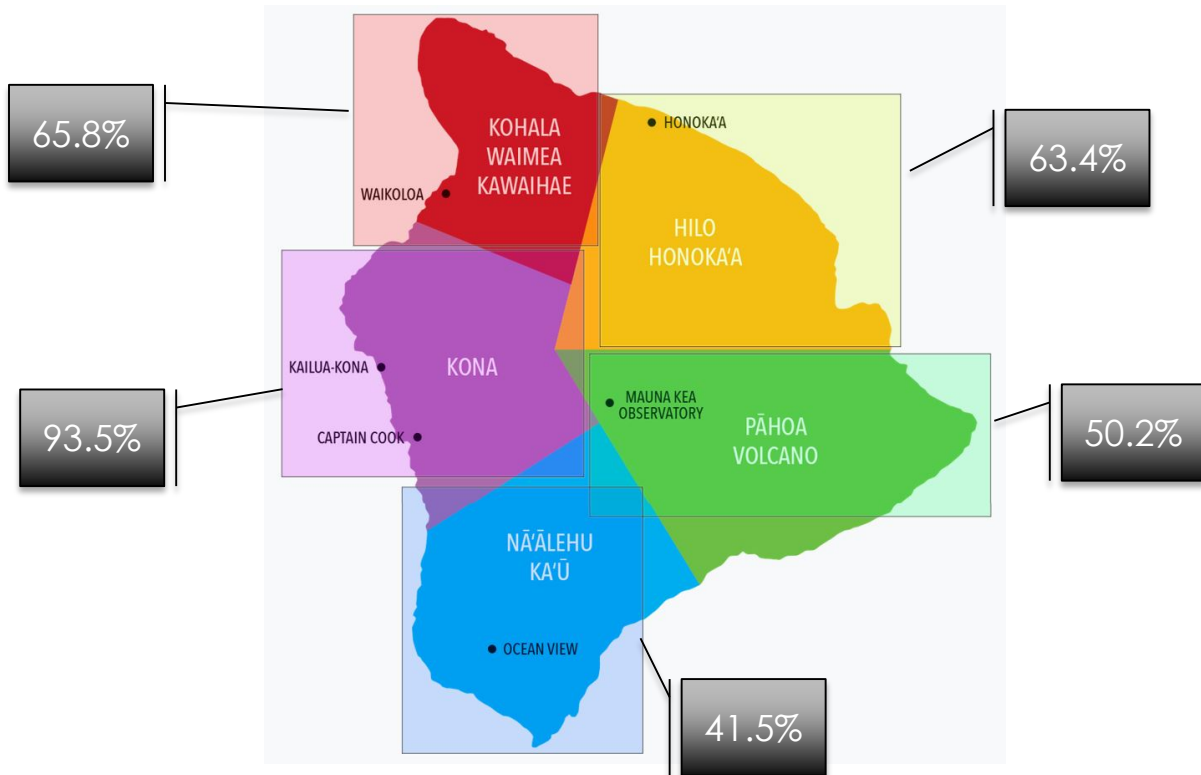
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Lyman House Memorial Museum	3.1%	1.4%	0.4%	0.6%	0.8%	1.6%	2.4%	0.0%
Maunakea	13.4%	19.7%	46.6%	20.1%	13.9%	10.3%	38.0%	23.0%
Orchid Farm	2.1%	3.9%	0.5%	3.6%	4.6%	1.6%	19.8%	8.1%
Pacific Tsunami Museum	3.3%	1.8%	1.7%	3.6%	2.3%	5.2%	2.4%	2.0%
Pana'ewa Rainforest Zoo & Garden	4.5%	4.8%	0.7%	6.9%	2.3%	3.6%	2.7%	2.0%
Pu'uhonua o Honaunau National Historical Park	24.8%	24.8%	6.9%	32.1%	27.4%	4.7%	3.6%	6.4%
Pu'ukohola Heia National Historical Site	9.8%	12.2%	3.4%	16.8%	12.1%	6.7%	2.4%	2.0%
Punalu'u Black Sand Beach	32.7%	45.6%	23.9%	49.7%	47.6%	30.4%	49.9%	14.5%
Rainbow Falls	32.4%	41.2%	19.4%	34.9%	39.7%	42.1%	37.5%	10.1%
Volcano Art Center	10.6%	13.5%	13.7%	15.5%	13.6%	16.9%	13.3%	10.1%

