

Visitor Satisfaction Study

Q2 2019

Prepared for:
Hawai'i Tourism Authority

[ANTHOLOGY®]

AnthologyGroup.com

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	2,678	1.89	19.24
U.S. East	2,664	1.90	17.71
Japan	1,413	2.61	43.76
Canada	1,338	2.68	31.58
Europe	444	4.65	26.91
Oceania	618	3.94	25.25
China	83	10.76	8.07
Korea	279	5.87	27.87
All MMAs	9,517	1.00	22.36

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

METHODOLOGY – OVERALL (cont.)

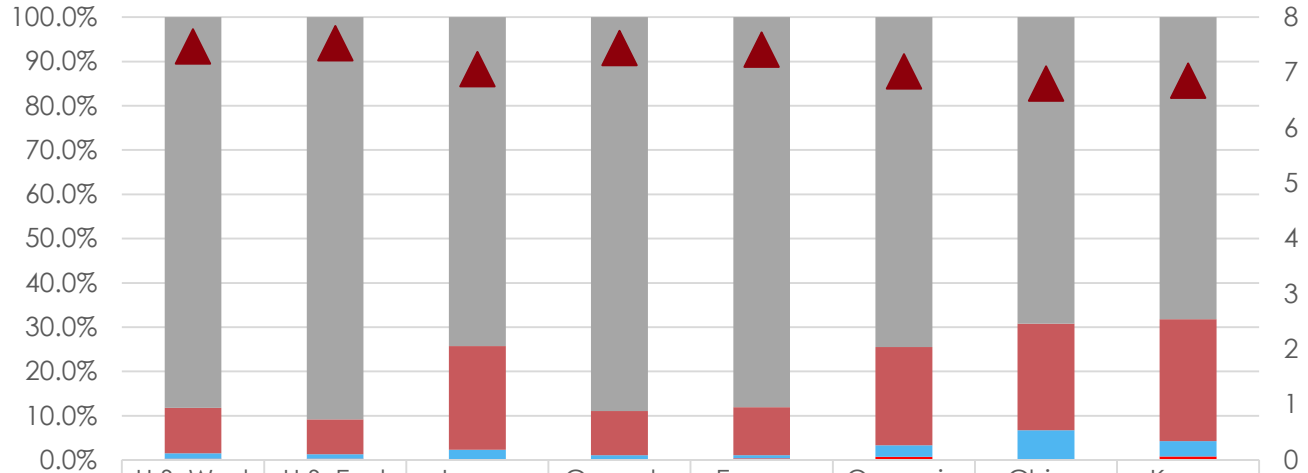
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also 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)	88.3%	90.8%	74.3%	89.0%	88.1%	74.6%	69.2%	68.2%
■ Somewhat satisfied (5-6)	10.3%	7.9%	23.4%	10.0%	10.8%	22.2%	24.1%	27.5%
■ Somewhat dissatisfied (3-4)	1.2%	1.0%	2.1%	0.9%	0.7%	2.6%	6.7%	3.5%
■ Not at all satisfied (1-2)	0.3%	0.3%	0.2%	0.2%	0.4%	0.7%	0.0%	0.8%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.47	7.53	7.06	7.44	7.41	7.02	6.80	6.85

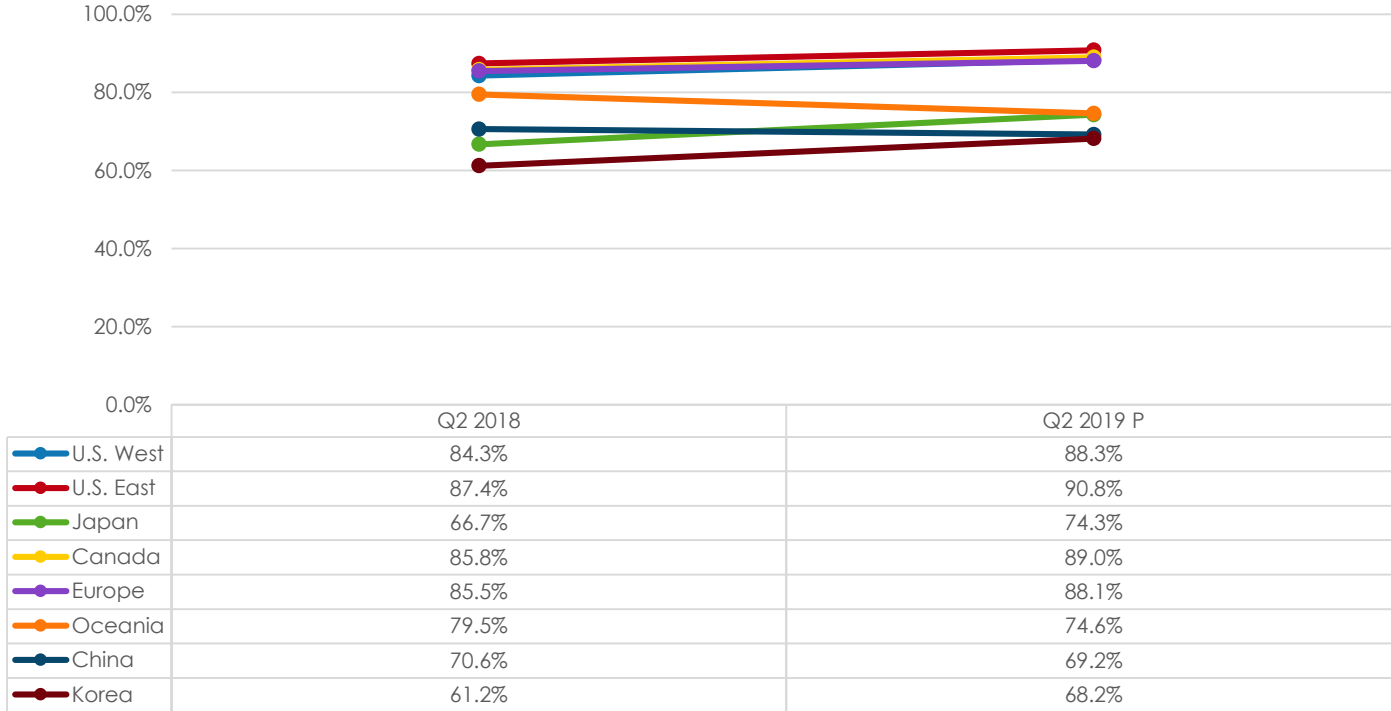
OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S., Canada, and Europe tended to be the most satisfied with their most recent trip to the State.
- Those in smaller travel parties tended to provide lower satisfaction scores than those in groups of three or more.
- Female visitors on average give higher satisfaction scores than their male counterparts.
- The results show that visitors that travel to multiple islands during their trip generally are more satisfied than those who visited a single island.

OVERALL SATISFACTION – MOST RECENT VISIT

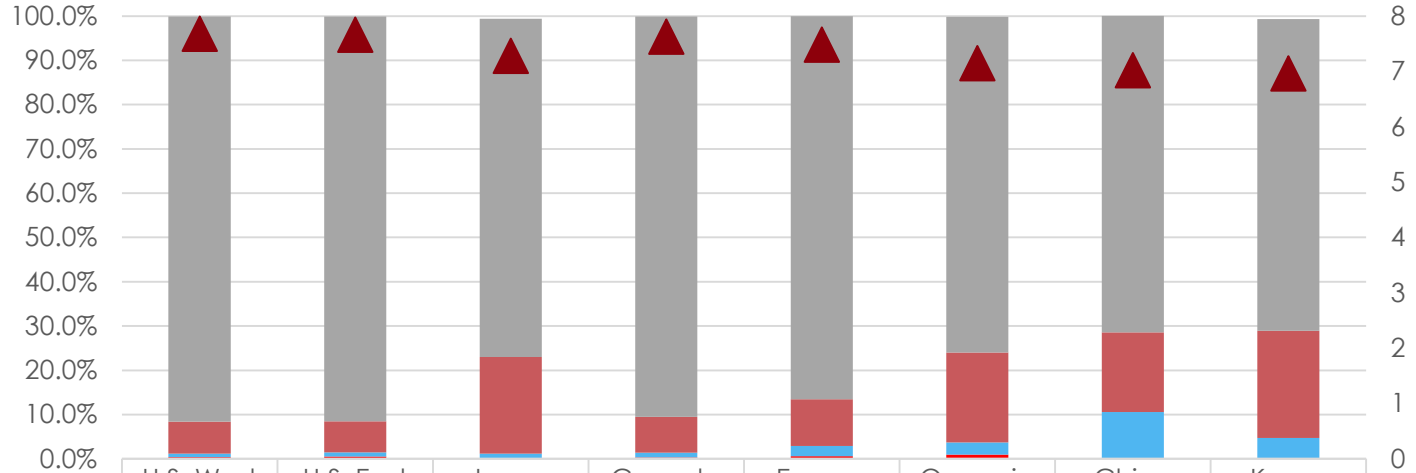
8-pt Rating Scale
8=Extremely Satisfied / 1=Not Satisfied at All



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)	91.5%	91.4%	76.4%	90.4%	86.5%	75.8%	71.5%	70.4%
Somewhat likely (5-6)	7.2%	7.0%	21.8%	8.1%	10.6%	20.3%	18.0%	24.2%
Somewhat unlikely (3-4)	0.8%	1.0%	1.1%	1.1%	2.3%	2.7%	10.6%	4.7%
Very unlikely (1-2)	0.4%	0.5%	0.1%	0.3%	0.6%	1.0%	0.0%	0.0%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
MEAN	7.68	7.66	7.28	7.63	7.48	7.15	7.02	6.96

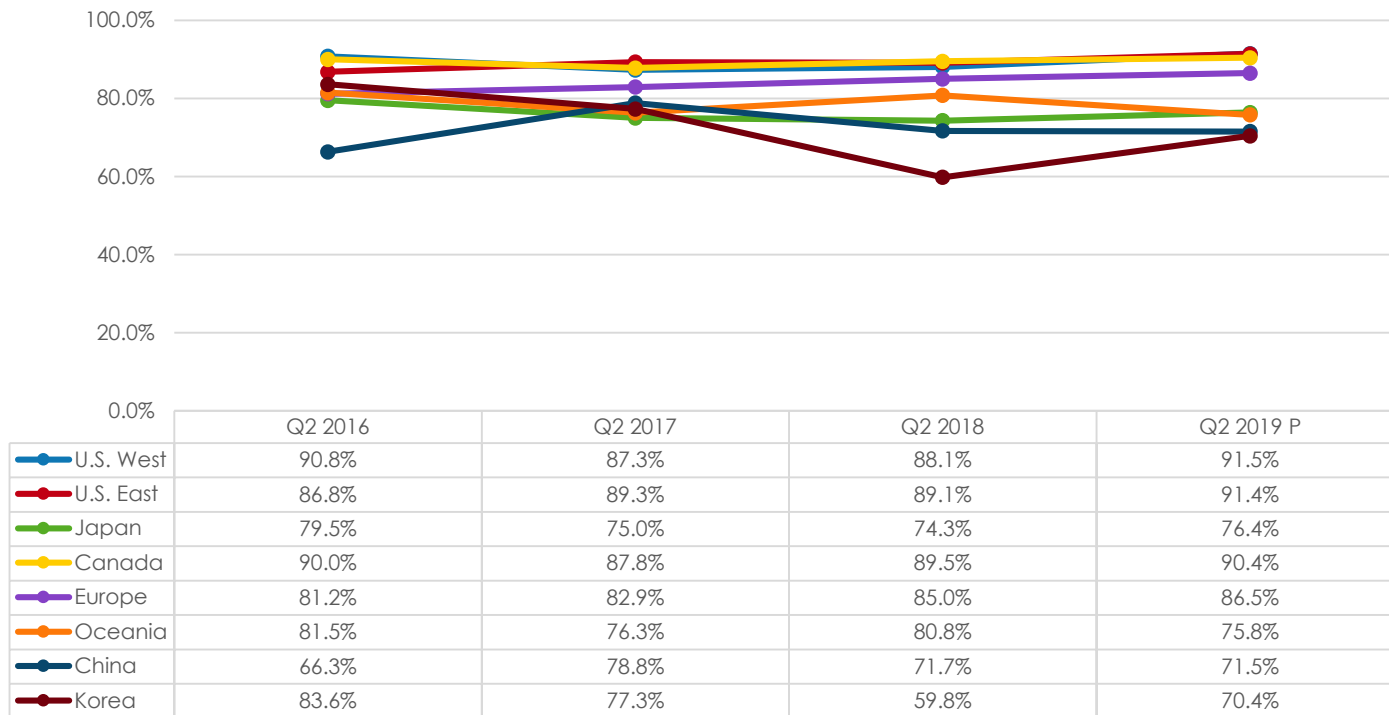
BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from Asia were the least likely to recommend a trip to Hawai'i to others.
- Repeat visitors were more likely to recommend Hawai'i to others than were first-time visitors.
- Female visitors show a greater likelihood to recommend the destination to others.

BRAND/DESTINATION – ADVOCACY

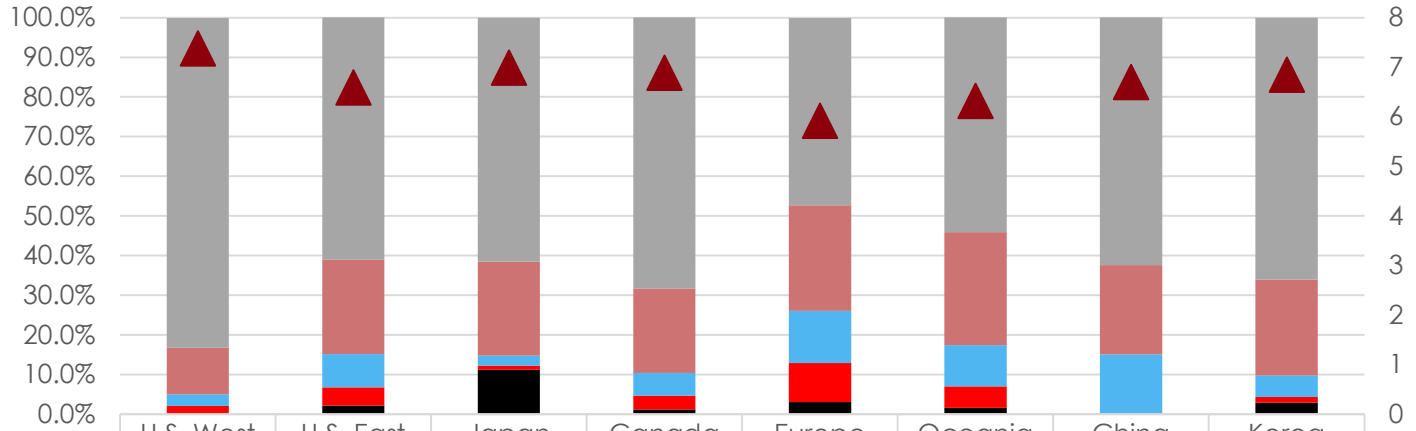
TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	83.1%	61.1%	61.5%	68.4%	47.2%	54.2%	62.5%	66.0%
■ Somewhat likely (5-6)	11.8%	23.8%	23.7%	21.3%	26.6%	28.5%	22.5%	24.2%
■ Somewhat unlikely (3-4)	2.9%	8.4%	2.5%	5.7%	13.2%	10.4%	15.1%	5.4%
■ Very unlikely (1-2)	1.8%	4.6%	1.1%	3.5%	9.8%	5.4%	0.0%	1.5%
■ Not Sure	0.3%	2.2%	11.2%	1.2%	3.1%	1.6%	0.0%	2.9%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.38	6.59	6.99	6.89	5.92	6.32	6.70	6.85

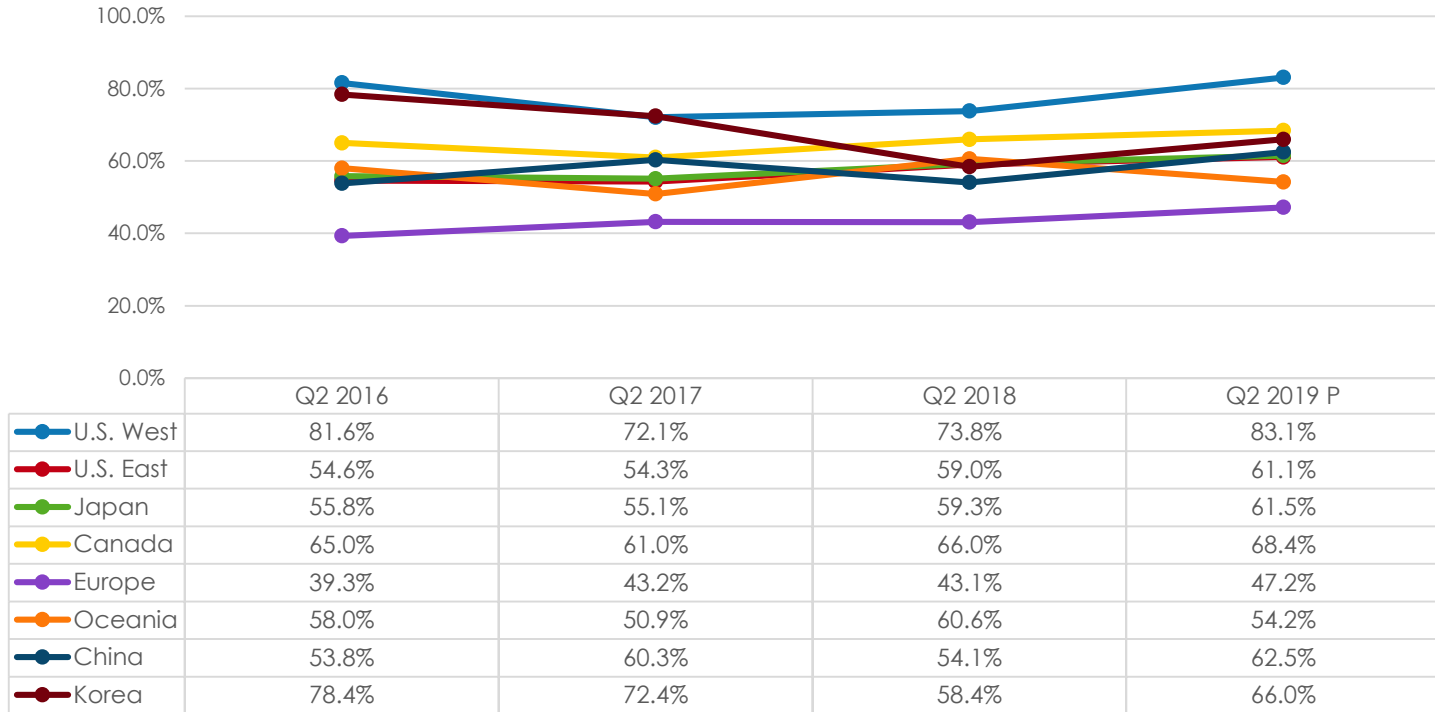
LIKELIHOOD OF RETURN VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S. West were the most likely to return. Geography/ distance to Hawai'i impacts these results, as scores are lower for visitors from other markets.
- Those here on their honeymoon or to get married are the least likely to indicate a return visit in the next five years.
- More affluent segments (U.S. \$) of the visitor base are more likely to return in the next five years.
- Travelers who visited just a single island on their trip were more likely to express interest in returning in the next five years, more so than those who visited multiple islands during their stay.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q2 2018	Q2 2019 P
53.7% Too expensive	40.1% Too expensive
31.7% Want to go someplace new	35.0% Want to go someplace new
23.9% Too crowded/ congested/ traffic	23.5% Too crowded/ congested/ traffic
18.2% Too commercialized/ overdeveloped	17.7% Too commercialized/ overdeveloped
26.9% Poor value	17.6% Poor value
13.4% No reason to return/ nothing new	17.5% Other financial obligations
14.5% Other financial obligations	16.8% Five years is too soon
17.5% Flight is too long	11.7% Unfriendly people
14.2% Five years is too soon	10.2% Flight is too long

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q2 2018	Q2 2019 P
47.3% Too expensive	52.6% Too expensive
45.5% Flight is too long	42.0% Want to go someplace new
39.2% Want to go someplace new	41.3% Flight is too long
18.3% Other financial obligations	19.2% Five years is too soon
16.3% Five years is too soon	17.1% Other financial obligations
15.2% Poor value	15.9% Poor value
15.0% Too crowded/ congested/ traffic	12.9% Too crowded/ congested/ traffic
12.3% Too commercialized/ overdeveloped	10.9% Too commercialized/ overdeveloped

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q2 2018	Q2 2019 P
45.5% Too expensive	41.1% Too expensive
27.6% Other financial obligations	28.2% Want to go someplace new
27.0% Flight is too long	27.1% Five years is too soon
26.9% Want to go someplace new	26.1% Other financial obligations
26.7% Five years is too soon	22.7% Flight is too long
10.8% No reason to return/ nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CANADA

Q2 2018	Q2 2019 P
44.3% Too expensive	53.6% Too expensive
43.8% Want to go someplace new	45.5% Want to go someplace new
33.9% Flight is too long	39.6% Flight is too long
22.0% Poor value	24.9% Five years is too soon
21.7% Five years is too soon	21.4% Poor value
14.4% Too crowded/ congested/ traffic	15.5% Too commercialized/ overdeveloped
12.9% Other financial obligations	12.5% Too crowded/ congested/ traffic
11.0% Too commercialized/ overdeveloped	11.9% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS EUROPE

Q2 2018	Q2 2019 P
65.2% Flight is too long	63.6% Flight is too long
52.0% Too expensive	52.3% Too expensive
33.6% Want to go someplace new	36.7% Want to go someplace new
22.4% Five years is too soon	15.7% Five years is too soon
14.9% Poor value	13.3% Poor value
14.0% Other financial obligations	13.2% Too commercialized/ overdeveloped
12.9% Too commercialized/ overdeveloped	12.4% No reason to return/ nothing new
	10.6% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q2 2018	Q2 2019 P
51.7% Want to go someplace new	37.6% Too expensive
45.3% Too expensive	35.6% Want to go someplace new
34.1% Poor value	31.0% Too commercialized/ overdeveloped
27.6% Too commercialized/ overdeveloped	29.9% Poor value
21.4% Too crowded/ congested/ traffic	20.5% Too crowded/ congested/ traffic
18.6% Flight is too long	19.4% No reason to return/ nothing new
17.9% Other financial obligations	18.2% Five years is too soon
17.3% No reason to return/ nothing new	16.7% Flight is too long
14.3% Five years is too soon	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CHINA

Q2 2018	Q2 2019 P
43.8% Flight is too long	47.8% Poor value
37.5% Too expensive	29.8% Too expensive
25.0% No reason to return/ Nothing new	
25.0% Poor value	
18.8% Want to go someplace new	
18.8% Too commercialized/ overdeveloped	
18.8% Five years is too soon	
12.5% Too crowded/ congested	

P= Preliminary Data

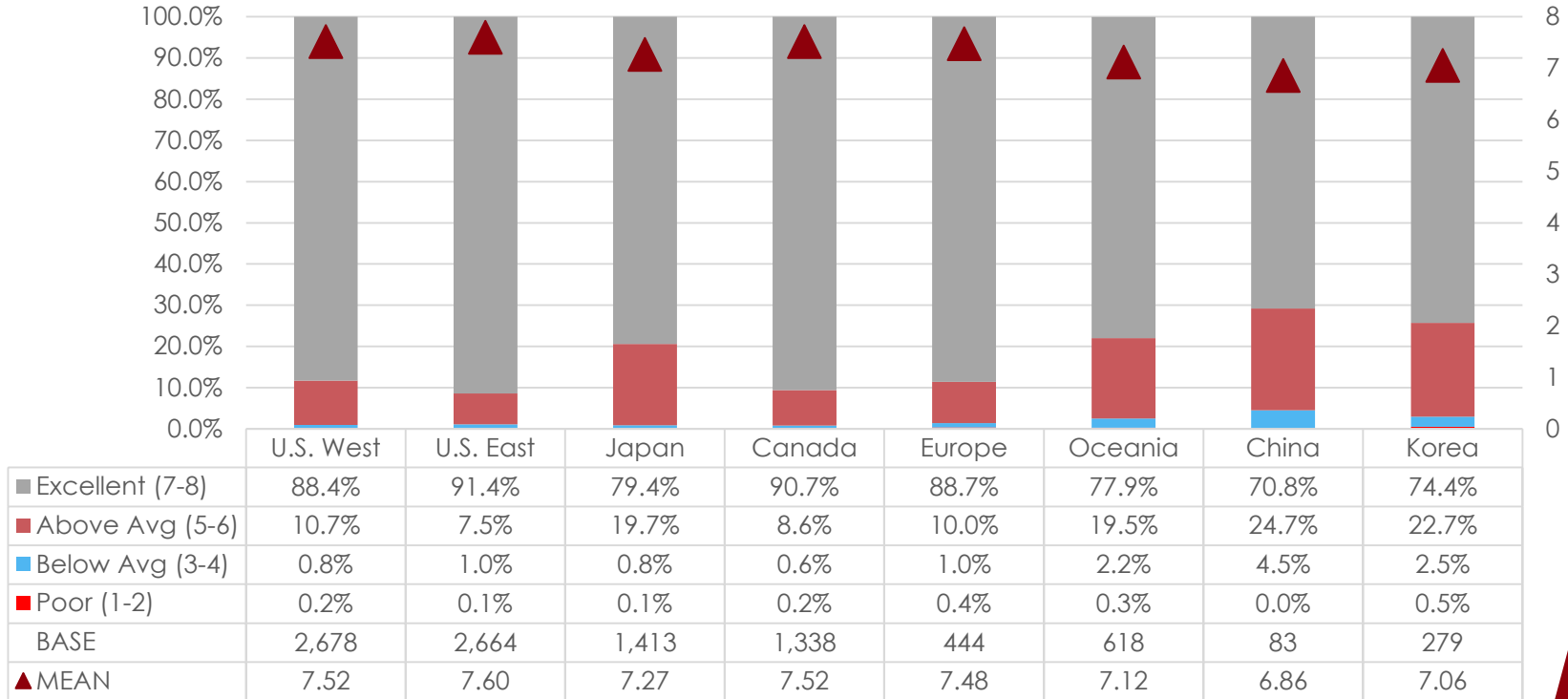
UNLIKELY TO RETURN – TOP REASONS KOREA

Q2 2018	Q2 2019 P
63.1% Too expensive	72.1% Too expensive
44.5% Poor value	48.3% Flight is too long
41.9% Flight is too long	40.1% Poor value
34.3% No reason to return/ Nothing new	25.2% No reason to return/ Nothing new
29.3% Want to go someplace new	25.2% Other financial obligations
23.8% Five years is too soon	24.5% Too crowded/ congested
15.8% Other financial obligations	21.8% Five years is too soon
13.1% Too commercialized/ overdeveloped	17.7% Poor service
	16.3% Unfriendly people

P= Preliminary Data

SATISFACTION – STATE OF HAWAI‘I BY MMA

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



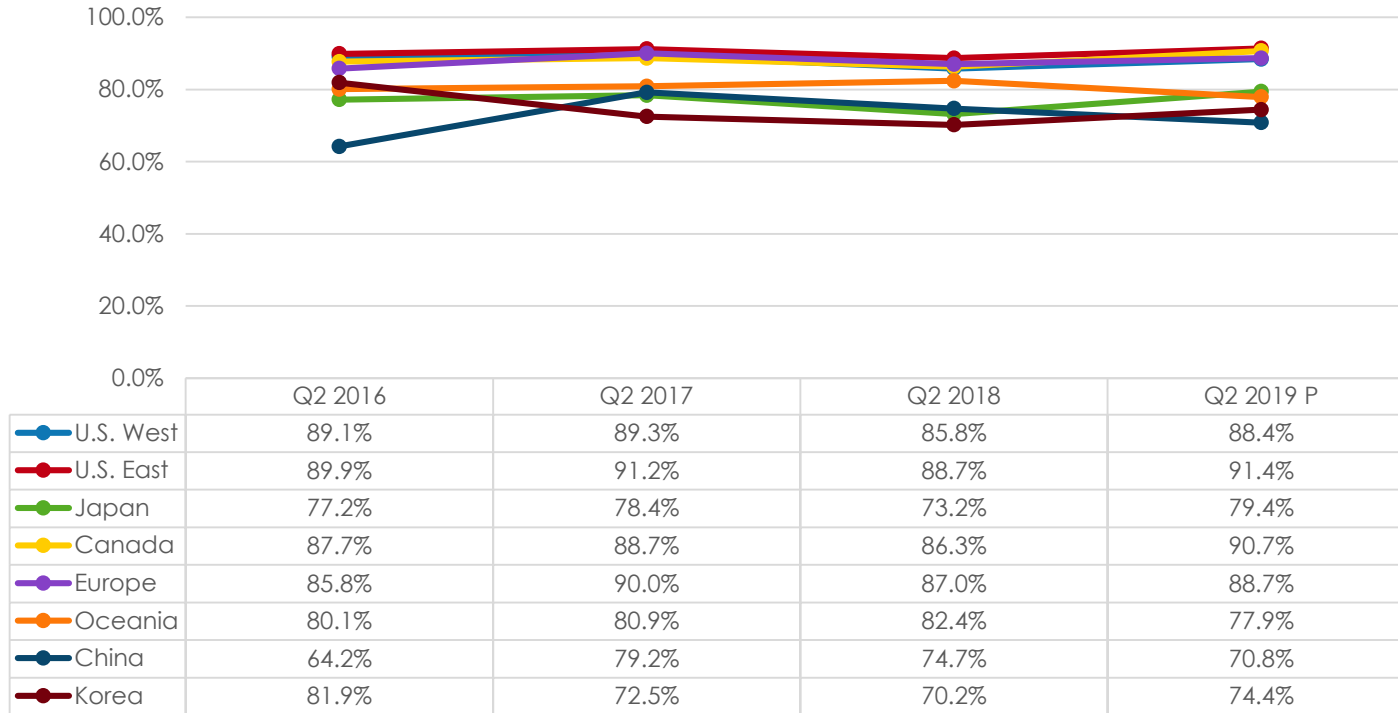
SATISFACTION – STATE OF HAWAI‘I BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Overall satisfaction tends to be lower among visitors from Asia.
- Females tend to give higher satisfaction scores than their male counterparts.
- Those who visited multiple islands during their tended to give higher satisfaction scores compared to those who visited a single island.

