

Visitor Satisfaction Study

Q1 2020

Prepared for:
Hawai'i Tourism Authority

METHODOLOGY – OVERALL

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

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	2,348	2.02	18.99%
U.S. East	2,197	2.09	18.07%
Japan	2,199	2.09	77.59%
Canada	1,653	2.41	23.70%
Europe	332	5.38	19.94%
Oceania	307	5.59	18.64%
China	68	11.88	10.27%
Korea	303	5.63	33.22%
All MMAs	9,407	1.01	23.99%

*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 2020 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

METHODOLOGY – EFFECT OF COVID-19

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 a declining number of visitors to Hawai'i over the quarter from China and Korea, in particular. Therefore, the number of visitors from those MMAs who participated in the Quarter 1, 2020 VSAT survey is lower than average.

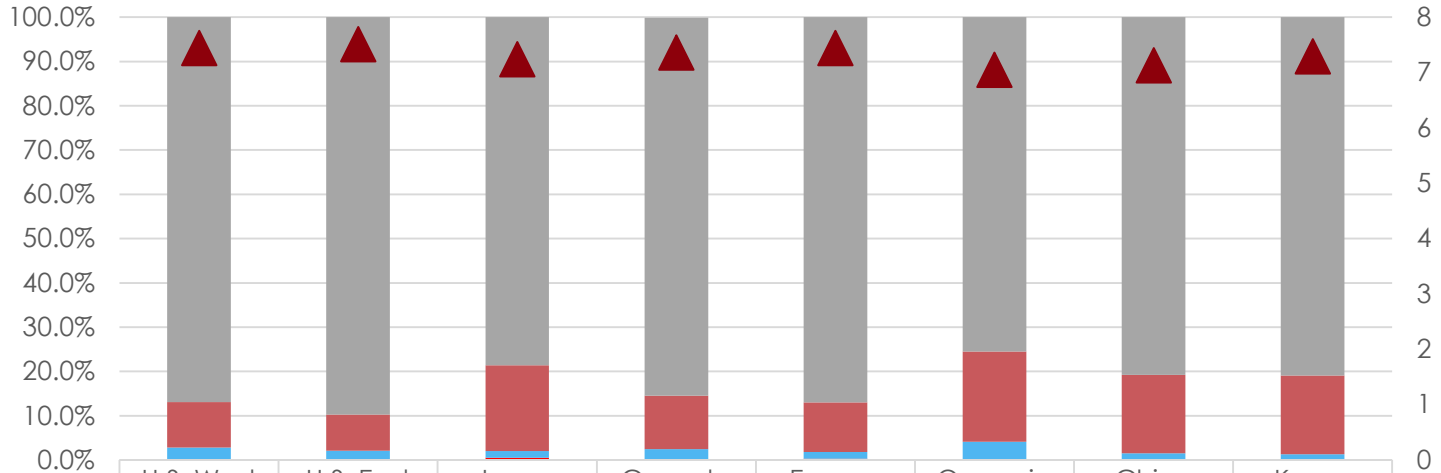
Carriers such as Asiana Airlines, Hawaiian Airlines and Korean Air drastically reduced the number of flights flying from Incheon International Airport starting from late February and early March. The only Chinese carrier with direct flights to Hawai'i, China Eastern Airlines, suspended its flights between Shanghai and Daniel K. Inouye International Airport on February 3. Japan Airlines suspended flights from Japan to Hawai'i on March 15.

Starting on Thursday, March 26, 2020, the State of Hawai'i required all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. As a result, on March 26, Hawaiian Airlines suspended flights from Japan to Hawai'i.

SECTION – VISITOR SATISFACTION

SATISFACTION – STATE OF HAWAI‘I BY MMA

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



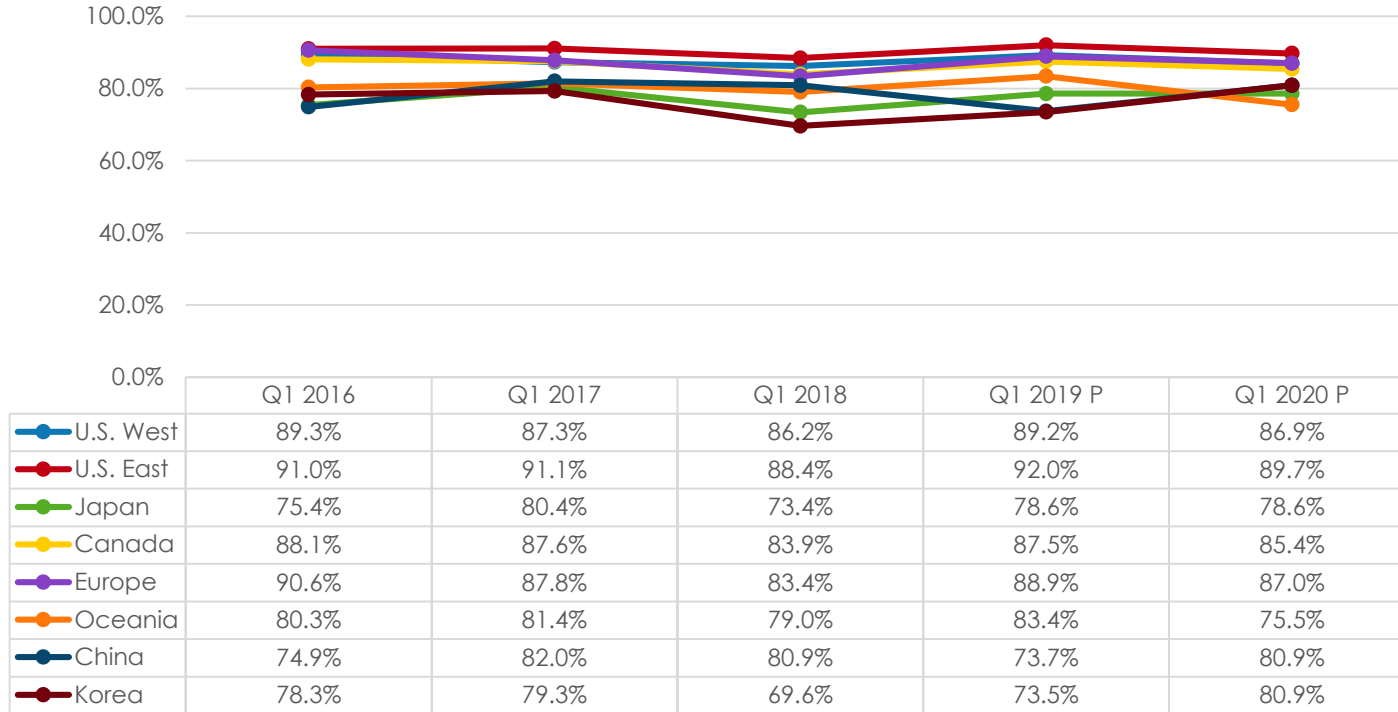
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	86.9%	89.7%	78.6%	85.4%	87.0%	75.5%	80.9%	80.9%
■ Above Avg (5-6)	10.3%	8.2%	19.4%	12.0%	11.2%	20.4%	17.7%	17.8%
■ Below Avg (3-4)	2.6%	2.0%	1.5%	2.3%	1.5%	4.1%	1.5%	1.3%
■ Poor (1-2)	0.2%	0.1%	0.5%	0.2%	0.3%	0.0%	0.0%	0.0%
BASE	2,348	2,197	2,199	1,653	332	307	68	303
▲ MEAN	7.44	7.51	7.24	7.36	7.44	7.05	7.13	7.29

SATISFACTION – STATE OF HAWAI'I BY MMA

- **Travel agent:** Visitors from Japan who consulted with a travel agent provided higher mean scores compared to those who did not use a travel agent.
- **First-time vs Repeat Visitors:** First-time visitors from U.S. West and Japan gave higher mean ratings than repeat visitors from these markets.
- **Age:** Younger travelers under the age of 35 from U.S. West and Japan tended to express higher levels of satisfaction with their trip than other age segments from these visitor markets.
- **Gender:** Female visitors from U.S. West were more likely to provide higher mean ratings overall than were males from this market.

SATISFACTION – STATE OF HAWAI‘I BY MMA

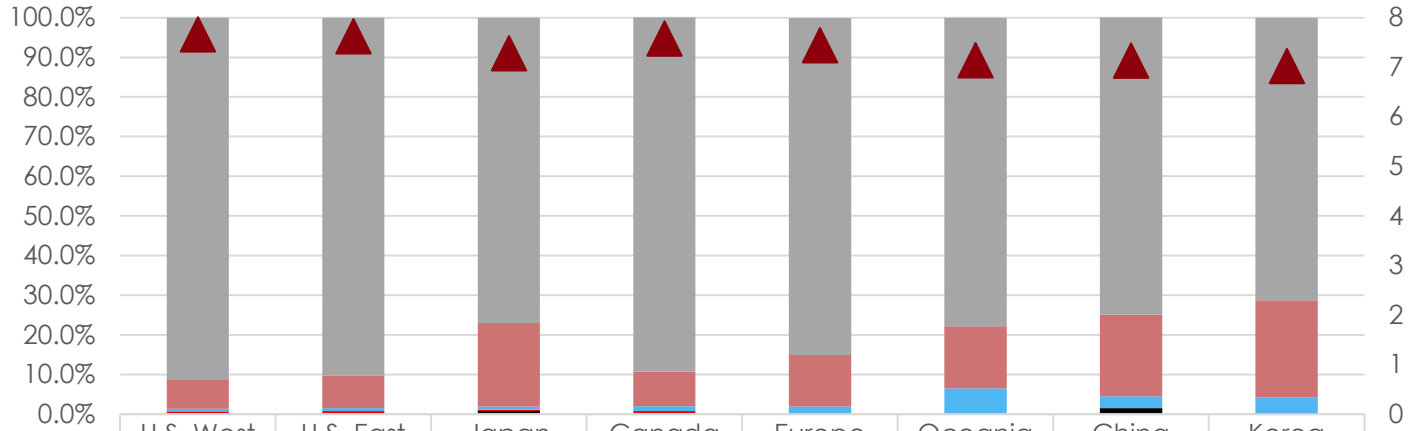
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

BRAND/DESTINATION – ADVOCACY

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



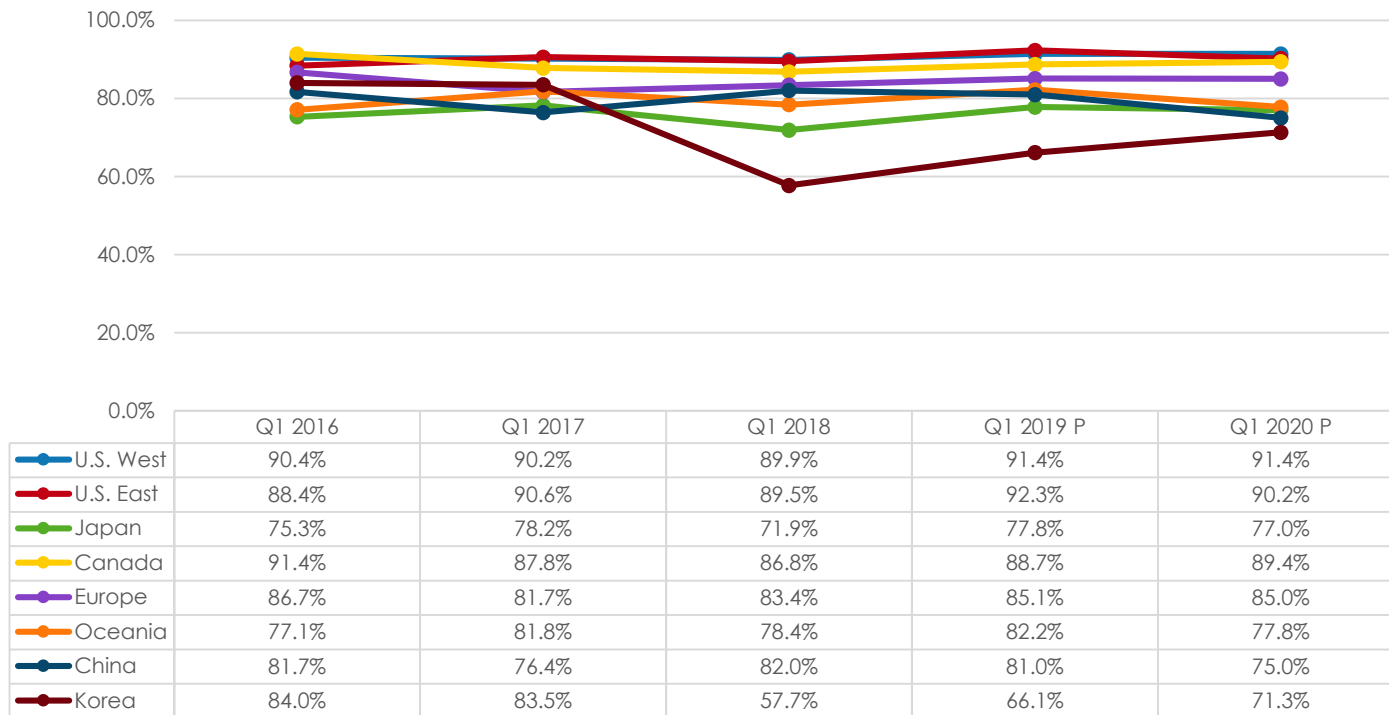
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	91.4%	90.2%	77.0%	89.4%	85.0%	77.8%	75.0%	71.3%
Somewhat likely (5-6)	7.2%	8.3%	21.1%	8.7%	13.0%	15.7%	20.6%	24.4%
Somewhat unlikely (3-4)	0.7%	0.7%	0.8%	1.2%	1.6%	6.2%	3.0%	4.0%
Very unlikely (1-2)	0.7%	0.7%	0.3%	0.6%	0.3%	0.3%	0.0%	0.0%
Not Sure	0.0%	0.1%	0.8%	0.2%	0.0%	0.0%	1.5%	0.3%
BASE	2,348	2,197	2,199	1,653	332	307	68	303
MEAN	7.66	7.62	7.28	7.58	7.44	7.14	7.13	7.02

BRAND/DESTINATION – ADVOCACY

- **First-time vs. Repeat:** Repeat visitors from Oceania, U.S. East, and U.S. West were more likely to recommend Hawai'i to others than were first-time visitors from these markets.
- **Visited single island vs. Multi-Island visit:** Visitors from U.S. West who visited a single island during their trip were more likely to recommend Hawai'i than were those who visited multiple islands during this stay.
- **Gender:** Female travelers from the following visitor markets were more likely to recommend Hawai'i than their male counterparts: U.S. West, U.S. East, Canada, and Japan.
- **Age:** Younger travelers under the age of 35 from Japan and Korea were more likely to recommend Hawai'i compared to older travelers from these visitor markets.
- **Household income:** Less affluent travelers from Oceania were more likely to recommend visiting Hawai'i than were those in households earning in excess of \$100K.

BRAND/DESTINATION – ADVOCACY

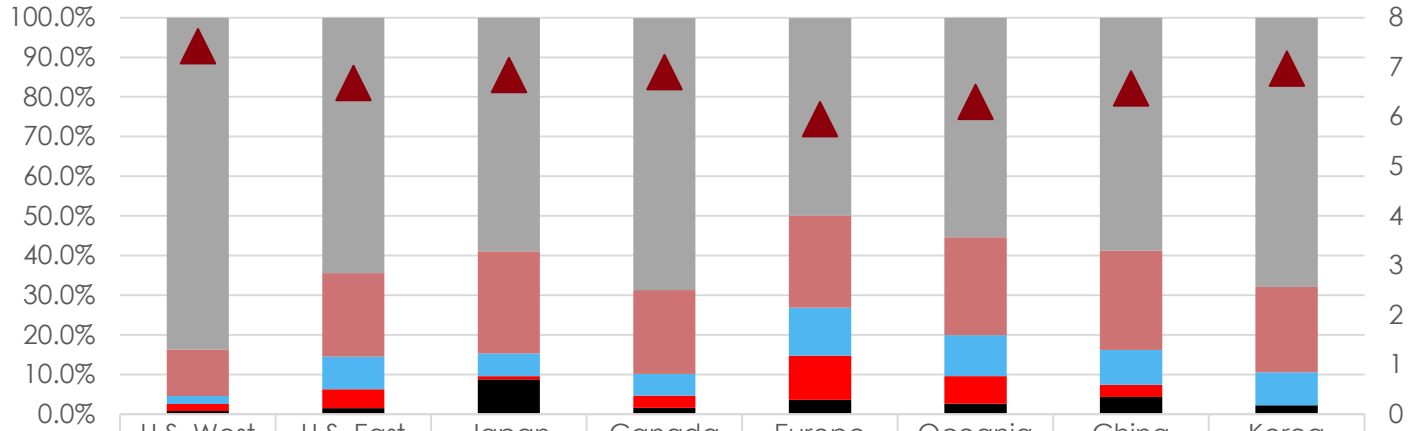
TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



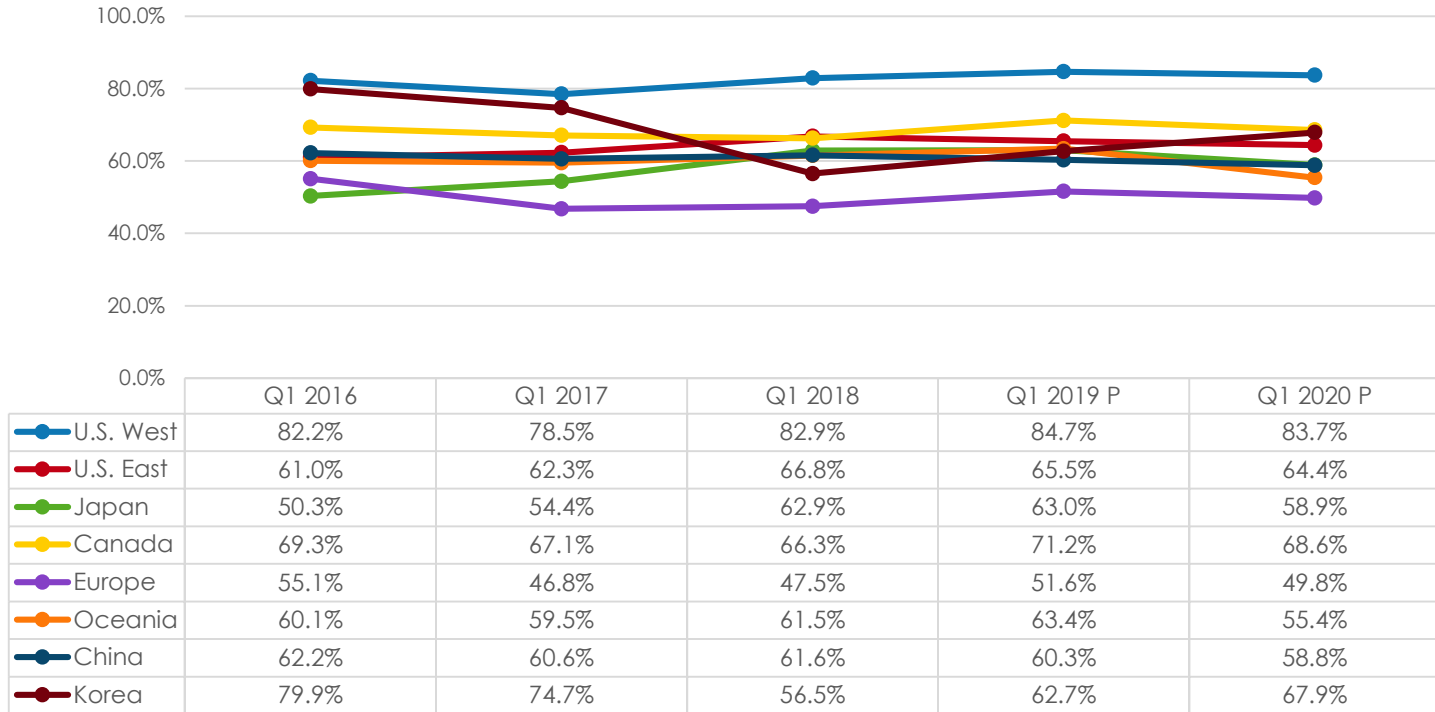
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	83.7%	64.4%	58.9%	68.6%	49.8%	55.4%	58.8%	67.9%
■ Somewhat likely (5-6)	11.7%	21.1%	25.8%	21.1%	23.2%	24.7%	25.0%	21.5%
■ Somewhat unlikely (3-4)	2.0%	8.2%	5.7%	5.5%	12.1%	10.3%	8.8%	8.3%
■ Very unlikely (1-2)	1.8%	4.8%	0.8%	3.1%	11.2%	6.9%	3.0%	0.0%
■ Not Sure	0.8%	1.5%	8.8%	1.6%	3.6%	2.7%	4.4%	2.3%
BASE	2,348	2,197	2,199	1,653	332	307	68	303
▲ MEAN	7.42	6.68	6.84	6.90	5.95	6.30	6.57	6.97

LIKELIHOOD OF RETURN VISIT

- **First-time vs. Repeat:** Repeat visitors from the following visitor markets expressed a greater likelihood to return to Hawai'i than first-time visitors: U.S. West, U.S. East, Japan, Canada, Europe, Korea, and Oceania.
- **Visited single island vs. Multi-Island visit:** Travelers from the following visitor markets who visited a single island during their trip expressed a greater likelihood to return to Hawai'i compared to those visiting multiple islands: U.S. West, U.S. East, Canada, and Oceania.
- **Age:** Middle-aged visitors (between 35 and 64 years old) from U.S. West and U.S. East appeared more likely to return to Hawai'i than younger visitors and seniors from these visitor markets. Among Japanese visitors, those under the age of 35 were the least likely to return.
- **Household income:** More affluent visitors or those in households earning in excess of \$100K from U.S. West and U.S. East expressed a greater likelihood to return to Hawai'i compared to visitors from these markets in households earning below \$100K.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q1 2019 P	Q1 2020 P
50.7% Too expensive	42.5% Too expensive
48.0% Want to go someplace new	28.7% Too crowded/ congested/ traffic
30.9% Too crowded/ congested/ traffic	27.7% Want to go someplace new
27.9% Too commercialized/ overdeveloped	26.0% Poor value
20.1% Poor value	21.3% Flight too long
19.7% Other financial obligations	20.4% Too commercialized/ overdeveloped
16.1% Five years is too soon	16.6% Five years is too soon to revisit
15.2% No reason to return/ Nothing new	13.9% No reason to return/ Nothing new
14.1% Flight is too long	11.1% Unfriendly people/ felt unwelcome

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q1 2019 P	Q1 2020 P
49.4% Too expensive	45.6% Want to go someplace new
46.6% Want to go someplace new	44.7% Too expensive
44.9% Flight is too long	40.3% Flight too long
21.6% Five years is too soon	16.3% Other financial obligations
15.1% Other financial obligations	16.2% Too crowded/ congested/ traffic
11.1% Poor value	15.2% Five years is too soon
11.1% Too crowded/ congested/ traffic	14.2% Poor value
	11.0% Too commercialized/ overdeveloped

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q1 2019 P	Q1 2020 P
37.6% Too expensive	34.7% Too expensive
34.8% Want to go someplace new	30.1% Five years is too soon
23.6% Five years is too soon	28.7% Want to go someplace new
21.9% Other financial obligations	27.6% Other financial obligations
18.0% Flight is too long	14.8% Flight too long
10.1% No reason to return/ Nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CANADA

Q1 2019 P	Q1 2020 P
58.6% Too expensive	49.4% Too expensive
41.1% Want to go someplace new	47.3% Want to go someplace new
35.4% Flight is too long	31.2% Flight too long
22.8% Poor value	20.2% Poor value
17.3% Five years is too soon	16.4% Five years is too soon
16.7% Too commercialized/ overdeveloped	15.2% Too crowded/ congested/ traffic
15.4% Too crowded/ congested/ traffic	14.4% Too commercialized/ overdeveloped
10.7% Other financial obligations	12.2% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS EUROPE

Q1 2019 P	Q1 2020 P
66.7% Flight is too long	57.5% Flight is too long
52.9% Too expensive	42.2% Too expensive
31.3% Want to go someplace new	29.4% Want to go someplace new
21.5% Too commercialized/ overdeveloped	16.3% Other financial obligations
15.7% Poor value	14.1% Poor value
11.7% Five years is too soon	13.4% Five years is too soon
11.7% Other financial obligations	

P= Preliminary Data



UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q1 2019 P	Q1 2020 P
69.4% Want to go someplace new	56.6% Too expensive
43.3% Too expensive	44.3% Want to go someplace new
30.3% Poor value	39.9% Poor value
22.1% Five years is too soon	24.9% Too commercialized/ overdeveloped
22.1% Too commercialized/ overdeveloped	17.7% Too crowded/ congested/ traffic
19.9% No reason to return/ Nothing new	15.3% Flight too long
15.3% Flight is too long	12.0% No reason to return/ Nothing new

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CHINA

Q1 2019 P	Q1 2020 P
63.8% Want to go someplace new	63.8% Flight too long
53.6% Flight is too long	54.4% Five years is too soon
34.8% Five years is too soon	36.4% Want to go someplace new
34.8% Poor value	27.1% Nothing new/ No reason to return
23.2% No reason to return/ Nothing new	18.2% Too expensive
23.2% Too expensive	
11.6% Old age/ poor health	
11.6% Too commercialized/ overdeveloped	

P= Preliminary Data

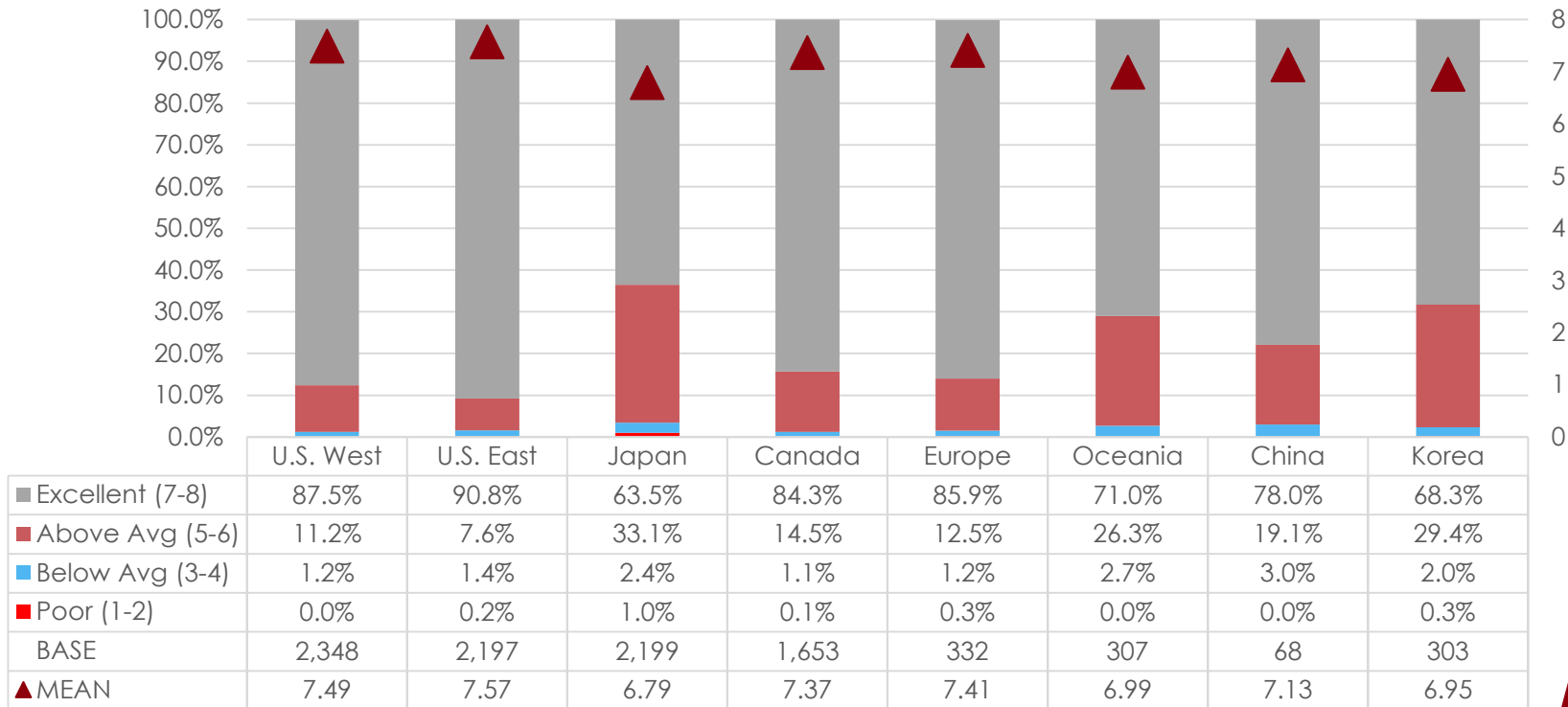
UNLIKELY TO RETURN – TOP REASONS KOREA

Q1 2019 P	Q1 2020 P
55.3% Too expensive	62.5% Too expensive
48.9% Poor value	34.4% Flight is too long
21.9% Five years is too soon	31.4% Poor value
18.6% No reason to return/ Nothing new	21.8% Five years is too soon
18.6% Unfriendly people	15.5% Too crowded/ congested/ traffic
17.7% Want to go someplace new	12.6% No reason to return/ nothing new
17.7% Other financial obligations	12.5% Other financial obligations
16.7% Flight is too long	
13.5% Too crowded/ congested/ traffic	
13.5% Poor service	

P= Preliminary Data

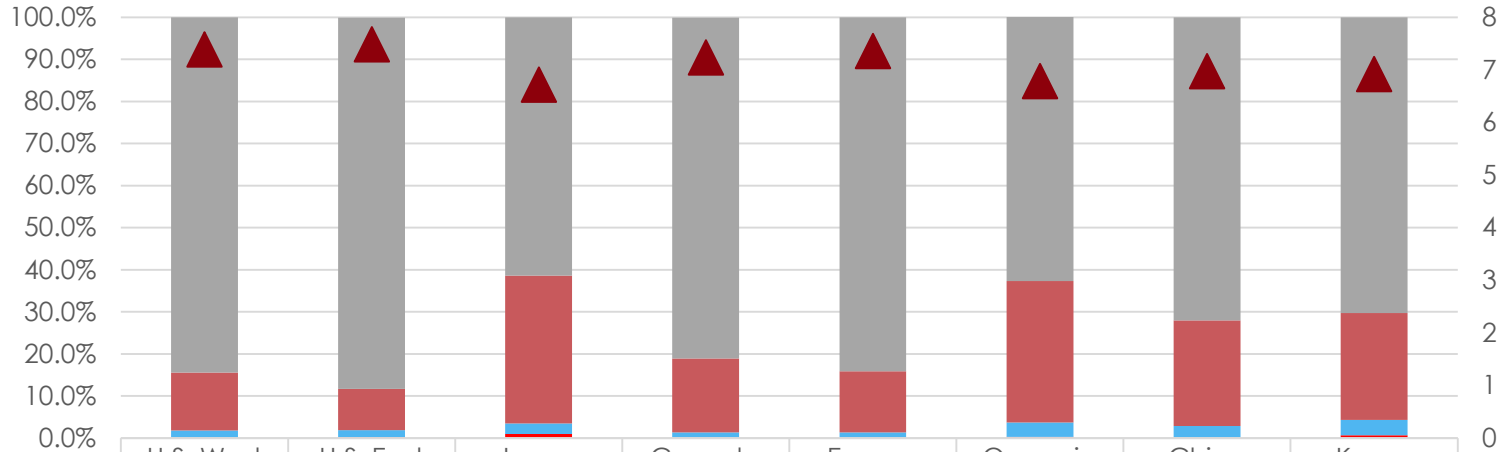
OFFERING A VARIETY OF EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

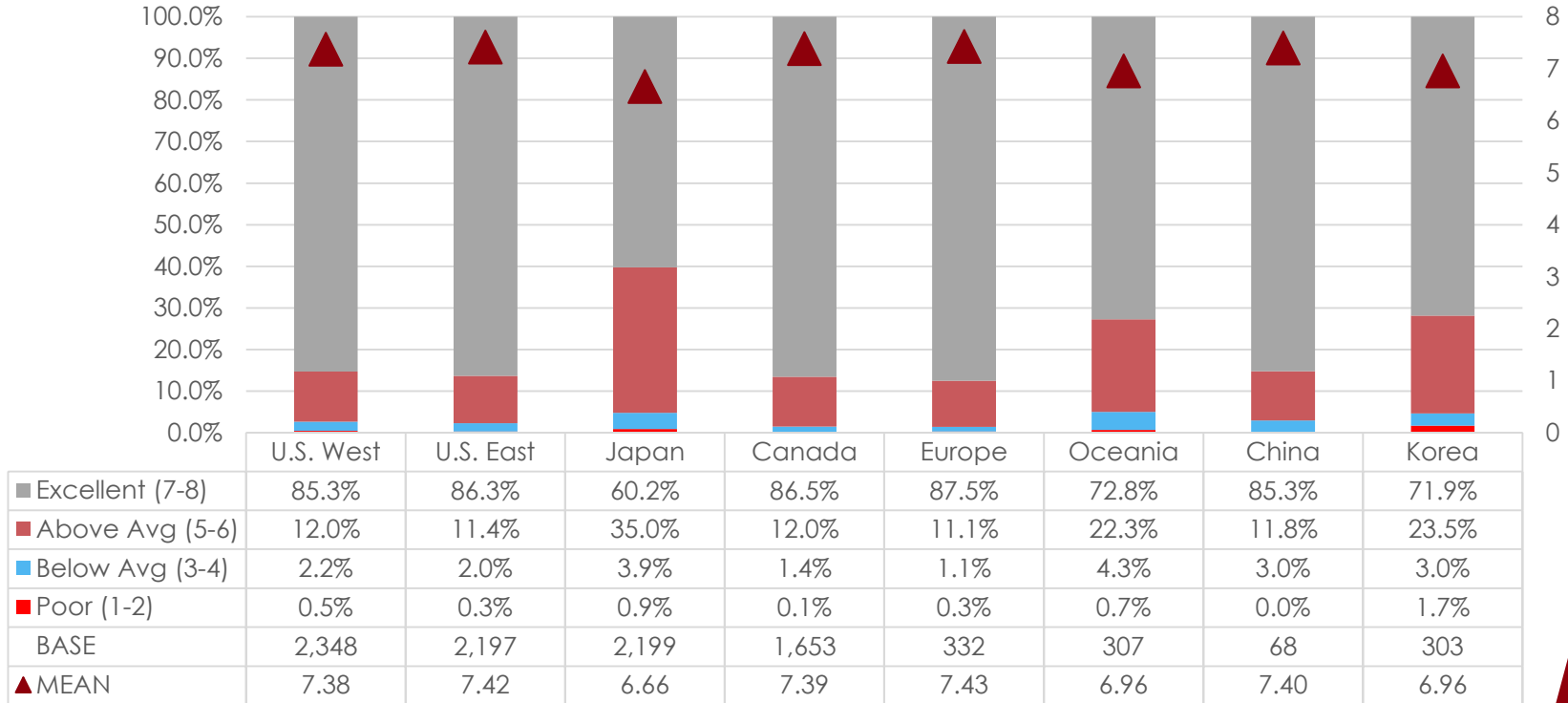
8-pt Rating Scale
8=Excellent / 1=Poor



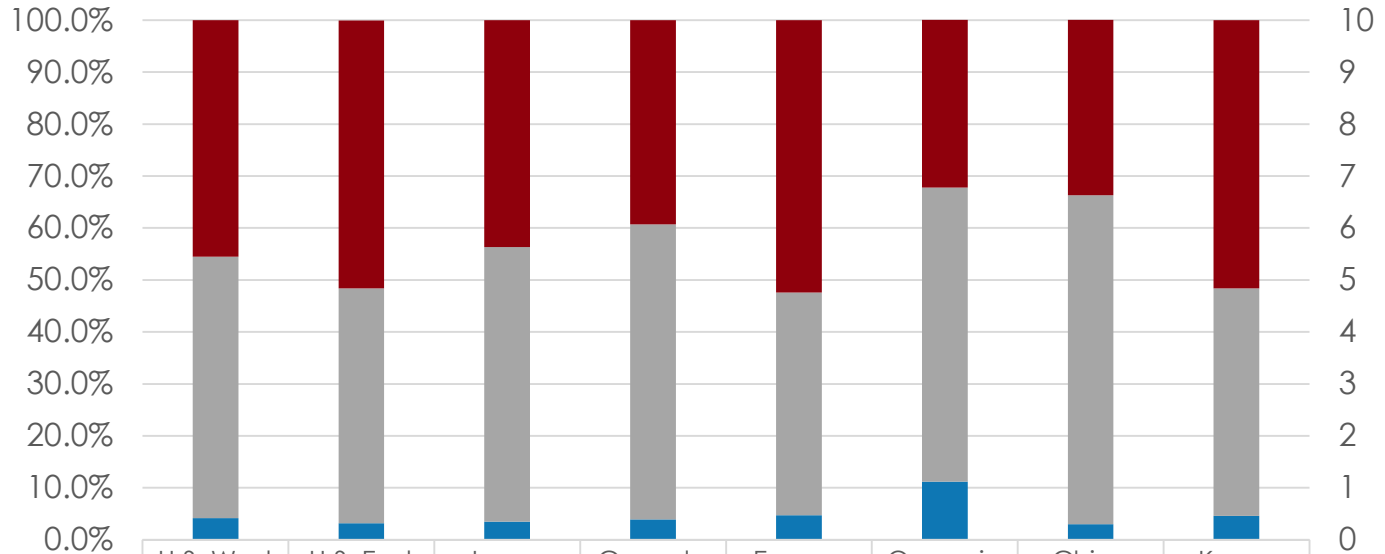
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	84.4%	88.2%	61.4%	81.0%	84.1%	62.8%	72.0%	70.3%
■ Above Avg (5-6)	13.8%	9.8%	35.1%	17.5%	14.5%	33.6%	25.1%	25.4%
■ Below Avg (3-4)	1.7%	1.7%	2.5%	1.3%	1.4%	3.4%	2.9%	3.6%
■ Poor (1-2)	0.1%	0.2%	1.0%	0.1%	0.0%	0.3%	0.0%	0.7%
BASE	2,348	2,197	2,199	1,653	332	307	68	303
▲ MEAN	7.39	7.49	6.72	7.24	7.36	6.79	6.98	6.92

