

# VISITOR SATISFACTION STUDY QUARTER 1, 2025

State of Hawai'i  
Department of Business, Economic Development & Tourism

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# Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 1, 2025 report include survey results from: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, Europe, Korea and China.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	1,707	2.37	7.18
U.S. East	1,096	2.96	6.22
Japan	216	6.67	17.16
Canada	598	4.01	12.43
Oceania	138	8.34	7.32
China	61	12.55	5.63
Korea	232	6.43	31.18
Europe	248	6.22	8.51
All visitor markets	4,296	1.50	7.94

# Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-flight and International Departure Intercept surveys. Selected visitors from the U.S., Japan, Canada, Oceania, Korea, China and Europe were sent an email invitation with a link to complete the survey online. Intercept surveys were also conducted by trained interviewers with departing visitors from Korea and Japan at the Daniel K. Inouye International Airport in Honolulu.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 1, 2025. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

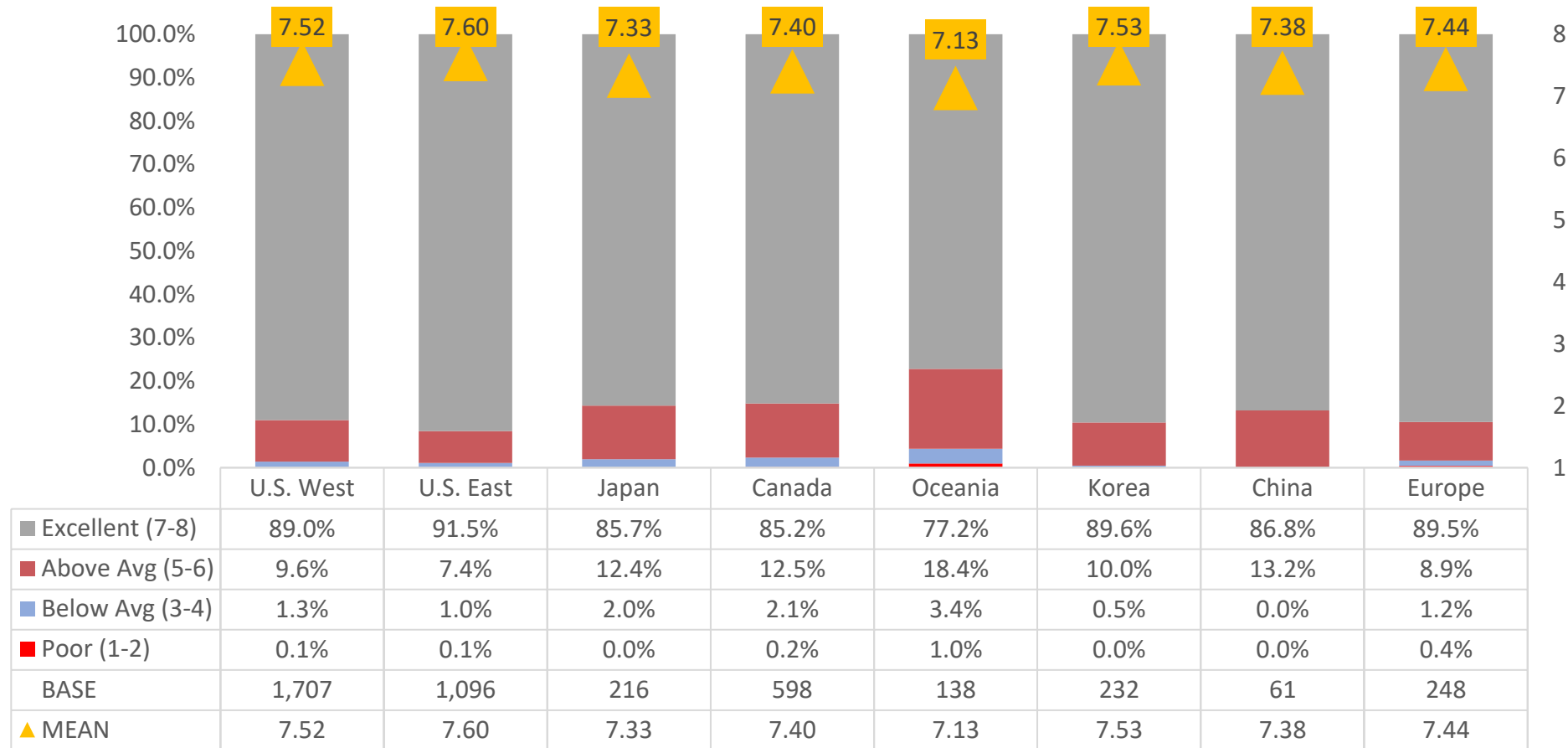
Data for 2025 and 2024 are preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

*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.*

# Section 1 – Visitor Satisfaction

# SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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

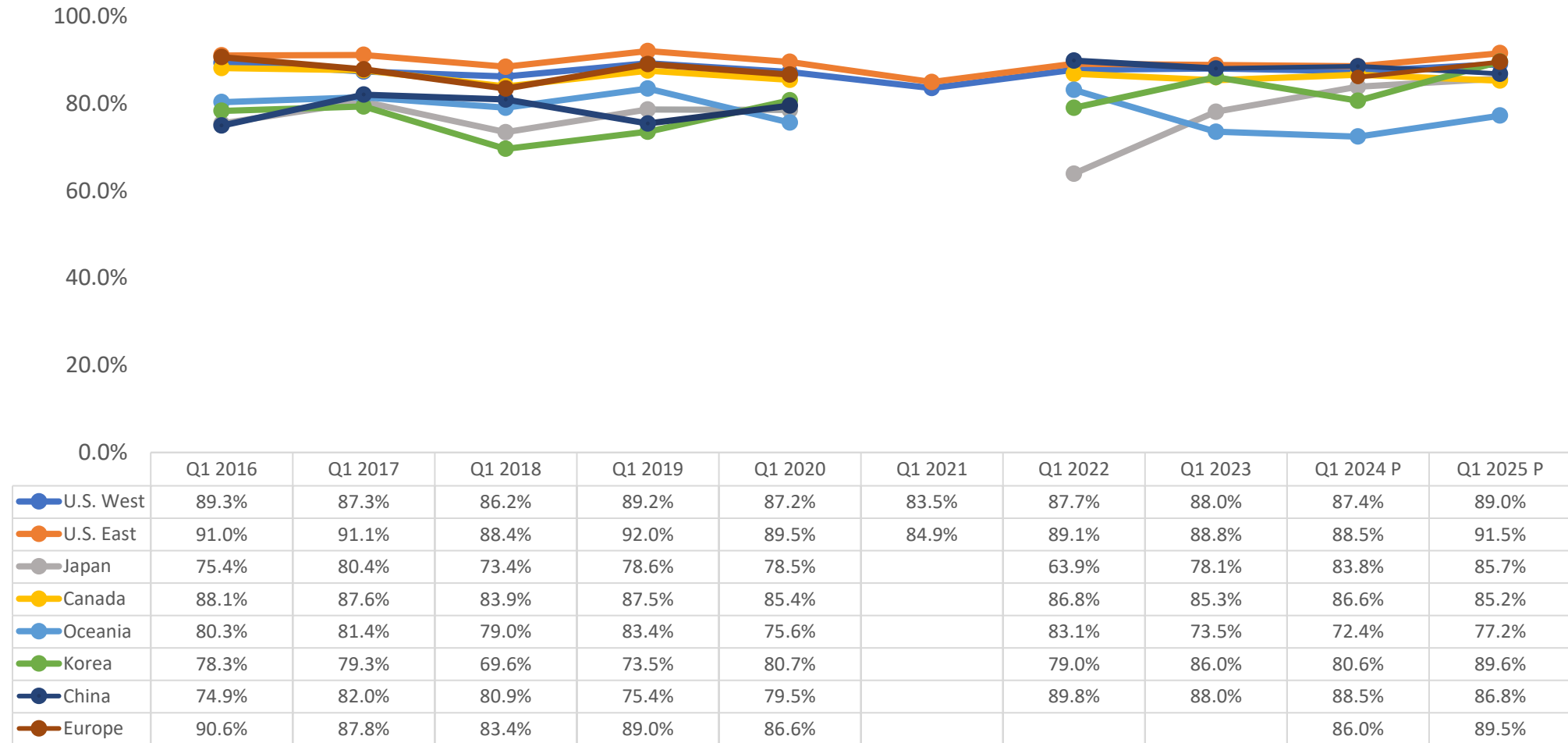


# SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** give higher satisfaction scores than male respondents from this visitor market.
- **Age:** Satisfaction is lowest among senior visitors (65 years and older) from **Japan** compared to those younger from this visitor market.
- **Trips to Hawai‘i:** Repeat visitors from **U.S. West** give higher satisfaction scores than first-time visitors from this market.
- **Travel party size:** Visitors from **U.S. East** in larger (3+ persons) travel parties give higher satisfaction scores than those traveling alone.

# SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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



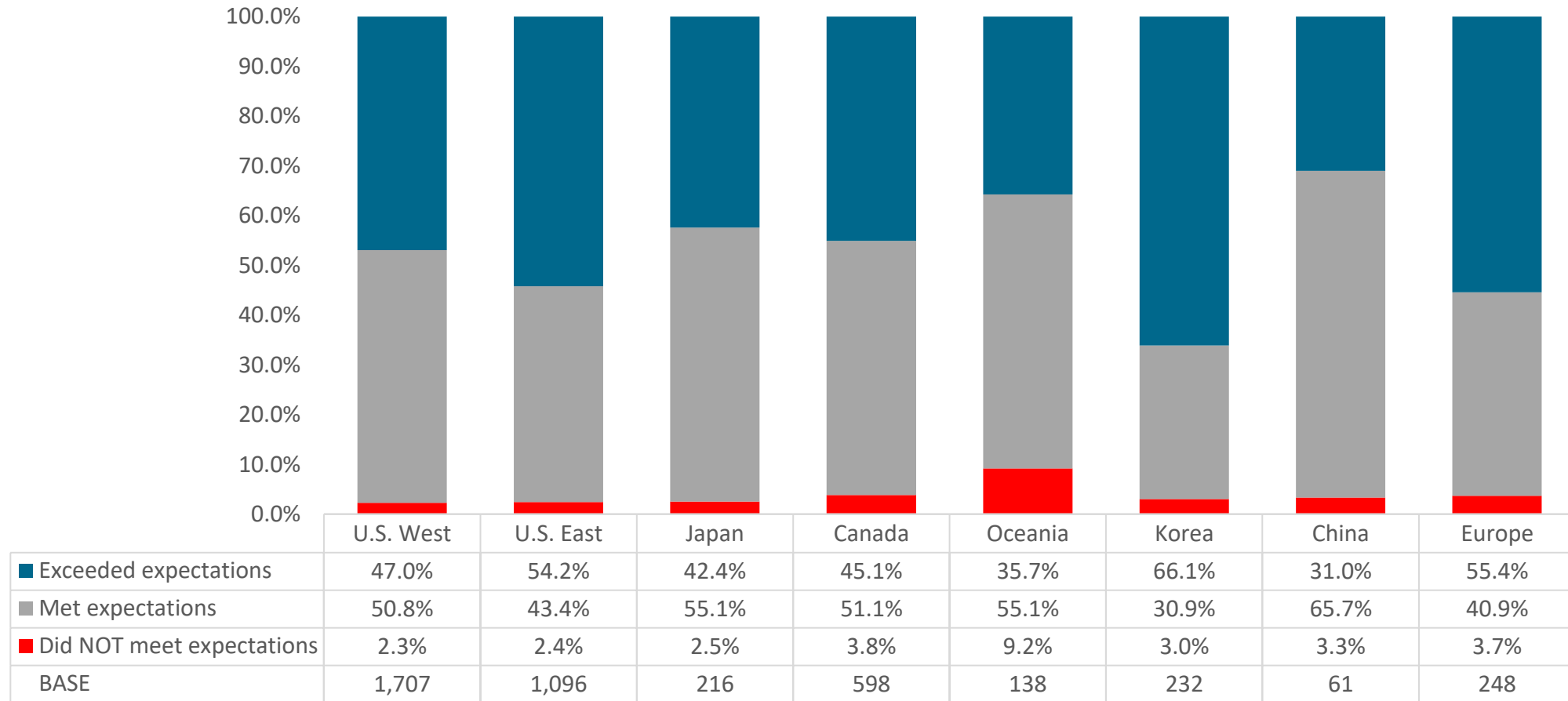
P= Preliminary Data

Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

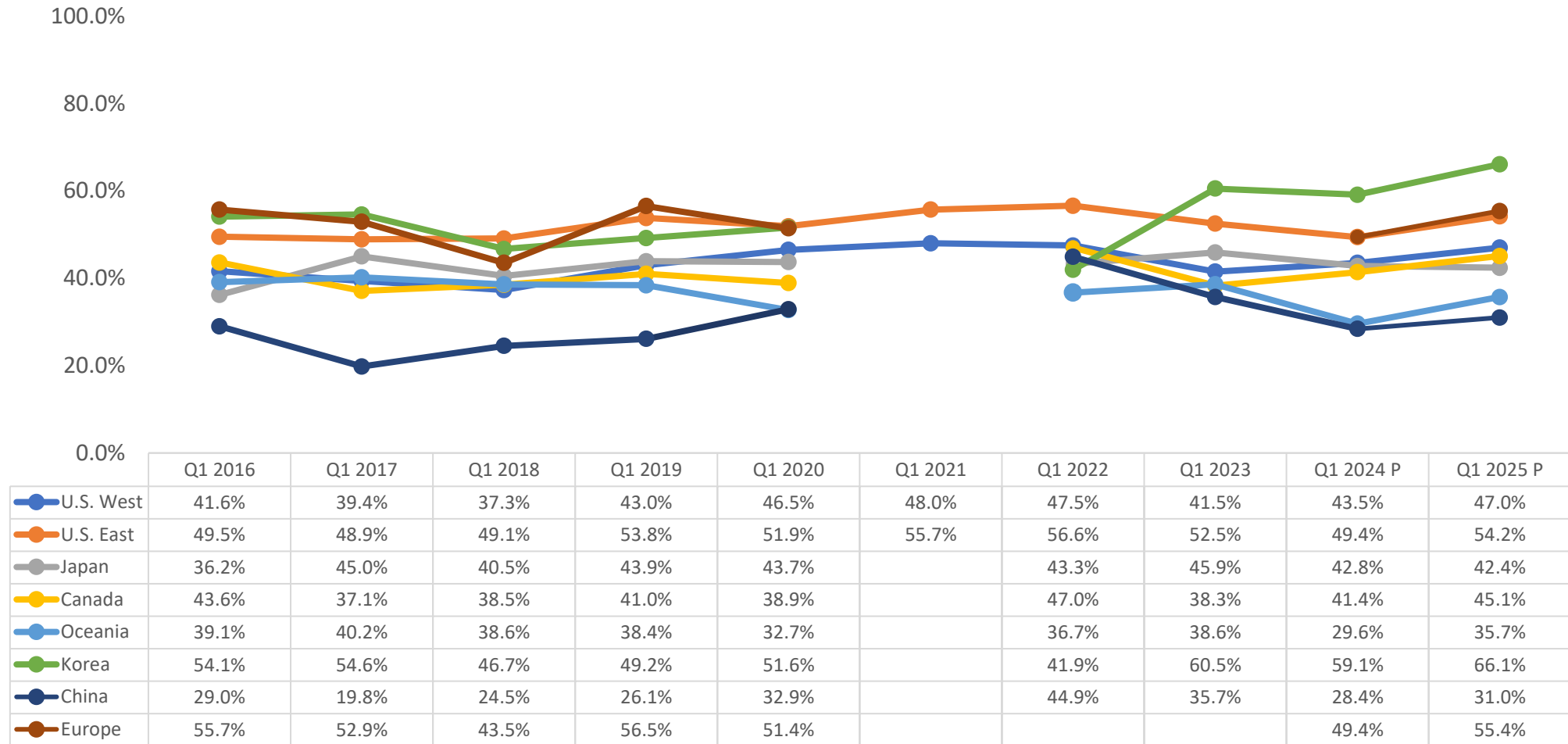


# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- ***Trips to Hawai‘i:*** First-time visitors from the following visitor markets are more likely to feel their trip exceeded their expectations than repeat visitors: **U.S. West, U.S. East, Canada** and **Japan**.
- ***Age:*** Younger respondents from **U.S. West** (18 – 34 years old), **U.S. East** (18 – 49 years old), **Canada** (18 – 34 years old) and **Japan** (18 – 34 years old), are more likely to respond that their trip exceeded expectations compared to visitors from these markets in older age groups, particularly seniors.
- ***Gender:*** Female visitors from **U.S. West, U.S. East** and **Canada** gave higher mean satisfaction scores compared to male visitors from these markets.
- ***Islands visited:*** Visitors from **U.S. West** whose trip was limited to a single island are more likely to feel their trip exceeded their expectations compared to those whose trip included stays on multiple islands.
- ***Education:*** College graduates from **U.S. East** are more likely to feel their trip exceeded their expectations compared to visitors from this market without a college degree.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

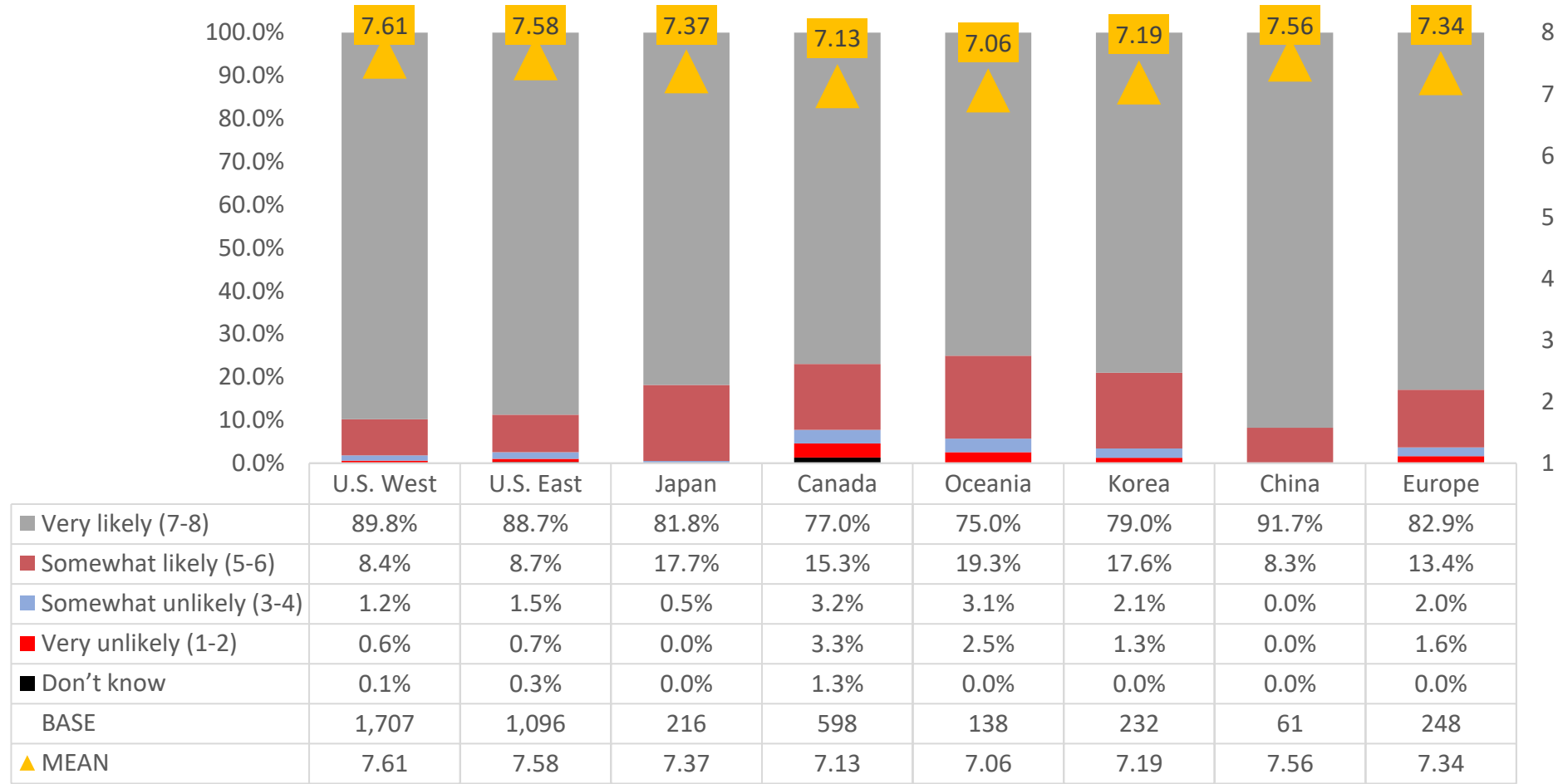


P= Preliminary Data

Q. Would you say this trip to Hawai'i \_\_\_\_?

# BRAND/ DESTINATION - ADVOCACY

8-pt Rating Scale  
8=Very likely / 1=Very unlikely

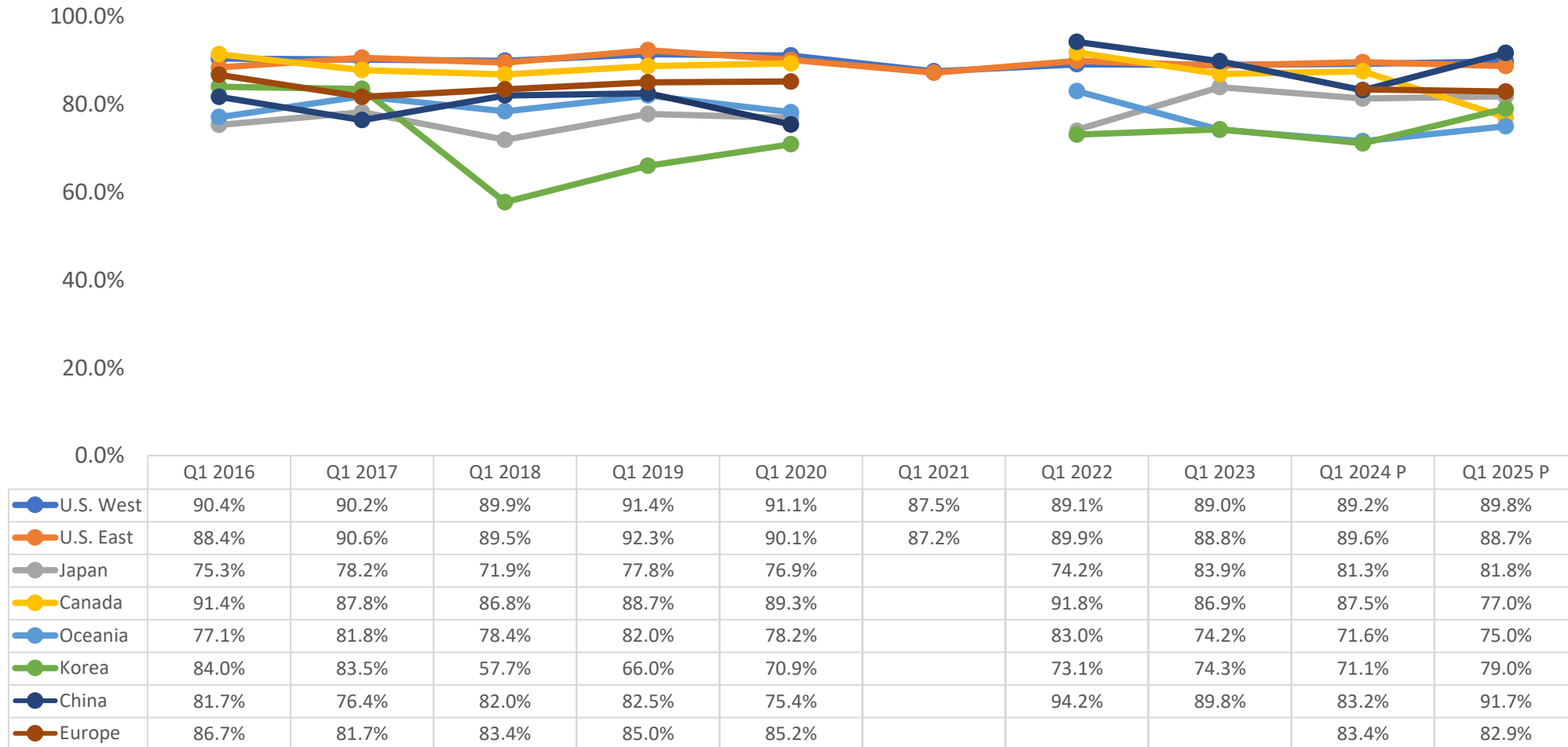


# BRAND/ DESTINATION – ADVOCACY

- **Gender:** Female respondents from **U.S. West** and **Japan** are more likely to recommend the state to others than male respondents from these visitor markets.
- **Trips to Hawai'i:** Brand advocacy scores are higher amongst repeat visitors from **U.S. West**.
- **Education:** Visitors without a college degree from **U.S. West** are more likely to recommend the state than college graduates.
- **Travel party size:** Visitors from **U.S. East** traveling alone are least likely to recommend the state compared to those traveling in parties of 2+ persons from this visitor market.
- **Age:** Senior visitors from **Japan** (65 years and older) are least likely to recommend the state compared to younger travelers from this market.

# BRAND/ DESTINATION - ADVOCACY

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



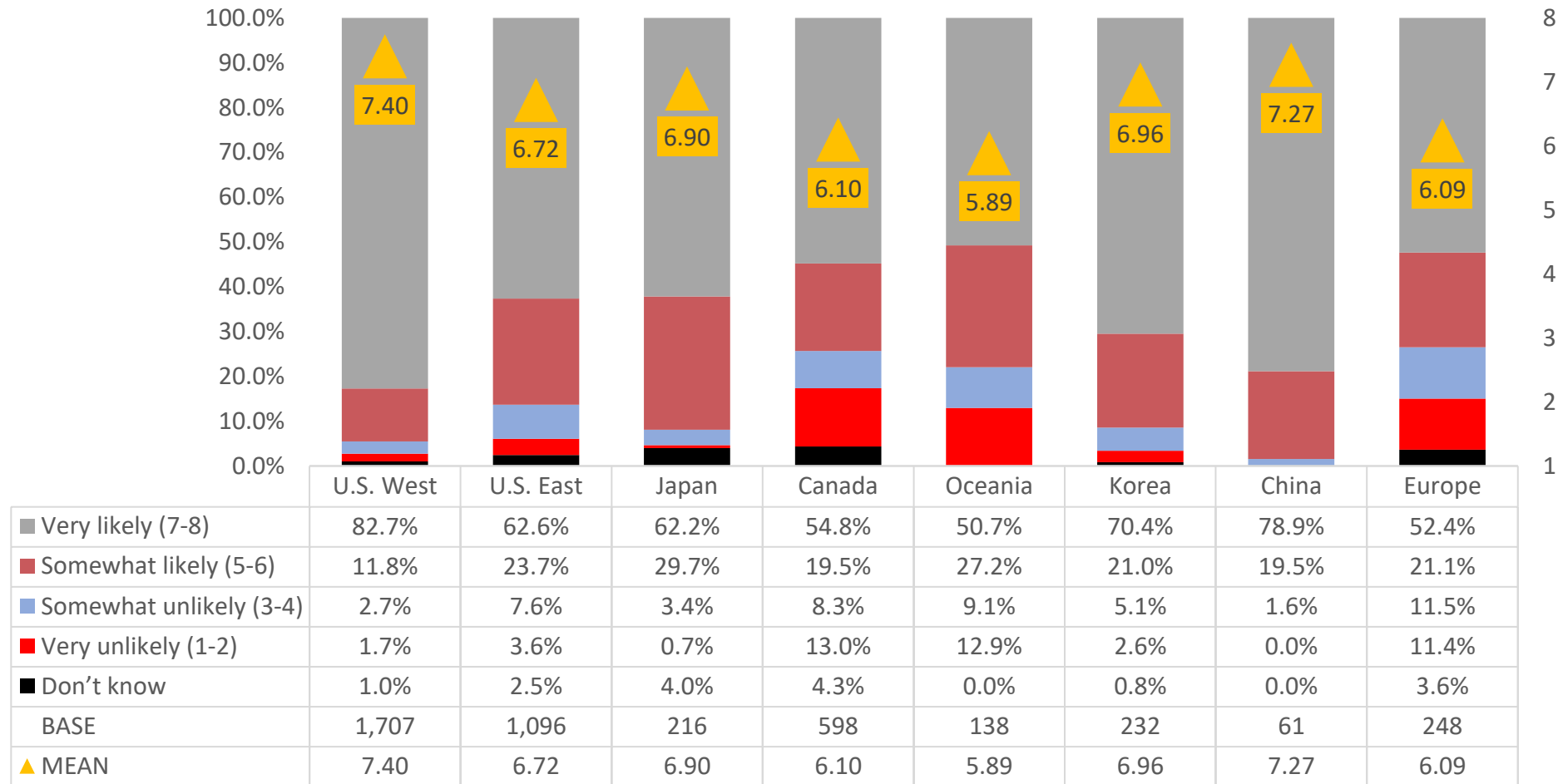
P= Preliminary Data

Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

# LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale  
8=Very likely / 1=Very unlikely



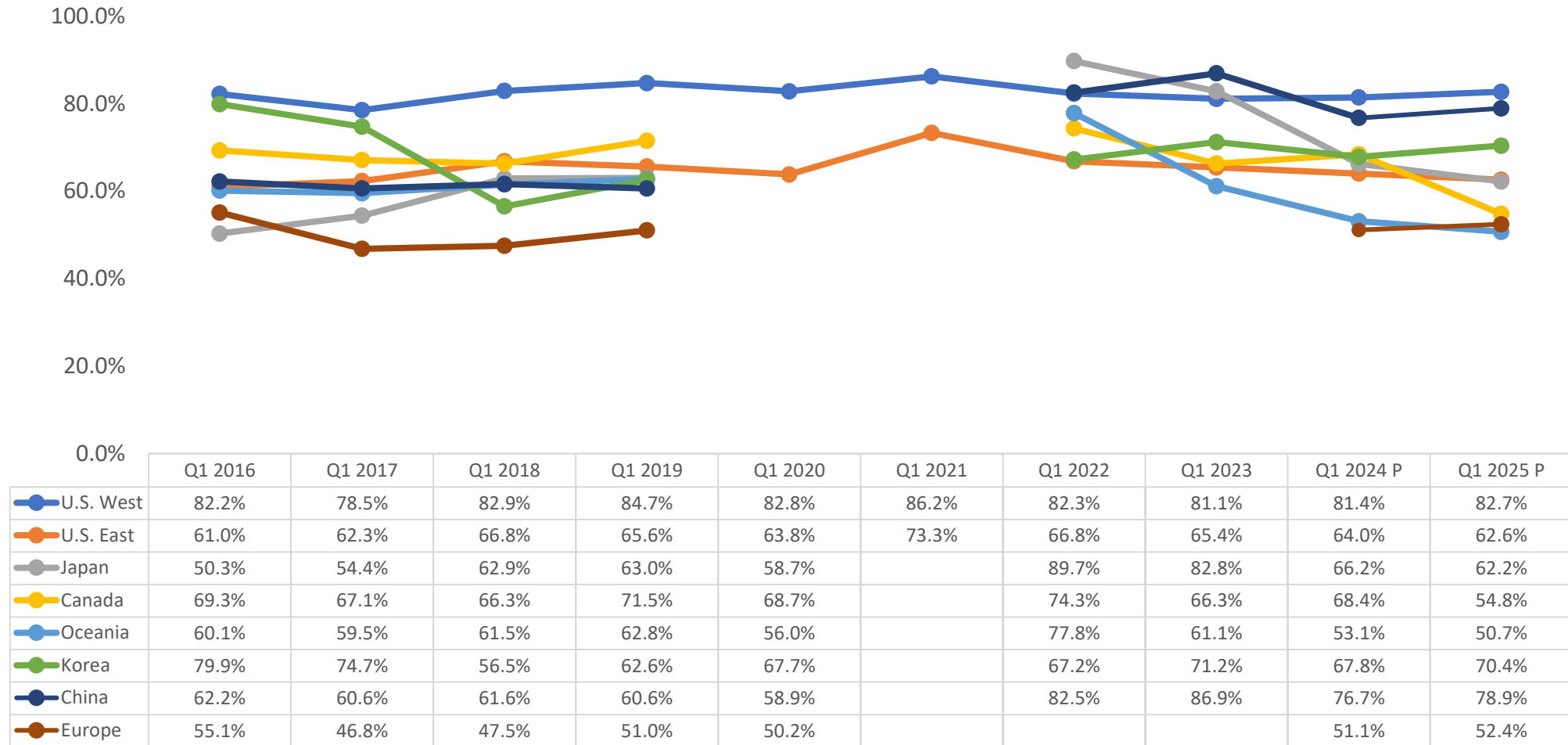
# LIKELIHOOD OF RETURN VISIT

- **Gender:** Male respondents from **U.S. East** express a greater likelihood to return to Hawai'i than female respondents from this visitor market.
- **Trips to Hawai'i:** Repeat visitors from the following visitor markets express a greater likelihood of returning to the state than first-time visitors: **U.S. West, U.S. East, Oceania, and Japan.**
- **Islands visited:** Visitors from **U.S. West** and **U.S. East** whose trip consisted of visiting a single island express a higher likelihood of returning to the state than those who visited multiple islands during their stay. Conversely, travelers from **Japan** who visited multiple islands are more likely to return.
- **Travel party size:** Those visitors from **U.S. West** who traveled to the state by themselves express a higher likelihood of return than those who traveled here with at least one other person.
- **Household income:** Visitors from **U.S. West** who reside in homes in the upper income tier (\$150K+) express a higher probability of returning to the state than less affluent travelers from this market.
- **Education:** Travelers without a college degree from **U.S. West** express a stronger likelihood to return.



# LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

Q. How likely are you to return to the state of Hawai‘i in the next five years?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

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

Q1 2024 P	Q1 2025 P
59.7% Too expensive 33.0% Want to go someplace new 30.6% Poor value 25.6% Too crowded/ congested 19.5% Five years is too soon to revisit 17.1% No compelling reason to return 16.9% Too commercialized/ overdeveloped 12.2% Flight too long 11.0% Poor service	47.9% High cost of travel 18.2% Preference for other destinations 11.8% Cultural and environmental concerns 10.4% Negative local interactions

P= Preliminary Data

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

Q1 2024 P	Q1 2025 P
55.6% Too expensive 44.8% Flight too long 38.9% Want to go someplace new 20.9% Poor value 19.3% Too crowded/ congested 14.4% Five years is too soon 11.3% Too commercialized/ overdeveloped	41.5% High cost of travel 29.1% Preference for other destinations 24.9% Long travel distance 10.2% Health and personal limitations/ age

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS JAPAN

Q1 2024* P	Q1 2025** P
70.8% Too expensive 39.3% Want to go someplace new 36.6% Five years is too soon 20.9% Other financial obligations	34.2% High cost of travel 15.0% Financial constraints 15.0% Exchange rate

\*Caution small base (n=35 respondents) in Q1 2024.

\*\*Caution small base (n=21 respondents) in Q1 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

Q1 2024 P	Q1 2025 P
64.9% Too expensive 37.4% Want to go someplace new 36.0% Flight too long 22.0% Five years is too soon 20.7% Poor value 12.4% Other financial obligations 10.7% Too crowded/ congested	45.2% Political climate 30.2% High cost of travel 12.0% Long travel distance 11.7% Travel restrictions or relations

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q1 2024 P	Q1 2025* P
52.5% Too expensive 40.5% Want to go someplace new 30.0% Poor value 25.0% Too commercialized/ overdeveloped 17.8% No compelling reason to return 17.0% Flight too long 15.0% Five years is too soon 15.0% Too crowded/ congested	48.4% High cost of travel 18.7% Preference for other destinations 13.1% Homeless and urban issues

\*Caution small base (n=28 respondents) in Q1 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS KOREA

Q1 2024* P	Q1 2025** P
58.2% Too expensive 31.7% No compelling reason to return 28.0% Poor value 22.8% Flight too long 21.2% Want to go someplace new 12.2% Five years is too soon 10.6% Dirty/ filthy	56.9% High cost of travel 16.5% Preference for other destinations

\*Caution small base (n=18 respondents) in Q1 2024.

\*\*Caution small base (n=19 respondents) in Q1 2025.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CHINA

Q1 2024* P	Q1 2025** P
100% Too crowded/ congested 69.7% No compelling reason to return 69.7% Too expensive 69.7% Poor value 60.6% Flight too long 30.3% Five years is too soon 30.3% Want to go someplace new	100% No reason in particular

\*Caution small base (n=1 respondents) in Q1 2024.

\*\*Caution small base (n=1 respondents) in Q1 2025.

P= Preliminary Data



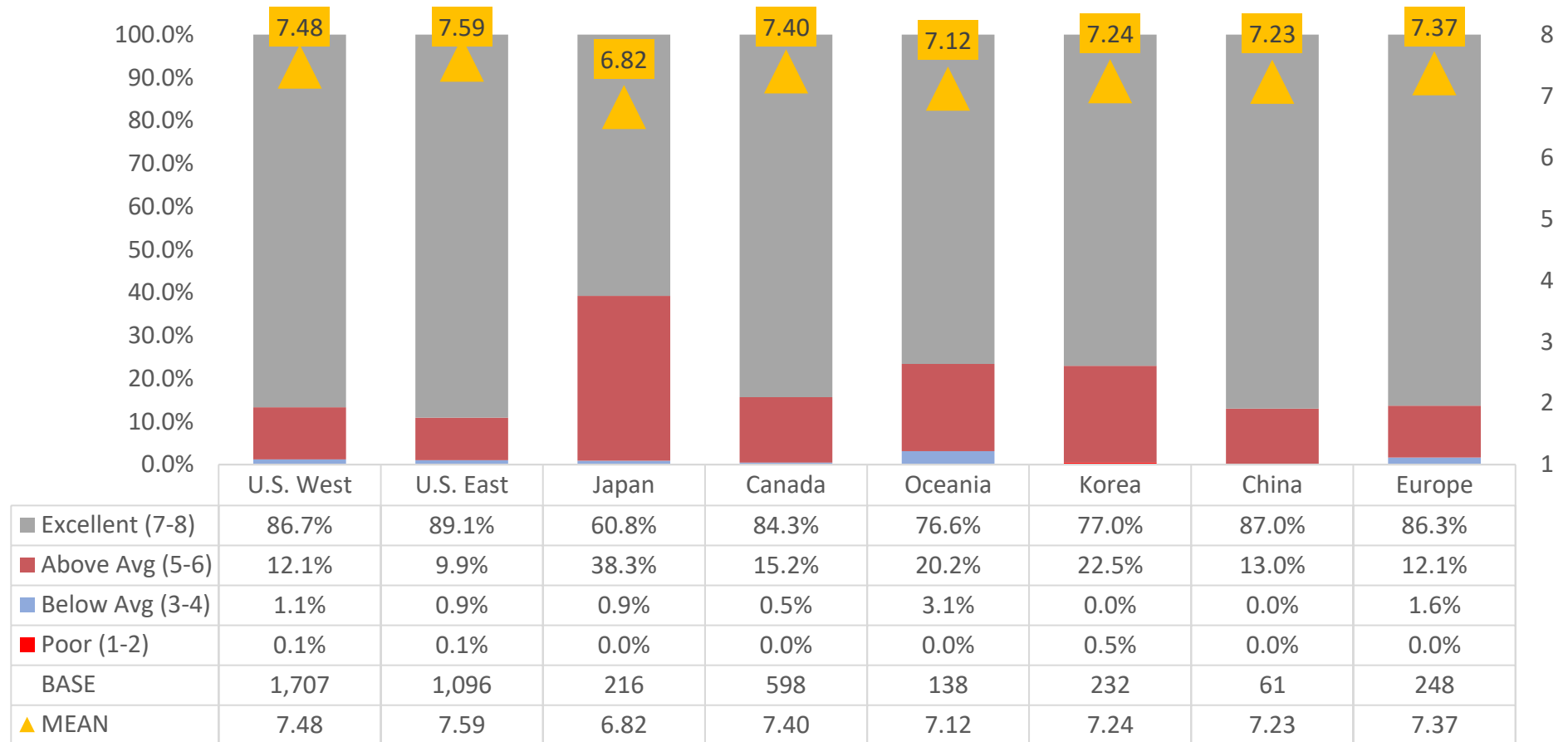
# UNLIKELY TO RETURN - TOP REASONS EUROPE

Q1 2024 P	Q1 2025 P
58.5% Flight too long 57.6% Too expensive 32.3% Want to go someplace new 17.8% Poor value 16.8% Five years is too soon 12.1% Too commercialized/ overdeveloped 10.7% No compelling reason to return	44.7% Long travel distance 40.0% High cost of travel 15.2% Preference for other destinations

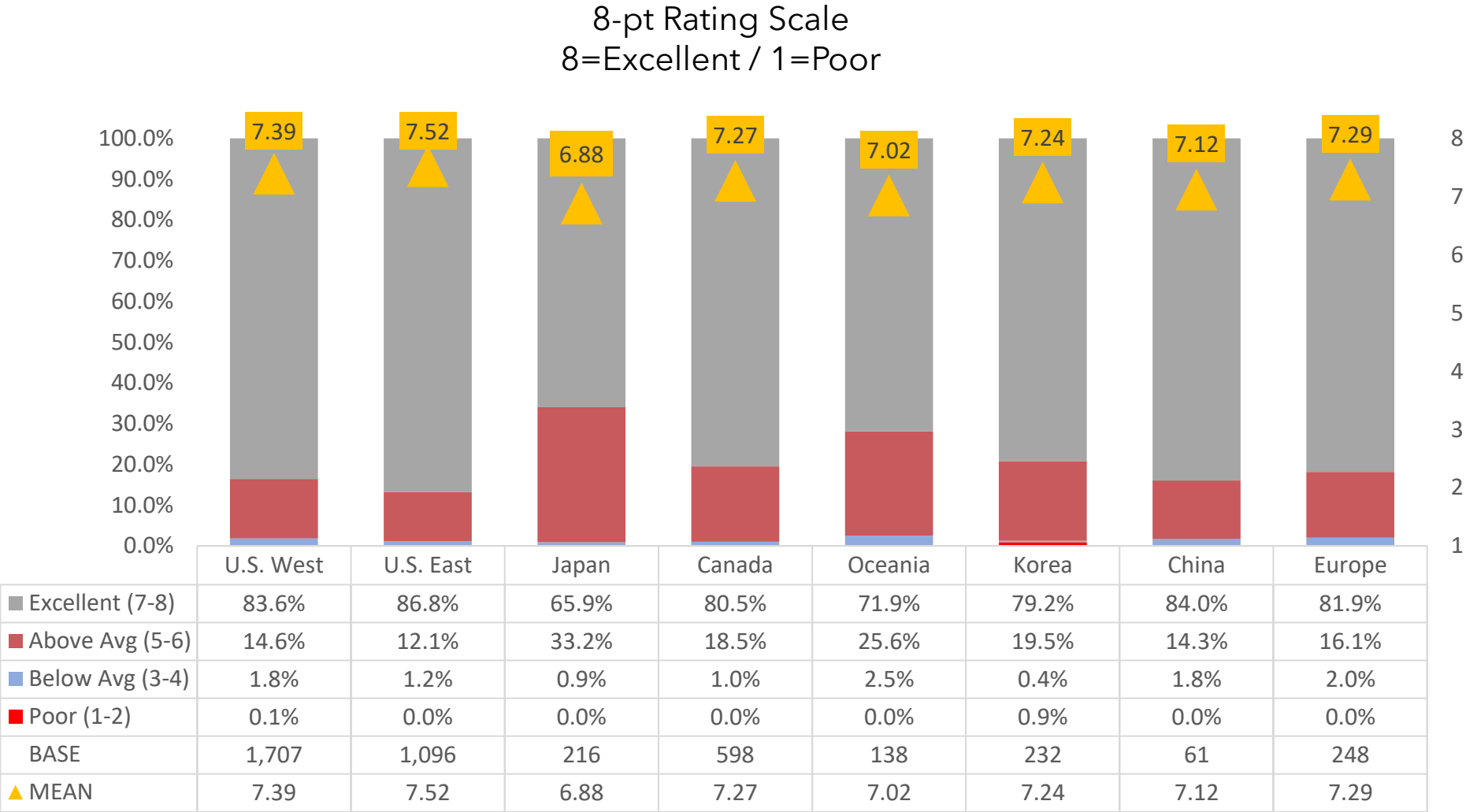
P= Preliminary Data

# OFFERING A VARIETY OF EXPERIENCES

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

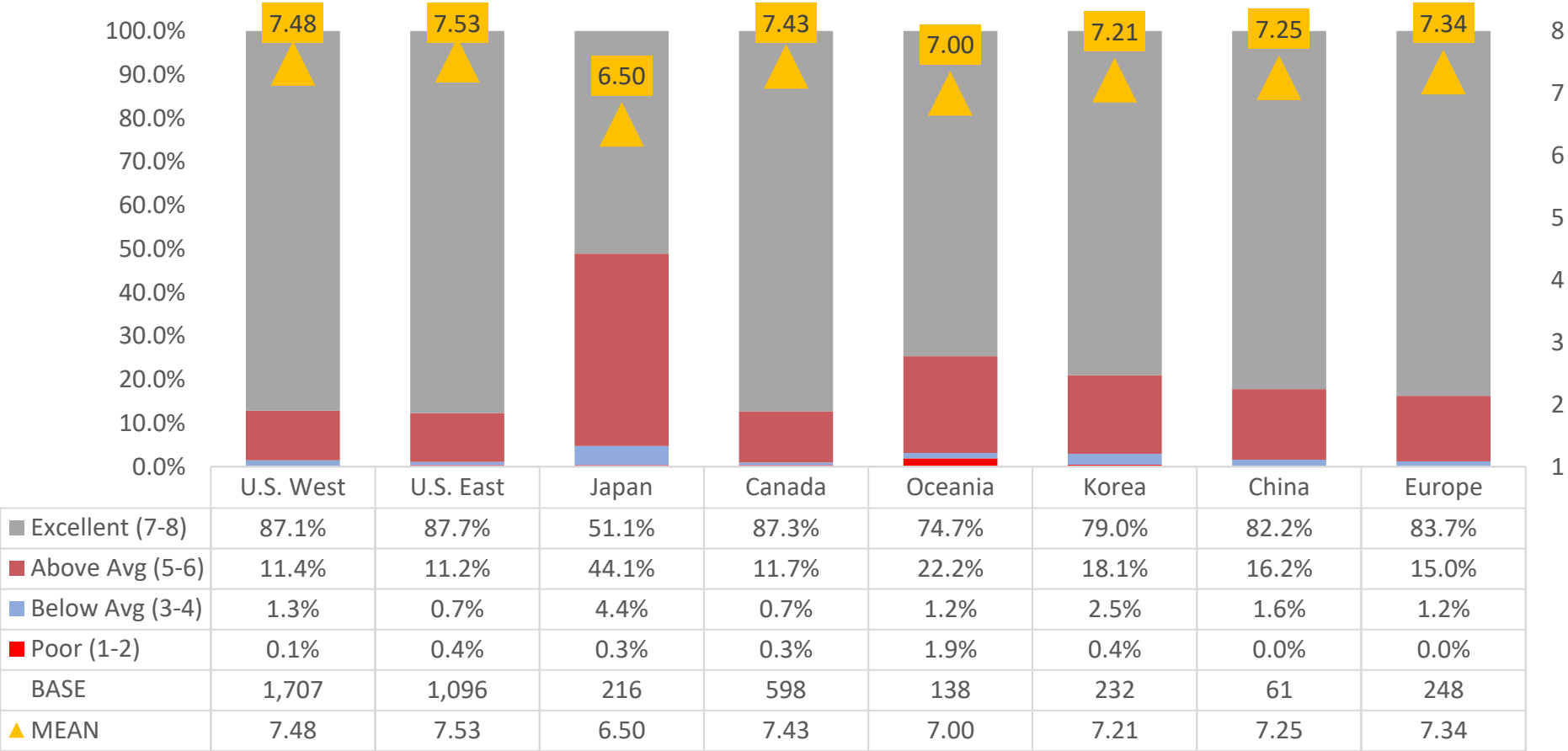


# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES



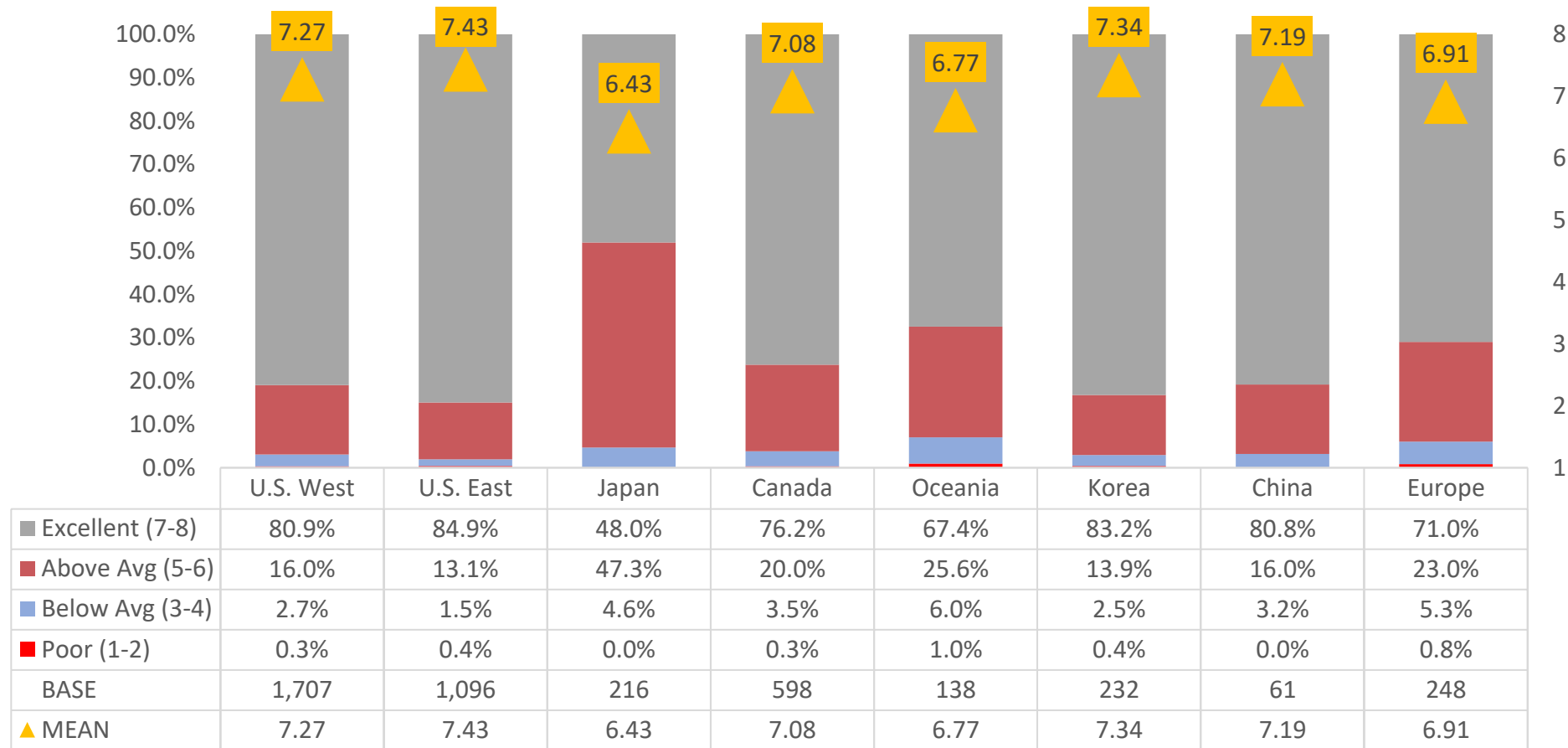
# SAFE AND SECURE DESTINATION

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



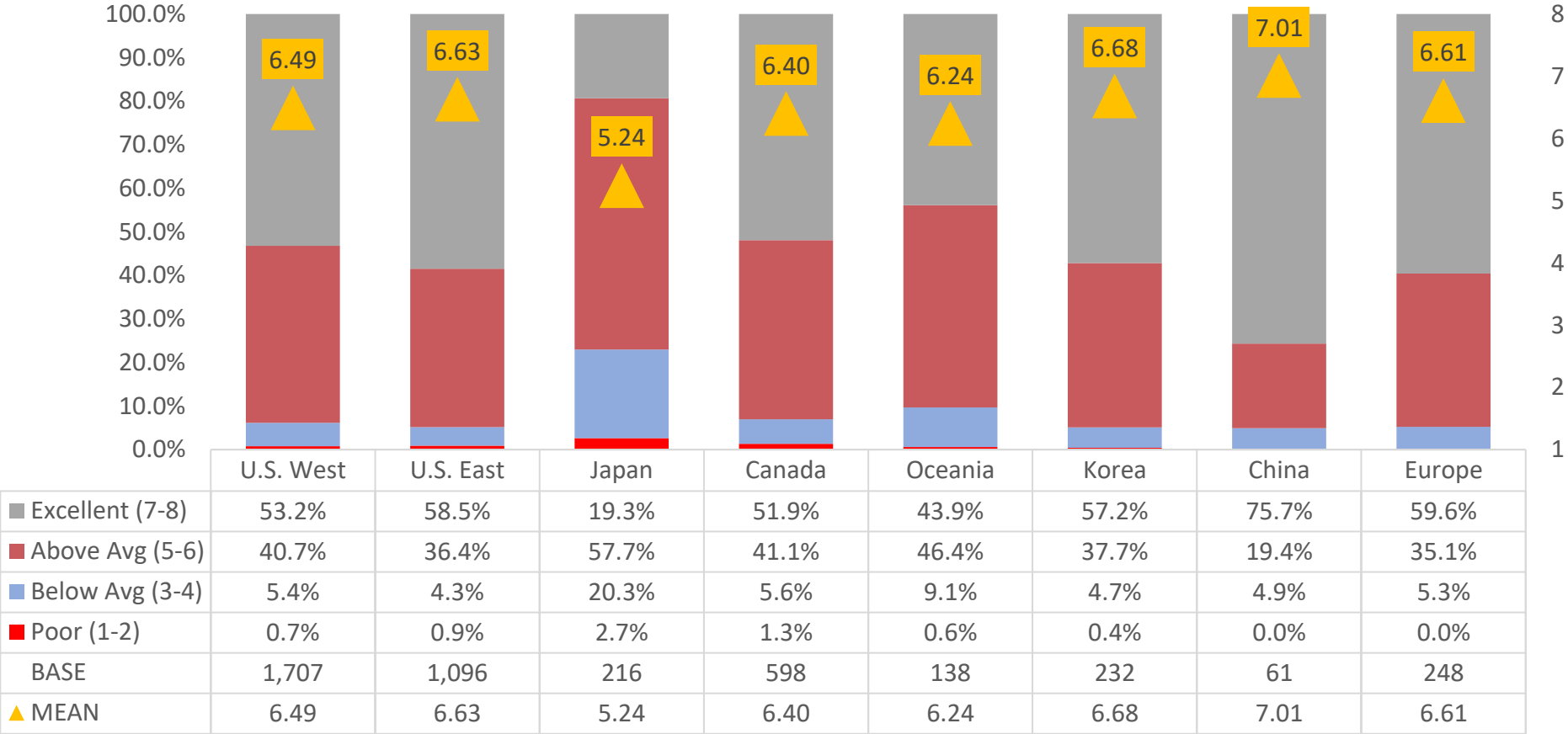
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



# VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



# Section 2 – Activities

# ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	97.0%	98.5%	95.9%	98.8%	96.4%	99.5%	96.6%	99.6%
<b>On own (self-guided)/ driving around island</b>	83.5%	81.9%	75.9%	84.4%	62.8%	85.2%	61.7%	81.4%
<b>Helicopter ride/ airplane tour</b>	2.3%	6.6%	0.6%	5.6%	2.3%	5.2%	1.6%	10.1%
<b>Boat tour/ submarine ride/ whale watching</b>	29.4%	38.3%	14.2%	33.2%	20.3%	33.6%	43.5%	40.9%
<b>Visit towns/ communities</b>	53.2%	59.4%	41.8%	61.9%	43.5%	40.8%	26.8%	56.7%
<b>Private limousine/ van tour/ tour bus</b>	6.1%	13.5%	10.5%	10.8%	28.9%	5.7%	20.2%	12.3%
<b>Scenic views/ natural landmarks</b>	64.4%	74.9%	26.8%	75.7%	67.7%	65.9%	71.4%	69.7%
<b>Movie/ TV/ film location tours</b>	4.1%	6.9%	4.2%	6.1%	12.6%	16.6%	16.6%	13.5%



# ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	96.6%	96.1%	92.9%	97.4%	95.4%	99.1%	96.8%	95.8%
<b>Beach/ sunbathing</b>	82.8%	81.3%	72.2%	87.7%	77.6%	80.3%	83.5%	82.7%
<b>Bodyboarding</b>	10.8%	6.5%	0.0%	10.9%	12.6%	4.4%	8.1%	5.0%
<b>Standup paddle boarding</b>	4.5%	3.8%	1.1%	4.3%	6.3%	5.3%	3.4%	2.1%
<b>Surfing</b>	6.0%	5.8%	5.0%	7.3%	9.7%	9.0%	6.4%	11.0%
<b>Canoe paddling</b>	1.8%	1.2%	0.6%	2.2%	0.0%	4.4%	0.0%	2.1%
<b>Kayaking</b>	3.8%	3.4%	2.0%	3.6%	1.3%	3.9%	1.6%	4.2%
<b>Swimming in the ocean</b>	65.3%	58.2%	30.7%	73.9%	67.6%	57.4%	37.9%	66.5%
<b>Snorkeling</b>	40.1%	36.0%	9.9%	45.3%	35.5%	59.1%	29.9%	37.1%
<b>Freediving</b>	1.6%	1.3%	1.1%	2.2%	0.6%	2.2%	9.8%	0.4%
<b>Windsurfing/ kitesurfing</b>	0.1%	0.1%	0.0%	0.7%	0.0%	0.4%	3.2%	0.0%
<b>Jet skiing/ parasailing</b>	0.7%	0.6%	4.0%	1.4%	1.0%	0.8%	0.0%	0.0%
<b>Scuba diving</b>	2.7%	1.6%	1.8%	2.5%	1.7%	0.9%	1.8%	2.1%
<b>Fishing</b>	2.2%	2.4%	1.1%	1.9%	1.9%	0.0%	3.6%	0.4%
<b>Golf</b>	7.3%	7.0%	6.0%	11.6%	3.6%	7.2%	0.0%	2.1%
<b>Running/ jogging/ fitness/ walking</b>	31.3%	31.7%	15.0%	41.6%	27.9%	15.9%	35.1%	26.4%

# ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	96.6%	96.1%	92.9%	97.4%	95.4%	99.1%	96.8%	95.8%
<b>Cycling</b>	2.4%	2.2%	5.0%	4.4%	1.9%	3.0%	3.4%	4.2%
<b>Spa</b>	9.6%	11.2%	3.5%	6.5%	6.5%	6.7%	5.0%	5.9%
<b>Hiking</b>	39.6%	46.0%	19.9%	43.1%	17.5%	27.7%	54.9%	42.3%
<b>Backpacking/ camping</b>	1.1%	1.3%	0.3%	2.1%	0.0%	3.0%	6.4%	3.4%
<b>Agritourism</b>	17.7%	21.5%	9.3%	15.5%	14.9%	25.7%	18.3%	14.7%
<b>Sports event or tournament</b>	1.8%	1.5%	2.2%	3.2%	6.3%	0.9%	1.8%	2.5%
<b>Parks/ botanical gardens</b>	35.2%	40.9%	24.5%	39.4%	30.0%	26.2%	53.5%	47.2%
<b>Waterparks</b>	1.2%	1.1%	2.8%	2.7%	0.0%	3.1%	0.0%	2.2%
<b>Mountain tubing/ waterfall rappel</b>	1.7%	2.1%	0.0%	2.0%	0.6%	1.3%	0.0%	5.5%
<b>Zip-lining</b>	2.9%	2.9%	0.0%	1.1%	1.9%	0.4%	3.2%	0.4%
<b>Skydiving</b>	0.3%	0.8%	1.1%	0.5%	0.0%	2.2%	5.0%	0.4%
<b>All-terrain vehicle (ATV)</b>	2.2%	3.2%	0.9%	2.3%	8.9%	8.2%	10.0%	2.9%
<b>Horseback riding</b>	1.3%	1.5%	2.6%	0.9%	0.0%	0.5%	3.4%	0.0%
<b>Tennis/ pickleball</b>	2.4%	2.0%	0.0%	6.1%	0.6%	2.8%	3.4%	0.9%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	98.4%	98.2%	96.7%	98.1%	99.4%	99.2%	98.4%	98.8%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.7%	24.0%	15.1%	19.4%	31.2%	38.8%	68.3%	28.6%
<b>Live music/ stage show</b>	27.2%	37.2%	24.0%	34.7%	32.0%	15.3%	20.0%	28.4%
<b>Nightclub/ dancing/ bar/ karaoke</b>	7.3%	7.1%	5.1%	7.4%	13.1%	4.4%	8.2%	11.0%
<b>Fine dining</b>	50.0%	56.3%	42.9%	48.9%	38.7%	47.5%	54.9%	38.8%
<b>Family restaurant</b>	72.2%	66.4%	32.1%	74.3%	77.1%	47.9%	36.7%	49.9%
<b>Fast food</b>	33.1%	33.5%	53.1%	45.9%	65.2%	65.0%	50.3%	46.8%
<b>Food truck</b>	42.1%	43.3%	23.3%	43.6%	41.4%	60.9%	40.2%	48.1%
<b>Café/ coffee house</b>	52.3%	49.7%	55.8%	54.3%	60.9%	71.5%	48.0%	64.6%
<b>Ethnic dining</b>	23.0%	26.6%	5.3%	19.1%	5.6%	24.0%	28.1%	14.7%
<b>Farm-to-table cuisine</b>	16.3%	18.3%	11.9%	12.3%	2.6%	2.7%	15.0%	6.7%
<b>Prepared own meal</b>	43.1%	33.9%	19.9%	57.2%	23.5%	18.2%	12.3%	39.5%

# ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	96.1%	96.6%	99.0%	97.6%	99.4%	99.2%	96.6%	97.5%
<b>Malls/ department stores</b>	46.3%	43.8%	83.3%	60.5%	84.5%	81.9%	71.7%	65.9%
<b>Designer boutiques</b>	20.1%	24.3%	17.2%	23.1%	24.1%	6.2%	18.3%	22.5%
<b>Hotel/ resort stores</b>	40.4%	46.7%	32.1%	40.5%	52.8%	46.5%	54.8%	41.8%
<b>Swap meet/ flea market</b>	16.9%	19.1%	6.5%	19.5%	18.0%	8.7%	5.2%	16.9%
<b>Discount/ outlet stores</b>	13.8%	14.3%	26.5%	23.2%	44.0%	63.6%	23.8%	23.4%
<b>Supermarkets</b>	61.5%	54.7%	66.1%	65.9%	66.2%	61.4%	76.7%	75.5%
<b>Farmer's market</b>	31.9%	29.3%	13.7%	35.7%	17.5%	11.1%	10.0%	38.2%
<b>Convenience stores</b>	45.2%	49.1%	52.0%	55.0%	72.1%	62.8%	64.4%	34.0%
<b>Duty free stores</b>	5.0%	4.5%	21.7%	5.4%	12.2%	29.4%	29.7%	12.3%
<b>Hawai'i-made products</b>	48.8%	54.2%	9.7%	51.8%	43.3%	29.3%	66.9%	52.2%
<b>Local shops and artisans</b>	60.4%	67.2%	6.2%	62.8%	49.3%	19.0%	35.1%	54.7%
<b>Local fashion designers</b>	10.1%	12.1%	2.6%	14.1%	10.2%	2.2%	5.0%	16.3%

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	68.5%	77.1%	62.8%	69.3%	78.6%	67.1%	89.8%	80.0%
<b>Historic military sites and museums</b>	19.0%	29.6%	15.0%	21.3%	54.2%	29.4%	54.9%	39.4%
<b>Historic Hawaiian sites and museums</b>	36.8%	42.5%	17.0%	38.2%	43.4%	14.6%	38.5%	46.6%
<b>Other historical sites, museums, and homes</b>	13.4%	16.7%	8.4%	13.4%	12.4%	25.1%	14.9%	18.1%
<b>Art museums</b>	4.1%	4.2%	5.7%	5.2%	1.7%	10.1%	6.8%	6.7%
<b>Art galleries and exhibitions</b>	11.4%	13.2%	6.3%	12.6%	10.5%	4.4%	3.4%	10.4%
<b>Lū'au/ Polynesian show/ hula show</b>	20.8%	32.1%	12.1%	26.5%	26.2%	15.8%	13.2%	31.1%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.9%	6.5%	7.5%	6.2%	6.3%	5.3%	16.8%	5.9%
<b>Play/ concert/ theatre</b>	3.6%	3.2%	9.1%	4.3%	4.6%	3.6%	3.4%	6.3%
<b>Art/ craft fair</b>	11.1%	11.4%	3.8%	11.8%	2.3%	3.6%	8.2%	10.1%
<b>Festival/ event</b>	3.1%	3.7%	3.5%	4.5%	5.2%	2.6%	3.4%	4.2%

# ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	93.0%	93.5%	96.3%	94.1%	97.1%	98.3%	98.2%	95.8%
<b>Airport shuttle</b>	16.8%	18.1%	19.1%	18.8%	28.3%	14.5%	28.3%	21.2%
<b>Trolley</b>	2.0%	1.2%	43.5%	4.3%	18.6%	25.6%	11.6%	5.9%
<b>Public bus</b>	4.9%	4.8%	29.8%	11.3%	24.7%	10.9%	28.3%	22.0%
<b>Tour bus/ tour van</b>	6.7%	14.3%	21.7%	14.4%	36.8%	22.7%	16.5%	14.5%
<b>Taxi/ limo</b>	5.8%	8.2%	26.6%	15.1%	31.3%	28.6%	28.1%	19.0%
<b>Rental car</b>	73.2%	72.5%	18.1%	70.4%	38.7%	55.8%	41.9%	64.3%
<b>Ride share</b>	20.6%	24.9%	22.3%	24.8%	44.6%	23.9%	44.9%	21.4%
<b>Car share</b>	3.4%	2.8%	3.7%	4.3%	4.0%	2.2%	0.0%	2.5%
<b>Bicycle rental</b>	2.0%	2.6%	7.8%	3.4%	1.3%	1.7%	3.6%	3.4%