SATISFACTION – STATE OF HAWAI‘I BY MMA

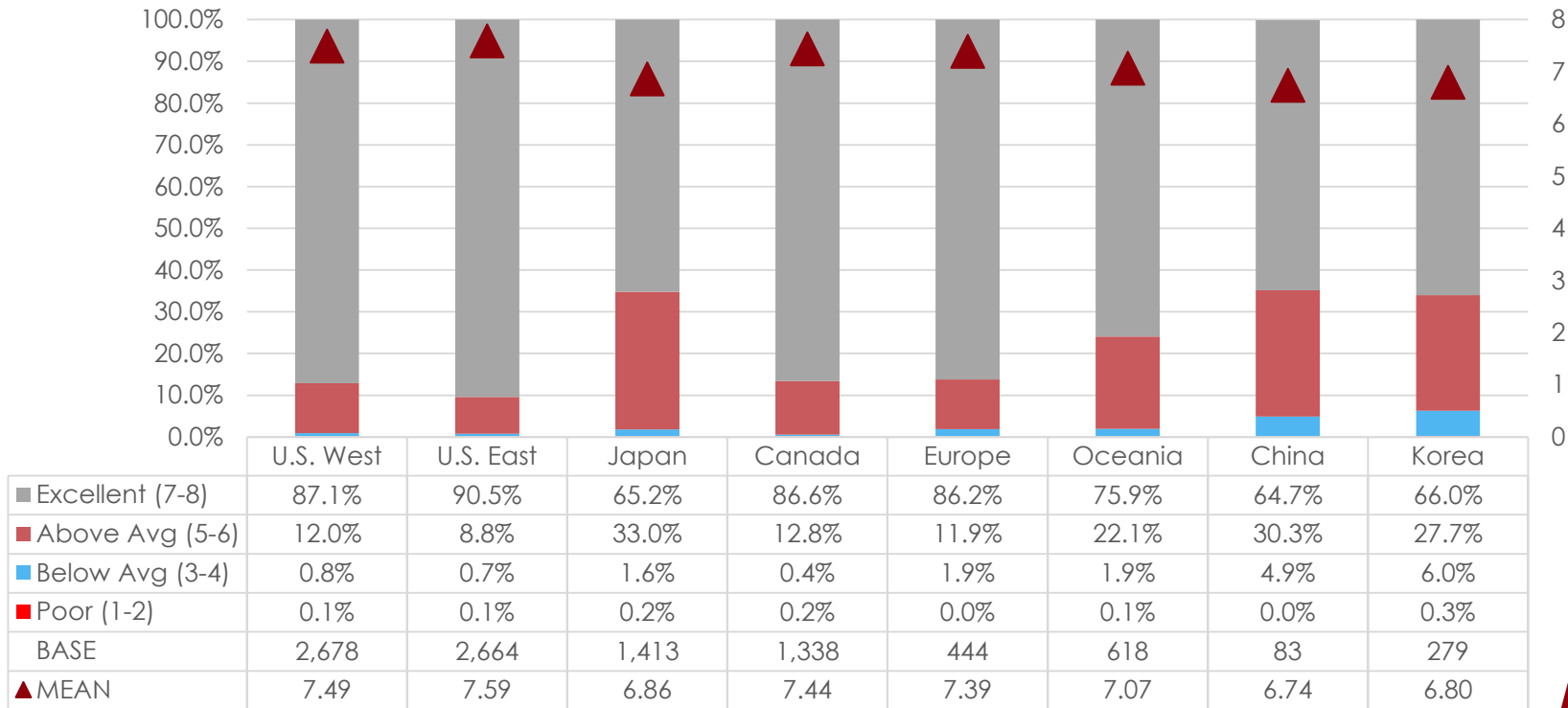
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

OFFERING A VARIETY OF EXPERIENCES

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



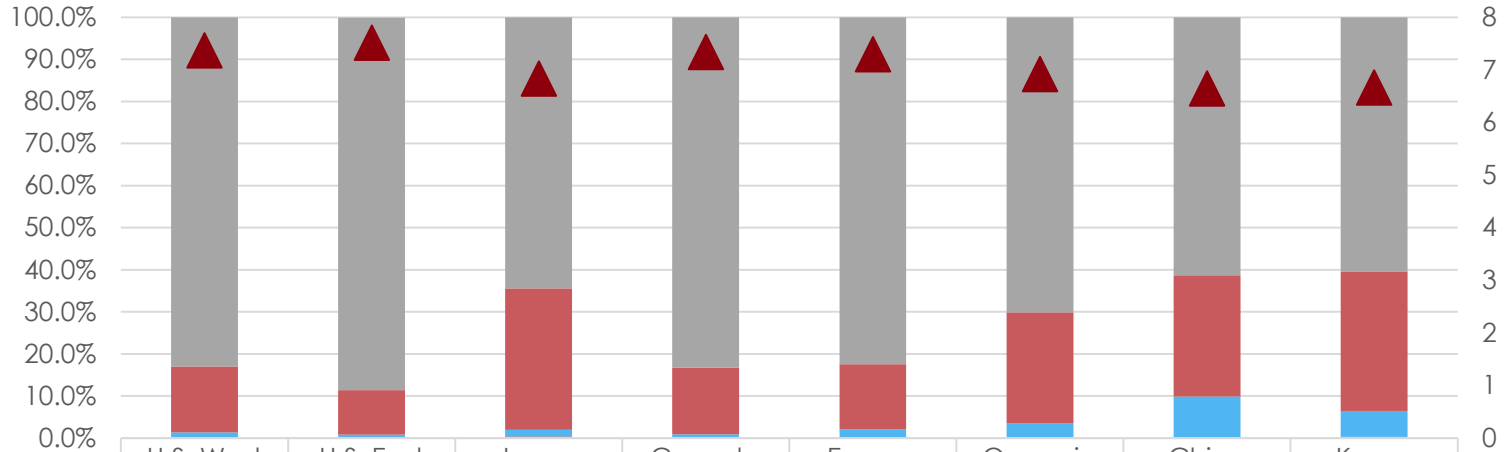
OFFERING A VARIETY OF EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Satisfaction in this particular area is highest among visitors from the U.S., Canada, and Europe.
- Male respondents appear less satisfied with variety of experiences on their most recent trip.
- The results indicate that visiting multiple islands increases the level of satisfaction with the variety of experiences during their stay.

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)	83.0%	88.5%	64.4%	83.3%	82.4%	70.1%	61.3%	60.4%
■ Above Avg (5-6)	15.6%	10.6%	33.6%	15.8%	15.5%	26.3%	28.8%	33.1%
■ Below Avg (3-4)	1.3%	0.7%	1.6%	0.8%	2.1%	3.6%	9.9%	6.2%
■ Poor (1-2)	0.1%	0.1%	0.4%	0.1%	0.0%	0.0%	0.0%	0.3%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.37	7.52	6.84	7.34	7.30	6.92	6.65	6.67

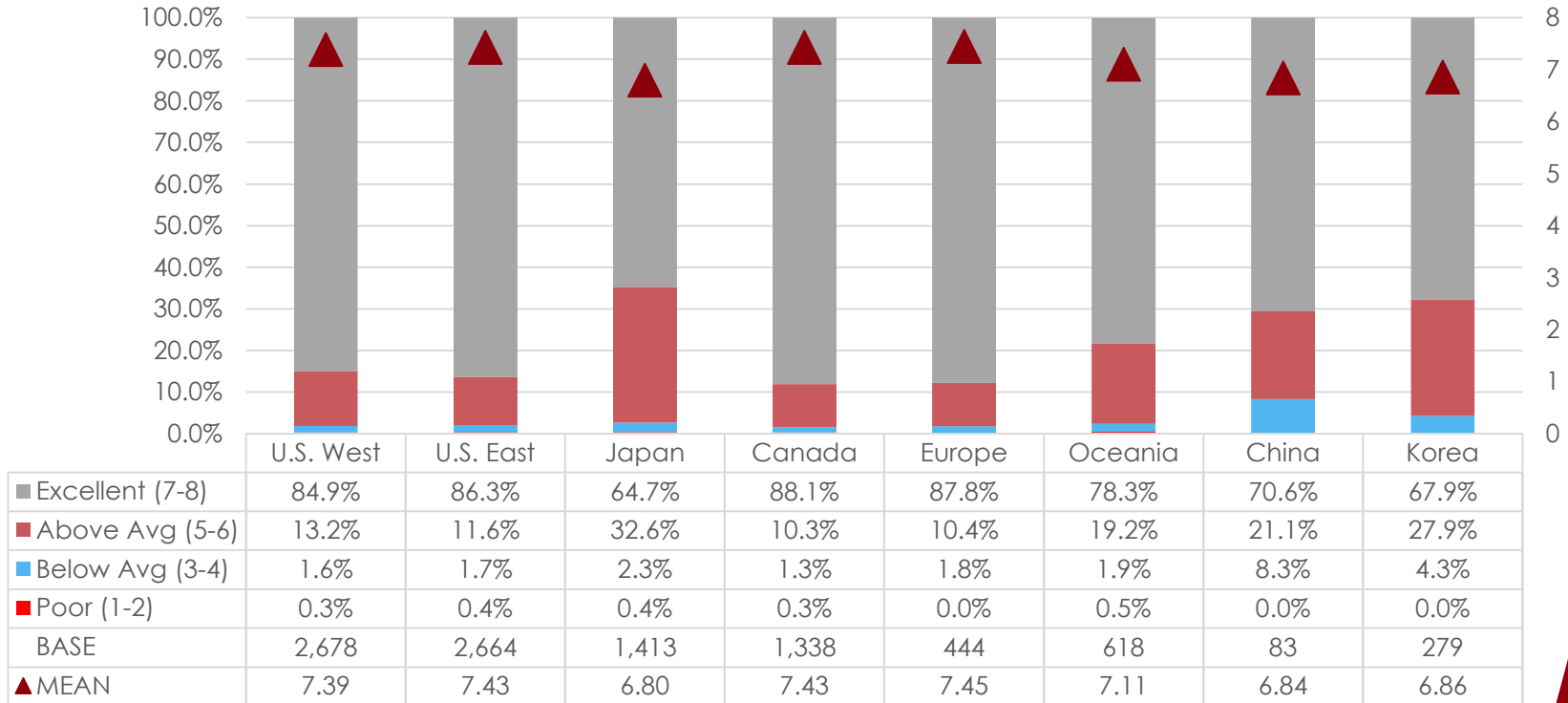
NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Mean scores are lower among visitors from Japan, Korea, and China.
- Those who were traveling in larger travel parties provided higher satisfaction scores in this area.
- Respondents who visited multiple islands during their most recent trip provided higher mean scores when asked about unique and different experiences compare to those who visited a single island.

BEING A SAFE AND SECURE DESTINATION

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

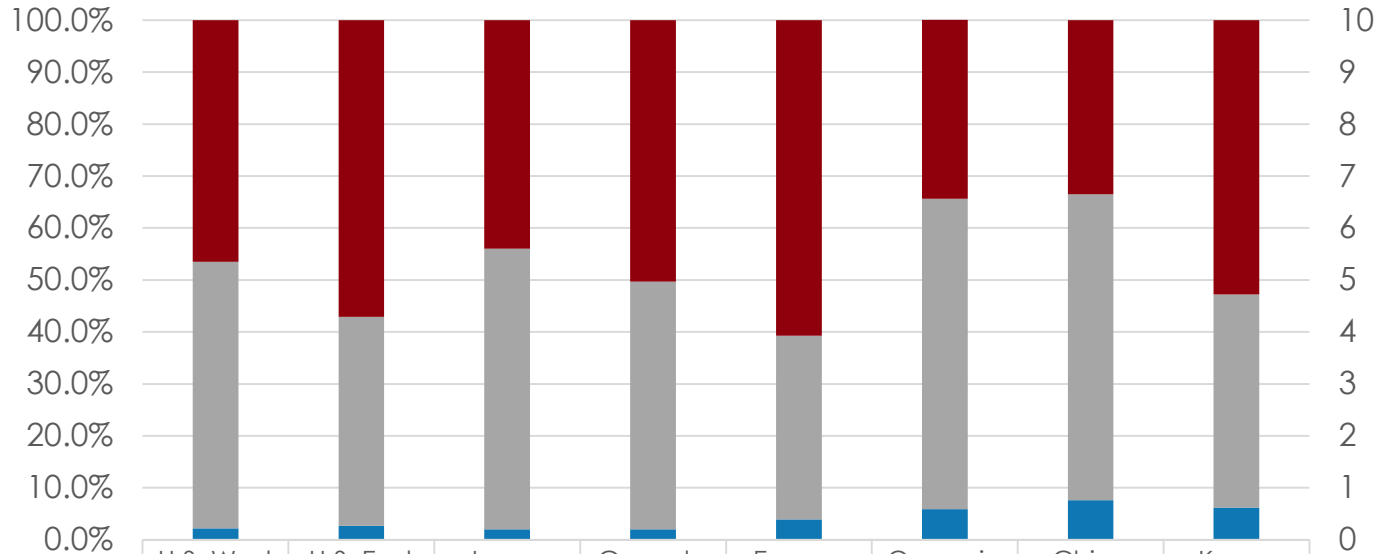


BEING A SAFE AND SECURE DESTINATION

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S., Canada, and Europe tend to give higher marks as far as feel safe and secure on their most recent trip than do those visitors from other MMAs.
- Younger travelers tend to give lower scores in this area compared to seniors as well as those traveling with families.
- Female visitors generally felt safer during their trip than did male visitors.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Exceeded expectations	46.5%	57.1%	44.0%	50.3%	60.7%	34.5%	33.5%	52.8%
Met expectations	51.3%	40.2%	54.0%	47.7%	35.4%	59.7%	58.9%	41.0%
Did NOT meet expectations	2.2%	2.7%	2.0%	2.0%	3.9%	5.9%	7.6%	6.2%
BASE	2,678	2,664	1,413	1,338	444	618	83	279

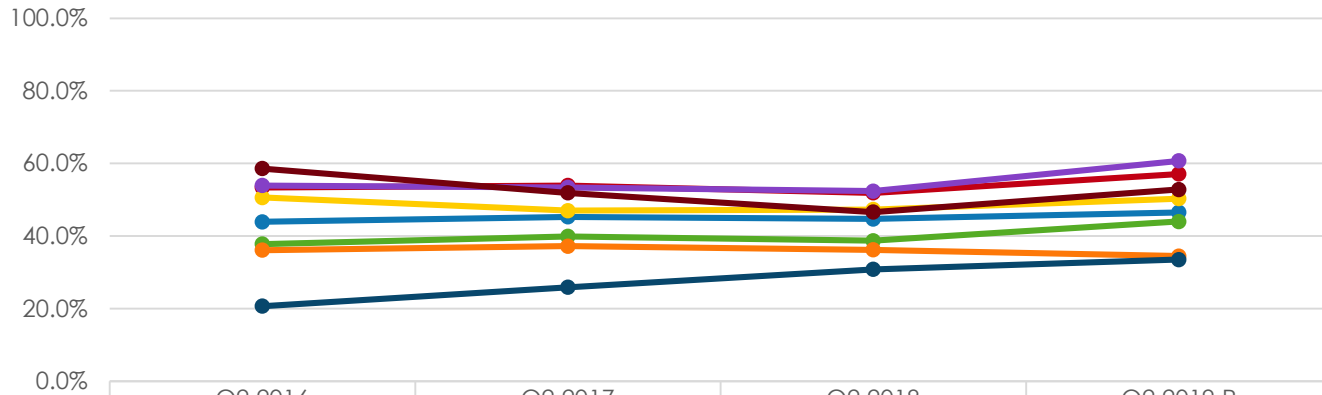
SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

- Visitors from Europe were the most likely to indicate their trip exceeded their expectations while Chinese visitors were the least likely to feel this way.
- Those respondents that went to multiple islands were more likely to indicate the trip exceeded their expectations.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



	Q2 2016	Q2 2017	Q2 2018	Q2 2019 P
U.S. West	43.9%	45.3%	44.7%	46.5%
U.S. East	53.4%	53.9%	51.9%	57.1%
Japan	37.8%	39.9%	38.7%	44.0%
Canada	50.6%	47.0%	47.3%	50.3%
Europe	53.9%	53.4%	52.4%	60.7%
Oceania	36.1%	37.2%	36.2%	34.5%
China	20.7%	25.9%	30.8%	33.5%
Korea	58.6%	51.9%	46.6%	52.8%

P= Preliminary Data

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	94.7%	96.9%	95.8%	96.6%	97.3%	93.2%	95.0%	96.9%
On own (self-guided)	83.2%	80.4%	62.7%	82.2%	71.6%	43.5%	56.6%	72.7%
Helicopter/ airplane	6.2%	10.8%	2.7%	7.6%	16.2%	7.4%	26.8%	5.1%
Boat/ submarine/ whale	23.9%	28.9%	9.9%	25.8%	24.9%	17.5%	30.7%	17.1%
Visit towns/communities	54.9%	53.8%	33.5%	55.0%	47.0%	30.6%	34.8%	39.3%
Limo/ van/ bus tour	7.3%	18.8%	23.8%	11.7%	17.4%	35.3%	18.2%	13.8%
Scenic views/ natural landmark	58.0%	68.2%	20.7%	64.6%	64.7%	49.2%	53.9%	53.7%
Movie/ TV/ film location	4.2%	6.8%	3.4%	6.4%	8.4%	6.4%	29.3%	14.2%

ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.7%	96.6%	96.4%	98.7%	97.2%	92.9%	96.8%	98.2%
Beach/ sunbathing	86.4%	83.9%	72.4%	90.3%	83.7%	72.4%	80.2%	76.5%
Bodyboard/ Standup paddle board	14.3%	11.0%	2.8%	15.0%	9.3%	7.5%	3.9%	9.2%
Surfing	6.0%	6.2%	2.2%	10.6%	10.4%	7.7%	5.5%	11.1%
Canoeing/ kayak	8.7%	7.8%	2.2%	6.8%	8.5%	4.2%	4.5%	3.8%
Swim in the ocean	69.9%	66.9%	31.9%	76.4%	68.8%	58.1%	34.1%	47.2%
Snorkel	50.2%	45.8%	17.7%	55.6%	44.8%	26.8%	29.8%	42.9%
Windsurf/ Kitesurf	0.5%	0.3%	0.1%	0.6%	0.9%	0.1%	1.1%	0.5%
Jet ski/ Parasail	2.0%	2.2%	1.9%	0.9%	0.7%	1.2%	3.4%	4.4%
Scuba diving	3.3%	3.3%	1.7%	2.0%	2.5%	0.2%	1.1%	3.2%
Fishing	3.8%	3.5%	1.2%	1.9%	1.0%	0.8%	2.3%	1.0%
Golf	6.5%	6.0%	8.6%	5.9%	3.3%	3.6%	0.0%	2.3%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.7%	96.6%	96.4%	98.7%	97.2%	92.9%	96.8%	98.2%
Run/ Jog/ Fitness walk	25.2%	23.5%	11.2%	26.2%	16.9%	20.4%	16.6%	5.7%
Spa	9.0%	10.6%	6.6%	5.8%	5.5%	5.6%	8.4%	5.1%
Hiking	47.6%	51.1%	16.4%	55.0%	48.2%	19.1%	41.6%	21.2%
Backpack/ camp	1.8%	2.1%	0.1%	2.3%	2.6%	0.7%	6.1%	1.1%
Agritourism	13.5%	17.8%	15.9%	11.9%	10.5%	8.1%	16.4%	18.2%
Sport event/ tournament	1.5%	1.2%	1.7%	1.6%	2.0%	2.0%	0.0%	1.8%
Park/ botanical garden	35.8%	45.0%	22.9%	42.4%	43.1%	30.8%	38.9%	19.9%
Waterpark	1.8%	1.4%	2.1%	1.5%	1.9%	1.2%	4.5%	2.3%
Mountain tube/ waterfall rappel	2.2%	1.9%	0.7%	2.2%	4.5%	1.6%	1.6%	0.0%
Zip-lining	6.9%	5.5%	0.9%	3.1%	2.0%	3.8%	1.1%	1.7%
Skydiving	0.7%	0.6%	1.0%	0.5%	1.4%	0.2%	4.5%	3.8%
All terrain vehicle (ATV)	2.8%	3.8%	0.9%	2.1%	3.5%	3.0%	10.0%	9.3%
Horseback riding	1.9%	3.2%	5.1%	1.7%	1.8%	0.8%	2.3%	0.3%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	98.2%	97.5%	97.4%	98.3%	97.6%	98.6%	96.1%	98.0%
Lunch/ sunset/ dinner/ evening cruise	20.8%	26.2%	12.3%	25.1%	30.5%	15.8%	63.6%	38.5%
Live music/ stage show	31.1%	37.7%	19.1%	30.4%	33.2%	22.3%	17.1%	13.0%
Nightclub/ dancing/ bar/ karaoke	9.0%	9.7%	5.9%	9.1%	8.2%	7.9%	4.5%	4.2%
Fine dining	52.4%	52.9%	44.6%	42.8%	40.1%	37.6%	42.5%	49.9%
Family restaurant	62.6%	60.6%	22.4%	61.0%	43.8%	67.0%	16.1%	33.7%
Fast food	33.2%	36.6%	50.6%	46.7%	43.6%	48.3%	52.5%	54.4%
Food truck	29.6%	31.8%	14.7%	36.1%	34.3%	20.5%	23.4%	44.9%
Café/ coffee house	46.1%	42.7%	48.7%	52.2%	52.1%	60.4%	32.5%	54.9%
Ethnic dining	31.1%	35.1%	9.6%	25.5%	21.2%	11.8%	17.3%	26.8%
Prepared own meal	52.4%	39.4%	18.3%	64.5%	35.0%	21.9%	17.3%	11.9%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	95.6%	95.9%	97.8%	96.5%	95.8%	98.1%	96.1%	96.5%
Mall/ department store	41.0%	41.4%	75.7%	55.8%	51.3%	74.0%	67.0%	73.7%
Designer boutique	16.6%	17.3%	17.2%	17.2%	14.0%	17.9%	16.1%	4.1%
Hotel/ resort store	33.1%	38.1%	36.4%	26.9%	27.2%	32.7%	25.0%	26.6%
Swap meet/ flea market	16.1%	15.1%	3.4%	17.3%	5.0%	8.6%	1.6%	2.2%
Discount/ outlet store	15.9%	16.7%	20.5%	21.8%	18.5%	47.1%	38.4%	57.9%
Supermarket	66.5%	56.6%	67.8%	69.1%	66.9%	49.7%	65.7%	54.3%
Farmer's market	36.2%	28.4%	21.3%	40.6%	29.5%	15.7%	13.9%	9.0%
Convenience store	46.0%	48.6%	39.9%	50.9%	34.8%	61.8%	38.9%	47.2%
Duty free store	3.4%	4.0%	30.9%	6.4%	5.1%	10.4%	45.7%	46.3%
Local shop/ artisan	65.6%	66.8%	13.4%	66.6%	59.3%	50.5%	33.0%	16.6%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	68.7%	76.7%	55.9%	70.2%	71.1%	72.0%	80.2%	55.7%
Historic military site	14.4%	29.5%	15.8%	17.8%	30.1%	42.3%	49.1%	15.3%
Other historical site	25.5%	32.2%	18.1%	25.5%	26.7%	18.8%	31.1%	19.6%
Museum/ art gallery	16.6%	16.1%	5.0%	16.0%	16.2%	16.4%	18.4%	5.9%
Luau/ Polynesian show/ hula show	31.5%	44.7%	15.4%	34.7%	33.3%	29.4%	17.5%	24.1%
Lesson- ex. ukulele, hula, canoe, lei making	7.4%	8.7%	6.9%	7.6%	9.6%	6.1%	8.4%	5.8%
Play/ concert/ theatre	4.2%	3.7%	3.2%	4.0%	2.9%	3.5%	1.1%	4.6%
Art/ craft fair	14.6%	11.9%	3.1%	11.8%	7.1%	4.8%	6.1%	5.0%
Festival event	5.3%	5.3%	2.8%	5.0%	5.5%	4.6%	1.6%	2.2%

ACTIVITIES – TRANSPORTATION

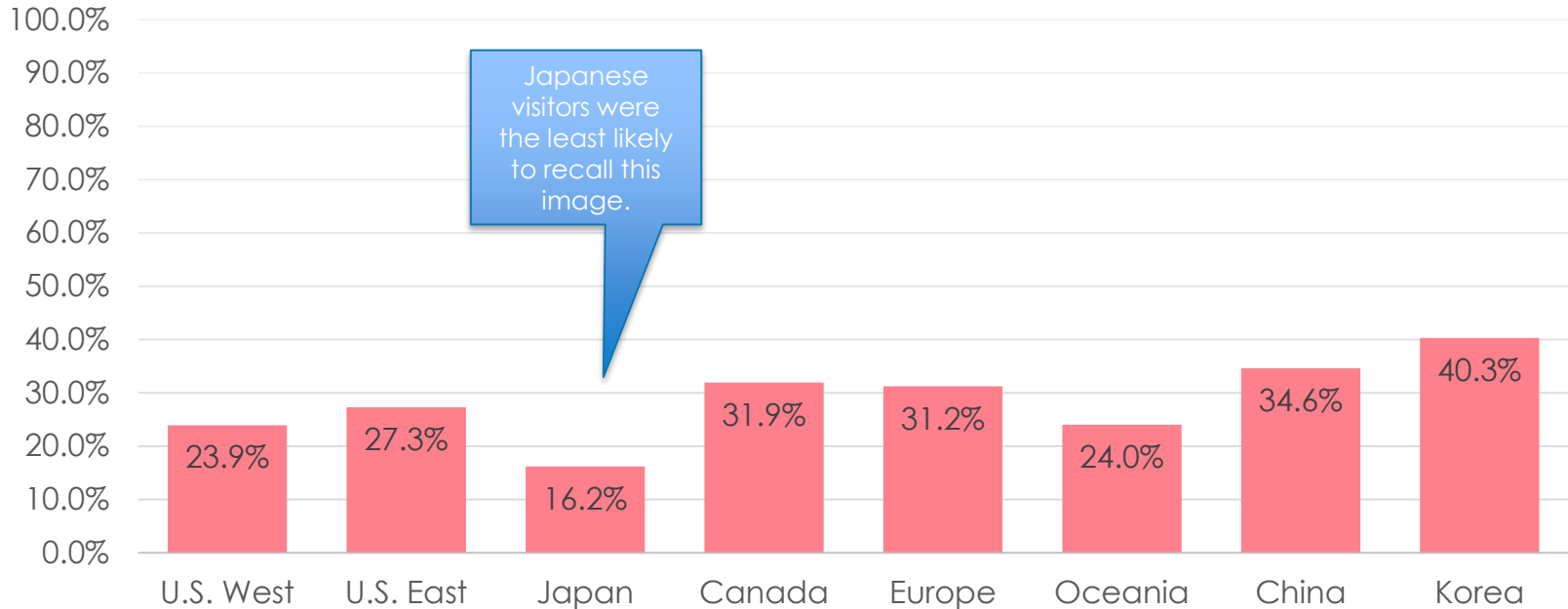
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	92.6%	93.6%	96.6%	96.2%	95.3%	97.8%	92.5%	93.5%
Airport shuttle	16.2%	19.0%	23.5%	21.4%	21.1%	51.7%	10.0%	14.0%
Trolley	2.7%	3.9%	42.0%	5.8%	5.7%	22.8%	3.4%	21.1%
Public bus	3.3%	5.3%	13.0%	10.4%	14.1%	31.8%	13.4%	11.9%
Tour bus/ tour van	7.9%	20.5%	32.8%	11.9%	18.3%	40.0%	24.3%	31.2%
Taxi/ limo	5.4%	9.8%	27.4%	13.9%	21.8%	36.2%	19.5%	23.4%
Rental car	80.9%	74.0%	34.9%	78.3%	62.8%	30.5%	53.9%	58.0%
Ride share	14.2%	19.4%	5.5%	13.9%	18.9%	20.6%	15.7%	12.7%
Bicycle rental	2.8%	2.3%	2.5%	2.8%	3.8%	1.7%	3.4%	0.8%

ACTIVITIES – TRANSPORTATION

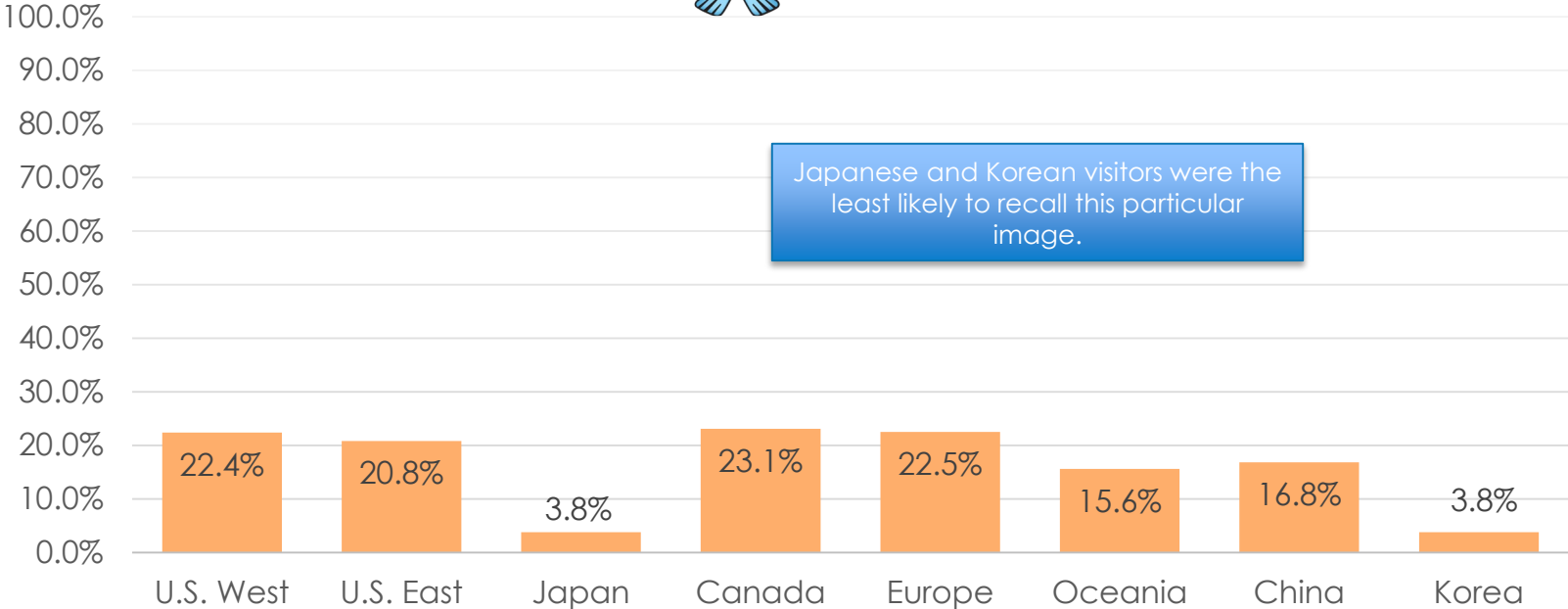
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	27.0%	24.7%	9.9%	14.8%	15.3%	7.3%	10.9%	15.0%
Visit friends/ family	26.4%	23.9%	9.5%	14.4%	13.5%	6.9%	10.9%	13.2%
Volunteer at non-profit	0.8%	1.1%	0.4%	0.6%	1.8%	0.5%	1.6%	1.8%