BEING A SAFE AND SECURE DESTINATION

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



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



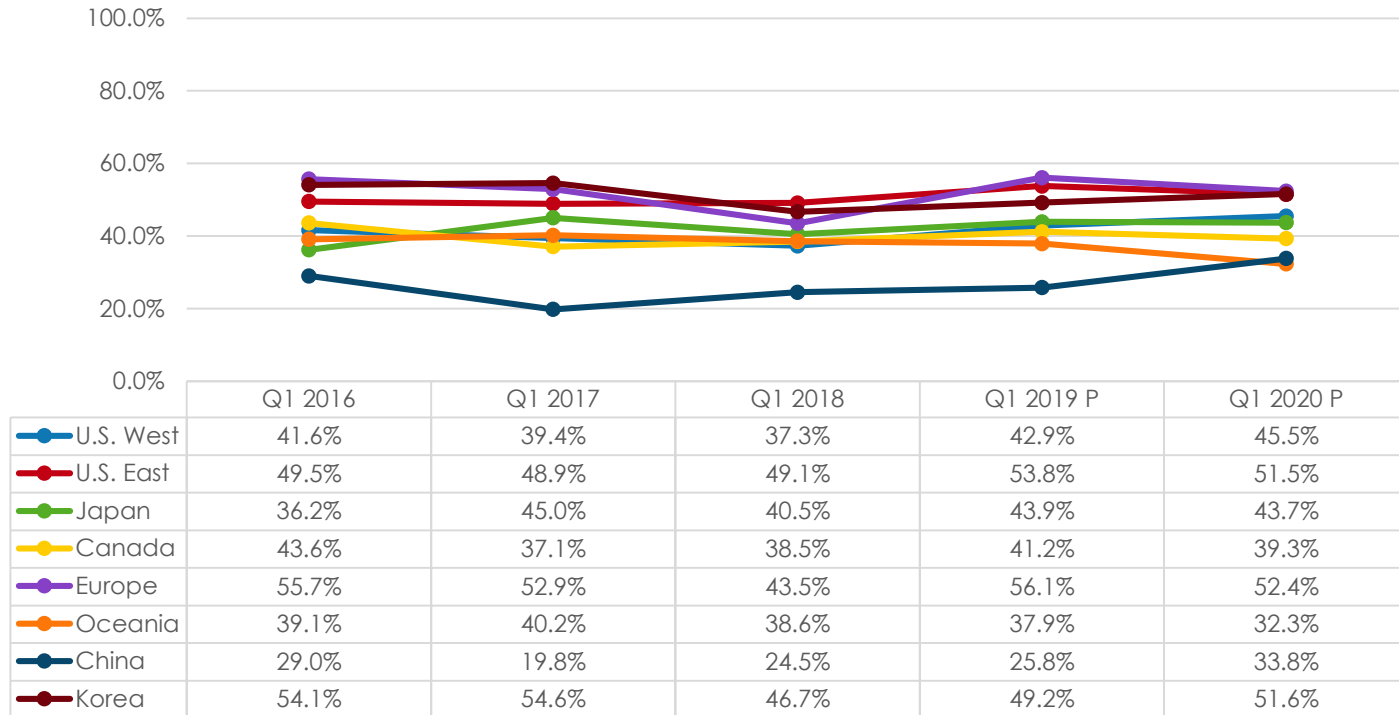
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Exceeded expectations	45.5%	51.5%	43.7%	39.3%	52.4%	32.3%	33.8%	51.6%
Met expectations	50.3%	45.2%	52.8%	56.8%	42.9%	56.6%	63.3%	43.8%
Did NOT meet expectations	4.2%	3.2%	3.5%	3.9%	4.7%	11.2%	3.0%	4.6%
BASE	2,348	2,197	2,199	1,653	332	307	68	303

SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **First-time vs. Repeat:** First-time visitors from U.S. West, U.S. East, Japan, and Canada were more likely to feel that this trip exceeded their expectations compared to repeat travelers from these visitor markets.
- **Travel agent:** Visitors from Japan who used a travel agent were more likely to indicate their trip exceeded their expectations than were travelers from Japan who did not consult with a travel agent.
- **Age:** Younger travelers from U.S. West, U.S. East, Japan, and Canada tended to be more satisfied with their trip in terms of expectations than older travelers from these visitor markets, particularly seniors who appeared less satisfied in this area.
- **Gender:** Female travelers from U.S. West, U.S. East, and Canada were more likely to agree that their trip exceeded their expectations than were males from these visitor markets.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



P= Preliminary Data

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.6%	97.1%	94.0%	95.7%	95.1%	91.5%	94.2%	97.4%
On own (self-guided)	85.0%	79.9%	63.3%	84.0%	68.2%	55.3%	55.9%	77.8%
Helicopter/ airplane	3.2%	4.1%	1.1%	3.6%	8.2%	1.5%	26.5%	2.3%
Boat/ submarine/ whale	29.5%	35.4%	12.6%	28.0%	38.6%	19.5%	29.5%	20.6%
Visit towns/communities	55.1%	53.7%	29.0%	58.2%	47.6%	30.8%	31.0%	36.7%
Limo/ van/ bus tour	7.7%	16.6%	21.3%	9.3%	18.6%	28.2%	22.1%	17.9%
Scenic views/ natural landmark	62.7%	67.4%	18.0%	63.7%	60.6%	47.7%	61.9%	61.0%
Movie/ TV/ film location	3.6%	6.0%	4.4%	3.8%	7.9%	9.2%	41.2%	22.2%

ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.8%	95.9%	94.4%	98.4%	96.6%	94.5%	95.6%	99.0%
Beach/ sunbathing	81.8%	80.4%	69.5%	90.0%	77.4%	74.0%	78.0%	82.5%
Bodyboarding	8.3%	5.3%	1.5%	12.5%	5.4%	4.0%	2.9%	2.0%
Standup paddle board	4.9%	4.2%	1.5%	3.8%	5.0%	6.3%	2.9%	6.3%
Surfing	4.0%	4.2%	2.9%	7.5%	7.6%	8.0%	4.4%	9.3%
Canoeing/ kayak	6.7%	5.9%	2.1%	5.9%	7.1%	2.2%	0.0%	3.3%
Swim in the ocean	60.1%	56.4%	29.8%	69.8%	62.9%	63.5%	26.5%	49.3%
Snorkeling	41.0%	34.7%	14.3%	46.8%	36.6%	28.6%	20.6%	44.8%
Freediving	1.5%	0.8%	0.5%	1.0%	0.9%	0.0%	8.8%	1.3%
Windsurf/ Kitesurf	0.0%	0.1%	0.2%	0.3%	0.5%	0.4%	0.0%	0.3%
Jet ski/ Parasail	0.6%	0.8%	2.9%	0.5%	0.0%	1.7%	1.4%	5.0%
Scuba diving	2.6%	2.5%	1.9%	3.3%	3.2%	0.0%	1.5%	2.3%
Fishing	3.6%	2.7%	0.4%	2.2%	0.9%	2.4%	3.0%	1.3%
Golf	7.3%	7.7%	7.0%	9.2%	3.0%	1.9%	3.0%	7.2%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.8%	95.9%	94.4%	98.4%	96.6%	94.5%	95.6%	99.0%
Run/ Jog/ Fitness walk	34.7%	31.9%	16.9%	37.1%	24.0%	26.2%	19.1%	11.9%
Spa	8.4%	9.1%	6.9%	4.9%	7.2%	5.8%	3.0%	3.7%
Hiking	42.7%	45.5%	18.3%	45.2%	38.6%	21.3%	38.2%	25.4%
Backpack/ camp	1.4%	1.5%	0.2%	3.0%	2.0%	1.1%	7.3%	0.7%
Agritourism	13.8%	14.5%	11.6%	11.6%	9.2%	9.6%	28.1%	26.5%
Sport event/ tournament	1.8%	1.7%	1.2%	2.9%	1.3%	2.0%	0.0%	1.7%
Park/ botanical garden	35.4%	40.2%	16.8%	39.9%	37.7%	27.5%	42.7%	26.8%
Waterpark	1.3%	0.9%	1.8%	1.1%	1.1%	0.6%	10.3%	3.6%
Mountain tube/ waterfall rappel	1.5%	1.0%	0.5%	1.5%	1.9%	1.0%	0.0%	1.7%
Zip-lining	3.6%	2.9%	0.9%	1.9%	1.4%	2.4%	0.0%	1.7%
Skydiving	0.2%	0.2%	1.1%	0.3%	0.7%	0.0%	2.9%	1.3%
All terrain vehicle (ATV)	2.9%	3.1%	1.2%	2.0%	3.5%	3.9%	13.3%	10.0%
Horseback riding	1.6%	1.8%	2.9%	1.6%	0.6%	0.7%	5.9%	1.7%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	99.1%	98.0%	97.1%	99.2%	97.8%	99.4%	95.6%	99.0%
Lunch/ sunset/ dinner/ evening cruise	19.5%	23.4%	16.2%	20.0%	31.6%	17.2%	54.3%	35.8%
Live music/ stage show	28.9%	34.7%	15.3%	30.3%	28.6%	20.4%	16.1%	14.5%
Nightclub/ dancing/ bar/ karaoke	9.3%	10.1%	5.6%	6.5%	10.4%	6.6%	1.4%	5.0%
Fine dining	51.4%	52.7%	35.5%	46.2%	44.4%	34.8%	42.6%	44.7%
Family restaurant	60.5%	58.1%	26.0%	64.3%	41.2%	71.1%	30.8%	48.0%
Fast food	34.4%	32.0%	56.3%	45.4%	41.2%	52.4%	51.6%	62.7%
Food truck	31.3%	29.5%	15.6%	32.5%	24.1%	24.3%	14.7%	60.0%
Café/ coffee house	47.9%	43.4%	50.0%	52.5%	50.8%	65.1%	30.9%	59.9%
Ethnic dining	28.6%	31.5%	6.0%	22.9%	19.0%	15.7%	30.9%	25.1%
Prepared own meal	54.7%	44.3%	14.6%	66.9%	39.3%	25.7%	25.0%	21.1%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.9%	95.6%	97.8%	97.9%	94.5%	97.5%	95.6%	96.3%
Mall/ department store	36.1%	35.5%	81.6%	55.1%	52.8%	76.3%	67.7%	82.8%
Designer boutique	16.5%	18.6%	25.1%	19.2%	13.6%	22.2%	4.4%	6.0%
Hotel/ resort store	31.4%	38.3%	33.8%	27.9%	30.4%	30.7%	20.6%	25.1%
Swap meet/ flea market	16.2%	14.7%	3.1%	18.7%	6.1%	9.0%	1.5%	3.0%
Discount/ outlet store	15.3%	15.5%	25.3%	23.6%	17.0%	42.3%	33.9%	63.3%
Supermarket	70.7%	58.0%	69.3%	75.2%	68.6%	54.9%	67.7%	64.2%
Farmer's market	40.4%	29.6%	15.2%	43.5%	31.1%	17.2%	13.2%	12.2%
Convenience store	45.9%	46.9%	47.5%	54.3%	36.5%	67.3%	47.1%	60.9%
Duty free store	2.6%	3.5%	38.4%	4.7%	7.1%	7.1%	49.9%	41.8%
Local shop/ artisan	62.8%	66.2%	11.9%	65.5%	59.1%	47.3%	24.9%	19.8%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	67.4%	76.3%	53.3%	68.6%	76.1%	70.0%	82.4%	66.9%
Historic military site	18.2%	27.7%	14.8%	16.4%	34.4%	41.2%	54.5%	16.5%
Other historical site	29.5%	32.1%	14.3%	29.3%	31.0%	20.8%	30.9%	25.8%
Museum/ art gallery	19.4%	16.7%	6.1%	17.7%	18.5%	15.3%	23.5%	7.6%
Luau/ Polynesian show/ hula show	23.6%	37.5%	13.3%	28.8%	27.9%	26.6%	10.3%	30.1%
Lesson- ex. ukulele, hula, canoe, lei making	6.9%	7.3%	7.0%	7.1%	5.2%	8.6%	5.9%	7.0%
Play/ concert/ theatre	4.5%	4.1%	3.1%	4.6%	5.4%	3.2%	3.0%	4.7%
Art/ craft fair	14.2%	12.0%	4.4%	14.0%	8.9%	5.5%	14.7%	4.6%
Festival event	4.1%	4.5%	2.2%	4.9%	4.0%	2.4%	3.0%	1.7%

ACTIVITIES – TRANSPORTATION

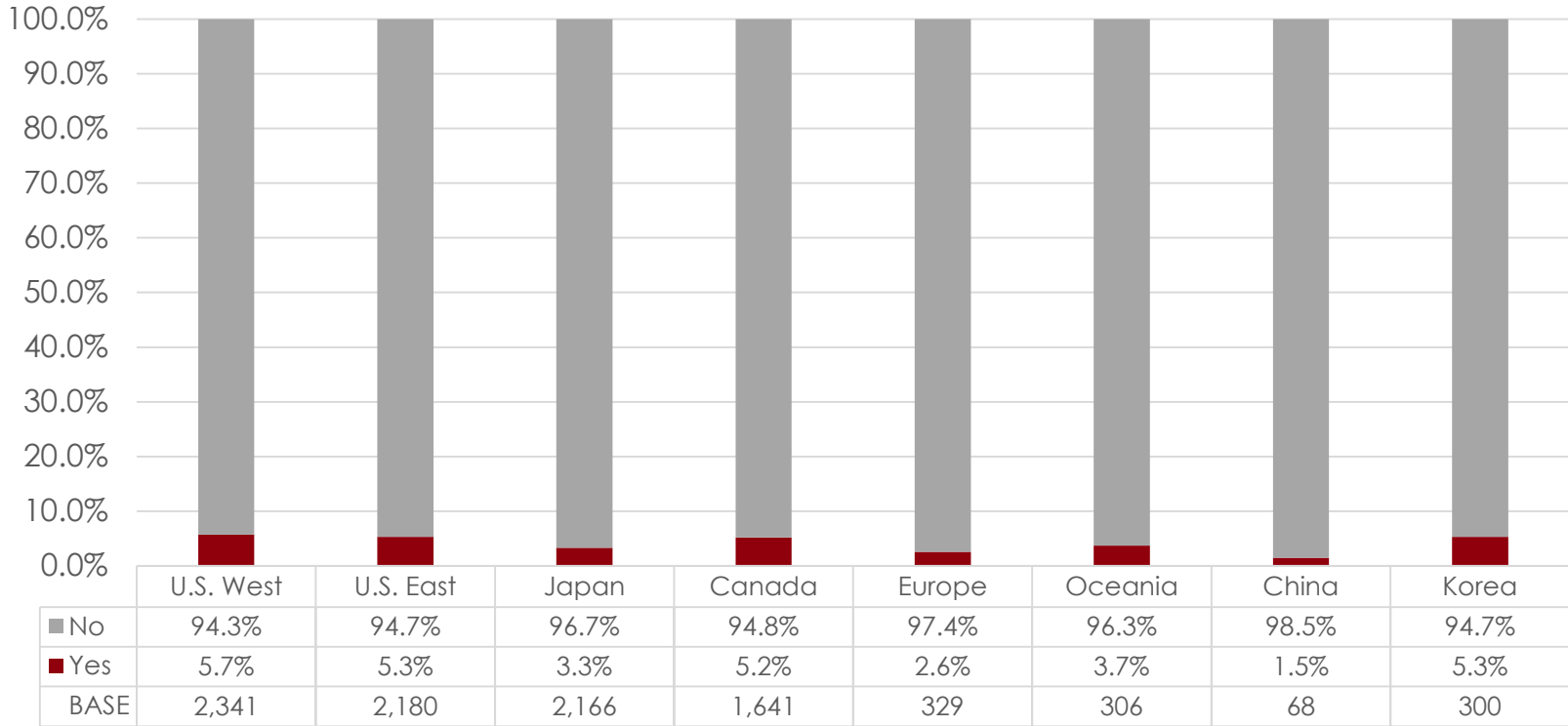
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	94.7%	93.4%	96.9%	97.4%	95.3%	97.7%	88.3%	98.3%
Airport shuttle	14.7%	16.1%	28.0%	19.8%	23.4%	41.0%	11.7%	15.2%
Trolley	2.5%	3.6%	53.6%	6.7%	4.5%	21.5%	5.9%	27.2%
Public bus	4.5%	5.4%	15.9%	12.1%	14.9%	24.0%	17.6%	14.2%
Tour bus/ tour van	8.4%	20.0%	27.6%	11.8%	20.5%	36.1%	13.3%	30.8%
Taxi/ limo	5.7%	9.3%	27.9%	14.7%	24.4%	35.2%	20.6%	24.8%
Rental car	80.9%	72.9%	23.2%	80.3%	60.8%	39.0%	55.9%	61.5%
Ride share	16.2%	18.3%	5.4%	12.6%	18.0%	27.6%	16.2%	17.9%
Bicycle rental	2.0%	1.5%	4.1%	3.7%	2.6%	1.6%	1.5%	1.6%

ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	33.2%	28.4%	13.5%	23.7%	19.0%	6.5%	16.2%	19.5%
Visit friends/ family	32.5%	27.5%	12.4%	22.8%	17.8%	6.5%	16.2%	19.5%
Volunteer non-profit	1.3%	1.2%	1.3%	1.3%	1.8%	0.7%	0.0%	0.3%

SECTION – TRAVELERS WITH DISABILITIES

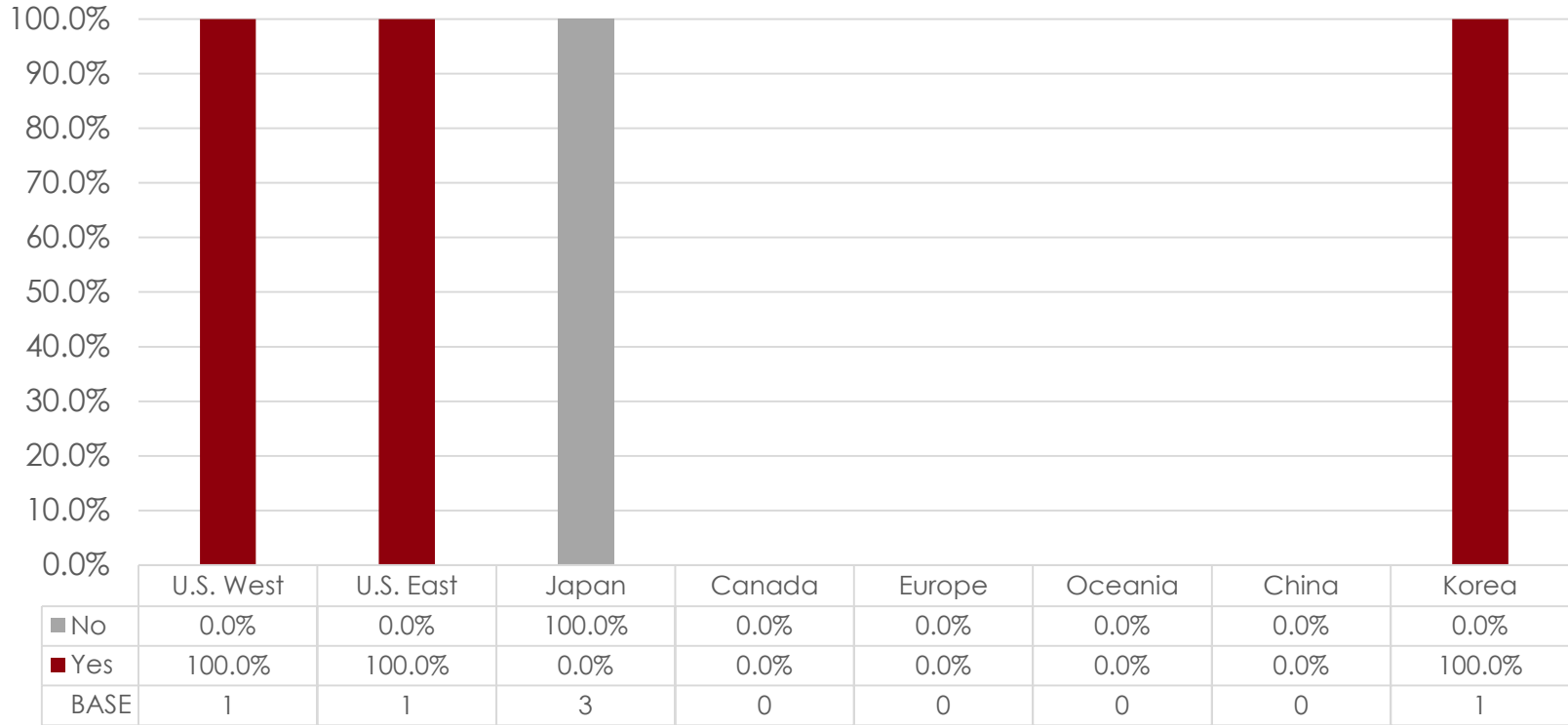
DISABLED TRAVELER – REQUIRED ASSISTANCE



DISABLED TRAVELER – REQUIRED ASSISTANCE

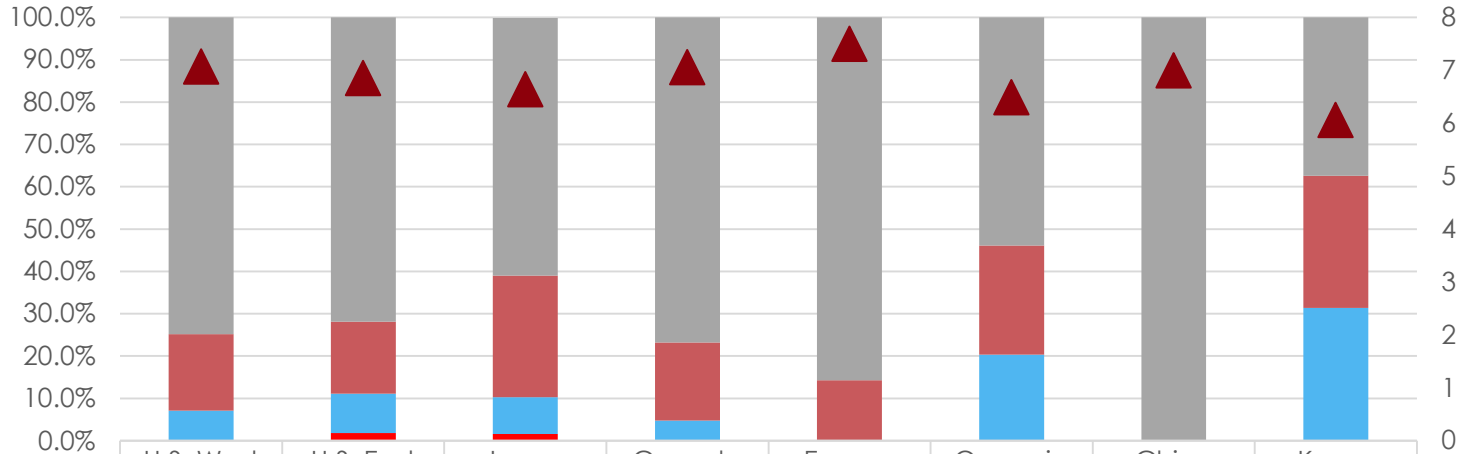
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Mobility aid	72.0%	80.3%	14.7%	73.1%	90.3%	77.4%	0.0%	31.4%
Personal assistance	24.2%	16.0%	4.4%	19.7%	19.4%	31.3%	100.0%	12.5%
No one required assistance	5.3%	8.2%	48.2%	8.4%	0.0%	11.3%	0.0%	31.2%
Orientation and mobility assistance	1.5%	2.7%	15.7%	6.0%	12.9%	0.0%	0.0%	0.0%
ASL interpreter/ text/ captioning	2.3%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Lift equipped van	0.0%	0.0%	10.4%	1.3%	0.0%	8.7%	0.0%	6.2%
Print material in alternate format	1.5%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	12.6%
Service assistance animal	0.8%	0.8%	4.4%	0.0%	0.0%	0.0%	0.0%	6.3%
Other	0.8%	0.9%	1.6%	0.0%	0.0%	0.0%	0.0%	6.2%
BASE	132	112	73	81	9	10	1	16

DISABLED TRAVELER – SERVICE/ ASSISTANCE ANIMAL



OVERALL ACCESSIBILITY – AIRPORTS

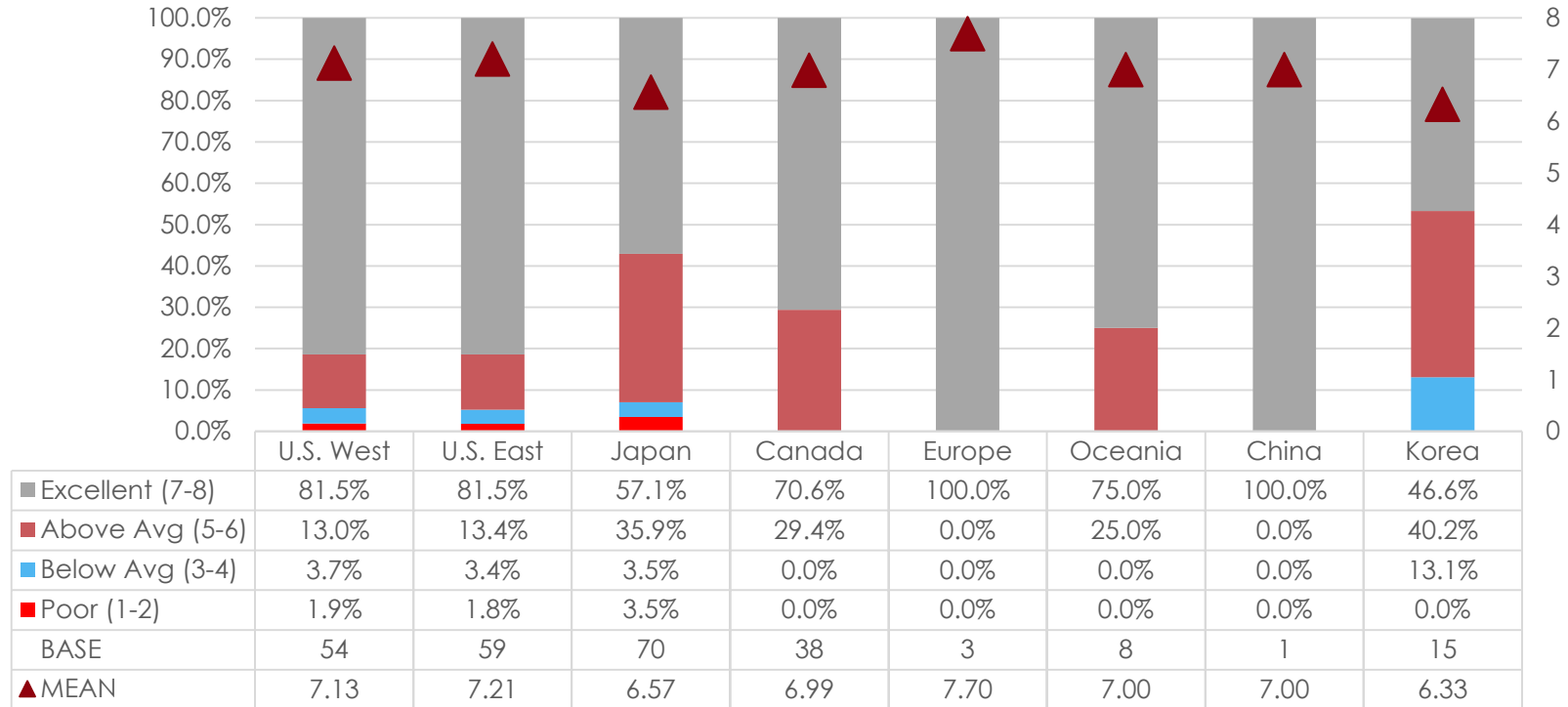
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	74.8%	72.0%	60.9%	76.8%	85.7%	53.9%	100.0%	37.4%
■ Above Avg (5-6)	18.1%	17.0%	28.7%	18.4%	14.3%	25.8%	0.0%	31.2%
■ Below Avg (3-4)	7.1%	9.3%	8.7%	4.8%	0.0%	20.3%	0.0%	31.4%
■ Poor (1-2)	0.0%	1.8%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	127	111	73	81	8	11	1	16
▲ MEAN	7.07	6.85	6.64	7.06	7.50	6.49	7.00	6.06

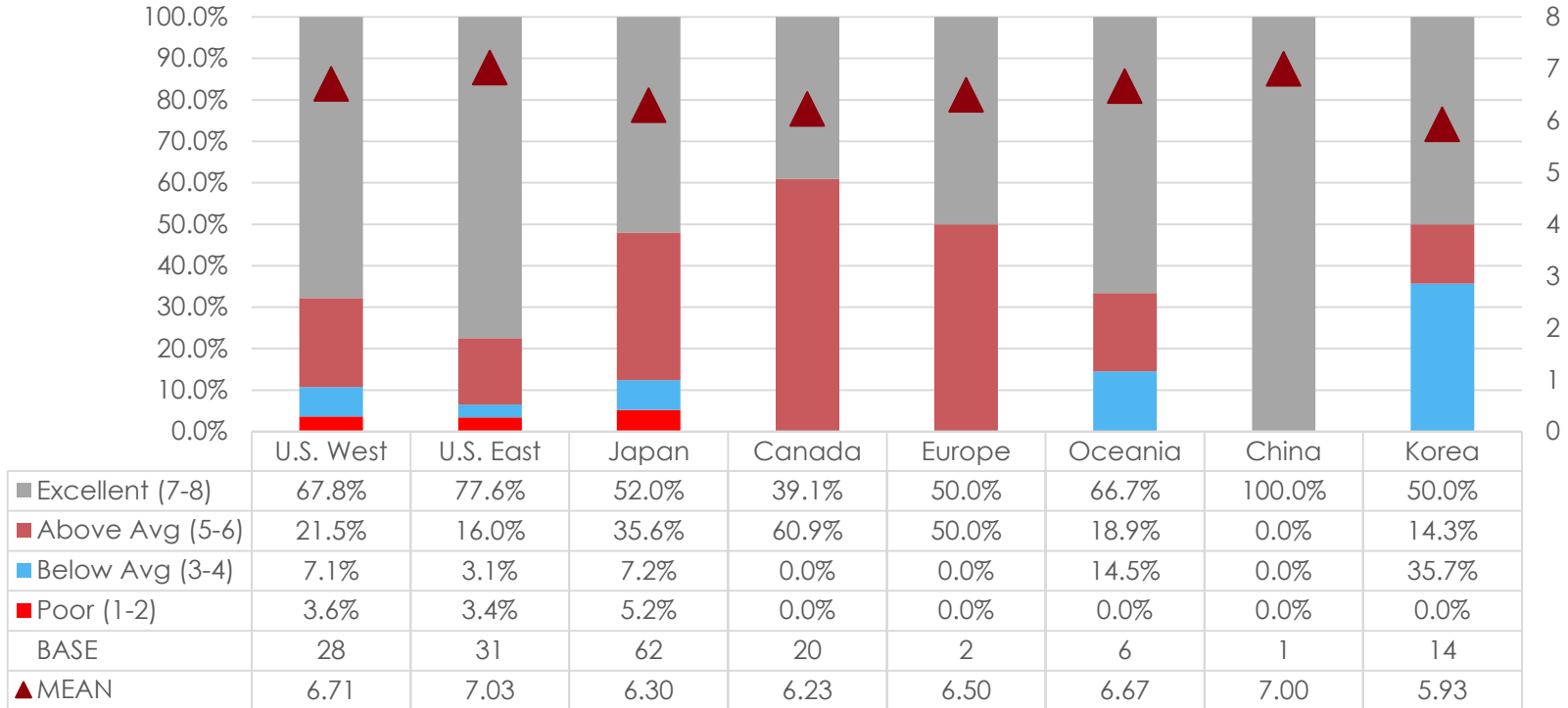
OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

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



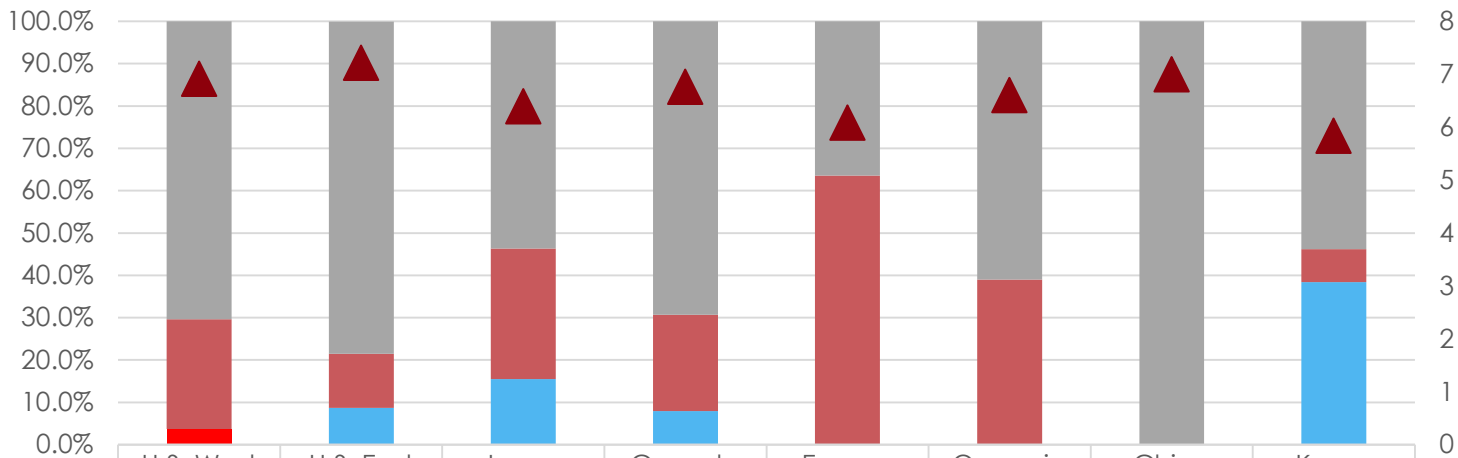
OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



