

Visitor Satisfaction Study

Q4 2021

Prepared for:
Hawai'i Tourism Authority

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METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. For Q4 2021, the sampled visitor markets include: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), and U.S. East (all other states in the Continental U.S.).

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	1,314	2.70%	14.13%
U.S. East	1,206	2.82%	12.97%
All visitor markets	2,520	1.95%	13.55%

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

METHODOLOGY – OVERALL (cont.)

Monthly samples of visitors who stayed for at least two days are drawn from completed the Domestic In-Flight database. Selected U.S. visitors were sent an email invitation with a link to complete the survey online.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both visitor markets were reported as weighted data based on weights generated for 2021 Q4. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

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

METHODOLOGY – Effect of COVID-19

COVID-19 Travel Restrictions

Concerns around the continuing COVID-19 pandemic have resulted in significant travel restrictions and limited flights to Hawai'i from Canada, China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter.

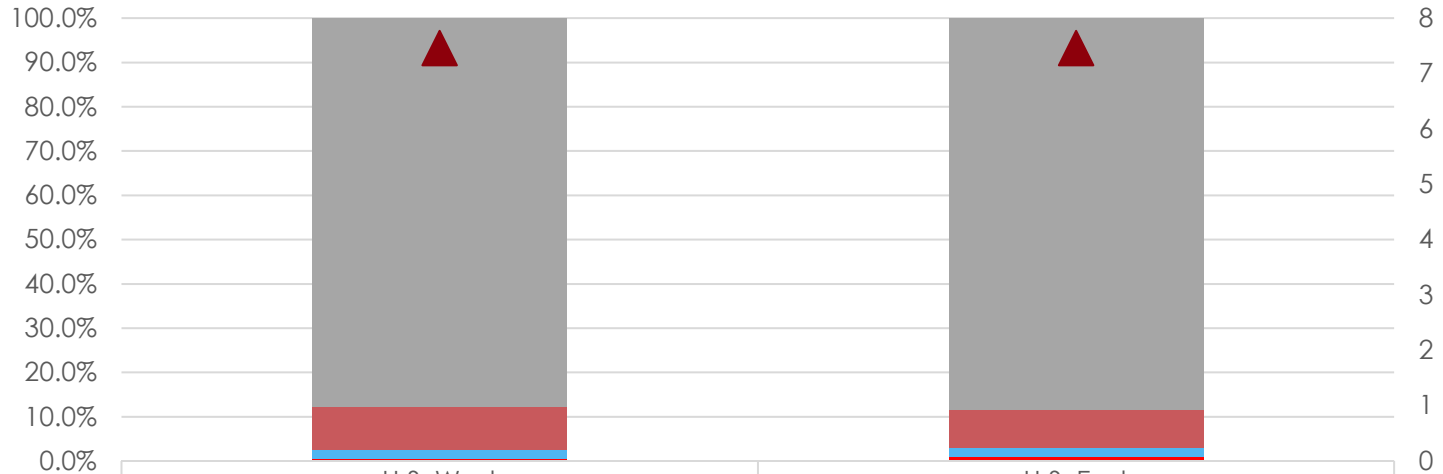
State of Hawai'i Safe Travels Program

On March 26, 2020, the State of Hawai'i started requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. Then on October 15, 2020, the State of Hawaii Safe Travels program began, which allowed all visitors and returning residents to avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawai'i. On December 4, 2020 the mandatory quarantine period for all those who did not have a negative test result was reduced from 14 days to 10 days. On July 8, 2021, the State of Hawai'i launched a vaccination exception program for domestic, Hawai'i-bound travelers vaccinated in the United States or U.S Territories. The program allows these travelers to bypass the state's quarantine requirement with proof of vaccination.

SECTION 1 – VISITOR SATISFACTION

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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



	U.S. West	U.S. East
■ Excellent (7-8)	87.8%	88.4%
■ Above Avg (5-6)	9.7%	8.6%
■ Below Avg (3-4)	2.2%	2.0%
■ Poor (1-2)	0.4%	1.0%
BASE	1,206	1,314
▲ MEAN	7.46	7.46

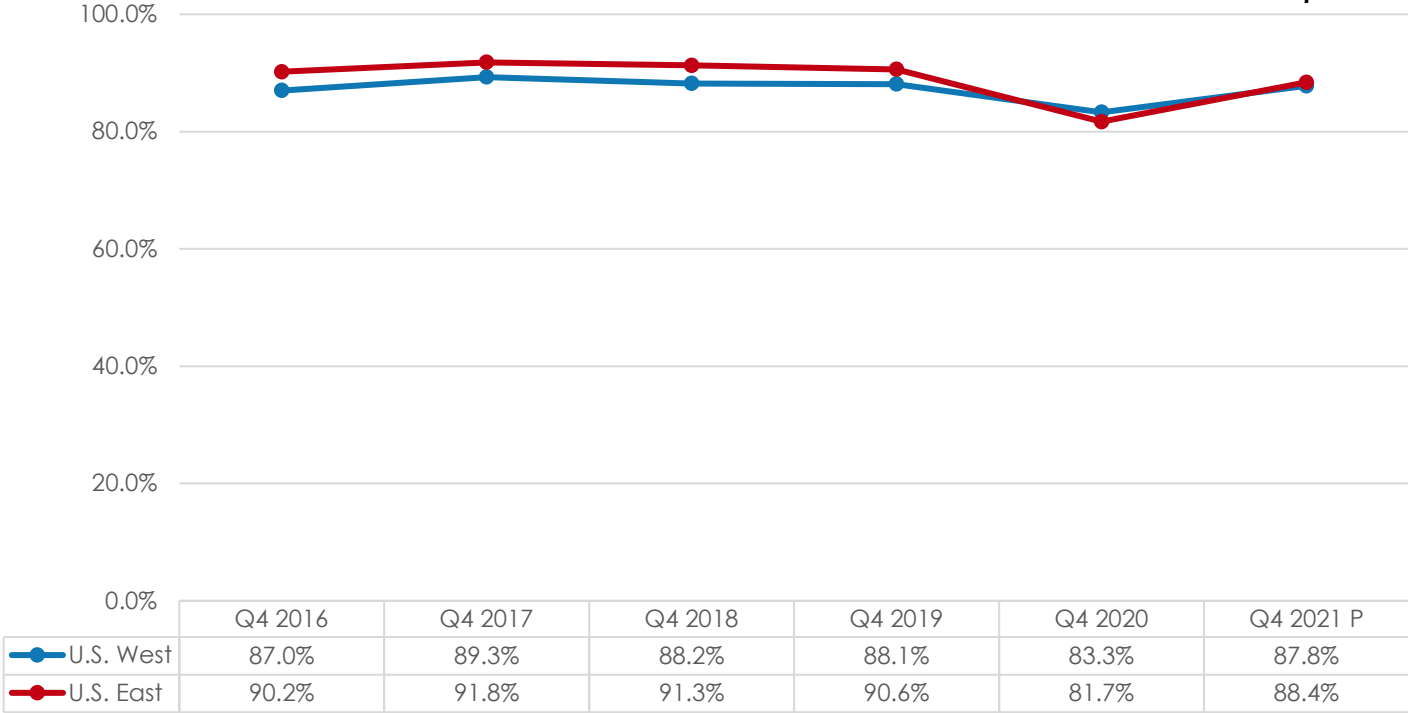
SATISFACTION – STATE OF HAWAI'I BY VISITOR MARKET

- **Visits to the state:** Overall satisfaction with Hawai'i was higher amongst first-time visitors from U.S. West.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than male visitors.

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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

TopBox satisfaction scores have rebounded to pre-pandemic levels.

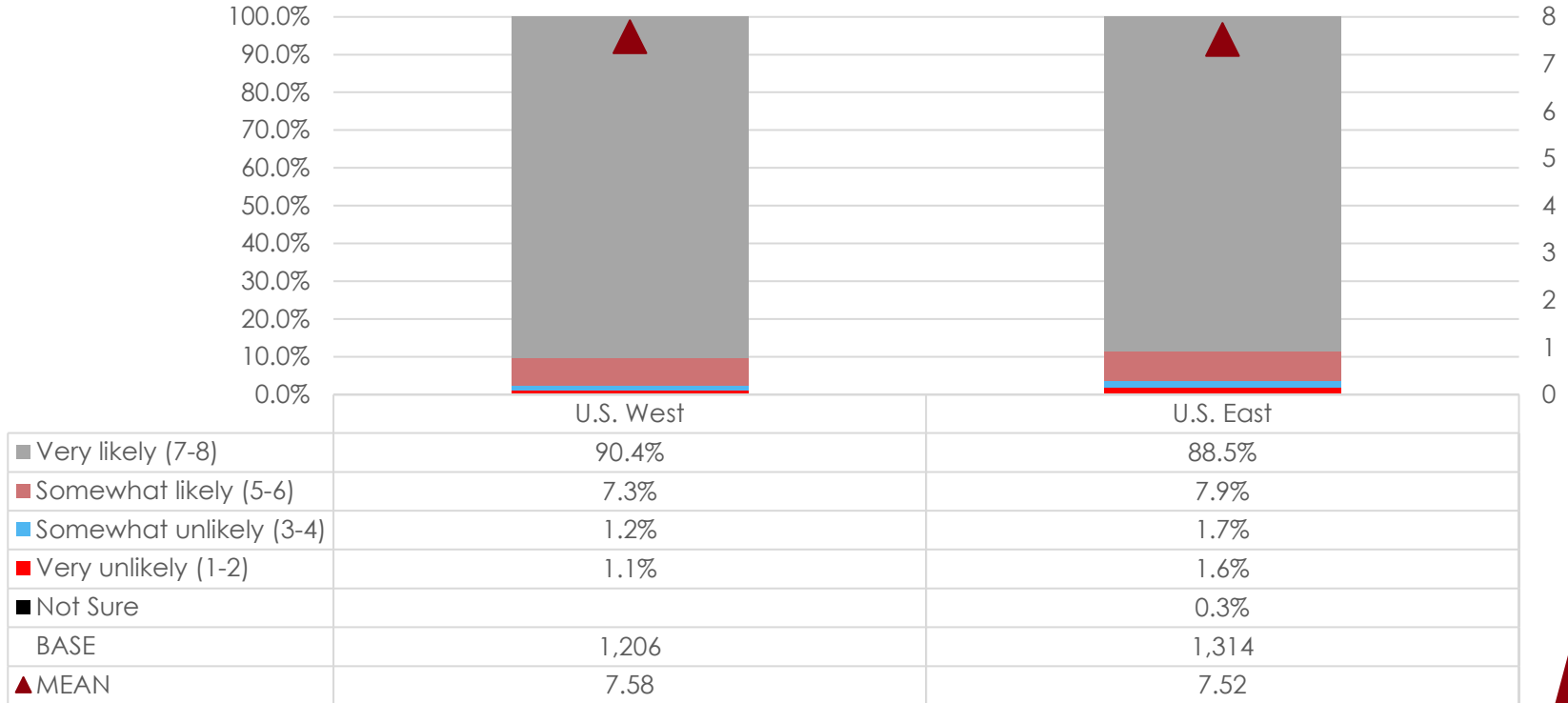


P= Preliminary Data



BRAND/DESTINATION – ADVOCACY

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

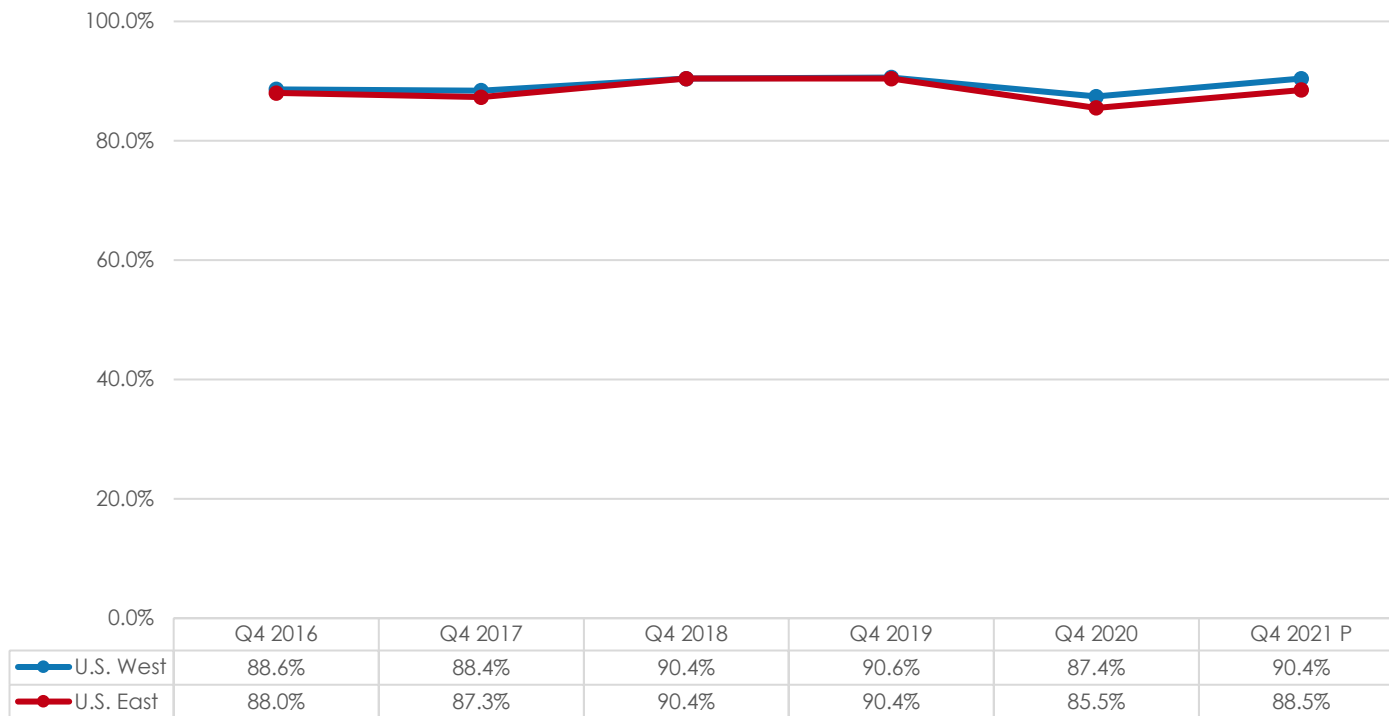


BRAND/DESTINATION – ADVOCACY

- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to male visitors.
- **Education:** College graduates from U.S. West were stronger brand advocates for the state compared to those without a college degree from this visitor market.
- **Household income:** Amongst travelers from U.S. West brand advocacy was strongest amongst the least affluent.

BRAND/DESTINATION – ADVOCACY

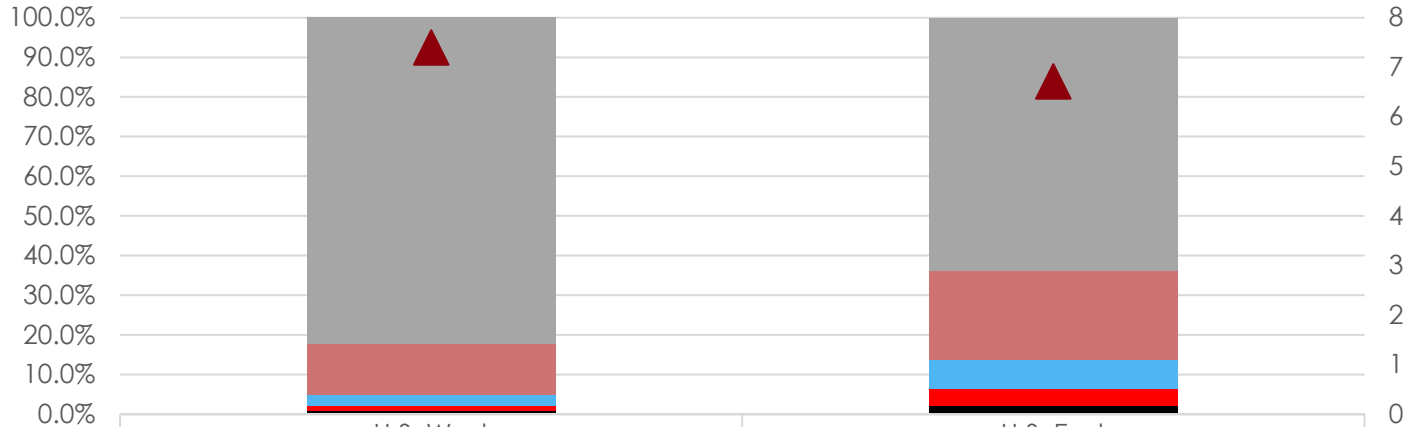
TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



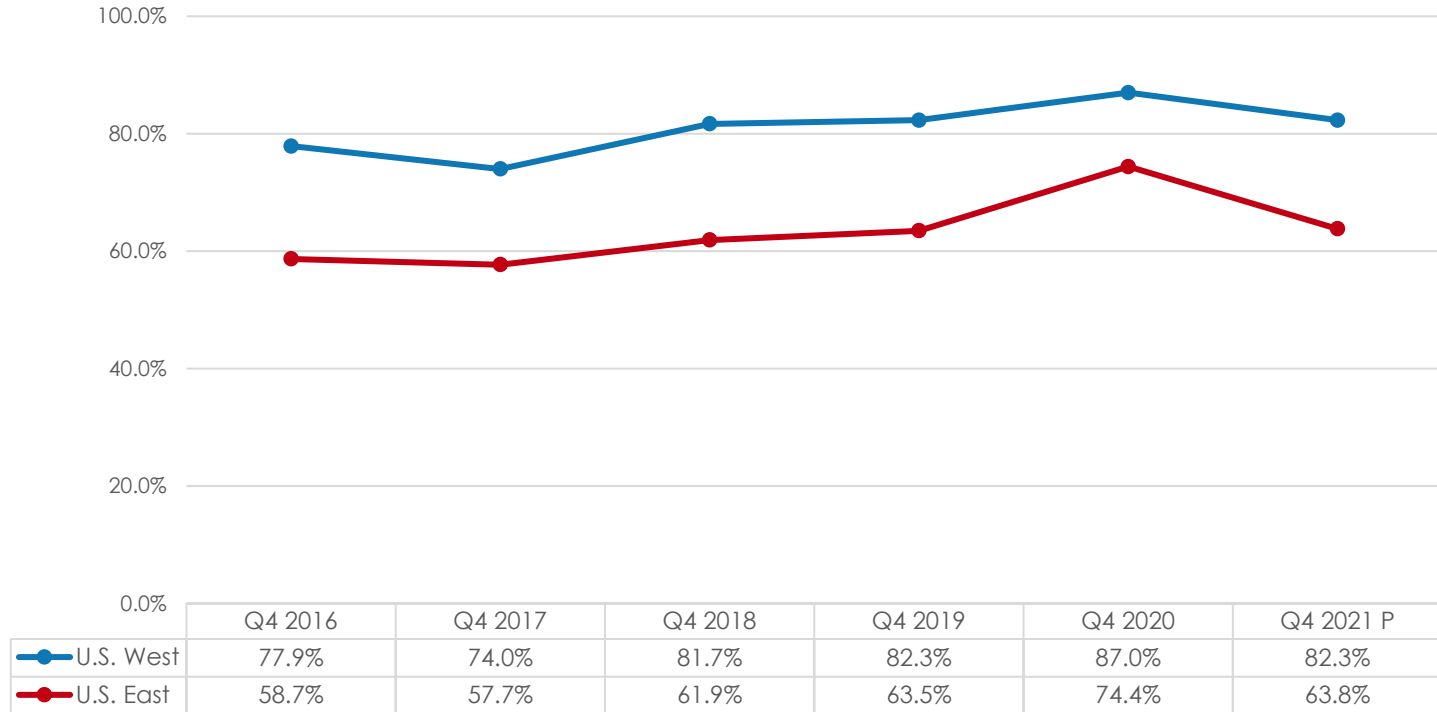
	U.S. West	U.S. East
■ Very likely (7-8)	82.3%	63.8%
■ Somewhat likely (5-6)	12.8%	22.4%
■ Somewhat unlikely (3-4)	2.7%	7.4%
■ Very unlikely (1-2)	1.4%	4.3%
■ Not Sure	0.8%	2.1%
BASE	1,206	1,314
▲ MEAN	7.40	6.71

LIKELIHOOD OF RETURN VISIT

- **Visitor market:** Travelers from U.S. West were more likely to return to the state in the next five years compared to those from U.S. East.
- **Gender:** Female travelers from U.S. West showed a greater likelihood to return to the state than males from this visitor market.
- **Repeat vs First-time:** Repeat visitors from U.S. West expressed a stronger likelihood of returning to the islands in the next five years compared to first-time visitors.
- **Travel agent:** Visitors from U.S. East who did not use a travel agent expressed a greater likelihood to return to the state compared to those from this market who used a travel agent.
- **Travel party size:** Those who traveled in smaller travel parties expressed a greater likelihood of returning to the state from both visitor markets.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q4 2020	Q4 2021 P
36.3% COVID-19	39.3% Too expensive
26.1% Too expensive	29.6% Poor value
24.2% Unfriendly people/ felt unwelcome	28.0% Want to go someplace new
17.1% Poor value	23.0% COVID-19
16.8% Want to go someplace new	19.2% Too crowded/ congested
14.5% No compelling reason to return	16.7% Flight too long
13.0% Poor service	15.1% No compelling reason to return
	11.3% Unfriendly people/ felt unwelcome

P= Preliminary Data

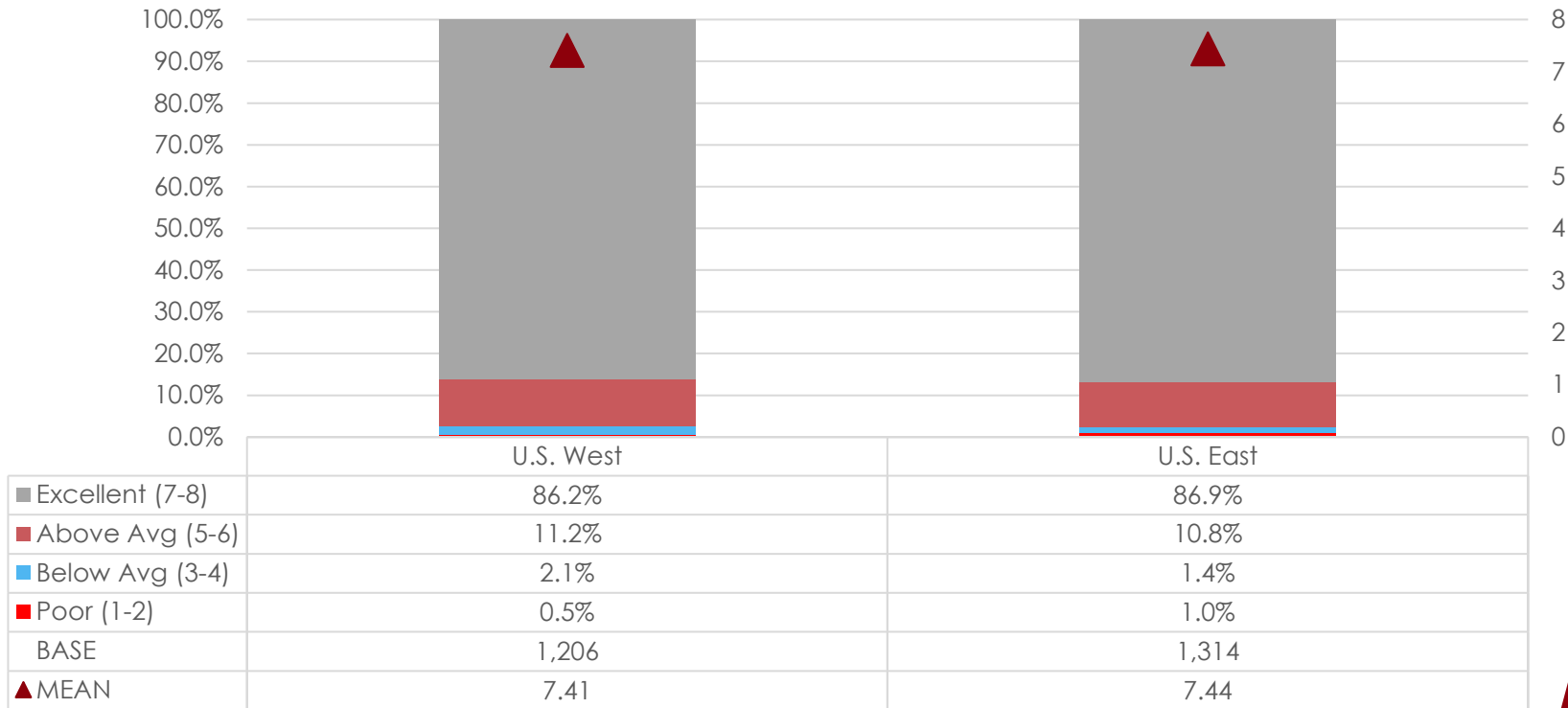
UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q4 2020	Q4 2021 P
31.2% Too expensive	46.7% Too expensive
27.7% COVID-19	36.0% Flight is too long
26.7% Want to go someplace new	28.8% Want to go someplace new
21.3% Flight is too long	21.6% Poor value
20.0% Unfriendly people/ Felt unwelcome	13.8% COVID-19
14.6% Poor value	12.3% Other financial obligations
13.1% Poor service	11.6% Too crowded/ congested
11.3% Five years is too soon	
10.6% No compelling reason to return	

P= Preliminary Data

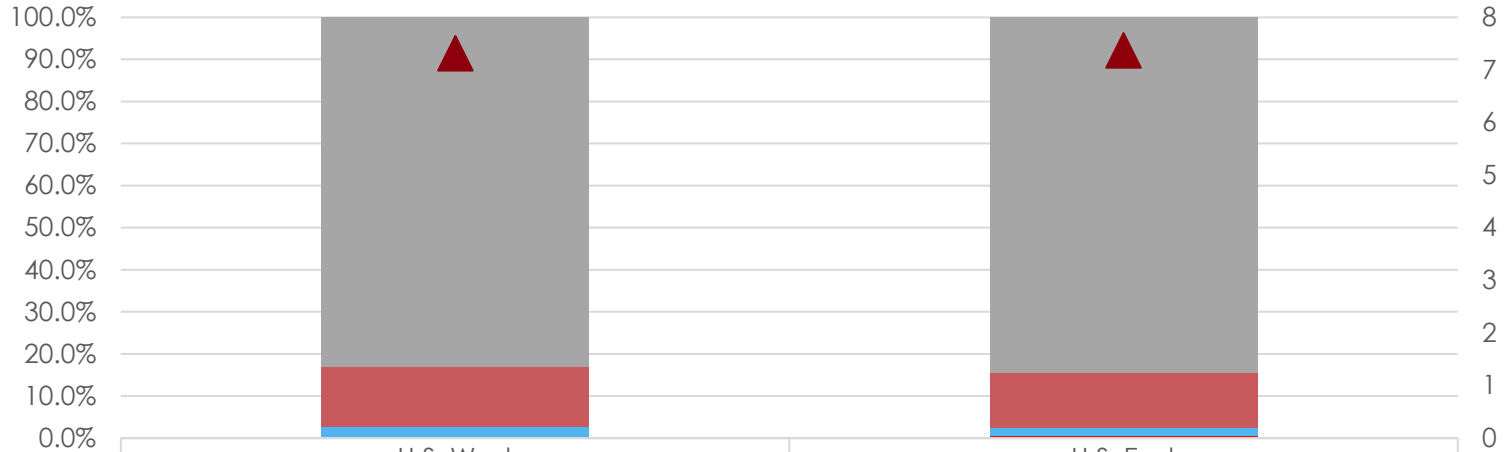
OFFERING A VARIETY OF EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