SECTION – SIGNAGE

HVCB POST-ARRIVAL EXPERIENCE LOGO



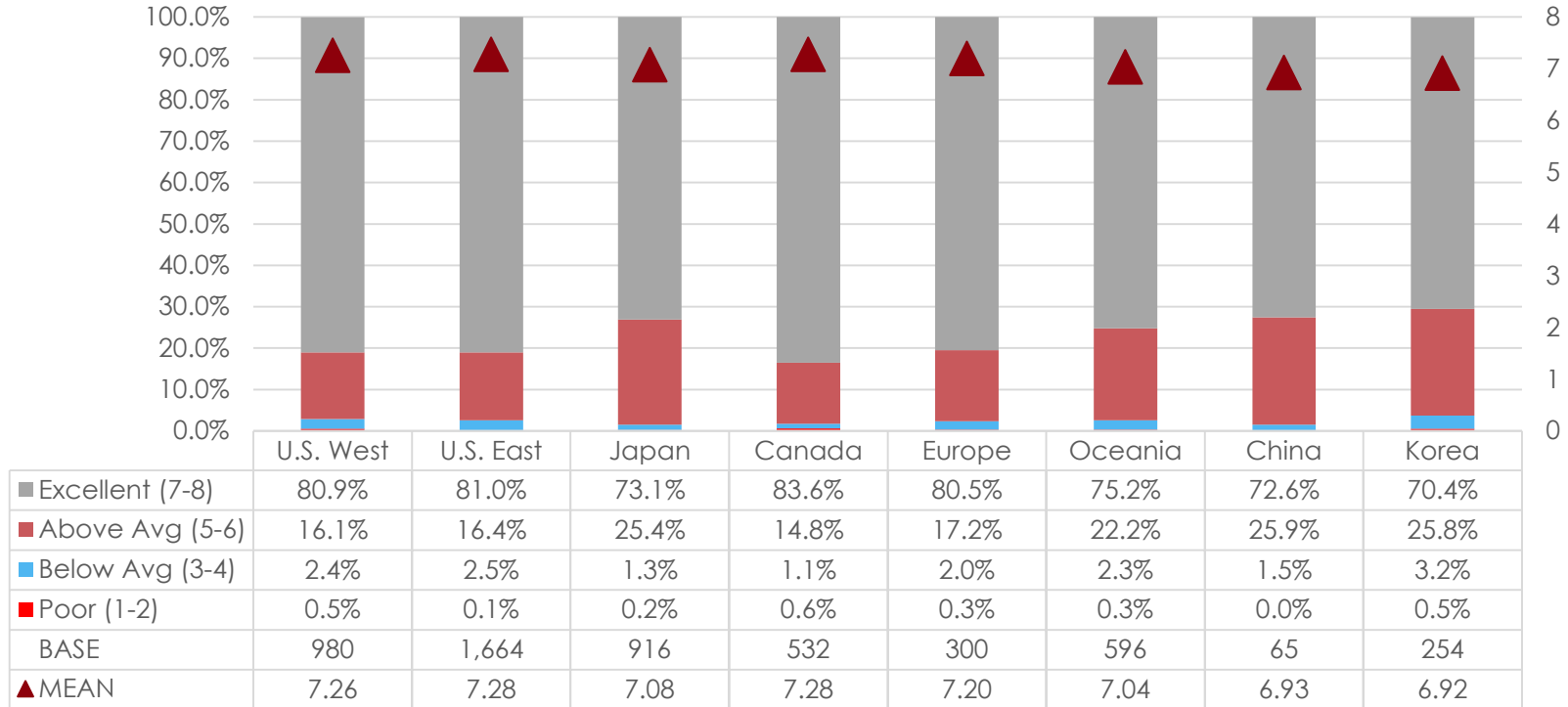
OCEAN SAFETY LOGO



SECTION – O'AHU

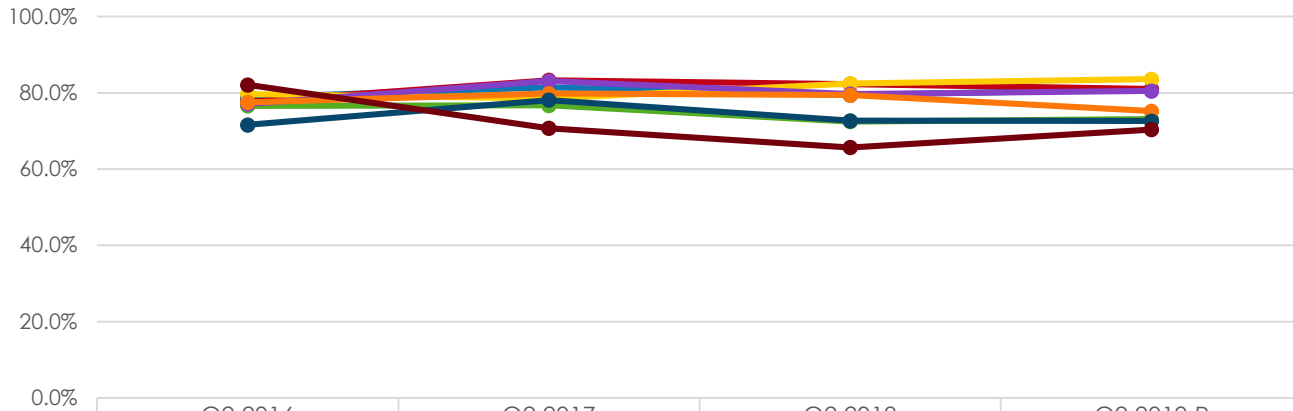
SATISFACTION – O‘AHU

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



SATISFACTION – O‘AHU

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

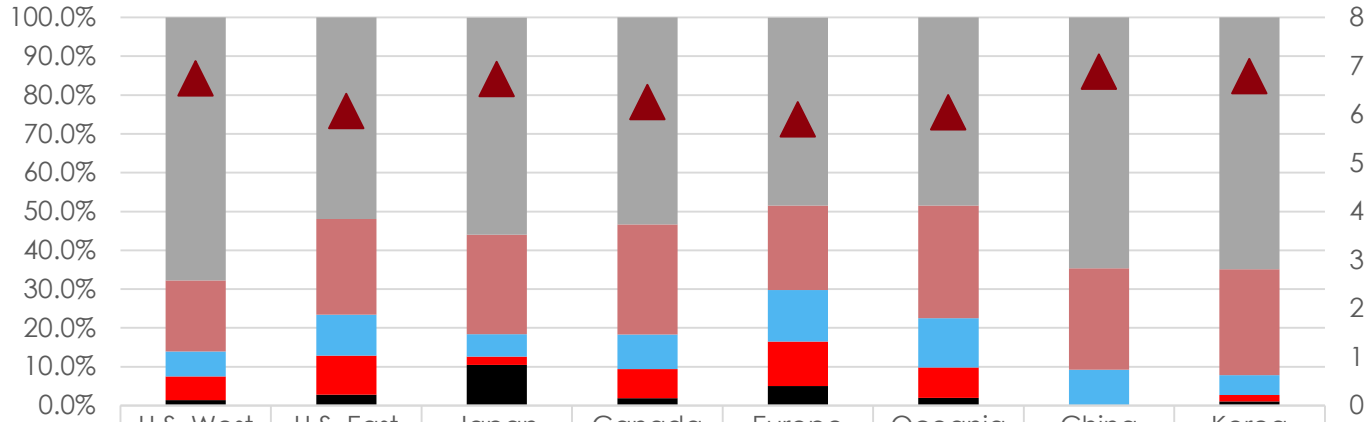


	Q2 2016	Q2 2017	Q2 2018	Q2 2019 P
U.S. West	78.8%	81.4%	79.4%	80.9%
U.S. East	77.7%	83.3%	82.3%	81.0%
Japan	76.6%	76.7%	72.5%	73.1%
Canada	79.7%	78.5%	82.4%	83.6%
Europe	77.1%	83.1%	79.7%	80.5%
Oceania	77.5%	79.8%	79.4%	75.2%
China	71.6%	78.1%	72.7%	72.6%
Korea	82.1%	70.7%	65.7%	70.4%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

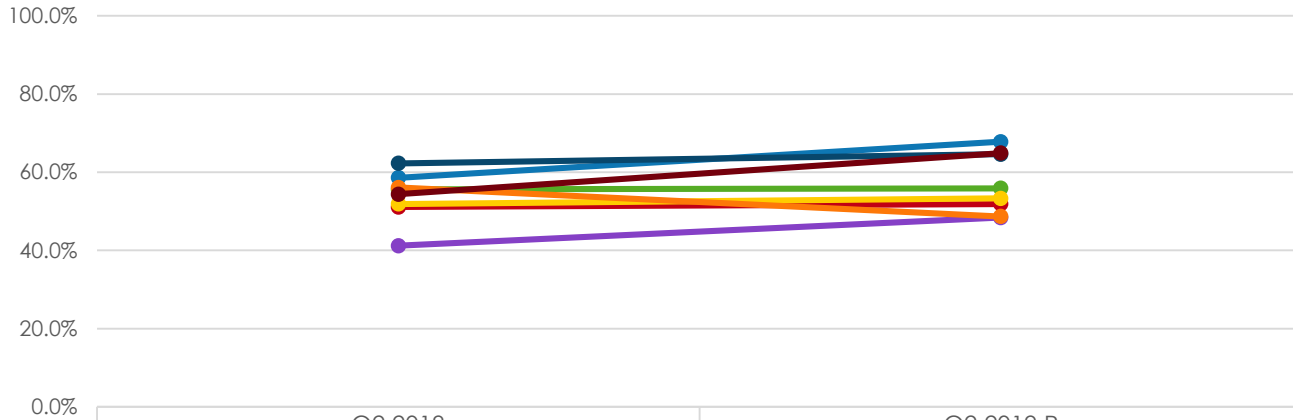
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	67.8%	51.9%	55.9%	53.3%	48.4%	48.7%	64.6%	64.9%
■ Somewhat likely (5-6)	18.3%	24.7%	25.6%	28.4%	21.7%	29.0%	26.2%	27.3%
■ Somewhat unlikely (3-4)	6.4%	10.5%	5.8%	8.9%	13.3%	12.7%	9.2%	5.1%
■ Very unlikely (1-2)	6.1%	10.1%	2.1%	7.5%	11.5%	7.8%	0.0%	1.6%
■ Not sure	1.4%	2.8%	10.5%	1.9%	5.0%	2.0%	0.0%	1.1%
BASE	855	1,216	882	426	190	512	51	198
▲ MEAN	6.74	6.07	6.73	6.25	5.90	6.04	6.88	6.79

LIKELIHOOD OF RETURN VISIT – O‘AHU

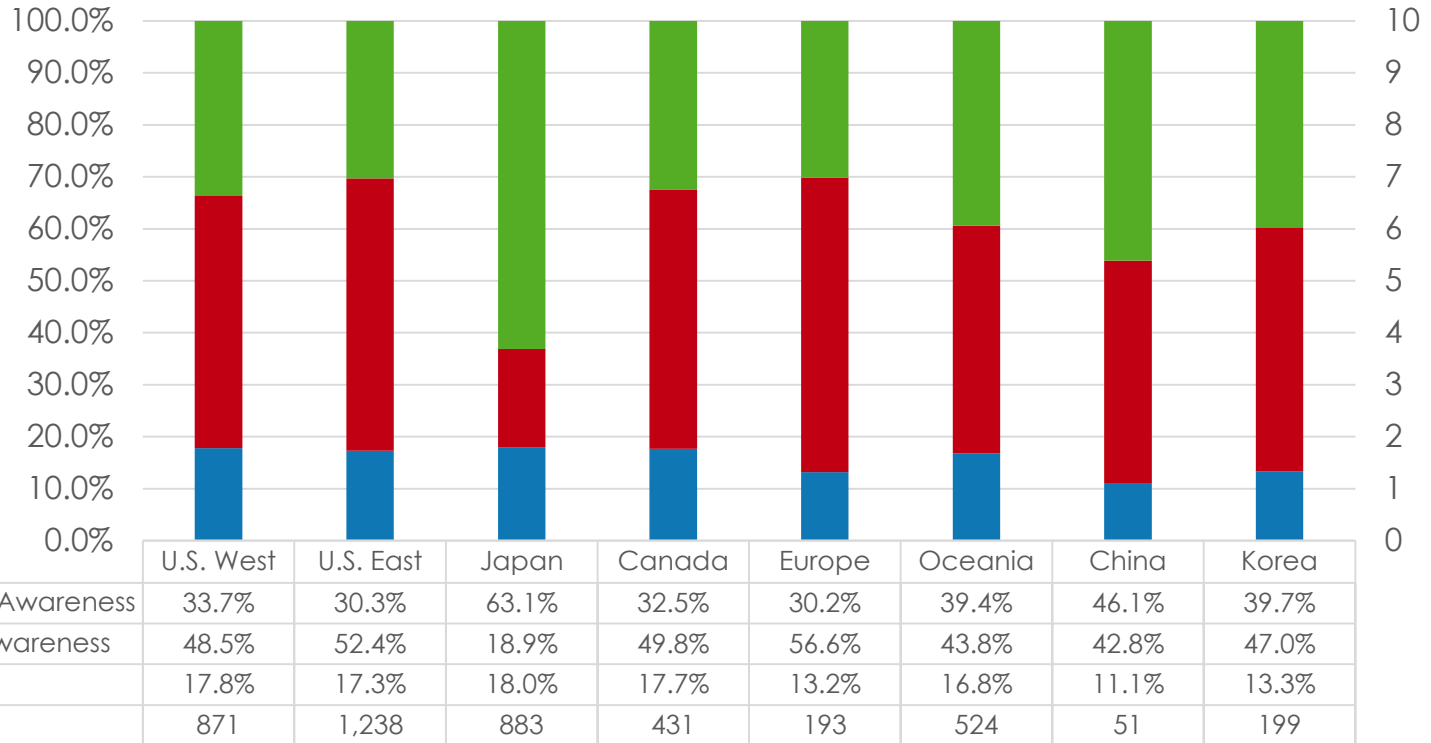
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019 P
U.S. West	58.6%	67.8%
U.S. East	51.1%	51.9%
Japan	55.6%	55.9%
Canada	51.9%	53.3%
Europe	41.2%	48.4%
Oceania	56.1%	48.7%
China	62.3%	64.6%
Korea	54.4%	64.9%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Atlantis Submarine & Cruises	3.3%	4.8%	11.1%	2.9%	4.8%	6.1%	31.7%	8.9%
Bernice P. Bishop Museum	3.8%	3.8%	2.6%	2.8%	3.5%	1.6%	1.8%	0.5%
Byodo-In Temple	7.7%	9.8%	0.8%	11.2%	11.8%	6.6%	10.0%	0.5%
Chinatown & Honolulu Art District	11.1%	13.5%	21.2%	17.0%	23.3%	8.9%	48.3%	12.2%
Diamond Head State Monument	26.5%	42.1%	23.4%	52.4%	41.9%	35.6%	18.4%	39.8%
Dole Plantation	34.9%	41.3%	15.0%	37.6%	32.4%	27.2%	41.0%	39.1%
Haleiwa	26.1%	24.7%	27.0%	25.7%	24.7%	12.1%	17.3%	20.3%
Hanauma Bay Nature Reserve	20.6%	24.0%	19.8%	35.9%	25.1%	16.8%	59.4%	34.8%
Harold L. Lyon Arboretum	0.8%	1.2%	0.9%	0.7%	1.1%	0.2%	0.0%	4.4%
Hawaii State Art Museum or Honolulu Museum of Art	2.5%	2.5%	3.1%	3.5%	3.2%	2.3%	8.9%	0.5%
Hawaiian Mission Houses, Historic Site and Archive	1.6%	1.6%	0.2%	1.9%	2.1%	2.1%	0.0%	2.5%
Hawaii's Plantation Village	1.9%	1.8%	2.1%	2.1%	5.3%	2.1%	3.7%	3.3%
Honolulu Zoo	6.0%	8.5%	6.4%	9.7%	11.7%	7.5%	7.0%	10.8%

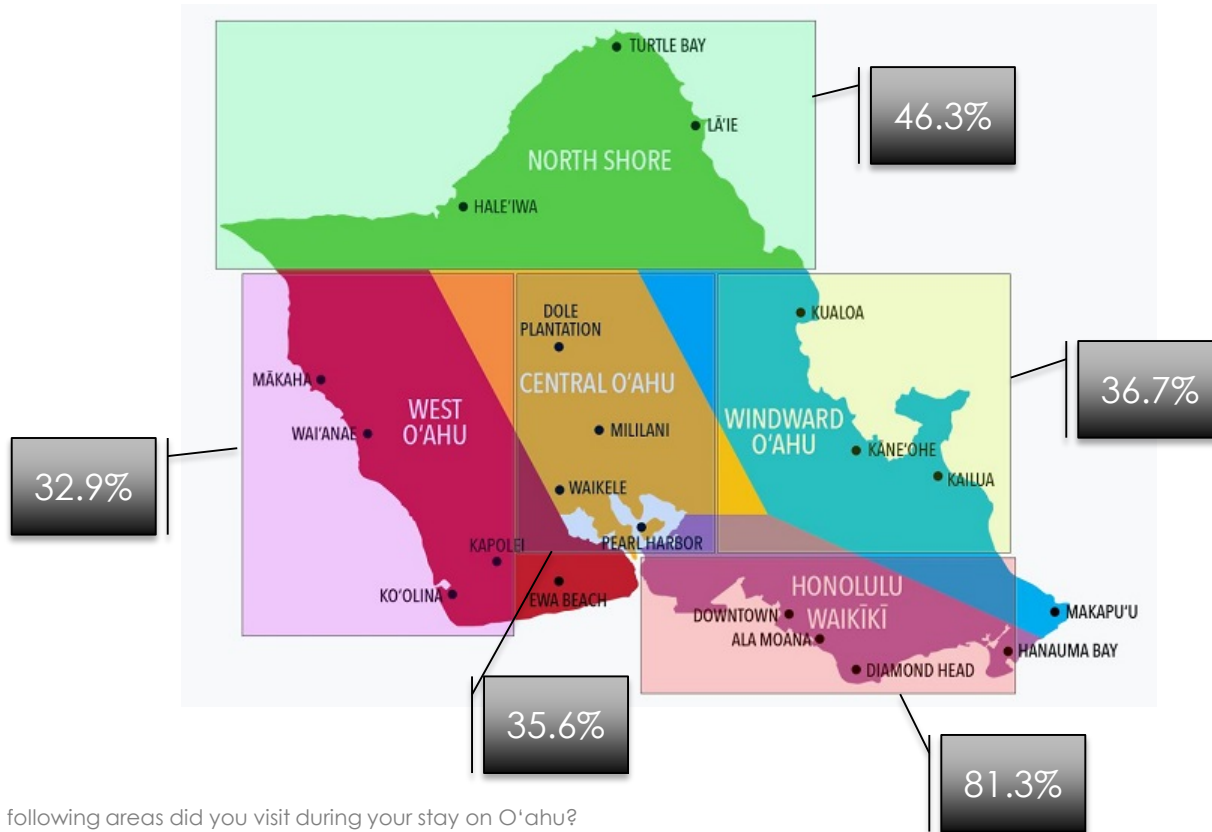
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Ho‘omaluhia Botanical Garden	4.9%	4.9%	1.6%	7.9%	7.0%	1.7%	4.4%	4.9%
Iolani Palace State Monument	4.6%	10.1%	13.9%	11.1%	20.9%	7.6%	16.6%	16.4%
Kaiwi State Scenic Shoreline/ Makapuu Trail	4.3%	8.5%	5.8%	9.5%	9.7%	2.0%	9.2%	2.1%
Kakaako Street Art	1.9%	2.3%	17.1%	2.1%	4.3%	0.8%	12.6%	6.4%
Koko Head Crater Trail	6.7%	9.8%	4.9%	14.9%	12.5%	4.4%	8.9%	7.4%
Kualoa Private Nature Reserve	10.2%	12.7%	7.9%	17.9%	18.4%	9.9%	31.3%	11.9%
Lanikai or Kailua Beach	31.1%	31.1%	24.5%	37.7%	32.4%	13.8%	29.5%	26.1%
Manoa Falls & Trail	13.1%	16.5%	3.5%	21.8%	19.8%	2.7%	3.7%	2.5%
National Memorial Cemetery of the Pacific	7.8%	18.2%	1.7%	9.2%	17.2%	12.6%	13.7%	1.9%
Nuuanu Pali Lookout	5.9%	9.5%	4.2%	12.4%	8.2%	5.2%	29.9%	6.9%
North Shore Beaches	53.1%	55.1%	17.2%	55.2%	48.6%	38.8%	26.6%	28.1%

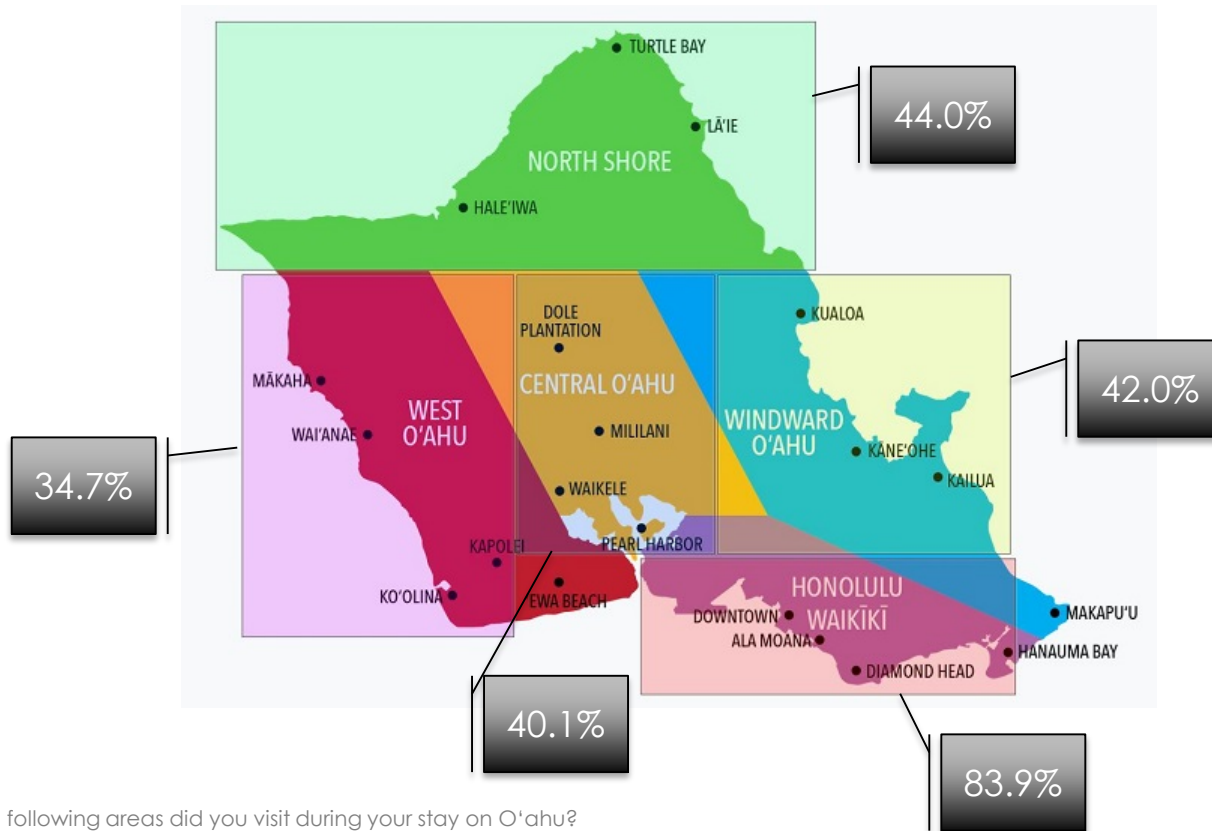
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pearl Harbor	31.0%	52.6%	11.6%	39.2%	61.4%	47.1%	58.3%	17.2%
Polynesian Cultural Center	18.6%	21.4%	3.5%	21.0%	12.3%	11.9%	20.3%	15.5%
Queen Emma’s Summer Palace	1.9%	3.1%	2.1%	1.6%	6.4%	3.0%	3.7%	1.9%
Sea Life Park Hawaii	4.4%	5.9%	4.2%	5.7%	5.0%	2.6%	0.0%	1.1%
Waikiki Aquarium	6.4%	6.9%	6.0%	7.3%	4.8%	4.4%	0.0%	3.9%
Waimanalo Beach Park	10.4%	14.3%	5.9%	21.3%	15.5%	7.4%	5.5%	9.6%
Waimea Valley	20.3%	22.3%	3.9%	21.3%	23.8%	12.4%	3.7%	5.0%

