

Visitor Satisfaction Study

Q4 2019

Prepared for:
Hawai'i Tourism Authority

METHODOLOGY – OVERALL

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

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	2,495	1.96	17.59%
U.S. East	2,269	2.06	15.19%
Japan	1,853	2.28	26.12%
Canada	1,732	2.35	77.32%
Europe	4,14	4.82	21.18%
Oceania	522	4.29	24.13%
China	623	3.93	45.41%
Korea	398	4.91	35.07%
All MMAs	10,306	0.97	22.86%

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

METHODOLOGY – OVERALL (cont.)

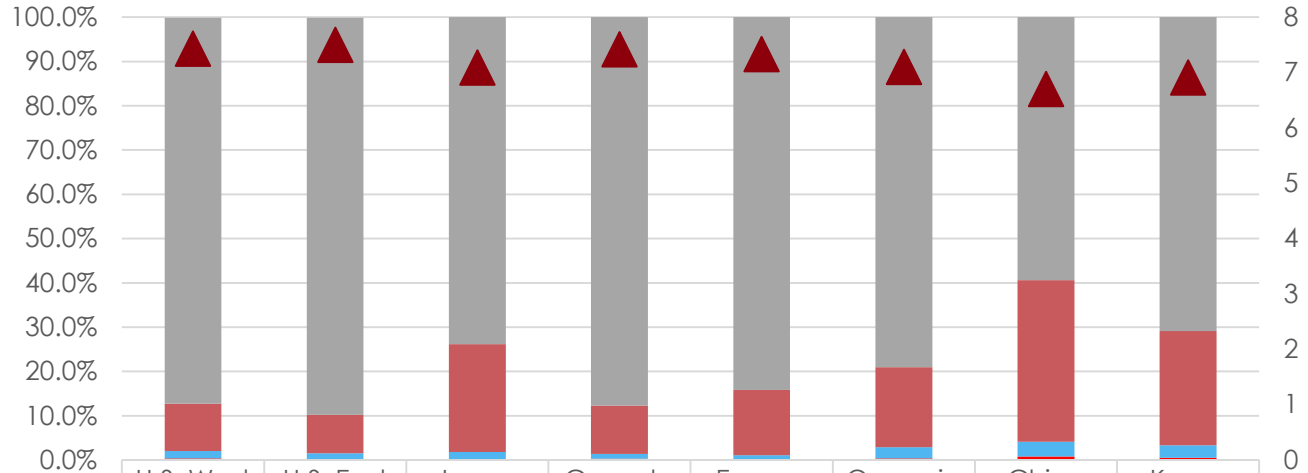
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also 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 2019 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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Extremely satisfied (7-8)	87.2%	89.7%	73.8%	87.7%	84.2%	79.0%	59.4%	70.9%
■ Somewhat satisfied (5-6)	10.7%	8.7%	24.4%	10.9%	14.7%	18.1%	36.5%	25.8%
■ Somewhat dissatisfied (3-4)	1.6%	1.4%	1.8%	1.1%	1.1%	2.5%	3.3%	2.8%
■ Not at all satisfied (1-2)	0.4%	0.1%	0.0%	0.3%	0.0%	0.4%	0.8%	0.5%
BASE	2,495	2,269	1,853	1,732	414	522	623	398
▲ MEAN	7.43	7.50	7.09	7.42	7.33	7.10	6.70	6.91

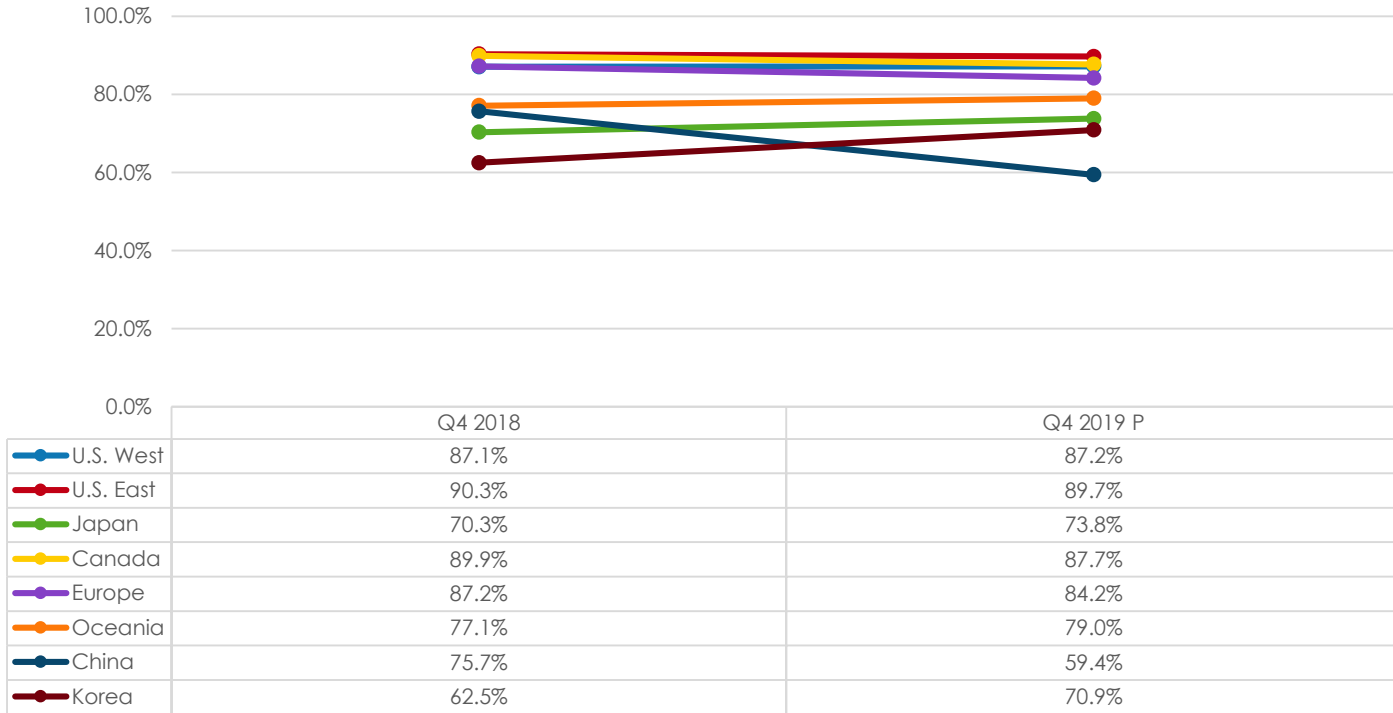
OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN RATINGS

- **Visited single island vs. Multi-Island visit:** Visitors from China who visited multiple islands during their trip to Hawai'i were more satisfied overall than those visiting a single island from these particular visitor markets.
- **Gender:** Female travelers from the following visitor markets were more satisfied than their male counterparts: U.S. West and U.S. East.
- **Age:** Among Japanese visitors, seniors tended to be the least satisfied with their trip.

OVERALL SATISFACTION – MOST RECENT VISIT

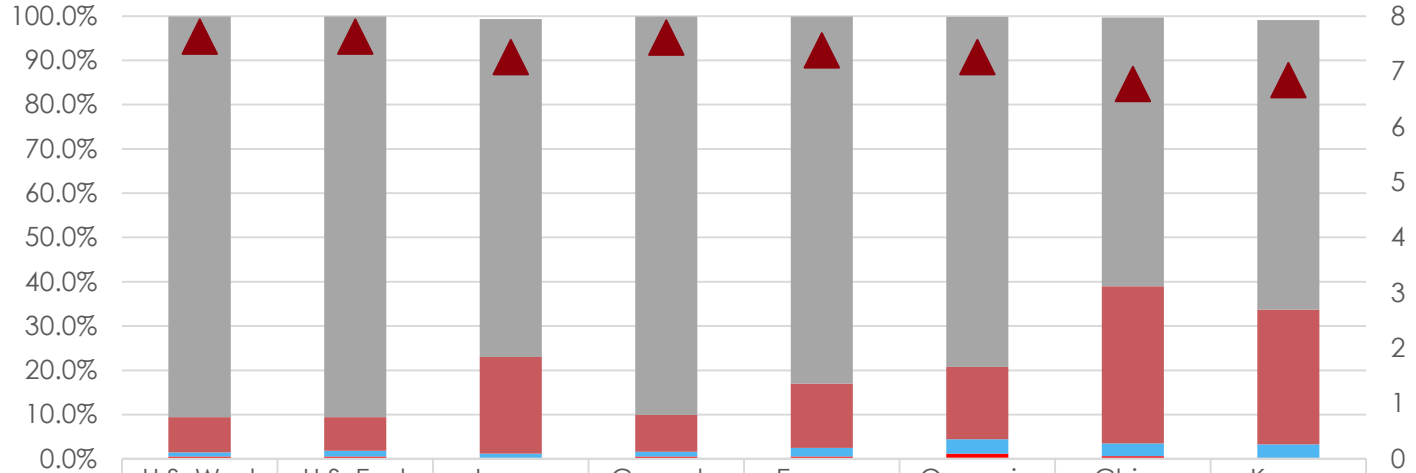
8-pt Rating Scale
8=Extremely Satisfied / 1=Not Satisfied at All



P= Preliminary Data

BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	90.5%	90.5%	76.3%	90.0%	82.9%	79.0%	60.7%	65.4%
■ Somewhat likely (5-6)	7.9%	7.6%	21.8%	8.3%	14.5%	16.4%	35.5%	30.4%
■ Somewhat unlikely (3-4)	1.0%	1.3%	1.1%	1.1%	2.0%	3.2%	2.9%	3.3%
■ Very unlikely (1-2)	0.5%	0.5%	0.1%	0.5%	0.5%	1.2%	0.6%	0.0%
BASE	2,495	2,269	1,853	1,732	414	522	623	398
▲ MEAN	7.63	7.63	7.26	7.61	7.38	7.26	6.77	6.84

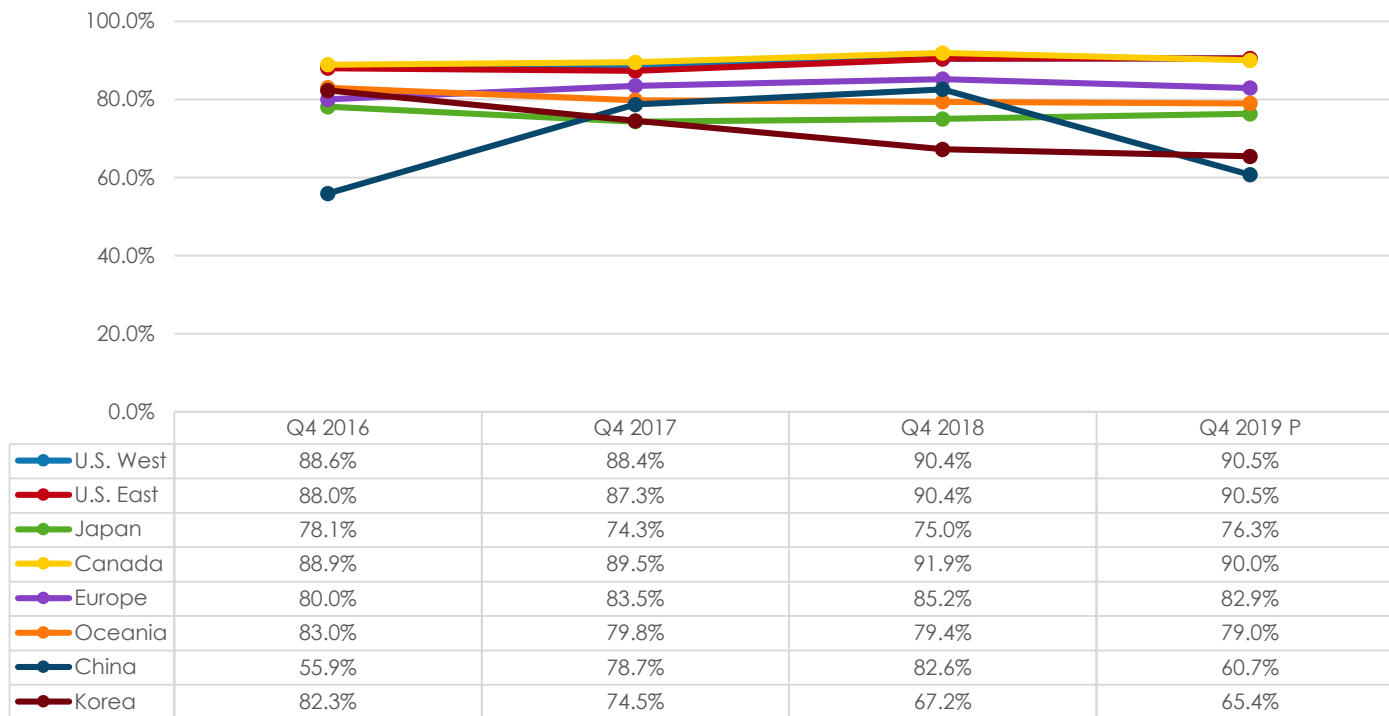
BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES

- **First-time vs. Repeat:** Repeat visitors from Japan and U.S. West are more likely to recommend Hawai'i to others than were first-time visitors from these markets.
- **Visited single island vs. Multi-Island visit:** Visitors from China who visited multiple islands during their trip to Hawai'i were more likely to recommend the state than were those who visited a single island during this stay.
- **Gender:** Female travelers from the following visitor markets were more likely to recommend Hawai'i as a destination than their male counterparts: U.S. West, U.S. East, and Japan.
- **Age:** Among travelers from Japan, seniors are the least likely to recommend Hawai'i to others.
- **Travel party size:** Among visitors from the U.S. West and U.S. East, those who are traveling alone are the least likely to be brand advocates for the state.

BRAND/DESTINATION – ADVOCACY

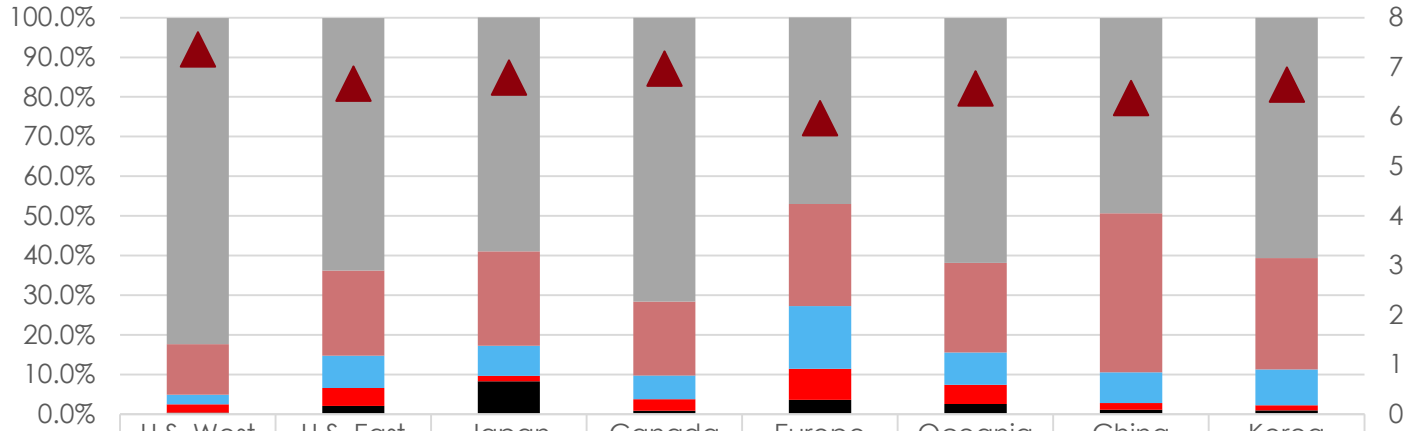
TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	82.2%	63.7%	59.0%	71.6%	47.1%	61.7%	49.2%	60.6%
■ Somewhat likely (5-6)	12.8%	21.4%	23.8%	18.6%	25.7%	22.6%	40.1%	28.1%
■ Somewhat unlikely (3-4)	2.4%	8.2%	7.6%	6.0%	15.8%	8.2%	7.8%	9.0%
■ Very unlikely (1-2)	2.1%	4.5%	1.4%	2.9%	7.9%	4.8%	1.7%	1.3%
■ Not Sure	0.4%	2.1%	8.3%	0.9%	3.6%	2.6%	1.1%	1.0%
BASE	2,495	2,269	1,853	1,732	414	522	623	398
▲ MEAN	7.36	6.67	6.79	6.97	5.97	6.57	6.38	6.65

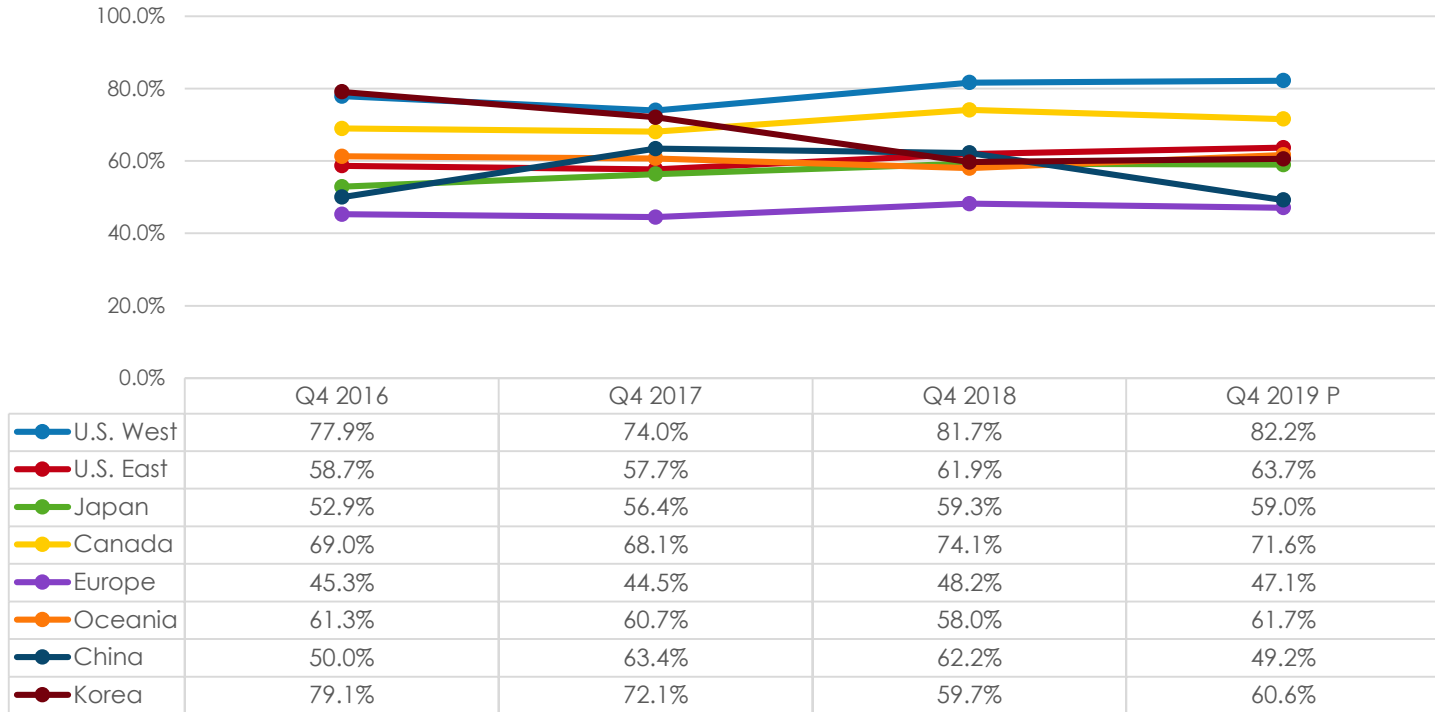
LIKELIHOOD OF RETURN VISIT

COMPARISON OF MEAN SCORES

- **First-time vs. Repeat:** Repeat visitors from the following visitor markets expressed a greater likelihood to return to Hawai'i than first-time visitors: U.S. West, U.S. East, Japan, Canada, Europe, China, and Oceania.
- **Visited single island vs. Multi-Island visit:** Travelers from the following visitor markets who visited a single island during their trip express a greater likelihood to return to Hawai'i: U.S. West, U.S. East, Canada, Europe, and Oceania.
- **Age:** Younger visitors from Japan and U.S. West, under the age of 35, are the least likely travelers from this visitor market to indicate a return visit.
- **Travel party size:** Those who are traveling alone from U.S. West and U.S. East express a stronger desire to return in the next five years compared to visitors from these markets in larger travel parties.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q4 2018	Q4 2019 P
41.9% Too expensive	46.0% Too expensive
32.3% Want to go someplace new	41.1% Want to go someplace new
22.3% Poor value	23.4% Too crowded/ congested/ traffic
18.9% Too crowded/ congested/ traffic	17.7% Too commercialized/ overdeveloped
17.1% Flight is too long	16.9% Poor value
16.3% Too commercialized/ overdeveloped	12.9% Flight too long
14.9% No reason to return/ nothing new	12.1% Other financial obligations
13.3% Five years is too soon	10.5% No reason to return/ nothing new
13.1% Other financial obligations	10.5% Five years is too soon
11.1% Unfriendly people/ unwelcome	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q4 2018	Q4 2019 P
47.2% Too expensive	48.7% Too expensive
44.9% Want to go someplace new	45.5% Flight is too long
40.4% Flight is too long	39.0% Want to go someplace new
18.7% Five years is too soon	16.9% Five years is too soon
14.4% Other financial obligations	14.7% Poor value
13.3% Too crowded/ congested/ traffic	11.1% Other financial obligations
13.2% Poor value	11.0% Too crowded/ congested/ traffic
12.8% No reason to return/ nothing new	10.3% No reason to return/ nothing new
11.1% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q4 2018	Q4 2019 P
42.0% Too expensive	36.2% Other financial obligations
31.5% Want to go someplace new	34.8% Too expensive
26.5% Other financial obligations	27.6% Want to go someplace new
25.9% Flight is too long	27.4% Five years is too soon
22.3% Five years is too soon	25.3% Flight is too long
10.1% No reason/ nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CANADA

Q4 2018	Q4 2019 P
57.6% Too expensive	58.8% Too expensive
48.3% Want to go someplace new	51.8% Want to go someplace new
35.1% Flight is too long	33.7% Flight is too long
24.6% Five years is too soon	20.8% Poor value
14.0% Other financial obligations	20.4% Five years is too soon
13.1% Too crowded/ congested/ traffic	16.7% Too commercialized
12.7% Poor value	12.7% Too crowded/ congested/ traffic
10.1% No reason to return/ nothing new	11.8% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS EUROPE

Q4 2018	Q4 2019 P
55.8% Flight is too long	57.7% Flight is too long
52.8% Want to go someplace new	43.6% Too expensive
50.1% Too expensive	42.2% Want to go someplace new
18.4% Other financial obligations	24.0% Five years is too soon
17.1% Too commercialized/ overdeveloped	13.8% Too commercialized/ overdeveloped
16.9% Five years is too soon	12.8% Other financial obligations
16.9% Poor value	12.8% Poor value
11.4% Unfriendly people/ felt unwelcomed	

P= Preliminary Data



UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q4 2018	Q4 2019 P
41.3% Too expensive	45.5% Too expensive
39.6% Want to go someplace new	43.3% Want to go someplace new
35.4% Poor value	28.3% Poor value
24.2% Too commercialized/ overdeveloped	25.6% Too crowded/ congested/ traffic
18.7% Too crowded/ congested/ traffic	24.2% Too commercialized/ overdeveloped
16.7% No reason to return/ nothing new	20.3% Five years is too soon
14.1% Flight is too long	16.1% No reason to return/ nothing new
10.8% Five years is too soon	11.9% Flight is too long
	10.0% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CHINA

Q4 2018	Q4 2019 P
60.3% Flight is too long	53.8% Want to go someplace new
49.7% Too expensive	42.0% Too expensive
30.2% Poor value	39.1% Flight too long
30.2% No reason to return/ Nothing new	35.9% Poor value
29.6% Five years is too soon	35.9% Five years is too soon
20.1% Want to go someplace new	26.7% No reason to return/ nothing new
20.1% Other financial obligations	
10.1% Too commercialized/ overdeveloped	

P= Preliminary Data

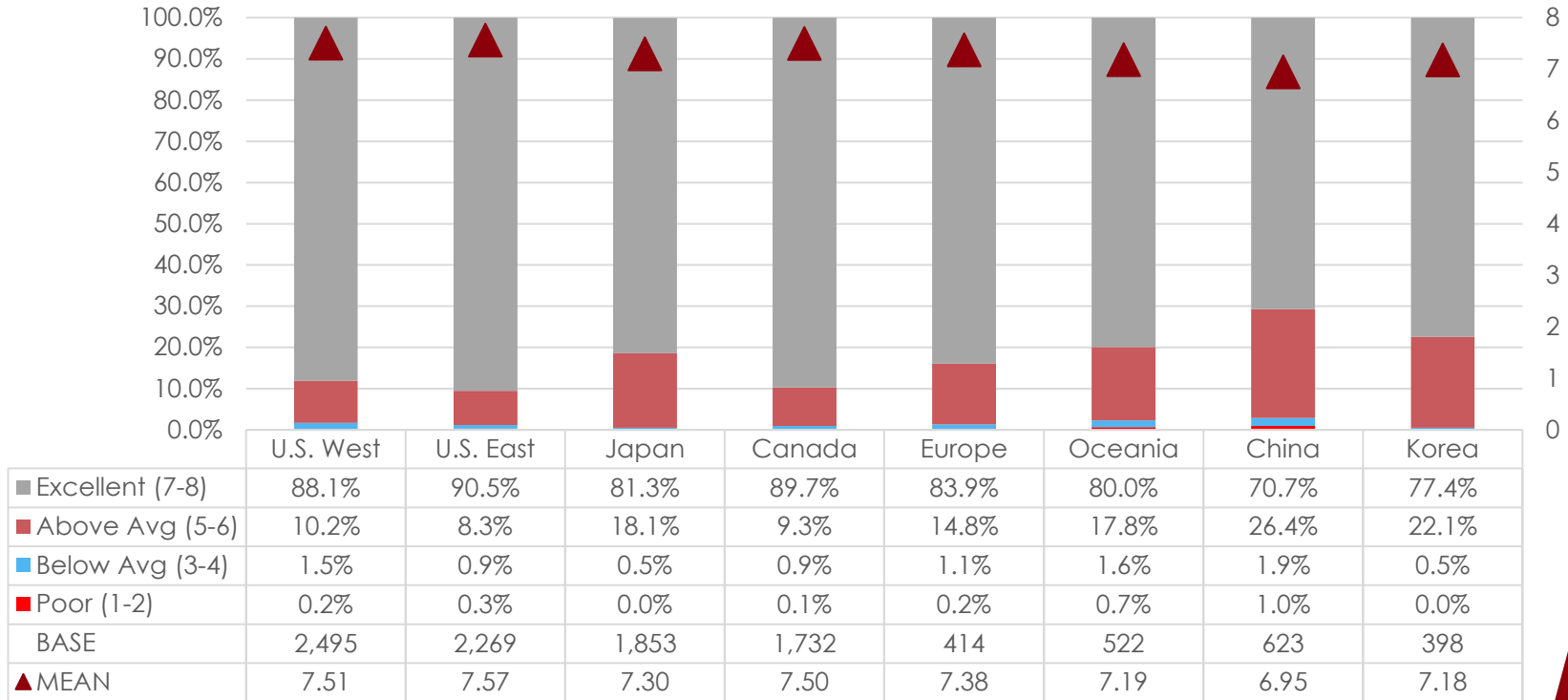
UNLIKELY TO RETURN – TOP REASONS KOREA

Q4 2018	Q4 2019 P
60.1% Too expensive	64.3% Too expensive
37.0% Five years is too soon	44.5% Flight is too long
28.5% Poor value	42.3% Poor value
25.3% No reason to return/ Nothing new	20.2% No reason to return/ Nothing new
20.2% Other financial obligations	18.2% Unfriendly people/ felt unwelcome
17.0% Flight is too long	17.8% Other financial obligations
14.4% Unfriendly people/ felt unwelcome	17.8% Five years is too soon
14.3% Want to go someplace new	15.6% Too commercialized/ overdeveloped
11.4% Too commercialized/ overdeveloped	13.2% Too crowded/ congested

P= Preliminary Data

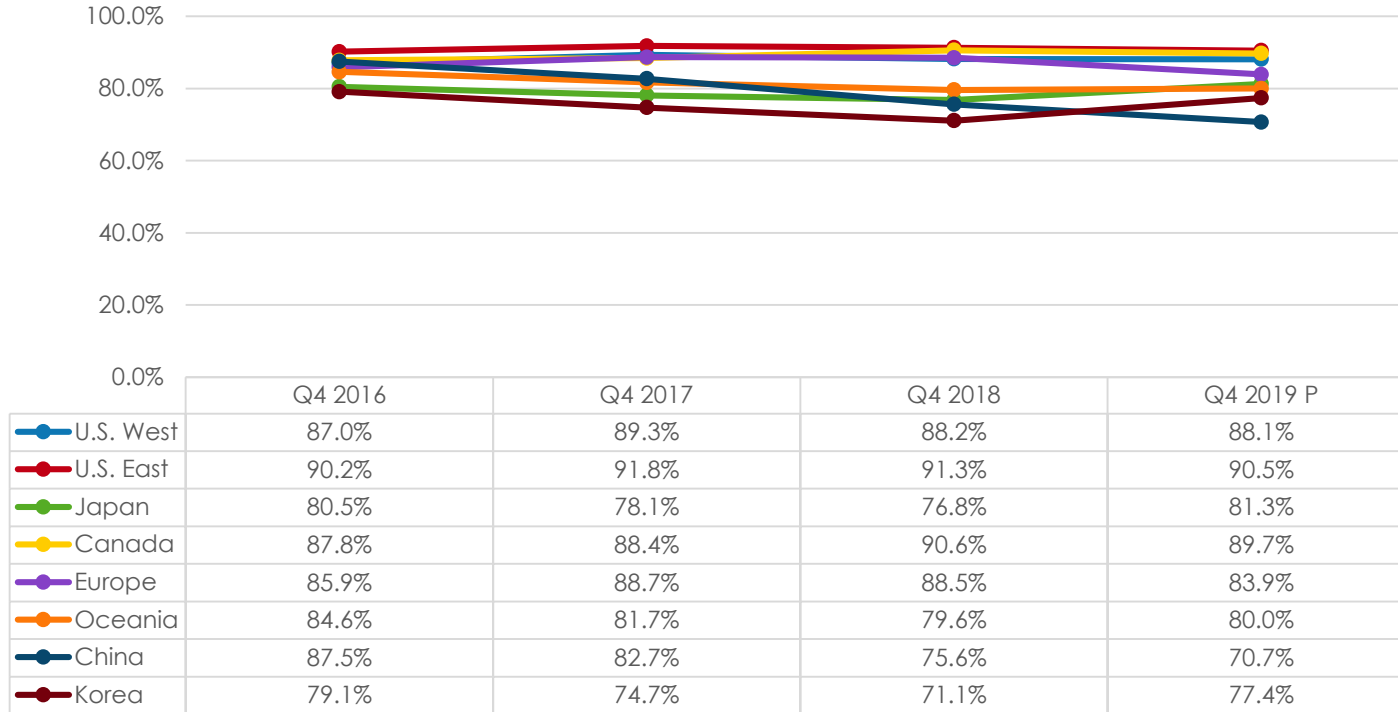
SATISFACTION – STATE OF HAWAI‘I BY MMA

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



SATISFACTION – STATE OF HAWAI‘I BY MMA

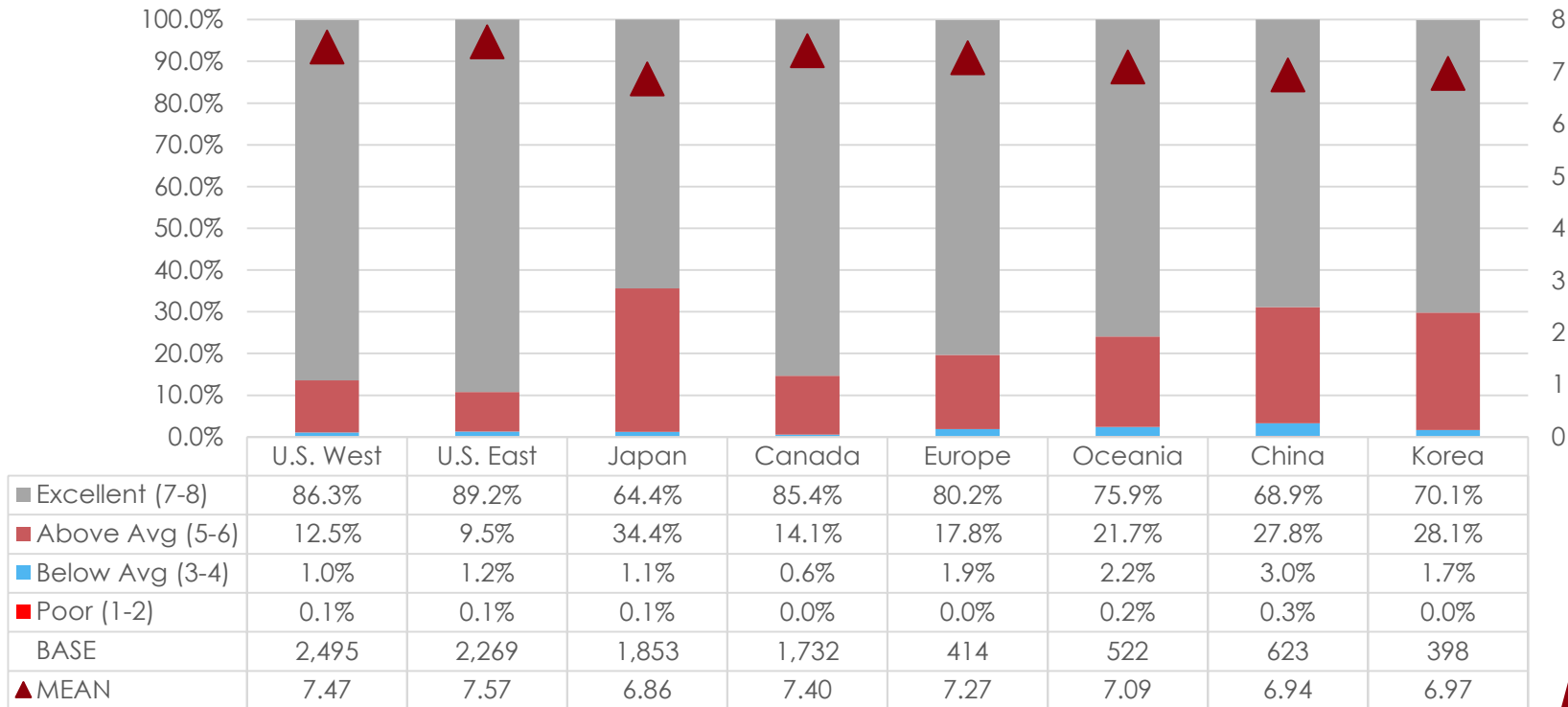
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

