

**2005**

**Visitor Satisfaction  
& Activity Report**



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

2005 VISITOR SATISFACTION AND  
ACTIVITY REPORT

This report has been cataloged as follows:

Hawaii. Dept. of Business, Economic Development and Tourism. Research and Economic Analysis Division. Tourism Research Branch  
2005 visitor satisfaction and activity report. Honolulu: 2006.

v, 115 p.

1. Tourism – Public opinion – Hawaii.  
G155.H3.V753.2005

# TABLE OF CONTENTS

1. INTRODUCTION	1
Background	2
Objectives	2
Definitions	3
2. OVERALL TRENDS	4
Visitor Satisfaction Ratings	5
Trip Planning	17
3. SATISFACTION AND RATING BY DESTINATION	20
4. EXPERIENCE AND WILLINGNESS TO RECOMMEND OR REVISIT	47
Individual Island Experience	48
Overall Rating of Most Recent Vacation to Hawaii	48
Expectations	48
Likelihood to Recommend Hawaii	49
Likelihood to Revisit Hawaii	50
5. ACTIVITY PARTICIPATION	61
6. TRIP PLANNING	76
Trip Planning and Booking Timetable	77
Island Visitation Decision Timetable	79
Sources of Information Used to Plan Trip	79
Internet Use	79
Use of Travel Agent	80
7. SAFETY ISSUES AND OTHER NUISANCES	85
8. VISITOR PROFILE	89
Lifestyle/Lifestage Segments and Visitation Status	90
Employment, Income and Education	90
Other Visitor Characteristics	92
Primary Purpose of Trips	93
Secondary Purpose of Trips	94
Travel Companions	95
9. DEFINITIONS AND SURVEY METHODOLOGY	104
Definitions	105
Survey Methodology	106
10. 2005 VISITOR SATISFACTION SURVEY FORM (English Version)	107

## LIST OF TABLES

Table 3.1.1	Oahu Detailed Satisfaction Ratings by Category – U.S. Total	24
Table 3.1.2	Maui Detailed Satisfaction Ratings by Category – U.S. Total	25
Table 3.1.3	Kauai Detailed Satisfaction Ratings by Category – U.S. Total	26
Table 3.1.4	Kona Detailed Satisfaction Ratings by Category – U.S. Total	27
Table 3.2.1	Oahu Detailed Satisfaction Ratings by Category – U.S. West	28
Table 3.2.2	Maui Detailed Satisfaction Ratings by Category – U.S. West	29
Table 3.2.3	Kauai Detailed Satisfaction Ratings by Category – U.S. West	30
Table 3.2.4	Kona Detailed Satisfaction Ratings by Category – U.S. West	31
Table 3.3.1	Oahu Detailed Satisfaction Ratings by Category – U.S. East	32
Table 3.3.2	Maui Detailed Satisfaction Ratings by Category – U.S. East	33
Table 3.3.3	Kauai Detailed Satisfaction Ratings by Category – U.S. East	34
Table 3.3.4	Kona Detailed Satisfaction Ratings by Category – U.S. East	35
Table 3.4.1	Oahu Detailed Satisfaction Ratings by Category – Japan	36
Table 3.4.2	Maui Detailed Satisfaction Ratings by Category – Japan	37
Table 3.4.3	Kona Detailed Satisfaction Ratings by Category – Japan	38
Table 3.5.1	Oahu Detailed Satisfaction Ratings by Category – Canada	39
Table 3.5.2	Maui Detailed Satisfaction Ratings by Category – Canada	40
Table 3.5.3	Kauai Detailed Satisfaction Ratings by Category – Canada	41
Table 3.5.4	Kona Detailed Satisfaction Ratings by Category – Canada	42
Table 3.6.1	Oahu Detailed Satisfaction Ratings by Category – Europe	43
Table 3.6.2	Maui Detailed Satisfaction Ratings by Category – Europe	44
Table 3.6.3	Kauai Detailed Satisfaction Ratings by Category – Europe	45
Table 3.6.4	Kona Detailed Satisfaction Ratings by Category – Europe	46
Table 4.1	Overall Island Experience	51
Table 4.2	Overall Rating of Most Recent Vacation to Hawaii	52
Table 4.2.1	Overall Rating of Most Recent Vacation to Hawaii by Lifestage	52
Table 4.3	Expectations of Vacation	53
Table 4.3.1	Expectations of Vacation by Lifestage	53
Table 4.4	Likelihood to Recommend Hawaii as a Vacation Place	54
Table 4.5	Likelihood to Recommend Hawaii by Lifestage – U.S. Total	54
Table 4.6	Likelihood to Recommend Hawaii by Lifestage – U.S. West	54
Table 4.7	Likelihood to Recommend Hawaii by Lifestage – U.S. East	55
Table 4.8	Likelihood to Recommend Hawaii by Lifestage – Japan	55
Table 4.9	Likelihood to Recommend Hawaii by Lifestage– Canada	56
Table 4.10	Likelihood to Recommend Hawaii by Lifestage– Europe	56
Table 4.11	Likelihood to Revisit Hawaii in the Next 5 Years	57
Table 4.12	Reasons for Not Revisiting Hawaii	57
Table 4.13	Likelihood to Revisit Hawaii in the Next 5 Years – U.S. Total	57
Table 4.14	Likelihood to Revisit Hawaii in the Next 5 Years – U.S. West	58
Table 4.15	Likelihood to Revisit Hawaii in the Next 5 Years – U.S. East	58
Table 4.16	Likelihood to Revisit Hawaii in the Next 5 Years – Japan	59
Table 4.17	Likelihood to Revisit Hawaii in the Next 5 Years – Canada	59
Table 4.18	Likelihood to Revisit Hawaii in the Next 5 Years – Europe	60

Table 5.1	Activity Participation – U.S. Total	64
Table 5.2	Activity Participation – U.S. West	65
Table 5.3	Activity Participation – U.S. East	66
Table 5.4	Activity Participation – Japan	67
Table 5.5	Activity Participation – Canada	68
Table 5.6	Activity Participation – Europe	69
Table 5.7	Activity Participation by Lifestage – U.S. Total	70
Table 5.8	Activity Participation by Lifestage – U.S. West	71
Table 5.9	Activity Participation by Lifestage – U.S. East	72
Table 5.10	Activity Participation by Lifestage – Japan	73
Table 5.11	Activity Participation by Lifestage – Canada	74
Table 5.12	Activity Participation by Lifestage – Europe	75
Table 6.1	Trip Planning & Booking Timetable – U.S. Total	81
Table 6.2	Trip Planning & Booking Timetable – U.S. West	81
Table 6.3	Trip Planning & Booking Timetable – U.S. East	81
Table 6.4	Trip Planning & Booking Timetable – Japan	82
Table 6.5	Trip Planning & Booking Timetable – Canada	82
Table 6.6	Trip Planning & Booking Timetable – Europe	82
Table 6.7	Island Visitation Decision Timetable	83
Table 6.8	Sources of Information Used for Trip Planning	83
Table 6.9	Internet Usage for Trip Planning	84
Table 6.10	Usage of Travel Agent by MMA	84
Table 7.1	Issues and Other Nuisance	86
Table 7.2	Issues and Other Nuisance – U.S. Total	86
Table 7.3	Issues and Other Nuisance – U.S. West	87
Table 7.4	Issues and Other Nuisance – U.S. East	87
Table 7.5	Issues and Other Nuisance – Japanese	87
Table 7.6	Issues and Other Nuisance – Canada	88
Table 7.7	Issues and Other Nuisance – Europe	88
Table 8.1	Lifestyle/Lifestage and Visitation Status	96
Table 8.2.1	Income Level – U.S. Total	96
Table 8.2.2	Income Level – U.S. West	97
Table 8.2.3	Income Level – U.S. East	97
Table 8.2.4	Income Level – Japan	98
Table 8.2.5	Income Level – Canada	98
Table 8.2.6	Income Level – Europe	99
Table 8.3	Employment	99
Table 8.4	Education	99
Table 8.5	Gender and Age	100
Table 8.6	Relationship with Hawaii	100
Table 8.7	Accommodation Usage by Island	101
Table 8.8	Travel History	102
Table 8.9	Places visited in the Past Five Years	102
Table 8.10	Primary Purpose of Trip	103

Table 8.11	Secondary Purpose of Trip	103
Table 8.12	Companion Type	103

## LIST OF FIGURES

Figure 1: Overall Rating of Trip Was Excellent	5
Figure 2: Trip Exceeds Expectations	6
Figure 3: Overall Satisfaction	7
Figure 4: Overall Dissatisfaction	8
Figure 5: Very Likely to Recommend Hawaii to Friends and Relatives	9
Figure 6: Very Likely to Revisit Hawaii in Next Five Years	10
Figure 7: First-Time Visitors Very Likely to Revisit Hawaii in Next Five Years	11
Figure 8: Repeat Visitors Very Likely to Revisit Hawaii in Next Five Years	11
Figure 9: Not Likely At All to Revisit Hawaii in Next Five Years	12
Figure 10: Reasons for Not Revisiting Hawaii - U.S.	13
Figure 11: Reason for Not Revisiting Hawaii - Japan	13
Figure 12: Island Experience Rated as Excellent – U.S.	14
Figure 13: Island Experience Rated as Excellent – Japan	15
Figure 14: Island Experience Rated as Excellent – Canada	15
Figure 15: Island Experience Rated as Excellent – Europe	16
Figure 16: Sources of Information - U.S. Total	17
Figure 17: Sources of Information - Japan	18
Figure 18: Internet Use - U.S.	19
Figure 19: Internet Use - Japan	19

## ABOUT THIS REPORT

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

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

The report is also available in Adobe Acrobat form on the DBEDT Web Site, <http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>.

Due to the space limitations, additional data tables were not included in this report but can be found on the DBEDT website.

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

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



# 1. INTRODUCTION

# INTRODUCTION

## Background

The Visitor Satisfaction Survey was initiated by the Hawaii Visitors and Convention Bureau (HVCB, formerly known as the Hawaii Visitors Bureau) in the 1950s. The survey has been conducted intermittently since that time and reports were published by HVCB for 1961, 1969-1977, 1984-1992, 1996 and 1998, focusing on visitors from U.S. and Japan. In January 1999 the Legislature transferred the responsibility for visitor-related research projects from HVCB to the Department of Business, Economic Development and Tourism (DBEDT). DBEDT began conducting the Visitor Satisfaction survey in 2001. Then in 2002, DBEDT expanded the study to include Canadian and European visitors.

The survey measures satisfaction levels for different components of the visitor experience (accommodations, attractions, dining, shopping, etc.) and also provides data on what activities visitors engaged in during their vacation. In this report, DBEDT presents results from the 2005 Visitor Satisfaction Survey. For the first time, the report includes detailed satisfaction results by island. Results from past Visitor Satisfaction Surveys and other visitor research publications are available on the DBEDT website:  
<http://www.hawaii.gov/dbedt/info/visitor-stats/vsat>.

## Objectives

There are three main objectives of this report. The first objective is to present measurements of survey respondents' satisfaction with Hawaii as a visitor destination, specifically visitors from the top five major market areas, U.S. West, U.S. East, Japan, Canada and Europe. This report attempts to portray the visitor's overall evaluation of the vacation experience covering various aspects of their trip to the islands for the island that they stayed the longest. These visitors were queried about their experiences with Hawaii's accommodations, restaurants, airports, parks, beaches and attractions, as well as their engagement in activities such as sightseeing, shopping, transportation, cultural, entertainment and sports and fitness. It is hoped that this feedback will help Hawaii's businesses take proactive measures in promotion, maintenance and improvement in these essential areas. Sectors of industries may also use these data to assess their performance. The change to present detailed satisfaction information by island was made to improve feedback to Hawaii's visitor industry.

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

The final objective is to analyze demographic information on visitors who responded to the study. This level of detail is not available from the DBEDT Annual and Monthly visitor

reports. Information is provided on the average visitor's income level, employment status and education level. Furthermore, visitors are classified into lifestyle or life-stage segments as well as first-time or repeat visitors to highlight the different types of travelers to the islands. Information on their purpose of trip and their travel companions helps to complete the picture of the Hawaii visitors.

## Definitions

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

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

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

### Visitor Lifestyle and Life-Stage:

- Wedding/Honeymoon visitors: Visitors whose primary and secondary purpose of trip are getting married or to honeymoon.
- Family: Visitors traveling with kids under 18 years of age and are not in the above life stage.
- Young: Visitors between 18 and 34 years of age and are not in the above life stages.
- Middle Age: Visitors between 35 and 54 years of age and are not in the above life stages.
- Seniors: Visitors 55 years of age or over and are not in the above life stages.

## 2. OVERALL TRENDS

# OVERALL TRENDS

## Visitor Satisfaction Ratings

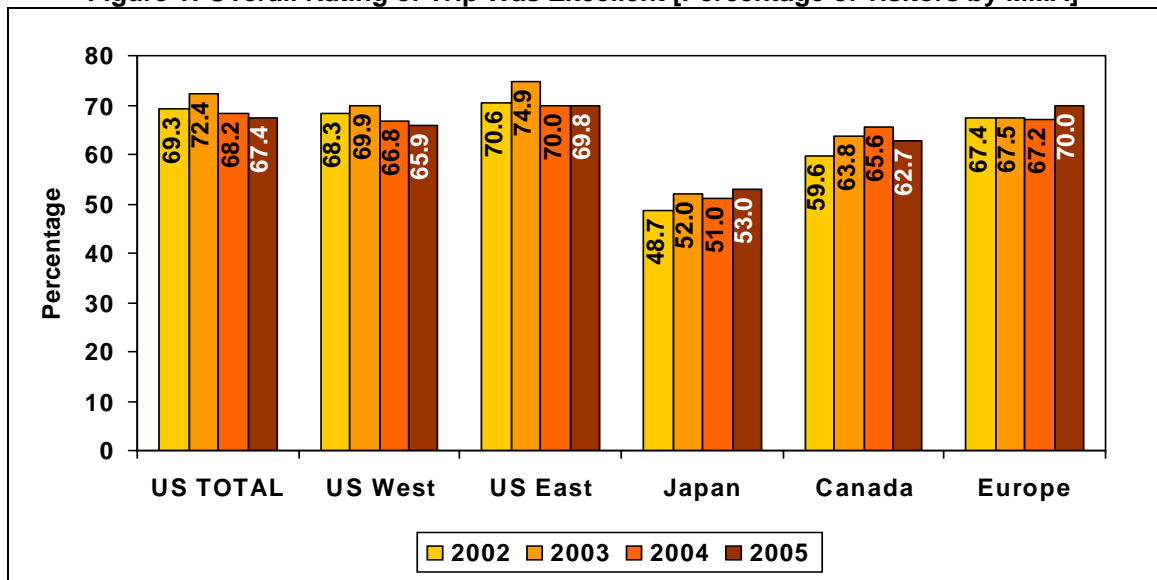
Visitor satisfaction is an important indicator of industry performance. This measure provides vital feedback on how well services are delivered and how well the industry meets expectations. High satisfaction is also a leading-indicator of customer retention and loyalty. Satisfying visitors’ needs and expectations encourages return trips to Hawaii. Satisfied customers also develop a fondness for the destination which results in a higher likelihood to recommend Hawaii to others.

### Overall Rating of Most Recent Vacation to Hawaii

Visitors continue to give high marks for their overall experience in Hawaii. The majority of visitors rate their most recent trip to Hawaii as excellent.

- Approximately two-thirds (67.4%) of U.S. visitors found their most recent trip excellent. Since reaching a high of 72.4 percent in 2003, the rating from U.S. visitors indicates a slight decline in satisfaction.
- U.S. West visitors tend to rate Hawaii lower than their U.S. East counterparts. In 2005 U.S. West repeat visitors rated Hawaii lower (65.1%) than first-timers (69.0%); see Chapter 4, Table 4.2.1. Therefore a rise in repeat visitors from U.S. West might exacerbate the declining ratings.
- Japanese visitors are less inclined to give a top rating, still – 53 percent of the visitors said their trip was excellent. Over the past four years the percentage of visitors who have found Hawaii excellent has risen slightly from a low in 2002 of 48.7 percent to 53 percent in 2005.
- Nearly 63 percent of Canadian visitors rated Hawaii as excellent.
- Approximately seven out of every ten European visitors over the past four years have found their trip excellent.

**Figure 1: Overall Rating of Trip Was Excellent [Percentage of visitors by MMA]**

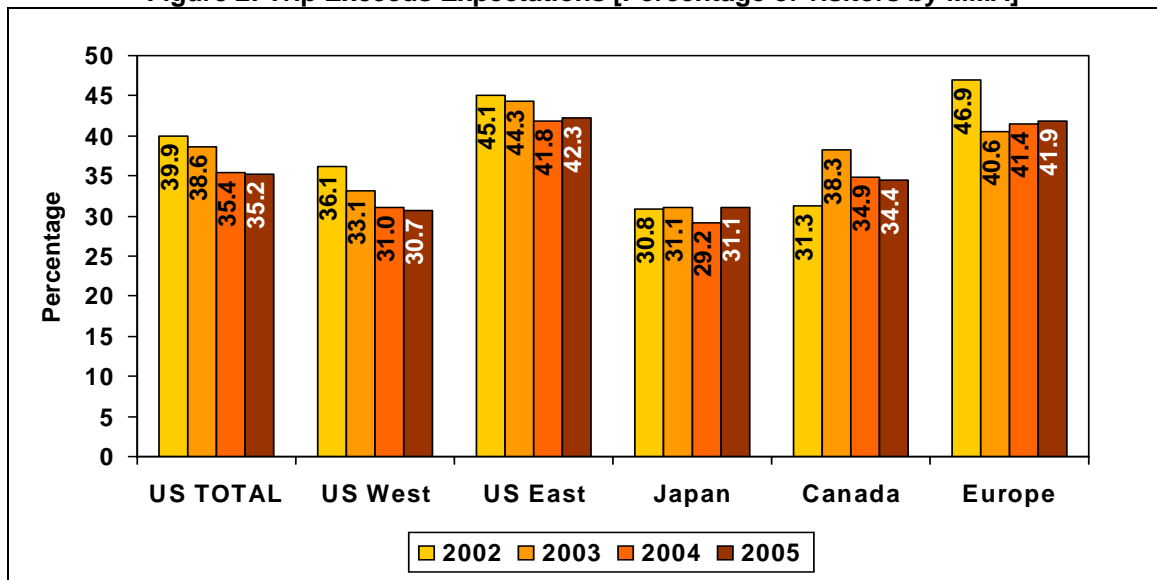


## Expectations

The visitors' evaluation of the trip is influenced not only by the attributes and characteristics of the service but also by the needs, motivations and interests of the visitors. Therefore it is important to measure how well the destination was able to provide the experience that was expected. The measure also reflects how well Hawaii's marketing corresponds with the actual experience. While satisfaction has been high, expectations are also set high because many visitors have been to Hawaii and know what to expect. Therefore a better indicator of a high quality experience, over the long run, would be how well Hawaii exceeds visitor expectations. Overall, this indicator shows that Hawaii's ability to exceed expectations is quite strong. Additional data also shows that very few visitors (less than three percent) feel Hawaii did not meet their expectations at all.

- U.S. East and European visitors rated Hawaii the highest for exceeding their expectations. Forty-two percent of these visitors felt that their trip to Hawaii exceeded their expectations.
- Approximately a third of Japanese and Canadian visitors continue to find their experiences exceed their expectations.
- Over the past few years, Hawaii found it more difficult to exceed the expectations of U.S. West visitors (30.7%). This decline could be a result of the increase in repeat visitors over the past few years. Familiarity with the product and the increasing availability of information has created better prepared U.S. West travelers who know exactly what to expect.

**Figure 2: Trip Exceeds Expectations [Percentage of visitors by MMA]**

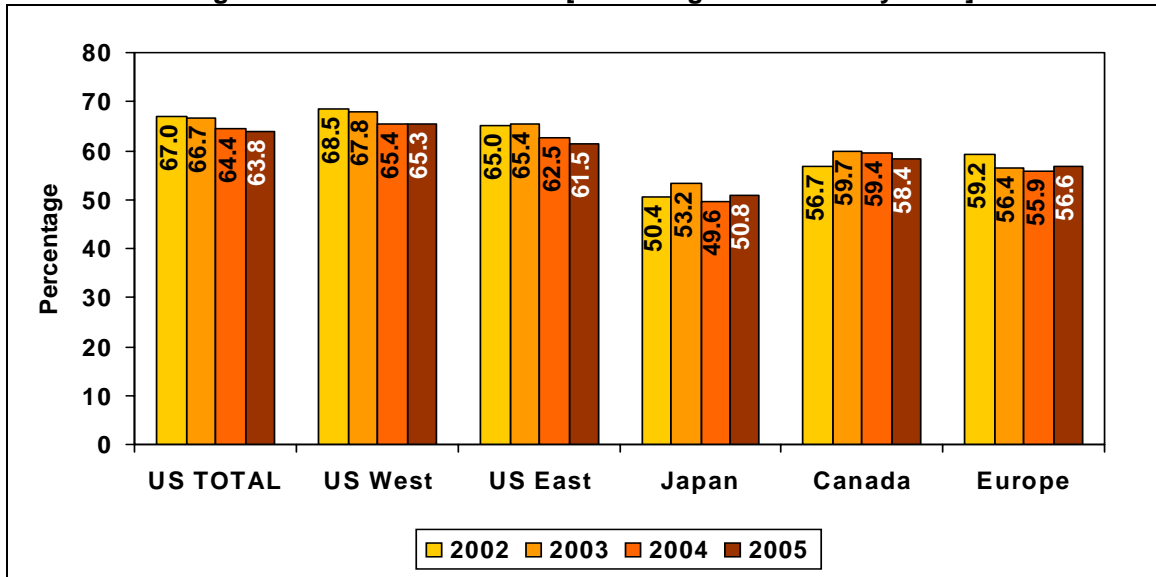


### Overall Satisfaction/Dissatisfaction

Taking into account all the facets of satisfaction helps to give us a better picture of the overall opinions of our visitors. This index of overall satisfaction is the average ratings of “excellent” for overall vacation, “exceeded” for trip expectations, “very likely” for likelihood to recommend Hawaii and “very likely” for likelihood to revisit, detailed in later sections. Ratings of “above average”, “met expectations” and “somewhat likely” were not included.

- U.S. visitors show a slight decline in overall satisfaction over the past few years but the majority of the visitors surveyed continued to be very satisfied with Hawaii.
- Overall satisfaction from the Japan market appears to fluctuate year to year but appears to stay within a certain range.
- Canadian and European visitors’ overall satisfaction have stabilized over the past three years.

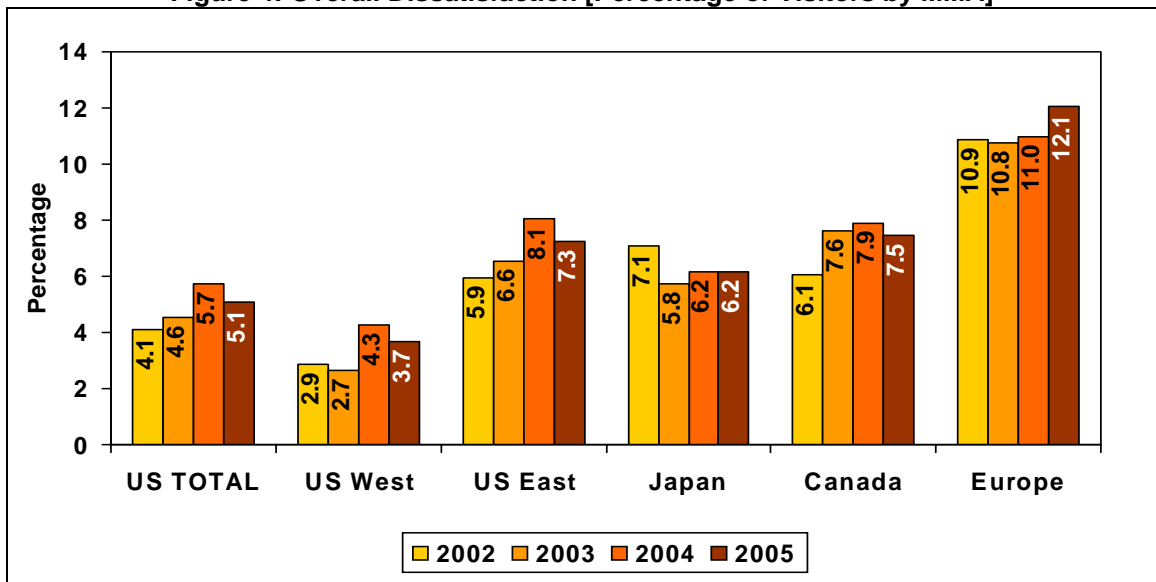
**Figure 3: Overall Satisfaction [Percentage of Visitors by MMA]**



While the majority of the visitors surveyed gave high marks for their experiences in Hawaii, the percentages of visitors dissatisfied with the islands remained quite low. This index of overall dissatisfaction is the average ratings of “below average” and “poor” for overall vacation, “did not meet” for trip expectations, “not too likely” and “not at all likely” for likelihood to recommend Hawaii and “not too likely” and “not at all likely” for likelihood to revisit.

- Except for a small increase from European visitors, overall dissatisfaction from U.S. West, U.S. East and Canadian respondents showed improvements (decline) in 2005.

**Figure 4: Overall Dissatisfaction [Percentage of Visitors by MMA]**



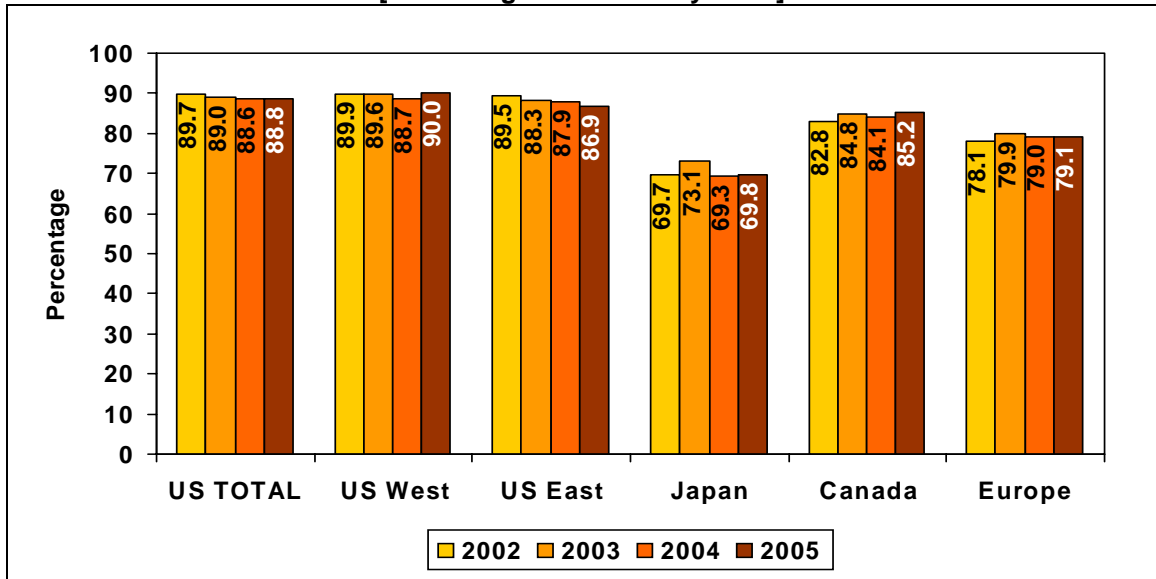


## Likelihood to Recommend Hawaii

When visitors are highly satisfied with their trip they will be more likely to recommend the destination to friends and family. Many Hawaii visitors report to be very likely to recommend this destination to others. Word-of-mouth advertising is important in marketing Hawaii. These referrals develop more first time visitors to Hawaii and encourage previous visitors to return.

- Almost all of the U.S. West visitors feel they will recommend Hawaii to others (average of 89.6 percent over past four years).
- The likelihood to recommend Hawaii to others has remained relatively stable over the past four years among the top four visitor markets.
- Even though slightly lower than other marketing areas, at least two-thirds of Japanese visitors have been very likely to recommend Hawaii over the past four years.

**Figure 5: Very Likely to Recommend Hawaii to Friends and Relatives  
[Percentage of visitors by MMA]**

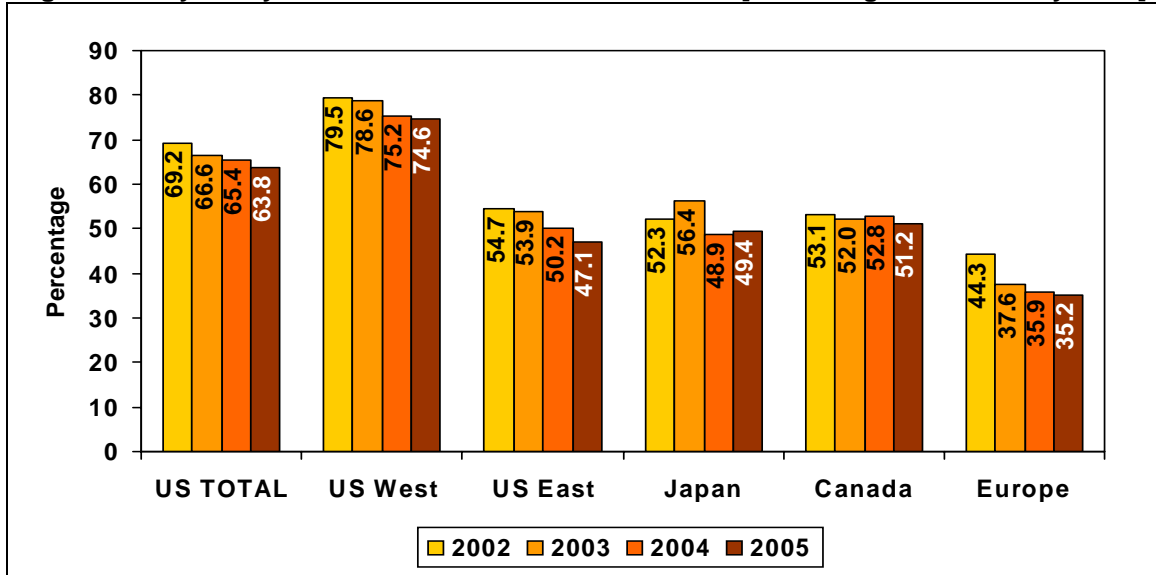


## Likelihood to Revisit Hawaii

Visitors appear to be satisfied with their vacations but their sentiments toward returning in the near future seems to be waning. Figure 6, shows that the percentage of visitors who were very likely to return to Hawaii in the next five years has been declining in most MMA. Only Canadian visitors appear to remain at a constant rate. The decline in desire to return is also a reflection of the destination's ability to exceed the expectations of the visitor. The challenge is converting visitors to be loyal visitors by continuously enhancing products and services that meet the needs of the visitor.

- The majority of U.S. West visitors are still very likely to return in the next five years but the rate has declined to 75 percent in 2005 from a high of 80 percent in 2002.
- Less than half of U.S. East visitors were very likely to return (47.1%) even though 55 percent were very likely to return only four years prior.
- Less than half of Japan visitors were also very likely to return but the drop off occurred two years ago and has remained constant since 2004.

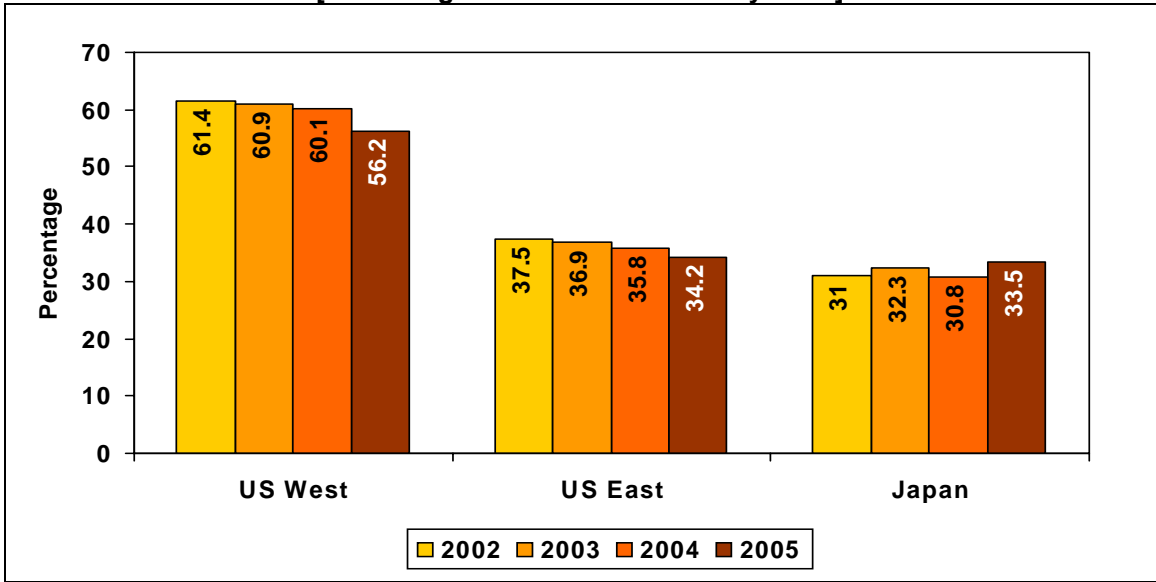
**Figure 6: Very Likely to Revisit Hawaii in Next Five Years [Percentage of visitors by MMA]**



Since likelihood to revisit is also highly correlated with visitation status (first-time or repeat visitor) and the ratio of first-time to repeat visitors varies across MMA and time, a fitting representation is to analyze the first-time and repeat visitors separately.