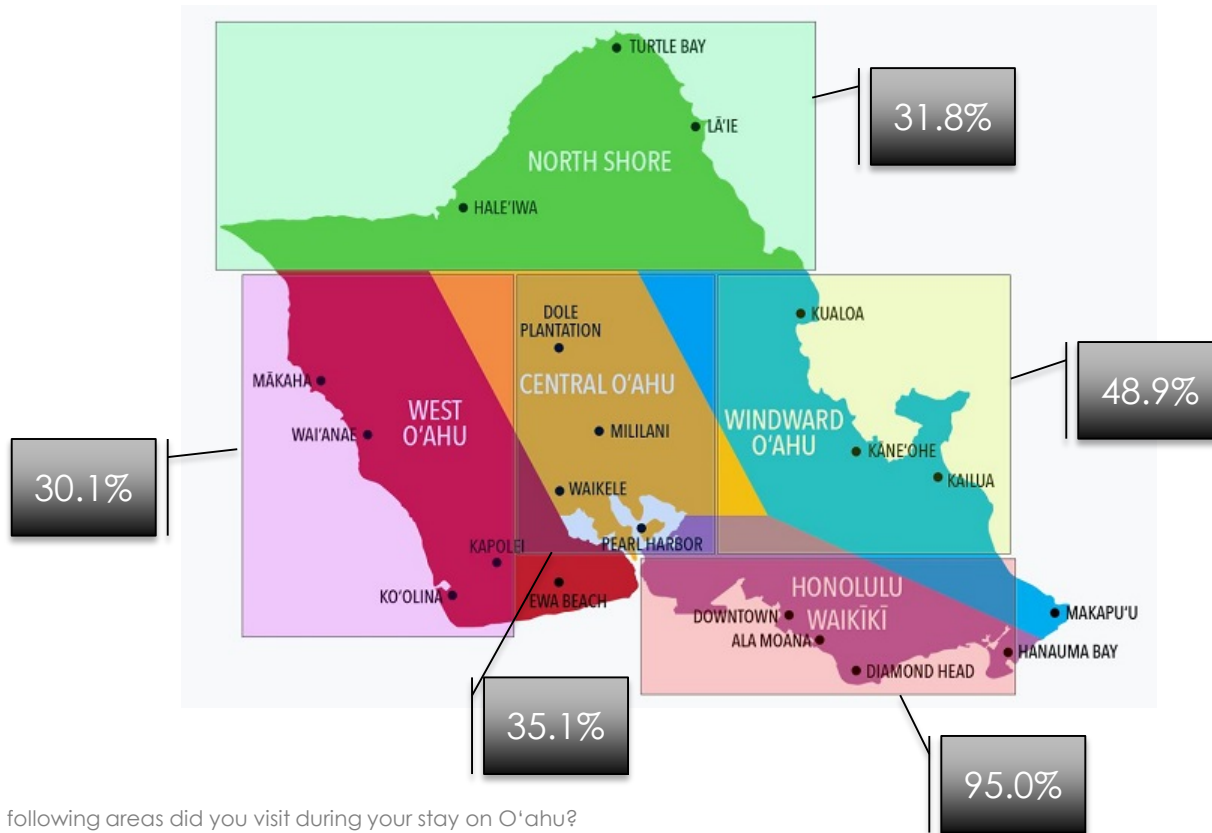
AREAS VISITED U.S. WEST



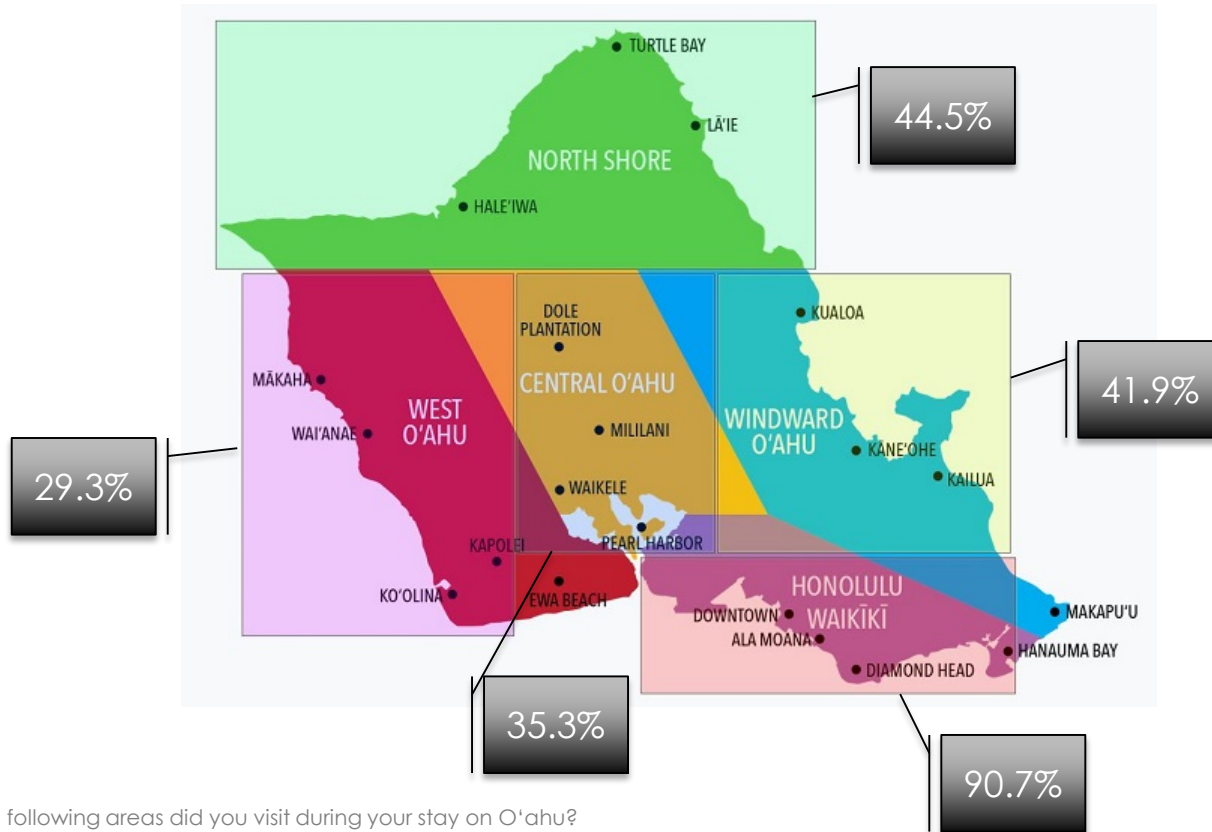
AREAS VISITED U.S. EAST



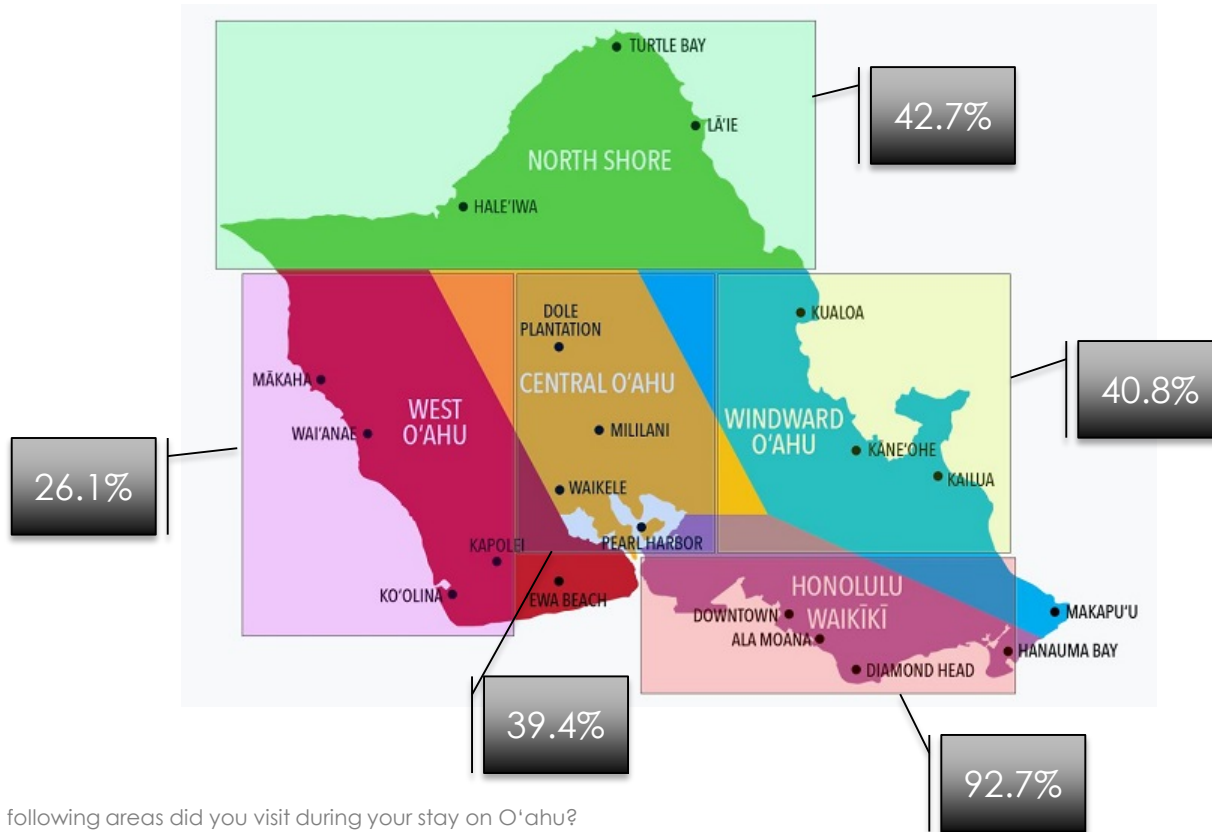
AREAS VISITED JAPAN



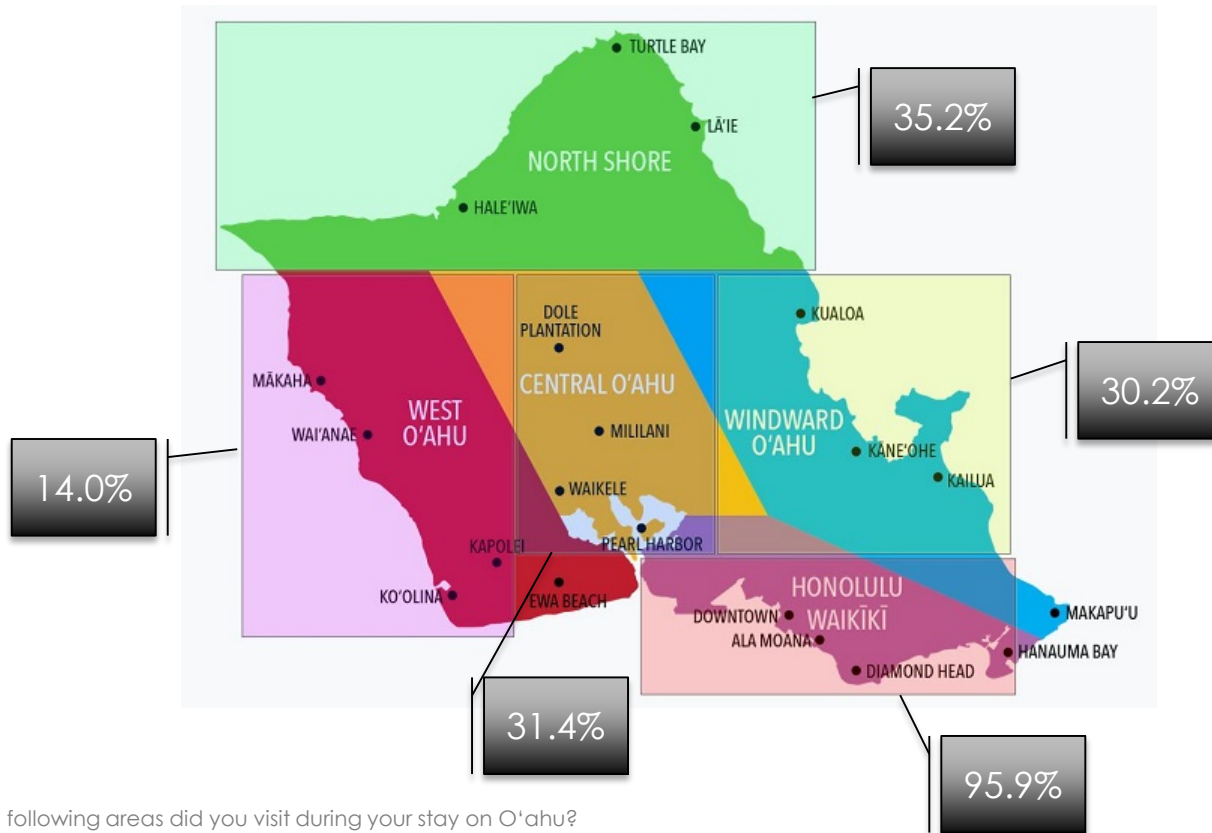
AREAS VISITED CANADA



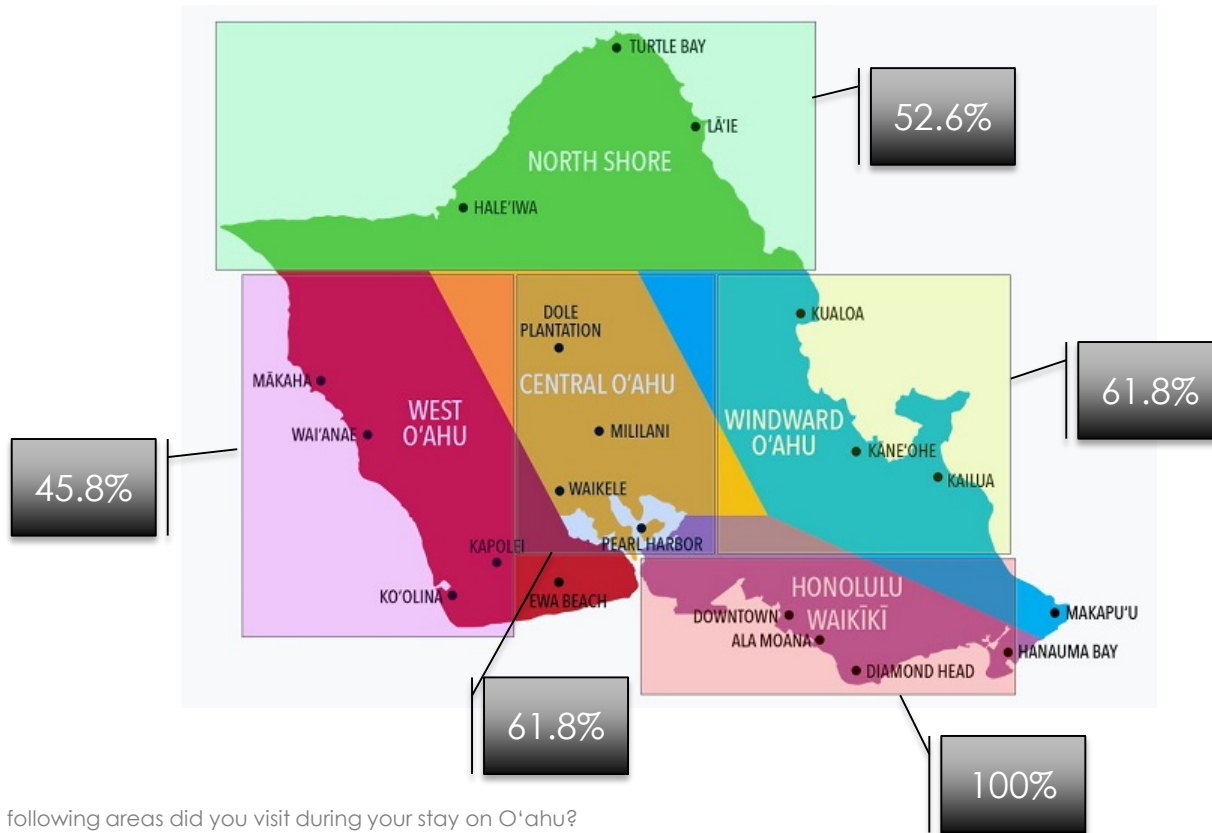
AREAS VISITED EUROPE



AREAS VISITED OCEANIA

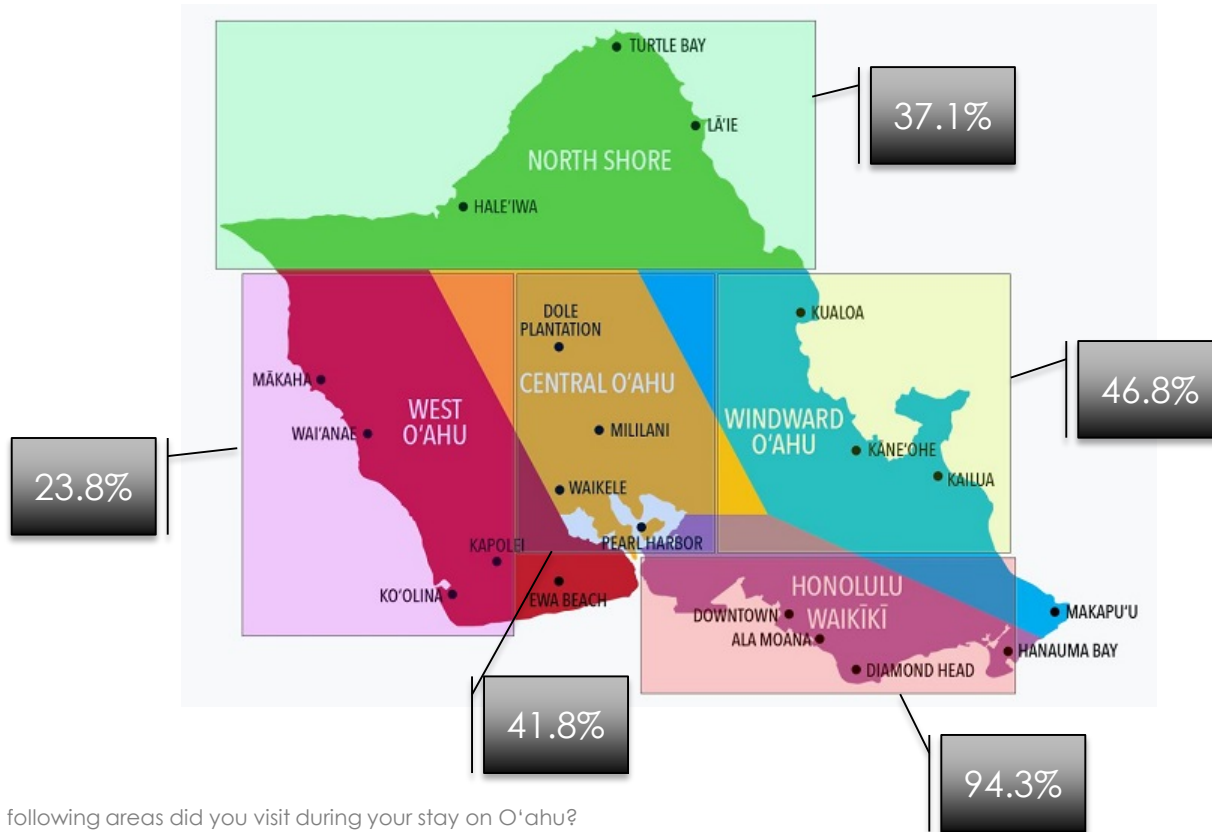


AREAS VISITED CHINA



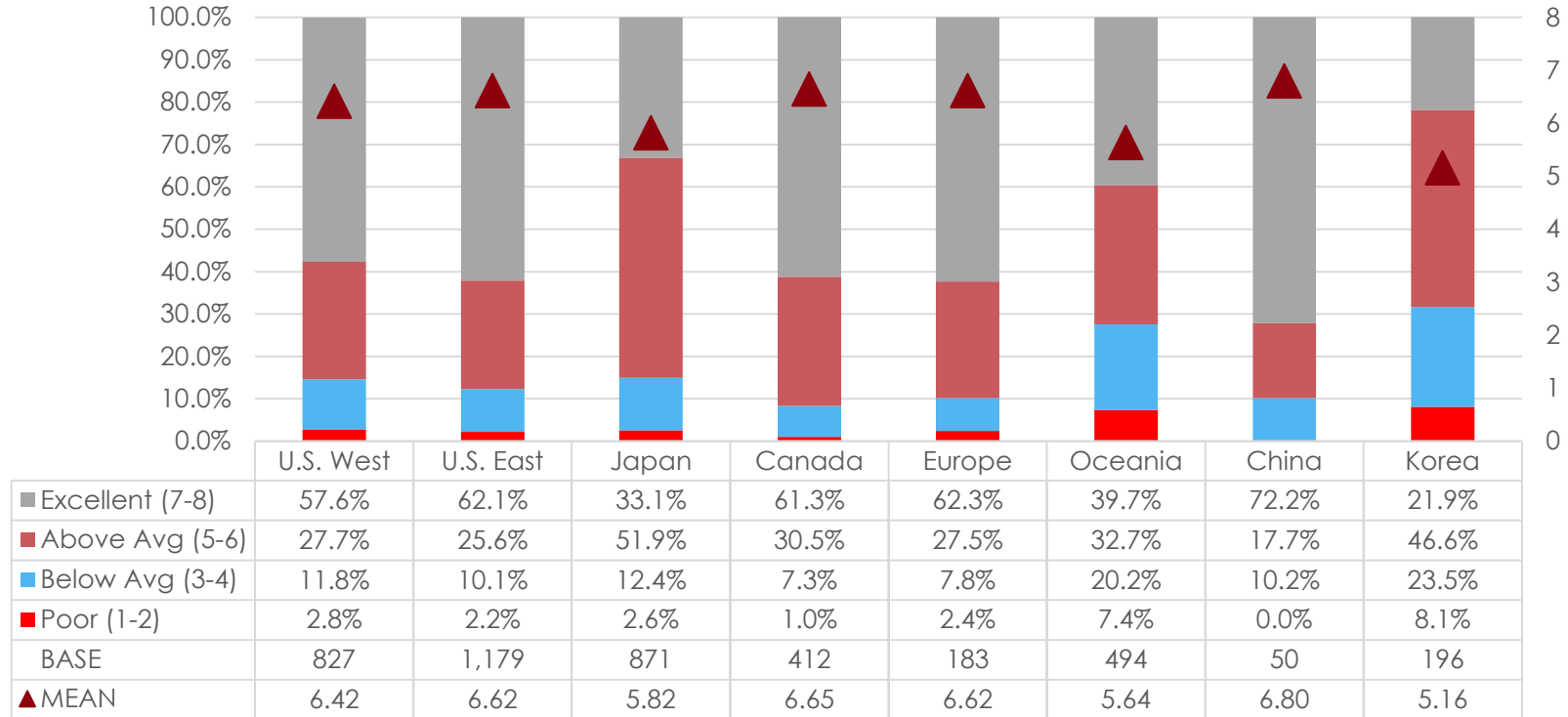
61 Q Which of the following areas did you visit during your stay on O'ahu?

AREAS VISITED KOREA



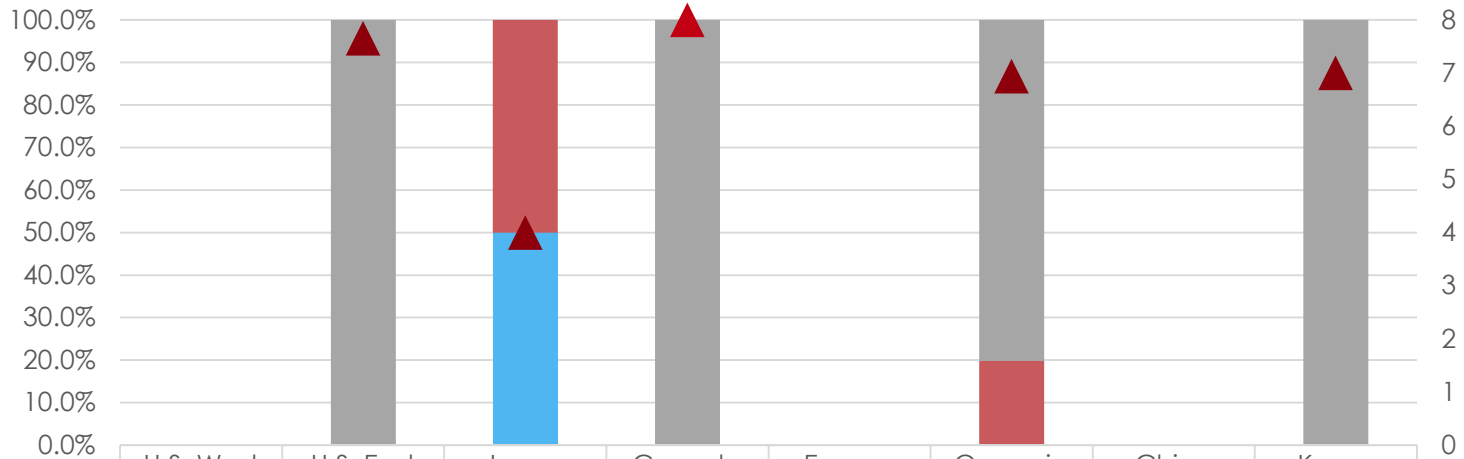
SATISFACTION – Daniel K. Inouye International Airport

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



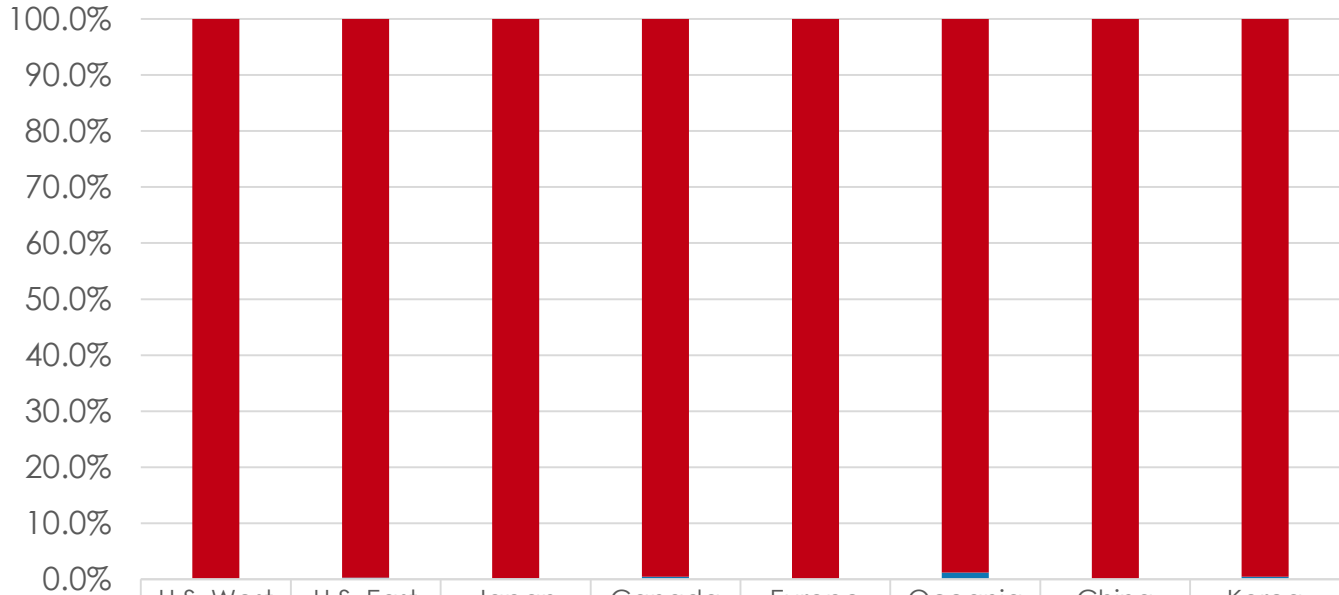
SATISFACTION – Honolulu Harbor

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	0.0%	100.0%	0.0%	100.0%	0.0%	80.2%	0.0%	100.0%
■ Above Avg (5-6)	0.0%	0.0%	50.0%	0.0%	0.0%	19.8%	0.0%	0.0%
■ Below Avg (3-4)	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%
■ Poor (1-2)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	0	3	2	2	0	6	0	1
▲ MEAN	0.00	7.65	4.00	8.00	0.00	6.94	0.00	7.00

TRANSPAC TRAVEL OPTIONS – O‘AHU

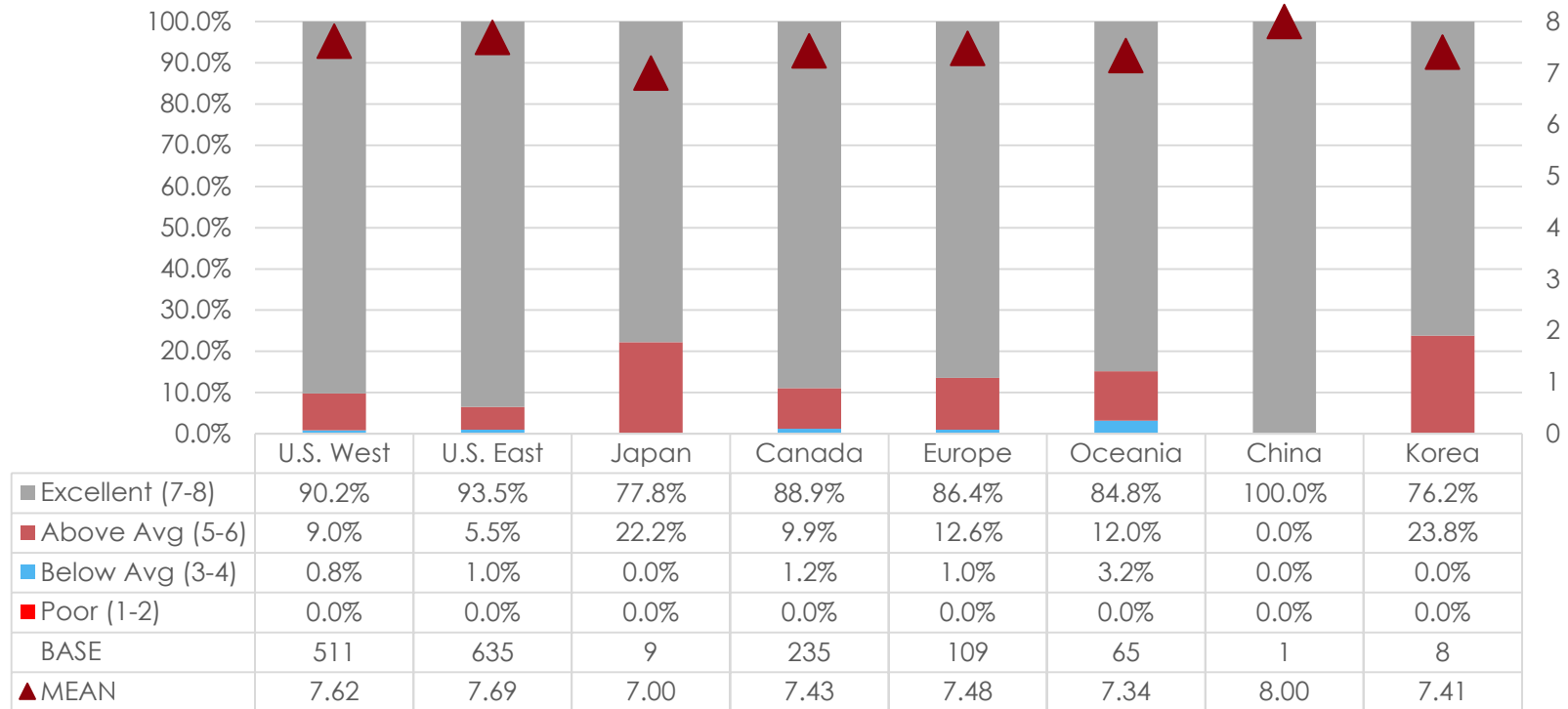


■ Air/ Flight	100.0%	99.7%	99.8%	99.5%	100.0%	98.8%	100.0%	99.5%
■ Cruise Ship/ Ocean Vessel	0.0%	0.3%	0.2%	0.5%	0.0%	1.2%	0.0%	0.5%
BASE	828	1188	873	414	183	500	50	197

SECTION – KAUA‘I

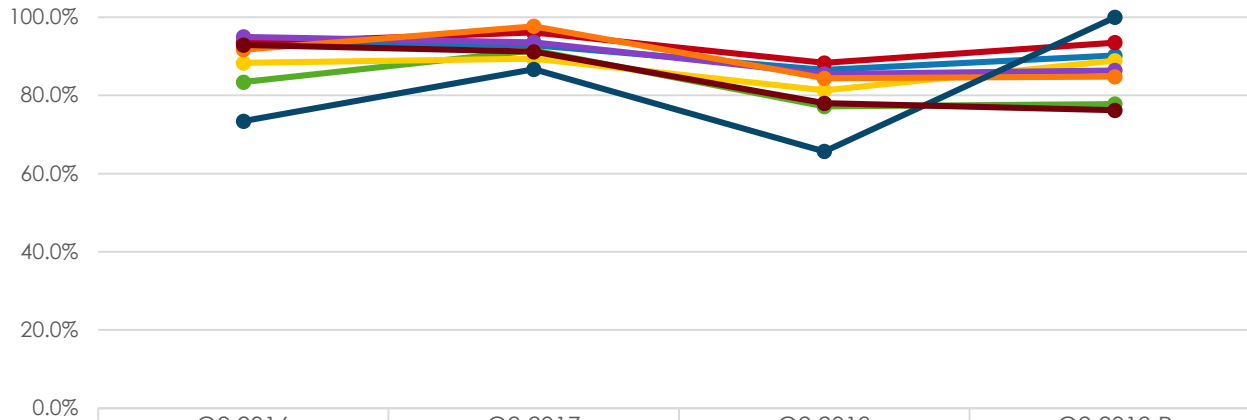
SATISFACTION – KAUA‘I

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



SATISFACTION – KAUA‘I

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

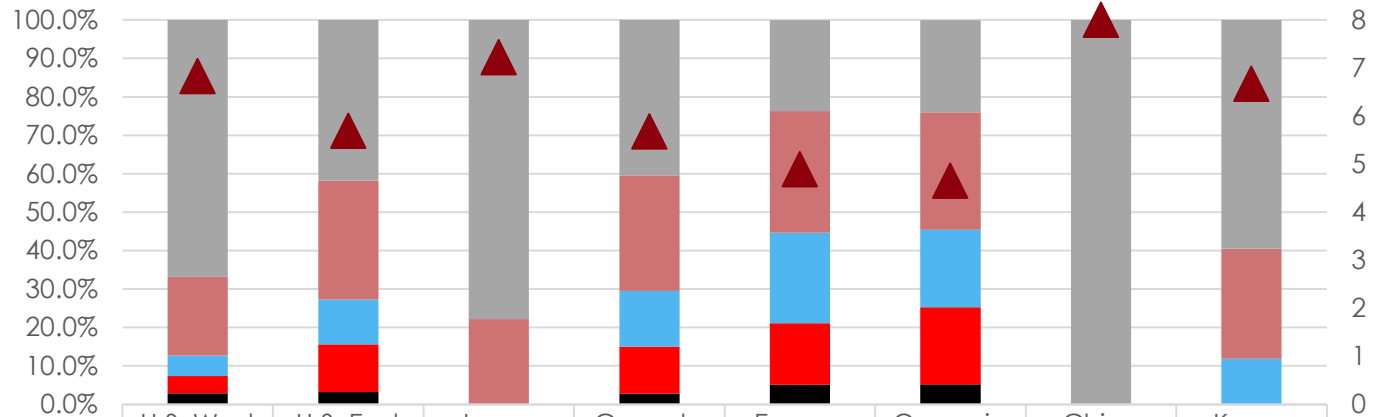


	Q2 2016	Q2 2017	Q2 2018	Q2 2019 P
U.S. West	93.6%	92.8%	86.5%	90.2%
U.S. East	93.5%	96.1%	88.3%	93.5%
Japan	83.4%	91.5%	77.2%	77.8%
Canada	88.3%	89.4%	81.3%	88.9%
Europe	95.0%	93.6%	85.5%	86.4%
Oceania	91.7%	97.7%	84.4%	84.8%
China	73.4%	86.7%	65.7%	100.0%
Korea	92.9%	91.2%	78.0%	76.2%