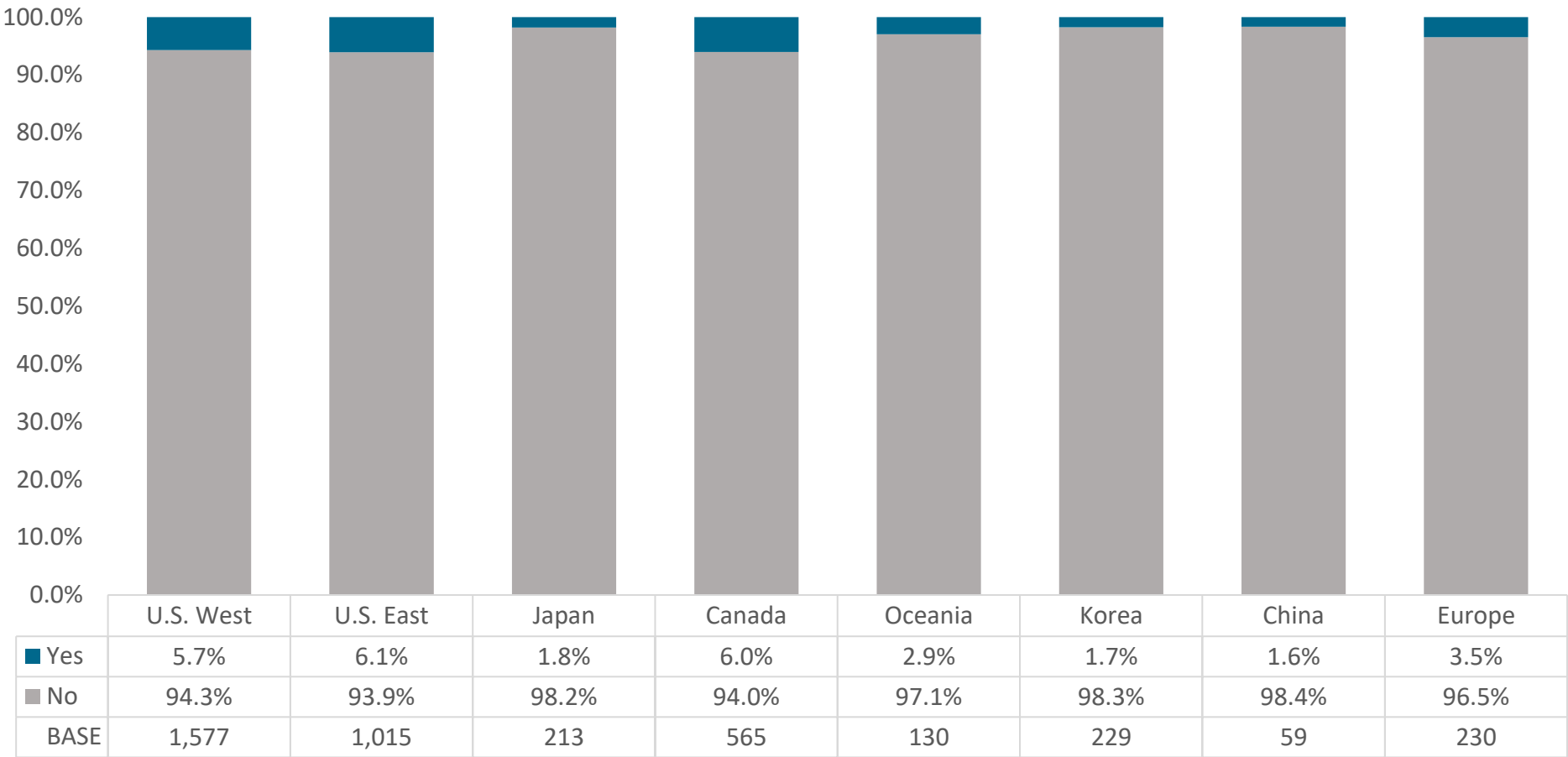
# ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	35.2%	34.7%	23.4%	29.3%	15.0%	19.5%	22.0%	20.5%
<b>Visit friends/ family</b>	27.1%	24.6%	14.4%	21.7%	10.5%	16.4%	17.0%	13.8%
<b>Volunteering/ giving back to the local community</b>	2.0%	2.1%	1.5%	2.5%	0.6%	1.7%	1.8%	1.3%
<b>Health and wellness activities</b>	9.9%	11.8%	8.1%	8.9%	3.9%	1.4%	5.0%	7.6%

# Section 3 – Travelers with Disabilities



# DISABLED TRAVELER - REQUIRED ASSISTANCE

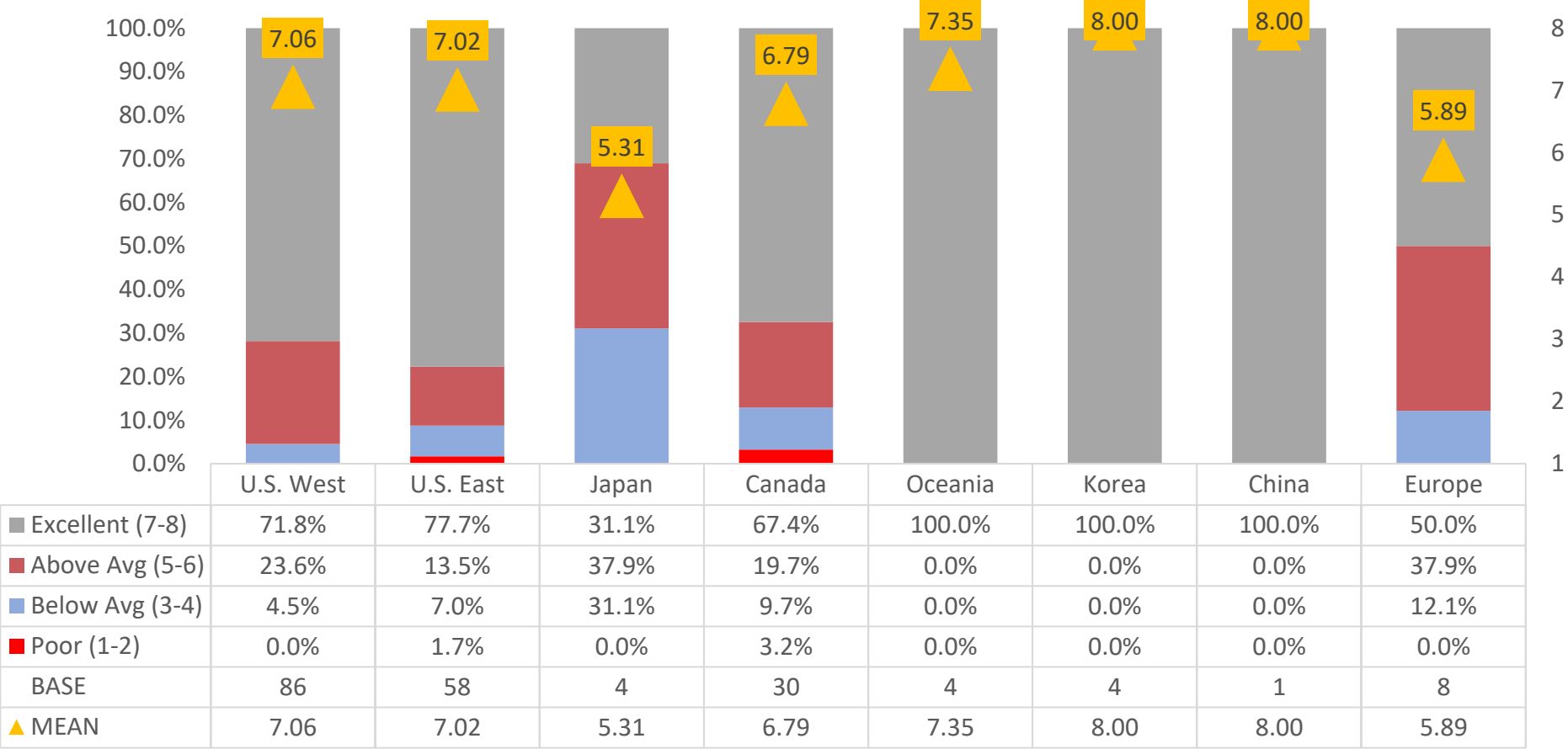


# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Mobility aid</b>	67.3%	65.5%	50.0%	73.4%	56.4%	24.4%	0.0%	50.0%
<b>Personal assistance</b>	26.0%	12.9%	0.0%	23.1%	43.6%	0.0%	0.0%	37.9%
<b>NA- No one needed assistance</b>	6.8%	13.4%	50.0%	2.9%	0.0%	51.3%	100.0%	12.9%
<b>Orientation and Mobility Assistance</b>	6.8%	8.0%	0.0%	14.6%	0.0%	0.0%	0.0%	0.0%
<b>Other</b>	3.6%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Ambulance/ hospital/ medical visit</b>	2.2%	6.3%	0.0%	0.0%	0.0%	24.4%	0.0%	0.0%
<b>Disabled parking/ placard</b>	4.3%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%
<b>Print material in alternate format</b>	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Lift equipped van</b>	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.1%
<b>Respiratory equipment</b>	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
<b>ASL Interpreter/ texting/ captioning</b>	0.0%	0.0%	0.0%	0.0%	0.0%	24.4%	0.0%	0.0%
<b>BASE</b>	90	62	4	34	4	4	1	8

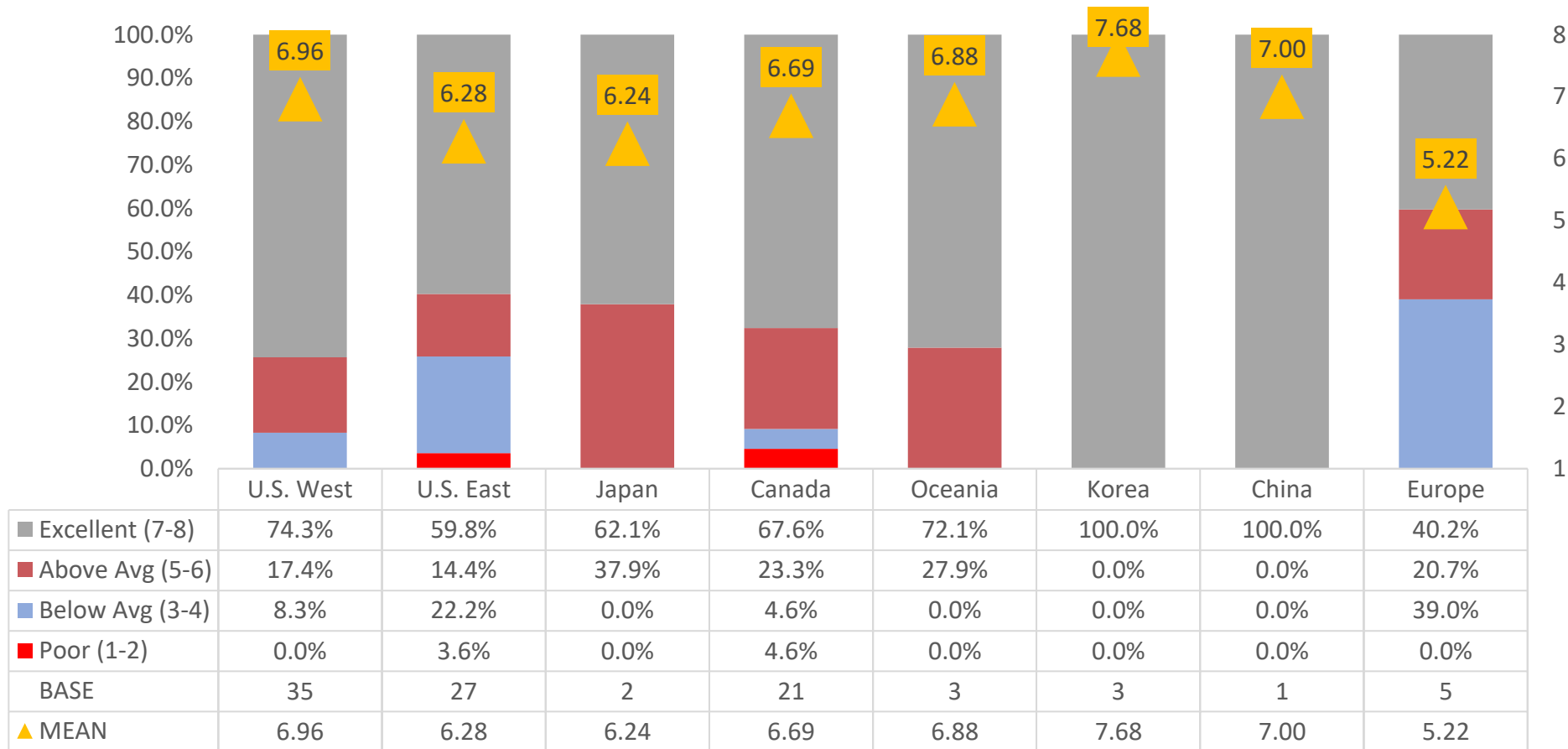
# OVERALL ACCESSIBILITY - AIRPORTS

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



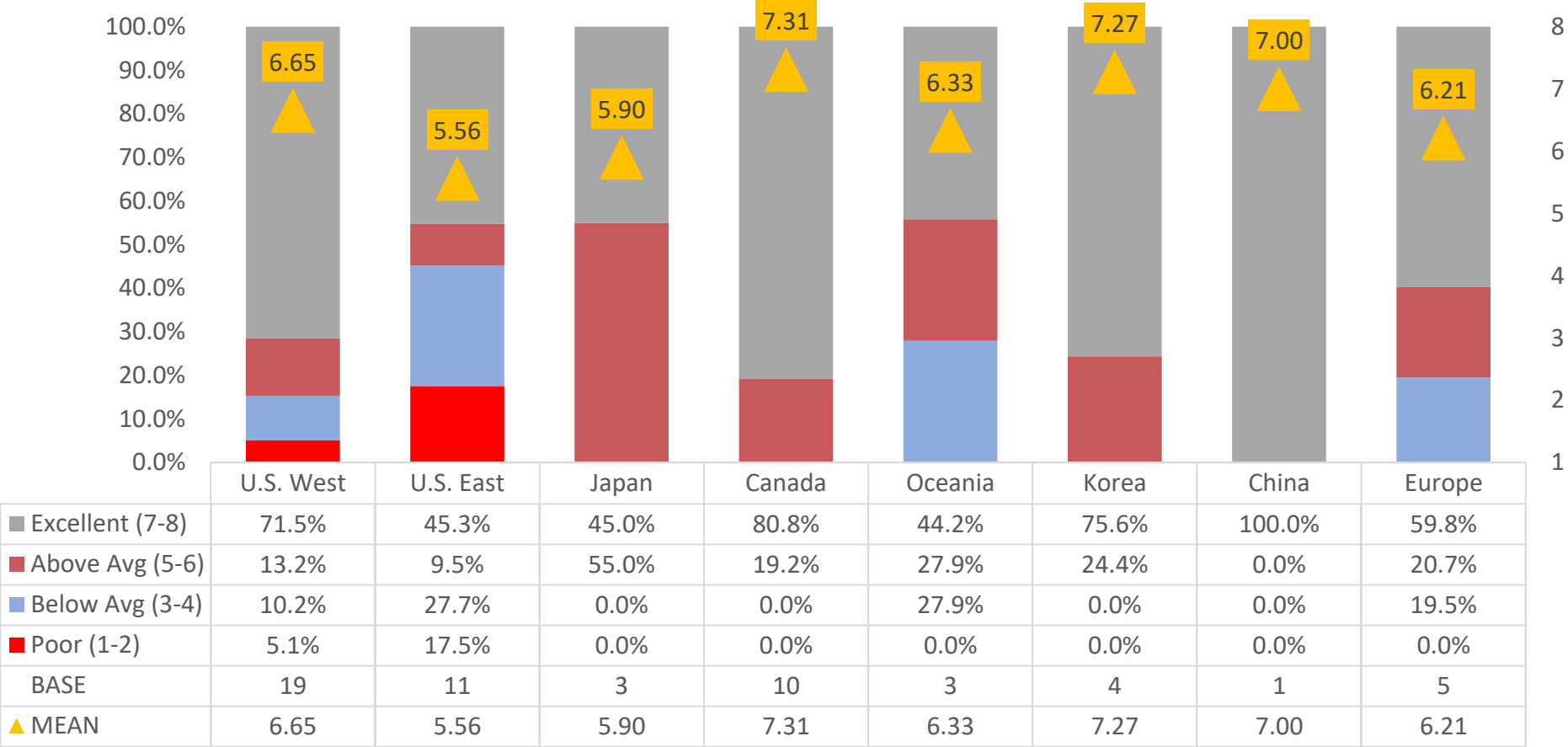
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



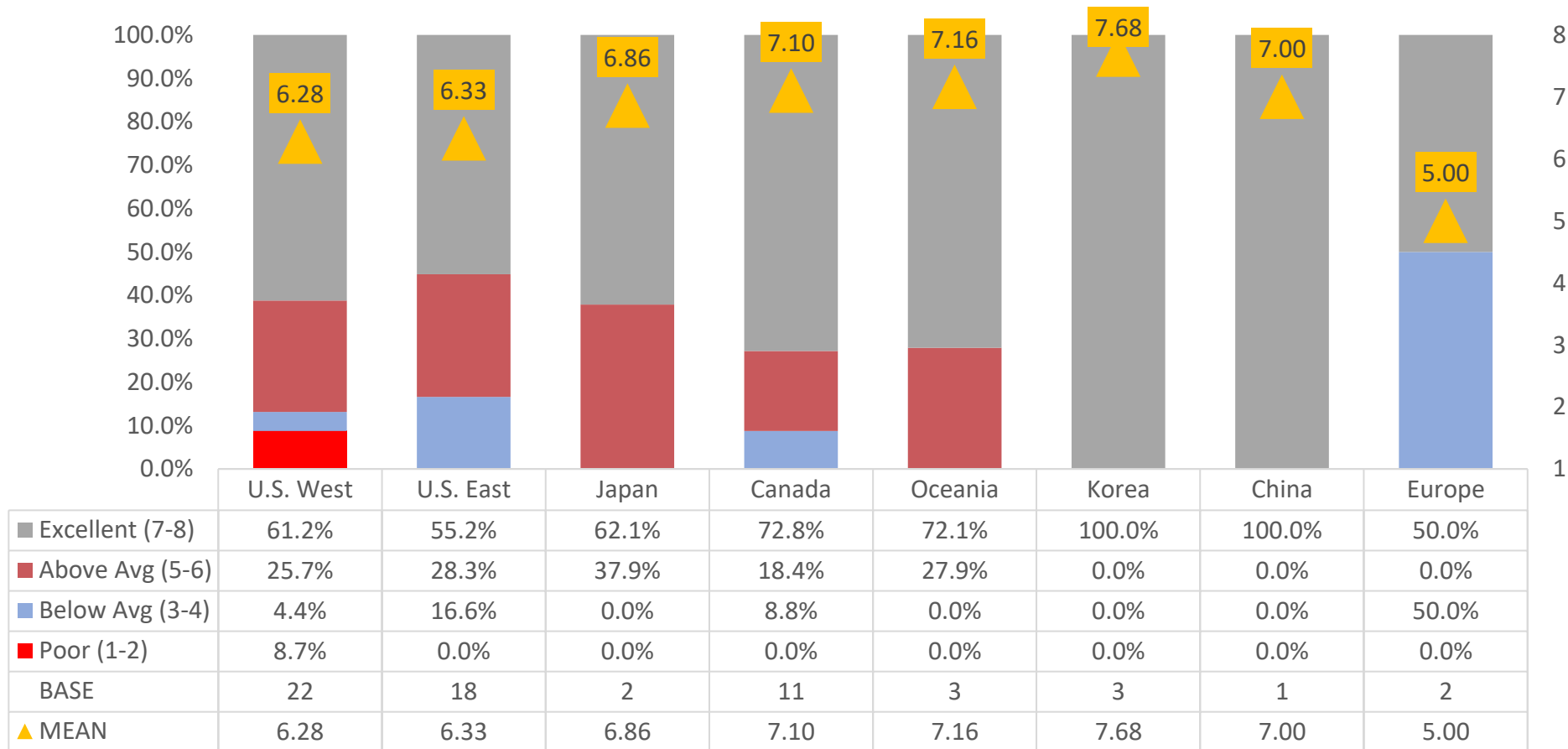
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



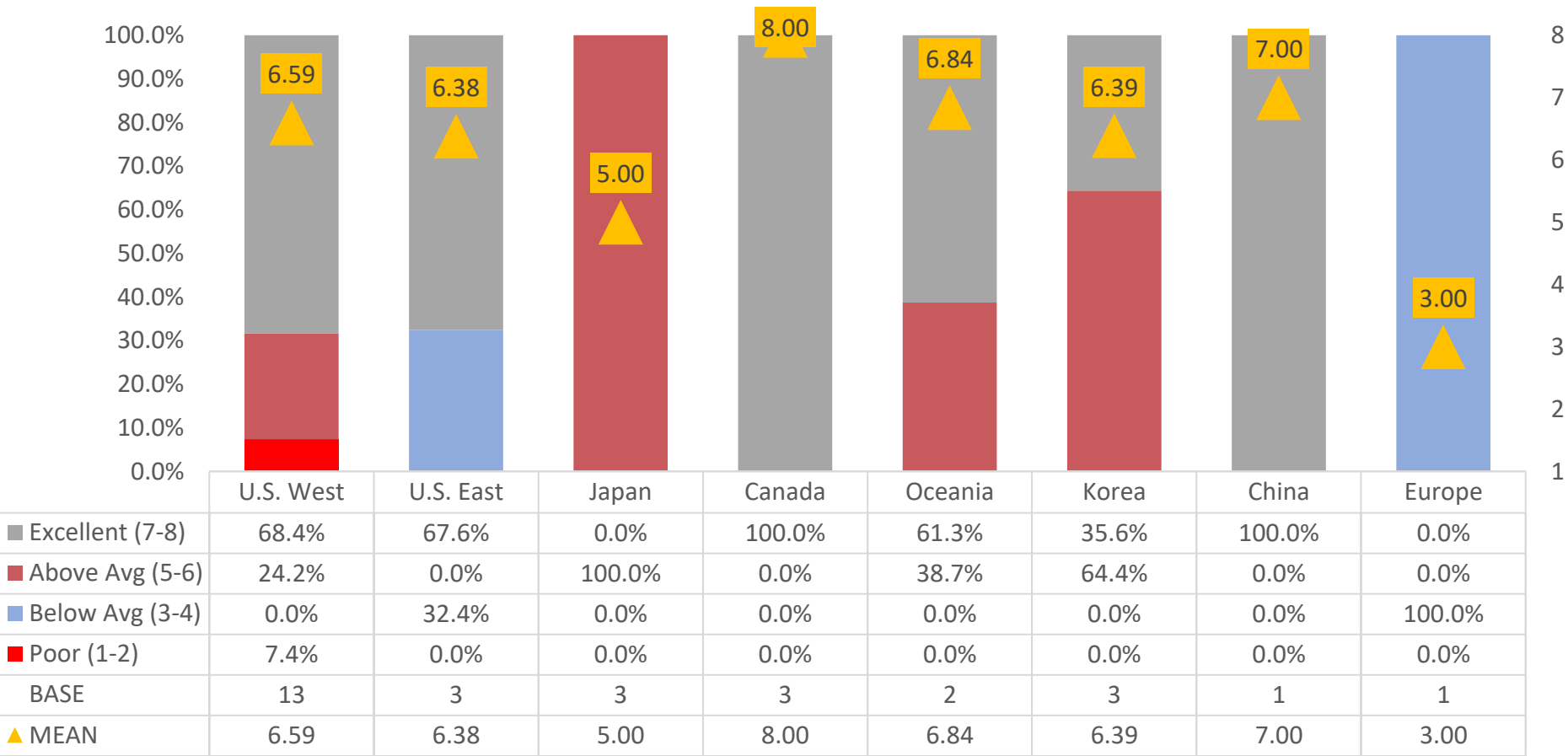
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



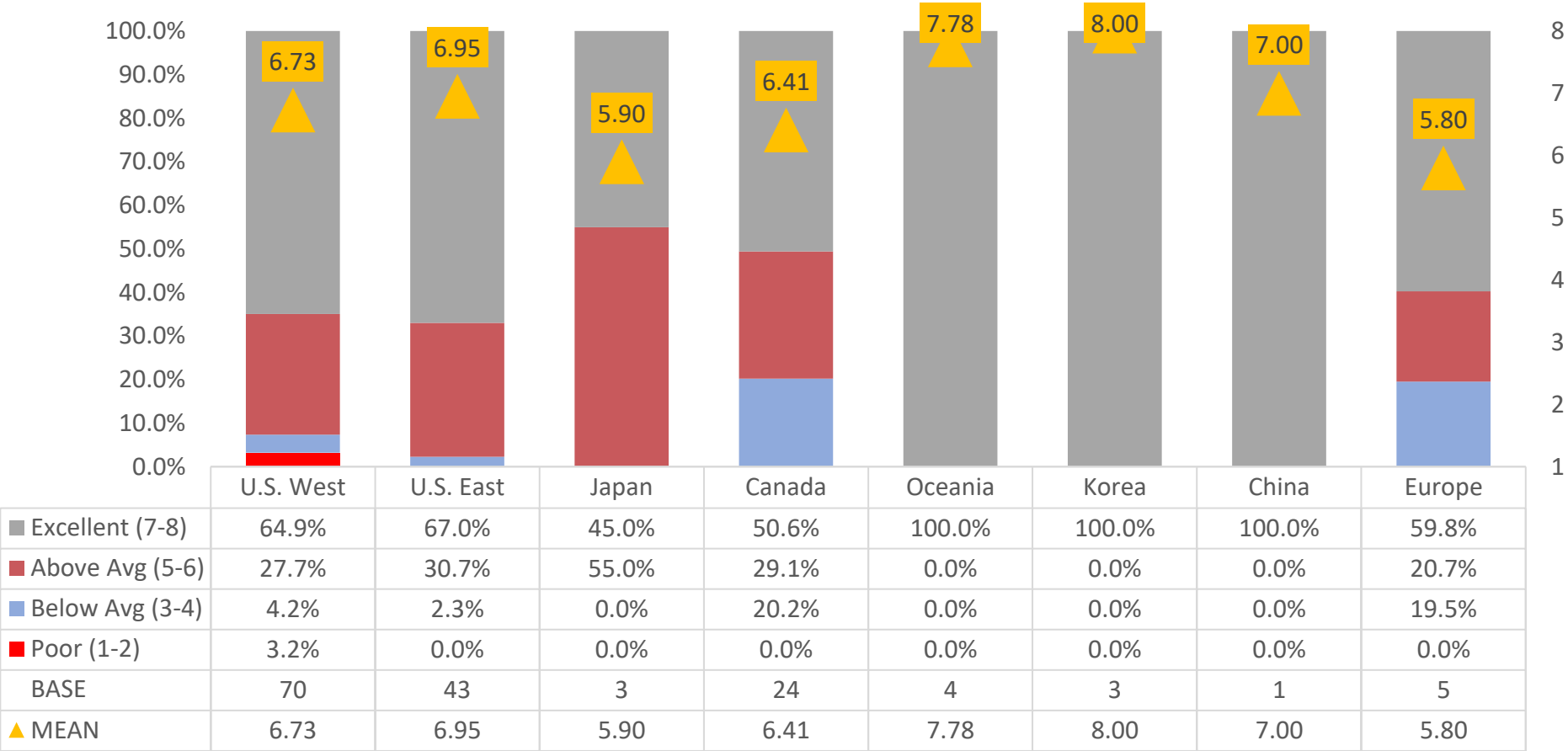
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



# OVERALL ACCESSIBILITY - HOTELS

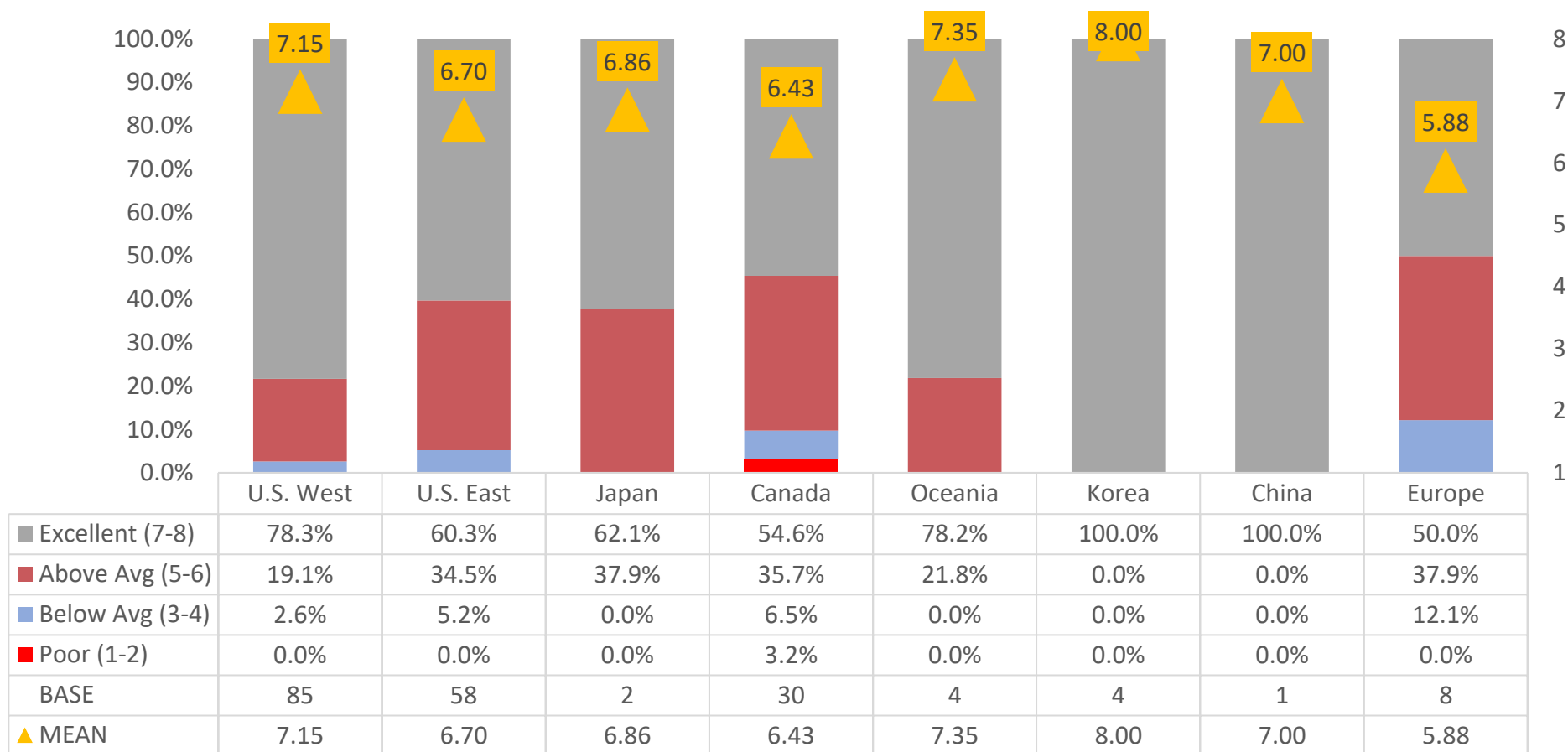
8-pt Rating Scale  
8=Excellent / 1=Poor





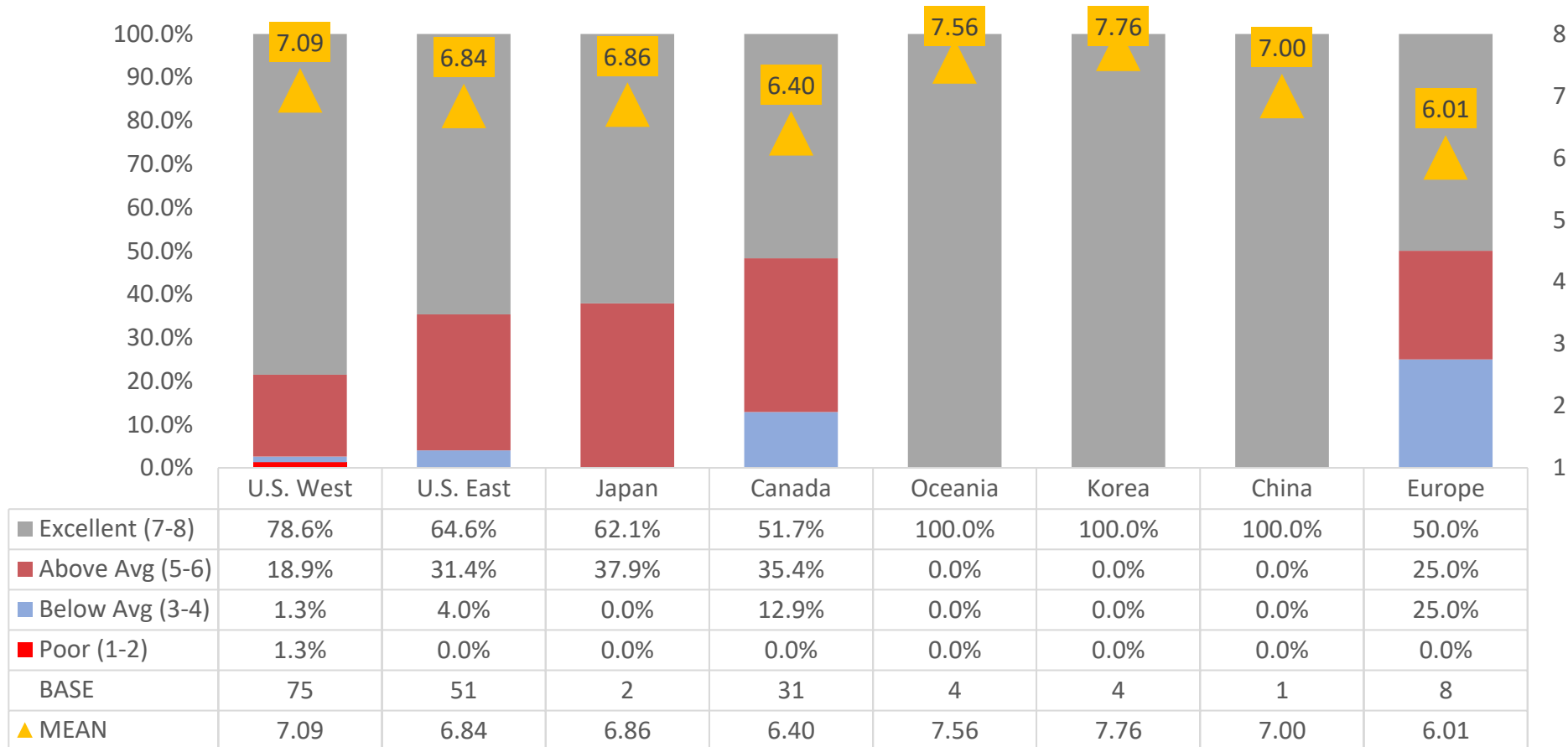
# OVERALL ACCESSIBILITY – RESTAURANTS

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



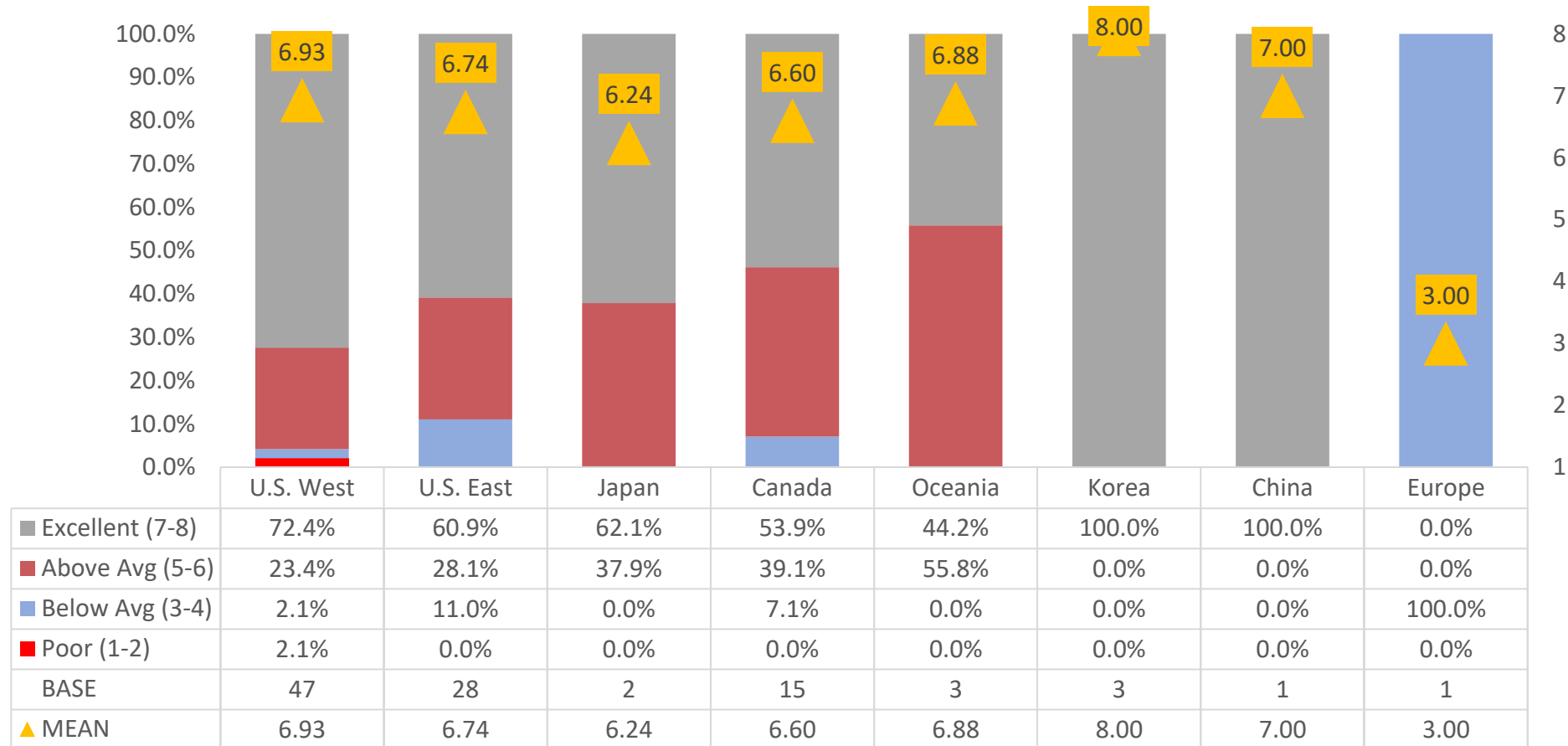
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



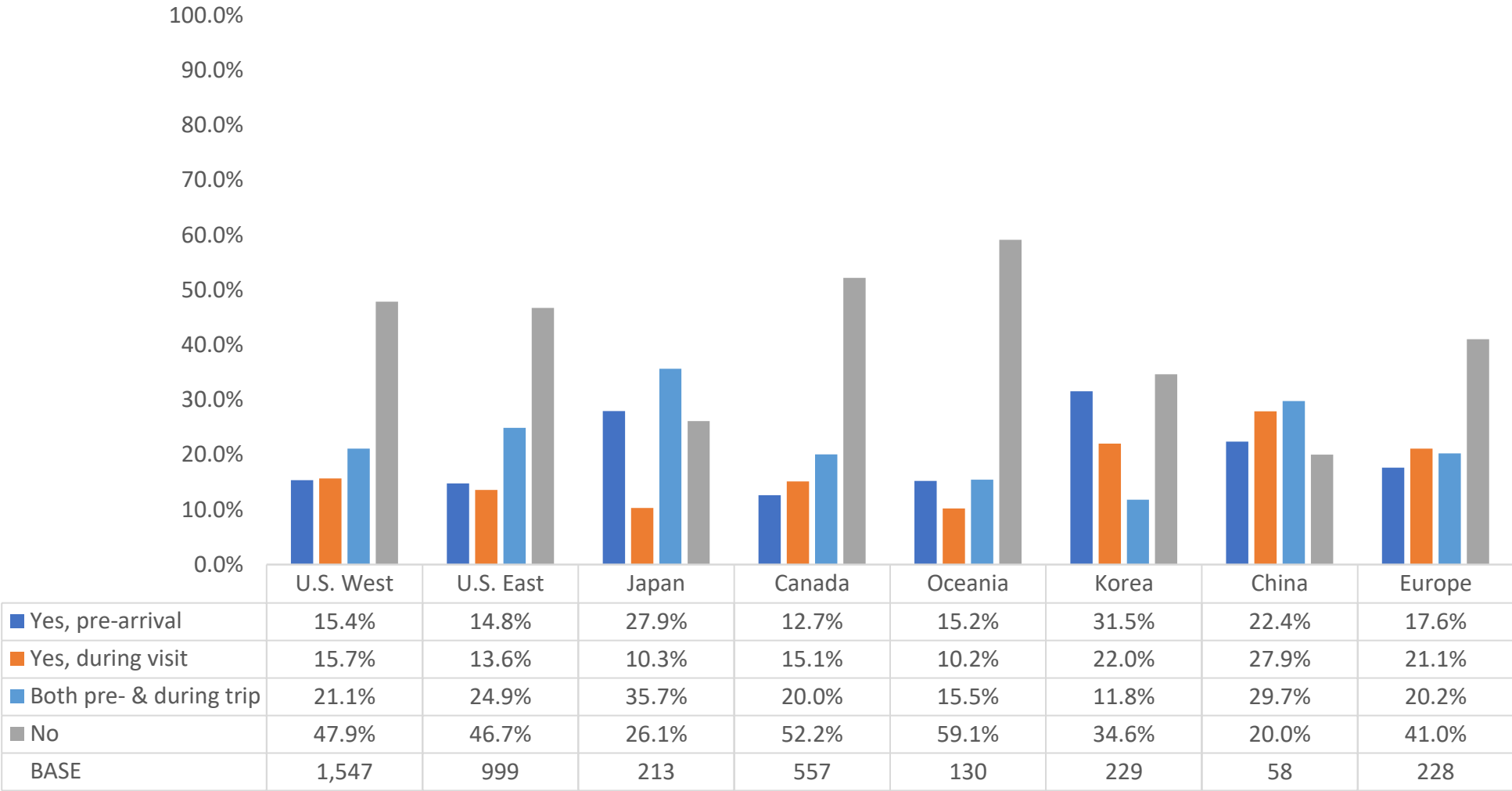
# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

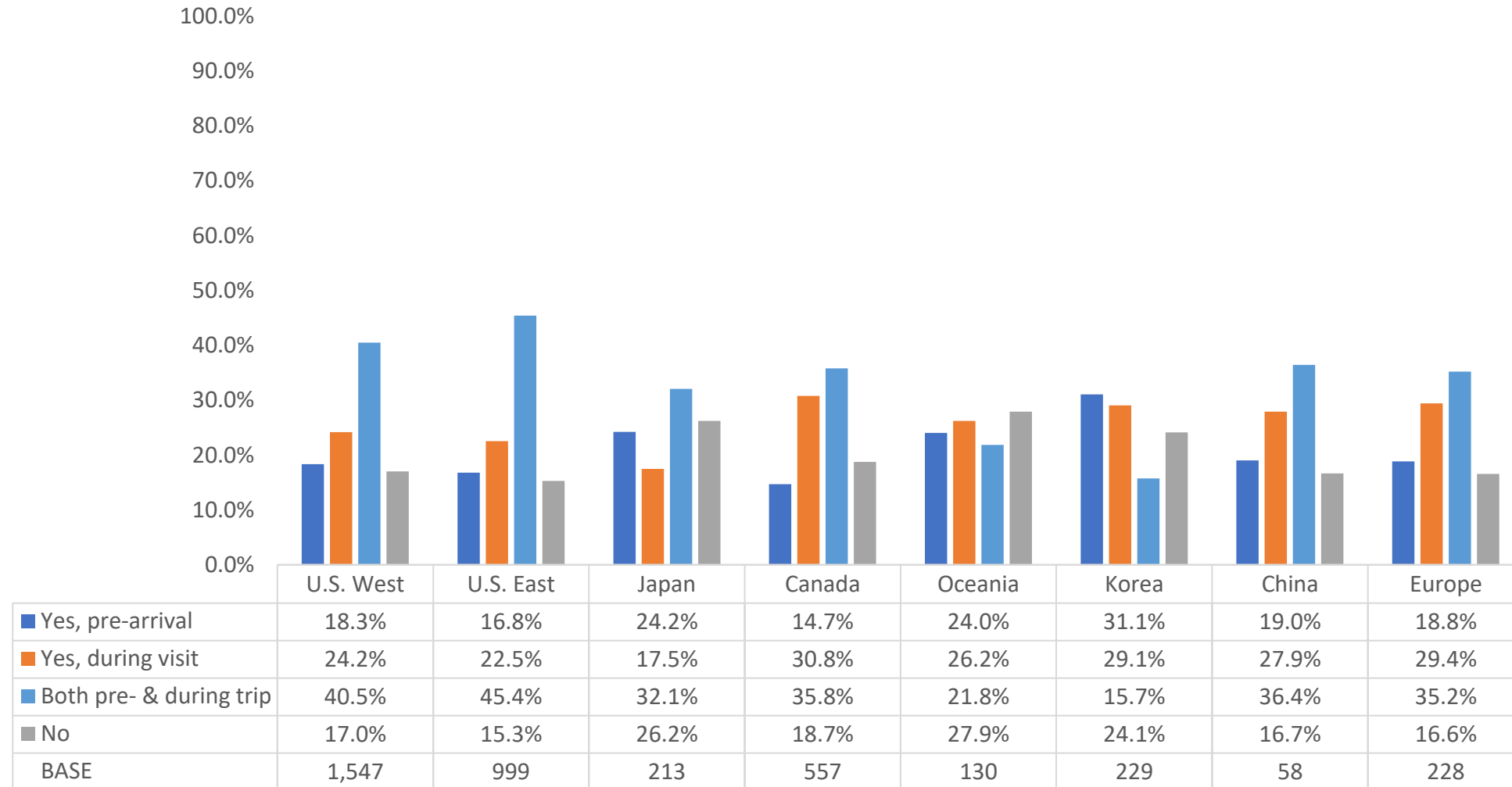


# Section 4 – Messaging

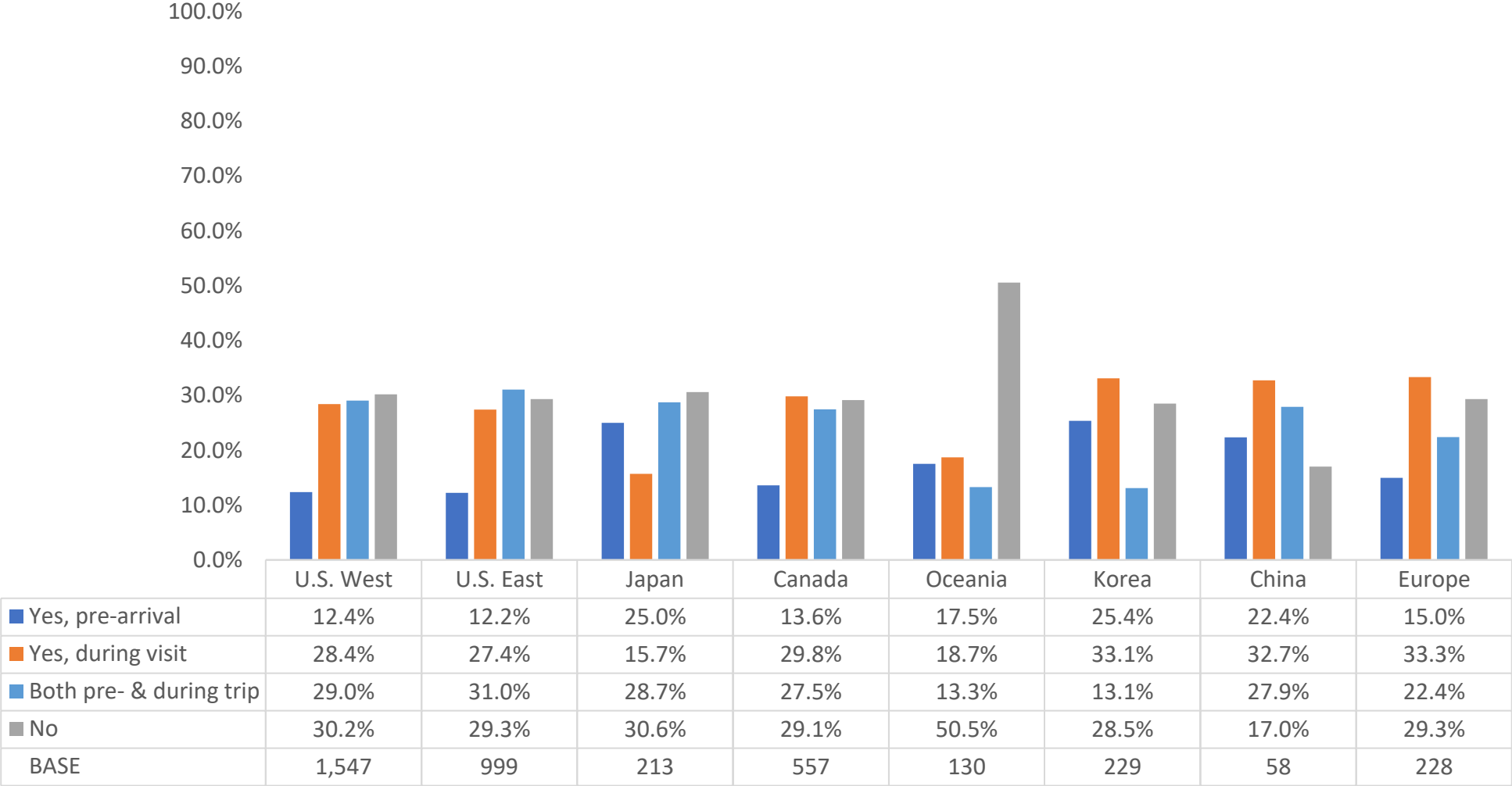
# SAFE AND RESPONSIBLE TRAVEL



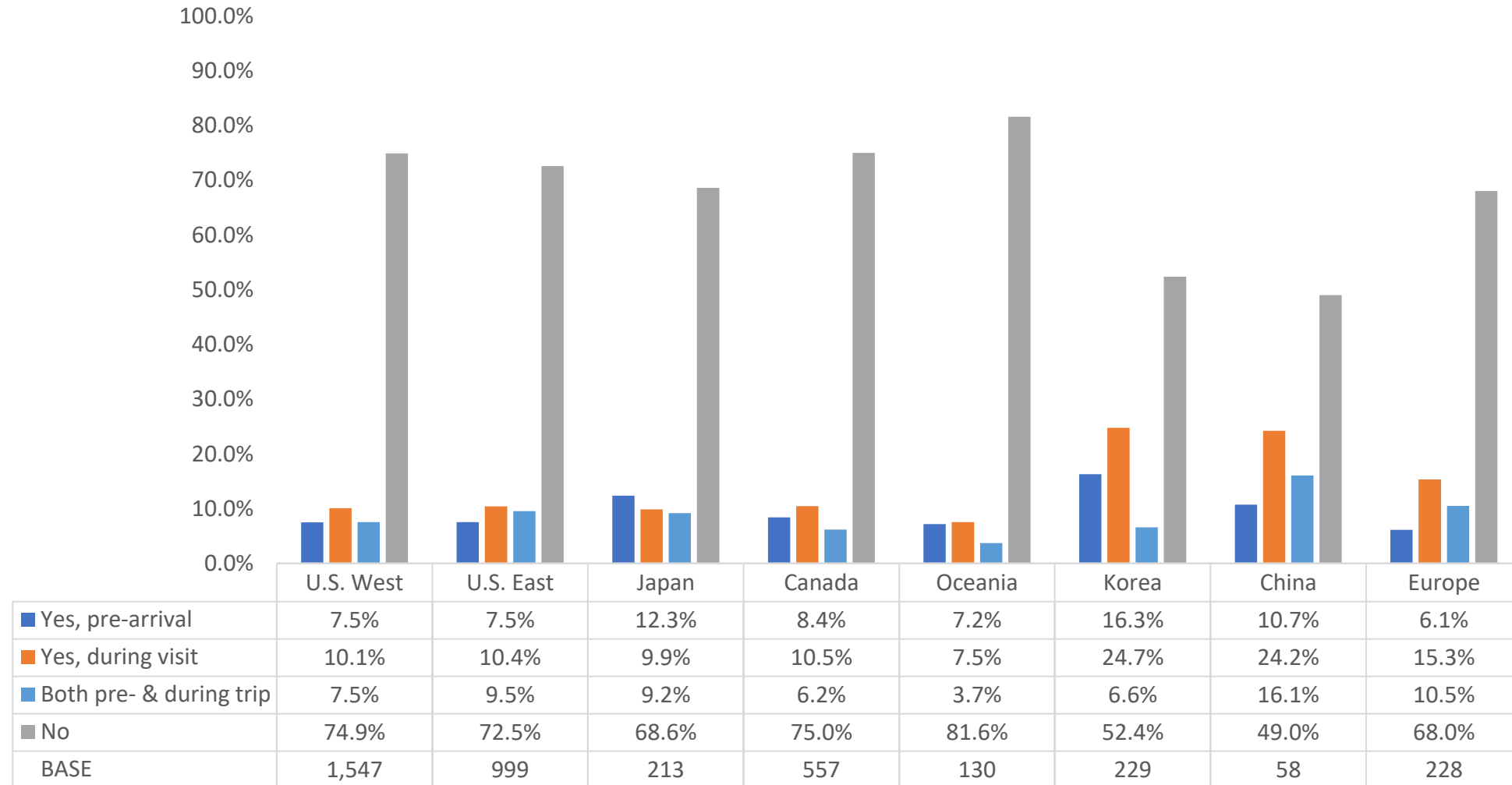
# CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE AND ENVIRONMENT



# OCEAN AND HIKING SAFETY

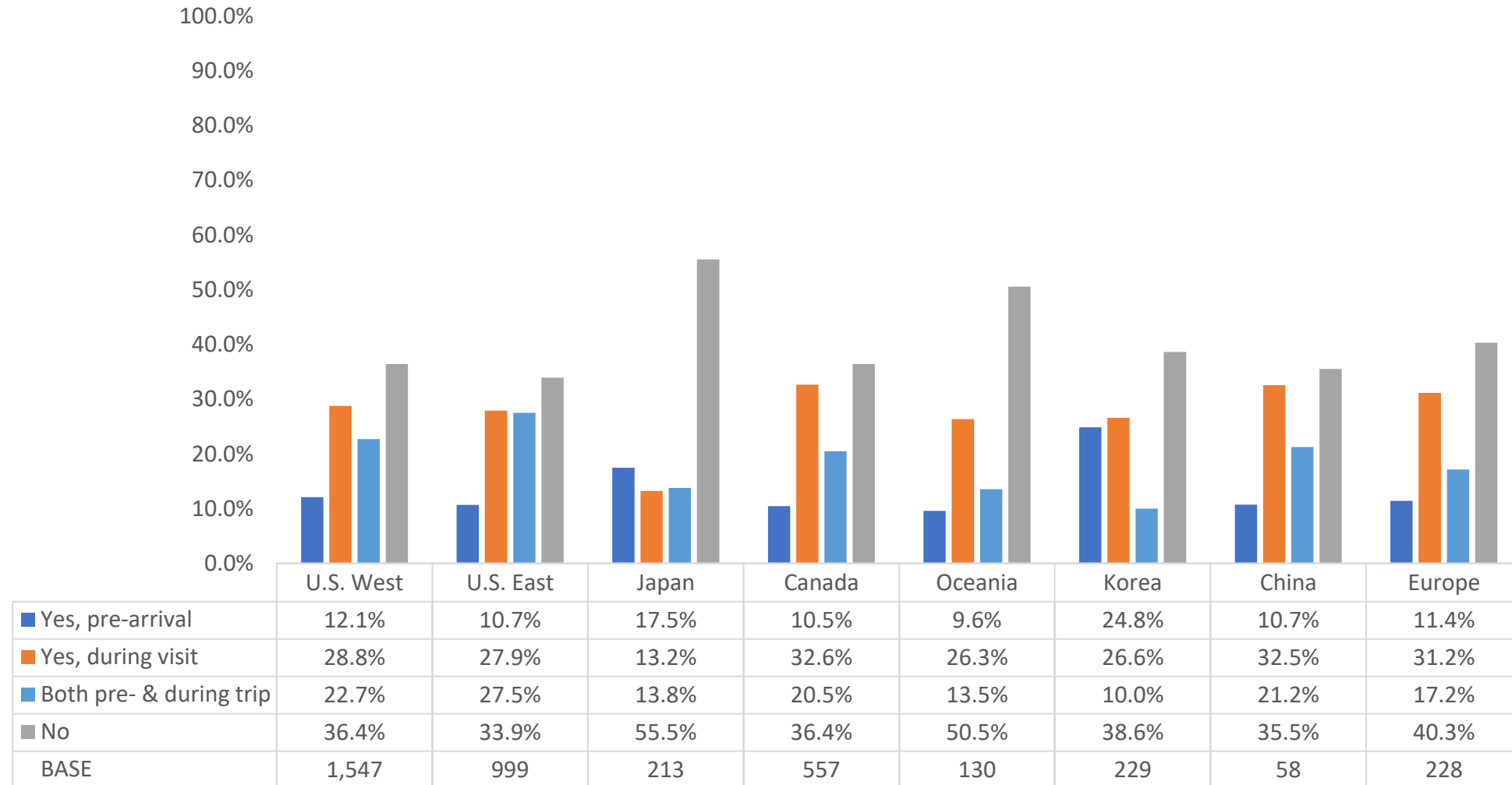


# VOLUNTEER / GIVE-BACK OPPORTUNITIES

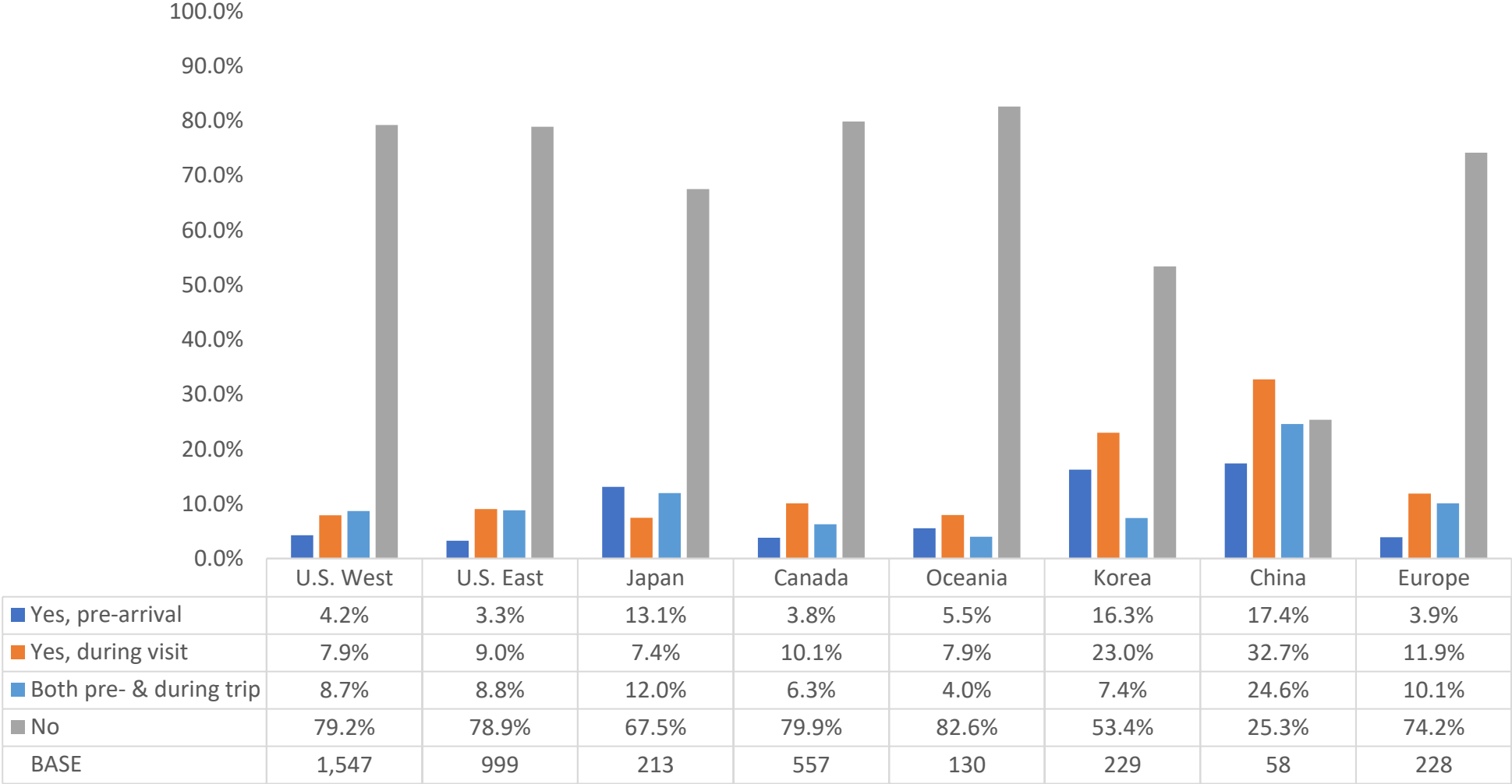




# SUPPORT LOCAL / SHOP LOCAL

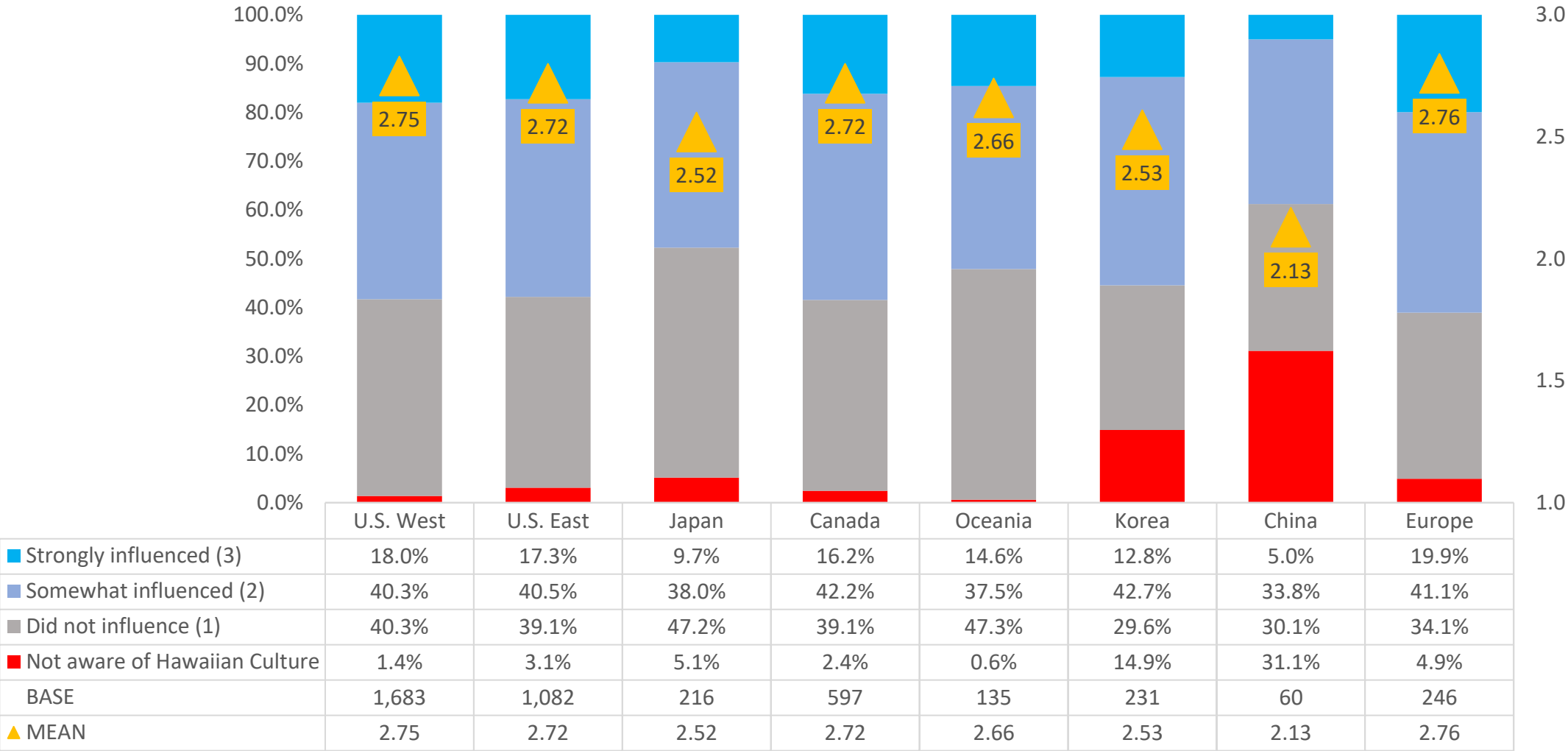


# MĀLAMA HAWAI‘I



# Section 5 – Hawaiian Culture

# HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



# Section 6 – Destination Drivers

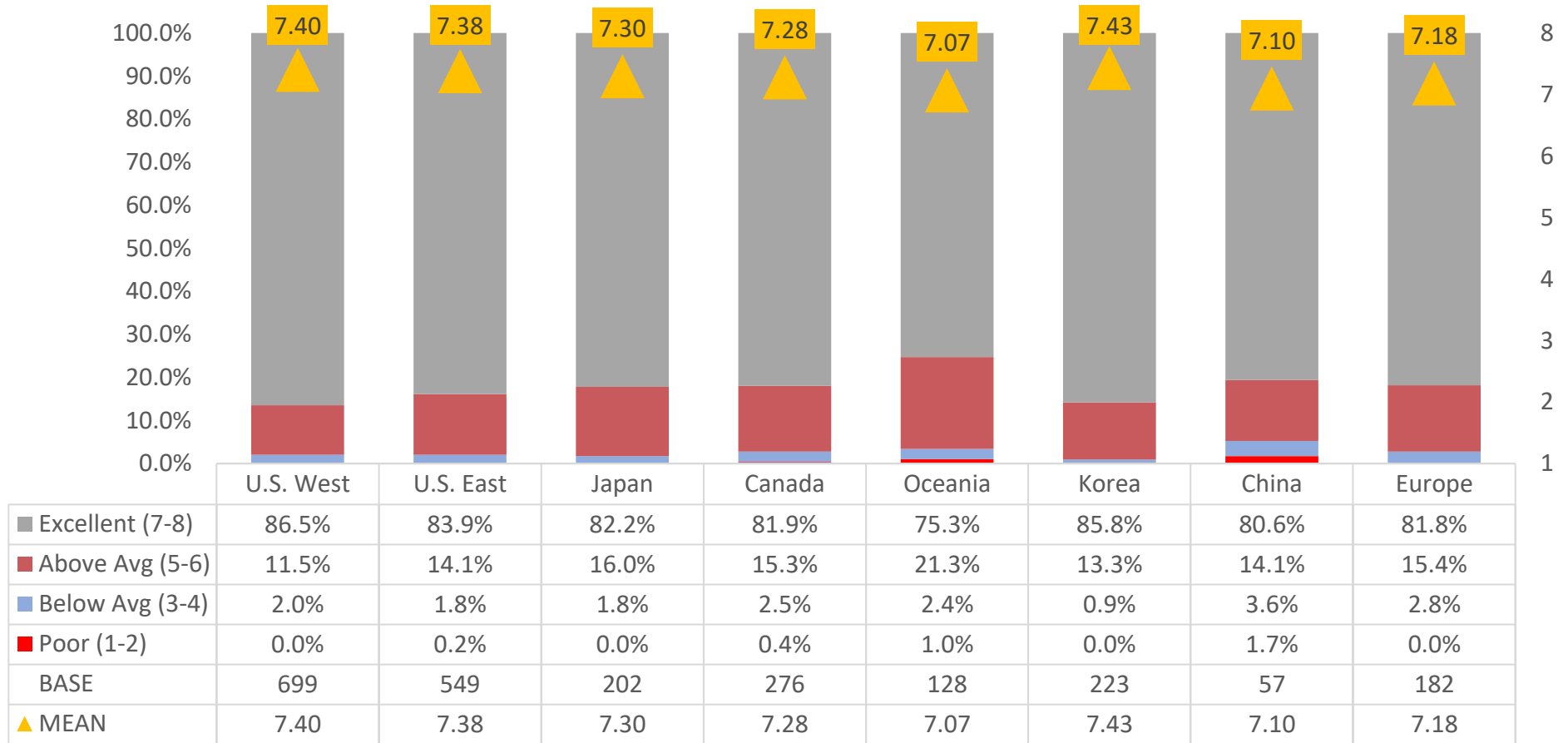
# DESTINATION DRIVERS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Time with family and friends, influence of family/ friends	17.5%	17.2%	7.2%	12.6%	3.8%	7.4%	3.4%	15.1%
Personal connection, repeat visitor	14.9%	13.9%	8.2%	17.5%	5.6%	3.4%	3.6%	8.7%
Weather, climate	14.0%	10.6%	8.6%	18.7%	8.9%	12.9%	1.6%	8.9%
Personal preference, love Hawai'i	12.0%	11.6%	14.2%	14.2%	13.5%	5.5%	8.4%	11.3%
Natural beauty and scenery	8.9%	10.2%	1.4%	14.5%	7.9%	13.2%	14.9%	16.4%
Other	6.0%	5.3%	34.4%	4.1%	6.4%	33.3%	37.9%	9.0%
First-time visitor, wanted to experience HI	6.1%	11.7%	3.6%	8.3%	7.1%	5.4%	14.5%	15.0%
Special event or occasion	7.7%	9.5%	5.5%	5.8%	4.4%	1.8%	0.0%	3.3%
Convenience, proximity, location	8.9%	3.1%	4.6%	5.0%	39.4%	0.4%	3.4%	5.8%
Beaches, ocean activities	9.1%	3.8%	1.8%	7.5%	7.6%	4.9%	6.8%	4.1%
Work, business trip	5.5%	10.6%	1.8%	3.6%	1.6%	2.3%	5.4%	12.1%
BASE	1,692	1,085	216	596	135	220	60	245

# Section 7 – O‘ahu

# SATISFACTION - O'AHU

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



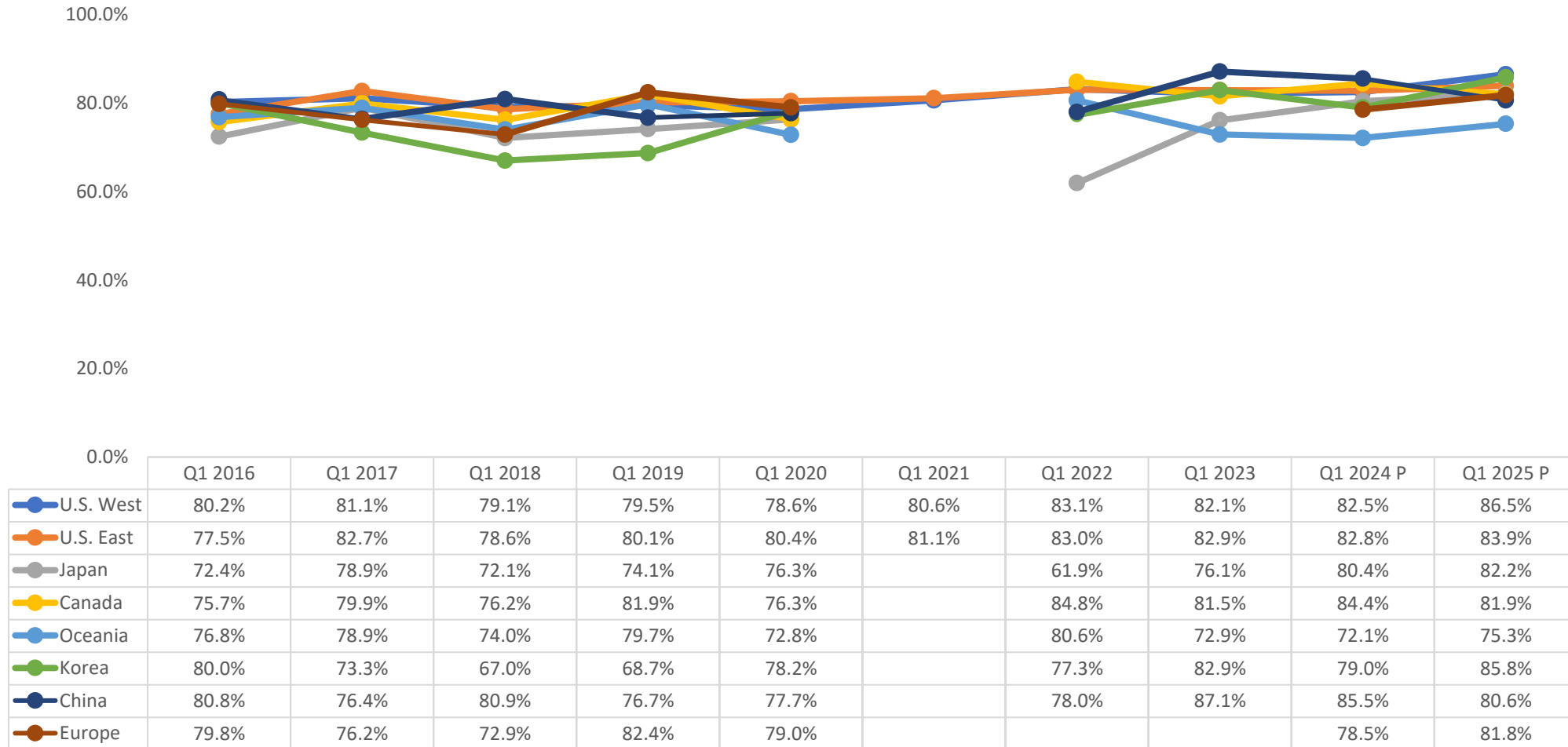


# SATISFACTION – O‘AHU

- **Gender:** Female respondents from **U.S. West** and **Oceania** express higher levels of satisfaction compared to male respondents from these visitor markets.
- **Age:** Seniors (65 years and older) from **Japan** give lower satisfaction scores compared to younger travelers from this visitor market.
- **Islands visited:** Visitors from **U.S. West** and **U.S. East** whose trip consisted of staying on just O‘ahu give higher mean satisfaction score compared to those whose trip consisted of stops on multiple islands.
- **Household income:** Those who reside in homes in the bottom income tier (<\$100K) from **Oceania** give higher satisfaction scores than more affluent travelers from this visitor market.
- **Education:** College graduates from **Japan** are more satisfied with their stay than those without a college degree from this visitor market.