- Only one-third of first-time visitors from U.S. East or Japan were very likely to return in the next five years compared to over half of U.S. West visitors.
- In 2005, a lower proportion of first-time visitors from U.S. West were very likely to revisit Hawaii than in previous years.
- An incredible 80 percent of U.S. West repeat visitors are very likely to return to Hawaii in the next five years, virtually unchanged from the previous year.
- Repeat visitors, in 2005, saw a decline in the number of U.S. East visitors who were very likely to return.

**Figure 7: First-Time Visitors Very Likely to Revisit Hawaii in Next Five Years  
[Percentage of first-time visitors by MMA]**



**Figure 8: Repeat Visitors Very Likely to Revisit Hawaii in Next Five Years  
[Percentage of repeat visitors by MMA]**

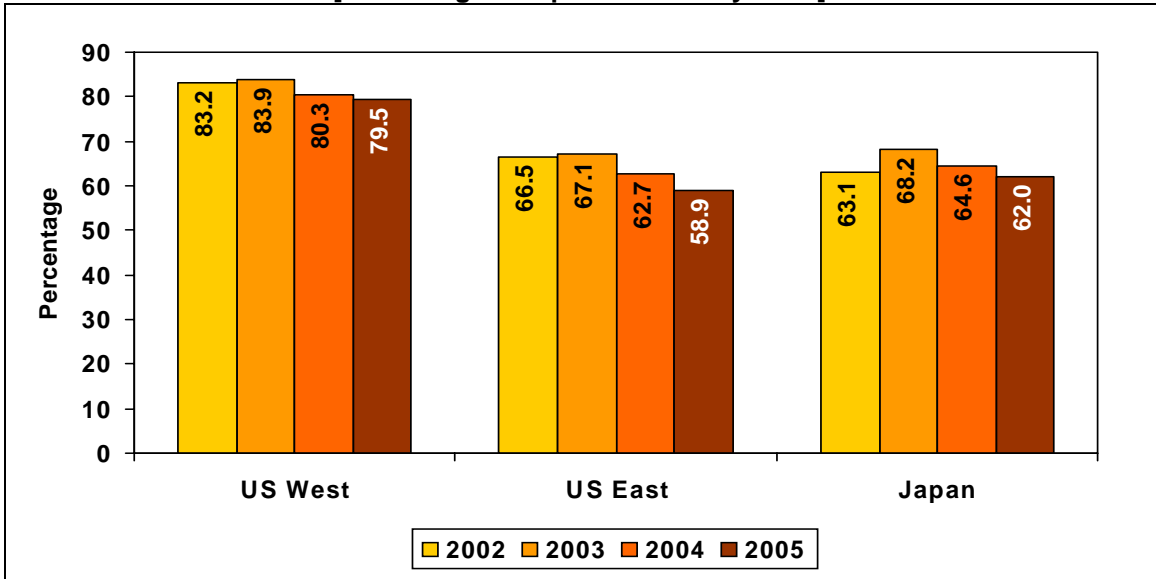
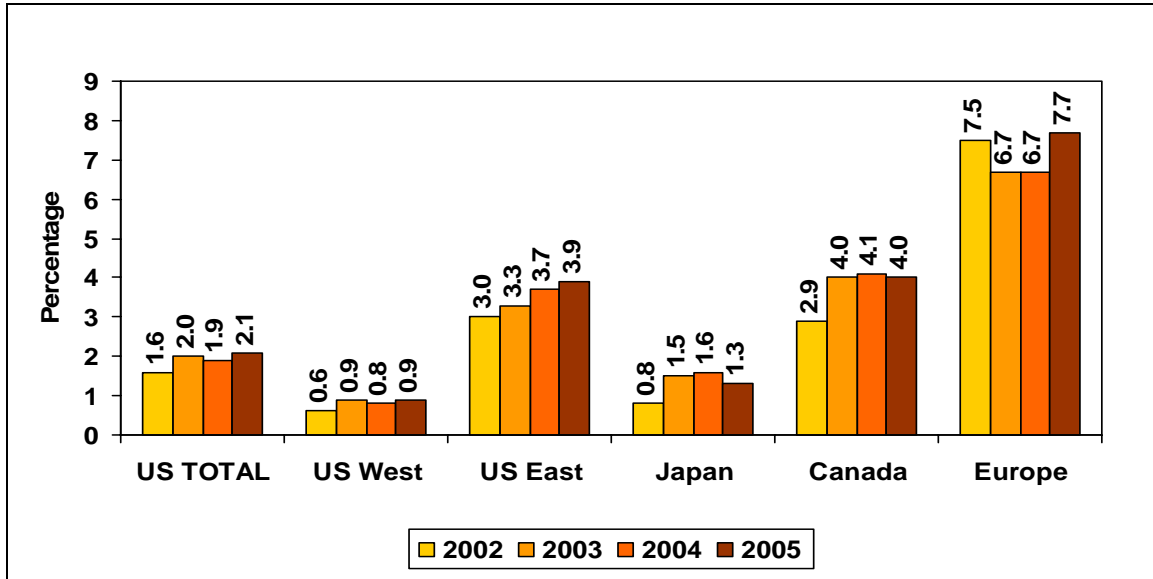


Figure 9, shows that the percentage of respondents who answered that they will “not at all likely” return to Hawaii in the next five years is fairly low among U.S. West, and Japan visitors and slightly higher for U.S. East and Canadian visitors. European respondents have the highest percentage of those who will definitely not revisit the islands in the next five years.

**Figure 9: Not Likely At All to Revisit Hawaii in Next Five Years  
[Percentage of visitors by MMA]**

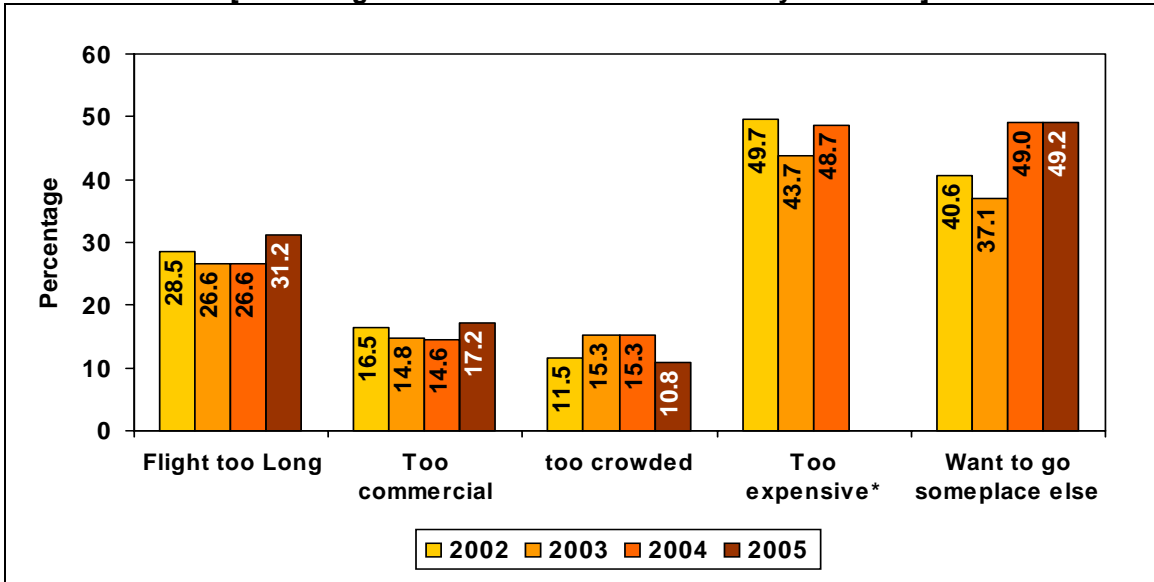


### Reasons for Not Revisiting Hawaii

Many of the visitors not planning to return in the next five years tell us that it is because they want to go someplace else, see Figures 10 and 11.

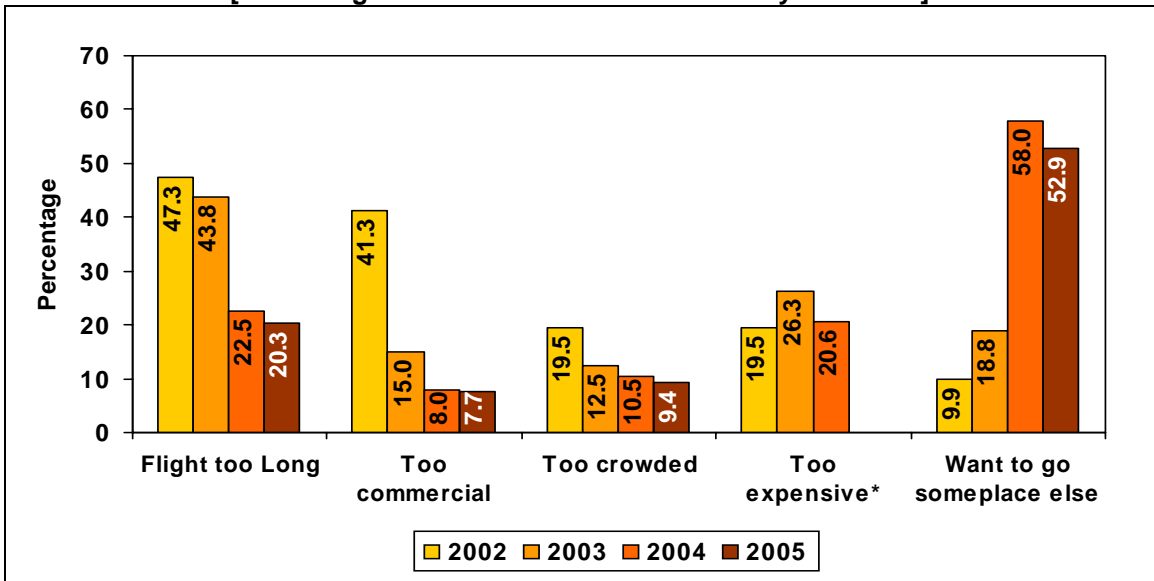
- Over the past two years nearly half of U.S. visitors who do not plan to return, are more likely to visit a new destination (49% in 2004 and 2005).
- More than half of Japanese visitors felt they needed to go someplace else (58% in 2004 and 52.9% in 2005).
- U.S. visitors also thought Hawaii was too expensive to return in the near future.
- In contrast, Japan visitors did not consider Hawaii to be too expensive (only one out of four visitors).

**Figure 10: Reasons for Not Revisiting Hawaii - U.S.**  
**[Percentage of Visitors Who Were Not Likely to Revisit]**



\* Comparable data not available in 2005. Survey changed to state: “Not enough value for the price” instead of “Too expensive”.

**Figure 11: Reason for Not Revisiting Hawaii - Japan**  
**[Percentage of Visitors Who Were Not Likely to Revisit]**



\* Comparable data not available in 2005. Survey changed to state: “Not enough value for the price” instead of “Too expensive”.

## Individual Island Experience

Each island has unique characteristics, activities and products which result in varied visitor experiences. Consequently, visitors were also asked to rate their experience on each island that they visited during their most recent trip. In general the majority of visitors felt that the islands they visited were excellent. However, the sentiment towards each island does vary by Major Market Area.

- Among U.S. visitors, a visit to Maui and Kauai is more likely to result in an excellent experience than Oahu and the Big Island. Maui was the only island to maintain and even improve satisfaction ratings.
- Maui received a consistently high rating across all MMA over the past five years.
- Overall, the Japan market does not rate Kauai as highly as it does the other islands (47.9 percent in 2005). Nonetheless, satisfaction for Kauai and Maui have improved.
- Canadian visitors found Kauai (65.3%) and Maui (68.0%) to more likely offer an excellent experience.
- Europeans consistently found Kauai to be an excellent experience over the past four years (69.9% in 2005). Maui shows a steady increase in excellent ratings year over year.

**Figure 12: Island Experience Rated as Excellent – U.S. [Percentage of visitors by Island]**

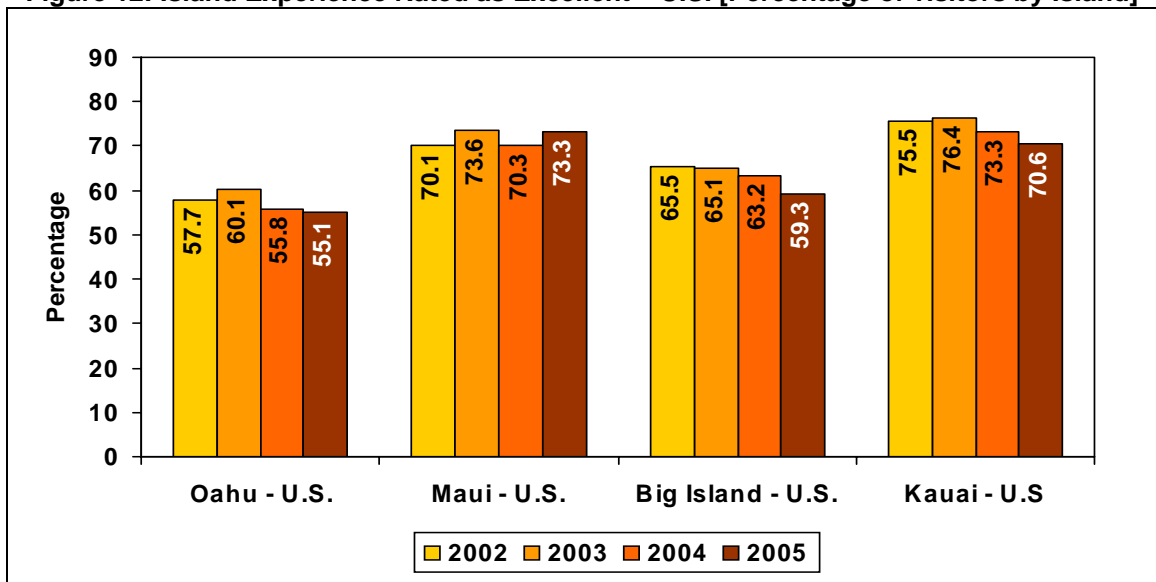


Figure 13: Island Experience Rated as Excellent – Japan [Percentage of visitors by Island]

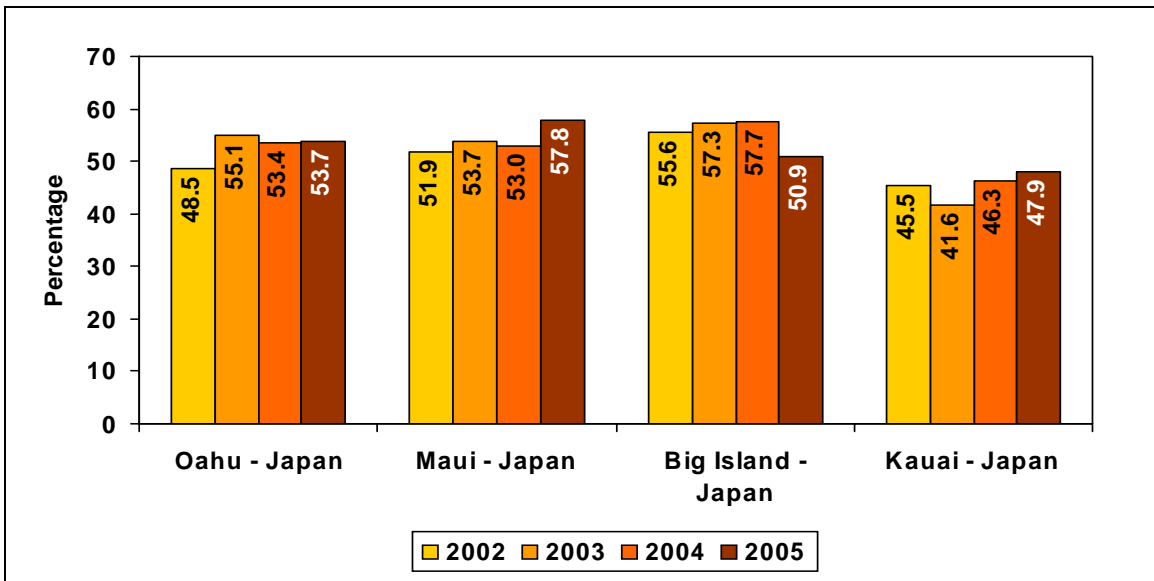


Figure 14: Island Experience Rated as Excellent – Canada [Percentage of visitors by Island]

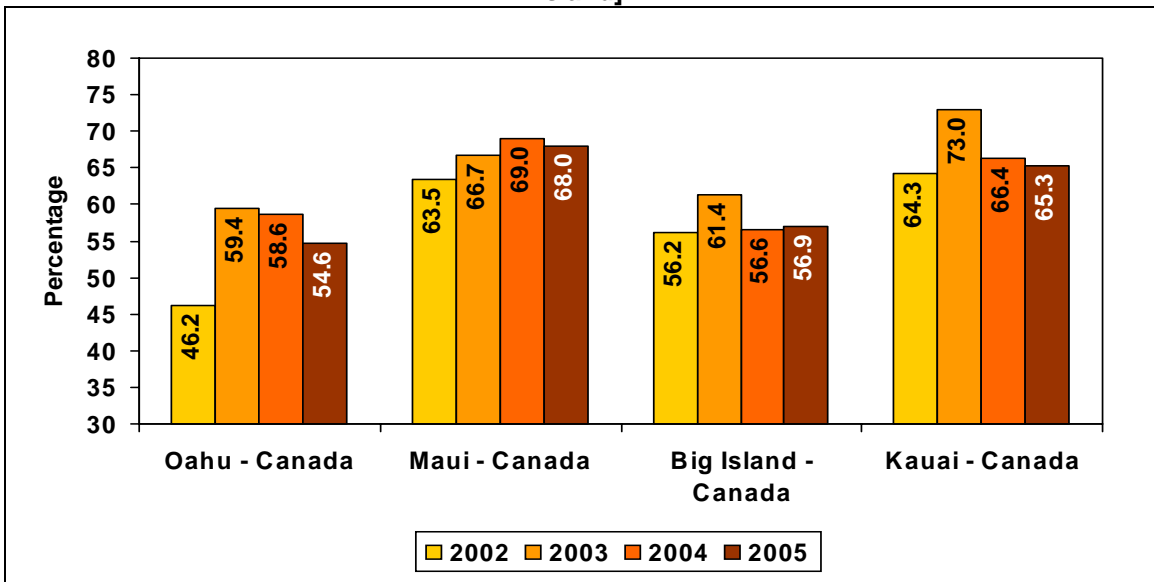
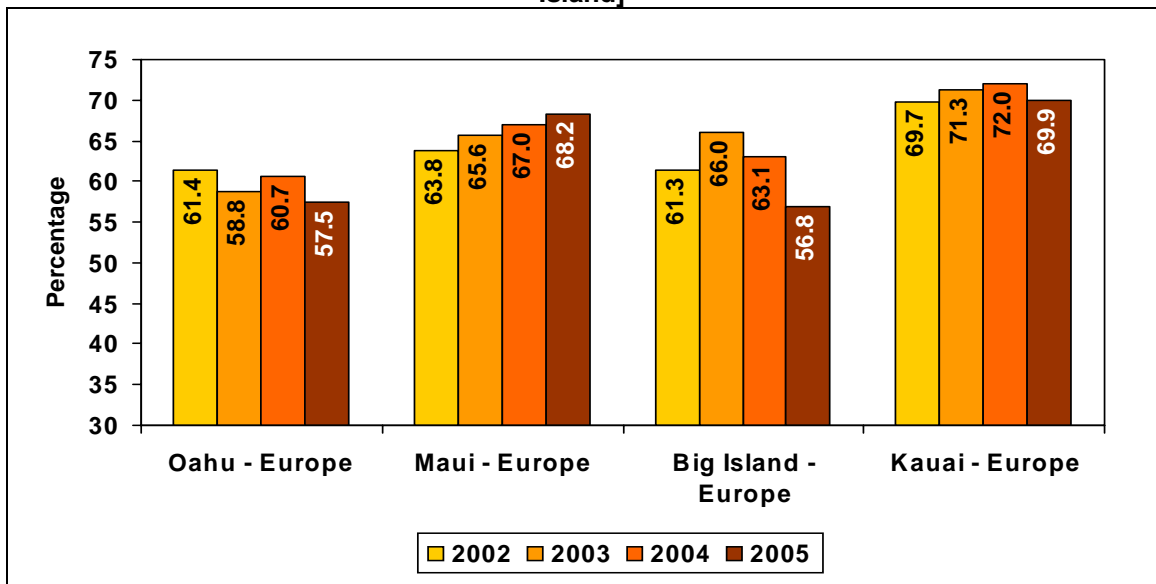


Figure 15: Island Experience Rated as Excellent – Europe [Percentage of visitors by Island]





## Trip Planning

### Sources of Information Used to Plan Trip

The value of the Internet as a trip-planning tool has steadily increased among U.S. and Japanese visitors. Assistance from travel agents for trip-planning has decreased in the U.S. market but continues to be a strong factor in the Japan market. Two-thirds of U.S. Visitors are using the Internet to help plan their trip.

- The percentage of U.S. visitors that use the Internet (66.4%) is more than double the number who rely on travel agents (27.7%) for trip-planning information.
- The proportion of Japanese visitors who used the Internet climbed from one-third to one-half in just four years.
- Japanese visitors continue to put heavy reliance on travel agents (67.5%) for information.
- Among printed materials, books continue to be popular in the U.S. (22.8%), while Japan visitors also utilize magazines (44%).

Figure 16: Sources of Information - U.S. Total [Percentage of visitors]

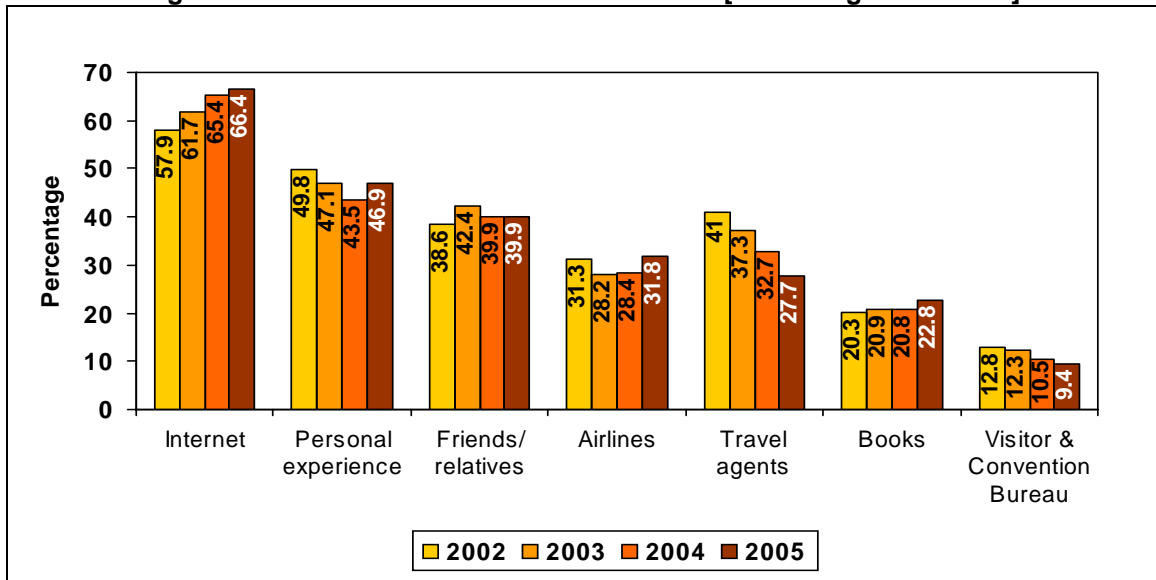
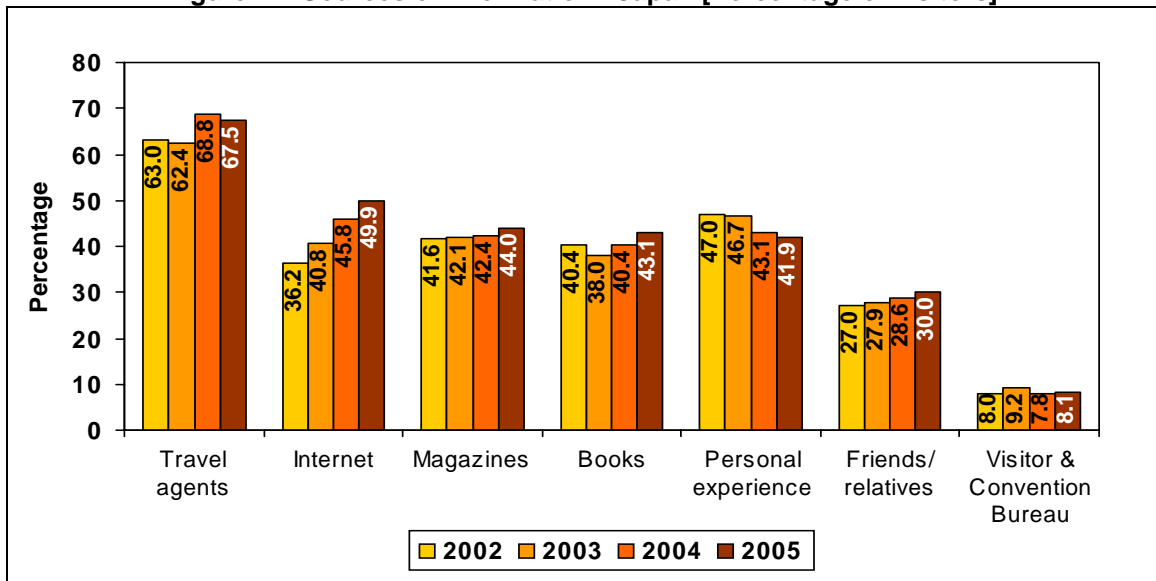


Figure 17: Sources of Information - Japan [Percentage of visitors]

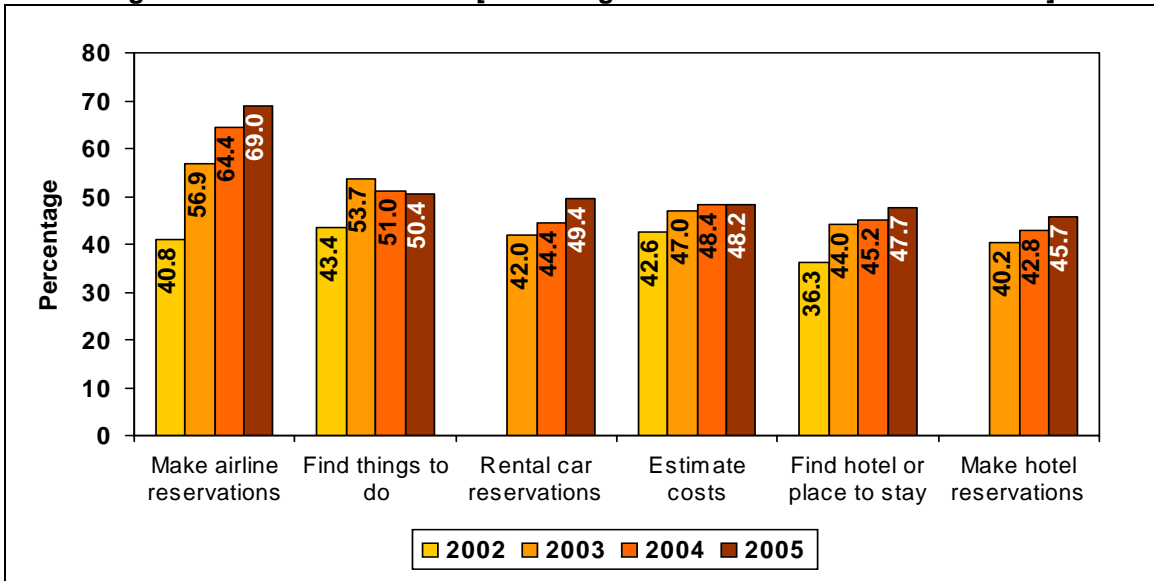


### Internet Use

Over the course of the past few years the intensity of Internet use has increased dramatically. The way in which the Internet is used for planning and booking of trips differs between the U.S. and Japan markets.

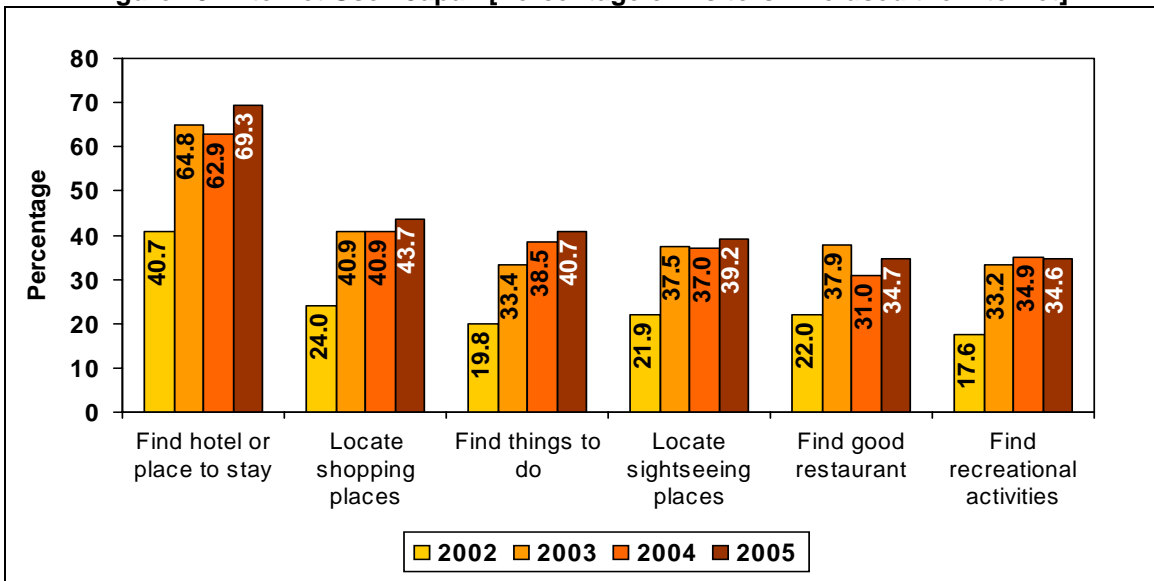
- U.S. visitors mainly use the Internet for making reservations. Online airline reservations have zoomed to two-thirds of Internet users (69%), while hotel (45.7%) and rental car (49.4%) reservations continue to be just less than half of users.
- Among Japanese visitors who used the Internet to plan and book their trip, the Internet was mainly used to find a hotel or a place to stay (40.7% in 2003 and 69.3% in 2005).
- Recently locating shopping places has become a popular use (43.7%) for Japanese Internet users.
- Few Japanese use the Internet for reservations.

**Figure 18: Internet Use - U.S. [Percentage of visitors who used the Internet]**



\* *Make hotel reservations and Rental car reservations were added starting in 2003.*

**Figure 19: Internet Use - Japan [Percentage of visitors who used the Internet]**



### 3. SATISFACTION AND RATING BY DESTINATION

## **SATISFACTION AND RATING BY DESTINATION**

In general, no one island or destination was found to be more outstanding than the others in the eyes of the visitors from various markets. Nevertheless, many visitors consistently found that Kauai's accommodations, attractions and activities were able to provide a very satisfying experience. On Oahu, shopping was rated higher than on the other islands while for Kona, the golf experience stood out. Maui proved to provide a universally satisfying experience. Each of Maui's attributes rated as high or very near to the highest ratings in the categories mentioned above. Each destination also appealed to the various Major Marketing Areas in different ways.

Note: Starting in 2005, visitors' satisfaction and rating of their experiences are reported on a destination by destination basis instead of an aggregated statewide measure. The data collection methodology was changed to better reflect the specificity and uniqueness of each island. Respondents were asked to select only one island to rate based on the location where they stayed the most nights. This resulted in responses unevenly distributed between islands; mainly concentrated on Oahu, Maui, Kona and Kauai. Therefore, data limitations hamper us from reporting fully on Lanai, Molokai, and Hilo. Data limitations also prevents us from reporting on the opinions on Kauai from Japanese visitors.

### **U.S. West Visitors**

- Overall U.S. West visitors were very satisfied with their experiences on all islands.
- Many visitors to Oahu were very satisfied with the accommodations (71.7%), particularly with the location of the accommodations. Many visitors (71.9%) were also very satisfied with parks and beaches.
- More than three-quarters of the visitors who stayed on Maui were also very satisfied with the accommodations (76.6%) and the parks and beaches (79.1%).
- Visitors to Kauai were particularly impressed with its accommodations (83.8 percent rated accommodations on Kauai as very satisfied). 74.5 percent of visitors who stayed on Kauai were very satisfied with the cleanliness and comfort of the accommodations.
- On the Kona side of Hawaii island (38 percent reported being very satisfied) transportation was less rewarding to U.S West visitors.

### **U.S. East Visitors**

- Visitors found most of the islands very fulfilling, giving high ratings for most experiences.
- Many Oahu visitors were very satisfied with the activities and attractions (74.2%). But only half (51.5%) were very satisfied with the value for the money they spent on those attractions.
- Numerous visitors who stayed on Maui were very satisfied with the accommodations (82.9%). Many were impressed by the facility (81.7 percent reported very satisfied) and

the cleanliness and comfort (80.2 percent very satisfied). They also found restaurants on Maui (67.6%) to be impressive but did not think so highly of the Maui airport (only 48.8 percent were very satisfied).

