

# Visitor Satisfaction Study

Q4 2020

Prepared for:  
Hawai'i Tourism Authority

[ANTHOLOGY®]

[AnthologyGroup.com](https://AnthologyGroup.com)

# TABLE OF CONTENTS

- Section 1 – Visitor Satisfaction
- Section 2 – Activities
- Section 3 – Travelers with Disabilities
- Section 4 – Island of O‘ahu
- Section 5 – Island of Kaua‘i
- Section 6 – Island of Maui
- Section 7 – Island of Hawai‘i
- Section 8 – Visitor Profile
- Section 9 – Island Survey Methodology

# 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. Due to the effects of the COVID-19 pandemic, which are explained further on Page 4, only visitors from the U.S. West and U.S. East MMAs were interviewed in Q4 2020. These MMAs are defined as follows: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.).

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	8,619	1.06%	23.56%
<b>U.S. East</b>	4,239	1.51%	23.06%
<b>All MMAs</b>	12,858	0.86%	23.29%

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

## METHODOLOGY – OVERALL (cont.)

Monthly samples of visitors who stayed for at least two days are drawn from completed the Domestic In-Flight database. Given the uncertainty around the number of visitors who would arrive in Hawaii during Q4 2020, all visitors who met the sampling criteria were sent an email invitation with a link to complete the survey online, resulting in higher than usual sample sizes for the sampled MMAs.

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

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

# METHODOLOGY – Effect of COVID-19

## **COVID-19 Travel Restrictions**

In December 2019 and January 2020, the initial cases of novel coronavirus (2019-nCoV)-infected pneumonia (NCIP) occurred in Wuhan, Hubei Province, China. Concerns around the virus and related travel restrictions resulted in suspended flights to and from Canada, China, Japan, Korea and Oceania. Flights to Hawai'i from Japan and Canada resumed in November and December 2020, respectively, but they were very limited and resulted in an insufficient number of visitors to sample for the VSAT study. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter.

## **State of Hawai'i Safe Travels Program**

On March 26, 2020, the State of Hawai'i started requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. Then on October 15, 2020, the State of Hawaii Safe Travels program began, which allowed all visitors and returning residents to avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawai'i. On December 4, the mandatory quarantine period for all those who did not

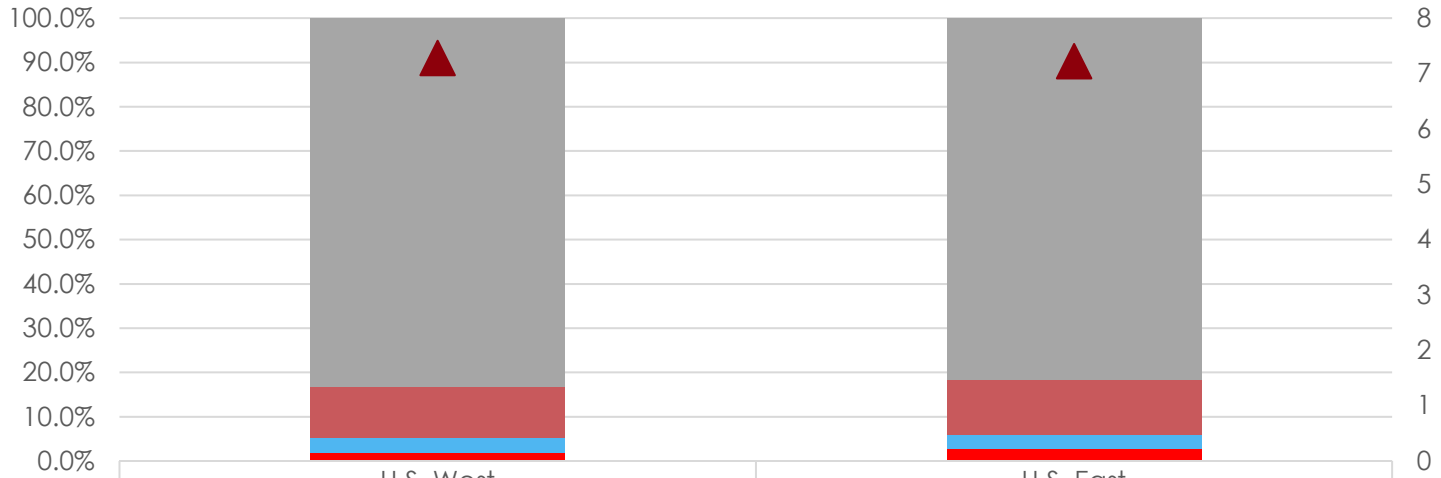
5 have a negative test result was reduced from 14 days to 10 days.

# Section 1

# VISITOR SATISFACTION

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



	U.S. West	U.S. East
■ Excellent (7-8)	83.3%	81.7%
■ Above Avg (5-6)	11.5%	12.3%
■ Below Avg (3-4)	3.4%	3.3%
■ Poor (1-2)	1.8%	2.7%
BASE	8,619	4,239
▲ MEAN	7.28	7.22

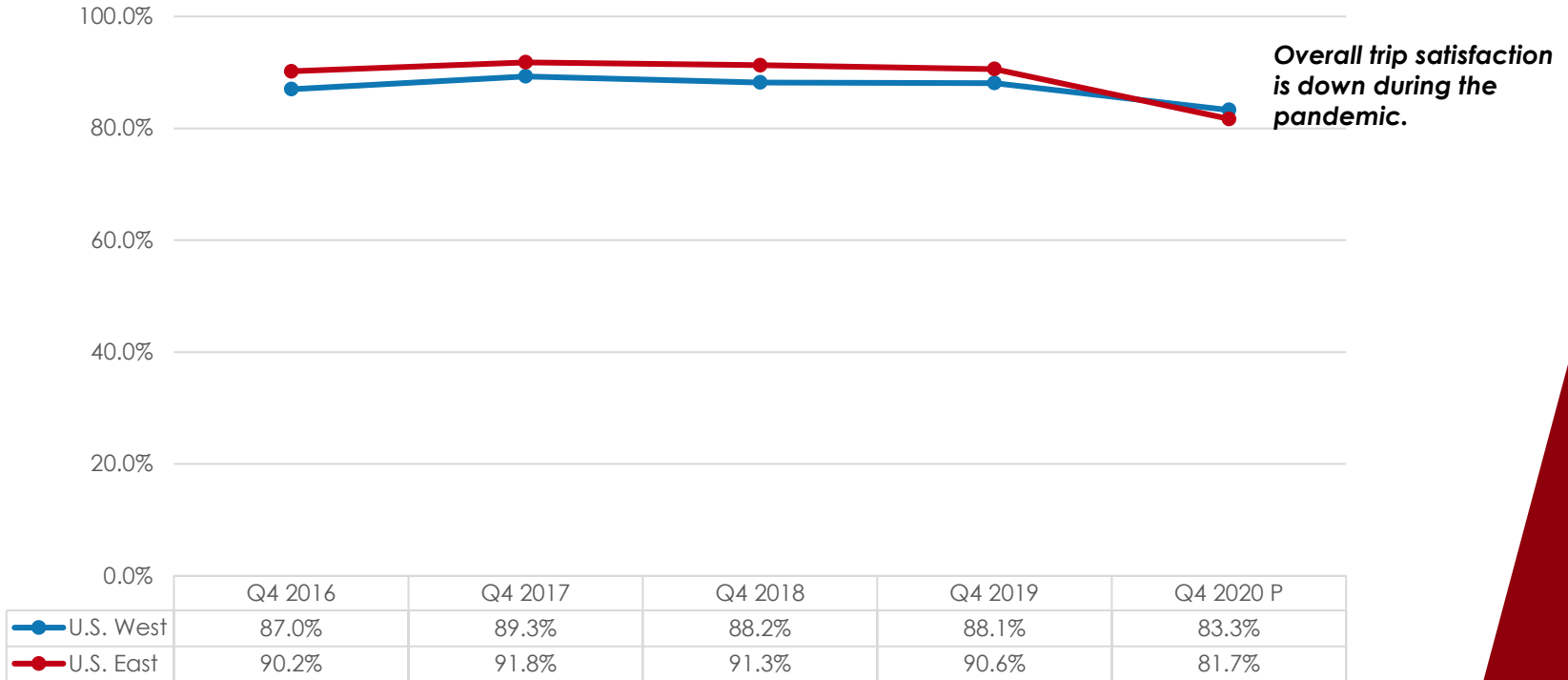
# SATISFACTION – STATE OF HAWAI‘I BY MMA

- **Travel party size:** Amongst U.S. West travelers, those who came by themselves provided lower satisfaction scores compared to those who came with others in their travel party.
- **Age:** Satisfaction was higher among younger travelers (under 35 years old) from both U.S. West and U.S. East and decreased with age.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than males.



# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



P= Preliminary Data

# BRAND/DESTINATION – ADVOCACY

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



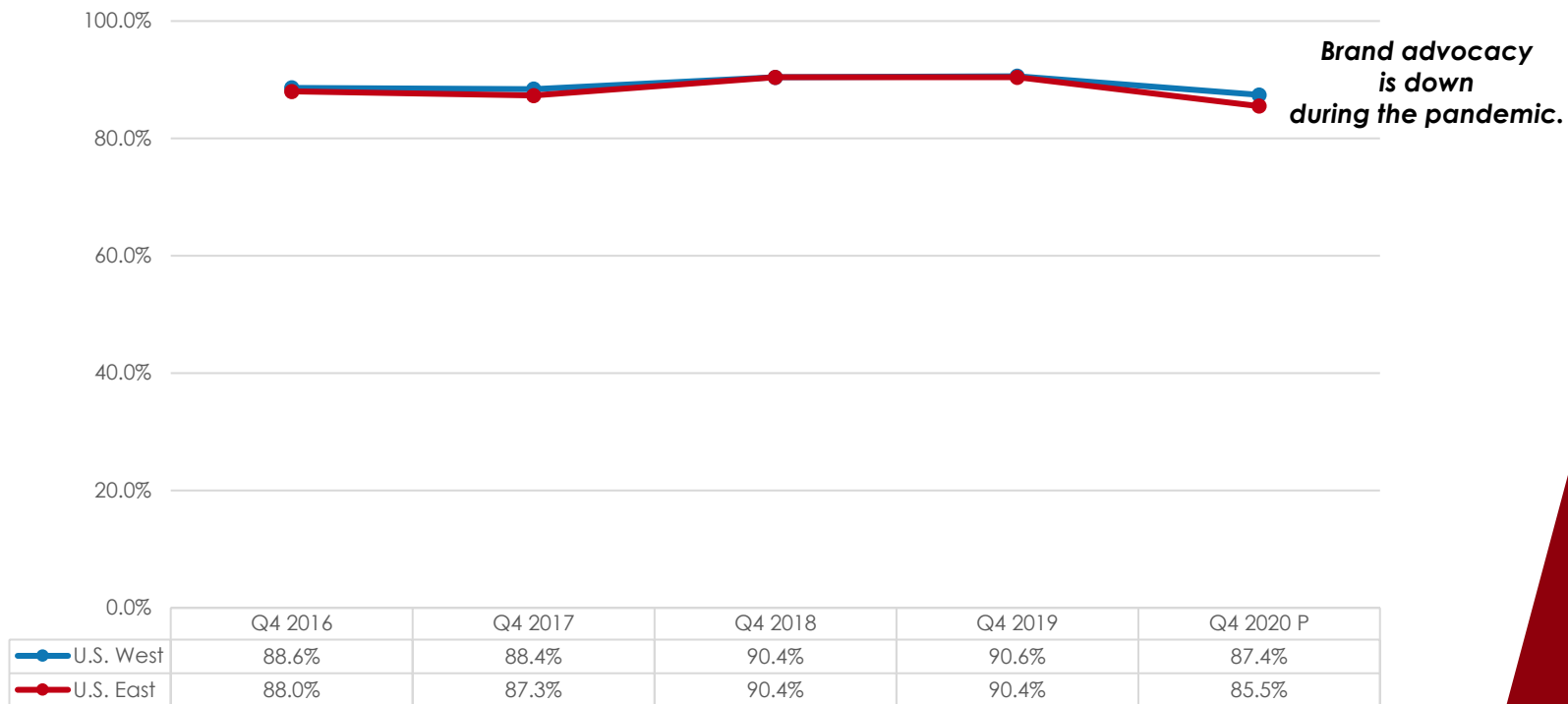
	U.S. West	U.S. East
■ Very likely (7-8)	87.4%	85.5%
■ Somewhat likely (5-6)	8.0%	8.6%
■ Somewhat unlikely (3-4)	1.9%	2.2%
■ Very unlikely (1-2)	2.4%	3.0%
■ Not Sure	0.4%	0.6%
BASE	8,619	4,239
▲ MEAN	7.48	7.39

# BRAND/DESTINATION – ADVOCACY

- **Age:** Younger travelers, or those under the age of 35, from both U.S. West and U.S. East gave higher brand advocacy scores compared to other age groups in their market.
- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to males.
- **Travel party size:** Among travelers from U.S. West, those who came in groups of three or more expressed a greater likelihood to recommend the state to others.

# BRAND/DESTINATION – ADVOCACY

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



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



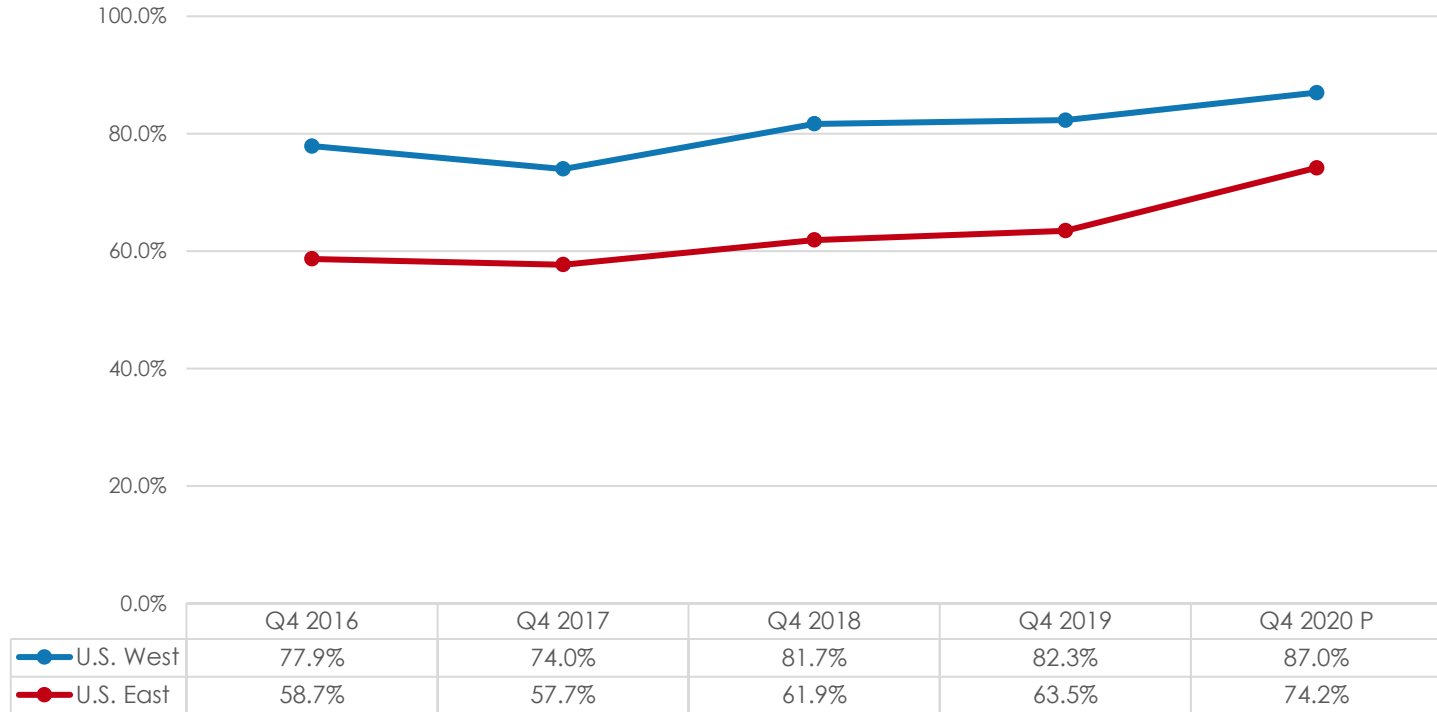
	U.S. West	U.S. East
■ Very likely (7-8)	87.0%	74.2%
■ Somewhat likely (5-6)	8.6%	15.6%
■ Somewhat unlikely (3-4)	1.8%	4.5%
■ Very unlikely (1-2)	1.8%	4.1%
■ Not Sure	0.8%	1.5%
BASE	8,619	4,239
▲ MEAN	7.53	7.04

# LIKELIHOOD OF RETURN VISIT

- **Education:** U.S. East visitors without a college degree indicated a greater likelihood to return to the state compared to more educated visitors from this market.
- **Gender:** Female visitors from both U.S. West and U.S. East were more likely to return to the state than their male counterparts.
- **Age:** U.S. West visitors under the age of 35, as well as senior visitors (age 65+), appeared less likely to return to the state compared to U.S. travelers who were between these two age brackets.
- **Household income:** Among U.S. West travelers, those with combined household incomes that exceeded \$100K appeared more likely to return to the islands than U.S. West visitors with combined household incomes below this threshold.
- **Travel Agent:** Those visitors from U.S. West and U.S. East who did not book their trip through a travel agent expressed a greater likelihood to return to the state compared to those who used a travel agent.

# LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

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

Q4 2019	Q4 2020 P
45.9% Too expensive	36.4% COVID-19
41.2% Want to go someplace new	25.9% Too expensive
23.3% Too crowded/ congested/ traffic	24.2% Unfriendly people/ felt unwelcome
17.7% Too commercialized/ overdeveloped	17.0% Poor value
16.9% Poor value	16.8% Want to go someplace new
12.9% Flight is too long	14.5% No compelling reason to return
12.1% Other financial obligations	13.0% Poor service
10.5% Five years is too soon	
10.5% No compelling reason to return	

P= Preliminary Data



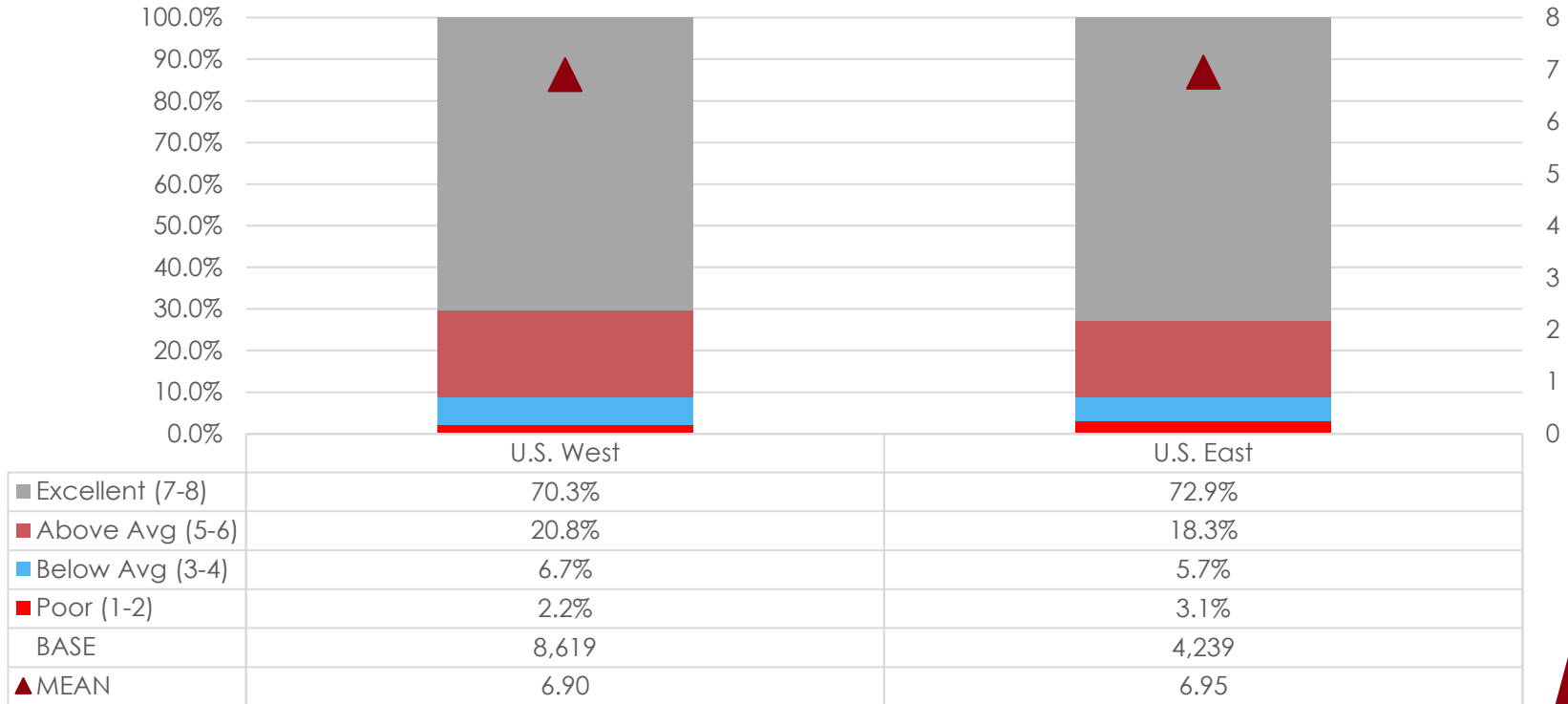
# UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q4 2019	Q4 2020 P
48.8% Too expensive	31.3% Too expensive
45.4% Flight is too long	27.5% COVID-19
39.1% Want to go someplace new	26.9% Want to go someplace new
16.9% Five years is too soon	21.4% Flight is too long
14.7% Poor value	19.9% Unfriendly people/ Felt unwelcome
11.3% Other financial obligations	14.5% Poor value
10.9% Too crowded/ congested/ traffic	13.1% Poor service
10.2% No compelling reason to return	11.3% Five years is too soon
	10.6% No compelling reason to return

P= Preliminary Data

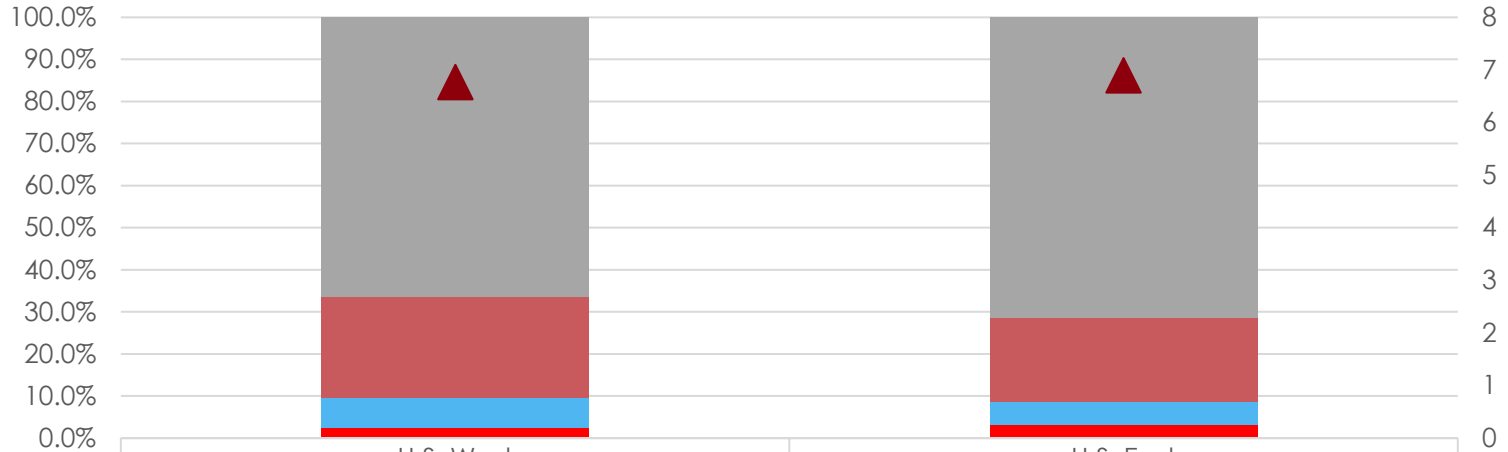
# OFFERING A VARIETY OF EXPERIENCES

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



# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

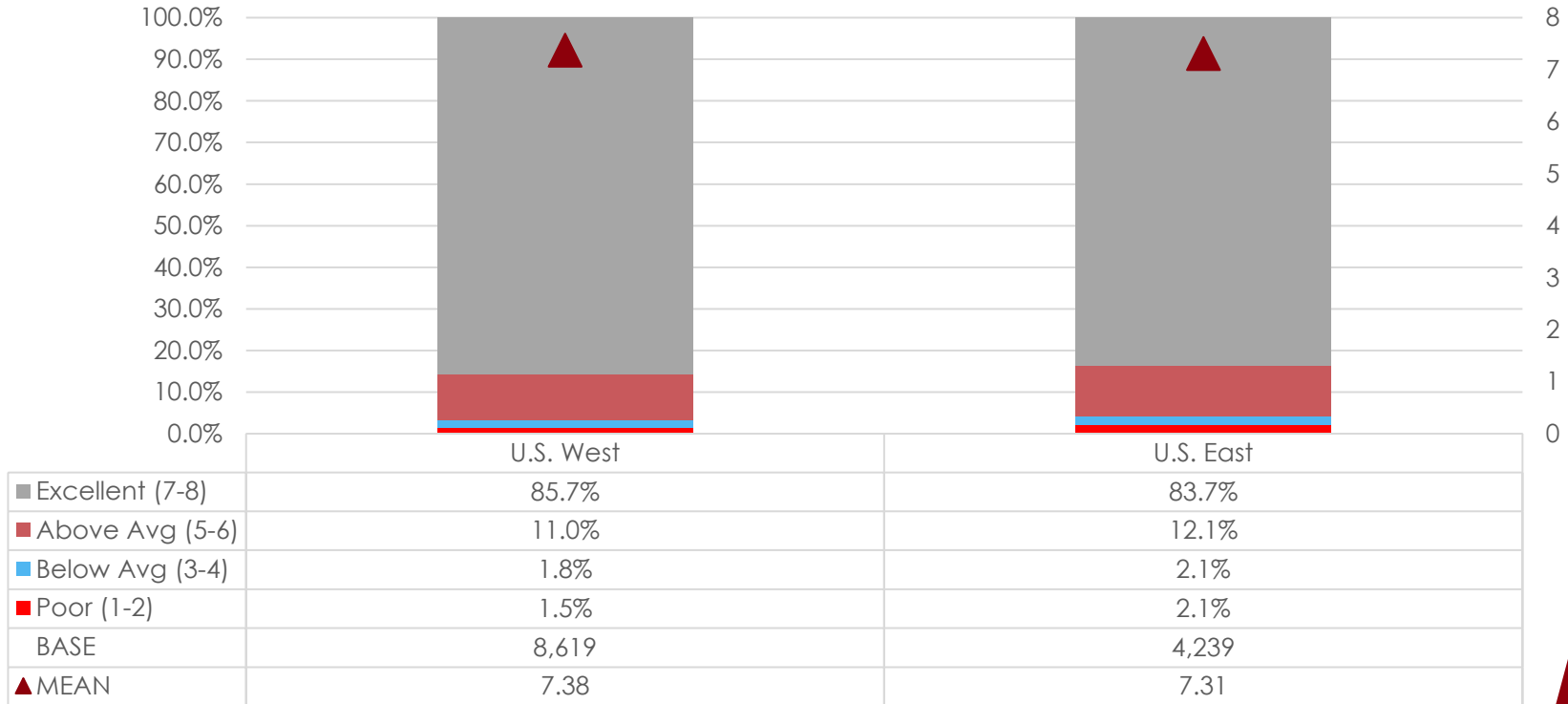
8-pt Rating Scale  
8=Excellent / 1=Poor