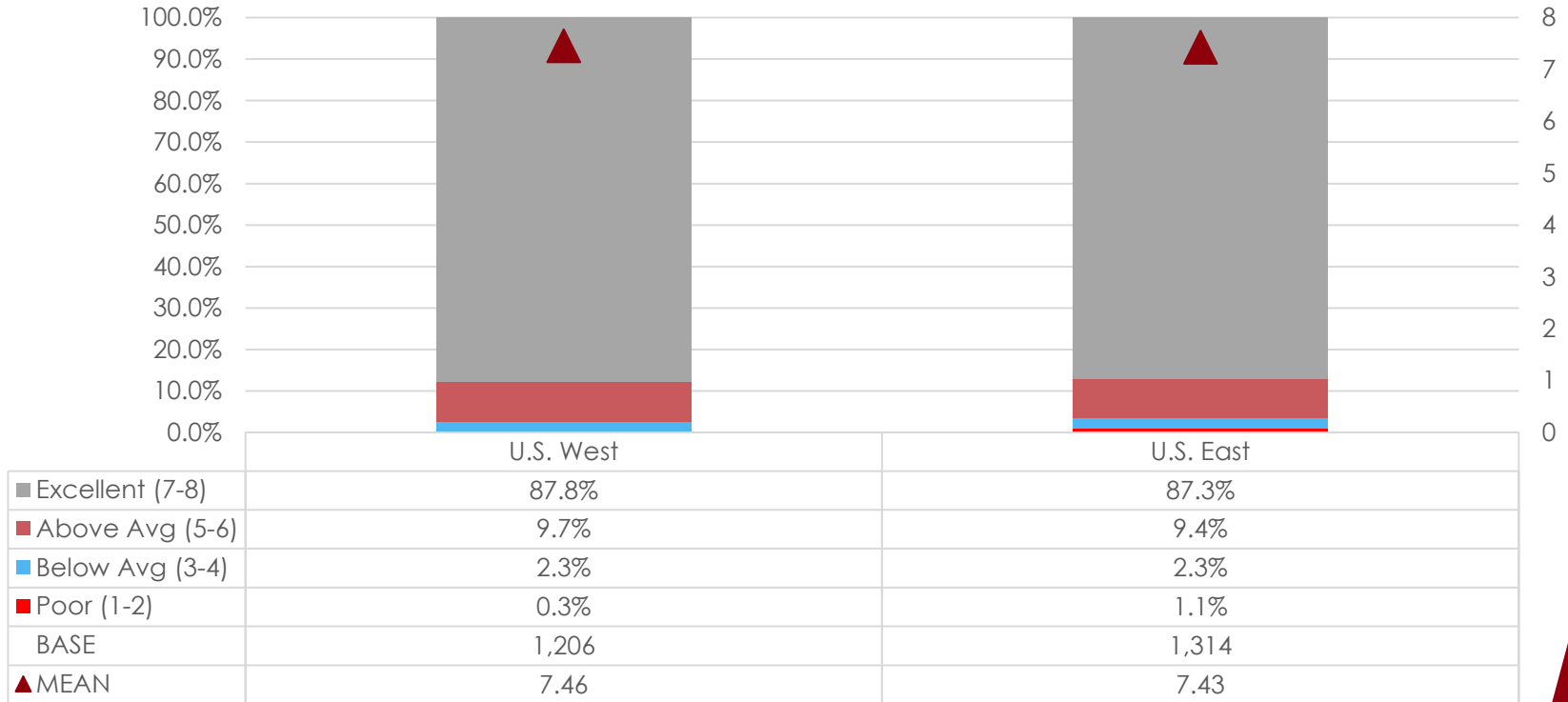
8-pt Rating Scale
8=Excellent / 1=Poor



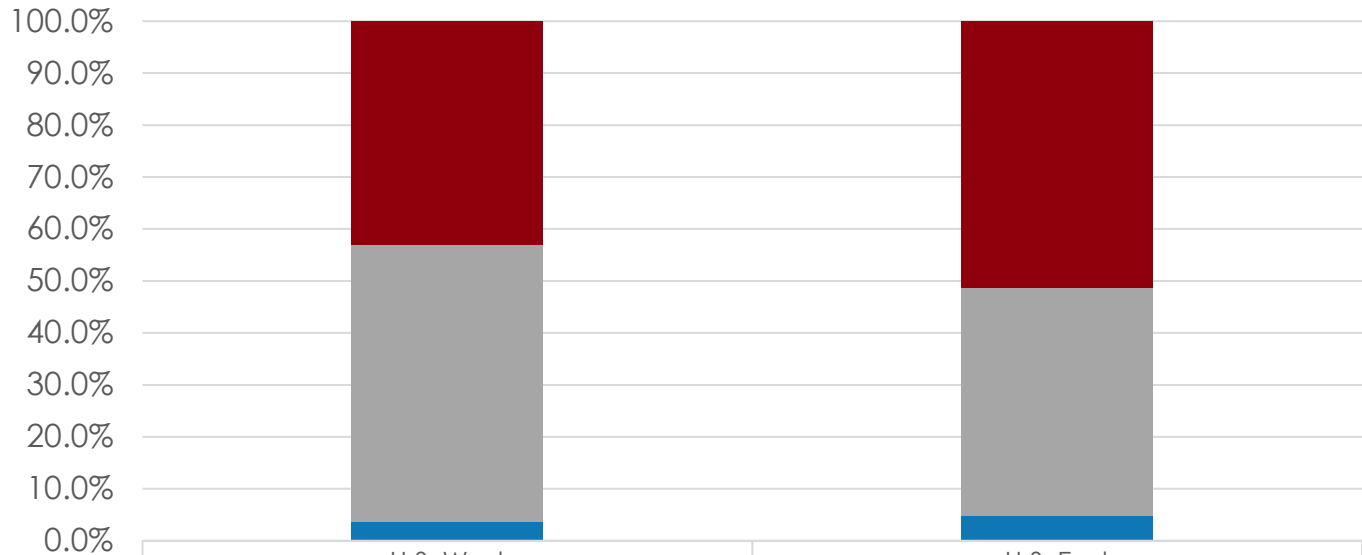
	U.S. West	U.S. East
■ Excellent (7-8)	83.0%	84.6%
■ Above Avg (5-6)	14.2%	13.1%
■ Below Avg (3-4)	2.4%	1.7%
■ Poor (1-2)	0.3%	0.7%
BASE	1,206	1,314
▲ MEAN	7.32	7.37

BEING A SAFE AND SECURE DESTINATION

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



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



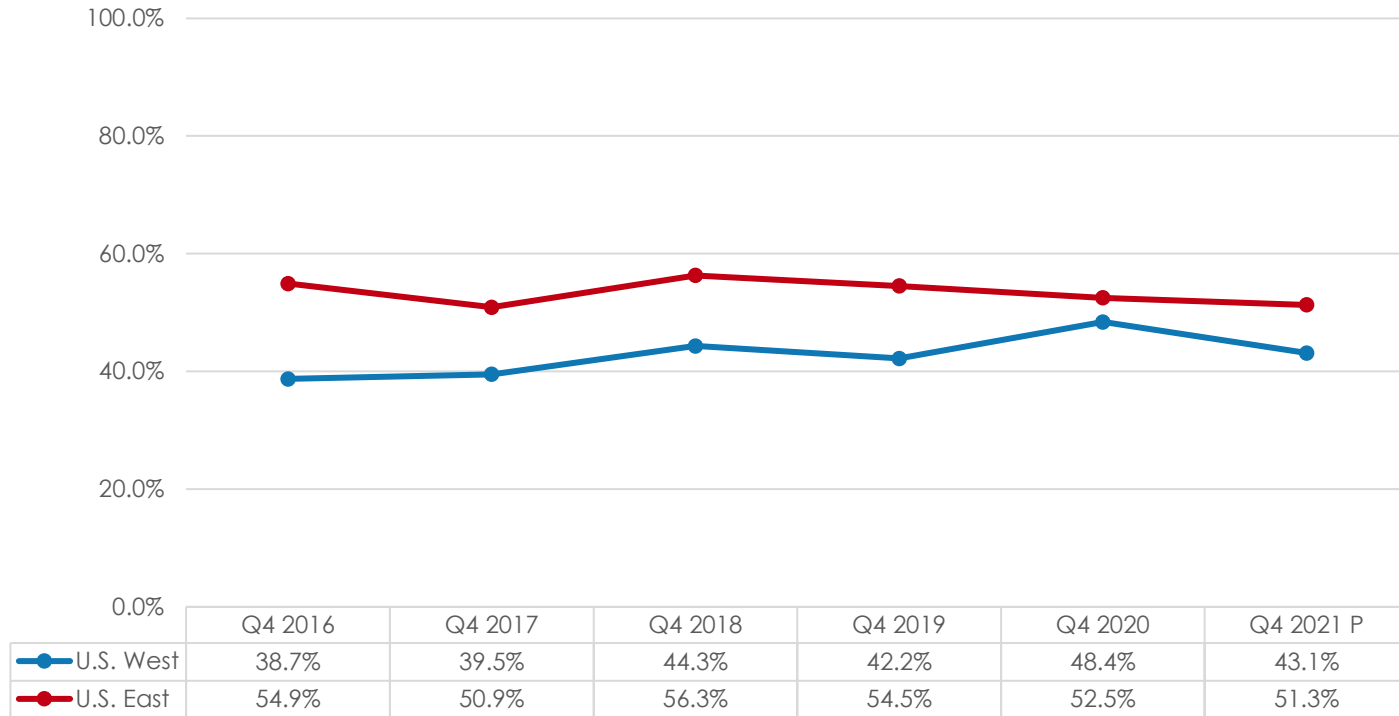
	U.S. West	U.S. East
■ Exceeded expectations	43.1%	51.3%
■ Met expectations	53.3%	43.7%
■ Did NOT meet expectations	3.7%	4.9%
BASE	1,206	1,314

SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Visitor Market:** Visitors from U.S. East were more likely to feel their trip exceeded their expectations compared to travelers from U.S. West.
- **Trips to HI:** First-time visitors were more likely to feel their trip exceeded their expectations compared to repeat visitors from both U.S. East and U.S. West.
- **Age:** Among respondents from U.S. West and U.S. East, younger visitors felt more positively about their trip. Ratings declined incrementally eventually bottoming out among senior travelers.
- **Gender:** A larger percentage of female travelers from U.S. West and U.S. East felt positively about their trip in terms of their expectations compared to male visitors.
- **Income:** Among U.S. West visitors, less affluent travelers were more satisfied.
- **Travel agent:** Visitors from U.S. West who used a travel agent were more satisfied with their trip.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



P= Preliminary Data

SECTION 2 – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
TOTAL	95.1%	97.4%
On own (self guided)	82.3%	82.5%
Helicopter/ airplane	2.2%	7.1%
Boat/ submarine/ whale	26.4%	35.5%
Visit towns/communities	50.6%	54.6%
Limo/ van/ bus tour	6.3%	14.7%
Scenic views/ natural landmark	59.9%	69.6%
Movie/ TV/ film location	4.7%	6.9%

ACTIVITIES – RECREATION

	U.S. West	U.S. East
TOTAL	97.5%	97.3%
Beach/ sunbathing	85.2%	87.1%
Bodyboarding	9.9%	7.8%
Standup paddle board	6.3%	5.9%
Surfing	6.8%	6.3%
Canoeing/ kayak	6.8%	6.7%
Swim in the ocean	66.1%	67.9%
Snorkeling	47.2%	48.2%
Freediving	1.3%	1.4%
Windsurf/ Kitesurf	0.3%	0.1%
Jet ski/ Parasail	1.8%	2.0%
Scuba diving	2.5%	3.9%
Fishing	2.3%	2.8%
Golf	8.8%	6.5%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
TOTAL	97.5%	97.3%
Run/ Jog/ Fitness walk	32.3%	31.9%
Spa	9.3%	10.9%
Hiking	42.9%	53.5%
Backpack/ camp	0.7%	1.5%
Agritourism	12.4%	12.9%
Sport event/ tournament	1.1%	1.1%
Park/ botanical garden	31.5%	42.4%
Waterpark	0.7%	1.4%
Mountain tube/ waterfall rappel	1.8%	1.7%
Zip lining	4.5%	5.4%
Skydiving	0.4%	0.6%
All terrain vehicle (ATV)	5.0%	5.3%
Horseback riding	1.5%	1.9%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.2%	99.2%
Lunch/ sunset/ dinner/ evening cruise	21.1%	29.9%
Live music/ stage show	22.3%	32.1%
Nightclub/ dancing/ bar/ karaoke	7.2%	7.2%
Fine dining	56.4%	58.1%
Family restaurant	58.6%	55.6%
Fast food	33.8%	36.3%
Food truck	38.9%	42.1%
Café/ coffee house	45.9%	48.8%
Ethnic dining	24.9%	32.4%
Prepared own meal	51.6%	46.0%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East
TOTAL	97.7%	96.6%
Mall/ department store	40.5%	42.3%
Designer boutique	15.5%	19.4%
Hotel/ resort store	32.4%	38.9%
Swap meet/ flea market	15.8%	16.1%
Discount/ outlet store	12.4%	14.1%
Supermarket	69.5%	63.6%
Farmer's market	35.9%	30.3%
Convenience store	47.4%	51.6%
Duty free store	2.4%	3.8%
Local shop/ artisan	65.7%	67.7%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
TOTAL	66.3%	75.8%
Historic military site	16.5%	28.9%
Historic Hawaiian site	30.7%	35.4%
Other historical site	12.1%	14.2%
Art museums	2.0%	3.0%
Art gallery/ exhibition	10.8%	11.0%
Luau/ Polynesian show/ hula show	22.3%	37.9%
Lesson ex. ukulele, hula, canoe, lei making	3.2%	5.5%
Play/ concert/ theatre	1.4%	2.5%
Art/ craft fair	10.6%	8.5%
Festival event	2.8%	2.2%

ACTIVITIES – TRANSPORTATION

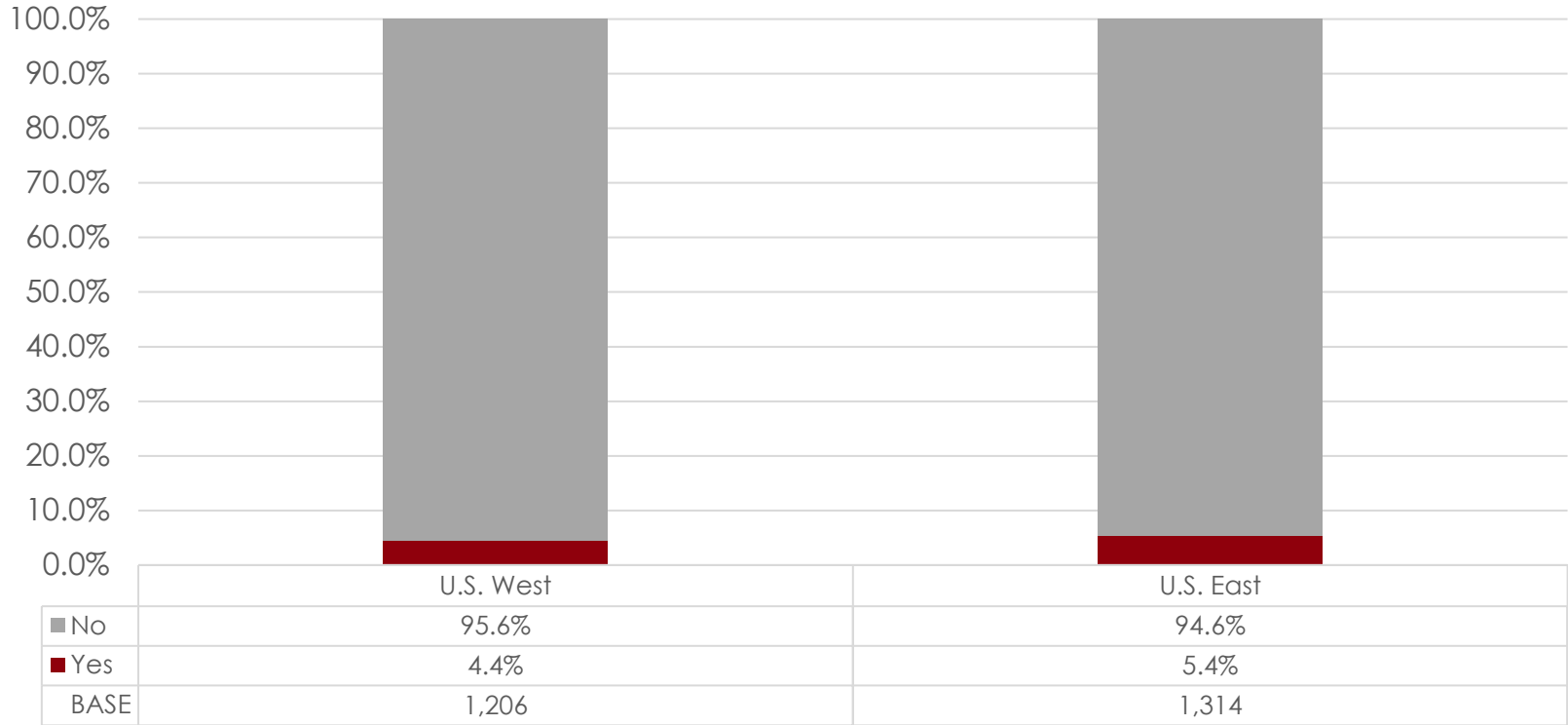
	U.S. West	U.S. East
TOTAL	92.3%	92.7%
Airport shuttle	13.8%	14.7%
Trolley	2.3%	2.8%
Public bus	3.6%	4.4%
Tour bus/ tour van	5.6%	15.0%
Taxi/ limo	9.1%	10.9%
Rental car	78.9%	75.0%
Ride share	15.7%	19.5%
Bicycle rental	2.2%	2.5%

ACTIVITIES – OTHER

	U.S. West	U.S. East
TOTAL	31.0%	27.2%
Visit friends/ family	30.2%	26.3%
Volunteer non profit	1.4%	1.4%

SECTION 3 – TRAVELERS WITH DISABILITIES

DISABILITY ASSISTANCE

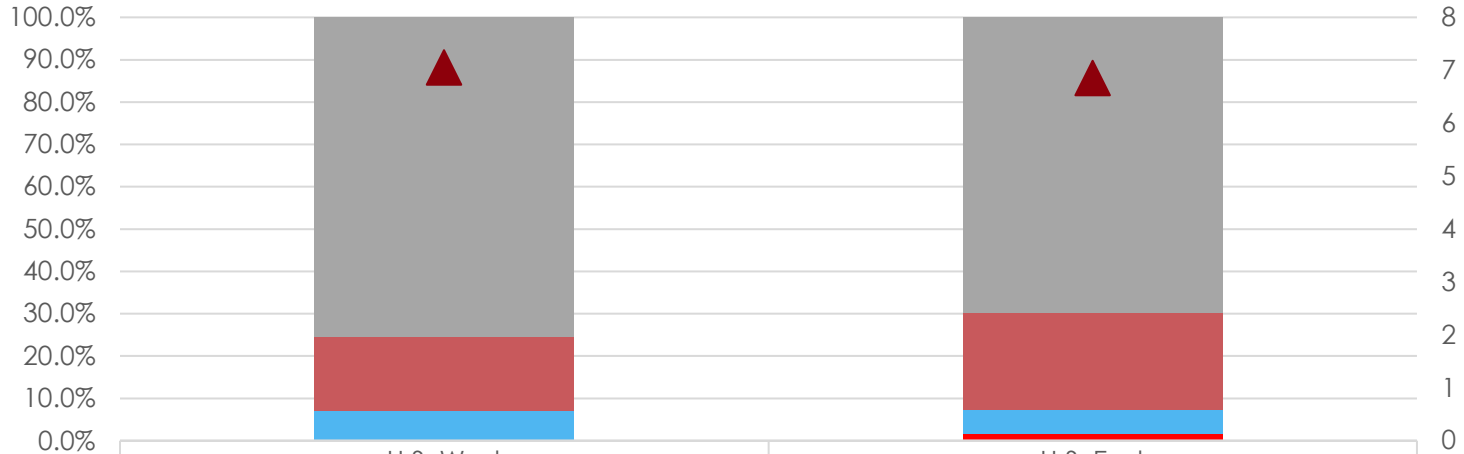


TYPES OF ASSISTANCE

	U.S. West	U.S. East
Mobility aid	67.8%	74.7%
Personal assistance	23.5%	15.6%
NA No one needed assistance	8.7%	2.8%
Other	3.5%	9.7%
Orientation and Mobility Assistance	3.5%	0.0%
Lift equipped van	3.5%	0.0%
ASL Interpreter/ texting/ captioning	1.7%	1.4%
Ambulance/ Hospital/ Medical visit	1.7%	0.0%
Print material in alternate format	0.0%	1.4%
BASE	56	71

OVERALL ACCESSIBILITY – AIRPORTS

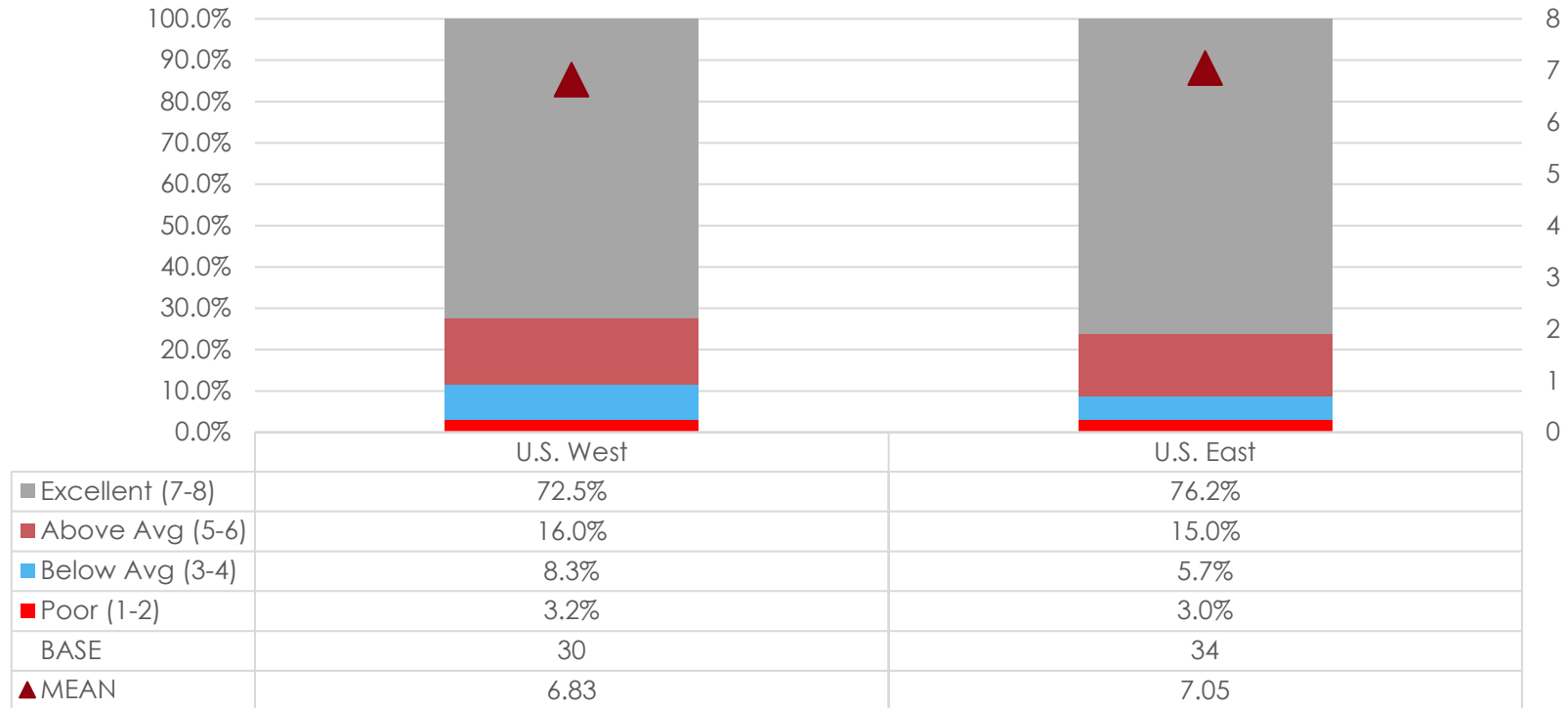
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	75.5%	69.9%
■ Above Avg (5-6)	17.3%	22.9%
■ Below Avg (3-4)	7.2%	5.7%
■ Poor (1-2)		1.5%
BASE	56	70
▲ MEAN	7.05	6.85

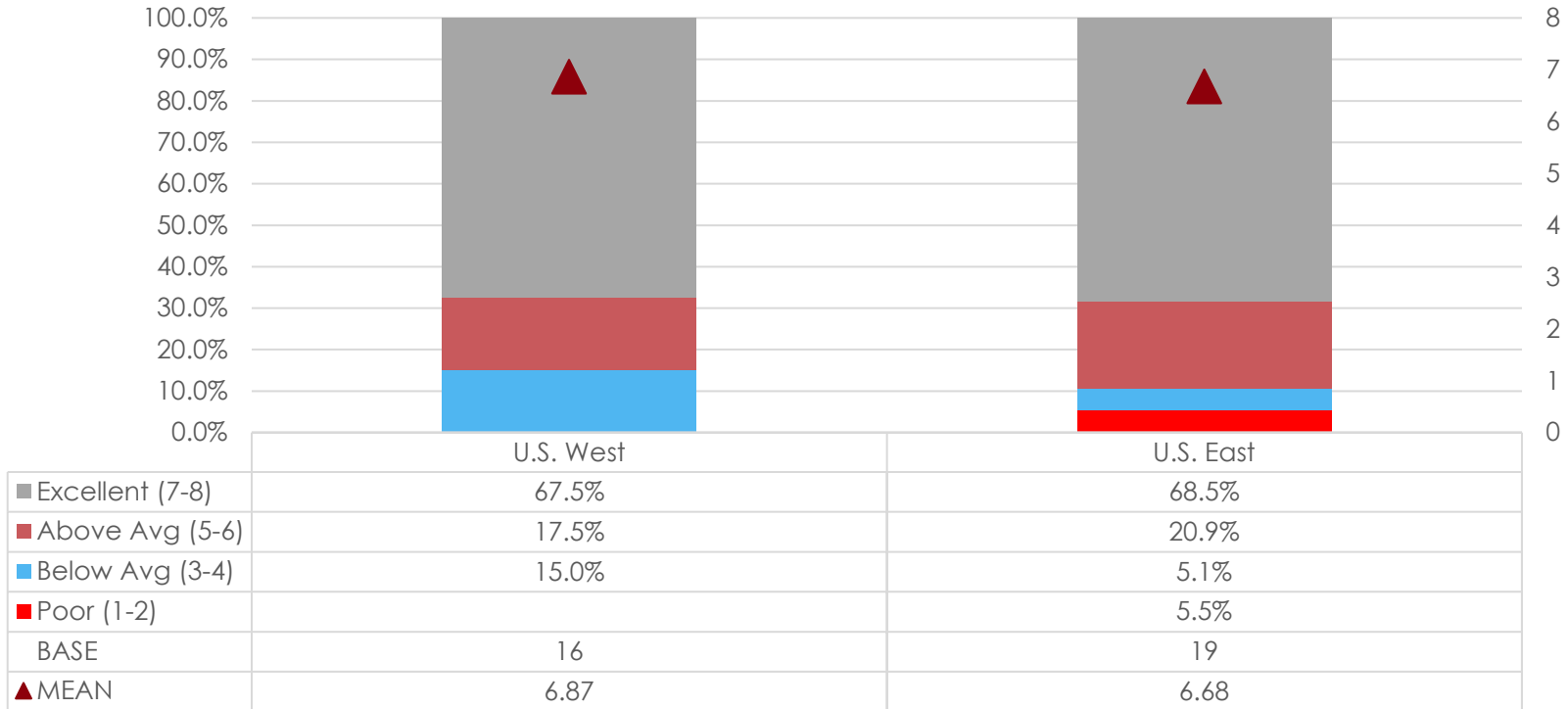
OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

