

Visitor Satisfaction Study

2018 ANNUAL REPORT

Prepared for:
Hawai'i Tourism Authority

METHODOLOGY – OVERALL

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

| MMA | Completed | Margin of Error \pm | Response Rate |
|-----------|-----------|-----------------------|---------------|
| U.S. West | 8,348 | 1.07 | 16.66 |
| U.S. East | 8,409 | 1.07 | 18.11 |
| Japan | 5,435 | 1.33 | 38.39 |
| Canada | 5,384 | 1.34 | 29.05 |
| Europe | 1,527 | 2.51 | 25.90 |
| Oceania | 2,228 | 2.08 | 22.53 |
| China | 806 | 3.45 | 16.10 |
| Korea | 1,603 | 2.45 | 43.67 |
| | | | |
| All MMAs | 33,740 | .53 | 22.28 |

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

METHODOLOGY – OVERALL (cont.)

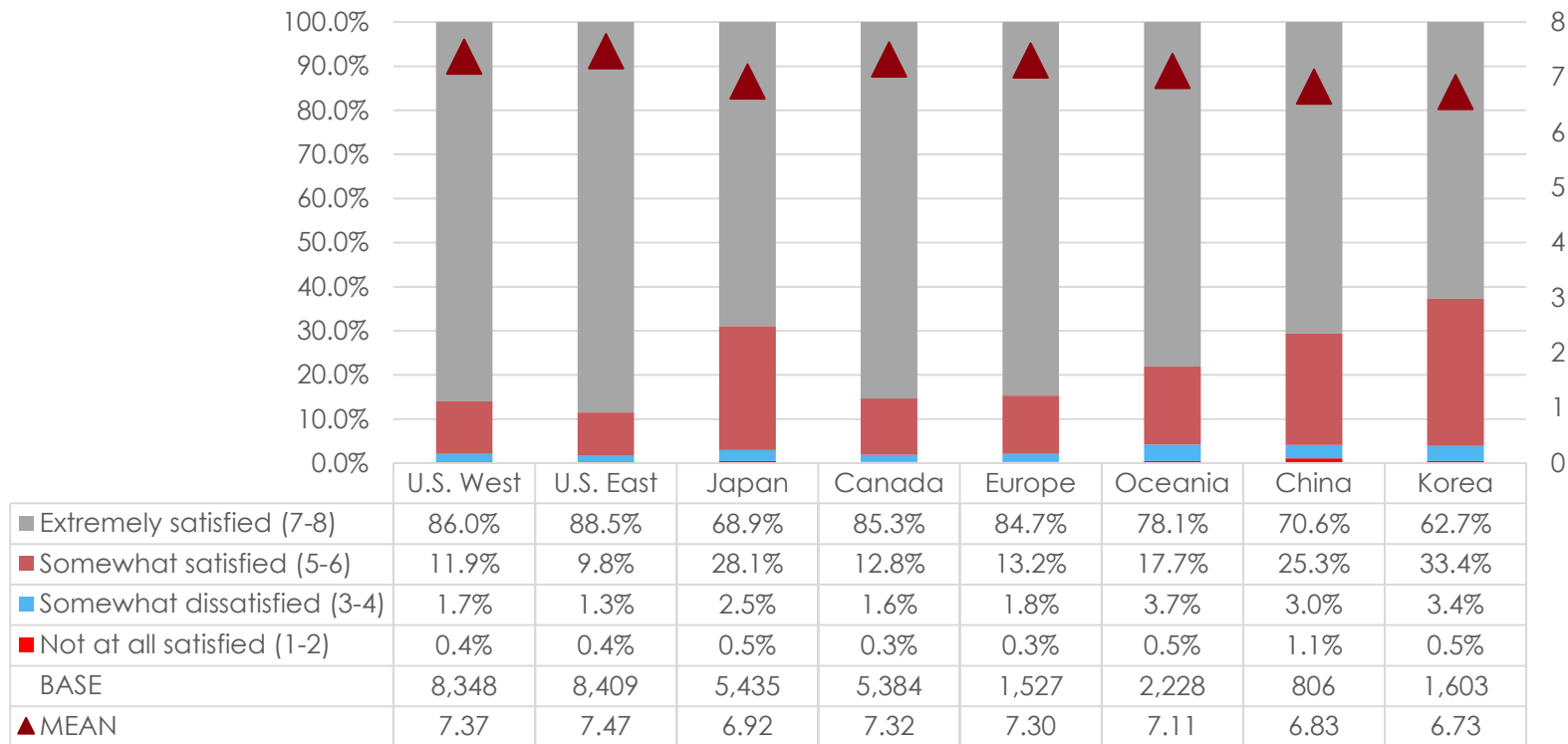
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also collected via intercept surveys at the Daniel K. Inouye International Airport, Ellison Onizuka Kona International Airport and Kahului Airport using iPad tablets among departing Chinese, Japanese and Korean visitors. Data collected via email and from the iPad intercept surveys were merged to form a single database for analysis.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Data from all MMAs were reported as weighted data based on weights generated for 2018 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

SECTION – VISITOR SATISFACTION

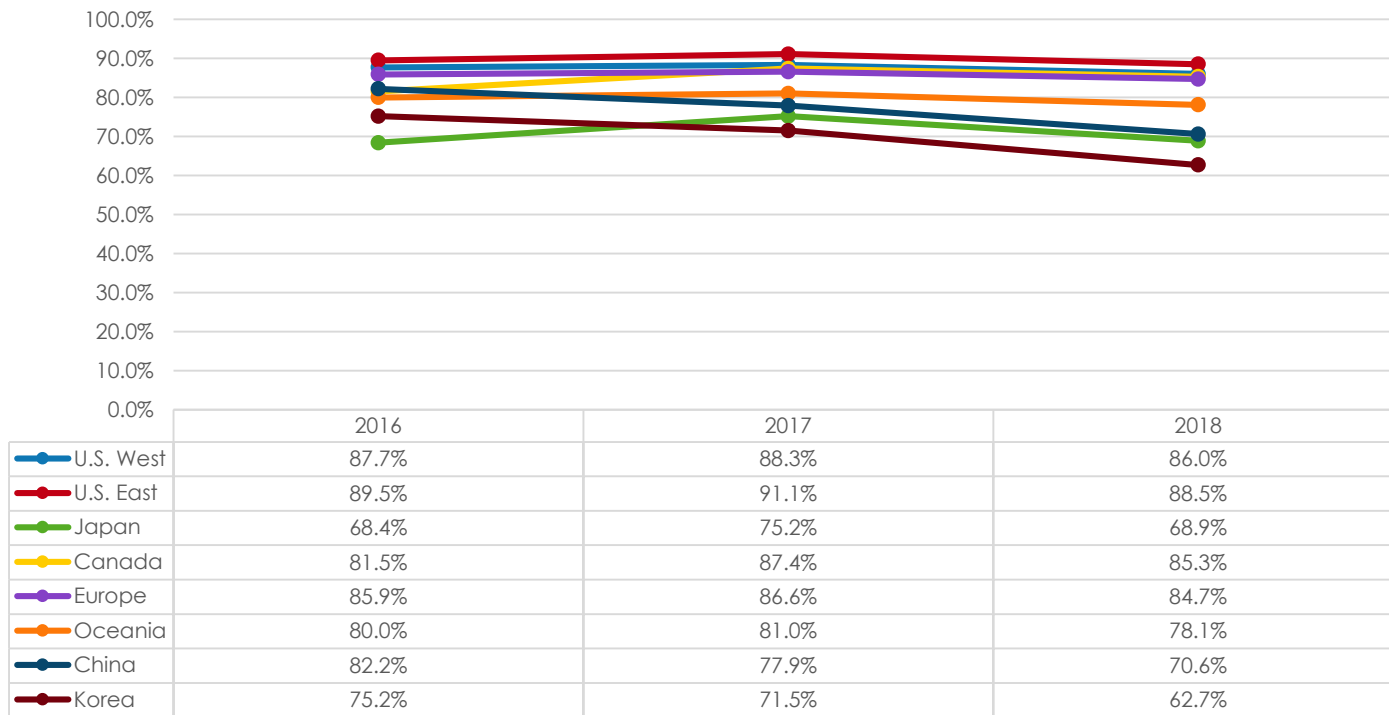
OVERALL SATISFACTION – MOST RECENT VISIT

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



OVERALL SATISFACTION – MOST RECENT VISIT

TRACKING – TOP BOX “EXTREMELY SATISFIED” (7-8)



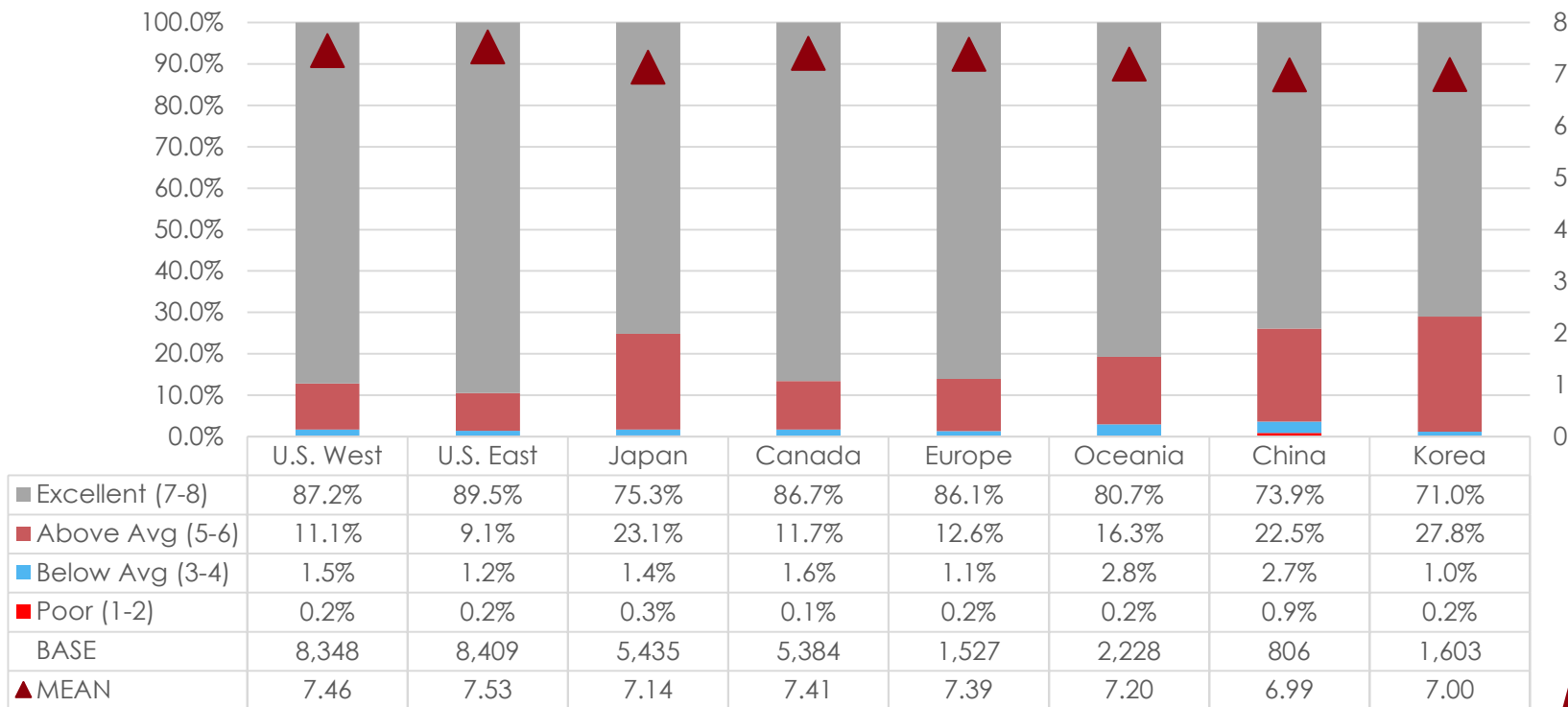
OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Female visitors from the following areas tend to provide higher levels of satisfaction than males: U.S. West, U.S. East, Canada, and Oceania.
- Korean males are more satisfied with their trip than were Korean females.
- Chinese visitors who have obtained a college degree express higher levels of satisfaction than do those visitors from China that do not have degrees.
- Japanese visitors who traveled to multiple islands during their trip express higher levels of overall satisfaction than do those whose trip included just a single island. This same trend was also evident among Chinese visitors.
- Those in larger travel parties in the following MMAs express higher levels of satisfaction: U.S. West, U.S. East, and Japan.

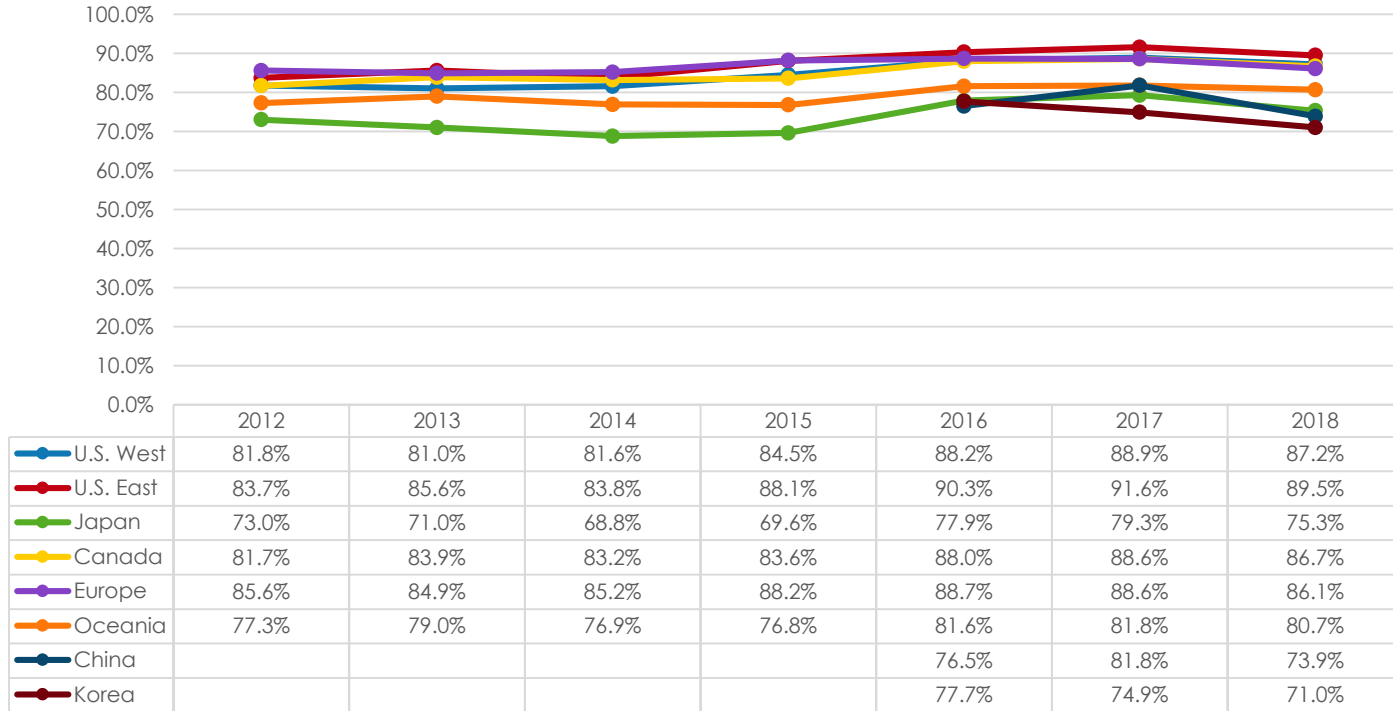
SATISFACTION – STATE OF HAWAI'I BY MMA

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



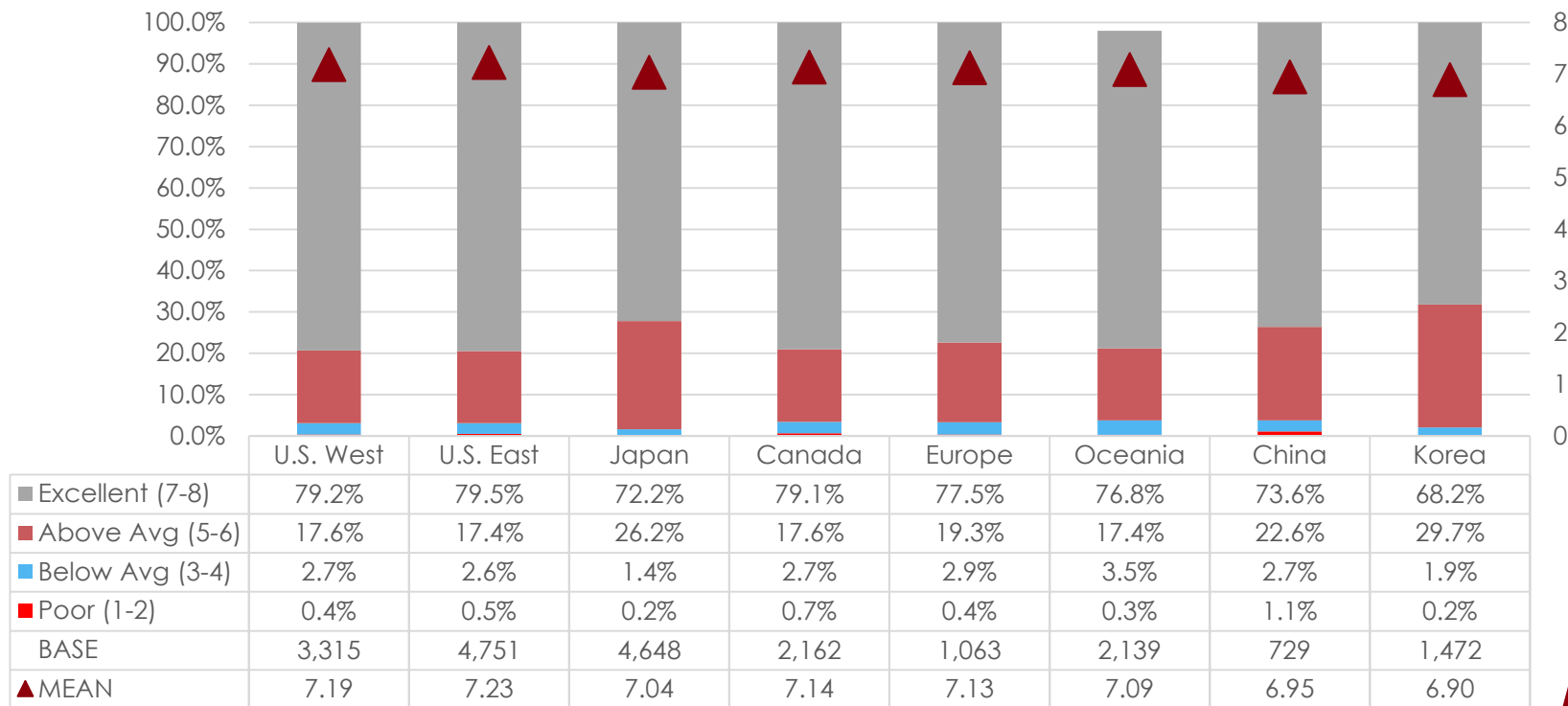
SATISFACTION – STATE OF HAWAI‘I BY MMA

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



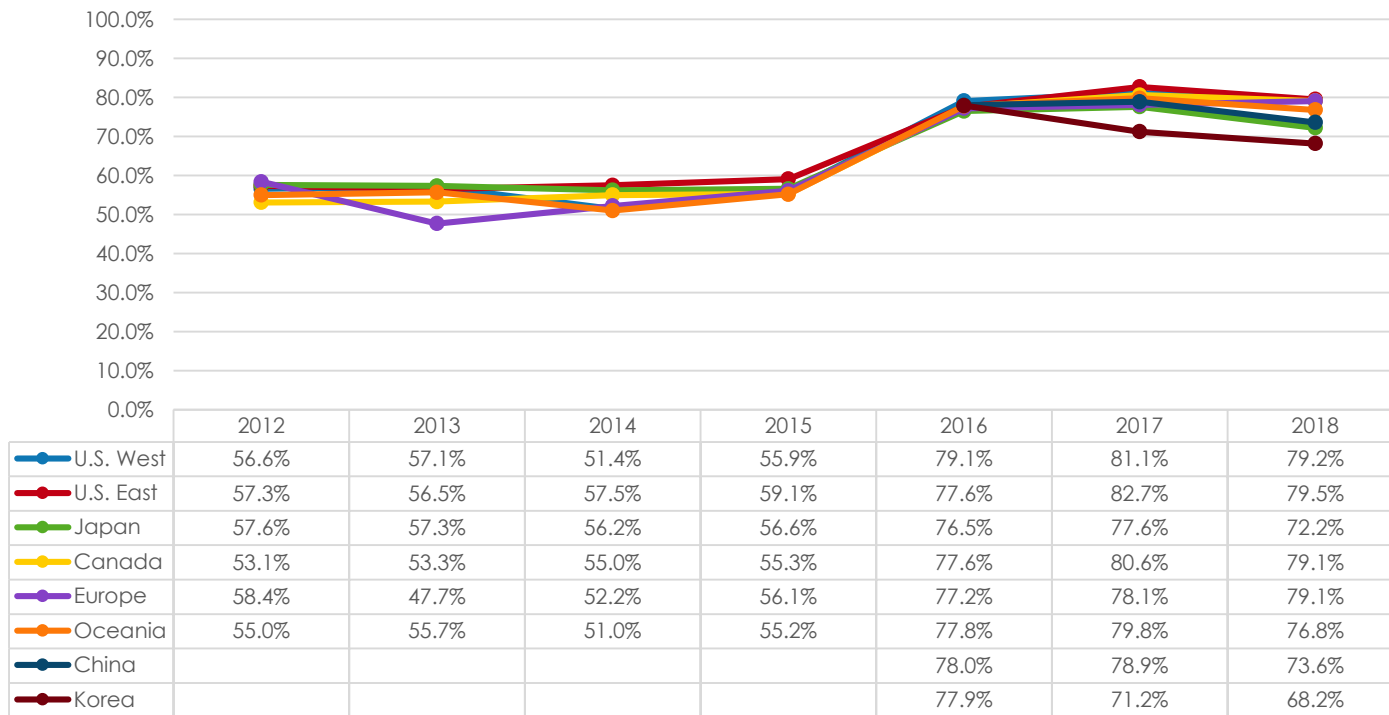
SATISFACTION – O‘AHU BY MMA

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



SATISFACTION – O‘AHU BY MMA

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



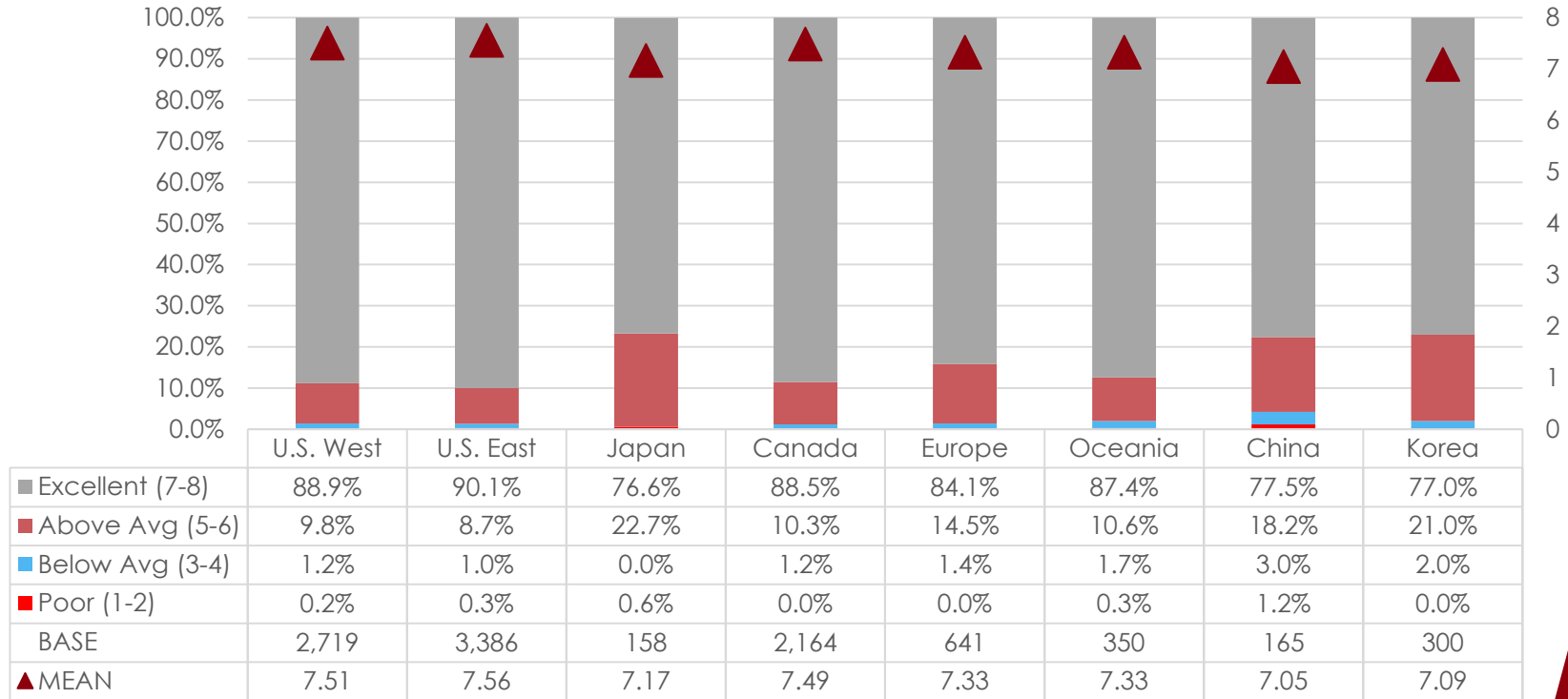
SATISFACTION – O‘AHU BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Among U.S. West and U.S. East visitors, those who are less affluent tended to be more satisfied overall with their visit on O‘ahu.
- When segmented by gender we find that females visiting from the Mainland U.S. are more satisfied with their visit to O‘ahu than were their male counterparts.

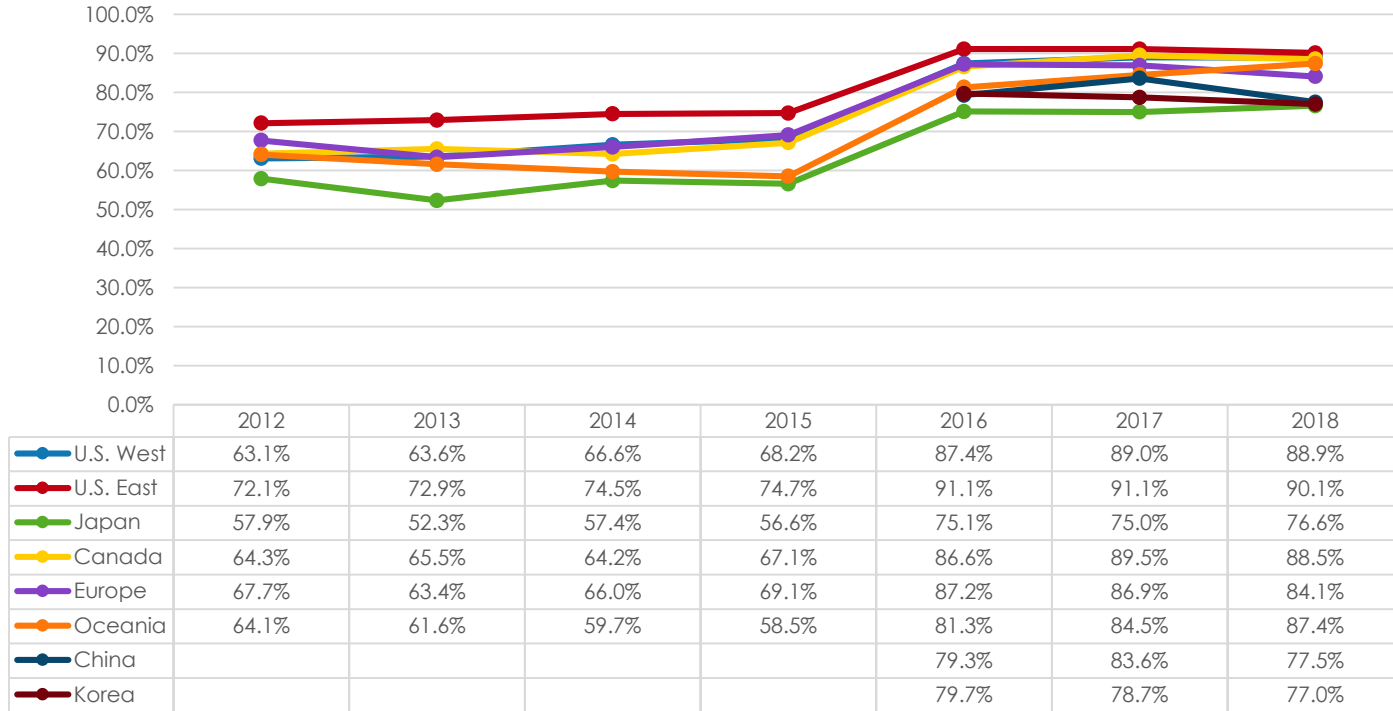
SATISFACTION – MAUI BY MMA

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



SATISFACTION – MAUI BY MMA

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



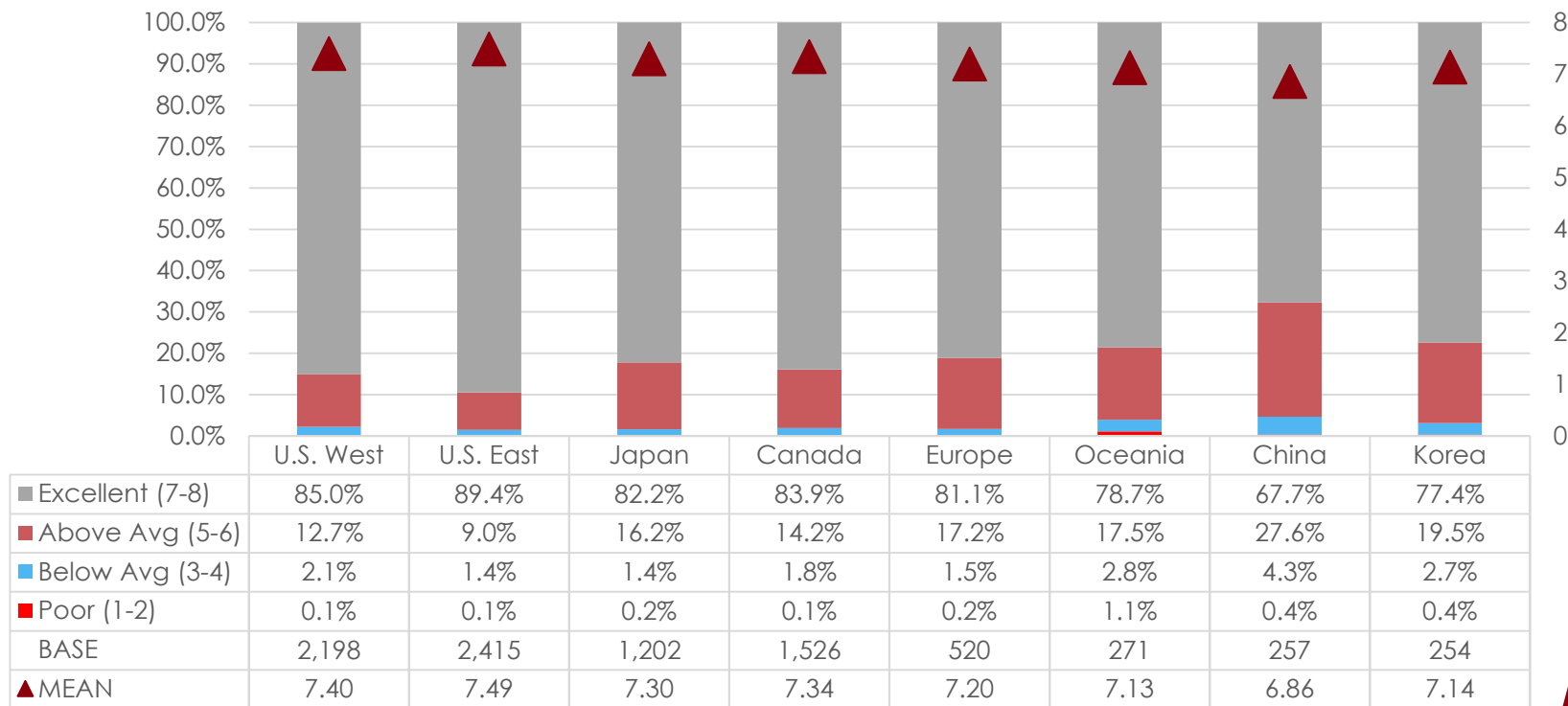
SATISFACTION – MAUI BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- When segmented by gender we find that females visiting from the Mainland U.S. and Canada are more satisfied with their visit to Maui than were their male counterparts.
- Those traveling to Maui in larger travel parties (3+) from U.S. West tended to give higher satisfaction scores than those traveling to Maui by themselves or with just one other travel partner.

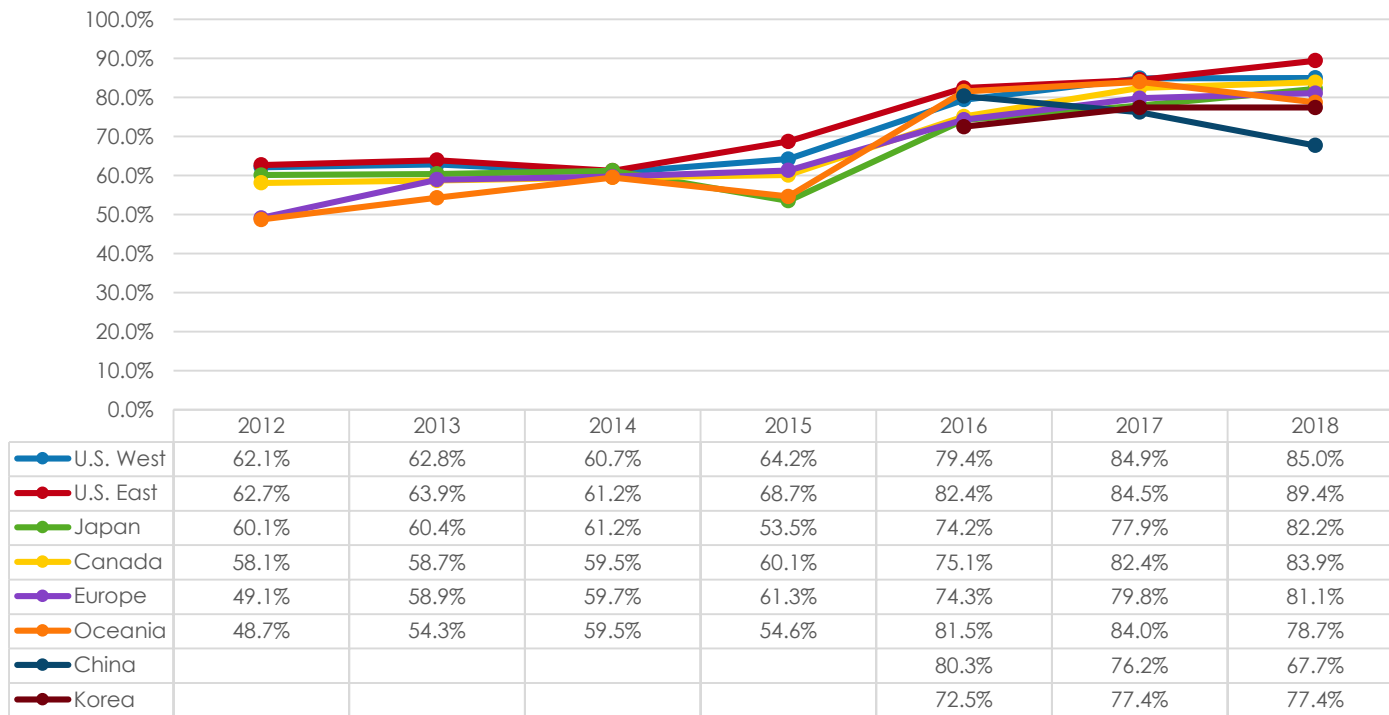
SATISFACTION – HAWAI'I ISLAND BY MMA

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



SATISFACTION – HAWAI‘I ISLAND BY MMA

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



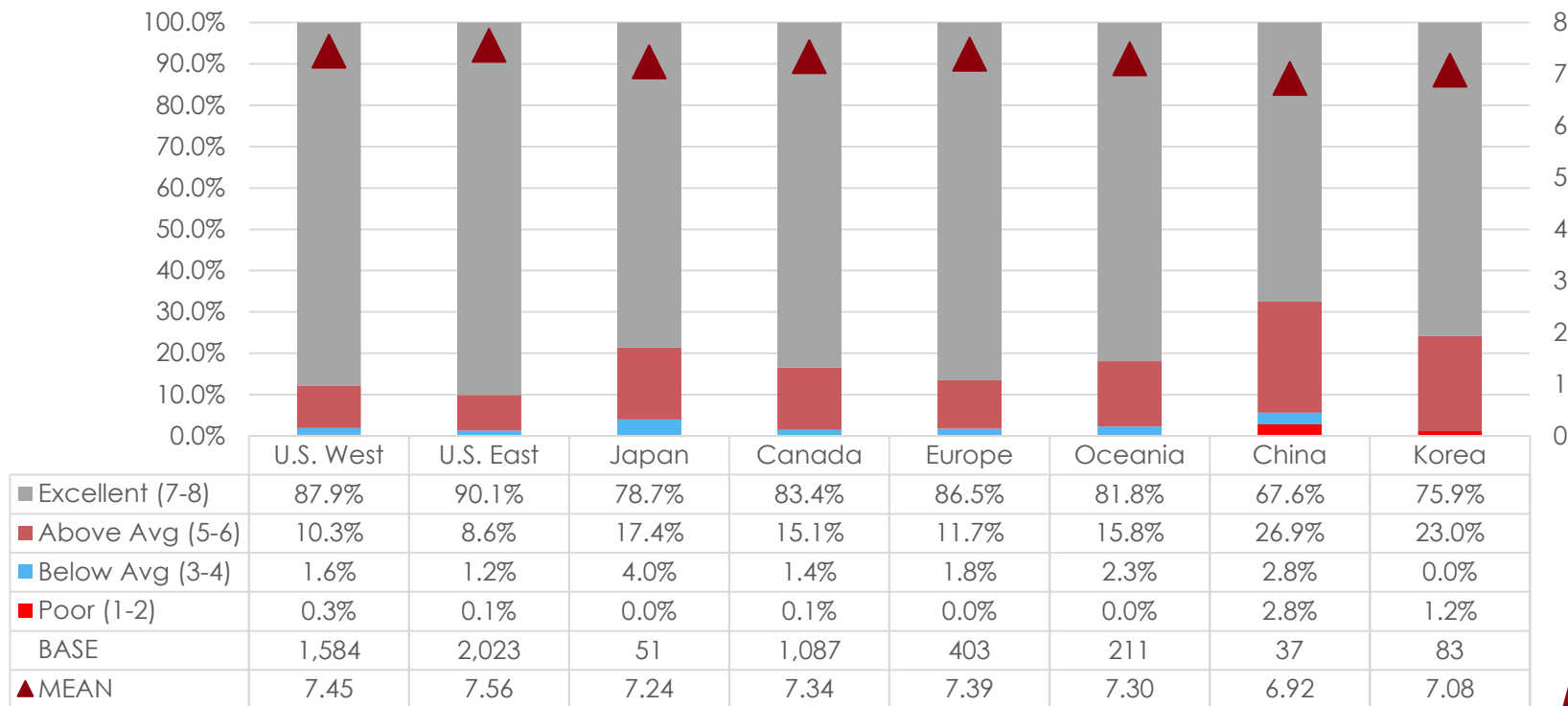
SATISFACTION – HAWAI'I ISLAND BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- When segmented by gender we find that females visiting from the U.S. West are more satisfied with their visit to the Island of Hawai'i than were their male counterparts.
- Among Canadian and Japanese visitors by age distribution, we find travelers from these MMA between the ages of 35-49 were the most satisfied overall.

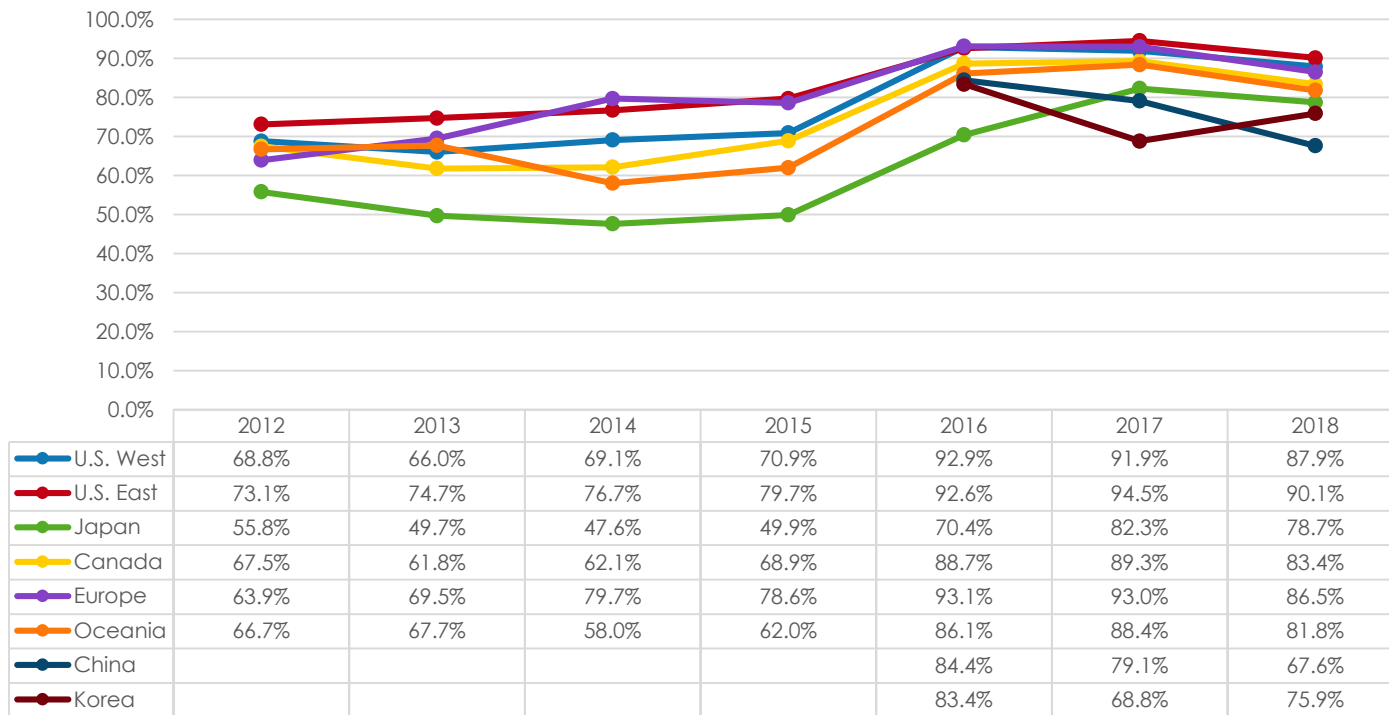
SATISFACTION – KAUAI BY MMA

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



SATISFACTION – KAUAI BY MMA

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



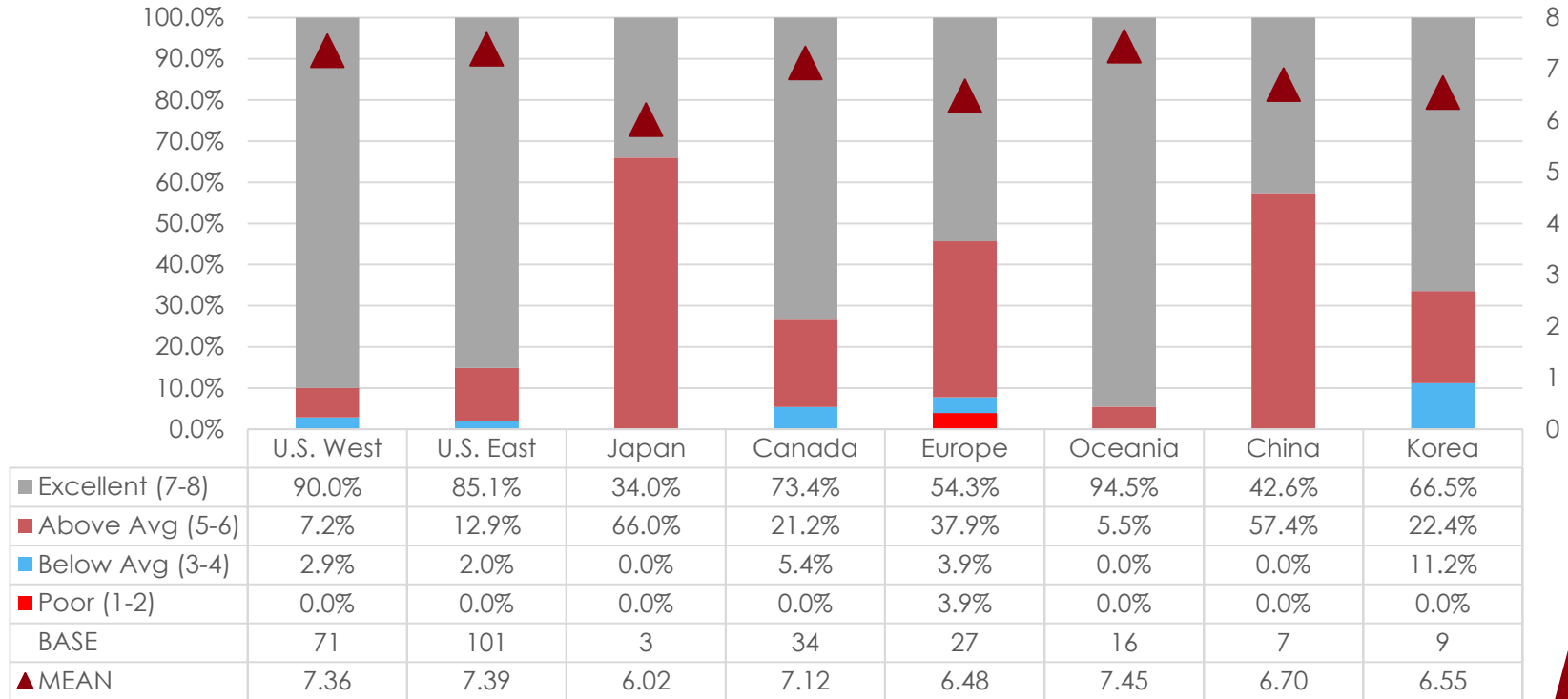
SATISFACTION – KAUA‘I BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Overall, visitors from U.S. East were the most satisfied with their visit to Kaua‘i.
- First-time visitors from U.S. West were more satisfied with their visit to Kaua‘i than repeat visitors.
- Among visitors to Kaua‘i from U.S. West MMA, less educated and less affluent travelers tended to be more satisfied with their trip.
- Among U.S. West visitors to Kaua‘i, we find that satisfaction is highest among younger segments of the sample.

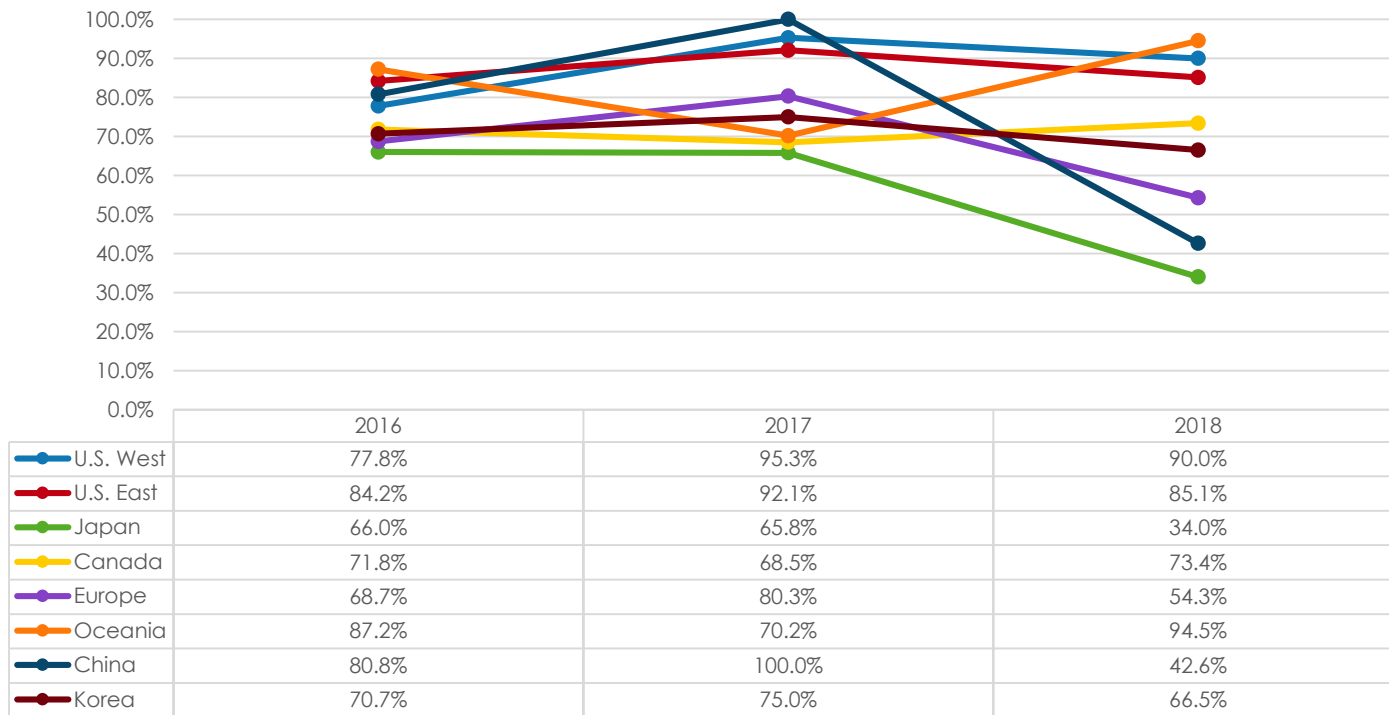
SATISFACTION – MOLOKA‘I BY MMA

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



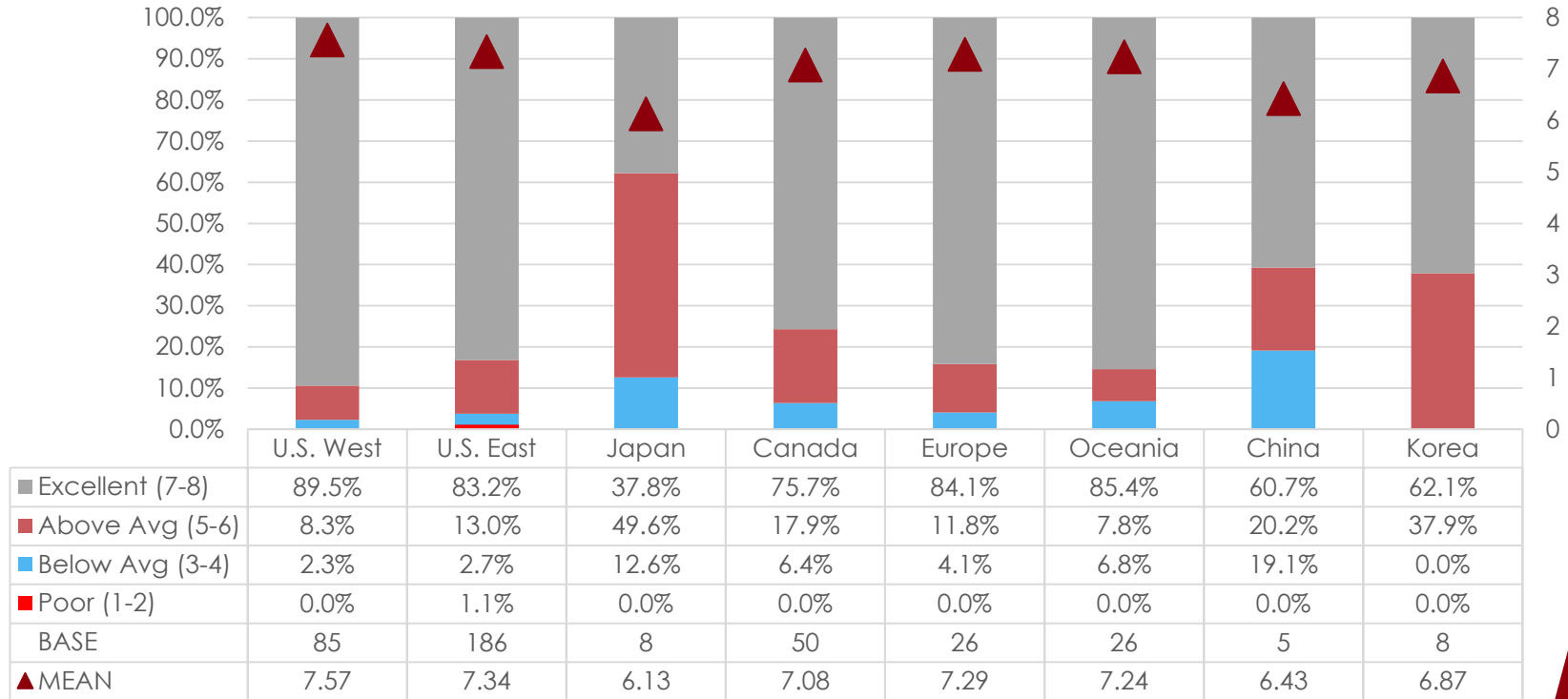
SATISFACTION – MOLOKA‘I BY MMA

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



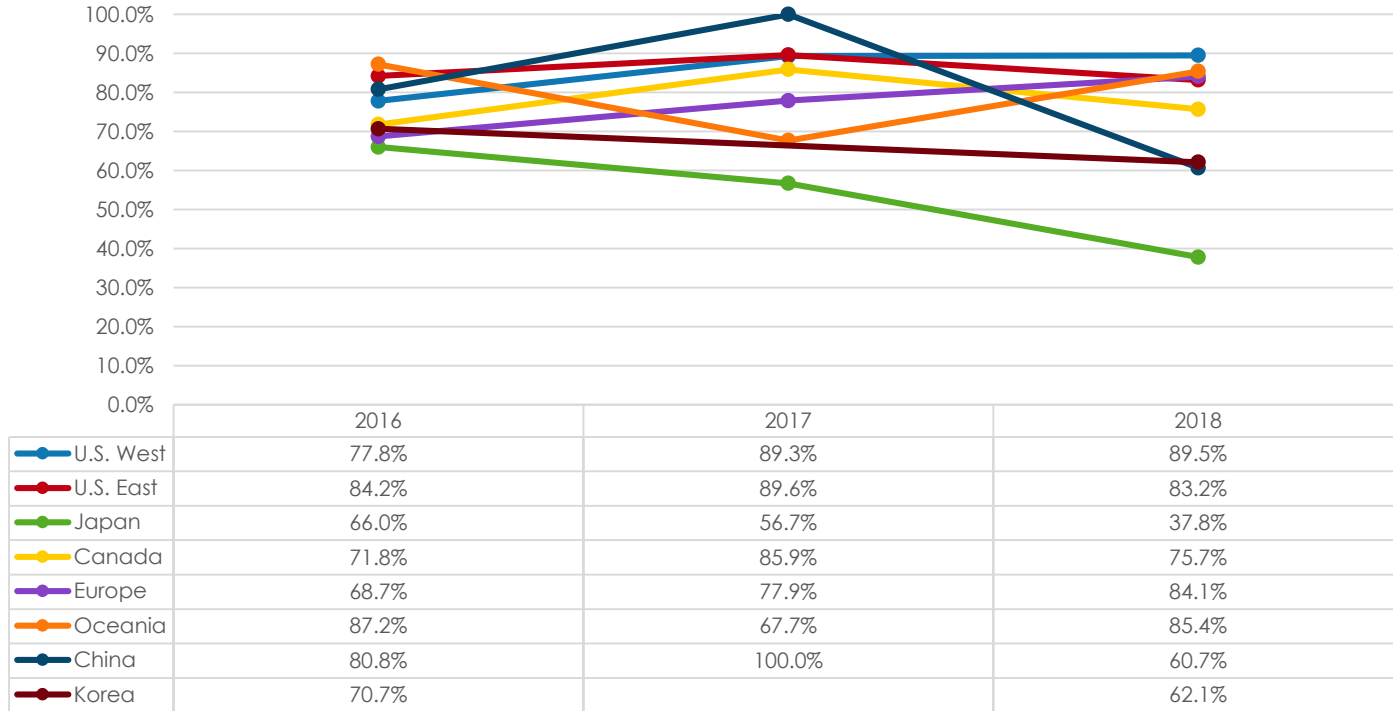
SATISFACTION – LANAI BY MMA

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



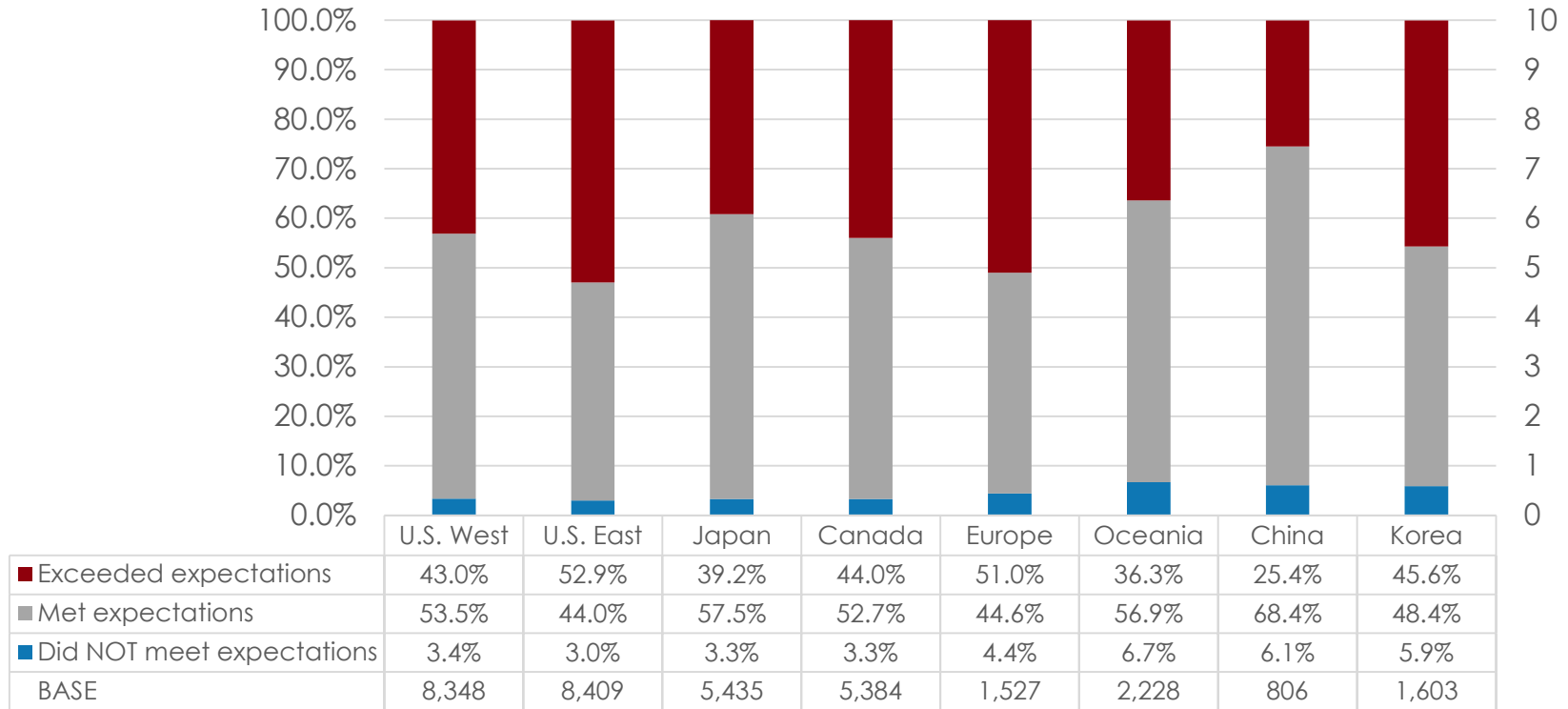
SATISFACTION – LANAI BY MMA

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



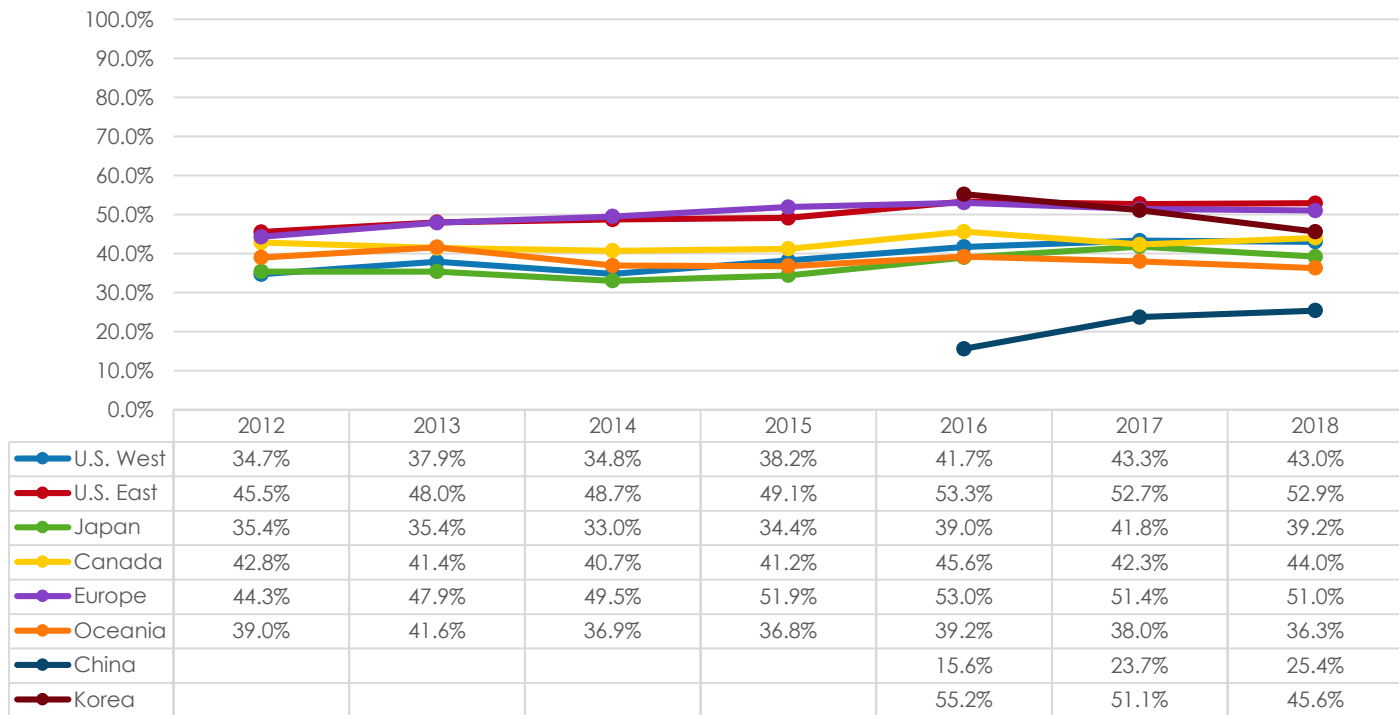
SECTION – TRIP EXPECTATIONS

HAWAI'I TRIP EXPECTATIONS



HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



HAWAI'I TRIP EXPECTATIONS

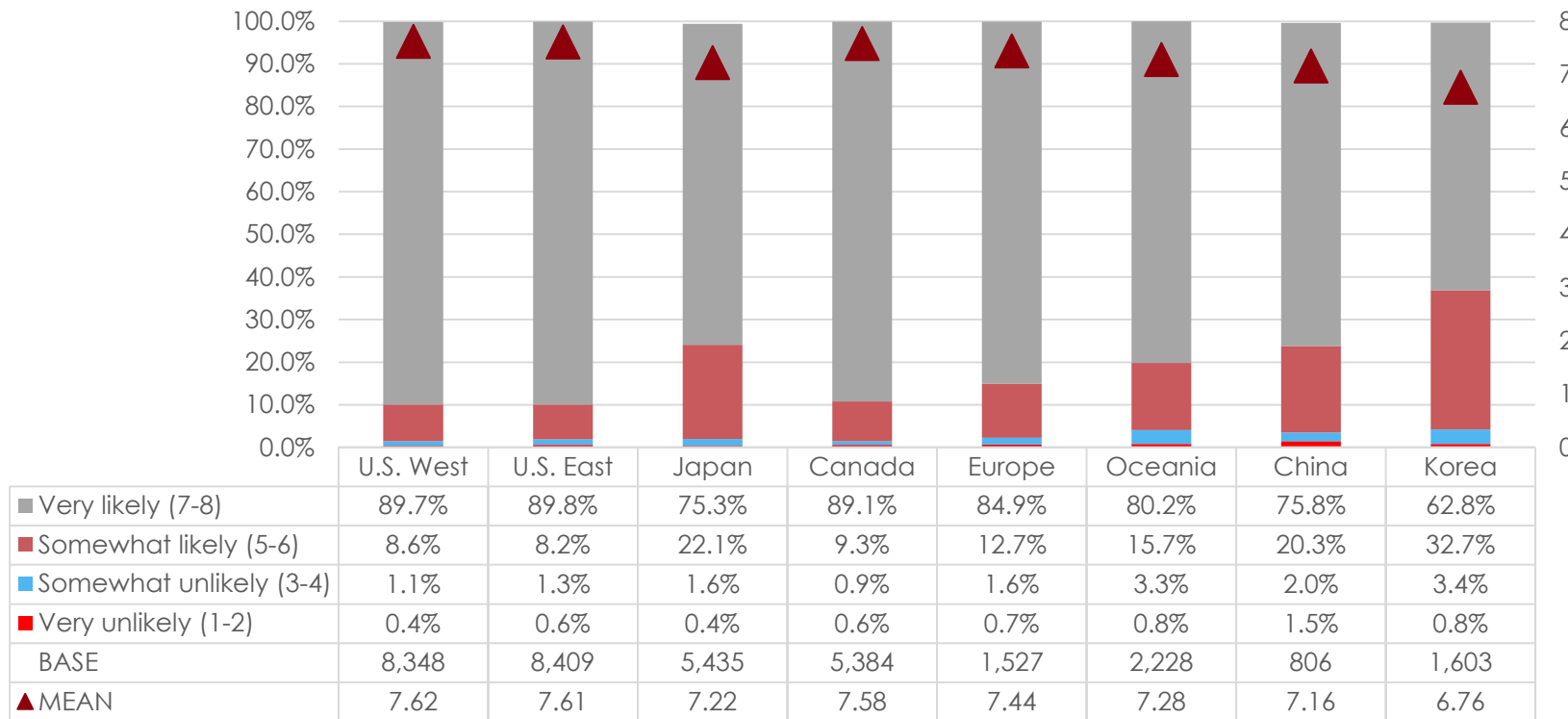
COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

- First-time visitors were more satisfied than repeat visitors in each of the markets.
- When segmented by gender, we find females more likely to agree that the trip exceeded their expectations in the following MMAs: U.S. West, U.S. East, Japan, Canada, Europe, and Oceania.
- Among U.S. visitors, less affluent travelers were more likely to admit that this trip exceeded their expectations.
- When the results are segmented by age, we find younger travelers from the all visitor markets were more likely to feel that this trip exceeded their expectations.

SECTION – BRAND/ DESTINATION ADVOCACY

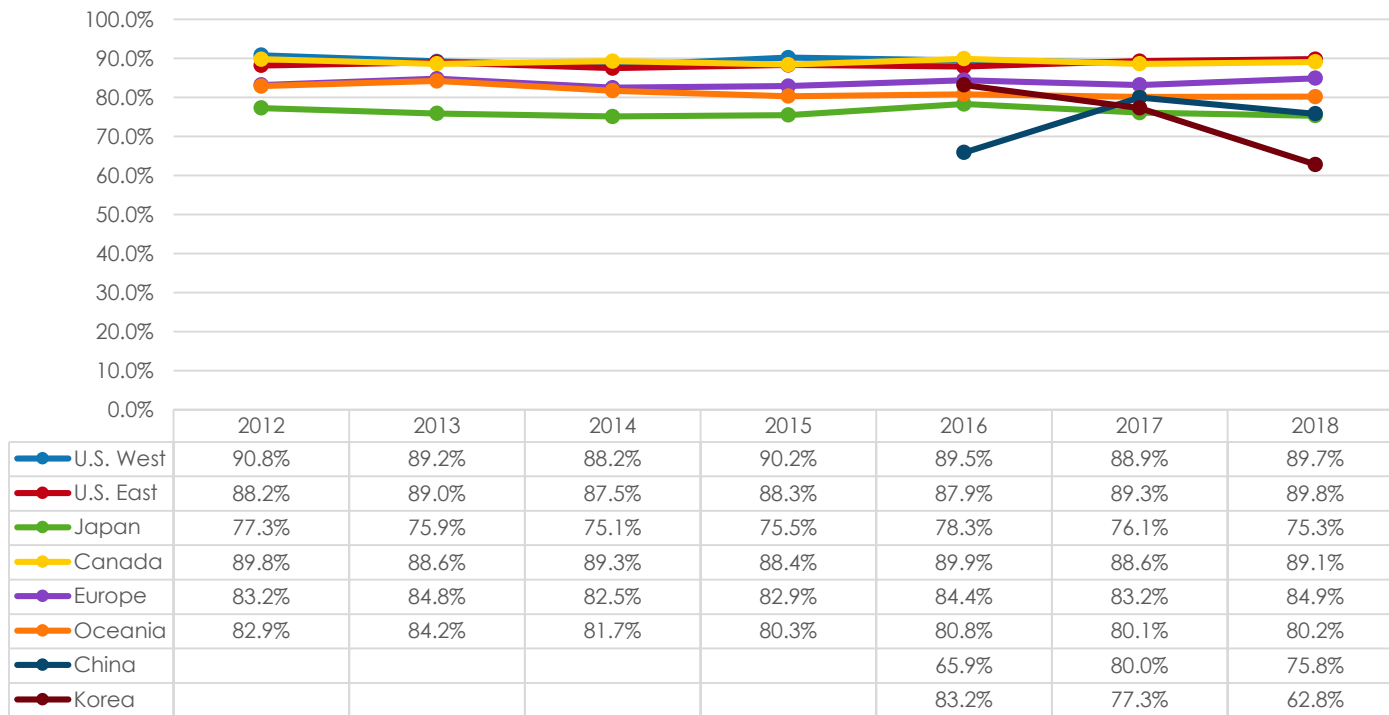
BRAND/DESTINATION – ADVOCACY

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



BRAND/DESTINATION – ADVOCACY

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



BRAND/DESTINATION – ADVOCACY

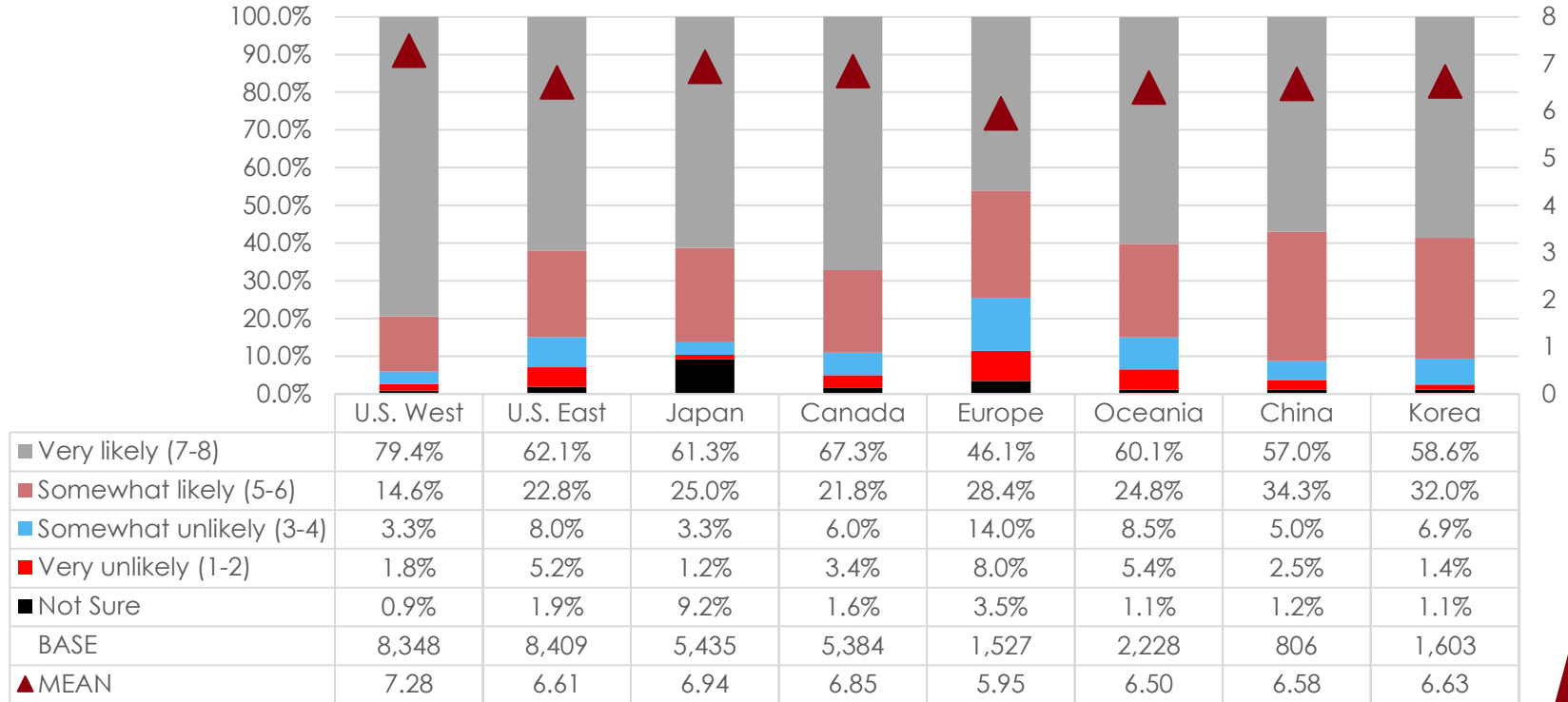
COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Japanese visitors who went to multiple islands during their stay were more likely to recommend Hawai'i than were those whose trip was limited to a single island.
- Females tended to be more likely to recommend Hawai'i to friends and family. This trend was particularly evident among visitors from the U.S. West, U.S. East, Japan, Canada, Europe and Oceania.
- Repeat visitors from the following MMAs appear to be stronger advocates than first-time visitors from these markets: U.S. West, U.S. East, Japan and Canada.

SECTION – BRAND/ DESTINATION LOYALTY

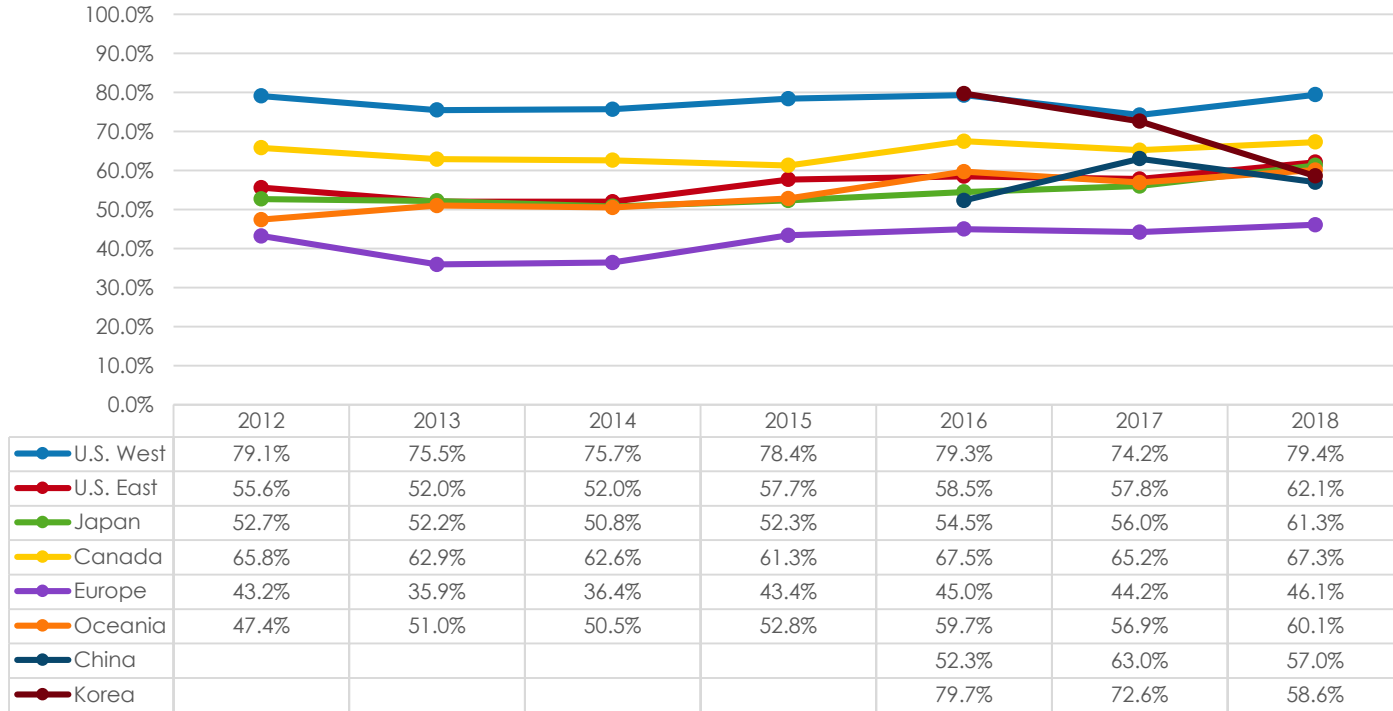
LIKELIHOOD OF RETURN VISIT

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



LIKELIHOOD OF RETURN VISIT

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



LIKELIHOOD OF RETURN VISIT

COMPARISON OF MEANS REVEAL THE FOLLOWING:

- Those who are traveling by themselves versus in larger groups were the most likely express a desire to return from the following Markets: U.S. West, U.S. East, Japan, and Europe.
- In the U.S. West and U.S. East markets, more affluent visitors (\$100K+ household incomes) were the most likely to express a desire to return to Hawai'i.
- Females from Japan were more likely to indicate a desire to return to Hawai'i than were their male counterparts.
- Females from U.S. West were also more likely to want to return to Hawai'i than were male visitors.
- Those who visited just a single island were more likely to express a desire to return than were visitors who visited multiple islands during their trip. This sentiment is especially true among the following markets: U.S. West, U.S. East, Canada, Europe, and Oceania.

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 51.5% Too expensive | 47.4% Too expensive |
| 45.0% Want to go someplace new | 36.4% Want to go someplace new |
| 29.1% Too crowded/ congested/ traffic | 23.7% Too crowded/ congested/ traffic |
| 25.3% Poor value | 22.7% Poor value |
| 22.8% Flight is too long | 18.8% Too commercialized/ overdeveloped |
| 17.5% Too commercialized/ overdeveloped | 16.1% Flight is too long |
| 16.2% Other financial obligations | 14.4% No reason to return/ nothing new |
| 14.0% Five years is too soon | 14.3% Five years is too soon |
| | 14.2% Other financial obligations |

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 58.8% Flight is too long | 50.5% Too expensive |
| 47.9% Too expensive | 42.1% Flight is too long |
| 45.2% Want to go someplace new | 41.6% Want to go someplace new |
| 19.7% Other financial obligations | 17.8% Five years is too soon |
| 19.3% Five years is too soon | 17.0% Other financial obligations |
| 14.0% Poor value | 15.3% Too crowded/ congested/ traffic |
| 11.4% Too crowded/ congested/ traffic | 15.2% Poor value |
| 10.2% Too commercialized/ overdeveloped | 12.3% Too commercialized/ overdeveloped |
| | 10.6% No compelling reason to return |

UNLIKELY TO RETURN – TOP REASONS JAPAN

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|-----------------------------------|-----------------------------------|
| 39.2% Want to go someplace new | 41.7% Too expensive |
| 38.1% Too expensive | 30.4% Want to go someplace new |
| 34.8% Five years is too soon | 25.9% Flight is too long |
| 25.9% Other financial obligations | 25.8% Other financial obligations |
| 22.3% Flight is too long | 24.2% Five years is too soon |

UNLIKELY TO RETURN – TOP REASONS CANADA

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 57.2% Too expensive | 51.5% Too expensive |
| 49.9% Want to go someplace new | 46.7% Want to go someplace new |
| 39.6% Flight is too long | 33.1% Flight is too long |
| 26.5% Poor value | 22.4% Five years is too soon |
| 21.1% Five years is too soon | 21.7% Poor value |
| 19.2% Other financial obligations | 14.7% Too crowded/ congested/ traffic |
| 14.6% Too commercialized/ overdeveloped | 13.6% Other financial obligations |
| 11.6% Too crowded/ congested/ traffic | 13.6% Too commercialized/ overdeveloped |
| | 10.2% No compelling reason to return |

UNLIKELY TO RETURN – TOP REASONS EUROPE

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 66.4% Flight is too long | 64.0% Flight is too long |
| 50.2% Too expensive | 49.0% Too expensive |
| 42.5% Want to go someplace new | 40.6% Want to go someplace new |
| 24.4% Five years is too soon | 21.8% Five years is too soon |
| 19.5% Poor value | 14.8% Too commercialized/ overdeveloped |
| 16.1% Other financial obligations | 13.5% Poor value |
| 15.5% Too commercialized/ overdeveloped | 13.3% Other financial obligations |

UNLIKELY TO RETURN – TOP REASONS OCEANIA

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 54.5% Want to go someplace new | 45.0% Want to go someplace new |
| 36.9% Too expensive | 42.6% Too expensive |
| 34.4% Too commercialized/ overdeveloped | 33.7% Poor value |
| 30.5% Poor value | 30.2% Too commercialized/ overdeveloped |
| 22.9% Too crowded/ congested/ traffic | 24.4% Too crowded/ congested/ traffic |
| 17.4% Other financial obligations | 19.3% No reason to return/ nothing new |
| 17.1% Flight is too long | 15.0% Flight is too long |
| 14.9% Five years is too soon | 14.4% Five years is too soon |
| | 10.9% Other financial obligations |

UNLIKELY TO RETURN – TOP REASONS CHINA

TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|-----------------------------------|---|
| 56.8% Want to go someplace new | 42.8% Flight is too long |
| 38.5% Flight is too long | 39.8% Too expensive |
| 32.4% Too expensive | 31.4% Want to go someplace new |
| 27.7% Poor value | 31.3% Five years is too soon |
| 27.1% Five years is too soon | 25.7% Poor value |
| 17.4% Other financial obligations | 23.1% No reason to return/ Nothing new |
| | 17.3% Too commercialized/ overdeveloped |

UNLIKELY TO RETURN – TOP REASONS KOREA

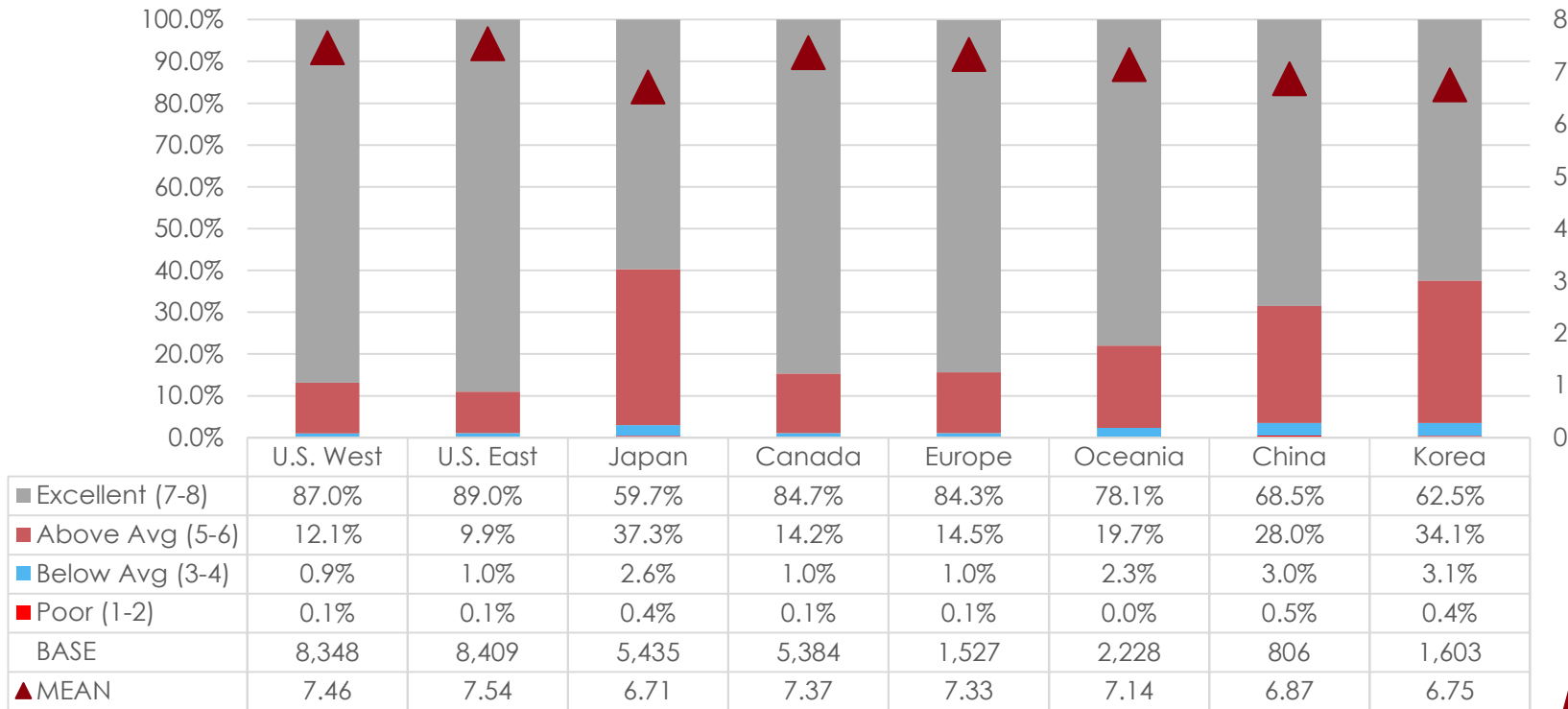
TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

| 2017 | 2018 |
|---|---|
| 60.1% Too expensive | 56.1% Too expensive |
| 56.2% Poor value | 35.2% Poor value |
| 49.0% Flight is too long | 31.7% Flight is too long |
| 29.0% Want to go someplace new | 28.3% No reason to return/ Nothing new |
| 27.2% Other financial obligations | 27.6% Want to go someplace new |
| 21.3% Five years is too soon | 27.0% Five years is too soon |
| 20.0% Too commercialized/ overdeveloped | 16.8% Other financial obligations |
| 14.2% Too crowded/ congested/ traffic | 12.2% Too commercialized/ overdeveloped |
| 12.6% Unfriendly people | 11.6% Unfriendly people |
| 12.5% Poor service | 11.4% Poor service |

SECTION –EXPERIENCES

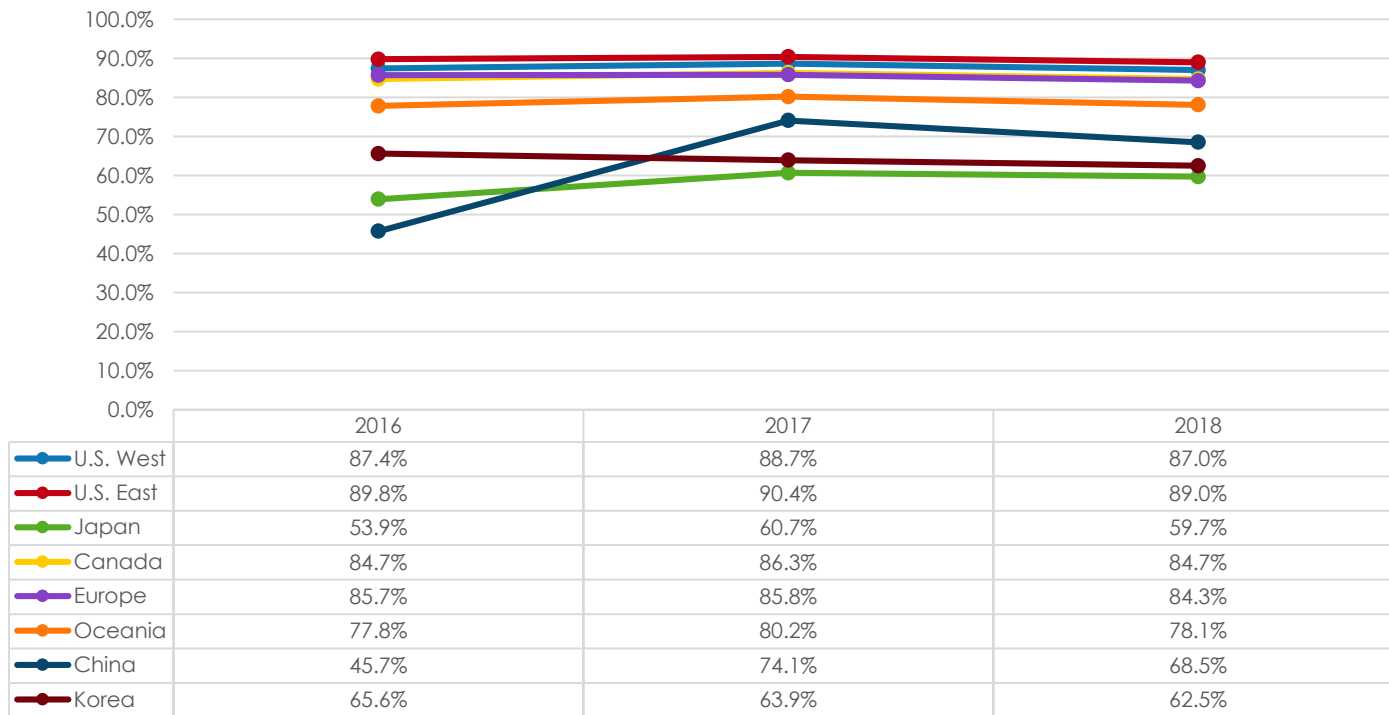
OFFERING A VARIETY OF EXPERIENCES

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



OFFERING A VARIETY OF EXPERIENCES

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



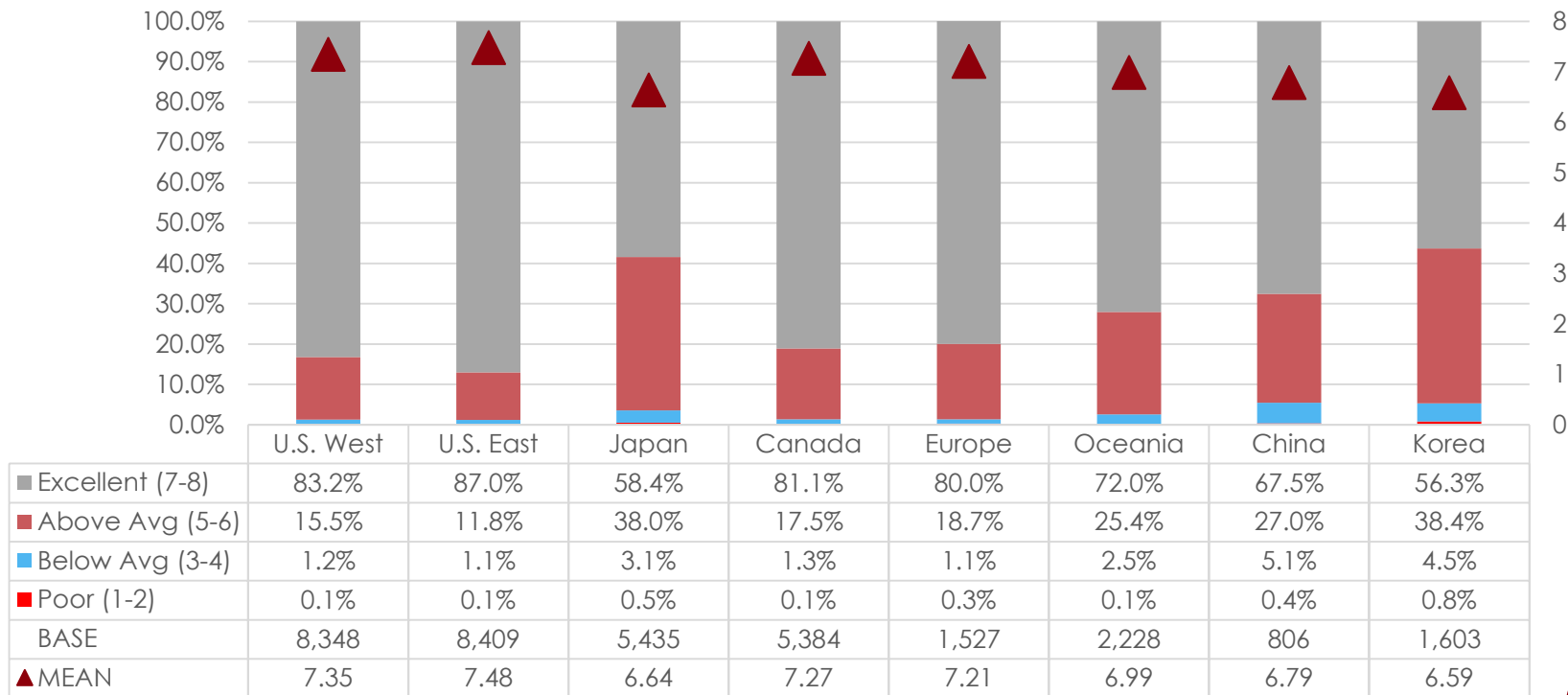
OFFERING A VARIETY OF EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Among Japanese visitors, satisfaction in this area declines with age with seniors being the least satisfied overall with the variety of experiences.
- Repeat visitors from Japan are particularly unimpressed with the variety of experiences during their trip.
- When the results are broken down by gender we find females more satisfied than males among the following markets: U.S. West, U.S. East, Canada, Europe, and Oceania.

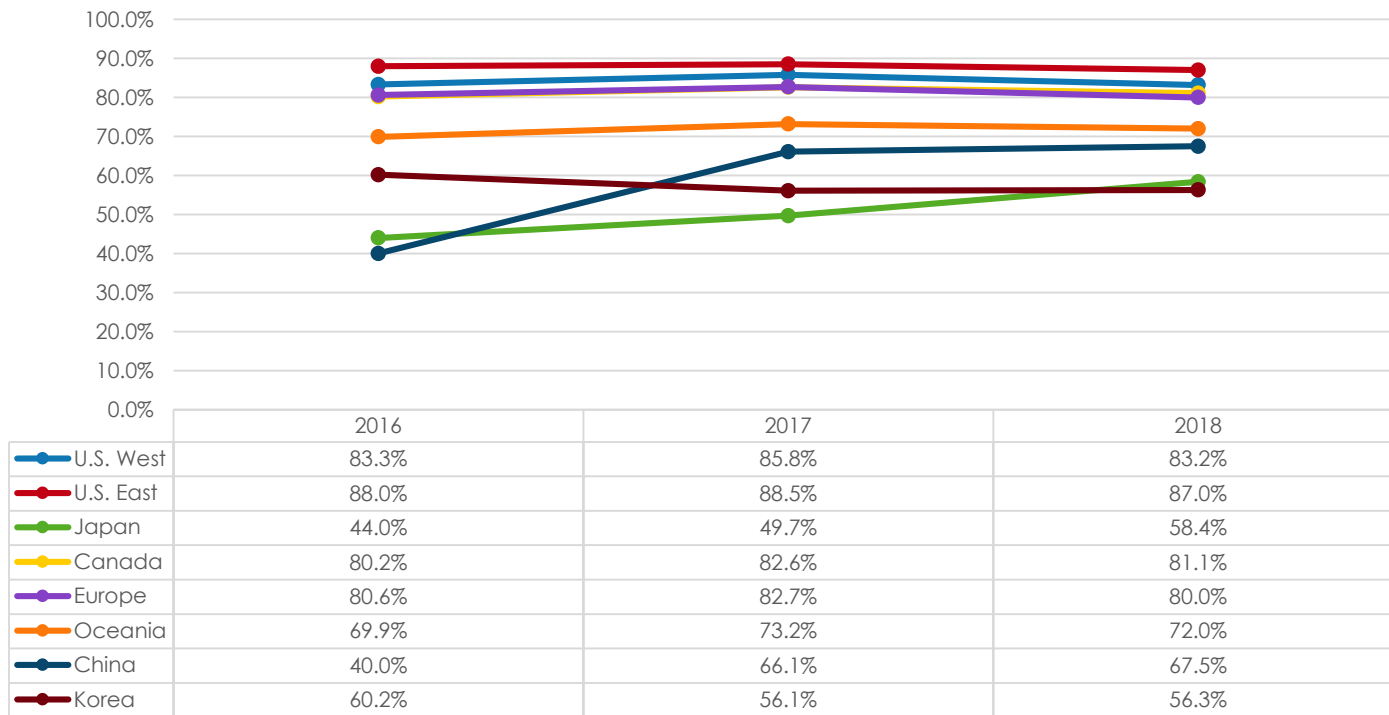
NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

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



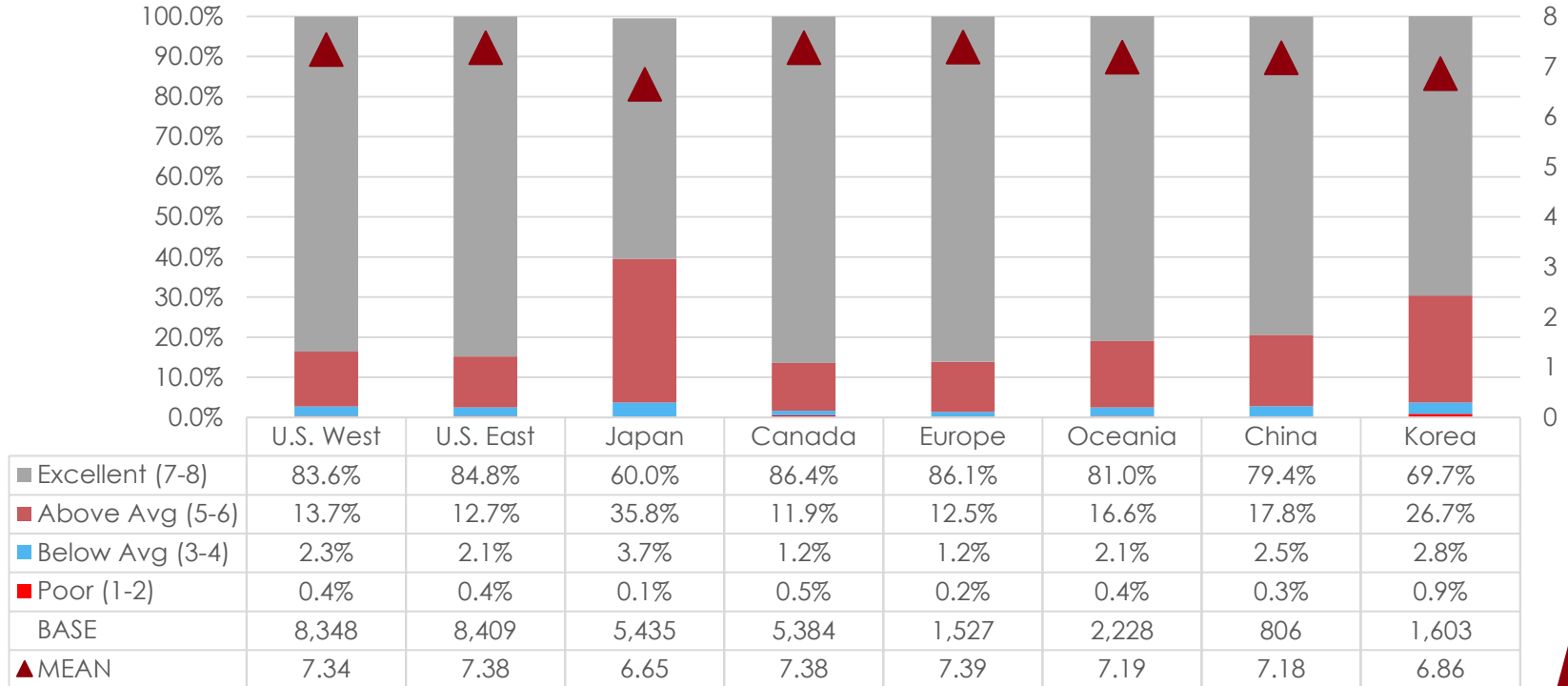
NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Respondents who visited multiple islands during the trip tended to be more satisfied in this area from the following markets: U.S. West, U.S. East, Japan, Canada, Oceania, and China.
- Female visitors from the following markets were more satisfied in terms of having different and unique experiences than were males: U.S. West, U.S. East, Canada, Oceania, and Korea.
- Satisfaction declines with age amongst visitors from Japan and Canada.

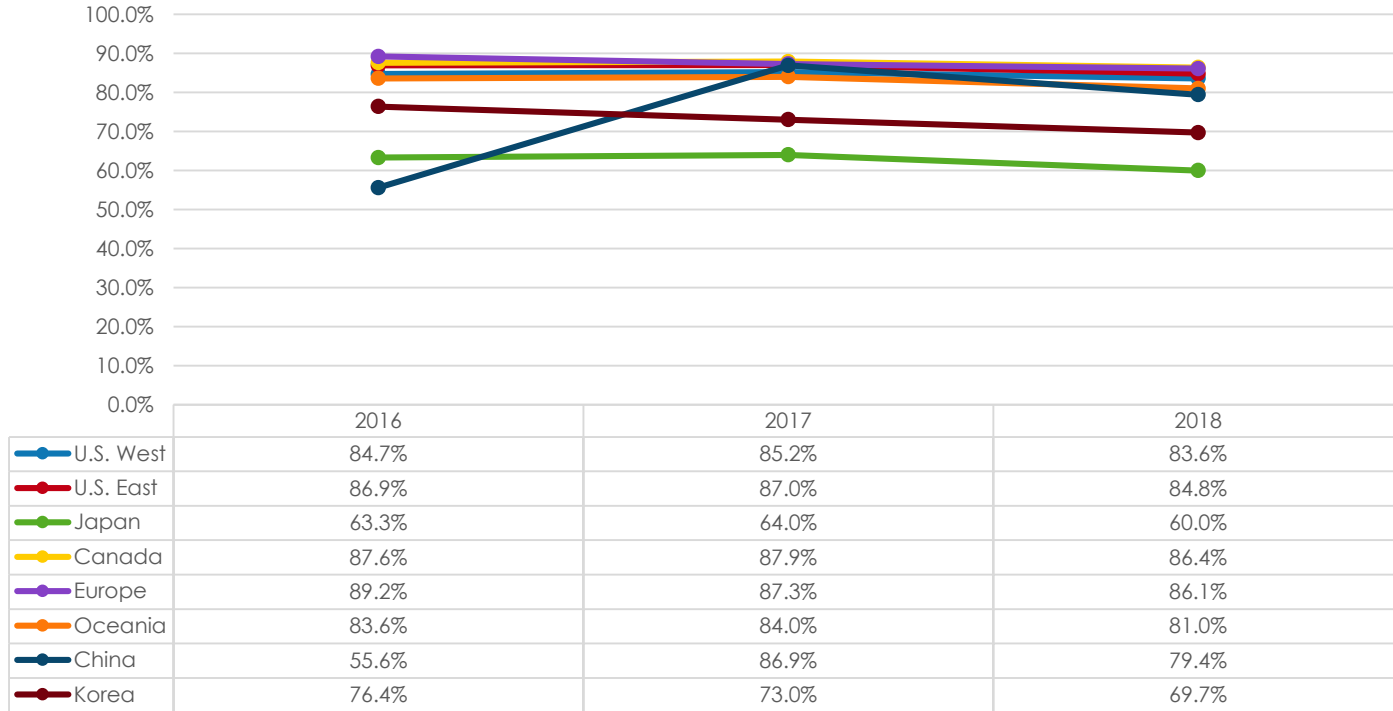
BEING A SAFE AND SECURE DESTINATION

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



BEING A SAFE AND SECURE DESTINATION

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



BEING A SAFE AND SECURE DESTINATION

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- In general, visitors from all markets who are traveling by themselves to Hawai'i feel less safe compared to those traveling with others.
- More educated Japanese visitors or those with a college degree felt safer on their trip than did Japanese visitors without a college degree.
- Among U.S. West visitors, more affluent respondents felt safer on their trip.
- Among Japanese respondents, younger visitors felt the least safe and satisfaction in this area rises in the older age group.

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 95.8% | 96.5% | 95.5% | 96.7% | 95.7% | 92.3% | 95.7% | 95.6% |
| On own (self-guided) | 85.1% | 81.8% | 68.8% | 85.5% | 72.3% | 48.7% | 59.6% | 76.9% |
| Helicopter/ airplane | 6.6% | 12.1% | 2.3% | 8.9% | 15.0% | 8.2% | 22.8% | 5.4% |
| Boat/ submarine/ whale | 25.9% | 31.1% | 9.7% | 25.2% | 26.6% | 18.7% | 27.6% | 16.2% |
| Visit towns | 56.3% | 57.0% | 31.2% | 59.5% | 46.3% | 31.4% | 31.3% | 35.3% |
| Limo/ van/ bus tour | 7.8% | 16.4% | 19.5% | 10.8% | 21.3% | 35.9% | 18.4% | 15.3% |
| Scenic views/ natural landmark | 61.4% | 69.9% | 23.3% | 68.0% | 64.4% | 51.7% | 56.3% | 53.3% |
| Movie/ TV/ film location | 4.1% | 7.0% | 4.1% | 5.0% | 7.8% | 9.6% | 29.6% | 12.8% |

ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.0% | 96.2% | 96.2% | 98.2% | 96.5% | 94.1% | 94.1% | 97.9% |
| Beach/ sunbathing | 85.5% | 83.8% | 73.1% | 90.6% | 86.3% | 78.4% | 75.1% | 78.5% |
| Bodyboard/ Standup paddle board | 17.0% | 11.3% | 3.7% | 17.1% | 12.5% | 9.6% | 4.0% | 6.7% |
| Surfing | 6.7% | 6.5% | 3.6% | 10.5% | 12.1% | 9.4% | 7.9% | 10.7% |
| Canoeing/ kayak | 8.7% | 7.6% | 2.1% | 7.0% | 7.9% | 4.0% | 3.8% | 4.7% |
| Swim- ocean | 68.3% | 65.1% | 38.4% | 76.5% | 69.5% | 64.1% | 39.2% | 49.0% |
| Snorkel | 49.9% | 42.9% | 17.2% | 54.0% | 43.8% | 27.7% | 21.0% | 45.4% |
| Windsurf/ Kitesurf | 0.2% | 0.3% | 0.2% | 0.5% | 1.1% | 0.2% | 1.9% | 1.3% |
| Jet ski/ Parasail | 2.3% | 1.8% | 2.9% | 1.2% | 0.7% | 1.4% | 1.1% | 5.7% |
| Scuba | 3.1% | 3.2% | 2.2% | 3.6% | 3.8% | 1.1% | 3.6% | 3.9% |
| Fishing | 3.4% | 3.1% | 1.5% | 2.4% | 1.3% | 1.1% | 4.9% | 1.6% |
| Golf | 7.4% | 6.7% | 7.5% | 8.0% | 2.4% | 3.1% | 5.7% | 3.6% |

ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.0% | 96.2% | 96.2% | 98.2% | 96.5% | 94.1% | 94.1% | 97.9% |
| Run/ Jog/ Fitness walk | 30.8% | 28.5% | 14.7% | 33.1% | 19.1% | 22.8% | 20.6% | 8.7% |
| Spa | 10.1% | 9.9% | 6.5% | 6.7% | 5.6% | 7.7% | 5.5% | 6.0% |
| Hiking/Backpack/Camp | 32.4% | 36.0% | 7.4% | 35.5% | 26.9% | 10.8% | 13.7% | 13.5% |
| Agritourism | 13.6% | 17.1% | 12.2% | 12.5% | 10.5% | 8.1% | 17.3% | 19.3% |
| Sport event/ tournament | 2.8% | 2.2% | 1.8% | 3.6% | 2.4% | 2.0% | 1.7% | 2.1% |
| Park/ botanical garden | 38.2% | 45.3% | 24.0% | 43.4% | 40.9% | 32.9% | 41.1% | 25.3% |
| Waterpark | 1.5% | 1.2% | 3.5% | 1.6% | 3.1% | 2.0% | 13.1% | 3.9% |
| Mountain tube/ waterfall rappel | 2.0% | 1.7% | 0.7% | 1.5% | 3.8% | 0.9% | 1.5% | 1.4% |
| Zip-lining | 6.0% | 5.9% | 0.7% | 3.6% | 3.0% | 2.4% | 1.9% | 1.6% |
| Skydiving | 0.4% | 0.5% | 0.8% | 0.4% | 0.8% | 0.1% | 10.9% | 3.5% |
| All terrain vehicle (ATV) | 2.9% | 3.8% | 1.1% | 2.3% | 3.3% | 3.3% | 7.3% | 6.6% |
| Horseback riding | 2.3% | 2.3% | 5.0% | 1.9% | 1.7% | 1.6% | 11.1% | 3.4% |

ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 98.4% | 97.7% | 98.3% | 98.6% | 97.1% | 98.2% | 96.1% | 98.8% |
| Lunch/ sunset/ dinner/ evening cruise | 23.0% | 26.1% | 15.7% | 21.9% | 29.9% | 21.0% | 60.7% | 37.0% |
| Live music/ stage show | 32.2% | 37.3% | 20.3% | 33.3% | 30.7% | 25.3% | 16.2% | 15.1% |
| Nightclub/ dancing/ bar/ karaoke | 9.4% | 10.0% | 6.6% | 8.6% | 8.1% | 9.4% | 9.7% | 9.0% |
| Fine dining | 53.6% | 55.7% | 45.4% | 48.1% | 40.6% | 38.3% | 47.6% | 55.2% |
| Family restaurant | 62.8% | 58.3% | 23.4% | 63.4% | 48.8% | 67.7% | 19.1% | 37.6% |
| Fast food | 36.5% | 35.7% | 53.0% | 47.1% | 46.4% | 49.9% | 43.5% | 50.2% |
| Food truck | 30.7% | 31.2% | 14.6% | 35.2% | 25.9% | 23.9% | 18.4% | 47.5% |
| Café/ coffee house | 46.6% | 43.9% | 53.8% | 52.4% | 53.0% | 58.8% | 37.3% | 54.4% |
| Ethnic dining | 31.9% | 34.0% | 10.3% | 26.7% | 18.6% | 14.5% | 18.5% | 24.6% |
| Prepared own meal | 55.1% | 43.6% | 18.7% | 68.2% | 37.6% | 25.2% | 18.0% | 11.3% |

ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.7% | 95.9% | 97.6% | 97.4% | 95.6% | 96.9% | 93.9% | 97.1% |
| Mall/ department store | 42.4% | 43.1% | 79.9% | 59.1% | 58.6% | 78.0% | 66.5% | 77.2% |
| Designer boutique | 17.5% | 18.6% | 25.1% | 19.9% | 17.7% | 23.8% | 9.0% | 4.6% |
| Hotel/ resort store | 33.5% | 39.2% | 35.4% | 27.4% | 30.7% | 35.2% | 24.7% | 30.2% |
| Swap meet/ flea market | 17.4% | 15.6% | 3.6% | 17.4% | 6.7% | 9.2% | 4.4% | 3.6% |
| Discount/ outlet store | 17.3% | 17.8% | 23.7% | 22.5% | 20.0% | 49.4% | 40.7% | 61.6% |
| Supermarket | 68.2% | 59.2% | 65.7% | 73.9% | 70.2% | 54.0% | 62.2% | 57.1% |
| Farmer's market | 37.2% | 31.2% | 18.1% | 44.7% | 28.9% | 17.0% | 13.1% | 10.3% |
| Convenience store | 46.5% | 48.1% | 45.6% | 52.7% | 36.0% | 65.1% | 42.2% | 43.3% |
| Duty free store | 3.7% | 4.6% | 42.1% | 7.4% | 6.9% | 12.5% | 50.7% | 45.8% |
| Local shop/ artisan | 65.7% | 67.0% | 10.7% | 66.7% | 59.1% | 51.3% | 24.8% | 14.7% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 71.8% | 77.1% | 55.5% | 72.9% | 74.8% | 74.6% | 80.9% | 66.4% |
| Historic military site | 18.6% | 28.3% | 18.1% | 16.8% | 33.2% | 45.5% | 51.9% | 18.9% |
| Other historical site | 29.2% | 31.4% | 18.1% | 29.4% | 29.5% | 21.7% | 28.6% | 28.6% |
| Museum/ art gallery | 19.2% | 18.3% | 6.4% | 19.8% | 15.5% | 14.5% | 15.9% | 7.3% |
| Luau/ Polynesian show/ hula show | 32.0% | 42.0% | 12.9% | 34.4% | 34.2% | 31.5% | 13.2% | 21.9% |
| Lesson- ex. ukulele, hula, canoe, lei making | 7.1% | 8.5% | 6.4% | 8.2% | 8.1% | 6.6% | 10.7% | 5.2% |
| Play/ concert/ theatre | 4.7% | 5.1% | 3.1% | 5.5% | 5.5% | 4.4% | 3.8% | 4.7% |
| Art/ craft fair | 15.0% | 13.5% | 3.4% | 14.5% | 9.0% | 5.6% | 11.7% | 5.9% |
| Festival event | 5.3% | 5.3% | 3.1% | 6.0% | 4.7% | 4.1% | 1.8% | 2.7% |

ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 92.8% | 92.4% | 95.9% | 96.0% | 94.4% | 96.9% | 92.7% | 95.5% |
| Airport shuttle | 18.4% | 20.2% | 24.0% | 22.2% | 26.8% | 53.1% | 19.5% | 15.9% |
| Trolley | 2.3% | 3.4% | 46.2% | 4.5% | 7.2% | 22.6% | 8.0% | 21.8% |
| Public bus | 4.4% | 5.7% | 16.9% | 11.1% | 18.7% | 30.1% | 18.8% | 12.2% |
| Tour bus/ tour van | 8.9% | 18.0% | 27.0% | 12.4% | 20.3% | 37.0% | 24.6% | 30.7% |
| Taxi/ limo | 7.6% | 12.4% | 31.7% | 15.3% | 25.9% | 39.0% | 24.6% | 20.7% |
| Rental car | 80.0% | 74.2% | 33.1% | 81.1% | 62.4% | 31.0% | 51.9% | 62.0% |
| Ride share | 12.1% | 14.9% | 3.2% | 9.1% | 11.9% | 20.6% | 14.7% | 7.4% |
| Bicycle rental | 2.7% | 2.2% | 2.9% | 3.4% | 3.3% | 1.7% | 3.2% | 1.3% |

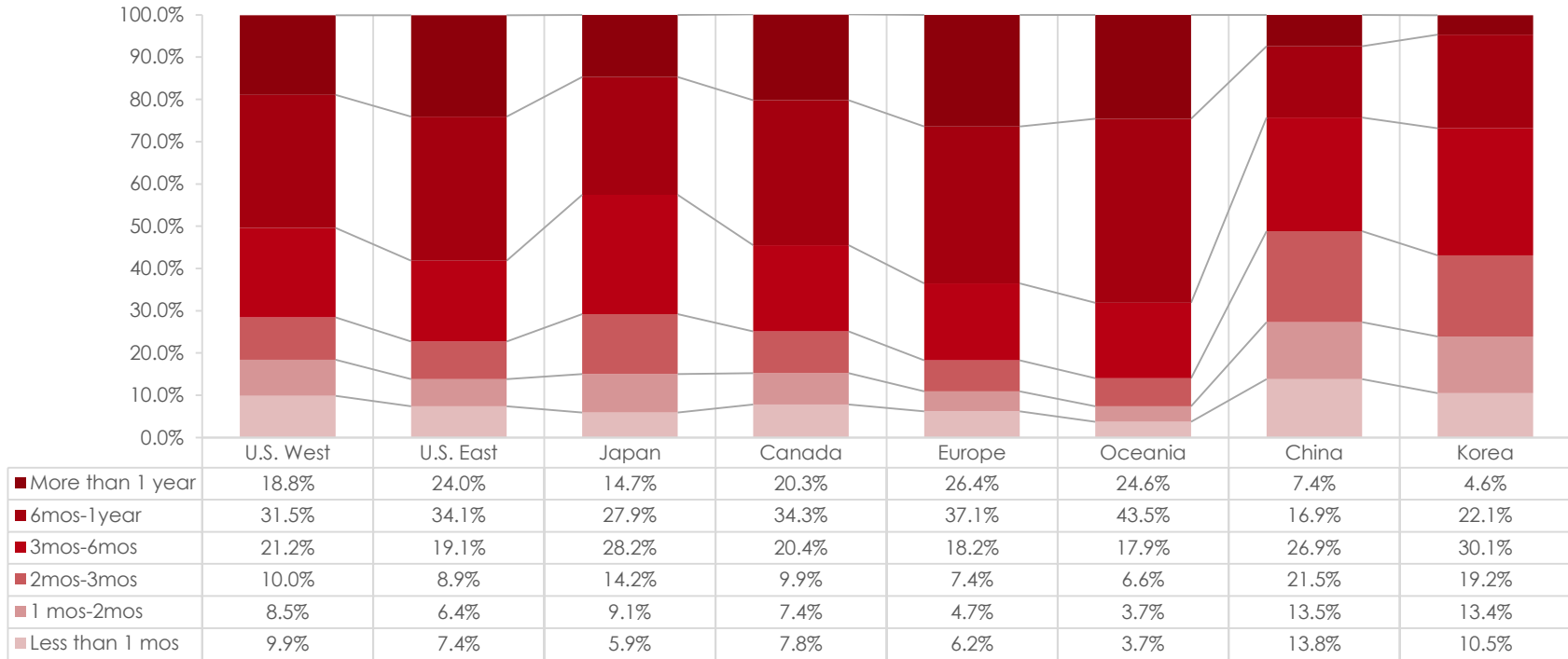
ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 31.3% | 26.4% | 12.6% | 20.1% | 15.5% | 9.1% | 19.6% | 16.2% |
| Visit friends/ family | 30.5% | 25.6% | 11.9% | 19.0% | 13.4% | 8.4% | 17.7% | 14.6% |
| Volunteer- non-profit | 1.5% | 1.3% | .9% | 1.3% | 2.3% | .9% | 2.5% | 1.8% |

SECTION – TRAVEL PLANNING

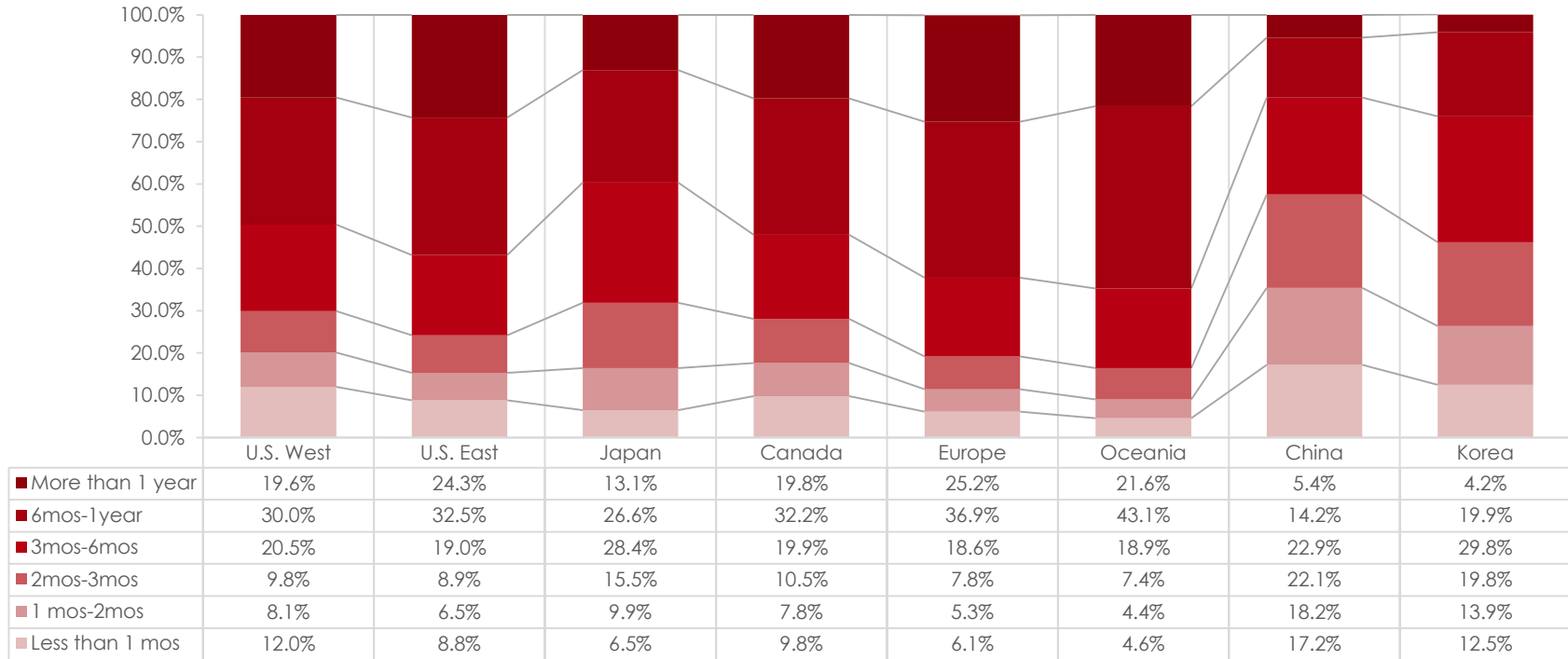
TRAVEL PLANNING

Decision to take vacation/ pleasure trip



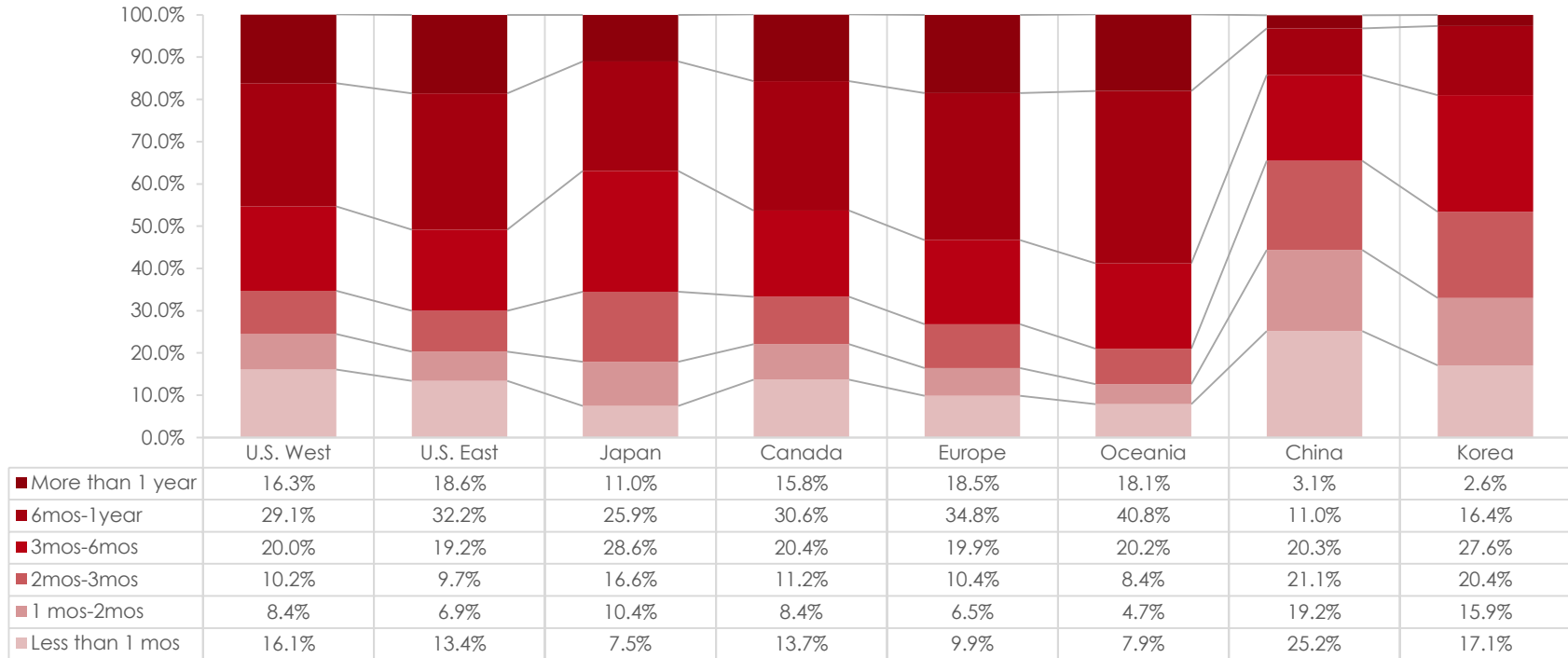
TRAVEL PLANNING

Decision to visit HAWAII



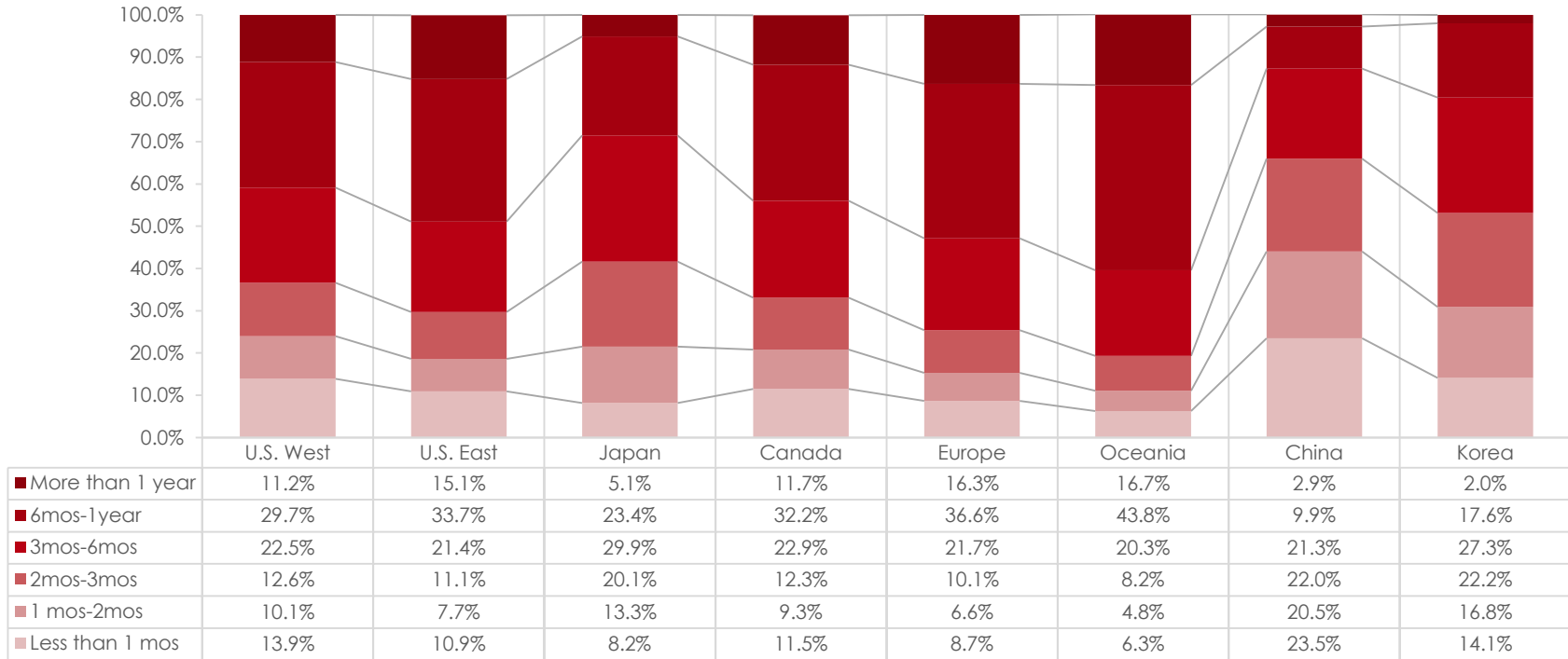
TRAVEL PLANNING

Decision on which island to visit



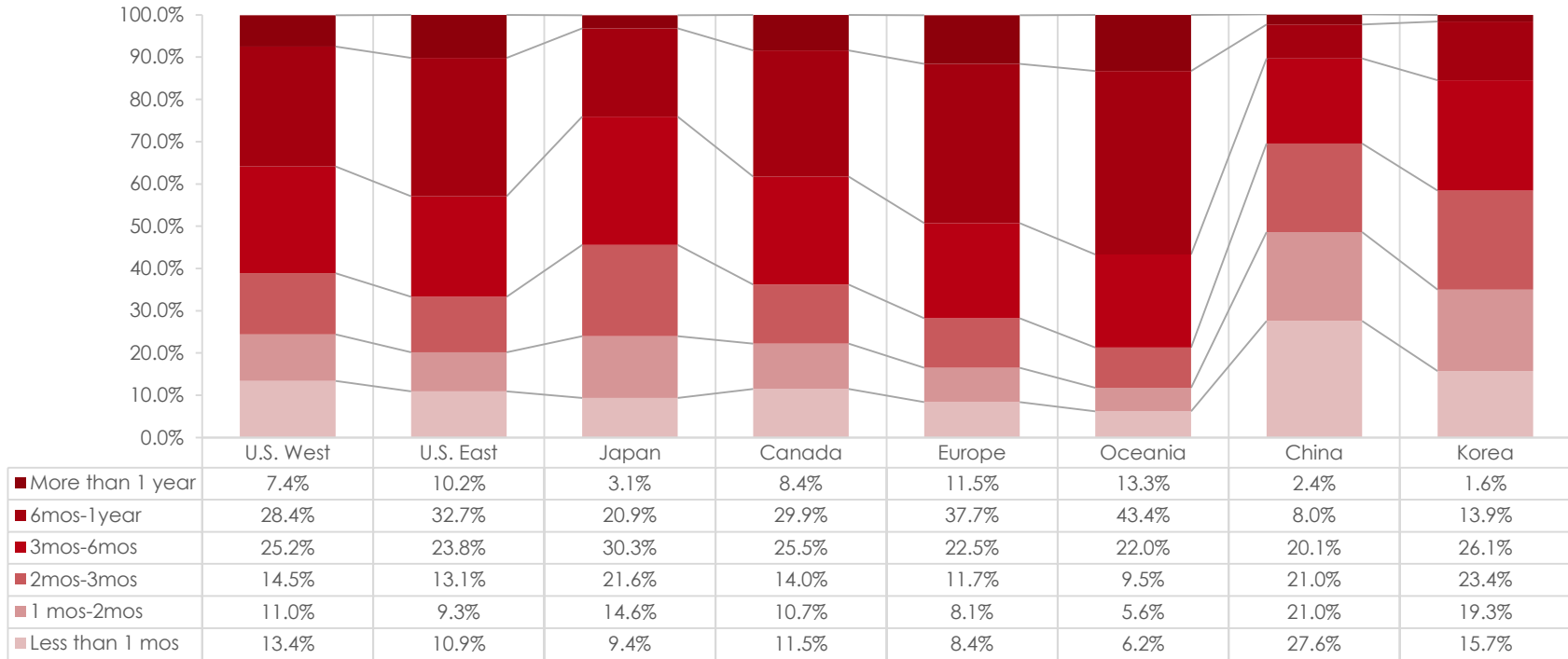
TRAVEL PLANNING

Determining the dates of your trip



TRAVEL PLANNING

Begin booking your trip



TRAVEL PLANNING SEGMENTATION

- Visitors from Asia have shorter travel planning and decision-making timeframes in general.
- Those who traveled here in smaller parties of one or two individuals tended to have shorter travel planning and decision-making windows prior to arrival.
- Older visitors from U.S. West, U.S. East, Canada, and Japan were more likely to have chosen Hawai'i as a destination at least six month prior to arrival. Younger segments from these MMAs appear to have shorter planning windows.