- U.S. East visitors were fond of Kauai's parks and beaches (83.4 percent reported very satisfied).
- Many of those who stayed and golfed in Kona found it very satisfying (72.1%). In particular many of these visitors (81.3%) reported that they were very satisfied with the location of the golf courses.
- Barely half of Kona visitors (51.2%) were very satisfied with Kona's airport, compared to 62.1 percent of U.S. East visitors who used Oahu's airport. Very few (26%) thought the availability of food at the Kona airport was very satisfying.

### **Japanese Visitors**

- Visitors from Japan were more discerning about their experiences in Hawaii and in general did not give high ratings to any of the features.
- On Oahu, just about half of the visitors were very satisfied with the parks and beaches (49.7%). Less than half of Oahu visitors (42.8%) felt, overall, that shopping was very satisfying.
- Seven out of ten Maui visitors felt very satisfied with the location of their accommodations but were not as satisfied with the overall accommodation (58.8%).
- Many visitors (60.5%) to Kona enjoyed the golf enough to say they were very satisfied. 70 percent were very satisfied with the location.
- Visitors were less satisfied with the airports on Oahu (18.5%) and in Kona (10.3%), less than one out of 5 were very satisfied with the airports.
- Japanese visitors did not find restaurants on Oahu, Maui and in Kona to their liking.

### **Canadian Visitors**

- In general Canadian visitors were impressed by their experiences on each island.
- On Oahu, Canada visitors were very satisfied with their transportation (69.2%) and the parks and beaches (76.6%).
- Scores of visitors to Maui found the accommodations very satisfying (77.3%), particularly for the location (78.6%).
- Visitors enjoyed the accommodations, parks and beaches of Kauai (87.4 percent for accommodations and 83.1 percent for parks & beaches). Many Canadian visitors (70.8%) attributed their satisfaction to the facilities at the parks and beaches.

## **European Visitors**

- Most of the European visitors spent the majority of time either on Oahu, Kauai or in Kona so specific data for the other islands were limited.
- Many Europeans (75%) were very satisfied with Oahu's parks and beaches. A similar percentage was very satisfied with Maui (75.8%).
- Many were very satisfied with their overall golf experience: Oahu (64.5%), Maui (65.7%), Kauai (76.7%) and Kona (67.9%).
- In general the airport and restaurants were the least satisfying to Europeans, no matter at which major destination they stayed. Only half of the European visitors to Oahu (51.8%) felt they were very satisfied with overall restaurants of Oahu. Other islands rated even lower.

**Table 3.1.1 Oahu Detailed Satisfaction Ratings by Category – U.S. Total  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	74.9	21.5	2.6	0.9
location	77.0	19.9	2.4	0.7
service	66.8	25.7	6.1	1.4
facility	66.3	25.8	6.2	1.6
cleanliness and comfort	69.5	21.7	7.1	1.6
value for your money	60.1	29.5	8.0	2.5
<b>Restaurant - overall</b>	59.2	34.9	4.6	1.3
location	63.2	32.1	4.1	0.6
variety	58.1	34.0	7.0	0.8
service	60.1	33.2	5.3	1.4
quality	58.2	34.5	5.7	1.5
value for your money	31.8	47.3	16.1	4.8
<b>Shopping - overall</b>	62.4	33.7	3.2	0.7
sufficient shopping places	71.1	24.8	3.4	0.8
locations	65.4	29.6	4.3	0.7
variety	57.6	34.1	7.5	0.7
service	61.1	34.2	4.1	0.6
quality	55.5	38.9	5.2	0.4
value for your money	37.9	47.1	13.0	2.0
<b>Golf - overall</b>	75.8	20.6	2.5	1.1
locations	77.0	19.2	3.1	0.7
service	70.2	24.4	4.8	0.7
value for your money	38.6	40.8	16.7	3.8
<b>Activities/Attractions - overall</b>	70.8	26.8	1.9	0.5
exciting	66.9	29.4	3.1	0.5
variety	70.4	25.3	4.0	0.4
service	68.4	27.6	3.3	0.6
value for your money	44.4	43.4	10.2	1.9
<b>Transportation - overall</b>	59.2	27.4	11.0	2.4
convenience	63.1	24.5	7.8	4.6
cleanliness and comfort	60.2	30.5	6.9	2.4
efficiency	58.0	26.1	11.5	4.4
value for your money	54.9	31.1	9.3	4.6
<b>Airports - overall</b>	58.0	35.8	4.9	1.3
signage	56.8	34.0	7.5	1.6
cleanliness and comfort	59.4	33.6	5.4	1.6
ease of getting around	55.1	34.3	8.1	2.5
availability of food	38.2	38.1	18.9	4.9
availability of shopping	43.6	39.9	13.0	3.6
friendliness of workers	55.8	34.7	7.3	2.1
<b>Parks &amp; Beaches - overall</b>	74.7	22.7	2.2	0.4
security	58.1	32.0	6.6	3.3
facility	62.3	32.1	4.5	1.0
cleanliness and comfort	62.6	28.8	7.3	1.2



**Table 3.1.2 Maui Detailed Satisfaction Ratings by Category – U.S. Total  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	76.6	20.4	2.3	0.7
location	77.2	20.1	2.1	0.6
service	68.1	25.6	5.1	1.1
facility	68.6	25.1	4.9	1.4
cleanliness and comfort	70.9	21.7	6.0	1.5
value for your money	61.4	29.3	7.1	2.2
<b>Restaurant - overall</b>	60.6	34.0	4.8	0.7
location	63.5	31.4	4.4	0.6
variety	58.6	33.2	7.2	1.0
service	60.8	33.5	4.9	0.8
quality	58.8	35.4	4.2	1.6
value for your money	30.4	48.4	16.7	4.5
<b>Shopping - overall</b>	60.7	35.6	3.0	0.6
sufficient shopping places	69.4	26.1	3.7	0.7
locations	64.1	30.6	4.7	0.5
variety	55.9	34.9	8.5	0.7
service	60.6	35.3	3.7	0.4
quality	53.4	41.7	4.6	0.3
value for your money	36.4	48.6	13.0	1.9
<b>Golf - overall</b>	76.4	20.3	2.5	0.8
locations	78.7	18.3	2.5	0.4
service	72.2	23.5	3.6	0.7
value for your money	39.3	38.8	17.2	4.7
<b>Activities/Attractions - overall</b>	70.5	27.3	1.9	0.4
exciting	66.5	30.1	2.9	0.4
variety	71.3	25.3	3.1	0.2
service	67.9	28.6	2.9	0.5
value for your money	42.8	45.3	10.3	1.6
<b>Transportation - overall</b>	59.2	28.2	11.1	1.4
convenience	62.0	24.6	9.3	4.1
cleanliness and comfort	59.4	32.5	7.4	0.8
efficiency	58.2	27.1	13.5	1.2
value for your money	52.9	33.7	10.0	3.3
<b>Airports - overall</b>	55.5	38.0	5.5	1.0
signage	55.8	35.0	8.0	1.2
cleanliness and comfort	57.6	35.4	6.0	1.0
ease of getting around	54.5	35.2	8.2	2.2
availability of food	34.6	39.4	20.8	5.1
availability of shopping	40.8	41.1	14.3	3.8
friendliness of workers	54.4	36.5	7.5	1.6
<b>Parks &amp; Beaches - overall</b>	75.0	22.5	2.2	0.3
security	57.8	32.5	6.8	2.9
facility	62.3	31.9	4.8	0.9
cleanliness and comfort	62.8	28.5	7.4	1.2

**Table 3.1.3 Kauai Detailed Satisfaction Ratings by Category – U.S. Total  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	76.1	20.8	2.3	0.7
location	77.3	19.9	2.2	0.7
service	66.3	27.3	5.1	1.3
facility	66.7	26.6	5.1	1.5
cleanliness and comfort	70.1	22.2	6.2	1.6
value for your money	61.0	30.0	6.9	2.1
<b>Restaurant - overall</b>	59.0	35.4	4.9	0.7
location	61.3	33.5	4.7	0.5
variety	56.0	35.5	7.6	0.9
service	60.0	33.6	5.6	0.8
quality	58.3	35.5	4.6	1.6
value for your money	30.8	48.1	16.4	4.7
<b>Shopping - overall</b>	59.8	35.7	3.8	0.7
sufficient shopping places	67.7	27.1	4.4	0.8
locations	62.4	31.7	5.3	0.6
variety	55.3	35.1	8.8	0.8
service	60.1	35.3	4.1	0.4
quality	53.7	40.3	5.6	0.3
value for your money	37.0	47.9	13.2	1.8
<b>Golf - overall</b>	78.6	18.1	2.4	1.0
locations	79.1	17.8	2.7	0.5
service	72.4	22.8	4.3	0.5
value for your money	39.5	40.4	16.3	3.8
<b>Activities/Attractions - overall</b>	70.9	26.9	1.9	0.4
exciting	66.9	29.6	3.2	0.4
variety	70.6	25.7	3.4	0.3
service	68.1	28.4	3.0	0.5
value for your money	43.3	45.2	9.9	1.6
<b>Transportation - overall</b>	58.3	29.6	10.8	1.2
convenience	61.1	26.3	8.6	4.0
cleanliness and comfort	58.1	33.3	8.0	0.7
efficiency	57.3	28.5	13.2	1.0
value for your money	52.0	34.6	10.2	3.2
<b>Airports - overall</b>	57.1	37.1	5.0	0.9
signage	56.6	34.4	7.9	1.1
cleanliness and comfort	59.2	34.5	5.3	1.0
ease of getting around	54.8	34.4	8.2	2.5
availability of food	36.7	37.8	20.6	5.0
availability of shopping	41.9	39.5	14.7	3.8
friendliness of workers	55.5	36.0	7.0	1.5
<b>Parks &amp; Beaches - overall</b>	75.2	22.3	2.3	0.3
security	57.3	33.0	6.7	3.0
facility	61.5	32.8	4.6	1.1
cleanliness and comfort	62.5	29.1	7.1	1.2

**Table 3.1.4 Kona Detailed Satisfaction Ratings by Category – U.S. Total  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	75.7	21.3	2.2	0.8
location	77.4	19.8	2.2	0.6
service	66.3	27.2	5.2	1.3
facility	66.4	26.6	5.4	1.6
cleanliness and comfort	69.2	22.7	6.5	1.6
value for your money	60.3	30.5	7.0	2.2
<b>Restaurant - overall</b>	59.0	35.4	4.9	0.7
location	61.5	33.3	4.6	0.6
variety	56.6	34.9	7.5	1.0
service	59.1	34.5	5.5	0.8
quality	57.6	35.9	4.9	1.6
value for your money	30.5	48.3	16.5	4.8
<b>Shopping - overall</b>	59.9	35.9	3.5	0.8
sufficient shopping places	68.1	26.7	4.3	0.9
locations	62.9	31.2	5.2	0.7
variety	55.1	35.7	8.4	0.8
service	59.7	35.8	4.0	0.4
quality	53.7	40.6	5.3	0.4
value for your money	36.8	48.3	13.0	1.9
<b>Golf - overall</b>	76.6	20.0	2.4	1.0
locations	78.2	18.6	2.7	0.5
service	70.6	24.6	4.4	0.5
value for your money	37.5	41.4	17.3	3.8
<b>Activities/Attractions - overall</b>	69.4	28.3	1.9	0.4
exciting	65.6	30.9	3.1	0.4
variety	69.8	26.4	3.5	0.3
service	66.3	30.1	3.2	0.5
value for your money	42.3	45.7	10.3	1.7
<b>Transportation - overall</b>	58.5	29.1	11.2	1.2
convenience	61.4	25.4	9.0	4.1
cleanliness and comfort	57.8	33.5	8.1	0.7
efficiency	57.1	28.6	13.4	1.0
value for your money	51.6	34.2	10.9	3.2
<b>Airports - overall</b>	56.5	37.6	5.0	0.9
signage	55.8	35.2	7.9	1.1
cleanliness and comfort	58.6	35.0	5.3	1.1
ease of getting around	54.5	34.5	8.5	2.5
availability of food	34.9	39.0	20.8	5.2
availability of shopping	41.1	40.3	14.6	4.0
friendliness of workers	54.7	36.7	7.0	1.6
<b>Parks &amp; Beaches - overall</b>	74.5	22.8	2.3	0.3
security	57.2	32.7	7.0	3.1
facility	61.6	32.4	5.0	1.0
cleanliness and comfort	62.0	29.3	7.3	1.4

**Table 3.2.1 Oahu Detailed Satisfaction Ratings by Category – U.S. West  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	71.7	24.8	2.5	1.0
location	72.4	24.6	1.9	1.0
service	63.6	29.9	5.8	0.7
facility	62.8	29.1	6.1	2.0
cleanliness and comfort	64.8	26.5	6.8	1.9
value for your money	58.5	30.5	8.7	2.3
<b>Restaurant - overall</b>	61.1	32.4	6.1	0.5
location	56.9	36.8	5.8	0.5
variety	57.0	33.1	9.1	0.8
service	58.2	36.3	4.9	0.6
quality	54.4	37.0	5.4	3.1
value for your money	35.3	43.9	14.8	6.0
<b>Shopping - overall</b>	69.1	28.5	1.9	0.5
sufficient shopping places	77.3	21.2	0.9	0.6
locations	70.2	26.0	3.3	0.5
variety	62.6	32.3	4.4	0.7
service	61.0	35.3	3.2	0.5
quality	55.4	40.5	4.0	0.1
value for your money	41.9	45.3	11.5	1.2
<b>Golf - overall</b>	70.2	26.1	2.3	1.4
locations	66.1	27.3	6.6	0.0
service	61.1	32.0	6.9	0.0
value for your money	40.5	29.3	24.4	5.7
<b>Activities/Attractions - overall</b>	70.9	26.9	1.8	0.4
exciting	62.7	34.6	1.9	0.8
variety	68.0	28.4	3.2	0.4
service	65.8	30.9	2.5	0.9
value for your money	45.2	43.6	9.5	1.7
<b>Transportation - overall</b>	65.5	25.2	8.9	0.3
convenience	69.3	19.6	10.3	0.7
cleanliness and comfort	62.8	26.9	9.8	0.5
efficiency	60.8	24.6	13.7	0.9
value for your money	59.6	27.7	11.0	1.7
<b>Airports - overall</b>	53.9	39.4	5.6	1.0
signage	49.6	37.1	12.0	1.3
cleanliness and comfort	54.0	36.3	8.2	1.5
ease of getting around	47.4	37.1	12.1	3.4
availability of food	35.0	39.9	19.7	5.4
availability of shopping	42.5	39.0	13.8	4.7
friendliness of workers	51.0	40.0	7.2	1.8
<b>Parks &amp; Beaches - overall</b>	71.9	25.9	1.9	0.3
security	55.3	32.6	6.7	5.5
facility	61.7	33.0	3.9	1.3
cleanliness and comfort	59.4	30.4	8.4	1.8

**Table 3.2.2 Maui Detailed Satisfaction Ratings by Category – U.S. West  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	76.6	20.2	2.7	0.6
location	82.9	14.7	1.8	0.6
service	67.8	24.7	5.6	1.9
facility	67.3	26.5	5.3	0.8
cleanliness and comfort	70.4	20.4	7.9	1.3
value for your money	61.4	31.1	5.4	2.1
<b>Restaurant - overall</b>	61.7	33.9	3.7	0.7
location	72.0	25.5	2.1	0.4
variety	64.1	31.4	4.2	0.4
service	65.4	30.1	4.0	0.6
quality	64.3	32.1	3.0	0.6
value for your money	25.2	54.0	17.3	3.5
<b>Shopping - overall</b>	65.5	30.9	3.2	0.5
sufficient shopping places	73.9	22.7	2.5	0.9
locations	69.0	27.7	3.0	0.2
variety	59.3	34.1	5.7	0.9
service	65.0	30.9	3.8	0.3
quality	60.4	35.1	4.3	0.2
value for your money	36.6	49.2	12.3	2.0
<b>Golf - overall</b>	74.6	23.1	1.0	1.3
locations	76.8	19.8	2.0	1.4
service	68.3	29.2	1.1	1.5
value for your money	25.8	48.8	22.4	2.9
<b>Activities/Attractions - overall</b>	67.5	30.9	1.4	0.2
exciting	67.2	29.8	3.0	0.0
variety	74.1	23.6	2.3	0.0
service	67.2	28.9	4.0	0.0
value for your money	40.5	47.8	9.4	2.3
<b>Transportation - overall</b>	50.2	27.3	21.2	1.3
convenience	52.9	28.2	6.9	12.0
cleanliness and comfort	51.8	40.0	8.2	0.0
efficiency	54.2	25.3	20.5	0.0
value for your money	43.5	42.5	8.0	6.0
<b>Airports - overall</b>	60.4	34.8	4.5	0.3
signage	60.6	32.8	6.5	0.2
cleanliness and comfort	63.9	31.1	4.4	0.5
ease of getting around	60.5	31.6	5.9	2.0
availability of food	39.1	38.6	18.6	3.7
availability of shopping	48.2	38.0	11.7	2.1
friendliness of workers	56.2	35.0	7.2	1.6
<b>Parks &amp; Beaches - overall</b>	79.1	19.0	1.6	0.2
security	61.8	31.0	4.7	2.5
facility	63.3	29.5	6.6	0.5
cleanliness and comfort	66.4	26.5	6.4	0.7

**Table 3.2.3 Kauai Detailed Satisfaction Ratings by Category – U.S. West  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	83.8	14.8	1.4	0.0
location	80.6	16.9	2.0	0.5
service	69.9	26.0	3.8	0.4
facility	71.1	24.4	3.0	1.5
cleanliness and comfort	74.5	21.4	3.0	1.1
value for your money	63.2	30.1	4.8	1.9
<b>Restaurant - overall</b>	54.6	40.1	4.2	1.1
location	54.6	40.6	4.1	0.7
variety	49.1	39.2	11.0	0.8
service	56.6	35.1	7.4	0.9
quality	54.9	37.6	6.1	1.4
value for your money	27.3	47.3	20.3	5.0
<b>Shopping - overall</b>	48.5	46.7	4.4	0.4
sufficient shopping places	54.0	37.2	8.8	0.0
locations	50.5	39.9	9.5	0.0
variety	46.6	39.5	13.4	0.5
service	56.4	39.1	3.6	0.9
quality	46.3	47.3	5.9	0.5
value for your money	33.3	51.9	13.1	1.8
<b>Golf - overall</b>	83.7	14.1	2.2	0.0
locations	85.5	14.5	0.0	0.0
service	77.0	16.3	6.8	0.0
value for your money	59.8	35.5	2.4	2.4
<b>Activities/Attractions - overall</b>	76.6	21.6	1.5	0.4
exciting	73.1	23.9	3.0	0.0
variety	73.8	23.3	2.8	0.0
service	71.3	25.1	3.3	0.4
value for your money	39.3	49.6	10.7	0.4
<b>Transportation - overall</b>	44.1	52.2	3.7	0.0
convenience	42.0	47.1	7.0	4.0
cleanliness and comfort	47.8	52.2	0.0	0.0
efficiency	46.3	46.1	7.6	0.0
value for your money	32.6	58.8	8.5	0.0
<b>Airports - overall</b>	62.7	33.0	3.2	1.1
signage	61.3	31.3	5.4	2.0
cleanliness and comfort	60.7	36.6	1.6	1.0
ease of getting around	58.2	32.1	8.0	1.7
availability of food	35.8	39.4	20.9	3.9
availability of shopping	38.0	46.5	14.0	1.4
friendliness of workers	56.7	37.6	4.3	1.5
<b>Parks &amp; Beaches - overall</b>	75.6	21.6	2.4	0.3
security	57.4	34.2	7.5	0.8
facility	66.7	29.3	3.7	0.4
cleanliness and comfort	65.9	28.1	5.4	0.5

**Table 3.2.4 Kona Detailed Satisfaction Ratings by Category – U.S. West  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	76.9	19.6	1.9	1.6
location	74.0	20.6	4.8	0.7
service	64.7	28.6	4.8	1.9
facility	69.5	23.6	4.6	2.3
cleanliness and comfort	71.5	19.2	7.2	2.2
value for your money	58.3	33.2	5.2	3.2
<b>Restaurant - overall</b>	55.6	36.6	6.6	1.2
location	60.3	33.2	5.9	0.7
variety	50.9	39.1	8.4	1.6
service	56.9	36.9	4.8	1.3
quality	59.4	34.8	4.8	1.0
value for your money	31.3	50.2	12.5	6.0
<b>Shopping - overall</b>	52.9	38.2	6.3	2.5
sufficient shopping places	56.5	34.9	6.5	2.1
locations	50.8	39.5	7.6	2.1
variety	46.4	40.2	12.6	0.8
service	59.8	35.0	4.8	0.5
quality	49.5	42.8	6.4	1.2
value for your money	29.1	52.8	14.3	3.8
<b>Golf - overall</b>	85.8	6.8	5.5	2.0
locations	82.2	13.7	4.2	0.0
service	77.5	12.5	9.9	0.0
value for your money	45.6	29.6	20.4	4.4
<b>Activities/Attractions - overall</b>	70.0	27.7	1.6	0.7
exciting	64.1	32.3	2.9	0.8
variety	67.9	27.8	4.3	0.0
service	68.1	27.7	3.5	0.8
value for your money	43.6	44.0	10.1	2.3
<b>Transportation - overall</b>	38.0	47.7	6.7	7.6
convenience	46.2	41.1	7.1	5.6
cleanliness and comfort	47.5	42.9	5.1	4.5
efficiency	52.2	40.1	2.2	5.5
value for your money	28.6	45.8	11.5	14.2
<b>Airports - overall</b>	54.9	37.8	6.1	1.2
signage	61.3	32.2	4.4	2.1
cleanliness and comfort	57.9	37.0	4.1	1.0
ease of getting around	57.3	35.8	6.2	0.6
availability of food	29.1	36.4	28.1	6.5
availability of shopping	32.6	36.9	24.2	6.3
friendliness of workers	58.8	27.9	12.3	1.0
<b>Parks &amp; Beaches - overall</b>	73.9	23.0	2.5	0.7
security	55.7	35.7	5.9	2.7
facility	55.2	38.4	4.5	1.9
cleanliness and comfort	57.4	33.3	6.8	2.5

**Table 3.3.1 Oahu Detailed Satisfaction Ratings by Category – U.S. East  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	73.3	21.5	3.7	1.5
location	76.4	20.0	2.9	0.8
service	69.1	20.4	8.6	1.9
facility	67.4	21.6	9.2	1.8
cleanliness and comfort	71.4	17.7	9.0	1.8
value for your money	59.5	26.4	10.9	3.2
<b>Restaurant - overall</b>	59.1	33.8	3.8	3.3
location	67.7	28.7	3.0	0.7
variety	63.4	30.9	5.3	0.4
service	61.5	30.5	4.7	3.4
quality	59.5	30.1	9.4	1.0
value for your money	36.5	44.2	14.7	4.6
<b>Shopping - overall</b>	67.5	29.3	2.8	0.4
sufficient shopping places	77.8	20.5	1.3	0.3
locations	71.6	25.7	1.7	1.0
variety	63.7	30.4	5.4	0.6
service	63.5	30.5	5.0	1.0
quality	59.8	34.3	5.4	0.5
value for your money	41.2	42.1	14.8	2.0
<b>Golf - overall</b>	68.1	27.8	2.4	1.7
locations	70.0	23.5	4.6	1.8
service	65.9	26.7	5.6	1.8
value for your money	39.7	43.7	13.4	3.2
<b>Activities/Attractions - overall</b>	74.2	23.0	1.8	0.9
exciting	70.1	26.0	3.0	0.9
variety	71.2	22.5	5.5	0.9
service	73.8	21.6	3.8	0.8
value for your money	51.5	36.2	10.0	2.4
<b>Transportation - overall</b>	60.5	24.2	10.9	4.3
convenience	65.9	22.8	6.0	5.3
cleanliness and comfort	64.2	25.7	4.6	5.5
efficiency	59.0	22.6	8.0	10.3
value for your money	60.6	24.5	8.0	7.0
<b>Airports - overall</b>	62.1	30.8	4.5	2.5
signage	59.7	30.7	6.0	3.6
cleanliness and comfort	62.6	28.2	5.6	3.6
ease of getting around	58.4	32.5	6.9	2.2
availability of food	48.0	35.4	13.0	3.5
availability of shopping	50.0	39.3	8.5	2.2
friendliness of workers	60.2	27.9	8.1	3.7
<b>Parks &amp; Beaches - overall</b>	75.3	22.2	2.1	0.5
security	61.2	29.5	5.5	3.7
facility	64.4	30.8	3.6	1.2
cleanliness and comfort	64.4	27.3	7.2	1.1



**Table 3.3.2 Maui Detailed Satisfaction Ratings by Category – U.S. East  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	82.9	14.8	1.9	0.4
location	77.3	20.7	1.5	0.4
service	78.1	17.4	3.9	0.7
facility	81.7	15.2	2.4	0.7
cleanliness and comfort	80.2	15.7	3.2	0.9
value for your money	67.5	23.7	6.9	1.9
<b>Restaurant - overall</b>	67.6	27.3	4.5	0.6
location	72.3	22.8	4.3	0.7
variety	69.2	24.7	5.1	1.1
service	66.5	30.3	2.1	1.1
quality	63.7	33.3	1.9	1.1
value for your money	30.1	49.8	17.6	2.5
<b>Shopping - overall</b>	60.2	38.5	1.4	0.0
sufficient shopping places	71.1	26.6	2.2	0.1
locations	67.0	29.9	3.0	0.1
variety	56.2	33.5	10.2	0.1
service	61.5	35.4	3.1	0.0
quality	49.4	48.3	2.0	0.3
value for your money	33.9	48.9	15.5	1.8
<b>Golf - overall</b>	74.2	23.6	2.2	0.0
locations	81.5	17.2	1.2	0.0
service	77.3	21.5	0.0	1.2
value for your money	42.7	32.8	16.9	7.6
<b>Activities/Attractions - overall</b>	73.7	24.4	1.5	0.4
exciting	69.0	28.8	1.8	0.4
variety	76.4	21.8	1.4	0.4
service	73.2	24.7	1.5	0.6
value for your money	44.7	44.3	9.9	1.1
<b>Transportation - overall</b>	63.7	22.2	11.5	2.5
convenience	64.5	19.1	12.6	3.8
cleanliness and comfort	67.8	28.4	2.6	1.2
efficiency	62.6	20.9	14.1	2.3
value for your money	59.9	27.2	9.5	3.4
<b>Airports - overall</b>	48.8	41.8	8.1	1.3
signage	54.7	35.0	8.6	1.7
cleanliness and comfort	53.4	36.4	9.8	0.4
ease of getting around	56.3	36.9	6.4	0.4
availability of food	30.1	42.8	22.5	4.6
availability of shopping	35.3	47.2	14.5	3.0
friendliness of workers	53.5	35.4	9.9	1.2
<b>Parks &amp; Beaches - overall</b>	77.3	20.7	2.0	0.0
security	61.6	30.9	6.1	1.4
facility	65.4	28.9	4.9	0.8
cleanliness and comfort	66.6	24.8	7.7	0.9

**Table 3.3.3 Kauai Detailed Satisfaction Ratings by Category – U.S. East  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	85.9	11.0	2.6	0.5
location	79.3	19.0	1.2	0.5
service	69.5	27.9	1.1	1.5
facility	75.6	21.3	1.9	1.2
cleanliness and comfort	84.0	13.6	1.2	1.2
value for your money	70.5	23.8	5.0	0.7
<b>Restaurant - overall</b>	56.3	37.3	5.9	0.5
location	52.5	39.5	8.0	0.0
variety	47.8	44.0	7.5	0.7
service	64.3	26.7	7.5	1.6
quality	64.8	30.3	3.8	1.1
value for your money	36.4	47.5	13.5	2.6
<b>Shopping - overall</b>	45.7	44.4	9.9	0.0
sufficient shopping places	49.6	41.6	8.4	0.4
locations	47.5	44.3	7.8	0.4
variety	48.5	33.9	17.2	0.4
service	56.6	35.5	7.9	0.0
quality	47.5	40.6	11.9	0.0
value for your money	38.4	39.4	22.2	0.0
<b>Golf - overall</b>	100.0	0.0	0.0	0.0
locations	92.4	7.6	0.0	0.0
service	92.6	7.4	0.0	0.0
value for your money	53.2	40.0	4.1	2.7
<b>Activities/Attractions - overall</b>	83.7	15.0	1.4	0.0
exciting	77.8	18.9	3.3	0.0
variety	76.2	21.1	1.6	1.0
service	84.9	14.0	1.0	0.0
value for your money	54.7	40.3	5.0	0.0
<b>Transportation - overall</b>	54.5	39.8	5.8	0.0
convenience	44.6	52.5	3.0	0.0
cleanliness and comfort	63.2	36.8	0.0	0.0
efficiency	54.1	39.6	6.3	0.0
value for your money	61.5	26.3	12.2	0.0
<b>Airports - overall</b>	61.2	34.4	4.4	0.0
signage	64.5	25.6	7.7	2.2
cleanliness and comfort	69.7	25.2	5.2	0.0
ease of getting around	64.9	28.7	4.3	2.2
availability of food	53.9	23.4	20.8	1.8
availability of shopping	44.1	33.0	21.3	1.6
friendliness of workers	68.2	26.1	5.7	0.0
<b>Parks &amp; Beaches - overall</b>	83.4	14.9	1.7	0.0
security	60.3	36.6	3.1	0.0
facility	59.4	37.1	1.1	2.4
cleanliness and comfort	67.9	28.0	3.3	0.8

**Table 3.3.4 Kona Detailed Satisfaction Ratings by Category – U.S. East  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	80.4	17.5	0.4	1.6
location	81.6	17.4	1.0	0.0
service	70.0	25.4	2.4	2.2
facility	72.1	19.6	6.0	2.2
cleanliness and comfort	73.1	19.5	5.3	2.2
value for your money	61.4	30.8	5.6	2.2
<b>Restaurant - overall</b>	55.6	37.2	5.8	1.4
location	53.8	38.9	6.8	0.5
variety	57.1	34.6	6.5	1.7
service	48.3	43.5	6.6	1.6
quality	52.4	37.2	9.5	1.0
value for your money	31.8	50.3	14.8	3.1
<b>Shopping - overall</b>	43.2	50.3	5.6	0.9
sufficient shopping places	51.7	38.0	9.4	0.9
locations	51.7	38.4	7.8	2.0
variety	43.1	44.4	11.9	0.7
service	48.4	44.6	7.0	0.0
quality	44.7	46.4	8.3	0.6
value for your money	33.9	43.6	21.4	1.1
<b>Golf - overall</b>	72.1	27.9	0.0	0.0
locations	81.3	18.7	0.0	0.0
service	66.5	33.5	0.0	0.0
value for your money	22.6	57.2	17.5	2.6
<b>Activities/Attractions - overall</b>	63.9	34.0	2.2	0.0
exciting	60.6	37.8	1.5	0.0
variety	63.2	31.5	3.9	1.4
service	58.0	39.2	2.8	0.0
value for your money	40.8	48.5	9.2	1.6
<b>Transportation - overall</b>	59.4	24.4	16.2	0.0
convenience	58.9	23.1	14.5	3.5
cleanliness and comfort	54.7	40.4	4.9	0.0
efficiency	48.7	38.8	12.5	0.0
value for your money	49.6	20.1	30.3	0.0
<b>Airports - overall</b>	51.2	43.5	5.3	0.0
signage	52.6	39.0	7.2	1.2
cleanliness and comfort	61.4	32.2	5.2	1.3
ease of getting around	61.3	28.9	8.1	1.7
availability of food	26.0	42.6	25.9	5.6
availability of shopping	29.5	44.9	20.1	5.5
friendliness of workers	57.6	36.0	4.8	1.7
<b>Parks &amp; Beaches - overall</b>	73.9	22.0	3.2	0.9
security	58.5	32.6	7.4	1.4
facility	59.5	31.0	7.9	1.5
cleanliness and comfort	59.8	29.9	6.7	3.6

**Table 3.4.1 Oahu Detailed Satisfaction Ratings by Category – Japan  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	42.5	47.3	9.3	1.0
location	49.6	36.8	10.8	2.8
service	26.0	52.6	18.9	2.5
facility	25.0	48.2	23.2	3.7
cleanliness and comfort	35.3	47.8	14.5	2.3
value for your money	33.2	49.0	15.3	2.5
<b>Restaurant - overall</b>	22.5	57.4	18.4	1.7
location	28.7	56.2	14.0	1.0
variety	24.2	51.1	22.4	2.2
service	21.2	53.8	22.5	2.5
quality	18.0	47.7	27.7	6.7
value for your money	15.1	47.4	30.3	7.3
<b>Shopping - overall</b>	42.8	50.1	6.6	0.5
sufficient shopping places	55.4	39.4	4.9	0.3
locations	39.9	51.6	8.0	0.5
variety	39.7	47.4	11.7	1.1
service	28.3	55.3	15.3	1.1
quality	28.1	59.0	12.0	0.9
value for your money	26.3	53.3	19.0	1.4
<b>Golf - overall</b>	37.3	47.0	14.1	1.5
locations	48.0	42.2	9.1	0.7
service	23.0	41.9	29.8	5.3
value for your money	22.2	41.4	26.9	9.6
<b>Activities/Attractions - overall</b>	37.1	52.7	9.4	0.9
exciting	41.1	49.3	8.6	1.0
variety	34.1	50.9	13.7	1.3
service	28.3	53.3	16.3	2.0
value for your money	22.8	47.6	25.3	4.4
<b>Transportation - overall</b>	37.5	50.1	10.8	1.5
convenience	38.5	45.5	13.7	2.2
cleanliness and comfort	28.0	52.7	17.6	1.7
efficiency	27.9	47.6	20.9	3.6
value for your money	37.7	48.6	12.1	1.6
<b>Airports - overall</b>	18.5	60.4	19.4	1.8
signage	20.1	57.1	21.0	1.9
cleanliness and comfort	20.8	55.5	21.4	2.3
ease of getting around	15.8	48.6	30.3	5.2
availability of food	9.2	33.5	47.2	10.2
availability of shopping	11.8	40.3	40.4	7.4
friendliness of workers	18.5	55.6	21.4	4.5
<b>Parks &amp; Beaches - overall</b>	49.7	45.9	4.1	0.2
security	41.8	49.8	7.6	0.8
facility	31.3	54.3	13.7	0.7
cleanliness and comfort	38.4	48.9	11.6	1.0