OVERALL ACCESSIBILITY – RIDE SHARE

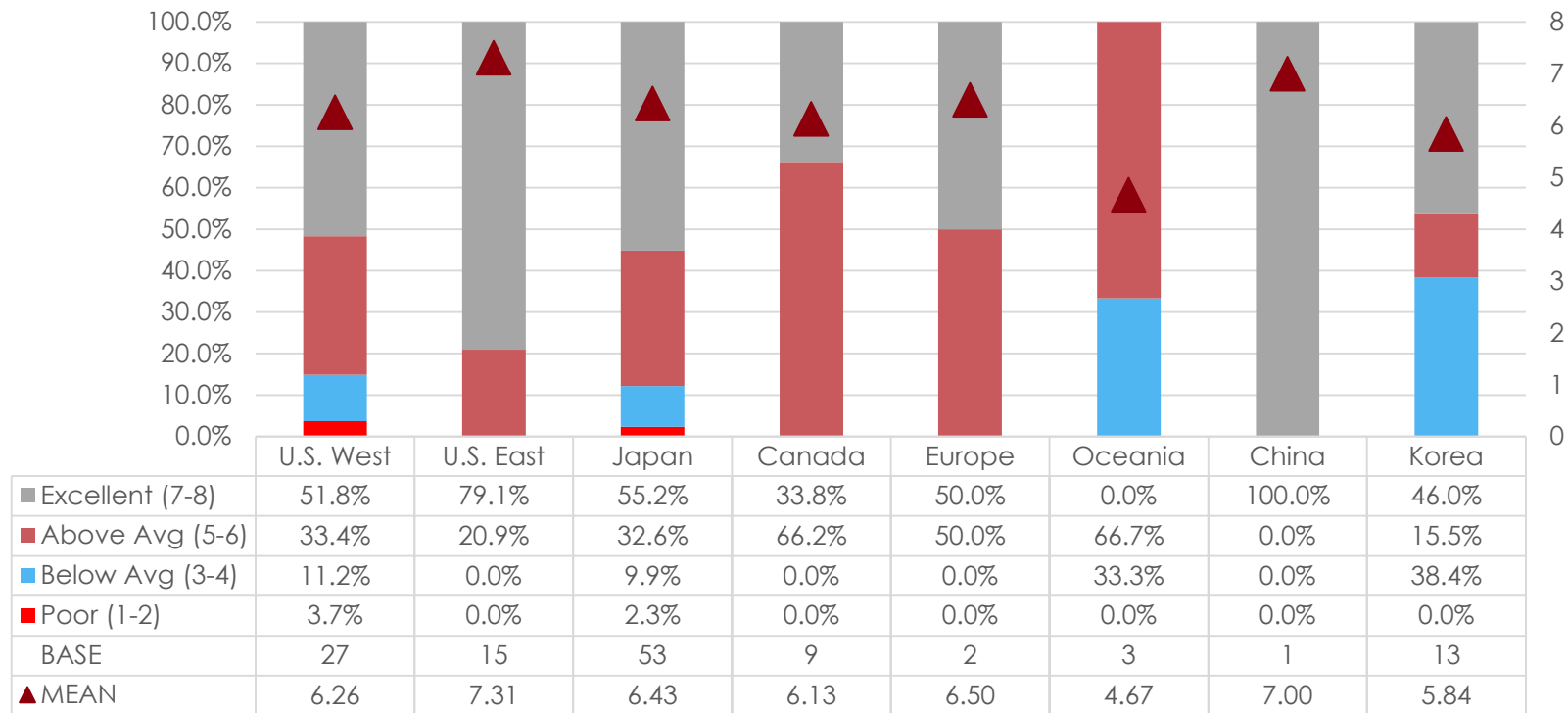
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Excellent (7-8)	70.4%	78.4%	53.7%	69.3%	36.4%	61.0%	100.0%	53.8%
Above Avg (5-6)	25.9%	12.8%	30.8%	22.8%	63.6%	39.0%	0.0%	7.8%
Below Avg (3-4)	0.0%	8.7%	15.5%	7.9%	0.0%	0.0%	0.0%	38.4%
Poor (1-2)	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	27	23	52	13	3	5	1	13
MEAN	6.92	7.22	6.40	6.77	6.09	6.61	7.00	5.84

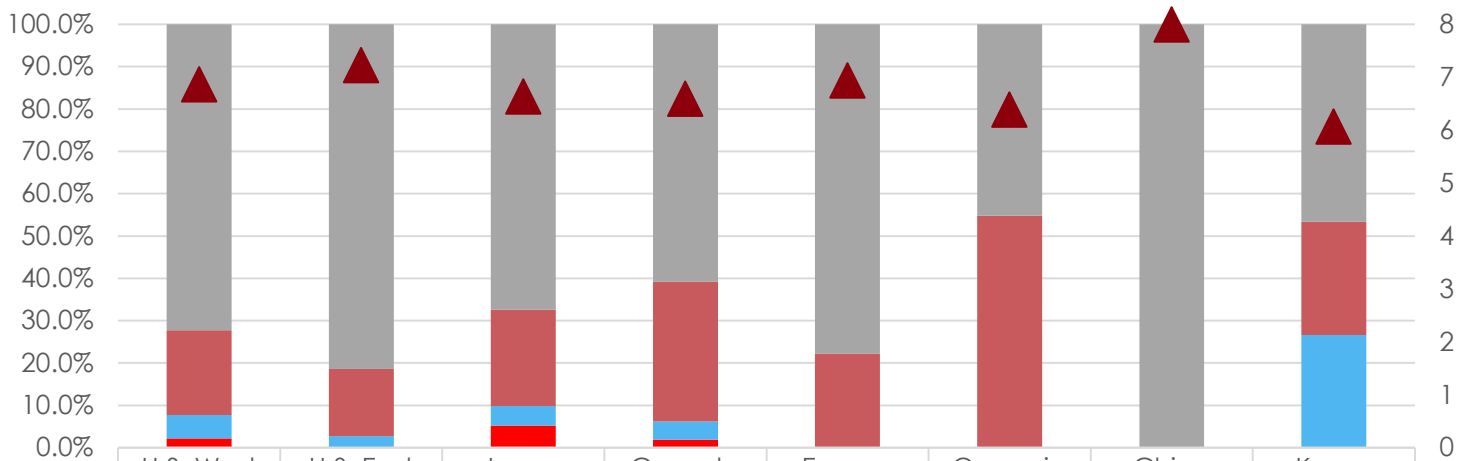
OVERALL ACCESSIBILITY – DEPT. OF AGRICULTURE ANIMAL QUARANTINE

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



OVERALL ACCESSIBILITY – HOTELS

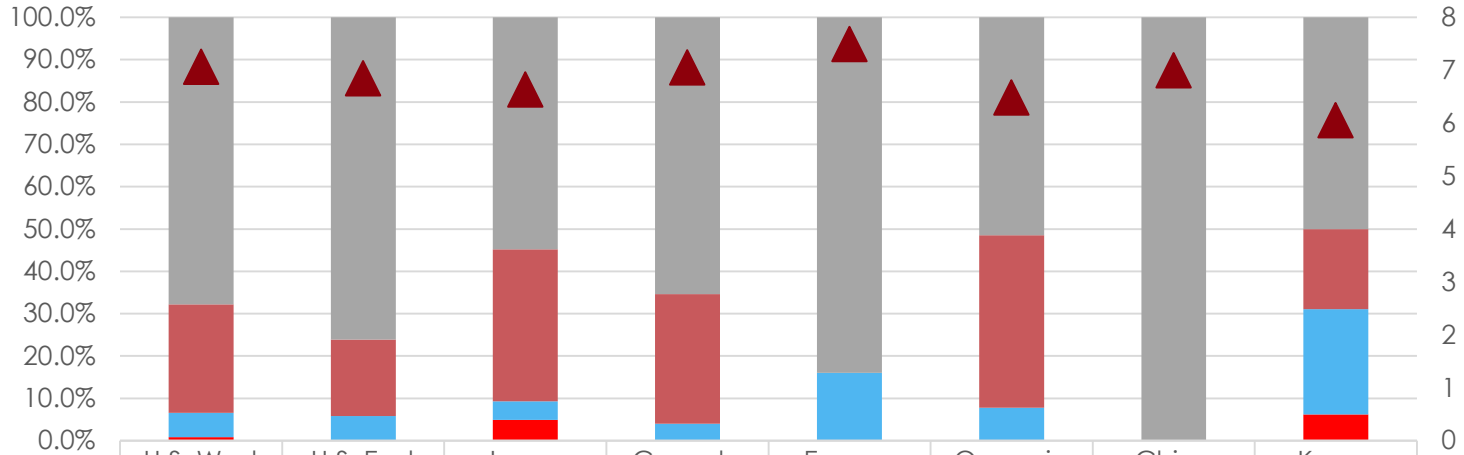
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	72.3%	81.4%	67.4%	60.9%	77.8%	45.2%	100.0%	46.6%
■ Above Avg (5-6)	20.0%	15.9%	22.8%	33.0%	22.2%	54.8%	0.0%	26.8%
■ Below Avg (3-4)	5.5%	2.7%	4.6%	4.3%	0.0%	0.0%	0.0%	26.6%
■ Poor (1-2)	2.2%	0.0%	5.2%	1.9%	0.0%	0.0%	0.0%	0.0%
BASE	90	69	70	48	5	8	1	15
▲ MEAN	6.87	7.23	6.64	6.60	6.94	6.39	8.00	6.07

OVERALL ACCESSIBILITY – RESTAURANTS

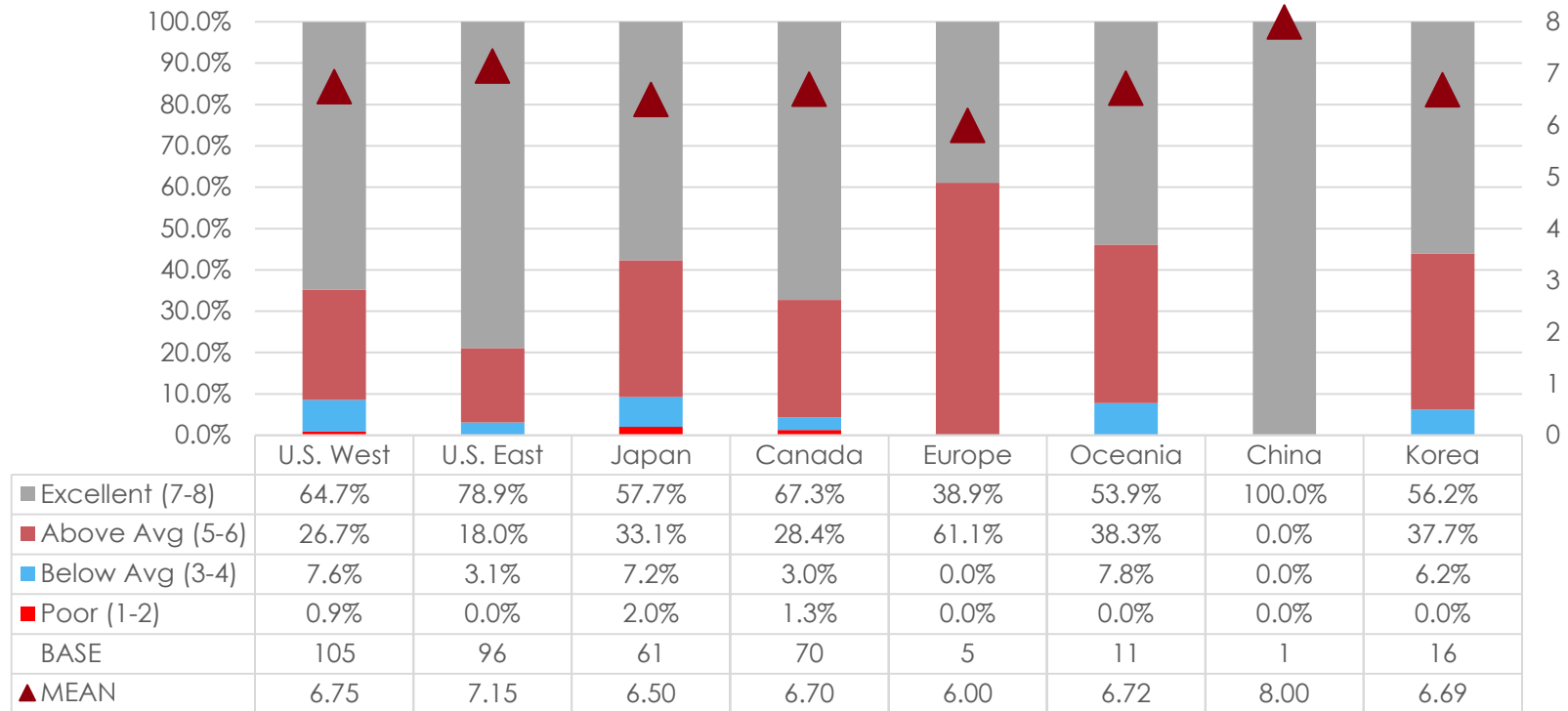
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	67.8%	76.1%	54.8%	65.5%	84.0%	51.5%	100.0%	50.0%
■ Above Avg (5-6)	25.6%	18.1%	35.9%	30.6%	0.0%	40.7%	0.0%	18.9%
■ Below Avg (3-4)	5.8%	5.8%	4.4%	4.0%	16.0%	7.8%	0.0%	24.9%
■ Poor (1-2)	0.8%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	6.2%
BASE	121	106	73	75	7	11	1	16
▲ MEAN	7.07	6.85	6.64	7.06	7.50	6.49	7.00	6.06

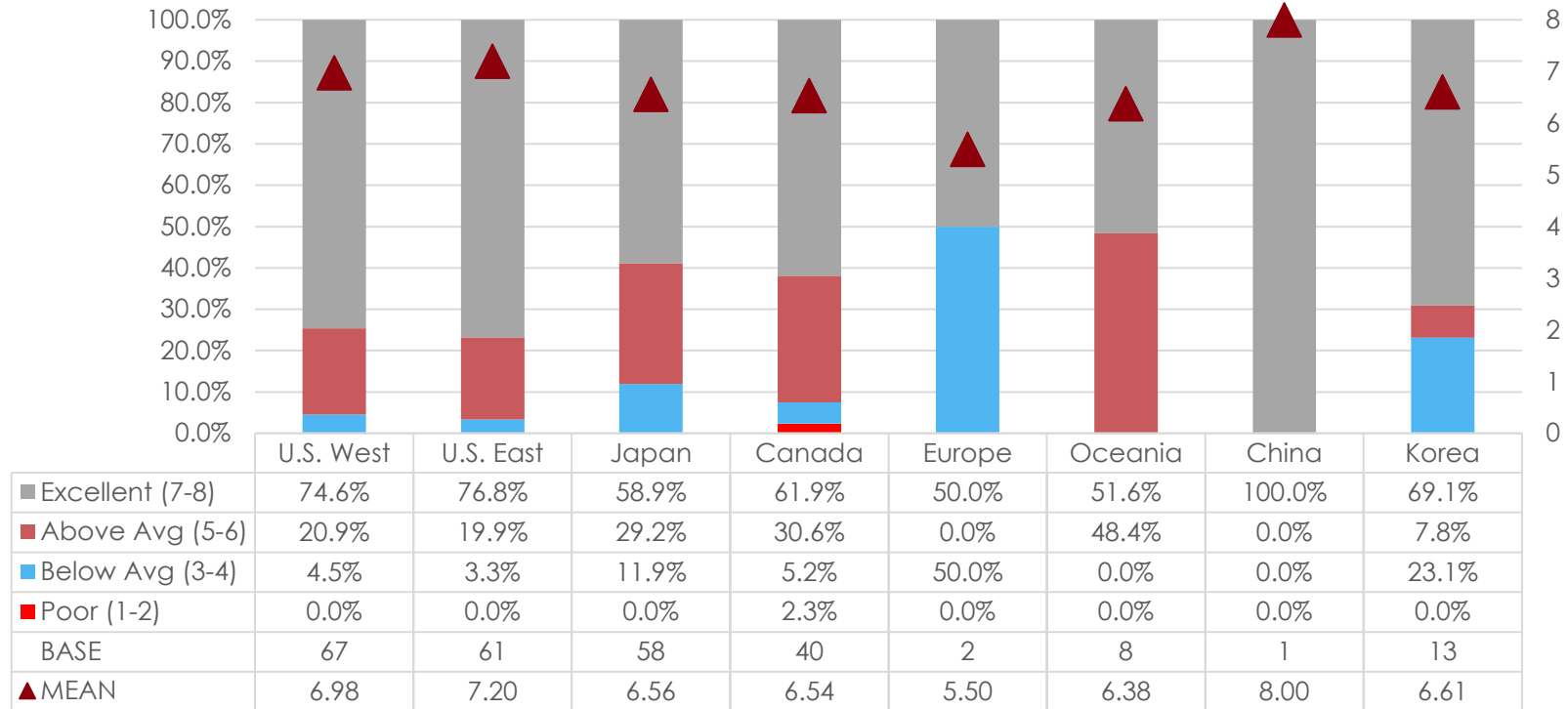
OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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



OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

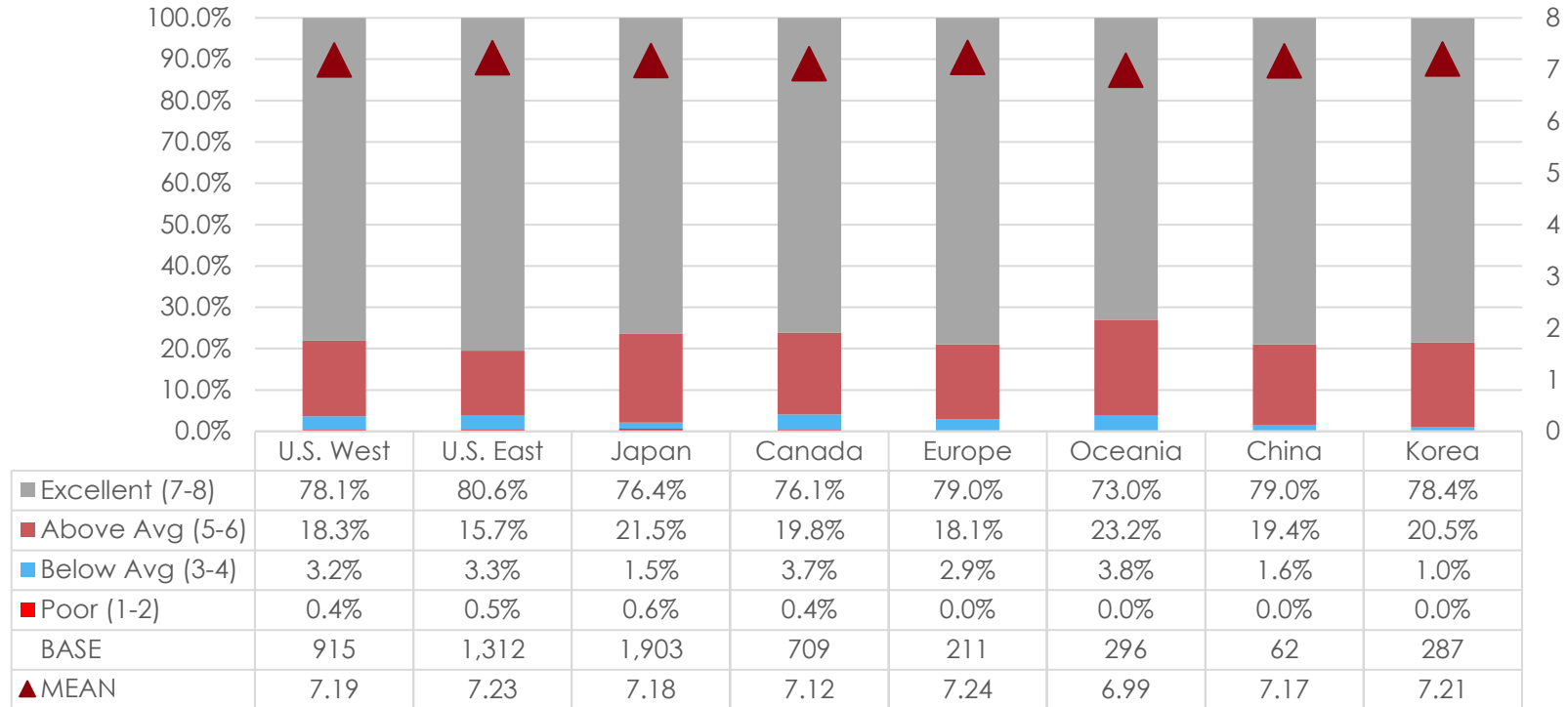
8-pt Rating Scale
8=Excellent / 1=Poor



SECTION – O'AHU

SATISFACTION – O‘AHU

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

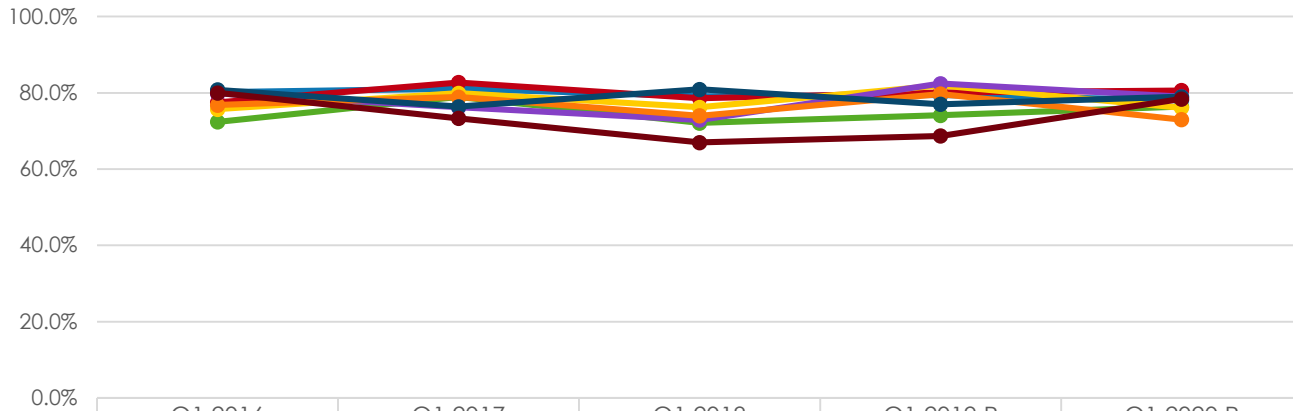


SATISFACTION – O‘AHU

- **Only visited O‘ahu:** Those from the following visitor markets who visited just O‘ahu during this trip tended to rate the island higher compared to those who also visited a Neighbor Island during their stay: U.S. West, U.S. East, and Japan.
- **First-time vs Repeat:** Visitors from U.S. West and Japan who were on their first trip to Hawai‘i rated O‘ahu higher than repeat visitors.
- **Travel agent:** Japanese visitors who used a travel agent gave a higher rating than those visitors from this market who did not use a travel agent.
- **Education:** Among visitors from U.S. West, those with a college degree were more satisfied with their stay on O‘ahu than those visitors without a degree from this visitor market.
- **Household income:** Less affluent visitors from Oceania in households with incomes below \$100K were more satisfied with their stay than those in households earning above this amount.

SATISFACTION – O‘AHU

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

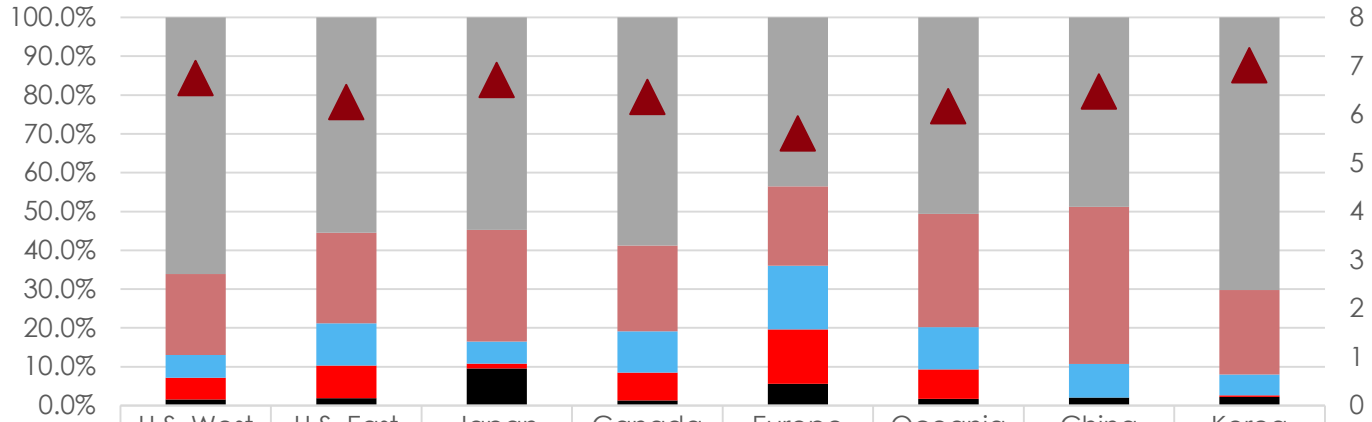


	Q1 2016	Q1 2017	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	80.2%	81.1%	79.1%	79.4%	78.1%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.6%
Japan	72.4%	78.9%	72.1%	74.1%	76.4%
Canada	75.7%	79.9%	76.2%	81.9%	76.1%
Europe	79.8%	76.2%	72.9%	82.4%	79.0%
Oceania	76.8%	78.9%	74.0%	79.7%	73.0%
China	80.8%	76.4%	80.9%	77.0%	79.0%
Korea	80.0%	73.3%	67.0%	68.7%	78.4%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

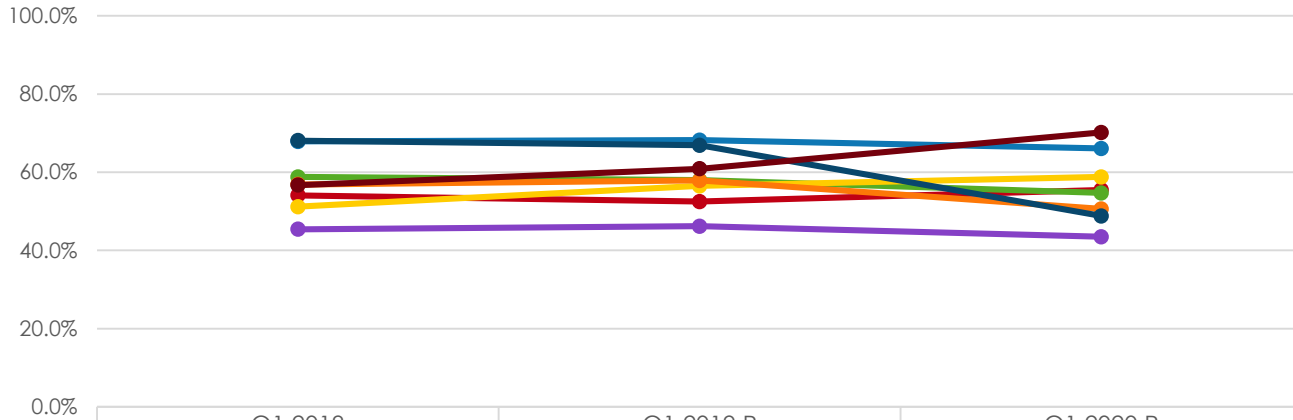
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	66.1%	55.5%	54.7%	58.8%	43.5%	50.6%	48.8%	70.2%
■ Somewhat likely (5-6)	20.9%	23.3%	28.8%	22.1%	20.5%	29.2%	40.5%	21.8%
■ Somewhat unlikely (3-4)	5.8%	10.9%	5.7%	10.6%	16.4%	10.9%	8.6%	5.4%
■ Very unlikely (1-2)	5.6%	8.4%	1.2%	7.2%	14.0%	7.6%	0.0%	0.4%
■ Not sure	1.6%	1.9%	9.6%	1.3%	5.6%	1.7%	2.1%	2.2%
BASE	805	980	1,813	603	154	265	47	225
▲ MEAN	6.75	6.25	6.71	6.36	5.61	6.17	6.47	7.01

LIKELIHOOD OF RETURN VISIT – O‘AHU

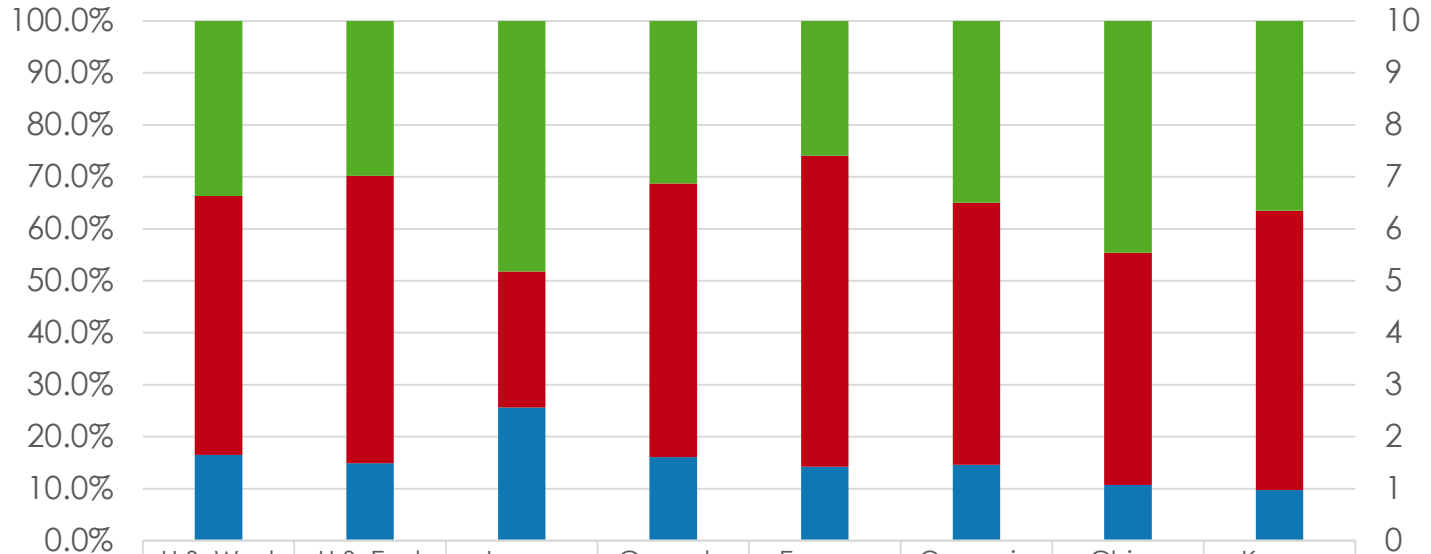
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	67.9%	68.2%	66.1%
U.S. East	54.1%	52.5%	55.5%
Japan	58.8%	58.0%	54.7%
Canada	51.2%	56.5%	58.8%
Europe	45.4%	46.2%	43.5%
Oceania	56.9%	57.9%	50.6%
China	68.1%	66.9%	48.8%
Korea	56.7%	60.9%	70.2%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Aided Ad Awareness	33.7%	29.8%	48.2%	31.3%	25.9%	35.0%	44.6%	36.5%
■ No Prior Awareness	49.8%	55.3%	26.2%	52.6%	59.9%	50.4%	44.7%	53.8%
■ Unsure	16.5%	14.9%	25.6%	16.1%	14.2%	14.6%	10.7%	9.7%
BASE	807	983	1,820	606	156	265	47	227

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Atlantis Submarine & Cruises	3.0%	4.7%	6.4%	2.3%	5.4%	3.9%	14.9%	3.1%
Bernice P. Bishop Museum	4.0%	4.3%	2.6%	4.0%	5.0%	2.9%	4.3%	1.8%
Byodo-In Temple	7.5%	7.8%	1.2%	8.3%	11.3%	7.0%	2.1%	1.3%
Chinatown & Honolulu Art District	13.7%	12.2%	10.3%	12.9%	14.6%	10.3%	21.3%	4.9%
Diamond Head State Monument	28.6%	38.8%	24.1%	41.9%	48.0%	38.0%	27.7%	51.8%
Dole Plantation	31.4%	38.0%	11.3%	34.9%	29.9%	32.5%	25.6%	46.1%
Haleiwa	26.6%	22.5%	23.5%	26.3%	24.3%	11.9%	2.1%	13.4%
Hanauma Bay Nature Reserve	19.5%	19.9%	14.0%	31.4%	21.4%	19.9%	42.6%	30.9%
Harold L. Lyon Arboretum	1.1%	1.8%	0.9%	1.0%	1.8%	1.1%	4.3%	1.3%
Hawai'i State Art Museum or Honolulu Museum of Art	3.0%	2.9%	3.2%	3.8%	4.9%	2.1%	4.3%	2.7%
Hawaiian Mission Houses, Historic Site and Archive	1.4%	2.2%	0.4%	2.7%	4.1%	1.1%	2.1%	2.2%
Hawai'i's Plantation Village	1.5%	2.9%	0.8%	1.6%	4.0%	0.8%	4.2%	1.8%
Honolulu Zoo	6.8%	5.1%	6.0%	11.0%	10.8%	10.1%	6.4%	7.6%

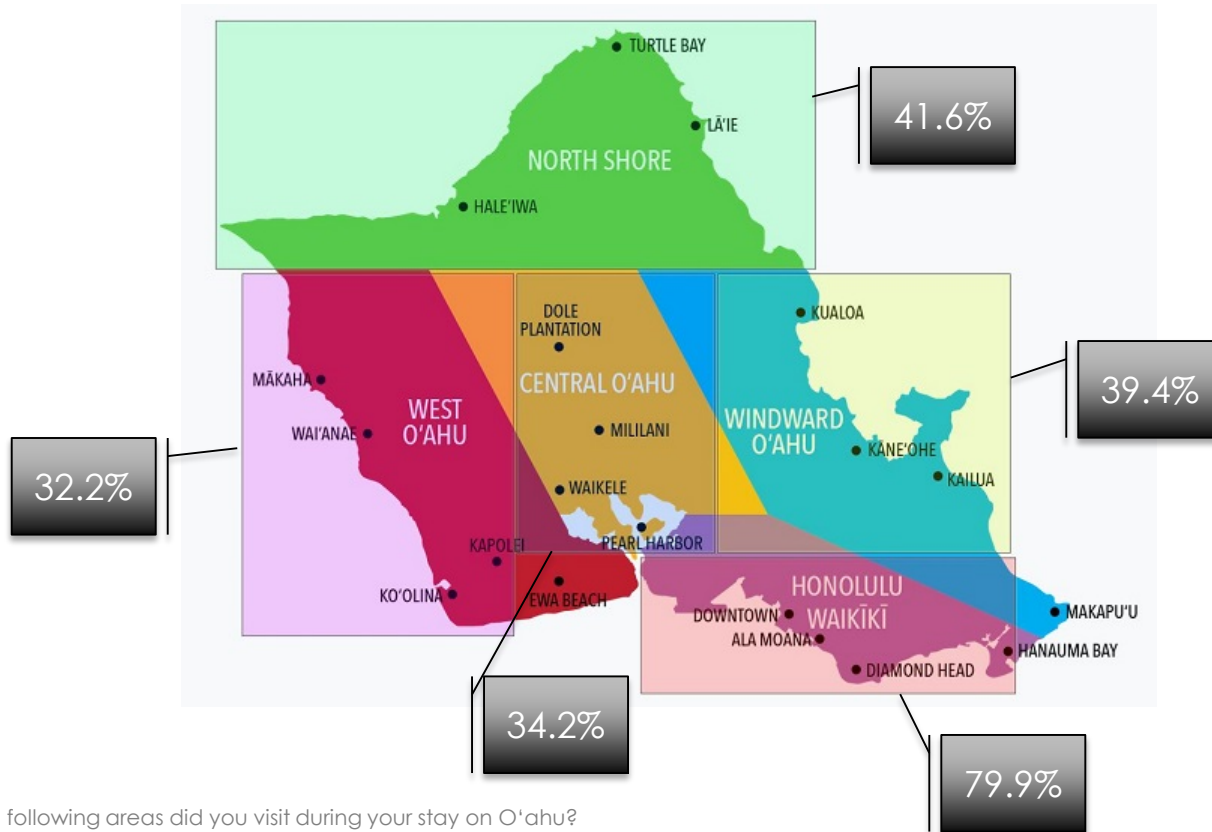
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Ho‘omaluhia Botanical Garden	6.1%	5.9%	0.3%	3.7%	6.5%	3.8%	0.0%	1.8%
Iolani Palace State Monument	5.8%	7.8%	7.8%	7.0%	13.1%	6.5%	17.1%	12.1%
Kaiwi State Scenic Shoreline/ Makapuu Trail	5.7%	10.0%	3.3%	8.8%	8.5%	1.7%	2.1%	0.9%
Kakaako Street Art	2.6%	1.5%	17.1%	2.8%	3.4%	1.8%	0.0%	5.8%
Koko Head Crater Trail	6.5%	7.6%	2.8%	9.9%	12.6%	4.2%	2.1%	3.1%
Kualoa Private Nature Reserve	9.4%	9.7%	8.6%	10.7%	9.5%	12.8%	27.7%	17.5%
Lanikai or Kailua Beach	27.6%	29.6%	23.9%	35.8%	30.4%	19.5%	6.4%	31.7%
Manoa Falls & Trail	8.3%	10.8%	1.8%	13.1%	12.8%	6.7%	6.3%	3.6%
National Memorial Cemetery of the Pacific	9.6%	17.1%	1.2%	8.2%	14.7%	9.4%	6.4%	5.8%
Nuuanu Pali Lookout	10.9%	18.0%	2.4%	16.3%	17.3%	9.9%	19.1%	11.1%
North Shore Beaches	51.4%	55.0%	16.7%	57.6%	51.1%	44.2%	27.6%	37.5%