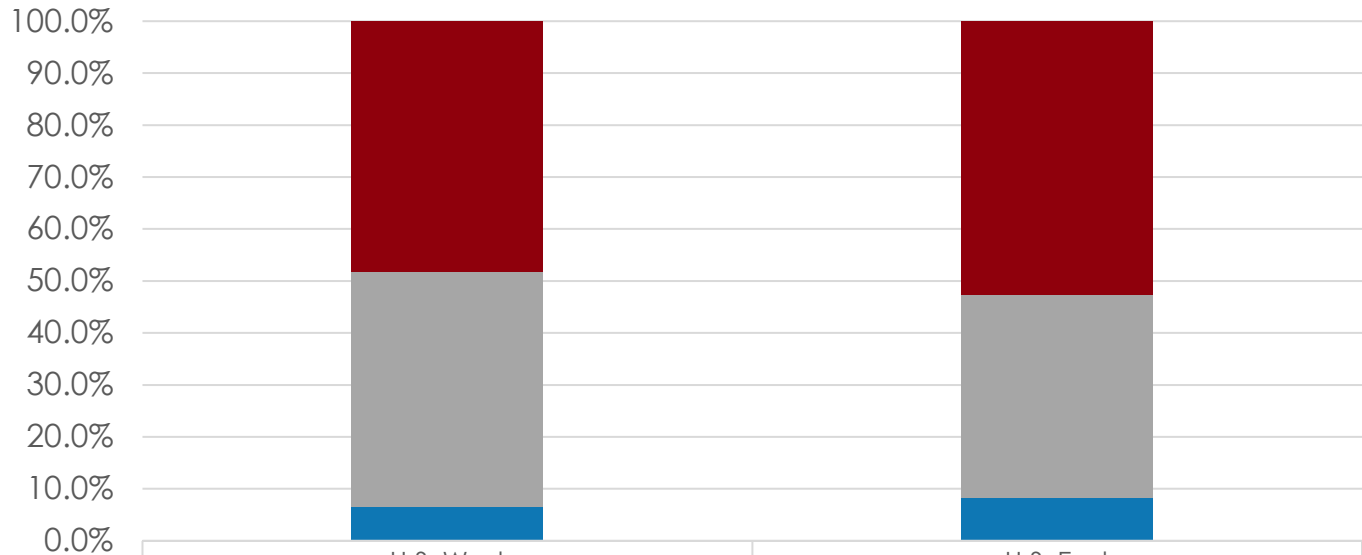
	U.S. West	U.S. East
■ Excellent (7-8)	66.5%	71.4%
■ Above Avg (5-6)	23.8%	19.9%
■ Below Avg (3-4)	7.3%	5.4%
■ Poor (1-2)	2.4%	3.3%
BASE	8,619	4,239
▲ MEAN	6.77	6.90

# BEING A SAFE AND SECURE DESTINATION

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



# SATISFACTION – HAWAI'I TRIP EXPECTATIONS



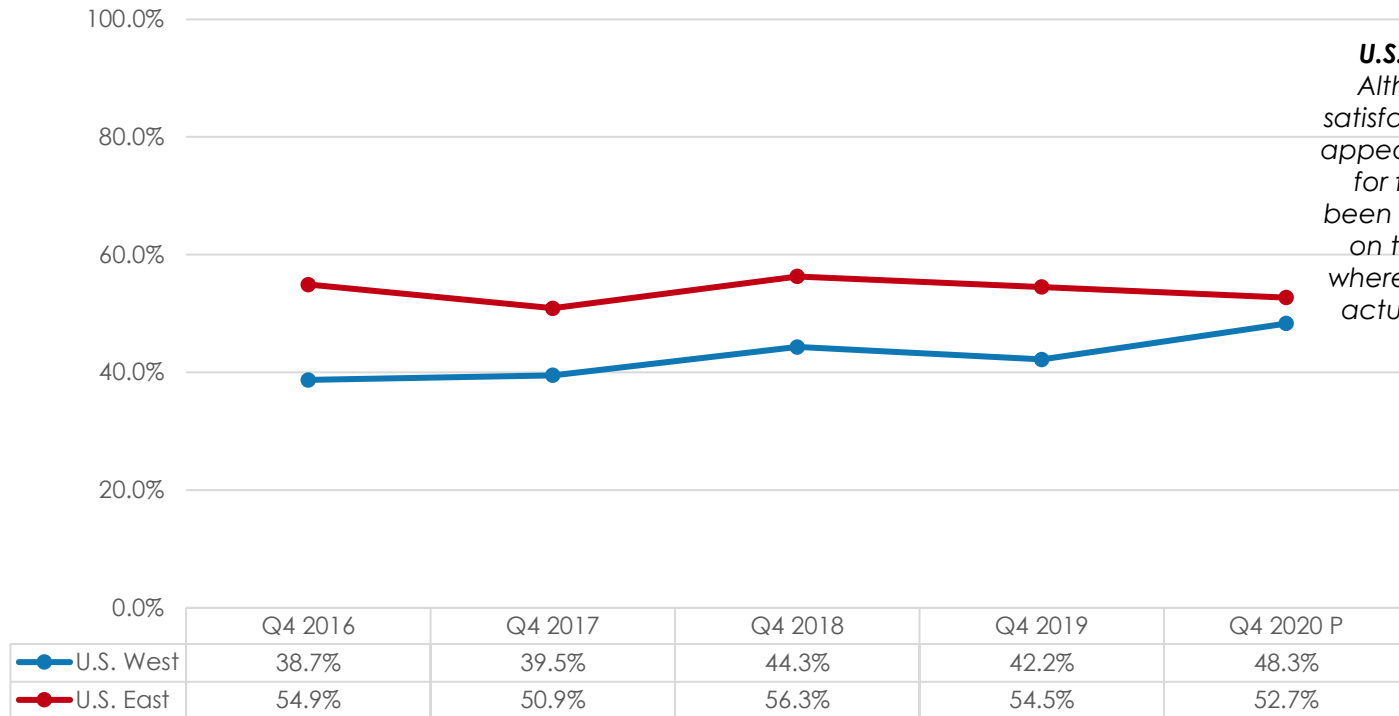
	U.S. West	U.S. East
■ Exceeded expectations	48.3%	52.7%
■ Met expectations	45.2%	39.0%
■ Did NOT meet expectations	6.5%	8.3%
BASE	8,619	4,239

# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Age:** Ratings of exceeded expectations were higher among younger travelers from both U.S. West and U.S. East compared to other age groups.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to agree that their trip exceeded their expectations than males from these visitor markets.
- **Education:** Among U.S. West visitors, those with a college degree felt more positively about their trip exceeding their expectations compared to those without a college degree.
- **Household income:** Among U.S. East visitors, a higher percentage of those with household income of less than \$100K said their trip exceeded their expectations compared to more affluent visitors from this market.
- **Repeat vs First-time visitors:** First-time visitors were more likely to feel the trip exceeded their expectations than repeat visitors. This is true for both U.S. West and U.S. East.

# SATISFACTION – HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



**U.S. West Visitors**  
 Although overall satisfaction is down, it appears expectations for their trip have been adjusted based on the pandemic where this metric has actually improved.

P= Preliminary Data

# Section 2

# ACTIVITIES



## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
<b>TOTAL</b>	93.2%	94.3%
<b>On own (self guided)</b>	84.0%	85.9%
<b>Helicopter/ airplane</b>	2.9%	4.5%
<b>Boat/ submarine/ whale</b>	20.7%	26.3%
<b>Visit towns/communities</b>	45.8%	49.8%
<b>Limo/ van/ bus tour</b>	1.8%	3.9%
<b>Scenic views/ natural landmark</b>	53.1%	62.3%
<b>Movie/ TV/ film location</b>	3.0%	5.3%

# ACTIVITIES – RECREATION

	U.S. West	U.S. East
<b>TOTAL</b>	96.6%	95.8%
<b>Beach/ sunbathing</b>	87.3%	87.6%
<b>Bodyboarding</b>	17.3%	11.0%
<b>Standup paddle board</b>	9.4%	8.2%
<b>Surfing</b>	12.2%	10.9%
<b>Canoeing/ kayak</b>	7.6%	8.5%
<b>Swim in the ocean</b>	71.9%	69.7%
<b>Snorkeling</b>	53.6%	46.6%
<b>Freediving</b>	2.4%	2.3%
<b>Windsurf/ Kitesurf</b>	0.4%	0.4%
<b>Jet ski/ Parasail</b>	1.8%	2.1%
<b>Scuba diving</b>	4.7%	4.8%
<b>Fishing</b>	4.0%	3.9%
<b>Golf</b>	9.3%	8.1%

## ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
<b>TOTAL</b>	96.6%	95.8%
<b>Run/ Jog/ Fitness walk</b>	41.5%	38.0%
<b>Spa</b>	6.4%	6.7%
<b>Hiking</b>	48.9%	55.1%
<b>Backpack/ camp</b>	1.8%	3.0%
<b>Agritourism</b>	7.0%	10.4%
<b>Sport event/ tournament</b>	0.6%	0.8%
<b>Park/ botanical garden</b>	26.3%	35.3%
<b>Waterpark</b>	0.7%	1.0%
<b>Mountain tube/ waterfall rappel</b>	1.5%	1.5%
<b>Zip lining</b>	3.4%	3.4%
<b>Skydiving</b>	0.4%	0.5%
<b>All terrain vehicle (ATV)</b>	2.8%	4.9%
<b>Horseback riding</b>	2.0%	2.5%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
<b>TOTAL</b>	98.4%	97.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	16.5%	21.9%
<b>Live music/ stage show</b>	8.6%	11.1%
<b>Nightclub/ dancing/ bar/ karaoke</b>	3.7%	4.4%
<b>Fine dining</b>	46.1%	46.5%
<b>Family restaurant</b>	57.7%	54.9%
<b>Fast food</b>	37.8%	43.0%
<b>Food truck</b>	38.9%	43.6%
<b>Café/ coffee house</b>	42.8%	43.0%
<b>Ethnic dining</b>	22.9%	27.1%
<b>Prepared own meal</b>	67.2%	59.4%

# ACTIVITIES – SHOPPING

	U.S. West	U.S. East
<b>TOTAL</b>	94.9%	94.0%
<b>Mall/ department store</b>	35.7%	39.4%
<b>Designer boutique</b>	14.6%	16.0%
<b>Hotel/ resort store</b>	20.9%	23.2%
<b>Swap meet/ flea market</b>	9.0%	11.2%
<b>Discount/ outlet store</b>	13.1%	14.3%
<b>Supermarket</b>	74.8%	67.8%
<b>Farmer's market</b>	29.8%	27.3%
<b>Convenience store</b>	46.1%	48.2%
<b>Duty free store</b>	1.5%	2.7%
<b>Local shop/ artisan</b>	55.9%	58.6%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
<b>TOTAL</b>	40.5%	53.1%
<b>Historic military site</b>	10.9%	23.5%
<b>Other historical site</b>	18.6%	22.3%
<b>Museum/ art gallery</b>	7.6%	10.2%
<b>Luau/ Polynesian show/ hula show</b>	4.3%	8.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	1.7%	2.4%
<b>Play/ concert/ theatre</b>	0.4%	0.9%
<b>Art/ craft fair</b>	5.7%	5.7%
<b>Festival event</b>	4.3%	4.3%

# ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East
<b>TOTAL</b>	87.2%	81.6%
<b>Airport shuttle</b>	8.3%	8.5%
<b>Trolley</b>	1.1%	1.1%
<b>Public bus</b>	1.6%	2.4%
<b>Tour bus/ tour van</b>	1.4%	3.0%
<b>Taxi/ limo</b>	4.5%	6.1%
<b>Rental car</b>	79.4%	70.6%
<b>Ride share</b>	11.8%	15.7%
<b>Bicycle rental</b>	2.9%	3.2%

## ACTIVITIES – OTHER

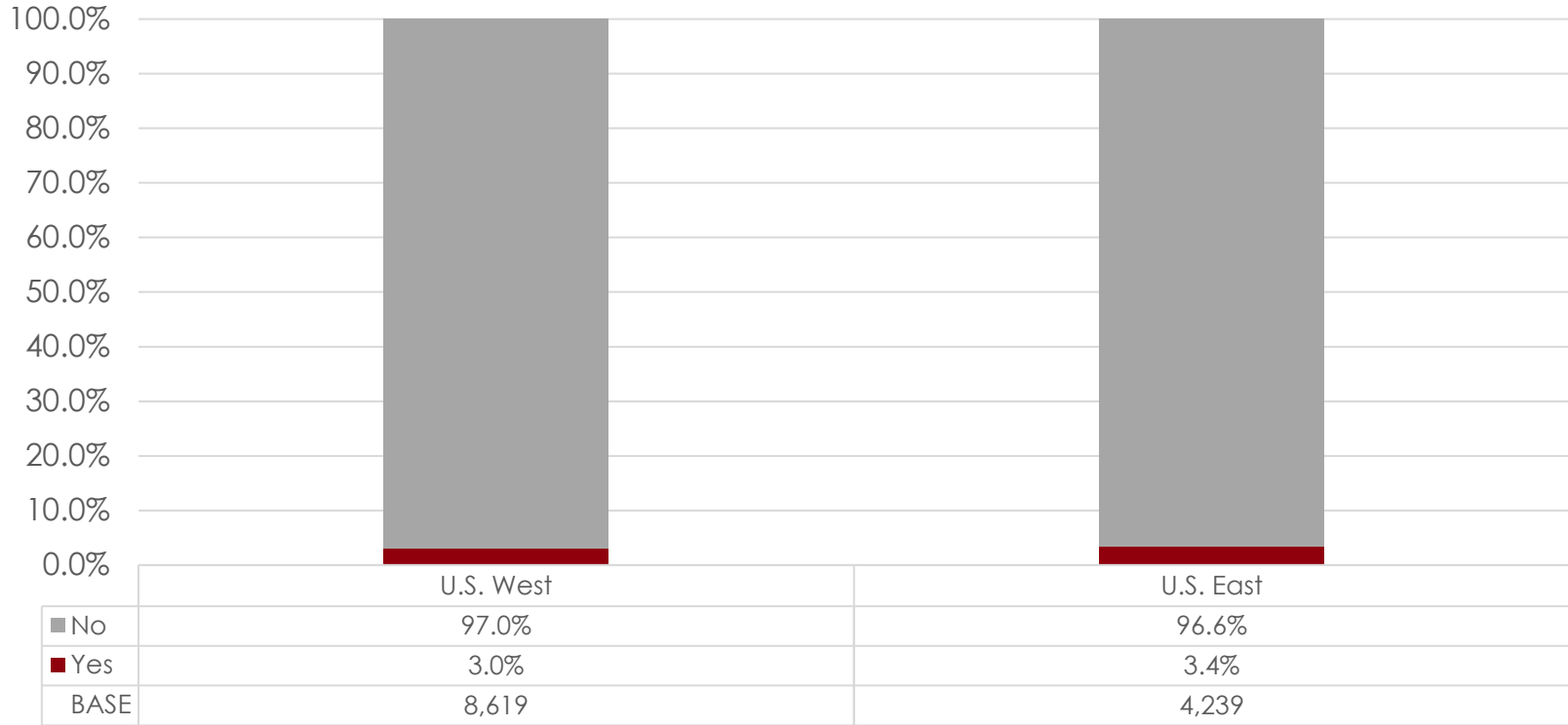
	U.S. West	U.S. East
<b>TOTAL</b>	34.9%	40.1%
<b>Visit friends/ family</b>	34.6%	39.6%
<b>Volunteer non profit</b>	0.7%	0.9%



# Section 3

# TRAVELERS WITH DISABILITIES

# DISABLED TRAVELER – REQUIRED ASSISTANCE

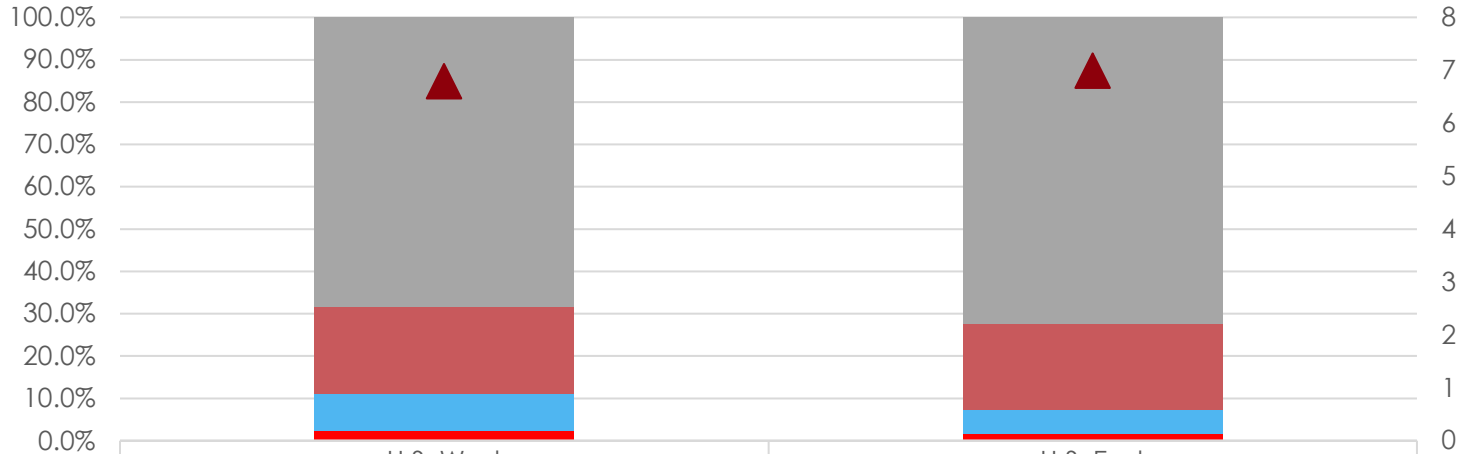


# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane)	75.1%	73.7%
Personal assistance	22.0%	16.4%
Other disability related aid	3.9%	7.1%
No one in our travel party required assistance	3.5%	6.5%
Orientation and mobility assistance	3.4%	2.8%
ASL Interpreter/ texting/ captioning	1.7%	0.7%
Lift equipped van	0.8%	0.7%
Service/ assistance animal	0.4%	-
Print material in alternate format	0.4%	-
<b>BASE</b>	253	140

# OVERALL ACCESSIBILITY – AIRPORTS

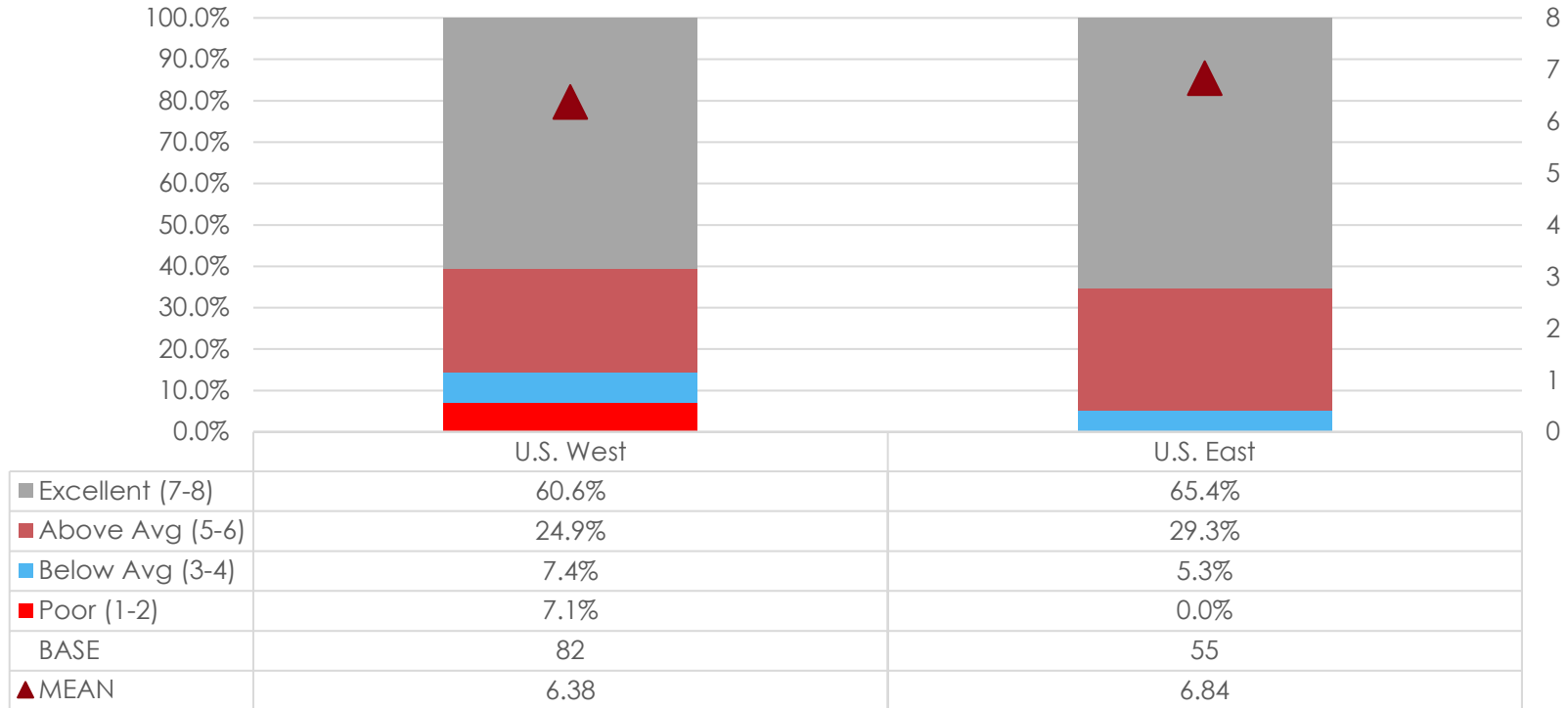
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	68.4%	72.4%
■ Above Avg (5-6)	20.6%	20.3%
■ Below Avg (3-4)	8.6%	5.8%
■ Poor (1-2)	2.4%	1.5%
BASE	255	138
▲ MEAN	6.79	6.99

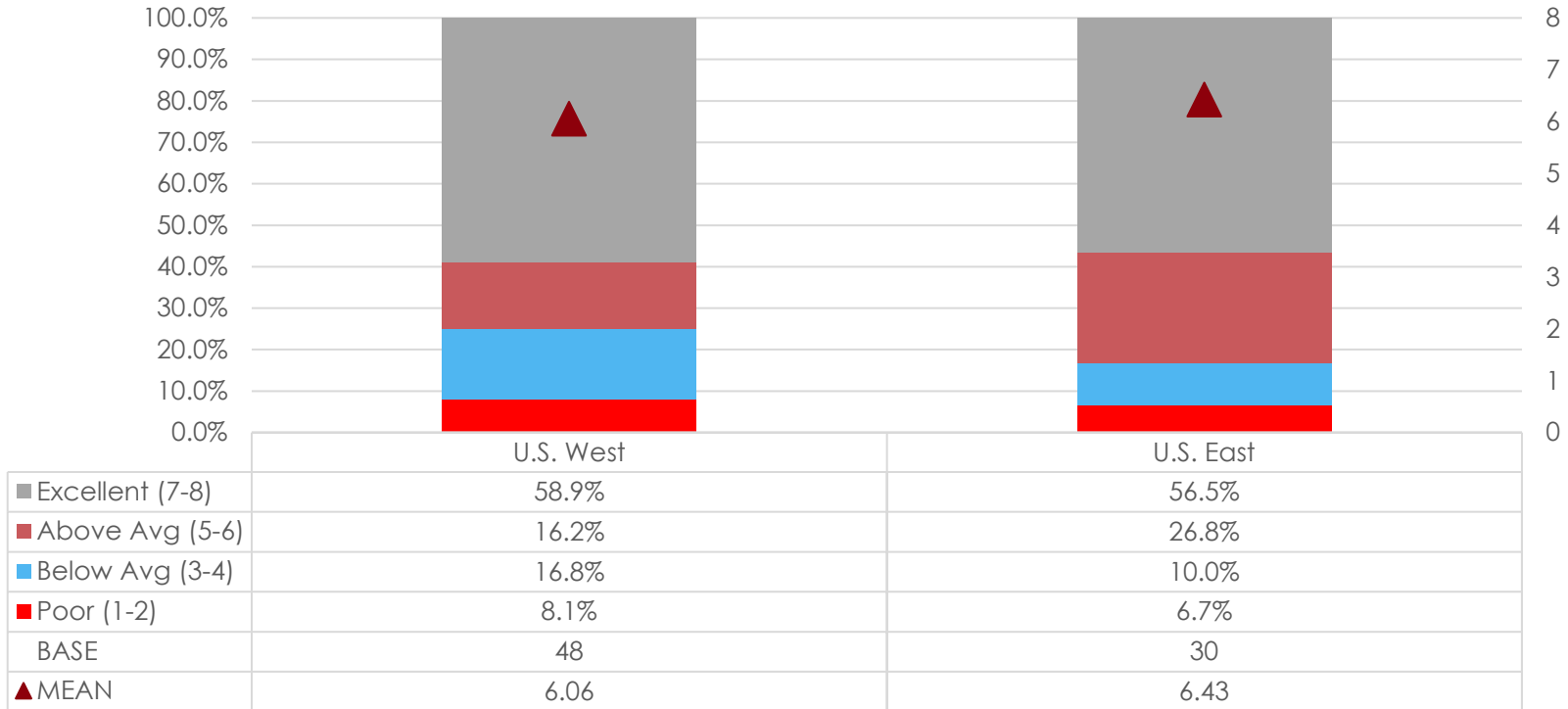
# OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

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



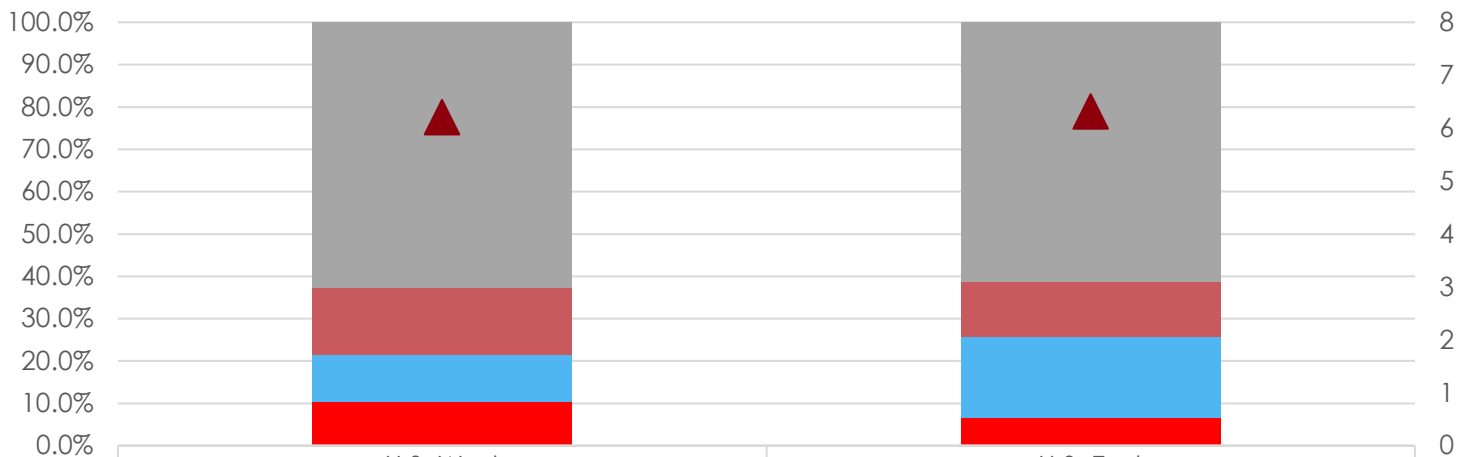
# OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



