

VISITOR SATISFACTION STUDY QUARTER 1, 2024

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

Table of Contents

- Section 1 – Visitor Satisfaction (slide 5)
- Section 2 – Activities (slide 31)
- Section 3 – Travelers with Disabilities (slide 40)
- Section 4 – Alternative Messaging (slide 52)
- Section 5 – Island of O‘ahu (slide 59)
- Section 6 – Island of Kaua‘i (slide 78)
- Section 7 – Island of Maui (slide 101)
- Section 8 – Island of Hawai‘i (slide 124)
- Section 9 – Visitor Profile (slide 151)
- Section 10 – Island Survey Methodology (slide 162)

Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 1, 2024 report include survey results from: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, Europe, Korea and China.

| Visitor market | Completed | Margin of Error \pm | Response Rate |
|---------------------|-----------|-----------------------|---------------|
| U.S. West | 1,476 | 2.55 | 16.58% |
| U.S. East | 1,821 | 2.30 | 23.24% |
| Japan | 261 | 6.07 | 24.08% |
| Canada | 913 | 3.24 | 23.86% |
| Oceania | 279 | 5.87 | 16.38% |
| Korea | 247 | 6.24 | 42.73% |
| China | 46 | 14.45 | 5.71% |
| Europe | 495 | 4.40 | 14.75% |
| All visitor markets | 5,538 | 1.32 | 19.71% |

Survey Methodology (cont.)

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

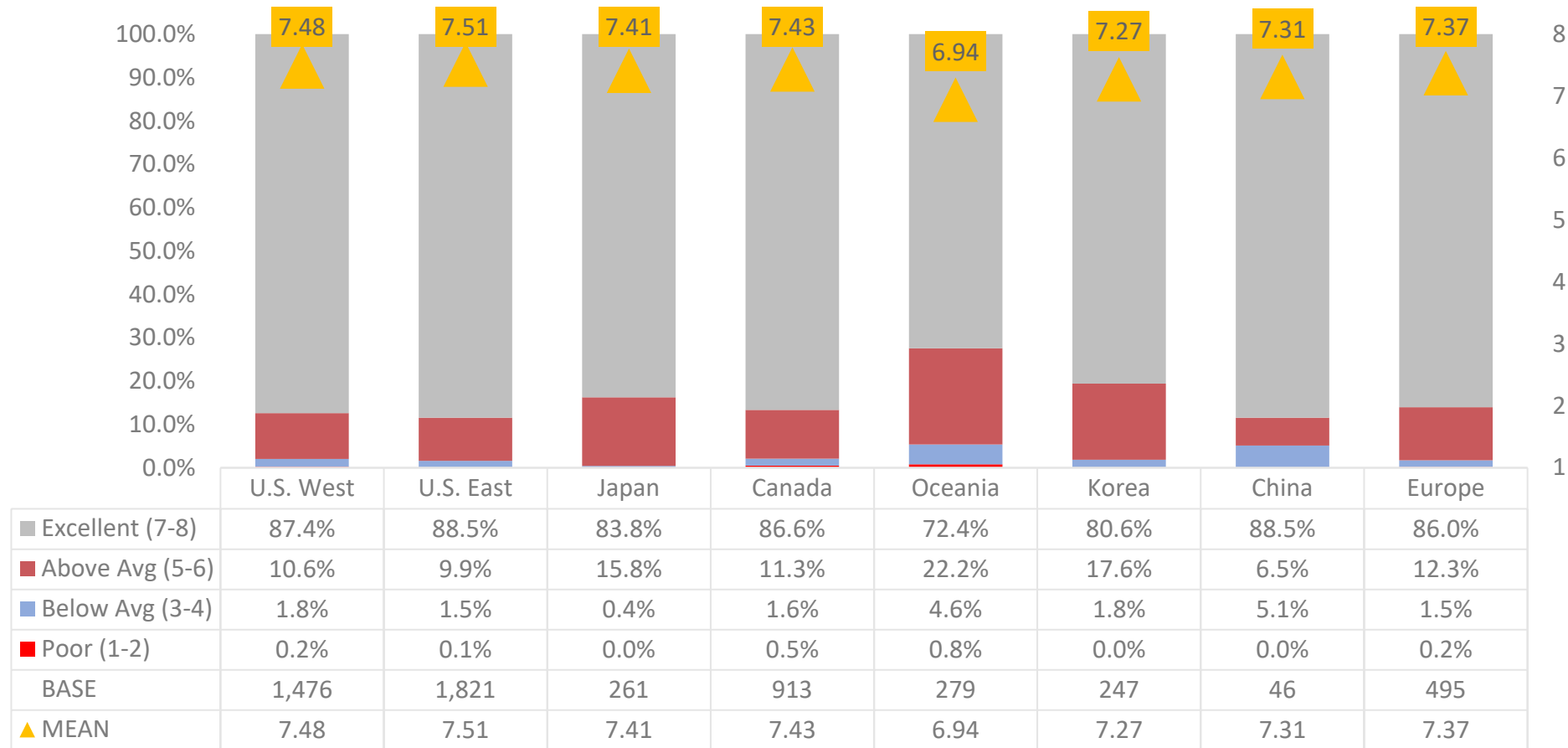
Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 1, 2024. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

Note: Some results are presented with very small sample sizes that produce statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

Section 1 – Visitor Satisfaction

Satisfaction - State of Hawai'i by Visitor Market

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



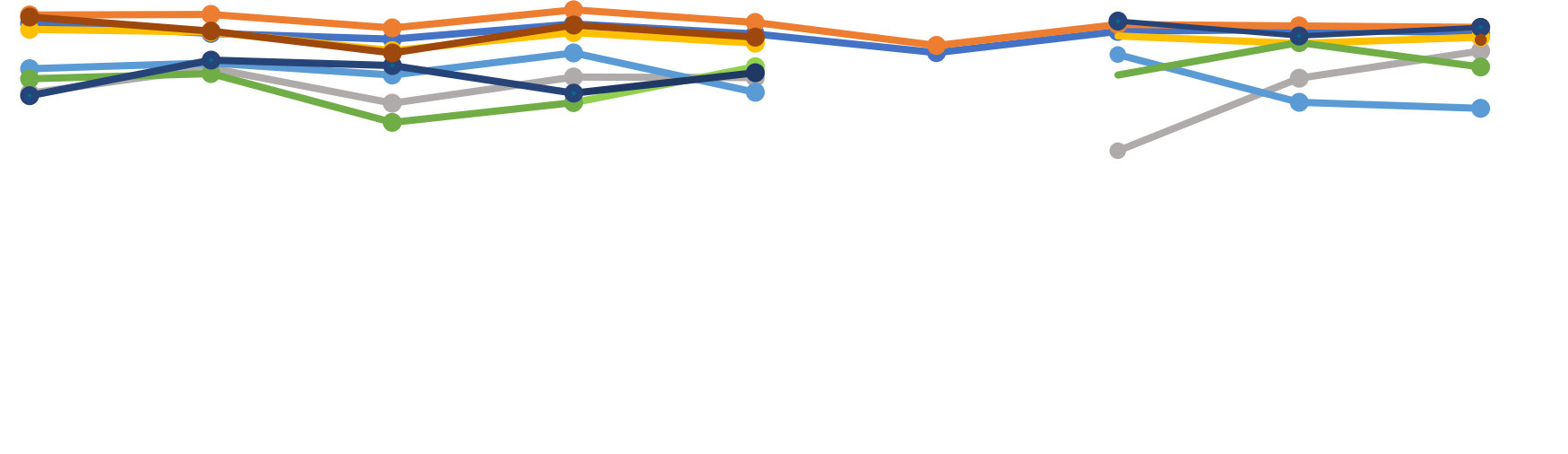
Satisfaction - State of Hawai'i by Visitor Market

- **Gender:** Female respondents from **U.S. West** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Age:** Visitors from **U.S. West** under the age of 50 gave higher satisfaction scores compared to older travelers. Satisfaction was also higher amongst younger travelers from **Japan** under the age of 35 compared to older respondents from this market.
- **Education:** Travelers from **U.S. West** and **Japan** without a college degree gave higher satisfaction scores for their trip than more educated segments from these travel markets.
- **Travel party size:** Visitors from **U.S. East** who were visiting the state in larger travel parties of two or more gave statistically higher satisfaction scores compared to those visitors from this market who were traveling alone.
- **Trips to Hawai'i:** First-time visitors from **Japan** gave statistically higher satisfaction scores compared to repeat visitors.

Satisfaction - State of Hawai'i by Visitor Market

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

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



| | Q1 2016 | Q1 2017 | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 89.3% | 87.3% | 86.2% | 89.2% | 87.2% | 83.5% | 87.7% | 88.1% | 87.4% |
| U.S. East | 91.0% | 91.1% | 88.4% | 92.0% | 89.5% | 84.9% | 89.1% | 88.8% | 88.5% |
| Japan | 75.4% | 80.4% | 73.4% | 78.6% | 78.5% | | 63.9% | 78.4% | 83.8% |
| Canada | 88.1% | 87.6% | 83.9% | 87.5% | 85.4% | | 86.8% | 85.3% | 86.6% |
| Oceania | 80.3% | 81.4% | 79.0% | 83.4% | 75.6% | | 83.1% | 73.6% | 72.4% |
| Korea | 78.3% | 79.3% | 69.6% | 73.5% | 80.7% | | 79.0% | 85.5% | 80.6% |
| China | 74.9% | 82.0% | 80.9% | 75.4% | 79.5% | | 89.8% | 86.8% | 88.5% |
| Europe | 90.6% | 87.8% | 83.4% | 89.0% | 86.6% | | | | 86.0% |

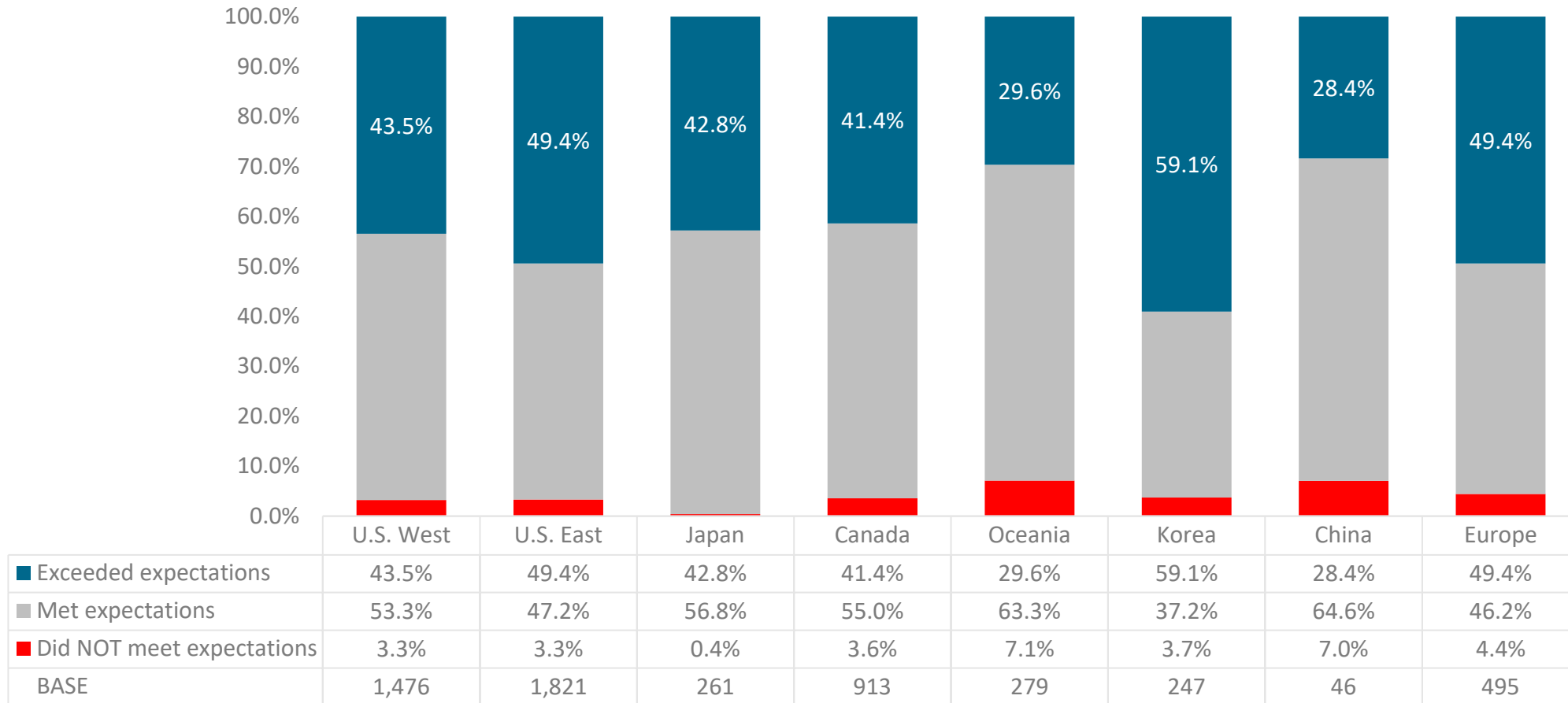
P= Preliminary Data

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

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



SATISFACTION - HAWAI'I TRIP EXPECTATIONS



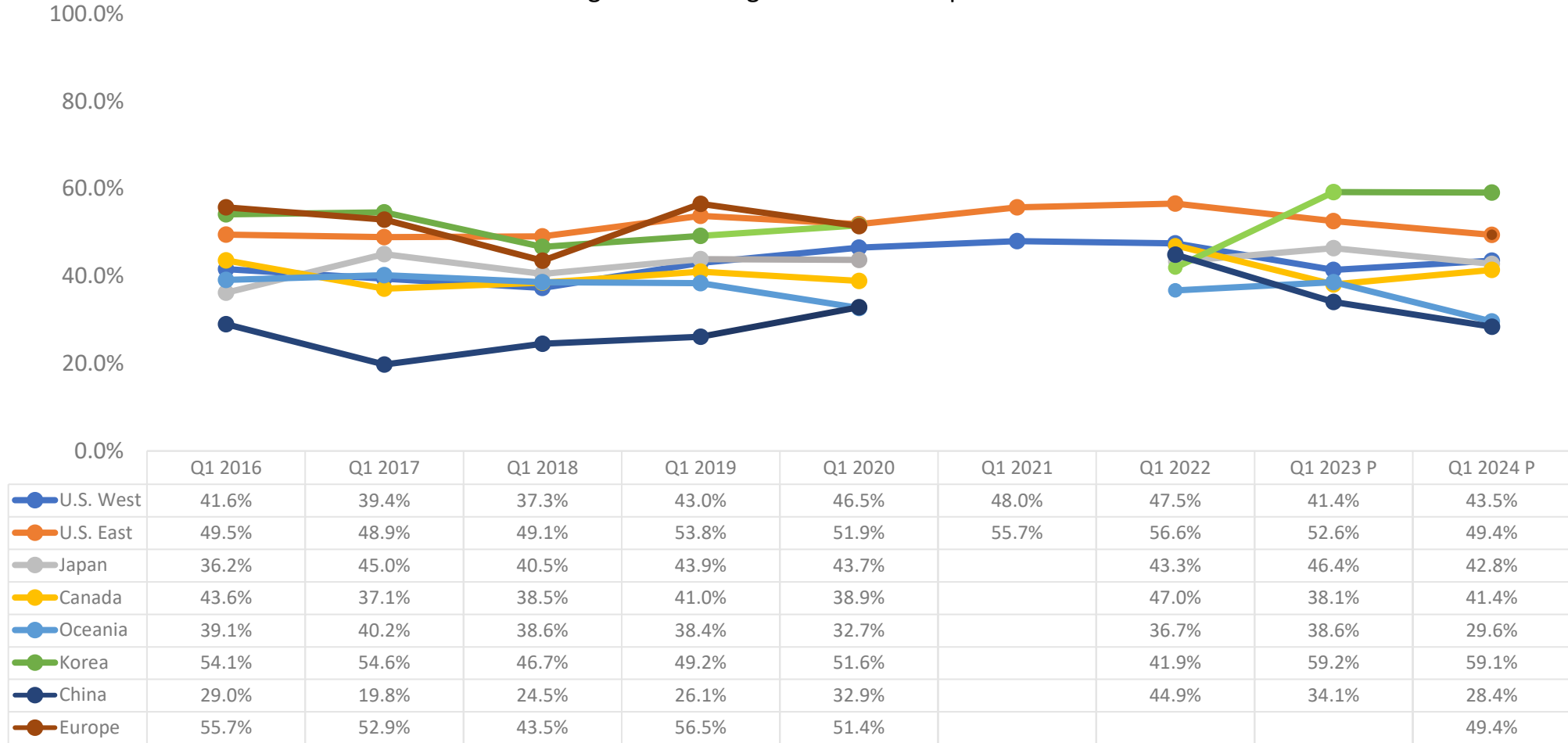
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- **Trips to Hawai'i:** First-time visitors from the following visitor markets gave higher mean scores than repeat visitors: **U.S. West, U.S. East, Canada and Japan.**
- **Age:** Younger respondents from **U.S. West** (between 18 – 49 years old) , **U.S. East** (between 18 – 49 years old), **Japan** (18 - 34 years old), and **Canada** (between 18 – 49 years old) were more likely to respond that their trip exceeded expectations compared to visitors from these markets in older age groups. Agreement with this sentiment tended to decline with age.
- **Gender:** Female visitors from **U.S. West** and **U.S. East** gave higher mean satisfaction scores compared to male visitors from these markets.
- **Travel party size:** Visitors from **U.S. East** who traveled in larger travel parties (2+ persons) gave higher satisfaction scores compared to those who traveled by themselves.
- **Islands visited:** Visitors from **U.S. West** whose trip was limited to a single island were statistically more likely to feel their trip exceeded their expectations.

SATISFACTION - HAWAI‘I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

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



P= Preliminary Data

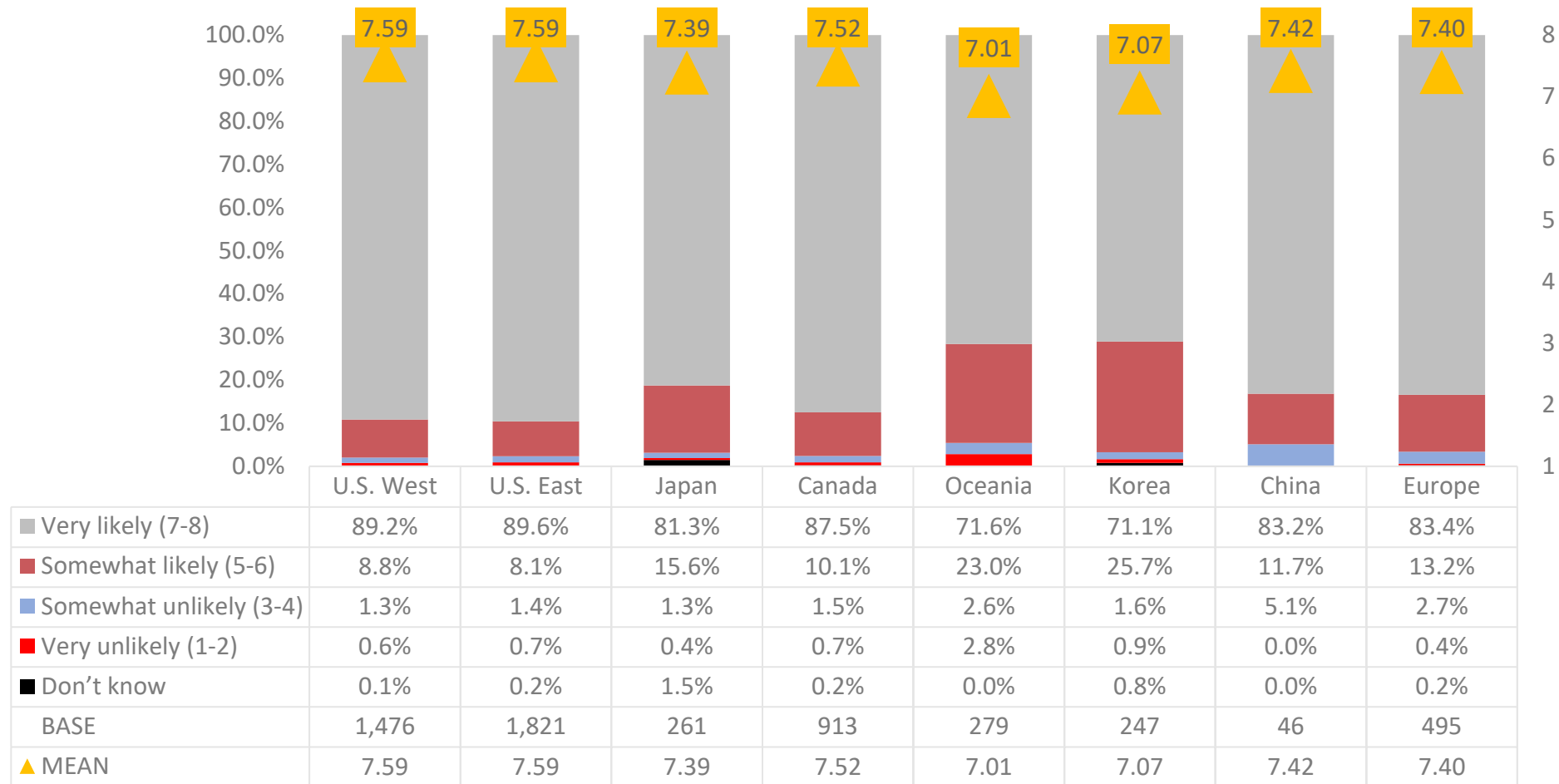
Q. Would you say this trip to Hawai‘i ___?

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



BRAND/ DESTINATION - ADVOCACY

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

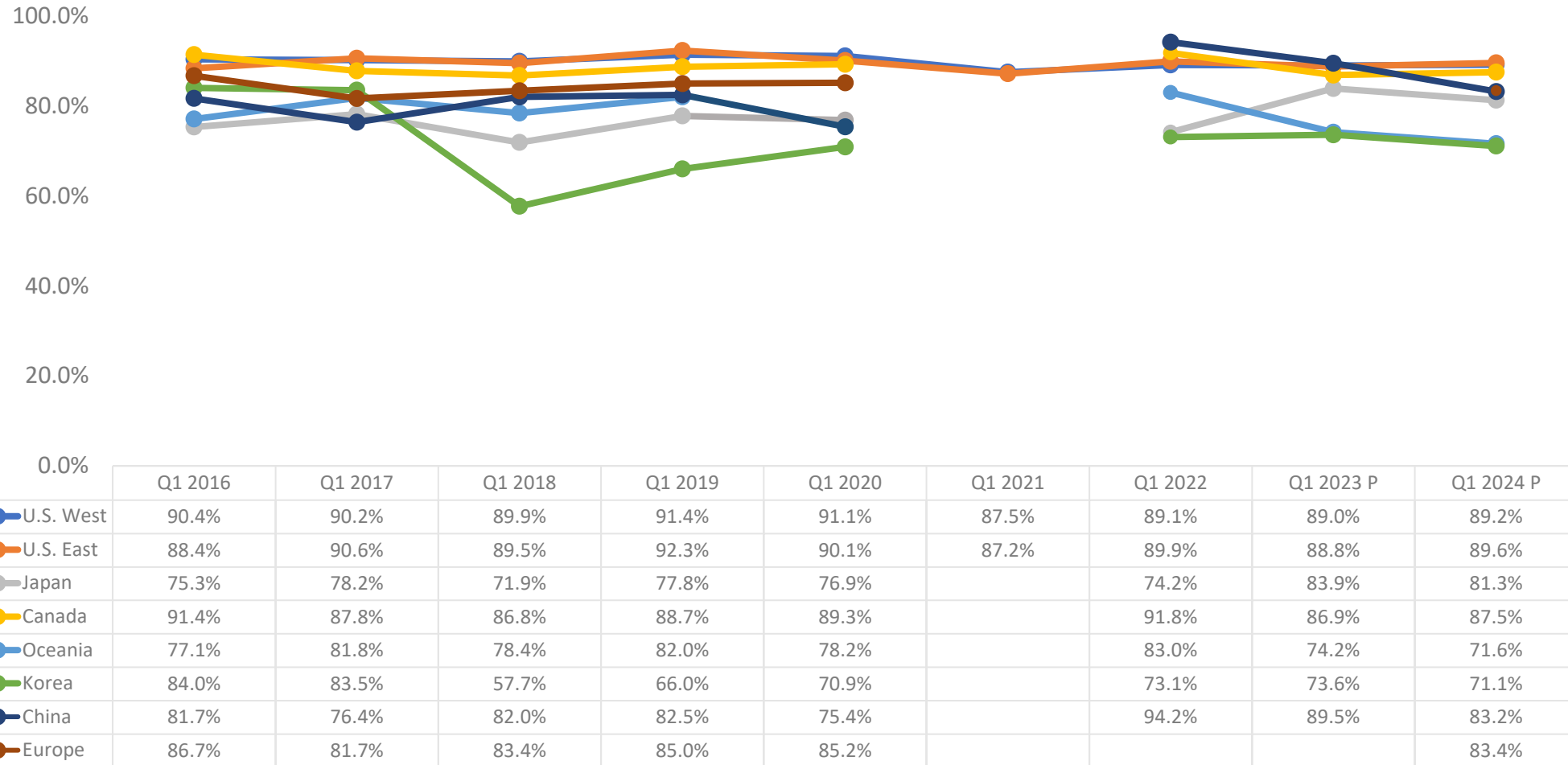


BRAND/ DESTINATION - ADVOCACY

- **Gender:** Females from **U.S. West, U.S. East** and **Japan** were more likely to recommend the state to others than males from these visitor markets.
- **Education:** Travelers from **Japan** without a college degree were more likely to recommend the state compared to college graduates.
- **Travel party size:** Visitors in travel parties of two or more from **U.S. East** were more likely to recommend the state to others compared to those traveling by themselves.
- **Islands visited:** Visitors from **U.S. West** whose trip was limited to a single island were statistically more likely to feel as though they would recommend the state to others.

BRAND/ DESTINATION - ADVOCACY

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



P= Preliminary Data

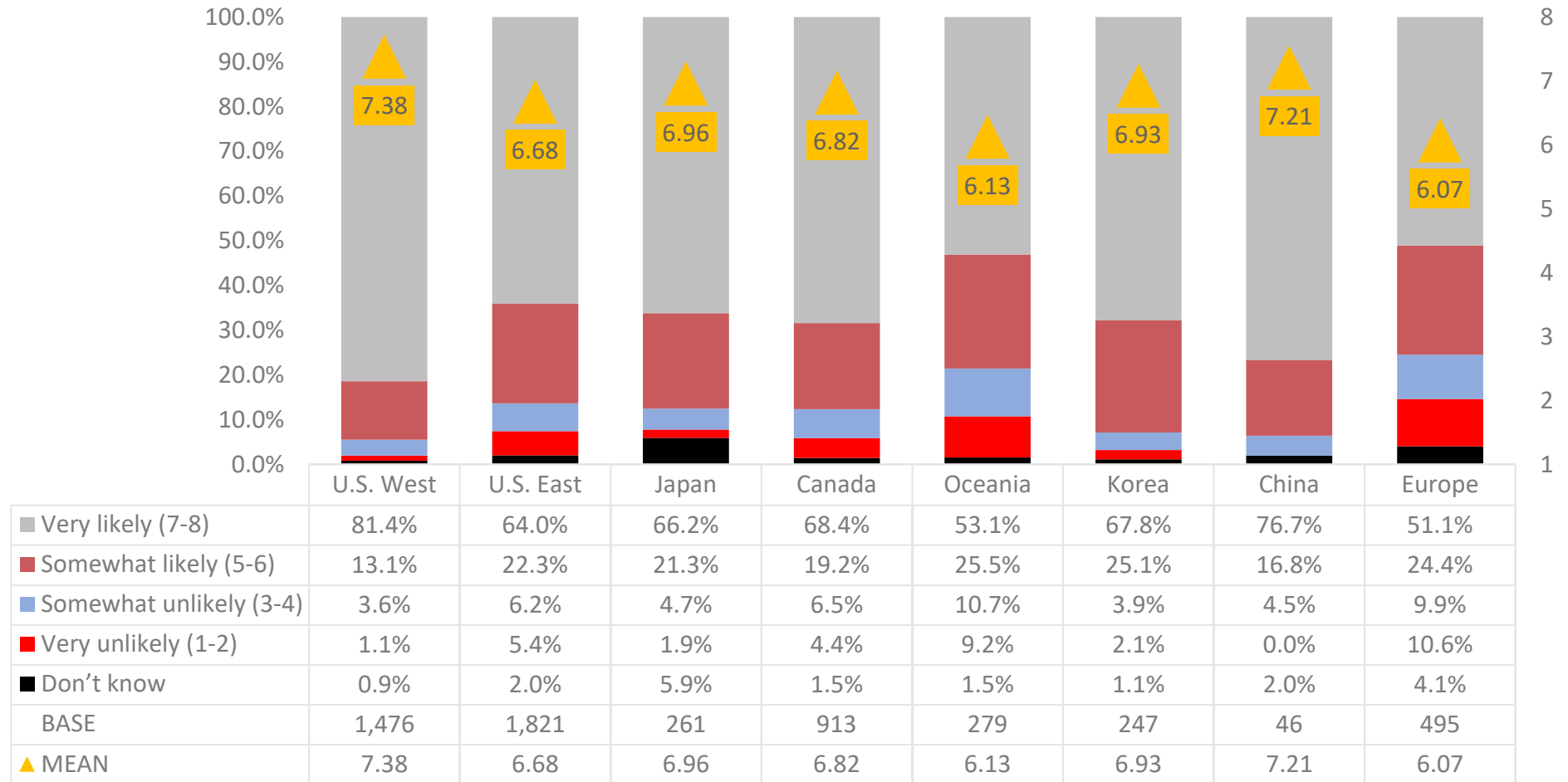
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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



LIKELIHOOD OF RETURN VISIT

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

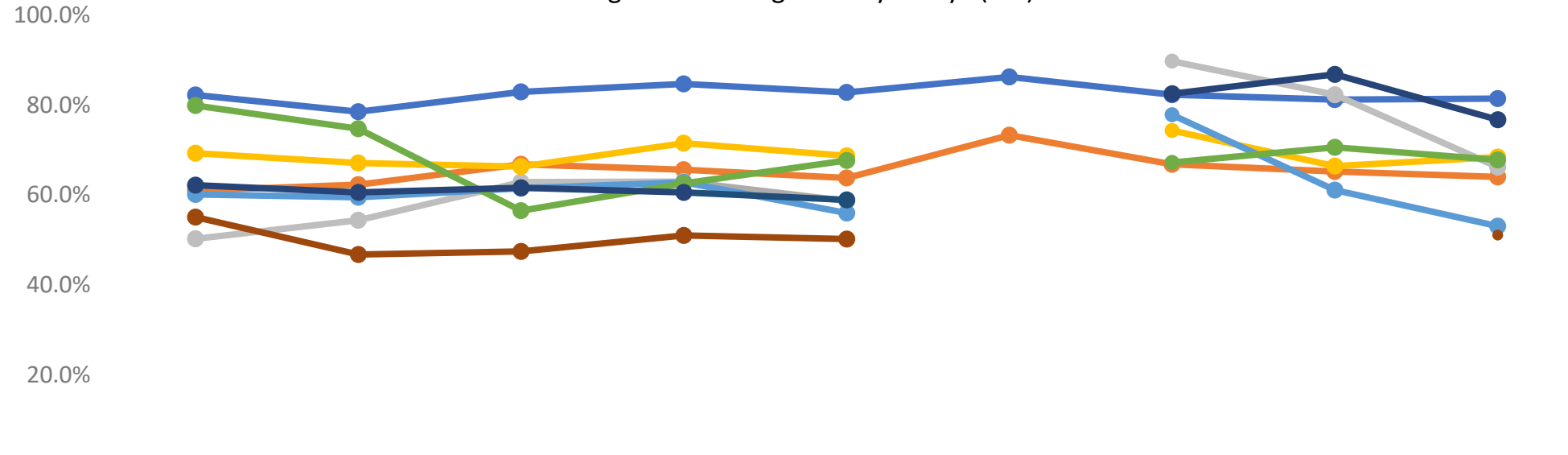


LIKELIHOOD OF RETURN VISIT

- **Gender:** Females from **U.S. West** were more likely to anticipate a possible return to the state than males.
- **Trips to Hawai'i:** Repeat visitors from the following visitor markets expressed a greater likelihood of returning to the state than first-time visitors: **U.S. West, U.S. East, Japan, and Canada.**
- **Islands visited:** Visitors from **U.S. East** whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than those who visited multiple islands during their stay.
- **Age:** Travelers from **U.S. West** between the ages 35-64 years old expressed a greater likelihood of returning than other age groups from this visitor market.
- **Travel party size:** Those from **U.S. West** who traveled to the state in travel parties of one or two persons expressed a higher likelihood of return.
- **Household income:** Visitors from **U.S. West** who reside in homes in the upper income tier (\$150K+) expressed a higher probability of returning to the state.
- **Education:** Travelers without a college degree from **U.S. West** and **Japan** expressed a stronger likelihood to return.

LIKELIHOOD OF RETURN VISIT

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



| | Q1 2016 | Q1 2017 | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 82.2% | 78.5% | 82.9% | 84.7% | 82.8% | 86.2% | 82.3% | 81.2% | 81.4% |
| U.S. East | 61.0% | 62.3% | 66.8% | 65.6% | 63.8% | 73.3% | 66.8% | 65.2% | 64.0% |
| Japan | 50.3% | 54.4% | 62.9% | 63.0% | 58.7% | | 89.7% | 82.3% | 66.2% |
| Canada | 69.3% | 67.1% | 66.3% | 71.5% | 68.7% | | 74.3% | 66.4% | 68.4% |
| Oceania | 60.1% | 59.5% | 61.5% | 62.8% | 56.0% | | 77.8% | 61.1% | 53.1% |
| Korea | 79.9% | 74.7% | 56.5% | 62.6% | 67.7% | | 67.2% | 70.6% | 67.8% |
| China | 62.2% | 60.6% | 61.6% | 60.6% | 58.9% | | 82.5% | 86.8% | 76.7% |
| Europe | 55.1% | 46.8% | 47.5% | 51.0% | 50.2% | | | | 51.1% |

P= Preliminary Data

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

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

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

| Q1 2023 P | Q1 2024 P |
|---|---|
| 45.6% Too expensive | 59.7% Too expensive |
| 34.2% Poor value | 33.0% Want to go someplace new |
| 25.3% Want to go someplace new | 30.6% Poor value |
| 22.7% Too crowded/ congested | 25.6% Too crowded/ congested |
| 17.7% Too commercialized/ overdeveloped | 19.5% Five years is too soon to revisit |
| 13.9% Five years is too soon to revisit | 17.1% No compelling reason to return |
| 13.9% No compelling reason to return | 16.9% Too commercialized/ overdeveloped |
| 11.4% Other financial obligations | 12.2% Flight too long |
| | 11.0% Poor service |

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

| Q1 2023 P | Q1 2024 P |
|---|---|
| 51.7% Too expensive | 55.6% Too expensive |
| 43.1% Flight too long | 44.8% Flight too long |
| 37.4% Want to go someplace new | 38.9% Want to go someplace new |
| 21.3% Poor value | 20.9% Poor value |
| 14.8% Five years is too soon to revisit | 19.3% Too crowded/ congested |
| 14.8% Too crowded/ congested | 14.4% Five years is too soon |
| 12.6% Too commercialized/ overdeveloped | 11.3% Too commercialized/ overdeveloped |
| 11.3% No compelling reason to return | |
| 10.0% Other financial obligations | |

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

| Q1 2023 P* | Q1 2024 P** |
|---|-----------------------------------|
| 48.4% Too expensive | 70.8% Too expensive |
| 38.3% Want to go someplace new | 39.3% Want to go someplace new |
| 26.6% Poor value | 36.6% Five years is too soon |
| 25.0% Five years is too soon | 20.9% Other financial obligations |
| 13.3% No compelling reason to return | |
| 13.3% Unfriendly people/ felt unwelcome | |
| 11.7% Flight too long | |
| 11.7% Crime/ safety concerns | |

*Caution small base (n=8 respondents) in Q1 2023.

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

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

| Q1 2023 P | Q1 2024 P |
|---|-----------------------------------|
| 63.2% Too expensive | 64.9% Too expensive |
| 35.3% Want to go someplace new | 37.4% Want to go someplace new |
| 34.7% Poor value | 36.0% Flight too long |
| 33.5% Flight too long | 22.0% Five years is too soon |
| 13.8% Too commercialized/ overdeveloped | 20.7% Poor value |
| 12.6% Too crowded/ congested | 12.4% Other financial obligations |
| 10.3% Five years is too soon to revisit | 10.7% Too crowded/ congested |

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

| Q1 2023 P | Q1 2024 P |
|---|---|
| 62.0% Too expensive | 52.5% Too expensive |
| 51.6% Poor value | 40.5% Want to go someplace new |
| 33.8% Want to go someplace new | 30.0% Poor value |
| 28.5% Too crowded/ congested | 25.0% Too commercialized/ overdeveloped |
| 23.7% Too commercialized/ overdeveloped | 17.8% No compelling reason to return |
| 19.0% Five years is too soon to revisit | 17.0% Flight too long |
| 13.7% No compelling reason to return | 15.0% Five years is too soon |
| | 15.0% Too crowded/ congested |

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

| Q1 2023 P* | Q1 2024 P** |
|---|--------------------------------------|
| 65.5% Too expensive | 58.2% Too expensive |
| 41.5% Poor value | 31.7% No compelling reason to return |
| 24.2% Too crowded/ congested | 28.0% Poor value |
| 17.3% Too commercialized/ overdeveloped | 22.8% Flight too long |
| 17.2% Five years is too soon to revisit | 21.2% Want to go someplace new |
| 13.8% No compelling reason to return | 12.2% Five years is too soon |
| 13.8% Flight is too long | 10.6% Dirty/ filthy |
| 13.7% Want to go someplace new | |
| 10.4% Unfriendly people/ felt unwelcome | |
| 10.4% Poor service | |

*Caution small base (n=24 respondents) in Q1 2023.

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

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

| Q1 2023* | Q1 2024 P** |
|---------------------------------------|--------------------------------------|
| 100% Too expensive | 100% Too crowded/ congested |
| 100% Flight too long | 69.7% No compelling reason to return |
| 100% Too crowded/ congested/ traffic | 69.7% Too expensive |
| 100% No reason to return/ nothing new | 69.7% Poor value |
| | 60.6% Flight too long |
| | 30.3% Five years is too soon |
| | 30.3% Want to go someplace new |

*Caution small base (n=1 respondent) in Q1 2023.

**Caution small base (n=3 respondents) in Q1 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

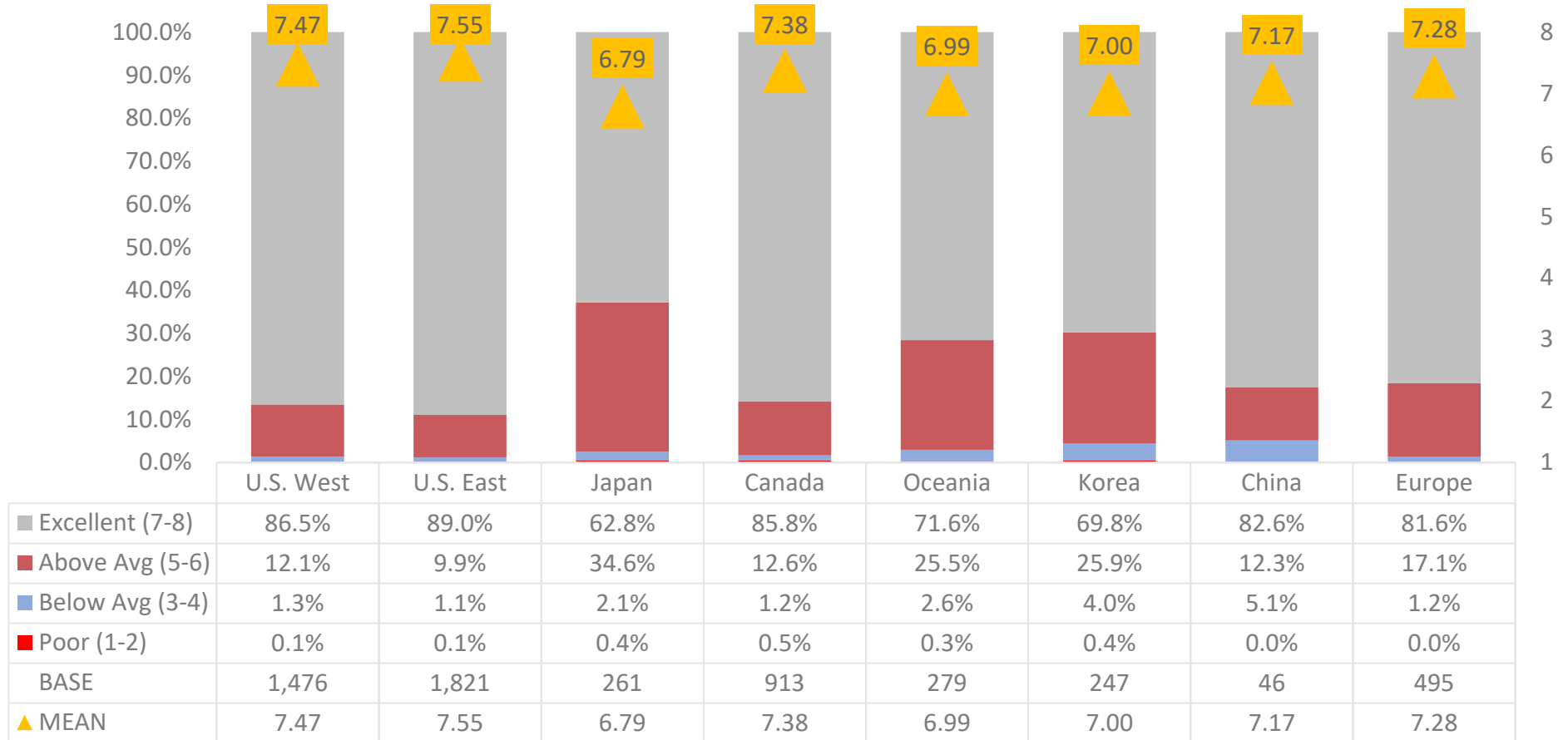
| Q1 2020* | Q1 2024 P |
|-----------------------------------|---|
| 58.0% Flight too long | 58.5% Flight too long |
| 41.8% Too expensive | 57.6% Too expensive |
| 30.0% Want to go someplace new | 32.3% Want to go someplace new |
| 16.0% Other financial obligations | 17.8% Poor value |
| 14.0% Poor value | 16.8% Five years is too soon |
| 13.3% Five years is too soon | 12.1% Too commercialized/ overdeveloped |
| | 10.7% No compelling reason to return |

*No data collected from 2021 thru 2023.

P= Preliminary Data

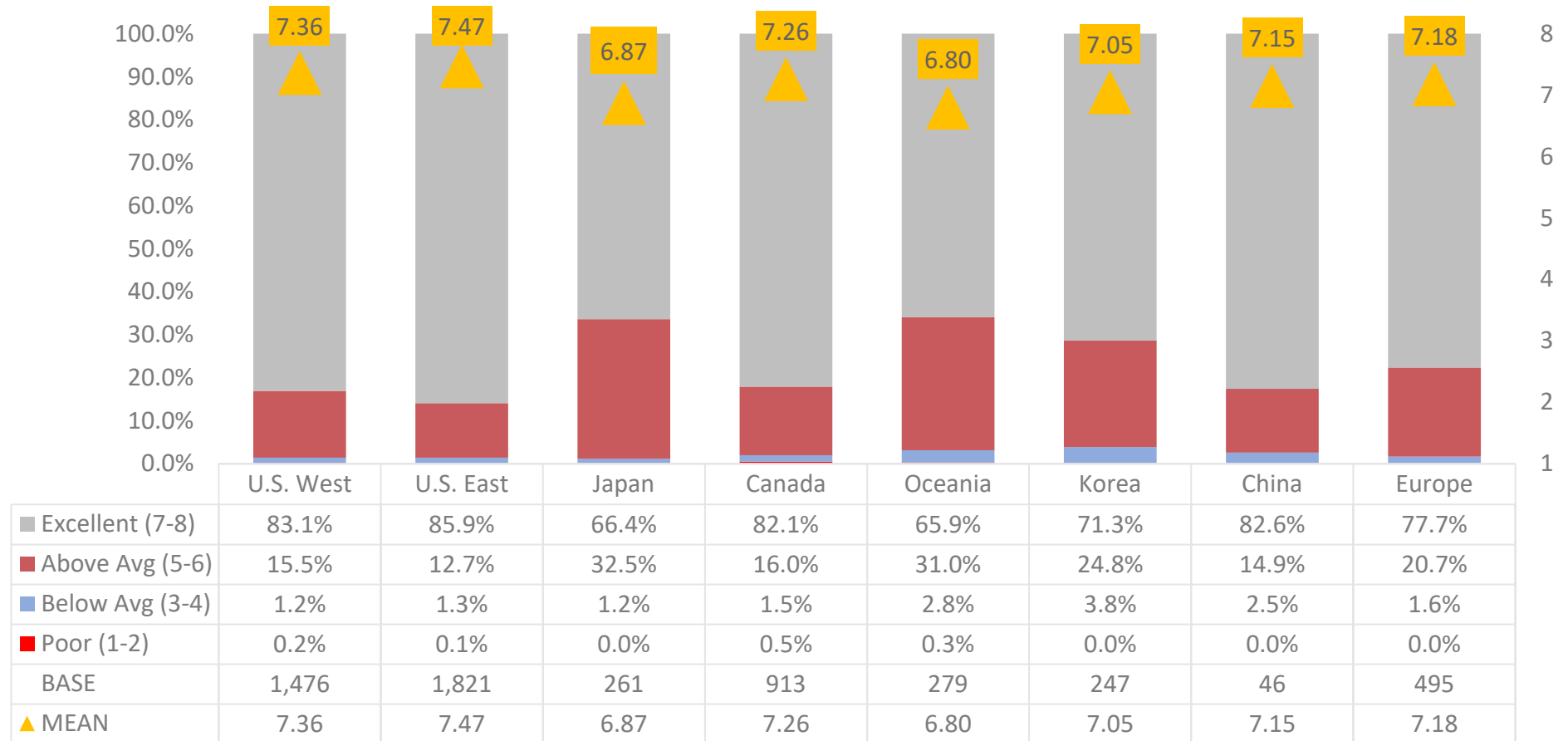
OFFERING A VARIETY OF EXPERIENCES

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



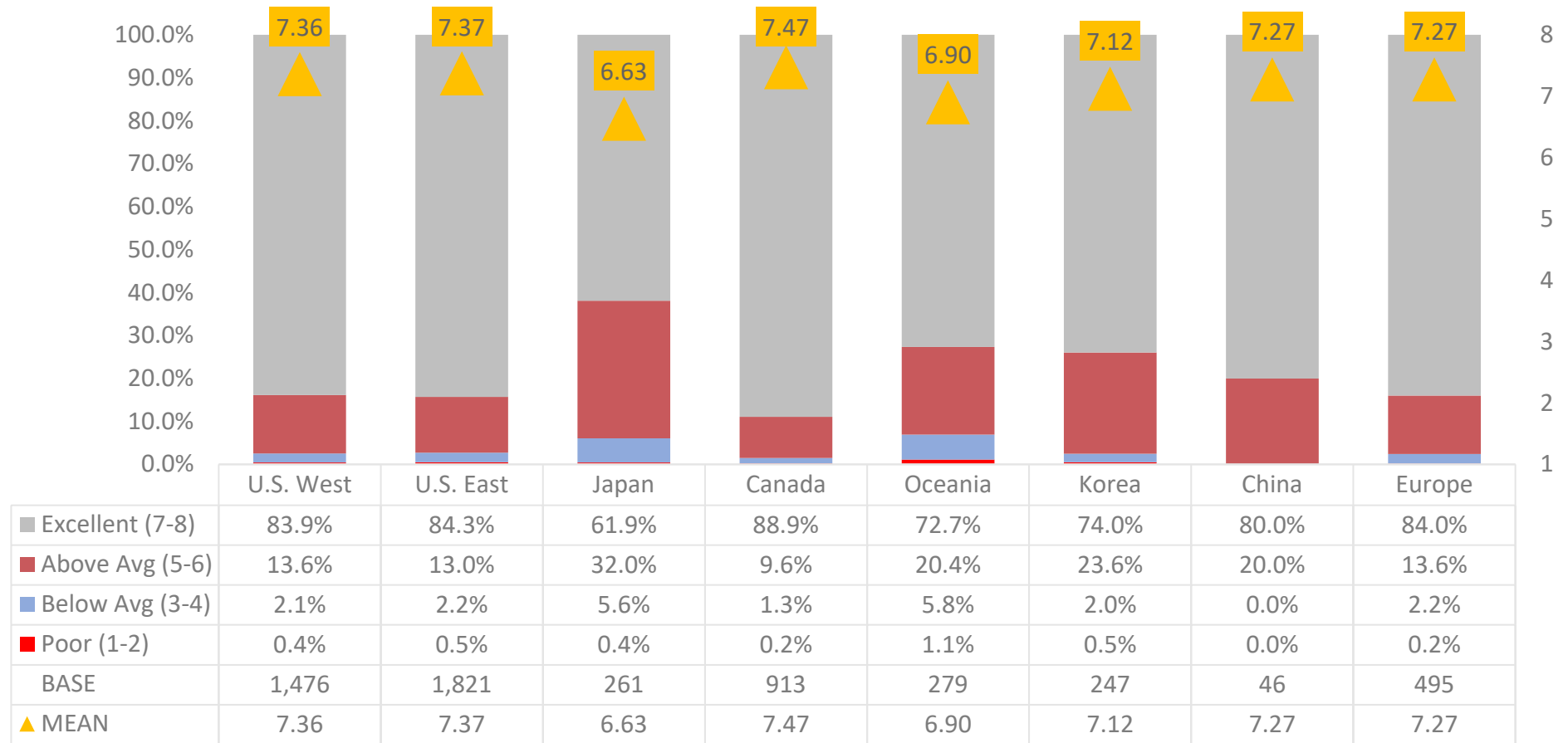
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