# SATISFACTION - O'AHU

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



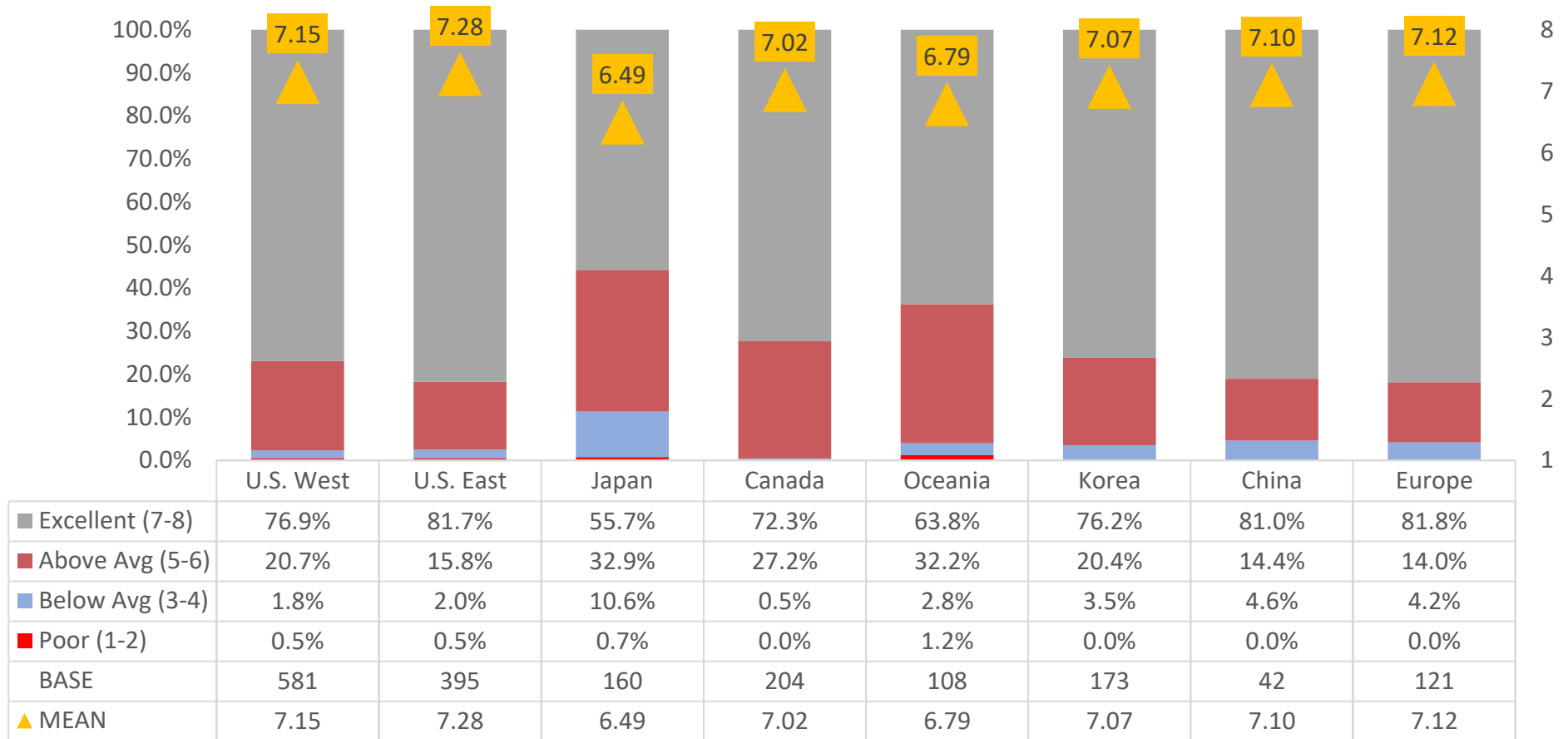
P= Preliminary Data

Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

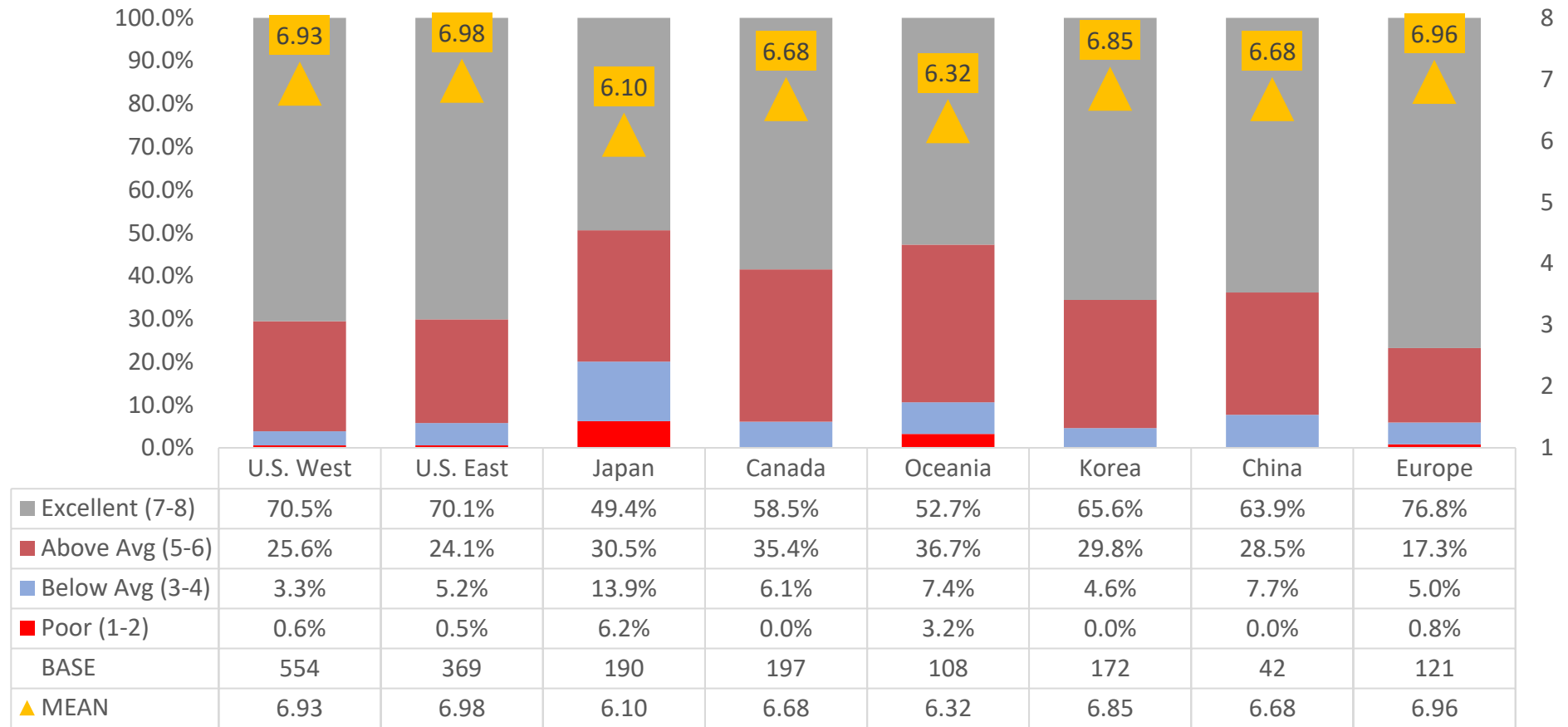
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



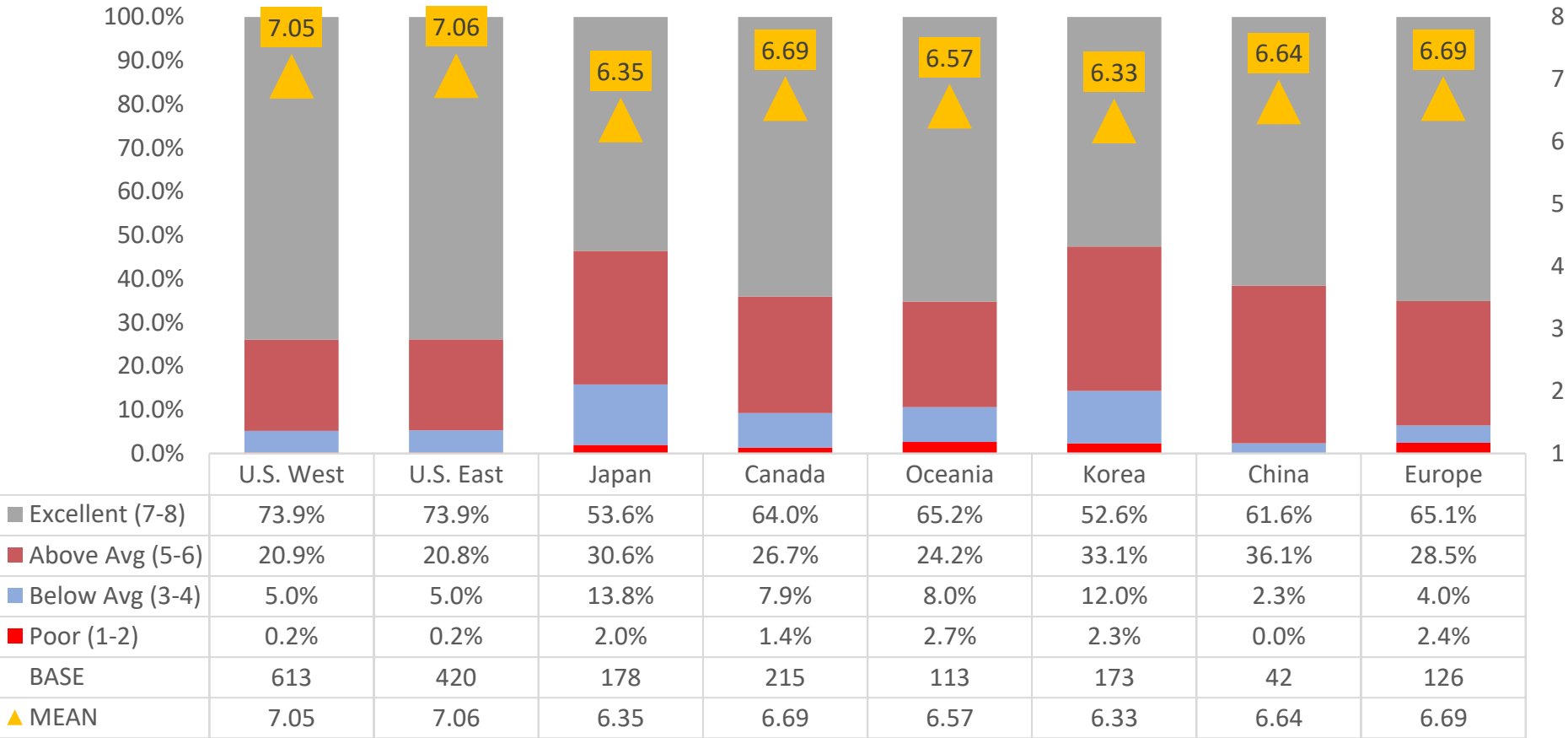
# SHOPPING - O'AHU

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



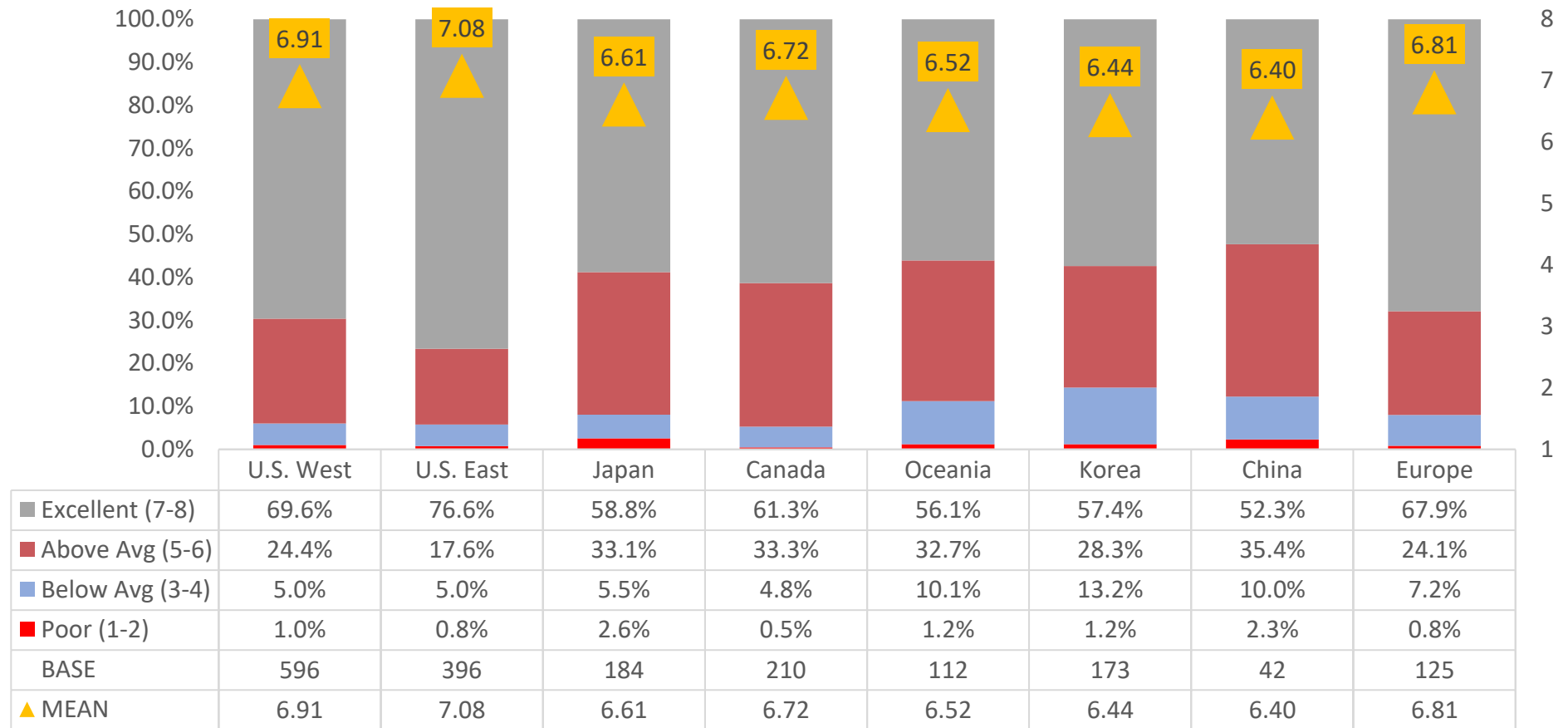
# DINING/ FOOD & BEVERAGES - O'AHU

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



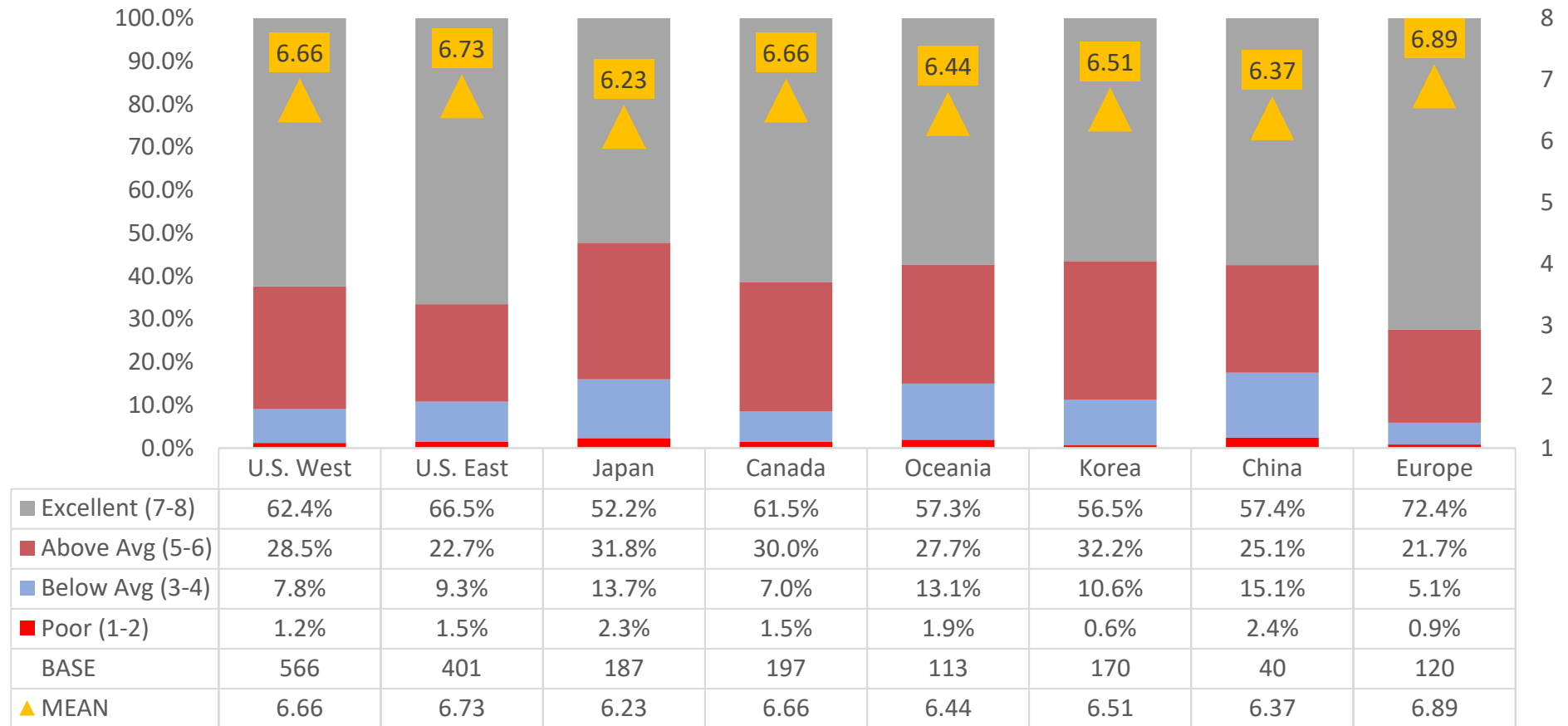
# LODGING/ ACOMMODATIONS - O‘AHU

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



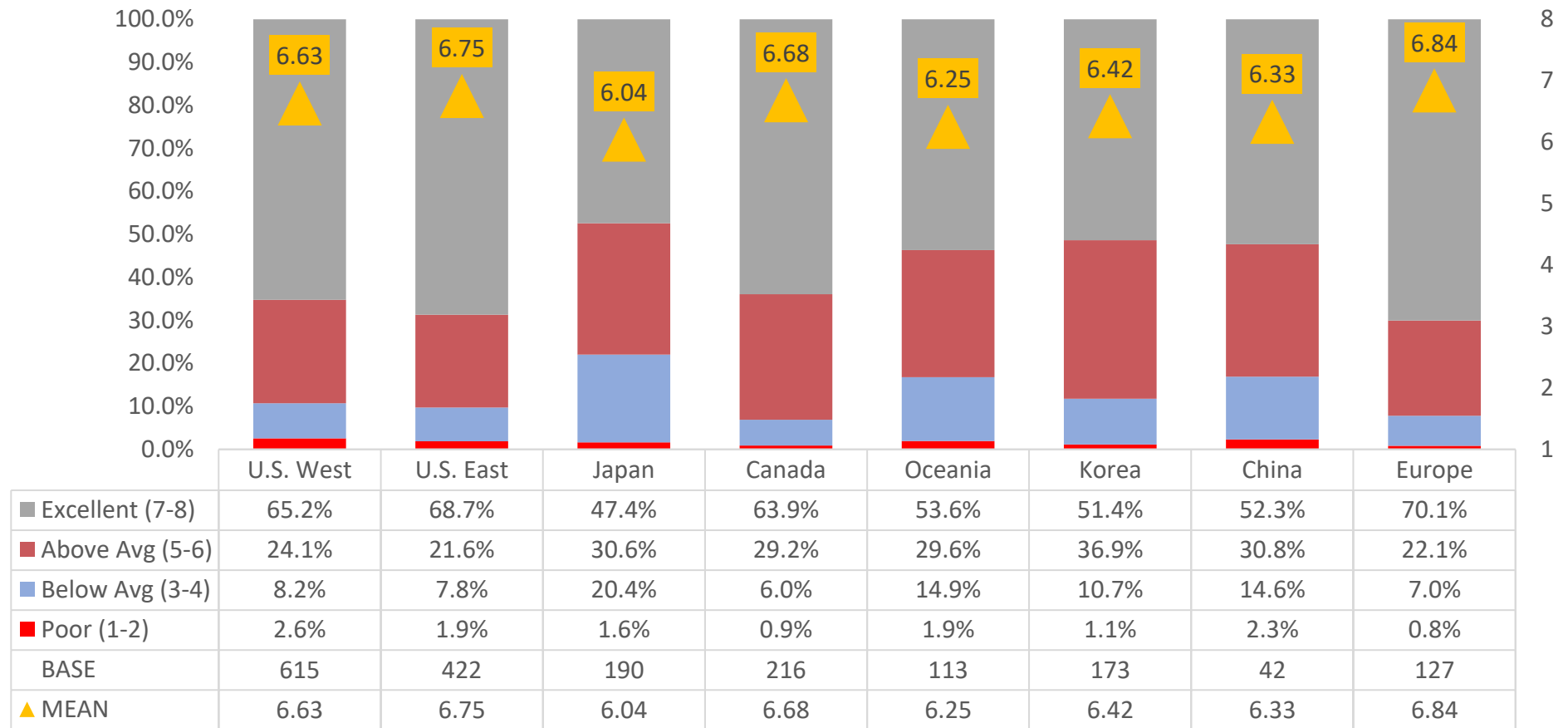
# TRANSPORTATION ON ISLAND - O'AHU

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



# AIRPORT - O'AHU

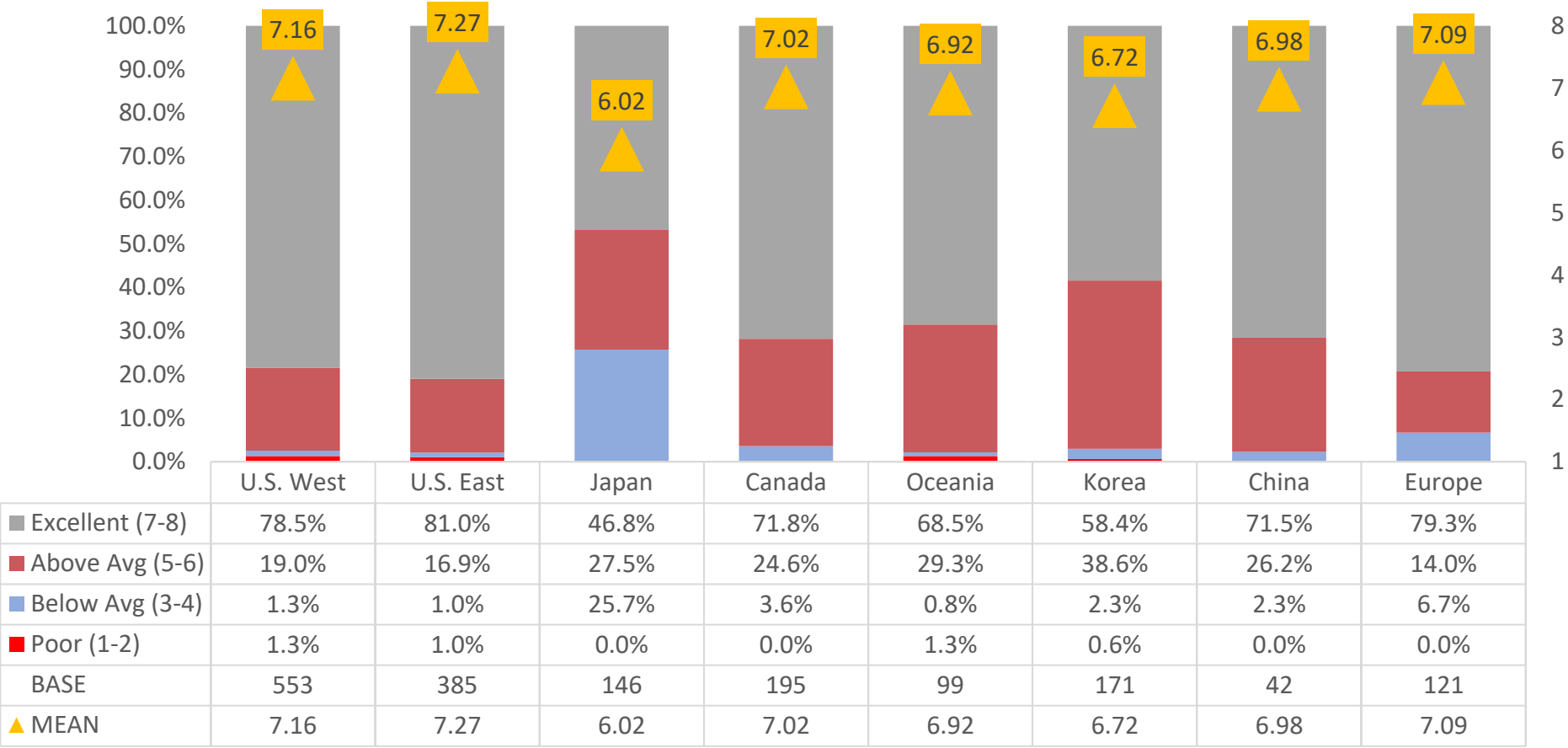
8-pt Rating Scale  
8 = Excellent / 1 = Poor





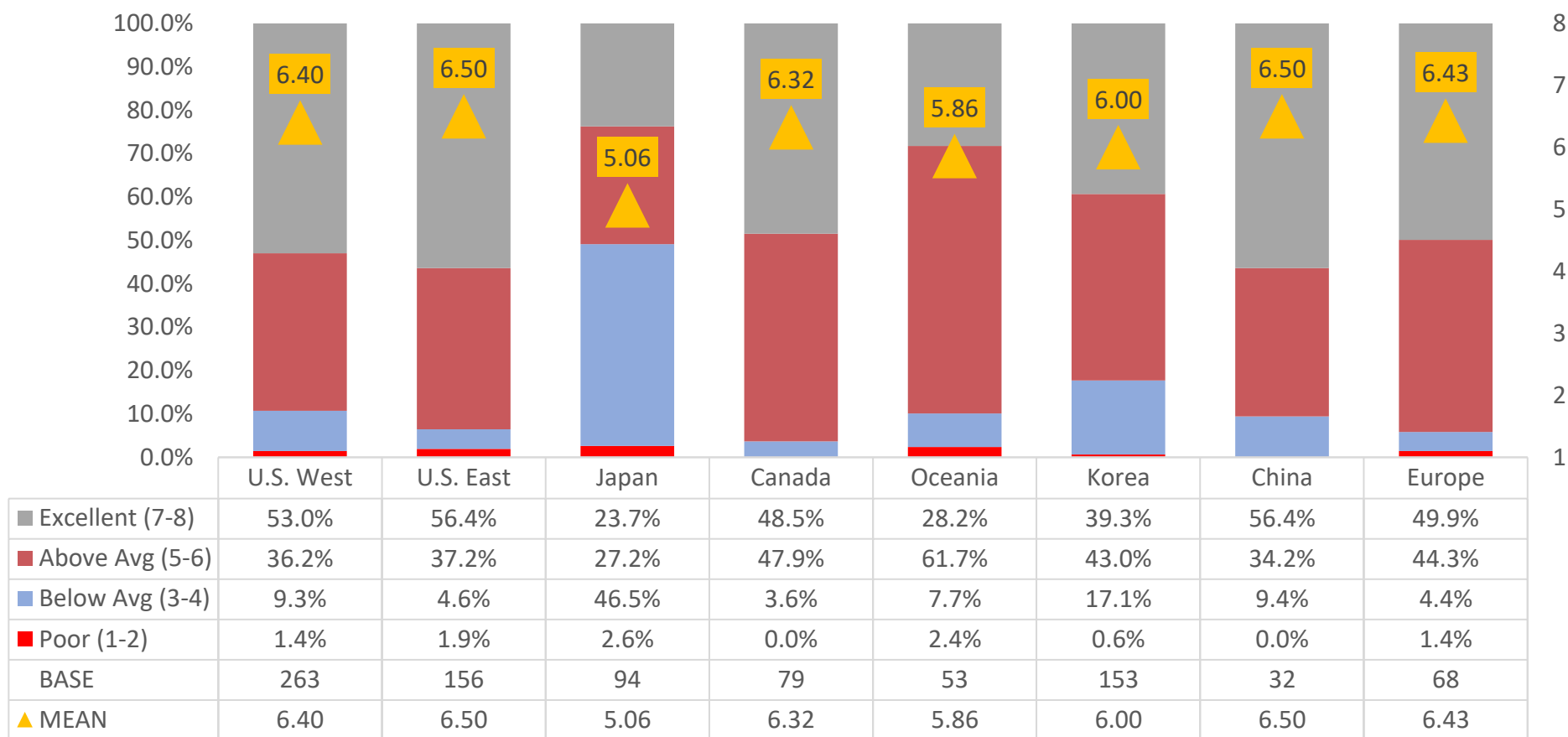
# CULTURAL EXPERIENCES - O'AHU

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



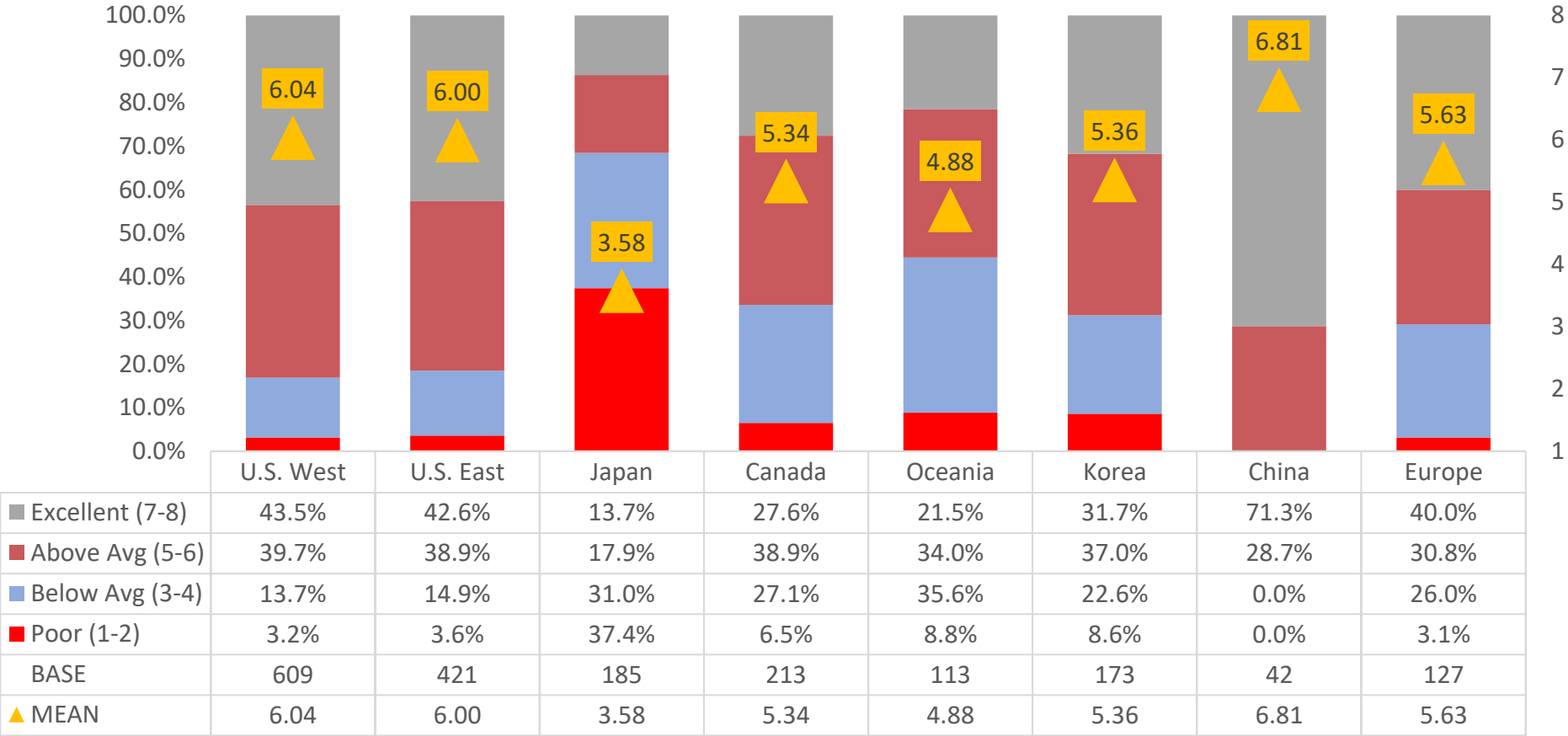
# VOLUNTEER EXPERIENCES - O'AHU

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



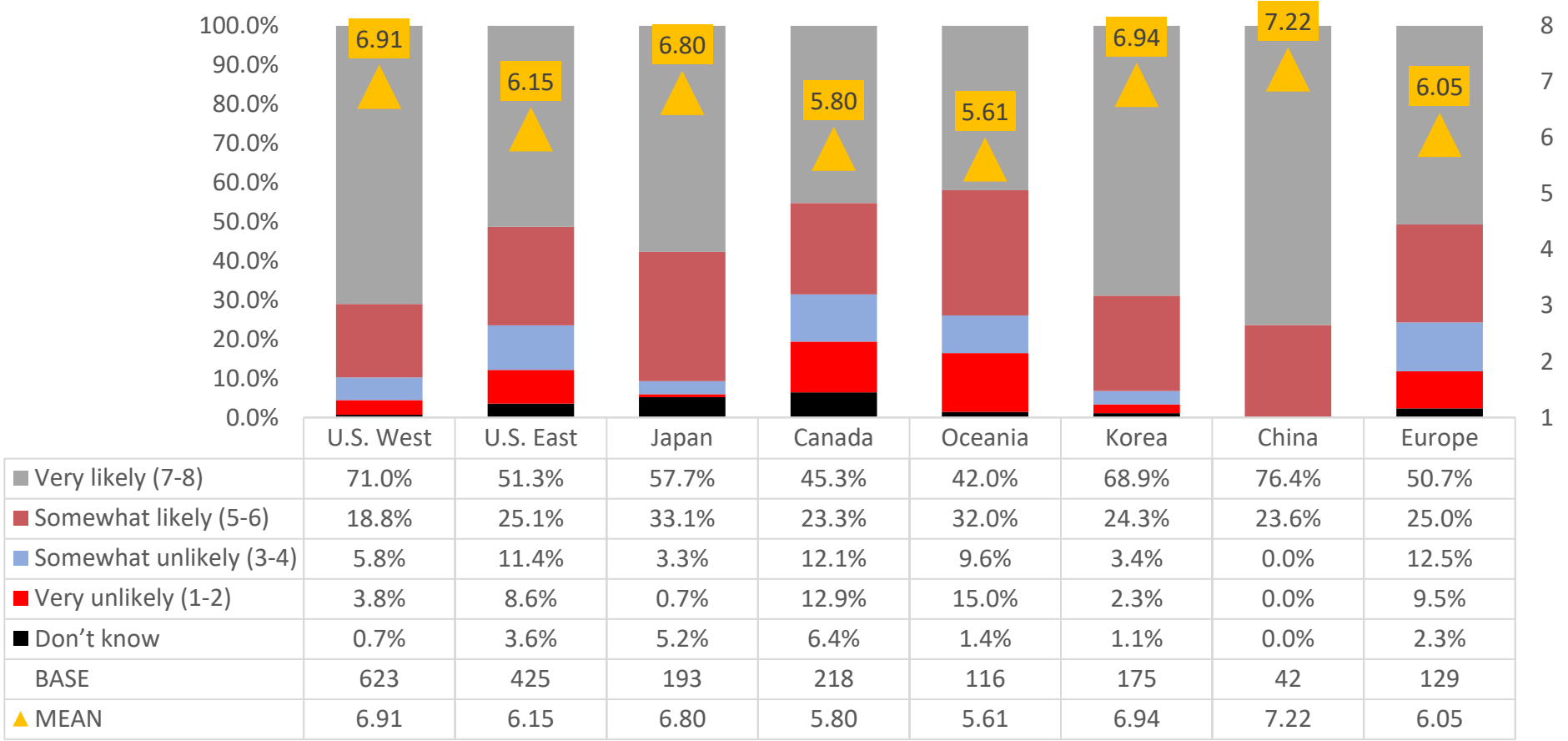
# OVERALL VALUE FOR THE MONEY – O‘AHU

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



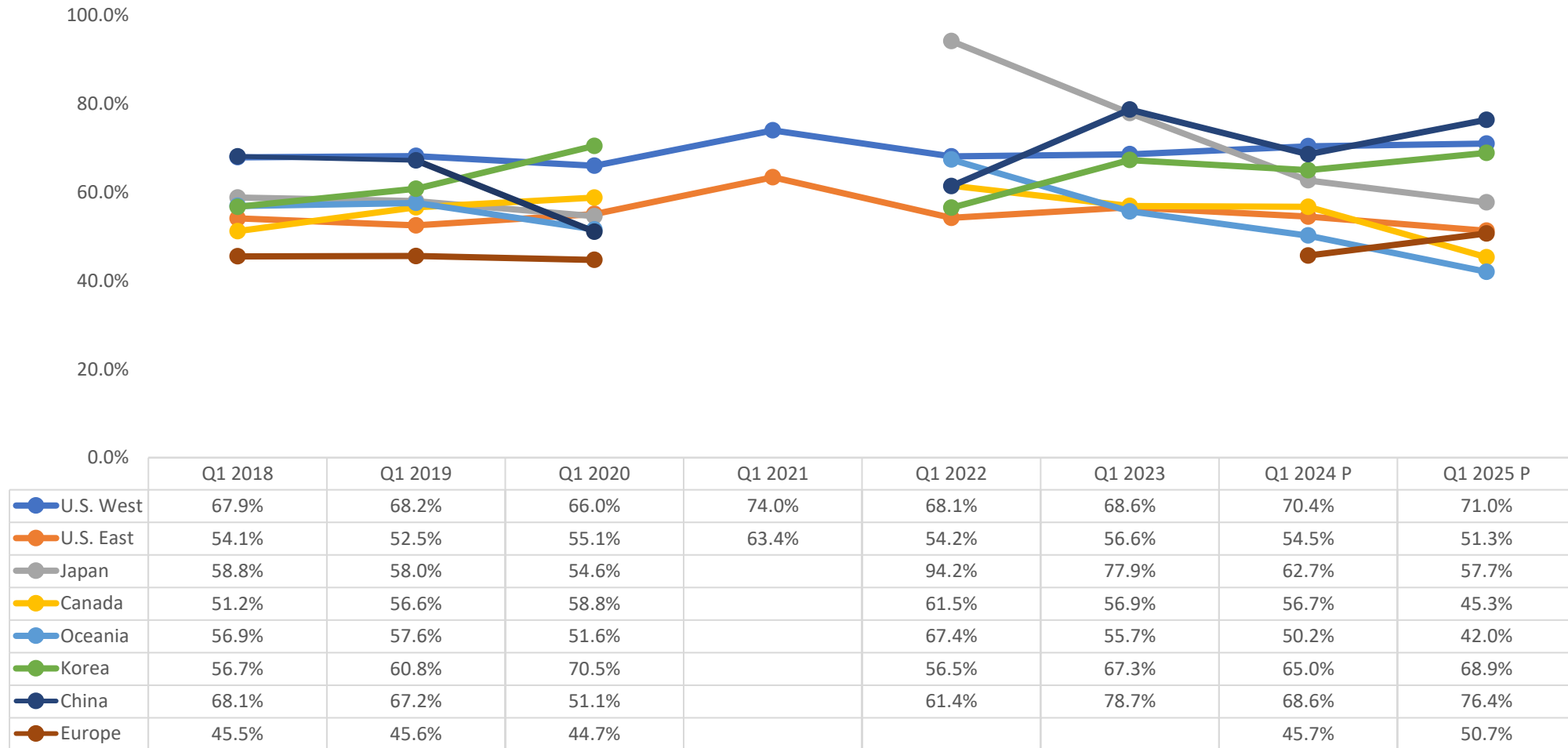
# LIKELIHOOD OF RETURN VISIT - O‘AHU

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



# LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

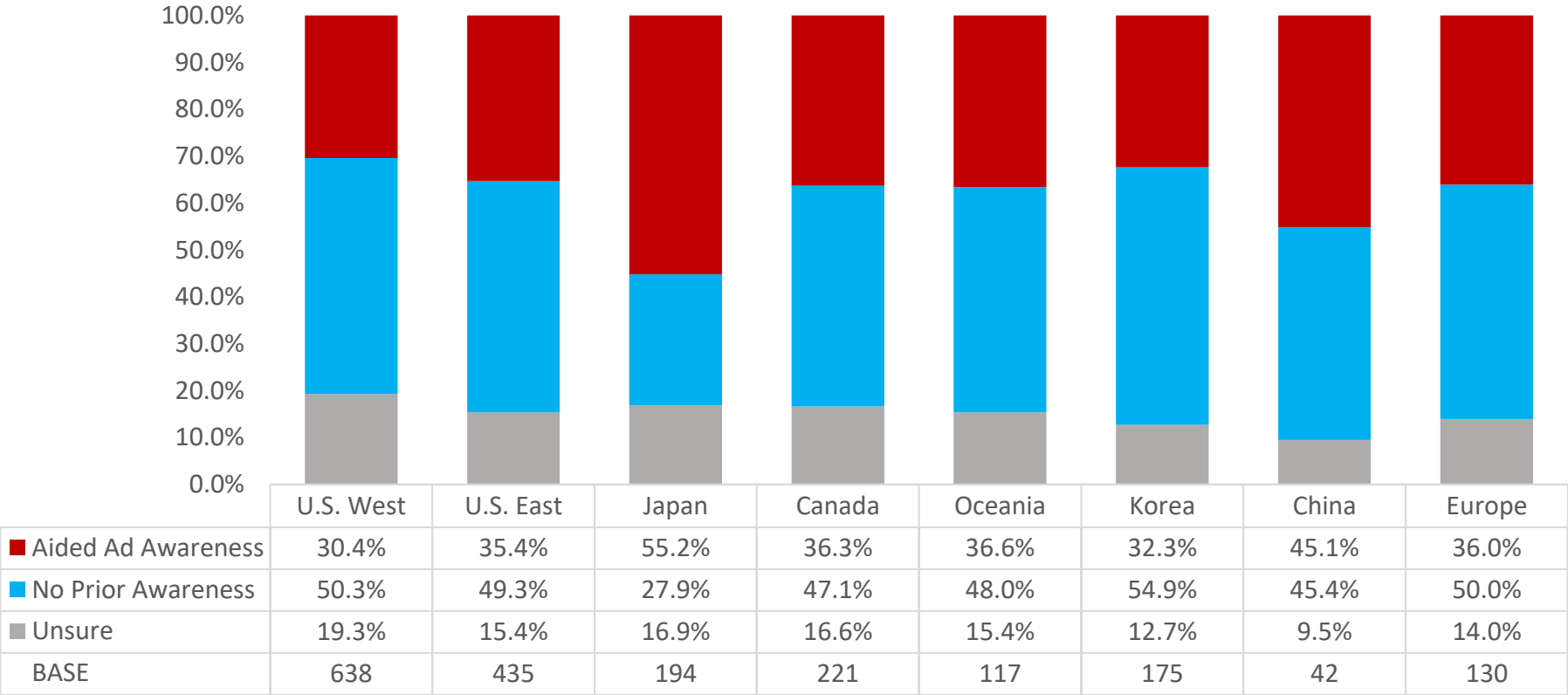


P= Preliminary Data

Q. How likely are you to visit O'ahu again in the next five years?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

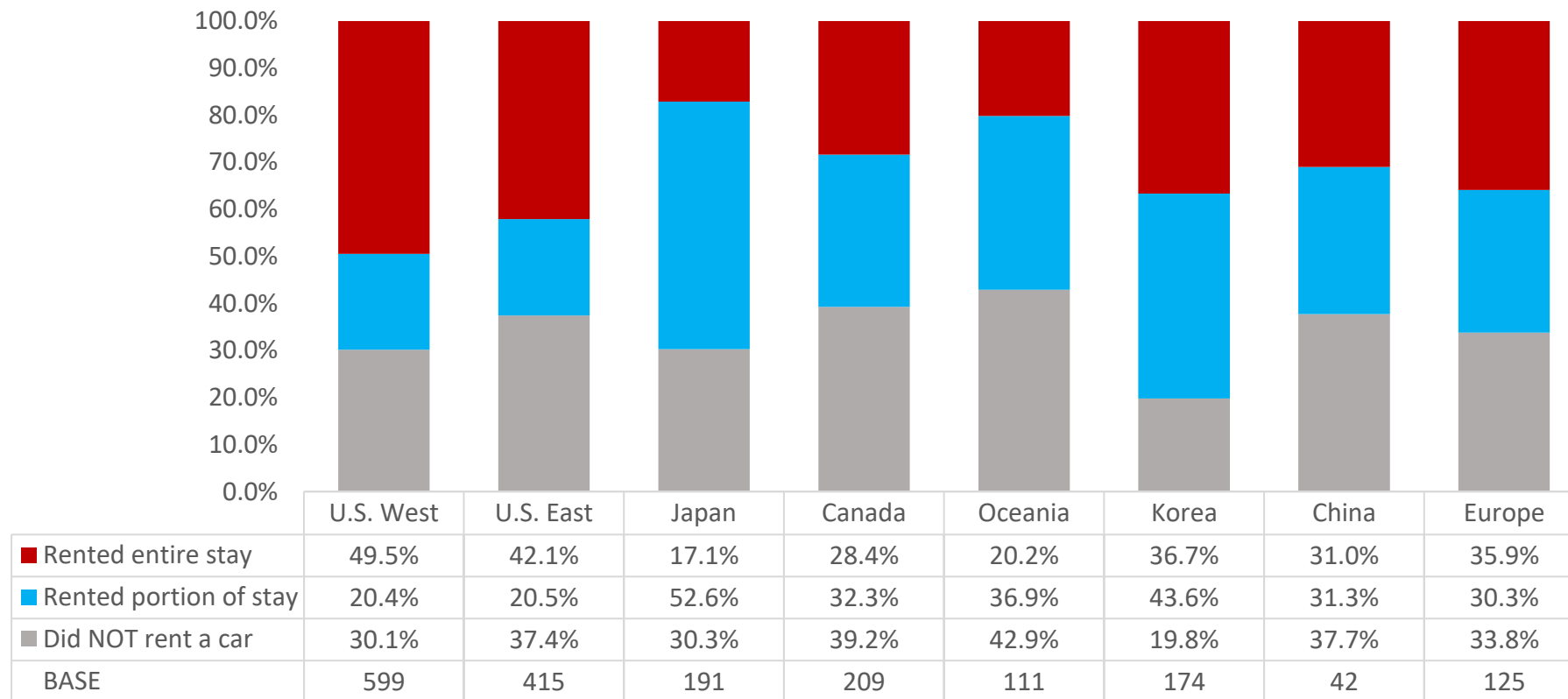
# AIDED ADVERTISING AWARENESS - O‘AHU



# MOTIVATING FACTORS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	41.4%	49.6%	41.0%	58.2%	56.8%	71.5%	55.4%	52.3%
<b>Hawaiian cultural experiences and Hawaiian cultural events</b>	25.1%	27.6%	15.6%	35.1%	22.1%	23.8%	5.8%	24.0%
<b>Social media posts and videos</b>	17.3%	20.5%	40.1%	26.3%	26.1%	11.8%	23.7%	35.6%
<b>Television programs or movies filmed in Hawai‘i</b>	10.3%	17.8%	46.0%	20.5%	25.6%	28.0%	15.6%	36.3%
<b>Outdoor or sporting activities and events</b>	12.6%	12.0%	13.3%	15.6%	15.4%	19.2%	16.1%	13.2%
<b>Hawaiian music</b>	14.1%	12.7%	20.5%	17.7%	12.9%	10.0%	3.4%	13.1%
<b>Attend a festival or other event</b>	7.5%	6.1%	5.0%	6.0%	1.4%	4.6%	3.5%	4.5%
<b>BASE</b>	637	433	194	220	117	42	175	130

# CAR RENTAL - O'AHU

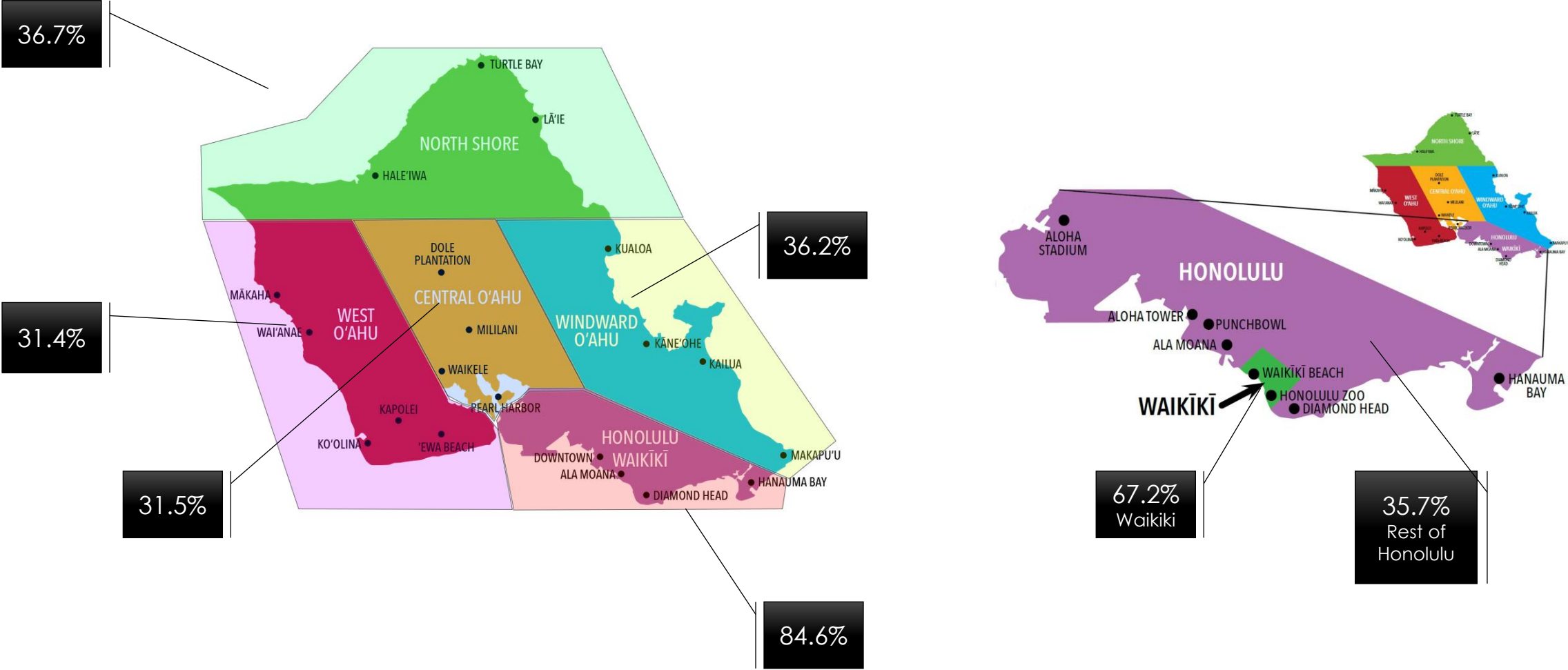




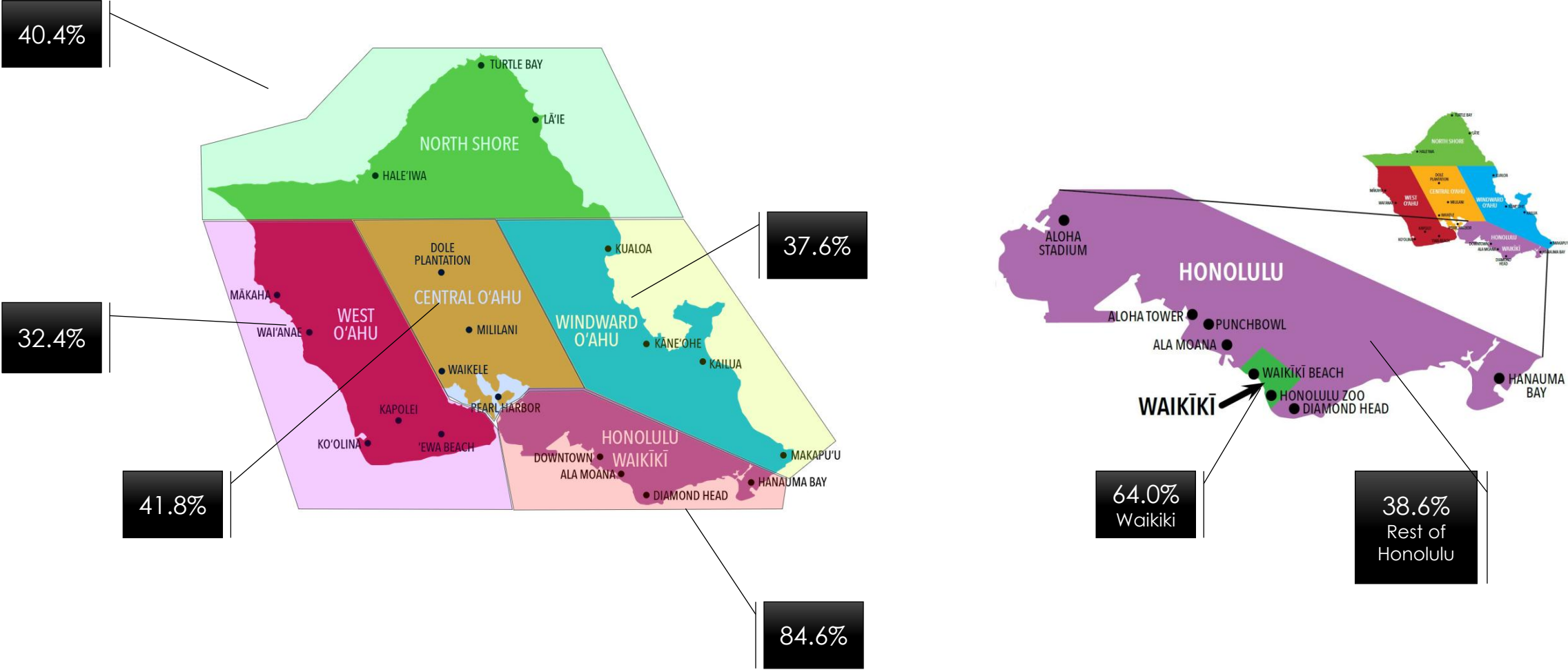
# REASONS FOR PARTIAL RENTAL CAR – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	75.9%	73.6%	85.6%	71.9%	84.6%	62.3%	53.7%	86.7%
Parking was too expensive at my hotel/ lodging	37.6%	37.0%	6.6%	44.7%	25.1%	30.3%	34.6%	31.5%
Car rental rates were too expensive	17.7%	17.9%	14.4%	26.6%	18.6%	30.3%	39.7%	13.2%
Wanted to reduce my carbon footprint	10.3%	13.2%	1.9%	9.0%	0.0%	15.6%	4.0%	13.5%
BASE	119	84	105	67	41	13	76	38

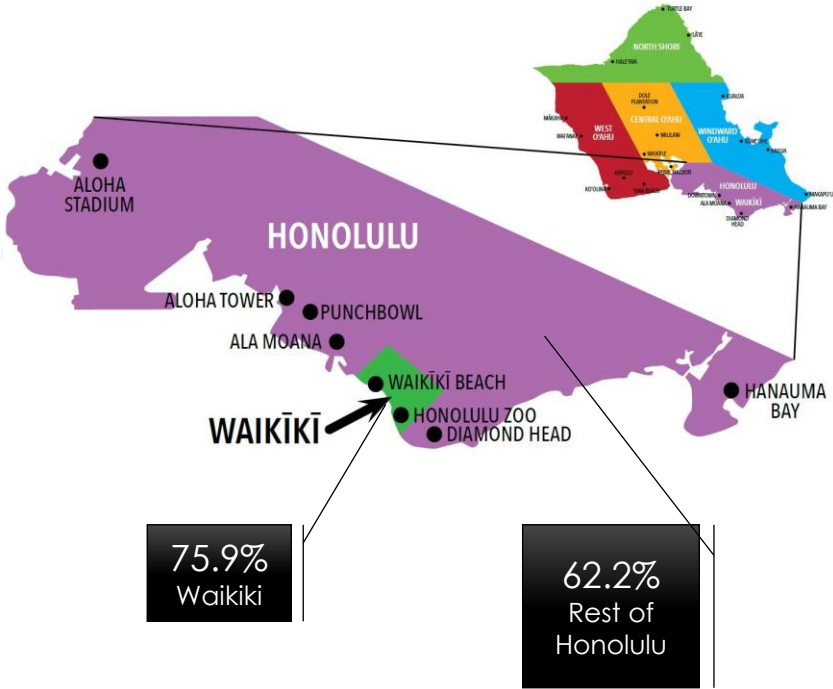
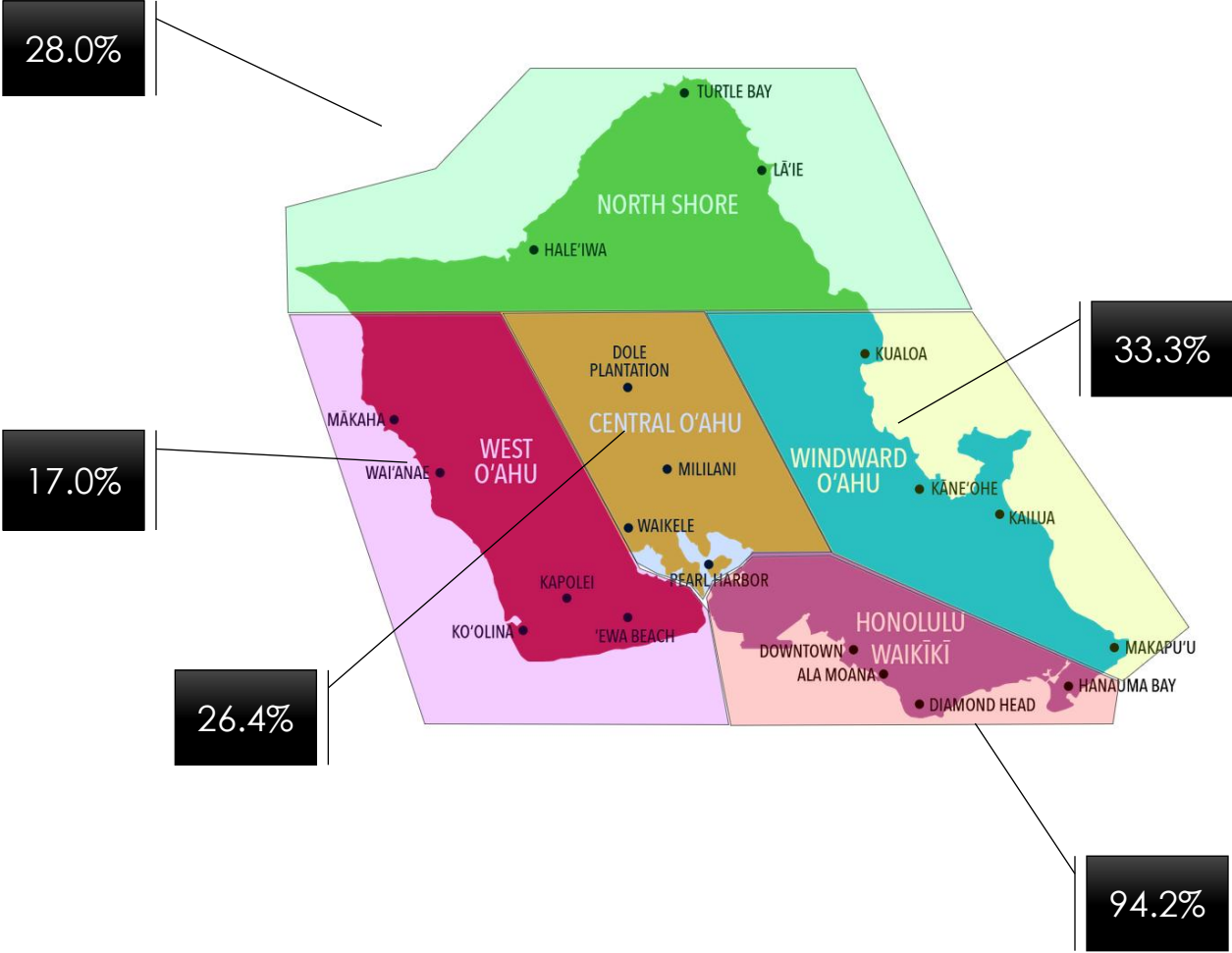
# AREAS VISITED O'AHU U.S. WEST