# OVERALL ACCESSIBILITY – RIDE SHARE

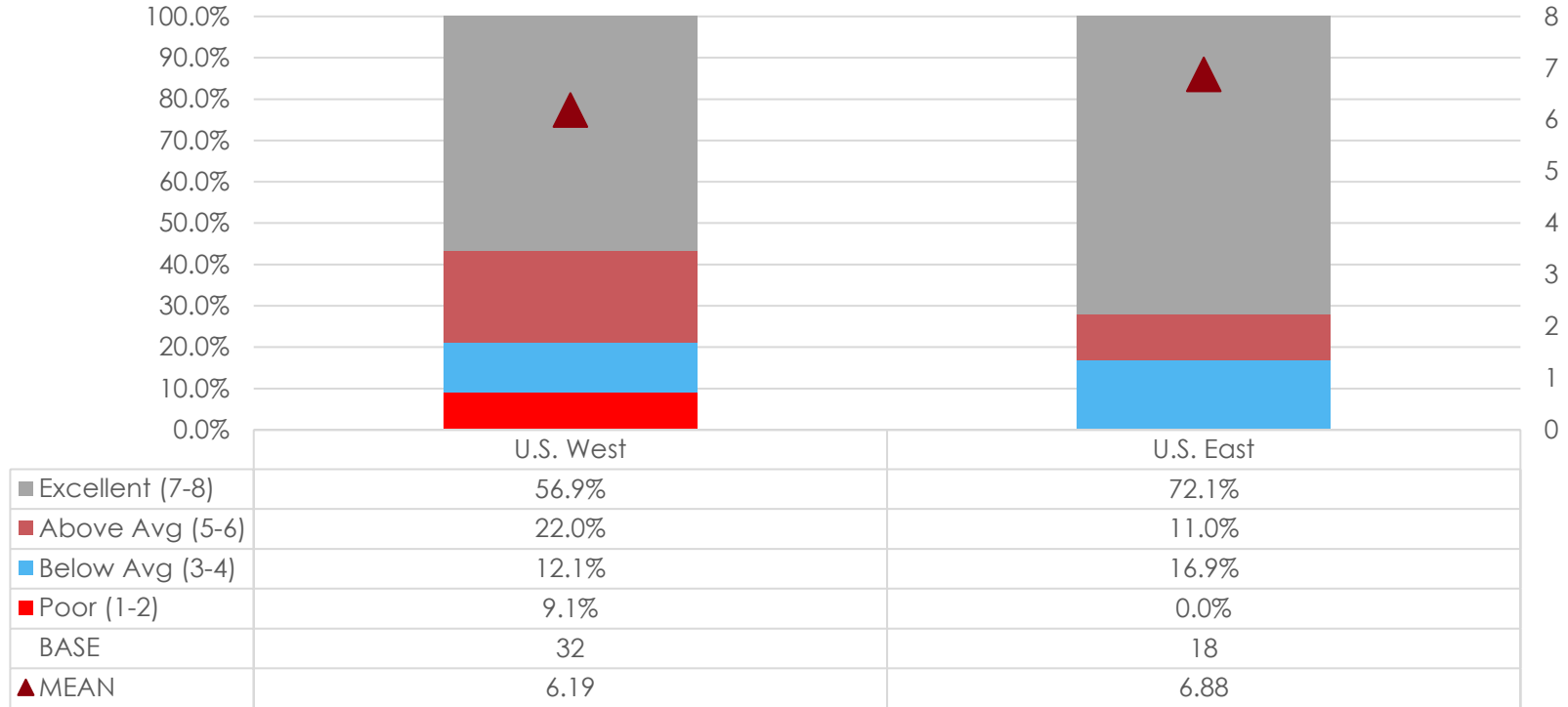
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	62.8%	61.4%
■ Above Avg (5-6)	15.8%	12.9%
■ Below Avg (3-4)	11.0%	19.3%
■ Poor (1-2)	10.4%	6.5%
BASE	46	31
▲ MEAN	6.21	6.32

# OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

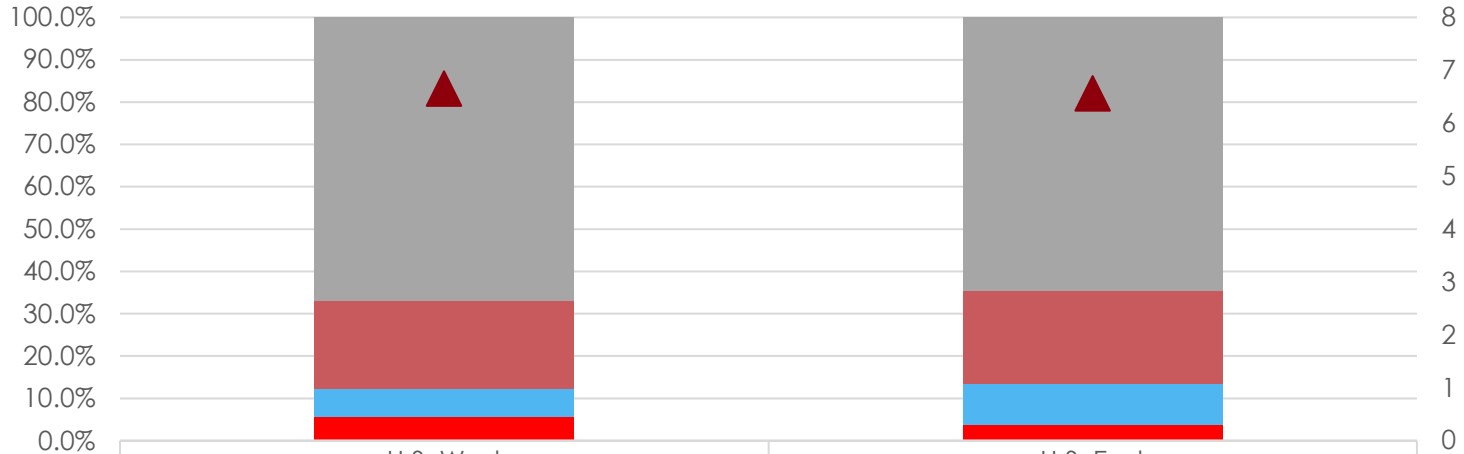
8-pt Rating Scale  
8=Excellent / 1=Poor





# OVERALL ACCESSIBILITY – HOTELS

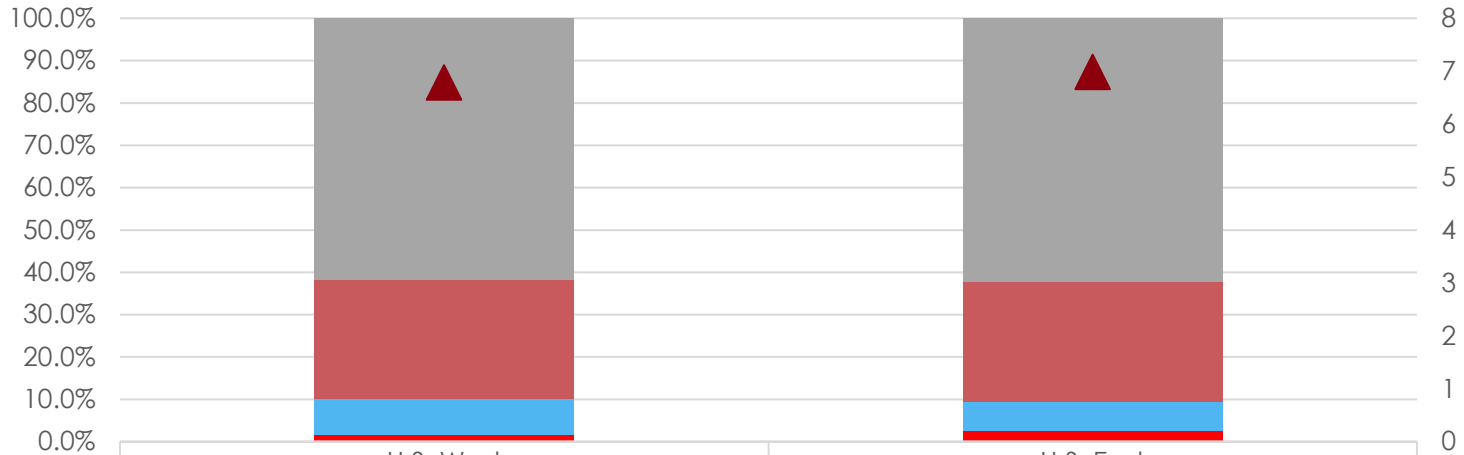
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	66.9%	64.6%
■ Above Avg (5-6)	20.8%	21.9%
■ Below Avg (3-4)	6.6%	9.8%
■ Poor (1-2)	5.7%	3.7%
BASE	140	82
▲ MEAN	6.65	6.56

# OVERALL ACCESSIBILITY – RESTAURANTS

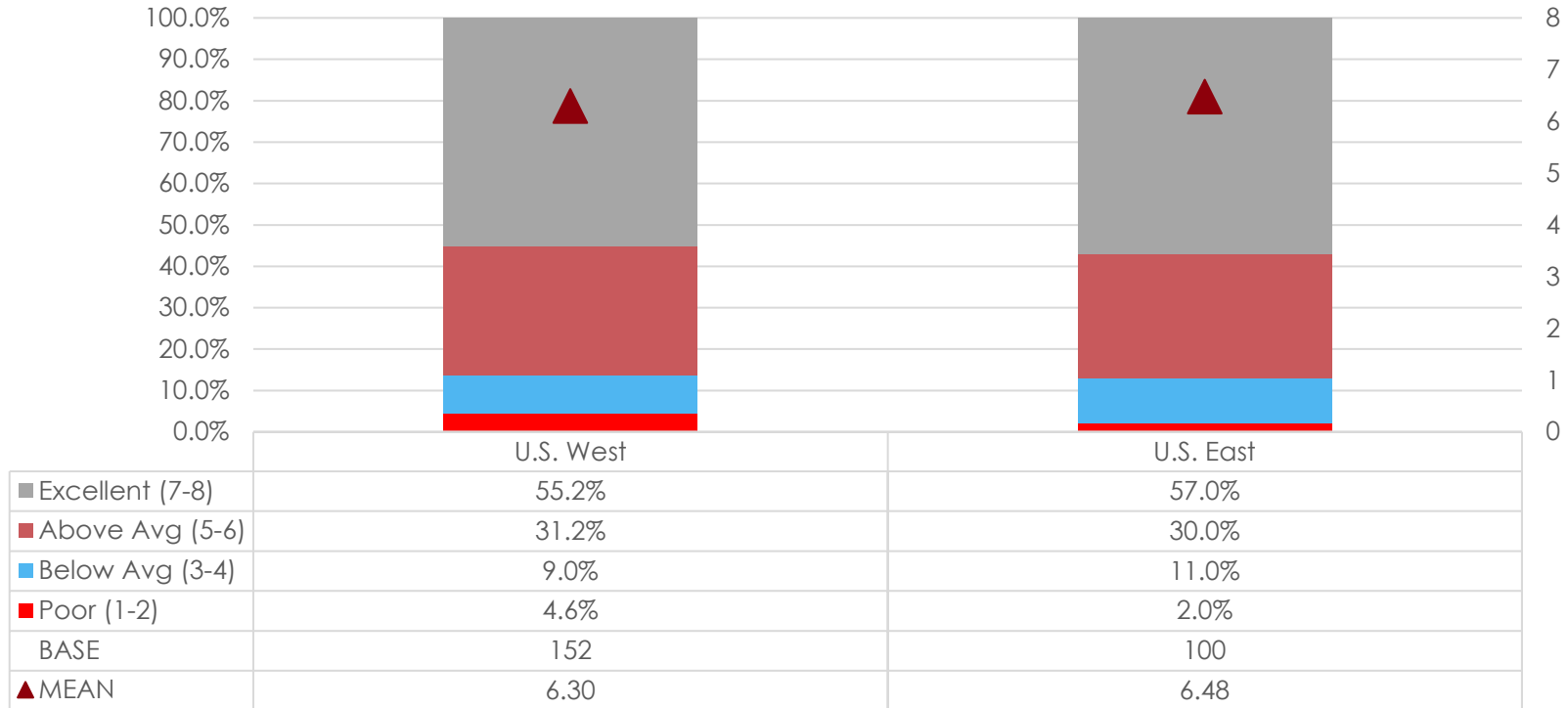
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	61.8%	62.4%
■ Above Avg (5-6)	28.1%	28.3%
■ Below Avg (3-4)	8.4%	6.8%
■ Poor (1-2)	1.7%	2.6%
BASE	225	117
▲ MEAN	6.79	6.99

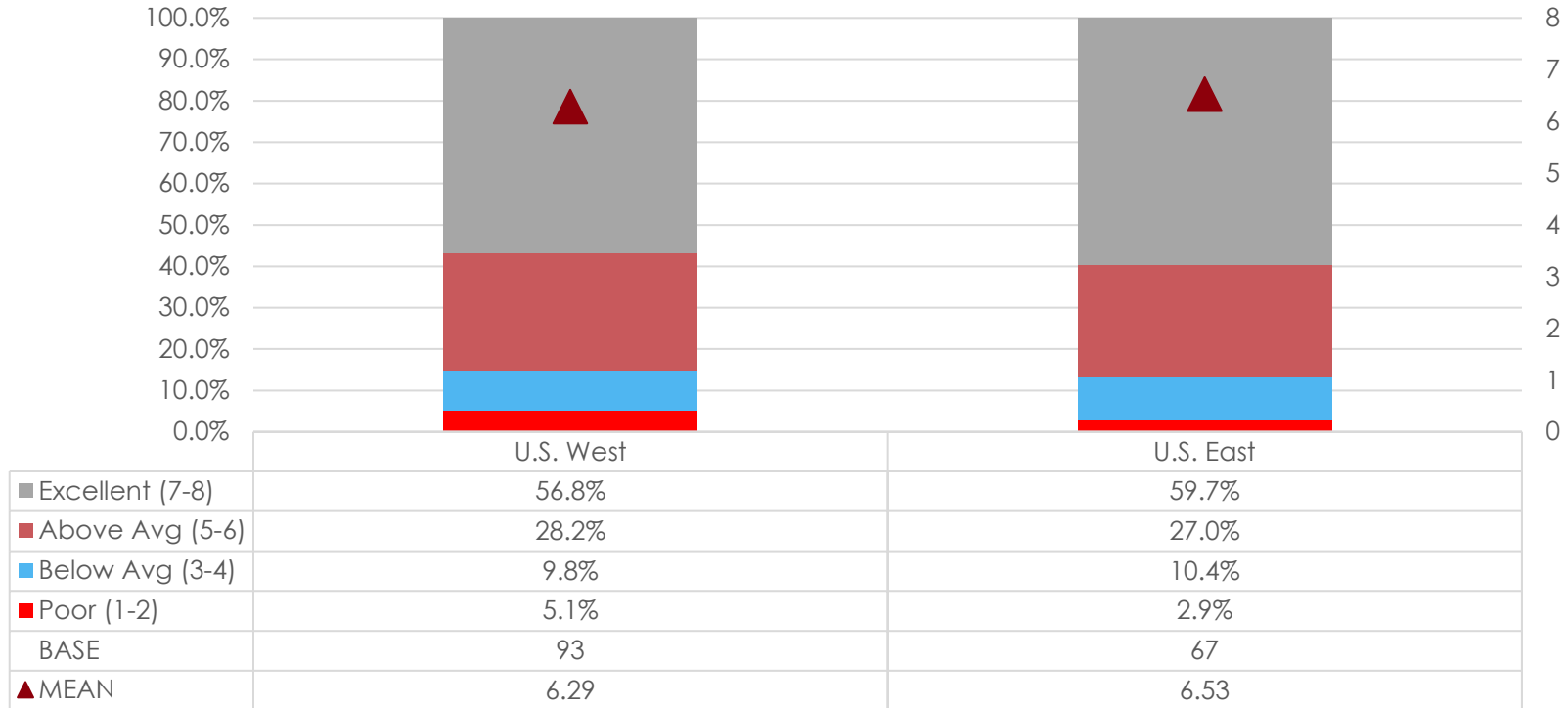
# OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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



# OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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

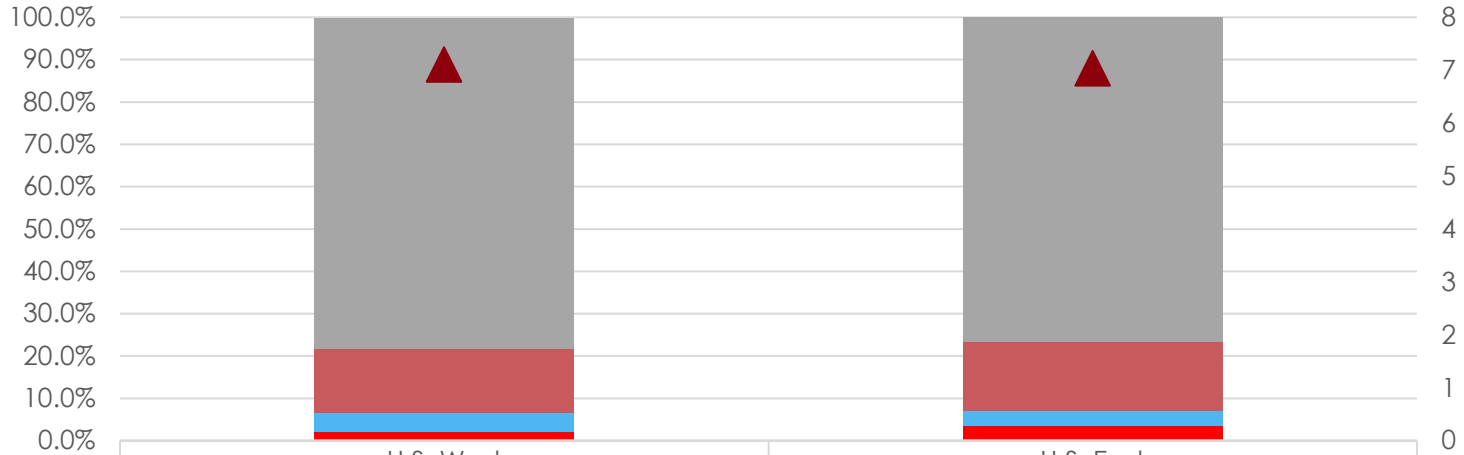


# Section 4

# ISLAND OF O'AHU

# SATISFACTION – O‘AHU

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



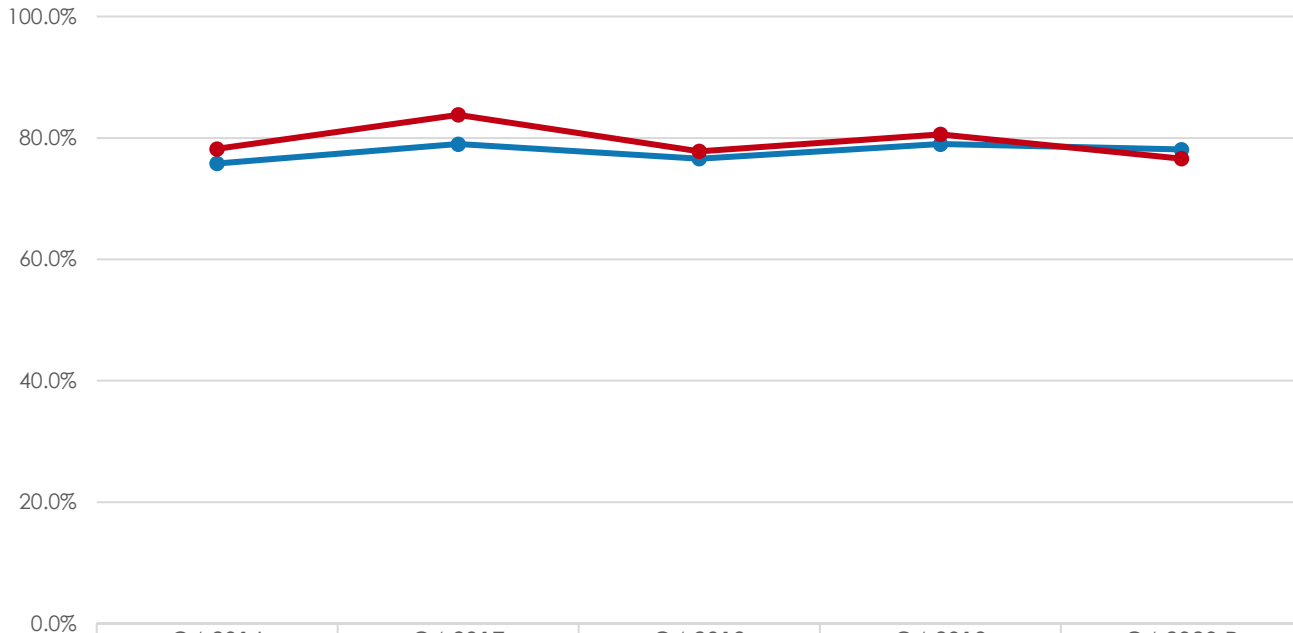
	U.S. West	U.S. East
■ Excellent (7-8)	78.1%	76.6%
■ Above Avg (5-6)	15.4%	16.1%
■ Below Avg (3-4)	4.3%	3.8%
■ Poor (1-2)	2.1%	3.4%
BASE	2,964	2,243
▲ MEAN	7.11	7.04

# SATISFACTION – O‘AHU

- **Age:** Younger travelers (under the age of 35) from both U.S. West and U.S. East showed the largest percentage of excellent ratings regarding their stay on O‘ahu. Seniors (age 65+) had the lowest percentage of excellent ratings among the age groups.
- **Gender:** A higher percentage of female visitors from both U.S. West and U.S. East gave excellent ratings regarding their stay on O‘ahu compared to male visitors.

# SATISFACTION – O‘AHU

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



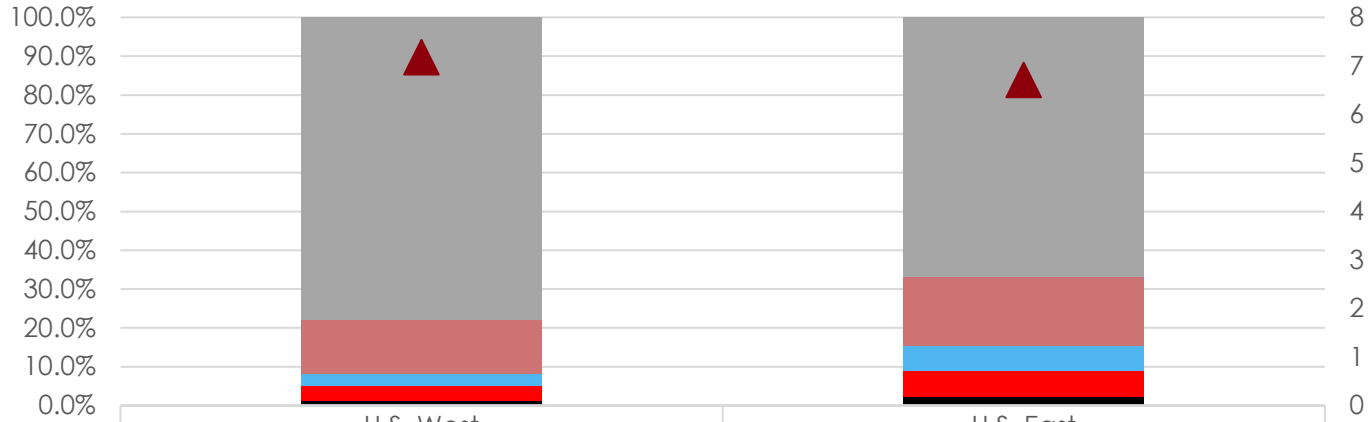
	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020 P
U.S. West	75.8%	79.0%	76.6%	79.0%	78.1%
U.S. East	78.2%	83.8%	77.8%	80.6%	76.6%

P= Preliminary Data



# LIKELIHOOD OF RETURN VISIT – O‘AHU

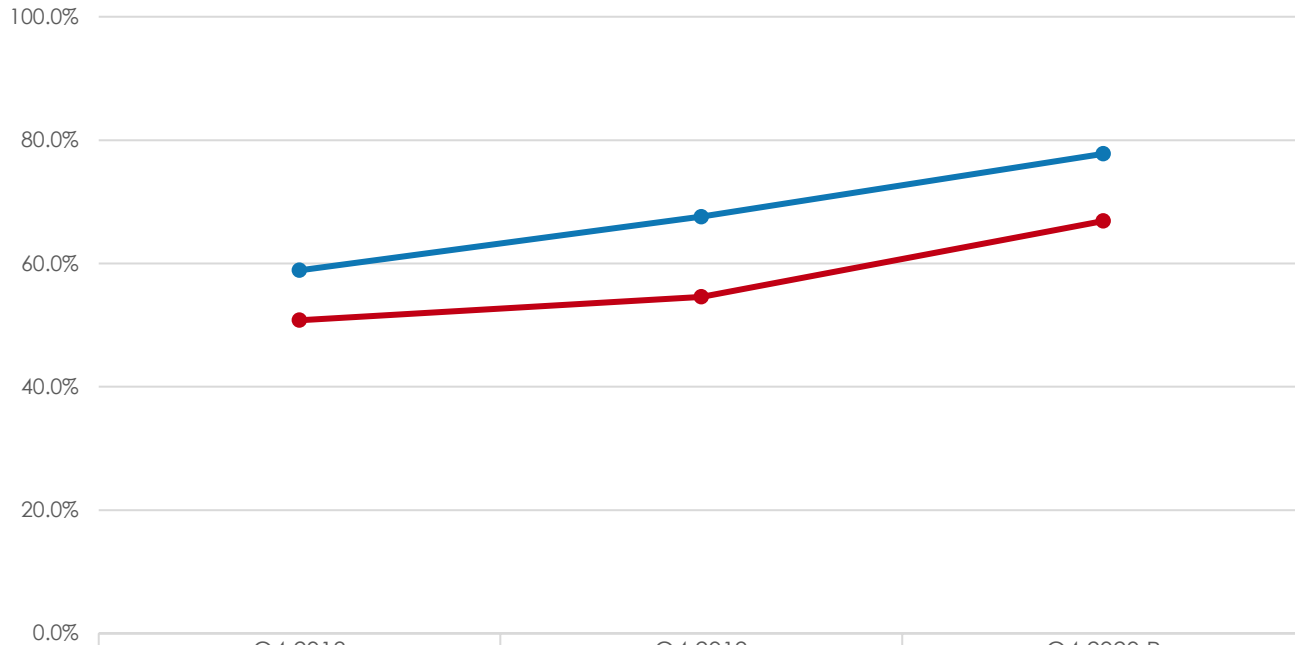
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	77.8%	66.9%
Somewhat likely (5-6)	14.0%	17.8%
Somewhat unlikely (3-4)	3.0%	6.5%
Very unlikely (1-2)	3.9%	6.7%
Not sure	1.3%	2.2%
BASE	2,795	2,084
▲ MEAN	7.18	6.71