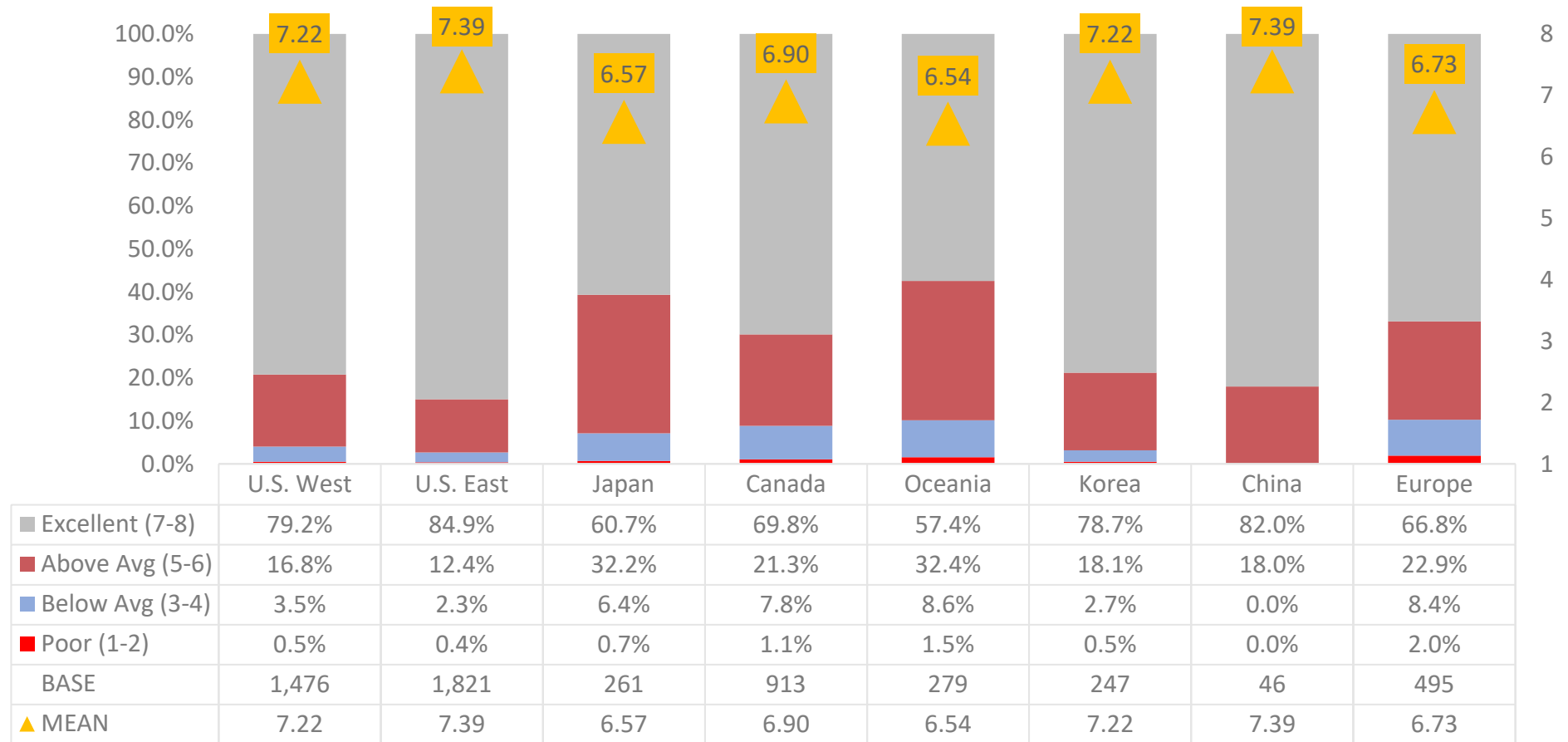
SAFE AND SECURE DESTINATION

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



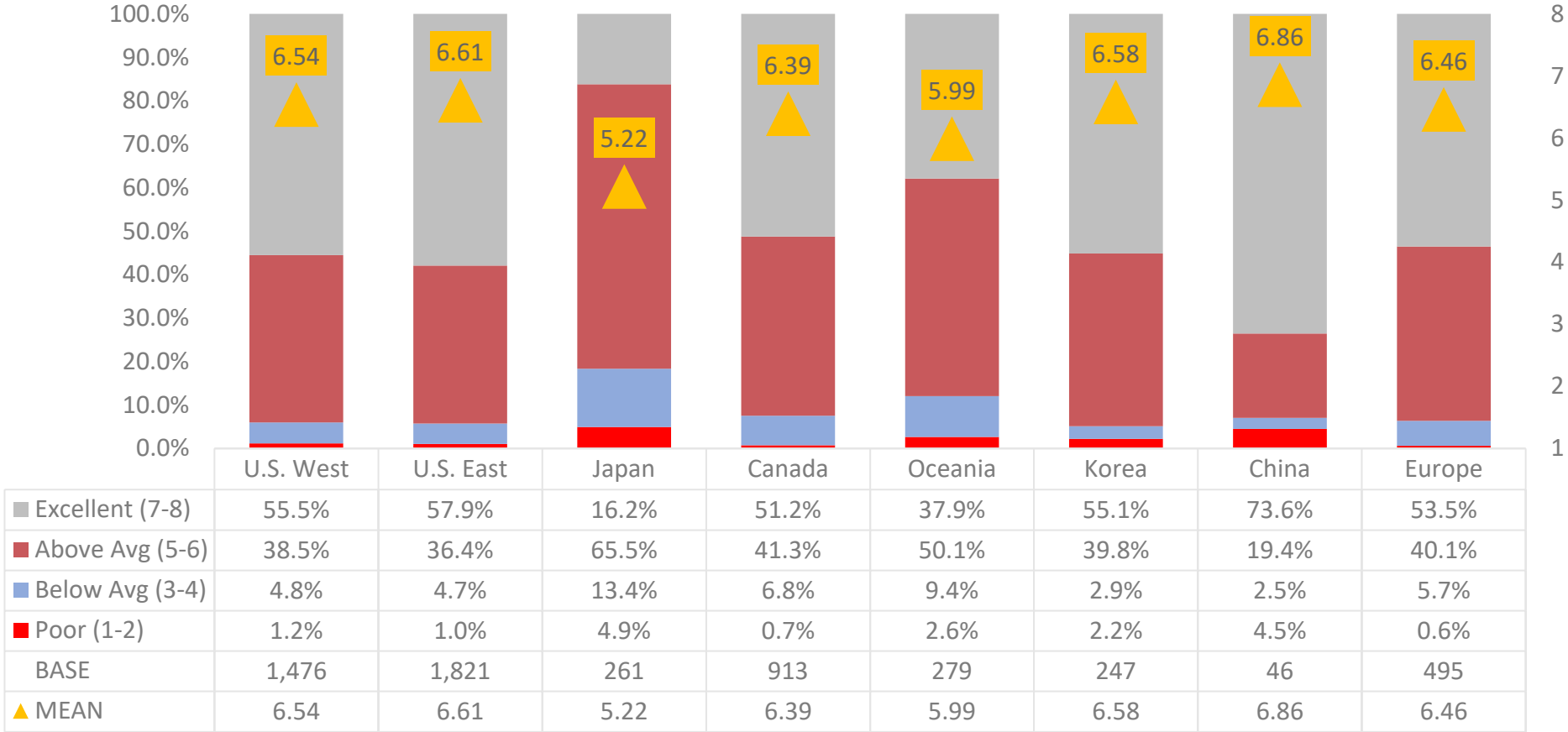
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Section 2 – Activities

ACTIVITIES - SIGHTSEEING

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 96.7% | 98.7% | 96.9% | 98.1% | 93.6% | 99.5% | 97.3% | 98.0% |
| On own (self-guided)/ driving around island | 84.0% | 81.8% | 71.9% | 84.4% | 56.7% | 84.9% | 72.3% | 76.5% |
| Helicopter ride/ airplane tour | 3.5% | 6.0% | 0.6% | 4.3% | 4.5% | 4.3% | 2.7% | 10.6% |
| Boat tour/ submarine ride/ whale watching | 26.8% | 35.5% | 9.4% | 27.1% | 13.7% | 32.6% | 43.2% | 30.4% |
| Visit towns/ communities | 53.9% | 54.8% | 36.3% | 59.0% | 32.9% | 38.3% | 23.6% | 44.0% |
| Private limousine/ van tour/ tour bus | 7.0% | 12.8% | 13.0% | 8.0% | 28.5% | 10.7% | 8.2% | 13.0% |
| Scenic views/ natural landmarks | 59.5% | 67.8% | 21.3% | 67.7% | 47.8% | 63.9% | 70.5% | 63.0% |
| Movie/ TV/ film location tours | 3.7% | 6.1% | 6.6% | 5.1% | 7.6% | 21.4% | 6.8% | 8.4% |

ACTIVITIES - RECREATION

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 96.2% | 96.2% | 92.8% | 98.4% | 91.3% | 98.9% | 95.9% | 96.2% |
| Beach/ sunbathing | 83.6% | 82.3% | 74.8% | 87.1% | 76.0% | 84.6% | 83.0% | 81.9% |
| Bodyboarding | 10.7% | 6.8% | 0.9% | 14.1% | 2.2% | 3.1% | 0.0% | 4.0% |
| Standup paddle boarding | 5.2% | 3.7% | 0.6% | 4.1% | 4.0% | 3.5% | 6.8% | 3.7% |
| Surfing | 6.2% | 5.5% | 2.5% | 9.4% | 7.4% | 13.7% | 5.3% | 11.1% |
| Canoe paddling | 1.3% | 1.1% | 0.4% | 1.5% | 1.3% | 2.9% | 2.0% | 1.9% |
| Kayaking | 3.9% | 4.3% | 0.4% | 3.0% | 1.5% | 3.1% | 4.7% | 4.4% |
| Swimming in the ocean | 59.2% | 56.7% | 33.4% | 66.4% | 56.7% | 56.0% | 41.2% | 60.9% |
| Snorkeling | 39.0% | 35.1% | 7.6% | 42.6% | 19.7% | 49.6% | 27.0% | 38.5% |
| Freediving | 1.0% | 0.8% | 0.4% | 1.4% | 0.8% | 0.4% | 4.1% | 0.8% |
| Windsurfing/ Kitesurfing | 0.1% | 0.2% | 0.0% | 0.3% | 0.3% | 0.4% | 0.0% | 0.5% |
| Jet skiing/ Parasailing | 0.8% | 1.1% | 1.8% | 0.8% | 0.5% | 2.1% | 0.0% | 0.4% |
| Scuba diving | 2.5% | 1.7% | 0.6% | 2.1% | 0.3% | 0.9% | 5.3% | 2.7% |
| Fishing | 2.8% | 2.7% | 0.0% | 2.5% | 0.0% | 1.4% | 2.0% | 0.9% |
| Golf | 7.8% | 7.2% | 3.0% | 9.7% | 2.6% | 7.8% | 2.7% | 3.7% |
| Running/ jogging/ fitness/ walking | 33.3% | 31.3% | 22.3% | 36.6% | 27.1% | 17.1% | 23.0% | 20.0% |

ACTIVITIES - RECREATION (continued)

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 96.2% | 96.2% | 92.8% | 98.4% | 91.3% | 98.9% | 95.9% | 96.2% |
| Cycling | 2.5% | 2.2% | 2.2% | 5.1% | 1.8% | 1.1% | 5.3% | 3.7% |
| Spa | 6.6% | 8.9% | 2.8% | 5.8% | 9.7% | 7.4% | 0.0% | 4.6% |
| Hiking | 41.9% | 47.9% | 21.0% | 47.9% | 21.5% | 27.0% | 39.1% | 45.5% |
| Backpacking/ camping | 1.1% | 1.4% | 0.0% | 2.3% | 0.0% | 1.6% | 6.1% | 3.0% |
| Agritourism | 12.5% | 13.3% | 6.1% | 10.2% | 3.0% | 20.0% | 8.2% | 7.2% |
| Sports event or tournament | 1.8% | 1.9% | 1.3% | 1.6% | 1.6% | 1.7% | 2.7% | 1.7% |
| Parks/ botanical gardens | 35.6% | 42.2% | 25.8% | 38.5% | 30.5% | 26.2% | 28.5% | 37.9% |
| Waterparks | 1.5% | 1.2% | 1.1% | 1.4% | 1.0% | 2.9% | 2.0% | 0.7% |
| Mountain tubing/ waterfall rappel | 2.0% | 1.5% | 0.3% | 2.3% | 0.6% | 0.4% | 6.8% | 2.7% |
| Zip-lining | 3.5% | 3.3% | 0.0% | 2.3% | 1.0% | 0.8% | 2.0% | 1.9% |
| Skydiving | 0.4% | 0.6% | 1.5% | 0.3% | 0.0% | 0.5% | 2.0% | 0.6% |
| All-terrain vehicle (ATV) | 2.0% | 4.2% | 0.3% | 2.4% | 4.8% | 9.6% | 0.0% | 1.6% |
| Horseback riding | 0.7% | 1.8% | 2.0% | 0.7% | 0.3% | 0.5% | 0.0% | 1.0% |

ACTIVITIES - ENTERTAINMENT & DINING

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 98.5% | 97.9% | 98.5% | 98.1% | 99.0% | 98.4% | 93.2% | 97.4% |
| Lunch/ sunset/ dinner/ evening cruise | 20.0% | 24.7% | 13.3% | 21.9% | 14.7% | 37.8% | 51.2% | 26.9% |
| Live music/ stage show | 29.0% | 30.3% | 17.5% | 28.8% | 17.4% | 17.2% | 13.5% | 26.2% |
| Nightclub/ dancing/ bar/ karaoke | 7.0% | 6.7% | 2.9% | 6.6% | 9.1% | 3.4% | 2.0% | 6.9% |
| Fine dining | 47.0% | 45.5% | 39.4% | 39.7% | 28.5% | 49.8% | 35.9% | 28.5% |
| Family restaurant | 62.3% | 60.8% | 29.6% | 64.7% | 69.0% | 47.5% | 16.8% | 41.8% |
| Fast food | 29.9% | 31.1% | 57.0% | 40.9% | 54.3% | 62.4% | 49.4% | 43.6% |
| Food truck | 43.9% | 42.3% | 20.7% | 43.5% | 35.3% | 59.2% | 27.7% | 40.0% |
| Café/ coffee house | 52.3% | 50.0% | 57.7% | 58.0% | 66.1% | 65.1% | 44.5% | 57.5% |
| Ethnic dining | 26.0% | 28.8% | 5.3% | 18.6% | 17.6% | 25.7% | 23.8% | 13.1% |
| Farm-to-table cuisine | 18.7% | 20.8% | 14.1% | 11.4% | 3.9% | 3.7% | 6.8% | 8.8% |
| Prepared own meal | 47.9% | 39.3% | 23.5% | 59.3% | 23.6% | 18.9% | 13.5% | 42.3% |

ACTIVITIES - SHOPPING

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 95.9% | 95.3% | 97.6% | 97.8% | 93.0% | 97.1% | 95.9% | 96.3% |
| Malls/ department stores | 41.9% | 39.6% | 84.7% | 53.6% | 68.4% | 78.0% | 65.6% | 54.1% |
| Designer boutiques | 16.3% | 18.3% | 18.0% | 16.1% | 14.5% | 3.7% | 10.0% | 12.2% |
| Hotel/ resort stores | 32.7% | 37.6% | 30.9% | 33.5% | 36.4% | 32.8% | 19.5% | 23.8% |
| Swap meet/ flea market | 16.2% | 14.1% | 3.2% | 12.0% | 7.7% | 3.1% | 0.0% | 6.3% |
| Discount/ outlet stores | 12.1% | 12.2% | 23.0% | 13.1% | 28.1% | 62.2% | 7.4% | 16.7% |
| Supermarkets | 60.0% | 52.3% | 56.4% | 67.4% | 41.7% | 49.0% | 52.7% | 62.8% |
| Farmer's market | 36.5% | 33.4% | 13.4% | 43.0% | 18.8% | 10.3% | 16.8% | 33.6% |
| Convenience stores | 49.7% | 47.8% | 53.7% | 55.0% | 67.3% | 57.3% | 56.1% | 38.9% |
| Duty free stores | 4.2% | 5.0% | 27.8% | 6.4% | 13.3% | 40.6% | 17.0% | 7.2% |
| Hawai'i-made products | 45.5% | 49.4% | 17.1% | 46.5% | 31.0% | 29.7% | 34.4% | 43.0% |
| Local shops and artisans | 54.7% | 59.7% | 9.0% | 57.8% | 37.0% | 16.2% | 24.8% | 45.4% |
| Local fashion designers | 7.4% | 6.8% | 3.3% | 8.8% | 6.1% | 0.4% | 5.3% | 11.1% |

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 66.4% | 74.7% | 53.0% | 74.7% | 72.4% | 68.9% | 71.7% | 72.1% |
| Historic military sites and museums | 18.2% | 28.9% | 10.6% | 19.3% | 43.8% | 23.7% | 32.8% | 32.5% |
| Historic Hawaiian sites and museums | 31.4% | 36.8% | 13.0% | 36.3% | 26.8% | 11.0% | 35.7% | 33.3% |
| Other historical sites, museums, and homes | 14.7% | 16.8% | 7.6% | 14.2% | 9.8% | 20.7% | 18.2% | 15.5% |
| Art museums | 3.7% | 3.2% | 2.4% | 2.6% | 4.0% | 5.4% | 6.8% | 3.8% |
| Art galleries and exhibitions | 8.9% | 9.8% | 1.6% | 10.7% | 10.1% | 1.6% | 0.0% | 8.2% |
| Lū'au/ Polynesian show/ hula show | 22.6% | 34.3% | 15.1% | 26.6% | 22.1% | 20.6% | 10.9% | 24.2% |
| Lesson- ex. ukulele, hula, canoe, lei making | 4.9% | 7.0% | 10.1% | 5.0% | 4.1% | 6.4% | 0.0% | 5.6% |
| Play/ concert/ theatre | 3.0% | 2.7% | 2.5% | 4.3% | 1.5% | 3.9% | 2.0% | 4.3% |
| Art/ craft fair | 12.4% | 9.9% | 3.2% | 13.2% | 5.1% | 4.2% | 2.0% | 5.2% |
| Festival /event | 5.1% | 4.0% | 3.1% | 3.7% | 5.8% | 6.5% | 0.0% | 2.4% |

ACTIVITIES - TRANSPORTATION

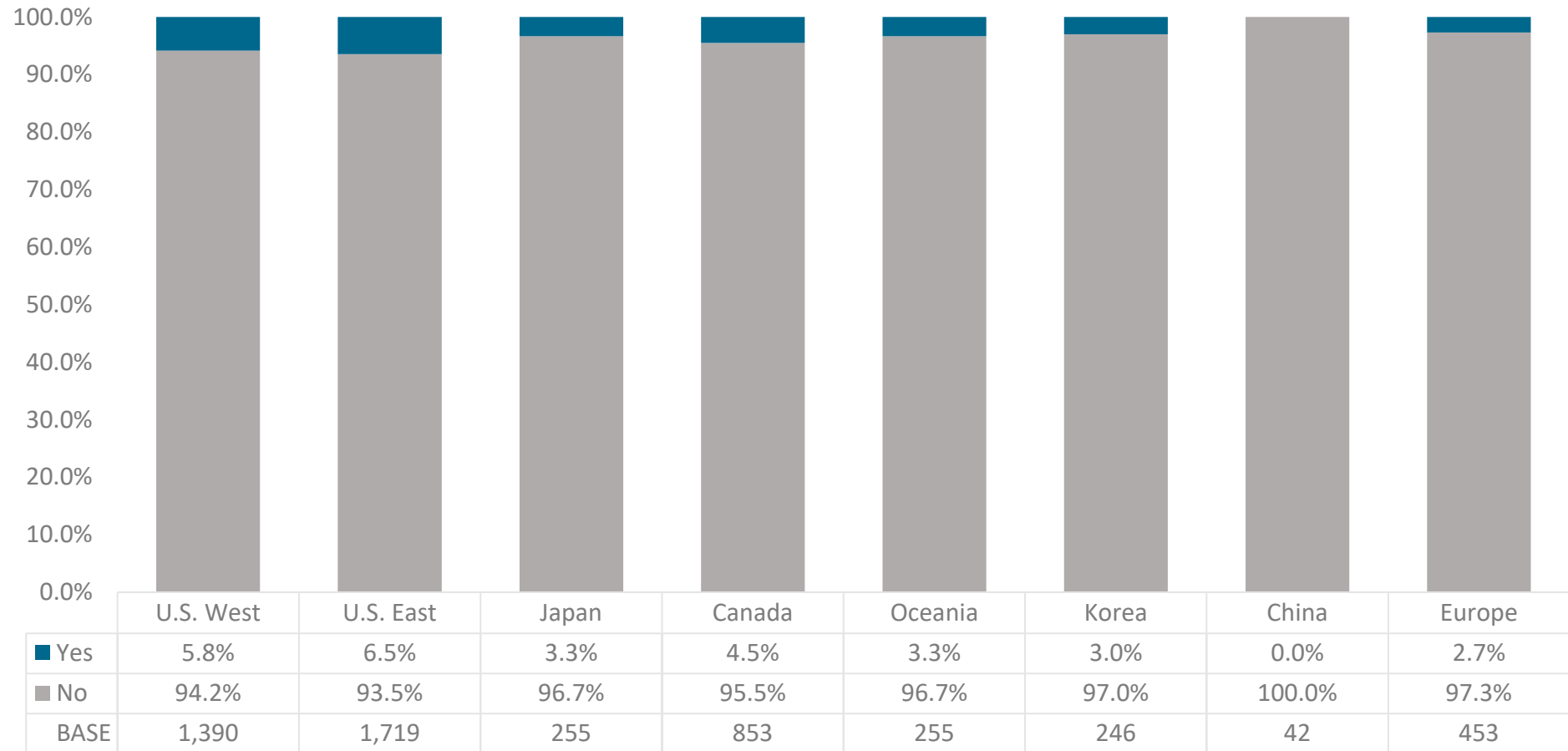
| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|------------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 92.0% | 91.2% | 96.6% | 94.7% | 97.9% | 97.5% | 93.2% | 91.7% |
| Airport shuttle | 11.6% | 15.6% | 24.1% | 16.2% | 26.7% | 10.0% | 8.8% | 15.3% |
| Trolley | 1.8% | 2.4% | 46.1% | 2.5% | 11.4% | 20.3% | 4.7% | 4.2% |
| Public bus | 5.3% | 4.7% | 26.7% | 9.3% | 18.0% | 11.9% | 15.6% | 18.7% |
| Tour bus/ tour van | 6.7% | 13.1% | 15.6% | 9.6% | 20.9% | 24.8% | 15.0% | 12.8% |
| Taxi/ limo | 7.2% | 9.2% | 27.3% | 10.3% | 31.8% | 22.6% | 17.6% | 17.2% |
| Rental car | 71.1% | 68.3% | 24.9% | 73.6% | 35.3% | 57.3% | 51.2% | 61.7% |
| Ride share | 19.4% | 20.4% | 26.3% | 19.0% | 47.2% | 23.4% | 30.5% | 23.2% |
| Car share (i.e., Hui, Turo) | 4.6% | 4.3% | 1.3% | 5.9% | 4.6% | 3.4% | 0.0% | 3.3% |
| Bicycle rental | 1.7% | 2.2% | 2.7% | 2.6% | 1.5% | 1.5% | 2.7% | 2.4% |

ACTIVITIES - OTHER

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| TOTAL | 35.2% | 31.0% | 14.4% | 24.6% | 11.8% | 25.9% | 17.4% | 25.6% |
| Visit friends/ family | 33.4% | 29.3% | 13.6% | 22.0% | 10.8% | 25.9% | 17.4% | 21.1% |
| Volunteering/ Giving back to the local community | 3.4% | 2.6% | 1.2% | 3.0% | 1.3% | 0.4% | 2.7% | 4.7% |

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

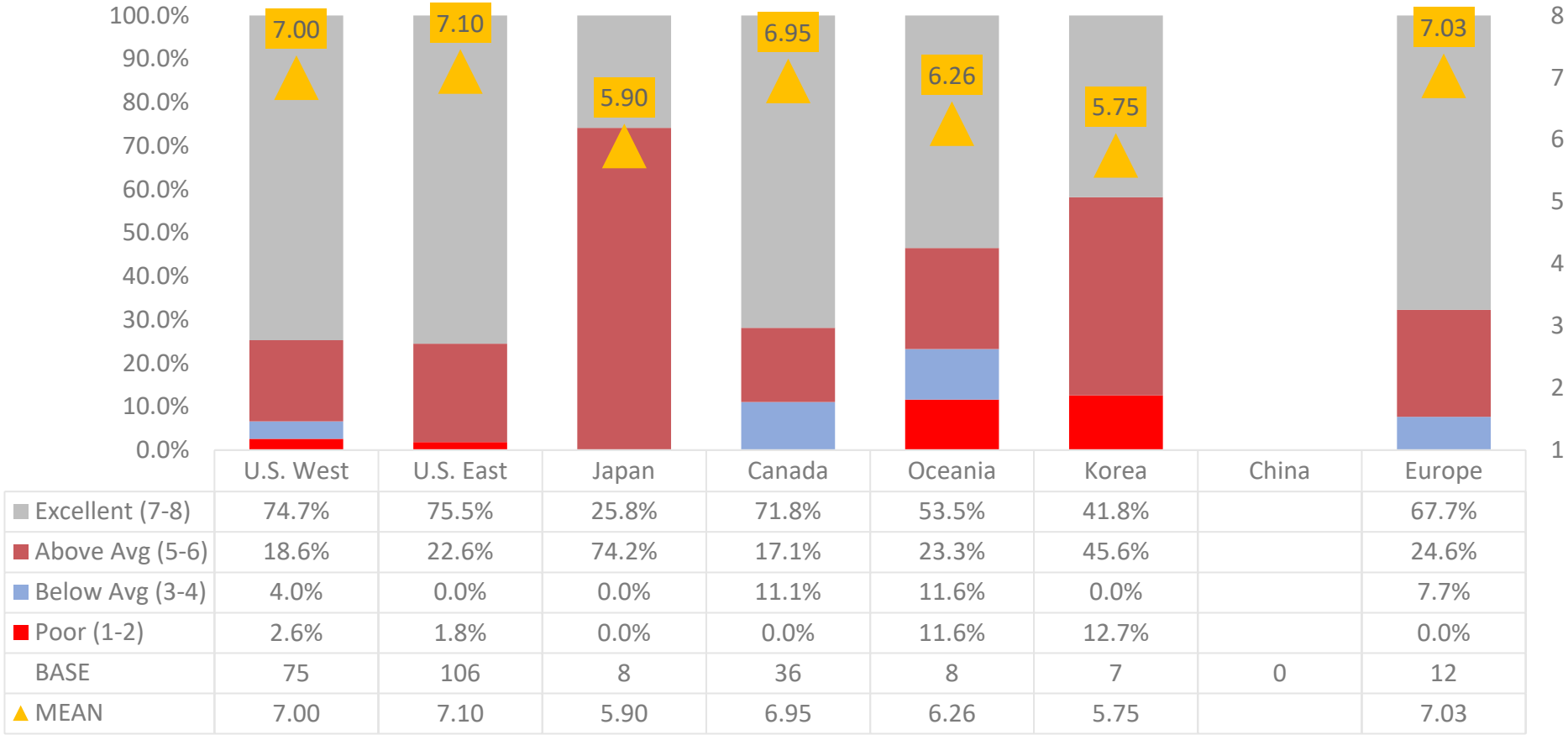


DISABLED TRAVELER - REQUIRED ASSISTANCE

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--------------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Mobility aid | 71.3% | 69.0% | 51.7% | 61.8% | 64.7% | 29.1% | 0.0% | 60.1% |
| Personal assistance | 29.9% | 20.0% | 0.0% | 22.4% | 25.5% | 12.7% | 0.0% | 9.3% |
| NA- No one needed assistance | 2.5% | 7.3% | 35.4% | 12.1% | 0.0% | 58.2% | 0.0% | 30.7% |
| Orientation and Mobility Assistance | 7.5% | 6.4% | 0.0% | 5.8% | 9.8% | 0.0% | 0.0% | 9.3% |
| Other | 5.0% | 6.3% | 0.0% | 2.9% | 0.0% | 0.0% | 0.0% | 0.0% |
| Disabled parking/ placard | 2.5% | 1.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Print material in alternate format | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Lift equipped van | 0.0% | 0.0% | 12.9% | 2.9% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASL Interpreter/ texting/ captioning | 0.0% | 0.0% | 12.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Respiratory equipment | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Ambulance/ Hospital/ Medical visit | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| No help was offered | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BASE | 80 | 110 | 8 | 37 | 9 | 7 | 0 | 12 |

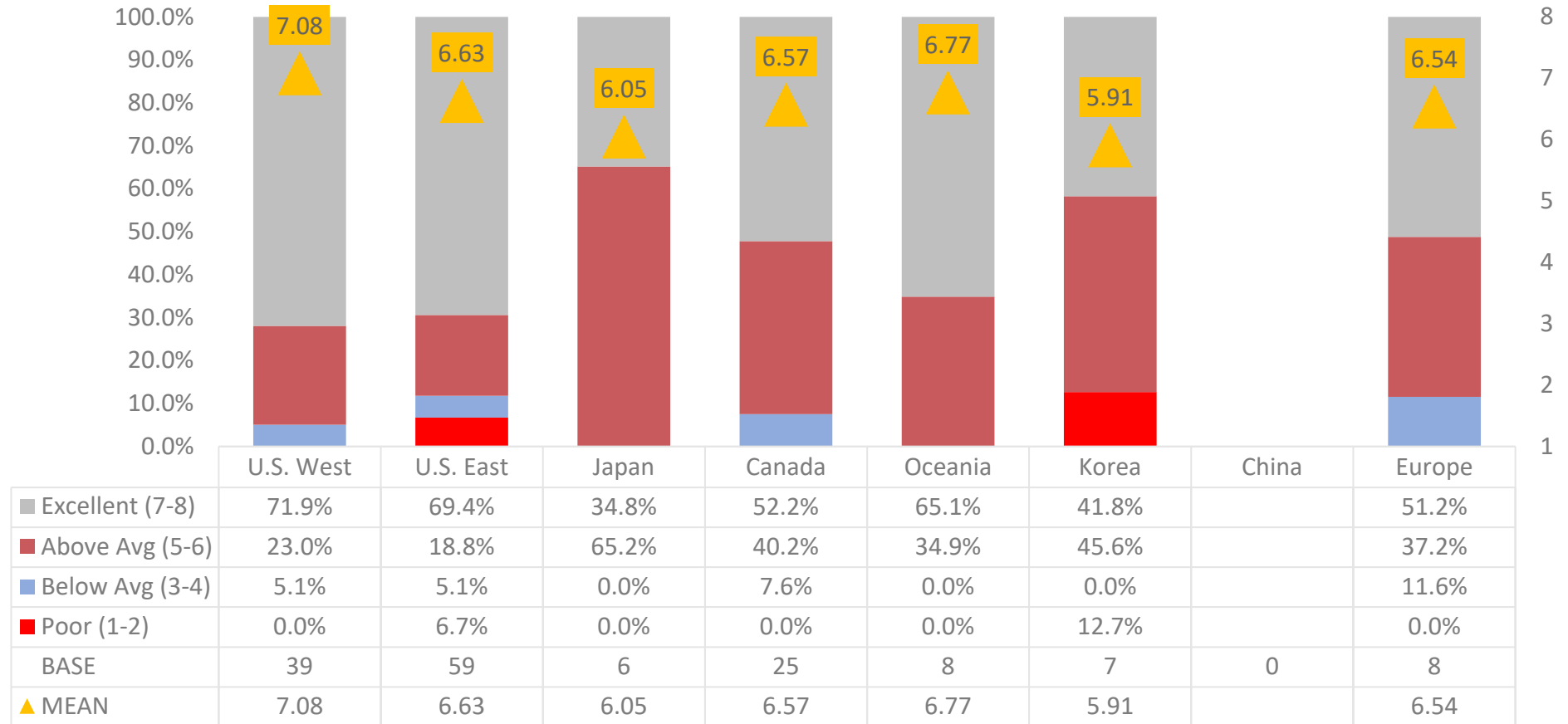
OVERALL ACCESSIBILITY - AIRPORTS

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



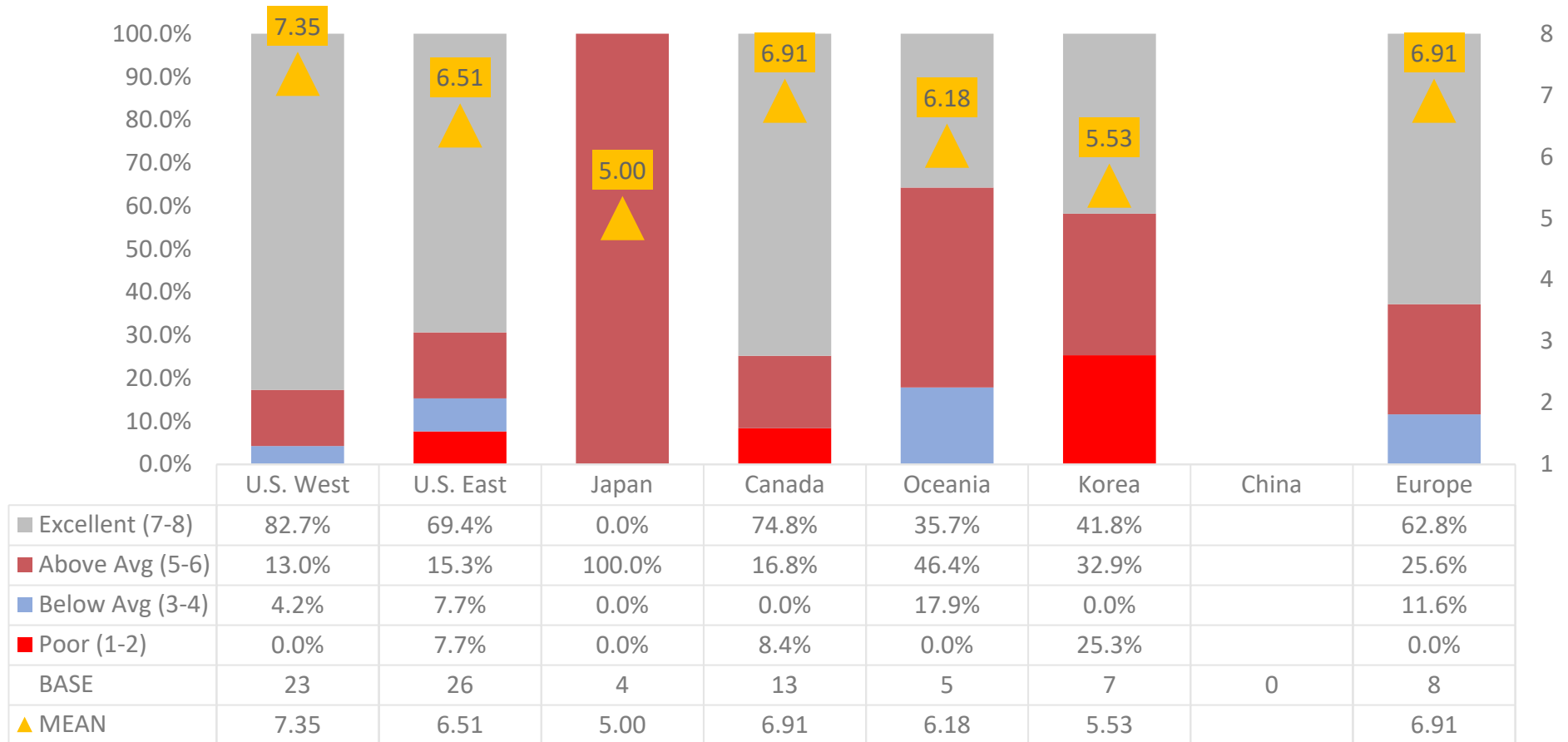
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



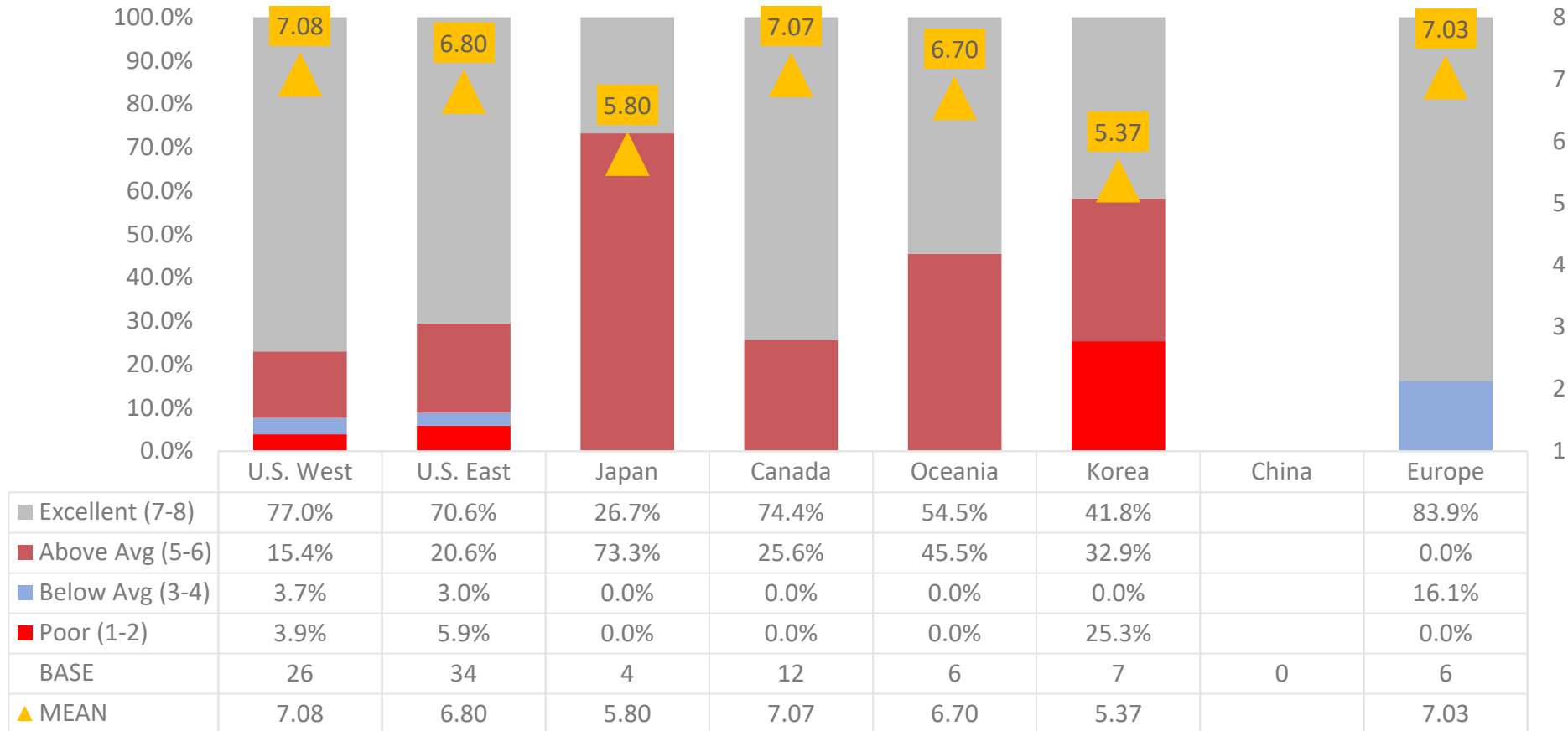
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



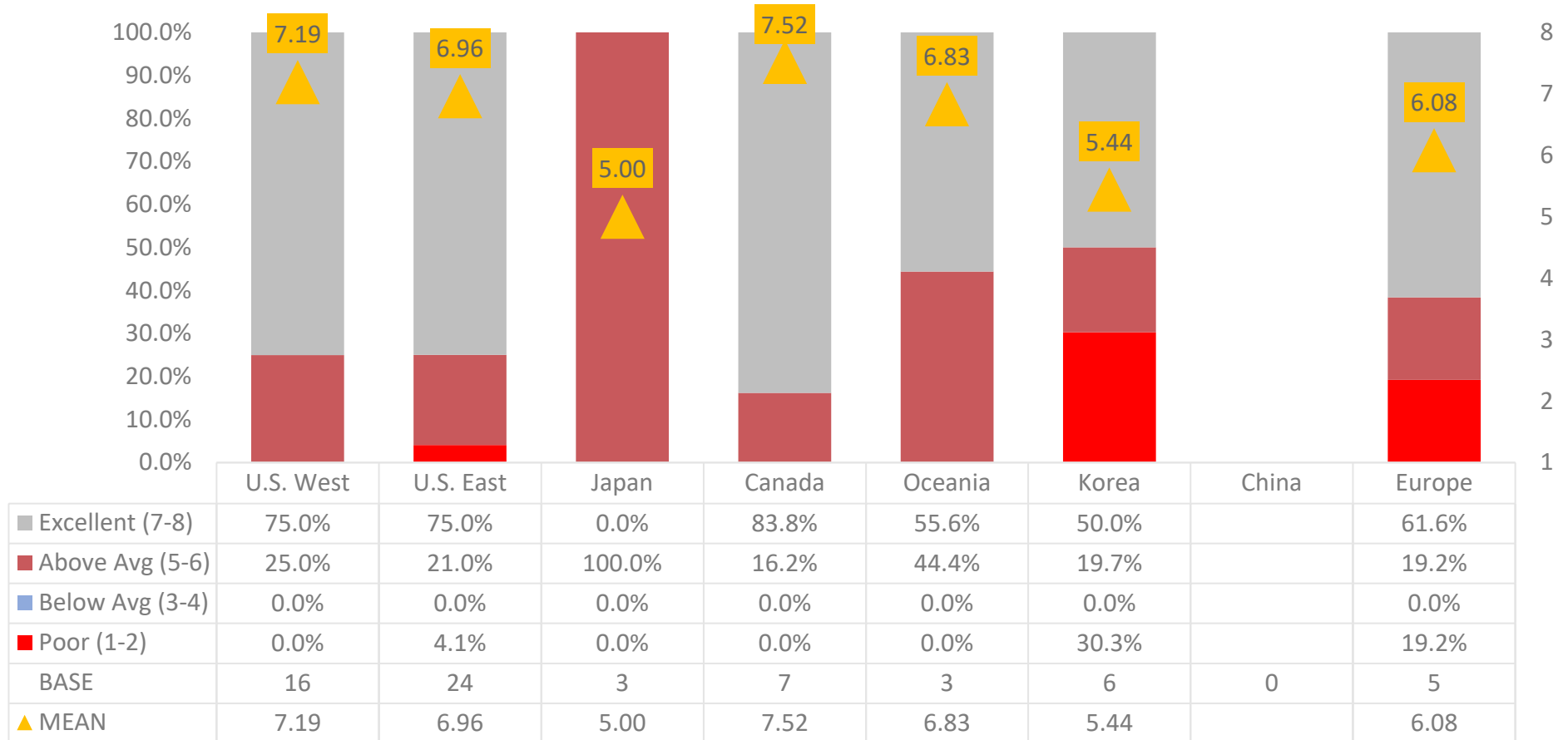
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



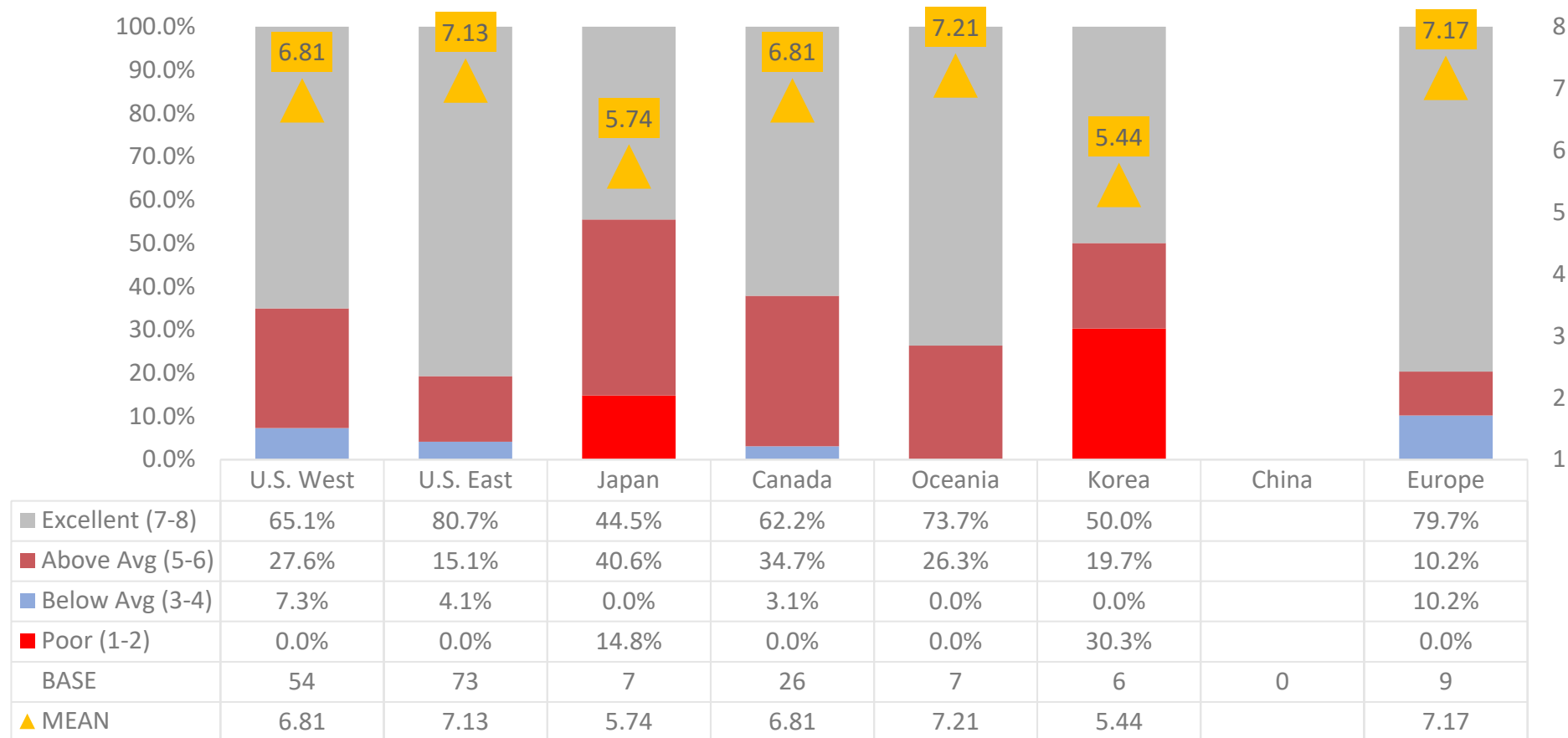
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



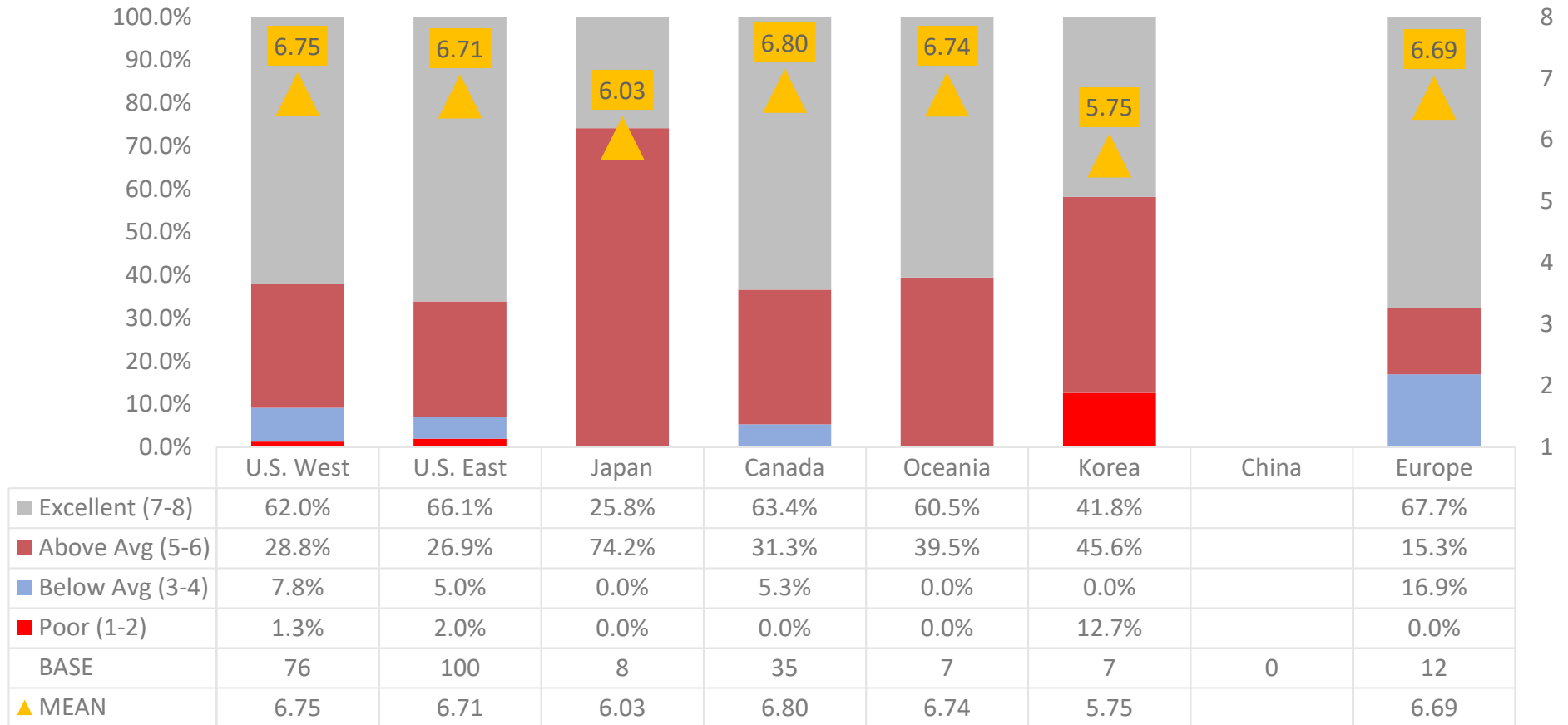
OVERALL ACCESSIBILITY - HOTELS

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



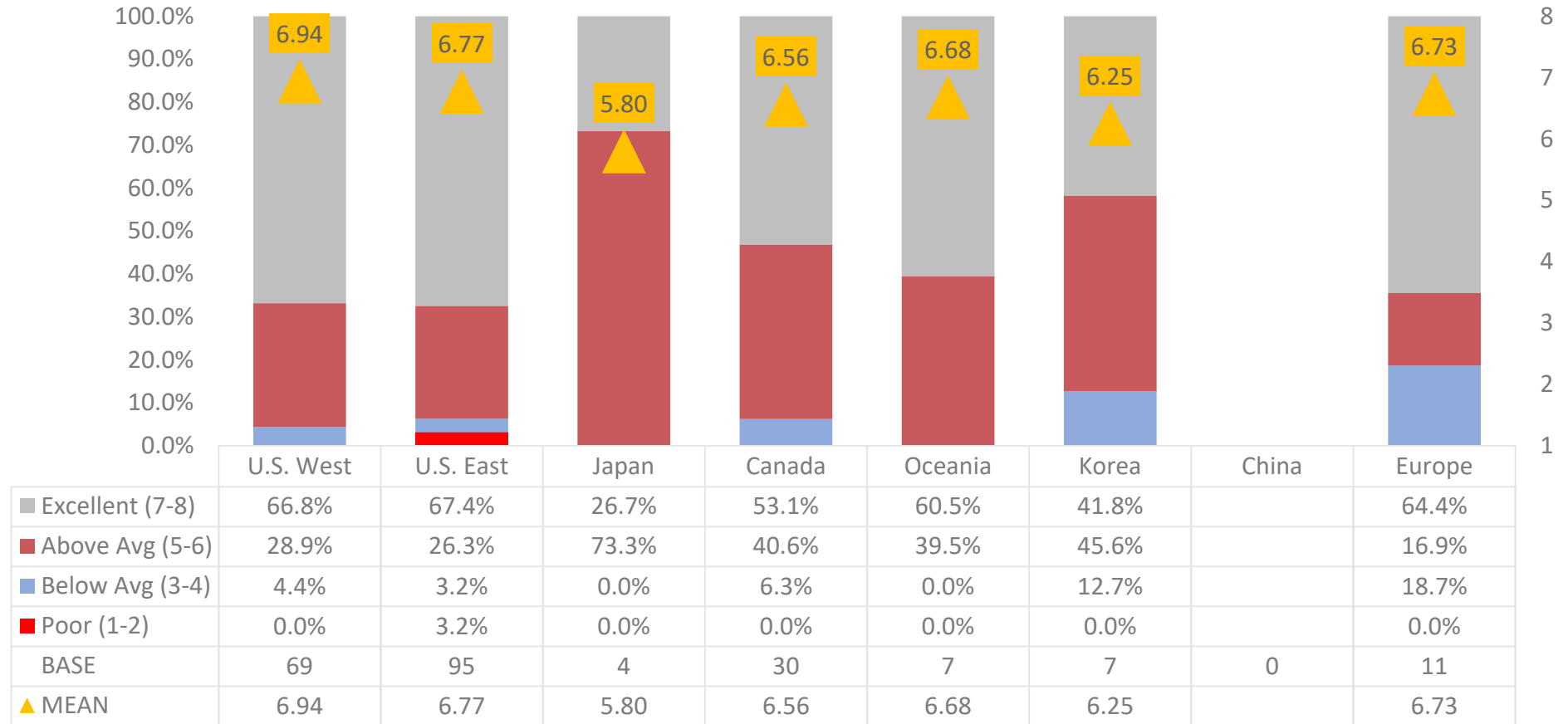
OVERALL ACCESSIBILITY - RESTAURANTS

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



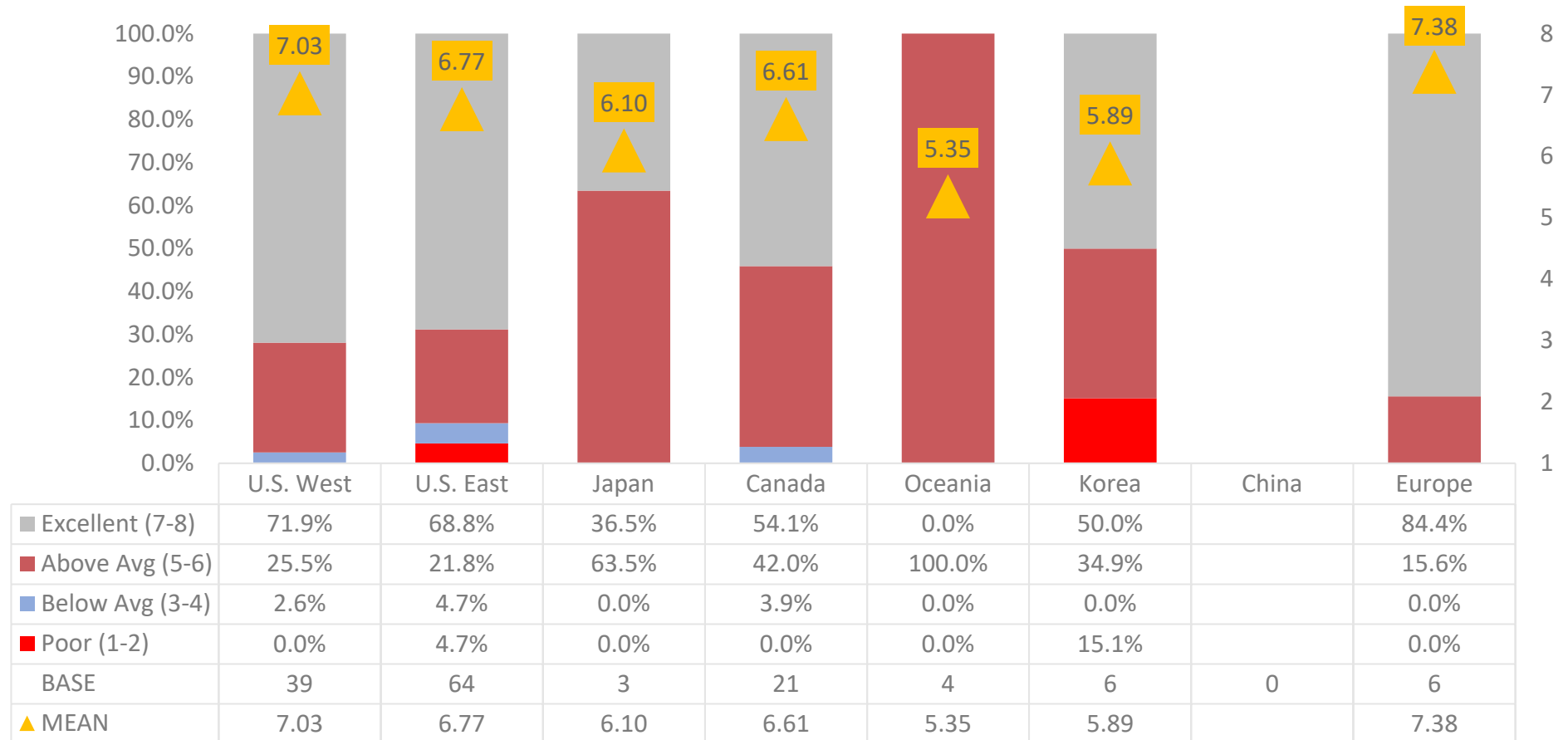
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