**Table 3.4.2 Maui Detailed Satisfaction Ratings by Category – Japan  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	58.8	37.9	2.4	0.9
location	70.2	26.2	3.7	0.0
service	40.5	43.8	12.2	3.5
facility	42.1	48.7	8.6	0.6
cleanliness and comfort	51.9	39.0	9.1	0.0
value for your money	41.2	42.7	12.4	3.7
<b>Restaurant - overall</b>	24.7	47.3	25.7	2.3
location	41.7	41.0	16.4	0.9
variety	17.7	41.7	35.3	5.4
service	28.3	41.3	24.3	6.2
quality	17.3	46.2	26.9	9.6
value for your money	14.6	41.9	32.8	10.7
<b>Shopping - overall</b>	20.4	50.9	23.9	4.8
sufficient shopping places	21.5	49.0	22.2	7.3
locations	26.9	49.5	22.2	1.3
variety	14.5	51.1	27.5	6.9
service	18.4	62.1	18.4	1.1
quality	14.8	65.5	18.6	1.1
value for your money	13.1	57.5	27.0	2.3
<b>Golf - overall</b>	47.0	51.2	1.8	0.0
locations	62.3	37.7	0.0	0.0
service	36.3	53.8	9.9	0.0
value for your money	35.5	54.7	8.0	1.8
<b>Activities/Attractions - overall</b>	37.6	46.9	11.4	4.1
exciting	36.5	45.2	14.3	4.0
variety	33.4	44.7	18.1	3.9
service	32.4	48.4	19.2	0.0
value for your money	30.0	40.3	29.0	0.8
<b>Transportation - overall</b>	21.0	47.3	25.0	6.7
convenience	17.7	44.7	33.5	4.1
cleanliness and comfort	19.3	52.4	26.4	1.9
efficiency	10.4	39.3	42.4	8.0
value for your money	15.4	57.7	22.2	4.7
<b>Airports - overall</b>	8.8	72.3	17.4	1.5
signage	12.3	65.3	18.8	3.6
cleanliness and comfort	15.4	60.7	21.4	2.5
ease of getting around	11.4	55.9	25.9	6.8
availability of food	7.2	34.1	48.6	10.1
availability of shopping	6.9	37.5	43.9	11.7
friendliness of workers	19.5	54.2	18.6	7.7
<b>Parks &amp; Beaches - overall</b>	45.7	49.6	4.7	0.0
security	32.8	62.8	4.4	0.0
facility	26.1	64.0	8.6	1.4
cleanliness and comfort	37.9	53.5	8.1	0.6

**Table 3.4.3 Kona Detailed Satisfaction Ratings by Category – Japan**  
**[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	55.5	37.9	6.6	0.0
location	62.6	30.5	6.9	0.0
service	39.4	49.2	9.3	2.1
facility	44.7	42.5	12.1	0.7
cleanliness and comfort	51.7	37.7	10.1	0.5
value for your money	37.2	48.2	14.6	0.0
<b>Restaurant - overall</b>	16.1	58.1	24.7	1.2
location	38.5	48.4	12.6	0.5
variety	15.8	42.4	36.6	5.3
service	24.5	49.8	24.5	1.1
quality	10.9	51.4	31.5	6.3
value for your money	10.0	47.6	38.6	3.7
<b>Shopping - overall</b>	11.7	42.5	40.8	5.0
sufficient shopping places	10.9	33.0	43.4	12.7
locations	16.2	48.2	28.1	7.4
variety	8.6	37.4	46.0	8.0
service	8.5	60.9	26.1	4.5
quality	10.8	51.5	32.9	4.8
value for your money	10.4	50.7	34.8	4.2
<b>Golf - overall</b>	60.5	39.5	0.0	0.0
locations	70.0	30.0	0.0	0.0
service	45.2	45.5	6.3	3.0
value for your money	10.7	61.2	26.3	1.7
<b>Activities/Attractions - overall</b>	34.0	51.4	12.5	2.1
exciting	30.8	56.3	10.7	2.1
variety	25.6	47.1	24.4	3.0
service	27.5	54.5	15.1	2.9
value for your money	26.3	43.0	26.3	4.5
<b>Transportation - overall</b>	11.8	40.5	33.2	14.4
convenience	11.4	31.9	39.6	17.1
cleanliness and comfort	12.6	53.1	26.0	8.3
efficiency	9.6	33.2	39.6	17.7
value for your money	10.4	45.2	32.6	11.8
<b>Airports - overall</b>	10.3	57.8	28.3	3.6
signage	9.8	50.8	34.6	4.7
cleanliness and comfort	12.3	58.0	25.4	4.4
ease of getting around	13.5	42.6	38.4	5.5
availability of food	1.4	22.5	61.1	15.0
availability of shopping	5.2	26.3	52.3	16.2
friendliness of workers	13.7	57.5	25.5	3.4
<b>Parks &amp; Beaches - overall</b>	35.2	57.1	6.7	1.0
security	31.9	58.7	7.9	1.6
facility	27.1	52.8	17.1	3.1
cleanliness and comfort	31.1	52.6	15.0	1.3

**Table 3.5.1 Oahu Detailed Satisfaction Ratings by Category – Canada  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	67.6	27.8	4.1	0.6
location	74.0	22.8	3.3	0.0
service	59.9	33.5	5.7	0.9
facility	58.8	33.7	6.7	0.8
cleanliness and comfort	64.2	29.3	5.4	1.1
value for your money	52.2	37.7	7.0	3.1
<b>Restaurant - overall</b>	53.3	40.3	5.9	0.5
location	65.1	30.1	4.5	0.3
variety	58.0	33.2	8.3	0.5
service	54.6	39.0	5.7	0.7
quality	50.8	42.2	6.2	0.9
value for your money	32.8	49.5	15.1	2.6
<b>Shopping - overall</b>	61.6	34.8	3.4	0.2
sufficient shopping places	70.4	27.3	2.3	0.0
locations	68.7	27.5	3.8	0.0
variety	56.7	36.7	6.1	0.5
service	58.3	37.6	3.8	0.4
quality	53.8	41.7	4.1	0.4
value for your money	39.1	48.9	9.5	2.5
<b>Golf - overall</b>	62.9	31.6	3.8	1.6
locations	60.0	33.0	7.1	0.0
service	65.4	30.4	2.6	1.7
value for your money	33.9	43.3	21.3	1.4
<b>Activities/Attractions - overall</b>	64.4	31.2	3.7	0.6
exciting	58.5	37.4	3.2	0.9
variety	66.2	28.5	5.1	0.2
service	62.4	33.4	3.1	1.0
value for your money	41.4	41.4	15.0	2.1
<b>Transportation - overall</b>	69.2	26.1	3.5	1.1
convenience	67.9	27.6	4.0	0.5
cleanliness and comfort	66.6	28.9	4.0	0.4
efficiency	63.8	28.5	6.4	1.3
value for your money	68.4	25.8	4.6	1.3
<b>Airports - overall</b>	54.8	39.7	4.7	0.9
signage	54.9	36.9	7.8	0.4
cleanliness and comfort	59.0	36.4	3.8	0.8
ease of getting around	54.9	34.1	9.6	1.5
availability of food	33.4	38.9	21.6	6.1
availability of shopping	33.4	43.9	18.8	3.9
friendliness of workers	54.9	37.5	6.4	1.2
<b>Parks &amp; Beaches - overall</b>	76.6	20.8	2.3	0.3
security	62.7	31.3	5.4	0.6
facility	64.0	29.2	6.2	0.6
cleanliness and comfort	62.9	29.5	5.7	1.9

**Table 3.5.2 Maui Detailed Satisfaction Ratings by Category – Canada  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	77.3	20.2	2.1	0.3
location	78.6	19.2	1.1	1.1
service	63.6	31.0	4.5	0.9
facility	67.2	28.3	3.2	1.3
cleanliness and comfort	68.4	25.7	5.1	0.8
value for your money	57.3	33.8	8.0	0.9
<b>Restaurant - overall</b>	53.3	39.0	6.7	1.0
location	62.8	33.2	3.8	0.2
variety	55.4	34.8	9.3	0.5
service	60.7	33.7	4.1	1.5
quality	55.3	38.7	4.2	1.7
value for your money	27.3	49.4	19.1	4.3
<b>Shopping - overall</b>	52.0	44.4	3.6	0.0
sufficient shopping places	62.8	32.5	3.7	0.9
locations	57.7	36.6	4.9	0.8
variety	47.9	40.2	10.8	1.2
service	57.6	37.1	5.3	0.0
quality	46.7	48.1	5.1	0.0
value for your money	27.4	56.3	15.1	1.2
<b>Golf - overall</b>	69.2	27.2	2.0	1.7
locations	73.9	23.6	2.5	0.0
service	62.0	33.2	4.8	0.0
value for your money	26.5	44.0	23.6	5.9
<b>Activities/Attractions - overall</b>	61.8	35.7	2.5	0.0
exciting	56.8	40.5	2.6	0.2
variety	65.3	30.0	4.5	0.2
service	61.6	35.4	3.0	0.0
value for your money	36.3	49.1	12.8	1.8
<b>Transportation - overall</b>	51.1	29.8	15.3	3.9
convenience	54.0	28.0	15.4	2.7
cleanliness and comfort	52.4	40.0	7.6	0.0
efficiency	47.5	37.8	13.5	1.2
value for your money	43.7	42.8	11.1	2.4
<b>Airports - overall</b>	49.7	40.9	6.8	2.6
signage	53.1	36.9	6.4	3.6
cleanliness and comfort	49.5	41.7	7.7	1.1
ease of getting around	52.8	37.7	7.9	1.6
availability of food	24.0	43.7	26.0	6.4
availability of shopping	24.6	46.0	23.8	5.6
friendliness of workers	51.3	36.2	9.7	2.8
<b>Parks &amp; Beaches - overall</b>	74.5	22.3	2.9	0.3
security	56.4	34.8	7.4	1.4
facility	59.9	31.8	6.5	1.8
cleanliness and comfort	57.0	33.7	8.2	1.1



**Table 3.5.3 Kauai Detailed Satisfaction Ratings by Category – Canada  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	87.4	11.9	0.7	0.0
location	85.6	14.4	0.0	0.0
service	68.5	29.1	2.4	0.0
facility	81.0	14.7	4.2	0.0
cleanliness and comfort	83.3	12.4	3.6	0.7
value for your money	67.1	26.1	6.9	0.0
<b>Restaurant - overall</b>	52.7	40.6	6.6	0.0
location	60.8	37.6	1.5	0.0
variety	50.2	45.1	4.7	0.0
service	58.2	39.0	2.8	0.0
quality	53.7	40.5	5.2	0.6
value for your money	25.3	52.3	18.3	4.1
<b>Shopping - overall</b>	48.4	44.6	7.0	0.0
sufficient shopping places	57.0	37.8	5.2	0.0
locations	56.4	41.3	2.3	0.0
variety	49.9	40.9	7.3	2.0
service	59.1	34.4	6.5	0.0
quality	49.7	42.8	7.5	0.0
value for your money	26.4	58.9	12.2	2.4
<b>Golf - overall</b>	77.8	22.2	0.0	0.0
locations	81.6	18.4	0.0	0.0
service	68.1	31.9	0.0	0.0
value for your money	34.2	54.3	11.5	0.0
<b>Activities/Attractions - overall</b>	75.0	24.2	0.8	0.0
exciting	71.0	28.4	0.6	0.0
variety	68.5	28.9	2.6	0.0
service	73.6	24.5	1.9	0.0
value for your money	39.1	48.5	11.0	1.4
<b>Transportation - overall</b>	58.7	24.6	13.6	3.2
convenience	52.3	31.8	12.7	3.2
cleanliness and comfort	68.2	28.1	0.0	3.7
efficiency	69.4	27.1	3.5	0.0
value for your money	54.7	38.8	6.5	0.0
<b>Airports - overall</b>	57.8	36.7	5.5	0.0
signage	63.0	29.7	7.3	0.0
cleanliness and comfort	63.7	31.7	4.6	0.0
ease of getting around	64.6	28.6	6.8	0.0
availability of food	37.3	28.9	30.4	3.4
availability of shopping	26.1	50.8	16.7	6.4
friendliness of workers	57.1	35.3	6.6	1.1
<b>Parks &amp; Beaches - overall</b>	83.1	15.2	0.6	1.0
security	64.5	27.6	6.8	1.1
facility	70.8	25.9	3.3	0.0
cleanliness and comfort	64.9	29.6	5.5	0.0

**Table 3.5.4 Kona Detailed Satisfaction Ratings by Category – Canada  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	75.5	19.0	4.6	0.8
location	71.4	19.7	6.3	2.5
service	59.5	33.9	6.0	0.6
facility	65.6	26.3	6.1	2.0
cleanliness and comfort	63.2	27.6	7.3	2.0
value for your money	48.9	38.0	7.1	6.1
<b>Restaurant - overall</b>	36.3	52.0	9.9	1.9
location	54.3	37.2	7.9	0.6
variety	47.1	39.6	11.8	1.5
service	42.8	46.8	9.8	0.6
quality	46.7	38.0	14.1	1.2
value for your money	22.2	54.4	17.3	6.1
<b>Shopping - overall</b>	50.1	43.9	5.0	1.0
sufficient shopping places	54.3	36.3	6.4	2.9
locations	55.8	32.0	11.2	1.0
variety	46.1	40.3	10.6	2.9
service	57.1	31.5	10.4	0.9
quality	42.8	45.0	11.2	1.0
value for your money	23.6	60.2	14.7	1.5
<b>Golf - overall</b>	65.3	34.7	0.0	0.0
locations	70.9	29.1	0.0	0.0
service	75.1	24.9	0.0	0.0
value for your money	31.3	52.3	16.4	0.0
<b>Activities/Attractions - overall</b>	64.8	32.8	2.4	0.0
exciting	55.7	39.6	4.7	0.0
variety	59.2	34.5	6.3	0.0
service	57.7	32.9	9.4	0.0
value for your money	35.9	47.2	14.6	2.4
<b>Transportation - overall</b>	56.3	26.0	14.0	3.7
convenience	50.7	35.0	10.8	3.5
cleanliness and comfort	60.5	24.3	11.8	3.5
efficiency	39.9	37.7	18.9	3.5
value for your money	42.5	32.0	19.6	5.9
<b>Airports - overall</b>	46.4	42.6	9.0	2.0
signage	46.2	42.2	9.7	1.9
cleanliness and comfort	48.0	39.0	8.8	4.2
ease of getting around	48.9	36.2	11.3	3.6
availability of food	25.2	28.6	28.3	17.9
availability of shopping	27.2	34.6	21.3	16.9
friendliness of workers	52.8	36.2	7.3	3.7
<b>Parks &amp; Beaches - overall</b>	68.6	24.2	4.4	2.8
security	45.5	44.3	6.2	3.9
facility	49.6	35.6	12.1	2.7
cleanliness and comfort	48.0	33.1	12.8	6.0

**Table 3.6.1 Oahu Detailed Satisfaction Ratings by Category – Europe  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	67.1	27.2	4.7	1.0
location	74.3	21.0	3.9	0.8
service	61.6	30.1	7.0	1.2
facility	57.3	31.8	9.4	1.4
cleanliness and comfort	66.7	25.0	6.4	1.8
value for your money	53.1	35.1	9.2	2.6
<b>Restaurant - overall</b>	51.8	40.1	7.4	0.6
location	59.1	34.8	5.5	0.5
variety	53.4	36.8	8.5	1.3
service	59.6	35.1	4.9	0.4
quality	54.0	36.0	8.2	1.9
value for your money	42.4	41.8	13.8	2.0
<b>Shopping - overall</b>	65.8	31.6	2.4	0.2
sufficient shopping places	74.6	23.1	2.1	0.2
locations	66.1	31.0	2.7	0.1
variety	58.0	35.3	5.7	1.0
service	65.6	30.6	3.3	0.5
quality	55.8	39.9	3.8	0.5
value for your money	44.8	41.5	11.9	1.8
<b>Golf - overall</b>	64.5	28.1	7.5	0.0
locations	68.8	20.6	10.6	0.0
service	60.9	29.8	9.3	0.0
value for your money	28.3	48.4	23.3	0.0
<b>Activities/Attractions - overall</b>	56.5	39.1	3.7	0.6
exciting	48.4	46.4	4.8	0.4
variety	54.5	37.8	6.5	1.2
service	57.5	38.1	3.9	0.5
value for your money	42.3	44.3	11.2	2.3
<b>Transportation - overall</b>	62.3	32.8	4.0	0.9
convenience	60.5	32.9	6.1	0.6
cleanliness and comfort	56.3	36.6	6.1	1.0
efficiency	62.0	30.8	5.2	2.0
value for your money	61.4	31.1	6.7	0.9
<b>Airports - overall</b>	44.3	46.6	8.1	1.0
signage	47.3	43.3	7.9	1.5
cleanliness and comfort	50.8	42.6	6.0	0.6
ease of getting around	47.6	41.1	9.0	2.2
availability of food	26.2	46.8	22.5	4.5
availability of shopping	26.7	46.5	23.1	3.8
friendliness of workers	52.2	39.9	5.9	2.0
<b>Parks &amp; Beaches - overall</b>	75.0	22.4	1.8	0.8
security	65.8	30.6	2.5	1.1
facility	63.2	31.6	4.3	1.0
cleanliness and comfort	68.2	25.9	5.0	0.9

**Table 3.6.2 Maui Detailed Satisfaction Ratings by Category – Europe  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	72.8	24.9	1.9	0.3
location	66.8	28.7	3.6	0.9
service	64.6	30.7	2.9	1.8
facility	60.0	35.3	3.5	1.2
cleanliness and comfort	65.9	30.6	2.5	1.0
value for your money	46.2	42.0	10.1	1.8
<b>Restaurant - overall</b>	37.7	52.6	8.1	1.5
location	44.9	48.5	5.0	1.6
variety	40.0	41.4	16.9	1.7
service	52.3	41.2	4.6	1.9
quality	41.5	47.5	8.6	2.4
value for your money	26.7	46.5	21.7	5.1
<b>Shopping - overall</b>	43.5	48.4	7.6	0.5
sufficient shopping places	54.0	38.3	6.6	1.1
locations	43.7	47.3	8.5	0.5
variety	43.2	41.8	14.1	0.9
service	53.5	43.5	3.0	0.0
quality	37.4	51.7	10.2	0.7
value for your money	26.5	51.8	18.8	2.9
<b>Golf - overall</b>	65.7	29.5	4.9	0.0
locations	73.1	22.2	4.8	0.0
service	60.9	34.1	4.9	0.0
value for your money	42.9	37.8	18.1	1.2
<b>Activities/Attractions - overall</b>	55.9	37.1	5.0	2.1
exciting	54.2	39.1	5.4	1.4
variety	56.9	35.4	5.9	1.7
service	56.5	36.9	5.9	0.7
value for your money	32.5	48.0	14.4	5.1
<b>Transportation - overall</b>	42.7	40.6	11.6	5.1
convenience	38.1	43.3	12.1	6.5
cleanliness and comfort	42.5	45.5	8.1	3.8
efficiency	38.5	40.9	15.5	5.1
value for your money	39.6	40.2	12.8	7.5
<b>Airports - overall</b>	40.7	52.1	5.6	1.5
signage	41.7	49.1	8.6	0.6
cleanliness and comfort	42.2	47.6	10.2	0.0
ease of getting around	43.2	47.6	8.4	0.8
availability of food	20.2	47.0	28.7	4.1
availability of shopping	18.7	48.9	26.4	5.9
friendliness of workers	46.2	43.8	8.1	1.8
<b>Parks &amp; Beaches - overall</b>	75.8	22.2	1.6	0.4
security	60.4	33.0	5.6	1.0
facility	58.8	34.9	4.6	1.7
cleanliness and comfort	60.6	33.6	5.1	0.7

**Table 3.6.3 Kauai Detailed Satisfaction Ratings by Category – Europe  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	70.3	27.7	1.6	0.5
location	75.2	22.8	2.0	0.0
service	52.2	45.3	1.6	1.0
facility	60.2	33.0	6.3	0.5
cleanliness and comfort	68.3	24.4	5.0	2.3
value for your money	41.8	43.3	13.2	1.7
<b>Restaurant - overall</b>	41.2	44.3	13.2	1.3
location	44.0	44.0	10.3	1.7
variety	27.5	47.5	22.2	2.8
service	42.2	47.1	6.7	4.0
quality	37.1	48.9	10.4	3.7
value for your money	25.4	44.0	26.0	4.5
<b>Shopping - overall</b>	38.2	49.9	10.9	1.0
sufficient shopping places	39.6	47.4	12.0	1.0
locations	34.3	53.3	11.4	1.0
variety	28.0	51.2	18.3	2.5
service	47.7	46.9	5.4	0.0
quality	35.0	57.7	5.9	1.4
value for your money	27.6	51.0	16.4	5.1
<b>Golf - overall</b>	76.7	23.3	0.0	0.0
locations	78.1	16.0	5.9	0.0
service	70.8	22.3	6.9	0.0
value for your money	50.3	16.9	25.9	6.9
<b>Activities/Attractions - overall</b>	70.3	24.8	4.5	0.4
exciting	65.4	29.5	4.1	1.1
variety	58.9	35.1	4.9	1.1
service	60.1	32.9	7.0	0.0
value for your money	31.9	46.4	19.2	2.5
<b>Transportation - overall</b>	48.2	37.9	9.9	4.1
convenience	45.7	37.0	11.9	5.4
cleanliness and comfort	55.7	35.7	6.0	2.6
efficiency	46.1	36.9	15.7	1.2
value for your money	40.0	45.9	11.9	2.2
<b>Airports - overall</b>	43.3	48.2	5.9	2.6
signage	49.5	39.1	8.3	3.1
cleanliness and comfort	42.0	48.8	7.0	2.1
ease of getting around	46.2	41.0	11.4	1.5
availability of food	19.9	37.2	30.1	12.8
availability of shopping	24.3	35.4	26.0	14.3
friendliness of workers	47.6	39.1	9.1	4.2
<b>Parks &amp; Beaches - overall</b>	71.2	24.2	4.7	0.0
security	53.6	39.6	3.2	3.7
facility	49.0	38.6	8.9	3.6
cleanliness and comfort	58.9	26.0	11.1	4.0

**Table 3.6.4 Kona Detailed Satisfaction Ratings by Category – Europe  
[Percentage of Visitors]**

	<b>Very satisfied</b>	<b>Somewhat satisfied</b>	<b>Somewhat dissatisfied</b>	<b>Not satisfied at all</b>
<b>Accommodations - overall</b>	63.9	27.5	8.6	0.0
location	65.0	31.2	2.4	1.5
service	56.9	30.7	7.7	4.7
facility	56.5	35.1	4.9	3.5
cleanliness and comfort	59.5	29.6	9.6	1.4
value for your money	41.0	41.8	11.7	5.5
<b>Restaurant - overall</b>	39.5	54.6	5.9	0.0
location	43.1	49.8	7.1	0.0
variety	37.4	45.4	16.8	0.4
service	45.9	40.6	11.9	1.6
quality	40.0	43.1	15.8	1.1
value for your money	24.4	45.8	23.6	6.2
<b>Shopping - overall</b>	32.4	58.2	9.5	0.0
sufficient shopping places	43.0	40.9	15.0	1.0
locations	35.6	53.2	10.7	0.5
variety	33.7	43.4	17.6	5.2
service	50.5	40.2	9.2	0.0
quality	30.4	54.5	13.8	1.3
value for your money	23.3	44.1	25.6	7.1
<b>Golf - overall</b>	67.9	32.1	0.0	0.0
locations	70.5	29.5	0.0	0.0
service	67.4	32.6	0.0	0.0
value for your money	30.2	49.7	14.4	5.8
<b>Activities/Attractions - overall</b>	58.0	36.2	5.0	0.8
exciting	53.2	42.3	4.4	0.0
variety	52.7	32.7	10.7	4.0
service	41.2	48.8	10.1	0.0
value for your money	34.3	37.3	23.2	5.3
<b>Transportation - overall</b>	36.2	35.9	15.0	12.8
convenience	38.3	35.3	13.0	13.3
cleanliness and comfort	44.2	39.3	14.2	2.3
efficiency	42.5	28.5	16.6	12.4
value for your money	28.9	39.2	18.6	13.2
<b>Airports - overall</b>	46.3	47.1	5.5	1.1
signage	48.8	44.5	6.0	0.7
cleanliness and comfort	46.9	38.4	12.1	2.6
ease of getting around	51.7	42.3	4.8	1.3
availability of food	20.5	40.0	28.5	11.1
availability of shopping	18.4	37.5	36.7	7.3
friendliness of workers	49.3	38.0	9.4	3.3
<b>Parks &amp; Beaches - overall</b>	65.3	30.0	3.7	1.0
security	61.2	33.9	3.8	1.1
facility	55.0	33.4	10.6	1.0
cleanliness and comfort	55.1	33.1	10.0	1.8

## 4. EXPERIENCE AND WILLINGNESS TO RECOMMEND OR REVISIT

# EXPERIENCE AND WILLINGNESS TO RECOMMEND OR REVISIT

## Individual Island Experience

In general the majority of visitors felt that the islands they visited were excellent, in 2005. However, the sentiment towards each island does vary by Major Market Area. Maui was one of the top locations favored by every MMA. Dependably, just over half of visitors found Oahu an excellent experience.

- The islands that the most U.S. West visitors rated excellent were Maui (73.1%), Molokai (75.6%) and Kauai (70.9%).
- U.S. East visitors found excellent experiences on Maui (73.7%) and Kauai (70.4%).
- The Japanese market was not as satisfied as other visitors, with barely half giving a rating of excellent to their island experiences. Their highest rated islands were Maui (57.8%) and Molokai (57.4%).
- Canadian visitors found Kauai (65.3%) and Maui (68%) to more likely offer an excellent experience.
- Europeans found Kauai to be an excellent experience (69.9%). Many also considered their trip to Maui to be excellent (68.2%).

## Overall Rating of Most Recent Vacation to Hawaii

Visitors gave high marks for their overall experience of Hawaii. The majority of visitors rate their most recent trip to Hawaii as excellent.

- Approximately two-thirds (65.9%) of U.S. West visitors found their most recent trip was excellent. Historically, first-time and repeat visitors usually give similar overall ratings. However, in 2005, U.S. West repeat-visitors significantly rated Hawaii lower (65.1%) than first-timers (69.0%).
- U.S. East visitors also rated their trip high (69.8 percent said their trip was excellent). U.S. East Wedding/Honeymoon visitors were a particular segment that said their trip was excellent (87.9%).
- Japanese visitors are less inclined to give a top rating, still 53 percent of the visitors said their trip was excellent. Many Japanese Honeymooners (67.3%) also felt their trip was excellent.
- Close to 63 percent of Canadian visitors gave Hawaii a rating of excellent. Young visitors from Canada were particularly impressed (73.9 percent of young visitors rated their trip excellent).
- Seven out of every ten European visitors found their trip excellent.

## Expectations

Approximately a third of visitors found their Hawaii trip exceeded their expectations. Very few visitors found that their trip did not meet their expectations (less than 5 percent of all visitors).



- U.S. visitors were very pleased, with 35.2 percent finding their trip exceeded expectations. In particular, 42.3 percent of U.S. East visitors stated their trip exceeded expectations. More than half of the U.S. Wedding and Honeymoon visitors (52.2%) said this trip exceeded expectations. Less than 3 percent said that their expectations were not met.
- 31.1 percent of Japanese visitors found their trip exceeded expectations. Most Senior Japanese visitors felt their trip was good and met expectations (74.9%) but few felt the trip exceeded their expectations (19.7%). One could speculate that many Seniors are members of tour groups which provide a carefully planned and prepared travel experience.
- A few Japanese visitors (4.3%) and European visitors (4.2%) found their trip did not meet expectations. However, these results were not significantly different from the overall to warrant any further discussion.
- One third of Canadian visitors found their trip exceeded expectations (34.4%). Many Young Canadians were particularly pleased (45.3 percent found their trip exceeded expectations).
- European visitors, like U.S. East visitors were more likely to find that their expectations were exceeded (41.9 percent of European visitors). More than half of European Wedding/Honeymoon visitors (56.9%) were particularly impressed.
- Even for visitors who have come here before, Hawaii has been able to exceed their expectations. Approximately one-fourth of repeat visitors felt their experiences exceed their expectations. Hawaii must provide a variety of excellent products to continue to exceed the expectations of visitors who have familiarity with the destination.

### **Likelihood to Recommend Hawaii**

When visitors are highly satisfied with their trips they are more likely to recommend Hawaii to their friends and relatives. Beyond tourism ad campaigns, word-of-mouth is an important component to developing more first time visitors to Hawaii and encouraging previous visitors to return.

- Across the board, U.S. West visitors enjoyed Hawaii, with about 90 percent of U.S. West visitors very likely to recommend Hawaii. 92.1 percent of Young visitors were very likely to recommend Hawaii to family and friends. Less than 2 percent said that they are not too likely or not likely at all to recommend Hawaii.
- Most U.S. East visitors (86.9%) were also very likely to recommend Hawaii as a vacation place. Almost all of Wedding/Honeymoon visitors (94.3%) were also very likely to recommend Hawaii.
- About seven out of every ten Japanese visitors were very likely to recommend Hawaii (69.8%) and 26.5 percent were somewhat likely to recommend. Fewer Japanese first timers (66.2%) were very likely to recommend Hawaii than repeat visitors (72.6%).
- 85.2 percent of Canadian visitors were very likely to recommend Hawaii. Many visitors in family groups were very likely to make a recommendation about Hawaii (86.6%).
- Eight out of ten European visitors (79.1%) were very likely to recommend Hawaii as a vacation place to their friends and relatives. Even though most visitors liked Hawaii, fewer European first timers (77.1%) were very likely to recommend Hawaii than repeat

visitors (84.3%). Nearly 5 percent said that they were not too likely to recommend Hawaii.

## **Likelihood to Revisit Hawaii**

Knowing that visitors found their trips so satisfactory that they will return is a good indicator of a successful visitor product.

- Three quarters of U.S. West visitors (74.6%) said they were very likely to return to the islands within the next five years. About half of U.S. East (47.1%), Japanese (49.4%) and Canadian (51.2%) visitors answered that they were very likely to return to Hawaii.
- Likelihood to revisit Hawaii is definitely tied to how often the visitor has been here before. In particular, 62 percent of repeat Japanese visitors would come again in the next five years but only 33.5 percent of first-time visitors would come back. Further, U.S. East visitors also responded in a similar manner, with 34.2 of first-timers expecting to come back and 58.9 percent of repeat travelers returning.
- On the other hand, the majority of U.S. West visitors were likely to revisit Hawaii in the next five years. For first time visitors, 56.2 percent said they were very likely to return and an incredible 79.5 percent of repeat visitors were thinking of Hawaii again for a near term trip.
- Fewer Wedding/Honeymoon visitors were very likely to return soon among the various lifestage segments. Half of the Wedding/Honeymoon visitors from U.S. West (50.7%) were likely to return in the next five years, 34.1 percent of U.S. East visitors, only 29.7 percent of Japanese Wedding/Honeymoon visitors and barely 17.9 percent of Canadian visitors were very likely to revisit Hawaii in the next five years.
- Less than 8 percent of U.S. West visitors said that they were not too likely or not likely at all to return to Hawaii in the next few years. Of those U.S. West visitors who were not likely to return soon, many stated they wanted to just go someplace new (44.1%).
- The reasons given for nearly 22 percent of the U.S. East respondents who will probably not return to Hawaii were that these visitors wanted to go someplace new and the flight was too long.
- Close to 14 percent of the Japanese respondents are not likely to return to the islands within the next five years. Half of these Japanese said that they would rather explore someplace else (52.9%) and 20.3 percent said the flight was too long.
- Wanting to visit a new destination and distance were also popular reasons for Canadian and European visitors who do not plan to revisit Hawaii in the next five years.
- Based on the additional comments from the respondents who were unlikely to return, some U.S. travelers feel Hawaii is expensive. They gave comments such as, “Too expensive even though it's worth the money,” “Lodging prices too expensive,” or “Island hops too expensive.” A few also stated that age or personal finances prevent them from a return visit.
- A few of the Japanese travelers who are unlikely to come do not find Hawaii expensive, instead they say, they do not have enough time, opportunity, or funds to commit to another trip to Hawaii within the next five years. They left comments such as, “I want to visit, but no time,” “I want to visit but don't have enough money,” “Can't take long vacation,” or “This was my honeymoon. I want to visit but budget-wise, I can't visit.”