TRAVEL ON ISLAND OF HAWAI'I

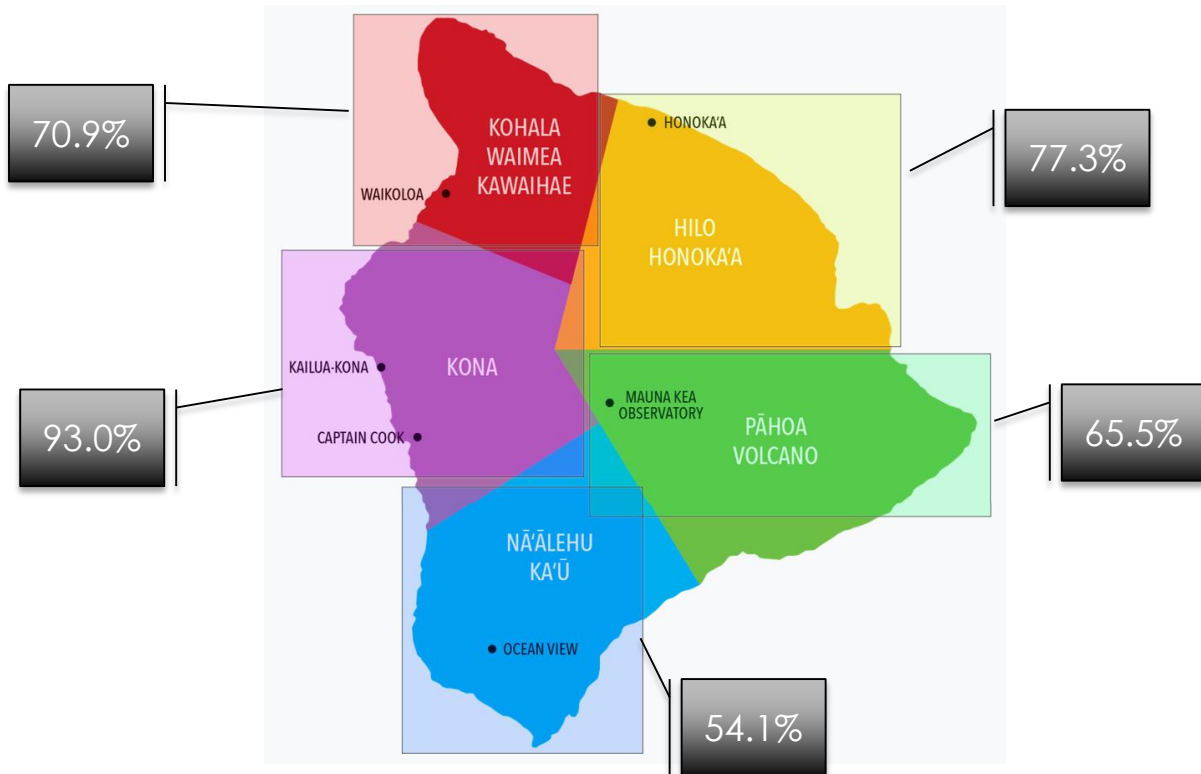


Traveled to other side of island	31.1%	38.9%	27.1%	29.5%	29.5%	39.5%	24.4%	12.5%
Traveled more than 1 hour	20.8%	25.4%	30.3%	27.6%	32.2%	26.8%	34.9%	14.5%
Traveled 1 hour or less one way to reach activity	24.7%	21.4%	16.9%	28.0%	23.5%	15.6%	23.9%	26.6%
Enjoy activities- short drive from accommodations	23.4%	14.4%	25.6%	14.9%	14.8%	18.2%	16.8%	46.3%
BASE	462	476	768	329	128	55	82	48