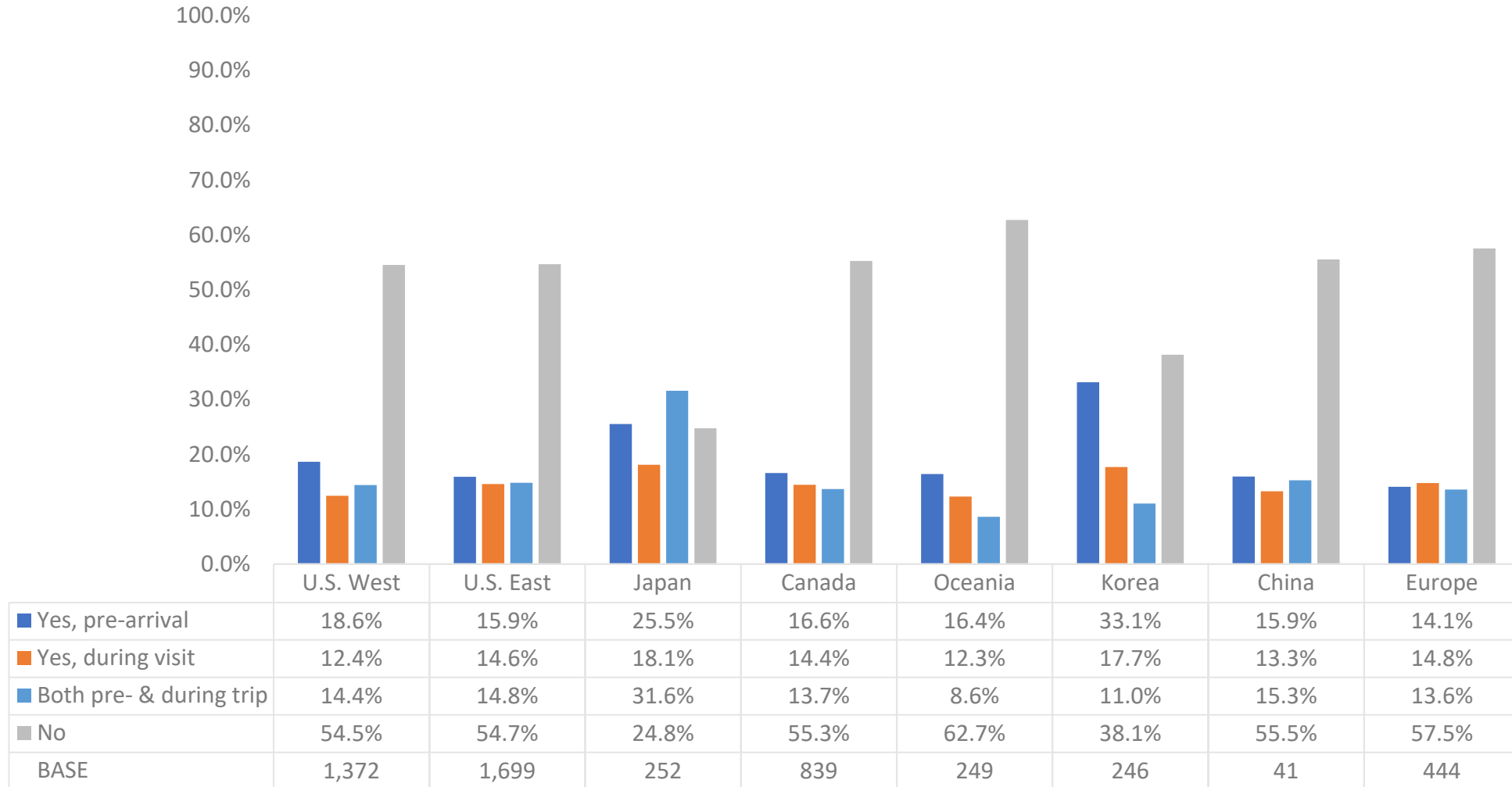
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

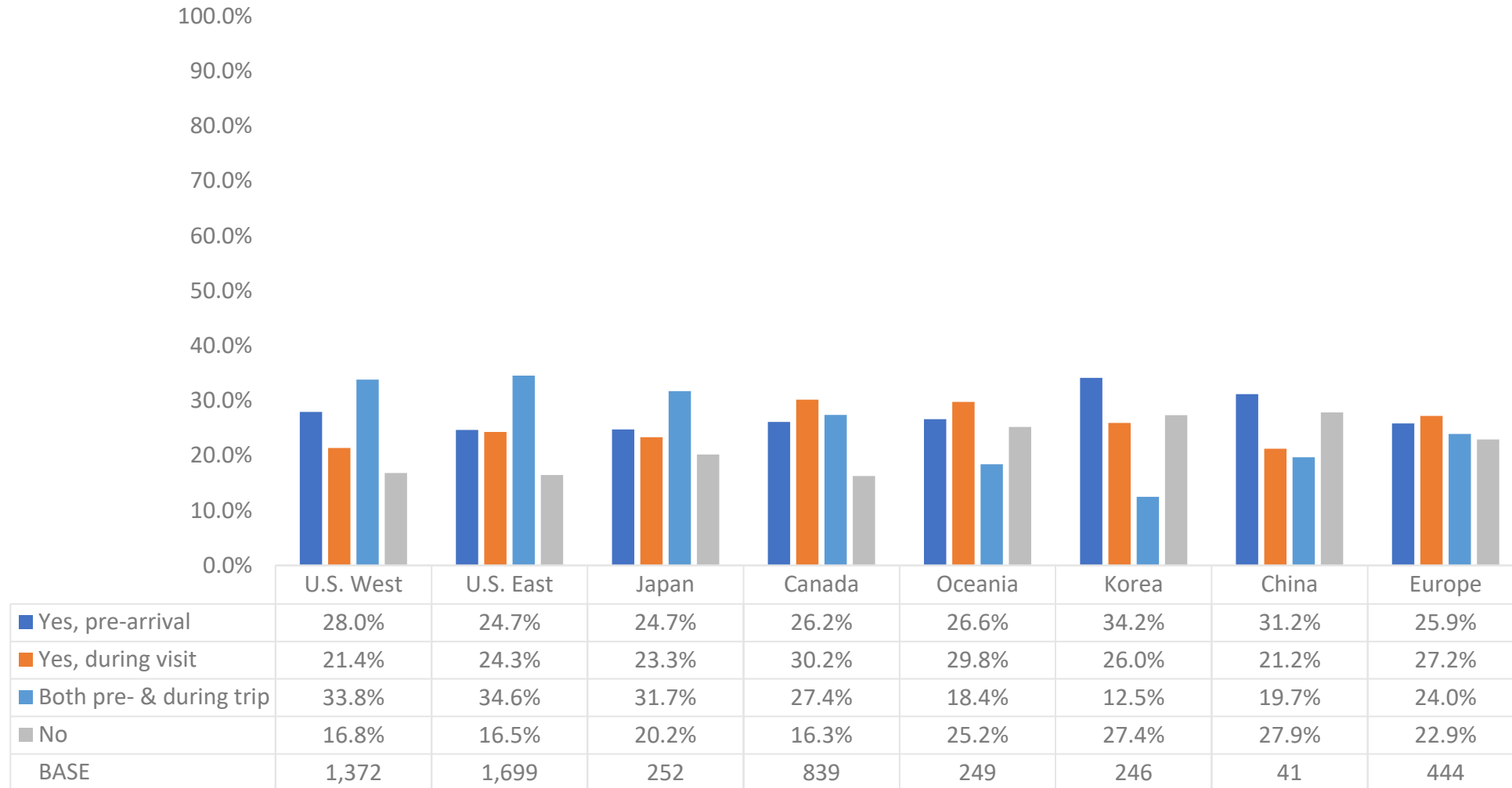


Section 4 – Alternative Messaging

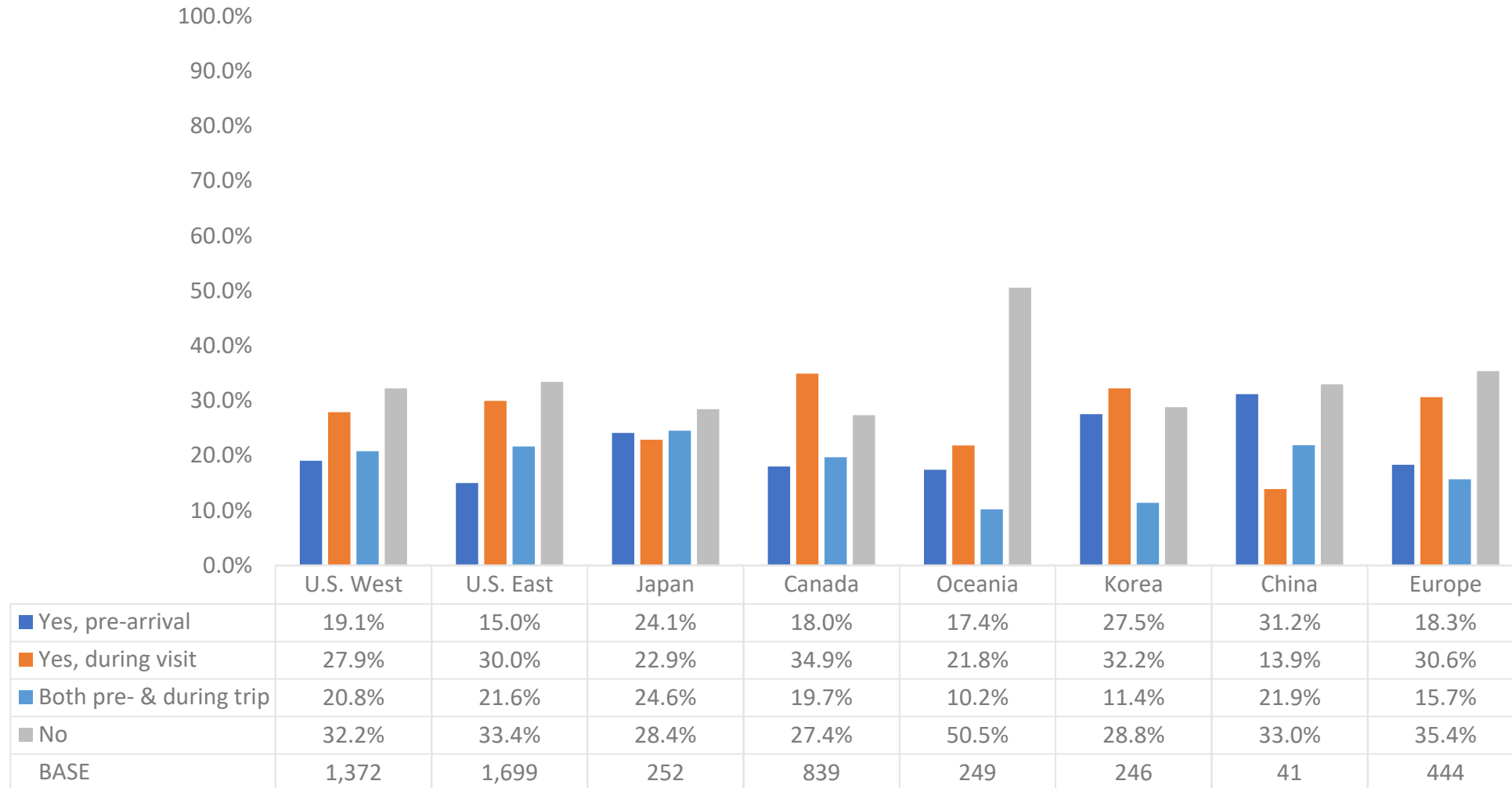
SAFE AND RESPONSIBLE TRAVEL



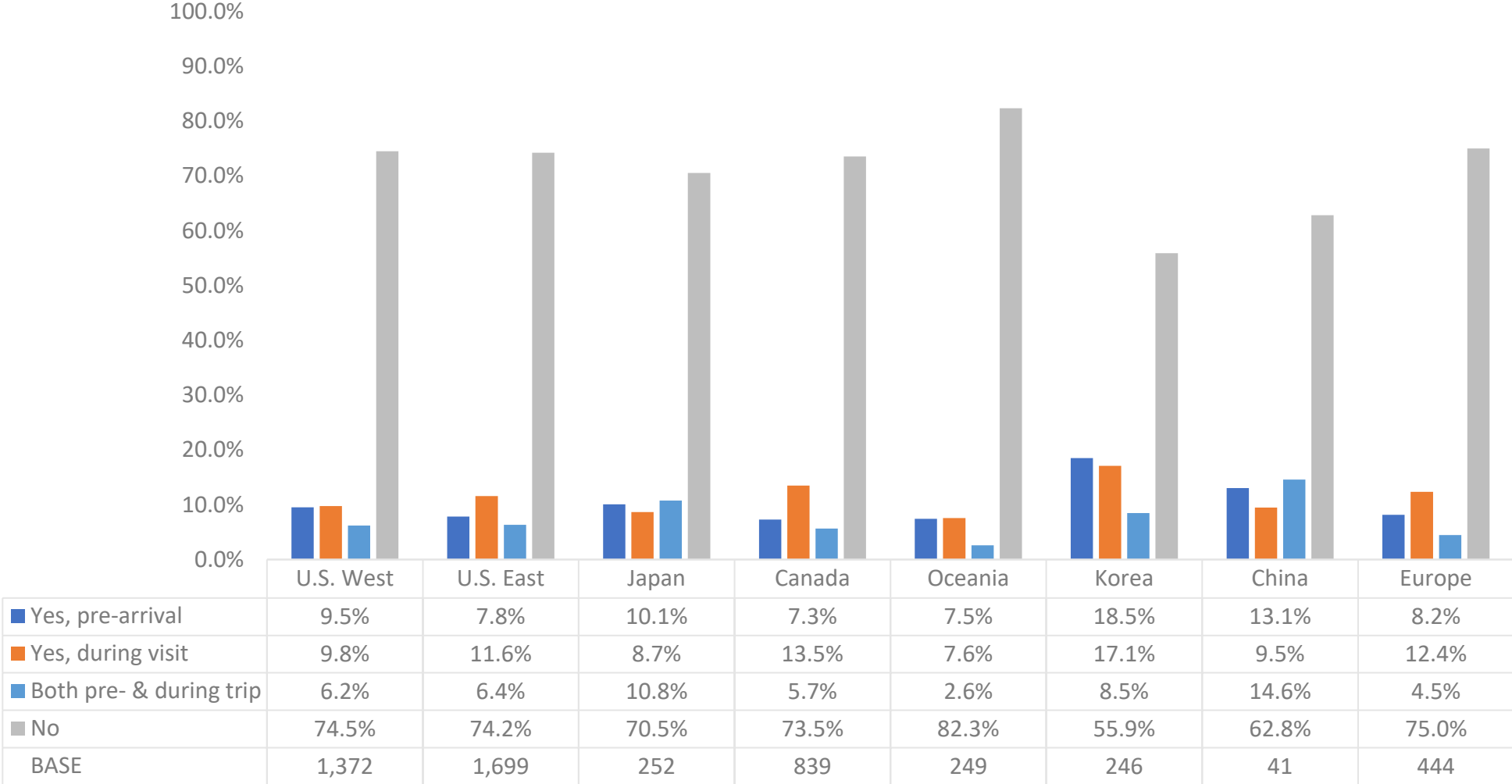
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



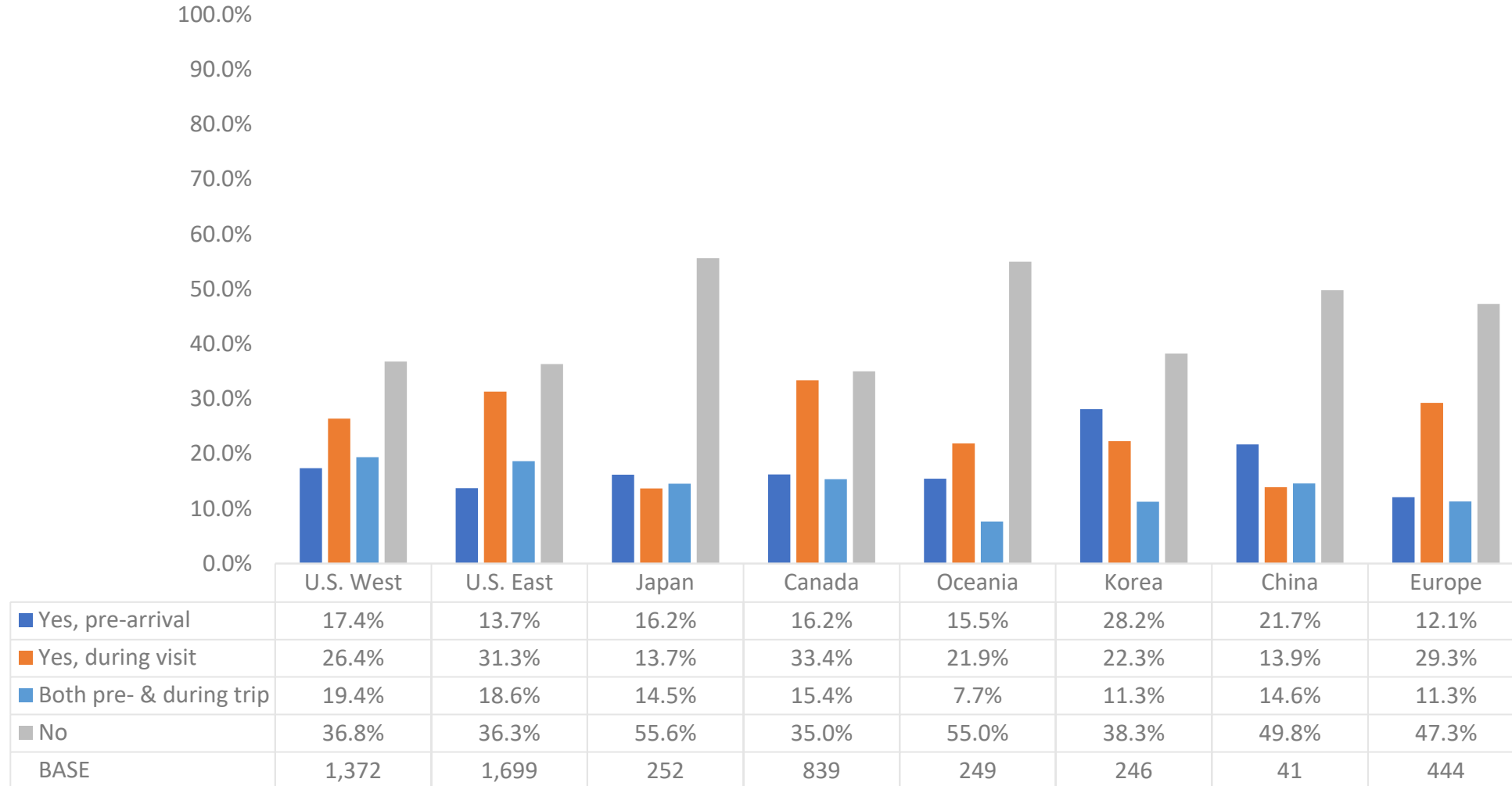
OCEAN AND HIKING SAFETY



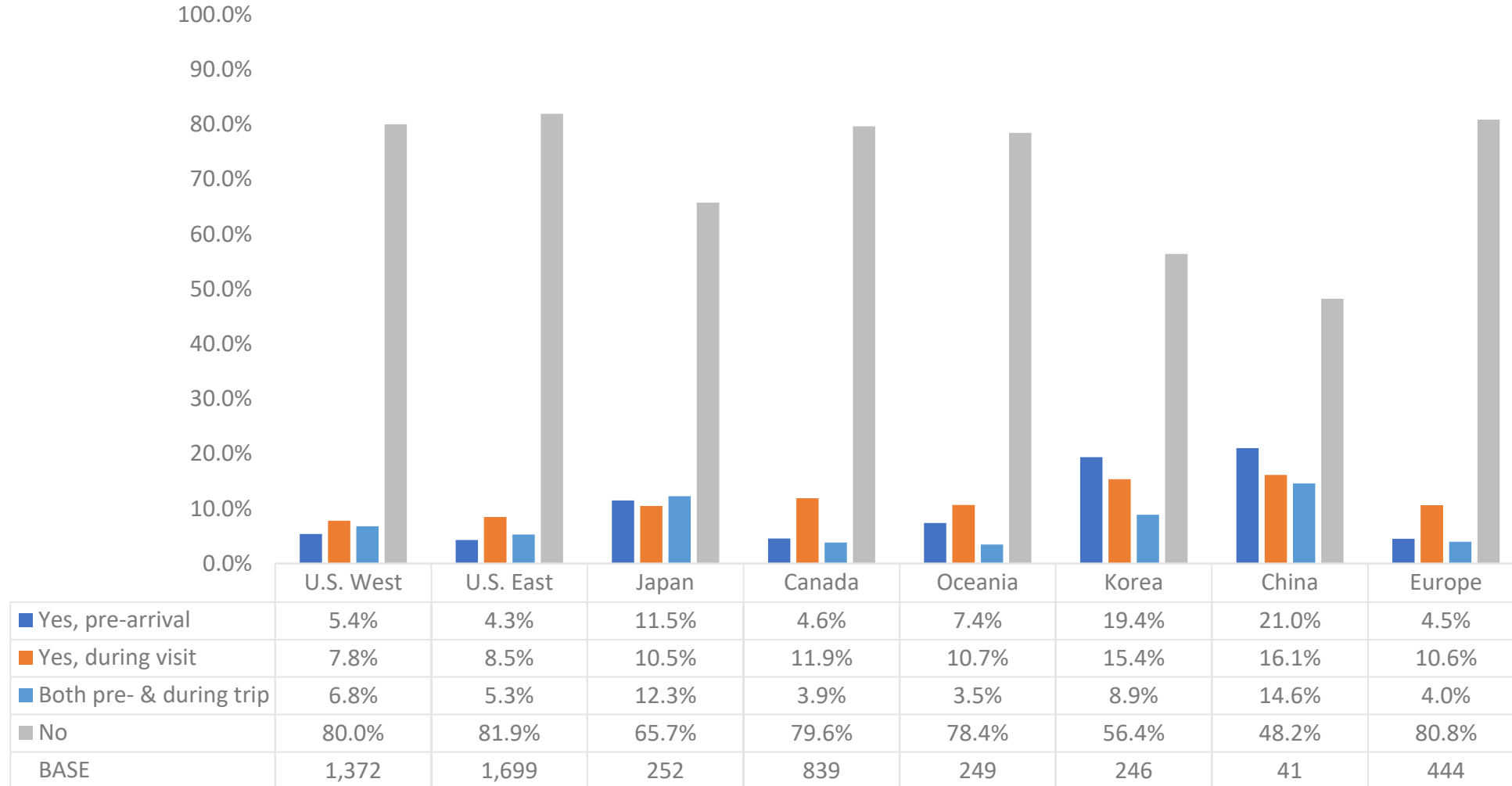
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL



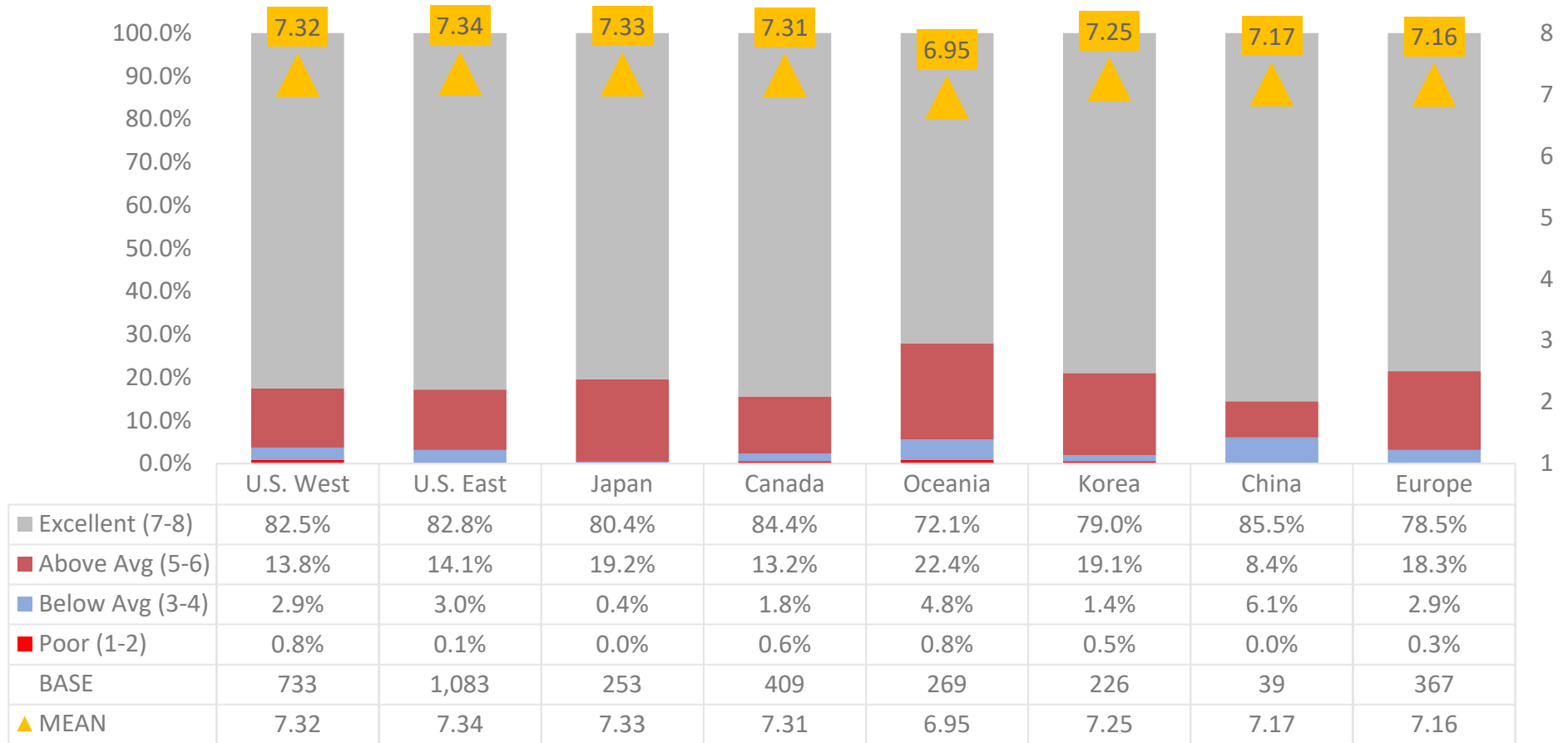
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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



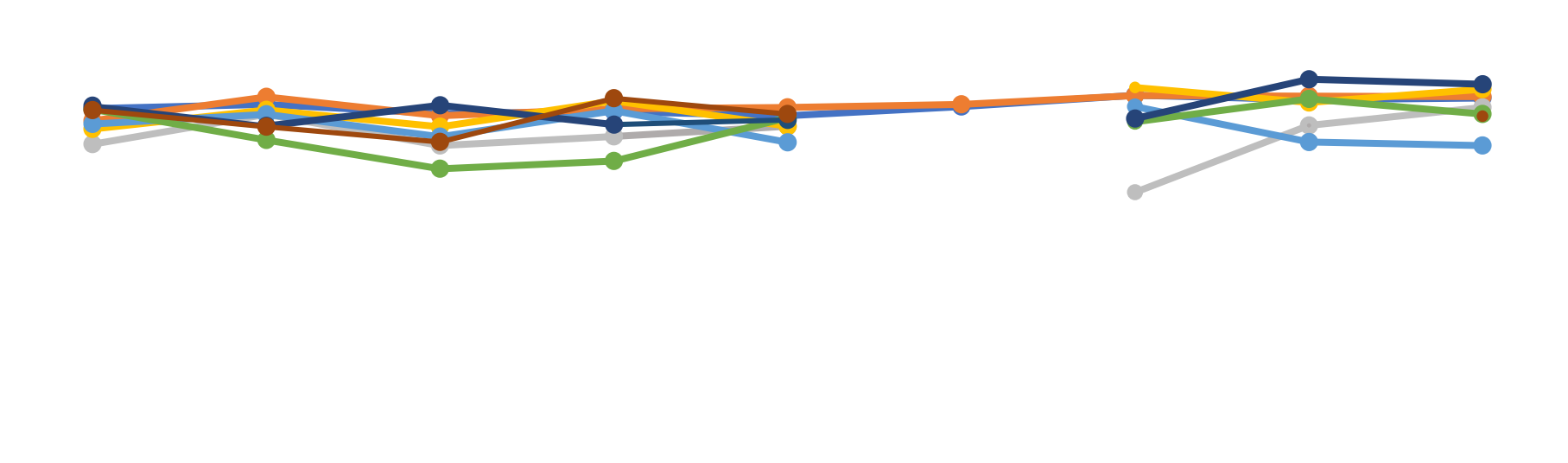
SATISFACTION - O'AHU

- **Gender:** Females from **U.S. West** expressed higher levels of satisfaction compared to males from this market.
- **Age:** Younger visitors from the following visitor markets expressed higher degrees of satisfaction: **U.S. West** (18-34/ 35-49) and **Japan** (18-34).
- **Trips to Hawai'i:** First-time visitors to the state from **Japan** were more satisfied with their stay on O'ahu compared to repeat visitors.
- **Islands visited:** Visitors from **U.S. West, U.S. East** and **Japan** whose trip consisted of staying on just O'ahu gave the island a higher mean satisfaction score than those who also visited one or more of the Neighbor Islands during their stay.
- **Education:** Visitors from **Japan** without a college degree were more satisfied with their stay than college graduates.

SATISFACTION - O'AHU

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

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



| | Q1 2016 | Q1 2017 | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 80.2% | 81.1% | 79.1% | 79.5% | 78.6% | 80.6% | 83.1% | 82.1% | 82.5% |
| U.S. East | 77.5% | 82.7% | 78.6% | 80.1% | 80.4% | 81.1% | 83.0% | 82.9% | 82.8% |
| Japan | 72.4% | 78.9% | 72.1% | 74.1% | 76.3% | | 61.9% | 76.5% | 80.4% |
| Canada | 75.7% | 79.9% | 76.2% | 81.9% | 76.3% | | 84.8% | 81.5% | 84.4% |
| Oceania | 76.8% | 78.9% | 74.0% | 79.7% | 72.8% | | 80.6% | 72.9% | 72.1% |
| Korea | 80.0% | 73.3% | 67.0% | 68.7% | 78.2% | | 77.3% | 82.3% | 79.0% |
| China | 80.8% | 76.4% | 80.9% | 76.7% | 77.7% | | 78.0% | 86.6% | 85.5% |
| Europe | 79.8% | 76.2% | 72.9% | 82.4% | 79.0% | | | | 78.5% |

P= Preliminary Data

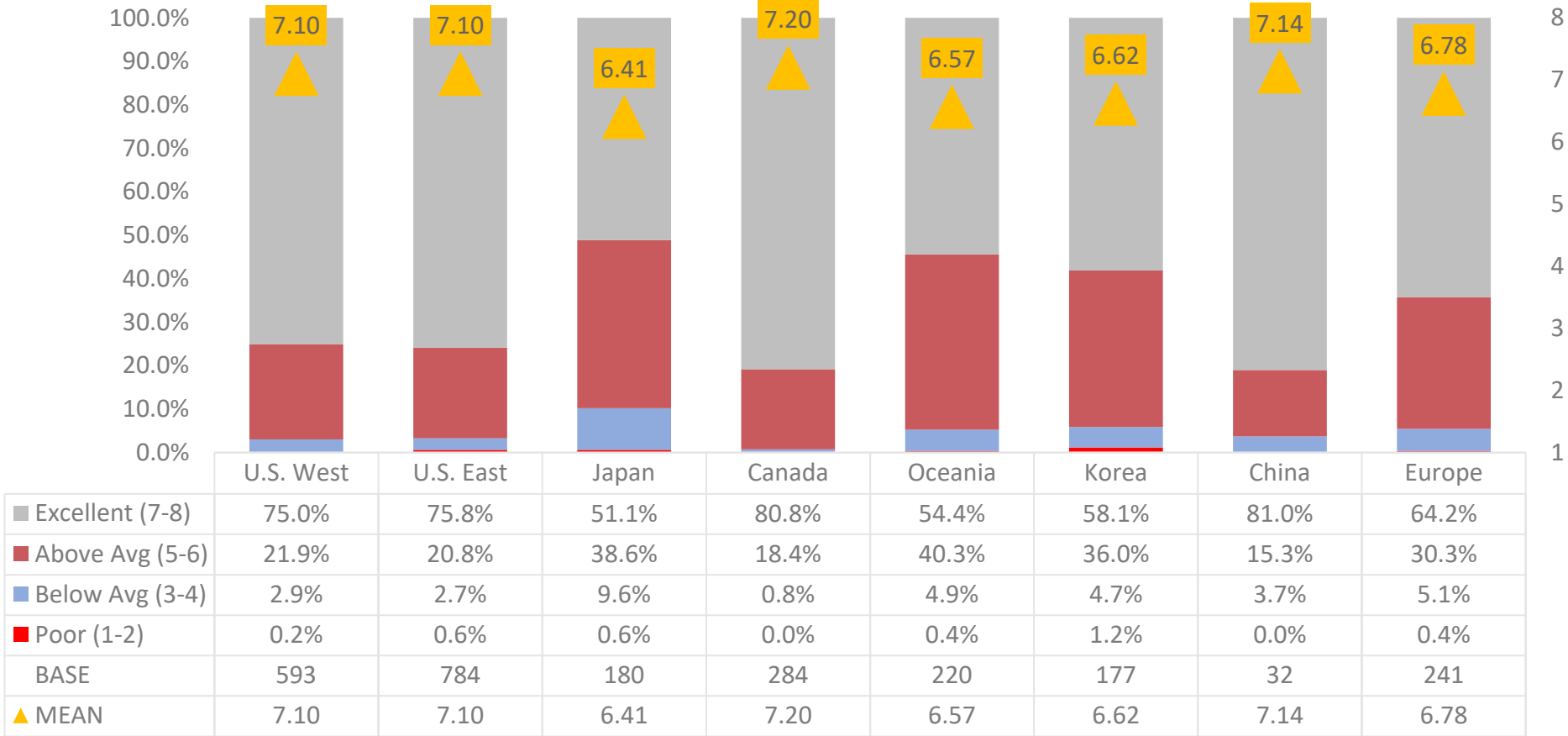
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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