**Table 4.1 Overall Island Experience [Percentage of Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
<b>Oahu</b>						
Excellent	55.1	53.8	56.6	53.7	54.6	57.5
Above Average	37.8	39.4	36.0	42.5	38.5	35.9
Below Average	6.3	6.2	6.5	3.4	5.7	6.0
Poor	0.8	0.6	1.0	0.3	1.1	0.7
<b>Maui</b>						
Excellent	73.3	73.1	73.7	57.8	68.0	68.2
Above Average	24.5	24.5	24.5	35.1	29.1	28.6
Below Average	1.9	2.3	1.4	6.0	2.8	2.9
Poor	0.2	0.2	0.3	1.0	0.1	0.3
<b>Molokai</b>						
Excellent	65.9	75.6	46.1	57.4	51.8	63.3
Above Average	19.1	14.2	28.9	20.0	37.5	25.6
Below Average	15.0	10.2	24.9	22.6	10.7	11.1
Poor	0.0	0.0	0.0	0.0	0.0	0.0
<b>Lanai</b>						
Excellent	43.1	52.6	36.7	34.0	49.0	47.4
Above Average	48.3	38.0	55.1	66.0	42.6	44.9
Below Average	7.4	6.3	8.2	0.0	6.5	4.4
Poor	1.2	3.1	0.0	0.0	2.0	3.2
<b>Big Island</b>						
Excellent	51.6	54.2	48.8	46.6	43.8	47.7
Above average	40.0	36.2	44.0	44.4	48.0	42.9
Below average	8.1	9.1	7.1	9.0	7.2	8.9
Poor	0.3	0.6	0.0	0.0	1.0	0.5
<b>Hilo</b>						
Excellent	51.4	51.4	51.4	45.4	50.6	44.8
Above Average	38.3	35.6	40.1	46.0	38.1	45.6
Below Average	9.3	11.2	7.9	8.7	9.0	8.5
Poor	1.1	1.8	0.5	0.0	2.2	1.0
<b>Kona</b>						
Excellent	57.6	58.5	56.5	48.9	51.0	54.9
Above Average	36.9	34.9	39.2	42.1	43.2	38.7
Below Average	5.4	6.6	4.0	9.1	5.6	4.7
Poor	0.1	0.0	0.2	0.0	0.2	1.7
<b>Kauai</b>						
Excellent	70.6	70.9	70.4	47.9	65.3	69.9
Above Average	24.5	24.5	24.5	39.9	29.1	26.1
Below Average	3.3	1.8	5.1	12.2	5.0	3.8
Poor	1.5	2.8	0.0	0.0	0.6	0.2

**Table 4.2 Overall Rating of Most Recent Vacation to Hawaii  
[Percentage of Visitors by MMA]**

	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Excellent	67.4	65.9	69.8	53.0	62.7	70.0
Above average	30.0	31.1	28.1	44.6	34.7	27.3
Below average	2.5	2.8	1.9	2.3	2.7	2.6
Poor	0.2	0.2	0.2	0.1	0.0	0.2

**Table 4.2.1: Overall Rating of Most Recent Vacation to Hawaii by Lifestage  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Lifestyle/Lifestage Segments</b>							<b>Visitation Status</b>	
	<b>Wedding / Honeymoon</b>	<b>Family</b>	<b>Young</b>	<b>Middle Age</b>	<b>Seniors</b>	<b>Others</b>	<b>First timers</b>	<b>Repeat visitors</b>	
<b>U.S. Total</b>	Excellent	81.5	69.1	72.1	63.3	67.0	63.1	69.6	66.4
	Above average	17.8	27.8	26.8	34.6	29.5	31.0	28.1	30.8
	Below average	0.7	3.0	0.8	2.0	3.3	4.4	2.3	2.5
	Poor	0.0	0.1	0.2	0.1	0.2	1.5	0.1	0.2
<b>U.S. West</b>	Excellent	74.7	66.9	71.7	60.5	68.0	56.0	69.0	65.1
	Above average	25.3	29.5	27.5	36.6	28.5	35.0	28.5	31.9
	Below average	0.0	3.6	0.8	2.7	3.2	6.5	2.3	2.9
	Poor	0.0	0.0	0.0	0.2	0.2	2.5	0.2	0.2
<b>U.S. East</b>	Excellent	87.9	73.9	72.8	67.5	65.5	73.6	70.0	69.6
	Above average	10.9	24.0	25.7	31.5	30.9	25.1	27.8	28.4
	Below average	1.3	1.7	0.8	1.0	3.4	1.2	2.2	1.6
	Poor	0.0	0.4	0.6	0.0	0.2	0.0	0.0	0.4
<b>Japan</b>	Excellent	67.3	52.3	60.9	49.6	43.3	42.3	53.4	52.7
	Above average	31.9	45.1	36.6	47.9	53.8	57.7	44.1	45.0
	Below average	0.6	2.6	2.4	2.4	2.9	0.0	2.4	2.3
	Poor	0.2	0.0	0.2	0.0	0.0	0.0	0.1	0.0
<b>Canada</b>	Excellent	66.2	62.7	73.9	63.7	57.2	47.7	64.4	61.3
	Above average	33.8	34.5	24.3	33.6	39.8	47.0	32.8	36.2
	Below average	0.0	2.8	1.8	2.7	3.1	5.2	2.8	2.6
	Poor	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Europe</b>	Excellent	74.7	76.2	76.3	69.5	62.4	72.2	69.5	71.3
	Above average	23.0	22.8	22.4	27.8	33.1	24.7	27.7	26.2
	Below average	2.2	0.6	1.3	2.3	4.5	3.0	2.7	2.2
	Poor	0.0	0.5	0.0	0.3	0.0	0.0	0.1	0.4

**Table 4.3 Expectations of Vacation [Percentage of Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Exceeded your expectations	35.2	30.7	42.3	31.1	34.4	41.9
Met your expectations	62.1	66.8	54.9	64.6	62.5	53.9
Did not meet your expectations	2.7	2.5	2.9	4.3	3.0	4.2

**Table 4.3.1: Expectations of Vacation by Lifestage  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

MMA		Lifestyle/Lifestage Segments					Visitation Status	
		Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
U.S. Total	Exceeded expectations	52.2	34.3	48.7	34.1	29.1	49.9	28.5
	Met expectations	46.0	61.8	50.4	63.8	67.7	47.4	68.9
	Did not meet expectations	1.8	3.9	0.9	2.1	3.2	2.7	2.6
U.S. West	Exceeded expectations	36.6	30.0	45.3	31.6	23.6	44.4	27.0
	Met expectations	61.8	66.0	54.3	66.2	74.0	53.4	70.4
	Did not meet expectations	1.6	4.0	0.4	2.2	2.5	2.2	2.6
U.S. East	Exceeded expectations	66.4	43.9	54.4	37.7	37.0	53.6	31.9
	Met expectations	31.6	52.4	44.0	60.4	58.8	43.3	65.4
	Did not meet expectations	2.0	3.7	1.6	1.9	4.2	3.0	2.7
Japan	Exceeded expectations	47.6	27.0	43.1	29.4	19.7	40.1	23.9
	Met expectations	50.7	67.9	54.1	65.5	74.9	54.8	72.3
	Did not meet expectations	1.7	5.0	2.9	5.1	5.5	5.1	3.8
Canada	Exceeded expectations	37.3	30.6	45.3	36.0	29.2	43.5	27.2
	Met expectations	60.4	66.9	52.4	61.0	67.3	52.7	70.4
	Did not meet expectations	2.3	2.5	2.2	2.9	3.5	3.8	2.4
Europe	Exceeded expectations	56.9	41.2	46.5	41.9	32.6	45.7	32.3
	Met expectations	39.4	56.8	50.9	53.8	61.2	49.6	64.7
	Did not meet expectations	3.7	2.0	2.6	4.3	6.2	4.7	3.1

**Table 4.4 Likelihood to Recommend Hawaii as a Vacation Place  
[Percentage of Visitors by MMA]**

	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Very likely	88.8	90.0	86.9	69.8	85.2	79.1
Somewhat likely	9.6	8.7	11.1	26.5	13.0	16.1
Not too likely	1.4	1.2	1.8	3.5	1.7	4.3
Not at all likely	0.2	0.2	0.3	0.3	0.1	0.5

**Table 4.5 Likelihood to Recommend Hawaii by Lifestage – U.S. Total  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	88.8	9.6	1.4	0.2
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	90.9	8.8	0.4	0.0
Family	90.3	7.7	1.8	0.3
Young	89.4	10.0	0.1	0.5
Middle Age	86.6	11.6	1.6	0.2
Seniors	90.2	7.9	1.8	0.1
Others	79.9	19.1	1.0	0.0
Visitation Status				
First timers	86.7	11.4	1.8	0.1
Repeat visitors	89.7	8.8	1.3	0.2

**Table 4.6 Likelihood to Recommend Hawaii by Lifestage – U.S. West  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	90.0	8.7	1.2	0.2
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	87.2	12.8	0.0	0.0
Family	91.6	6.6	1.5	0.3
Young	92.1	7.5	0.0	0.4
Middle Age	87.7	10.9	1.4	
Seniors	91.5	6.8	1.5	0.2
Others	78.6	19.6	1.7	0.0
Visitation Status				
First timers	88.5	9.6	1.8	0.0
Repeat visitors	90.3	8.4	1.1	0.2

**Table 4.7 Likelihood to Recommend Hawaii – U.S. East  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	86.9	11.1	1.8	0.3
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	94.3	5.0	0.8	0.0
Family	87.3	10.0	2.4	0.3
Young	85.1	13.9	0.3	0.6
Middle Age	85.1	12.6	1.8	0.4
Seniors	88.3	9.4	2.3	0.0
Others	81.7	18.3	0.0	0.0
Visitation Status				
First timers	85.4	12.6	1.8	0.2
Repeat visitors	88.3	9.6	1.8	0.3

**Table 4.8 Likelihood to Recommend Hawaii – Japan  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	69.8	26.5	3.5	0.3
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	73.4	25.0	1.6	0.0
Family	69.2	26.9	3.6	0.3
Young	76.5	20.3	3.2	0.0
Middle Age	71.3	24.9	3.3	0.5
Seniors	62.0	32.9	4.8	0.4
Others	66.6	27.7	2.2	3.6
Visitation Status				
First timers	66.2	28.4	4.9	0.5
Repeat visitors	72.6	24.9	2.3	0.1

**Table 4.9 Likelihood to Recommend Hawaii – Canada**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	85.2	13.0	1.7	0.1
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	81.7	18.3	0.0	0.0
Family	86.6	13.2	0.2	0.0
Young	83.4	14.6	2.0	0.0
Middle Age	84.9	13.1	1.9	0.0
Seniors	86.5	11.2	2.0	0.3
Others	78.9	15.5	5.6	0.0
Visitation Status				
First timers	85.2	11.9	2.8	0.0
Repeat visitors	85.2	13.8	0.9	0.2

**Table 4.10 Likelihood to Recommend Hawaii – Europe**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	79.1	16.1	4.3	0.5
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	83.5	14.2	2.2	0.0
Family	83.6	11.1	4.7	0.5
Young	81.2	15.7	3.1	0.0
Middle Age	76.7	17.4	5.2	0.7
Seniors	78.0	16.5	4.7	0.8
Others	67.8	25.2	7.0	0.0
Visitation Status				
First timers	77.1	17.9	4.5	0.5
Repeat visitors	84.3	11.5	3.8	0.4



**Table 4.11 Likelihood to Revisit Hawaii in the Next 5 Years  
[Percentage of Total Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Very likely	63.8	74.6	47.1	49.4	51.2	35.2
Somewhat likely	22.9	17.7	31.0	36.5	26.5	28.4
Not too likely	11.2	6.8	18.0	12.8	18.4	28.8
Not at all likely	2.1	0.9	3.9	1.3	4.0	7.7

**Table 4.12 Reasons for Not Revisiting Hawaii [Percentage of Visitor who are not too likely  
or not at all likely to revisit Hawaii in the next 5 years by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Flight too long	31.2	13.5	40.9	20.3	34.5	56.3
Too commercial/overdeveloped	17.2	27.3	11.7	7.7	13.6	13.3
Too crowded/congested	10.8	14.9	8.5	9.4	7.5	4.2
Not enough value for the price	20.9	20.6	21.1	6.9	21.8	11.8
Want to go someplace new	49.2	44.1	52.1	52.9	58.6	56.1
Other	30.4	35.3	27.7	41.5	26.8	18.4

**Table 4.13 Likelihood to Revisit Hawaii in the Next 5 Years – U.S. Total  
[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Very likely	Somewhat likely	Not too likely	Not at all likely
All Visitors	63.8	22.9	11.2	2.1
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	42.1	34.8	19.3	3.8
Family	62.6	25.2	10.5	1.7
Young	63.6	24.9	9.8	1.7
Middle Age	66.9	21.2	10.4	1.4
Seniors	65.6	20.8	10.6	3.0
Others	50.6	20.9	26.5	2.0
Visitation Status				
First timers	43.2	33.1	19.4	4.2
Repeat visitors	73.4	18.1	7.4	1.1

**Table 4.14 Likelihood to Revisit Hawaii in the Next 5 Years – U.S. West**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	74.6	17.7	6.8	0.9
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	50.7	32.1	17.2	0.0
Family	71.5	21.2	6.2	1.1
Young	73.3	19.5	6.2	1.0
Middle Age	76.6	15.6	7.3	0.6
Seniors	79.1	14.6	5.0	1.3
Others	62.4	18.1	17.5	2.0
Visitation Status				
First timers	56.2	29.2	12.1	2.5
Repeat visitors	79.5	14.5	5.4	0.5

**Table 4.15 Likelihood to Revisit Hawaii in the Next 5 Years – U.S. East**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	47.1	31.0	18.0	3.9
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	34.1	37.3	21.3	7.3
Family	42.7	33.9	20.3	3.1
Young	47.8	33.5	15.9	2.8
Middle Age	52.5	29.6	15.1	2.7
Seniors	46.8	29.4	18.3	5.4
Others	33.2	25.0	39.7	2.1
Visitation Status				
First timers	34.2	35.8	24.5	5.5
Repeat visitors	58.9	26.5	12.0	2.5

**Table 4.16 Likelihood to Revisit Hawaii in the Next 5 Years – Japan**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	49.4	36.5	12.8	1.3
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	29.7	42.2	26.3	1.8
Family	49.9	36.9	12.4	0.8
Young	51.6	36.7	10.9	0.9
Middle Age	57.0	33.3	8.1	1.5
Seniors	52.0	34.9	11.6	1.5
Others	41.1	47.4	6.5	4.9
Visitation Status				
First timers	33.5	44.3	20.1	2.1
Repeat visitors	62.0	30.3	7.1	0.6

**Table 4.17 Likelihood to Revisit Hawaii in the Next 5 Years – Canada**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	51.2	26.5	18.4	4.0
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	17.9	41.6	32.7	7.7
Family	62.4	25.2	11.2	1.1
Young	50.9	27.0	18.0	4.1
Middle Age	51.3	25.3	18.9	4.5
Seniors	49.6	26.4	20.1	3.9
Others	38.0	27.8	23.2	11.0
Visitation Status				
First timers	42.2	27.4	25.2	5.2
Repeat visitors	58.3	25.8	13.0	3.0

**Table 4.18 Likelihood to Revisit Hawaii in the Next 5 Years – Europe**  
**[Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	<b>Very likely</b>	<b>Somewhat likely</b>	<b>Not too likely</b>	<b>Not at all likely</b>
All Visitors	35.2	28.4	28.8	7.7
Lifestyle/Lifestage Segments				
Wedding / Honeymoon	27.4	32.2	29.3	11.1
Family	38.7	34.6	22.6	4.1
Young	37.8	27.0	29.9	5.4
Middle Age	36.0	30.1	27.2	6.7
Seniors	34.7	23.8	31.1	10.4
Others	37.8	26.1	36.0	0.0
Visitation Status				
First timers	27.9	29.8	33.2	9.1
Repeat visitors	53.9	24.6	17.5	4.0

## 5. ACTIVITY PARTICIPATION

## ACTIVITY PARTICIPATION

Visitors to Hawaii are very energetic and try to do many things during their stay. Each major market area has a slightly different pattern of behavior. Their behaviors are due to shared preferences and a result of the difference in visitor characteristics such as length of stay, ratio of repeat to first-timers, age, income and lifestage. In general, U.S. West visitors do not favor sightseeing as much as the other visitors. Japanese visitors are not into certain recreational activities; instead many seek out entertainment and shopping experiences. A higher proportion of Japanese visitors also utilize public transportation than do their U.S. counterparts. U.S. East and Canadian visitors are more likely to participate in cultural activities than visitors from Japan and U.S. West.

### U.S. West

- Almost every U.S. West visitor does some shopping (92.8%) or recreational activity (89.4%). Many U.S. West visitors (71.1%) also involve themselves in a wide variety of cultural activities. The U.S. West visitors are typically self-directed travelers with 73.6 percent doing their own self-guided sightseeing.
- The high share of repeat visitors from U.S. West has a familiarity with the destination so many utilize the convenience of supermarkets (67.6%).
- Oahu visitors are less diverse in their activities; many spend their time shopping (90.9%) particularly in the department stores (57.7%).
- Visitors to Maui are very active. Shopping (91.9%), particularly in designer boutiques (44.9%), is a favorite activity. Many Maui visitors rent cars (82.5%).
- Backpacking, hiking and camping is a popular activity on Kauai (32.6%).
- Three-quarters of Maui (74.6%) and Kauai (74.8%) visitors shopped at a supermarket.
- Kona visitors find themselves snorkeling and scuba diving (45%), much like they do on Maui (57.4%), Lanai (55.2%) and Kauai (54.4%).
- U.S. West visitors do not vary greatly on their activity patterns even if they have come here before. The difference between first-timers and repeat visitors is only slight. First-time U.S. West visitors were more likely to do a tour bus excursion (21.1%), go to the swap meet (38.9%), and do more cultural activities such as visiting historic sites (59%) or attending Polynesian show-luau (58.7%) than their repeat visit counterparts.
- Wedding and Honeymoon visitors were more likely to be active than other lifestage segments. More of these visitors went on the lunch/sunset/dinner cruise (49.9%) and have a fine dining experience (71.4%). Wedding/Honeymooners were also likely to engage in cultural activities like visiting historic sites (67.9%) or attending a luau (55.9%).

### U.S. East

- U.S. East visitors participated in a variety of activities.
- More than half (56%) went to a Polynesian show-luau while staying in Hawaii.
- Almost half (45.5%) tried snorkeling-scuba diving, particularly on Neighbor Island visits.

- As expected, U.S. East visitors were likely to take a tour bus excursion on their first trip to Hawaii. First-timers also did more shopping (96.7%) and were interested in more cultural activities (87.3%). Repeat visitors, on the other hand, were much more likely to rent a car (80%). Seniors were more likely to experience bus tours (32.8%).

## Japan

- Shopping continues to be the number one activity for Japanese travelers (99.1%). One area where Japanese visitors do not frequent is the swap meet (only 12.3%). They do, however, have a liking for convenience stores (80.4%).
- On Oahu, half of the visitors (54%) opt for self-guided sightseeing but on the other islands tour bus excursions are the norm.
- The behaviors of first-time and repeat visitors from Japan are very distinctive. First-timers have a greater propensity to take in lounge acts (29.3%) and board lunch-sunset-dinner cruises (60.9%). On their first visit they also were more likely to do cultural activities (59.3%) such as visiting historic sites (31.1%) and go to a Polynesian show – luau (33.2%).
- Japanese visitors do similar things at any given age or life stage, except for seniors. Seniors were less likely to do recreational activities (69.4%), especially water activities such as swimming or snorkeling.

## Canada

- Canadians are also very active when they come to Hawaii. Almost all visitors do some shopping (97.1%) and take in some sightseeing (94%). Canadians also enjoy high energy activities with half (52%) doing some snorkeling-scuba diving and 43.3 percent running-jogging-fitness walking. Canadians like to go to supermarkets (69.2%) and convenience stores (69.6%).
- Approximately 72 percent rent a car while on Maui, 51.6 percent in Kona, 42.5 percent on Oahu, and 49.6 percent on Kauai. Several Canadians take helicopter or plane tours while on Kauai (26.1%) or Kona (22.2%).
- Repeat visitors do similar things as first-time visitors, but only 44.6 percent of return visitors go to Polynesian shows compared to 60.5 percent of first-timers.

## Europe

- Overall, Europeans try to do a lot while on vacation, mostly because they are predominately first-time visitors (71.6%, see Section 8) and many (36%, see Section 4) do not expect to return in the near future.
- A lot of European visitors do some type of shopping (95.9%). Many visitors, in fact, go to a supermarket on one of the islands (70.6%). Many Europeans also participated in cultural activities (78.3%), particularly historic sites (59.9%) and Polynesian shows (42.7%).
- Only a third (33.7%) used a rental car while on Oahu. 64.1 percent rent a car while on Maui or Kauai.
- First-timers take bus tours (42.7%) while others usually do self-guided sightseeing (76.4%). Seniors make up the bulk of the bus tours (49%).

**Table 5.1 Activity Participation – U.S. Total [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	86.2	82.4	89.0	88.4	87.4	84.6	90.7	64.3
Helicopter or plane tour	11.0	2.3	10.1	11.3	11.2	12.9	20.2	9.2
Boat, submarine, whale watching	30.7	15.2	35.2	28.5	2.3	21.5	18.7	21.0
Tour bus excursion	16.6	22.3	9.6	11.3	21.3	12.1	20.2	8.6
Private limousine/van tour	6.9	5.5	4.8	2.0	4.8	3.2	2.6	17.8
Self-guided	75.7	67.1	73.1	72.3	59.4	68.9	59.6	31.0
<b>All Recreation</b>	90.2	78.5	88.4	82.4	38.4	74.9	56.3	73.3
Swimming-sunbathing-beach	82.6	70.1	80.1	73.6	18.8	59.8	38.6	29.3
Surfing / bodyboarding	23.2	18.5	22.4	17.5	3.2	9.5	5.9	2.3
Snorkeling-scuba diving	48.1	26.5	50.5	45.4	10.1	42.4	19.5	44.3
Jet skiing-parasailing-windsurfing	4.5	2.6	5.5	1.0	0.5	1.0	0.0	0.8
Golf	14.0	5.9	14.6	13.2	2.4	12.7	8.4	11.4
Running-jogging-fitness walking	36.0	29.5	32.9	31.4	10.4	22.5	20.8	6.3
Gym-health spa	15.0	9.7	14.7	11.2	2.4	11.3	3.2	7.4
Backpacking-hiking-camping	22.8	15.5	16.2	27.6	17.2	14.6	12.7	13.6
Sports event or tournament	4.7	5.1	2.4	0.5	0.2	3.3	0.0	0.8
<b>All Entertainment</b>	79.4	69.7	77.6	67.1	26.0	57.5	50.6	31.3
Lunch-sunset-dinner-evening cruise	31.3	25.9	29.7	24.7	10.6	20.7	22.6	23.0
Lounge act-stage show	29.2	25.2	29.3	16.4	2.1	14.1	12.5	2.6
Nightclub-dancing-bar-karaoke	16.3	17.1	11.5	9.6	2.8	8.3	11.8	4.3
Fine dining	64.4	52.7	64.1	52.5	16.6	43.9	18.7	14.3
<b>All Shopping</b>	93.2	89.7	88.9	82.7	47.8	75.3	46.1	15.2
Department stores	48.6	52.1	32.9	25.2	15.5	28.2	2.6	0.0
Designer boutiques	40.1	28.7	40.8	32.7	8.8	28.7	4.6	1.4
Hotel stores	48.1	49.2	38.1	28.8	6.0	27.8	14.1	3.0
Swap meet	32.6	33.2	17.9	21.5	9.8	17.5	14.6	0.0
Discount/outlet stores	36.1	31.1	31.6	26.5	13.4	26.4	0.0	1.9
Supermarkets	63.4	38.2	64.7	60.7	22.5	44.0	34.5	4.0
Convenience stores	60.7	60.7	53.7	44.5	20.3	37.7	21.4	6.6
Duty free	7.0	8.5	3.4	2.0	2.1	2.5	2.2	0.0
<b>All Culture</b>	75.6	71.5	71.1	64.9	42.8	60.2	51.9	8.7
Historic site	56.5	57.0	39.7	47.2	36.9	50.7	45.9	7.7
Museum-art gallery	28.5	22.9	28.5	18.3	12.9	16.6	9.0	1.5
Polynesian show-luau	45.3	38.5	41.4	28.6	2.4	21.7	3.8	1.5
Art-craft fair	17.2	7.7	16.8	22.6	5.8	11.5	7.1	1.5
Festival	5.4	4.6	5.1	2.1	0.2	2.2	0.0	1.0
<b>All Transportation</b>	86.9	82.5	83.7	80.0	45.5	69.7	38.4	13.9
Trolley	6.9	9.7	2.7	0.7	0.4	1.3	0.0	2.3
Public Bus	13.2	22.7	3.0	1.7	3.0	1.6	0.0	1.0
Taxi-limousine	18.5	26.8	7.2	4.0	3.4	6.6	7.0	4.0
Rental Car	75.2	55.4	78.4	76.9	39.6	64.8	35.6	7.8
<b>Meeting</b>	9.4	11.0	5.8	2.9	3.1	3.9	4.4	1.3
<b>Convention</b>	6.7	8.4	2.5	2.8	0.4	2.3	0.0	0.0
<b>Incentive/reward</b>	3.8	1.9	3.9	2.2	1.8	4.6	0.0	1.3



**Table 5.2 Activity Participation – U.S. West [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	82.9	78.4	86.6	85.0	85.2	81.9	86.5	49.8
Helicopter or plane tour	7.5	1.8	7.4	5.7	9.3	6.4	19.3	6.3
Boat, submarine, whale watching	27.3	13.8	33.5	28.9	3.0	18.8	27.2	17.2
Tour bus excursion	12.1	18.0	4.4	5.7	10.5	5.3	19.3	6.3
Private limousine/van tour	5.7	4.8	4.3	1.7	6.6	3.1	3.8	4.0
Self-guided	73.6	67.6	73.9	73.9	66.6	70.5	51.3	22.3
<b>All Recreation</b>	89.4	79.3	91.7	89.9	43.0	80.6	65.0	86.5
Swimming-sunbathing-beach	82.2	70.9	83.2	83.3	21.6	68.1	44.5	36.5
Surfing / bodyboarding	26.0	22.3	27.7	24.3	6.8	12.3	6.8	0.0
Snorkeling-scuba diving	49.8	28.0	57.4	54.4	15.1	45.0	20.8	55.2
Jet skiing-parasailing-windsurfing	4.9	3.2	7.3	0.5	0.4	0.9	0.0	0.0
Golf	14.1	6.3	15.0	14.6	3.7	16.6	12.2	17.3
Running-jogging-fitness walking	36.5	30.5	38.0	37.2	12.4	25.0	24.0	13.8
Gym-health spa	13.8	10.1	13.1	12.9	2.7	12.9	2.9	9.9
Backpacking-hiking-camping	21.8	14.7	17.1	32.6	20.9	15.6	12.7	3.8
Sports event or tournament	4.6	5.6	2.2	0.5	0.5	4.4	0.0	0.0
<b>All Entertainment</b>	78.4	70.0	80.8	71.7	32.2	64.5	48.6	30.3
Lunch-sunset-dinner-evening cruise	29.5	26.7	28.9	24.9	12.5	20.5	14.7	11.9
Lounge act-stage show	26.4	24.4	29.6	18.1	2.7	16.0	15.1	0.0
Nightclub-dancing-bar-karaoke	15.6	18.0	11.1	12.5	3.6	8.7	14.9	4.3
Fine dining	63.5	54.8	67.7	54.8	24.1	50.5	21.2	22.8
<b>All Shopping</b>	92.8	90.9	91.9	88.0	50.9	80.2	54.4	22.4
Department stores	48.8	57.7	36.0	29.9	20.6	28.8	3.8	0.0
Designer boutiques	40.2	29.7	44.9	39.3	11.1	33.9	6.7	0.0
Hotel stores	44.4	48.7	37.1	30.5	6.8	31.5	13.3	7.4
Swap meet	31.0	34.3	19.5	23.8	12.3	22.0	17.1	0.0
Discount/outlet stores	34.8	32.4	31.1	29.9	14.3	26.3	0.0	2.7
Supermarkets	67.6	43.7	74.6	74.8	29.2	50.9	44.7	9.9
Convenience stores	60.4	63.7	57.0	49.5	23.5	39.9	28.0	6.8
Duty free	6.9	10.6	3.4	2.9	0.6	1.9	0.0	0.0
<b>All Culture</b>	71.1	65.4	69.3	69.0	43.7	63.9	60.5	8.1
Historic site	51.9	50.1	39.1	48.8	36.7	53.0	54.1	8.1
Museum-art gallery	28.0	22.7	32.0	19.4	17.5	19.5	13.1	0.0
Polynesian show-luau	38.4	34.8	36.3	33.5	3.5	24.2	0.0	0.0
Art-craft fair	17.3	8.0	17.7	29.6	4.8	12.6	10.3	3.7
Festival	5.6	4.8	6.2	2.7	0.4	3.0	0.0	0.0
<b>All Transportation</b>	86.2	84.1	86.4	86.8	54.3	74.6	39.1	16.2
Trolley	6.4	9.9	3.0	0.5	0.4	1.5	0.0	5.7
Public Bus	10.6	20.9	2.2	1.2	1.7	1.1	0.0	0.0
Taxi-limousine	16.7	26.4	7.3	3.8	5.4	9.0	6.2	3.1
Rental Car	76.0	58.2	82.5	84.1	48.3	69.7	39.1	10.5
<b>Meeting</b>	10.7	13.4	7.5	3.6	6.1	5.6	6.4	0.0
<b>Convention</b>	5.3	6.9	1.6	3.6	0.5	2.0	0.0	0.0
<b>Incentive/reward</b>	3.4	1.5	2.5	2.5	0.0	4.7	0.0	0.0

**Table 5.3 Activity Participation – U.S. East [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	91.4	86.9	92.2	92.6	89.1	87.5	100.0	74.1
Helicopter or plane tour	16.4	2.8	13.6	18.1	12.5	19.6	22.2	11.1
Boat, submarine, whale watching	35.8	16.8	37.3	28.1	1.7	24.2	0.0	23.6
Tour bus excursion	23.7	26.8	16.3	18.1	29.4	19.2	22.2	10.1
Private limousine/van tour	8.7	6.3	5.4	2.5	3.4	3.2	0.0	27.1
Self-guided	79.0	66.6	72.1	70.4	54.1	67.2	77.8	36.8
<b>All Recreation</b>	91.3	77.6	84.1	73.4	35.0	69.0	37.5	64.4
Swimming-sunbathing-beach	83.3	69.2	76.1	61.8	16.7	51.0	25.5	24.5
Surfing / bodyboarding	18.8	14.5	15.4	9.3	0.5	6.6	3.7	3.8
Snorkeling-scuba diving	45.5	24.9	41.4	34.6	6.3	39.7	16.5	36.9
Jet skiing-parasailing-windsurfing	3.8	1.9	3.2	1.6	0.5	1.2	0.0	1.3
Golf	13.7	5.6	14.0	11.5	1.5	8.7	0.0	7.5
Running-jogging-fitness walking	35.1	28.4	26.4	24.5	8.9	19.9	13.8	1.3
Gym-health spa	16.8	9.2	16.8	9.2	2.2	9.7	3.7	5.7
Backpacking-hiking-camping	24.4	16.4	15.0	21.6	14.5	13.6	12.6	20.2
Sports event or tournament	4.8	4.5	2.6	0.5	0.0	2.1	0.0	1.3
<b>All Entertainment</b>	81.1	69.3	73.4	61.5	21.4	50.2	55.0	32.0
Lunch-sunset-dinner-evening cruise	34.0	25.1	30.7	24.4	9.1	20.9	39.8	30.4
Lounge act-stage show	33.7	26.1	29.0	14.4	1.7	12.2	7.0	4.3
Nightclub-dancing-bar-karaoke	17.4	16.1	12.1	6.0	2.2	7.8	5.1	4.3
Fine dining	65.7	50.4	59.4	49.8	11.1	37.0	13.3	8.7
<b>All Shopping</b>	94.0	88.5	85.0	76.3	45.5	70.1	27.9	10.3
Department stores	48.3	46.0	28.9	19.4	11.6	27.5	0.0	0.0
Designer boutiques	39.8	27.6	35.6	24.7	7.0	23.4	0.0	2.4
Hotel stores	53.7	49.8	39.3	26.7	5.4	23.8	15.8	0.0
Swap meet	35.2	32.0	15.8	18.7	7.8	12.7	9.0	0.0
Discount/outlet stores	38.2	29.7	32.4	22.4	12.6	26.6	0.0	1.3
Supermarkets	56.8	32.3	51.9	43.7	17.6	36.9	12.0	0.0
Convenience stores	61.2	57.5	49.4	38.4	17.9	35.5	6.8	6.6
Duty free	7.1	6.1	3.4	0.9	3.3	3.2	7.0	0.0
<b>All Culture</b>	82.5	78.0	73.5	60.1	42.2	56.3	33.1	9.0
Historic site	63.7	64.5	40.6	45.3	37.1	48.3	28.0	7.4
Museum-art gallery	29.3	23.2	23.9	17.0	9.5	13.5	0.0	2.5
Polynesian show-luau	56.0	42.6	48.1	22.6	1.6	19.1	12.0	2.5
Art-craft fair	17.1	7.4	15.6	14.0	6.5	10.3	0.0	0.0
Festival	5.2	4.5	3.6	1.3	0.0	1.4	0.0	1.6
<b>All Transportation</b>	88.0	80.8	80.3	71.7	38.9	64.5	36.8	12.4
Trolley	7.6	9.5	2.2	0.9	0.4	1.0	0.0	0.0
Public Bus	17.3	24.7	4.1	2.4	3.9	2.2	0.0	1.6
Taxi-limousine	21.1	27.2	7.0	4.2	1.9	4.2	8.9	4.7
Rental Car	74.0	52.3	73.1	68.3	33.1	59.8	27.9	6.1
<b>Meeting</b>	7.3	8.4	3.7	2.1	0.8	2.2	0.0	2.2
<b>Convention</b>	9.0	9.9	3.5	1.8	0.4	2.6	0.0	0.0
<b>Incentive/reward</b>	4.4	2.3	5.8	1.9	3.1	4.5	0.0	2.2