TRAVEL PLANNING- SOURCES OF INFORMATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Personal experience | 42.0% | 32.1% | 21.5% | 37.9% | 19.6% | 25.5% | 21.1% | 10.7% |
| Recommendations from friends/ relatives | 31.4% | 35.6% | 15.4% | 34.3% | 27.5% | 28.3% | 22.0% | 15.9% |
| Online travel booking sites | 28.3% | 27.8% | 12.7% | 37.8% | 29.5% | 25.6% | 33.0% | 15.5% |
| Travel agents/ Packaged tour companies | 13.1% | 20.2% | 53.9% | 14.7% | 39.3% | 56.5% | 47.4% | 46.0% |
| Travel information websites | 18.6% | 23.5% | 13.1% | 26.6% | 28.9% | 23.7% | 25.1% | 10.6% |
| Mobile apps | 19.0% | 19.4% | 8.7% | 16.1% | 17.9% | 13.5% | 21.7% | 18.4% |
| Guide books | 13.3% | 18.3% | 24.4% | 18.7% | 28.0% | 8.0% | 16.0% | 12.0% |
| Travel blogs | 11.1% | 15.5% | 20.2% | 20.0% | 22.6% | 13.6% | 15.5% | 38.5% |
| GoHawaii.com | 12.3% | 18.0% | 6.8% | 21.5% | 25.7% | 15.9% | 11.2% | 1.7% |
| Information from Airlines | 13.6% | 12.9% | 9.4% | 10.4% | 9.6% | 7.7% | 7.4% | 3.4% |
| Social media | 9.1% | 11.4% | 16.0% | 13.5% | 14.6% | 12.0% | 13.6% | 19.9% |
| Information from Hotels/resort front desk/concierge/tour desk) | 11.4% | 15.6% | 7.3% | 9.9% | 9.8% | 9.4% | 7.3% | 3.7% |

TRAVEL PLANNING- SOURCES OF INFORMATION

- Visitors from Japan, Oceania, China, and Korea were more reliant on travel agents and companies that specialize in packaged tours than were visitors from the other markets.
- Japanese and European visitors were the most reliant on guide books.
- Word-of-mouth recommendations from friends and relatives were more likely to be mentioned by visitors from the U.S. Mainland and Canada.
- Japanese visitors were the least reliant on mobile apps as an informational source for this most recent trip.
- Japanese and Korean visitors were also the least likely to have visited GoHawaii.com prior to arrival.

SECTION – TRIP PURPOSE

PRIMARY PURPOSE OF TRIP

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Vacation | 59.5% | 55.8% | 65.4% | 74.3% | 66.6% | 73.8% | 71.2% | 52.7% |
| Anniversary/ birthday | 7.8% | 9.0% | 3.6% | 5.7% | 5.7% | 5.7% | 2.0% | 3.8% |
| Visit friends/ relatives | 8.2% | 9.3% | 1.2% | 3.1% | 4.2% | 2.2% | 3.2% | 0.7% |
| Honeymoon | 2.0% | 3.8% | 10.2% | 2.3% | 8.3% | 2.4% | 3.7% | 28.9% |
| Business trip | 3.9% | 4.7% | 2.4% | 0.9% | 1.7% | 0.5% | 3.8% | 1.5% |
| Wedding/ vow renewal | 3.2% | 2.8% | 4.5% | 2.8% | 1.6% | 1.1% | 1.6% | 0.6% |
| Convention, conference, seminar | 2.6% | 4.1% | 0.9% | 1.8% | 3.4% | 0.4% | 2.9% | 2.0% |
| Vacation home/ timeshare | 3.0% | 2.2% | 1.9% | 2.1% | 0.4% | 0.2% | 0.6% | 0.1% |
| Family gathering/ reunion | 2.5% | 1.6% | 0.9% | 2.1% | 1.2% | 1.2% | 1.7% | 1.1% |
| Sporting event | 1.5% | 0.9% | 1.1% | 1.3% | 1.3% | 0.5% | 0.2% | 0.1% |

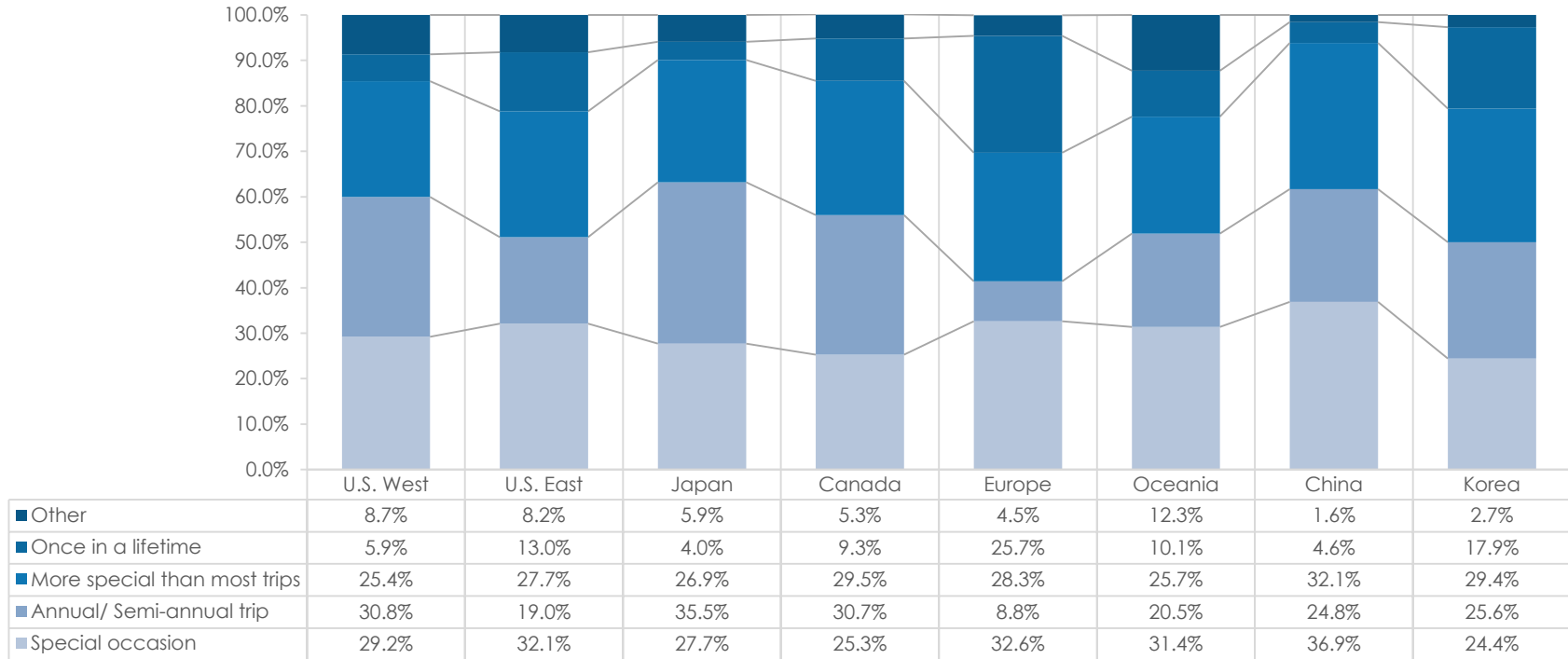
SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Vacation | 82.8% | 82.6% | 86.0% | 91.4% | 86.5% | 89.8% | 89.0% | 80.0% |
| Anniversary/ birthday | 14.1% | 16.0% | 7.2% | 12.1% | 12.4% | 12.1% | 3.7% | 11.2% |
| Visit friends/ relatives | 16.6% | 16.1% | 4.7% | 8.4% | 8.7% | 4.2% | 6.4% | 2.7% |
| Shopping/ fashion | 1.1% | 0.7% | 26.3% | 1.5% | 2.0% | 9.2% | 16.8% | 13.9% |
| Family gathering/ reunion | 7.1% | 5.2% | 4.4% | 5.4% | 3.5% | 3.0% | 5.1% | 2.7% |
| Honeymoon | 2.7% | 4.5% | 12.9% | 2.9% | 9.8% | 2.9% | 5.1% | 31.6% |
| Vacation home/ timeshare | 6.7% | 4.8% | 4.8% | 5.1% | 0.9% | 1.2% | 2.6% | 0.2% |
| Business trip | 5.5% | 6.1% | 3.3% | 1.5% | 2.2% | 0.7% | 5.1% | 2.7% |

SECONDARY PURPOSE OF TRIP - SEGMENTATION

- Visitors from Asia, Japanese in particular more so than other MMAs were the most likely to list shopping as a reason for visiting. A third of the Japanese females without a college degree listed shopping and fashion as one of the reasons for visiting.
- A third of the Korean visitors who took part in the study were here on their honeymoon.
- One in five visitors from Oceania indicated that Hawai'i was a layover stop on their way home or to another destination.
- Repeat visitors were more likely to indicate they were here to visit friends as a reason for their trip, more so than first-time visitors.

VACATION TRIP DESCRIPTION

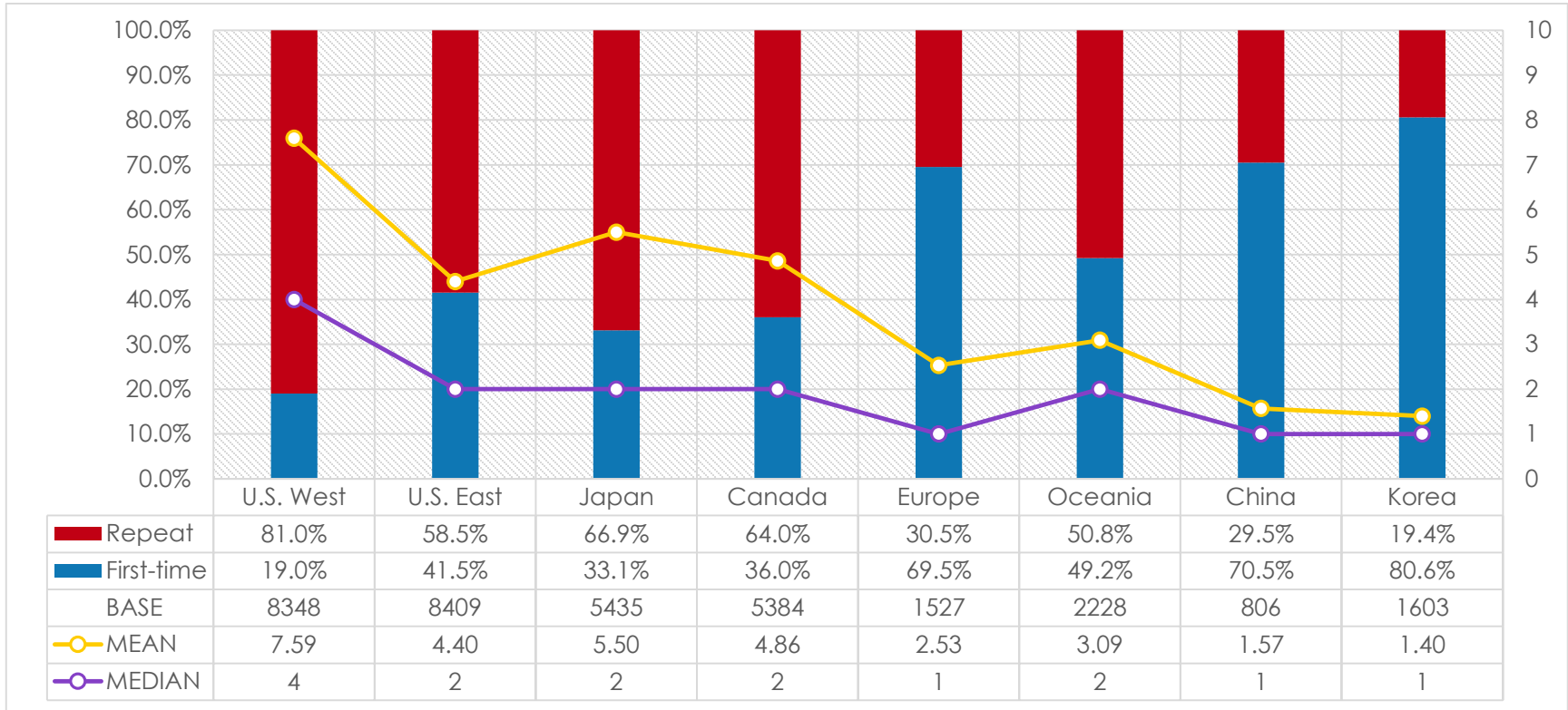


VACATION TRIP DESCRIPTION - SEGMENTATION

- One in four European visitors described their trip as a once in a lifetime experience.
- Visitors from Japan, U.S. West, and Canada were the most likely to describe their trip as an annual or semi-annual occurrence.
- Visitors from the U.S. who hail from more affluent households were also more likely to describe their trip as a fairly regularly occurrence.

SECTION – TRIPS TO HAWAI'I

1ST TIME VS REPEAT VISITOR



1ST TIME VS REPEAT VISITOR

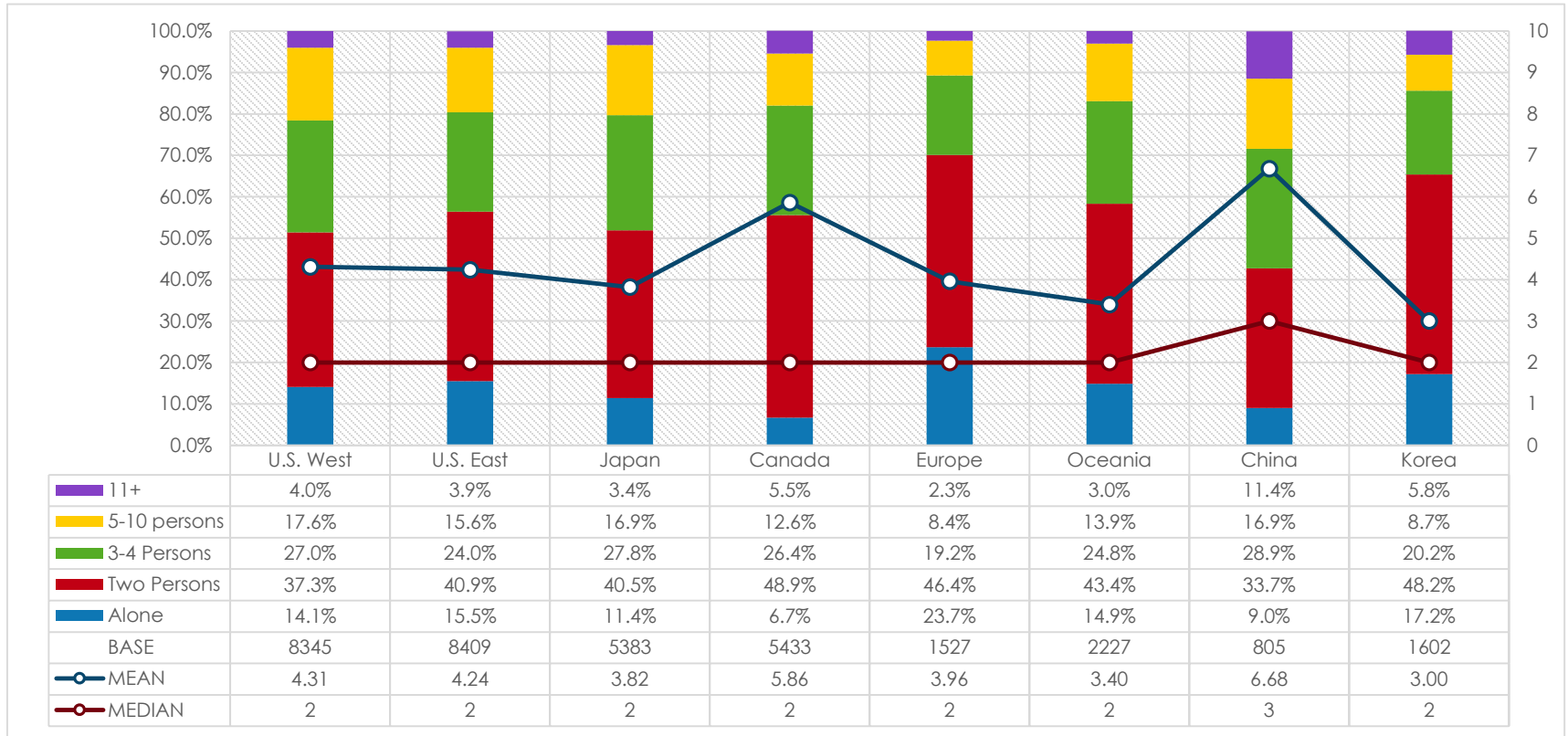
- More affluent visitors from the U.S. and Canada were more likely to have traveled to Hawai'i previously.
- Males traveled more frequently to Hawai'i among the following visitor markets compared to females: U.S. West, U.S. East, and Canada.
- Those who were traveling in smaller travel parties were more likely to be repeat visitors among the following MMAs: U.S. West (1-2 persons), U.S. East (1-2 persons), and Japan (Alone).

SECTION – TRAVEL PARTY

TRAVEL PARTY MEMBERS

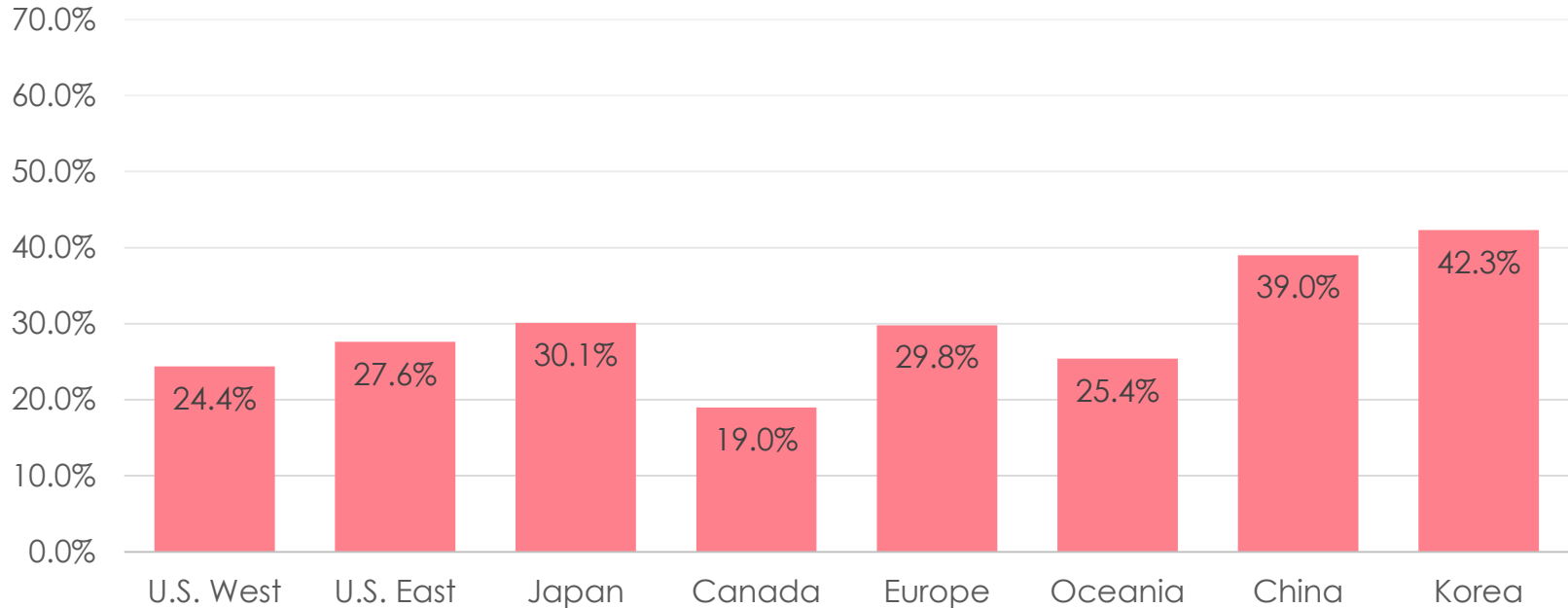
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Spouse | 61.1% | 61.0% | 50.6% | 63.3% | 51.4% | 66.8% | 45.3% | 62.0% |
| Other adult family | 29.9% | 26.5% | 23.8% | 28.6% | 17.1% | 22.3% | 25.0% | 16.4% |
| Child under 18 | 27.6% | 19.5% | 15.9% | 22.9% | 14.1% | 23.1% | 22.4% | 14.6% |
| Friends/ associates | 15.7% | 17.5% | 21.9% | 18.2% | 14.1% | 15.7% | 24.3% | 14.2% |
| Alone | 9.0% | 10.3% | 7.1% | 6.0% | 13.4% | 7.1% | 8.5% | 3.1% |
| Girlfriend/ boyfriend | 7.1% | 6.6% | 6.9% | 8.3% | 12.0% | 4.1% | 9.7% | 7.4% |
| Same-sex partner | 1.2% | 1.2% | 0.3% | 0.9% | 1.7% | 1.1% | 2.2% | 0.2% |

TRAVEL PARTY SIZE

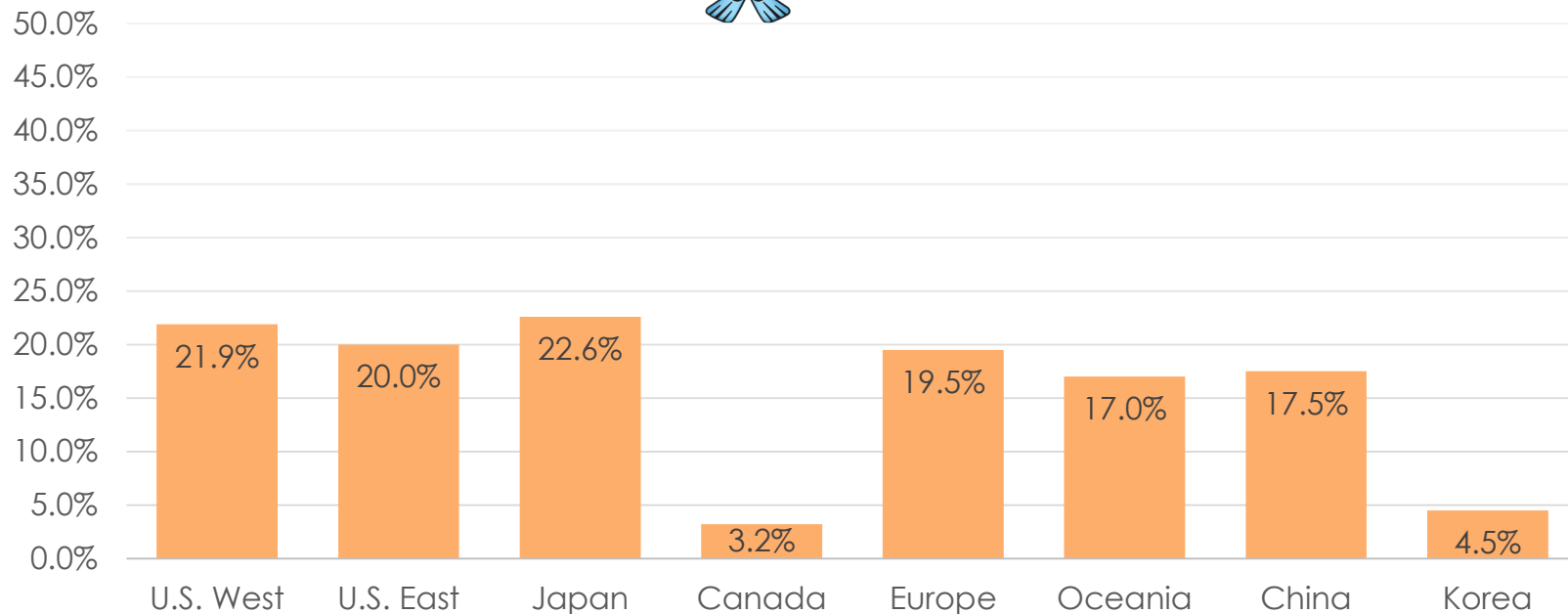


SECTION – SIGNAGE

HVCB POST-ARRIVAL EXPERIENCE LOGO



OCEAN SAFETY LOGO



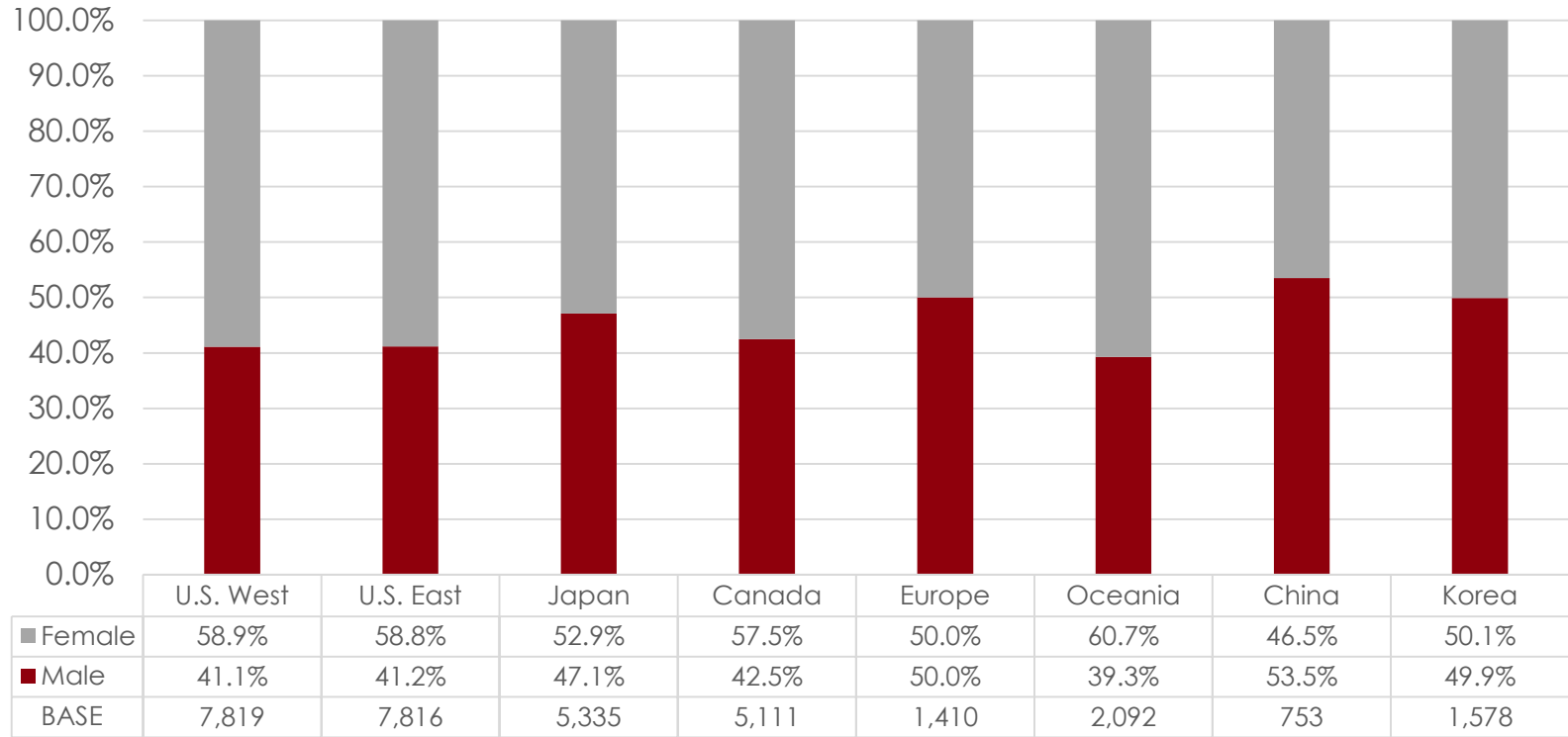
OCEAN SAFETY LOGO



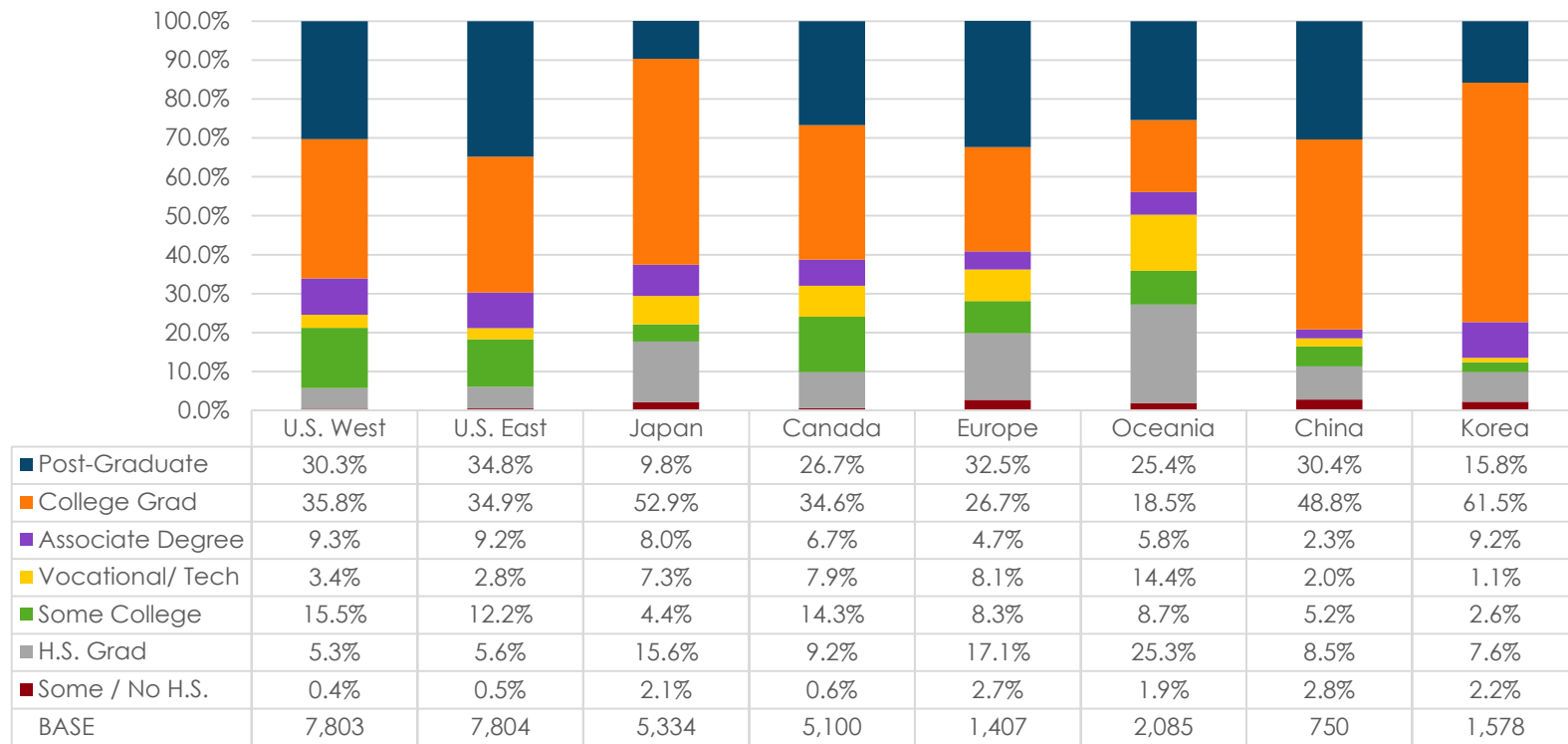
- Females were less likely to recall seeing this logo from the following visitor markets: U.S. West, U.S. East, and Japan.
- Visitors from the U.S. in larger travel parties of three or more were more likely to recall seeing this logo than were those in smaller groups.

SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



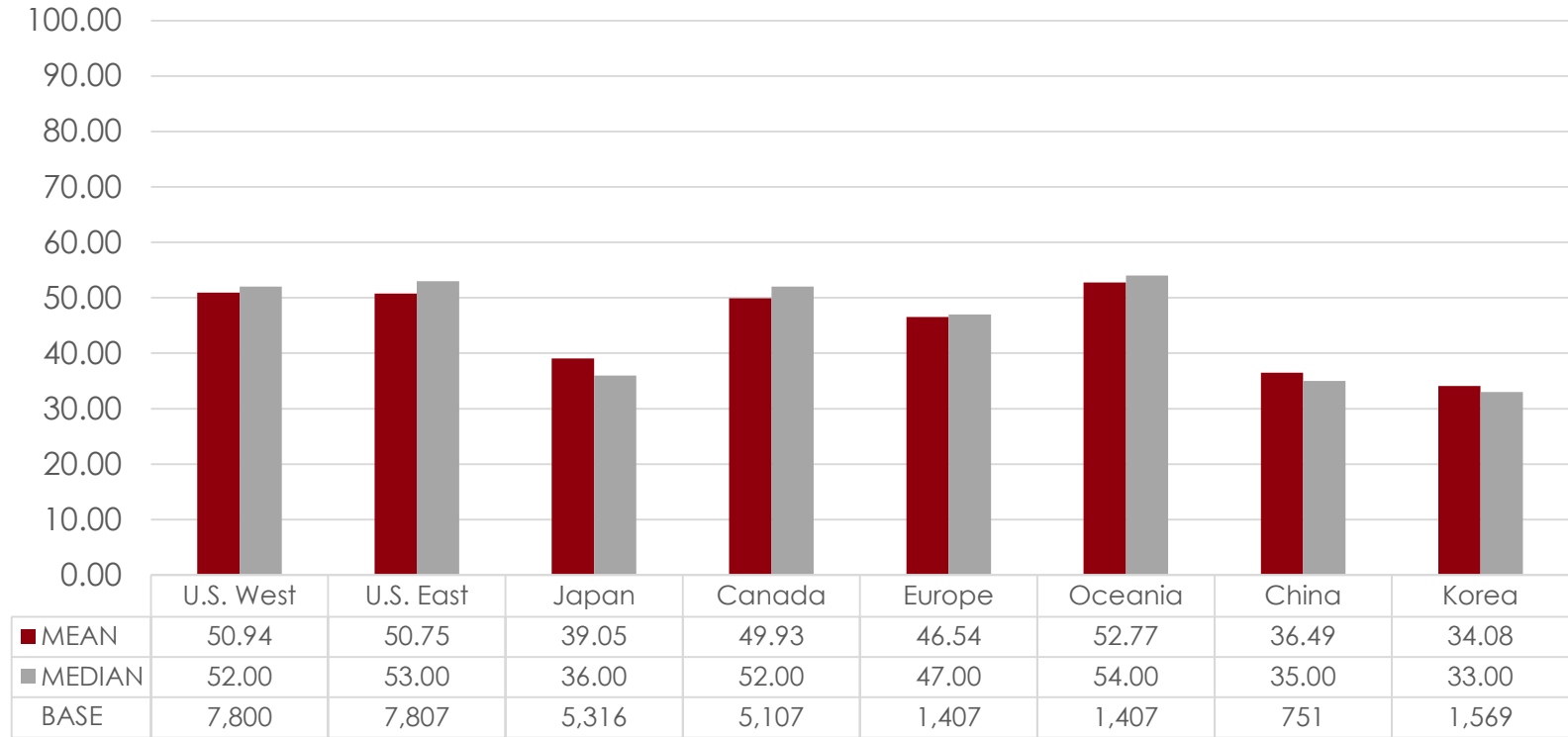
VISITOR PROFILE – EDUCATION



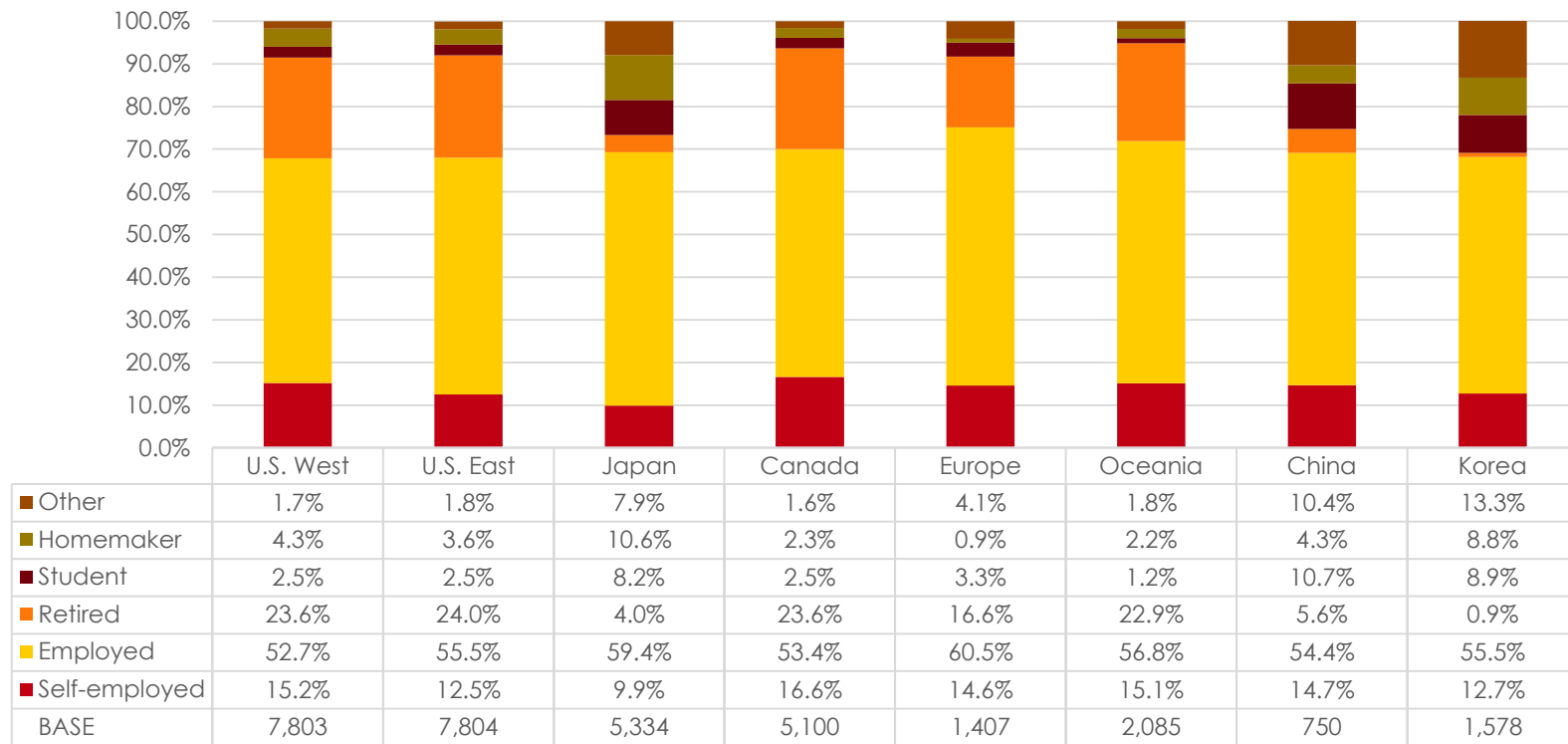
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

| | U.S. West | U.S. East | Canada | Europe | Oceania |
|------------------------|-----------|-----------|--------|--------|---------|
| < \$40,000 | 7.1% | 6.5% | 7.7% | 15.1% | 9.7% |
| \$40,000 to \$59,999 | 8.1% | 8.5% | 9.7% | 15.2% | 11.0% |
| \$60,000 to \$79,999 | 10.9% | 11.4% | 12.4% | 15.9% | 13.3% |
| \$80,000 to \$99,999 | 10.3% | 10.6% | 14.3% | 12.6% | 12.1% |
| \$100,000 to \$124,999 | 15.0% | 14.7% | 15.7% | 10.7% | 15.5% |
| \$125,000 to \$149,999 | 12.2% | 10.9% | 11.5% | 8.9% | 10.4% |
| \$150,000 to \$174,999 | 9.1% | 8.5% | 8.8% | 5.4% | 9.8% |
| \$175,000 to \$199,999 | 5.8% | 5.9% | 5.5% | 4.6% | 5.6% |
| \$200,000 to \$249,999 | 7.8% | 8.7% | 5.5% | 4.2% | 5.6% |
| \$250,000 + | 13.7% | 14.2% | 8.9% | 7.2% | 7.0% |

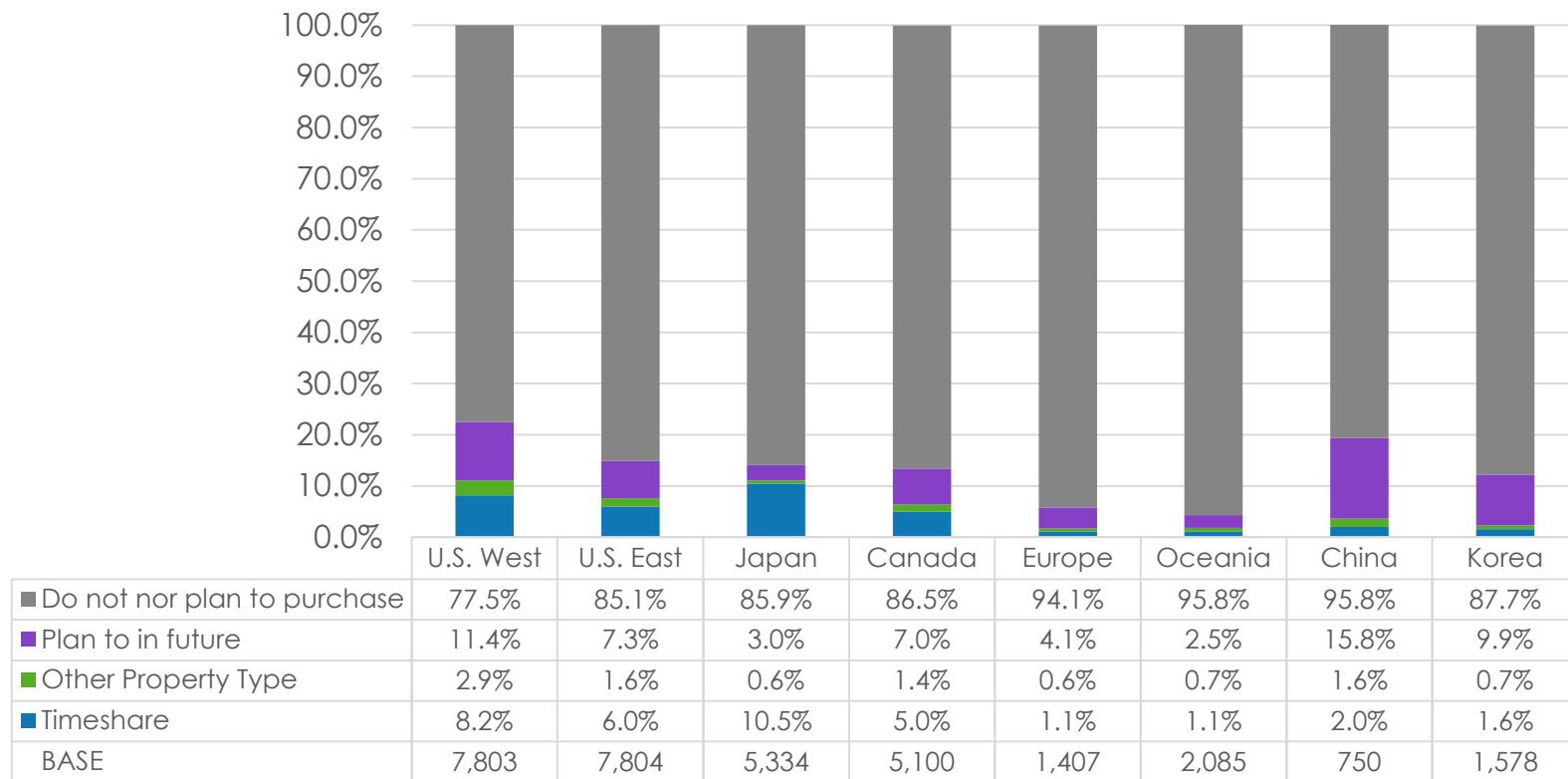
VISITOR PROFILE – AGE



VISITOR PROFILE – EMPLOYMENT STATUS



VISITOR PROFILE – HAWAII PROPERTY OWNER



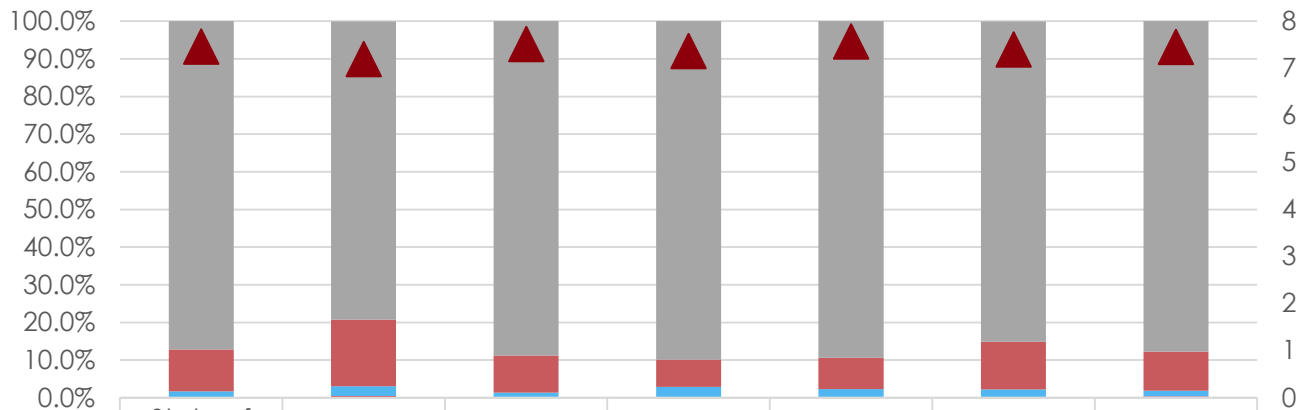
COMPETITIVE BRANDSET

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Other U.S. | 80.6% | 85.7% | 19.7% | 72.1% | 59.4% | 56.2% | 38.7% | 21.3% |
| California | 68.3% | 48.0% | 8.7% | 41.0% | 50.3% | 45.6% | 23.9% | 12.6% |
| Las Vegas | 55.6% | 36.9% | 7.6% | 38.6% | 38.0% | 38.8% | 23.7% | 11.4% |
| Europe | 31.9% | 36.7% | 21.6% | 42.3% | 87.4% | 38.1% | 37.4% | 28.0% |
| Florida | 31.7% | 62.4% | 5.6% | 34.4% | 31.5% | 13.2% | 7.2% | 5.8% |
| New York City | 30.3% | 49.0% | 8.7% | 30.9% | 43.9% | 36.9% | 21.4% | 9.9% |
| Canada | 28.1% | 30.2% | 6.0% | 73.1% | 23.9% | 24.5% | 18.6% | 7.5% |
| Mexico | 35.7% | 28.5% | 2.8% | 38.6% | 14.2% | 7.0% | 4.1% | 3.3% |
| Caribbean | 19.9% | 37.7% | 2.5% | 35.5% | 21.6% | 6.6% | 2.7% | 2.3% |
| Japan | 7.1% | 6.3% | 33.1% | 6.8% | 9.9% | 11.0% | 52.9% | 46.5% |
| Alaska | 16.5% | 12.2% | 1.2% | 8.0% | 4.2% | 12.9% | 24.1% | 33.5% |
| Other Asia | 7.9% | 7.0% | 20.6% | 10.0% | 18.4% | 23.1% | 4.1% | 2.3% |
| Australia | 5.9% | 5.3% | 11.4% | 8.6% | 17.0% | 73.6% | 19.7% | 10.9% |

SECTION – U.S. WEST

OVERALL SATISFACTION – MOST RECENT VISIT – U.S. WEST

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



| | | | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Extremely satisfied (7-8) | 87.2% | 79.2% | 88.9% | 90.0% | 89.5% | 85.0% | 87.9% |
| ■ Somewhat satisfied (5-6) | 11.1% | 17.6% | 9.8% | 7.2% | 8.3% | 12.7% | 10.3% |
| ■ Somewhat dissatisfied (3-4) | 1.5% | 2.7% | 1.2% | 2.9% | 2.3% | 2.1% | 1.6% |
| ■ Not at all satisfied (1-2) | 0.2% | 0.4% | 0.2% | 0.0% | 0.0% | 0.1% | 0.3% |
| BASE | 8,348 | 3,315 | 2,719 | 71 | 85 | 2,198 | 1,584 |
| ▲ MEAN | 7.46 | 7.19 | 7.51 | 7.36 | 7.57 | 7.40 | 7.45 |

PRIMARY PURPOSE OF TRIP U.S. WEST

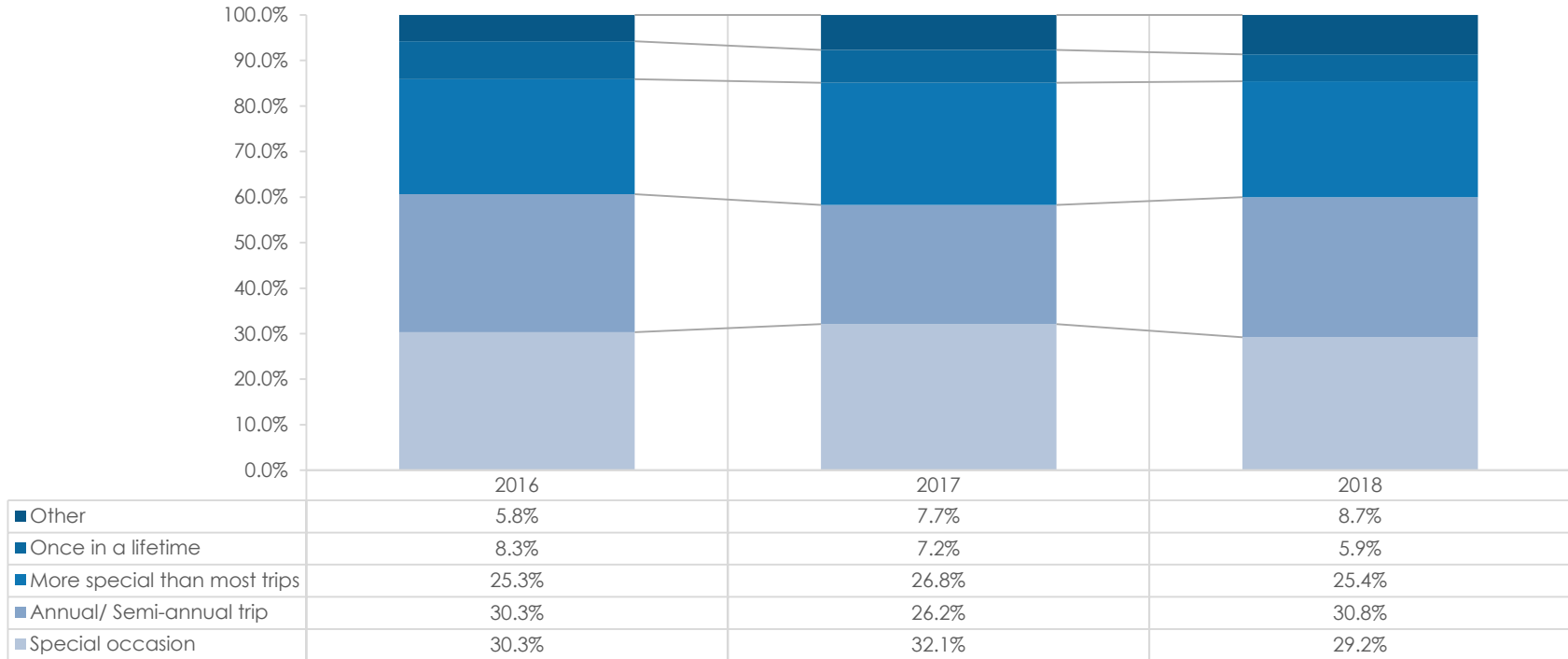
| | 2017 | 2018 |
|---|-------|-------|
| Vacation | 60.3% | 59.5% |
| Visit friends or relatives | 8.8% | 8.2% |
| Anniversary/ birthday | 9.8% | 7.8% |
| Attend a business meeting or conduct business | 4.0% | 3.9% |
| Attend/ participate in a wedding/ vow renewal | 3.2% | 3.2% |
| Have a vacation home/ timeshare | 0.3% | 3.0% |
| Attend a convention, conference or seminar | 2.8% | 2.6% |
| Family gathering/ reunion | 1.8% | 2.5% |
| Honeymoon | 2.4% | 2.0% |

SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE

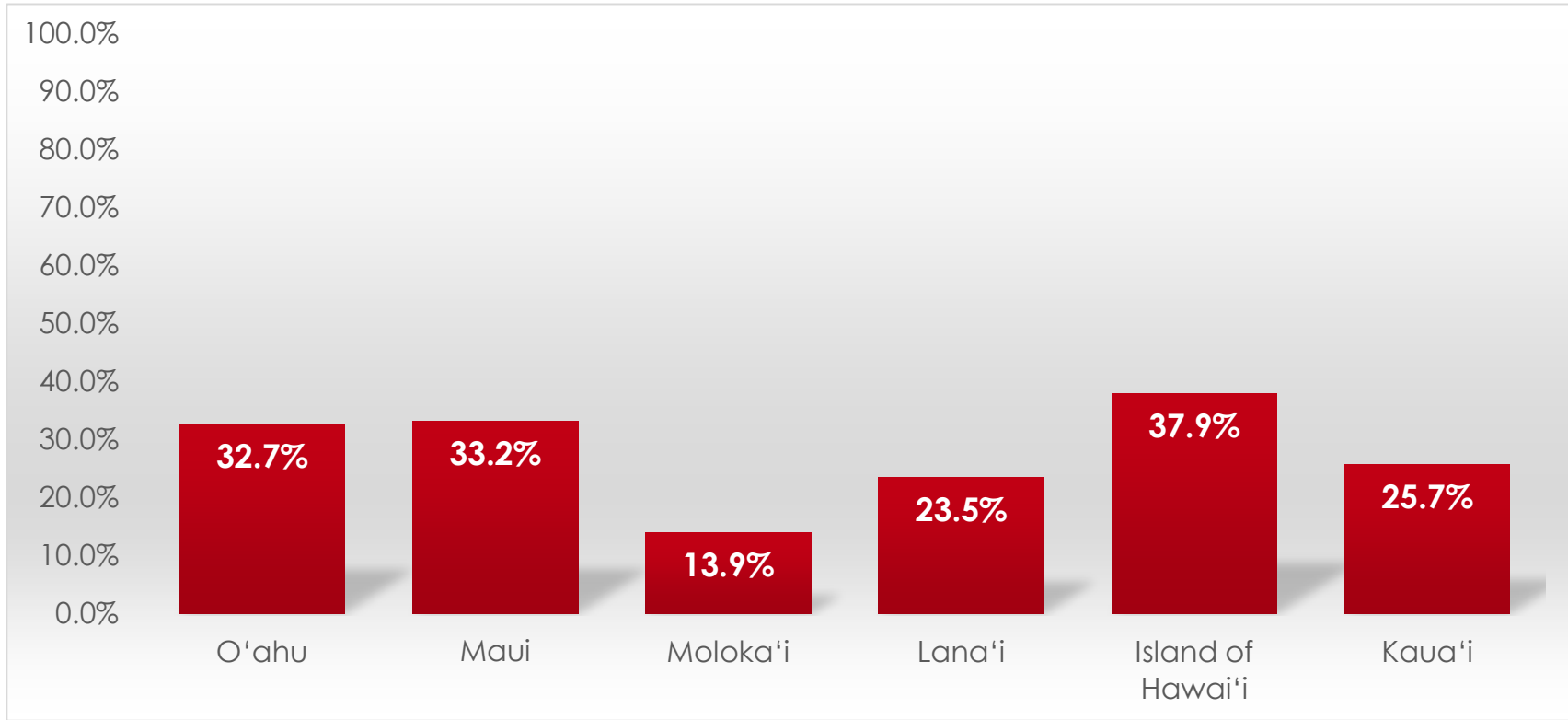
U.S. WEST

| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 88.8% | 82.8% |
| Visit friends/ relatives | 20.4% | 16.6% |
| Anniversary/ birthday | 20.6% | 14.1% |
| Family gathering/ reunion | 9.0% | 7.1% |
| Vacation home/ timeshare | .4% | 6.7% |
| Business trip | 6.4% | 5.5% |
| Attend wedding/ vow renewal | 3.7% | 3.7% |
| Convention, conference, seminar | 3.8% | 3.3% |
| Honeymoon | 3.3% | 2.7% |

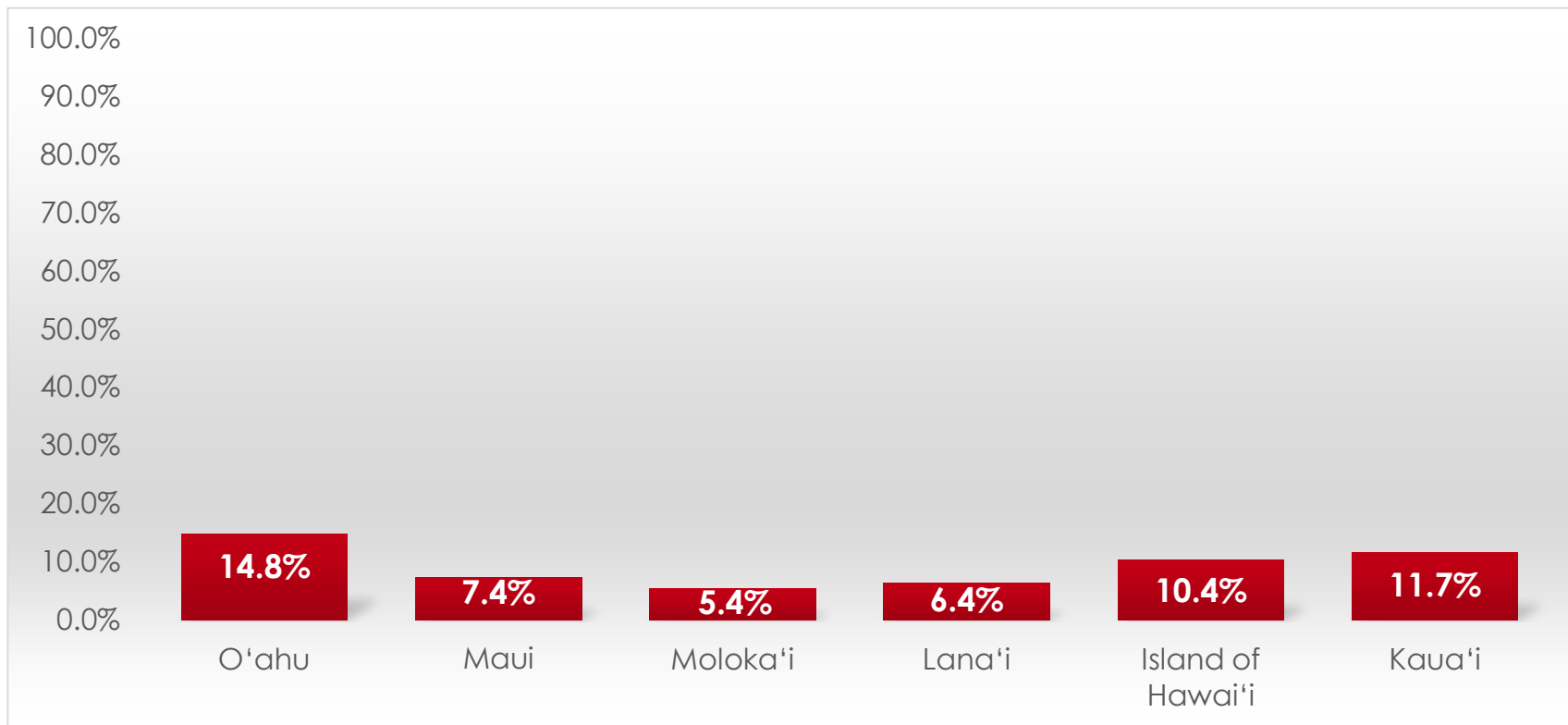
VACATION TRIP DESCRIPTION – U.S. WEST



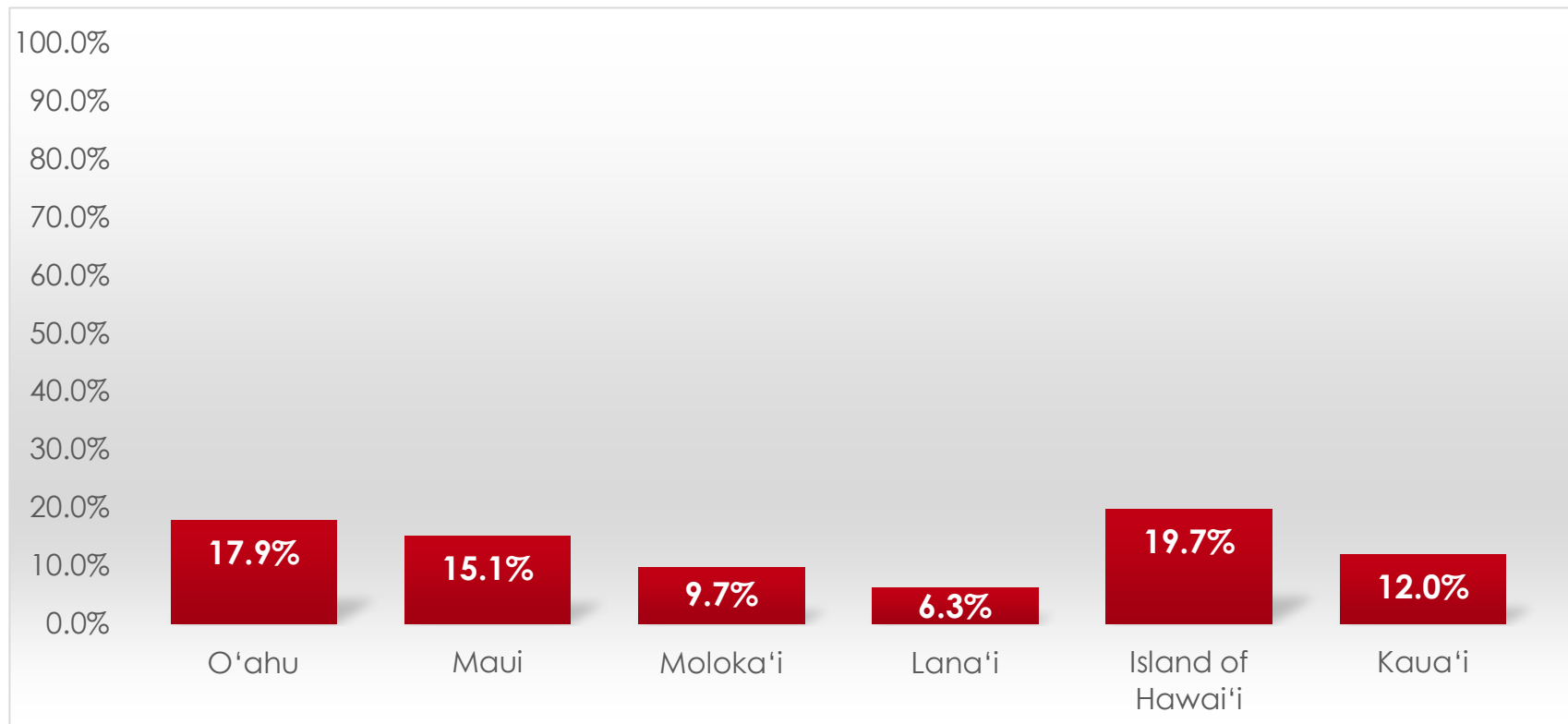
ADVERTISING AWARENESS – U.S. WEST



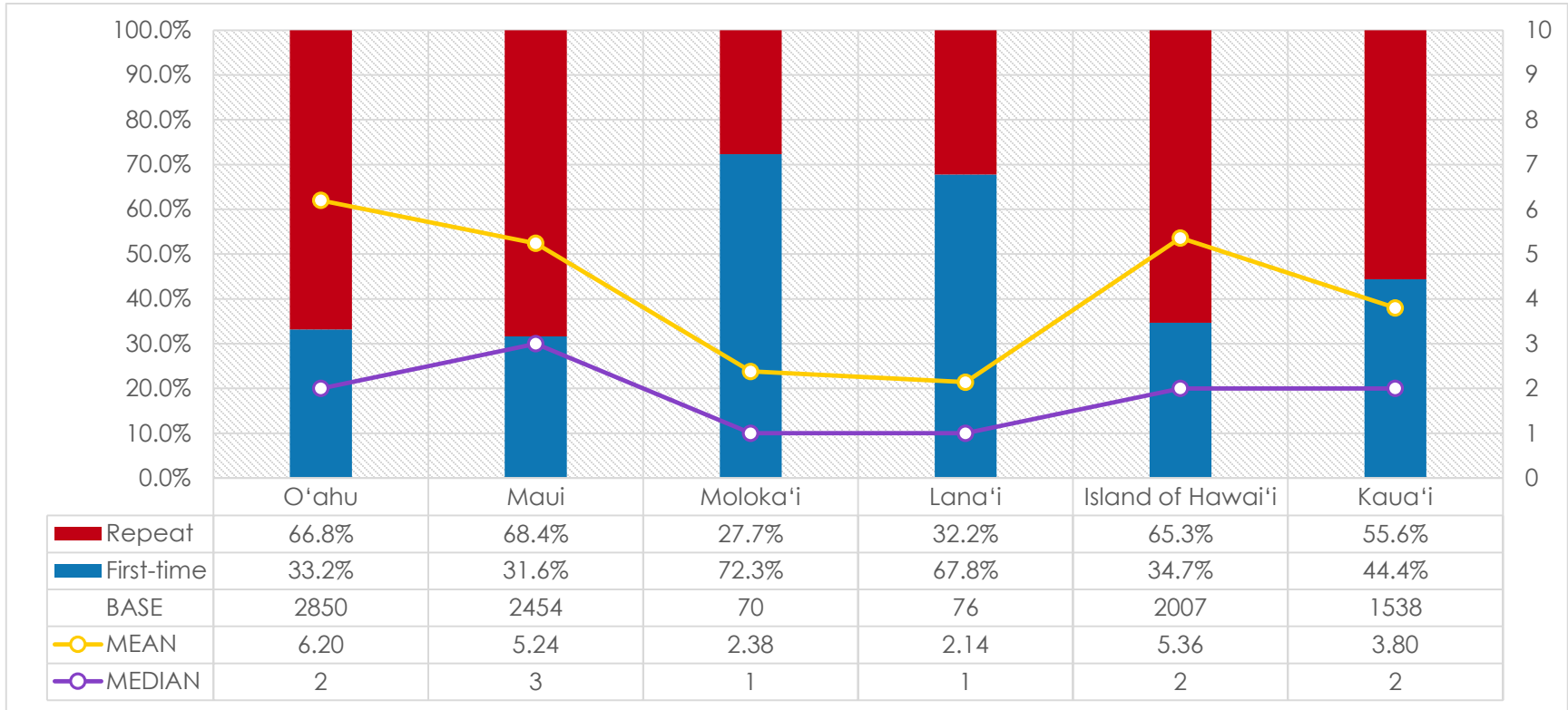
IMPACT OF LOCATION FILMING – U.S. WEST



IMPACT OF HAWAIIAN MUSIC – U.S. WEST



1ST TIME VS REPEAT VISITOR – U.S. WEST

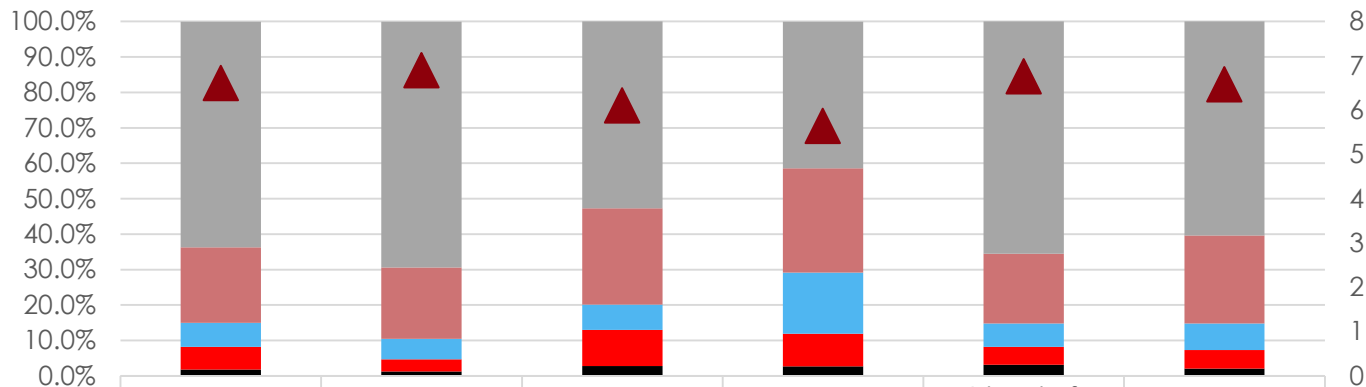


TRAVEL PARTY MEMBERS – U.S. WEST

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 63.3% | 64.5% | 61.1% |
| Other adult family | 28.8% | 29.1% | 29.9% |
| Child under 18 | 25.4% | 22.9% | 27.6% |
| Friends/ associates | 16.5% | 15.9% | 15.7% |
| Alone | 10.7% | 9.0% | 9.0% |
| Girlfriend/ boyfriend | 6.4% | 5.5% | 7.1% |
| Same-sex partner | .6% | 1.1% | 1.2% |

LIKELIHOOD OF RETURN VISIT – U.S. WEST

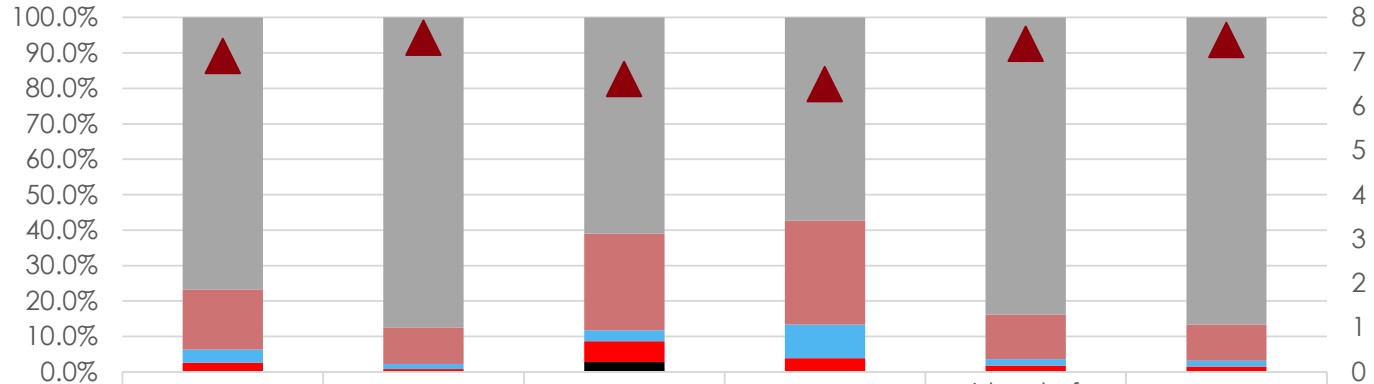
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 63.6% | 69.3% | 52.8% | 41.3% | 67.1% | 60.5% |
| ■ Somewhat likely (5-6) | 21.3% | 20.1% | 27.2% | 29.4% | 19.7% | 24.8% |
| ■ Somewhat unlikely (3-4) | 6.8% | 5.8% | 7.1% | 17.3% | 6.6% | 7.5% |
| ■ Very unlikely (1-2) | 6.4% | 3.4% | 10.2% | 9.2% | 5.0% | 5.2% |
| ■ Not sure | 1.8% | 1.3% | 2.8% | 2.7% | 3.2% | 2.1% |
| BASE | 2,828 | 2,433 | 70 | 75 | 1,995 | 1,530 |
| ▲ MEAN | 6.61 | 6.90 | 6.10 | 5.64 | 6.76 | 6.58 |

BRAND/DESTINATION ADVOCACY – U.S. WEST

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------|-------|-------|----------|--------|-------------------|--------|
| Very likely (7-8) | 76.7% | 87.6% | 61.1% | 57.3% | 83.8% | 86.6% |
| Somewhat likely (5-6) | 17.0% | 10.2% | 27.3% | 29.3% | 12.6% | 10.2% |
| Somewhat unlikely (3-4) | 3.7% | 1.5% | 3.0% | 9.5% | 1.8% | 1.7% |
| Very unlikely (1-2) | 2.5% | 0.7% | 5.9% | 3.9% | 1.7% | 1.2% |
| Not sure | 0.1% | 0.1% | 2.8% | 0.0% | 0.1% | 0.3% |
| BASE | 2,809 | 2,425 | 69 | 75 | 1,979 | 1,526 |
| MEAN | 7.13 | 7.54 | 6.61 | 6.49 | 7.40 | 7.49 |

ACTIVITIES – SIGHTSEEING – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.8% | 95.9% | 98.5% | 85.4% | 96.6% | 97.0% |
| On own (self-guided) | 78.7% | 85.0% | 81.1% | 34.8% | 87.8% | 87.4% |
| Helicopter/ airplane | 2.4% | 3.9% | 10.2% | 2.7% | 7.2% | 14.8% |
| Boat/ submarine/ whale | 14.7% | 33.3% | 7.2% | 25.2% | 23.9% | 27.4% |
| Visit towns | 43.4% | 57.3% | 53.7% | 32.3% | 59.5% | 64.9% |
| Limo/ van/ bus tour | 11.1% | 5.4% | 5.9% | 9.2% | 6.8% | 5.6% |
| Scenic views/ natural landmark | 54.6% | 57.3% | 58.3% | 35.7% | 63.5% | 71.8% |
| Movie/ TV/ film location | 7.9% | 0.5% | 0.0% | 1.2% | 1.2% | 5.1% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - U.S. WEST

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 96.7% | 95.8% |
| On own (self-guided) | 86.7% | 85.1% |
| Helicopter/ airplane | 8.7% | 6.6% |
| Boat/ submarine/ whale | 29.8% | 25.9% |
| Visit towns | 34.6% | 56.3% |
| Limo/ van/ bus tour | 9.5% | 7.8% |
| Scenic views/ natural landmark | 70.3% | 61.4% |
| Movie/ TV/ film location | 5.4% | 4.1% |

ACTIVITIES – RECREATION – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.9% | 97.9% | 92.8% | 88.1% | 96.6% | 96.5% |
| Beach/ sunbathing | 81.9% | 89.1% | 63.7% | 70.9% | 80.8% | 82.3% |
| Bodyboard/ Standup paddle board | 15.3% | 17.2% | 5.7% | 2.7% | 15.5% | 15.4% |
| Surfing | 7.9% | 6.8% | 1.5% | 1.4% | 3.5% | 6.3% |
| Canoeing/ kayak | 6.2% | 4.8% | 7.2% | 2.6% | 8.8% | 15.4% |
| Swim- ocean | 61.6% | 72.9% | 37.9% | 57.6% | 66.0% | 62.0% |
| Snorkel | 35.8% | 56.3% | 24.8% | 44.0% | 54.8% | 45.7% |
| Windsurf/ Kitesurf | 0.2% | 0.3% | 0.0% | 0.0% | 0.2% | 0.2% |
| Jet ski/ Parasail | 2.4% | 3.4% | 0.0% | 0.0% | 1.9% | 0.2% |
| Scuba | 2.0% | 3.8% | 1.5% | 4.1% | 3.6% | 2.2% |
| Fishing | 2.4% | 2.7% | 10.0% | 2.7% | 4.7% | 3.3% |
| Golf | 4.8% | 7.6% | 3.0% | 8.1% | 8.3% | 8.4% |

STATEWIDE - ACTIVITIES – RECREATION – U.S. WEST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 96.5% | 97.0% |
| Beach/ sunbathing | 85.3% | 85.5% |
| Bodyboard/ Standup paddle board | 20.3% | 17.0% |
| Surfing | 7.1% | 6.7% |
| Canoeing/ kayak | 10.2% | 8.7% |
| Swim- ocean | NA | 68.3% |
| Snorkel | NA | 49.9% |
| Windsurf/ Kitesurf | 0.4% | 0.2% |
| Jet ski/ Parasail | 2.4% | 2.3% |
| Scuba | 4.1% | 3.1% |
| Fishing | 3.7% | 3.4% |
| Golf | 9.1% | 7.4% |

ACTIVITIES – RECREATION – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.9% | 97.9% | 92.8% | 88.1% | 96.6% | 96.5% |
| Run/ Jog/ Fitness walk | 28.4% | 32.6% | 17.4% | 6.8% | 26.6% | 30.0% |
| Spa | 7.8% | 12.6% | 1.5% | 10.7% | 8.4% | 8.5% |
| Hiking/Backpack/Camp | 31.6% | 27.4% | 39.1% | 14.6% | 29.4% | 37.2% |
| Agritourism | 12.3% | 11.2% | 5.9% | 2.6% | 16.9% | 11.6% |
| Sport event/ tournament | 4.0% | 1.6% | 1.5% | 4.1% | 3.1% | 0.9% |
| Park/ botanical garden | 33.2% | 32.3% | 25.8% | 12.1% | 43.6% | 41.1% |
| Waterpark | 2.7% | 0.9% | 0.0% | 1.2% | 0.9% | 0.7% |
| Mountain tube/ waterfall rappel | 0.6% | 1.1% | 0.0% | 0.0% | 0.8% | 7.1% |
| Zip-lining | 4.2% | 7.6% | 0.0% | 1.4% | 4.5% | 6.3% |
| Skydiving | 0.8% | 0.0% | 0.0% | 0.0% | 0.2% | 0.2% |
| All terrain vehicle (ATV) | 2.5% | 1.6% | 1.5% | 6.6% | 2.6% | 4.8% |
| Horseback riding | 1.7% | 1.7% | 1.5% | 1.4% | 2.7% | 2.5% |

STATEWIDE - ACTIVITIES – RECREATION – U.S. WEST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 96.5% | 97.0% |
| Run/ Jog/ Fitness walk | 35.5% | 30.8% |
| Spa | 9.2% | 10.1% |
| Hiking/Backpack/Camp | 28.5% | 32.4% |
| Agritourism | 9.9% | 13.6% |
| Sport event/ tournament | 1.9% | 2.8% |
| Park/ botanical garden | 40.7% | 38.2% |
| Waterpark | NA | 1.5% |
| Mountain tube/ waterfall rappel | NA | 2.0% |
| Zip-lining | NA | 6.0% |
| Skydiving | NA | 0.4% |
| All terrain vehicle (ATV) | NA | 2.9% |
| Horseback riding | NA | 2.3% |

ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.1% | 98.4% | 97.2% | 89.4% | 98.4% | 97.9% |
| Lunch/ sunset/ dinner/ evening cruise | 20.0% | 25.1% | 15.6% | 28.2% | 18.4% | 23.2% |
| Live music/ stage show | 31.5% | 32.4% | 23.0% | 5.3% | 28.4% | 27.2% |
| Nightclub/ dancing/ bar/ karaoke | 11.5% | 7.9% | 5.9% | 1.4% | 8.7% | 5.5% |
| Fine dining | 46.8% | 59.9% | 14.4% | 28.2% | 49.9% | 53.3% |
| Family restaurant | 59.0% | 62.4% | 45.2% | 21.3% | 63.5% | 60.5% |
| Fast food | 43.6% | 32.5% | 25.1% | 10.3% | 31.1% | 30.5% |
| Food truck | 39.4% | 24.3% | 15.4% | 1.2% | 18.2% | 33.7% |
| Café/ coffee house | 41.2% | 44.6% | 28.7% | 17.5% | 51.3% | 45.0% |
| Ethnic dining | 34.6% | 27.4% | 20.2% | 13.4% | 31.3% | 26.8% |
| Prepared own meal | 37.6% | 59.6% | 47.8% | 17.2% | 60.1% | 60.3% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 98.9% | 98.4% |
| Lunch/ sunset/ dinner/ evening cruise | 27.3% | 23.0% |
| Live music/ stage show | 31.6% | 32.2% |
| Nightclub/ dancing/ bar/ karaoke | 9.3% | 9.4% |
| Fine dining | 53.2% | 53.6% |
| Family restaurant | 70.8% | 62.8% |
| Fast food | 39.4% | 36.5% |
| Food truck | NA | 30.7% |
| Café/ coffee house | 42.5% | 46.6% |
| Ethnic dining | 30.5% | 31.9% |
| Prepared own meal | 52.2% | 55.1% |

ACTIVITIES – SHOPPING – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.1% | 96.8% | 88.7% | 57.3% | 97.0% | 96.1% |
| Mall/ department store | 51.0% | 44.7% | 3.0% | 5.0% | 31.4% | 25.1% |
| Designer boutique | 15.5% | 20.7% | 4.3% | 7.8% | 13.7% | 17.0% |
| Hotel/ resort store | 37.1% | 34.5% | 7.1% | 18.7% | 28.9% | 23.2% |
| Swap meet/ flea market | 21.4% | 15.6% | 7.4% | 1.2% | 16.9% | 8.5% |
| Discount/ outlet store | 16.0% | 21.6% | 4.3% | 3.8% | 12.9% | 12.7% |
| Supermarket | 52.8% | 72.2% | 50.6% | 10.7% | 72.6% | 71.0% |
| Farmer's market | 22.1% | 32.6% | 40.9% | 9.4% | 52.3% | 41.2% |
| Convenience store | 50.5% | 46.2% | 23.3% | 11.6% | 40.2% | 39.0% |
| Duty free store | 5.8% | 3.6% | 0.0% | 0.0% | 2.0% | 1.0% |
| Local shop/ artisan | 52.6% | 68.0% | 52.2% | 29.3% | 68.1% | 74.9% |

STATEWIDE - ACTIVITIES – SHOPPING – U.S. WEST

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 97.0% | 96.7% |
| Mall/ department store | 43.6% | 42.4% |
| Designer boutique | 22.3% | 17.5% |
| Hotel/ resort store | 33.0% | 33.5% |
| Swap meet/ flea market | 22.8% | 17.4% |
| Discount/ outlet store | 20.9% | 17.3% |
| Supermarket | 58.1% | 68.2% |
| Farmer's market | 33.0% | 37.2% |
| Convenience store | 42.9% | 46.5% |
| Duty free store | 3.1% | 3.7% |
| Local shop/ artisan | 68.4% | 65.7% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---|-------|-------|----------|--------|------------------|--------|
| TOTAL | 75.7% | 66.0% | 63.7% | 41.0% | 72.4% | 64.4% |
| Historic military site | 45.0% | 3.3% | 7.4% | 1.2% | 7.4% | 4.3% |
| Other historical site | 24.3% | 21.4% | 47.9% | 24.1% | 40.1% | 27.9% |
| Museum/ art gallery | 16.7% | 20.5% | 13.0% | 12.1% | 19.7% | 15.4% |
| Luau/ Polynesian show/ hula show | 34.8% | 31.8% | 4.3% | 3.8% | 24.5% | 26.2% |
| Lesson- ex. ukulele, hula, canoe, lei making | 8.6% | 6.1% | 4.4% | 1.4% | 6.0% | 4.7% |
| Play/ concert/ theatre | 6.1% | 4.3% | 2.8% | 2.7% | 3.3% | 2.8% |
| Art/ craft fair | 6.8% | 16.6% | 4.3% | 2.7% | 18.7% | 17.8% |
| Festival event | 5.3% | 3.1% | 4.3% | 3.9% | 6.5% | 4.9% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 74.1% | 71.8% |
| Historic military site | 27.5% | 18.6% |
| Other historical site | 30.9% | 29.2% |
| Museum/ art gallery | 22.9% | 19.2% |
| Luau/ Polynesian show/ hula show | 37.3% | 32.0% |
| Lesson- ex. ukulele, hula, canoe, lei making | 4.8% | 7.1% |
| Play/ concert/ theatre | 4.5% | 4.7% |
| Art/ craft fair | 14.4% | 15.0% |
| Festival event | 10.1% | 5.3% |

ACTIVITIES – TRANSPORTATION – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 90.9% | 93.9% | 82.4% | 63.8% | 92.6% | 94.9% |
| Airport shuttle | 21.3% | 15.5% | 7.1% | 9.5% | 15.2% | 15.6% |
| Trolley | 3.3% | 1.7% | 1.5% | 0.0% | 2.0% | 0.6% |
| Public bus | 9.7% | 1.9% | 1.3% | 1.4% | 1.6% | 1.2% |
| Tour bus/ tour van | 12.7% | 6.0% | 7.2% | 25.0% | 7.2% | 6.8% |
| Taxi/ limo | 11.4% | 5.3% | 5.9% | 8.0% | 5.7% | 3.6% |
| Rental car | 63.5% | 86.8% | 62.4% | 21.3% | 84.3% | 87.6% |
| Ride share | 21.4% | 8.9% | 3.0% | 0.0% | 7.2% | 3.5% |
| Bicycle rental | 2.5% | 1.8% | 4.3% | 1.4% | 2.0% | 4.1% |

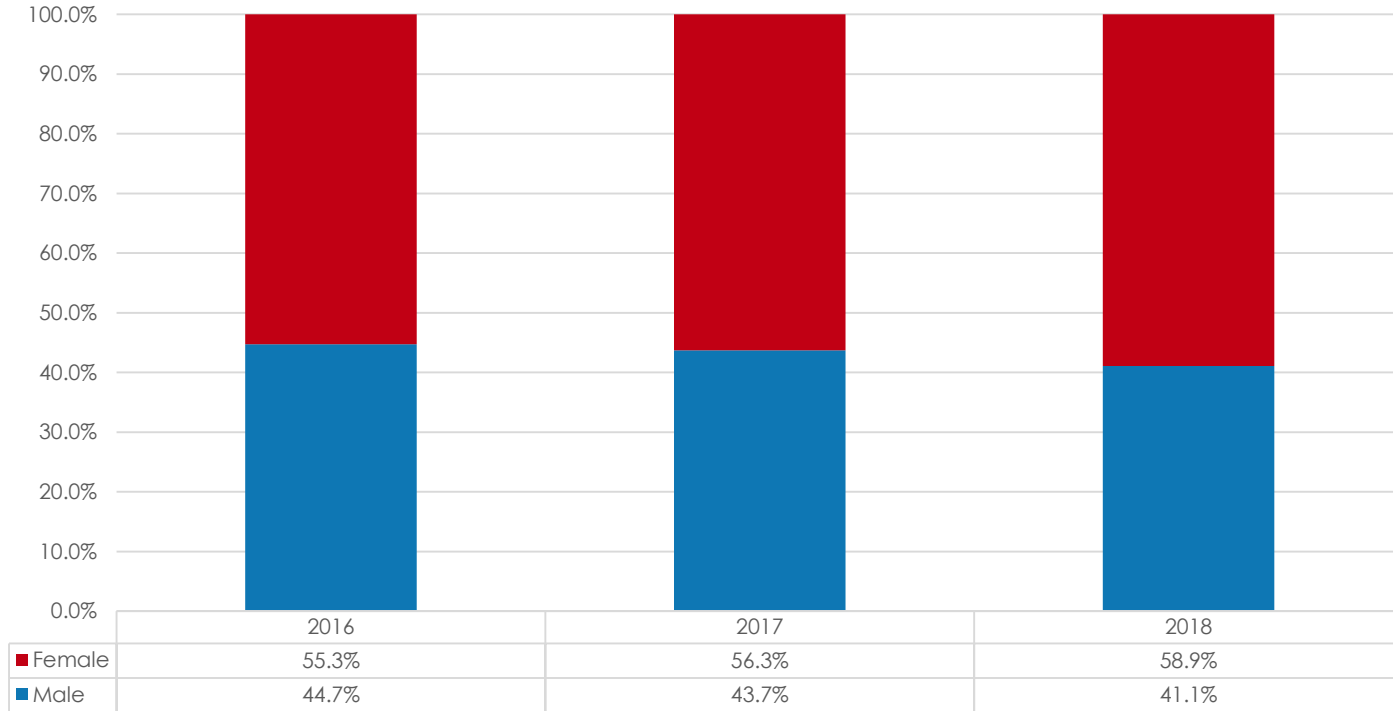
STATEWIDE - ACTIVITIES – TRANSPORTATION – U.S. WEST

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 95.1% | 92.8% |
| Airport shuttle | 19.6% | 18.4% |
| Trolley | 2.5% | 2.3% |
| Public bus | 5.2% | 4.4% |
| Tour bus/ tour van | 9.7% | 8.9% |
| Taxi/ limo | 13.4% | 7.6% |
| Rental car | 82.8% | 80.0% |
| Ride share | NA | 12.1% |
| Bicycle rental | NA | 2.7% |

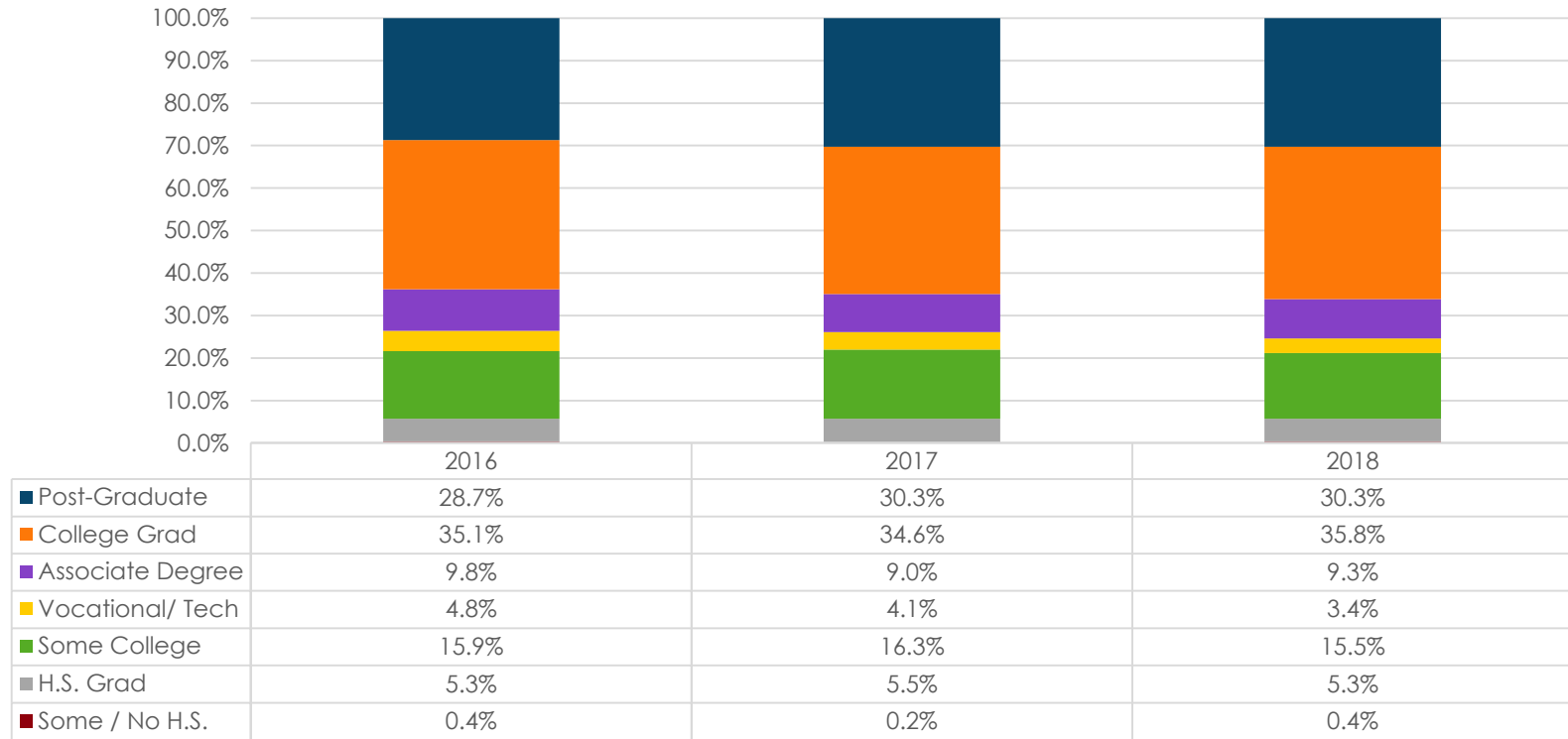
ACTIVITIES – OTHER – U.S. WEST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 40.4% | 22.3% | 21.7% | 12.2% | 33.6% | 18.6% |
| Visit friends/ family | 39.7% | 21.9% | 21.7% | 10.9% | 32.4% | 17.4% |
| Volunteer- non-profit | 1.3% | 0.7% | 1.5% | 1.4% | 1.9% | 1.9% |

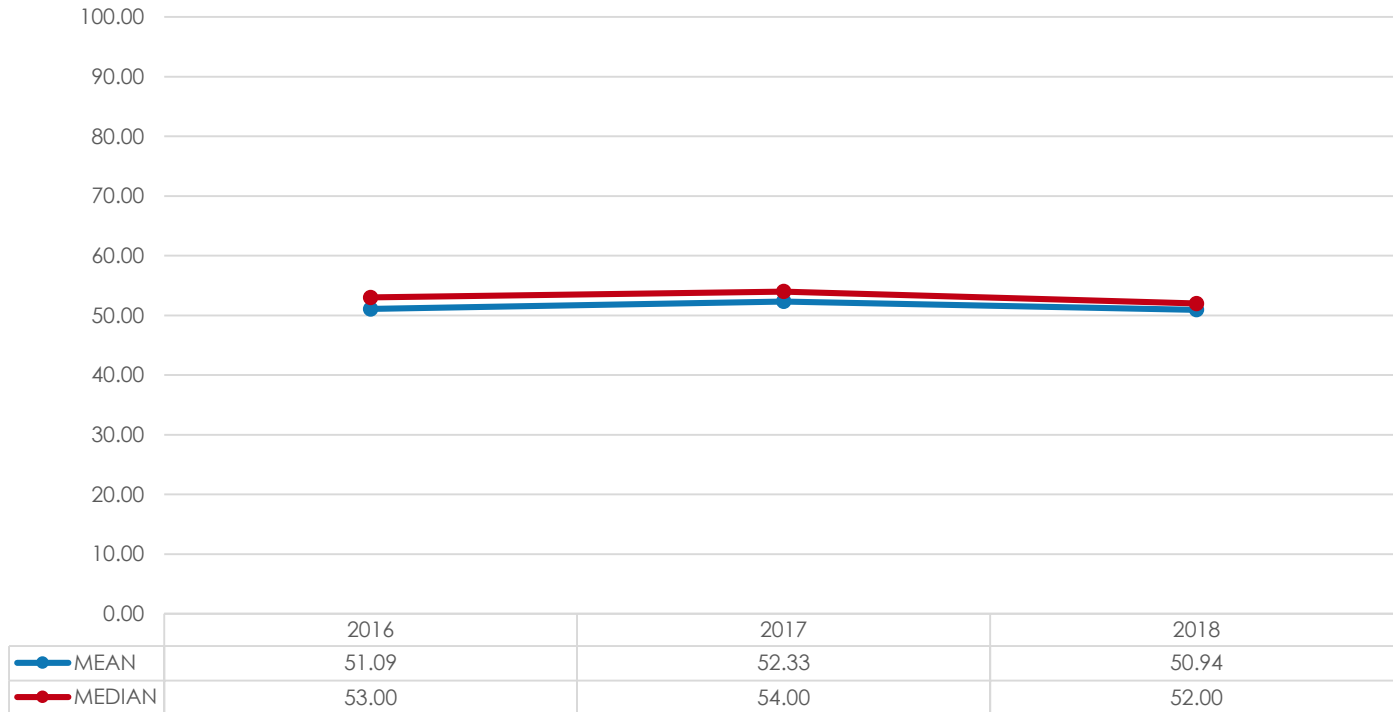
VISITOR PROFILE – GENDER – U.S. WEST



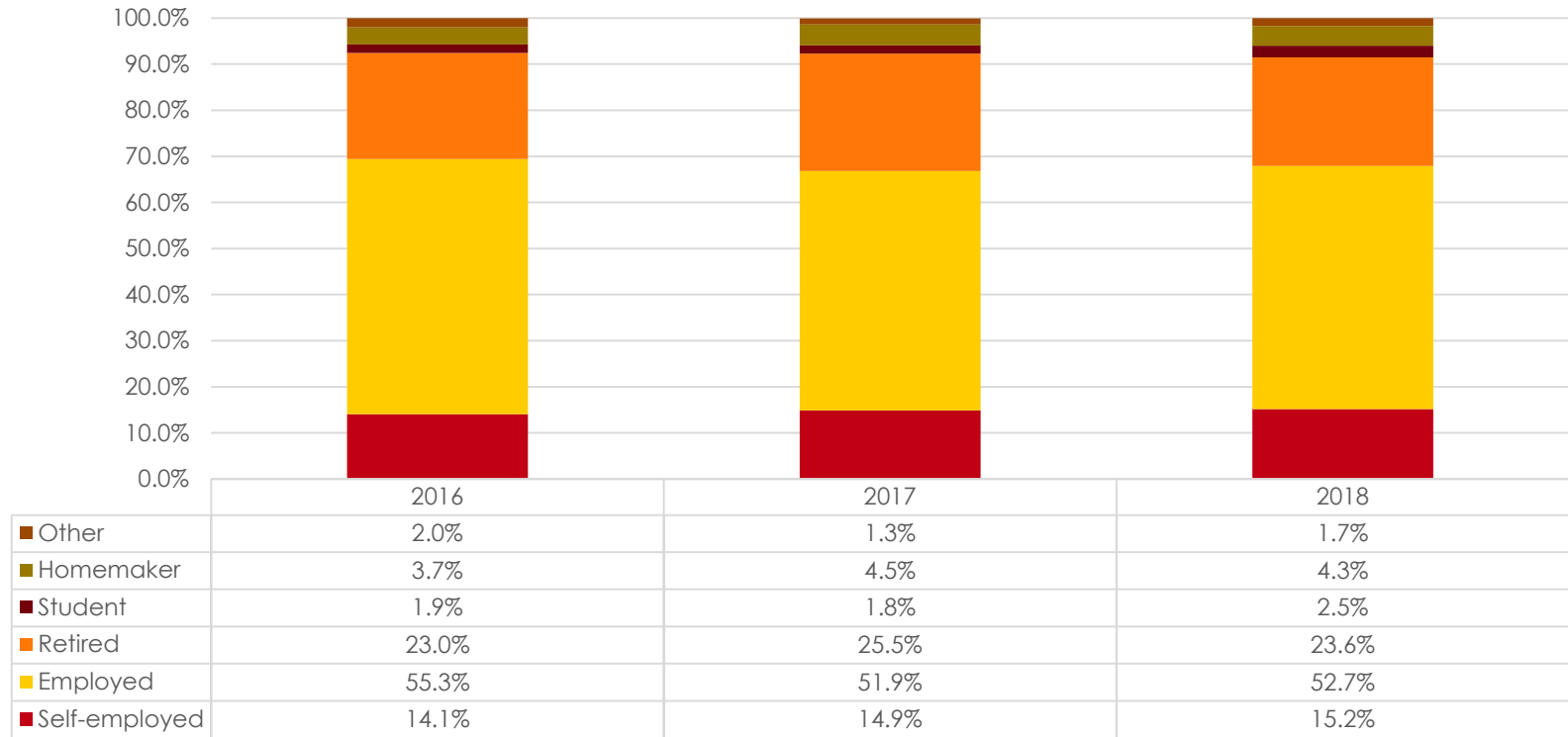
VISITOR PROFILE – EDUCATION – U.S. WEST



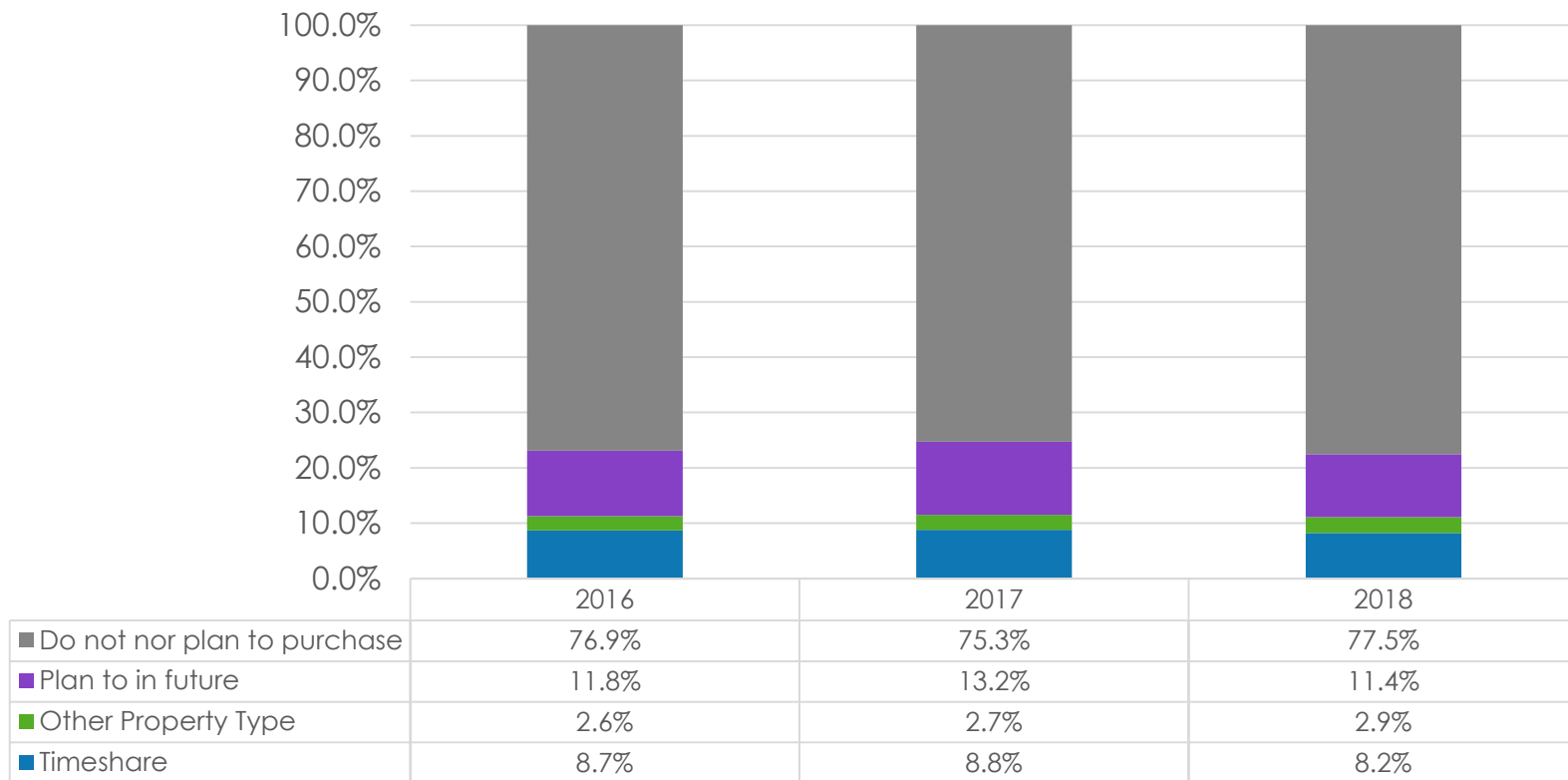
VISITOR PROFILE – AGE – U.S. WEST



VISITOR PROFILE – EMPLOYMENT STATUS – U.S. WEST



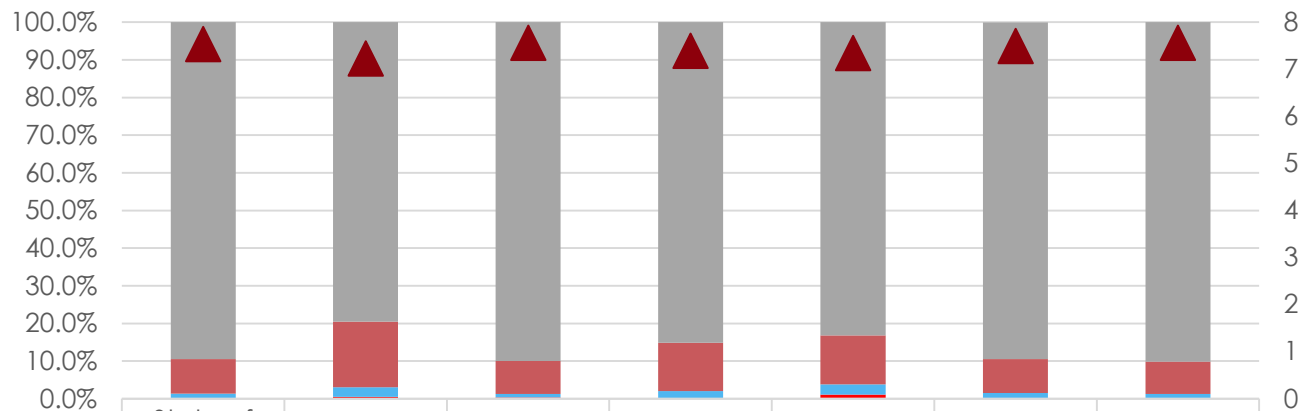
VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. WEST



SECTION – U.S. EAST

OVERALL SATISFACTION – MOST RECENT VISIT – U.S. EAST

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



| | State of Hawai'i Overall | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------------|--------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Extremely satisfied (7-8) | 89.5% | 79.5% | 90.1% | 85.1% | 83.2% | 89.4% | 90.1% |
| ■ Somewhat satisfied (5-6) | 9.1% | 17.4% | 8.7% | 12.9% | 13.0% | 9.0% | 8.6% |
| ■ Somewhat dissatisfied (3-4) | 1.2% | 2.6% | 1.0% | 2.0% | 2.7% | 1.4% | 1.2% |
| ■ Not at all satisfied (1-2) | 0.2% | 0.5% | 0.3% | 0.0% | 1.1% | 0.1% | 0.1% |
| BASE | 8,409 | 4,751 | 3,386 | 101 | 186 | 2,415 | 2,023 |
| ▲ MEAN | 7.53 | 7.23 | 7.56 | 7.39 | 7.34 | 7.49 | 7.56 |

PRIMARY TRIP PURPOSE

U.S. EAST

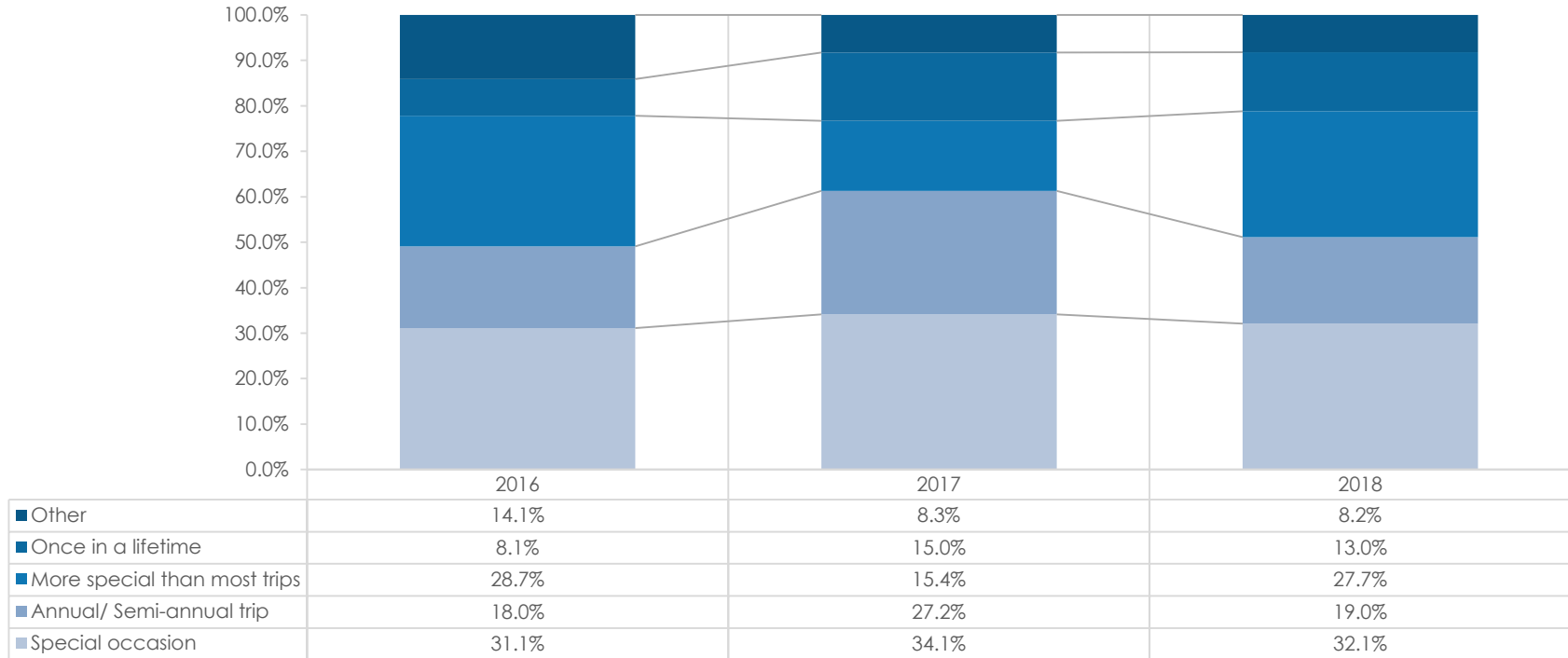
| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 52.9% | 55.8% |
| Visit friends/ relatives | 10.3% | 9.3% |
| Anniversary/ birthday | 9.8% | 9.0% |
| Business trip | 5.3% | 4.7% |
| Convention, conference, seminar | 4.5% | 4.1% |
| Honeymoon | 4.9% | 3.8% |
| Attend wedding/ vow renewal | 2.7% | 2.8% |
| Vacation home/ timeshare | 0.3% | 2.2% |
| Family gathering/ reunion | 1.6% | 1.6% |

SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE

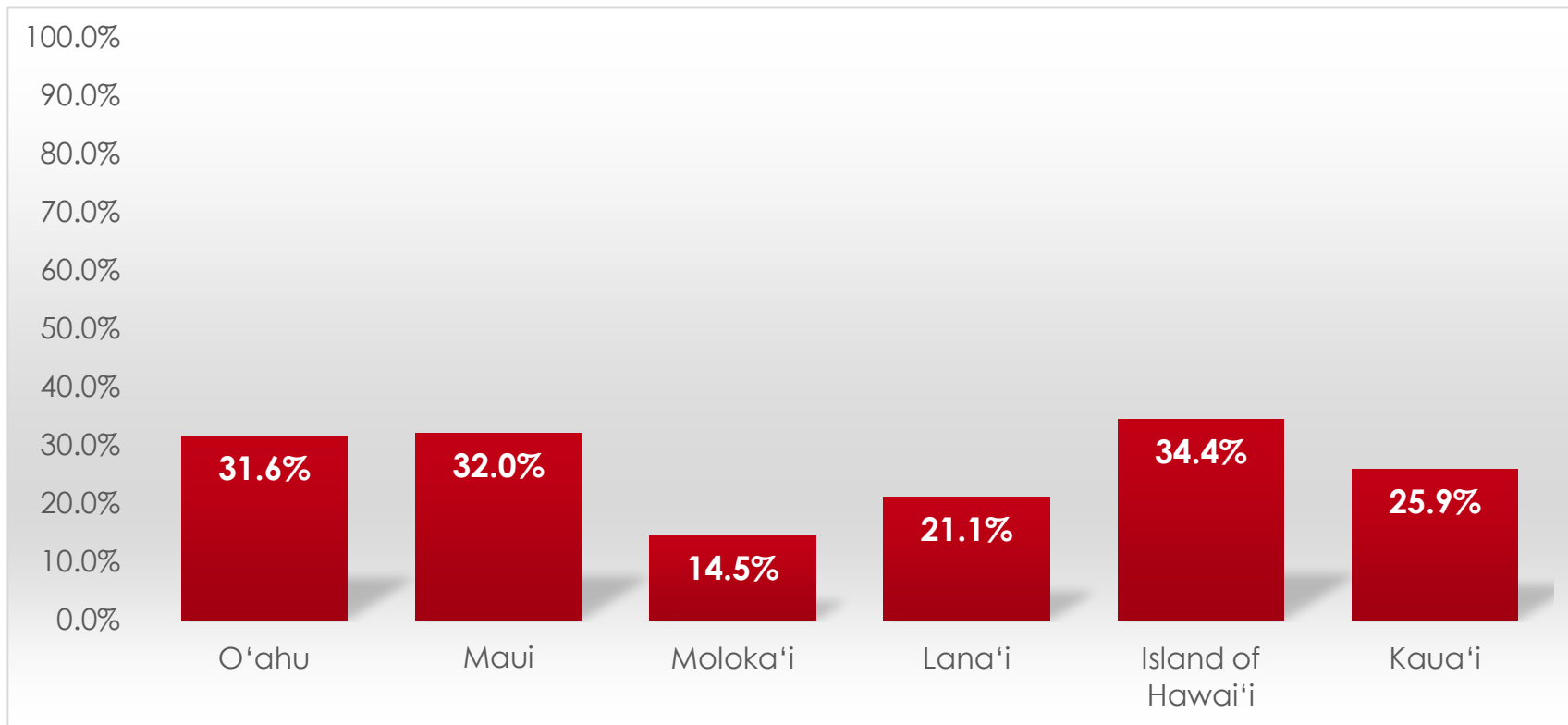
U.S. EAST

| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 87.5% | 82.6% |
| Visit friends/ relatives | 21.1% | 16.1% |
| Anniversary/ birthday | 20.7% | 16.0% |
| Business trip | 7.0% | 6.1% |
| Family gathering/ reunion | 6.1% | 5.2% |
| Convention, conference, seminar | 5.9% | 5.1% |
| Vacation home/ timeshare | 0.4% | 4.8% |
| Honeymoon | 6.0% | 4.5% |

