Visitor Satisfaction Survey
Second Quarter 2022

VISITORS WHO SAID THEY WERE LIKELY TO RETURN TO HAWAI’I IN THE NEXT FIVE YEARS

Canada 88.5%
US West 94.4%
US East 84.6%

Visitor Profile by MMA

<table>
<thead>
<tr>
<th>MARKET AREA</th>
<th>US West</th>
<th>US East</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Age</td>
<td>49</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Affluent Households</td>
<td>31.8% $200K+</td>
<td>29.4% $200K+</td>
<td>28.2% $200K+</td>
</tr>
<tr>
<td>Education</td>
<td>38% College Grad</td>
<td>39% College Grad</td>
<td>40% College Grad</td>
</tr>
</tbody>
</table>

COVID-19 Travel Restrictions
Concerns around the continuing COVID-19 pandemic have resulted in significant travel restrictions and limited flights to Hawai’i from China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter. Resumption of additional flights from Canada enabled resulted in a sufficient number of visitors to Hawai’i for that market to be included in reporting for the Visitor Satisfaction Survey for the first time since Q1 2020.

The State of Hawaii’s Safe Travels program, which required visitors to the state to provide proof of a negative pre-travel COVID-19 test or show proof of vaccination, ended on March 26, 2022. International visitors were still required to comply with U.S. federal travel guidelines.

- U.S. West: 1,697 completed surveys, +/- 2.38% margin of error*
- U.S. East: 1,879 completed surveys, +/- 2.26% margin of error*
- Canada: 852 completed surveys, +/- 3.36% margin of error*

(*Margins of error shown at 95% level of confidence)

MARKET AREA SNAPSHOT: CANADA

KAUAI
- 91% rated trip “Excellent”
- 48% very likely to return in the next five years

O’AHU
- 83% rated trip “Excellent”
- 55% very likely to return in the next five years

MAUI
- 85% rated trip “Excellent”
- 61% very likely to return in the next five years

ISLAND OF HAWAI’I
- 85% rated trip “Excellent”
- 51% very likely to return in the next five years

TOP ATTRACTION BY ISLAND

- KAUA’I PO’IPU BEACH: 69%
- HALEAKALĀ NATIONAL PARK: 42%
- O’AHU NORTH SHORE BEACHES: 51%
- ISLAND OF HAWAI’I HAWAI’I VOLCANOES NATIONAL PARK: 58%

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