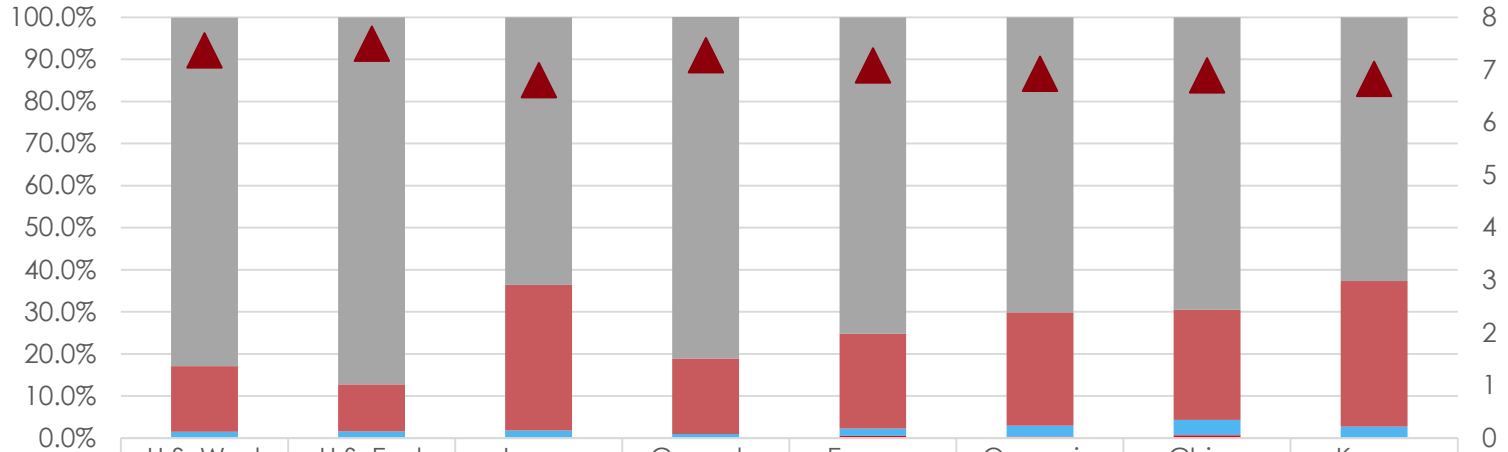
OFFERING A VARIETY OF EXPERIENCES

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



NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

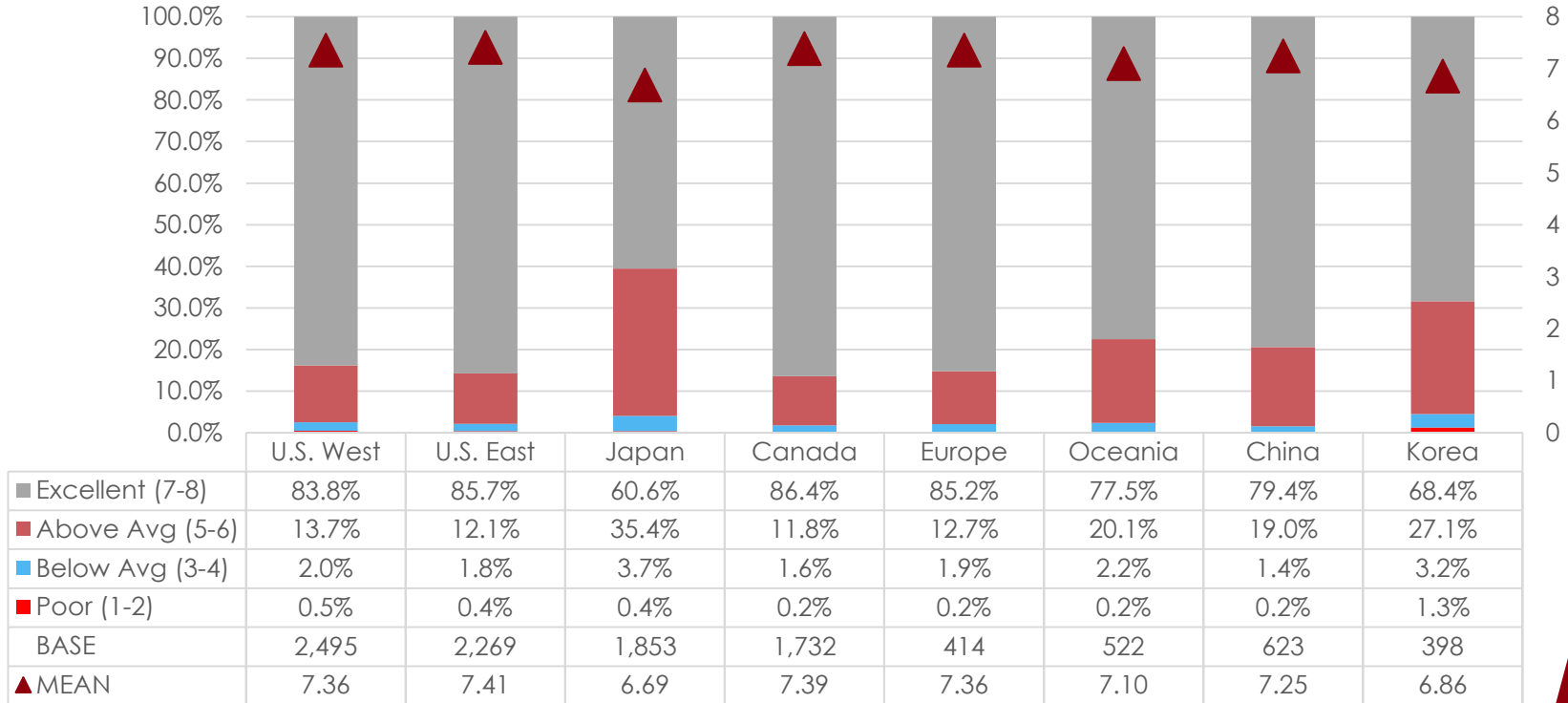
8-pt Rating Scale
8=Excellent / 1=Poor



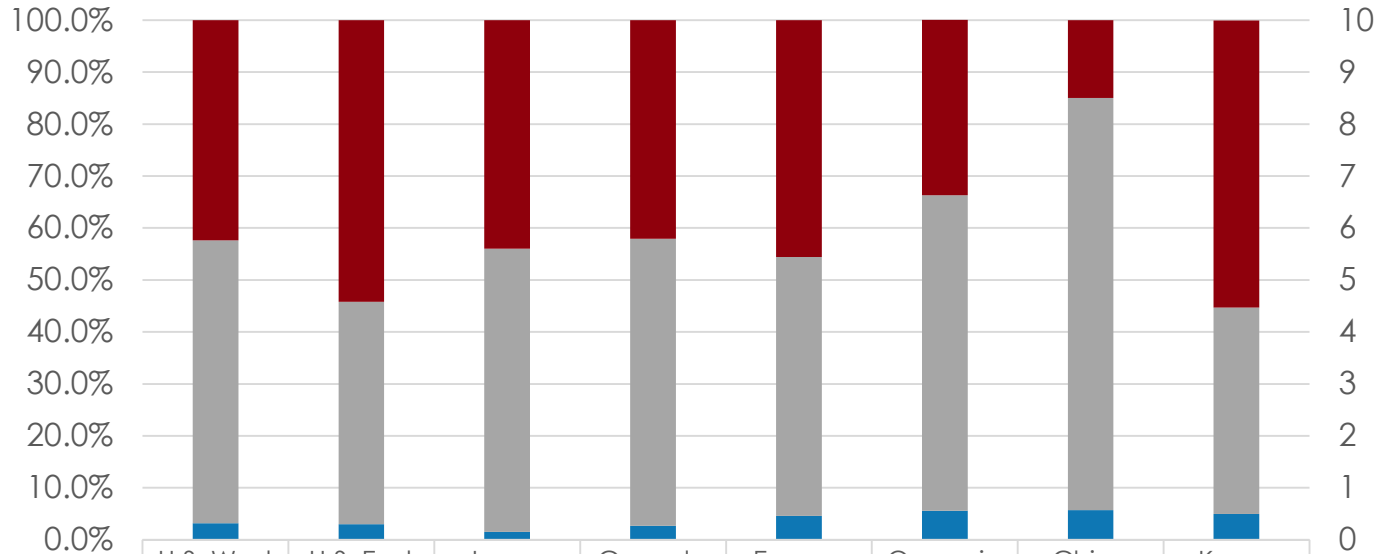
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	82.8%	87.2%	63.6%	81.2%	75.2%	70.1%	69.5%	62.7%
■ Above Avg (5-6)	15.6%	11.2%	34.6%	17.9%	22.5%	26.9%	26.2%	34.6%
■ Below Avg (3-4)	1.4%	1.5%	1.8%	1.0%	1.8%	2.6%	3.6%	2.7%
■ Poor (1-2)	0.1%	0.1%	0.0%	0.0%	0.5%	0.4%	0.7%	0.0%
BASE	2,495	2,269	1,853	1,732	414	522	623	398
▲ MEAN	7.37	7.50	6.81	7.28	7.09	6.93	6.90	6.83

BEING A SAFE AND SECURE DESTINATION

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



SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Exceeded expectations	42.4%	54.2%	44.0%	42.1%	45.6%	33.8%	15.0%	55.2%
Met expectations	54.4%	42.8%	54.5%	55.2%	49.8%	60.7%	79.3%	39.7%
Did NOT meet expectations	3.2%	3.0%	1.5%	2.7%	4.6%	5.6%	5.7%	5.0%
BASE	2,495	2,269	1,853	1,732	414	522	623	398

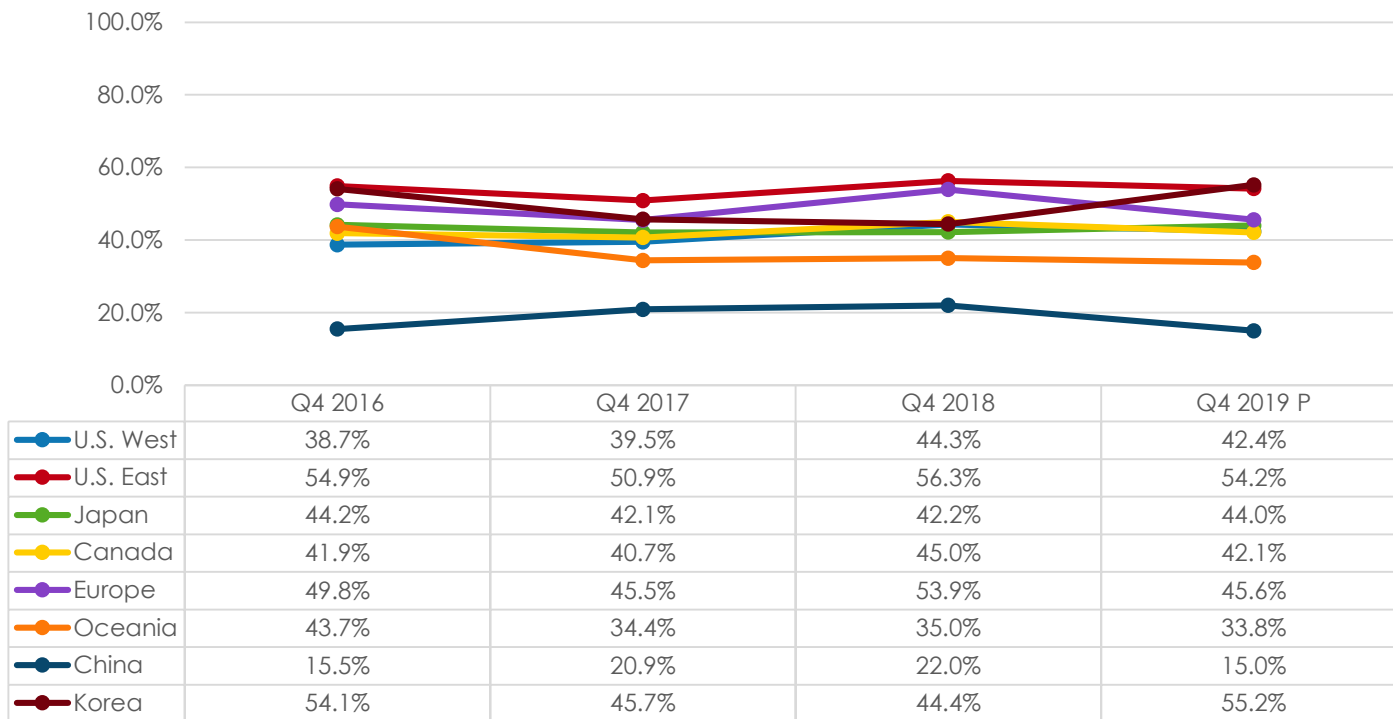
SATISFACTION – HAWAI'I TRIP EXPECTATIONS

COMPARISON OF MEAN SCORES

- **First-time vs. Repeat:** A higher percentage of first-time visitors from U.S. West, U.S. East, Japan, Canada, and Oceania indicated that the trip exceeded their expectations compared to repeat visitors from these markets.
- **Islands Visited:** A higher percentage of visitors from U.S. West and U.S. East who went to multiple islands said the trip exceeded their expectations compared to travelers from these markets who visited a single island.
- **Age:** Younger travelers from U.S. West, U.S. East, Japan, and Oceania were more satisfied with their trip in terms of expectations than older visitors from these markets.
- **Gender:** Female travelers from U.S. West, U.S. East, and Canada were more likely to agree that their trip exceeded expectations compared to male visitors from these markets.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



P= Preliminary Data

SECTION – ACTIVITIES

ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	94.8%	96.6%	95.1%	95.4%	94.8%	92.1%	95.6%	97.3%
On own (self-guided)	82.9%	81.2%	63.8%	84.5%	73.8%	48.2%	53.8%	76.2%
Helicopter/ airplane	5.9%	10.8%	2.1%	7.5%	11.3%	6.5%	17.0%	2.8%
Boat/ submarine/ whale	22.1%	29.2%	10.4%	23.1%	21.0%	15.0%	22.7%	20.0%
Visit towns/communities	54.1%	53.4%	28.9%	57.4%	42.0%	29.4%	24.2%	27.5%
Limo/ van/ bus tour	8.0%	16.3%	22.0%	8.9%	15.6%	30.0%	13.0%	19.3%
Scenic views/ natural landmark	58.7%	65.0%	17.4%	62.3%	60.9%	51.1%	43.7%	57.2%
Movie/ TV/ film location	4.1%	5.3%	4.8%	4.0%	6.6%	10.5%	23.9%	19.3%

ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.1%	95.8%	95.1%	98.4%	97.4%	94.1%	94.0%	98.8%
Beach/ sunbathing	81.6%	80.5%	65.9%	89.7%	81.4%	77.9%	66.8%	68.9%
Bodyboard/ Standup paddle board	11.5%	7.7%	2.2%	15.7%	11.2%	9.5%	2.8%	5.3%
Surfing	6.0%	5.1%	2.2%	8.3%	11.1%	7.7%	6.6%	13.6%
Canoeing/ kayak	6.3%	5.6%	1.5%	5.5%	5.8%	3.5%	3.3%	11.3%
Swim in the ocean	63.9%	62.4%	29.2%	76.2%	66.4%	64.4%	33.0%	42.4%
Snorkel	43.7%	38.6%	16.4%	53.2%	42.5%	29.2%	22.0%	52.8%
Windsurf/ Kitesurf	0.2%	0.3%	0.2%	0.4%	1.2%	0.0%	0.5%	0.7%
Jet ski/ Parasail	1.8%	1.5%	2.7%	0.7%	0.6%	1.4%	0.8%	7.8%
Scuba diving	3.6%	2.5%	2.1%	3.0%	4.3%	1.4%	6.0%	4.3%
Fishing	3.6%	2.7%	0.4%	2.0%	1.1%	0.8%	4.8%	2.3%
Golf	7.4%	6.1%	6.6%	10.2%	2.5%	1.3%	4.8%	2.3%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	96.1%	95.8%	95.1%	98.4%	97.4%	94.1%	94.0%	98.8%
Run/ Jog/ Fitness walk	26.5%	24.9%	12.5%	30.9%	19.8%	18.4%	13.6%	9.3%
Spa	10.4%	9.9%	7.0%	8.0%	6.4%	5.8%	7.8%	11.0%
Hiking	44.0%	47.4%	18.7%	48.6%	45.0%	25.5%	31.1%	16.5%
Backpack/ camp	2.1%	2.7%	0.2%	2.8%	2.7%	0.8%	4.1%	1.0%
Agritourism	14.1%	14.6%	12.9%	11.8%	7.7%	11.5%	14.7%	24.2%
Sport event/ tournament	4.2%	5.4%	3.4%	5.0%	6.5%	3.5%	1.6%	2.3%
Park/ botanical garden	36.0%	42.1%	20.6%	37.4%	41.6%	29.7%	31.0%	24.6%
Waterpark	1.1%	0.9%	1.6%	1.3%	2.1%	1.9%	11.1%	3.0%
Mountain tube/ waterfall rappel	2.0%	1.7%	0.5%	1.3%	2.0%	1.2%	0.5%	0.7%
Zip-lining	4.3%	5.2%	1.3%	2.5%	2.3%	2.6%	1.2%	0.5%
Skydiving	0.3%	0.9%	0.8%	0.1%	0.5%	0.2%	4.3%	3.0%
All terrain vehicle (ATV)	3.7%	3.6%	1.7%	2.6%	2.1%	3.9%	7.8%	15.5%
Horseback riding	1.8%	2.1%	4.2%	2.3%	0.9%	1.3%	4.8%	1.5%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	98.1%	96.5%	97.0%	98.6%	97.0%	97.3%	97.4%	99.0%
Lunch/ sunset/ dinner/ evening cruise	21.4%	26.4%	16.5%	19.3%	28.2%	19.4%	55.2%	37.4%
Live music/ stage show	30.4%	34.8%	16.1%	30.5%	27.8%	22.9%	16.1%	13.6%
Nightclub/ dancing/ bar/ karaoke	8.7%	9.4%	4.2%	8.5%	9.8%	8.3%	11.4%	3.8%
Fine dining	55.2%	54.9%	42.2%	47.5%	39.7%	29.7%	47.3%	48.3%
Family restaurant	59.7%	56.7%	23.7%	61.7%	48.3%	67.0%	27.3%	36.4%
Fast food	34.5%	32.7%	53.4%	42.1%	40.3%	50.7%	43.5%	62.5%
Food truck	29.8%	28.5%	13.6%	35.1%	29.8%	25.9%	24.0%	58.5%
Café/ coffee house	46.1%	42.4%	48.4%	52.9%	52.7%	58.5%	34.9%	55.0%
Ethnic dining	32.4%	33.9%	7.0%	26.8%	21.4%	19.6%	20.9%	24.9%
Prepared own meal	50.0%	39.7%	14.5%	68.6%	42.9%	28.0%	21.5%	10.5%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	95.8%	94.7%	97.9%	96.5%	95.9%	96.7%	92.6%	99.2%
Mall/ department store	42.0%	40.0%	81.7%	57.1%	48.2%	75.7%	60.2%	82.7%
Designer boutique	18.9%	17.9%	23.7%	19.9%	11.3%	19.2%	12.2%	3.1%
Hotel/ resort store	34.1%	37.1%	33.0%	30.5%	23.3%	34.1%	19.1%	34.5%
Swap meet/ flea market	17.2%	13.6%	3.4%	16.8%	8.0%	11.0%	4.7%	2.5%
Discount/ outlet store	15.2%	16.1%	20.7%	24.2%	15.9%	47.2%	40.0%	67.8%
Supermarket	65.4%	57.6%	66.6%	74.5%	69.1%	51.4%	56.9%	59.6%
Farmer's market	37.5%	29.9%	16.3%	45.3%	33.0%	23.0%	12.6%	8.4%
Convenience store	47.3%	45.7%	45.7%	51.9%	35.9%	62.2%	38.1%	54.0%
Duty free store	3.9%	5.0%	34.7%	5.9%	6.8%	11.5%	53.6%	44.8%
Local shop/ artisan	64.7%	65.9%	9.6%	64.7%	58.7%	54.1%	31.9%	10.9%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	68.9%	74.2%	56.0%	68.6%	71.3%	69.5%	79.1%	66.0%
Historic military site	17.0%	26.5%	16.4%	15.0%	30.4%	38.9%	42.8%	8.8%
Other historical site	28.2%	31.1%	15.8%	25.2%	30.4%	21.7%	26.6%	34.9%
Museum/ art gallery	19.3%	17.4%	6.0%	17.7%	17.0%	12.0%	25.7%	5.8%
Luau/ Polynesian show/ hula show	28.5%	38.0%	14.3%	30.6%	27.5%	29.1%	12.9%	20.5%
Lesson- ex. ukulele, hula, canoe, lei making	6.4%	7.4%	7.1%	6.8%	6.9%	7.2%	11.8%	5.8%
Play/ concert/ theatre	4.1%	4.2%	3.7%	5.3%	4.2%	3.6%	4.7%	4.5%
Art/ craft fair	15.2%	11.5%	3.2%	15.3%	10.1%	8.7%	10.7%	3.1%
Festival event	6.1%	5.5%	2.9%	5.5%	4.0%	5.9%	1.5%	1.2%

ACTIVITIES – TRANSPORTATION

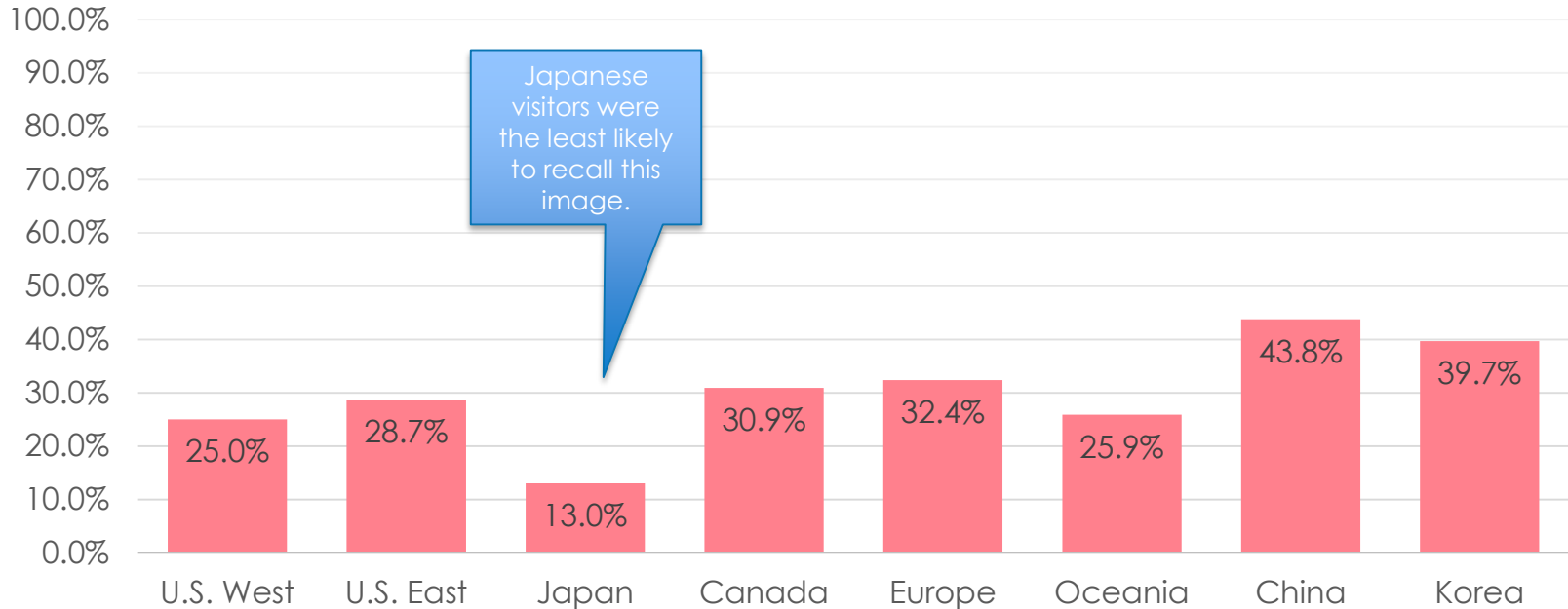
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	93.2%	93.1%	97.8%	94.8%	94.1%	95.8%	81.1%	98.0%
Airport shuttle	15.7%	16.2%	29.4%	15.8%	19.8%	51.1%	15.2%	21.4%
Trolley	3.4%	3.4%	52.2%	5.5%	6.2%	24.1%	3.8%	29.5%
Public bus	4.3%	4.6%	14.9%	8.9%	15.1%	28.5%	13.9%	11.2%
Tour bus/ tour van	9.3%	18.8%	30.7%	10.4%	17.9%	34.3%	20.3%	40.4%
Taxi/ limo	6.5%	9.8%	29.1%	11.6%	19.5%	34.4%	22.6%	20.2%
Rental car	79.5%	73.9%	24.5%	80.8%	66.4%	33.1%	43.2%	55.0%
Ride share	15.9%	19.1%	4.8%	14.3%	16.6%	29.5%	15.0%	11.6%
Bicycle rental	1.8%	2.1%	3.4%	3.3%	3.5%	2.2%	2.5%	1.0%

ACTIVITIES – OTHER

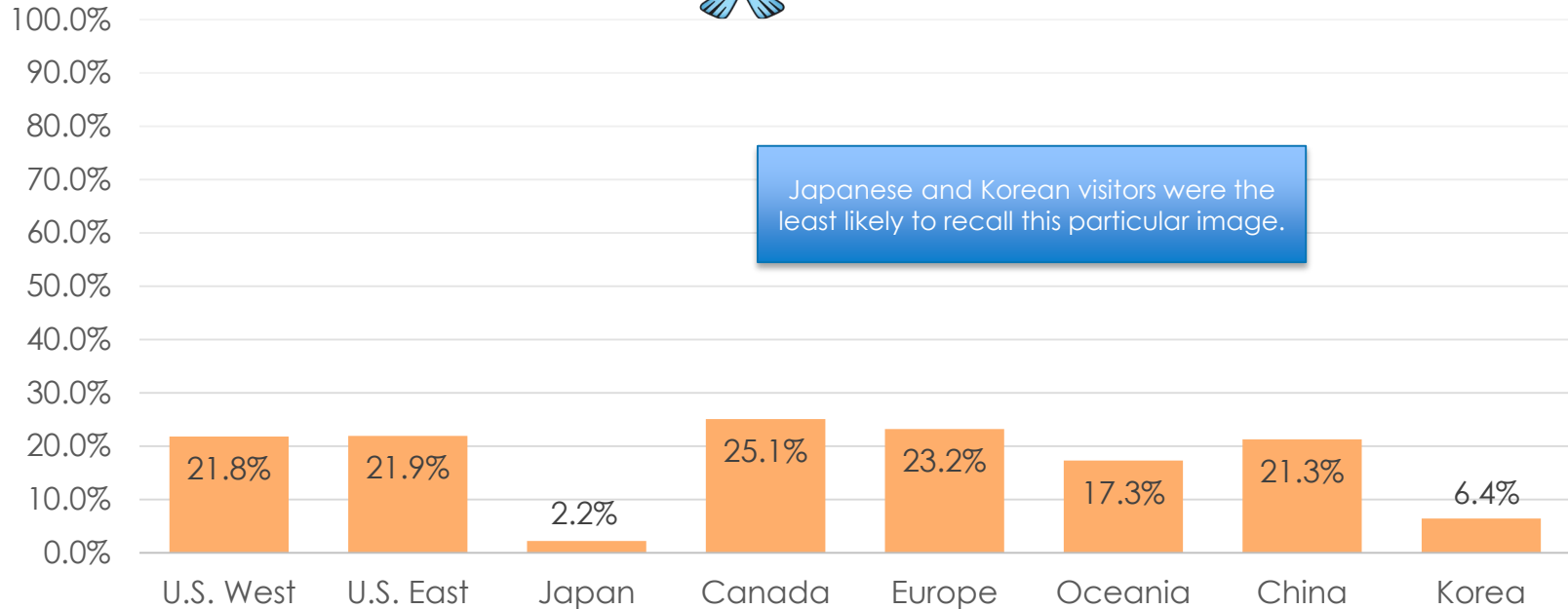
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	29.4%	24.6%	13.0%	20.2%	20.0%	9.3%	19.9%	16.7%
Visit friends/ family	28.6%	24.0%	12.3%	19.4%	16.9%	8.7%	17.6%	16.5%
Volunteer at non-profit	1.2%	0.9%	0.6%	1.0%	3.3%	1.0%	2.8%	0.2%