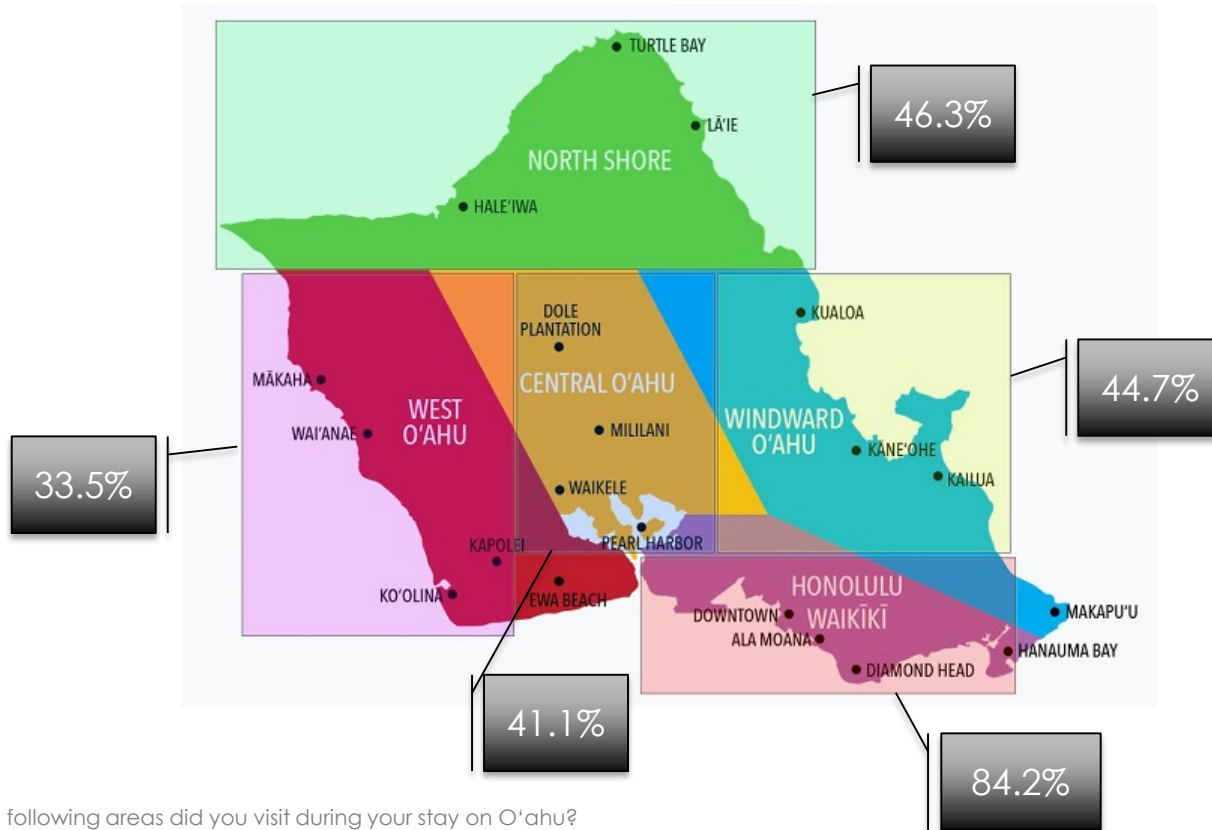
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pearl Harbor	37.4%	53.6%	5.7%	35.7%	63.5%	42.6%	59.7%	13.4%
Polynesian Cultural Center	16.8%	17.5%	3.2%	18.4%	18.5%	14.0%	14.9%	24.5%
Queen Emma’s Summer Palace	2.6%	2.9%	0.4%	2.5%	2.7%	2.3%	2.1%	1.8%
Sea Life Park Hawai‘i	3.7%	3.6%	1.9%	5.1%	2.0%	2.3%	10.6%	1.8%
Waikiki Aquarium	4.8%	4.9%	4.4%	11.7%	5.4%	7.5%	4.3%	5.3%
Waimanalo Beach Park	10.0%	11.6%	2.9%	17.9%	17.1%	6.6%	0.0%	9.8%
Waimea Valley	18.6%	20.5%	1.5%	18.5%	17.6%	12.5%	2.1%	3.1%

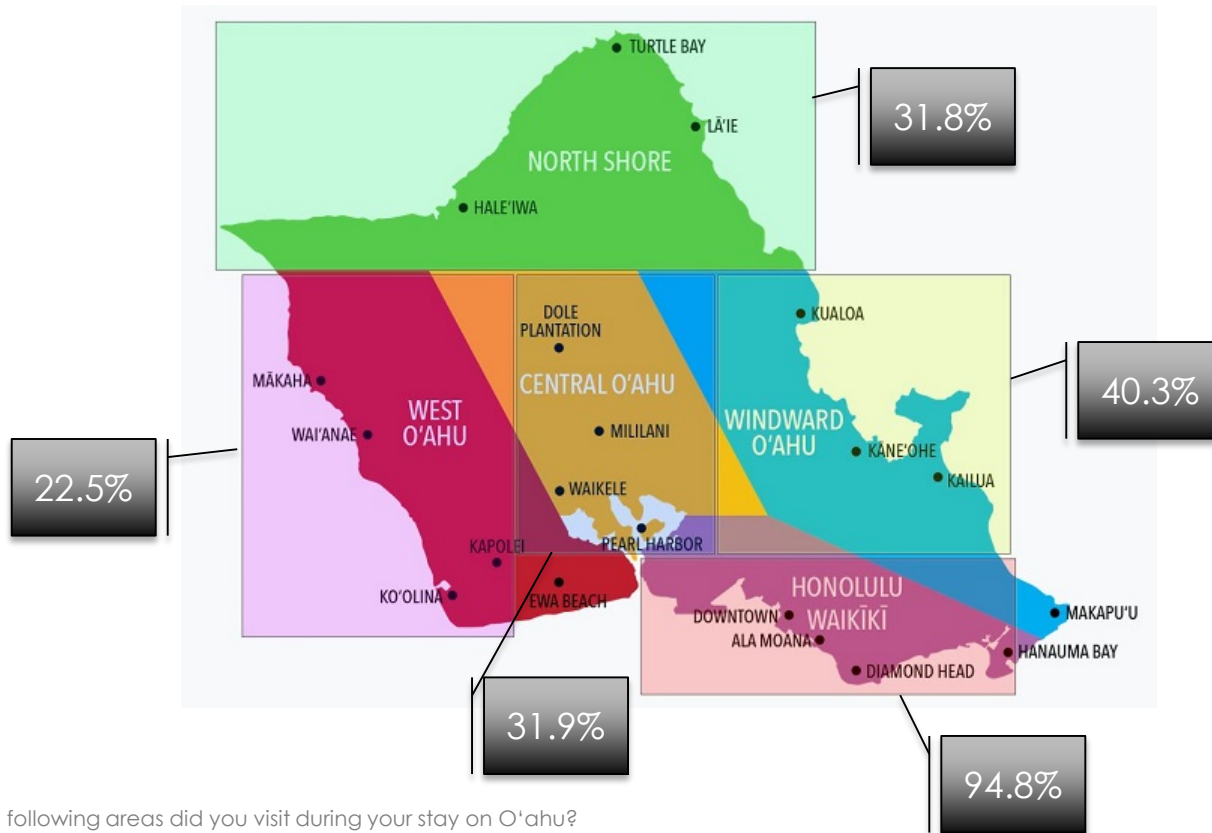
AREAS VISITED U.S. WEST



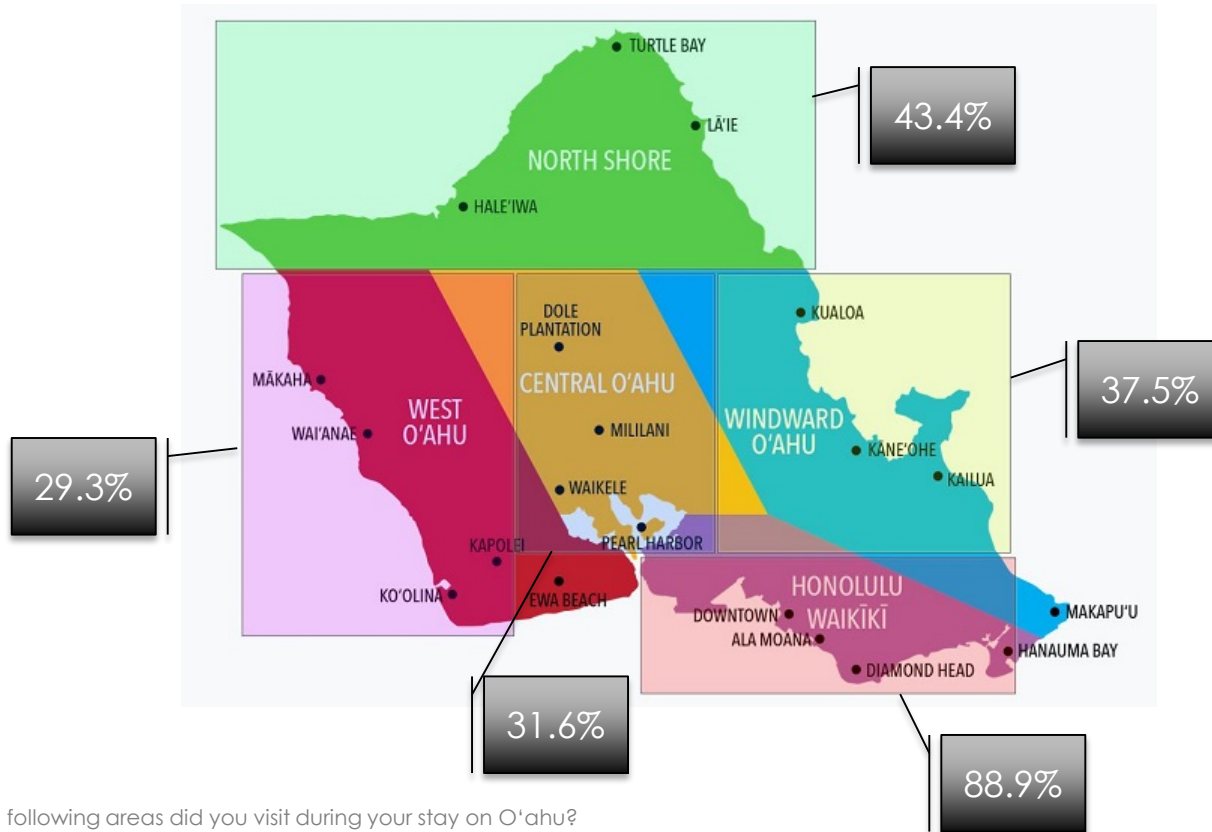
AREAS VISITED U.S. EAST



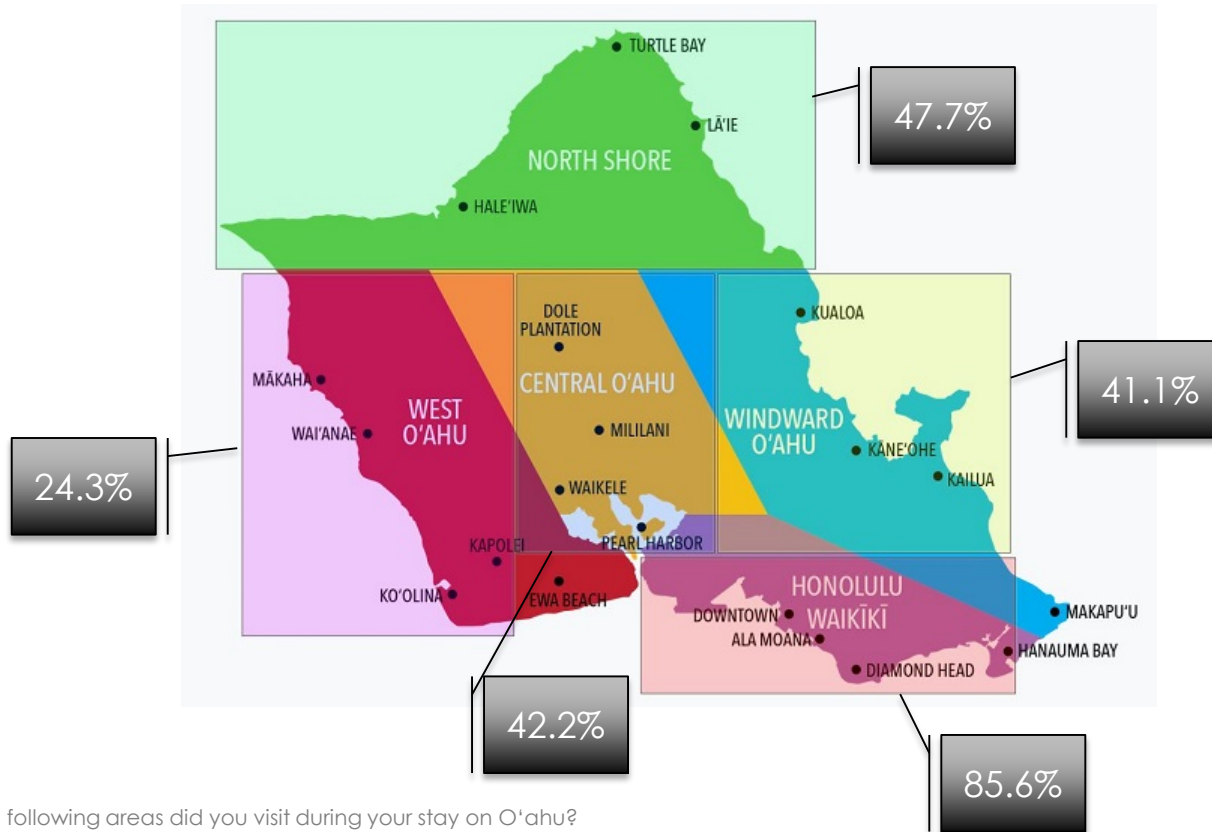
AREAS VISITED JAPAN



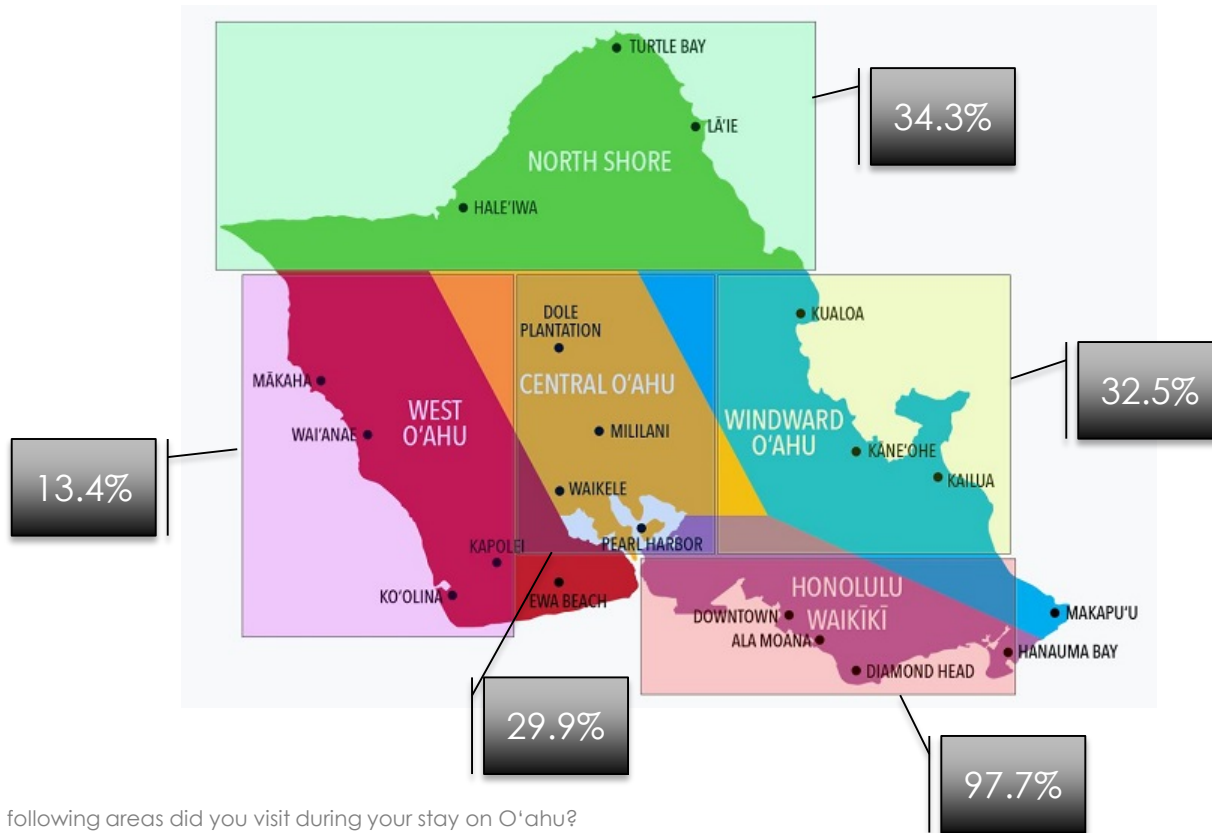
AREAS VISITED CANADA



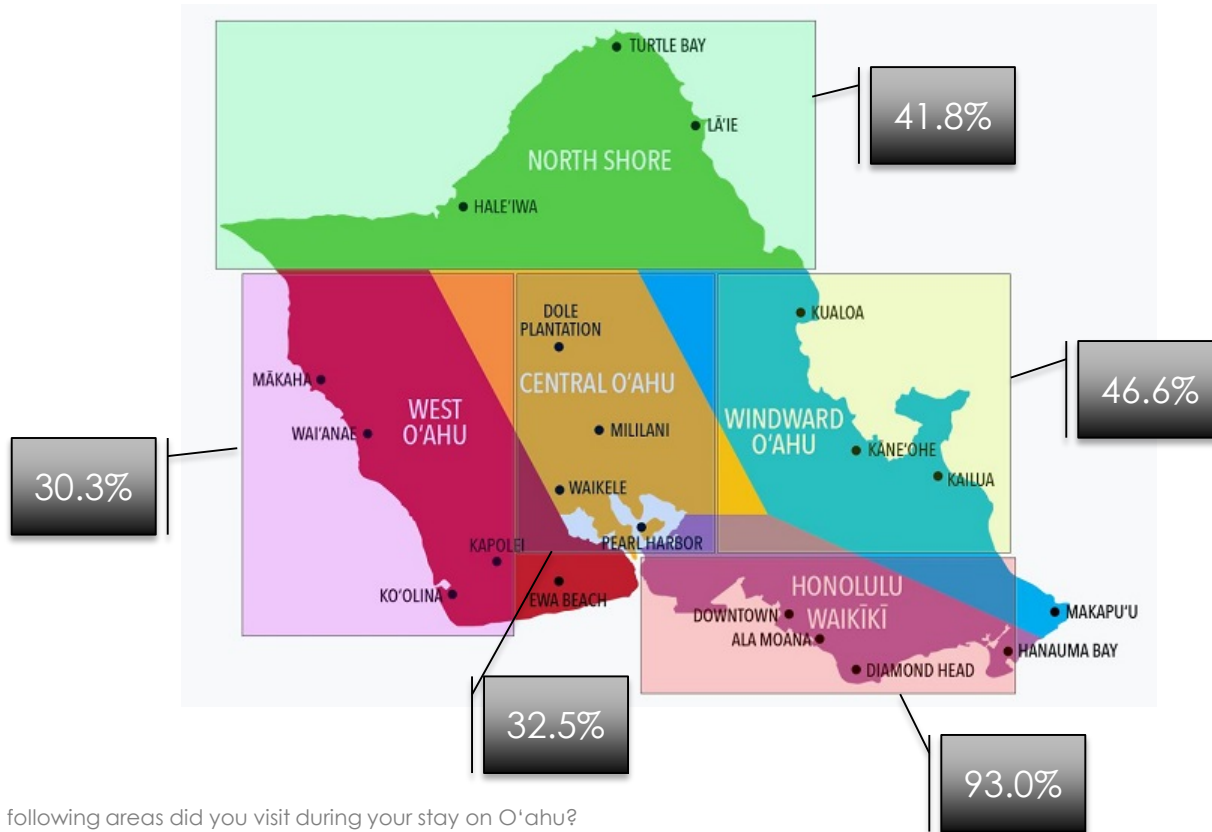
AREAS VISITED EUROPE



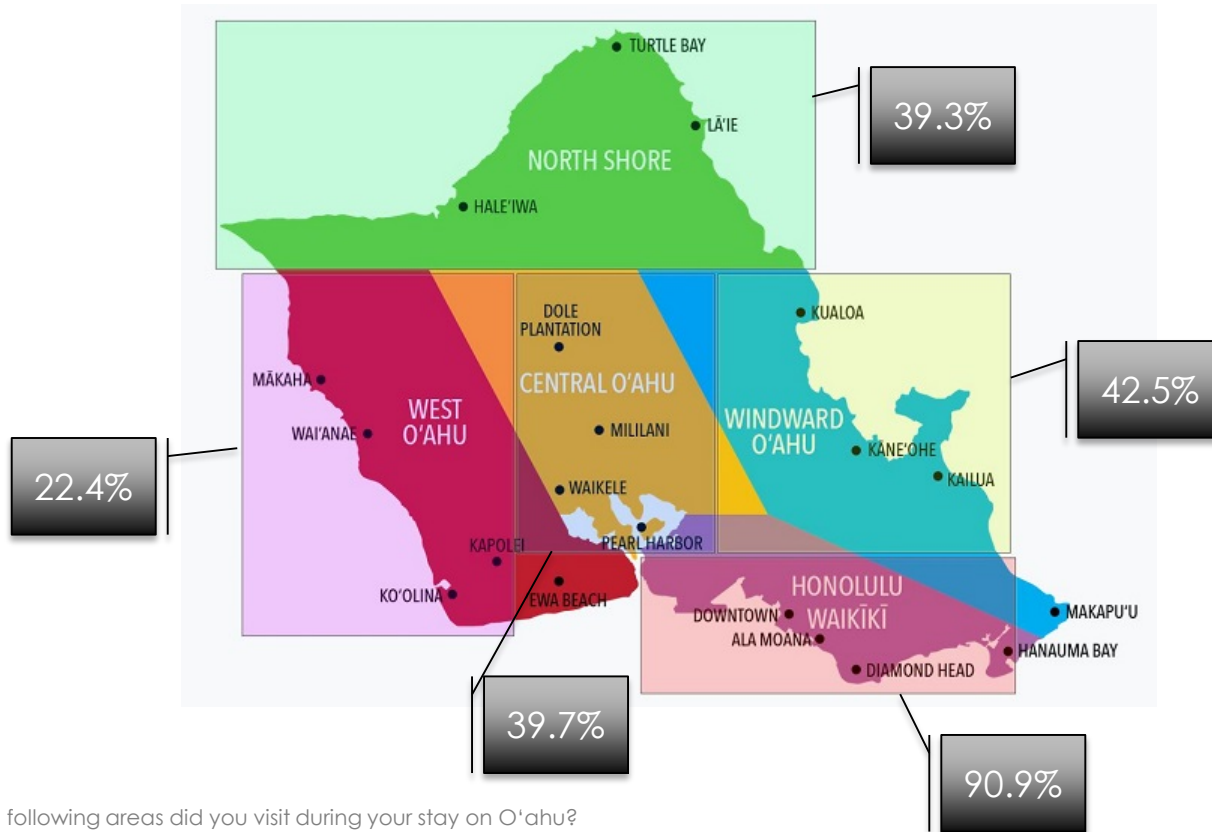
AREAS VISITED OCEANIA



AREAS VISITED CHINA

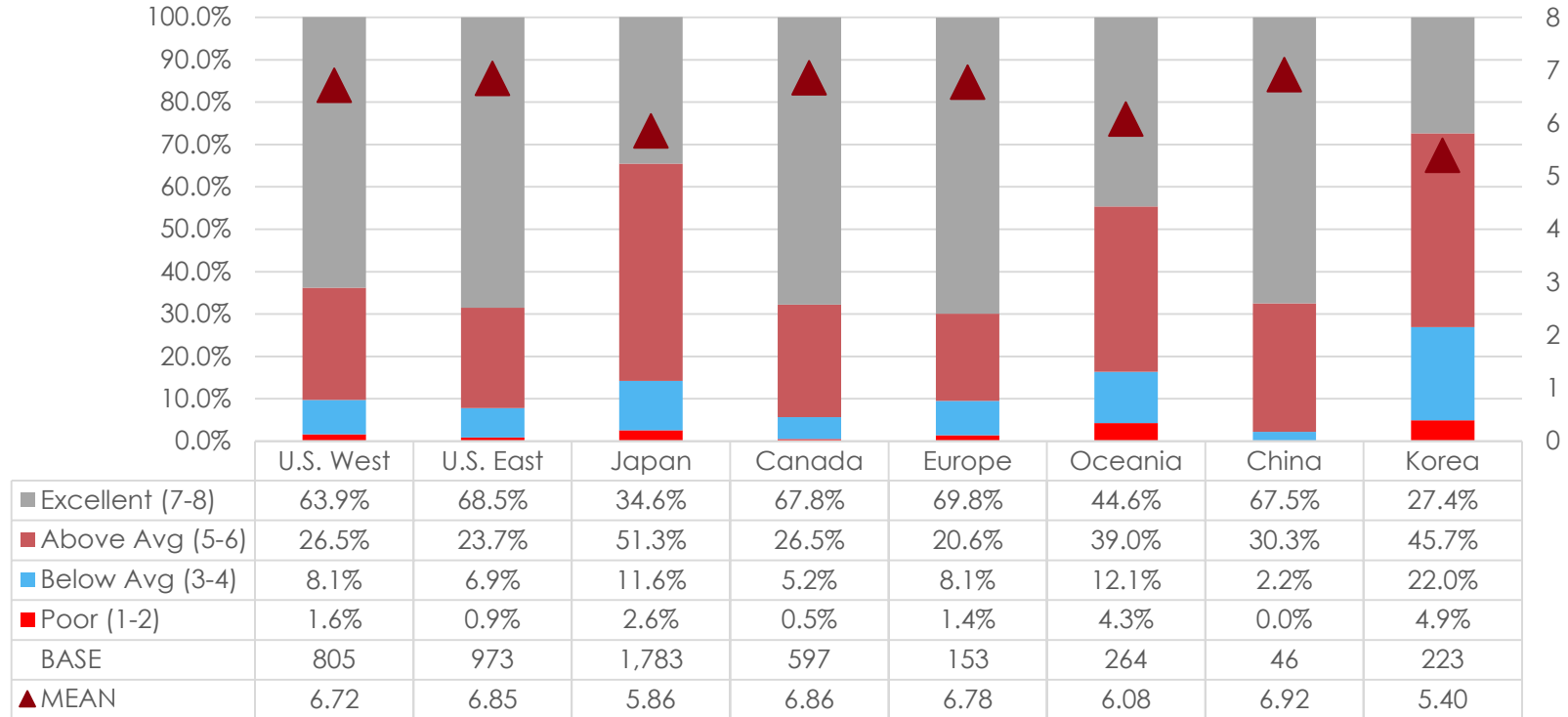


AREAS VISITED KOREA



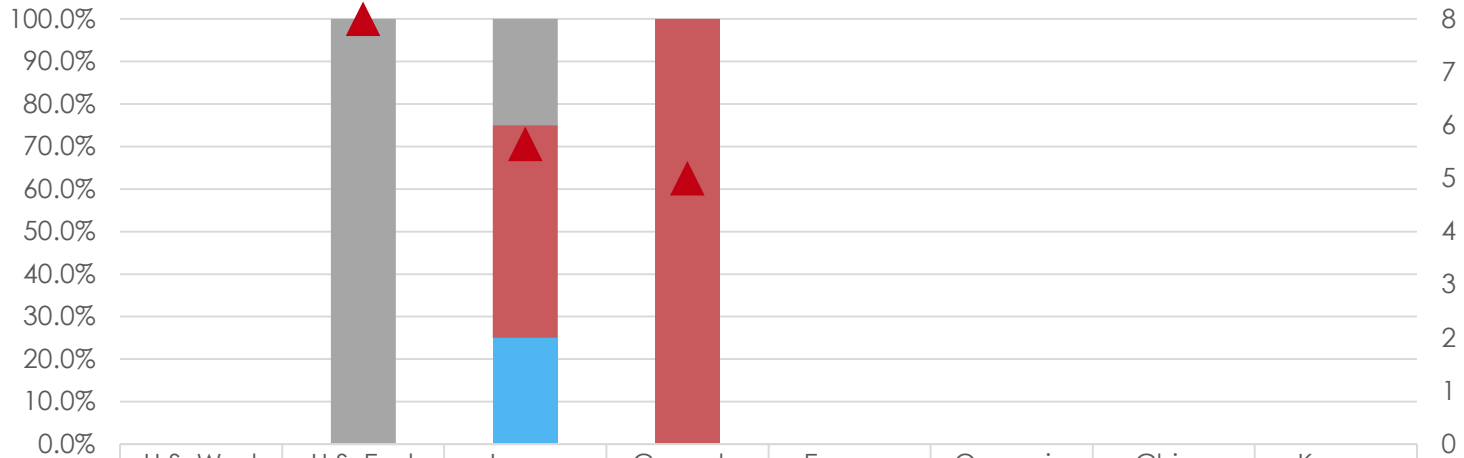
SATISFACTION – Daniel K. Inouye International Airport

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



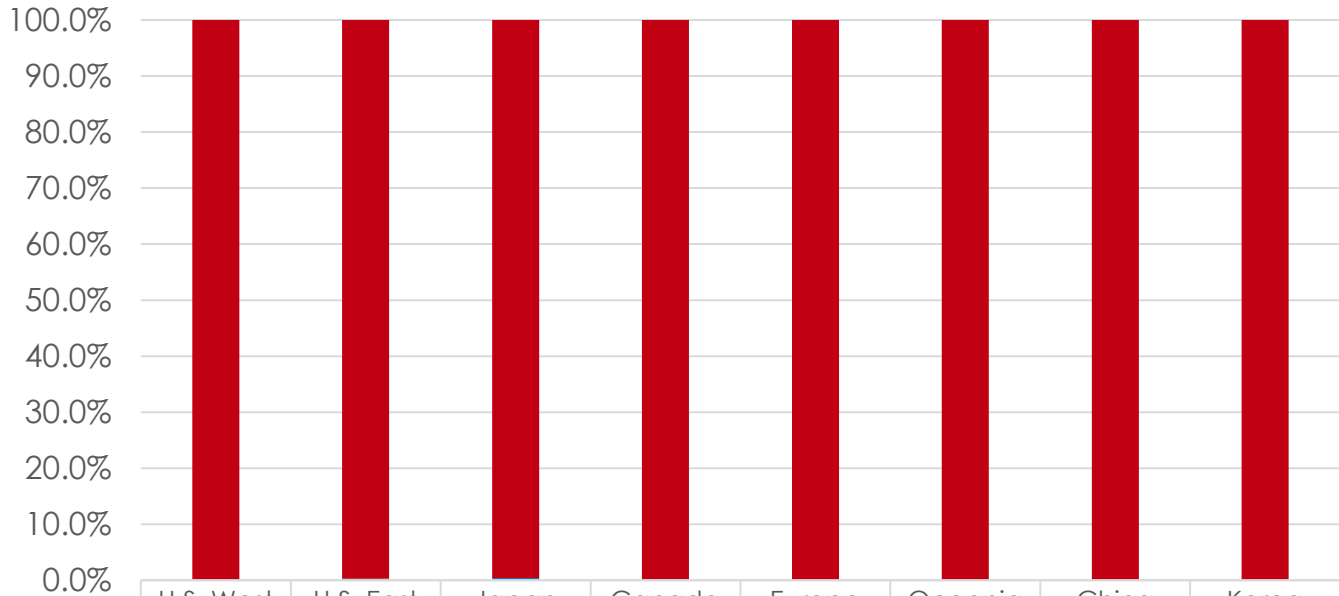
SATISFACTION – Honolulu Harbor

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



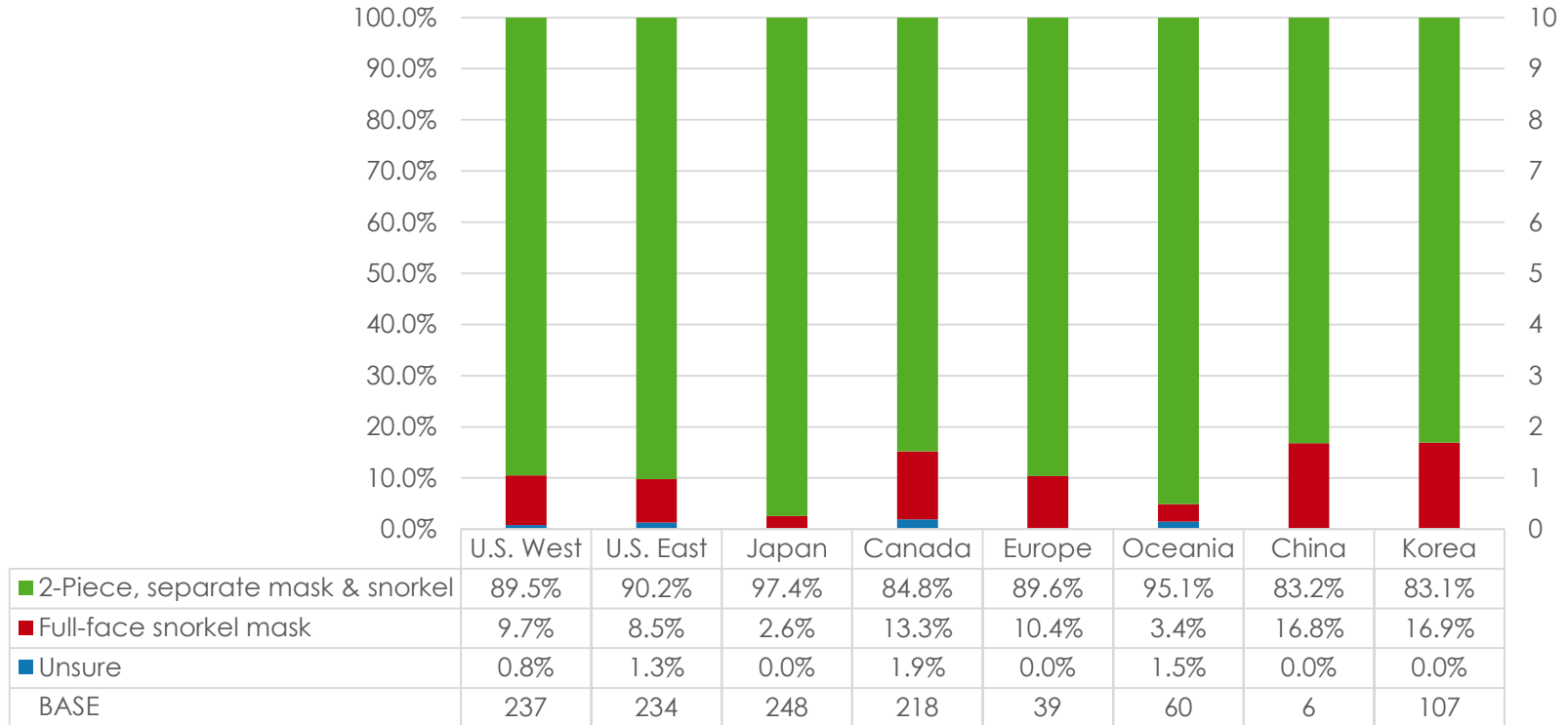
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	0.0%	100.0%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%
■ Above Avg (5-6)	0.0%	0.0%	50.0%	100.0%	0.0%	0.0%	0.0%	0.0%
■ Below Avg (3-4)	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%
■ Poor (1-2)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	0	3	8	1	0	0	0	0
▲ MEAN		8.00	5.65	5.00				

TRANSPAC TRAVEL OPTIONS – O‘AHU



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Air/ Flight	100.0%	99.7%	99.6%	99.8%	100.0%	100.0%	100.0%	100.0%
■ Cruise Ship/ Ocean Vessel	0.0%	0.3%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%
BASE	805	977	1,791	599	153	264	46	224