AREAS VISITED U.S. WEST

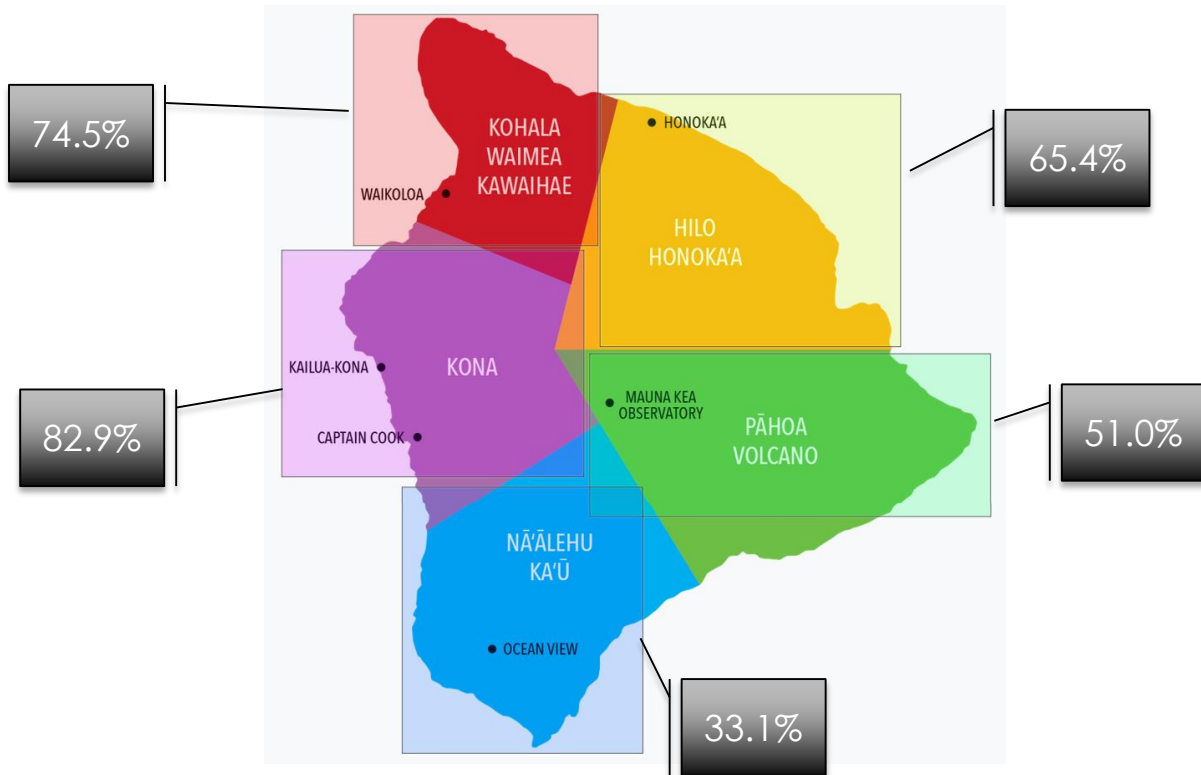


AREAS VISITED U.S. EAST

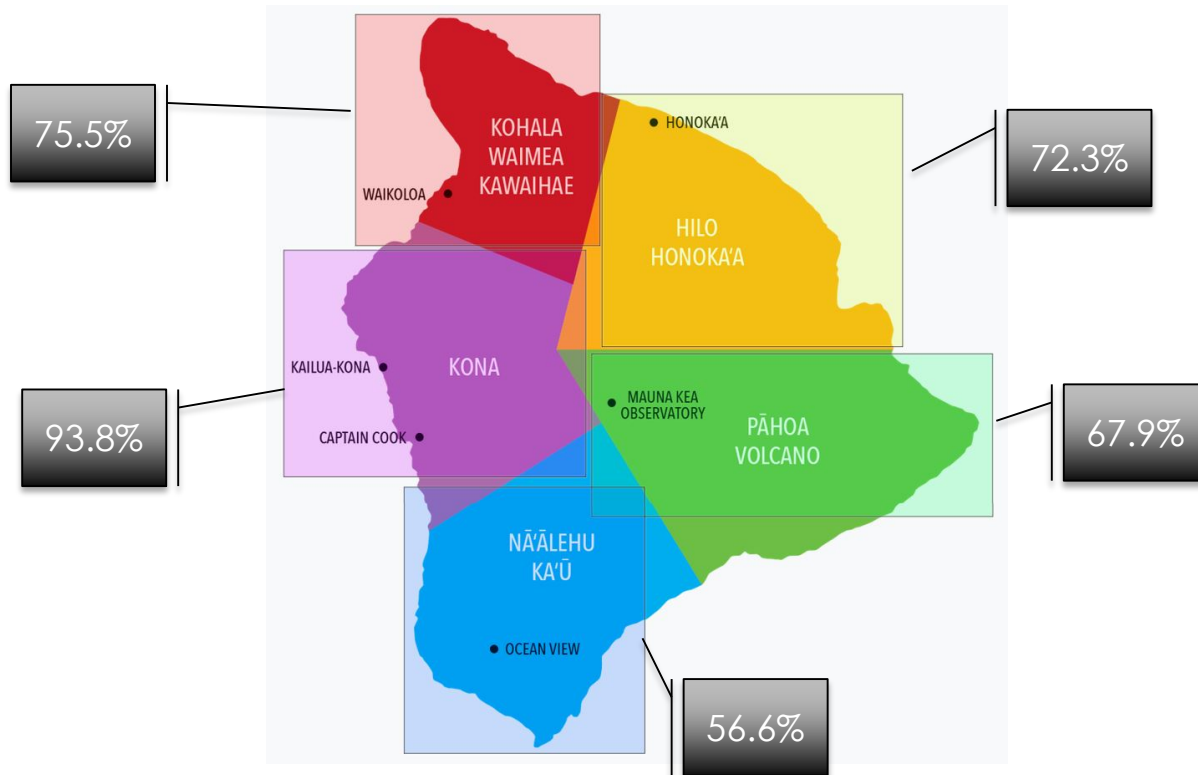


101 Q Which of the following areas did you visit during your stay on Hawai'i Island?

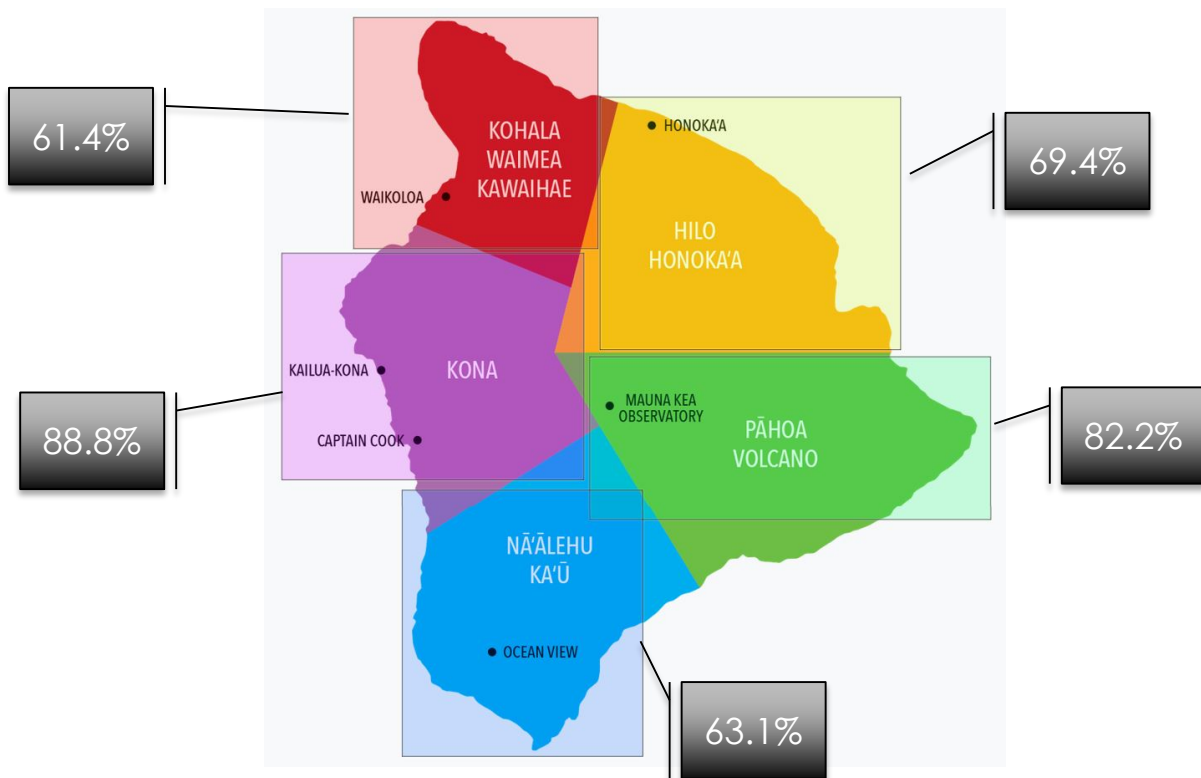
AREAS VISITED JAPAN



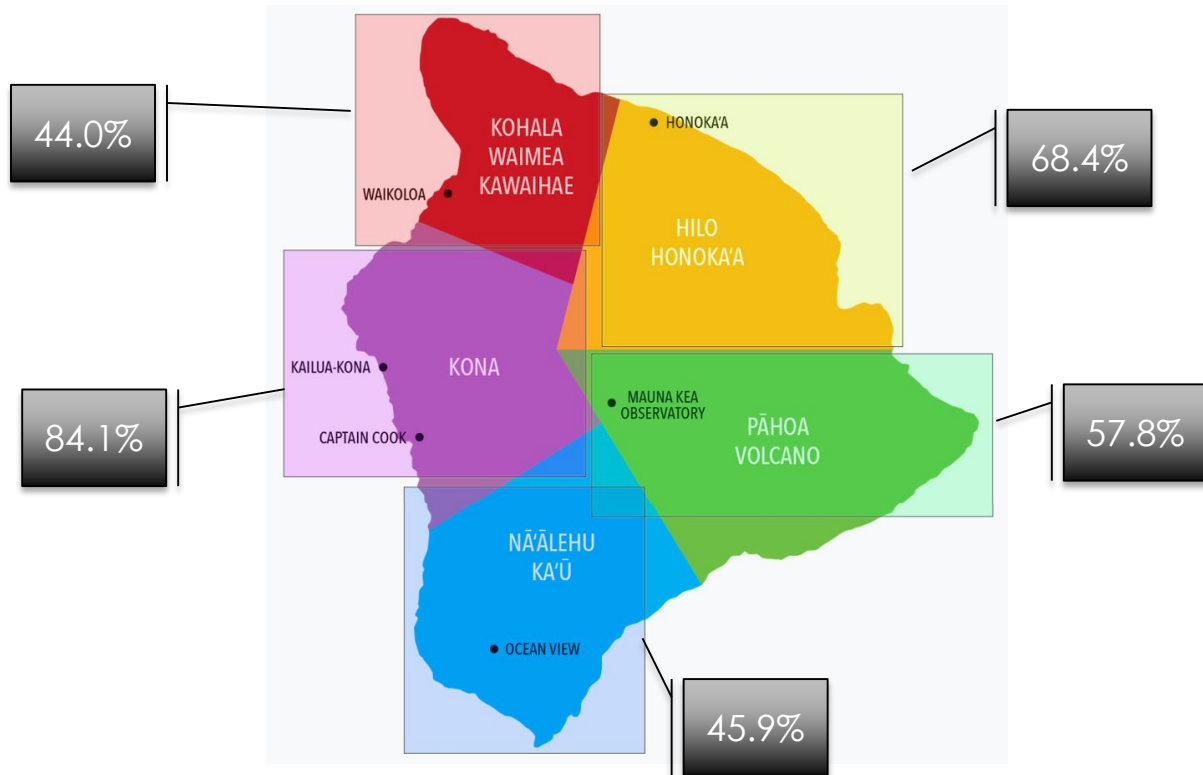
AREAS VISITED CANADA



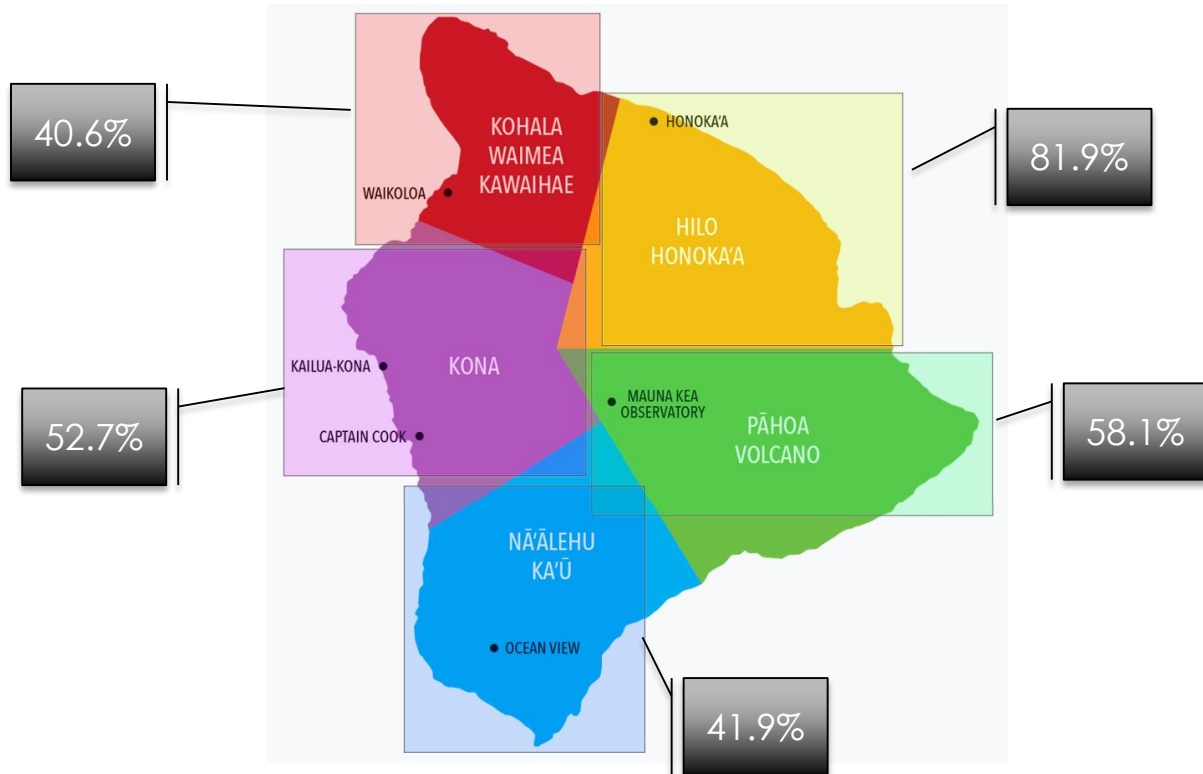
AREAS VISITED EUROPE



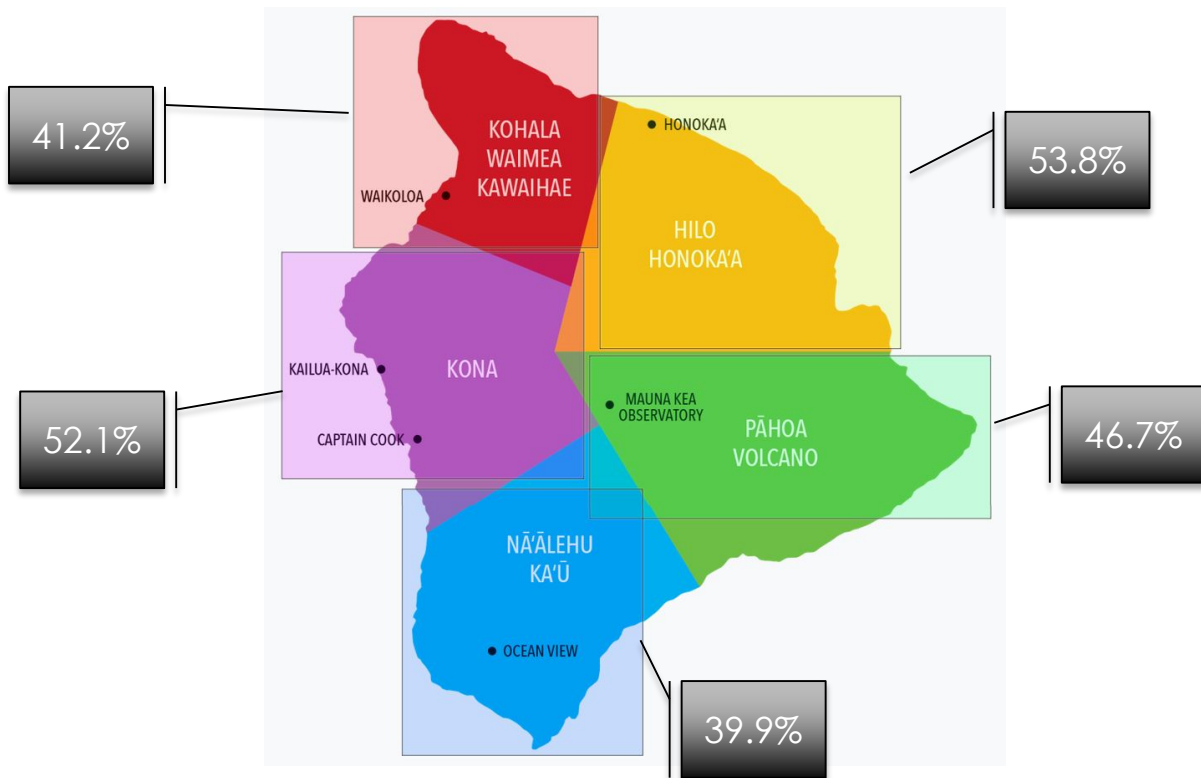
AREAS VISITED OCEANIA