SECTION – SIGNAGE

HVCB POST-ARRIVAL EXPERIENCE LOGO



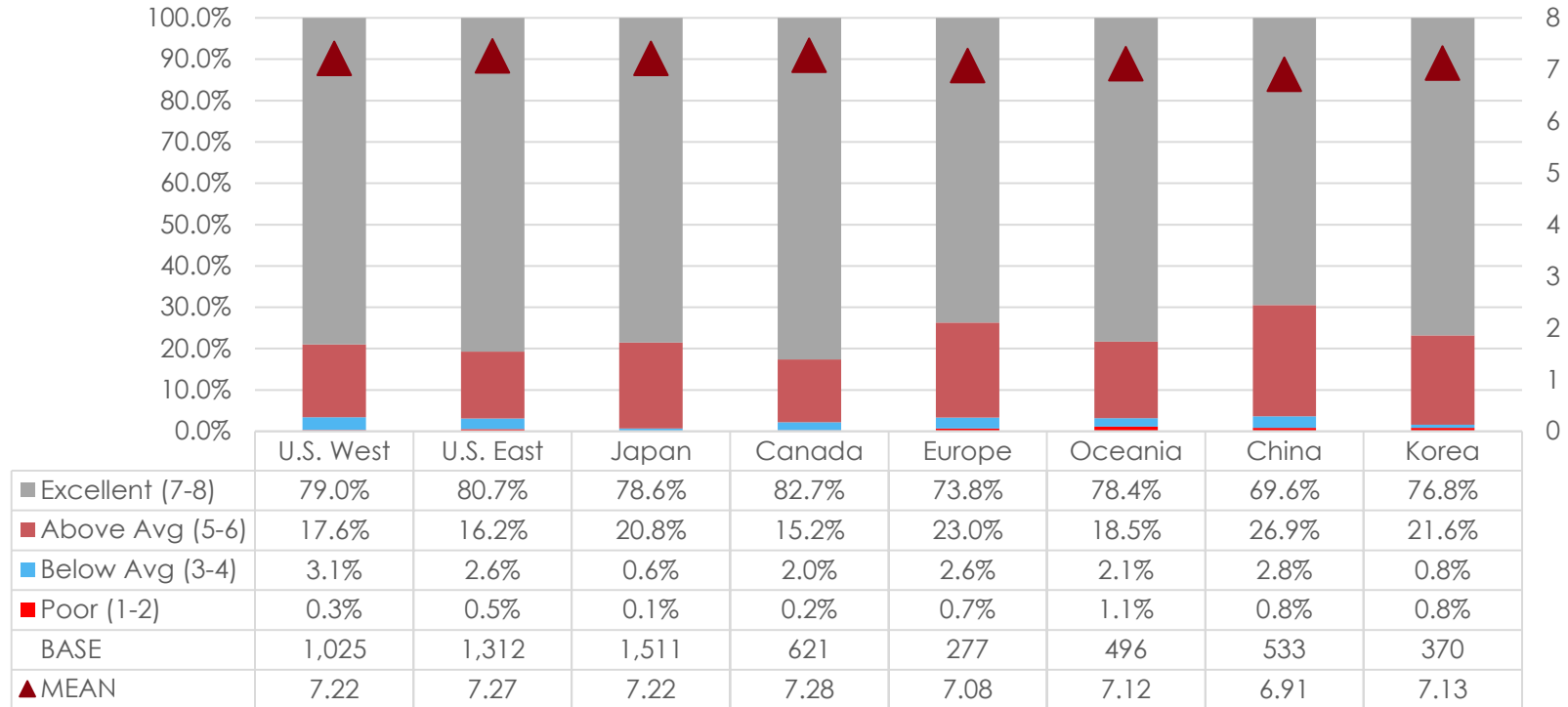
OCEAN SAFETY LOGO



SECTION – O'AHU

SATISFACTION – O‘AHU

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



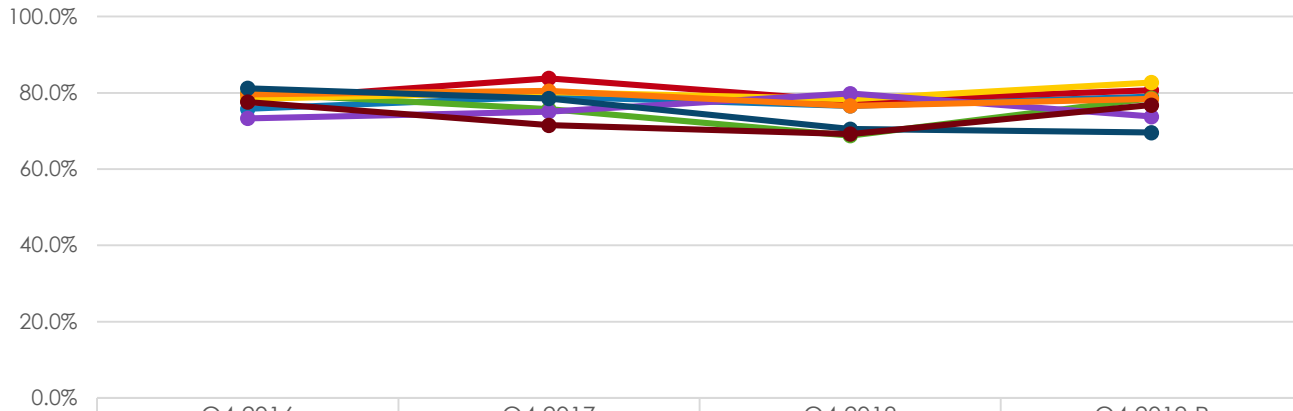
SATISFACTION – O‘AHU

COMPARISON OF MEAN SCORES

- **Only visited O‘ahu:** Those from the following visitor markets who visited just O‘ahu during this trip tended to rate the island higher compared to those who also visited a Neighbor Island: U.S. West, U.S. East, Japan, Canada, Oceania, and Korea.
- **Age:** Among visitors from Japan, seniors were less satisfied overall with their stay on O‘ahu than were younger travelers from this market.
- **Gender:** Female travelers from U.S. East were more satisfied with their stay on O‘ahu than were males from this visitor market.

SATISFACTION – O‘AHU

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

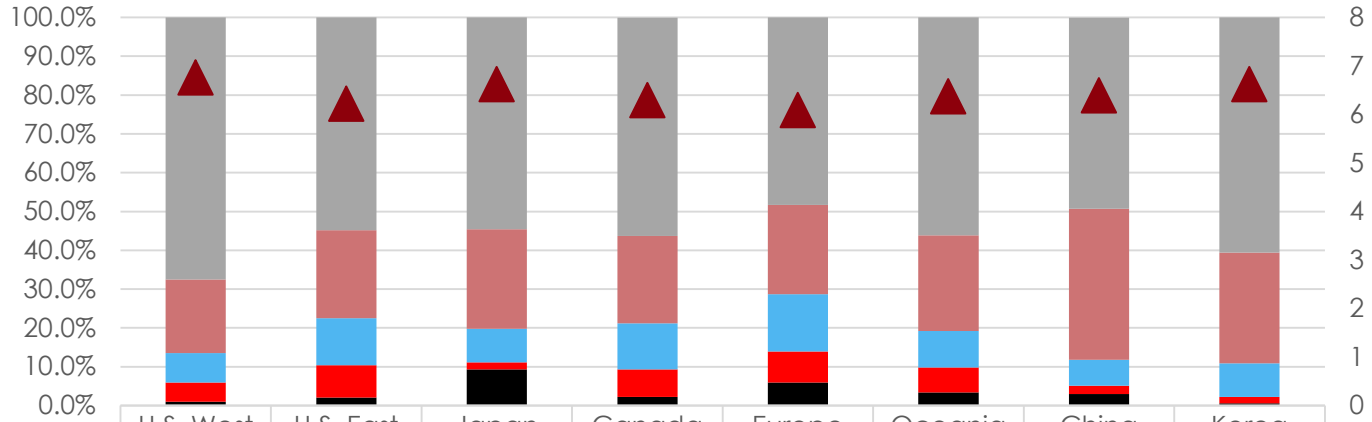


	Q4 2016	Q4 2017	Q4 2018	Q4 2019 P
U.S. West	75.8%	79.0%	76.6%	79.0%
U.S. East	78.2%	83.8%	77.8%	80.7%
Japan	79.9%	75.7%	68.8%	78.6%
Canada	78.4%	80.2%	78.3%	82.7%
Europe	73.3%	75.1%	79.8%	73.8%
Oceania	79.6%	80.5%	76.6%	78.4%
China	81.2%	78.5%	70.5%	69.6%
Korea	77.6%	71.5%	69.2%	76.8%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

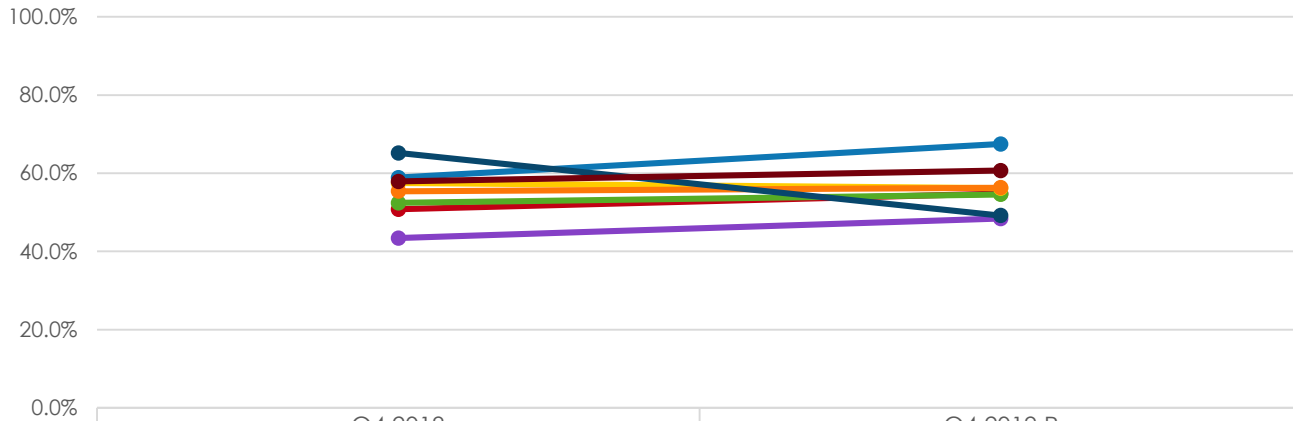
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	67.5%	54.8%	54.6%	56.2%	48.4%	56.3%	49.2%	60.7%
■ Somewhat likely (5-6)	19.0%	22.7%	25.6%	22.5%	23.0%	24.7%	38.9%	28.5%
■ Somewhat unlikely (3-4)	7.6%	12.1%	8.7%	11.9%	14.8%	9.4%	6.7%	8.7%
■ Very unlikely (1-2)	4.9%	8.3%	1.8%	7.1%	8.0%	6.4%	2.1%	1.6%
■ Not sure	1.0%	2.1%	9.3%	2.2%	5.9%	3.4%	3.0%	0.6%
BASE	840	863	1,438	505	185	447	427	319
▲ MEAN	6.76	6.22	6.62	6.29	6.09	6.37	6.39	6.62

LIKELIHOOD OF RETURN VISIT – O‘AHU

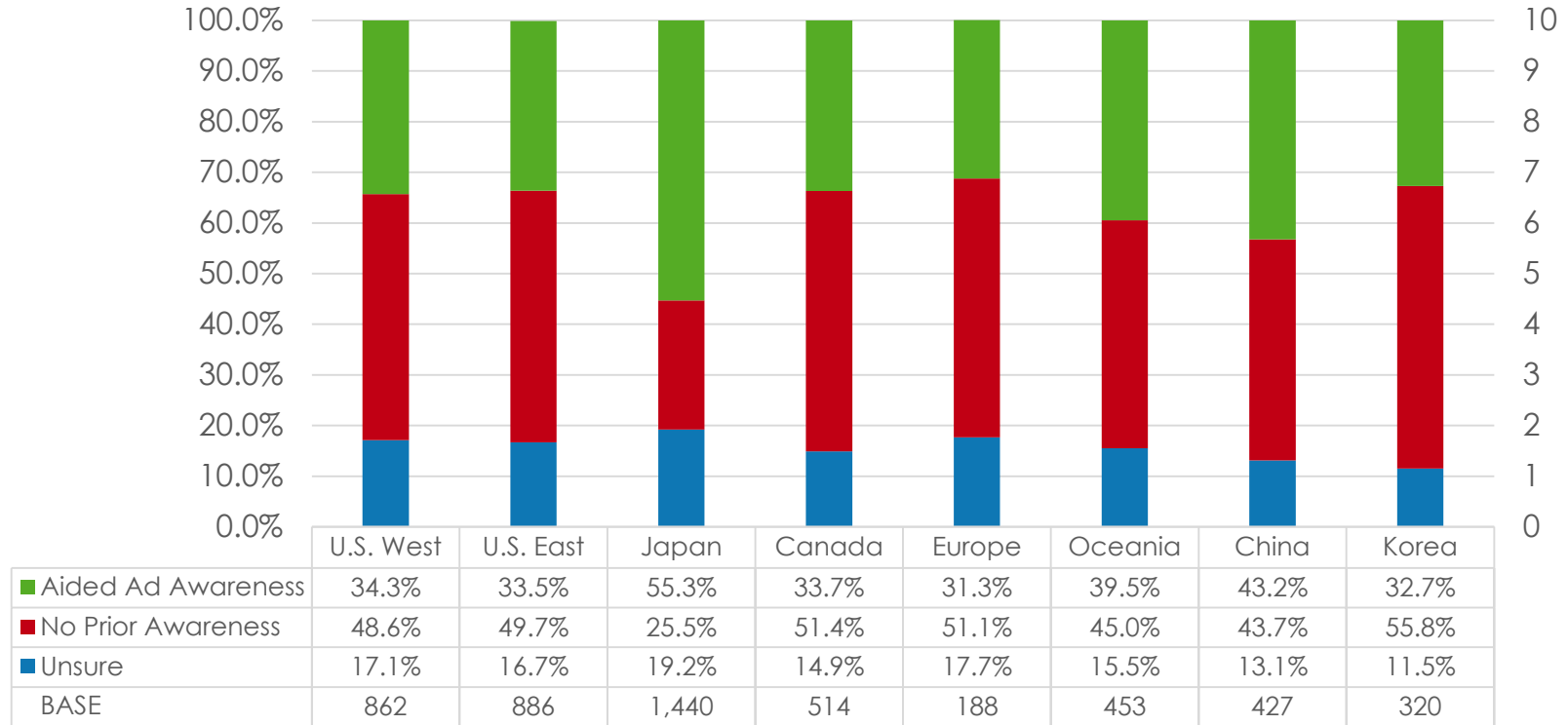
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019 P
U.S. West	58.9%	67.5%
U.S. East	50.8%	54.8%
Japan	52.4%	54.6%
Canada	57.5%	56.2%
Europe	43.4%	48.4%
Oceania	55.4%	56.3%
China	65.2%	49.2%
Korea	57.9%	60.7%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Atlantis Submarine & Cruises	3.5%	5.6%	6.5%	2.8%	3.7%	3.0%	29.5%	5.0%
Bernice P. Bishop Museum	5.1%	4.7%	2.0%	5.7%	2.4%	1.4%	7.0%	0.9%
Byodo-In Temple	7.2%	10.0%	1.3%	11.3%	7.8%	7.6%	4.8%	0.3%
Chinatown & Honolulu Art District	14.1%	14.2%	11.2%	16.1%	15.1%	7.6%	39.4%	2.9%
Diamond Head State Monument	30.1%	35.9%	25.9%	40.3%	45.5%	36.3%	23.3%	44.9%
Dole Plantation	28.1%	36.0%	12.5%	32.3%	22.1%	24.1%	32.7%	46.4%
Haleiwa	22.2%	23.1%	24.0%	28.3%	21.5%	12.4%	10.3%	13.6%
Hanauma Bay Nature Reserve	16.3%	19.5%	15.1%	28.2%	25.9%	17.6%	39.5%	42.7%
Harold L. Lyon Arboretum	1.0%	0.4%	0.6%	1.3%	1.3%	0.4%	2.9%	1.9%
Hawaii State Art Museum or Honolulu Museum of Art	2.6%	3.1%	3.4%	3.6%	4.4%	3.5%	6.1%	1.3%
Hawaiian Mission Houses, Historic Site and Archive	1.2%	1.8%	0.4%	0.7%	2.2%	1.3%	3.4%	1.6%
Hawaii's Plantation Village	2.6%	1.9%	0.7%	2.5%	5.4%	1.7%	9.6%	2.5%
Honolulu Zoo	7.4%	6.6%	5.9%	10.2%	6.1%	9.7%	10.7%	4.8%

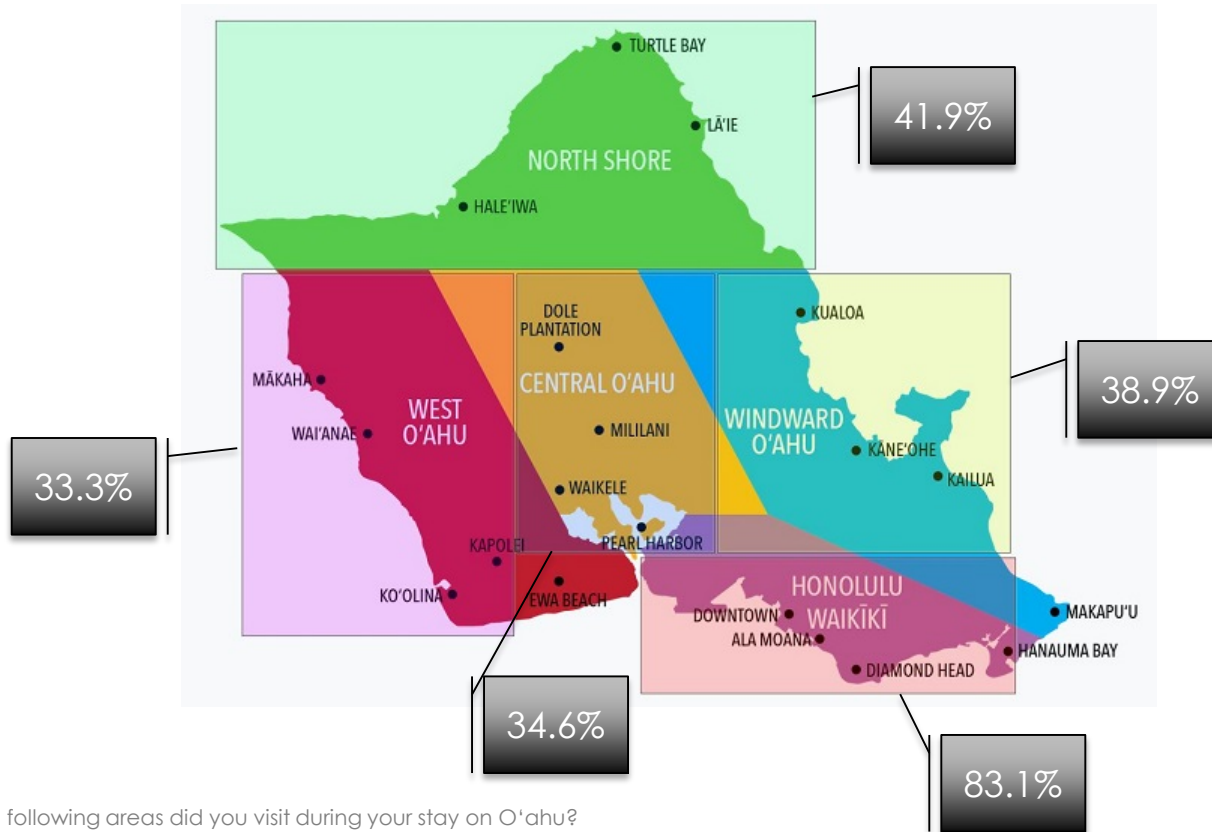
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Ho‘omaluhia Botanical Garden	3.0%	4.0%	0.6%	5.2%	6.2%	2.8%	7.5%	1.3%
Iolani Palace State Monument	6.0%	9.1%	8.3%	8.7%	11.0%	6.5%	20.1%	19.7%
Kaiwi State Scenic Shoreline/ Makapuu Trail	5.3%	7.8%	3.1%	7.9%	6.7%	1.0%	15.6%	0.6%
Kakaako Street Art	1.8%	2.4%	14.2%	3.2%	1.8%	2.2%	7.3%	2.5%
Koko Head Crater Trail	6.5%	7.0%	3.1%	12.2%	11.7%	4.9%	6.7%	3.2%
Kualoa Private Nature Reserve	7.5%	10.0%	8.6%	12.7%	15.2%	13.1%	27.5%	17.1%
Lanikai or Kailua Beach	27.2%	25.9%	20.6%	37.2%	33.0%	17.2%	12.0%	23.6%
Manoa Falls & Trail	8.1%	7.8%	2.0%	13.7%	13.4%	5.9%	10.4%	4.5%
National Memorial Cemetery of the Pacific	10.3%	13.5%	1.3%	10.6%	17.6%	12.7%	18.3%	2.6%
Nuuanu Pali Lookout	8.6%	11.2%	2.1%	14.7%	7.6%	5.9%	27.7%	6.3%
North Shore Beaches	47.6%	53.1%	16.4%	55.8%	50.0%	38.7%	27.1%	25.2%

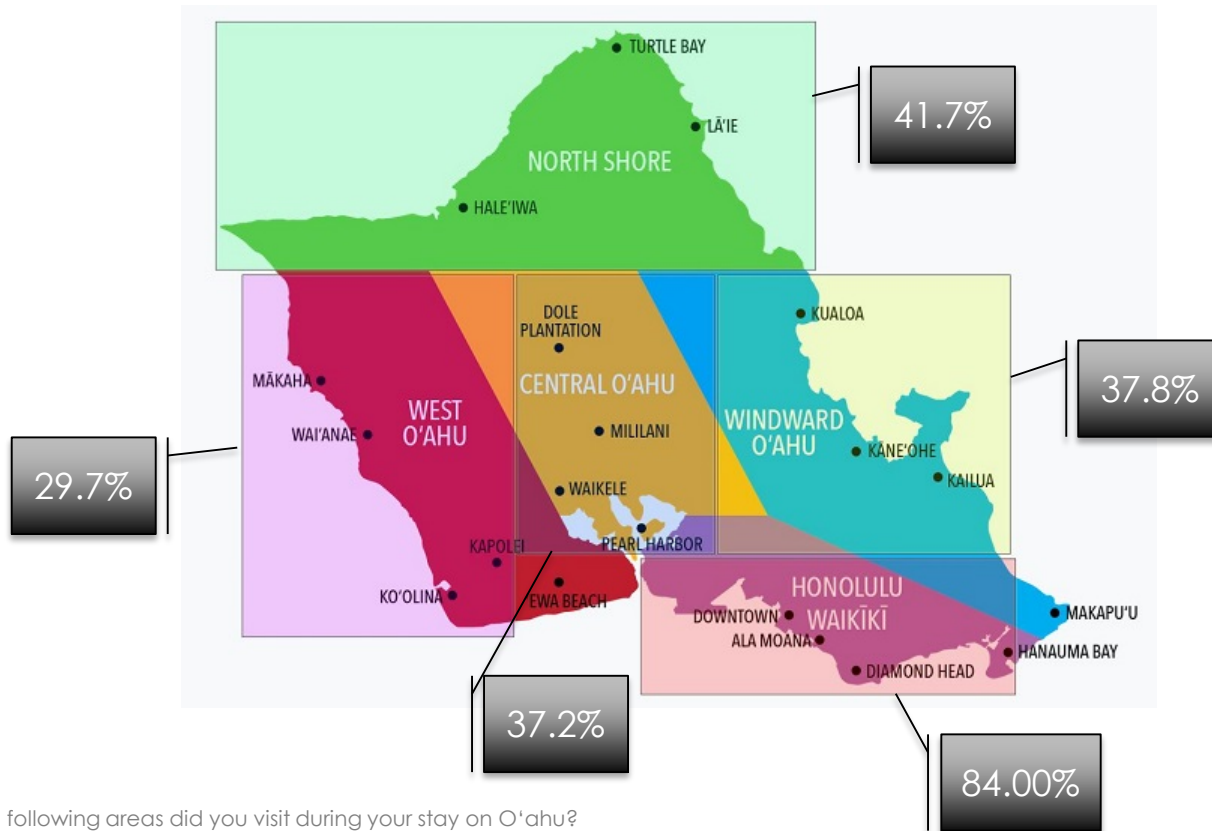
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pearl Harbor	34.9%	50.0%	7.0%	39.9%	58.9%	42.1%	51.8%	7.5%
Polynesian Cultural Center	18.4%	19.5%	3.8%	19.6%	15.4%	8.1%	25.3%	12.0%
Queen Emma’s Summer Palace	2.9%	1.5%	0.4%	2.4%	1.5%	2.5%	3.6%	2.2%
Sea Life Park Hawaii	4.3%	4.0%	2.6%	7.4%	2.2%	2.6%	6.1%	1.0%
Waikiki Aquarium	5.6%	4.8%	4.4%	10.0%	8.0%	5.7%	11.6%	1.6%
Waimanalo Beach Park	8.6%	10.9%	2.6%	17.6%	21.7%	7.4%	10.9%	9.9%
Waimea Valley	15.7%	17.6%	2.2%	19.8%	20.3%	12.7%	15.2%	2.9%