# LIKELIHOOD OF RETURN VISIT – O‘AHU

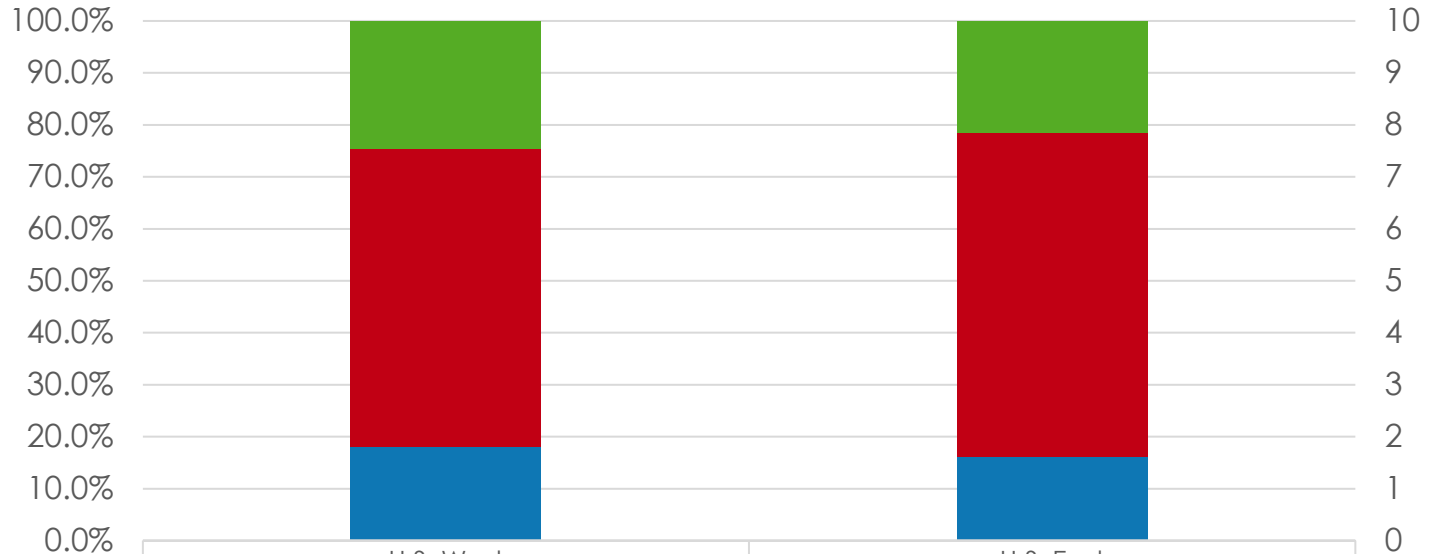
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020 P
U.S. West	58.9%	67.6%	77.8%
U.S. East	50.8%	54.6%	66.9%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
■ Aided Ad Awareness	24.5%	21.5%
■ No Prior Awareness	57.5%	62.4%
■ Unsure	18.0%	16.1%
BASE	2,795	2,084

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
<b>Atlantis Submarine &amp; Cruises</b>	0.2%	0.6%
<b>Bernice P. Bishop Museum</b>	2.7%	3.3%
<b>Byodo In Temple</b>	7.2%	9.3%
<b>Chinatown &amp; Honolulu Art District</b>	10.8%	12.0%
<b>Diamond Head State Monument</b>	10.7%	16.6%
<b>Dole Plantation</b>	17.2%	24.1%
<b>Haleiwa</b>	29.5%	29.8%
<b>Hanauma Bay Nature Reserve</b>	7.5%	9.7%
<b>Harold L. Lyon Arboretum</b>	0.7%	1.1%
<b>Hawai‘i State Art Museum or Honolulu Museum of Art</b>	1.1%	1.9%
<b>Hawaiian Mission Houses, Historic Site and Archive</b>	0.4%	0.5%
<b>Hawai‘i’s Plantation Village</b>	0.5%	0.7%
<b>Honolulu Zoo</b>	4.3%	7.0%

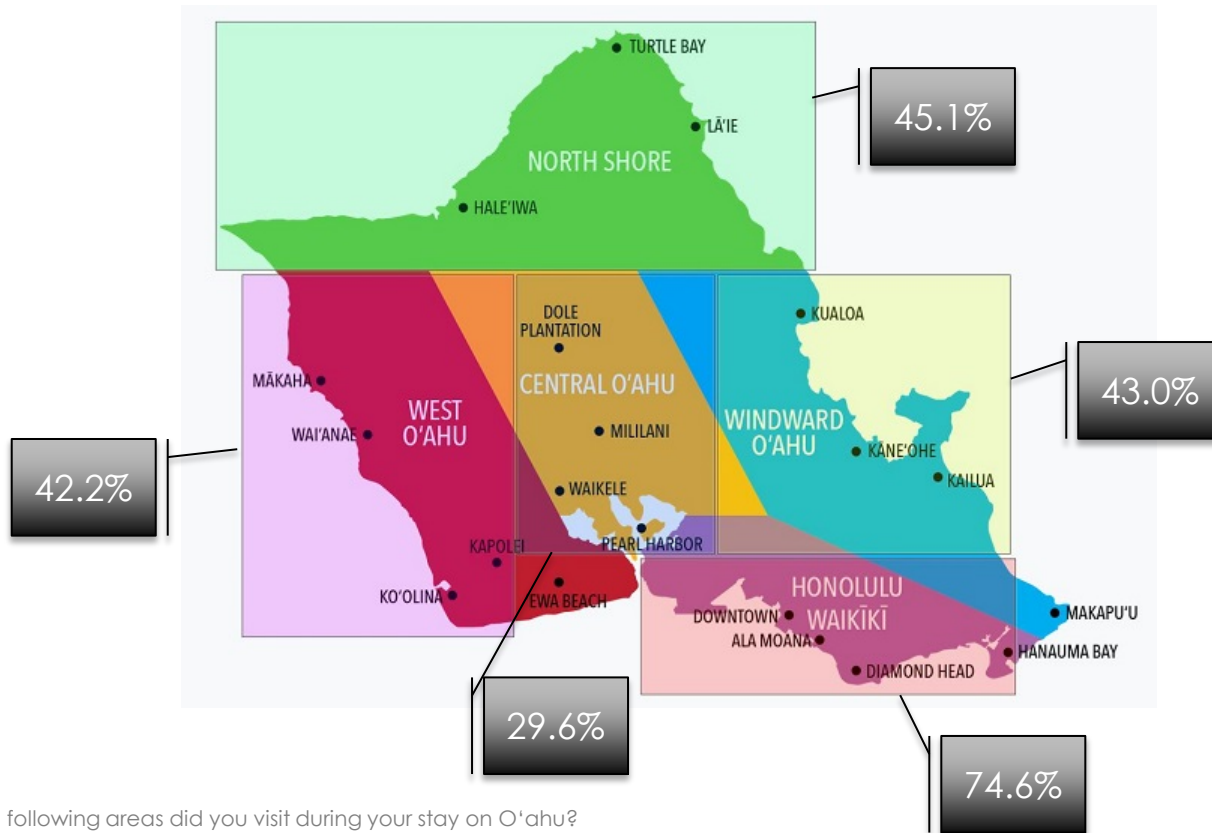
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Ho‘omaluhia Botanical Garden</b>	6.5%	7.9%
<b>Iolani Palace State Monument</b>	3.0%	4.0%
<b>Kaiwi State Scenic Shoreline/ Makapuu Trail</b>	6.5%	11.9%
<b>Kakaako Street Art</b>	1.8%	2.4%
<b>Koko Head Crater Trail</b>	9.0%	12.9%
<b>Kualoa Private Nature Reserve</b>	8.4%	12.0%
<b>Lanikai or Kailua Beach</b>	36.7%	40.6%
<b>Manoa Falls &amp; Trail</b>	6.2%	10.1%
<b>National Memorial Cemetery of the Pacific</b>	4.6%	7.9%
<b>Nuuanu Pali Lookout</b>	12.1%	16.0%
<b>North Shore Beaches</b>	55.5%	61.3%

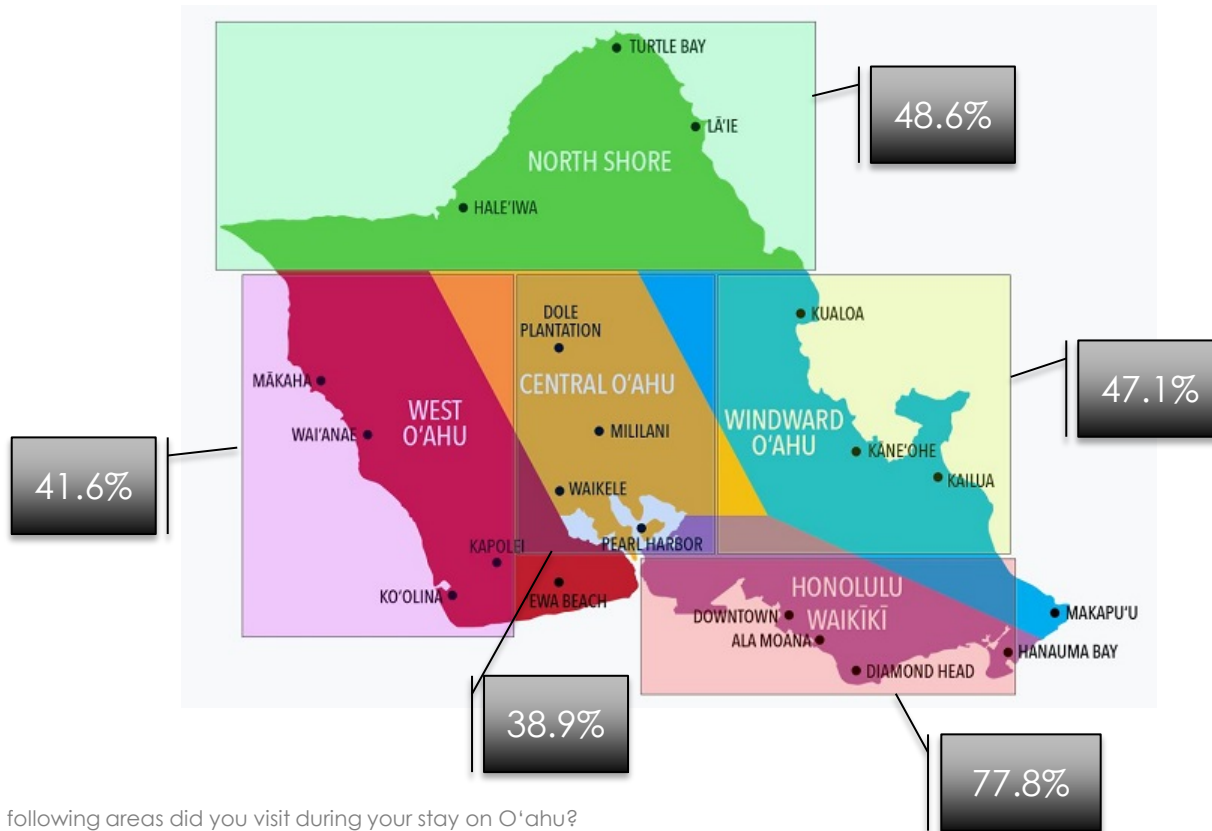
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Pearl Harbor</b>	24.2%	39.1%
<b>Polynesian Cultural Center</b>	2.4%	2.2%
<b>Queen Emma’s Summer Palace</b>	0.6%	1.2%
<b>Sea Life Park Hawai‘i</b>	0.8%	0.9%
<b>Waikiki Aquarium</b>	0.3%	0.6%
<b>Waimanalo Beach Park</b>	13.0%	16.8%
<b>Waimea Valley</b>	17.3%	21.3%

# AREAS VISITED U.S. WEST



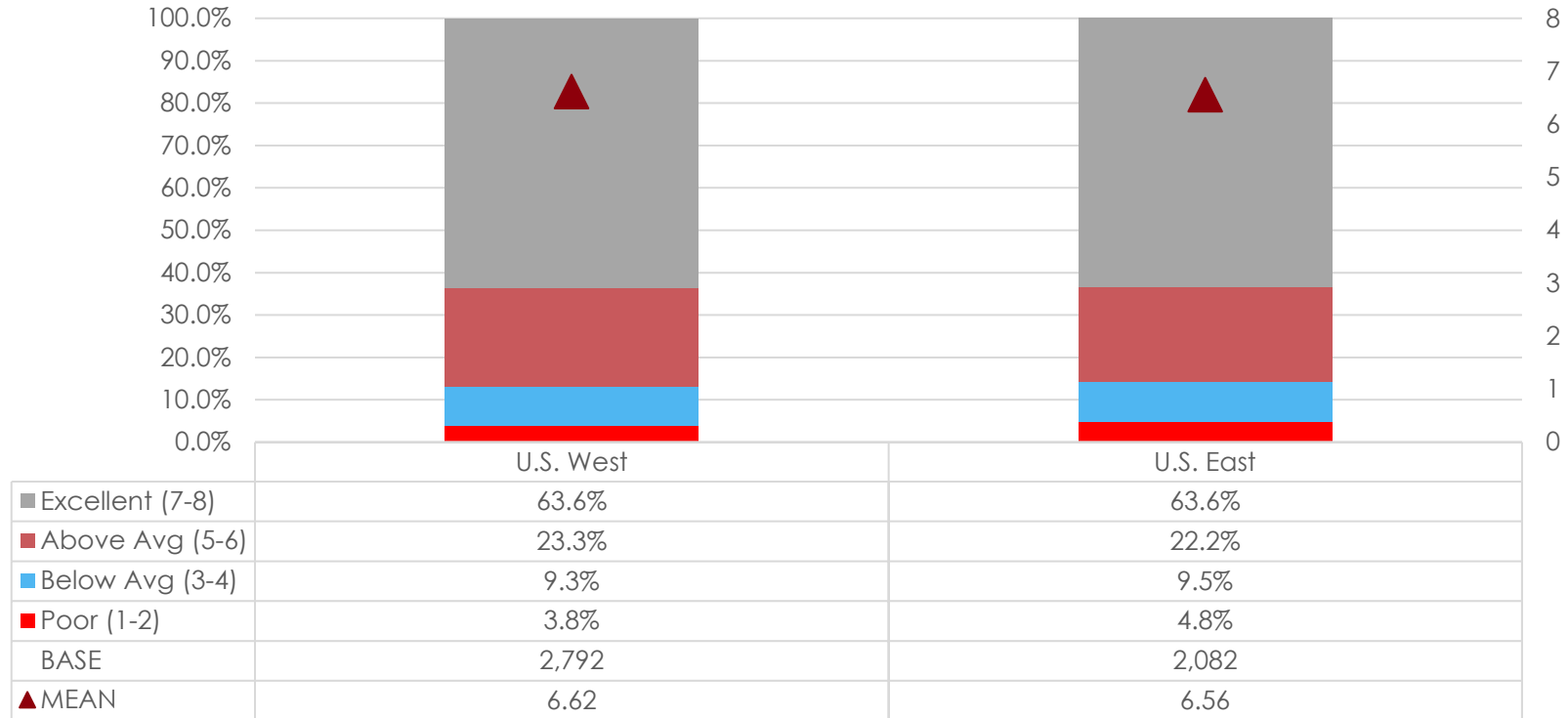
# AREAS VISITED U.S. EAST



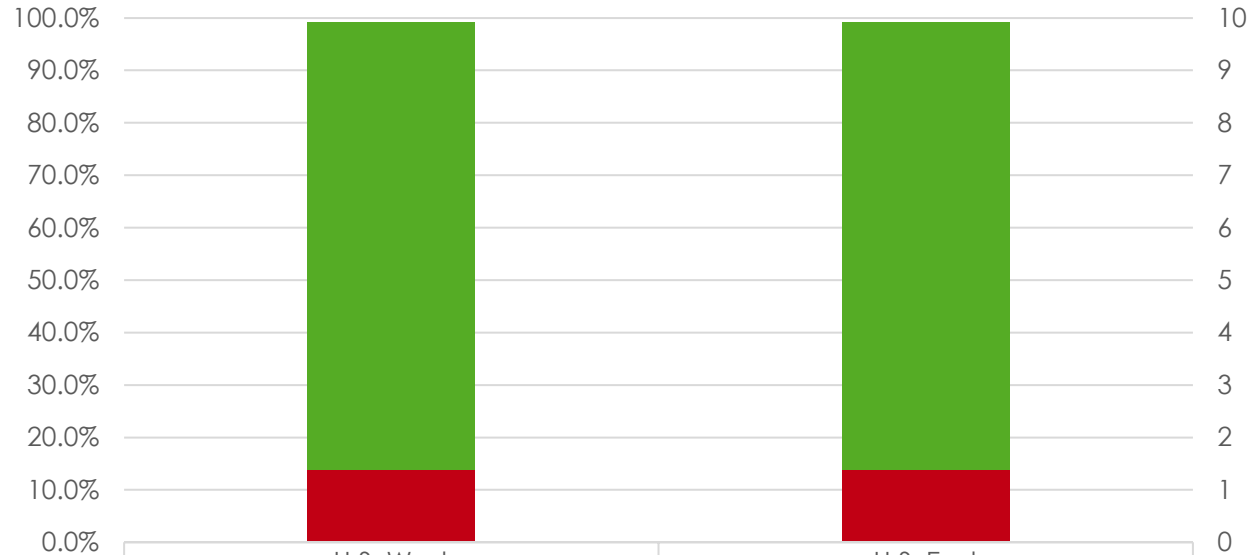


# SATISFACTION – Daniel K. Inouye International Airport

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



# SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	85.3%	85.4%
■ Full-face snorkel mask	13.4%	13.4%
■ Goggles/ Mask, no snorkel	0.4%	0.4%
BASE	1,058	680

# SNORKELING OCEAN SAFETY – O‘AHU

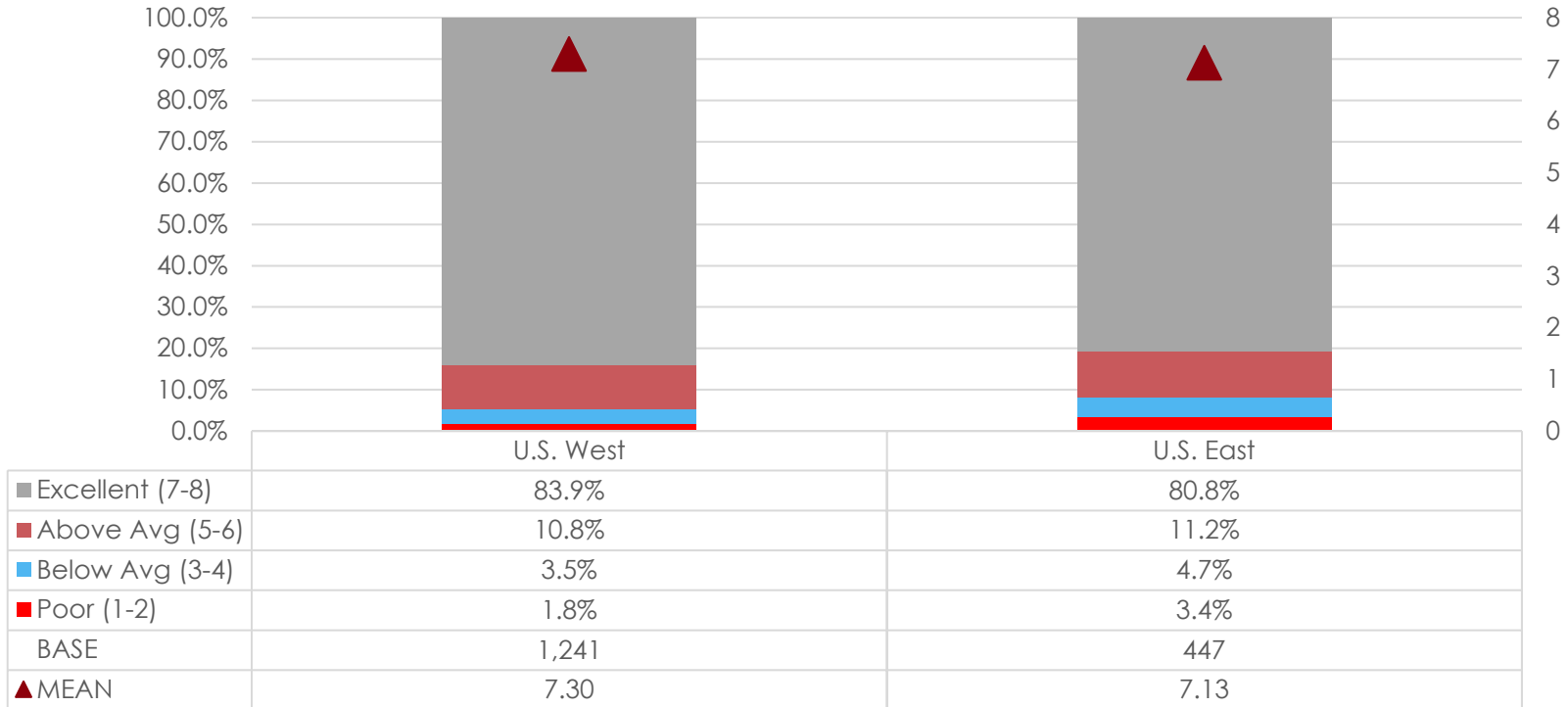
	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	97.7%	98.8%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	0.8%	0.7%
<b>Yes, while doing another type of ocean activity</b>	0.9%	0.4%
<b>BASE</b>	1,058	680

# Section 5

## ISLAND OF KAUA‘I

# SATISFACTION – KAUA‘I

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

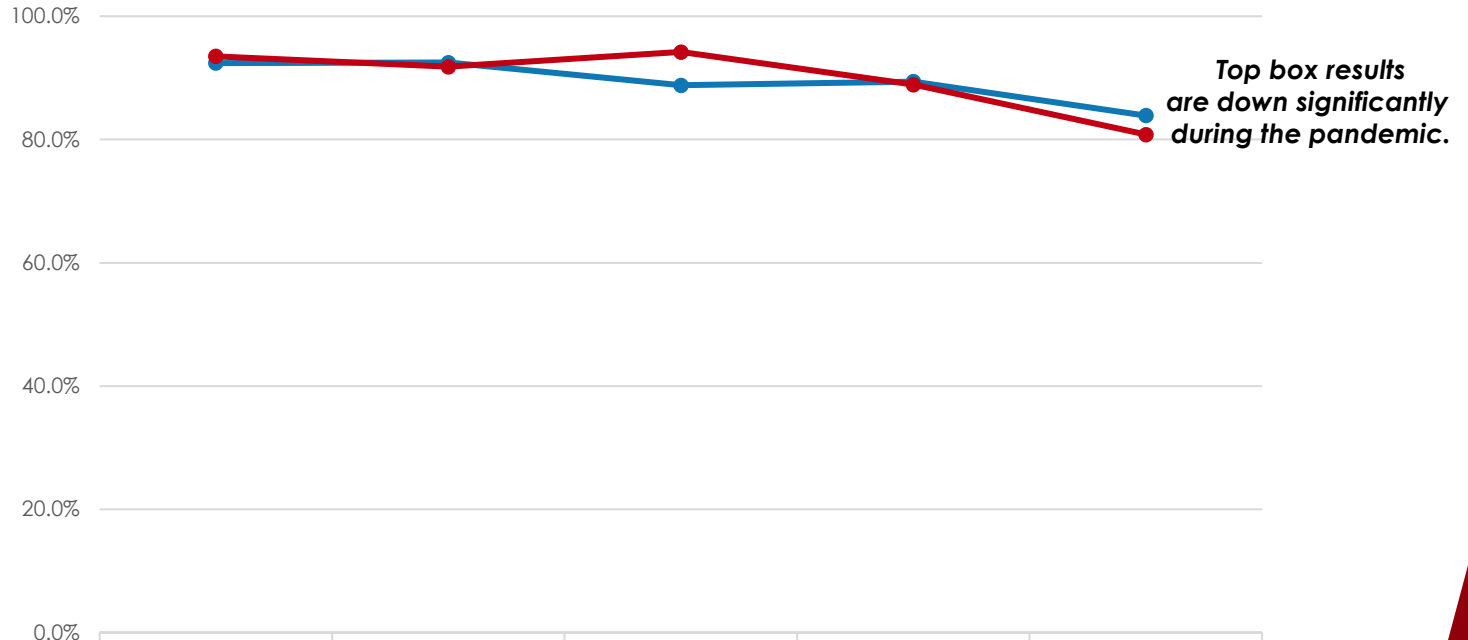


# SATISFACTION – KAUA‘I

- **Age:** Younger travelers from U.S. West were the most satisfied with their stay on Kaua‘i. Excellent ratings dropped significantly among visitors over 50 years of age.
- **Gender:** Female visitors from U.S. East were more satisfied with their stay on Kaua‘i than males from this visitor market.
- **First-time vs Repeat visitor:** Among travelers from U.S. West, first-time visitors to the state were more satisfied with their trip compared to repeat visitors.