P= Preliminary Data

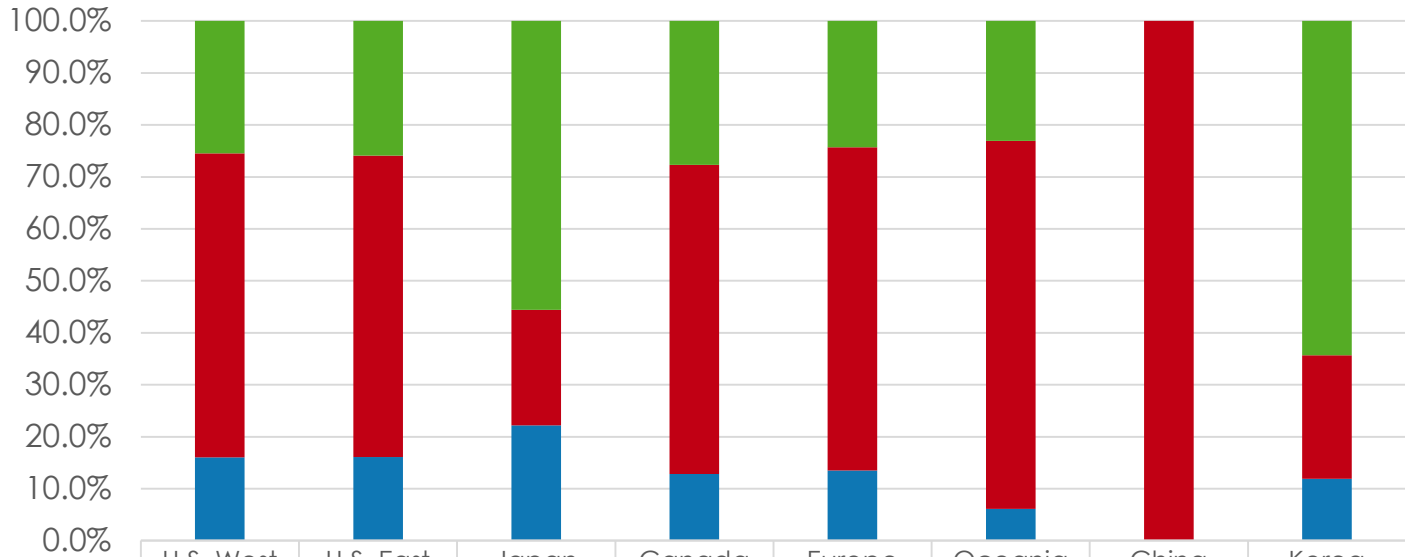
LIKELIHOOD OF RETURN VISIT – KAUA‘I

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)	66.8%	41.9%	77.8%	40.4%	23.6%	23.9%	100.0%	59.5%
Somewhat likely (5-6)	20.5%	30.9%	22.2%	30.1%	31.6%	30.6%	0.0%	28.6%
Somewhat unlikely (3-4)	5.3%	11.7%	0.0%	14.5%	23.6%	20.1%	0.0%	11.9%
Very unlikely (1-2)	4.5%	12.4%	0.0%	12.2%	16.0%	20.1%	0.0%	0.0%
Not sure	2.9%	3.2%	0.0%	2.8%	5.1%	5.2%	0.0%	0.0%
BASE	487	571	9	223	102	55	1	8
MEAN	6.83	5.69	7.22	5.68	4.89	4.65	8.00	6.67

AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	25.5%	25.9%	55.6%	27.7%	24.3%	23.2%	0.0%	64.3%
No Prior Awareness	58.5%	58.0%	22.2%	59.5%	62.2%	70.8%	100.0%	23.8%
Unsure	16.0%	16.1%	22.2%	12.8%	13.5%	6.1%	0.0%	11.9%
BASE	495	578	9	227	104	55	1	8

ATTRACTIONS – KAUA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Fern Grotto	11.5%	13.5%	33.3%	11.2%	9.0%	19.3%	0.0%	11.9%
Hanalei Town	55.9%	43.9%	33.3%	50.5%	54.6%	41.1%	0.0%	11.9%
Hanalei Beach	50.3%	41.5%	33.3%	50.8%	54.2%	32.8%	100.0%	11.9%
Kalalau Trail	7.0%	8.6%	0.0%	14.8%	18.1%	5.2%	0.0%	11.9%
Kalapaki Beach	25.8%	25.6%	22.2%	29.5%	24.4%	12.7%	100.0%	0.0%
Bike Path in Kapaa	12.4%	7.4%	0.0%	10.1%	5.8%	5.2%	0.0%	11.9%
Kaua'i Museum	5.4%	2.5%	11.1%	1.7%	3.5%	0.0%	100.0%	0.0%
Ke'e Beach	7.4%	4.3%	0.0%	7.2%	7.6%	2.2%	0.0%	0.0%
Kilauea Lighthouse	36.1%	32.9%	11.1%	30.6%	35.3%	25.4%	100.0%	11.9%
Koke'e	8.5%	9.9%	0.0%	14.9%	24.4%	3.0%	0.0%	0.0%

ATTRACTIONS – KAUA‘I (cont.)

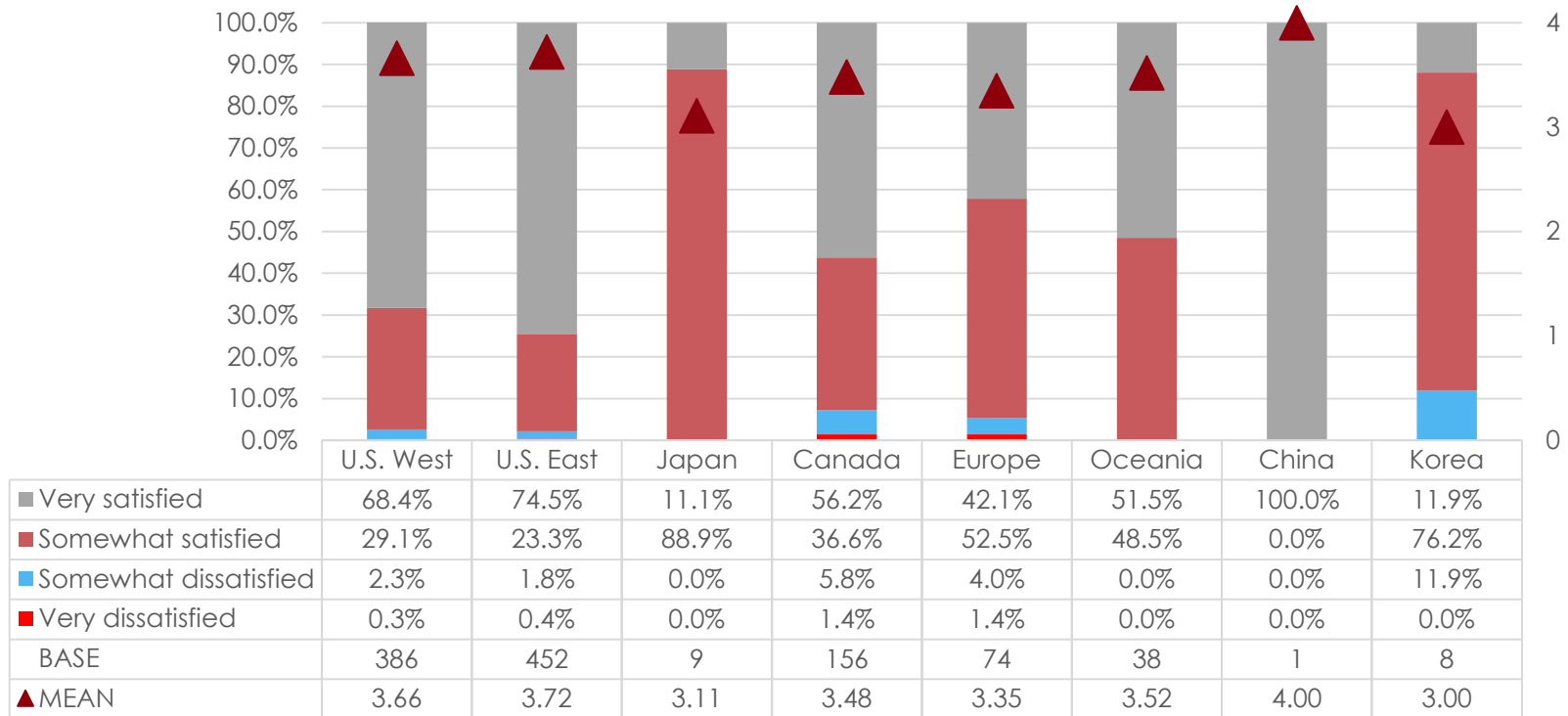
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Koke'e Museum	3.9%	3.2%	0.0%	4.5%	7.8%	1.5%	0.0%	0.0%
Na Aina Kai Gardens	2.5%	1.4%	0.0%	0.5%	1.0%	0.0%	0.0%	0.0%
Napali Coast	44.7%	56.4%	11.1%	48.8%	54.0%	41.1%	100.0%	28.6%
Allerton Garden	10.5%	9.5%	11.1%	7.6%	16.2%	3.0%	100.0%	0.0%
Limahuli Garden	2.5%	3.5%	0.0%	3.1%	6.2%	1.5%	0.0%	0.0%
Old Koloa Town	43.6%	28.9%	0.0%	32.4%	32.7%	24.7%	100.0%	0.0%
Opaeka'a Falls	29.9%	31.2%	22.2%	35.0%	39.8%	24.6%	0.0%	0.0%
Po'ipu Beach	67.2%	48.4%	44.4%	57.8%	54.4%	32.1%	0.0%	40.5%
Smith's Tropical Paradise Gardens	11.9%	10.5%	0.0%	4.6%	7.6%	2.2%	0.0%	0.0%
Spouting Horn	42.9%	38.6%	0.0%	44.2%	38.6%	23.9%	0.0%	11.9%
Wailua Falls	43.8%	44.1%	33.3%	50.2%	58.9%	29.1%	0.0%	35.7%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wailua River	30.9%	25.8%	22.2%	27.5%	31.4%	25.4%	0.0%	0.0%
Waimea Canyon	53.5%	62.6%	66.7%	66.2%	72.7%	51.6%	100.0%	52.4%
Disc Golf	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mini Golf	2.7%	1.9%	0.0%	4.9%	0.8%	2.2%	0.0%	0.0%