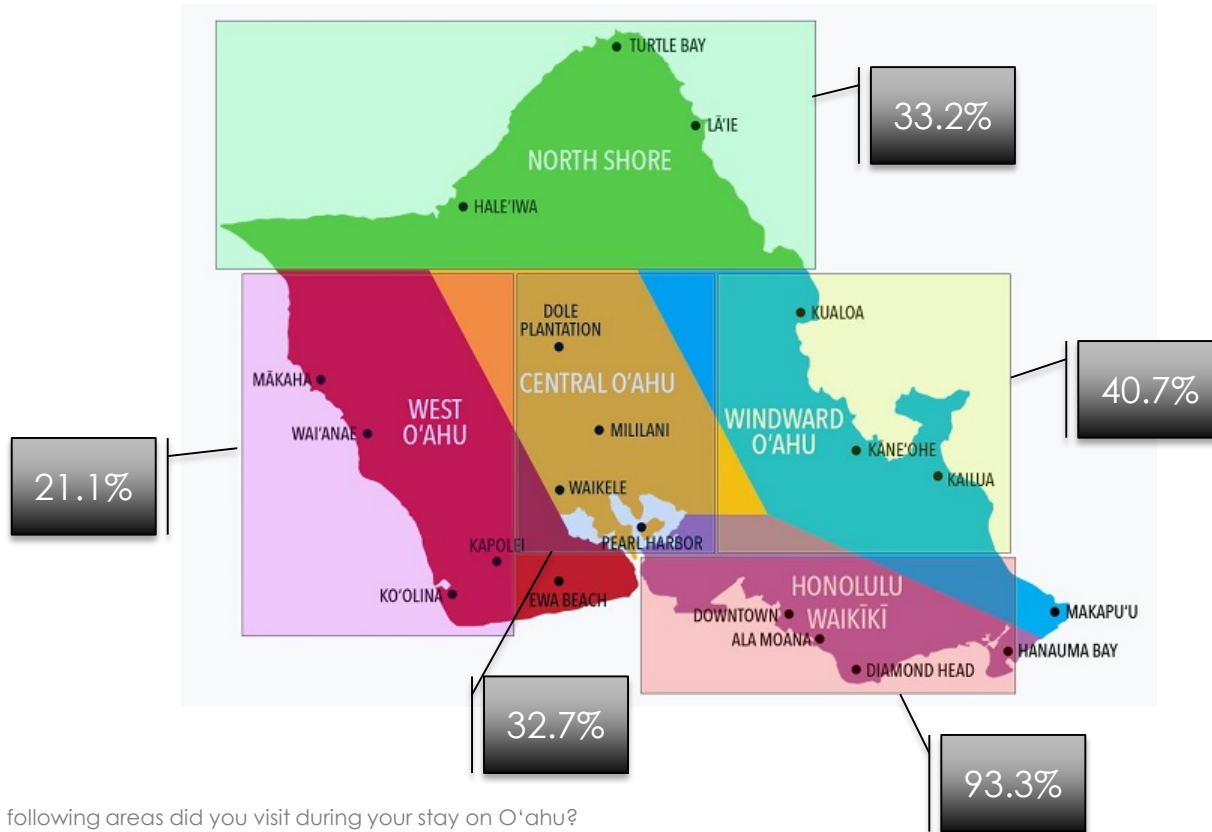
AREAS VISITED U.S. WEST



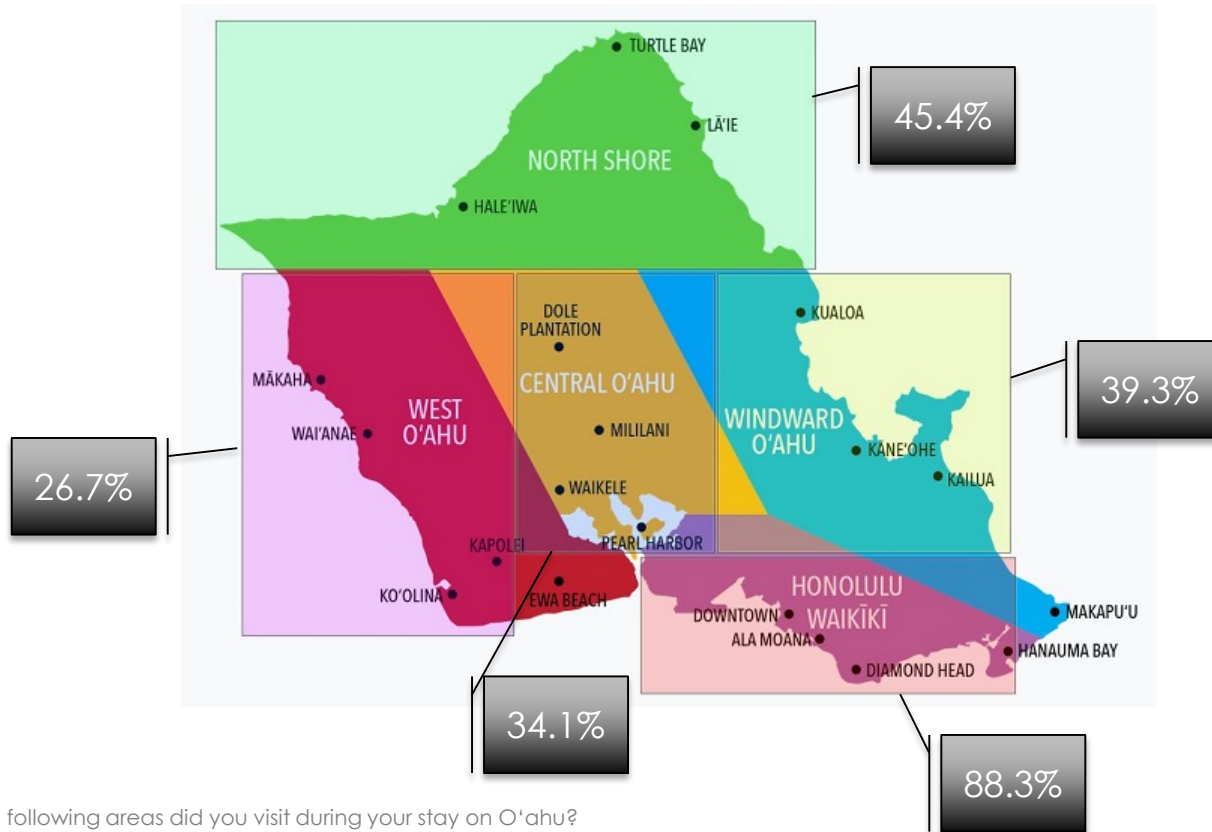
AREAS VISITED U.S. EAST



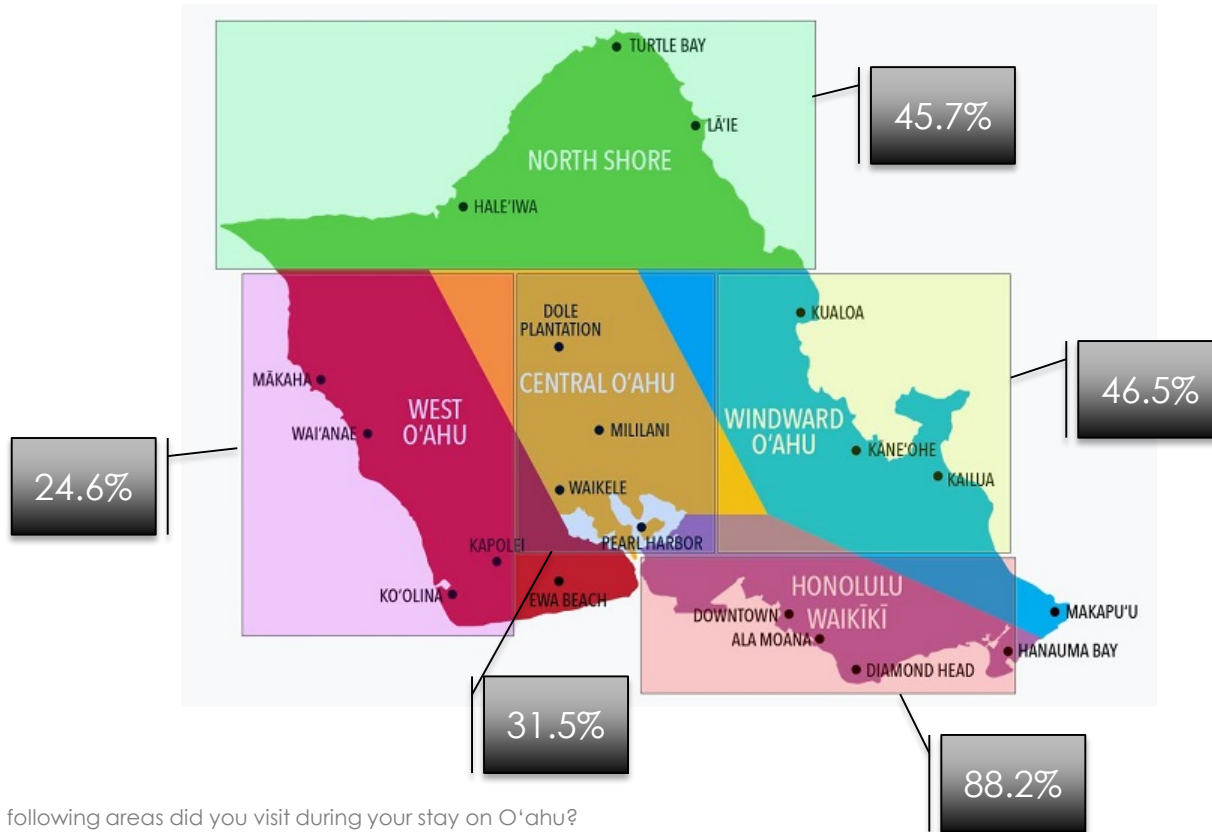
AREAS VISITED JAPAN



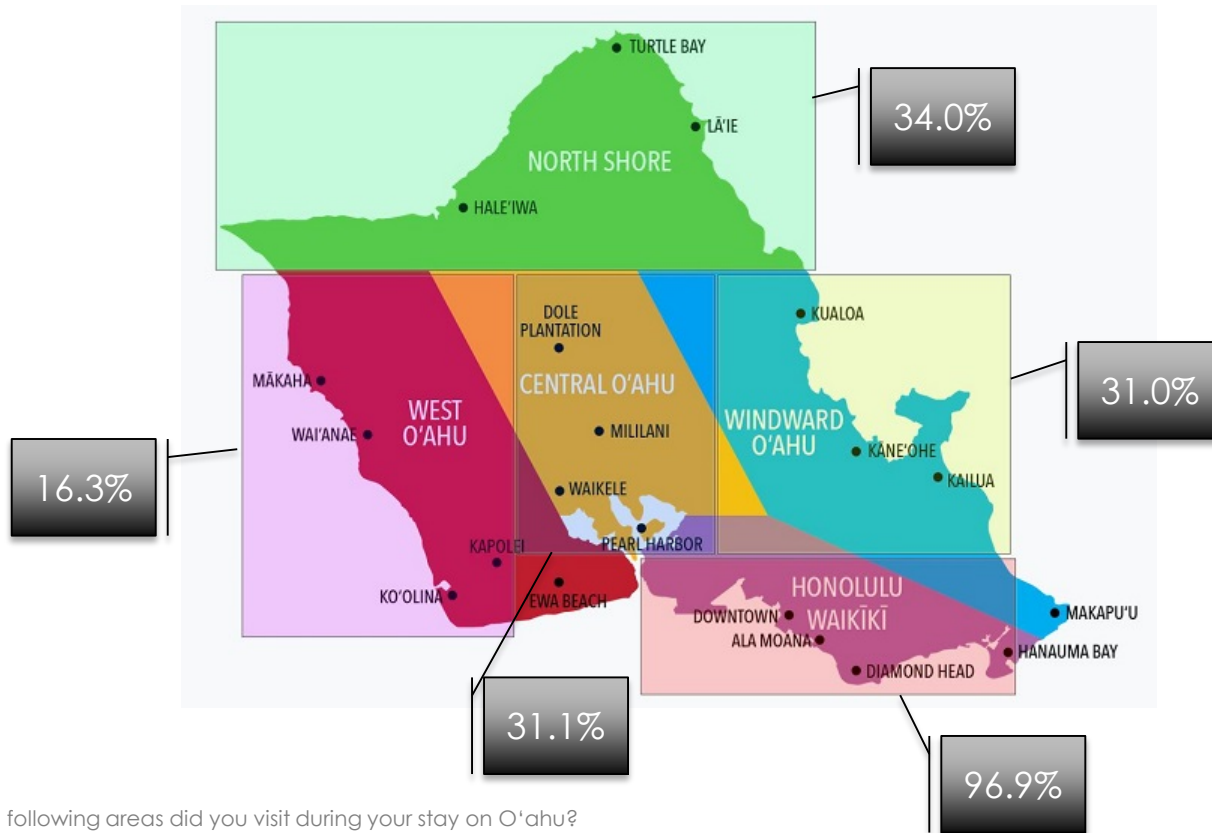
AREAS VISITED CANADA



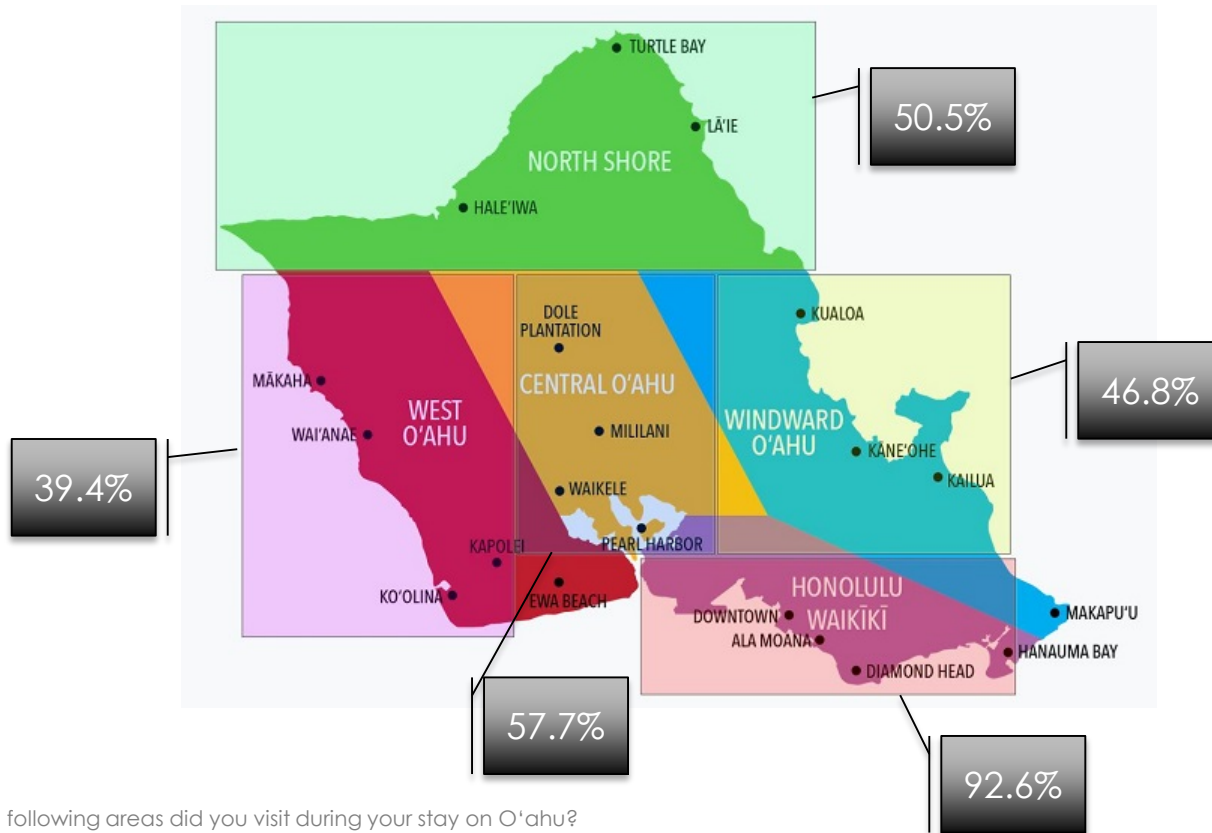
AREAS VISITED EUROPE



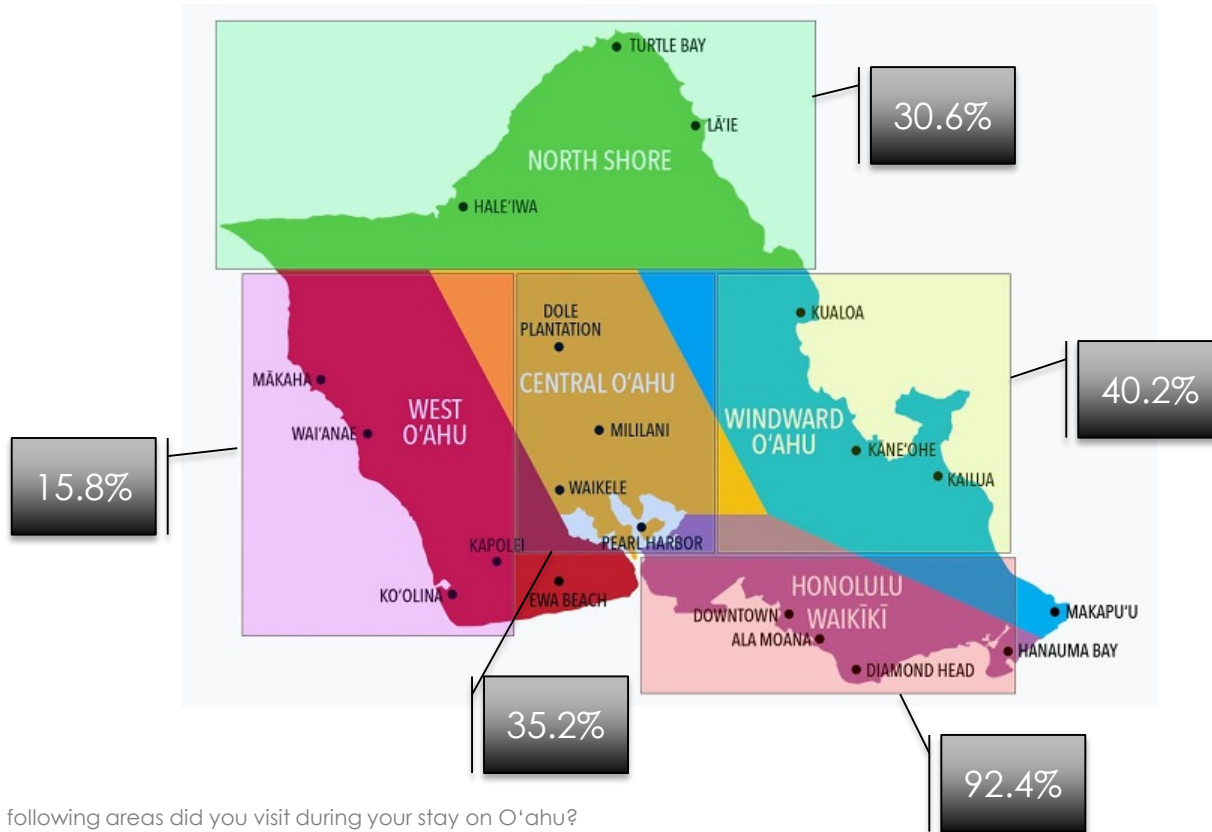
AREAS VISITED OCEANIA



AREAS VISITED CHINA

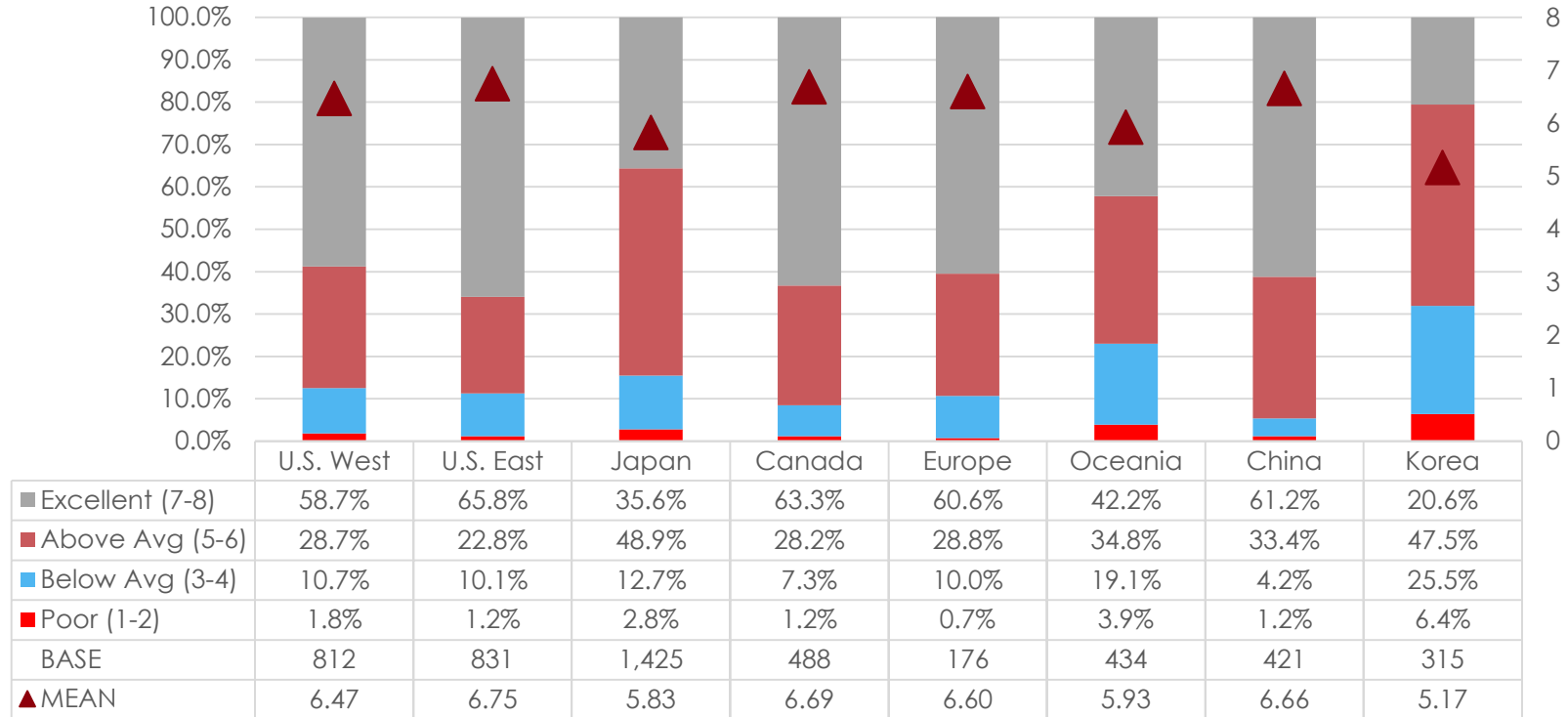


AREAS VISITED KOREA



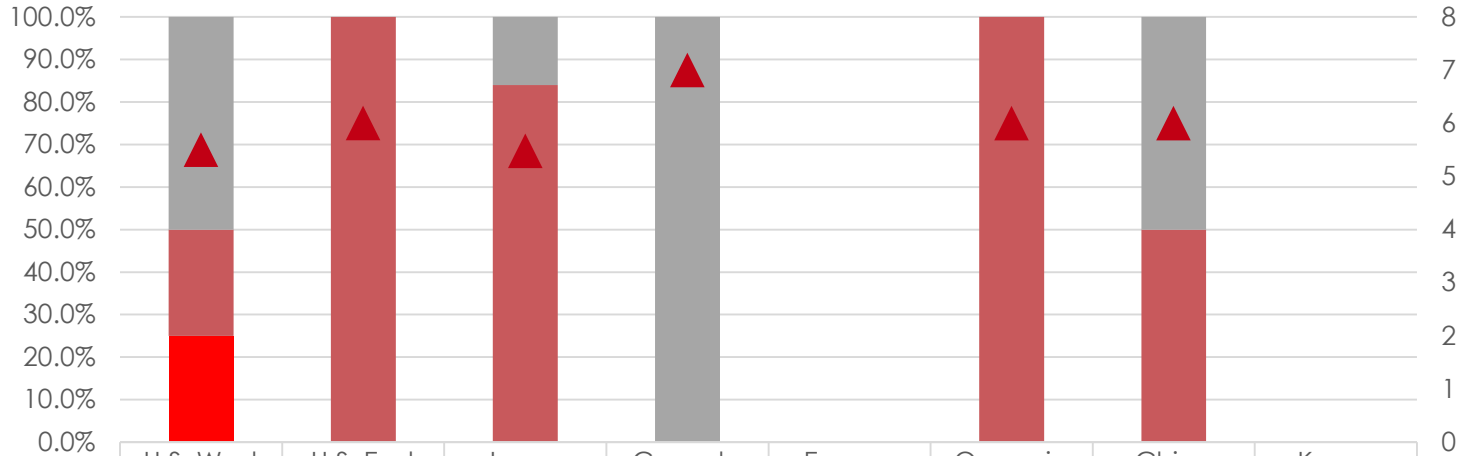
SATISFACTION – Daniel K. Inouye International Airport

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



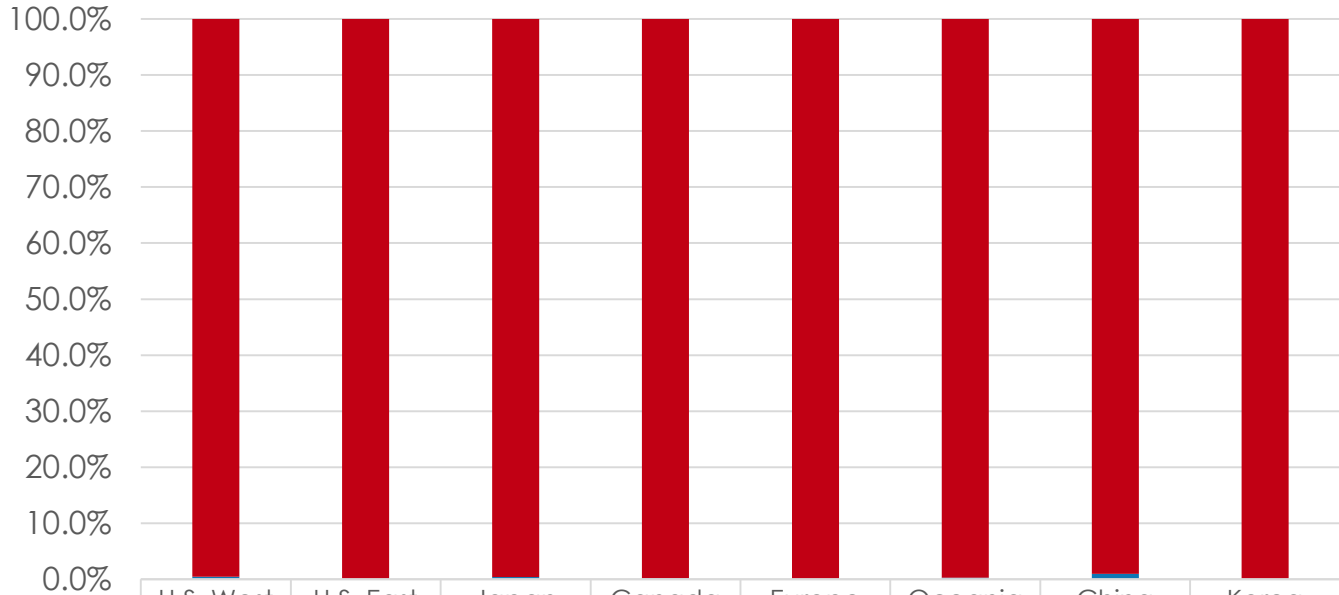
SATISFACTION – Honolulu Harbor

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	50.0%	0.0%	16.0%	100.0%	0.0%	0.0%	50.0%	0.0%
■ Above Avg (5-6)	25.0%	100.0%	84.0%	0.0%	0.0%	100.0%	50.0%	0.0%
■ Below Avg (3-4)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
■ Poor (1-2)	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	4	1	6	1	0	1	4	0
▲ MEAN	5.50	6.00	5.48	7.00		6.00	6.00	

TRANSPAC TRAVEL OPTIONS – O‘AHU

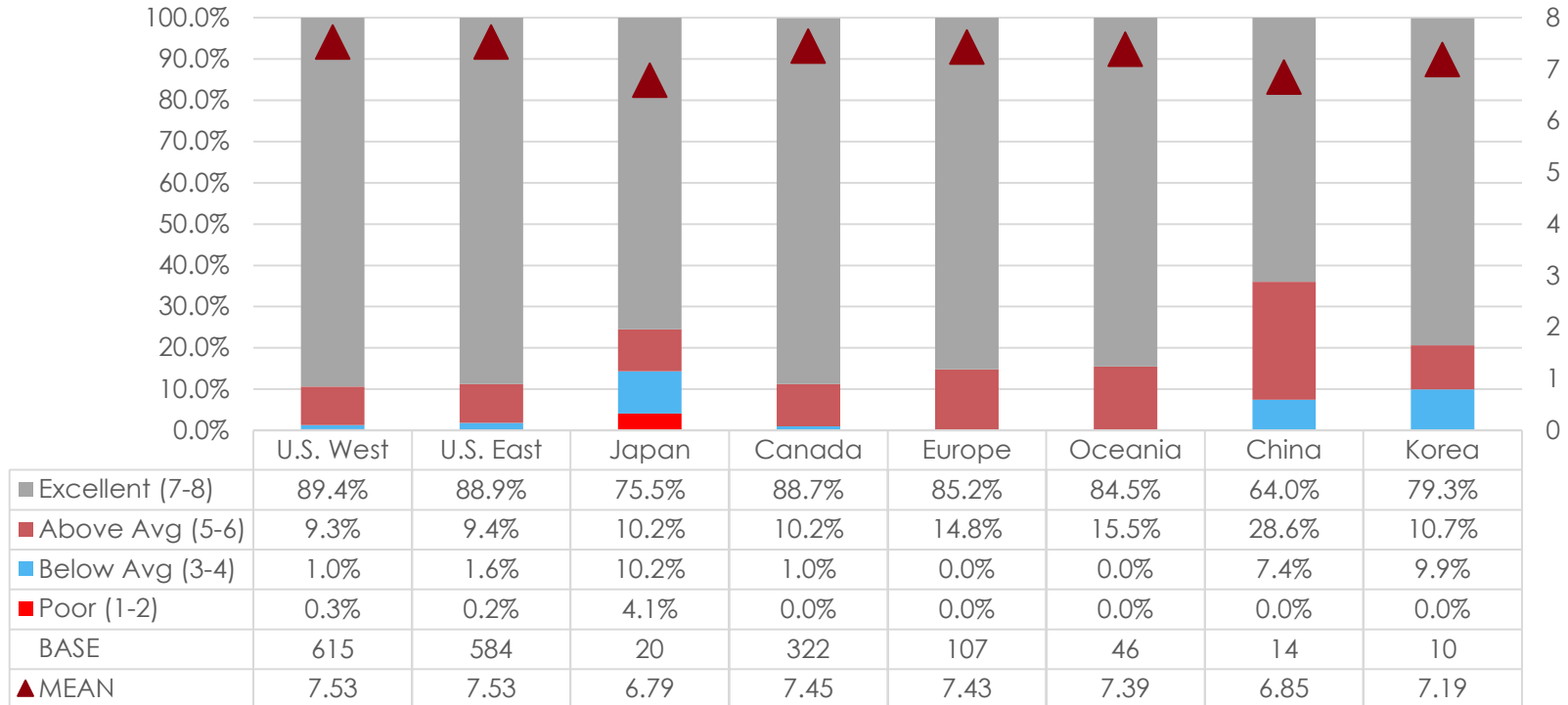


■ Air/ Flight	99.5%	99.9%	99.6%	99.8%	100.0%	99.7%	99.0%	100.0%
■ Cruise Ship/ Ocean Vessel	0.5%	0.1%	0.4%	0.2%	0.0%	0.3%	1.0%	0.0%
BASE	817	834	1,431	489	176	435	425	315

SECTION – KAUA‘I

SATISFACTION – KAUA‘I

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



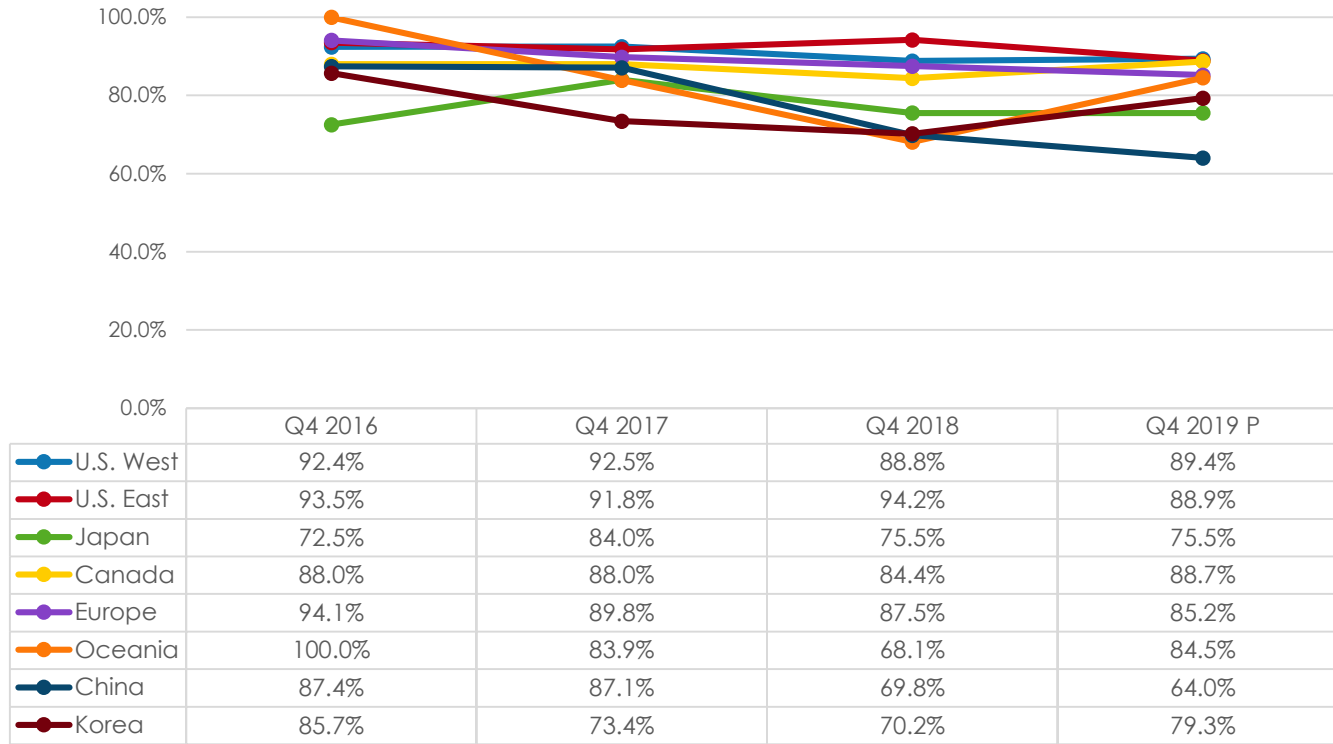
SATISFACTION – KAUA‘I

COMPARISON OF MEAN SCORES

- **Life stage:** Visitors who came to get married/honeymoon were more satisfied with their experience on Kaua‘i than visitors in other life stages (family, young, middle age, senior).
- **Gender:** Female travelers from U.S. East were more satisfied with their stay on Kaua‘i than were males from this visitor market.