# SATISFACTION – KAUA‘I

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

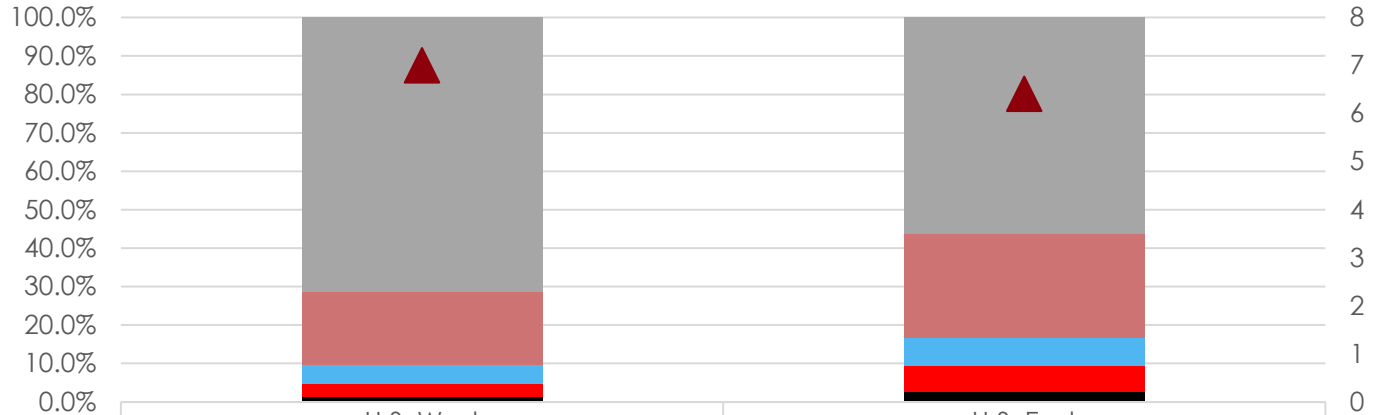


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020 P
U.S. West	92.4%	92.5%	88.8%	89.4%	83.9%
U.S. East	93.5%	91.8%	94.2%	88.9%	80.8%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

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

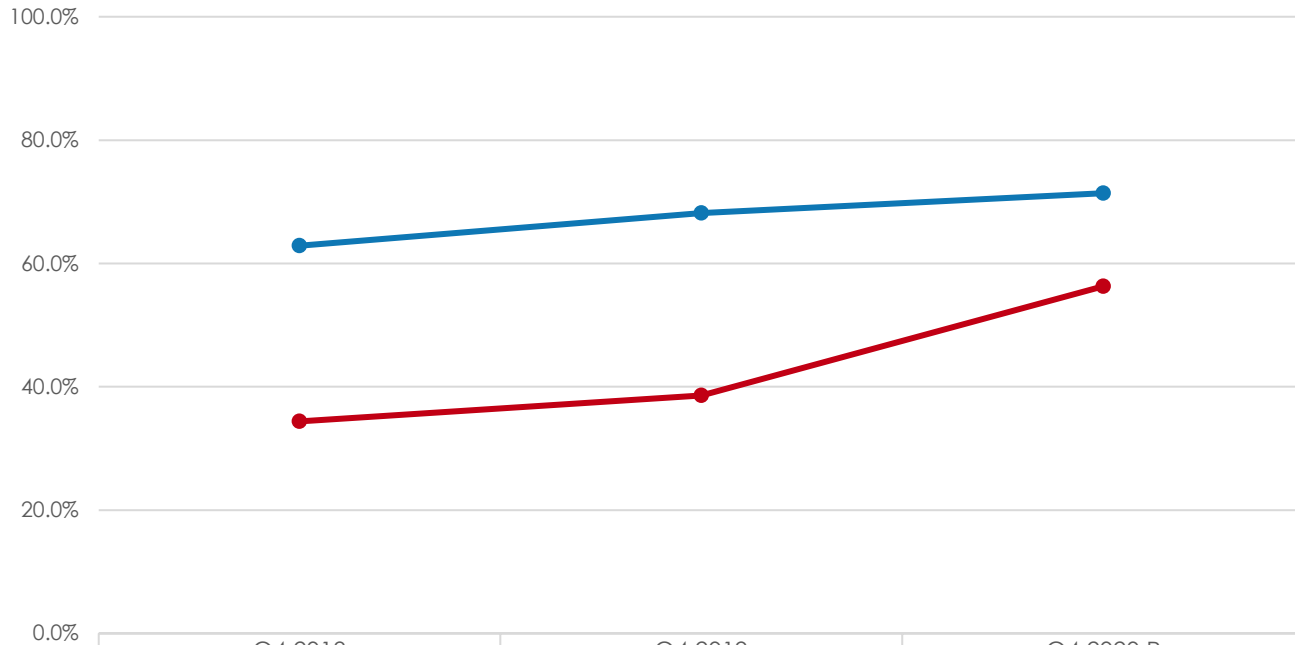


	U.S. West	U.S. East
■ Very likely (7-8)	71.4%	56.3%
■ Somewhat likely (5-6)	18.8%	26.8%
■ Somewhat unlikely (3-4)	5.2%	7.4%
■ Very unlikely (1-2)	3.1%	7.0%
■ Not sure	1.5%	2.5%
BASE	1,239	446
▲ MEAN	7.00	6.41



# LIKELIHOOD OF RETURN VISIT – KAUA‘I

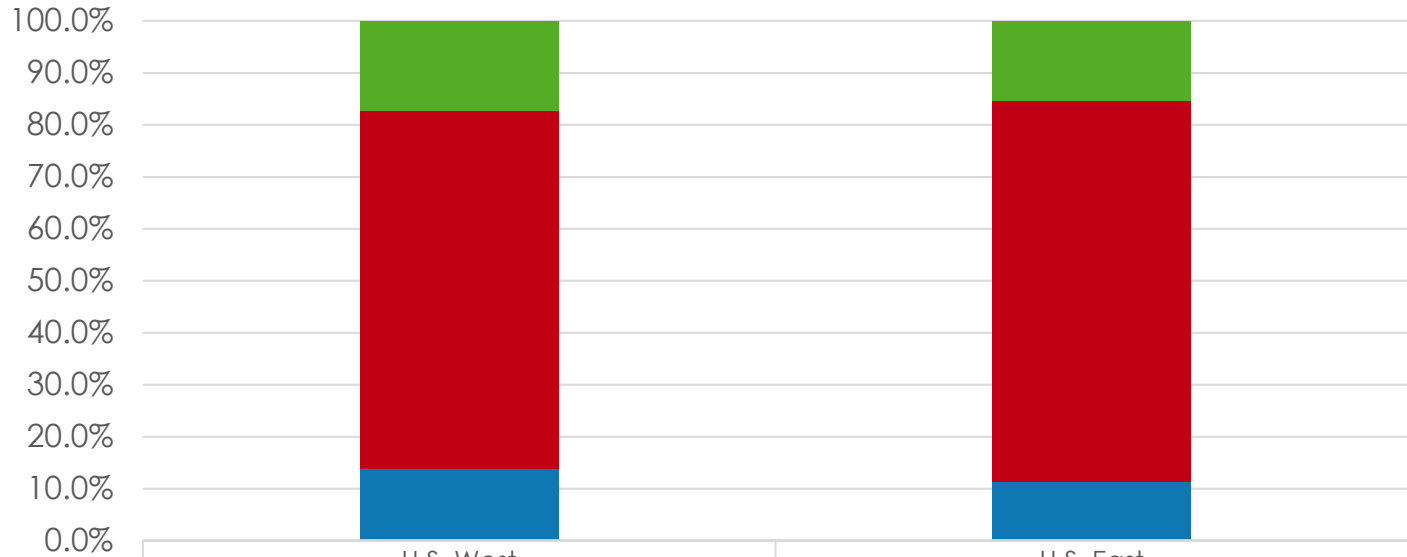
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020 P
U.S. West	62.9%	68.2%	71.4%
U.S. East	34.4%	38.6%	56.3%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East
■ Aided Ad Awareness	17.2%	15.4%
■ No Prior Awareness	69.0%	73.2%
■ Unsure	13.8%	11.4%
BASE	1,239	446

# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
<b>Fern Grotto</b>	5.7%	6.2%
<b>Hanalei Town</b>	62.0%	59.1%
<b>Hanalei Beach</b>	58.4%	64.2%
<b>Kalalau Trail</b>	20.9%	29.2%
<b>Kalapaki Beach</b>	29.8%	31.9%
<b>Bike Path in Kapaa</b>	11.3%	11.8%
<b>Kaua‘i Museum</b>	1.1%	2.1%
<b>Ke'e Beach</b>	20.5%	25.0%
<b>Kilauea Lighthouse</b>	28.4%	33.8%
<b>Koke'e</b>	12.4%	14.5%

## ATTRACTIONS – KAUA‘I (cont.)

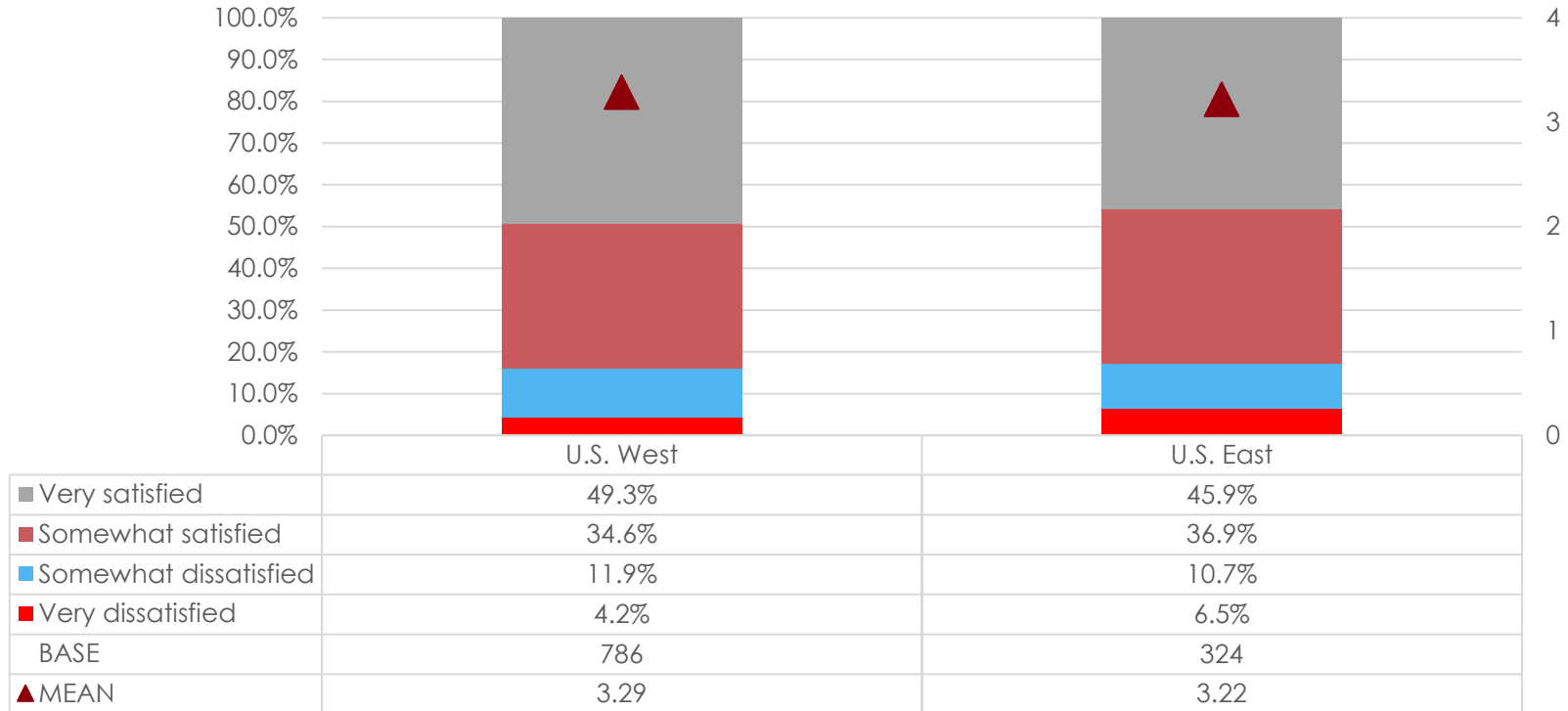
	U.S. West	U.S. East
<b>Koke‘e Museum</b>	1.6%	3.0%
<b>Na Aina Kai Gardens</b>	1.9%	3.2%
<b>Napali Coast</b>	39.5%	50.4%
<b>Allerton Garden</b>	5.8%	8.9%
<b>Limahuli Garden</b>	5.4%	6.6%
<b>Old Koloa Town</b>	40.1%	33.7%
<b>Opaeka‘a Falls</b>	27.6%	35.5%
<b>Po‘ipu Beach</b>	75.6%	66.7%
<b>Smith's Tropical Paradise Gardens</b>	3.0%	3.5%
<b>Spouting Horn</b>	41.3%	34.8%
<b>Wailua Falls</b>	39.6%	48.9%

## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	23.0%	21.3%
Waimea Canyon	55.9%	62.7%
Disc Golf	0.6%	0.5%
Mini Golf	2.3%	2.3%

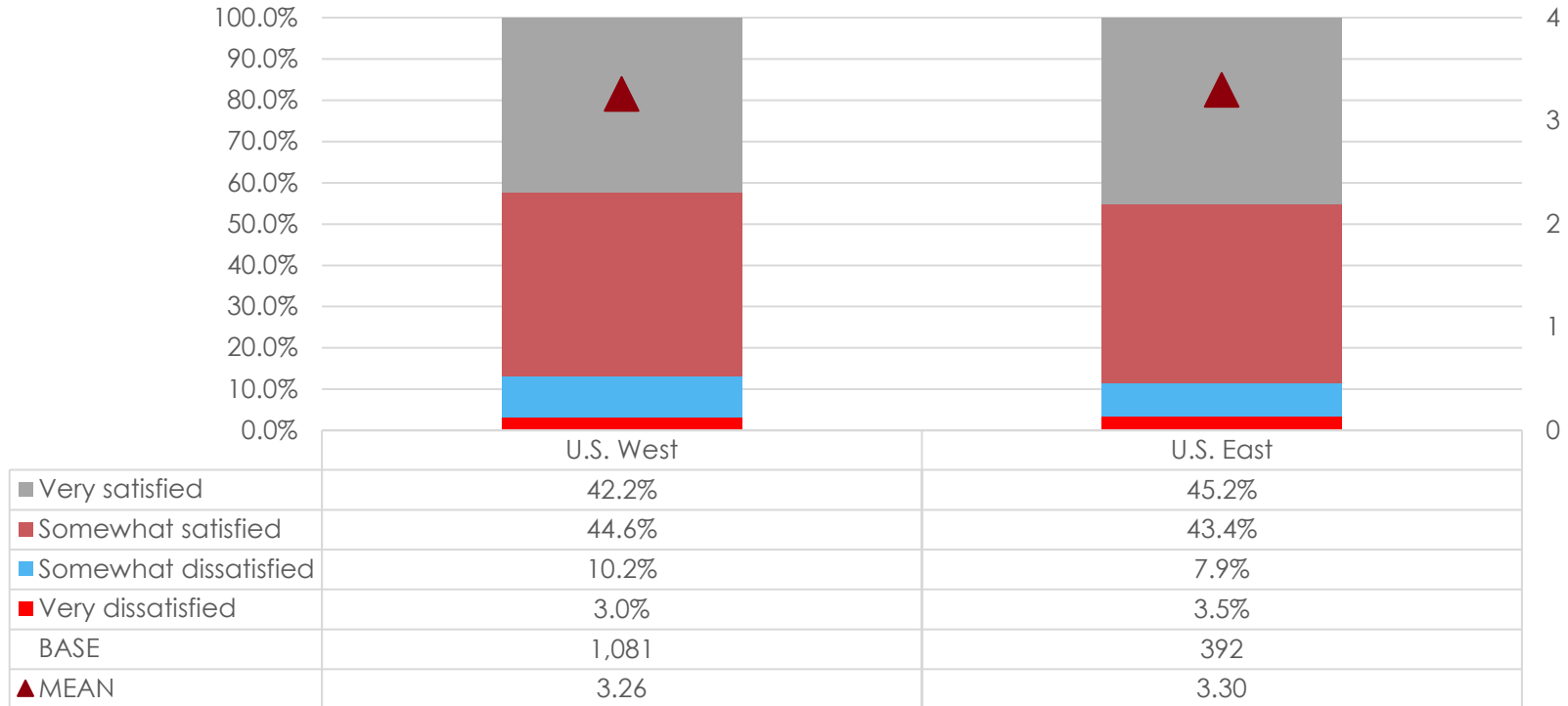
# SATISFACTION – ENTERTAINMENT

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



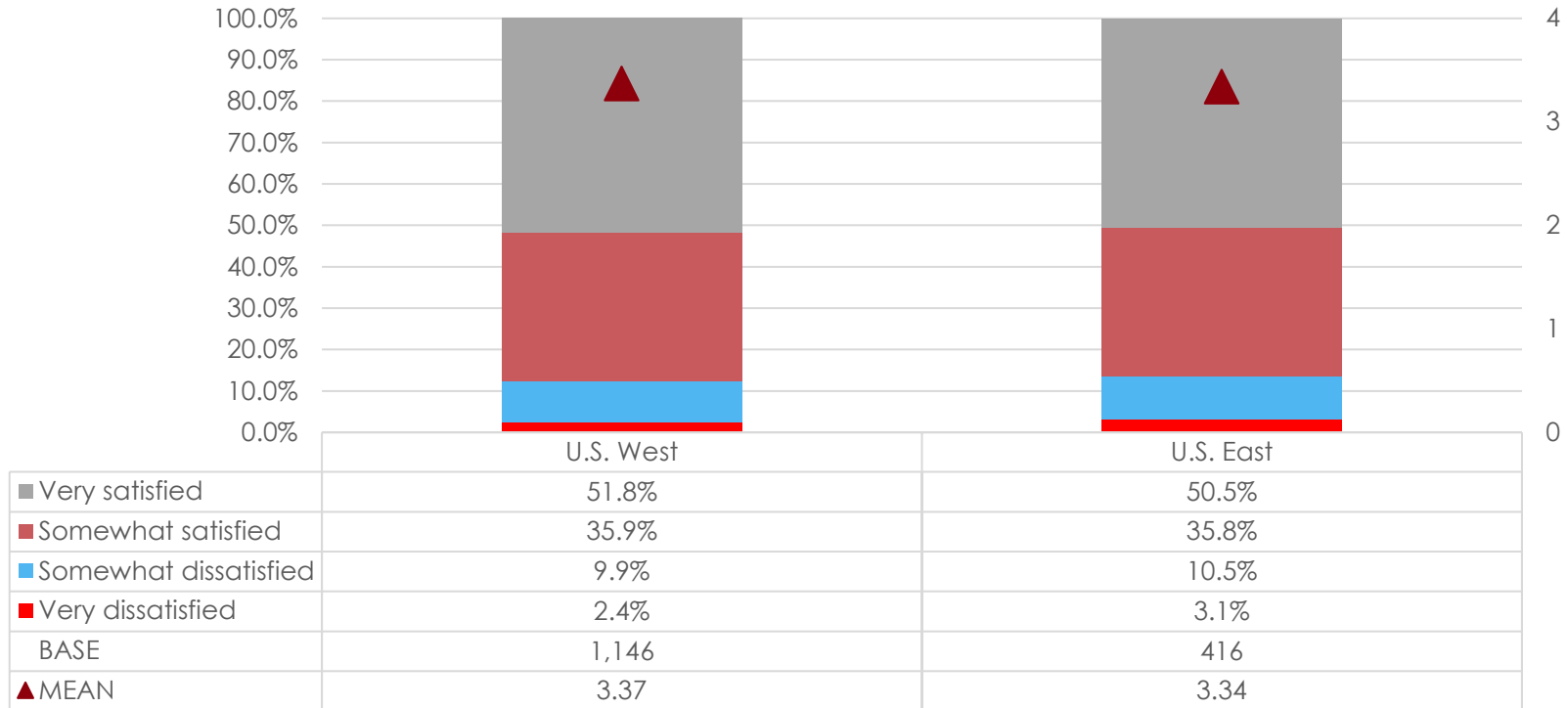
# SATISFACTION – SHOPPING

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



# SATISFACTION – DINING

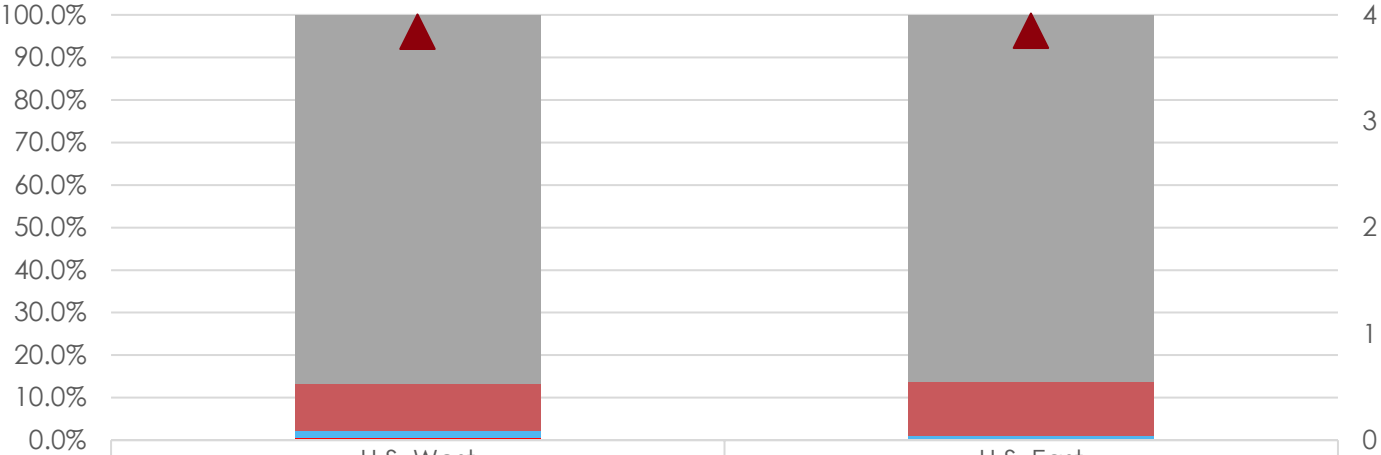
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied





# SATISFACTION – BEACHES

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

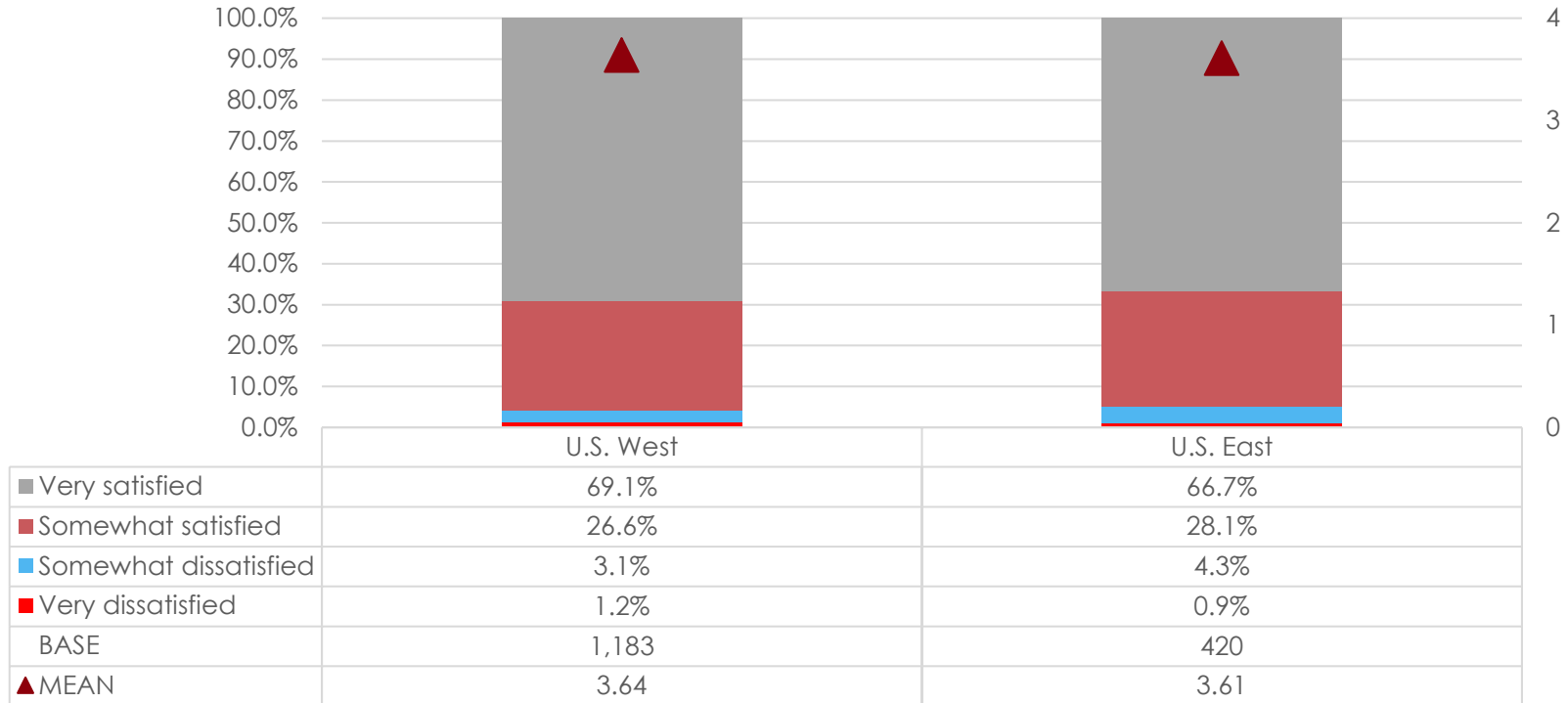


	U.S. West	U.S. East
■ Very satisfied	86.7%	86.2%
■ Somewhat satisfied	11.1%	12.9%
■ Somewhat dissatisfied	1.5%	0.7%
■ Very dissatisfied	0.7%	0.2%
BASE	1,204	427
▲ MEAN	3.84	3.85