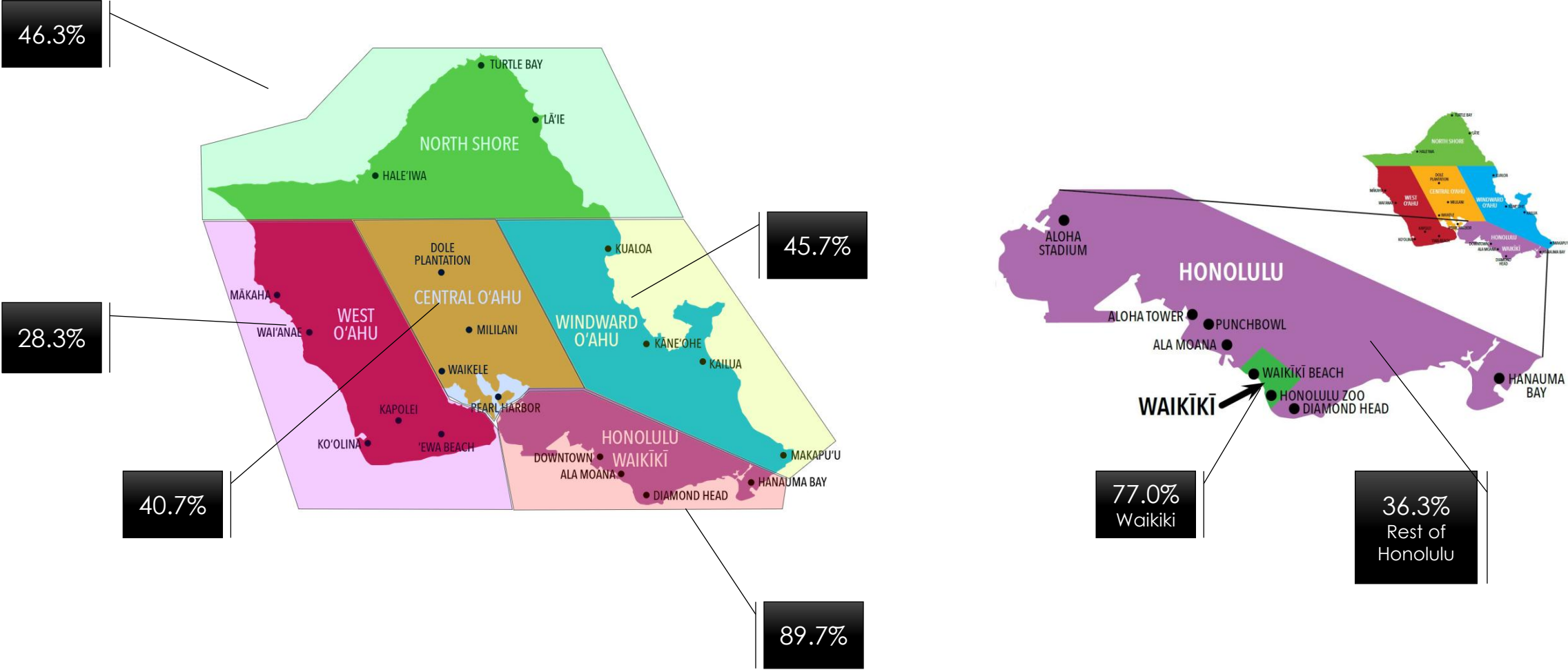
# AREAS VISITED O'AHU U.S. EAST



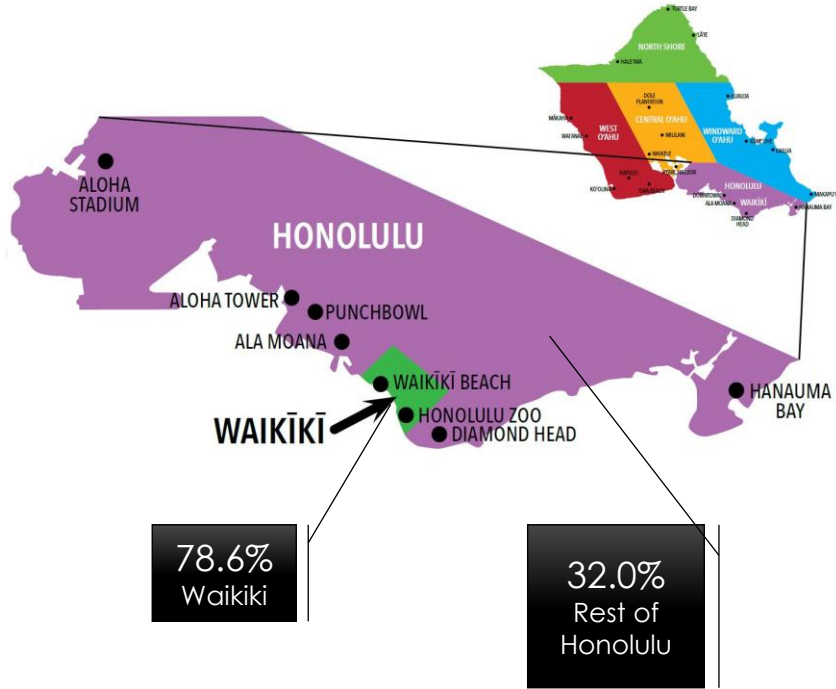
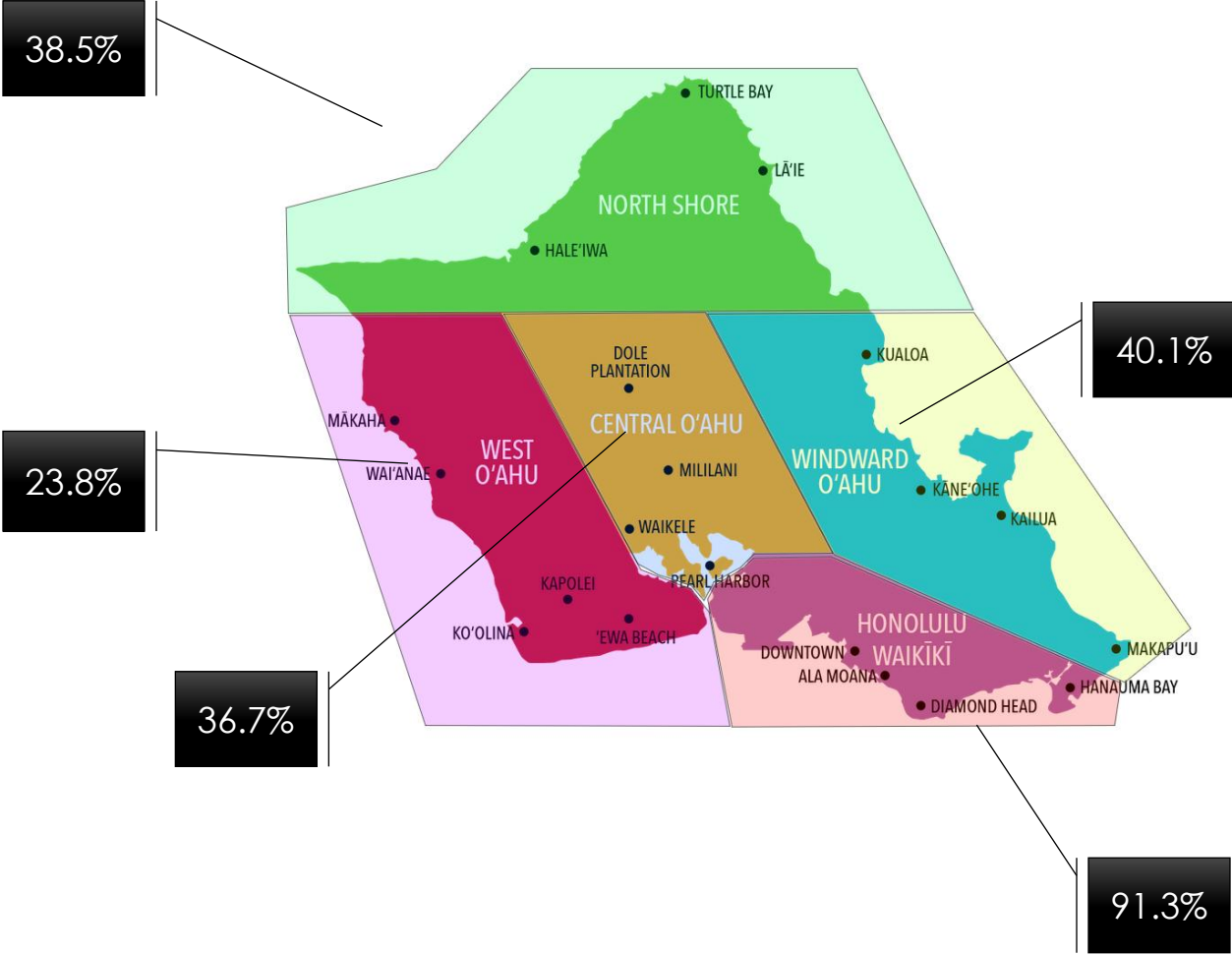
# AREAS VISITED O'AHU JAPAN



# AREAS VISITED O'AHU CANADA

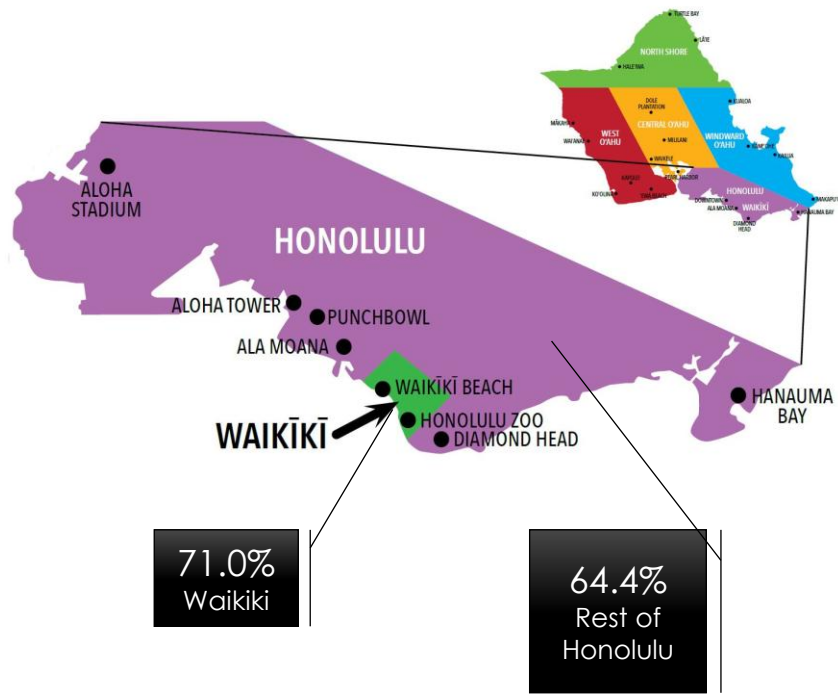
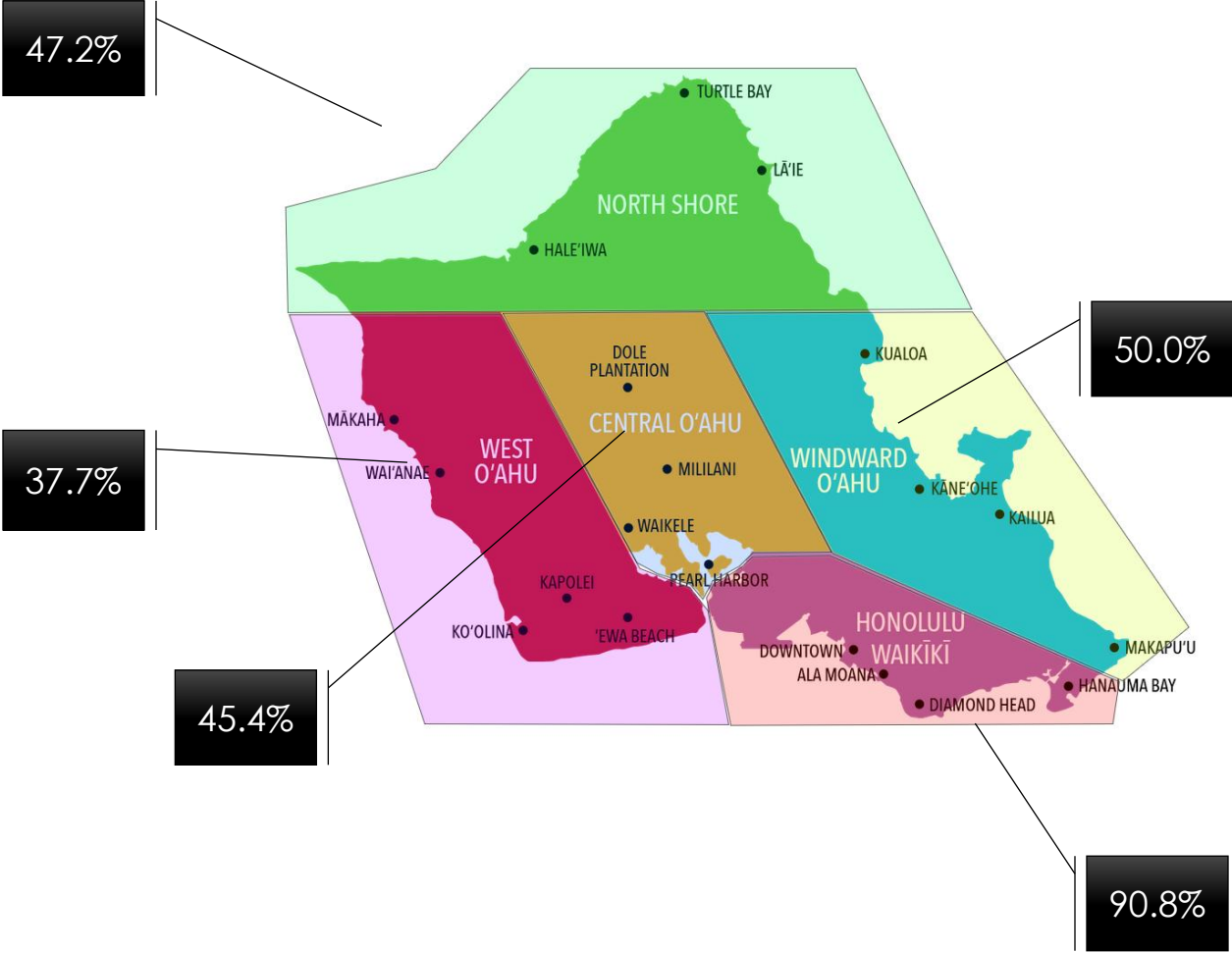


# AREAS VISITED O'AHU OCEANIA

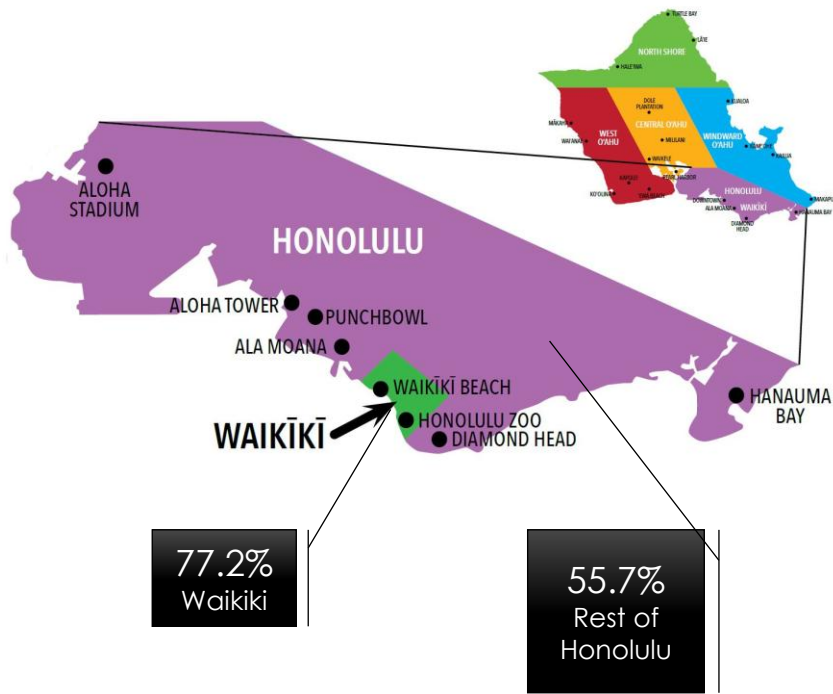
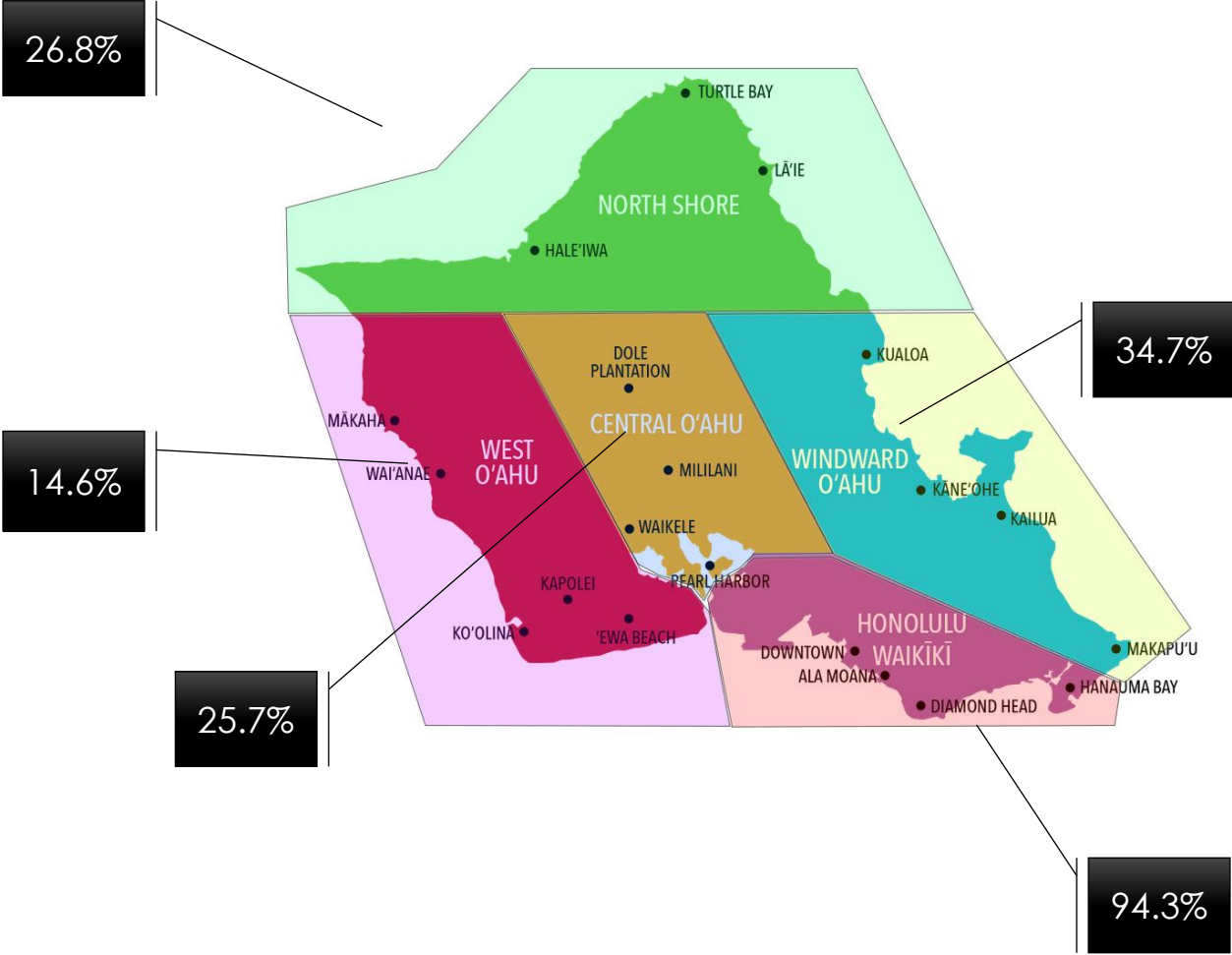




# AREAS VISITED O'AHU CHINA

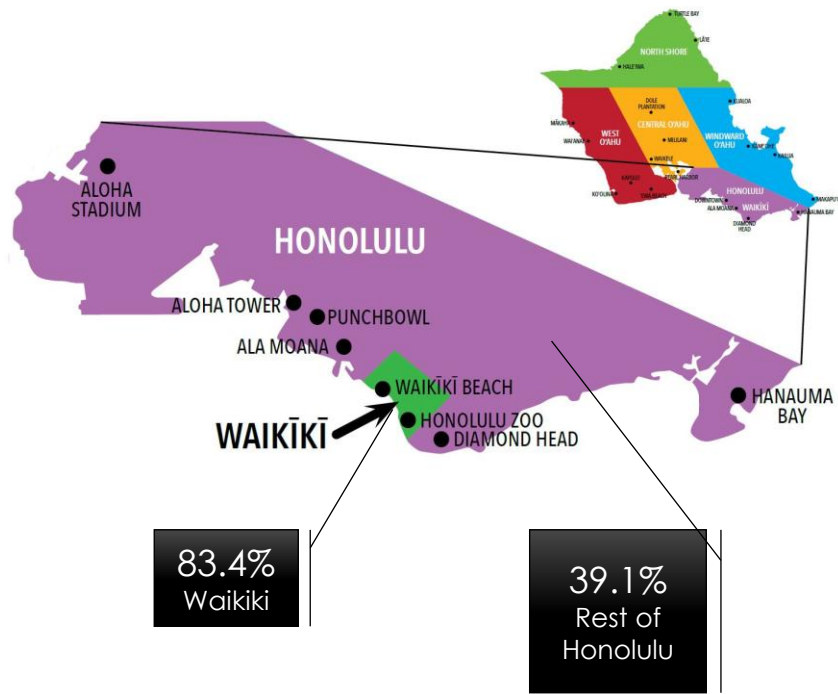
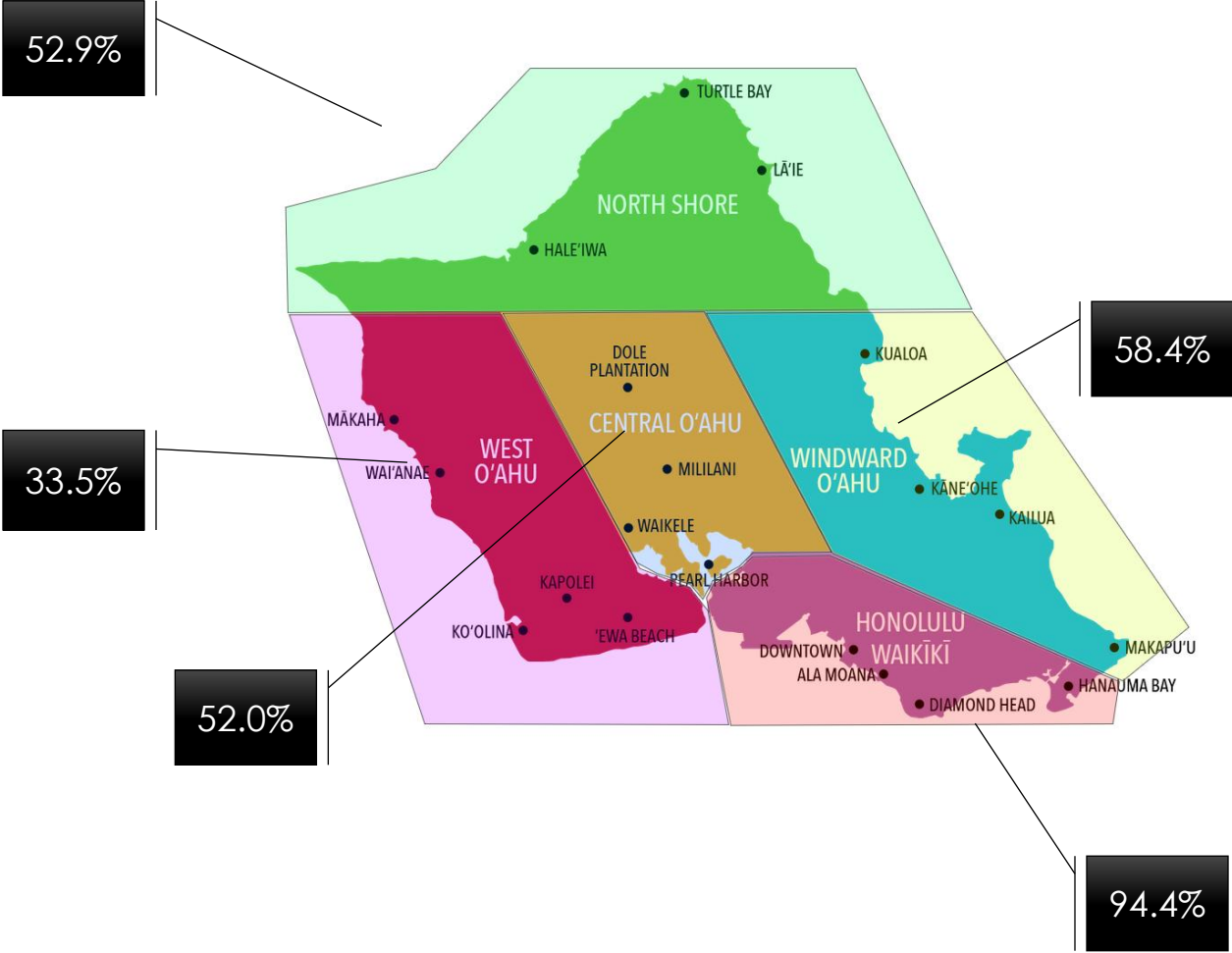


# AREAS VISITED O'AHU KOREA





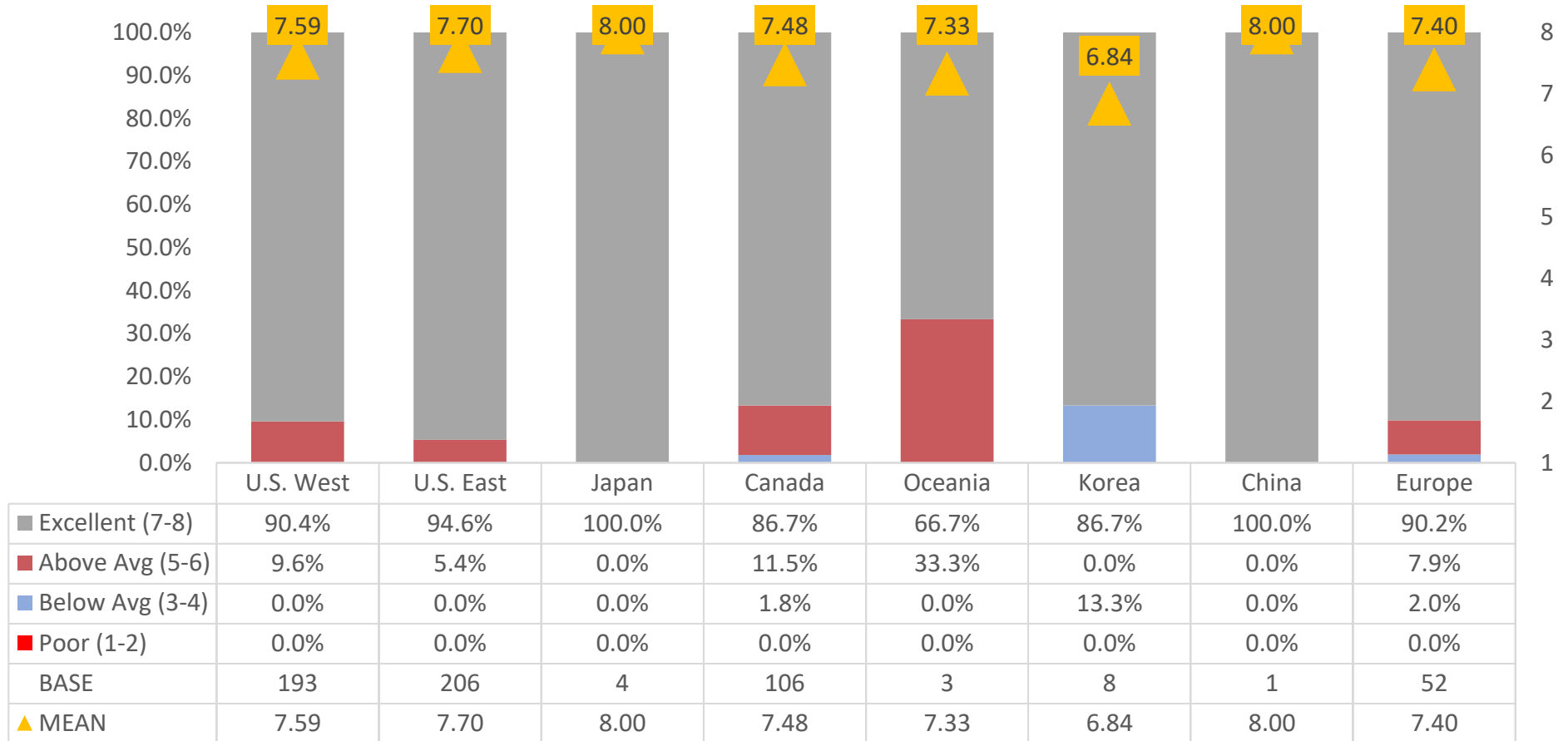
# AREAS VISITED O'AHU EUROPE



# Section 8 – Kauaʻi

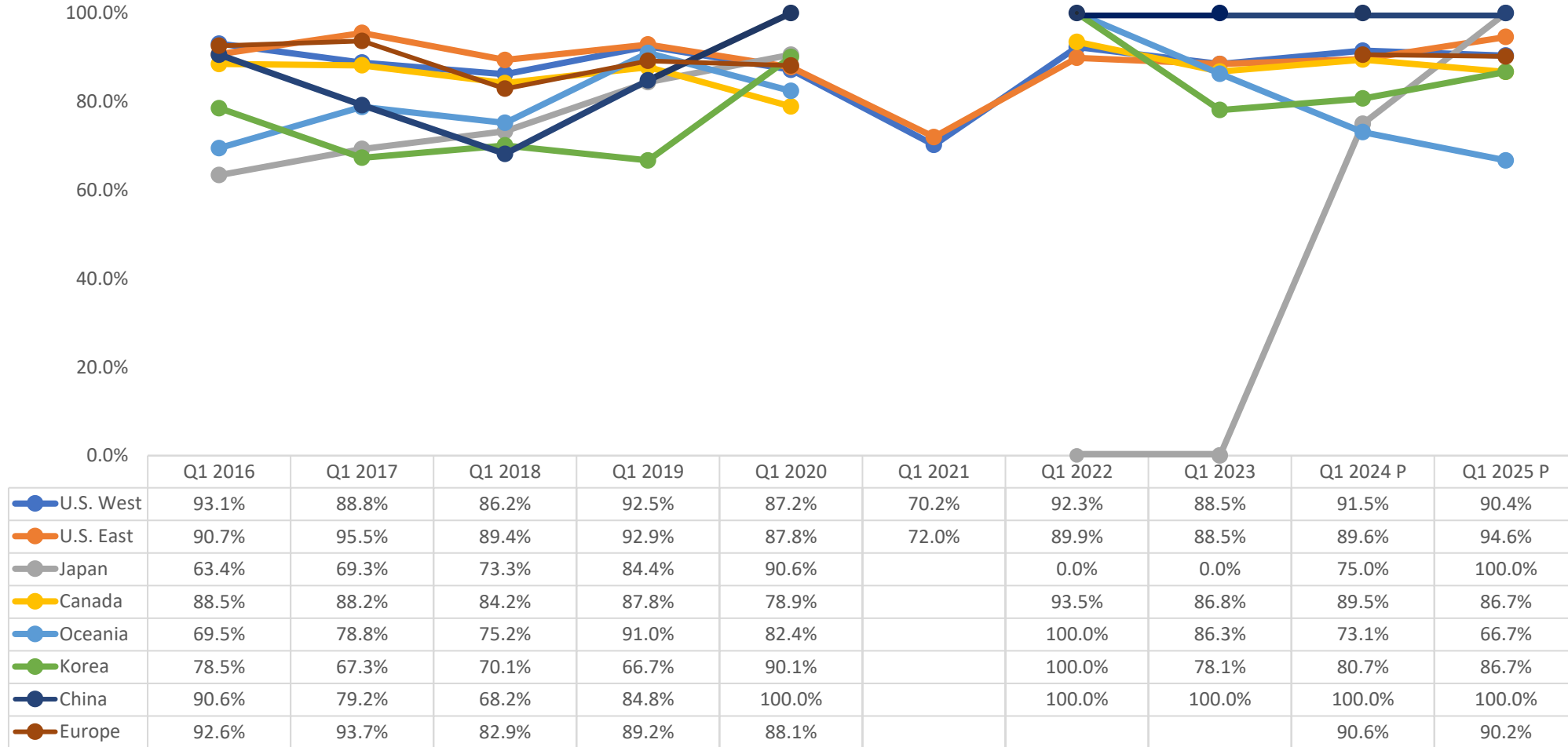
# SATISFACTION - KAUAI

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



# SATISFACTION – KAUAI

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



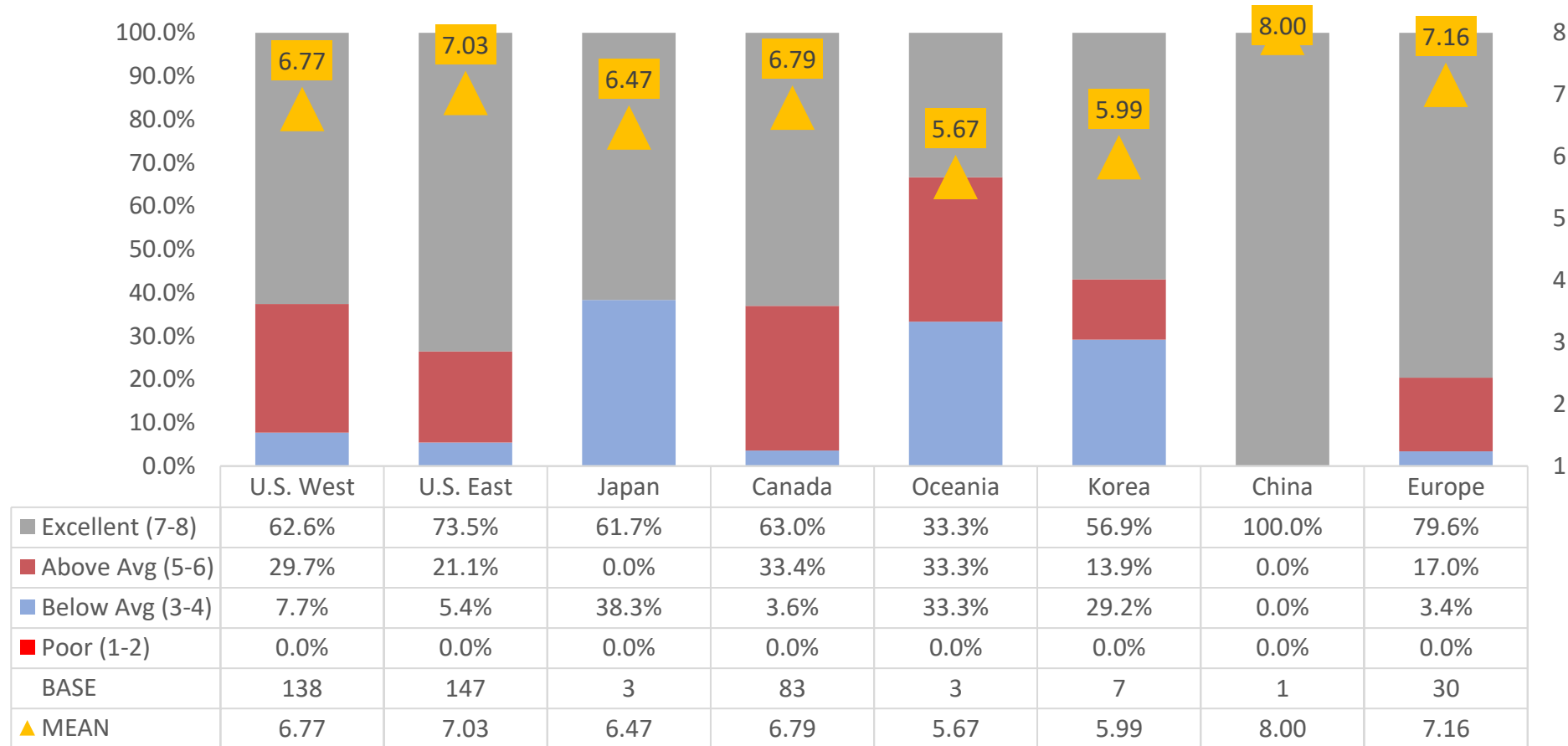
P= Preliminary Data

Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

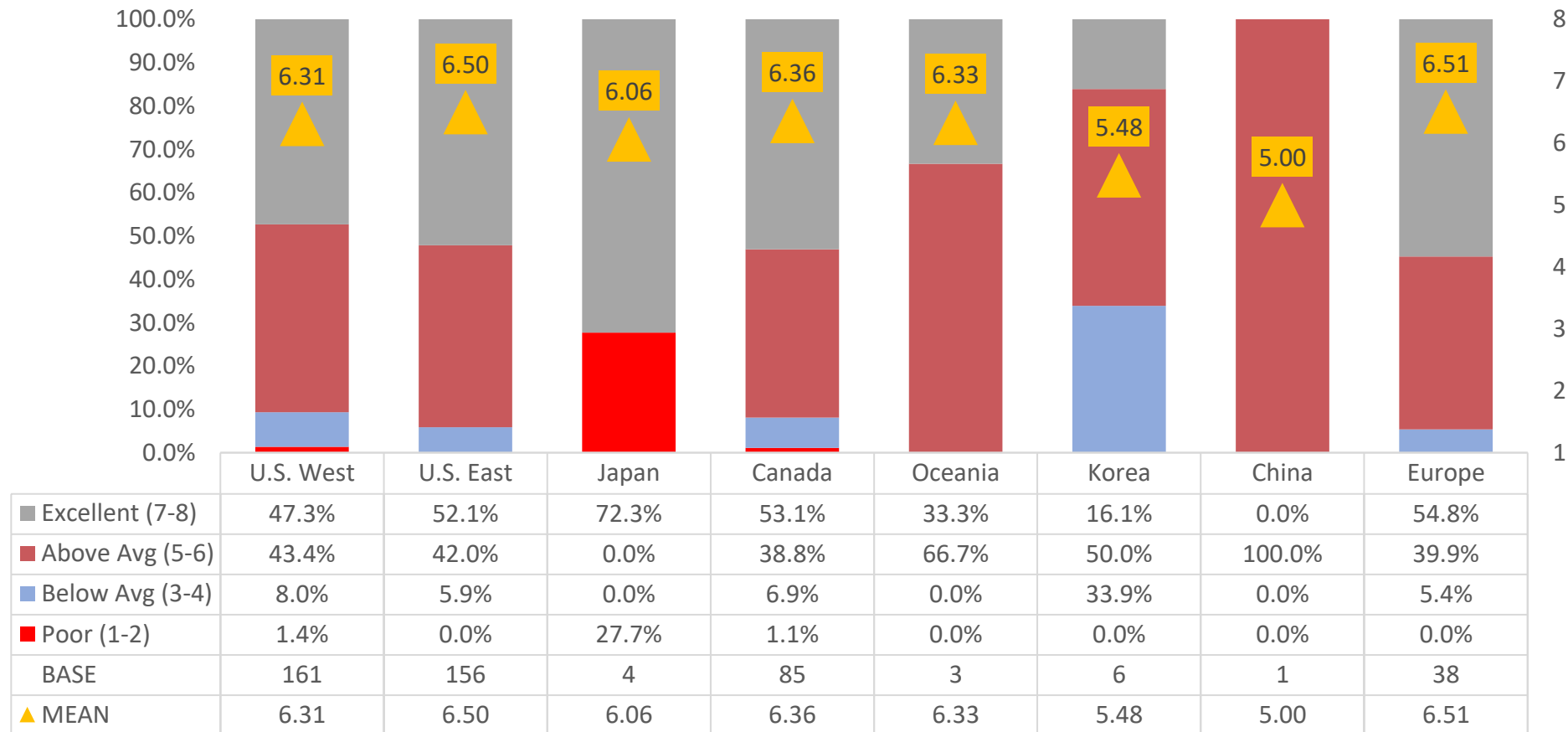
# ENTERTAINMENT/ ATTRACTIONS – KAUA‘I

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



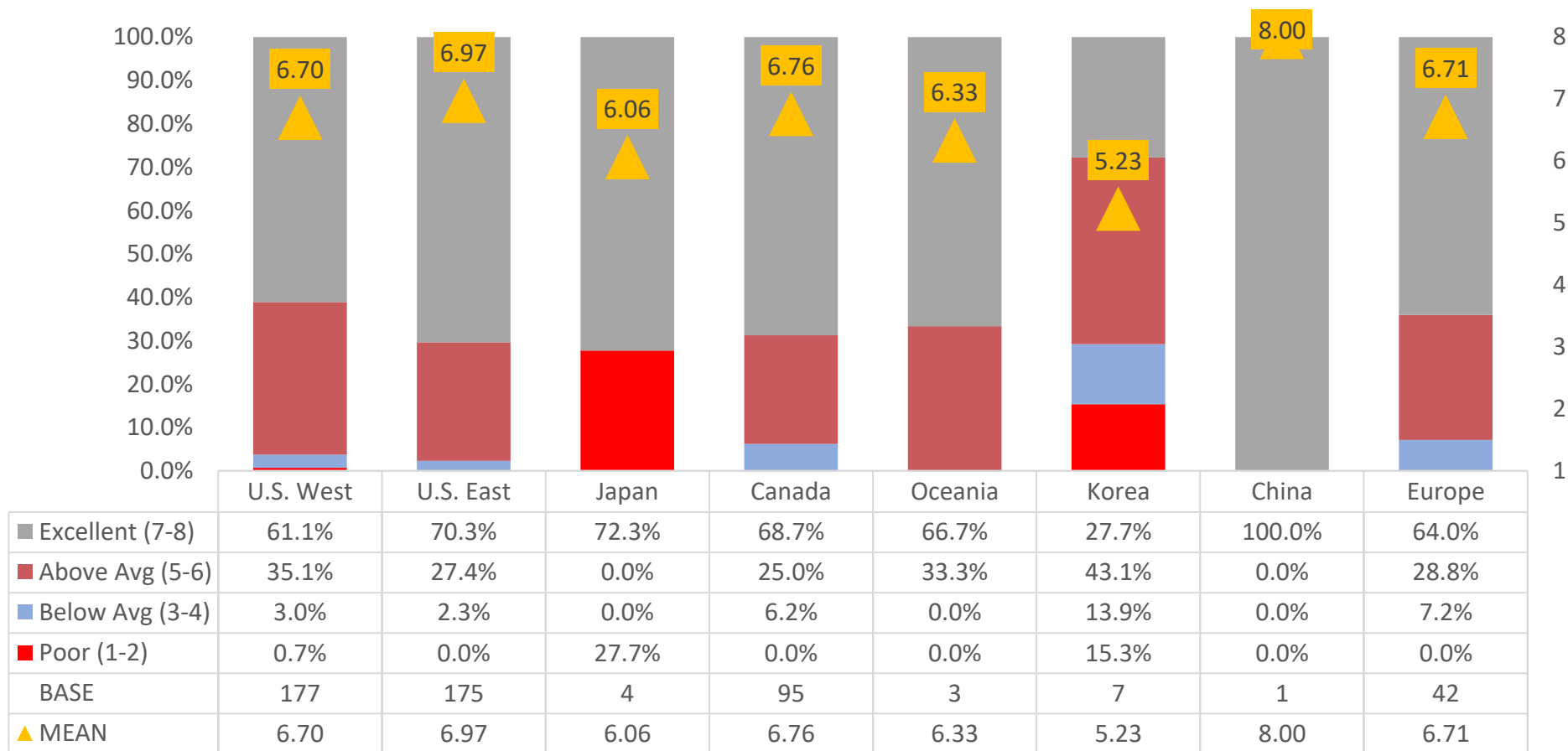
# SHOPPING - KAUA'I

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



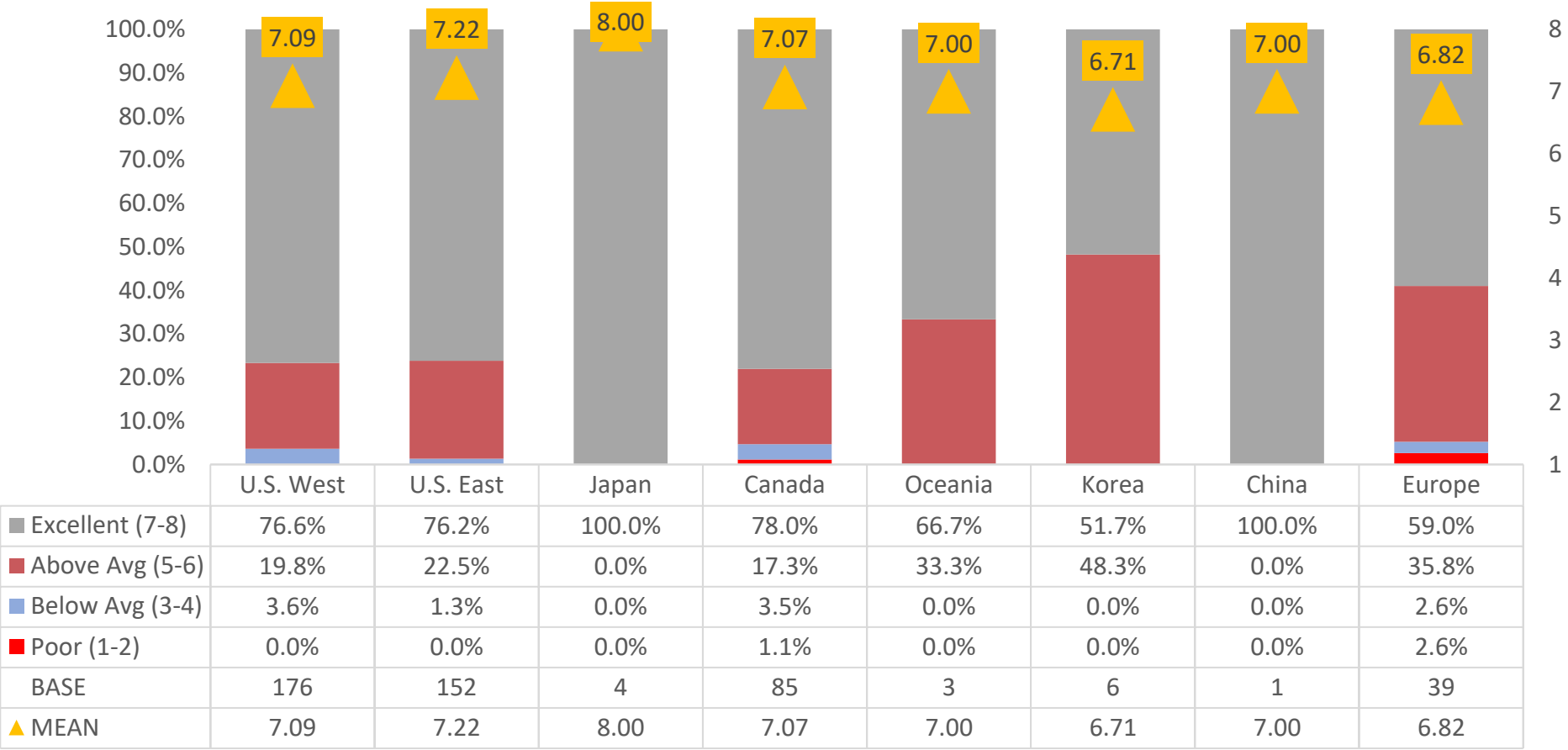
# DINING/ FOOD & BEVERAGE – KAUA‘I

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



# LODGING/ ACCOMMODATIONS – KAUA‘I

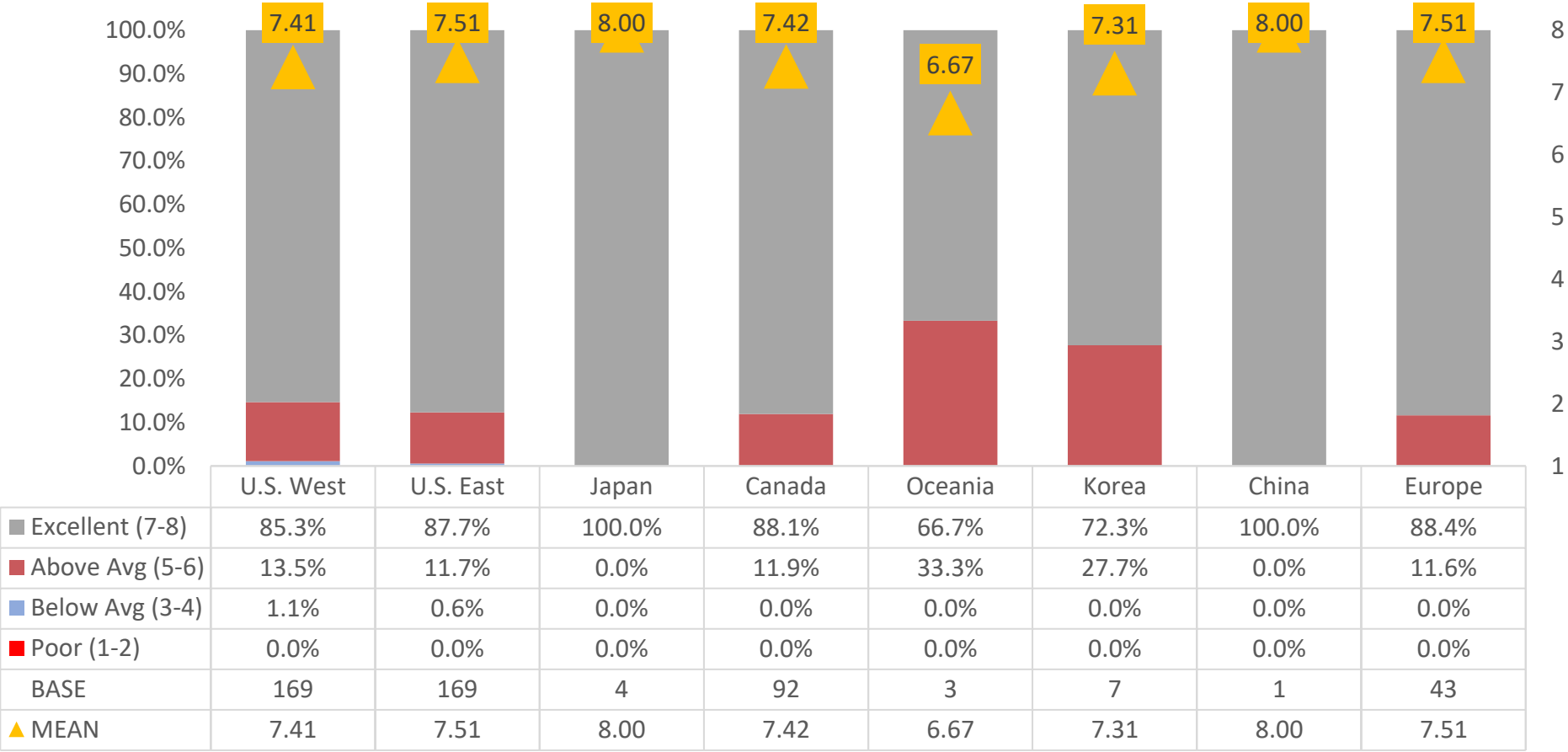
8-pt Rating Scale  
8 = Excellent / 1 = Poor