AREAS VISITED CHINA

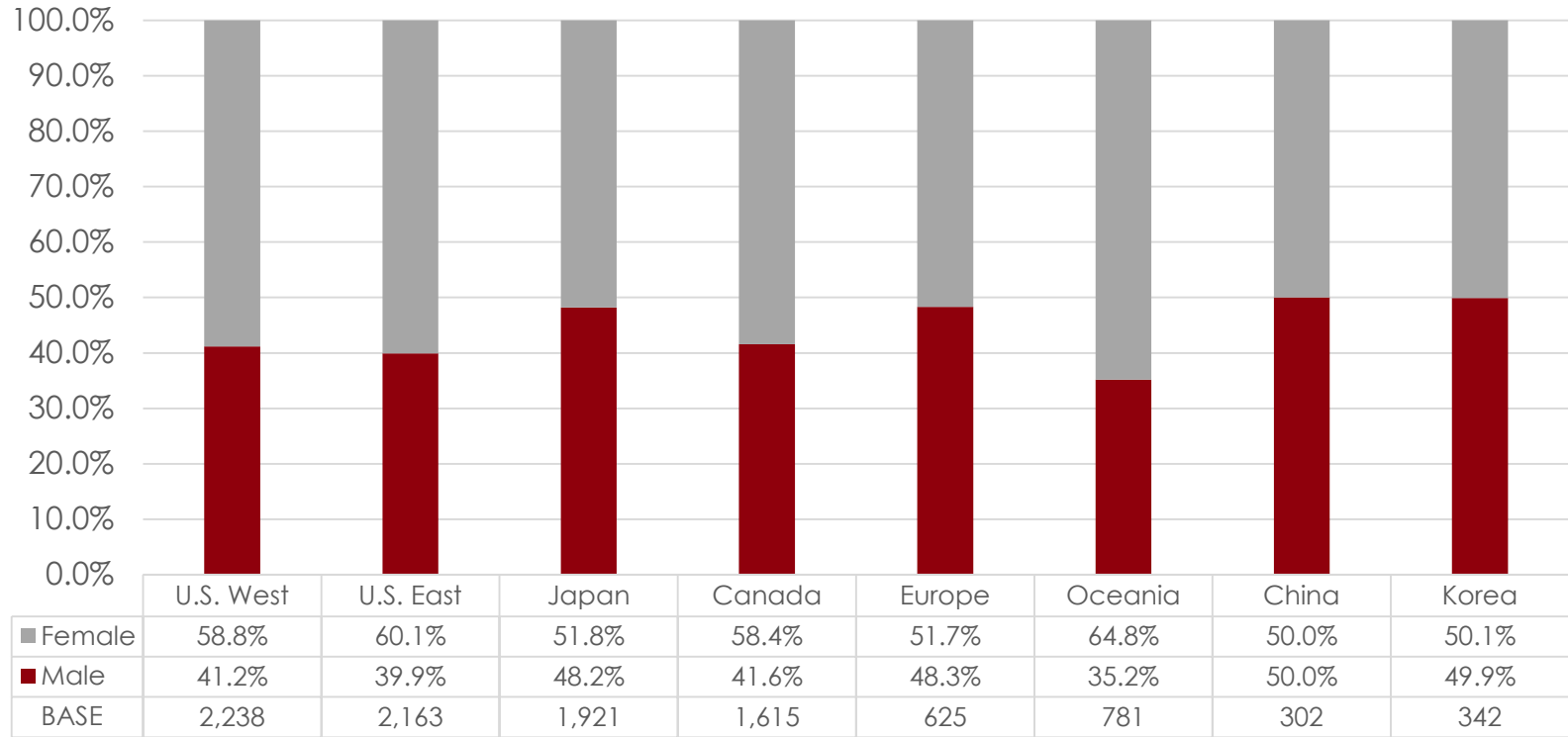


AREAS VISITED KOREA

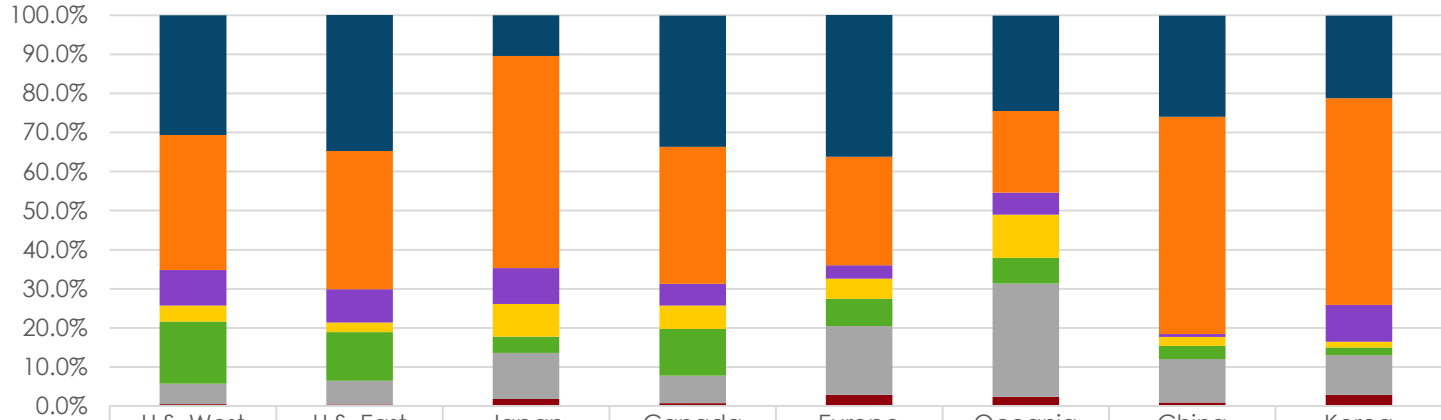


SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Post-Graduate	30.6%	34.8%	10.4%	33.6%	36.3%	24.4%	25.9%	21.1%
■ College Grad	34.6%	35.4%	54.3%	35.0%	27.8%	20.9%	55.6%	52.9%
■ Associate Degree	9.1%	8.5%	9.2%	5.6%	3.4%	5.6%	0.7%	9.4%
■ Vocational/ Tech	4.1%	2.5%	8.3%	6.0%	5.2%	11.1%	2.3%	1.5%
■ Some College	15.9%	12.4%	4.2%	11.9%	6.9%	6.5%	3.4%	2.0%