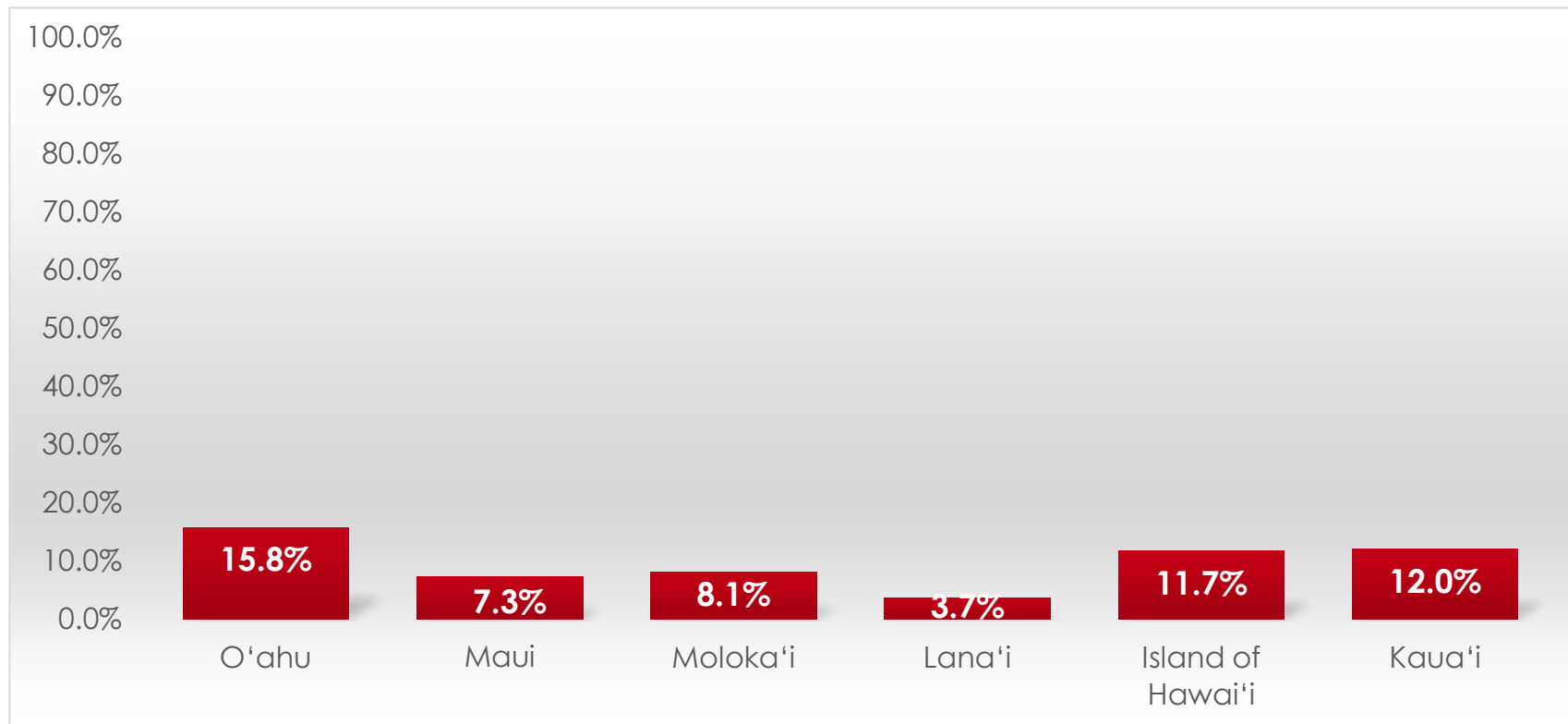
VACATION TRIP DESCRIPTION – U.S. EAST



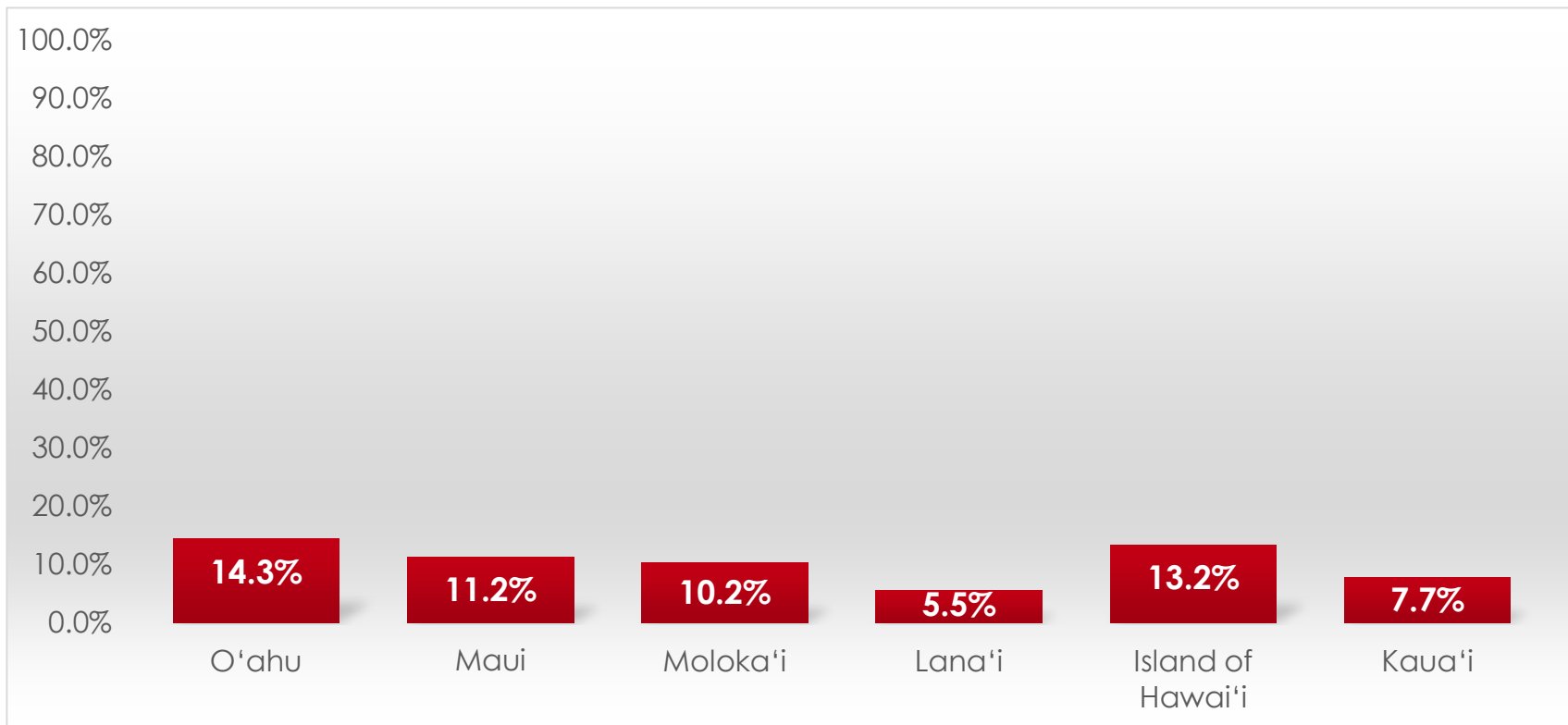
ADVERTISING AWARENESS – U.S. EAST



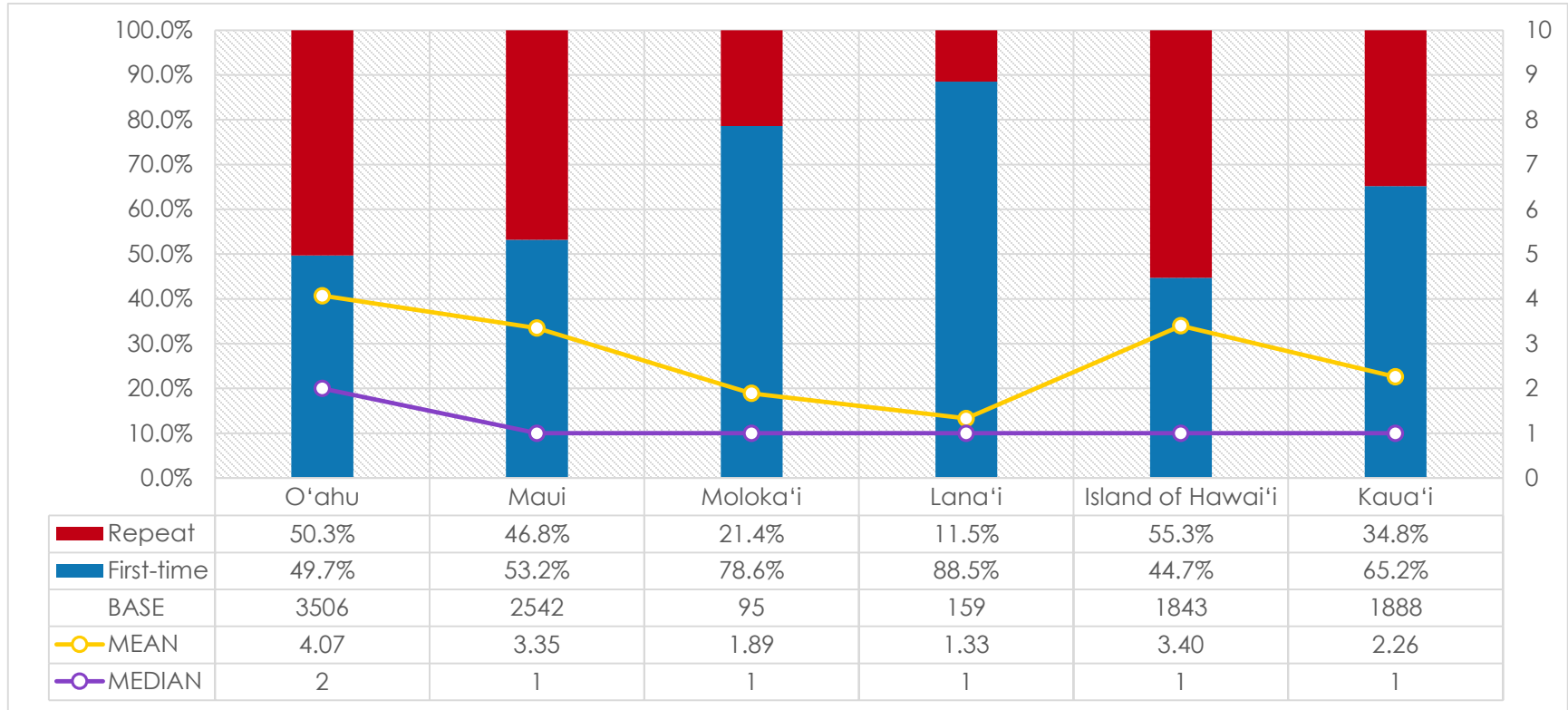
IMPACT OF LOCATION FILMING – U.S. EAST



IMPACT OF HAWAIIAN MUSIC – U.S. EAST



1ST TIME VS REPEAT VISITOR – U.S. EAST

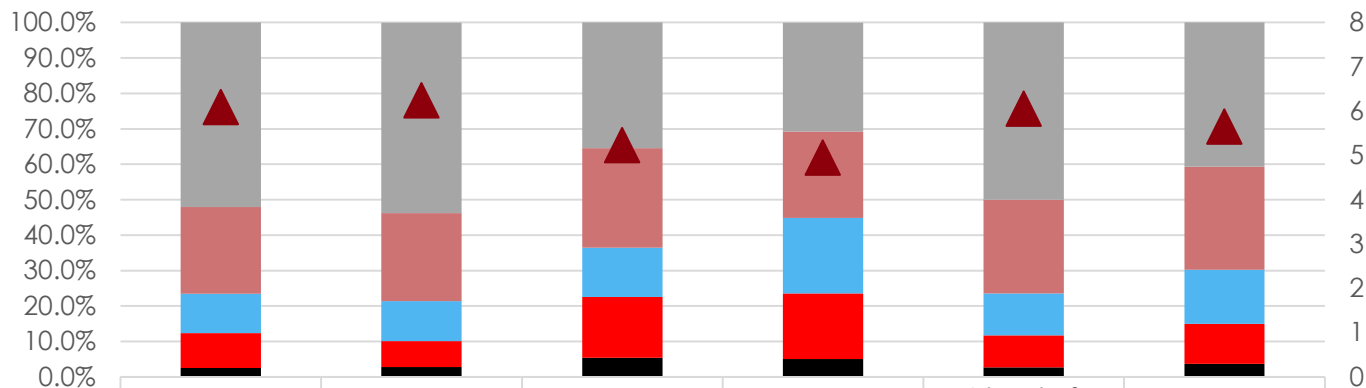


TRAVEL PARTY MEMBERS – U.S. EAST

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 62.9% | 60.9% | 61.0% |
| Other adult family | 25.5% | 24.6% | 26.5% |
| Child under 18 | 18.1% | 15.6% | 19.5% |
| Friends/ associates | 17.6% | 14.9% | 17.5% |
| Alone | 11.5% | 12.3% | 10.3% |
| Girlfriend/ boyfriend | 5.7% | 6.5% | 6.6% |
| Same-sex partner | .8% | 1.2% | 1.2% |

LIKELIHOOD OF RETURN VISIT – U.S. EAST

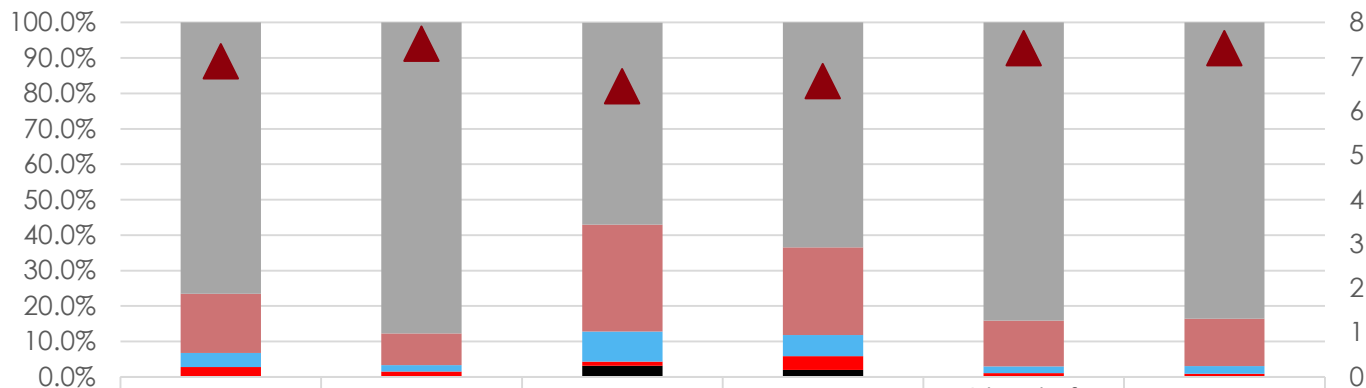
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 52.1% | 53.7% | 35.5% | 30.7% | 50.1% | 40.7% |
| ■ Somewhat likely (5-6) | 24.4% | 24.8% | 28.0% | 24.3% | 26.4% | 29.1% |
| ■ Somewhat unlikely (3-4) | 11.1% | 11.3% | 13.9% | 21.3% | 11.9% | 15.2% |
| ■ Very unlikely (1-2) | 9.9% | 7.3% | 17.2% | 18.5% | 9.0% | 11.3% |
| ■ Not sure | 2.5% | 2.8% | 5.4% | 5.1% | 2.7% | 3.7% |
| BASE | 3,483 | 2,522 | 93 | 156 | 1,826 | 1,869 |
| ▲ MEAN | 6.09 | 6.24 | 5.23 | 4.95 | 6.05 | 5.65 |

BRAND/DESTINATION ADVOCACY – U.S. EAST

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------|-------|-------|----------|--------|-------------------|--------|
| Very likely (7-8) | 76.5% | 87.7% | 56.9% | 63.5% | 84.1% | 83.7% |
| Somewhat likely (5-6) | 16.7% | 9.0% | 30.2% | 24.8% | 12.9% | 13.3% |
| Somewhat unlikely (3-4) | 4.0% | 1.8% | 8.5% | 5.9% | 1.9% | 2.2% |
| Very unlikely (1-2) | 2.6% | 1.4% | 1.1% | 3.9% | 0.9% | 0.7% |
| Not sure | 0.2% | 0.1% | 3.2% | 2.0% | 0.2% | 0.2% |
| BASE | 3,454 | 2,501 | 93 | 154 | 1,815 | 1,858 |
| MEAN | 7.12 | 7.52 | 6.56 | 6.67 | 7.42 | 7.42 |

ACTIVITIES – SIGHTSEEING – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.0% | 96.3% | 97.8% | 92.0% | 96.1% | 96.8% |
| On own (self-guided) | 75.3% | 83.0% | 53.0% | 29.0% | 83.2% | 74.7% |
| Helicopter/ airplane | 3.6% | 7.7% | 10.5% | 0.6% | 14.9% | 22.2% |
| Boat/ submarine/ whale | 17.1% | 39.3% | 13.9% | 30.3% | 26.5% | 29.4% |
| Visit towns | 46.2% | 57.6% | 44.5% | 34.3% | 58.7% | 55.8% |
| Limo/ van/ bus tour | 18.0% | 13.1% | 18.2% | 20.9% | 14.9% | 14.4% |
| Scenic views/ natural landmark | 63.3% | 66.8% | 55.2% | 52.0% | 72.5% | 71.1% |
| Movie/ TV/ film location | 10.7% | 0.8% | 1.1% | 0.0% | 2.1% | 8.5% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - U.S. EAST

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 97.4% | 96.5% |
| On own (self-guided) | 82.0% | 81.8% |
| Helicopter/ airplane | 13.2% | 12.1% |
| Boat/ submarine/ whale | 33.2% | 31.1% |
| Visit towns | 37.4% | 57.0% |
| Limo/ van/ bus tour | 19.9% | 16.4% |
| Scenic views/ natural landmark | 77.7% | 69.9% |
| Movie/ TV/ film location | 8.3% | 7.0% |

ACTIVITIES – RECREATION – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.3% | 96.9% | 79.6% | 82.8% | 96.2% | 92.5% |
| Beach/ sunbathing | 81.4% | 86.8% | 50.7% | 59.9% | 78.2% | 71.7% |
| Bodyboard/ Standup paddle board | 10.4% | 10.5% | 2.1% | 2.0% | 10.6% | 7.0% |
| Surfing | 7.2% | 6.9% | 1.0% | 0.0% | 3.1% | 4.4% |
| Canoeing/ kayak | 5.1% | 4.7% | 6.6% | 2.0% | 7.5% | 10.5% |
| Swim- ocean | 59.8% | 68.4% | 32.3% | 42.1% | 62.3% | 50.1% |
| Snorkel | 29.1% | 48.8% | 26.8% | 38.8% | 50.1% | 31.9% |
| Windsurf/ Kitesurf | 0.3% | 0.4% | 0.0% | 0.0% | 0.2% | 0.0% |
| Jet ski/ Parasail | 1.9% | 2.5% | 0.0% | 0.0% | 1.0% | 0.1% |
| Scuba | 2.1% | 3.5% | 3.2% | 3.3% | 4.2% | 1.8% |
| Fishing | 2.1% | 2.3% | 0.0% | 4.0% | 4.4% | 2.1% |
| Golf | 3.4% | 8.5% | 0.0% | 6.0% | 7.4% | 5.8% |

STATEWIDE - ACTIVITIES – RECREATION – U.S. EAST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 96.0% | 96.2% |
| Beach/ sunbathing | 84.8% | 83.8% |
| Bodyboard/ Standup paddle board | 13.8% | 11.3% |
| Surfing | 7.8% | 6.5% |
| Canoeing/ kayak | 9.1% | 7.6% |
| Swim- ocean | NA | 65.1% |
| Snorkel | NA | 42.9% |
| Windsurf/ Kitesurf | 0.4% | 0.3% |
| Jet ski/ Parasail | 3.0% | 1.8% |
| Scuba | 4.0% | 3.2% |
| Fishing | 2.9% | 3.1% |
| Golf | 6.7% | 6.7% |

ACTIVITIES – RECREATION – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.3% | 96.9% | 79.6% | 82.8% | 96.2% | 92.5% |
| Run/ Jog/ Fitness walk | 26.0% | 29.2% | 13.0% | 12.5% | 23.7% | 23.5% |
| Spa | 7.1% | 11.9% | 1.0% | 8.5% | 8.2% | 6.7% |
| Hiking/Backpack/Camp | 34.6% | 29.7% | 25.9% | 12.5% | 33.8% | 33.9% |
| Agritourism | 14.9% | 13.1% | 15.2% | 8.6% | 19.3% | 13.9% |
| Sport event/ tournament | 2.9% | 1.6% | 3.2% | 0.0% | 2.0% | 0.3% |
| Park/ botanical garden | 39.9% | 36.9% | 25.8% | 17.6% | 51.8% | 43.0% |
| Waterpark | 1.6% | 0.9% | 0.0% | 0.0% | 0.8% | 0.4% |
| Mountain tube/ waterfall rappel | 0.6% | 0.8% | 0.0% | 0.0% | 0.8% | 4.6% |
| Zip-lining | 2.6% | 6.7% | 0.0% | 1.3% | 5.3% | 6.9% |
| Skydiving | 0.8% | 0.2% | 0.0% | 0.0% | 0.4% | 0.2% |
| All terrain vehicle (ATV) | 2.9% | 1.5% | 1.0% | 5.3% | 3.6% | 5.7% |
| Horseback riding | 2.1% | 1.6% | 3.3% | 2.6% | 2.7% | 1.5% |

STATEWIDE - ACTIVITIES – RECREATION – U.S. EAST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 96.0% | 96.2% |
| Run/ Jog/ Fitness walk | 36.3% | 28.5% |
| Spa | 11.6% | 9.9% |
| Hiking/Backpack/Camp | 33.8% | 36.0% |
| Agritourism | 13.1% | 17.1% |
| Sport event/ tournament | 2.3% | 2.2% |
| Park/ botanical garden | 47.6% | 45.3% |
| Waterpark | NA | 1.2% |
| Mountain tube/ waterfall rappel | NA | 1.7% |
| Zip-lining | NA | 5.9% |
| Skydiving | NA | 0.5% |
| All terrain vehicle (ATV) | NA | 3.8% |
| Horseback riding | NA | 2.3% |

ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.7% | 97.7% | 86.1% | 74.9% | 97.9% | 93.6% |
| Lunch/ sunset/ dinner/ evening cruise | 21.7% | 26.7% | 11.7% | 30.2% | 18.8% | 25.5% |
| Live music/ stage show | 34.4% | 36.3% | 20.4% | 5.9% | 29.8% | 26.8% |
| Nightclub/ dancing/ bar/ karaoke | 11.7% | 7.0% | 3.3% | 2.0% | 8.8% | 5.9% |
| Fine dining | 50.6% | 61.1% | 17.3% | 25.7% | 50.7% | 46.5% |
| Family restaurant | 55.7% | 55.8% | 44.3% | 14.5% | 61.6% | 49.2% |
| Fast food | 41.9% | 28.6% | 18.2% | 2.0% | 31.7% | 23.6% |
| Food truck | 36.7% | 23.6% | 14.1% | 1.9% | 17.1% | 29.8% |
| Café/ coffee house | 40.8% | 39.3% | 33.4% | 15.8% | 45.5% | 37.1% |
| Ethnic dining | 36.7% | 26.9% | 11.8% | 5.2% | 31.7% | 26.0% |
| Prepared own meal | 31.9% | 42.4% | 40.2% | 13.8% | 47.5% | 39.3% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 97.9% | 97.7% |
| Lunch/ sunset/ dinner/ evening cruise | 33.2% | 26.1% |
| Live music/ stage show | 39.6% | 37.3% |
| Nightclub/ dancing/ bar/ karaoke | 10.6% | 10.0% |
| Fine dining | 58.2% | 55.7% |
| Family restaurant | 65.8% | 58.3% |
| Fast food | 34.9% | 35.7% |
| Food truck | NA | 31.2% |
| Café/ coffee house | 44.8% | 43.9% |
| Ethnic dining | 36.1% | 34.0% |
| Prepared own meal | 40.6% | 43.6% |

ACTIVITIES – SHOPPING – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.5% | 95.9% | 75.4% | 64.5% | 95.9% | 91.2% |
| Mall/ department store | 52.4% | 39.9% | 5.2% | 9.0% | 29.8% | 20.8% |
| Designer boutique | 17.0% | 19.5% | 1.1% | 4.6% | 14.0% | 15.4% |
| Hotel/ resort store | 41.2% | 41.5% | 6.4% | 16.6% | 33.4% | 23.9% |
| Swap meet/ flea market | 18.3% | 12.3% | 10.7% | 1.3% | 14.3% | 5.9% |
| Discount/ outlet store | 18.0% | 18.4% | 7.4% | 5.8% | 11.7% | 12.0% |
| Supermarket | 45.8% | 61.2% | 40.0% | 9.2% | 62.9% | 52.3% |
| Farmer's market | 18.7% | 24.6% | 31.3% | 5.9% | 44.1% | 31.0% |
| Convenience store | 54.0% | 43.3% | 21.5% | 12.5% | 41.4% | 34.6% |
| Duty free store | 6.5% | 3.5% | 1.0% | 3.3% | 2.7% | 1.3% |
| Local shop/ artisan | 55.6% | 67.4% | 50.6% | 31.5% | 68.4% | 71.0% |

STATEWIDE - ACTIVITIES – SHOPPING – U.S. EAST

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 95.9% | 95.9% |
| Mall/ department store | 44.3% | 43.1% |
| Designer boutique | 23.1% | 18.6% |
| Hotel/ resort store | 39.5% | 39.2% |
| Swap meet/ flea market | 18.2% | 15.6% |
| Discount/ outlet store | 19.1% | 17.8% |
| Supermarket | 51.4% | 59.2% |
| Farmer's market | 28.2% | 31.2% |
| Convenience store | 44.6% | 48.1% |
| Duty free store | 4.1% | 4.6% |
| Local shop/ artisan | 67.6% | 67.0% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---|-------|-------|----------|--------|------------------|--------|
| TOTAL | 81.1% | 69.5% | 74.3% | 48.6% | 73.4% | 64.5% |
| Historic military site | 55.4% | 4.9% | 6.3% | 4.6% | 14.1% | 6.7% |
| Other historical site | 27.2% | 22.4% | 48.6% | 22.2% | 40.5% | 26.8% |
| Museum/ art gallery | 16.5% | 16.3% | 11.8% | 7.3% | 18.8% | 13.2% |
| Luau/ Polynesian show/ hula show | 39.2% | 40.8% | 15.9% | 14.3% | 31.8% | 30.6% |
| Lesson- ex. ukulele, hula, canoe, lei making | 8.8% | 6.8% | 7.6% | 0.7% | 7.3% | 5.3% |
| Play/ concert/ theatre | 5.8% | 4.5% | 2.1% | 0.7% | 3.9% | 1.8% |
| Art/ craft fair | 8.0% | 15.0% | 9.7% | 3.3% | 12.9% | 14.1% |
| Festival event | 5.2% | 2.9% | 10.8% | 7.3% | 5.4% | 3.3% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 81.3% | 77.1% |
| Historic military site | 42.9% | 28.3% |
| Other historical site | 34.7% | 31.4% |
| Museum/ art gallery | 21.9% | 18.3% |
| Luau/ Polynesian show/ hula show | 47.6% | 42.0% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.3% | 8.5% |
| Play/ concert/ theatre | 4.7% | 5.1% |
| Art/ craft fair | 12.8% | 13.5% |
| Festival event | 9.8% | 5.3% |

ACTIVITIES – TRANSPORTATION – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 90.1% | 95.3% | 81.8% | 69.6% | 93.7% | 94.8% |
| Airport shuttle | 23.2% | 17.2% | 6.5% | 12.6% | 16.6% | 13.1% |
| Trolley | 4.4% | 1.7% | 1.0% | 1.9% | 2.9% | 2.0% |
| Public bus | 10.0% | 2.3% | 4.3% | 2.0% | 2.2% | 1.6% |
| Tour bus/ tour van | 19.2% | 13.2% | 29.8% | 27.5% | 16.0% | 20.1% |
| Taxi/ limo | 16.9% | 8.4% | 7.6% | 14.4% | 8.8% | 5.0% |
| Rental car | 58.0% | 83.3% | 45.5% | 14.6% | 80.8% | 73.6% |
| Ride share | 23.5% | 10.3% | 3.1% | 4.5% | 7.6% | 4.2% |
| Bicycle rental | 1.5% | 1.7% | 1.0% | 0.0% | 1.2% | 3.7% |

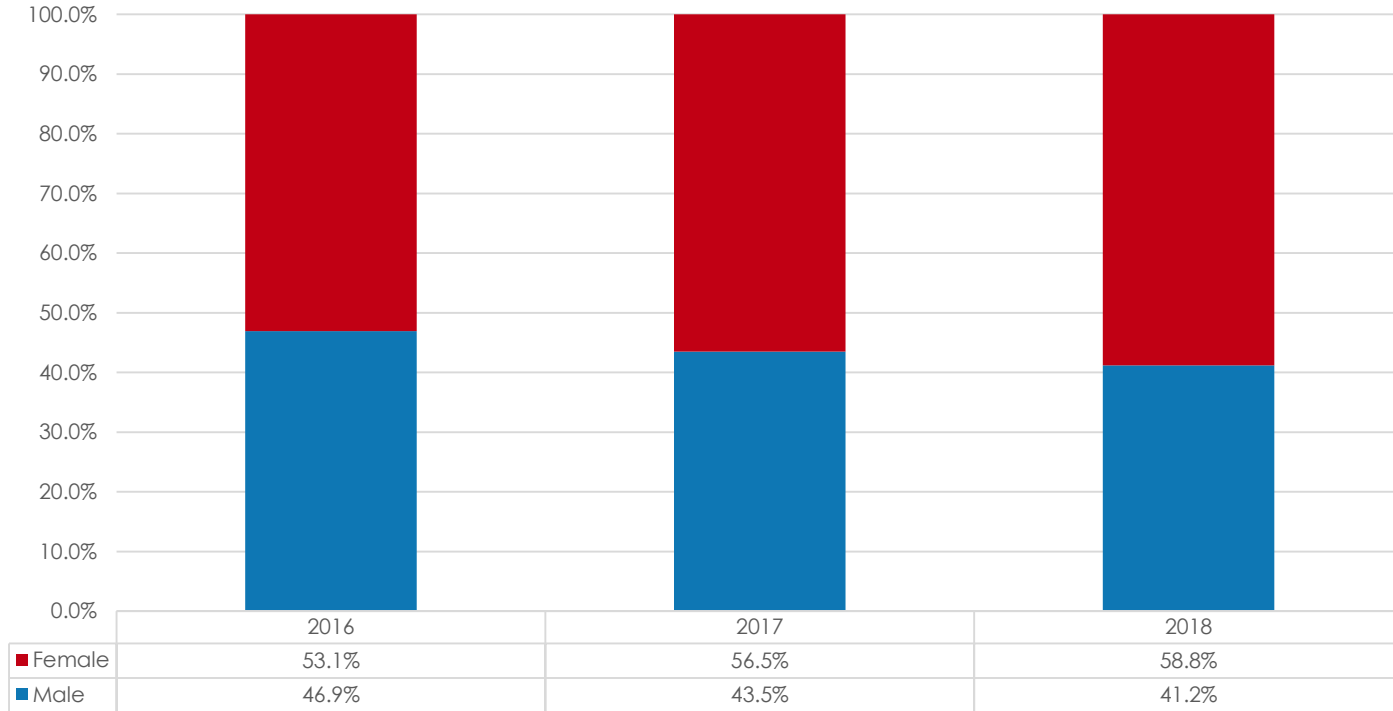
STATEWIDE - ACTIVITIES – TRANSPORTATION – U.S. EAST

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 95.0% | 92.4% |
| Airport shuttle | 26.3% | 20.2% |
| Trolley | 4.5% | 3.4% |
| Public bus | 7.5% | 5.7% |
| Tour bus/ tour van | 20.6% | 18.0% |
| Taxi/ limo | 20.1% | 12.4% |
| Rental car | 75.3% | 74.2% |
| Ride share | NA | 14.9% |
| Bicycle rental | NA | 2.2% |

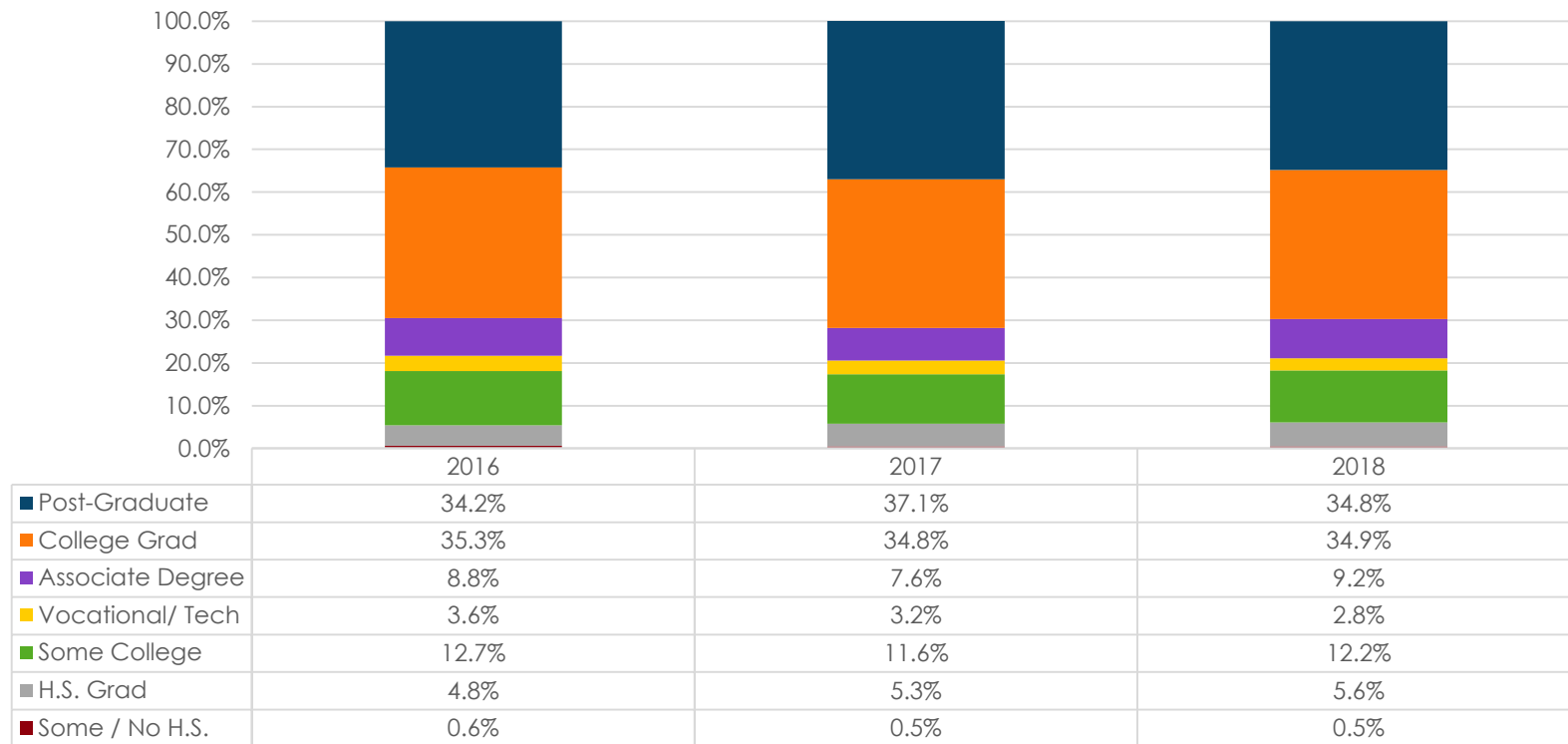
ACTIVITIES – OTHER – U.S. EAST

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|------------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 34.6% | 15.3% | 19.4% | 11.8% | 22.4% | 12.6% |
| Visit friends/ family | 34.0% | 14.8% | 16.3% | 6.5% | 21.7% | 11.8% |
| Volunteer- non-profit | 1.0% | 0.8% | 4.3% | 5.3% | 1.2% | 1.3% |

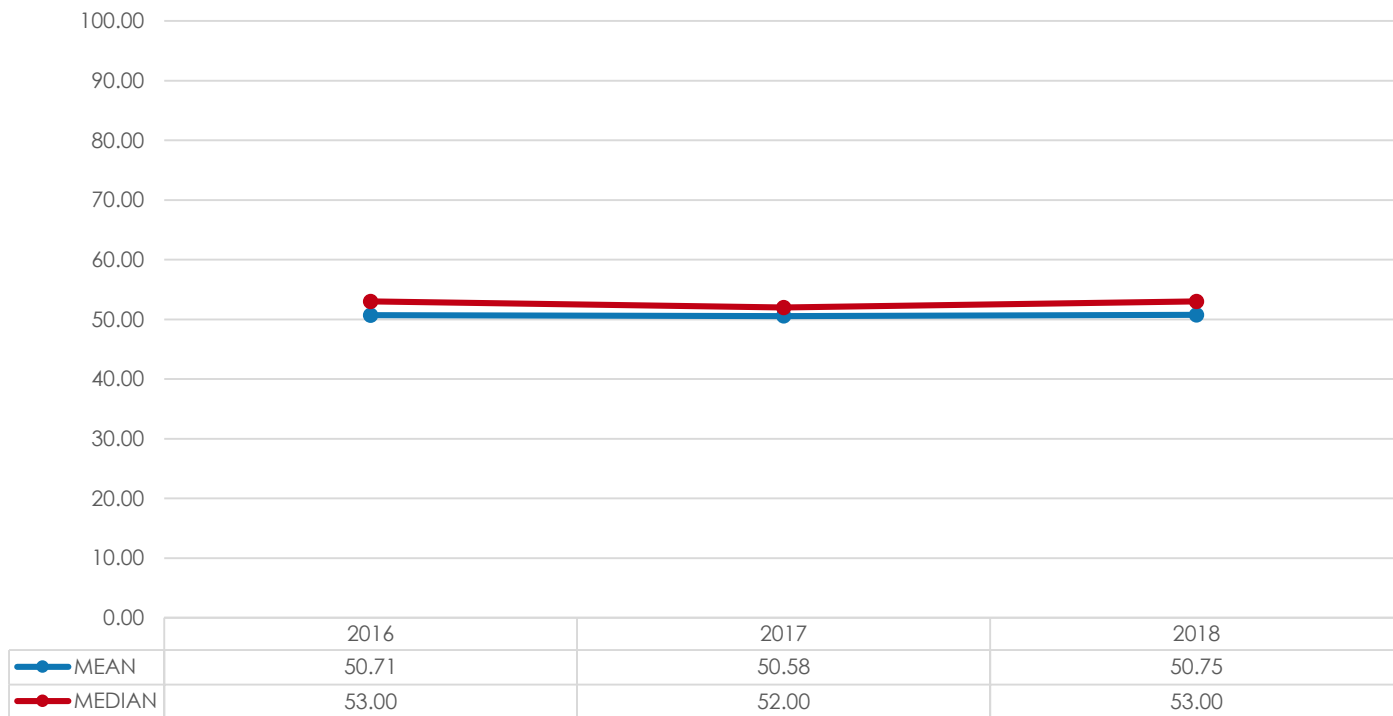
VISITOR PROFILE – GENDER – U.S. EAST



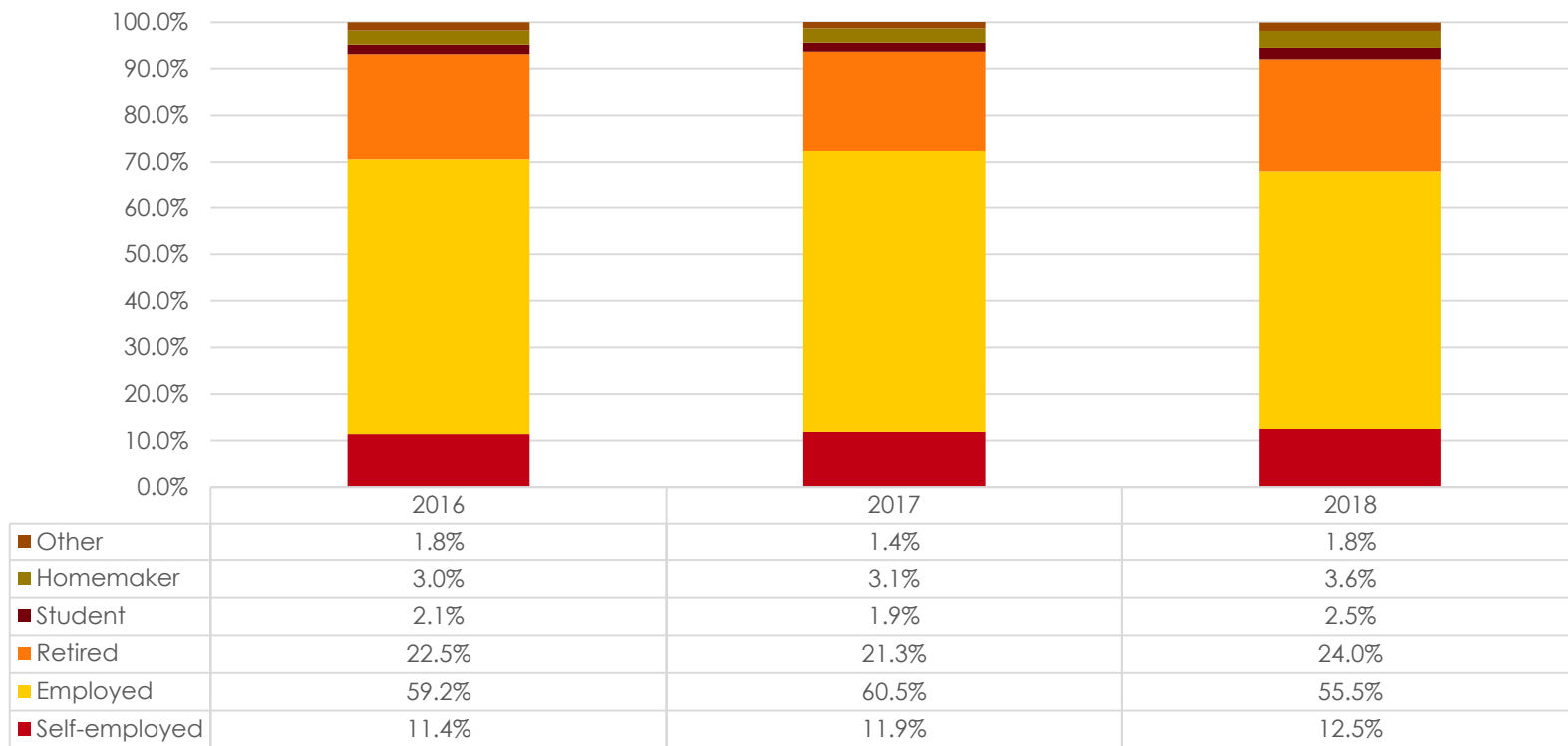
VISITOR PROFILE – EDUCATION – U.S. EAST



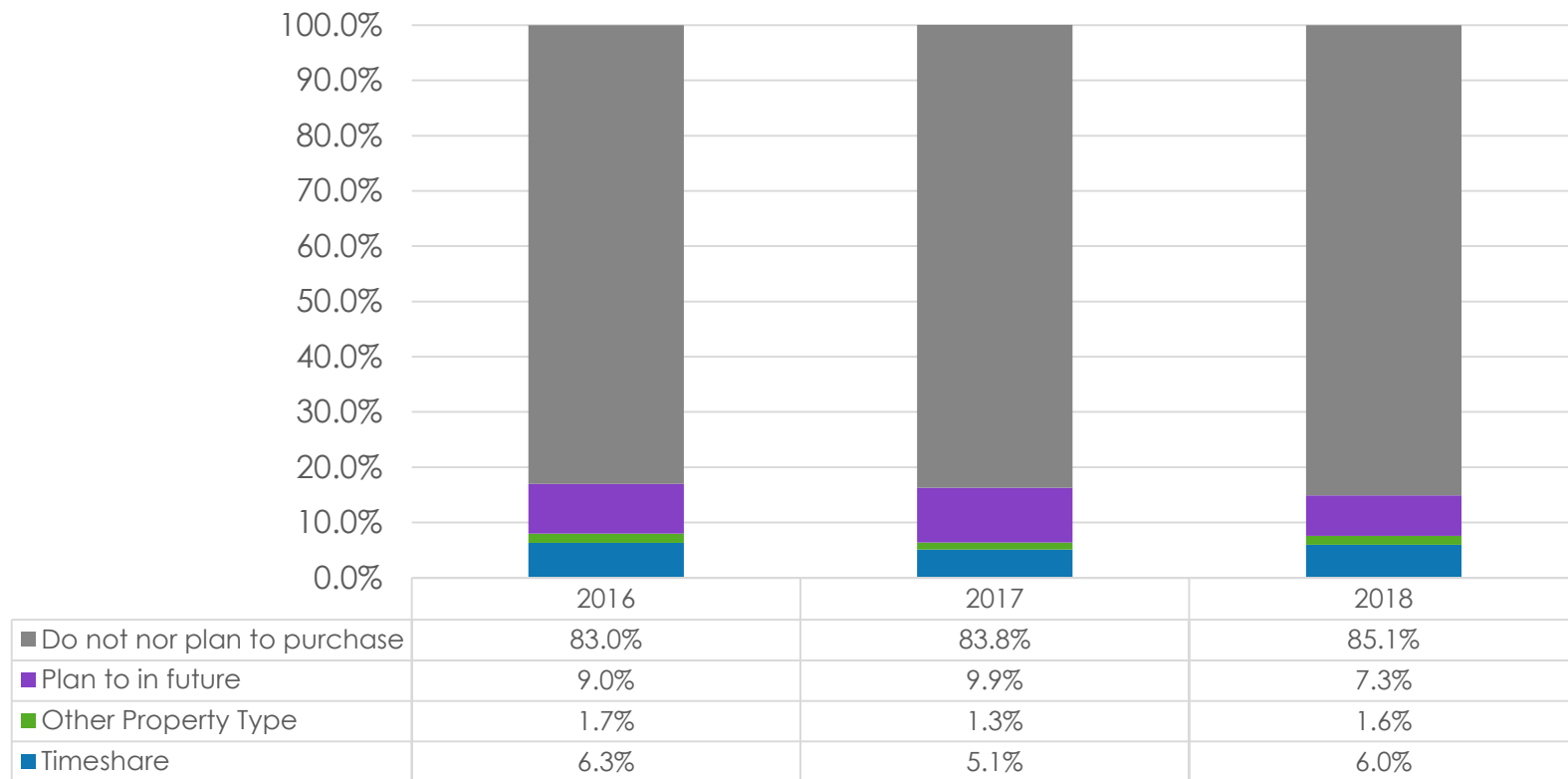
VISITOR PROFILE – AGE – U.S. EAST



VISITOR PROFILE – EMPLOYMENT STATUS – U.S. EAST



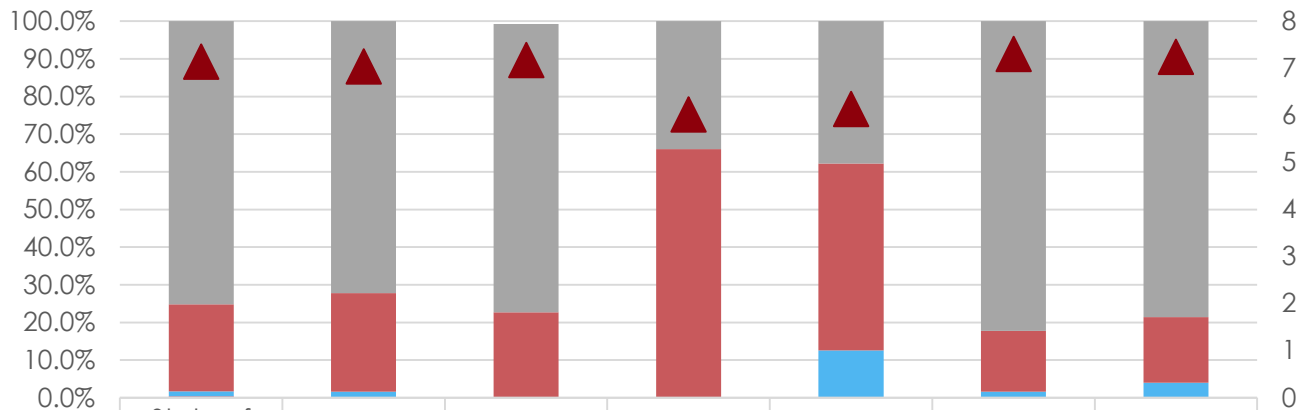
VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. EAST



SECTION – JAPAN

OVERALL SATISFACTION – MOST RECENT VISIT – JAPAN

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



| | State of Hawai'i Overall | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------------|--------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Extremely satisfied (7-8) | 75.3% | 72.2% | 76.6% | 34.0% | 37.8% | 82.2% | 78.7% |
| ■ Somewhat satisfied (5-6) | 23.1% | 26.2% | 22.7% | 66.0% | 49.6% | 16.2% | 17.4% |
| ■ Somewhat dissatisfied (3-4) | 1.4% | 1.4% | 0.0% | 0.0% | 12.6% | 1.4% | 4.0% |
| ■ Not at all satisfied (1-2) | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% |
| BASE | 5,435 | 4,648 | 158 | 3 | 8 | 1,202 | 51 |
| ▲ MEAN | 7.14 | 7.04 | 7.17 | 6.02 | 6.13 | 7.30 | 7.24 |

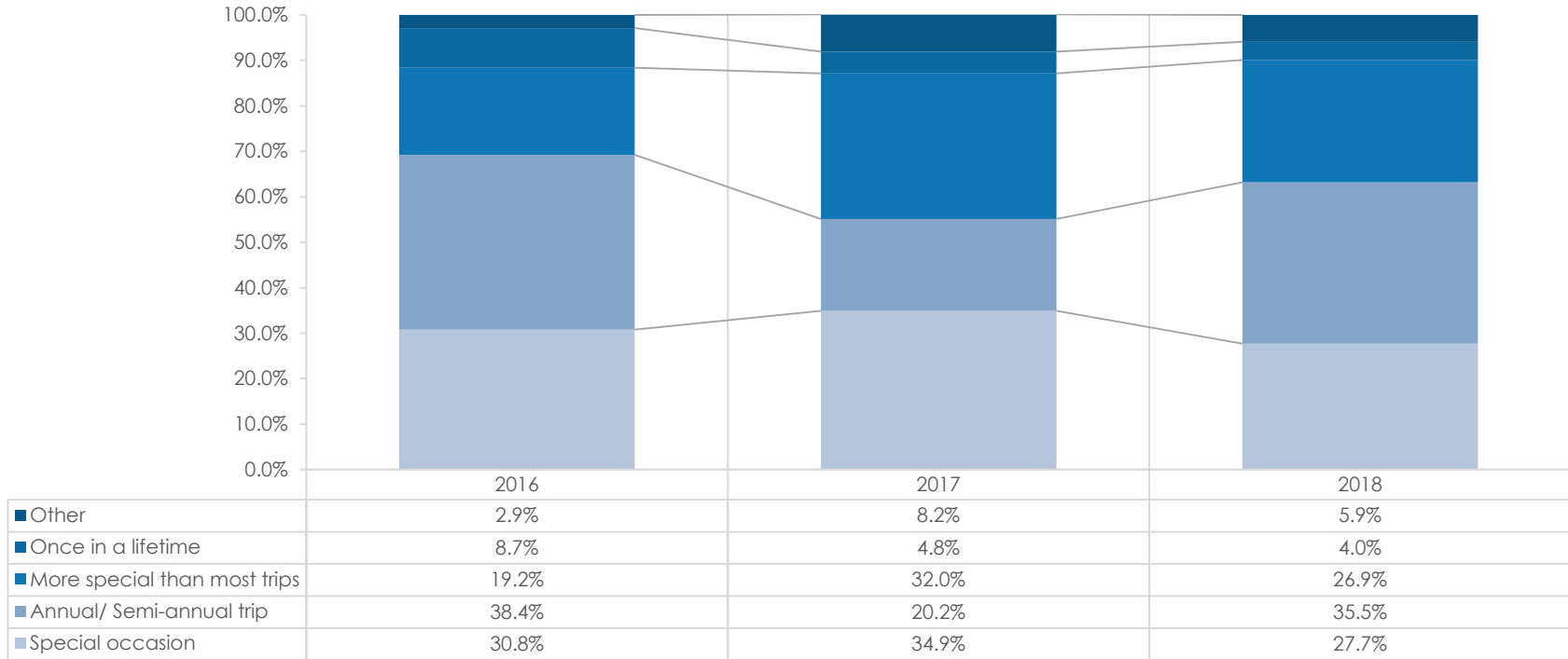
PRIMARY TRIP PURPOSE JAPAN

| | 2017 | 2018 |
|-----------------------------|-------|-------|
| Vacation | 63.5% | 65.4% |
| Honeymoon | 14.3% | 10.2% |
| Attend wedding/ vow renewal | 5.9% | 4.5% |
| Anniversary/ birthday | 2.0% | 3.6% |
| Get married | 2.3% | 2.6% |
| Business trip | 1.8% | 2.4% |
| Vacation home/ timeshare | 0.0% | 1.9% |
| Shopping | 2.5% | 1.6% |
| Visit friends or relatives | 1.4% | 1.2% |

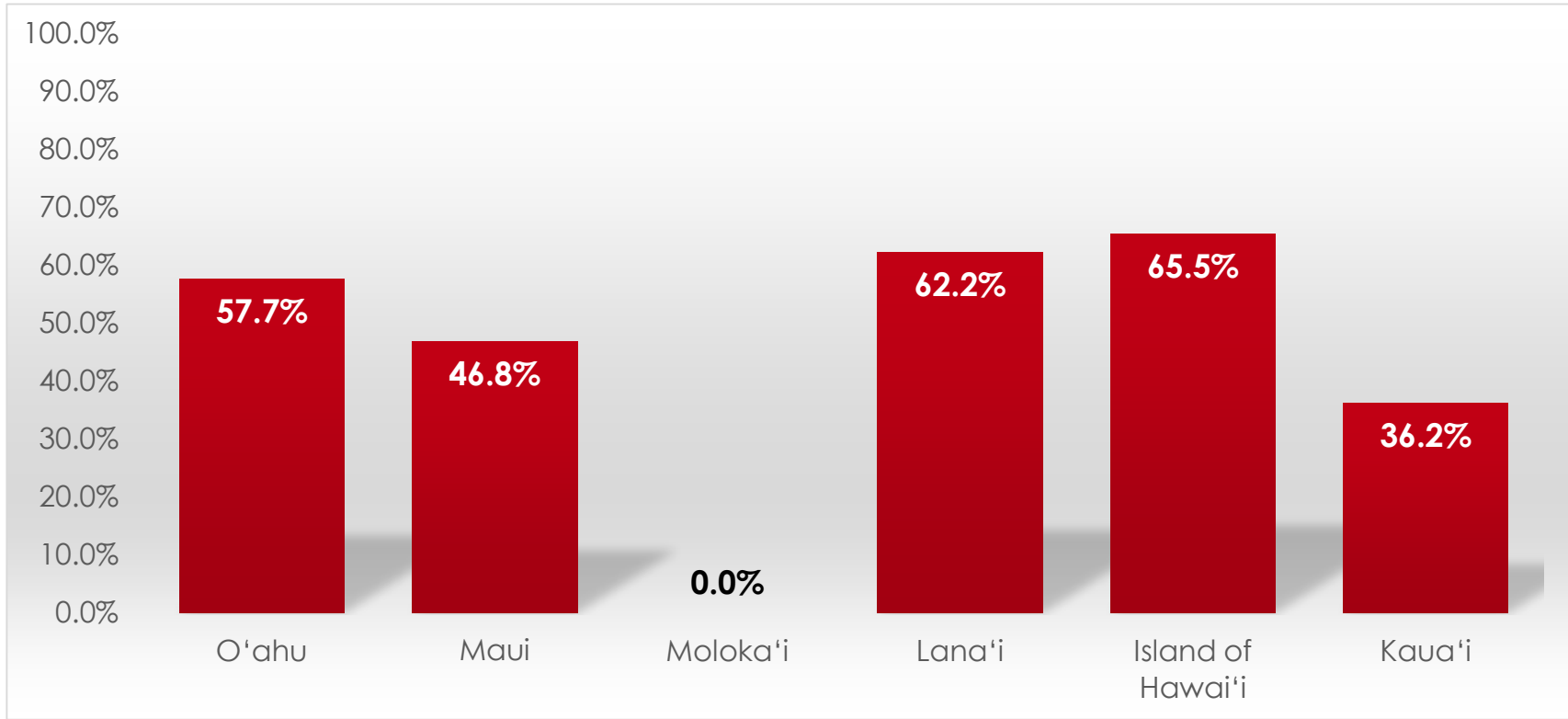
SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE JAPAN

| | 2017 | 2018 |
|-----------------------------|-------|-------|
| Vacation | 90.9% | 86.0% |
| Shopping/ fashion | 38.6% | 26.3% |
| Honeymoon | 17.2% | 12.9% |
| Anniversary/ birthday | 8.8% | 7.2% |
| Attend wedding/ vow renewal | 8.0% | 5.2% |
| Vacation home/ timeshare | 0.1% | 4.8% |
| Visit friends/ relatives | 6.0% | 4.7% |
| Family gathering/ reunion | 6.2% | 4.4% |
| Get married | 3.6% | 3.5% |
| Business trip | 3.5% | 3.3% |

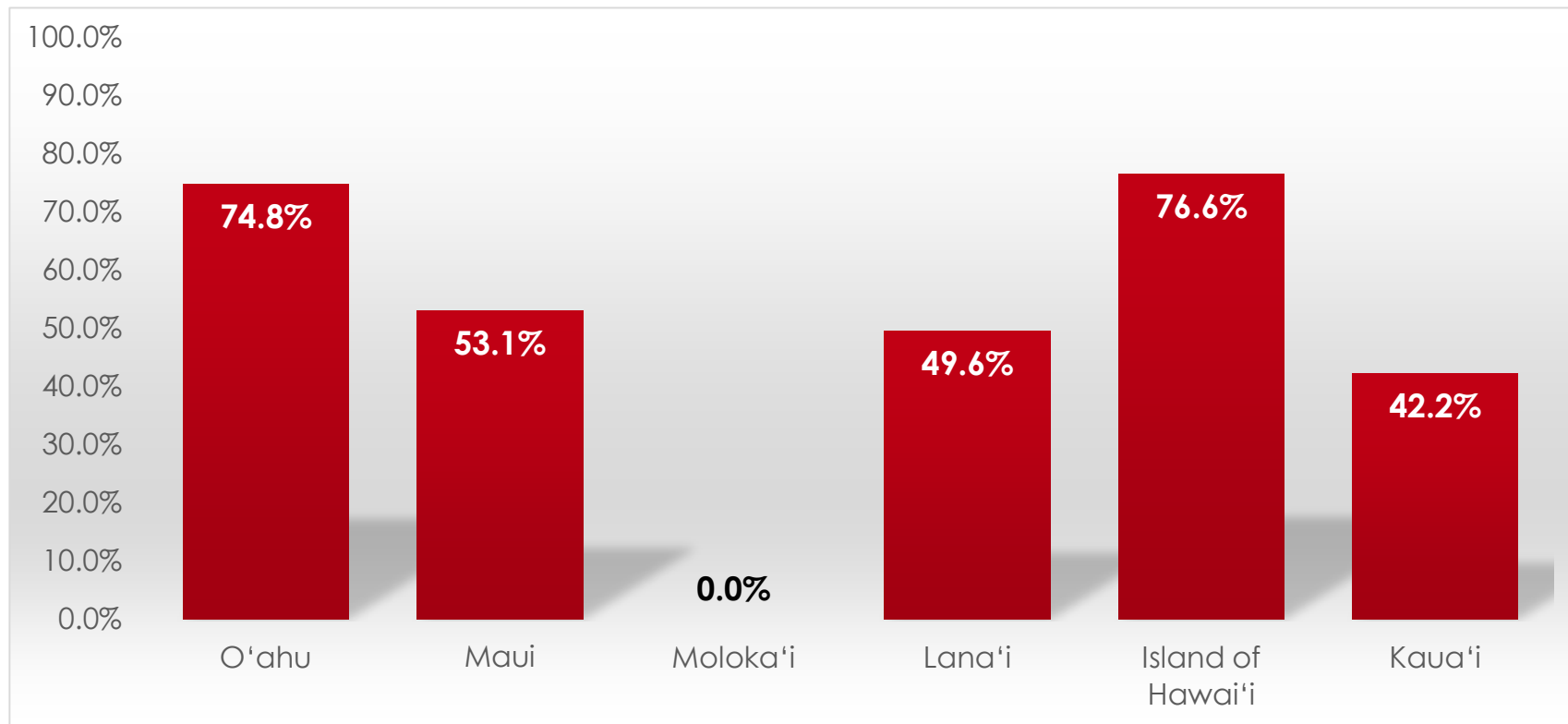
VACATION TRIP DESCRIPTION – JAPAN



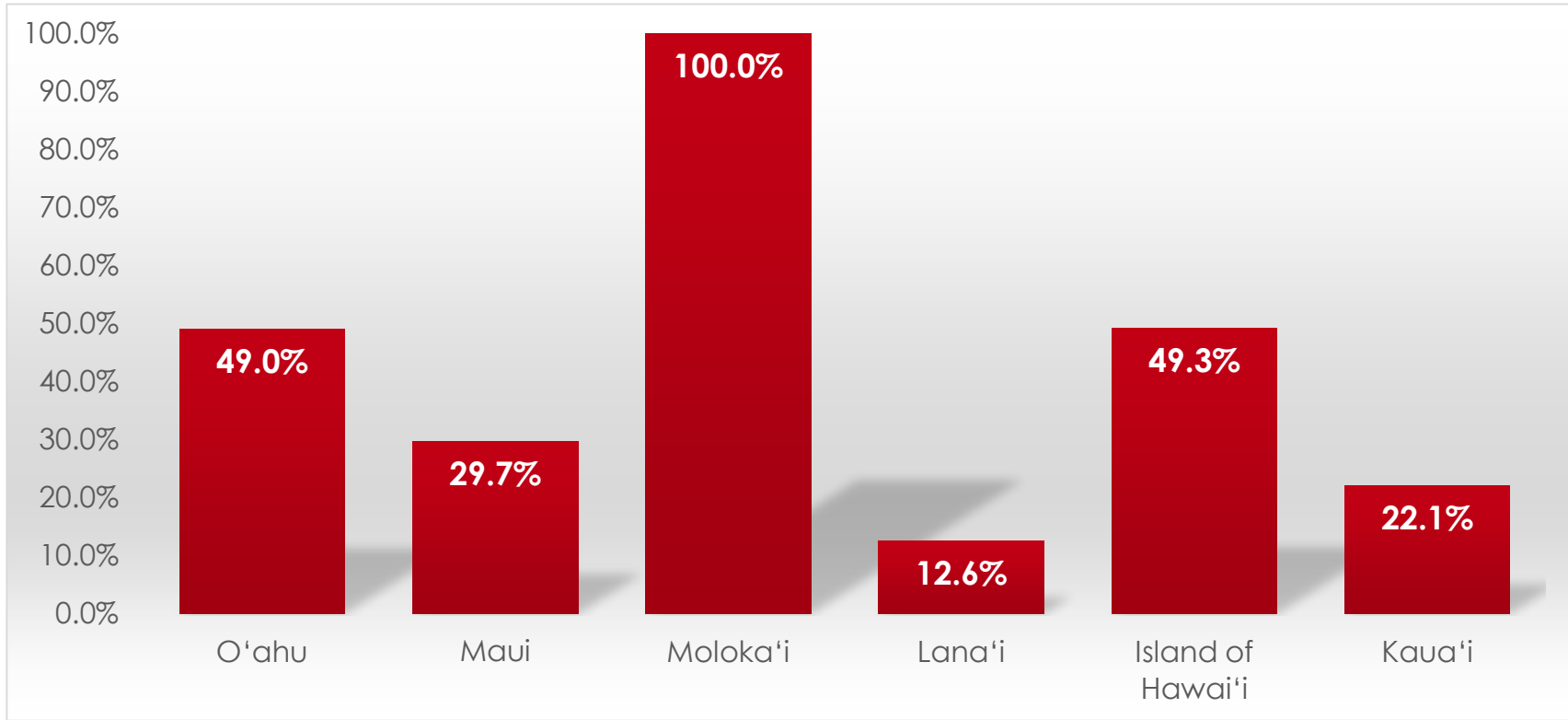
ADVERTISING AWARENESS – JAPAN



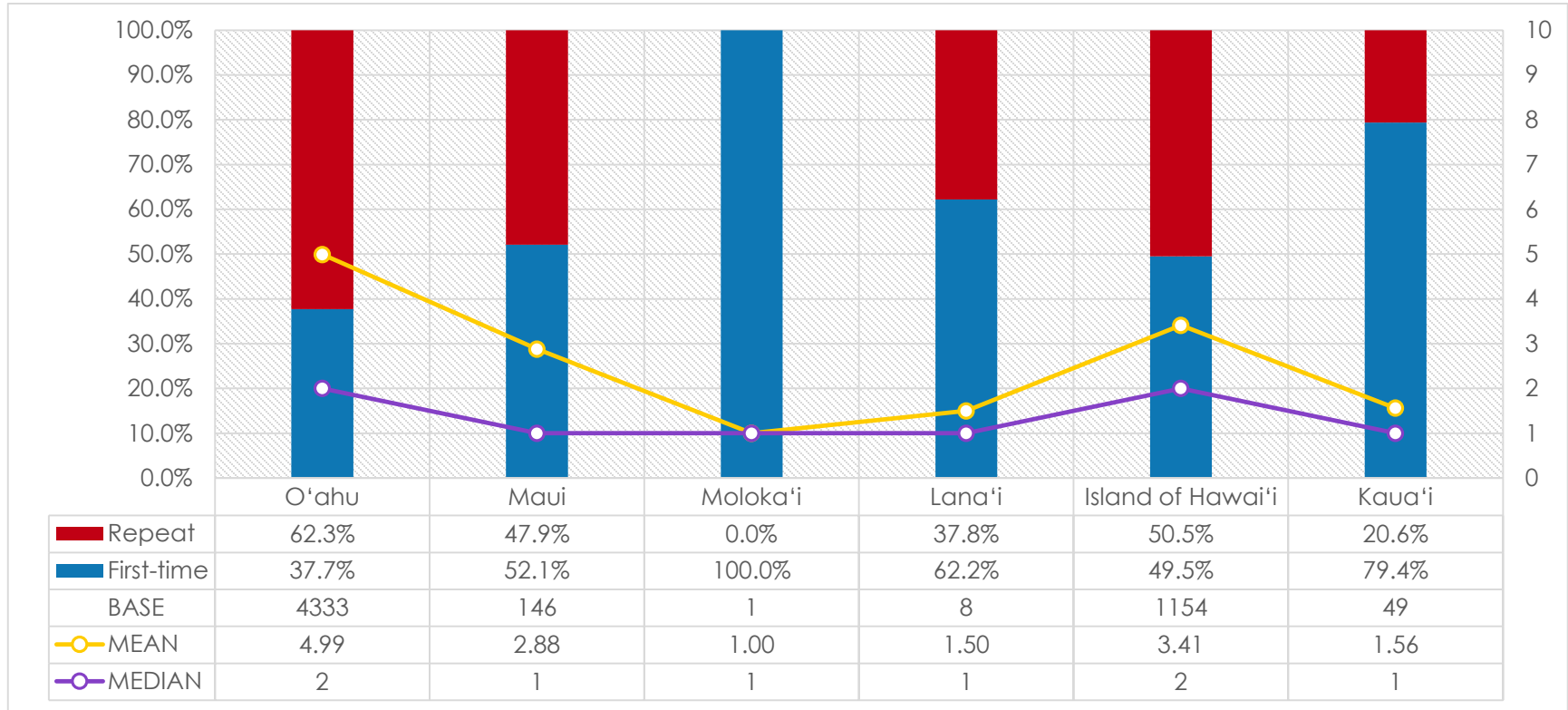
IMPACT OF LOCATION FILMING – JAPAN



IMPACT OF HAWAIIAN MUSIC – JAPAN



1ST TIME VS REPEAT VISITOR – JAPAN

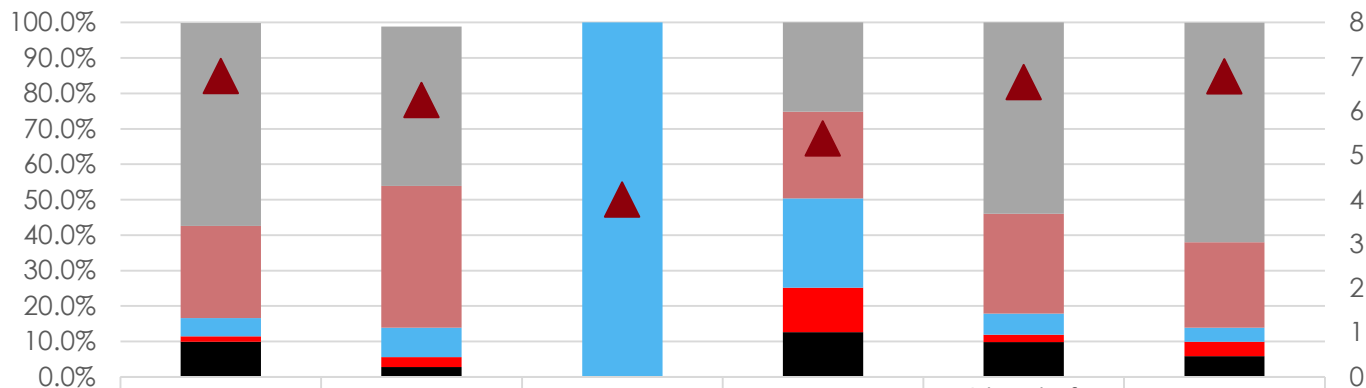


TRAVEL PARTY MEMBERS – JAPAN

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 65.0% | 51.9% | 50.6% |
| Other adult family | 31.5% | 26.2% | 23.8% |
| Child under 18 | 17.7% | 15.0% | 15.9% |
| Friends/ associates | 17.4% | 21.7% | 21.9% |
| Alone | 4.9% | 7.5% | 7.1% |
| Girlfriend/ boyfriend | 2.5% | 3.8% | 6.9% |
| Same-sex partner | .2% | .4% | 0.3% |

LIKELIHOOD OF RETURN VISIT – JAPAN

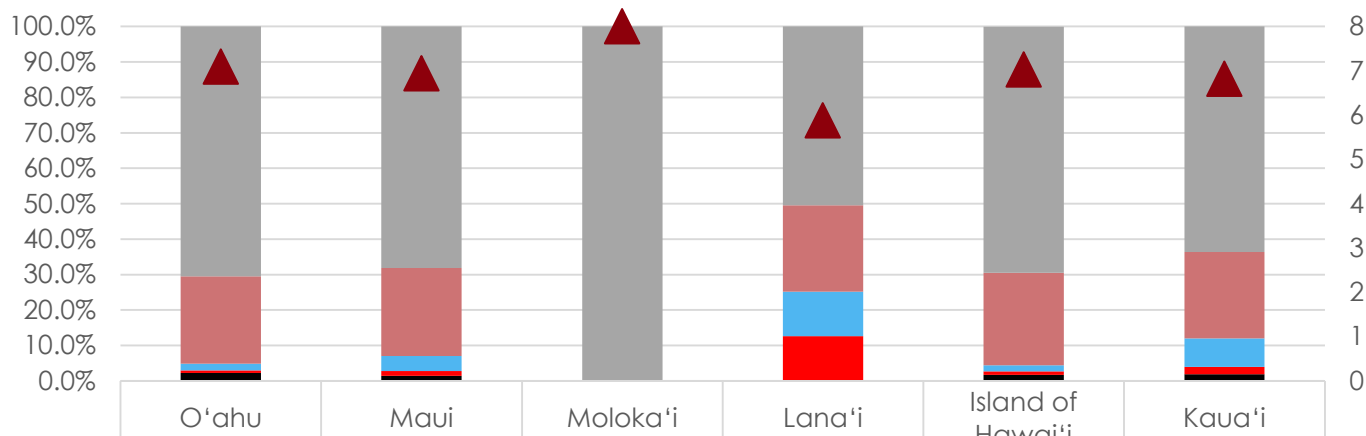
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 57.2% | 44.9% | 0.0% | 37.8% | 54.0% | 61.9% |
| ■ Somewhat likely (5-6) | 26.0% | 40.0% | 0.0% | 24.4% | 28.1% | 24.1% |
| ■ Somewhat unlikely (3-4) | 5.1% | 8.3% | 100.0% | 25.2% | 6.0% | 4.0% |
| ■ Very unlikely (1-2) | 1.6% | 2.8% | 0.0% | 12.6% | 2.1% | 4.0% |
| ■ Not sure | 9.9% | 2.8% | 0.0% | 12.6% | 9.8% | 5.9% |
| BASE | 4,325 | 145 | 1 | 8 | 1,152 | 49 |
| ▲ MEAN | 6.79 | 6.25 | 4.00 | 5.38 | 6.65 | 6.78 |

BRAND/DESTINATION ADVOCACY – JAPAN

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 70.5% | 68.2% | 100.0% | 50.4% | 69.4% | 63.6% |
| ■ Somewhat likely (5-6) | 24.6% | 24.9% | 0.0% | 24.4% | 26.1% | 24.4% |
| ■ Somewhat unlikely (3-4) | 1.9% | 4.2% | 0.0% | 12.6% | 1.7% | 8.0% |
| ■ Very unlikely (1-2) | 0.7% | 1.4% | 0.0% | 12.6% | 1.0% | 2.1% |
| ■ Not sure | 2.3% | 1.4% | 0.0% | 0.0% | 1.7% | 1.9% |
| BASE | 4,318 | 145 | 1 | 8 | 1,152 | 49 |
| ▲ MEAN | 7.09 | 6.94 | 8.00 | 5.88 | 7.03 | 6.82 |

ACTIVITIES – SIGHTSEEING – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.1% | 93.7% | 100.0% | 87.4% | 96.5% | 97.9% |
| On own (self-guided) | 67.5% | 68.9% | 100.0% | 62.2% | 68.0% | 51.4% |
| Helicopter/ airplane | 1.6% | 3.4% | 0.0% | 0.0% | 3.7% | 6.2% |
| Boat/ submarine/ whale | 10.1% | 14.4% | 0.0% | 0.0% | 5.8% | 6.2% |
| Visit towns | 30.8% | 37.6% | 0.0% | 25.2% | 28.3% | 26.8% |
| Limo/ van/ bus tour | 17.7% | 15.1% | 0.0% | 0.0% | 25.2% | 34.5% |
| Scenic views/ natural landmark | 20.3% | 29.5% | 0.0% | 0.0% | 30.4% | 41.0% |
| Movie/ TV/ film location | 4.4% | 2.1% | 0.0% | 0.0% | 2.0% | 10.3% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - JAPAN

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 86.1% | 95.5% |
| On own (self-guided) | 43.2% | 68.8% |
| Helicopter/ airplane | 1.3% | 2.3% |
| Boat/ submarine/ whale | 12.2% | 9.7% |
| Visit towns | 29.0% | 31.2% |
| Limo/ van/ bus tour | 27.9% | 19.5% |
| Scenic views/ natural landmark | 25.4% | 23.3% |
| Movie/ TV/ film location | 6.3% | 4.1% |

ACTIVITIES – RECREATION – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.6% | 94.5% | 100.0% | 100.0% | 95.2% | 94.1% |
| Beach/ sunbathing | 75.6% | 65.3% | 0.0% | 74.8% | 57.9% | 41.0% |
| Bodyboard/ Standup paddle board | 3.5% | 4.2% | 0.0% | 0.0% | 3.6% | 4.0% |
| Surfing | 4.1% | 3.5% | 0.0% | 12.6% | 1.1% | 0.0% |
| Canoeing/ kayak | 1.9% | 2.1% | 0.0% | 0.0% | 2.8% | 0.0% |
| Swim- ocean | 39.9% | 37.1% | 0.0% | 25.2% | 27.7% | 14.5% |
| Snorkel | 15.5% | 22.2% | 0.0% | | 21.0% | 8.1% |
| Windsurf/ Kitesurf | 0.2% | 1.4% | 0.0% | 0.0% | 0.1% | 0.0% |
| Jet ski/ Parasail | 3.5% | 2.1% | 0.0% | 0.0% | 0.2% | 2.1% |
| Scuba | 2.1% | 1.4% | 0.0% | 0.0% | 2.3% | 0.0% |
| Fishing | 1.5% | 1.4% | 0.0% | 0.0% | 1.5% | 0.0% |
| Golf | 5.4% | 11.9% | 0.0% | 0.0% | 14.1% | 6.2% |

STATEWIDE - ACTIVITIES – RECREATION – JAPAN

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 88.5% | 96.2% |
| Beach/ sunbathing | 68.3% | 73.1% |
| Bodyboard/ Standup paddle board | 5.0% | 3.7% |
| Surfing | 3.7% | 3.6% |
| Canoeing/ kayak | 2.8% | 2.1% |
| Swim- ocean | NA | 38.4% |
| Snorkel | NA | 17.2% |
| Windsurf/ Kitesurf | 0.5% | 0.2% |
| Jet ski/ Parasail | 3.7% | 2.9% |
| Scuba | 3.0% | 2.2% |
| Fishing | 1.2% | 1.5% |
| Golf | 5.4% | 7.5% |

ACTIVITIES – RECREATION – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.6% | 94.5% | 100.0% | 100.0% | 95.2% | 94.1% |
| Run/ Jog/ Fitness walk | 14.7% | 12.4% | 0.0% | 0.0% | 14.0% | 4.1% |
| Spa | 6.6% | 2.8% | 0.0% | 0.0% | 5.3% | 2.1% |
| Hiking/Backpack/Camp | 7.9% | 4.1% | 0.0% | 0.0% | 5.0% | 6.2% |
| Agritourism | 9.1% | 14.3% | 100.0% | 0.0% | 20.6% | 28.6% |
| Sport event/ tournament | 1.5% | 5.6% | 0.0% | 0.0% | 2.2% | 0.0% |
| Park/ botanical garden | 22.8% | 23.9% | 100.0% | 0.0% | 24.3% | 44.9% |
| Waterpark | 3.6% | 0.0% | 0.0% | 0.0% | 3.1% | 0.0% |
| Mountain tube/ waterfall rappel | 0.4% | 0.7% | 0.0% | 0.0% | 1.7% | 0.0% |
| Zip-lining | 0.6% | 2.1% | 0.0% | 0.0% | 0.5% | 0.0% |
| Skydiving | 1.0% | 0.7% | 0.0% | 0.0% | 0.1% | 0.0% |
| All terrain vehicle (ATV) | 1.2% | 1.4% | 0.0% | 0.0% | 0.5% | 0.0% |
| Horseback riding | 4.8% | 6.8% | 0.0% | 0.0% | 4.7% | 0.0% |

STATEWIDE - ACTIVITIES – RECREATION – JAPAN

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 88.5% | 96.2% |
| Run/ Jog/ Fitness walk | 14.9% | 14.7% |
| Spa | 6.9% | 6.5% |
| Hiking/Backpack/Camp | 7.1% | 7.4% |
| Agritourism | 2.7% | 12.2% |
| Sport event/ tournament | 1.9% | 1.8% |
| Park/ botanical garden | 20.1% | 24.0% |
| Waterpark | NA | 3.5% |
| Mountain tube/ waterfall rappel | NA | 0.7% |
| Zip-lining | NA | 0.7% |
| Skydiving | NA | 0.8% |
| All terrain vehicle (ATV) | NA | 1.1% |
| Horseback riding | NA | 5.0% |

ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.4% | 97.9% | 100.0% | 87.4% | 96.6% | 85.8% |
| Lunch/ sunset/ dinner/ evening cruise | 17.0% | 13.7% | 0.0% | 24.4% | 8.0% | 10.1% |
| Live music/ stage show | 19.6% | 16.4% | 0.0% | 12.6% | 19.4% | 16.4% |
| Nightclub/ dancing/ bar/ karaoke | 7.2% | 10.2% | 0.0% | 12.6% | 2.9% | 4.1% |
| Fine dining | 48.0% | 43.9% | 0.0% | 37.8% | 30.9% | 26.7% |
| Family restaurant | 23.0% | 19.4% | 0.0% | 0.0% | 23.4% | 10.3% |
| Fast food | 55.1% | 33.2% | 0.0% | 0.0% | 45.1% | 14.2% |
| Food truck | 16.5% | 9.0% | 0.0% | 0.0% | 6.2% | 6.1% |
| Café/ coffee house | 55.4% | 40.6% | 100.0% | 0.0% | 44.4% | 32.9% |
| Ethnic dining | 10.4% | 13.7% | 0.0% | 0.0% | 8.2% | 4.1% |
| Prepared own meal | 14.5% | 19.5% | 0.0% | 0.0% | 33.2% | 14.5% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 92.6% | 98.3% |
| Lunch/ sunset/ dinner/ evening cruise | 46.6% | 15.7% |
| Live music/ stage show | 17.4% | 20.3% |
| Nightclub/ dancing/ bar/ karaoke | 4.1% | 6.6% |
| Fine dining | 36.2% | 45.4% |
| Family restaurant | 26.3% | 23.4% |
| Fast food | 46.4% | 53.0% |
| Food truck | NA | 14.6% |
| Café/ coffee house | 48.4% | 53.8% |
| Ethnic dining | 7.0% | 10.3% |
| Prepared own meal | 16.7% | 18.7% |

ACTIVITIES – SHOPPING – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 97.9% | 97.2% | 100.0% | 87.4% | 95.9% | 85.8% |
| Mall/ department store | 85.0% | 62.0% | 0.0% | 24.4% | 56.4% | 40.9% |
| Designer boutique | 29.8% | 9.7% | 0.0% | 0.0% | 5.8% | 6.2% |
| Hotel/ resort store | 36.5% | 28.7% | 0.0% | 12.6% | 27.7% | 24.8% |
| Swap meet/ flea market | 3.7% | 5.5% | 0.0% | 0.0% | 2.6% | 2.1% |
| Discount/ outlet store | 27.7% | 16.6% | 0.0% | 0.0% | 6.6% | 1.9% |
| Supermarket | 63.7% | 50.4% | 0.0% | 25.2% | 72.5% | 47.0% |
| Farmer's market | 17.1% | 6.2% | 0.0% | 0.0% | 21.3% | 8.1% |
| Convenience store | 51.4% | 24.9% | 0.0% | 0.0% | 21.4% | 2.1% |
| Duty free store | 50.1% | 27.2% | 0.0% | 25.2% | 7.0% | 6.2% |
| Local shop/ artisan | 9.2% | 12.4% | 100.0% | 0.0% | 14.9% | 20.5% |

STATEWIDE - ACTIVITIES – SHOPPING – JAPAN

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 96.6% | 97.6% |
| Mall/ department store | 82.2% | 79.9% |
| Designer boutique | 33.5% | 25.1% |
| Hotel/ resort store | 39.2% | 35.4% |
| Swap meet/ flea market | 8.9% | 3.6% |
| Discount/ outlet store | 34.1% | 23.7% |
| Supermarket | 57.7% | 65.7% |
| Farmer's market | 18.6% | 18.1% |
| Convenience store | 54.1% | 45.6% |
| Duty free store | 43.6% | 42.1% |
| Local shop/ artisan | 15.3% | 10.7% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 53.3% | 61.7% | 0.0% | 62.2% | 58.9% | 67.5% |
| Historic military site | 18.5% | 18.4% | 0.0% | 12.6% | 13.6% | 18.5% |
| Other historical site | 14.9% | 27.4% | 0.0% | 12.6% | 26.4% | 36.9% |
| Museum/ art gallery | 6.9% | 8.2% | 0.0% | 0.0% | 2.7% | 8.3% |
| Luau/ Polynesian show/ hula show | 12.2% | 6.2% | 0.0% | 12.6% | 14.1% | 8.1% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.2% | 2.8% | 0.0% | 12.6% | 5.9% | 12.3% |
| Play/ concert/ theatre | 3.3% | 2.0% | 0.0% | 0.0% | 2.2% | 4.1% |
| Art/ craft fair | 3.2% | 5.5% | 0.0% | 0.0% | 3.3% | 0.0% |
| Festival event | 2.8% | 7.0% | 0.0% | 11.8% | 3.4% | 2.1% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 39.9% | 55.5% |
| Historic military site | 11.3% | 18.1% |
| Other historical site | 10.6% | 18.1% |
| Museum/ art gallery | 6.9% | 6.4% |
| Luau/ Polynesian show/ hula show | 10.5% | 12.9% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.3% | 6.4% |
| Play/ concert/ theatre | 2.3% | 3.1% |
| Art/ craft fair | 2.2% | 3.4% |
| Festival event | 3.2% | 3.1% |

ACTIVITIES – TRANSPORTATION – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.7% | 95.8% | 0.0% | 100.0% | 96.4% | 97.9% |
| Airport shuttle | 25.1% | 12.4% | 0.0% | 37.8% | 18.9% | 18.6% |
| Trolley | 54.3% | 8.3% | 0.0% | 0.0% | 14.1% | 0.0% |
| Public bus | 20.2% | 11.0% | 0.0% | 0.0% | 2.9% | 2.1% |
| Tour bus/ tour van | 25.3% | 26.7% | 0.0% | 11.8% | 30.6% | 48.6% |
| Taxi/ limo | 33.5% | 23.6% | 0.0% | 25.2% | 22.8% | 14.2% |
| Rental car | 27.0% | 60.1% | 0.0% | 12.6% | 50.6% | 37.2% |
| Ride share | 3.5% | 1.4% | 0.0% | 12.6% | 1.9% | 2.1% |
| Bicycle rental | 3.4% | 1.4% | 0.0% | 0.0% | 1.0% | 0.0% |

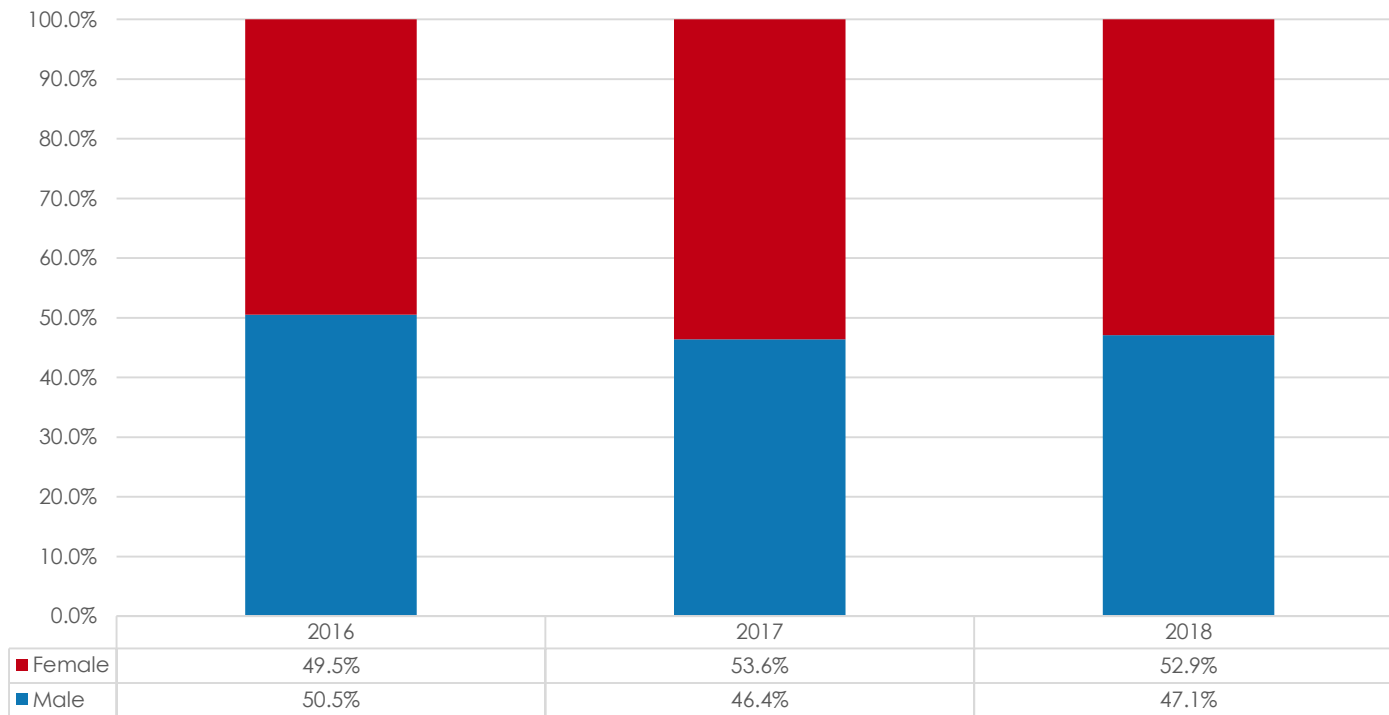
STATEWIDE - ACTIVITIES – TRANSPORTATION – JAPAN

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 98.6% | 95.9% |
| Airport shuttle | 32.0% | 24.0% |
| Trolley | 56.1% | 46.2% |
| Public bus | 19.2% | 16.9% |
| Tour bus/ tour van | 31.2% | 27.0% |
| Taxi/ limo | 33.2% | 31.7% |
| Rental car | 23.4% | 33.1% |
| Ride share | NA | 3.2% |
| Bicycle rental | NA | 2.9% |

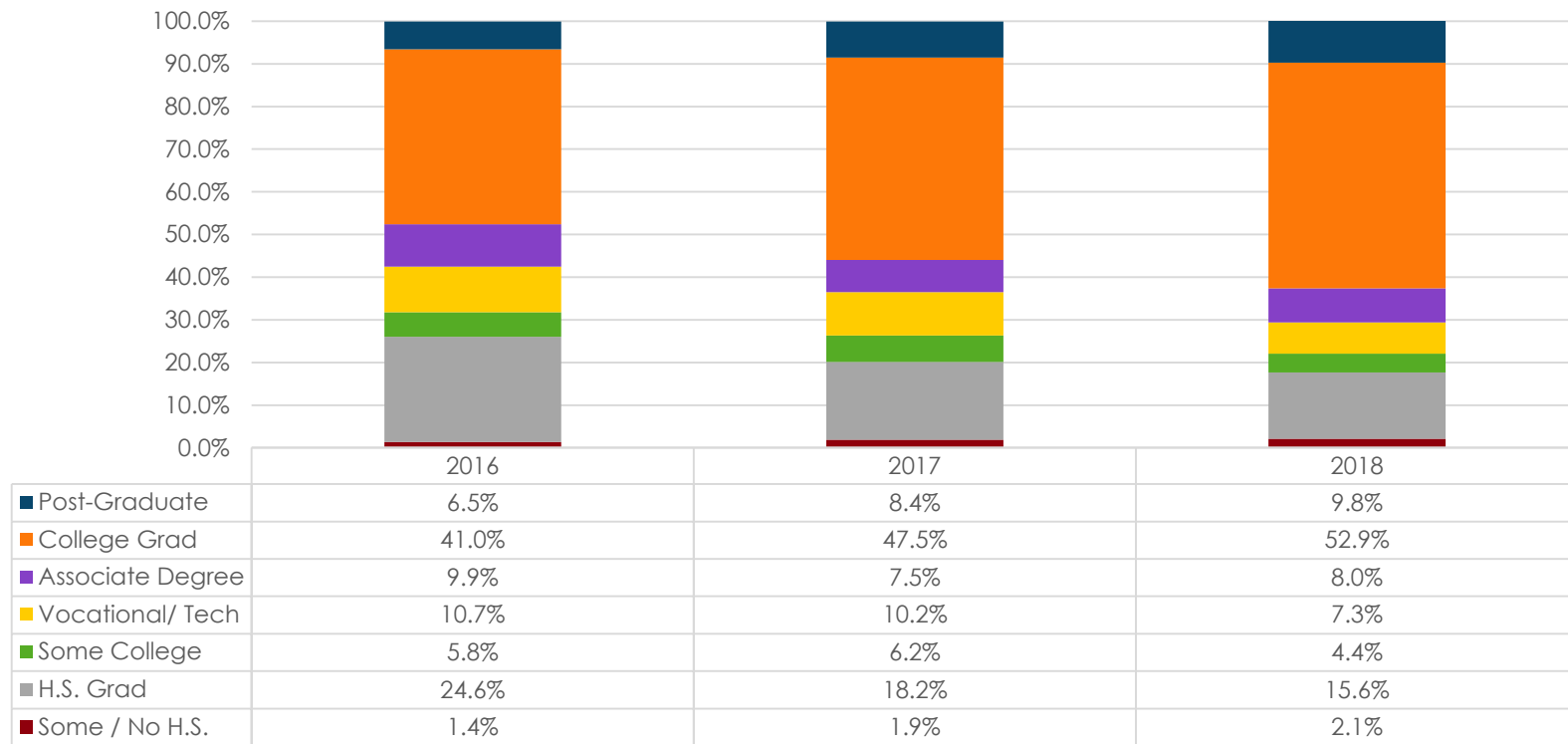
ACTIVITIES – OTHER – JAPAN

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|------------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 11.9% | 12.4% | 100.0% | 24.4% | 13.0% | 8.1% |
| Visit friends/ family | 11.2% | 11.7% | 100.0% | 11.8% | 12.8% | 6.2% |
| Volunteer- non-profit | 0.8% | 0.7% | 0.0% | 12.6% | 0.6% | 1.9% |

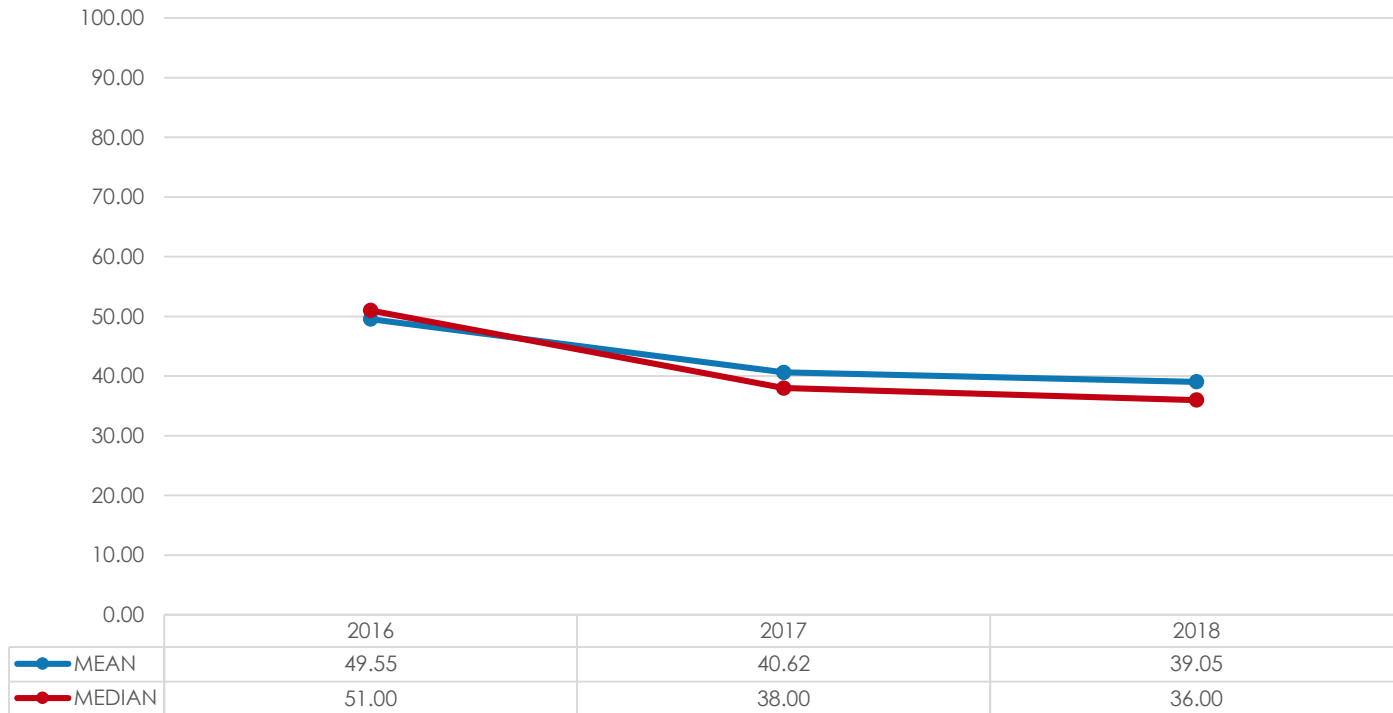
VISITOR PROFILE – GENDER – JAPAN



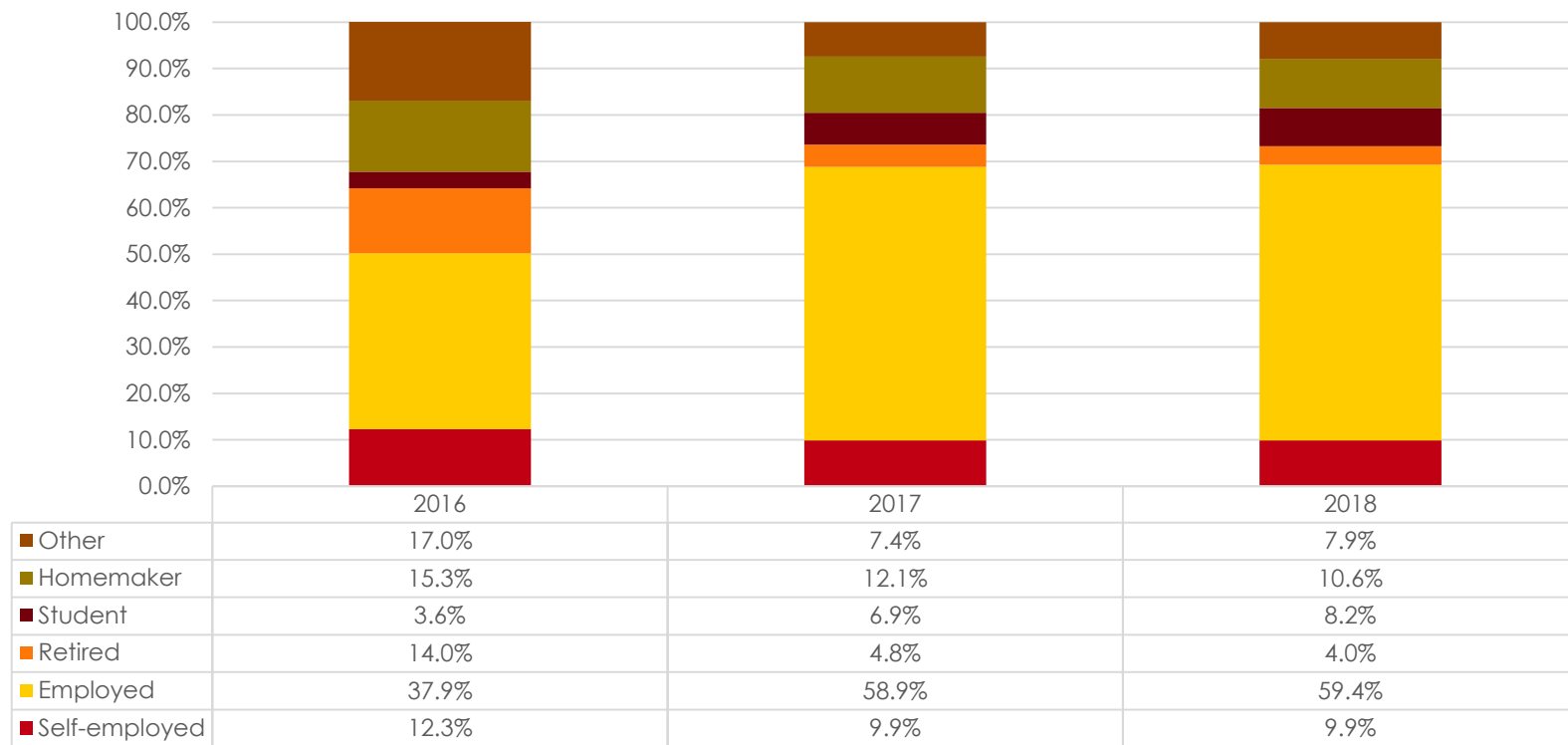
VISITOR PROFILE – EDUCATION – JAPAN



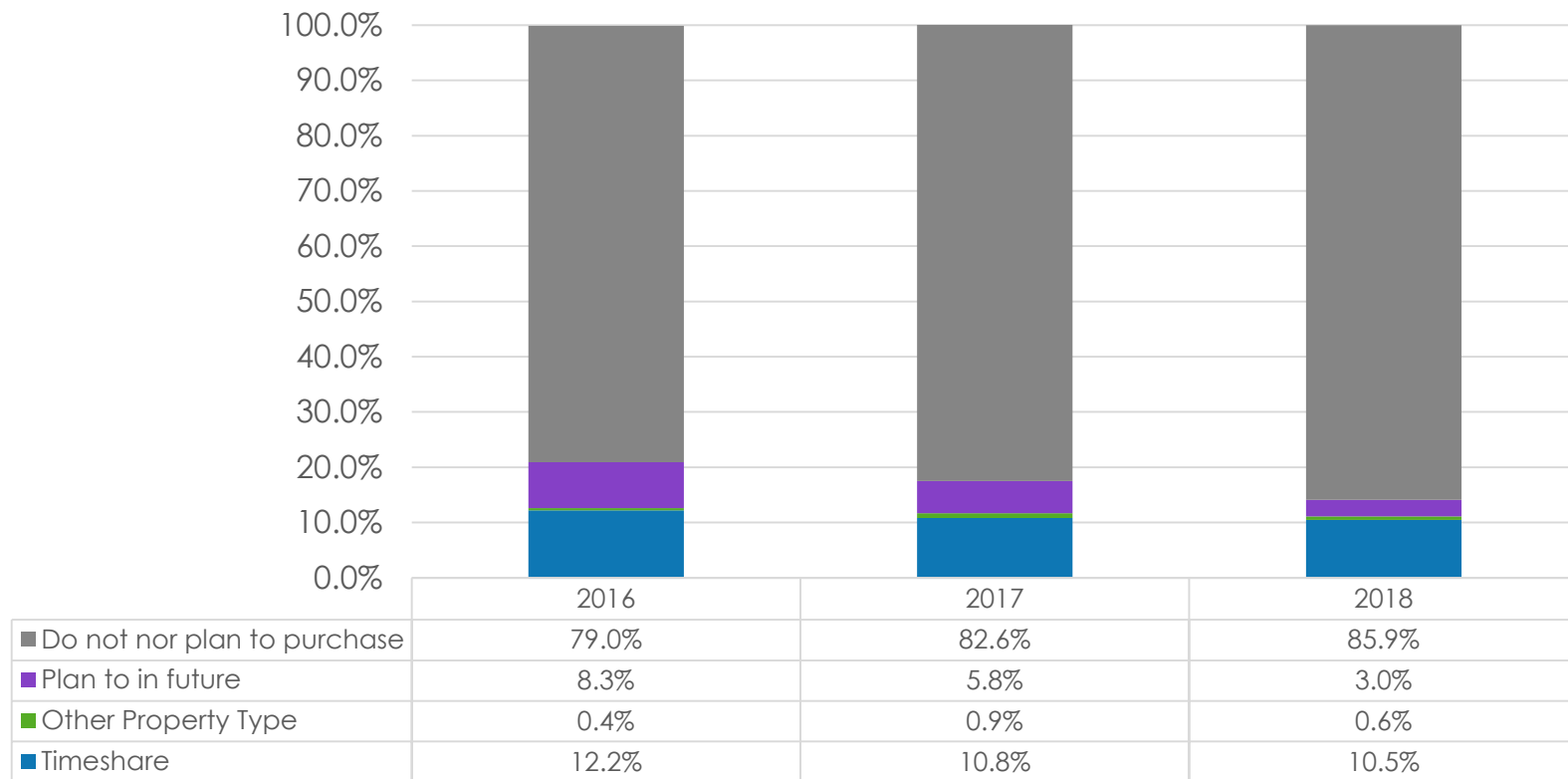
VISITOR PROFILE – AGE – JAPAN



VISITOR PROFILE – EMPLOYMENT STATUS – JAPAN



VISITOR PROFILE – HAWAII PROPERTY OWNER – JAPAN



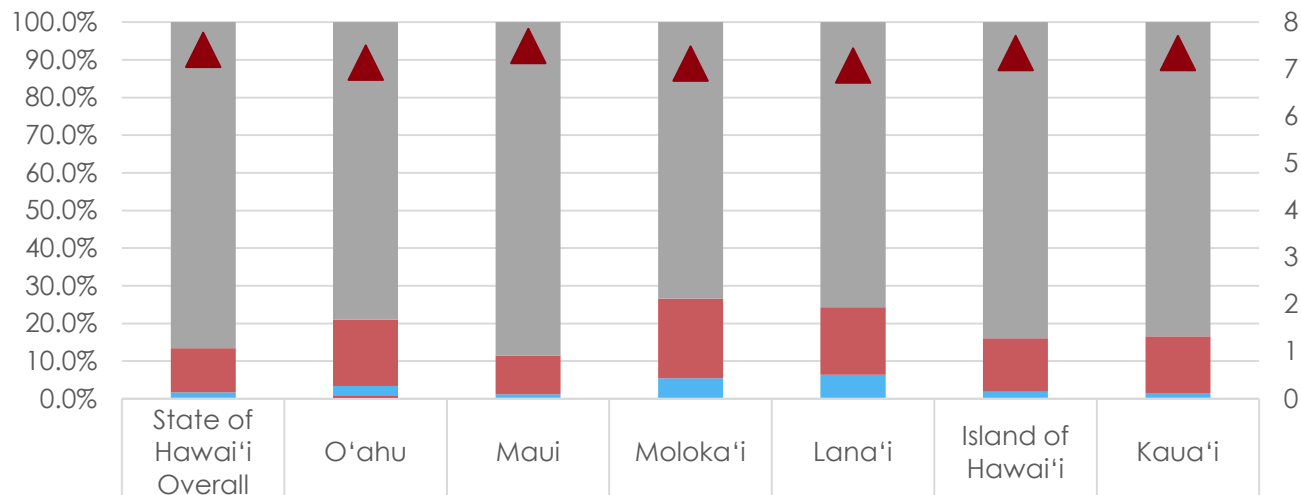
VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

| | Japanese |
|-----------------------|----------|
| < ¥3.5 million | 21.2% |
| ¥3.5 - ¥4.5 million | 14.1% |
| ¥4.5 - ¥5.5 million | 10.8% |
| ¥5.5 - ¥6.5 million | 7.4% |
| ¥6.5 - ¥7.5 million | 7.0% |
| ¥7.5 - ¥8.5 million | 6.8% |
| ¥8.5 - ¥10.0 million | 8.7% |
| ¥10.0 - ¥15.0 million | 13.3% |
| ¥15.0 - ¥20.0 million | 4.7% |
| ¥20.0 million + | 5.9% |

SECTION – CANADA

OVERALL SATISFACTION – MOST RECENT VISIT – CANADA

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



| | | | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Extremely satisfied (7-8) | 86.7% | 79.1% | 88.5% | 73.4% | 75.7% | 83.9% | 83.4% |
| ■ Somewhat satisfied (5-6) | 11.7% | 17.6% | 10.3% | 21.2% | 17.9% | 14.2% | 15.1% |
| ■ Somewhat dissatisfied (3-4) | 1.6% | 2.7% | 1.2% | 5.4% | 6.4% | 1.8% | 1.4% |
| ■ Not at all satisfied (1-2) | 0.1% | 0.7% | 0.0% | 0.0% | 0.0% | 0.1% | 0.1% |
| BASE | 5,384 | 2,162 | 2,164 | 34 | 50 | 1,526 | 1,087 |
| ▲ MEAN | 7.41 | 7.14 | 7.49 | 7.12 | 7.08 | 7.34 | 7.34 |

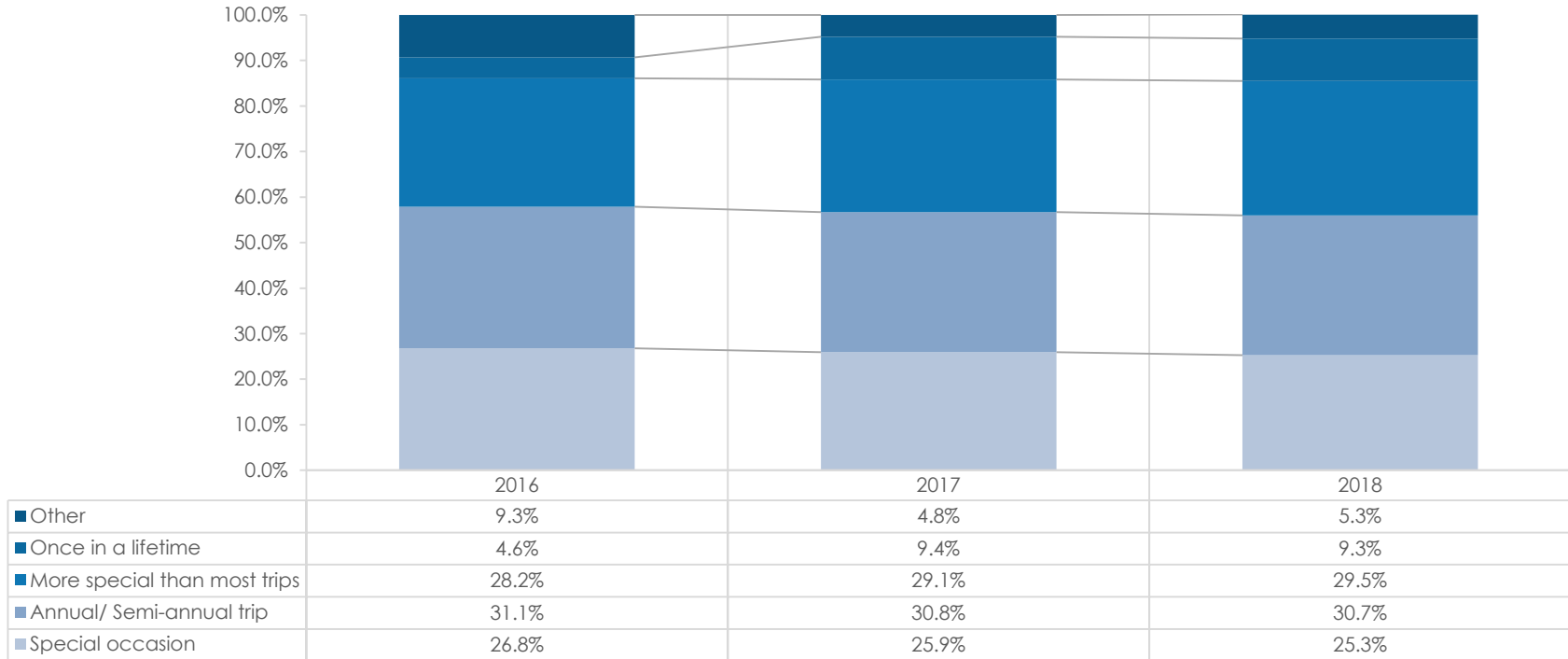
PRIMARY TRIP PURPOSE CANADA

| | 2017 | 2018 |
|-----------------------------------|-------|-------|
| Vacation | 75.5% | 74.3% |
| Anniversary/ birthday | 6.7% | 5.7% |
| Visit friends or relatives | 3.0% | 3.1% |
| Attend wedding/ vow renewal | 2.0% | 2.8% |
| Honeymoon | 2.5% | 2.3% |
| Vacation home/ timeshare | 0.1% | 2.1% |
| Family gathering/ reunion | 1.4% | 2.1% |
| Convention, conference or seminar | 2.4% | 1.8% |
| Business trip | 1.4% | 0.9% |

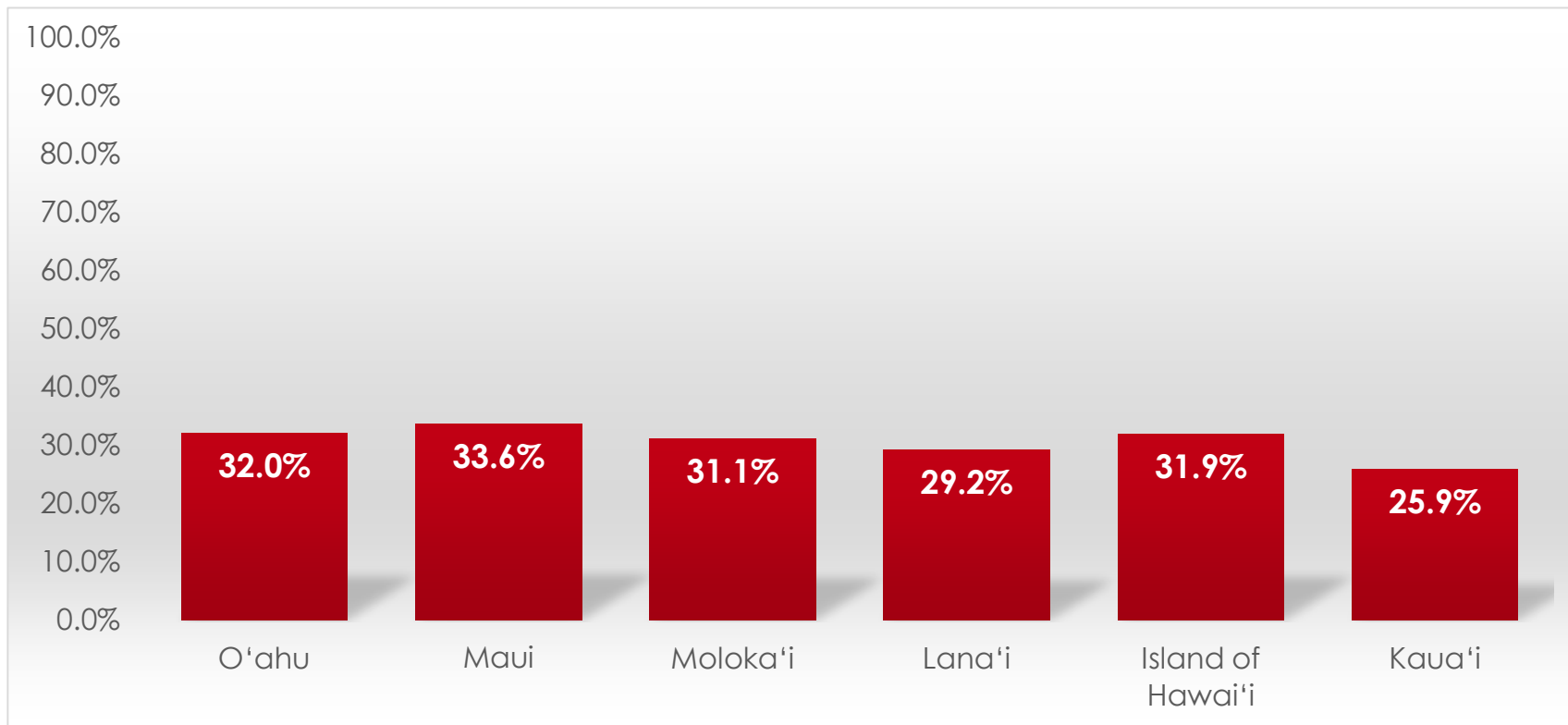
TRIP PURPOSE – MULTIPLE RESPONSE CANADA

| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 96.4% | 91.4% |
| Anniversary/ birthday | 18.0% | 12.1% |
| Visit friends/ relatives | 12.5% | 8.4% |
| Family gathering/ reunion | 7.7% | 5.4% |
| Vacation home/ timeshare | .4% | 5.1% |
| Attend wedding/ vow renewal | 2.3% | 3.2% |
| Honeymoon | 3.4% | 2.9% |
| Convention, conference, seminar | 3.5% | 2.5% |
| Sporting event | 2.0% | 2.1% |

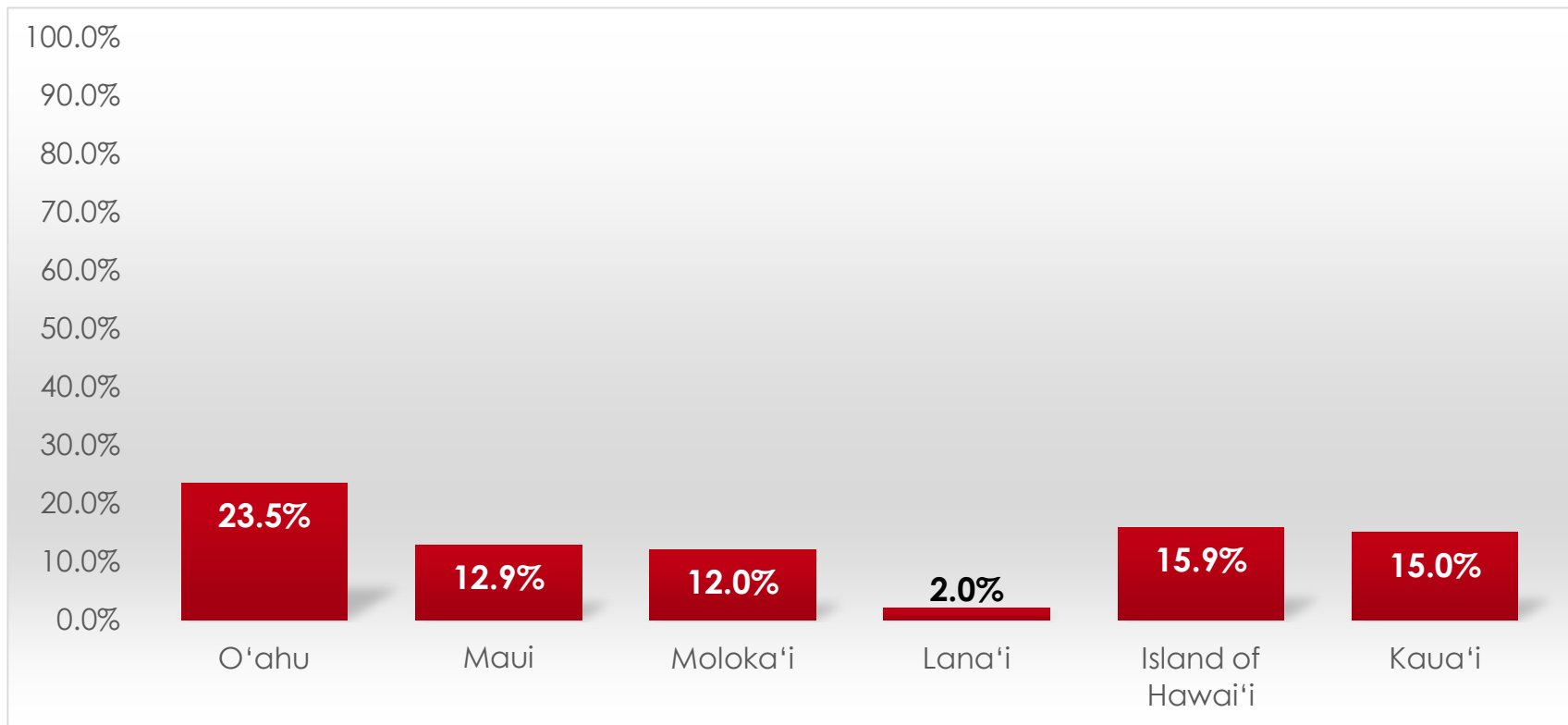
VACATION TRIP DESCRIPTION – CANADA



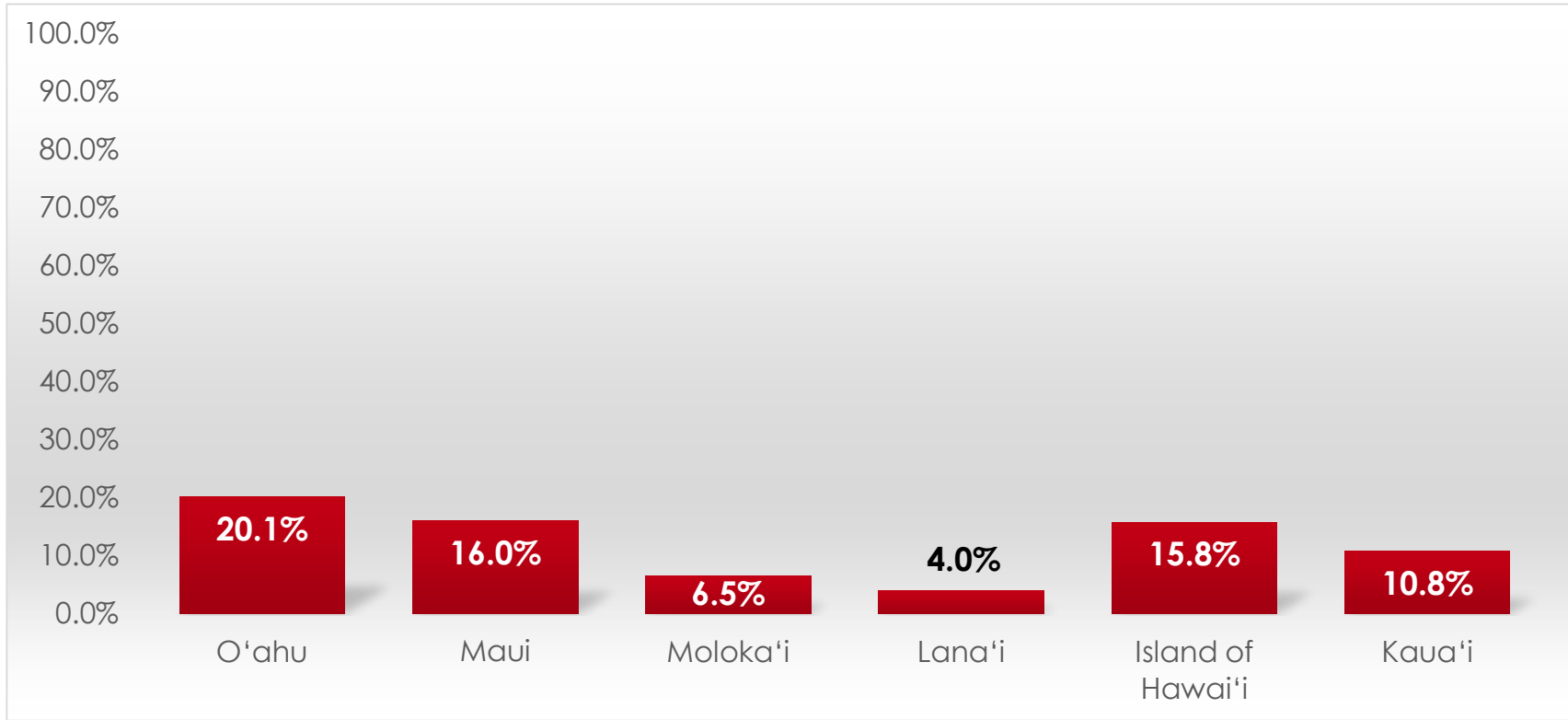
ADVERTISING AWARENESS – CANADA



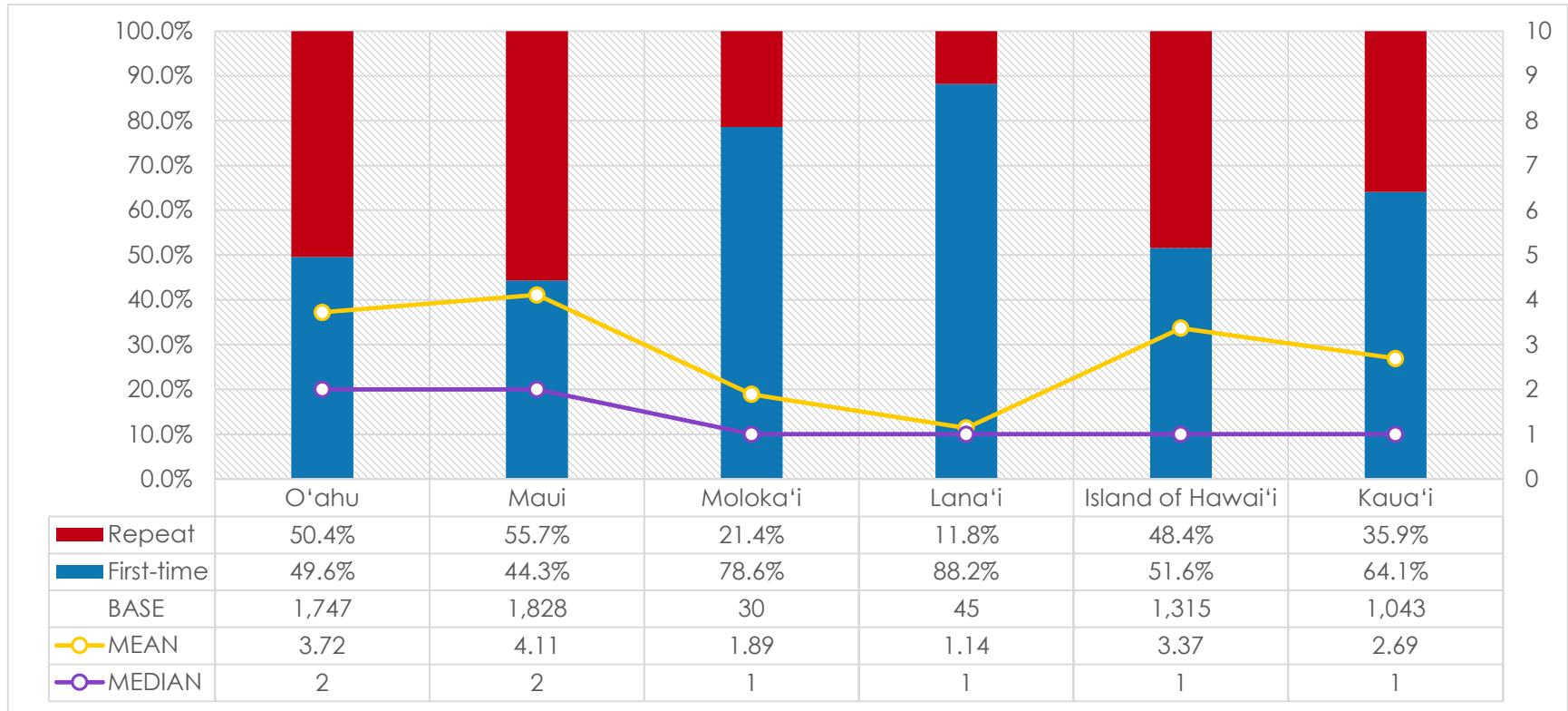
IMPACT OF LOCATION FILMING – CANADA



IMPACT OF HAWAIIAN MUSIC – CANADA



1ST TIME VS REPEAT VISITOR – CANADA

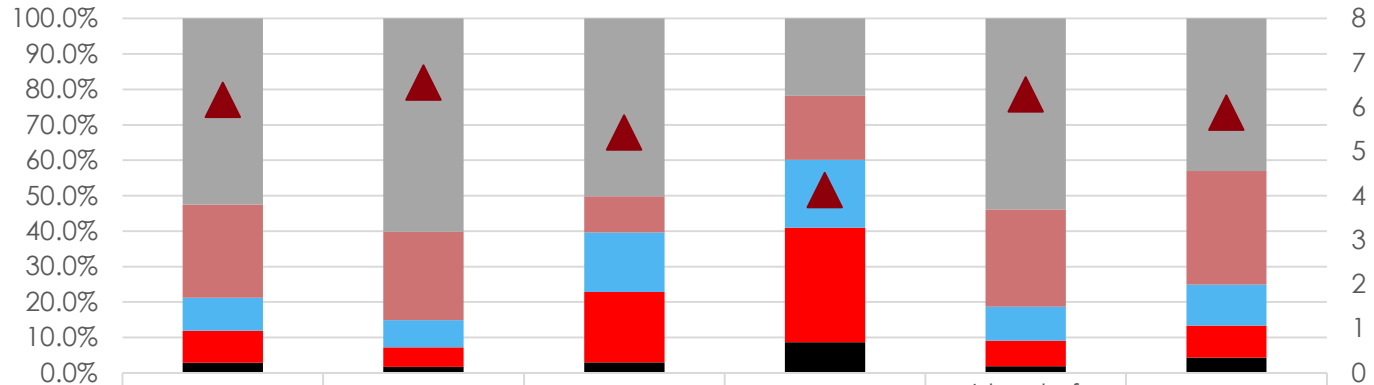


TRAVEL PARTY MEMBERS – CANADA

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 69.7% | 66.6% | 63.3% |
| Other adult family | 27.2% | 25.1% | 28.6% |
| Child under 18 | 23.2% | 23.9% | 22.9% |
| Friends/ associates | 18.6% | 17.9% | 18.2% |
| Alone | 6.6% | 6.4% | 6.0% |
| Girlfriend/ boyfriend | 6.7% | 7.0% | 8.3% |
| Same-sex partner | .6% | .9% | 0.9% |

LIKELIHOOD OF RETURN VISIT – CANADA

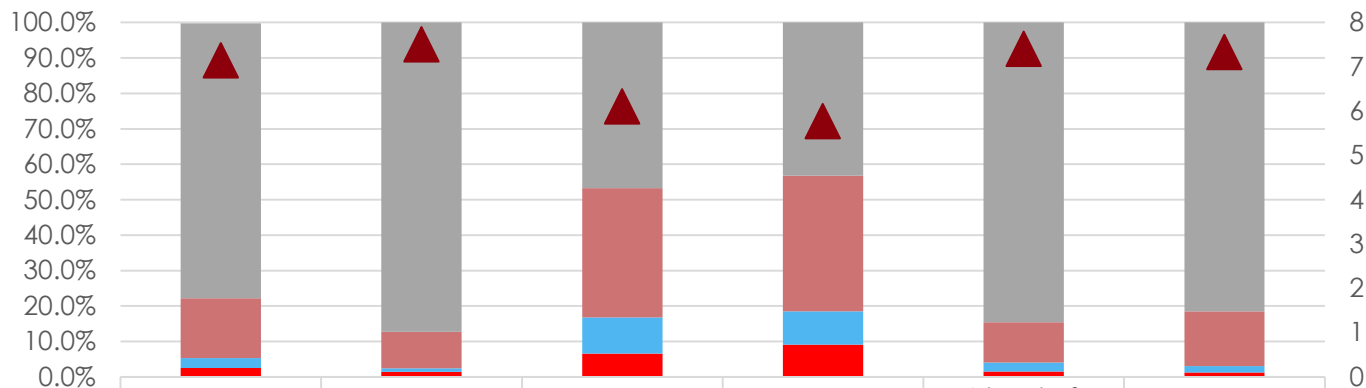
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 52.6% | 60.3% | 50.3% | 21.8% | 54.0% | 43.0% |
| ■ Somewhat likely (5-6) | 26.3% | 24.9% | 10.2% | 18.1% | 27.4% | 32.1% |
| ■ Somewhat unlikely (3-4) | 9.3% | 7.7% | 16.8% | 19.1% | 9.6% | 11.5% |
| ■ Very unlikely (1-2) | 9.0% | 5.5% | 19.8% | 32.3% | 7.2% | 9.1% |
| ■ Not sure | 2.9% | 1.7% | 3.0% | 8.7% | 1.9% | 4.3% |
| BASE | 1,739 | 1,818 | 30 | 45 | 1,304 | 1,038 |
| ▲ MEAN | 6.16 | 6.55 | 5.42 | 4.12 | 6.28 | 5.87 |