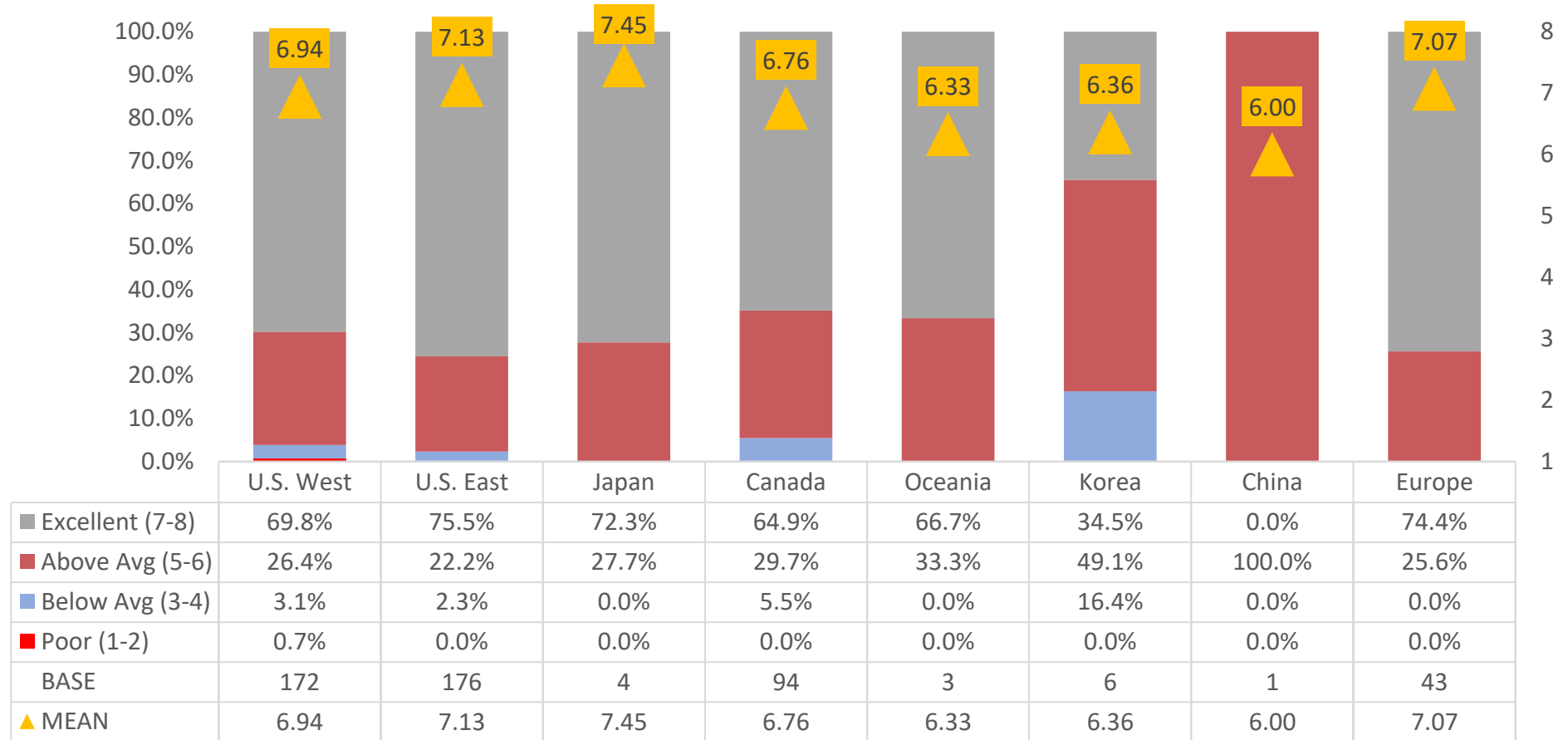
# BEACHES - KAUA'I

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



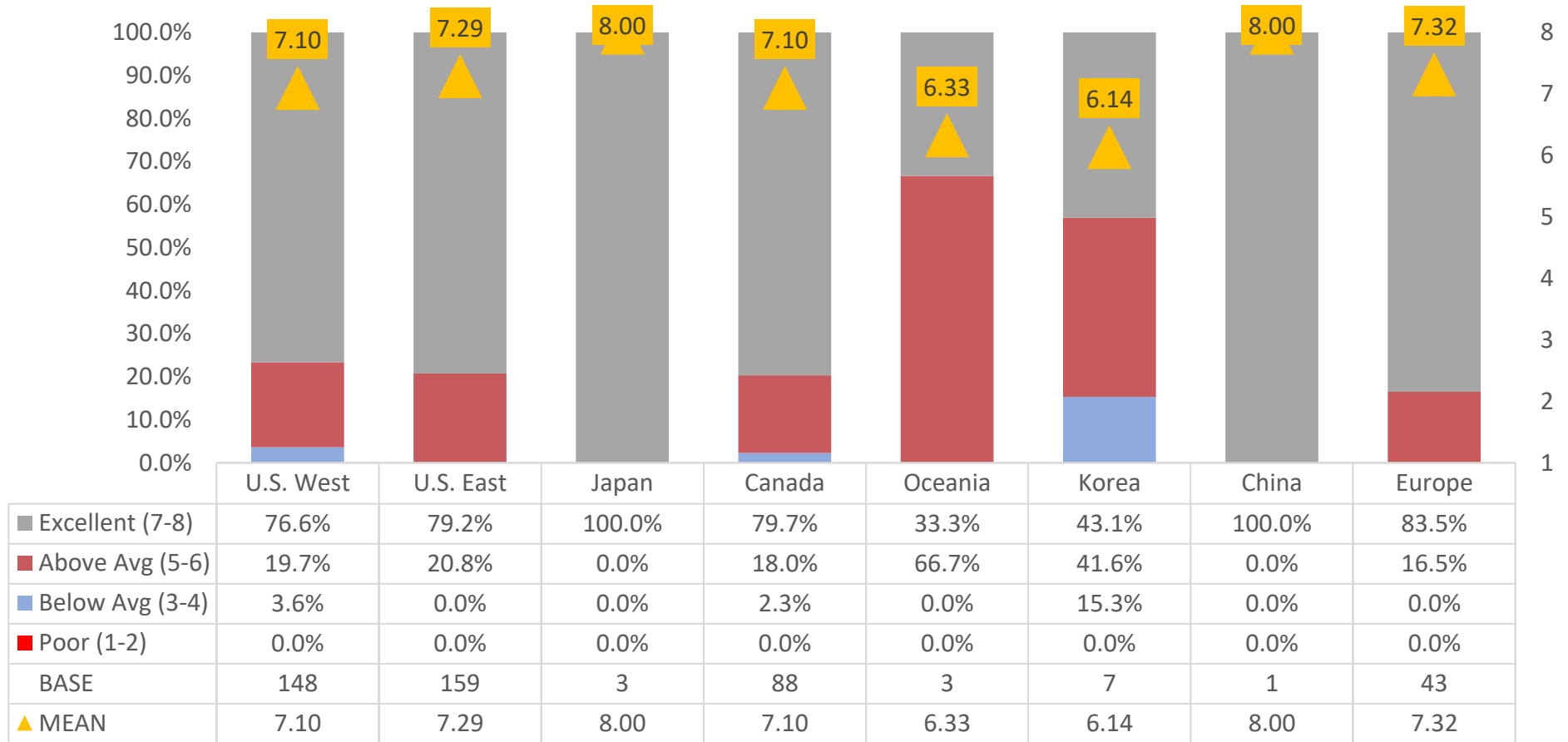
# PUBLIC AREAS - KAUA'I

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



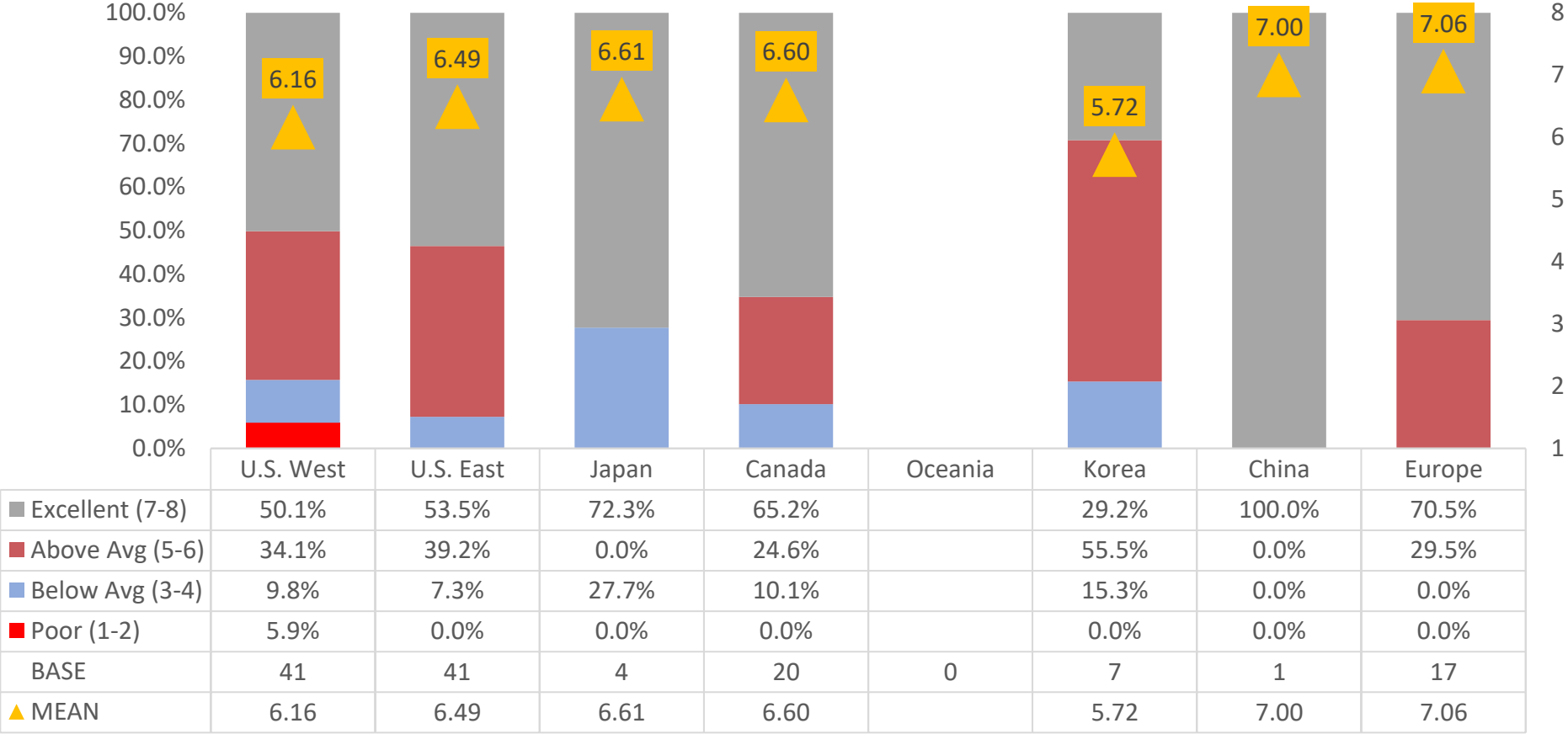
# PARKS - KAUAI

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



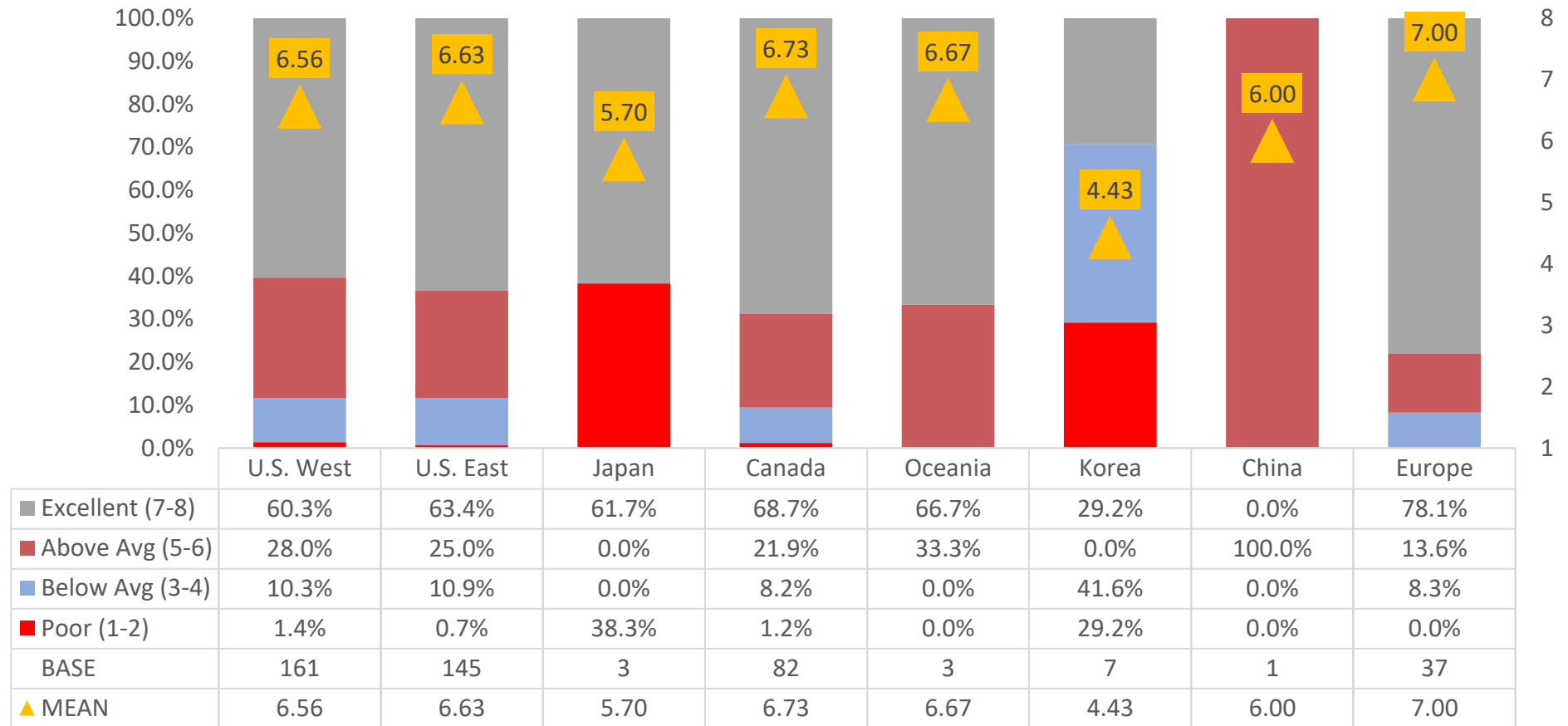
# ROADS – KAUAI

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



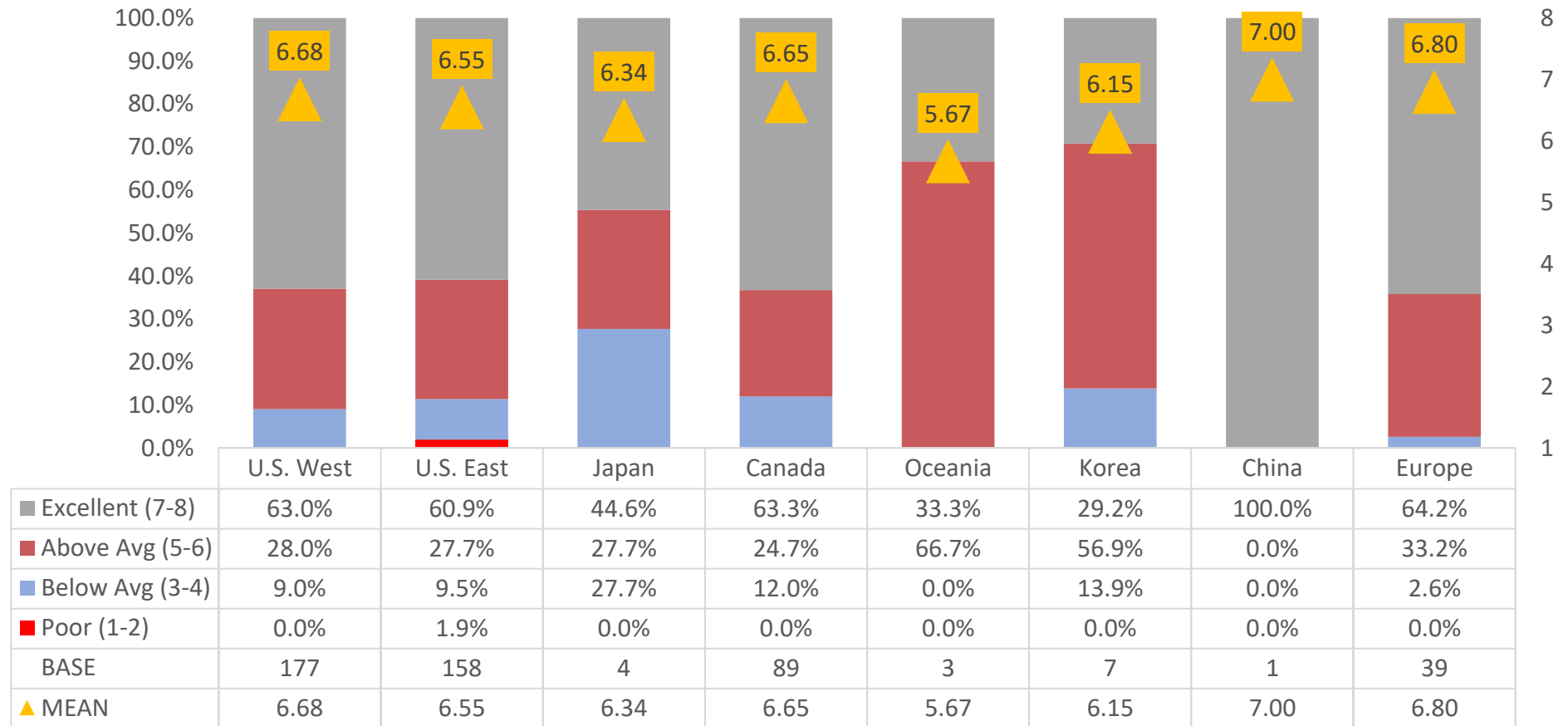
# TRANSPORTATION ON ISLAND - KAUA'I

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



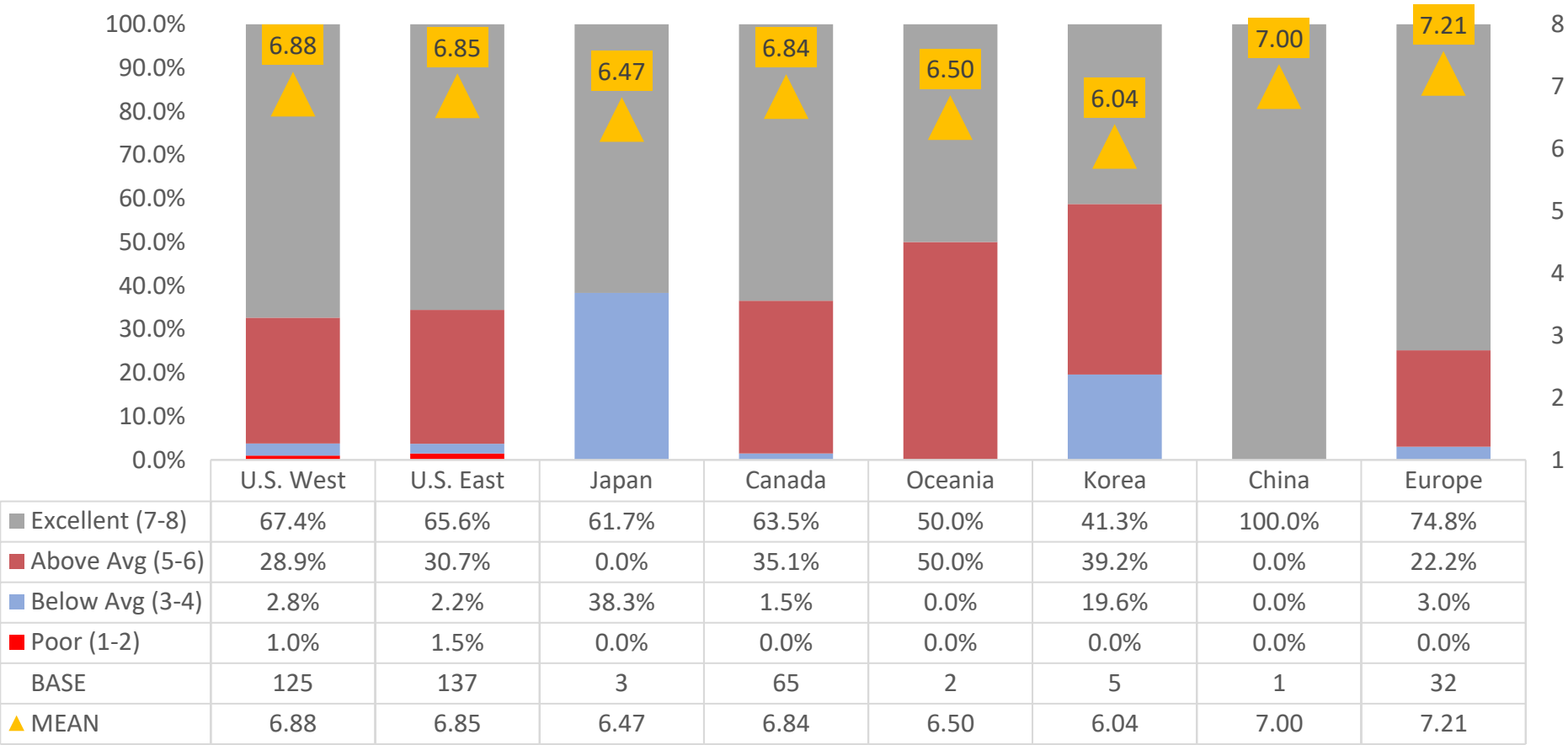
# AIRPORT- KAUA'I

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



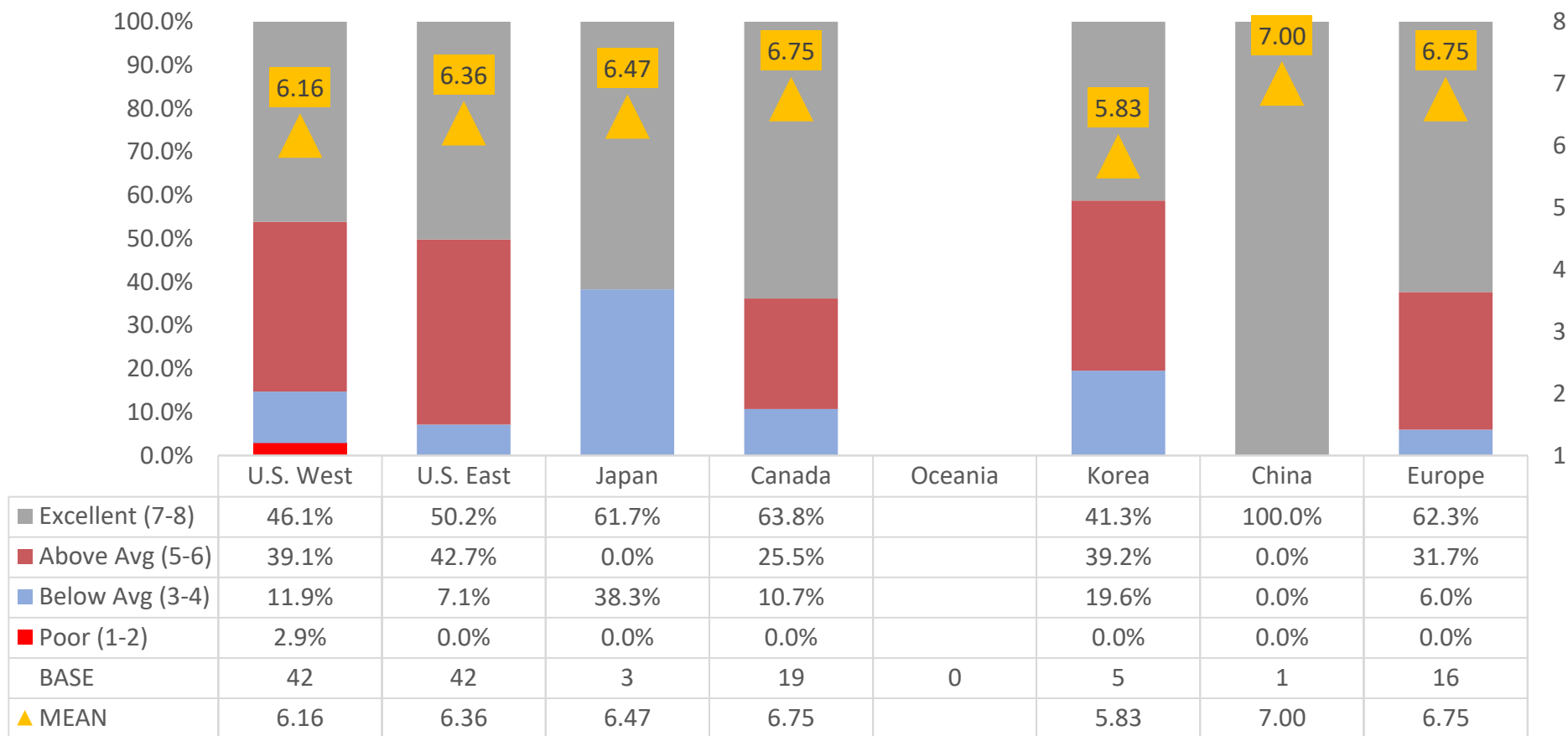
# CULTURAL ACTIVITIES - KAUA'I

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



# VOLUNTEER ACTIVITIES - KAUAI

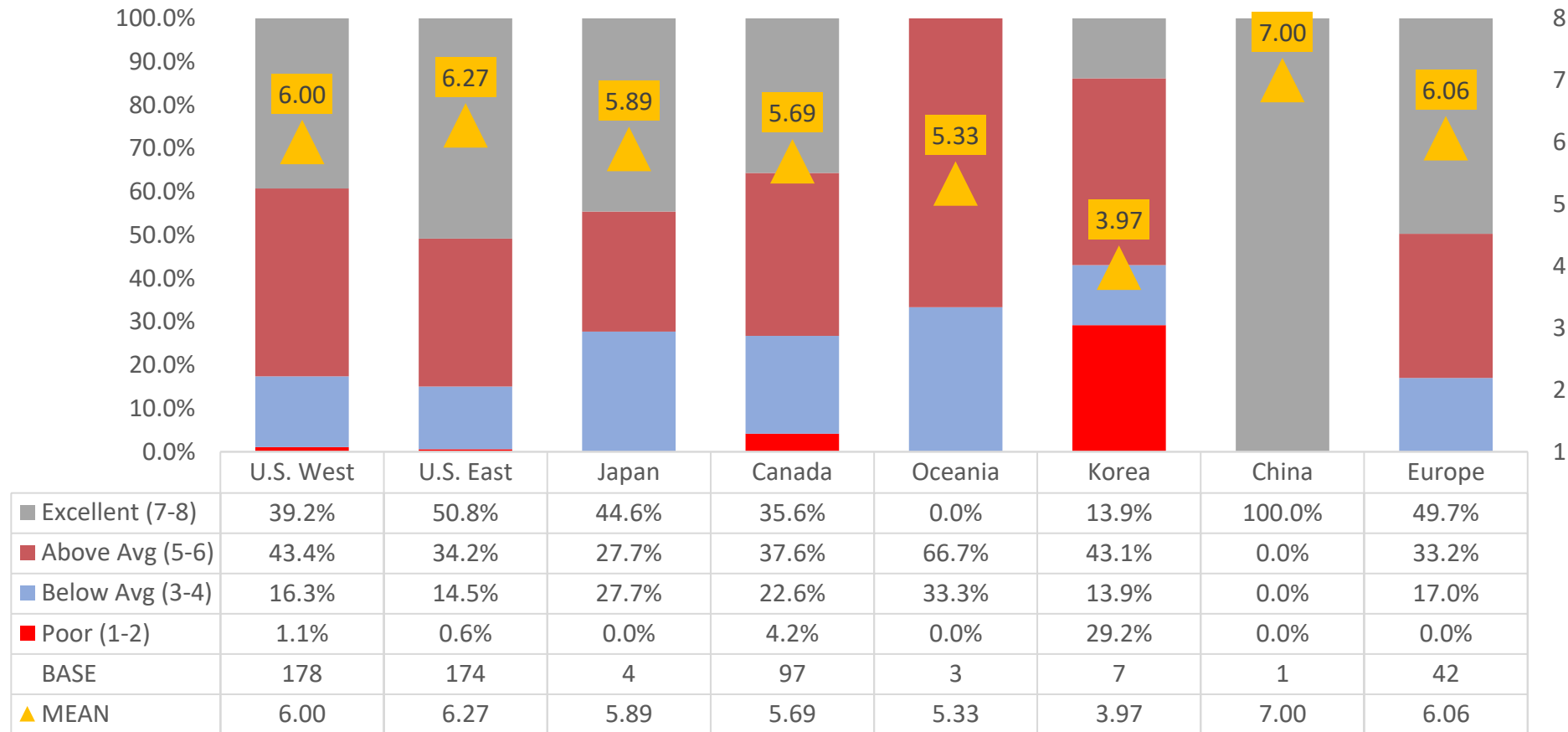
8-pt Rating Scale  
8 = Excellent / 1 = Poor





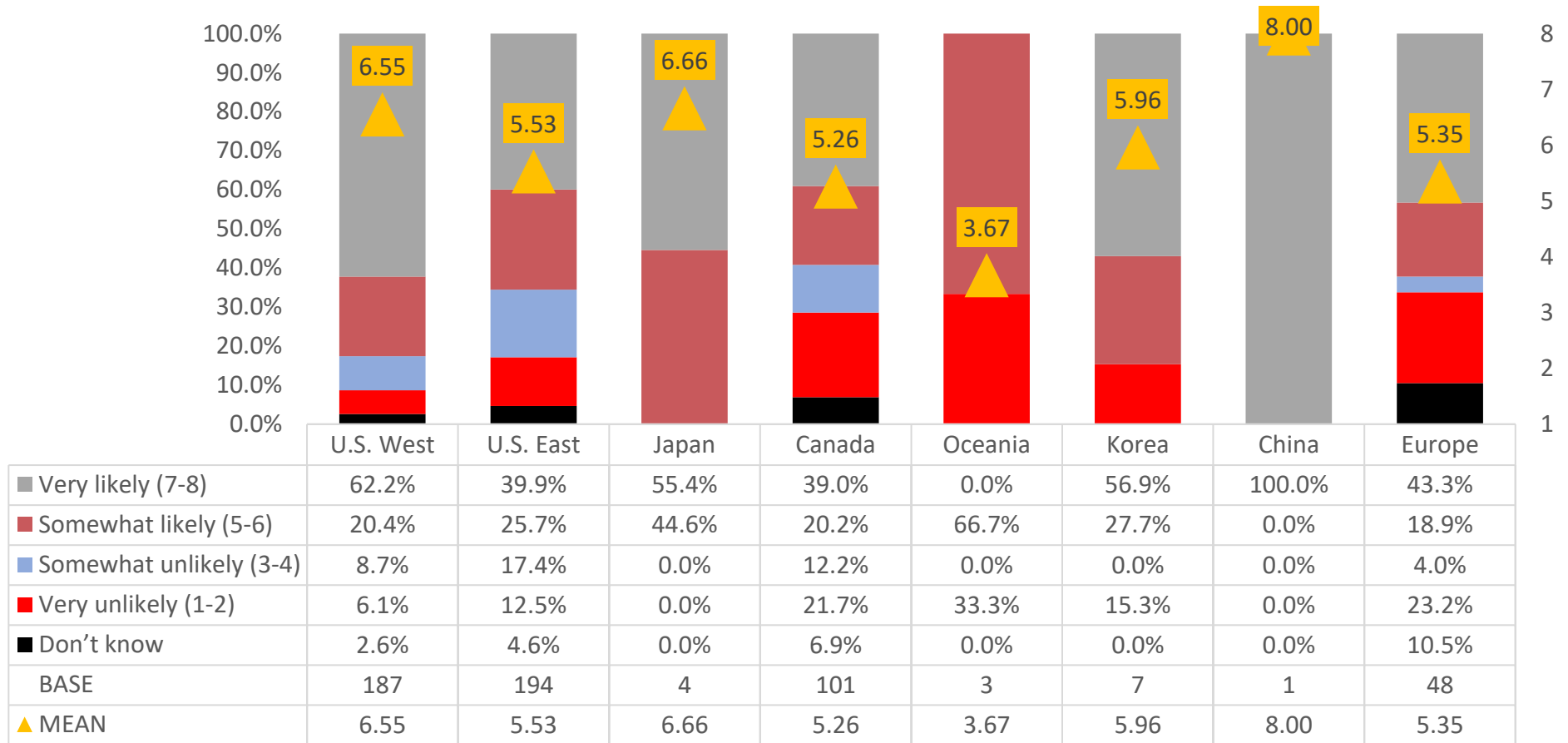
# VALUE FOR THE MONEY – KAUA‘I

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



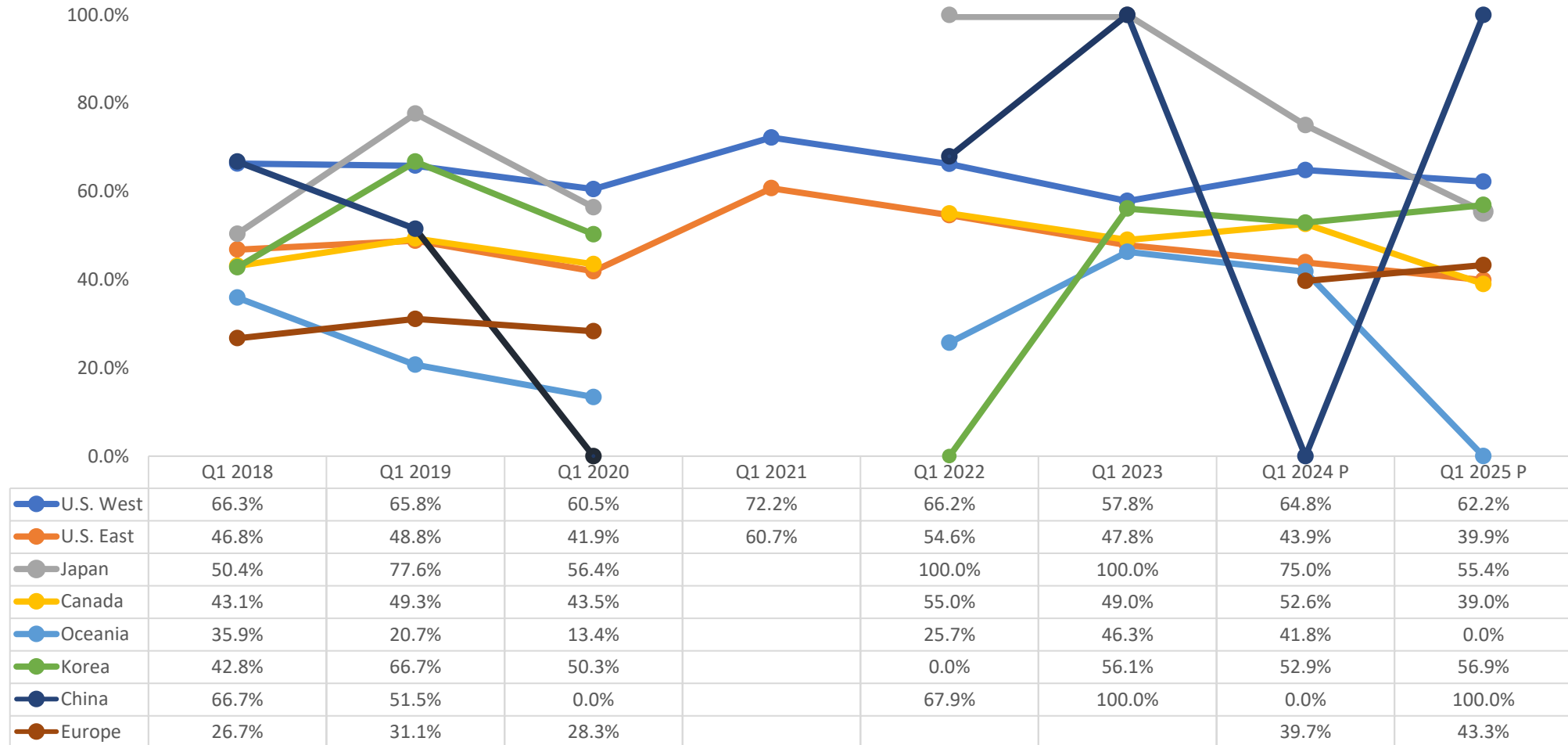
# LIKELIHOOD OF RETURN VISIT – KAUA‘I

8-pt Rating Scale  
8 = Very likely / 1 = Very unlikely



# LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

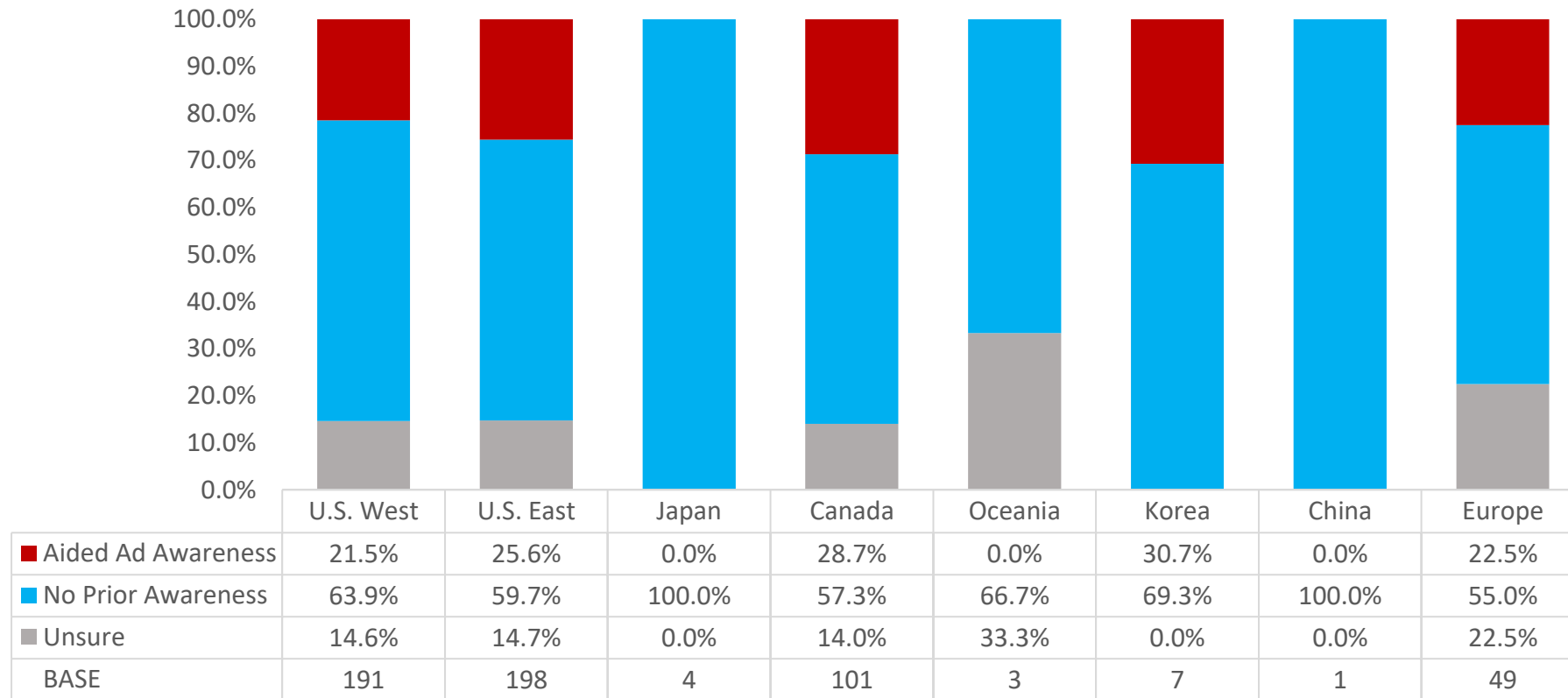


P= Preliminary Data

Q. How likely are you to visit Kaua'i again in the next five years?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

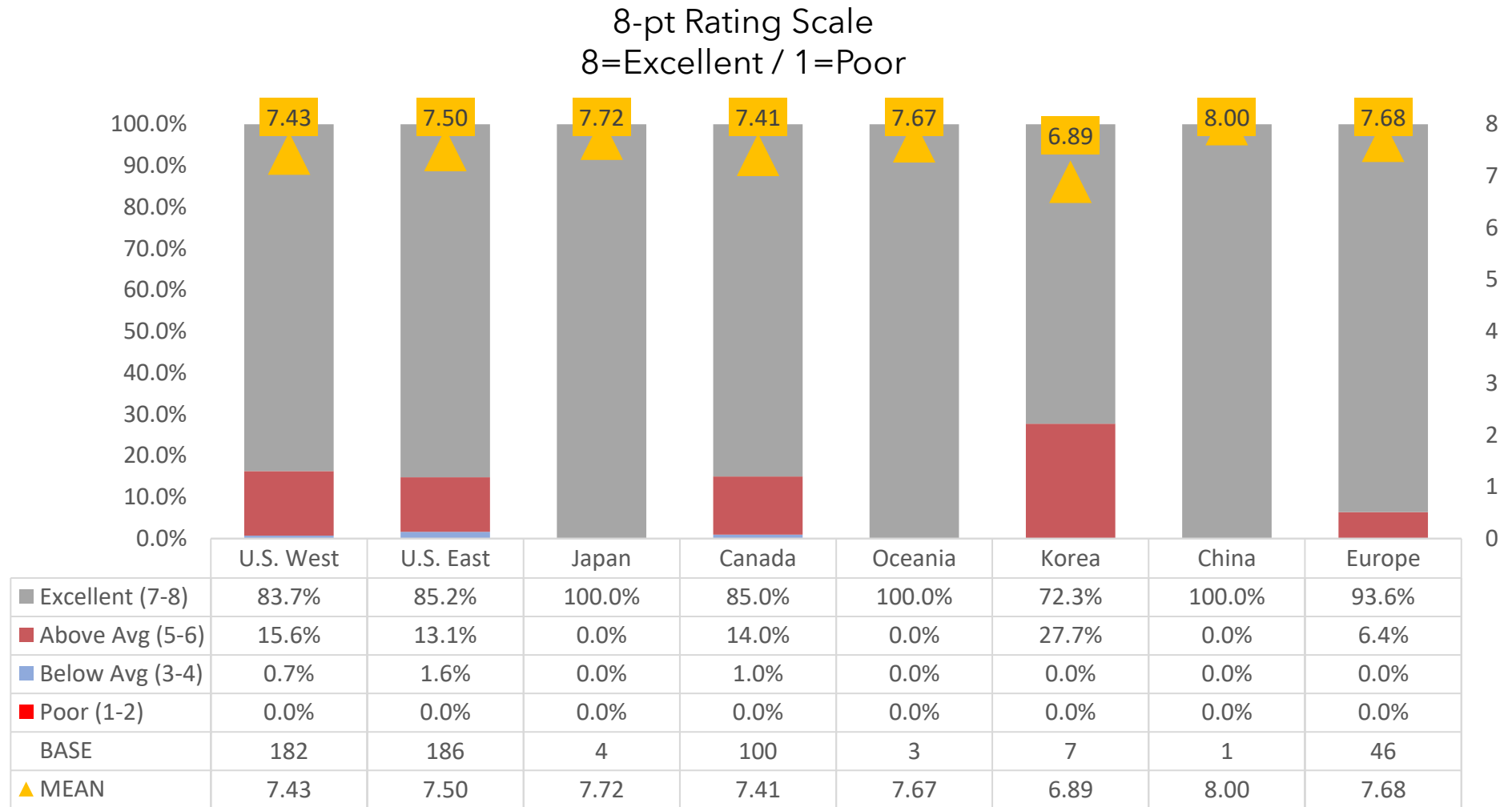
# AIDED ADVERTISING AWARENESS - KAUA'I



# MOTIVATING FACTORS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	48.9%	50.6%	83.1%	41.0%	33.3%	100.0%	56.9%	58.6%
<b>Outdoor or sporting activities and events</b>	14.0%	16.3%	27.7%	10.9%	33.3%	0.0%	0.0%	18.3%
<b>Social media posts and videos</b>	9.4%	13.4%	16.9%	21.8%	33.3%	0.0%	13.9%	10.4%
<b>Hawaiian cultural experiences and Hawaiian cultural events</b>	13.0%	19.4%	0.0%	15.8%	33.3%	0.0%	0.0%	12.2%
<b>Television programs or movies filmed in Hawai‘i</b>	5.5%	10.3%	27.7%	12.9%	33.3%	0.0%	0.0%	12.3%
<b>Hawaiian music</b>	7.3%	7.1%	0.0%	7.0%	0.0%	0.0%	0.0%	6.0%
<b>Attend a festival or other event</b>	2.7%	5.6%	0.0%	3.0%	0.0%	0.0%	29.2%	0.0%
<b>BASE</b>	190	195	4	101	3	1	7	49

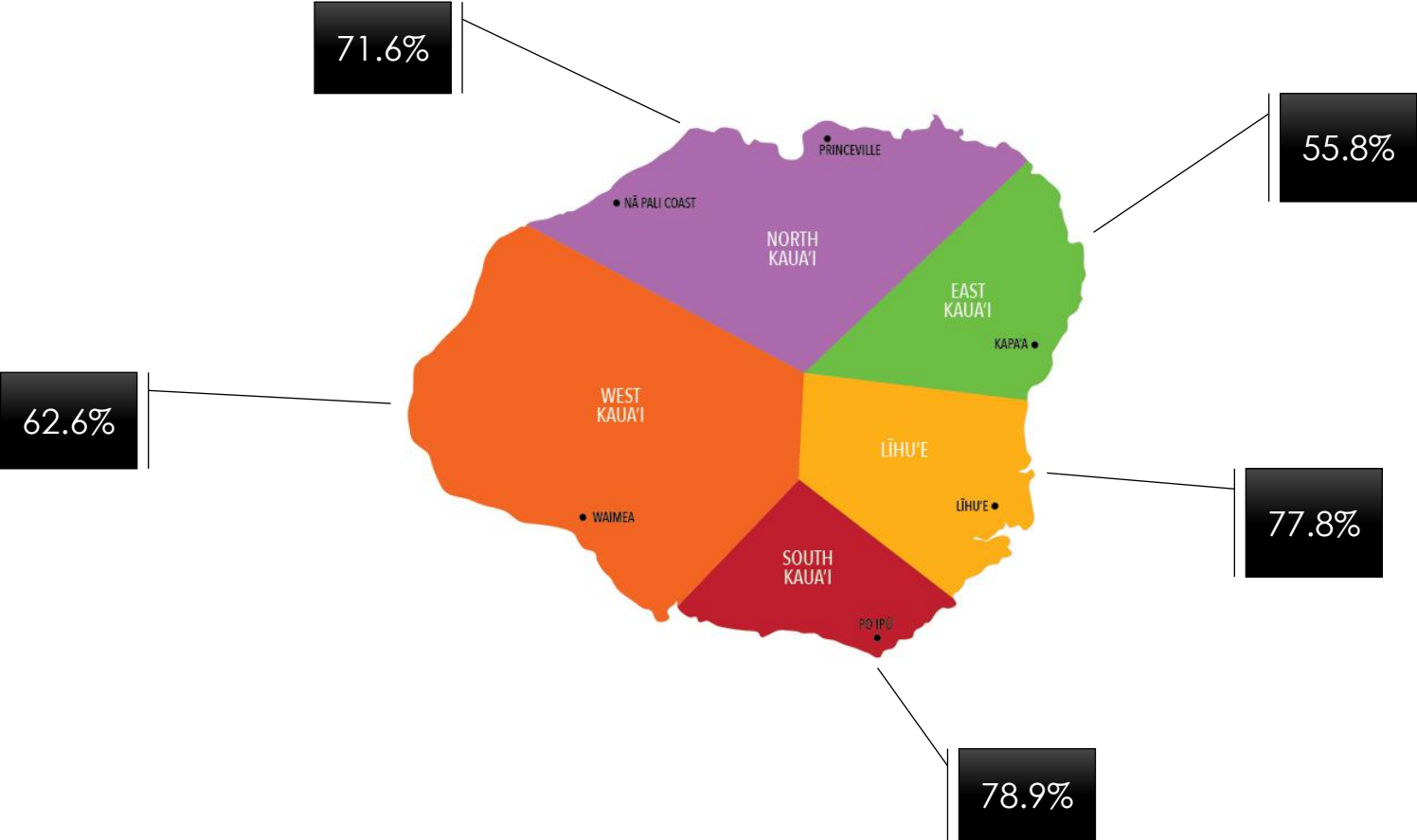
# FRIENDLINESS OF KAUA'I RESIDENTS



# TOP TRIP INFLUENCERS – KAUA‘I

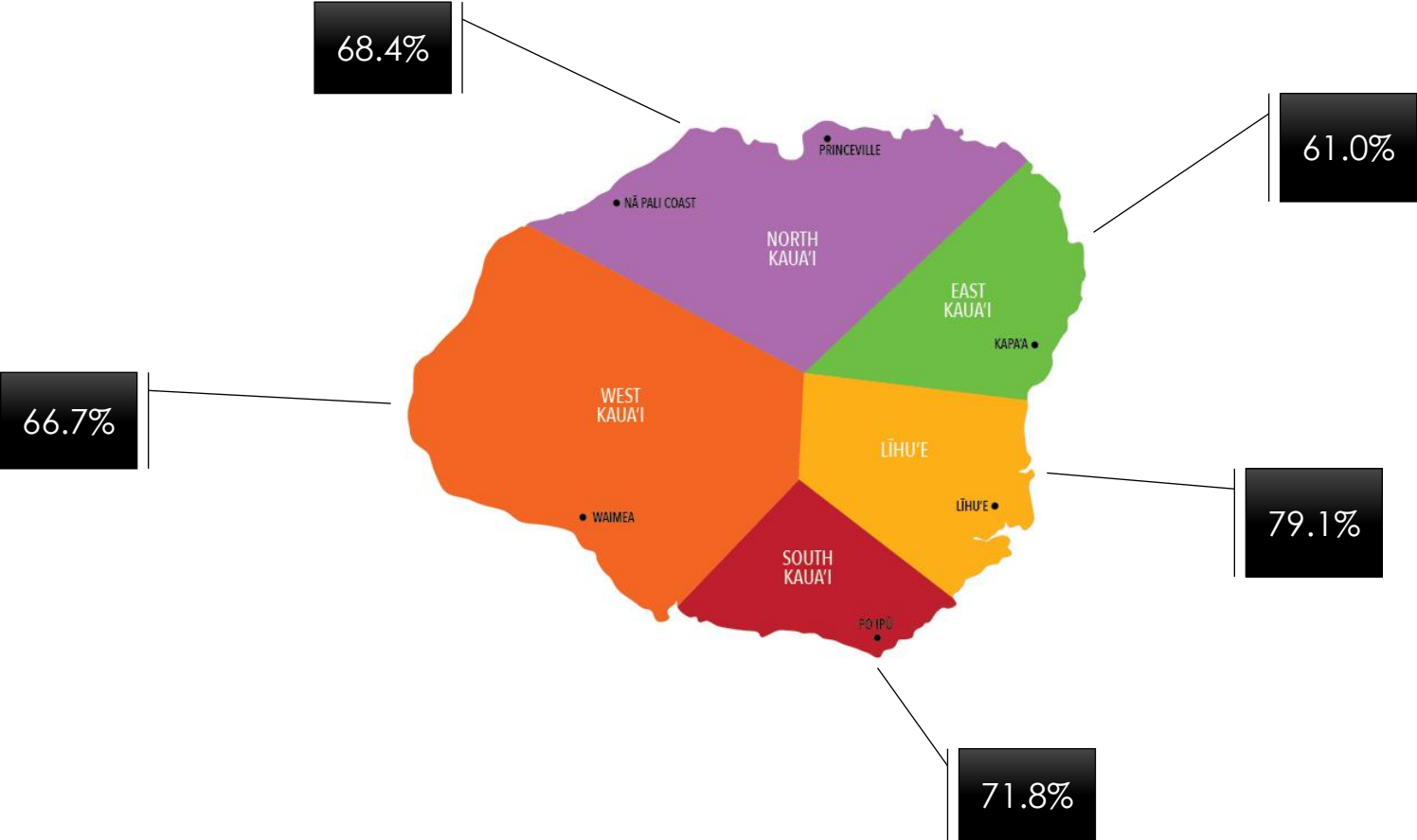
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	46.6%	26.0%	27.7%	31.6%	0.0%	100.0%	0.0%	24.1%
Friend recommendation	29.7%	28.4%	0.0%	22.9%	66.7%	0.0%	27.7%	43.6%
Cruise line stop/part of tour	1.1%	12.9%	0.0%	13.9%	0.0%	0.0%	0.0%	9.2%
Attending Conference/ Event	5.9%	6.1%	27.7%	3.0%	0.0%	0.0%	29.2%	2.3%
Location/ Never been, but went to other islands	2.2%	3.8%	0.0%	7.1%	0.0%	0.0%	0.0%	2.3%
Social Media Post	1.6%	3.3%	27.7%	6.1%	0.0%	0.0%	15.3%	2.3%
Article/ Blog	2.6%	3.9%	0.0%	1.1%	0.0%	0.0%	13.9%	2.3%
Visiting Family/ Friends	2.3%	3.3%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%

# AREAS VISITED KAUA'I U.S. WEST

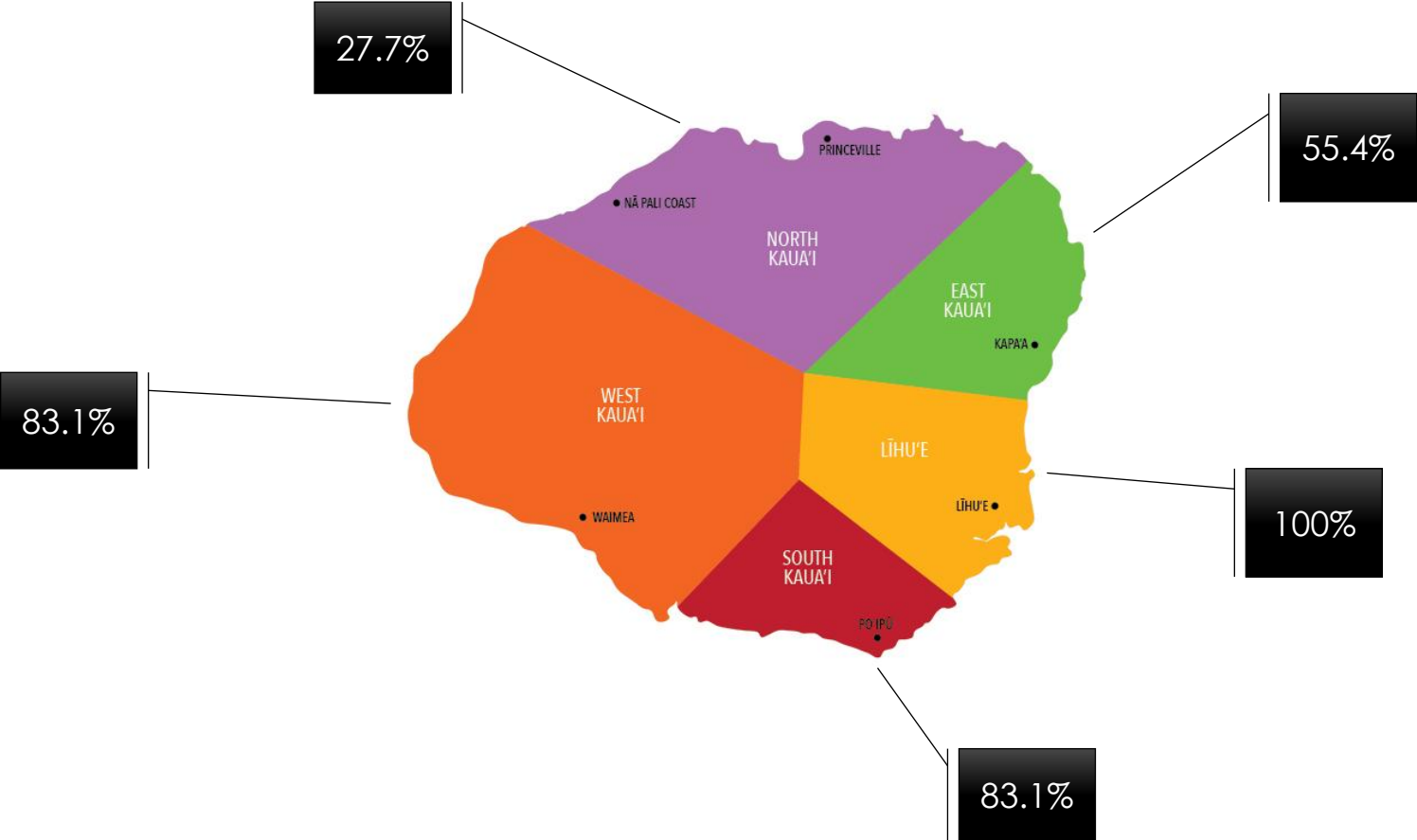




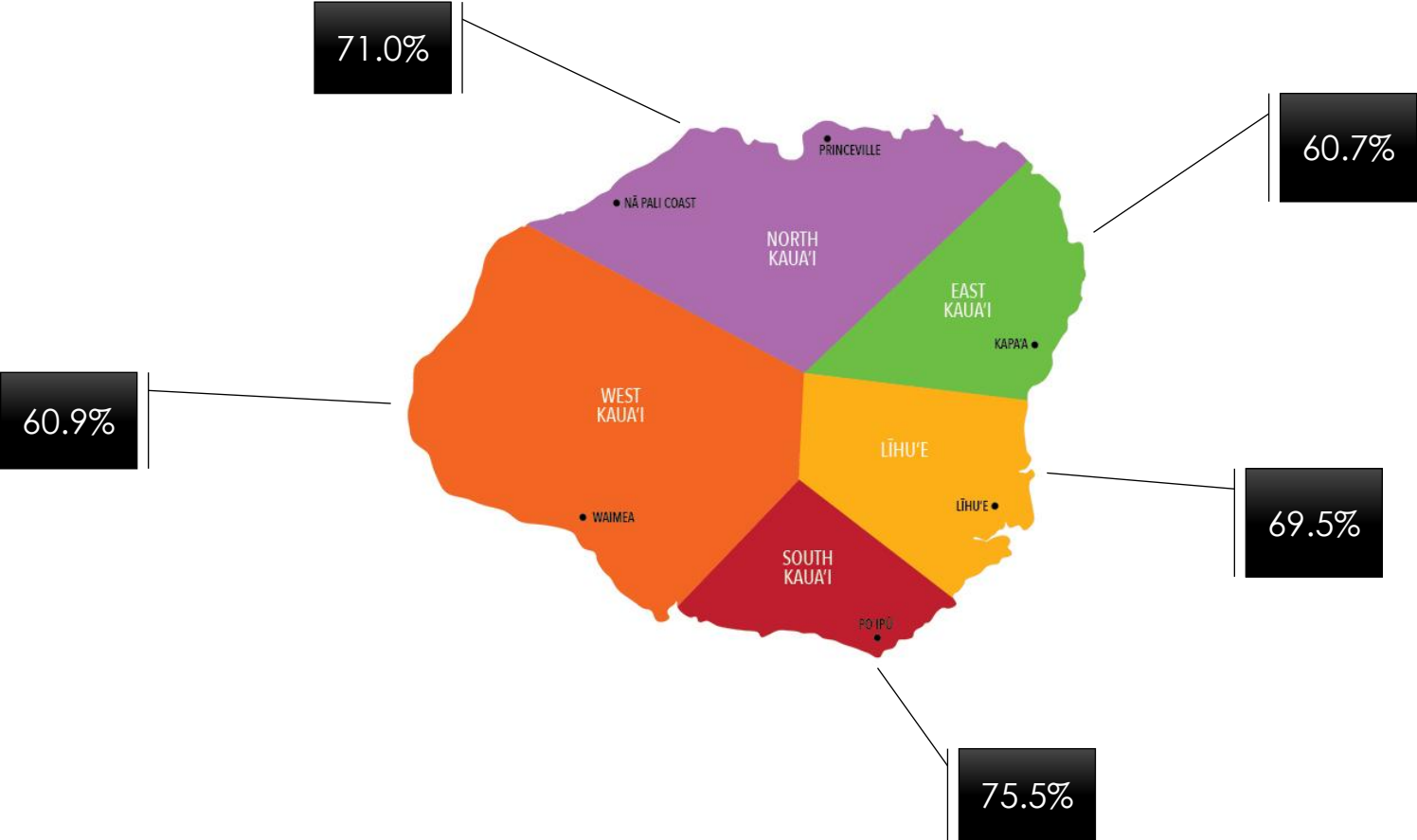
# AREAS VISITED KAUAʻI U.S. EAST



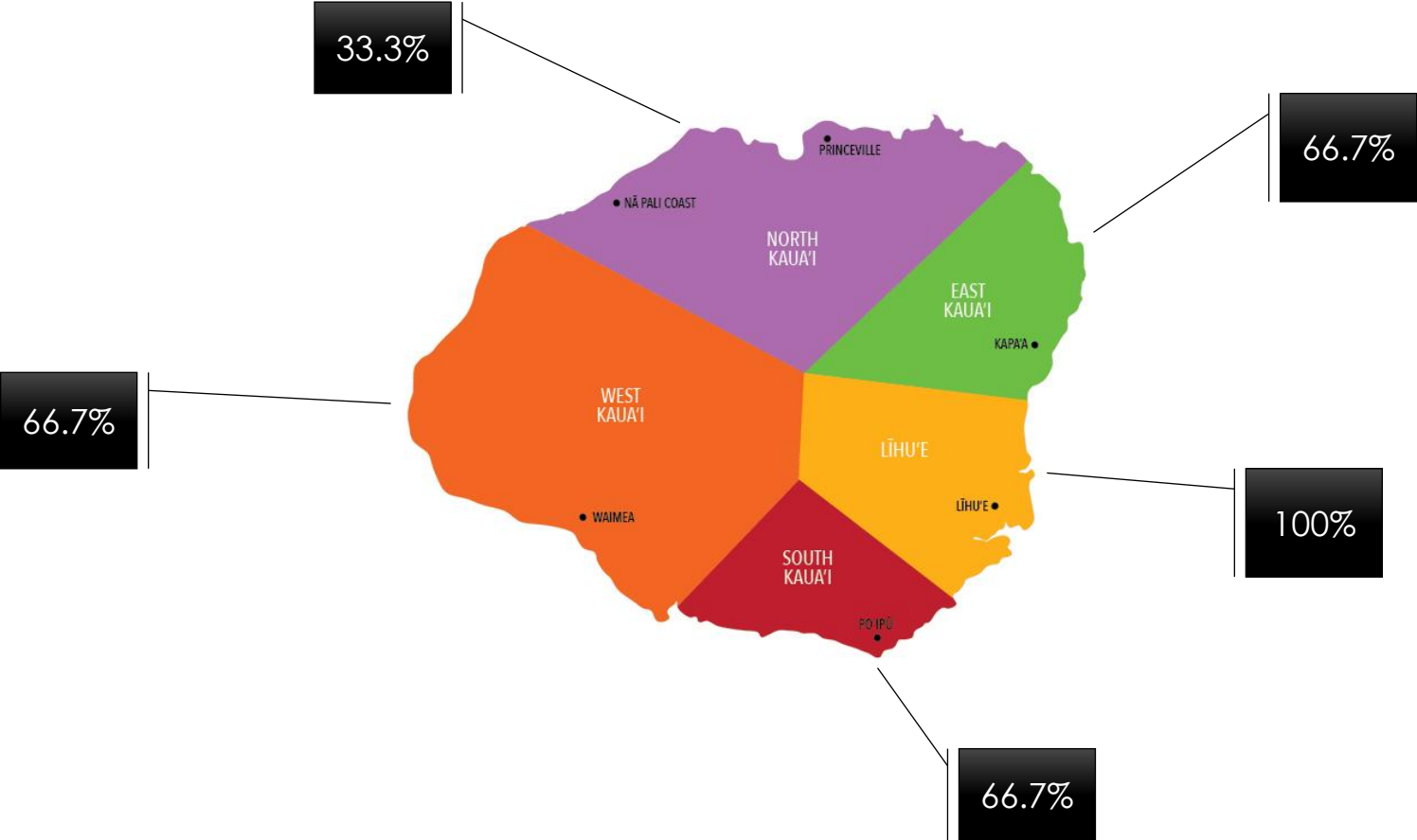
# AREAS VISITED KAUA'I JAPAN



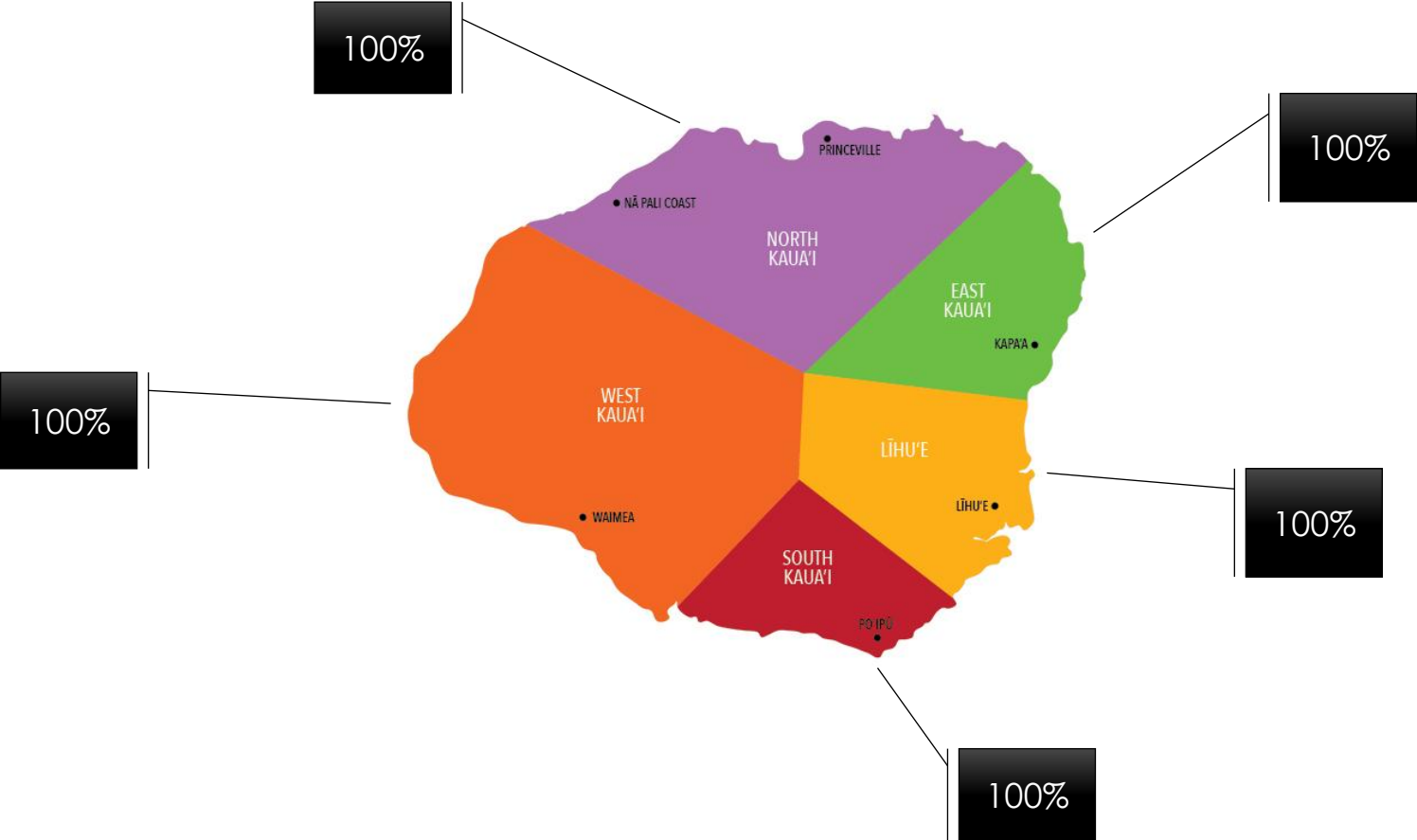
# AREAS VISITED KAUA'I CANADA



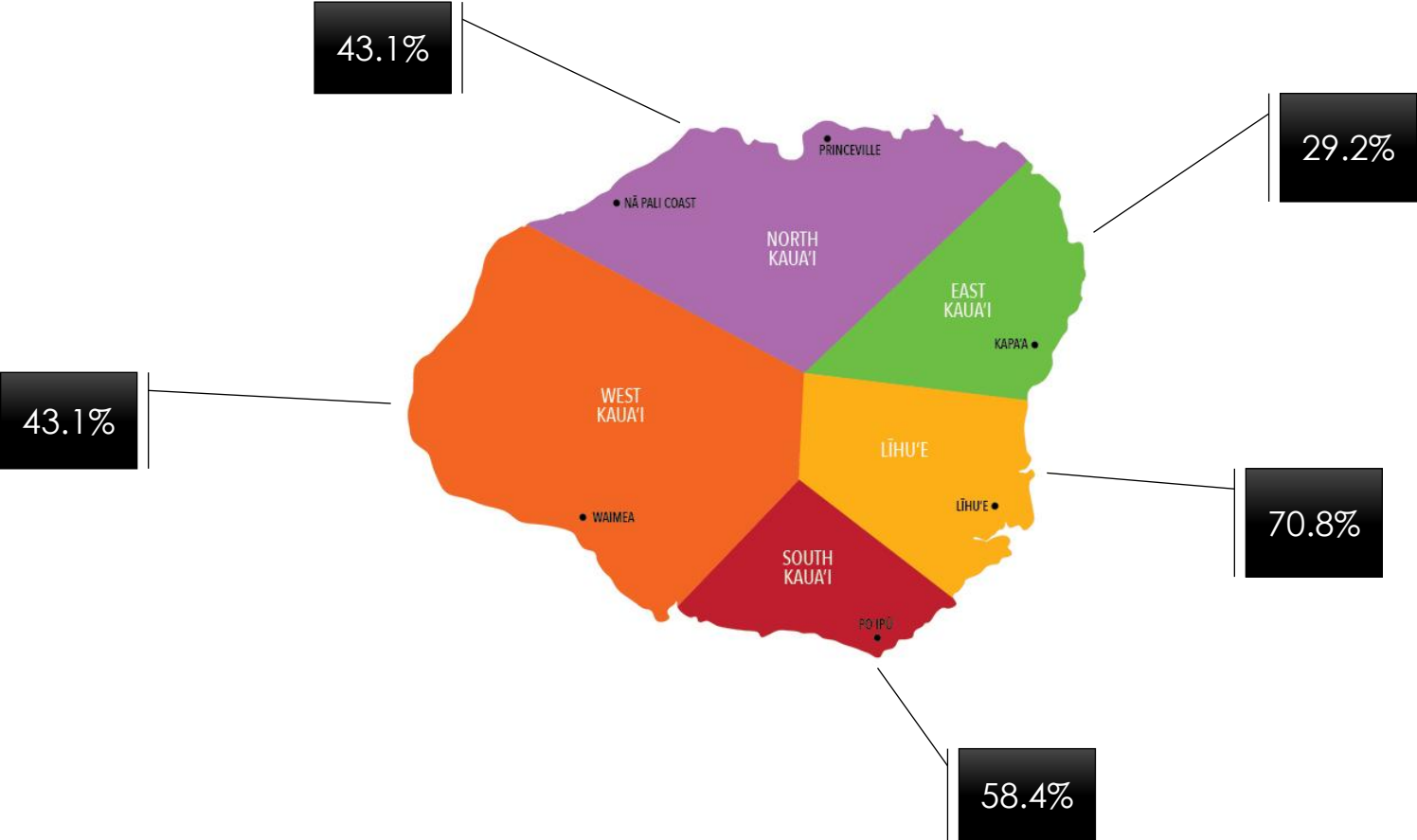
# AREAS VISITED KAUA'I OCEANIA



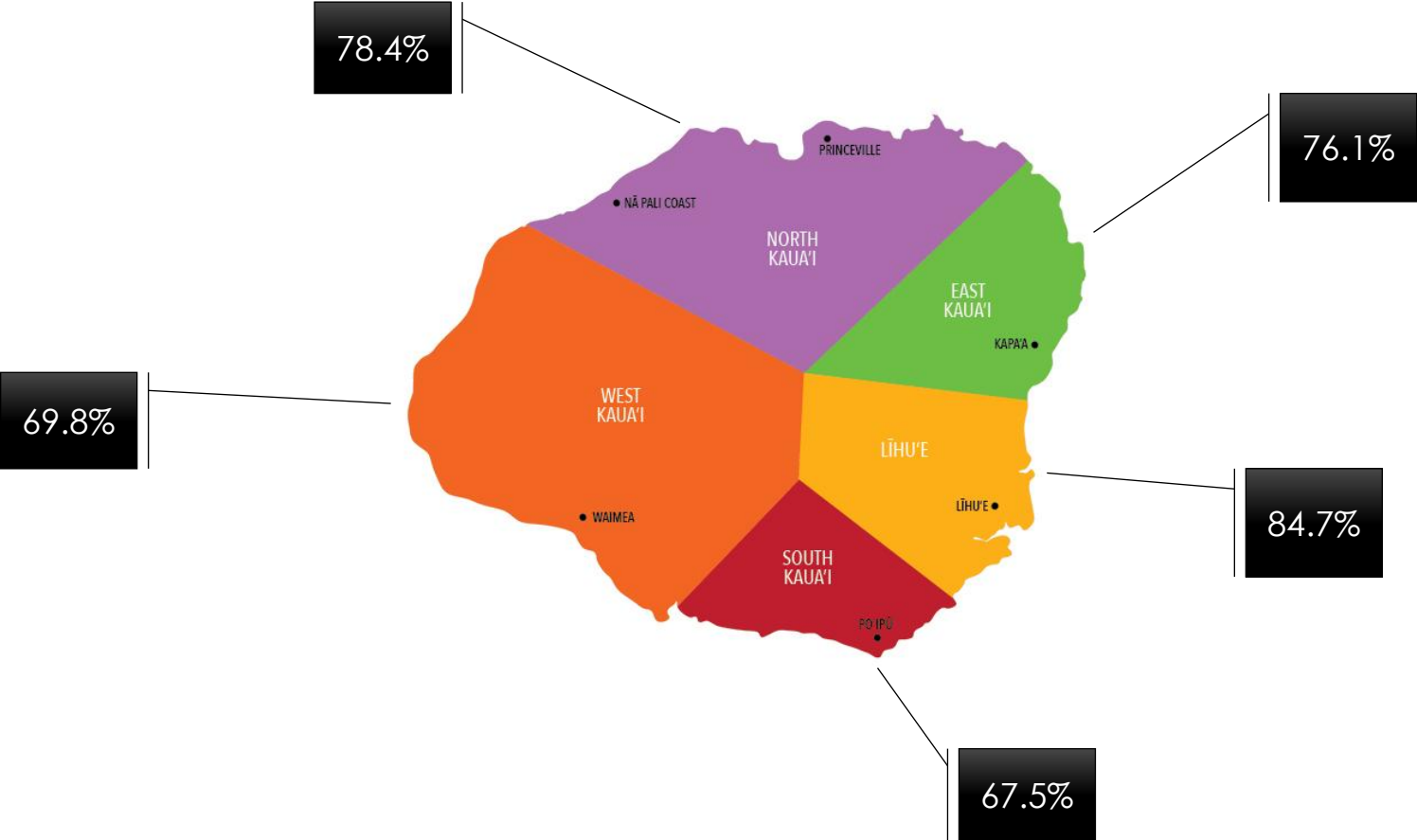
# AREAS VISITED KAUA'I CHINA



# AREAS VISITED KAUA'I KOREA



# AREAS VISITED KAUA'I EUROPE

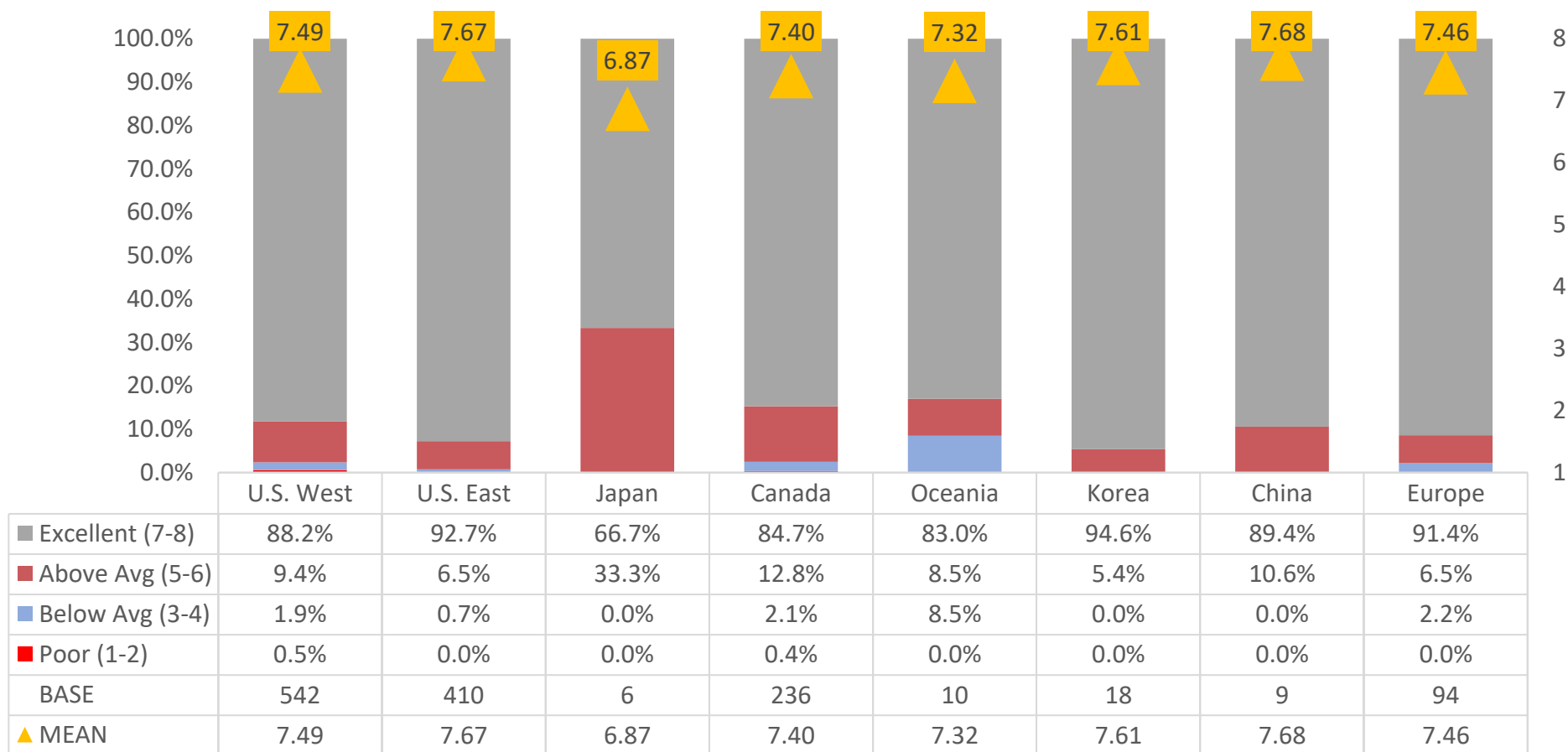


# Section 9 – Maui



# SATISFACTION - MAUI

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

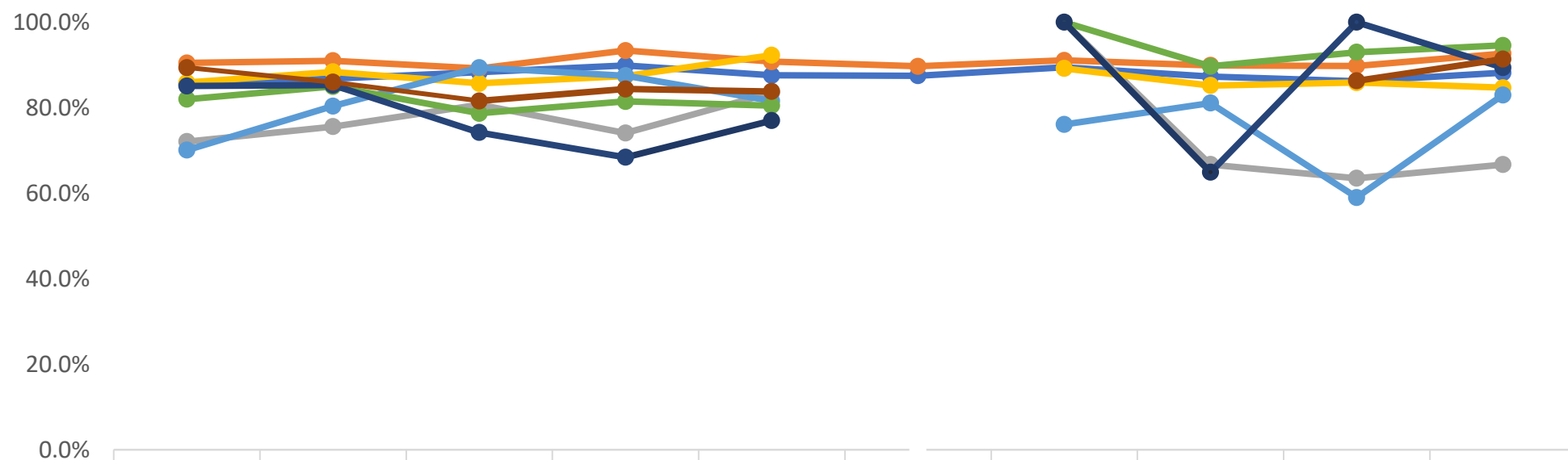


# SATISFACTION – MAUI

- **Gender:** Female respondents from **U.S. East** give higher satisfaction scores than male respondents.
- **Education:** Those with a college degree from **U.S. East** are more satisfied with their stay than those without a college degree from this visitor market.