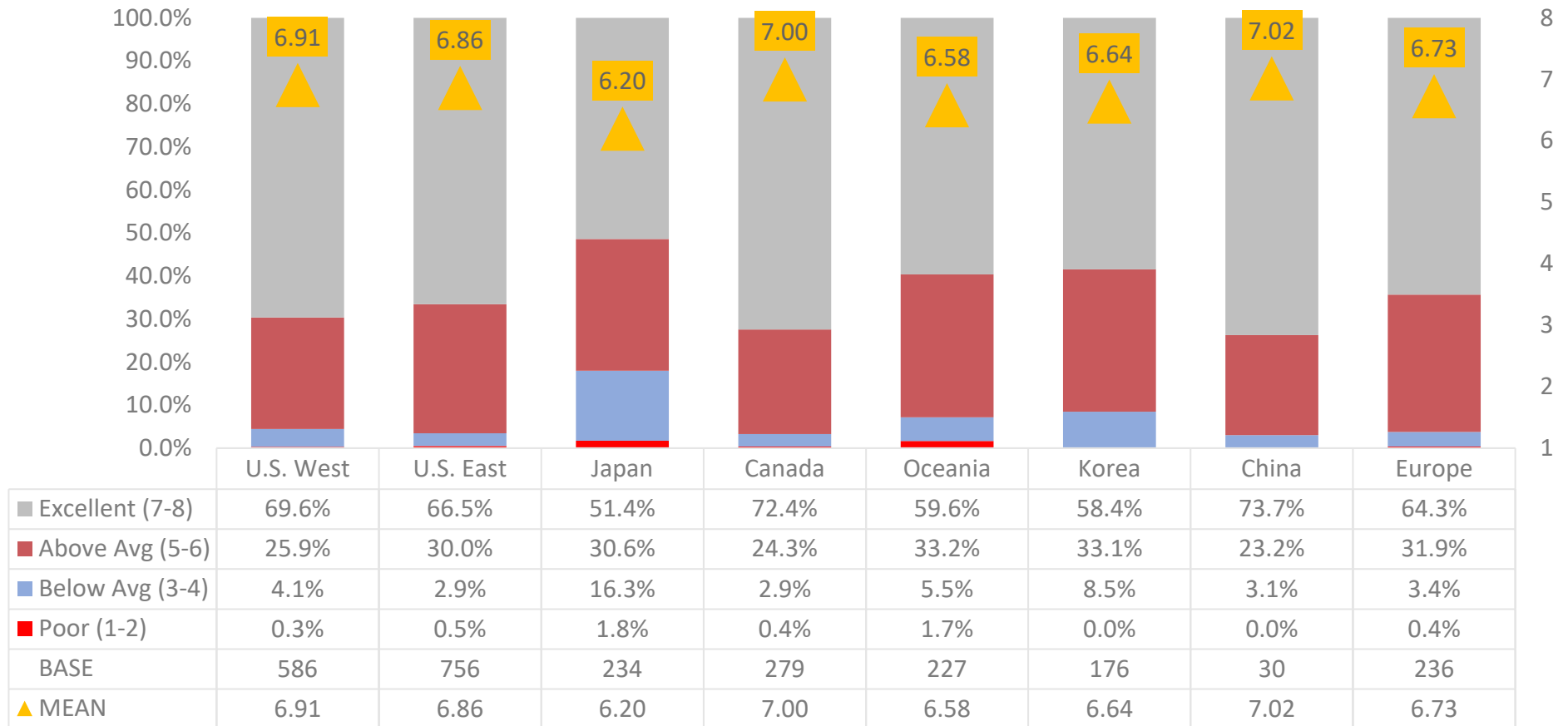
ENTERTAINMENT/ ATTRACTIONS - O‘AHU

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



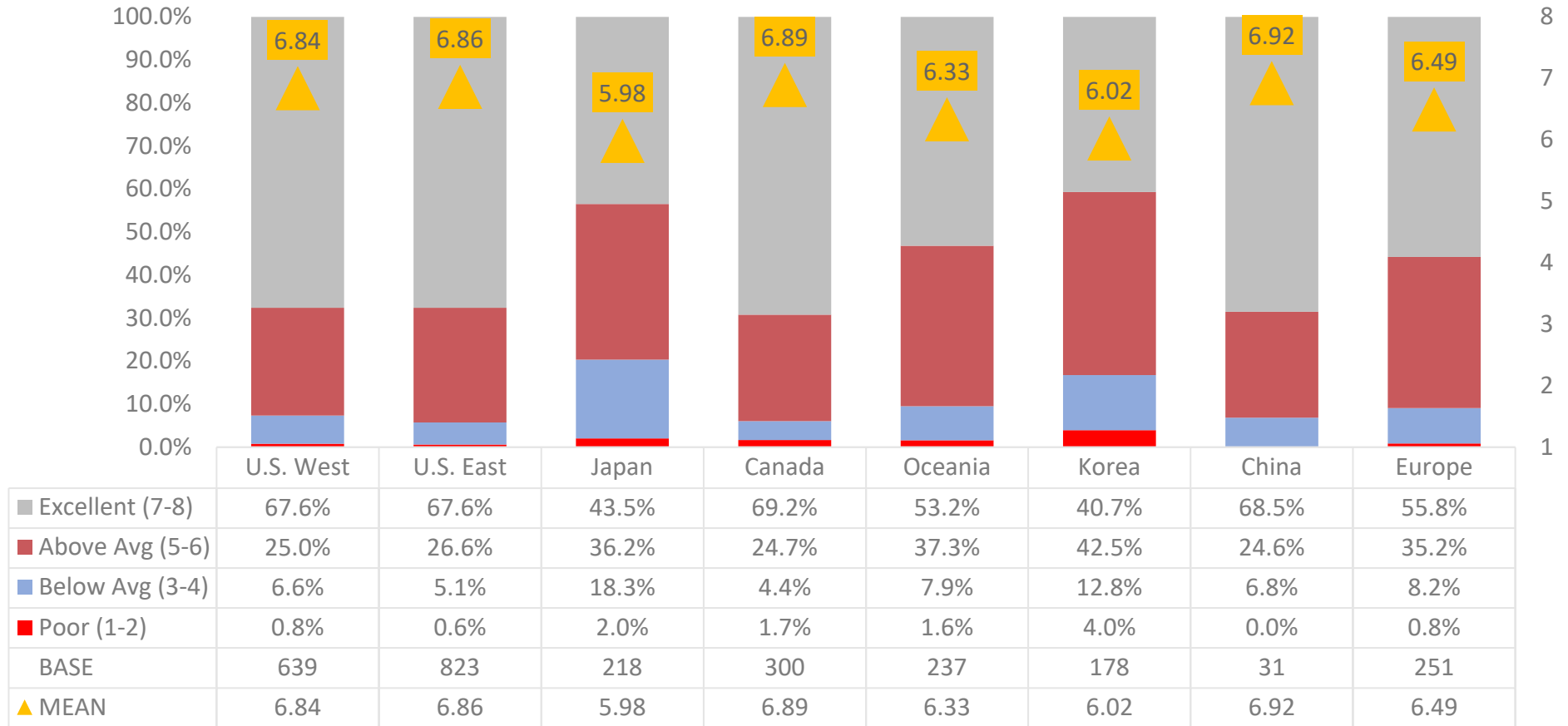
SHOPPING - O‘AHU

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



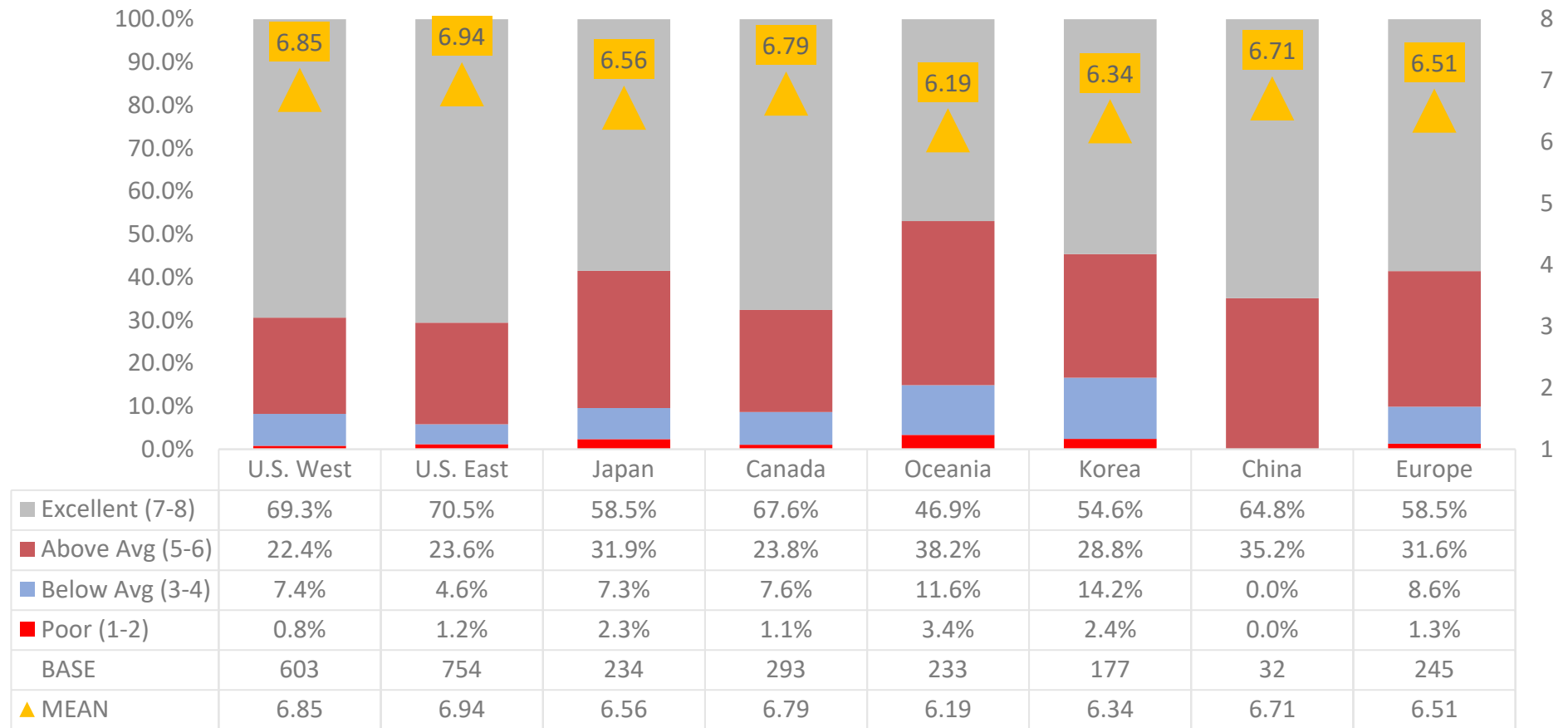
DINING/ FOOD & BEVERAGES - O'AHU

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



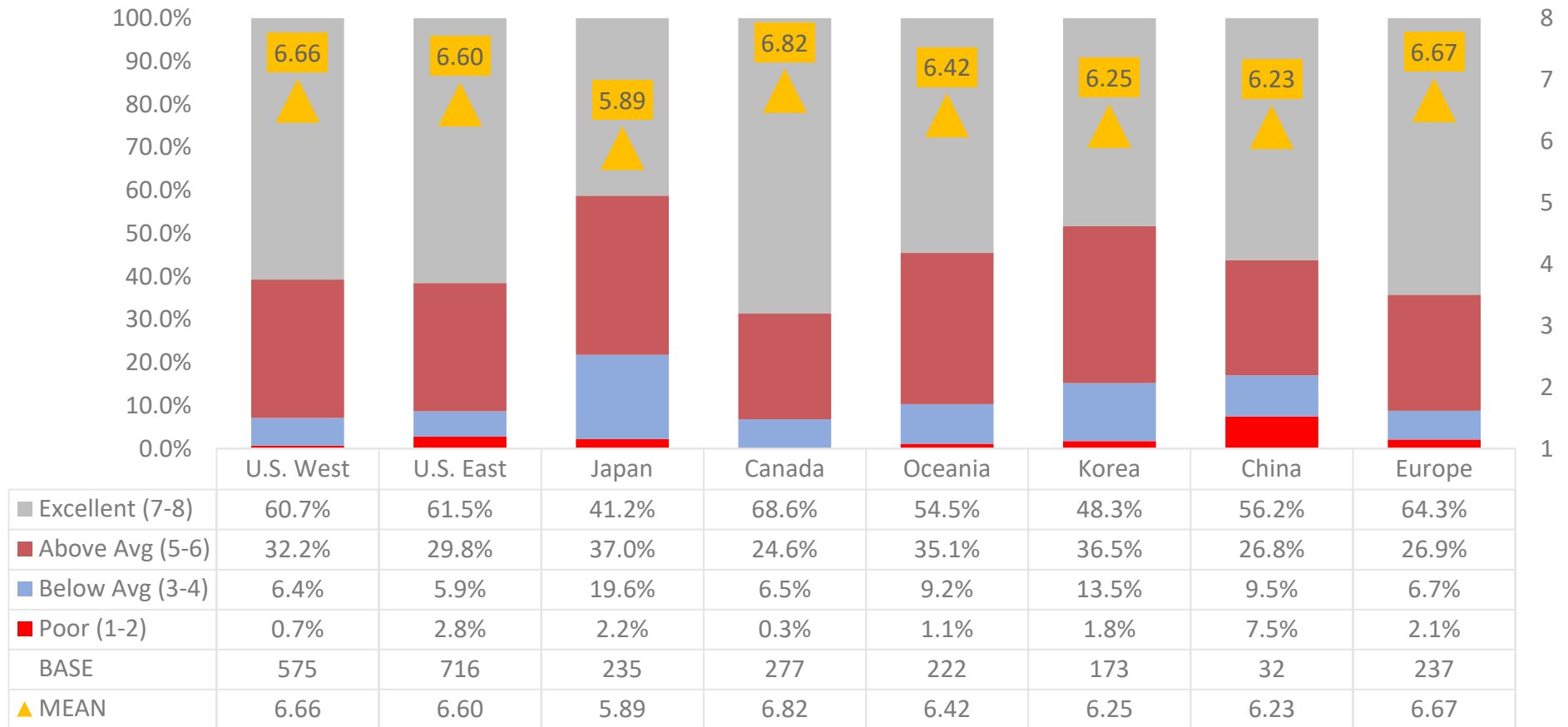
LODGING/ ACOMMODATIONS - O'AHU

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



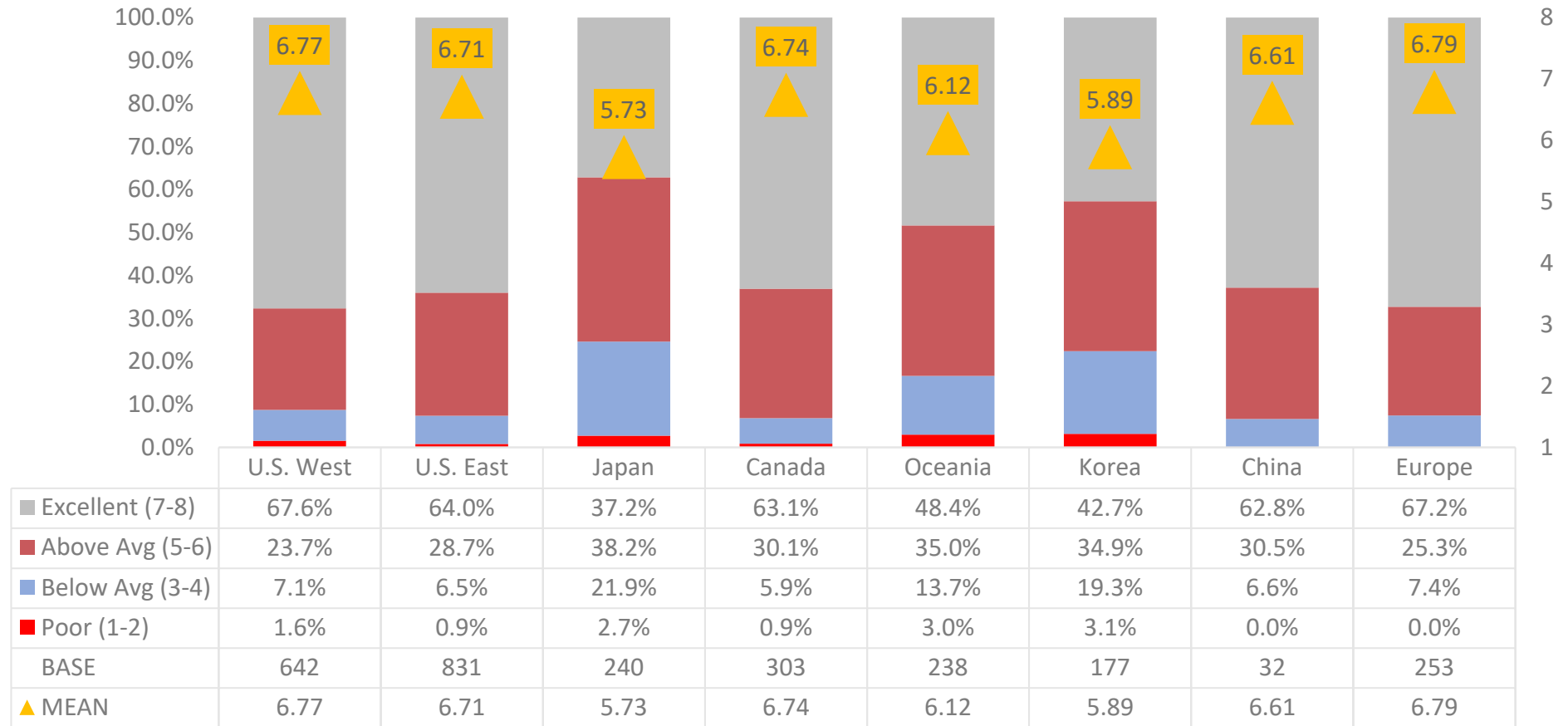
TRANSPORTATION ON ISLAND - O‘AHU

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



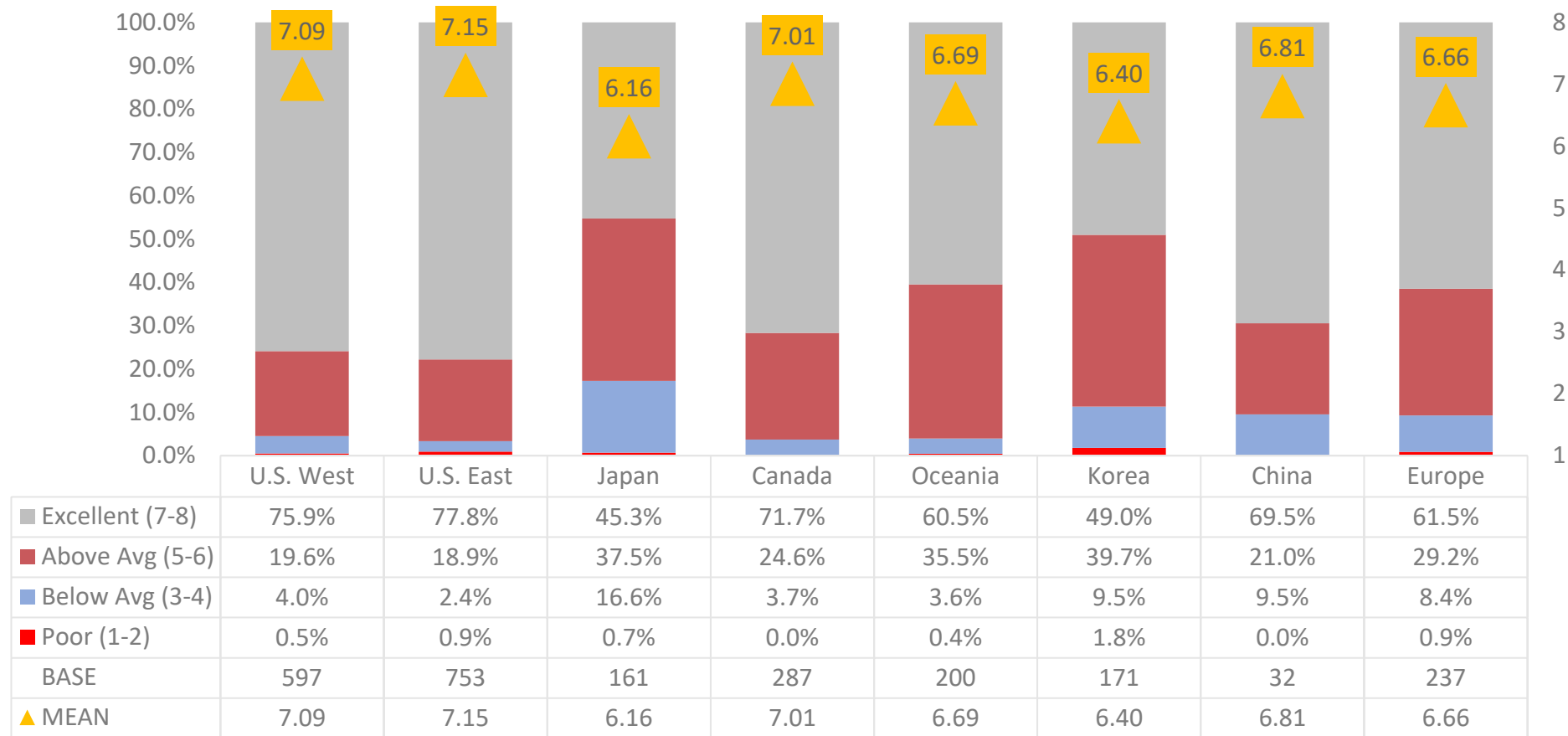
AIRPORT - O'AHU

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



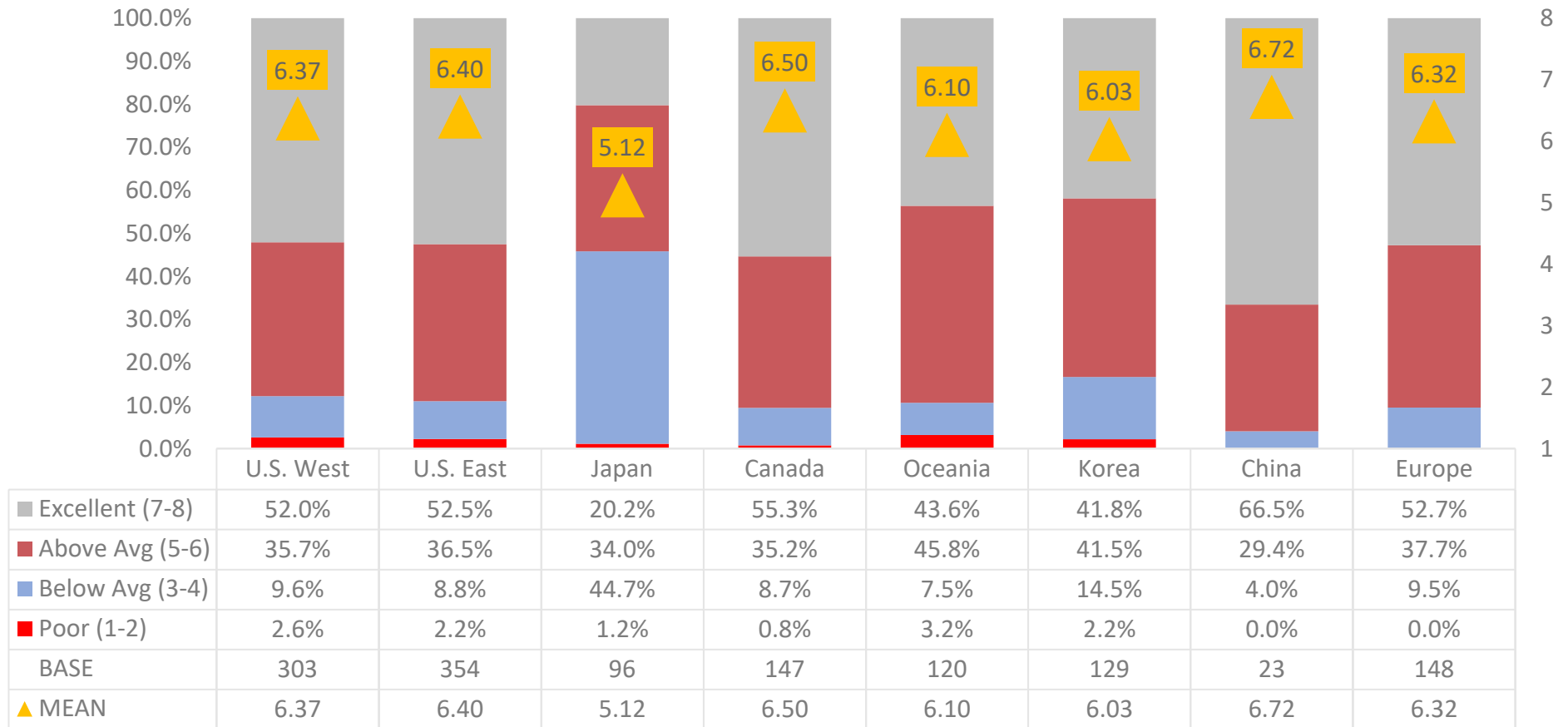
CULTURAL EXPERIENCES - O'AHU

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



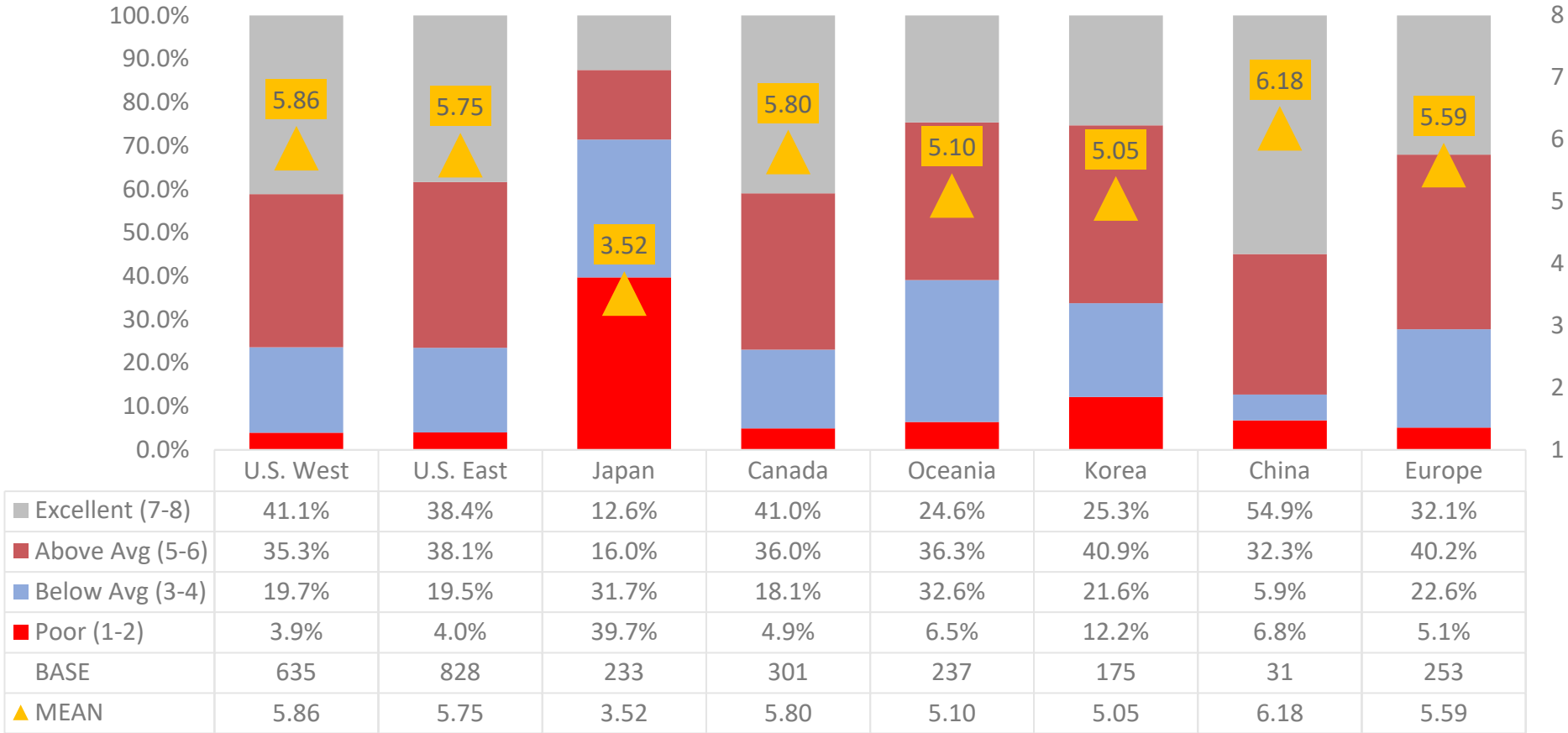
VOLUNTEER EXPERIENCES - O'AHU

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



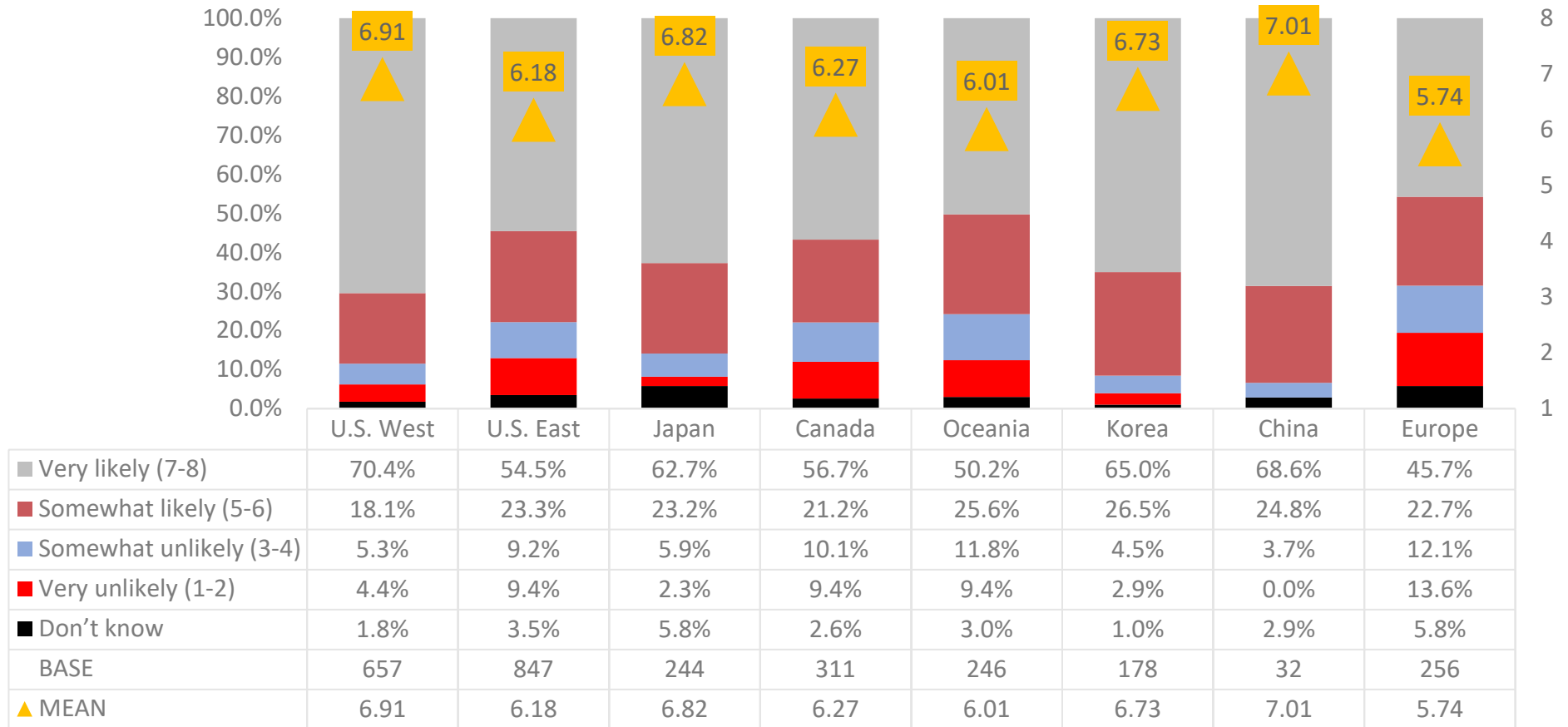
OVERALL VALUE FOR THE MONEY - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

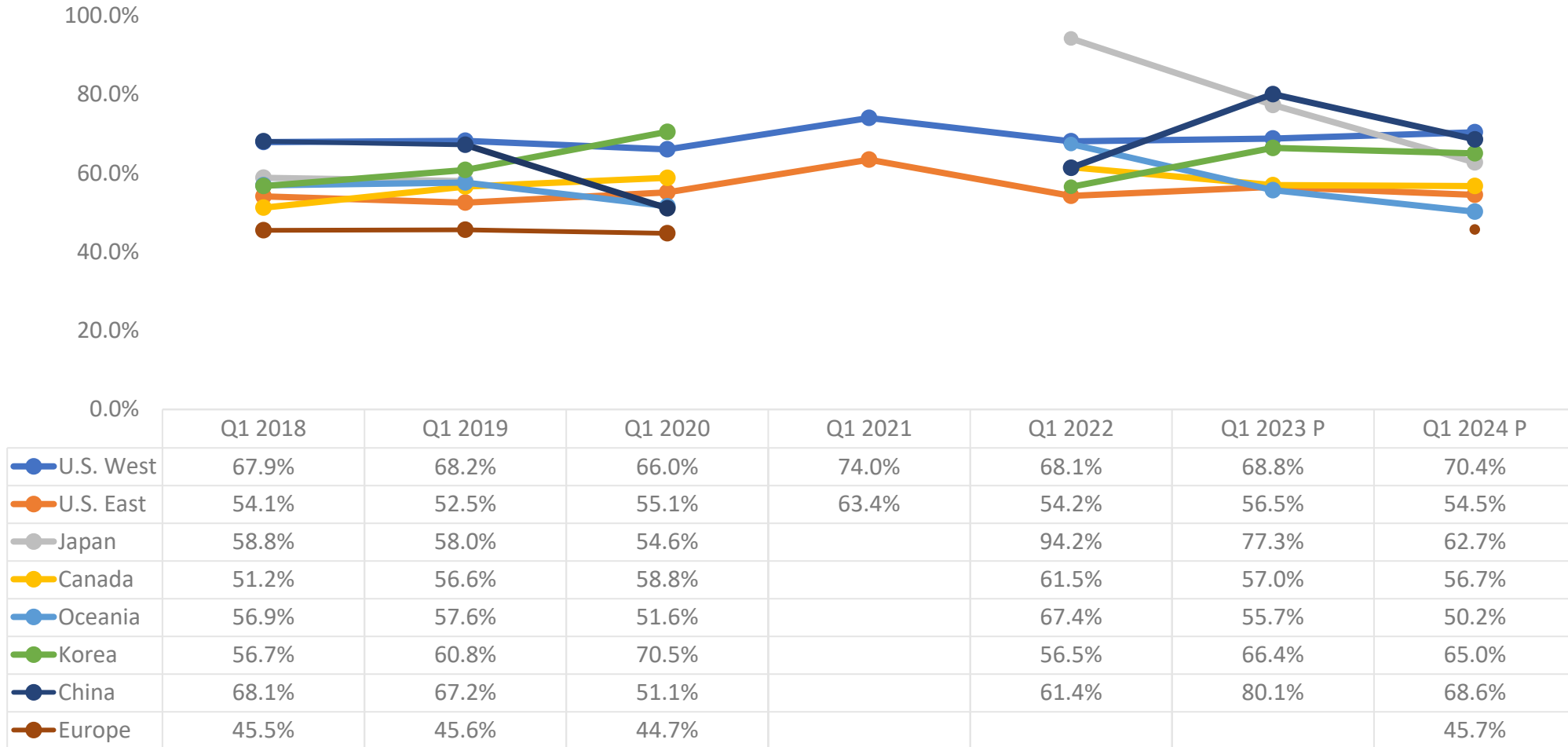
8-pt Rating Scale
8 = Excellent / 1 = Poor



LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

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



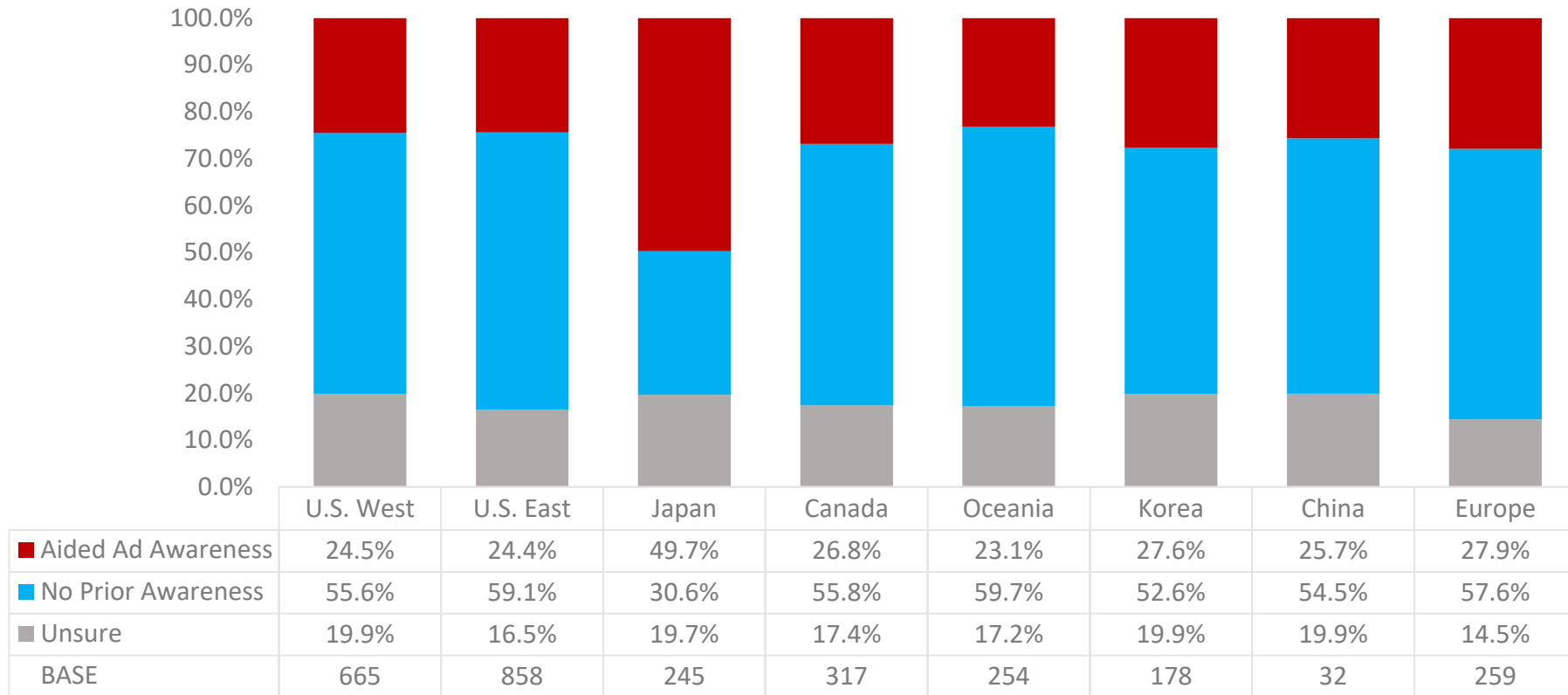
P= Preliminary Data

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

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



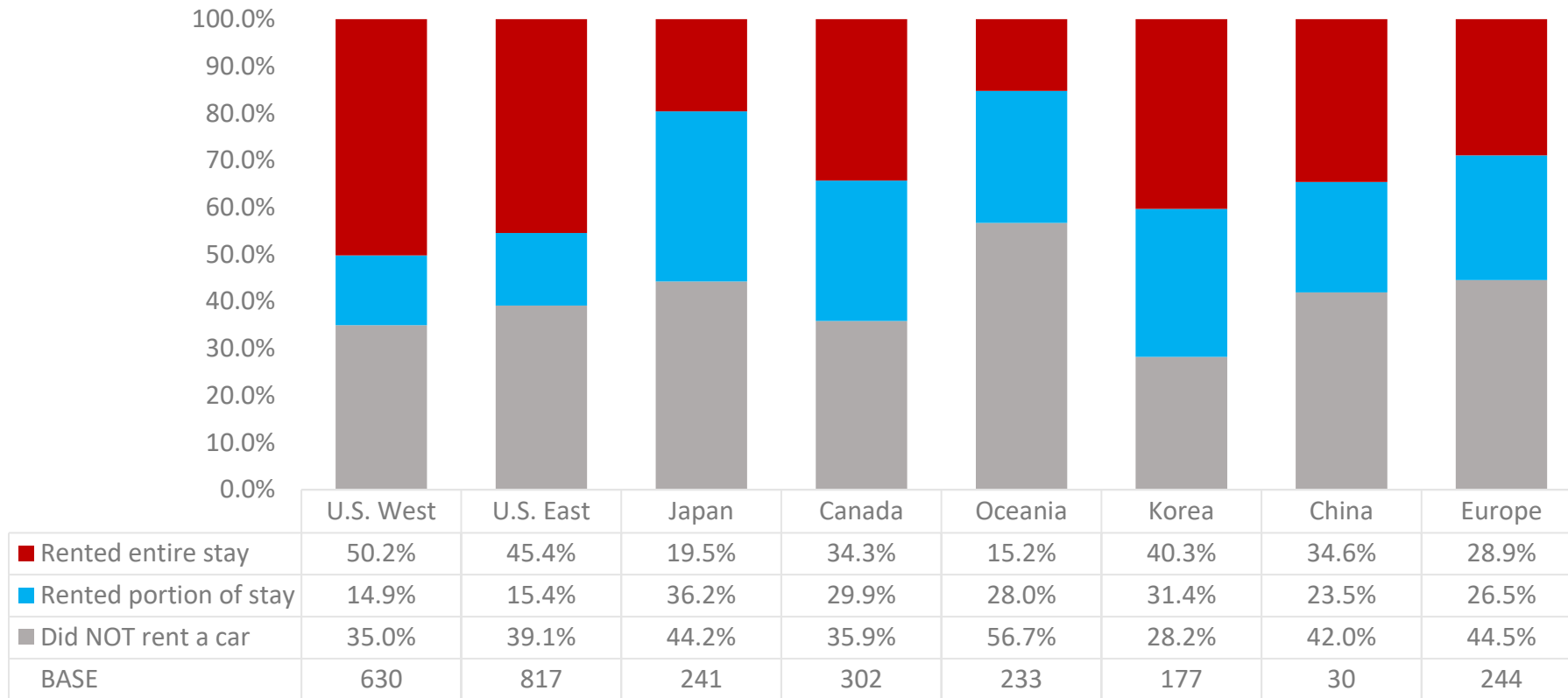
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O‘AHU

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Famous landmarks or imagery/ natural beauty | 39.6% | 43.8% | 38.4% | 47.9% | 46.6% | 58.0% | 61.1% | 49.2% |
| Hawaiian cultural events | 15.6% | 12.5% | 15.2% | 18.1% | 9.3% | 2.4% | 9.5% | 16.0% |
| Outdoor or sporting activities and events | 13.2% | 11.9% | 8.0% | 20.7% | 6.8% | 10.7% | 9.5% | 12.7% |
| Social media posts and videos | 10.9% | 10.5% | 31.3% | 15.0% | 12.6% | 19.0% | 21.9% | 16.7% |
| Hawaiian music | 6.8% | 5.6% | 15.5% | 9.6% | 6.1% | 1.6% | 2.9% | 8.7% |
| Television programs or movies filmed in Hawai‘i | 7.4% | 9.0% | 40.8% | 15.3% | 17.7% | 14.0% | 15.3% | 22.3% |
| BASE | 661 | 855 | 244 | 317 | 250 | 178 | 32 | 258 |

CAR RENTAL - O'AHU



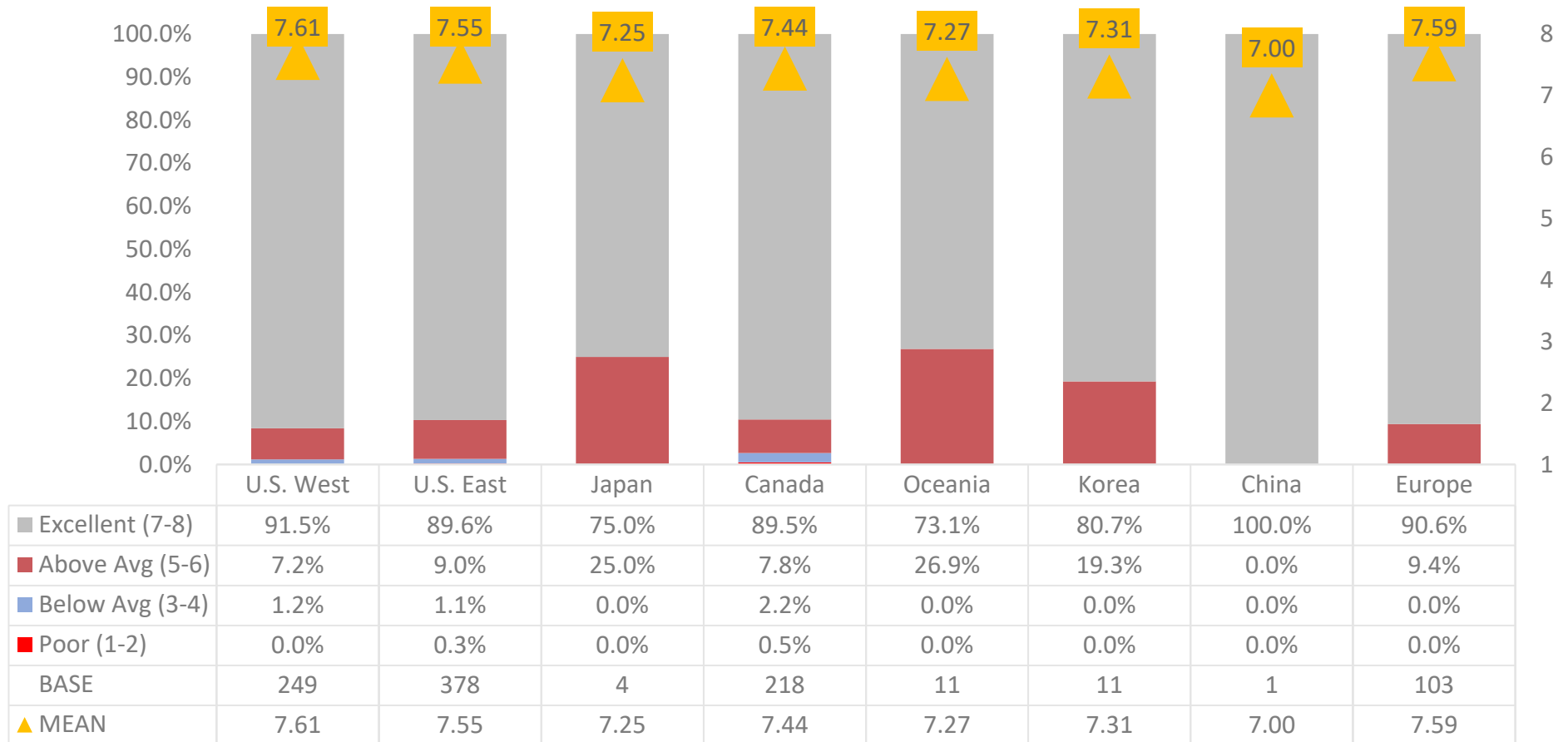
REASONS FOR PARTIAL RENTAL CAR - O'AHU

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| I only needed a vehicle on certain dates | 71.0% | 79.2% | 82.1% | 73.7% | 74.5% | 61.3% | 69.7% | 70.4% |
| Parking was too expensive at my hotel/ lodging | 47.4% | 38.6% | 7.8% | 49.9% | 27.8% | 45.3% | 13.2% | 31.6% |
| Car rental rates were too expensive | 20.4% | 16.1% | 19.2% | 30.0% | 21.5% | 27.2% | 13.2% | 19.5% |
| Wanted to reduce my carbon footprint | 19.2% | 8.8% | 0.9% | 4.4% | 8.9% | 6.7% | 17.1% | 12.2% |
| Vehicles were not available for all of my trip dates | 1.1% | 1.6% | 1.3% | 3.1% | 8.1% | 7.7% | 0.0% | 2.9% |
| BASE | 93 | 124 | 87 | 89 | 63 | 57 | 7 | 65 |

Section 6 – Kaua‘i

SATISFACTION - KAUA'I

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

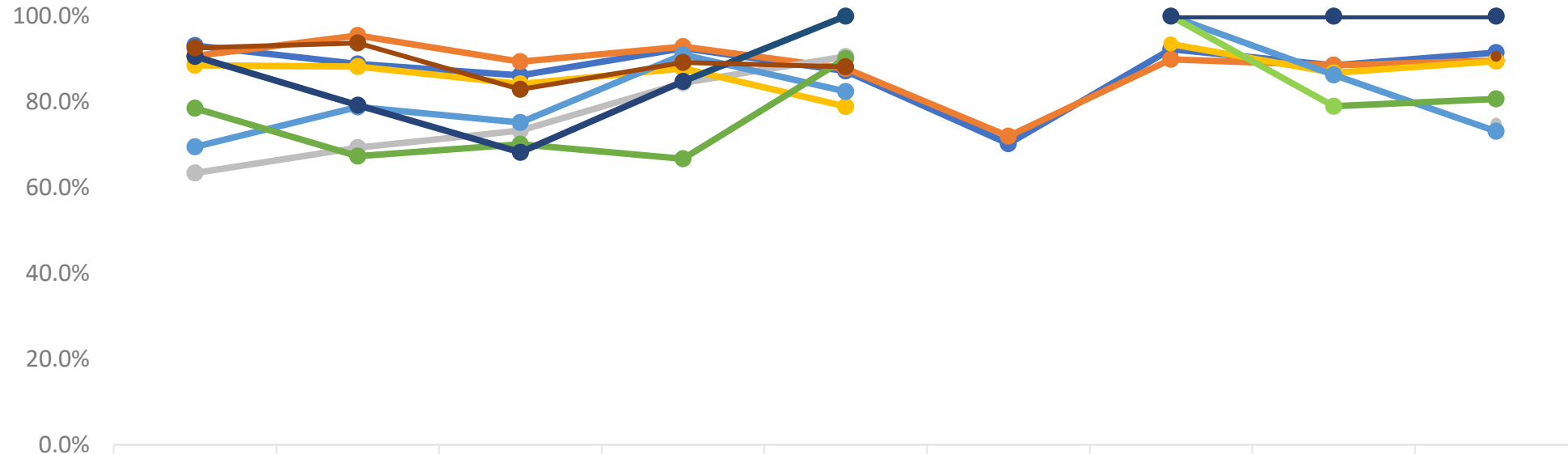


SATISFACTION - KAUA'I

- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only Kaua'i were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Age:** Visitors from **U.S. West** between the ages of 35-49 years old gave the highest satisfaction scores amongst the different age groups from this visitor market.
- **Education:** Visitors from **U.S. East** without a college degree were more satisfied with their stay than those with a college degree.

SATISFACTION - KAUA'I

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



| | Q1 2016 | Q1 2017 | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 93.1% | 88.8% | 86.2% | 92.5% | 87.2% | 70.2% | 92.3% | 88.5% | 91.5% |
| U.S. East | 90.7% | 95.5% | 89.4% | 92.9% | 87.8% | 72.0% | 89.9% | 88.5% | 89.6% |
| Japan | 63.4% | 69.3% | 73.3% | 84.4% | 90.6% | | | | 75.0% |
| Canada | 88.5% | 88.2% | 84.2% | 87.8% | 78.9% | | 93.5% | 86.8% | 89.5% |
| Oceania | 69.5% | 78.8% | 75.2% | 91.0% | 82.4% | | 100.0% | 86.3% | 73.1% |
| Korea | 78.5% | 67.3% | 70.1% | 66.7% | 90.1% | | 100.0% | 79.0% | 80.7% |
| China | 90.6% | 79.2% | 68.2% | 84.8% | 100.0% | | 100.0% | 100.0% | 100.0% |
| Europe | 92.6% | 93.7% | 82.9% | 89.2% | 88.1% | | | | 90.6% |

P= Preliminary Data

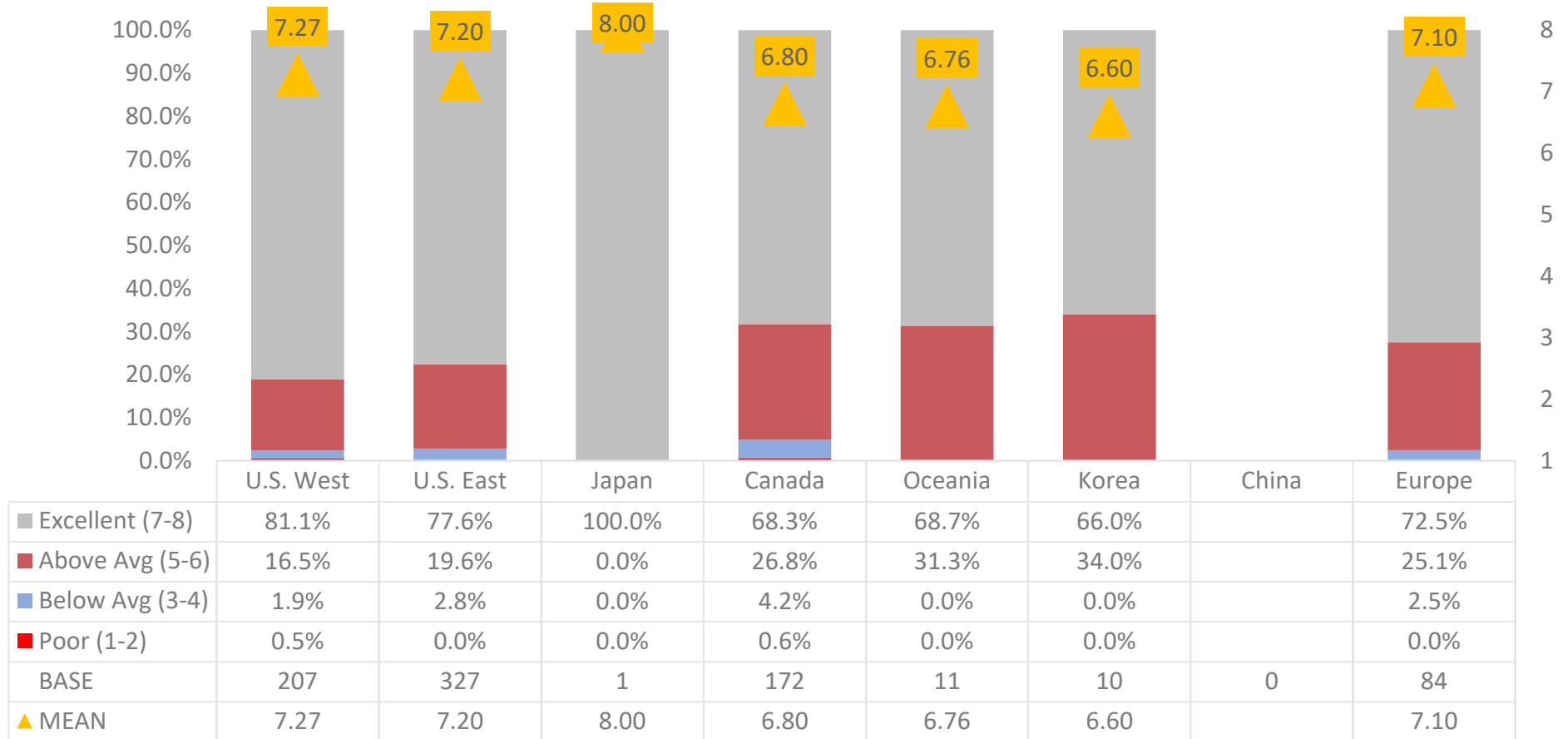
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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



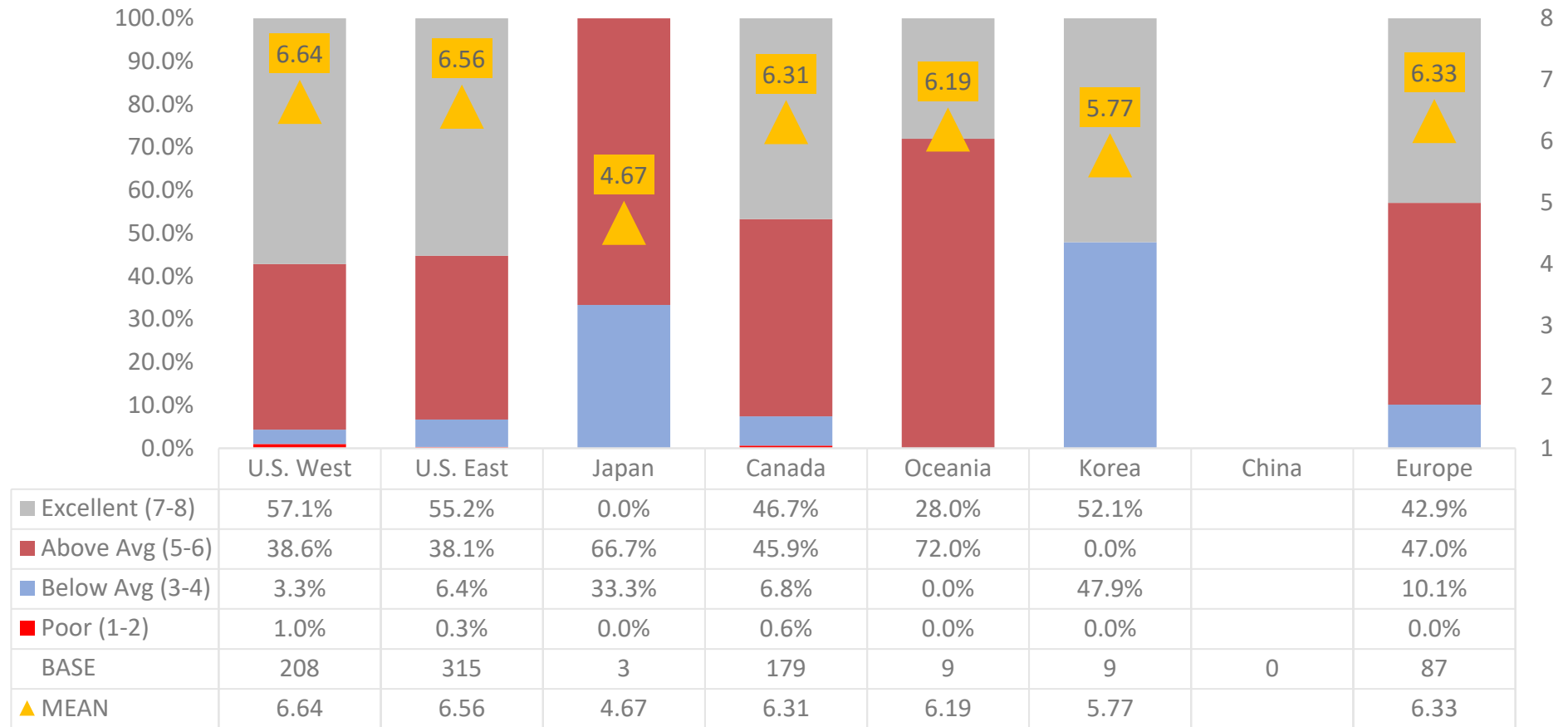
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