BRAND/DESTINATION ADVOCACY – CANADA

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------|-------|-------|----------|--------|-------------------|--------|
| Very likely (7-8) | 77.5% | 87.4% | 46.7% | 43.2% | 84.6% | 81.5% |
| Somewhat likely (5-6) | 16.9% | 10.3% | 36.5% | 38.3% | 11.3% | 15.4% |
| Somewhat unlikely (3-4) | 2.8% | 1.0% | 10.2% | 9.4% | 2.6% | 1.8% |
| Very unlikely (1-2) | 2.5% | 1.3% | 6.6% | 9.1% | 1.3% | 1.1% |
| Not sure | 0.0% | 0.1% | 0.0% | 0.0% | 0.2% | 0.2% |
| BASE | 1,728 | 1,812 | 30 | 45 | 1,294 | 1,035 |
| MEAN | 7.14 | 7.50 | 6.10 | 5.77 | 7.40 | 7.33 |

ACTIVITIES – SIGHTSEEING – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 94.7% | 97.2% | 100.0% | 93.6% | 96.7% | 97.1% |
| On own (self-guided) | 75.4% | 88.4% | 64.0% | 39.6% | 88.4% | 84.6% |
| Helicopter/ airplane | 2.2% | 5.4% | 13.2% | 0.0% | 10.3% | 19.8% |
| Boat/ submarine/ whale | 14.9% | 28.6% | 13.7% | 28.5% | 23.0% | 26.9% |
| Visit towns | 45.5% | 62.2% | 53.3% | 31.6% | 62.1% | 63.9% |
| Limo/ van/ bus tour | 16.8% | 7.4% | 6.6% | 18.1% | 7.6% | 7.5% |
| Scenic views/ natural landmark | 62.6% | 63.5% | 71.1% | 22.1% | 70.2% | 76.3% |
| Movie/ TV/ film location | 10.7% | 0.8% | 0.0% | 2.0% | 1.3% | 4.8% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - CANADA

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 97.9% | 96.7% |
| On own (self-guided) | 87.5% | 85.5% |
| Helicopter/ airplane | 10.1% | 8.9% |
| Boat/ submarine/ whale | 29.6% | 25.2% |
| Visit towns | 40.0% | 59.5% |
| Limo/ van/ bus tour | 11.2% | 10.8% |
| Scenic views/ natural landmark | 76.6% | 68.0% |
| Movie/ TV/ film location | 5.9% | 5.0% |

ACTIVITIES – RECREATION – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 96.5% | 98.5% | 89.8% | 79.9% | 98.2% | 96.7% |
| Beach/ sunbathing | 87.8% | 92.7% | 71.1% | 51.0% | 87.9% | 84.4% |
| Bodyboard/ Standup paddle board | 13.0% | 18.6% | 14.3% | 0.0% | 18.0% | 13.5% |
| Surfing | 9.7% | 11.6% | 7.1% | 2.4% | 6.9% | 10.0% |
| Canoeing/ kayak | 4.5% | 3.8% | 6.6% | 0.0% | 7.8% | 12.0% |
| Swim- ocean | 71.5% | 77.7% | 41.2% | 42.3% | 76.2% | 69.0% |
| Snorkel | 38.2% | 59.0% | 44.2% | 39.9% | 61.8% | 46.3% |
| Windsurf/ Kitesurf | 0.4% | 0.7% | 0.0% | 0.0% | 0.2% | 0.3% |
| Jet ski/ Parasail | 2.3% | 0.7% | 0.0% | 0.0% | 0.8% | 0.1% |
| Scuba | 1.8% | 4.0% | 7.1% | 0.0% | 4.9% | 2.6% |
| Fishing | 1.4% | 2.3% | 3.0% | 0.0% | 3.1% | 2.3% |
| Golf | 3.2% | 9.3% | 7.1% | 4.4% | 8.1% | 10.1% |

STATEWIDE - ACTIVITIES – RECREATION – CANADA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 98.7% | 98.2% |
| Beach/ sunbathing | 91.2% | 90.6% |
| Bodyboard/ Standup paddle board | 23.9% | 17.1% |
| Surfing | 12.0% | 10.5% |
| Canoeing/ kayak | 8.4% | 7.0% |
| Swim- ocean | NA | 76.5% |
| Snorkel | NA | 54.0% |
| Windsurf/ Kitesurf | 0.8% | 0.5% |
| Jet ski/ Parasail | 1.3% | 1.2% |
| Scuba | 5.0% | 3.6% |
| Fishing | 2.5% | 2.4% |
| Golf | 9.5% | 8.0% |

ACTIVITIES – RECREATION – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 96.5% | 98.5% | 89.8% | 79.9% | 98.2% | 96.7% |
| Run/ Jog/ Fitness walk | 29.2% | 33.1% | 20.3% | 4.4% | 30.4% | 33.9% |
| Spa | 5.1% | 7.8% | 3.6% | 2.0% | 5.0% | 6.1% |
| Hiking/Backpack/Camp | 34.9% | 28.2% | 50.8% | 6.7% | 35.7% | 43.1% |
| Agritourism | 12.8% | 8.2% | 19.8% | 6.7% | 15.0% | 10.2% |
| Sport event/ tournament | 3.6% | 2.2% | 6.6% | 0.0% | 5.7% | 1.1% |
| Park/ botanical garden | 39.0% | 36.4% | 27.5% | 15.1% | 51.2% | 41.6% |
| Waterpark | 2.1% | 1.1% | 0.0% | 0.0% | 1.7% | 0.8% |
| Mountain tube/ waterfall rappel | 0.7% | 0.5% | 0.0% | 0.0% | 0.9% | 4.4% |
| Zip-lining | 2.2% | 4.1% | 0.0% | 0.0% | 3.2% | 3.5% |
| Skydiving | 0.8% | 0.0% | 0.0% | 0.0% | 0.5% | 0.1% |
| All terrain vehicle (ATV) | 2.5% | 0.8% | 0.0% | 2.4% | 2.1% | 3.9% |
| Horseback riding | 1.7% | 0.8% | 0.0% | 0.0% | 2.8% | 2.2% |

STATEWIDE - ACTIVITIES – RECREATION – CANADA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 98.7% | 98.2% |
| Run/ Jog/ Fitness walk | 41.0% | 33.1% |
| Spa | 6.6% | 6.7% |
| Hiking/Backpack/Camp | 29.3% | 35.5% |
| Agritourism | 9.5% | 12.5% |
| Sport event/ tournament | 3.2% | 3.6% |
| Park/ botanical garden | 46.2% | 43.4% |
| Waterpark | NA | 1.6% |
| Mountain tube/ waterfall rappel | NA | 1.5% |
| Zip-lining | NA | 3.6% |
| Skydiving | NA | 0.4% |
| All terrain vehicle (ATV) | NA | 2.3% |
| Horseback riding | NA | 1.9% |

ACTIVITIES – ENTERTAINMENT & DINING – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 99.2% | 99.1% | 89.8% | 84.2% | 98.1% | 95.9% |
| Lunch/ sunset/ dinner/ evening cruise | 19.2% | 21.3% | 16.2% | 28.5% | 18.7% | 22.6% |
| Live music/ stage show | 34.2% | 30.9% | 27.5% | 2.4% | 28.6% | 27.2% |
| Nightclub/ dancing/ bar/ karaoke | 11.0% | 6.6% | 6.6% | 0.0% | 7.7% | 5.4% |
| Fine dining | 43.5% | 52.1% | 13.7% | 19.4% | 43.4% | 44.2% |
| Family restaurant | 65.4% | 63.8% | 38.2% | 10.0% | 61.4% | 54.1% |
| Fast food | 58.9% | 40.9% | 24.4% | 8.0% | 41.7% | 37.2% |
| Food truck | 43.8% | 33.3% | 10.2% | 4.7% | 18.7% | 37.0% |
| Café/ coffee house | 48.7% | 48.8% | 36.0% | 22.5% | 55.8% | 49.6% |
| Ethnic dining | 28.7% | 23.7% | 6.0% | 0.0% | 25.2% | 22.8% |
| Prepared own meal | 48.5% | 72.3% | 58.0% | 22.1% | 74.1% | 66.9% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – CANADA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 99.0% | 98.6% |
| Lunch/ sunset/ dinner/ evening cruise | 27.4% | 21.9% |
| Live music/ stage show | 33.0% | 33.3% |
| Nightclub/ dancing/ bar/ karaoke | 8.3% | 8.6% |
| Fine dining | 47.5% | 48.1% |
| Family restaurant | 71.9% | 63.4% |
| Fast food | 44.1% | 47.1% |
| Food truck | NA | 35.2% |
| Café/ coffee house | 54.8% | 52.4% |
| Ethnic dining | 26.5% | 26.7% |
| Prepared own meal | 69.3% | 68.2% |

ACTIVITIES – SHOPPING – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 97.5% | 97.9% | 87.4% | 62.4% | 96.8% | 94.5% |
| Mall/ department store | 70.4% | 56.6% | 3.0% | 4.4% | 50.9% | 38.4% |
| Designer boutique | 20.9% | 19.3% | 6.6% | 6.4% | 14.9% | 17.8% |
| Hotel/ resort store | 33.0% | 24.2% | 3.0% | 11.4% | 24.2% | 19.8% |
| Swap meet/ flea market | 17.0% | 19.2% | 10.2% | 2.0% | 14.8% | 9.6% |
| Discount/ outlet store | 23.5% | 27.7% | 3.0% | 4.0% | 14.7% | 13.0% |
| Supermarket | 59.5% | 77.2% | 43.7% | 15.4% | 76.1% | 71.7% |
| Farmer's market | 27.7% | 39.2% | 41.2% | 4.4% | 57.5% | 47.7% |
| Convenience store | 62.2% | 50.8% | 33.5% | 12.7% | 45.1% | 37.5% |
| Duty free store | 12.1% | 6.8% | 3.0% | 0.0% | 4.4% | 2.0% |
| Local shop/ artisan | 55.1% | 68.3% | 70.6% | 28.9% | 67.5% | 70.8% |

STATEWIDE - ACTIVITIES – SHOPPING – CANADA

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 97.8% | 97.4% |
| Mall/ department store | 59.7% | 59.1% |
| Designer boutique | 25.4% | 19.9% |
| Hotel/ resort store | 27.5% | 27.4% |
| Swap meet/ flea market | 23.0% | 17.4% |
| Discount/ outlet store | 25.6% | 22.5% |
| Supermarket | 66.0% | 73.9% |
| Farmer's market | 42.4% | 44.7% |
| Convenience store | 50.0% | 52.7% |
| Duty free store | 5.9% | 7.4% |
| Local shop/ artisan | 71.7% | 66.7% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 77.4% | 65.8% | 70.1% | 47.4% | 74.3% | 63.4% |
| Historic military site | 41.8% | 2.9% | 9.6% | 10.7% | 8.7% | 4.8% |
| Other historical site | 25.1% | 19.5% | 36.5% | 16.1% | 42.1% | 27.7% |
| Museum/ art gallery | 17.1% | 18.4% | 10.2% | 14.2% | 21.1% | 16.5% |
| Luau/ Polynesian show/ hula show | 37.3% | 33.0% | 3.6% | 8.4% | 26.7% | 27.3% |
| Lesson- ex. ukulele, hula, canoe, lei making | 9.9% | 6.8% | 13.7% | 0.0% | 6.5% | 5.8% |
| Play/ concert/ theatre | 6.5% | 5.2% | 0.0% | 0.0% | 4.1% | 4.1% |
| Art/ craft fair | 7.4% | 14.8% | 3.6% | 0.0% | 16.4% | 16.8% |
| Festival event | 7.4% | 3.5% | 12.6% | 9.1% | 6.0% | 4.1% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 74.7% | 72.9% |
| Historic military site | 23.6% | 16.8% |
| Other historical site | 33.1% | 29.4% |
| Museum/ art gallery | 22.8% | 19.8% |
| Luau/ Polynesian show/ hula show | 36.5% | 34.4% |
| Lesson- ex. ukulele, hula, canoe, lei making | 5.1% | 8.2% |
| Play/ concert/ theatre | 6.1% | 5.5% |
| Art/ craft fair | 14.2% | 14.5% |
| Festival event | 10.4% | 6.0% |

ACTIVITIES – TRANSPORTATION – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 96.5% | 96.5% | 80.8% | 68.8% | 95.7% | 95.5% |
| Airport shuttle | 31.7% | 17.7% | 0.0% | 13.1% | 16.7% | 14.2% |
| Trolley | 8.1% | 1.9% | 3.0% | 0.0% | 4.7% | 0.8% |
| Public bus | 26.3% | 4.8% | 0.0% | 4.7% | 3.4% | 2.0% |
| Tour bus/ tour van | 19.3% | 8.3% | 9.6% | 22.9% | 8.4% | 9.7% |
| Taxi/ limo | 28.0% | 7.8% | 3.0% | 13.1% | 11.3% | 7.2% |
| Rental car | 60.3% | 89.2% | 65.1% | 14.7% | 87.8% | 85.8% |
| Ride share | 17.0% | 6.5% | 0.0% | 4.4% | 4.5% | 3.1% |
| Bicycle rental | 2.5% | 2.1% | 3.0% | 0.0% | 2.6% | 6.5% |

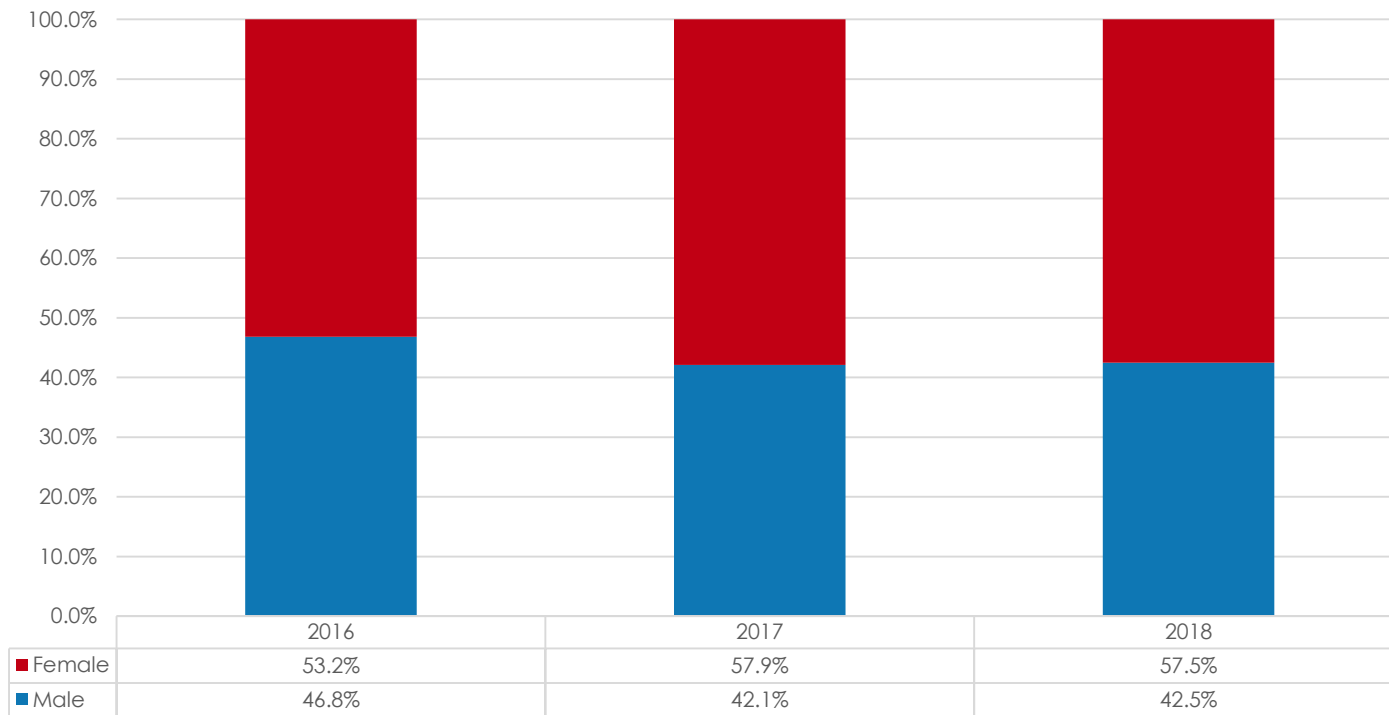
STATEWIDE - ACTIVITIES – TRANSPORTATION – CANADA

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 97.8% | 96.0% |
| Airport shuttle | 23.8% | 22.2% |
| Trolley | 4.7% | 4.5% |
| Public bus | 12.6% | 11.1% |
| Tour bus/ tour van | 11.5% | 12.4% |
| Taxi/ limo | 17.5% | 15.3% |
| Rental car | 82.8% | 81.1% |
| Ride share | NA | 9.1% |
| Bicycle rental | NA | 3.4% |

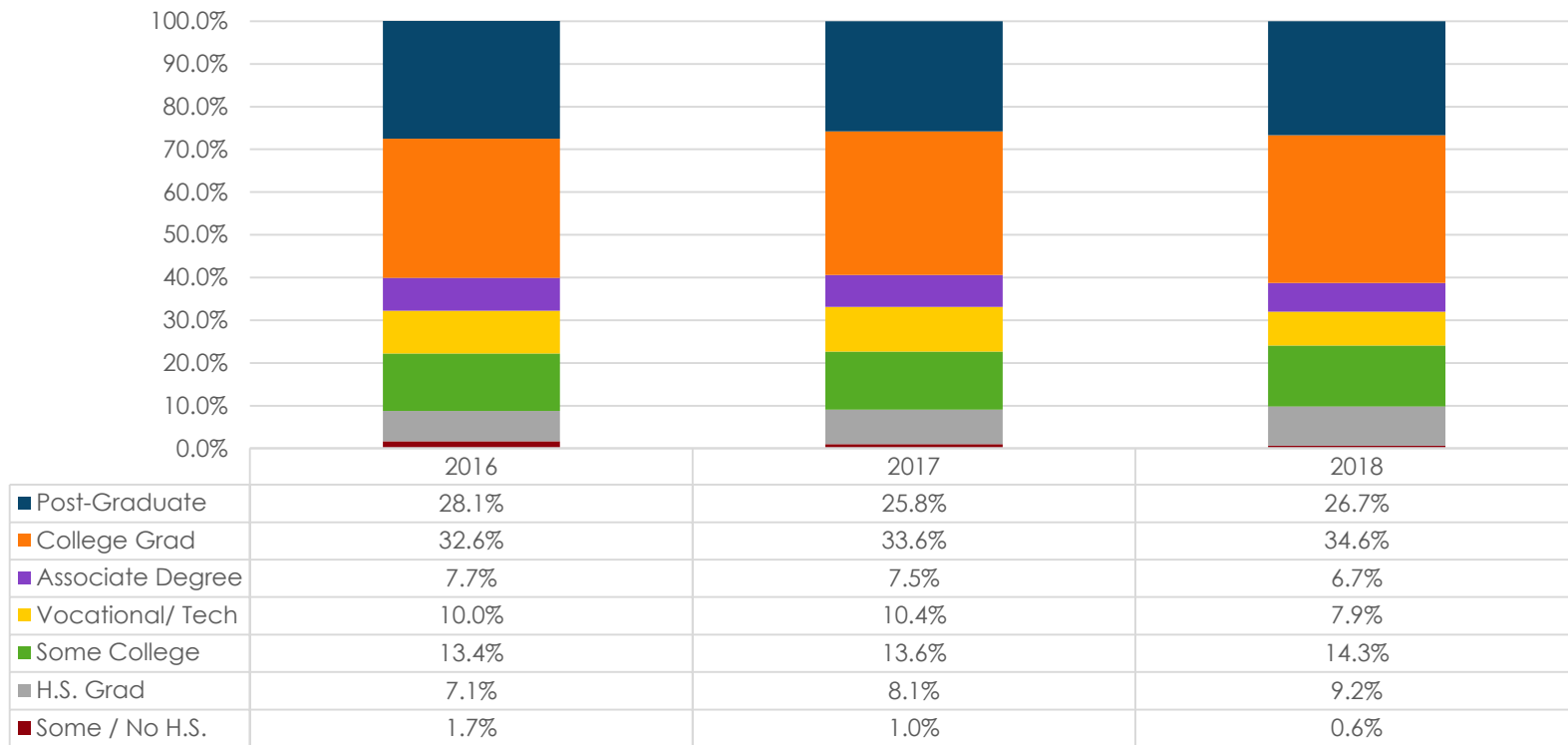
ACTIVITIES – OTHER – CANADA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 18.7% | 18.7% | 23.4% | 8.7% | 19.9% | 15.1% |
| Visit friends/ family | 18.1% | 17.8% | 20.3% | 6.4% | 18.9% | 13.5% |
| Volunteer- non-profit | 0.6% | 1.0% | 3.0% | 2.4% | 1.5% | 2.4% |

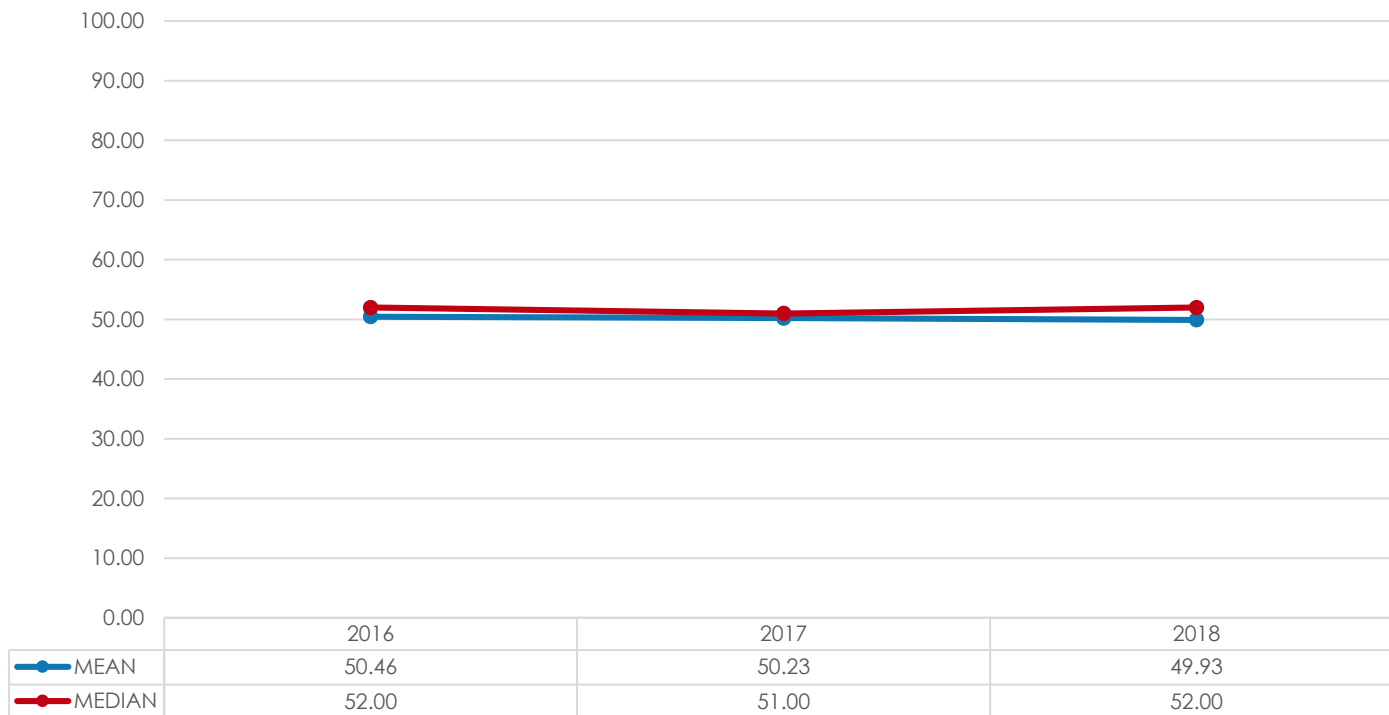
VISITOR PROFILE – GENDER – CANADA



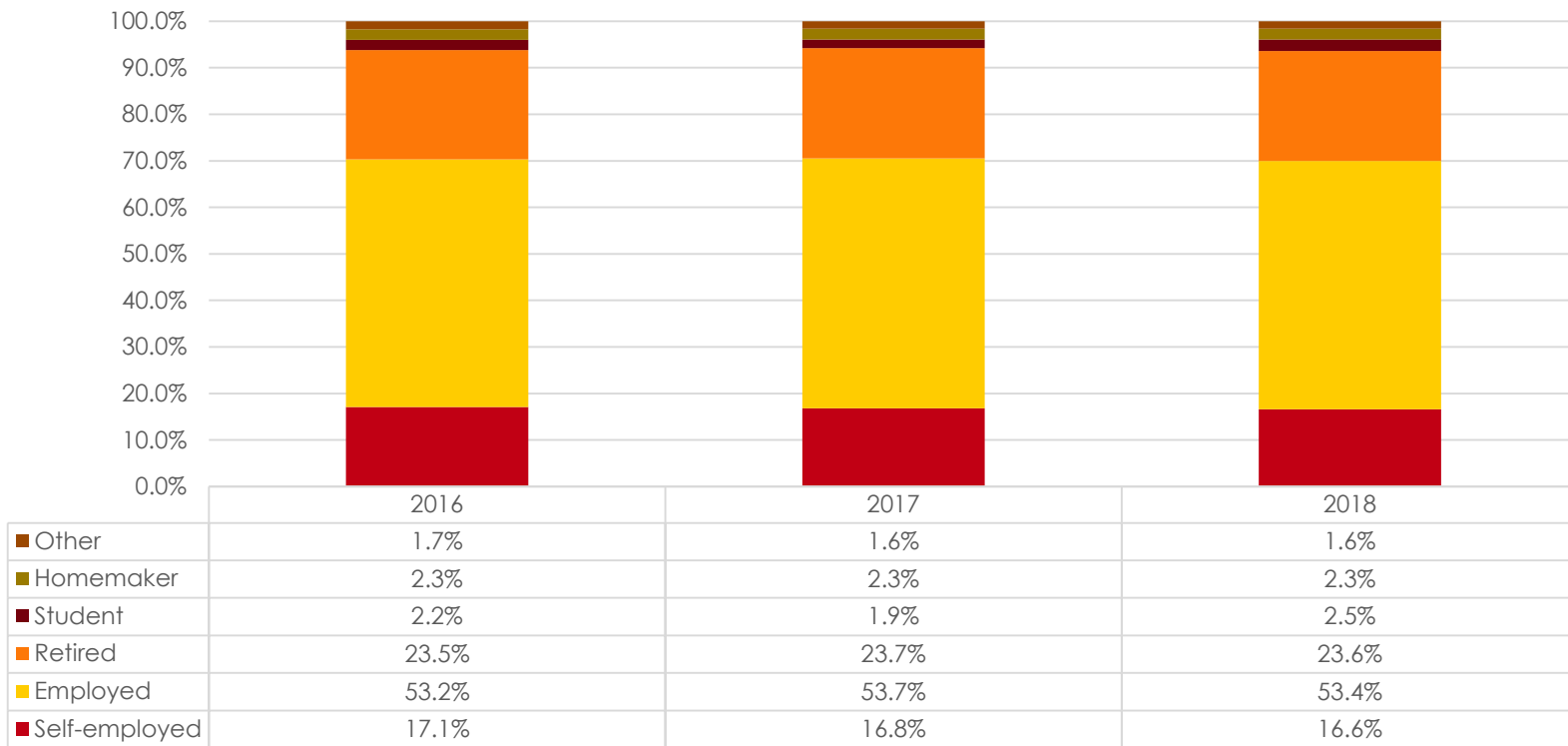
VISITOR PROFILE – EDUCATION – CANADA



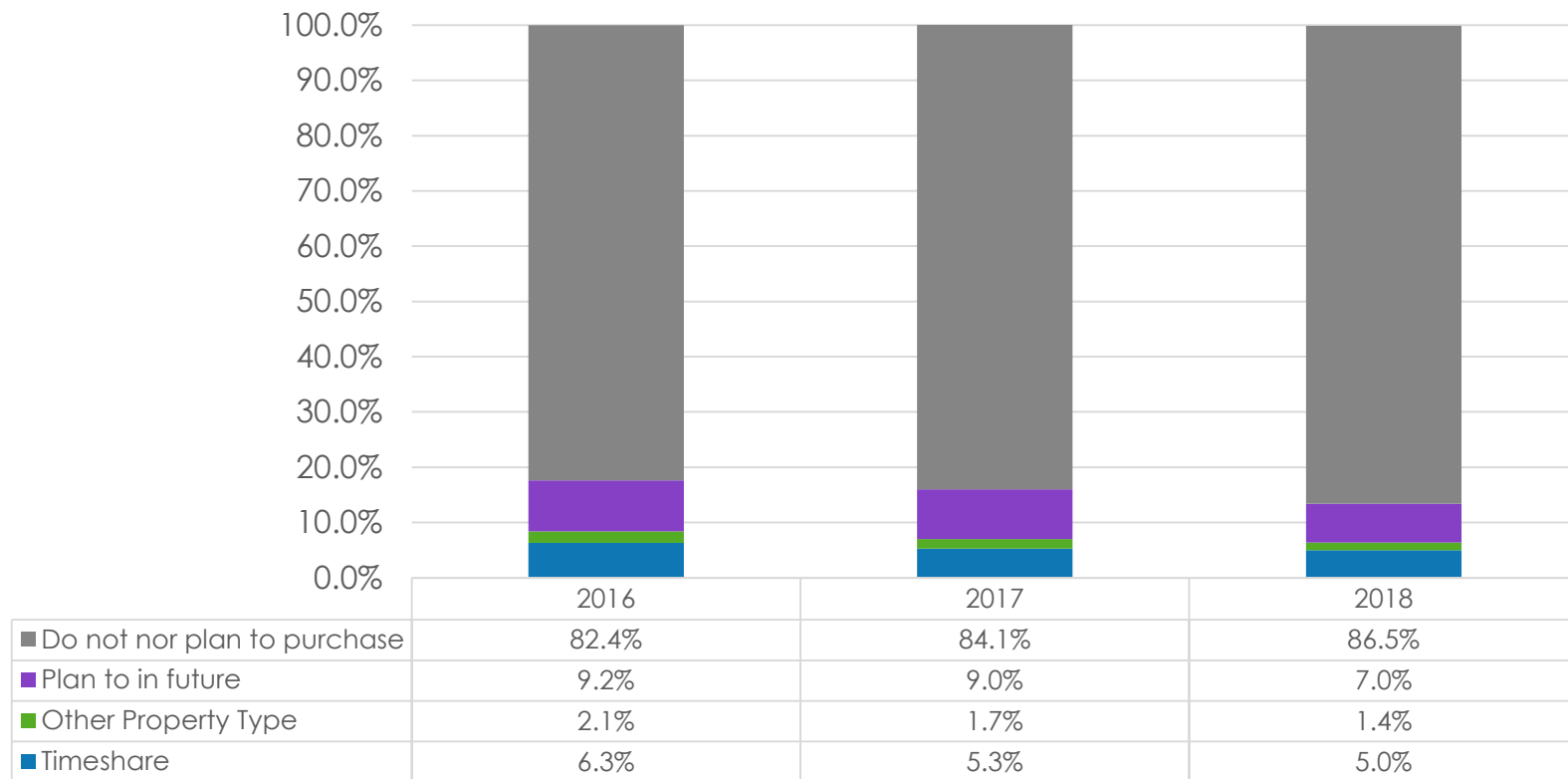
VISITOR PROFILE – AGE – CANADA



VISITOR PROFILE – EMPLOYMENT STATUS – CANADA



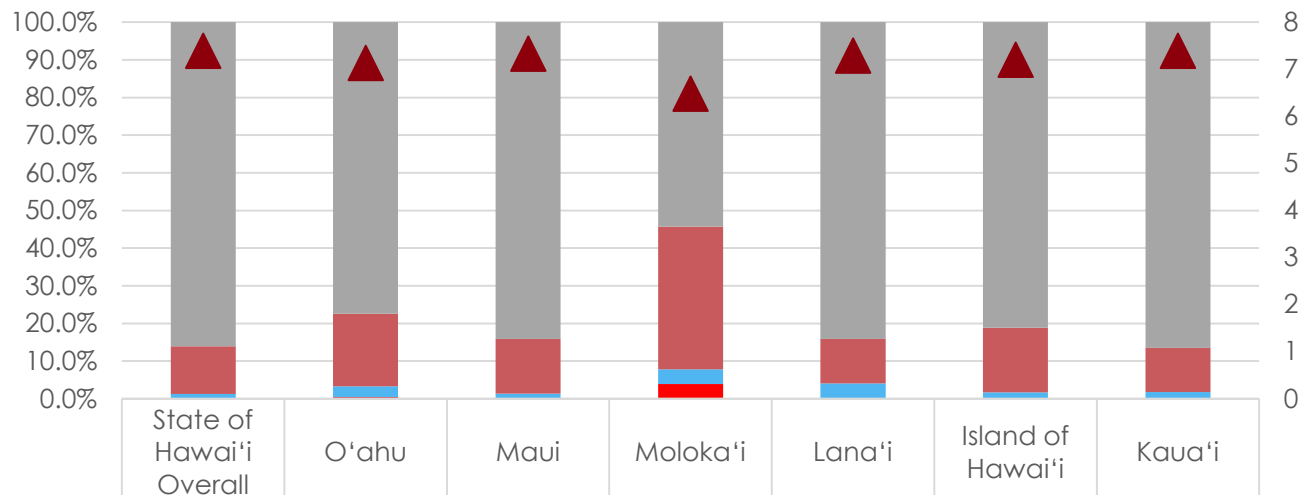
VISITOR PROFILE – HAWAII PROPERTY OWNER – CANADA



SECTION – EUROPE

OVERALL SATISFACTION – MOST RECENT VISIT – EUROPE

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



| | | | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Extremely satisfied (7-8) | 86.1% | 77.5% | 84.1% | 54.3% | 84.1% | 81.1% | 86.5% |
| ■ Somewhat satisfied (5-6) | 12.6% | 19.3% | 14.5% | 37.9% | 11.8% | 17.2% | 11.7% |
| ■ Somewhat dissatisfied (3-4) | 1.1% | 2.9% | 1.4% | 3.9% | 4.1% | 1.5% | 1.8% |
| ■ Not at all satisfied (1-2) | 0.2% | 0.4% | 0.0% | 3.9% | 0.0% | 0.2% | 0.0% |
| BASE | 1,527 | 1,063 | 641 | 27 | 26 | 520 | 403 |
| ▲ MEAN | 7.39 | 7.13 | 7.33 | 6.48 | 7.29 | 7.20 | 7.39 |

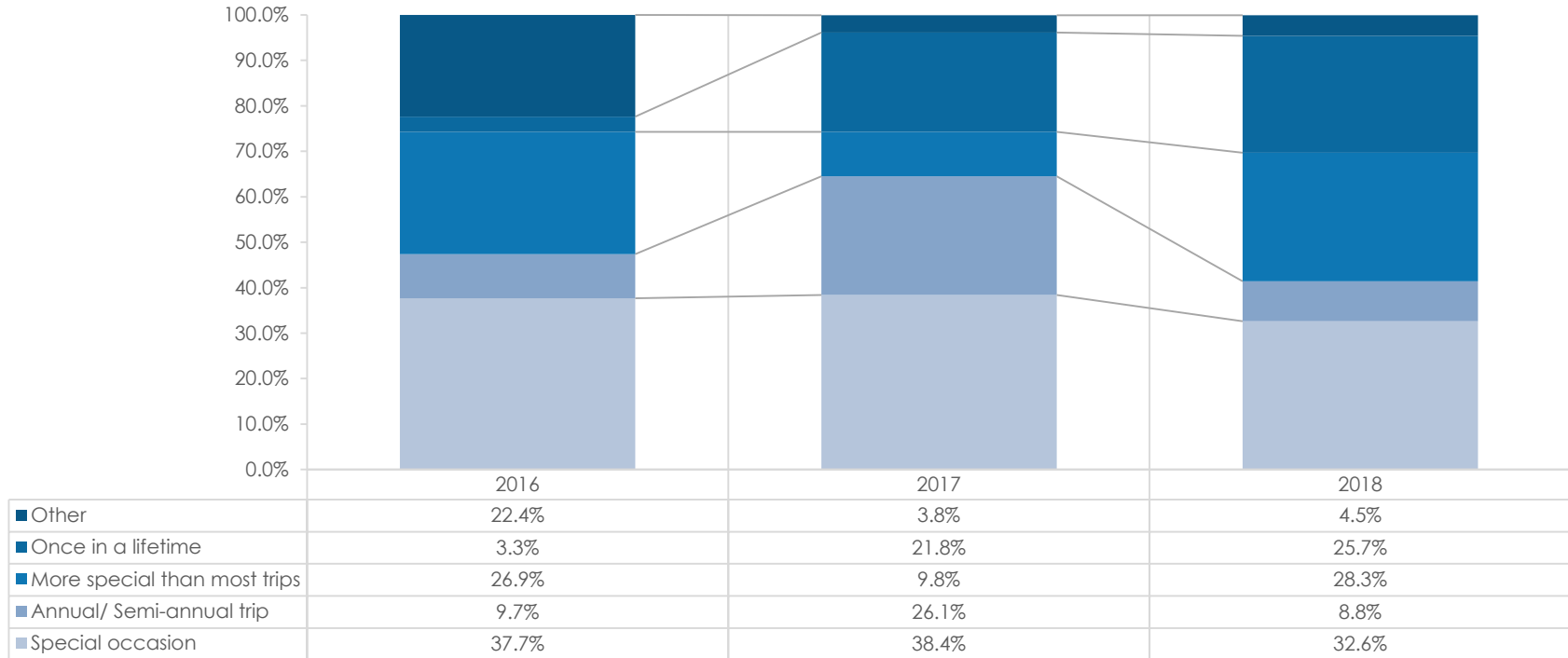
PRIMARY TRIP PURPOSE EUROPE

| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 63.7% | 66.6% |
| Honeymoon | 7.9% | 8.3% |
| Anniversary/ birthday | 7.1% | 5.7% |
| Visit friends/ relatives | 4.9% | 4.2% |
| Convention, conference, seminar | 5.0% | 3.4% |
| Business trip | 1.8% | 1.7% |
| Attend wedding/ vow renewal | 1.8% | 1.6% |
| Family gathering | 0.9% | 1.2% |
| Sporting event | 1.5% | 1.3% |

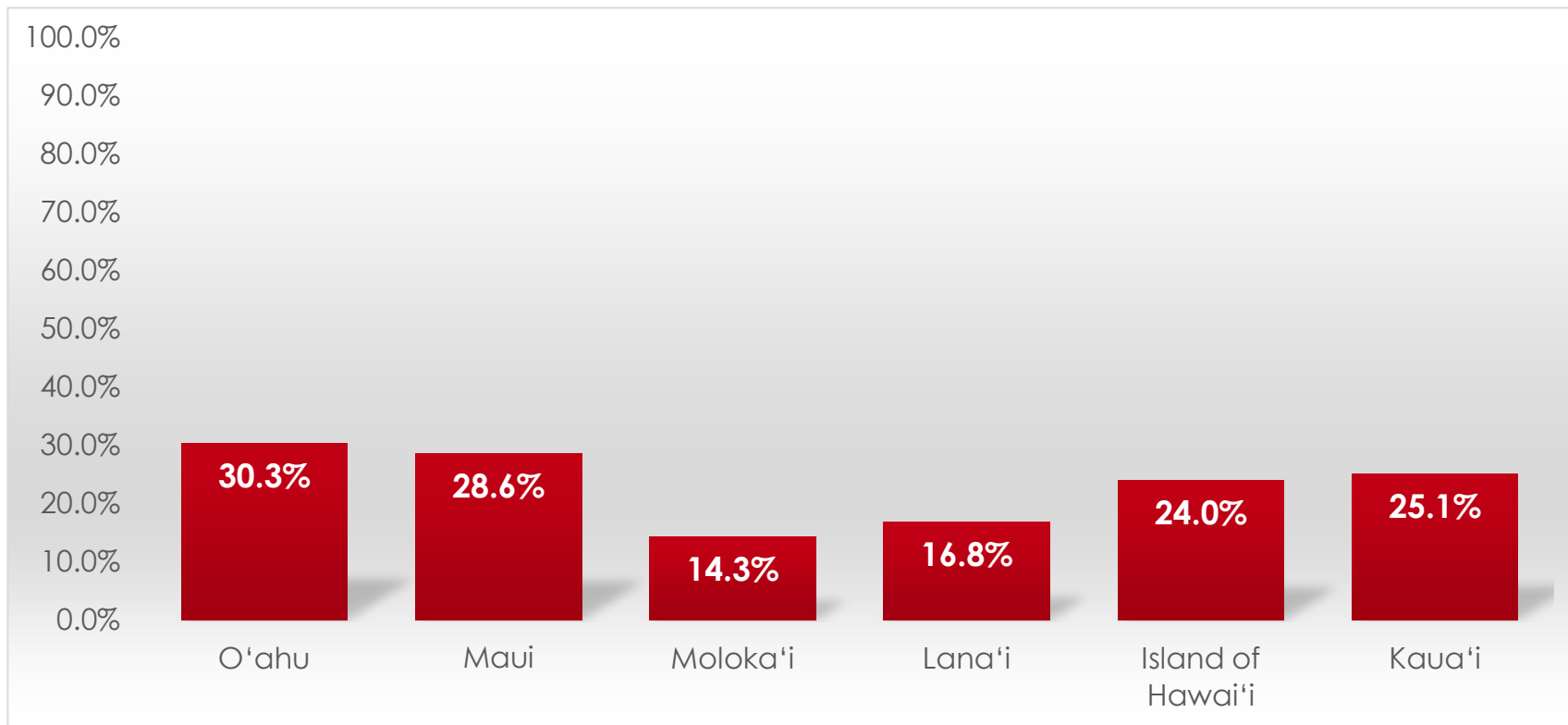
SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE EUROPE

| | 2017 | 2018 |
|---------------------------|-------|-------|
| Vacation | 91.7% | 86.5% |
| Anniversary/ birthday | 18.8% | 12.4% |
| Honeymoon | 9.9% | 9.8% |
| Visit friends/ relatives | 11.6% | 8.7% |
| Family gathering/ reunion | 3.7% | 3.5% |
| Business trip | 2.9% | 2.2% |
| Shopping/ fashion | 4.8% | 2.0% |

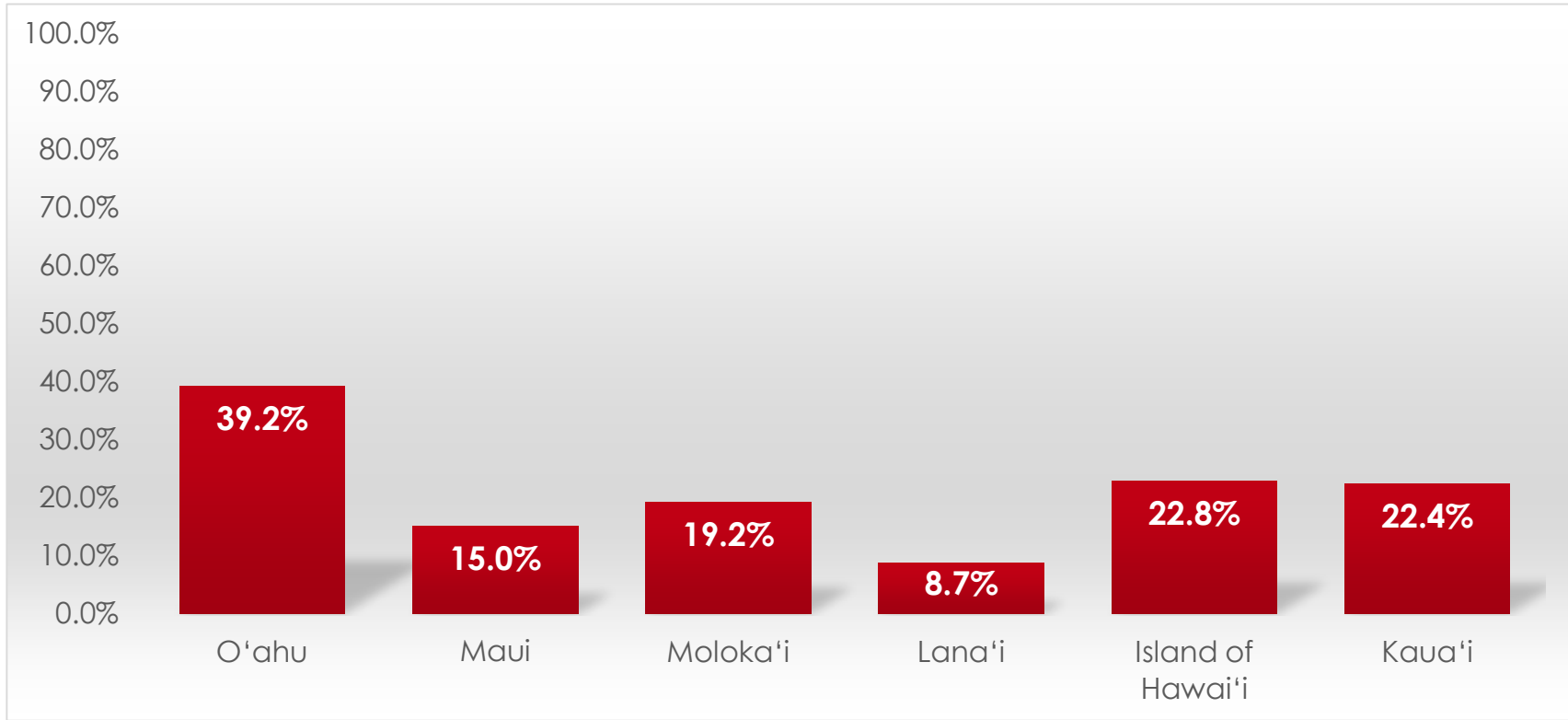
VACATION TRIP DESCRIPTION – EUROPE



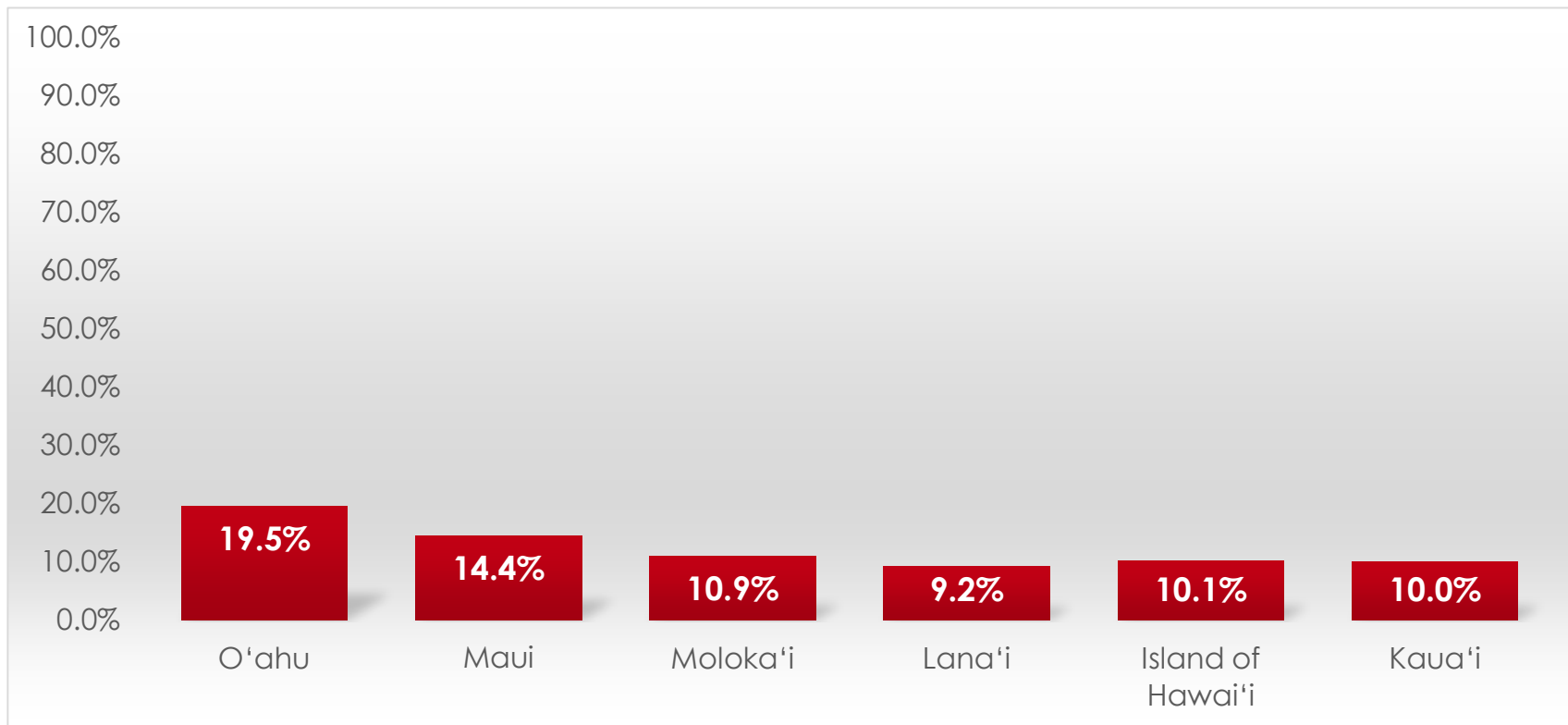
ADVERTISING AWARENESS – EUROPE



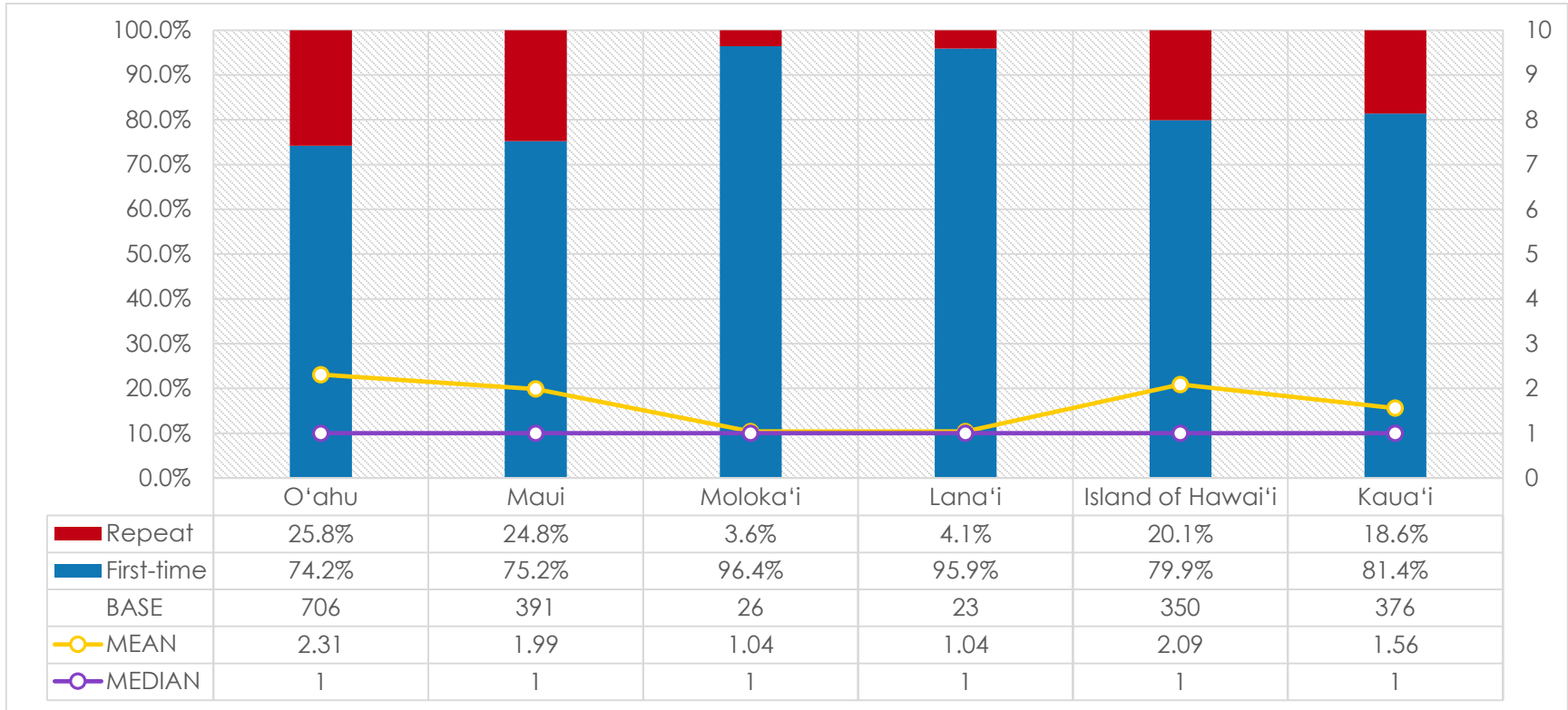
IMPACT OF LOCATION FILMING – EUROPE



IMPACT OF HAWAIIAN MUSIC – EUROPE



1ST TIME VS REPEAT VISITOR – EUROPE

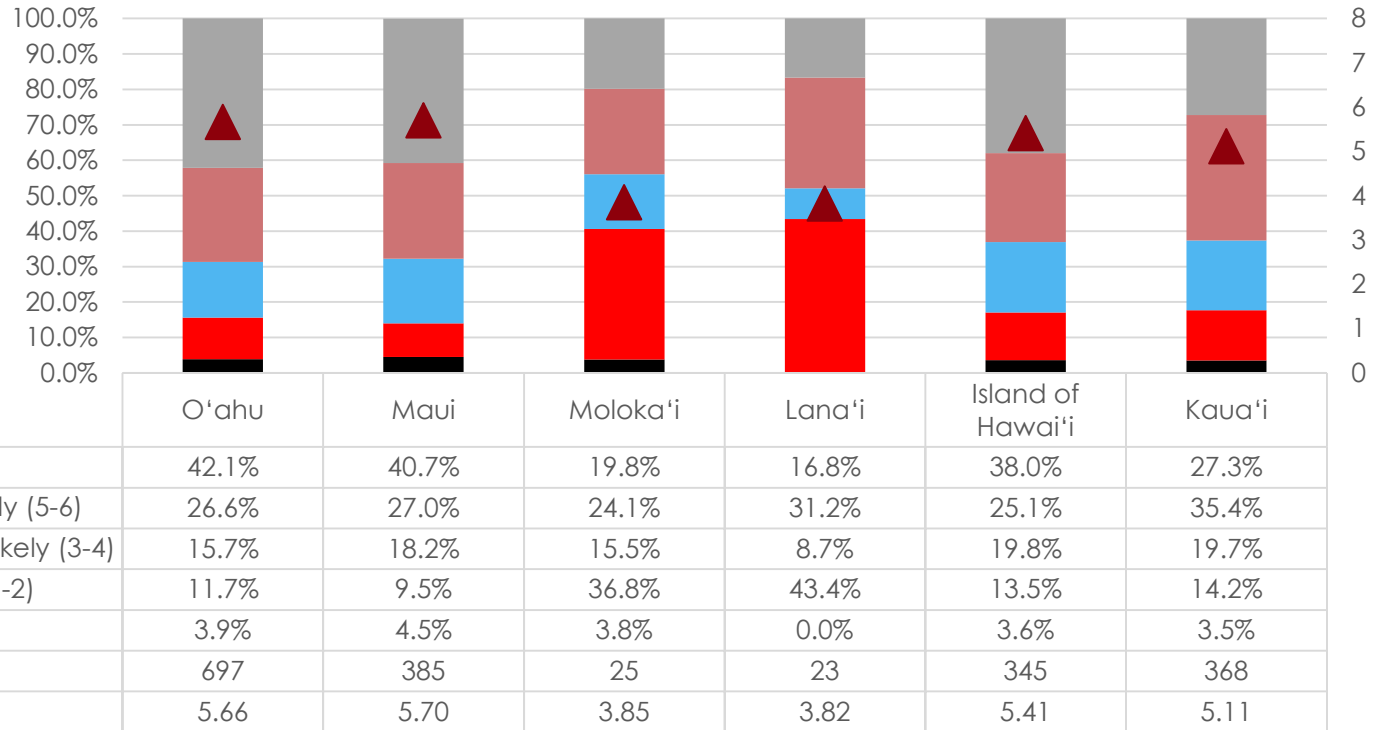


TRAVEL PARTY MEMBERS – EUROPE

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 55.5% | 52.8% | 51.4% |
| Other adult family | 14.7% | 16.7% | 17.1% |
| Child under 18 | 12.8% | 11.6% | 14.1% |
| Friends/ associates | 15.3% | 15.5% | 14.1% |
| Alone | 13.8% | 13.4% | 13.4% |
| Girlfriend/ boyfriend | 11.5% | 11.1% | 12.0% |
| Same-sex partner | .6% | 1.6% | 1.7% |

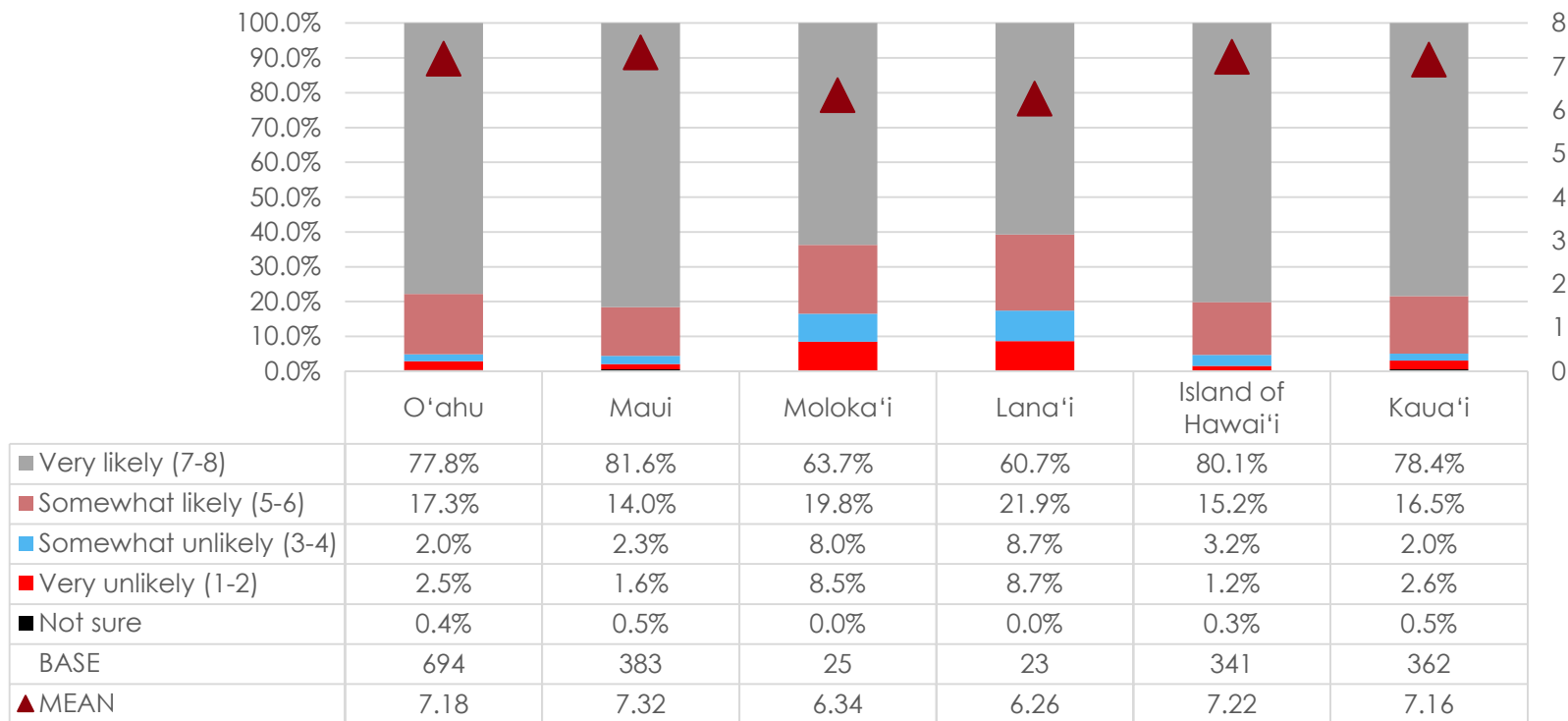
LIKELIHOOD OF RETURN VISIT – EUROPE

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



BRAND/DESTINATION ADVOCACY – EUROPE

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



ACTIVITIES – SIGHTSEEING – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 93.5% | 95.5% | 100.0% | 87.3% | 95.7% | 95.2% |
| On own (self-guided) | 59.4% | 75.7% | 64.7% | 21.9% | 79.9% | 80.1% |
| Helicopter/ airplane | 4.6% | 9.5% | 11.8% | 4.6% | 16.3% | 28.6% |
| Boat/ submarine/ whale | 14.9% | 31.6% | 3.8% | 39.8% | 26.1% | 25.3% |
| Visit towns | 35.1% | 51.5% | 40.1% | 26.0% | 49.0% | 46.0% |
| Limo/ van/ bus tour | 28.2% | 14.0% | 11.8% | 30.6% | 16.6% | 10.3% |
| Scenic views/ natural landmark | 55.7% | 60.4% | 48.6% | 35.2% | 67.2% | 69.3% |
| Movie/ TV/ film location | 13.2% | 0.8% | 3.8% | 0.0% | 2.4% | 4.7% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - EUROPE

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 98.0% | 95.7% |
| On own (self-guided) | 75.5% | 72.3% |
| Helicopter/ airplane | 16.8% | 15.0% |
| Boat/ submarine/ whale | 32.1% | 26.6% |
| Visit towns | 26.7% | 46.3% |
| Limo/ van/ bus tour | 23.1% | 21.3% |
| Scenic views/ natural landmark | 75.8% | 64.4% |
| Movie/ TV/ film location | 9.9% | 7.8% |

ACTIVITIES – RECREATION – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|--|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.5% | 97.6% | 88.2% | 82.7% | 95.7% | 91.9% |
| Beach/ sunbathing | 86.1% | 89.5% | 56.1% | 61.8% | 81.0% | 76.8% |
| Bodyboard/ Standup paddle board | 10.6% | 15.4% | 0.0% | 4.6% | 10.3% | 7.6% |
| Surfing | 13.4% | 13.2% | 0.0% | 4.6% | 6.3% | 6.9% |
| Canoeing/ kayak | 4.9% | 5.2% | 4.3% | 4.6% | 7.6% | 10.8% |
| Swim- ocean | 65.1% | 76.9% | 27.8% | 22.5% | 64.9% | 58.8% |
| Snorkel | 30.2% | 51.4% | 26.8% | 21.4% | 53.0% | 38.1% |
| Windsurf/ Kitesurf | 0.1% | 3.8% | 0.0% | 0.0% | 0.3% | 0.3% |
| Jet ski/ Parasail | 1.0% | 0.3% | 0.0% | 0.0% | 0.6% | 0.0% |
| Scuba | 1.9% | 4.2% | 0.0% | 4.6% | 6.1% | 2.3% |
| Fishing | 1.1% | 1.5% | 0.0% | 0.0% | 1.4% | 0.3% |
| Golf | 1.4% | 3.4% | 0.0% | 4.1% | 2.9% | 1.6% |

STATEWIDE - ACTIVITIES – RECREATION – EUROPE

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 97.5% | 96.5% |
| Beach/ sunbathing | 88.5% | 86.3% |
| Bodyboard/ Standup paddle board | 15.5% | 12.5% |
| Surfing | 12.9% | 12.1% |
| Canoeing/ kayak | 7.1% | 7.9% |
| Swim- ocean | NA | 69.5% |
| Snorkel | NA | 43.8% |
| Windsurf/ Kitesurf | 1.5% | 1.1% |
| Jet ski/ Parasail | 0.9% | 0.7% |
| Scuba | 5.7% | 3.8% |
| Fishing | 1.3% | 1.3% |
| Golf | 4.4% | 2.4% |

ACTIVITIES – RECREATION – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.5% | 97.6% | 88.2% | 82.7% | 95.7% | 91.9% |
| Run/ Jog/ Fitness walk | 19.0% | 19.6% | 8.0% | 4.6% | 17.5% | 12.7% |
| Spa | 5.0% | 5.8% | 0.0% | 0.0% | 5.3% | 3.6% |
| Hiking/Backpack/Camp | 20.9% | 22.5% | 16.5% | 4.1% | 29.9% | 31.4% |
| Agritourism | 11.3% | 7.0% | 4.3% | 4.1% | 12.2% | 4.3% |
| Sport event/ tournament | 1.8% | 1.8% | 0.0% | 0.0% | 4.3% | 0.5% |
| Park/ botanical garden | 36.1% | 35.4% | 25.0% | 4.6% | 44.3% | 38.6% |
| Waterpark | 3.6% | 1.8% | 3.8% | 0.0% | 3.3% | 1.4% |
| Mountain tube/ waterfall rappel | 2.8% | 4.2% | 8.5% | 0.0% | 2.3% | 4.7% |
| Zip-lining | 1.4% | 4.4% | 0.0% | 0.0% | 2.4% | 2.8% |
| Skydiving | 1.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.5% |
| All terrain vehicle (ATV) | 1.5% | 1.0% | 4.3% | 4.1% | 4.2% | 5.0% |
| Horseback riding | 1.6% | 1.8% | 0.0% | 0.0% | 1.2% | 1.4% |

STATEWIDE - ACTIVITIES – RECREATION – EUROPE

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 97.5% | 96.5% |
| Run/ Jog/ Fitness walk | 29.4% | 19.1% |
| Spa | 8.0% | 5.6% |
| Hiking/Backpack/Camp | 26.3% | 26.9% |
| Agritourism | 8.4% | 10.5% |
| Sport event/ tournament | 3.7% | 2.4% |
| Park/ botanical garden | 43.3% | 40.9% |
| Waterpark | NA | 3.1% |
| Mountain tube/ waterfall rappel | NA | 3.8% |
| Zip-lining | NA | 3.0% |
| Skydiving | NA | 0.8% |
| All terrain vehicle (ATV) | NA | 3.3% |
| Horseback riding | NA | 1.7% |

ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|--|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 98.1% | 96.5% | 88.2% | 82.7% | 99.4% | 93.0% |
| Lunch/ sunset/ dinner/ evening cruise | 26.3% | 27.6% | 27.8% | 22.5% | 27.2% | 26.6% |
| Live music/ stage show | 30.2% | 28.2% | 23.6% | 4.6% | 25.1% | 20.1% |
| Nightclub/ dancing/ bar/ karaoke | 11.4% | 4.8% | 0.0% | 4.6% | 5.4% | 1.7% |
| Fine dining | 38.7% | 45.8% | 23.6% | 8.7% | 36.1% | 33.1% |
| Family restaurant | 49.1% | 48.9% | 19.3% | 13.3% | 49.5% | 36.3% |
| Fast food | 54.5% | 36.4% | 32.6% | 8.1% | 40.6% | 31.3% |
| Food truck | 28.1% | 18.6% | 8.0% | 0.0% | 21.2% | 27.2% |
| Café/ coffee house | 52.8% | 45.5% | 48.1% | 26.0% | 57.0% | 42.1% |
| Ethnic dining | 18.6% | 15.9% | 11.3% | 4.6% | 14.9% | 14.9% |
| Prepared own meal | 25.3% | 40.5% | 27.3% | 26.0% | 41.3% | 37.1% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 98.5% | 97.1% |
| Lunch/ sunset/ dinner/ evening cruise | 35.7% | 29.9% |
| Live music/ stage show | 31.8% | 30.7% |
| Nightclub/ dancing/ bar/ karaoke | 10.3% | 8.1% |
| Fine dining | 44.6% | 40.6% |
| Family restaurant | 55.5% | 48.8% |
| Fast food | 46.6% | 46.4% |
| Food truck | NA | 25.9% |
| Café/ coffee house | 54.1% | 53.0% |
| Ethnic dining | 21.2% | 18.6% |
| Prepared own meal | 42.9% | 37.6% |

ACTIVITIES – SHOPPING – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.8% | 95.8% | 75.9% | 52.0% | 96.8% | 93.2% |
| Mall/ department store | 71.9% | 54.3% | 8.0% | 9.2% | 46.5% | 32.3% |
| Designer boutique | 20.0% | 16.5% | 0.0% | 4.6% | 11.9% | 11.7% |
| Hotel/ resort store | 34.1% | 28.1% | 8.5% | 4.1% | 26.0% | 14.0% |
| Swap meet/ flea market | 7.6% | 4.8% | 0.0% | 0.0% | 6.4% | 2.5% |
| Discount/ outlet store | 24.4% | 20.6% | 0.0% | 4.6% | 15.4% | 6.5% |
| Supermarket | 60.8% | 69.2% | 60.4% | 4.1% | 74.6% | 70.0% |
| Farmer's market | 19.2% | 19.2% | 23.6% | 4.6% | 39.4% | 34.5% |
| Convenience store | 45.6% | 26.6% | 11.8% | 4.6% | 32.6% | 18.0% |
| Duty free store | 10.4% | 4.2% | 0.0% | 0.0% | 4.5% | 1.3% |
| Local shop/ artisan | 51.8% | 57.0% | 35.8% | 34.7% | 63.2% | 58.1% |

STATEWIDE - ACTIVITIES – SHOPPING – EUROPE

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 96.7% | 95.6% |
| Mall/ department store | 63.5% | 58.6% |
| Designer boutique | 19.6% | 17.7% |
| Hotel/ resort store | 29.0% | 30.7% |
| Swap meet/ flea market | 11.9% | 6.7% |
| Discount/ outlet store | 24.5% | 20.0% |
| Supermarket | 64.1% | 70.2% |
| Farmer's market | 29.9% | 28.9% |
| Convenience store | 33.4% | 36.0% |
| Duty free store | 6.4% | 6.9% |
| Local shop/ artisan | 62.8% | 59.1% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---|-------|-------|----------|--------|------------------|--------|
| TOTAL | 80.6% | 62.0% | 47.6% | 51.5% | 70.2% | 56.7% |
| Historic military site | 58.1% | 3.4% | 0.0% | 8.1% | 21.2% | 6.0% |
| Other historical site | 26.0% | 21.2% | 19.8% | 17.3% | 37.8% | 24.7% |
| Museum/ art gallery | 13.4% | 15.4% | 7.5% | 16.8% | 18.5% | 9.9% |
| Luau/ Polynesian show/ hula show | 33.4% | 32.4% | 11.8% | 17.9% | 25.5% | 21.9% |
| Lesson- ex. ukulele, hula, canoe, lei making | 10.2% | 6.5% | 0.0% | 4.6% | 5.4% | 3.9% |
| Play/ concert/ theatre | 6.0% | 3.5% | 0.0% | 0.0% | 4.7% | 3.5% |
| Art/ craft fair | 5.7% | 8.3% | 3.8% | 4.6% | 10.2% | 9.3% |
| Festival event | 4.3% | 3.1% | 8.5% | 4.1% | 4.0% | 2.8% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 77.3% | 74.8% |
| Historic military site | 43.2% | 33.2% |
| Other historical site | 34.1% | 29.5% |
| Museum/ art gallery | 19.2% | 15.5% |
| Luau/ Polynesian show/ hula show | 36.2% | 34.2% |
| Lesson- ex. ukulele, hula, canoe, lei making | 5.7% | 8.1% |
| Play/ concert/ theatre | 4.8% | 5.5% |
| Art/ craft fair | 7.6% | 9.0% |
| Festival event | 8.1% | 4.7% |

ACTIVITIES – TRANSPORTATION – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 95.4% | 95.1% | 80.2% | 61.2% | 96.6% | 93.3% |
| Airport shuttle | 31.8% | 22.0% | 7.5% | 13.8% | 21.2% | 14.6% |
| Trolley | 10.8% | 2.9% | 3.8% | 0.0% | 4.9% | 2.0% |
| Public bus | 29.5% | 9.3% | 3.8% | 0.0% | 12.2% | 2.6% |
| Tour bus/ tour van | 26.8% | 12.5% | 7.5% | 36.3% | 15.8% | 11.7% |
| Taxi/ limo | 35.5% | 16.4% | 11.8% | 20.9% | 19.6% | 9.0% |
| Rental car | 40.7% | 73.9% | 64.7% | 4.1% | 78.0% | 75.7% |
| Ride share | 15.8% | 7.6% | 0.0% | 0.0% | 11.8% | 1.7% |
| Bicycle rental | 2.8% | 1.3% | 0.0% | 4.6% | 3.8% | 2.5% |

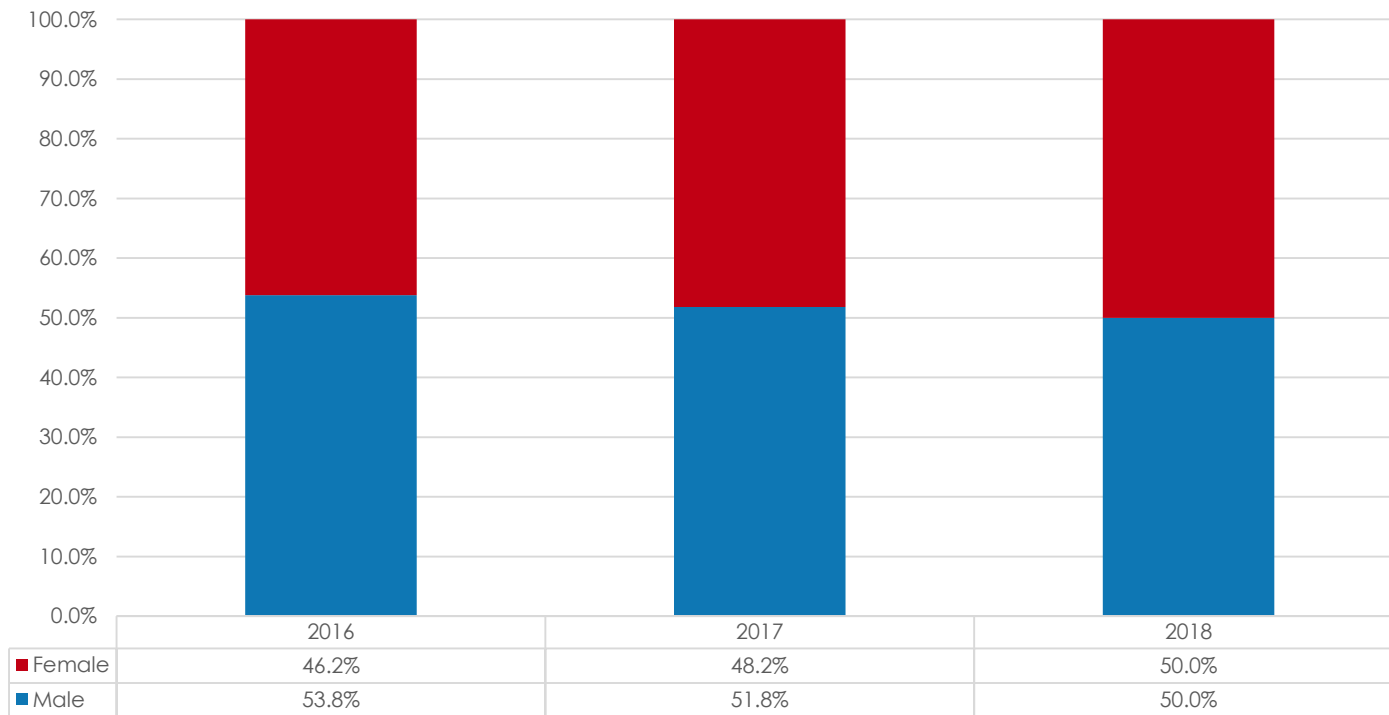
STATEWIDE - ACTIVITIES – TRANSPORTATION – EUROPE

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 98.0% | 94.4% |
| Airport shuttle | 31.7% | 26.8% |
| Trolley | 7.8% | 7.2% |
| Public bus | 19.8% | 18.7% |
| Tour bus/ tour van | 18.2% | 20.3% |
| Taxi/ limo | 31.6% | 25.9% |
| Rental car | 66.5% | 62.4% |
| Ride share | NA | 11.9% |
| Bicycle rental | NA | 3.3% |

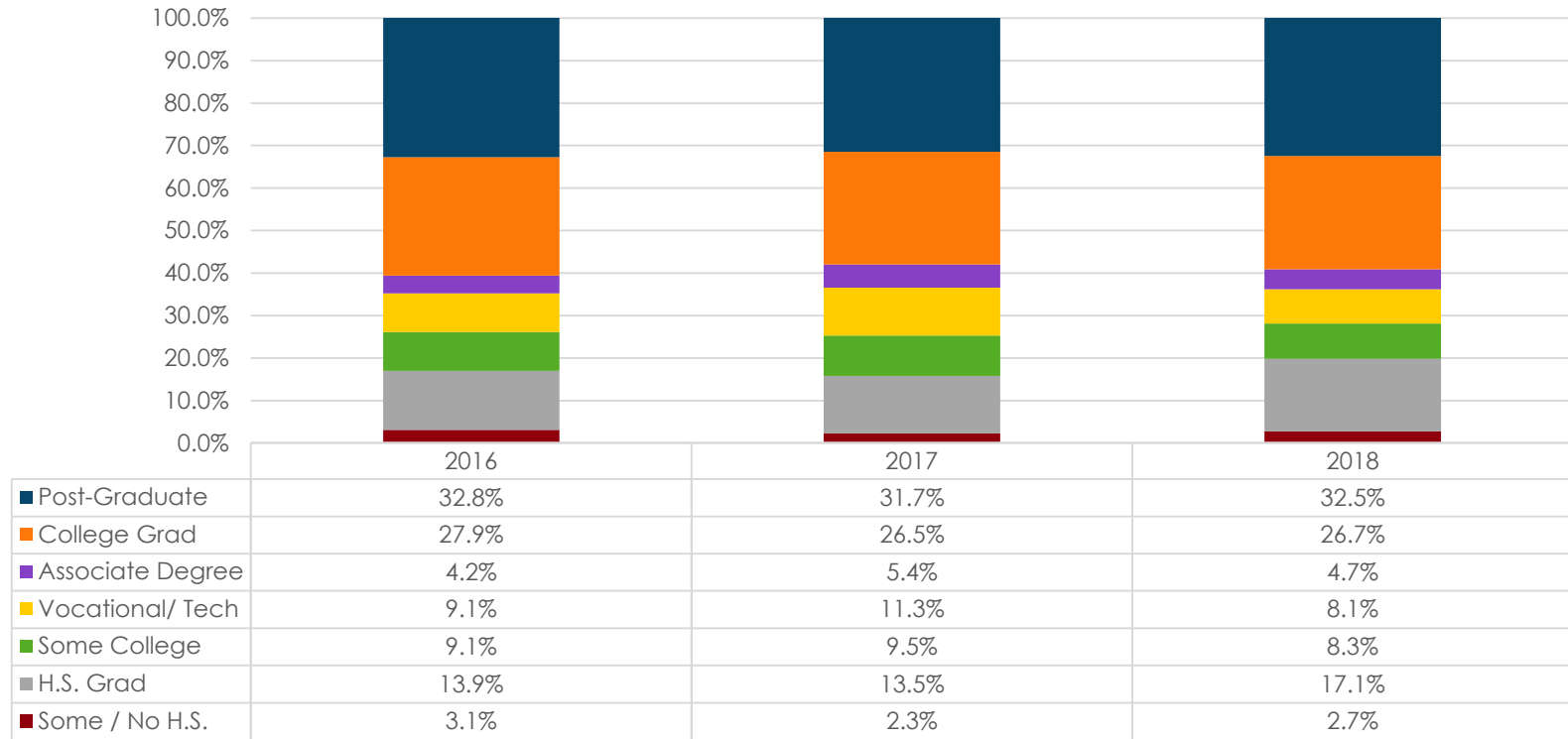
ACTIVITIES – OTHER – EUROPE

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 16.3% | 12.8% | 0.0% | 4.1% | 13.7% | 9.1% |
| Visit friends/ family | 14.3% | 9.9% | 0.0% | 0.0% | 13.5% | 7.5% |
| Volunteer- non-profit | 2.1% | 3.1% | 0.0% | 4.1% | 0.3% | 1.9% |

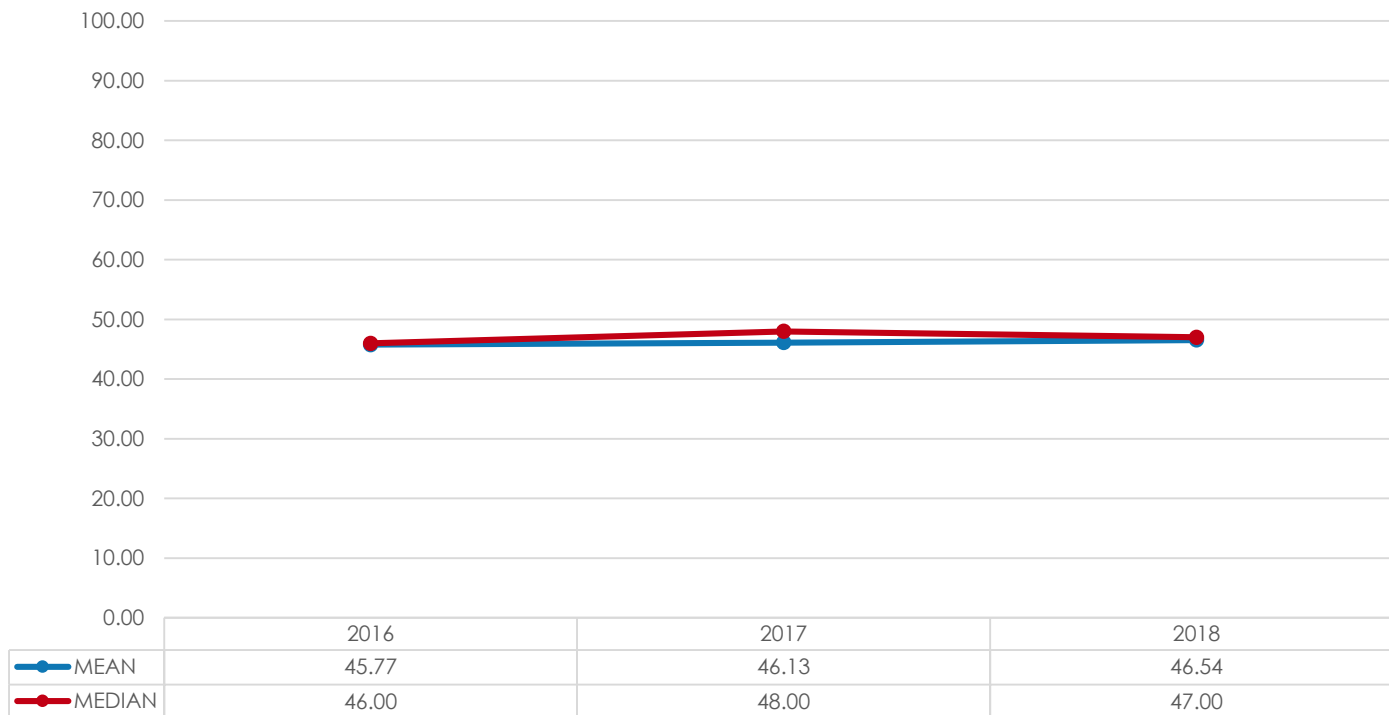
VISITOR PROFILE – GENDER – EUROPE



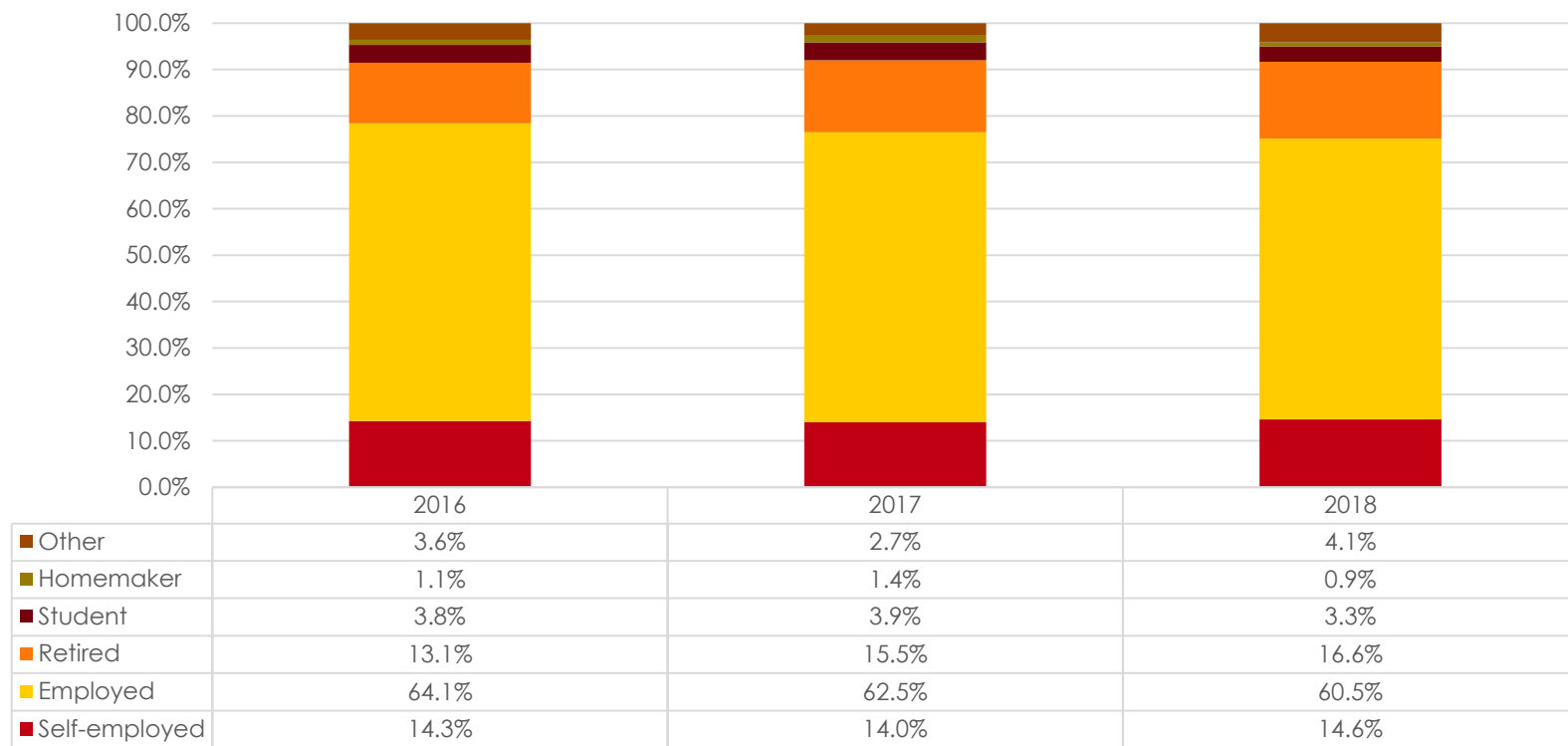
VISITOR PROFILE – EDUCATION – EUROPE



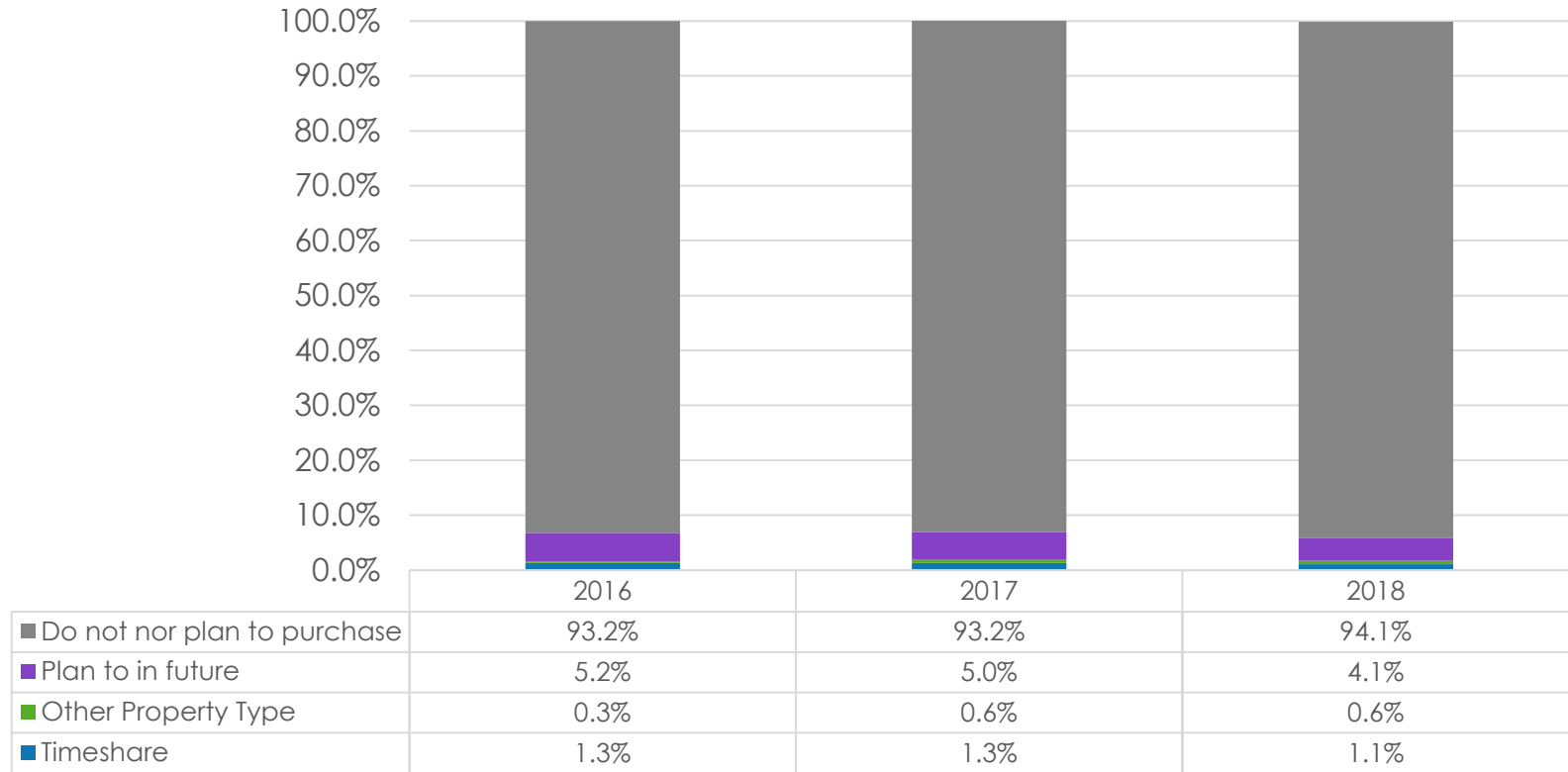
VISITOR PROFILE – AGE – EUROPE



VISITOR PROFILE – EMPLOYMENT STATUS – EUROPE



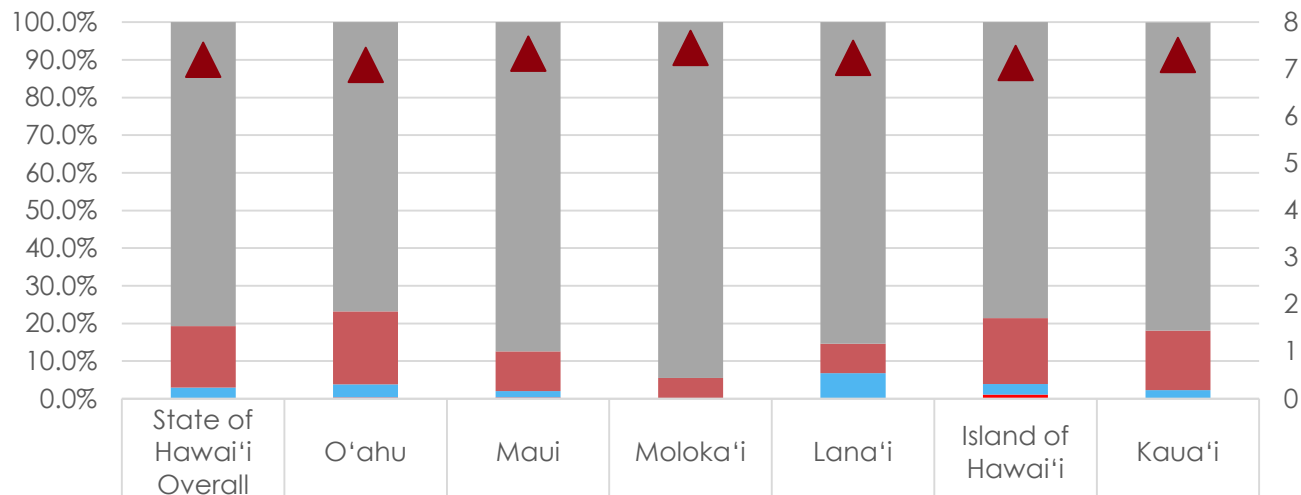
VISITOR PROFILE – HAWAII PROPERTY OWNER – EUROPE



SECTION – OCEANIA

OVERALL SATISFACTION – MOST RECENT VISIT – OCEANIA

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



| | | | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Extremely satisfied (7-8) | 80.7% | 76.8% | 87.4% | 94.5% | 85.4% | 78.7% | 81.8% |
| ■ Somewhat satisfied (5-6) | 16.3% | 19.4% | 10.6% | 5.5% | 7.8% | 17.5% | 15.8% |
| ■ Somewhat dissatisfied (3-4) | 2.8% | 3.5% | 1.7% | 0.0% | 6.8% | 2.8% | 2.3% |
| ■ Not at all satisfied (1-2) | 0.2% | 0.3% | 0.3% | 0.0% | 0.0% | 1.1% | 0.0% |
| BASE | 2,228 | 2,139 | 350 | 16 | 26 | 271 | 211 |
| ▲ MEAN | 7.20 | 7.09 | 7.33 | 7.45 | 7.24 | 7.13 | 7.30 |

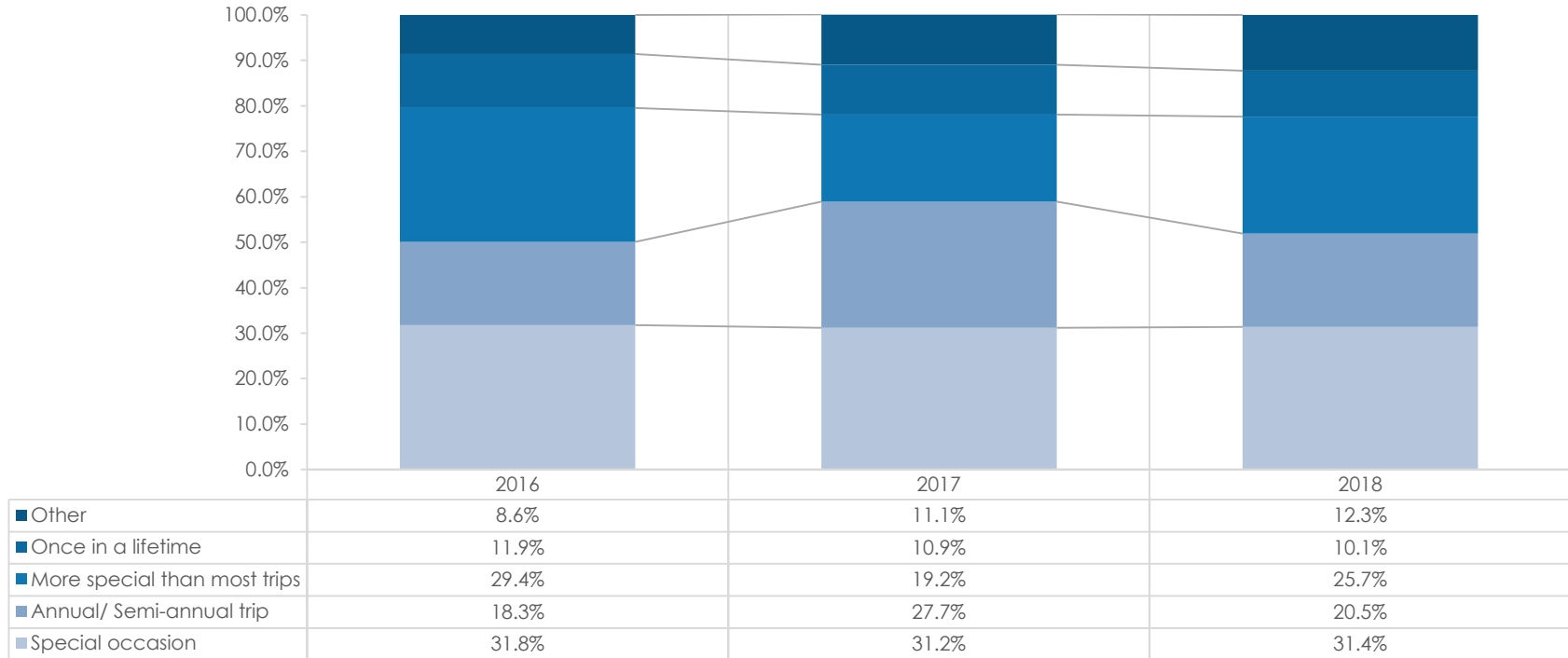
PRIMARY TRIP PURPOSE OCEANIA

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| Vacation | 80.9% | 73.8% |
| Layover/ break up long flight | 2.4% | 9.9% |
| Anniversary/ birthday | 6.3% | 5.7% |
| Honeymoon | 3.1% | 2.4% |
| Visit friends or relatives | 1.8% | 2.2% |
| Family gathering/ reunion | 0.6% | 1.2% |
| Attend wedding/ vow renewal | 0.3% | 1.1% |

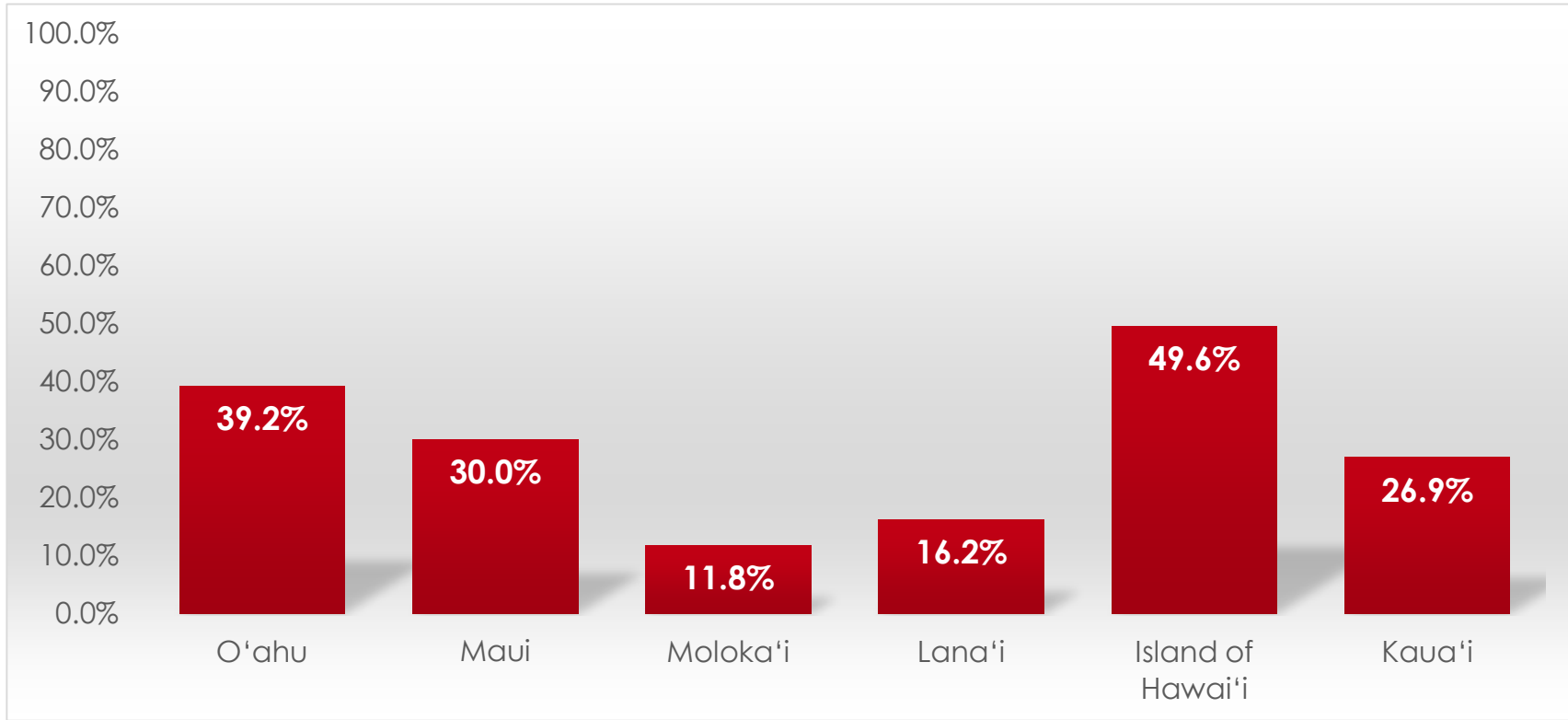
SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE OCEANIA

| | 2017 | 2018 |
|-----------------------------|-------|-------|
| Vacation | 96.3% | 89.8% |
| Layover/ break up long trip | 9.7% | 20.5% |
| Anniversary/ birthday | 16.0% | 12.1% |
| Shopping/ fashion | 20.3% | 9.2% |
| Visit friends/ relatives | 5.2% | 4.2% |
| Family gathering/ reunion | 4.6% | 3.0% |
| Honeymoon | 3.7% | 2.9% |

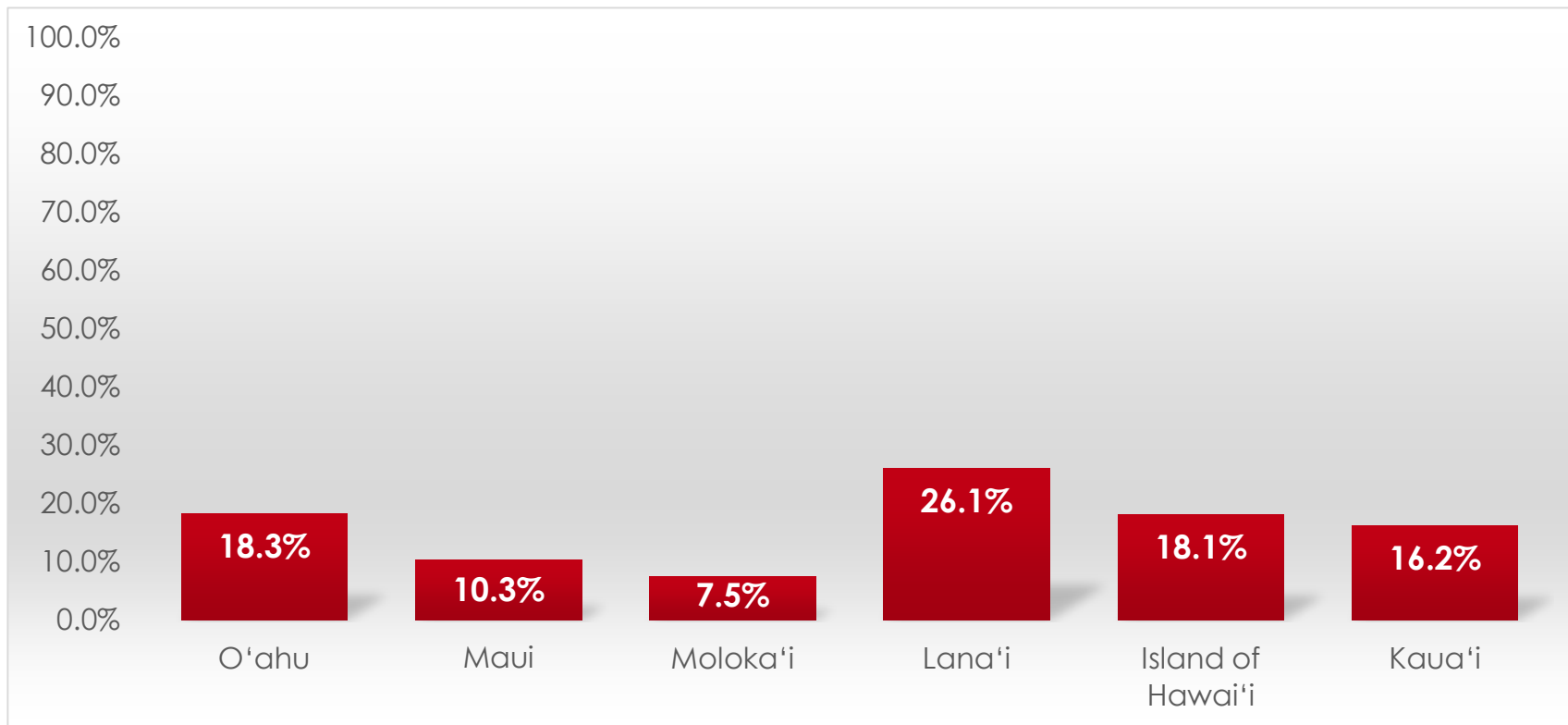
VACATION TRIP DESCRIPTION – OCEANIA



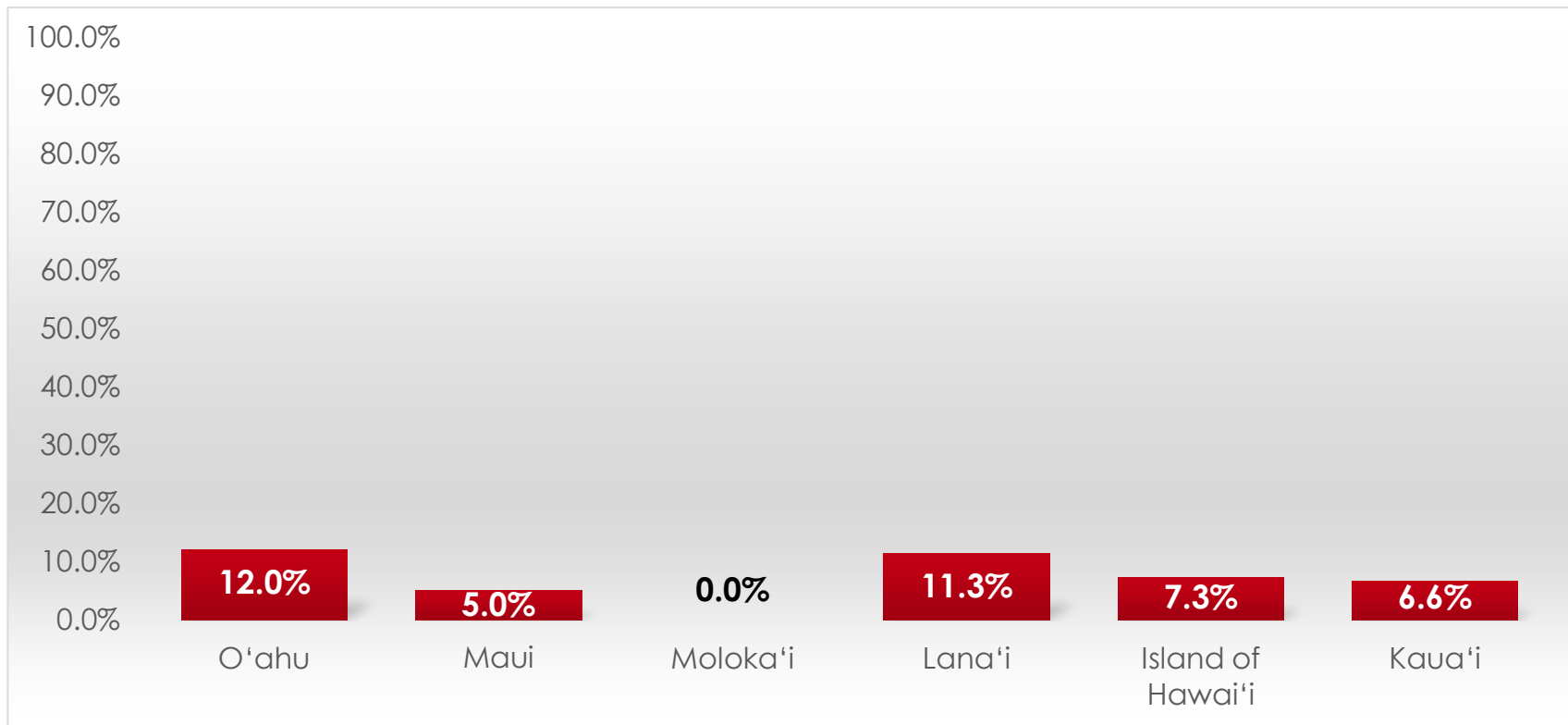
ADVERTISING AWARENESS – OCEANIA



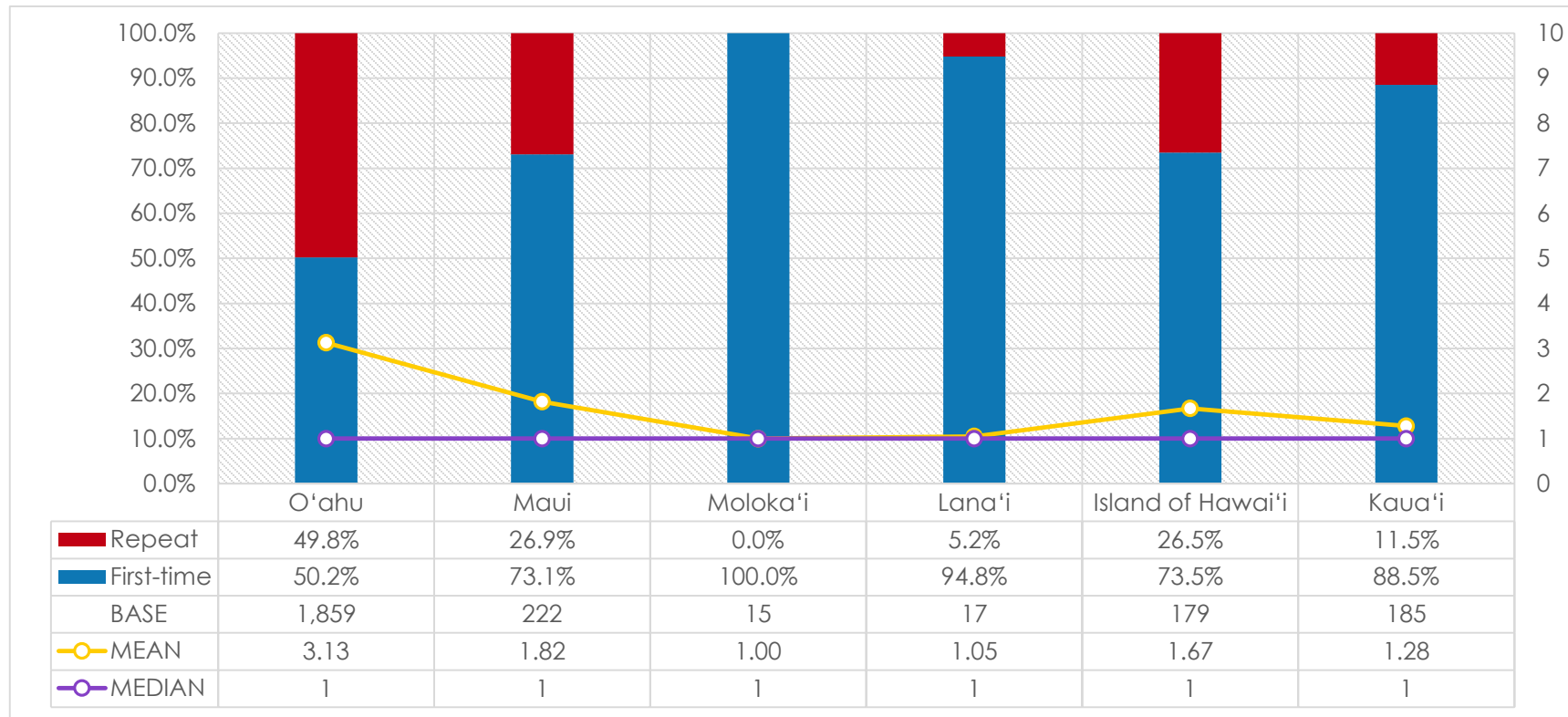
IMPACT OF LOCATION FILMING – OCEANIA



IMPACT OF HAWAIIAN MUSIC – OCEANIA



1ST TIME VS REPEAT VISITOR – OCEANIA

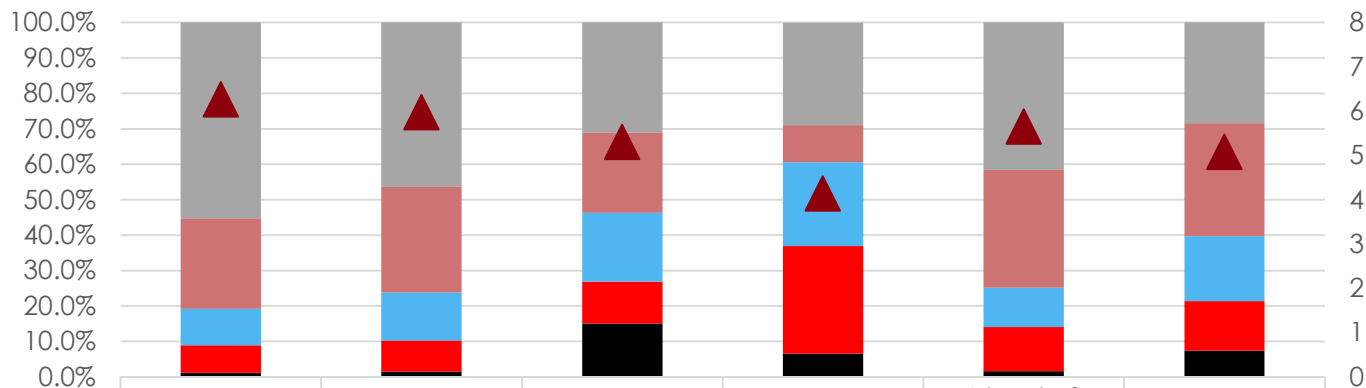


TRAVEL PARTY MEMBERS – OCEANIA

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 67.5% | 67.7% | 66.8% |
| Other adult family | 21.5% | 22.2% | 22.3% |
| Child under 18 | 22.4% | 25.2% | 23.1% |
| Friends/ associates | 16.0% | 15.9% | 15.7% |
| Alone | 7.0% | 7.2% | 7.1% |
| Girlfriend/ boyfriend | 4.7% | 4.5% | 4.1% |
| Same-sex partner | 1.1% | 1.0% | 1.1% |

LIKELIHOOD OF RETURN VISIT – OCEANIA

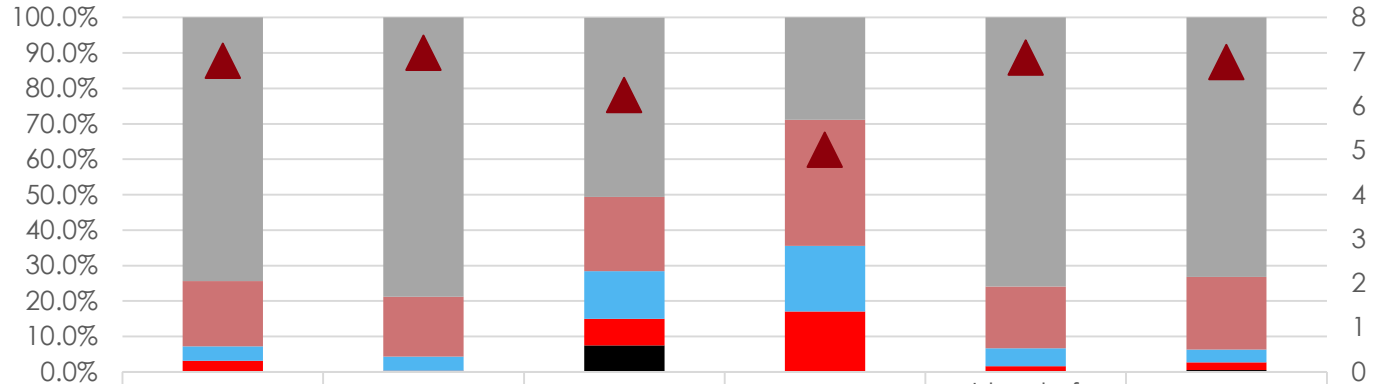
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 55.2% | 46.5% | 31.2% | 28.9% | 41.6% | 28.4% |
| ■ Somewhat likely (5-6) | 25.6% | 29.8% | 22.6% | 10.4% | 33.2% | 31.9% |
| ■ Somewhat unlikely (3-4) | 10.3% | 13.5% | 19.4% | 23.7% | 11.1% | 18.3% |
| ■ Very unlikely (1-2) | 7.7% | 8.8% | 11.8% | 30.3% | 12.5% | 14.0% |
| ■ Not sure | 1.2% | 1.5% | 15.1% | 6.6% | 1.6% | 7.4% |
| BASE | 1,844 | 219 | 15 | 17 | 178 | 185 |
| ▲ MEAN | 6.26 | 5.97 | 5.30 | 4.14 | 5.65 | 5.08 |

BRAND/DESTINATION ADVOCACY – OCEANIA

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 74.4% | 78.8% | 50.5% | 28.9% | 75.9% | 73.3% |
| ■ Somewhat likely (5-6) | 18.4% | 16.9% | 21.0% | 35.5% | 17.4% | 20.5% |
| ■ Somewhat unlikely (3-4) | 4.0% | 3.9% | 13.4% | 18.5% | 5.1% | 3.6% |
| ■ Very unlikely (1-2) | 2.9% | 0.4% | 7.5% | 17.1% | 1.6% | 2.2% |
| ■ Not sure | 0.3% | 0.0% | 7.5% | 0.0% | 0.0% | 0.5% |
| BASE | 1,829 | 217 | 15 | 17 | 178 | 184 |
| ▲ MEAN | 7.02 | 7.20 | 6.25 | 5.01 | 7.09 | 6.99 |

ACTIVITIES – SIGHTSEEING – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 90.9% | 93.3% | 94.1% | 77.7% | 95.4% | 97.7% |
| On own (self-guided) | 44.0% | 58.6% | 44.6% | 5.2% | 64.3% | 54.2% |
| Helicopter/ airplane | 5.1% | 7.7% | 13.4% | 6.6% | 25.5% | 16.4% |
| Boat/ submarine/ whale | 15.4% | 27.3% | 5.9% | 18.5% | 23.1% | 16.4% |
| Visit towns | 25.9% | 45.0% | 19.4% | 13.3% | 45.7% | 43.6% |
| Limo/ van/ bus tour | 37.1% | 17.7% | 13.4% | 28.9% | 27.5% | 24.4% |
| Scenic views/ natural landmark | 48.6% | 52.5% | 38.7% | 31.8% | 57.3% | 59.5% |
| Movie/ TV/ film location | 9.8% | 0.8% | 0.0% | 13.3% | 5.5% | 9.4% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - OCEANIA

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 92.9% | 92.3% |
| On own (self-guided) | 46.8% | 48.7% |
| Helicopter/ airplane | 7.2% | 8.2% |
| Boat/ submarine/ whale | 20.0% | 18.7% |
| Visit towns | 20.2% | 31.4% |
| Limo/ van/ bus tour | 35.9% | 35.9% |
| Scenic views/ natural landmark | 62.9% | 51.7% |
| Movie/ TV/ film location | 8.4% | 9.6% |

ACTIVITIES – RECREATION – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.5% | 91.5% | 79.0% | 74.9% | 92.8% | 90.5% |
| Beach/ sunbathing | 79.9% | 69.7% | 61.3% | 18.5% | 62.4% | 53.0% |
| Bodyboard/ Standup paddle board | 10.2% | 6.0% | 0.0% | 0.0% | 3.9% | 2.7% |
| Surfing | 10.0% | 4.1% | 5.9% | 0.0% | 5.1% | 3.3% |
| Canoeing/ kayak | 3.7% | 2.3% | 0.0% | 0.0% | 5.3% | 5.9% |
| Swim- ocean | 65.5% | 59.0% | 36.0% | 5.2% | 56.3% | 36.8% |
| Snorkel | 24.2% | 34.9% | 47.9% | 5.2% | 38.6% | 23.7% |
| Windsurf/ Kitesurf | 0.1% | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% |
| Jet ski/ Parasail | 1.4% | 1.5% | 0.0% | 0.0% | 1.1% | 0.0% |
| Scuba | 0.7% | 3.0% | 0.0% | 0.0% | 1.1% | 1.0% |
| Fishing | 0.9% | 1.9% | 0.0% | 0.0% | 1.1% | 1.2% |
| Golf | 2.3% | 4.8% | 11.8% | 0.0% | 5.1% | 5.2% |

STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 92.2% | 94.1% |
| Beach/ sunbathing | 78.7% | 78.4% |
| Bodyboard/ Standup paddle board | 12.1% | 9.6% |
| Surfing | 9.3% | 9.4% |
| Canoeing/ kayak | 4.2% | 4.0% |
| Swim- ocean | NA | 64.1% |
| Snorkel | NA | 27.7% |
| Windsurf/ Kitesurf | 0.3% | 0.2% |
| Jet ski/ Parasail | 1.4% | 1.4% |
| Scuba | 1.5% | 1.1% |
| Fishing | 1.1% | 1.1% |
| Golf | 3.2% | 3.1% |

ACTIVITIES – RECREATION – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.5% | 91.5% | 79.0% | 74.9% | 92.8% | 90.5% |
| Run/ Jog/ Fitness walk | 23.0% | 22.2% | 5.9% | 0.0% | 15.3% | 14.4% |
| Spa | 7.2% | 8.3% | 0.0% | 0.0% | 4.8% | 7.8% |
| Hiking/Backpack/Camp | 9.8% | 10.4% | 7.5% | 0.0% | 10.7% | 11.7% |
| Agritourism | 7.7% | 4.1% | 0.0% | 0.0% | 10.3% | 8.3% |
| Sport event/ tournament | 2.2% | 0.5% | 0.0% | 0.0% | 1.8% | 0.5% |
| Park/ botanical garden | 30.0% | 25.4% | 5.9% | 34.1% | 39.7% | 42.0% |
| Waterpark | 2.0% | 0.0% | 0.0% | 0.0% | 2.8% | 2.2% |
| Mountain tube/ waterfall rappel | 0.3% | 0.4% | 0.0% | 0.0% | 1.5% | 5.6% |
| Zip-lining | 1.3% | 2.5% | 7.5% | 5.2% | 5.8% | 6.1% |
| Skydiving | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| All terrain vehicle (ATV) | 3.0% | 1.1% | 0.0% | 6.6% | 4.2% | 3.0% |
| Horseback riding | 1.4% | 0.9% | 5.9% | 5.2% | 2.3% | 1.2% |

STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 92.2% | 94.1% |
| Run/ Jog/ Fitness walk | 28.2% | 22.8% |
| Spa | 7.4% | 7.7% |
| Hiking/Backpack/Camp | 9.1% | 10.8% |
| Agritourism | 5.1% | 8.1% |
| Sport event/ tournament | 1.9% | 2.0% |
| Park/ botanical garden | 29.7% | 32.9% |
| Waterpark | NA | 2.0% |
| Mountain tube/ waterfall rappel | NA | 0.9% |
| Zip-lining | NA | 2.4% |
| Skydiving | NA | 0.1% |
| All terrain vehicle (ATV) | NA | 3.3% |
| Horseback riding | NA | 1.6% |

ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.7% | 97.7% | 79.0% | 74.9% | 96.7% | 91.1% |
| Lunch/ sunset/ dinner/ evening cruise | 20.1% | 17.9% | 7.5% | 23.7% | 18.2% | 16.9% |
| Live music/ stage show | 24.2% | 22.8% | 25.3% | 10.4% | 17.4% | 16.1% |
| Nightclub/ dancing/ bar/ karaoke | 9.7% | 5.5% | 0.0% | 0.0% | 8.5% | 2.1% |
| Fine dining | 37.8% | 37.9% | 21.0% | 0.0% | 32.6% | 33.7% |
| Family restaurant | 70.4% | 55.7% | 25.3% | 18.5% | 61.5% | 38.0% |
| Fast food | 53.0% | 30.4% | 11.8% | 10.4% | 39.4% | 23.1% |
| Food truck | 24.4% | 17.2% | 5.9% | 0.0% | 16.7% | 16.9% |
| Café/ coffee house | 58.9% | 53.7% | 19.4% | 22.3% | 56.8% | 53.6% |
| Ethnic dining | 14.7% | 6.5% | 17.7% | 6.6% | 14.2% | 8.8% |
| Prepared own meal | 21.5% | 32.0% | 7.5% | 10.4% | 35.0% | 30.1% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 98.6% | 98.2% |
| Lunch/ sunset/ dinner/ evening cruise | 24.2% | 21.0% |
| Live music/ stage show | 23.9% | 25.3% |
| Nightclub/ dancing/ bar/ karaoke | 9.0% | 9.4% |
| Fine dining | 39.0% | 38.3% |
| Family restaurant | 75.3% | 67.7% |
| Fast food | 48.6% | 49.9% |
| Food truck | NA | 23.9% |
| Café/ coffee house | 58.0% | 58.8% |
| Ethnic dining | 16.5% | 14.5% |
| Prepared own meal | 23.5% | 25.2% |