SNORKELING EQUIPMENT USED – O‘AHU



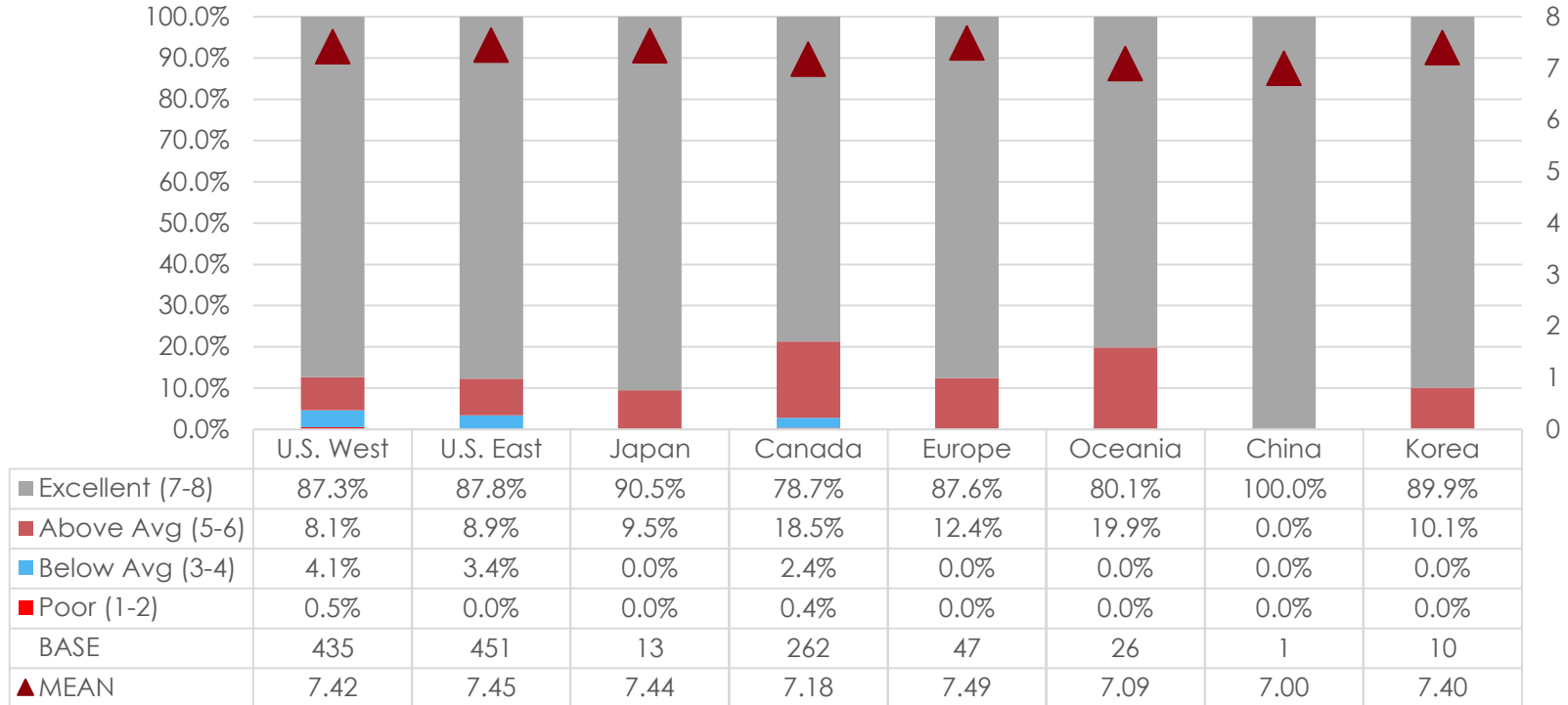
SNORKELING OCEAN SAFETY – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Did not have to be assisted or rescued	98.3%	97.5%	97.9%	96.9%	100.0%	100.0%	100.0%	99.1%
Yes, needed assistance – using 2-piece mask & snorkel	1.3%	1.7%	1.6%	2.2%	0.0%	0.0%	0.0%	0.9%
Yes, needed assistance – using full-face mask	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – other ocean activity	0.0%	0.4%	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%
BASE	237	234	248	218	39	60	6	107

SECTION – KAUA‘I

SATISFACTION – KAUA‘I

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

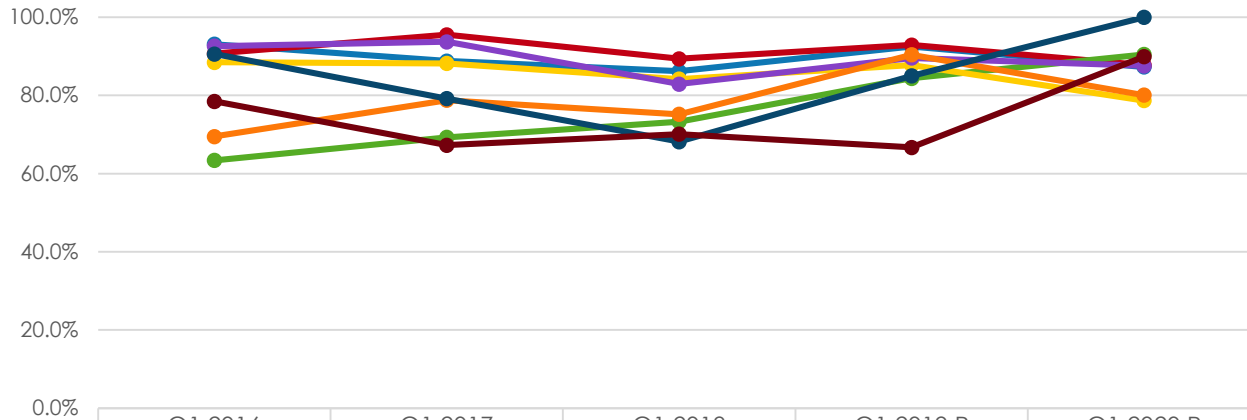


SATISFACTION – KAUA‘I

- **Gender:** Female travelers from U.S. West were more satisfied with their stay on Kaua‘i than male travelers from this visitor market.
- **Household Income:** Less affluent visitors from Canada or those with household income below \$100K were more likely to give a top box (excellent) score than more affluent visitors from this market.
- **Islands Visited:** Visitors from U.S. East whose most recent trip included visiting only Kaua‘i were more likely to provide a top box (excellent) score than were visitors from this market whose trip included stops on another Hawaiian Island.
- **Travel Agent:** Visitors from U.S. West who used a travel agent gave top box (excellent) ratings in higher numbers than those who did not consult with a travel agent from this market.

SATISFACTION – KAUA‘I

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

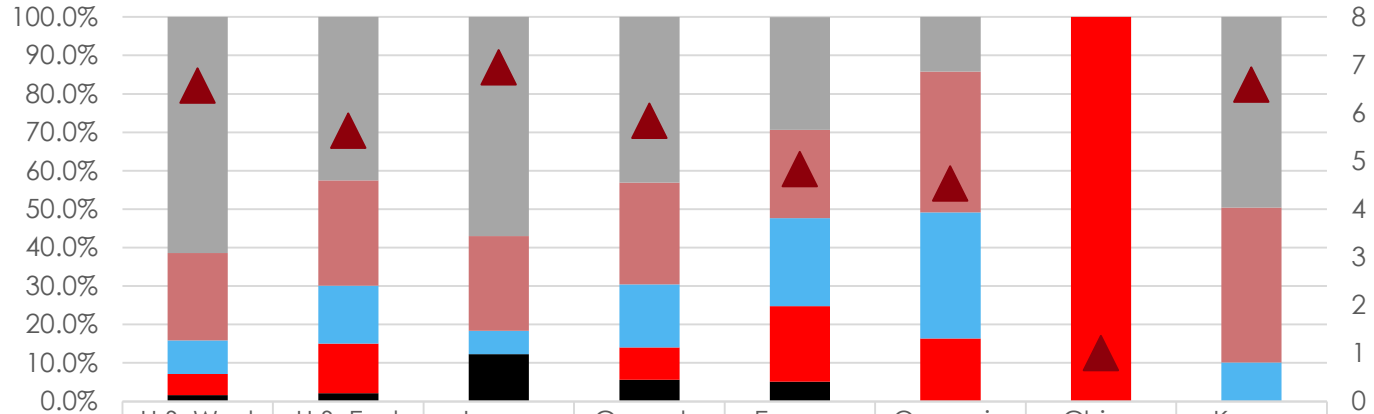


	Q1 2016	Q1 2017	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	93.1%	88.8%	86.2%	92.5%	87.3%
U.S. East	90.7%	95.5%	89.4%	92.9%	87.8%
Japan	63.4%	69.3%	73.3%	84.4%	90.5%
Canada	88.5%	88.2%	84.2%	87.8%	78.7%
Europe	92.6%	93.7%	82.9%	89.6%	87.6%
Oceania	69.5%	78.8%	75.2%	90.4%	80.1%
China	90.6%	79.2%	68.2%	85.0%	100.0%
Korea	78.5%	67.3%	70.1%	66.7%	89.9%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – KAUA‘I

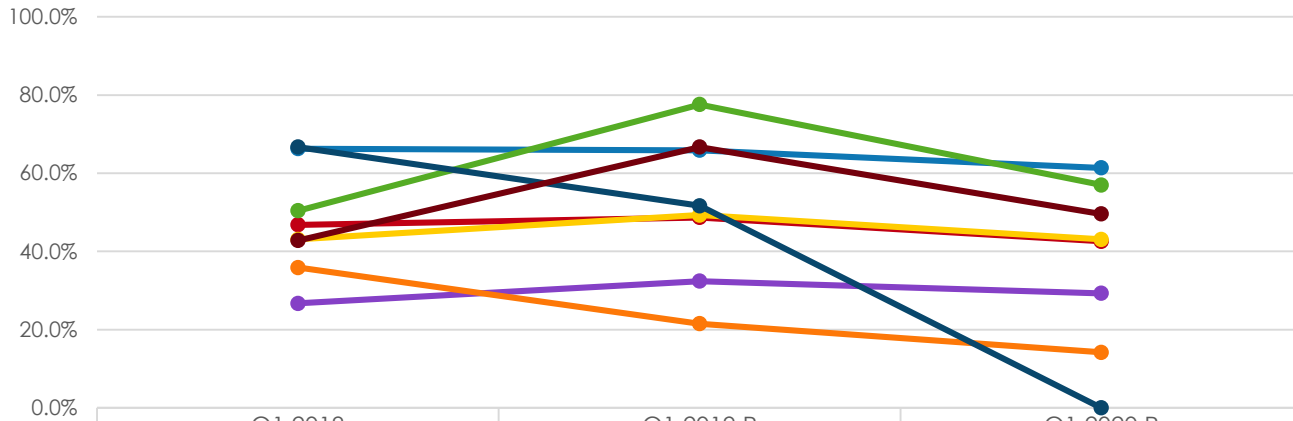
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	61.4%	42.6%	57.0%	43.1%	29.3%	14.2%	0.0%	49.6%
■ Somewhat likely (5-6)	22.7%	27.4%	24.6%	26.5%	22.9%	36.6%	0.0%	40.3%
■ Somewhat unlikely (3-4)	8.8%	15.1%	6.1%	16.4%	22.9%	32.8%	0.0%	10.1%
■ Very unlikely (1-2)	5.5%	12.9%	0.0%	8.4%	19.7%	16.4%	100.0%	0.0%
■ Not sure	1.6%	2.1%	12.3%	5.6%	5.1%	0.0%	0.0%	0.0%
BASE	432	424	13	260	44	26	1	10
▲ MEAN	6.57	5.63	6.95	5.84	4.83	4.53	1.00	6.59

LIKELIHOOD OF RETURN VISIT – KAUA'I

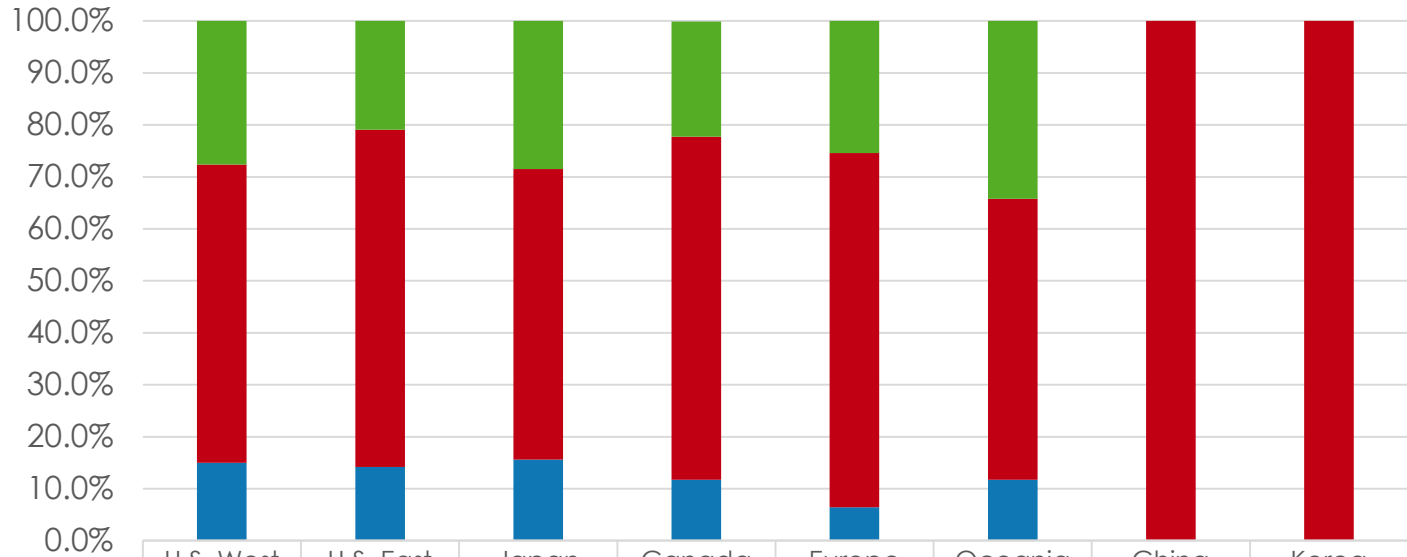
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	66.3%	65.9%	61.4%
U.S. East	46.8%	48.7%	42.6%
Japan	50.4%	77.6%	57.0%
Canada	43.1%	49.3%	43.1%
Europe	26.7%	32.4%	29.3%
Oceania	35.9%	21.5%	14.2%
China	66.7%	51.7%	0.0%
Korea	42.8%	66.7%	49.6%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	27.6%	20.9%	28.5%	22.2%	25.5%	34.2%	0.0%	0.0%
No Prior Awareness	57.4%	64.9%	55.9%	66.0%	68.2%	54.1%	100.0%	100.0%
Unsure	15.0%	14.2%	15.6%	11.7%	6.4%	11.7%	0.0%	0.0%
BASE	432	424	13	260	44	26	1	10

ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Fern Grotto	12.7%	16.0%	12.3%	14.6%	9.6%	18.9%	100.0%	0.0%
Hanalei Town	54.9%	42.1%	19.0%	58.9%	41.4%	45.9%	0.0%	0.0%
Hanalei Beach	50.2%	37.4%	9.5%	58.3%	52.2%	49.5%	0.0%	0.0%
Kalalau Trail	11.6%	12.3%	0.0%	24.7%	15.9%	8.2%	0.0%	19.9%
Kalapaki Beach	26.6%	22.1%	0.0%	32.9%	26.8%	23.5%	0.0%	29.7%
Bike Path in Kapaa	9.0%	4.8%	0.0%	13.7%	10.8%	0.0%	0.0%	0.0%
Kaua‘i Museum	6.5%	3.3%	9.5%	4.3%	4.5%	0.0%	0.0%	0.0%
Ke‘e Beach	13.4%	7.9%	6.1%	20.6%	8.9%	4.6%	0.0%	0.0%
Kilauea Lighthouse	39.8%	31.9%	9.5%	39.4%	24.8%	30.6%	0.0%	9.8%
Koke‘e	11.8%	7.4%	0.0%	14.2%	13.4%	11.7%	0.0%	0.0%

ATTRACTIONS – KAUA‘I (cont.)

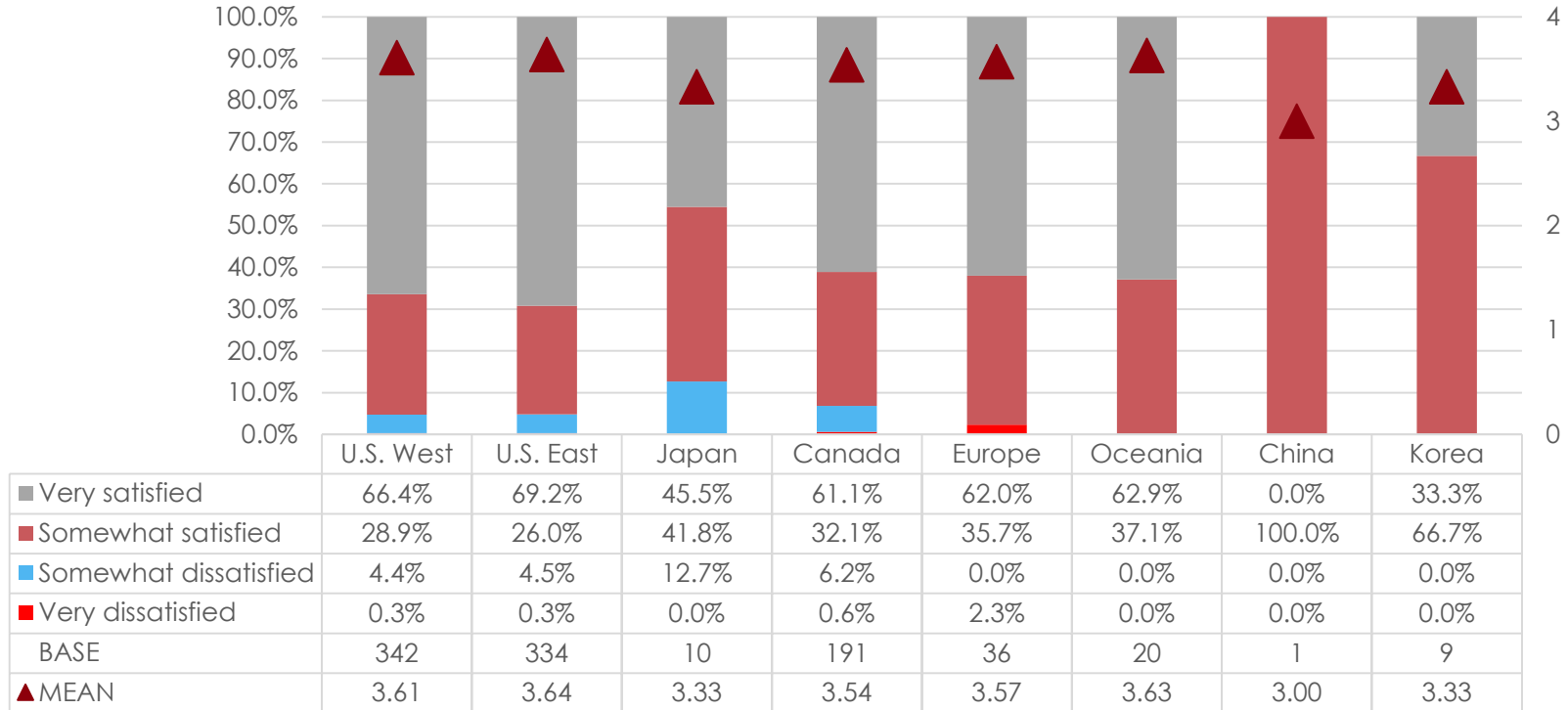
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Koke'e Museum	4.4%	2.2%	0.0%	5.1%	6.4%	0.0%	0.0%	0.0%
Na Aina Kai Gardens	3.5%	2.5%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%
Napali Coast	38.1%	47.2%	6.1%	47.0%	57.3%	49.5%	0.0%	40.3%
Allerton Garden	16.2%	8.8%	6.1%	8.3%	7.0%	0.0%	0.0%	10.1%
Limahuli Garden	8.6%	6.2%	0.0%	6.2%	3.8%	3.6%	0.0%	0.0%
Old Koloa Town	43.6%	27.9%	28.5%	37.1%	15.3%	23.5%	100.0%	0.0%
Opaeka'a Falls	28.5%	26.5%	0.0%	34.1%	41.4%	31.7%	100.0%	19.7%
Po'ipu Beach	65.0%	48.3%	44.1%	70.3%	43.3%	41.3%	0.0%	40.0%
Smith's Tropical Paradise Gardens	6.9%	7.3%	0.0%	5.6%	6.4%	3.6%	0.0%	0.0%
Spouting Horn	42.2%	34.5%	0.0%	42.8%	24.8%	25.6%	100.0%	19.9%
Wailua Falls	44.6%	44.7%	9.5%	48.3%	54.8%	43.4%	100.0%	70.0%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wailua River	25.7%	23.3%	9.5%	25.4%	36.9%	22.4%	100.0%	10.1%
Waimea Canyon	56.4%	61.0%	27.9%	62.1%	66.9%	57.7%	100.0%	69.8%
Disc Golf	0.7%	0.2%	0.0%	0.4%	1.9%	0.0%	0.0%	0.0%
Mini Golf	2.8%	0.5%	0.0%	1.6%	1.9%	0.0%	0.0%	0.0%