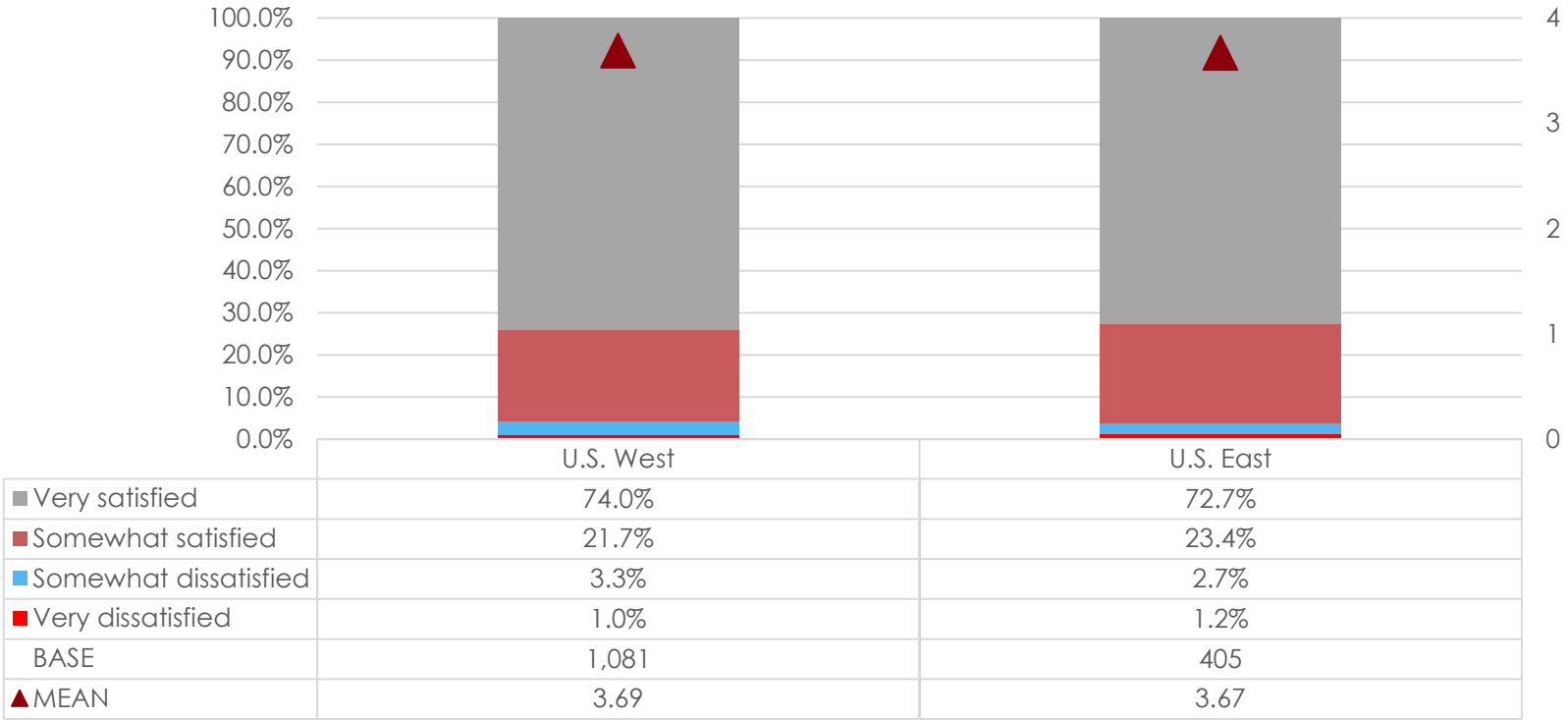
# SATISFACTION – PUBLIC AREAS

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



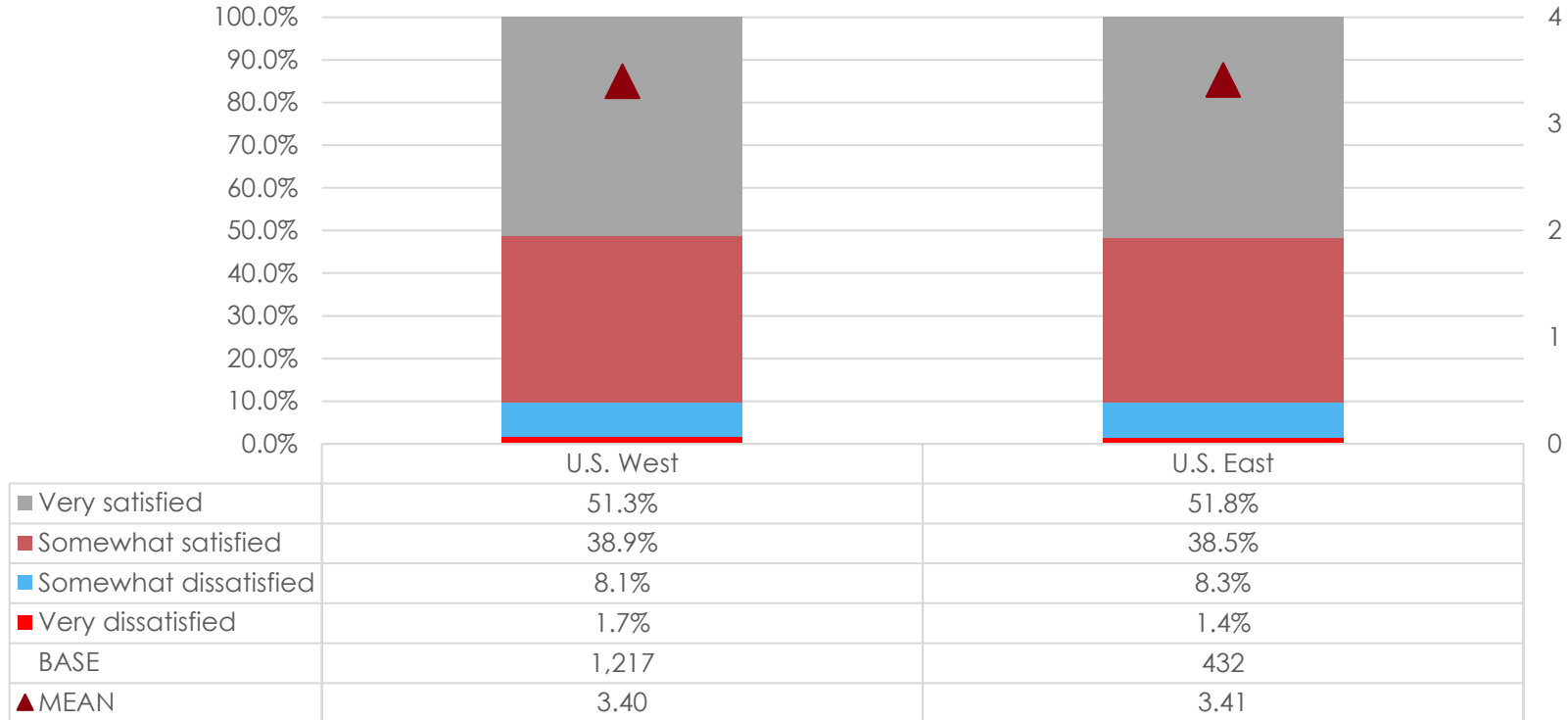
# SATISFACTION – PARKS

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



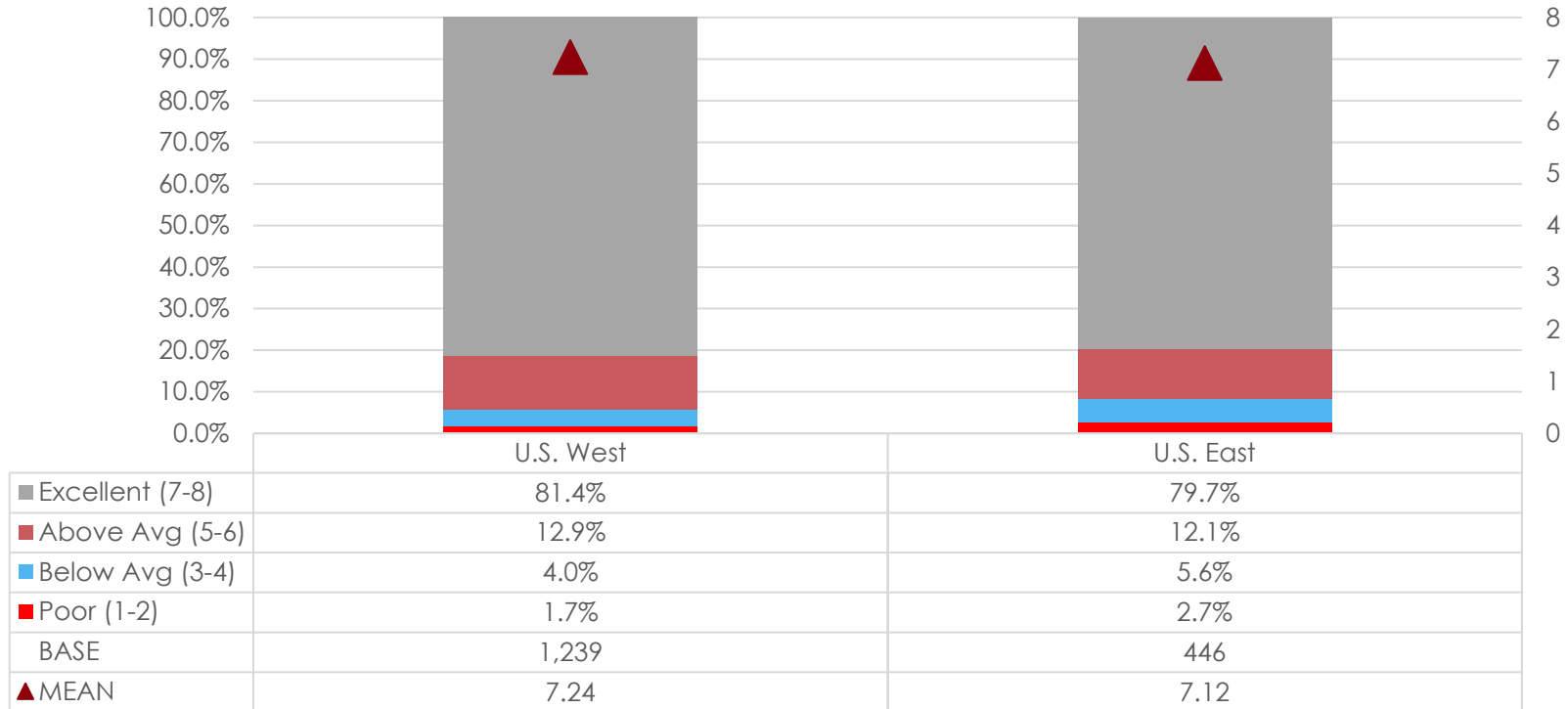
# SATISFACTION – ROADS

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



# FRIENDLINESS OF KAUA'I RESIDENTS

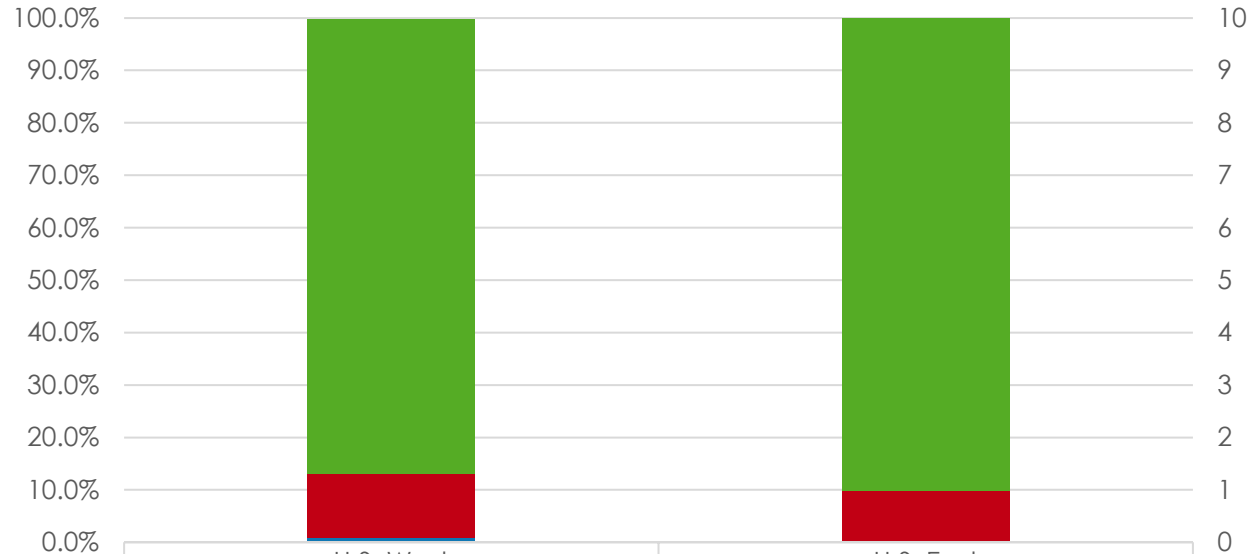
8-pt Rating Scale  
8=Excellent / 1=Poor



# TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
Been here before	51.8%	32.9%
Friend s recommendation	24.5%	32.6%
Visiting family/ friends	3.9%	5.6%
Own timeshare	3.1%	2.5%
Article/ blog	2.0%	3.8%
Wanted to visit	2.4%	2.0%

# SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	86.7%	90.2%
■ Full-face snorkel mask	12.2%	9.8%
■ Goggles only	0.8%	
BASE	634	205

# SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	97.9%	98.1%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	0.9%	1.0%
<b>Yes, needed assistance using full face snorkel mask</b>	0.3%	0.5%
<b>Yes, needed assistance other ocean activity</b>	0.9%	0.5%
<b>BASE</b>	634	205

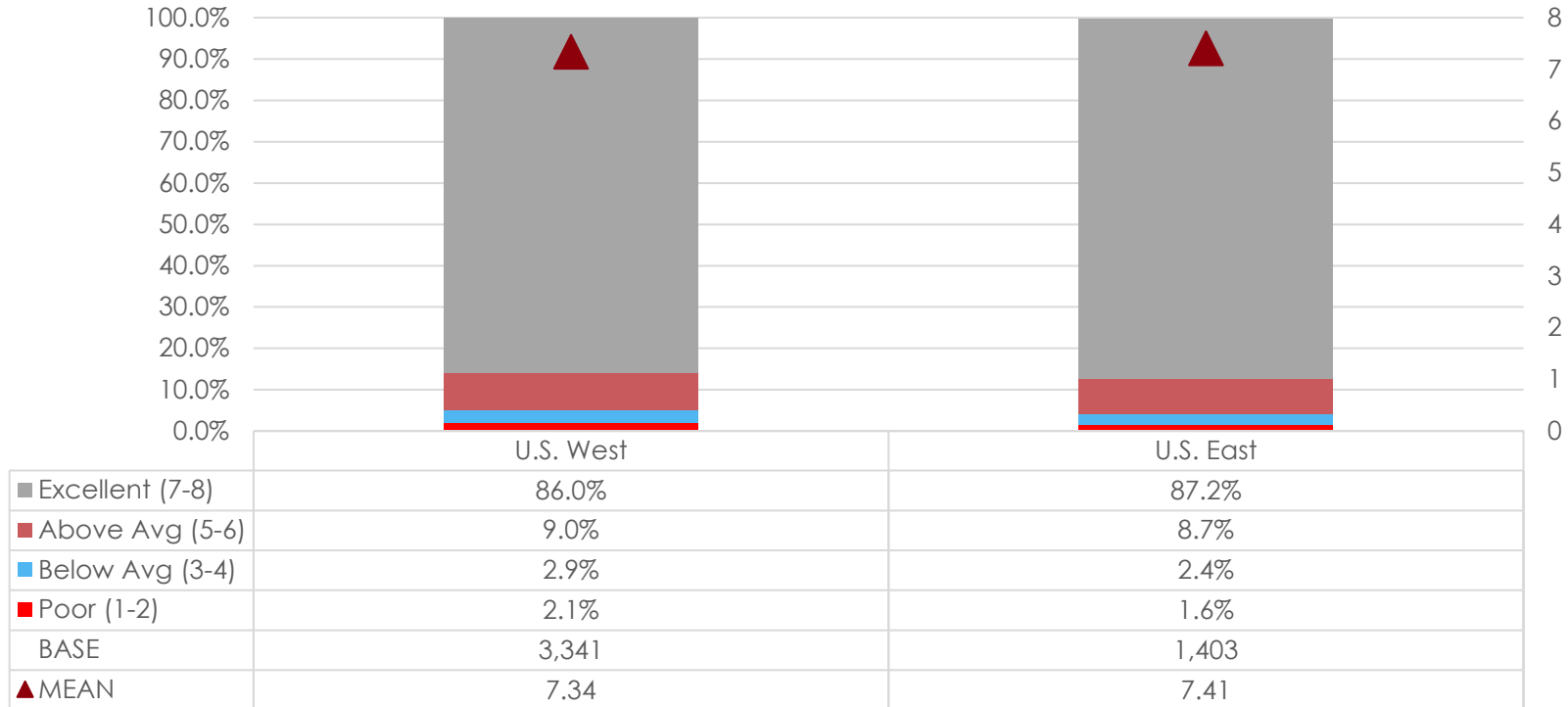


# Section 6

## ISLAND OF MAUI

# SATISFACTION – MAUI

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

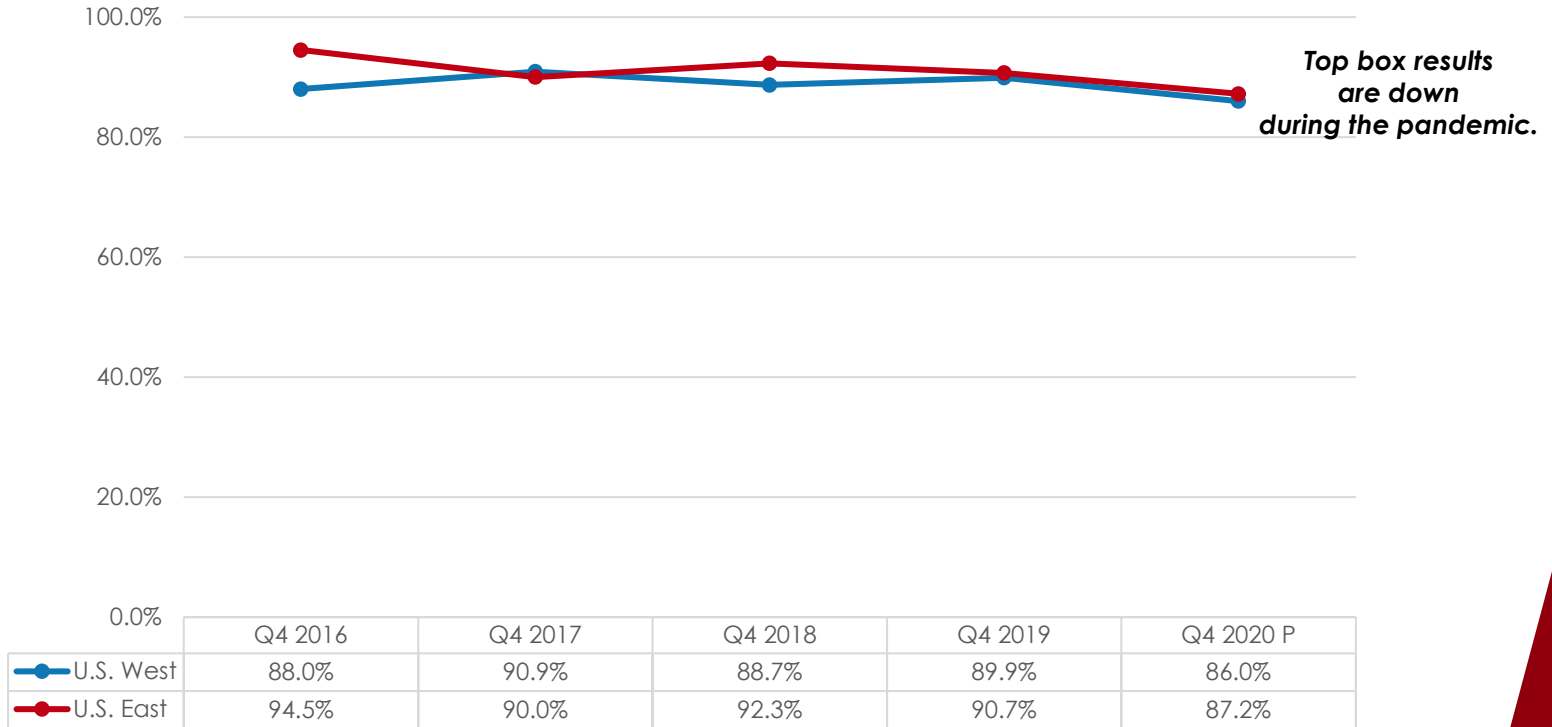


# SATISFACTION – MAUI

- **Gender:** Among U.S. West and U.S. East visitors, a higher percentage of females rated their stay on Maui as excellent compared to male visitors.
- **Age:** Visitors from both U.S. West and U.S. East under the age of 50 were more satisfied with their stay on Maui compared to those 50 years and older.
- **Islands visited:** Visitors from U.S. West and U.S. East whose entire trip was spent exclusively on Maui were more satisfied with the island compared to those who visited multiple islands.

# SATISFACTION – MAUI

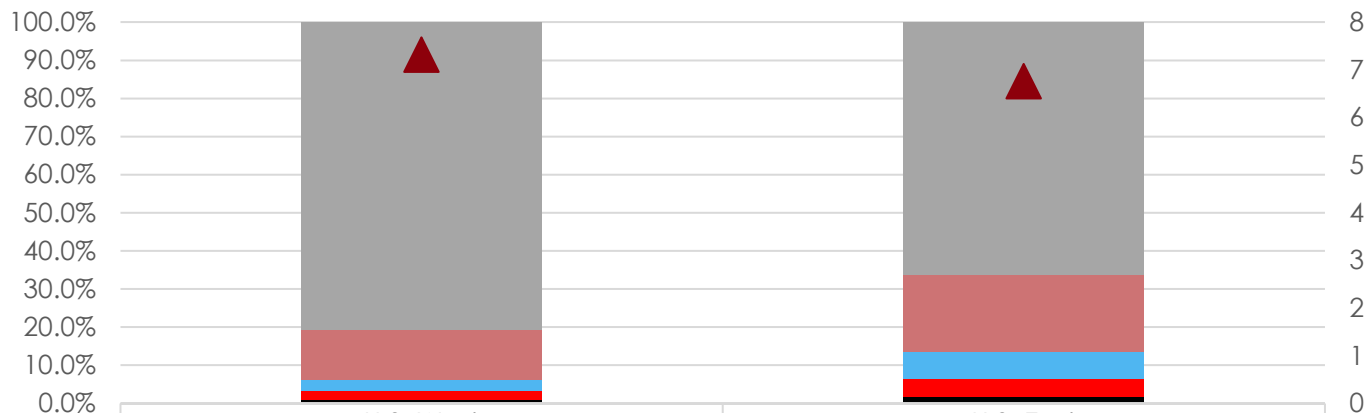
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – MAUI

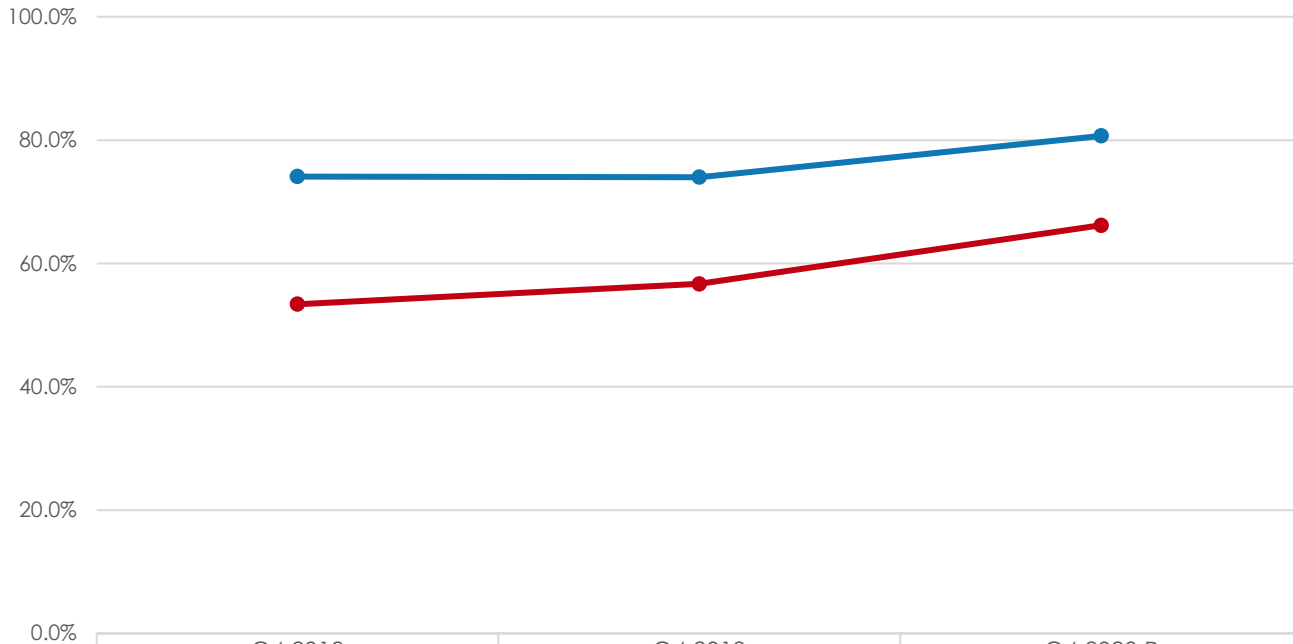
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	80.7%	66.2%
Somewhat likely (5-6)	13.3%	20.2%
Somewhat unlikely (3-4)	2.8%	6.9%
Very unlikely (1-2)	2.4%	4.9%
Not sure	0.9%	1.7%
BASE	3287	1350
MEAN	7.32	6.76

# LIKELIHOOD OF RETURN VISIT – MAUI

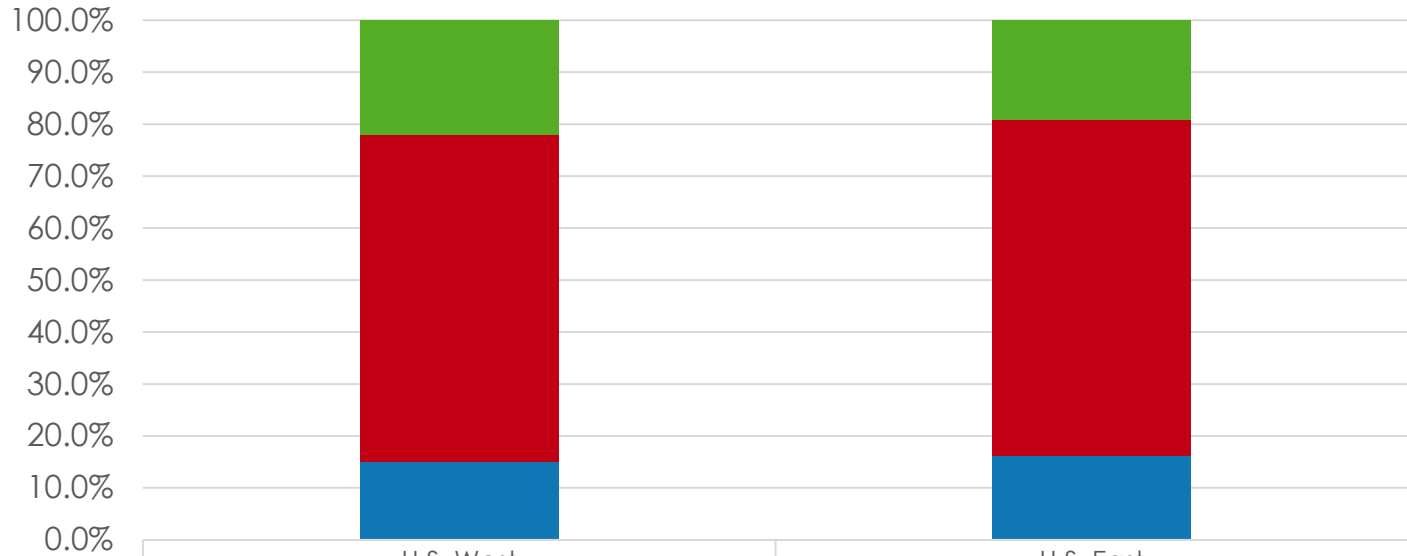
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020 P
U.S. West	74.1%	74.0%	80.7%
U.S. East	53.4%	56.7%	66.2%

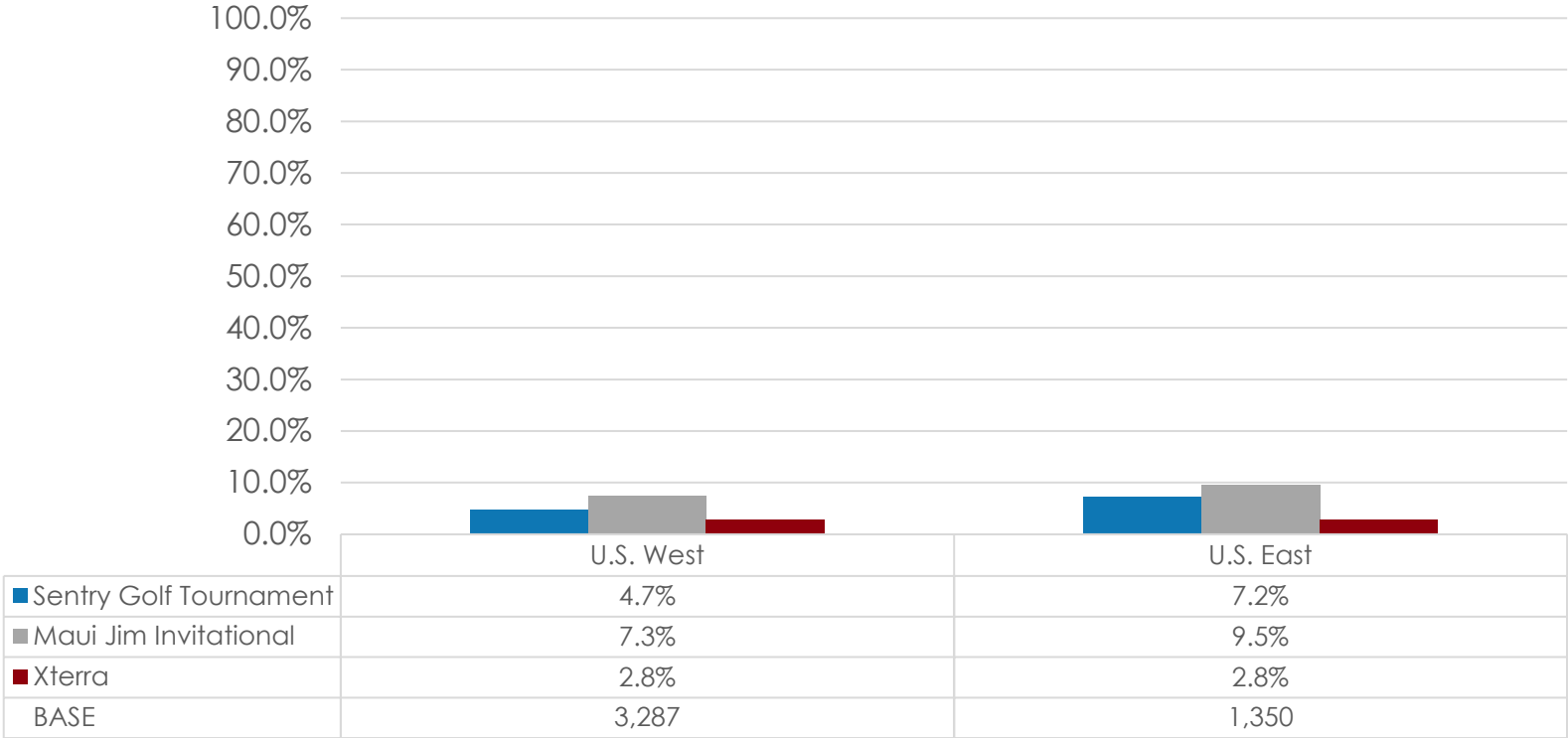
P= Preliminary Data

# AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	22.1%	19.2%
■ No Prior Awareness	62.8%	64.6%
■ Unsure	15.1%	16.2%
BASE	3,287	1,350