■ H.S. Grad	5.2%	6.1%	11.8%	7.1%	17.6%	29.0%	11.1%	10.1%
■ Some / No H.S.	0.5%	0.4%	1.8%	0.7%	2.9%	2.4%	0.9%	2.9%
BASE	2,233	2,160	1,921	1,612	625	778	302	342

VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	6.8%	5.5%	7.7%	17.8%	9.2%
\$40,000 to \$59,999	7.6%	7.9%	8.6%	14.6%	9.4%
\$60,000 to \$79,999	9.3%	10.1%	9.6%	14.7%	9.8%
\$80,000 to \$99,999	9.4%	11.6%	10.4%	13.0%	13.5%
\$100,000 to \$124,999	15.1%	12.9%	13.0%	11.4%	14.1%
\$125,000 to \$149,999	12.1%	11.5%	14.0%	8.1%	10.6%
\$150,000 to \$174,999	9.1%	9.4%	11.1%	6.0%	7.1%
\$175,000 to \$199,999	7.0%	6.1%	7.1%	3.1%	8.3%
\$200,000 to \$249,999	9.3%	7.6%	7.7%	3.8%	8.2%
\$250,000 +	14.3%	17.2%	10.8%	7.4%	9.8%

VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	13.5%
¥3.5 - ¥4.5 million	10.4%
¥4.5 - ¥5.5 million	8.5%
¥5.5 - ¥6.5 million	6.9%
¥6.5 - ¥7.5 million	6.3%
¥7.5 - ¥8.5 million	8.5%
¥8.5 - ¥10.0 million	11.3%
¥10.0 - ¥15.0 million	18.5%
¥15.0 - ¥20.0 million	8.5%
¥20.0 million +	7.7%