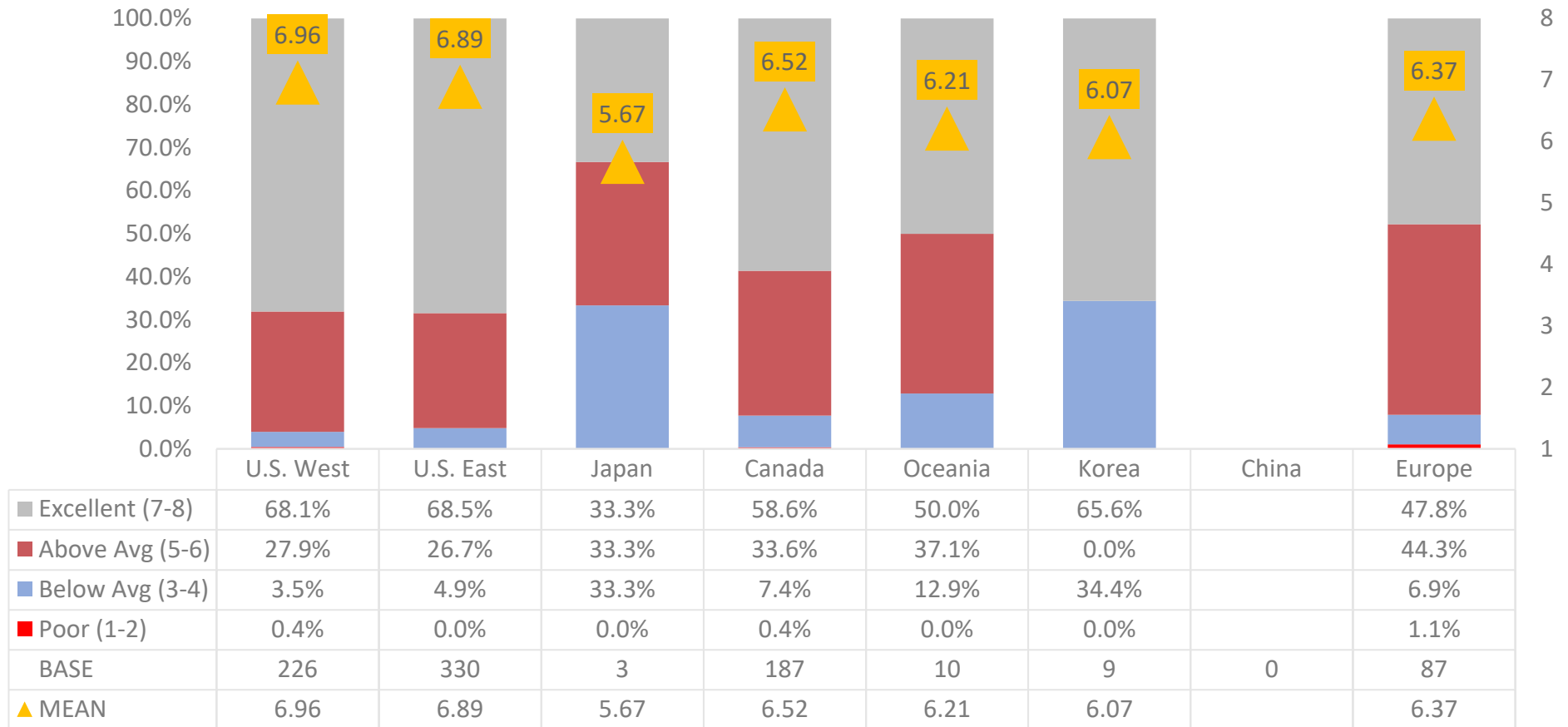
SHOPPING - KAUA'I

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



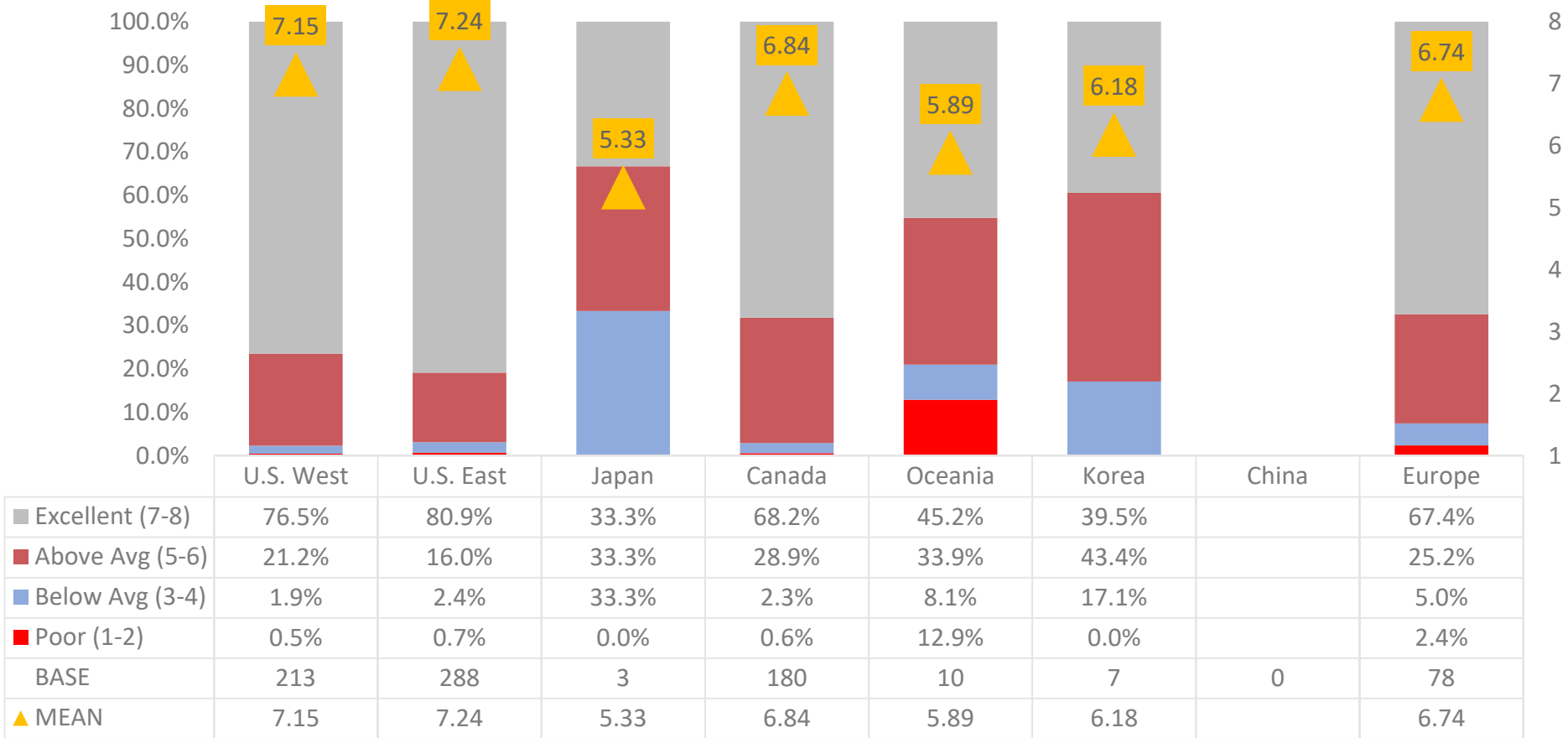
DINING/ FOOD & BEVERAGE - KAUA'I

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



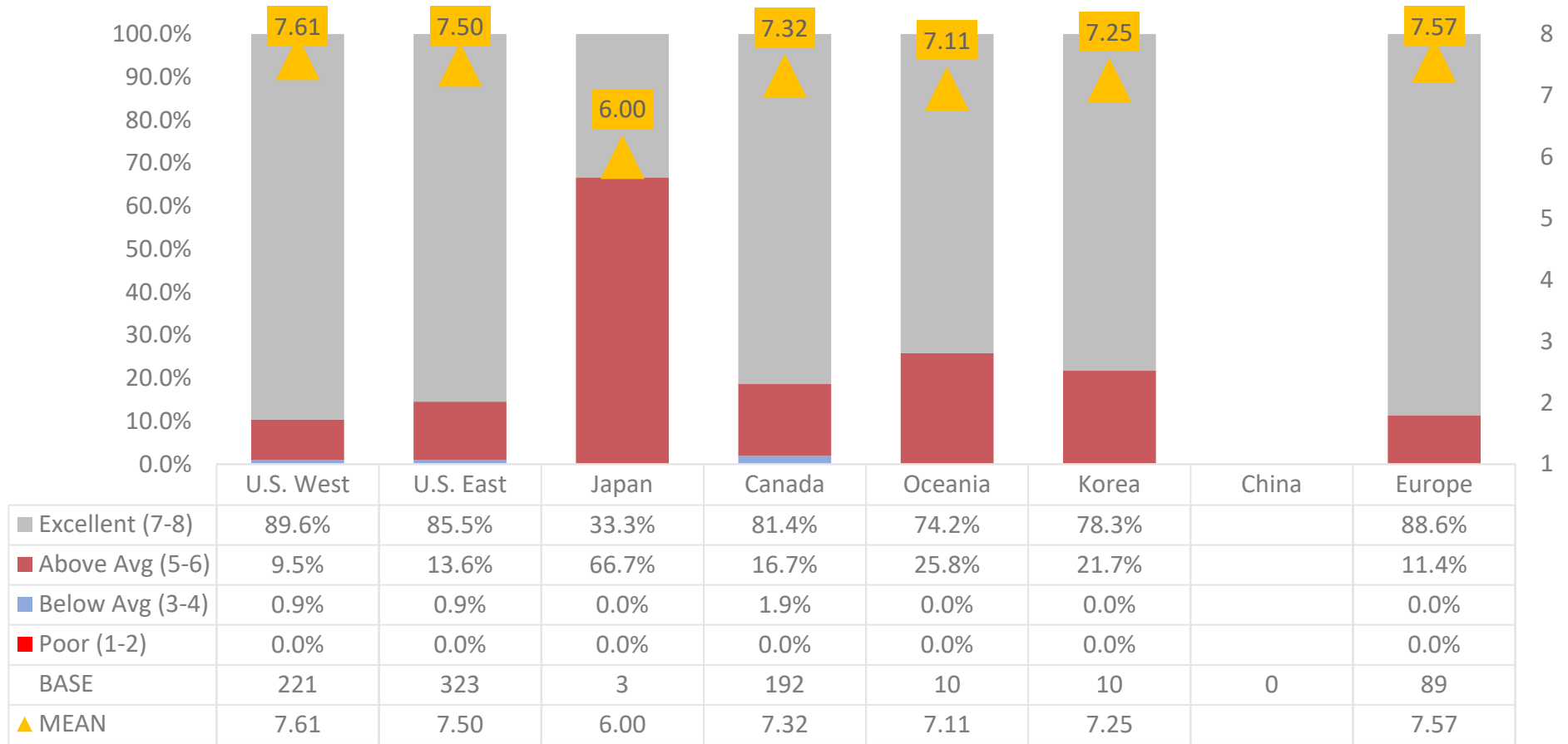
LODGING/ ACCOMMODATIONS - KAUA'I

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



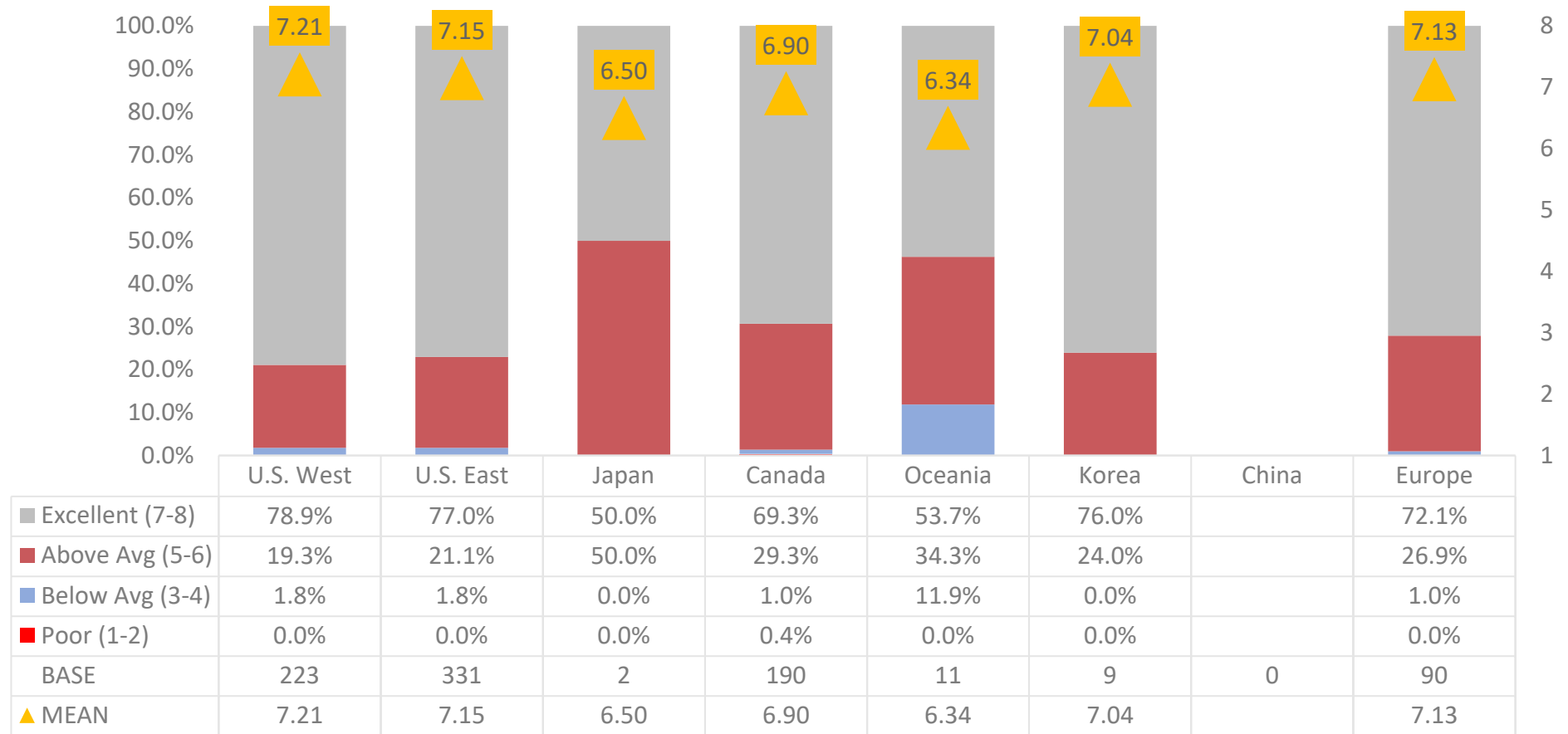
BEACHES - KAUA'I

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



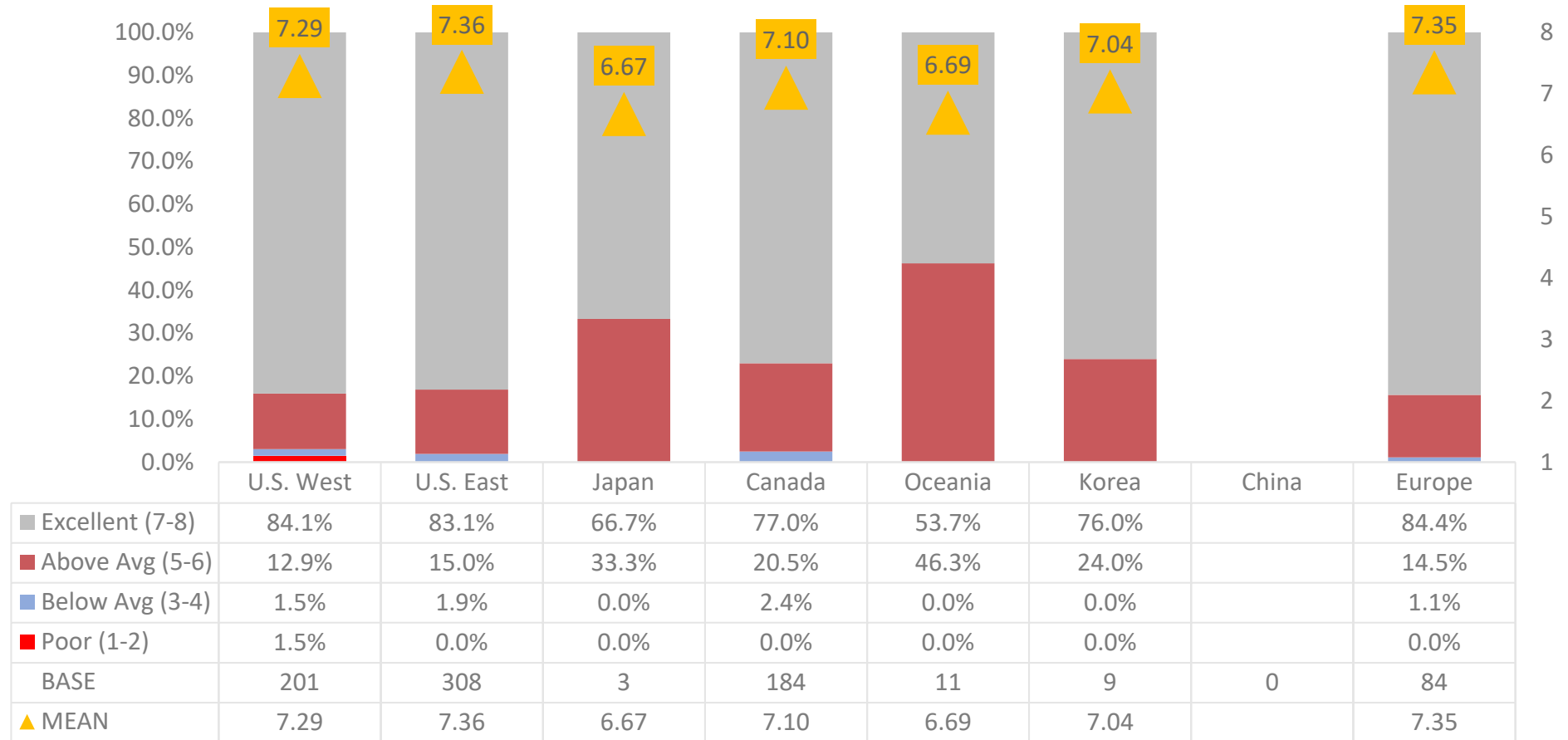
PUBLIC AREAS - KAUA'I

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



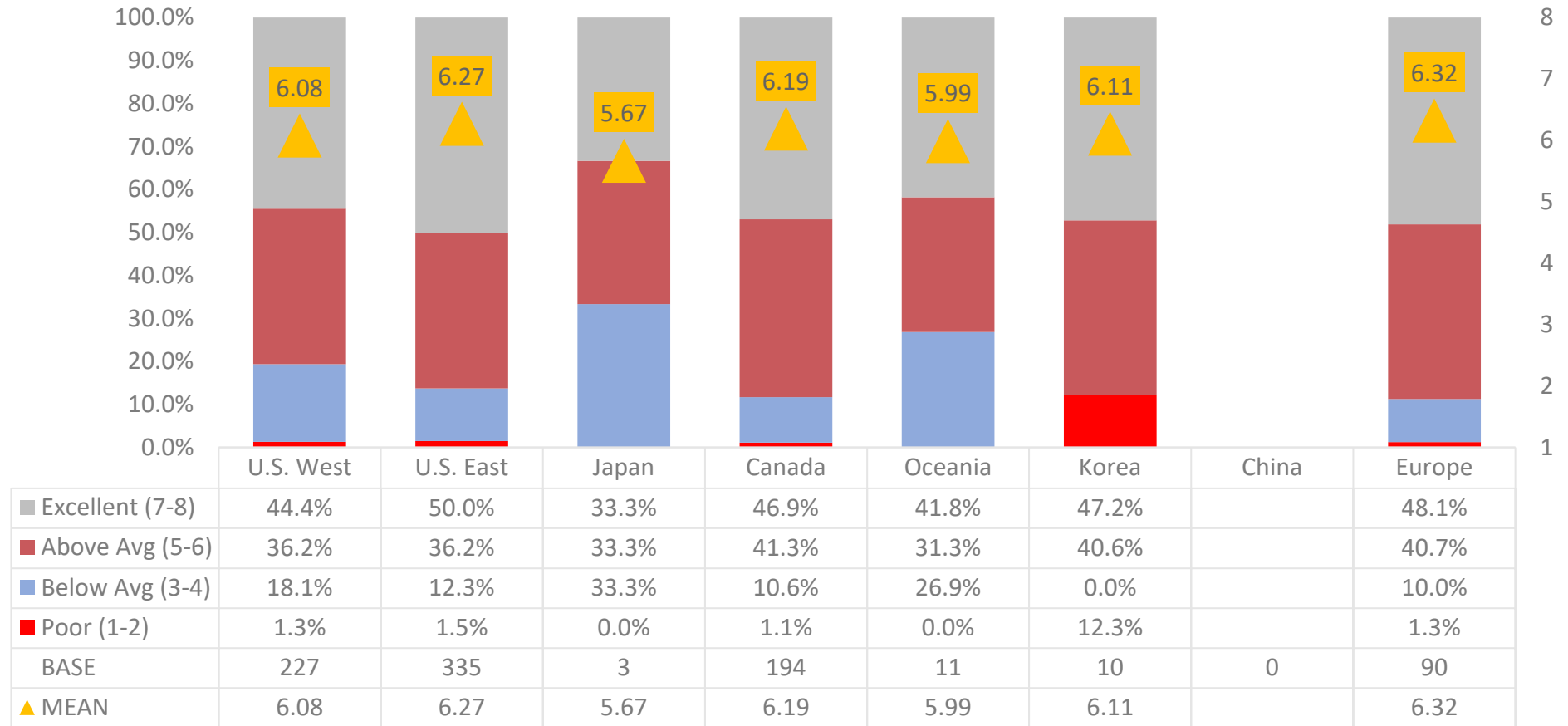
PARKS - KAUA'I

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



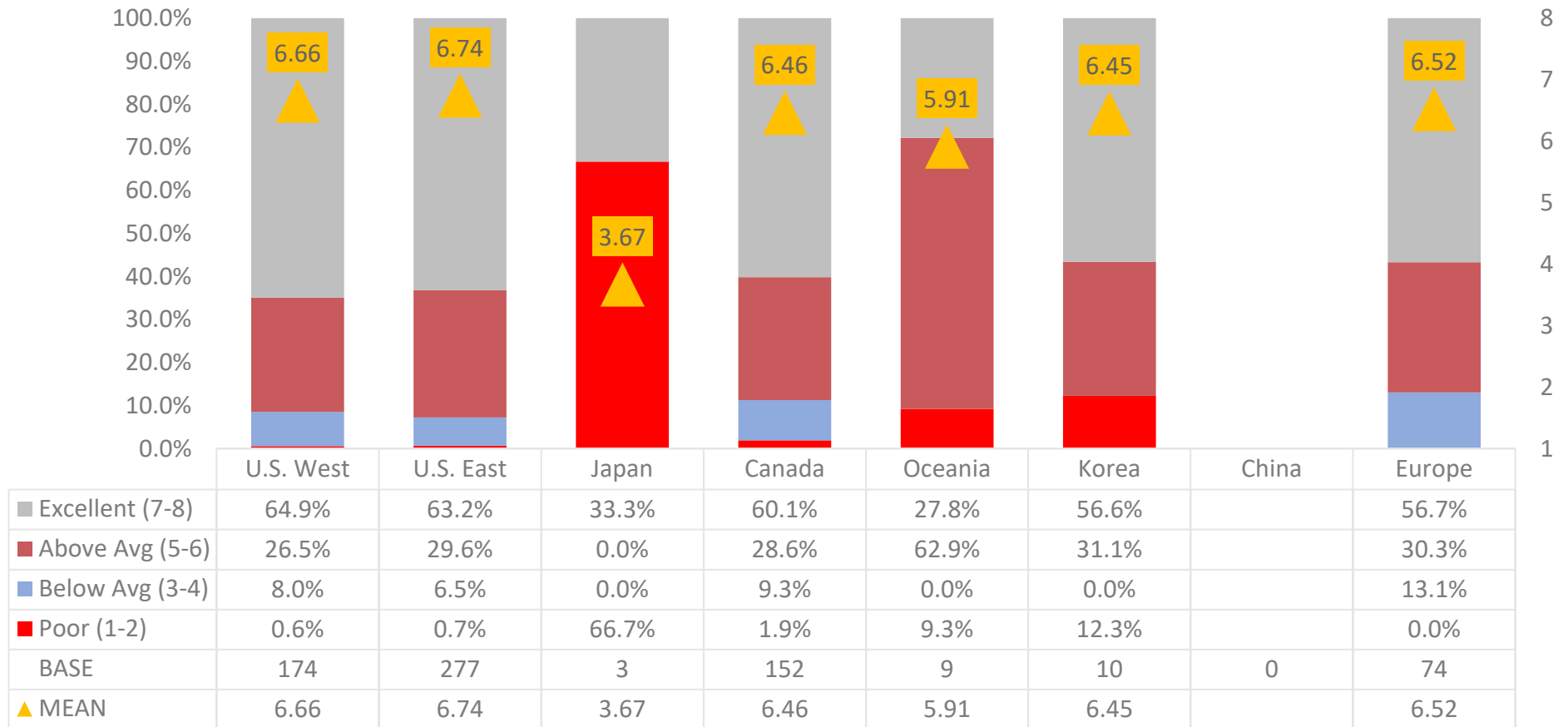
ROADS - KAUA'I

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



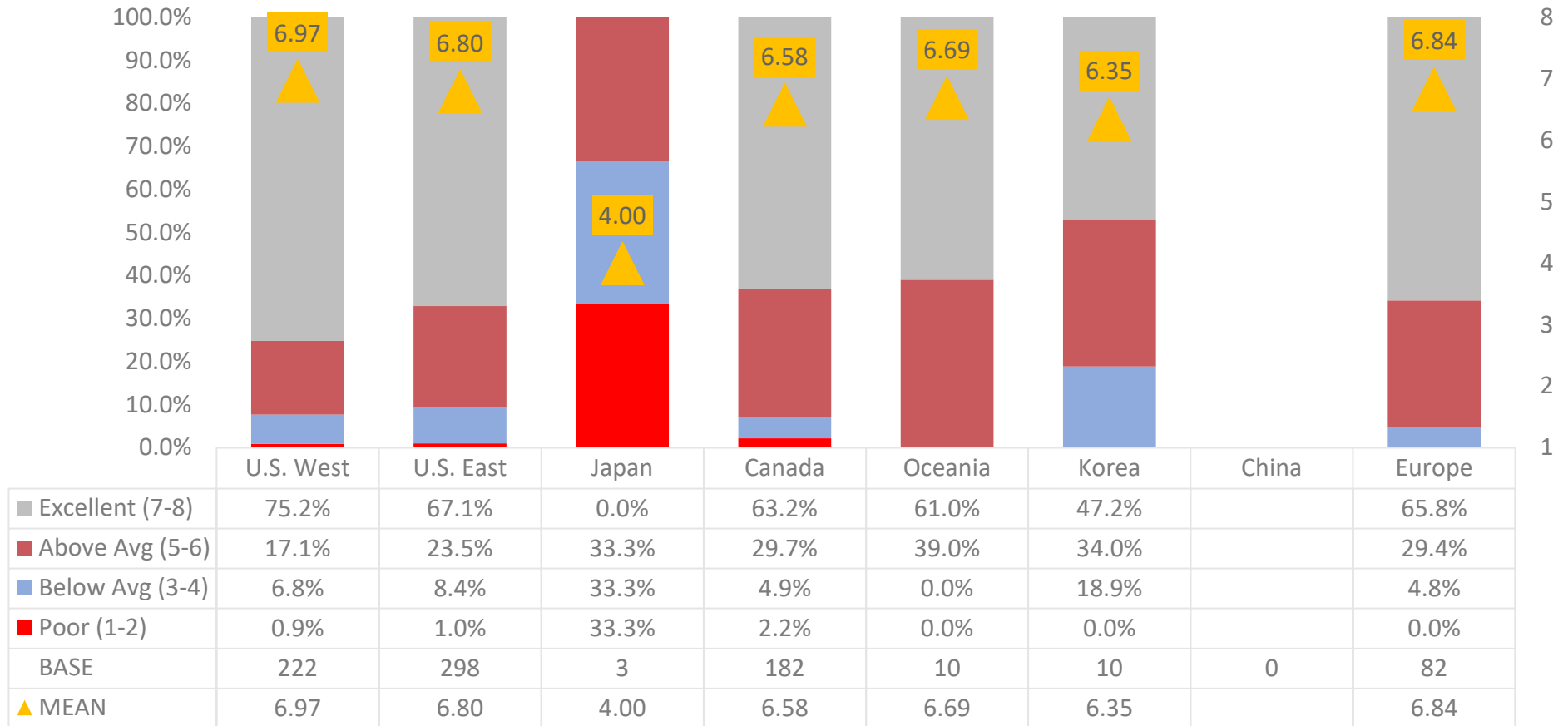
TRANSPORTATION ON ISLAND - KAUA'I

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



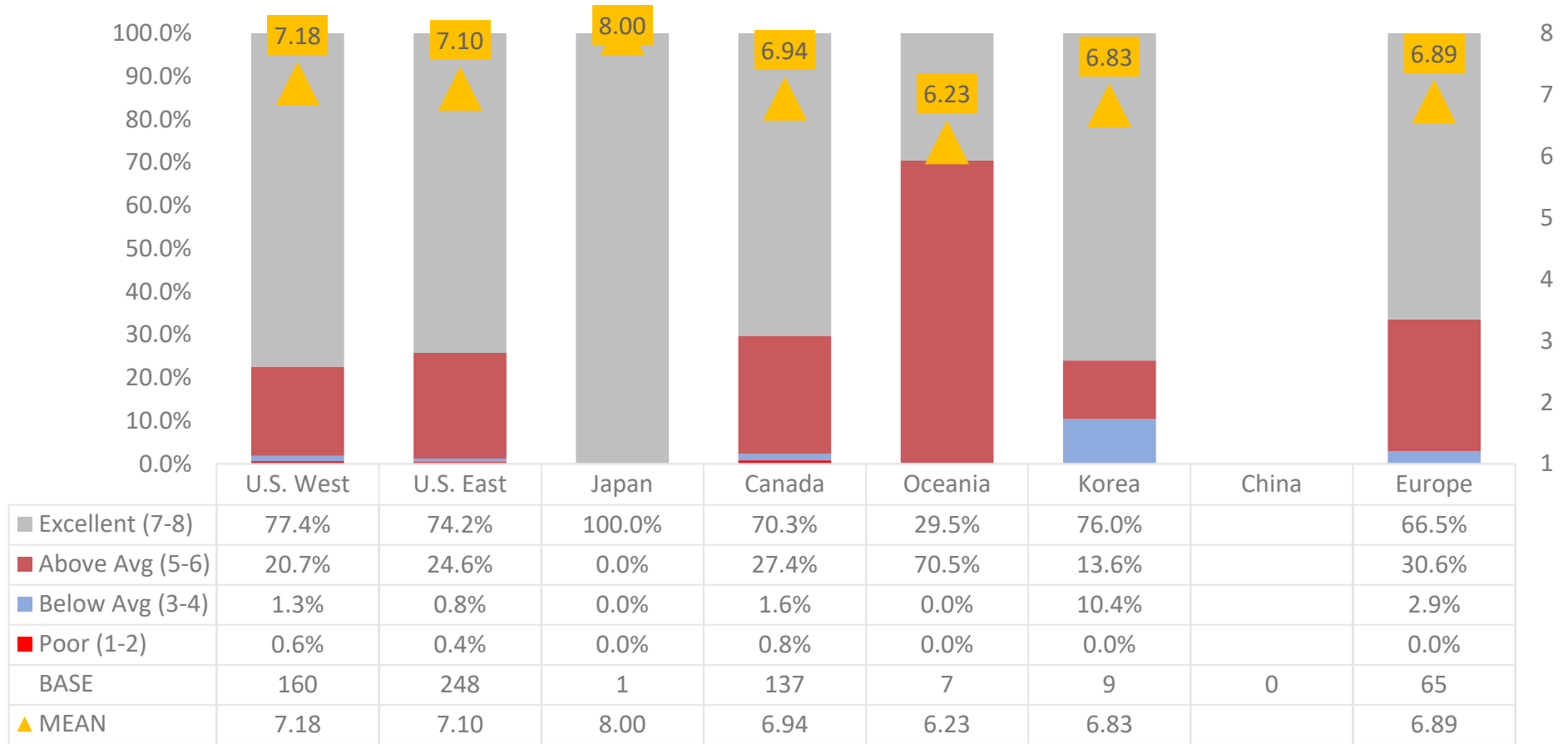
AIRPORT- KAUA'I

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



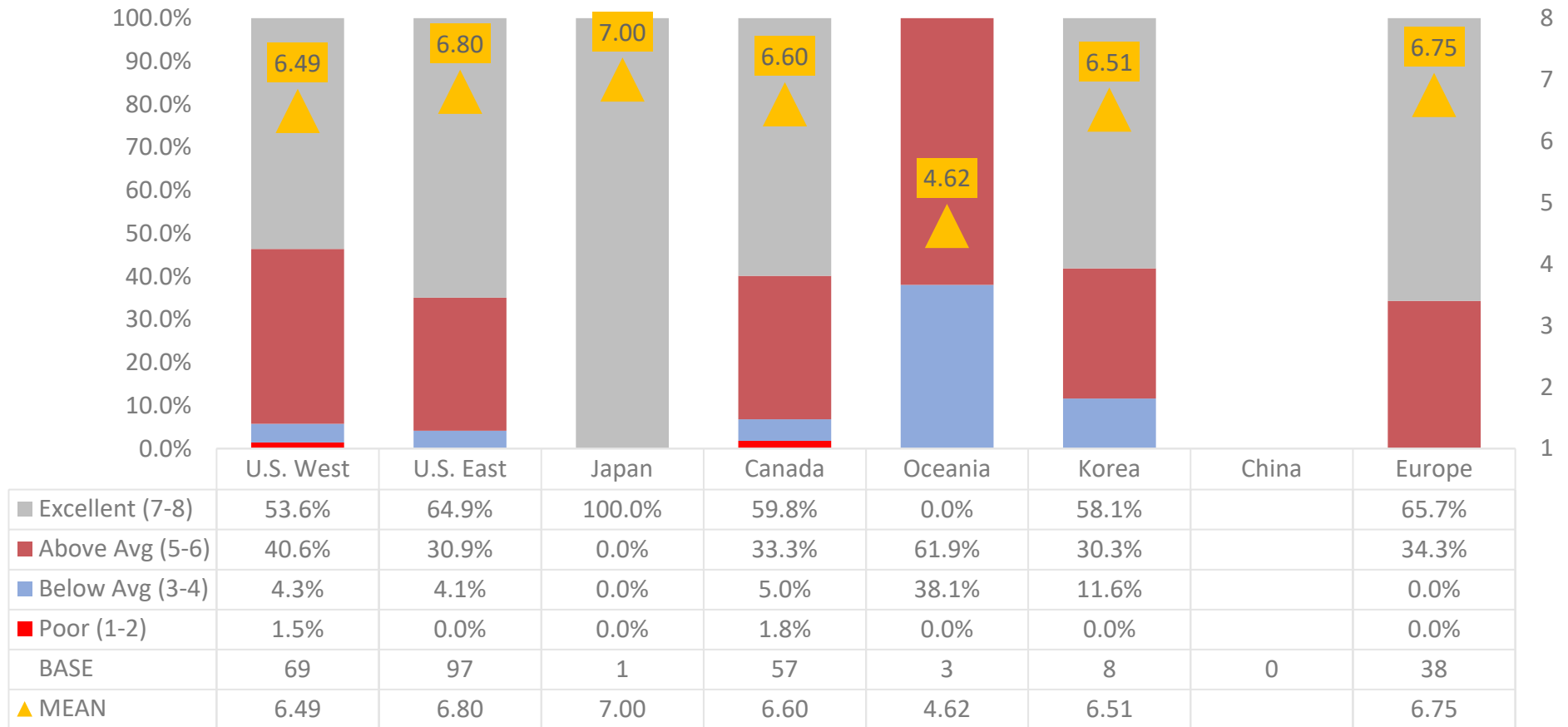
CULTURAL ACTIVITIES - KAUA'I

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



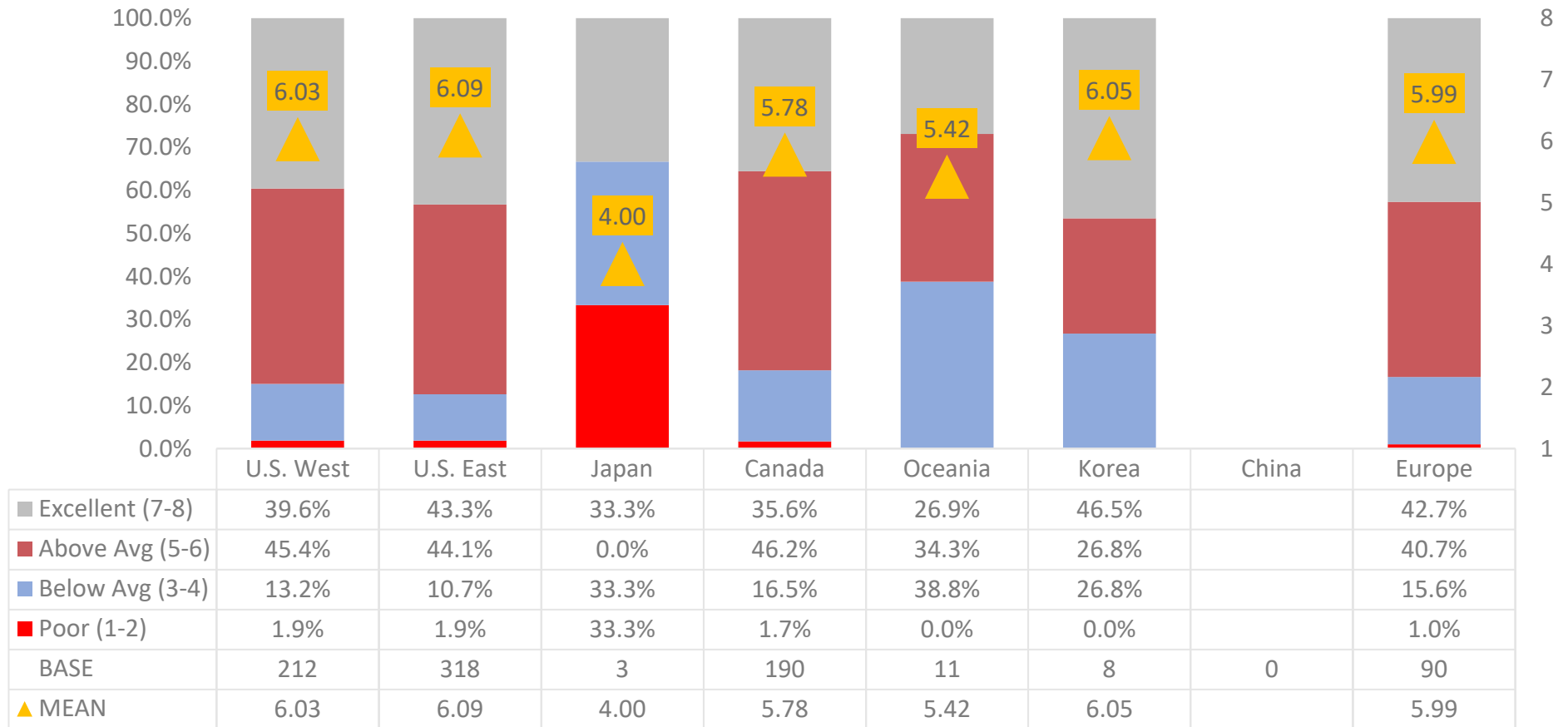
VOLUNTEER ACTIVITIES - KAUA'I

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



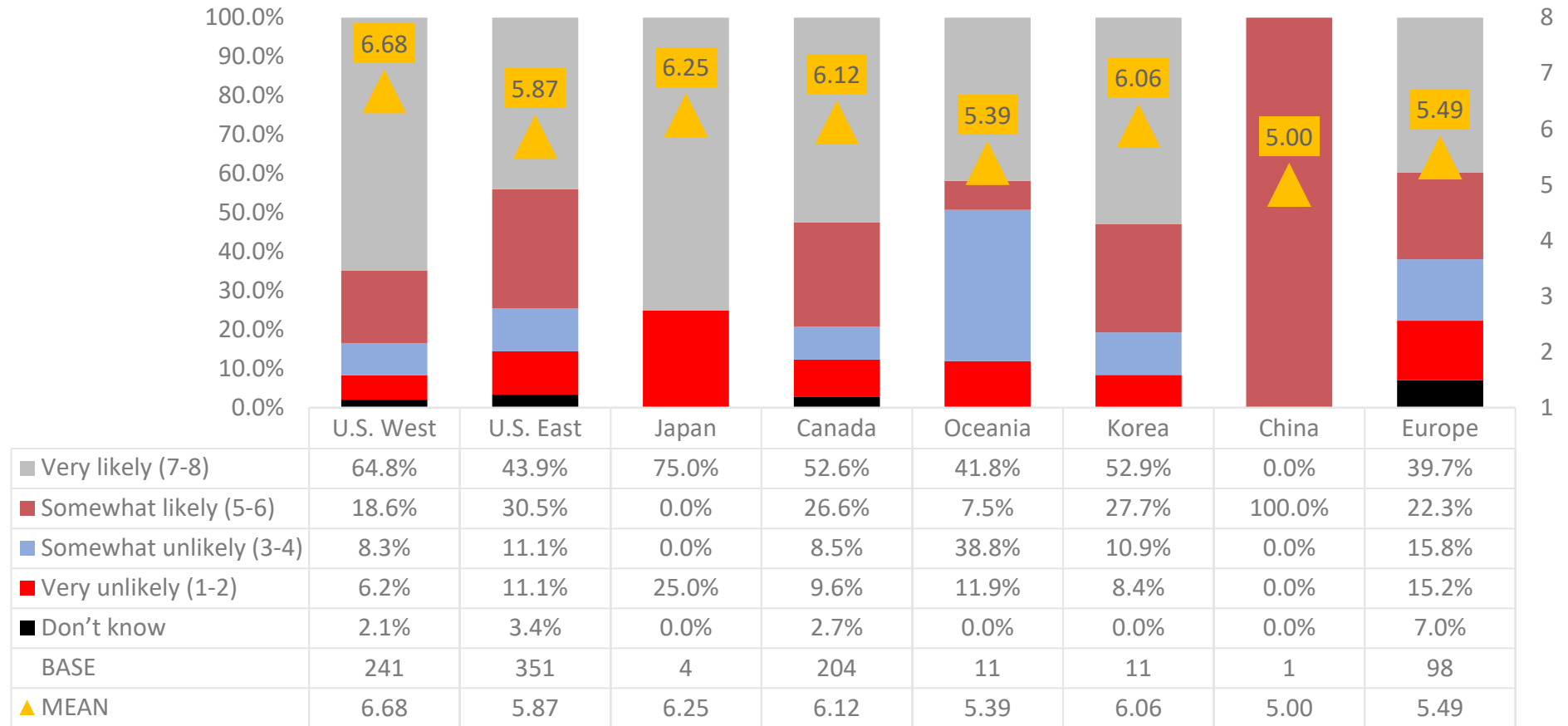
VALUE FOR THE MONEY- KAUA'I

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



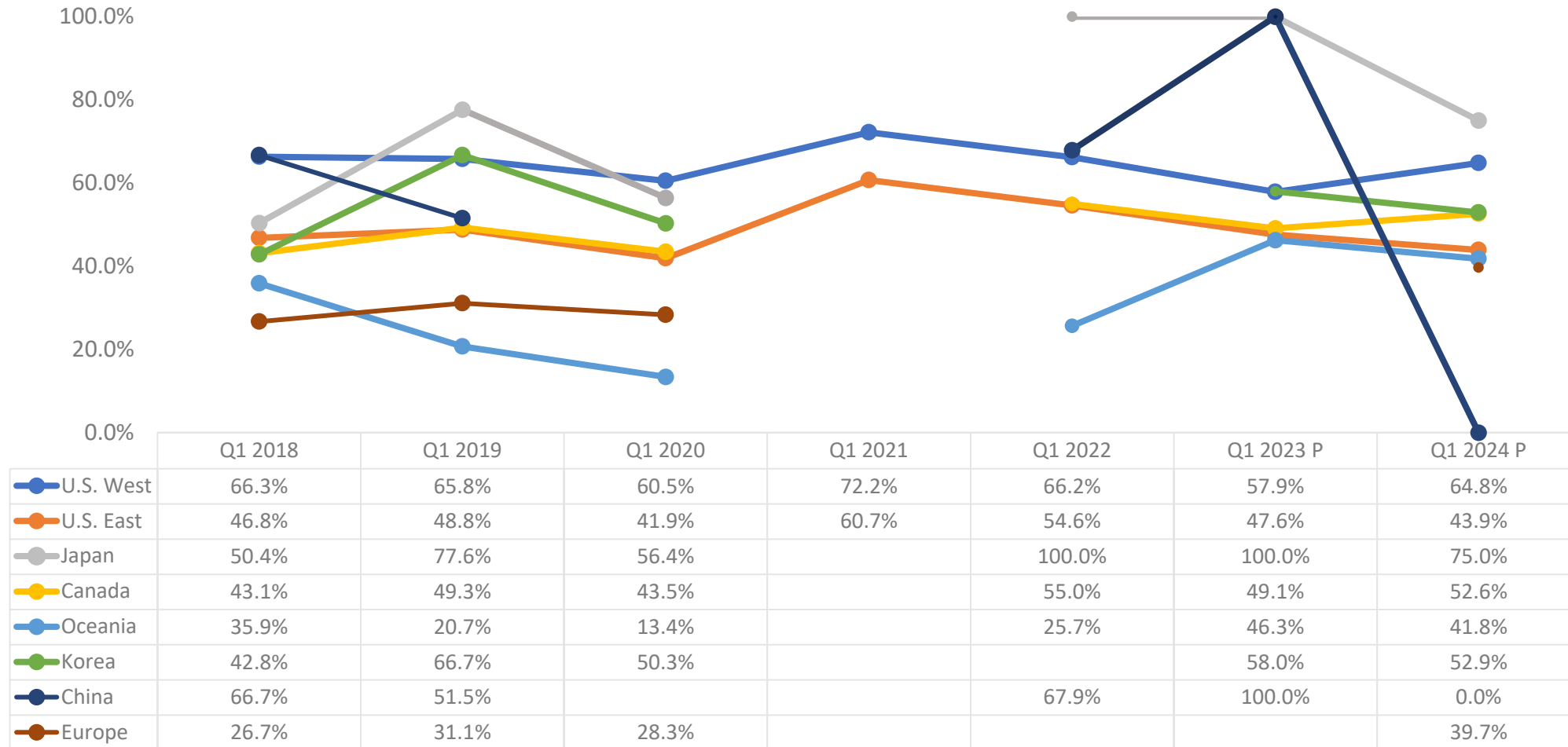
LIKELIHOOD OF RETURN VISIT - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

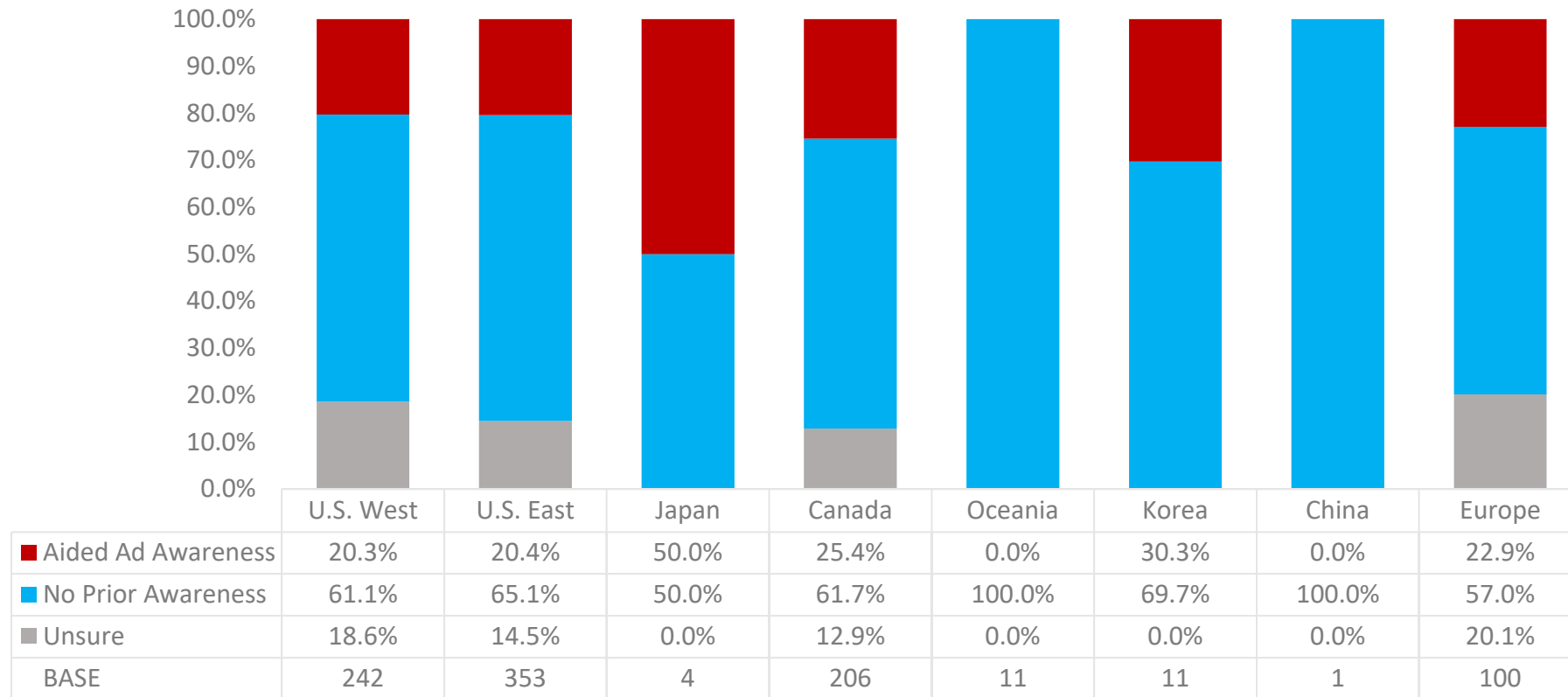


P= Preliminary Data

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

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

AIDED ADVERTISING AWARENESS - KAUA'I

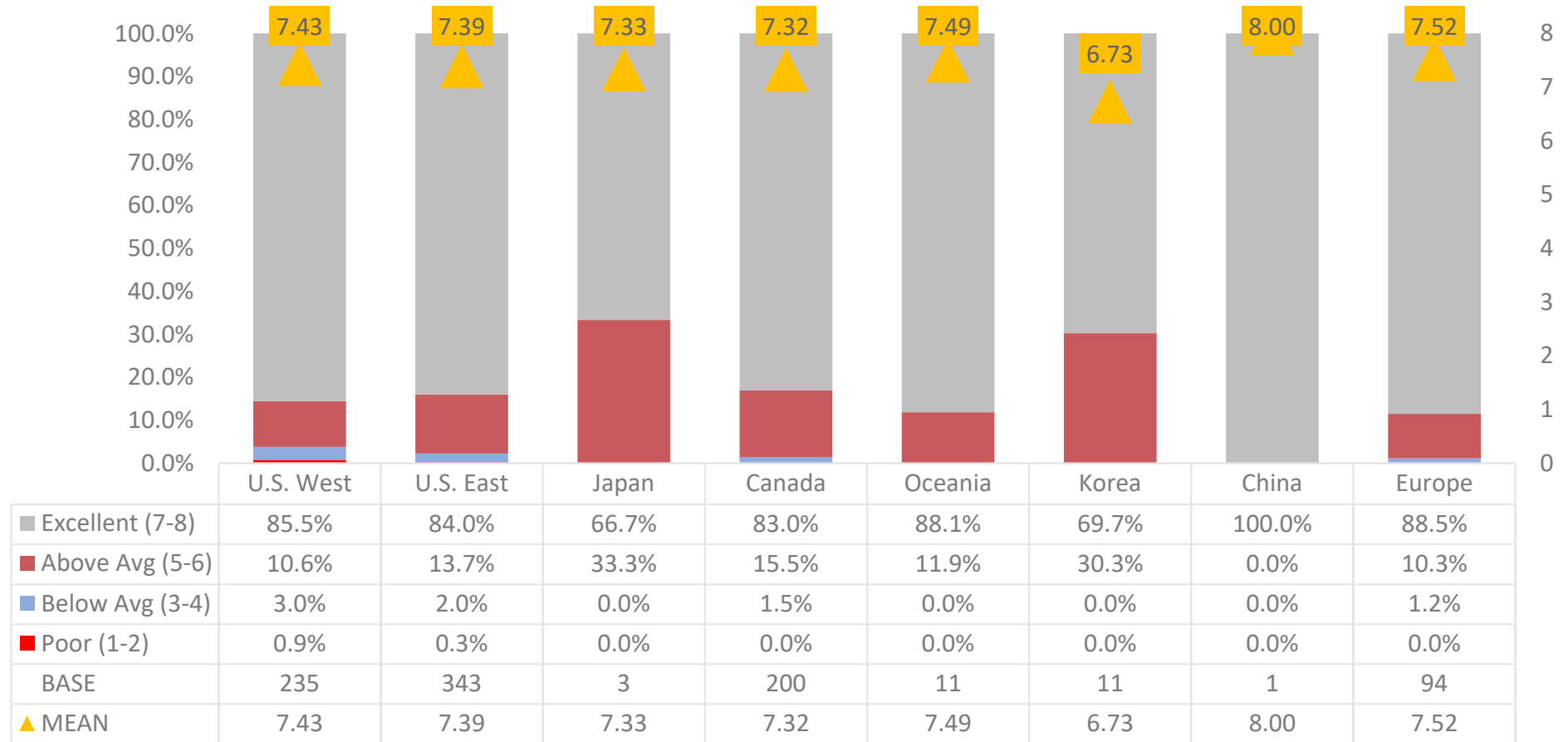


MOTIVATING FACTORS - KAUA'I

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|--------|--------|
| Famous landmarks or imagery/ natural beauty | 42.1% | 47.6% | 25.0% | 47.7% | 53.7% | 41.2% | 100.0% | 57.9% |
| Hawaiian cultural events | 5.0% | 6.5% | 0.0% | 3.0% | 0.0% | 0.0% | 0.0% | 2.2% |
| Outdoor or sporting activities and events | 11.5% | 16.7% | 25.0% | 17.0% | 7.5% | 0.0% | 0.0% | 11.4% |
| Social media posts and videos | 6.6% | 7.6% | 0.0% | 10.6% | 0.0% | 19.3% | 0.0% | 16.6% |
| Hawaiian music | 4.6% | 2.0% | 0.0% | 3.0% | 0.0% | 0.0% | 0.0% | 4.1% |
| Television programs or movies filmed in Hawai'i | 2.5% | 5.7% | 0.0% | 6.6% | 0.0% | 36.1% | 0.0% | 14.2% |
| BASE | 242 | 353 | 4 | 206 | 11 | 11 | 1 | 100 |

FRIENDLINESS OF KAUA‘I RESIDENTS

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



TOP TRIP INFLUENCERS - KAUA'I

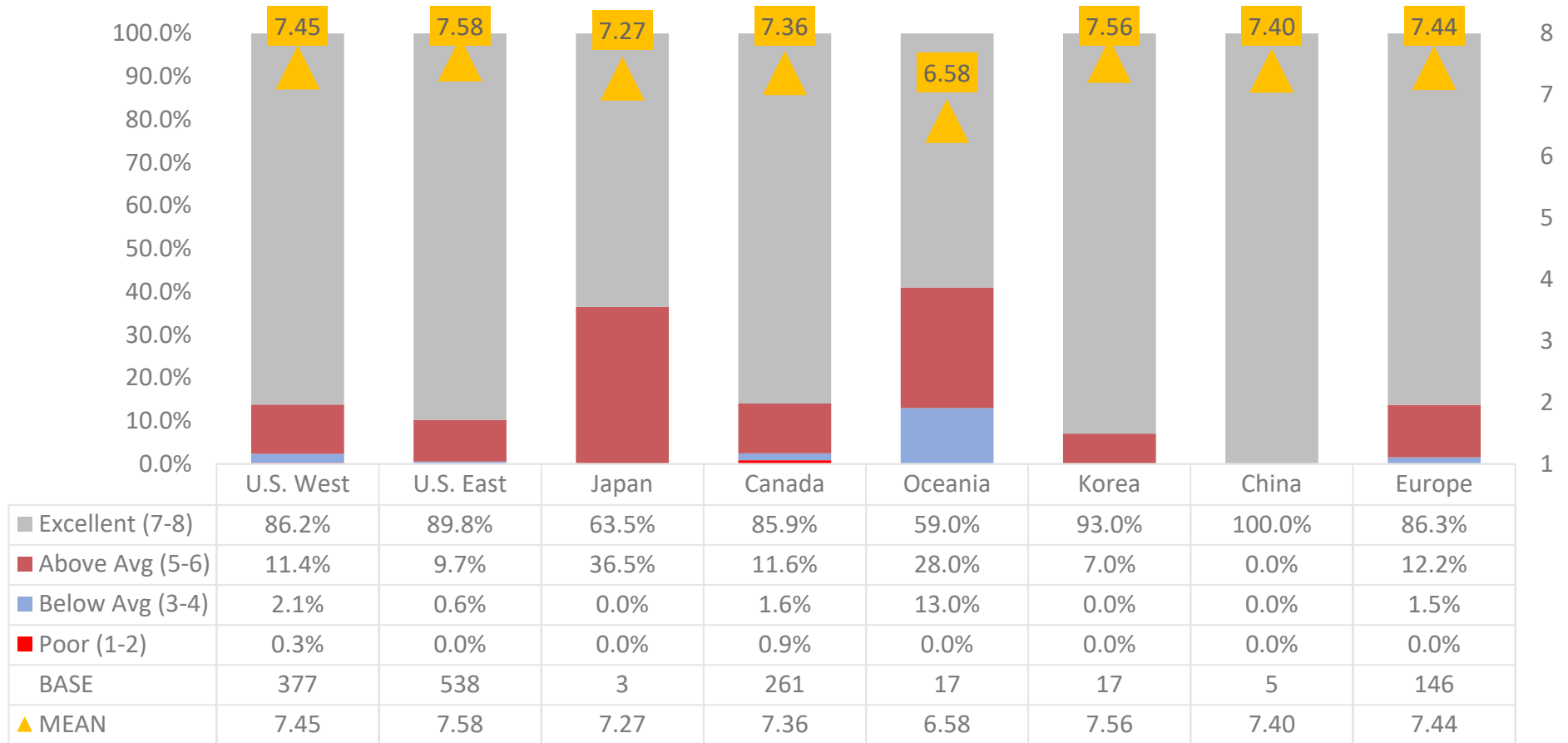
| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China* | Europe |
|---|-----------|-----------|-------|--------|---------|-------|--------|--------|
| Been here before | 51.5% | 31.6% | 33.3% | 37.9% | 14.9% | 10.9% | 0.0% | 17.4% |
| Friend recommendation | 21.1% | 27.8% | 66.7% | 30.8% | 43.3% | 47.1% | 0.0% | 25.7% |
| Cruise line stop/part of tour | 1.7% | 14.3% | 0.0% | 7.0% | 0.0% | 0.0% | 0.0% | 13.0% |
| Visiting Family/ Friends | 5.6% | 3.0% | 0.0% | 3.9% | 0.0% | 8.4% | 0.0% | 3.5% |
| Location/ Never been, but went to other islands | 2.2% | 3.3% | 0.0% | 3.9% | 7.5% | 0.0% | 0.0% | 1.2% |
| Attending Conference/ Event | 1.7% | 4.1% | 0.0% | 2.9% | 0.0% | 0.0% | 0.0% | 1.0% |
| Own a timeshare | 2.6% | 2.1% | 0.0% | 1.7% | 0.0% | 0.0% | 0.0% | 1.2% |
| Social Media Post | 2.6% | 1.5% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 5.1% |
| Article/ Blog | 0.9% | 3.2% | 0.0% | 3.0% | 14.9% | 0.0% | 0.0% | 9.2% |
| Package price/ affordability / cost | 2.6% | 0.6% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% |
| Travel Agent | 1.3% | 2.0% | 0.0% | 0.0% | 0.0% | 33.6% | 0.0% | 8.4% |
| Nature/ Beauty/ Scenery | 0.9% | 2.1% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 6.4% |

* No responses from Chinese visitors

Section 7 – Maui

SATISFACTION - MAUI

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

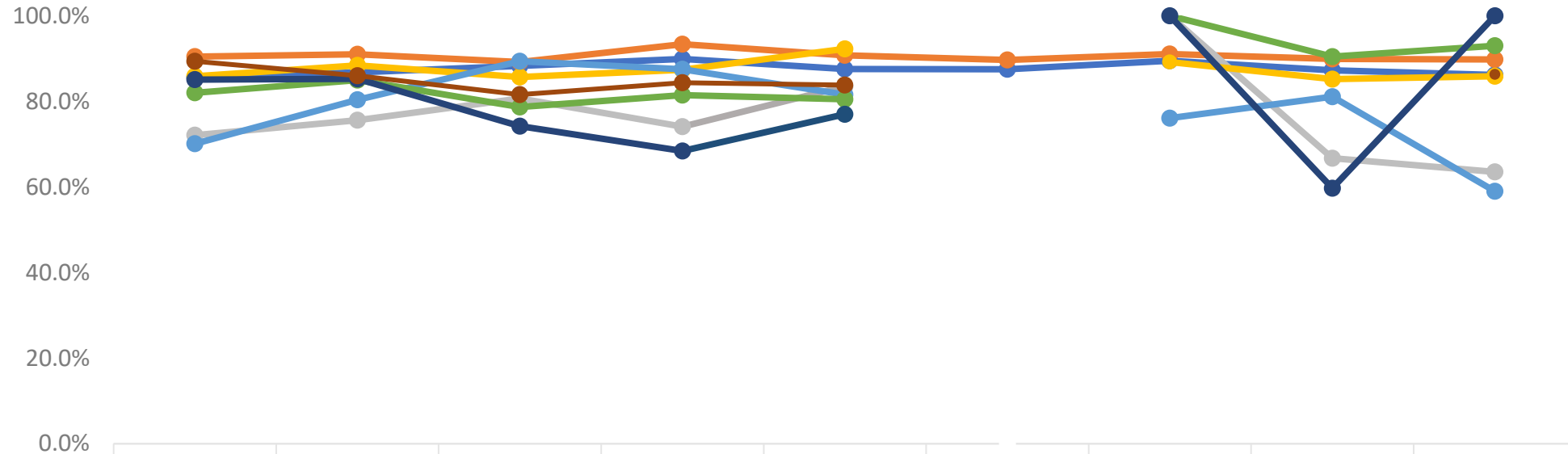


SATISFACTION - MAUI

- **Gender:** Females from **U.S. West** gave higher satisfaction scores than males.
- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only Maui were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Age:** Visitors from **U.S. West** under the age of 50 years old gave higher satisfaction scores amongst the different age groups from this visitor market.
- **Education:** Visitors from **U.S. West** without a college degree were more satisfied with their stay than those with a college degree.