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



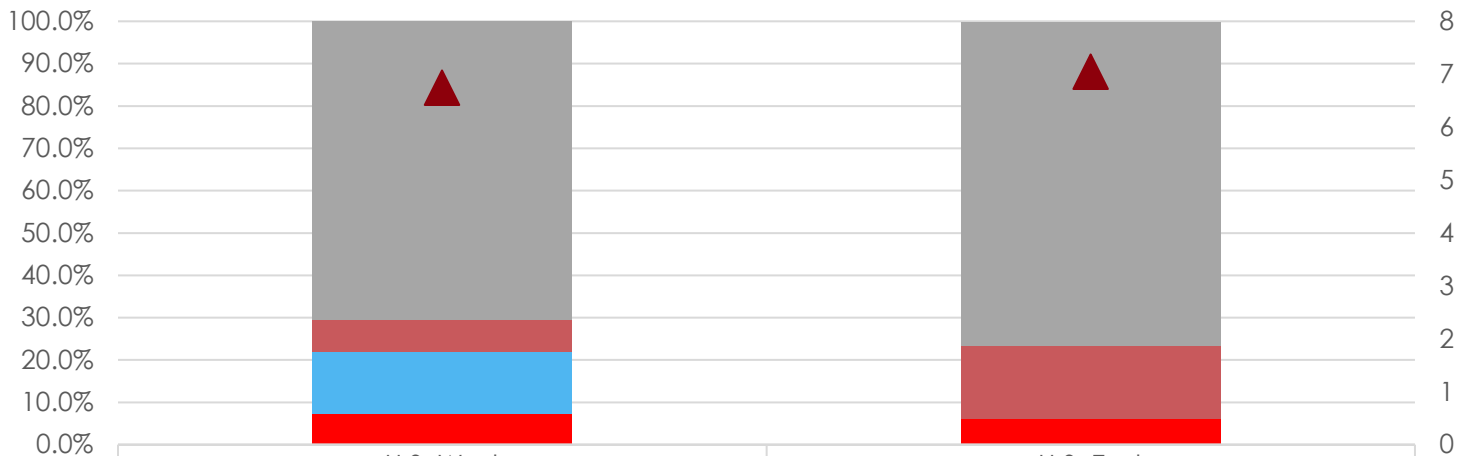
OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



OVERALL ACCESSIBILITY – RIDE SHARE

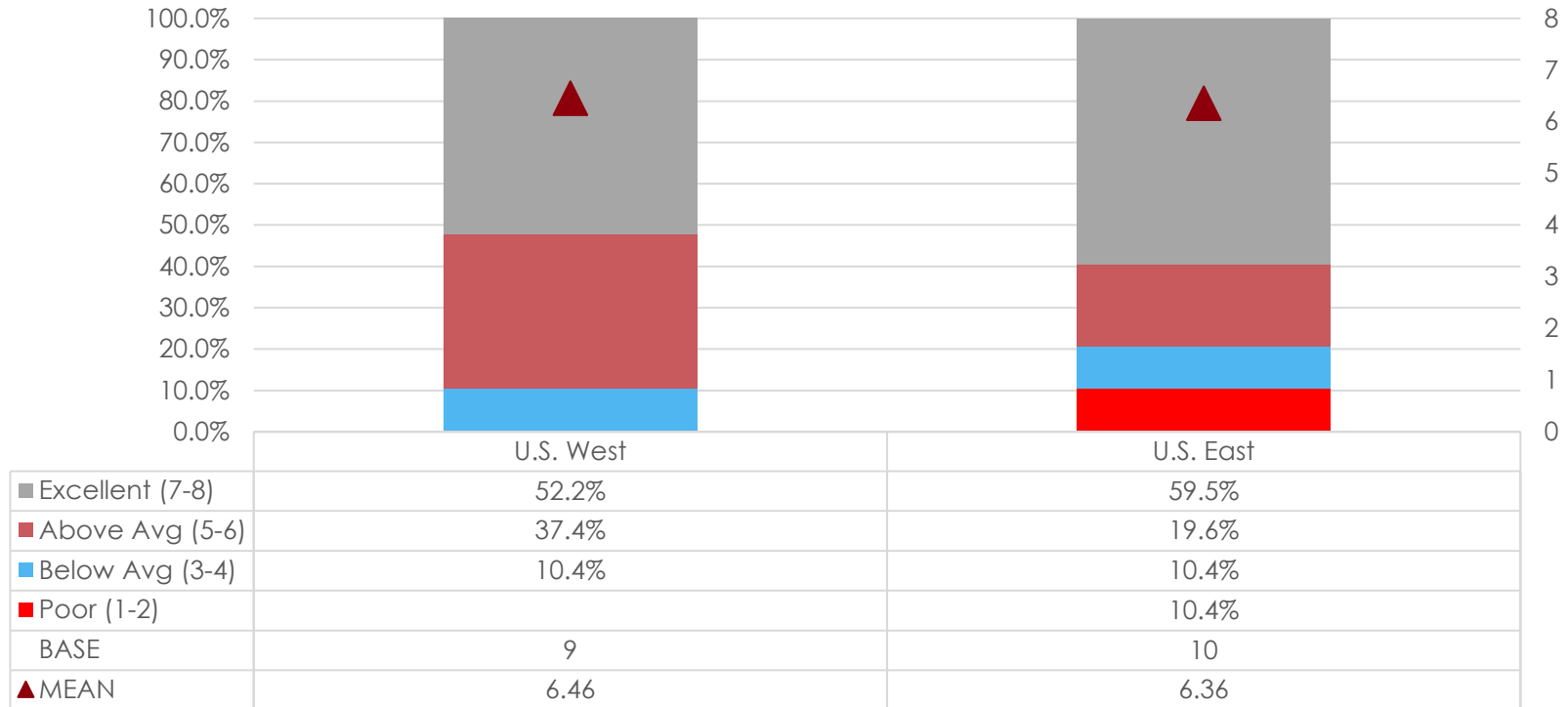
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	70.5%	76.5%
■ Above Avg (5-6)	7.4%	17.3%
■ Below Avg (3-4)	14.7%	
■ Poor (1-2)	7.4%	6.1%
BASE	13	17
▲ MEAN	6.75	7.05

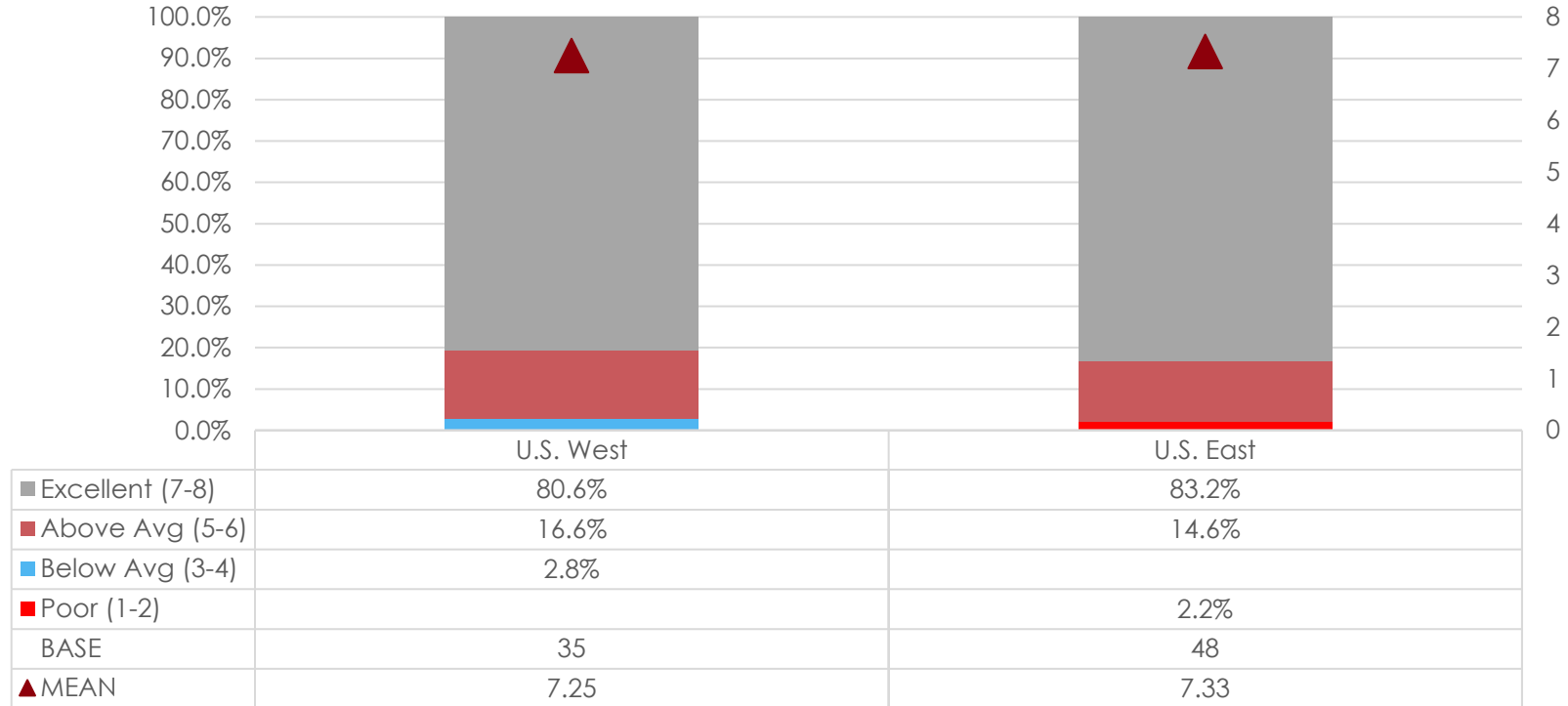
OVERALL ACCESSIBILITY – DEPT OF AGRICULTURE ANIMAL QUARANTINE

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



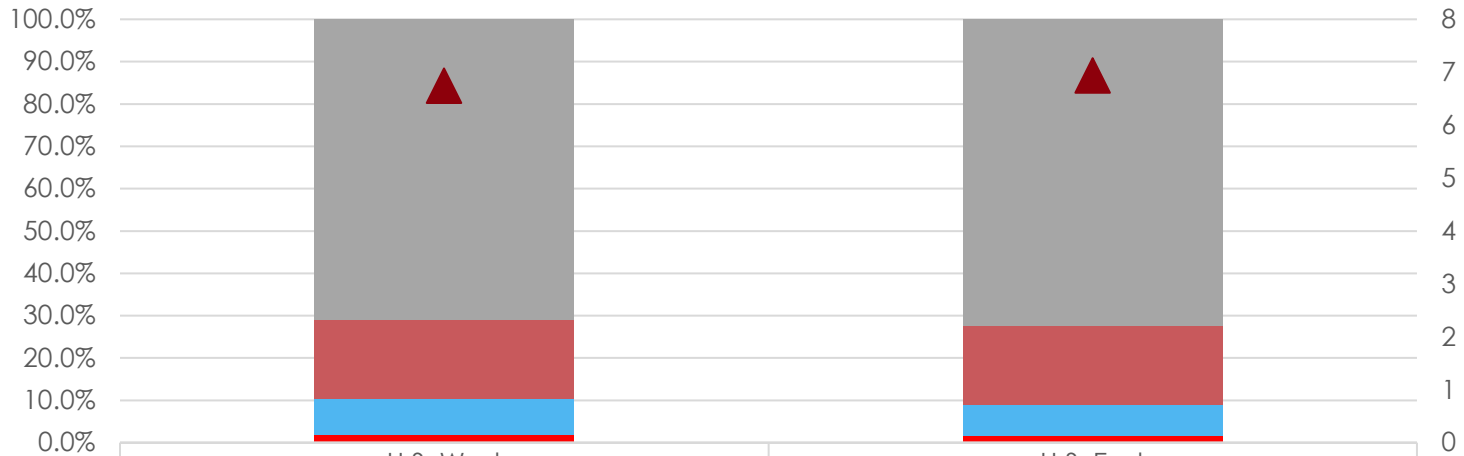
OVERALL ACCESSIBILITY – HOTELS

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



OVERALL ACCESSIBILITY – RESTAURANTS

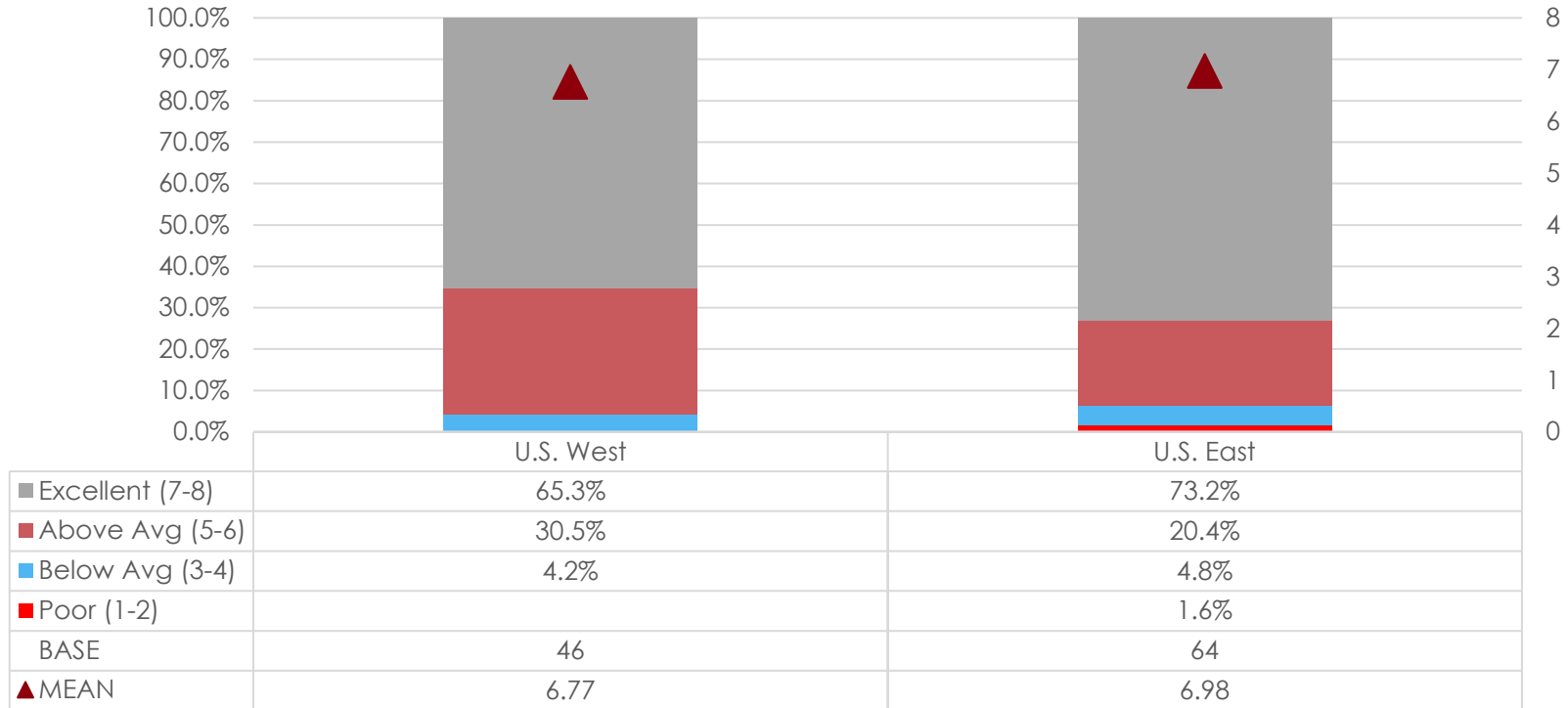
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	71.0%	72.5%
■ Above Avg (5-6)	18.6%	18.4%
■ Below Avg (3-4)	8.5%	7.5%
■ Poor (1-2)	1.9%	1.6%
BASE	52	66
▲ MEAN	6.75	6.94

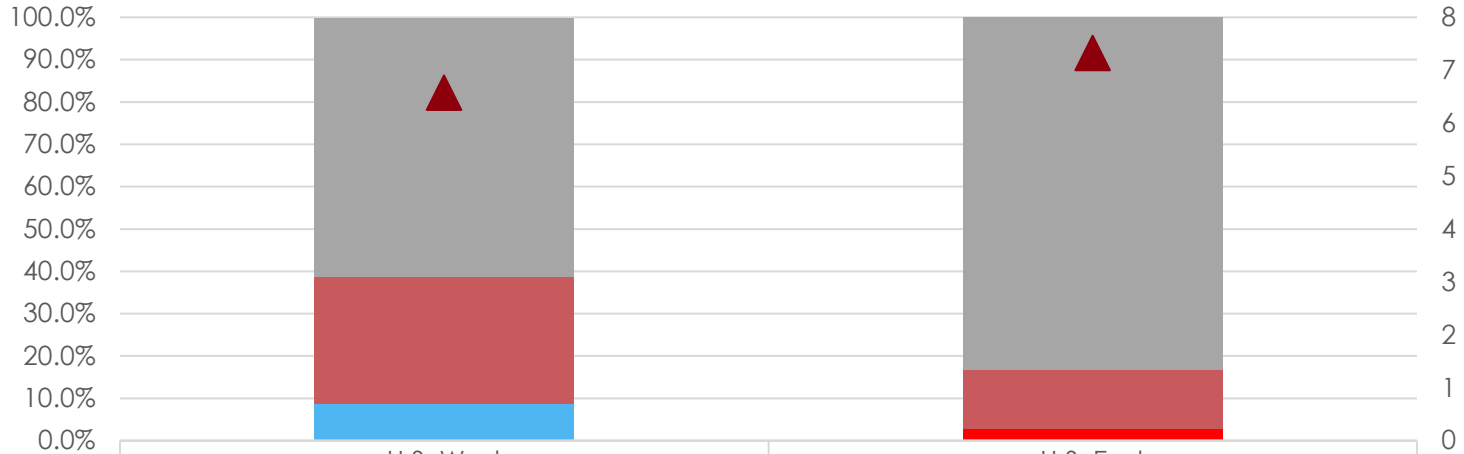
OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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



OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

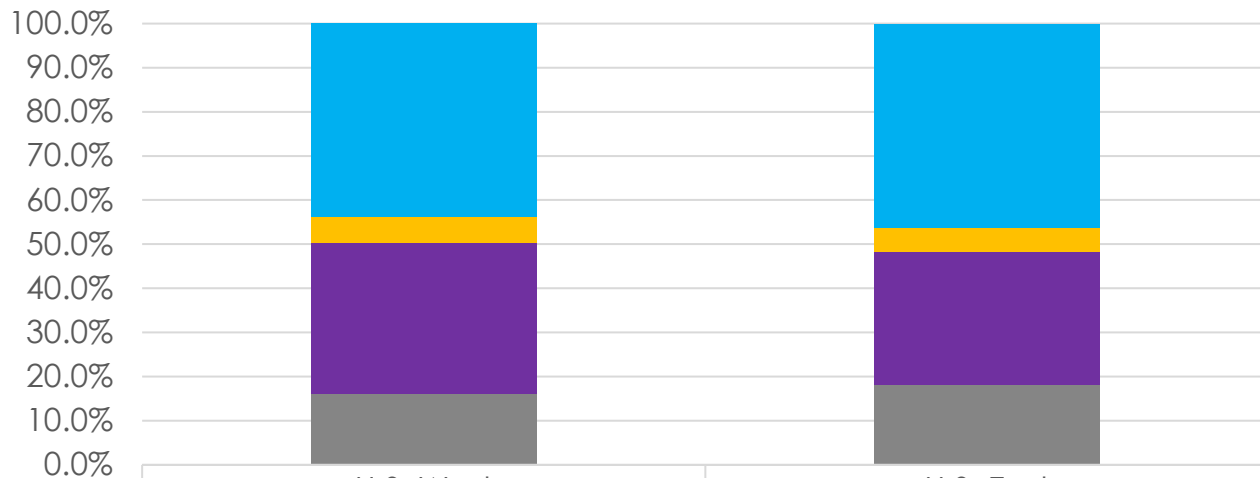
8-pt Rating Scale
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	61.1%	83.4%
■ Above Avg (5-6)	30.2%	13.7%
■ Below Avg (3-4)	8.6%	
■ Poor (1-2)		2.9%
BASE	22	36
▲ MEAN	6.58	7.33

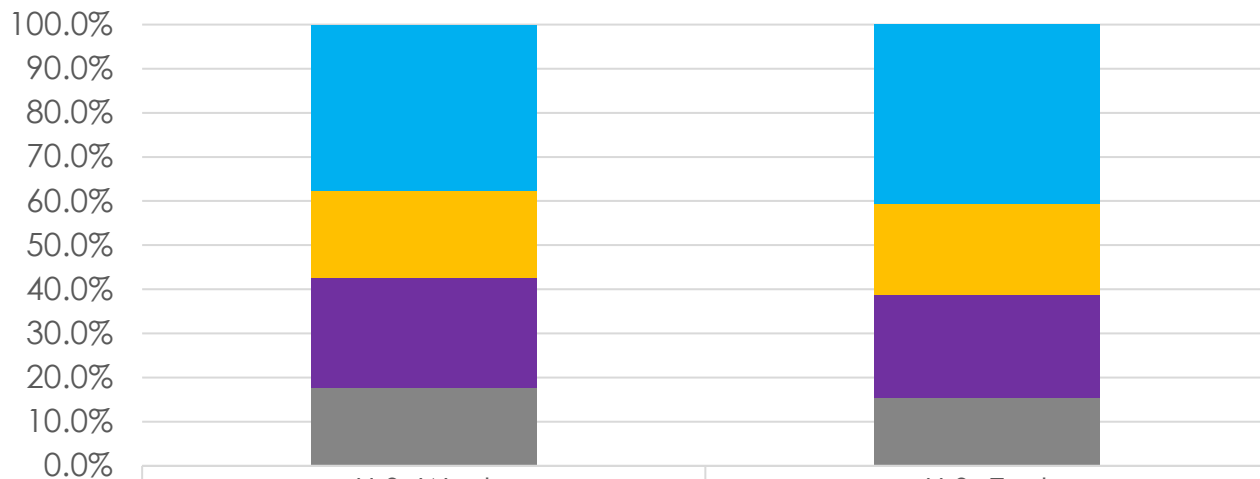
SECTION 4 – ALTERNATIVE MESSAGING

MESSAGING – “SAFE AND RESPONSIBLE TRAVEL”



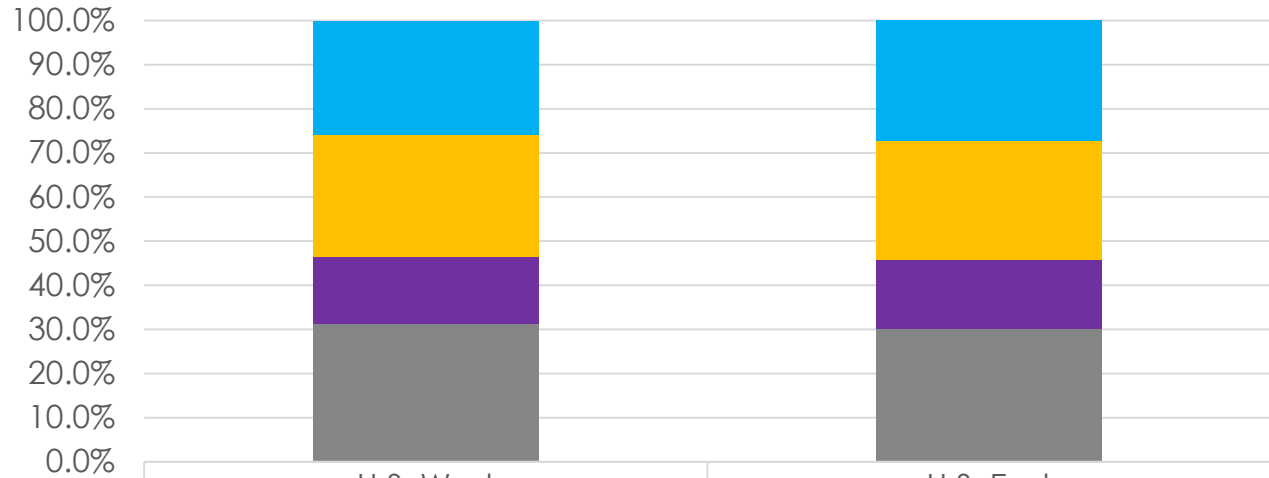
	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	43.9%	46.2%
■ YES- During trip	5.7%	5.6%
■ YES- Pre-arrival	34.2%	30.0%
■ NO	16.2%	18.2%
BASE	1206	1314

MESSAGING – “CARING FOR AND RESPECTING HAWAI‘I’S CULTURE, PEOPLE, AND ENVIRONMENT”



	U.S. West	U.S. East
YES- Pre-arrival/ During trip	37.5%	40.6%
YES- During trip	19.8%	20.6%
YES- Pre-arrival	25.0%	23.4%
NO	17.6%	15.4%
BASE	1206	1314

MESSAGING – “OCEAN AND HIKING SAFETY”

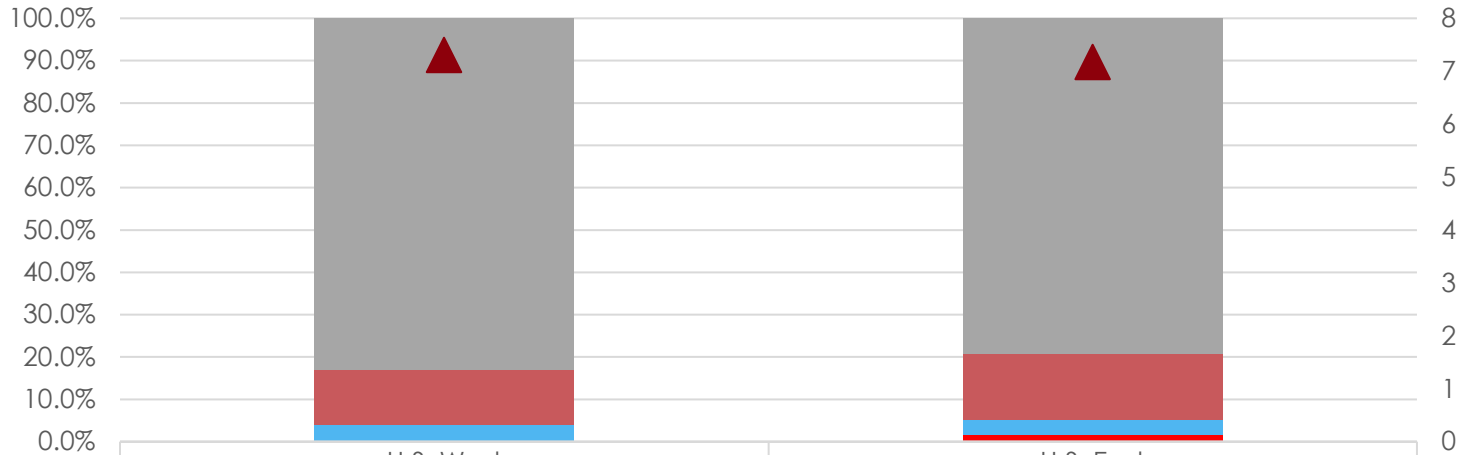


	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	25.8%	27.3%
■ YES- During trip	27.7%	27.1%
■ YES- Pre-arrival	15.2%	15.5%
■ NO	31.3%	30.2%
BASE	1206	1314

SECTION 5 – O'AHU

SATISFACTION – O‘AHU

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



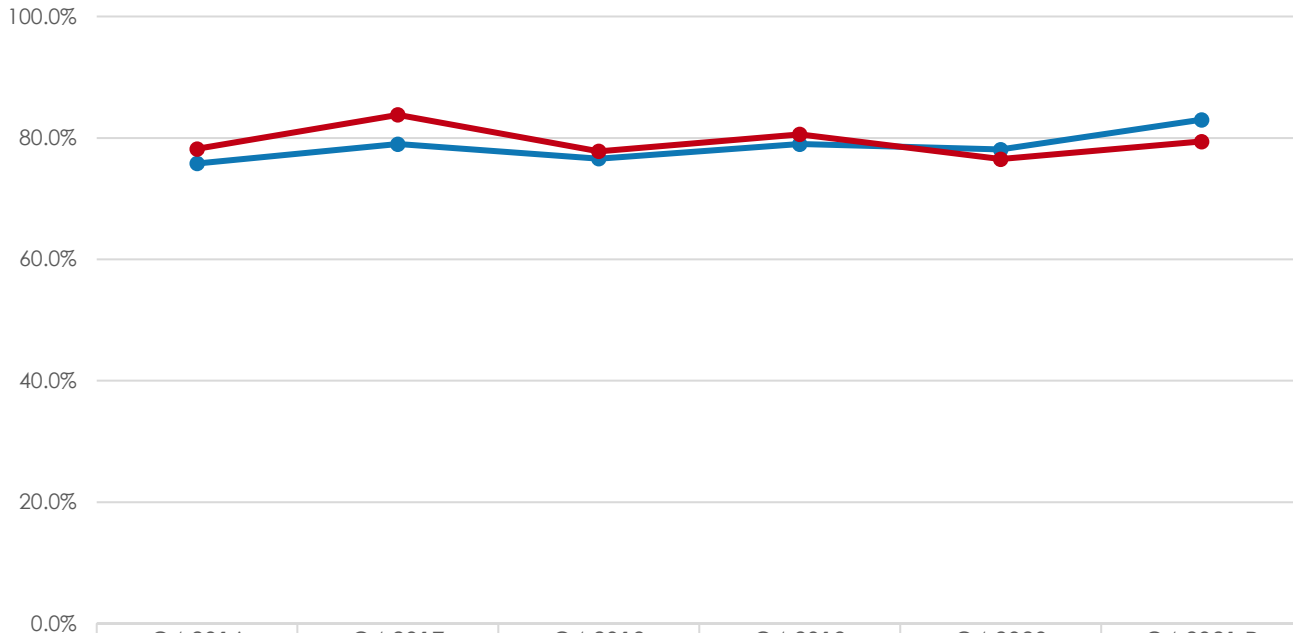
	U.S. West	U.S. East
■ Excellent (7-8)	83.0%	79.4%
■ Above Avg (5-6)	13.1%	15.5%
■ Below Avg (3-4)	3.5%	3.6%
■ Poor (1-2)	0.4%	1.6%
BASE	469	694
▲ MEAN	7.31	7.18

SATISFACTION – O‘AHU

- **Trips to Hawai‘i:** U.S. West and U.S. East visitors who were first-time visitors to the state gave higher satisfaction scores compared to repeat visitors.
- **Age:** Amongst travelers from U.S. West, satisfaction was highest amongst younger (<35) travelers and seniors (65+).
- **Gender:** Female visitors from both U.S. West were more satisfied with their stay on O‘ahu than males from this visitor market.
- **Household income:** Travelers from U.S. West who were in the bottom income tier were the most satisfied with their stay.
- **O‘ahu Only Visitors:** Visitors from U.S. West and U.S. East whose trip consisted of visiting just O‘ahu were more satisfied with their stay on island, compared to those who also visited at least one Neighbor Island.