ACTIVITIES – SHOPPING – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 97.8% | 93.0% | 86.6% | 76.3% | 93.3% | 87.0% |
| Mall/ department store | 83.3% | 41.8% | 32.8% | 18.5% | 51.2% | 33.1% |
| Designer boutique | 24.7% | 16.2% | 7.5% | 5.2% | 16.2% | 12.6% |
| Hotel/ resort store | 36.3% | 26.5% | 21.0% | 17.1% | 26.4% | 14.4% |
| Swap meet/ flea market | 9.7% | 2.3% | 0.0% | 0.0% | 8.0% | 3.3% |
| Discount/ outlet store | 52.8% | 31.6% | 7.5% | 17.1% | 31.4% | 11.1% |
| Supermarket | 51.9% | 57.6% | 19.4% | 5.2% | 56.9% | 42.5% |
| Farmer's market | 15.3% | 14.0% | 13.4% | 10.4% | 22.6% | 21.2% |
| Convenience store | 69.2% | 42.2% | 21.0% | 23.7% | 49.4% | 28.6% |
| Duty free store | 13.3% | 3.7% | 7.5% | 0.0% | 11.9% | 1.7% |
| Local shop/ artisan | 48.4% | 59.2% | 31.2% | 28.9% | 60.1% | 57.6% |

STATEWIDE - ACTIVITIES – SHOPPING – OCEANIA

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 98.0% | 96.9% |
| Mall/ department store | 81.9% | 78.0% |
| Designer boutique | 26.1% | 23.8% |
| Hotel/ resort store | 35.1% | 35.2% |
| Swap meet/ flea market | 13.7% | 9.2% |
| Discount/ outlet store | 53.3% | 49.4% |
| Supermarket | 45.0% | 54.0% |
| Farmer's market | 15.1% | 17.0% |
| Convenience store | 62.0% | 65.1% |
| Duty free store | 11.9% | 12.5% |
| Local shop/ artisan | 53.2% | 51.3% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---|-------|-------|----------|--------|------------------|--------|
| TOTAL | 74.3% | 58.9% | 82.3% | 64.5% | 66.1% | 59.1% |
| Historic military site | 50.5% | 4.6% | 15.1% | 6.6% | 31.4% | 9.0% |
| Other historical site | 18.9% | 21.3% | 25.3% | 17.1% | 29.8% | 26.6% |
| Museum/ art gallery | 12.9% | 17.1% | 28.5% | 17.1% | 19.4% | 9.9% |
| Luau/ Polynesian show/ hula show | 30.4% | 25.3% | 25.3% | 10.4% | 21.8% | 23.0% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.3% | 5.5% | 7.5% | 0.0% | 7.2% | 4.4% |
| Play/ concert/ theatre | 4.2% | 3.8% | 0.0% | 0.0% | 4.1% | 3.5% |
| Art/ craft fair | 4.6% | 8.5% | 7.5% | 17.1% | 6.8% | 4.6% |
| Festival event | 4.2% | 3.0% | 0.0% | 13.3% | 1.0% | 3.1% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 74.0% | 74.6% |
| Historic military site | 52.8% | 45.5% |
| Other historical site | 23.7% | 21.7% |
| Museum/ art gallery | 14.3% | 14.5% |
| Luau/ Polynesian show/ hula show | 34.3% | 31.5% |
| Lesson- ex. ukulele, hula, canoe, lei making | 4.0% | 6.6% |
| Play/ concert/ theatre | 3.2% | 4.4% |
| Art/ craft fair | 5.4% | 5.6% |
| Festival event | 6.8% | 4.1% |

ACTIVITIES – TRANSPORTATION – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 97.6% | 93.7% | 94.1% | 76.3% | 93.8% | 95.5% |
| Airport shuttle | 56.9% | 34.0% | 13.4% | 18.5% | 35.8% | 19.2% |
| Trolley | 24.7% | 5.1% | 0.0% | 0.0% | 16.3% | 4.5% |
| Public bus | 33.0% | 11.1% | 21.0% | 6.6% | 14.4% | 5.0% |
| Tour bus/ tour van | 36.7% | 21.4% | 32.8% | 40.8% | 34.1% | 39.1% |
| Taxi/ limo | 41.5% | 20.1% | 19.4% | 17.1% | 22.0% | 13.7% |
| Rental car | 24.1% | 50.7% | 19.4% | 11.8% | 53.4% | 48.7% |
| Ride share | 22.0% | 11.6% | 0.0% | 0.0% | 12.6% | 7.2% |
| Bicycle rental | 1.5% | 1.4% | 0.0% | 0.0% | 2.1% | 1.6% |

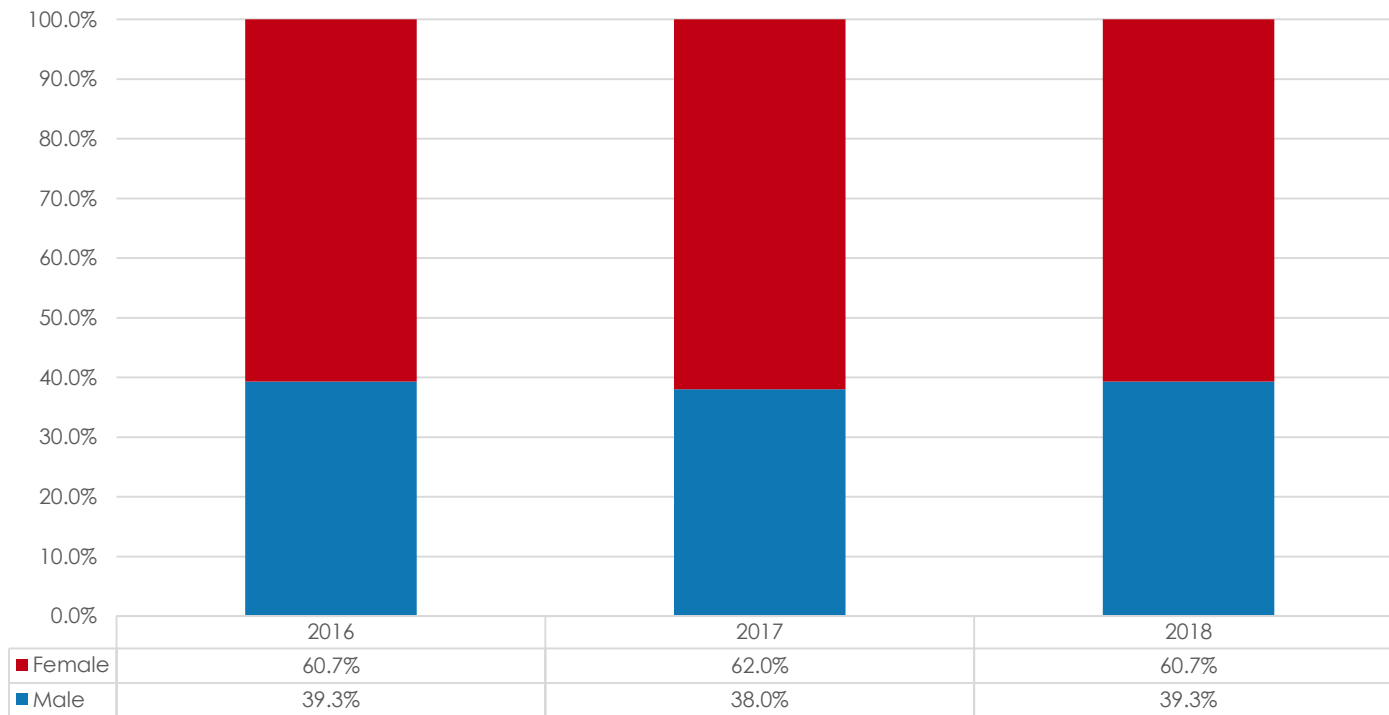
STATEWIDE - ACTIVITIES – TRANSPORTATION – OCEANIA

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 98.7% | 96.9% |
| Airport shuttle | 60.8% | 53.1% |
| Trolley | 23.7% | 22.6% |
| Public bus | 27.7% | 30.1% |
| Tour bus/ tour van | 35.8% | 37.0% |
| Taxi/ limo | 43.2% | 39.0% |
| Rental car | 31.8% | 31.0% |
| Ride share | NA | 20.6% |
| Bicycle rental | NA | 1.7% |

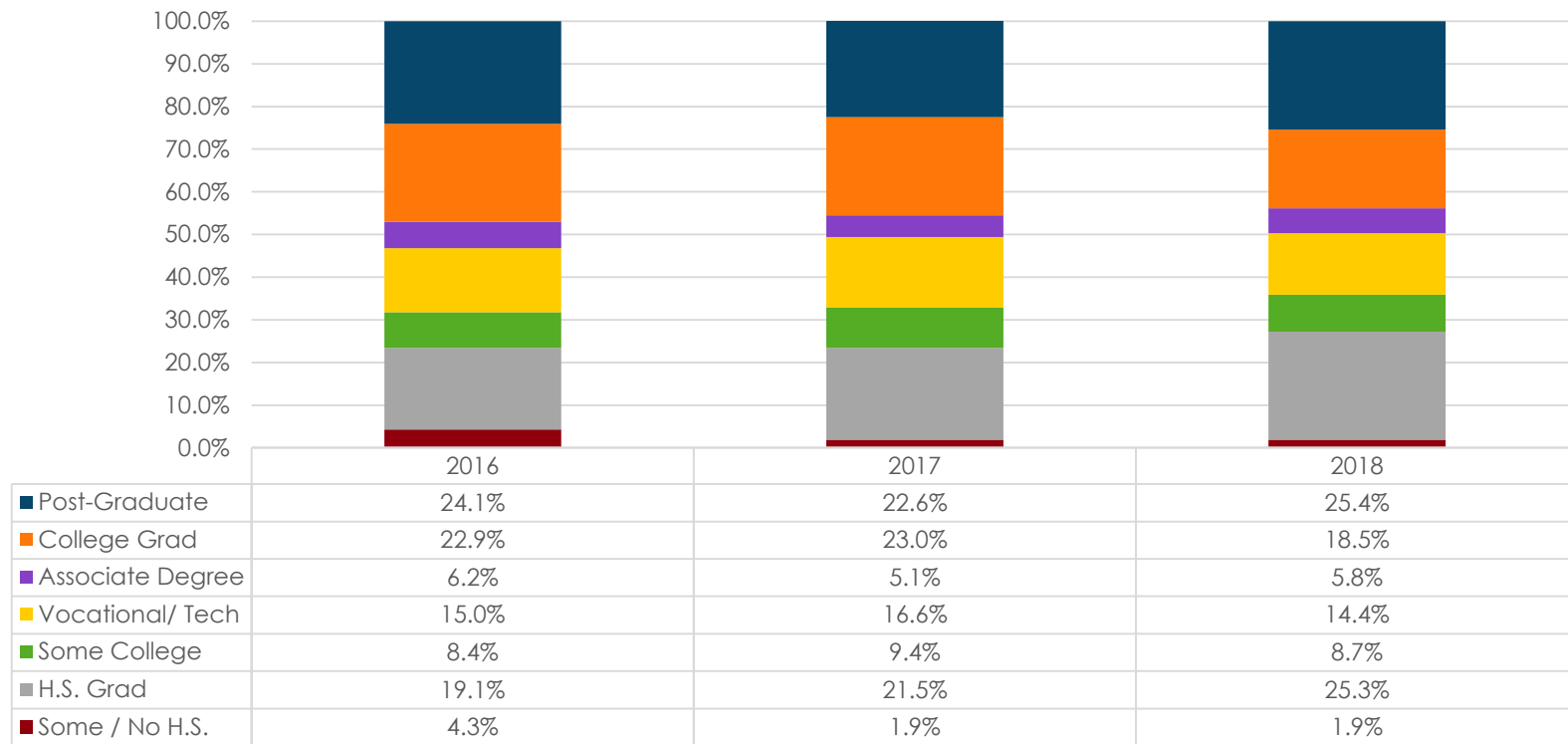
ACTIVITIES – OTHER – OCEANIA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|------------------------------|-------|------|----------|--------|------------------|--------|
| TOTAL | 8.1% | 9.9% | 21.0% | 5.2% | 6.6% | 10.7% |
| Visit friends/ family | 7.5% | 8.9% | 5.9% | 5.2% | 6.6% | 10.7% |
| Volunteer- non-profit | 0.7% | 0.9% | 15.1% | 0.0% | 0.5% | 0.0% |

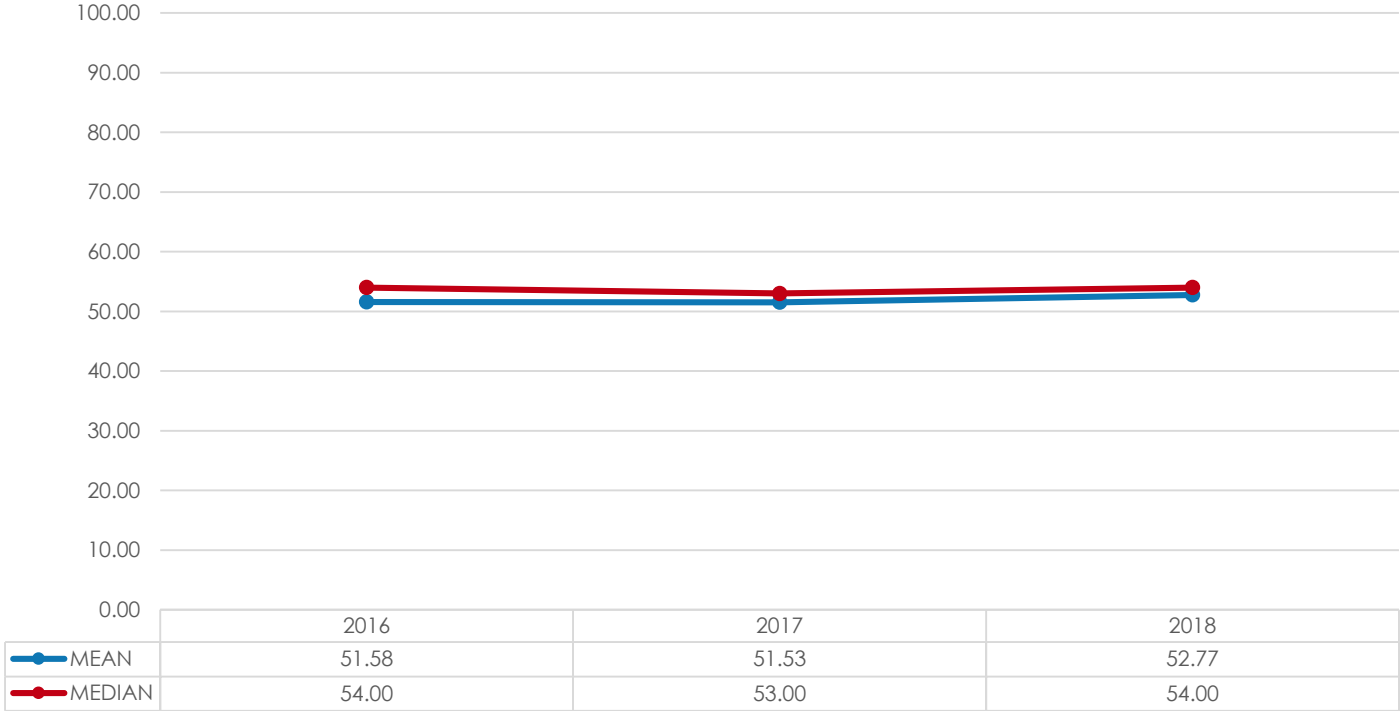
VISITOR PROFILE – GENDER – OCEANIA



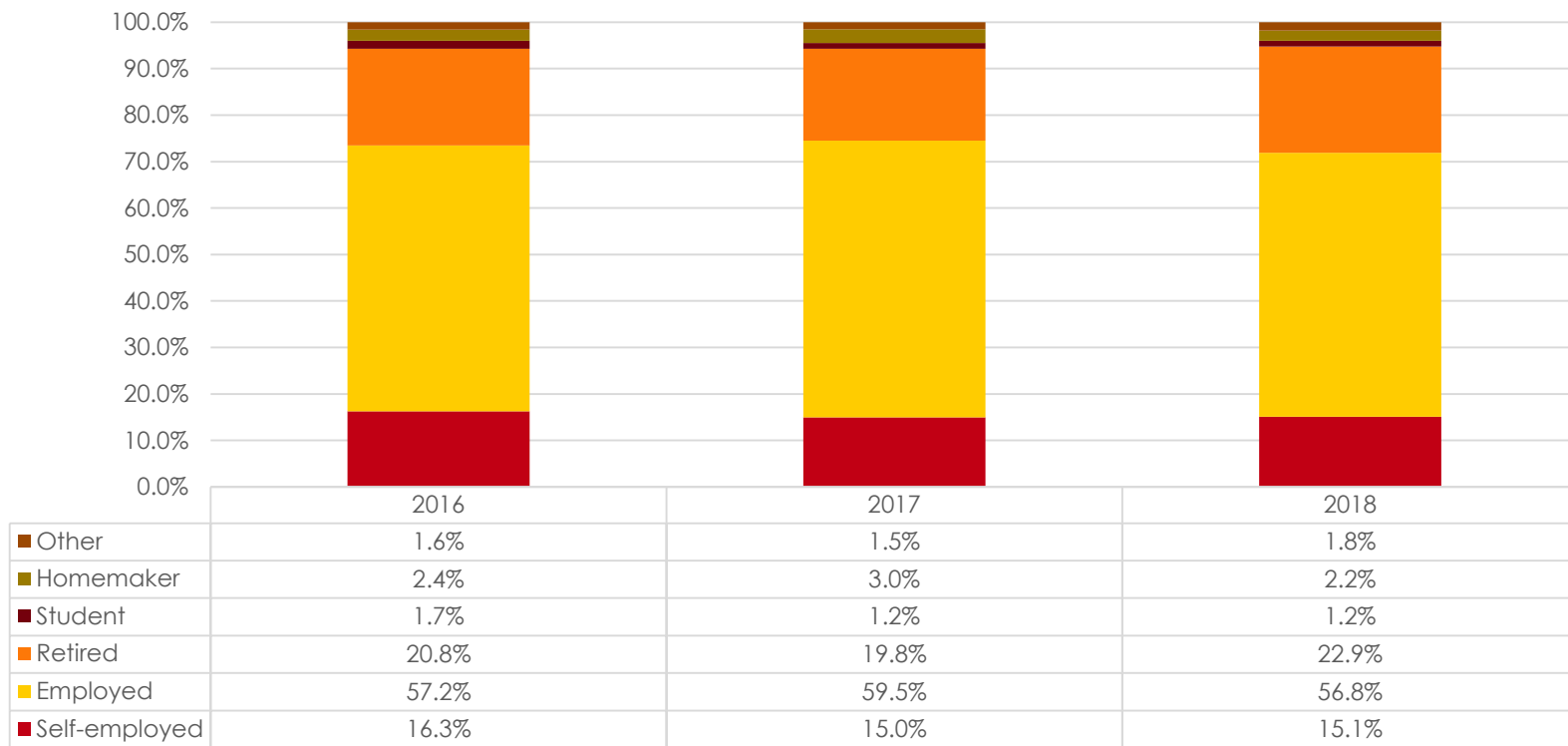
VISITOR PROFILE – EDUCATION – OCEANIA



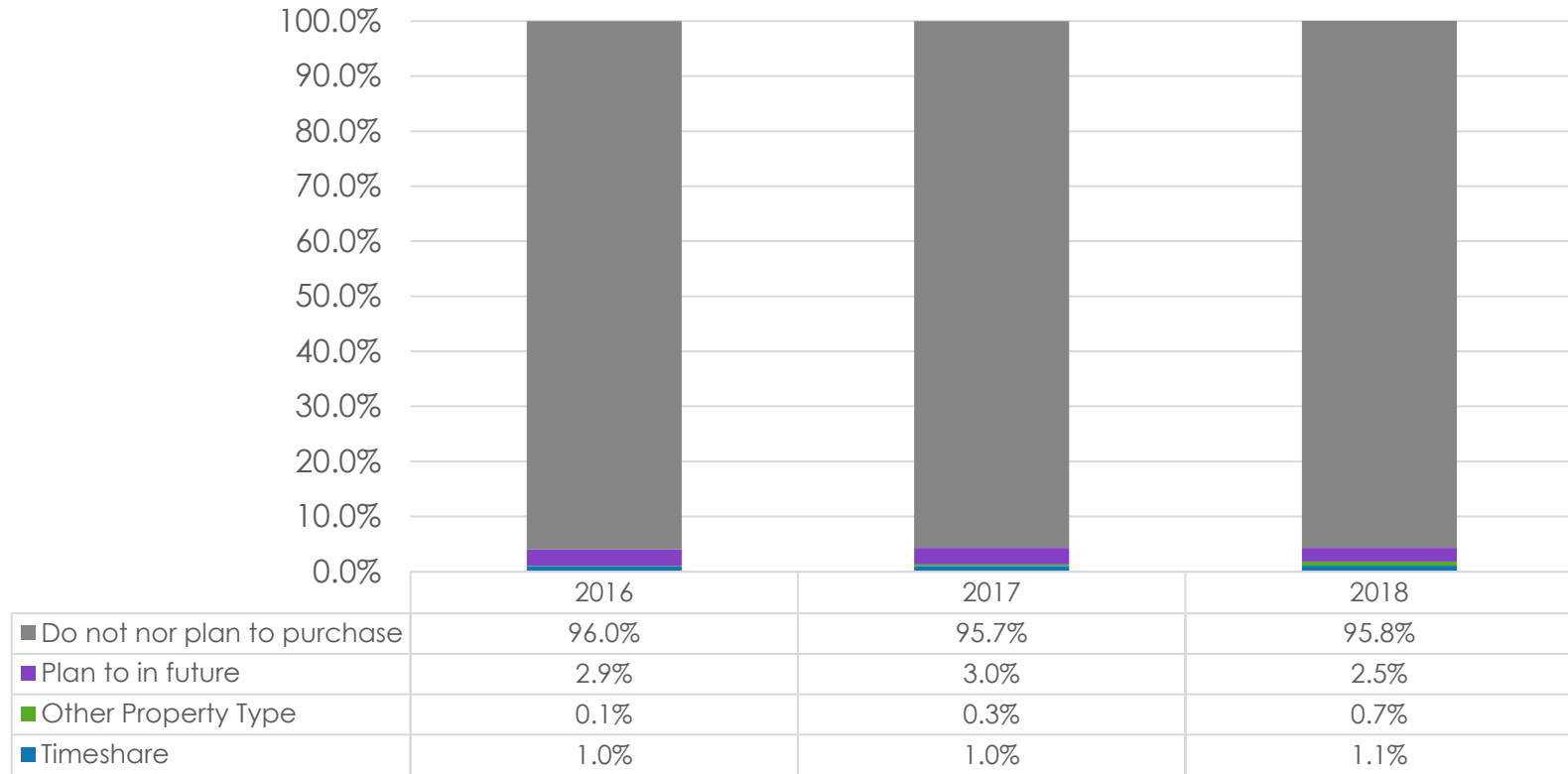
VISITOR PROFILE – AGE – OCEANIA



VISITOR PROFILE – EMPLOYMENT STATUS – OCEANIA



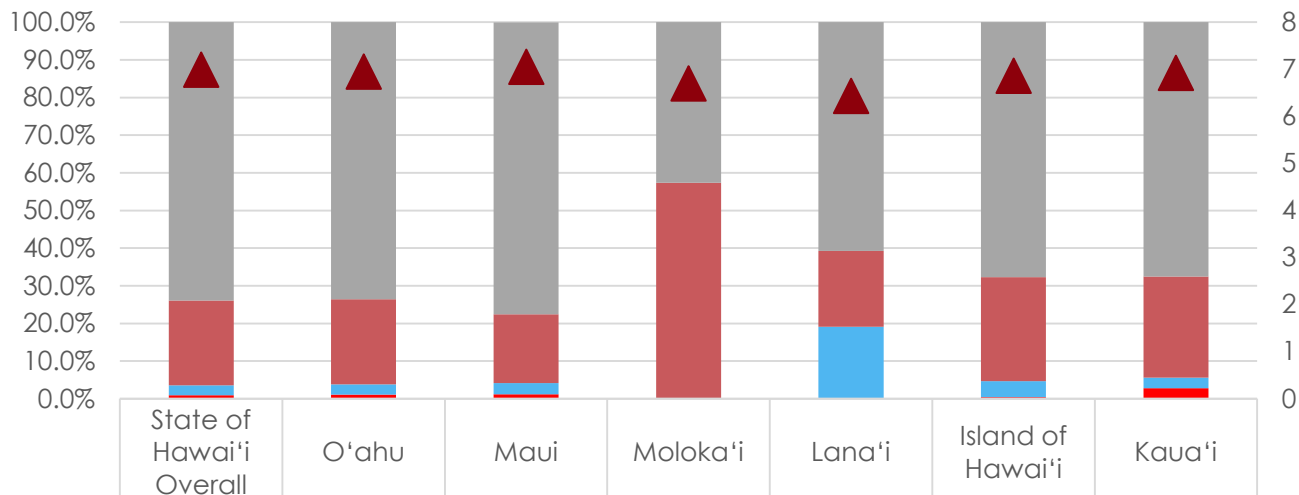
VISITOR PROFILE – HAWAII PROPERTY OWNER – OCEANIA



SECTION – CHINA

OVERALL SATISFACTION – MOST RECENT VISIT – CHINA

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



| | State of Hawai'i Overall | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------------|--------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Extremely satisfied (7-8) | 73.9% | 73.6% | 77.5% | 42.6% | 60.7% | 67.7% | 67.6% |
| ■ Somewhat satisfied (5-6) | 22.5% | 22.6% | 18.2% | 57.4% | 20.2% | 27.6% | 26.9% |
| ■ Somewhat dissatisfied (3-4) | 2.7% | 2.7% | 3.0% | 0.0% | 19.1% | 4.3% | 2.8% |
| ■ Not at all satisfied (1-2) | 0.9% | 1.1% | 1.2% | 0.0% | 0.0% | 0.4% | 2.8% |
| BASE | 806 | 729 | 165 | 7 | 5 | 257 | 37 |
| ▲ MEAN | 6.99 | 6.95 | 7.05 | 6.70 | 6.43 | 6.86 | 6.92 |

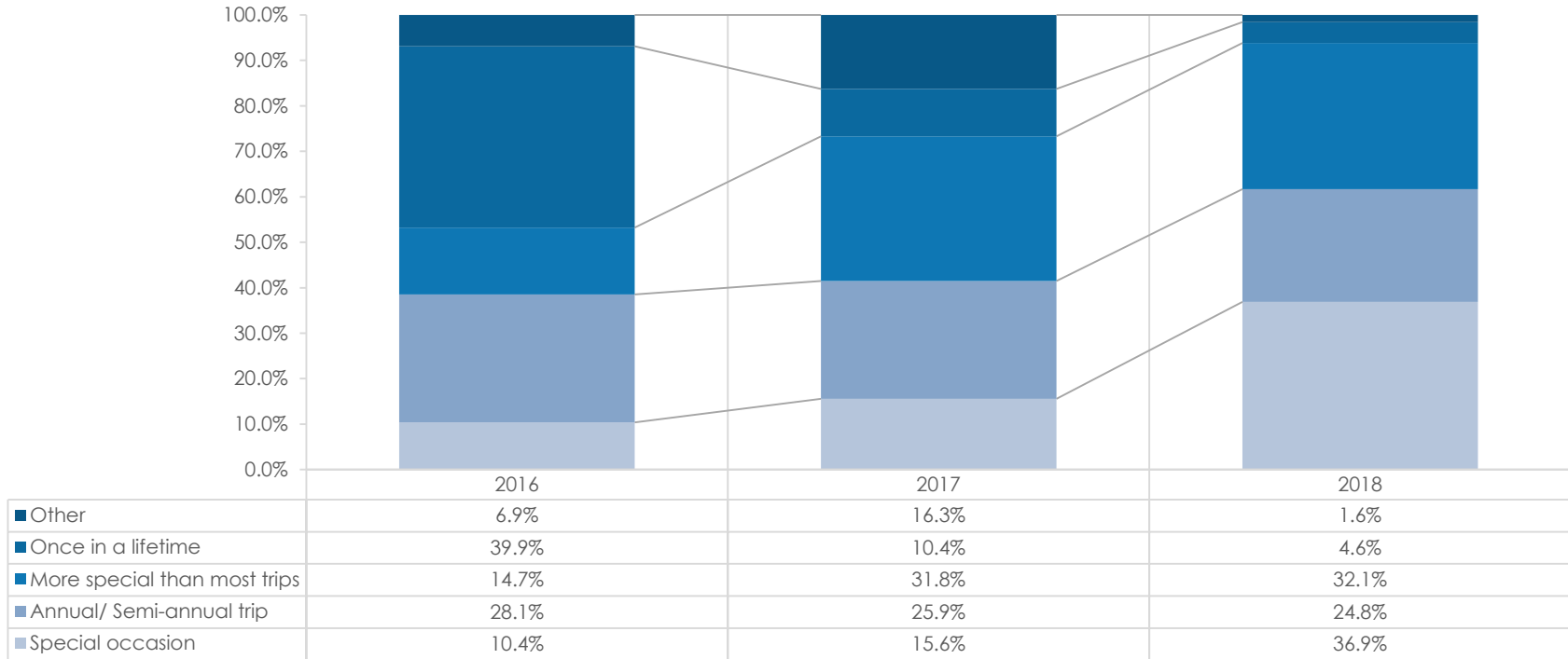
PRIMARY TRIP PURPOSE CHINA

| | 2017 | 2018 |
|-----------------------------------|-------|-------|
| Vacation | 73.0% | 71.2% |
| Business trip | 1.9% | 3.8% |
| Honeymoon | 5.2% | 3.7% |
| Visit friends/ relatives | 2.6% | 3.2% |
| Convention, conference, seminar | 3.2% | 2.9% |
| Incentive/ reward | 2.3% | 2.3% |
| Education related/ visit campuses | 1.9% | 2.1% |
| Anniversary/ birthday | 0.9% | 2.0% |

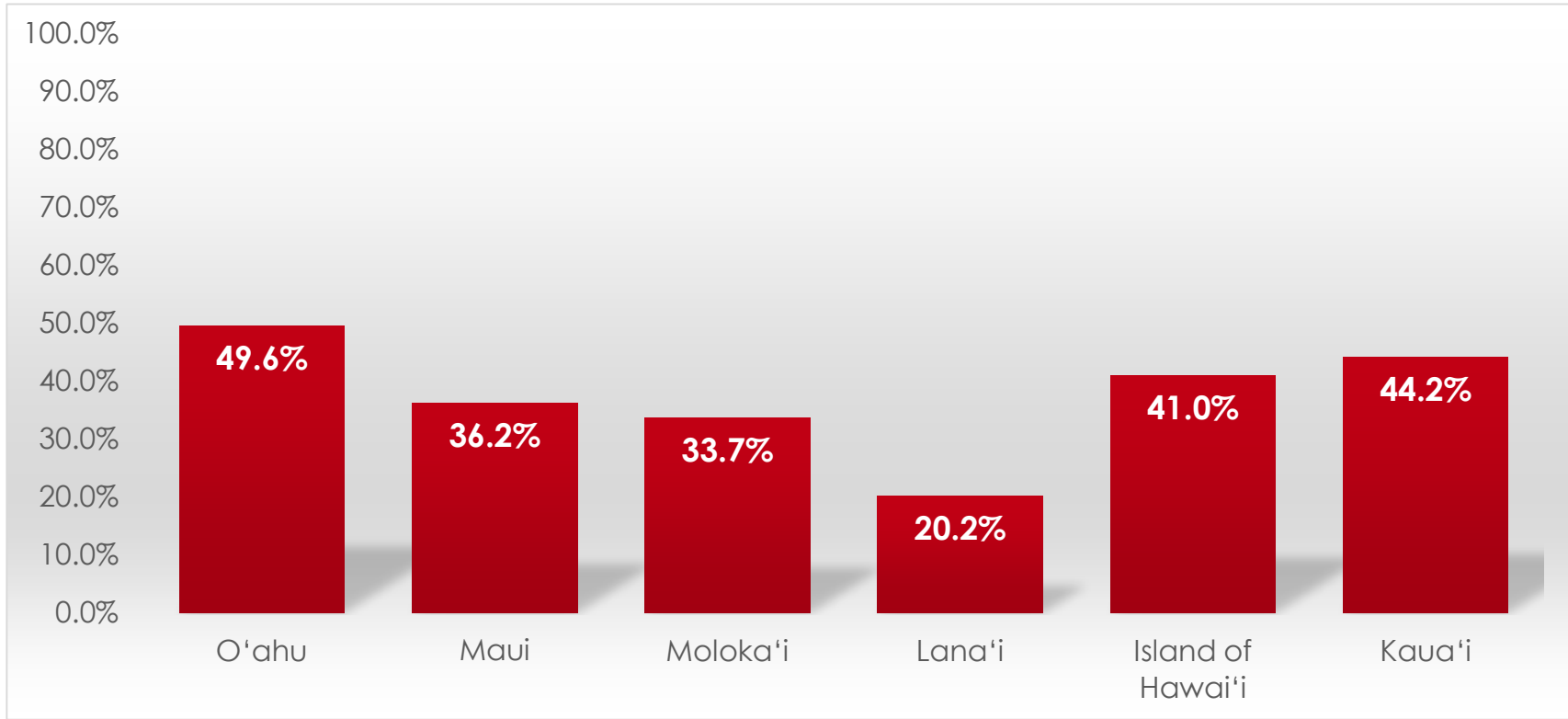
SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE CHINA

| | 2017 | 2018 |
|---------------------------------|-------|-------|
| Vacation | 91.9% | 89.0% |
| Shopping/ fashion | 35.3% | 16.8% |
| Visit friends/ relatives | 7.9% | 6.4% |
| Family gathering/ reunion | 8.5% | 5.1% |
| Honeymoon | 10.1% | 5.1% |
| Business trip | 5.4% | 5.1% |
| Convention, conference, seminar | 5.5% | 4.0% |
| Anniversary/ birthday | 7.7% | 3.7% |
| Incentive/ reward | 7.6% | 3.5% |

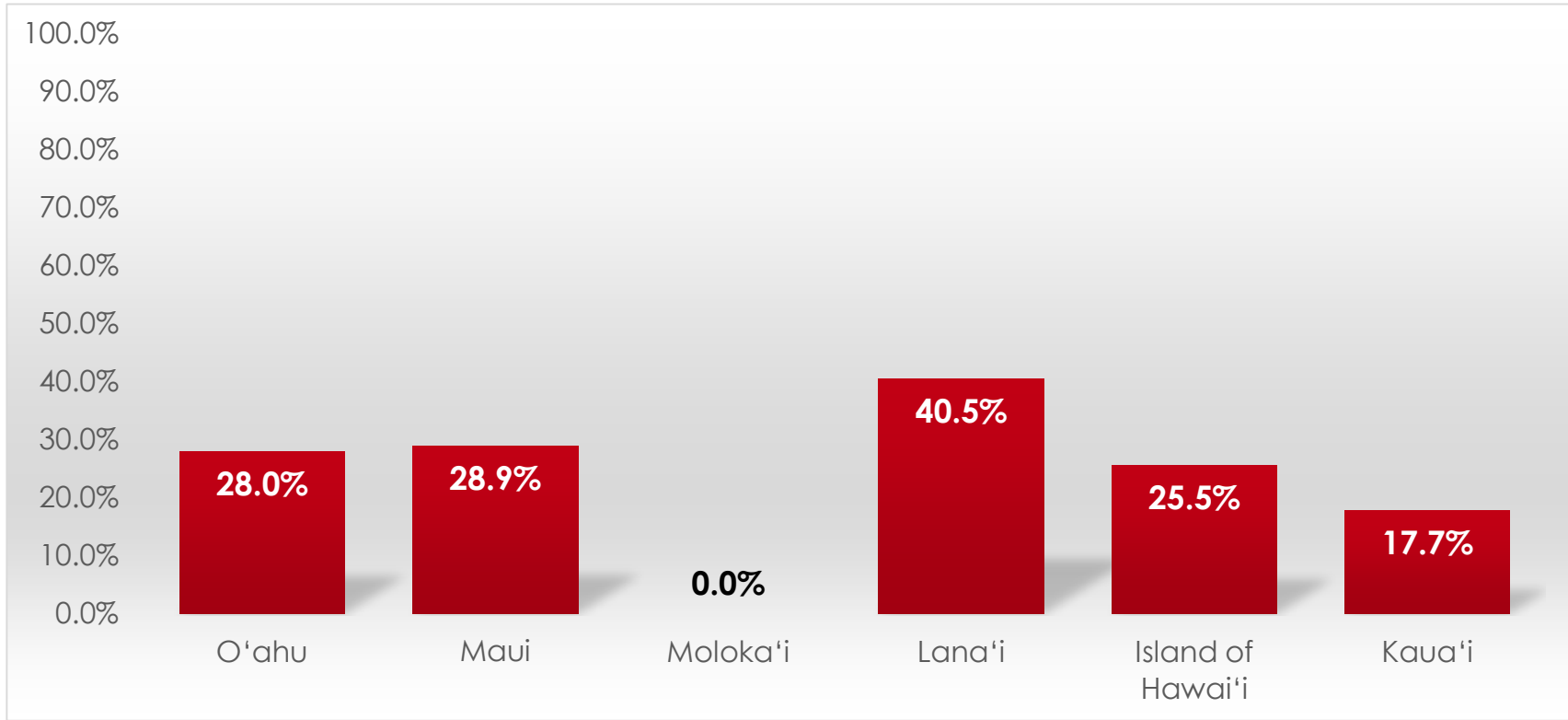
VACATION TRIP DESCRIPTION – CHINA



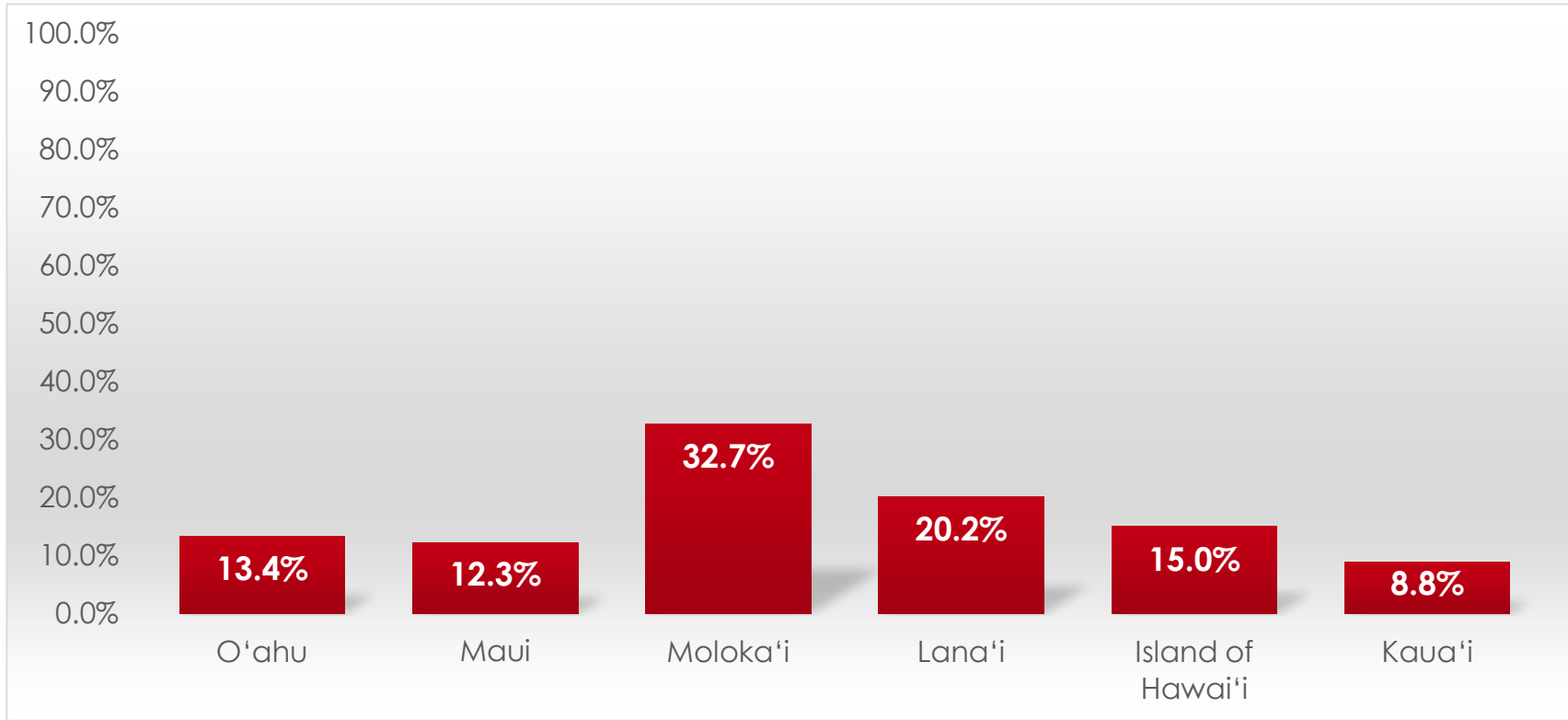
ADVERTISING AWARENESS – CHINA



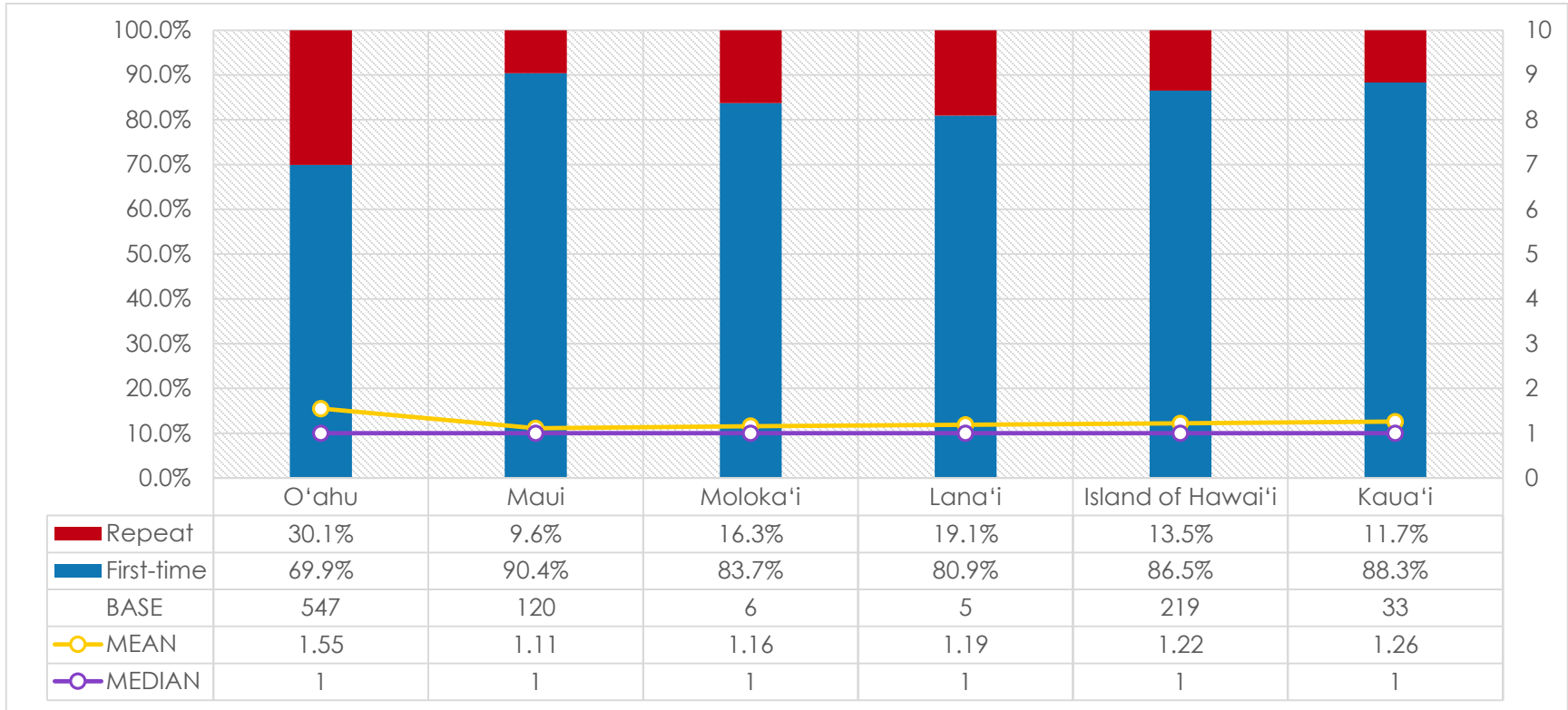
IMPACT OF LOCATION FILMING – CHINA



IMPACT OF HAWAIIAN MUSIC – CHINA



1ST TIME VS REPEAT VISITOR – CHINA

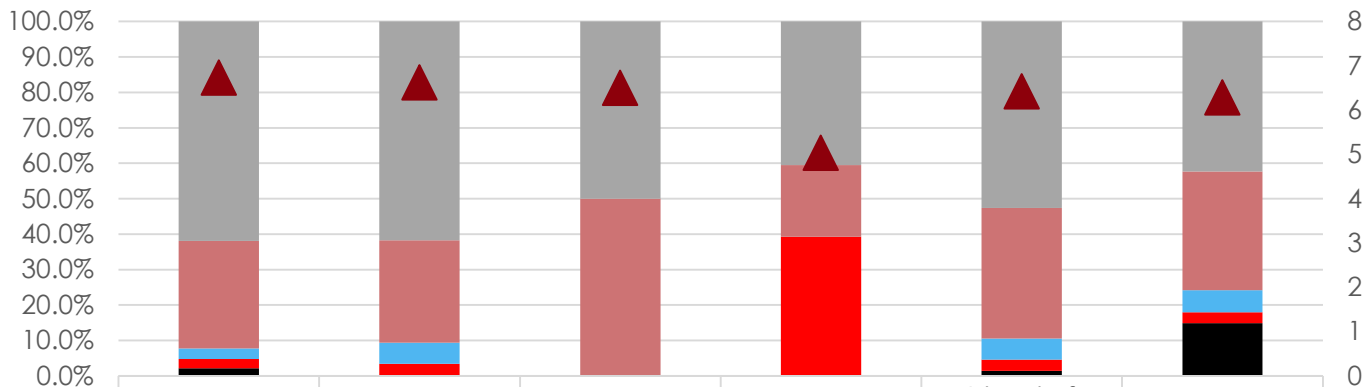


TRAVEL PARTY MEMBERS – CHINA

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 47.6% | 50.4% | 45.3% |
| Other adult family | 21.0% | 21.0% | 25.0% |
| Child under 18 | 15.0% | 14.2% | 22.4% |
| Friends/ associates | 21.5% | 25.2% | 24.3% |
| Alone | 13.9% | 10.7% | 8.5% |
| Girlfriend/ boyfriend | 4.1% | 3.1% | 9.7% |
| Same-sex partner | 1.8% | 1.8% | 2.2% |

LIKELIHOOD OF RETURN VISIT – CHINA

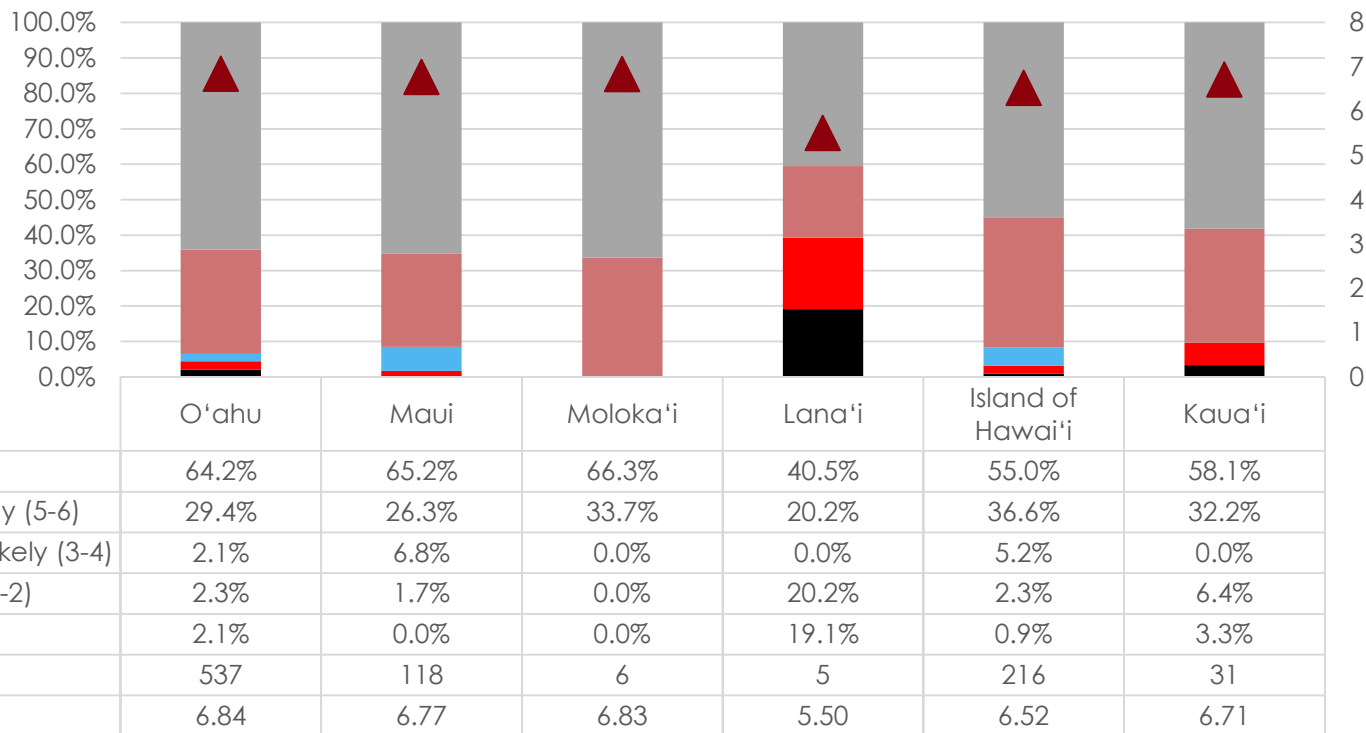
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 61.9% | 61.8% | 50.0% | 40.5% | 52.6% | 42.3% |
| ■ Somewhat likely (5-6) | 30.3% | 28.9% | 50.0% | 20.2% | 36.8% | 33.5% |
| ■ Somewhat unlikely (3-4) | 3.0% | 6.0% | 0.0% | 0.0% | 6.0% | 6.2% |
| ■ Very unlikely (1-2) | 2.6% | 3.4% | 0.0% | 39.3% | 3.2% | 3.1% |
| ■ Not sure | 2.2% | 0.0% | 0.0% | 0.0% | 1.4% | 14.9% |
| BASE | 542 | 118 | 6 | 5 | 218 | 33 |
| ▲ MEAN | 6.73 | 6.62 | 6.50 | 5.03 | 6.42 | 6.28 |

BRAND/DESTINATION ADVOCACY – CHINA

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



ACTIVITIES – SIGHTSEEING – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.3% | 94.0% | 100.0% | 100.0% | 98.1% | 80.8% |
| On own (self-guided) | 56.3% | 65.0% | 50.0% | 80.9% | 53.2% | 61.4% |
| Helicopter/ airplane | 8.0% | 5.1% | 0.0% | 20.2% | 57.4% | 19.4% |
| Boat/ submarine/ whale | 25.6% | 36.9% | 0.0% | 40.5% | 16.4% | 26.0% |
| Visit towns | 27.2% | 30.6% | 0.0% | 40.5% | 29.9% | 32.2% |
| Limo/ van/ bus tour | 17.9% | 8.6% | 16.3% | 0.0% | 21.0% | 15.7% |
| Scenic views/ natural landmark | 64.4% | 64.1% | 50.0% | 79.8% | 15.9% | 61.6% |
| Movie/ TV/ film location | 13.7% | 6.1% | 17.3% | 20.2% | 75.6% | 16.3% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - CHINA

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 97.2% | 95.7% |
| On own (self-guided) | 63.5% | 59.6% |
| Helicopter/ airplane | 14.3% | 22.8% |
| Boat/ submarine/ whale | 30.4% | 27.6% |
| Visit towns | 20.7% | 31.3% |
| Limo/ van/ bus tour | 22.0% | 18.4% |
| Scenic views/ natural landmark | 65.5% | 56.3% |
| Movie/ TV/ film location | 21.3% | 29.6% |

ACTIVITIES – RECREATION – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|--|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 92.5% | 94.9% | 82.7% | 100.0% | 95.8% | 83.9% |
| Beach/ sunbathing | 74.7% | 75.4% | 32.7% | 80.9% | 65.2% | 68.0% |
| Bodyboard/ Standup paddle board | 3.2% | 6.0% | 0.0% | 20.2% | 3.7% | 6.4% |
| Surfing | 7.7% | 5.2% | 17.3% | 0.0% | 5.6% | 16.1% |
| Canoeing/ kayak | 3.5% | 4.3% | 0.0% | 0.0% | 2.3% | 6.4% |
| Swim- ocean | 38.1% | 38.7% | 16.3% | 20.2% | 35.9% | 28.9% |
| Snorkel | 17.1% | 29.1% | 0.0% | 0.0% | 22.5% | 22.3% |
| Windsurf/ Kitesurf | 1.5% | 1.7% | 0.0% | 19.1% | 1.8% | 3.1% |
| Jet ski/ Parasail | 0.9% | 0.0% | 0.0% | 19.1% | 1.4% | 3.1% |
| Scuba | 3.2% | 2.6% | 16.3% | 19.1% | 1.9% | 6.4% |
| Fishing | 3.9% | 2.6% | 16.3% | 0.0% | 5.0% | 9.5% |
| Golf | 4.8% | 5.1% | 0.0% | 19.1% | 4.1% | 9.5% |

STATEWIDE - ACTIVITIES – RECREATION – CHINA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 94.7% | 94.1% |
| Beach/ sunbathing | 81.9% | 75.1% |
| Bodyboard/ Standup paddle board | 6.2% | 4.0% |
| Surfing | 7.6% | 7.9% |
| Canoeing/ kayak | 3.9% | 3.8% |
| Swim- ocean | NA | 39.2% |
| Snorkel | NA | 21.0% |
| Windsurf/ Kitesurf | 1.3% | 1.9% |
| Jet ski/ Parasail | 2.3% | 1.1% |
| Scuba | 4.5% | 3.6% |
| Fishing | 4.1% | 4.9% |
| Golf | 2.8% | 5.7% |

ACTIVITIES – RECREATION – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 92.5% | 94.9% | 82.7% | 100.0% | 95.8% | 83.9% |
| Run/ Jog/ Fitness walk | 21.8% | 17.9% | 0.0% | 20.2% | 15.8% | 16.1% |
| Spa | 4.9% | 2.6% | 16.3% | 39.3% | 3.2% | 19.2% |
| Hiking/Backpack/Camp | 11.3% | 13.6% | 0.0% | 60.7% | 15.9% | 16.3% |
| Agritourism | 16.0% | 15.4% | 16.3% | 20.2% | 15.9% | 19.4% |
| Sport event/ tournament | 1.7% | 0.9% | 16.3% | 0.0% | 0.4% | 3.1% |
| Park/ botanical garden | 35.3% | 34.1% | 0.0% | 39.3% | 46.2% | 48.3% |
| Waterpark | 13.7% | 8.6% | 0.0% | 19.1% | 6.4% | 19.0% |
| Mountain tube/ waterfall rappel | 0.9% | 2.6% | 0.0% | 19.1% | 1.8% | 3.1% |
| Zip-lining | 1.3% | 1.7% | 0.0% | 19.1% | 1.8% | 6.4% |
| Skydiving | 10.7% | 5.2% | 16.3% | 19.1% | 8.4% | 15.7% |
| All terrain vehicle (ATV) | 6.2% | 8.6% | 0.0% | 20.2% | 6.6% | 6.2% |
| Horseback riding | 12.1% | 4.3% | 0.0% | 0.0% | 6.5% | 12.6% |

STATEWIDE - ACTIVITIES – RECREATION – CHINA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 94.7% | 94.1% |
| Run/ Jog/ Fitness walk | 22.4% | 20.6% |
| Spa | 2.6% | 5.5% |
| Hiking/Backpack/Camp | 20.4% | 13.7% |
| Agritourism | 24.5% | 17.3% |
| Sport event/ tournament | 2.2% | 1.7% |
| Park/ botanical garden | 50.2% | 41.1% |
| Waterpark | NA | 13.1% |
| Mountain tube/ waterfall rappel | NA | 1.5% |
| Zip-lining | NA | 1.9% |
| Skydiving | NA | 10.9% |
| All terrain vehicle (ATV) | NA | 7.3% |
| Horseback riding | NA | 11.1% |

ACTIVITIES – ENTERTAINMENT & DINING – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 96.2% | 96.6% | 82.7% | 79.8% | 97.2% | 90.3% |
| Lunch/ sunset/ dinner/ evening cruise | 57.7% | 66.7% | 33.7% | 79.8% | 51.2% | 51.6% |
| Live music/ stage show | 14.9% | 23.1% | 49.0% | 0.0% | 9.8% | 9.5% |
| Nightclub/ dancing/ bar/ karaoke | 10.5% | 8.5% | 0.0% | 0.0% | 3.3% | 9.5% |
| Fine dining | 51.4% | 48.5% | 0.0% | 20.2% | 28.9% | 38.6% |
| Family restaurant | 17.7% | 12.6% | 0.0% | 20.2% | 21.4% | 12.6% |
| Fast food | 42.4% | 35.2% | 33.7% | 40.5% | 48.5% | 38.9% |
| Food truck | 17.8% | 11.9% | 17.3% | 39.3% | 15.0% | 19.2% |
| Café/ coffee house | 37.8% | 33.3% | 0.0% | 19.1% | 29.4% | 28.9% |
| Ethnic dining | 17.7% | 15.4% | 0.0% | 40.5% | 18.5% | 9.5% |
| Prepared own meal | 15.2% | 20.4% | 0.0% | 20.2% | 19.6% | 16.5% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – CHINA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 95.5% | 96.1% |
| Lunch/ sunset/ dinner/ evening cruise | 56.3% | 60.7% |
| Live music/ stage show | 24.3% | 16.2% |
| Nightclub/ dancing/ bar/ karaoke | 6.7% | 9.7% |
| Fine dining | 52.3% | 47.6% |
| Family restaurant | 21.6% | 19.1% |
| Fast food | 48.9% | 43.5% |
| Food truck | NA | 18.4% |
| Café/ coffee house | 28.6% | 37.3% |
| Ethnic dining | 20.4% | 18.5% |
| Prepared own meal | 21.3% | 18.0% |

ACTIVITIES – SHOPPING – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 95.1% | 93.2% | 66.3% | 59.5% | 95.4% | 87.0% |
| Mall/ department store | 73.9% | 40.1% | 33.7% | 0.0% | 51.8% | 45.3% |
| Designer boutique | 9.6% | 4.3% | 32.7% | 0.0% | 7.0% | 9.5% |
| Hotel/ resort store | 24.0% | 25.7% | 16.3% | 39.3% | 18.3% | 15.9% |
| Swap meet/ flea market | 4.8% | 1.7% | 0.0% | 19.1% | 2.4% | 3.1% |
| Discount/ outlet store | 42.3% | 38.6% | 0.0% | 0.0% | 26.1% | 25.8% |
| Supermarket | 60.3% | 56.5% | 17.3% | 39.3% | 69.5% | 44.8% |
| Farmer's market | 9.0% | 15.3% | 17.3% | 20.2% | 18.5% | 19.4% |
| Convenience store | 44.2% | 38.5% | 0.0% | 19.1% | 39.2% | 26.0% |
| Duty free store | 56.9% | 30.9% | 16.3% | 0.0% | 31.3% | 28.9% |
| Local shop/ artisan | 24.6% | 25.6% | 0.0% | 0.0% | 21.9% | 32.5% |

STATEWIDE - ACTIVITIES – SHOPPING – CHINA

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 97.2% | 93.9% |
| Mall/ department store | 78.7% | 66.5% |
| Designer boutique | 13.7% | 9.0% |
| Hotel/ resort store | 18.6% | 24.7% |
| Swap meet/ flea market | 6.6% | 4.4% |
| Discount/ outlet store | 34.0% | 40.7% |
| Supermarket | 40.6% | 62.2% |
| Farmer's market | 13.3% | 13.1% |
| Convenience store | 44.3% | 42.2% |
| Duty free store | 61.4% | 50.7% |
| Local shop/ artisan | 29.7% | 24.8% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 81.2% | 76.1% | 82.7% | 79.8% | 77.9% | 70.9% |
| Historic military site | 59.1% | 24.8% | 33.7% | 79.8% | 37.0% | 28.7% |
| Other historical site | 24.2% | 25.5% | 32.7% | 40.5% | 34.8% | 22.5% |
| Museum/ art gallery | 15.2% | 8.5% | 16.3% | 20.2% | 14.0% | 22.3% |
| Luau/ Polynesian show/ hula show | 12.5% | 18.0% | 0.0% | 20.2% | 9.9% | 6.4% |
| Lesson- ex. ukulele, hula, canoe, lei making | 10.0% | 7.8% | 33.7% | 40.5% | 8.0% | 16.1% |
| Play/ concert/ theatre | 4.1% | 0.9% | 0.0% | 0.0% | 3.7% | 3.1% |
| Art/ craft fair | 8.4% | 13.5% | 17.3% | 20.2% | 12.6% | 13.2% |
| Festival event | 1.3% | 3.4% | 0.0% | 0.0% | 1.4% | 0.0% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 84.6% | 80.9% |
| Historic military site | 67.6% | 51.9% |
| Other historical site | 23.1% | 28.6% |
| Museum/ art gallery | 23.9% | 15.9% |
| Luau/ Polynesian show/ hula show | 17.9% | 13.2% |
| Lesson- ex. ukulele, hula, canoe, lei making | 3.5% | 10.7% |
| Play/ concert/ theatre | 5.2% | 3.8% |
| Art/ craft fair | 7.0% | 11.7% |
| Festival event | 3.6% | 1.8% |

ACTIVITIES – TRANSPORTATION – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 93.1% | 92.4% | 49.0% | 79.8% | 93.5% | 93.8% |
| Airport shuttle | 17.1% | 19.8% | 0.0% | 40.5% | 20.9% | 9.7% |
| Trolley | 9.4% | 5.2% | 16.3% | 0.0% | 3.7% | 0.0% |
| Public bus | 23.3% | 3.5% | 16.3% | 19.1% | 10.2% | 3.1% |
| Tour bus/ tour van | 26.4% | 18.0% | 32.7% | 0.0% | 15.7% | 32.0% |
| Taxi/ limo | 25.5% | 13.6% | 0.0% | 39.3% | 23.2% | 16.1% |
| Rental car | 45.6% | 65.0% | 0.0% | 59.5% | 57.8% | 58.3% |
| Ride share | 16.0% | 6.0% | 0.0% | 0.0% | 11.7% | 9.5% |
| Bicycle rental | 3.4% | 0.0% | 0.0% | 0.0% | 3.2% | 3.3% |

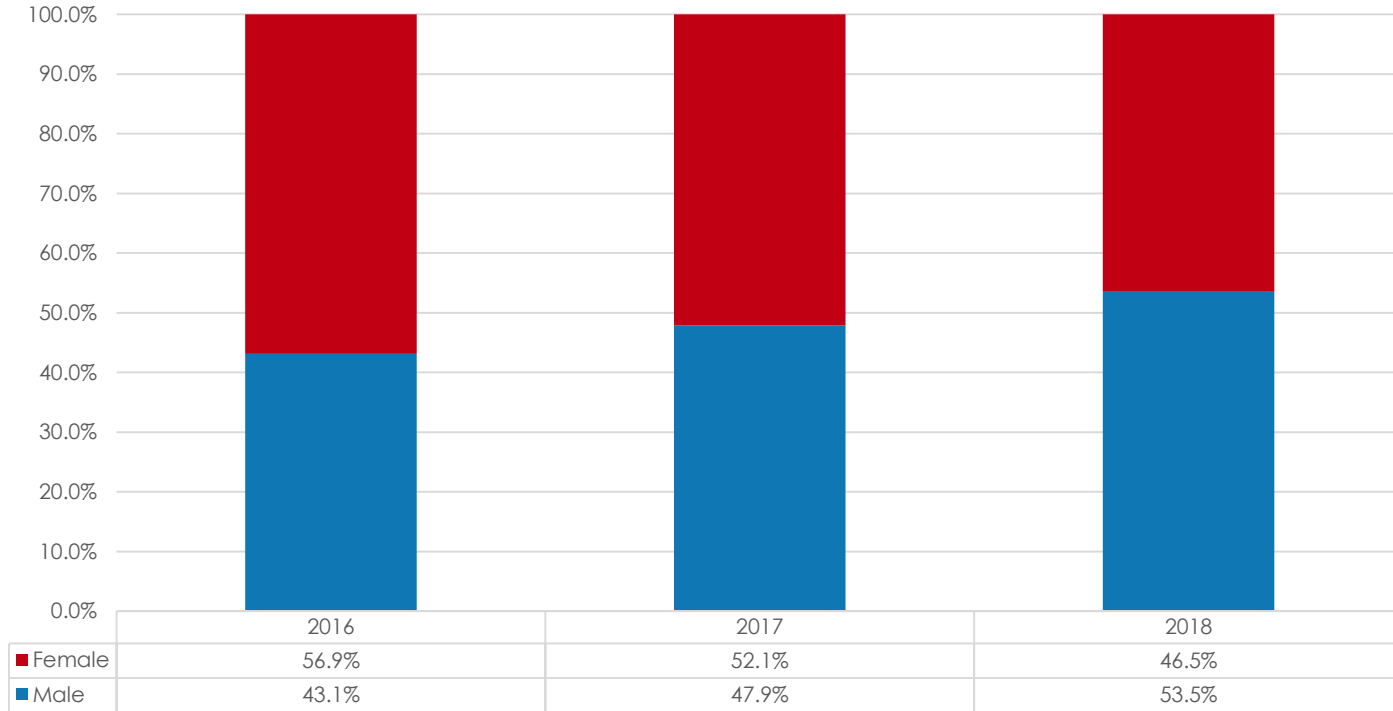
STATEWIDE - ACTIVITIES – TRANSPORTATION – CHINA

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 98.1% | 92.7% |
| Airport shuttle | 31.9% | 19.5% |
| Trolley | 3.4% | 8.0% |
| Public bus | 18.6% | 18.8% |
| Tour bus/ tour van | 35.6% | 24.6% |
| Taxi/ limo | 23.2% | 24.6% |
| Rental car | 44.8% | 51.9% |
| Ride share | NA | 14.7% |
| Bicycle rental | NA | 3.2% |

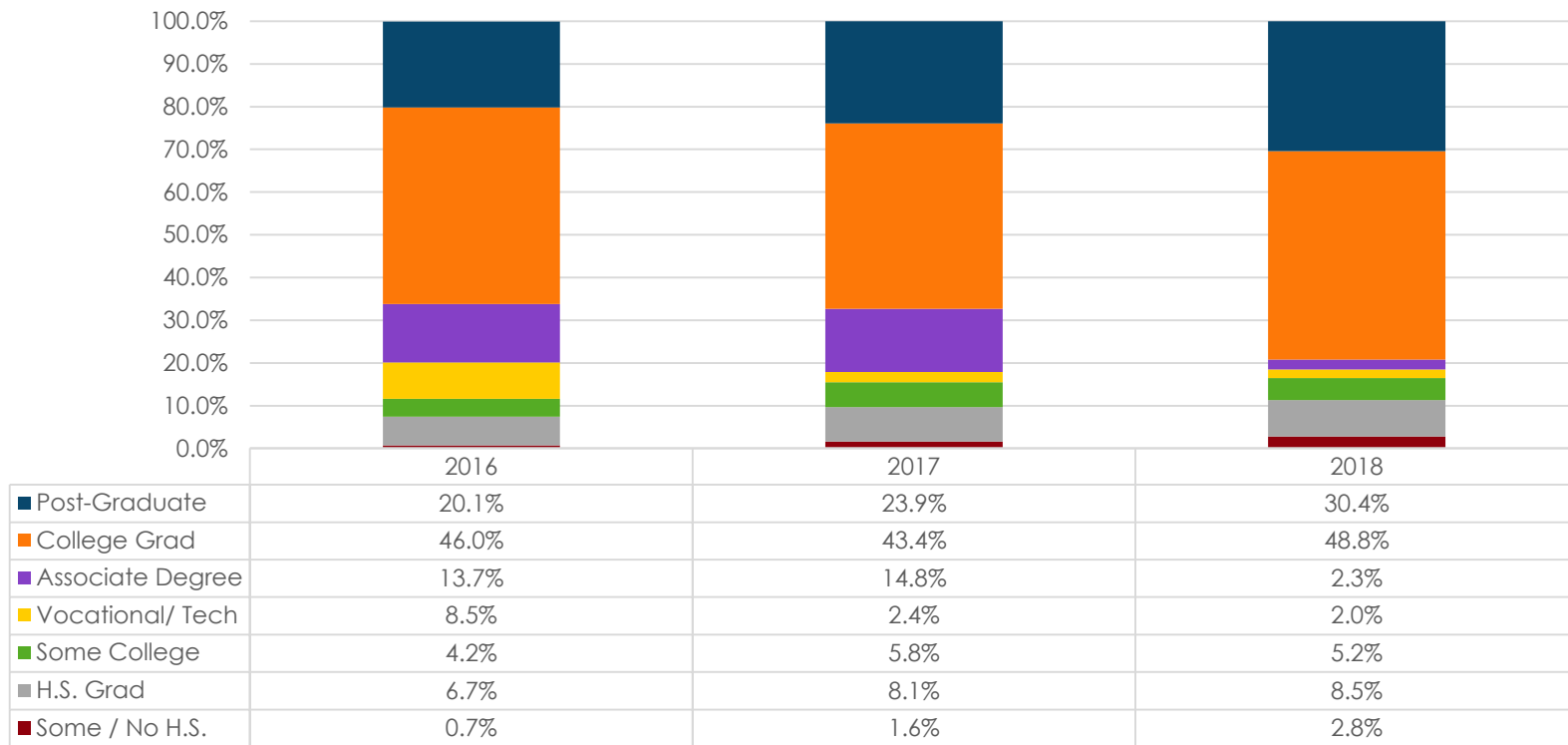
ACTIVITIES – OTHER – CHINA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 19.9% | 10.2% | 32.7% | 39.3% | 15.3% | 19.4% |
| Visit friends/ family | 18.1% | 5.9% | 16.3% | 0.0% | 14.4% | 16.3% |
| Volunteer- non-profit | 2.4% | 4.3% | 16.3% | 39.3% | 1.4% | 3.1% |

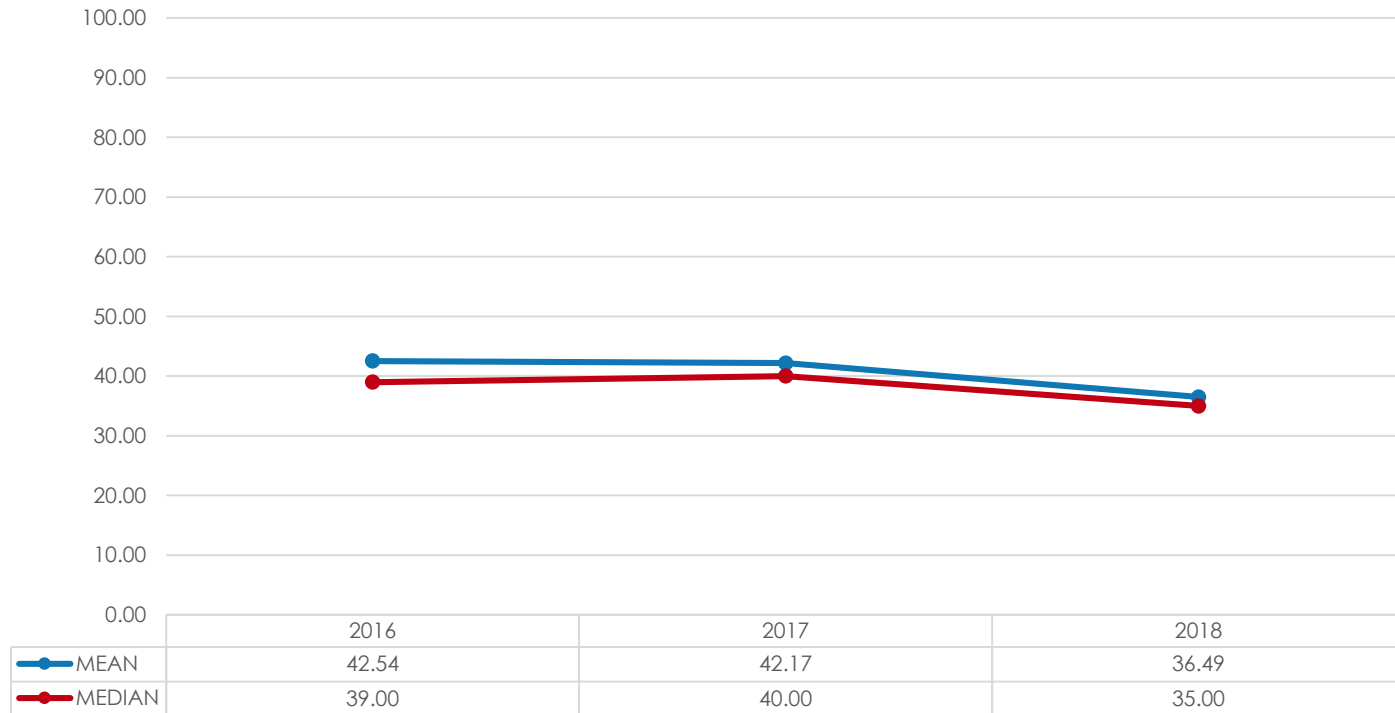
VISITOR PROFILE – GENDER – CHINA



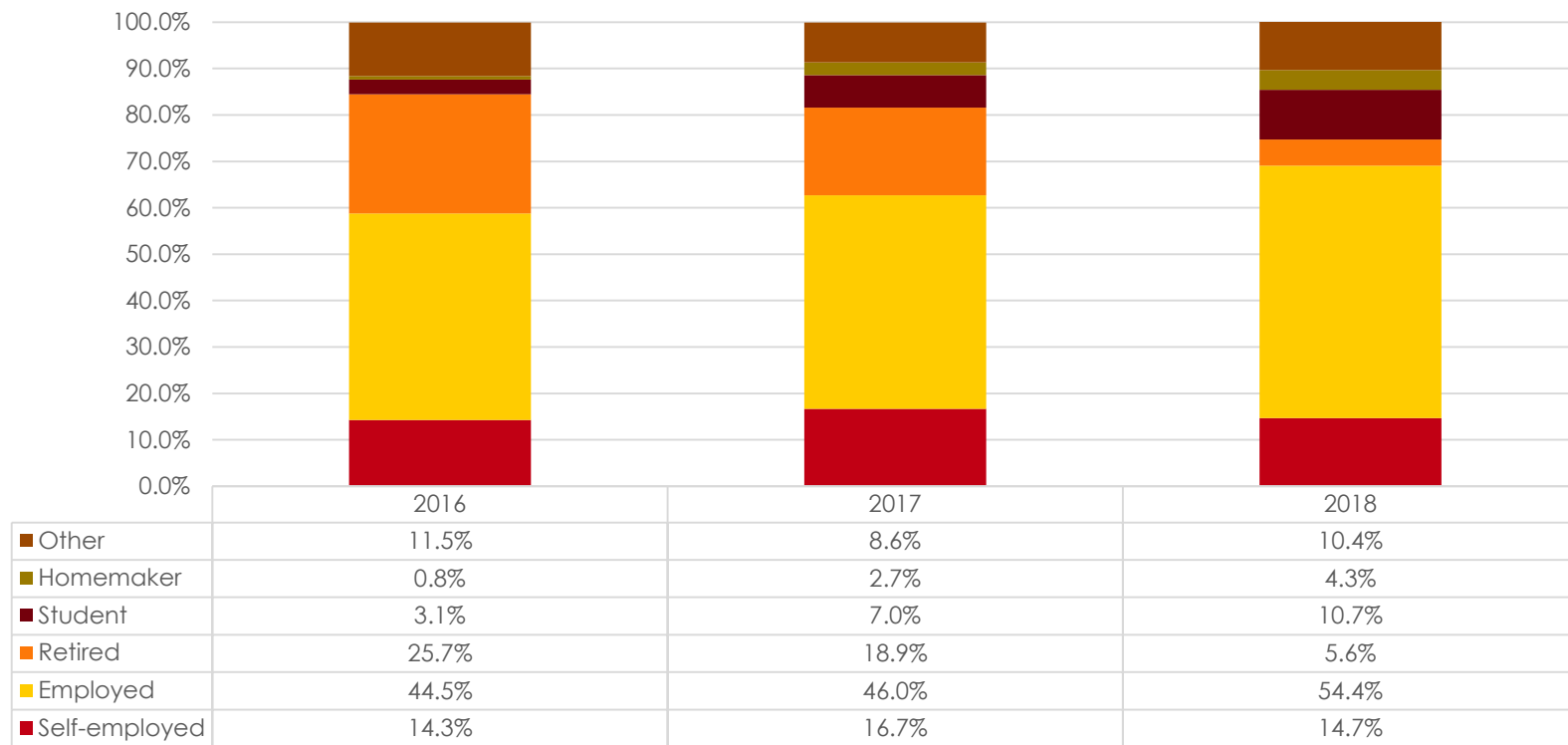
VISITOR PROFILE – EDUCATION – CHINA



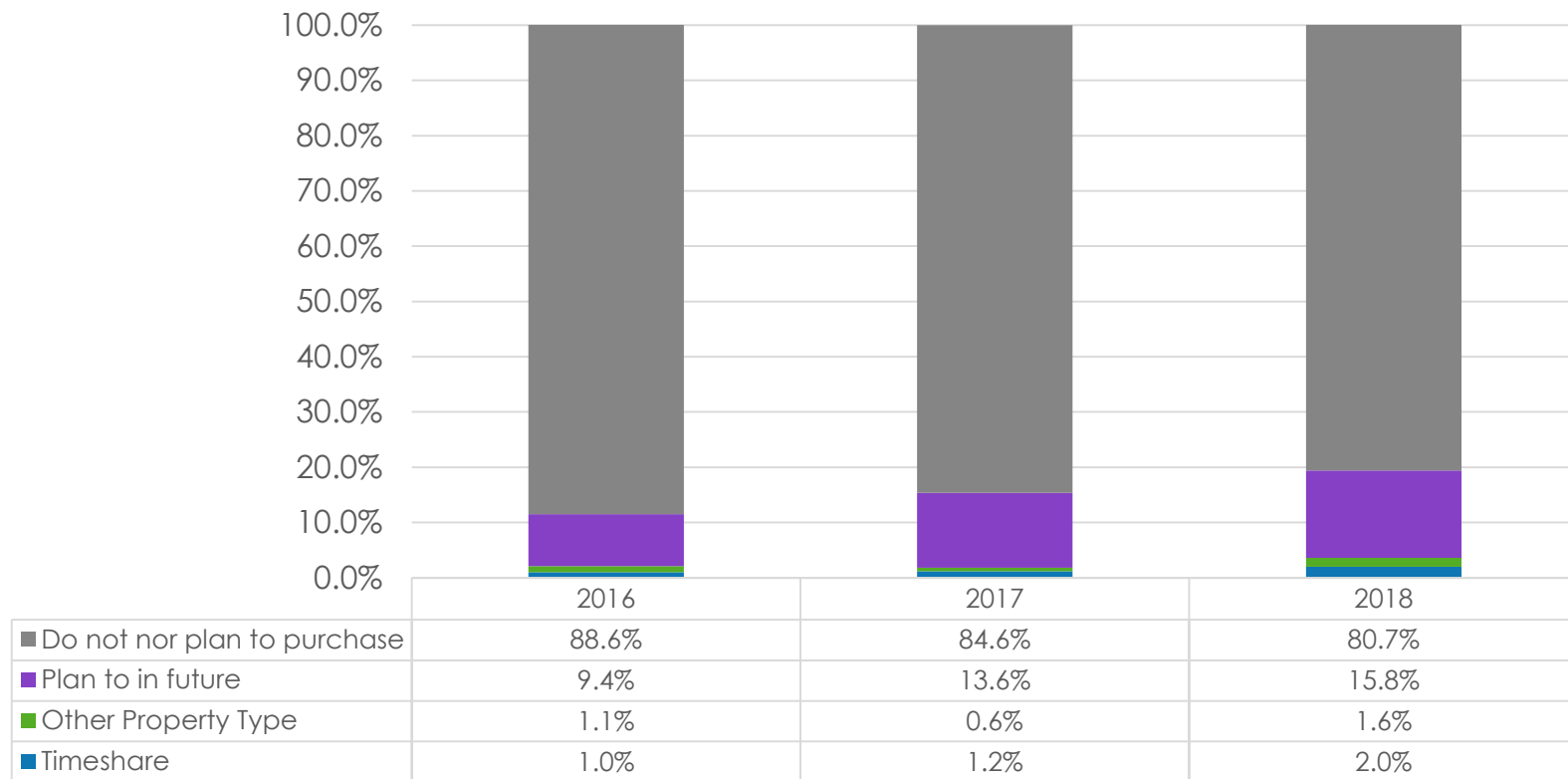
VISITOR PROFILE – AGE – CHINA



VISITOR PROFILE – EMPLOYMENT STATUS – CHINA



VISITOR PROFILE – HAWAII PROPERTY OWNER – CHINA



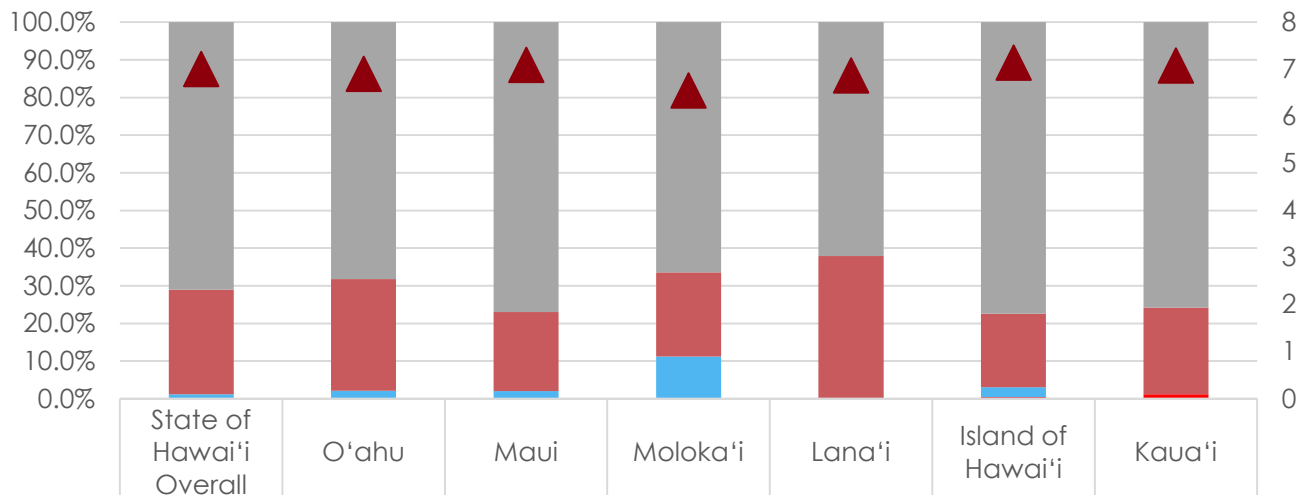
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

| | Chinese |
|-------------------------|---------|
| < ¥250,799 | 30.4% |
| ¥250,800 - ¥376,099 | 23.0% |
| ¥376,100 - ¥501,399 | 15.4% |
| ¥501,400 - ¥626,799 | 8.0% |
| ¥626,800 - ¥783,499 | 5.4% |
| ¥783,500 - ¥940,199 | 6.3% |
| ¥940,200 - ¥1,096,899 | 2.8% |
| ¥1,096,900 - ¥1,253,599 | 3.2% |
| ¥1,253,600 - ¥1,560,799 | 1.8% |
| ¥1,560,800+ | 3.7% |

SECTION – KOREA

OVERALL SATISFACTION – MOST RECENT VISIT – KOREA

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



| | | | | | | | |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Extremely satisfied (7-8) | 71.0% | 68.2% | 77.0% | 66.5% | 62.1% | 77.4% | 75.9% |
| ■ Somewhat satisfied (5-6) | 27.8% | 29.7% | 21.0% | 22.4% | 37.9% | 19.5% | 23.0% |
| ■ Somewhat dissatisfied (3-4) | 1.0% | 1.9% | 2.0% | 11.2% | 0.0% | 2.7% | 0.0% |
| ■ Not at all satisfied (1-2) | 0.2% | 0.2% | 0.0% | 0.0% | 0.0% | 0.4% | 1.2% |
| BASE | 1,603 | 1,472 | 300 | 9 | 8 | 254 | 83 |
| ▲ MEAN | 7.00 | 6.90 | 7.09 | 6.55 | 6.87 | 7.14 | 7.08 |

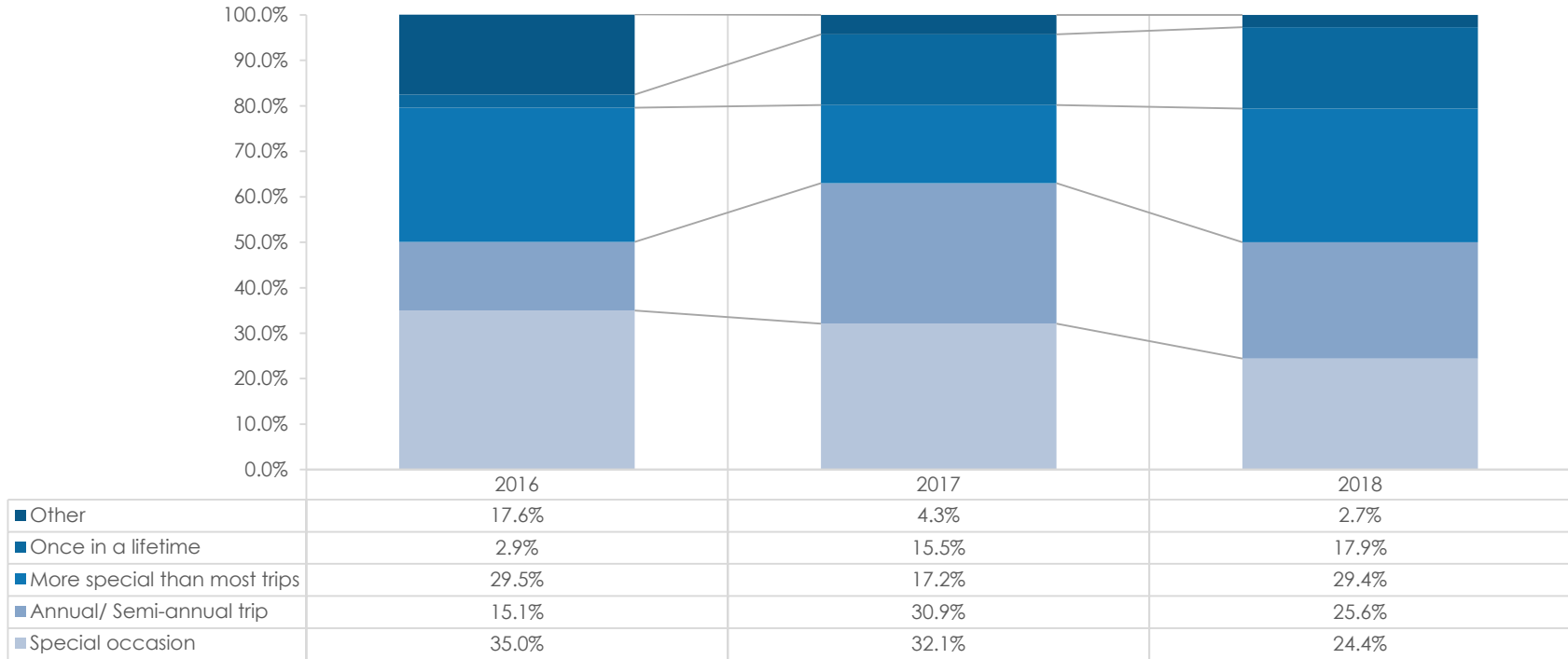
PRIMARY TRIP PURPOSE KOREA

| | 2017 | 2018 |
|--------------------------|-------|-------|
| Vacation | 47.3% | 52.7% |
| Honeymoon | 32.5% | 28.9% |
| Anniversary/ birthday | 3.9% | 3.8% |
| Incentive/ Reward | 3.3% | 3.1% |
| Get married/ vow renewal | 1.3% | 2.4% |
| Business trip | 1.5% | 1.5% |
| Education/ visit campus | 1.3% | 1.5% |

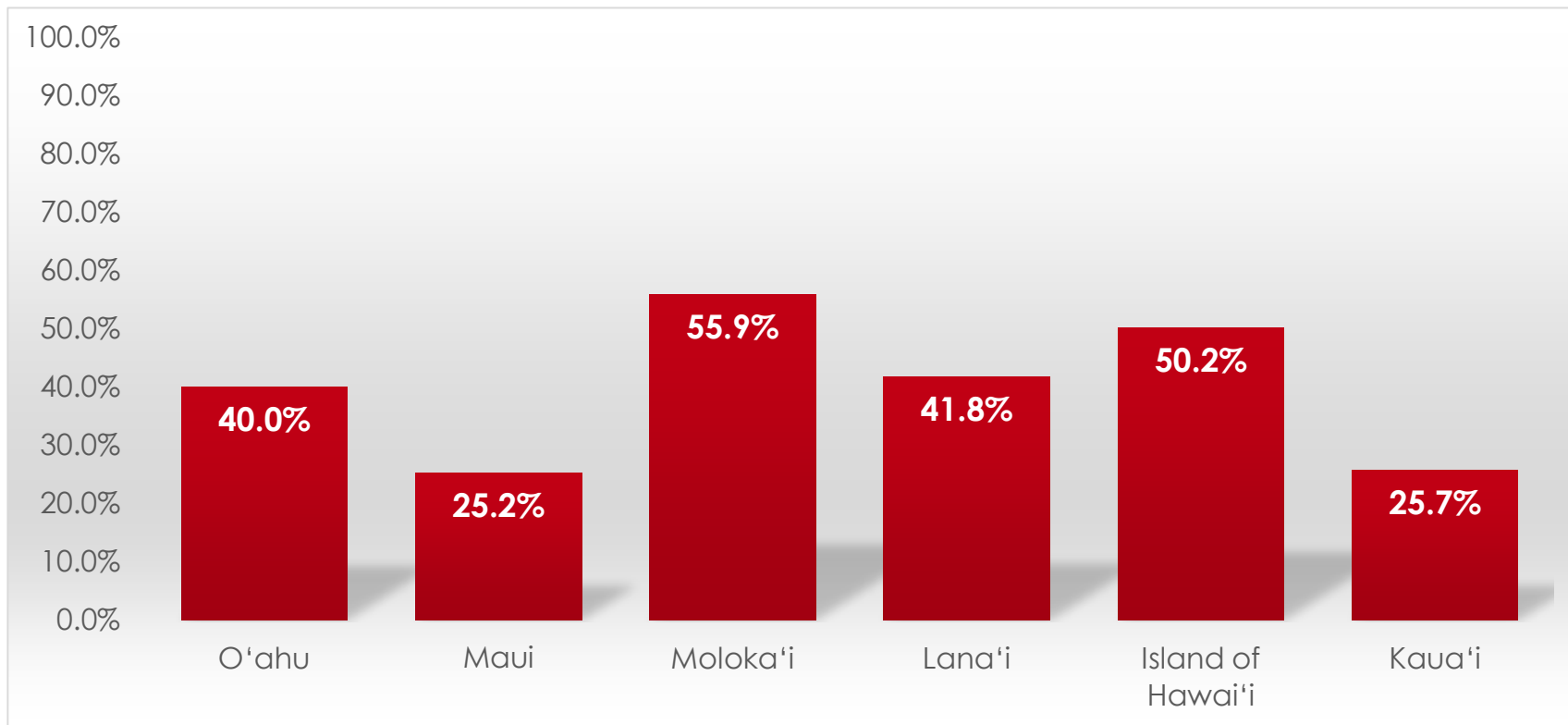
SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE KOREA

| | 2017 | 2018 |
|---------------------------|-------|-------|
| Vacation | 88.0% | 80.0% |
| Honeymoon | 35.6% | 31.6% |
| Shopping/ fashion | 27.1% | 13.9% |
| Anniversary/ birthday | 18.6% | 11.2% |
| Incentive/ Reward | 11.8% | 6.9% |
| Get married/ vow renewal | 5.5% | 5.8% |
| Visit friends/ relatives | 7.7% | 2.7% |
| Family gathering/ reunion | 8.0% | 2.7% |
| Business trip | 2.4% | 2.7% |

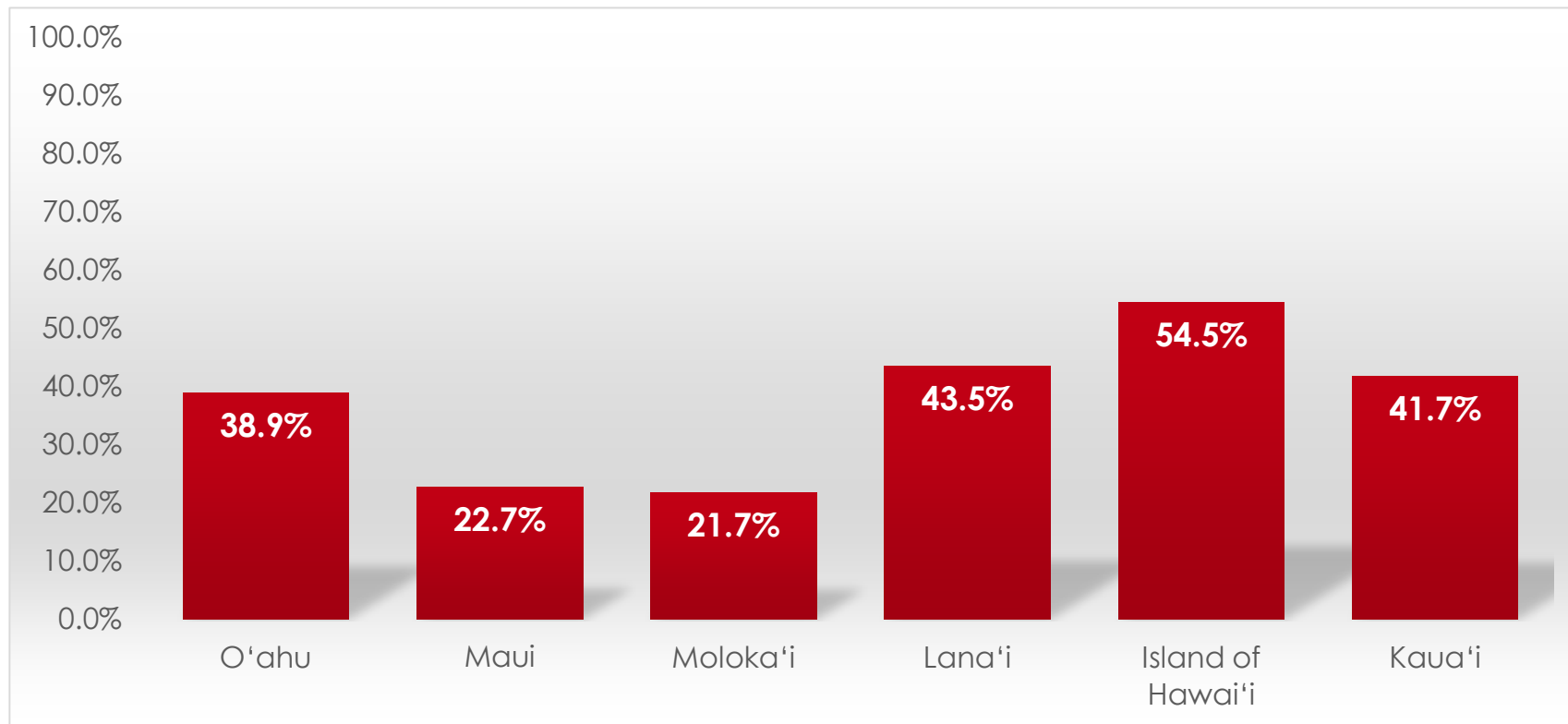
VACATION TRIP DESCRIPTION – KOREA



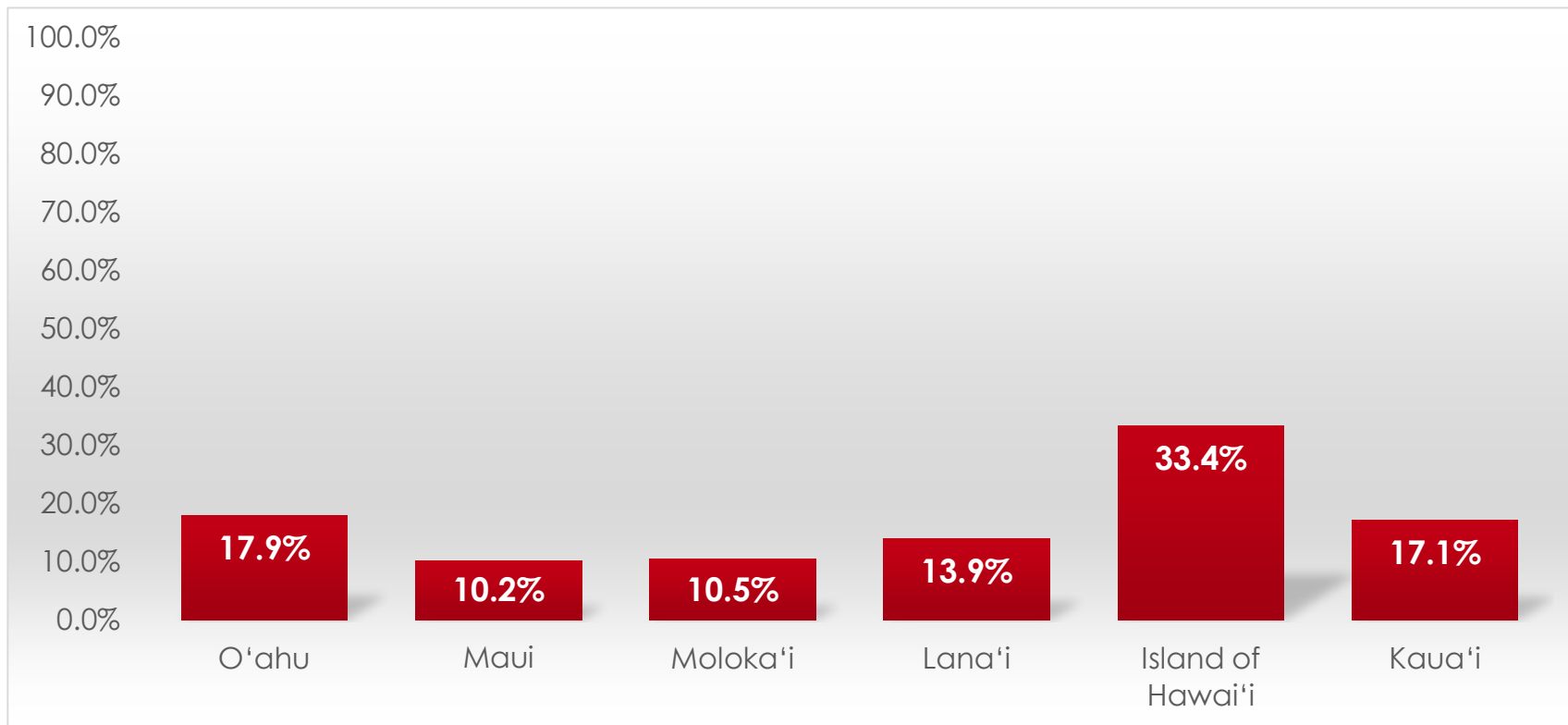
ADVERTISING AWARENESS – KOREA



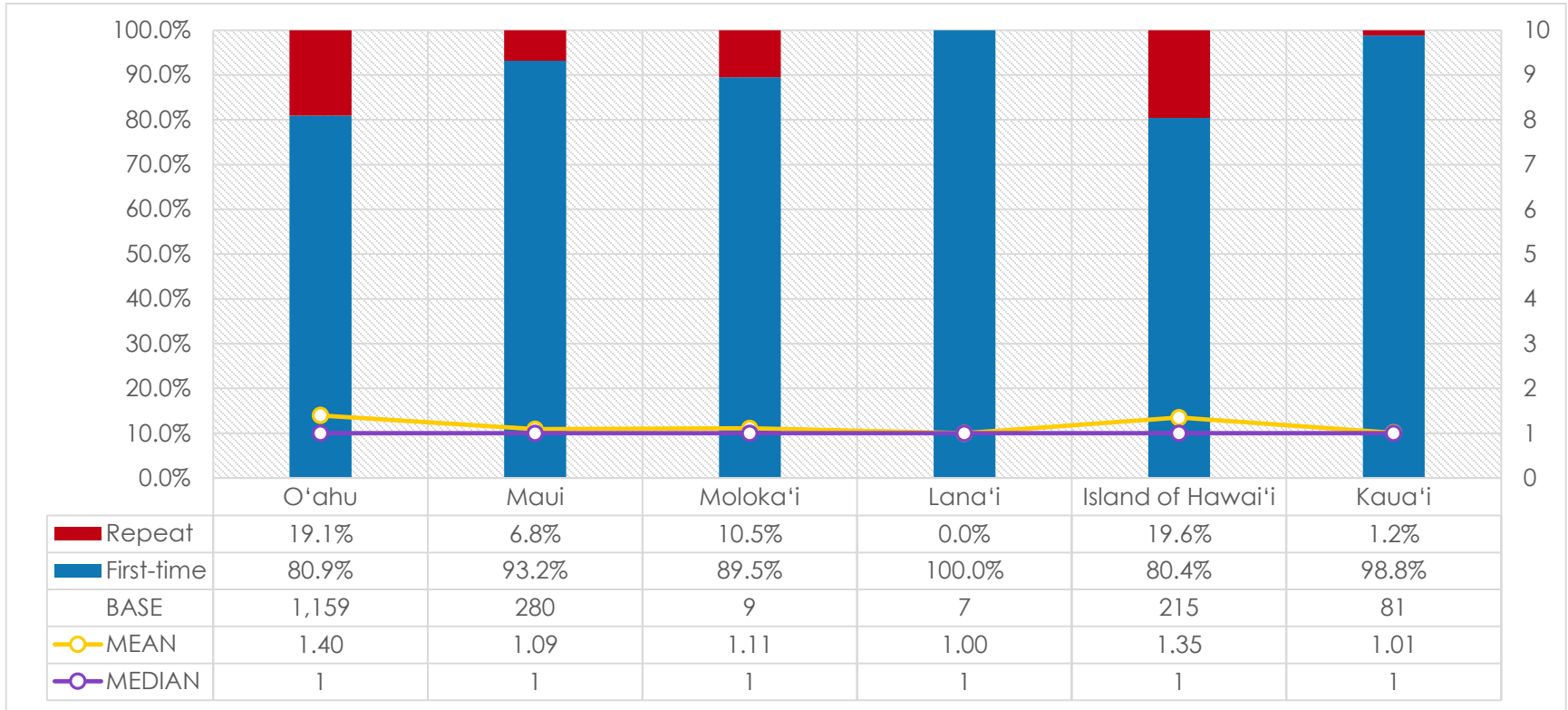
IMPACT OF LOCATION FILMING – KOREA



IMPACT OF HAWAIIAN MUSIC – KOREA



1ST TIME VS REPEAT VISITOR – KOREA

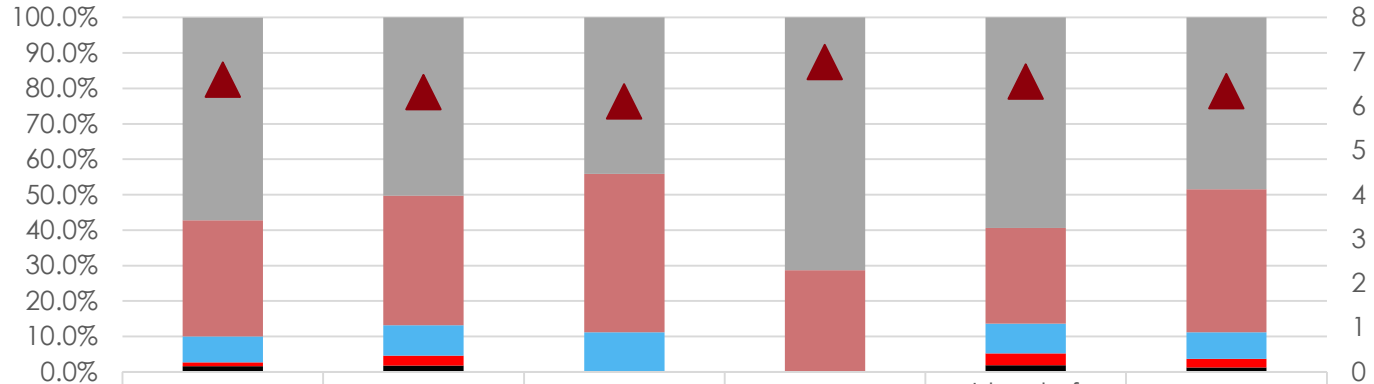


TRAVEL PARTY MEMBERS – KOREA

| | 2016 | 2017 | 2018 |
|------------------------------|-------|-------|-------|
| Spouse | 65.0% | 68.7% | 62.0% |
| Other adult family | 18.2% | 17.2% | 16.4% |
| Child under 18 | 11.6% | 17.4% | 14.6% |
| Friends/ associates | 13.8% | 12.2% | 14.2% |
| Alone | 4.5% | 4.7% | 3.1% |
| Girlfriend/ boyfriend | 3.5% | 2.5% | 7.4% |
| Same-sex partner | .3% | .3% | 0.2% |

LIKELIHOOD OF RETURN VISIT – KOREA

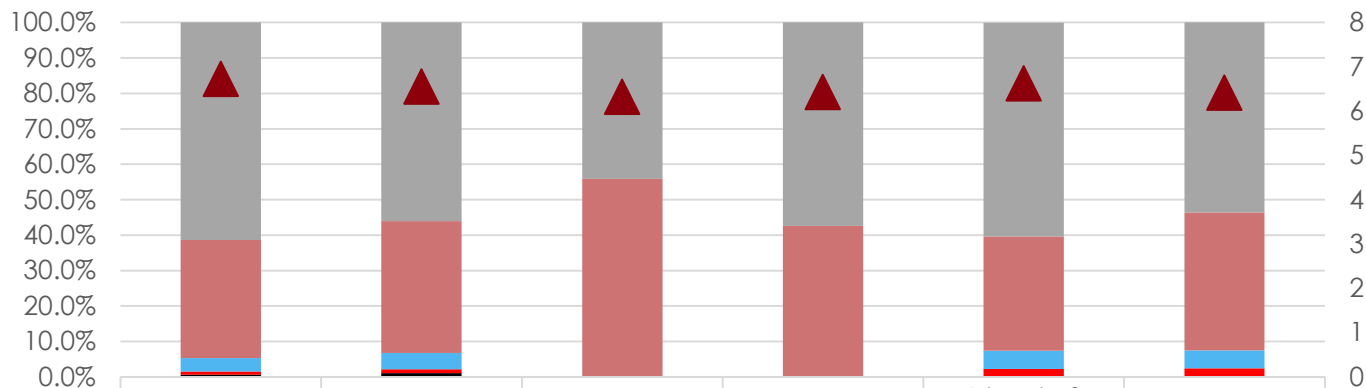
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|-------------------------|-------|-------|----------|--------|-------------------|--------|
| Very likely (7-8) | 57.1% | 50.3% | 44.1% | 71.3% | 59.4% | 48.6% |
| Somewhat likely (5-6) | 32.8% | 36.5% | 44.7% | 28.7% | 27.0% | 40.3% |
| Somewhat unlikely (3-4) | 7.3% | 8.6% | 11.2% | 0.0% | 8.4% | 7.5% |
| Very unlikely (1-2) | 1.1% | 2.8% | 0.0% | 0.0% | 3.3% | 2.4% |
| Not sure | 1.6% | 1.8% | 0.0% | 0.0% | 1.9% | 1.3% |
| BASE | 1,158 | 280 | 9 | 7 | 215 | 80 |
| MEAN | 6.59 | 6.31 | 6.10 | 6.99 | 6.55 | 6.33 |

BRAND/DESTINATION ADVOCACY – KOREA

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



| | O'ahu | Maui | Moloka'i | Lana'i | Island of Hawai'i | Kaua'i |
|---------------------------|-------|-------|----------|--------|-------------------|--------|
| ■ Very likely (7-8) | 61.5% | 56.1% | 44.1% | 57.4% | 60.3% | 53.7% |
| ■ Somewhat likely (5-6) | 33.3% | 37.2% | 55.9% | 42.6% | 32.2% | 38.9% |
| ■ Somewhat unlikely (3-4) | 3.8% | 4.6% | 0.0% | 0.0% | 5.1% | 5.1% |
| ■ Very unlikely (1-2) | 0.9% | 1.1% | 0.0% | 0.0% | 2.3% | 2.4% |
| ■ Not sure | 0.6% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| BASE | 1,158 | 280 | 9 | 7 | 215 | 80 |
| ▲ MEAN | 6.72 | 6.55 | 6.32 | 6.43 | 6.62 | 6.41 |

ACTIVITIES – SIGHTSEEING – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 94.8% | 97.2% | 100.0% | 100.0% | 95.7% | 96.2% |
| On own (self-guided) | 75.5% | 84.0% | 66.5% | 86.1% | 75.2% | 61.1% |
| Helicopter/ airplane | 3.1% | 2.9% | 0.0% | 0.0% | 14.9% | 15.0% |
| Boat/ submarine/ whale | 14.7% | 18.2% | 44.1% | 27.8% | 16.9% | 6.1% |
| Visit towns | 38.0% | 20.7% | 11.2% | 0.0% | 36.0% | 20.2% |
| Limo/ van/ bus tour | 15.7% | 8.2% | 11.2% | 14.8% | 14.0% | 22.5% |
| Scenic views/ natural landmark | 55.2% | 46.8% | 11.2% | 28.7% | 47.3% | 49.9% |
| Movie/ TV/ film location | 14.0% | 3.6% | 0.0% | 0.0% | 15.0% | 16.3% |

STATEWIDE - ACTIVITIES – SIGHTSEEING - KOREA

| | 2017 | 2018 |
|---------------------------------------|-------|-------|
| TOTAL | 98.6% | 95.6% |
| On own (self-guided) | 72.7% | 76.9% |
| Helicopter/ airplane | 8.2% | 5.4% |
| Boat/ submarine/ whale | 13.4% | 16.2% |
| Visit towns | 14.4% | 35.3% |
| Limo/ van/ bus tour | 20.3% | 15.3% |
| Scenic views/ natural landmark | 53.1% | 53.3% |
| Movie/ TV/ film location | 13.0% | 12.8% |

ACTIVITIES – RECREATION – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|--|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 98.7% | 95.7% | 100.0% | 100.0% | 96.7% | 87.4% |
| Beach/ sunbathing | 82.5% | 71.5% | 44.7% | 56.5% | 68.6% | 51.0% |
| Bodyboard/ Standup paddle board | 6.4% | 4.5% | 11.2% | 0.0% | 8.4% | 3.7% |
| Surfing | 11.0% | 6.0% | 11.2% | 13.9% | 15.1% | 2.5% |
| Canoeing/ kayak | 5.3% | 1.1% | 0.0% | 0.0% | 5.2% | 2.4% |
| Swim- ocean | 51.9% | 34.6% | 22.4% | 86.1% | 44.4% | 21.0% |
| Snorkel | 46.0% | 42.9% | 88.8% | 43.5% | 45.0% | 15.0% |
| Windsurf/ Kitesurf | 1.6% | 0.3% | 0.0% | 0.0% | 0.9% | 0.0% |
| Jet ski/ Parasail | 6.8% | 1.4% | 0.0% | 0.0% | 4.7% | 0.0% |
| Scuba | 4.4% | 2.5% | 21.7% | 0.0% | 1.8% | 0.0% |
| Fishing | 2.0% | 1.4% | 0.0% | 0.0% | 0.5% | 0.0% |
| Golf | 4.2% | 1.0% | 0.0% | 28.7% | 0.9% | 3.8% |

STATEWIDE - ACTIVITIES – RECREATION – KOREA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 94.7% | 97.9% |
| Beach/ sunbathing | 71.8% | 78.5% |
| Bodyboard/ Standup paddle board | 9.5% | 6.7% |
| Surfing | 11.6% | 10.7% |
| Canoeing/ kayak | 6.1% | 4.7% |
| Swim- ocean | NA | 49.0% |
| Snorkel | NA | 45.4% |
| Windsurf/ Kitesurf | 1.0% | 1.3% |
| Jet ski/ Parasail | 7.7% | 5.7% |
| Scuba | 3.9% | 3.9% |
| Fishing | 2.2% | 1.6% |
| Golf | 3.5% | 3.6% |

ACTIVITIES – RECREATION – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.7% | 95.7% | 100.0% | 100.0% | 96.7% | 87.4% |
| Run/ Jog/ Fitness walk | 9.4% | 6.1% | 0.0% | 13.9% | 8.5% | 4.9% |
| Spa | 5.7% | 6.8% | 0.0% | 27.8% | 5.1% | 6.3% |
| Hiking/Backpack/Camp | 12.4% | 17.1% | 0.0% | 0.0% | 16.8% | 14.9% |
| Agritourism | 20.3% | 6.0% | 0.0% | 14.8% | 18.6% | 31.2% |
| Sport event/ tournament | 1.7% | 1.4% | 0.0% | 0.0% | 3.8% | 1.3% |
| Park/ botanical garden | 25.9% | 17.8% | 0.0% | 0.0% | 25.6% | 17.6% |
| Waterpark | 3.5% | 3.9% | 0.0% | 0.0% | 5.2% | 0.0% |
| Mountain tube/ waterfall rappel | 0.3% | 2.5% | 0.0% | 0.0% | 4.2% | 3.8% |
| Zip-lining | 1.6% | 1.4% | 0.0% | 13.9% | 1.4% | 1.3% |
| Skydiving | 4.3% | 0.0% | 0.0% | 0.0% | 4.2% | 0.0% |
| All terrain vehicle (ATV) | 7.7% | 1.1% | 0.0% | 28.7% | 6.1% | 0.0% |
| Horseback riding | 4.5% | 0.4% | 0.0% | 0.0% | 1.4% | 0.0% |

STATEWIDE - ACTIVITIES – RECREATION – KOREA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 94.7% | 97.9% |
| Run/ Jog/ Fitness walk | 6.8% | 8.7% |
| Spa | 6.4% | 6.0% |
| Hiking/Backpack/Camp | 13.9% | 13.5% |
| Agritourism | 18.8% | 19.3% |
| Sport event/ tournament | 2.3% | 2.1% |
| Park/ botanical garden | 23.6% | 25.3% |
| Waterpark | NA | 3.9% |
| Mountain tube/ waterfall rappel | NA | 1.4% |
| Zip-lining | NA | 1.6% |
| Skydiving | NA | 3.5% |
| All terrain vehicle (ATV) | NA | 6.6% |
| Horseback riding | NA | 3.4% |

ACTIVITIES – ENTERTAINMENT & DINING – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|--|-------|-------|----------|--------|------------------|--------|
| TOTAL | 98.9% | 98.2% | 100.0% | 100.0% | 98.2% | 96.3% |
| Lunch/ sunset/ dinner/ evening cruise | 37.3% | 31.0% | 11.2% | 71.3% | 38.3% | 27.4% |
| Live music/ stage show | 15.5% | 8.6% | 0.0% | 13.9% | 18.3% | 3.7% |
| Nightclub/ dancing/ bar/ karaoke | 11.0% | 2.9% | 0.0% | 13.9% | 5.2% | 0.0% |
| Fine dining | 60.4% | 45.7% | 22.4% | 42.6% | 42.5% | 23.9% |
| Family restaurant | 38.9% | 32.4% | 11.2% | 27.8% | 37.8% | 16.1% |
| Fast food | 53.2% | 34.7% | 22.4% | 13.9% | 50.4% | 30.0% |
| Food truck | 53.2% | 24.6% | 11.2% | 28.7% | 43.6% | 18.6% |
| Café/ coffee house | 58.9% | 37.5% | 33.5% | 13.9% | 46.2% | 31.2% |
| Ethnic dining | 24.0% | 26.1% | 11.2% | 13.9% | 20.6% | 27.5% |
| Prepared own meal | 10.6% | 8.1% | 21.7% | 0.0% | 15.5% | 13.6% |

STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – KOREA

| | 2017 | 2018 |
|--|-------|-------|
| TOTAL | 97.5% | 98.8% |
| Lunch/ sunset/ dinner/ evening cruise | 47.5% | 37.0% |
| Live music/ stage show | 15.3% | 15.1% |
| Nightclub/ dancing/ bar/ karaoke | 6.4% | 9.0% |
| Fine dining | 49.7% | 55.2% |
| Family restaurant | 50.0% | 37.6% |
| Fast food | 54.8% | 50.2% |
| Food truck | NA | 47.5% |
| Café/ coffee house | 48.6% | 54.4% |
| Ethnic dining | 25.6% | 24.6% |
| Prepared own meal | 16.3% | 11.3% |

ACTIVITIES – SHOPPING – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|-------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 97.8% | 94.6% | 77.6% | 86.1% | 98.6% | 80.1% |
| Mall/ department store | 85.3% | 46.4% | 11.2% | 43.5% | 72.3% | 21.4% |
| Designer boutique | 5.2% | 2.9% | 0.0% | 0.0% | 3.2% | 1.3% |
| Hotel/ resort store | 32.8% | 17.9% | 11.2% | 13.9% | 25.8% | 13.7% |
| Swap meet/ flea market | 3.5% | 2.8% | 0.0% | 0.0% | 5.7% | 0.0% |
| Discount/ outlet store | 66.2% | 51.2% | 44.1% | 28.7% | 55.6% | 21.4% |
| Supermarket | 60.1% | 45.0% | 32.9% | 71.3% | 54.1% | 41.0% |
| Farmer's market | 10.2% | 7.1% | 0.0% | 13.9% | 14.0% | 6.2% |
| Convenience store | 47.7% | 26.0% | 22.4% | 13.9% | 42.5% | 24.8% |
| Duty free store | 52.8% | 13.6% | 11.2% | 13.9% | 44.0% | 8.8% |
| Local shop/ artisan | 14.7% | 13.2% | 11.2% | 27.8% | 15.9% | 11.2% |

STATEWIDE - ACTIVITIES – SHOPPING – KOREA

| | 2017 | 2018 |
|-------------------------------|-------|-------|
| TOTAL | 97.7% | 97.1% |
| Mall/ department store | 77.8% | 77.2% |
| Designer boutique | 4.4% | 4.6% |
| Hotel/ resort store | 26.4% | 30.2% |
| Swap meet/ flea market | 6.2% | 3.6% |
| Discount/ outlet store | 72.4% | 61.6% |
| Supermarket | 52.5% | 57.1% |
| Farmer's market | 7.2% | 10.3% |
| Convenience store | 48.9% | 43.3% |
| Duty free store | 40.1% | 45.8% |
| Local shop/ artisan | 16.0% | 14.7% |

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|---|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 67.5% | 49.8% | 44.1% | 56.5% | 70.1% | 65.1% |
| Historic military site | 21.9% | 7.2% | 0.0% | 0.0% | 15.3% | 7.6% |
| Other historical site | 27.5% | 25.3% | 21.7% | 28.7% | 27.5% | 38.9% |
| Museum/ art gallery | 7.5% | 5.7% | 0.0% | 0.0% | 7.0% | 6.3% |
| Luau/ Polynesian show/ hula show | 22.8% | 10.3% | 11.2% | 28.7% | 28.6% | 7.4% |
| Lesson- ex. ukulele, hula, canoe, lei making | 5.5% | 3.2% | 11.2% | 0.0% | 6.6% | 1.3% |
| Play/ concert/ theatre | 5.0% | 2.1% | 0.0% | 0.0% | 5.1% | 3.8% |
| Art/ craft fair | 5.6% | 5.3% | 0.0% | 13.9% | 5.1% | 6.2% |
| Festival event | 3.0% | 0.4% | 0.0% | 0.0% | 3.7% | 2.5% |

STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

| | 2017 | 2018 |
|---|-------|-------|
| TOTAL | 60.9% | 66.4% |
| Historic military site | 18.0% | 18.9% |
| Other historical site | 28.6% | 28.6% |
| Museum/ art gallery | 8.4% | 7.3% |
| Luau/ Polynesian show/ hula show | 24.1% | 21.9% |
| Lesson- ex. ukulele, hula, canoe, lei making | 2.9% | 5.2% |
| Play/ concert/ theatre | 3.0% | 4.7% |
| Art/ craft fair | 5.8% | 5.9% |
| Festival event | 1.1% | 2.7% |

ACTIVITIES – TRANSPORTATION – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAII | KAUA'I |
|---------------------------|-------|-------|----------|--------|------------------|--------|
| TOTAL | 94.8% | 96.8% | 100.0% | 85.2% | 94.9% | 95.0% |
| Airport shuttle | 17.5% | 6.1% | 11.2% | 27.8% | 14.4% | 6.3% |
| Trolley | 27.4% | 3.2% | 0.0% | 13.9% | 13.2% | 1.3% |
| Public bus | 14.7% | 1.8% | 0.0% | 0.0% | 10.2% | 2.5% |
| Tour bus/ tour van | 32.6% | 12.9% | 0.0% | 70.5% | 28.7% | 48.9% |
| Taxi/ limo | 23.6% | 6.4% | 0.0% | 27.8% | 20.5% | 6.3% |
| Rental car | 59.3% | 80.8% | 88.8% | 28.7% | 56.4% | 41.0% |
| Ride share | 8.6% | 2.8% | 0.0% | 0.0% | 6.9% | 1.3% |
| Bicycle rental | 1.5% | 0.4% | 0.0% | 0.0% | 0.9% | 0.0% |

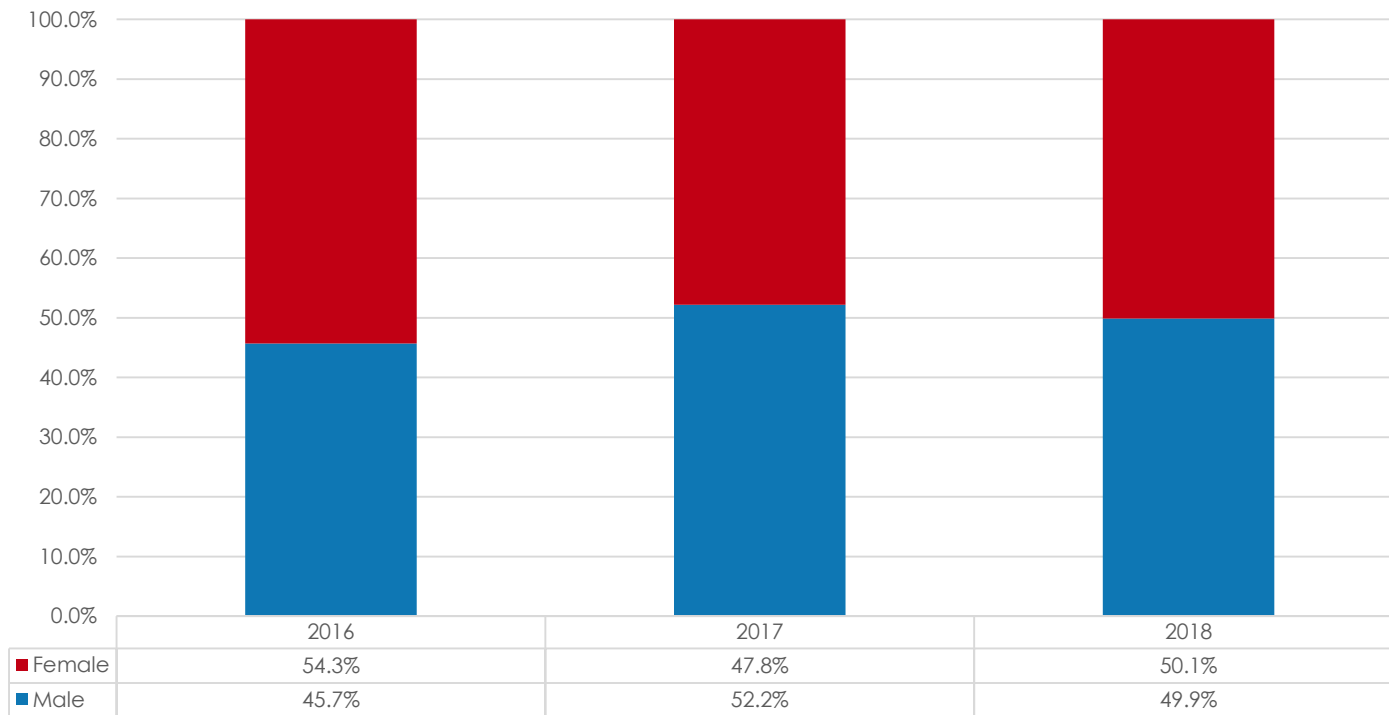
STATEWIDE - ACTIVITIES – TRANSPORTATION – KOREA

| | 2017 | 2018 |
|---------------------------|-------|-------|
| TOTAL | 98.8% | 95.5% |
| Airport shuttle | 18.8% | 15.9% |
| Trolley | 30.2% | 21.8% |
| Public bus | 15.5% | 12.2% |
| Tour bus/ tour van | 35.0% | 30.7% |
| Taxi/ limo | 21.5% | 20.7% |
| Rental car | 61.1% | 62.0% |
| Ride share | NA | 7.4% |
| Bicycle rental | NA | 1.3% |