SATISFACTION – KAUA‘I

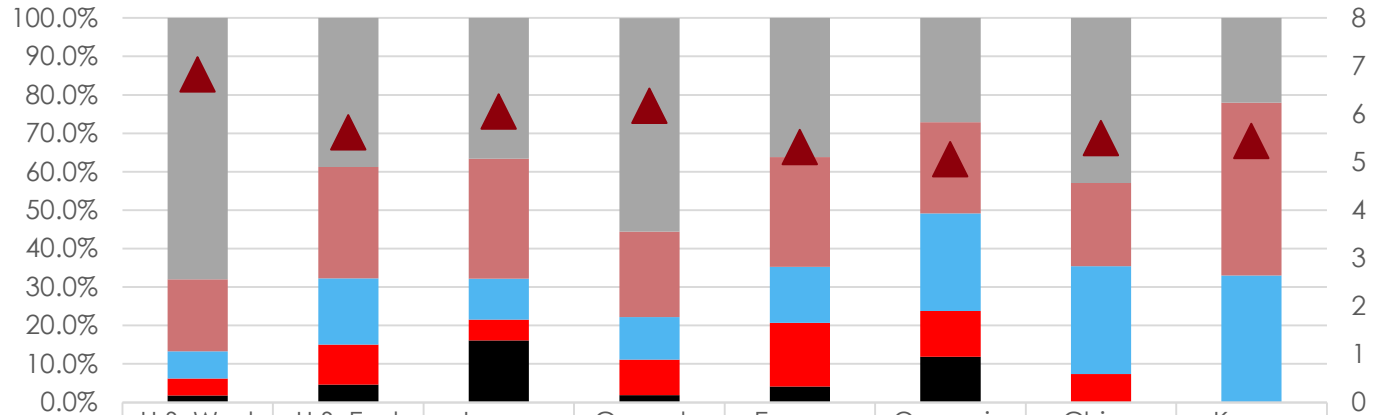
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – KAUA‘I

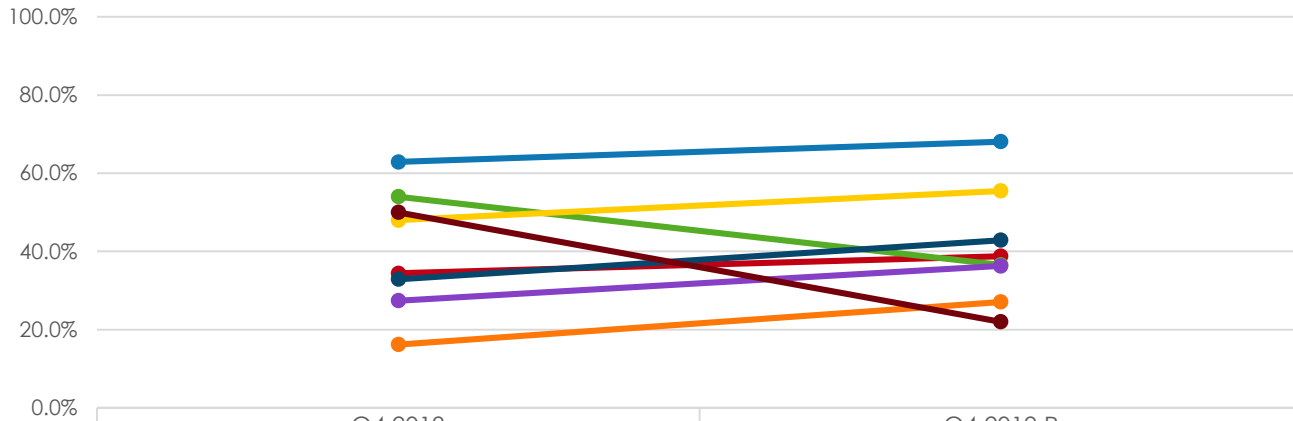
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	68.1%	38.8%	36.6%	55.5%	36.3%	27.1%	42.9%	22.0%
■ Somewhat likely (5-6)	18.7%	28.9%	31.2%	22.2%	28.5%	23.7%	21.7%	45.0%
■ Somewhat unlikely (3-4)	7.1%	17.3%	10.7%	11.1%	14.6%	25.4%	28.0%	33.0%
■ Very unlikely (1-2)	4.4%	10.4%	5.4%	9.2%	16.6%	11.9%	7.4%	0.0%
■ Not sure	1.8%	4.6%	16.1%	1.9%	4.1%	11.9%	0.0%	0.0%
BASE	595	529	19	297	94	41	14	9
▲ MEAN	6.82	5.62	6.05	6.17	5.31	5.06	5.50	5.44

LIKELIHOOD OF RETURN VISIT – KAUA‘I

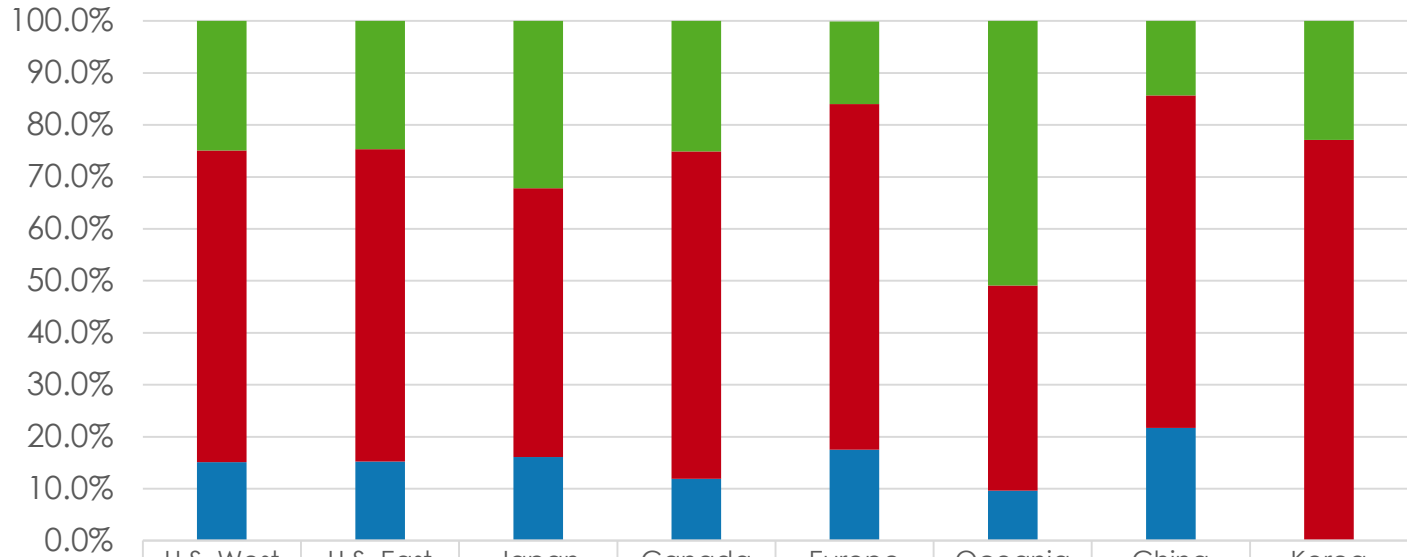
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019 P
U.S. West	62.9%	68.1%
U.S. East	34.4%	38.8%
Japan	54.0%	36.6%
Canada	48.0%	55.5%
Europe	27.4%	36.3%
Oceania	16.2%	27.1%
China	32.9%	42.9%
Korea	50.0%	22.0%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – KAUA'I



■ Aided Ad Awareness	24.9%	24.7%	32.2%	25.1%	15.9%	50.9%	14.3%	22.9%
■ No Prior Awareness	60.0%	60.1%	51.7%	63.0%	66.5%	39.5%	64.0%	77.1%
■ Unsure	15.1%	15.2%	16.1%	11.9%	17.5%	9.6%	21.7%	0.0%
BASE	603	541	19	307	96	41	14	9

ATTRACTIONS – KAUA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Fern Grotto	8.9%	12.2%	63.4%	9.1%	9.6%	14.7%	14.9%	0.0%
Hanalei Town	54.5%	38.6%	10.7%	56.3%	52.0%	17.0%	35.4%	22.0%
Hanalei Beach	46.2%	33.3%	16.1%	56.7%	49.6%	26.6%	50.3%	22.0%
Kalalau Trail	13.8%	14.5%	10.7%	21.9%	25.1%	0.0%	14.3%	0.0%
Kalapaki Beach	24.4%	22.3%	21.5%	30.3%	23.1%	19.2%	22.3%	11.0%
Bike Path in Kapaa	7.7%	5.4%	5.4%	13.7%	4.1%	0.0%	6.9%	0.0%
Kaua'i Museum	6.6%	3.7%	5.4%	4.5%	4.9%	2.8%	0.0%	11.0%
Ke'e Beach	13.1%	8.8%	0.0%	19.5%	21.9%	4.5%	14.3%	0.0%
Kilauea Lighthouse	35.6%	28.0%	5.4%	35.1%	37.1%	20.9%	13.7%	33.0%
Koke'e	9.9%	8.3%	5.4%	17.3%	14.2%	2.3%	14.3%	0.0%

ATTRACTIONS – KAUA‘I (cont.)

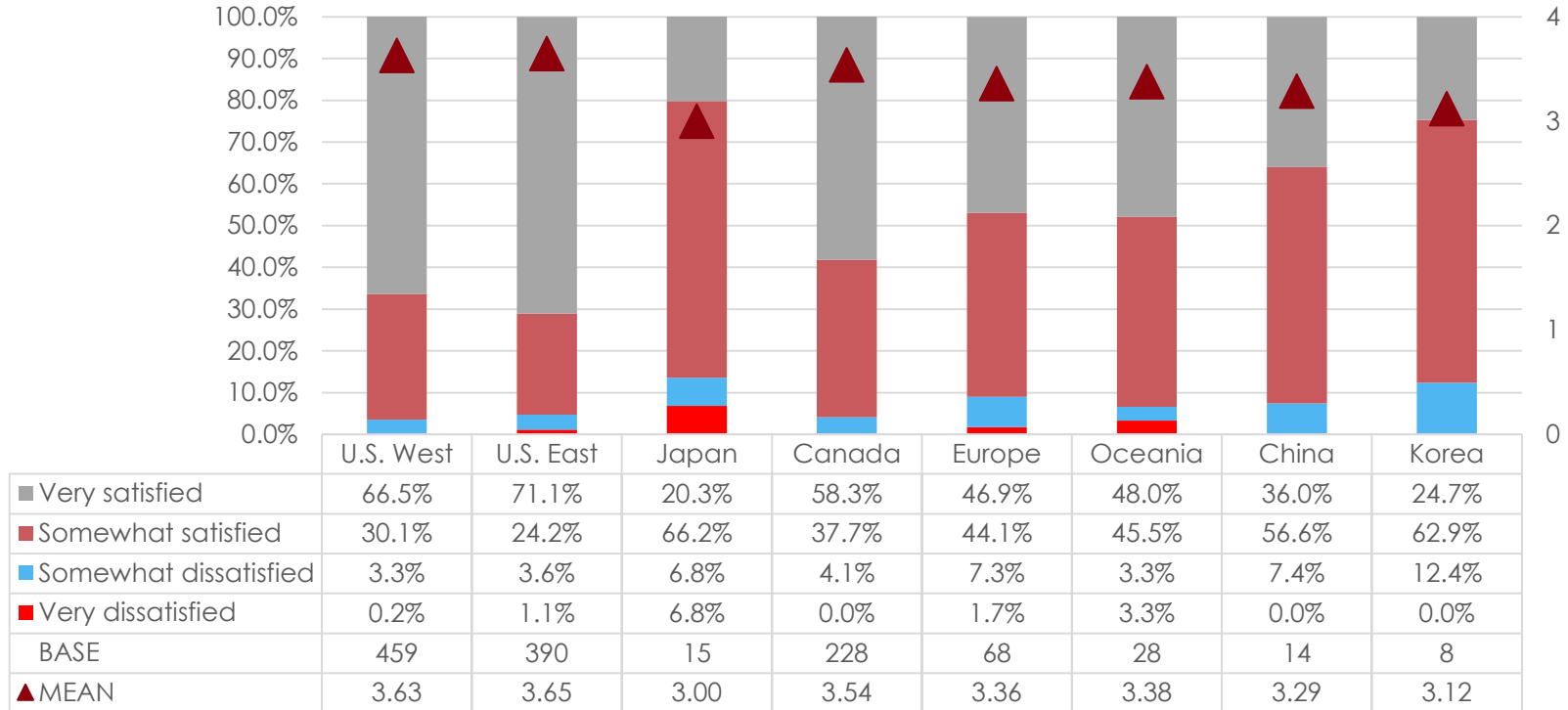
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Koke'e Museum	4.2%	2.5%	4.4%	5.7%	0.8%	0.0%	0.0%	0.0%
Na Aina Kai Gardens	1.7%	1.8%	0.0%	3.6%	2.0%	2.3%	0.0%	0.0%
Napali Coast	43.4%	49.1%	16.1%	44.7%	50.8%	47.4%	28.0%	33.0%
Allerton Garden	10.4%	8.6%	15.1%	10.5%	8.4%	9.6%	0.0%	0.0%
Limahuli Garden	4.9%	7.2%	20.5%	5.7%	2.4%	2.3%	0.0%	0.0%
Old Koloa Town	44.2%	23.5%	10.7%	44.8%	23.8%	11.3%	0.0%	11.9%
Opaeka'a Falls	26.9%	27.8%	5.4%	32.9%	36.5%	22.0%	28.6%	11.0%
Po'ipu Beach	65.4%	45.6%	32.2%	70.6%	57.1%	24.9%	28.6%	45.0%
Smith's Tropical Paradise Gardens	6.9%	8.7%	0.0%	8.3%	3.2%	5.1%	0.0%	0.0%
Spouting Horn	39.5%	30.9%	5.4%	40.6%	28.6%	32.2%	29.1%	22.9%
Wailua Falls	39.3%	39.4%	48.3%	45.9%	55.3%	40.7%	49.7%	44.0%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wailua River	21.3%	21.7%	32.2%	24.8%	30.8%	12.4%	21.1%	11.0%
Waimea Canyon	55.1%	61.3%	74.2%	66.1%	57.8%	60.5%	50.3%	78.0%
Disc Golf	0.0%	0.0%	0.0%	1.1%	1.2%	0.0%	0.0%	0.0%
Mini Golf	1.5%	2.0%	5.4%	2.5%	0.8%	0.0%	0.0%	0.0%

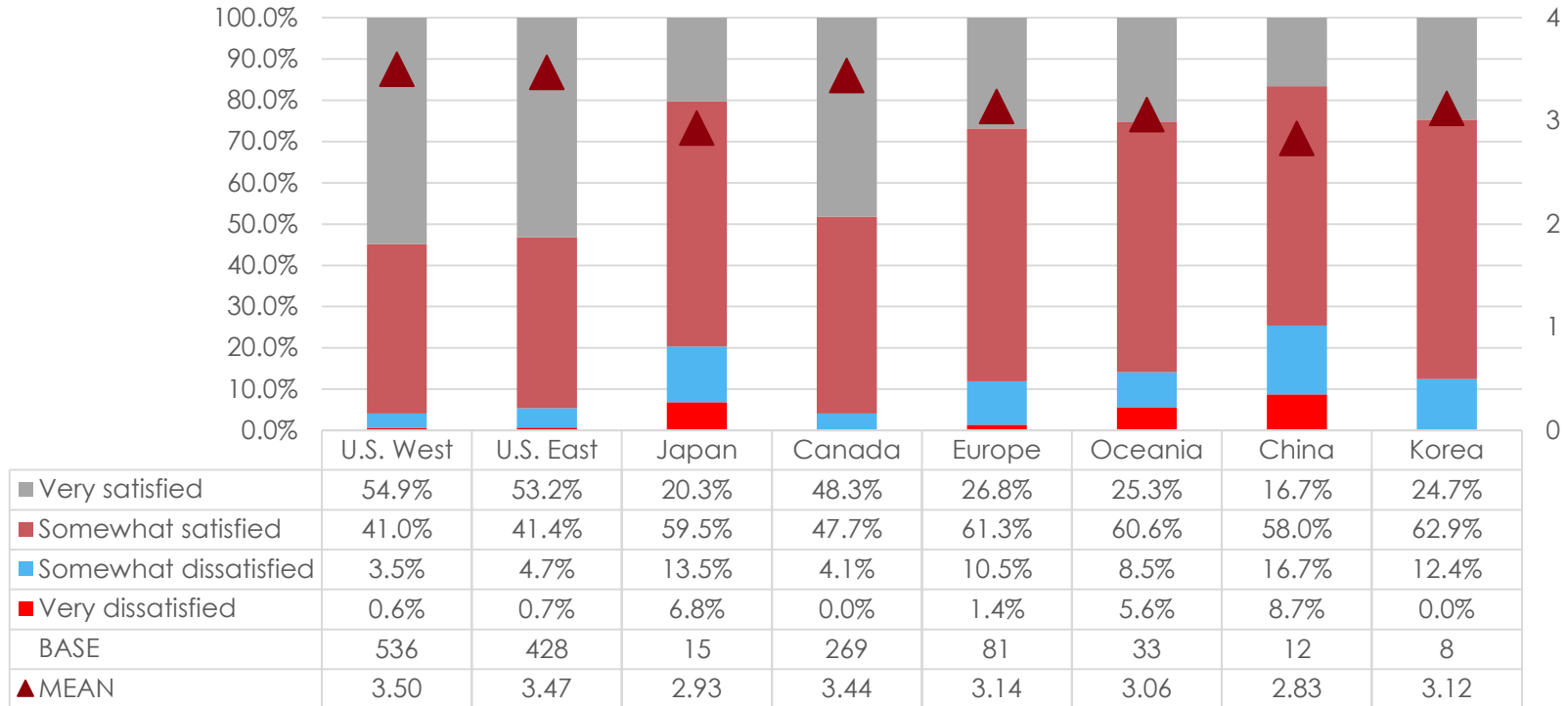
SATISFACTION – ENTERTAINMENT

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



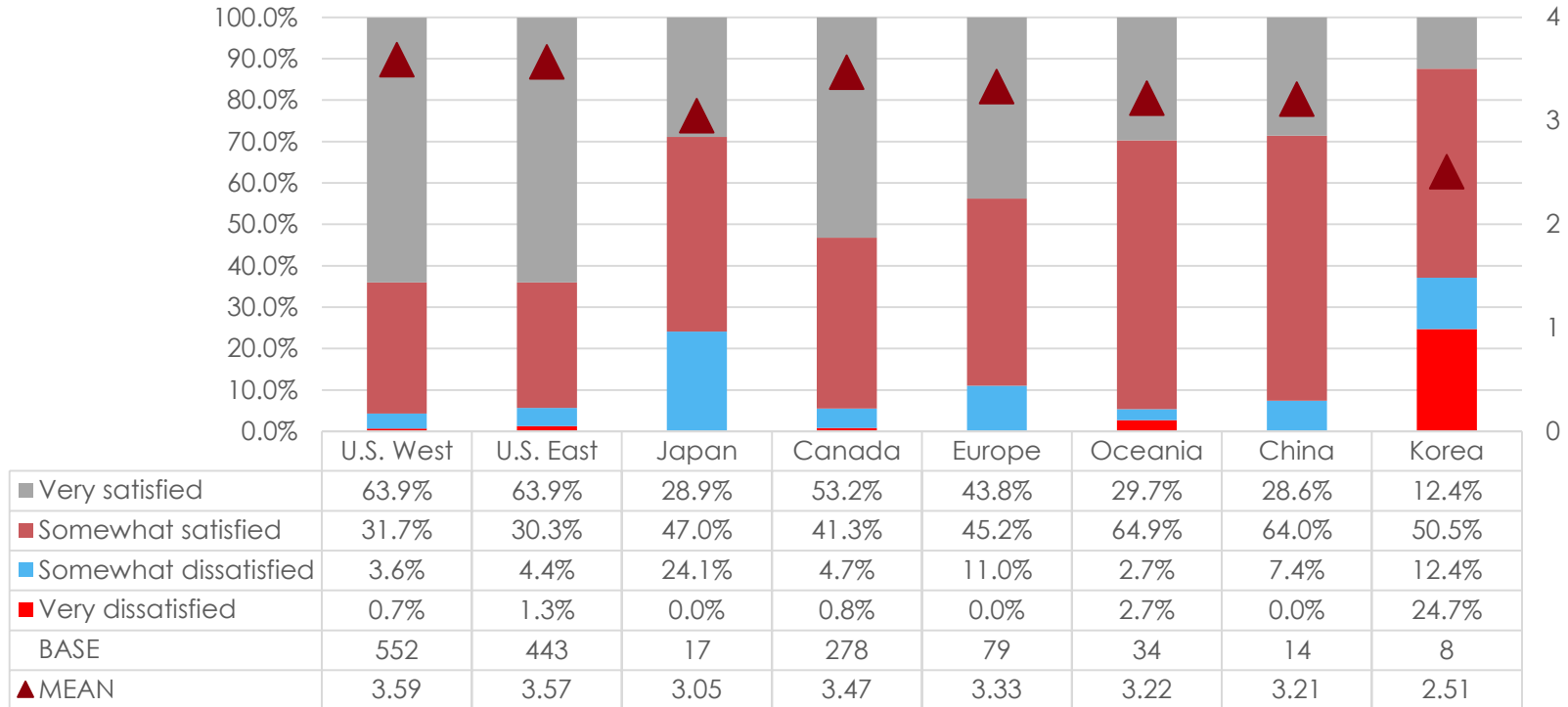
SATISFACTION – SHOPPING

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



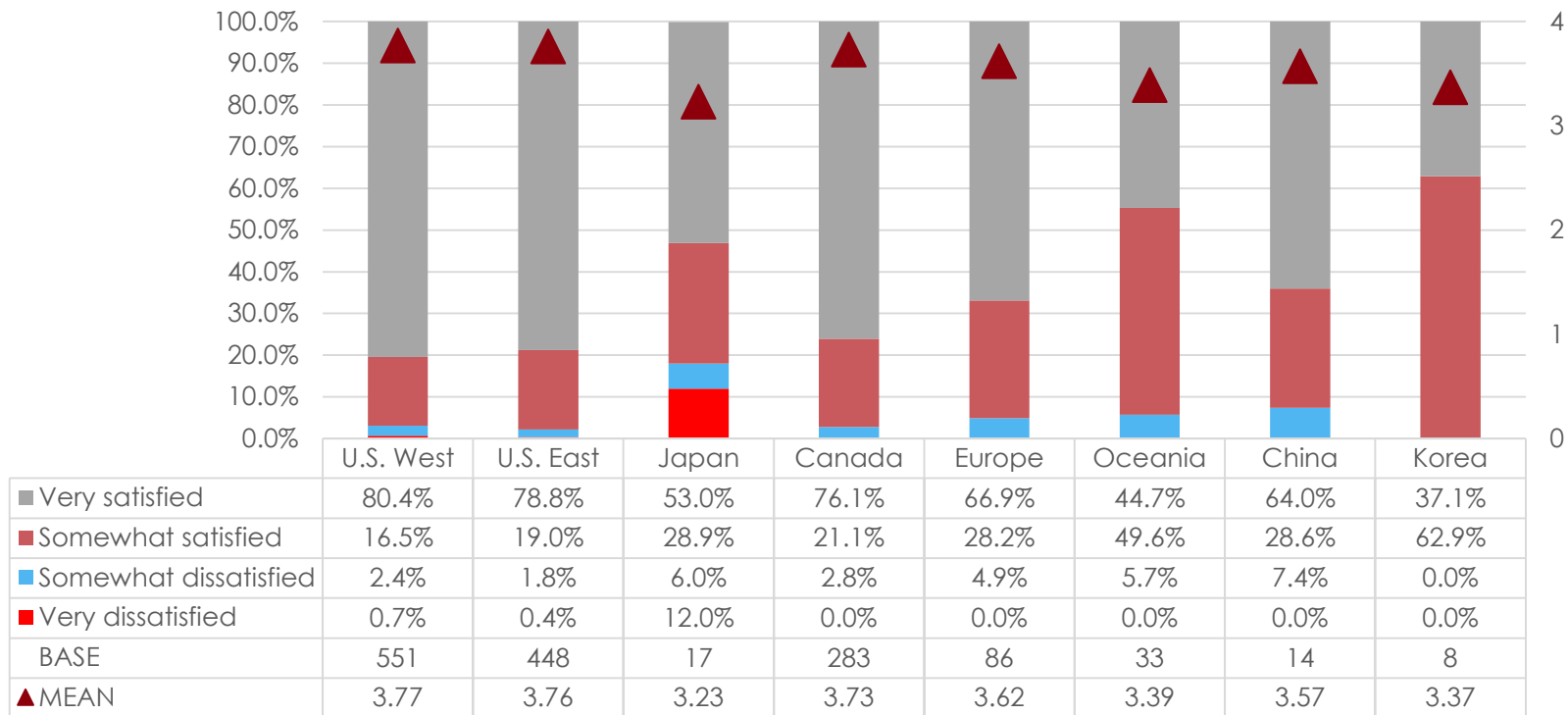
SATISFACTION – DINING

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



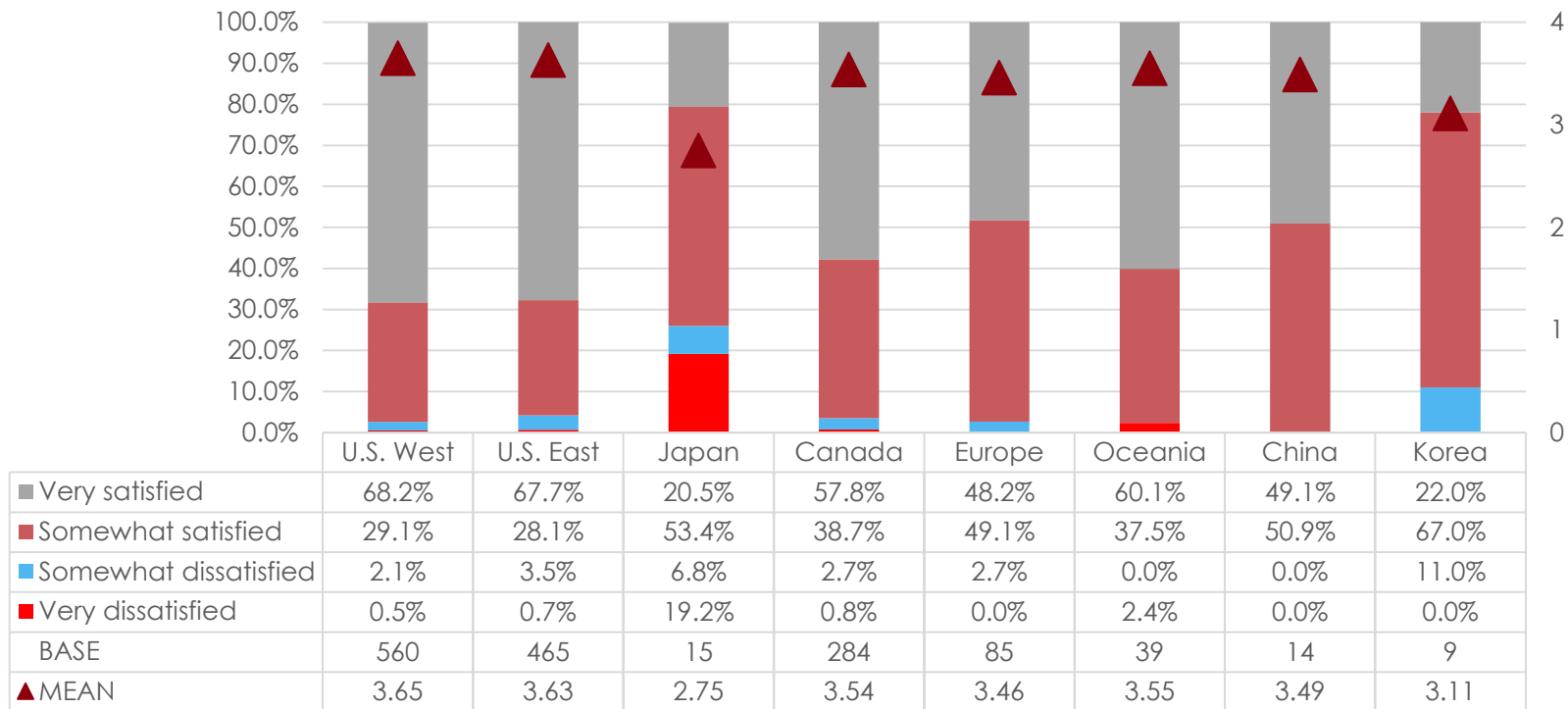
SATISFACTION – BEACHES

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



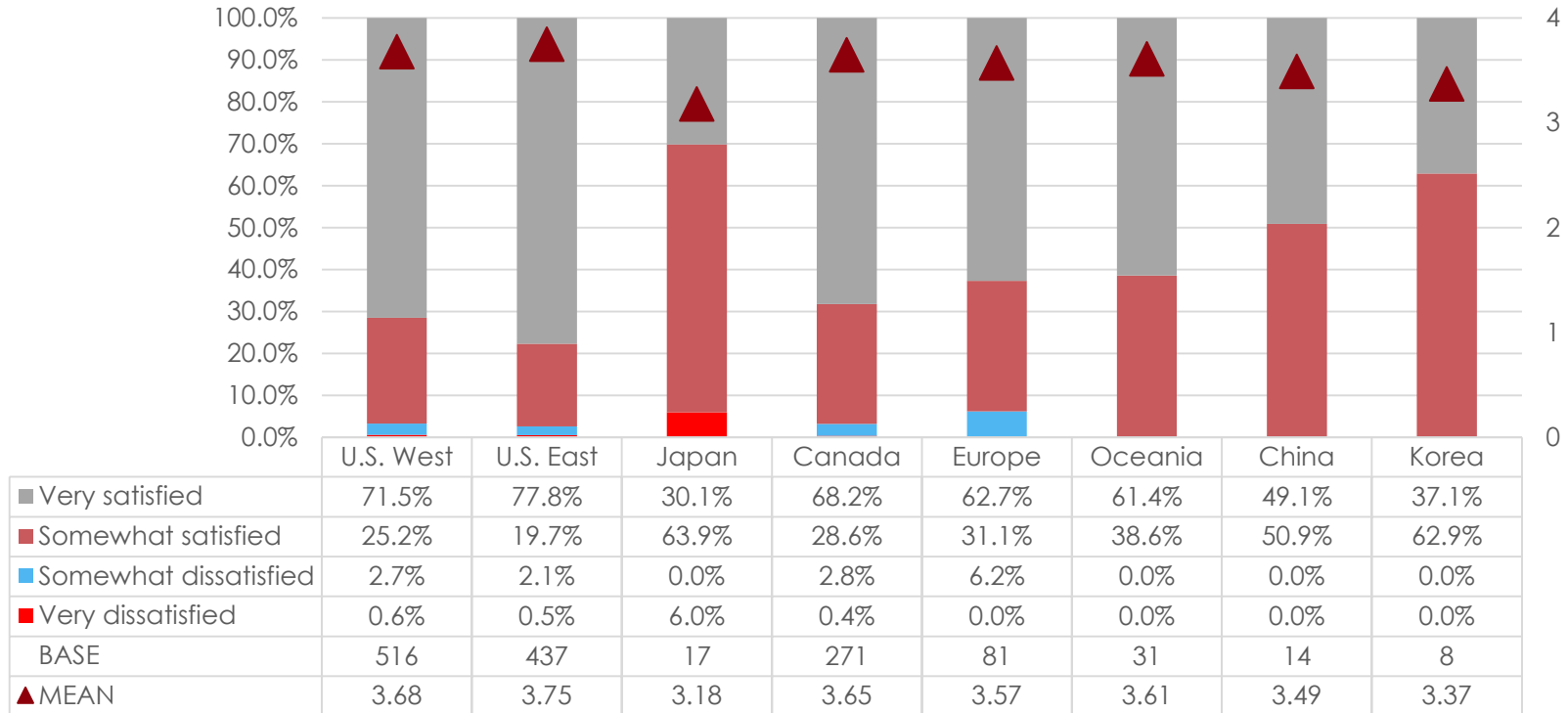
SATISFACTION – PUBLIC AREAS

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



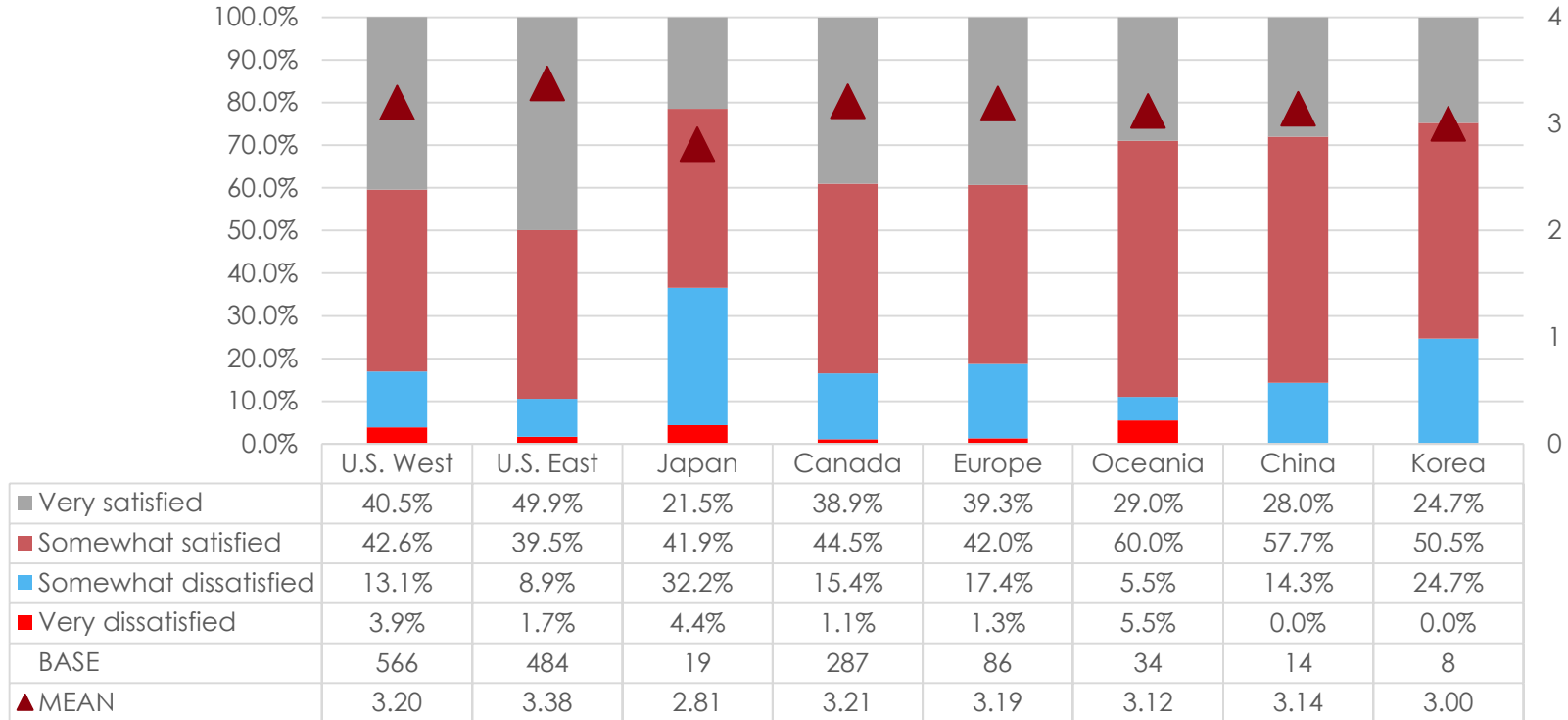
SATISFACTION – PARKS

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



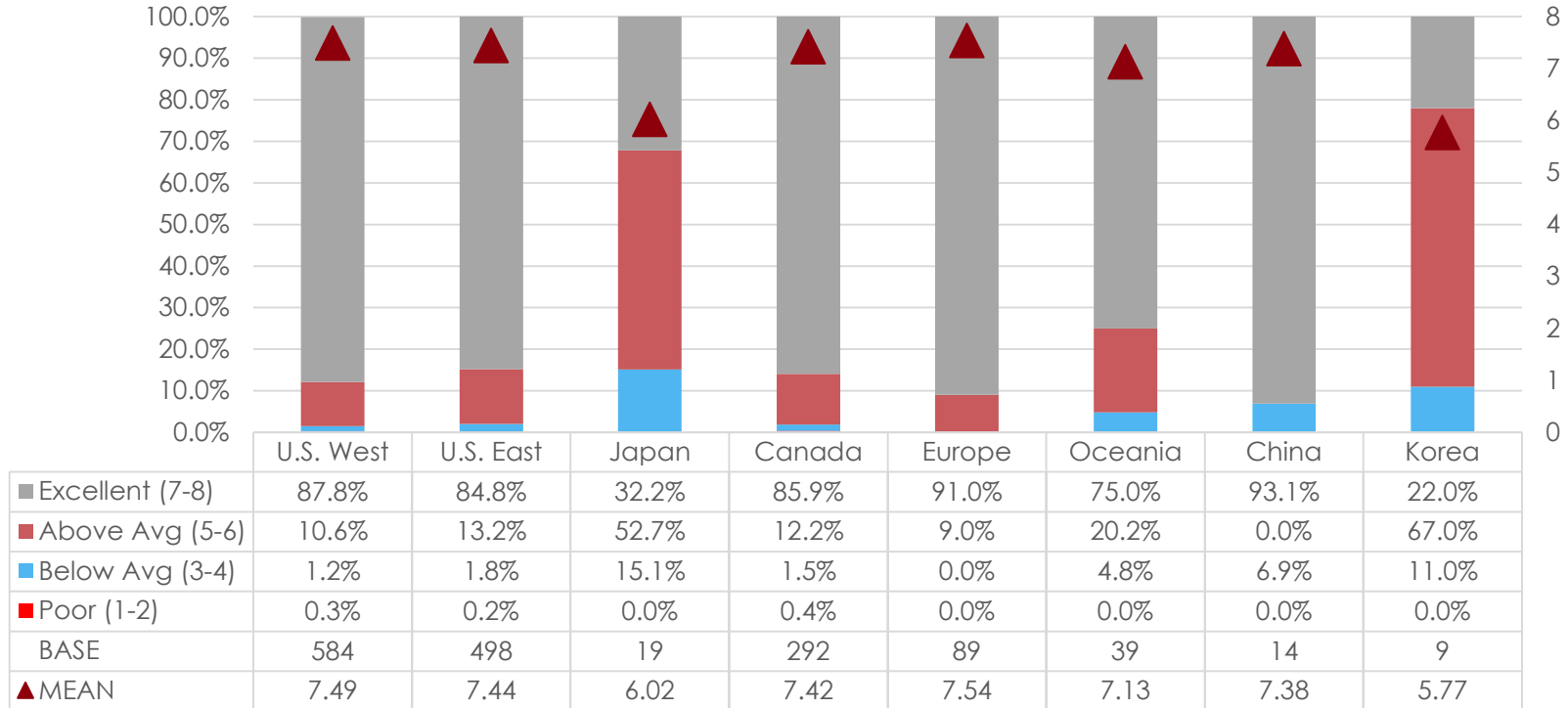
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