SATISFACTION – O‘AHU

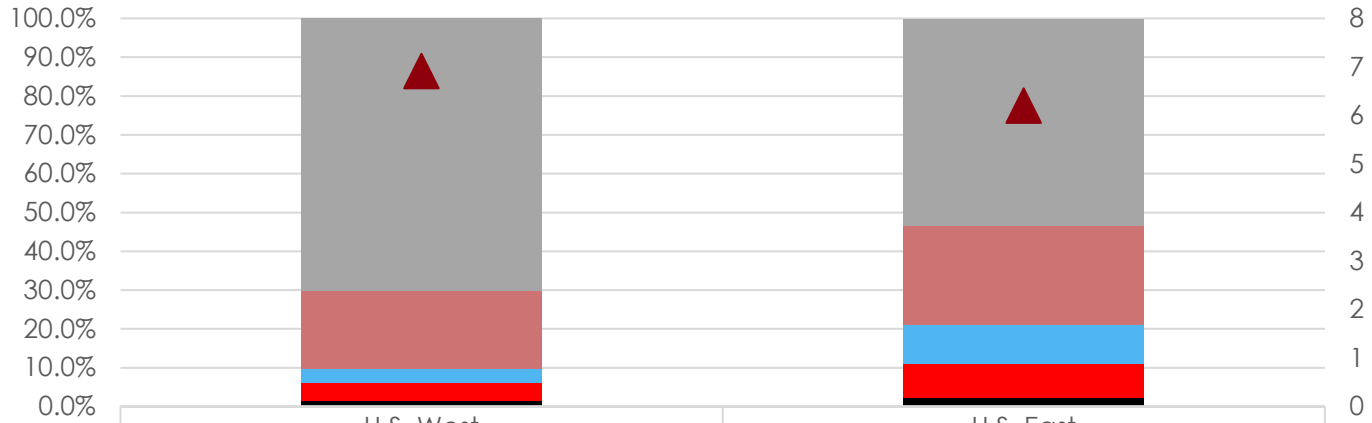
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

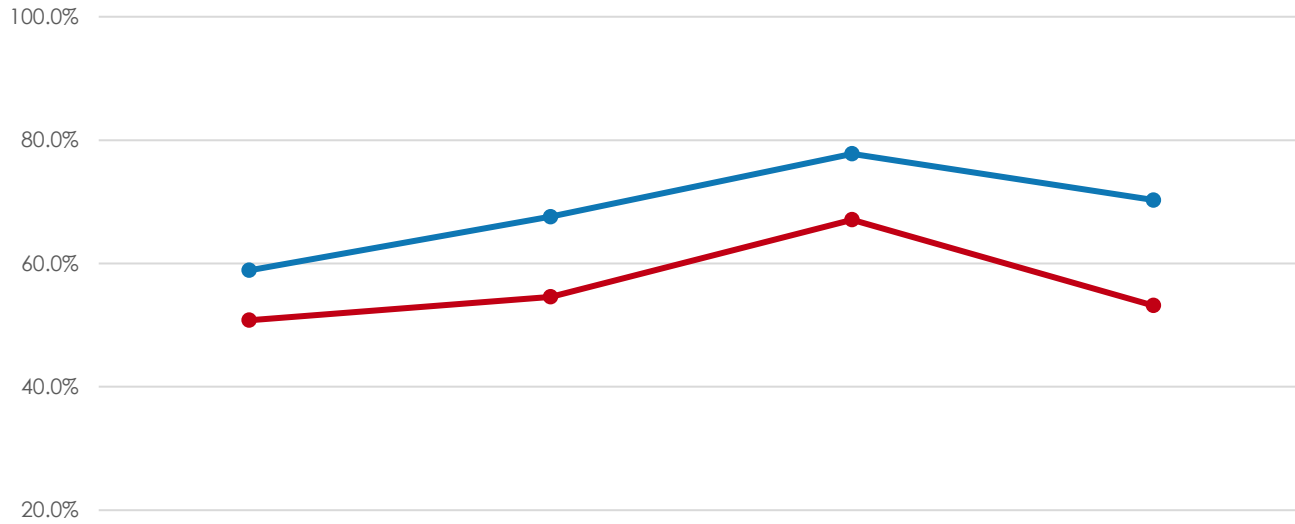
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	70.3%	53.2%
Somewhat likely (5-6)	20.1%	25.6%
Somewhat unlikely (3-4)	3.6%	10.1%
Very unlikely (1-2)	4.7%	8.8%
Not sure	1.4%	2.2%
BASE	434	590
▲ MEAN	6.91	6.20

LIKELIHOOD OF RETURN VISIT – O‘AHU

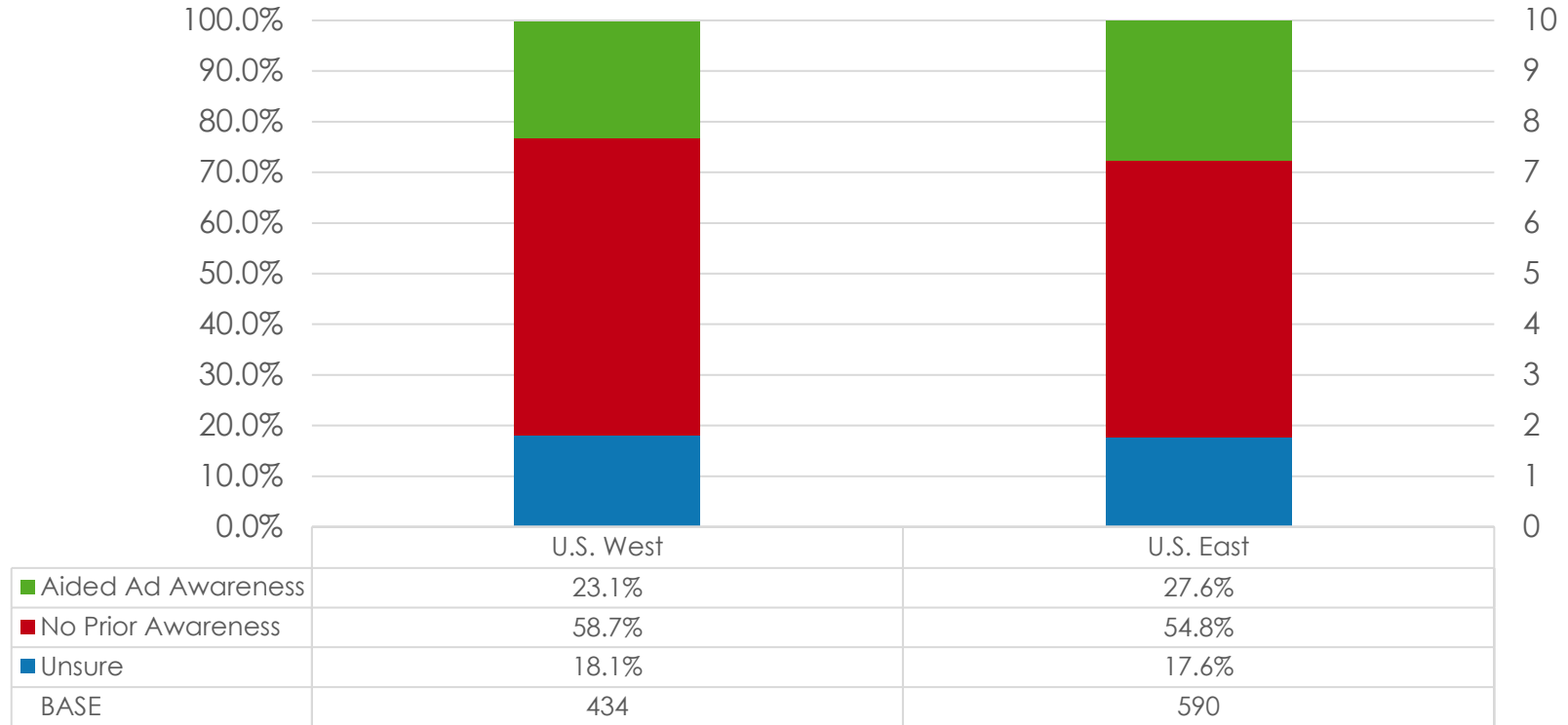
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021 P
U.S. West	58.9%	67.6%	77.8%	70.3%
U.S. East	50.8%	54.6%	67.1%	53.2%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
Atlantis Submarine & Cruises	2.0%	4.3%
Bernice P. Bishop Museum	4.3%	4.2%
Byodo In Temple	11.0%	11.9%
Chinatown & Honolulu Art District	12.2%	12.6%
Diamond Head State Monument	26.6%	36.5%
Dole Plantation	29.4%	34.4%
Haleiwa	22.4%	24.7%
Hanauma Bay Nature Reserve	13.9%	13.1%
Harold L. Lyon Arboretum	1.2%	1.4%
Hawai‘i State Art Museum	1.0%	0.4%
Honolulu Museum of Art	1.8%	2.4%
Hawaiian Mission Houses, Historic Site and Archive	1.3%	1.5%
Hawai‘i’s Plantation Village	2.0%	1.9%
Honolulu Zoo	7.0%	6.8%

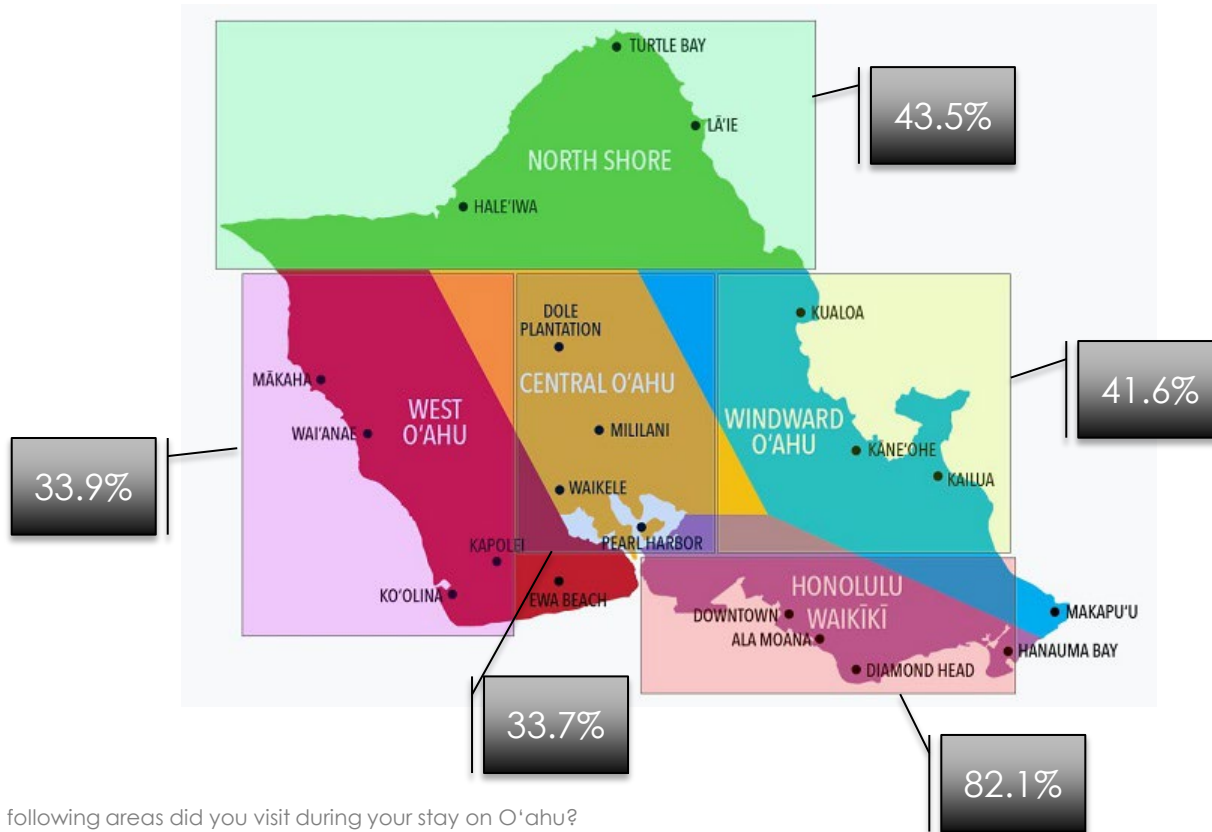
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
Ho‘omaluhia Botanical Garden	8.1%	9.5%
Iolani Palace State Monument	4.3%	6.7%
Kaiwi State Scenic Shoreline/ Makapu‘u Trail	3.7%	9.1%
Kakaako Street Art	3.2%	2.2%
Koko Head Crater Trail	5.0%	9.2%
Kualoa Private Nature Reserve	15.5%	15.4%
Lanikai or Kailua Beach	25.2%	28.5%
Manoa Falls & Trail	11.5%	12.0%
National Memorial Cemetery of the Pacific	8.8%	13.5%
Nuuanu Pali Lookout	12.4%	13.3%
North Shore Beaches	46.6%	50.7%

ATTRACTIONS – O‘AHU (cont.)

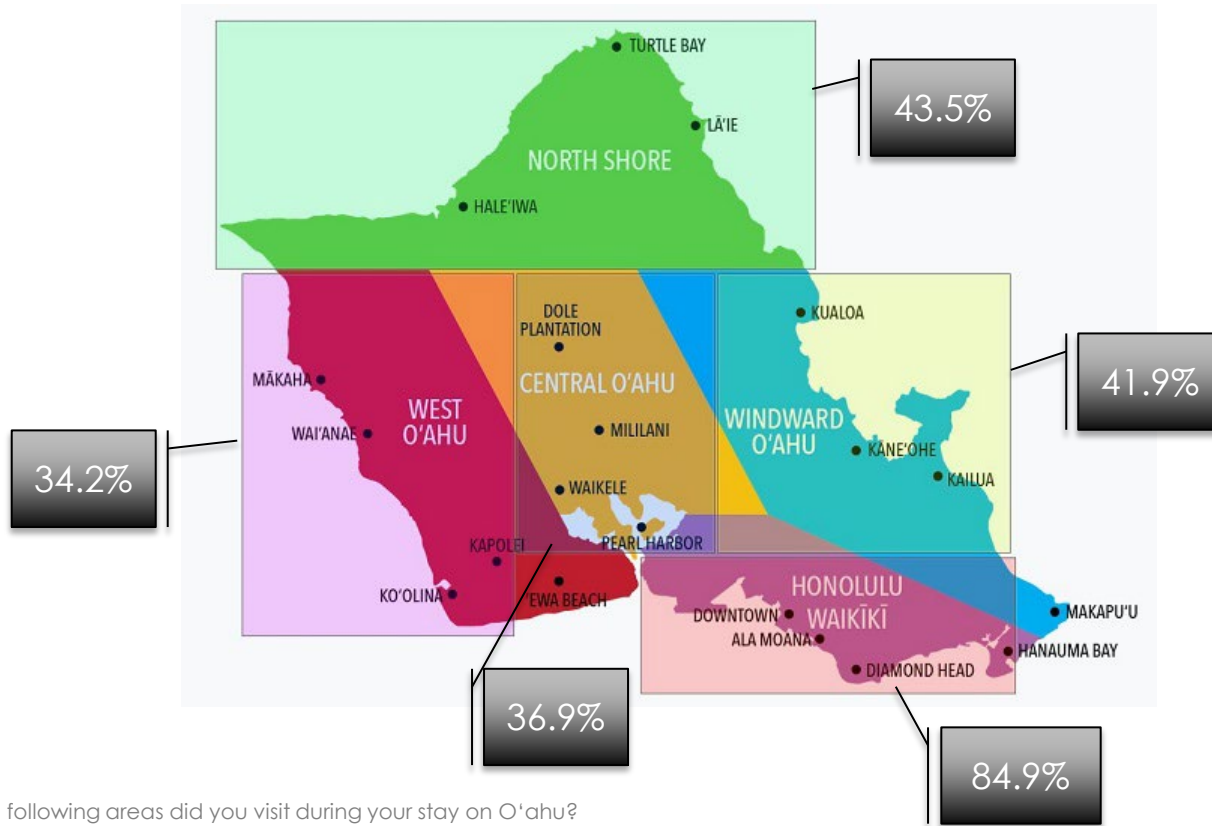
	U.S. West	U.S. East
Pearl Harbor	32.5%	50.9%
Polynesian Cultural Center	13.8%	12.8%
Queen Emma’s Summer Palace	0.4%	2.1%
Sea Life Park Hawai‘i	3.7%	3.8%
Waikiki Aquarium	4.2%	3.1%
Waimanalo Beach Park	10.1%	13.0%
Waimea Valley	19.9%	21.1%

AREAS VISITED U.S. WEST



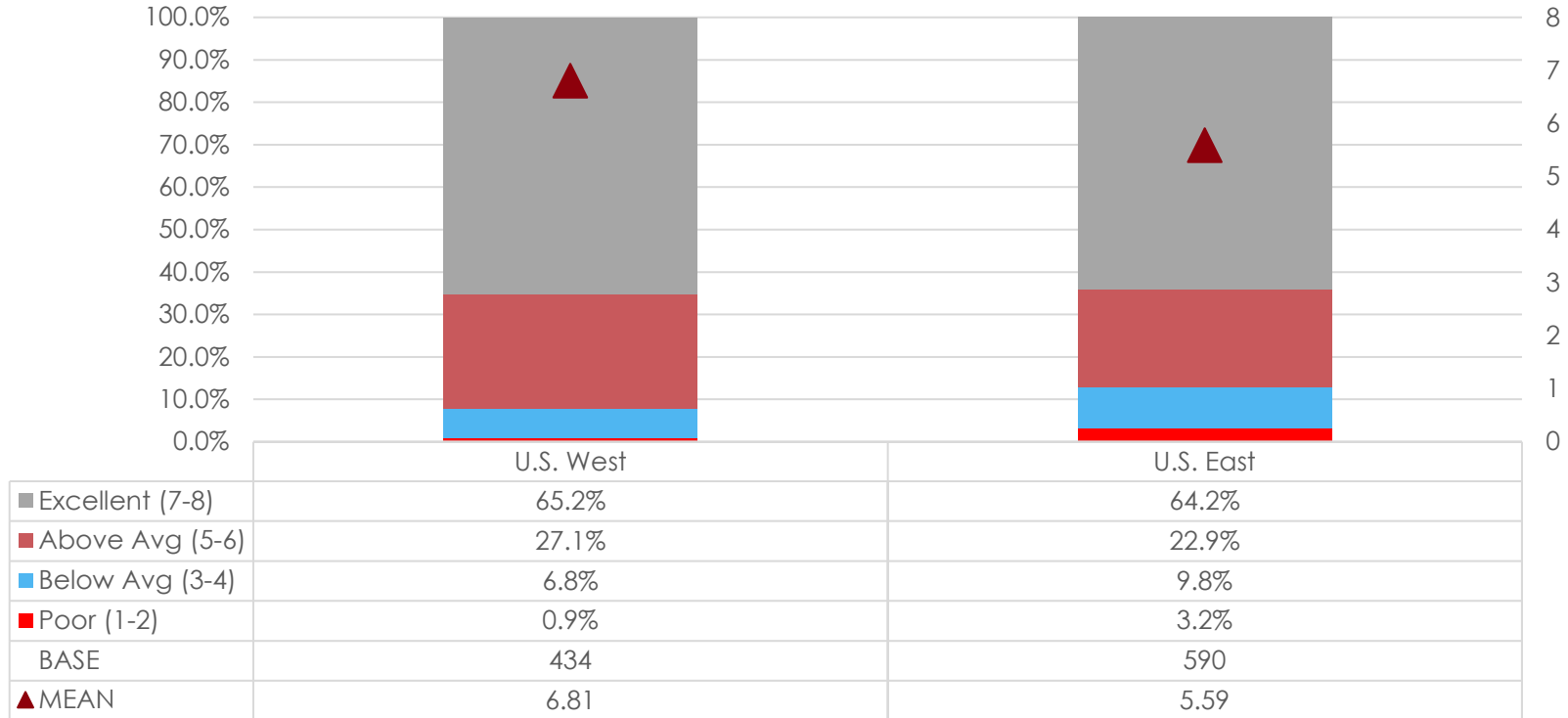
59 Q. Which of the following areas did you visit during your stay on O'ahu?

AREAS VISITED U.S. EAST

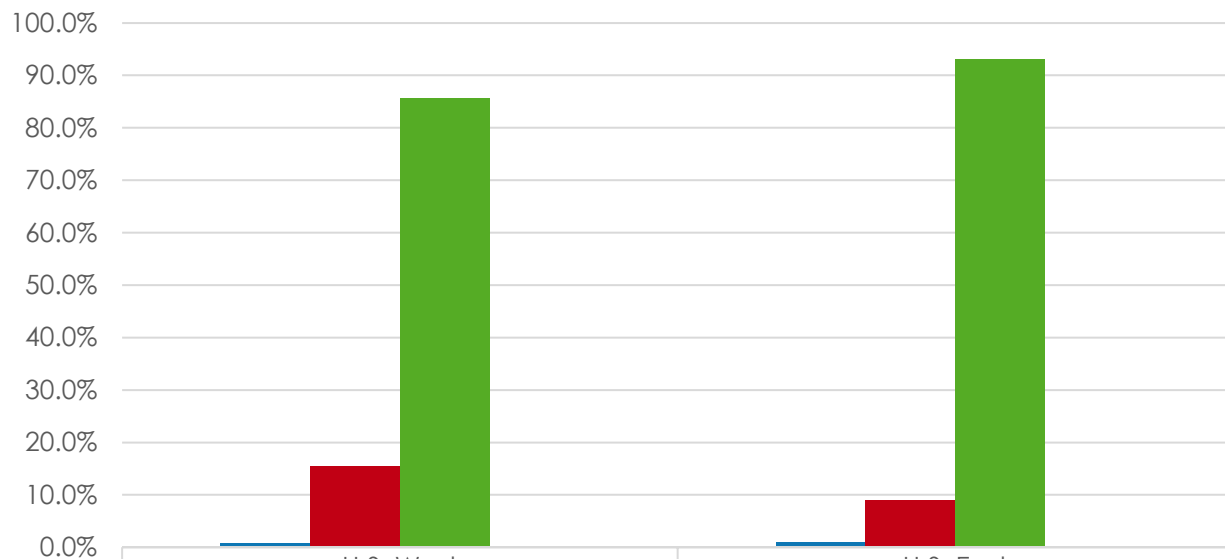


SATISFACTION – Daniel K. Inouye International Airport

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



SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ Neither of these	0.7%	1.0%
■ Full-face snorkel mask	15.4%	8.9%
■ 2-Piece, separate mask & snorkel	85.7%	93.1%
BASE	130	201

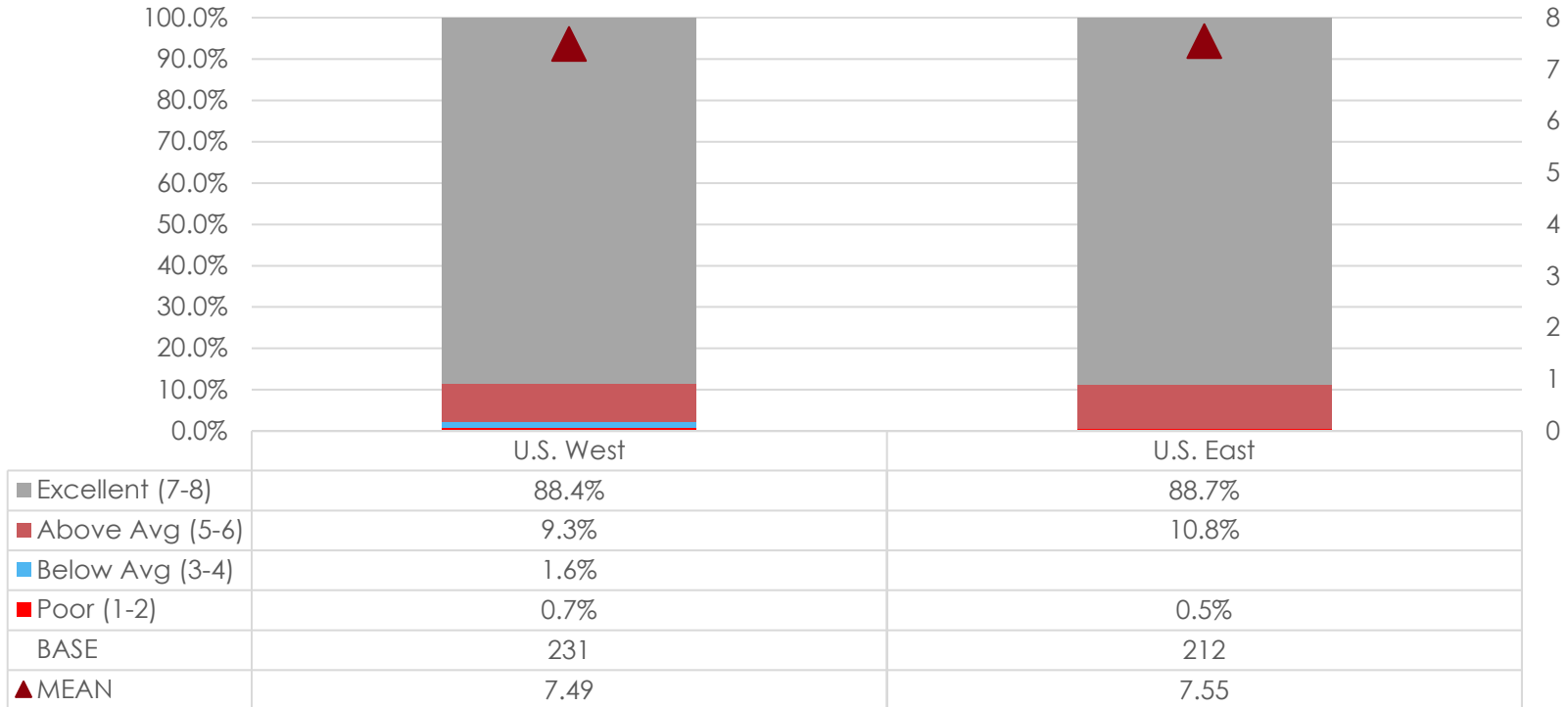
SNORKELING OCEAN SAFETY – O‘AHU

	U.S. West	U.S. East
Did not have to be assisted or rescued	96.8%	98.4%
Yes, needed assistance using 2 piece mask & snorkel	2.1%	1.6%
Yes, while snorkeling using a full face mask	1.1%	-%
BASE	129	199

SECTION 6 – KAUA‘I

SATISFACTION – KAUA‘I

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

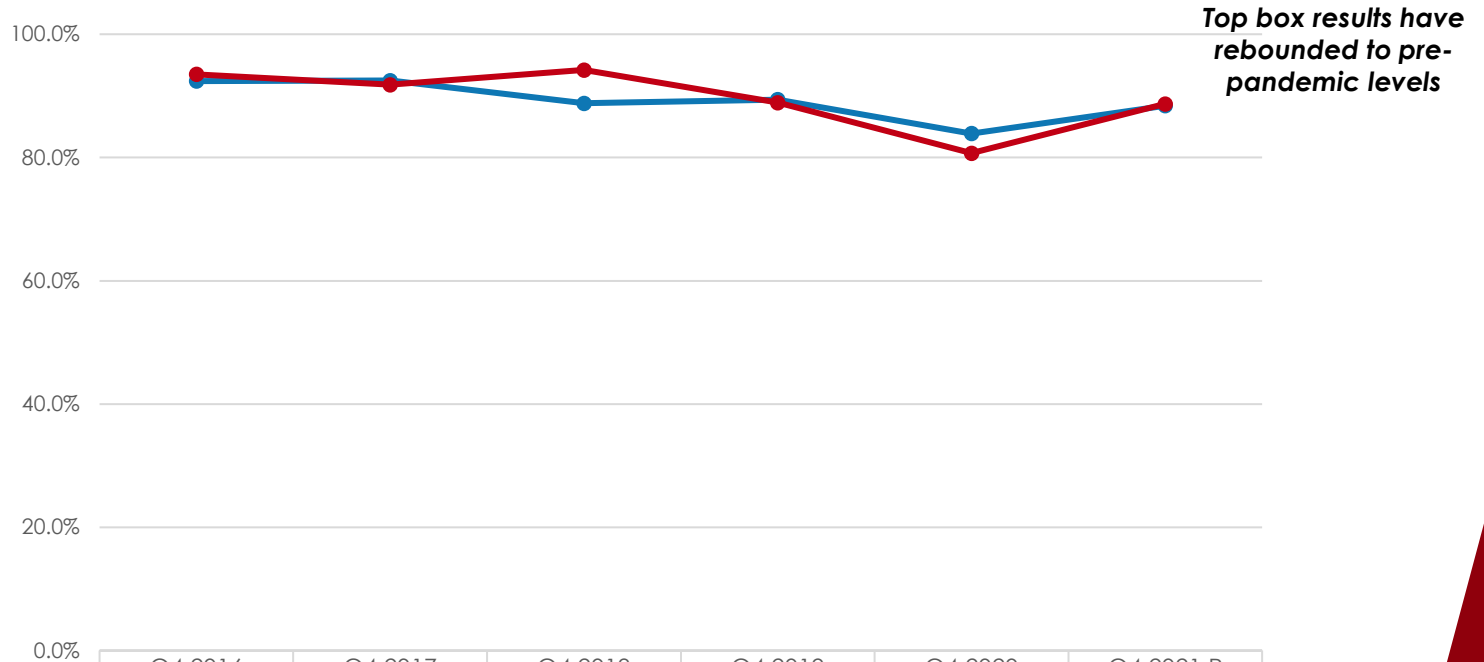


SATISFACTION – KAUA‘I

- **Education:** Visitors from U.S. West with a college degree were more satisfied with their stay compared to those without a college degree from this visitor market.

