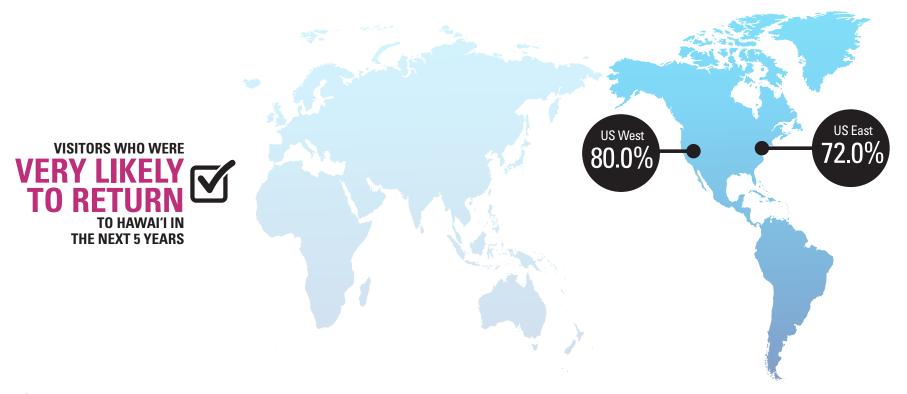


HAWAI'I TOURISM Visitor Satisfaction Survey

Third Quarter 2020



Visitor Profile by MMA

Average Age
Affluent Households
Education

US West	US East
47	45
20%	16%
\$200K+	\$200K+
33%	34%
College	College
Grad	Grad

EFFECTS OF COVID-19

Starting on Thursday, March 26, 2020, the State of Hawai'i required all visitors and returning residents to Hawai'i to complete a mandatory, 14-day guarantine to prevent the spread of COVID-19. As a result, transpacific travel to the islands dropped by an average of 99% from a year earlier. COVID-19 led to considerable reduction of air service to Hawai'i from U.S. West and U.S. East and suspension of direct air service from Japan, Canada, Oceania, China and Korea.

Nearly all incoming visitors to the islands in Q3 2020 were from the U.S. Mainland. Therefore, the Visitor Satisfaction and Activity Survey was collected only among visitors from the U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming) and U.S. East (all other states in the Continental U.S.).

When reviewing this data and comparing to prior periods, please note the comparatively small sample sizes and corresponding margins of error.

- U.S. West: 690 completed surveys, +/-3.73% margin of error*
- U.S. East: 582 completed surveys, +/-4.06% margin of error*

*Margins of error presented at the 95% level of confidence. **MARKET AREA SNAPSHOT:** MAUI **TOP ATTRACTION 62%** rated trip "Excellent" KAUAI 87% very likely 69% rated to return in the trip "Excellent" next five years O'AHU 94% very likely **NATIONAL PARK** KAUAʻI to return in the **19**% 48% rated HANALEI next five years trip "Excellent" TOWN/BEACH 46% 75% very likely **ISLAND OF HAWAI'I** to return in the **62%** rated next five years trip "Excellent" ISLAND OF HAWAI'I **HAWAI'I VOLCANOES** 0'AHU 94% very likely **NATIONAL PARK NORTH SHORE** to return in the **BEACHES 26**% next five years 19%