**Table 5.4 Activity Participation – Japan [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	91.9	88.5	91.7	94.8	91.4	90.8	70.8	100.0
Helicopter or plane tour	15.0	3.0	5.6	68.9	7.7	58.6	30.0	0.0
Boat, submarine, whale watching	18.7	16.6	12.7	10.5	2.5	6.4	0.0	0.0
Tour bus excursion	44.9	37.3	43.2	68.9	68.1	58.1	30.0	0.0
Private limousine/van tour	16.8	14.3	9.7	3.7	5.4	14.4	40.8	0.0
Self-guided	55.8	54.0	36.9	22.7	16.3	23.4	0.0	100.0
<b>All Recreation</b>	83.1	79.7	53.8	30.8	16.4	50.6	70.8	84.0
Swimming-sunbathing-beach	71.5	68.0	41.4	27.1	7.0	37.8	40.8	84.0
Surfing / bodyboarding	9.0	8.6	4.4	1.5	0.6	0.9	0.0	0.0
Snorkeling-scuba diving	19.5	18.0	10.4	10.4	2.7	9.1	0.0	23.3
Jet skiing-parasailing-windsurfing	4.9	4.9	1.1	0.6	0.0	0.3	0.0	0.0
Golf	8.4	6.2	10.8	5.3	2.2	10.9	0.0	67.9
Running-jogging-fitness walking	20.0	18.7	9.6	7.9	3.5	12.2	0.0	23.3
Gym-health spa	7.5	6.6	3.5	1.6	1.2	6.3	0.0	0.0
Backpacking-hiking-camping	7.7	6.7	3.8	2.6	3.0	3.3	0.0	0.0
Sports event or tournament	2.5	2.2	1.8	0.0	0.5	0.4	30.0	0.0
<b>All Entertainment</b>	88.5	88.4	64.6	53.0	40.7	62.3	100.0	76.7
Lunch-sunset-dinner-evening cruise	49.8	49.7	18.9	16.3	10.4	18.4	40.8	16.0
Lounge act-stage show	24.0	23.0	8.0	4.5	2.5	8.5	0.0	0.0
Nightclub-dancing-bar-karaoke	5.5	5.2	0.9	3.2	0.3	1.5	0.0	0.0
Fine dining	77.1	76.5	56.1	45.8	35.5	56.3	100.0	76.7
<b>All Shopping</b>	99.1	99.5	64.9	39.4	28.8	64.2	30.0	0.0
Department stores	54.3	55.8	3.8	1.5	3.4	5.8	0.0	0.0
Designer boutiques	64.1	64.9	18.4	1.2	2.2	11.9	0.0	0.0
Hotel stores	51.2	48.7	26.9	13.7	9.4	32.1	0.0	0.0
Swap meet	12.3	11.7	4.3	7.4	3.2	3.0	30.0	0.0
Discount/outlet stores	40.8	40.3	14.5	7.6	4.6	9.6	0.0	0.0
Supermarkets	59.5	56.6	35.4	25.8	13.2	26.0	0.0	0.0
Convenience stores	80.4	81.0	31.7	16.9	10.8	25.2	0.0	0.0
Duty free	82.3	83.8	9.1	2.3	4.5	19.0	0.0	0.0
<b>All Culture</b>	53.1	50.1	26.9	33.7	21.6	30.7	0.0	0.0
Historic site	26.0	23.3	16.2	24.7	17.2	19.6	0.0	0.0
Museum-art gallery	17.5	16.4	5.7	5.6	4.4	6.5	0.0	0.0
Polynesian show-luau	25.7	24.2	8.3	9.5	2.7	9.0	0.0	0.0
Art-craft fair	2.8	2.6	1.5	3.2	0.0	0.8	0.0	0.0
Festival	5.4	5.1	2.3	0.7	1.2	0.7	0.0	0.0
<b>All Transportation</b>	92.9	92.9	52.7	29.0	16.0	40.6	40.8	16.2
Trolley	65.3	67.4	7.9	0.0	1.2	6.9	0.0	0.0
Public Bus	24.9	25.5	4.4	0.7	0.6	2.3	0.0	0.0
Taxi-limousine	44.6	43.3	21.2	8.7	4.7	17.3	40.8	0.0
Rental Car	17.0	12.9	27.1	22.9	9.5	18.3	0.0	16.2
<b>Meeting</b>	2.3	1.9	0.4	1.0	0.3	1.5	0.0	0.0
<b>Convention</b>	1.1	0.9	0.2	0.0	0.9	0.4	0.0	0.0
<b>Incentive/reward</b>	3.2	3.1	0.5	0.5	0.3	1.9	0.0	0.0

**Table 5.5 Activity Participation – Canada [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	94.0	89.6	91.9	89.4	89.2	87.1	86.5	71.0
Helicopter or plane tour	15.9	3.5	7.8	26.1	11.2	22.2	10.7	12.9
Boat, submarine, whale watching	34.7	17.5	32.2	23.1	2.9	19.1	0.0	18.0
Tour bus excursion	27.9	33.8	18.6	26.1	33.1	21.4	10.7	9.6
Private limousine/van tour	9.9	6.6	6.6	7.1	8.0	6.0	25.1	12.5
Self-guided	81.9	69.3	72.0	57.0	47.0	61.6	50.7	31.9
<b>All Recreation</b>	92.8	83.5	85.3	70.3	37.1	66.7	39.3	56.3
Swimming-sunbathing-beach	87.2	77.2	76.2	57.6	17.3	53.1	13.0	21.4
Surfing / bodyboarding	30.9	19.3	29.1	15.8	3.6	11.4	6.1	4.1
Snorkeling-scuba diving	52.0	30.9	46.3	33.8	7.9	39.1	11.4	24.8
Jet skiing-parasailing-windsurfing	4.0	2.6	3.1	0.4	1.1	2.2	6.1	0.0
Golf	16.3	7.1	17.0	12.3	1.1	9.7	8.2	12.8
Running-jogging-fitness walking	43.3	34.2	37.2	27.3	13.4	22.7	30.7	11.5
Gym-health spa	9.8	5.7	8.3	5.7	1.0	5.3	0.0	4.6
Backpacking-hiking-camping	21.2	14.8	13.7	15.7	18.3	14.1	13.3	1.4
Sports event or tournament	7.9	7.2	4.1	1.3	1.3	5.3	0.0	3.3
<b>All Entertainment</b>	79.4	71.9	69.8	49.6	16.2	45.0	28.0	21.1
Lunch-sunset-dinner-evening cruise	36.4	31.9	29.8	22.4	7.3	21.9	14.9	16.8
Lounge act-stage show	36.2	31.1	25.2	20.2	3.0	12.6	8.9	3.8
Nightclub-dancing-bar-karaoke	15.1	15.4	8.4	7.6	1.2	5.6	0.0	0.0
Fine dining	58.7	50.2	48.1	29.8	9.3	28.4	7.3	8.2
<b>All Shopping</b>	97.1	94.1	87.8	71.9	45.7	69.0	33.9	27.1
Department stores	66.6	63.6	45.7	36.2	21.8	36.0	10.3	10.4
Designer boutiques	44.2	34.1	41.2	24.4	5.5	17.6	0.0	5.9
Hotel stores	44.5	47.7	27.9	15.8	2.5	16.2	4.2	4.4
Swap meet	42.6	40.4	25.9	17.5	7.4	16.7	10.0	0.0
Discount/outlet stores	46.4	42.1	36.4	25.8	14.1	28.2	10.3	7.6
Supermarkets	69.2	48.7	63.1	43.0	13.0	37.3	14.2	1.3
Convenience stores	69.6	69.6	53.4	35.7	18.3	37.0	17.9	7.9
Duty free	10.5	10.2	5.5	5.3	0.4	3.3	6.1	2.8
<b>All Culture</b>	81.9	74.9	67.9	53.9	36.3	54.8	48.5	14.4
Historic site	61.7	56.5	45.3	39.4	31.2	46.1	37.3	7.0
Museum-art gallery	30.4	22.2	25.2	11.3	9.9	17.8	7.0	8.6
Polynesian show-luau	51.8	47.6	33.4	22.6	1.9	17.8	3.0	0.0
Art-craft fair	18.7	10.4	15.6	16.4	3.4	9.1	10.6	5.4
Festival	5.7	5.4	2.8	1.6	1.2	2.2	0.0	0.0
<b>All Transportation</b>	90.9	85.2	79.8	56.2	32.5	57.1	32.7	28.4
Trolley	12.5	17.6	3.3	0.6	0.2	0.5	0.0	4.3
Public Bus	28.4	42.5	3.2	2.0	2.8	4.2	0.0	14.1
Taxi-limousine	28.5	37.4	10.9	7.4	3.8	4.8	0.0	5.5
Rental Car	68.4	42.5	72.2	49.6	27.0	51.6	32.7	11.9
<b>Meeting</b>	3.7	2.8	3.2	0.2	0.4	2.3	0.0	3.0
<b>Convention</b>	4.1	4.1	1.4	1.8	0.2	2.1	0.0	3.0
<b>Incentive/reward</b>	3.0	1.7	2.9	2.5	1.4	3.5	0.0	4.8

**Table 5.6 Activity Participation – Europe [Percentage of Visitors by Island]**

	STATE	OAHU	MAUI	KAUAI	HILO	KONA	MOLOKAI	LANAI
<b>All Sightseeing</b>	93.4	90.5	91.7	91.7	91.7	90.4	92.3	82.2
Helicopter or plane tour	17.4	5.9	7.6	19.0	9.7	22.4	4.9	29.2
Boat, submarine, whale watching	31.5	18.8	32.0	16.7	3.3	13.6	7.7	10.7
Tour bus excursion	37.2	38.5	19.3	19.0	25.7	22.0	4.9	29.2
Private limousine/van tour	16.0	12.3	13.0	12.0	9.8	10.8	30.4	11.1
Self-guided	68.8	59.6	66.8	66.9	60.6	67.5	67.0	40.0
<b>All Recreation</b>	91.3	85.5	81.0	76.8	38.4	70.7	68.5	43.4
Swimming-sunbathing-beach	87.5	82.9	73.8	70.6	21.8	63.5	65.8	41.8
Surfing / bodyboarding	20.0	15.8	16.4	11.1	2.4	6.7	3.1	2.5
Snorkeling-scuba diving	39.2	26.3	38.0	29.6	7.6	34.5	39.5	19.7
Jet skiing-parasailing-windsurfing	2.8	1.5	3.5	0.2	0.2	0.6	0.0	0.0
Golf	5.5	2.8	5.6	3.8	0.2	4.4	0.0	1.5
Running-jogging-fitness walking	21.2	16.8	14.6	13.2	4.5	11.8	10.8	5.4
Gym-health spa	9.1	6.2	6.7	4.2	1.4	6.9	0.0	0.0
Backpacking-hiking-camping	16.5	7.9	15.8	21.5	24.2	14.4	11.6	7.2
Sports event or tournament	4.5	3.7	2.3	0.4	0.1	3.7	0.0	0.0
<b>All Entertainment</b>	79.0	74.5	62.9	53.2	21.6	51.6	41.3	24.0
Lunch-sunset-dinner-evening cruise	40.8	36.6	31.6	26.8	14.3	29.9	26.2	17.2
Lounge act-stage show	25.8	22.3	13.6	11.9	1.3	8.8	2.0	1.7
Nightclub-dancing-bar-karaoke	21.7	23.7	9.6	5.8	2.4	7.9	21.2	2.4
Fine dining	55.3	49.0	42.5	32.8	8.8	33.4	18.1	7.5
<b>All Shopping</b>	95.9	94.6	85.9	74.8	55.3	76.7	74.0	29.8
Department stores	70.5	71.8	43.1	31.3	25.6	33.1	3.2	5.8
Designer boutiques	40.1	36.8	27.7	15.1	5.6	15.6	6.4	0.0
Hotel stores	49.3	48.0	25.0	15.8	3.7	23.0	0.0	5.1
Swap meet	26.0	24.7	11.5	8.4	6.1	9.1	9.1	2.4
Discount/outlet stores	34.4	32.7	21.2	10.6	8.1	16.3	11.6	8.4
Supermarkets	70.6	61.0	61.3	55.7	36.5	54.4	47.4	11.4
Convenience stores	50.8	51.9	31.1	25.3	14.0	21.1	20.2	0.0
Duty free	17.1	18.1	7.4	4.3	2.3	5.1	0.0	0.0
<b>All Culture</b>	78.3	73.8	55.3	52.8	37.4	59.7	39.7	9.4
Historic site	59.9	56.5	37.7	38.4	31.8	50.2	35.2	9.4
Museum-art gallery	28.0	23.1	17.4	12.9	12.6	14.3	6.1	3.9
Polynesian show-luau	42.7	37.6	23.6	21.4	1.9	14.7	4.5	2.4
Art-craft fair	11.5	7.1	9.1	8.6	2.1	4.7	2.7	0.0
Festival	6.2	6.3	2.5	0.5	0.6	1.6	0.0	0.0
<b>All Transportation</b>	90.7	87.6	79.9	71.9	53.4	72.3	58.0	22.4
Trolley	19.2	23.1	5.3	0.5	1.2	2.6	0.0	0.0
Public Bus	38.4	45.7	10.4	3.1	2.0	5.8	0.0	3.3
Taxi-limousine	39.4	40.4	18.0	10.9	4.0	12.6	6.3	10.8
Rental Car	52.1	33.7	64.1	64.1	47.9	62.5	55.1	10.2
<b>Meeting</b>	4.4	3.4	1.6	1.6	1.1	2.4	0.0	0.0
<b>Convention</b>	3.9	3.9	0.7	0.5	0.8	1.3	0.0	0.0
<b>Incentive/reward</b>	1.8	0.2	1.2	0.8	0.2	3.7	0.0	0.0

**Table 5.7 Activity Participation by Lifestage – U.S. Total [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	92.5	86.7	85.4	83.2	88.7	91.8	83.8
Helicopter or plane tour	19.0	10.7	7.8	7.9	14.6	15.8	8.8
Boat, submarine, whale watching	41.9	36.3	31.4	29.1	27.8	36.6	28.4
Tour bus excursion	15.7	13.0	14.7	13.8	21.9	27.9	11.1
Private limousine/van tour	9.9	8.1	5.6	5.4	8.1	10.0	5.6
Self-guided	84.3	74.3	75.7	76.6	74.9	77.6	75.0
<b>All Recreation</b>	97.3	98.3	93.4	90.8	83.4	91.0	90.4
Swimming-sunbathing-beach	89.6	96.0	88.9	82.6	71.8	83.6	82.7
Surfing / bodyboarding	20.2	43.4	26.0	23.9	10.1	20.1	25.1
Snorkeling-scuba diving	67.7	64.3	60.8	47.8	31.7	53.5	46.3
Jet skiing-parasailing-windsurfing	11.1	7.5	5.0	2.5	3.1	4.4	4.3
Golf	14.4	14.2	9.1	13.0	17.1	11.2	15.3
Running-jogging-fitness walking	27.3	40.9	31.3	37.4	35.6	29.8	39.3
Gym-health spa	23.4	19.6	14.8	16.1	9.9	13.8	15.5
Backpacking-hiking-camping	35.5	21.8	37.3	27.1	11.2	26.4	21.2
Sports event or tournament	3.0	4.2	5.4	5.3	4.6	4.7	4.8
<b>All Entertainment</b>	96.7	77.5	81.5	78.2	79.5	80.9	79.1
Lunch-sunset-dinner-evening cruise	50.8	27.5	34.0	29.3	31.9	36.4	29.0
Lounge act-stage show	31.5	32.0	25.5	26.6	32.1	35.6	26.6
Nightclub-dancing-bar-karaoke	21.8	13.3	29.9	17.9	10.1	19.1	15.0
Fine dining	76.1	60.9	66.2	65.2	64.3	62.6	65.6
<b>All Shopping</b>	96.7	95.4	96.3	92.9	91.7	95.7	92.7
Department stores	40.6	49.2	52.2	48.8	48.8	47.9	49.4
Designer boutiques	51.6	42.4	42.9	40.5	35.8	40.8	39.9
Hotel stores	59.3	48.5	41.8	50.1	47.4	49.5	47.7
Swap meet	33.2	31.7	42.2	33.8	27.9	36.7	30.7
Discount/outlet stores	29.0	36.4	28.5	37.6	39.0	37.3	35.8
Supermarkets	67.5	71.1	63.1	61.9	61.0	57.0	66.9
Convenience stores	64.6	62.1	66.2	64.5	54.3	59.8	61.7
Duty free	5.5	8.5	7.6	8.6	4.5	8.4	6.4
<b>All Culture</b>	87.9	79.4	73.8	73.8	74.5	84.3	71.8
Historic site	62.0	57.5	54.0	56.6	56.6	65.1	52.8
Museum-art gallery	32.2	31.3	20.4	27.6	30.2	24.7	30.1
Polynesian show-luau	65.7	49.9	45.3	44.0	41.6	64.4	36.9
Art-craft fair	18.0	16.1	12.8	19.4	17.8	14.3	18.7
Festival	5.8	7.6	4.1	4.7	5.3	4.6	5.8
<b>All Transportation</b>	94.6	87.0	83.0	89.4	85.8	86.9	87.4
Trolley	7.5	6.1	6.3	7.2	7.4	9.4	5.8
Public Bus	6.9	9.1	14.4	13.1	15.7	18.6	10.5
Taxi-limousine	17.5	13.4	22.8	23.4	15.5	20.8	17.7
Rental Car	90.6	79.8	68.1	76.2	73.3	70.4	77.9
<b>Meeting</b>	3.6	6.0	6.6	14.5	8.6	6.0	11.1
<b>Convention</b>	0.8	5.7	3.6	10.3	5.8	6.9	6.6
<b>Incentive/reward</b>	5.1	3.2	3.7	4.7	3.2	4.1	3.7

**Table 5.8 Activity Participation by Lifestage – U.S. West [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	89.8	83.5	84.5	79.7	84.6	88.7	81.5
Helicopter or plane tour	17.2	6.7	6.7	6.4	8.5	8.6	7.2
Boat, submarine, whale watching	40.4	33.0	27.1	27.0	23.4	33.1	26.3
Tour bus excursion	8.3	12.0	13.5	9.5	14.1	21.1	9.4
Private limousine/van tour	10.4	8.0	5.3	4.4	5.6	8.3	5.2
Self-guided	78.0	72.5	76.8	72.6	73.8	75.9	73.1
<b>All Recreation</b>	98.6	98.4	93.3	89.4	81.3	89.9	89.8
Swimming-sunbathing-beach	83.6	96.0	88.7	81.3	71.0	82.7	82.5
Surfing / bodyboarding	19.0	46.2	27.8	27.4	10.9	23.6	27.1
Snorkeling-scuba diving	64.4	63.6	64.2	50.0	32.8	61.5	47.3
Jet skiing-parasailing-windsurfing	9.4	8.4	5.3	3.1	3.6	4.6	5.0
Golf	11.7	13.6	8.8	13.3	17.9	10.8	14.9
Running-jogging-fitness walking	26.0	40.8	32.0	36.7	37.1	29.1	38.8
Gym-health spa	18.3	16.4	13.0	16.0	9.6	12.9	14.1
Backpacking-hiking-camping	36.8	20.2	40.4	25.7	8.9	28.3	20.1
Sports event or tournament	4.9	4.2	5.5	5.4	3.9	4.0	4.9
<b>All Entertainment</b>	96.1	75.5	81.0	75.8	80.7	79.1	78.4
Lunch-sunset-dinner-evening cruise	49.9	25.6	31.5	28.3	31.7	33.8	28.8
Lounge act-stage show	31.0	27.6	22.9	23.6	29.8	31.2	25.2
Nightclub-dancing-bar-karaoke	22.1	11.2	28.4	17.6	10.2	17.6	15.0
Fine dining	71.4	57.9	66.0	64.2	65.4	57.8	65.2
<b>All Shopping</b>	95.8	94.3	94.8	92.6	91.6	94.3	92.8
Department stores	30.3	47.8	52.0	50.3	49.5	44.9	50.2
Designer boutiques	53.0	42.4	40.7	40.2	37.1	41.4	40.0
Hotel stores	50.8	43.9	39.3	46.6	44.7	42.5	45.2
Swap meet	37.4	29.2	41.2	32.8	25.5	38.9	29.0
Discount/outlet stores	28.7	35.2	26.0	38.2	36.3	36.0	34.8
Supermarkets	75.7	73.2	66.3	66.6	65.7	64.5	69.0
Convenience stores	65.4	60.7	66.0	64.9	54.2	57.5	61.9
Duty free	5.0	6.6	7.7	10.2	3.6	9.5	6.2
<b>All Culture</b>	89.2	78.1	71.1	66.9	68.3	80.1	68.7
Historic site	67.9	51.8	52.6	51.3	49.9	59.0	49.8
Museum-art gallery	35.7	30.7	19.4	26.2	30.5	22.5	29.4
Polynesian show-luau	55.9	44.7	42.2	36.2	33.6	58.7	33.4
Art-craft fair	27.5	13.8	10.6	21.8	17.2	14.4	18.1
Festival	6.8	9.1	3.5	5.1	4.2	3.8	6.0
<b>All Transportation</b>	97.4	85.0	84.3	87.8	85.9	86.9	86.4
Trolley	3.5	5.1	4.9	6.8	8.0	9.2	5.7
Public Bus	2.3	6.9	11.3	11.2	13.2	13.0	9.9
Taxi-limousine	17.7	12.0	22.6	21.3	13.2	18.1	16.6
Rental Car	96.0	79.8	71.8	74.5	75.1	73.2	77.0
<b>Meeting</b>	3.1	5.0	7.4	17.1	11.0	6.0	12.2
<b>Convention</b>	0.0	2.7	3.1	8.5	5.7	5.8	5.3
<b>Incentive/reward</b>	3.2	3.3	3.2	4.1	3.2	2.9	3.7

**Table 5.9 Activity Participation by Lifestage – U.S. East [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	95.0	93.6	86.8	88.4	94.3	93.9	89.1
Helicopter or plane tour	20.6	19.7	9.5	10.0	23.1	20.7	12.6
Boat, submarine, whale watching	43.3	43.6	38.4	32.3	33.9	39.1	33.1
Tour bus excursion	22.5	15.3	16.7	20.3	32.8	32.6	15.1
Private limousine/van tour	9.5	8.4	6.0	6.8	11.5	11.2	6.4
Self-guided	90.1	78.2	74.1	82.6	76.5	78.8	79.6
<b>All Recreation</b>	96.1	98.0	93.6	93.0	86.3	91.8	91.8
Swimming-sunbathing-beach	95.2	96.0	89.3	84.6	72.8	84.2	83.1
Surfing / bodyboarding	21.3	37.2	23.1	18.7	8.9	17.6	20.3
Snorkeling-scuba diving	70.8	65.9	55.2	44.4	30.1	47.9	44.0
Jet skiing-parasailing-windsurfing	12.8	5.6	4.4	1.6	2.5	4.3	2.8
Golf	17.0	15.3	9.7	12.5	16.0	11.5	16.2
Running-jogging-fitness walking	28.5	41.2	30.1	38.5	33.6	30.2	40.5
Gym-health spa	28.2	26.9	17.8	16.2	10.3	14.5	18.9
Backpacking-hiking-camping	34.3	25.3	32.2	29.3	14.5	25.0	23.9
Sports event or tournament	1.2	4.3	5.3	5.0	5.5	5.2	4.6
<b>All Entertainment</b>	97.3	82.0	82.3	81.6	77.8	82.2	80.7
Lunch-sunset-dinner-evening cruise	51.6	31.8	38.1	30.8	32.2	38.2	29.3
Lounge act-stage show	32.1	42.0	29.6	31.0	35.3	38.7	29.8
Nightclub-dancing-bar-karaoke	21.5	18.0	32.5	18.3	10.0	20.1	15.1
Fine dining	80.5	67.5	66.5	66.6	62.9	66.0	66.6
<b>All Shopping</b>	97.6	97.7	98.8	93.4	91.9	96.7	92.5
Department stores	50.2	52.2	52.4	46.5	47.8	50.0	47.6
Designer boutiques	50.4	42.4	46.6	40.8	34.0	40.5	39.7
Hotel stores	67.1	58.6	45.9	55.3	51.0	54.3	53.5
Swap meet	29.4	37.4	44.0	35.2	31.1	35.2	34.7
Discount/outlet stores	29.2	39.0	32.5	36.7	42.7	38.2	38.0
Supermarkets	59.8	66.4	57.8	54.9	54.4	51.8	61.9
Convenience stores	63.9	65.1	66.6	63.9	54.6	61.4	61.3
Duty free	5.9	12.9	7.5	6.4	5.7	7.6	6.9
<b>All Culture</b>	86.8	82.4	78.3	84.1	83.1	87.3	79.0
Historic site	56.5	70.4	56.3	64.5	65.8	69.4	59.8
Museum-art gallery	28.9	32.7	22.2	29.6	29.9	26.2	31.8
Polynesian show-luau	74.7	61.4	50.4	55.7	52.7	68.3	45.0
Art-craft fair	9.2	21.1	16.4	15.8	18.6	14.2	20.0
Festival	5.0	4.1	5.1	4.1	6.8	5.2	5.2
<b>All Transportation</b>	92.1	91.6	80.8	91.8	85.6	86.8	89.7
Trolley	11.2	8.4	8.7	7.9	6.4	9.5	6.3
Public Bus	11.1	14.1	19.6	15.9	19.3	22.5	12.0
Taxi-limousine	17.2	16.3	23.2	26.6	18.7	22.7	20.3
Rental Car	85.5	79.8	62.1	78.7	70.9	68.5	80.0
<b>Meeting</b>	4.1	8.1	5.4	10.5	5.3	6.0	8.7
<b>Convention</b>	1.5	12.5	4.5	13.0	5.9	7.7	9.8
<b>Incentive/reward</b>	6.8	3.1	4.5	5.7	3.2	4.9	3.8



**Table 5.10 Activity Participation by Lifestage – Japan [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	93.0	92.3	91.1	89.3	94.5	95.3	89.5
Helicopter or plane tour	15.8	12.5	7.9	14.7	24.5	18.0	12.7
Boat, submarine, whale watching	23.5	20.5	13.0	15.3	20.8	23.7	14.8
Tour bus excursion	51.1	41.6	37.9	40.8	56.4	56.5	35.9
Private limousine/van tour	20.5	18.8	13.9	14.0	15.9	18.3	15.5
Self-guided	53.3	56.1	61.2	57.7	51.2	48.6	61.6
<b>All Recreation</b>	89.3	88.4	91.8	78.6	69.4	81.0	85.0
Swimming-sunbathing-beach	82.7	81.1	81.9	63.5	49.6	70.5	72.3
Surfing / bodyboarding	11.8	11.3	14.7	6.4	2.0	7.9	9.9
Snorkeling-scuba diving	25.8	21.0	33.3	15.7	6.9	21.3	18.2
Jet skiing-parasailing-windsurfing	10.5	3.8	9.8	2.7	1.5	6.8	3.3
Golf	2.0	6.1	2.3	11.8	16.8	3.7	12.0
Running-jogging-fitness walking	12.6	19.8	20.8	21.2	23.2	18.3	21.4
Gym-health spa	8.1	7.1	11.3	9.3	3.4	6.1	8.7
Backpacking-hiking-camping	6.6	7.8	8.5	8.3	6.8	8.7	6.8
Sports event or tournament	0.7	2.0	3.4	4.2	2.0	2.0	2.9
<b>All Entertainment</b>	93.1	88.3	91.8	85.6	86.8	91.1	86.5
Lunch-sunset-dinner-evening cruise	68.8	44.1	53.5	41.6	53.4	60.9	41.3
Lounge act-stage show	20.6	26.7	18.6	20.7	29.3	29.3	19.8
Nightclub-dancing-bar-karaoke	6.1	4.4	7.2	7.2	3.9	5.3	5.7
Fine dining	82.9	78.4	84.3	74.2	69.2	77.7	76.7
<b>All Shopping</b>	99.9	99.7	99.7	98.9	98.2	99.5	99.0
Department stores	65.2	56.1	74.1	50.8	34.1	52.2	56.3
Designer boutiques	74.5	66.2	70.1	60.7	54.1	63.6	64.8
Hotel stores	61.8	55.3	38.6	45.4	54.0	53.7	49.5
Swap meet	10.9	13.2	11.0	13.1	11.6	11.0	13.2
Discount/outlet stores	41.6	42.7	44.7	38.9	36.1	38.3	42.8
Supermarkets	50.3	62.9	69.1	61.4	50.5	51.8	65.5
Convenience stores	87.4	84.0	88.8	78.0	67.1	80.7	80.4
Duty free	91.4	85.9	84.1	79.8	72.6	83.0	82.0
<b>All Culture</b>	48.3	53.4	46.7	52.3	61.8	59.3	48.4
Historic site	21.2	25.2	21.8	27.4	32.1	31.1	22.0
Museum-art gallery	13.8	19.4	13.3	19.6	18.0	16.2	18.6
Polynesian show-luau	22.0	26.2	20.9	21.7	35.1	33.2	19.9
Art-craft fair	1.6	2.7	1.6	4.3	3.3	2.5	3.1
Festival	3.3	4.9	6.5	6.7	5.3	3.8	6.6
<b>All Transportation</b>	97.9	95.9	96.1	92.5	83.3	91.8	93.9
Trolley	88.7	69.5	70.7	56.8	50.0	70.9	61.4
Public Bus	12.3	22.1	31.4	31.5	25.8	19.2	29.4
Taxi-limousine	47.7	47.3	42.2	41.9	42.6	42.3	46.3
Rental Car	11.7	19.9	17.1	20.8	11.4	10.0	22.4
<b>Meeting</b>	0.4	1.0	2.9	4.8	2.6	2.2	2.3
<b>Convention</b>	0.2	0.2	1.5	2.5	1.6	0.8	1.4
<b>Incentive/reward</b>	0.3	2.3	2.7	5.5	4.4	3.2	3.2

**Table 5.11 Activity Participation by Lifestage – Canada [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	98.0	95.1	96.7	91.8	94.6	96.0	92.9
Helicopter or plane tour	23.6	8.1	9.7	18.3	21.0	20.4	12.9
Boat, submarine, whale watching	29.8	38.8	33.3	34.1	34.6	37.4	32.8
Tour bus excursion	17.0	12.5	21.6	28.3	39.8	37.9	20.0
Private limousine/van tour	7.9	6.3	7.2	11.3	11.6	9.0	10.3
Self-guided	85.3	87.6	89.2	81.1	76.5	80.3	83.6
<b>All Recreation</b>	98.6	96.8	99.0	96.0	84.8	91.8	93.9
Swimming-sunbathing-beach	97.1	96.8	97.7	86.6	77.3	86.2	88.4
Surfing / bodyboarding	35.0	58.6	48.3	26.5	11.1	29.2	32.1
Snorkeling-scuba diving	61.3	70.3	68.4	55.6	29.6	51.4	52.2
Jet skiing-parasailing-windsurfing	9.1	3.8	7.8	5.4	0.9	4.1	4.1
Golf	15.8	21.4	8.2	20.8	13.5	12.7	19.2
Running-jogging-fitness walking	34.6	48.3	43.8	43.9	40.9	39.7	46.3
Gym-health spa	20.7	11.0	13.6	11.2	5.6	11.1	9.1
Backpacking-hiking-camping	42.6	21.2	40.7	22.3	8.6	24.6	18.4
Sports event or tournament	8.1	8.1	12.6	8.9	4.3	7.3	8.1
<b>All Entertainment</b>	89.3	78.5	86.1	78.1	78.0	80.3	79.4
Lunch-sunset-dinner-evening cruise	37.1	25.4	46.2	35.4	39.2	40.2	33.8
Lounge act-stage show	53.2	37.3	36.9	34.2	35.1	40.6	32.6
Nightclub-dancing-bar-karaoke	9.1	8.0	33.2	17.7	8.8	14.6	15.6
Fine dining	66.1	60.0	64.4	58.9	55.1	58.2	59.5
<b>All Shopping</b>	98.5	98.5	99.4	96.9	96.1	95.7	98.7
Department stores	71.8	72.2	62.5	68.8	64.0	64.5	68.8
Designer boutiques	42.3	49.7	50.5	48.1	35.9	42.5	46.1
Hotel stores	53.6	44.8	47.1	46.0	40.7	50.6	39.7
Swap meet	44.5	42.7	54.0	42.2	38.0	41.3	44.0
Discount/outlet stores	44.3	54.1	42.6	44.9	46.7	41.9	50.5
Supermarkets	56.5	84.2	66.0	69.8	64.2	60.0	76.9
Convenience stores	67.6	73.4	82.8	66.2	65.3	67.9	71.4
Duty free	10.4	11.5	12.7	9.7	9.6	9.7	11.0
<b>All Culture</b>	82.7	83.4	82.4	81.0	81.5	86.3	78.5
Historic site	62.6	58.8	59.7	62.8	62.4	65.3	58.4
Museum-art gallery	25.8	34.7	27.1	28.9	32.2	30.8	30.6
Polynesian show-luau	69.4	57.5	59.3	47.6	46.7	60.5	44.6
Art-craft fair	8.4	22.4	11.3	20.7	19.9	18.0	19.6
Festival	9.7	6.6	4.4	3.5	7.7	5.2	6.2
<b>All Transportation</b>	97.0	96.5	90.0	91.9	87.1	90.4	91.4
Trolley	11.7	12.3	14.0	10.0	13.7	14.3	10.8
Public Bus	31.4	18.7	34.0	23.1	35.4	28.6	28.2
Taxi-limousine	39.1	27.8	30.7	27.4	26.9	29.4	27.3
Rental Car	81.1	82.8	64.0	73.7	57.5	64.9	71.7
<b>Meeting</b>	1.9	1.5	5.2	5.4	2.4	4.3	3.0
<b>Convention</b>	1.9	3.6	6.2	5.2	2.9	5.8	3.0
<b>Incentive/reward</b>	1.9	1.4	1.3	4.9	3.2	3.6	2.6