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



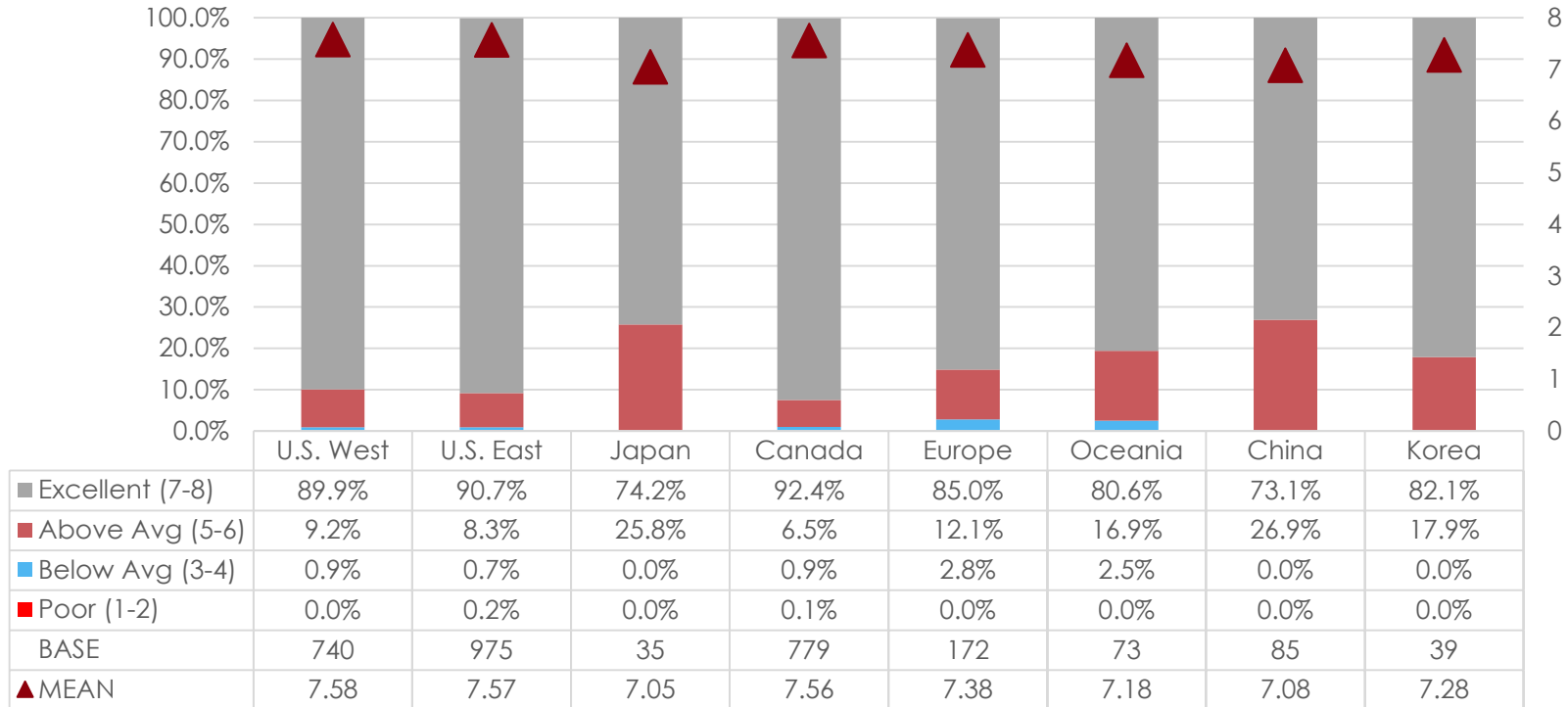
TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	46.8%	22.4%	21.5%	33.4%	15.1%	19.1%	14.3%	0.0%
Friend recommendation	26.1%	24.5%	26.9%	35.9%	36.1%	17.3%	28.6%	11.0%
Cruise line stop	3.5%	21.0%	16.1%	4.0%	7.3%	33.9%	6.9%	0.0%
Article/ blog	2.8%	5.0%	0.0%	5.3%	13.6%	0.0%	13.7%	45.0%
Visit friends/ family	3.8%	3.1%	4.4%	3.2%	0.9%	0.0%	0.0%	0.0%
Attending conference/ Event	3.1%	3.2%	0.0%	1.7%	0.0%	2.4%	0.0%	0.0%
Want to visit/ favorite	2.3%	2.2%	5.4%	2.3%	2.2%	4.8%	0.0%	0.0%
Travel agent	0.7%	4.7%	15.1%	1.2%	7.7%	8.9%	7.4%	44.0%
Social media post	1.6%	2.0%	10.7%	3.3%	5.2%	5.9%	14.3%	0.0%

SECTION – MAUI

SATISFACTION – MAUI

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



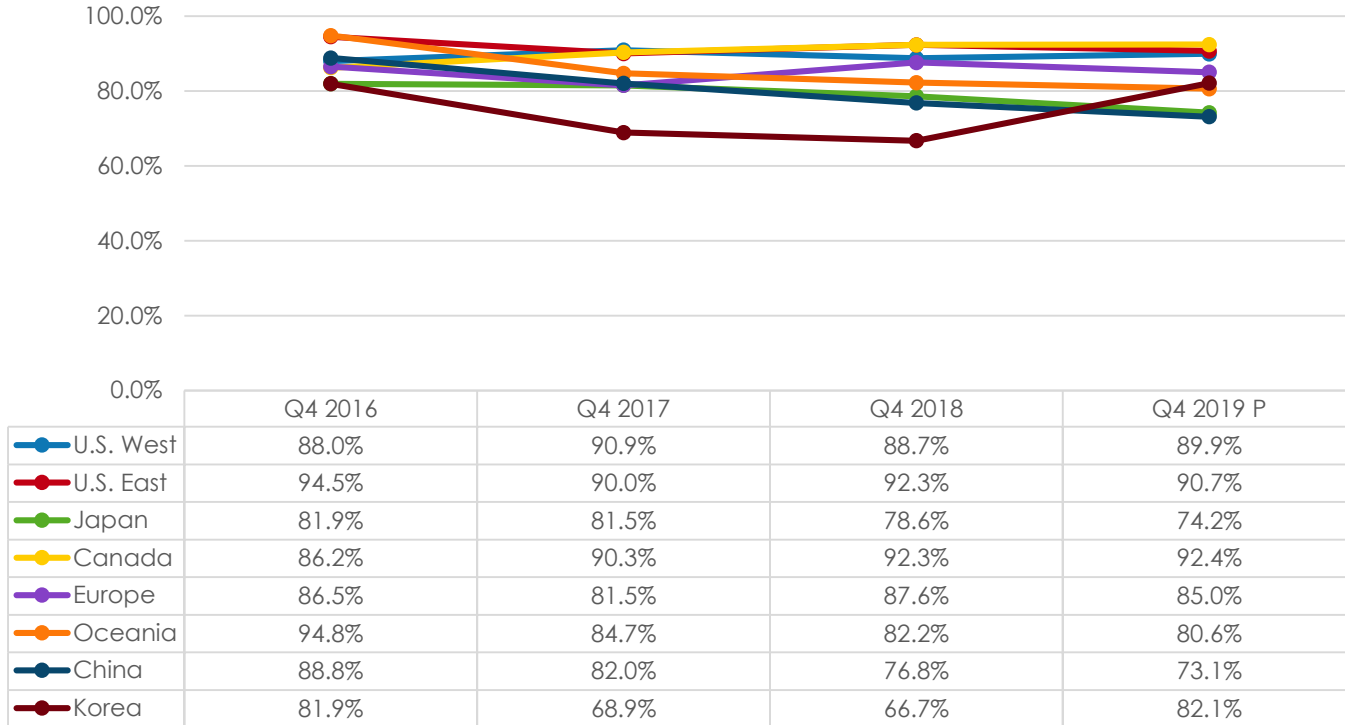
SATISFACTION – MAUI

COMPARISON OF MEAN SCORES

- **Only visited Maui:** Those from U.S. West and U.S. East who visited only Maui during this most recent trip tended to give the island higher satisfaction scores than those who also visited other islands during their stay from this visitor market.
- **Age:** Younger travelers from U.S. East give Maui higher satisfaction scores than older travelers from this visitor market.
- **Gender:** Female travelers from U.S. East and Canada were also more satisfied with their stay on Maui than were males.
- **College graduates:** More educated travelers from Korea tended to be more satisfied with their stay on Maui compared to visitors from this market without a college degree.

SATISFACTION – MAUI

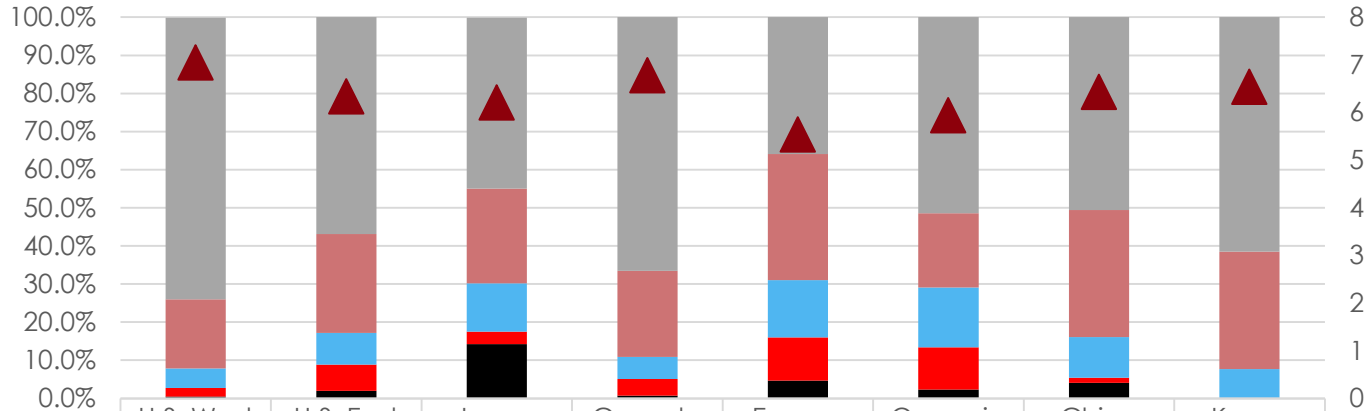
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – MAUI

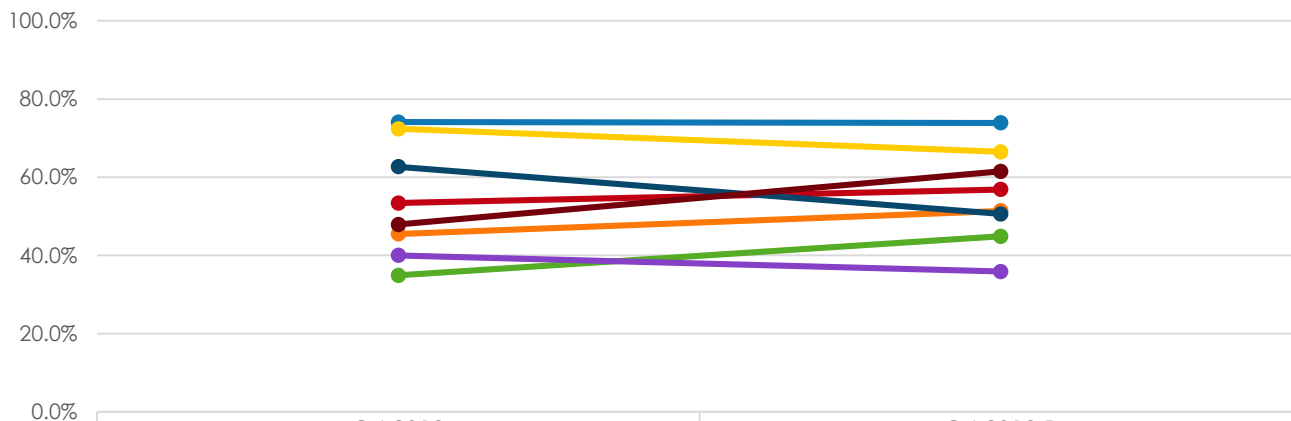
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	73.9%	56.9%	44.9%	66.5%	35.9%	51.4%	50.6%	61.5%
Somewhat likely (5-6)	18.1%	25.9%	24.8%	22.6%	33.1%	19.5%	33.3%	30.8%
Somewhat unlikely (3-4)	5.2%	8.3%	12.7%	5.8%	15.0%	15.7%	10.7%	7.7%
Very unlikely (1-2)	2.2%	6.9%	3.3%	4.4%	11.3%	11.1%	1.3%	0.0%
Not sure	0.5%	2.0%	14.2%	0.7%	4.7%	2.3%	4.1%	0.0%
BASE	629	700	32	686	106	50	75	39
MEAN	7.05	6.34	6.21	6.78	5.54	5.94	6.43	6.54

LIKELIHOOD OF RETURN VISIT – MAUI

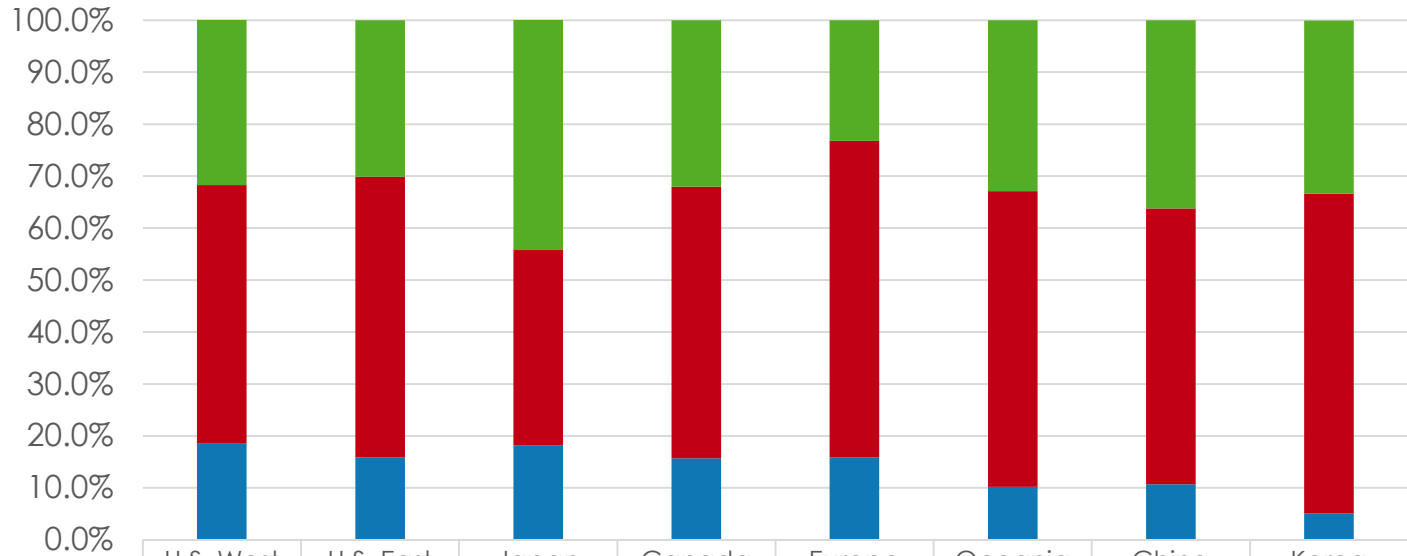
TOP BOX – VERY LIKELY (7-8)



	Q4 2018	Q4 2019 P
U.S. West	74.1%	73.9%
U.S. East	53.4%	56.9%
Japan	34.9%	44.9%
Canada	72.4%	66.5%
Europe	40.0%	35.9%
Oceania	45.5%	51.4%
China	62.7%	50.6%
Korea	47.9%	61.5%

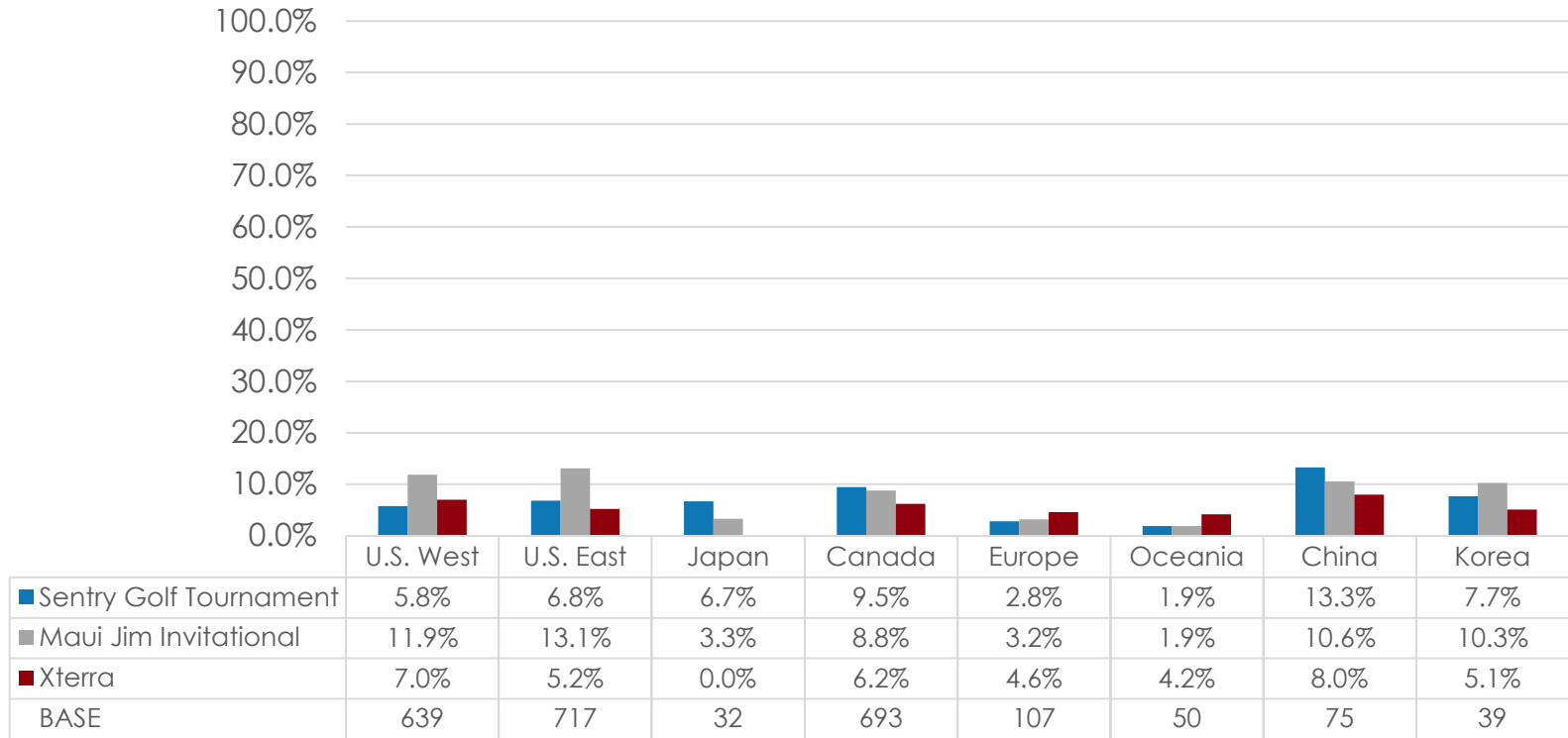
P= Preliminary Data

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Aided Ad Awareness	31.8%	30.1%	44.3%	32.0%	23.2%	32.9%	36.2%	33.3%
■ No Prior Awareness	49.8%	54.0%	37.6%	52.3%	60.9%	56.9%	53.1%	61.5%
■ Unsure	18.5%	15.9%	18.2%	15.7%	15.9%	10.2%	10.7%	5.1%
BASE	639	717	32	693	107	50	75	39

AIDED ADVERTISING AWARENESS – MAUI EVENTS



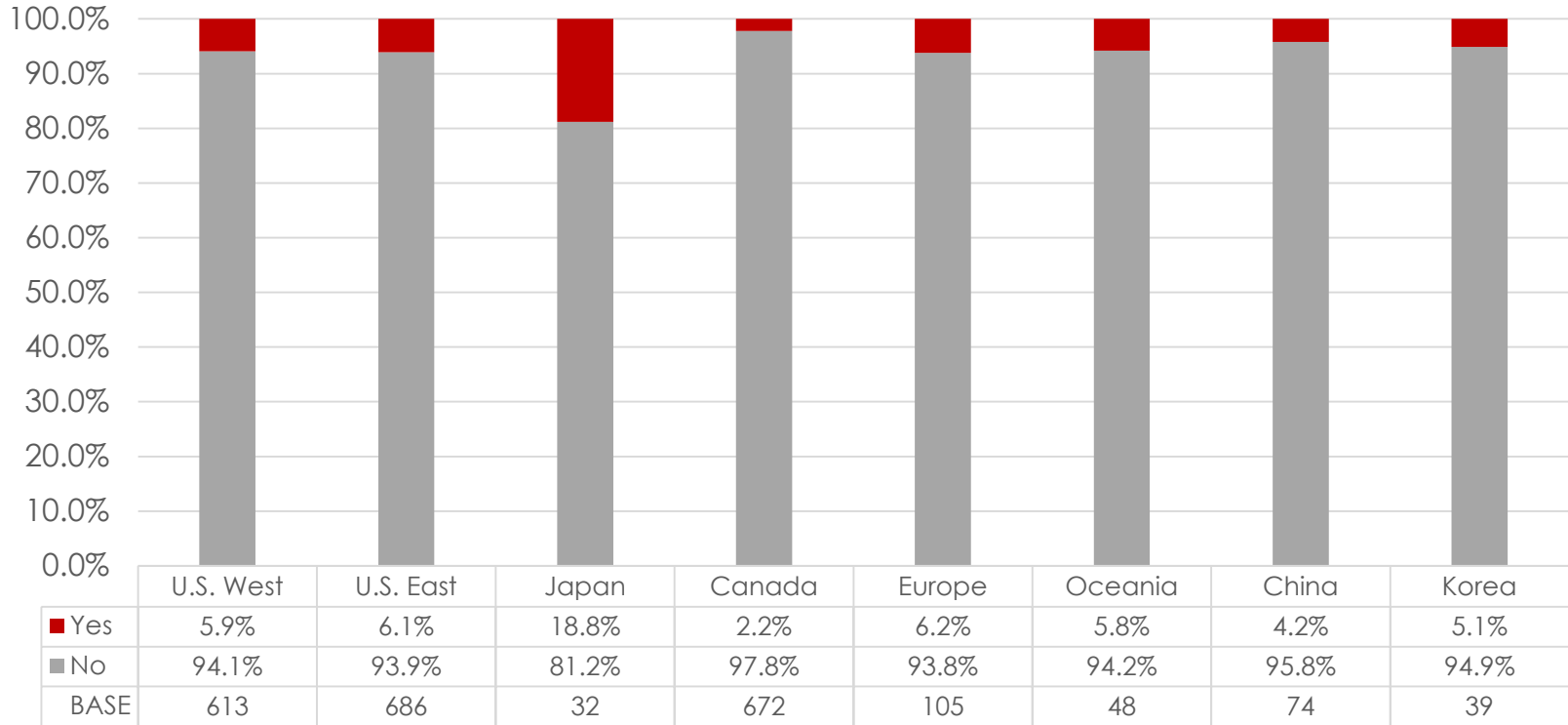
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
None of these	70.0%	65.7%	40.3%	63.3%	54.8%	76.9%	64.0%	43.6%
Hawaiian cultural events	10.6%	12.5%	11.5%	12.7%	5.3%	4.6%	9.2%	7.7%
Outdoor or sporting activities and events	16.3%	16.7%	30.3%	20.8%	23.0%	9.7%	13.4%	17.9%
Social media posts and videos	9.4%	13.7%	20.1%	10.6%	17.3%	8.8%	13.5%	33.3%
Hawaiian Music	8.1%	6.6%	0.0%	9.0%	4.6%	2.3%	5.3%	0.0%
TV programs/ Movies filmed in Hawaii	5.0%	8.8%	13.4%	9.3%	13.1%	4.6%	5.3%	5.1%

ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	3.8%	3.2%	0.0%	3.2%	2.1%	0.0%	5.4%	12.8%
Aquarium Maui /Maui Ocean Center	19.2%	18.9%	8.1%	23.2%	12.9%	6.0%	26.8%	5.1%
Baldwin Missionary Home Museum	6.6%	4.6%	3.3%	4.9%	8.6%	2.3%	5.4%	2.6%
Hale Pa'i Printing House	0.3%	0.6%	2.7%	0.2%	0.0%	0.0%	0.0%	0.0%
Haleakala National Park	29.8%	44.7%	30.9%	39.2%	55.6%	23.6%	44.2%	56.4%
Haleki'i-Pihana Heiau State Monument	2.1%	4.1%	6.7%	2.3%	1.1%	0.0%	1.3%	0.0%
Hana Cultural Center	9.6%	15.7%	9.4%	9.2%	19.9%	12.5%	12.2%	0.0%
'Iao Valley State Monument	14.6%	15.6%	13.4%	18.4%	17.5%	2.3%	2.6%	7.7%
Kepaniwai Park & Heritage Gardens	4.2%	5.3%	6.1%	4.2%	4.3%	7.9%	14.9%	0.0%
Kula Botanical Garden	7.7%	8.0%	6.7%	5.8%	8.9%	7.9%	12.0%	0.0%
Maui Historical Society Bailey House Museum	3.5%	4.7%	2.7%	2.5%	2.5%	2.3%	0.0%	2.6%
Whaler's Village Museum	17.4%	18.5%	6.7%	11.2%	12.2%	21.8%	8.0%	0.0%
Wo Hing Temple Museum	1.8%	2.9%	0.0%	1.9%	3.2%	2.3%	8.2%	0.0%

VISITED MAUI FOR SPECIFIC EVENT



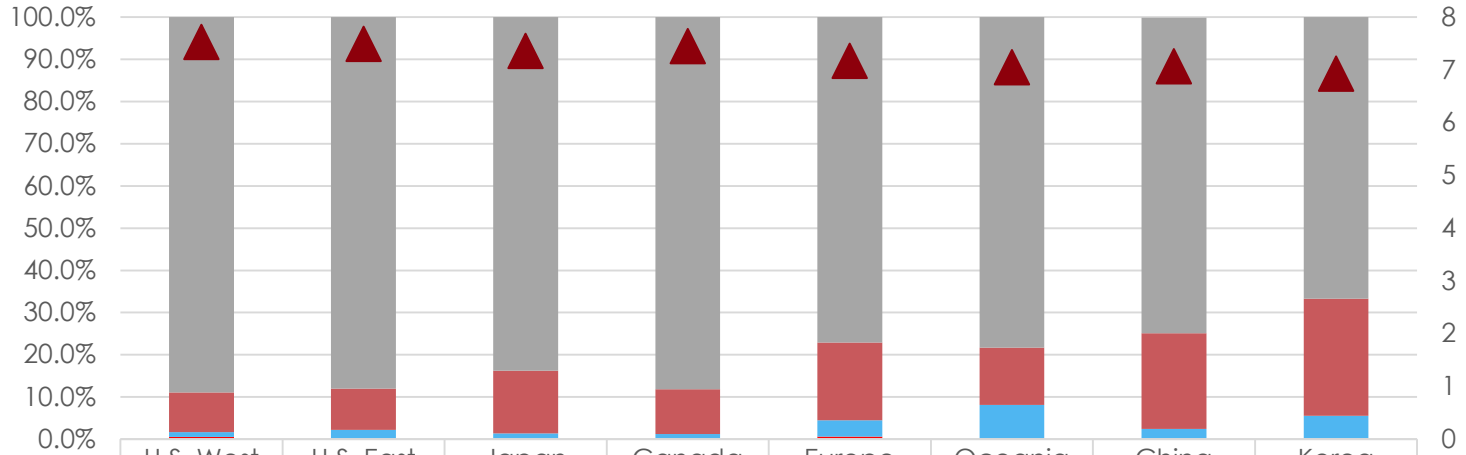
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	19.4%	23.5%	64.4%	5.4%	43.7%	0.0%	34.2%	0.0%
Wedding/ honeymoon, anniversary/ birthday/ funeral	22.2%	16.7%	0.0%	19.7%	0.0%	33.3%	0.0%	0.0%
Maui Jim Invitational	13.9%	22.2%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%
Maui Marathon	13.9%	9.8%	17.8%	14.3%	0.0%		34.2%	0.0%
Other festival/ concert	13.9%	9.4%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%
Other	2.8%	11.5%	17.8%	7.1%	0.0%	0.0%	0.0%	0.0%
Hawaii Food & Wine Festival	5.6%	2.1%	0.0%	0.0%	14.6%	0.0%	31.6%	100.0%
Xterra	2.8%	0.0%	0.0%	26.8%	20.9%	0.0%	0.0%	0.0%
Kapalua Food & Wine Festival	2.8%	2.6%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%
Other sporting event	2.8%	0.0%	0.0%	14.3%	20.9%	0.0%	0.0%	0.0%
Maui Film Festival	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