SATISFACTION – KAUA‘I

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

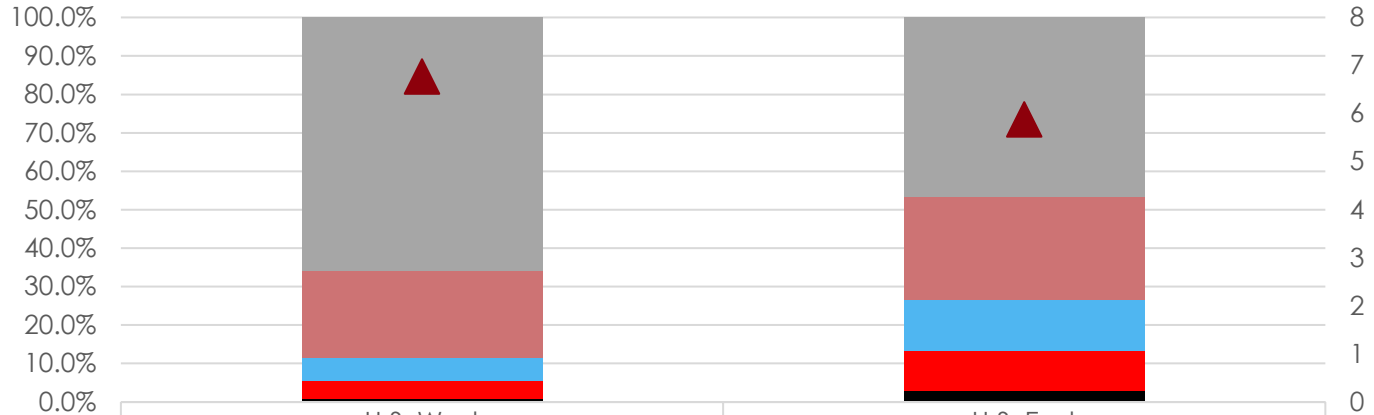


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021 P
U.S. West	92.4%	92.5%	88.8%	89.4%	83.9%	88.4%
U.S. East	93.5%	91.8%	94.2%	88.9%	80.7%	88.7%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – KAUA‘I

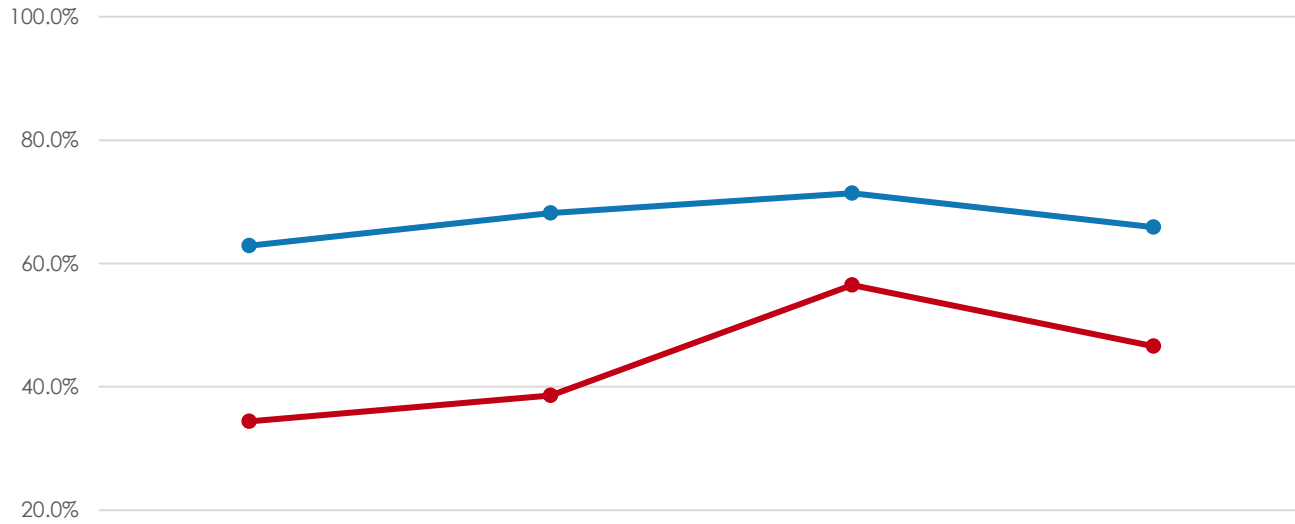
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	65.9%	46.6%
■ Somewhat likely (5-6)	22.5%	26.8%
■ Somewhat unlikely (3-4)	6.2%	13.3%
■ Very unlikely (1-2)	4.6%	10.4%
■ Not sure	0.8%	2.9%
BASE	231	211
▲ MEAN	6.77	5.88

LIKELIHOOD OF RETURN VISIT – KAUA‘I

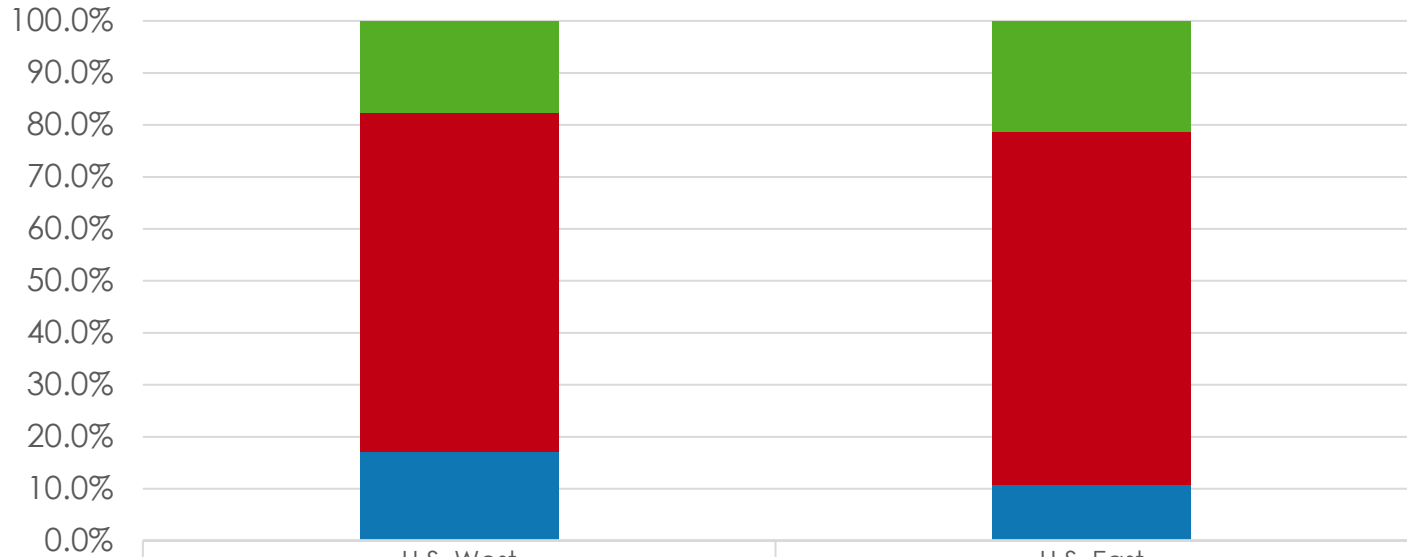
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021 P
U.S. West	62.9%	68.2%	71.4%	65.9%
U.S. East	34.4%	38.6%	56.5%	46.6%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East
Aided Ad Awareness	17.6%	21.2%
No Prior Awareness	65.4%	68.0%
Unsure	17.0%	10.8%
BASE	231	211

ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
Fern Grotto	8.1%	7.1%
Hanalei Town	58.3%	56.2%
Hanalei Beach	57.3%	51.0%
Kalapaki Beach	19.3%	28.7%
Kalalau Trail	16.6%	19.6%
Bike Path in Kapaa	8.9%	10.4%
Kaua‘i Museum	1.2%	5.3%
Ke‘e Beach	15.0%	12.3%
Kilauea Lighthouse	28.0%	31.8%
Koke‘e	12.1%	16.3%

ATTRACTIONS – KAUA‘I (cont.)

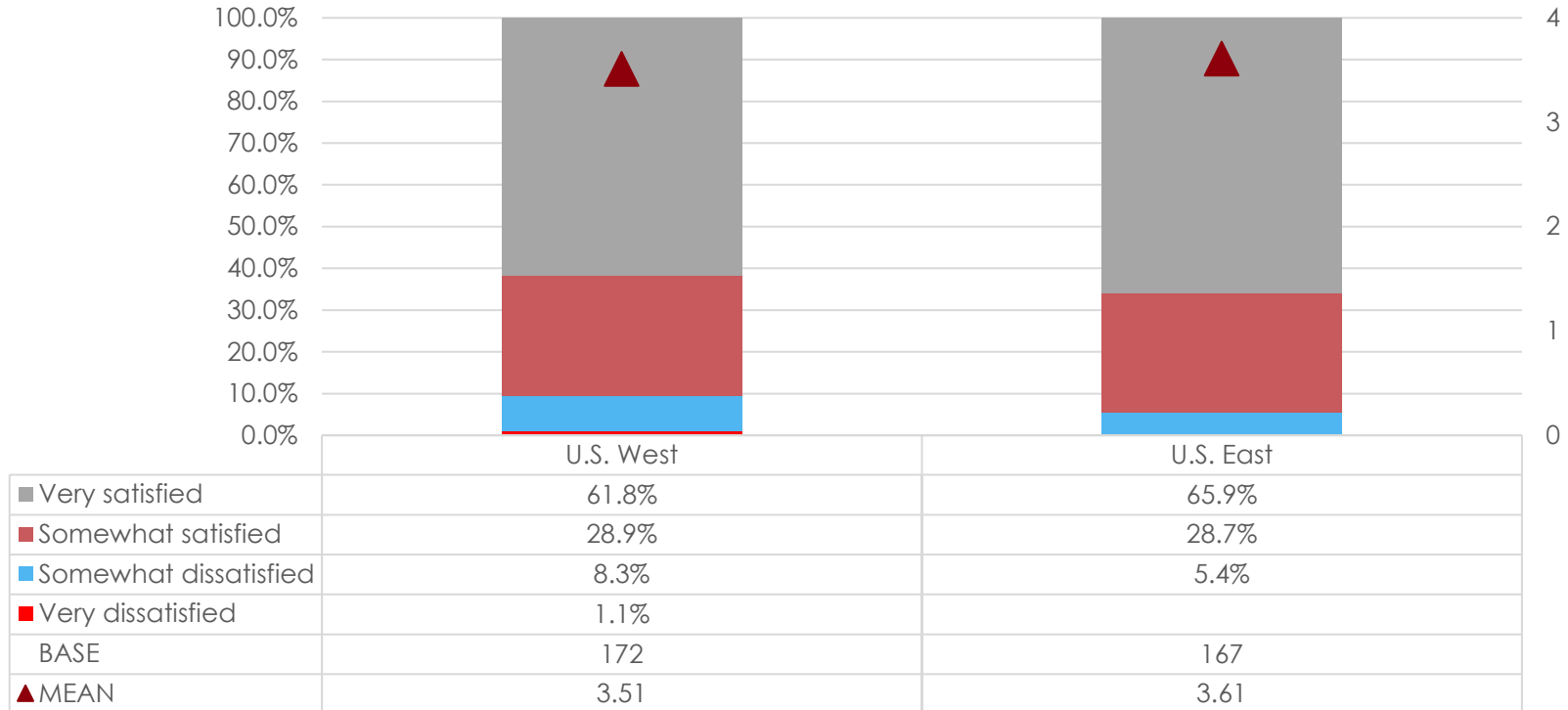
	U.S. West	U.S. East
Koke'e Museum	5.9%	5.7%
Na Aina Kai Gardens	1.6%	3.8%
Napali Coast	41.2%	57.3%
Allerton Garden	5.6%	6.6%
Limahuli Garden	6.7%	10.0%
Old Koloa Town	44.9%	35.6%
Opaeka'a Falls	17.6%	28.5%
Po'ipu Beach	74.7%	63.2%
Smith's Tropical Paradise Gardens	6.9%	8.2%
Spouting Horn	43.5%	31.3%
Wailua Falls	33.0%	43.9%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	20.3%	24.4%
Waimea Canyon	52.3%	58.2%
Disc Golf	0.4%	0.0%
Mini Golf	1.2%	1.5%

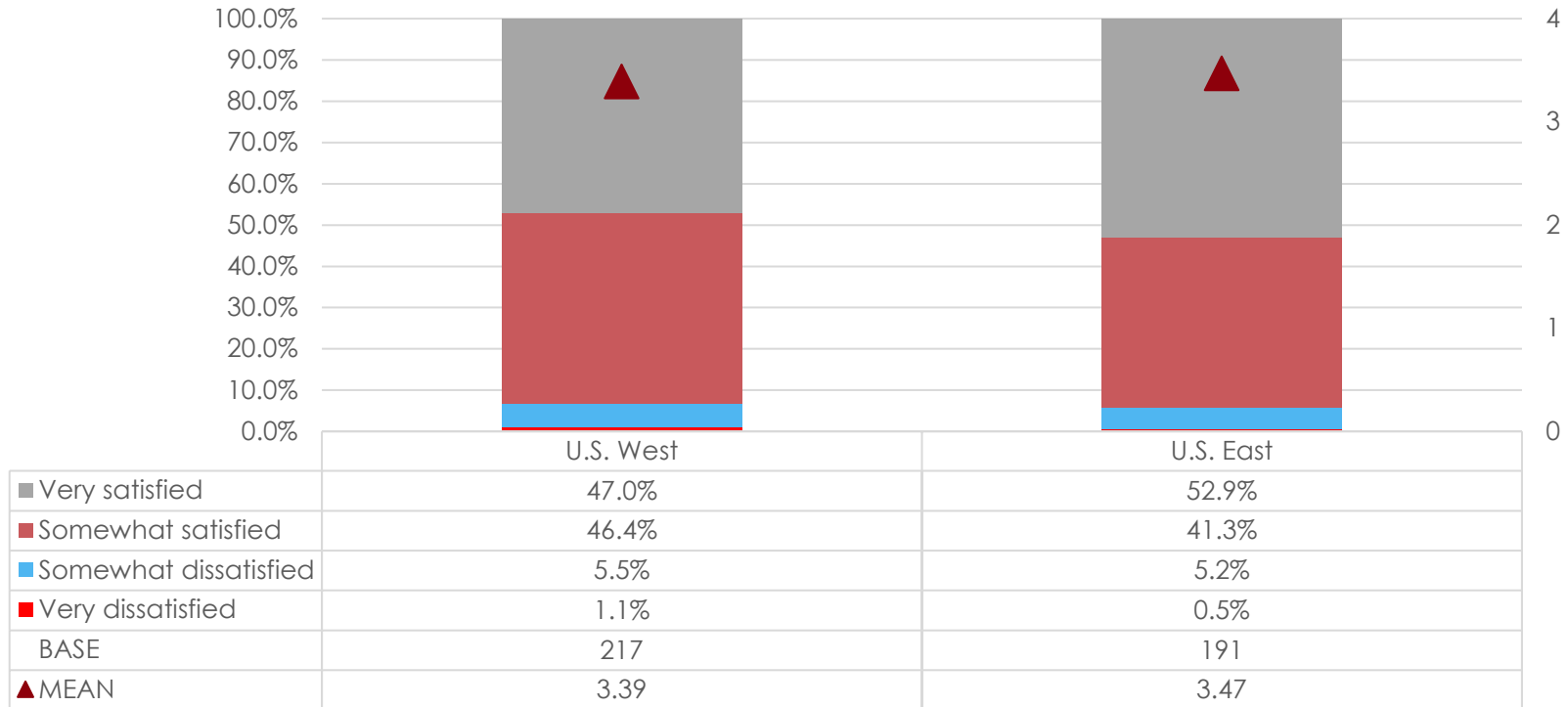
SATISFACTION – ENTERTAINMENT

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



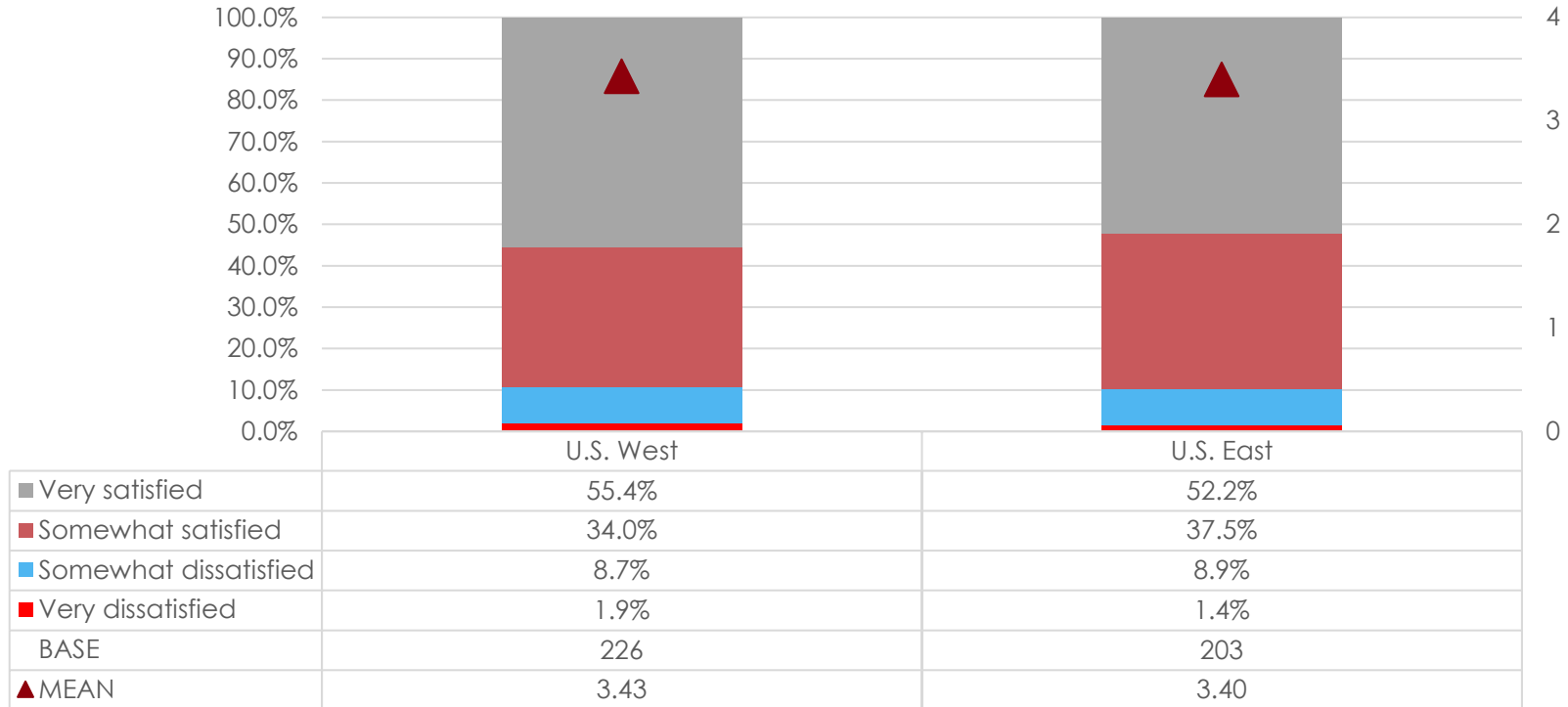
SATISFACTION – SHOPPING

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



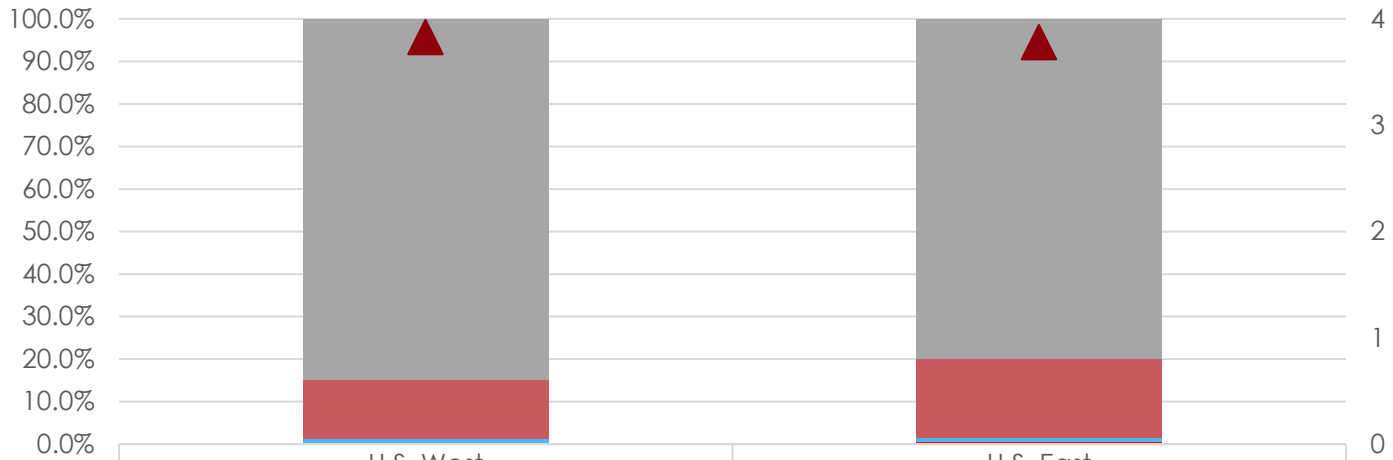
SATISFACTION – DINING

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



SATISFACTION – BEACHES

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

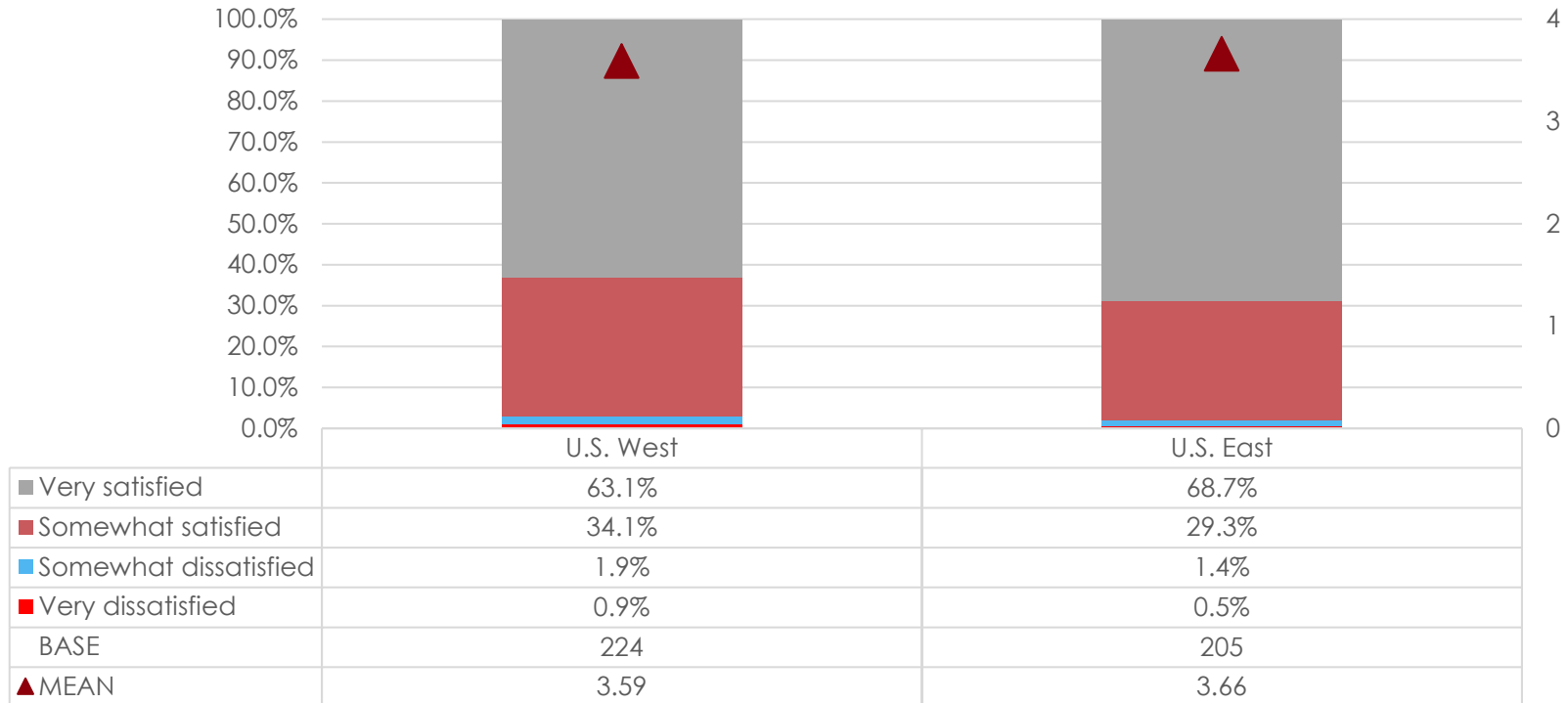


	U.S. West	U.S. East
■ Very satisfied	84.7%	80.0%
■ Somewhat satisfied	14.1%	18.6%
■ Somewhat dissatisfied	0.8%	1.0%
■ Very dissatisfied	0.4%	0.5%
BASE	227	204
▲ MEAN	3.83	3.78