**Table 5.12 Activity Participation – Europe [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding / Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
<b>All Sightseeing</b>	92.3	95.0	93.3	92.7	94.9	94.2	92.0
Helicopter or plane tour	17.7	16.2	9.9	19.4	20.6	18.4	15.1
Boat, submarine, whale watching	39.1	29.4	31.6	32.0	27.4	31.0	31.8
Tour bus excursion	41.9	28.6	21.4	36.9	49.0	42.7	23.7
Private limousine/van tour	17.1	20.3	14.1	16.1	14.9	15.7	16.1
Self-guided	61.2	72.9	77.9	71.4	62.2	66.1	76.4
<b>All Recreation</b>	96.9	97.8	96.9	92.6	82.0	91.3	91.5
Swimming-sunbathing-beach	95.0	93.8	94.9	87.5	77.6	87.6	87.3
Surfing / bodyboarding	18.6	45.9	37.9	15.2	6.5	18.2	24.6
Snorkeling-scuba diving	47.5	56.7	54.4	38.1	21.9	38.6	40.9
Jet skiing-parasailing-windsurfing	5.1	3.7	3.3	2.8	1.0	2.4	3.5
Golf	3.5	6.7	6.2	5.9	5.3	4.6	7.8
Running-jogging-fitness walking	13.8	24.4	25.6	24.3	16.5	19.1	26.2
Gym-health spa	11.3	10.7	13.9	10.2	3.1	7.9	11.9
Backpacking-hiking-camping	15.6	13.1	29.9	17.9	6.9	16.0	17.3
Sports event or tournament	4.1	1.4	7.9	5.5	2.2	4.3	5.1
<b>All Entertainment</b>	92.2	79.0	81.5	76.3	75.7	80.6	75.5
Lunch-sunset-dinner-evening cruise	53.6	40.3	46.1	36.8	37.8	43.7	34.6
Lounge act-stage show	32.7	28.2	16.2	24.4	30.4	27.3	22.2
Nightclub-dancing-bar-karaoke	30.4	10.6	41.7	18.7	11.3	21.3	22.5
Fine dining	74.1	54.0	48.4	55.7	52.8	54.9	57.1
<b>All Shopping</b>	97.0	98.0	96.8	96.0	94.8	95.7	97.1
Department stores	71.9	68.7	68.4	72.0	70.3	69.2	74.0
Designer boutiques	40.7	53.9	39.1	44.5	31.4	41.1	37.8
Hotel stores	68.6	55.6	36.7	49.2	47.9	50.8	45.5
Swap meet	22.0	29.4	27.4	26.9	25.1	25.5	27.7
Discount/outlet stores	29.7	42.5	30.6	36.5	34.7	34.1	35.9
Supermarkets	69.5	77.7	74.9	70.7	65.4	67.7	77.4
Convenience stores	58.2	53.8	48.0	51.9	48.7	50.9	52.0
Duty free	20.2	21.9	18.7	17.5	13.7	18.3	14.8
<b>All Culture</b>	79.9	83.2	74.4	78.0	79.1	79.3	75.7
Historic site	61.5	64.4	56.7	60.8	58.8	60.6	58.1
Museum-art gallery	24.1	33.2	28.7	25.1	31.6	28.1	28.2
Polynesian show-luau	46.3	43.3	36.3	39.5	49.8	45.7	35.9
Art-craft fair	7.4	13.3	9.5	11.8	13.7	9.8	15.8
Festival	5.8	1.8	6.8	5.4	8.6	5.4	8.5
<b>All Transportation</b>	89.9	91.8	92.3	92.5	87.2	90.3	91.4
Trolley	22.2	18.3	13.4	19.0	22.5	20.6	15.9
Public Bus	31.8	33.4	41.0	37.2	42.2	39.5	35.6
Taxi-limousine	48.2	40.7	45.4	37.9	33.9	42.1	33.4
Rental Car	49.0	59.9	61.8	54.6	41.4	48.5	60.9
<b>Meeting</b>	1.0	0.7	6.2	6.5	3.3	4.1	5.2
<b>Convention</b>	1.8	3.7	4.3	5.7	2.5	3.2	5.6
<b>Incentive/reward</b>	0.5	0.5	2.2	3.0	1.0	1.4	2.9

## 6. TRIP PLANNING

# TRIP PLANNING

## Trip Planning and Booking Timetable

Information on how visitors plan their trips and when they make reservations can greatly enhance preparation of effective marketing and promotion plans. Trip planning behavior is distinctive among the major market areas. Japanese visitors tend to keep a short planning window while those westbound visitors who travel longer distances, U.S. East, Europeans and some Canadians, tend to plan much farther in advance.

### U.S. West

- The majority (approximately two-thirds) of U.S. West visitors will have decided to take a vacation and decided to visit Hawaii four months or more before their actual arrival dates.
- Group visitors started planning a little farther out (10 months or more)
- U.S. West visitors tend to decide on the islands they want to visit approximately the same time as they are deciding to visit Hawaii.
- The bulk of visitors will set dates, book airlines and accommodations, and make purchases around one to three months out. By that time about eight out of ten visitors have completed their transactions. Most of the rental car reservations (68.3%) also would have been done within one month of arriving
- The purchasing of tour and attraction packages (64.7%) is typically done less than one month out or even while on the vacation.

### U.S. East

- More U.S. East visitors will start earlier than their U.S. West counterparts. About half (51%) will have decided to take a vacation and decided to visit Hawaii about seven or more months before arrival.
- Almost four out of ten visitors will start the decision making process ten or more months before arrivals (Only about one-third of U.S. West visitors started this early).
- More U.S. East visitors tend to decide on the island they want to visit a little bit later than when they are deciding to visit Hawaii. It takes until four months before the trip for a majority (68.6%) of visitors to select the islands to visit.
- Just over half of visitors will set dates, book airlines and accommodations, and make purchases around four months out.
- Similar to U.S. West visitors, U.S. East visitors will make car reservations within one month of arriving and purchase tours and attractions closer to vacation time.

### Japan

- Japanese visitors are much later to act than other MMAs. They also maintain a very narrow booking window. Most of the decision making occurs within just one to three months before the actual vacation date.

- Half of the visitors will decide that they want to go to Hawaii (49.5%) and the islands (53.1%) they want to visit during that one to three month window.
- Six out of ten visitors will also set a date for the trip (58.7%), make a flight reservation (61.1%), purchase the tickets (59.4%), and book a hotel (60.7%) all within one to three months of arriving.
- Approximately one-quarter of airline reservations (24.1%) and ticket purchases (28.6%) were done less than one month before arrival.

## **Canada**

- Canadian visitors start planning very similar to the U.S. West visitors. Approximately two-thirds of visitors will have decided to take a vacation and decided to visit Hawaii four months or more before their actual arrival dates.
- They tend to decide on the islands they want to visit approximately the same time as they are deciding to visit Hawaii.
- Canadians book and purchase slightly earlier than U.S. West. About half will set dates (56.3%), make airline reservations (48.1%), book accommodations (49.2%), and make airline ticket purchases (46.8%) four months out. Most of the rental car reservations (59.8%) also would have been done within one month of arriving
- The purchasing of tour and attraction packages (77.4%) is typically done less than one month out or even while on the vacation.

## **Europe**

- European visitors will start early like their U.S. East counterparts. About half (50.9%) will have decided to take a vacation and decided to visit Hawaii (48.2%) about seven or more months before arrival.
- European visitors leave the decision on the islands they want to visit a little bit later than when they are deciding to visit Hawaii. It takes until four months before the trip for a majority (65.2%) of visitors to select the islands to visit.
- More than half of visitors will set dates, book airlines and accommodations, and make purchases around four months out.
- Almost half (46.6%) of visitors will make car reservations and purchase tours and attraction packages (71.8%) near to vacation time or during the vacation.

## **Island Visitation Decision Timetable**

Before arriving in Hawaii, most visitors to Hawaii in 2005 have already made a decision of exactly which islands they intend to visit. The larger destinations of Oahu, Maui, Kauai and Kona were definitely predetermined.

- More than nine out of every ten visitors have decided before they arrive in Hawaii to visit those destinations.
- To a lesser extent Hilo was also a prearranged trip, with about eight out of ten visitors deciding before hand to visit.
- The only exception was the Japanese visitor to Kauai. Just as in past years, a significant amount (13.4%) of Japanese visitors decided to visit Kauai only after they had landed in Hawaii.
- The other destinations of Molokai and Lanai were visited by many who only decided to visit after their arrival in Hawaii.
- More than a third of Molokai visitors and almost a half of Lanai visitors added an unplanned trip to these unique destinations.

## **Sources of Information Used to Plan Trip**

The value of the Internet as a trip-planning tool is high among U.S., Canadian and European visitors. However, only half of Japanese visitors (49.9%) used the Internet to seek out information in 2005. Assistance from travel agents for trip-planning is lower in the U.S. market but continues to be a strong factor in the Japanese and European markets. Printed materials and books continue to be popular in the U.S. while Japanese visitors utilize magazines and books.

- Two-thirds of U.S. Visitors are using the Internet to help plan their trip.
- The percentage of U.S. visitors that use the Internet (66.4%) is more than double the number who rely on travel agents (27.7%) for trip-planning information.
- Since many U.S. West visitors have been to Hawaii before, they rely on personal experiences to help them plan their trips (51.7%).
- Japanese visitors continue to put heavy reliance on travel magazines (44%) and travel books (43.1%) for information.
- Few Japanese use airlines as a source of information (10.1%), while a third of U.S. West visitors do gather information from airlines (33.1%).

## **Internet Use**

Among those visitors who did use the Internet, the way in which the Internet was used for planning and booking of trips differed between the U.S. and Japan markets.

- U.S. Internet users (69%) and to a lesser extent Canadian users (53.8%) relied on the Internet for online airline reservations. About half also used the Internet for their hotel reservations.

- Half of the Internet users from the U.S. West (50.5%) and U.S. East (47.7%) also used the Internet to make their rental car reservations.
- Among Japanese Internet users, the Internet was mainly used to find a hotel or place to stay (69.3%). Recently locating shopping places has become a popular use (43.7%). Few Japanese use the Internet for airline, hotel or car reservations.

## **Use of Travel Agent**

Visitors are using travel agents mostly for assistance in making airline reservations. Agents are also utilized to make hotel and car arrangements. As mentioned earlier, Japanese travelers have the heaviest reliance on travel agents.

- Interestingly, unlike the other market areas, among visitors who used a travel agent, many Japanese (31.5%) are likely to use agents to help them plan activities.
- About a third of Japanese visitors used an agent to purchase packages (35.8%) in 2005.
- The Japanese market does not use an agent to make rental car reservations (6.1%).
- Canadians (24.2%) and Europeans (25.4%) also have less reliance on agents for rental car reservations compared to U.S. West (56.1%) and U.S. East (45.4%).
- For U.S. visitors who used travel agents, 61 percent used travel agents to make hotel arrangements and 52 percent to make rental car reservations.
- Airline reservations were made for 74.8 percent of U.S. travel agent users, 76 percent of Japanese, 80 percent of Canadians and 86.5 percent of Europeans.



**Table 6.1 Trip Planning & Booking Timetable – U.S. Total [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	7.9	22.1	26.1	12.2	15.5	16.2
Decide to visit Hawaii	9.8	22.2	23.3	11.7	15.6	17.3
Decide on which islands to visit	12.5	23.6	23.8	12.4	14.6	13.1
Set date for the trip	12.6	28.3	25.5	12.2	12.8	8.6
Airline reservations	16.2	37.2	26.6	12.1	6.3	1.7
Purchase tickets	16.8	38.2	26.5	11.3	5.8	1.3
Accommodation reservations	16.1	33.2	25.2	12.8	8.2	4.6
Rental car reservations	32.6	35.3	20.3	8.0	3.3	0.6
Purchase tour or attraction packages	65.2	18.5	10.2	2.8	2.1	1.3

**Table 6.2 Trip Planning & Booking Timetable – U.S. West [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	9.2	25.6	26.0	11.6	13.9	13.7
Decide to visit Hawaii	10.7	25.6	23.5	11.2	13.8	15.2
Decide on which islands to visit	13.8	25.4	23.7	11.9	12.6	12.6
Set date for the trip	14.5	31.0	25.3	11.4	10.8	7.0
Airline reservations	18.1	39.9	26.8	10.0	4.3	1.0
Purchase tickets	18.5	41.4	26.0	9.1	3.9	1.0
Accommodation reservations	17.6	36.3	24.5	10.6	6.8	4.3
Rental car reservations	31.7	36.8	20.9	7.9	2.2	0.5
Purchase tour or attraction packages	64.7	20.4	10.0	2.1	1.7	1.2

**Table 6.3 Trip Planning & Booking Timetable – U.S. East [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	5.9	16.8	26.2	13.1	17.9	20.1
Decide to visit Hawaii	8.5	17.1	23.1	12.4	18.3	20.6
Decide on which islands to visit	10.6	20.9	24.0	13.1	17.5	13.9
Set date for the trip	9.7	24.2	25.8	13.5	15.8	11.0
Airline reservations	13.2	32.9	26.2	15.5	9.4	2.7
Purchase tickets	14.1	33.2	27.3	14.8	8.8	1.8
Accommodation reservations	13.7	28.4	26.4	16.1	10.3	5.1
Rental car reservations	34.1	32.9	19.2	8.1	5.0	0.7
Purchase tour or attraction packages	65.8	16.2	10.4	3.6	2.5	1.4

**Table 6.4 Trip Planning & Booking Timetable – Japan [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	10.3	45.1	25.6	6.1	4.8	8.1
Decide to visit Hawaii	12.1	49.5	22.1	4.9	4.7	6.6
Decide on which islands to visit	15.3	53.1	19.5	4.4	3.7	4.0
Set date for the trip	18.8	58.7	16.0	3.1	2.0	1.4
Airline reservations	24.1	61.1	11.8	1.8	0.7	0.4
Purchase tickets	28.6	59.4	9.7	1.4	0.4	0.5
Accommodation reservations	24.0	60.7	12.3	1.8	0.7	0.6
Rental car reservations	61.9	29.9	7.1	0.4	0.1	0.5
Purchase tour or attraction packages	66.7	29.6	3.2	0.2	0.2	0.2

**Table 6.5 Trip Planning & Booking Timetable – Canada [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	9.4	23.0	23.7	12.6	15.8	15.5
Decide to visit Hawaii	10.6	24.8	22.3	12.9	14.6	14.8
Decide on which islands to visit	13.5	26.3	22.7	12.2	14.1	11.2
Set date for the trip	12.6	31.0	23.5	13.3	13.3	6.2
Airline reservations	14.8	37.2	25.8	14.0	7.0	1.2
Purchase tickets	15.8	37.4	25.1	13.5	6.9	1.2
Accommodation reservations	16.6	34.2	24.1	12.2	9.0	4.0
Rental car reservations	40.2	34.7	15.4	6.8	2.4	0.5
Purchase tour or attraction packages	77.4	13.1	5.9	2.1	0.7	0.7

**Table 6.6 Trip Planning & Booking Timetable –Europe [Percentage of Visitors]**

	Time Before Departure					
	less than 1 month	1 to 3 months	4 to 6 months	7 to 9 months	10 to 12 months	More than 1 year
Decide to take vacation/ pleasure trip	7.2	17.3	24.6	17.4	17.0	16.5
Decide to visit Hawaii	7.7	19.3	24.8	17.5	14.9	15.8
Decide on which islands to visit	11.7	23.1	23.9	16.9	13.9	10.5
Set date for the trip	11.0	23.0	26.2	17.2	13.6	9.1
Airline reservations	12.3	27.5	28.4	16.4	10.5	4.8
Purchase tickets	15.7	28.0	26.8	15.0	9.9	4.6
Accommodation reservations	17.5	28.2	23.7	15.3	10.0	5.2
Rental car reservations	46.6	27.0	15.5	6.2	3.3	1.4
Purchase tour or attraction packages	71.8	12.8	7.0	3.1	2.0	3.2

**Table 6.7 Island Visitation Decision Timetable [Percentage of Visitors by MMA]**

		U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Decide on Oahu	Decide before arrival in Hawaii	96.5	96.2	96.9	98.4	95.8	94.9
	Decide after arrival in Hawaii	3.5	3.8	3.1	1.6	4.2	5.1
Decide on Maui	Decide before arrival in Hawaii	94.7	93.4	96.4	95.3	94.0	89.5
	Decide after arrival in Hawaii	5.3	6.6	3.6	4.7	6.0	10.5
Decide on Molokai	Decide before arrival in Hawaii	61.0	58.4	65.6	56.0	62.3	66.9
	Decide after arrival in Hawaii	39.0	41.6	34.4	44.0	37.7	33.1
Decide on Lanai	Decide before arrival in Hawaii	54.5	53.8	55.0	100.0	61.4	62.3
	Decide after arrival in Hawaii	45.5	46.2	45.0		38.6	37.7
Decide on Hilo	Decide before arrival in Hawaii	83.1	85.0	81.9	88.1	88.5	78.8
	Decide after arrival in Hawaii	16.9	15.0	18.1	11.9	11.5	21.2
Decide on Kona	Decide before arrival in Hawaii	92.0	91.3	92.8	96.8	92.5	88.0
	Decide after arrival in Hawaii	8.0	8.7	7.2	3.2	7.5	12.0
Decide on Kauai	Decide before arrival in Hawaii	95.2	94.5	95.9	86.6	94.1	90.3
	Decide after arrival in Hawaii	4.8	5.5	4.1	13.4	5.9	9.7

**Table 6.8 Sources of Information Used for Trip Planning [Percentage of Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Travel agents	27.7	25.8	30.6	67.5	40.0	54.4
Internet	66.4	65.8	67.1	49.9	68.8	63.9
Personal experience	46.9	51.7	39.5	41.9	43.2	22.7
Wholesalers	9.5	8.9	10.3	17.3	9.6	16.9
Friends/ relatives	39.9	37.9	43.0	30.0	38.7	29.3
Magazines	10.1	8.7	12.1	44.0	10.1	11.4
Books	22.8	19.4	28.1	43.1	20.5	36.6
Hotels/resorts	24.3	22.2	27.6	8.9	18.1	15.3
Airlines	31.8	33.1	29.9	10.1	24.6	16.1
Hawaii Visitors & Convention Bureau	9.4	7.9	11.6	8.1	11.0	8.9
Newspapers	2.9	2.8	3.1	2.9	3.7	3.8

**Table 6.9 Internet Usage for Trip Planning  
[Percentage of Visitors Who Used Internet by MMA]**

	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Find things to do	50.4	45.5	58.1	40.7	56.9	59.5
Estimate costs	48.2	47.6	49.1	17.8	51.2	44.0
Find hotel or place to stay	47.7	44.7	52.3	69.3	52.6	53.9
Find good restaurant	20.1	19.2	21.5	34.7	16.5	17.0
Find recreational activities	37.4	33.5	43.5	34.6	40.5	25.5
Maps and directions	41.8	41.5	42.4	28.1	46.7	41.3
Locate sightseeing places	28.2	23.0	36.4	39.2	35.0	38.9
Make airline reservations	69.0	70.9	66.0	19.8	53.8	37.9
Make hotel reservations	45.7	43.8	48.7	23.5	46.0	37.9
Rental car reservations	49.4	50.5	47.7	11.6	41.1	25.2
Locate shopping places	8.5	8.3	8.8	43.7	12.1	13.2
Find evening activities	13.9	12.3	16.4	5.9	13.4	11.3

**Table 6.10 Usage of Travel Agent by MMA  
[Percentage of Visitors Who Used Travel Agents by MMA]**

	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Help in deciding travel to Hawaii	8.6	6.2	12.0	10.6	12.7	12.2
Help in choosing the airline	44.5	44.3	44.7	41.8	54.1	48.3
Help in planning activities	16.4	11.2	23.4	31.5	14.5	10.4
Make airline reservations	74.8	74.9	74.6	76.2	80.0	86.5
Make hotel arrangements	60.9	58.1	64.7	77.4	51.7	68.3
Make rental car reservations	51.6	56.1	45.4	6.1	24.2	25.4
Help in purchasing your packages	21.9	17.8	27.3	35.8	12.7	9.6

## 7. SAFETY ISSUES AND OTHER NUISANCES

## SAFETY ISSUES AND OTHER NUISANCES

The safety of Hawaii’s visitors is very important to the State of Hawaii and industry partners. Therefore, the 2005 Visitor Satisfaction Survey questionnaire also asked visitors if they had experienced any adversity or safety issues while in Hawaii. Overall, less than one out of every eleven visitors experienced any issues of concern.

- Japanese visitors were the least likely to experience a problem on their trip (6.9% of visitors). Mostly their problem was solicitation by prostitutes (1.2%).
- U.S. West visitors were most prone to a predicament (8.7%), particularly with drug dealers (3.6%) and having their cars vandalized (1.5%).
- Drug dealing was also an issue for U.S. East visitors (2.5%) and Canadians (3.5%).
- Europeans had to deal with solicitation by prostitutes (2.4%).

**Table 7.1 Issues and Other Nuisance [Percentage of Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
no problems	92.2	91.3	93.4	96.1	92.1	93.3
drug dealers	3.2	3.6	2.5	1.1	3.5	2.0
solicited by prostitutes	1.7	2.0	1.2	1.2	2.4	2.4
wallet stolen	1.7	1.9	1.3	1.1	0.9	1.2
room vandalized	0.3	0.3	0.4	0.1	0.6	0.6
car vandalized	1.2	1.5	0.8	0.3	1.1	0.9
violence	0.4	0.5	0.3	0.2	0.4	0.4
parking ticket	1.2	1.2	1.2	0.5	1.0	0.7

**Table 7.2 Issues and Other Nuisance – U.S. Total [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	87.7	93.6	87.6	90.2	95.7	93.5	91.5
drug dealers	9.1	1.2	6.8	4.5	0.8	2.3	3.6
solicited by prostitutes	1.1	1.5	2.2	2.7	0.8	1.9	1.6
wallet stolen	0.0	2.8	2.5	1.3	1.4	1.5	1.7
room vandalized	0.0	0.0	0.2	0.5	0.3	0.2	0.4
car vandalized	0.0	0.5	2.8	1.3	1.2	0.9	1.4
violence	0.5	0.7	0.8	0.3	0.2	0.1	0.5
parking ticket	2.0	1.2	0.8	1.0	1.3	1.0	1.3

**Table 7.3 Issues and Other Nuisance – U.S. West [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	88.3	92.8	87.1	87.6	96.3	93.2	90.8
drug dealers	7.6	1.2	6.8	6.1	0.8	1.8	4.1
solicited by prostitutes	0.0	1.4	1.8	3.9	0.9	2.4	1.9
wallet stolen	0.0	3.4	2.9	1.5	1.4	2.0	1.9
room vandalized	0.0	0.0	0.0	0.6	0.3	0.0	0.3
car vandalized	0.0	0.8	3.4	1.5	1.5	1.5	1.5
violence	1.0	0.9	1.3	0.2	0.2	0.0	0.6
parking ticket	3.1	1.2	0.4	1.2	1.3	0.6	1.4

**Table 7.4 Issues and Other Nuisance – U.S. East [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	87.1	95.3	88.5	94.1	94.8	93.7	93.2
drug dealers	10.7	1.2	6.6	2.0	0.9	2.6	2.5
solicited by prostitutes	2.3	1.6	3.0	0.9	0.6	1.5	1.0
wallet stolen	0.0	1.4	1.9	1.1	1.4	1.2	1.3
room vandalized	0.0	0.0	0.6	0.5	0.4	0.3	0.4
car vandalized	0.0	0.0	1.8	0.9	0.8	0.5	1.1
violence	0.0	0.0	0.0	0.6	0.2	0.2	0.3
parking ticket	1.0	1.3	1.3	0.7	1.3	1.3	1.1

**Table 7.5 Issues and Other Nuisance – Japanese [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	95.5	96.8	95.3	95.0	97.0	96.9	95.4
drug dealers	2.0	0.5	2.6	1.0	0.1	1.0	1.2
solicited by prostitutes	1.0	1.1	1.2	1.8	1.0	0.7	1.7
wallet stolen	0.6	1.1	1.2	1.3	1.4	0.9	1.3
room vandalized	0.2	0.0	0.0	0.3	0.0	0.1	0.1
car vandalized	0.4	0.2	0.2	0.5	0.1	0.1	0.4
violence	0.5	0.2	0.3	0.1	0.0	0.2	0.2
parking ticket	0.3	0.5	0.1	0.8	0.4	0.3	0.6

**Table 7.6 Issues and Other Nuisance – Canada [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	84.8	92.7	84.8	91.9	96.5	91.6	92.4
drug dealers	9.2	2.4	7.8	4.0	0.3	4.0	3.1
solicited by prostitutes	5.8	1.0	5.9	1.2	1.3	2.8	2.0
wallet stolen	3.1	1.1	0.5	1.0	0.8	0.7	1.0
room vandalized	5.0	1.4	0.5	0.2	0.2	0.9	0.4
car vandalized	0.0	1.4	0.8	1.5	0.8	0.9	1.2
violence	3.1	0.6	0.4	0.2	0.2	0.3	0.4
parking ticket	4.3	0.5	1.9	1.0	0.5	1.1	0.9

**Table 7.7 Issues and Other Nuisance – Europe [Percentage of Visitors by Lifestyle/Lifestage Segments and Visitation Status]**

	Lifestyle/Lifestage Segments					Visitation Status	
	Wedding/ Honeymoon	Family	Young	Middle Age	Seniors	First timers	Repeat visitors
no problems	94.4	93.1	87.7	93.7	95.9	93.6	92.6
drug dealers	1.9	0.0	5.3	1.6	1.1	1.4	3.5
solicited by prostitutes	1.6	0.5	5.2	2.5	1.2	2.5	2.0
wallet stolen	0.5	1.4	2.1	0.3	2.0	1.0	1.7
room vandalized	0.4	1.4	0.5	0.4	0.7	0.5	0.8
car vandalized	0.7	2.7	0.4	1.3	0.4	0.7	1.4
violence	0.4	0.6	0.4	0.3	0.5	0.3	0.7
parking ticket	0.4	2.0	0.9	0.6	0.5	0.6	0.9



## 8. VISITOR PROFILE

# VISITOR PROFILE

## Lifestyle/Lifestage Segments and Visitation Status

### U.S. Visitors

- Based on survey responses approximately 3.4 percent of U.S. West parties were honeymoon or wedding visitors while among U.S. East visitor they made up 5.7 percent of visitors.
- Middle age and seniors made up the majority of U.S. visitor parties.
- Family travel parties make up 22 percent of U.S. West and 15.4 percent of U.S. East visitors.
- U.S. East visitor parties are almost evenly distributed between first-time visitors (47.3%) and repeat visitors (52.7%). U.S. West visitor parties are mainly repeat visitors (78.9%).

### Japanese Visitors

- About a third (32%) of Japanese visitor parties are family travelers and another 12.7 percent are honeymoon or wedding travelers.
- Approximately equal amounts of parties of middle age visitors (20.3%) and seniors (20%) came from Japan.
- Just over half (55.7%) of the Japanese visitor parties were repeat visitors.

### Canadian Visitors

- Many Canadian visitor parties are composed of senior travelers (33.1%).
- Slightly more parties of repeat visitors (56.1%) came last year than first-timers (43.9%).

### European Visitors

- Parties of Middle Age visitors made up one third of the visitors from Europe. About 12 percent of Wedding/Honeymoon visitors also came in 2005.
- Europeans are mostly first time visitors (71.6%).

## Employment, Income and Education

### U.S. West

- The majority (70.5%) of the respondents work, 16.4 percent have retired while 10.1 percent were homemakers and/or students.
- Survey results for 2005 showed that approximately 18 percent of U.S. West respondents reported annual household income of less than \$50,000.
- U.S. West visitors with household income from \$70,000 to \$125,000 comprised the largest groups of respondents at about 34.9 percent.
- In addition, 24.4 percent of U.S. West visitors reported annual household income of \$150,000 or more.

- About 61.3 percent of the respondents have some college or college degrees, 28.4 percent have post graduate degrees, and 6.2 percent were high school graduates.

### **U.S. East**

- The percentages of working visitors, retirees, homemakers and students were not much different than the respondents from the U.S. West. The majority (72.2%) of the respondents work, 16.9 percent have retired while 8.5 percent were homemakers and/or students.
- Survey results for 2005 showed that approximately 21 percent of U.S. East respondents reported annual household income of less than \$50,000.
- U.S. East visitors with household income from \$70,000 to \$125,000 comprised the largest groups of respondents at 37.2 percent.
- In addition, 20.6 percent of U.S. East visitors reported annual household income of \$150,000 or more.
- About 60.3 percent have some college or college degrees, 28.2 percent have post graduate degrees, and 7.1 percent were high school graduates.

### **Japanese Visitors**

- Close to 63 percent of the respondents work for a living, however there were more homemakers (18.4%) and fewer retirees (8.6%) compared to their U.S. counterparts.
- About 40 percent of the visitors from Japan reported annual household income of less than 5 million yen (approximately \$45,300 U.S.).
- Respondents with income between 5 million yen (approximately \$45,300 U.S.) and 9.99 million yen (approximately \$90,600 U.S.) accounted for 37.6 percent of Japanese visitors surveyed.
- About 8.1 percent of the respondents who visited Hawaii reported annual household income of 15 million yen (approximately \$136,000 U.S.) or more.
- About 52.8 percent have some college or college degrees, 4.2 percent have post graduate degrees and a larger percentage (30.6%) were high school graduates in contrast to their counterparts from other destinations.

### **Canadian Visitors**

- About 68 percent of the respondents work and about 6.5 percent were homemaker and students. More retirees (22.2%) from Canada responded to the survey compared to visitors from the other markets.
- About 25.4 percent of the Canadian visitors surveyed reported annual household income of less than \$50,000.
- Canadians with income between \$50,000 to \$99,999 comprised the largest group (39.6%) while 16.2 percent of the respondents reported annual household income of \$150,000 or more.
- Nearly 53.4 percent of the respondents have some college or college degrees, 21.6 percent have post graduate degrees and 12.3 percent were high school graduates.

## **European Visitors**

- Close to 90 percent have vacationed more than 1,000 miles from home in the past three years. The largest group of respondents work for a living (73%) and 17.4 percent were retired.
- About 33.8 percent of the European visitors surveyed reported annual household income of \$50,000 or less.
- Those with income between \$50,000 to \$99,999 accounted for almost 37 percent while 11 percent of the European respondents reported annual household income of \$150,000 or more.
- About 42.2 percent of the respondents have some college or college degrees, 21 percent have post graduate degrees while 15.2 percent were high school graduates.

## **Other Visitor Characteristics**

### **U.S. West Visitors**

- Over half of the U.S. West visitors who responded to the 2005 survey were female and 43.9 percent were male. The median age was 49 years old. About 87 percent have traveled on vacation more than 1,000 miles from home in the past three years and half (49.9%) have visited Las Vegas in the last five years.
- Close to 48 percent of the respondents have friends or relatives in Hawaii, 11.3 percent have lived in Hawaii before. Close to 7 percent own timeshare property in Hawaii while 4.7 percent own other types of property in the islands.
- Even though 70 percent of the U.S. West visitors stayed in a hotel on Oahu, almost one-fifth of Oahu visitors stayed at a friend's or family's home (19.1%). On Maui more U.S. West visitors stayed in condos (41.1%) than in hotels (35.3%). Many visitors stayed in a time share while on Kauai (22.4%) of the Big Island (14.2%). Some visitors (8.3%) even rented a home while visiting Kauai.

### **U.S. East Visitors**

- Similar to U.S. West visitors, over half of the U.S. East visitors who responded to the 2005 survey were females and 45.3 percent were male. The median age was also the same, 49 years.
- The majority (83.6%) of the visitors have taken a long distance trip of more than 1,000 miles from their homes in the past three years. Half (50.5%) have been to Florida in the past five years.
- About 6.4 percent of the respondents have previously lived in Hawaii, 34.8 percent have friends or relatives here, while 5.7 percent own time-share property in the islands.
- On Oahu most U.S. East visitors stayed in hotels (75.4%). Many of the U.S. East visitors stayed overnight on a cruise ship while visiting Maui (18.5% of U.S. East Maui visitors), Kauai (29.7%) and the Big Island (26%).