SECTION – ISLAND OF HAWAI‘I

SATISFACTION – ISLAND OF HAWAI‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	88.9%	88.0%	83.9%	88.2%	77.2%	78.3%	74.8%	66.7%
■ Above Avg (5-6)	9.4%	9.8%	14.8%	10.6%	18.4%	13.6%	22.7%	27.8%
■ Below Avg (3-4)	1.2%	2.2%	1.4%	1.2%	3.9%	8.1%	2.4%	5.5%
■ Poor (1-2)	0.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
BASE	597	722	446	382	134	48	170	54
▲ MEAN	7.53	7.49	7.36	7.45	7.17	7.05	7.07	6.93

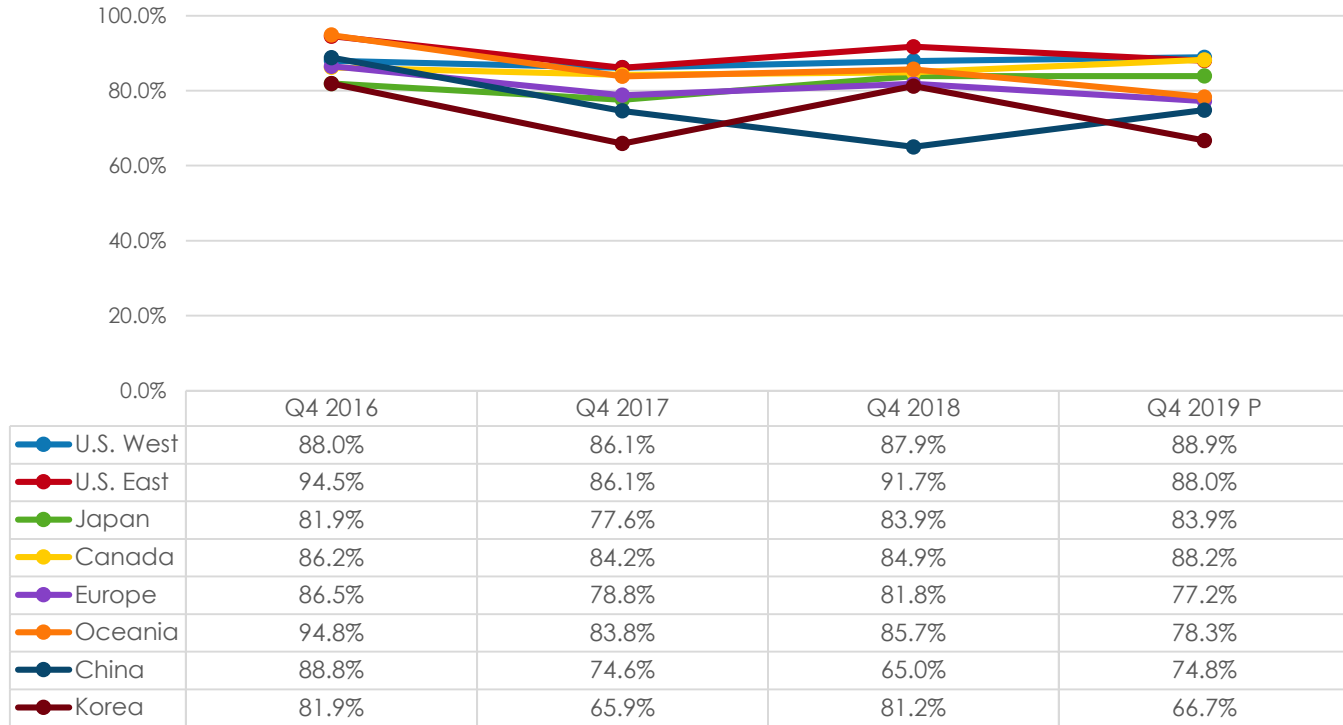
SATISFACTION – ISLAND OF HAWAI‘I

COMPARISON OF MEAN SCORES

- **Visited only Hawai‘i Island:** Those travelers who only visited Hawai‘i Island during this trip were more satisfied overall than those visiting multiple islands.
- **Gender:** Female travelers from U.S. West and U.S. East were more satisfied with their stay on Hawai‘i Island than were males.

SATISFACTION – ISLAND OF HAWAI‘I

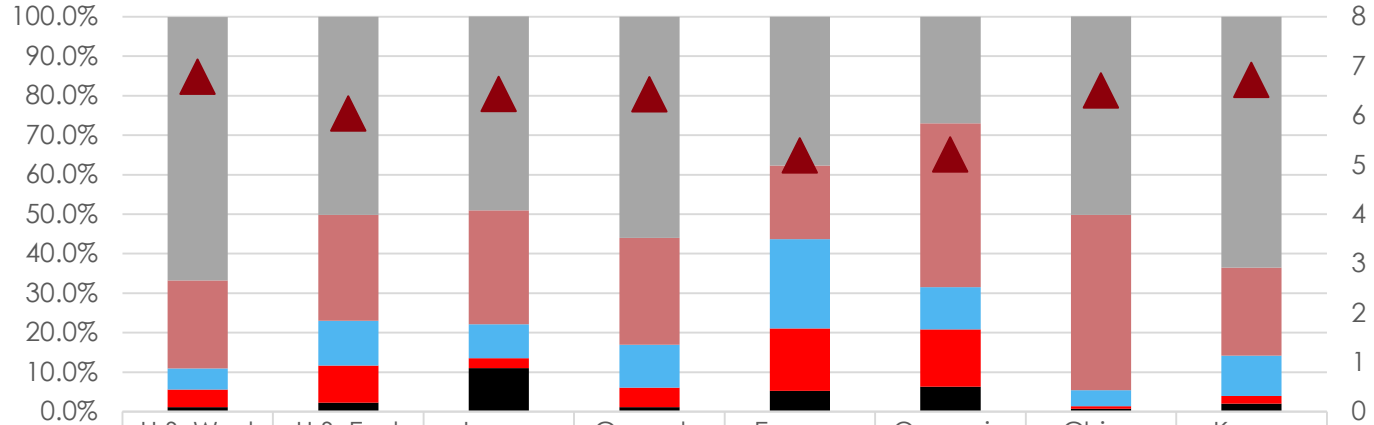
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

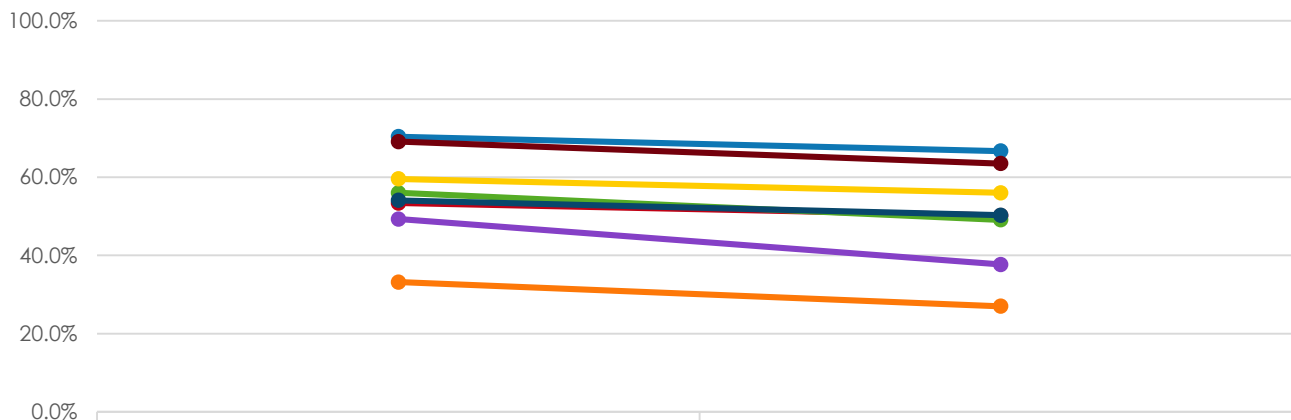
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	66.7%	50.2%	49.1%	56.0%	37.7%	27.0%	50.3%	63.5%
■ Somewhat likely (5-6)	22.3%	26.8%	28.9%	27.1%	18.6%	41.5%	44.4%	22.3%
■ Somewhat unlikely (3-4)	5.3%	11.3%	8.6%	10.8%	22.6%	10.7%	4.0%	10.2%
■ Very unlikely (1-2)	4.5%	9.4%	2.5%	5.0%	15.8%	14.5%	0.7%	2.0%
■ Not sure	1.1%	2.3%	11.0%	1.1%	5.3%	6.3%	0.7%	2.0%
BASE	529	503	425	338	85	34	150	49
▲ MEAN	6.79	6.04	6.44	6.43	5.19	5.21	6.51	6.72

LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

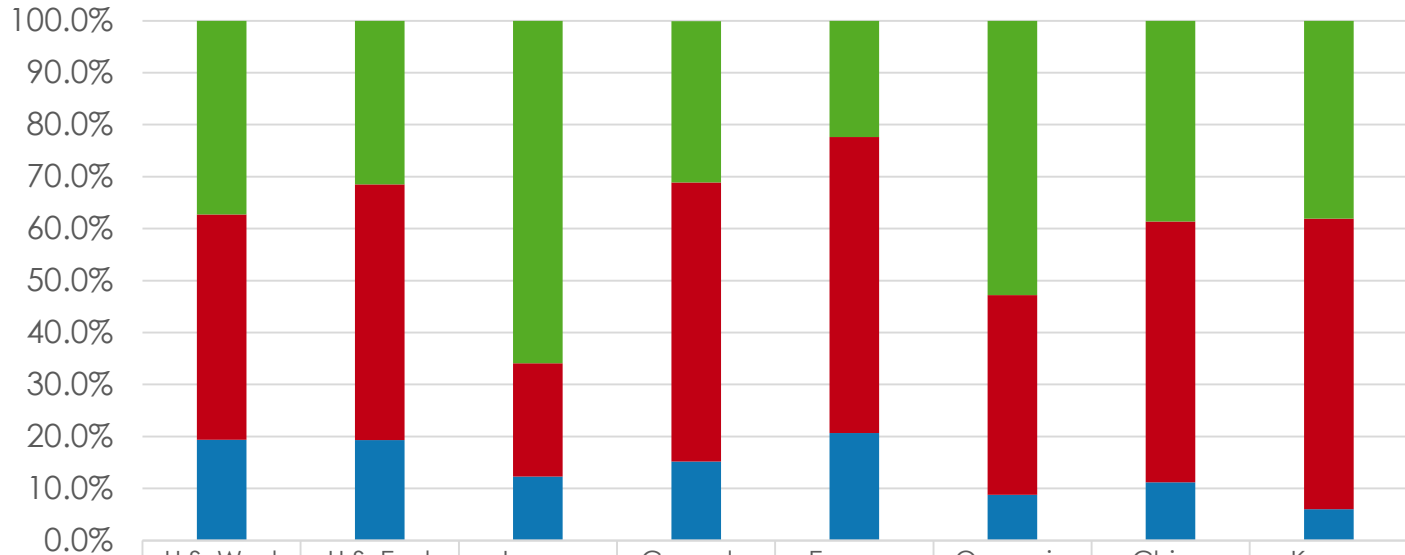
TOP BOX – EXCELLENT (7-8)



	Q4 2018	Q4 2019 P
U.S. West	70.4%	66.7%
U.S. East	53.4%	50.2%
Japan	56.0%	49.1%
Canada	59.6%	56.0%
Europe	49.3%	37.7%
Oceania	33.2%	27.0%
China	54.1%	50.3%
Korea	69.1%	63.5%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	37.3%	31.5%	65.9%	31.0%	22.4%	52.8%	38.6%	38.1%
No Prior Awareness	43.3%	49.2%	21.8%	53.7%	56.9%	38.4%	50.2%	55.9%
Unsure	19.4%	19.3%	12.3%	15.2%	20.7%	8.8%	11.2%	6.0%
BASE	536	510	425	341	89	34	151	50

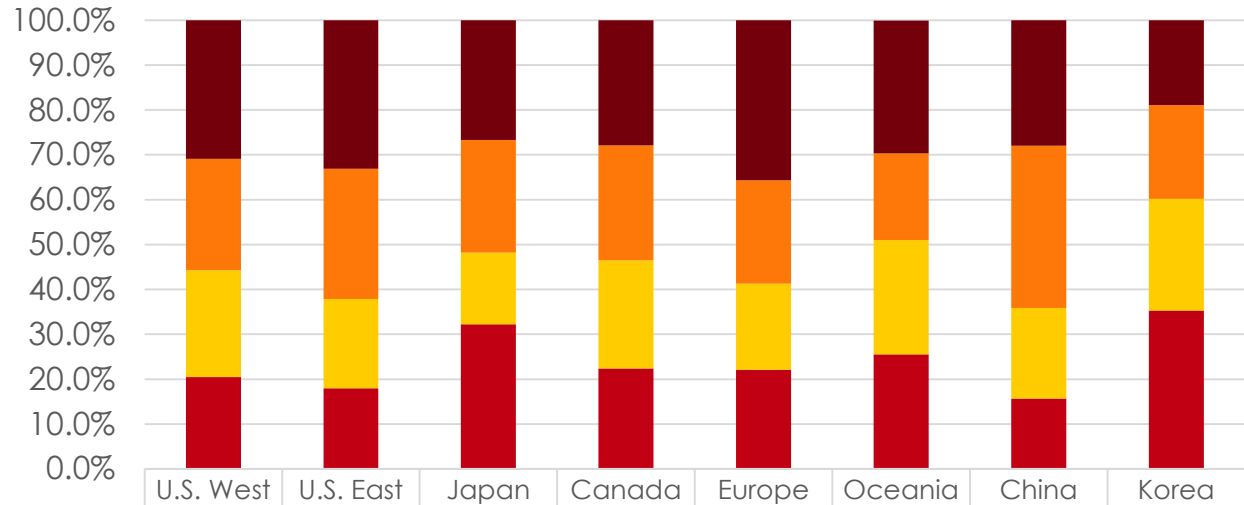
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
‘Akaka Falls	29.0%	31.8%	24.3%	31.8%	40.9%	31.2%	28.9%	30.6%
Botanical Gardens	19.5%	18.6%	4.4%	22.5%	33.0%	6.5%	21.1%	2.0%
H.N. Greenwell Store	3.0%	3.2%	1.4%	3.9%	2.3%	3.2%	2.1%	2.2%
Hawaii Volcanoes National Park	51.8%	63.9%	54.5%	52.7%	71.3%	55.8%	73.0%	59.2%
Hilo Farmers Market	26.4%	19.4%	17.1%	22.6%	21.4%	26.6%	16.3%	14.2%
Hulihe‘e Palace	7.6%	6.5%	7.7%	5.6%	3.6%	11.7%	4.8%	2.0%
‘Imiloa Astronomy Ctr	1.3%	1.8%	1.9%	0.7%	1.3%	0.0%	7.3%	2.0%
Kaloko-Honokohau National Historical Park	10.2%	12.0%	1.9%	12.7%	9.6%	6.5%	12.0%	2.0%
Kona Coffee Living History Farm	16.1%	20.9%	33.0%	19.9%	14.5%	18.8%	20.8%	44.7%
Lili‘uokalani Park and Garden	6.3%	10.4%	2.3%	5.9%	8.1%	5.2%	2.0%	8.1%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

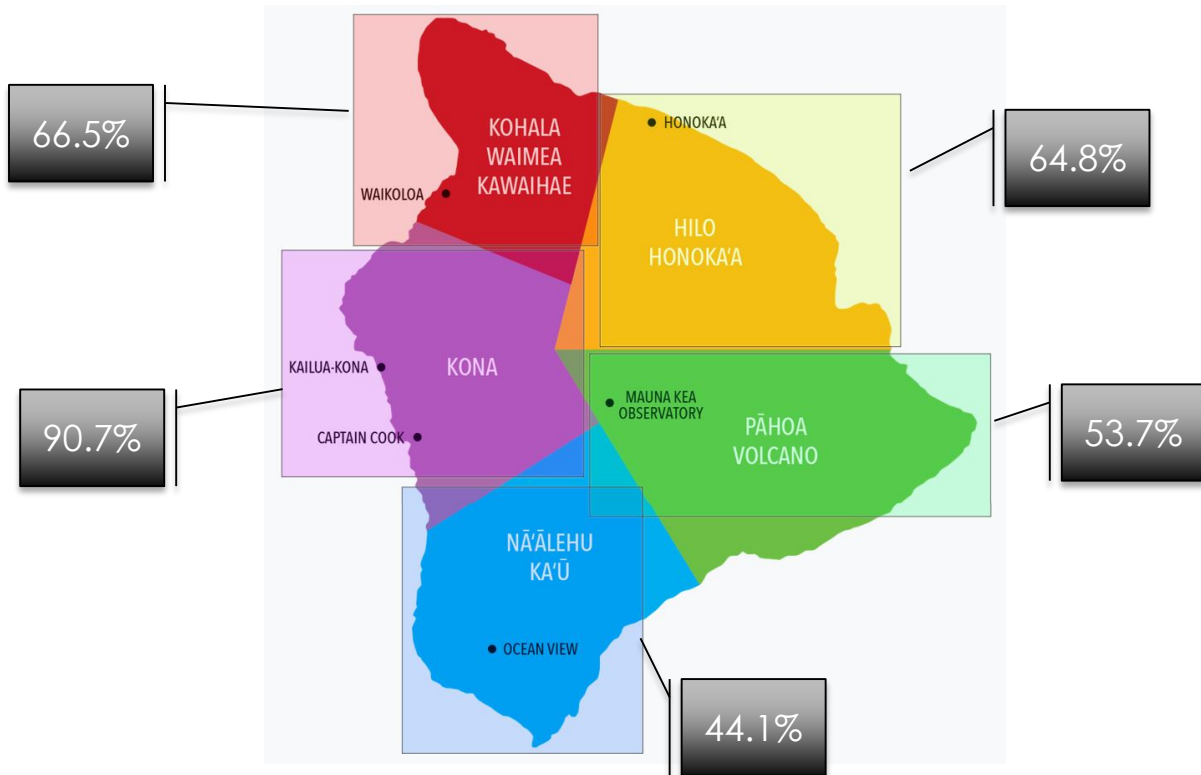
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Lyman House Memorial Museum	2.8%	0.8%	0.2%	1.4%	1.3%	5.8%	1.4%	4.1%
Maunakea	12.1%	14.0%	40.9%	13.8%	16.8%	11.7%	34.2%	26.4%
Orchid Farm	3.8%	3.7%	1.0%	4.2%	5.0%	5.8%	15.4%	2.0%
Pacific Tsunami Museum	3.4%	2.1%	1.2%	2.5%	4.0%	5.8%	2.7%	0.0%
Pana'ewa Rainforest Zoo & Garden	4.0%	2.2%	0.7%	3.5%	4.0%	0.0%	2.7%	2.0%
Pu'uhonua o Honaunau National Historical Park	20.5%	25.1%	4.4%	24.2%	21.4%	5.8%	3.4%	10.5%
Pu'ukohola Heia National Historical Site	12.7%	13.7%	3.0%	11.4%	8.2%	3.2%	3.5%	0.0%
Punalu'u Black Sand Beach	33.6%	40.2%	18.6%	35.6%	32.7%	27.9%	47.6%	6.3%
Rainbow Falls	28.3%	35.6%	21.8%	28.9%	28.5%	34.4%	46.1%	30.6%
Volcano Art Center	14.0%	9.4%	13.4%	9.4%	18.2%	5.8%	8.8%	14.2%

TRAVEL ON ISLAND OF HAWAI'I

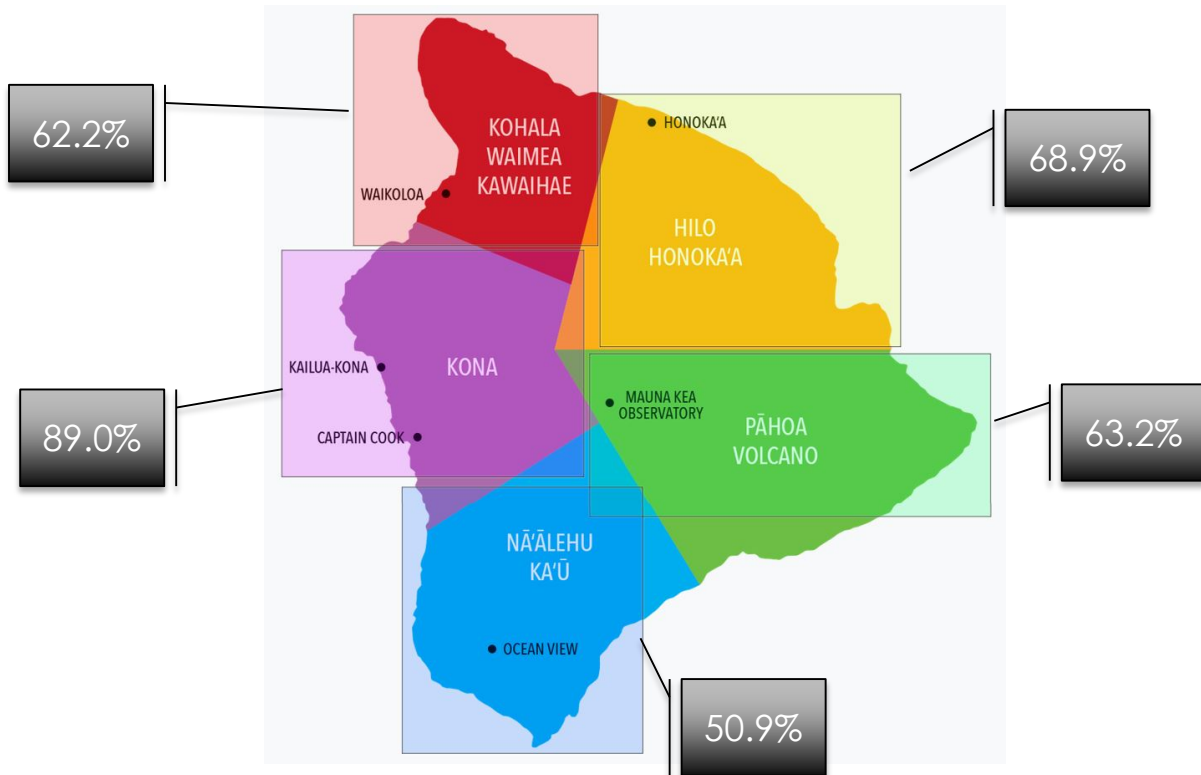


Traveled to other side of island	30.9%	33.1%	26.7%	27.9%	35.7%	29.6%	28.0%	18.9%
Traveled more than 1 hour	24.8%	29.0%	25.1%	25.6%	23.0%	19.3%	36.1%	20.9%
Traveled 1 hour or less one way to reach activity	23.8%	19.9%	16.0%	24.1%	19.2%	25.5%	20.2%	24.9%
Enjoy activities- short drive from accommodations	20.5%	18.0%	32.2%	22.4%	22.1%	25.5%	15.7%	35.3%
BASE	512	491	424	325	79	31	148	48