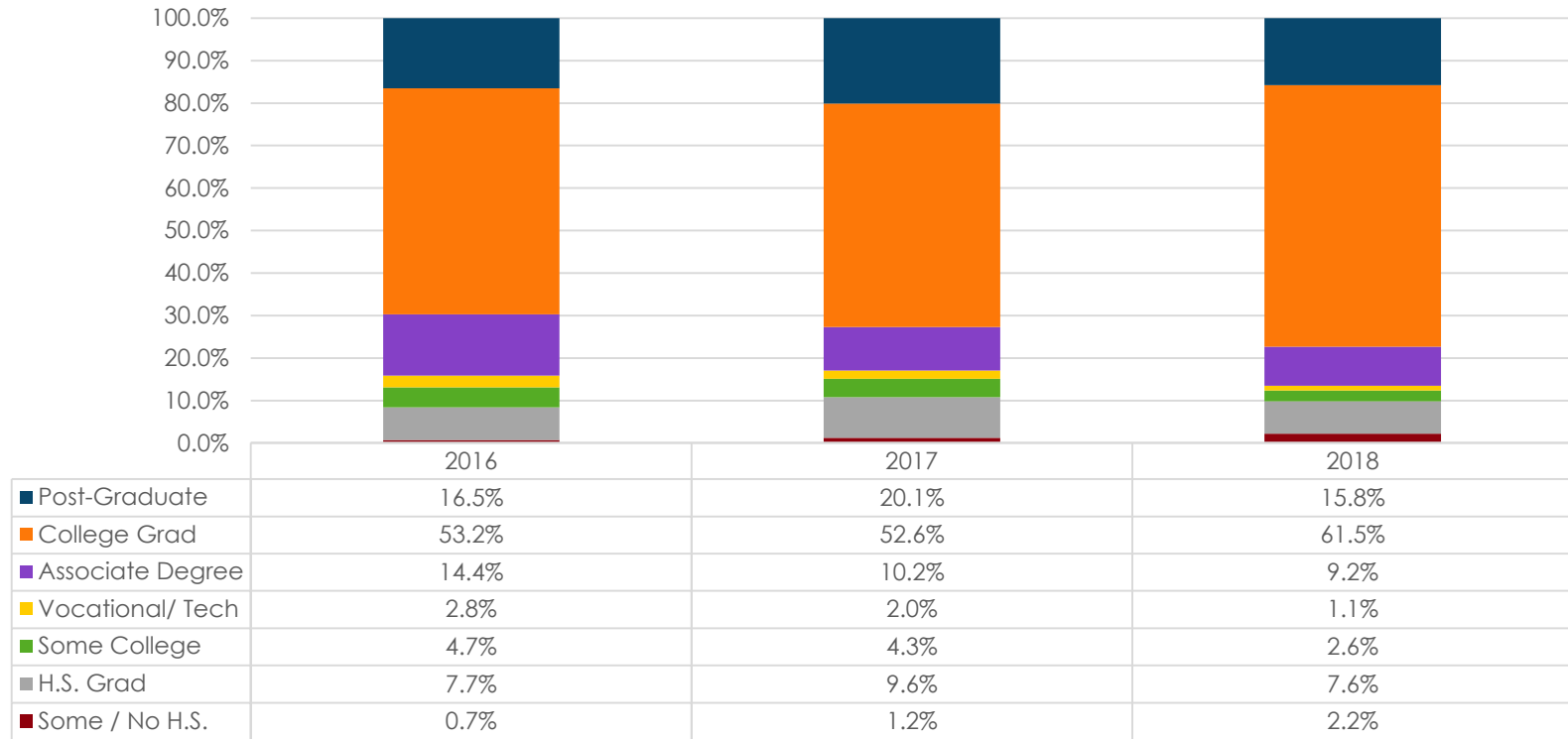
ACTIVITIES – OTHER – KOREA

| | O'AHU | MAUI | MOLOKA'I | LANA'I | ISLAND OF HAWAI'I | KAUA'I |
|------------------------------|-------|-------|----------|--------|-------------------|--------|
| TOTAL | 15.3% | 11.3% | 11.2% | 0.0% | 21.4% | 23.8% |
| Visit friends/ family | 14.1% | 9.5% | 11.2% | 0.0% | 17.6% | 22.5% |
| Volunteer- non-profit | 1.2% | 1.8% | 0.0% | 0.0% | 4.2% | 2.5% |

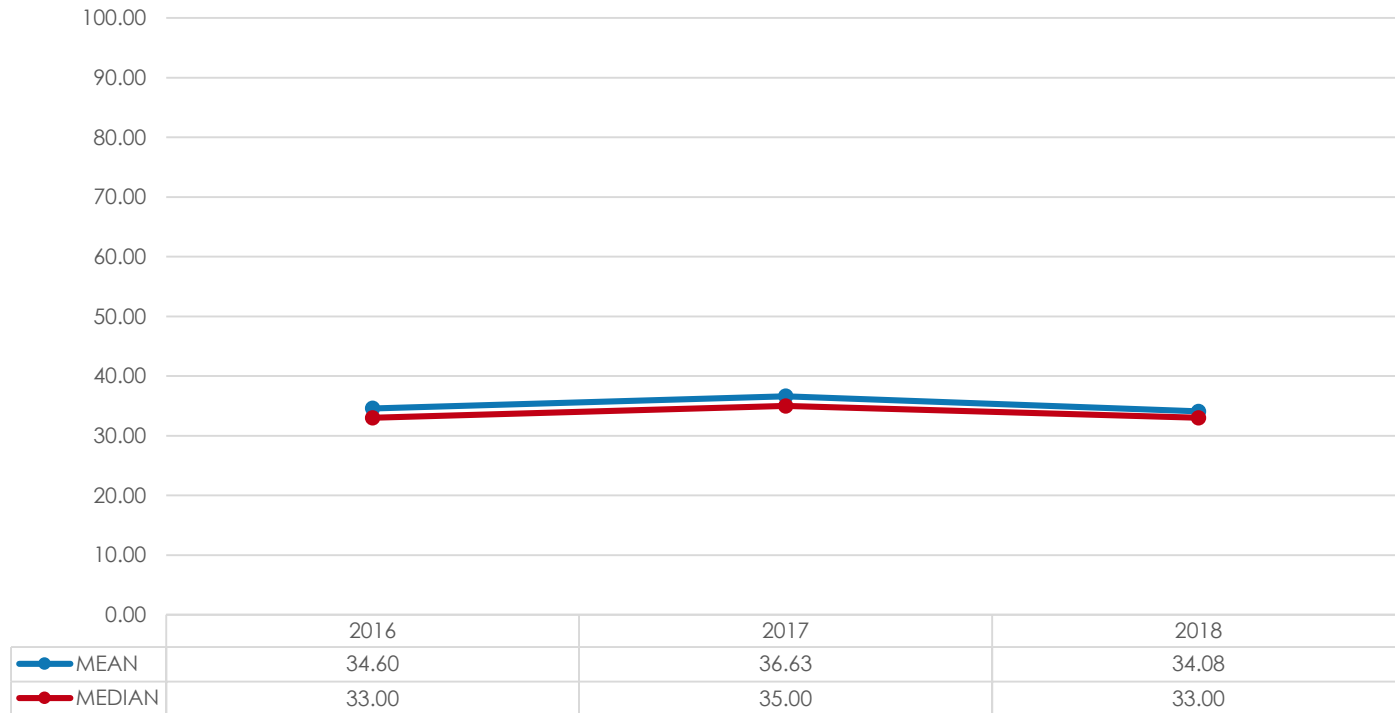
VISITOR PROFILE – GENDER – KOREA



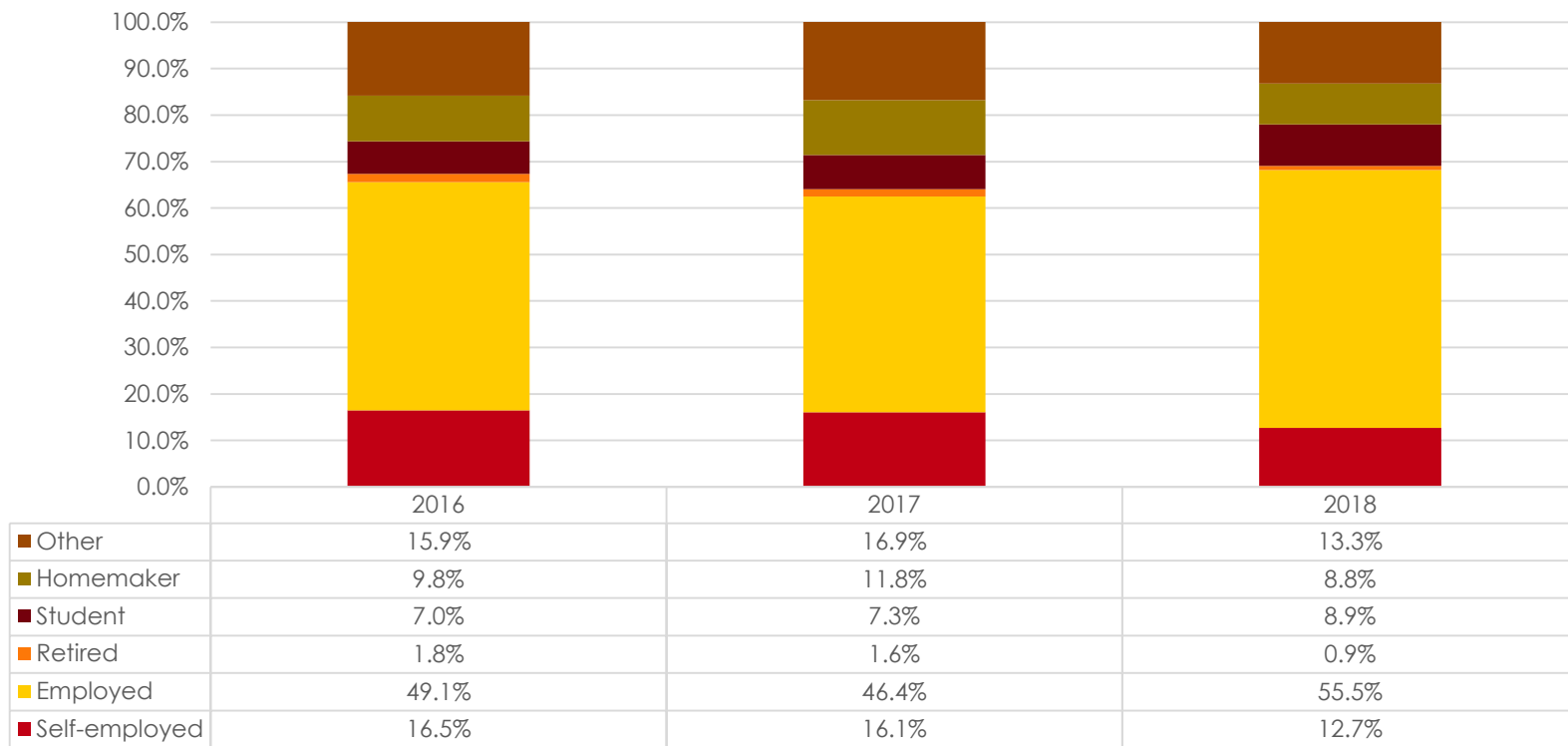
VISITOR PROFILE – EDUCATION – KOREA



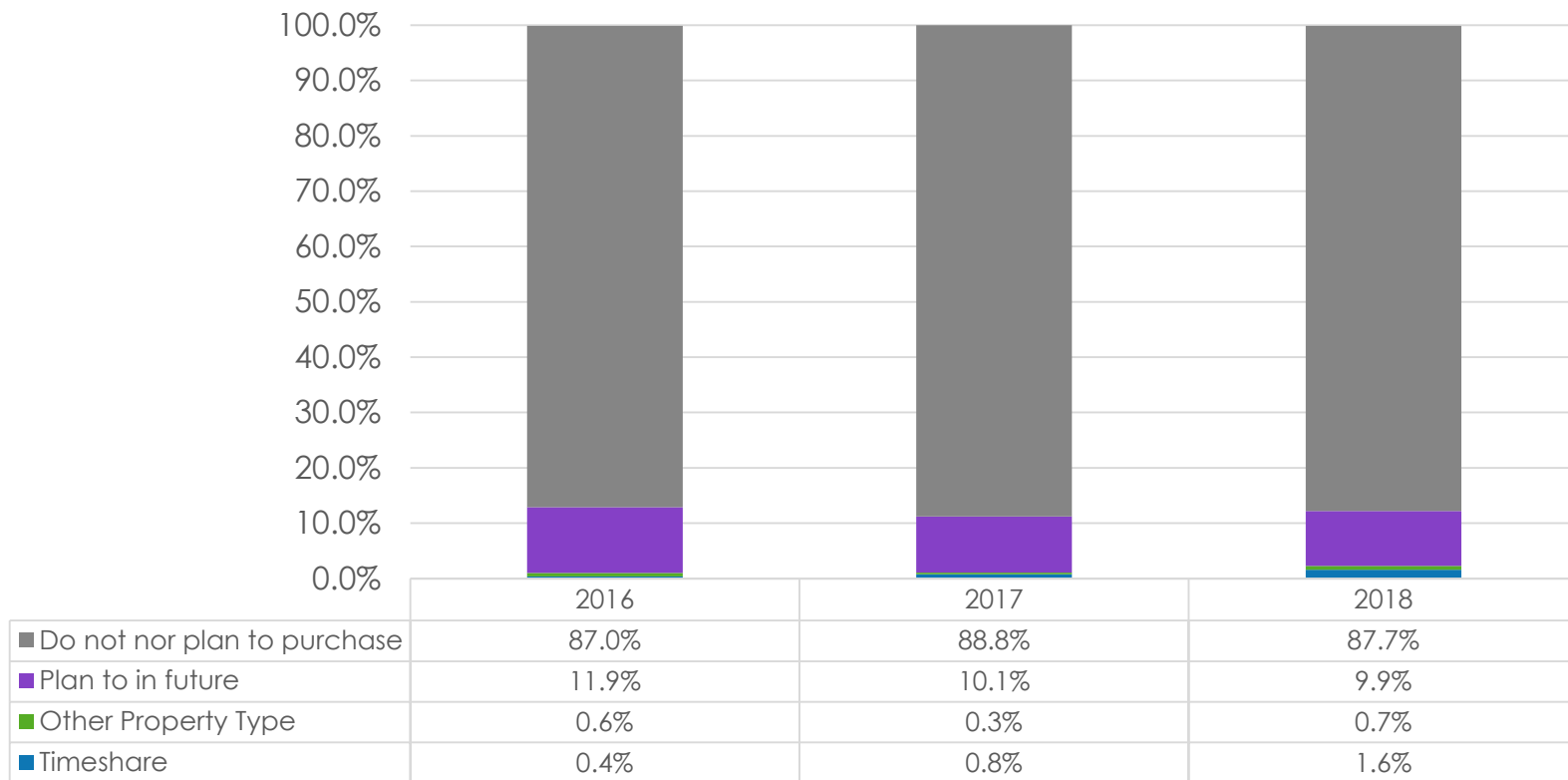
VISITOR PROFILE – AGE – KOREA



VISITOR PROFILE – EMPLOYMENT STATUS – KOREA



VISITOR PROFILE – HAWAII PROPERTY OWNER – KOREA

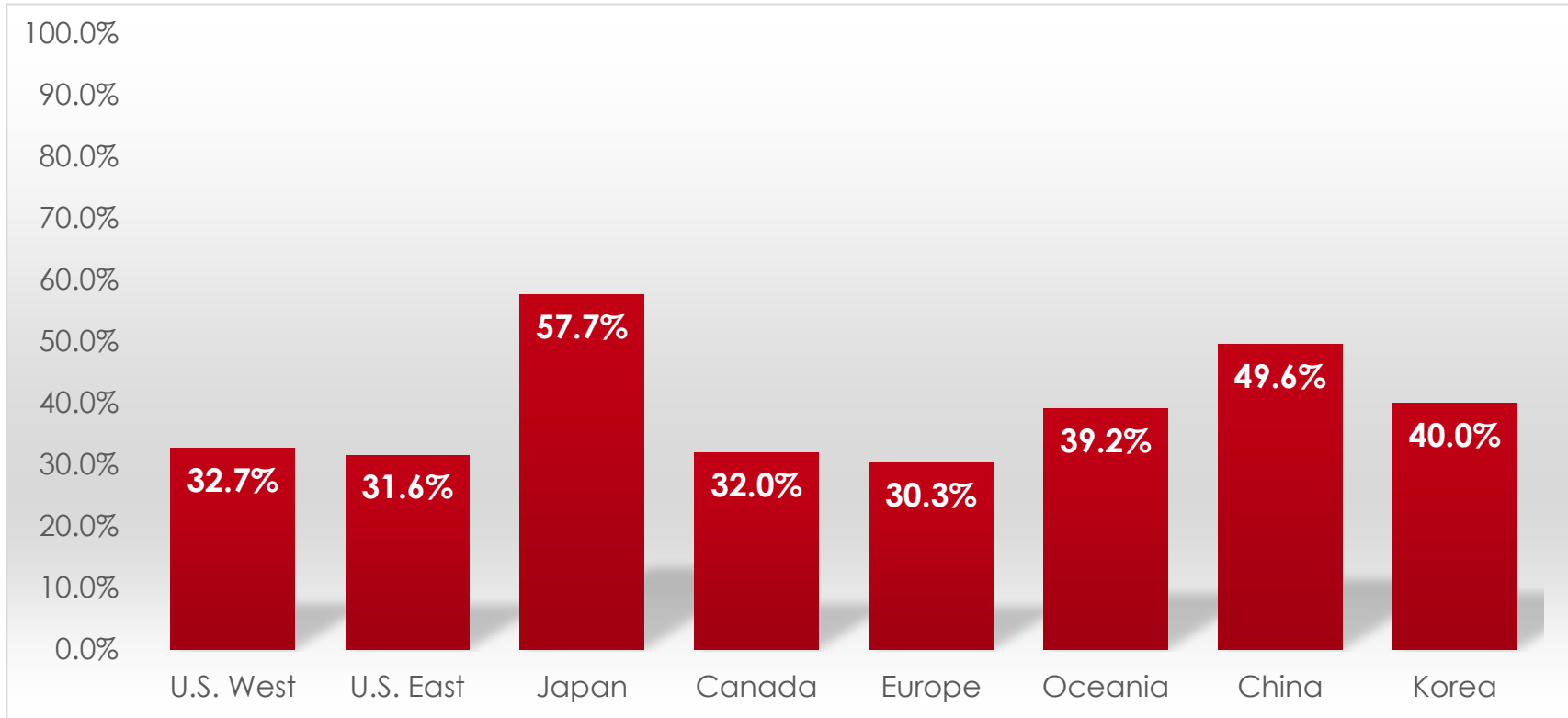


VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

| | Korean |
|-------------------------|--------|
| < ₩16,305,000 | 16.0% |
| ₩16,305,000-21,171,999 | 9.3% |
| ₩27,174,000-38,041,999 | 16.6% |
| ₩38,044,000-48,911,999 | 10.2% |
| ₩48,912,000-59,781,999 | 10.4% |
| ₩59,782,000-70,652,999 | 11.9% |
| ₩70,653,000-81,520,999 | 7.1% |
| ₩81,521,000-92,390,999 | 3.5% |
| ₩92,391,000-103,259,999 | 4.3% |
| ₩103,260,000+ | 10.9% |

SECTION – O‘AHU

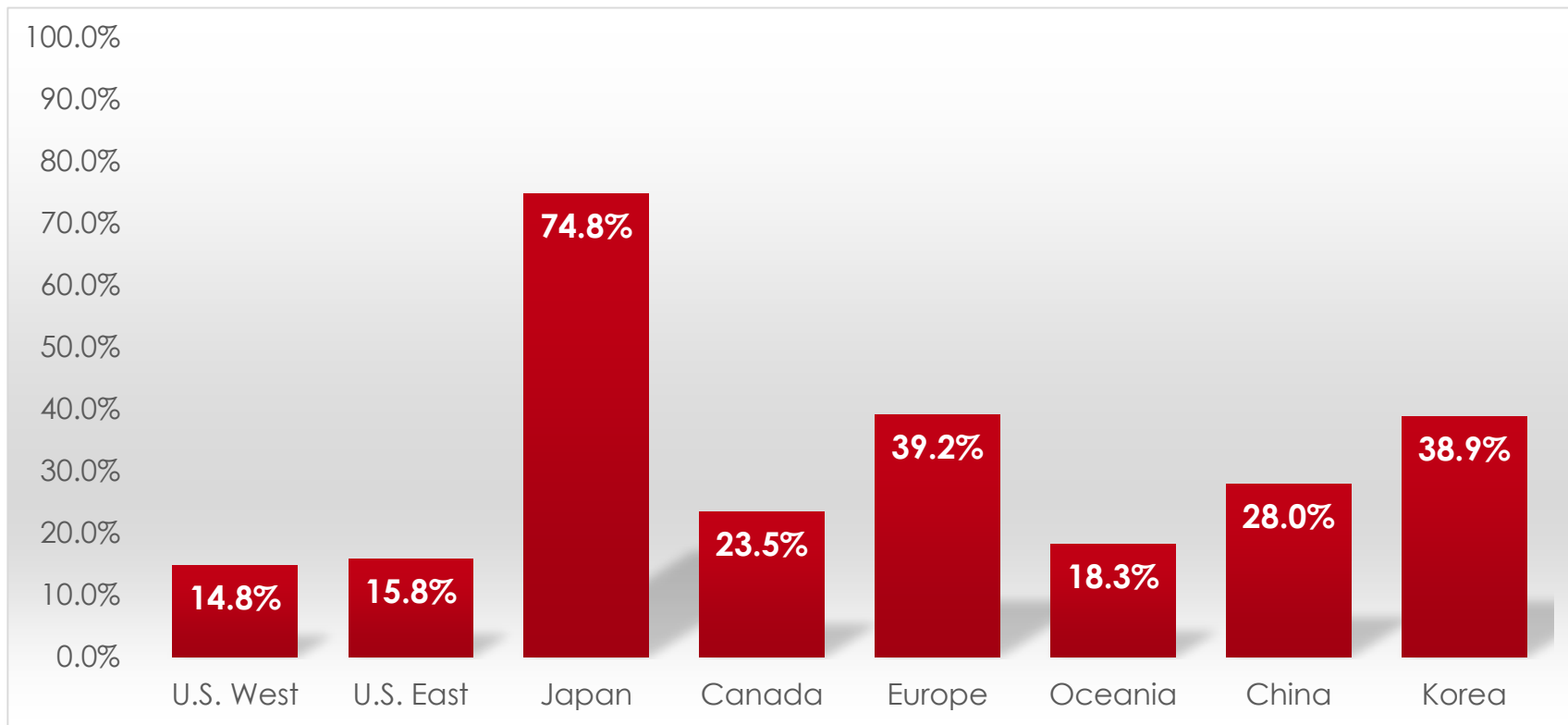
ADVERTISING AWARENESS – O‘AHU



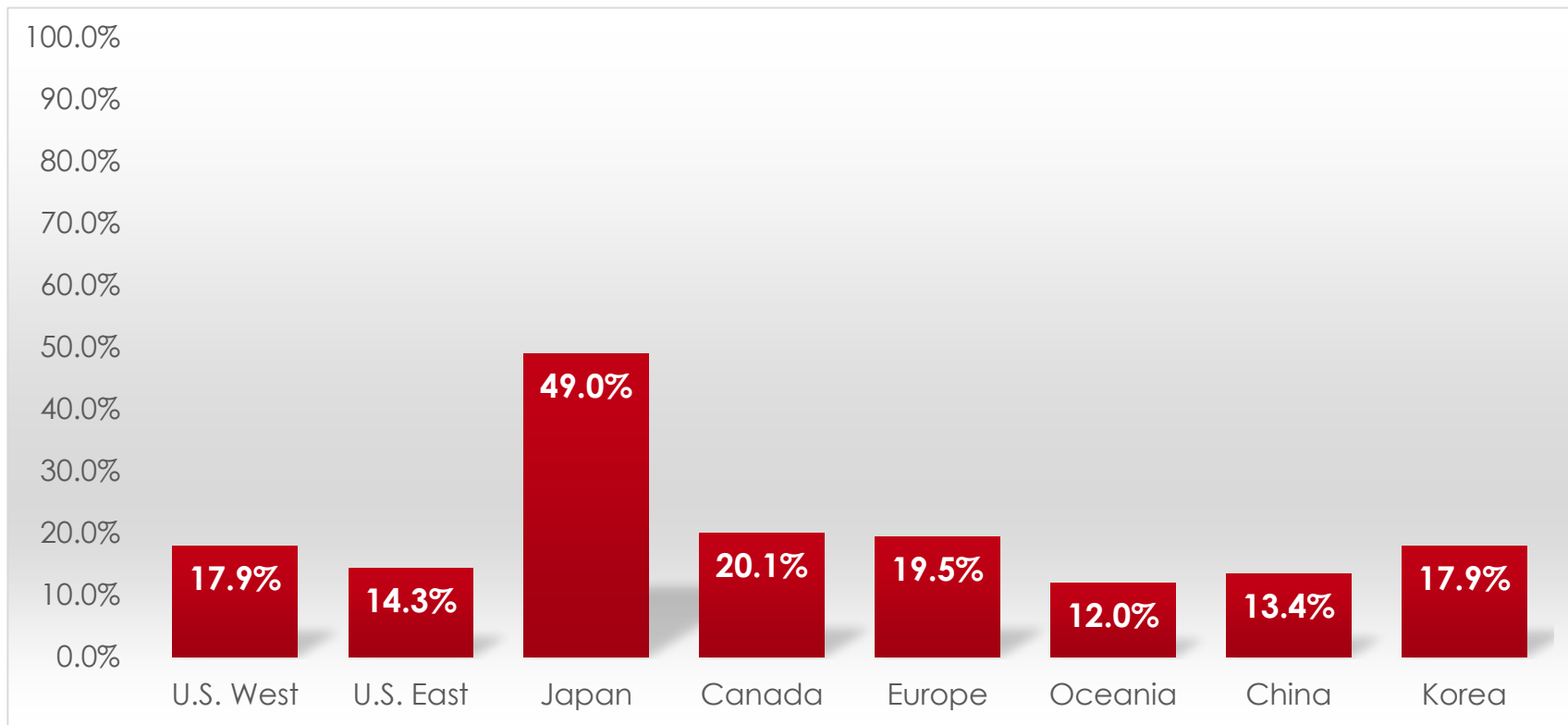
ADVERTISING AWARENESS – O‘AHU

- Younger visitors were less likely to be exposed to marketing for the island of O‘ahu in the following MMAs: U.S. West, U.S. East, and Japan.
- Visitors without a college degree who hailed from Canada and Japan were more likely to be exposed to marketing for the island of O‘ahu than were those with a college degree. The opposite is true among Korean visitors where more educated segments of the sample were more likely to be exposed to marketing for O‘ahu.
- Those who visited multiple islands during their trip were more likely to be exposed to marketing for O‘ahu.
- Male visitors from the U.S. East were more likely to be exposed to marketing for O‘ahu than were female visitors from this region.
- Repeat visitors from the following MMAs were more likely to be exposed to marketing for O‘ahu than first-time visitors: U.S. West, U.S. East, Japan, and Oceania.

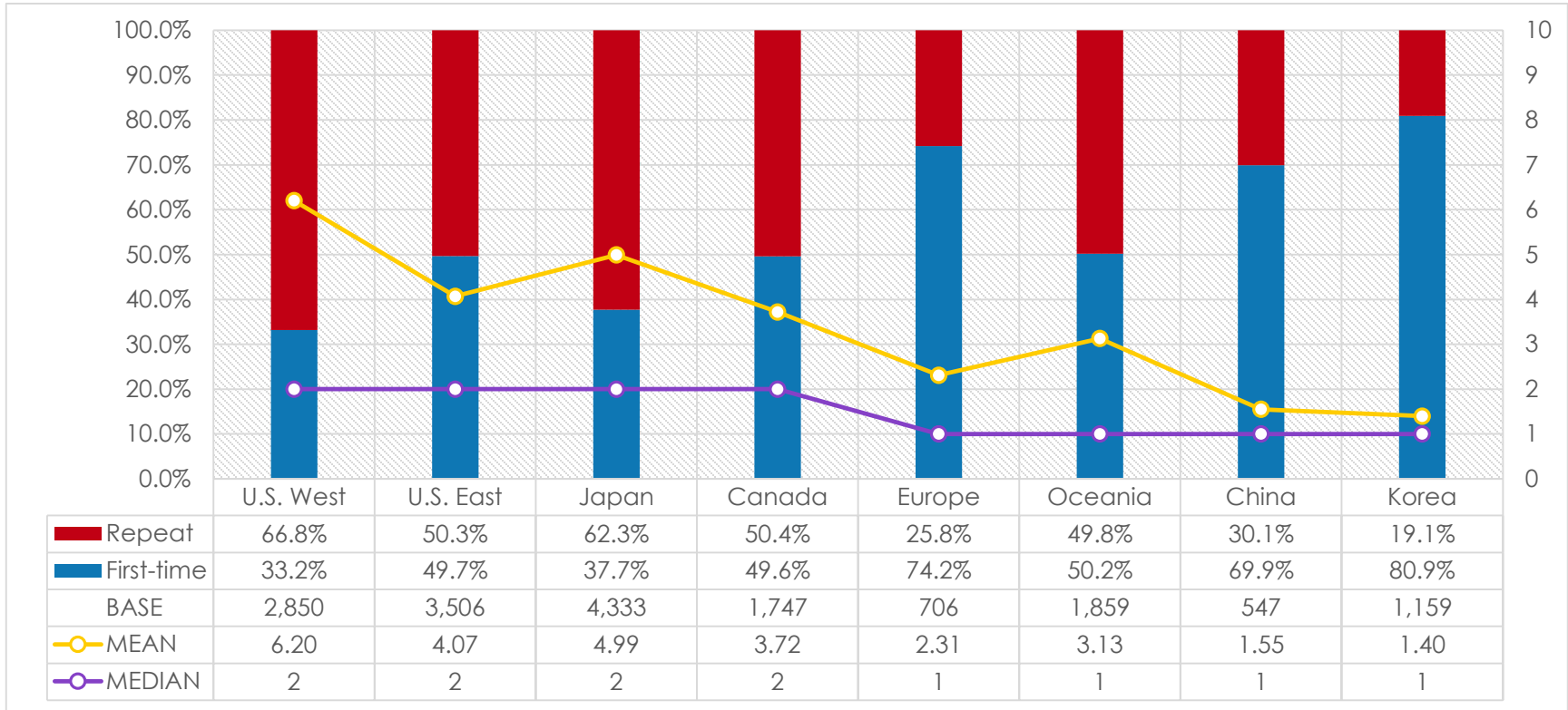
IMPACT OF LOCATION FILMING – O‘AHU



IMPACT OF HAWAIIAN MUSIC – O‘AHU



1ST TIME VS REPEAT VISITOR - O'AHU



1ST TIME VS REPEAT VISITOR - O'AHU

- Visitors from U.S. West that were more affluent visited O'ahu more frequently.
- Those who were in smaller travel parties in the following MMAs were more likely to be more frequent visitors to O'ahu: U.S. West, U.S. East, and Japan.
- Male visitors from U.S. West, U.S. East, and Canada traveled more frequently to O'ahu than their female counterparts. The opposite is true among Japanese visitors where females visited O'ahu more frequently than males.
- When we examine visitors from U.S. West we find that more educated segments visit O'ahu more frequently in the past. The opposite is true among Canadian and Japanese visitors where we find those without a college degree visiting Oahu on a more frequent basis.

ACCOMMODATIONS - O'AHU

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Hotel | 58.5% | 60.4% | 82.4% | 56.6% | 72.8% | 85.6% | 79.7% | 91.3% |
| Friends/ relative | 18.1% | 17.6% | 1.6% | 6.5% | 7.1% | 2.2% | 8.1% | 2.8% |
| Condominium | 9.6% | 7.5% | 11.3% | 18.4% | 6.5% | 7.6% | 6.2% | 1.2% |
| Timeshare unit | 9.9% | 9.7% | 7.1% | 10.6% | 2.5% | 2.7% | 1.6% | 1.0% |
| Rental house | 12.0% | 8.1% | .6% | 12.8% | 8.0% | 3.2% | 2.4% | 4.6% |
| Private room/ home | 1.9% | 2.0% | .8% | 1.9% | 2.3% | 1.3% | 2.9% | .7% |
| AirBnB/ VRBO | 1.4% | 1.5% | .1% | 2.8% | 1.7% | 1.2% | 0.0% | .1% |
| Cruise ship | .7% | 1.9% | .2% | 1.6% | 1.7% | 1.4% | .4% | 0.0% |

STRENGTHS/ POSITIVE ASPECTS - O'AHU

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Variety of activities | 19.1% | 23.2% | 19.3% | 23.4% | 19.4% | 19.7% | 19.5% | 24.8% |
| Beach/ ocean | 16.3% | 11.4% | 24.7% | 15.3% | 13.3% | 13.5% | 20.8% | 21.3% |
| Natural beauty | 12.4% | 16.6% | 19.8% | 17.7% | 19.0% | 10.1% | 25.0% | 25.4% |
| Aloha spirit | 9.9% | 8.8% | 3.1% | 9.2% | 15.7% | 10.1% | 7.9% | 2.7% |
| Customer service/ the people | 5.7% | 6.3% | 4.0% | 6.5% | 9.2% | 14.2% | 1.8% | 8.1% |
| Local culture- people, music | 8.4% | 6.0% | 3.6% | 5.8% | 5.9% | 5.9% | 3.0% | 2.3% |
| Food | 6.5% | 5.5% | 6.3% | 4.3% | 4.2% | 4.6% | 4.2% | 5.5% |
| Event- celebrate w/ friends and family | 7.0% | 5.8% | 4.3% | 3.6% | 2.7% | 2.3% | 1.1% | 1.1% |

STRENGTHS/ POSITIVE ASPECTS - O'AHU

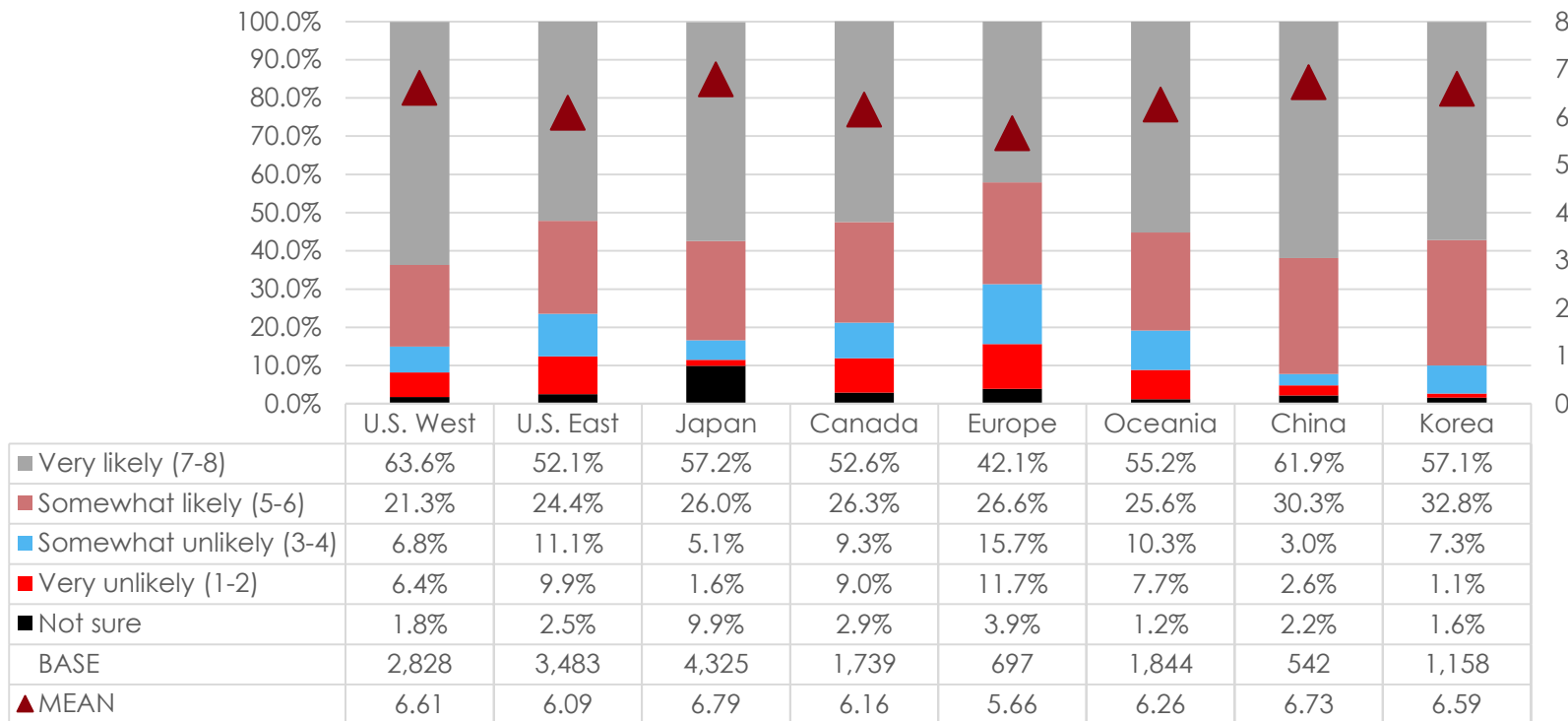
- Visitors from Asia tended to focus more on facets like beaches and O'ahu's natural beauty while those from the U.S, Canada, Oceania, and Europe were more likely to single out visitor experience aspects like hospitality and the Aloha spirit.
- Among Japanese visitors younger segments of the sample were more likely to mention the variety of activities and the beach when asked to identify positive aspects of their trip.
- Younger visitors from U.S. West and U.S. East were also more likely to mention the beach and ocean when asked for facets of their trip that made their stay on O'ahu more enjoyable
- Male visitors from U.S. West, U.S. East, and Japan were more likely to single out the food as a positive aspect of their trip than were females from these MMAs.

AREAS OF OPPORTUNITIES - O'AHU

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Nothing | 31.4% | 32.8% | 33.3% | 34.5% | 40.7% | 46.0% | 44.0% | 29.0% |
| Traffic | 22.0% | 21.8% | 5.8% | 14.8% | 8.7% | 5.8% | 4.6% | 6.1% |
| Driving experience | 8.7% | 7.7% | 5.5% | 6.7% | 3.4% | 2.9% | 3.3% | 6.5% |
| Not enough local culture | 6.1% | 7.3% | 6.1% | 8.4% | 8.9% | 6.6% | 9.8% | 8.0% |
| Safety | 4.1% | 3.7% | 6.8% | 4.0% | 3.9% | 2.4% | 2.6% | 4.8% |
| Ground transportation | 1.7% | 2.1% | 7.4% | 1.5% | 2.5% | 2.6% | 7.0% | 4.5% |
| Food – quality | 1.7% | 1.1% | 6.3% | 1.2% | 2.1% | 2.4% | 3.1% | 7.2% |
| Food - variety | 2.3% | 1.9% | 3.1% | 3.7% | 4.8% | 5.0% | 5.0% | 7.7% |

LIKELIHOOD OF RETURN VISIT – O‘AHU

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



LIKELIHOOD OF RETURN VISIT – O‘AHU

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

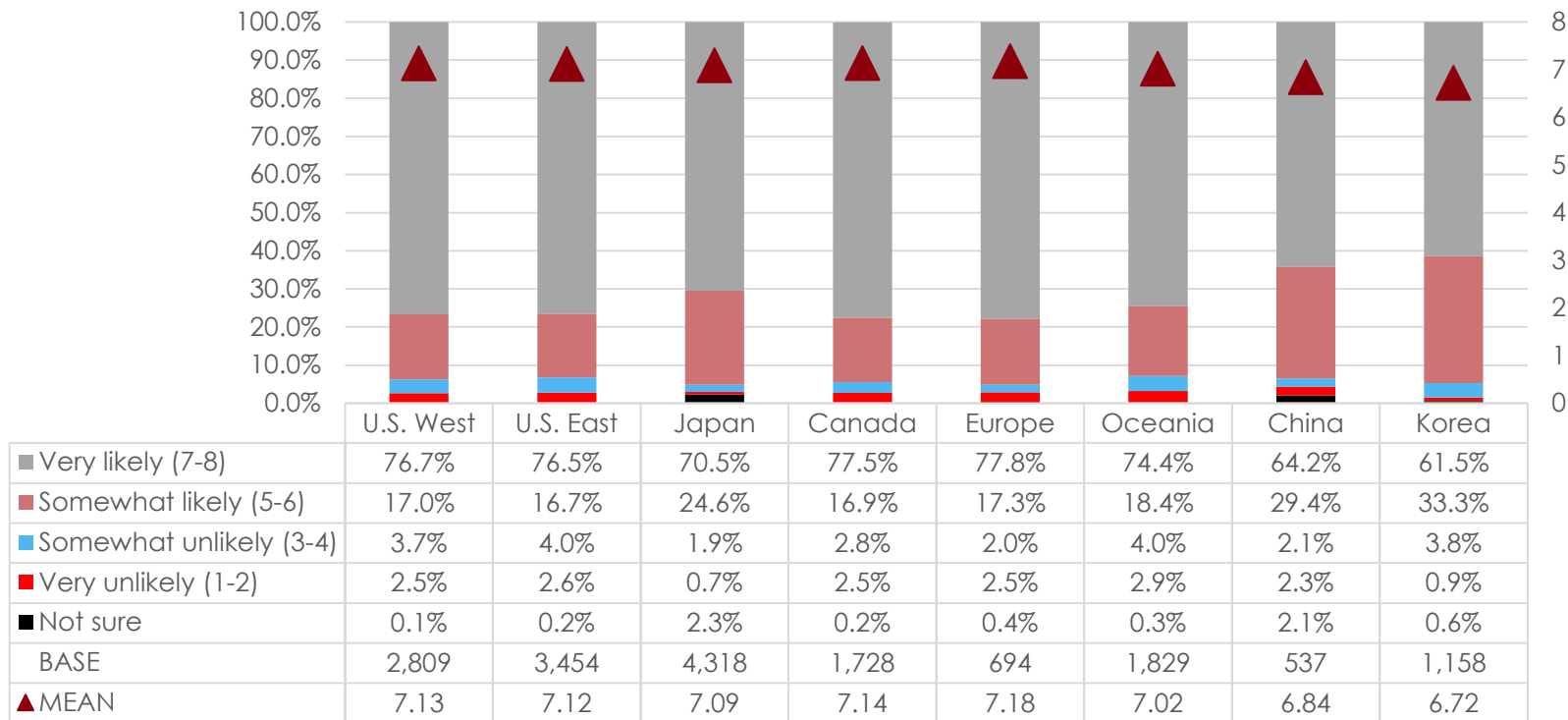
- Those who traveled to Hawai‘i on their own were the most likely to indicate a return in the next five years is likely from the following MMAs: U.S. West, U.S. East, and Japan.
- Those who visited just O‘ahu on their trip were more likely than those who also visited a Neighbor Island to return to O‘ahu in the next five years among the following MMAs: U.S. West, U.S. East, Canada, and Oceania.
- When segmented by gender we find Japanese females more likely to return to O‘ahu in the next five years compared to males. This was also true among female visitors from Oceania.
- When segmented by age we find younger visitors from U.S. West and U.S. East more likely to return to O‘ahu than older visitors from these MMAs. The opposite is true among Japanese visitors where younger travelers are less likely to return in five years.

REASONS FOR NOT RETURNING - O'AHU

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Want to visit someplace new | 38.8% | 39.4% | 24.5% | 44.8% | 38.7% | 44.6% | 27.6% | 29.4% |
| Cost/ expensive | 28.8% | 36.5% | 34.2% | 39.6% | 43.1% | 33.8% | 40.0% | 43.1% |
| Flight is too long | 9.5% | 27.5% | 26.1% | 21.3% | 51.5% | 12.5% | 34.9% | 27.7% |
| Too commercialized/ overdeveloped | 31.2% | 24.1% | 4.8% | 28.5% | 19.0% | 25.2% | 15.2% | 11.2% |
| Too crowded/ congested | 32.6% | 26.5% | 4.8% | 25.0% | 9.7% | 15.4% | 7.6% | 12.1% |
| Other financial obligations | 8.9% | 11.1% | 26.0% | 8.3% | 9.3% | 8.8% | 0.0% | 18.1% |
| Not enough value | 12.9% | 14.1% | 6.2% | 13.8% | 11.2% | 20.0% | 22.7% | 26.8% |
| No compelling reason to return/ nothing new | 11.7% | 12.3% | 10.7% | 10.5% | 8.4% | 14.1% | 20.1% | 23.3% |

O'AHU - BRAND/DESTINATION – ADVOCACY

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



O'AHU - BRAND/DESTINATION – ADVOCACY

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Brand advocacy for O'ahu is lower among visitors from China and Korea compared to other MMAs.
- Among U.S. visitors, brand advocacy is higher among younger, less affluent, and less educated segments of the sample.
- When segmented by gender we find brand advocacy for O'ahu is stronger among females than it is for males in the following MMAs: U.S. West, U.S. East, Japan, and Oceania.
- Repeat visitors from Japan and Oceania were more likely to recommend O'ahu to friends and family than were first-time visitors from these MMAs.

O'AHU ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 93.8% | 95.0% | 95.1% | 94.7% | 93.5% | 90.9% | 95.3% | 94.8% |
| On own (self-guided) | 78.7% | 75.3% | 67.5% | 75.4% | 59.4% | 44.0% | 56.3% | 75.5% |
| Helicopter/ airplane | 2.4% | 3.6% | 1.6% | 2.2% | 4.6% | 5.1% | 8.0% | 3.1% |
| Boat/ submarine/ whale | 14.7% | 17.1% | 10.1% | 14.9% | 14.9% | 15.4% | 25.6% | 14.7% |
| Visit towns | 43.4% | 46.2% | 30.8% | 45.5% | 35.1% | 25.9% | 27.2% | 38.0% |
| Limo/ van/ bus tour | 11.1% | 18.0% | 17.7% | 16.8% | 28.2% | 37.1% | 17.9% | 15.7% |
| Scenic views/ natural landmark | 54.6% | 63.3% | 20.3% | 62.6% | 55.7% | 48.6% | 64.4% | 55.2% |
| Movie/ TV/ film location | 7.9% | 10.7% | 4.4% | 10.7% | 13.2% | 9.8% | 13.7% | 14.0% |

O'AHU ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 93.9% | 93.3% | 95.6% | 96.5% | 95.5% | 93.5% | 92.5% | 98.7% |
| Beach/ sunbathing | 81.9% | 81.4% | 75.6% | 87.8% | 86.1% | 79.9% | 74.7% | 82.5% |
| Bodyboard/ Standup paddle board | 15.3% | 10.4% | 3.5% | 13.0% | 10.6% | 10.2% | 3.2% | 6.4% |
| Surfing | 7.9% | 7.2% | 4.1% | 9.7% | 13.4% | 10.0% | 7.7% | 11.0% |
| Canoeing/ kayak | 6.2% | 5.1% | 1.9% | 4.5% | 4.9% | 3.7% | 3.5% | 5.3% |
| Swim- ocean | 61.6% | 59.8% | 39.9% | 71.5% | 65.1% | 65.5% | 38.1% | 51.9% |
| Snorkel | 35.8% | 29.1% | 15.5% | 38.2% | 30.2% | 24.2% | 17.1% | 46.0% |
| Windsurf/ Kitesurf | 0.2% | 0.3% | 0.2% | 0.4% | 0.1% | 0.1% | 1.5% | 1.6% |
| Jet ski/ Parasail | 2.4% | 1.9% | 3.5% | 2.3% | 1.0% | 1.4% | 0.9% | 6.8% |
| Scuba | 2.0% | 2.1% | 2.1% | 1.8% | 1.9% | 0.7% | 3.2% | 4.4% |
| Fishing | 2.4% | 2.1% | 1.5% | 1.4% | 1.1% | 0.9% | 3.9% | 2.0% |
| Golf | 4.8% | 3.4% | 5.4% | 3.2% | 1.4% | 2.3% | 4.8% | 4.2% |

O'AHU ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 93.9% | 93.3% | 95.6% | 96.5% | 95.5% | 93.5% | 92.5% | 98.7% |
| Run/ Jog/ Fitness walk | 28.4% | 26.0% | 14.7% | 29.2% | 19.0% | 23.0% | 21.8% | 9.4% |
| Spa | 7.8% | 7.1% | 6.6% | 5.1% | 5.0% | 7.2% | 4.9% | 5.7% |
| Hiking/Backpack/Camp | 31.6% | 34.6% | 7.9% | 34.9% | 20.9% | 9.8% | 11.3% | 12.4% |
| Agritourism | 12.3% | 14.9% | 9.1% | 12.8% | 11.3% | 7.7% | 16.0% | 20.3% |
| Sport event/ tournament | 4.0% | 2.9% | 1.5% | 3.6% | 1.8% | 2.2% | 1.7% | 1.7% |
| Park/ botanical garden | 33.2% | 39.9% | 22.8% | 39.0% | 36.1% | 30.0% | 35.3% | 25.9% |
| Waterpark | 2.7% | 1.6% | 3.6% | 2.1% | 3.6% | 2.0% | 13.7% | 3.5% |
| Mountain tube/ waterfall rappel | 0.6% | 0.6% | 0.4% | 0.7% | 2.8% | 0.3% | 0.9% | 0.3% |
| Zip-lining | 4.2% | 2.6% | 0.6% | 2.2% | 1.4% | 1.3% | 1.3% | 1.6% |
| Skydiving | 0.8% | 0.8% | 1.0% | 0.8% | 1.0% | 0.1% | 10.7% | 4.3% |
| All terrain vehicle (ATV) | 2.5% | 2.9% | 1.2% | 2.5% | 1.5% | 3.0% | 6.2% | 7.7% |
| Horseback riding | 1.7% | 2.1% | 4.8% | 1.7% | 1.6% | 1.4% | 12.1% | 4.5% |

O'AHU ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 98.1% | 98.7% | 98.4% | 99.2% | 98.1% | 98.7% | 96.2% | 98.9% |
| Lunch/ sunset/ dinner/ evening cruise | 20.0% | 21.7% | 17.0% | 19.2% | 26.3% | 20.1% | 57.7% | 37.3% |
| Live music/ stage show | 31.5% | 34.4% | 19.6% | 34.2% | 30.2% | 24.2% | 14.9% | 15.5% |
| Nightclub/ dancing/ bar/ karaoke | 11.5% | 11.7% | 7.2% | 11.0% | 11.4% | 9.7% | 10.5% | 11.0% |
| Fine dining | 46.8% | 50.6% | 48.0% | 43.5% | 38.7% | 37.8% | 51.4% | 60.4% |
| Family restaurant | 59.0% | 55.7% | 23.0% | 65.4% | 49.1% | 70.4% | 17.7% | 38.9% |
| Fast food | 43.6% | 41.9% | 55.1% | 58.9% | 54.5% | 53.0% | 42.4% | 53.2% |
| Food truck | 39.4% | 36.7% | 16.5% | 43.8% | 28.1% | 24.4% | 17.8% | 53.2% |
| Café/ coffee house | 41.2% | 40.8% | 55.4% | 48.7% | 52.8% | 58.9% | 37.8% | 58.9% |
| Ethnic dining | 34.6% | 36.7% | 10.4% | 28.7% | 18.6% | 14.7% | 17.7% | 24.0% |
| Prepared own meal | 37.6% | 31.9% | 14.5% | 48.5% | 25.3% | 21.5% | 15.2% | 10.6% |

O'AHU ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 95.1% | 95.5% | 97.9% | 97.5% | 95.8% | 97.8% | 95.1% | 97.8% |
| Mall/ department store | 51.0% | 52.4% | 85.0% | 70.4% | 71.9% | 83.3% | 73.9% | 85.3% |
| Designer boutique | 15.5% | 17.0% | 29.8% | 20.9% | 20.0% | 24.7% | 9.6% | 5.2% |
| Hotel/ resort store | 37.1% | 41.2% | 36.5% | 33.0% | 34.1% | 36.3% | 24.0% | 32.8% |
| Swap meet/ flea market | 21.4% | 18.3% | 3.7% | 17.0% | 7.6% | 9.7% | 4.8% | 3.5% |
| Discount/ outlet store | 16.0% | 18.0% | 27.7% | 23.5% | 24.4% | 52.8% | 42.3% | 66.2% |
| Supermarket | 52.8% | 45.8% | 63.7% | 59.5% | 60.8% | 51.9% | 60.3% | 60.1% |
| Farmer's market | 22.1% | 18.7% | 17.1% | 27.7% | 19.2% | 15.3% | 9.0% | 10.2% |
| Convenience store | 50.5% | 54.0% | 51.4% | 62.2% | 45.6% | 69.2% | 44.2% | 47.7% |
| Duty free store | 5.8% | 6.5% | 50.1% | 12.1% | 10.4% | 13.3% | 56.9% | 52.8% |
| Local shop/ artisan | 52.6% | 55.6% | 9.2% | 55.1% | 51.8% | 48.4% | 24.6% | 14.7% |

O'AHU ACTIVITIES – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 75.7% | 81.1% | 53.3% | 77.4% | 80.6% | 74.3% | 81.2% | 67.5% |
| Historic military site | 45.0% | 55.4% | 18.5% | 41.8% | 58.1% | 50.5% | 59.1% | 21.9% |
| Other historical site | 24.3% | 27.2% | 14.9% | 25.1% | 26.0% | 18.9% | 24.2% | 27.5% |
| Museum/ art gallery | 16.7% | 16.5% | 6.9% | 17.1% | 13.4% | 12.9% | 15.2% | 7.5% |
| Luau/ Polynesian show/ hula show | 34.8% | 39.2% | 12.2% | 37.3% | 33.4% | 30.4% | 12.5% | 22.8% |
| Lesson- ex. ukulele, hula, canoe, lei making | 8.6% | 8.8% | 6.2% | 9.9% | 10.2% | 6.3% | 10.0% | 5.5% |
| Play/ concert/ theatre | 6.1% | 5.8% | 3.3% | 6.5% | 6.0% | 4.2% | 4.1% | 5.0% |
| Art/ craft fair | 6.8% | 8.0% | 3.2% | 7.4% | 5.7% | 4.6% | 8.4% | 5.6% |
| Festival event | 5.3% | 5.2% | 2.8% | 7.4% | 4.3% | 4.2% | 1.3% | 3.0% |

O‘AHU ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 90.9% | 90.1% | 95.7% | 96.5% | 95.4% | 97.6% | 93.1% | 94.8% |
| Airport shuttle | 21.3% | 23.2% | 25.1% | 31.7% | 31.8% | 56.9% | 17.1% | 17.5% |
| Trolley | 3.3% | 4.4% | 54.3% | 8.1% | 10.8% | 24.7% | 9.4% | 27.4% |
| Public bus | 9.7% | 10.0% | 20.2% | 26.3% | 29.5% | 33.0% | 23.3% | 14.7% |
| Tour bus/ tour van | 12.7% | 19.2% | 25.3% | 19.3% | 26.8% | 36.7% | 26.4% | 32.6% |
| Taxi/ limo | 11.4% | 16.9% | 33.5% | 28.0% | 35.5% | 41.5% | 25.5% | 23.6% |
| Rental car | 63.5% | 58.0% | 27.0% | 60.3% | 40.7% | 24.1% | 45.6% | 59.3% |
| Ride share | 21.4% | 23.5% | 3.5% | 17.0% | 15.8% | 22.0% | 16.0% | 8.6% |
| Bicycle rental | 2.5% | 1.5% | 3.4% | 2.5% | 2.8% | 1.5% | 3.4% | 1.5% |

O'AHU ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 40.4% | 34.6% | 11.9% | 18.7% | 16.3% | 8.1% | 19.9% | 15.3% |
| Visit friends/ family | 39.7% | 34.0% | 11.2% | 18.1% | 14.3% | 7.5% | 18.1% | 14.1% |
| Volunteer- non-profit | 1.3% | 1.0% | 0.8% | 0.6% | 2.1% | 0.7% | 2.4% | 1.2% |

ATTRACTIONS – O‘AHU

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Atlantis Submarine & Cruises | 3.1% | 4.2% | 6.7% | 4.8% | 4.6% | 4.0% | 27.2% | 12.8% |
| Bernice P. Bishop Museum | 5.0% | 4.5% | 1.8% | 5.0% | 3.4% | 2.6% | 5.4% | 2.4% |
| Byodo-In Temple | 9.6% | 10.0% | 0.9% | 10.5% | 9.9% | 6.4% | 4.9% | 1.0% |
| Diamond Head State Monument | 29.9% | 41.3% | 20.9% | 47.4% | 46.3% | 39.7% | 29.8% | 40.5% |
| Dole Plantation | 34.6% | 38.4% | 11.4% | 42.0% | 31.8% | 27.0% | 35.7% | 45.6% |
| Haleiwa | 28.2% | 26.2% | 20.6% | 28.5% | 23.9% | 12.5% | 16.3% | 22.1% |
| Hanauma Bay Nature Reserve | 23.3% | 24.3% | 20.4% | 33.9% | 28.9% | 18.9% | 48.4% | 47.3% |
| Harold L. Lyon Arboretum | 0.9% | 1.4% | 2.6% | 1.7% | 0.9% | 0.3% | 2.8% | 9.5% |
| Hawaii State Art Museum or Honolulu Museum of Art | 2.8% | 2.8% | 4.0% | 3.7% | 3.3% | 2.5% | 3.9% | 5.9% |
| Hawaii's Plantation Village | 2.4% | 2.3% | 1.8% | 2.7% | 2.3% | 2.9% | 9.2% | 5.8% |

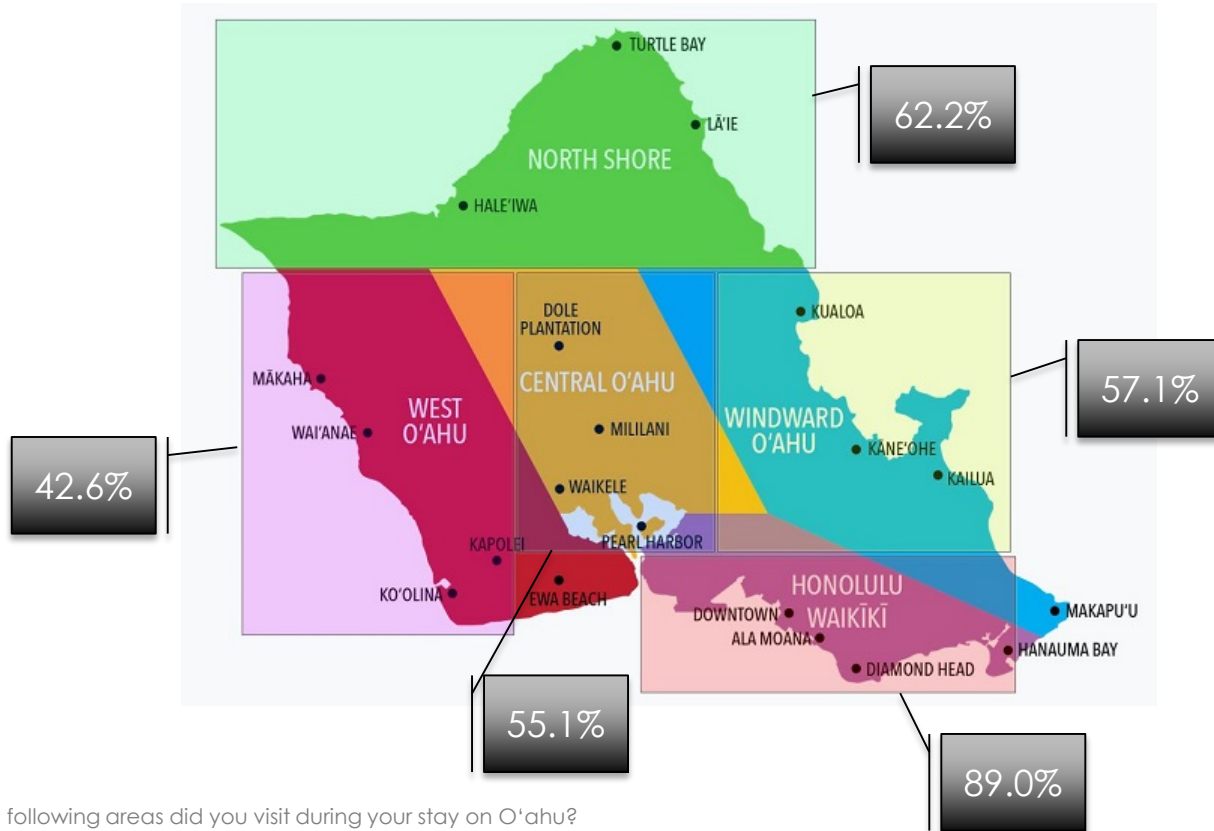
ATTRACTIONS – O‘AHU (cont.)

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Ho'omaluhia Botanical Garden | 3.9% | 4.5% | 6.6% | 4.8% | 6.4% | 3.8% | 3.9% | 5.2% |
| Iolani Palace State Monument | 7.7% | 11.1% | 15.7% | 10.2% | 16.1% | 9.8% | 19.6% | 25.4% |
| Kaiwi State Scenic Shoreline/ Makapuu Trail | 7.6% | 12.2% | 6.8% | 10.6% | 6.1% | 3.7% | 8.7% | 8.5% |
| Kualoa Private Nature Reserve | 10.1% | 11.6% | 6.6% | 13.2% | 13.1% | 10.4% | 19.6% | 12.0% |
| Lanikai or Kailua Beach | 27.4% | 29.9% | 18.3% | 34.9% | 31.9% | 14.7% | 15.0% | 23.5% |
| Manoa Falls & Trail | 12.7% | 15.2% | 3.0% | 16.7% | 17.5% | 6.4% | 9.9% | 3.6% |
| National Memorial Cemetery of the Pacific | 11.6% | 16.6% | 3.0% | 10.5% | 21.3% | 16.3% | 14.6% | 4.5% |
| Nuuanu Pali Lookout | 17.2% | 20.6% | 8.0% | 22.0% | 19.3% | 12.1% | 33.6% | 15.2% |

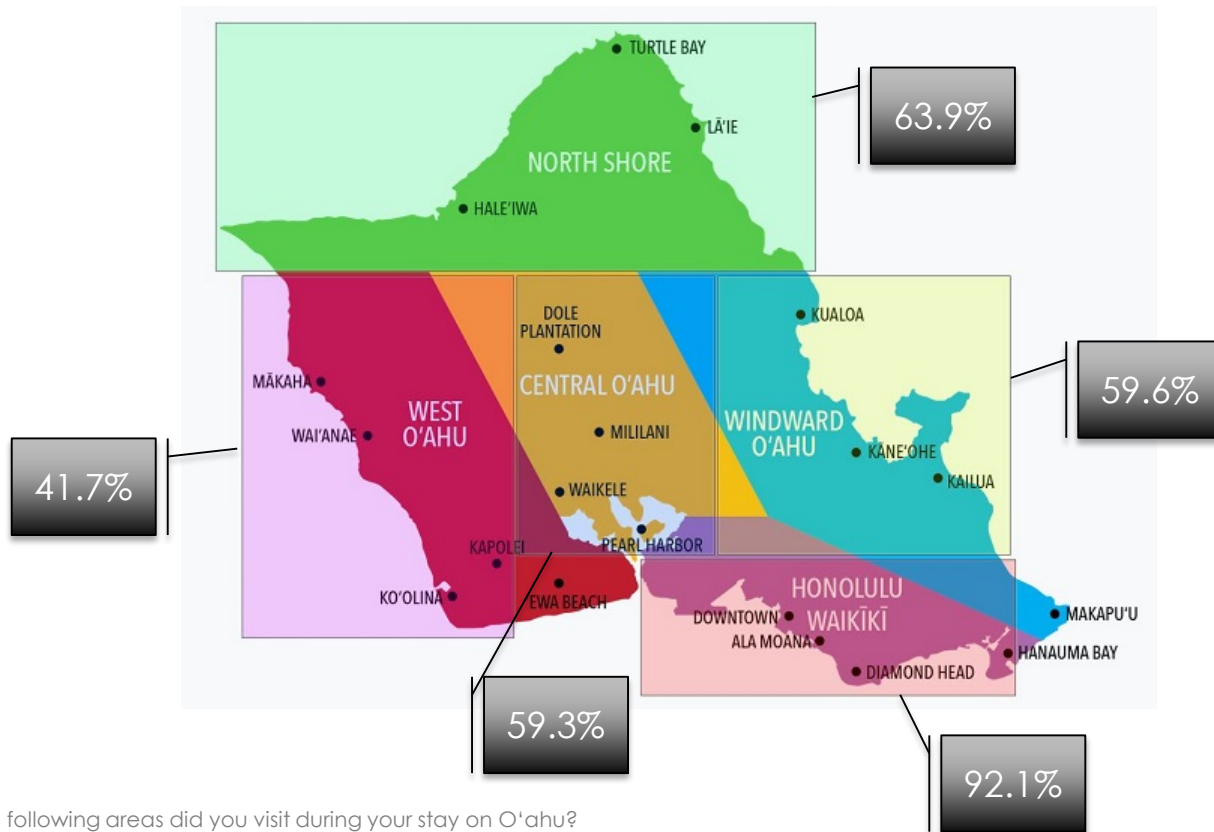
ATTRACTIONS – O‘AHU (cont.)

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-----------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Pearl Harbor | 38.9% | 52.6% | 14.0% | 39.7% | 56.6% | 46.9% | 60.0% | 25.3% |
| Polynesian Cultural Center | 22.5% | 21.0% | 4.8% | 24.8% | 18.3% | 13.2% | 32.1% | 22.0% |
| Sea Life Park Hawaii | 4.5% | 4.7% | 4.7% | 6.4% | 4.8% | 3.4% | 13.5% | 8.7% |
| Waikiki Aquarium | 6.2% | 6.7% | 7.3% | 9.2% | 6.0% | 6.3% | 11.4% | 4.1% |
| Waimanalo Beach Park | 13.9% | 14.3% | 4.2% | 18.1% | 19.4% | 8.4% | 9.6% | 9.5% |
| Waimea Bay | 27.7% | 27.6% | 3.3% | 31.5% | 29.7% | 25.7% | 8.6% | 11.2% |
| Waimea Valley | 16.0% | 17.8% | 3.6% | 18.6% | 20.4% | 10.7% | 3.9% | 5.7% |

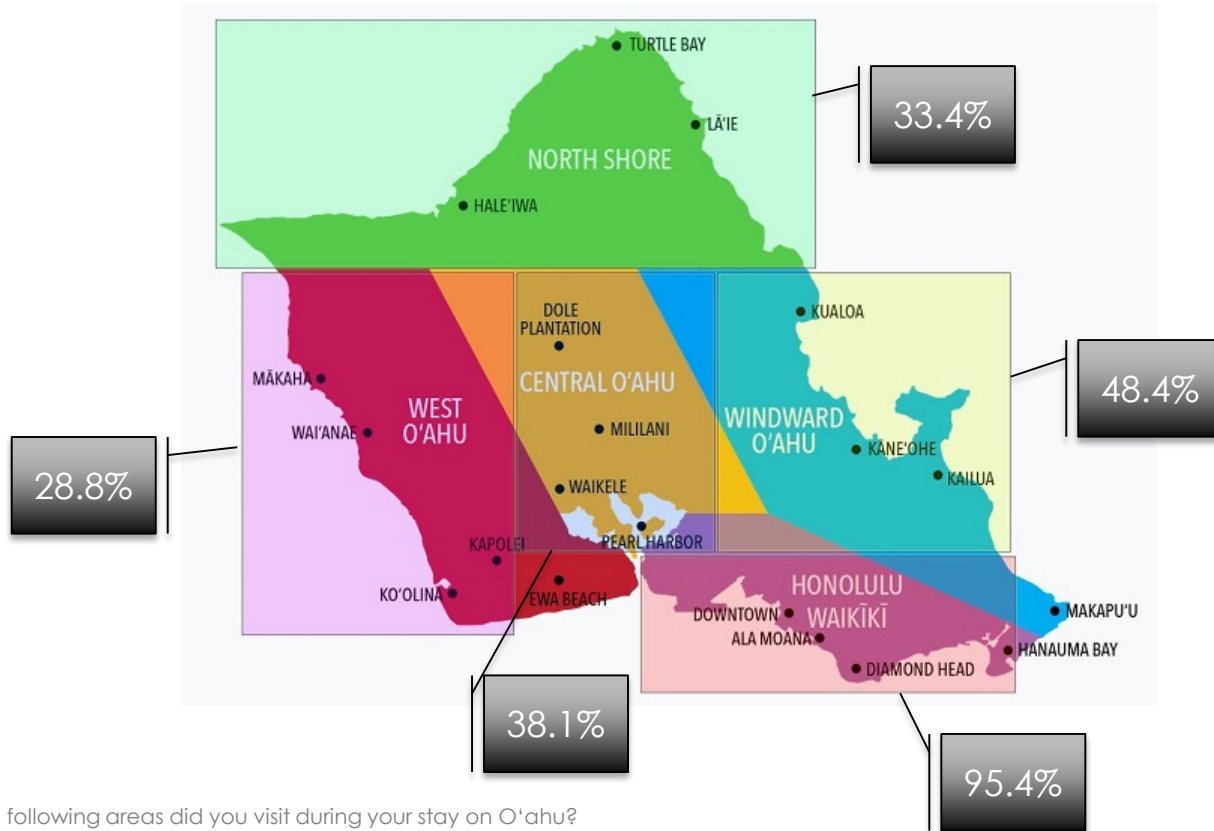
AREAS VISITED U.S. WEST



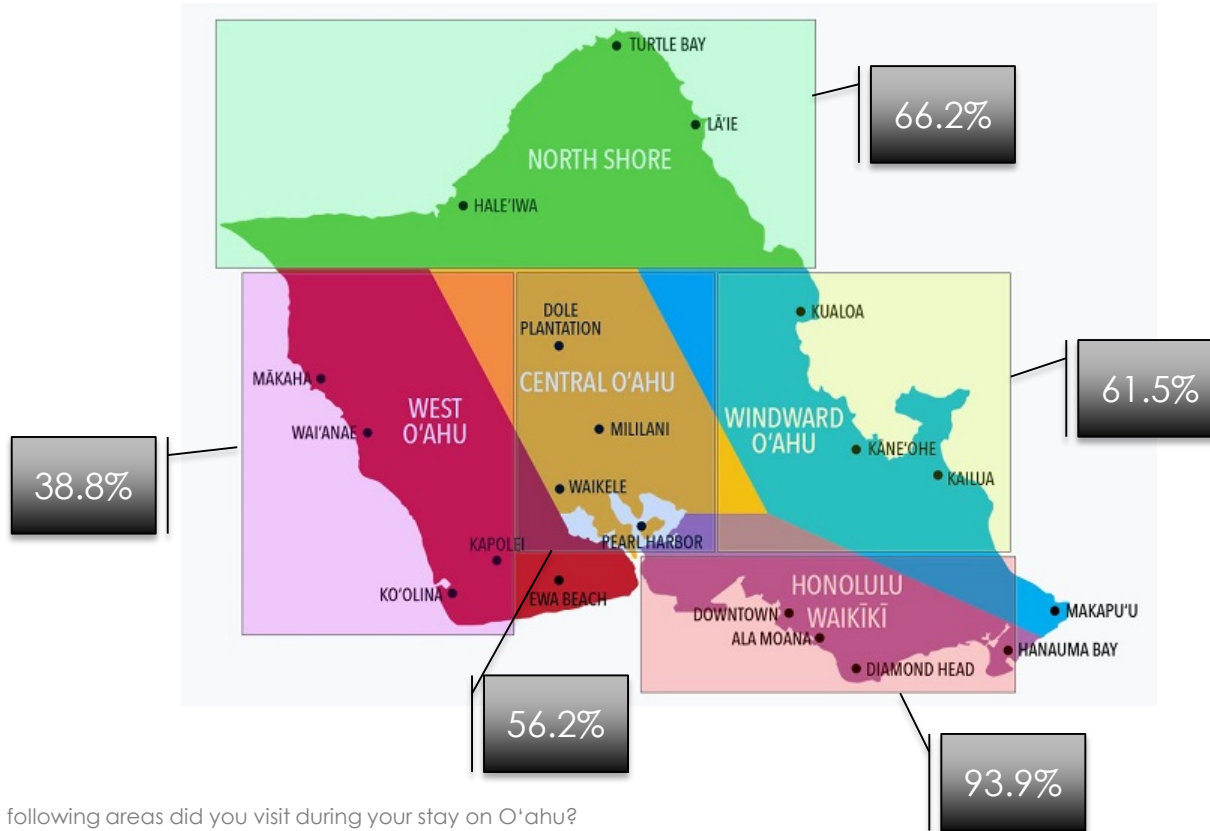
AREAS VISITED U.S. EAST



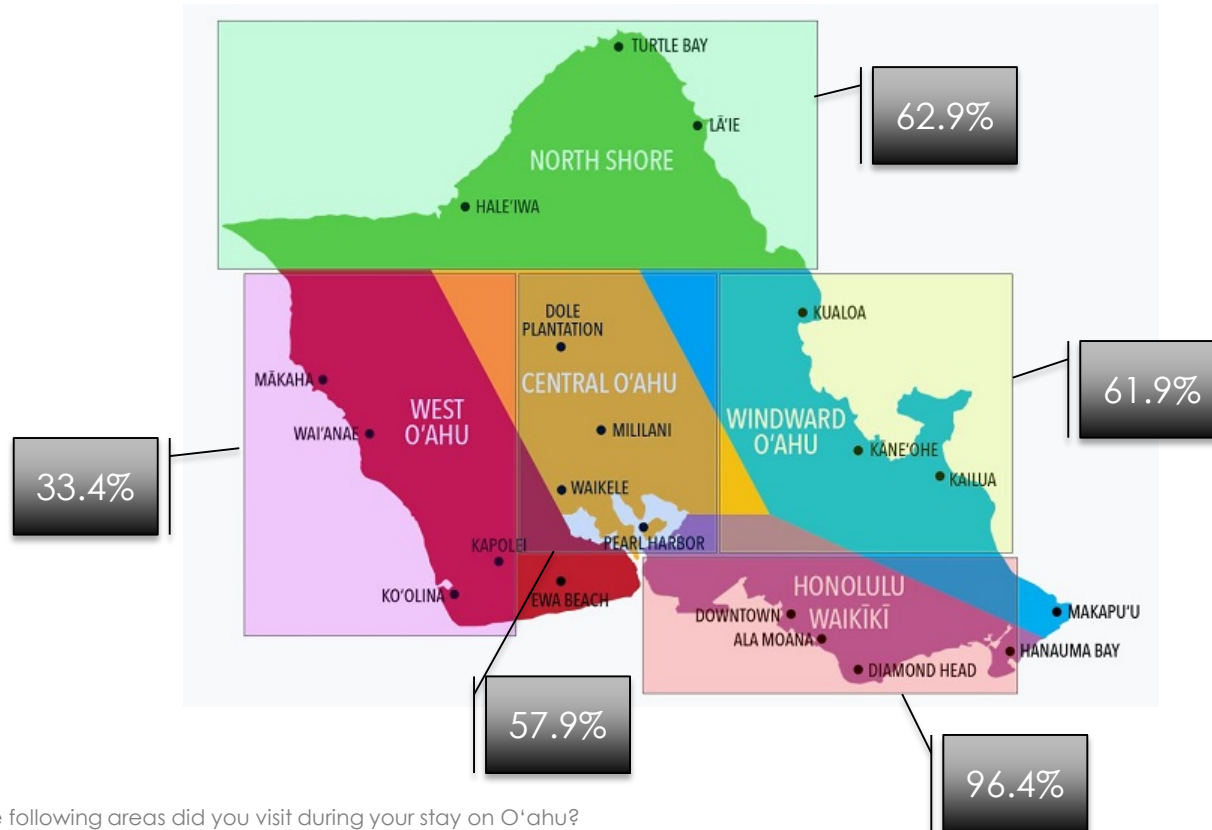
AREAS VISITED JAPAN



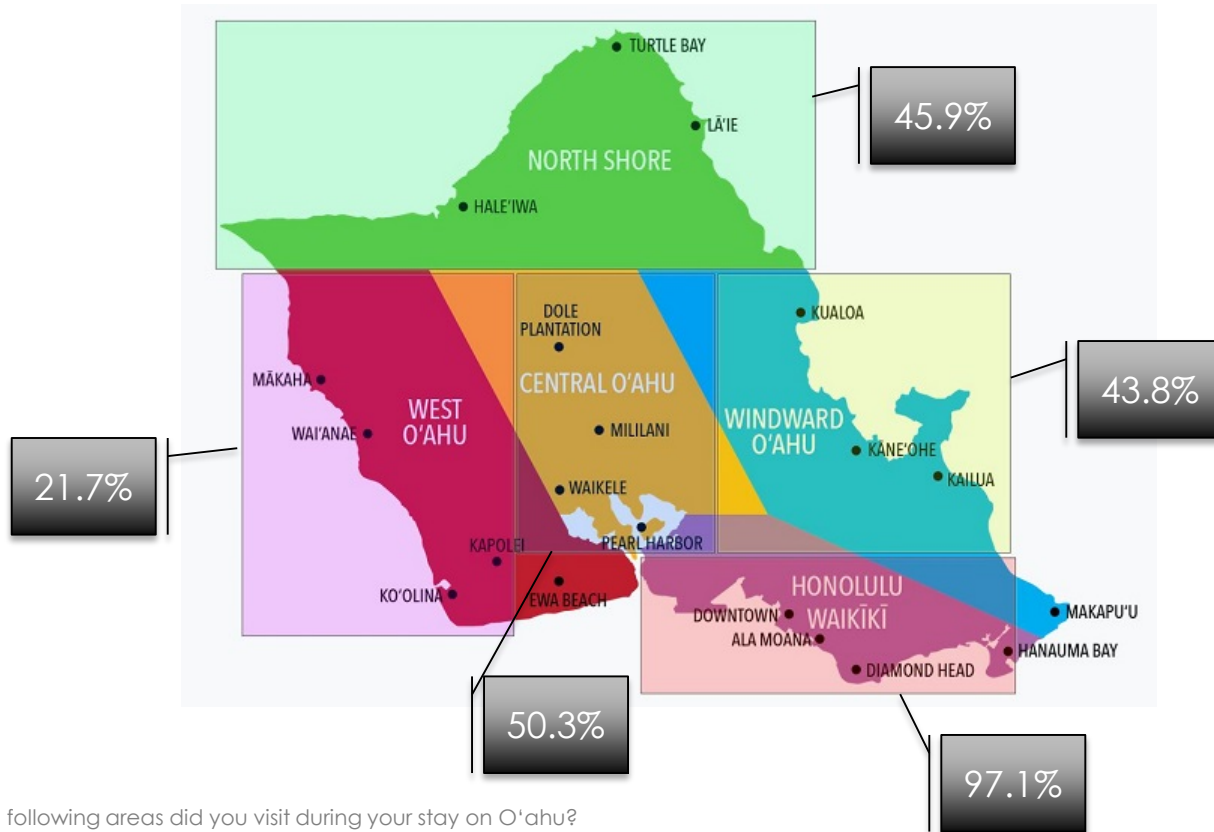
AREAS VISITED CANADA



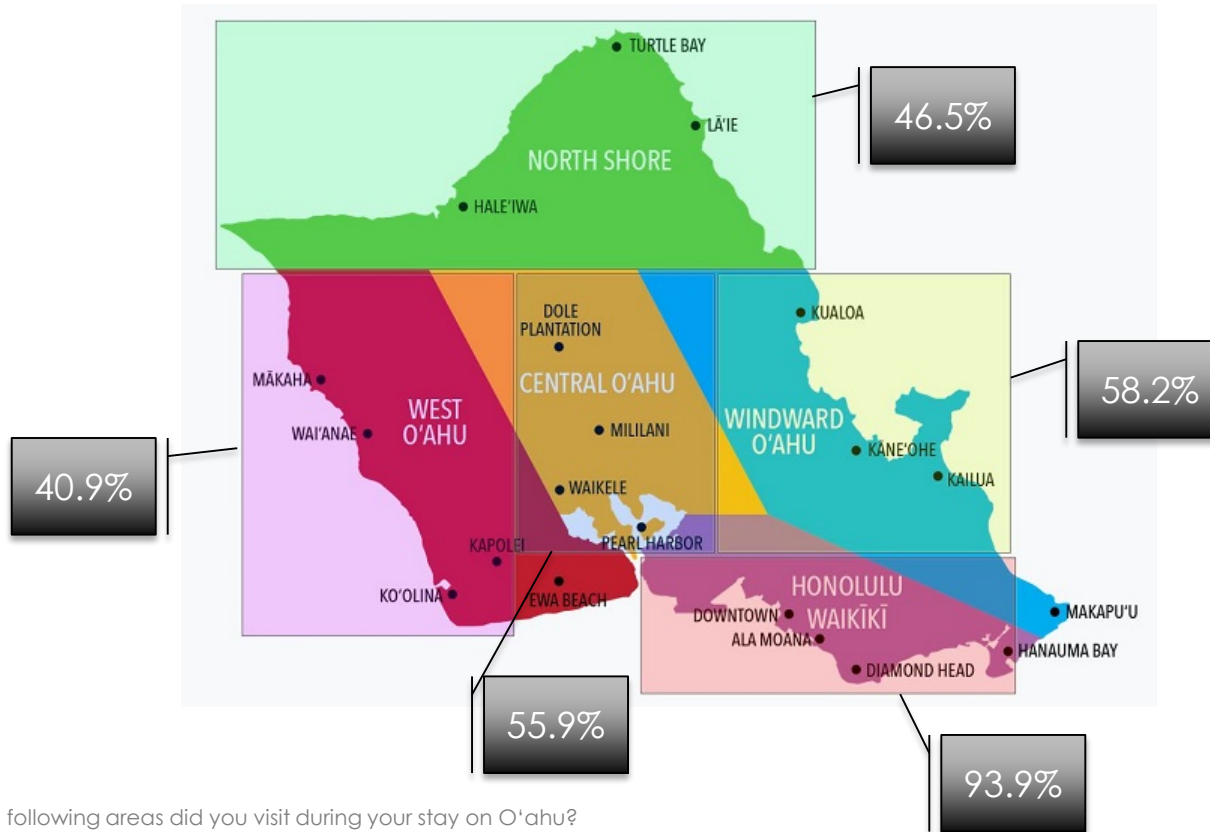
AREAS VISITED EUROPE



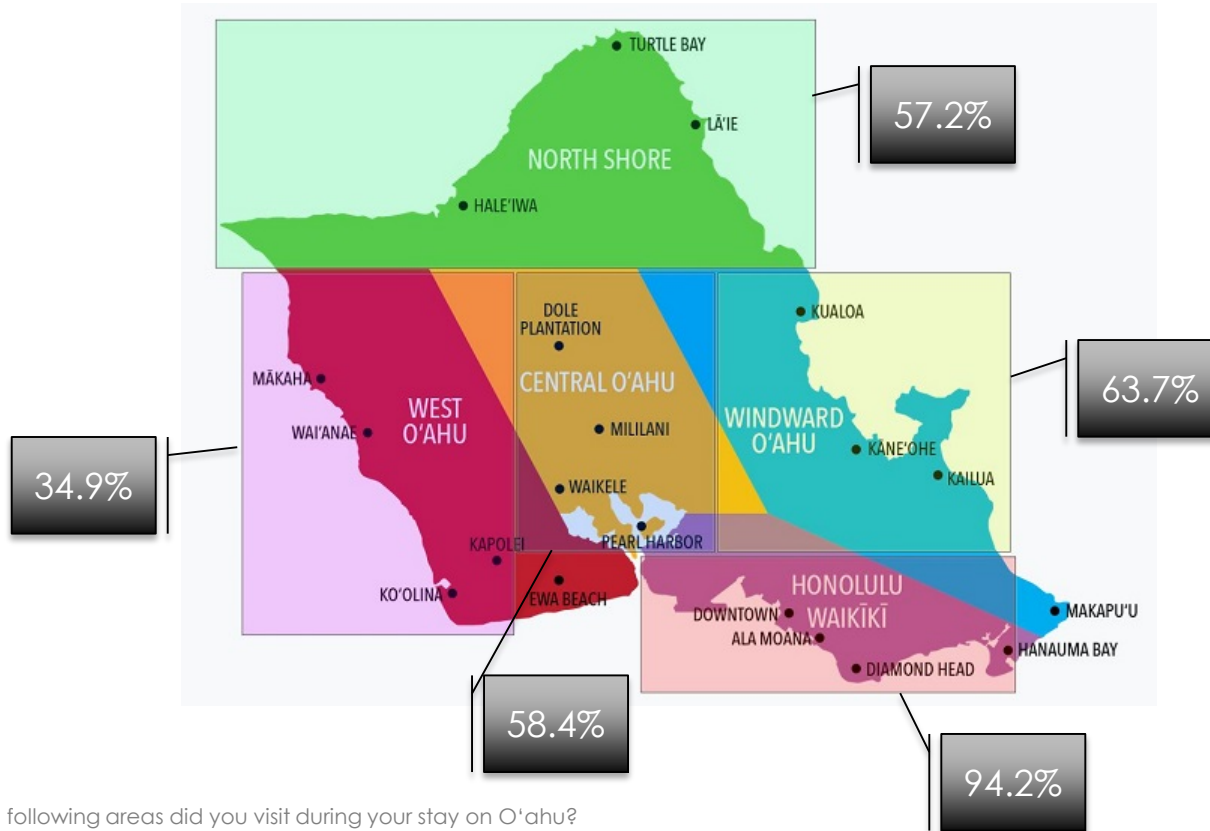
AREAS VISITED OCEANIA



AREAS VISITED CHINA

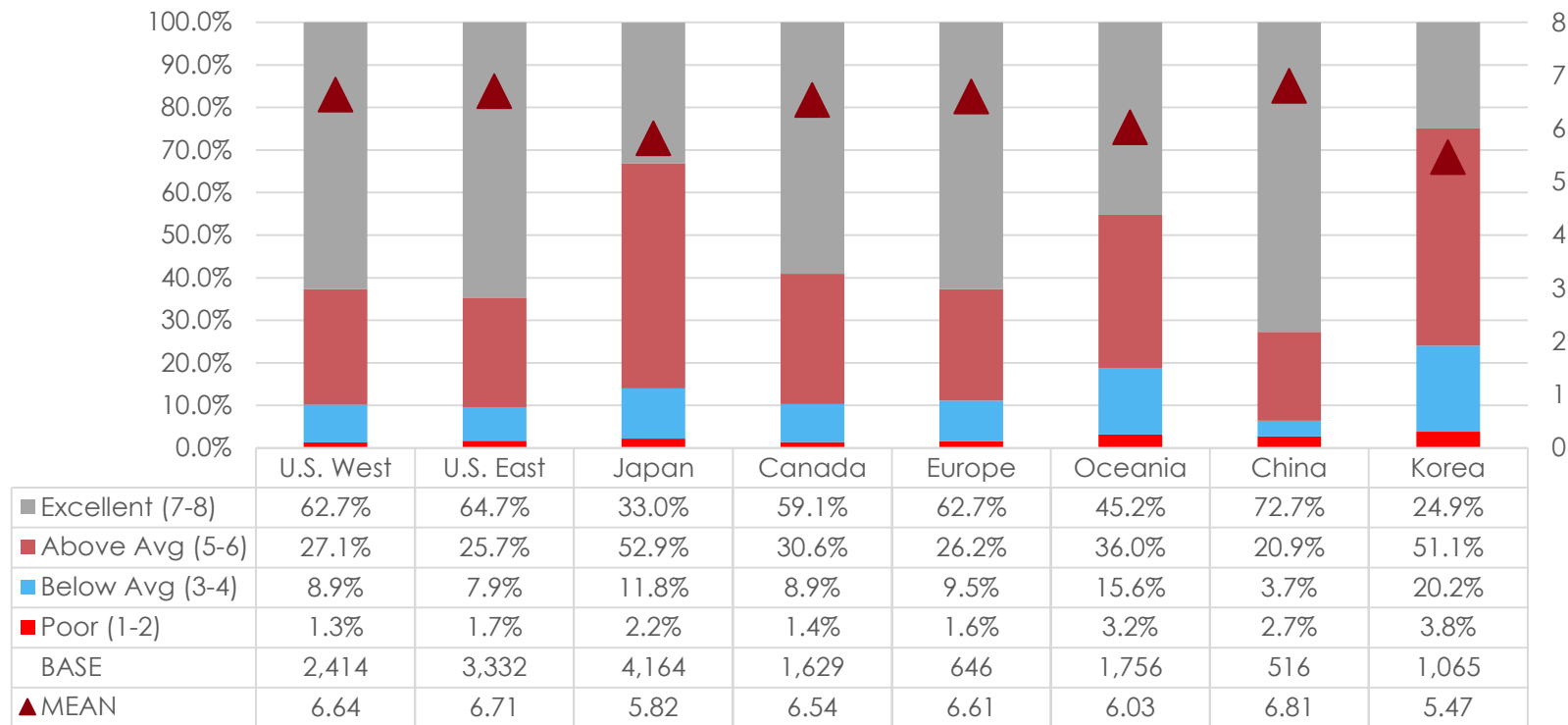


AREAS VISITED KOREA



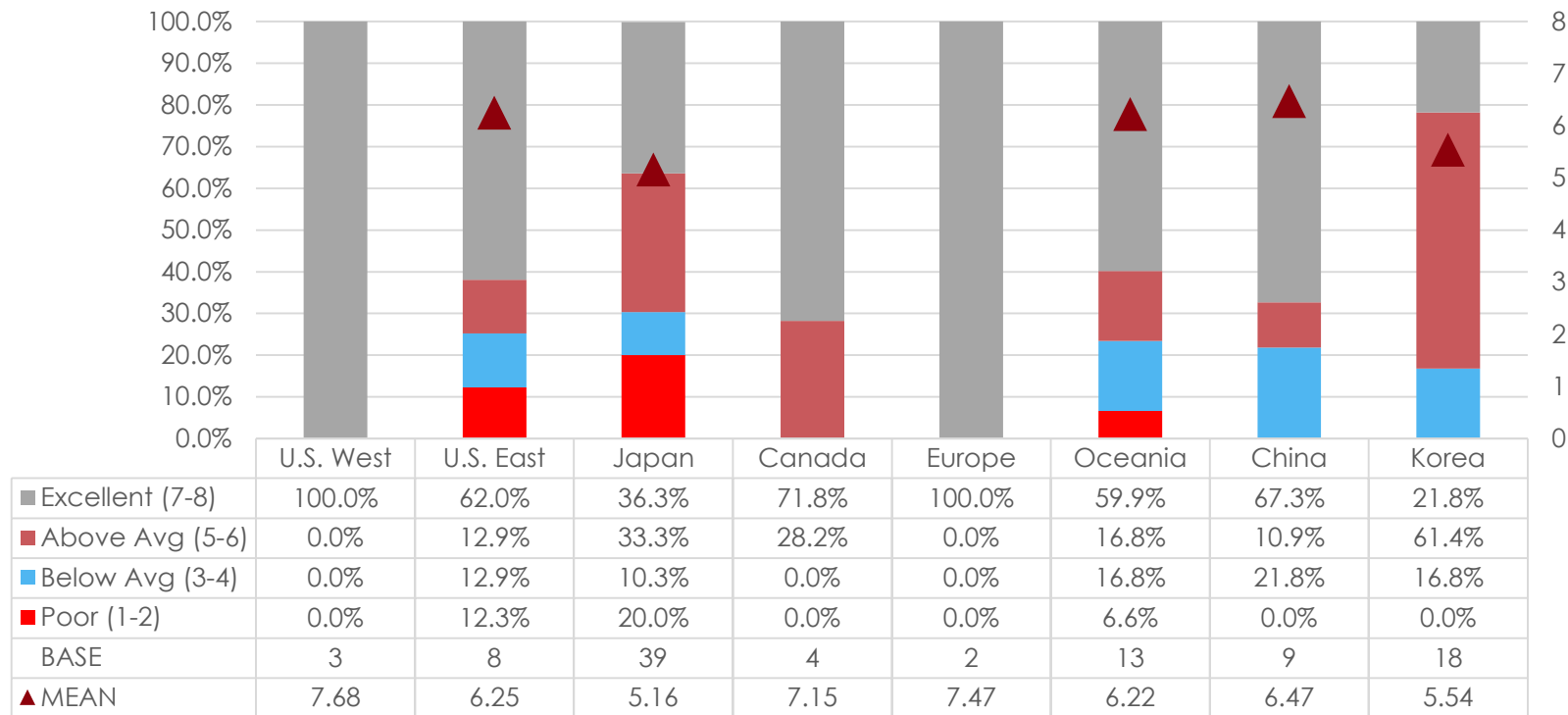
SATISFACTION – Daniel K. Inouye International Airport

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

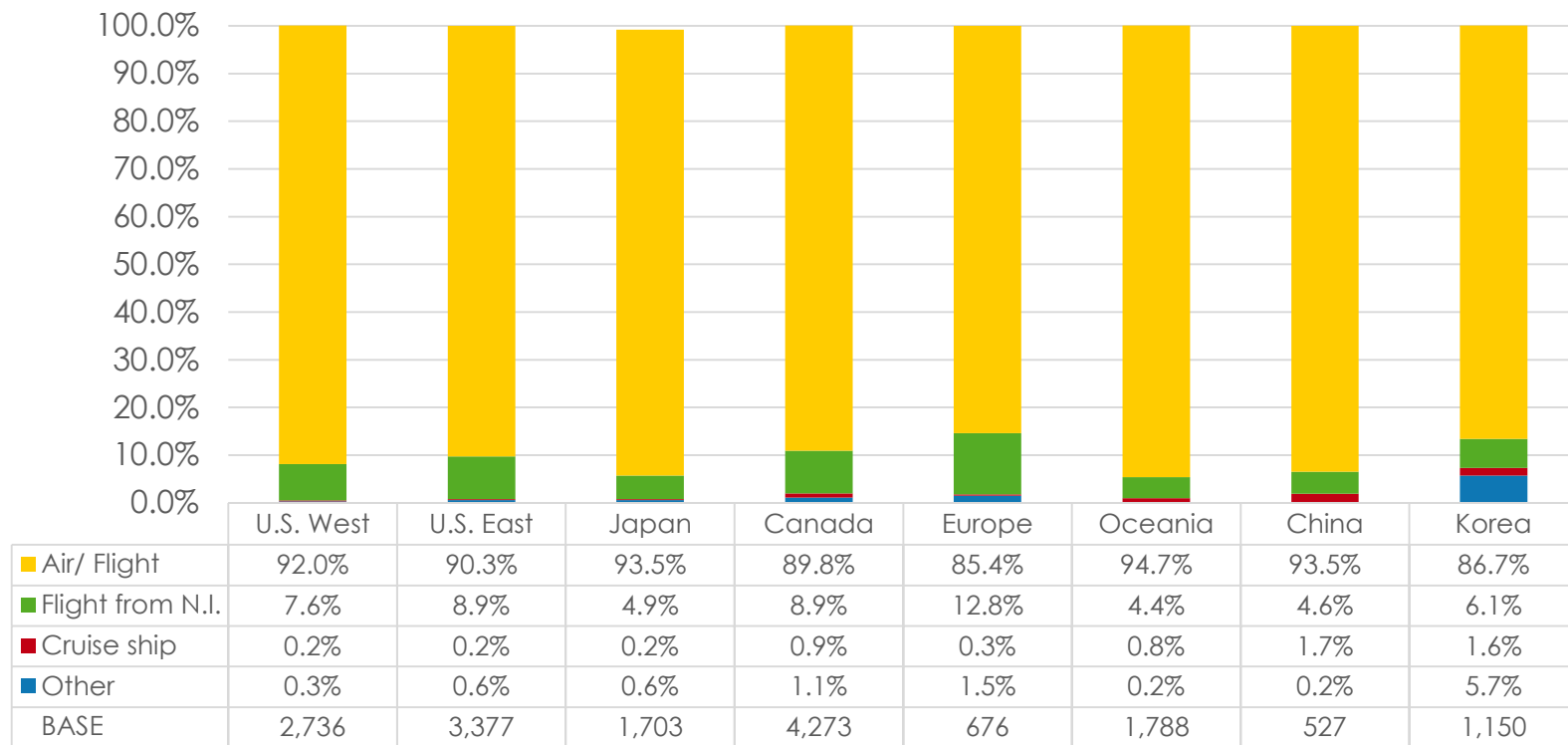


SATISFACTION – Honolulu Harbor

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



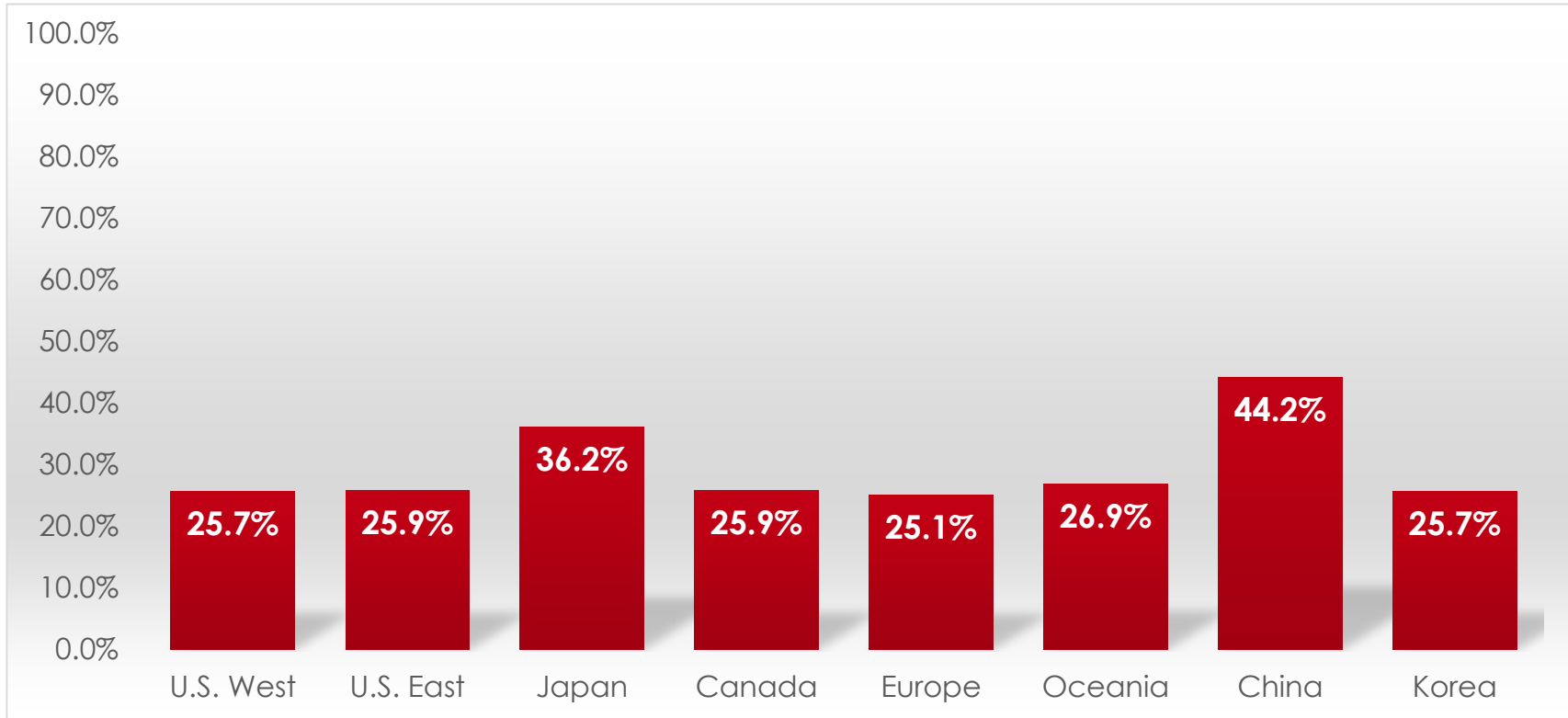
TRANSPAC TRAVEL OPTIONS – O‘AHU



SECTION – KAUA‘I

ADVERTISING AWARENESS – KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

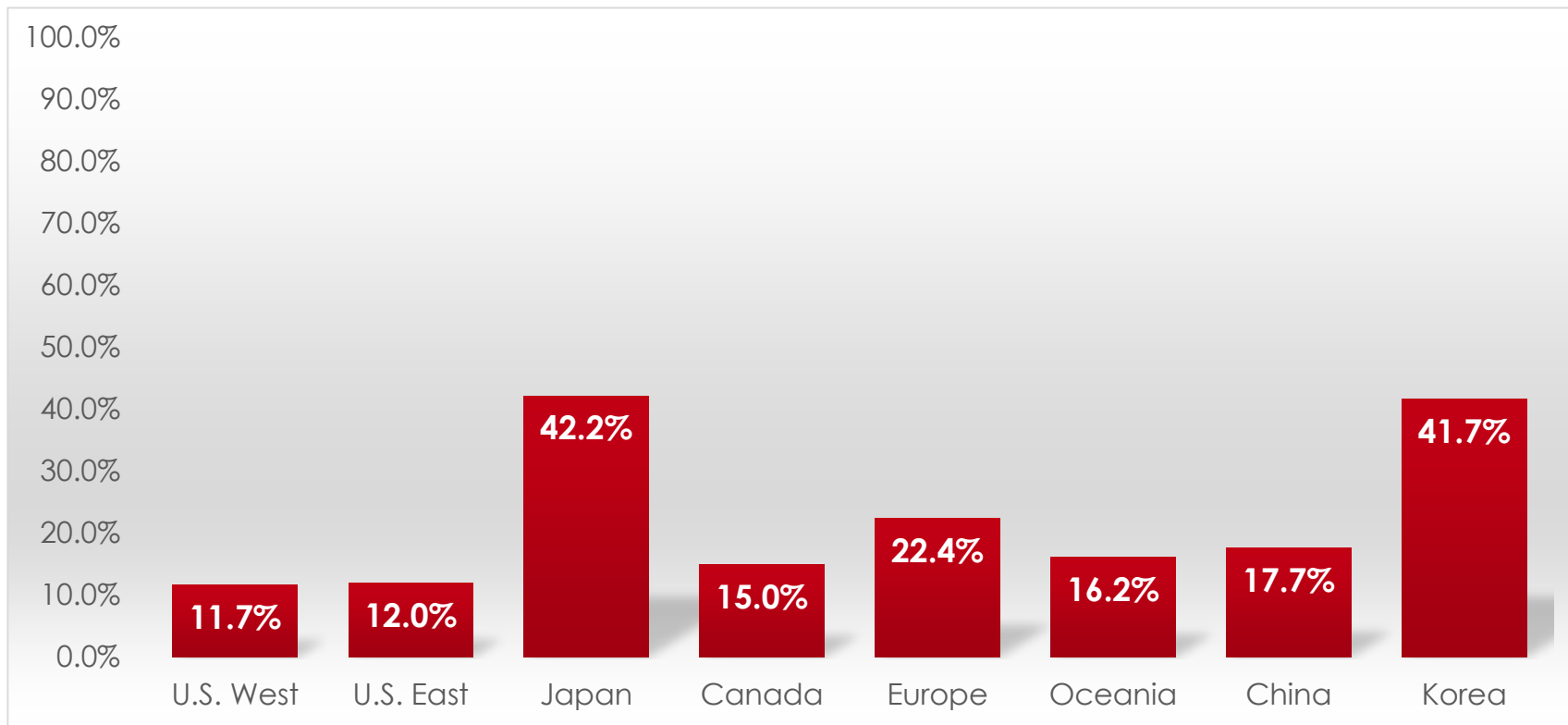


ADVERTISING AWARENESS – KAUA'I

- Among U.S. visitors, aided advertising awareness for Kaua'i increases with age with younger segments of the sample the least likely to have been exposed to marketing for the island.
- Visitors without a college degree from the U.S. were more likely to be exposed to marketing than were more educated visitors.
- First-time visitors to Kaua'i were less likely to be exposed to advertising for the island compared to repeat visitors in the following MMAs: U.S. West, U.S. East, and Canada.

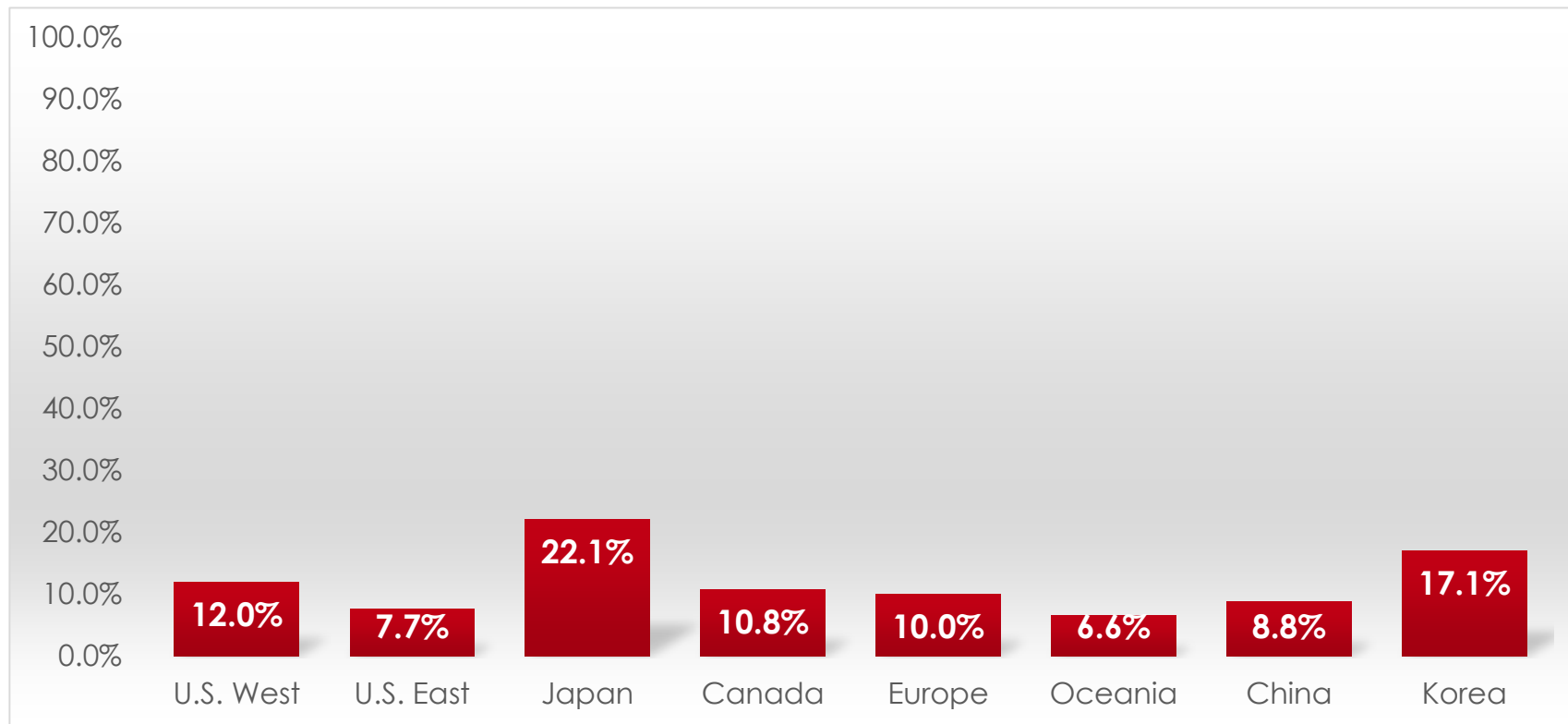
IMPACT OF LOCATION FILMING– KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

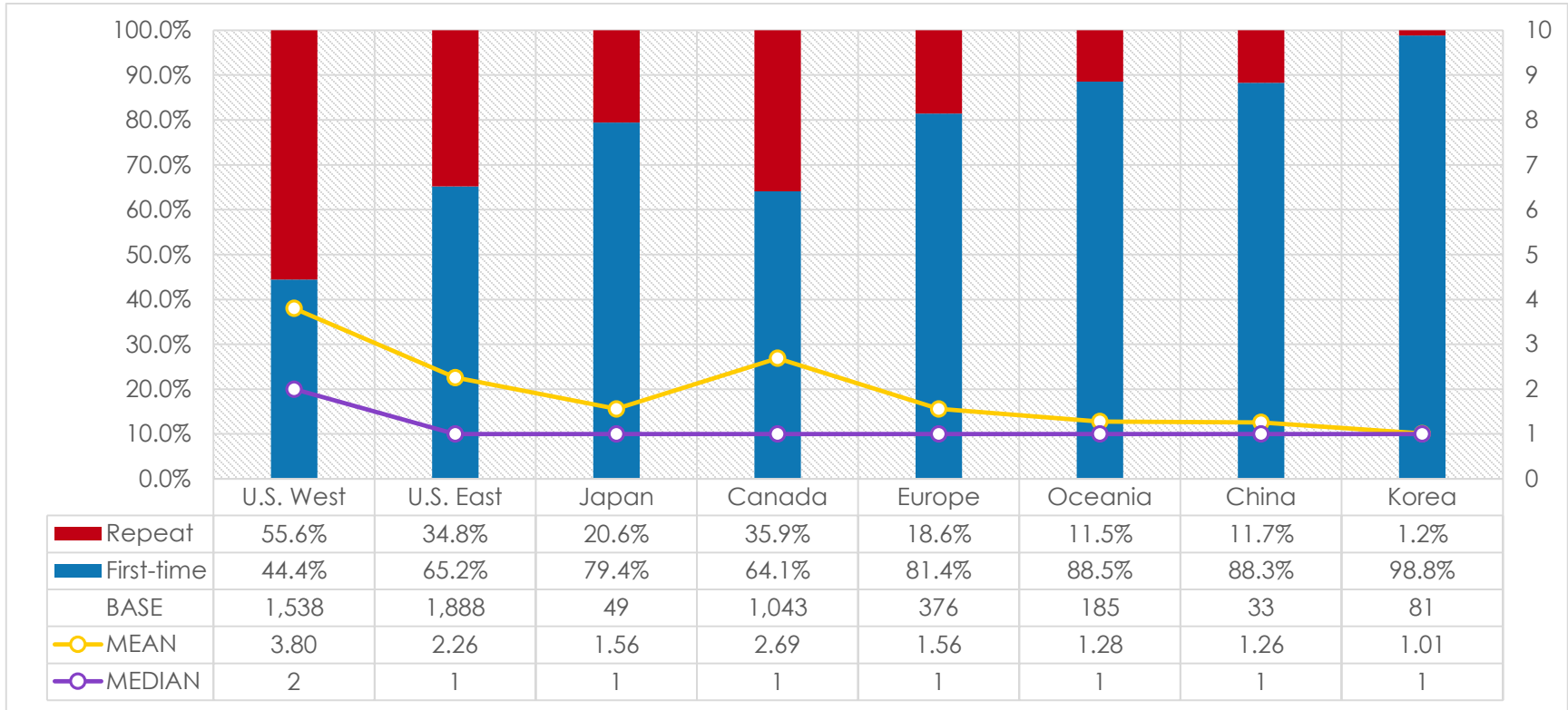


IMPACT OF HAWAIIAN MUSIC – KAUA‘I

Caution small base: Japan, China, and Korea less than 100 respondents



1ST TIME VS REPEAT VISITOR - KAUA'I



1ST TIME VS REPEAT VISITOR - KAUA'I

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among U.S. visitors, males had a higher probability of being repeat visitors to the island than did females.
- Among U.S. West visitors the frequency of visits to Kaua'i is higher among those in smaller travel parties.
- Among visitors hailing from the U.S., the number of visits to Kaua'i increases as they become more affluent.

ACCOMMODATIONS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Hotel | 32.6% | 34.7% | 47.2% | 27.7% | 53.0% | 33.8% | 69.2% | 63.0% |
| Condominium | 27.8% | 17.5% | 6.2% | 29.9% | 13.7% | 15.1% | 6.2% | 0.0% |
| Timeshare | 26.0% | 18.6% | 12.3% | 19.4% | 5.4% | 4.1% | 6.2% | 1.3% |
| Cruise ship | 5.3% | 20.9% | 14.1% | 9.9% | 11.0% | 34.4% | 9.3% | 0.0% |
| Rental house | 12.4% | 8.4% | 6.2% | 14.0% | 7.7% | 4.7% | 6.0% | 6.1% |
| Friend/ relative | 6.6% | 4.2% | 0.0% | 3.6% | 3.6% | 3.1% | 3.1% | 0.0% |
| Camping/ beach | 1.2% | 0.7% | 1.9% | 3.4% | 2.6% | 0.5% | 0.0% | 1.3% |
| Day trip | 0.7% | 1.2% | 14.2% | 0.5% | 1.6% | 3.4% | 6.0% | 22.1% |

STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-----------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Natural beauty | 38.5% | 47.3% | 61.4% | 47.9% | 55.7% | 39.2% | 42.3% | 67.7% |
| Variety of activities | 13.9% | 16.9% | 12.0% | 14.1% | 12.4% | 20.9% | 18.0% | 14.8% |
| Aloha spirit | 9.6% | 8.0% | 4.1% | 9.3% | 10.1% | 5.6% | 12.0% | 2.5% |
| Beach/ ocean | 11.0% | 5.6% | 1.9% | 9.0% | 4.1% | 1.4% | 3.1% | 2.5% |
| Customer service | 6.8% | 5.1% | 4.1% | 3.4% | 4.0% | 10.1% | 3.1% | 6.3% |
| Local culture | 5.9% | 4.9% | 4.0% | 4.3% | 3.6% | 8.4% | 3.1% | 2.5% |

STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

- Younger visitors, particularly those under 35 from U.S. West, U.S. East, and Canada were more likely to single out Kaua'i's natural beauty than were older visitors from these MMAs.
- When segmented by repeat vs first-time visitors to Kaua'i from the U.S. we find that first-time visitors focus more on the natural beauty of the island and the variety of activities when asked about positive aspects of their trip while repeat visitors place a greater emphasis on things like the aloha spirit, the hospitality of the locals they come into contact with, and local culture.

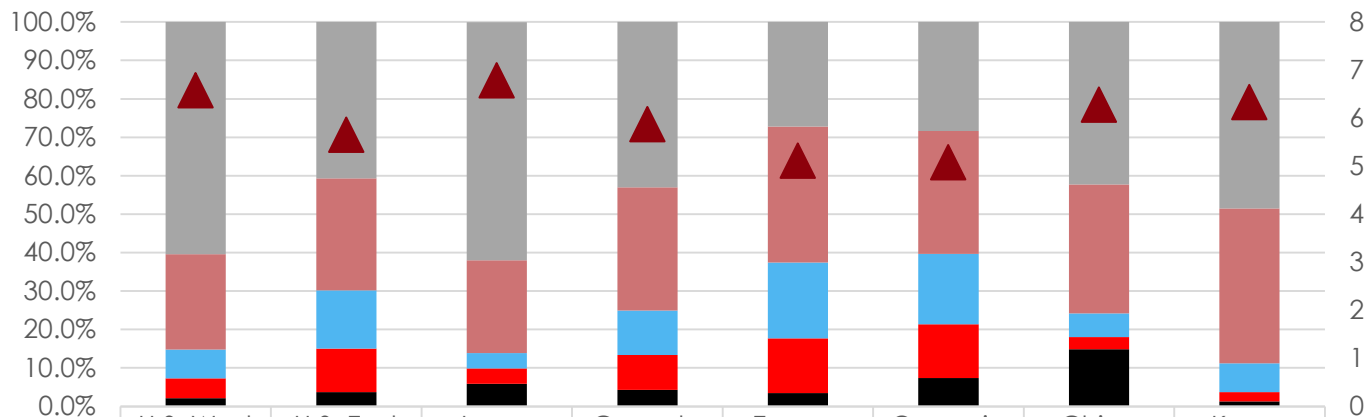
AREAS OF OPPORTUNITIES - KAUA'I

Caution small base: Japan, China, and Korea less than 100 respondents

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Nothing | 37.5% | 47.1% | 40.8% | 36.9% | 44.5% | 48.2% | 51.4% | 38.5% |
| Traffic | 22.3% | 17.4% | 4.1% | 21.7% | 6.5% | 7.7% | 6.2% | 3.7% |
| Driving experience | 6.4% | 5.1% | 2.1% | 5.6% | 4.1% | 5.7% | 3.1% | 2.5% |
| Not enough local culture | 6.0% | 4.7% | 6.1% | 4.3% | 10.1% | 6.2% | 6.0% | 10.2% |
| Food – variety | 4.4% | 3.9% | 4.1% | 3.8% | 4.8% | 2.3% | 9.3% | 12.5% |
| Rental car | 3.8% | 3.1% | 0.0% | 3.5% | 2.2% | 4.2% | 0.0% | 1.3% |
| Variety of attractions | 2.5% | 2.8% | 4.0% | 2.3% | 5.4% | 5.4% | 12.0% | 10.0% |

LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| ■ Very likely (7-8) | 60.5% | 40.7% | 61.9% | 43.0% | 27.3% | 28.4% | 42.3% | 48.6% |
| ■ Somewhat likely (5-6) | 24.8% | 29.1% | 24.1% | 32.1% | 35.4% | 31.9% | 33.5% | 40.3% |
| ■ Somewhat unlikely (3-4) | 7.5% | 15.2% | 4.0% | 11.5% | 19.7% | 18.3% | 6.2% | 7.5% |
| ■ Very unlikely (1-2) | 5.2% | 11.3% | 4.0% | 9.1% | 14.2% | 14.0% | 3.1% | 2.4% |
| ■ Not sure | 2.1% | 3.7% | 5.9% | 4.3% | 3.5% | 7.4% | 14.9% | 1.3% |
| BASE | 1,530 | 1,869 | 49 | 1,038 | 368 | 185 | 33 | 80 |
| ▲ MEAN | 6.58 | 5.65 | 6.78 | 5.87 | 5.11 | 5.08 | 6.28 | 6.33 |

LIKELIHOOD OF RETURN VISIT – KAUA'I

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- When segmented by educational background we find those visitors without a college degree from U.S. West, U.S. East, and Canada were more likely to indicate they would return to Kaua'i than were those with a college degree from these areas.
- When segmented by repeat vs first-time visitors to Kaua'i from the U.S. we find that first-time visitors focus more on the natural beauty of the island and the variety of activities when asked about positive aspects of their trip while repeat visitors place a greater emphasis on things like the aloha spirit, the hospitality of the locals they come into contact with, and local culture.

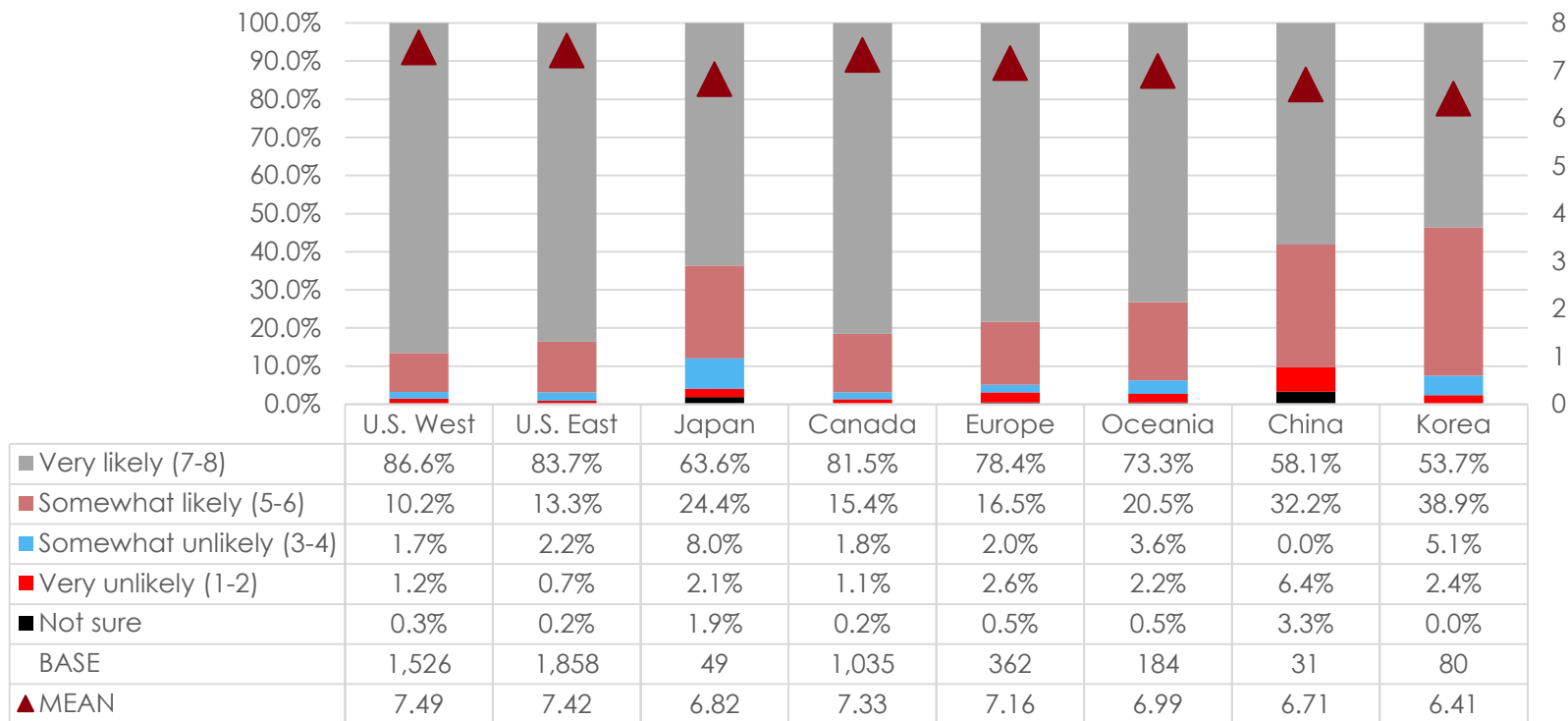
REASONS FOR NOT RETURNING - KAUA'I

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Want to visit someplace new | 48.1% | 49.1% | 0.0% | 60.4% | 42.1% | 53.6% | 36.9% | 45.0% |
| Cost/ expensive | 22.8% | 27.4% | 0.0% | 31.3% | 32.2% | 23.3% | 24.8% | 11.4% |
| Flight is too long | 10.1% | 30.2% | 0.0% | 22.5% | 54.1% | 2.8% | 12.0% | 22.8% |
| No compelling reason to return/ nothing new | 13.9% | 12.6% | 14.8% | 11.0% | 10.3% | 27.0% | 25.5% | 10.7% |
| Other financial obligations | 7.7% | 12.0% | 70.4% | 8.9% | 8.8% | 6.5% | 0.0% | 0.0% |
| Not enough value | 11.8% | 5.5% | 0.0% | 8.1% | 6.0% | 5.6% | 24.8% | 0.0% |
| Too crowded/ congested | 8.1% | 4.8% | 0.0% | 6.4% | 3.7% | 3.2% | 12.8% | 10.7% |
| Poor health/ age | 5.5% | 6.9% | 0.0% | 5.2% | 4.5% | 3.2% | 12.8% | 0.0% |

KAUA'I - BRAND/DESTINATION – ADVOCACY

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



KAUA'I - BRAND/DESTINATION – ADVOCACY

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among visitors from U.S. East, young travelers under the age of 35 are the strongest advocates for Kaua'i.
- Among visitors from U.S. West we find those who visited just Kaua'i were stronger advocates than were visitors from this MMA who also ventured to another island during their trip.