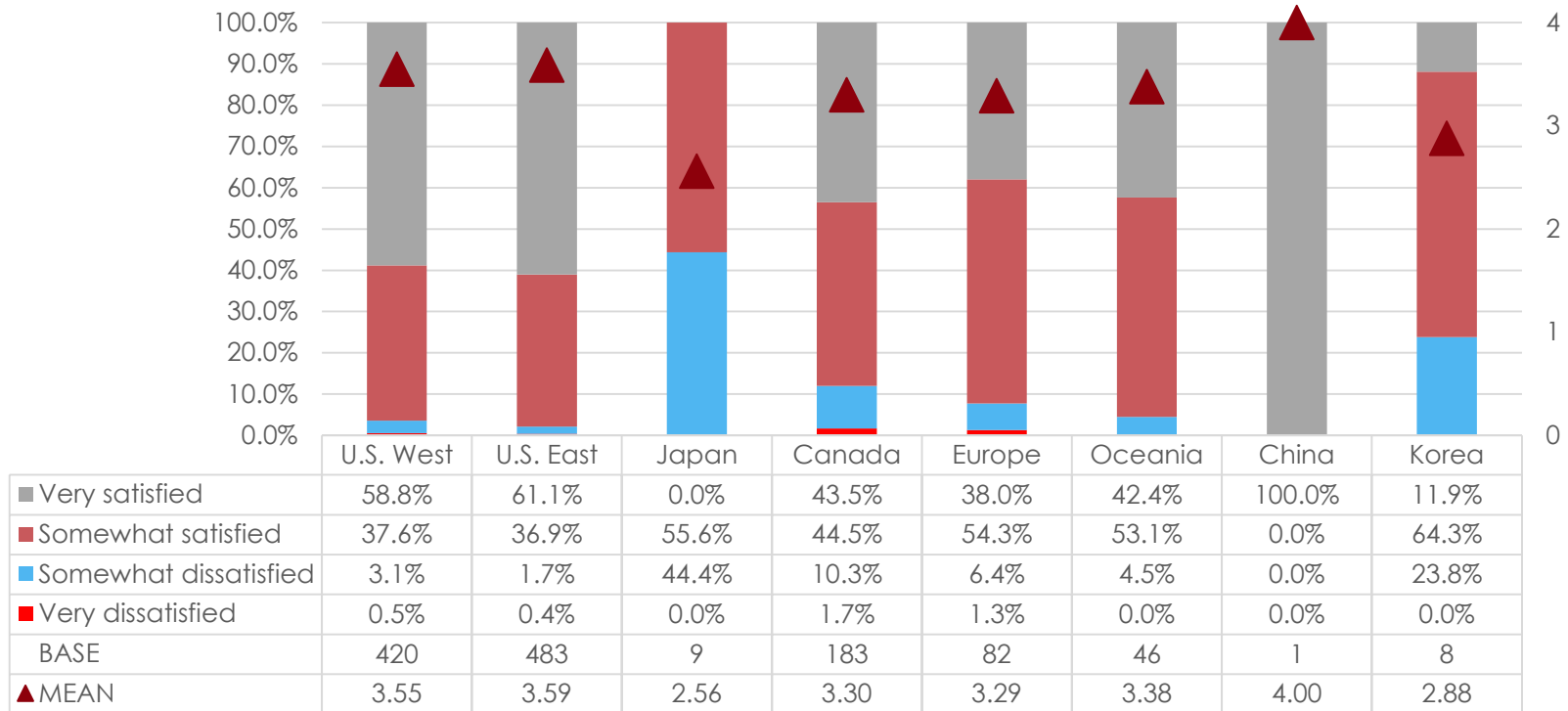
SATISFACTION – ENTERTAINMENT

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



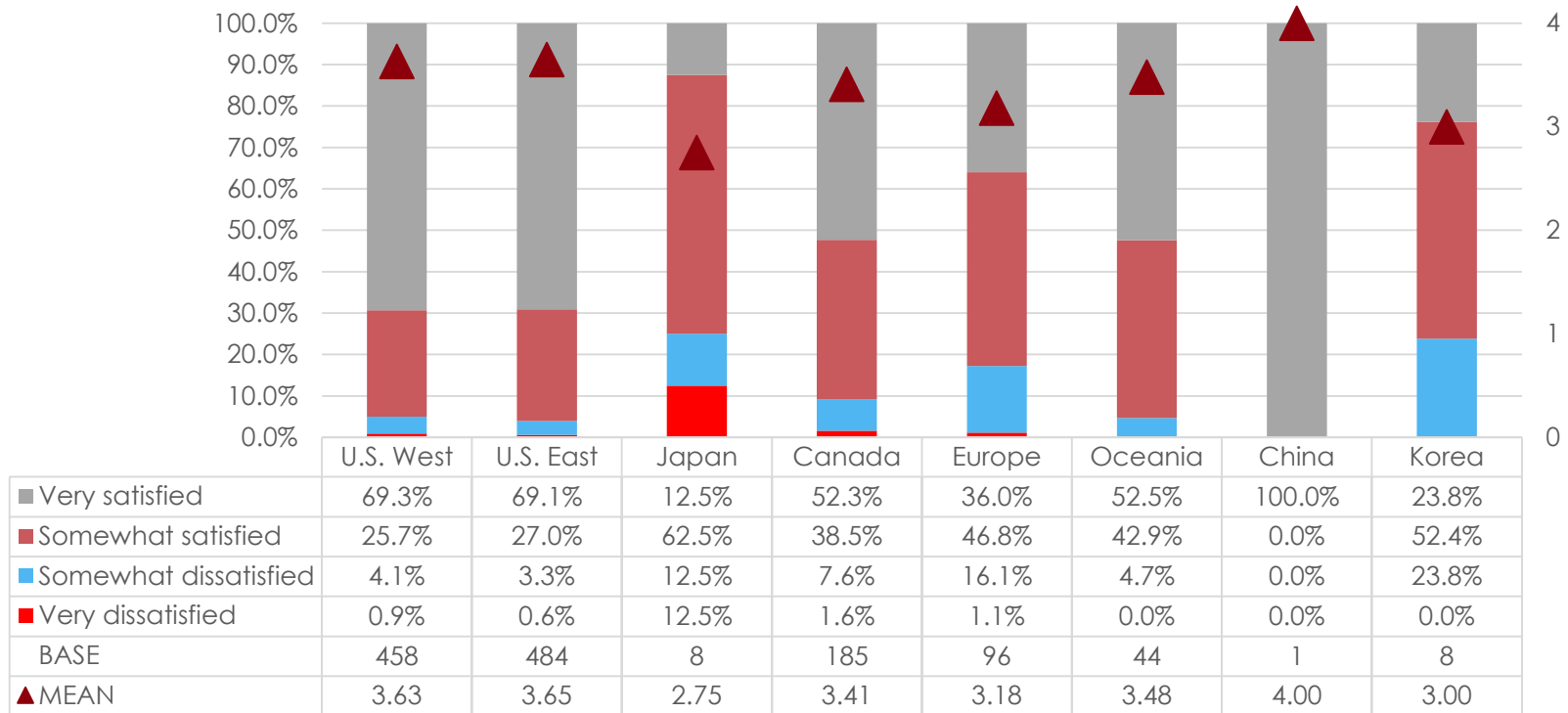
SATISFACTION – SHOPPING

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



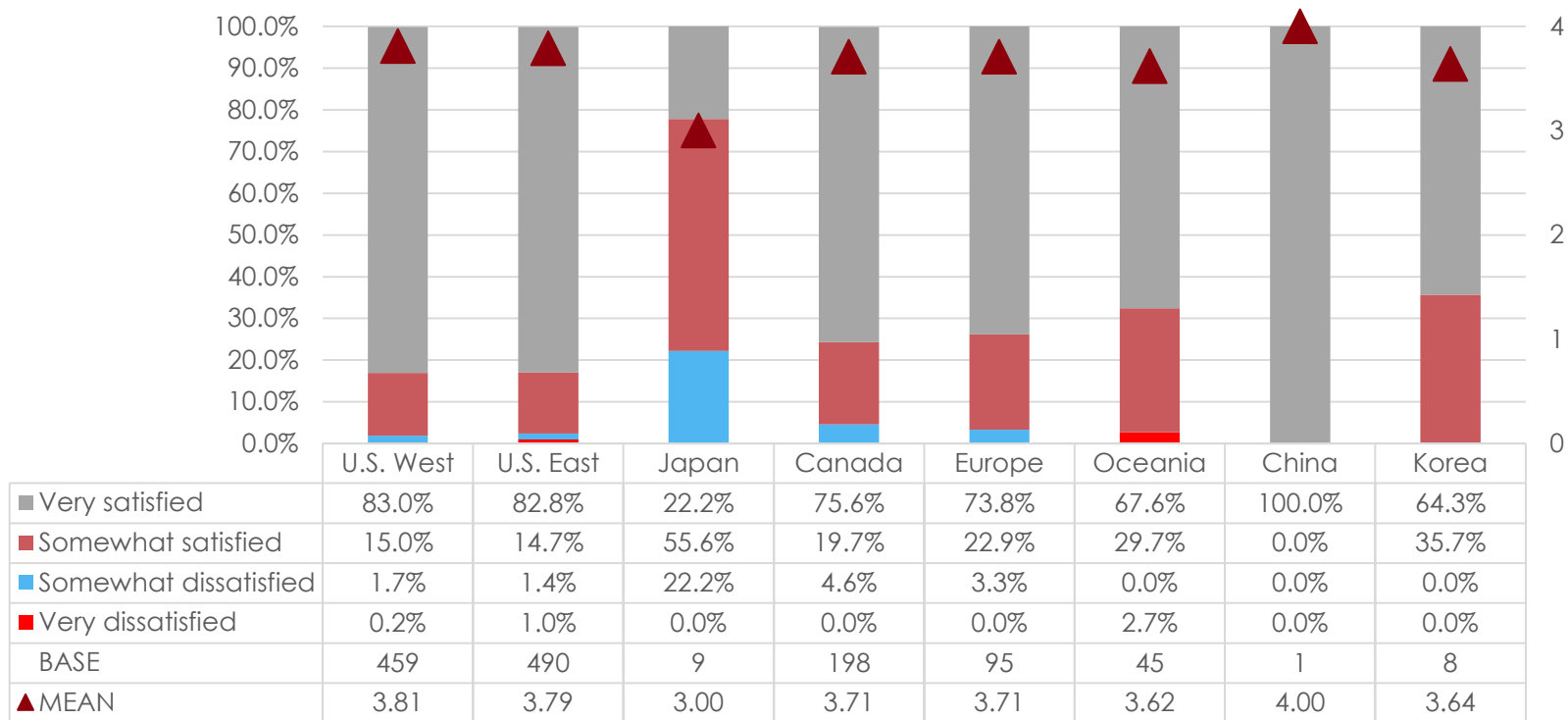
SATISFACTION – DINING

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



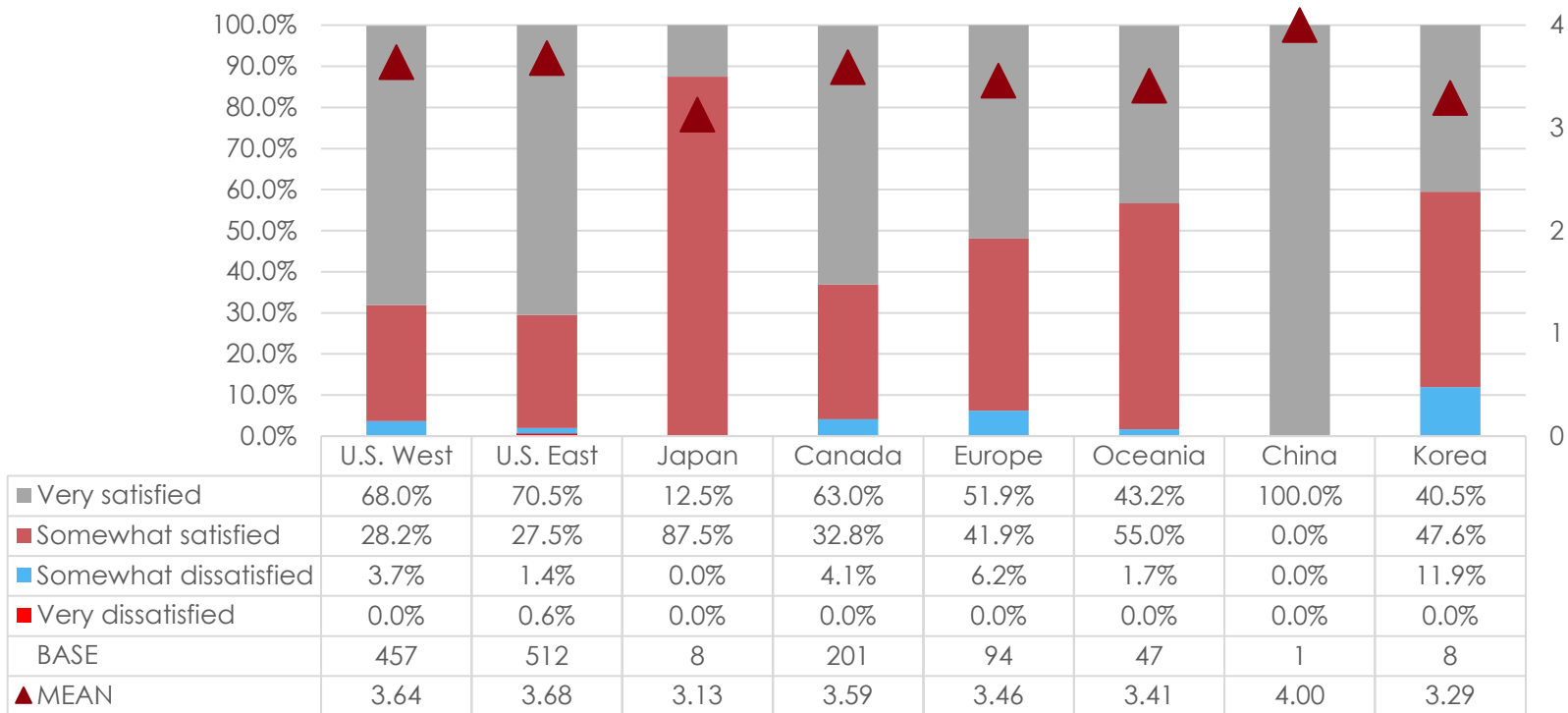
SATISFACTION – BEACHES

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



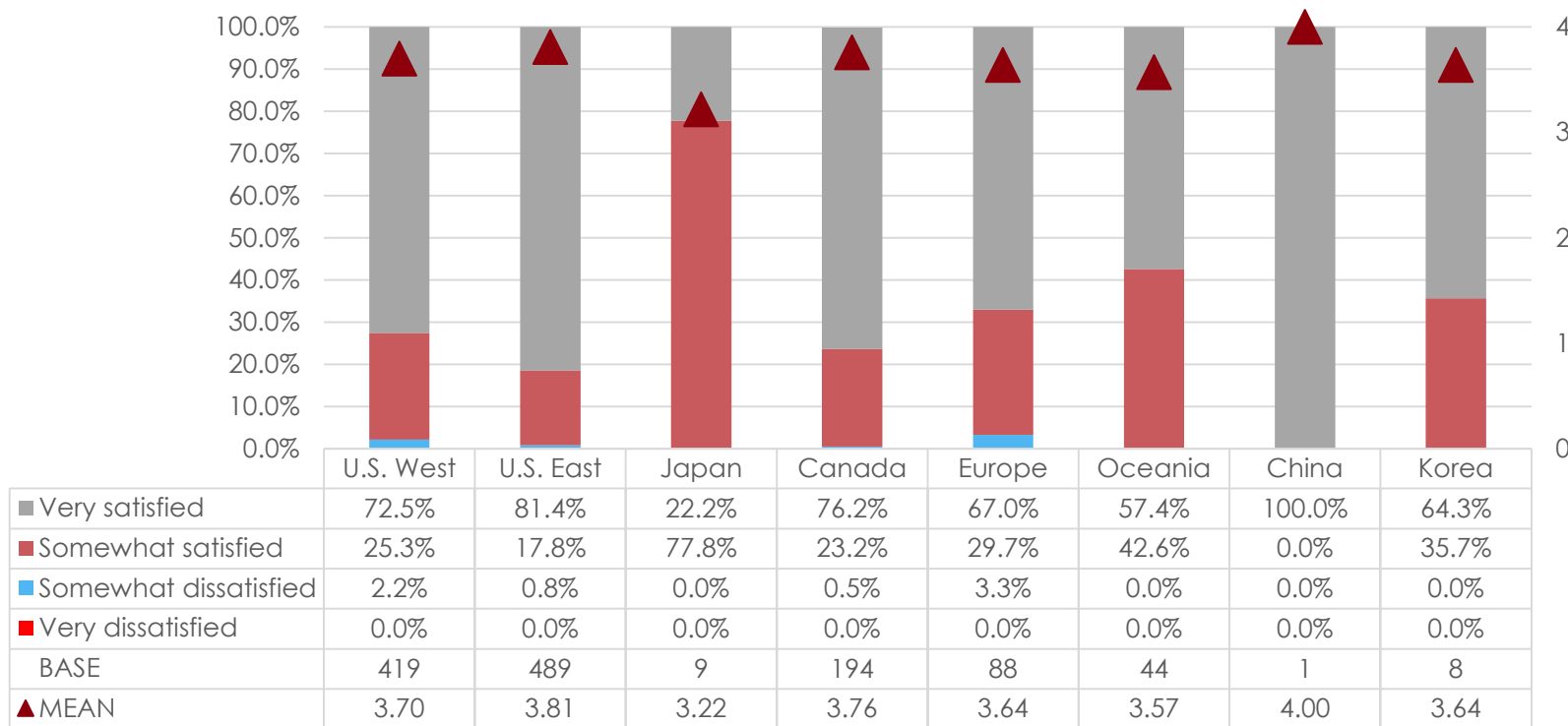
SATISFACTION – PUBLIC AREAS

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



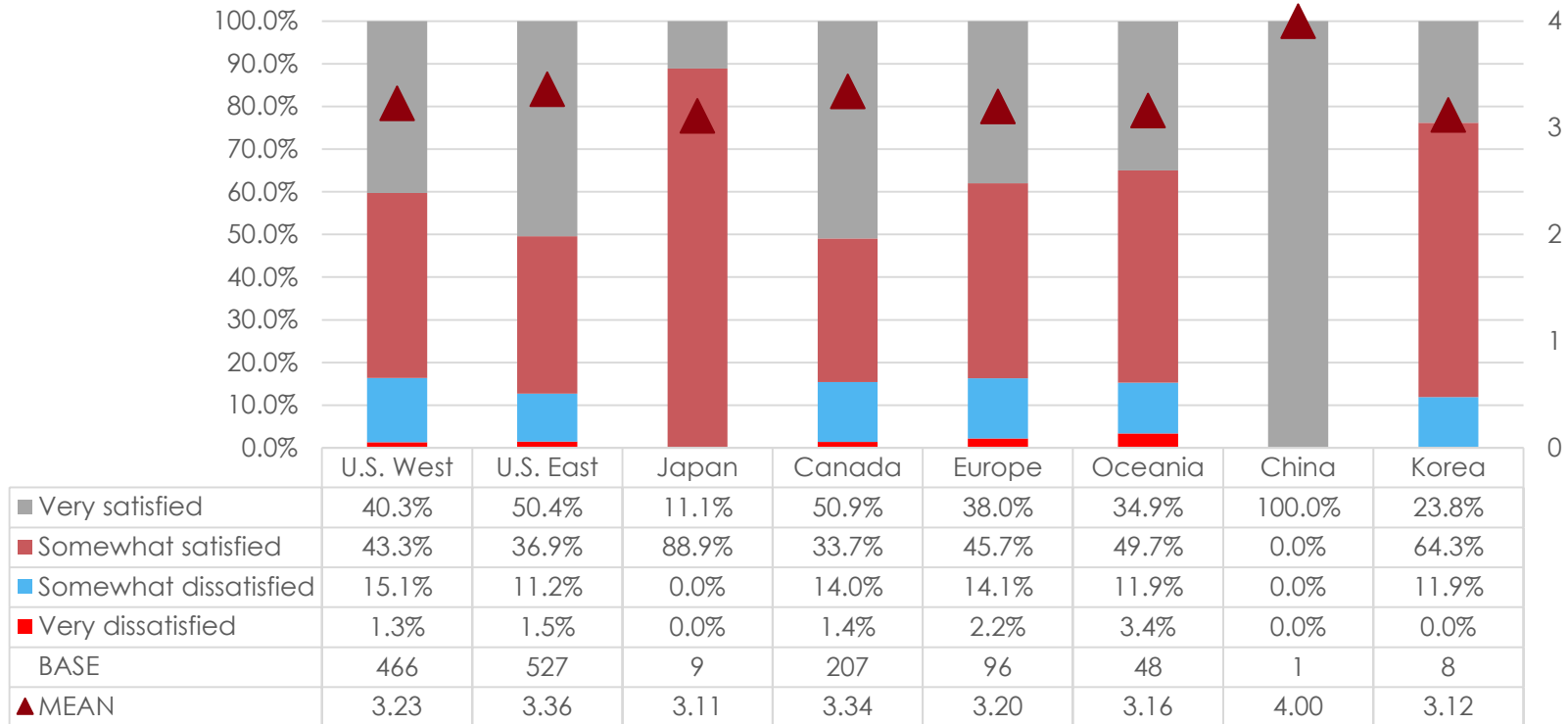
SATISFACTION – PARKS

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



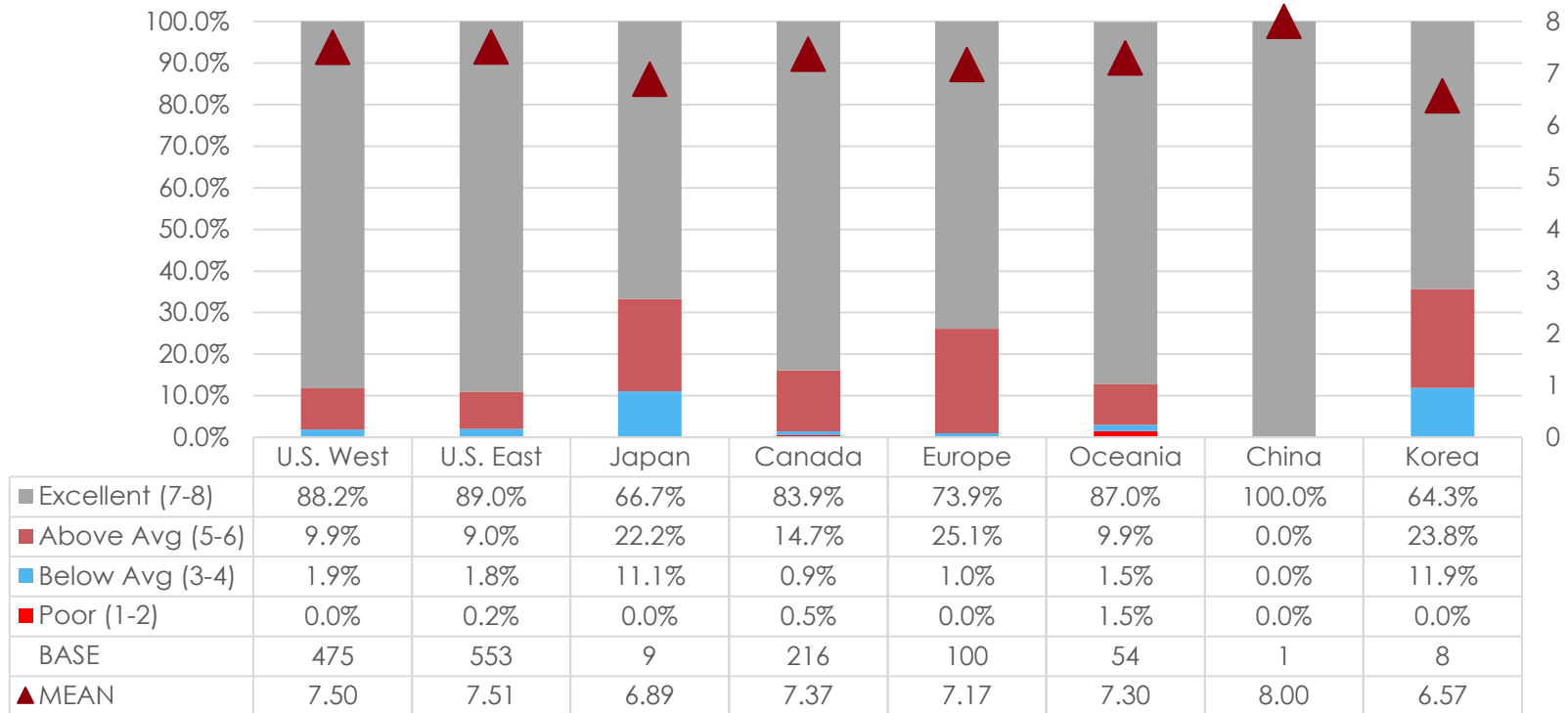
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

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



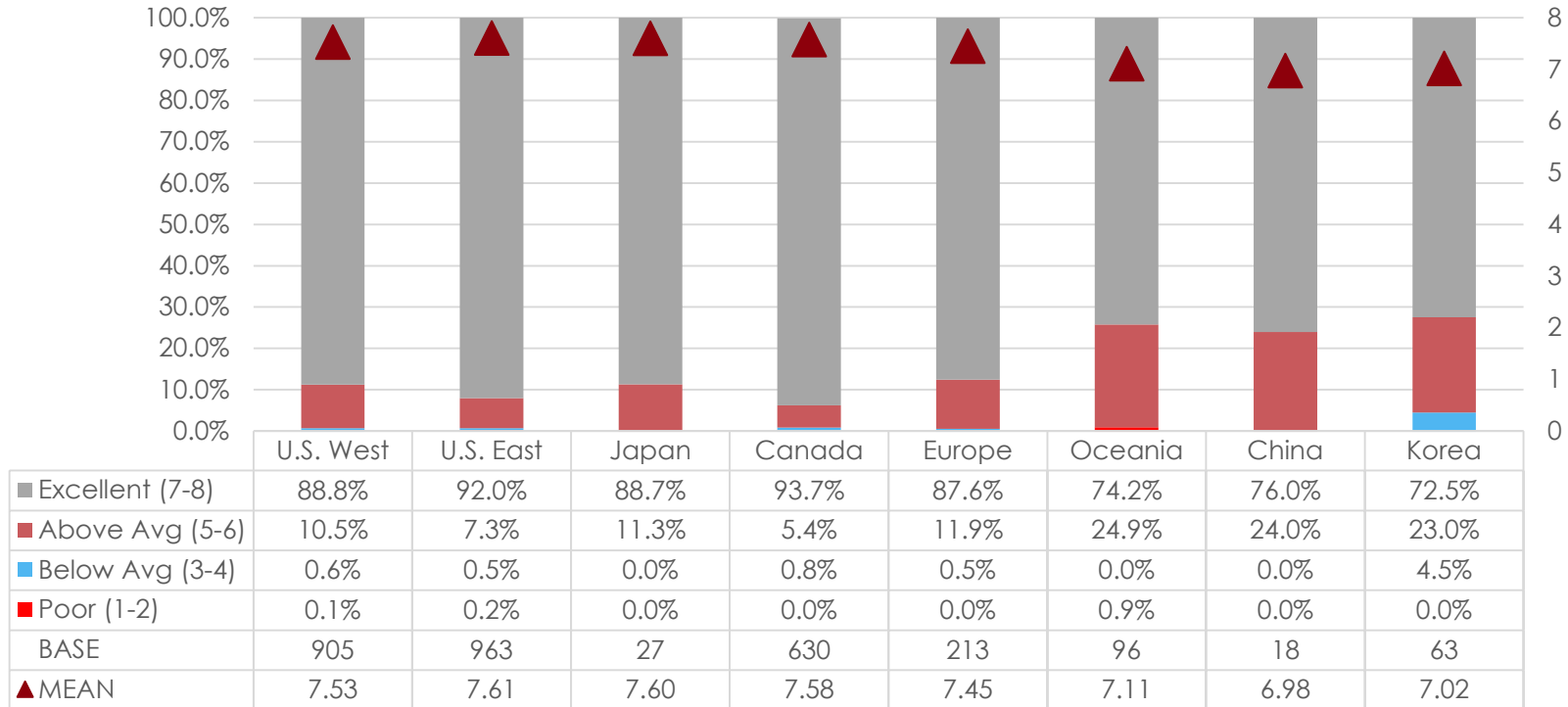
TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	46.1%	25.5%	22.2%	21.2%	9.4%	12.4%	0.0%	0.0%
Friend recommendation	31.8%	27.5%	22.2%	29.0%	30.3%	21.4%	100.0%	16.7%
Cruise line stop	1.5%	21.0%	0.0%	15.5%	10.0%	34.3%	0.0%	0.0%
Attending conference/ Event	3.2%	3.5%	22.2%	2.4%	1.0%	2.3%	0.0%	0.0%
Article/ blog	2.1%	3.6%	22.2%	6.3%	13.2%	1.5%	0.0%	0.0%
Travel agent	1.0%	3.8%	0.0%	2.4%	12.1%	14.4%	0.0%	47.6%
Never been to	2.4%	2.8%	0.0%	2.3%	1.0%		0.0%	0.0%
Visit friends/ family	1.7%	1.5%	0.0%	3.4%	1.0%	3.8%	0.0%	0.0%
Social media post	0.8%	1.3%	0.0%	4.3%	7.3%	6.1%	0.0%	0.0%
Natural beauty	1.3%	1.1%	0.0%	1.0%	3.1%	1.5%	0.0%	11.9%

SECTION – MAUI

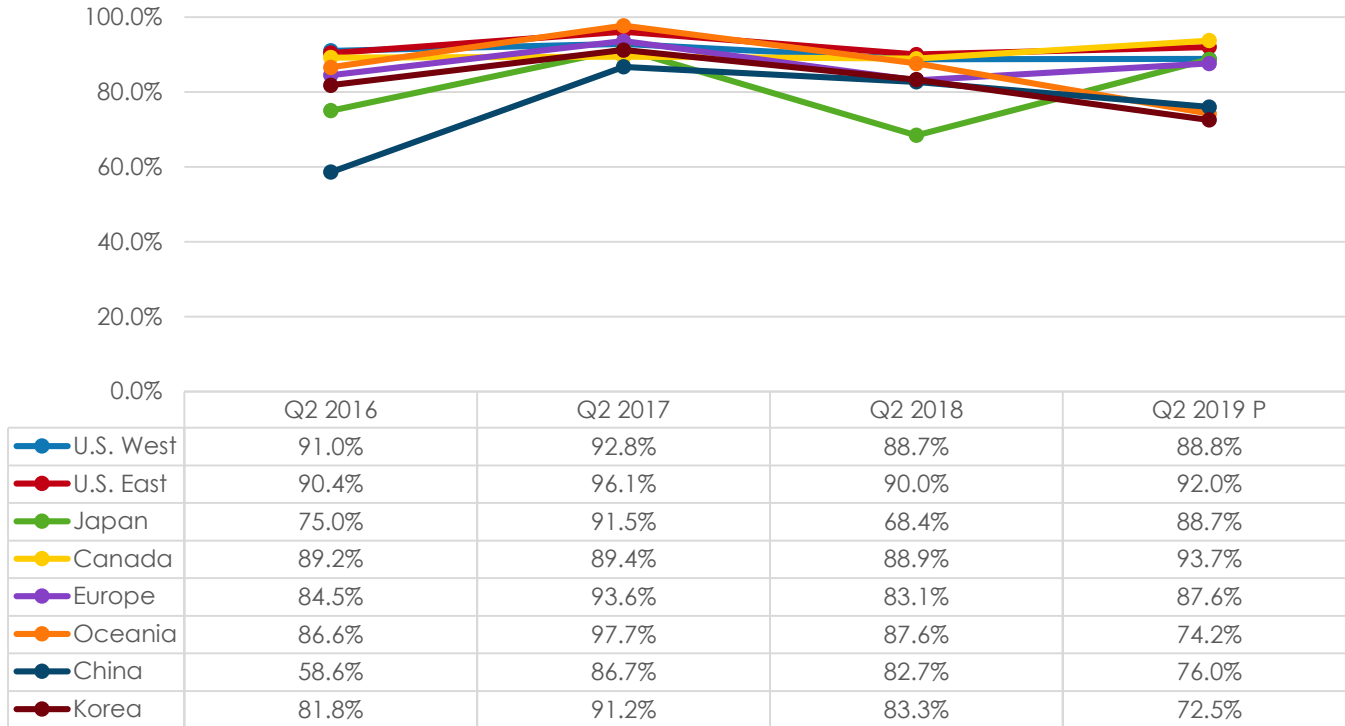
SATISFACTION – MAUI

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



SATISFACTION – MAUI

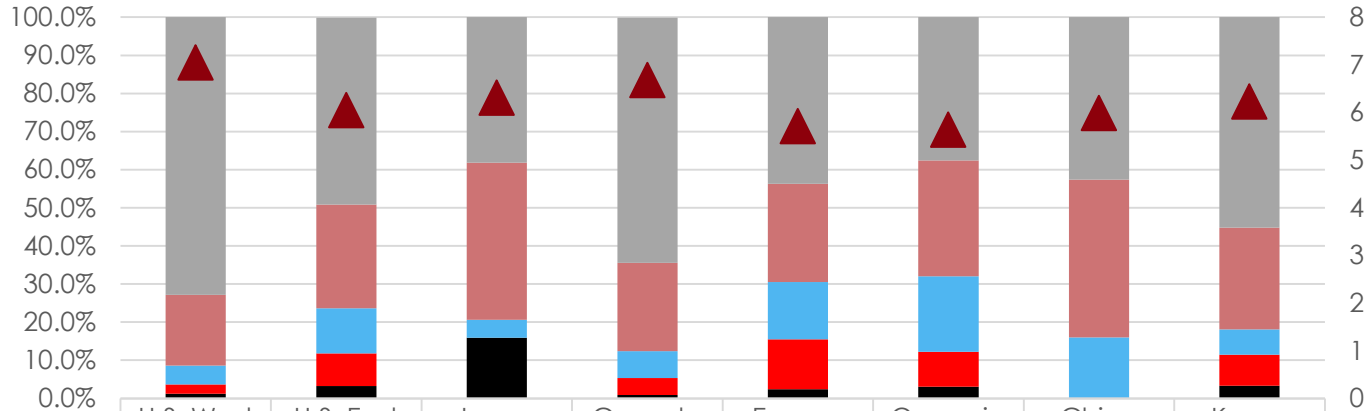
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

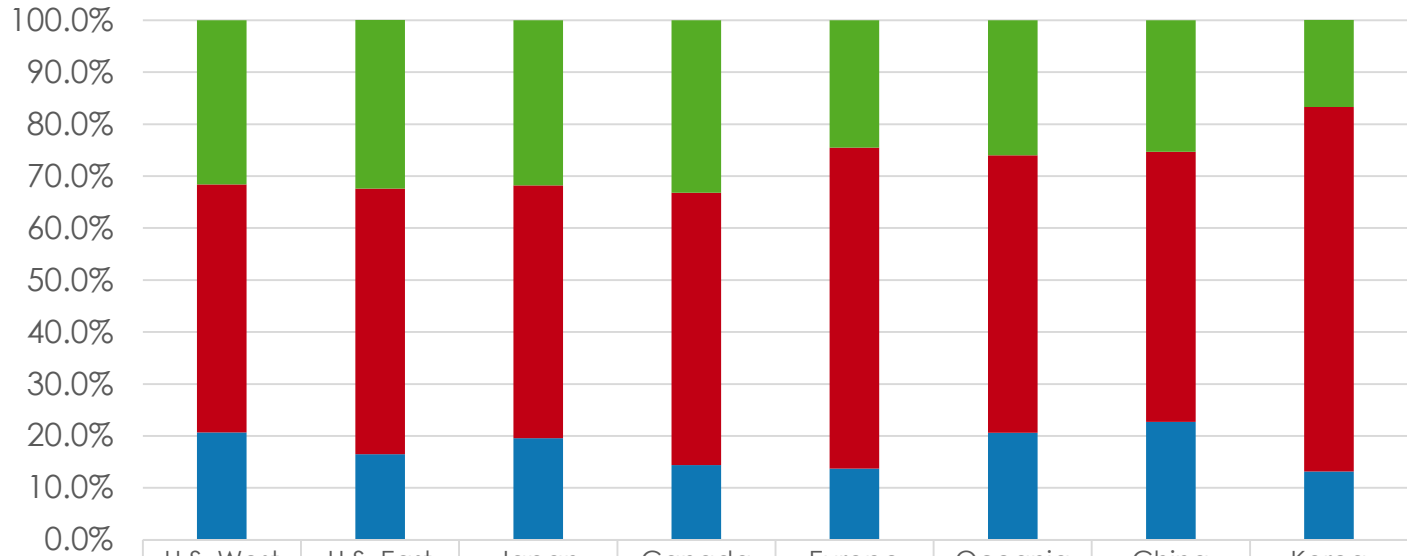
LIKELIHOOD OF RETURN VISIT – MAUI

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



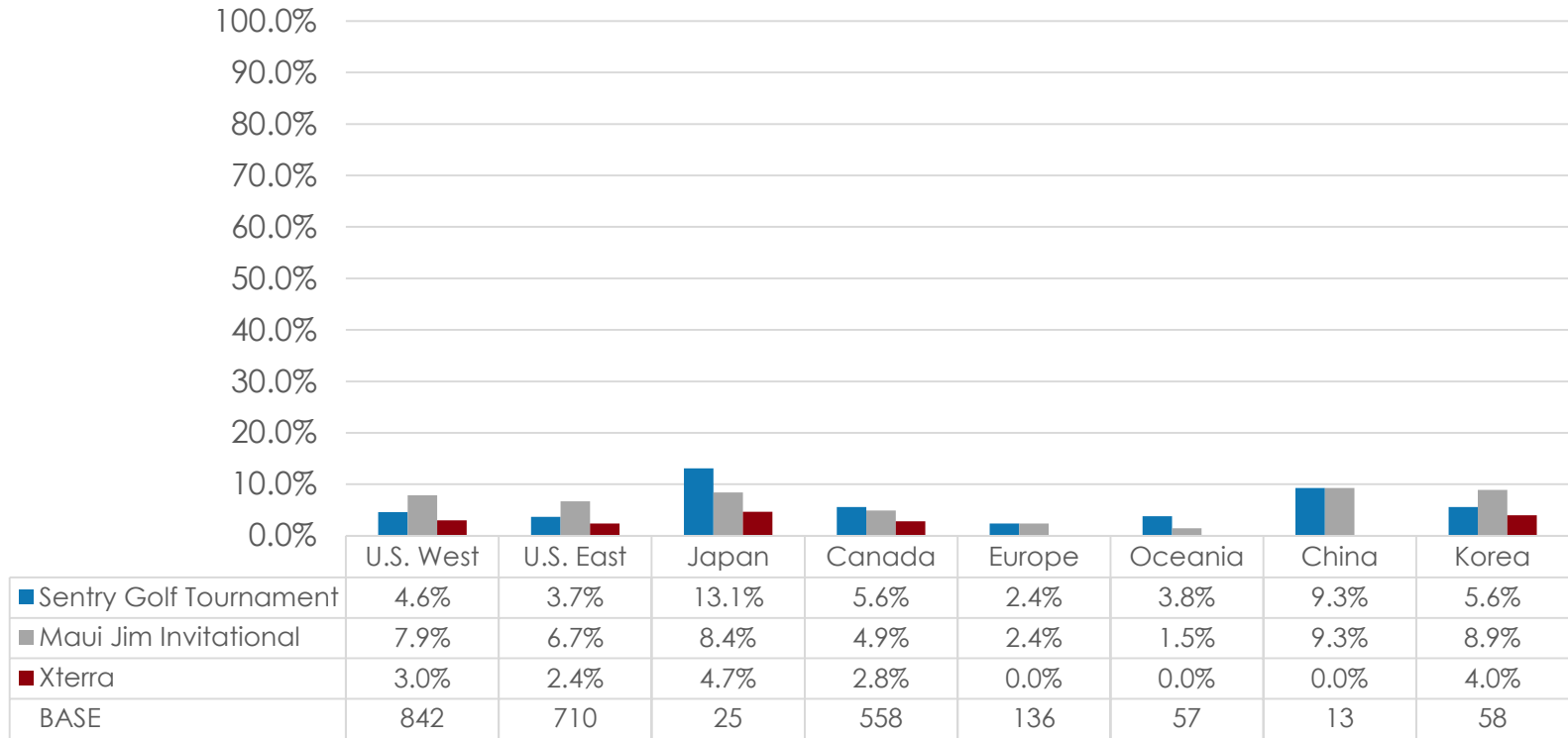
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	72.8%	49.1%	38.2%	64.3%	43.7%	37.6%	42.6%	55.3%
Somewhat likely (5-6)	18.6%	27.2%	41.2%	23.2%	25.8%	30.4%	41.4%	26.7%
Somewhat unlikely (3-4)	4.9%	11.8%	4.7%	7.1%	15.0%	19.8%	16.0%	6.6%
Very unlikely (1-2)	2.5%	8.6%	0.0%	4.4%	13.1%	9.1%	0.0%	8.2%
Not sure	1.2%	3.2%	15.9%	0.9%	2.4%	3.1%	0.0%	3.3%
BASE	829	707	25	552	134	57	13	58
MEAN	7.05	6.05	6.31	6.68	5.71	5.64	5.99	6.23

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	31.6%	32.5%	31.8%	33.2%	24.5%	26.0%	25.3%	16.8%
No Prior Awareness	47.7%	51.1%	48.6%	52.4%	61.8%	53.4%	52.0%	70.1%
Unsure	20.7%	16.5%	19.6%	14.4%	13.7%	20.6%	22.7%	13.2%
BASE	842	710	25	558	136	57	13	58

AIDED ADVERTISING AWARENESS – MAUI EVENTS



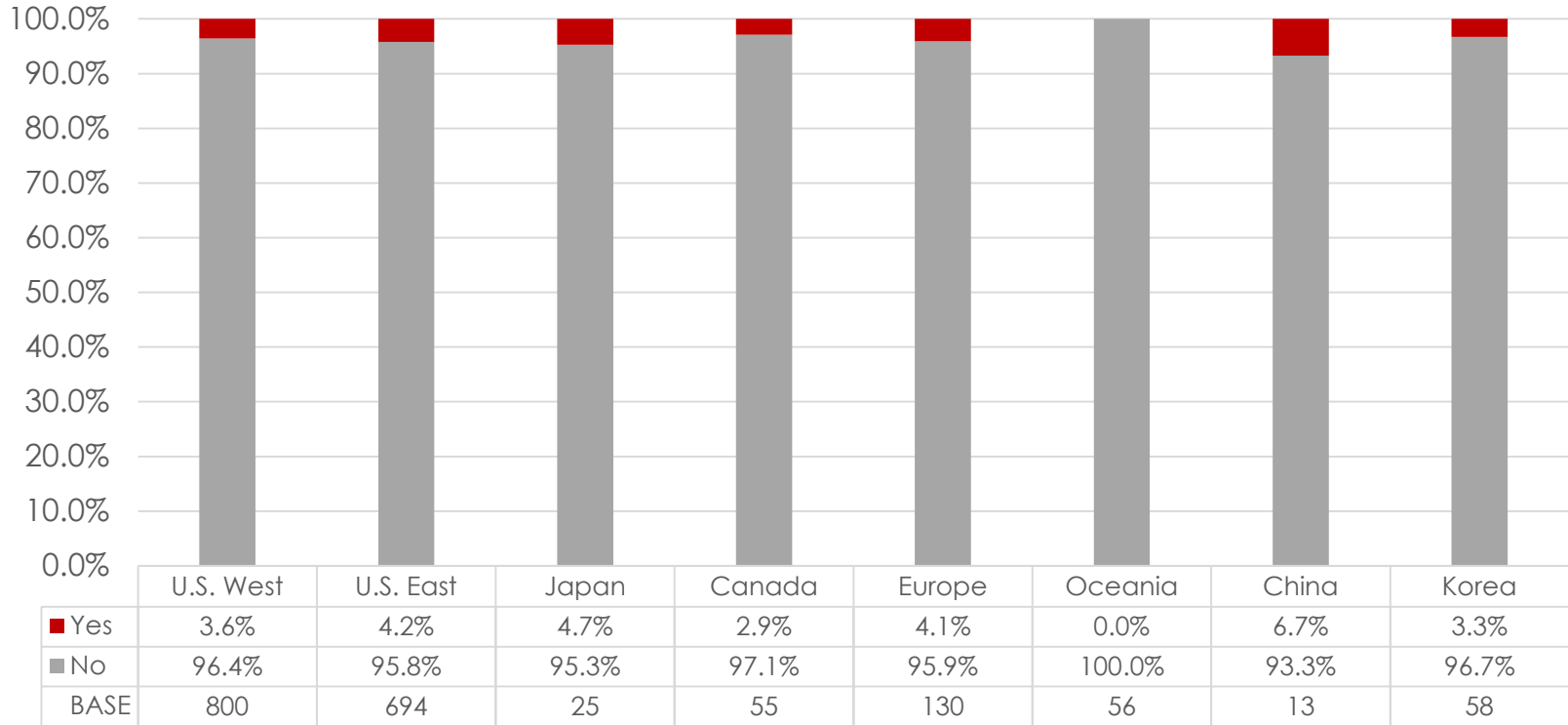
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
None of these	67.2%	65.5%	45.7%	57.4%	54.9%	77.9%	41.4%	53.9%
Hawaiian cultural events	12.9%	13.3%	17.8%	10.8%	16.8%	6.9%	6.7%	3.3%
Outdoor or sporting activities and events	17.3%	16.4%	13.1%	18.9%	21.1%	5.3%	25.3%	11.5%
Social media posts and videos	9.4%	12.3%	8.4%	18.9%	15.7%	6.1%	26.6%	26.7%
Hawaiian Music	8.8%	7.2%	9.4%	7.4%	5.3%	1.5%	6.7%	1.6%
TV programs/ Movies filmed in Hawaii	5.7%	8.2%	18.6%	11.8%	14.9%	8.3%	32.0%	15.8%

ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	2.9%	3.0%	3.7%	3.6%	1.4%	0.0%	6.7%	1.6%
Aquarium Maui /Maui Ocean Center	18.5%	15.7%	4.7%	24.4%	9.9%	7.0%	25.3%	7.9%
Baldwin Missionary Home Museum	4.5%	4.9%	0.0%	4.3%	2.9%	5.4%	0.0%	0.0%
Hale Pa'i Printing House	0.0%	0.3%	0.0%	0.4%	1.3%	1.6%	0.0%	0.0%
Haleakala National Park	28.9%	44.1%	44.9%	46.7%	44.2%	20.8%	52.0%	57.3%
Haleki'i-Pihana Heiau State Monument	1.0%	3.3%	3.7%	2.8%	0.0%	1.6%	0.0%	0.0%
Hana Cultural Center	7.5%	17.3%	0.0%	14.2%	17.5%	10.8%	41.4%	4.0%
'Iao Valley State Monument	15.2%	13.0%	8.4%	21.2%	20.3%	2.3%	0.0%	4.9%
Kepaniwai Park & Heritage Gardens	2.4%	5.0%	0.0%	4.2%	5.9%	4.7%	0.0%	5.6%
Kula Botanical Garden	6.5%	7.3%	7.5%	9.1%	9.6%	3.1%	16.0%	3.3%
Maui Historical Society Bailey House Museum	2.9%	2.1%	3.7%	3.3%	1.4%	4.7%	0.0%	1.6%
Whaler's Village Museum	15.0%	12.9%	11.2%	12.6%	12.0%	11.7%	20.0%	3.3%
Wo Hing Temple Museum	1.7%	1.4%	3.7%	2.2%	1.3%	0.0%	26.6%	0.0%

VISITED MAUI FOR SPECIFIC EVENT



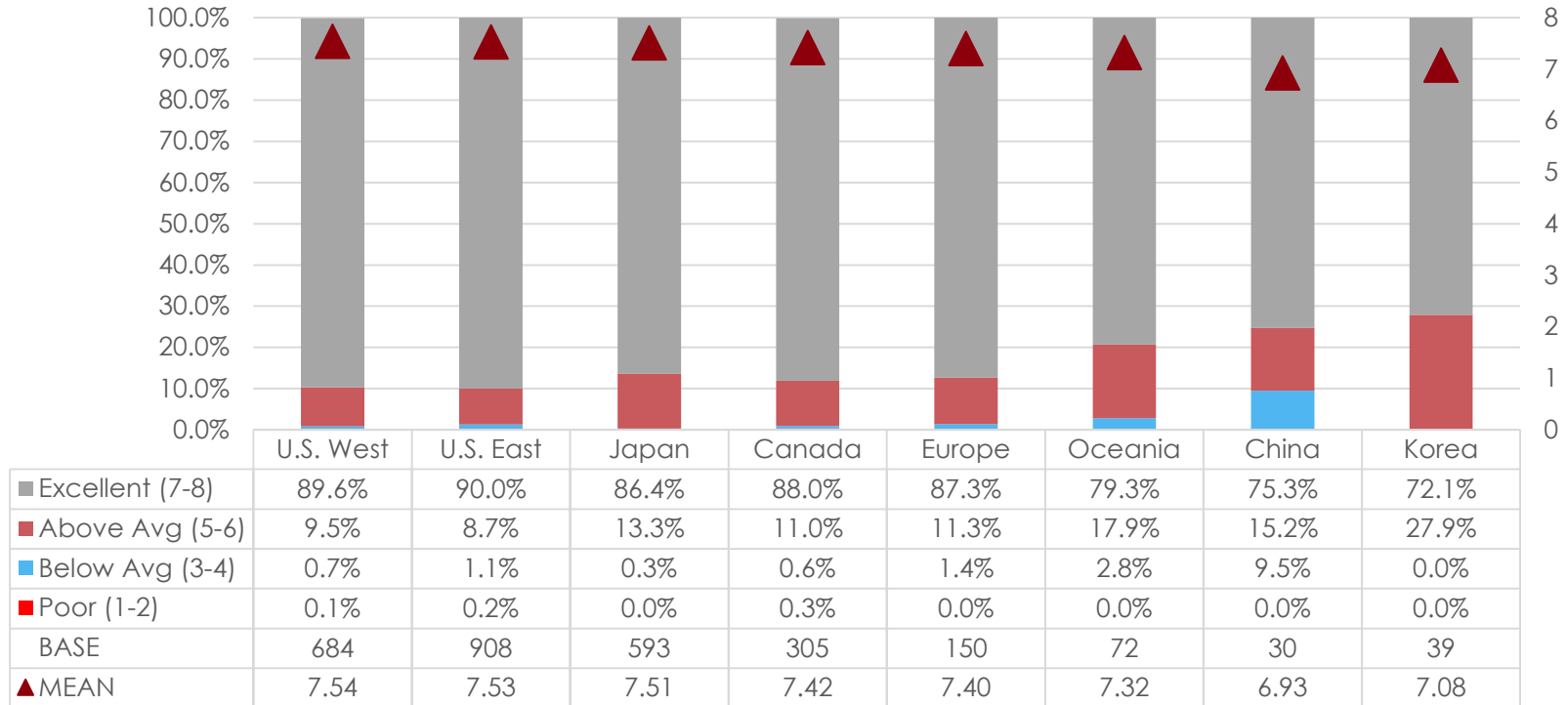
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wedding/ honeymoon, anniversary/ birthday/ funeral	42.9%	25.1%	0.0%	56.8%	20.0%	0.0%	0.0%	37.1%
Other	14.3%	24.6%	0.0%	21.2%	40.0%	100.0%	0.0%	17.7%
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	3.6%	28.8%	0.0%	7.5%	20.0%	0.0%	50.0%	11.8%
Other Festival/ concert	17.9%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%
Other sporting event	10.6%	0.0%	0.0%	14.4%	0.0%	0.0%	0.0%	7.2%
Hawaii Food & Wine Festival	3.6%	7.3%	100.0%	0.0%	0.0%	0.0%	50.0%	4.8%
Maui Film Festival	7.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%
Whale Watching	0.0%	3.6%	0.0%	0.0%	20.0%	0.0%	0.0%	1.2%
Maui Marathon	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%