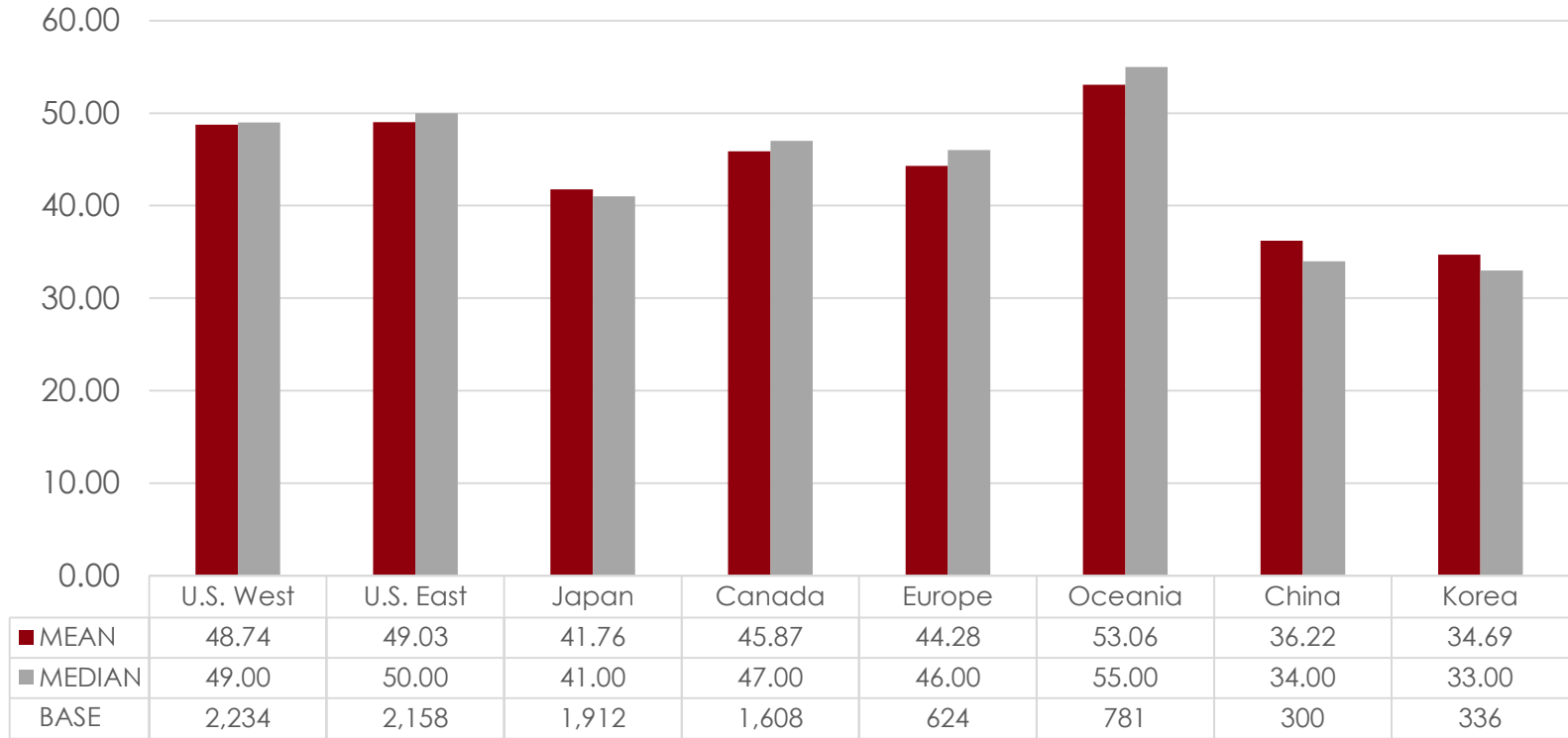
VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	17.0%
₩16,305,000-21,171,999	10.4%
₩27,174,000-38,041,999	11.0%
₩38,044,000-48,911,999	7.5%
₩48,912,000-59,781,999	7.6%
₩59,782,000-70,652,999	10.0%
₩70,653,000-81,520,999	6.4%
₩81,521,000-92,390,999	5.3%
₩92,391,000-103,259,999	4.9%
₩103,260,000+	19.9%

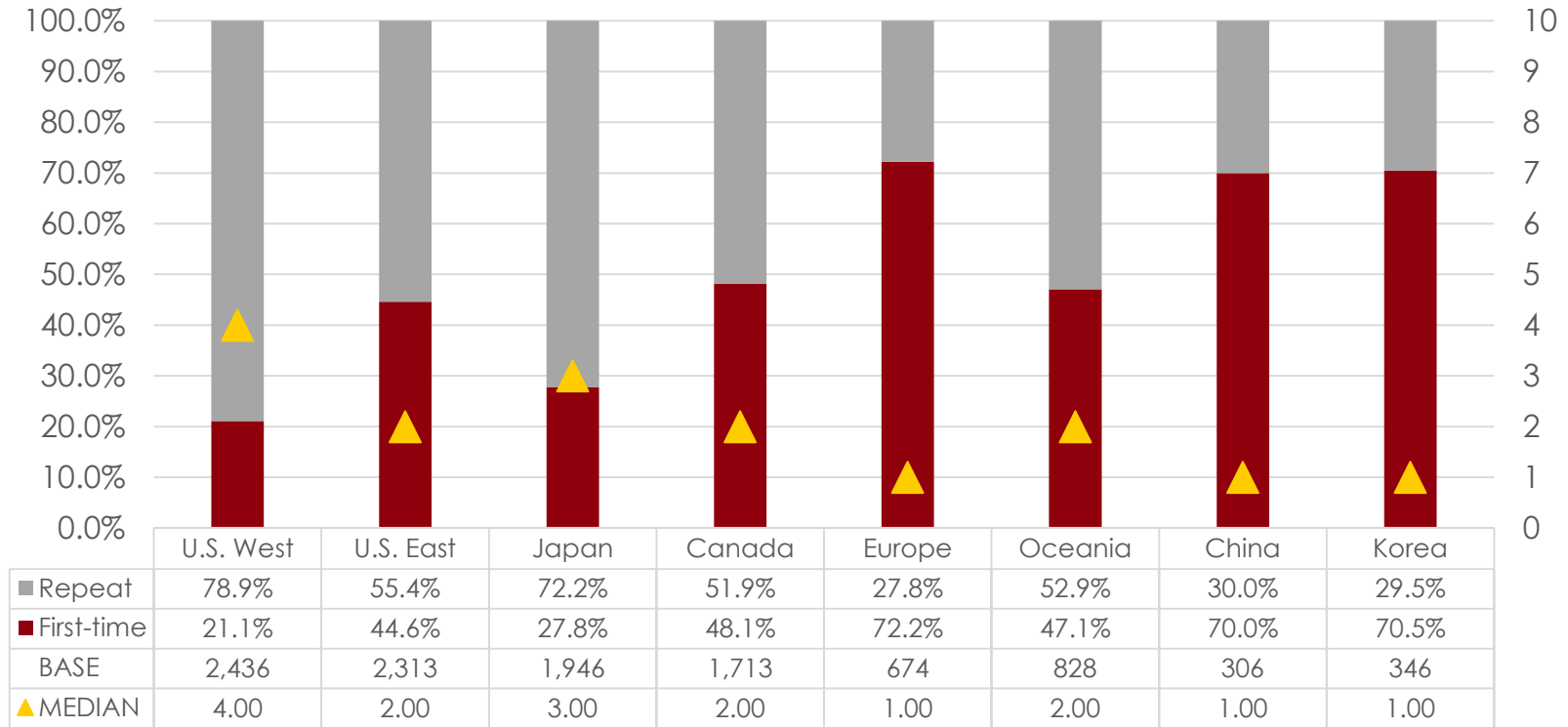
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	33.8%
¥250,800 - ¥376,099	22.3%
¥376,100 - ¥501,399	17.8%
¥501,400 - ¥626,799	9.3%
¥626,800 - ¥783,499	3.4%
¥783,500 - ¥940,199	6.6%
¥940,200 - ¥1,096,899	3.1%
¥1,096,900 - ¥1,253,599	0.7%
¥1,253,600 - ¥1,560,799	0.7%
¥1,560,800+	2.4%