# SATISFACTION - MAUI

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



P= Preliminary Data

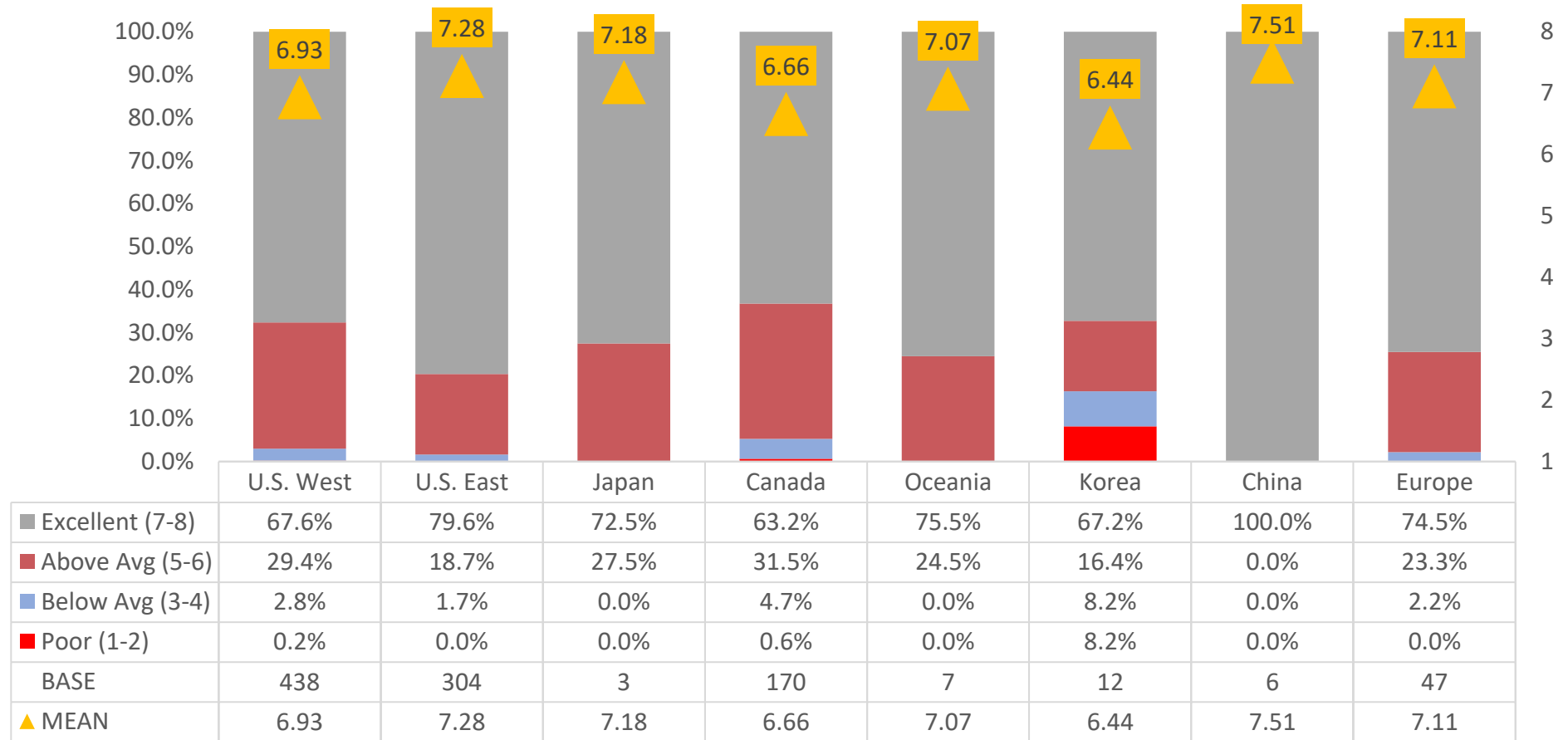
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



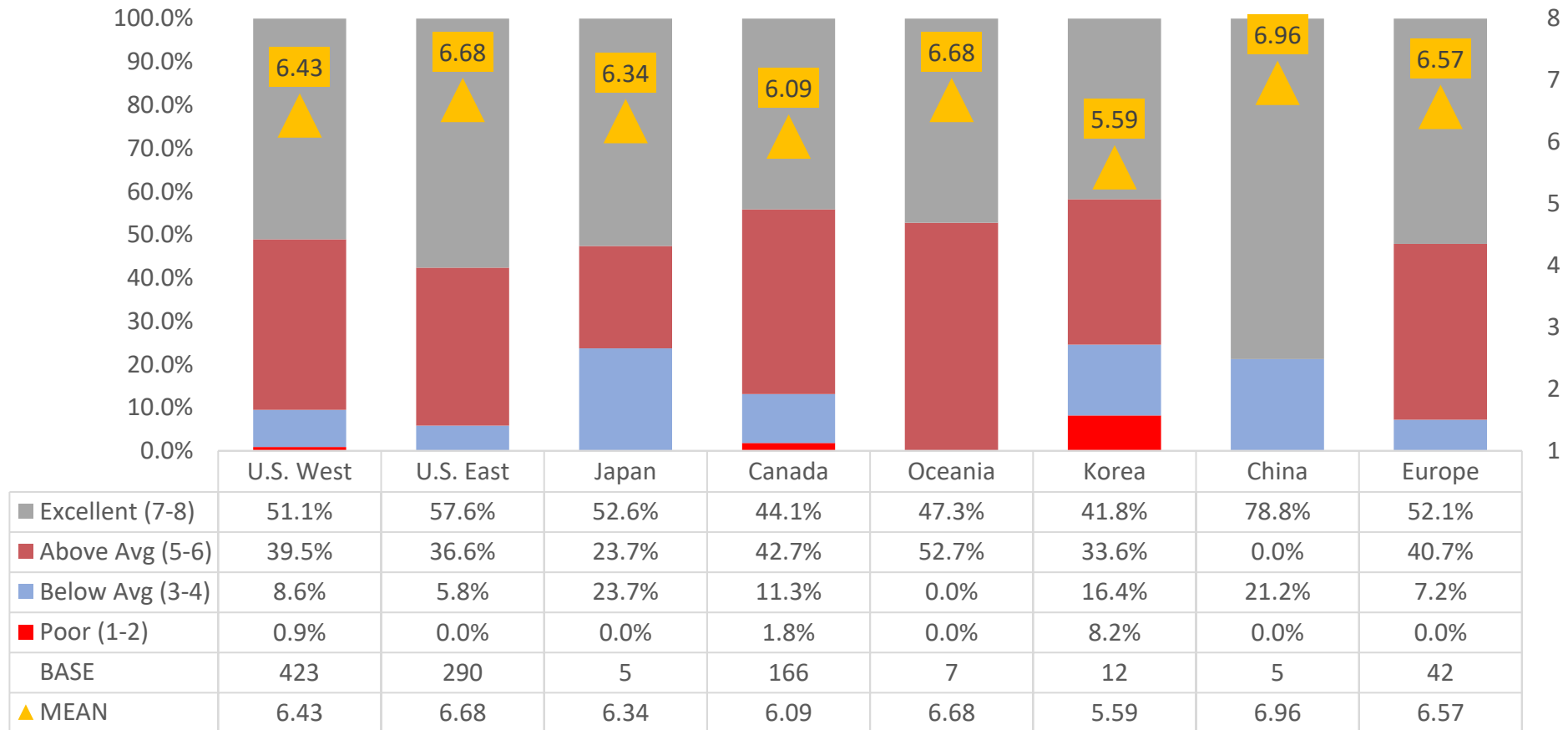
# ENTERTAINMENT/ ATTRACTIONS - MAUI

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



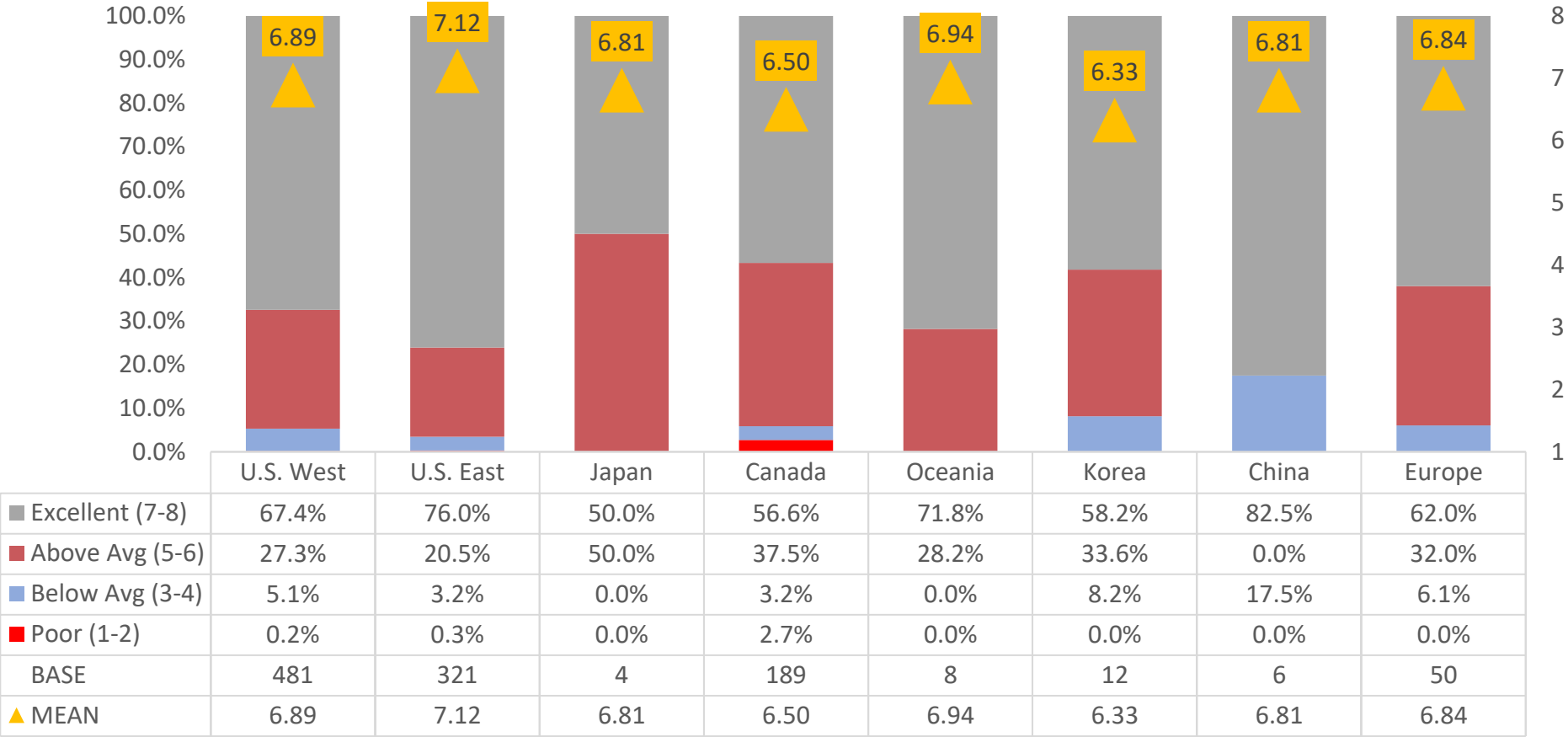
# SHOPPING - MAUI

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



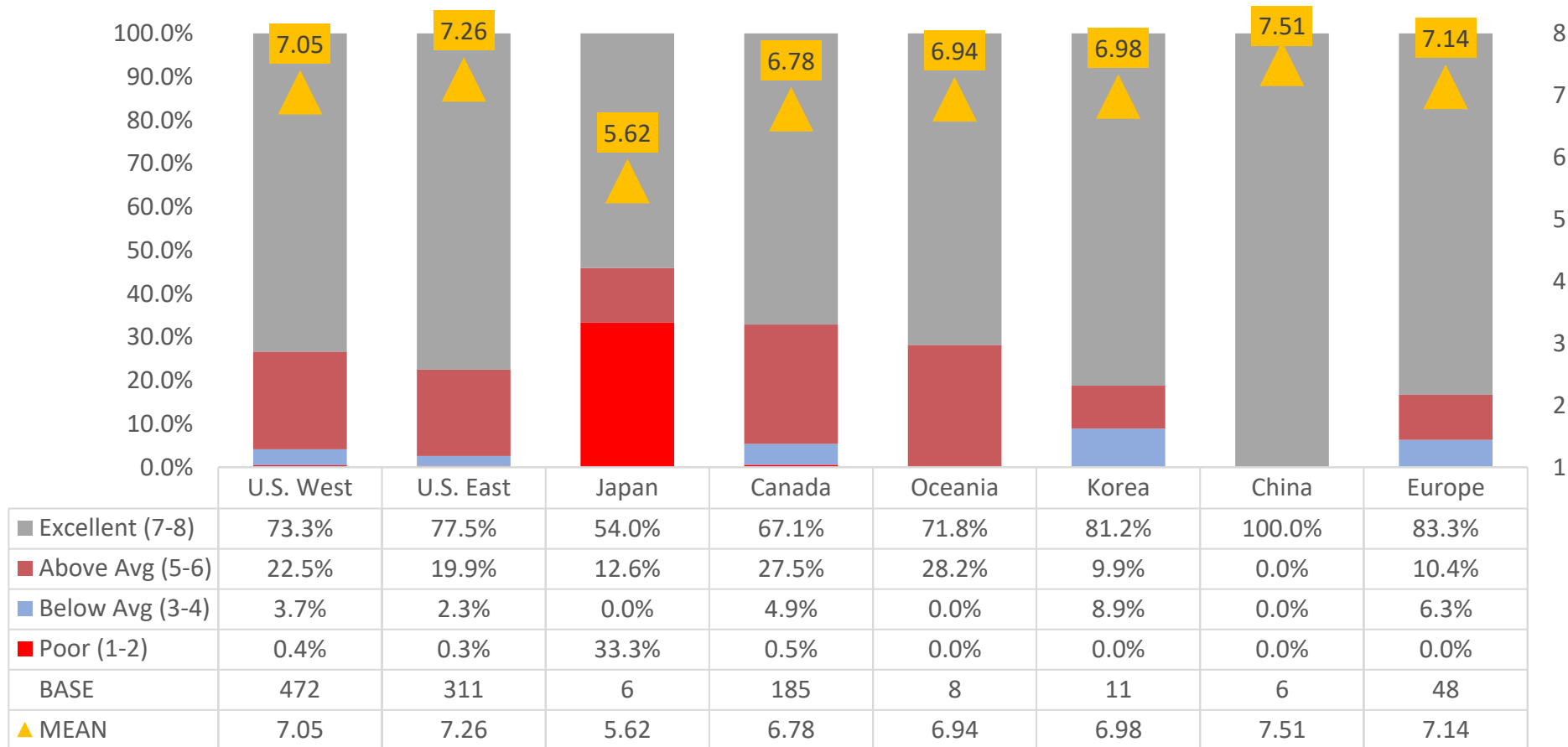
# DINING/ FOOD & BEVERAGE - MAUI

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



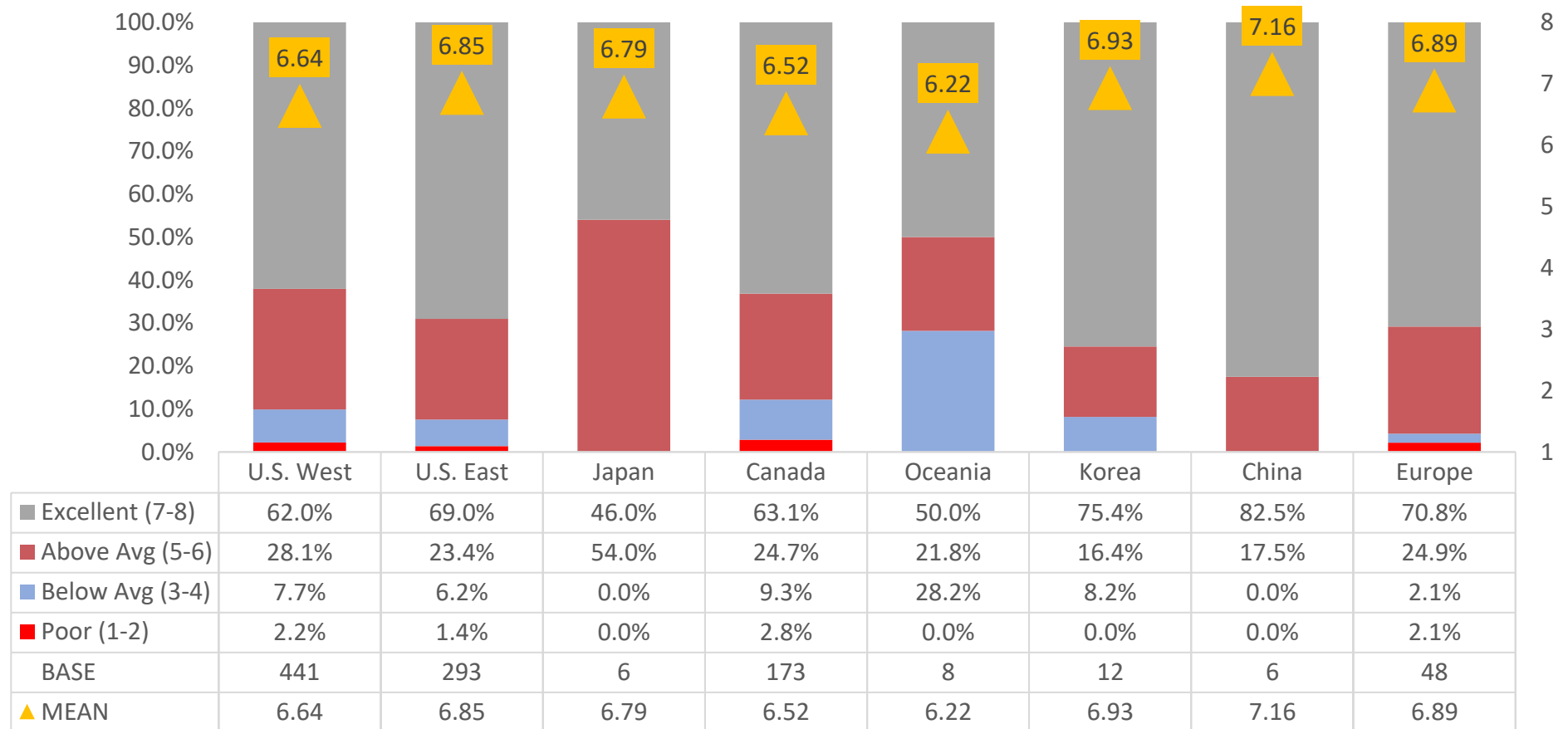
# LODGING/ ACCOMMODATIONS - MAUI

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



# TRANSPORTATION ON ISLAND - MAUI

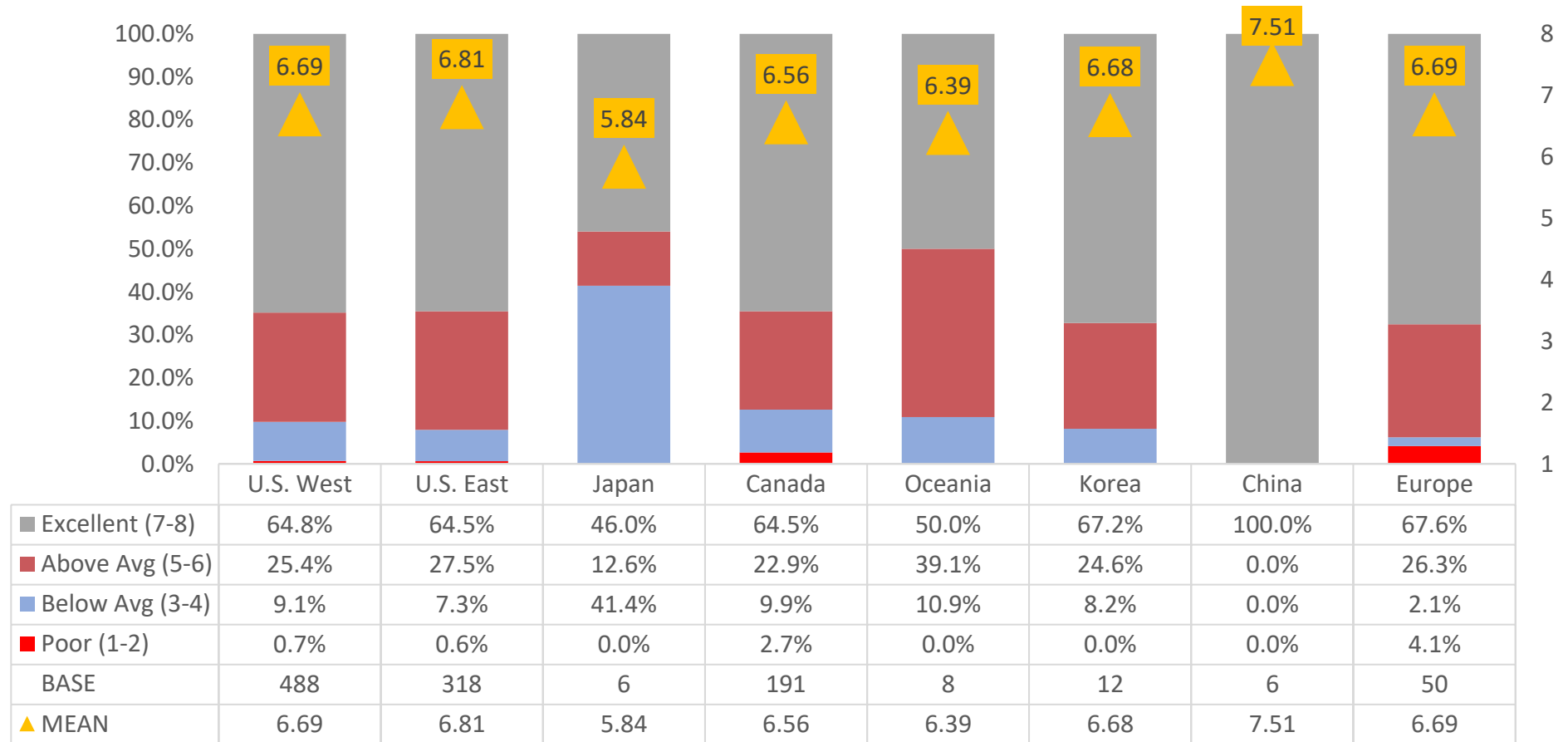
8-pt Rating Scale  
8=Excellent / 1=Poor





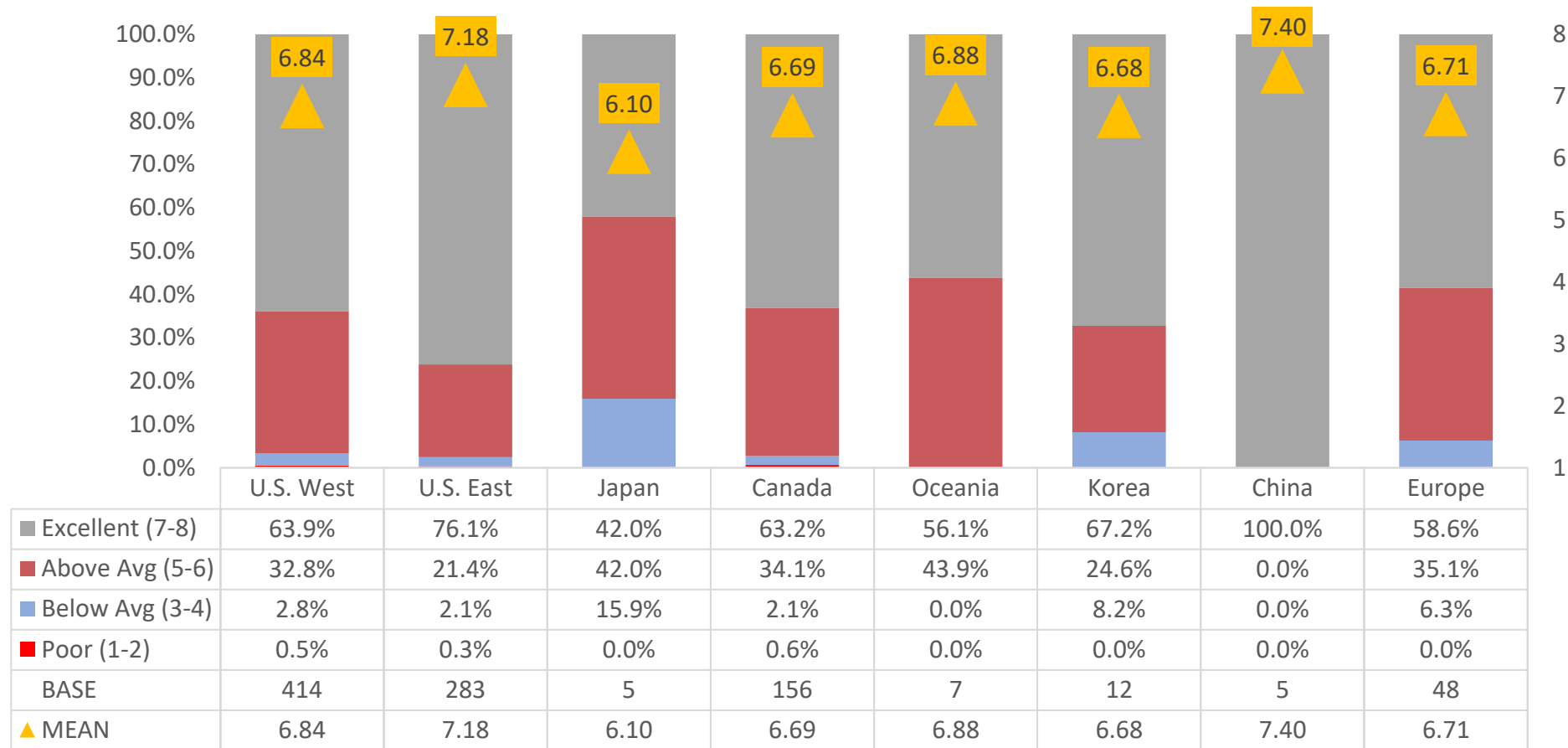
# AIRPORT - MAUI

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



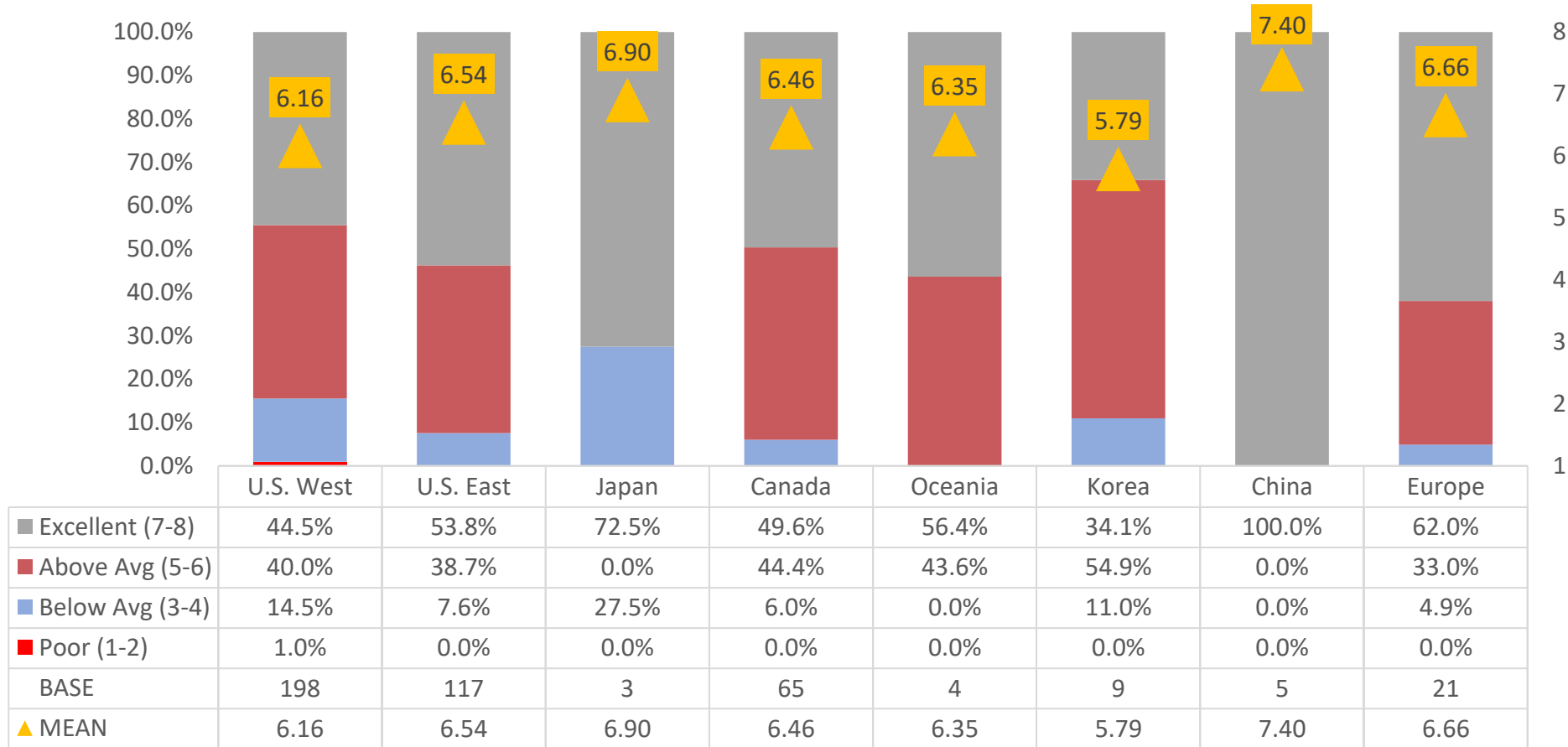
# CULTURAL EXPERIENCES - MAUI

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



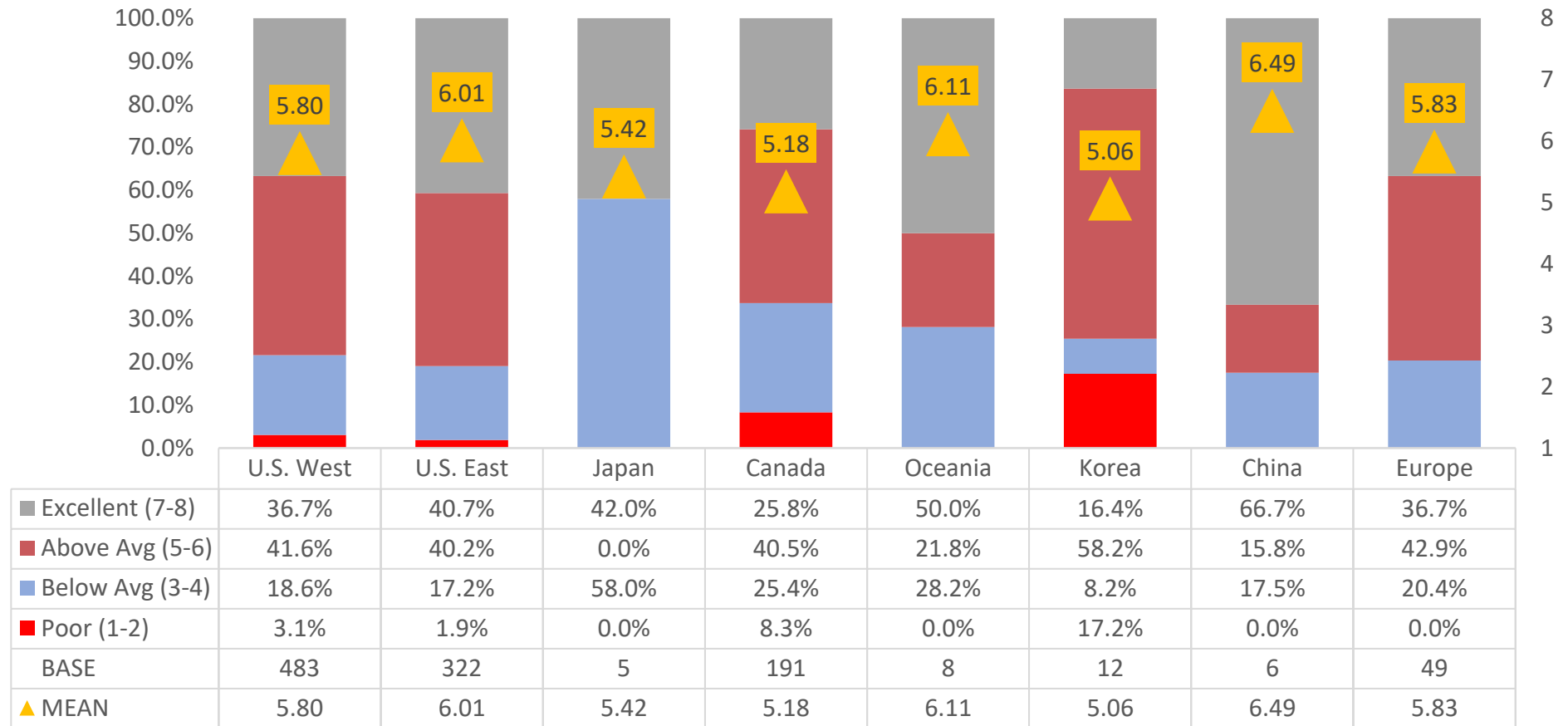
# VOLUNTEER EXPERIENCES - MAUI

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



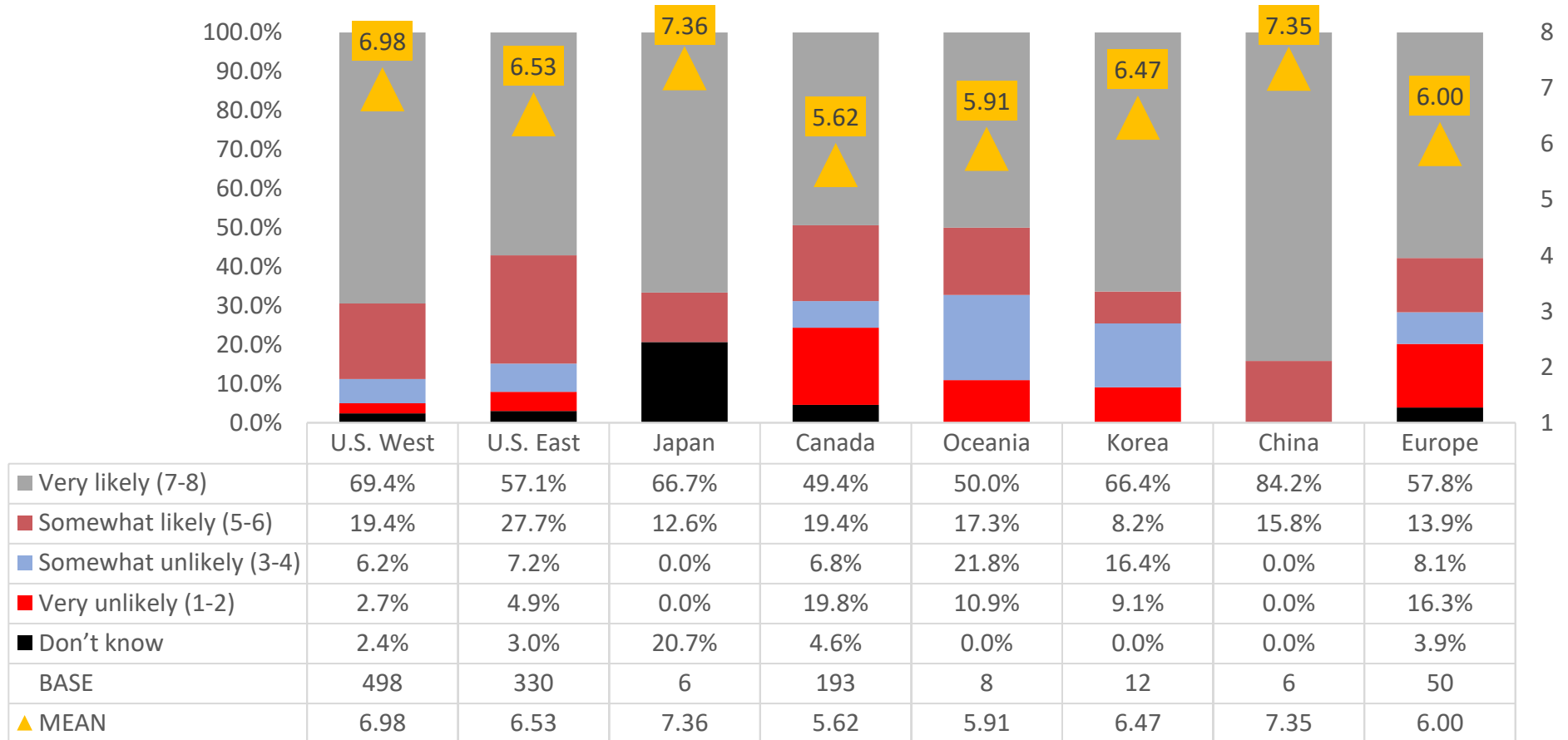
# VALUE FOR THE MONEY – MAUI

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



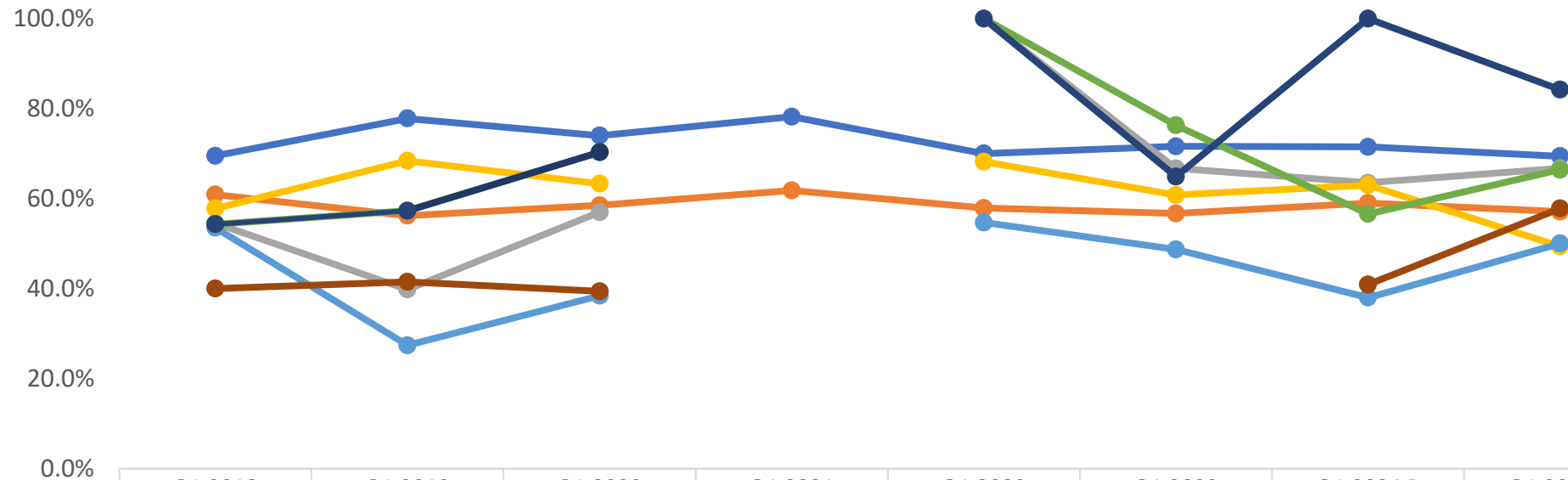
# LIKELIHOOD OF RETURN VISIT – MAUI

8-pt Rating Scale  
8 = Very likely / 1 = Very unlikely



# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

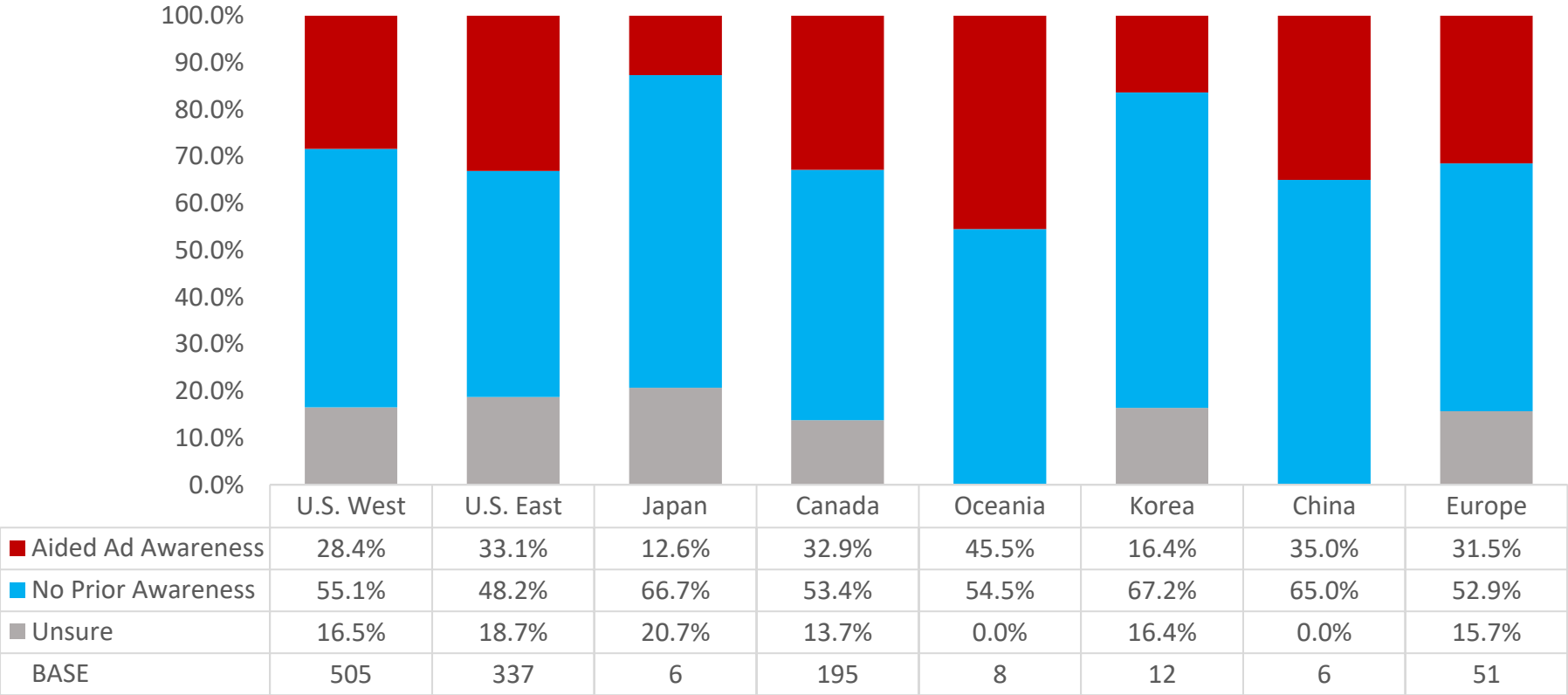


	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	69.5%	77.8%	74.0%	78.2%	70.0%	71.6%	71.5%	69.4%
U.S. East	60.9%	56.2%	58.5%	61.8%	57.9%	56.7%	59.0%	57.1%
Japan	54.5%	39.8%	57.0%		100.0%	66.7%	63.5%	66.7%
Canada	57.8%	68.4%	63.3%		68.2%	60.8%	63.0%	49.4%
Oceania	53.5%	27.4%	38.4%		54.7%	48.7%	38.0%	50.0%
Korea	54.3%	57.3%	70.3%		100.0%	76.3%	56.6%	66.4%
China	54.3%	57.3%	70.3%		100.0%	64.9%	100.0%	84.2%
Europe	40.0%	41.5%	39.4%				40.9%	57.8%

P= Preliminary Data

Q. How likely are you to visit Maui again in the next five years?

# AIDED ADVERTISING AWARENESS - MAUI

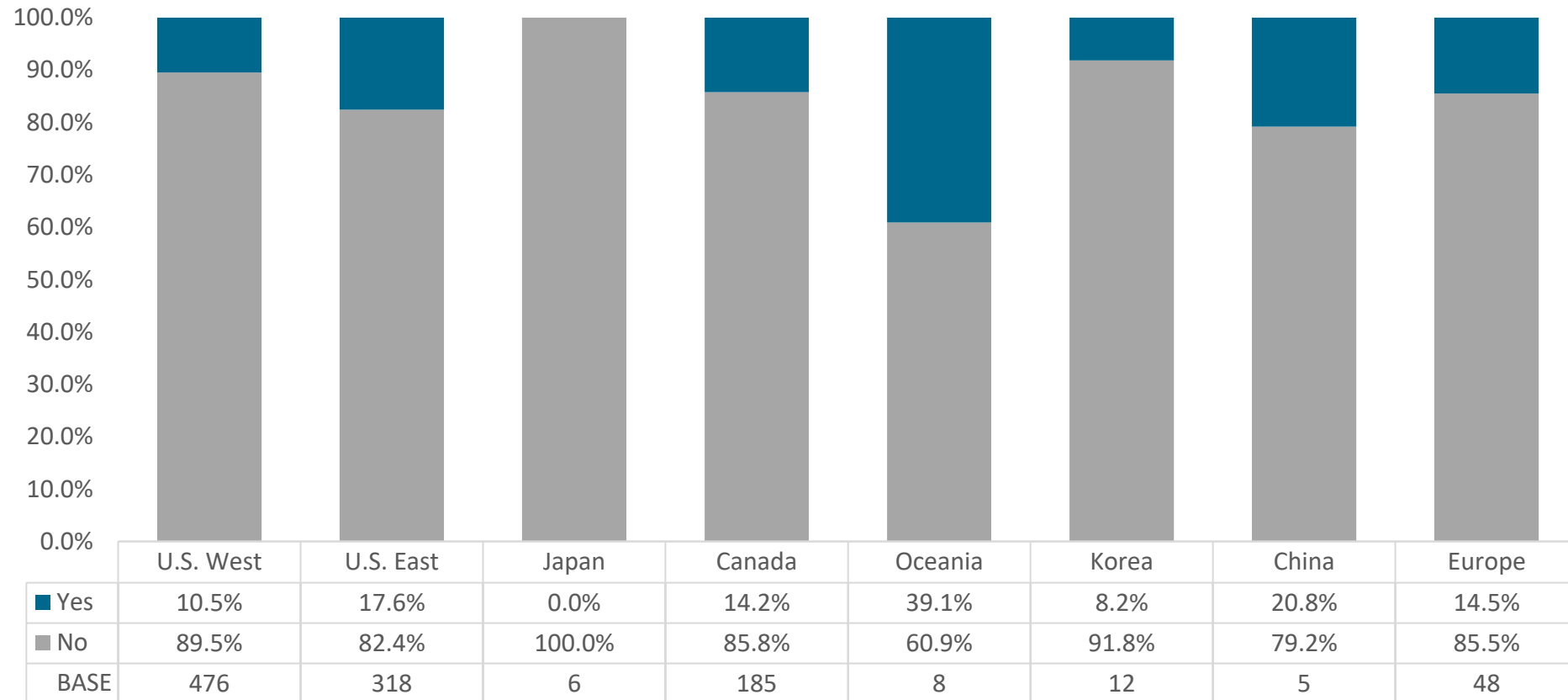


# MOTIVATING FACTORS - MAUI

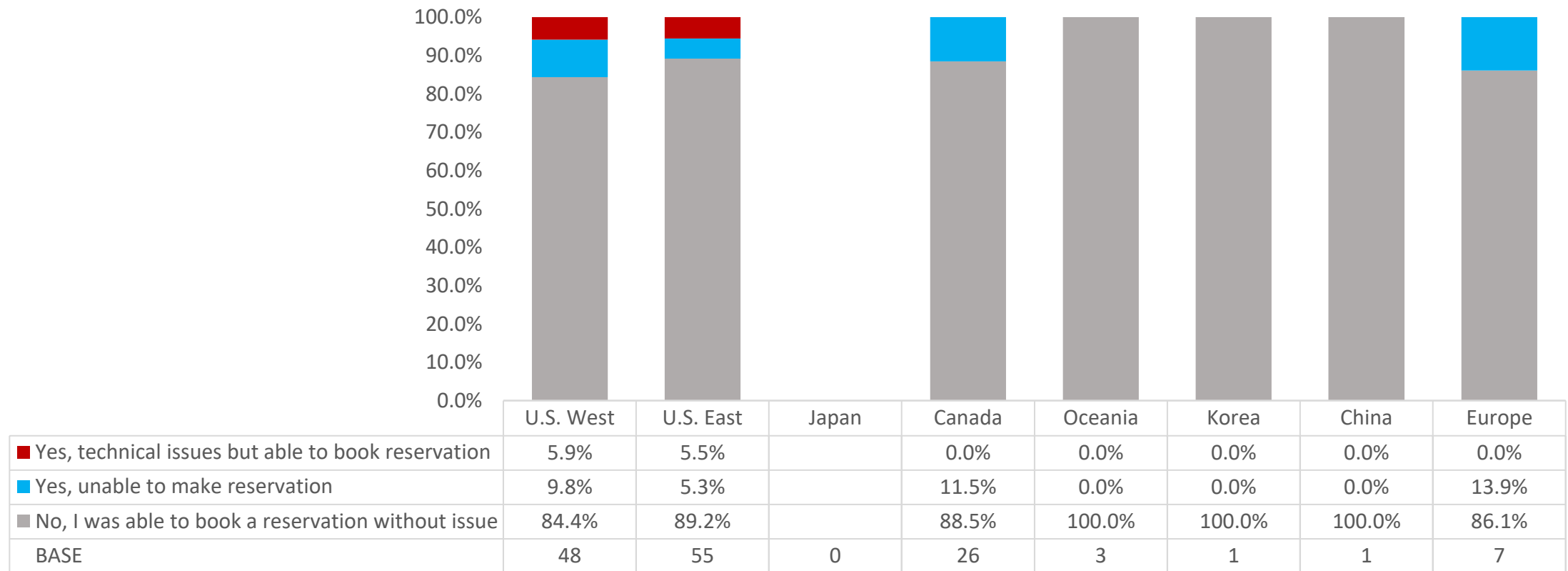
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
<b>Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)</b>	40.3%	50.7%	20.7%	43.3%	21.8%	65.0%	40.9%	55.0%
<b>Hawaiian cultural experiences and Hawaiian cultural events</b>	17.3%	19.6%	41.4%	16.6%	10.9%	17.5%	0.0%	23.4%
<b>Outdoor or sporting activities and events</b>	16.8%	14.3%	20.7%	15.5%	0.0%	0.0%	33.6%	23.6%
<b>Social media posts and videos</b>	16.6%	17.8%	0.0%	19.8%	28.2%	15.8%	33.6%	29.7%
<b>Hawaiian music</b>	12.0%	10.6%	0.0%	12.4%	0.0%	0.0%	8.2%	15.6%
<b>Television programs or movies filmed in Hawai'i</b>	8.7%	9.0%	12.6%	10.4%	10.9%	17.5%	8.2%	27.6%
<b>Attend a festival or other event</b>	2.7%	6.0%	20.7%	5.6%	0.0%	0.0%	0.0%	3.9%
<b>BASE</b>	505	336	6	194	8	6	12	51



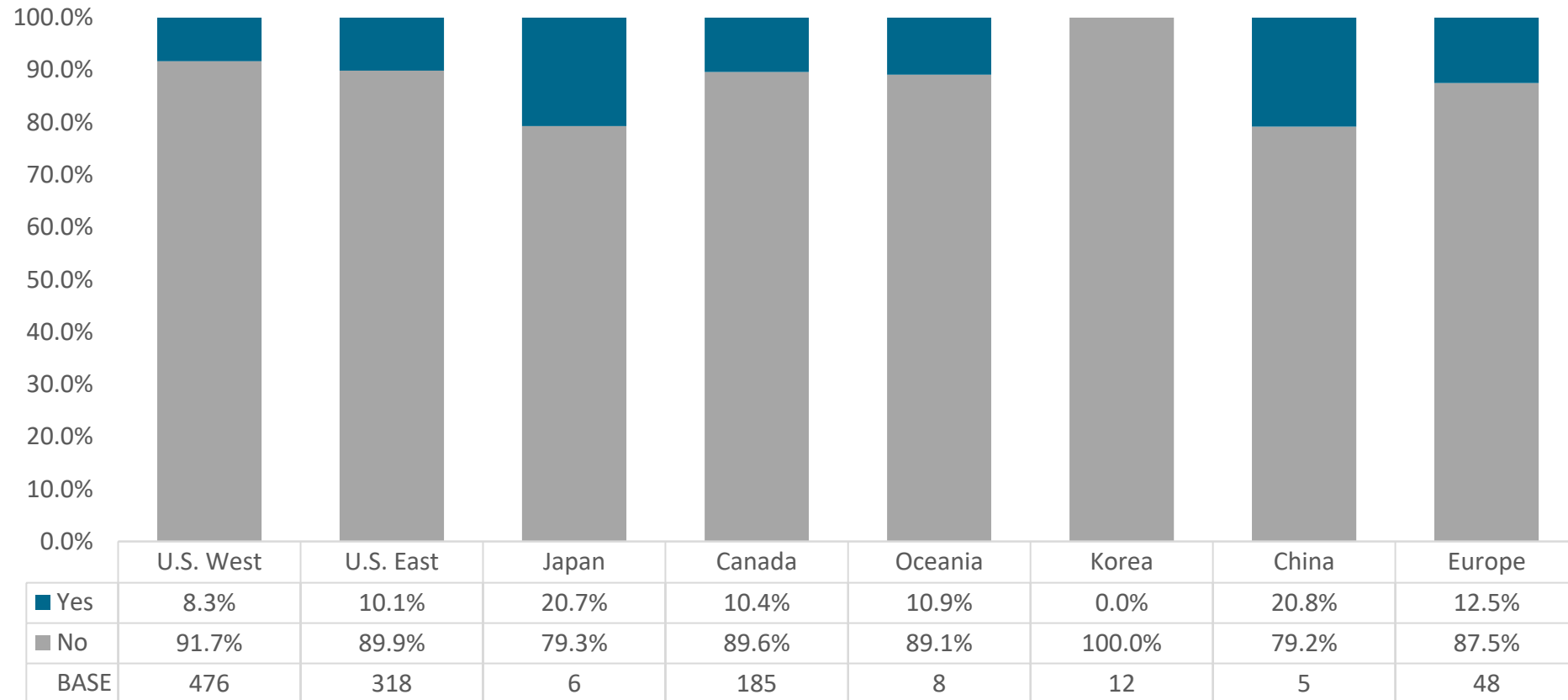
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



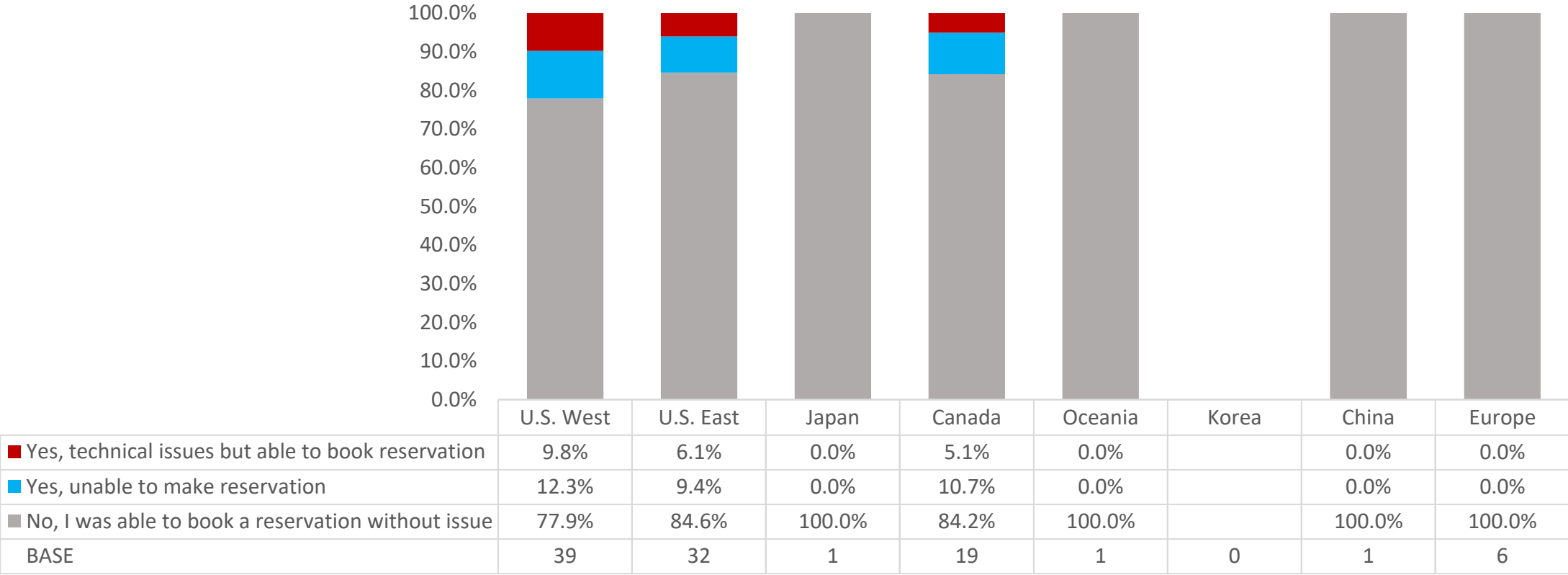
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



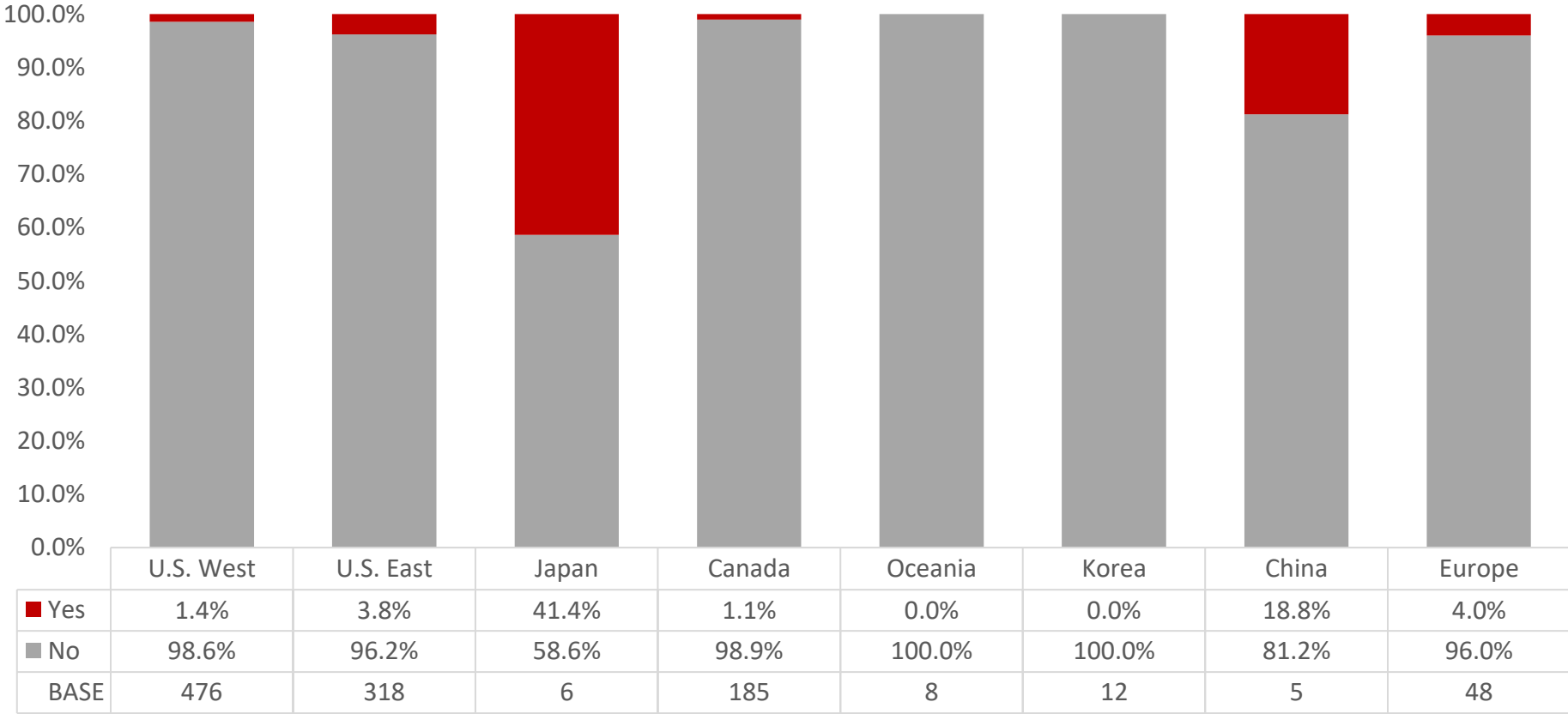
# ‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



# ‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



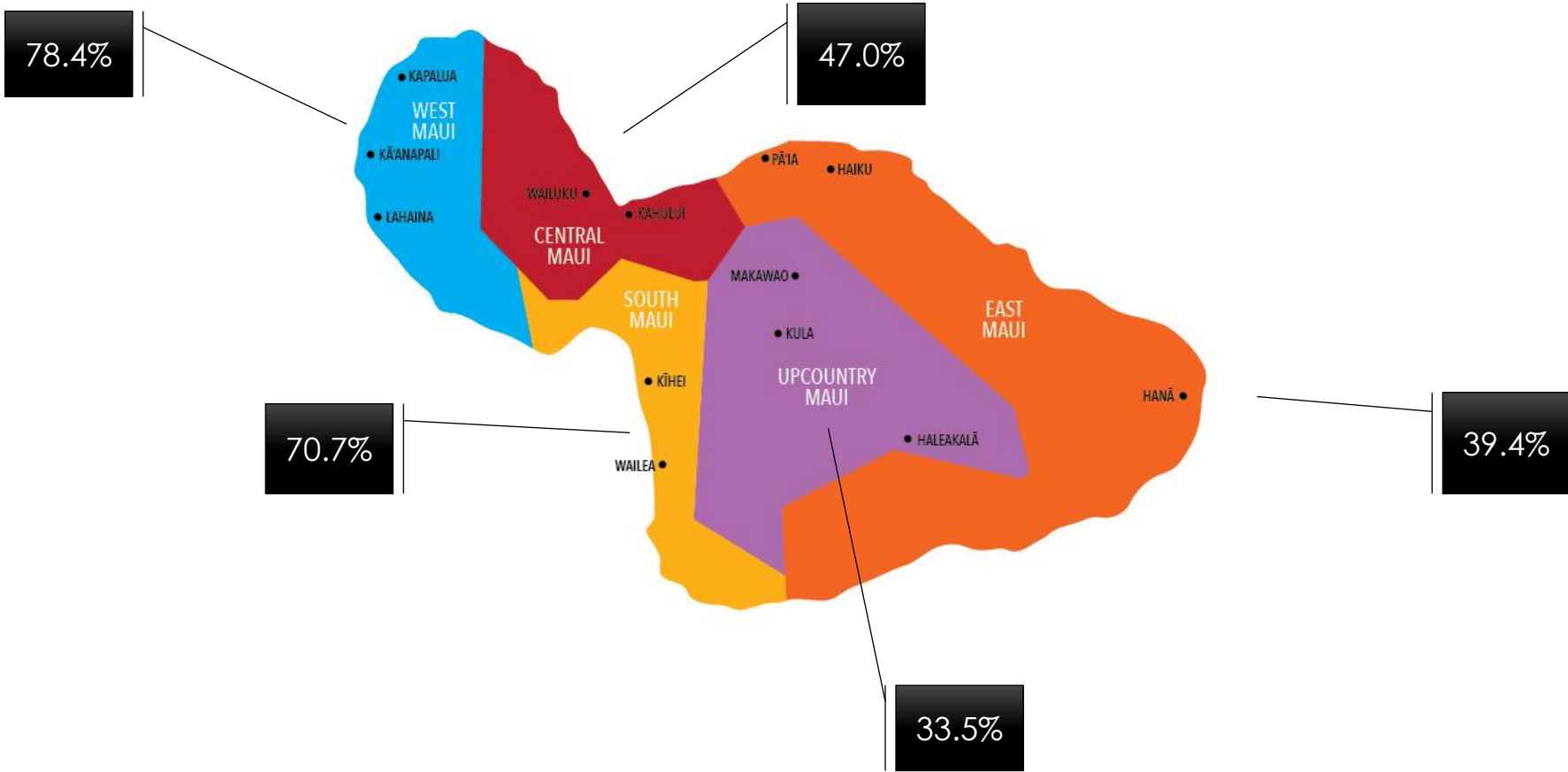
# VISITED MAUI FOR SPECIFIC EVENT



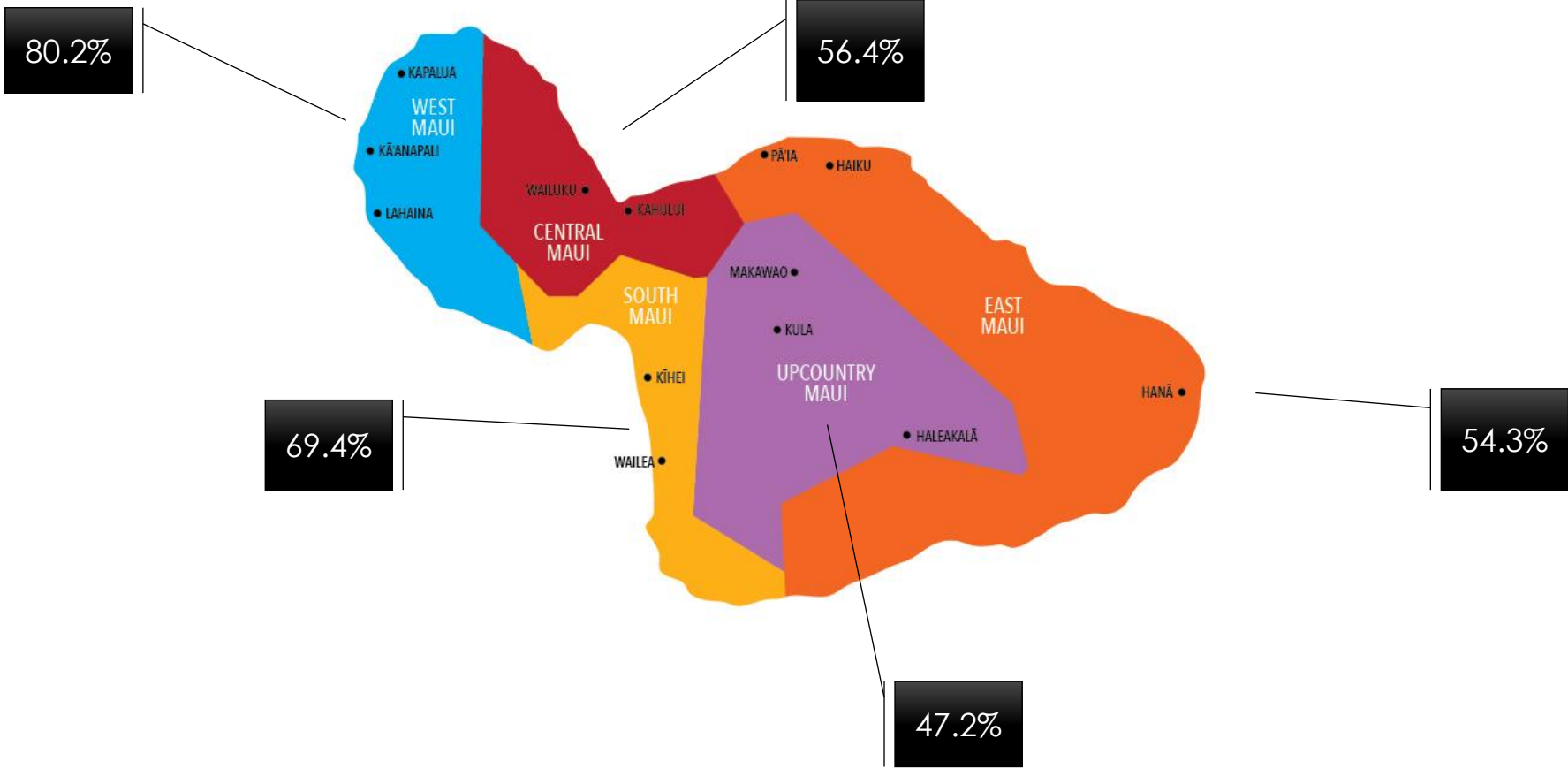
# VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Maui Marathon	28.6%	40.3%	0.0%	0.0%	-	-	0.0%	0.0%
Convention/Conference/ Retreat/Seminar/Meeting/ Workshop/Training/Work event	28.6%	8.7%	0.0%	0.0%	-	-	0.0%	50.0%
Other sporting event	0.0%	16.8%	0.0%	100.0%	-	-	0.0%	0.0%
Sentry Tournament of Golf Champions	14.3%	0.0%	50.0%	0.0%	-	-	0.0%	0.0%
Hawaii Food and Wine Festival	0.0%	8.7%	50.0%	0.0%	-	-	0.0%	0.0%
Other Festival/concert	14.3%	8.7%	0.0%	0.0%	-	-	0.0%	50.0%
Maui Invitational	14.3%	0.0%	0.0%	0.0%	-	-	0.0%	0.0%
Wedding/Honeymoon/ Anniversary/Birthday/Funeral/Gra duation	0.0%	8.7%	0.0%	0.0%	-	-	0.0%	0.0%
Other (please specify festival/event name)	0.0%	8.1%	0.0%	0.0%	-	-	0.0%	0.0%
Maui Film Festival	0.0%	0.0%	0.0%	0.0%	-	-	100.0%	0.0%
BASE	7	12	2	2	0	0	1	2