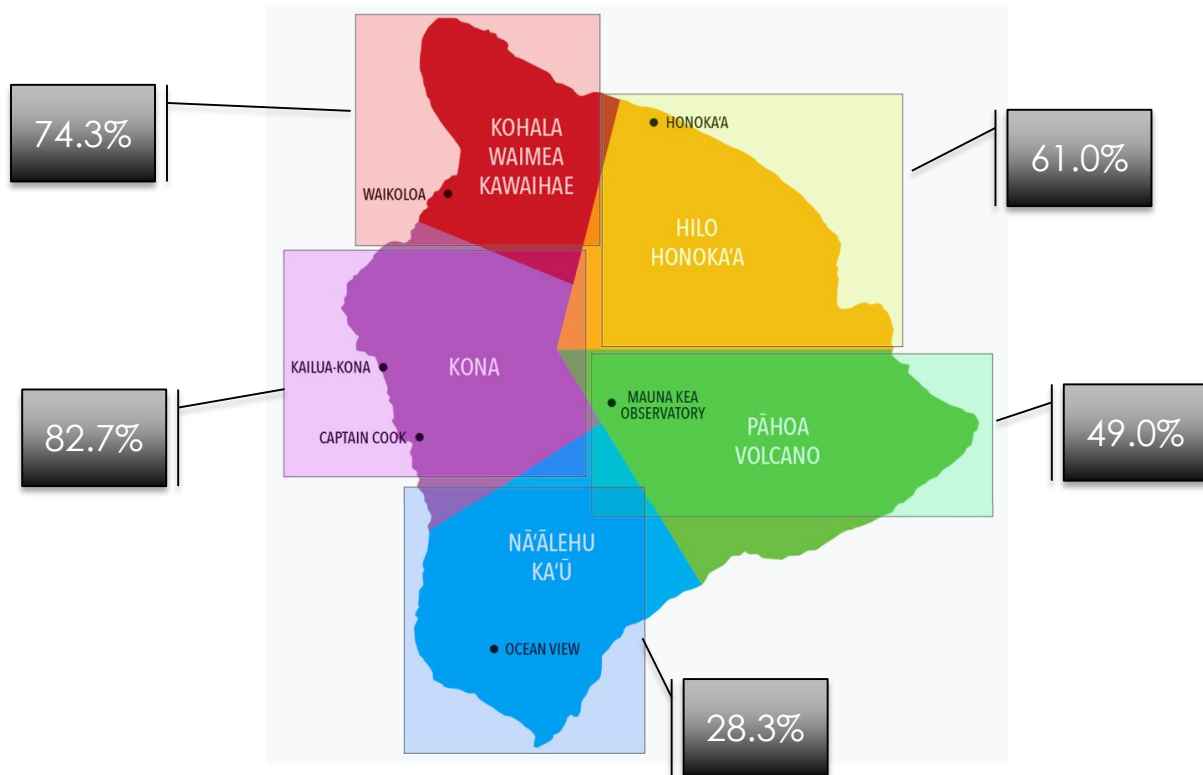
AREAS VISITED U.S. WEST



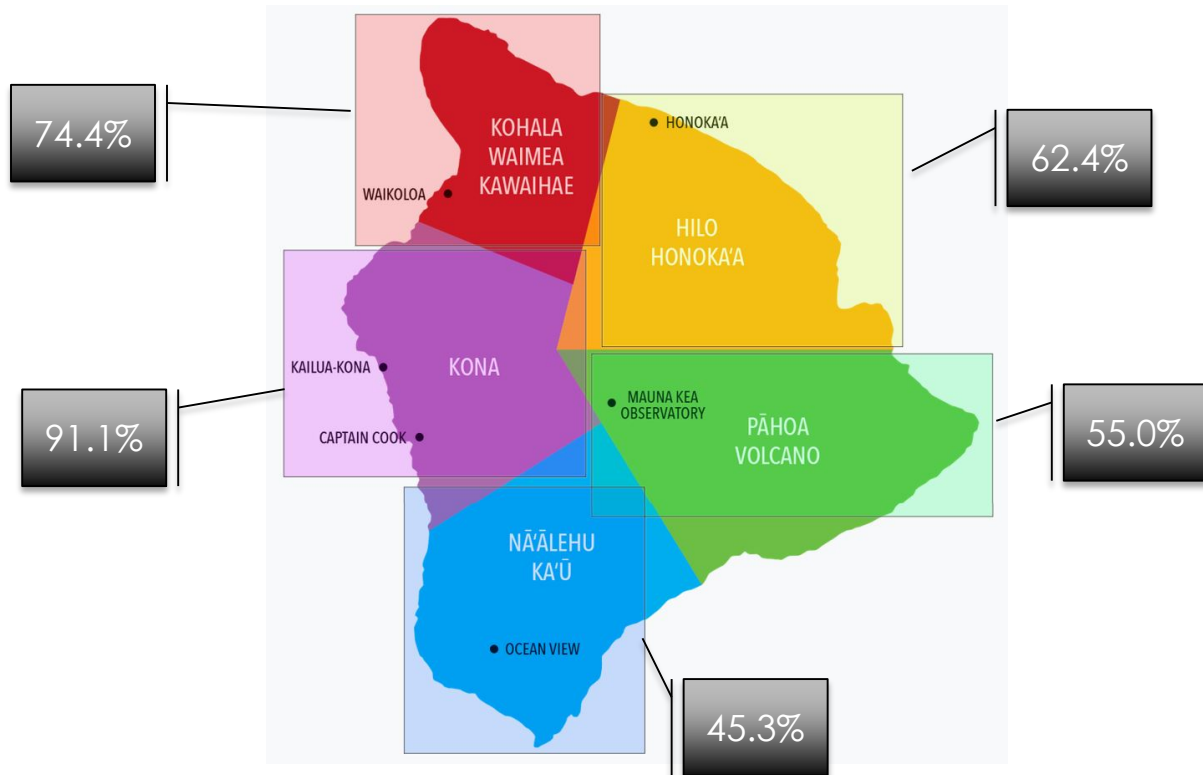
AREAS VISITED U.S. EAST



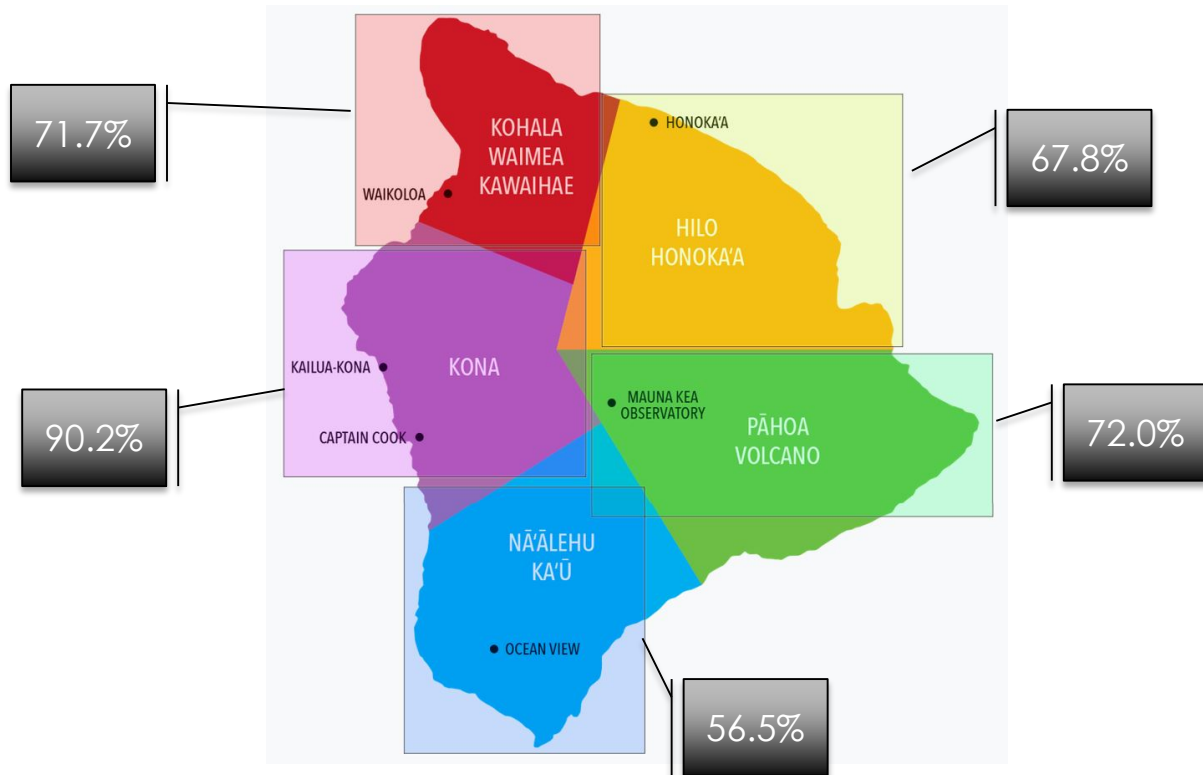
AREAS VISITED JAPAN



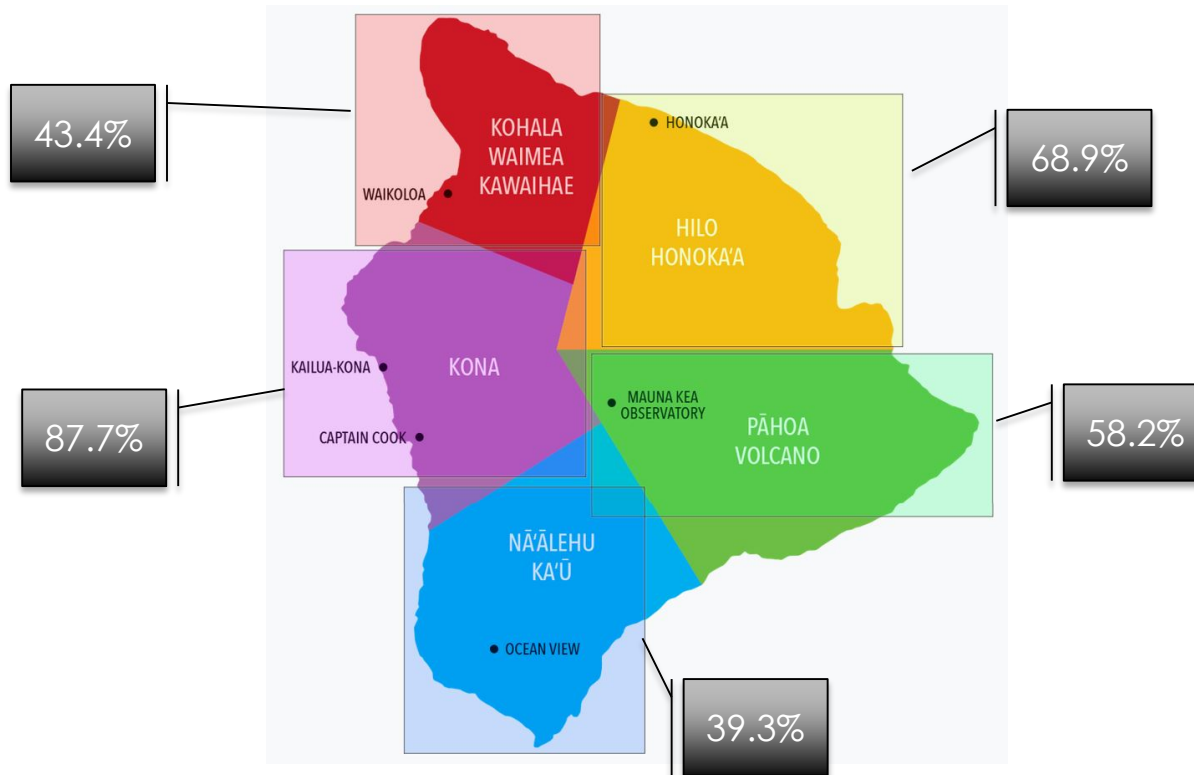
AREAS VISITED CANADA



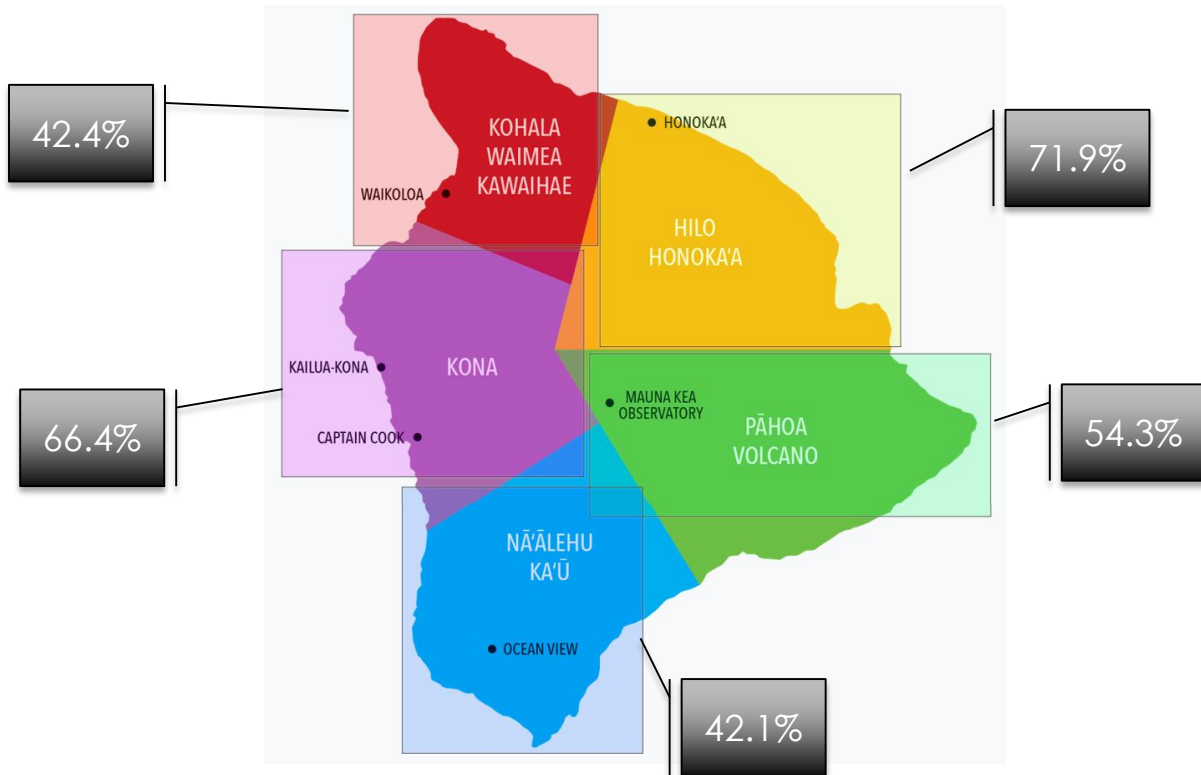
AREAS VISITED EUROPE



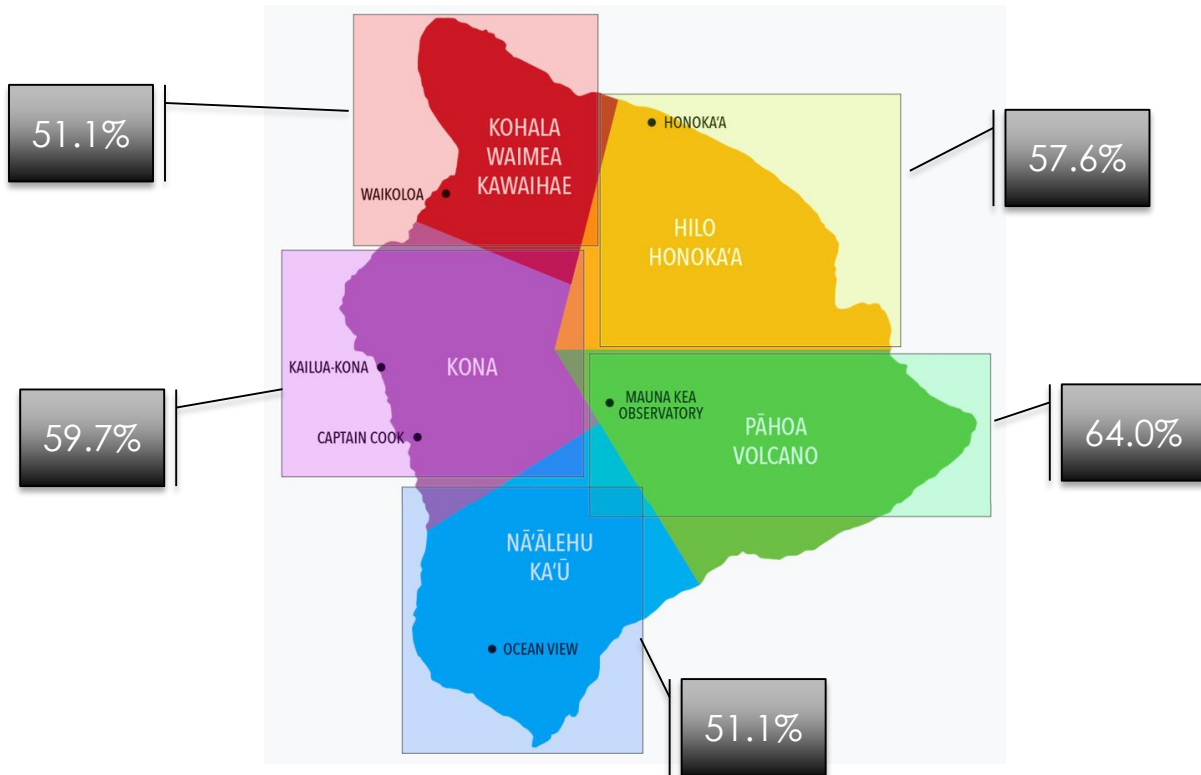
AREAS VISITED OCEANIA



AREAS VISITED CHINA



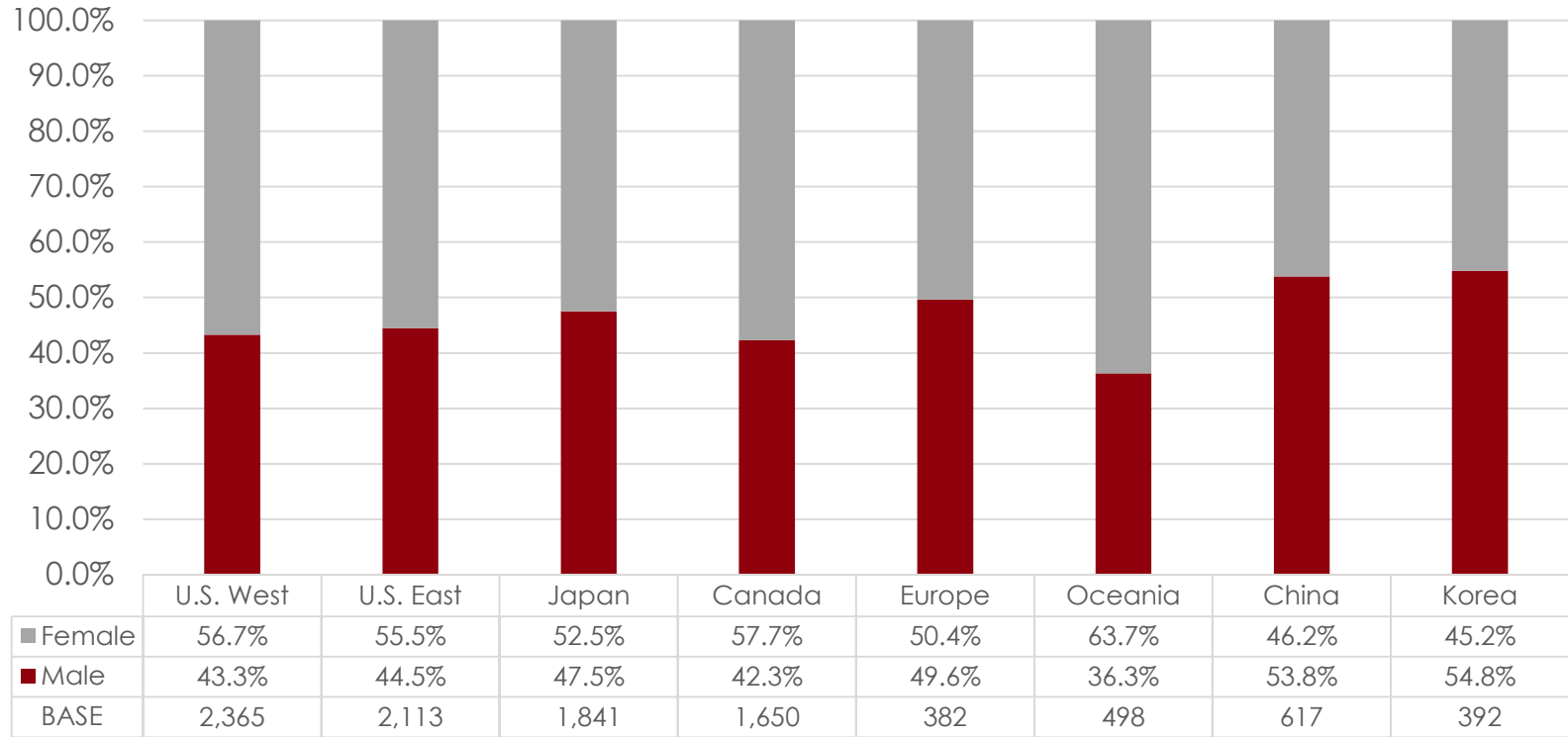
AREAS VISITED KOREA



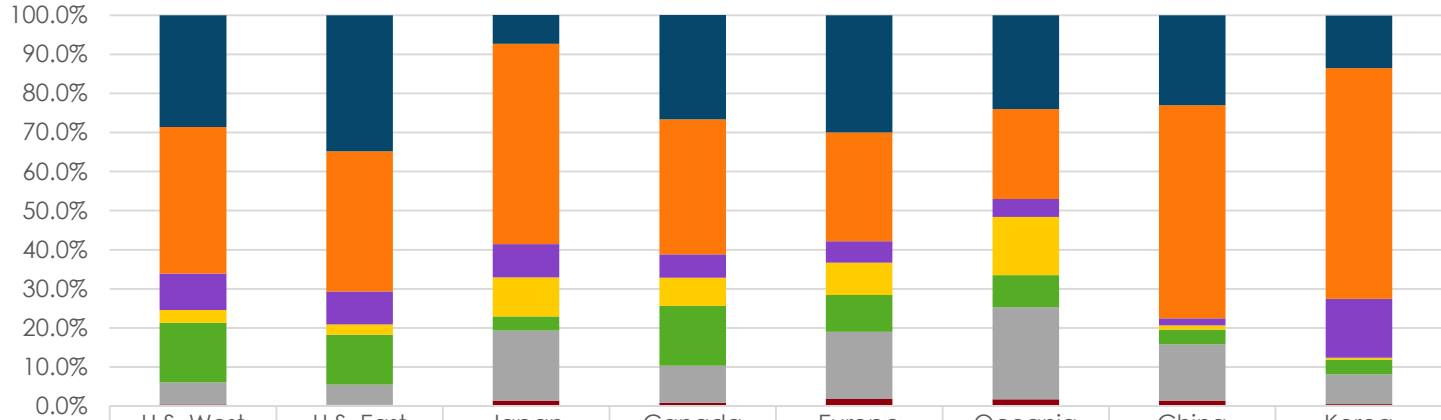
111 Q Which of the following areas did you visit during your stay on Hawai'i Island?

SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Post-Graduate	28.6%	34.8%	7.4%	26.7%	30.0%	24.0%	23.0%	13.4%
■ College Grad	37.5%	35.9%	51.3%	34.6%	27.8%	23.0%	54.6%	59.1%
■ Associate Degree	9.3%	8.4%	8.5%	6.0%	5.5%	4.6%	1.8%	15.0%
■ Vocational/ Tech	3.3%	2.6%	10.0%	7.2%	8.3%	14.9%	1.0%	0.5%
■ Some College	15.2%	12.8%	3.6%	15.3%	9.4%	8.2%	3.8%	3.8%
■ H.S. Grad	5.7%	5.2%	17.9%	9.5%	17.2%	23.6%	14.4%	7.6%
■ Some / No H.S.	0.4%	0.3%	1.4%	0.8%	1.8%	1.7%	1.4%	0.5%
BASE	2,356	2,108	1,838	1,644	381	498	616	392

VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	5.2%	5.7%	6.0%	16.7%	7.2%
\$40,000 to \$59,999	7.8%	7.3%	8.6%	14.0%	10.3%
\$60,000 to \$79,999	9.5%	11.8%	9.9%	12.6%	13.9%
\$80,000 to \$99,999	10.8%	9.6%	11.3%	11.1%	10.4%
\$100,000 to \$124,999	12.3%	14.4%	14.3%	9.1%	14.2%
\$125,000 to \$149,999	11.8%	12.1%	13.1%	8.2%	11.3%
\$150,000 to \$174,999	9.0%	8.8%	10.0%	7.2%	10.6%
\$175,000 to \$199,999	6.0%	6.2%	6.0%	6.6%	6.3%
\$200,000 to \$249,999	9.8%	8.6%	8.7%	6.8%	6.7%
\$250,000 +	17.9%	15.5%	12.3%	7.7%	9.1%

VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	18.8%
¥3.5 - ¥4.5 million	16.8%
¥4.5 - ¥5.5 million	12.0%
¥5.5 - ¥6.5 million	8.3%
¥6.5 - ¥7.5 million	6.3%
¥7.5 - ¥8.5 million	7.5%
¥8.5 - ¥10.0 million	9.5%
¥10.0 - ¥15.0 million	12.9%
¥15.0 - ¥20.0 million	3.4%
¥20.0 million +	4.6%

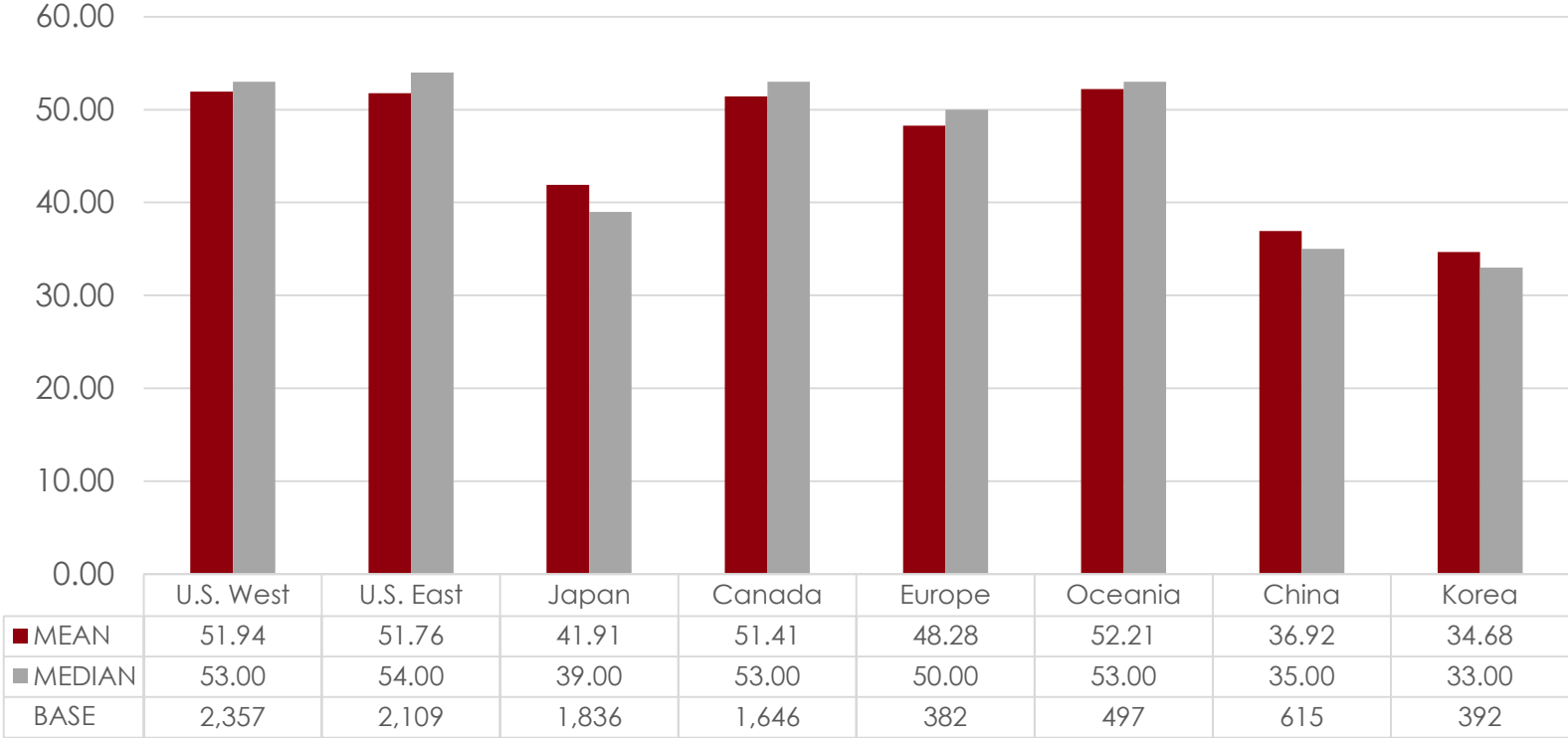
VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	7.1%
₩16,305,000-21,171,999	11.1%
₩27,174,000-38,041,999	19.4%
₩38,044,000-48,911,999	12.4%
₩48,912,000-59,781,999	9.8%
₩59,782,000-70,652,999	13.1%
₩70,653,000-81,520,999	9.3%
₩81,521,000-92,390,999	5.6%
₩92,391,000-103,259,999	3.6%
₩103,260,000+	8.8%

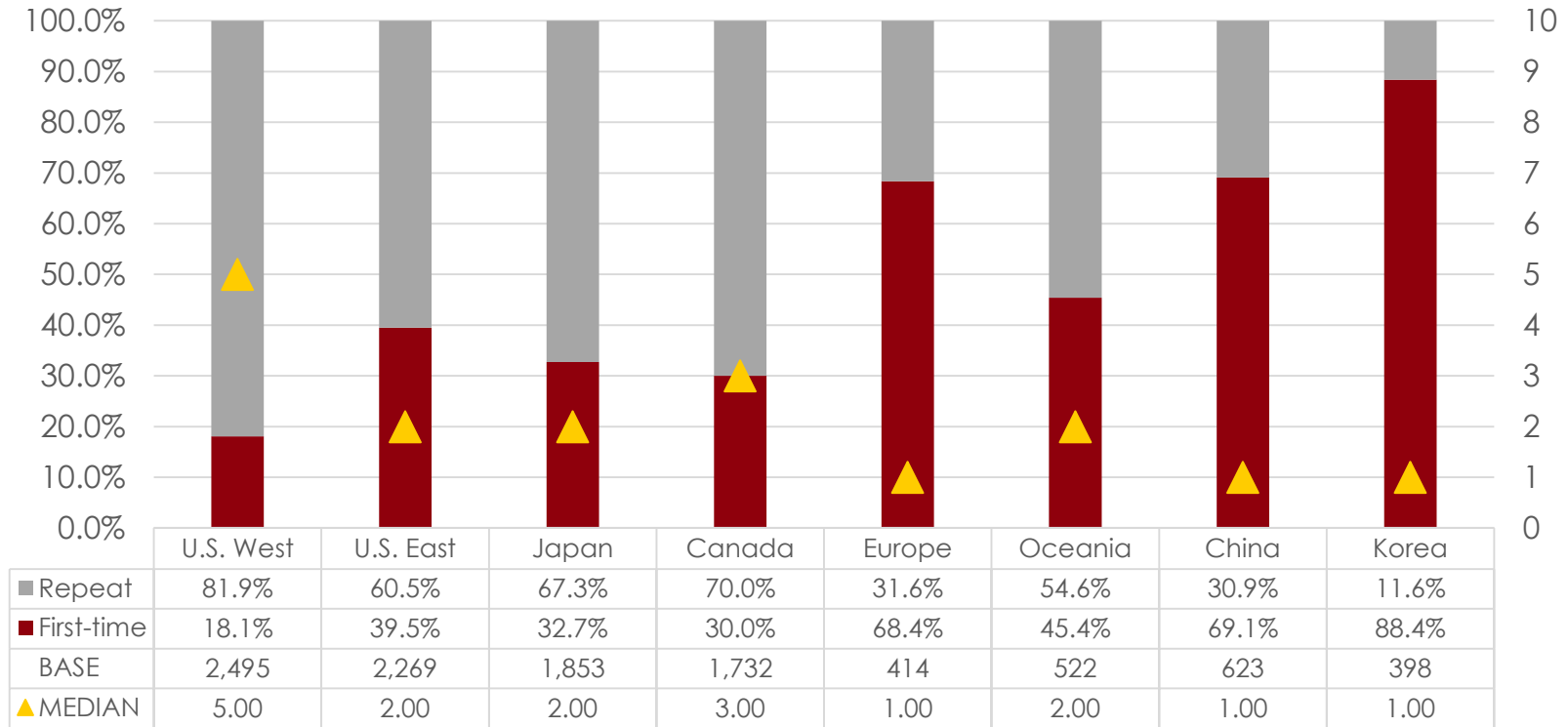
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	37.1%
¥250,800 - ¥376,099	22.4%
¥376,100 - ¥501,399	14.4%
¥501,400 - ¥626,799	6.3%
¥626,800 - ¥783,499	3.3%
¥783,500 - ¥940,199	5.7%
¥940,200 - ¥1,096,899	2.8%
¥1,096,900 - ¥1,253,599	2.6%
¥1,253,600 - ¥1,560,799	1.4%
¥1,560,800+	4.2%

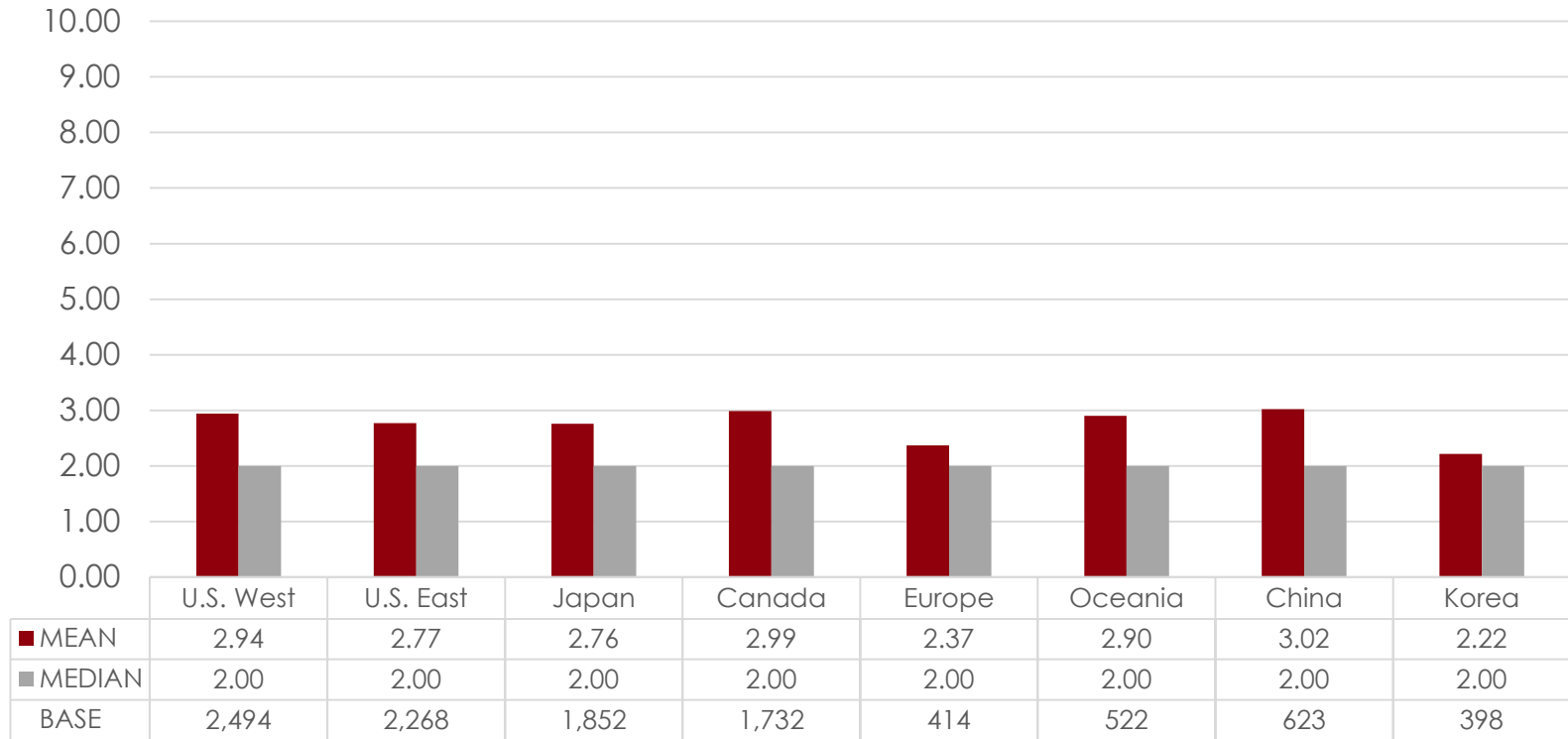
VISITOR PROFILE – AGE



VISITOR PROFILE – TRIPS TO HAWAI‘I



VISITOR PROFILE – TRAVEL PARTY SIZE



VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Spouse	61.1%	61.4%	54.0%	63.5%	46.5%	59.7%	32.6%	81.8%
Other adult family	26.6%	25.5%	20.9%	28.2%	18.3%	23.8%	20.0%	10.1%
Friend/ Associate	15.6%	17.1%	25.4%	17.1%	15.2%	15.0%	34.2%	9.5%
Child <18	20.4%	14.2%	8.0%	18.7%	8.4%	26.0%	10.0%	8.0%
Alone	9.7%	10.7%	6.1%	6.6%	15.0%	9.7%	12.0%	1.6%
Girlfriend/ boyfriend	7.9%	5.9%	3.4%	8.0%	15.4%	3.3%	9.3%	0.8%
Same-sex partner	1.7%	1.2%	0.3%	1.4%	0.8%	0.9%	1.3%	0.0%

SECTION – ISLAND SURVEY METHODOLOGY

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

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

MMA	Completed	Margin of Error \pm
US West	1,025	3.06
US East	1,312	2.71
Japan	1,511	2.52
Canada	621	3.93
Europe	277	5.89
Oceania	496	4.40
China	533	4.24
Korea	370	5.09
All MMAs	6,145	1.25

*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	615	3.95
US East	584	4.06
Japan	20	21.91
Canada	322	5.46
Europe	107	9.47
Oceania	46	14.45
China	14	26.19
Korea	10	30.99
All MMAs	1,718	2.36

*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	740	3.60
US East	975	3.14
Japan	35	16.56
Canada	779	3.51
Europe	172	7.47
Oceania	73	11.47
China	85	10.63
Korea	39	15.69
All MMAs	2,898	1.82

*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	597	4.01
US East	722	3.65
Japan	446	4.64
Canada	382	5.01
Europe	134	8.47
Oceania	48	14.15
China	170	7.52
Korea	54	13.34
All MMAs	2,553	1.94

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