SATISFACTION - MAUI

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



| | Q1 2016 | Q1 2017 | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 85.6% | 86.8% | 88.3% | 89.9% | 87.6% | 87.5% | 89.5% | 87.3% | 86.2% |
| U.S. East | 90.5% | 91.0% | 89.2% | 93.4% | 90.8% | 89.7% | 91.1% | 89.9% | 89.8% |
| Japan | 72.1% | 75.6% | 80.7% | 74.1% | 83.5% | | 100.0% | 66.7% | 63.5% |
| Canada | 85.9% | 88.4% | 85.7% | 87.4% | 92.3% | | 89.2% | 85.2% | 85.9% |
| Oceania | 70.1% | 80.4% | 89.4% | 87.5% | 81.6% | | 76.1% | 81.1% | 59.0% |
| Korea | 82.0% | 85.0% | 78.7% | 81.5% | 80.5% | | 100.0% | 90.5% | 93.0% |
| China | 85.1% | 85.3% | 74.2% | 68.4% | 77.0% | | 100.0% | 59.7% | 100.0% |
| Europe | 89.4% | 86.0% | 81.6% | 84.4% | 83.8% | | | | 86.3% |

P= Preliminary Data

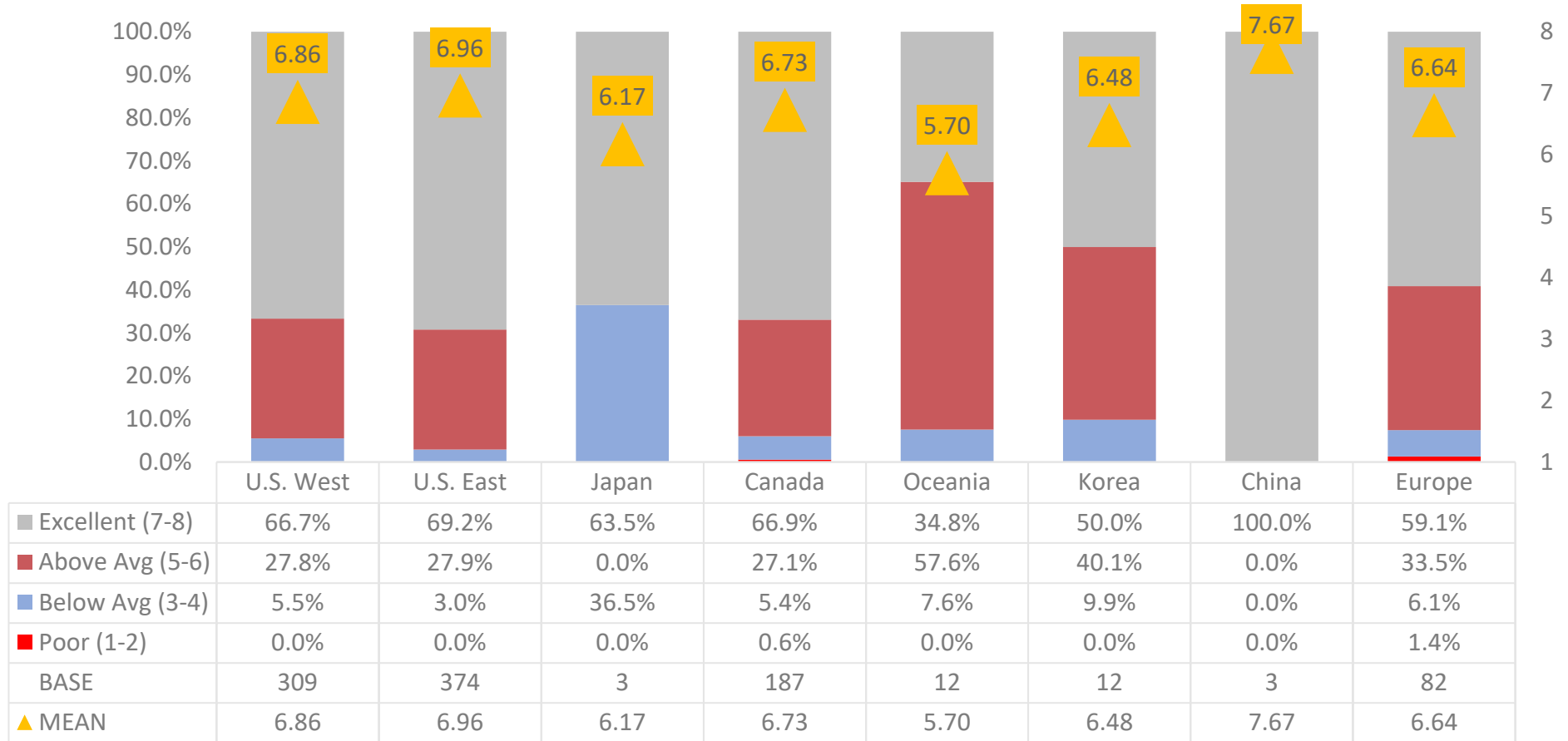
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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



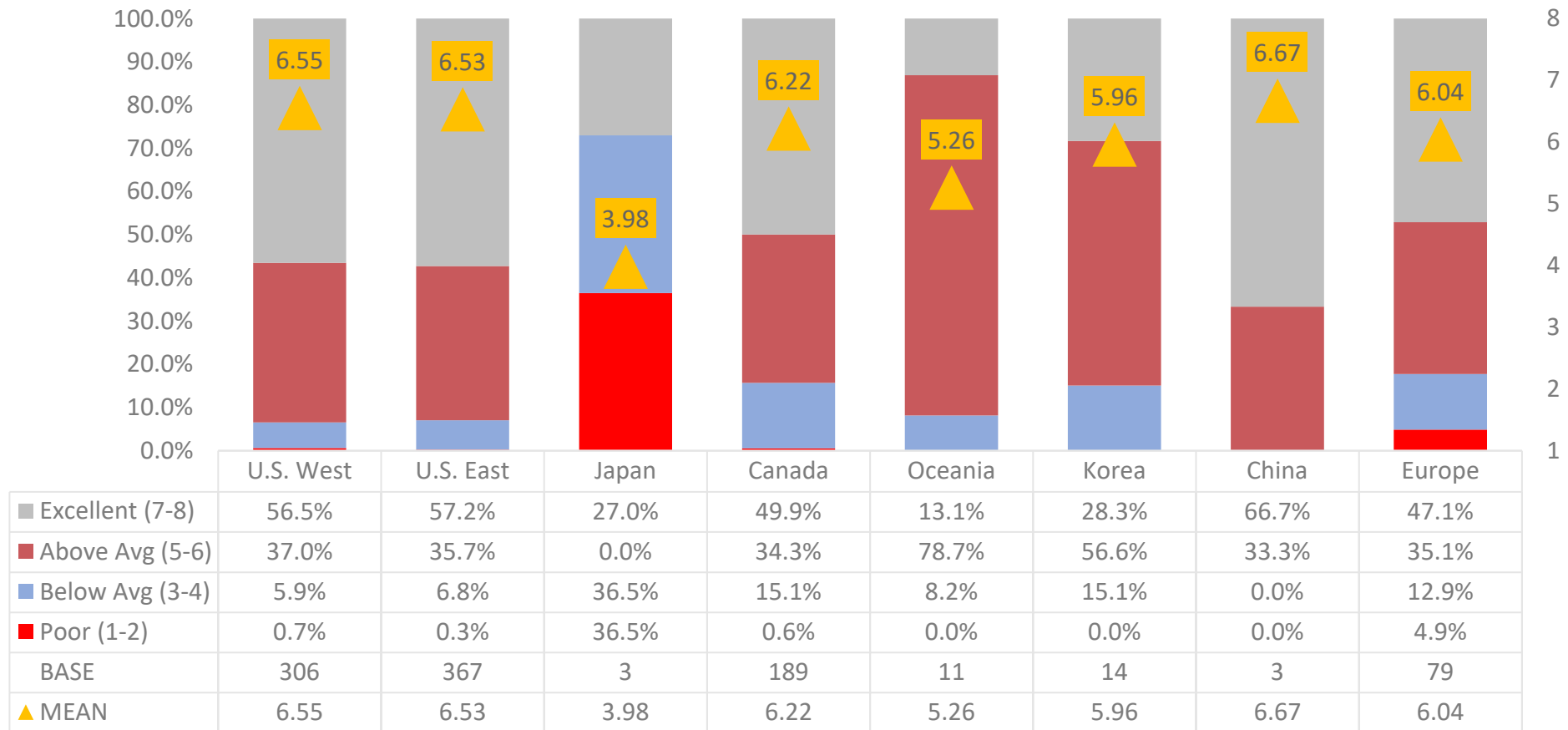
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



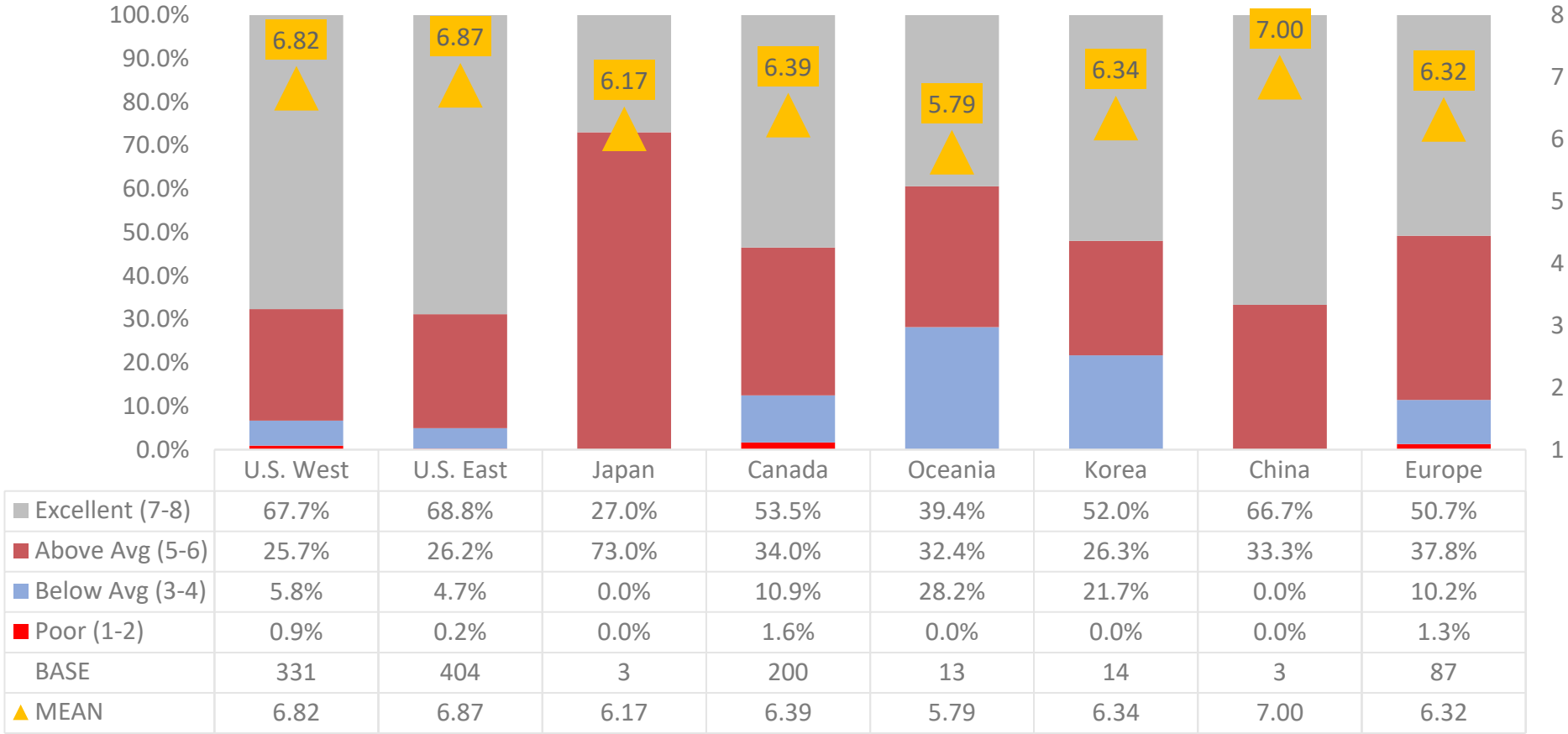
SHOPPING - MAUI

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



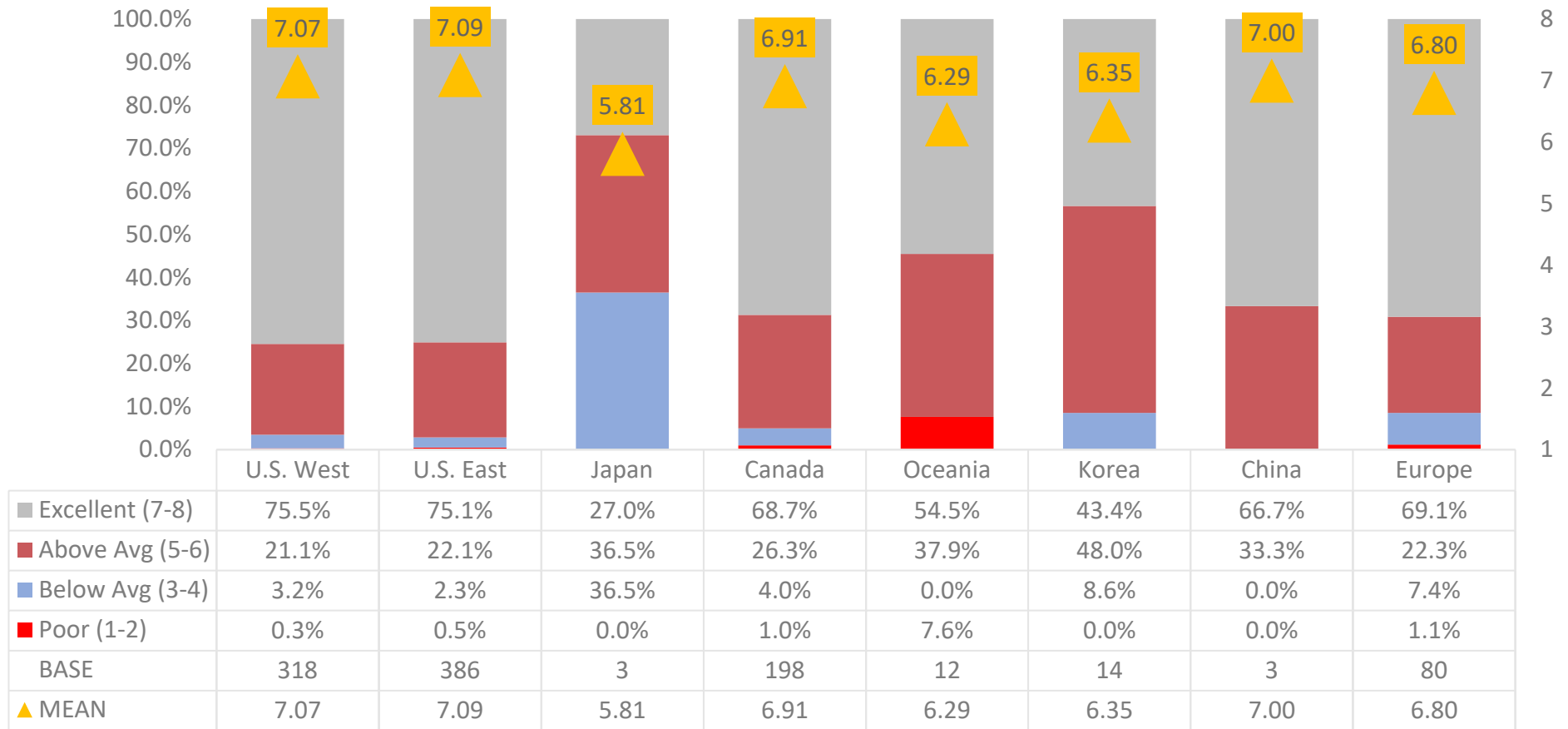
DINING/ FOOD & BEVERAGE - MAUI

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



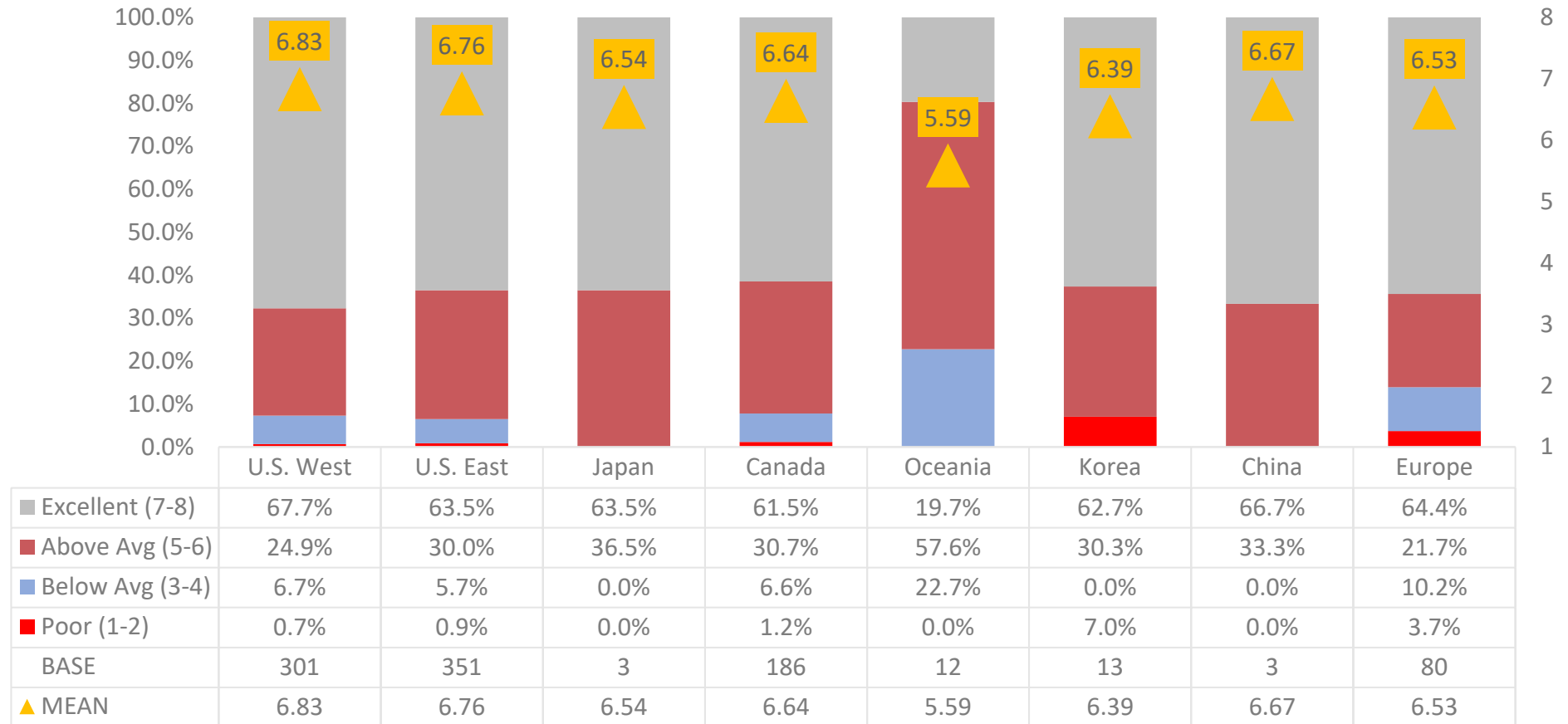
LODGING/ ACCOMMODATIONS - MAUI

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



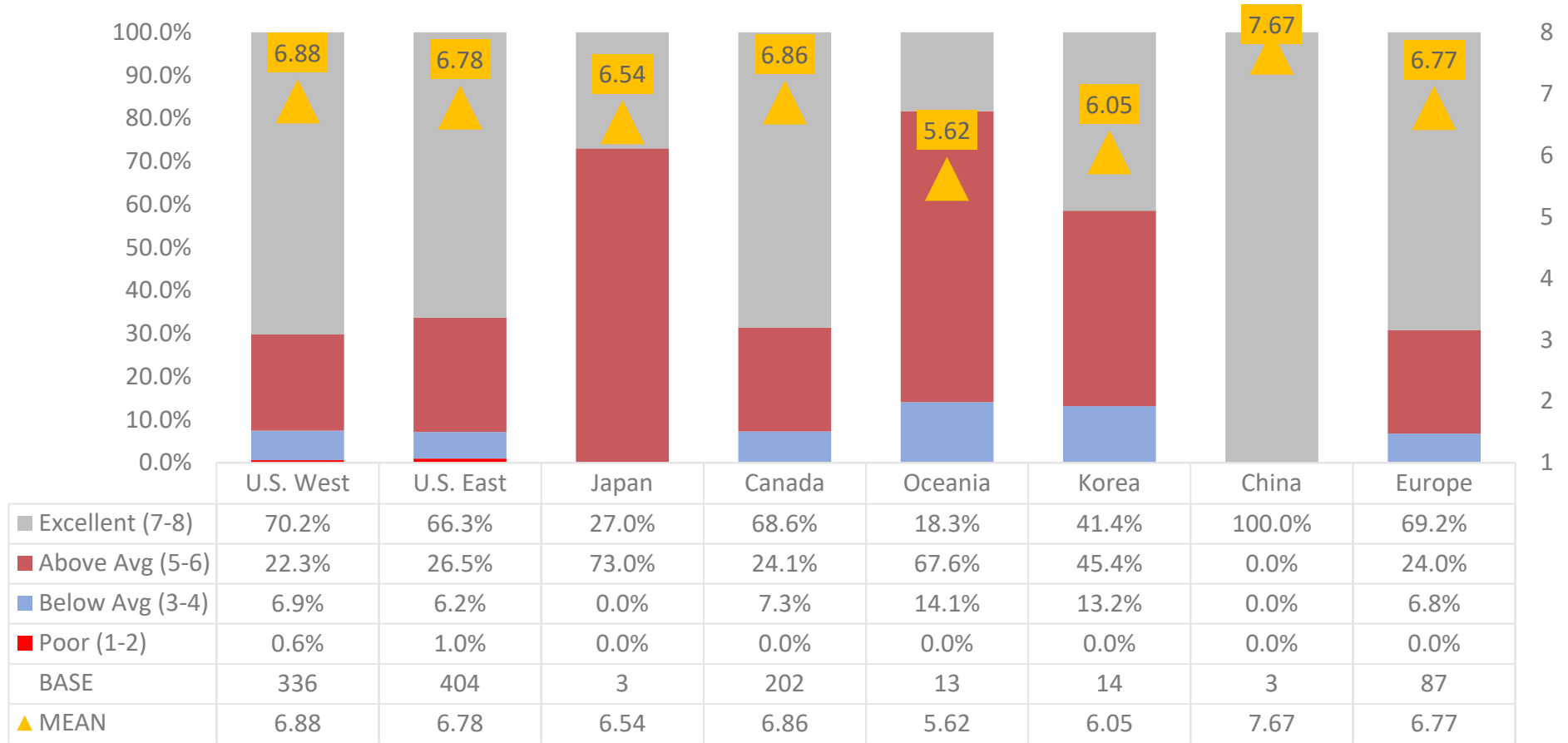
TRANSPORTATION ON ISLAND - MAUI

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



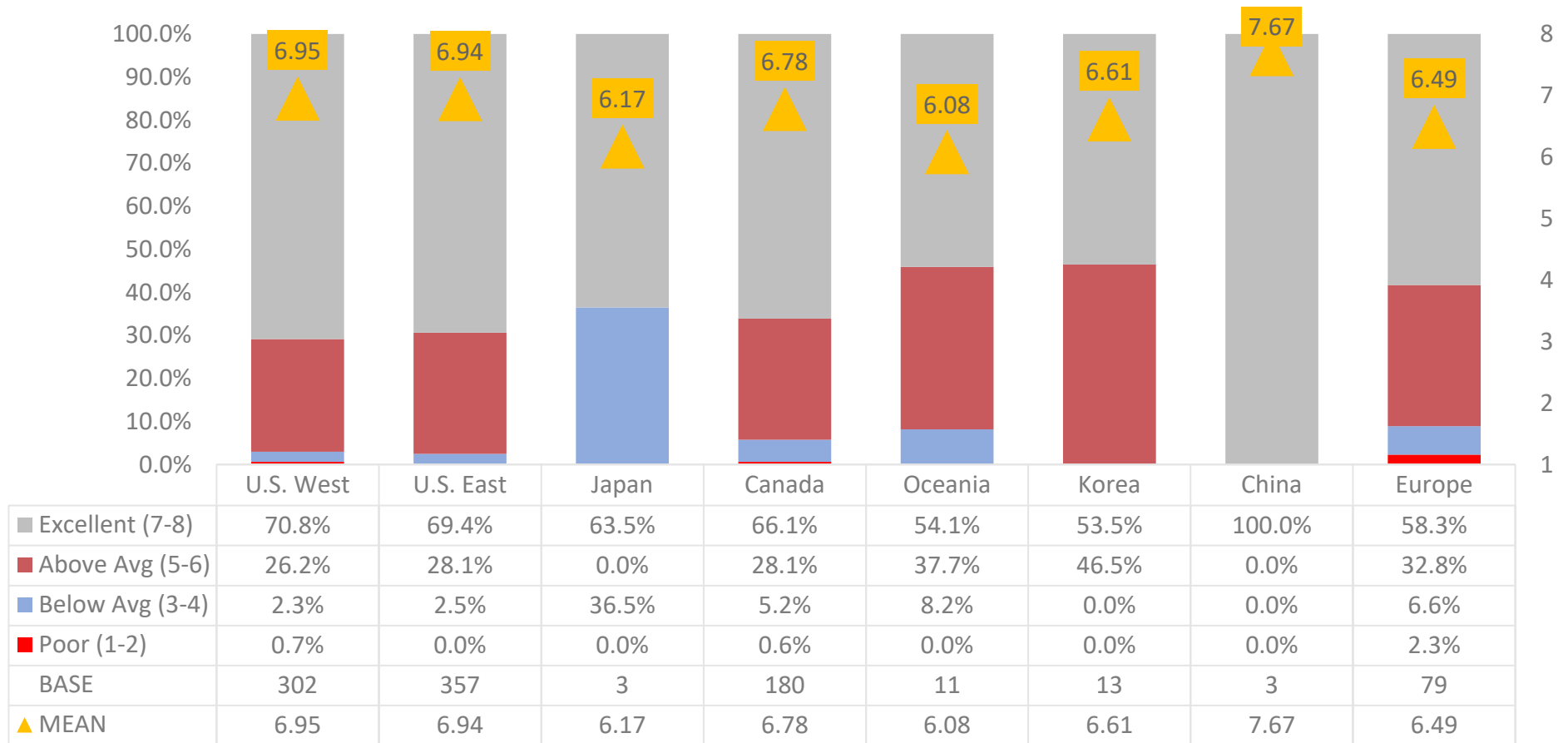
AIRPORT - MAUI

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



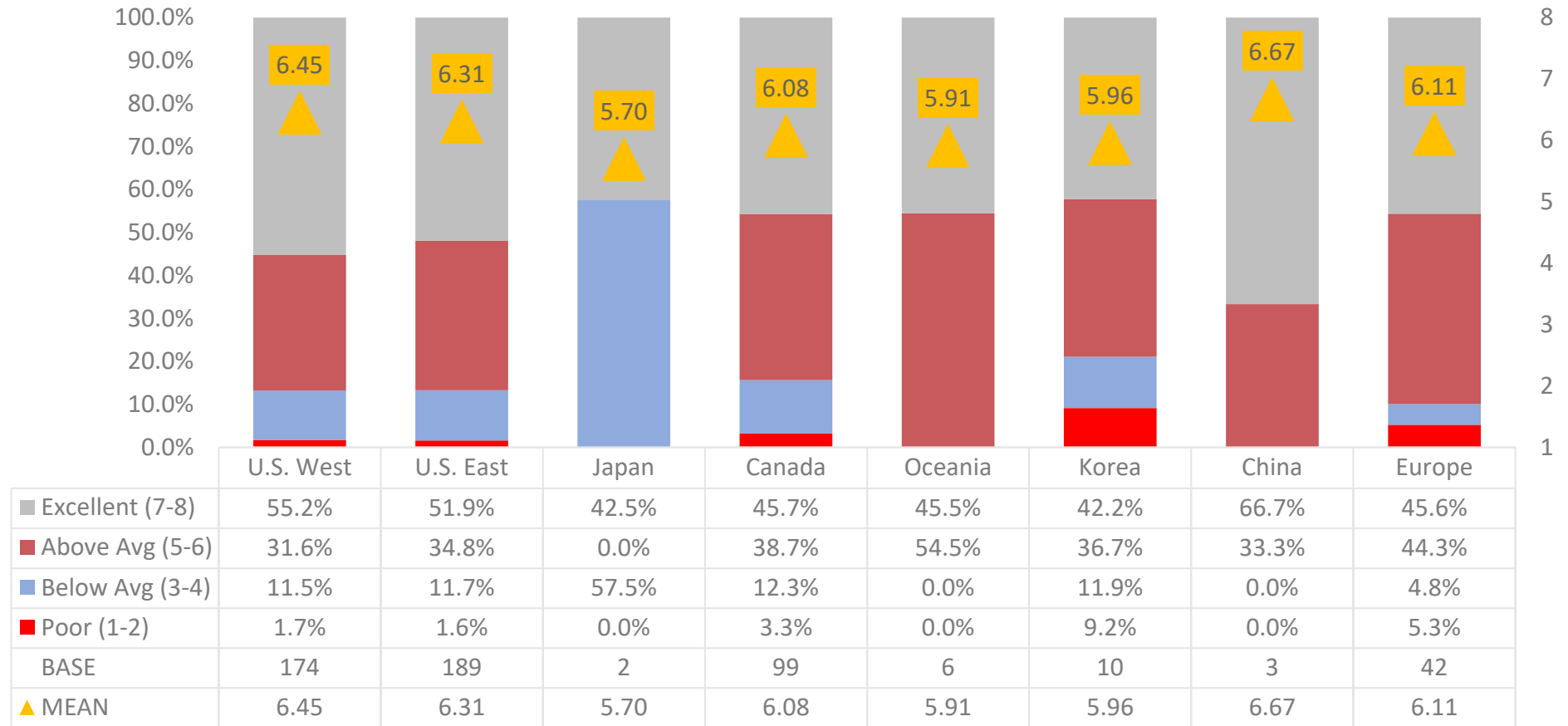
CULTURAL EXPERIENCES - MAUI

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



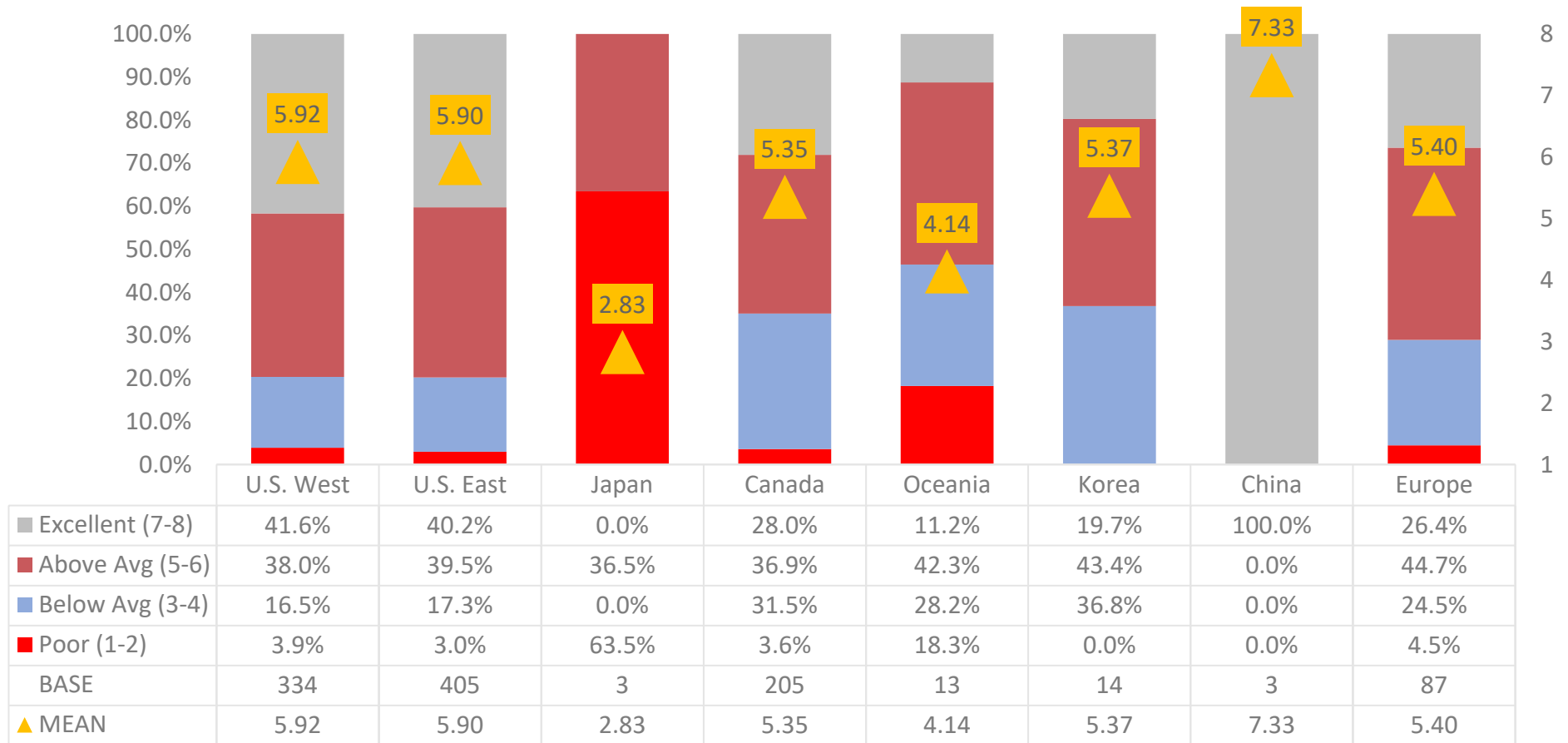
VOLUNTEER EXPERIENCES - MAUI

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



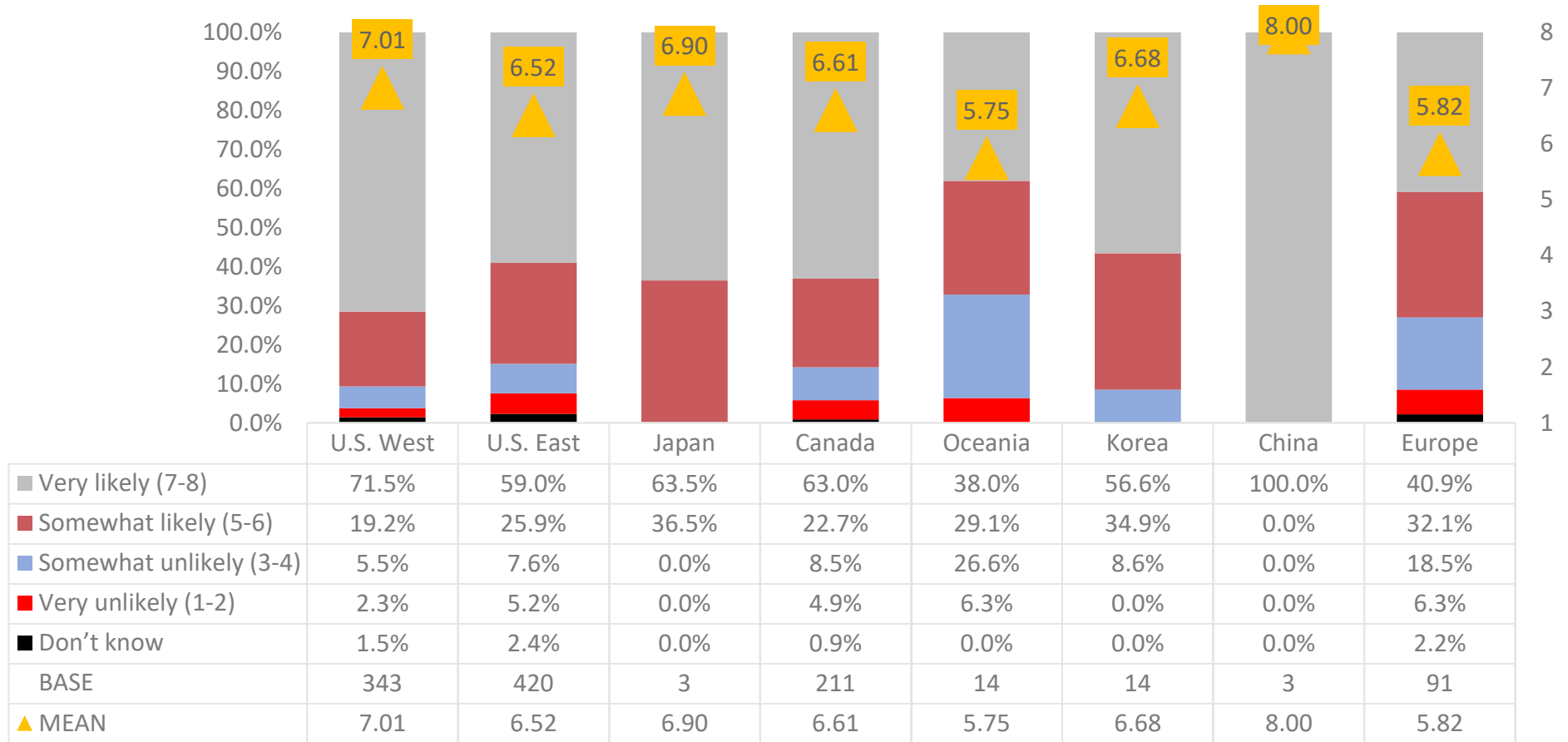
VALUE FOR THE MONEY - MAUI

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



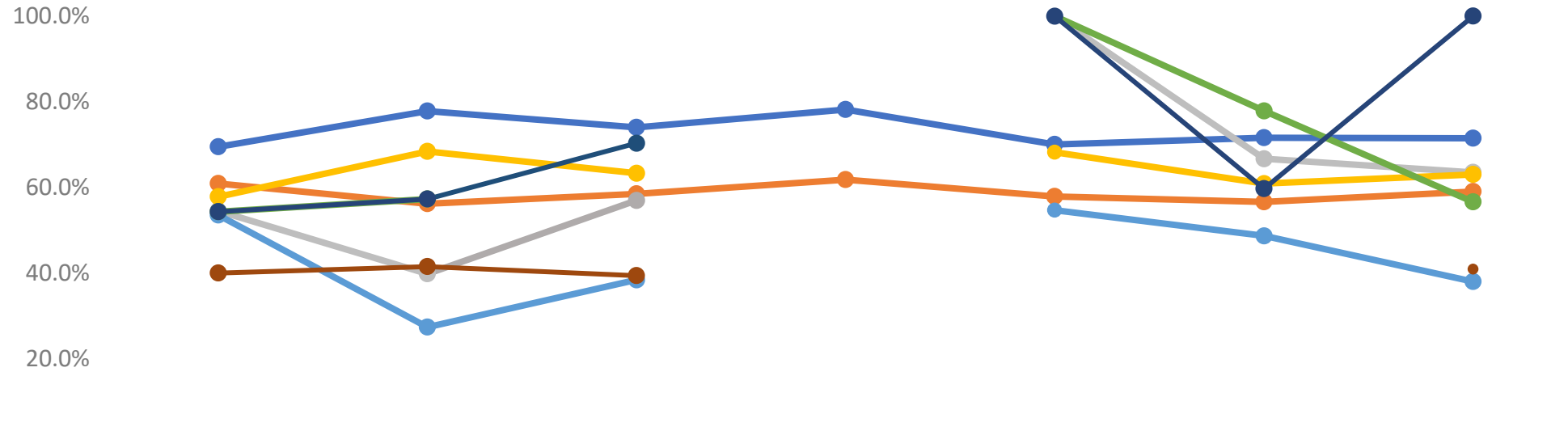
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



| | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 69.5% | 77.8% | 74.0% | 78.2% | 70.0% | 71.6% | 71.5% |
| U.S. East | 60.9% | 56.2% | 58.5% | 61.8% | 57.9% | 56.6% | 59.0% |
| Japan | 54.5% | 39.8% | 57.0% | | 100.0% | 66.7% | 63.5% |
| Canada | 57.8% | 68.4% | 63.3% | | 68.2% | 60.9% | 63.0% |
| Oceania | 53.5% | 27.4% | 38.4% | | 54.7% | 48.7% | 38.0% |
| Korea | 54.3% | 57.3% | 70.3% | | 100.0% | 77.9% | 56.6% |
| China | 54.3% | 57.3% | 70.3% | | 100.0% | 59.7% | 100.0% |
| Europe | 40.0% | 41.5% | 39.4% | | | | 40.9% |