# AREAS VISITED MAUI U.S. WEST

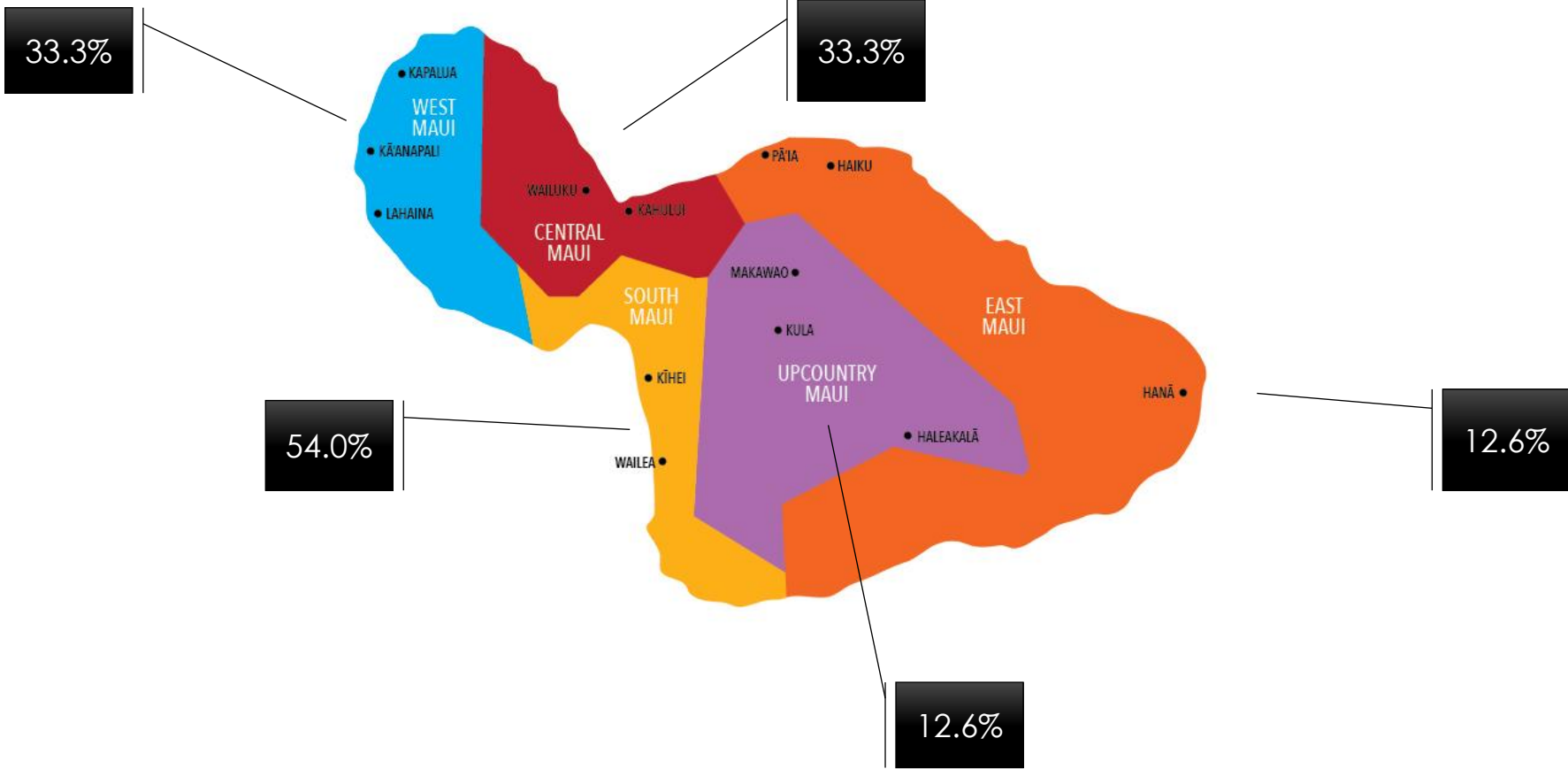


# AREAS VISITED MAUI U.S. EAST

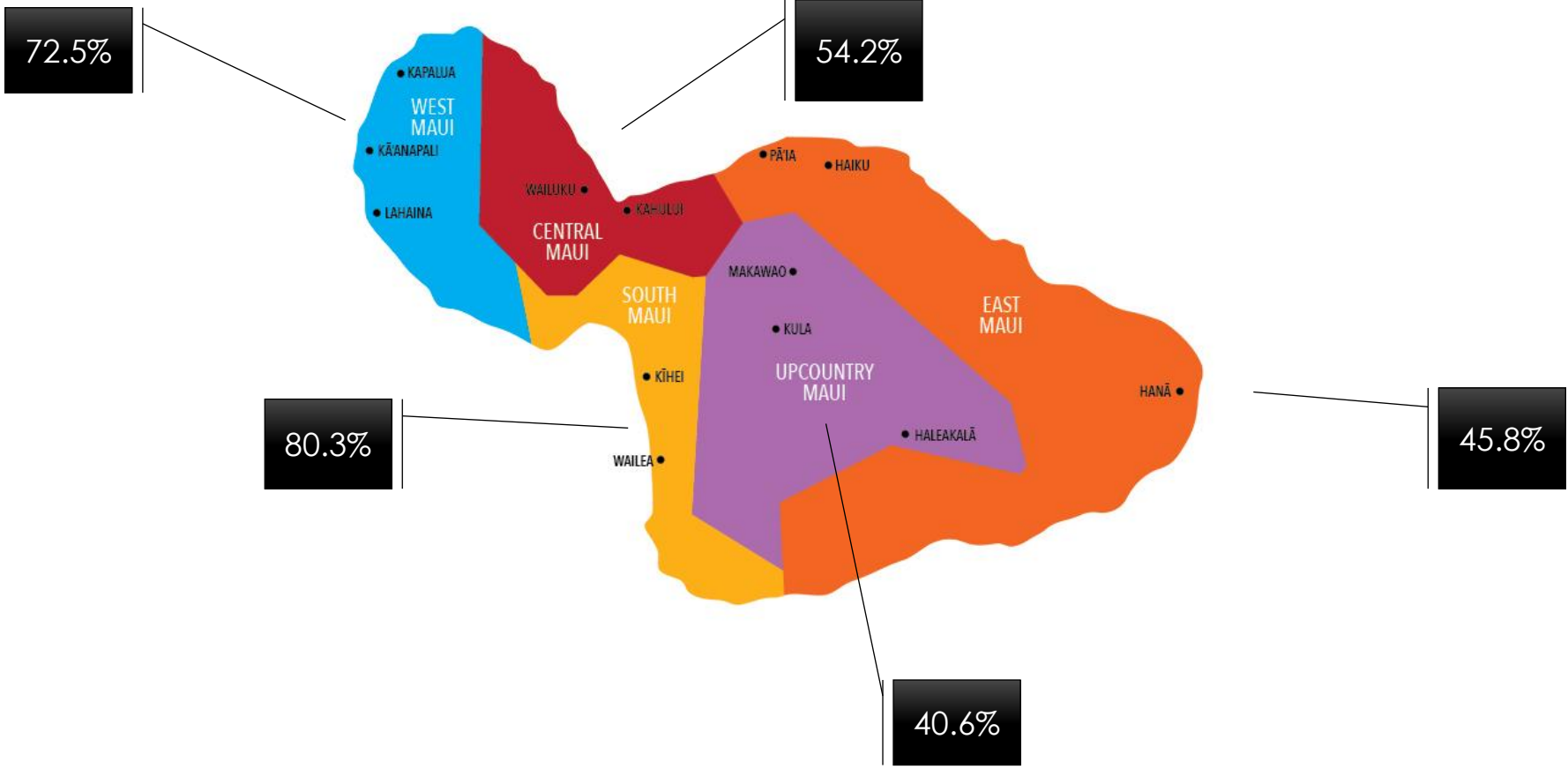




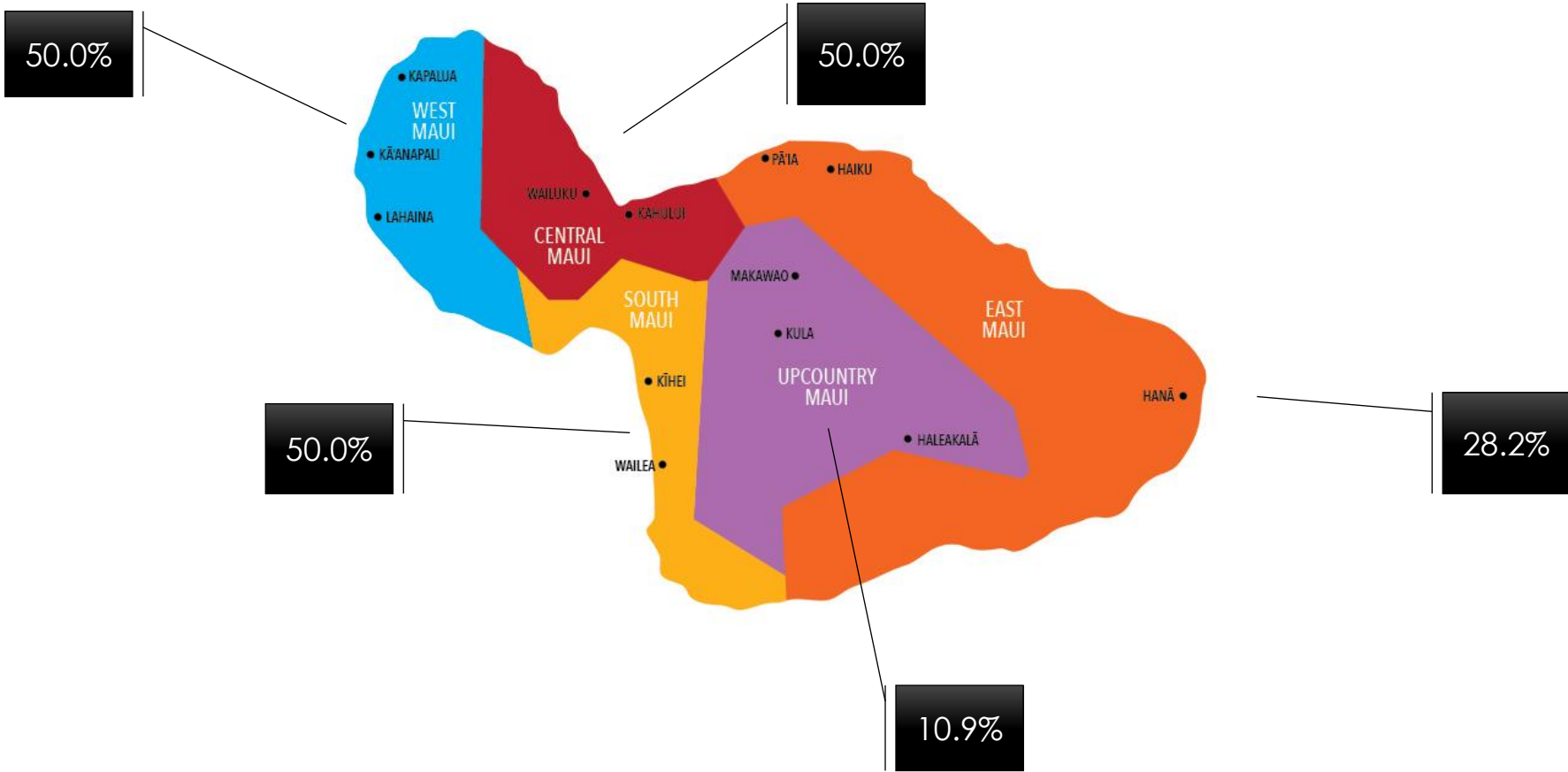
# AREAS VISITED MAUI JAPAN



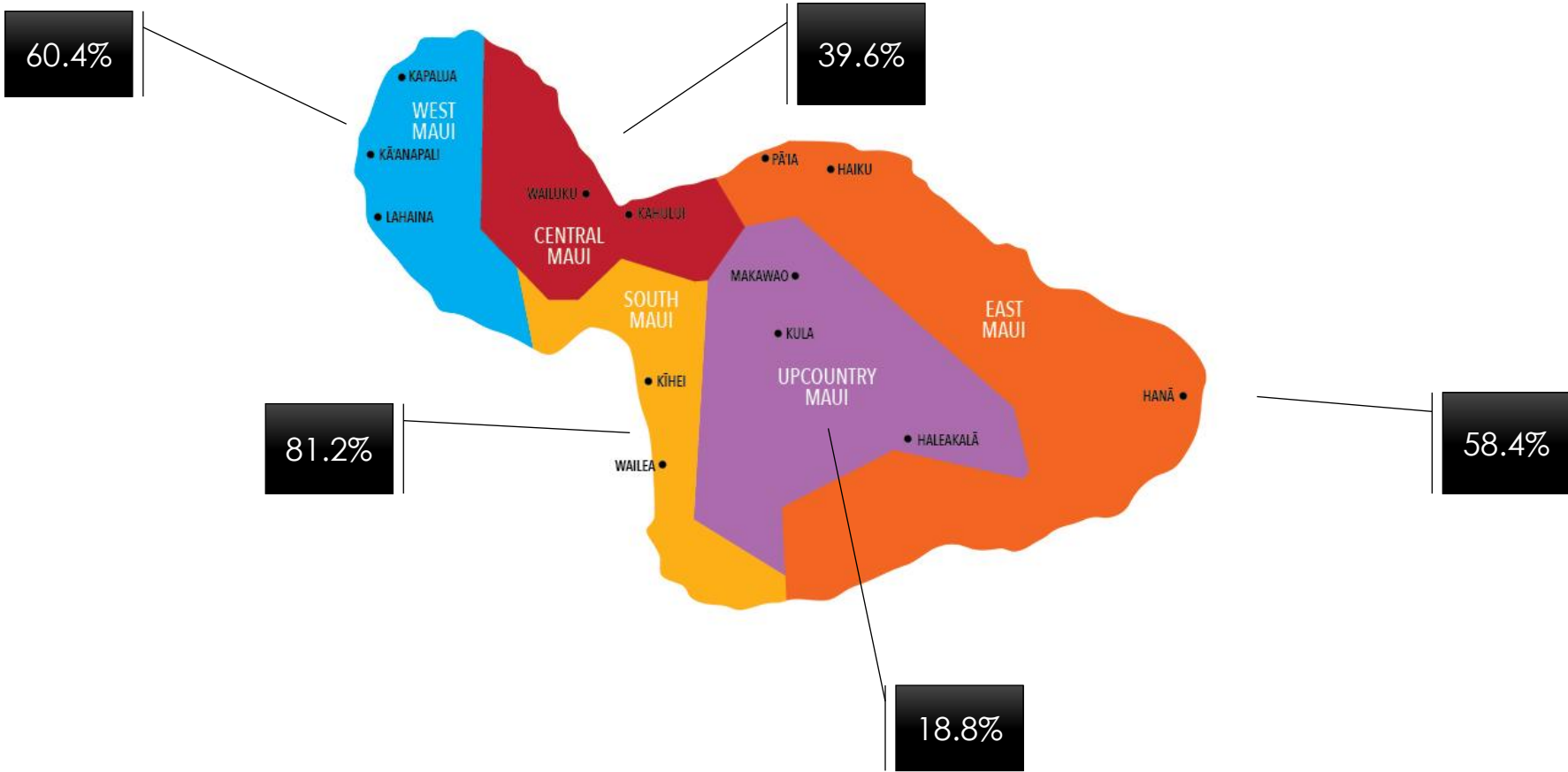
# AREAS VISITED MAUI CANADA



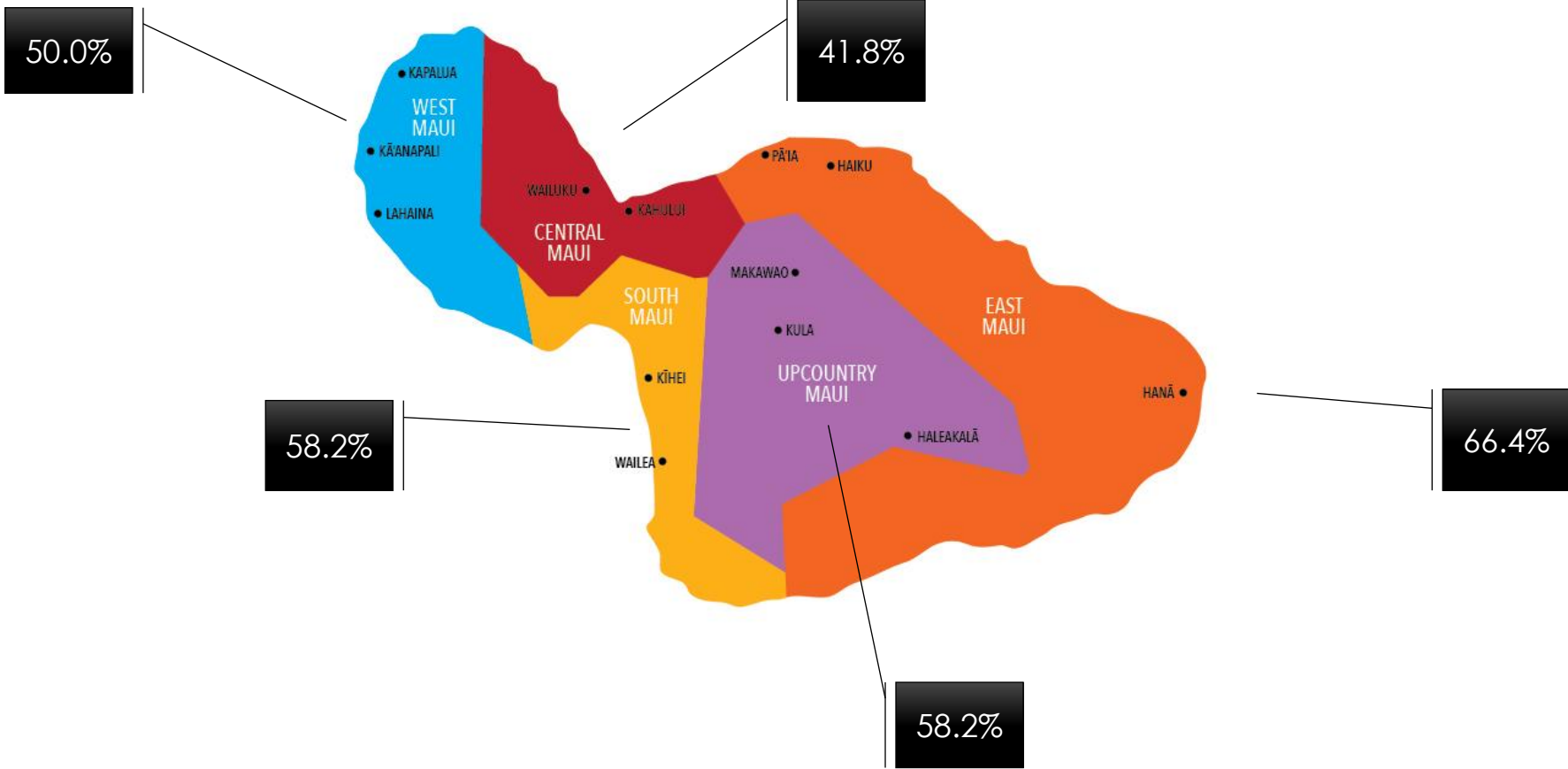
# AREAS VISITED MAUI OCEANIA



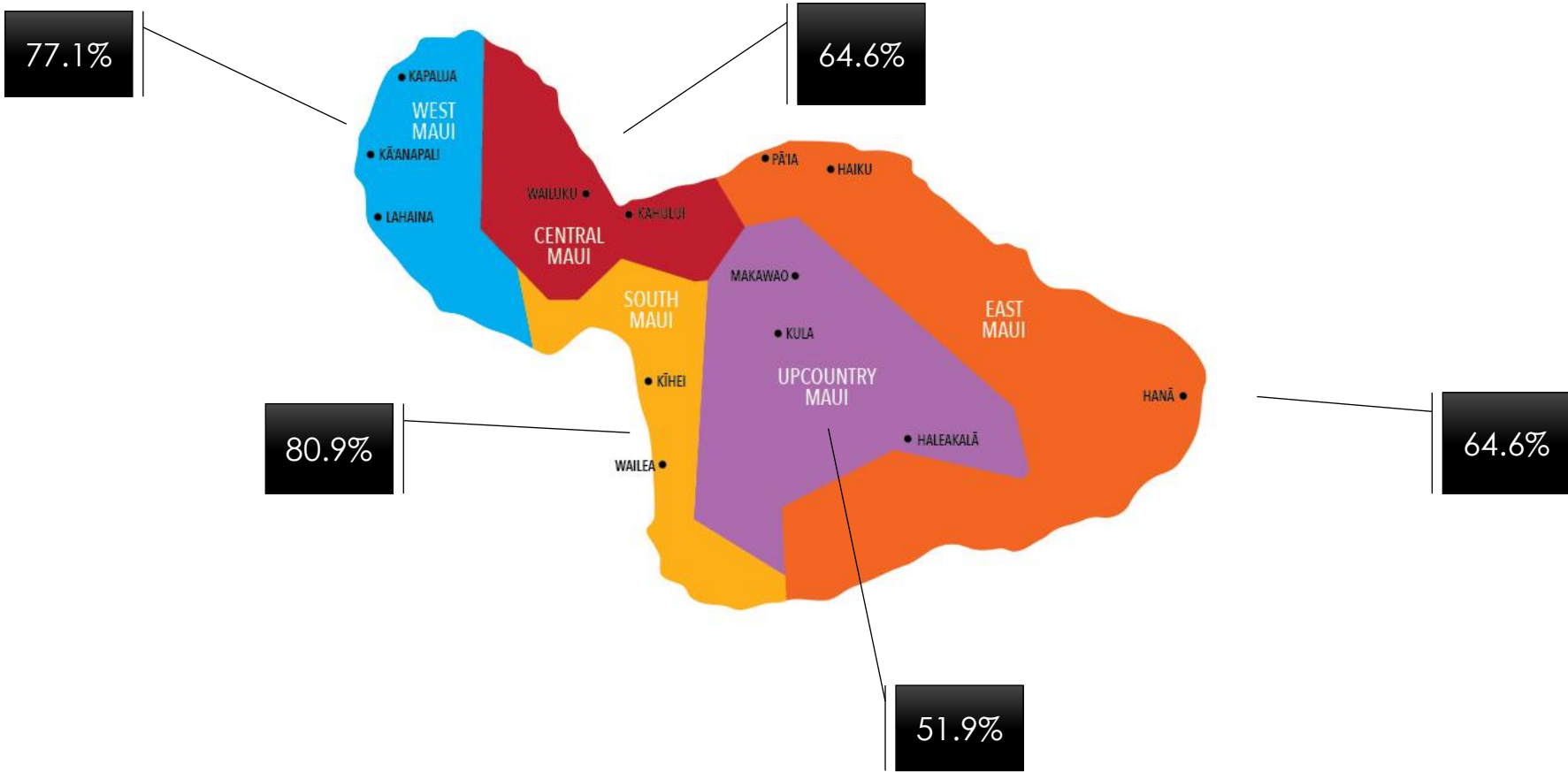
# AREAS VISITED MAUI CHINA



# AREAS VISITED MAUI KOREA

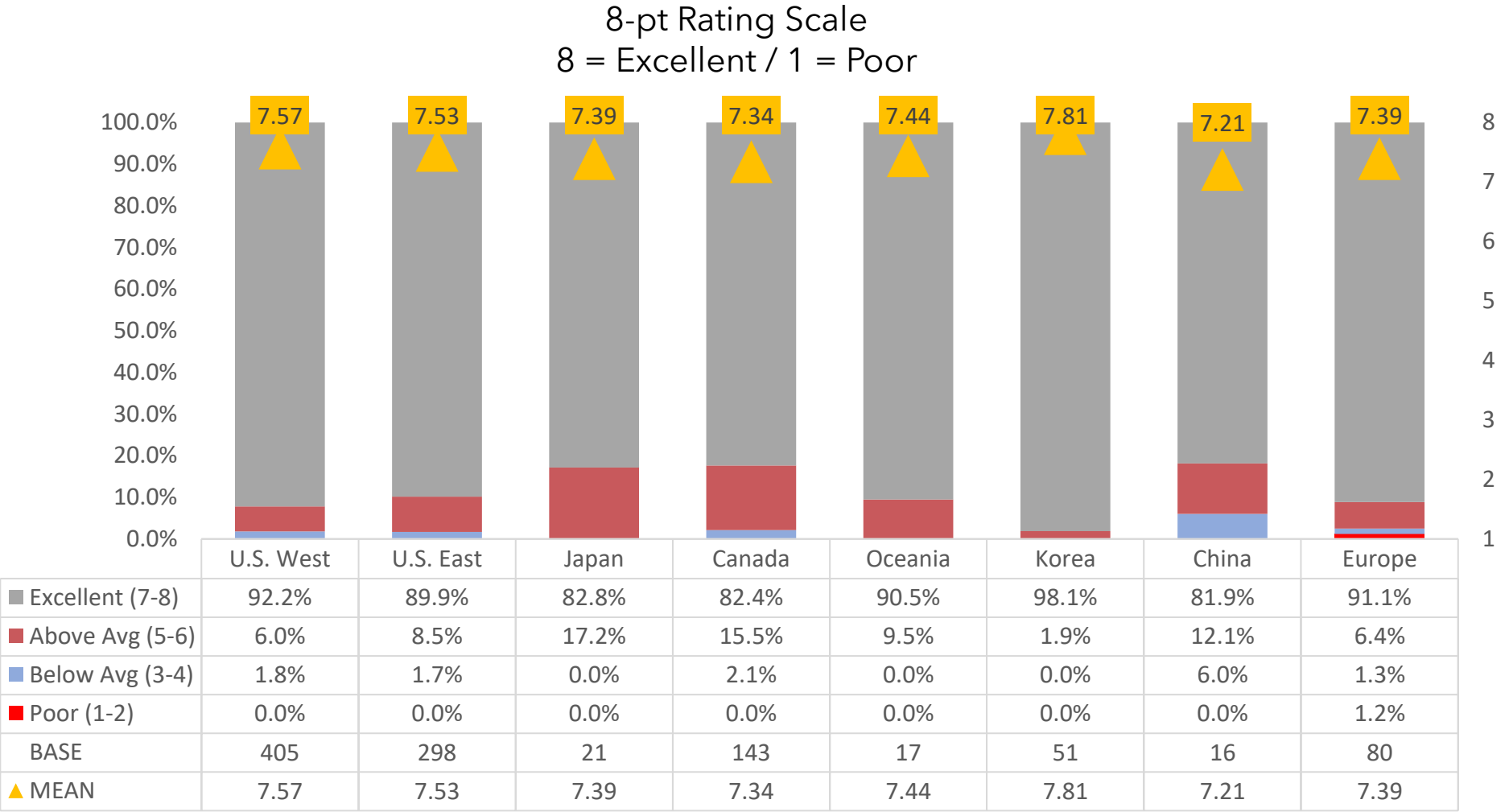


# AREAS VISITED MAUI EUROPE



# Section 10 – Island of Hawai‘i

# SATISFACTION - ISLAND OF HAWAI‘I





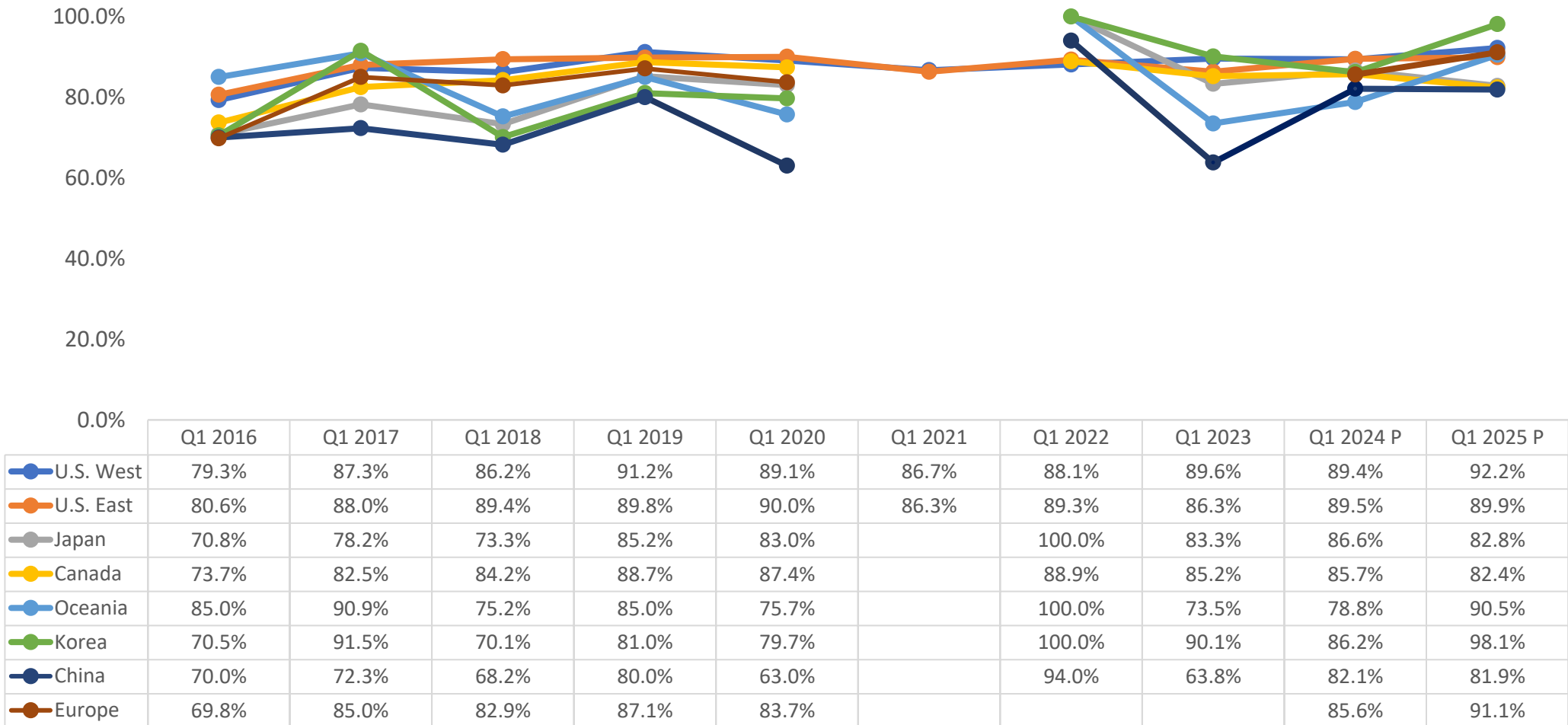
# SATISFACTION – ISLAND OF HAWAI‘I

- ***Trips to Hawai‘i:*** Repeat visitors from **U.S. West** give higher satisfaction scores than first-time visitors from this market.
- ***Education:*** Those with a college degree from **U.S. East** are more satisfied with their stay than those without a college degree from this visitor market.

# SATISFACTION - ISLAND OF HAWAI‘I

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

100.0%  
80.0%  
60.0%  
40.0%  
20.0%  
0.0%



P= Preliminary Data

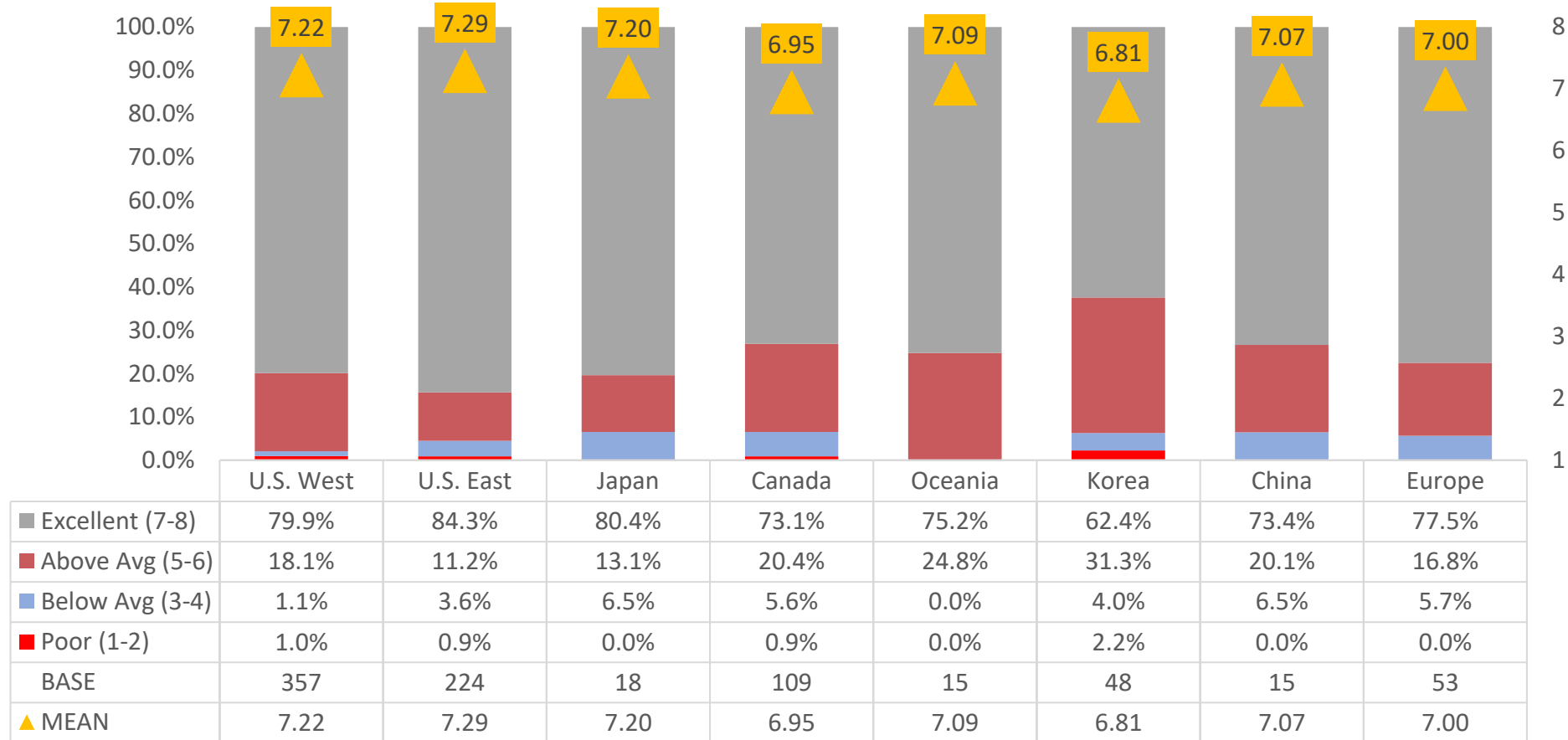
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



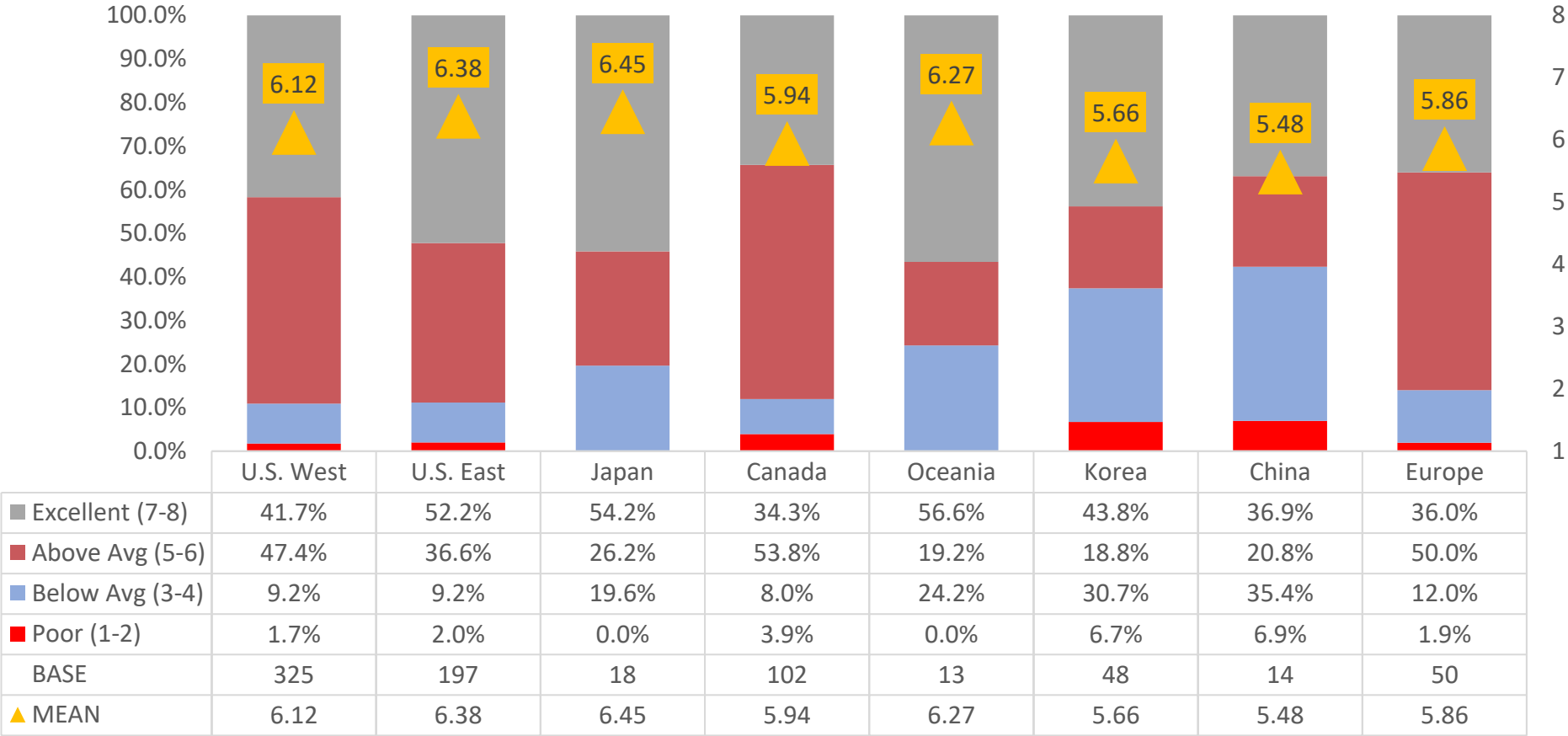
# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



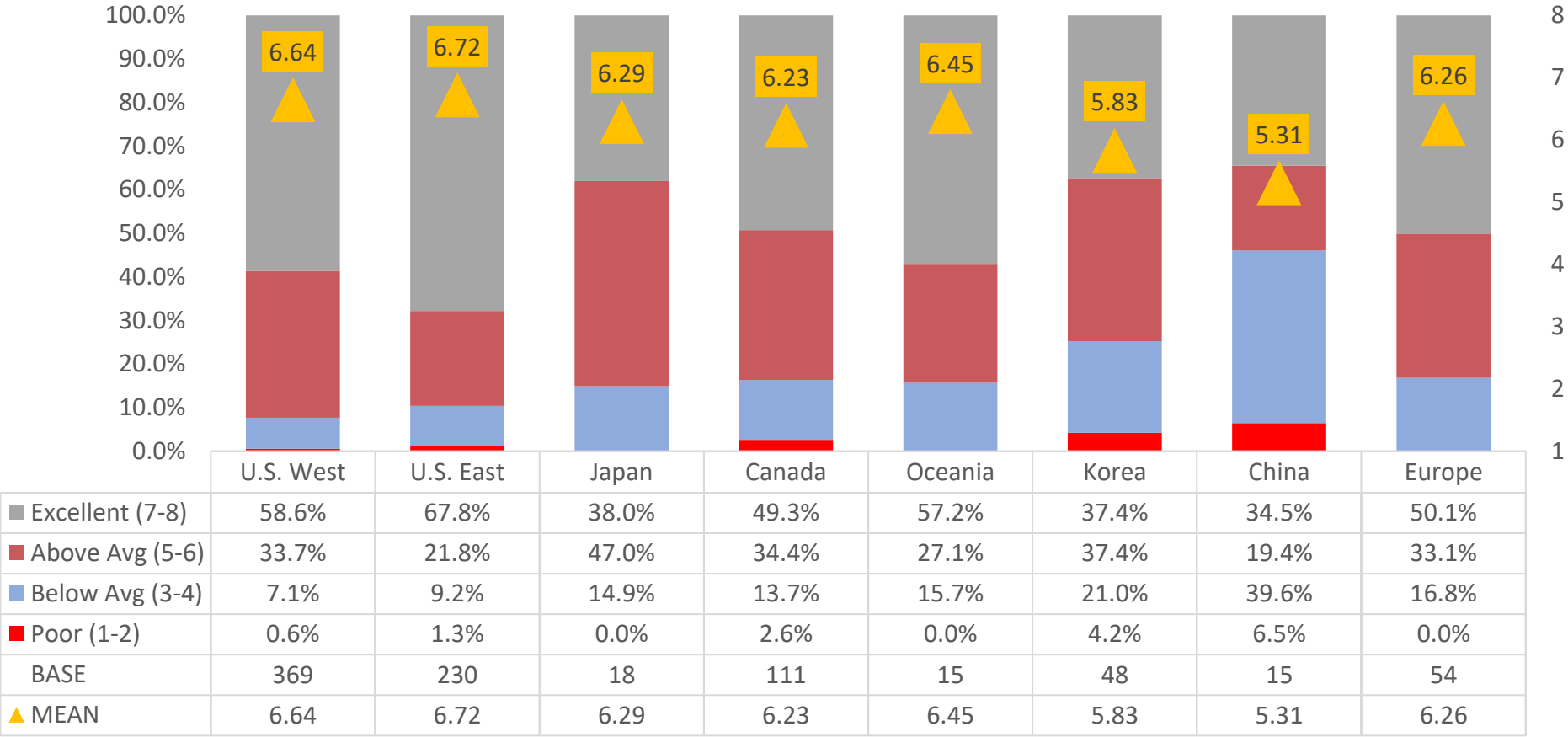
# SHOPPING - ISLAND OF HAWAI‘I

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



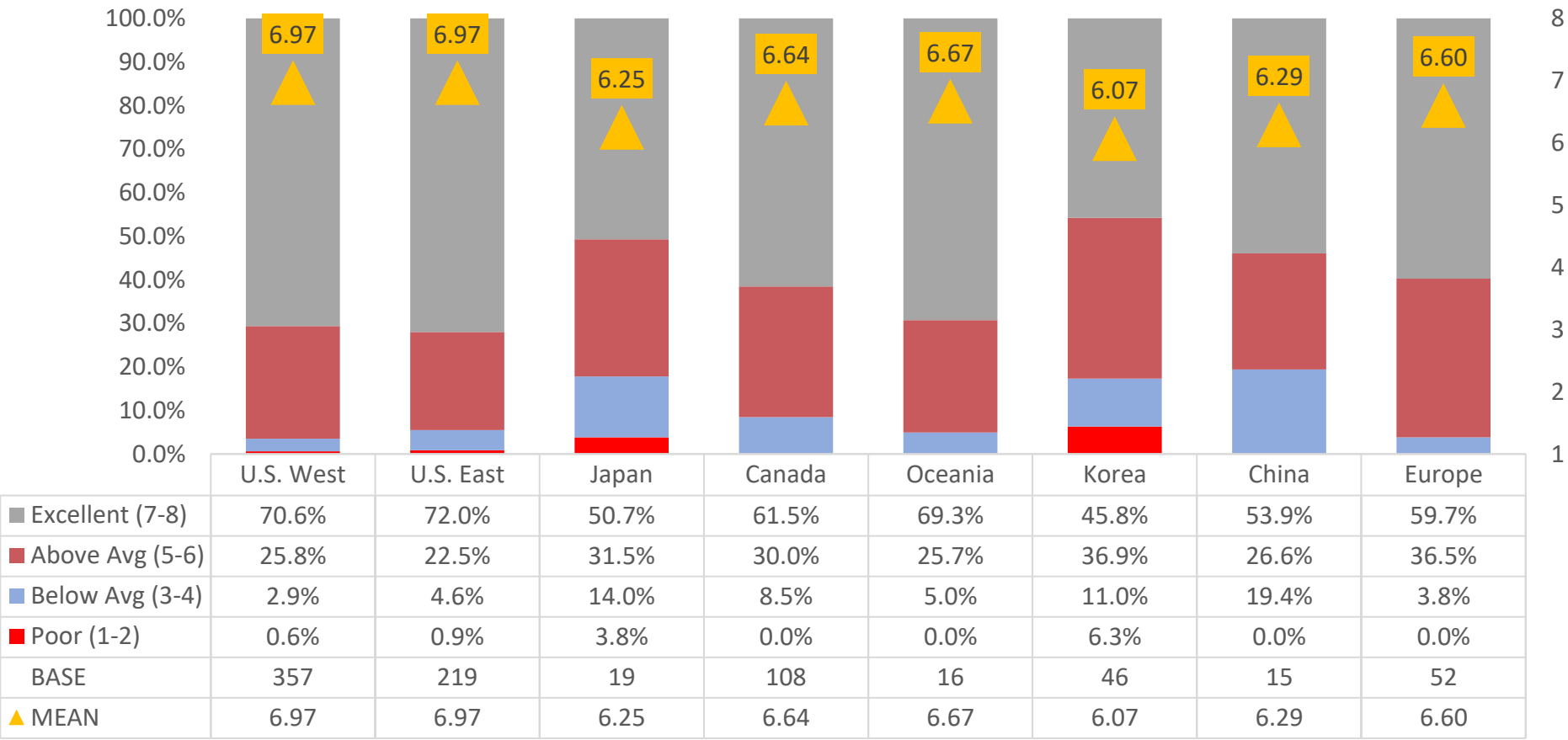
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



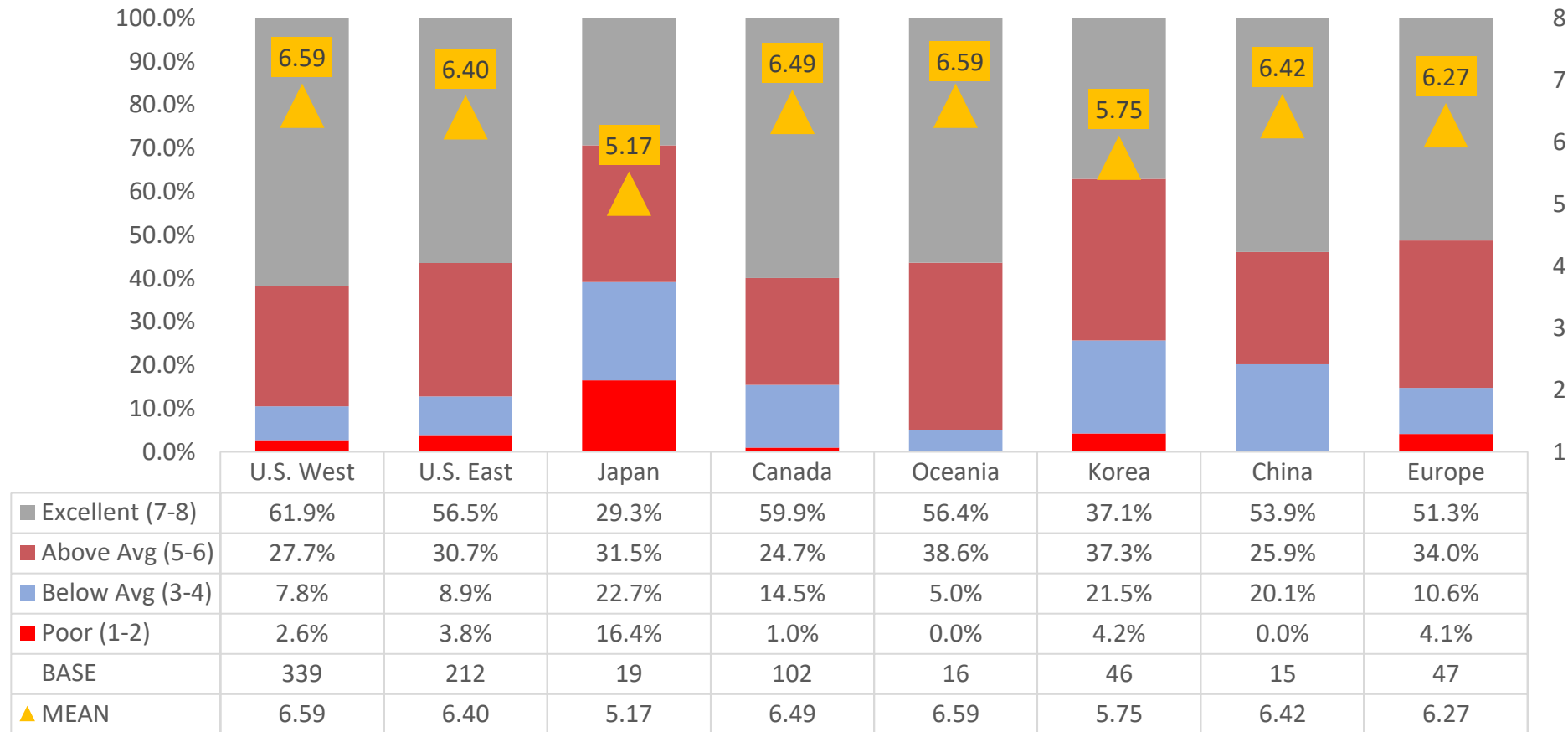
# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI‘I

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



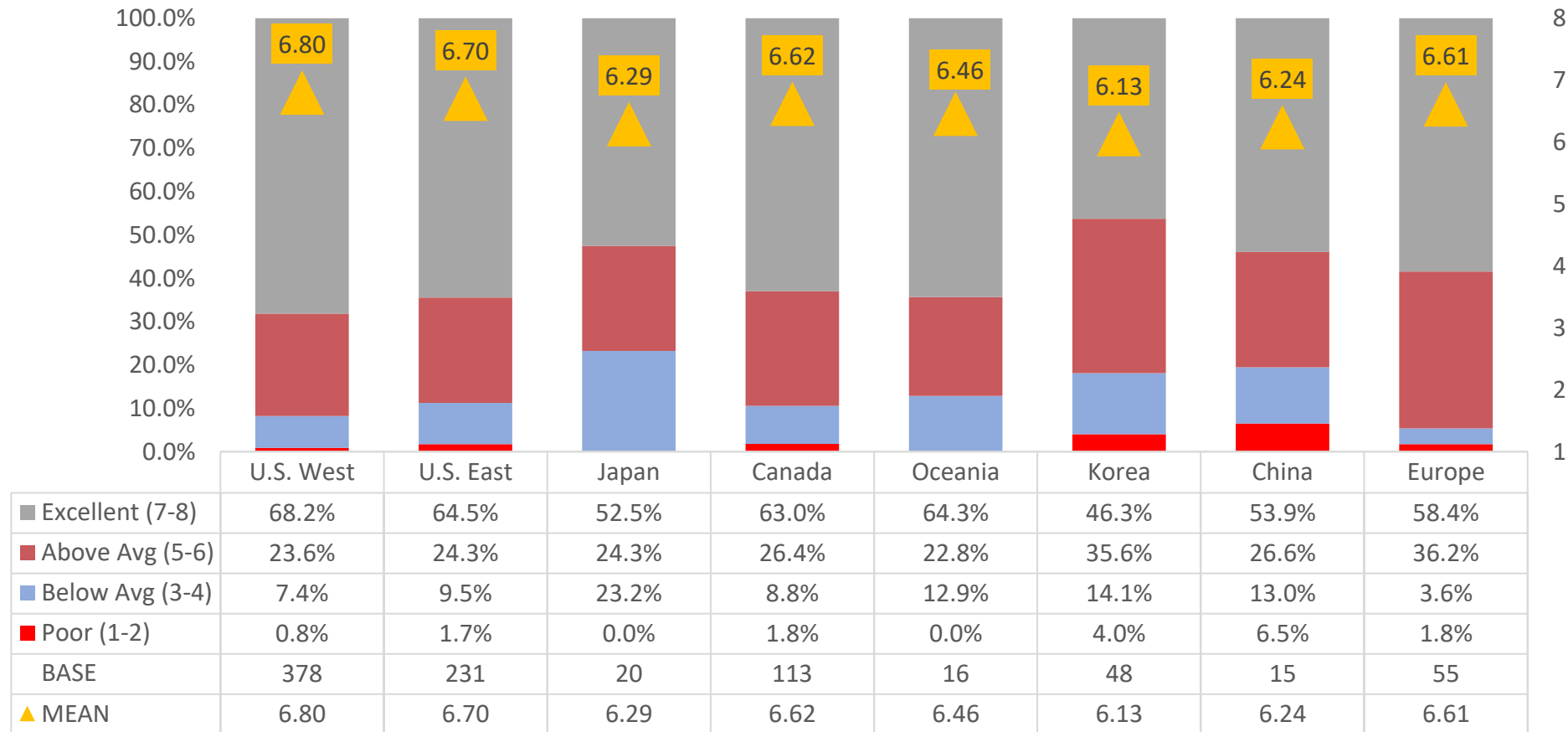
# TRANSPORTATION ON ISLAND – ISLAND OF HAWAI‘I

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



# AIRPORT - ISLAND OF HAWAI'I

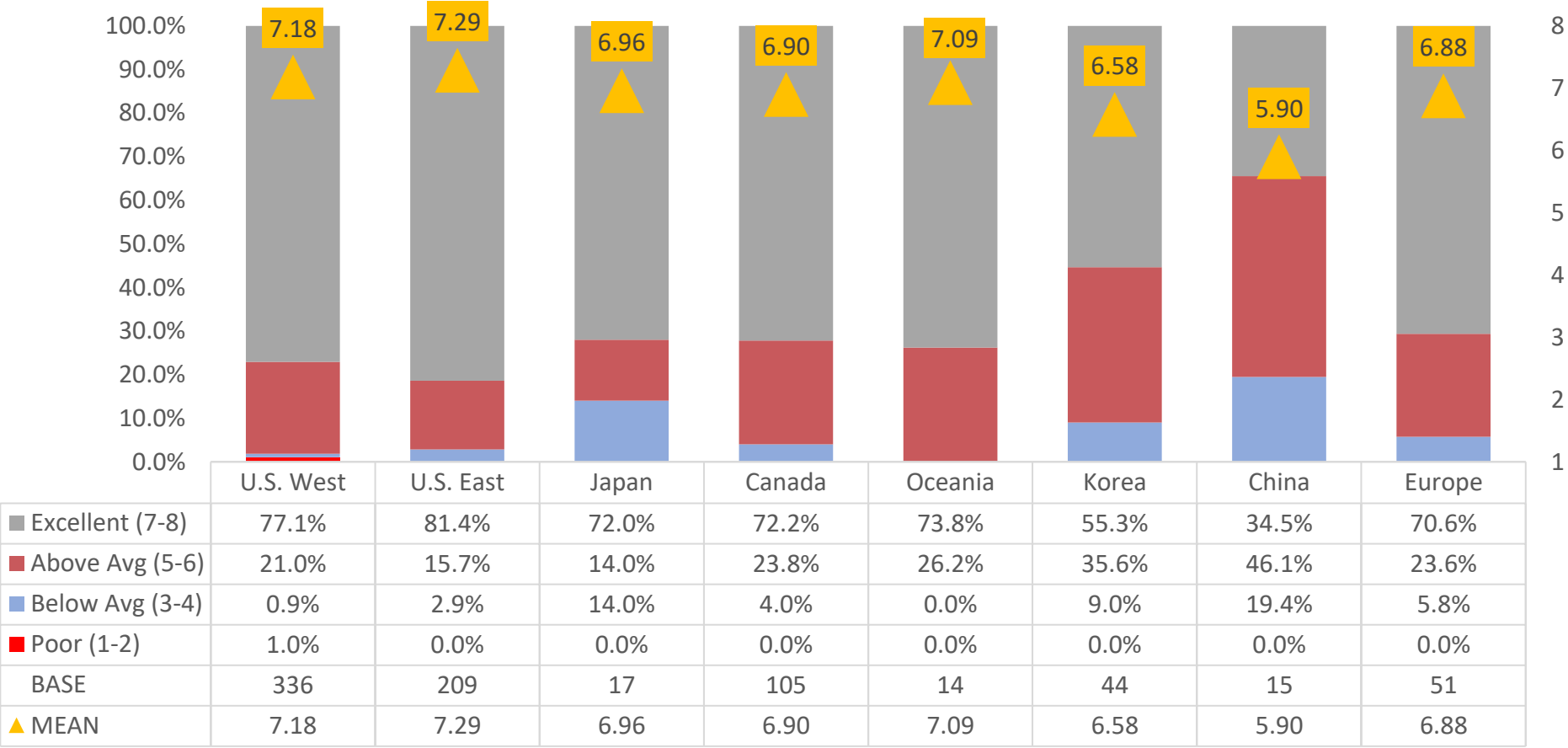
8-pt Rating Scale  
8 = Excellent / 1 = Poor





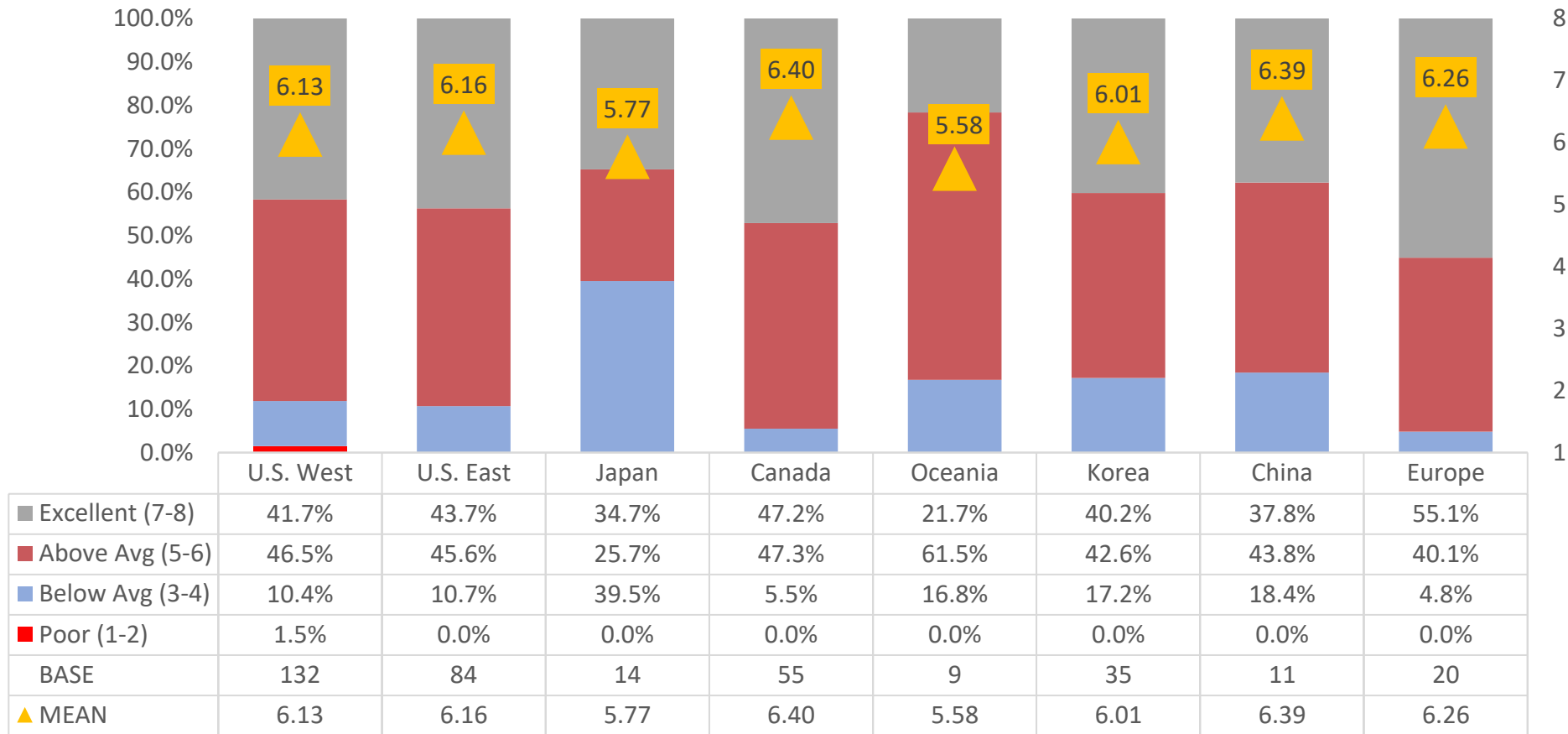
# CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



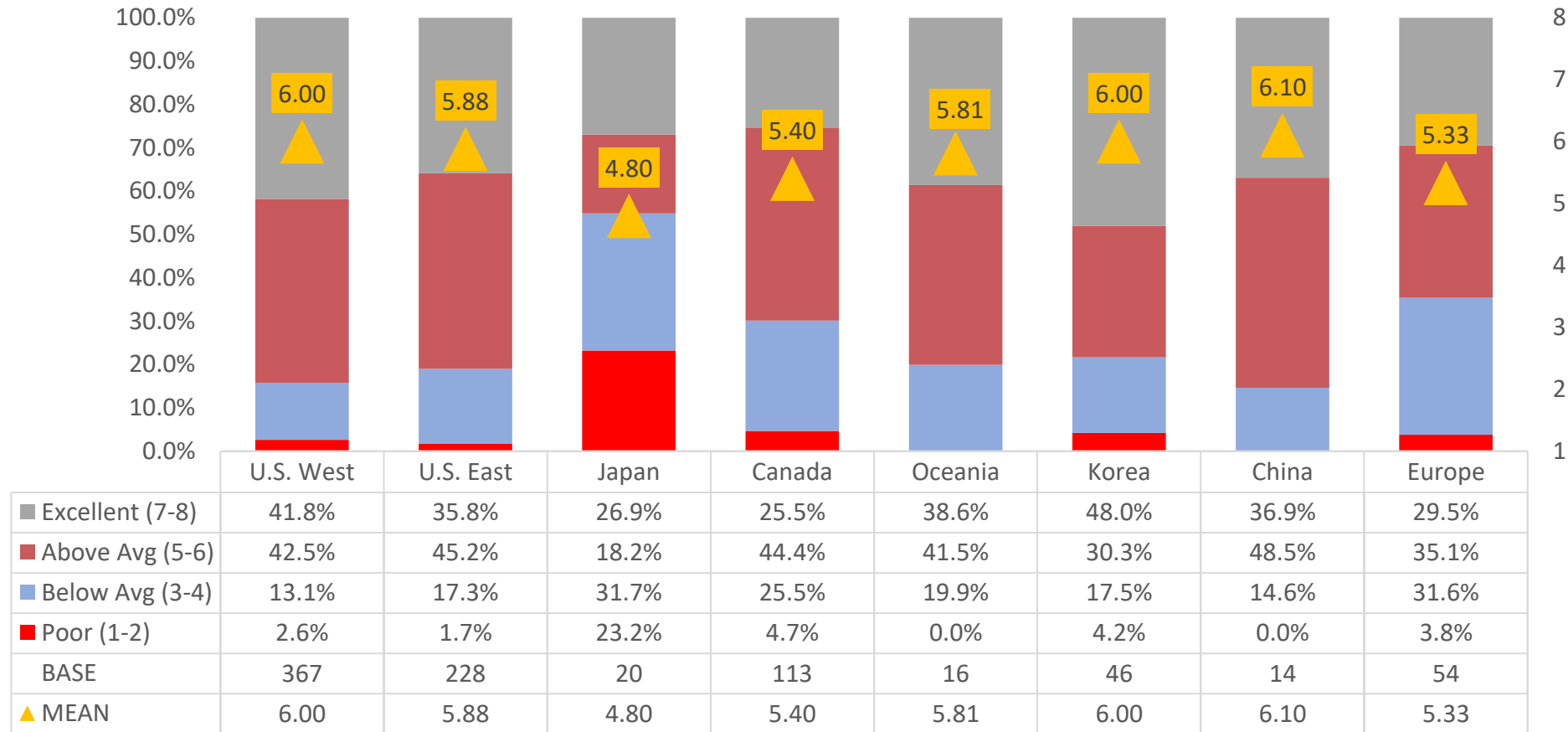
# VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