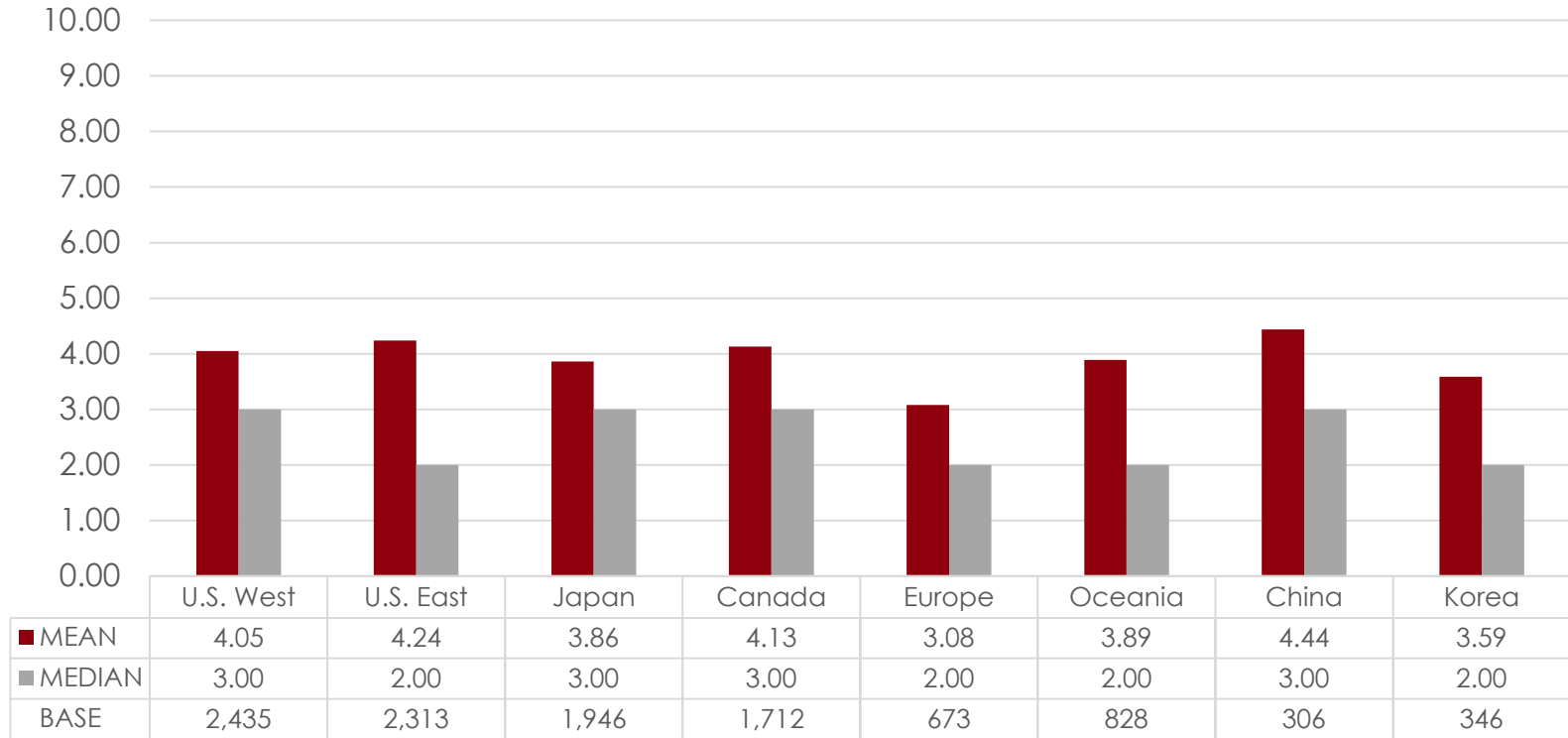
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAI‘I



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Spouse	60.2%	62.9%	59.5%	59.4%	54.1%	60.5%	43.2%	58.9%
Other adult family	31.8%	28.3%	27.1%	27.9%	21.2%	24.0%	16.1%	28.1%
Child <18	31.0%	26.3%	28.1%	30.7%	22.4%	20.3%	22.9%	17.5%
Friend/ Associate	14.2%	13.7%	18.4%	16.2%	15.5%	17.9%	28.8%	13.0%
Alone	7.2%	9.4%	4.7%	6.0%	8.0%	7.8%	10.5%	2.9%
Girlfriend/ boyfriend	8.1%	6.3%	4.0%	9.1%	12.4%	6.2%	10.7%	3.1%
Same-sex partner	1.6%	1.1%	0.1%	0.6%	1.7%	0.9%	1.7%	0.0%

SECTION – ISLAND SURVEY METHODOLOGY

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

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

MMA	Completed	Margin of Error \pm
US West	1,027	3.06
US East	1,362	2.66
Japan	1,268	2.75
Canada	693	3.72
Europe	479	4.48
Oceania	793	3.48
China	279	5.87
Korea	311	5.56
All MMAs	6,212	1.24

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

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

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

MMA	Completed	Margin of Error \pm
US West	424	4.76
US East	560	4.14
Japan	13	27.18
Canada	324	5.44
Europe	154	7.90
Oceania	68	11.88
China	6	40.01
Korea	13	27.18
All MMAs	1,562	2.48

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

MMA	Completed	Margin of Error \pm
US West	833	3.40
US East	878	3.31
Japan	43	14.94
Canada	824	3.41
Europe	314	5.53
Oceania	121	8.91
China	42	15.21
Korea	34	16.81
All MMAs	3,089	1.82

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

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

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

MMA	Completed	Margin of Error \pm
US West	558	4.15
US East	741	3.60
Japan	802	3.46
Canada	418	4.79
Europe	201	6.91
Oceania	89	10.39
China	92	10.22
Korea	55	13.21
All MMAs	2,956	1.80

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