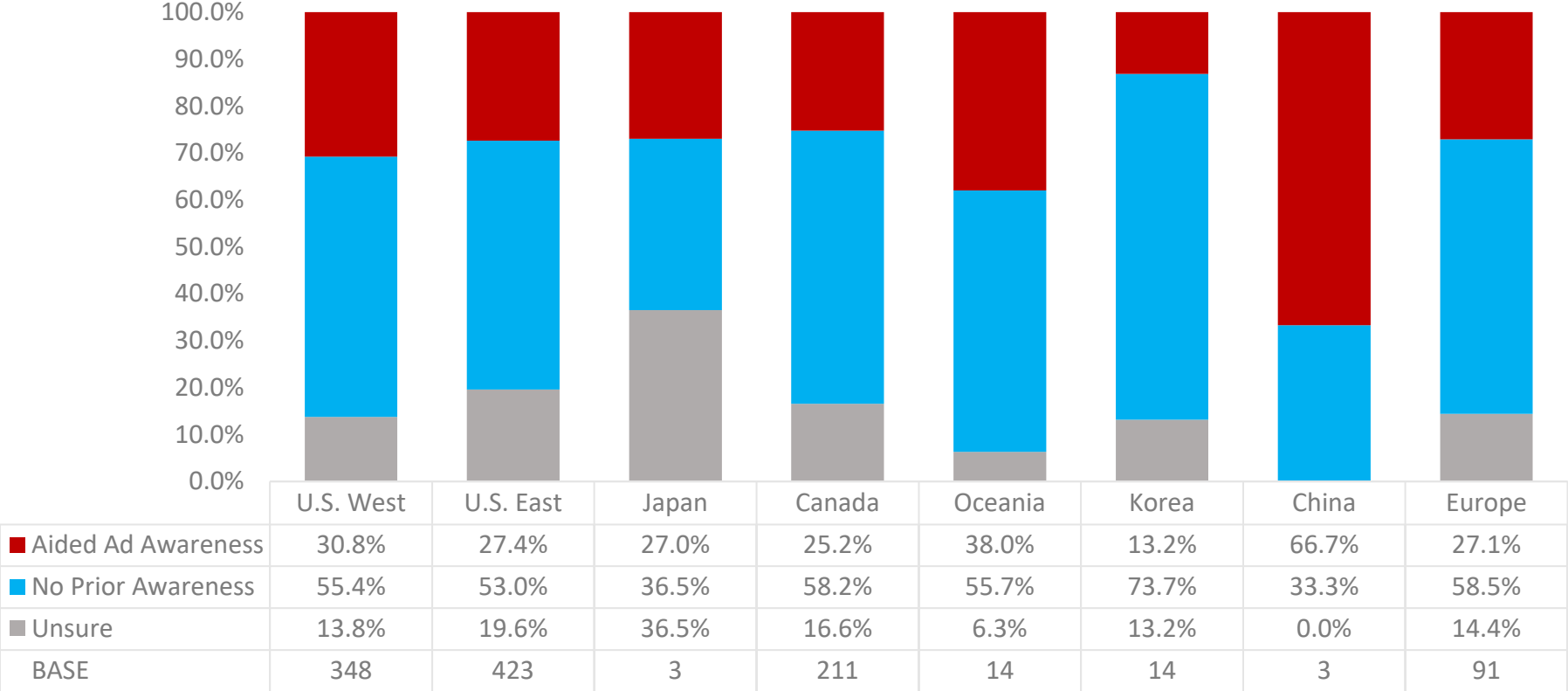
P= Preliminary Data

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

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



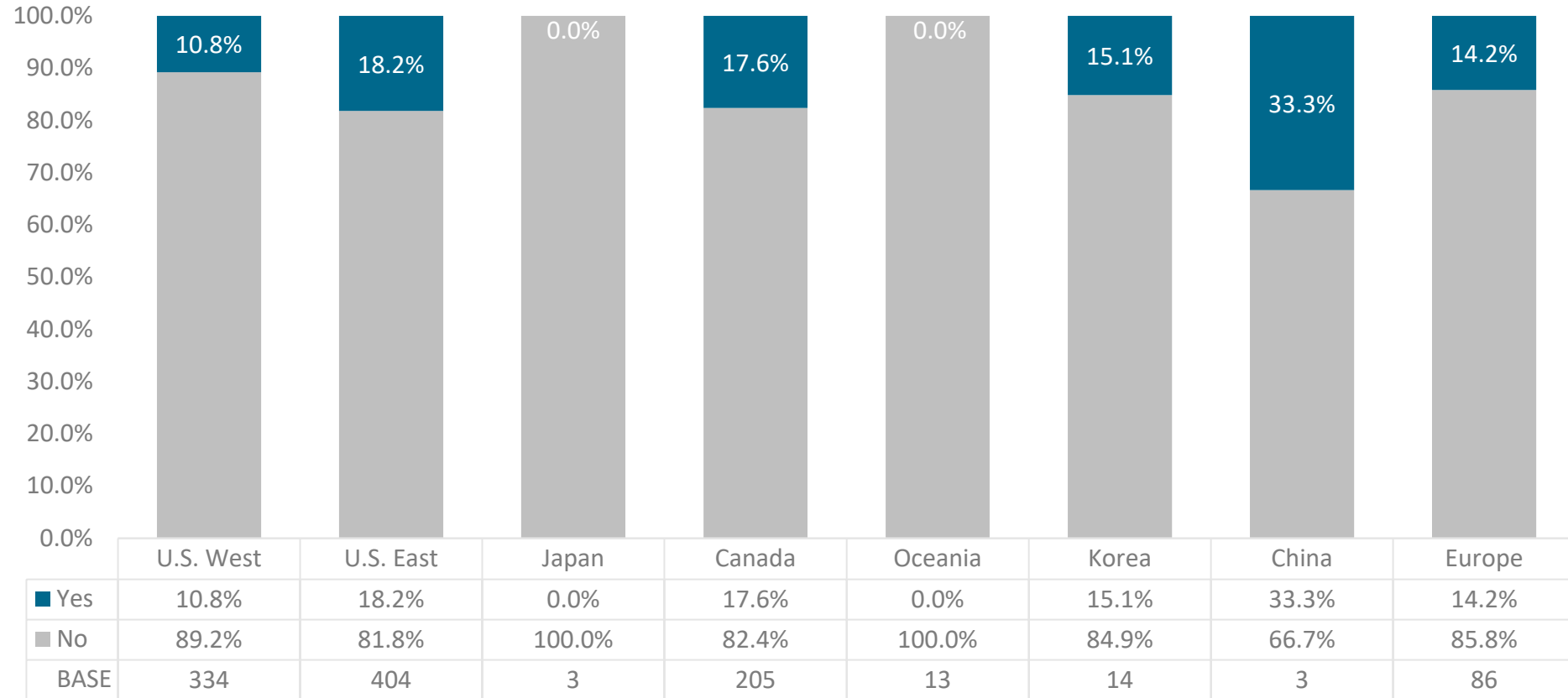
AIDED ADVERTISING AWARENESS - MAUI



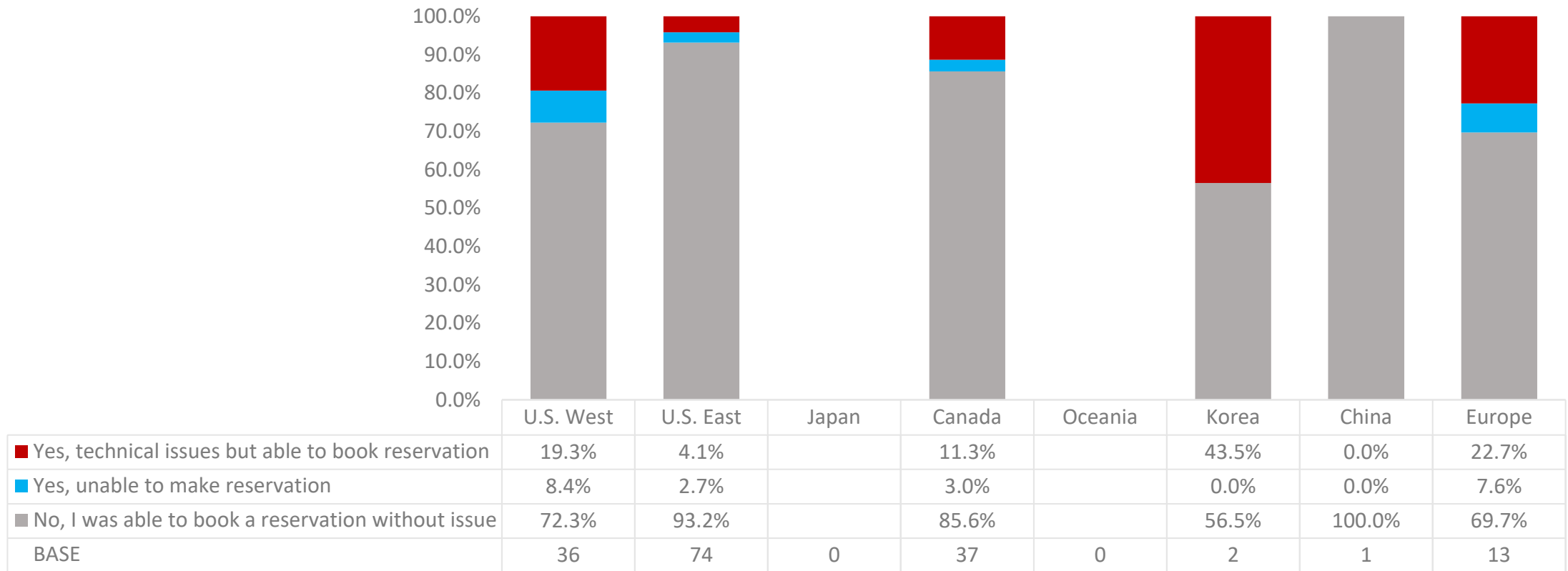
MOTIVATING FACTORS - MAUI

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Famous landmarks or imagery/ natural beauty | 33.6% | 47.0% | 73.0% | 44.0% | 39.2% | 58.6% | 66.7% | 42.8% |
| Hawaiian cultural events | 8.0% | 7.8% | 36.5% | 7.1% | 0.0% | 0.0% | 0.0% | 10.8% |
| Outdoor or sporting activities and events | 15.0% | 17.2% | 36.5% | 12.6% | 22.8% | 0.0% | 0.0% | 17.1% |
| Social media posts and videos | 11.8% | 9.2% | 36.5% | 12.0% | 0.0% | 13.2% | 33.3% | 17.5% |
| Hawaiian music | 7.2% | 6.4% | 36.5% | 4.3% | 0.0% | 0.0% | 0.0% | 4.5% |
| Television programs or movies filmed in Hawai'i | 5.2% | 6.4% | 27.0% | 8.4% | 6.3% | 0.0% | 0.0% | 6.9% |
| BASE | 348 | 423 | 3 | 211 | 14 | 14 | 3 | 91 |

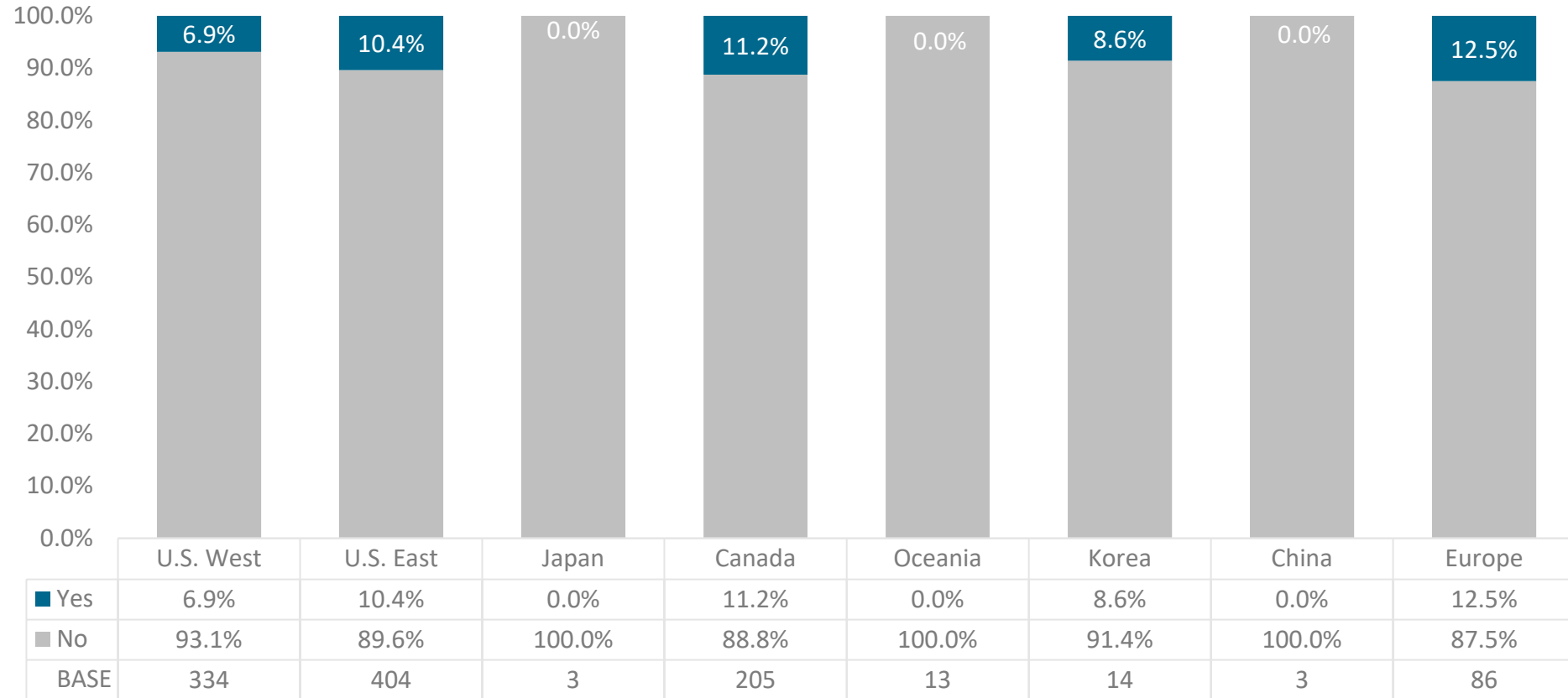
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



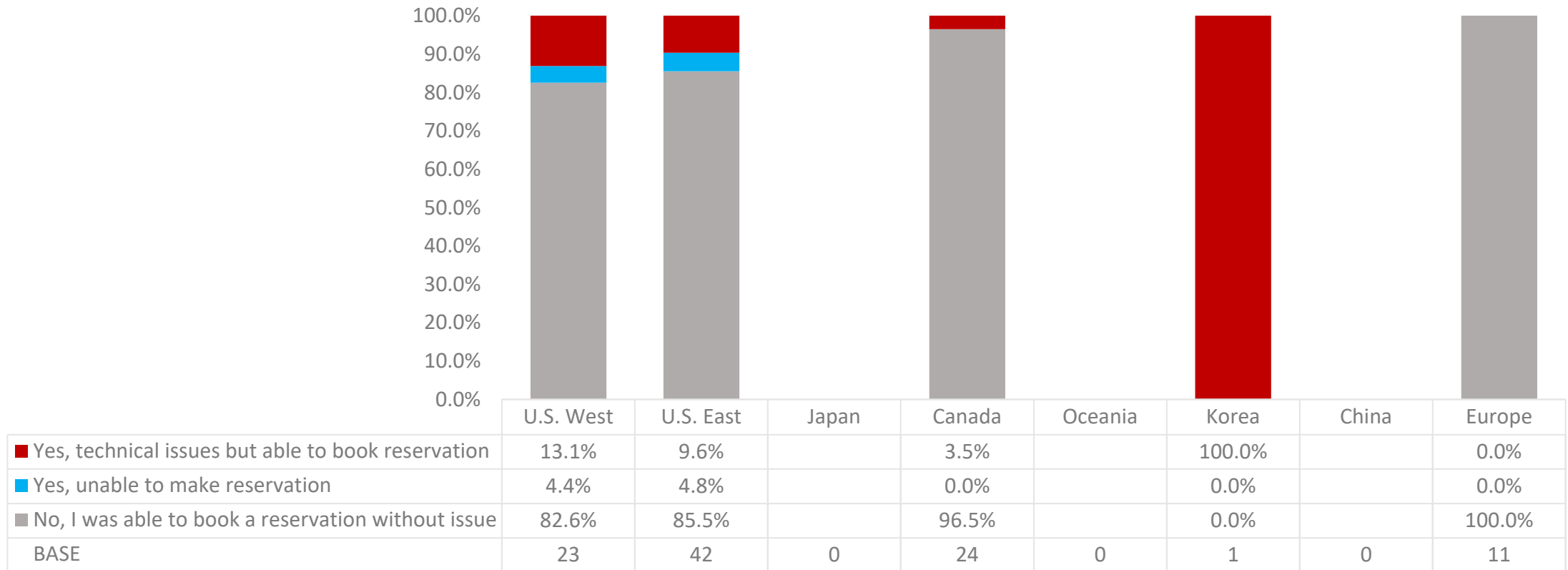
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



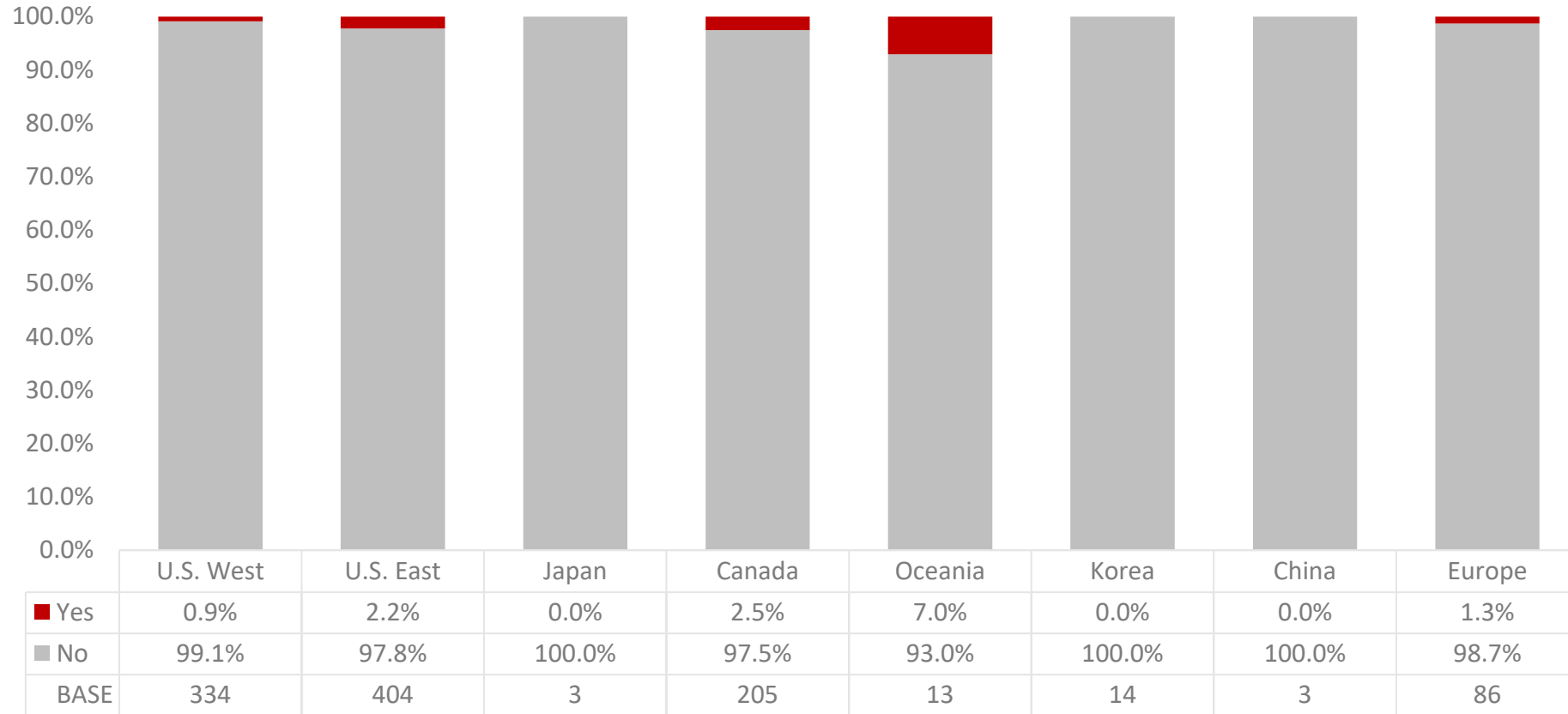
'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



VISITED MAUI FOR SPECIFIC EVENT



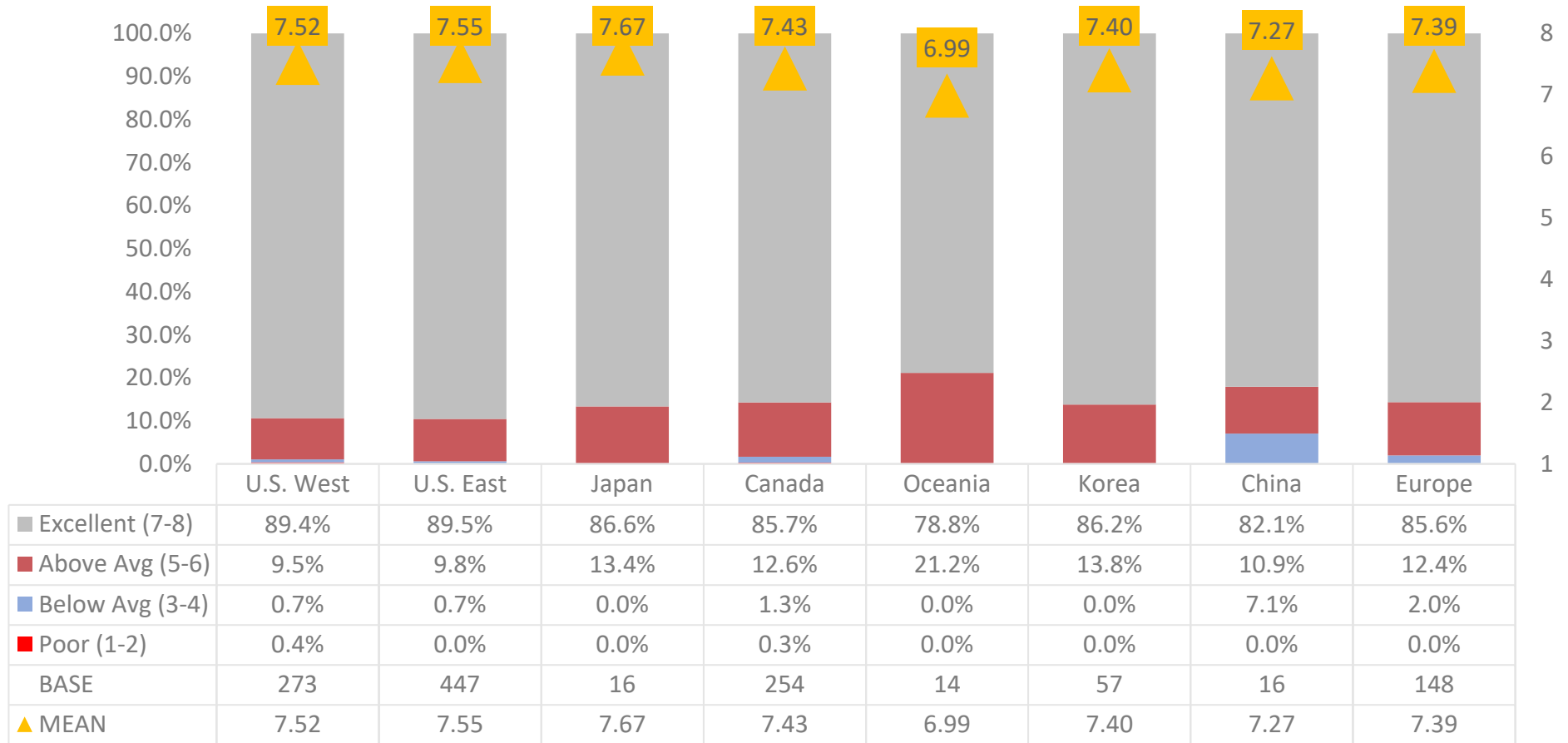
VISITED MAUI FOR SPECIFIC EVENT

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Sentry Tournament of Golf Champions | 33.3% | 33.2% | 0.0% | 42.3% | 100.0% | 0.0% | 0.0% | 0.0% |
| Maui Marathon | 33.3% | 11.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Other Festival/concert | 33.3% | 10.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Convention/ Conference/ Retreat/ Seminar/ Meeting/ Workshop/ Training/ Work event | 0.0% | 0.0% | 0.0% | 36.6% | 0.0% | 0.0% | 0.0% | 100.0% |
| Other sporting event | 0.0% | 11.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Whale Watching | 0.0% | 11.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Wedding/ Honeymoon/ Anniversary/ Birthday/ Funeral/ Graduation | 0.0% | 11.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Other (please specify festival/event name) | 0.0% | 11.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Hawaii Food and Wine Festival | 0.0% | 0.0% | 0.0% | 21.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 3 | 9 | 0 | 5 | 1 | 0 | 0 | 1 |

Section 8 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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



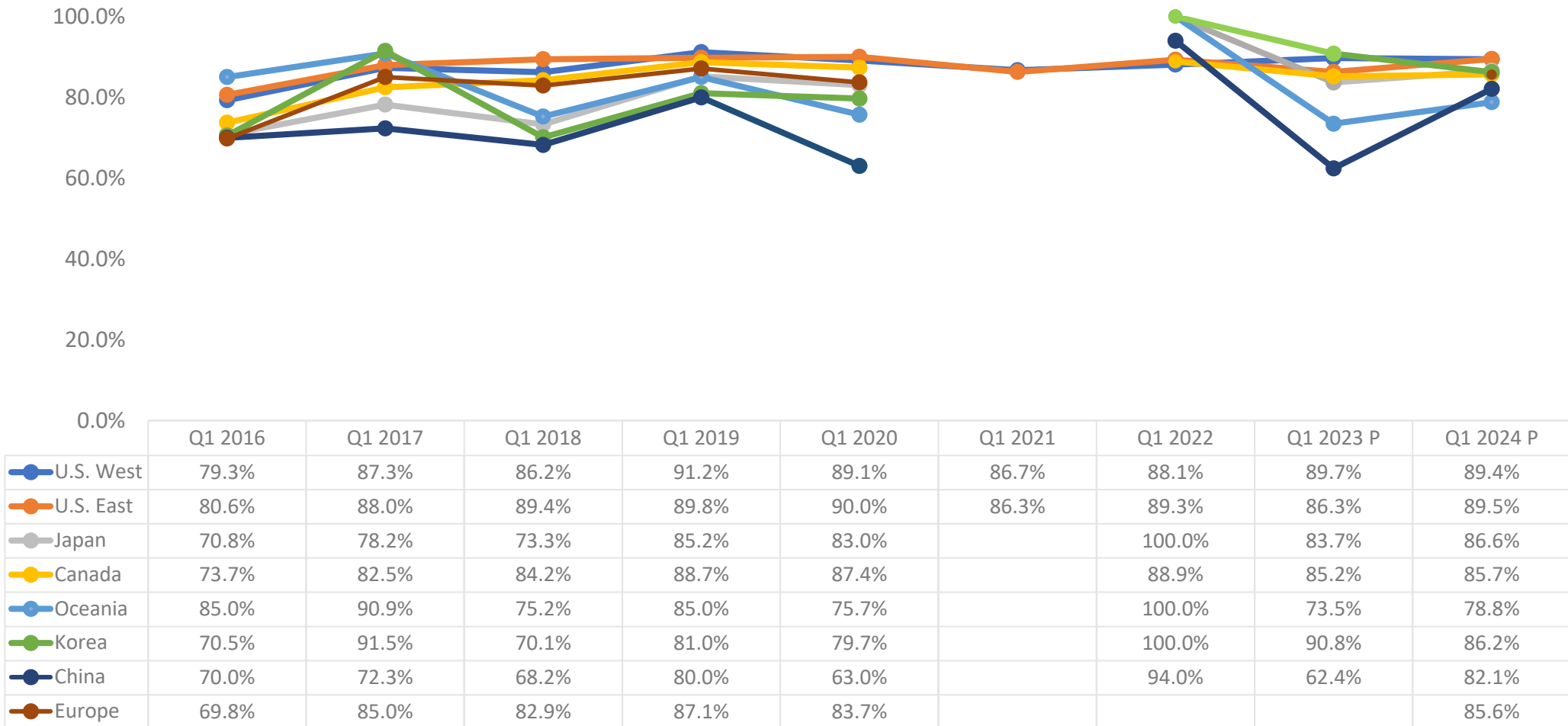
SATISFACTION - ISLAND OF HAWAI'I

- **Gender:** Females from **U.S. West** gave higher satisfaction scores than males.
- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only the Island of Hawai'i were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Household Income:** Visitors from **U.S. West** who reside in homes in the bottom income tier (<\$100K) gave higher satisfaction scores.

SATISFACTION - ISLAND OF HAWAI‘I

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

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



P= Preliminary Data

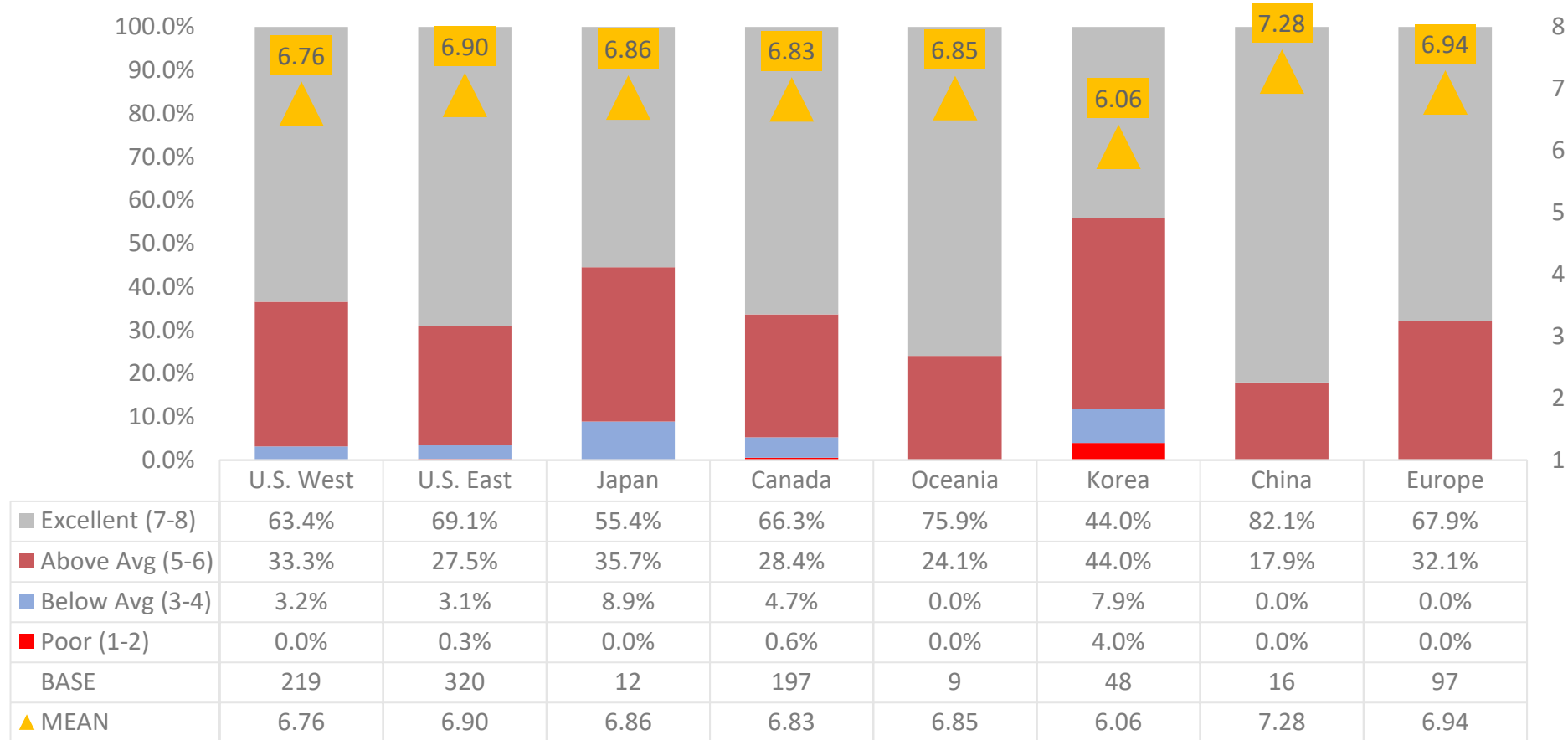
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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



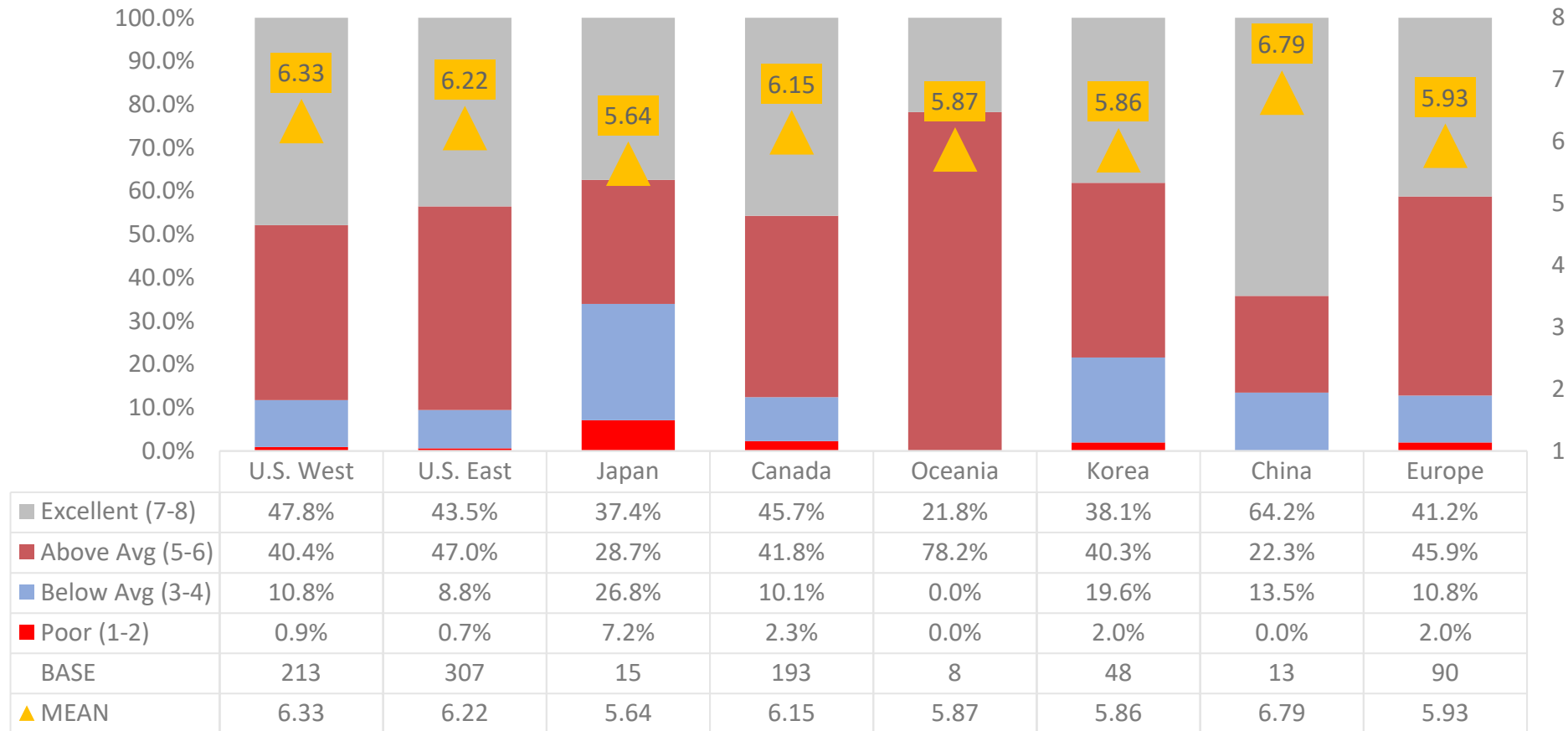
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



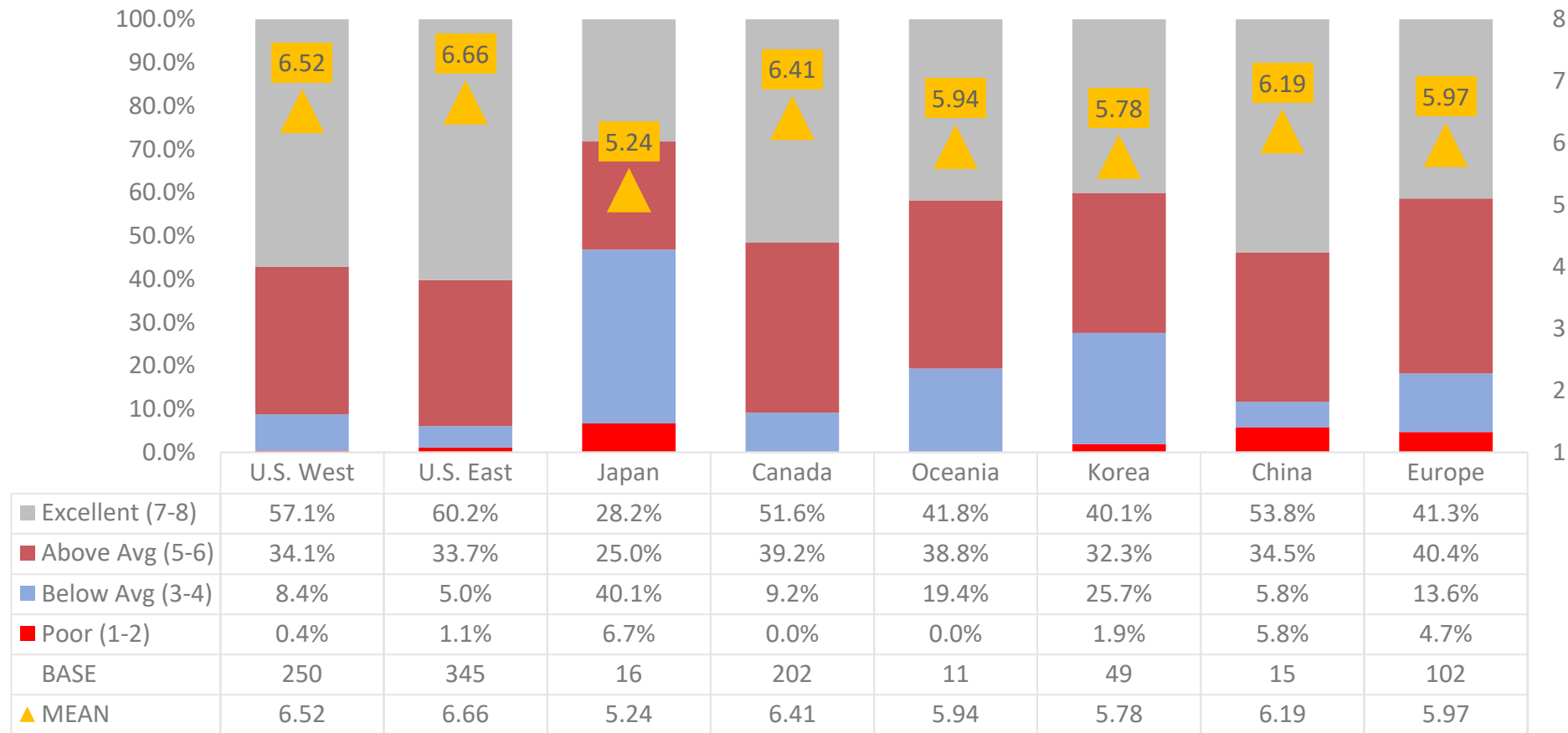
SHOPPING - ISLAND OF HAWAI'I

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



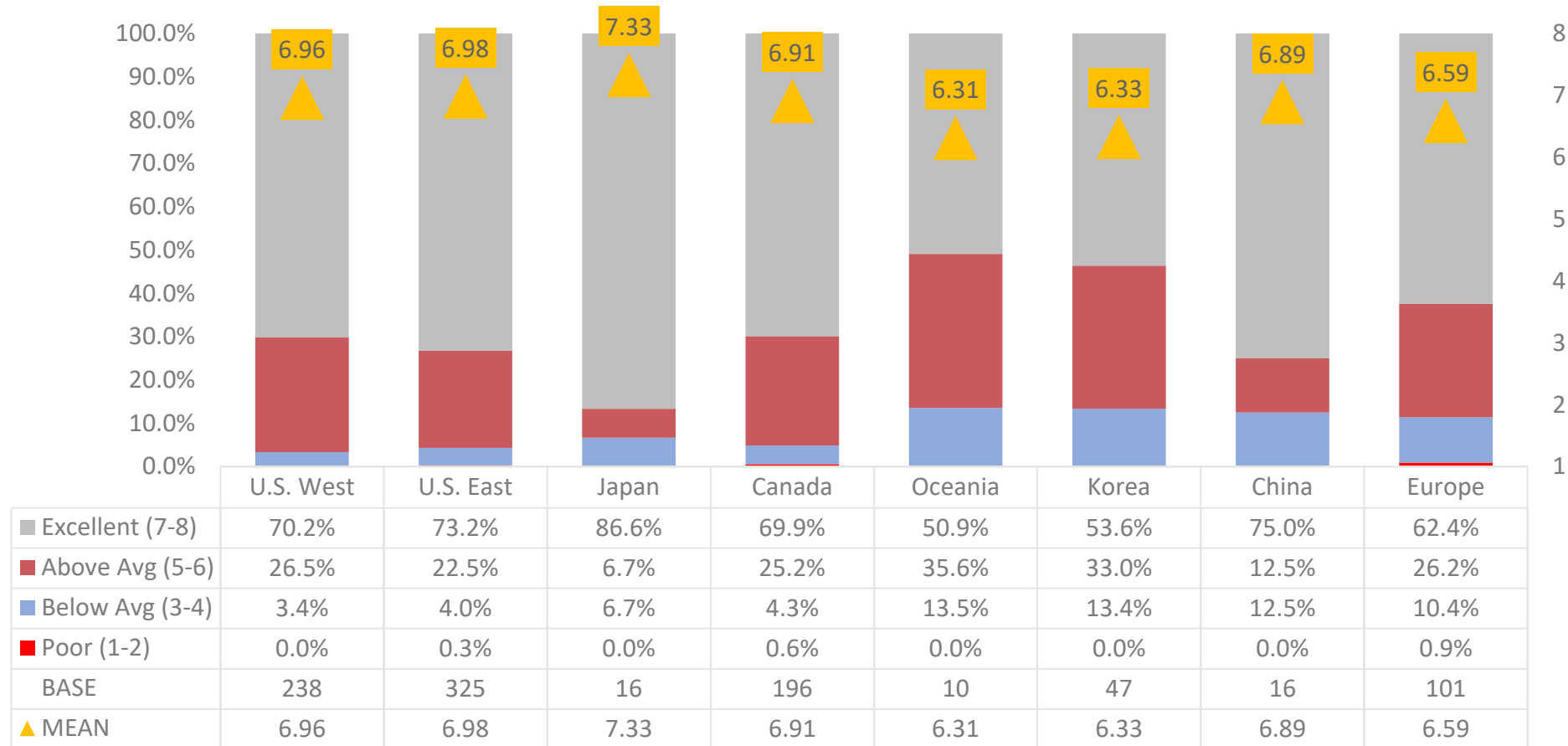
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



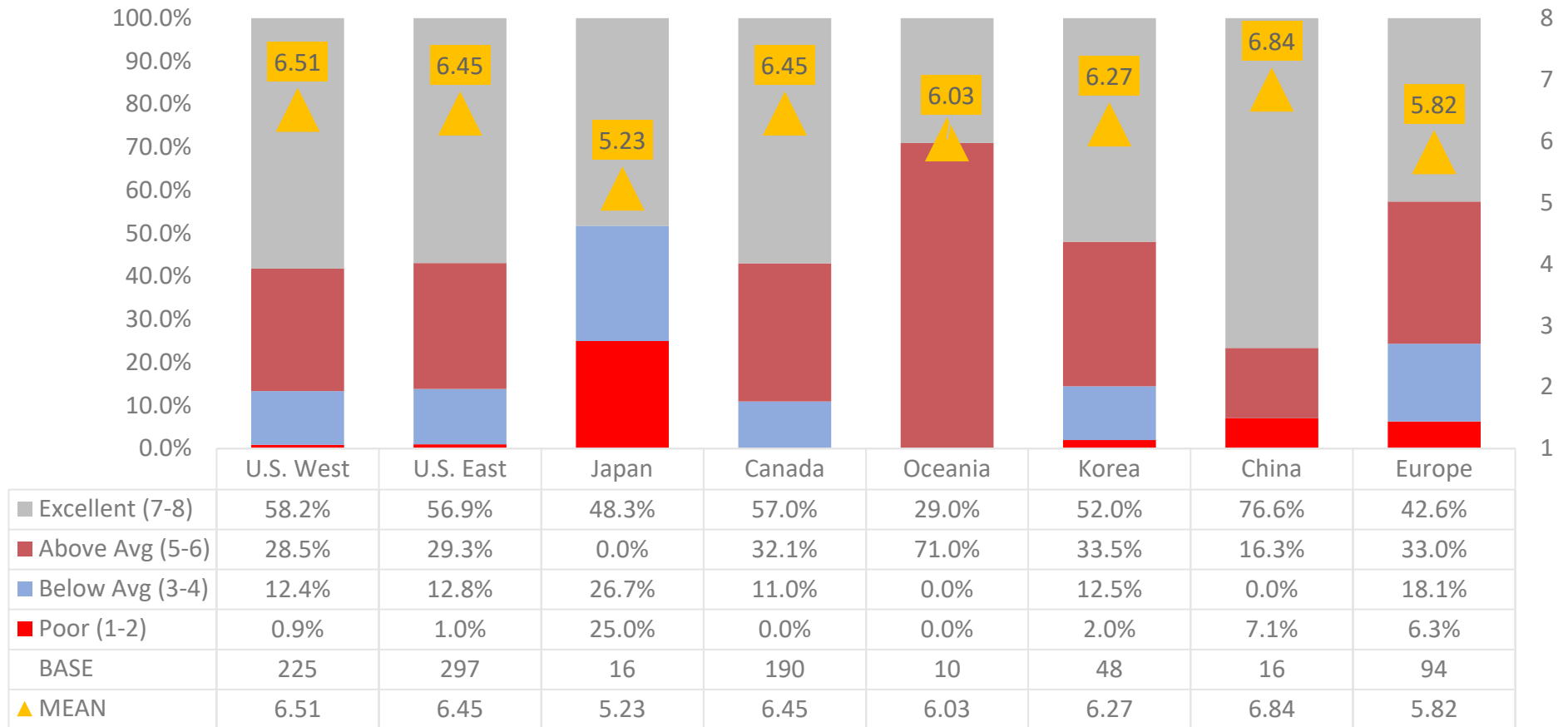
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



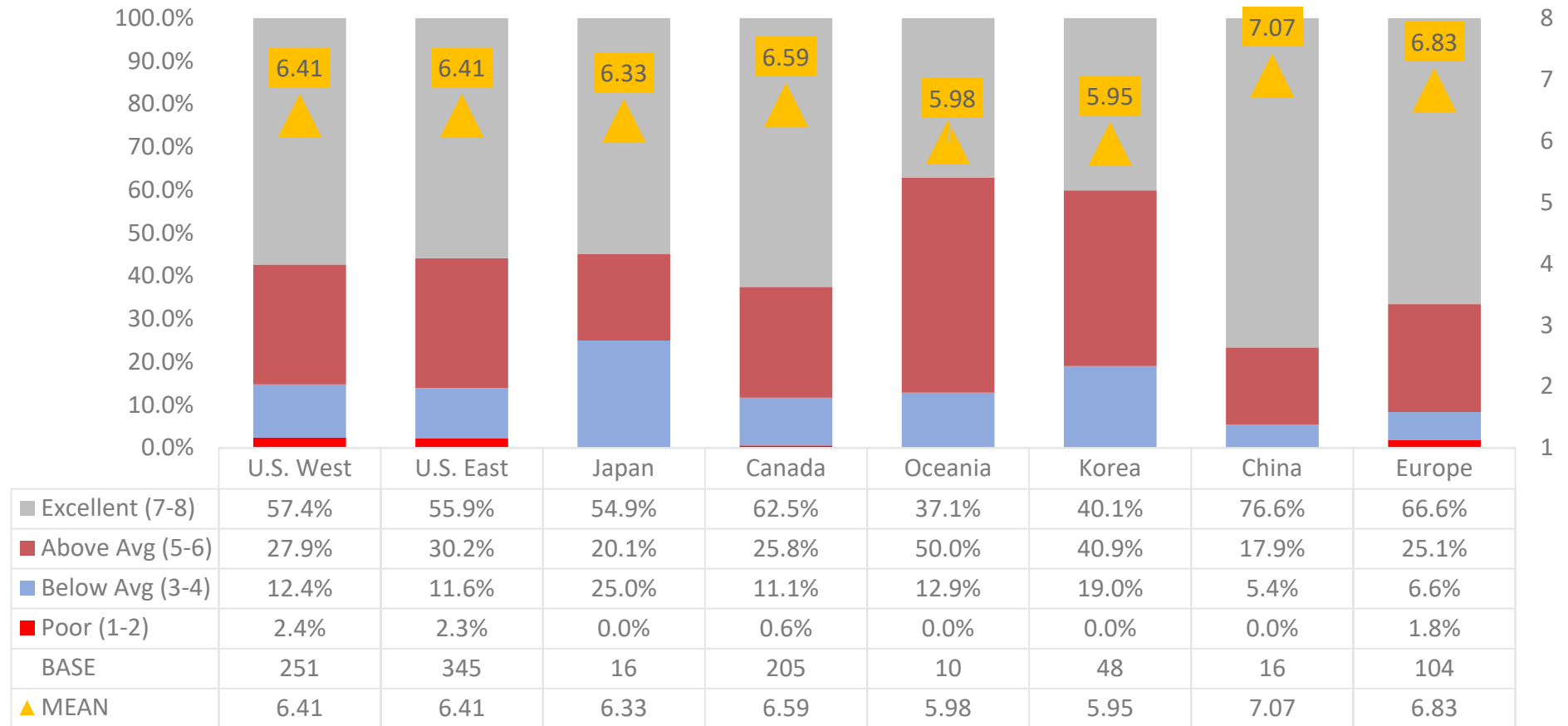
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



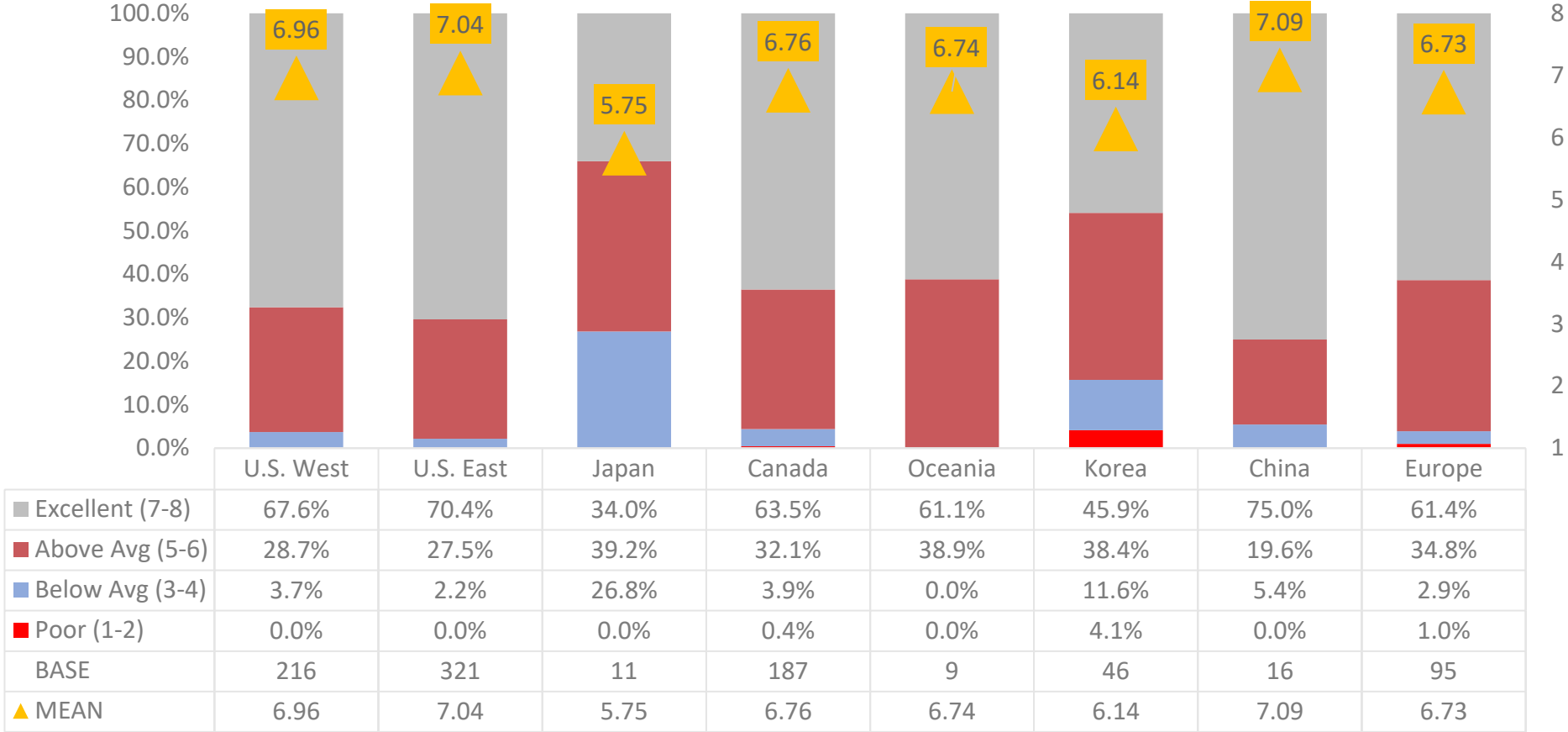
AIRPORT- ISLAND OF HAWAI'I

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



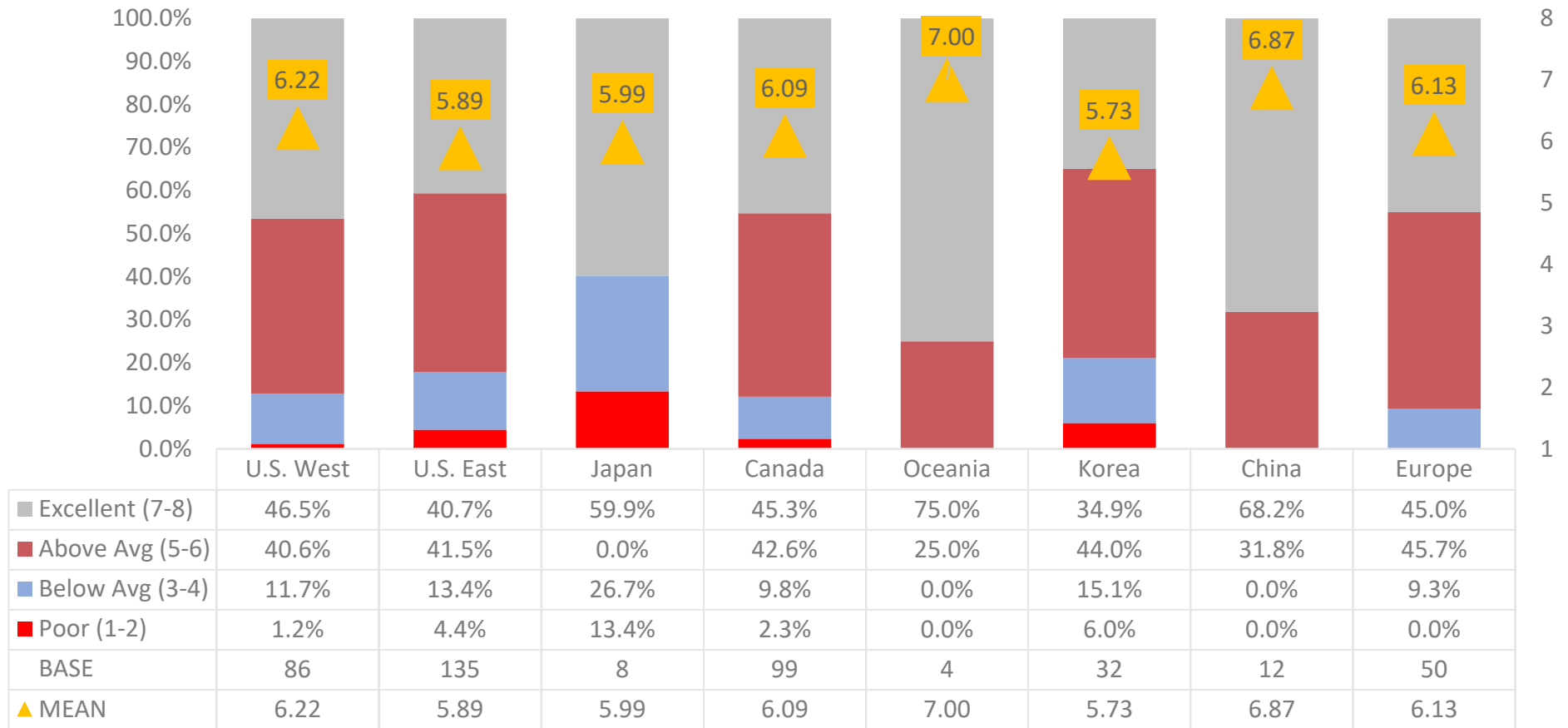
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