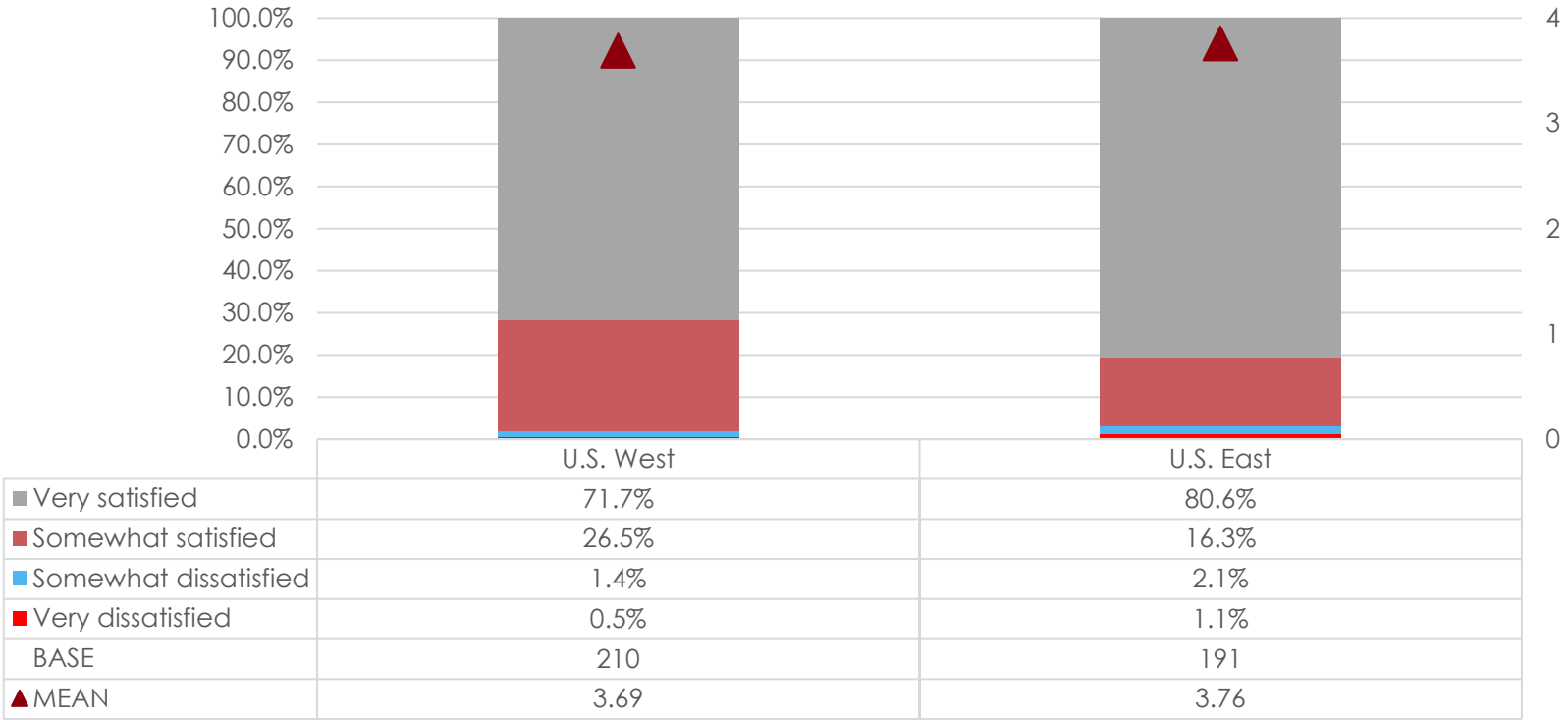
SATISFACTION – PUBLIC AREAS

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



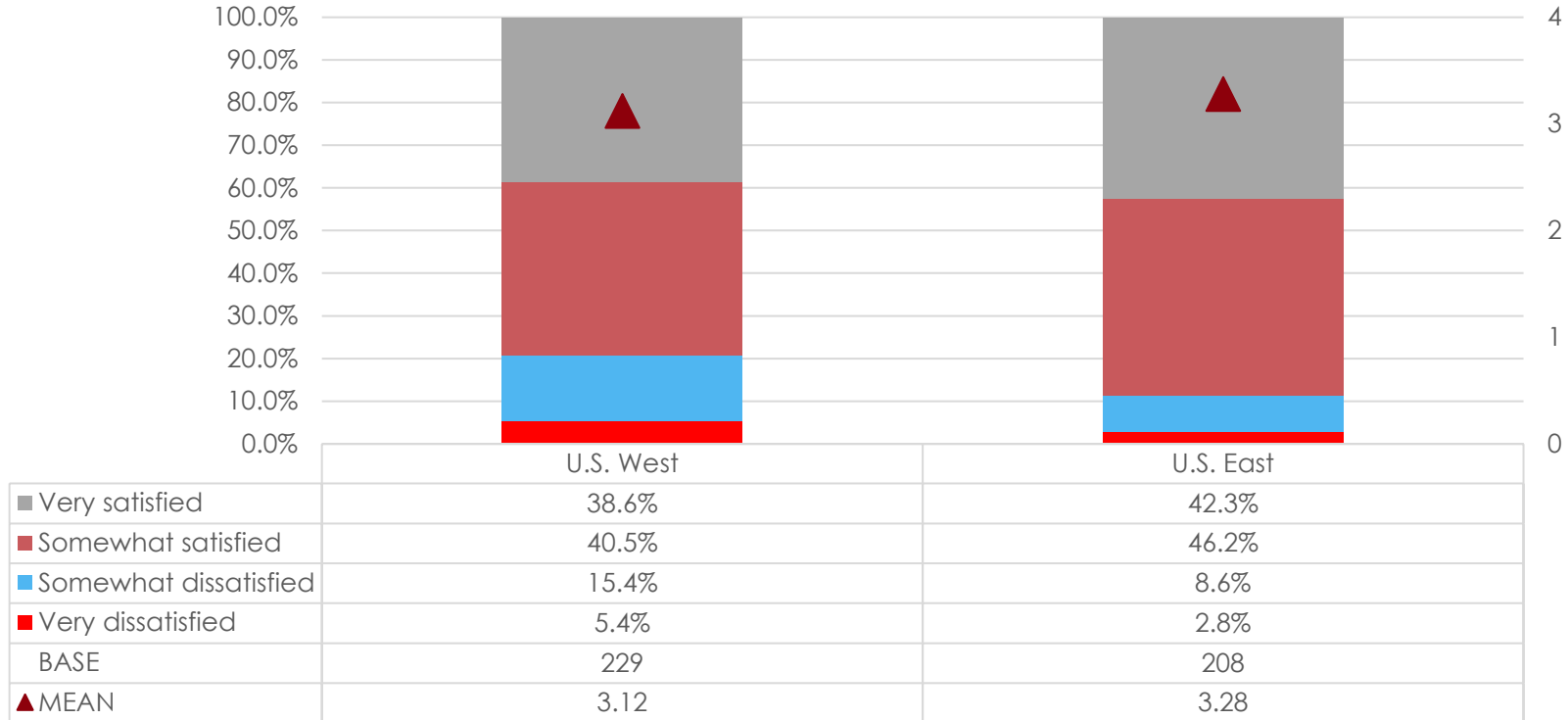
SATISFACTION – PARKS

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



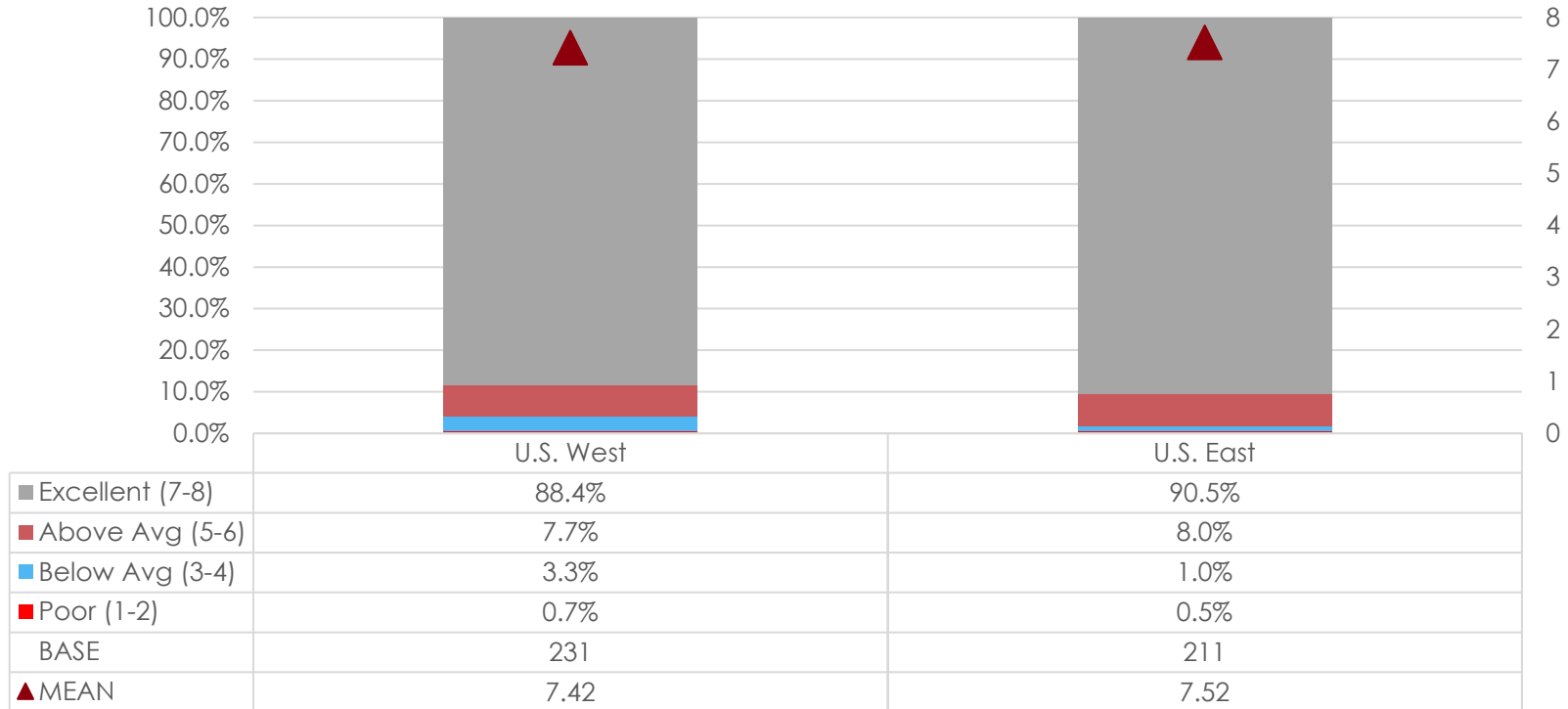
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

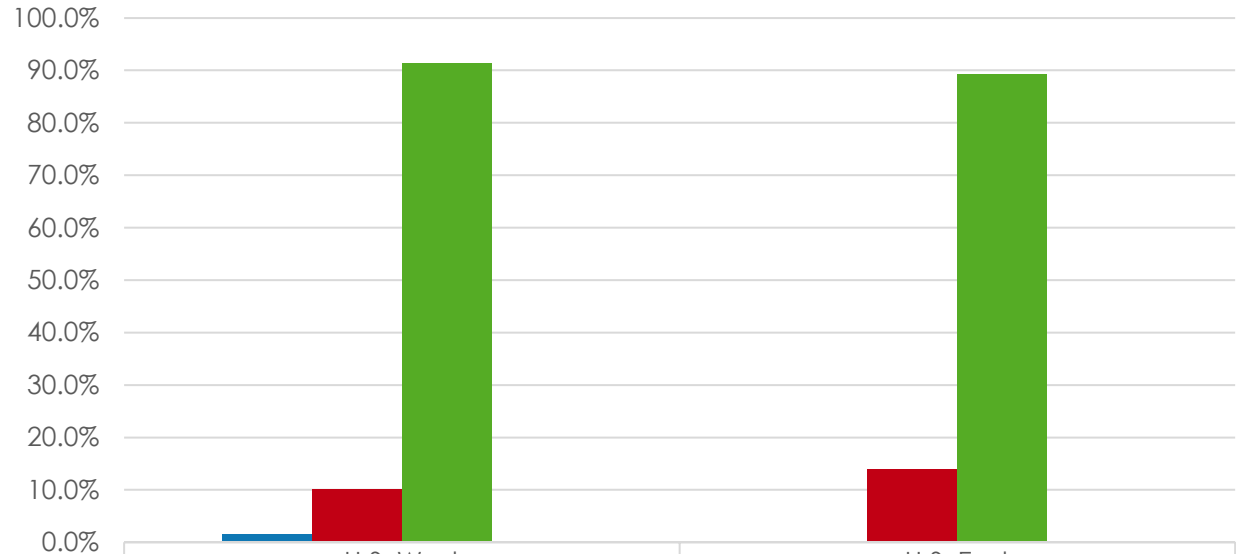
8-pt Rating Scale
8=Excellent / 1=Poor



TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
Been here before	51.9%	31.5%
Friend recommendation	30.1%	35.1%
Visiting Family/ Friends	2.5%	5.7%
Own a timeshare	3.4%	2.8%
Attending Conference/ Event	2.8%	1.9%
Article/ Blog	1.2%	5.8%
Location/ Never been, but went to other islands	1.6%	2.3%
Social Media Post	1.1%	1.9%
Nature/ Beauty/ Scenery	0.8%	2.4%
Advertisement	1.1%	1.5%
Travel Agent	0.0%	3.4%
Other (please specify)	0.7%	1.0%
Business related	0.8%	0.5%
Have timeshare/Have property/Renting	0.8%	0.0%
Package price/ affordability / cost	0.4%	1.0%
Cruise line stop/part of tour	0.4%	0.5%
Movie	0.0%	1.5%

SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ Neither of these	1.6%	0.0%
■ Full-face snorkel mask	10.2%	13.9%
■ 2-Piece, separate mask & snorkel	91.4%	89.3%
BASE	117	92

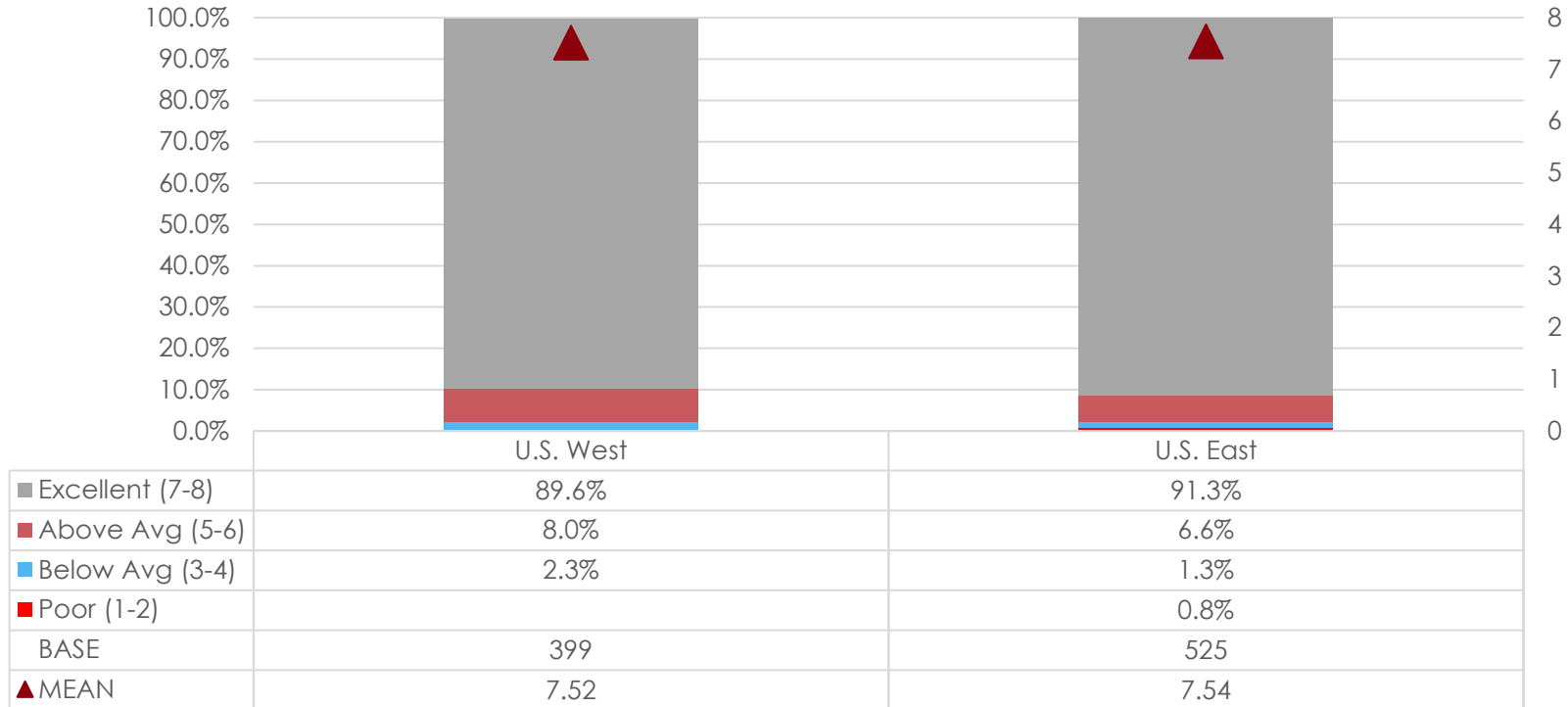
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
Did not have to be assisted or rescued		
Yes, needed assistance using 2 piece mask & snorkel	1.6%	2.3%
Yes, needed assistance using full face snorkel mask		
BASE	115	92

SECTION 7 – MAUI

SATISFACTION – MAUI

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

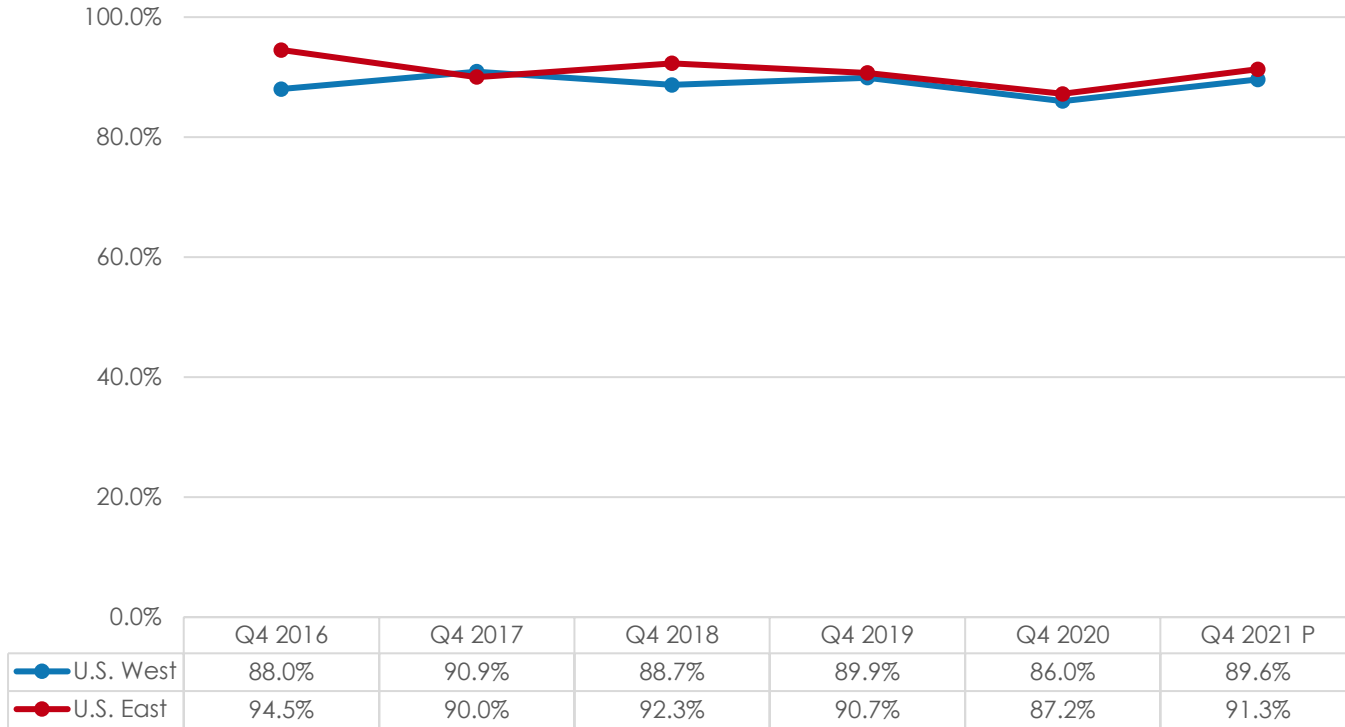


SATISFACTION – MAUI

- **Gender:** Satisfaction ratings for Maui were higher among female visitors from U.S. West compared to male visitors.
- **Travel agent:** Those visitors from U.S. West who used a travel agent gave Maui higher mean satisfaction scores compared to those who did not use a travel agent.
- **Travel party:** Amongst travelers from U.S. West, those who arrived in larger travel parties gave higher mean satisfaction scores.
- **Trips to the state:** U.S. West visitors who were first-timers to Maui gave higher satisfaction scores compared to those who have visited the state previously.

SATISFACTION – MAUI

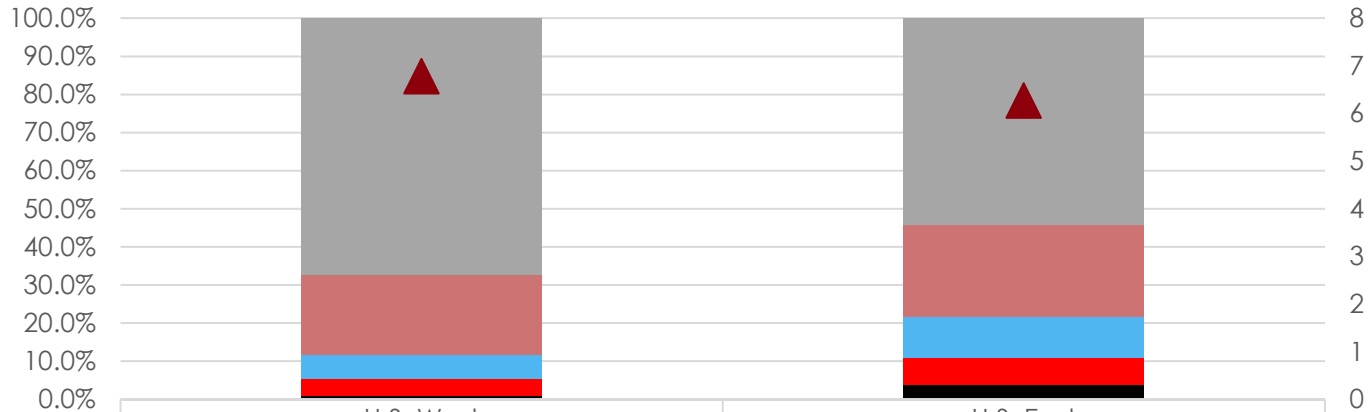
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – MAUI

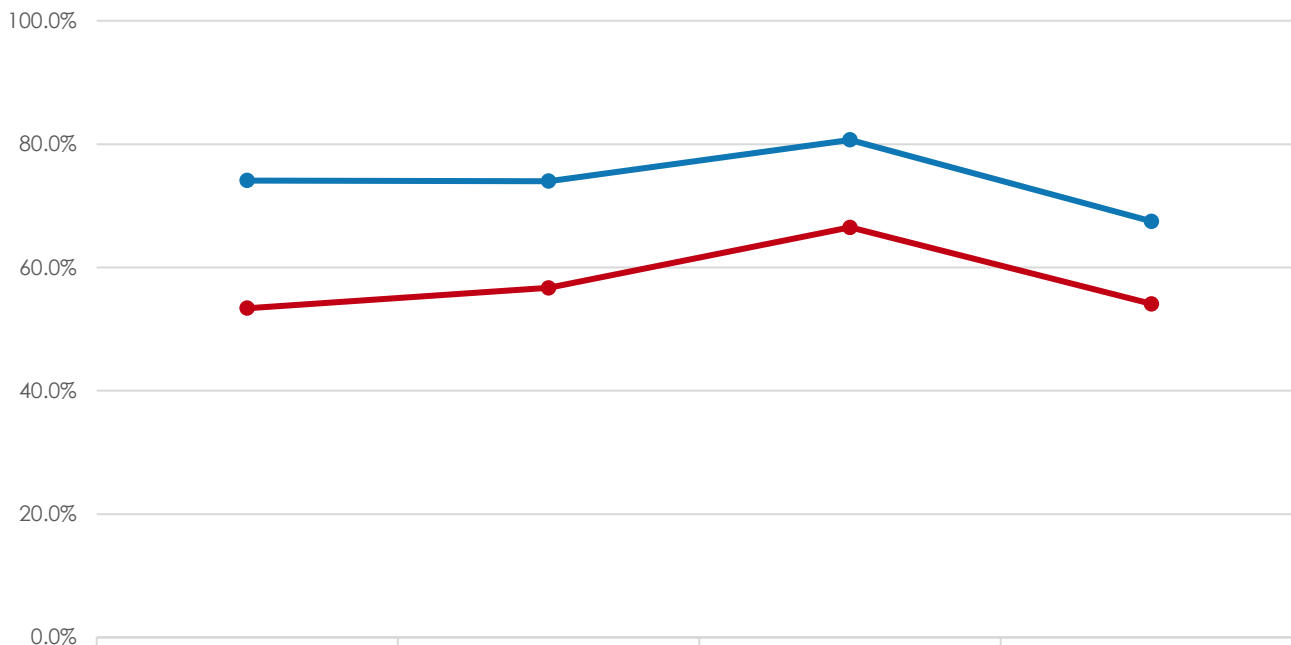
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	67.5%	54.1%
■ Somewhat likely (5-6)	21.1%	24.3%
■ Somewhat unlikely (3-4)	6.2%	10.6%
■ Very unlikely (1-2)	4.3%	7.3%
■ Not sure	1.0%	3.7%
BASE	377	463
▲ MEAN	6.78	6.27