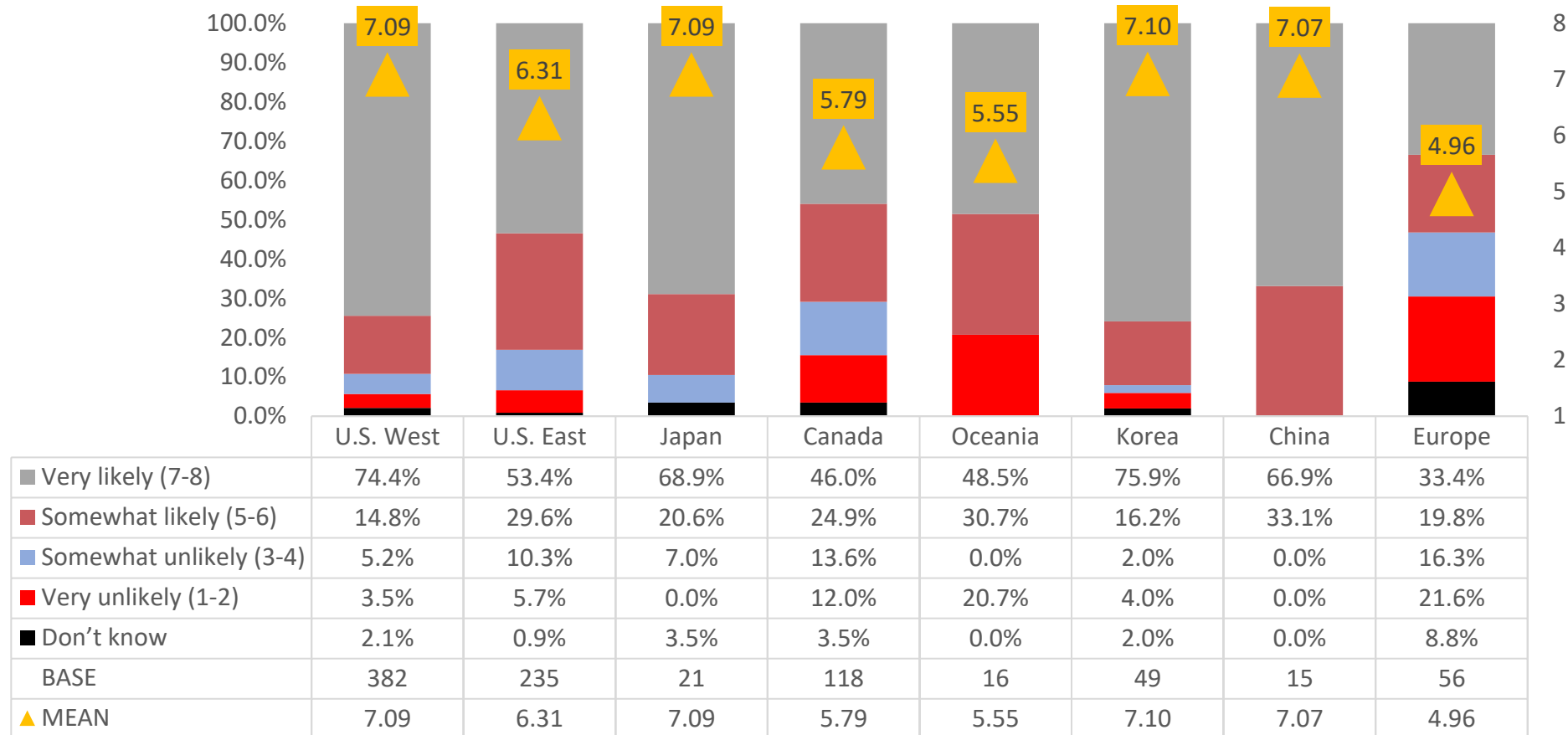
# VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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

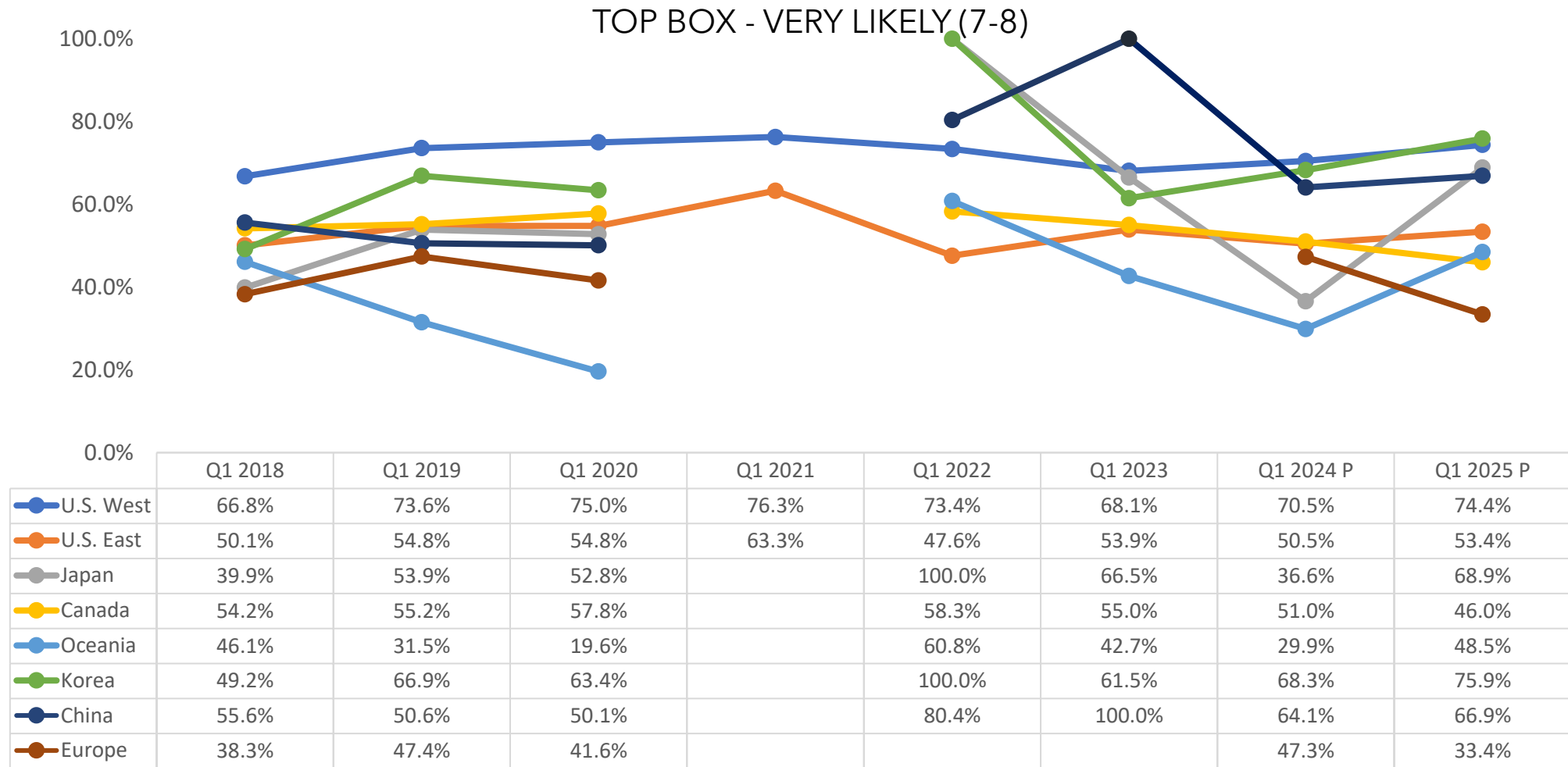


# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI‘I

8-pt Rating Scale  
8=Very likely/ 1=Very unlikely



# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

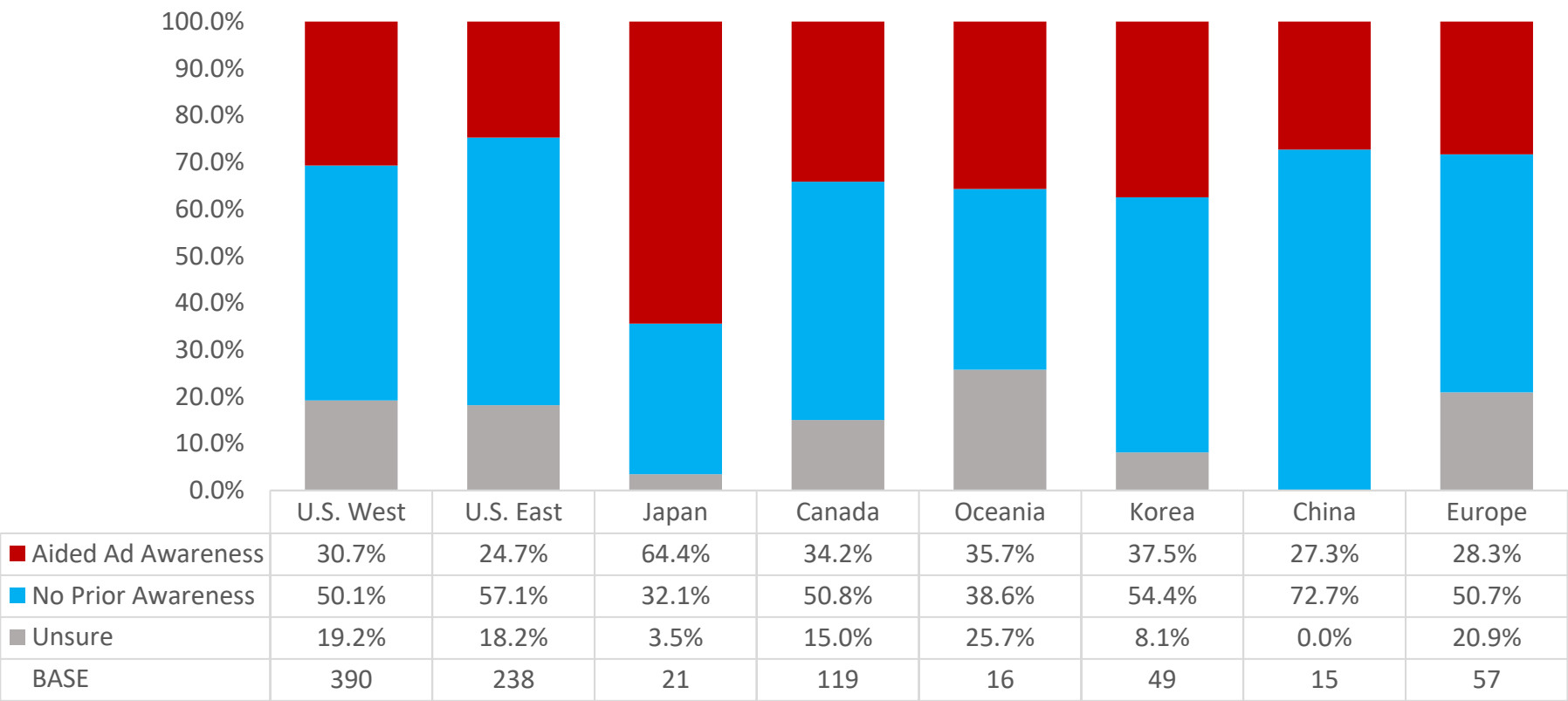


P= Preliminary Data

Q. How likely are you to visit the island of Hawai'i again in the next five years?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

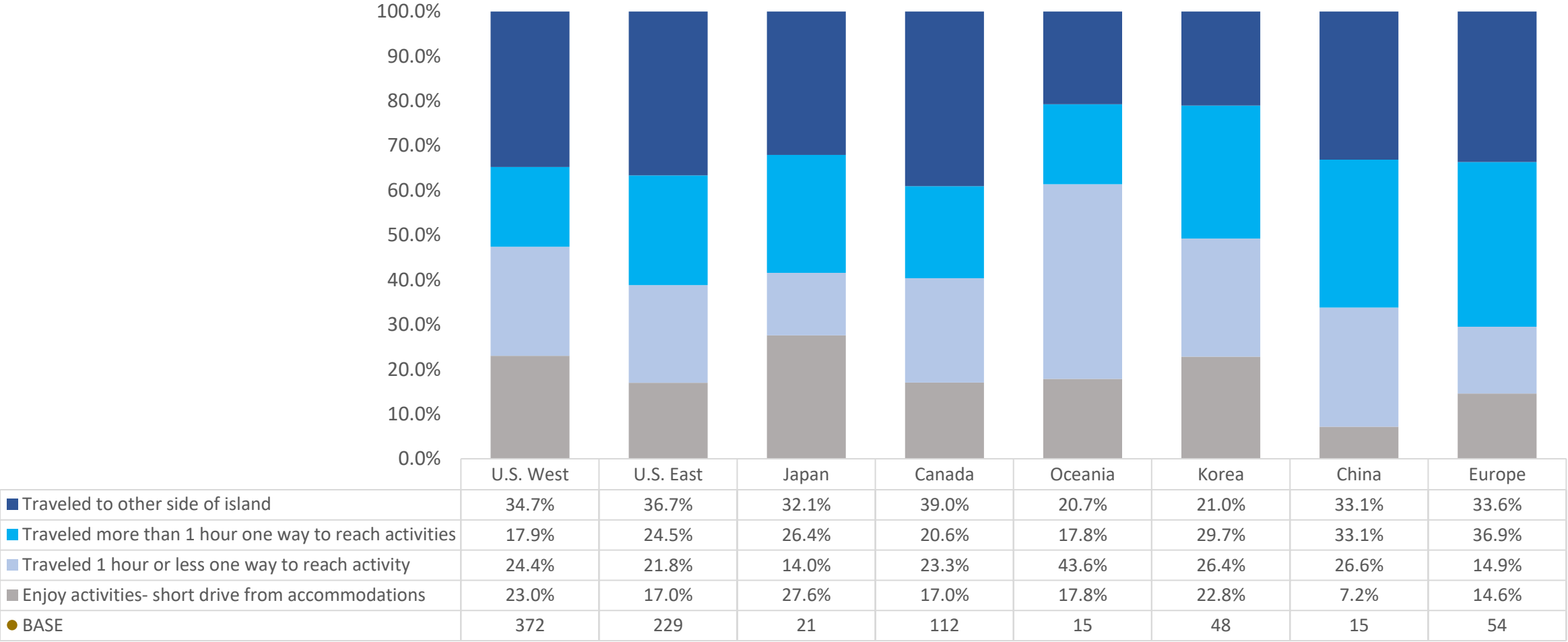
# AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



# MOTIVATING FACTORS - ISLAND OF HAWAI'I

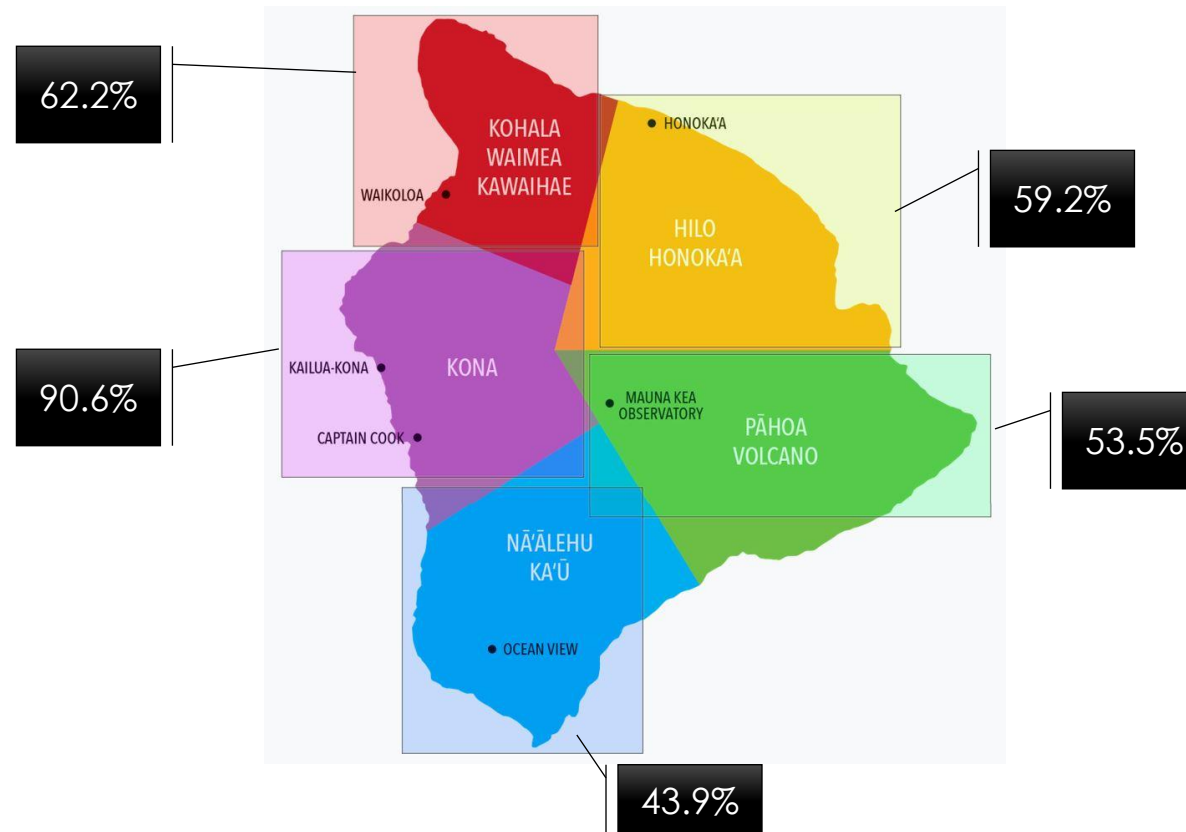
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	48.0%	59.0%	50.5%	50.0%	53.5%	73.4%	63.2%	61.7%
<b>Outdoor or sporting activities and events</b>	11.9%	14.8%	5.7%	17.8%	25.7%	13.0%	8.1%	10.6%
<b>Social media posts and videos</b>	16.9%	15.8%	26.4%	11.1%	35.7%	0.0%	22.2%	17.5%
<b>Hawaiian cultural experience and Hawaiian cultural events</b>	24.7%	28.3%	5.7%	21.2%	22.8%	20.1%	10.1%	15.6%
<b>Television programs or movies filmed in Hawai'i</b>	9.5%	12.8%	33.3%	18.0%	10.0%	6.5%	18.4%	24.8%
<b>Hawaiian music</b>	14.6%	13.3%	5.7%	15.8%	17.8%	0.0%	4.2%	14.2%
<b>Attend a festival or other event</b>	2.5%	3.8%	5.7%	3.4%	0.0%	0.0%	0.0%	3.5%
<b>BASE</b>	390	237	21	118	16	15	49	57

# TRAVEL ON ISLAND OF HAWAI‘I

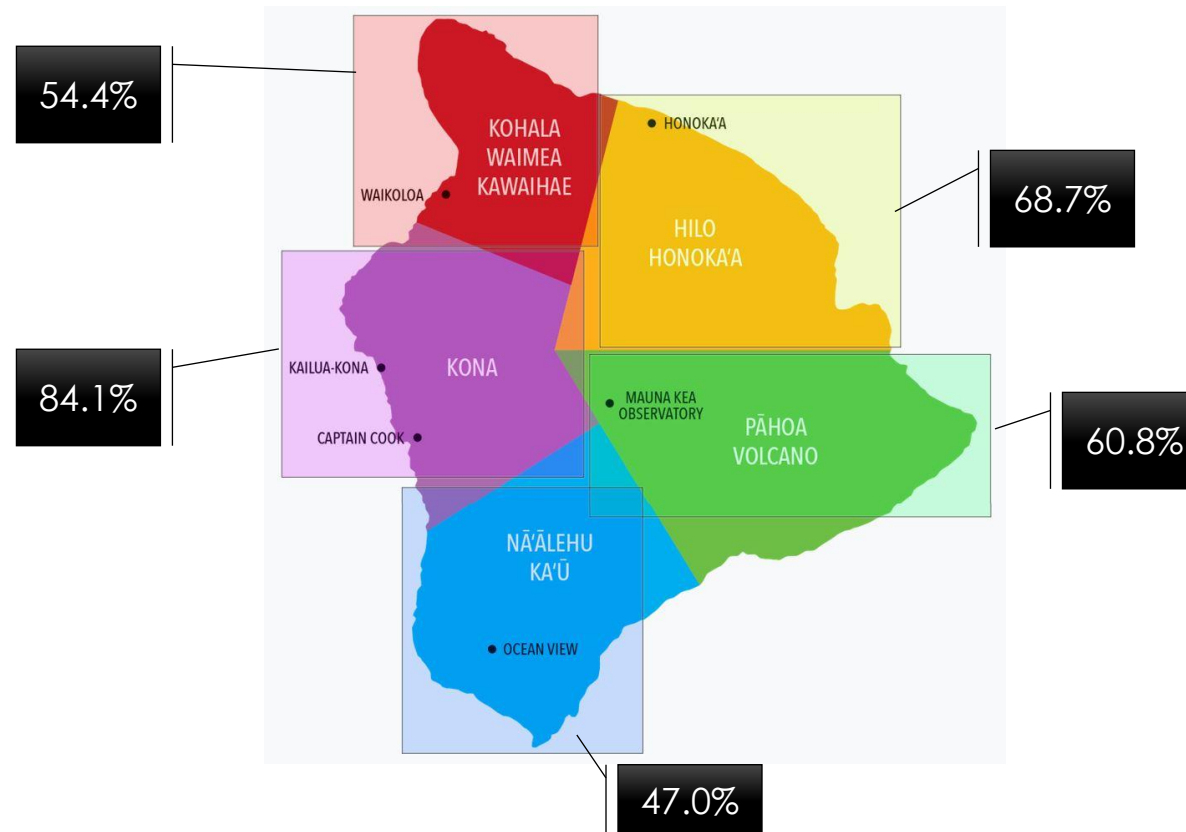




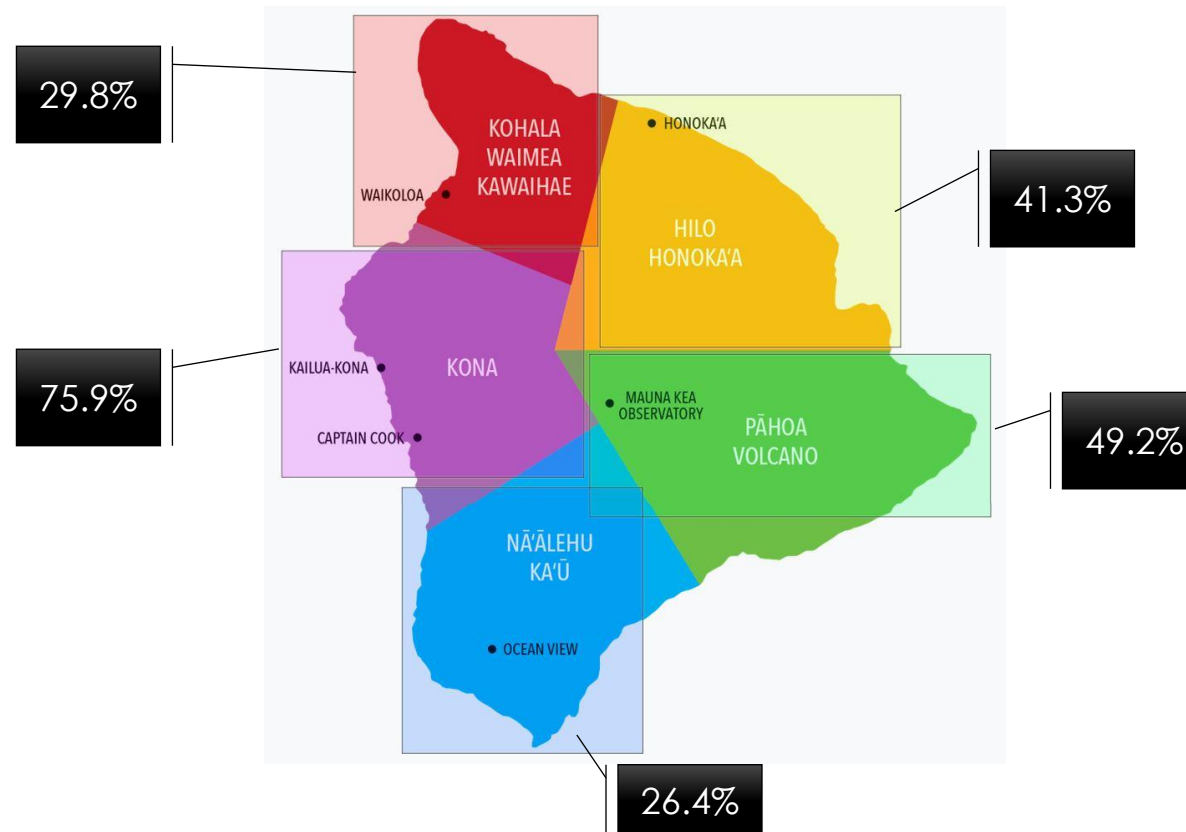
# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



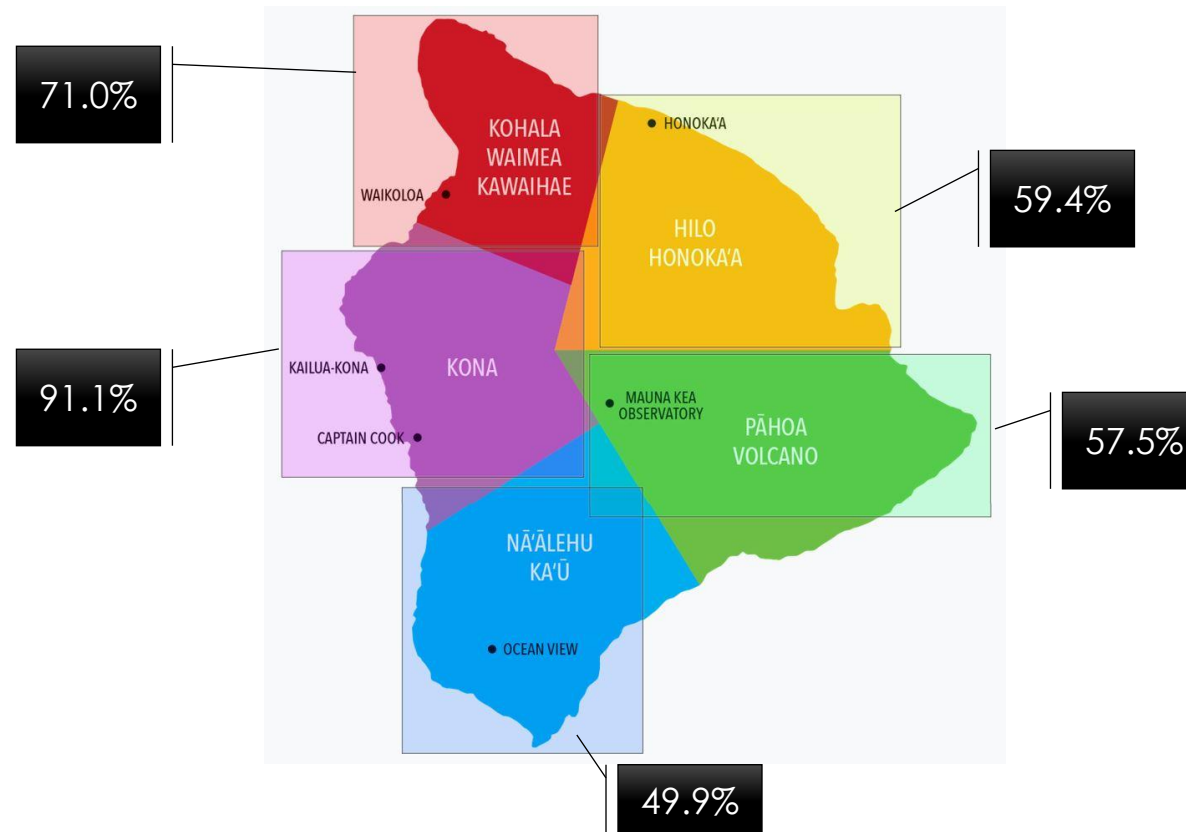
# AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



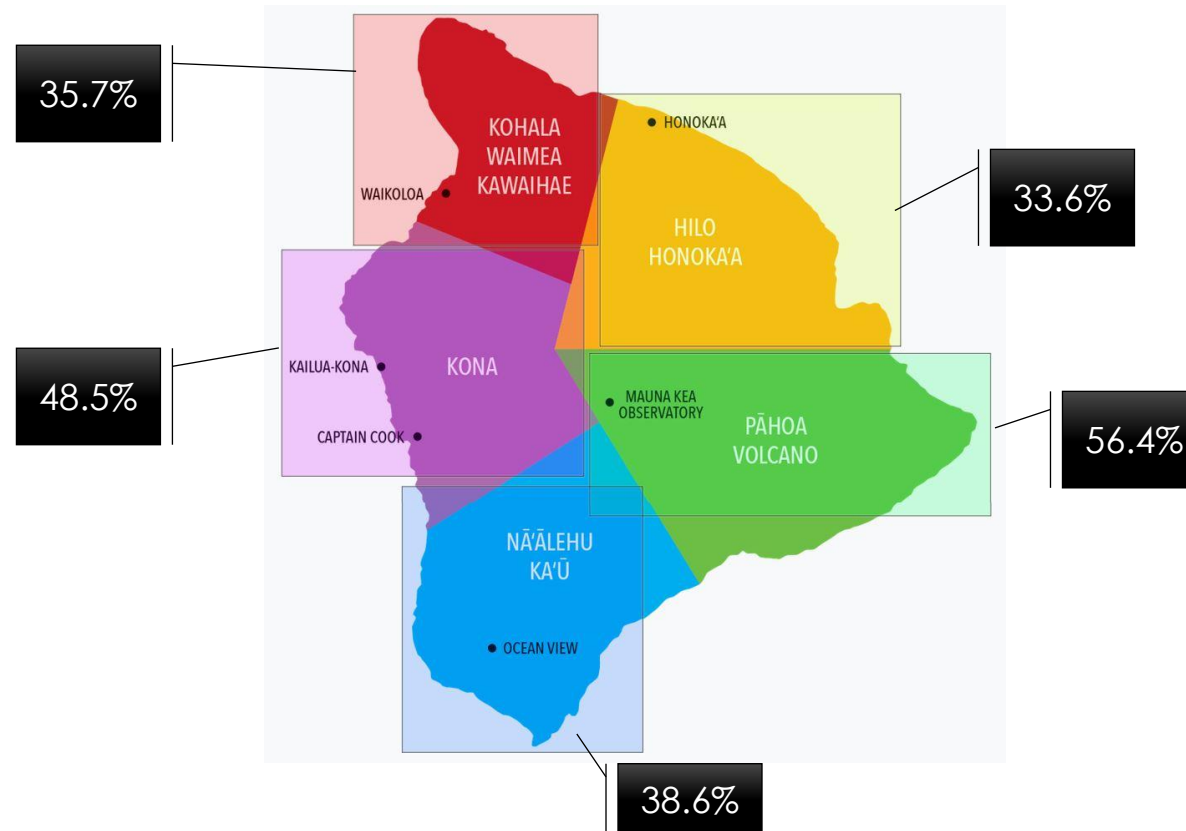
# AREAS VISITED ISLAND OF HAWAI'I JAPAN



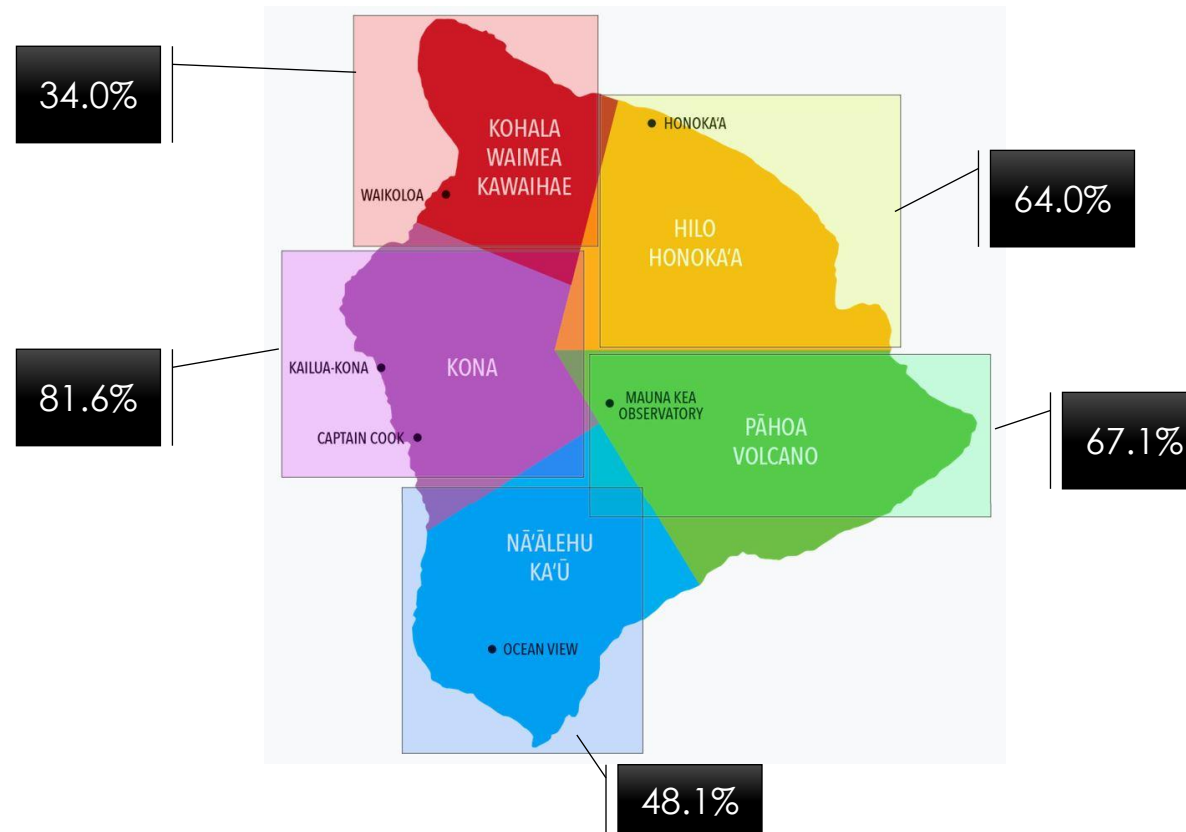
# AREAS VISITED ISLAND OF HAWAI'I CANADA



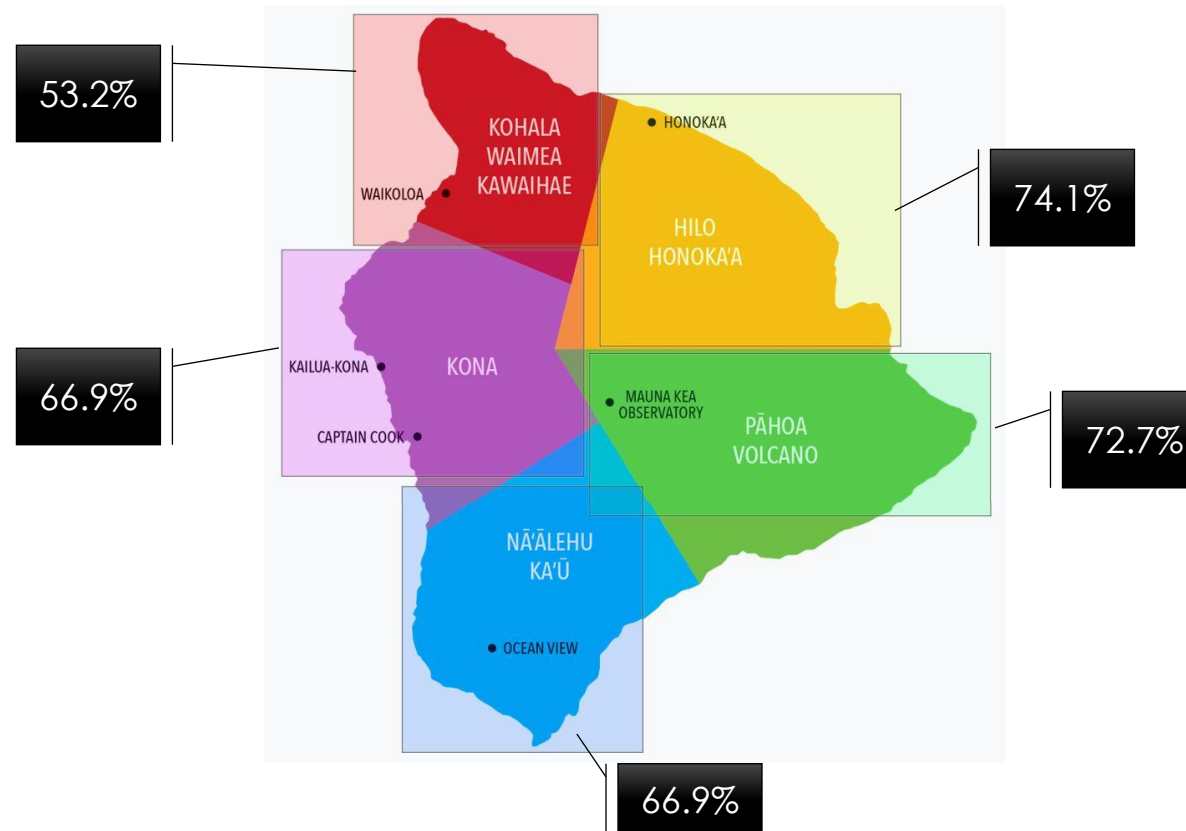
# AREAS VISITED ISLAND OF HAWAI'I OCEANIA



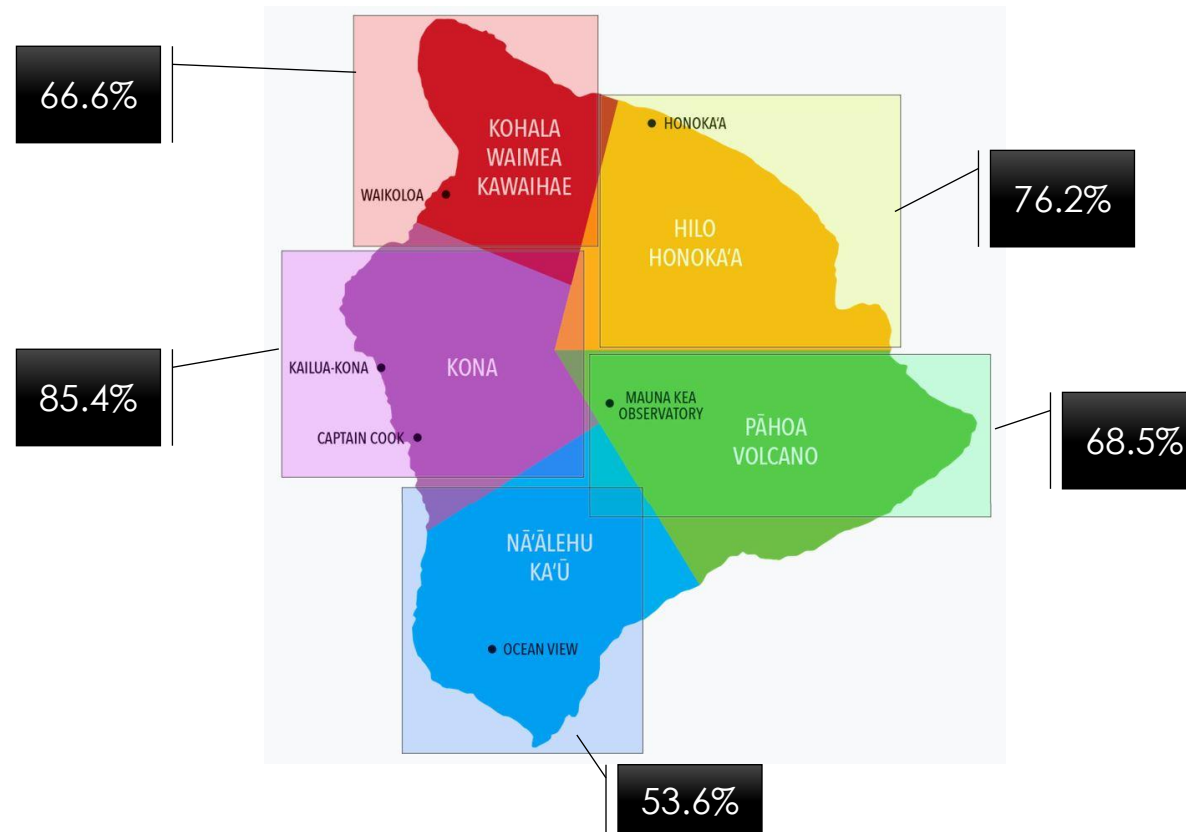
# AREAS VISITED ISLAND OF HAWAI'I KOREA



# AREAS VISITED ISLAND OF HAWAI'I CHINA

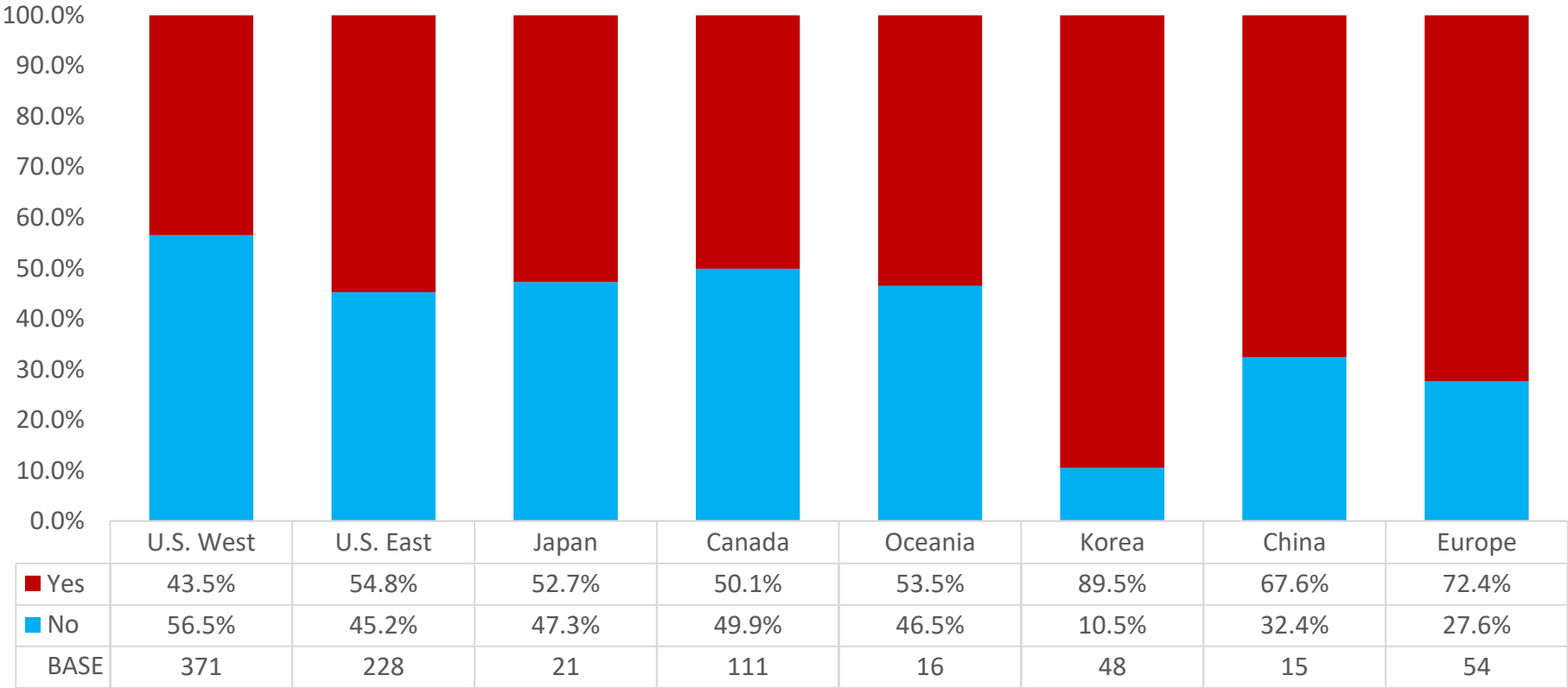


# AREAS VISITED ISLAND OF HAWAI'I EUROPE



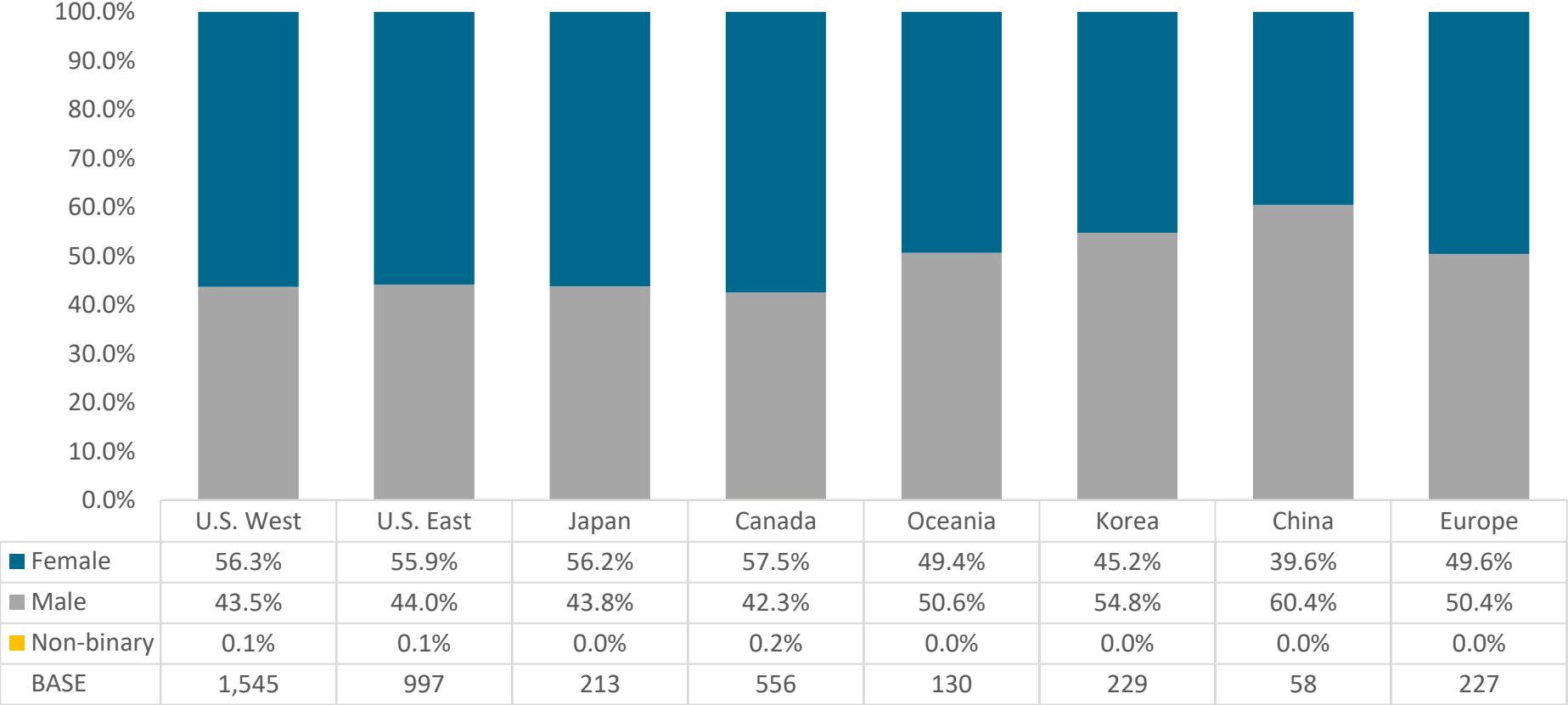


# VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI‘I

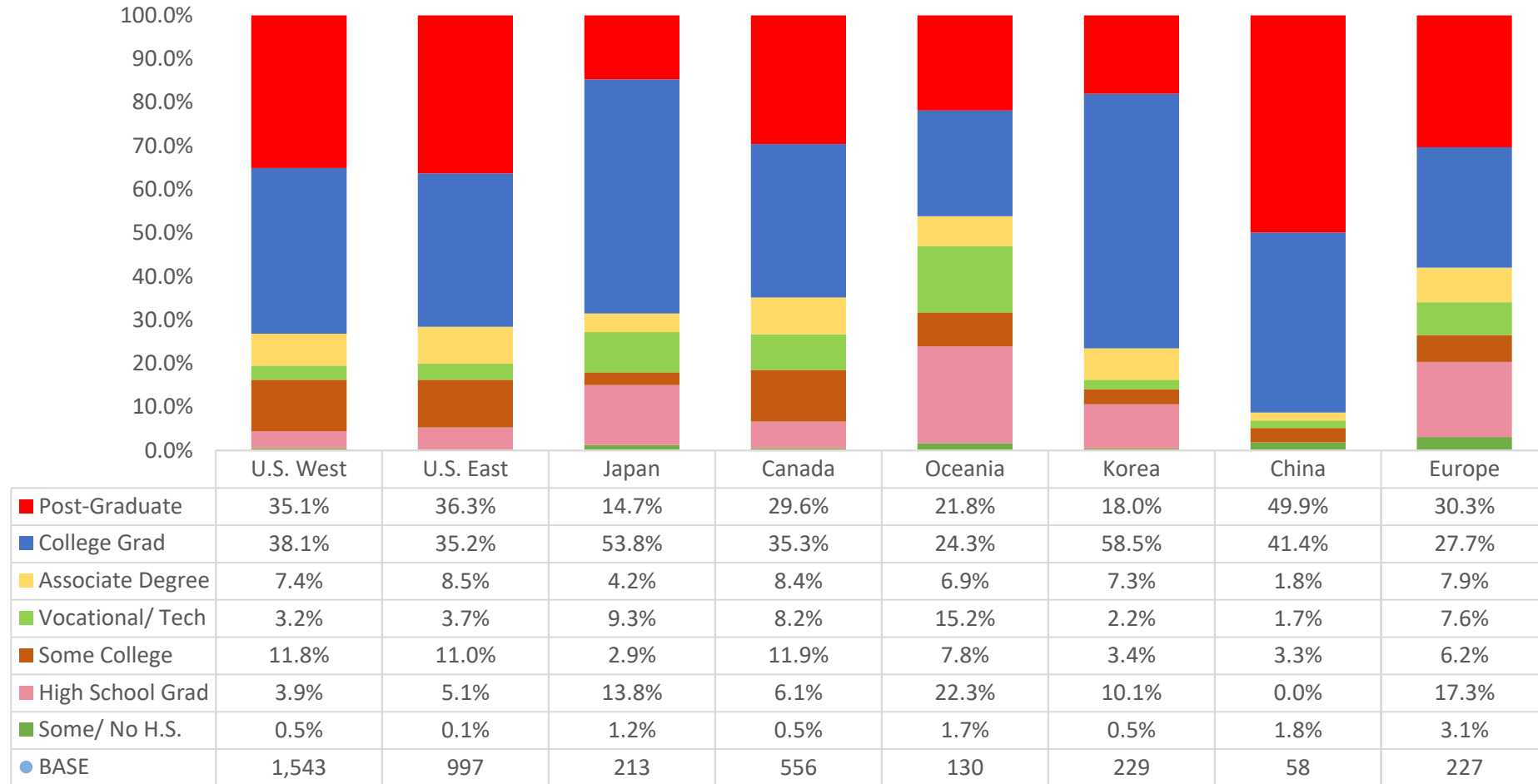


# Section 11 – Visitor Profile

# VISITOR PROFILE - GENDER



# VISITOR PROFILE - EDUCATION



# VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	3.9%	5.8%	4.5%	7.9%	19.8%
\$40,000 to \$59,999	4.1%	4.7%	7.4%	6.5%	10.8%
\$60,000 to \$79,999	6.6%	8.6%	9.1%	10.0%	10.3%
\$80,000 to \$99,999	10.3%	8.5%	11.7%	6.9%	13.5%
\$100,000 to \$124,999	11.2%	14.6%	12.1%	19.0%	8.0%
\$125,000 to \$149,999	10.5%	9.2%	12.0%	9.2%	10.7%
\$150,000 to \$174,999	9.2%	8.2%	7.7%	12.2%	7.6%
\$175,000 to \$199,999	7.2%	7.4%	7.5%	5.0%	4.9%
\$200,000 to \$249,999	11.0%	10.3%	10.9%	10.0%	5.3%
\$250,000 +	26.0%	22.8%	17.1%	13.4%	9.1%
BASE	1,521	987	547	130	224

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	15.5%
¥3.5 - ¥4.5 million	12.2%
¥4.5 - ¥5.5 million	5.7%
¥5.5 - ¥6.5 million	8.1%
¥6.5 - ¥7.5 million	5.4%
¥7.5 - ¥8.5 million	7.5%
¥8.5 - ¥10.0 million	11.7%
¥10.0 - ¥15.0 million	18.4%
¥15.0 - ¥20.0 million	6.6%
¥20.0 million +	8.9%
BASE	213

# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

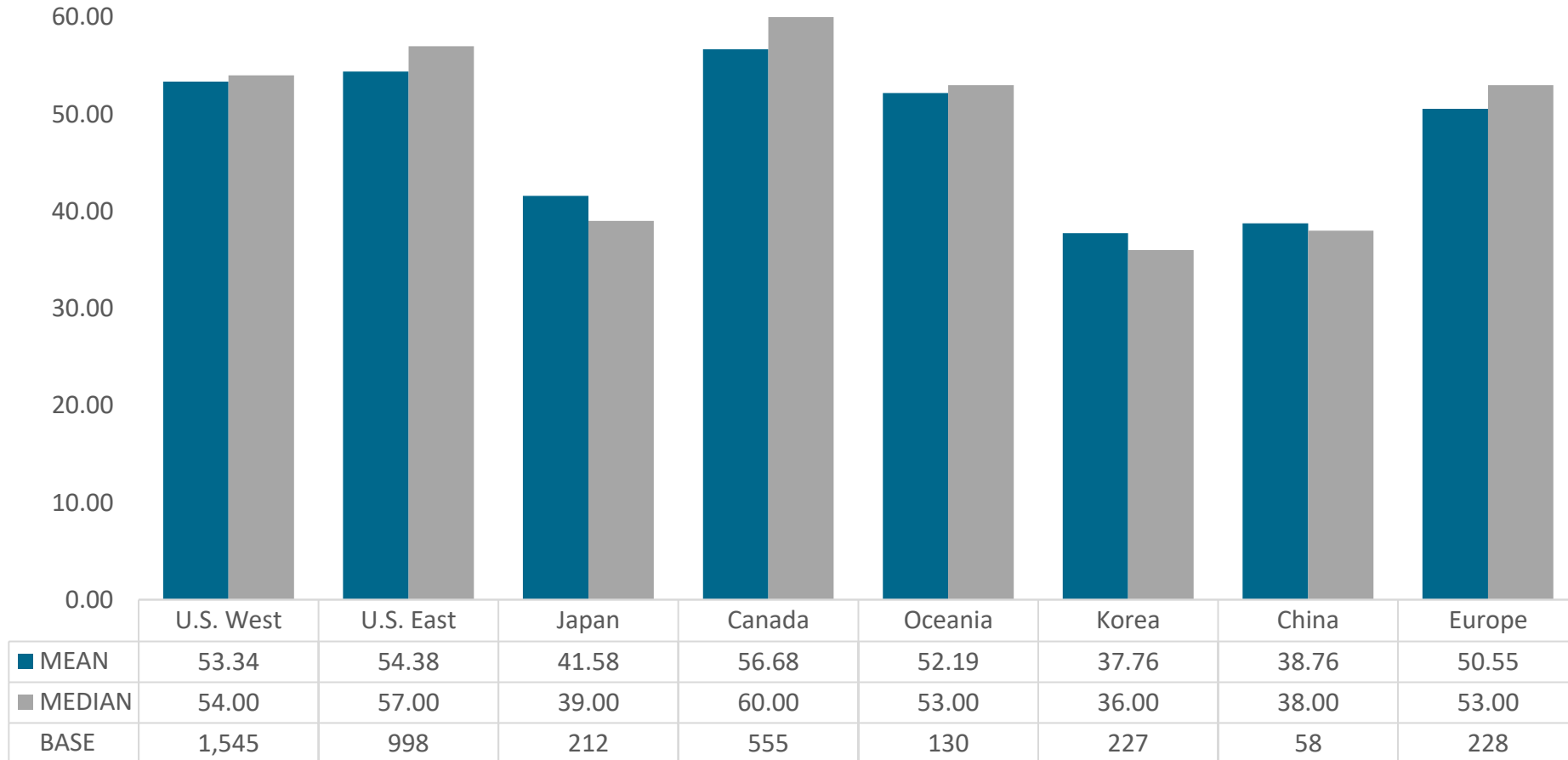
	Korean
< ₩16,305,000	13.7%
₩16,305,000 - ₩27,173,999	2.2%
₩27,174,000 - ₩38,041,999	8.2%
₩38,042,000 - ₩48,911,999	10.8%
₩48,912,000 - ₩59,781,999	9.2%
₩59,782,000 - ₩70,652,999	7.9%
₩70,653,000 - ₩81,520,999	6.9%
₩81,521,000 - ₩92,390,999	3.1%
₩92,391,000 - ₩103,259,999	4.9%
₩103,260,000 - ₩149,999,999	15.0%
₩150,000,000 - ₩199,999,999	8.2%
₩200,000,000+	9.9%
BASE	227

# VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

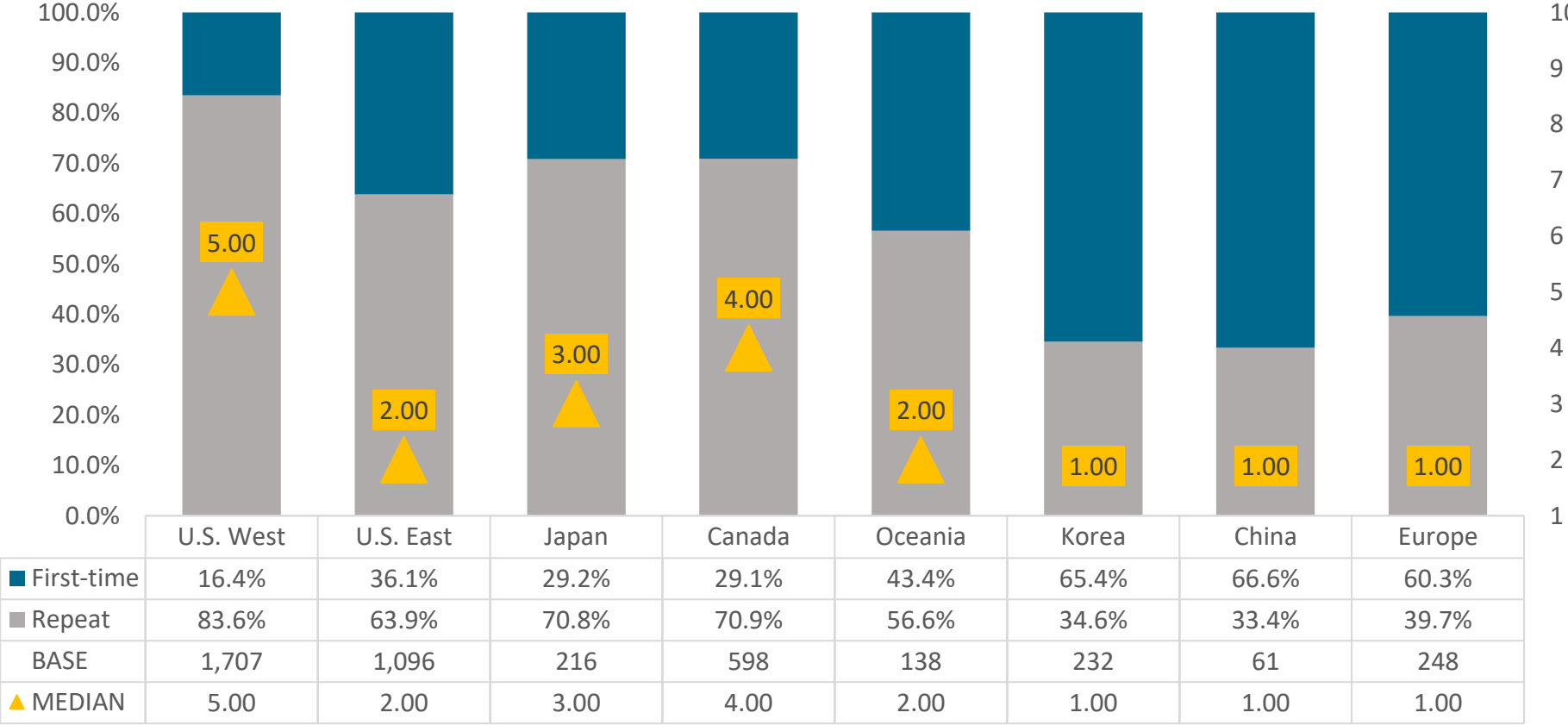
	China
<¥250,799	15.7%
¥250,800 – ¥376,099	19.2%
¥376,100 – ¥501,399	16.8%
¥501,400 – ¥626,799	12.0%
¥626,800 – ¥783,499	1.7%
¥783,500 – ¥940,199	12.0%
¥940,200 – ¥1,096,899	1.8%
¥1,096,900 - ¥1,253,599	3.7%
¥1,253,600 – ¥1,560,799	1.7%
¥1,560,800+	15.3%
BASE	58



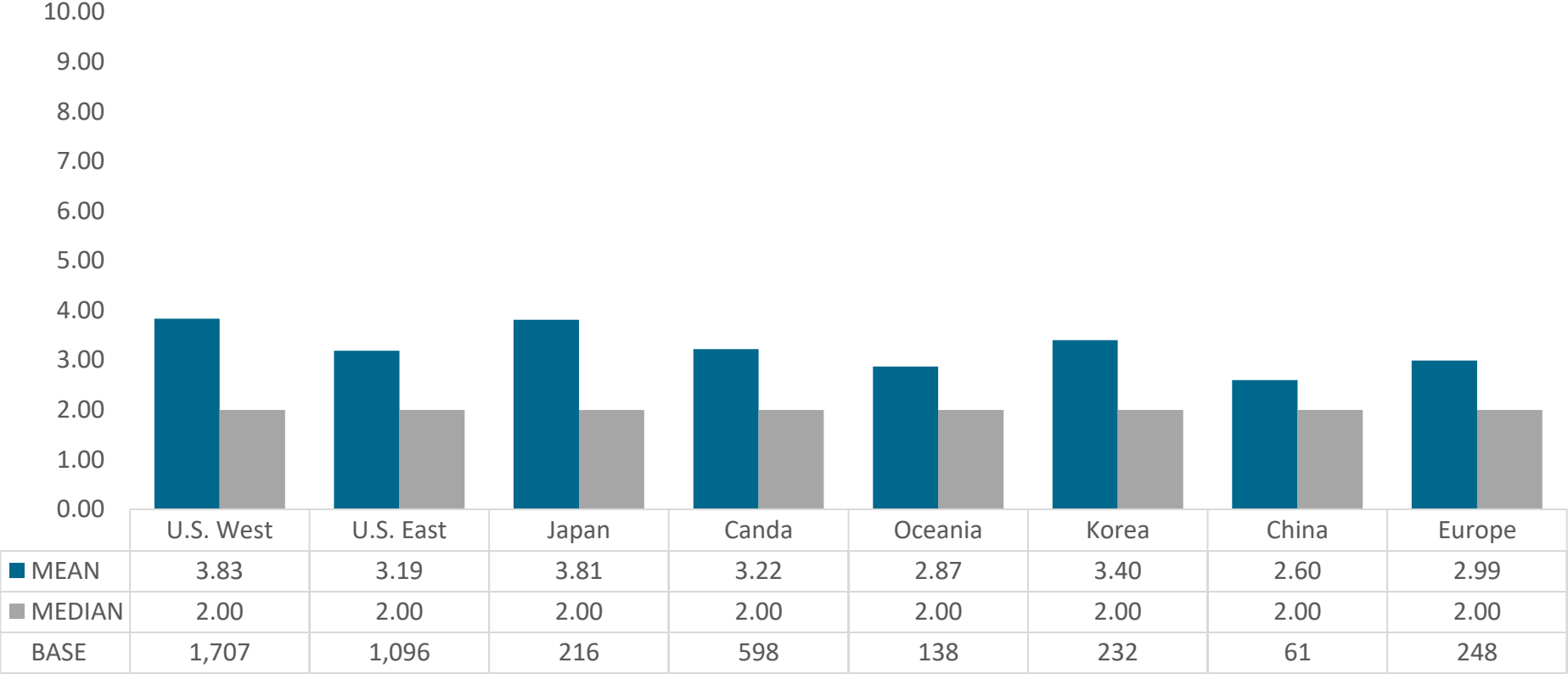
# VISITOR PROFILE - AGE



# VISITOR PROFILE - TRIPS TO HAWAI‘I



# VISITOR PROFILE - TRAVEL PARTY SIZE



# VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>My spouse</b>	61.0%	59.3%	53.5%	68.0%	64.9%	66.6%	37.5%	47.9%
<b>Other adult members of my family</b>	26.5%	26.6%	25.1%	27.2%	26.2%	21.3%	27.5%	16.6%
<b>My child(ren)/ grandchild(ren) under 18</b>	26.1%	15.7%	14.8%	21.7%	26.2%	19.4%	13.5%	7.2%
<b>My friends/ associates</b>	15.8%	15.3%	13.7%	15.2%	7.2%	10.0%	11.8%	19.7%
<b>Myself only (traveled alone/ no one else)</b>	9.8%	11.9%	10.8%	8.2%	11.5%	4.9%	19.9%	14.9%
<b>My girlfriend/ boyfriend</b>	5.9%	5.8%	2.1%	3.0%	4.7%	2.5%	4.8%	8.1%
<b>Same gender partner</b>	1.0%	0.7%	0.9%	1.2%	0.0%	0.8%	0.0%	0.8%
<b>BASE</b>	1,707	1,096	216	598	138	232	61	248

# Section 12 – 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 table summarizes the number of surveys completed for the island of O'ahu.

MMA	Completed	Margin of Error +
U.S. West	699	3.71
U.S. East	549	4.18
Japan	202	6.90
Canada	276	5.90
Oceania	128	8.66
Korea	223	6.56
China	57	12.98
Europe	182	7.26
All MMAs	2,316	2.04

\* Margins of error are presented at the 95% 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 table summarizes the number of surveys completed for the island of Kaua'i.

MMA	Completed	Margin of Error +
U.S. West	193	7.05
U.S. East	206	6.83
Japan	4	49.00
Canada	106	9.52
Oceania	3	56.58
Korea	8	34.65
China	1	98.00
Europe	52	13.59
All MMAs	573	4.09

\* Margins of error are presented at the 95% 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 table summarizes the number of surveys completed for the island of Maui.

MMA	Completed	Margin of Error $\pm$
U.S. West	542	4.21
U.S. East	410	4.84
Japan	6	40.01
Canada	236	6.38
Oceania	10	30.99
Korea	18	23.10
China	9	32.67
Europe	94	10.11
All MMAs	1,325	2.69

\* Margins of error are presented at the 95% 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 table summarizes the number of surveys completed for the island of Hawai‘i.

MMA	Completed	Margin of Error +
U.S. West	405	4.87
U.S. East	298	5.68
Japan	21	21.39
Canada	143	8.20
Oceania	17	23.77
Korea	51	13.72
China	16	24.50
Europe	80	10.96
All MMAs	1,031	3.05

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