## **Japanese Visitors**

- There were also more female than male Japanese visitors surveyed at 52.9 percent to 47.1 percent, respectively, but in contrast to U.S. visitors surveyed the median age was slightly younger at 43 years old.
- Close to 66 percent of the respondents have taken a long distance trip of more than 1,000 miles from their homes in the past three years. Almost 19 percent have visited Guam/Saipan and 18.1 percent have visited Korea in the past five years.
- Few Japanese respondents have lived in Hawaii before, own time share property in Hawaii or have friends or relatives in the islands compared to U.S. visitors.
- Japanese visitors mainly stay in hotels while on Oahu (90.8%), Maui (79.5%), Big Island (89.6%), and Kauai (74.8%). On Kauai some prefer to stay in condos (23.5%).

## **Canadian Visitors**

- There were also more female respondents (51.9%) than male respondents (48.1%) among Canadian visitors surveyed. Like the U.S. counterparts, the median age was 49 years old.
- The majority (87.7%) of the respondents have taken a long distance trip of more than 1,000 miles from their homes in the past three years. Many Canadians have traveled to California (34.0%), Florida (30.4%), or around Canada (43.8%) in the past five years.
- Only 2.5 percent have lived in Hawaii before, 4.3 percent own timeshare property in the islands, and 19.8 percent have friends or relatives in Hawaii.
- Canadian visitors prefer hotels on Oahu (68.5%) but use condos while on Maui (45.3%). Like the U.S. East visitor, many visit the neighbor islands by day but retire to the cruise ship at night. Almost half of Kauai visitors stayed on the cruise ship (45.9%), on the Big Island about two-thirds (37.5%) and approximately a quarter (22.7%) on Maui.

## **European Visitors**

- In contrast to U.S., Japanese or Canadian visitors, there were more male (57.8%) respondents from Europe compared to female (42.2%). The median age was 45.4 years old.
- About 16.2 percent of the respondents have friends or relatives in Hawaii and 2.3 percent have lived in Hawaii before. Almost half (46.8%) of the visitors who came to Hawaii in 2005 visited California in the past five years.
- Only 0.6 percent own timeshare property in the islands while 0.5 percent own other types of property in Hawaii.
- Europeans mainly use hotels while visiting the islands – 84.4 percent on Oahu, 53.3 percent on Maui, 60.8 percent on the Big Island and 49.6 percent on Kauai.

## **Primary Purpose of Trips**

### **U.S. Visitors**

- Approximately 65 percent of the U.S. West and almost 64 percent of U.S. East visitors surveyed in 2005 listed vacation as the primary reason for coming to the islands.

- Other primary reasons for U.S. respondents to visit Hawaii were to: visit friends/relatives (9.3% U.S. West and 7.1% U.S. East); attend business meetings/conduct business (7.9% U.S. West and 7.6% U.S. East); attend a convention/conference/seminar (3.8% U.S. West and 7.1% U.S. East); or honeymoon (2.2% U.S. West and 4.3% U.S. East).

### **Japanese Visitors**

- Vacation was the primary reason for nearly 66 percent of Japanese respondents to visit Hawaii.
- In addition, 6 percent of Japanese respondents listed attending/participating in weddings, 9.1 percent to honeymoon, 3.4 percent for shopping/fashion, and 2.6 percent listed getting married as other primary reasons for visiting Hawaii.

### **Canadian Visitors**

- About 79 percent of Canadian respondents indicated that vacation was their primary reason for coming to the islands.
- Other significant reasons included: 4.2 percent came to visit friends/relatives; about 3.1 percent attended a convention/conference/seminar.

### **European Visitors**

- Vacation was also the primary reason for 71.4 percent of the European respondents to visit Hawaii.
- In addition, 8.6 percent came to honeymoon, 4.4 percent visited friends/relatives, and 4.5 percent attended a convention/conference/seminar.

## **Secondary Purpose of Trips**

### **U.S. Visitors**

- About 43.1 percent of U.S. West and 48.9 percent of U.S. East surveyed in 2005 listed vacation as their secondary purpose of trip. Other secondary reasons to come to Hawaii were to visit friends/relatives (23.4% U.S. West and 18.1% U.S. East), to attend business meetings/conduct business (7.2% U.S. West and 6.2% U.S. East).

### **Japanese Visitors**

- Shopping/fashion was the prevailing secondary purpose of trip among 52.6 percent of the Japanese respondents.
- Vacation (19.6%) was the next secondary purpose of the trip among the respondents. In addition, 4.4 percent visited friends/relatives.

### **Canadian Visitors**

- About 44.3 percent of the Canadian respondents indicated that vacation was their secondary purpose for coming to Hawaii while 21.2 percent visited friends/relatives.
- About 3.7 percent attended a business meeting/conduct business and/or attended conventions/conferences/seminars.

### **European Visitors**

- Similarly, vacation was the secondary purpose of trip for 46.6 percent of the European visitors surveyed. In addition, 7.3 percent listed shopping and fashion.

### **Travel Companions**

#### **U.S. Visitors**

- The majority of the U.S. West and U.S. East respondents in 2005 traveled to the islands with their spouses (45.9% U.S. West and 55.4% U.S. East), with children (22.2% U.S. West and 15.1% U.S. East) and with other family members (22.0% U.S. West and 24.1% U.S. East).
- Additionally, 20.8 percent of U.S. West and 22.4 percent of U.S. East visitors came with friends/business associates while about 13.2 percent of U.S. West and 8.2 percent of U.S. East visitors came alone.

#### **Japanese Visitors**

- About 49 percent of the Japanese visitors surveyed came with their spouses, 34.1 percent were with children, and 12.9 percent were with other family members.
- Compared to their U.S. counterparts, a slightly higher number of Japanese visitors surveyed traveled with friends or business associates (23.2%) while fewer came by themselves (4.4%).

#### **Canadian Visitors**

- A larger percentage of the Canadian visitors surveyed came with their spouses (57.8%) compared to respondents from the U.S. West, Japan and Europe.
- About 17.7 percent were with children, 20.9 percent with other family members, and 21.9 percent with friends or business associates.

#### **European Visitors**

- About 50.4 percent of the European respondents traveled to Hawaii with their spouses, while 8.4 percent came with children, and 11.1 percent with other family members. Another 19.4 percent of visitors traveled with friends or associates.
- A higher percentage of European visitors surveyed traveled with their girlfriends/boyfriends (11.8%) compared to respondents from the other markets.

**Table 8.1 Lifestyle/Lifestage and Visitation Status  
[Percentage of Visitors by MMA]**

	<b>U.S. TOTAL</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Lifestyle/Lifestage						
Wedding/Honeymoon	4.3	3.4	5.7	12.7	3.2	11.7
Family	19.4	22.0	15.4	32.0	17.9	8.4
Young	13.0	13.3	12.6	15.1	15.6	18.7
Middle Age	32.0	31.5	32.9	20.3	30.2	33.3
Seniors	31.2	29.8	33.3	20.0	33.1	28.0
Visitation Status						
First timers	31.4	21.1	47.3	44.3	43.9	71.6
Repeat visitors	68.6	78.9	52.7	55.7	56.1	28.4

**Table 8.2.1 Income Level – U.S. Total  
[Percentage of Visitors by Island]**

<b>Income</b>	<b>State</b>	<b>Oahu</b>	<b>Kauai</b>	<b>Maui</b>	<b>Big Island</b>
\$14,999 or less	1.6	2.2	1.7	1.2	2.2
\$15,000 - \$24,999	1.7	2.0	3.0	0.8	1.9
\$25,000 - \$29,999	1.8	2.3	1.7	1.0	1.2
\$30,000 - \$34,999	2.6	3.3	2.0	2.2	2.5
\$35,000 - \$39,999	2.9	3.4	2.7	2.4	2.7
\$40,000 - \$44,999	3.3	3.7	4.7	3.1	4.6
\$45,000 - \$49,999	3.7	3.9	2.5	3.9	4.3
\$50,000 - \$69,999	14.6	15.3	12.0	14.6	12.7
\$70,000 - \$99,999	19.2	18.9	17.8	20.4	22.6
\$100,000 - \$124,999	17.7	17.3	19.5	17.7	16.3
\$125,000 - \$149,999	8.1	7.6	7.8	7.9	6.7
\$150,000 or more	22.7	20.2	24.5	24.8	22.3



**Table 8.2.2 Income Level – U.S. West [Percentage of Visitors by Island]**

<b>Income</b>	<b>State</b>	<b>Oahu</b>	<b>Kauai</b>	<b>Maui</b>	<b>Big Island</b>
\$14,999 or less	2.1	2.7	0.0	1.6	1.5
\$15,000 - \$24,999	1.4	2.3	1.7	0.7	0.0
\$25,000 - \$29,999	1.0	1.1	3.5	0.0	0.0
\$30,000 - \$34,999	3.4	4.0	1.3	4.0	3.1
\$35,000 - \$39,999	3.5	3.0	0.0	5.7	2.4
\$40,000 - \$44,999	3.0	2.7	4.0	2.6	2.8
\$45,000 - \$49,999	3.8	3.7	1.3	3.0	3.3
\$50,000 - \$69,999	13.6	17.2	14.2	8.0	14.1
\$70,000 - \$99,999	17.1	16.5	21.4	13.4	21.5
\$100,000 - \$124,999	17.8	13.9	19.6	22.7	16.9
\$125,000 - \$149,999	9.0	9.2	8.4	11.8	6.4
\$150,000 or more	24.4	23.6	24.6	26.6	28.1

**Table 8.2.3 Income Level – U.S. East [Percentage of Visitors by Island]**

<b>Income</b>	<b>State</b>	<b>Oahu</b>	<b>Kauai</b>	<b>Maui</b>	<b>Big Island</b>
\$14,999 or less	1.9	2.3	2.2	1.8	2.9
\$15,000 - \$24,999	2.1	1.7	4.3	1.2	3.6
\$25,000 - \$29,999	1.9	1.8	1.3	1.4	1.4
\$30,000 - \$34,999	2.4	3.0	2.5	2.1	1.7
\$35,000 - \$39,999	3.6	4.0	3.2	2.7	3.0
\$40,000 - \$44,999	4.2	4.6	6.6	3.9	5.2
\$45,000 - \$49,999	4.5	4.5	4.2	5.5	5.1
\$50,000 - \$69,999	15.5	17.1	11.4	13.4	12.8
\$70,000 - \$99,999	20.4	21.5	18.8	21.8	24.7
\$100,000 - \$124,999	16.8	15.6	18.7	16.8	15.6
\$125,000 - \$149,999	6.1	6.1	5.2	5.5	4.5
\$150,000 or more	20.6	17.7	21.8	24.1	19.5

**Table 8.2.4 Income Level – Japan [Percentage of Visitors by Island]**

<b>Income in 10,000 Japanese Yen</b>	<b>State</b>	<b>Oahu</b>	<b>Kauai</b>	<b>Maui</b>	<b>Big Island</b>
Under 150	4.0	4.1	4.4	3.8	3.3
150 - 249.999	5.2	5.3	1.4	3.5	3.8
250 - 299.999	6.3	6.5	6.8	2.6	4.7
300 - 349.999	5.9	6.0	2.7	3.5	4.9
350 - 399.999	6.1	6.2	13.8	8.1	5.7
400 - 449.999	5.5	5.6	5.4	6.6	6.6
450 - 499.999	6.9	7.0	7.1	5.3	6.9
500 - 699.999	16.8	17.1	17.1	20.9	16.6
700 - 999.999	20.8	20.5	21.2	22.3	21.5
1,000 - 1,249.999	10.3	10.1	9.8	9.9	11.6
1,250 - 1,499.999	4.1	4.0	4.1	3.6	3.5
1,500 or more	8.1	7.8	6.3	10.0	11.0

**Table 8.2.5 Income Level – Canada [Percentage of Visitors by Island]**

<b>Income</b>	<b>State</b>	<b>Oahu</b>	<b>Kauai</b>	<b>Maui</b>	<b>Big Island</b>
\$14,999 or less	1.7	1.5	0.8	1.2	1.2
\$15,000 - \$24,999	2.8	3.4	0.7	1.2	3.0
\$25,000 - \$29,999	3.3	3.6	3.0	3.0	2.8
\$30,000 - \$34,999	3.3	3.9	4.0	3.4	3.0
\$35,000 - \$39,999	4.1	4.4	5.3	4.2	5.9
\$40,000 - \$44,999	4.6	5.0	3.3	4.3	5.6
\$45,000 - \$49,999	5.6	6.5	5.5	4.1	5.0
\$50,000 - \$69,999	16.1	17.2	16.5	14.7	15.8
\$70,000 - \$99,999	23.5	26.4	29.1	20.8	24.2
\$100,000 - \$124,999	11.5	10.6	12.6	14.2	15.1
\$125,000 - \$149,999	7.4	6.3	7.6	8.3	5.4
\$150,000 or more	16.2	11.2	11.5	20.6	13.1

**Table 8.2.6 Income Level – Europe [Percentage of Visitors by Island]**

Income	State	Oahu	Kauai	Maui	Big Island
\$14,999 or less	3.9	3.9	3.4	4.4	4.3
\$15,000 - \$24,999	4.8	4.9	1.8	4.6	3.2
\$25,000 - \$29,999	4.4	4.5	5.7	5.7	4.9
\$30,000 - \$34,999	5.1	5.5	5.0	5.6	6.4
\$35,000 - \$39,999	4.5	4.5	4.1	3.9	3.1
\$40,000 - \$44,999	5.5	5.9	4.3	4.7	3.7
\$45,000 - \$49,999	5.6	5.8	3.3	3.9	3.9
\$50,000 - \$69,999	16.2	18.2	17.8	16.7	19.7
\$70,000 - \$99,999	20.6	20.4	20.0	19.8	17.6
\$100,000 - \$124,999	11.7	11.0	13.8	13.3	12.6
\$125,000 - \$149,999	6.7	6.5	8.6	5.5	6.6
\$150,000 or more	11.0	8.9	12.3	12.0	13.9

**Table 8.3 Employment [Percentage of Visitors by MMA]**

Employment	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Working	71.2	70.5	72.2	62.7	68.1	73.0
Retired	16.6	16.4	16.9	8.6	22.2	17.4
Student	2.8	2.5	3.3	2.4	2.9	4.3
Homemaker	6.6	7.6	5.2	18.4	3.6	1.7
Other	2.7	2.9	2.4	7.9	3.3	3.6

**Table 8.4 Education [Percentage of Visitors by MMA]**

Education	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
No high school	0.1	0.1	0.2	2.0	0.7	3.7
Some high school	0.9	0.5	1.4	0.7	3.7	6.4
High school grad	6.6	6.2	7.1	30.6	12.3	15.2
Some college	18.4	17.9	19.2	1.9	16.4	12.4
2-year degree	9.8	10.2	9.1	14.8	8.0	4.9
4-year degree	32.7	33.2	32.0	36.2	29.0	24.9
Post grad degree	28.3	28.4	28.2	4.2	21.6	21.0
Vocational/technical	3.2	3.4	2.9	9.5	8.3	11.6

**Table 8.5 Gender and Age [Percentage of Repeat Visitors by MMA]**

	<b>US TOTAL</b>	<b>US West</b>	<b>US East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Gender						
male (%)	44.4	43.9	45.3	47.1	48.1	57.8
female (%)	55.6	56.1	54.7	52.9	51.9	42.2
What is your age?						
Median (years)	49.0	49.0	49.0	43.0	49.0	45.4

**Table 8.6 Relationship with Hawaii [Percentage of Visitors by MMA]**

	<b>U.S. Total</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
Lived in Hawaii before						
yes	9.3	11.3	6.4	1.3	2.5	2.3
no	90.7	88.7	93.6	98.7	97.5	97.7
Have friends and/or relatives in Hawaii						
yes	42.7	47.9	34.8	15.6	19.8	16.2
no	57.3	52.1	65.2	84.4	80.2	83.8
Do you own property in Hawaii?						
Own time share property in Hawaii	6.4	6.9	5.7	2.4	4.3	0.6
Own other types of property in Hawaii	3.2	4.7	0.9	0.5	1.8	0.5
None	90.4	88.4	93.3	97.0	93.9	99.0

**Table 8.7 Accommodation Usage by Island [Percentage of Visitors by MMA]**

<b>Accommodation</b>	<b>U.S. West</b>	<b>U.S. East</b>	<b>Japan</b>	<b>Canada</b>	<b>Europe</b>
<b>Oahu</b>					
Hotel	70.3	75.4	90.8	68.5	84.4
Condo	6.0	5.3	7.9	13.6	3.0
Bed & Breakfast	0.1	0.2	0.1	0.8	1.6
Time Share	4.2	5.3	1.0	5.8	1.4
Friends or Family's Home	19.1	11.4	1.6	7.6	6.3
Home I Own	0.5	0.0	0.3	0.1	0.0
Home that I Rented	2.1	1.5	0.1	1.2	2.2
Cruise Ship	1.9	4.8	0.0	6.1	3.0
Other Accom	1.6	2.3	0.1	2.4	2.1
<b>Maui</b>					
Hotel	35.3	47.8	79.5	23.1	53.3
Condo	41.1	19.8	16.4	45.3	12.6
Bed & Breakfast	2.2	1.4	0.4	1.7	6.4
Time Share	10.6	9.0	1.6	6.5	2.7
Friends or Family's Home	12.1	4.6	4.2	3.3	5.9
Home I Own	1.4	0.2	0.4	0.1	0.1
Home that I Rented	1.2	0.6	0.0	1.9	4.5
Cruise Ship	5.2	18.5	0.3	22.7	16.4
Other Accom	2.0	1.8	1.1	0.9	3.3
<b>Big Island</b>					
Hotel	49.8	44.6	89.6	30.3	60.8
Condo	18.9	12.8	5.4	10.9	5.8
Bed & Breakfast	2.6	5.7	0.1	4.5	7.5
Time Share	14.2	10.9	2.1	13.6	3.0
Friends or Family's Home	11.1	5.5	2.8	6.4	4.8
Home I Own	2.2	0.1	0.6	0.0	0.2
Home that I Rented	4.4	2.5	0.7	3.3	3.1
Cruise Ship	8.5	26.0	0.5	37.5	18.4
Other Accom	2.7	2.5	0.9	3.2	7.8
<b>Kauai</b>					
Hotel	30.8	30.1	74.8	20.0	49.6
Condo	25.1	15.2	23.5	15.7	8.2
Bed & Breakfast	3.2	1.5	0.0	1.3	5.7
Time Share	22.4	20.9	2.3	12.4	5.1
Friends or Family's Home	4.7	2.1	0.9	3.3	4.2
Home I Own	2.2	0.2	0.0	0.4	0.0
Home that I Rented	8.3	4.2	0.0	3.8	3.6
Cruise Ship	8.5	29.7	2.0	45.9	23.6
Other Accom	1.3	1.3	0.9	1.4	3.8

**Table 8.8 Travel History [Percentage of Visitors by MMA]**

Past Trips	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
How many trips have you taken in the past 3 years?						
1 trip	6.4	6.5	6.1	8.2	6.6	6.7
2 to 4 trips	38.9	37.2	41.6	36.6	40.1	29.4
5 to 9 trips	32.8	32.7	32.9	32.4	33.2	37.9
10 or more trips	21.9	23.6	19.4	22.8	20.1	26.0
Long distant travel (>1,000 miles from Home)						
yes	85.7	87.0	83.6	65.7	87.7	89.7
no	14.3	13.0	16.4	34.3	12.3	10.3

**Table 8.9 Places Visited in the Past Five Years [Percentage of Visitors by MMA]**

	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
California	44.3	45.8	42.1	6.7	34.0	46.8
Florida	37.8	29.6	50.5	2.7	30.4	27.9
Las Vegas	45.0	49.9	37.3	7.9	29.8	38.8
New York City	26.6	23.7	31.1	4.6	16.0	28.4
Other U.S.	52.0	52.4	51.3	8.4	42.3	37.6
Bali	0.7	0.9	0.4	5.6	1.5	4.0
China	4.4	5.5	2.7	12.9	4.0	8.4
Fiji	0.8	0.9	0.5	0.6	1.2	2.0
Guam/Saipan	1.2	1.5	0.8	18.7	0.5	0.5
Korea	1.3	1.4	1.2	18.1	0.5	1.6
Thailand	3.7	5.0	1.8	10.1	3.2	9.8
Other Asia	6.6	8.0	4.4	15.0	4.9	15.5
Australia/New Zealand	5.2	5.2	5.1	14.1	6.8	19.1
Canada	21.0	21.3	20.5	5.8	43.8	18.0
Caribbean	20.6	14.6	29.9	0.6	25.2	19.5
Mexico	29.0	32.2	24.1	1.4	29.1	13.3
Other	25.3	26.6	23.3	14.6	24.6	34.0

**Table 8.10 Primary Purpose of Trip [Percentage of Visitors by MMA]**

Primary Purpose of Trip	US TOTAL	US West	US East	Japan	Canada	Europe
Vacation	64.4	65.0	63.6	65.9	79.0	71.4
Business meeting/conduct business	7.8	7.9	7.6	1.3	3.2	2.0
Convention, conference, seminar	5.1	3.8	7.1	1.1	3.1	4.5
Incentive/reward	1.3	1.1	1.5	2.4	1.4	1.0
Visit friends/relatives	8.5	9.3	7.1	1.9	4.2	4.4
Get married	0.7	0.6	0.9	2.6	0.5	1.4
Attend/participate in wedding	3.5	3.8	2.9	6.0	2.6	1.6
Honeymoon	3.0	2.2	4.3	9.1	2.3	8.6
Sports event	1.2	1.3	1.0	1.9	1.9	1.2
Cultural event	0.1	0.1	0.2	0.3	0.0	0.1
Medical treatment	0.0	0.0	0.0	0.1	0.0	0.0
Shopping/fashion	0.0	0.0	0.0	3.4	0.0	0.0
Other	4.4	4.8	3.8	4.1	1.8	3.8

**Table 8.11 Secondary Purpose of Trip [Percentage of Visitors by MMA]**

Secondary Purpose of Trip	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Vacation	45.3	43.1	48.9	19.6	44.3	46.6
Business meeting/conduct business	6.8	7.2	6.2	1.5	2.2	2.3
Convention, conference, seminar	1.1	1.3	0.8	0.8	1.5	1.5
Incentive/reward	2.8	2.9	2.8	1.8	3.3	1.8
Visit friends/relatives	21.3	23.4	18.1	4.4	21.2	16.0
Get married	0.3	0.2	0.4	1.1	0.2	1.5
Attend/participate in wedding	1.4	1.9	0.7	2.9	1.8	0.9
Honeymoon	1.6	1.7	1.5	3.6	1.2	4.5
Sports event	2.0	2.2	1.6	2.5	2.8	3.5
Cultural event	1.0	1.1	0.8	1.3	1.1	1.7
Medical treatment	0.1	0.2		0.3	0.6	0.4
Shopping/fashion	2.9	3.3	2.2	52.6	6.6	7.3
Other	13.3	11.4	16.2	7.8	13.3	12.2

**Table 8.12 Companion Type [Percentage of Visitors by MMA]**

Income	U.S. Total	U.S. West	U.S. East	Japan	Canada	Europe
Spouse	49.7	45.9	55.4	49.0	57.8	50.4
With kids	19.4	22.2	15.1	34.1	17.7	8.4
Other family	22.8	22.0	24.1	12.9	20.9	11.1
Friends/bus assoc	21.4	20.8	22.4	23.2	21.9	19.4
Girl/boy friend	6.6	6.5	6.8	2.7	6.2	11.8
Same sex partner	2.4	2.7	1.9	2.2	0.9	1.9
Alone	11.2	13.2	8.2	4.4	8.4	10.9
Other	2.1	1.6	2.9	2.9	2.9	2.1

## 9. DEFINITIONS AND SURVEY METHODOLOGY



## DEFINITION AND SURVEY METHODOLOGY

### Definitions

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

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

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

### Visitor Lifestyle and Life-Stage:

- Wedding/Honeymoon visitors: Visitors whose primary and secondary purpose of trip are getting married or to honeymoon.
- Family: Visitors traveling with kids under 18 years of age and are not in the above life stage.
- Young: Visitors between 18 and 34 years of age and are not in the above life stages.
- Middle Age: Visitors between 35 and 54 years of age and are not in the above life stages.
- Seniors: Visitors 55 years of age or over and are not in the above life stages.

## Survey Methodology

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

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

There are two versions of the Visitor Satisfaction Survey form, one in English and the other in Japanese. The 2005 survey has 8 pages and 33 questions.

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

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

In 2005, a total of 10,575 questionnaires were mailed to Japanese visitors, 3,562 of which responded, translating into a response rate of 33.7 percent. 10,577 questionnaires were mailed to U.S. visitors, 3,412 of which were returned or a response rate of 32.3 percent. A total of 10,578 survey forms were mailed to Canadian and European visitors during 2005, 3,375 of which responded, yielded a response rate of 31.9 percent. Sampling errors are calculated to be 2.3 percent for U.S. West visitors, 2.4 percent for U.S. East visitors, 1.6 percent for Japanese visitors, 2.6 percent for Canadian visitors, and 2.2 percent for European visitors.

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

Starting in 2005, visitors' satisfaction and rating of their experiences will be reported on a destination by destination basis instead of an aggregated statewide measure. The data collection methodology was changed to better reflect the specificity and uniqueness of each island. Respondents were asked to select only one island to rate based on the location where they stayed the most nights. This resulted in responses unevenly distributed between islands; mainly concentrated on Oahu, Maui and Kauai. Therefore, data limitations hamper us from reporting fully on Lanai, Molokai, and to a lesser extent, Kona and Hilo.

10. 2005 VISITOR SATISFACTION  
SURVEY FORM (ENGLISH VERSION)



## 2005 VISITOR SATISFACTION SURVEY

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

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

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

1. **Overall, how would you rate your most recent trip in Hawai'i?**
  - Excellent
  - Above average
  - Below average
  - Poor
  
2. **Would you say this trip to Hawai'i...?**
  - Exceeded your expectations
  - Met your expectations
  - Did not meet your expectations
  
3. **How likely are you to recommend Hawai'i as a vacation place to your friends and relatives?**
  - Very likely
  - Somewhat likely
  - Not too likely
  - Not at all likely

- 4a. **How likely are you to visit Hawai'i in the next five years?**
  - Very likely
  - Somewhat likely
  - Not too likely
  - Not at all likely

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

- 4b. **Why would you be unlikely to revisit Hawai'i? (*Mark all that apply*).**
  - Flight is too long
  - Too commercial/overdeveloped
  - Too crowded/congested
  - Not enough value for the price
  - Want to go someplace new
  - Other (Specify at right) \_\_\_\_\_

- 5a. What was the primary purpose of your most recent trip to Hawai'i?  
 5b. And what, if any, was the secondary purpose of your most recent visit?

	Q5a. Primary Purpose (one answer only)	Q5b. Secondary Purpose
Vacation-----	<input type="radio"/>	<input type="radio"/>
Attend a business meeting or conduct business-----	<input type="radio"/>	<input type="radio"/>
Attend a convention, conference or seminar-----	<input type="radio"/>	<input type="radio"/>
Incentive/reward-----	<input type="radio"/>	<input type="radio"/>
Visit friends or relatives-----	<input type="radio"/>	<input type="radio"/>
Get married-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a wedding-----	<input type="radio"/>	<input type="radio"/>
Honeymoon-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a sporting event-----	<input type="radio"/>	<input type="radio"/>
Attend/participate in a cultural/historical event-----	<input type="radio"/>	<input type="radio"/>
Medical treatment-----	<input type="radio"/>	<input type="radio"/>
Shopping/fashion-----	<input type="radio"/>	<input type="radio"/>
Other (please specify) _____-----	<input type="radio"/>	<input type="radio"/>

- 6a. Please mark if you visited any of the following places.  
 6b. If you stayed overnight or longer, how many nights did you stay at each place? (Write 0 if day only trip)

	Q6a. Visited	Q6b. Number of Nights
Island of Oahu (Waikiki/Honolulu)-----	<input type="radio"/>	<input type="text"/>
Island of Maui-----	<input type="radio"/>	<input type="text"/>
Island of Moloka'i-----	<input type="radio"/>	<input type="text"/>
Island of Lana'i-----	<input type="radio"/>	<input type="text"/>
Big Island of Hawai'i (Hilo/Kona)-----	<input type="radio"/>	<input type="text"/>
Island of Kaua'i-----	<input type="radio"/>	<input type="text"/>

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

	Hotel	Condo	B&B	Time Share	Friends' or Family's Home	Home I Own	Home that I Rented	Cruise Ship	Other
Island of Oahu (Waikiki/Honolulu)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island of Maui	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island of Moloka'i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island of Lana'i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Big Island of Hawai'i (Hilo)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Big Island of Hawai'i (Kona)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island of Kaua'i	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Please indicate where you stayed the most nights on your most recent trip. *(Please choose one below)*

- O'ahu   
  Maui   
  Moloka'i   
  Lana'i   
  Kaua'i  
 Big Island of Hawai'i (Hilo)   
  Big Island of Hawai'i (Kona)

For the location you have indicated above, how satisfied were you with...

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Not Satisfied At all	Not Applicable
<b>Accommodations (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
location -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
facility -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
cleanliness and comfort -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Restaurants (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
location -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
variety of choices -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
quality and taste of the food -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Shopping (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
a sufficient number of shopping places -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
locations -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
variety of merchandise -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
quality of merchandise -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Golf Courses (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
locations -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Activities &amp; Attractions (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
exciting -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
variety of choices -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Transportation by bus, taxi, trolley (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
convenience -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
cleanliness and comfort -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
efficiency -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
value for your money -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Airports (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
signage -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
cleanliness and comfort -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ease of getting around -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
availability of food -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
availability of shopping -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
friendliness of workers -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Parks &amp; Beaches (overall)</b> -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
security -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
facility -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
cleanliness and comfort -----	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

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

18. Not counting this trip to Hawai'i, how many vacations and overnight pleasure trips have you taken in the past 3 years?

- 1 trip
- 2-4 trips
- 5-9 trips
- 10 or more trips

Please specify  
Year of Last Visit  
to Hawai'i

--	--	--	--

19. Not counting this trip to Hawai'i, have you vacationed more than 1,000 miles from your home in the past 3 years?

- Yes [IF YES, ANSWER Q19a]
- No [IF NO, SKIP TO Q20]

19a. Which of the following destinations have you visited in the past 5 years? (Mark all that apply)

- Oahu
- Big Island of Hawai'i (Hilo/Kona)
- Maui
- Kauai
- Molokai
- Lanai
- California
- Florida
- Las Vegas
- New York City
- Other U.S.
- Bali
- China
- Fiji
- Guam/Saipan
- Korea
- Thailand
- Other Asia
- Australia/New Zealand
- Canada
- Caribbean
- Mexico
- Other (Specify) \_\_\_\_\_

20. Did you ever live in Hawai'i before?

- Yes
- No

21. Do you have friends and/or relatives who live in Hawai'i?

- Yes
- No

22. Do you own property in Hawai'i?

- Yes, I own timeshare units
- Yes, I own other types of property
- No

23. Please indicate your highest level of educational training:

- No high school
- Some high school
- High school graduate
- Some college
- Associates (2 year) degree
- College graduate (4 year)
- Post graduate degree
- Vocational/technical

24. Which of the following categories includes your household's total annual income from all sources before taxes for 2004 (in US dollars)?

- Up to \$15,000
- \$15,000 to \$24,999
- \$25,000 to \$29,999
- \$30,000 to \$34,999
- \$35,000 to \$39,999
- \$40,000 to \$44,999
- \$45,000 to \$49,999
- \$50,000 to \$69,999
- \$70,000 to \$99,999
- \$100,000 to \$124,999
- \$125,000 to \$149,999
- \$150,000 or more

25. What is your age?

--	--

26. What is your gender?

- Male
- Female

27. What is your employment status?

- Working
- Retired
- Student
- Homemaker
- Other

28. On your most recent trip, what airport did you first arrive in Hawai'i?

- Honolulu International Airport on O'ahu
- Kahului Airport on Maui
- Kona International Airport on Hawai'i
- Hilo International Airport on Hawai'i
- Lihue Airport on Kaua'i
- Lana'i Airport on Lana'i

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

- Excellent
- Above average
- Below average
- Poor

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

- Yes
- No

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

- Yes
- No

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

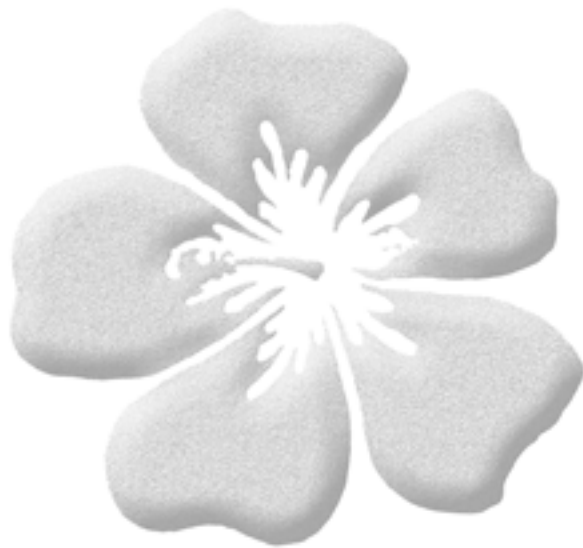
- Wallet/purse/valuables stolen
- Room was vandalized/robbed
- Car was vandalized/robbed
- Physical violence/harm
- Solicited by prostitutes
- Solicited by drug dealers
- Received parking or other auto violations
- None of the above

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

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

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

*Please come for another visit to the islands of Aloha soon!*



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