KAUA'I ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.0% | 96.8% | 97.9% | 97.1% | 95.2% | 97.7% | 80.8 | 96.2% |
| On own (self-guided) | 87.4% | 74.7% | 51.4% | 84.6% | 80.1% | 54.2% | 61.4% | 61.1% |
| Helicopter/ airplane | 14.8% | 22.2% | 6.2% | 19.8% | 28.6% | 16.4% | 19.4% | 15.0% |
| Boat/ submarine/ whale | 27.4% | 29.4% | 6.2% | 26.9% | 25.3% | 16.4% | 26.0% | 6.1% |
| Visit towns | 64.9% | 55.8% | 26.8% | 63.9% | 46.0% | 43.6% | 32.2% | 20.2% |
| Limo/ van/ bus tour | 5.6% | 14.4% | 34.5% | 7.5% | 10.3% | 24.4% | 15.7% | 22.5% |
| Scenic views/ natural landmark | 71.8% | 71.1% | 41.0% | 76.3% | 69.3% | 59.5% | 61.6% | 49.9% |
| Movie/ TV/ film location | 5.1% | 8.5% | 10.3% | 4.8% | 4.7% | 9.4% | 16.3% | 16.3% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.5% | 92.5% | 94.1% | 96.7% | 91.9% | 90.5% | 83.9% | 87.4% |
| Beach/ sunbathing | 82.3% | 71.7% | 41.0% | 84.4% | 76.8% | 53.0% | 68.0% | 51.0% |
| Bodyboard/ Standup paddle board | 15.4% | 7.0% | 4.0% | 13.5% | 7.6% | 2.7% | 6.4% | 3.7% |
| Surfing | 6.3% | 4.4% | 0.0% | 10.0% | 6.9% | 3.3% | 16.1% | 2.5% |
| Canoeing/ kayak | 15.4% | 10.5% | 0.0% | 12.0% | 10.8% | 5.9% | 6.4% | 2.4% |
| Swim- ocean | 62.0% | 50.1% | 14.5% | 69.0% | 58.8% | 36.8% | 28.9% | 21.0% |
| Snorkel | 45.7% | 31.9% | 8.1% | 46.3% | 38.1% | 23.7% | 22.3% | 15.0% |
| Windsurf/ Kitesurf | 0.2% | 0.0% | 0.0% | 0.3% | 0.3% | 0.0% | 3.1% | 0.0% |
| Jet ski/ Parasail | 0.2% | 0.1% | 2.1% | 0.1% | 0.0% | 0.0% | 3.1% | 0.0% |
| Scuba | 2.2% | 1.8% | 0.0% | 2.6% | 2.3% | 1.0% | 6.4% | 0.0% |
| Fishing | 3.3% | 2.1% | 0.0% | 2.3% | 0.3% | 1.2% | 9.5% | 0.0% |
| Golf | 8.4% | 5.8% | 6.2% | 10.1% | 1.6% | 5.2% | 9.5% | 3.8% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.5% | 92.5% | 94.1% | 96.7% | 91.9% | 90.5% | 83.9% | 87.4% |
| Run/ Jog/ Fitness walk | 30.0% | 23.5% | 4.1% | 33.9% | 12.7% | 14.4% | 16.1% | 4.9% |
| Spa | 8.5% | 6.7% | 2.1% | 6.1% | 3.6% | 7.8% | 19.2% | 6.3% |
| Hiking/Backpack/Camp | 37.2% | 33.9% | 6.2% | 43.1% | 31.4% | 11.7% | 16.3% | 14.9% |
| Agritourism | 11.6% | 13.9% | 28.6% | 10.2% | 4.3% | 8.3% | 19.4% | 31.2% |
| Sport event/ tournament | 0.9% | 0.3% | 0.0% | 1.1% | 0.5% | 0.5% | 3.1% | 1.3% |
| Park/ botanical garden | 41.1% | 43.0% | 44.9% | 41.6% | 38.6% | 42.0% | 48.3% | 17.6% |
| Waterpark | 0.7% | 0.4% | 0.0% | 0.8% | 1.4% | 2.2% | 19.0% | 0.0% |
| Mountain tube/ waterfall rappel | 7.1% | 4.6% | 0.0% | 4.4% | 4.7% | 5.6% | 3.1% | 3.8% |
| Zip-lining | 6.3% | 6.9% | 0.0% | 3.5% | 2.8% | 6.1% | 6.4% | 1.3% |
| Skydiving | 0.2% | 0.2% | 0.0% | 0.1% | 0.5% | 0.0% | 15.7% | 0.0% |
| All terrain vehicle (ATV) | 4.8% | 5.7% | 0.0% | 3.9% | 5.0% | 3.0% | 6.2% | 0.0% |
| Horseback riding | 2.5% | 1.5% | 0.0% | 2.2% | 1.4% | 1.2% | 12.6% | 0.0% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.9% | 93.6% | 85.8% | 95.9% | 93.0% | 91.1% | 90.3% | 96.3% |
| Lunch/ sunset/ dinner/ evening cruise | 23.2% | 25.5% | 10.1% | 22.6% | 26.6% | 16.9% | 51.6% | 27.4% |
| Live music/ stage show | 27.2% | 26.8% | 16.4% | 27.2% | 20.1% | 16.1% | 9.5% | 3.7% |
| Nightclub/ dancing/ bar/ karaoke | 5.5% | 5.9% | 4.1% | 5.4% | 1.7% | 2.1% | 9.5% | 0.0% |
| Fine dining | 53.3% | 46.5% | 26.7% | 44.2% | 33.1% | 33.7% | 38.6% | 23.9% |
| Family restaurant | 60.5% | 49.2% | 10.3% | 54.1% | 36.3% | 38.0% | 12.6% | 16.1% |
| Fast food | 30.5% | 23.6% | 14.2% | 37.2% | 31.3% | 23.1% | 38.9% | 30.0% |
| Food truck | 33.7% | 29.8% | 6.1% | 37.0% | 27.2% | 16.9% | 19.2% | 18.6% |
| Café/ coffee house | 45.0% | 37.1% | 32.9% | 49.6% | 42.1% | 53.6% | 28.9% | 31.2% |
| Ethnic dining | 26.8% | 26.0% | 4.1% | 22.8% | 14.9% | 8.8% | 9.5% | 27.5% |
| Prepared own meal | 60.3% | 39.3% | 14.5% | 66.9% | 37.1% | 30.1% | 16.5% | 13.6% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.1% | 91.2% | 85.8% | 94.5% | 93.2% | 87.0% | 87.0% | 80.1% |
| Mall/ department store | 25.1% | 20.8% | 40.9% | 38.4% | 32.3% | 33.1% | 45.3% | 21.4% |
| Designer boutique | 17.0% | 15.4% | 6.2% | 17.8% | 11.7% | 12.6% | 9.5% | 1.3% |
| Hotel/ resort store | 23.2% | 23.9% | 24.8% | 19.8% | 14.0% | 14.4% | 15.9% | 13.7% |
| Swap meet/ flea market | 8.5% | 5.9% | 2.1% | 9.6% | 2.5% | 3.3% | 3.1% | 0.0% |
| Discount/ outlet store | 12.7% | 12.0% | 1.9% | 13.0% | 6.5% | 11.1% | 25.8% | 21.4% |
| Supermarket | 71.0% | 52.3% | 47.0% | 71.7% | 70.0% | 42.5% | 44.8% | 41.0% |
| Farmer's market | 41.2% | 31.0% | 8.1% | 47.7% | 34.5% | 21.2% | 19.4% | 6.2% |
| Convenience store | 39.0% | 34.6% | 2.1% | 37.5% | 18.0% | 28.6% | 26.0% | 24.8% |
| Duty free store | 1.0% | 1.3% | 6.2% | 2.0% | 1.3% | 1.7% | 28.9% | 8.8% |
| Local shop/ artisan | 74.9% | 71.0% | 20.5% | 70.8% | 58.1% | 57.6% | 32.5% | 11.2% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 64.4% | 64.5% | 67.5% | 63.4% | 56.7% | 59.1% | 70.9% | 65.1% |
| Historic military site | 4.3% | 6.7% | 18.5% | 4.8% | 6.0% | 9.0% | 28.7% | 7.6% |
| Other historical site | 27.9% | 26.8% | 36.9% | 27.7% | 24.7% | 26.6% | 22.5% | 38.9% |
| Museum/ art gallery | 15.4% | 13.2% | 8.3% | 16.5% | 9.9% | 9.9% | 22.3% | 6.3% |
| Luau/ Polynesian show/ hula show | 26.2% | 30.6% | 8.1% | 27.3% | 21.9% | 23.0% | 6.4% | 7.4% |
| Lesson- ex. ukulele, hula, canoe, lei making | 4.7% | 5.3% | 12.3% | 5.8% | 3.9% | 4.4% | 16.1% | 1.3% |
| Play/ concert/ theatre | 2.8% | 1.8% | 4.1% | 4.1% | 3.5% | 3.5% | 3.1% | 3.8% |
| Art/ craft fair | 17.8% | 14.1% | 0.0% | 16.8% | 9.3% | 4.6% | 13.2% | 6.2% |
| Festival event | 4.9% | 3.3% | 2.1% | 4.1% | 2.8% | 3.1% | 0.0% | 2.5% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 94.9% | 94.8% | 97.9% | 95.5% | 93.3% | 95.5% | 93.8% | 95.0% |
| Airport shuttle | 15.6% | 13.1% | 18.6% | 14.2% | 14.6% | 19.2% | 9.7% | 6.3% |
| Trolley | 0.6% | 2.0% | 0.0% | 0.8% | 2.0% | 4.5% | 0.0% | 1.3% |
| Public bus | 1.2% | 1.6% | 2.1% | 2.0% | 2.6% | 5.0% | 3.1% | 2.5% |
| Tour bus/ tour van | 6.8% | 20.1% | 48.6% | 9.7% | 11.7% | 39.1% | 32.0% | 48.9% |
| Taxi/ limo | 3.6% | 5.0% | 14.2% | 7.2% | 9.0% | 13.7% | 16.1% | 6.3% |
| Rental car | 87.6% | 73.6% | 37.2% | 85.8% | 75.7% | 48.7% | 58.3% | 41.0% |
| Ride share | 3.5% | 4.2% | 2.1% | 3.1% | 1.7% | 7.2% | 9.5% | 1.3% |
| Bicycle rental | 4.1% | 3.7% | 0.0% | 6.5% | 2.5% | 1.6% | 3.3% | 0.0% |

Caution small base: Japan, China, and Korea less than 100 respondents

KAUA'I ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 18.6% | 12.6% | 8.1% | 15.1% | 9.1% | 10.7% | 19.4% | 23.8% |
| Visit friends/ family | 17.4% | 11.8% | 6.2% | 13.5% | 7.5% | 10.7% | 16.3% | 22.5% |
| Volunteer- non-profit | 1.9% | 1.3% | 1.9% | 2.4% | 1.9% | 0.0% | 3.1% | 2.5% |

Caution small base: Japan, China, and Korea less than 100 respondents

ATTRACTIONS – KAUA'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|----------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Fern Grotto | 13.4% | 13.9% | 49.2% | 11.9% | 12.8% | 20.0% | 19.0% | 3.8% |
| Hanalei | 58.3% | 46.5% | 30.8% | 61.4% | 54.0% | 36.6% | 29.1% | 16.1% |
| Kalapaki Beach | 26.4% | 28.2% | 10.3% | 36.3% | 32.1% | 18.1% | 45.3% | 8.7% |
| Kaua'i Museum | 4.8% | 4.7% | 4.1% | 6.1% | 3.3% | 4.5% | 28.5% | 5.0% |
| Kilauea Lighthouse | 40.6% | 37.7% | 26.8% | 42.5% | 38.9% | 29.3% | 38.9% | 21.3% |
| Koke'e | 11.1% | 11.6% | 8.3% | 19.5% | 22.1% | 8.5% | 22.7% | 6.3% |
| Koke'e Museum | 2.5% | 2.3% | 4.1% | 4.2% | 3.4% | 2.7% | 6.4% | 3.7% |
| Lihu'e Town | 52.4% | 42.8% | 30.8% | 54.0% | 42.1% | 36.0% | 12.8% | 18.6% |
| Na Aina Kai Gardens | 3.7% | 2.6% | 2.1% | 3.4% | 3.0% | 2.1% | 12.6% | 2.5% |
| Napali Coast | 42.8% | 52.3% | 24.5% | 52.3% | 59.5% | 37.4% | 38.8% | 26.2% |

Caution small base: Japan, China, and Korea less than 100 respondents

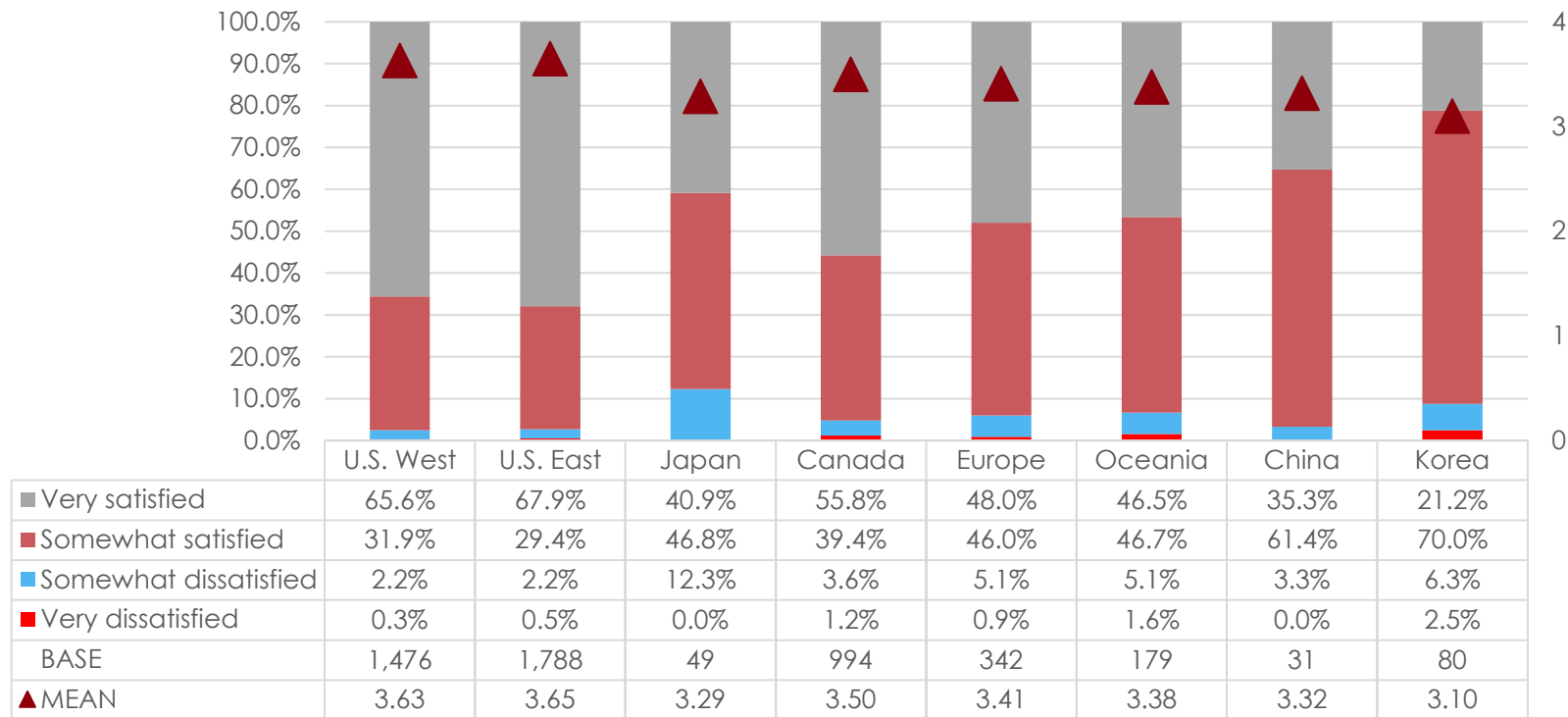
ATTRACTIONS – KAUA'I (cont.)

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Allerton Garden | 10.7% | 10.2% | 10.3% | 9.6% | 8.8% | 11.7% | 22.5% | 1.3% |
| Limahuli Garden | 4.3% | 4.0% | 6.2% | 3.4% | 5.4% | 5.0% | 12.6% | 2.5% |
| Old Koloa Town | 45.1% | 31.0% | 14.3% | 46.1% | 33.3% | 27.8% | 22.5% | 10.0% |
| Po'ipu Beach | 67.6% | 54.8% | 32.9% | 68.7% | 60.5% | 41.9% | 35.5% | 38.5% |
| Smith's Tropical Paradise Gardens | 54.6% | 45.6% | 14.3% | 58.0% | 40.3% | 36.0% | 15.7% | 11.1% |
| Princeville | 11.1% | 10.2% | 4.1% | 8.5% | 6.4% | 2.5% | 15.9% | 1.3% |
| Wailua Falls | 48.7% | 52.4% | 39.1% | 57.2% | 59.3% | 46.0% | 61.6% | 51.2% |
| Waimea Canyon | 59.2% | 66.1% | 75.6% | 71.5% | 75.7% | 61.6% | 41.9% | 62.4% |

Caution small base: Japan, China, and Korea less than 100 respondents

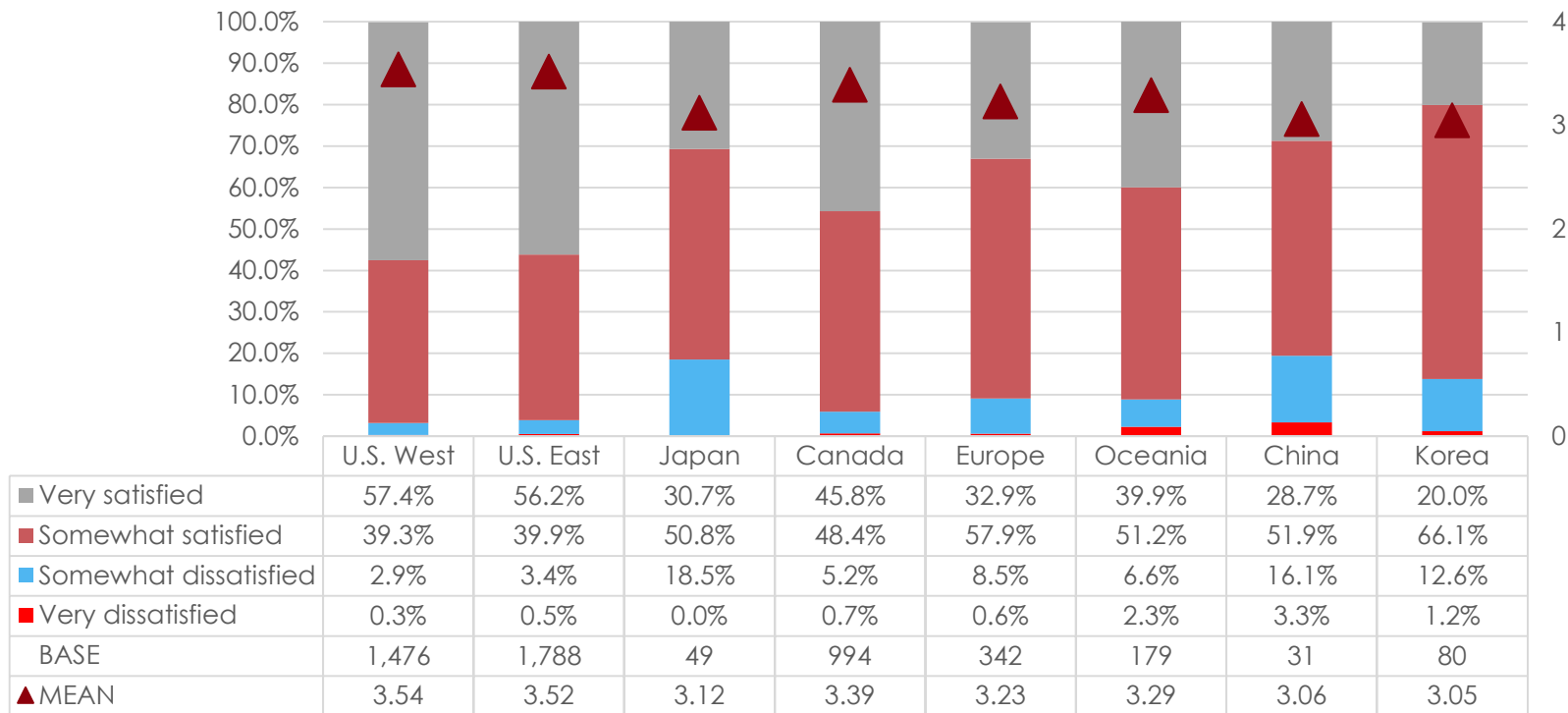
SATISFACTION – ENTERTAINMENT

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



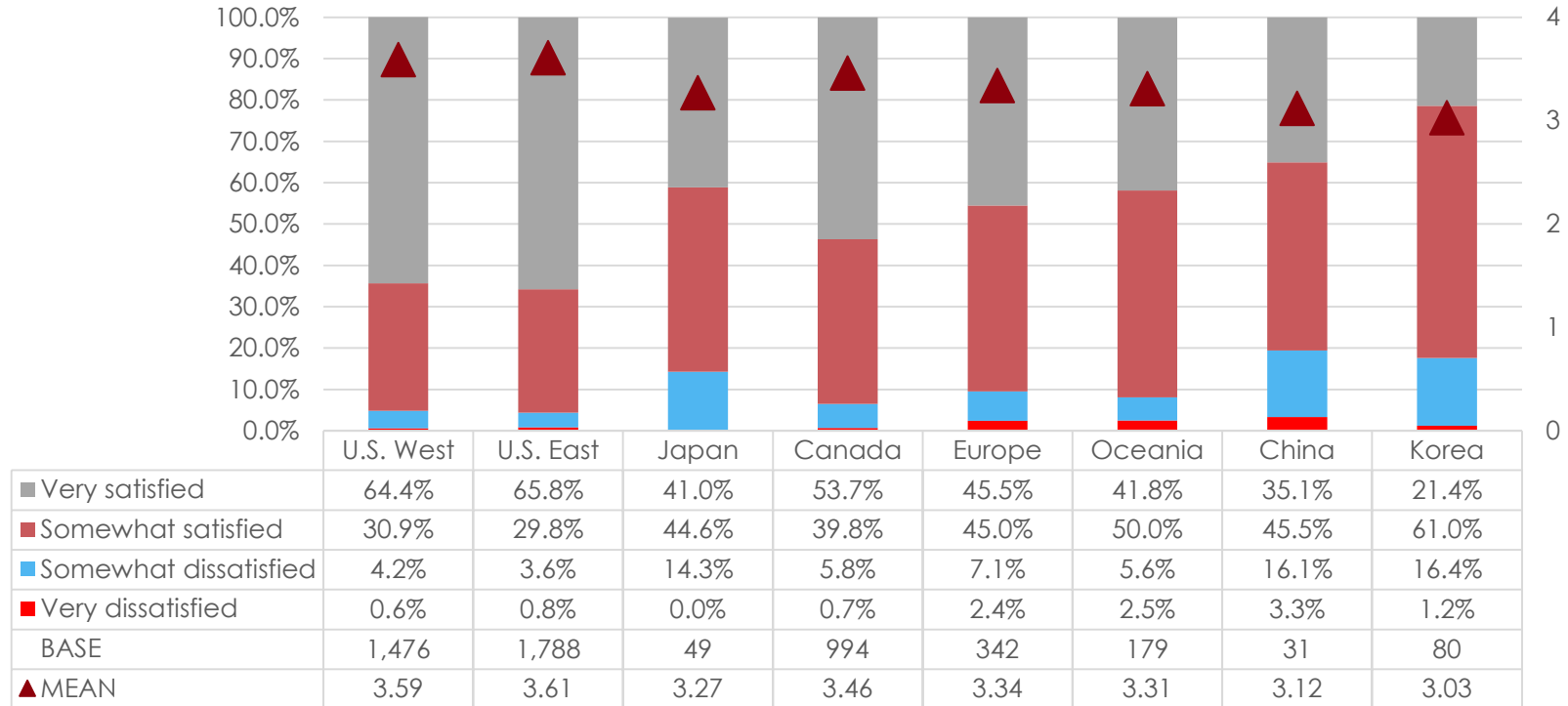
SATISFACTION – SHOPPING

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



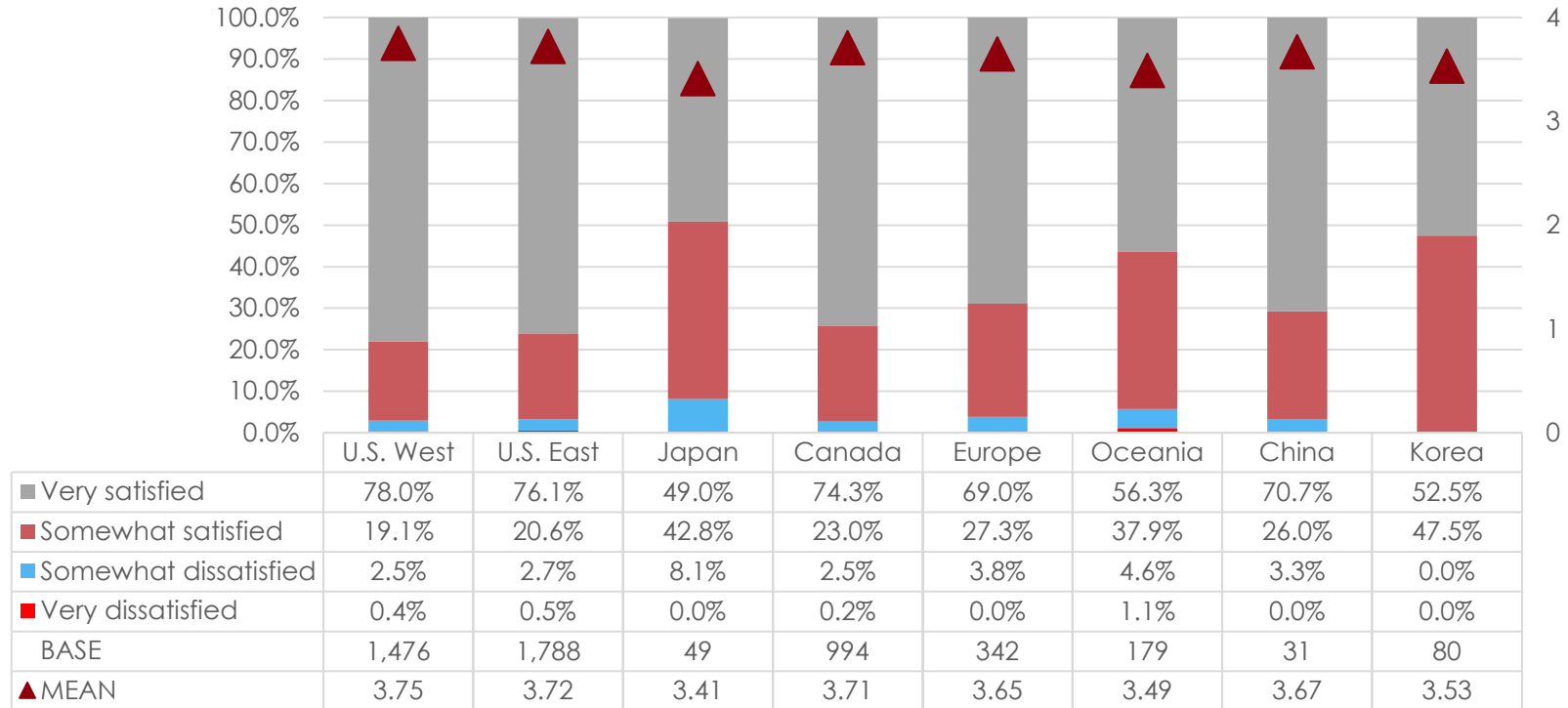
SATISFACTION – DINING

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



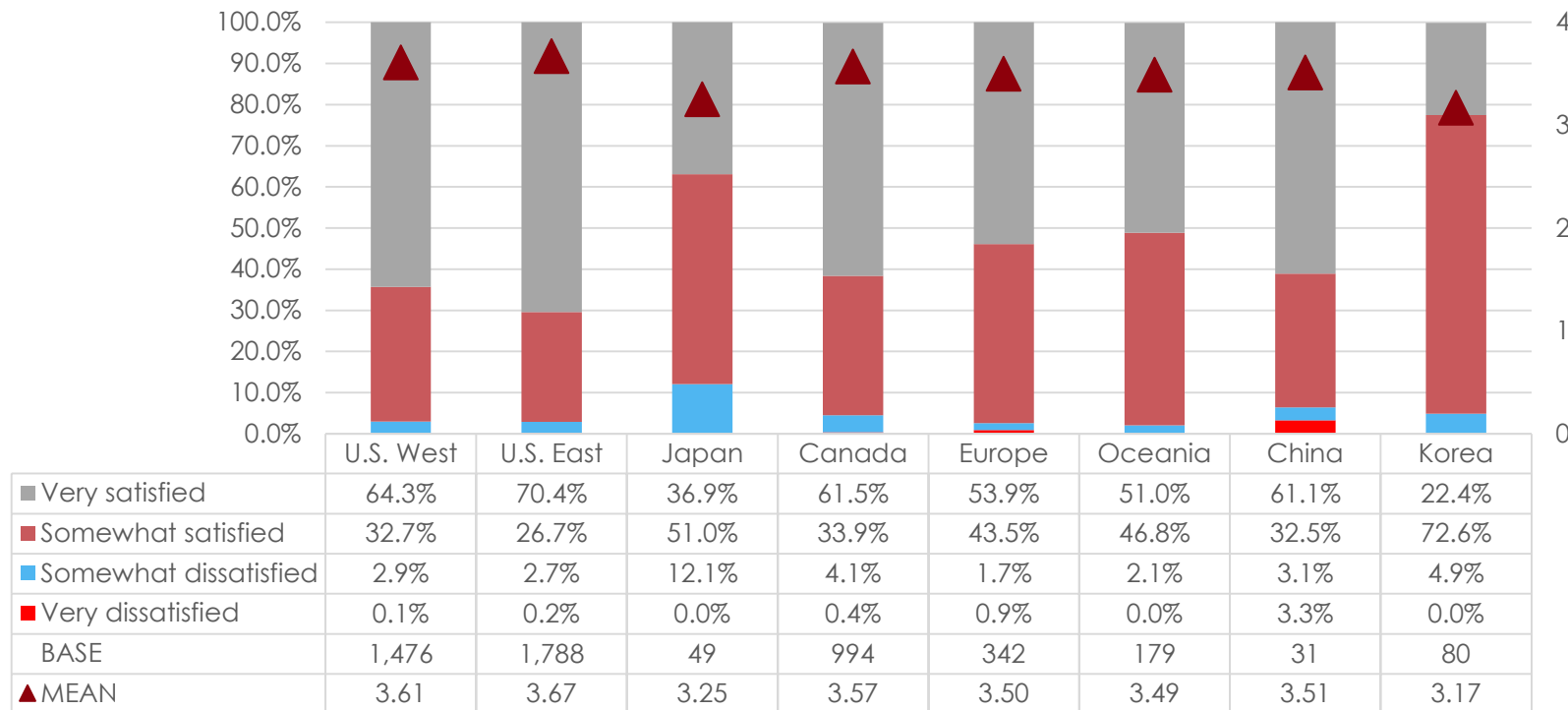
SATISFACTION – BEACHES

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



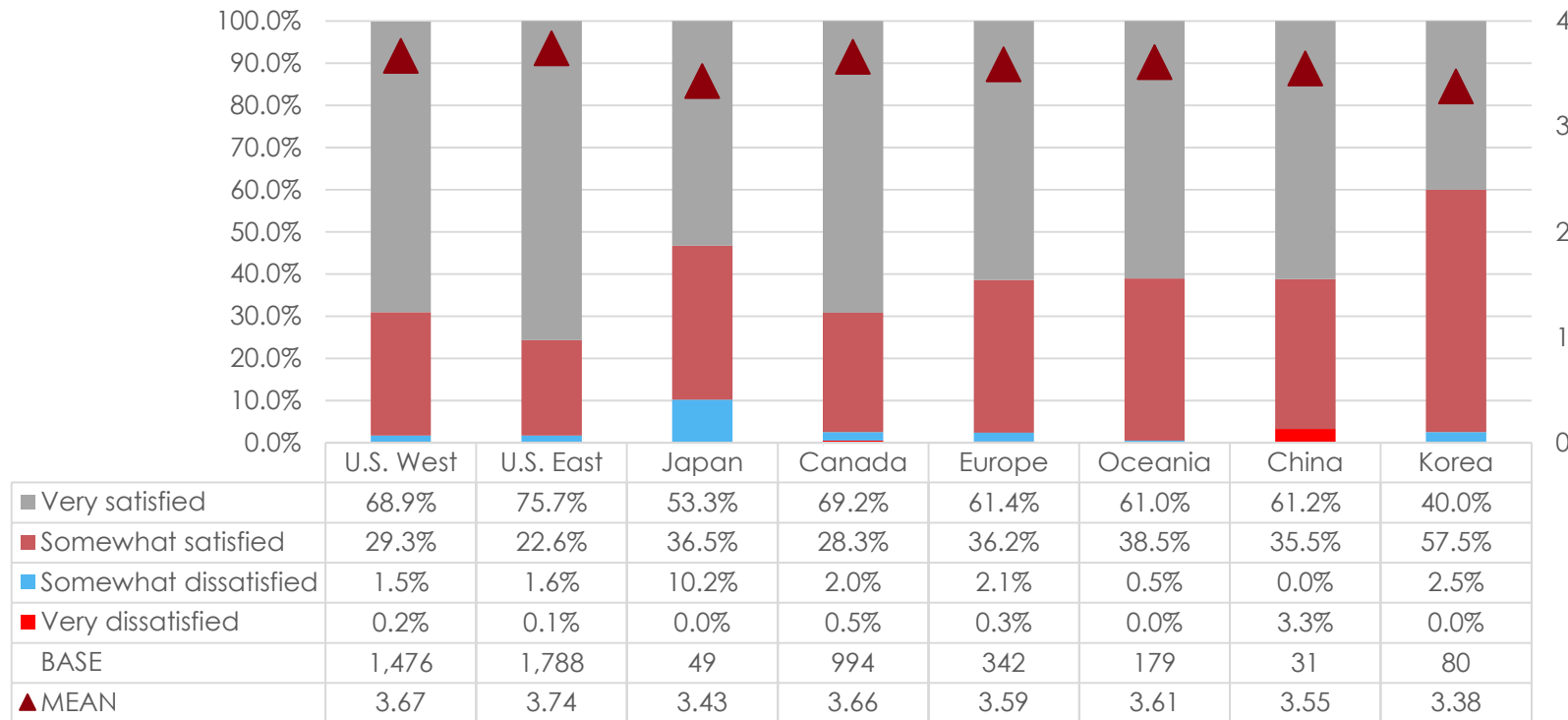
SATISFACTION – PUBLIC AREAS

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



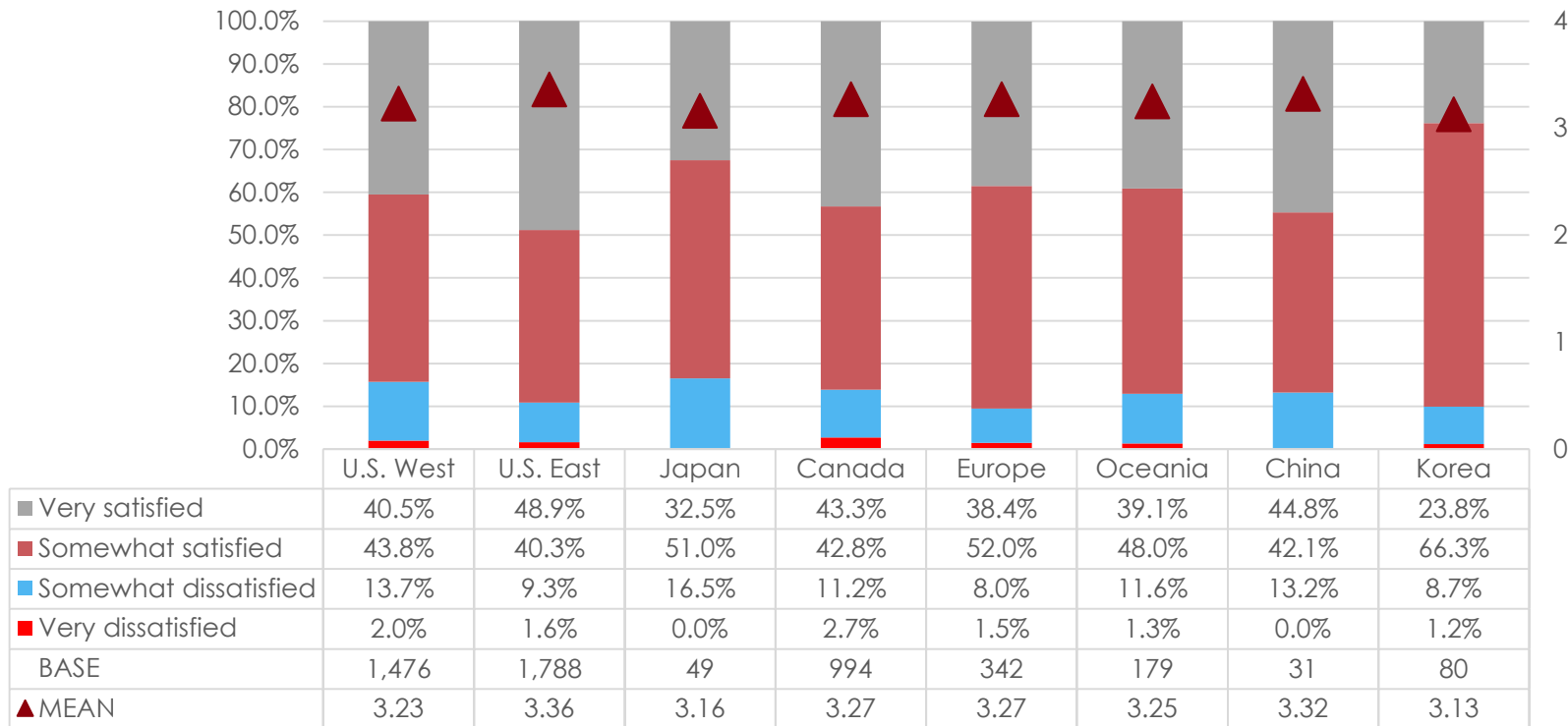
SATISFACTION – PARKS

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



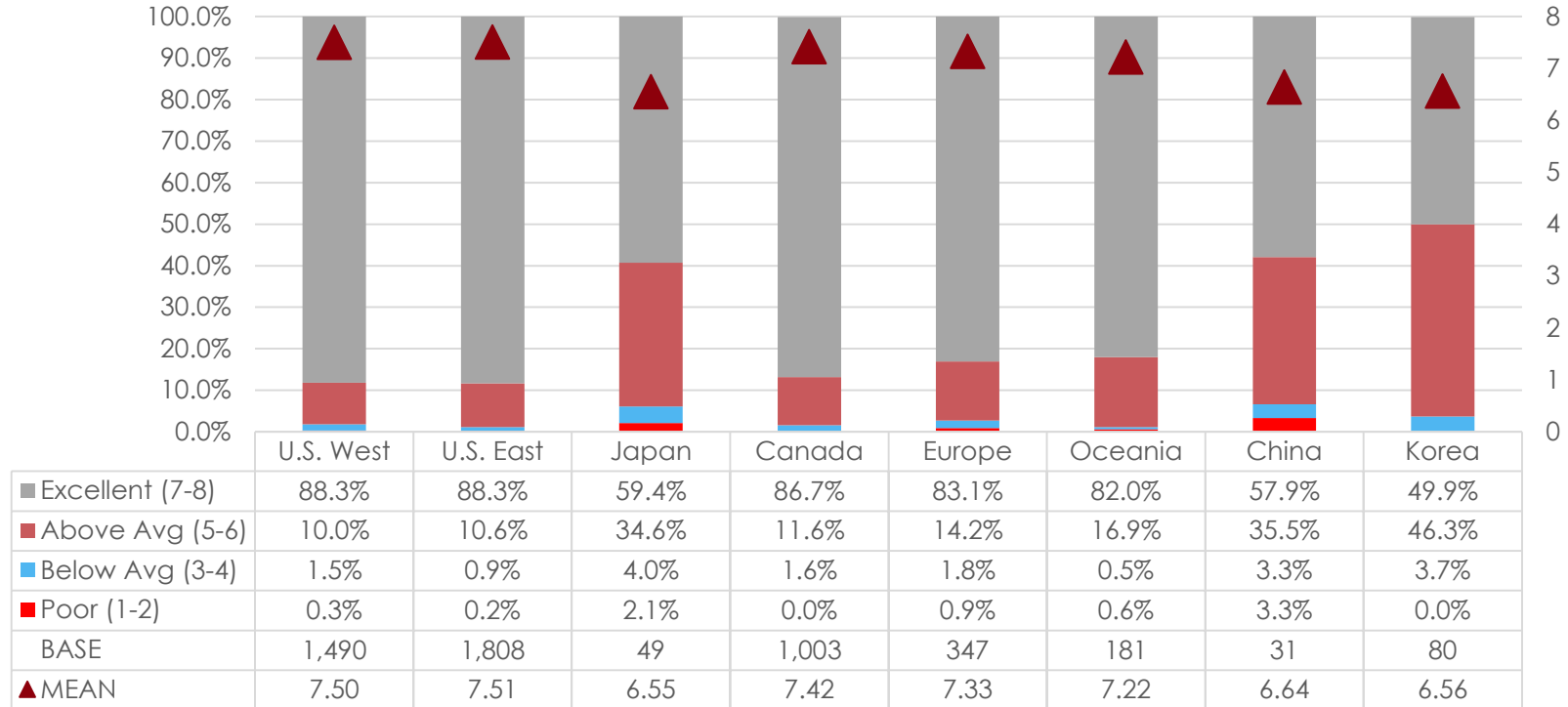
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

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



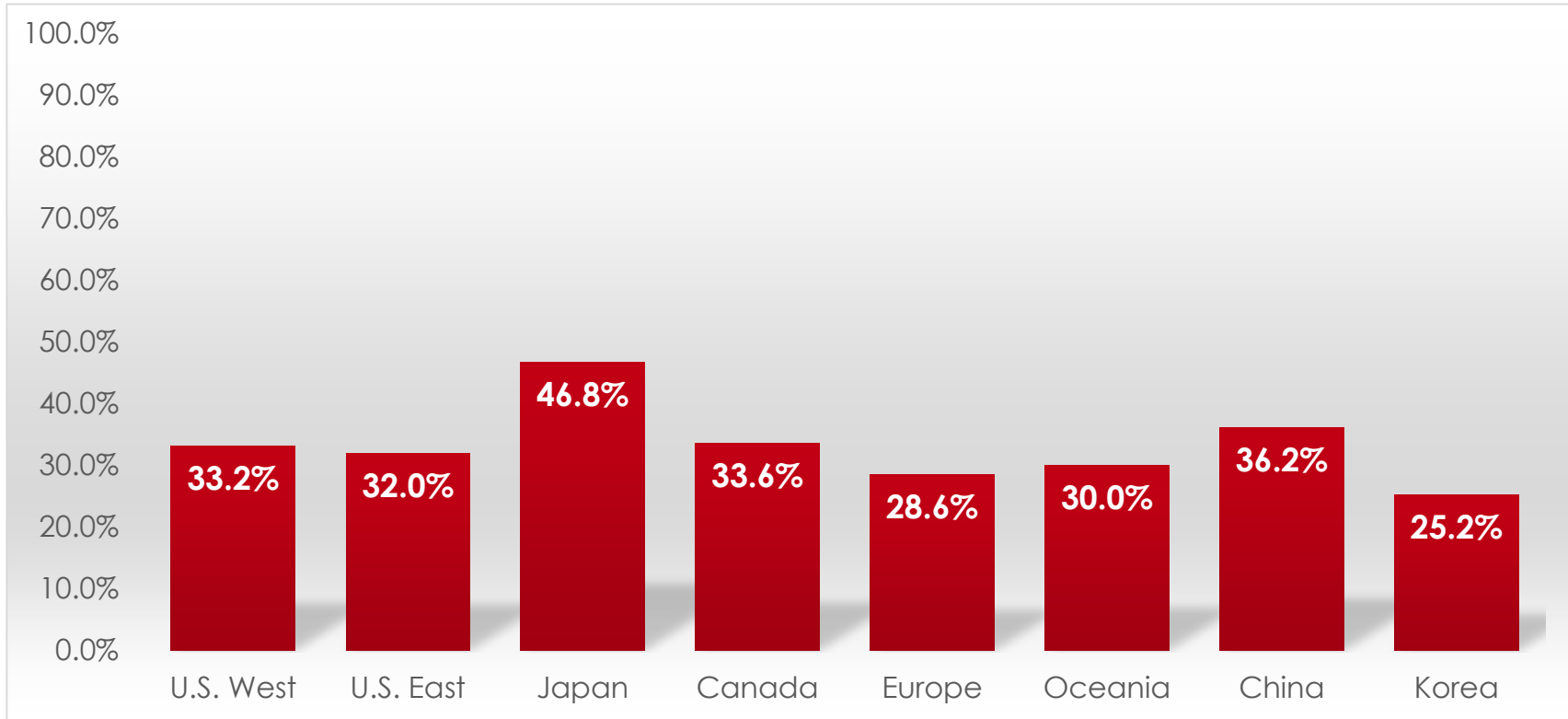
TOP INFLUENCERS – KAUA'I TRIP

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Friend recommendation | 36.0% | 35.6% | 26.2% | 41.1% | 30.5% | 28.3% | 55.0% | 28.8% |
| Been here before | 22.6% | 14.2% | 6.2% | 13.9% | 3.9% | 4.5% | 0.0% | 0.0% |
| Travel agent | 2.2% | 8.6% | 24.4% | 3.9% | 14.0% | 14.3% | 12.8% | 21.4% |
| Article/ blog | 3.0% | 6.4% | 16.5% | 7.6% | 19.5% | 8.2% | 22.5% | 26.1% |
| Cruise line stop | 1.9% | 8.4% | 2.1% | 4.4% | 5.0% | 15.6% | 0.0% | 0.0% |
| Visit friends/ family | 5.4% | 3.7% | 0.0% | 2.8% | 2.5% | 3.4% | 0.0% | 0.0% |
| Attending conference/ Event | 4.3% | 4.5% | 2.1% | 5.0% | 1.5% | 1.0% | 0.0% | 1.3% |
| Nature/ beauty | 4.3% | 4.1% | 0.0% | 4.4% | 2.4% | 2.9% | 0.0% | 1.3% |

Caution small base: Japan, China, and Korea less than 100 respondents

SECTION – MAUI

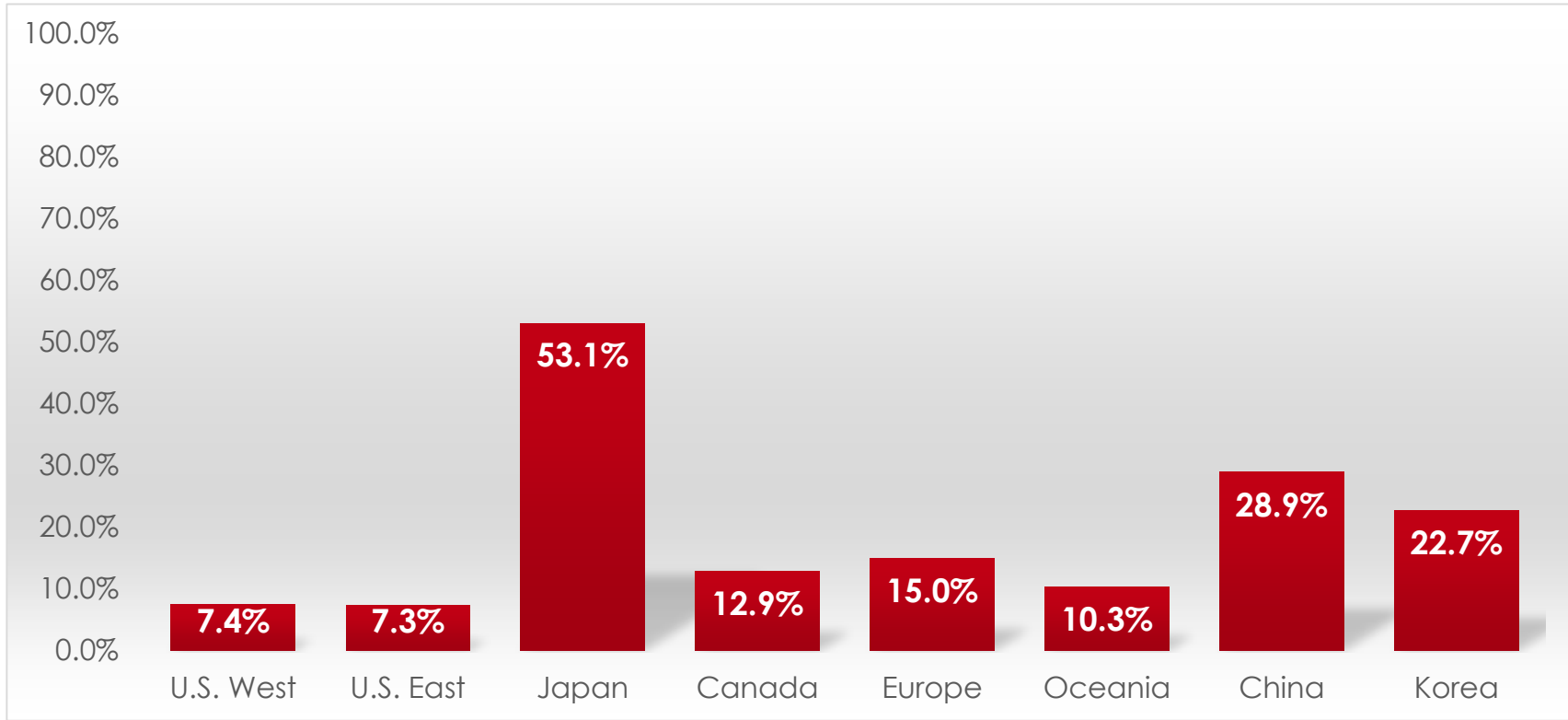
AIDED ADVERTISING AWARENESS – MAUI



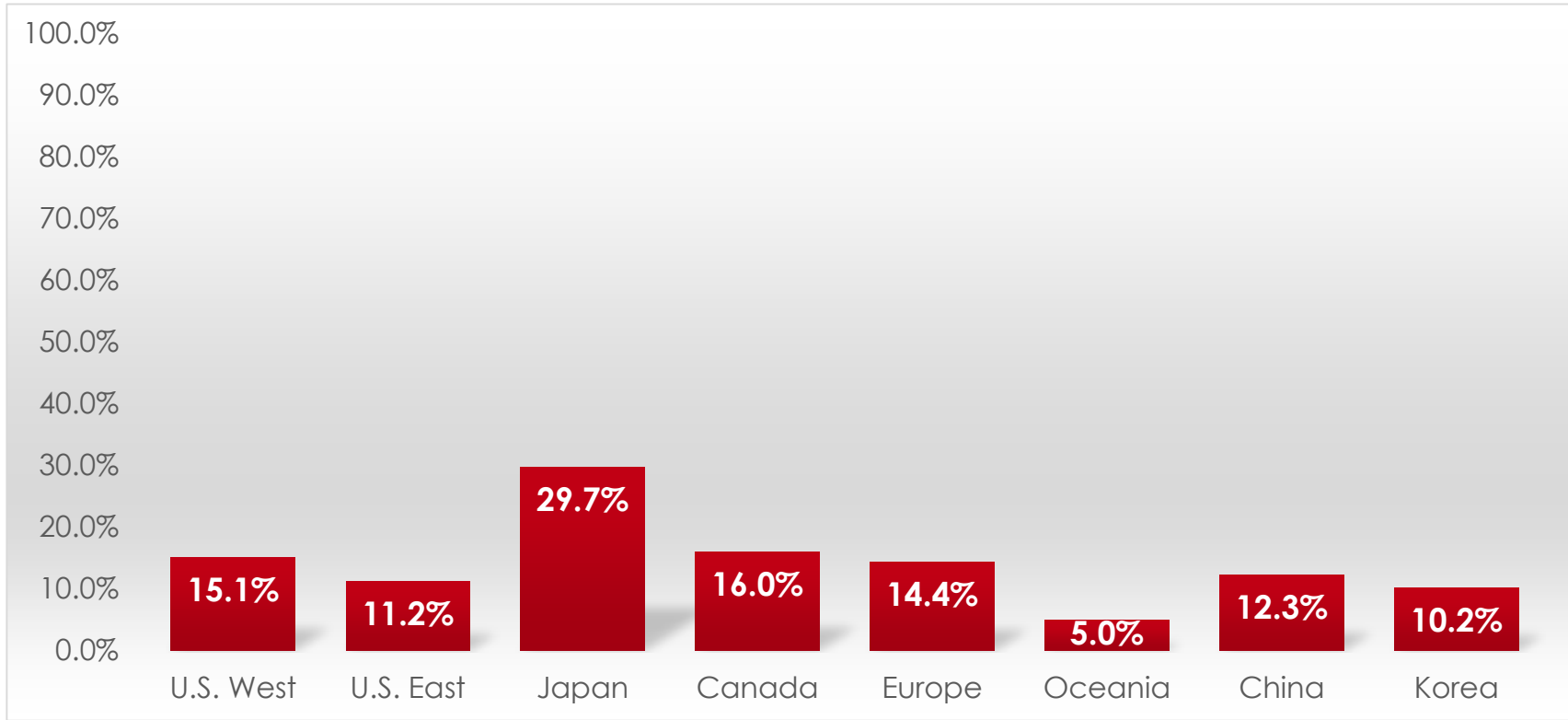
AIDED ADVERTISING AWARENESS – MAUI

- Among U.S. visitors, aided advertising awareness for Maui increases with age with younger segments of the sample the least likely to have been exposed to marketing for the island.
- Visitors without a college degree from the U.S. East and Oceania were more likely to be exposed to marketing than were more educated visitors from these MMAs.
- Among Canadian visitors, repeat visitors to Maui were more likely to have been exposed to advertising from Maui than were first-time visitors from this MMA.

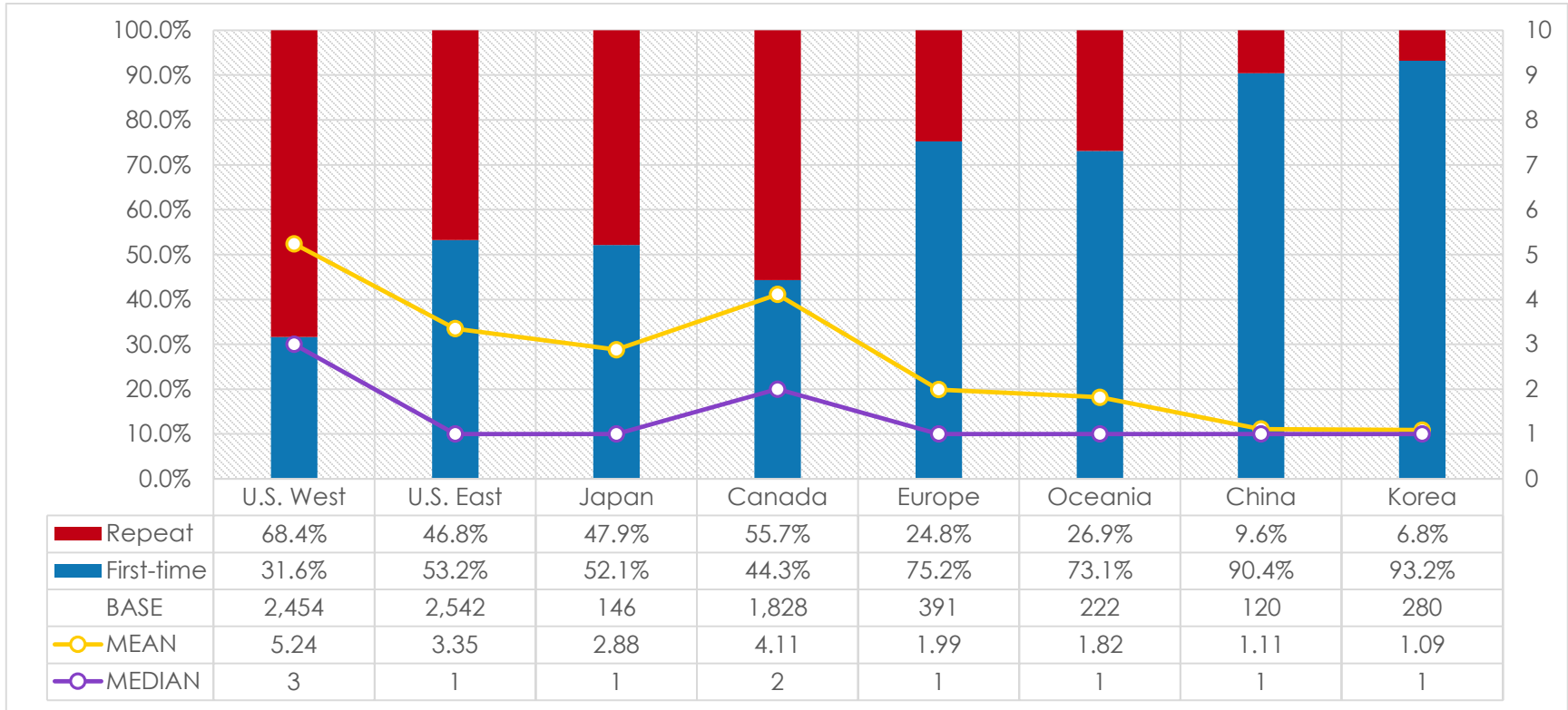
IMPACT OF LOCATION FILMING– MAUI



IMPACT OF HAWAIIAN MUSIC – MAUI



1ST TIME VS REPEAT VISITOR - MAUI



1ST TIME VS REPEAT VISITOR - MAUI

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among U.S. visitors, males have visited Maui more often on average than females.
- Among U.S. visitors more affluent visitors have come to Maui more often than less affluent travelers.

ACCOMMODATIONS - MAUI

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Hotel | 39.3% | 48.8% | 69.7% | 30.9% | 54.7% | 52.8% | 74.2% | 87.6% |
| Condominium | 38.2% | 28.8% | 17.3% | 51.6% | 20.7% | 22.1% | 9.2% | 1.1% |
| Timeshare | 21.1% | 15.1% | 3.4% | 10.4% | 2.5% | 4.8% | 3.3% | 0.7% |
| Rental house | 6.7% | 6.4% | 2.0% | 8.1% | 10.2% | 3.6% | 3.3% | 4.2% |
| Friend/ relative | 7.1% | 4.8% | 2.8% | 6.0% | 7.4% | 3.4% | .8% | 1.1% |
| Cruise ship | 1.1% | 3.6% | 0.0% | 1.4% | 1.8% | 8.5% | 0.0% | 0.0% |

STRENGTHS/ POSITIVE ASPECTS - MAUI

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-----------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Natural beauty | 17.4% | 29.0% | 29.3% | 26.4% | 32.3% | 21.5% | 42.7% | 47.3% |
| Beach/ ocean | 23.4% | 13.7% | 15.9% | 19.6% | 16.4% | 13.1% | 15.2% | 11.8% |
| Variety of activities | 16.5% | 20.5% | 18.0% | 14.4% | 14.3% | 17.5% | 23.6% | 19.5% |
| Aloha spirit | 10.9% | 10.1% | 3.5% | 12.5% | 16.6% | 9.2% | 2.5% | 2.5% |
| Customer service | 6.4% | 6.5% | 2.1% | 5.5% | 7.2% | 11.7% | .9% | 4.3% |
| Local culture | 5.5% | 5.1% | 4.8% | 4.8% | 3.1% | 4.7% | 2.5% | 3.2% |

STRENGTHS/ POSITIVE ASPECTS - MAUI

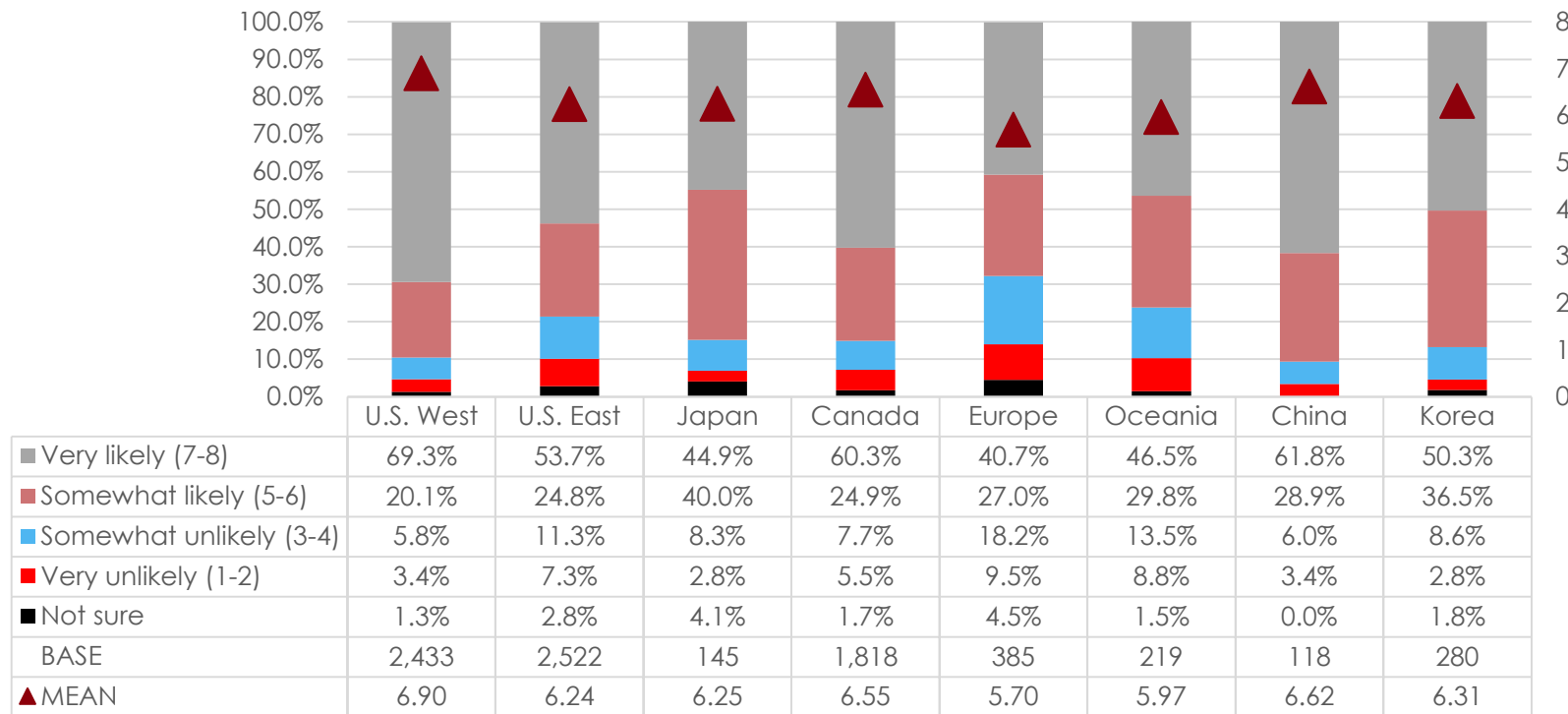
- Younger visitors from the U.S. were more likely to list Maui's natural beauty and the Aloha spirit as positive aspects of their trip than older visitors from the U.S.
- Male visitors from the U.S, more so than their female counterparts singled out the variety of activities on Maui as a positive aspect of their trip.

AREAS OF OPPORTUNITIES - MAUI

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Nothing | 40.4% | 45.0% | 33.2% | 41.9% | 47.2% | 56.4% | 36.3% | 27.2% |
| Traffic | 15.1% | 12.6% | 4.1% | 10.5% | 6.7% | 7.8% | 2.4% | 6.0% |
| Rental car | 7.6% | 6.8% | 4.1% | 8.4% | 3.1% | 2.6% | 5.1% | 9.7% |
| Not enough local culture | 7.5% | 6.4% | 7.6% | 7.5% | 5.2% | 5.5% | 10.3% | 11.4% |
| Driving experience | 6.9% | 6.6% | 11.0% | 5.1% | 5.1% | 2.5% | 3.3% | 3.5% |
| Cost/ expensive | 3.4% | 2.9% | 1.4% | 5.9% | 5.0% | 1.9% | .9% | 0.4% |

LIKELIHOOD OF RETURN VISIT – MAUI

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



LIKELIHOOD OF RETURN VISIT – MAUI

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

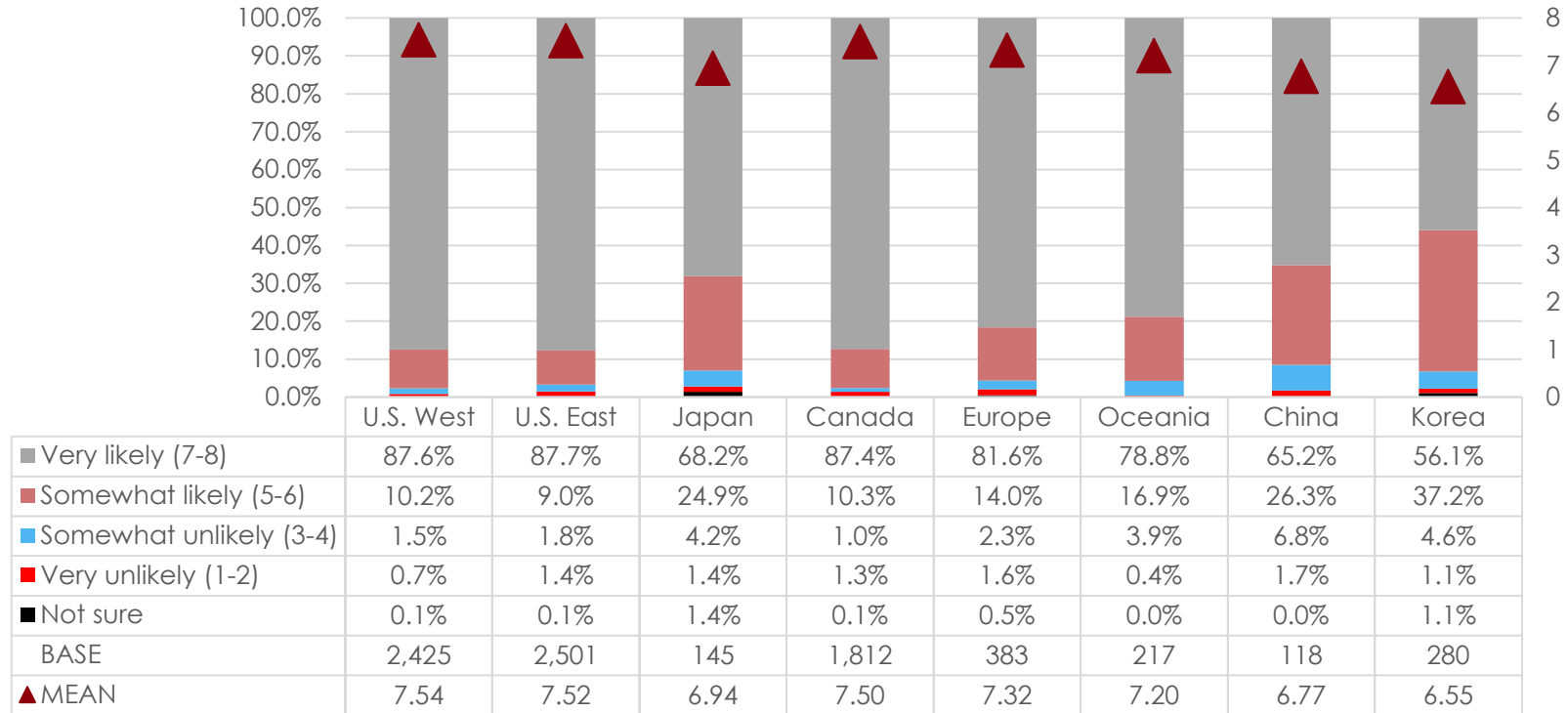
- Visitors from U.S. West without a college degree indicate a greater likelihood of revisiting Maui than do college graduates that hail from this MMA. This trend was also evident among Canadian visitors.
- Among visitors to Maui from U.S. West, more affluent visitors express a greater likelihood of returning to Maui than do less affluent visitors from this MMA.

REASONS FOR NOT RETURNING - MAUI

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Want to visit someplace new | 43.4% | 44.8% | 31.5% | 49.2% | 29.7% | 66.1% | 45.4% | 35.4% |
| Cost/ expensive | 32.3% | 40.0% | 18.2% | 45.4% | 39.1% | 28.7% | 27.6% | 24.3% |
| Flight is too long | 5.8% | 32.8% | 4.6% | 23.3% | 58.4% | 12.8% | 36.2% | 8.2% |
| Other financial obligations | 10.4% | 13.4% | 17.6% | 10.4% | 11.6% | 5.2% | 17.8% | 16.2% |
| No compelling reason to return | 13.1% | 8.4% | 18.2% | 10.7% | 8.2% | 14.1% | 8.7% | 18.8% |
| Not enough value | 11.8% | 8.5% | 0.0% | 14.2% | 8.3% | 9.7% | 9.2% | 19.0% |
| Too crowded/ congested | 14.7% | 7.2% | 0.0% | 8.9% | 2.3% | 0.0% | 0.0% | 0.0% |
| Too commercialized/ overdeveloped | 9.6% | 8.1% | 0.0% | 7.5% | 6.4% | 2.2% | 27.6% | 5.5% |
| Unfriendly people | 5.9% | 3.7% | 0.0% | 2.4% | 2.4% | 0.0% | 9.2% | 8.0% |

MAUI - BRAND/DESTINATION – ADVOCACY

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



MAUI - BRAND/DESTINATION – ADVOCACY

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Younger visitors from the U.S. were the stronger advocates for Maui than seniors.
- Female visitors to Maui from the U.S. were also stronger advocates for Maui than their male counterparts.

MAUI ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 95.9% | 96.3% | 93.7% | 97.2% | 95.5% | 93.3% | 94.0% | 97.2% |
| On own (self-guided) | 85.0% | 83.0% | 68.9% | 88.4% | 75.7% | 58.6% | 65.0% | 84.0% |
| Helicopter/ airplane | 3.9% | 7.7% | 3.4% | 5.4% | 9.5% | 7.7% | 5.1% | 2.9% |
| Boat/ submarine/ whale | 33.3% | 39.3% | 14.4% | 28.6% | 31.6% | 27.3% | 36.9% | 18.2% |
| Visit towns | 57.3% | 57.6% | 37.6% | 62.2% | 51.5% | 45.0% | 30.6% | 20.7% |
| Limo/ van/ bus tour | 5.4% | 13.1% | 15.1% | 7.4% | 14.0% | 17.7% | 8.6% | 8.2% |
| Scenic views/ natural landmark | 57.3% | 66.8% | 29.5% | 63.5% | 60.4% | 52.5% | 64.1% | 46.8% |
| Movie/ TV/ film location | 0.5% | 0.8% | 2.1% | 0.8% | 0.8% | 0.8% | 6.1% | 3.6% |

MAUI ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.9% | 96.9% | 94.5% | 98.5% | 97.6% | 91.5% | 94.9% | 95.7% |
| Beach/ sunbathing | 89.1% | 86.8% | 65.3% | 92.7% | 89.5% | 69.7% | 75.4% | 71.5% |
| Bodyboard/ Standup paddle board | 17.2% | 10.5% | 4.2% | 18.6% | 15.4% | 6.0% | 6.0% | 4.5% |
| Surfing | 6.8% | 6.9% | 3.5% | 11.6% | 13.2% | 4.1% | 5.2% | 6.0% |
| Canoeing/ kayak | 4.8% | 4.7% | 2.1% | 3.8% | 5.2% | 2.3% | 4.3% | 1.1% |
| Swim- ocean | 72.9% | 68.4% | 37.1% | 77.7% | 76.9% | 59.0% | 38.7% | 34.6% |
| Snorkel | 56.3% | 48.8% | 22.2% | 59.0% | 51.4% | 34.9% | 29.1% | 42.9% |
| Windsurf/ Kitesurf | 0.3% | 0.4% | 1.4% | 0.7% | 3.8% | 0.0% | 1.7% | 0.3% |
| Jet ski/ Parasail | 3.4% | 2.5% | 2.1% | 0.7% | 0.3% | 1.5% | 0.0% | 1.4% |
| Scuba | 3.8% | 3.5% | 1.4% | 4.0% | 4.2% | 3.0% | 2.6% | 2.5% |
| Fishing | 2.7% | 2.3% | 1.4% | 2.3% | 1.5% | 1.9% | 2.6% | 1.4% |
| Golf | 7.6% | 8.5% | 11.9% | 9.3% | 3.4% | 4.8% | 5.1% | 1.0% |

MAUI ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.9% | 96.9% | 94.5% | 98.5% | 97.6% | 91.5% | 94.9% | 95.7% |
| Run/ Jog/ Fitness walk | 32.6% | 29.2% | 12.4% | 33.1% | 19.6% | 22.2% | 17.9% | 6.1% |
| Spa | 12.6% | 11.9% | 2.8% | 7.8% | 5.8% | 8.3% | 2.6% | 6.8% |
| Hiking/Backpack/Camp | 27.4% | 29.7% | 4.1% | 28.2% | 22.5% | 10.4% | 13.6% | 17.1% |
| Agritourism | 11.2% | 13.1% | 14.3% | 8.2% | 7.0% | 4.1% | 15.4% | 6.0% |
| Sport event/ tournament | 1.6% | 1.6% | 5.6% | 2.2% | 1.8% | 0.5% | 0.9% | 1.4% |
| Park/ botanical garden | 32.3% | 36.9% | 23.9% | 36.4% | 35.4% | 25.4% | 34.1% | 17.8% |
| Waterpark | 0.9% | 0.9% | 0.0% | 1.1% | 1.8% | 0.0% | 8.6% | 3.9% |
| Mountain tube/ waterfall rappel | 1.1% | 0.8% | 0.7% | 0.5% | 4.2% | 0.4% | 2.6% | 2.5% |
| Zip-lining | 7.6% | 6.7% | 2.1% | 4.1% | 4.4% | 2.5% | 1.7% | 1.4% |
| Skydiving | 0.0% | 0.2% | 0.7% | 0.0% | 0.0% | 0.0% | 5.2% | 0.0% |
| All terrain vehicle (ATV) | 1.6% | 1.5% | 1.4% | 0.8% | 1.0% | 1.1% | 8.6% | 1.1% |
| Horseback riding | 1.7% | 1.6% | 6.8% | 0.8% | 1.8% | 0.9% | 4.3% | 0.4% |

MAUI ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 98.4% | 97.7% | 97.9% | 99.1% | 96.5% | 97.7% | 96.6% | 98.2% |
| Lunch/ sunset/ dinner/ evening cruise | 25.1% | 26.7% | 13.7% | 21.3% | 27.6% | 17.9% | 66.7% | 31.0% |
| Live music/ stage show | 32.4% | 36.3% | 16.4% | 30.9% | 28.2% | 22.8% | 23.1% | 8.6% |
| Nightclub/ dancing/ bar/ karaoke | 7.9% | 7.0% | 10.2% | 6.6% | 4.8% | 5.5% | 8.5% | 2.9% |
| Fine dining | 59.9% | 61.1% | 43.9% | 52.1% | 45.8% | 37.9% | 48.5% | 45.7% |
| Family restaurant | 62.4% | 55.8% | 19.4% | 63.8% | 48.9% | 55.7% | 12.6% | 32.4% |
| Fast food | 32.5% | 28.6% | 33.2% | 40.9% | 36.4% | 30.4% | 35.2% | 34.7% |
| Food truck | 24.3% | 23.6% | 9.0% | 33.3% | 18.6% | 17.2% | 11.9% | 24.6% |
| Café/ coffee house | 44.6% | 39.3% | 40.6% | 48.8% | 45.5% | 53.7% | 33.3% | 37.5% |
| Ethnic dining | 27.3% | 26.9% | 13.7% | 23.7% | 15.9% | 6.5% | 15.4% | 26.1% |
| Prepared own meal | 59.6% | 42.4% | 19.5% | 72.3% | 40.5% | 32.0% | 20.4% | 8.1% |

MAUI ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.8% | 95.9% | 97.2% | 97.9% | 95.8% | 93.0% | 93.2% | 94.6% |
| Mall/ department store | 44.7% | 39.9% | 62.0% | 56.6% | 54.3% | 41.8% | 40.1% | 46.4% |
| Designer boutique | 20.7% | 19.5% | 9.7% | 19.3% | 16.5% | 16.2% | 4.3% | 2.9% |
| Hotel/ resort store | 34.5% | 41.5% | 28.7% | 24.2% | 28.1% | 26.5% | 25.7% | 17.9% |
| Swap meet/ flea market | 15.6% | 12.3% | 5.5% | 19.2% | 4.8% | 2.3% | 1.7% | 2.8% |
| Discount/ outlet store | 21.6% | 18.4% | 16.6% | 27.7% | 20.6% | 31.6% | 38.6% | 51.2% |
| Supermarket | 72.2% | 61.2% | 50.4% | 77.2% | 69.2% | 57.6% | 56.5% | 45.0% |
| Farmer's market | 32.6% | 24.6% | 6.2% | 39.2% | 19.2% | 14.0% | 15.3% | 7.1% |
| Convenience store | 46.2% | 43.3% | 24.9% | 50.8% | 26.6% | 42.2% | 38.5% | 26.0% |
| Duty free store | 3.6% | 3.5% | 27.2% | 6.8% | 4.2% | 3.7% | 30.9% | 13.6% |
| Local shop/ artisan | 68.0% | 67.4% | 12.4% | 68.3% | 57.0% | 59.2% | 25.6% | 13.2% |

MAUI ACTIVITIES – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 66.0% | 69.5% | 61.7% | 65.8% | 62.0% | 58.9% | 76.1% | 49.8% |
| Historic military site | 3.3% | 4.9% | 18.4% | 2.9% | 3.4% | 4.6% | 24.8% | 7.2% |
| Other historical site | 21.4% | 22.4% | 27.4% | 19.5% | 21.2% | 21.3% | 25.5% | 25.3% |
| Museum/ art gallery | 20.5% | 16.3% | 8.2% | 18.4% | 15.4% | 17.1% | 8.5% | 5.7% |
| Luau/ Polynesian show/ hula show | 31.8% | 40.8% | 6.2% | 33.0% | 32.4% | 25.3% | 18.0% | 10.3% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.1% | 6.8% | 2.8% | 6.8% | 6.5% | 5.5% | 7.8% | 3.2% |
| Play/ concert/ theatre | 4.3% | 4.5% | 2.0% | 5.2% | 3.5% | 3.8% | 0.9% | 2.1% |
| Art/ craft fair | 16.6% | 15.0% | 5.5% | 14.8% | 8.3% | 8.5% | 13.5% | 5.3% |
| Festival event | 3.1% | 2.9% | 7.0% | 3.5% | 3.1% | 3.0% | 3.4% | 0.4% |

MAUI ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 93.9% | 95.3% | 95.8% | 96.5% | 95.1% | 93.7% | 92.4% | 96.8% |
| Airport shuttle | 15.5% | 17.2% | 12.4% | 17.7% | 22.0% | 34.0% | 19.8% | 6.1% |
| Trolley | 1.7% | 1.7% | 8.3% | 1.9% | 2.9% | 5.1% | 5.2% | 3.2% |
| Public bus | 1.9% | 2.3% | 11.0% | 4.8% | 9.3% | 11.1% | 3.5% | 1.8% |
| Tour bus/ tour van | 6.0% | 13.2% | 26.7% | 8.3% | 12.5% | 21.4% | 18.0% | 12.9% |
| Taxi/ limo | 5.3% | 8.4% | 23.6% | 7.8% | 16.4% | 20.1% | 13.6% | 6.4% |
| Rental car | 86.8% | 83.3% | 60.1% | 89.2% | 73.9% | 50.7% | 65.0% | 80.8% |
| Ride share | 8.9% | 10.3% | 1.4% | 6.5% | 7.6% | 11.6% | 6.0% | 2.8% |
| Bicycle rental | 1.8% | 1.7% | 1.4% | 2.1% | 1.3% | 1.4% | 0.0% | 0.4% |

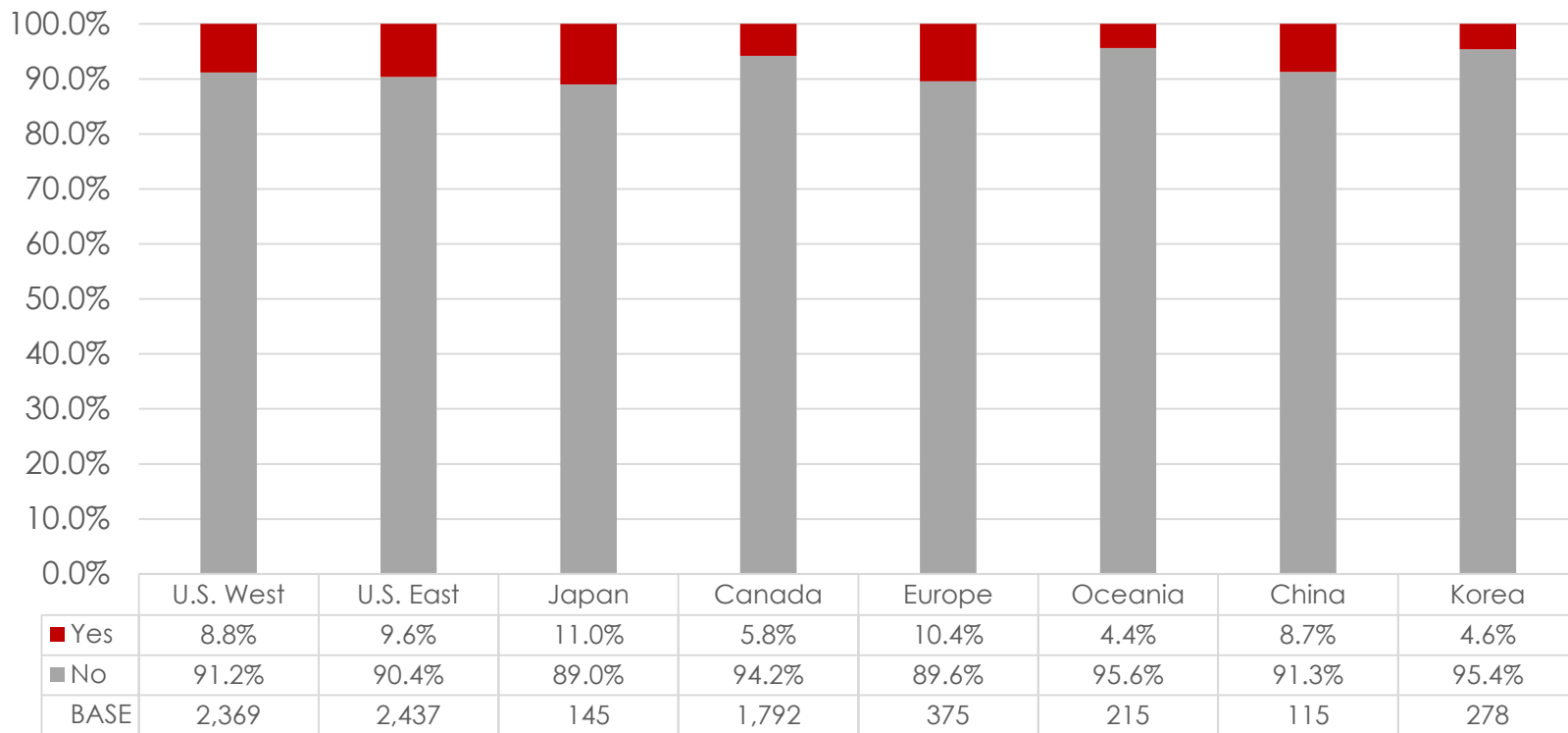
MAUI ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 22.3% | 15.3% | 12.4% | 18.7% | 12.8% | 9.9% | 10.2% | 11.3% |
| Visit friends/ family | 21.9% | 14.8% | 11.7% | 17.8% | 9.9% | 8.9% | 5.9% | 9.5% |
| Volunteer- non-profit | 0.7% | 0.8% | 0.7% | 1.0% | 3.1% | 0.9% | 4.3% | 1.8% |

ATTRACTIONS – MAUI

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Alexander & Baldwin Sugar Museum | 3.9% | 3.2% | 3.4% | 3.9% | 2.7% | 2.0% | 4.3% | 3.9% |
| Aquarium Maui /Maui Ocean Center | 20.1% | 18.4% | 10.3% | 21.6% | 14.2% | 8.1% | 23.9% | 7.1% |
| Baldwin Missionary Home Museum | 5.5% | 4.1% | 2.0% | 4.6% | 5.2% | 6.4% | 3.4% | 2.5% |
| Hale Pa'i Printing House | 0.3% | 0.3% | 2.7% | 0.7% | 0.3% | 0.4% | 0.8% | 2.5% |
| Haleakala National Park | 30.1% | 44.1% | 35.5% | 44.0% | 50.9% | 33.1% | 51.3% | 61.2% |
| Haleki'i-Pihana Heiau State Monument | 2.5% | 3.2% | 8.1% | 3.0% | 4.2% | 3.9% | 4.2% | 3.2% |
| Hana Cultural Center | 9.5% | 12.7% | 4.1% | 12.5% | 16.9% | 16.3% | 30.9% | 3.5% |
| 'Iao Valley State Monument | 16.3% | 14.6% | 23.3% | 17.2% | 18.5% | 8.0% | 4.2% | 5.0% |
| Kula Botanical Garden | 8.0% | 6.7% | 17.7% | 10.2% | 10.0% | 8.7% | 11.8% | 6.8% |
| Maui Historical Society Bailey House Museum | 3.6% | 3.0% | 5.4% | 2.9% | 2.1% | 4.9% | 6.9% | 3.6% |
| Whaler's Village Museum | 16.2% | 15.5% | 7.0% | 13.9% | 14.6% | 13.9% | 18.9% | 3.9% |
| Wo Hing Temple Museum | 2.6% | 2.3% | 0.0% | 3.7% | 2.8% | 5.4% | 11.0% | 1.1% |

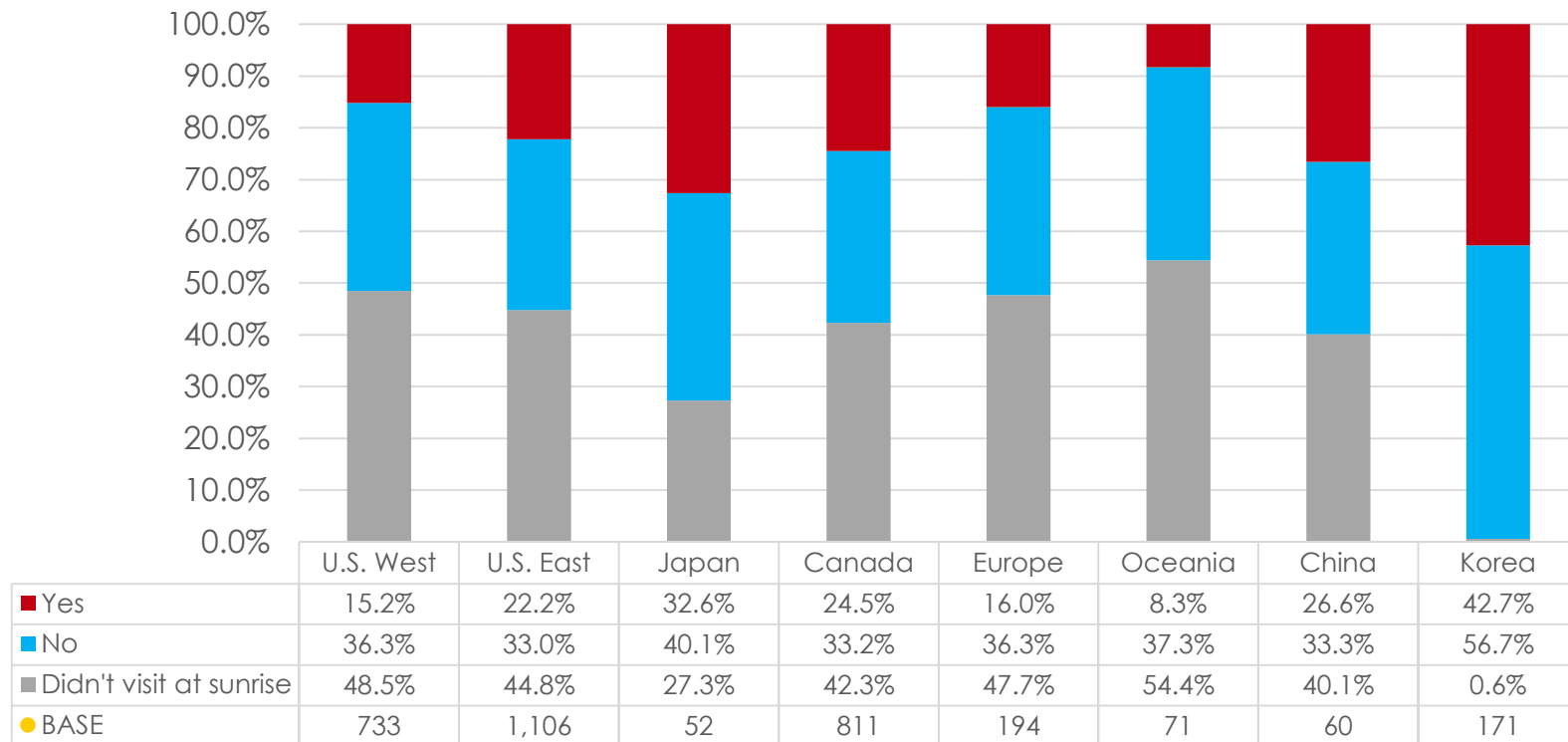
VISITED MAUI FOR SPECIFIC EVENT



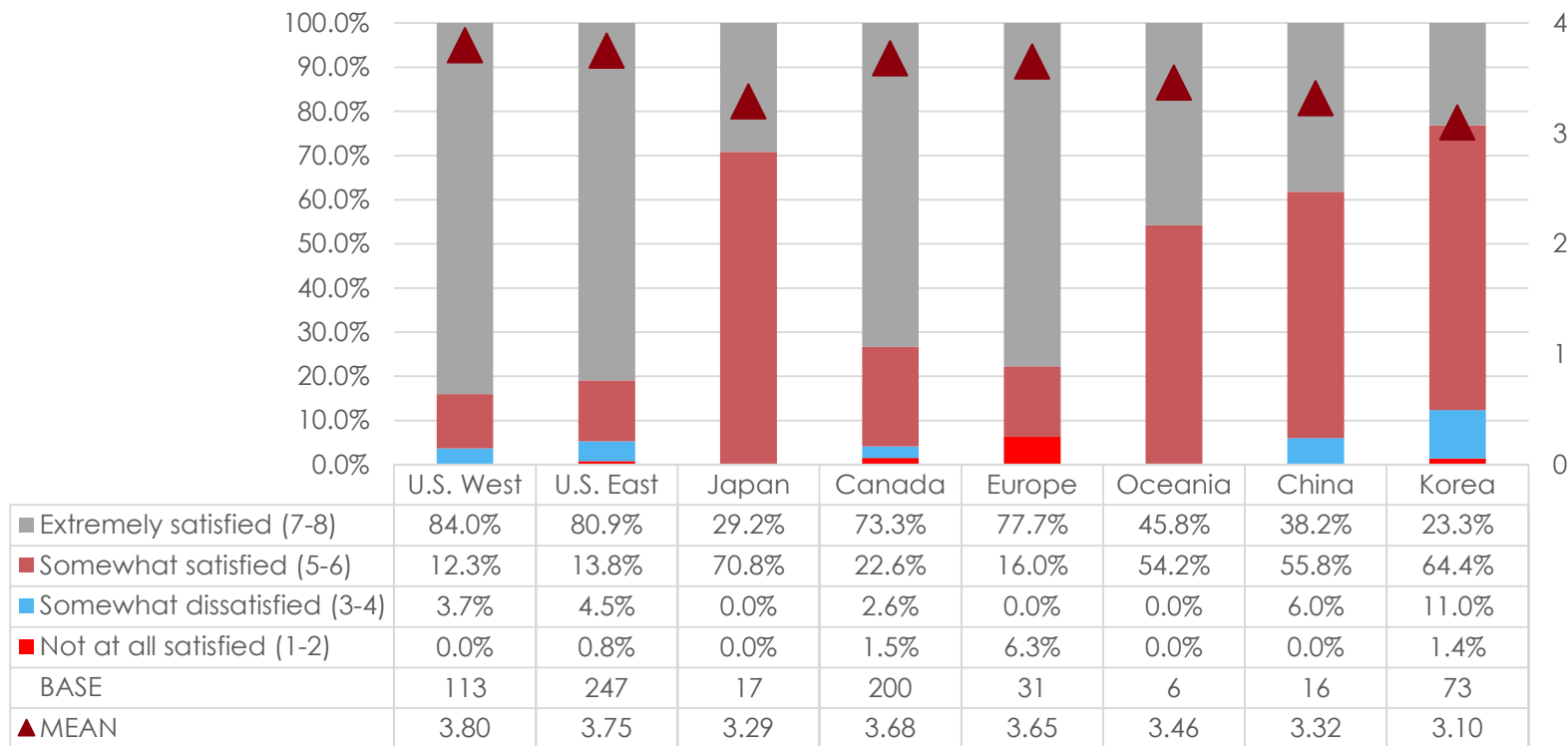
VISITED MAUI FOR SPECIFIC EVENT

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Wedding/ honeymoon, anniversary/ birthday/ funeral | 46.4% | 27.3% | 0.0% | 41.8% | 18.7% | 56.1% | 0.0% | 7.4% |
| Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training | 31.6% | 46.0% | 24.2% | 24.6% | 23.5% | 0.0% | 20.3% | 23.3% |
| Other Festival/ concert | 2.9% | 3.4% | 12.7% | 3.9% | 2.8% | 9.6% | 0.0% | 0.0% |
| Sentry Tournament of Golf Champions | 3.4% | 3.5% | 0.0% | 2.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| Hawaii Food & Wine Festival | 1.9% | 2.1% | 12.7% | 5.5% | 15.9% | 0.0% | 19.2% | 23.3% |
| Maui Marathon | 0.4% | 3.9% | 12.7% | 4.1% | 5.2% | 0.0% | 10.2% | 7.4% |

HALEAKALA NATIONAL PARK RESERVATION SYSTEM



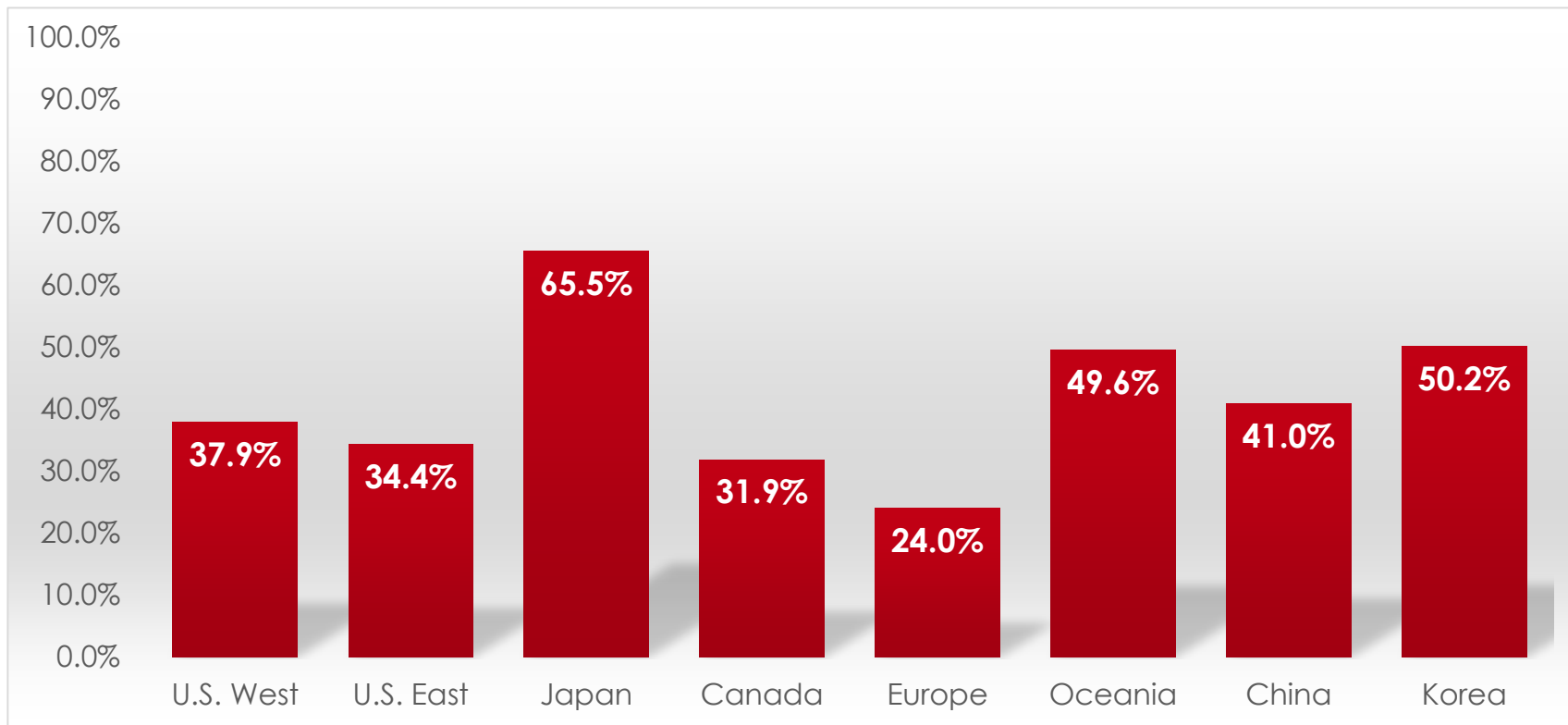
HALEAKALA NATIONAL PARK RESERVATION SYSTEM



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

SECTION – ISLAND OF HAWAI‘I

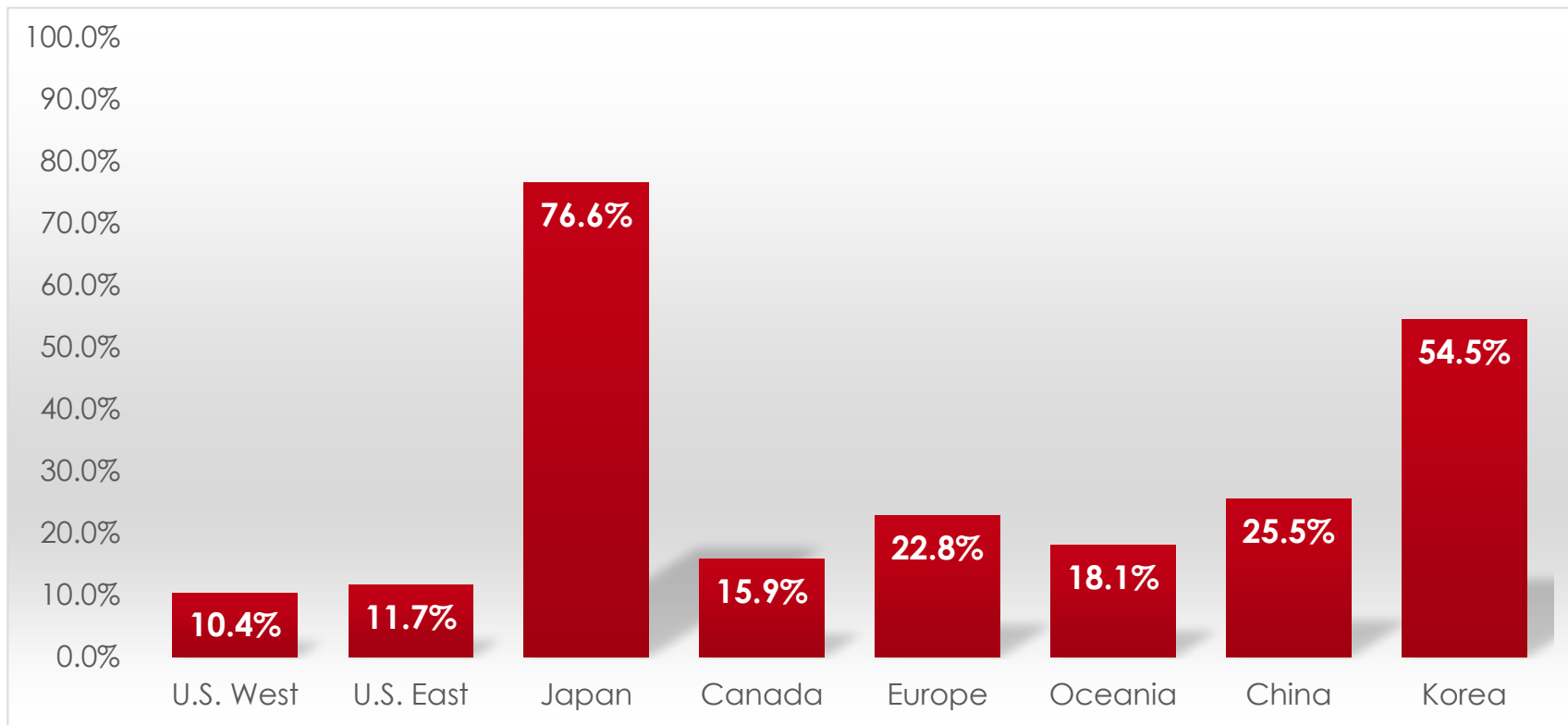
AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I



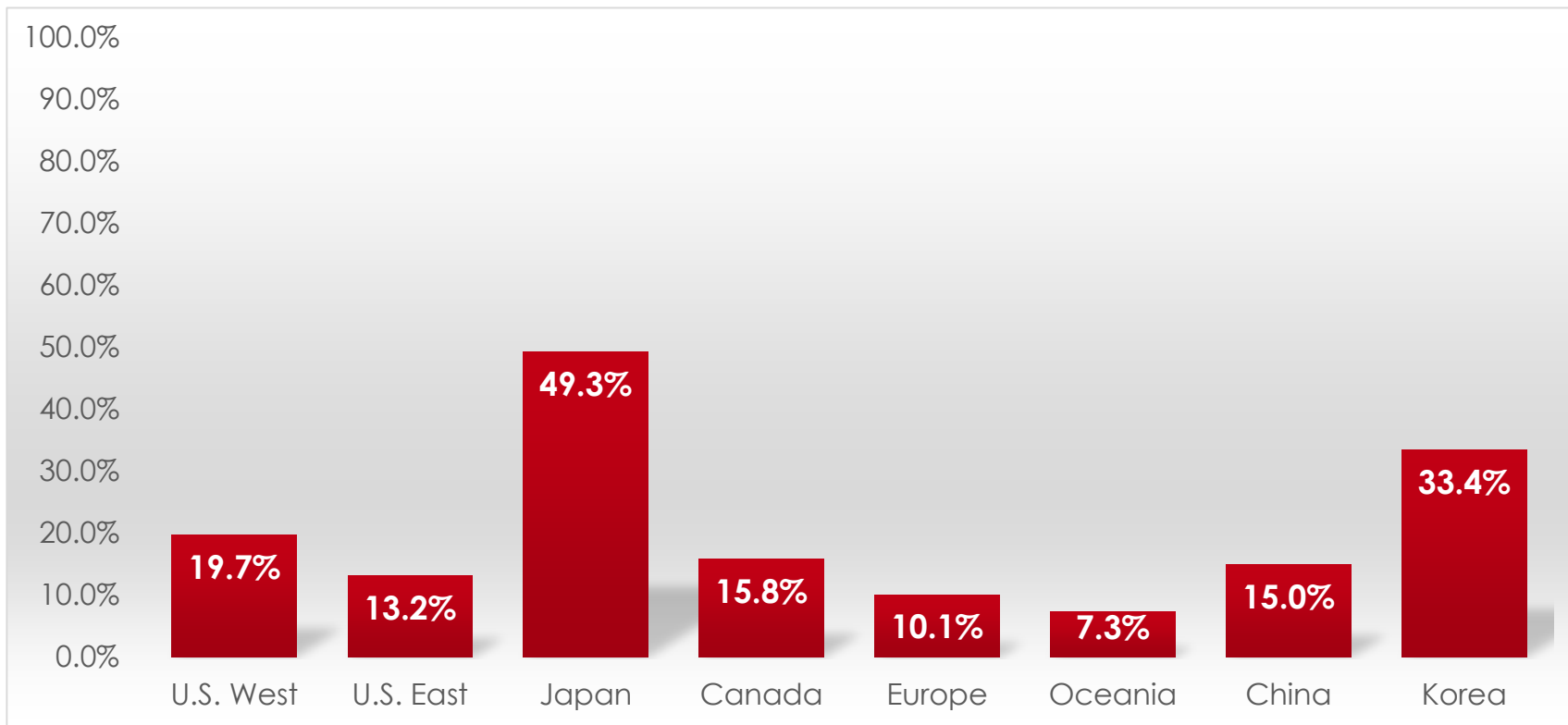
AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I

- Younger visitors to the Island of Hawai'i or those under the age of 35 were the least likely to be exposed to marketing for the destination.
- Similar to the U.S., visitors to the Island of Hawai'i from Japan under the age of 35 were also the least likely to have been exposed to any marketing for the island.
- Repeat visitors to the Island of Hawai'i from U.S. West, U.S. East, and Japan were more likely to be exposed to marketing for the island than were first-time visitors from these MMAs.
- Among visitors from U.S. West, more affluent travelers were more likely to be exposed to marketing regarding the Island of Hawai'i.
- Less educated visitors from Japan were more likely to be exposed to marketing than were those with a college degree.

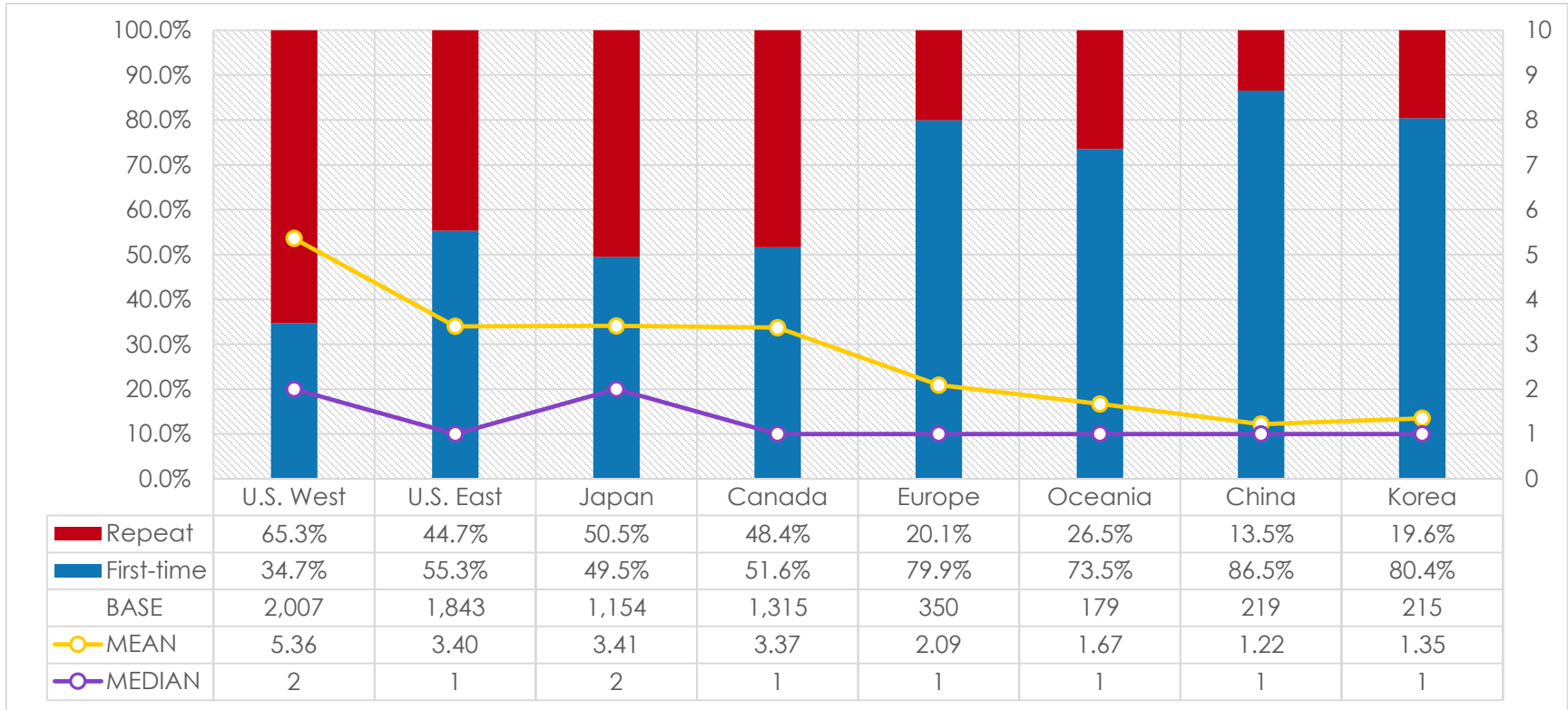
IMPACT OF LOCATION FILMING— ISLAND OF HAWAI'I



IMPACT OF HAWAIIAN MUSIC – ISLAND OF HAWAI‘I



1ST TIME VS REPEAT VISITOR – ISLAND OF HAWAI'I



1ST TIME VS REPEAT VISITOR – ISLAND OF HAWAI'I

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- The average number of visits increase with age with the highest mean average present among seniors in the following MMAs: U.S. West, U.S. East, Canada, Japan, and Europe.
- Females from both U.S. West, and U.S. East were more likely to be first-time visitors to the Island of Hawai'i than were their male counterparts.
- Among U.S. visitors, those in larger travel parties were more likely to be first-time visitors to the Island of Hawai'i.
- When segmented by household income we find more affluent visitors from U.S. West and Canada to the Island of Hawai'i were more likely to be repeat visitors.

ACCOMMODATIONS – ISLAND OF HAWAI'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|----------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Hotel | 37.9% | 45.1% | 61.9% | 31.0% | 61.5% | 58.8% | 77.7% | 89.4% |
| Condominium | 24.7% | 16.5% | 20.2% | 30.3% | 13.9% | 16.7% | 5.0% | 1.4% |
| Timeshare | 19.7% | 16.7% | 14.4% | 14.8% | 4.7% | 6.8% | .9% | 3.2% |
| Rental house | 18.7% | 16.5% | 0.9% | 27.9% | 17.1% | 9.2% | 3.1% | 7.9% |
| Friend/ relative | 14.3% | 10.0% | 2.5% | 7.8% | 6.2% | 2.0% | 3.6% | 2.3% |
| Bed & Breakfast | 3.1% | 4.1% | 0.8% | 4.4% | 8.6% | 2.4% | 15.6% | 0.9% |

STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-----------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Natural beauty | 25.4% | 31.7% | 41.9% | 28.2% | 41.5% | 27.2% | 47.8% | 26.1% |
| Variety of activities | 17.7% | 24.4% | 20.2% | 20.0% | 18.0% | 31.0% | 21.1% | 32.6% |
| Beach/ ocean | 15.7% | 9.4% | 13.9% | 14.9% | 7.5% | 3.8% | 6.4% | 14.4% |
| Aloha spirit | 10.7% | 9.0% | 2.5% | 11.0% | 14.6% | 11.4% | 5.0% | 3.7% |
| Local culture | 7.4% | 5.5% | 3.5% | 4.6% | 4.7% | 4.6% | 5.1% | 0.9% |
| Customer service | 5.5% | 5.5% | 2.0% | 5.9% | 5.2% | 6.2% | 2.7% | 6.1% |

STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI‘I

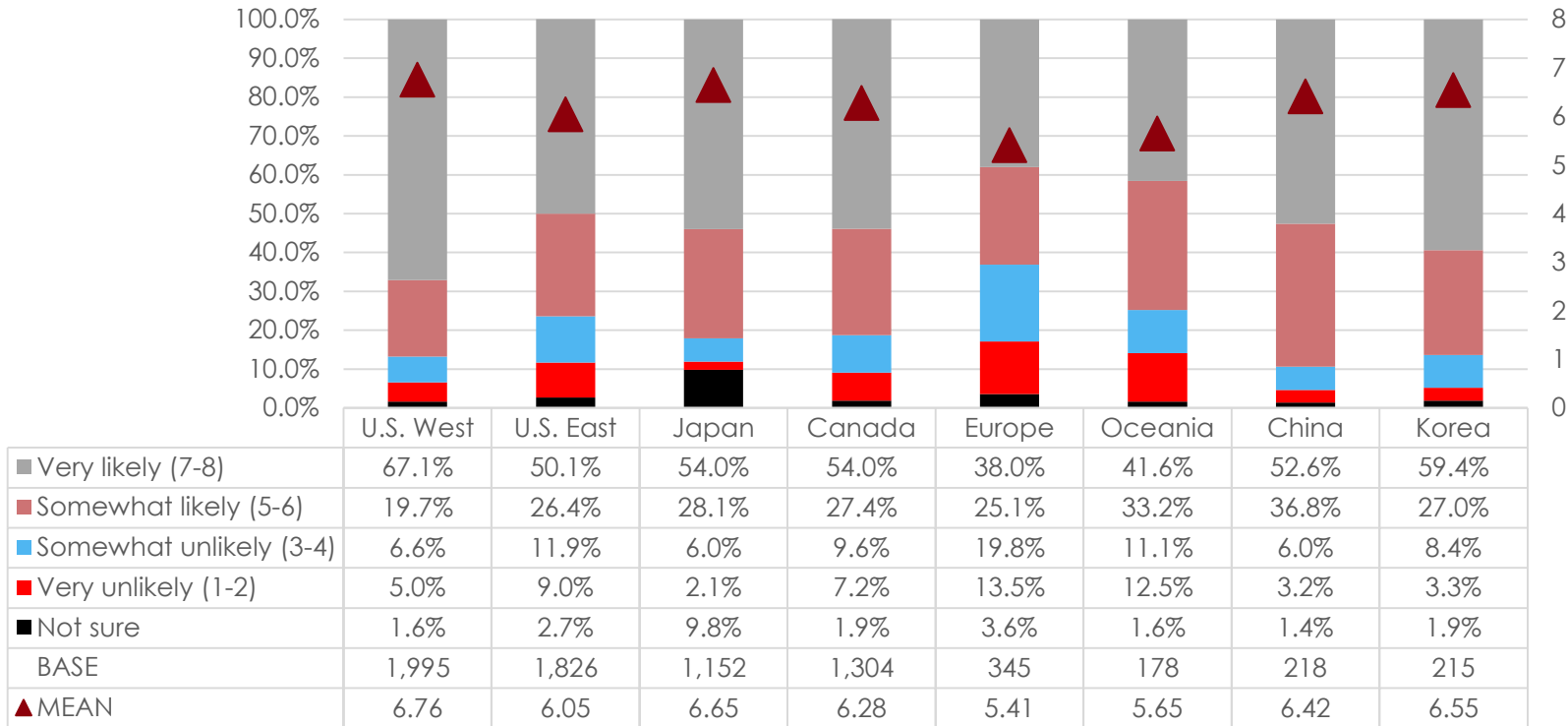
- Among visitors from U.S. West we find younger travelers more likely to single out the beach as a positive aspect of their trip while seniors were more satisfied with the variety of activities.
- More educated travelers from the U.S. were more likely to be impressed with the natural beauty they encountered on the island more so than those visitors without a college degree.
- First-time visitors to the Island of Hawai‘i were more likely to cite the natural beauty they encountered as a positive aspect of their trip more so than repeat visitors from the following MMAs: U.S. West, U.S. East, Canada, and Japan.
- Repeat visitors to the Island of Hawai‘i from U.S. West and U.S. East were more likely to mention the Aloha Spirit and being exposed to local culture as positive aspects of their trip than were first-time visitors from these MMAs.

AREAS OF OPPORTUNITIES – ISLAND OF HAWAI‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Nothing | 40.2% | 46.4% | 32.3% | 38.7% | 45.2% | 57.3% | 40.8% | 28.0% |
| Traffic | 11.8% | 9.2% | 2.2% | 14.1% | 2.9% | 2.1% | 1.4% | 4.6% |
| Not enough local culture | 6.9% | 7.4% | 4.1% | 7.4% | 4.7% | 6.8% | 10.6% | 12.2% |
| Ground transportation | 2.8% | 2.9% | 22.4% | 3.5% | 6.7% | 2.6% | 6.9% | 3.7% |
| Food- variety | 4.6% | 5.0% | 9.1% | 3.4% | 6.7% | 5.6% | 9.1% | 7.4% |
| Driving experience | 5.9% | 5.2% | 1.7% | 6.4% | 2.3% | 3.3% | 1.4% | 2.4% |
| Rental car | 4.6% | 3.7% | 2.7% | 5.2% | 2.8% | 2.8% | 2.8% | 2.8% |

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

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

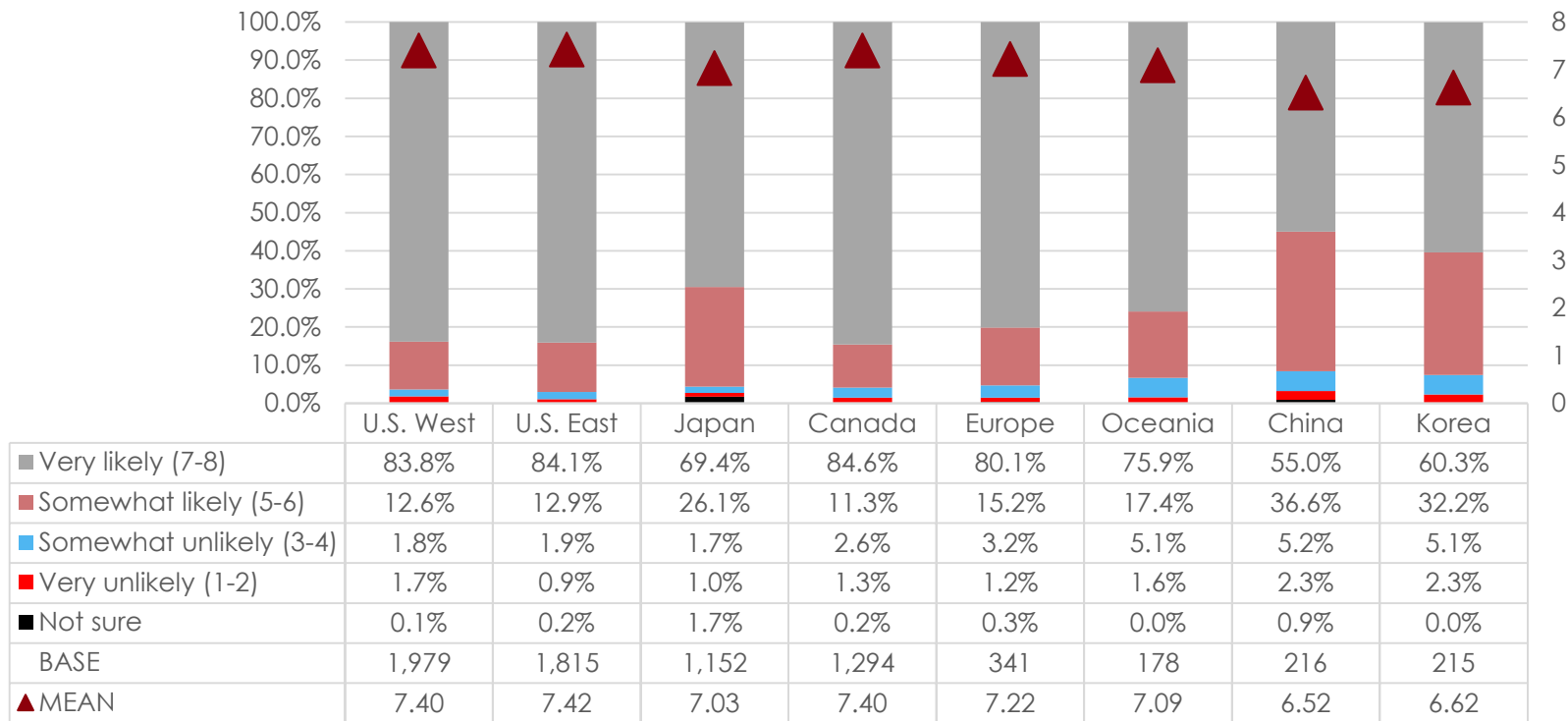
- Among Japanese visitors the likelihood of return increases with age. Japanese visitors under the age of 35 were the least likely to indicate a return to Hawai‘i island in the next five years.
- Females from U.S. West are more likely to return in five years than their male counterparts.
- Those from U.S. West who are traveling by themselves are the most likely to return to Hawai‘i Island within the next five years.

REASONS FOR NOT RETURNING – ISLAND OF HAWAI‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Want to visit someplace new | 52.5% | 52.0% | 48.9% | 60.2% | 42.6% | 55.1% | 41.0% | 20.7% |
| Cost/ expensive | 26.3% | 37.0% | 19.6% | 27.2% | 47.6% | 6.5% | 27.5% | 27.4% |
| Flight is too long | 8.1% | 27.9% | 8.1% | 16.6% | 59.2% | 7.6% | 4.6% | 34.4% |
| No compelling reason to return | 17.8% | 8.0% | 8.8% | 13.8% | 8.0% | 28.5% | 31.5% | 20.7% |
| Other financial obligations | 10.5% | 13.7% | 16.9% | 9.9% | 16.2% | 11.0% | 0.0% | 20.5% |
| Not enough value | 11.3% | 6.0% | 3.4% | 8.6% | 8.0% | 10.1% | 13.5% | 27.6% |
| Poor health/ old age | 5.6% | 4.7% | 8.8% | 3.0% | 0.7% | 6.5% | 4.6% | 0.0% |

ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

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



ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among visitors from U.S. West, females were more likely to recommend the Island of Hawai'i than were males from this MMA.
- Repeat visitors to the Island of Hawaii were stronger advocates for visiting this destination than were first-time visitors from the following MMAs: U.S. West, U.S. East, Canada, and Japan.