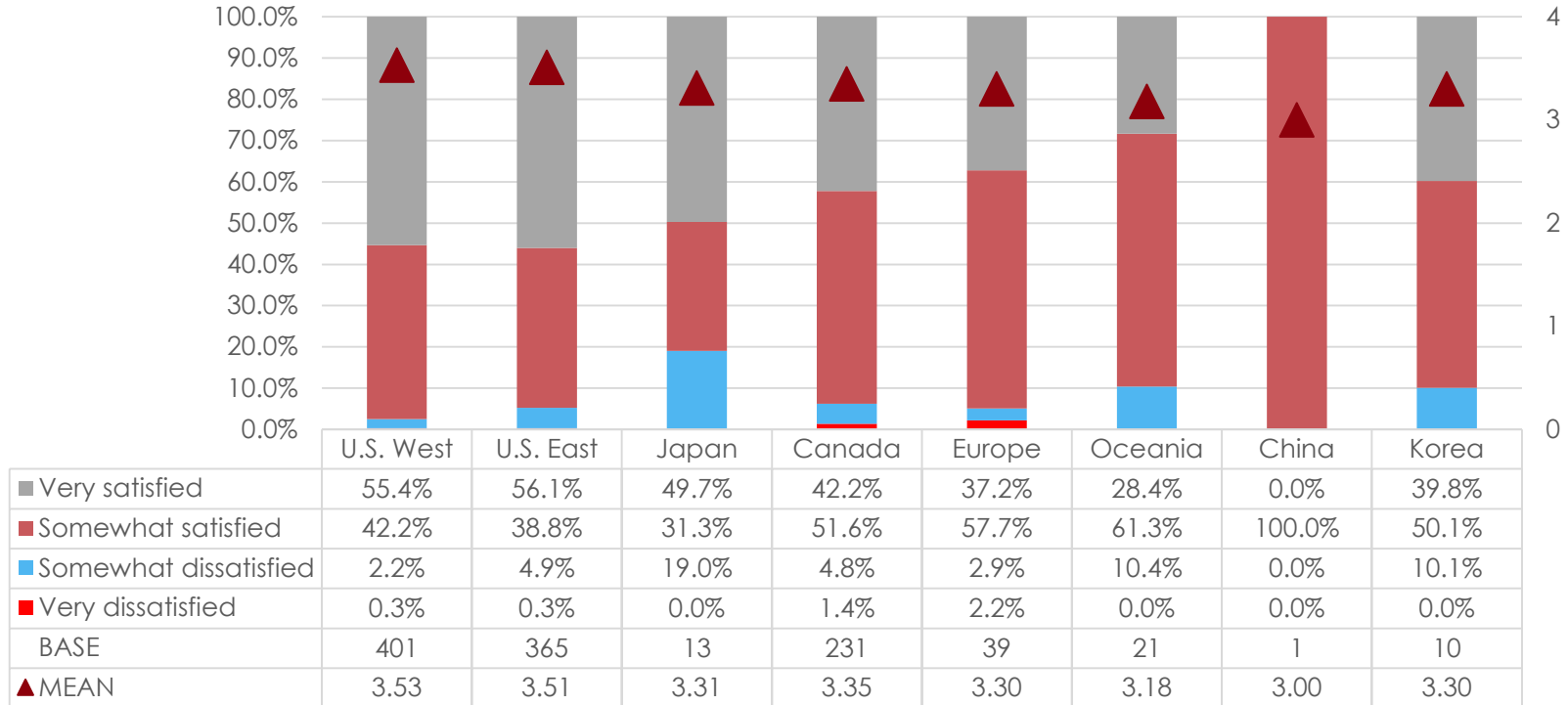
SATISFACTION – ENTERTAINMENT

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



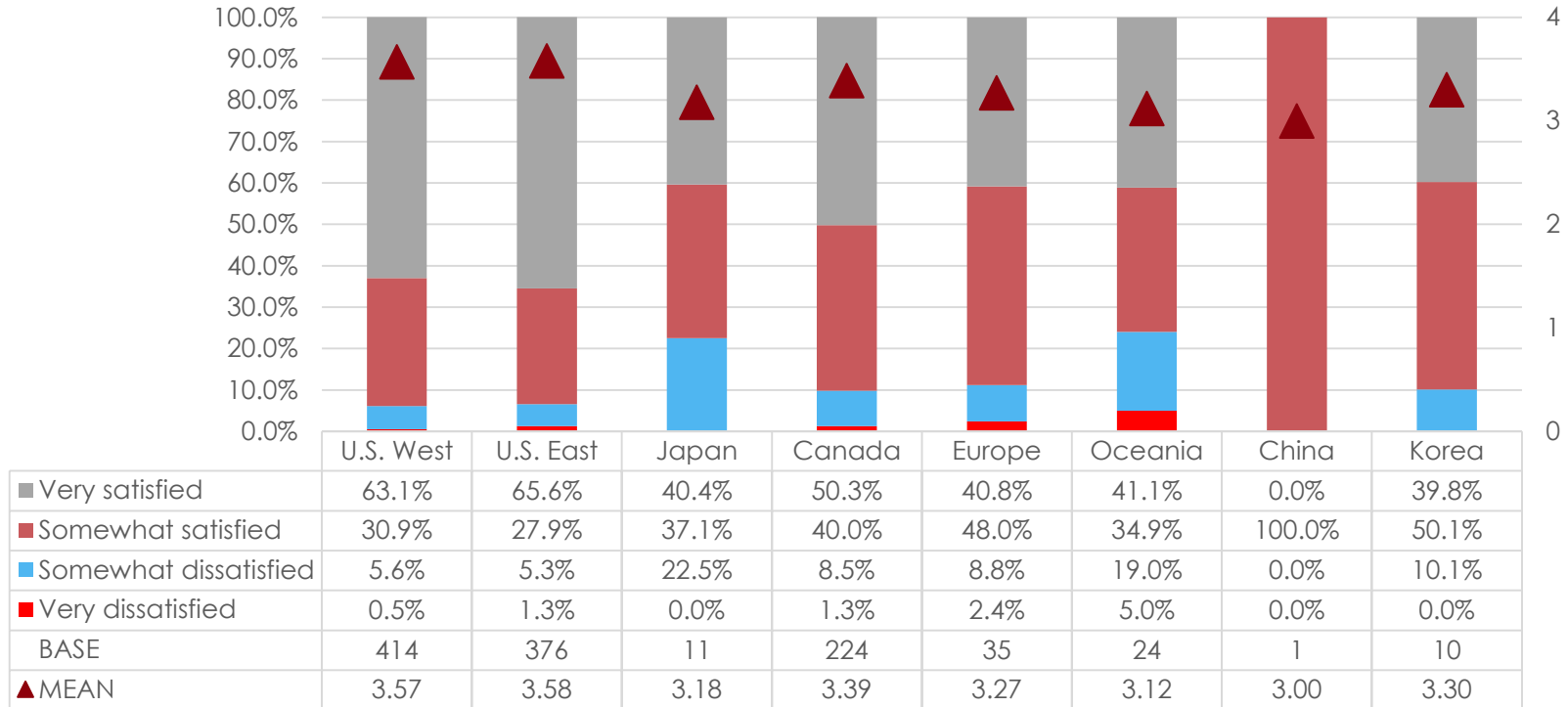
SATISFACTION – SHOPPING

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



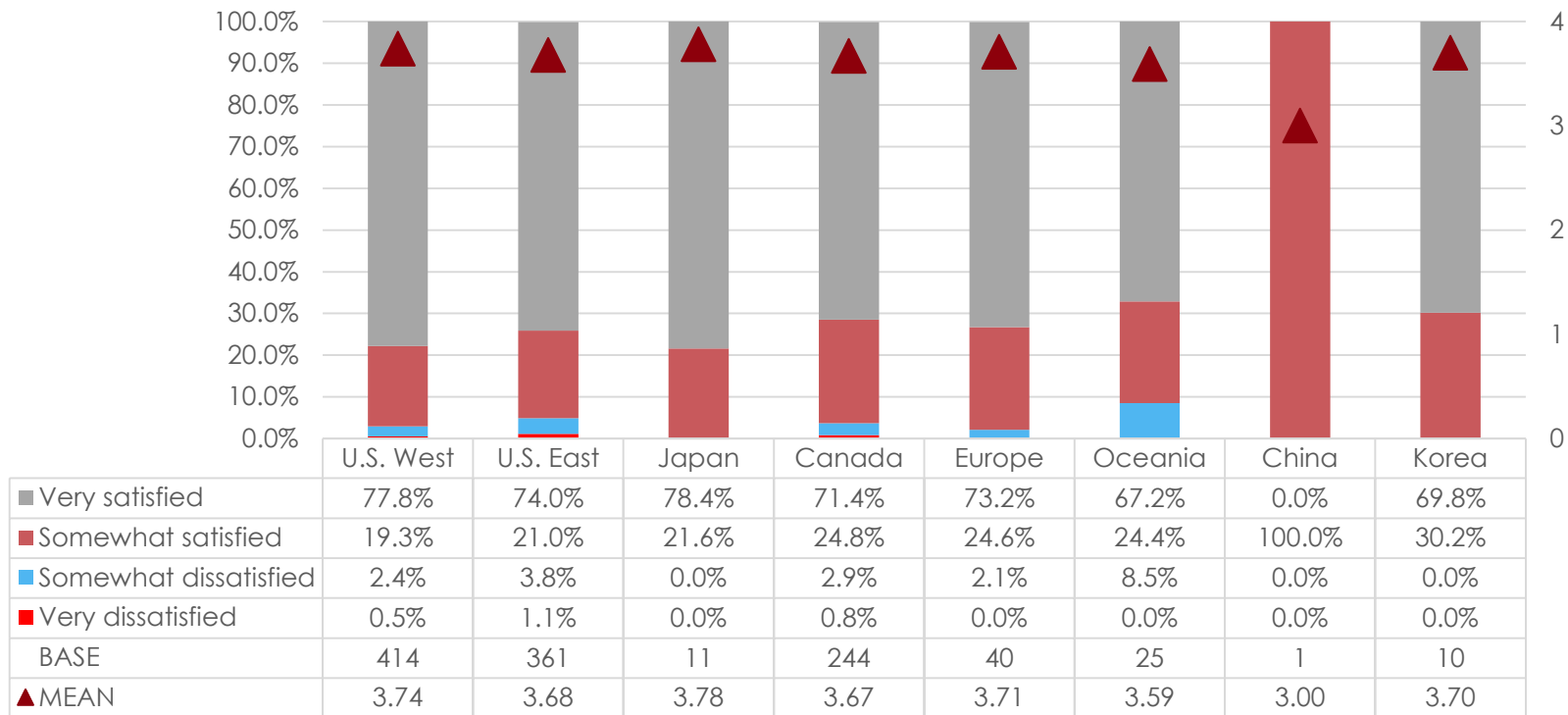
SATISFACTION – DINING

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



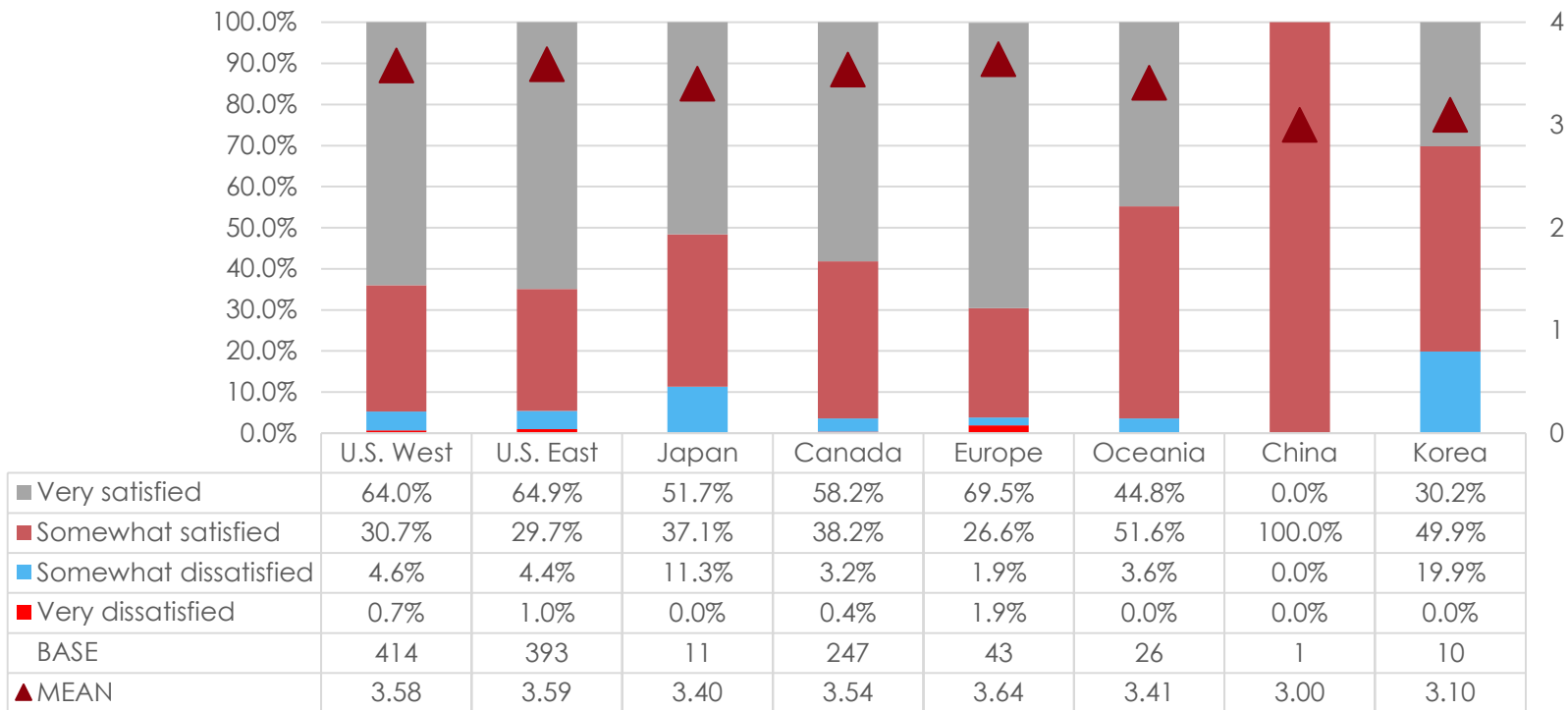
SATISFACTION – BEACHES

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



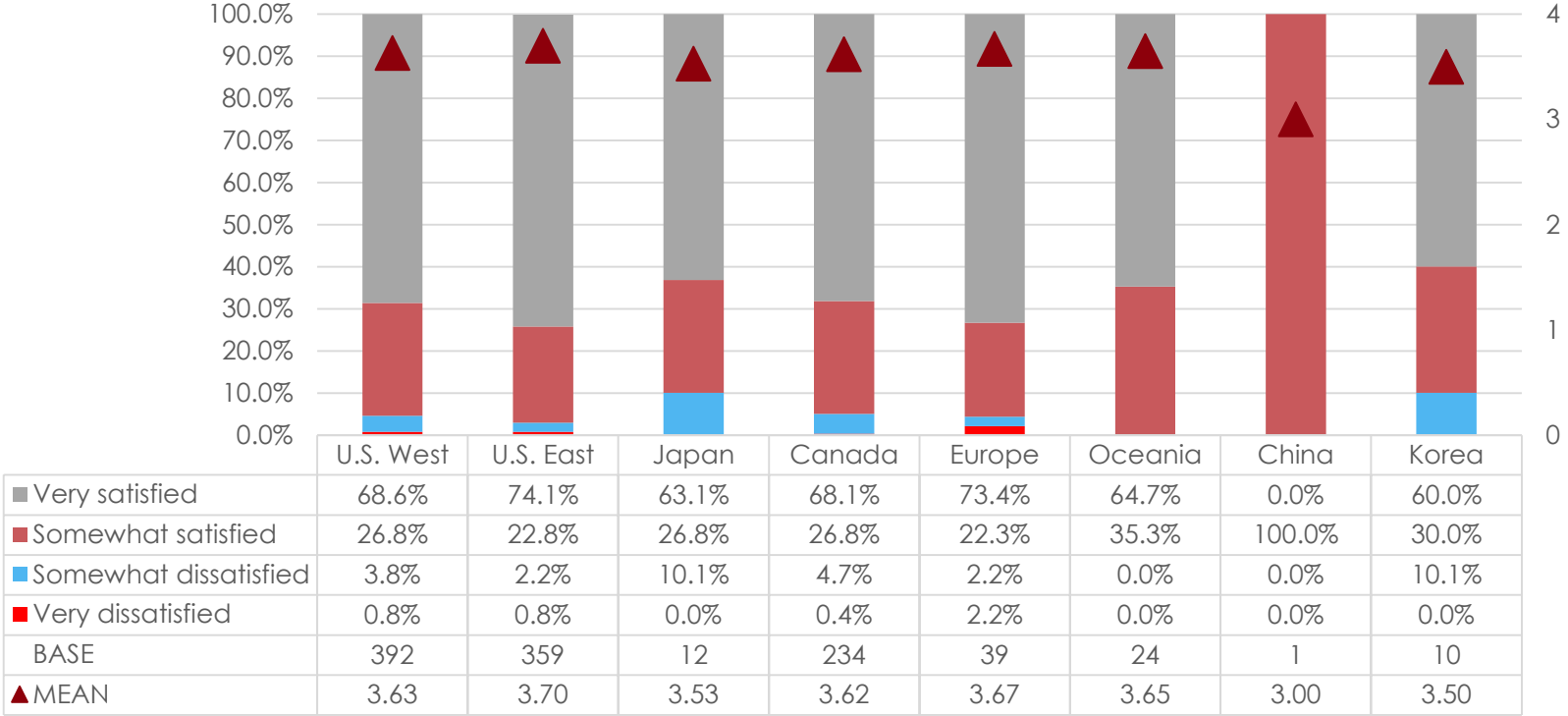
SATISFACTION – PUBLIC AREAS

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



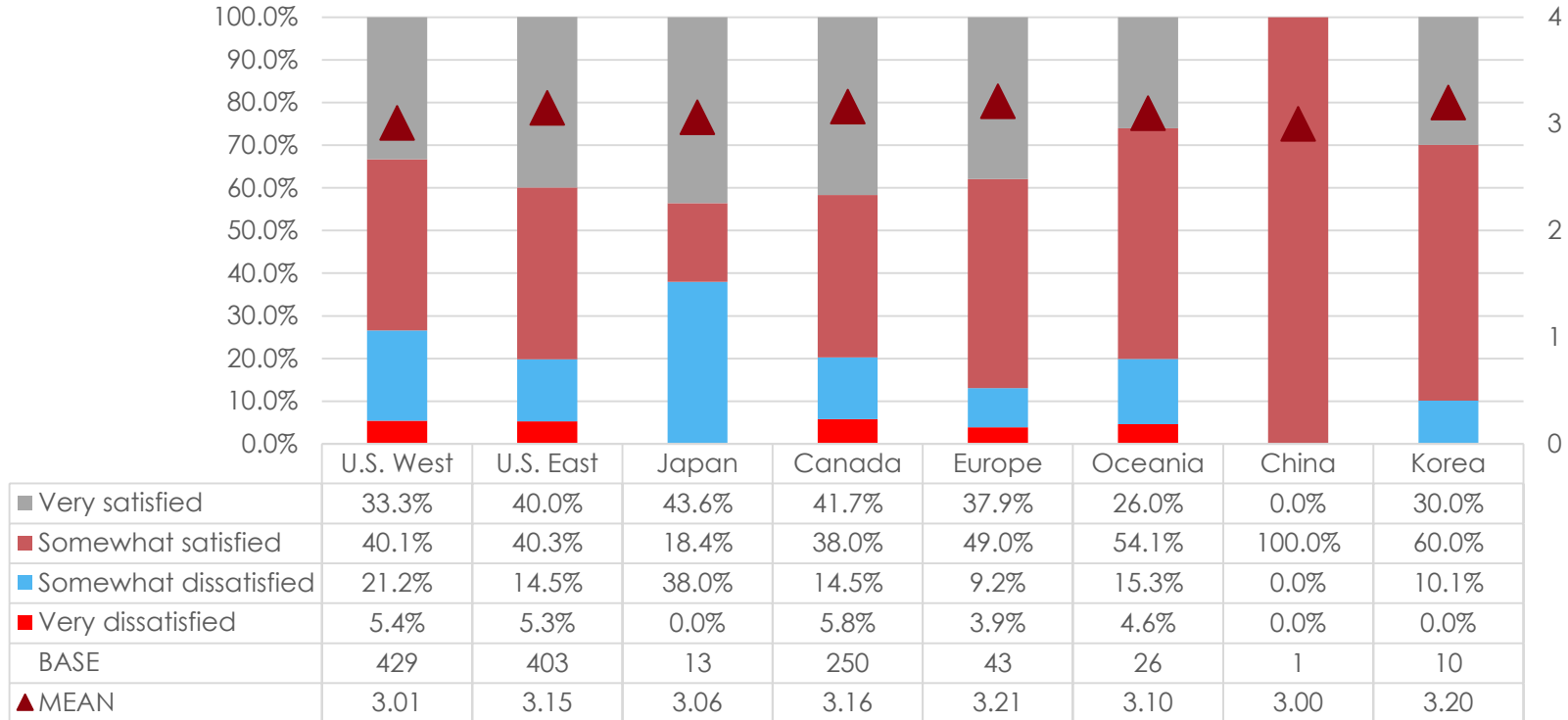
SATISFACTION – PARKS

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



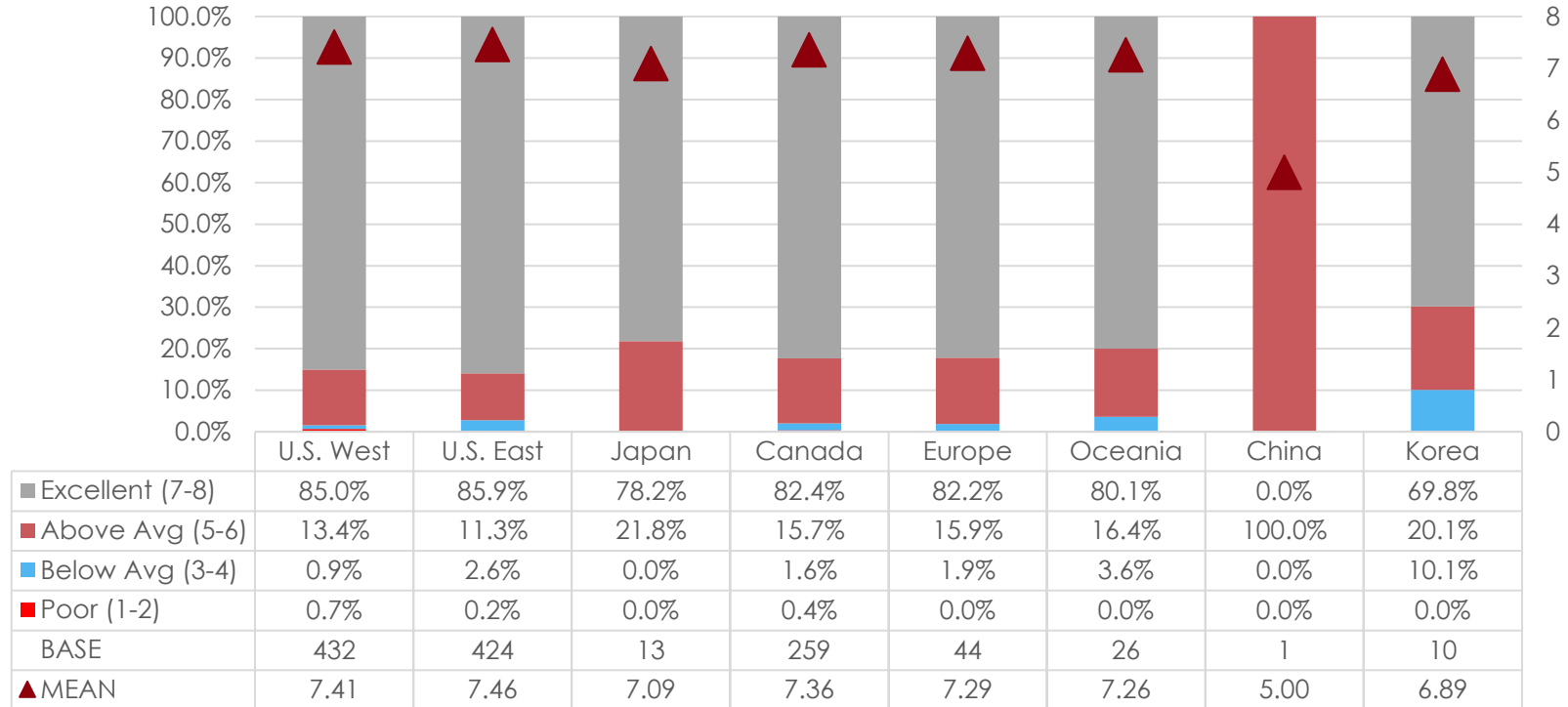
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

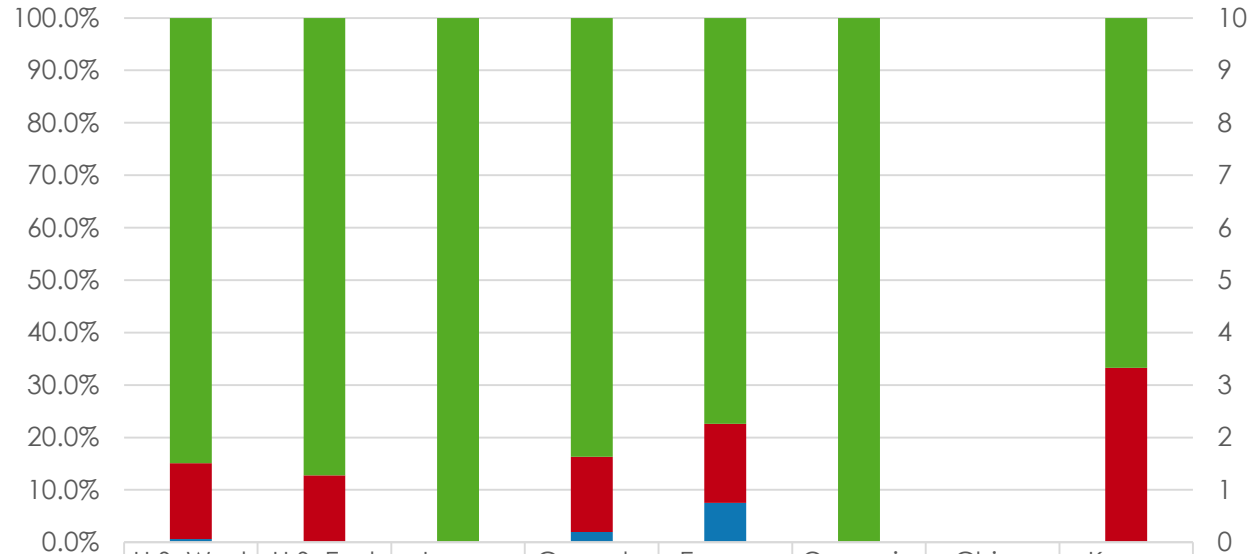
8-pt Rating Scale
8=Excellent / 1=Poor



TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	44.6%	28.2%	38.0%	29.6%	19.1%	14.2%	0.0%	0.0%
Friend recommendation	29.5%	25.0%	37.4%	33.1%	32.5%	31.7%	0.0%	30.0%
Cruise line stop	3.7%	22.8%	18.4%	8.2%	17.2%	31.7%	0.0%	0.0%
Visit friends/ family	4.9%	2.7%	0.0%	2.8%	1.9%	0.0%	0.0%	0.0%
Article/ blog	3.4%	3.5%	0.0%	6.1%	5.1%	3.6%	0.0%	19.9%
Attending conference/ Event	2.3%	3.8%	0.0%	1.6%	2.5%	0.0%	0.0%	0.0%
Travel agent	0.9%	3.2%	6.1%	2.3%	14.0%	10.7%	0.0%	20.1%

SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ 2-Piece, separate mask & snorkel	84.9%	87.2%	100.0%	83.7%	77.4%	100.0%	0.0%	66.7%
■ Full-face snorkel mask	14.5%	12.8%	0.0%	14.3%	15.1%	0.0%	0.0%	33.3%
■ Unsure	0.6%	0.0%	0.0%	2.0%	7.5%	0.0%	0.0%	0.0%
BASE	165	94	2	104	15	10	0	3

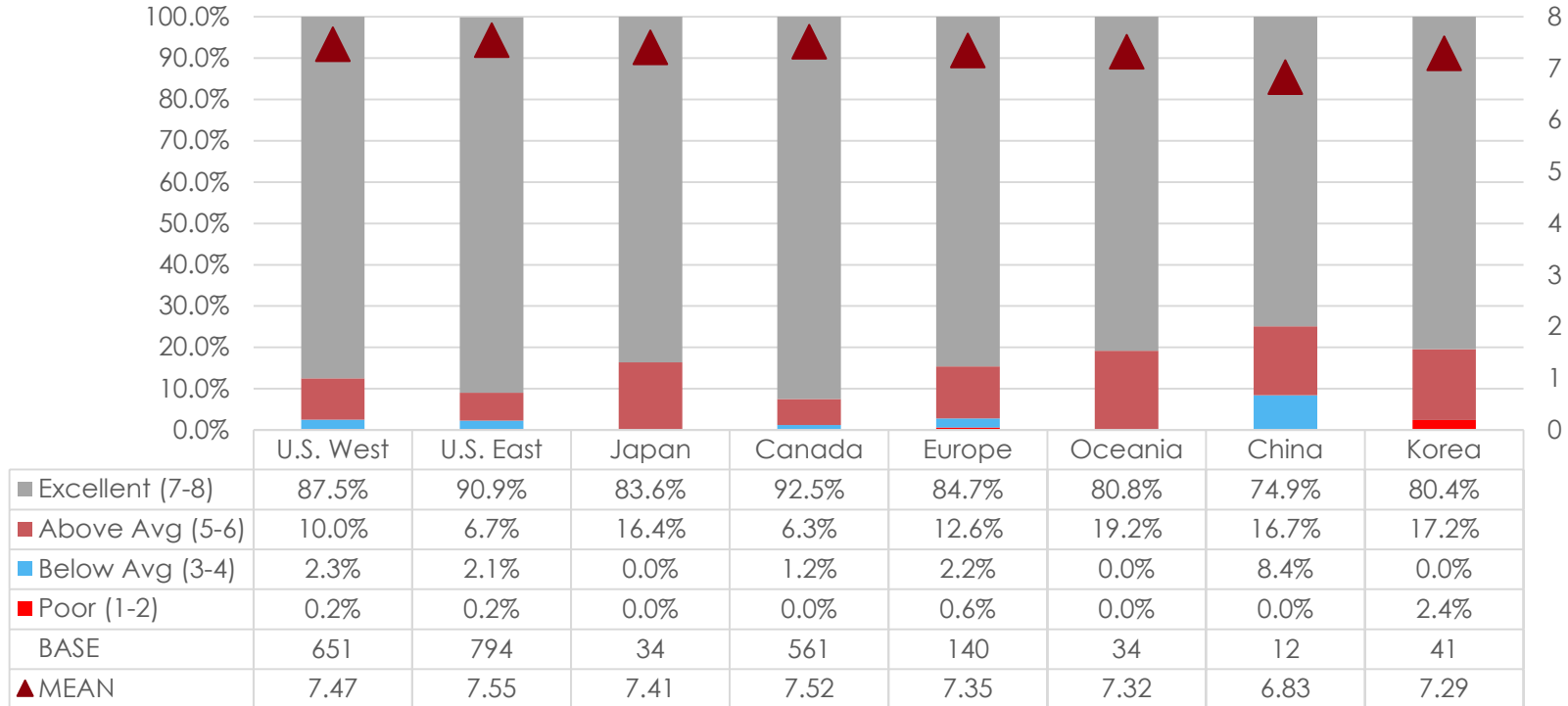
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Did not have to be assisted or rescued	98.8%	100.0%	100.0%	98.0%	100.0%	100.0%	0.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – using full-face mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – other ocean activity	0.6%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
BASE	165	94	2	104	15	10	0	3

SECTION – MAUI

SATISFACTION – MAUI

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

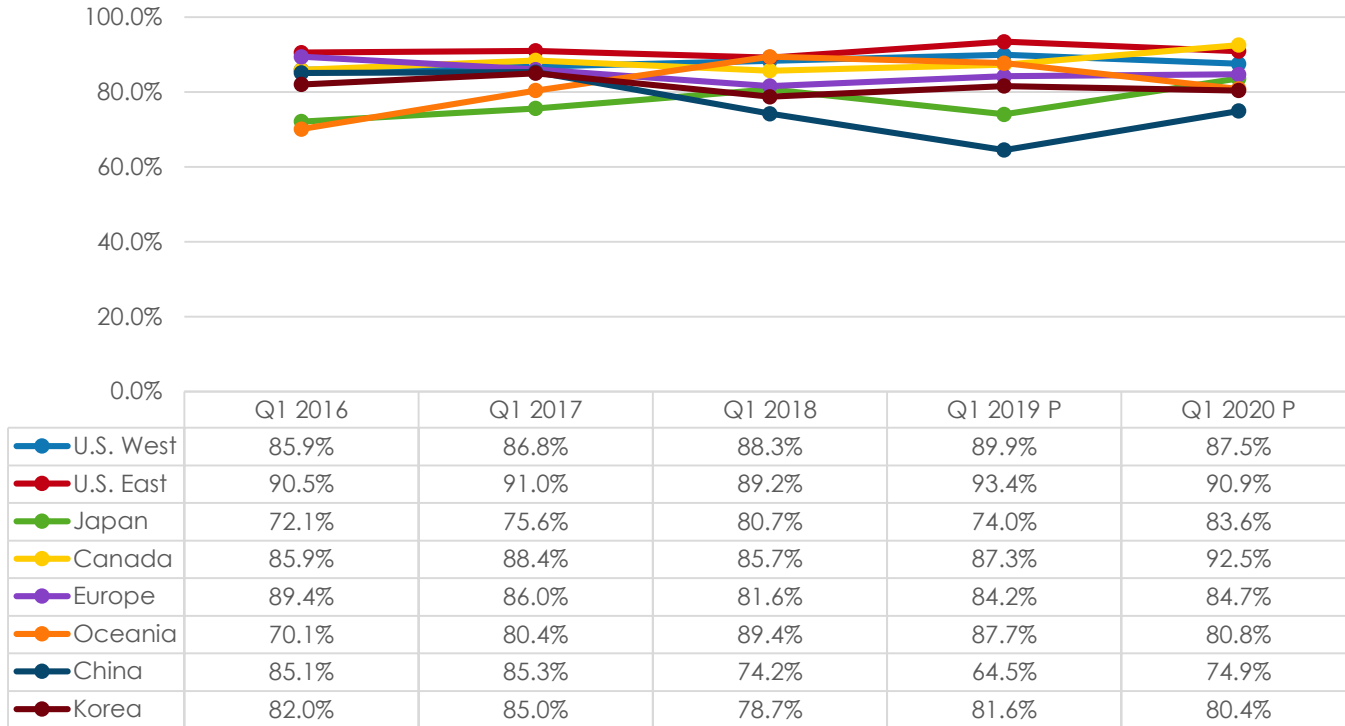


SATISFACTION – MAUI

- **Only visited Maui:** Those from U.S. West and U.S. East who visited only Maui during this most recent trip tended to give the island higher satisfaction scores than those who also visited other islands during their stay.
- **First-time vs Repeat:** First-time visitors to Maui/ state of Hawai'i from U.S. West, U.S. East, and Canada were more satisfied with their stay on Maui than those who have been to the Hawai'i previously.
- **Gender:** Female travelers from U.S. East and U.S. West were more satisfied with their stay on Maui than were males.

SATISFACTION – MAUI

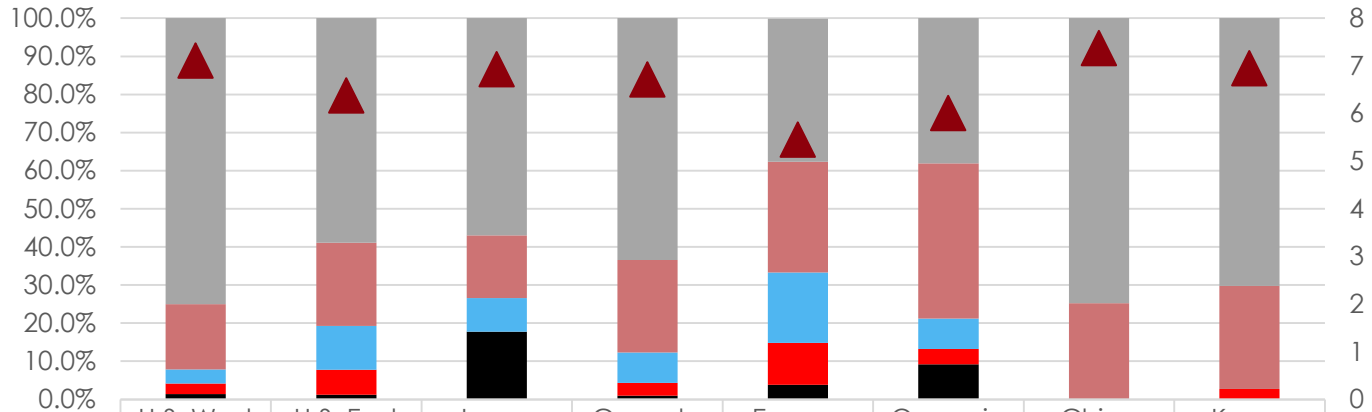
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – MAUI

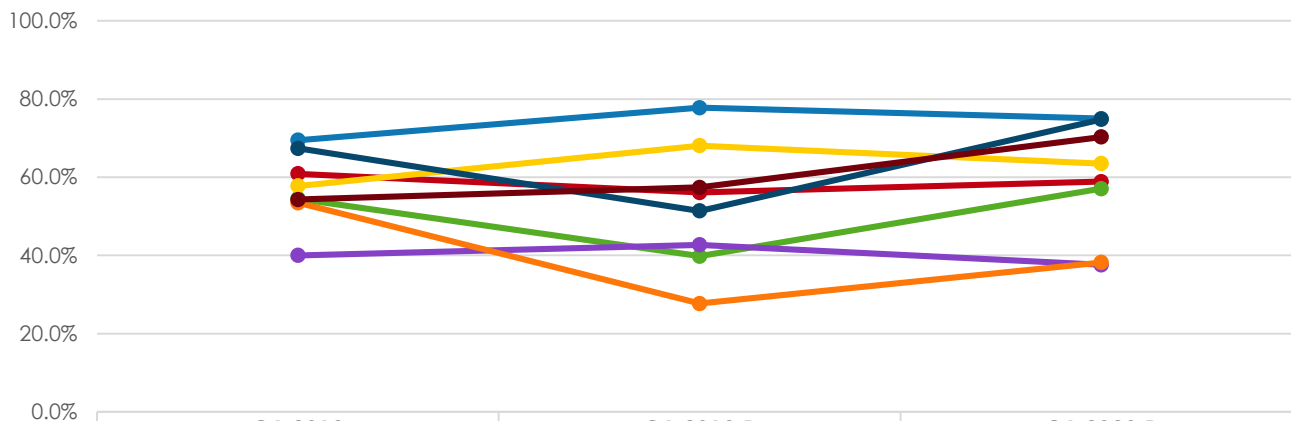
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	75.0%	58.9%	57.1%	63.5%	37.6%	38.2%	74.8%	70.3%
Somewhat likely (5-6)	17.1%	21.8%	16.4%	24.3%	29.0%	40.7%	25.2%	27.1%
Somewhat unlikely (3-4)	3.7%	11.5%	8.8%	8.0%	18.5%	8.0%	0.0%	0.0%
Very unlikely (1-2)	2.8%	6.6%	0.0%	3.3%	11.0%	4.0%	0.0%	2.7%
Not sure	1.4%	1.2%	17.8%	1.0%	3.8%	9.2%	0.0%	0.0%
BASE	571	592	29	502	115	23	8	37
MEAN	7.11	6.38	6.93	6.71	5.45	6.01	7.37	6.95

LIKELIHOOD OF RETURN VISIT – MAUI

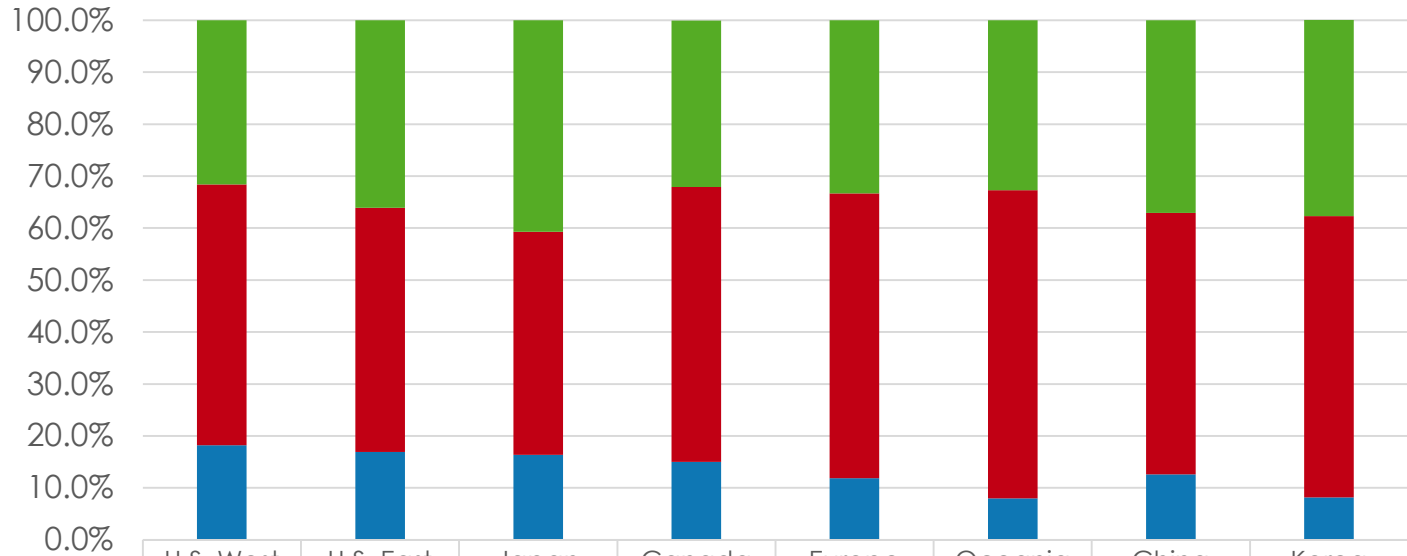
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	69.5%	77.8%	75.0%
U.S. East	60.9%	56.1%	58.9%
Japan	54.5%	39.8%	57.1%
Canada	57.8%	68.1%	63.5%
Europe	40.0%	42.7%	37.6%
Oceania	53.5%	27.7%	38.2%
China	67.4%	51.4%	74.8%
Korea	54.3%	57.4%	70.3%

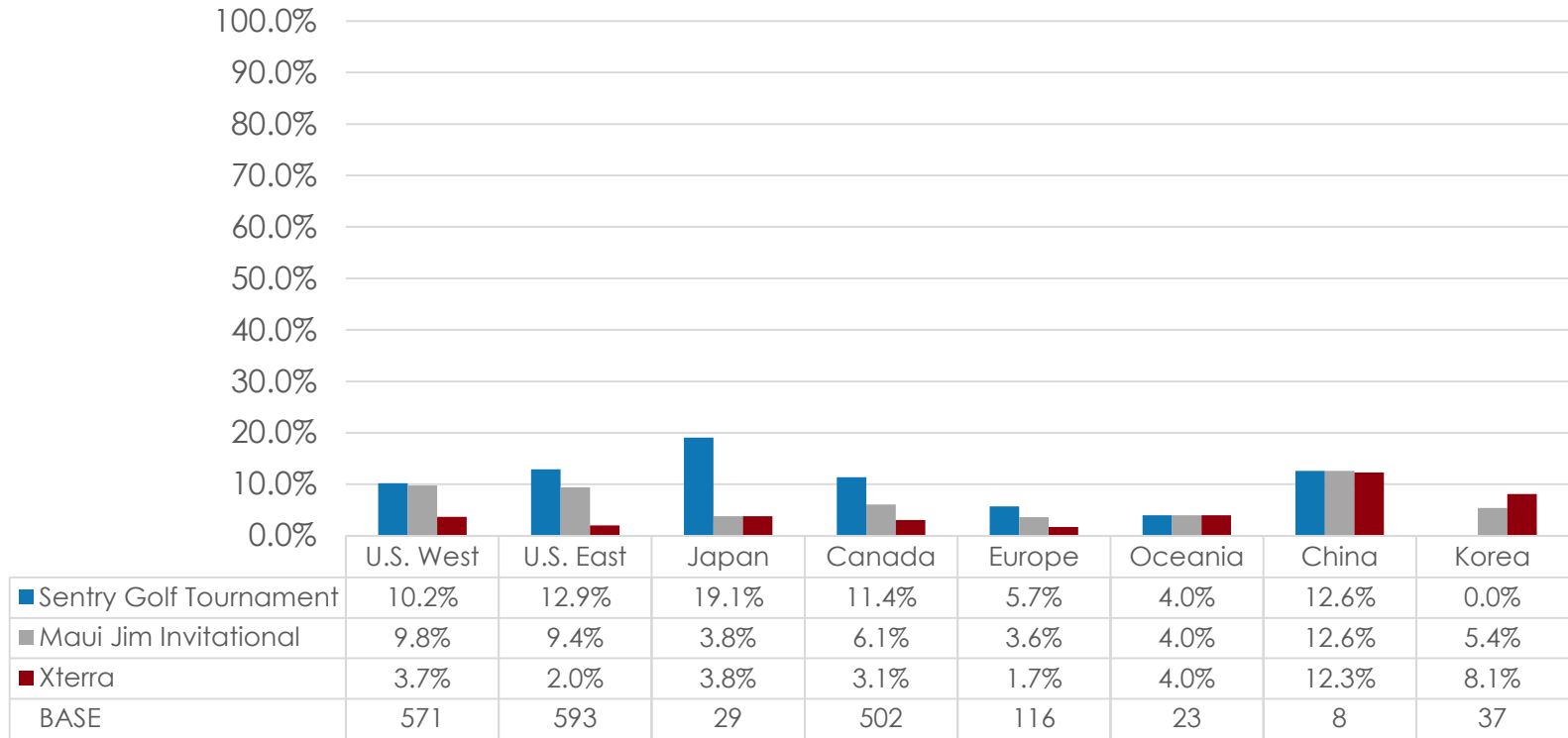
P= Preliminary Data

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Aided Ad Awareness	31.6%	36.1%	40.7%	32.0%	33.3%	32.7%	37.1%	37.8%
■ No Prior Awareness	50.2%	47.0%	42.9%	52.9%	54.8%	59.3%	50.3%	54.1%
■ Unsure	18.2%	16.9%	16.4%	15.0%	11.9%	8.0%	12.6%	8.2%
BASE	571	593	29	502	116	23	8	37

AIDED ADVERTISING AWARENESS – MAUI EVENTS



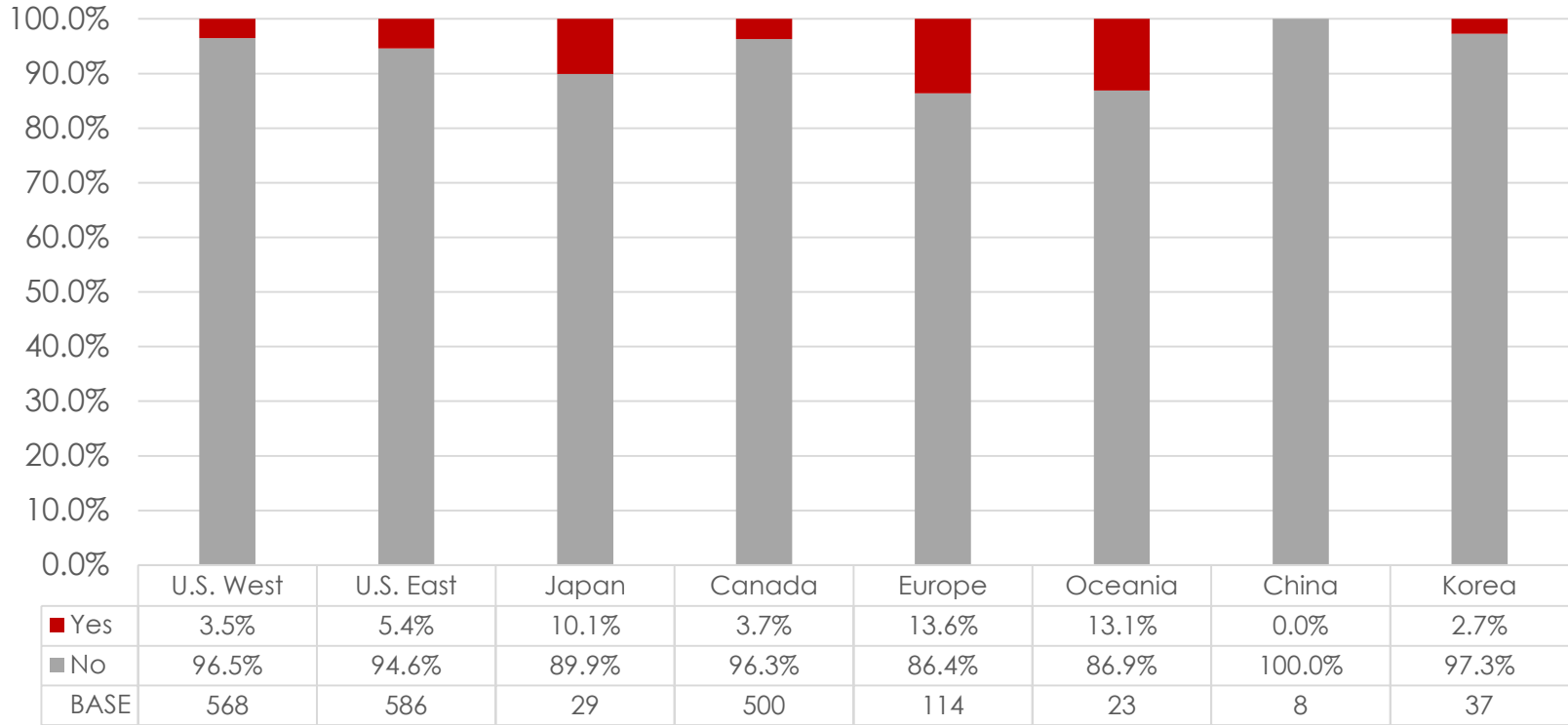
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
None of these	67.6%	63.7%	39.1%	63.0%	58.1%	55.4%	37.4%	26.8%
Hawaiian cultural events	8.9%	15.6%	13.9%	10.9%	17.6%	9.2%	25.2%	8.2%
Outdoor or sporting activities and events	20.1%	21.2%	31.7%	19.4%	21.9%	25.1%	50.3%	24.4%
Social media posts and videos	10.8%	10.6%	7.6%	11.7%	15.7%	9.2%	12.3%	40.8%
Hawaiian Music	7.2%	9.0%	15.3%	10.0%	7.9%	0.0%	0.0%	0.0%
TV programs/ Movies filmed in Hawai'i	6.3%	7.6%	17.8%	10.2%	14.5%	9.2%	0.0%	13.5%

ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	4.2%	1.7%	0.0%	3.5%	1.0%	0.0%	0.0%	0.0%
Aquarium Maui /Maui Ocean Center	20.8%	21.0%	6.3%	24.9%	16.3%	13.1%	12.6%	0.0%
Baldwin Missionary Home Museum	6.1%	4.4%	0.0%	5.6%	3.6%	8.0%	0.0%	0.0%
Hale Pa'i Printing House	0.3%	0.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Haleakala National Park	25.5%	38.0%	38.0%	35.4%	43.9%	27.5%	74.8%	67.5%
Haleki'i-Pihana Heiau State Monument	2.1%	2.4%	6.3%	1.2%	6.2%	0.0%	0.0%	5.4%
Hana Cultural Center	6.5%	12.5%	7.6%	9.3%	17.3%	8.0%	37.1%	5.4%
'Iao Valley State Monument	15.4%	13.4%	21.6%	14.0%	15.8%	8.0%	12.6%	13.3%
Kepaniwai Park & Heritage Gardens	3.5%	5.0%	0.0%	4.3%	8.2%	4.0%	0.0%	0.0%
Kula Botanical Garden	6.6%	7.6%	10.1%	7.9%	12.7%	4.0%	0.0%	2.7%
Maui Historical Society Bailey House Museum	4.9%	2.7%	0.0%	2.4%	3.6%	13.1%	0.0%	0.0%
Whaler's Village Museum	13.7%	18.7%	11.5%	17.0%	16.8%	9.2%	24.8%	2.7%
Wo Hing Temple Museum	2.6%	2.4%	0.0%	1.8%	3.4%	4.0%	0.0%	0.0%