SECTION – ISLAND OF HAWAI‘I

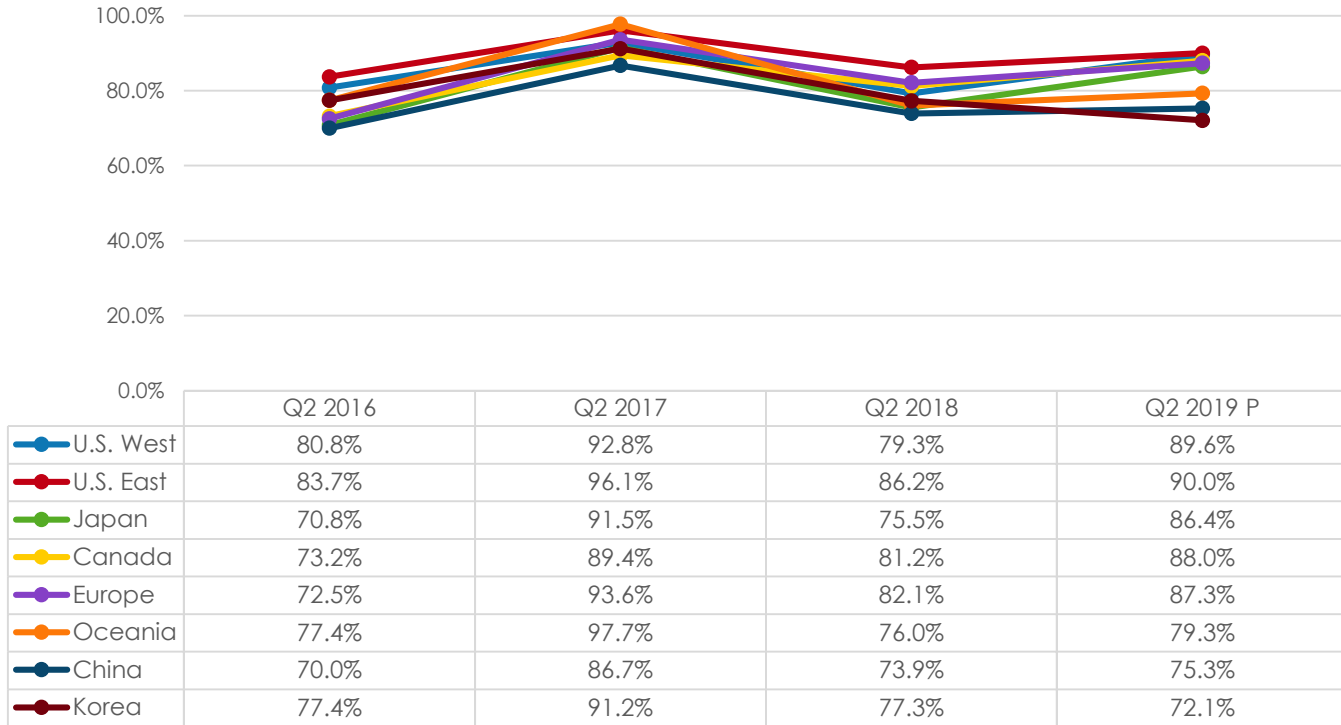
SATISFACTION – ISLAND OF HAWAI‘I

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



SATISFACTION – ISLAND OF HAWAI‘I

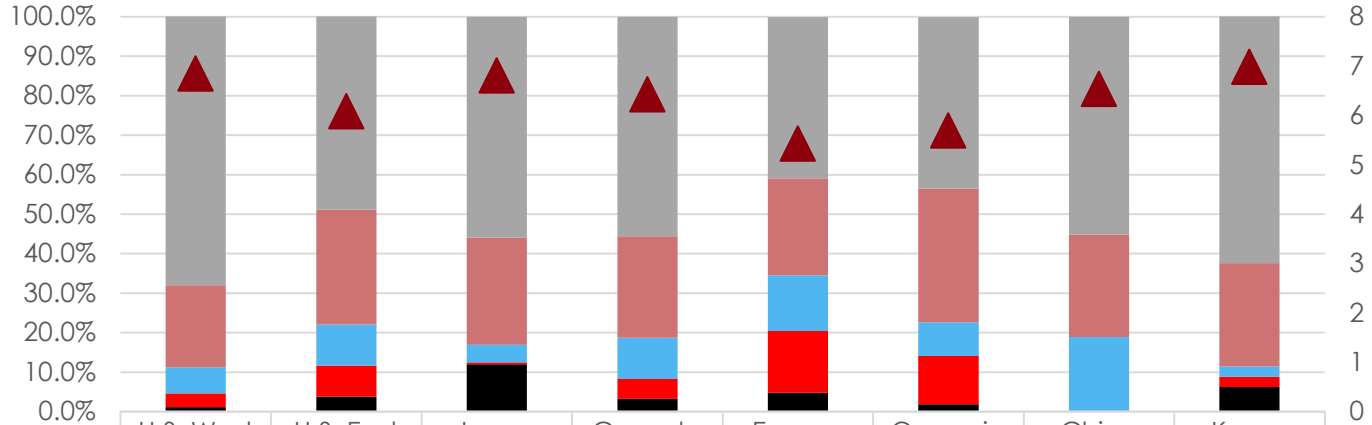
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

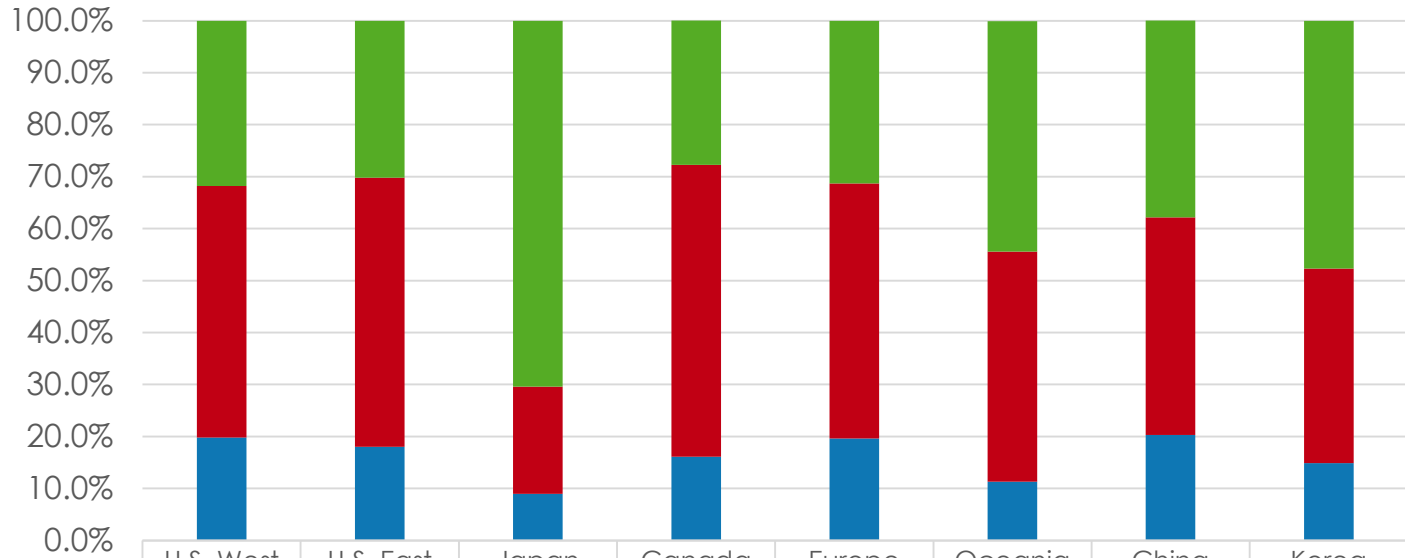
LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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)	68.1%	49.0%	55.9%	55.6%	40.8%	43.4%	55.2%	62.6%
■ Somewhat likely (5-6)	20.8%	29.1%	27.2%	25.7%	24.6%	33.9%	25.9%	26.2%
■ Somewhat unlikely (3-4)	6.6%	10.3%	4.4%	10.4%	14.1%	8.5%	18.9%	2.6%
■ Very unlikely (1-2)	3.5%	7.9%	0.5%	5.1%	15.6%	12.2%	0.0%	2.6%
■ Not sure	1.1%	3.8%	12.0%	3.2%	4.8%	1.9%	0.0%	6.2%
BASE	635	652	559	256	104	43	27	35
▲ MEAN	6.85	6.09	6.81	6.43	5.43	5.70	6.54	6.99

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



■ Aided Ad Awareness	31.8%	30.2%	70.4%	27.8%	31.3%	44.3%	37.9%	47.7%
■ No Prior Awareness	48.4%	51.8%	20.6%	56.2%	49.1%	44.3%	41.9%	37.4%
■ Unsure	19.8%	18.0%	9.0%	16.1%	19.6%	11.3%	20.3%	14.9%
BASE	644	667	559	261	104	43	28	35

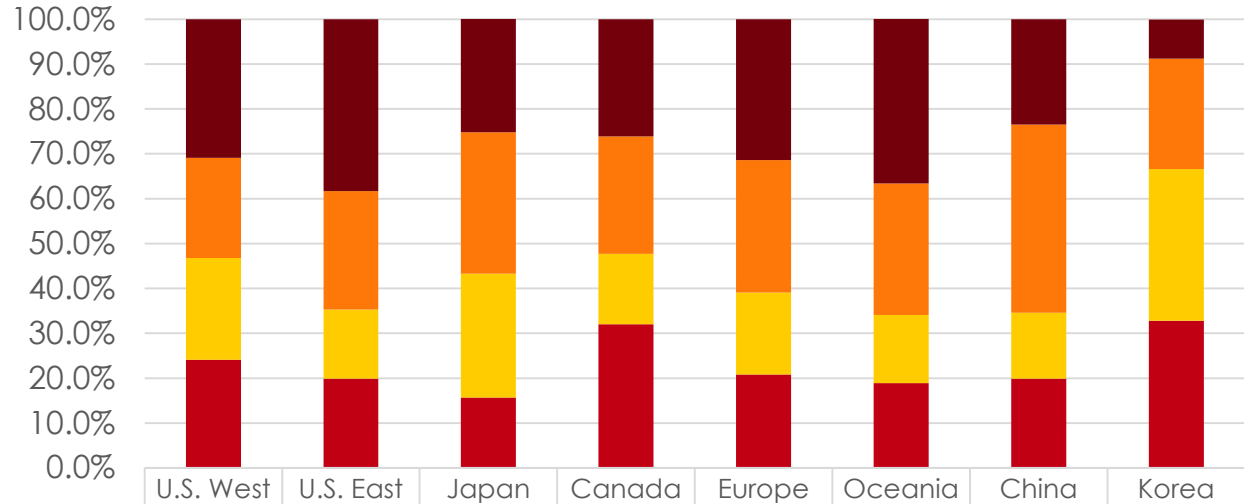
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
‘Akaka Falls	27.8%	38.0%	22.7%	35.1%	49.1%	34.9%	15.4%	32.3%
Botanical Gardens	17.8%	19.9%	4.1%	21.4%	29.3%	18.9%	11.9%	5.1%
H.N. Greenwell Store	2.5%	4.0%	0.7%	4.5%	1.8%	0.0%	0.0%	5.1%
Hawaii Volcanoes National Park	46.6%	63.5%	57.3%	60.7%	71.1%	70.5%	67.8%	37.9%
Hilo Farmers Market	24.6%	25.7%	14.8%	25.8%	32.1%	22.7%	8.4%	8.7%
Hulihe‘e Palace	6.8%	6.8%	10.8%	9.1%	11.7%	5.6%	10.5%	11.3%
‘Imiloa Astronomy Ctr	2.5%	3.8%	2.7%	3.5%	6.7%	10.3%	17.5%	5.1%
Kaloko-Honokohau National Historical Park	11.5%	13.3%	2.3%	12.2%	11.5%	10.3%	14.0%	6.2%
Kona Coffee Living History Farm	14.9%	20.7%	27.4%	18.5%	17.6%	29.2%	10.5%	41.0%
Lili‘uokalani Park and Garden	9.1%	11.0%	4.2%	5.5%	9.5%	3.8%	0.0%	11.3%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

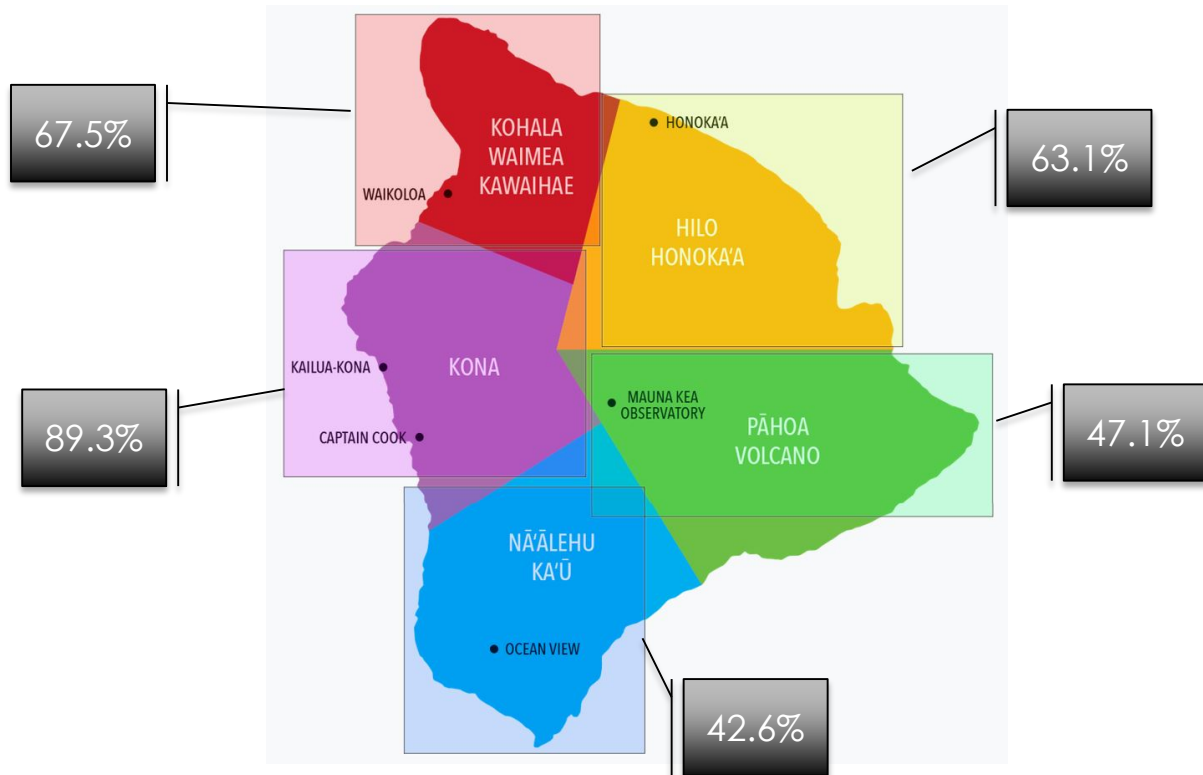
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Lyman House Memorial Museum	1.4%	1.6%	0.7%	2.8%	1.0%	0.0%	0.0%	2.6%
Maunakea	16.5%	21.4%	52.1%	26.4%	43.2%	16.1%	50.3%	33.8%
Orchid Farm	3.7%	4.0%	0.2%	2.7%	6.5%	8.4%	10.5%	3.6%
Pacific Tsunami Museum	3.8%	3.1%	1.1%	3.8%	3.8%	4.7%	7.0%	3.6%
Pana'ewa Rainforest Zoo & Garden	6.5%	5.1%	1.2%	8.0%	5.5%	5.6%	0.0%	0.0%
Pu'uhonua o Honaunau National Historical Park	21.2%	22.5%	5.7%	23.8%	28.7%	10.3%	17.5%	8.7%
Pu'ukohola Heia National Historical Site	10.5%	11.9%	3.7%	9.8%	8.5%	7.5%	0.0%	2.6%
Punalu'u Black Sand Beach	31.3%	42.5%	25.4%	48.9%	48.7%	35.6%	50.3%	14.9%
Rainbow Falls	28.4%	40.9%	20.7%	31.3%	48.9%	42.3%	28.0%	17.9%
Volcano Art Center	9.4%	10.8%	11.8%	7.4%	18.2%	21.5%	14.0%	5.1%

TRAVEL ON ISLAND OF HAWAI'I

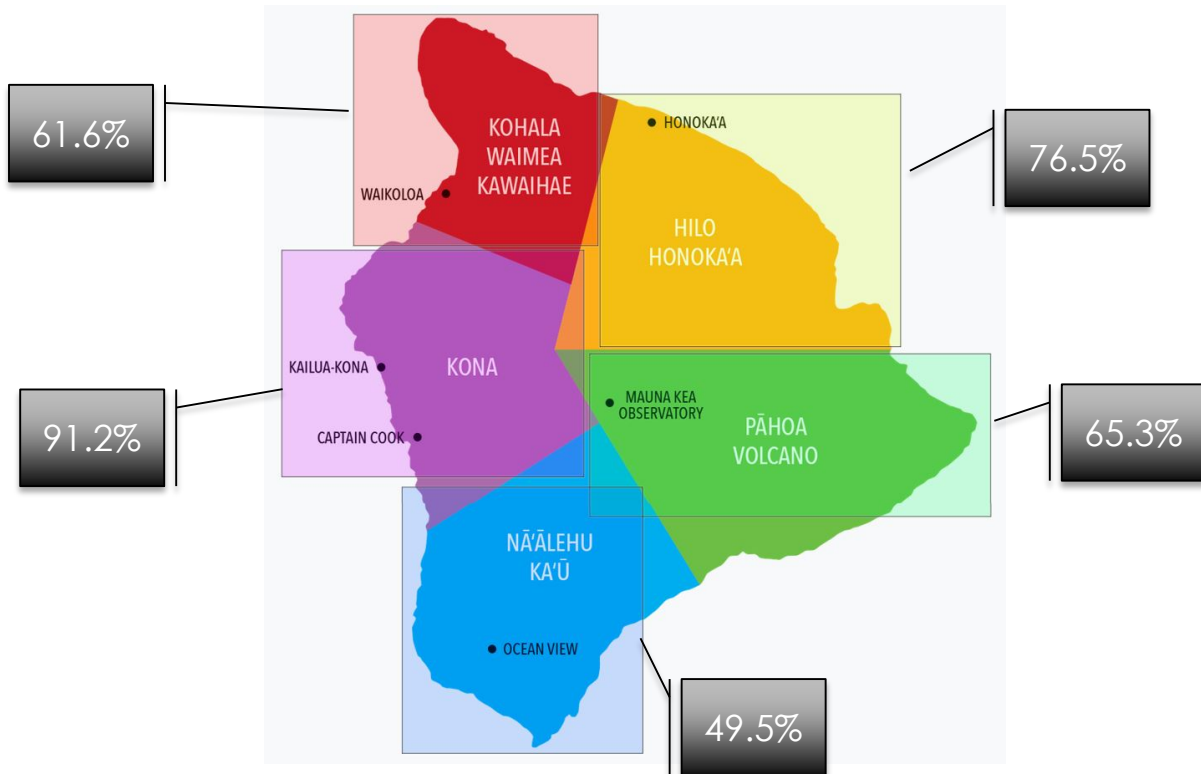


Traveled to other side of island	30.9%	38.3%	25.3%	26.1%	31.4%	36.7%	23.5%	8.7%
Traveled more than 1 hour	22.3%	26.4%	31.5%	26.2%	29.5%	29.3%	41.9%	24.6%
Traveled 1 hour or less one way to reach activity	22.7%	15.4%	27.6%	15.7%	18.3%	15.2%	14.7%	33.8%
Enjoy activities- short drive from accommodations	24.1%	19.9%	15.7%	32.0%	20.8%	18.9%	19.9%	32.8%
BASE	610	636	557	253	103	43	26	35