ISLAND OF HAWAI'I - ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.6% | 96.1% | 96.5% | 96.7% | 95.7% | 95.4% | 98.1% | 95.7% |
| On own (self-guided) | 87.8% | 83.2% | 68.0% | 88.4% | 79.9% | 64.3% | 53.2% | 75.2% |
| Helicopter/ airplane | 7.2% | 14.9% | 3.7% | 10.3% | 16.3% | 25.5% | 57.4% | 14.9% |
| Boat/ submarine/ whale | 23.9% | 26.5% | 5.8% | 23.0% | 26.1% | 23.1% | 16.4% | 16.9% |
| Visit towns | 59.5% | 58.7% | 28.3% | 62.1% | 49.0% | 45.7% | 29.9% | 36.0% |
| Limo/ van/ bus tour | 6.8% | 14.9% | 25.2% | 7.6% | 16.6% | 27.5% | 21.0% | 14.0% |
| Scenic views/ natural landmark | 63.5% | 72.5% | 30.4% | 70.2% | 67.2% | 57.3% | 15.9% | 47.3% |
| Movie/ TV/ film location | 1.2% | 2.1% | 2.0% | 1.3% | 2.4% | 5.5% | 75.6% | 15.0% |

ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.6% | 96.2% | 95.2% | 98.2% | 95.7% | 92.8% | 95.8% | 96.7% |
| Beach/ sunbathing | 80.8% | 78.2% | 57.9% | 87.9% | 81.0% | 62.4% | 65.2% | 68.6% |
| Bodyboard/ Standup paddle board | 15.5% | 10.6% | 3.6% | 18.0% | 10.3% | 3.9% | 3.7% | 8.4% |
| Surfing | 3.5% | 3.1% | 1.1% | 6.9% | 6.3% | 5.1% | 5.6% | 15.1% |
| Canoeing/ kayak | 8.8% | 7.5% | 2.8% | 7.8% | 7.6% | 5.3% | 2.3% | 5.2% |
| Swim- ocean | 66.0% | 62.3% | 27.7% | 76.2% | 64.9% | 56.3% | 35.9% | 44.4% |
| Snorkel | 54.8% | 50.1% | 21.0% | 61.8% | 53.0% | 38.6% | 22.5% | 45.0% |
| Windsurf/ Kitesurf | 0.2% | 0.2% | 0.1% | 0.2% | 0.3% | 1.1% | 1.8% | 0.9% |
| Jet ski/ Parasail | 1.9% | 1.0% | 0.2% | 0.8% | 0.6% | 1.1% | 1.4% | 4.7% |
| Scuba | 3.6% | 4.2% | 2.3% | 4.9% | 6.1% | 1.1% | 1.9% | 1.8% |
| Fishing | 4.7% | 4.4% | 1.5% | 3.1% | 1.4% | 1.1% | 5.0% | 0.5% |
| Golf | 8.3% | 7.4% | 14.1% | 8.1% | 2.9% | 5.1% | 4.1% | 0.9% |

ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 96.6% | 96.2% | 95.2% | 98.2% | 95.7% | 92.8% | 95.8% | 96.7% |
| Run/ Jog/ Fitness walk | 26.6% | 23.7% | 14.0% | 30.4% | 17.5% | 15.3% | 15.8% | 8.5% |
| Spa | 8.4% | 8.2% | 5.3% | 5.0% | 5.3% | 4.8% | 3.2% | 5.1% |
| Hiking/Backpack/Camp | 29.4% | 33.8% | 5.0% | 35.7% | 29.9% | 10.7% | 15.9% | 16.8% |
| Agritourism | 16.9% | 19.3% | 20.6% | 15.0% | 12.2% | 10.3% | 15.9% | 18.6% |
| Sport event/ tournament | 3.1% | 2.0% | 2.2% | 5.7% | 4.3% | 1.8% | 0.4% | 3.8% |
| Park/ botanical garden | 43.6% | 51.8% | 24.3% | 51.2% | 44.3% | 39.7% | 46.2% | 25.6% |
| Waterpark | 0.9% | 0.8% | 3.1% | 1.7% | 3.3% | 2.8% | 6.4% | 5.2% |
| Mountain tube/ waterfall rappel | 0.8% | 0.8% | 1.7% | 0.9% | 2.3% | 1.5% | 1.8% | 4.2% |
| Zip-lining | 4.5% | 5.3% | 0.5% | 3.2% | 2.4% | 5.8% | 1.8% | 1.4% |
| Skydiving | 0.2% | 0.4% | 0.1% | 0.5% | 0.9% | 0.0% | 8.4% | 4.2% |
| All terrain vehicle (ATV) | 2.6% | 3.6% | 0.5% | 2.1% | 4.2% | 4.2% | 6.6% | 6.1% |
| Horseback riding | 2.7% | 2.7% | 4.7% | 2.8% | 1.2% | 2.3% | 6.5% | 1.4% |

ISLAND OF HAWAI'I - ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 98.4% | 97.9% | 96.6% | 98.1% | 99.4% | 96.7% | 97.2% | 98.2% |
| Lunch/ sunset/ dinner/ evening cruise | 18.4% | 18.8% | 8.0% | 18.7% | 27.2% | 18.2% | 51.2% | 38.3% |
| Live music/ stage show | 28.4% | 29.8% | 19.4% | 28.6% | 25.1% | 17.4% | 9.8% | 18.3% |
| Nightclub/ dancing/ bar/ karaoke | 8.7% | 8.8% | 2.9% | 7.7% | 5.4% | 8.5% | 3.3% | 5.2% |
| Fine dining | 49.9% | 50.7% | 30.9% | 43.4% | 36.1% | 32.6% | 28.9% | 42.5% |
| Family restaurant | 63.5% | 61.6% | 23.4% | 61.4% | 49.5% | 61.5% | 21.4% | 37.8% |
| Fast food | 31.1% | 31.7% | 45.1% | 41.7% | 40.6% | 39.4% | 48.5% | 50.4% |
| Food truck | 18.2% | 17.1% | 6.2% | 18.7% | 21.2% | 16.7% | 15.0% | 43.6% |
| Café/ coffee house | 51.3% | 45.5% | 44.4% | 55.8% | 57.0% | 56.8% | 29.4% | 46.2% |
| Ethnic dining | 31.3% | 31.7% | 8.2% | 25.2% | 14.9% | 14.2% | 18.5% | 20.6% |
| Prepared own meal | 60.1% | 47.5% | 33.2% | 74.1% | 41.3% | 35.0% | 19.6% | 15.5% |

ISLAND OF HAWAI'I - ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 97.0% | 95.9% | 95.9% | 96.8% | 96.8% | 93.3% | 95.4% | 98.6% |
| Mall/ department store | 31.4% | 29.8% | 56.4% | 50.9% | 46.5% | 51.2% | 51.8% | 72.3% |
| Designer boutique | 13.7% | 14.0% | 5.8% | 14.9% | 11.9% | 16.2% | 7.0% | 3.2% |
| Hotel/ resort store | 28.9% | 33.4% | 27.7% | 24.2% | 26.0% | 26.4% | 18.3% | 25.8% |
| Swap meet/ flea market | 16.9% | 14.3% | 2.6% | 14.8% | 6.4% | 8.0% | 2.4% | 5.7% |
| Discount/ outlet store | 12.9% | 11.7% | 6.6% | 14.7% | 15.4% | 31.4% | 26.1% | 55.6% |
| Supermarket | 72.6% | 62.9% | 72.5% | 76.1% | 74.6% | 56.9% | 69.5% | 54.1% |
| Farmer's market | 52.3% | 44.1% | 21.3% | 57.5% | 39.4% | 22.6% | 18.5% | 14.0% |
| Convenience store | 40.2% | 41.4% | 21.4% | 45.1% | 32.6% | 49.4% | 39.2% | 42.5% |
| Duty free store | 2.0% | 2.7% | 7.0% | 4.4% | 4.5% | 11.9% | 31.3% | 44.0% |
| Local shop/ artisan | 68.1% | 68.4% | 14.9% | 67.5% | 63.2% | 60.1% | 21.9% | 15.9% |

ISLAND OF HAWAI'I – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 72.4% | 73.4% | 58.9% | 74.3% | 70.2% | 66.1% | 77.9% | 70.1% |
| Historic military site | 7.4% | 14.1% | 13.6% | 8.7% | 21.2% | 31.4% | 37.0% | 15.3% |
| Other historical site | 40.1% | 40.5% | 26.4% | 42.1% | 37.8% | 29.8% | 34.8% | 27.5% |
| Museum/ art gallery | 19.7% | 18.8% | 2.7% | 21.1% | 18.5% | 19.4% | 14.0% | 7.0% |
| Luau/ Polynesian show/ hula show | 24.5% | 31.8% | 14.1% | 26.7% | 25.5% | 21.8% | 9.9% | 28.6% |
| Lesson- ex. ukulele, hula, canoe, lei making | 6.0% | 7.3% | 5.9% | 6.5% | 5.4% | 7.2% | 8.0% | 6.6% |
| Play/ concert/ theatre | 3.3% | 3.9% | 2.2% | 4.1% | 4.7% | 4.1% | 3.7% | 5.1% |
| Art/ craft fair | 18.7% | 12.9% | 3.3% | 16.4% | 10.2% | 6.8% | 12.6% | 5.1% |
| Festival event | 6.5% | 5.4% | 3.4% | 6.0% | 4.0% | 1.0% | 1.4% | 3.7% |

ISLAND OF HAWAI'I - ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 92.6% | 93.7% | 96.4% | 95.7% | 96.6% | 93.8% | 93.5% | 94.9% |
| Airport shuttle | 15.2% | 16.6% | 18.9% | 16.7% | 21.2% | 35.8% | 20.9% | 14.4% |
| Trolley | 2.0% | 2.9% | 14.1% | 4.7% | 4.9% | 16.3% | 3.7% | 13.2% |
| Public bus | 1.6% | 2.2% | 2.9% | 3.4% | 12.2% | 14.4% | 10.2% | 10.2% |
| Tour bus/ tour van | 7.2% | 16.0% | 30.6% | 8.4% | 15.8% | 34.1% | 15.7% | 28.7% |
| Taxi/ limo | 5.7% | 8.8% | 22.8% | 11.3% | 19.6% | 22.0% | 23.2% | 20.5% |
| Rental car | 84.3% | 80.8% | 50.6% | 87.8% | 78.0% | 53.4% | 57.8% | 56.4% |
| Ride share | 7.2% | 7.6% | 1.9% | 4.5% | 11.8% | 12.6% | 11.7% | 6.9% |
| Bicycle rental | 2.0% | 1.2% | 1.0% | 2.6% | 3.8% | 2.1% | 3.2% | 0.9% |

ISLAND OF HAWAI'I - ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 33.6% | 22.4% | 13.0% | 19.9% | 13.7% | 6.6% | 15.3% | 21.4% |
| Visit friends/ family | 32.4% | 21.7% | 12.8% | 18.9% | 13.5% | 6.6% | 14.4% | 17.6% |
| Volunteer- non-profit | 1.9% | 1.2% | 0.6% | 1.5% | 0.3% | 0.5% | 1.4% | 4.2% |

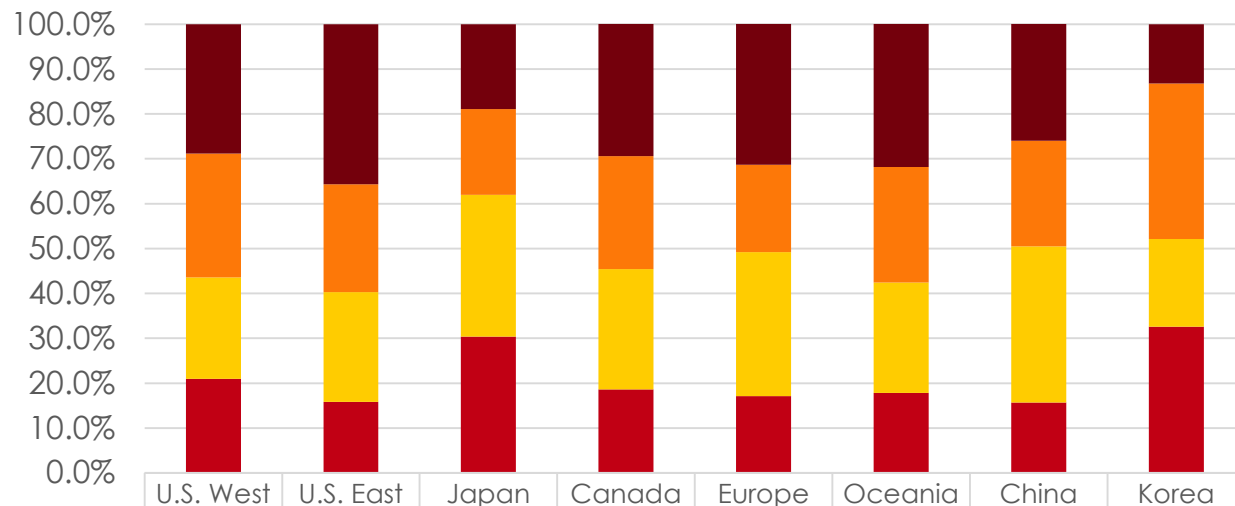
ATTRACTIONS – ISLAND OF HAWAII

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| 'Akaka Falls | 31.8% | 39.4% | 23.0% | 38.2% | 43.5% | 26.3% | 30.2% | 29.9% |
| Botanical Gardens | 22.0% | 23.1% | 3.8% | 22.4% | 23.0% | 21.8% | 20.5% | 9.7% |
| H.N. Greenwell Store | 4.4% | 5.2% | 0.5% | 5.9% | 2.3% | 2.3% | 1.4% | 3.3% |
| Hawaii Volcanoes National Park | 36.4% | 48.4% | 31.5% | 49.7% | 58.0% | 53.8% | 60.9% | 42.1% |
| Hilo Farmers Market | 24.2% | 24.6% | 13.9% | 26.8% | 24.3% | 19.1% | 20.9% | 14.1% |
| Hulihe'e Palace | 7.5% | 7.5% | 4.7% | 8.2% | 8.3% | 9.6% | 7.4% | 6.1% |
| 'Imiloa Astronomy Ctr | 4.0% | 5.3% | 1.3% | 5.5% | 6.8% | 6.6% | 13.5% | 3.8% |
| Kaloko-Honokohau National Historical Park | 9.8% | 12.3% | 1.5% | 12.0% | 12.6% | 5.7% | 12.6% | 4.7% |
| Kona Coffee Living History Farm | 15.7% | 18.2% | 16.0% | 16.5% | 21.1% | 18.1% | 17.7% | 27.8% |
| Lili'uokalani Park and Garden | 8.6% | 10.7% | 2.4% | 6.8% | 8.8% | 8.5% | 3.7% | 6.1% |

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

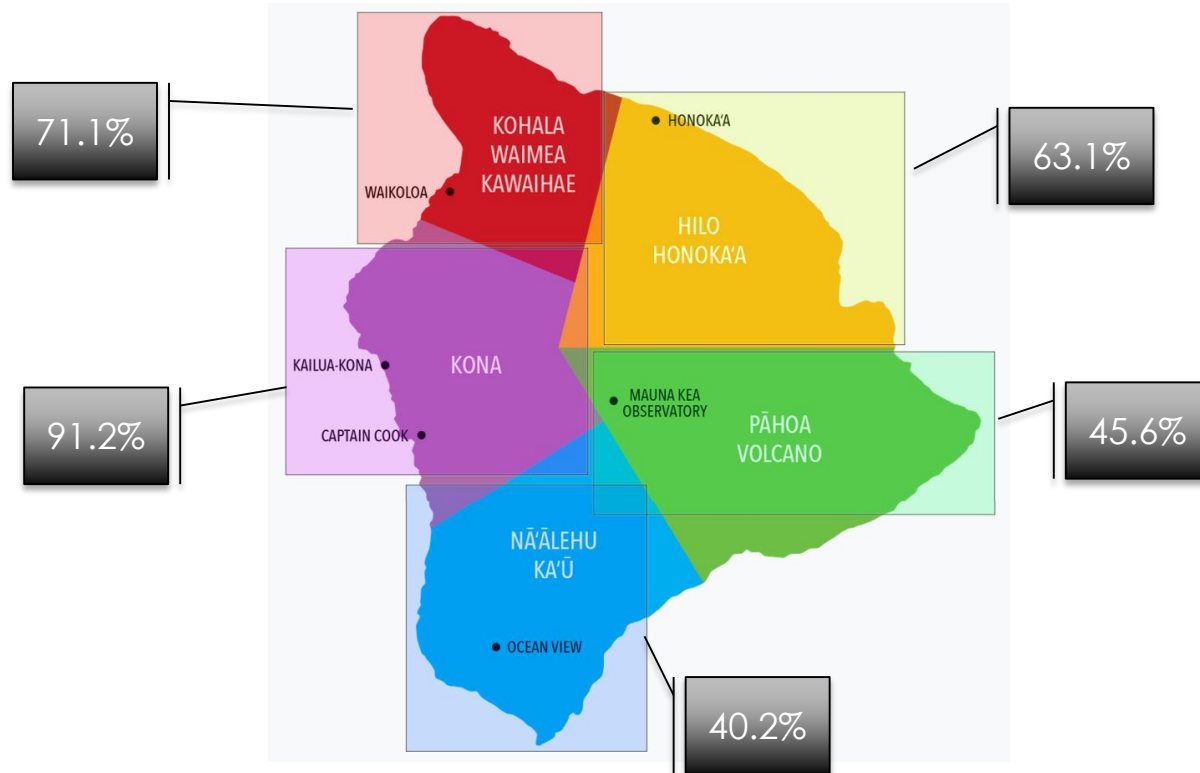
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Lyman House Memorial Museum | 2.8% | 2.3% | 0.6% | 0.7% | 2.0% | 1.8% | 2.2% | 0.9% |
| Mauna | 27.4% | 36.9% | 37.3% | 38.4% | 43.1% | 20.2% | 40.1% | 31.3% |
| Orchid Farm | 5.1% | 6.2% | 0.9% | 4.8% | 6.0% | 7.5% | 14.3% | 1.4% |
| Pacific Tsunami Museum | 4.0% | 4.5% | 1.6% | 3.4% | 5.3% | 6.2% | 4.2% | 1.9% |
| Pana'ewa Rainforest Zoo & Garden | 4.9% | 5.7% | 0.5% | 5.5% | 5.0% | 3.4% | 5.0% | 2.3% |
| Pu'uhonua o Honaunau National Historical Park | 22.9% | 24.4% | 3.7% | 26.3% | 29.9% | 10.2% | 14.0% | 6.1% |
| Pu'ukohola Heia National Historical Site | 11.3% | 13.3% | 2.5% | 12.6% | 15.6% | 8.6% | 4.2% | 2.3% |
| Punalu'u Black Sand Beach | 33.8% | 42.4% | 14.0% | 42.4% | 44.9% | 36.9% | 50.0% | 18.6% |
| Rainbow Falls | 27.3% | 36.1% | 14.3% | 31.0% | 37.7% | 25.8% | 51.6% | 10.7% |
| Volcano Art Center | 9.7% | 9.5% | 7.0% | 11.5% | 12.7% | 14.7% | 9.8% | 7.0% |

TRAVEL ON ISLAND OF HAWAI'I

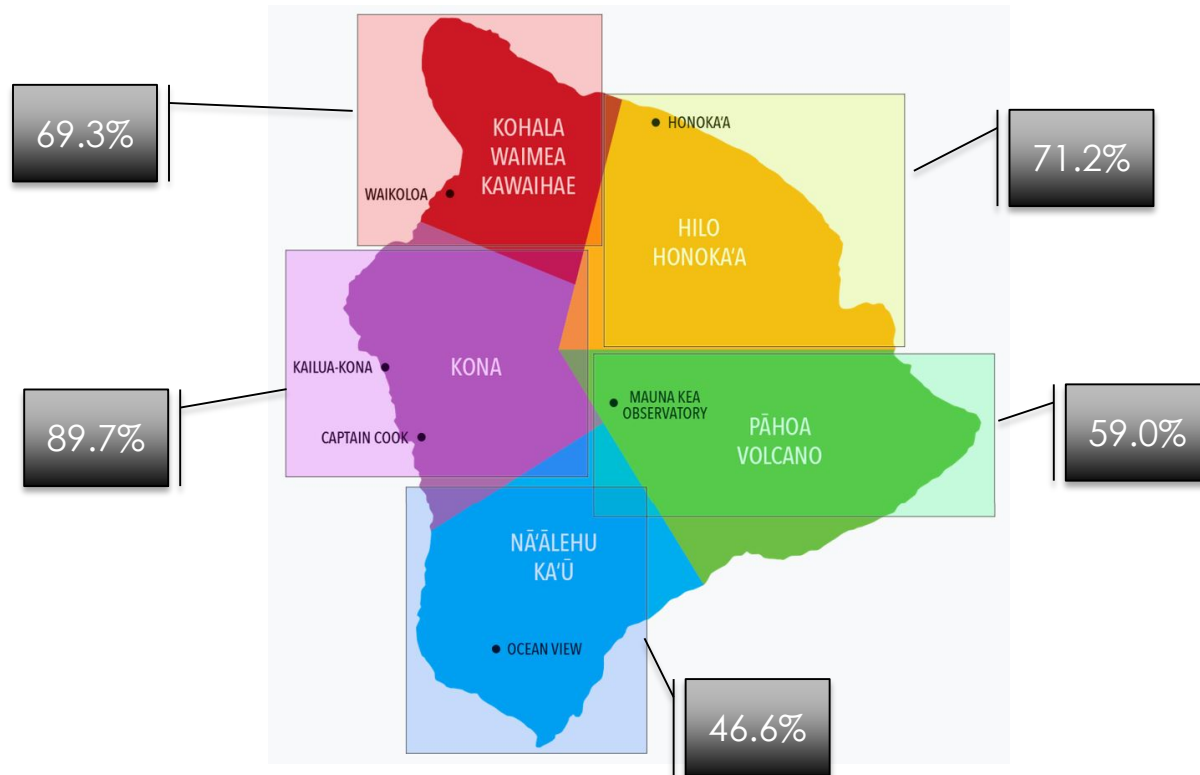


| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Traveled to other side of island | 28.8% | 35.7% | 18.9% | 29.5% | 31.4% | 31.9% | 26.1% | 13.2% |
| Traveled more than 1 hour | 27.6% | 24.0% | 19.1% | 25.2% | 19.5% | 25.8% | 23.5% | 34.7% |
| Traveled 1 hour or less one way to reach activity | 22.6% | 24.5% | 31.6% | 26.8% | 32.1% | 24.6% | 34.8% | 19.5% |
| Enjoy activities- short drive from accommodations | 21.0% | 15.8% | 30.4% | 18.6% | 17.1% | 17.8% | 15.7% | 32.6% |
| BASE | 1,935 | 1,771 | 1,148 | 1,264 | 336 | 171 | 204 | 211 |

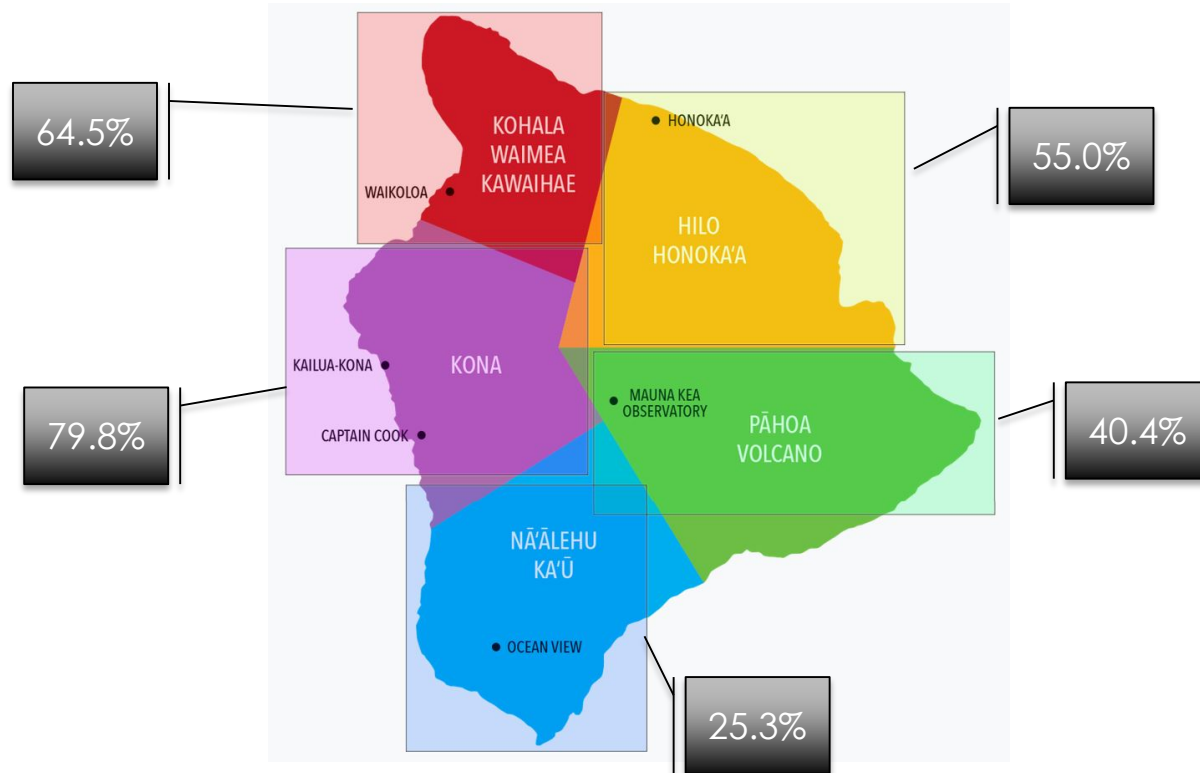
AREAS VISITED U.S. WEST



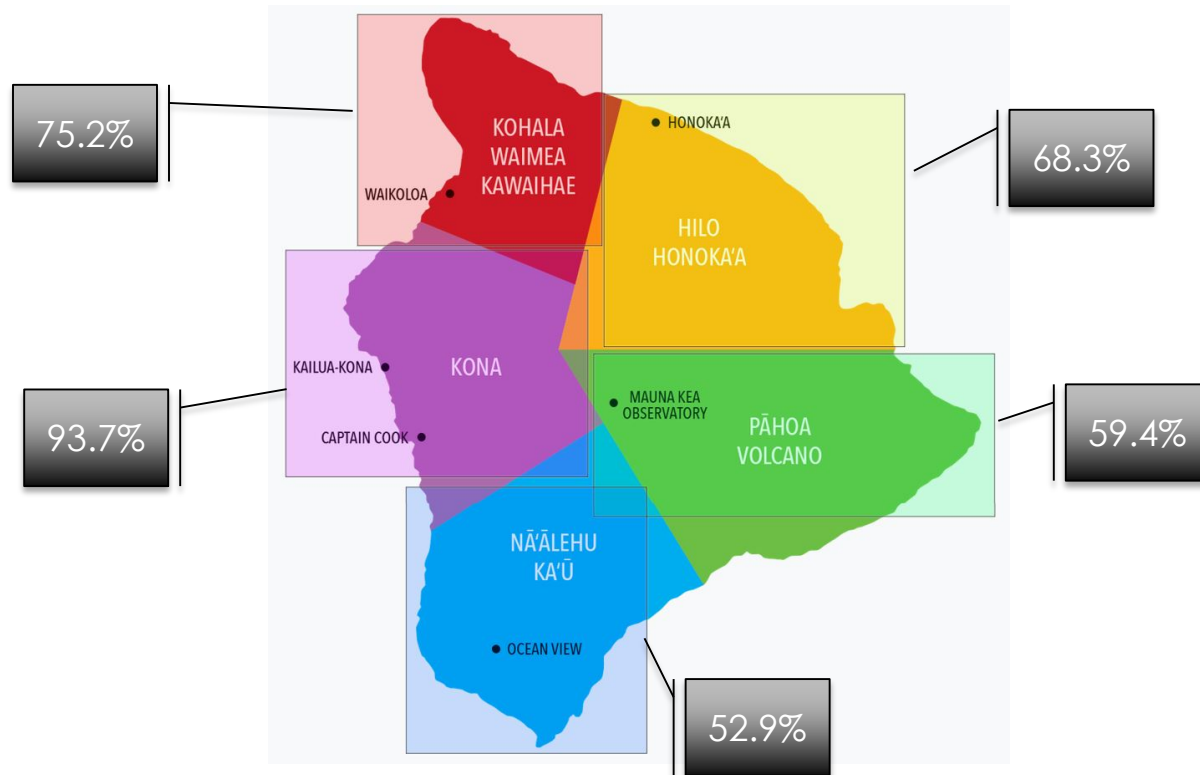
AREAS VISITED U.S. EAST



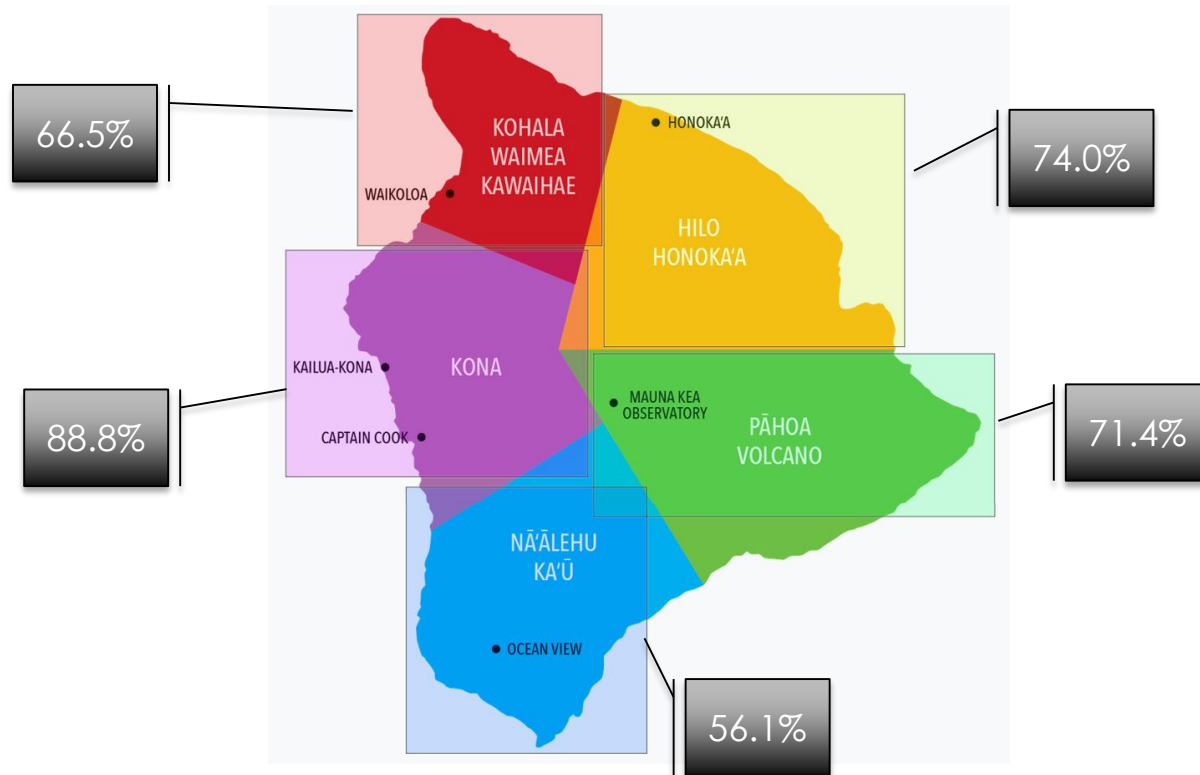
AREAS VISITED JAPAN



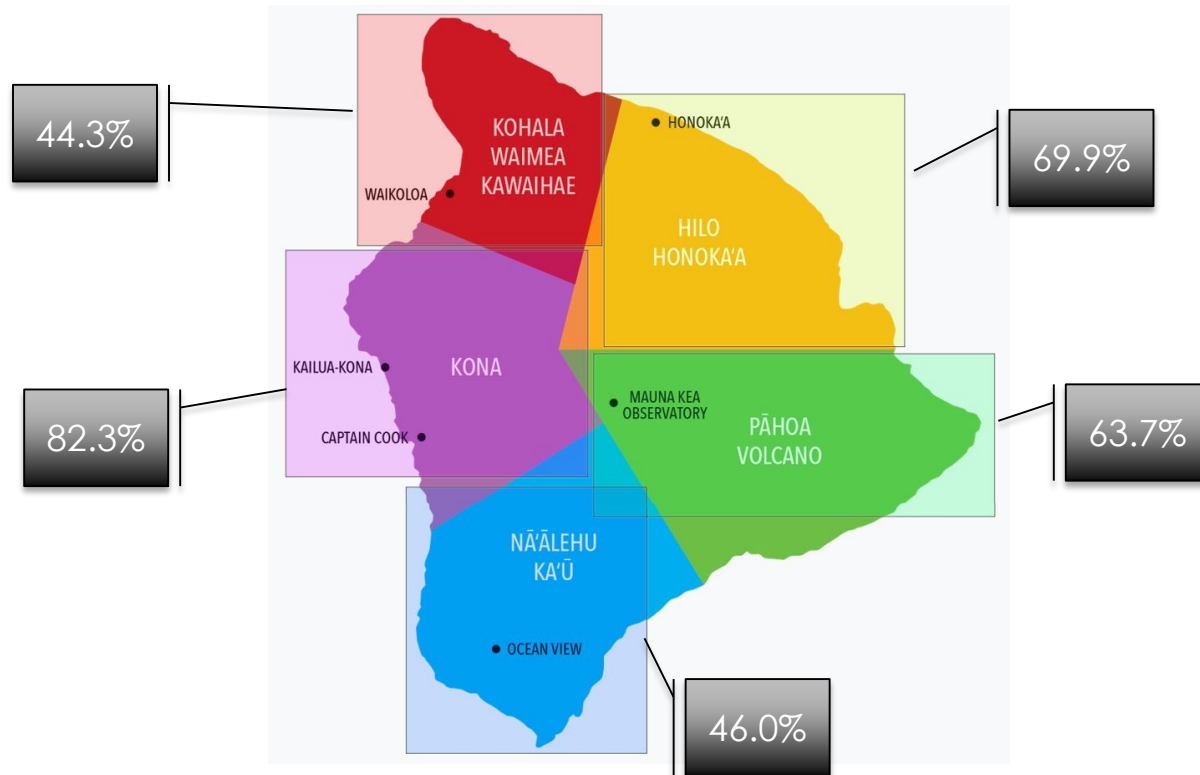
AREAS VISITED CANADA



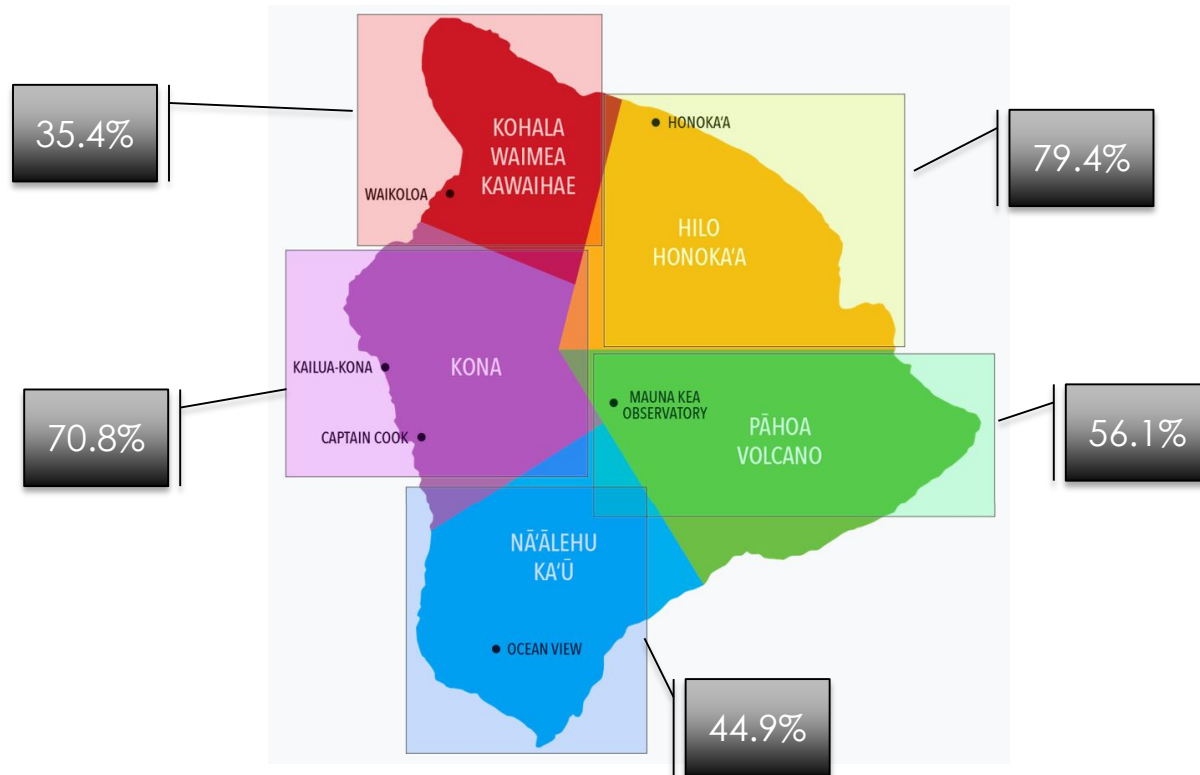
AREAS VISITED EUROPE



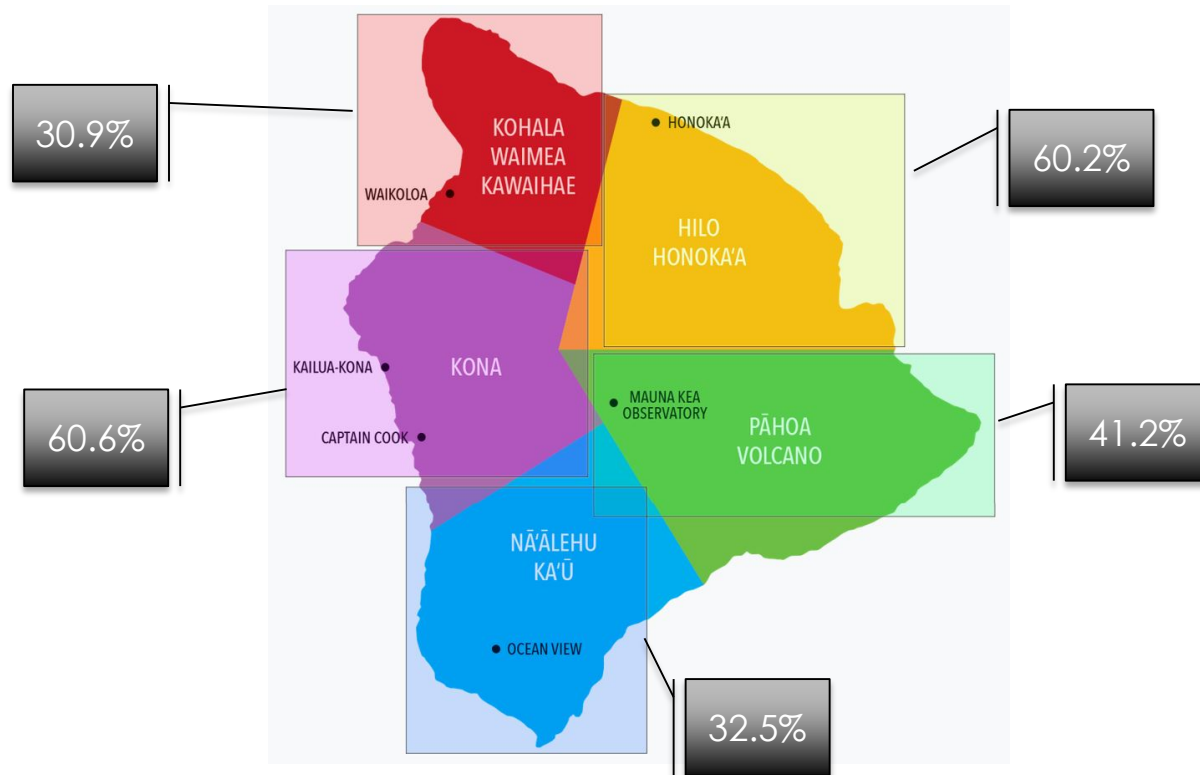
AREAS VISITED OCEANIA



AREAS VISITED CHINA

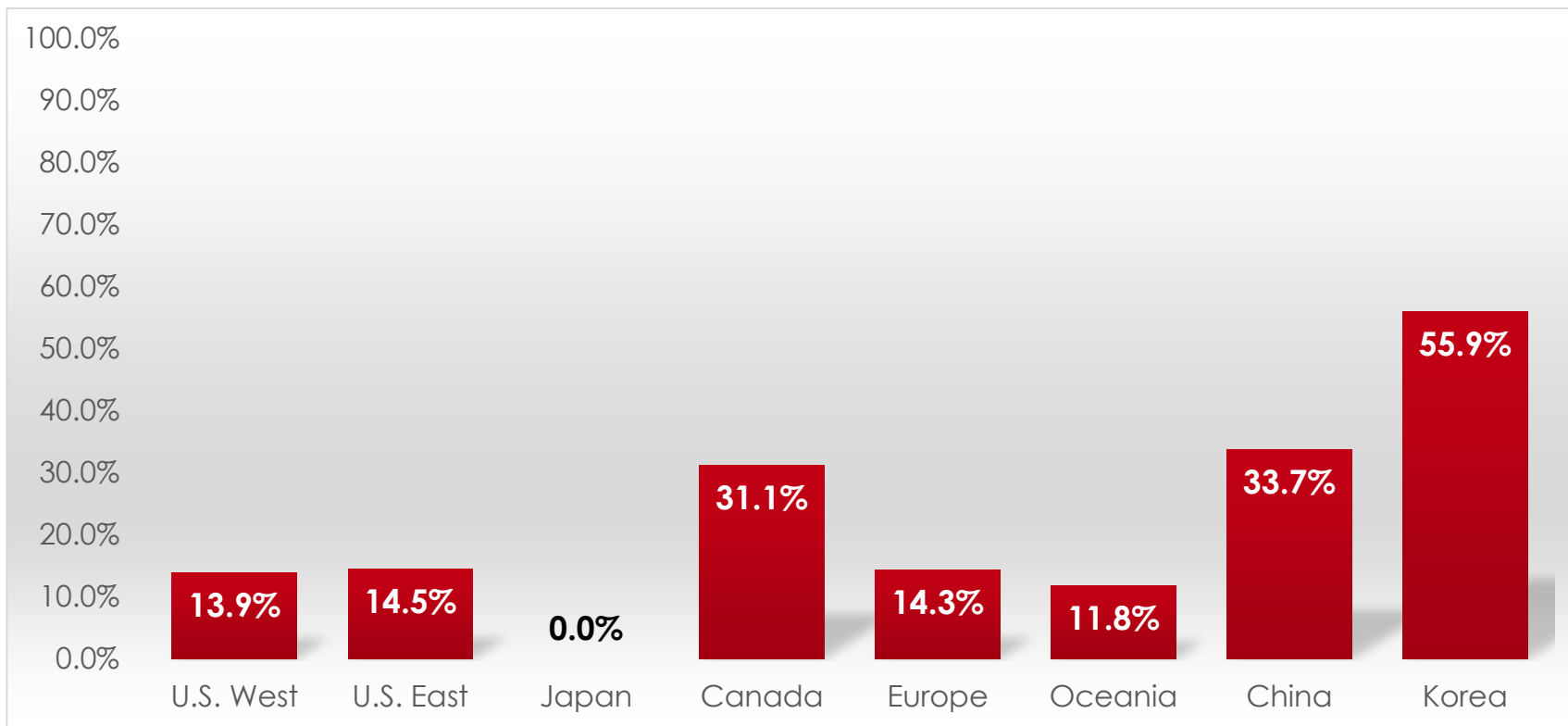


AREAS VISITED KOREA



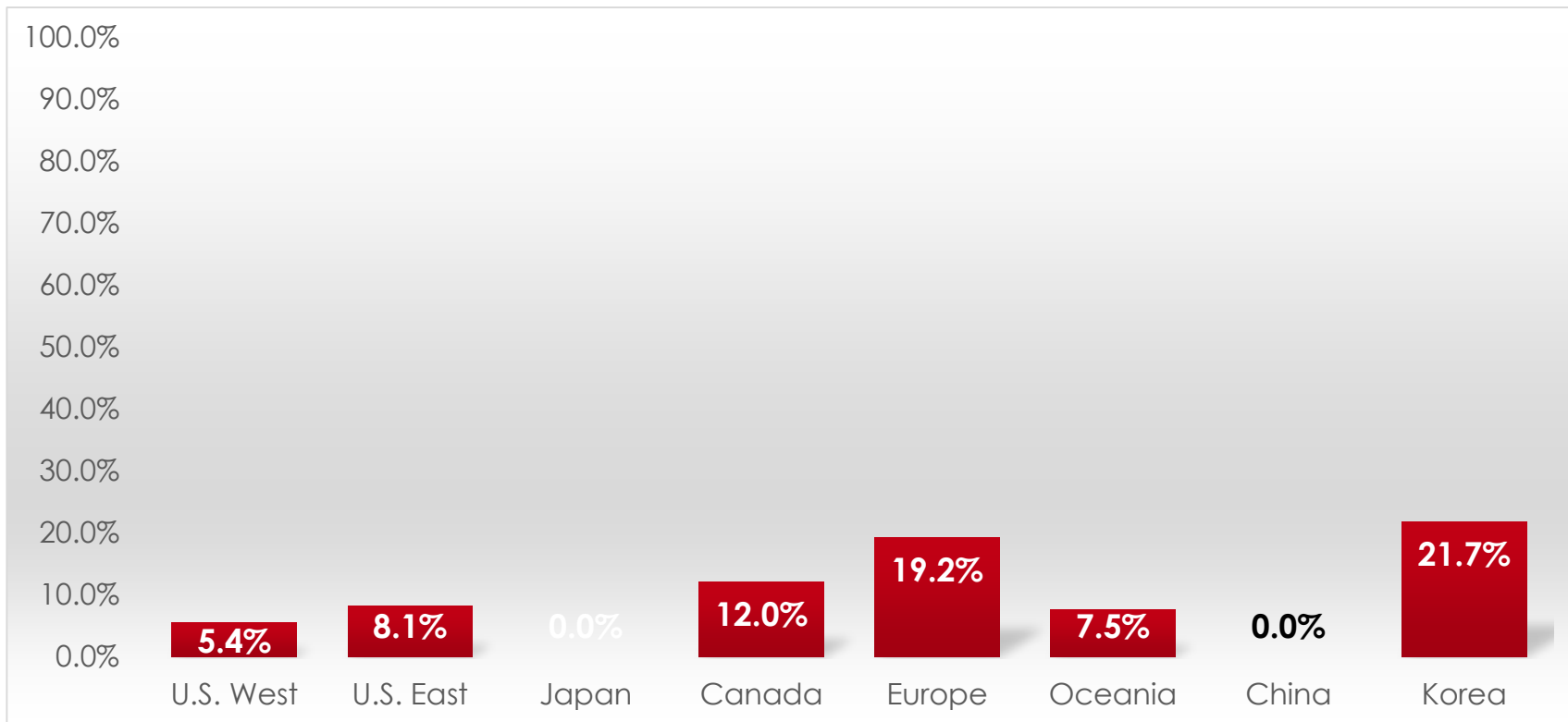
SECTION – ISLAND OF MOLOKA‘I

AIDED ADVERTISING AWARENESS – MOLOKA'I



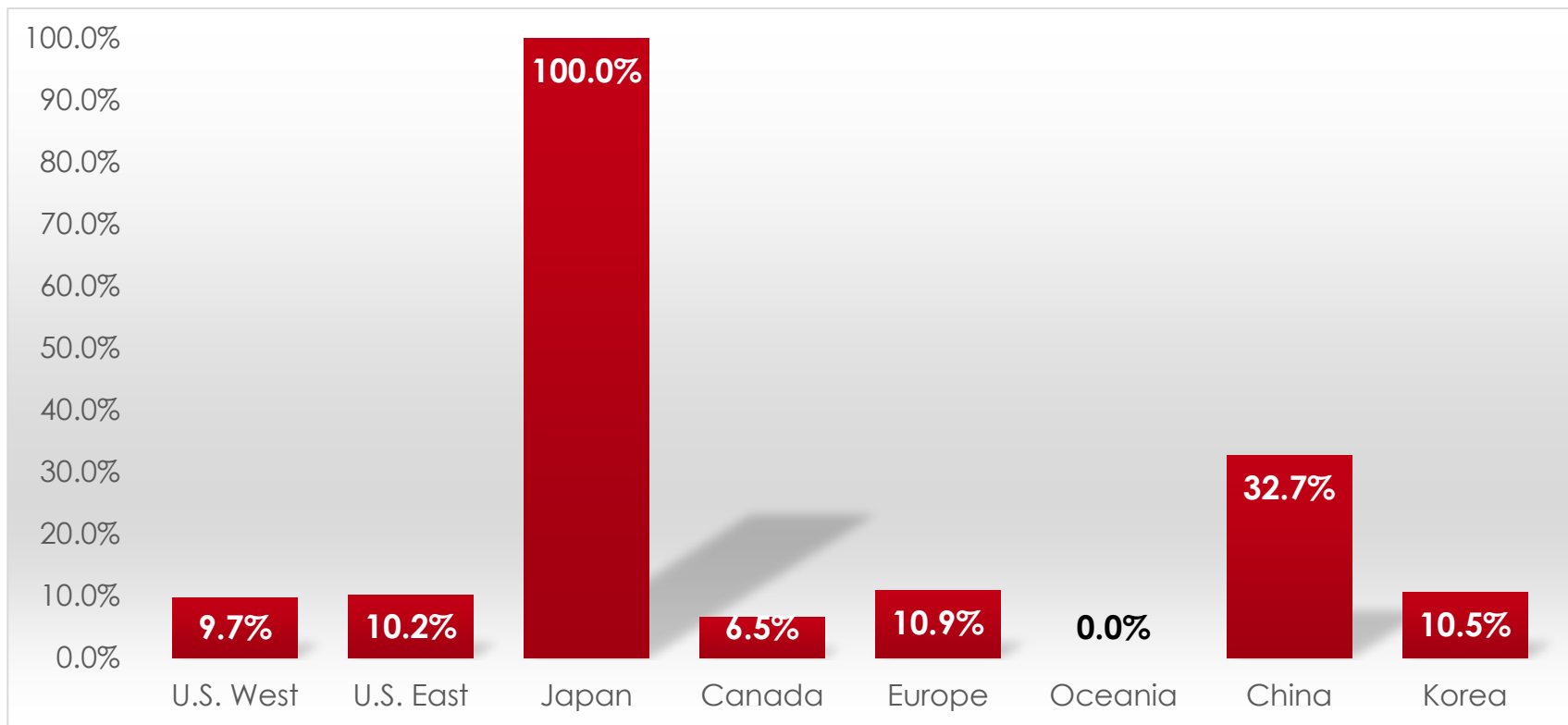
Sample sizes for Moloka'i are relatively small.

IMPACT OF LOCATION FILMING– MOLOKA‘I



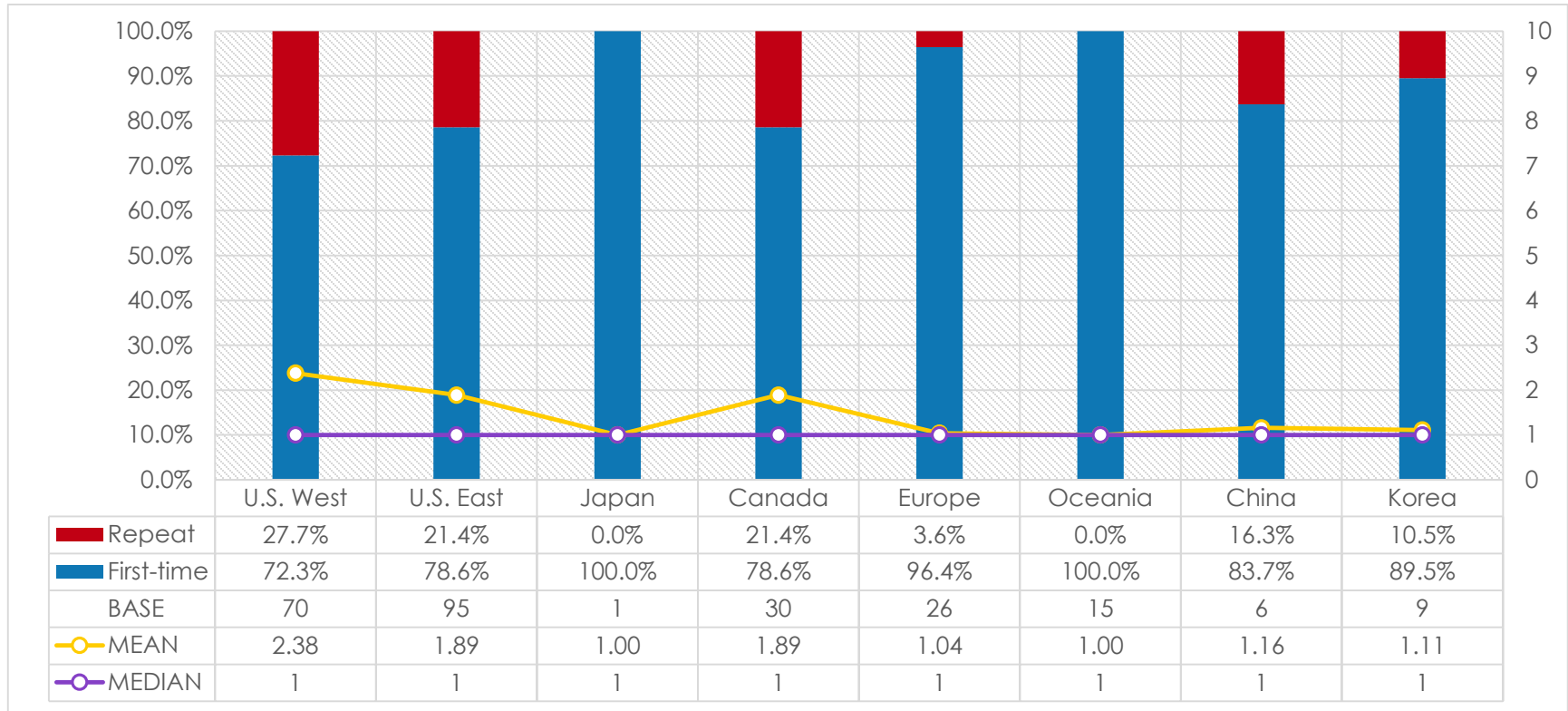
Sample sizes for Moloka'i are relatively small.

IMPACT OF HAWAIIAN MUSIC – MOLOKA‘I



Sample sizes for Moloka'i are relatively small.

1ST TIME VS REPEAT VISITOR – MOLOKA'I



ACCOMMODATIONS – MOLOKA‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------|-----------|-----------|--------|--------|--------|---------|--------|--------|
| Hotel | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Sample sizes for Moloka‘i are relatively small.

STRENGTHS/ POSITIVE ASPECTS – MOLOKA‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------|-----------|-----------|--------|--------|--------|---------|-------|-------|
| Natural beauty | 29.0% | 28.0% | 0.0% | 37.1% | 46.6% | 21.0% | 16.3% | 0.0% |
| Local culture | 12.5% | 22.6% | 100.0% | 20.3% | 11.3% | 5.9% | 17.3% | 0.0% |
| Aloha spirit | 17.3% | 11.8% | 0.0% | 7.1% | 22.6% | 19.4% | 0.0% | 0.0% |
| Activities- variety | 12.5% | 4.2% | 0.0% | 3.0% | 0.0% | 15.1% | 0.0% | 77.6% |
| Beach/ ocean | 8.6% | 9.6% | 0.0% | 3.0% | 0.0% | 5.9% | 0.0% | 22.4% |

Sample sizes for Moloka‘i are relatively small.

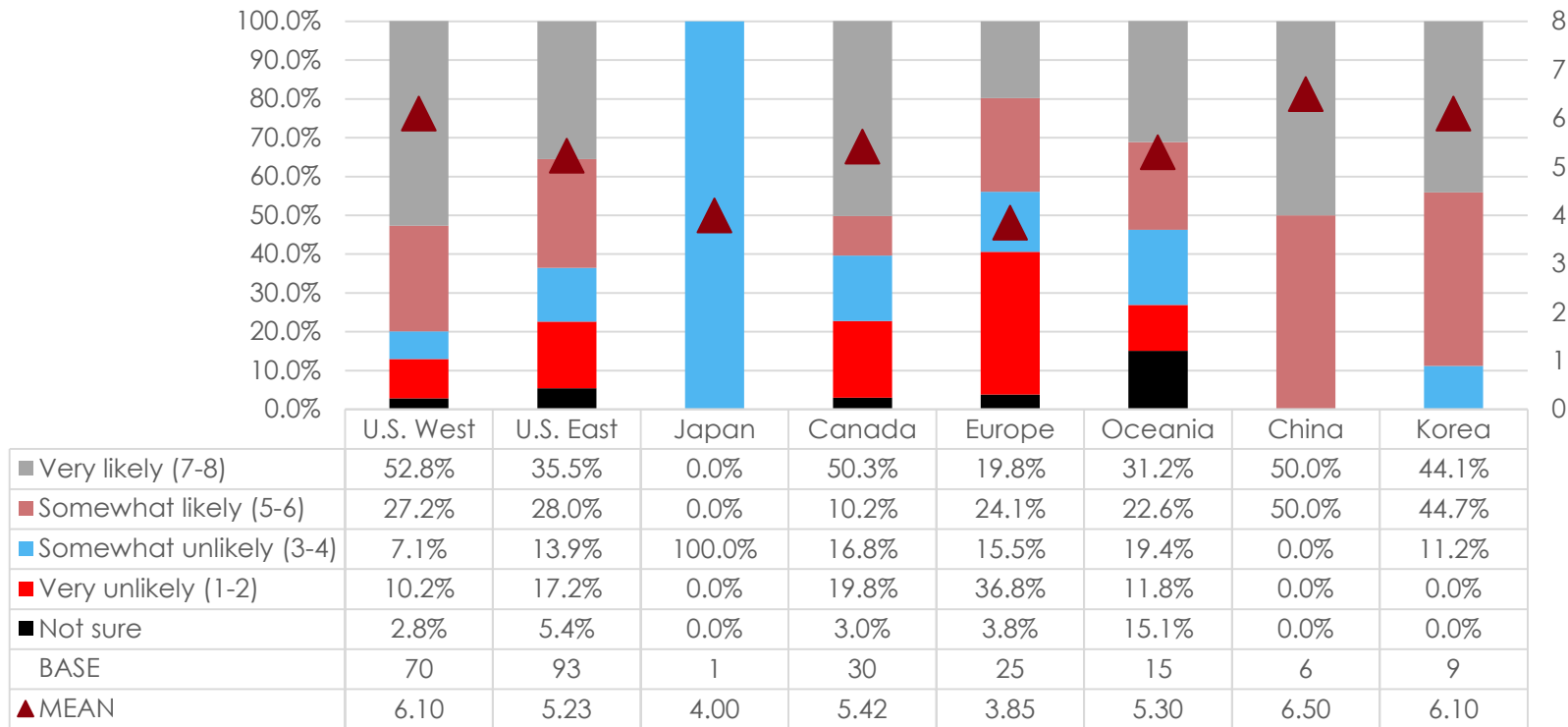
AREAS OF OPPORTUNITIES – MOLOKA‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------|-----------|-----------|--------|--------|--------|---------|-------|-------|
| Nothing | 55.7% | 58.7% | 0.0% | 45.6% | 51.9% | 82.3% | 50.0% | 33.5% |
| Food- variety | 17.3% | 13.1% | 100.0% | 23.9% | 3.8% | 0.0% | 16.3% | 11.2% |
| Not enough local culture | 8.6% | 3.2% | 0.0% | 10.7% | 3.8% | 0.0% | 0.0% | 11.2% |
| Activities- variety | 1.5% | 5.4% | 0.0% | 0.0% | 12.3% | 0.0% | 0.0% | 0.0% |
| Safety concerns | 4.4% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 16.3% | 11.2% |

Sample sizes for Moloka‘i are relatively small.

LIKELIHOOD OF RETURN VISIT – MOLOKA'I

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



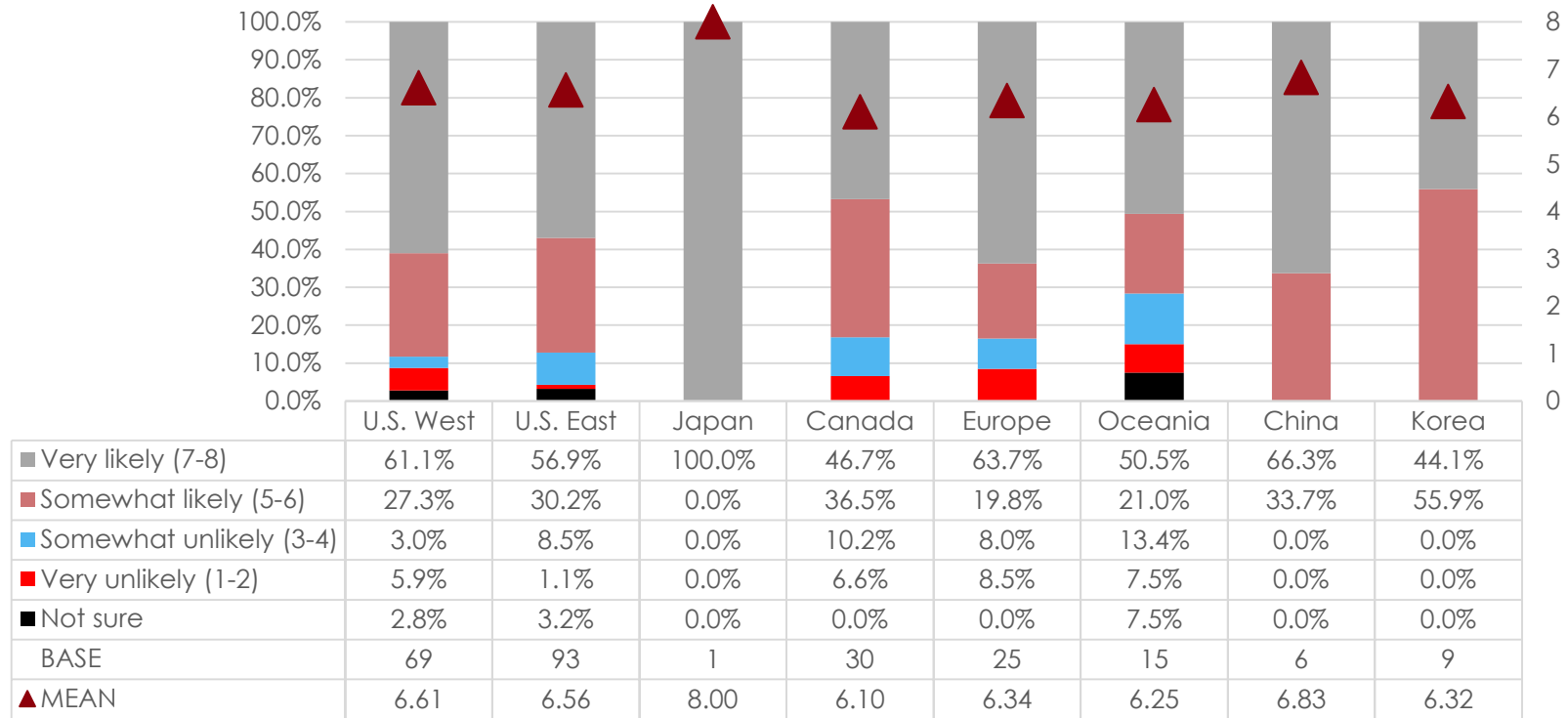
REASONS FOR NOT RETURNING – MOLOKA‘I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|--------|--------|--------|---------|-------|--------|
| Want to visit someplace new | 34.7% | 49.9% | 100.0% | 50.0% | 28.6% | 58.1% | 0.0% | 100.0% |
| No compelling reason to return | 36.3% | 35.4% | 0.0% | 16.7% | 14.3% | 29.1% | 0.0% | 100.0% |
| Flight too long | 0.0% | 11.7% | 0.0% | 0.0% | 42.9% | 0.0% | 0.0% | 0.0% |
| Value | 7.3% | 3.0% | 0.0% | 16.7% | 15.2% | 12.8% | 0.0% | 0.0% |
| Age/ poor health | 7.3% | 6.0% | 0.0% | 0.0% | 6.7% | 0.0% | 0.0% | 0.0% |
| Inconvenient travel connection | 13.7% | 0.0% | 0.0% | 9.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Too expensive | 0.0% | 5.8% | 0.0% | 7.6% | 21.9% | 0.0% | 0.0% | 0.0% |

Sample sizes for Moloka‘i are relatively small.

MOLOKA'I - BRAND/DESTINATION – ADVOCACY

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



MOLOKA'I - ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|--------|--------|--------|---------|--------|--------|
| TOTAL | 98.5% | 97.8% | 100.0% | 100.0% | 100.0% | 94.1% | 100.0% | 100.0% |
| On own (self-guided) | 81.1% | 53.0% | 100.0% | 64.0% | 64.7% | 44.6% | 50.0% | 66.5% |
| Helicopter/ airplane | 10.2% | 10.5% | 0.0% | 13.2% | 11.8% | 13.4% | 0.0% | 0.0% |
| Boat/ submarine/ whale | 7.2% | 13.9% | 0.0% | 13.7% | 3.8% | 5.9% | 0.0% | 44.1% |
| Visit towns | 53.7% | 44.5% | 0.0% | 53.3% | 40.1% | 19.4% | 0.0% | 11.2% |
| Limo/ van/ bus tour | 5.9% | 18.2% | 0.0% | 6.6% | 11.8% | 13.4% | 16.3% | 11.2% |
| Scenic views/ natural landmark | 58.3% | 55.2% | 0.0% | 71.1% | 48.6% | 38.7% | 50.0% | 11.2% |
| Movie/ TV/ film location | 0.0% | 1.1% | 0.0% | 0.0% | 3.8% | 0.0% | 17.3% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|--------|--------|--------|---------|-------|--------|
| TOTAL | 92.8% | 79.6% | 100.0% | 89.8% | 88.2% | 79.0% | 82.7% | 100.0% |
| Beach/ sunbathing | 63.7% | 50.7% | 0.0% | 71.1% | 56.1% | 61.3% | 32.7% | 44.7% |
| Bodyboard/ Standup paddle board | 5.7% | 2.1% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% | 11.2% |
| Surfing | 1.5% | 1.0% | 0.0% | 7.1% | 0.0% | 5.9% | 17.3% | 11.2% |
| Canoeing/ kayak | 7.2% | 6.6% | 0.0% | 6.6% | 4.3% | 0.0% | 0.0% | 0.0% |
| Swim- ocean | 37.9% | 32.3% | 0.0% | 41.2% | 27.8% | 36.0% | 16.3% | 22.4% |
| Snorkel | 24.8% | 26.8% | 0.0% | 44.2% | 26.8% | 47.9% | 0.0% | 88.8% |
| Windsurf/ Kitesurf | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Jet ski/ Parasail | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Scuba | 1.5% | 3.2% | 0.0% | 7.1% | 0.0% | 0.0% | 16.3% | 21.7% |
| Fishing | 10.0% | 0.0% | 0.0% | 3.0% | 0.0% | 0.0% | 16.3% | 0.0% |
| Golf | 3.0% | 0.0% | 0.0% | 7.1% | 0.0% | 11.8% | 0.0% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|--------|--------|--------|---------|-------|--------|
| TOTAL | 92.8% | 79.6% | 100.0% | 89.8% | 88.2% | 79.0% | 82.7% | 100.0% |
| Run/ Jog/ Fitness walk | 17.4% | 13.0% | 0.0% | 20.3% | 8.0% | 5.9% | 0.0% | 0.0% |
| Spa | 1.5% | 1.0% | 0.0% | 3.6% | 0.0% | 0.0% | 16.3% | 0.0% |
| Hiking/Backpack/Camp | 39.1% | 25.9% | 0.0% | 50.8% | 16.5% | 7.5% | 0.0% | 0.0% |
| Agritourism | 5.9% | 15.2% | 100.0% | 19.8% | 4.3% | 0.0% | 16.3% | 0.0% |
| Sport event/ tournament | 1.5% | 3.2% | 0.0% | 6.6% | 0.0% | 0.0% | 16.3% | 0.0% |
| Park/ botanical garden | 25.8% | 25.8% | 100.0% | 27.5% | 25.0% | 5.9% | 0.0% | 0.0% |
| Waterpark | 0.0% | 0.0% | 0.0% | 0.0% | 3.8% | 0.0% | 0.0% | 0.0% |
| Mountain tube/ waterfall rappel | 0.0% | 0.0% | 0.0% | 0.0% | 8.5% | 0.0% | 0.0% | 0.0% |
| Zip-lining | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.5% | 0.0% | 0.0% |
| Skydiving | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 16.3% | 0.0% |
| All terrain vehicle (ATV) | 1.5% | 1.0% | 0.0% | 0.0% | 4.3% | 0.0% | 0.0% | 0.0% |
| Horseback riding | 1.5% | 3.3% | 0.0% | 0.0% | 0.0% | 5.9% | 0.0% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|--------|--------|--------|---------|-------|--------|
| TOTAL | 97.2% | 86.1% | 100.0% | 89.8% | 88.2% | 79.0% | 82.7% | 100.0% |
| Lunch/ sunset/ dinner/ evening cruise | 15.6% | 11.7% | 0.0% | 16.2% | 27.8% | 7.5% | 33.7% | 11.2% |
| Live music/ stage show | 23.0% | 20.4% | 0.0% | 27.5% | 23.6% | 25.3% | 49.0% | 0.0% |
| Nightclub/ dancing/ bar/ karaoke | 5.9% | 3.3% | 0.0% | 6.6% | 0.0% | 0.0% | 0.0% | 0.0% |
| Fine dining | 14.4% | 17.3% | 0.0% | 13.7% | 23.6% | 21.0% | 0.0% | 22.4% |
| Family restaurant | 45.2% | 44.3% | 0.0% | 38.2% | 19.3% | 25.3% | 0.0% | 11.2% |
| Fast food | 25.1% | 18.2% | 0.0% | 24.4% | 32.6% | 11.8% | 33.7% | 22.4% |
| Food truck | 15.4% | 14.1% | 0.0% | 10.2% | 8.0% | 5.9% | 17.3% | 11.2% |
| Café/ coffee house | 28.7% | 33.4% | 100.0% | 36.0% | 48.1% | 19.4% | 0.0% | 33.5% |
| Ethnic dining | 20.2% | 11.8% | 0.0% | 6.0% | 11.3% | 17.7% | 0.0% | 11.2% |
| Prepared own meal | 47.8% | 40.2% | 0.0% | 58.0% | 27.3% | 7.5% | 0.0% | 21.7% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|--------|--------|--------|---------|-------|-------|
| TOTAL | 88.7% | 75.4% | 100.0% | 87.4% | 75.9% | 86.6% | 66.3% | 77.6% |
| Mall/ department store | 3.0% | 5.2% | 0.0% | 3.0% | 8.0% | 32.8% | 33.7% | 11.2% |
| Designer boutique | 4.3% | 1.1% | 0.0% | 6.6% | 0.0% | 7.5% | 32.7% | 0.0% |
| Hotel/ resort store | 7.1% | 6.4% | 0.0% | 3.0% | 8.5% | 21.0% | 16.3% | 11.2% |
| Swap meet/ flea market | 7.4% | 10.7% | 0.0% | 10.2% | 0.0% | 0.0% | 0.0% | 0.0% |
| Discount/ outlet store | 4.3% | 7.4% | 0.0% | 3.0% | 0.0% | 7.5% | 0.0% | 44.1% |
| Supermarket | 50.6% | 40.0% | 0.0% | 43.7% | 60.4% | 19.4% | 17.3% | 32.9% |
| Farmer's market | 40.9% | 31.3% | 0.0% | 41.2% | 23.6% | 13.4% | 17.3% | 0.0% |
| Convenience store | 23.3% | 21.5% | 0.0% | 33.5% | 11.8% | 21.0% | 0.0% | 22.4% |
| Duty free store | 0.0% | 1.0% | 0.0% | 3.0% | 0.0% | 7.5% | 16.3% | 11.2% |
| Local shop/ artisan | 52.2% | 50.6% | 100.0% | 70.6% | 35.8% | 31.2% | 0.0% | 11.2% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 63.7% | 74.3% | 0.0% | 70.1% | 47.6% | 82.3% | 82.7% | 44.1% |
| Historic military site | 7.4% | 6.3% | 0.0% | 9.6% | 0.0% | 15.1% | 33.7% | 0.0% |
| Other historical site | 47.9% | 48.6% | 0.0% | 36.5% | 19.8% | 25.3% | 32.7% | 21.7% |
| Museum/ art gallery | 13.0% | 11.8% | 0.0% | 10.2% | 7.5% | 28.5% | 16.3% | 0.0% |
| Luau/ Polynesian show/ hula show | 4.3% | 15.9% | 0.0% | 3.6% | 11.8% | 25.3% | 0.0% | 11.2% |
| Lesson- ex. ukulele, hula, canoe, lei making | 4.4% | 7.6% | 0.0% | 13.7% | 0.0% | 7.5% | 33.7% | 11.2% |
| Play/ concert/ theatre | 2.8% | 2.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Art/ craft fair | 4.3% | 9.7% | 0.0% | 3.6% | 3.8% | 7.5% | 17.3% | 0.0% |
| Festival event | 4.3% | 10.8% | 0.0% | 12.6% | 8.5% | 0.0% | 0.0% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|-------|--------|--------|---------|-------|--------|
| TOTAL | 82.4% | 81.8% | 0.0% | 80.8% | 80.2% | 94.1% | 49.0% | 100.0% |
| Airport shuttle | 7.1% | 6.5% | 0.0% | 0.0% | 7.5% | 13.4% | 0.0% | 11.2% |
| Trolley | 1.5% | 1.0% | 0.0% | 3.0% | 3.8% | 0.0% | 16.3% | 0.0% |
| Public bus | 1.3% | 4.3% | 0.0% | 0.0% | 3.8% | 21.0% | 16.3% | 0.0% |
| Tour bus/ tour van | 7.2% | 29.8% | 0.0% | 9.6% | 7.5% | 32.8% | 32.7% | 0.0% |
| Taxi/ limo | 5.9% | 7.6% | 0.0% | 3.0% | 11.8% | 19.4% | 0.0% | 0.0% |
| Rental car | 62.4% | 45.5% | 0.0% | 65.1% | 64.7% | 19.4% | 0.0% | 88.8% |
| Ride share | 3.0% | 3.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bicycle rental | 4.3% | 1.0% | 0.0% | 3.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|--------|--------|--------|---------|-------|-------|
| TOTAL | 21.7% | 19.4% | 100.0% | 23.4% | 0.0% | 21.0% | 32.7% | 11.2% |
| Visit friends/ family | 21.7% | 16.3% | 100.0% | 20.3% | 0.0% | 5.9% | 16.3% | 11.2% |
| Volunteer- non-profit | 1.5% | 4.3% | 0.0% | 3.0% | 0.0% | 15.1% | 16.3% | 0.0% |

Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – ATTRACTIONS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Ali'i Fishpond | 17.4% | 7.7% | 0.0% | 10.2% | 7.5% | 5.9% | 16.3% | 0.0% |
| Halawa Beach Park | 36.3% | 29.2% | 0.0% | 23.9% | 32.6% | 21.0% | 0.0% | 0.0% |
| Halawa Valley | 33.0% | 24.9% | 0.0% | 30.5% | 40.1% | 19.4% | 32.7% | 0.0% |
| Kalaupapa National Historic Park | 41.7% | 38.8% | 0.0% | 43.1% | 28.3% | 13.4% | 49.0% | 0.0% |
| Kamakou | 1.5% | 7.6% | 0.0% | 7.1% | 3.8% | 0.0% | 33.7% | 0.0% |
| Kauaiwa Coconut Grove | 10.3% | 10.8% | 0.0% | 13.7% | 16.0% | 0.0% | 32.7% | 0.0% |
| Kapukahehu Beach | 21.8% | 17.3% | 0.0% | 23.9% | 24.1% | 5.9% | 16.3% | 11.2% |
| Kumimi Beach Park | 27.6% | 21.6% | 0.0% | 36.5% | 35.8% | 13.4% | 16.3% | 22.4% |

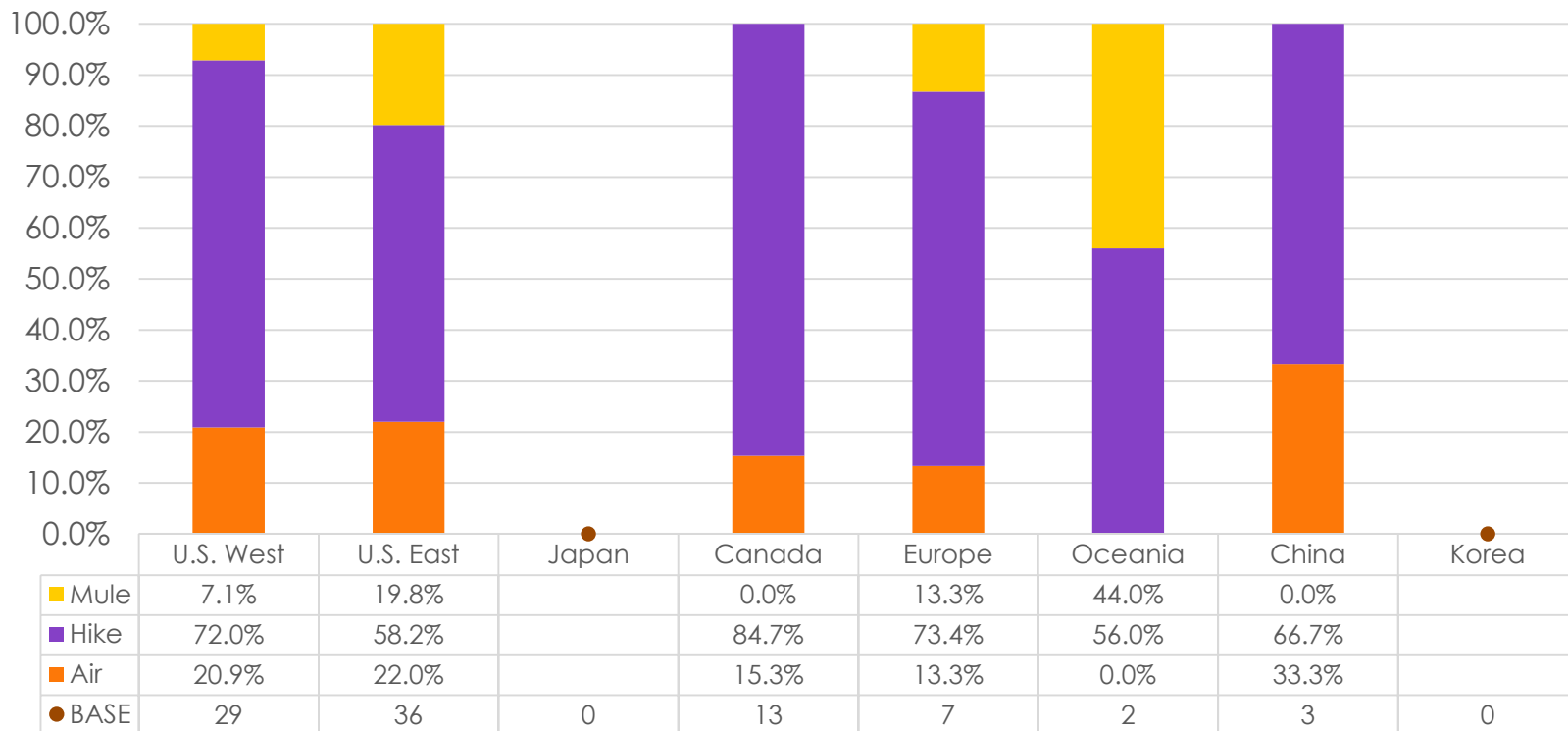
Sample sizes for Moloka'i are relatively small.

MOLOKA'I - ACTIVITIES – ATTRACTIONS

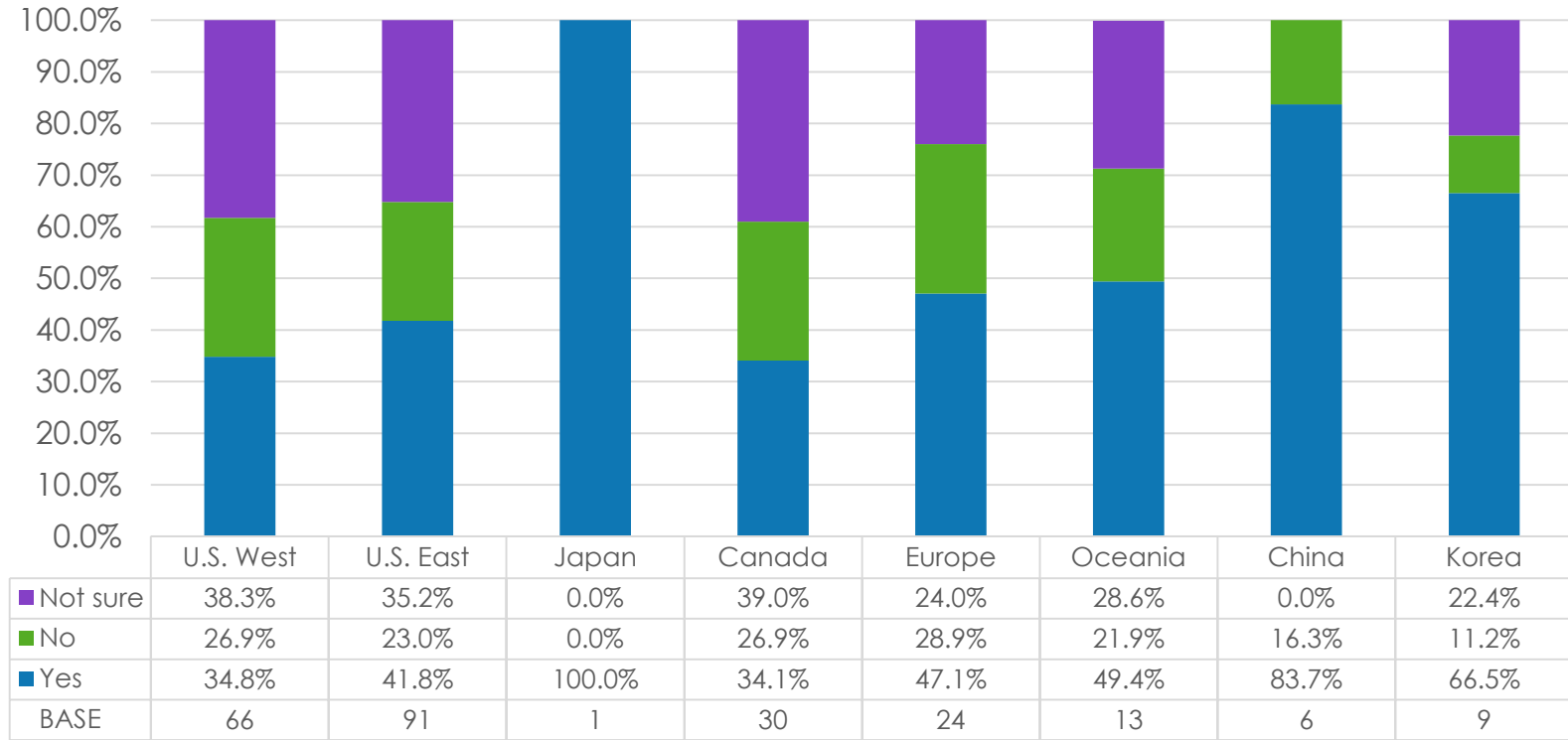
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Moloka'i Mule Ride | 7.2% | 10.9% | 0.0% | 13.2% | 3.8% | 5.9% | 0.0% | 0.0% |
| Moloka'i Museum & Cultural Center | 13.1% | 14.0% | 0.0% | 13.7% | 19.3% | 5.9% | 17.3% | 0.0% |
| Olo'upena Falls | 13.1% | 12.8% | 0.0% | 6.6% | 0.0% | 0.0% | 0.0% | 10.5% |
| One Ali'i Beach Park | 21.8% | 11.9% | 0.0% | 23.9% | 19.8% | 0.0% | 0.0% | 10.5% |
| Pala'au State Park | 17.2% | 20.6% | 0.0% | 43.7% | 24.1% | 0.0% | 33.7% | 32.9% |
| Papohaku Beach | 40.6% | 29.4% | 0.0% | 49.7% | 24.1% | 21.0% | 0.0% | 0.0% |
| Wailau Valley | 18.9% | 14.1% | 0.0% | 16.2% | 24.1% | 0.0% | 16.3% | 0.0% |

Sample sizes for Moloka'i are relatively small.

KALAUPAPA NATIONAL HISTORICAL PARK - EXPERIENCE

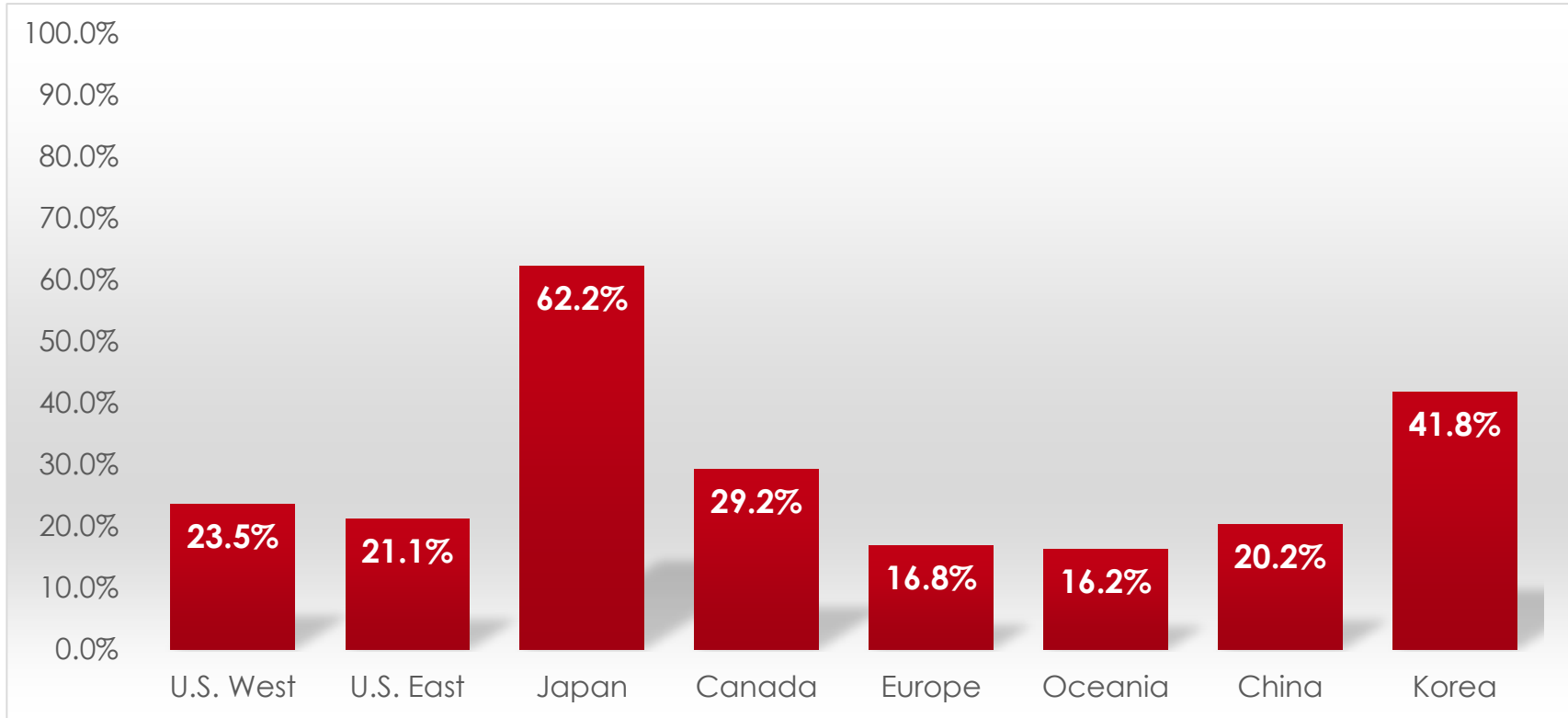


AIRPORT VISITORS CENTER



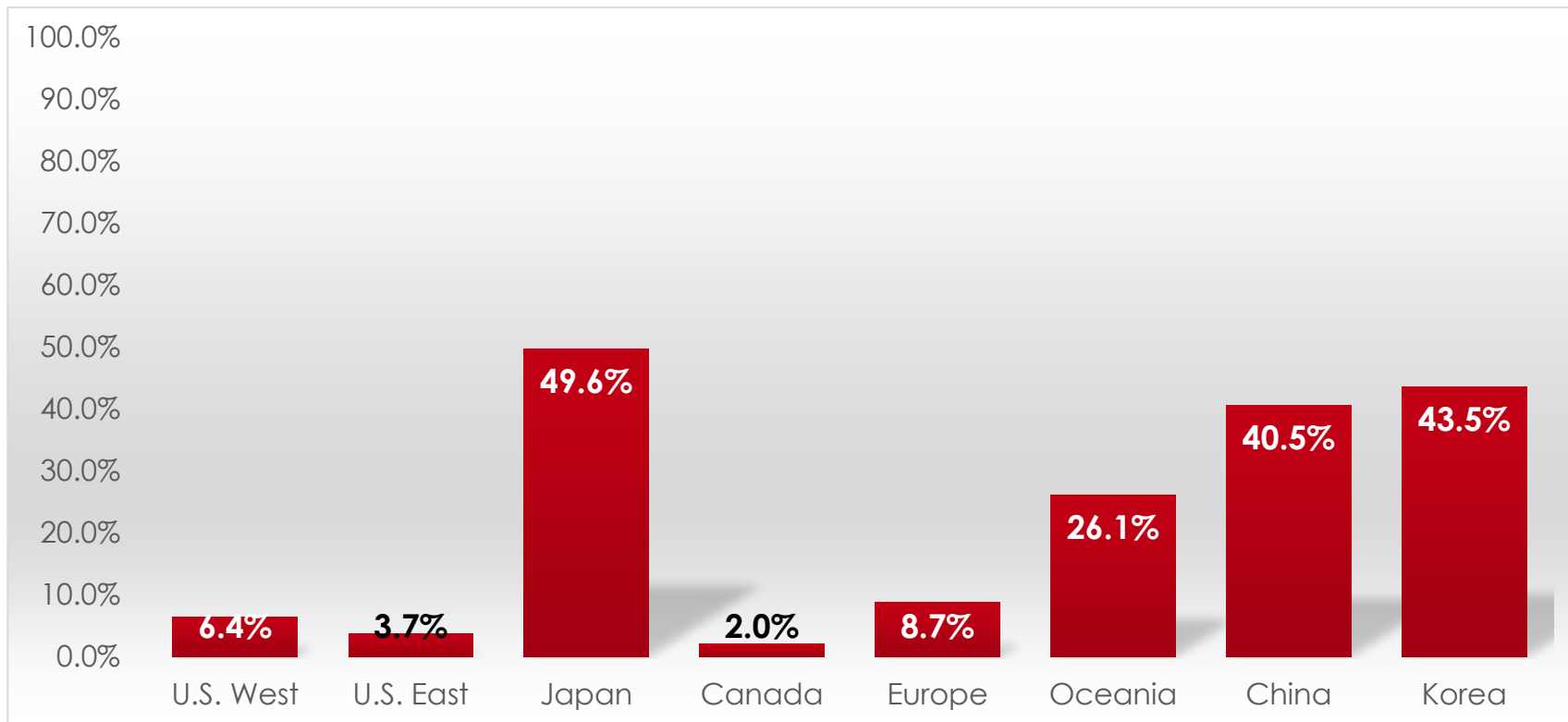
SECTION – ISLAND OF LANA'I

AIDED ADVERTISING AWARENESS – LANA'I



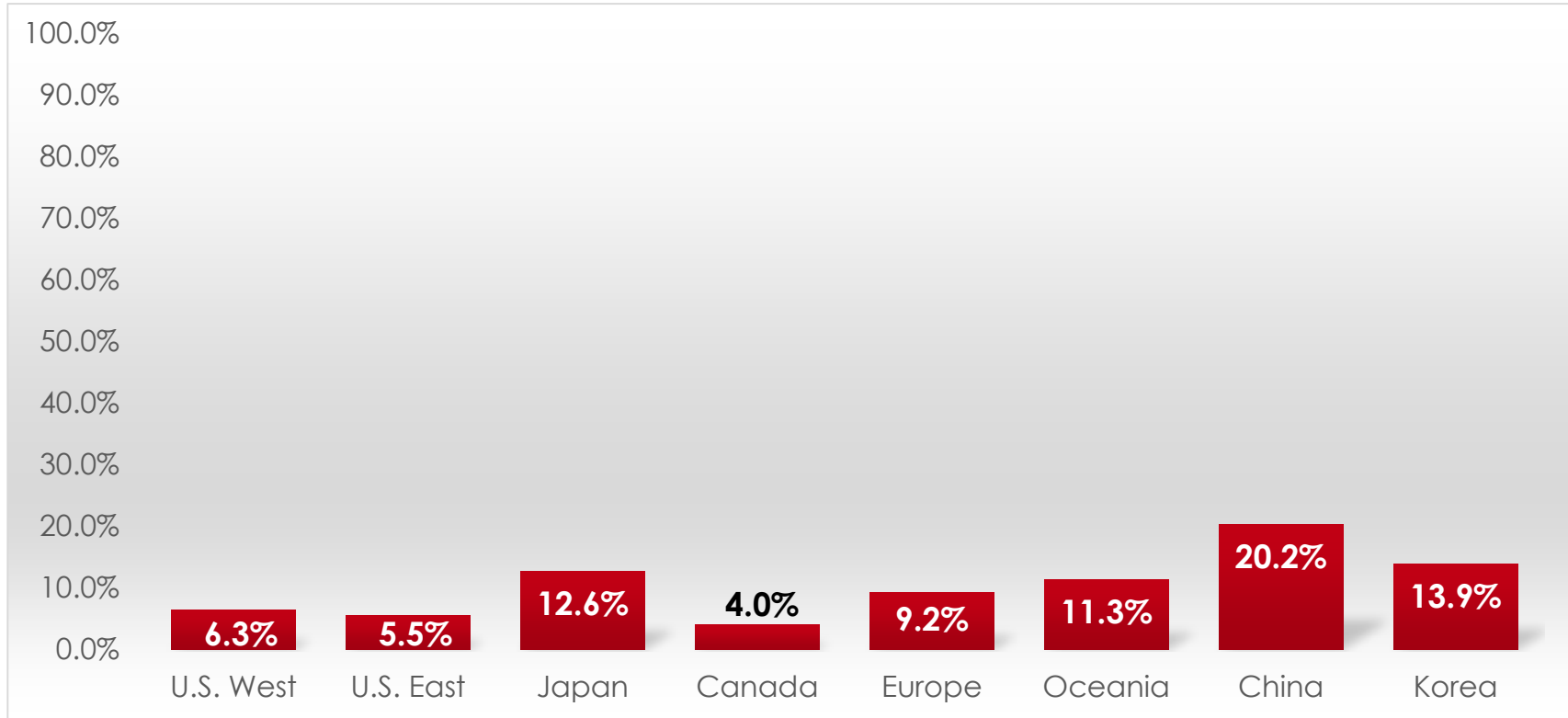
Sample sizes for Lānaʻi are relatively small.

IMPACT OF LOCATION FILMING— LANA'I



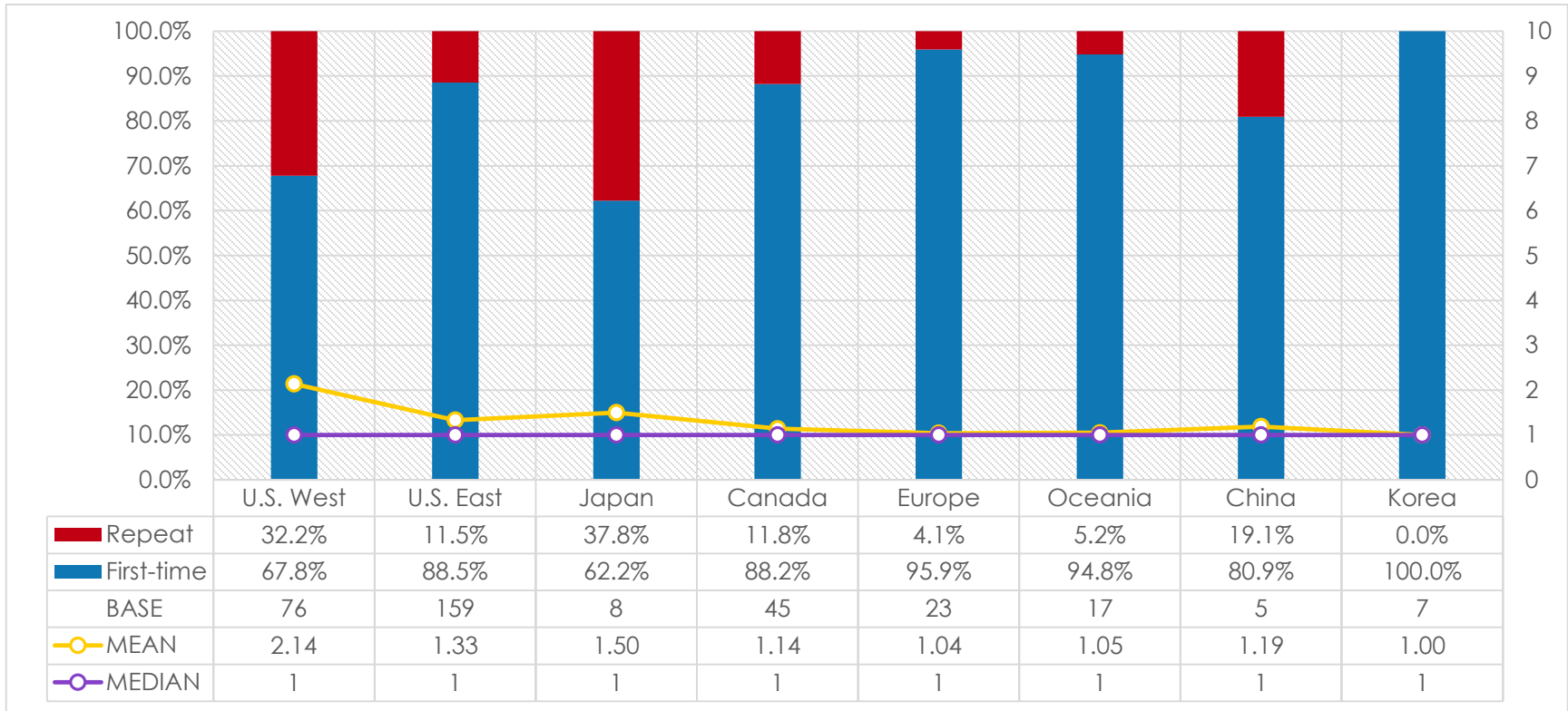
Sample sizes for Lānaʻi are relatively small.

IMPACT OF HAWAIIAN MUSIC – LANA'I



Sample sizes for Lānaʻi are relatively small.

1ST TIME VS REPEAT VISITOR –LANA'I



ACCOMMODATIONS – LANA'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Day trip | 43.7% | 38.7% | 12.6% | 54.8% | 33.6% | 11.8% | 0.0% | 0.0% |
| Hotel | 25.3% | 26.5% | 50.4% | 15.4% | 13.3% | 18.5% | 60.7% | 86.1% |
| Cruise ship | 8.6% | 26.0% | 0.0% | 19.4% | 40.9% | 71.1% | 20.2% | 13.9% |
| Friend/ relative | 9.2% | 3.1% | 0.0% | 4.4% | 0.0% | 10.4% | 0.0% | 0.0% |
| Campsite/ beach | 6.6% | 1.9% | 11.8% | 2.0% | 4.6% | 0.0% | 20.2% | 0.0% |

Sample sizes for Lāna'i are relatively small.

STRENGTHS/ POSITIVE ASPECTS – LANA'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Natural beauty | 25.2% | 17.8% | 12.6% | 17.8% | 21.9% | 39.3% | 0.0% | 14.8% |
| Beach/ ocean | 19.9% | 14.0% | 24.4% | 31.2% | 31.2% | 0.0% | 0.0% | 0.0% |
| Customer service | 16.1% | 15.2% | 12.6% | 11.4% | 4.6% | 0.0% | 20.2% | 0.0% |
| Activities- variety | 5.3% | 10.0% | 12.6% | 6.7% | 8.7% | 25.1% | 0.0% | 28.7% |
| Aloha spirit | 4.1% | 6.9% | 12.6% | 6.4% | 17.3% | 19.9% | 20.2% | 13.9% |
| Local culture | 4.1% | 7.5% | 0.0% | 6.7% | 4.1% | 5.2% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

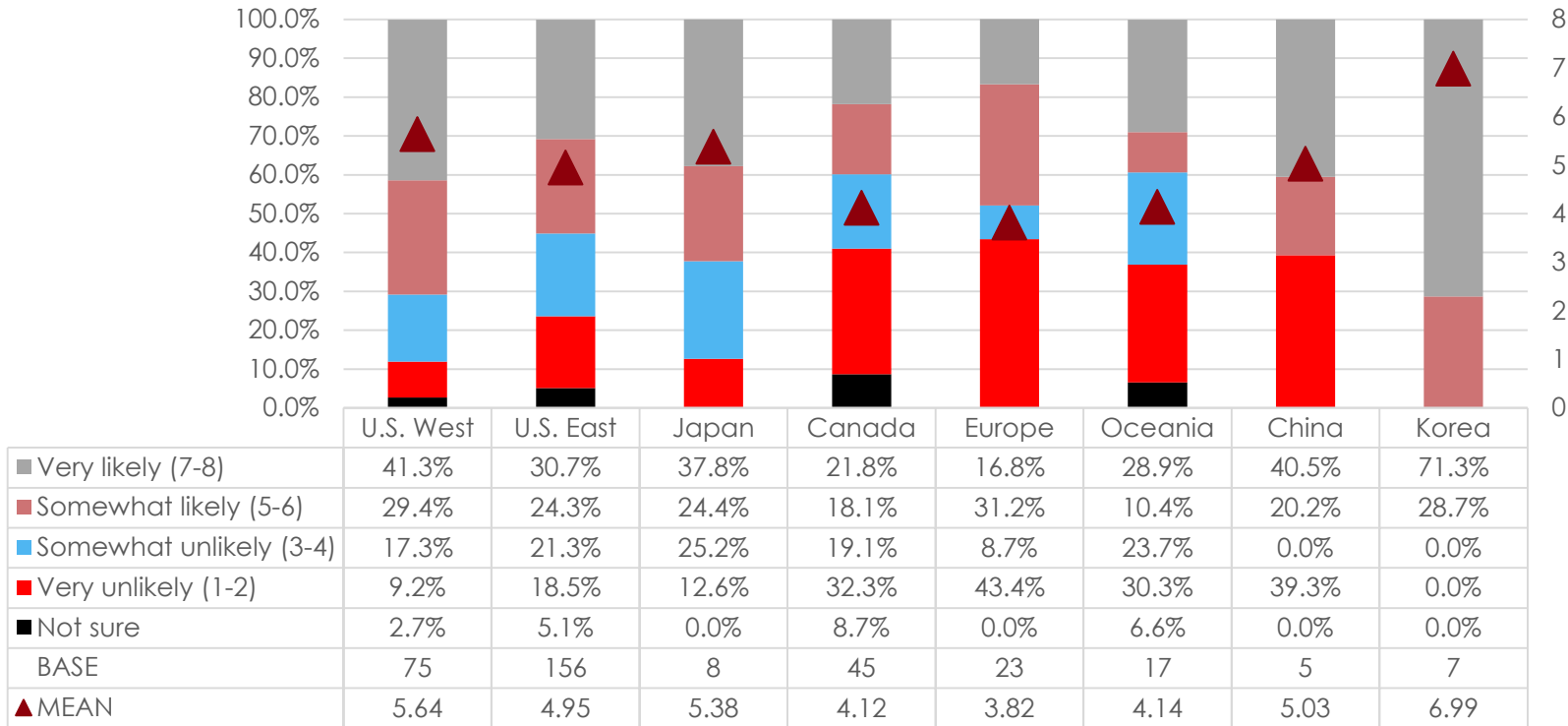
AREAS OF OPPORTUNITIES – LANA'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Nothing | 61.1% | 66.2% | 25.2% | 64.1% | 73.4% | 67.3% | 79.8% | 43.5% |
| Activities- variety | 5.4% | 7.0% | 12.6% | 2.0% | 0.0% | 5.2% | 0.0% | 41.8% |
| Food- variety | 8.1% | 3.8% | 25.2% | 6.7% | 4.6% | 0.0% | 0.0% | 14.8% |
| Ground transportation | 3.9% | 3.8% | 0.0% | 7.1% | 9.2% | 11.8% | 0.0% | 0.0% |
| Driving experience | 5.4% | 1.9% | 12.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Lack of local culture | 1.4% | 4.5% | 0.0% | 6.7% | 0.0% | 5.2% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LIKELIHOOD OF RETURN VISIT – LANAI

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



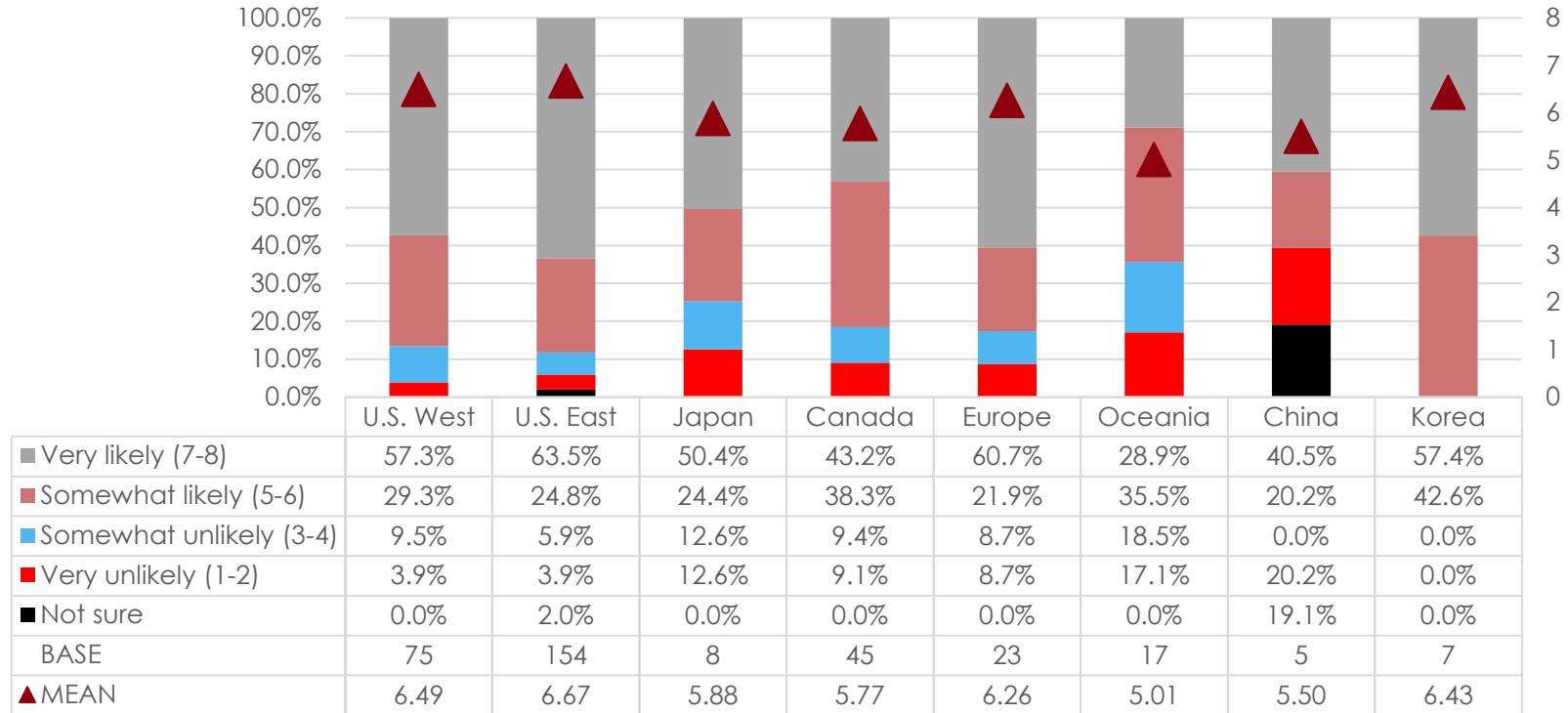
REASONS FOR NOT RETURNING – LANA'I

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Want to visit someplace new | 44.8% | 33.4% | 33.3% | 39.6% | 25.5% | 46.5% | 51.5% | 0.0% |
| No compelling reason to return | 23.2% | 26.3% | 33.3% | 24.5% | 7.8% | 19.3% | 0.0% | 0.0% |
| Too expensive | 13.9% | 24.5% | 33.3% | 17.9% | 8.8% | 0.0% | 0.0% | 0.0% |
| Flight too long | 0.0% | 20.1% | 0.0% | 3.5% | 25.5% | 34.2% | 48.5% | 0.0% |
| Nothing to do/ boring | 9.3% | 7.4% | 33.3% | 4.1% | 16.7% | 9.6% | 48.5% | 0.0% |
| Poor health/ Age | 0.0% | 8.7% | 0.0% | 0.0% | 7.8% | 0.0% | 0.0% | 0.0% |
| Value | 4.1% | 4.4% | 0.0% | 7.5% | 0.0% | 9.6% | 0.0% | 0.0% |
| Other financial obligations | 0.0% | 5.8% | 0.0% | 10.4% | 17.7% | 0.0% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - BRAND/DESTINATION – ADVOCACY

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



LANA'I - ACTIVITIES – SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------------------|-----------|-----------|-------|--------|--------|---------|--------|--------|
| TOTAL | 85.4% | 92.0% | 87.4% | 93.6% | 87.3% | 77.7% | 100.0% | 100.0% |
| On own (self-guided) | 34.8% | 29.0% | 62.2% | 39.6% | 21.9% | 5.2% | 80.9% | 86.1% |
| Helicopter/ airplane | 2.7% | 0.6% | 0.0% | 0.0% | 4.6% | 6.6% | 20.2% | 0.0% |
| Boat/ submarine/ whale | 25.2% | 30.3% | 0.0% | 28.5% | 39.8% | 18.5% | 40.5% | 27.8% |
| Visit towns | 32.3% | 34.3% | 25.2% | 31.6% | 26.0% | 13.3% | 40.5% | 0.0% |
| Limo/ van/ bus tour | 9.2% | 20.9% | 0.0% | 18.1% | 30.6% | 28.9% | 0.0% | 14.8% |
| Scenic views/ natural landmark | 35.7% | 52.0% | 0.0% | 22.1% | 35.2% | 31.8% | 79.8% | 28.7% |
| Movie/ TV/ film location | 1.2% | 0.0% | 0.0% | 2.0% | 0.0% | 13.3% | 20.2% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|--------|--------|--------|---------|--------|--------|
| TOTAL | 88.1% | 82.8% | 100.0% | 79.9% | 82.7% | 74.9% | 100.0% | 100.0% |
| Beach/ sunbathing | 70.9% | 59.9% | 74.8% | 51.0% | 61.8% | 18.5% | 80.9% | 56.5% |
| Bodyboard/ Standup paddle board | 2.7% | 2.0% | 0.0% | 0.0% | 4.6% | 0.0% | 20.2% | 0.0% |
| Surfing | 1.4% | 0.0% | 12.6% | 2.4% | 4.6% | 0.0% | 0.0% | 13.9% |
| Canoeing/ kayak | 2.6% | 2.0% | 0.0% | 0.0% | 4.6% | 0.0% | 0.0% | 0.0% |
| Swim- ocean | 57.6% | 42.1% | 25.2% | 42.3% | 22.5% | 5.2% | 20.2% | 86.1% |
| Snorkel | 44.0% | 38.8% | 0.0% | 39.9% | 21.4% | 5.2% | 0.0% | 43.5% |
| Windsurf/ Kitesurf | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| Jet ski/ Parasail | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| Scuba | 4.1% | 3.3% | 0.0% | 0.0% | 4.6% | 0.0% | 19.1% | 0.0% |
| Fishing | 2.7% | 4.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Golf | 8.1% | 6.0% | 0.0% | 4.4% | 4.1% | 0.0% | 19.1% | 28.7% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – RECREATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|--------|--------|--------|---------|--------|--------|
| TOTAL | 88.1% | 82.8% | 100.0% | 79.9% | 82.7% | 74.9% | 100.0% | 100.0% |
| Run/ Jog/ Fitness walk | 6.8% | 12.5% | 0.0% | 4.4% | 4.6% | 0.0% | 20.2% | 13.9% |
| Spa | 10.7% | 8.5% | 0.0% | 2.0% | 0.0% | 0.0% | 39.3% | 27.8% |
| Hiking/Backpack/Camp | 14.6% | 12.5% | 0.0% | 6.7% | 4.1% | 0.0% | 60.7% | 0.0% |
| Agritourism | 2.6% | 8.6% | 0.0% | 6.7% | 4.1% | 0.0% | 20.2% | 14.8% |
| Sport event/ tournament | 4.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Park/ botanical garden | 12.1% | 17.6% | 0.0% | 15.1% | 4.6% | 34.1% | 39.3% | 0.0% |
| Waterpark | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| Mountain tube/ waterfall rappel | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| Zip-lining | 1.4% | 1.3% | 0.0% | 0.0% | 0.0% | 5.2% | 19.1% | 13.9% |
| Skydiving | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| All terrain vehicle (ATV) | 6.6% | 5.3% | 0.0% | 2.4% | 4.1% | 6.6% | 20.2% | 28.7% |
| Horseback riding | 1.4% | 2.6% | 0.0% | 0.0% | 0.0% | 5.2% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|--------|
| TOTAL | 89.4% | 74.9% | 87.4% | 84.2% | 82.7% | 74.9% | 79.8% | 100.0% |
| Lunch/ sunset/ dinner/ evening cruise | 28.2% | 30.2% | 24.4% | 28.5% | 22.5% | 23.7% | 79.8% | 71.3% |
| Live music/ stage show | 5.3% | 5.9% | 12.6% | 2.4% | 4.6% | 10.4% | 0.0% | 13.9% |
| Nightclub/ dancing/ bar/ karaoke | 1.4% | 2.0% | 12.6% | 0.0% | 4.6% | 0.0% | 0.0% | 13.9% |
| Fine dining | 28.2% | 25.7% | 37.8% | 19.4% | 8.7% | 0.0% | 20.2% | 42.6% |
| Family restaurant | 21.3% | 14.5% | 0.0% | 10.0% | 13.3% | 18.5% | 20.2% | 27.8% |
| Fast food | 10.3% | 2.0% | 0.0% | 8.0% | 8.1% | 10.4% | 40.5% | 13.9% |
| Food truck | 1.2% | 1.9% | 0.0% | 4.7% | 0.0% | 0.0% | 39.3% | 28.7% |
| Café/ coffee house | 17.5% | 15.8% | 0.0% | 22.5% | 26.0% | 22.3% | 19.1% | 13.9% |
| Ethnic dining | 13.4% | 5.2% | 0.0% | 0.0% | 4.6% | 6.6% | 40.5% | 13.9% |
| Prepared own meal | 17.2% | 13.8% | 0.0% | 22.1% | 26.0% | 10.4% | 20.2% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|-------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 57.3% | 64.5% | 87.4% | 62.4% | 52.0% | 76.3% | 59.5% | 86.1% |
| Mall/ department store | 5.0% | 9.0% | 24.4% | 4.4% | 9.2% | 18.5% | 0.0% | 43.5% |
| Designer boutique | 7.8% | 4.6% | 0.0% | 6.4% | 4.6% | 5.2% | 0.0% | 0.0% |
| Hotel/ resort store | 18.7% | 16.6% | 12.6% | 11.4% | 4.1% | 17.1% | 39.3% | 13.9% |
| Swap meet/ flea market | 1.2% | 1.3% | 0.0% | 2.0% | 0.0% | 0.0% | 19.1% | 0.0% |
| Discount/ outlet store | 3.8% | 5.8% | 0.0% | 4.0% | 4.6% | 17.1% | 0.0% | 28.7% |
| Supermarket | 10.7% | 9.2% | 25.2% | 15.4% | 4.1% | 5.2% | 39.3% | 71.3% |
| Farmer's market | 9.4% | 5.9% | 0.0% | 4.4% | 4.6% | 10.4% | 20.2% | 13.9% |
| Convenience store | 11.6% | 12.5% | 0.0% | 12.7% | 4.6% | 23.7% | 19.1% | 13.9% |
| Duty free store | 0.0% | 3.3% | 25.2% | 0.0% | 0.0% | 0.0% | 0.0% | 13.9% |
| Local shop/ artisan | 29.3% | 31.5% | 0.0% | 28.9% | 34.7% | 28.9% | 0.0% | 27.8% |

Sample sizes for Lāna'i are relatively small.

LANA'I – HISTORY, CULTURE, FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 41.0% | 48.6% | 62.2% | 47.4% | 51.5% | 64.5% | 79.8% | 56.5% |
| Historic military site | 1.2% | 4.6% | 12.6% | 10.7% | 8.1% | 6.6% | 79.8% | 0.0% |
| Other historical site | 24.1% | 22.2% | 12.6% | 16.1% | 17.3% | 17.1% | 40.5% | 28.7% |
| Museum/ art gallery | 12.1% | 7.3% | 0.0% | 14.2% | 16.8% | 17.1% | 20.2% | 0.0% |
| Luau/ Polynesian show/ hula show | 3.8% | 14.3% | 12.6% | 8.4% | 17.9% | 10.4% | 20.2% | 28.7% |
| Lesson- ex. ukulele, hula, canoe, lei making | 1.4% | 0.7% | 12.6% | 0.0% | 4.6% | 0.0% | 40.5% | 0.0% |
| Play/ concert/ theatre | 2.7% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Art/ craft fair | 2.7% | 3.3% | 0.0% | 0.0% | 4.6% | 17.1% | 20.2% | 13.9% |
| Festival event | 3.9% | 7.3% | 11.8% | 9.1% | 4.1% | 13.3% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – TRANSPORTATION

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|---------------------------|-----------|-----------|--------|--------|--------|---------|-------|-------|
| TOTAL | 63.8% | 69.6% | 100.0% | 68.8% | 61.2% | 76.3% | 79.8% | 85.2% |
| Airport shuttle | 9.5% | 12.6% | 37.8% | 13.1% | 13.8% | 18.5% | 40.5% | 27.8% |
| Trolley | 0.0% | 1.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 13.9% |
| Public bus | 1.4% | 2.0% | 0.0% | 4.7% | 0.0% | 6.6% | 19.1% | 0.0% |
| Tour bus/ tour van | 25.0% | 27.5% | 11.8% | 22.9% | 36.3% | 40.8% | 0.0% | 70.5% |
| Taxi/ limo | 8.0% | 14.4% | 25.2% | 13.1% | 20.9% | 17.1% | 39.3% | 27.8% |
| Rental car | 21.3% | 14.6% | 12.6% | 14.7% | 4.1% | 11.8% | 59.5% | 28.7% |
| Ride share | 0.0% | 4.5% | 12.6% | 4.4% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bicycle rental | 1.4% | 0.0% | 0.0% | 0.0% | 4.6% | 0.0% | 0.0% | 0.0% |

Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – OTHER

| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|------------------------------|-----------|-----------|-------|--------|--------|---------|-------|-------|
| TOTAL | 12.2% | 11.8% | 24.4% | 8.7% | 4.1% | 5.2% | 39.9% | 0.0% |
| Visit friends/ family | 10.9% | 6.5% | 11.8% | 6.4% | 0.0% | 5.2% | 39.9% | 0.0% |
| Volunteer- non-profit | 1.4% | 5.3% | 12.6% | 2.4% | 4.1% | 0.0% | 0.0% | 0.0% |

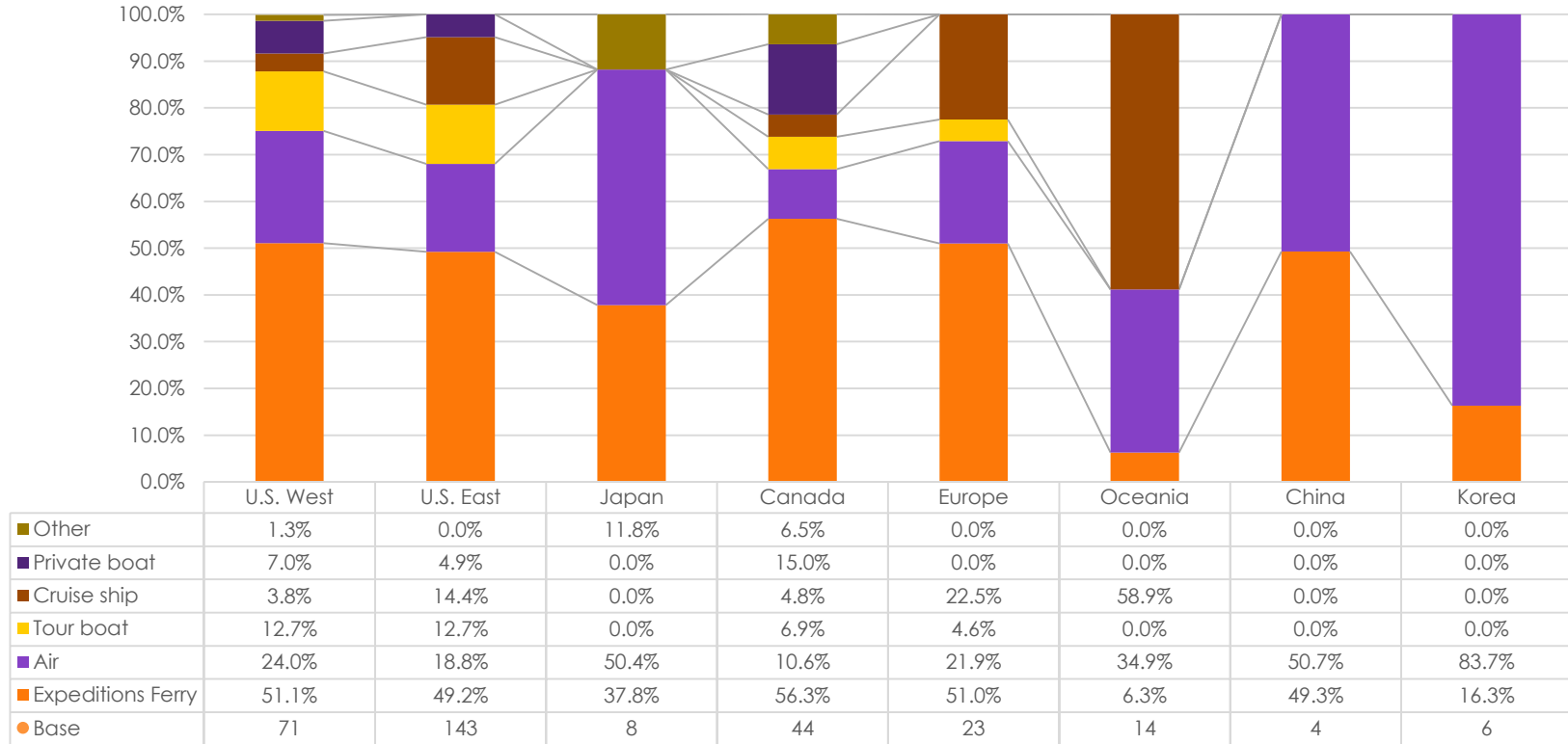
Sample sizes for Lāna'i are relatively small.

LANA'I - ACTIVITIES – ATTRACTIONS

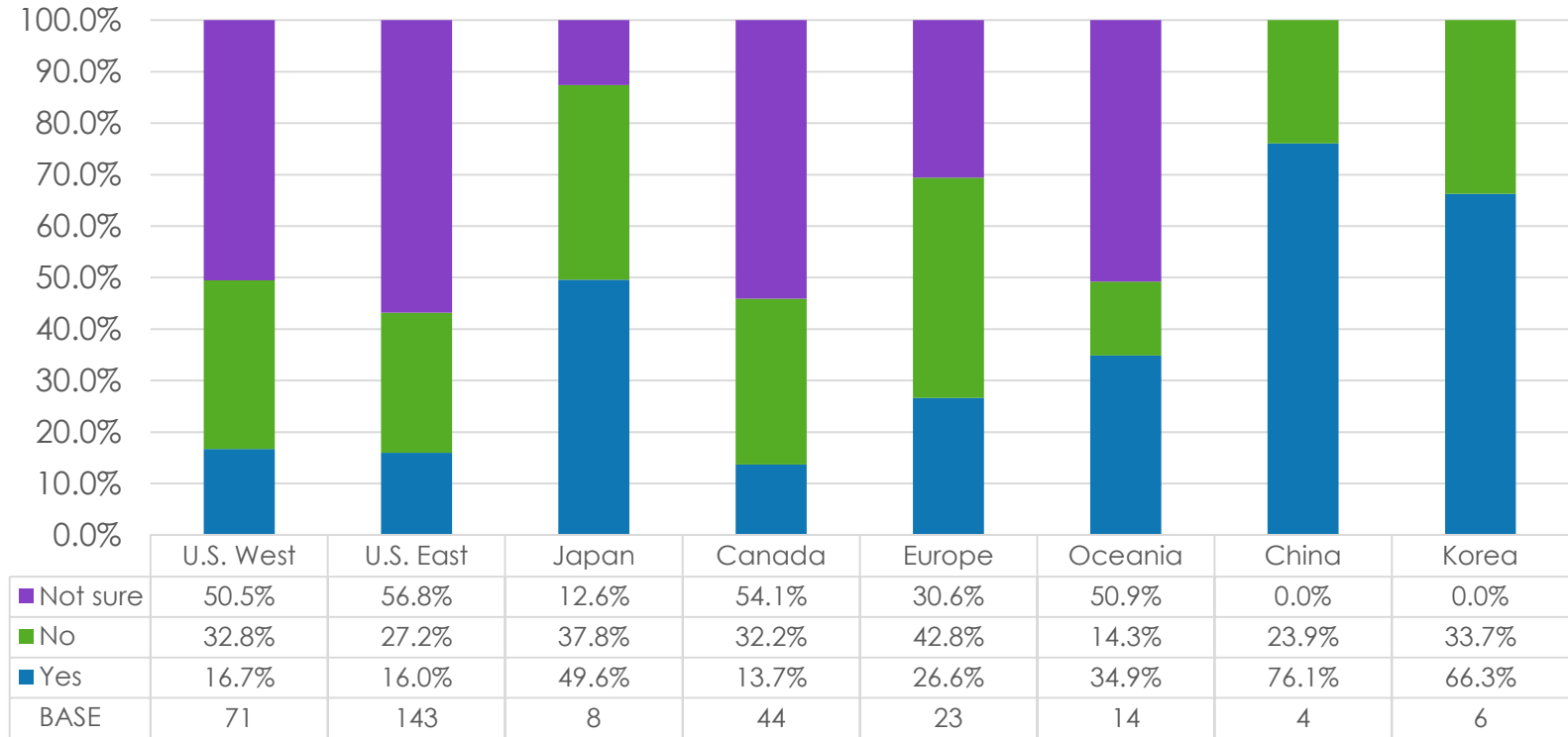
| | U.S. West | U.S. East | Japan | Canada | Europe | Oceania | China | Korea |
|--|-----------|-----------|-------|--------|--------|---------|-------|-------|
| Hawaiian Village at Kaunolu Fishing Village | 8.1% | 5.3% | 0.0% | 4.4% | 9.2% | 18.5% | 40.5% | 14.8% |
| Hulopoe Bay | 31.1% | 29.7% | 0.0% | 27.2% | 25.5% | 11.8% | 59.5% | 13.9% |
| Kaiolohia | 22.9% | 16.6% | 12.6% | 20.1% | 21.4% | 11.8% | 59.5% | 14.8% |
| Kanepuu Preserve | 5.3% | 5.3% | 25.2% | 0.0% | 17.9% | 5.2% | 0.0% | 0.0% |
| Keahiakawelo | 14.8% | 13.9% | 0.0% | 13.8% | 12.7% | 6.6% | 40.5% | 28.7% |
| Manele Golf Course | 10.9% | 8.0% | 12.6% | 13.4% | 4.1% | 0.0% | 0.0% | 14.8% |
| Munro Trail | 5.4% | 1.3% | 0.0% | 4.4% | 4.1% | 0.0% | 40.5% | 0.0% |
| Polihua Beach | 18.6% | 11.9% | 0.0% | 20.1% | 12.7% | 6.6% | 40.5% | 0.0% |
| Puu Pehe | 21.7% | 16.5% | 0.0% | 25.2% | 12.2% | 6.6% | 40.5% | 13.9% |

Sample sizes for Lāna'i are relatively small.

TRANSPORTATION TO LANA'I



AIRPORT VISITORS CENTER



SECTION – ISLAND SURVEY METHODOLOGY

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

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

| MMA | Completed | Margin of Error \pm |
|----------|-----------|-----------------------|
| US West | 3,315 | 1.70 |
| US East | 4,751 | 1.42 |
| Japan | 4,648 | 1.44 |
| Canada | 2,162 | 2.11 |
| Europe | 1,063 | 3.01 |
| Oceania | 2,139 | 2.12 |
| China | 729 | 3.63 |
| Korea | 1,472 | 2.55 |
| | | |
| All MMAs | 20,279 | .69 |

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

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

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

| MMA | Completed | Margin of Error \pm |
|-----------------|------------------|---|
| US West | 1,584 | 2.46 |
| US East | 2,023 | 2.18 |
| Japan | 51 | 13.72 |
| Canada | 1,087 | 2.97 |
| Europe | 403 | 4.88 |
| Oceania | 211 | 6.75 |
| China | 37 | 16.11 |
| Korea | 83 | 10.76 |
| | | |
| All MMAs | 5,479 | 1.32 |

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

| MMA | Completed | Margin of Error \pm |
|----------|-----------|-----------------------|
| US West | 2,719 | 1.88 |
| US East | 3,386 | 1.68 |
| Japan | 158 | 7.80 |
| Canada | 2,164 | 2.11 |
| Europe | 641 | 3.87 |
| Oceania | 350 | 5.24 |
| China | 165 | 7.63 |
| Korea | 300 | 5.66 |
| | | |
| All MMAs | 9,883 | .99 |

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MOLOKA'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 Maui.

| MMA | Completed | Margin of Error \pm |
|----------|-----------|-----------------------|
| US West | 71 | 11.87 |
| US East | 101 | 9.95 |
| Japan | 3 | 56.58 |
| Canada | 34 | 16.81 |
| Europe | 27 | 9.62 |
| Oceania | 15 | 25.30 |
| China | 7 | 37.04 |
| Korea | 9 | 32.67 |
| | | |
| All MMAs | 267 | 6.00 |

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

METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (LANA'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 Maui.

| MMA | Completed | Margin of Error \pm |
|----------|-----------|-----------------------|
| US West | 85 | 10.63 |
| US East | 186 | 7.19 |
| Japan | 8 | 34.65 |
| Canada | 50 | 13.86 |
| Europe | 26 | 19.22 |
| Oceania | 26 | 19.22 |
| China | 5 | 43.83 |
| Korea | 8 | 34.65 |
| | | |
| All MMAs | 394 | 4.94 |

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

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

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

| MMA | Completed | Margin of Error \pm |
|----------|-----------|-----------------------|
| US West | 2,198 | 2.09 |
| US East | 2,415 | 1.99 |
| Japan | 1,202 | 2.83 |
| Canada | 1,526 | 2.51 |
| Europe | 520 | 4.30 |
| Oceania | 271 | 5.95 |
| China | 257 | 6.11 |
| Korea | 254 | 6.15 |
| | | |
| All MMAs | 8,643 | 1.05 |

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