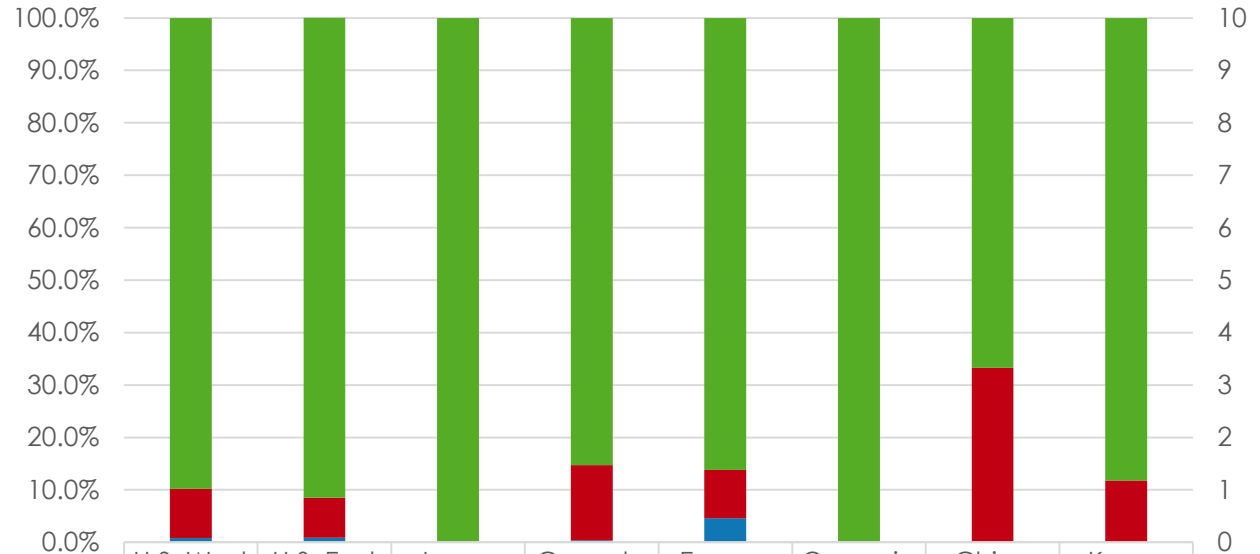
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	50.0%	36.5%	0.0%	31.2%	77.4%	60.5%	0.0%	0.0%
Wedding/ honeymoon, anniversary/ birthday/ funeral	15.0%	28.4%	0.0%	32.0%	0.0%	39.5%	0.0%	0.0%
Whale watching	9.9%	16.2%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%
Other festival/ concert	15.0%	6.4%	37.8%	0.0%	7.5%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	10.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%
Maui Marathon	0.0%	6.1%	0.0%	15.3%	0.0%	0.0%	0.0%	0.0%
Hawai'i Food & Wine Fest	0.0%	3.4%	0.0%	0.0%	7.5%	0.0%	0.0%	100.0%
Other	0.0%	0.0%	62.2%	0.0%	7.5%	0.0%	0.0%	0.0%
Kapalua Food & Wine Fest	0.0%	3.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%

SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
2-Piece, separate mask & snorkel	89.8%	91.6%	100.0%	85.3%	86.2%	100.0%	66.7%	88.2%
Full-face snorkel mask	9.4%	7.6%	0.0%	14.3%	9.2%	0.0%	33.3%	11.8%
Unsure	0.8%	0.9%	0.0%	0.4%	4.6%	0.0%	0.0%	0.0%
BASE	255	242	5	246	47	10	3	17

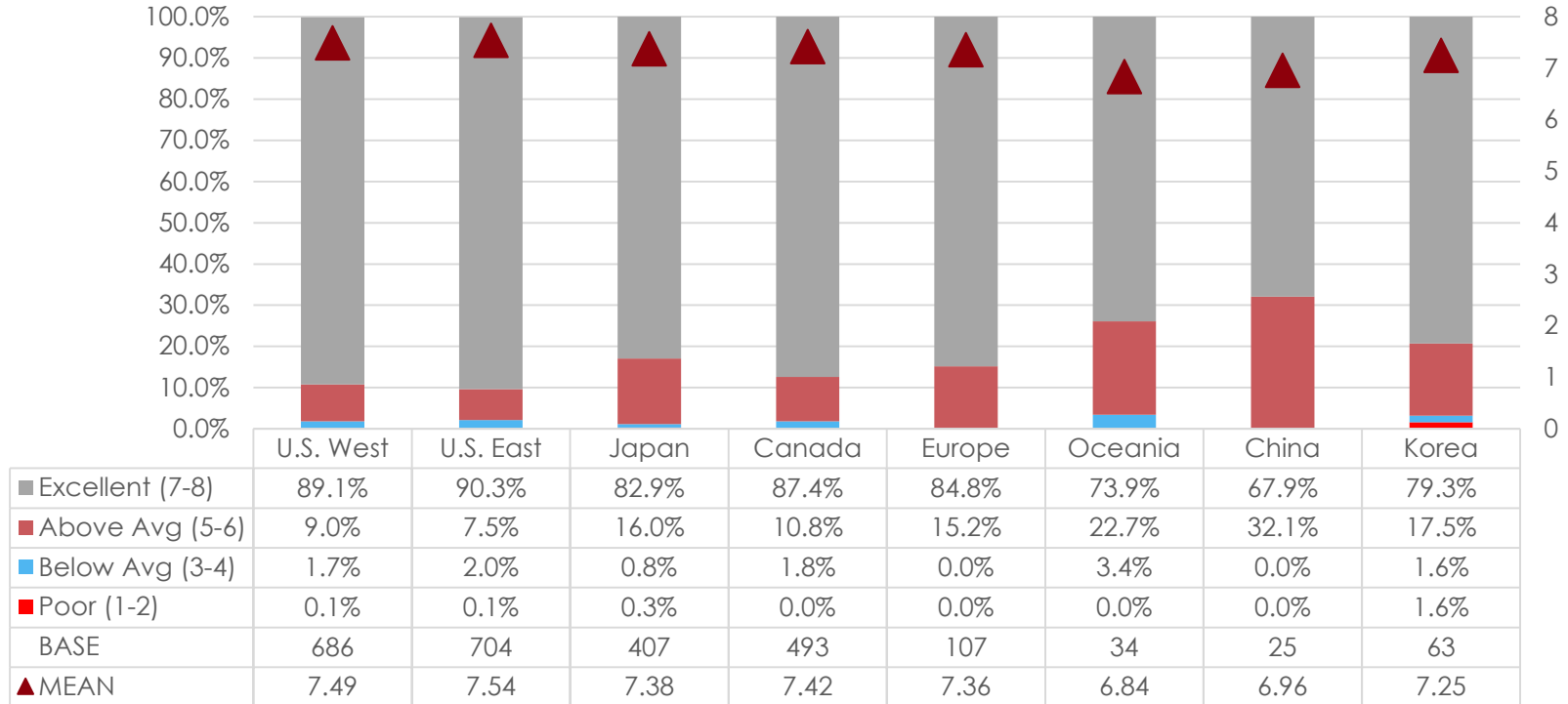
SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Did not have to be assisted or rescued	99.6%	99.2%	100.0%	99.2%	100.0%	100.0%	100.0%	94.1%
Yes, needed assistance – using 2-piece mask & snorkel	0.4%	0.8%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – using full-face mask	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – other ocean activity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%
BASE	255	242	5	246	47	10	3	17

SECTION – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

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

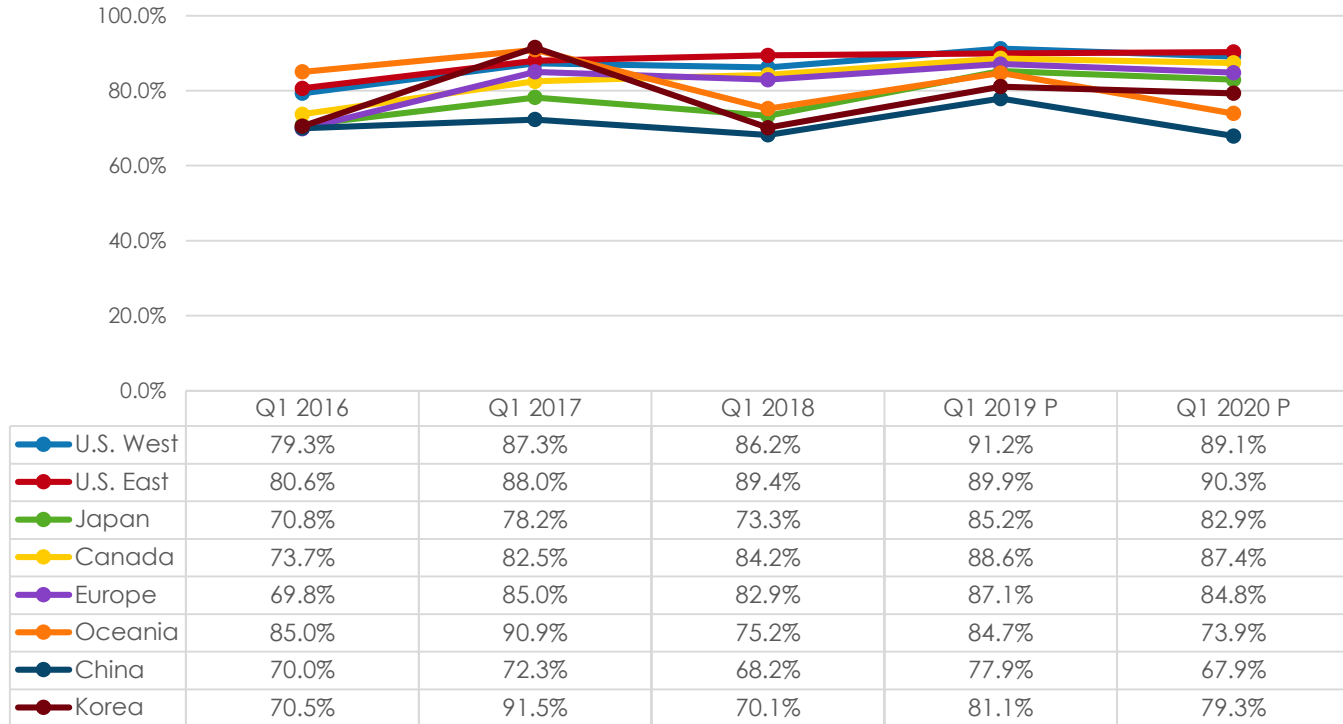


SATISFACTION – ISLAND OF HAWAI‘I

- **Visited only Hawai‘i Island:** Those travelers from U.S. West who only visited the Island of Hawai‘i during this trip were more satisfied overall than those visiting multiple islands from this market.
- **Gender:** Female travelers from U.S. West were more satisfied with their stay on the Island of Hawai‘i than were males.
- **Travel party size:** Visitors from U.S. West in larger travel parties of three or more were more satisfied with their trip than were those who traveled to the island in pairs.

SATISFACTION – ISLAND OF HAWAI‘I

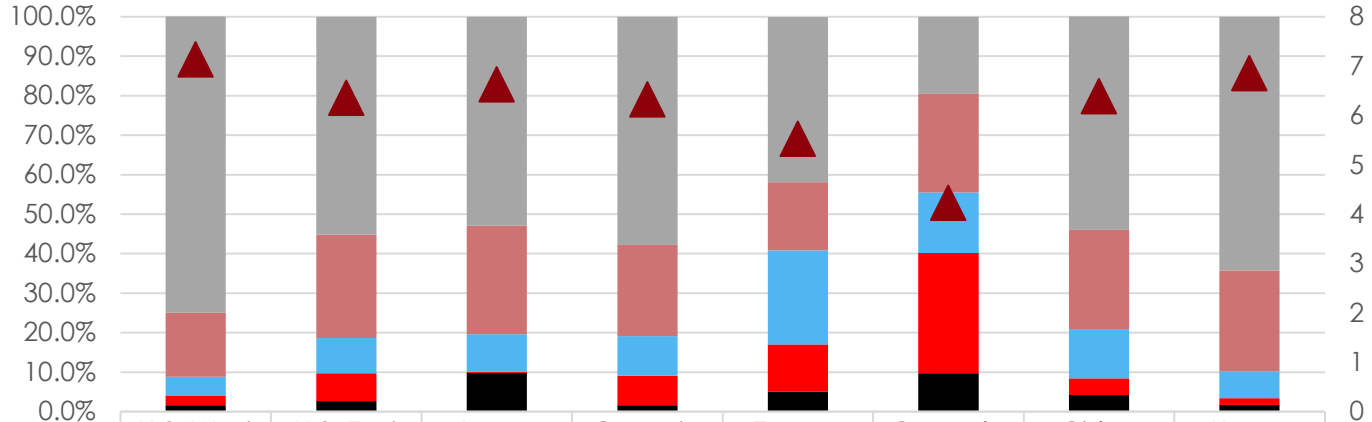
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

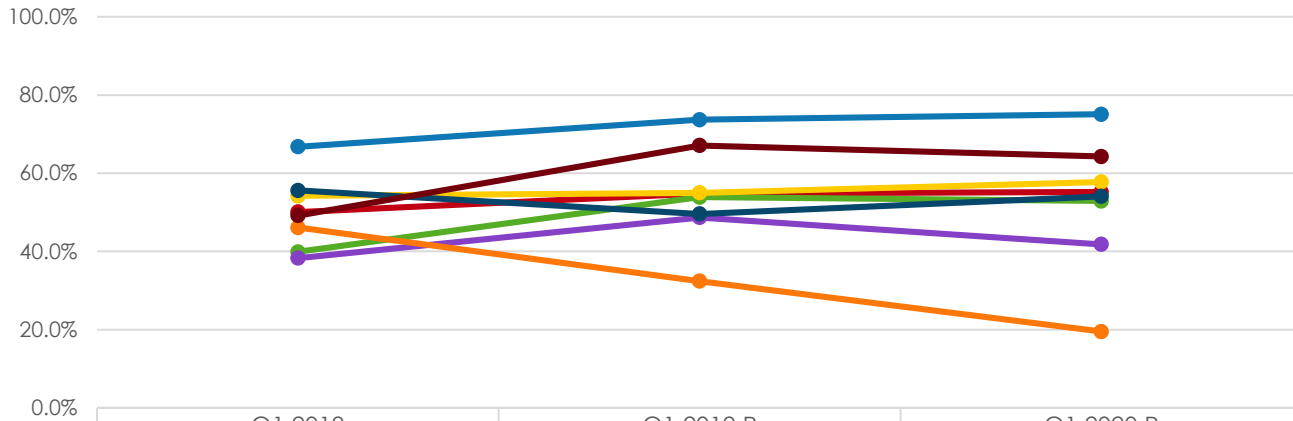
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	75.1%	55.2%	52.9%	57.8%	41.8%	19.5%	54.1%	64.3%
■ Somewhat likely (5-6)	16.2%	26.2%	27.5%	23.1%	17.3%	25.0%	25.1%	25.5%
■ Somewhat unlikely (3-4)	4.8%	8.9%	9.5%	10.0%	23.8%	15.3%	12.5%	6.8%
■ Very unlikely (1-2)	2.4%	7.0%	0.3%	7.5%	11.9%	30.5%	4.2%	1.7%
■ Not sure	1.6%	2.7%	9.8%	1.6%	5.1%	9.7%	4.2%	1.7%
BASE	625	507	397	443	82	20	24	59
▲ MEAN	7.14	6.36	6.63	6.33	5.53	4.23	6.39	6.86

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

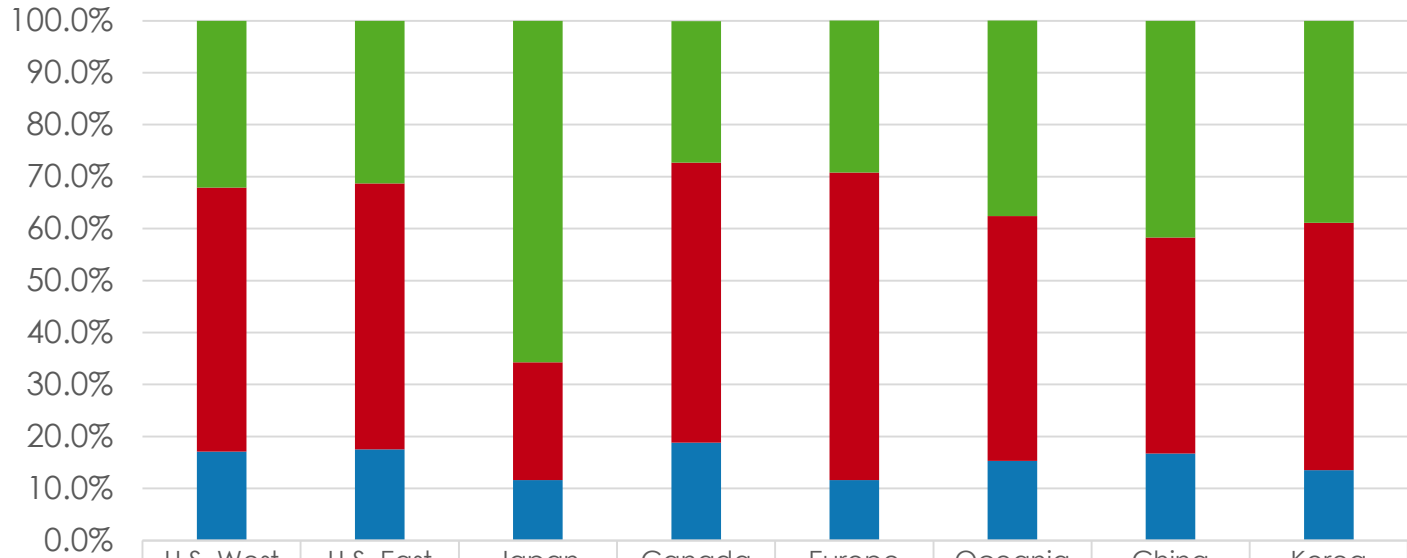
TOP BOX – EXCELLENT (7-8)



	Q1 2018	Q1 2019 P	Q1 2020 P
U.S. West	66.8%	73.7%	75.1%
U.S. East	50.1%	54.8%	55.2%
Japan	39.9%	53.9%	52.9%
Canada	54.2%	55.0%	57.8%
Europe	38.3%	48.7%	41.8%
Oceania	46.1%	32.4%	19.5%
China	55.6%	49.6%	54.1%
Korea	49.2%	67.1%	64.3%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



■ Aided Ad Awareness	32.1%	31.3%	65.7%	27.2%	29.3%	37.7%	41.7%	38.9%
■ No Prior Awareness	50.8%	51.2%	22.7%	53.9%	59.2%	47.1%	41.6%	47.6%
■ Unsure	17.1%	17.5%	11.6%	18.8%	11.6%	15.3%	16.7%	13.5%
BASE	626	508	397	443	82	20	24	59

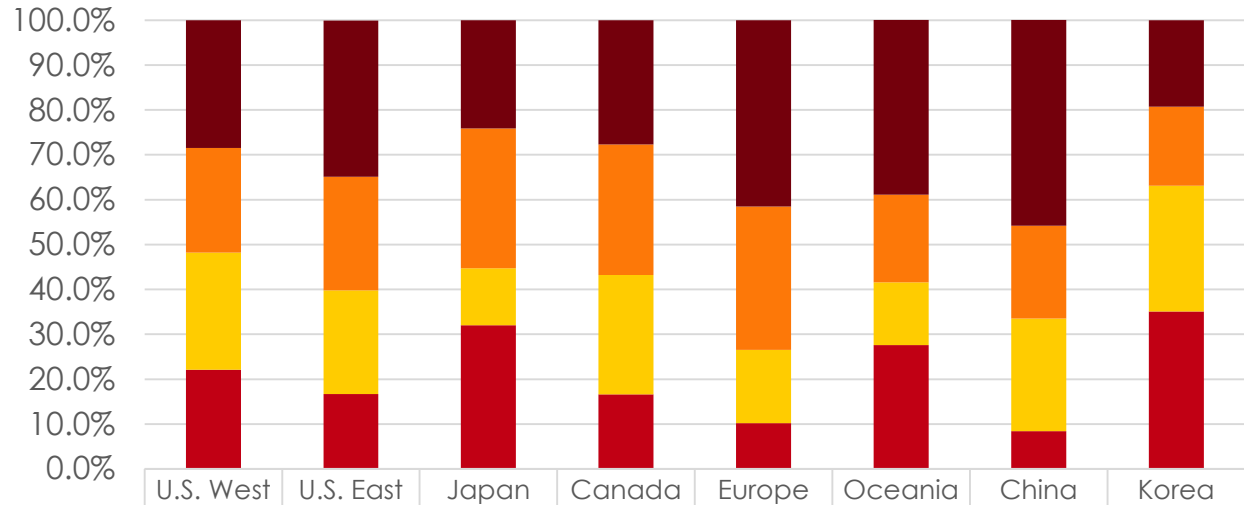
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
‘Akaka Falls	21.9%	30.6%	23.3%	37.2%	40.8%	15.3%	24.9%	20.5%
Botanical Gardens	22.1%	21.0%	1.4%	24.7%	31.6%	30.5%	24.9%	6.9%
H.N. Greenwell Store	4.0%	3.5%	1.2%	5.9%	2.4%	0.0%	4.2%	3.4%
Hawai‘i Volcanoes National Park	45.9%	65.4%	56.7%	59.0%	80.3%	54.2%	87.4%	60.4%
Hilo Farmers Market	21.9%	19.8%	13.5%	23.0%	23.8%	36.0%	24.9%	17.2%
Hulihe‘e Palace	5.1%	5.7%	7.2%	5.9%	5.8%	11.0%	0.0%	6.9%
‘Imiloa Astronomy Ctr	2.1%	2.1%	0.9%	4.5%	4.8%	4.2%	29.1%	6.8%
Kaloko-Honokohau National Historical Park	9.4%	14.0%	2.3%	13.4%	14.6%	5.5%	8.3%	0.0%
Kona Coffee Living History Farm	12.1%	18.3%	29.0%	19.5%	16.7%	11.0%	4.2%	65.5%
Lili‘uokalani Park and Garden	7.2%	8.5%	2.2%	6.3%	15.6%	5.5%	0.0%	1.7%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

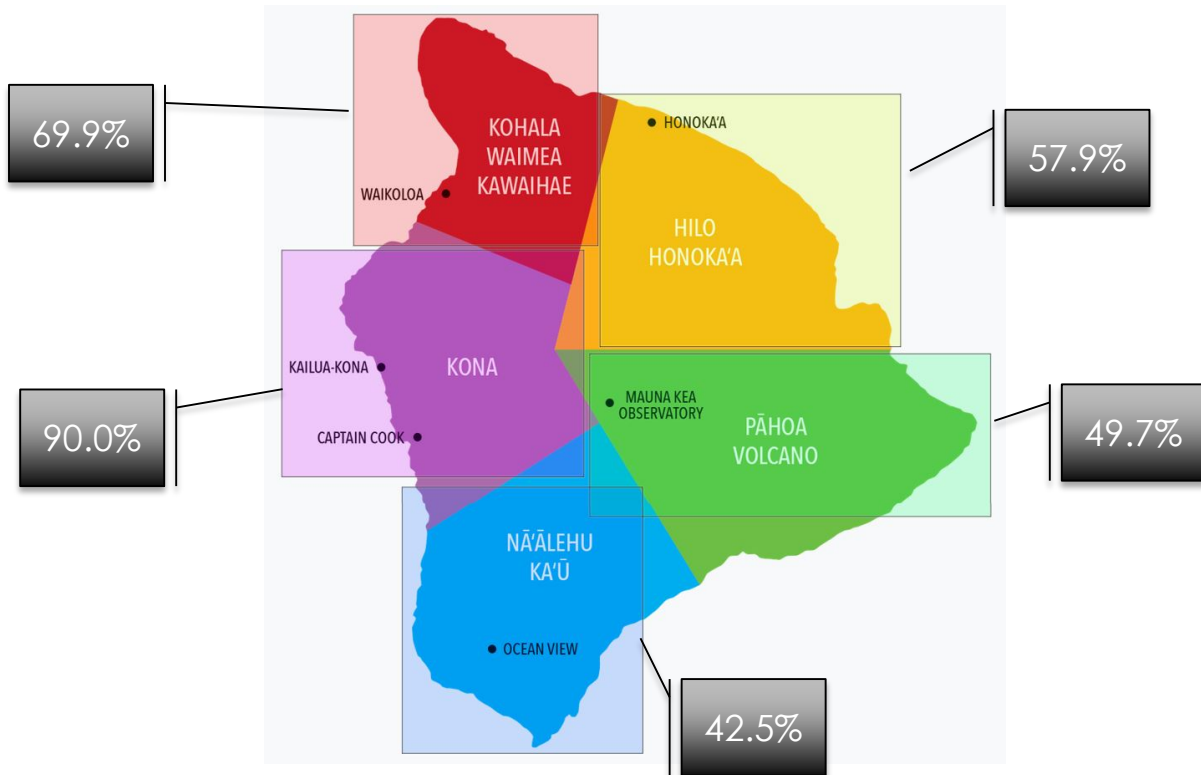
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Lyman House Memorial Museum	2.7%	1.8%	0.5%	2.7%	4.4%	0.0%	0.0%	1.7%
Maunakea	12.8%	16.3%	40.8%	22.4%	35.4%	20.8%	54.2%	39.6%
Orchid Farm	2.6%	4.4%	0.5%	2.9%	4.8%	4.2%	4.2%	5.1%
Pacific Tsunami Museum	2.6%	2.8%	1.3%	4.5%	10.5%	5.5%	4.2%	3.4%
Pana'ewa Rainforest Zoo & Garden	4.0%	4.4%	0.5%	5.5%	2.4%	0.0%	8.4%	3.4%
Pu'uhonua o Honaunau National Historical Park	22.7%	24.1%	3.8%	25.7%	27.2%	0.0%	0.0%	13.8%
Pu'ukohola Heia National Historical Site	12.5%	14.0%	2.3%	13.4%	12.6%	5.5%	4.2%	1.7%
Punalu'u Black Sand Beach	28.3%	41.6%	23.6%	42.4%	36.7%	26.3%	49.9%	27.7%
Rainbow Falls	20.4%	30.8%	17.5%	31.3%	40.8%	37.3%	37.5%	25.9%
Volcano Art Center	10.6%	10.2%	13.9%	10.7%	26.9%	19.5%	8.3%	24.1%

TRAVEL ON ISLAND OF HAWAI'I



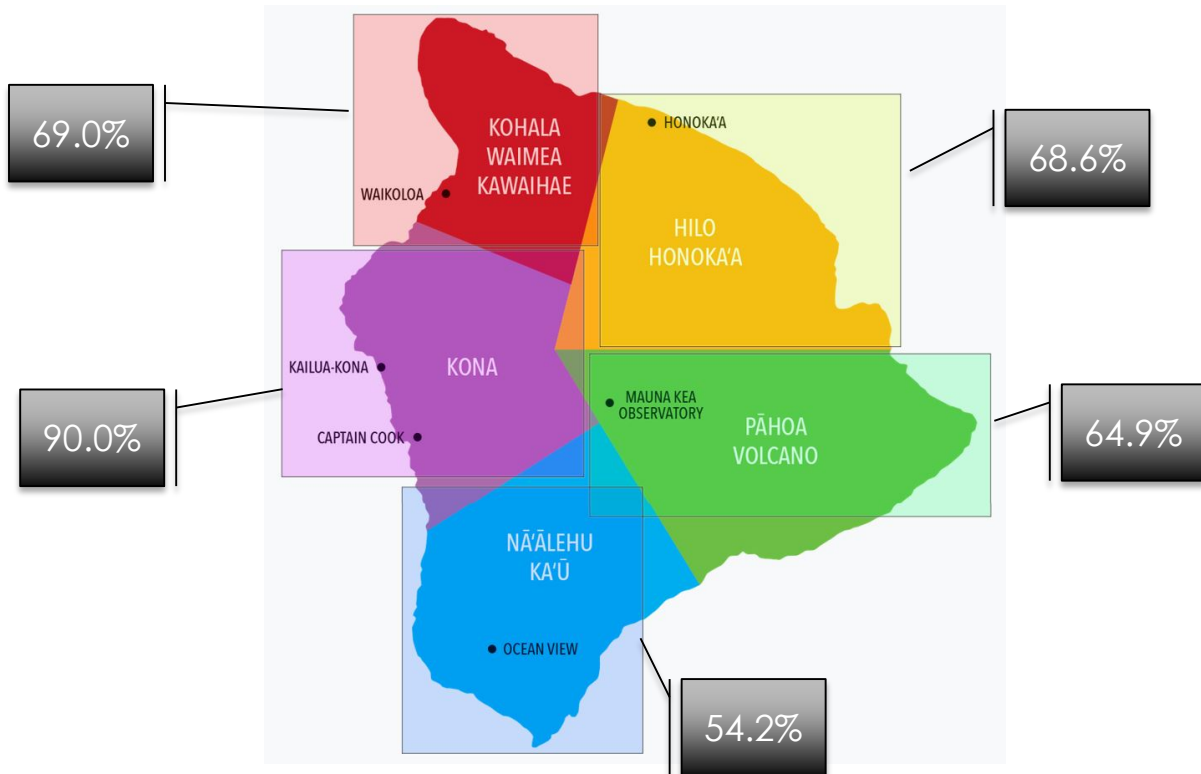
Traveled to other side of island	28.5%	34.8%	24.1%	27.7%	41.5%	39.0%	45.9%	19.3%
Traveled more than 1 hour	23.3%	25.3%	31.2%	29.1%	32.0%	19.5%	20.7%	17.6%
Traveled 1 hour or less one way to reach activity	26.1%	23.1%	12.7%	26.6%	16.3%	14.0%	25.1%	28.0%
Enjoy activities- short drive from accommodations	22.1%	16.7%	32.0%	16.6%	10.2%	27.6%	8.4%	35.1%
BASE	621	503	393	439	82	20	24	57