# AIDED ADVERTISING AWARENESS – MAUI EVENTS





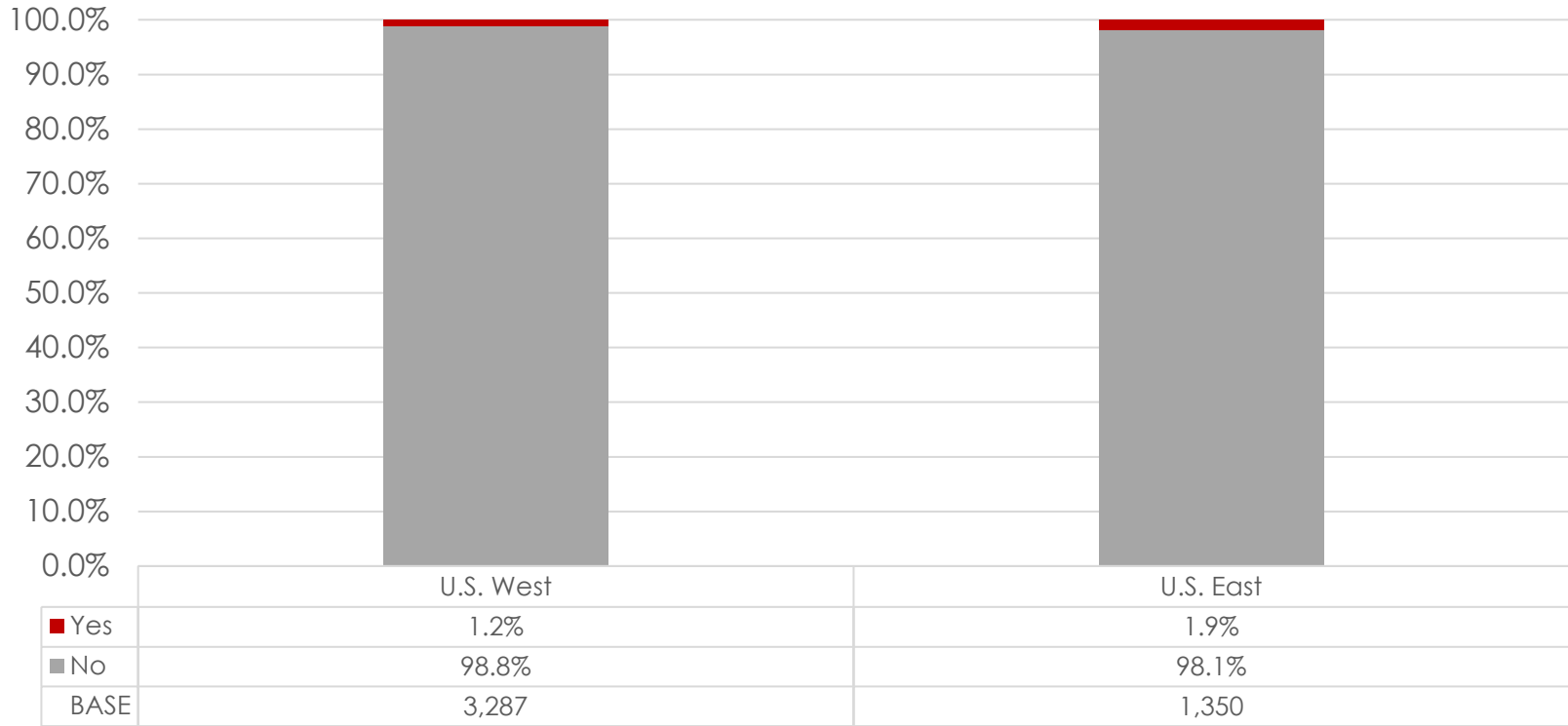
# MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
<b>Outdoor or sporting activities and events</b>	21.6%	24.8%
<b>Hawaiian cultural events</b>	7.9%	13.3%
<b>Social media posts and videos</b>	8.2%	12.5%
<b>Hawaiian Music</b>	5.9%	6.7%
<b>TV programs/ Movies filmed in Hawai'i</b>	4.2%	8.0%
<b>None of these</b>	69.0%	60.8%

# ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	0.8%	0.6%
Aquarium Maui /Maui Ocean Center	1.1%	2.7%
Baldwin Missionary Home Museum	1.9%	1.1%
Hale Pa'i Printing House	0.1%	0.1%
Haleakala National Park	29.7%	49.9%
Haleki'i Pihana Heiau State Monument	1.7%	3.0%
Hana Cultural Center	5.0%	9.8%
'Iao Valley State Monument	10.3%	13.5%
Kepaniwai Park & Heritage Gardens	2.6%	5.9%
Kula Botanical Garden	4.6%	7.7%
Maui Historical Society Bailey House Museum	0.6%	0.7%
Whaler's Village Museum	6.4%	8.5%
Wo Hing Temple Museum	0.4%	1.0%

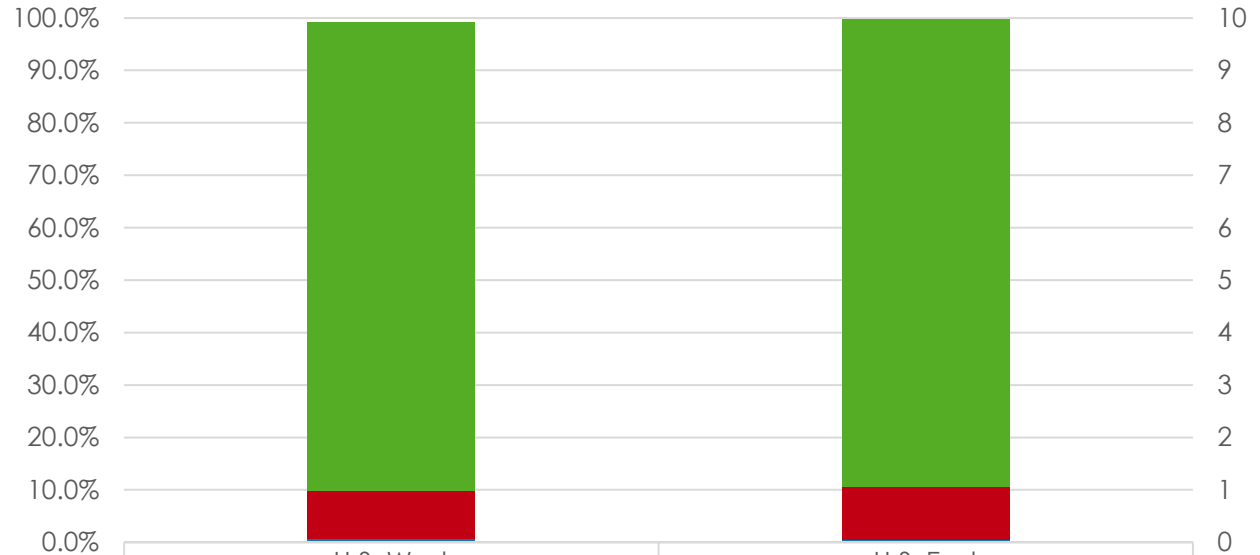
# VISITED MAUI FOR SPECIFIC EVENT



## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Wedding/ honeymoon/ Anniversary/ Birthday/ Funeral	51.5%	46.0%
Convention/ meeting/ conference/ workshop	17.0%	7.6%
Other sporting event	14.5%	7.6%
Maui Jim Invitational	4.8%	19.3%
BASE	41	26

# SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	89.3%	89.2%
■ Full-face snorkel mask	9.2%	10.0%
■ Other	0.6%	0.5%
BASE	2,074	820

# SNORKELING OCEAN SAFETY – MAUI

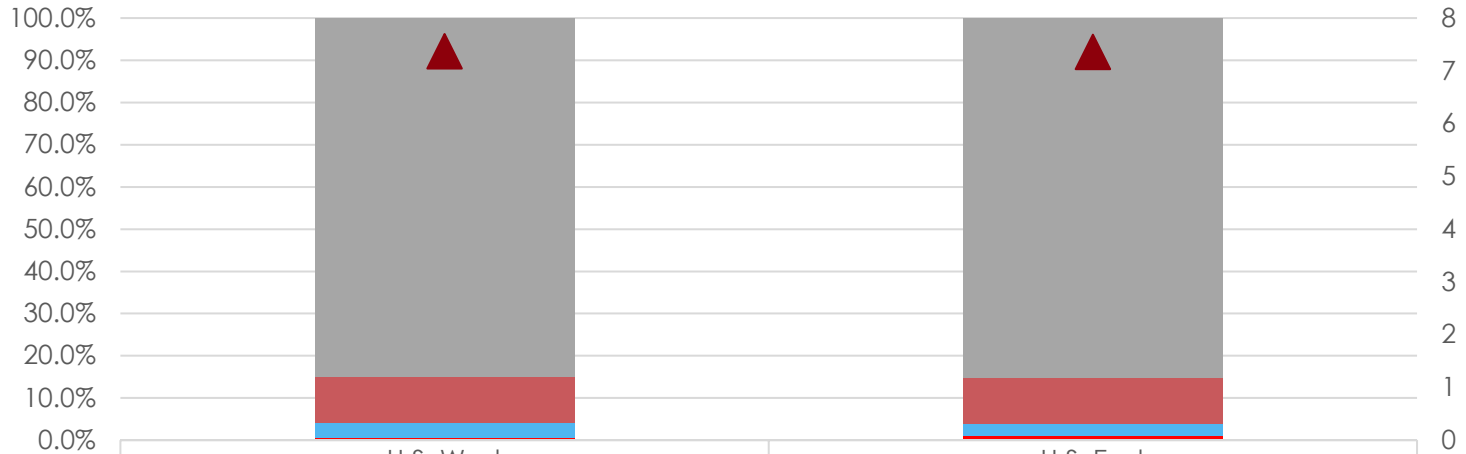
	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	99.0%	97.4%
<b>Yes needed assistance two piece mask &amp; snorkel</b>	0.6%	1.6%
<b>Yes, needed assistance full snorkel facemask</b>	0.1%	0.2%
<b>Yes, needed assistance other ocean activity</b>	0.3%	0.7%
<b>BASE</b>	2,074	820

# Section 7

## ISLAND OF HAWAI'I

# SATISFACTION – ISLAND OF HAWAI‘I

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



	U.S. West	U.S. East
■ Excellent (7-8)	85.0%	85.1%
■ Above Avg (5-6)	11.0%	11.0%
■ Below Avg (3-4)	3.4%	2.8%
■ Poor (1-2)	0.6%	1.1%
BASE	1,464	564
▲ MEAN	7.37	7.36

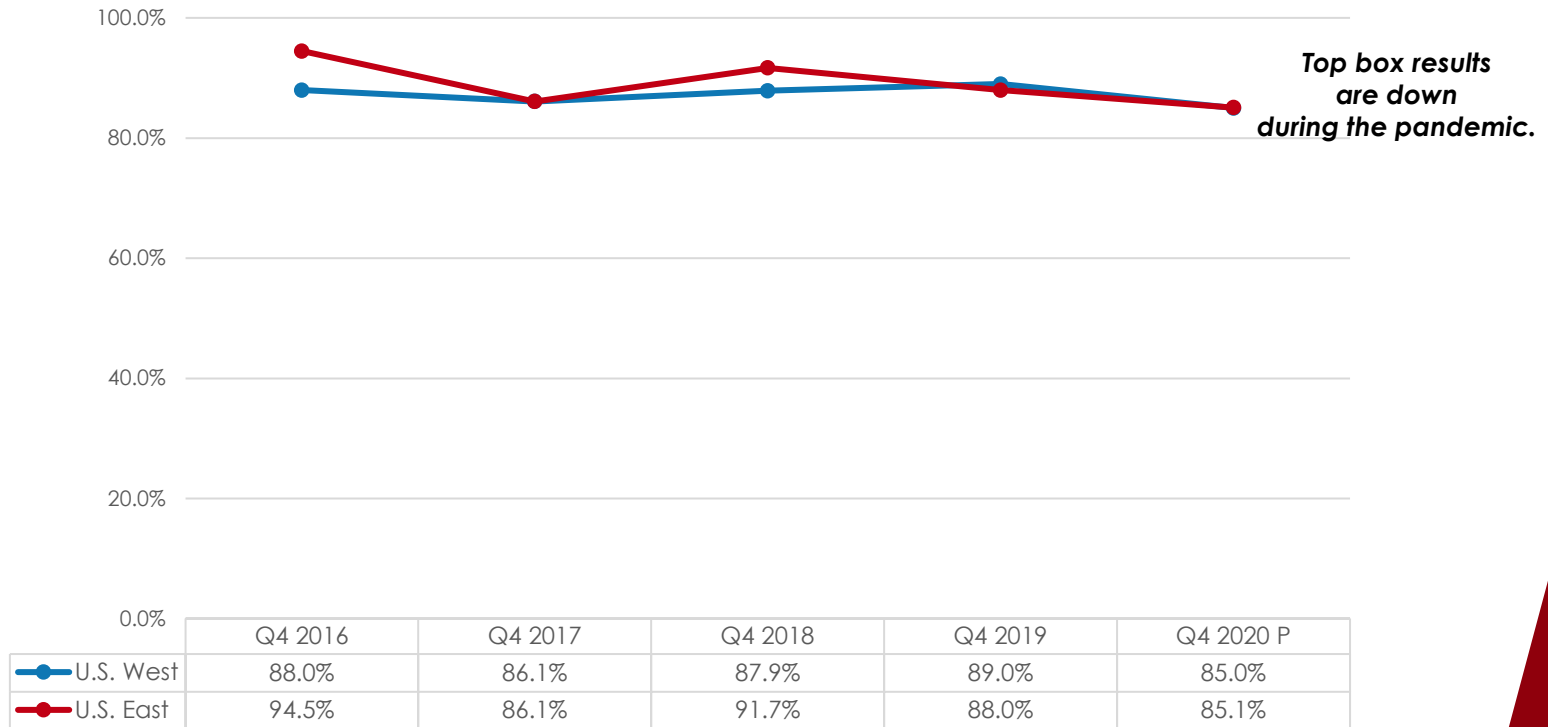


# SATISFACTION – ISLAND OF HAWAI'I

- **Gender:** Among U.S. West visitors, a higher percentage of females gave excellent ratings to the island of Hawai'i compared to their male counterpart.
- **Islands visited:** Visitors from U.S. West and U.S. East whose trip was spent entirely on the island of Hawai'i were more satisfied with the island, compared to those who visited multiple islands.

# SATISFACTION – ISLAND OF HAWAI‘I

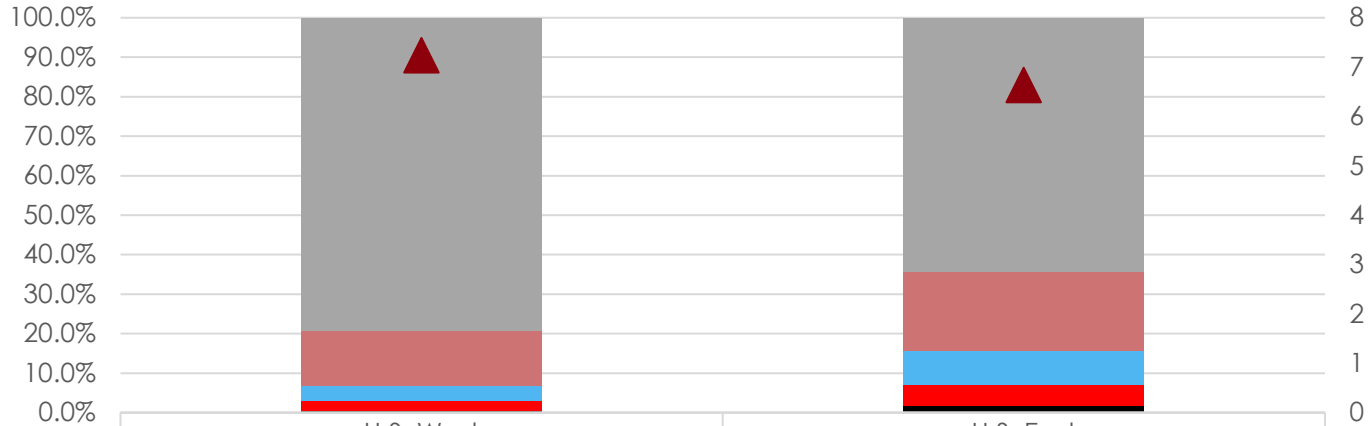
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

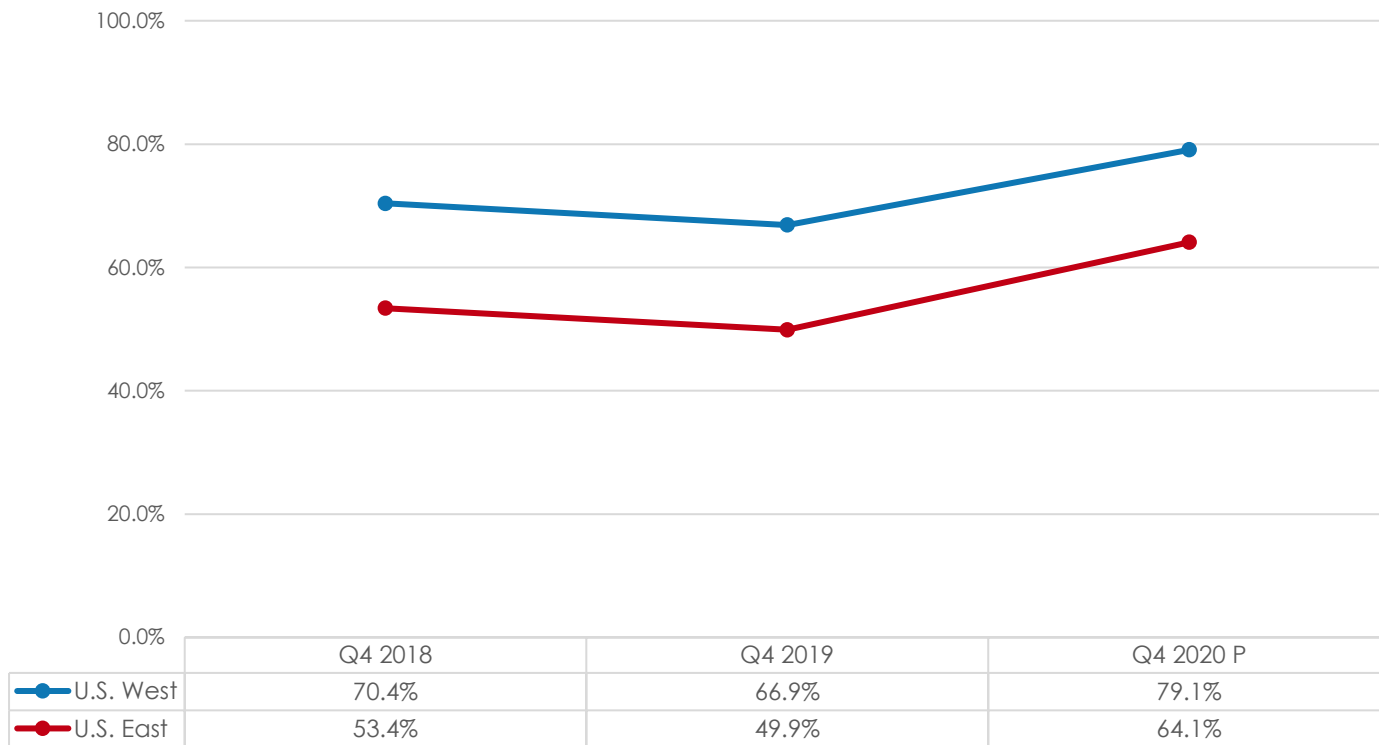
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	79.1%	64.1%
■ Somewhat likely (5-6)	14.0%	20.2%
■ Somewhat unlikely (3-4)	3.8%	8.5%
■ Very unlikely (1-2)	2.5%	5.3%
■ Not sure	0.5%	1.8%
BASE	1,454	547
▲ MEAN	7.24	6.64

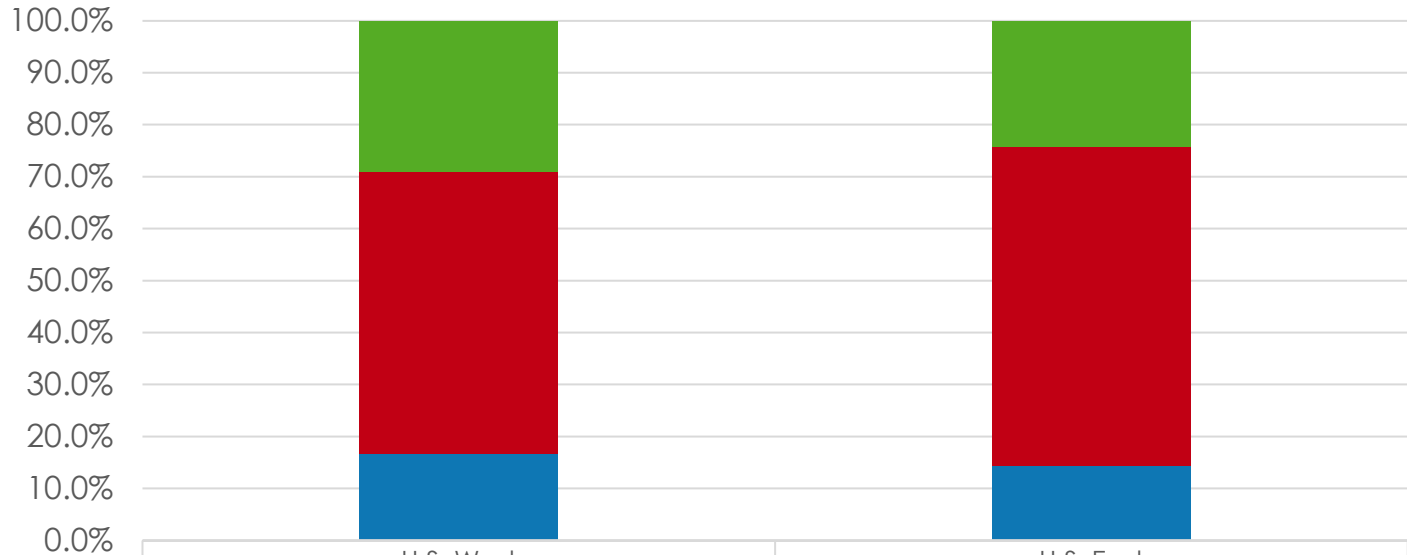
# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	29.0%	24.2%
■ No Prior Awareness	54.4%	61.5%
■ Unsure	16.6%	14.3%
BASE	1,454	547

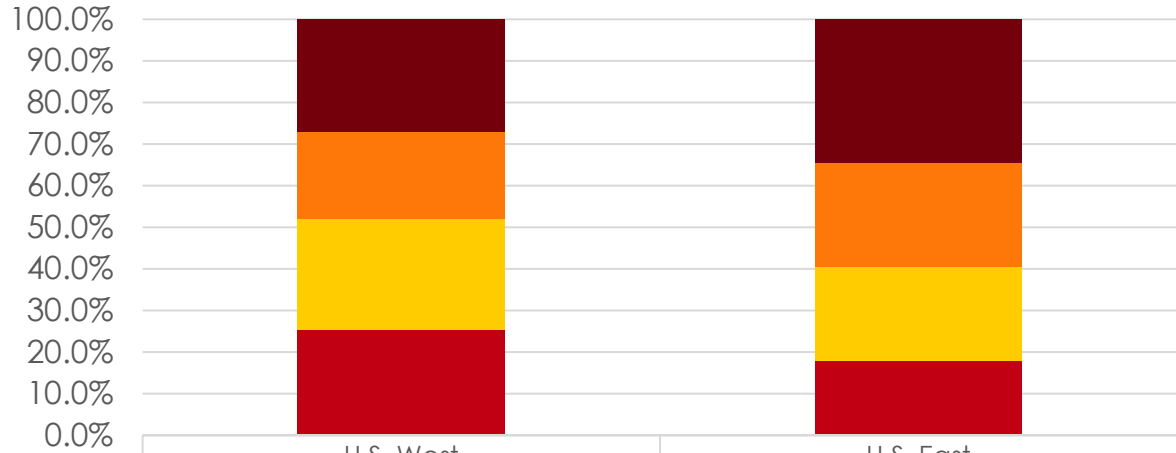
# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	26.8%	35.6%
Botanical Gardens	8.7%	8.7%
H.N. Greenwell Store	2.2%	3.3%
Hawai'i Volcanoes National Park	42.9%	60.6%
Hilo Farmers Market	18.7%	22.4%
Hulihe'e Palace	2.7%	4.2%
'Imiloa Astronomy Ctr	0.9%	2.2%
Kaloko Honokohau National Historical Park	8.4%	13.8%
Kona Coffee Living History Farm	6.3%	9.4%
Lili'uokalani Park and Garden	7.0%	9.9%

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

	U.S. West	U.S. East
<b>Lyman House Memorial Museum</b>	0.9%	1.3%
<b>Maunakea</b>	17.3%	26.8%
<b>Orchid Farm</b>	2.0%	1.5%
<b>Pacific Tsunami Museum</b>	0.5%	0.9%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	1.4%	1.5%
<b>Pu'uuhonua o Honaunau National Historical Park</b>	18.6%	23.7%
<b>Pu'ukohola Heia National Historical Site</b>	8.4%	13.0%
<b>Punalu'u Black Sand Beach</b>	32.0%	45.3%
<b>Rainbow Falls</b>	24.3%	34.2%
<b>Volcano Art Center</b>	5.2%	6.4%