LIKELIHOOD OF RETURN VISIT – MAUI

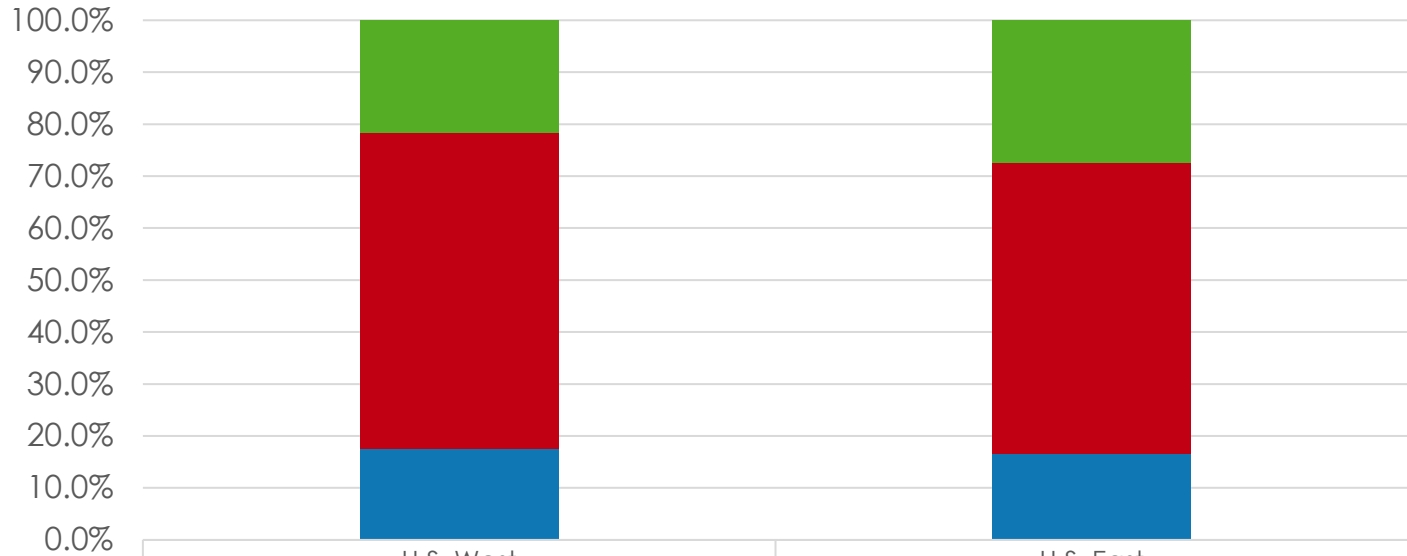
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021 P
U.S. West	74.1%	74.0%	80.7%	67.5%
U.S. East	53.4%	56.7%	66.5%	54.1%

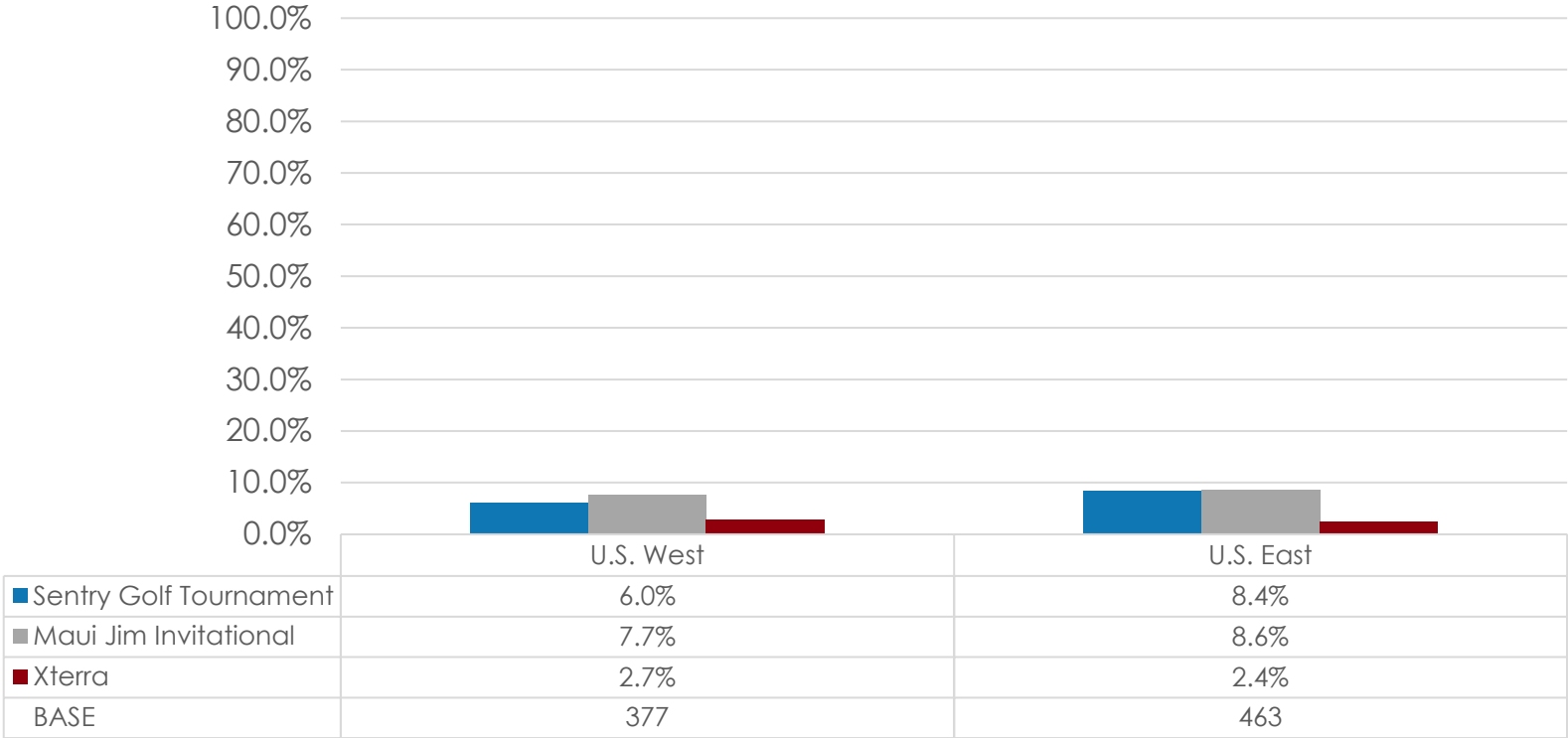
P= Preliminary Data

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	21.7%	27.4%
■ No Prior Awareness	60.8%	56.0%
■ Unsure	17.5%	16.6%
BASE	377	463

AIDED ADVERTISING AWARENESS – MAUI EVENTS



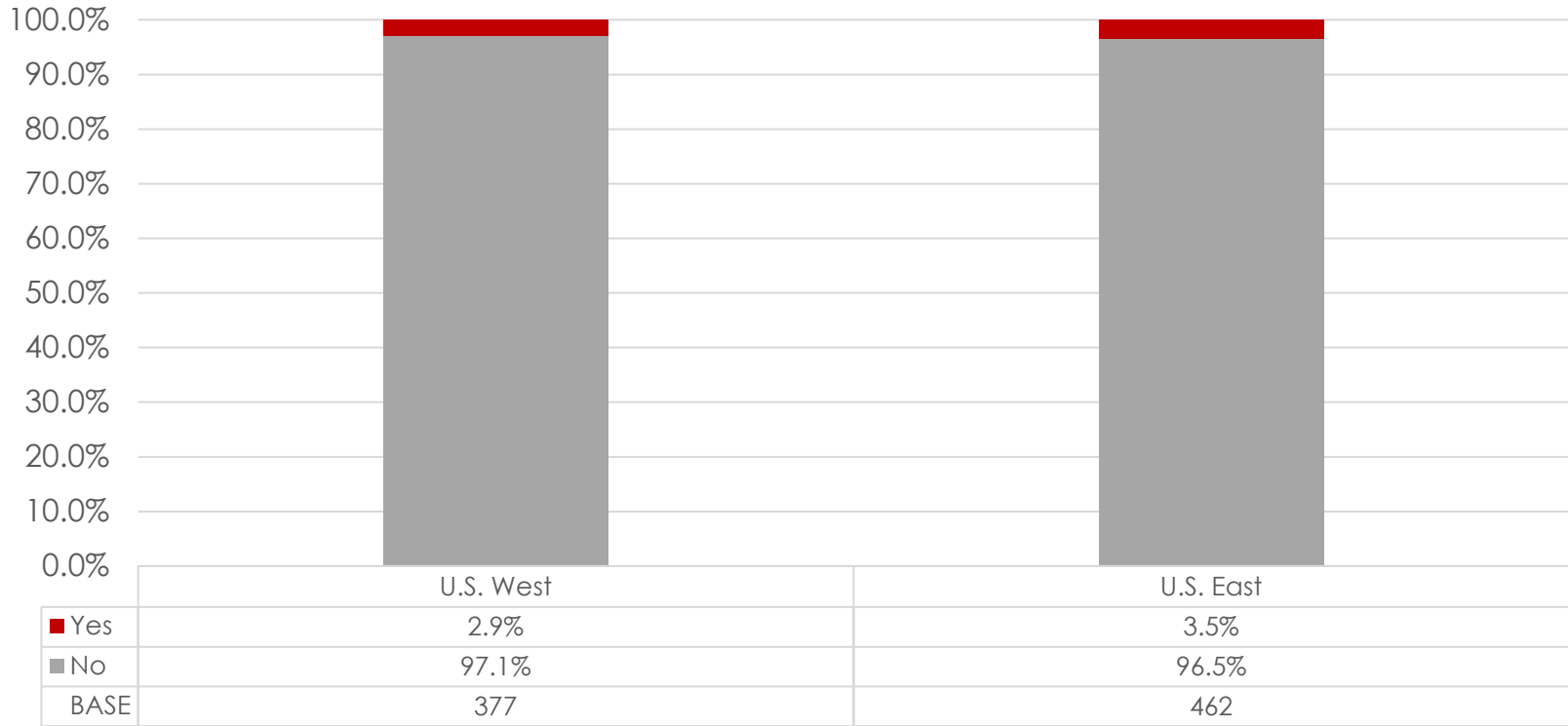
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
Famous landmarks or imagery/ natural beauty	44.1%	51.1%
Outdoor or sporting activities and events	19.1%	19.5%
Hawaiian cultural events	8.8%	15.2%
Social media posts and videos	8.2%	16.4%
Hawaiian Music	9.0%	6.6%
TV programs/ Movies filmed in Hawai'i	4.2%	10.5%
None of these	46.0%	36.1%

ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	1.7%	1.5%
Aquarium Maui /Maui Ocean Center	12.4%	19.1%
Baldwin Missionary Home Museum	3.8%	2.6%
Hale Pa'i Printing House	0.2%	0.0%
Haleakala National Park	28.3%	46.2%
Haleki'i Pihana Heiau State Monument	1.0%	1.9%
Hana Cultural Center	7.4%	9.2%
'Iao Valley State Monument	12.7%	16.4%
Kepaniwai Park & Heritage Gardens	1.7%	3.9%
Kula Botanical Garden	4.8%	8.0%
Maui Historical Society Bailey House Museum	1.4%	0.9%
Whaler's Village Museum	13.2%	11.6%
Wo Hing Temple Museum	2.5%	1.5%

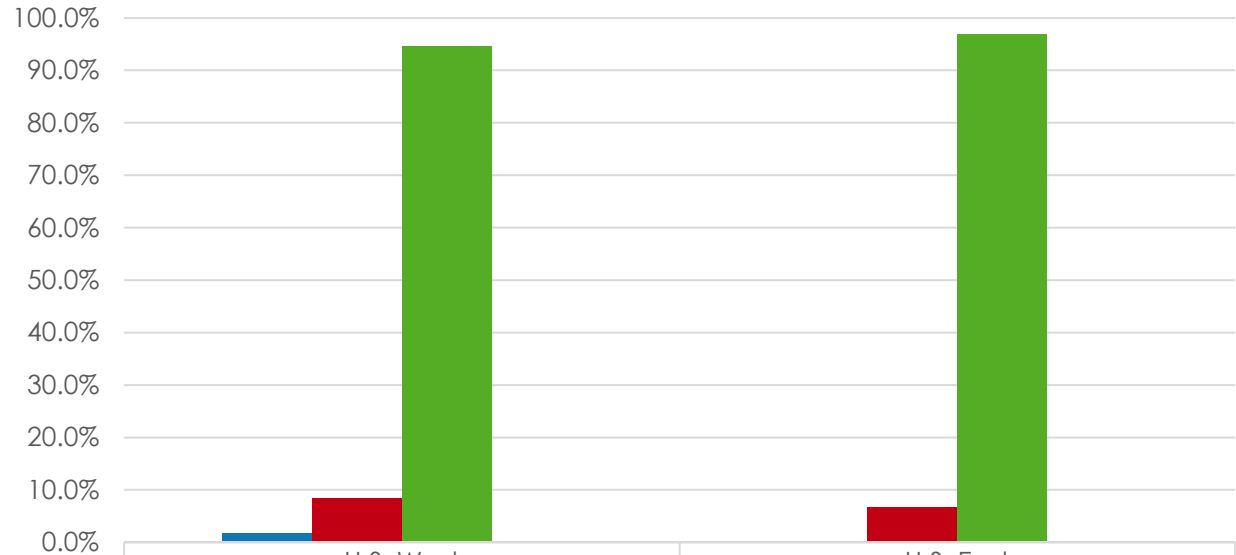
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Personal wedding/ honeymoon/ birthday/ funeral/ graduation	65.5%	62.2%
Convention/ conference/ workshop	25.9%	12.6%
Maui Jim Maui Invitational	8.6%	-
Other festival/ concert	-	6.5%
Xterra	-	6.5%
Kapalua Food & Wine	-	6.1%
Hawaii Food & Wine	-	6.1%
BASE	11	16

SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ Neither	1.8%	
■ Full-face snorkel mask	8.3%	6.6%
■ 2-Piece, separate mask & snorkel	94.6%	96.9%
BASE	209	257

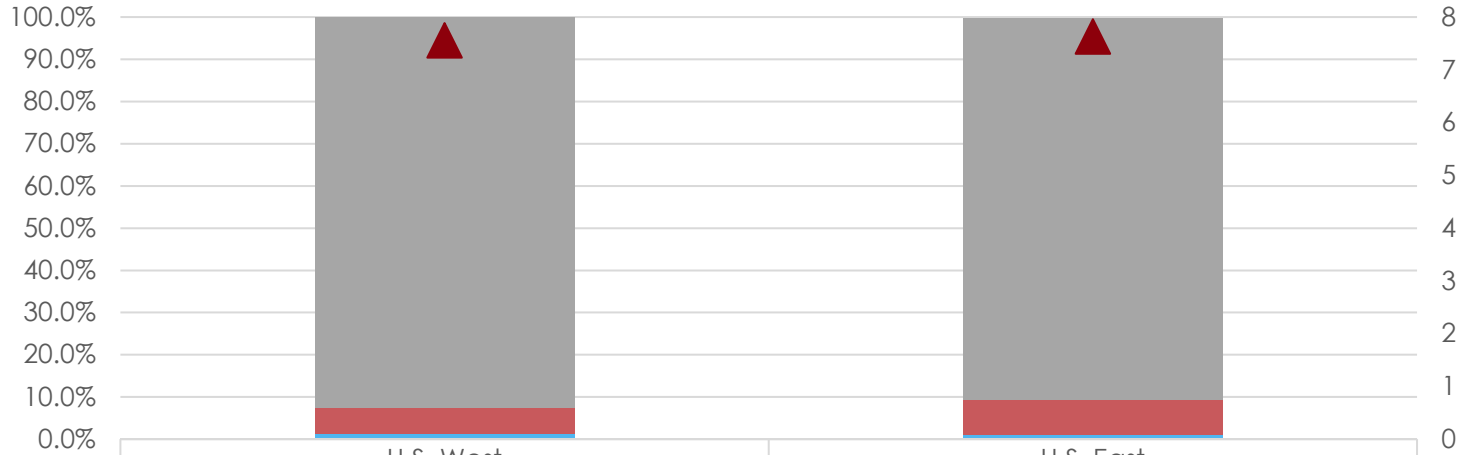
SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.8%	98.0%
Yes needed assistance two piece mask & snorkel	1.2%	2.0%
Yes, needed assistance full snorkel facemask	-	-
BASE	205	257

SECTION 8 – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

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



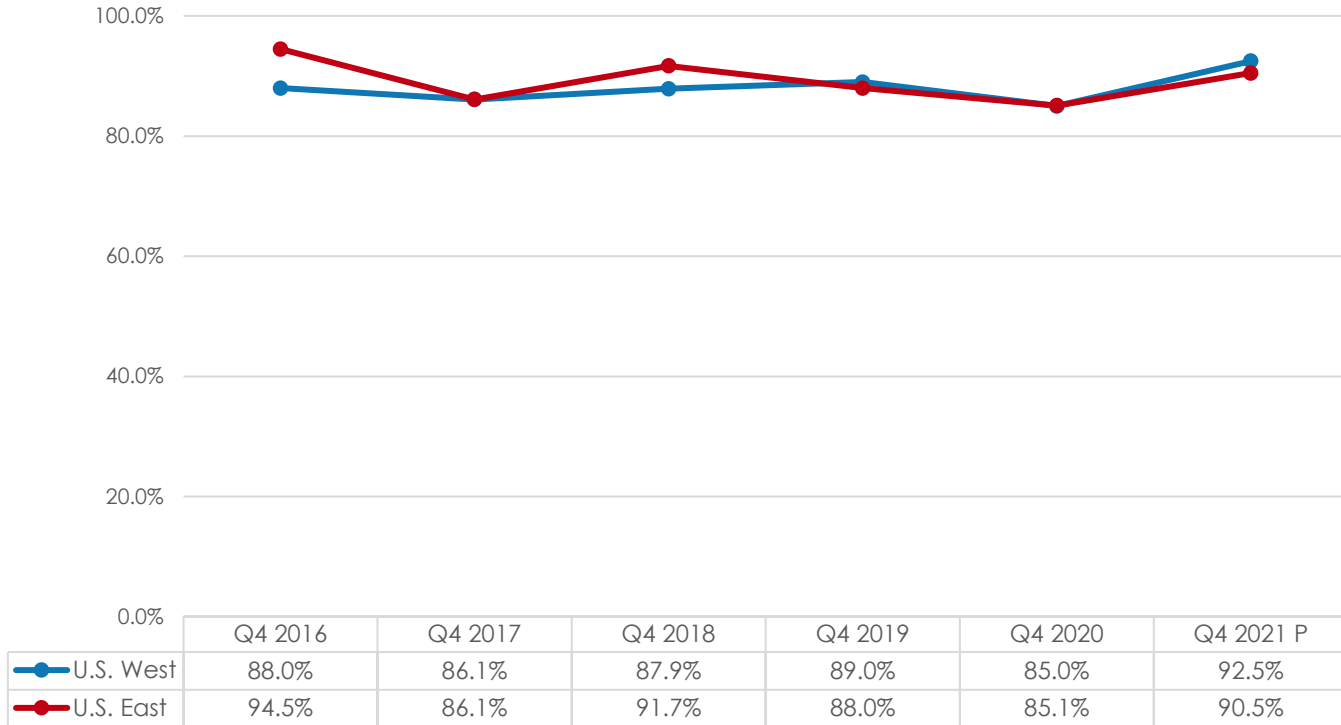
	U.S. West	U.S. East
■ Excellent (7-8)	92.5%	90.5%
■ Above Avg (5-6)	6.4%	8.6%
■ Below Avg (3-4)	1.1%	0.8%
■ Poor (1-2)		
BASE	222	233
▲ MEAN	7.56	7.63

SATISFACTION – ISLAND OF HAWAI‘I

- **Gender:** Female travelers from U.S. West were more satisfied with their stay on Hawai‘i Island compared to male visitors from this market.
- **Trips to the state:** Repeat visitors to the state were more satisfied with their stay on Hawai‘i Island than first-time visitors.

SATISFACTION – ISLAND OF HAWAII

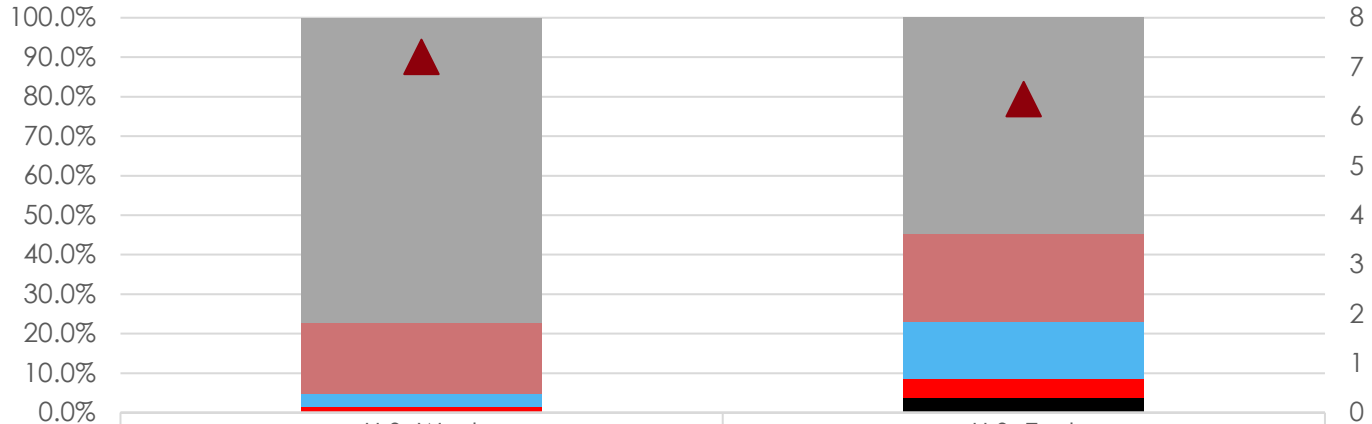
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

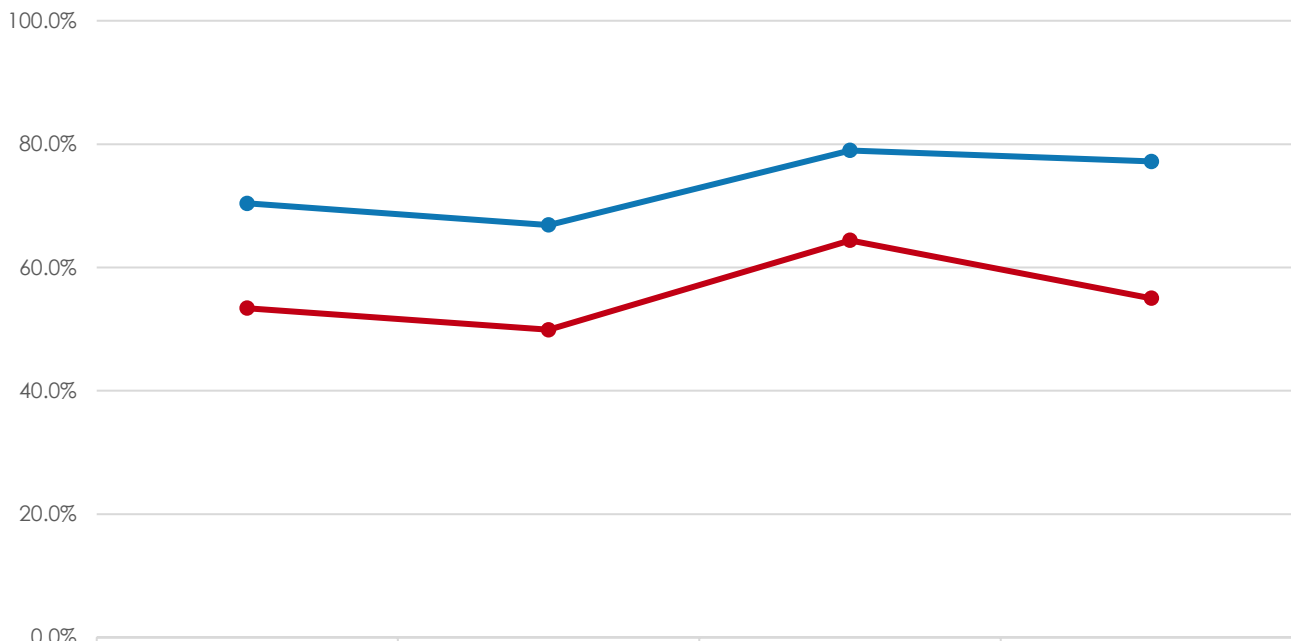
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	77.2%	55.0%
■ Somewhat likely (5-6)	18.0%	22.1%
■ Somewhat unlikely (3-4)	3.3%	14.3%
■ Very unlikely (1-2)	1.5%	5.0%
■ Not sure		3.7%
BASE	218	219
▲ MEAN	7.21	6.35

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

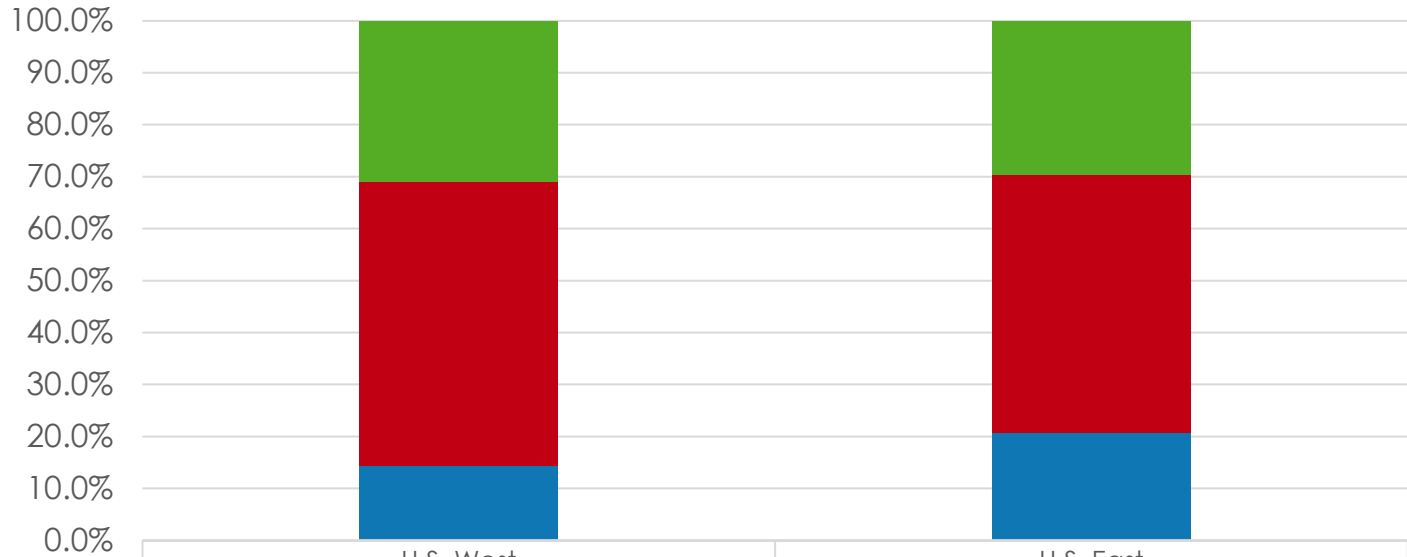
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021 P
U.S. West	70.4%	66.9%	79.0%	77.2%
U.S. East	53.4%	49.9%	64.4%	55.0%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	30.9%	29.7%
■ No Prior Awareness	54.7%	49.8%
■ Unsure	14.4%	20.6%
BASE	218	219

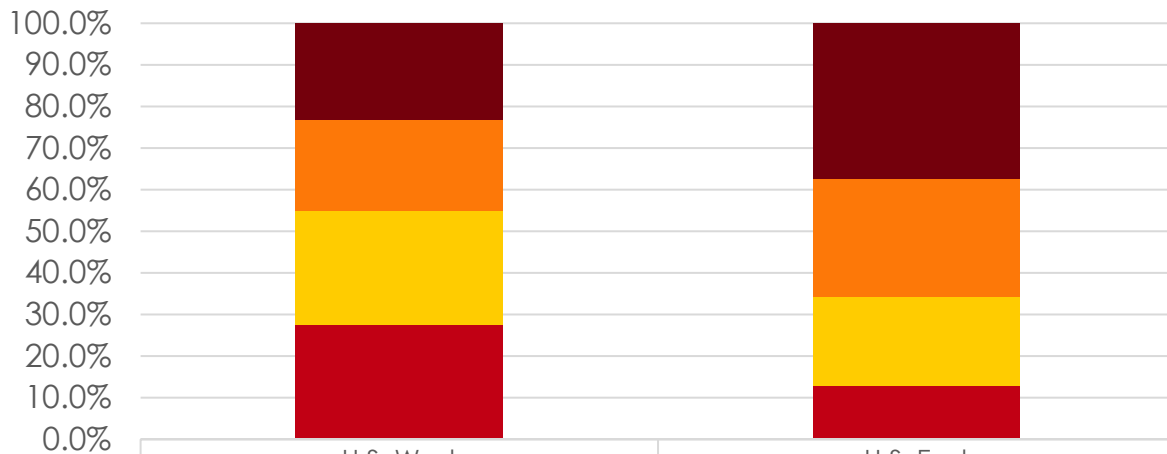
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	21.8%	38.0%
Botanical Gardens	15.8%	21.6%
H.N. Greenwell Store	4.8%	2.7%
Hawai'i Volcanoes National Park	59.3%	76.9%
Hilo Farmers Market	21.9%	25.6%
Hulihe'e Palace	5.5%	5.0%
'Imiloa Astronomy Ctr	0.9%	1.8%
Kaloko Honokohau National Historical Park	8.4%	12.7%
Kona Coffee Living History Farm	6.5%	13.7%
Lili'uokalani Park and Garden	7.0%	10.0%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