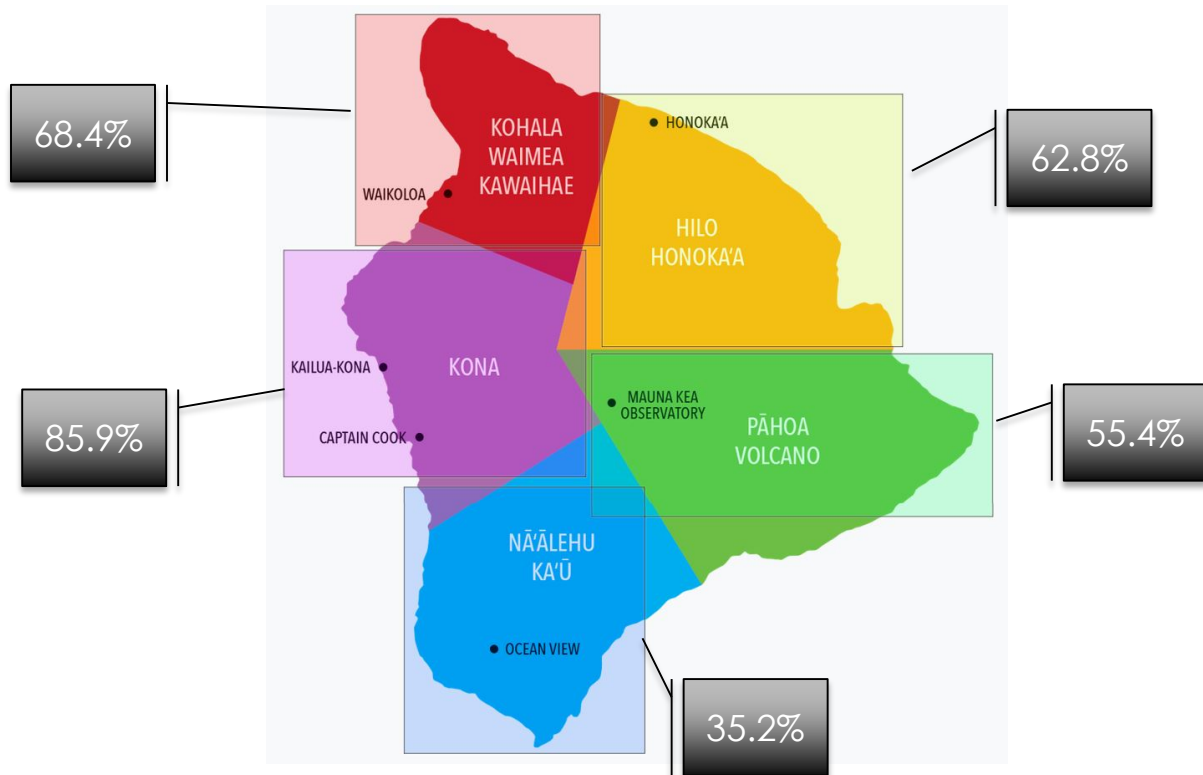
AREAS VISITED U.S. WEST



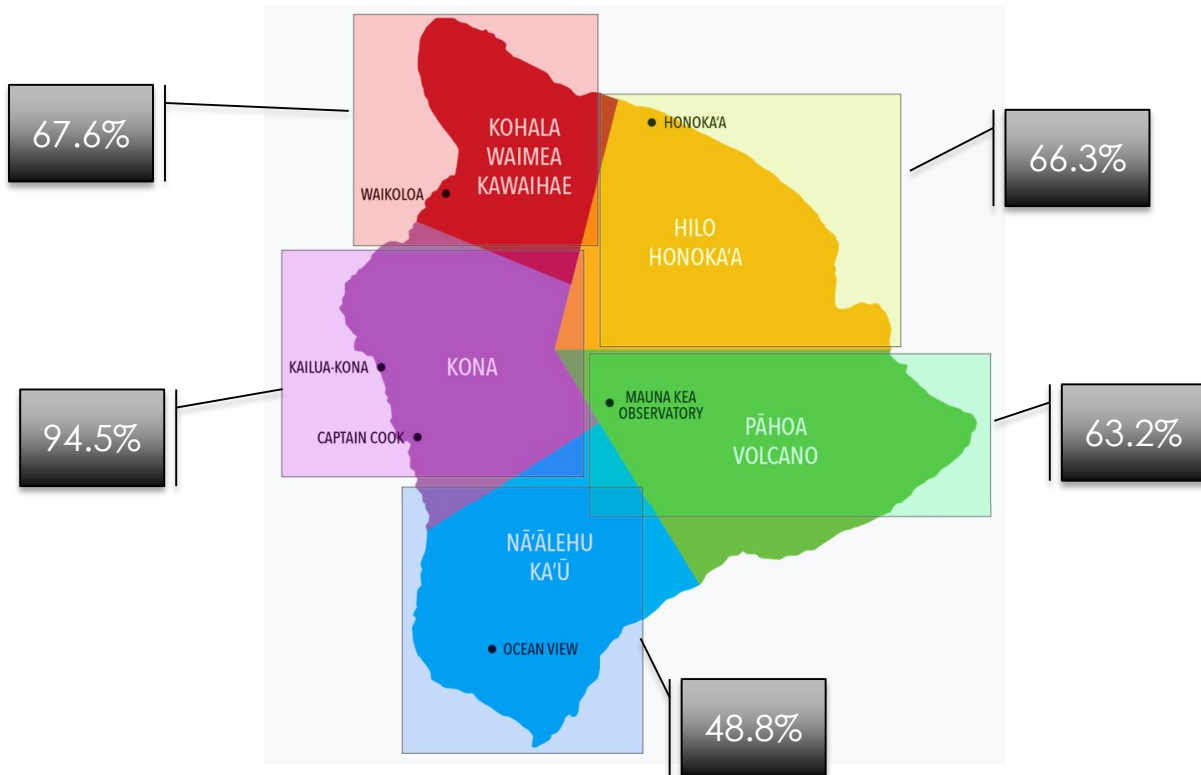
AREAS VISITED U.S. EAST



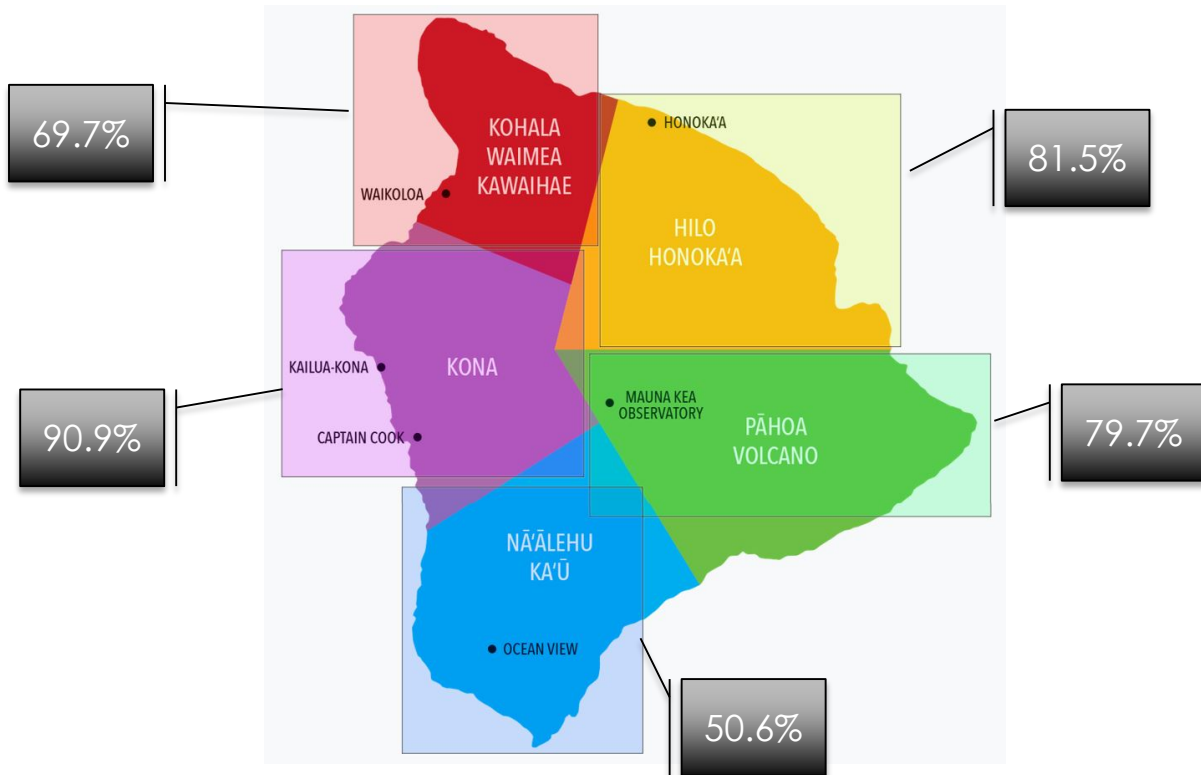
AREAS VISITED JAPAN



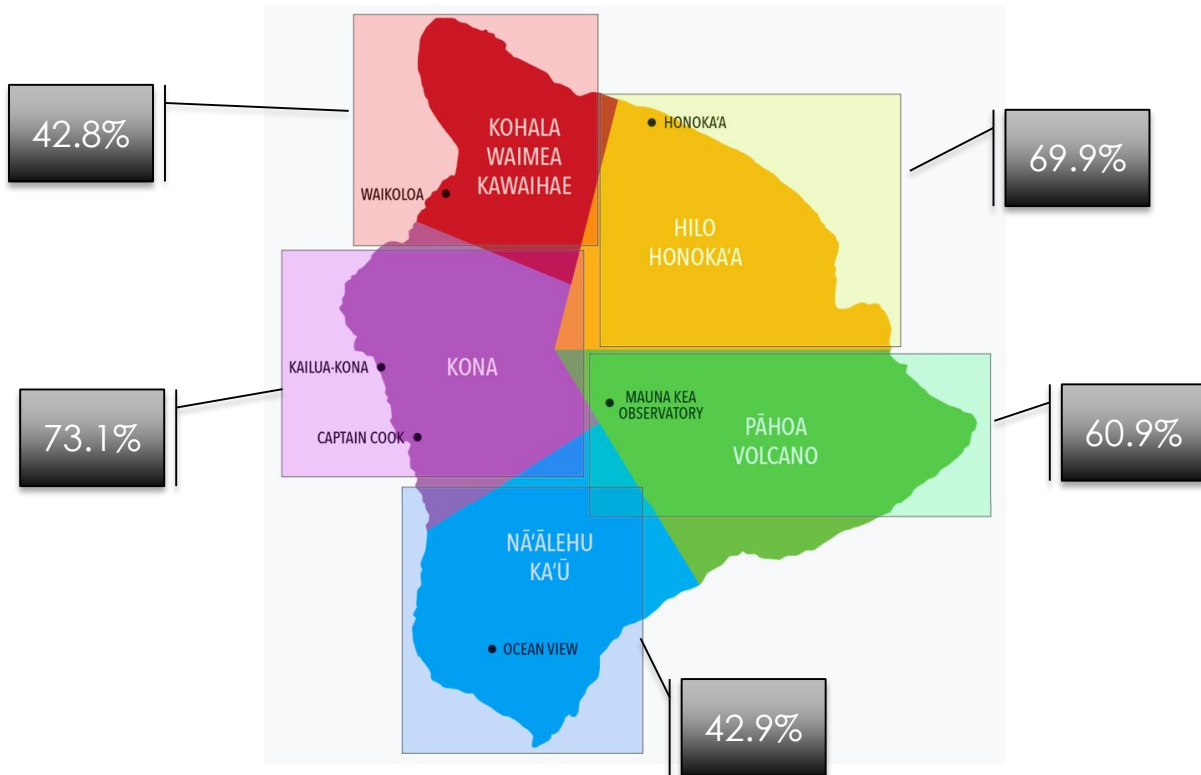
AREAS VISITED CANADA



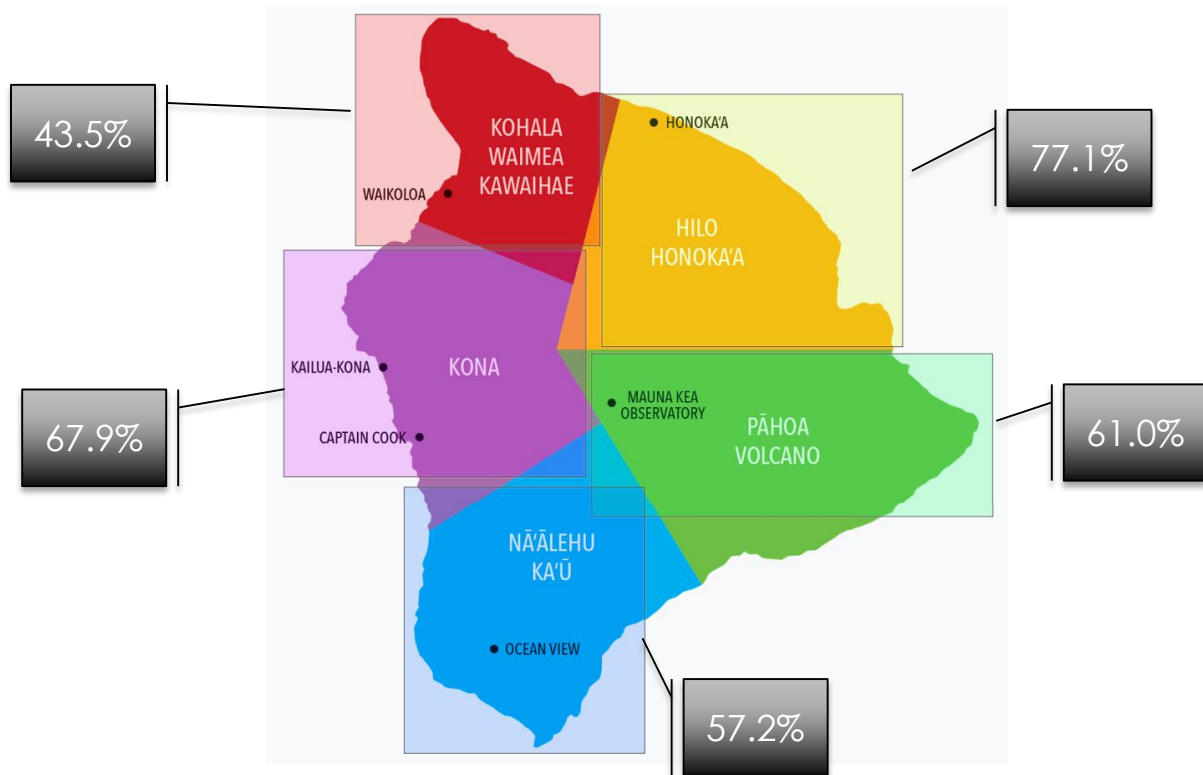
AREAS VISITED EUROPE



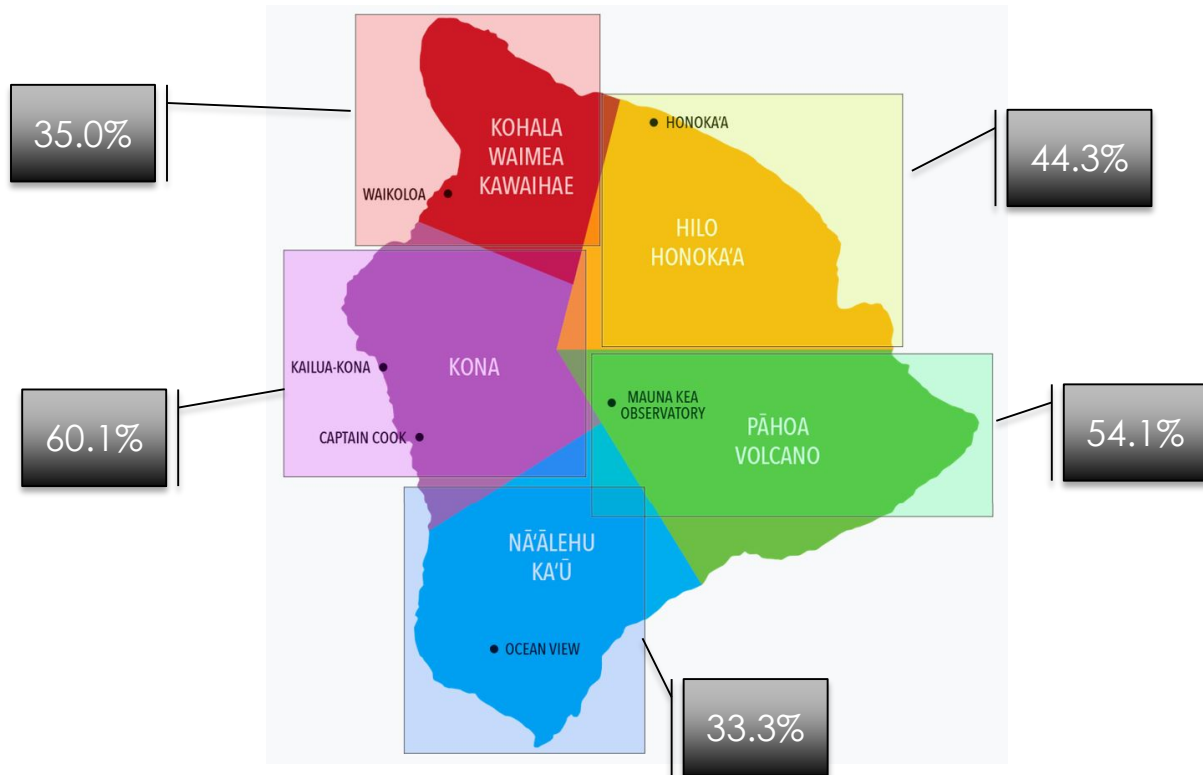
AREAS VISITED OCEANIA



AREAS VISITED CHINA

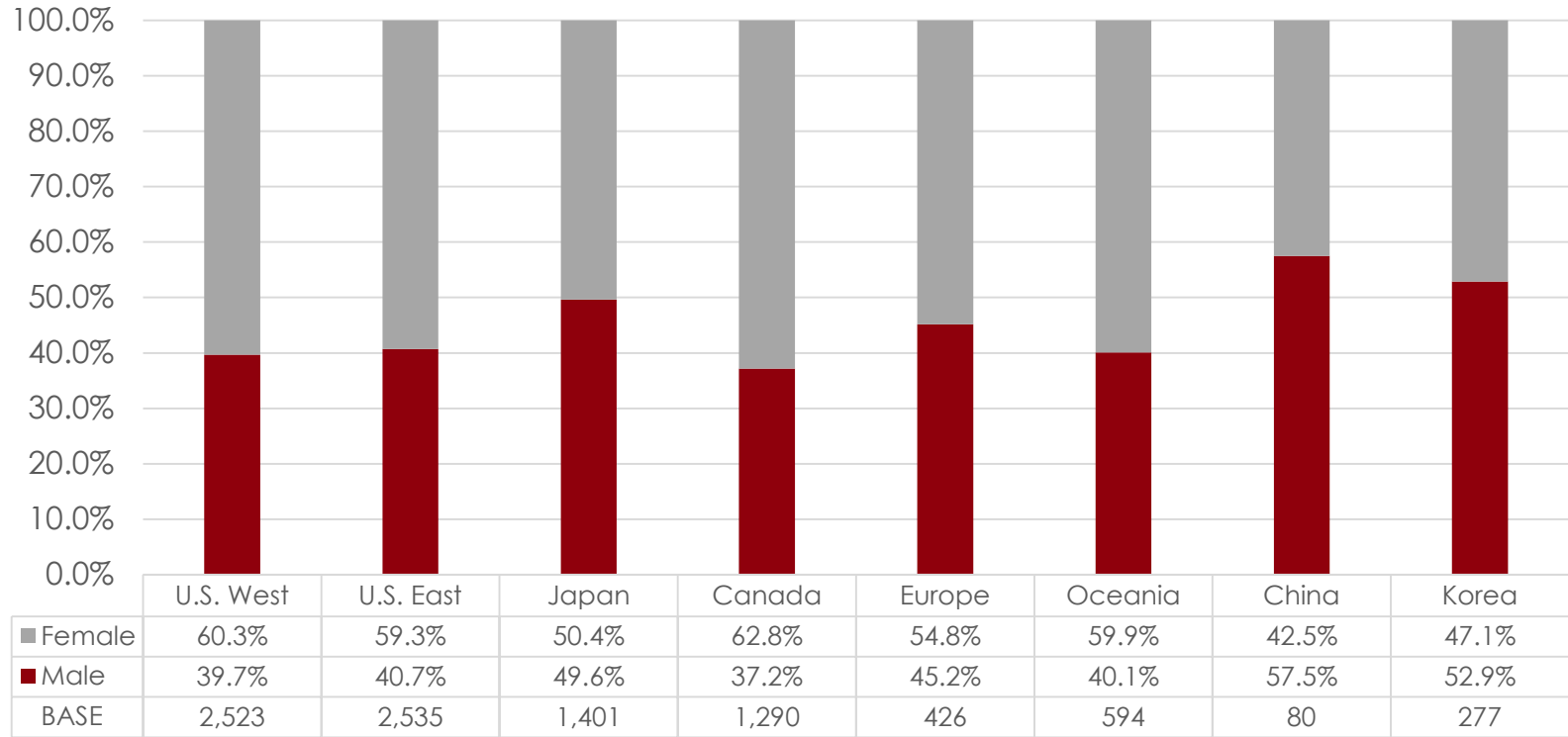


AREAS VISITED KOREA

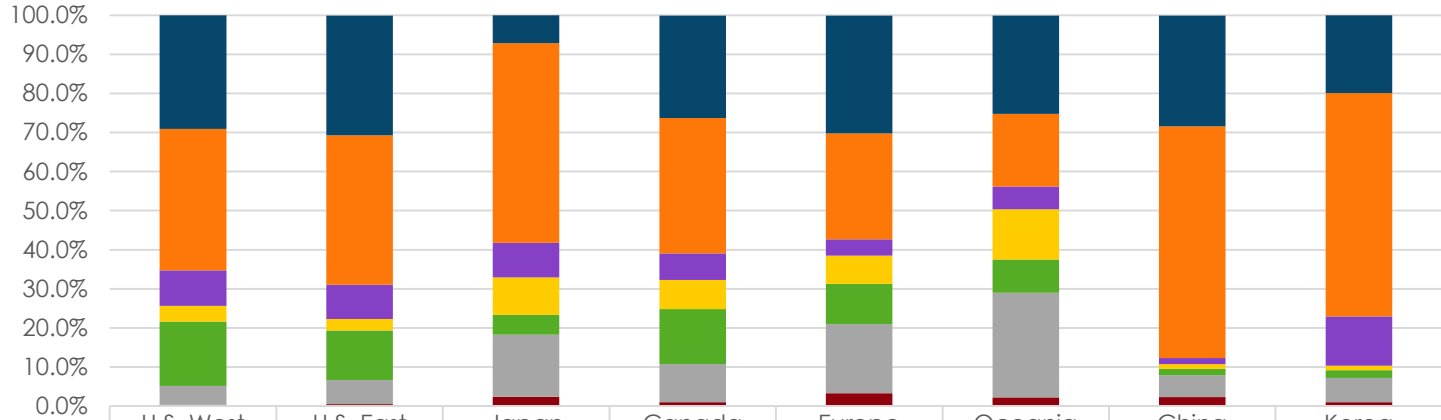


SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Post-Graduate	29.1%	30.6%	7.1%	26.2%	30.1%	25.1%	28.3%	19.9%
■ College Grad	36.2%	38.3%	51.1%	34.6%	27.1%	18.6%	59.3%	57.2%
■ Associate Degree	9.1%	8.7%	8.9%	6.8%	4.2%	5.8%	1.6%	12.6%
■ Vocational/ Tech	4.0%	3.0%	9.6%	7.5%	7.2%	12.9%	1.2%	1.1%
■ Some College	16.4%	12.7%	5.0%	14.1%	10.3%	8.5%	1.6%	2.0%
■ H.S. Grad	4.9%	6.1%	15.9%	9.7%	17.7%	26.8%	5.6%	6.2%
■ Some / No H.S.	0.3%	0.5%	2.4%	1.0%	3.3%	2.2%	2.3%	1.0%
BASE	2,516	2,530	1,398	1,286	426	594	80	277

VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	5.6%	5.5%	7.3%	17.7%	10.7%
\$40,000 to \$59,999	6.9%	9.4%	10.2%	12.6%	10.0%
\$60,000 to \$79,999	10.4%	11.1%	11.8%	11.4%	10.4%
\$80,000 to \$99,999	8.8%	11.1%	11.0%	16.1%	11.8%
\$100,000 to \$124,999	15.6%	15.5%	15.3%	10.8%	11.1%
\$125,000 to \$149,999	12.1%	11.2%	12.8%	8.8%	14.9%
\$150,000 to \$174,999	9.7%	8.4%	8.5%	6.7%	9.8%
\$175,000 to \$199,999	6.9%	5.5%	6.3%	3.4%	6.5%
\$200,000 to \$249,999	9.4%	8.0%	4.8%	4.1%	6.1%
\$250,000 +	14.6%	14.3%	11.9%	8.4%	8.5%

VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	16.8%
¥3.5 - ¥4.5 million	15.0%
¥4.5 - ¥5.5 million	11.8%
¥5.5 - ¥6.5 million	8.3%
¥6.5 - ¥7.5 million	7.0%
¥7.5 - ¥8.5 million	8.0%
¥8.5 - ¥10.0 million	8.6%
¥10.0 - ¥15.0 million	12.7%
¥15.0 - ¥20.0 million	5.5%
¥20.0 million +	6.4%

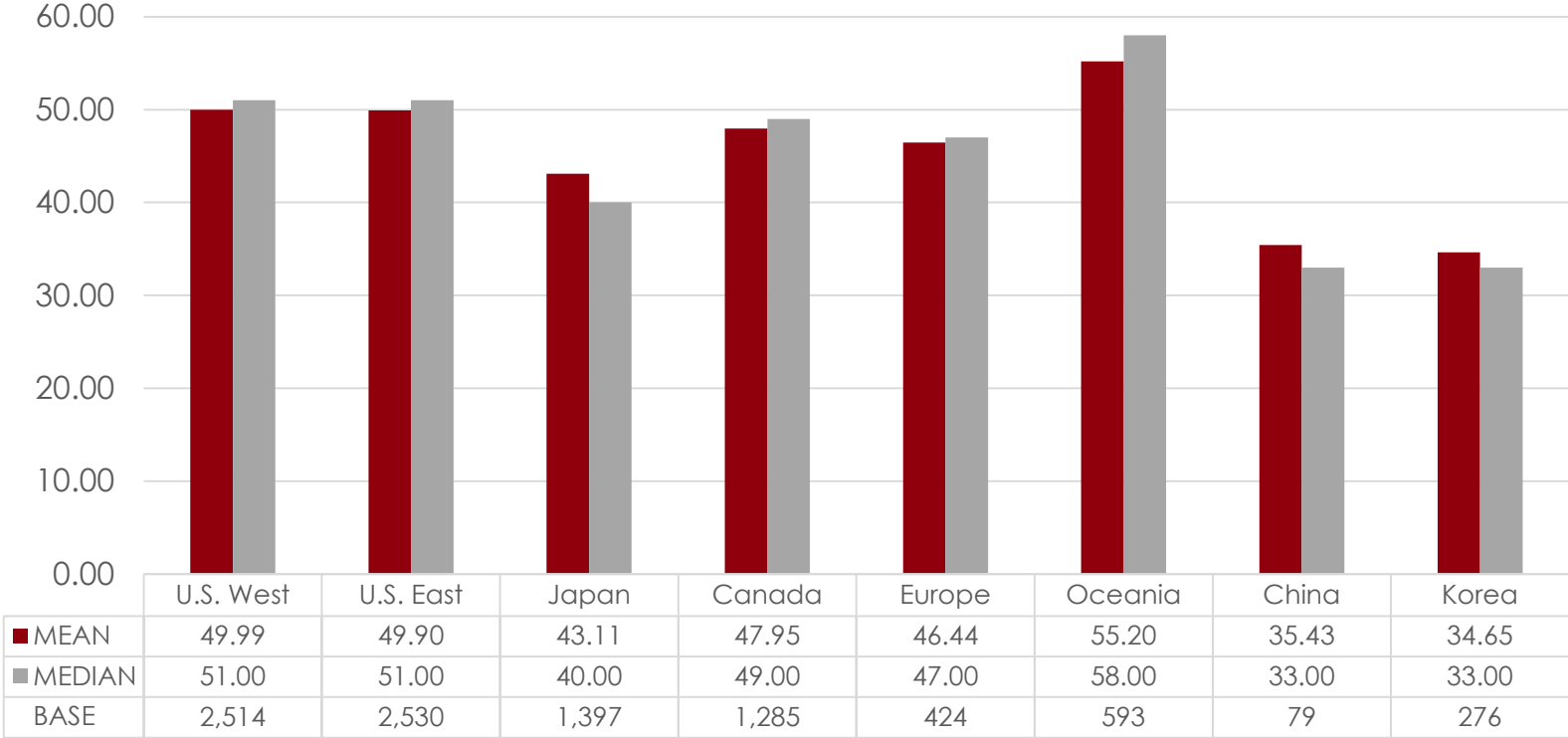
VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	8.9%
₩16,305,000-21,171,999	9.4%
₩27,174,000-38,041,999	15.7%
₩38,044,000-48,911,999	14.2%
₩48,912,000-59,781,999	10.3%
₩59,782,000-70,652,999	11.5%
₩70,653,000-81,520,999	5.9%
₩81,521,000-92,390,999	3.7%
₩92,391,000-103,259,999	3.7%
₩103,260,000+	16.5%

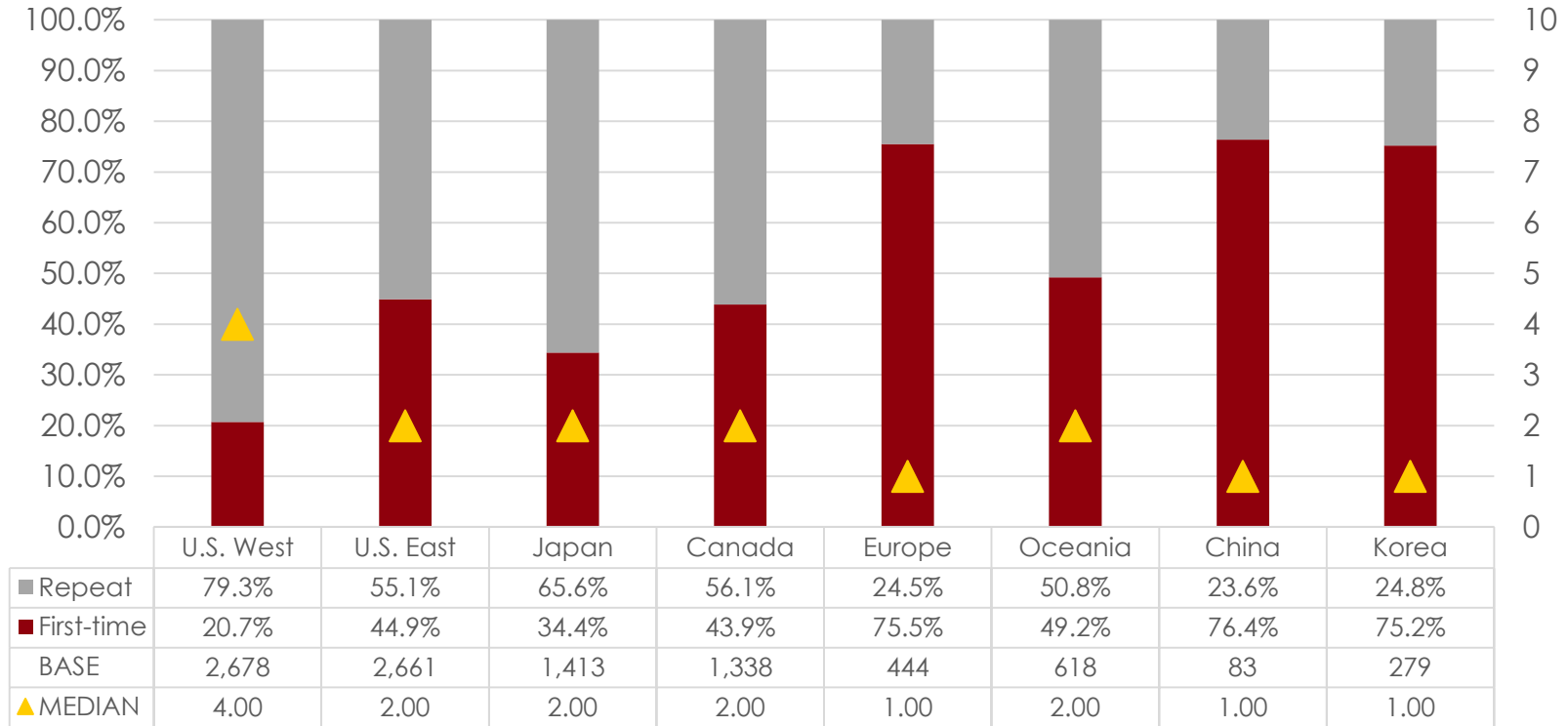
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	25.4%
¥250,800 - ¥376,099	23.6%
¥376,100 - ¥501,399	16.3%
¥501,400 - ¥626,799	8.6%
¥626,800 - ¥783,499	5.4%
¥783,500 - ¥940,199	6.7%
¥940,200 - ¥1,096,899	2.5%
¥1,096,900 - ¥1,253,599	2.5%
¥1,253,600 - ¥1,560,799	2.5%
¥1,560,800+	6.7%

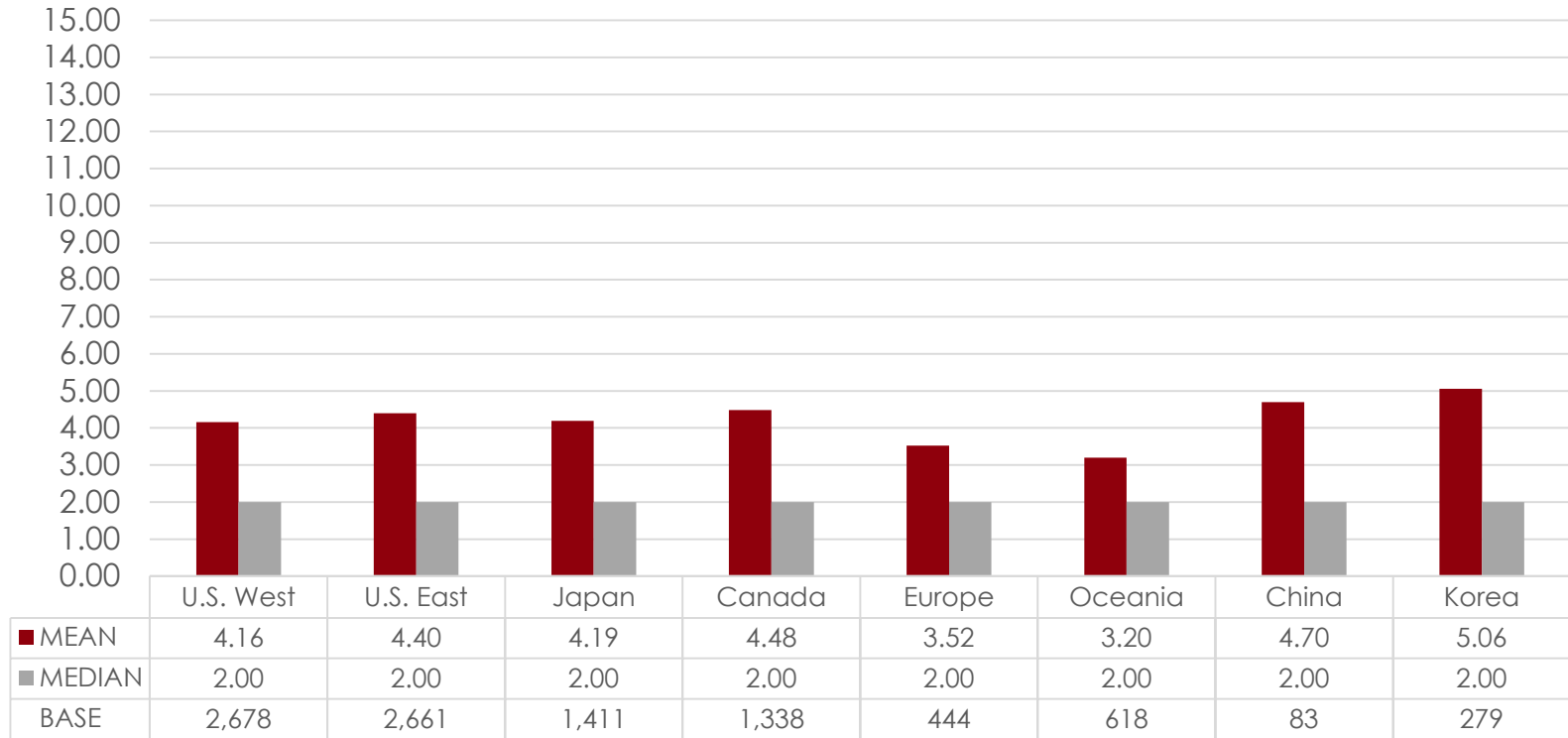
VISITOR PROFILE – AGE



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	61.2%	61.6%	62.5%	58.7%	52.9%	68.7%	38.2%	67.5%
Other adult family	29.2%	29.0%	19.8%	29.0%	17.1%	20.9%	22.9%	17.2%
Child <18	28.4%	19.7%	14.2%	18.4%	11.6%	15.4%	10.6%	14.7%
Friend/ Associate	15.7%	16.0%	17.1%	19.2%	15.6%	16.9%	22.0%	11.1%
Alone	8.5%	9.4%	6.0%	5.1%	10.1%	5.8%	14.4%	3.3%
Girlfriend/ boyfriend	6.9%	6.4%	5.4%	11.7%	15.1%	4.5%	12.6%	2.3%
Same-sex partner	1.3%	1.2%	0.1%	1.1%	2.3%	1.8%	3.8%	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	980	3.13
US East	1664	2.40
Japan	916	3.24
Canada	532	4.25
Europe	300	5.66
Oceania	596	4.01
China	65	12.16
Korea	254	6.15
All MMAs	5,307	1.35

*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	511	4.34
US East	635	3.89
Japan	9	32.67
Canada	235	6.39
Europe	109	9.39
Oceania	65	12.16
China	1	98.00
Korea	8	34.65
All MMAs	1,573	2.47

*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	905	3.26
US East	963	3.16
Japan	27	18.86
Canada	630	3.90
Europe	213	6.71
Oceania	96	10.00
China	18	23.10
Korea	63	12.35
All MMAs	2,915	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	684	3.75
US East	908	3.25
Japan	593	4.02
Canada	305	5.61
Europe	150	8.00
Oceania	72	11.55
China	30	17.89
Korea	39	15.69
All MMAs	2,781	1.86

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