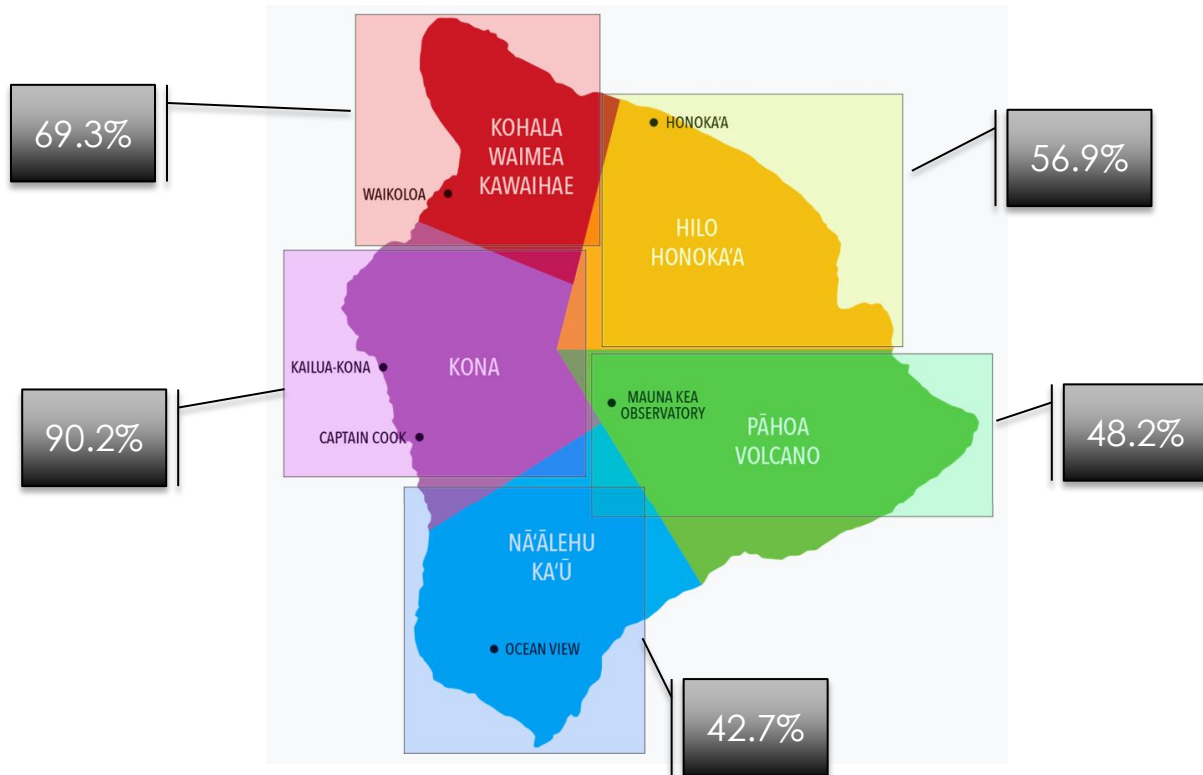
# TRAVEL ON ISLAND OF HAWAI'I



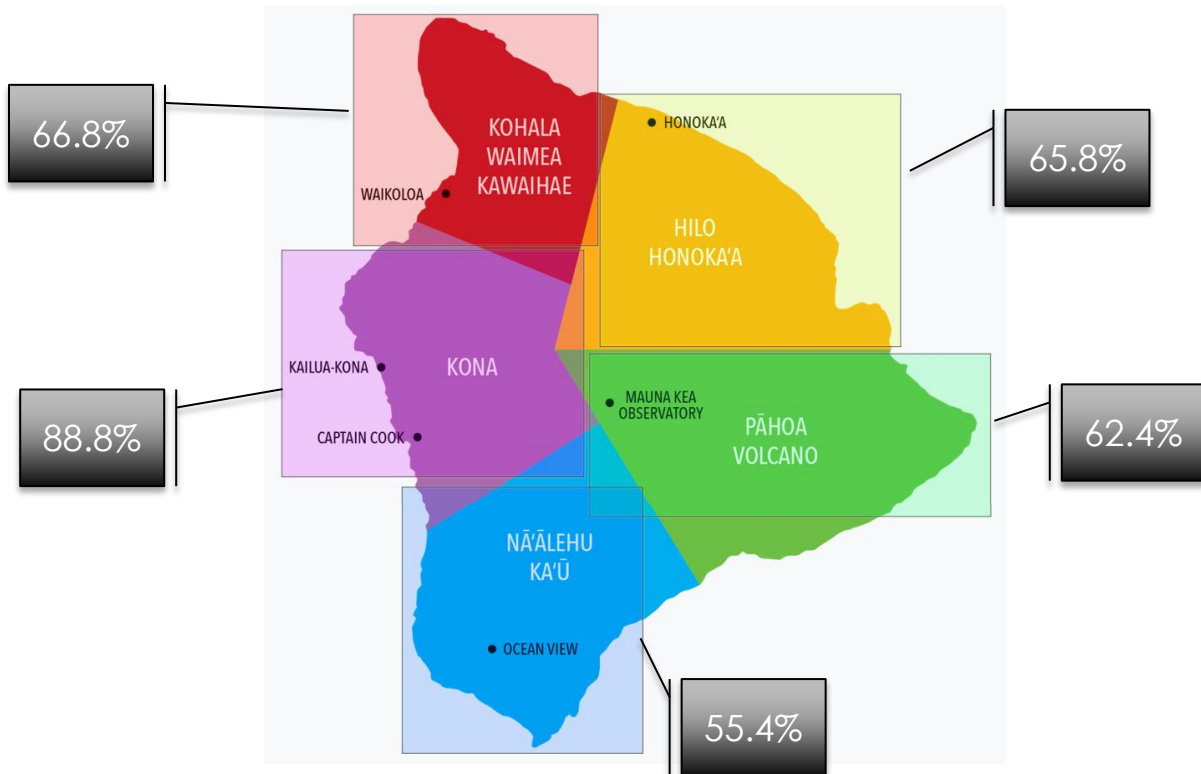
	U.S. West	U.S. East
■ Traveled to other side of island	27.0%	34.4%
■ Traveled more than 1 hour one way to reach activities	20.9%	25.2%
■ Traveled 1 hour or less one way to reach activity	26.9%	22.5%
■ Enjoy activities- short drive from accommodations	25.2%	17.9%
● BASE	1,454	547



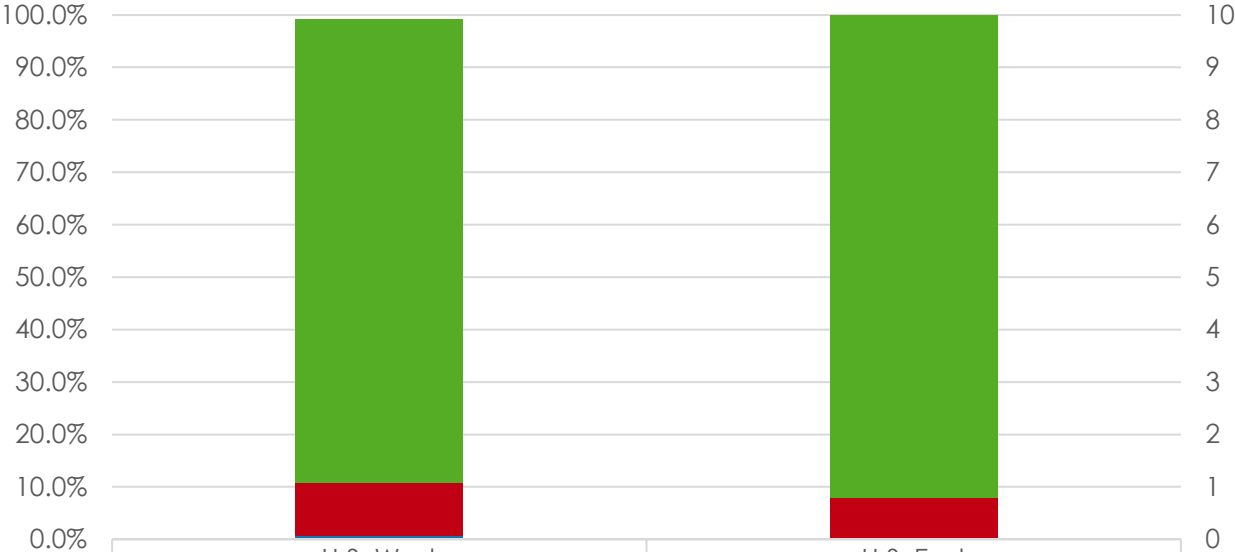
# AREAS VISITED U.S. WEST



# AREAS VISITED U.S. EAST



# SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	88.3%	92.1%
■ Full-face snorkel mask	10.2%	7.6%
■ Goggles only	0.7%	0.3%
BASE	873	301

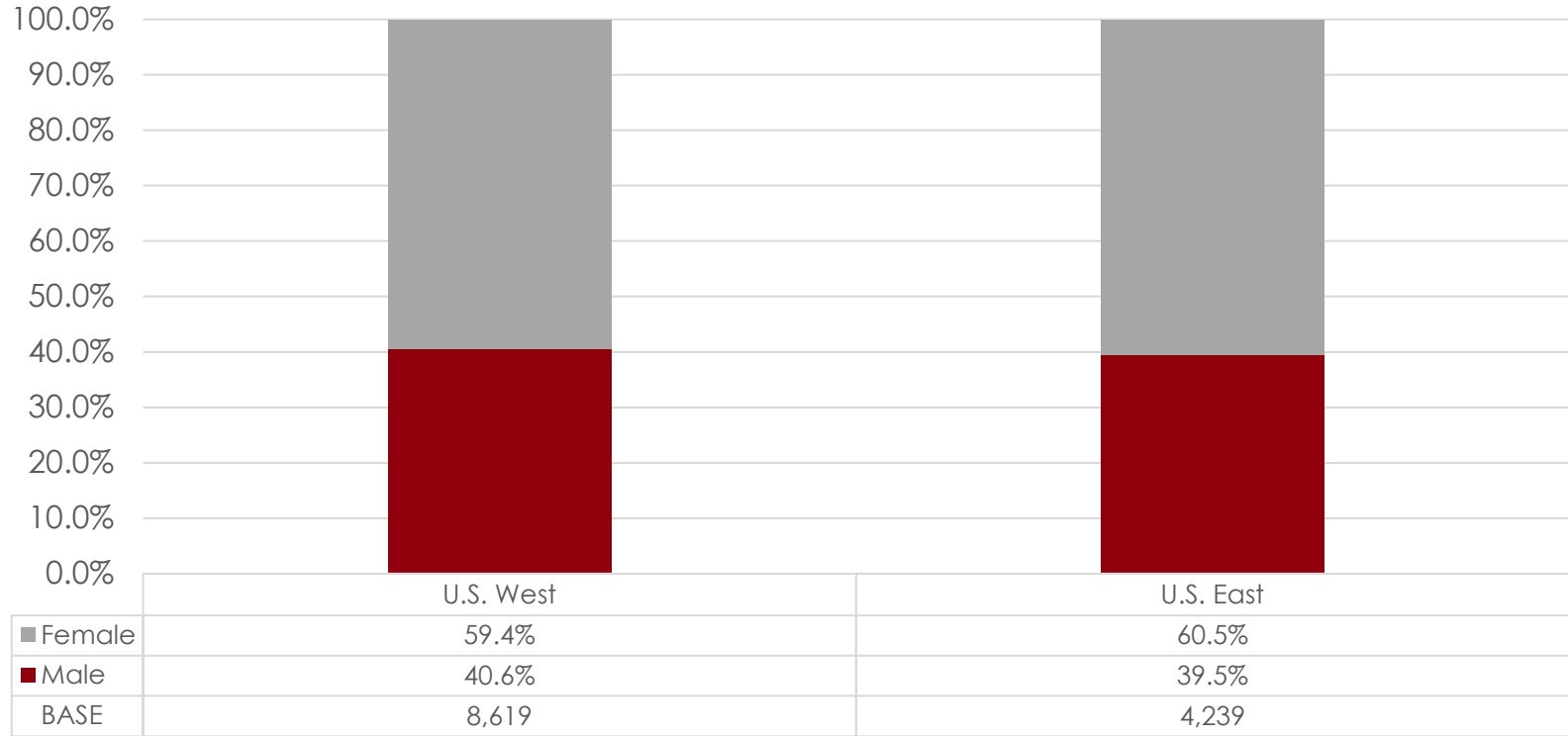
# SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	98.0%	98.3%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	1.2%	1.0%
<b>Yes, needed assistance using full face mask</b>	0.1%	-
<b>Yes, needed assistance other ocean activity</b>	0.7%	0.7%
<b>BASE</b>	873	301

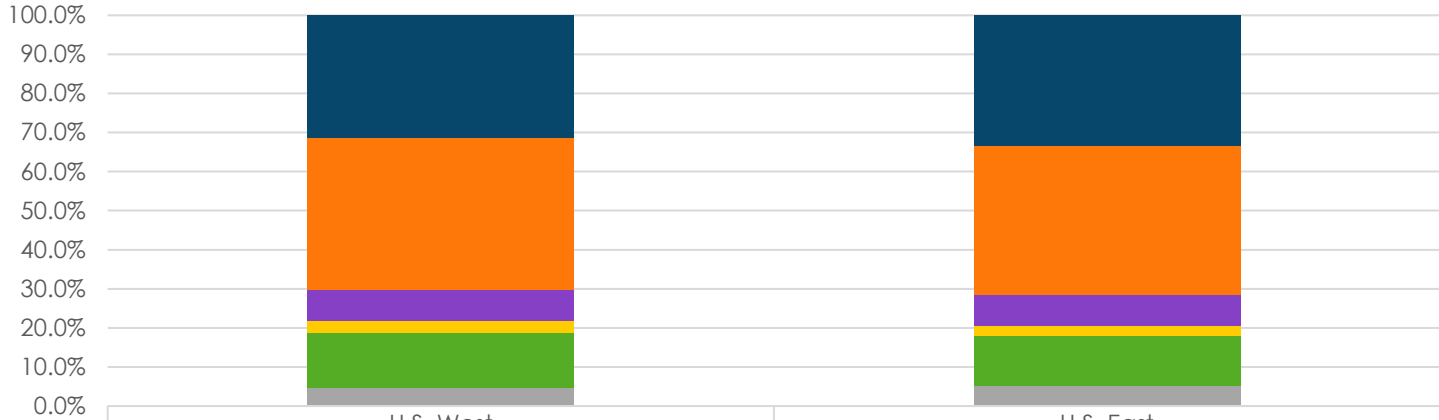
# Section 8

## VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION



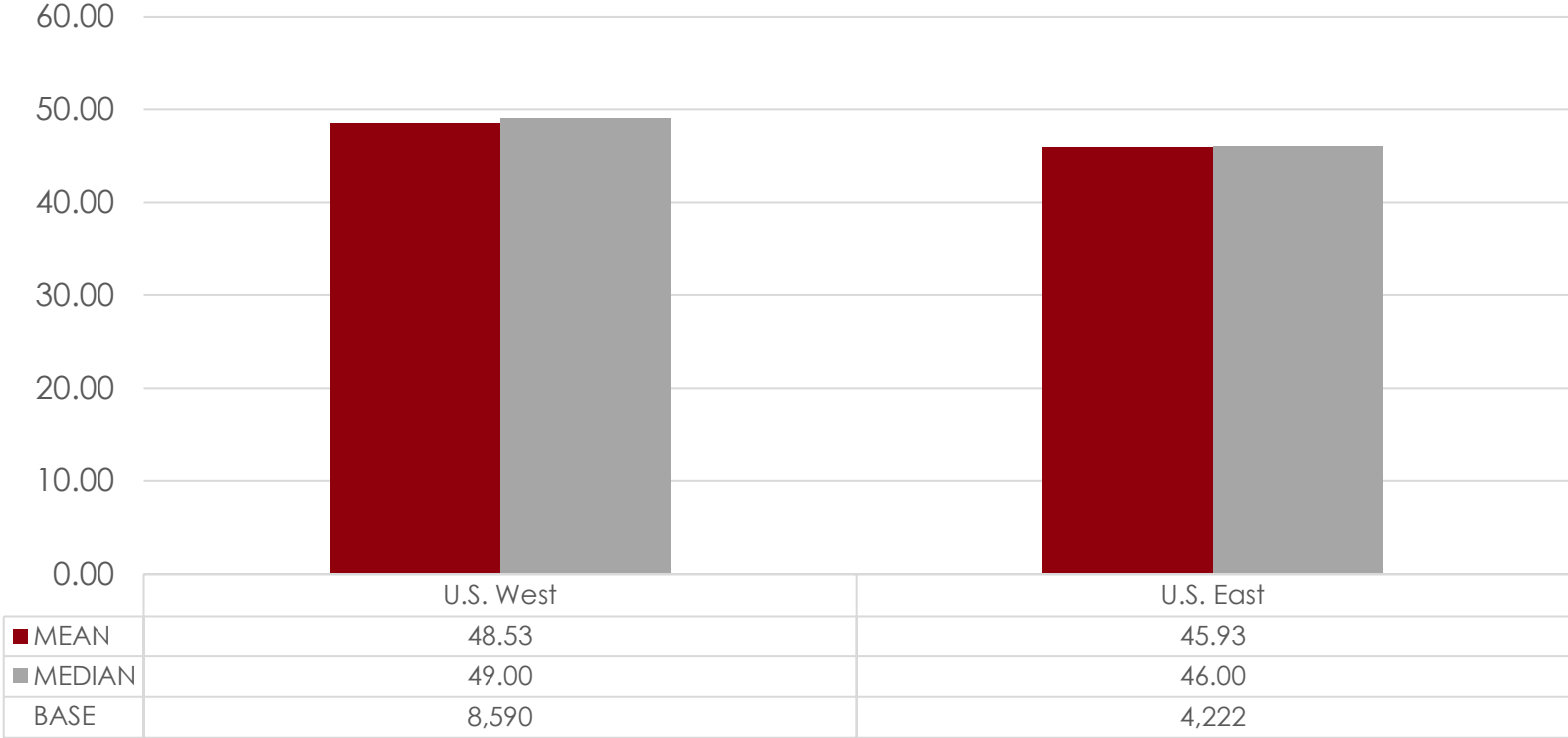
	U.S. West	U.S. East
■ Post-Graduate	31.4%	33.4%
■ College Grad	39.0%	38.0%
■ Associate Degree	7.9%	8.1%
■ Vocational/ Tech	3.1%	2.4%
■ Some College	14.0%	12.9%
■ H.S. Grad	4.4%	4.9%
■ Some / No H.S.	0.3%	0.3%
BASE	8,591	4,225

# VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

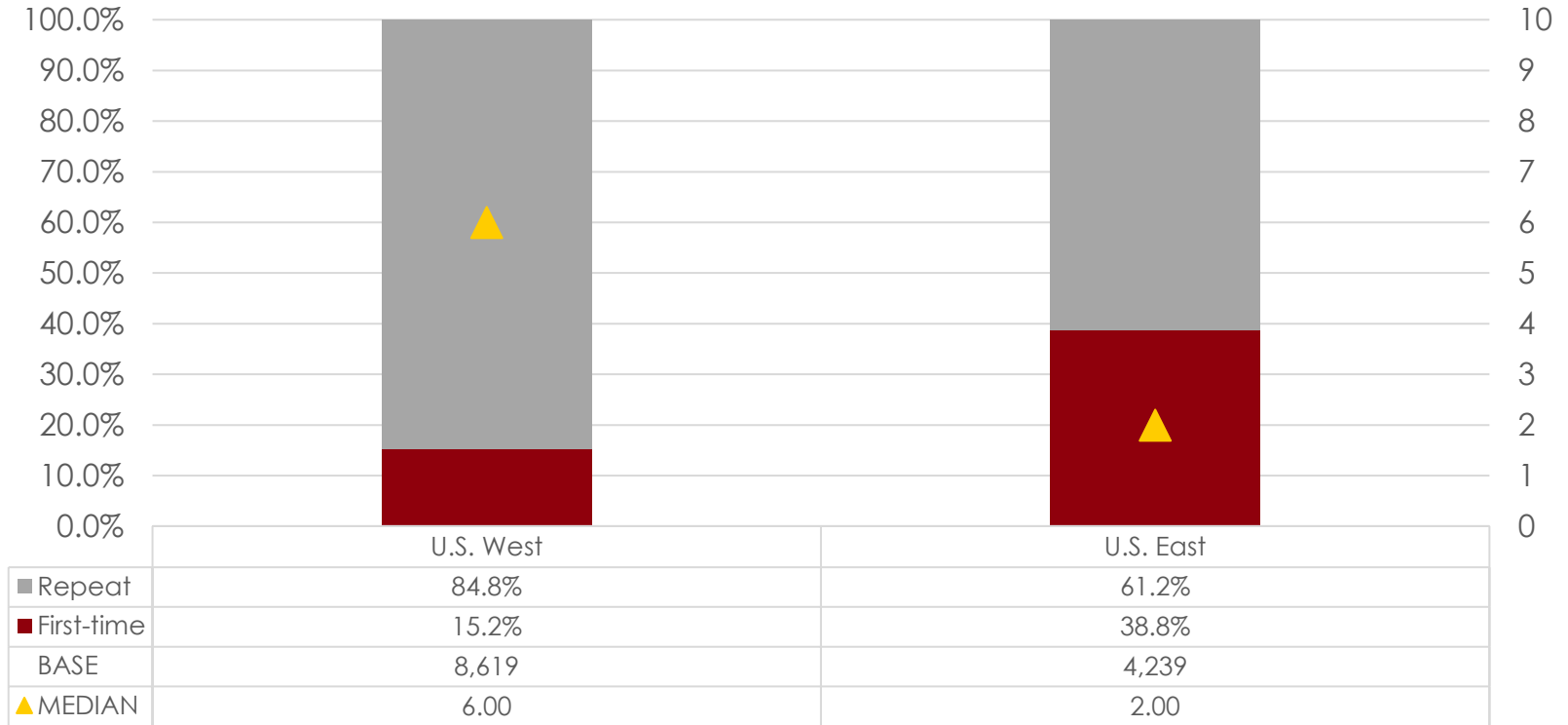
	U.S. West	U.S. East
< \$40,000	6.0%	8.2%
\$40,000 to \$59,999	6.0%	9.2%
\$60,000 to \$79,999	7.9%	9.9%
\$80,000 to \$99,999	8.3%	9.8%
\$100,000 to \$124,999	11.3%	12.0%
\$125,000 to \$149,999	10.5%	9.9%
\$150,000 to \$174,999	9.6%	9.2%
\$175,000 to \$199,999	7.4%	6.0%
\$200,000 to \$249,999	9.4%	8.0%
\$250,000 +	23.7%	17.9%



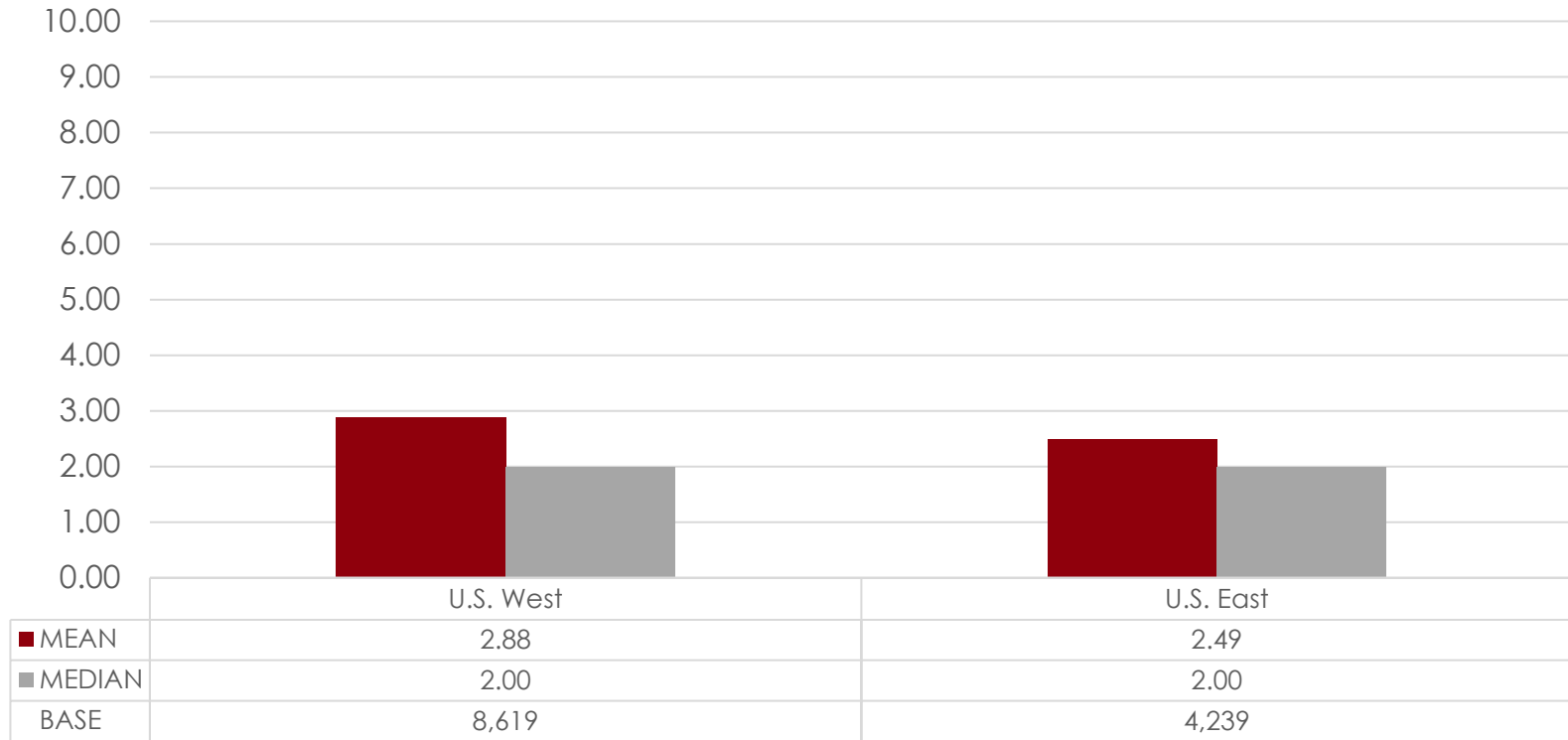
# VISITOR PROFILE – AGE



# VISITOR PROFILE – TRIPS TO HAWAI‘I



# VISITOR PROFILE – TRAVEL PARTY SIZE



# VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
<b>Alone</b>	14.0%	19.4%
<b>Spouse</b>	53.8%	48.0%
<b>Child &lt;18</b>	25.6%	16.8%
<b>Other adult family</b>	22.9%	20.5%
<b>Friend/ Associate</b>	15.6%	13.7%
<b>Girlfriend/ boyfriend</b>	9.9%	9.4%
<b>Same sex partner</b>	1.2%	1.1%

# Section 9

## ISLAND SURVEY METHODOLOGY

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	2,964	1.80%
<b>U.S. East</b>	2,243	2.07%
<b>All MMAs</b>	5,207	1.36%

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	1,241	2.78%
<b>U.S. East</b>	447	4.64%
<b>All MMAs</b>	1,688	2.39%

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	3,341	1.70%
<b>U.S. East</b>	1,403	2.62%
<b>All MMAs</b>	4,744	1.42%

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



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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	1,464	2.56%
<b>U.S. East</b>	564	4.13%
<b>All MMAs</b>	2,028	2.18%

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