AREAS VISITED U.S. WEST

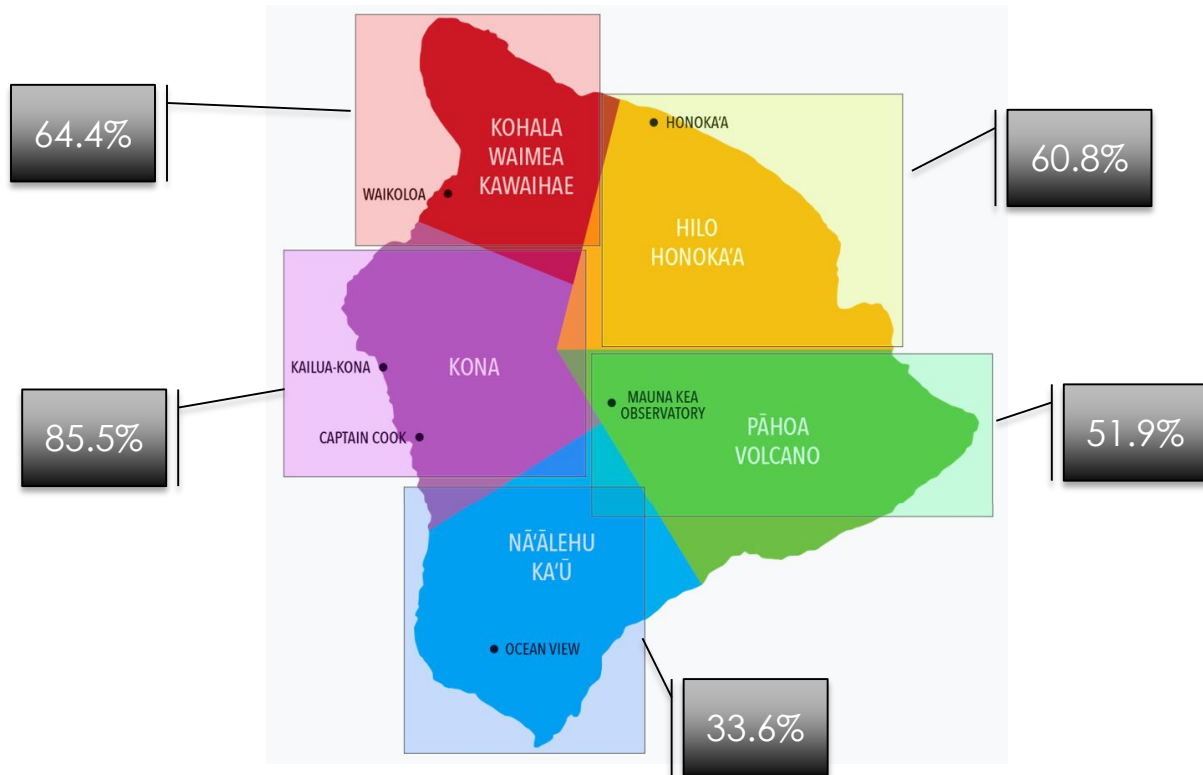


119 Q Which of the following areas did you visit during your stay on Hawai'i Island?

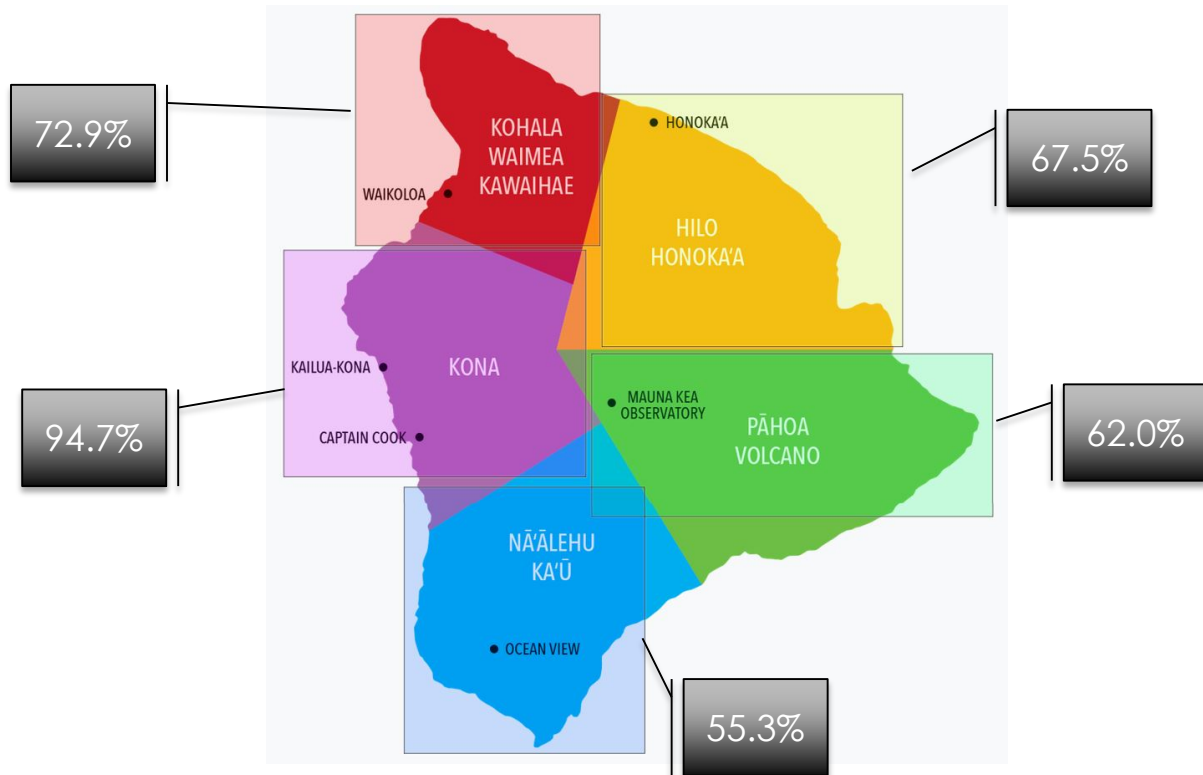
AREAS VISITED U.S. EAST



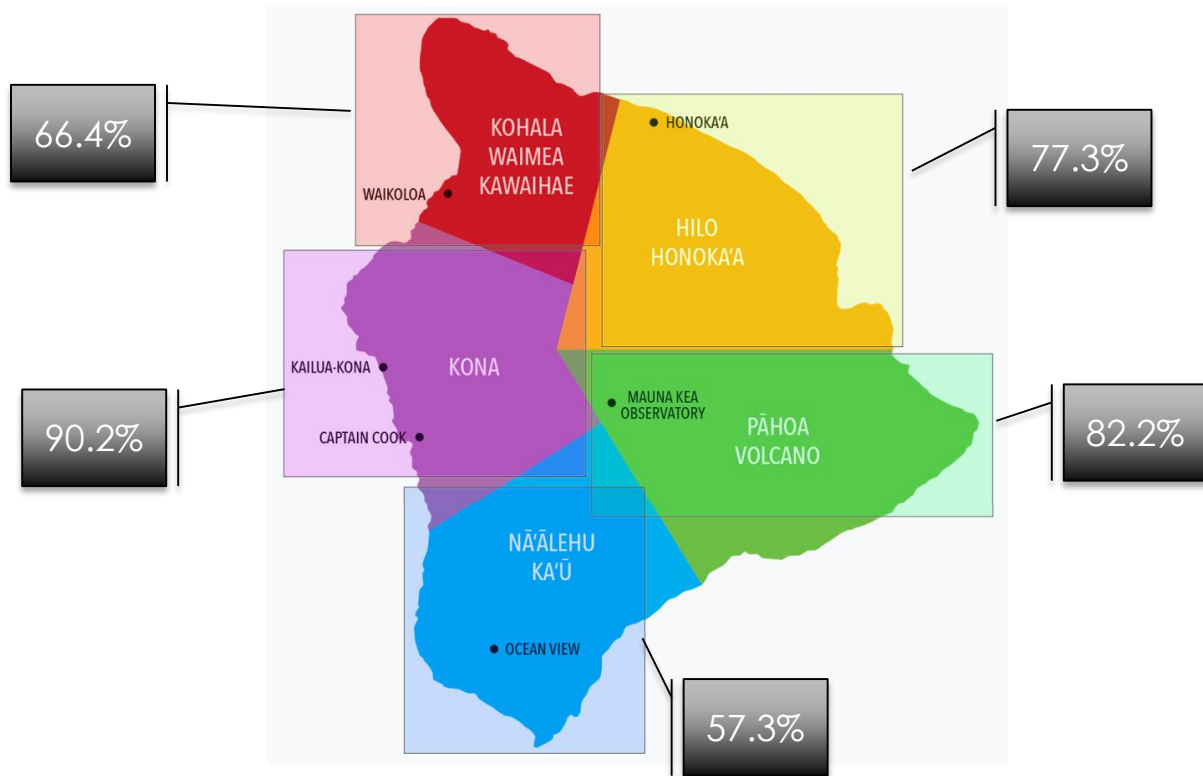
AREAS VISITED JAPAN



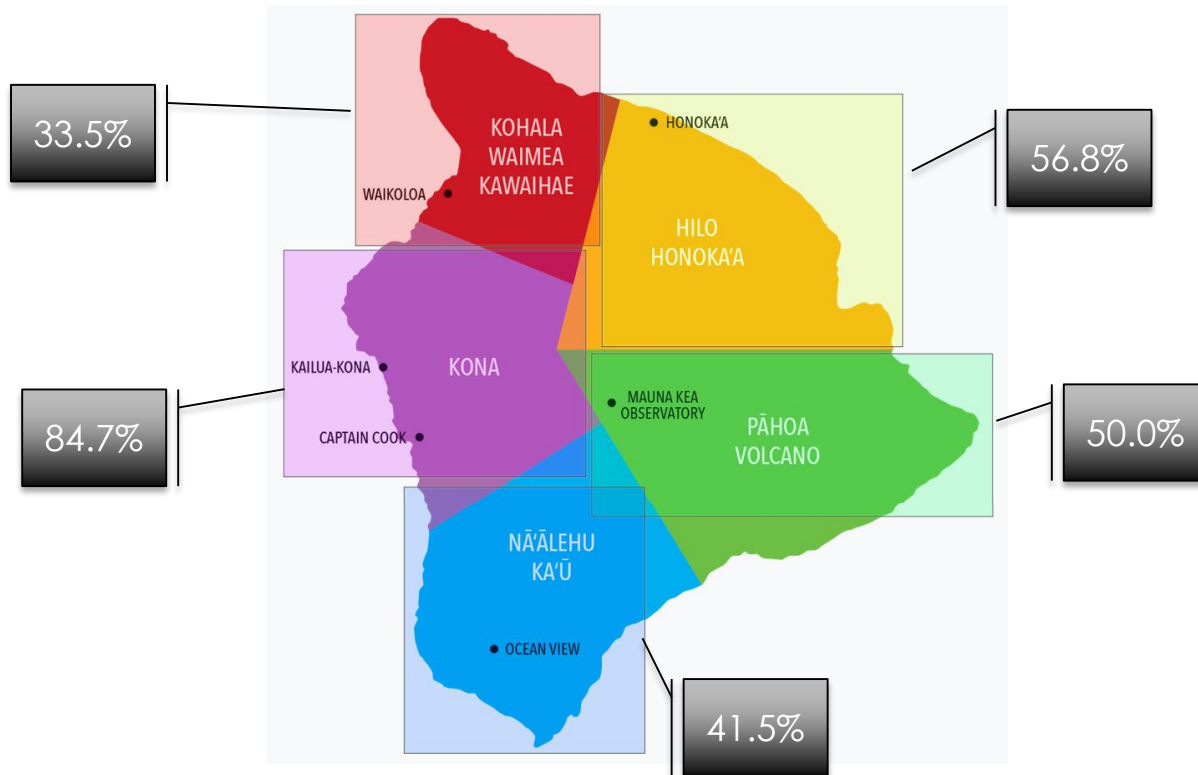
AREAS VISITED CANADA



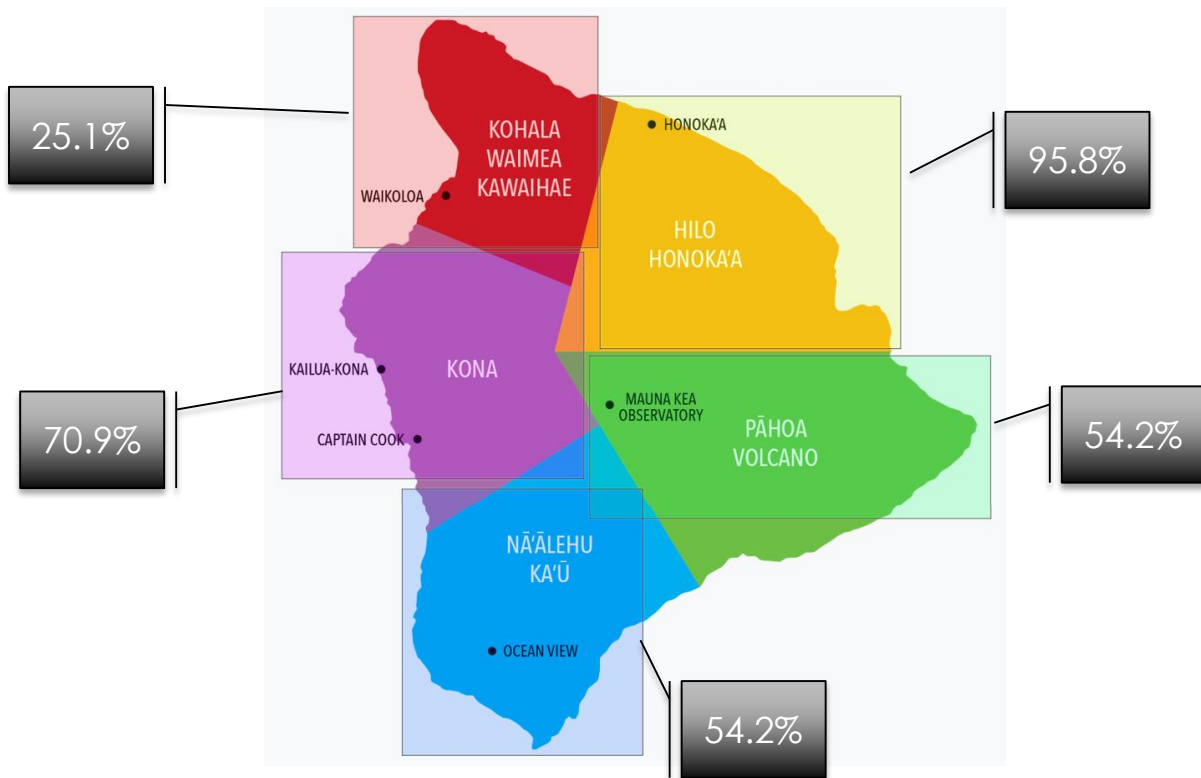
AREAS VISITED EUROPE



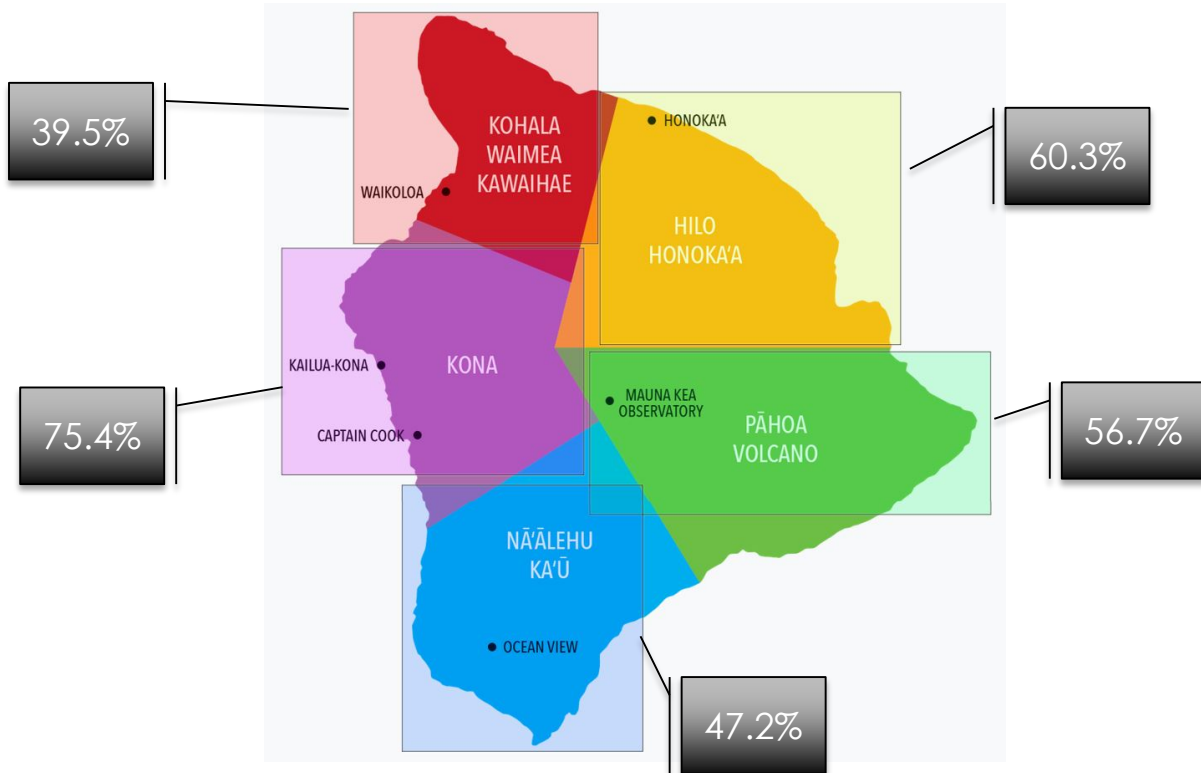
AREAS VISITED OCEANIA



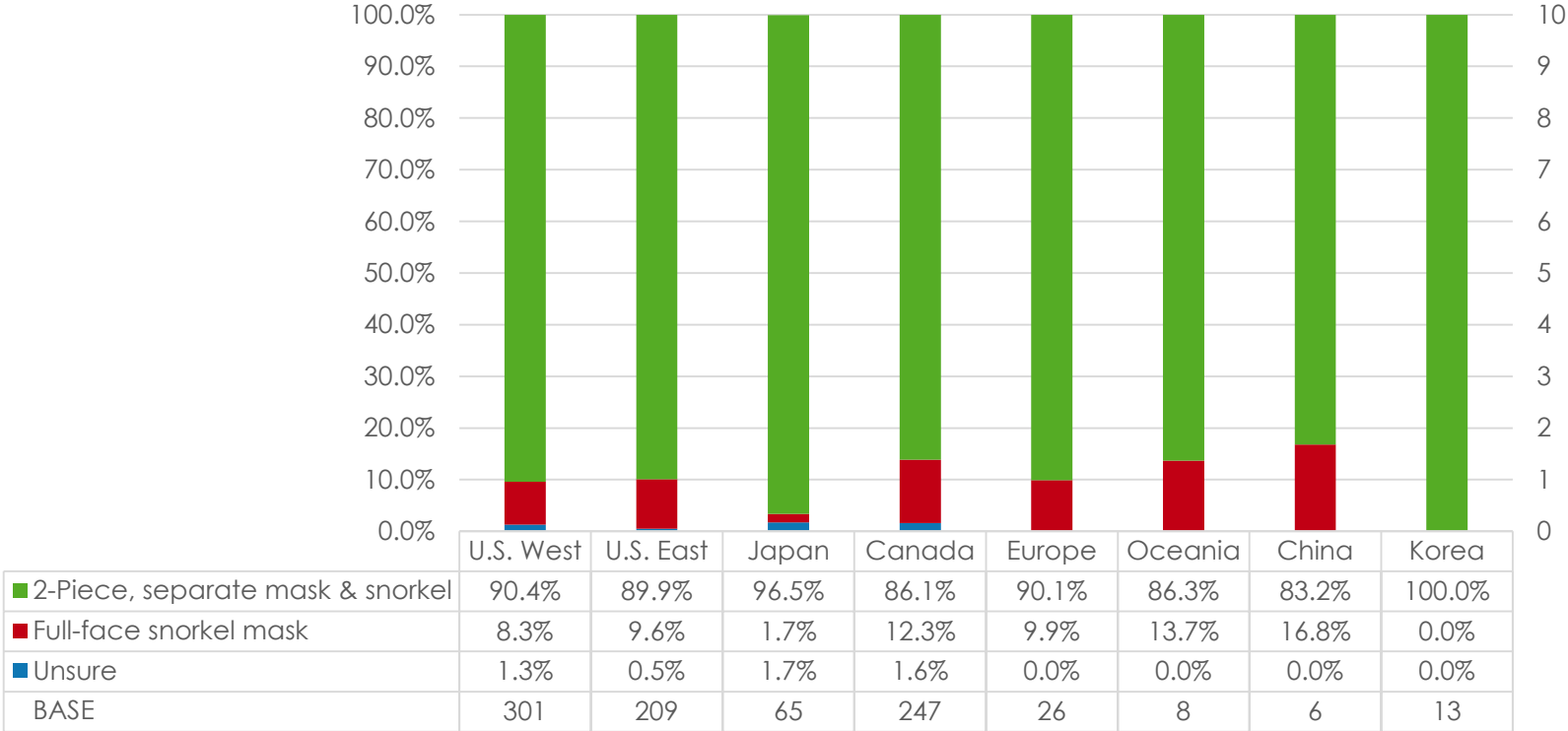
AREAS VISITED CHINA



AREAS VISITED KOREA



SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I

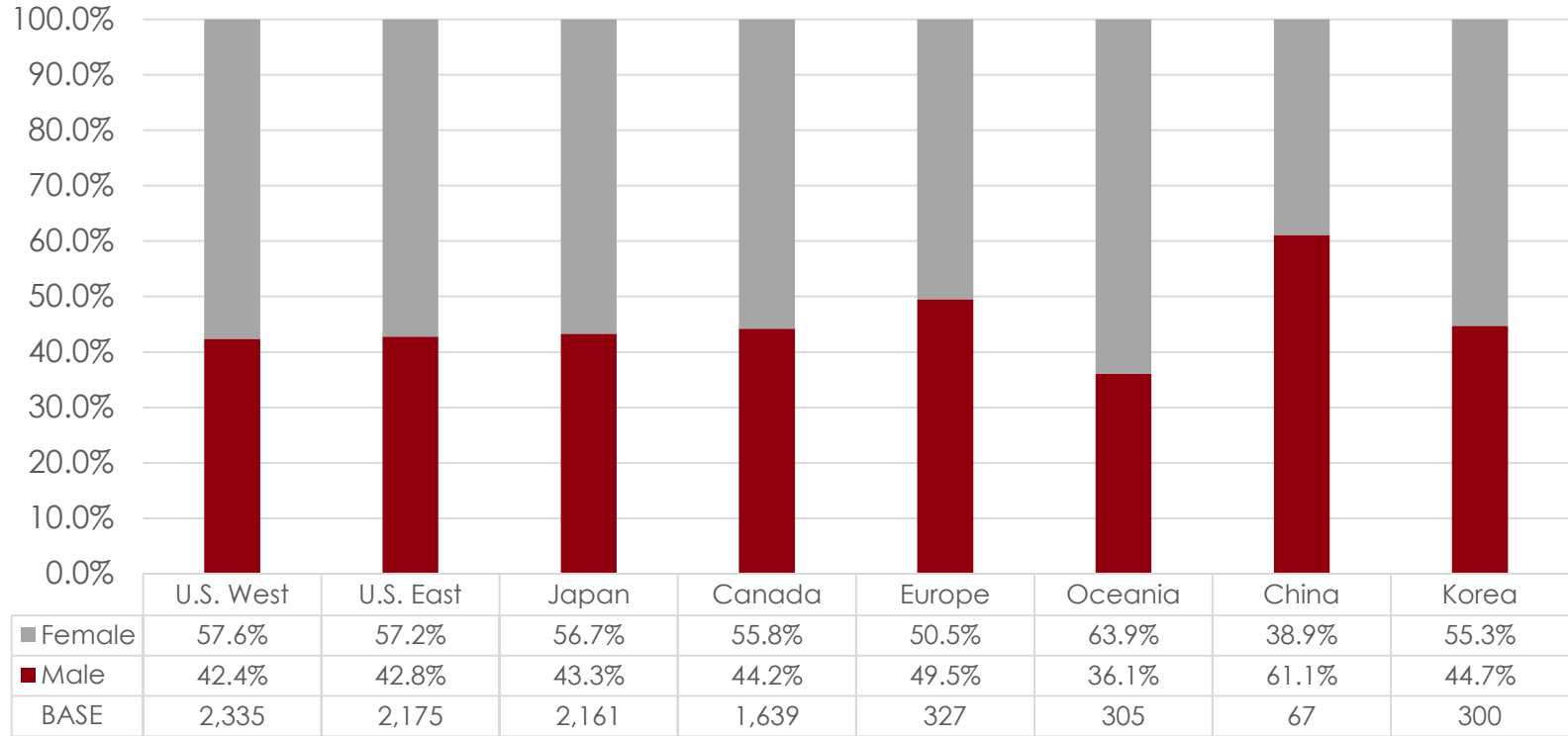


SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

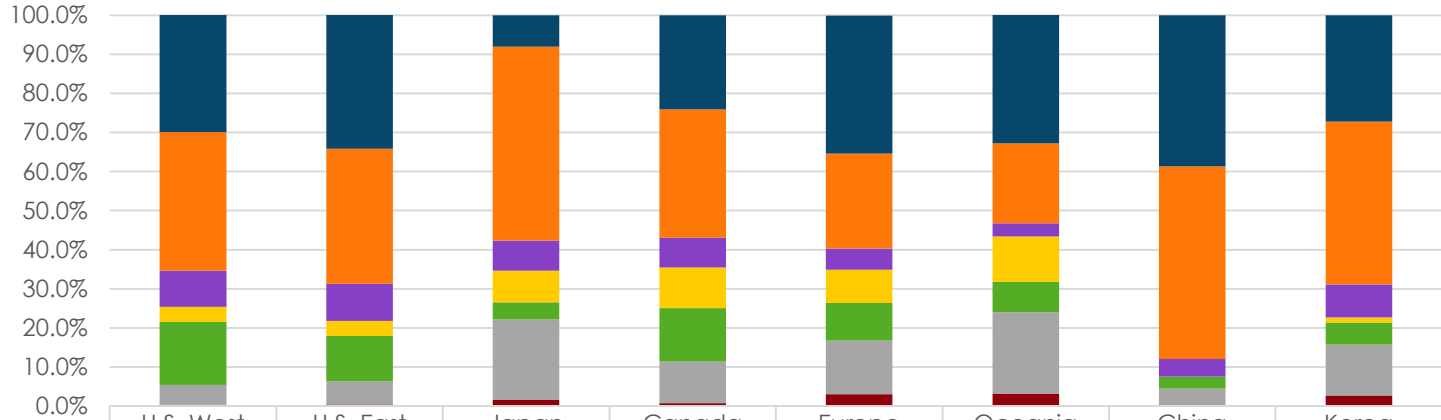
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Did not have to be assisted or rescued	98.0%	98.1%	98.3%	99.2%	96.7%	100.0%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	1.7%	0.9%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%
Yes, needed assistance – using full-face mask	0.0%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, needed assistance – other ocean activity	0.3%	0.5%	1.7%	0.4%	0.0%	0.0%	0.0%	0.0%
BASE	301	209	65	247	26	8	6	13

SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Post-Graduate	30.0%	34.3%	8.0%	24.1%	35.3%	32.9%	38.7%	27.2%
■ College Grad	35.5%	34.5%	49.7%	32.8%	24.3%	20.4%	49.3%	41.7%
■ Associate Degree	9.2%	9.5%	7.7%	7.6%	5.4%	3.4%	4.5%	8.4%
■ Vocational/ Tech	3.9%	3.9%	8.1%	10.4%	8.5%	11.6%	0.0%	1.3%
■ Some College	16.1%	11.6%	4.3%	13.7%	9.6%	7.8%	3.0%	5.7%
■ H.S. Grad	5.1%	5.9%	20.6%	10.7%	13.8%	20.8%	4.5%	13.0%
■ Some / No H.S.	0.3%	0.4%	1.6%	0.7%	3.0%	3.2%	0.0%	2.7%
BASE	2,331	2,173	2,159	1,636	325	303	67	300

VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	6.0%	5.3%	5.7%	13.7%	6.1%
\$40,000 to \$59,999	7.7%	7.4%	9.1%	18.5%	8.7%
\$60,000 to \$79,999	10.5%	10.2%	10.9%	11.4%	12.4%
\$80,000 to \$99,999	10.0%	12.2%	13.6%	11.2%	10.8%
\$100,000 to \$124,999	15.0%	14.6%	15.0%	11.8%	13.2%
\$125,000 to \$149,999	12.1%	11.7%	12.3%	8.9%	13.7%
\$150,000 to \$174,999	9.8%	8.7%	8.6%	6.1%	9.9%
\$175,000 to \$199,999	6.4%	5.1%	6.5%	3.1%	8.0%
\$200,000 to \$249,999	8.9%	9.1%	7.9%	5.3%	5.6%
\$250,000 +	13.6%	15.7%	10.4%	10.1%	11.7%

VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	23.3%
¥3.5 - ¥4.5 million	12.8%
¥4.5 - ¥5.5 million	10.0%
¥5.5 - ¥6.5 million	7.5%
¥6.5 - ¥7.5 million	5.2%
¥7.5 - ¥8.5 million	9.2%
¥8.5 - ¥10.0 million	9.5%
¥10.0 - ¥15.0 million	13.1%
¥15.0 - ¥20.0 million	3.9%
¥20.0 million +	5.5%

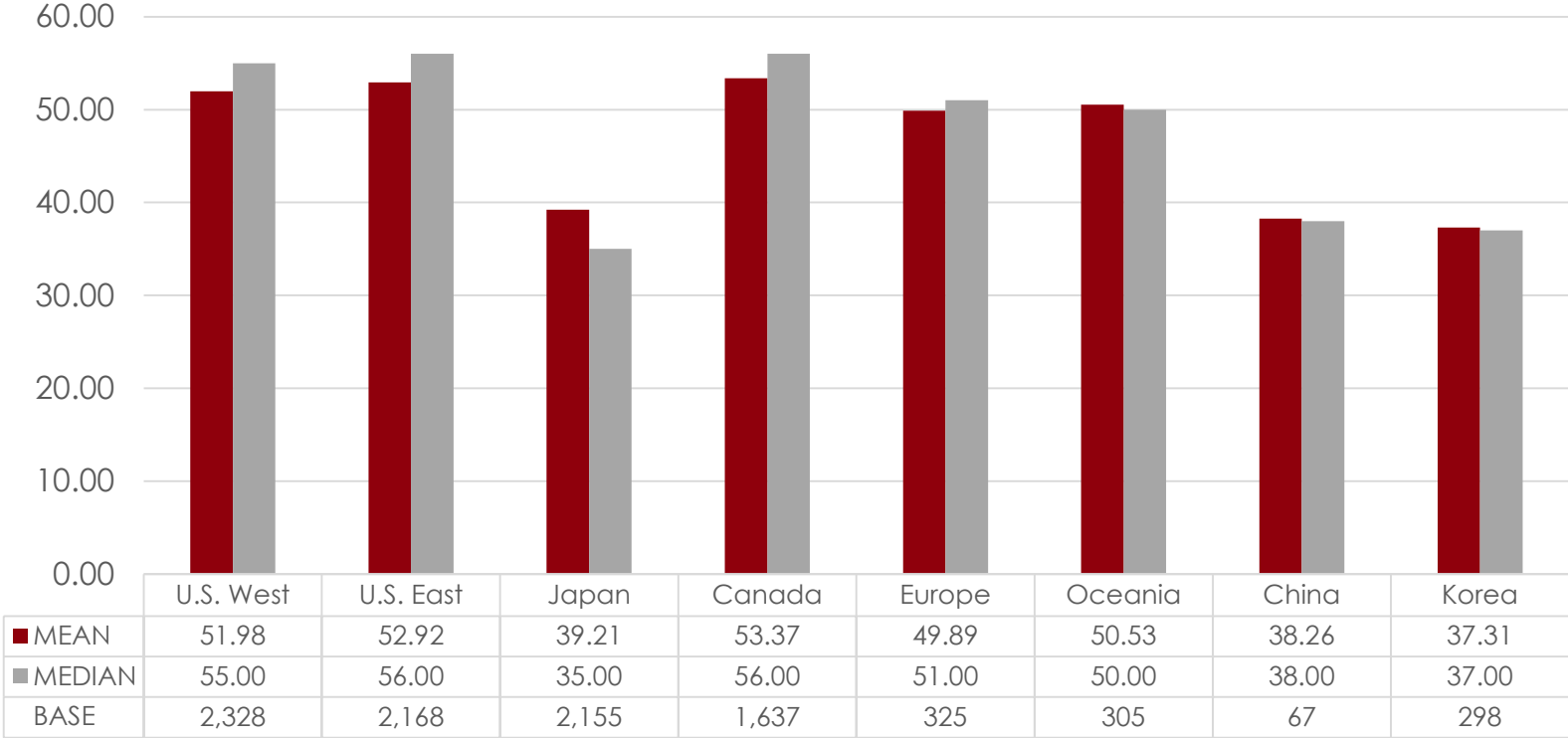
VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	10.2%
₩16,305,000-21,171,999	7.3%
₩27,174,000-38,041,999	8.4%
₩38,044,000-48,911,999	11.7%
₩48,912,000-59,781,999	11.0%
₩59,782,000-70,652,999	12.8%
₩70,653,000-81,520,999	6.9%
₩81,521,000-92,390,999	6.9%
₩92,391,000-103,259,999	6.2%
₩103,260,000+	18.6%

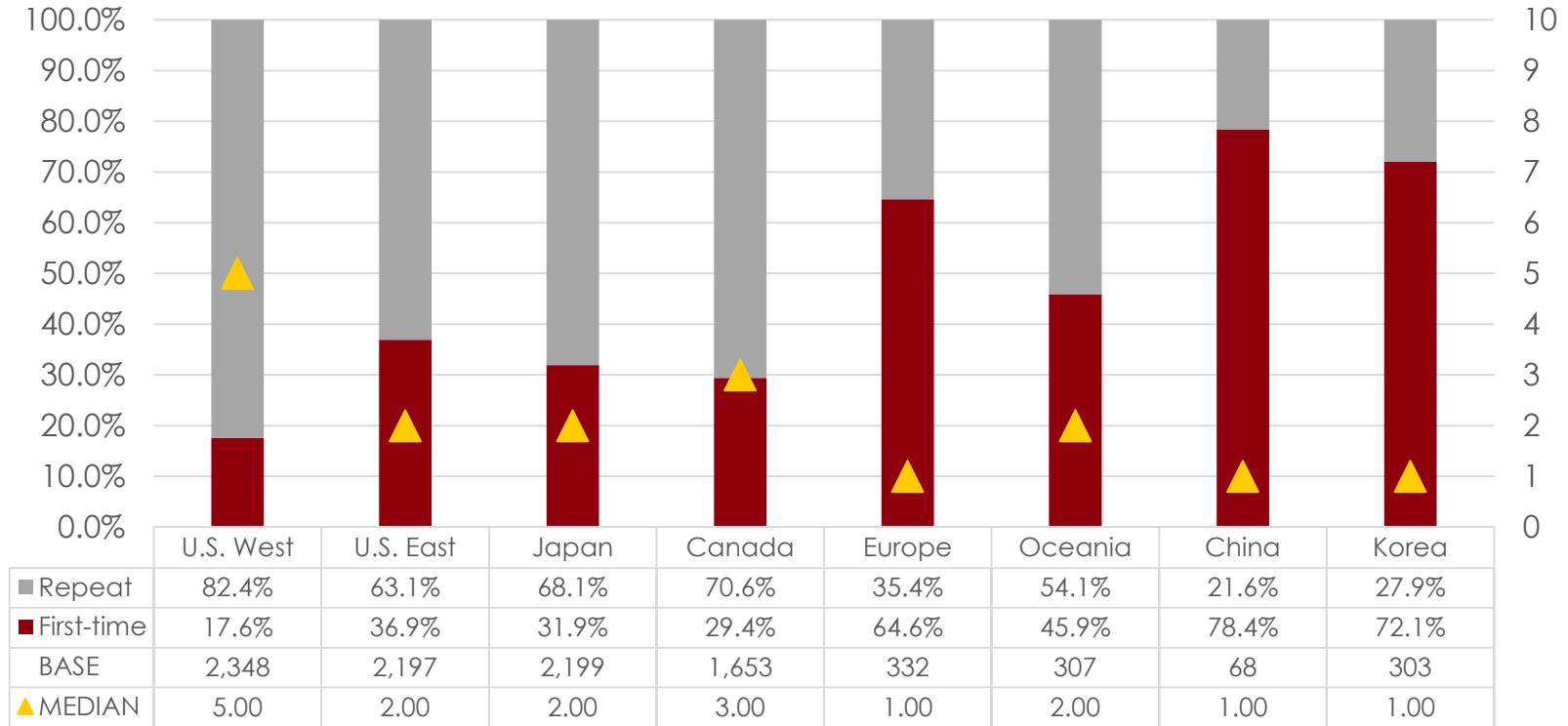
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	13.9%
¥250,800 - ¥376,099	24.6%
¥376,100 - ¥501,399	13.8%
¥501,400 - ¥626,799	9.2%
¥626,800 - ¥783,499	12.3%
¥783,500 - ¥940,199	7.7%
¥940,200 - ¥1,096,899	4.6%
¥1,096,900 - ¥1,253,599	0.0%
¥1,253,600 - ¥1,560,799	4.6%
¥1,560,800+	9.2%

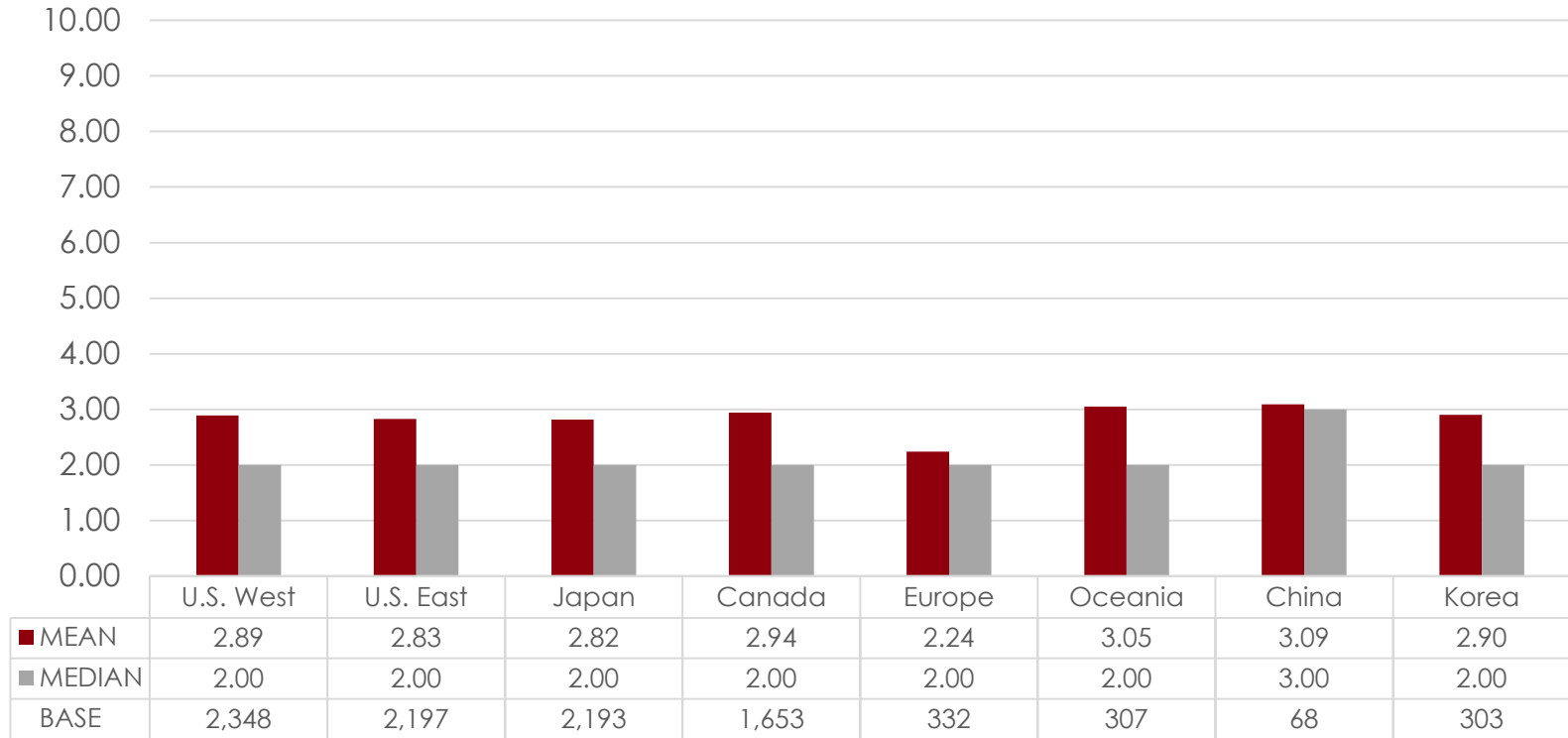
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAI‘I



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Spouse	60.0%	61.9%	46.5%	66.5%	49.2%	57.5%	54.5%	55.8%
Other adult family	25.2%	25.3%	24.5%	27.3%	17.3%	29.8%	32.3%	34.6%
Friend/ Associate	18.8%	17.2%	29.9%	17.8%	18.6%	11.8%	19.1%	9.9%
Child <18	17.5%	12.5%	10.4%	17.9%	6.7%	27.1%	25.1%	18.8%
Alone	9.9%	11.0%	4.9%	6.2%	14.1%	9.9%	5.9%	4.6%
Girlfriend/ boyfriend	7.5%	5.8%	3.9%	7.0%	10.2%	5.9%	7.3%	0.3%
Same-sex partner	1.1%	1.2%	0.2%	0.9%	1.9%	0.6%	0.0%	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	915	3.24
US East	1,312	2.71
Japan	1,903	2.25
Canada	709	3.68
Europe	211	6.75
Oceania	296	5.70
China	62	12.45
Korea	287	5.78
All MMAs	5,695	1.30

*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	435	4.70
US East	451	4.61
Japan	13	27.18
Canada	262	6.05
Europe	47	14.29
Oceania	26	19.22
China	1	98.00
Korea	10	30.99
All MMAs	1,245	2.78

*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	651	3.84
US East	794	3.48
Japan	34	16.81
Canada	561	4.14
Europe	140	8.28
Oceania	34	16.81
China	12	28.29
Korea	41	15.31
All MMAs	2,267	2.06

*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	686	3.74
US East	704	3.69
Japan	407	4.86
Canada	493	4.41
Europe	107	9.47
Oceania	34	16.81
China	25	19.60
Korea	63	12.35
All MMAs	2,519	1.95

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