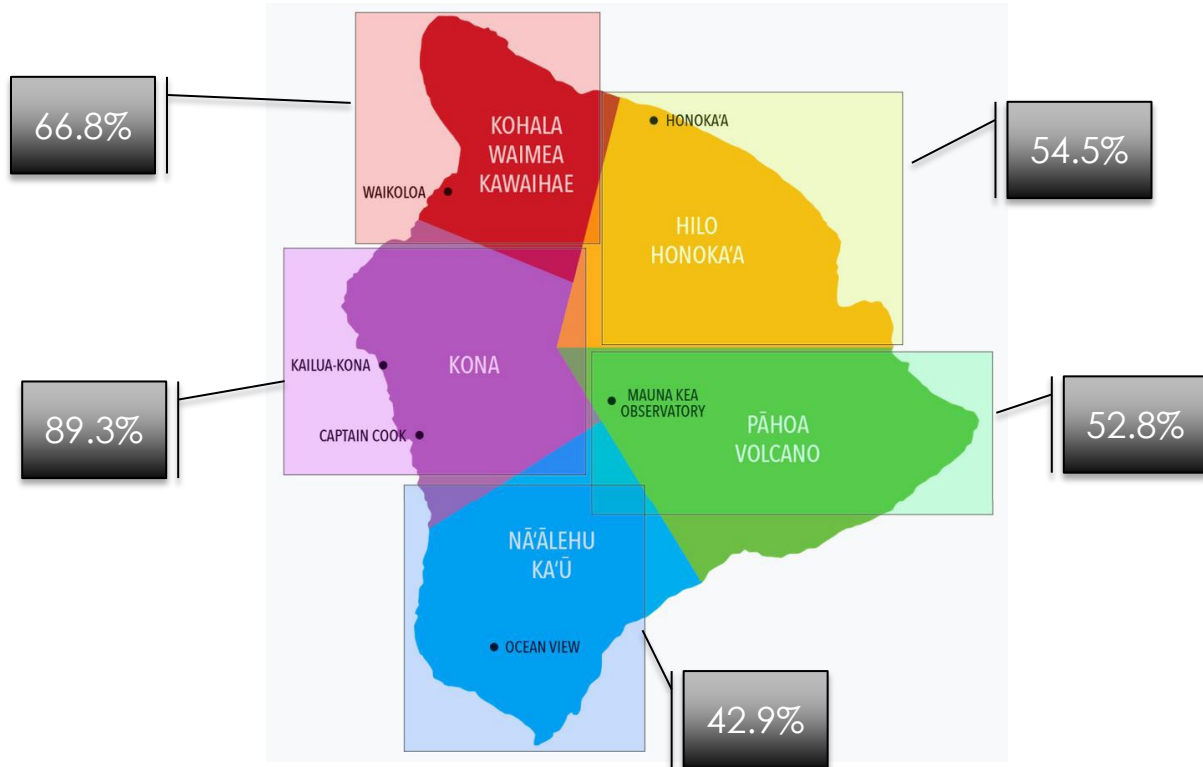
	U.S. West	U.S. East
Lyman House Memorial Museum	2.0%	1.4%
Maunakea	11.7%	24.6%
Orchid Farm	1.7%	3.2%
Pacific Tsunami Museum	1.7%	0.9%
Pana'ewa Rainforest Zoo & Garden	2.8%	3.2%
Pu'uuhonua o Honaunau National Historical Park	24.3%	23.3%
Pu'ukohola Heia National Historical Site	10.5%	12.3%
Punalu'u Black Sand Beach	37.1%	43.1%
Rainbow Falls	24.9%	37.2%
Volcano Art Center	9.3%	9.1%

TRAVEL ON ISLAND OF HAWAI'I

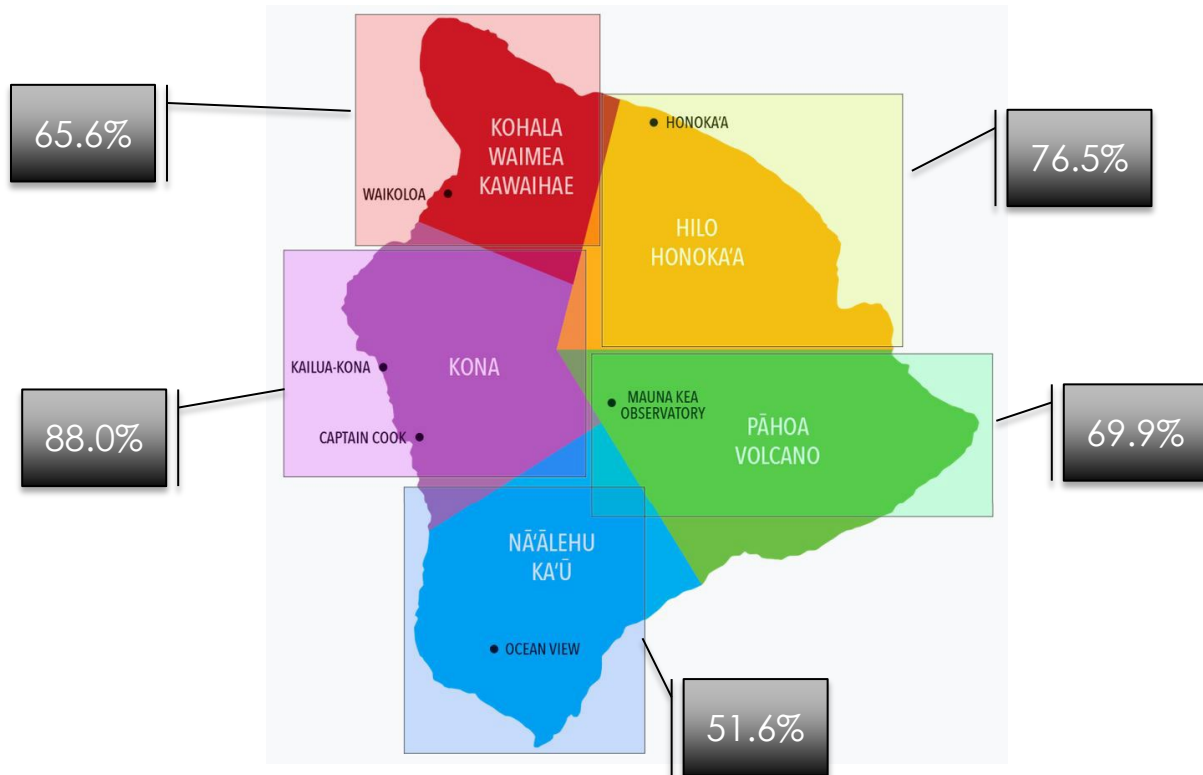


	U.S. West	U.S. East
Traveled to other side of island	23.2%	37.5%
Traveled more than 1 hour one way to reach activities	21.9%	28.3%
Traveled 1 hour or less one way to reach activity	27.3%	21.4%
Enjoy activities- short drive from accommodations	27.6%	12.8%
BASE	218	219

AREAS VISITED U.S. WEST

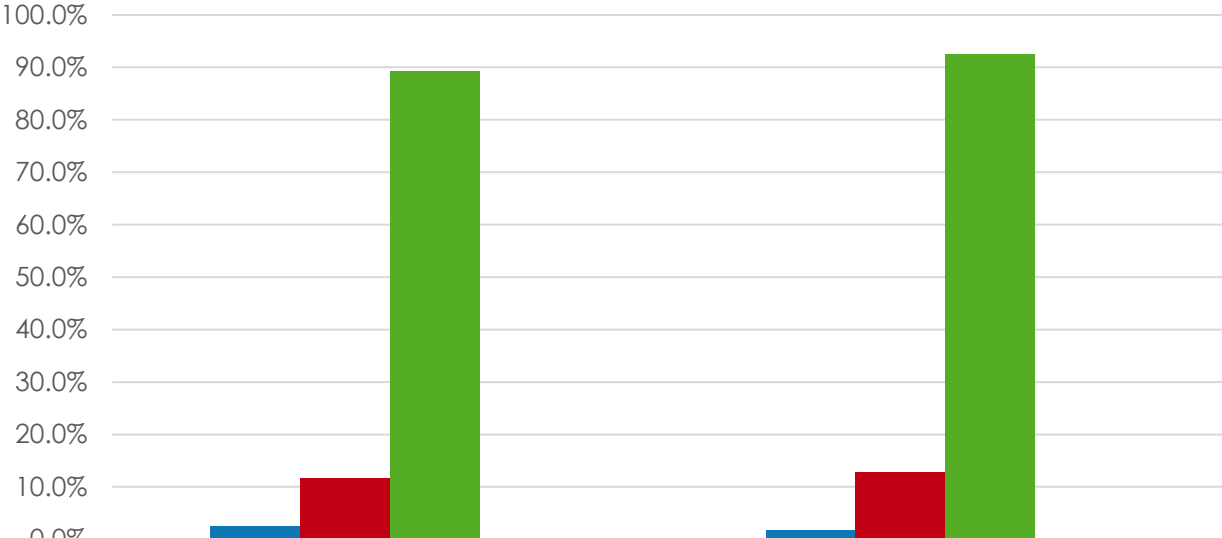


AREAS VISITED U.S. EAST



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

SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



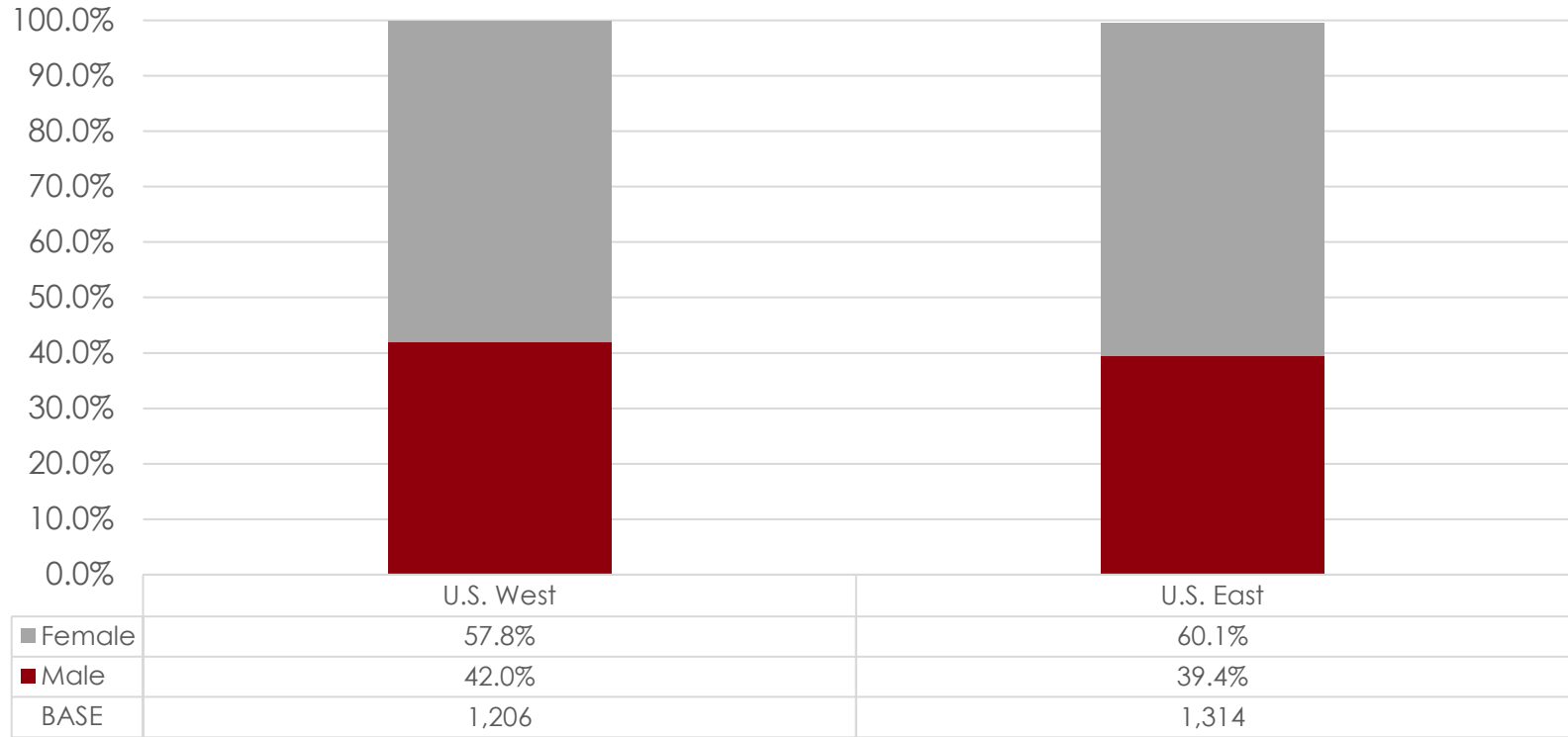
	U.S. West	U.S. East
■ Neither of these	2.4%	1.7%
■ Full-face snorkel mask	11.6%	12.8%
■ 2-Piece, separate mask & snorkel	89.2%	92.4%
BASE	118	117

SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

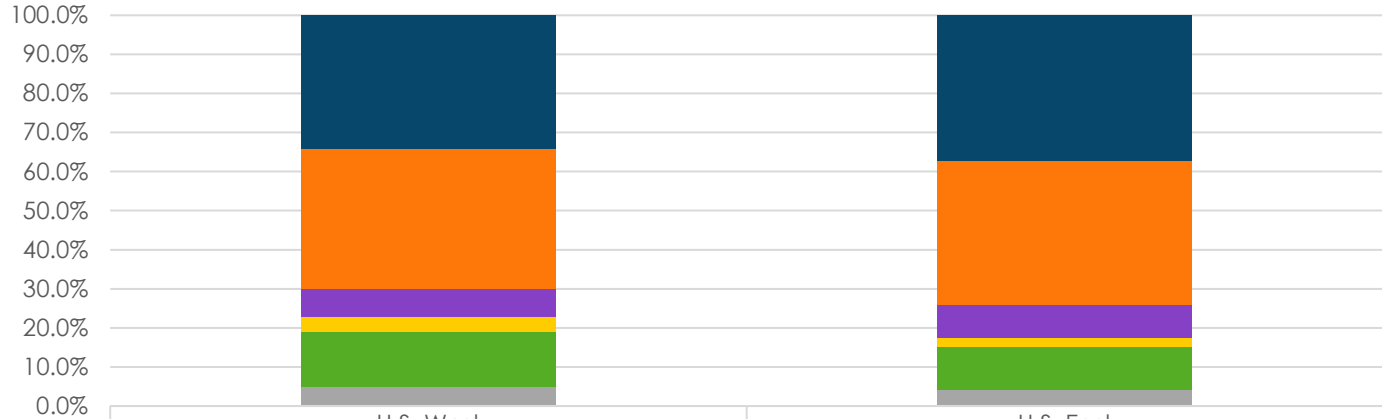
	U.S. West	U.S. East
Did not have to be assisted or rescued	98.7%	98.2%
Yes, needed assistance using 2 piece mask & snorkel	1.3%	1.8%
Yes, needed assistance using full face mask	-	-
BASE	115	115

SECTION 9 – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION

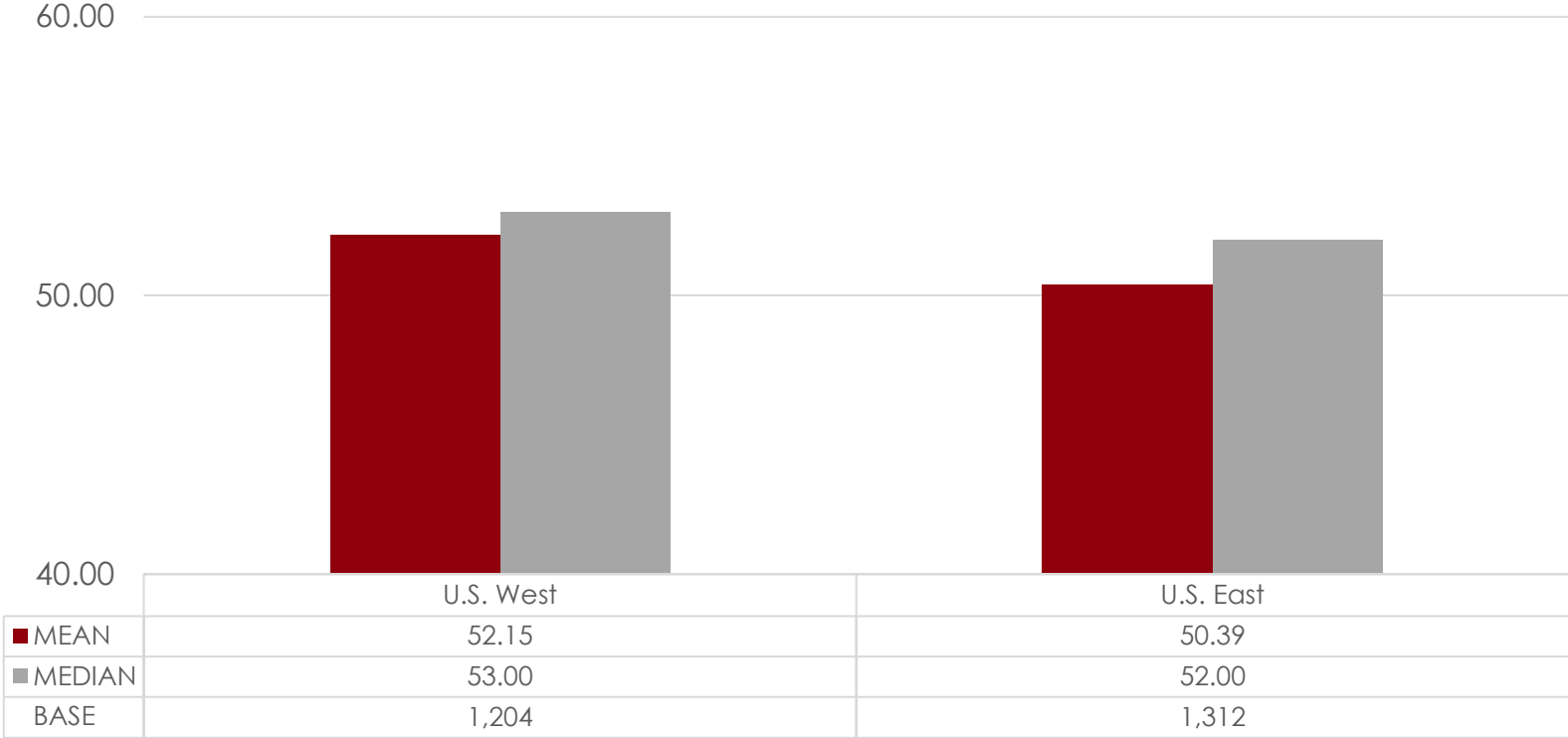


	U.S. West	U.S. East
■ Post-Graduate	34.2%	37.3%
■ College Grad	35.7%	36.7%
■ Associate Degree	7.3%	8.6%
■ Vocational/ Tech	3.7%	2.2%
■ Some College	14.2%	11.0%
■ High School Grad	4.6%	4.1%
■ Some / No High School	0.3%	0.1%
BASE	1,206	1,314

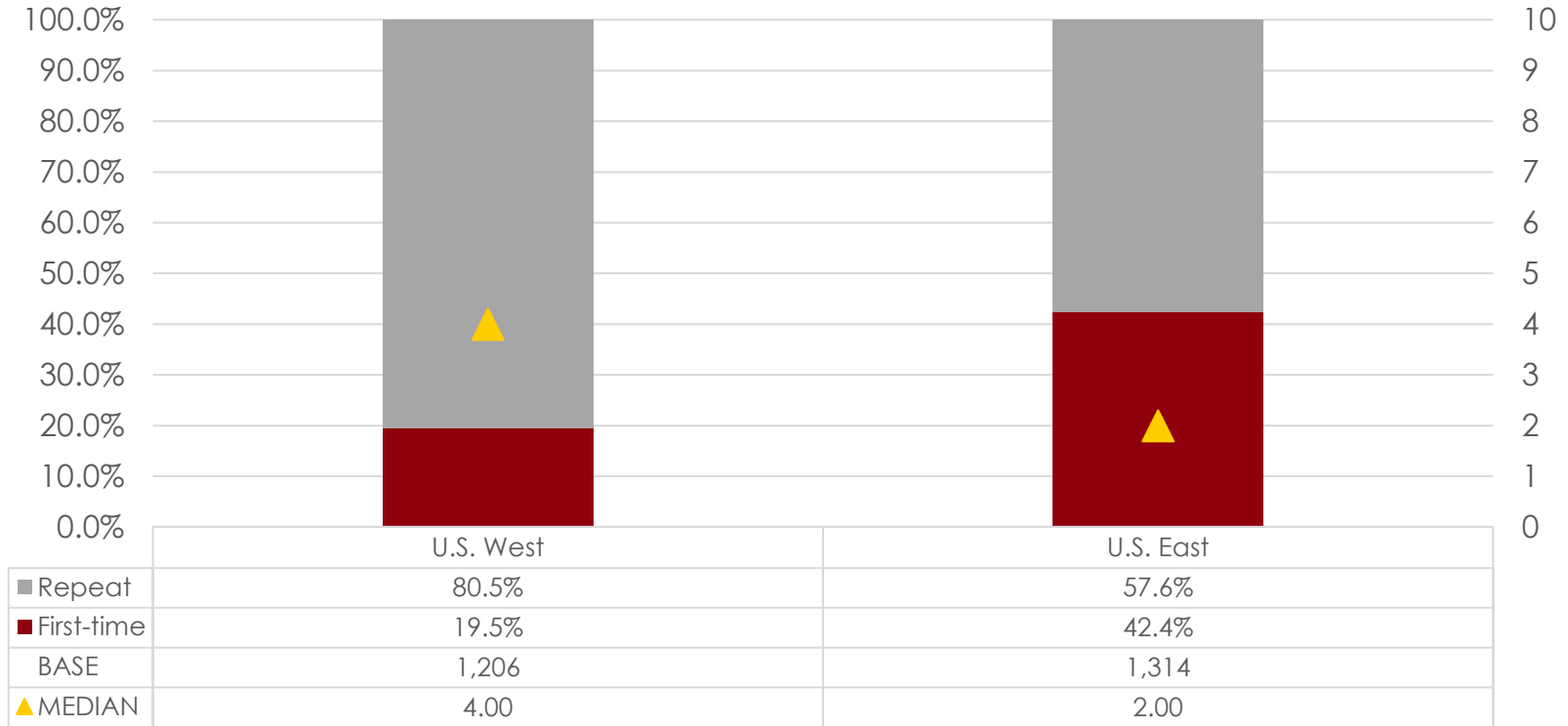
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	4.7%	5.3%
\$40,000 to \$59,999	5.4%	5.7%
\$60,000 to \$79,999	9.6%	10.9%
\$80,000 to \$99,999	9.3%	9.6%
\$100,000 to \$124,999	12.4%	13.9%
\$125,000 to \$149,999	12.6%	10.2%
\$150,000 to \$174,999	10.7%	10.2%
\$175,000 to \$199,999	8.2%	6.1%
\$200,000 to \$249,999	8.0%	9.1%
\$250,000 +	19.0%	19.0%

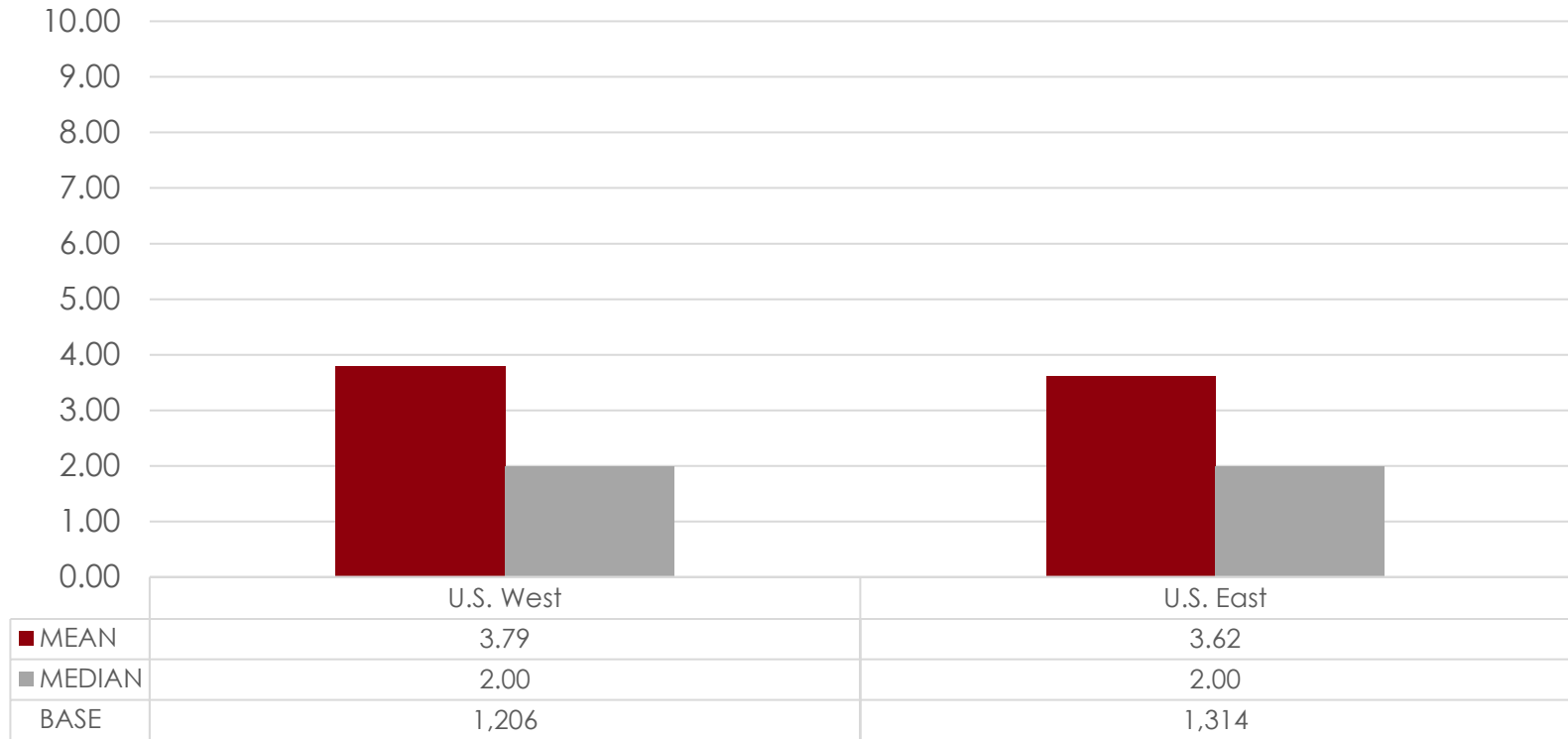
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAI‘I



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
Spouse	61.7%	61.3%
Other adult members of my family	30.1%	29.1%
Child/ grandchild under 18	21.9%	17.2%
Friends/ associates	18.9%	15.4%
Alone	7.9%	10.6%
Girlfriend/ boyfriend	8.2%	6.2%
Same gender partner	1.4%	0.7%

SECTION 10 – ISLAND SURVEY METHODOLOGY

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

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

Visitor market	Completed	Margin of Error \pm
U.S. West	469	4.53%
U.S. East	694	3.72%
All visitor markets	1,163	2.87%

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

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

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

Visitor market	Completed	Margin of Error \pm
U.S. West	231	6.45%
U.S. East	212	6.73%
All visitor markets	443	4.66%

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

Visitor market	Completed	Margin of Error \pm
U.S. West	399	4.91%
U.S. East	525	4.28%
All visitor markets	924	3.22%

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



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

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

Visitor market	Completed	Margin of Error \pm
U.S. West	222	6.58%
U.S. East	233	6.42%
All visitor markets	455	4.59%

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