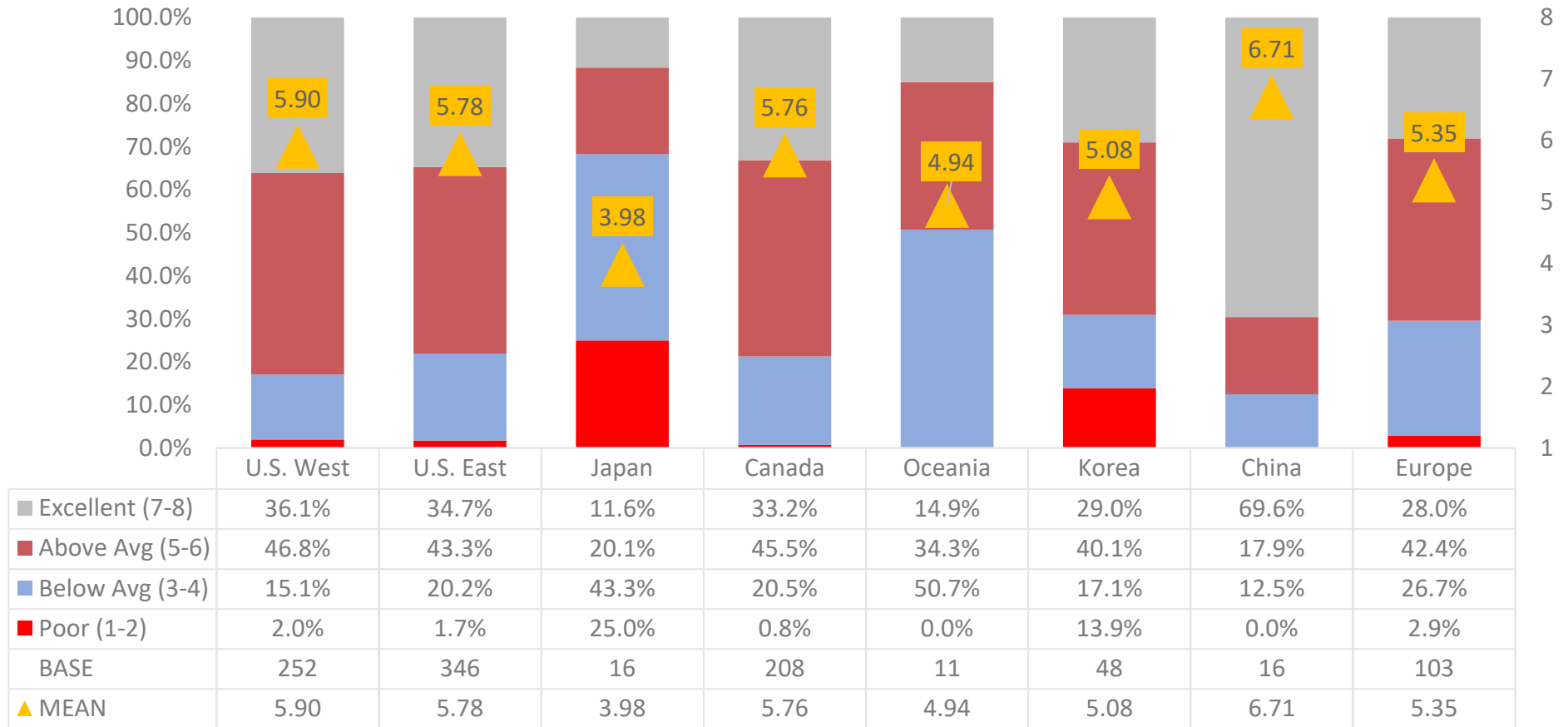
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



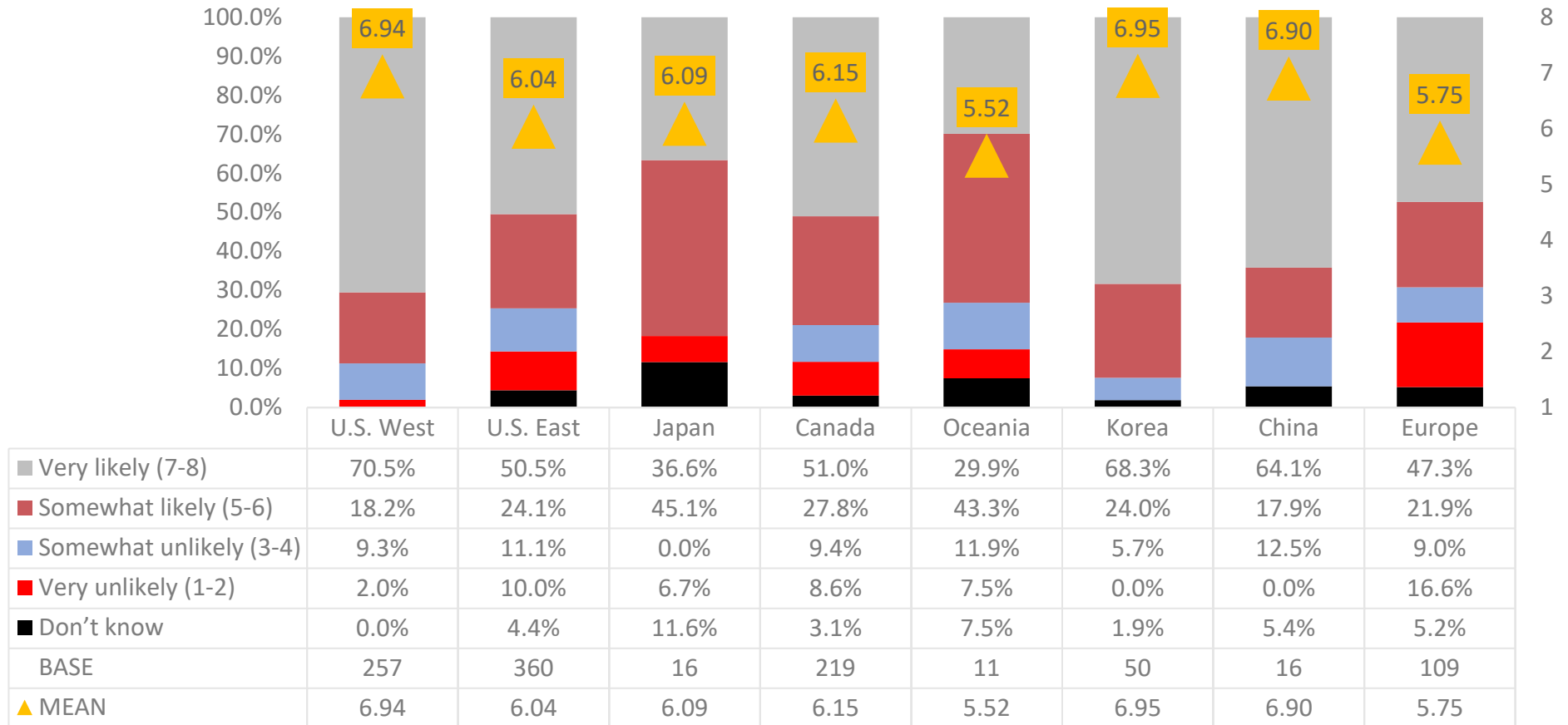
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



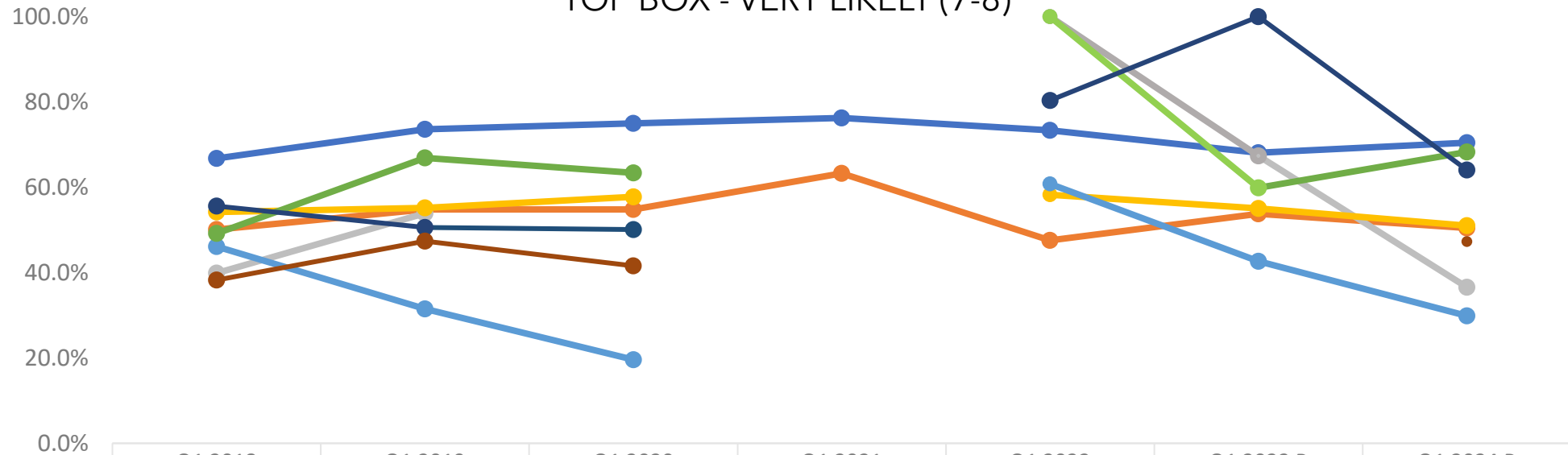
LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)



| | Q1 2018 | Q1 2019 | Q1 2020 | Q1 2021 | Q1 2022 | Q1 2023 P | Q1 2024 P |
|-----------|---------|---------|---------|---------|---------|-----------|-----------|
| U.S. West | 66.8% | 73.6% | 75.0% | 76.3% | 73.4% | 68.1% | 70.5% |
| U.S. East | 50.1% | 54.8% | 54.8% | 63.3% | 47.6% | 53.8% | 50.5% |
| Japan | 39.9% | 53.9% | 52.8% | | 100.0% | 67.4% | 36.6% |
| Canada | 54.2% | 55.2% | 57.8% | | 58.3% | 55.1% | 51.0% |
| Oceania | 46.1% | 31.5% | 19.6% | | 60.8% | 42.7% | 29.9% |
| Korea | 49.2% | 66.9% | 63.4% | | 100.0% | 59.9% | 68.3% |
| China | 55.6% | 50.6% | 50.1% | | 80.4% | 100.0% | 64.1% |
| Europe | 38.3% | 47.4% | 41.6% | | | | 47.3% |

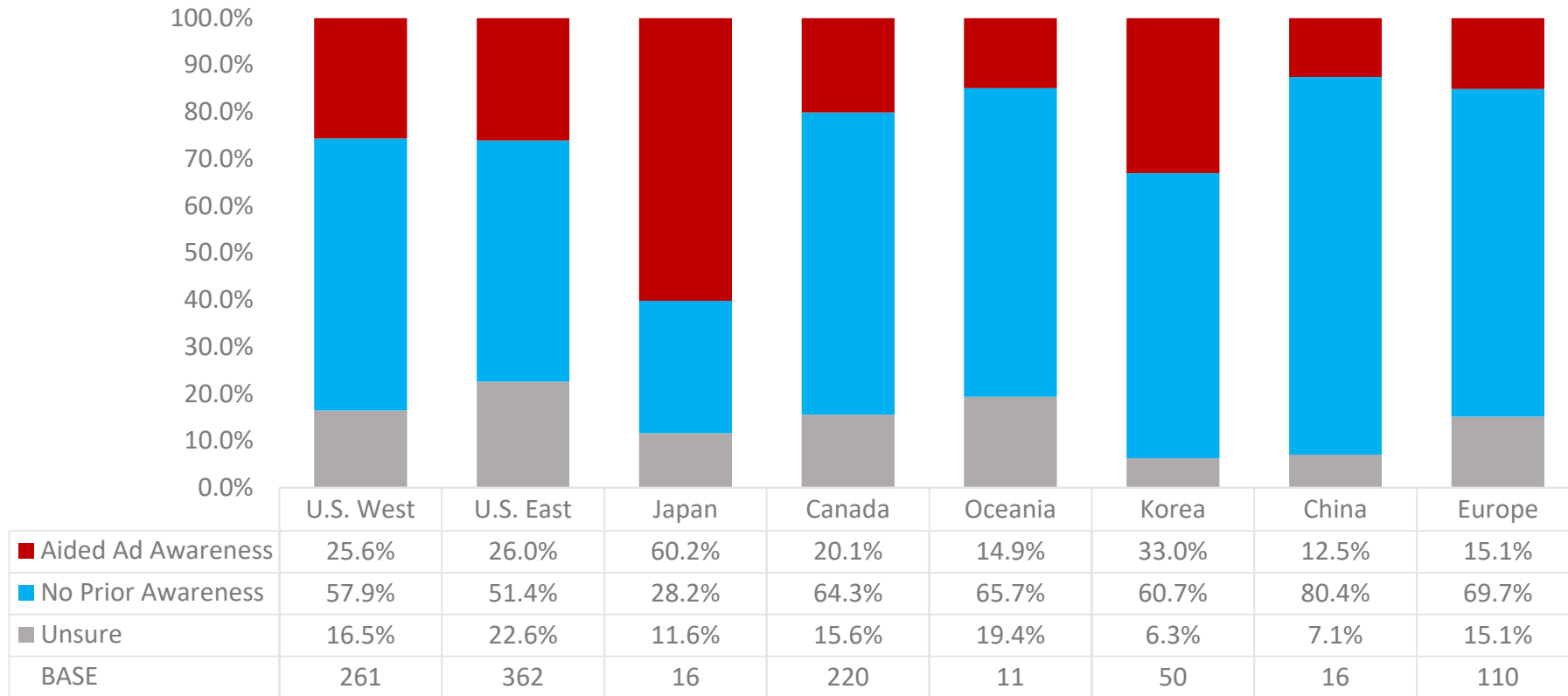
P= Preliminary Data

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

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



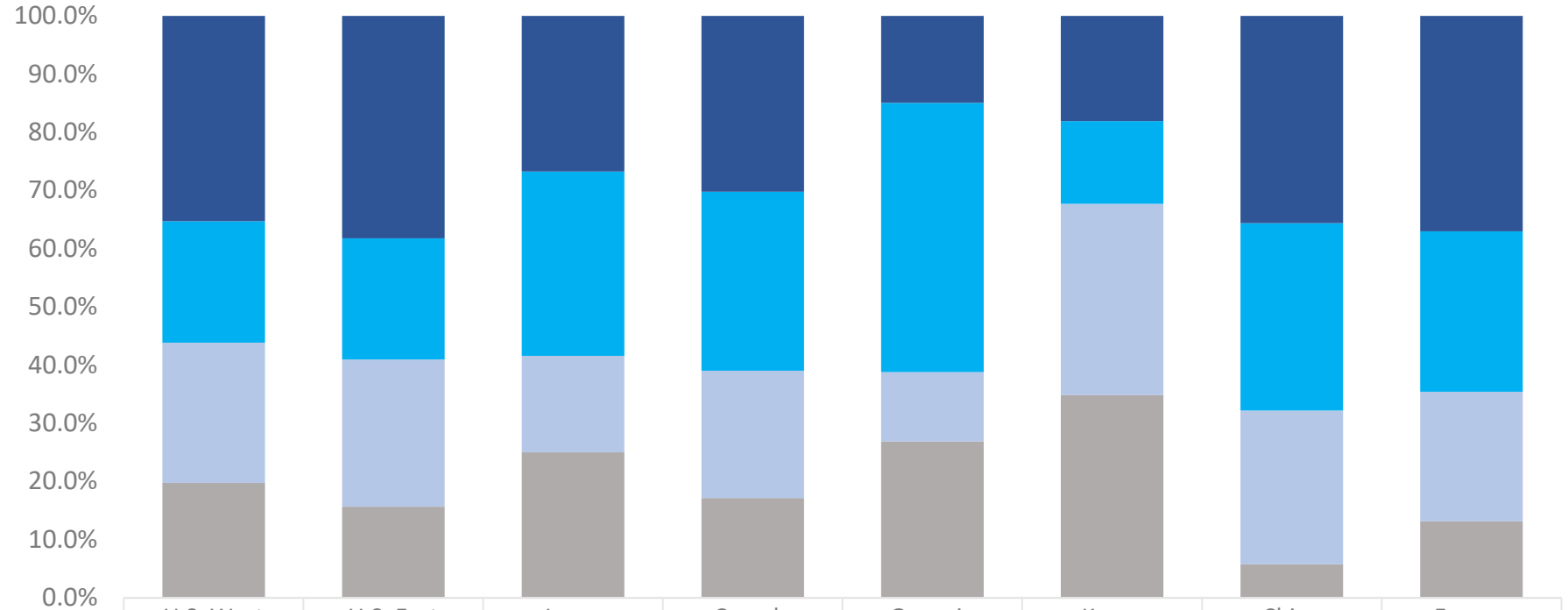
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

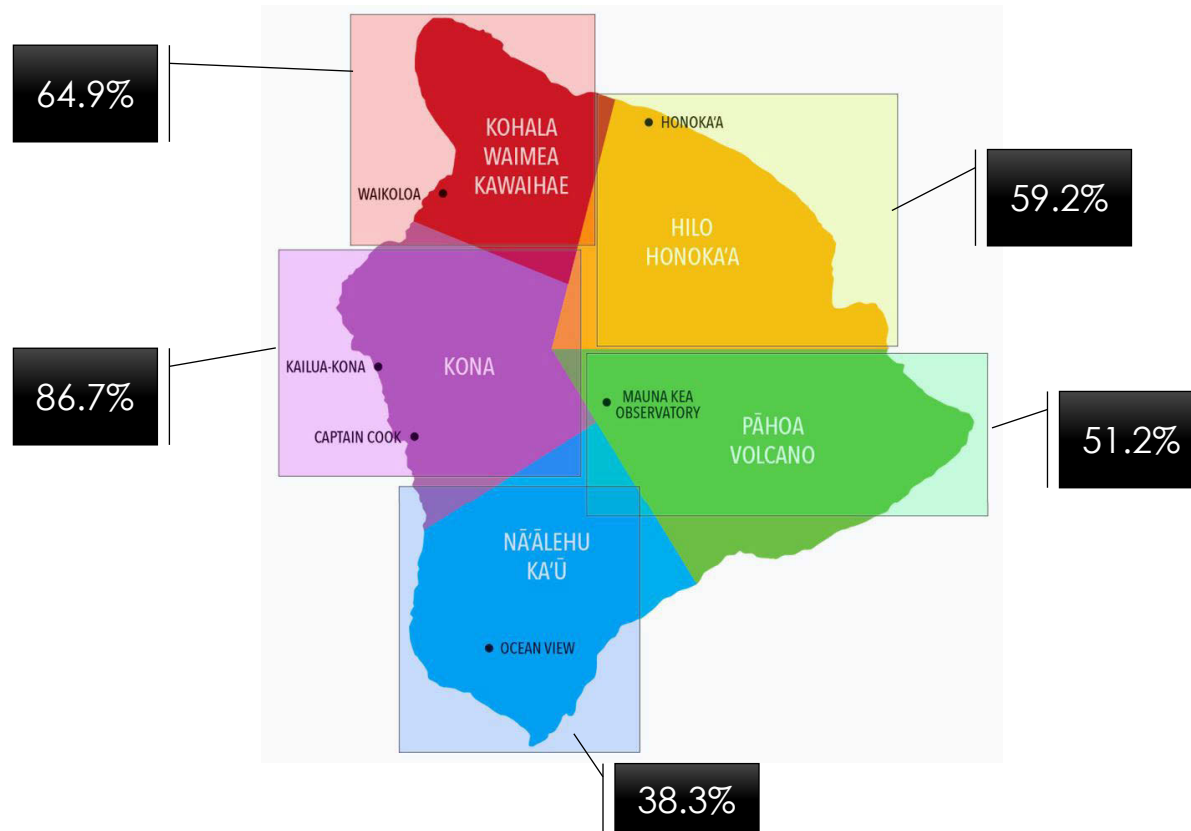
| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Famous landmarks or imagery/ natural beauty | 50.2% | 57.7% | 51.7% | 45.9% | 58.2% | 65.1% | 75.0% | 54.4% |
| Outdoor or sporting activities and events | 17.2% | 13.0% | 25.0% | 14.3% | 7.5% | 8.2% | 14.1% | 17.1% |
| Hawaiian cultural events | 10.7% | 11.6% | 0.0% | 9.7% | 0.0% | 1.9% | 12.5% | 7.4% |
| Social media posts and videos | 9.9% | 9.1% | 11.6% | 11.4% | 14.9% | 15.3% | 12.5% | 11.4% |
| Television programs or movies filmed in Hawai'i | 5.0% | 6.3% | 29.9% | 8.1% | 0.0% | 7.6% | 0.0% | 13.1% |
| Hawaiian music | 7.7% | 8.0% | 6.7% | 4.3% | 7.5% | 1.9% | 0.0% | 9.6% |
| BASE | 261 | 362 | 16 | 220 | 11 | 50 | 16 | 110 |

TRAVEL ON ISLAND OF HAWAI'I

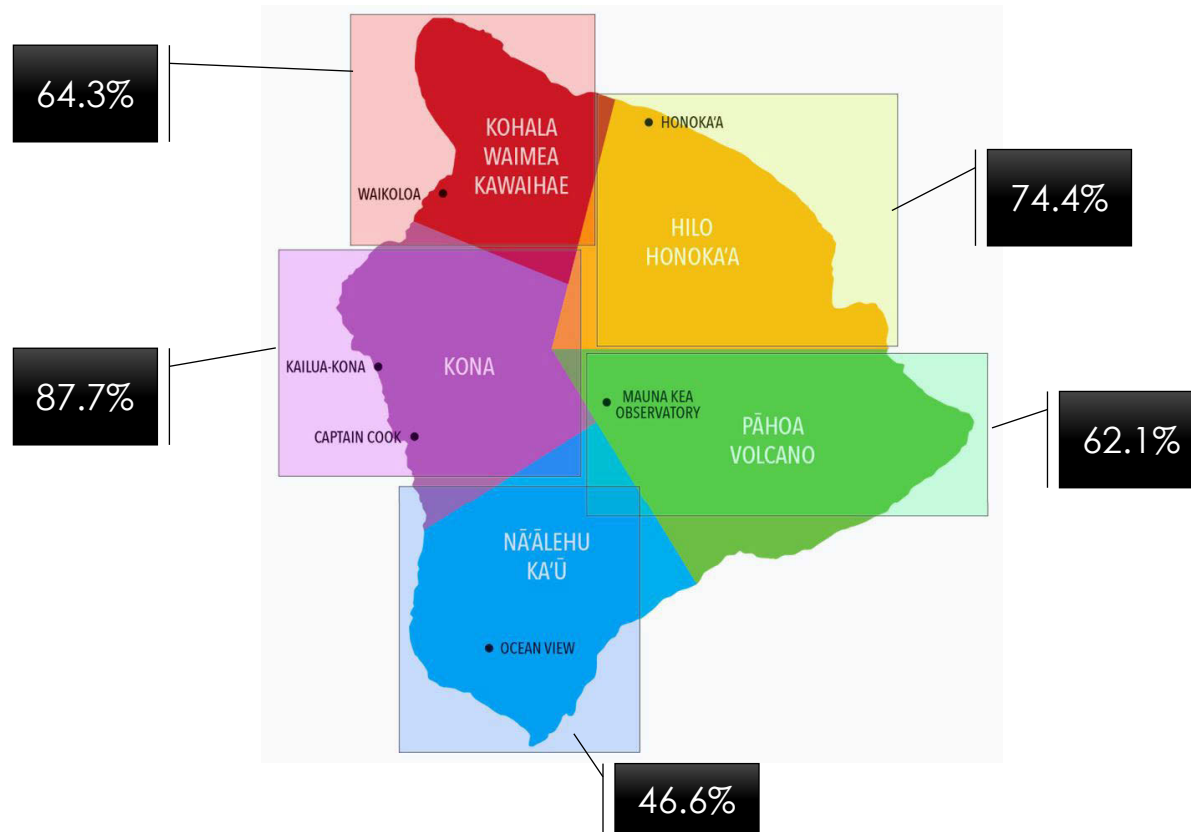


| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Traveled to other side of island | 35.3% | 38.2% | 26.7% | 30.2% | 14.9% | 18.1% | 35.6% | 37.0% |
| Traveled more than 1 hour one way to reach activities | 20.9% | 20.8% | 31.7% | 30.7% | 46.3% | 14.2% | 32.2% | 27.6% |
| Traveled 1 hour or less one way to reach activity | 24.1% | 25.3% | 16.6% | 21.9% | 11.9% | 32.9% | 26.4% | 22.2% |
| Enjoy activities- short drive from accommodations | 19.7% | 15.6% | 25.0% | 17.1% | 26.9% | 34.8% | 5.7% | 13.2% |
| BASE | 249 | 345 | 16 | 205 | 11 | 49 | 15 | 100 |

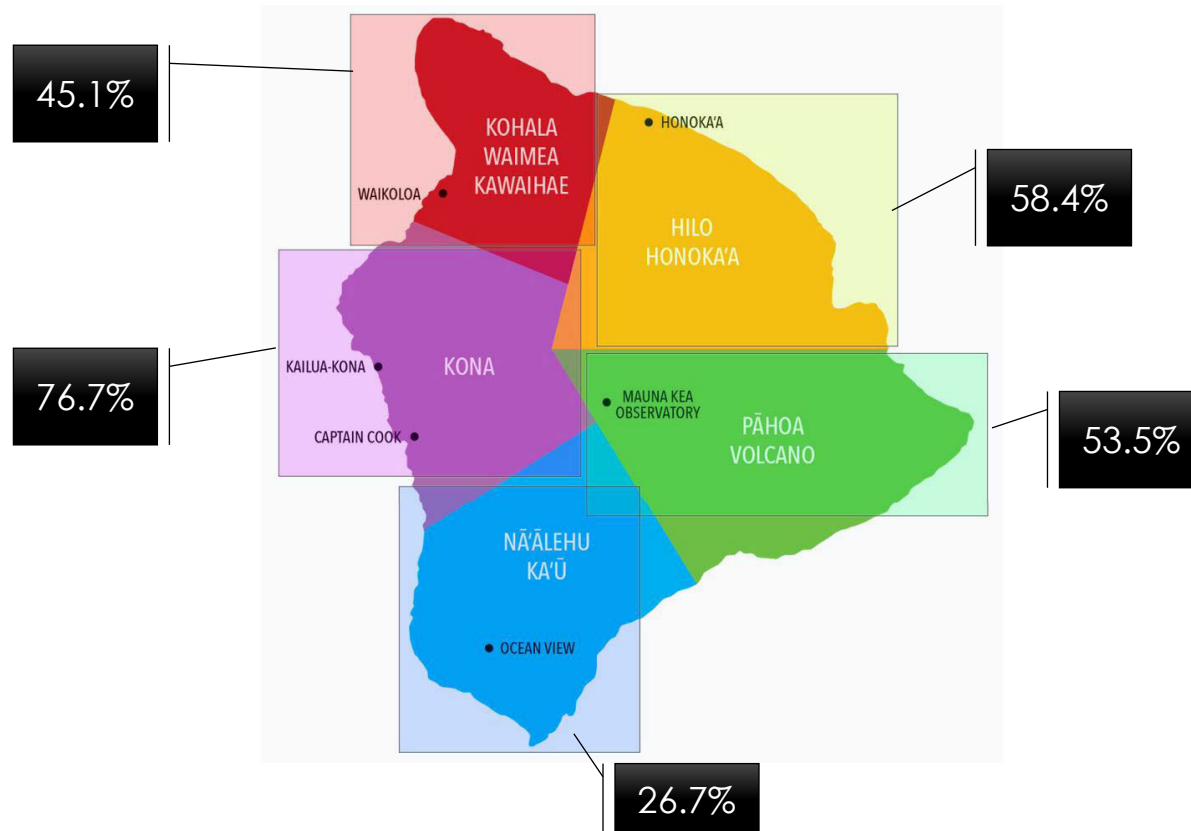
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



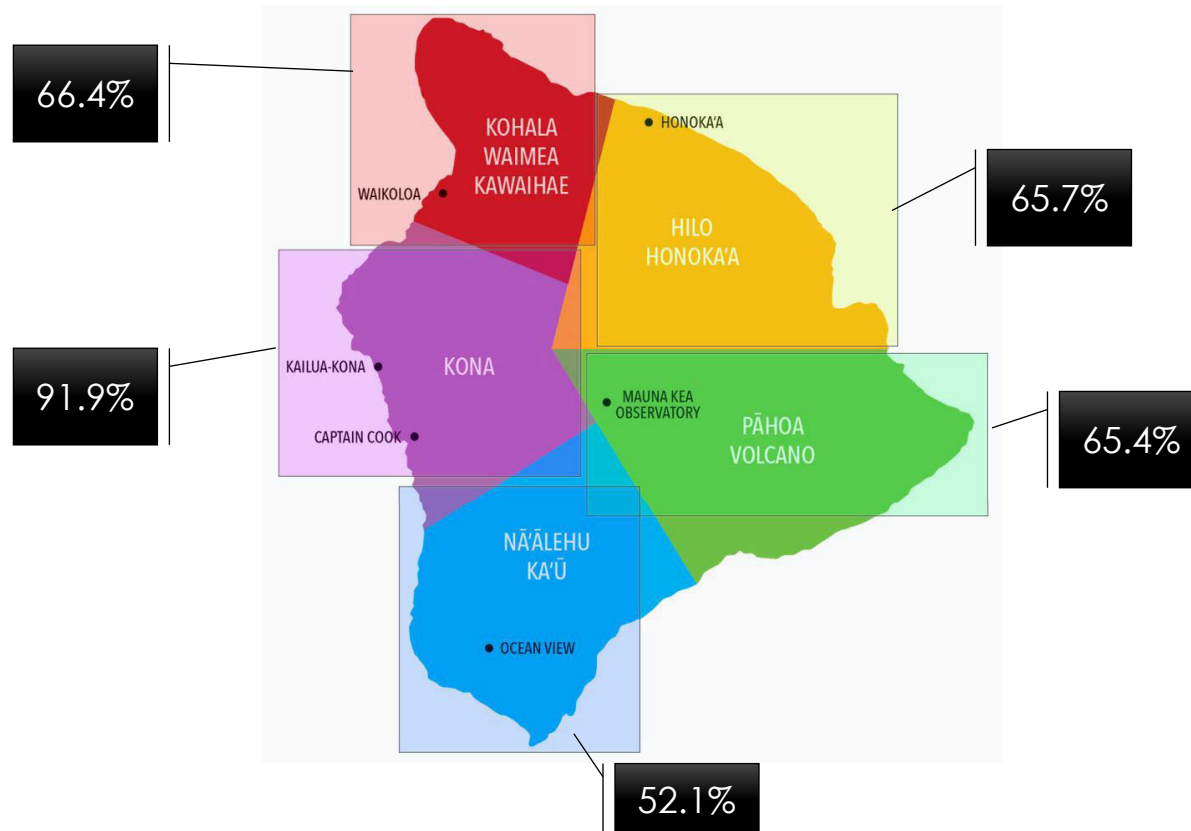
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



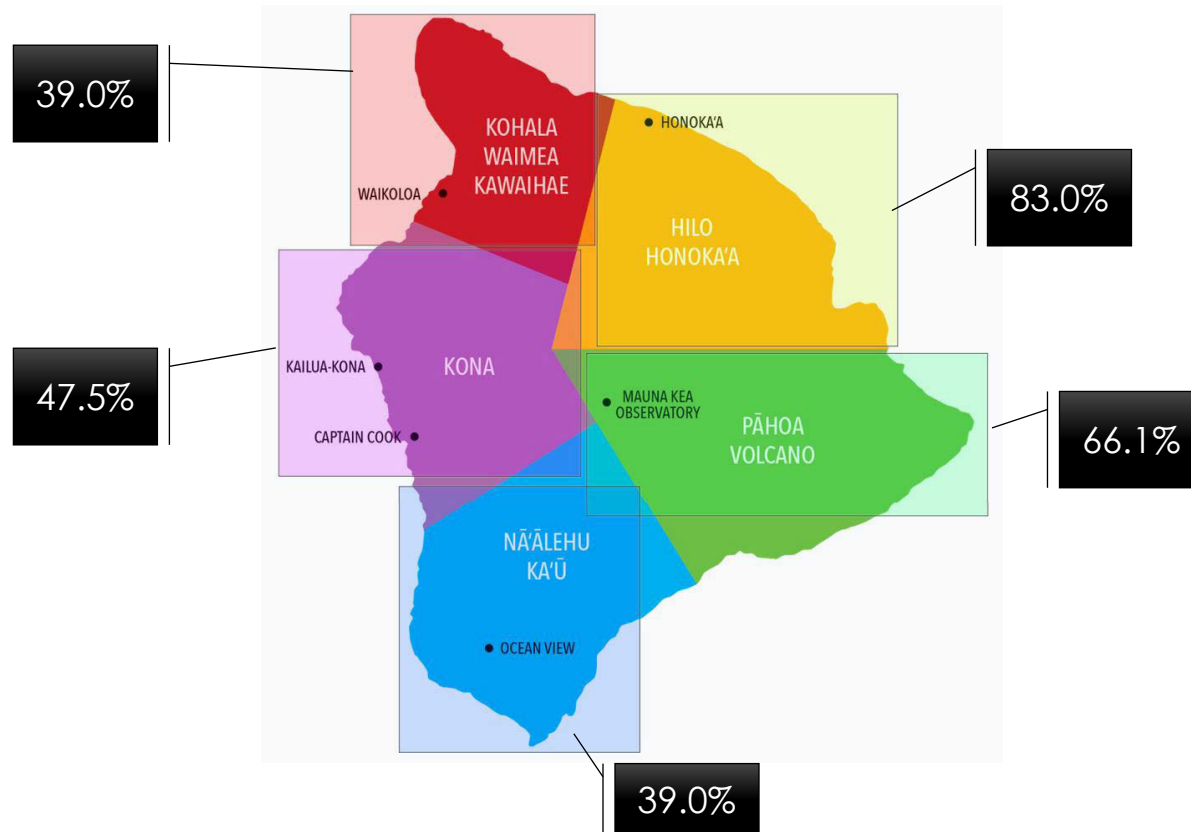
AREAS VISITED ISLAND OF HAWAI'I JAPAN



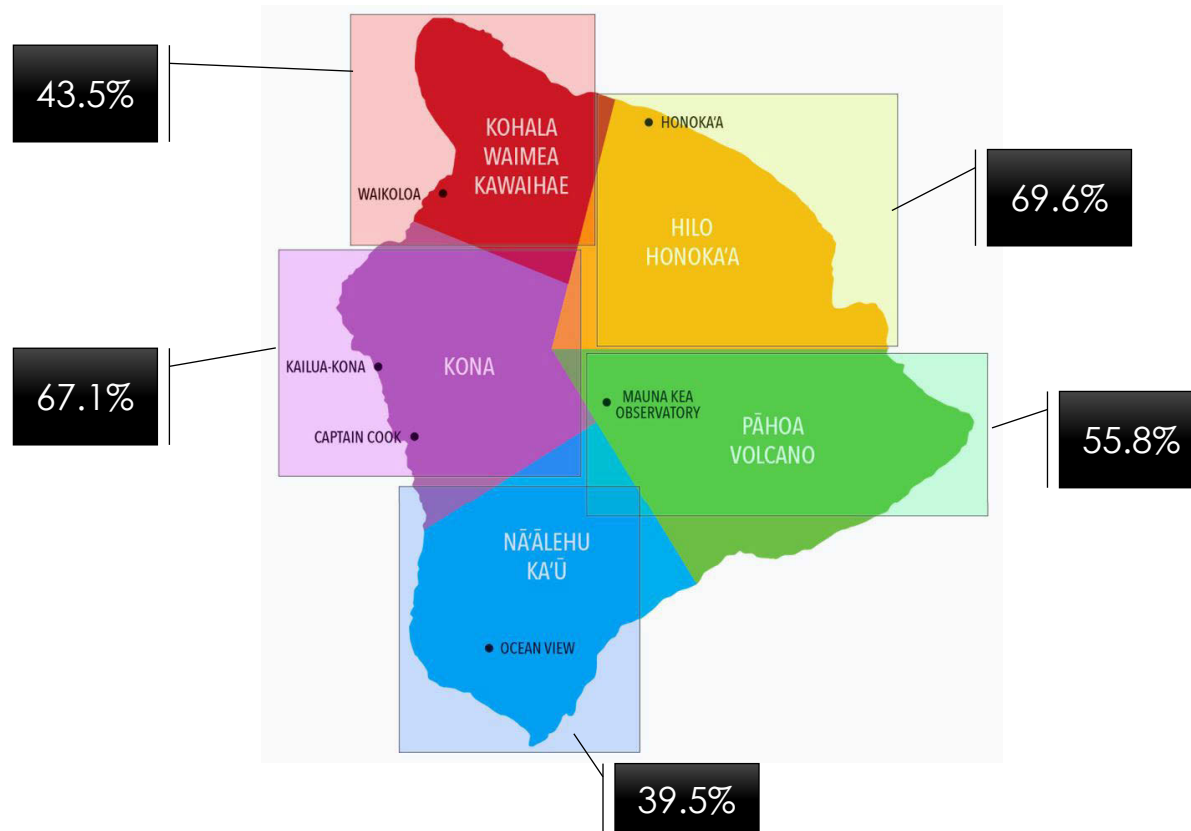
AREAS VISITED ISLAND OF HAWAI'I CANADA



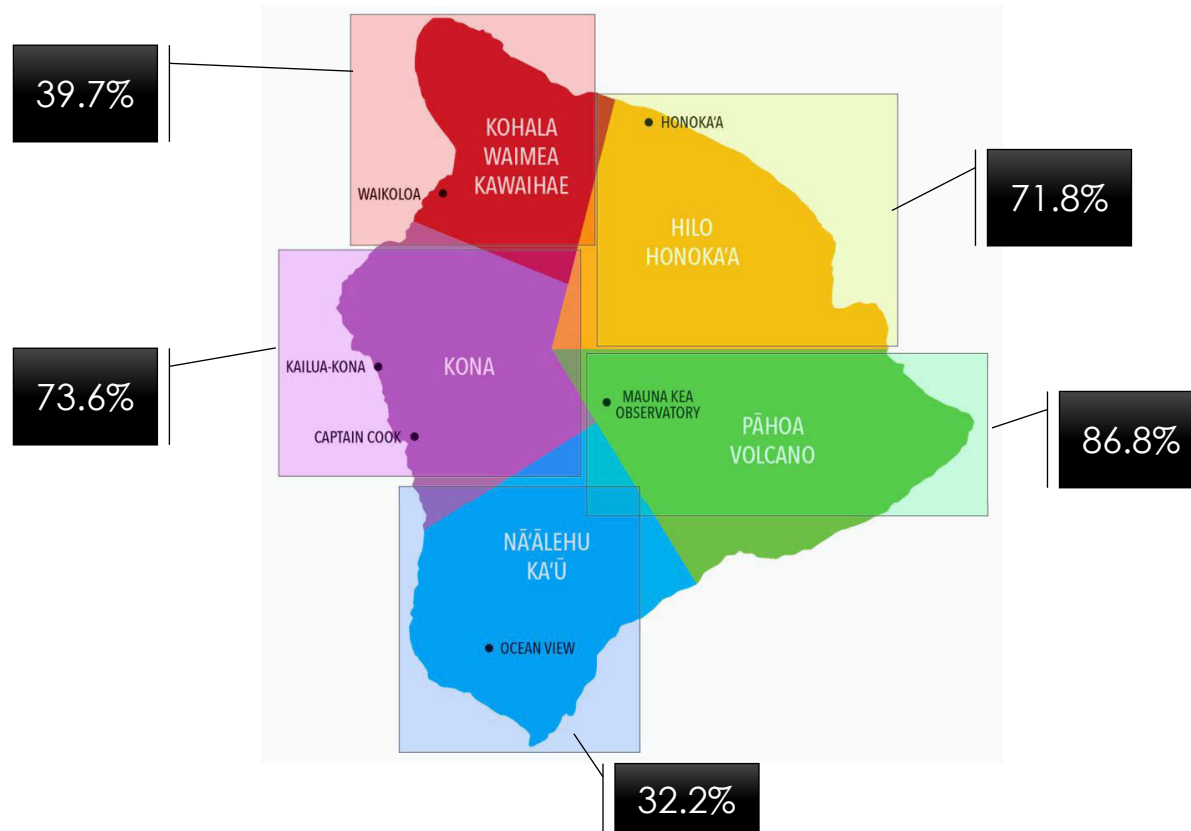
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



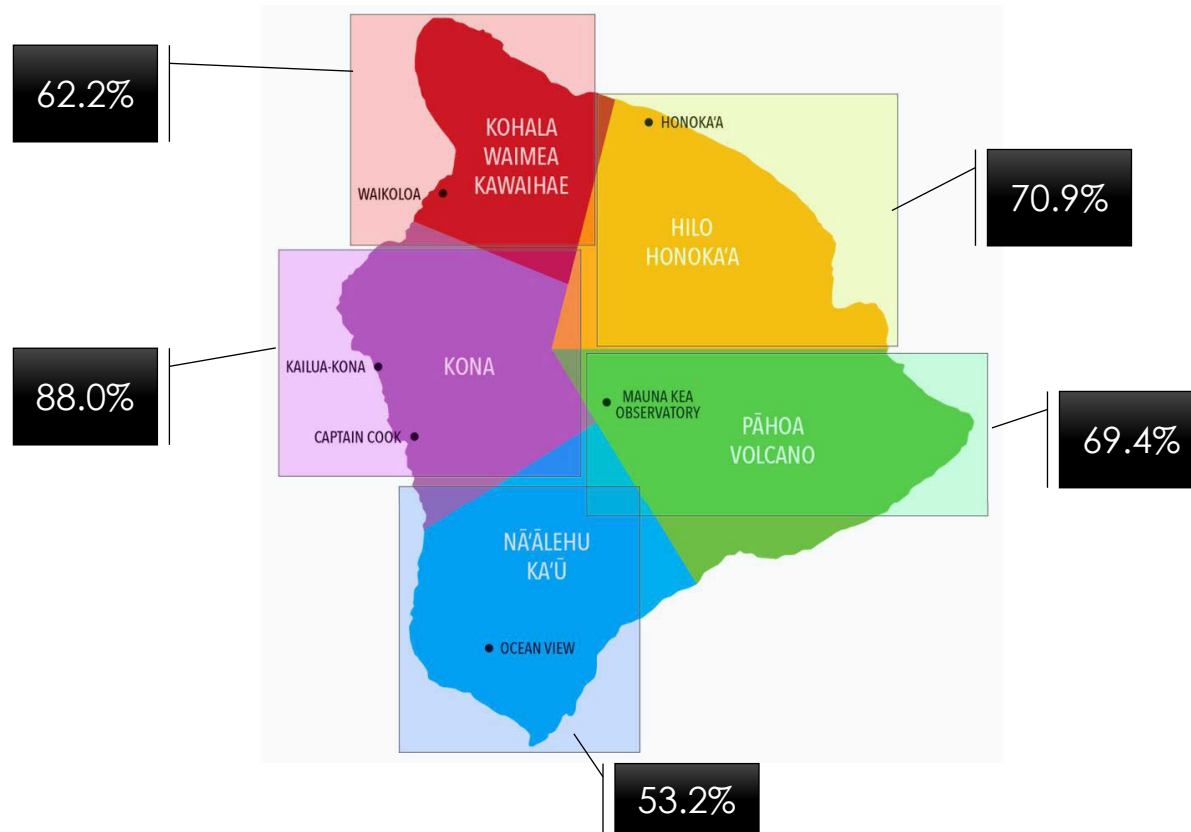
AREAS VISITED ISLAND OF HAWAI'I KOREA



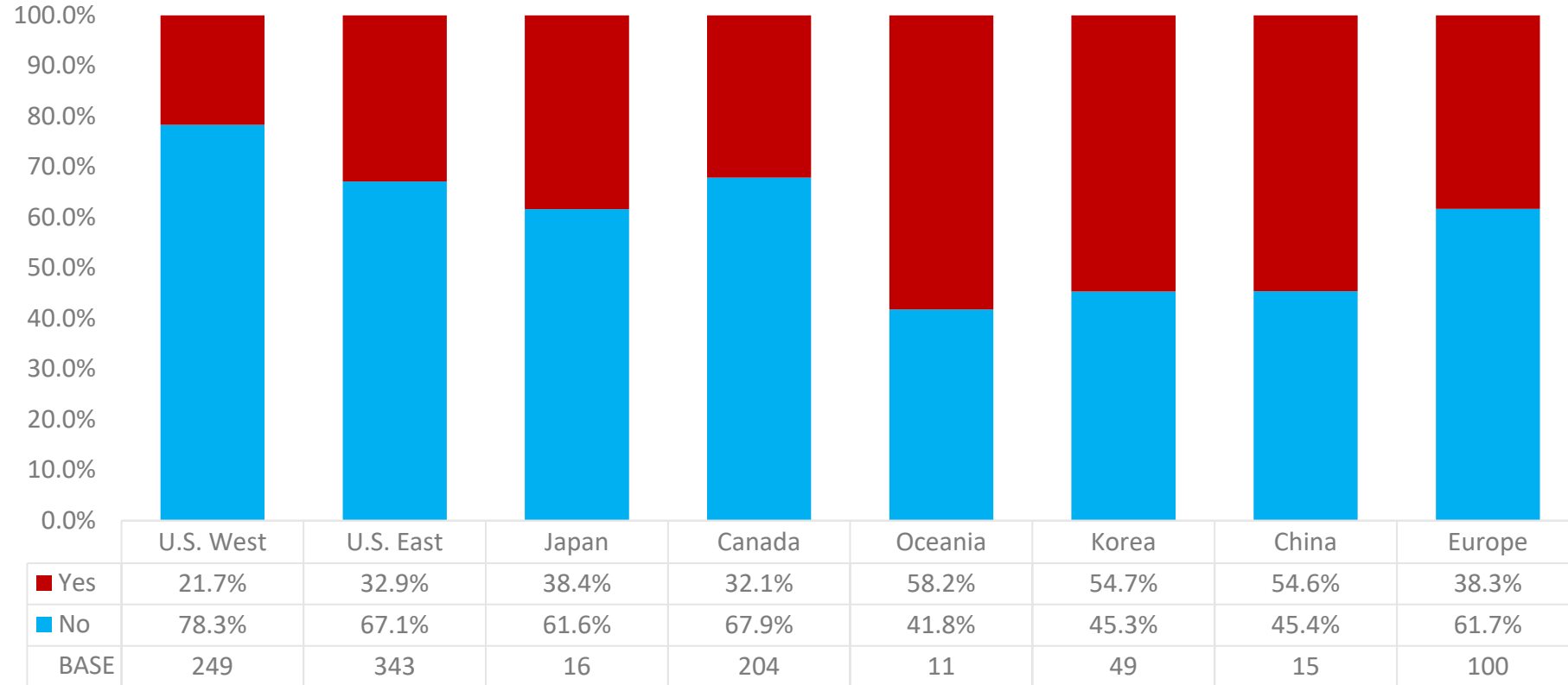
AREAS VISITED ISLAND OF HAWAI'I CHINA



AREAS VISITED ISLAND OF HAWAI'I EUROPE

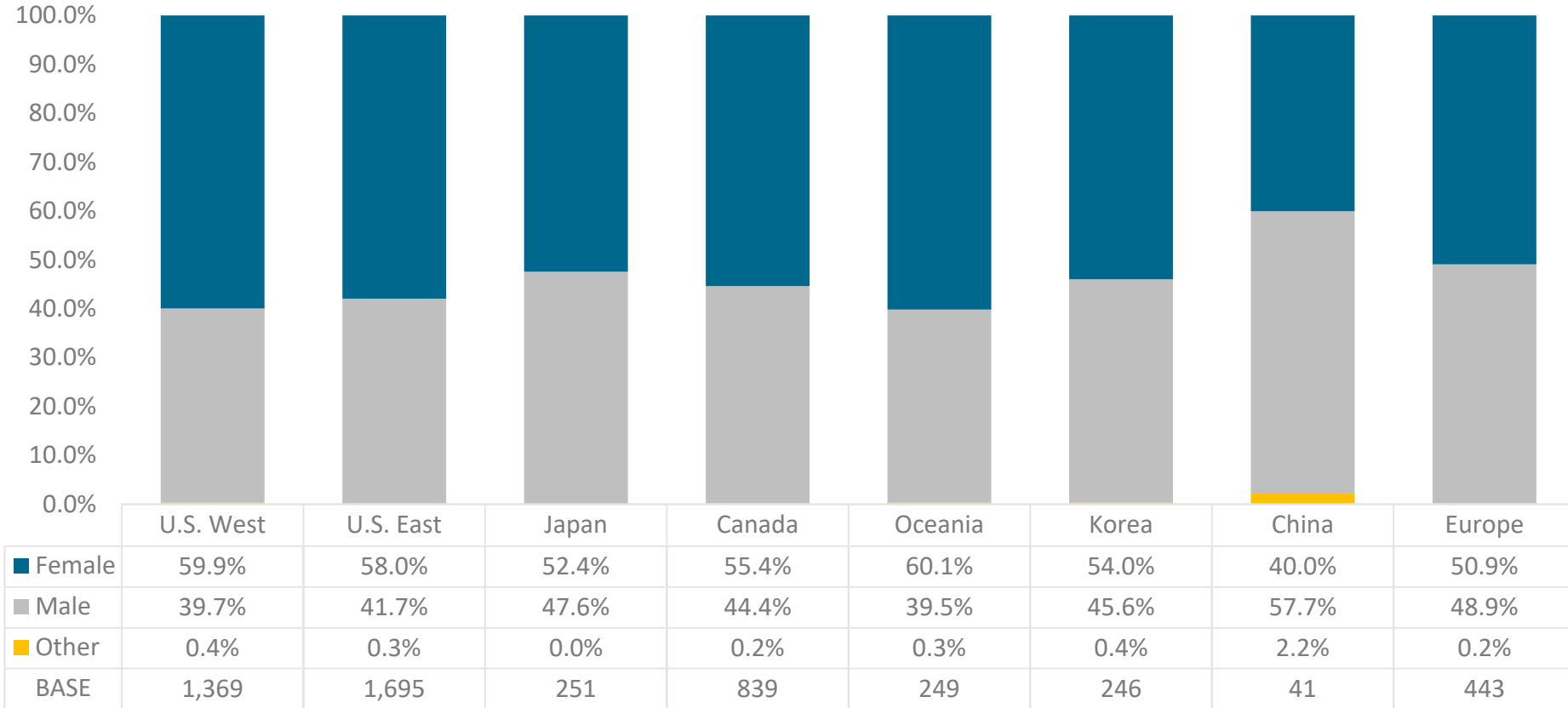


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

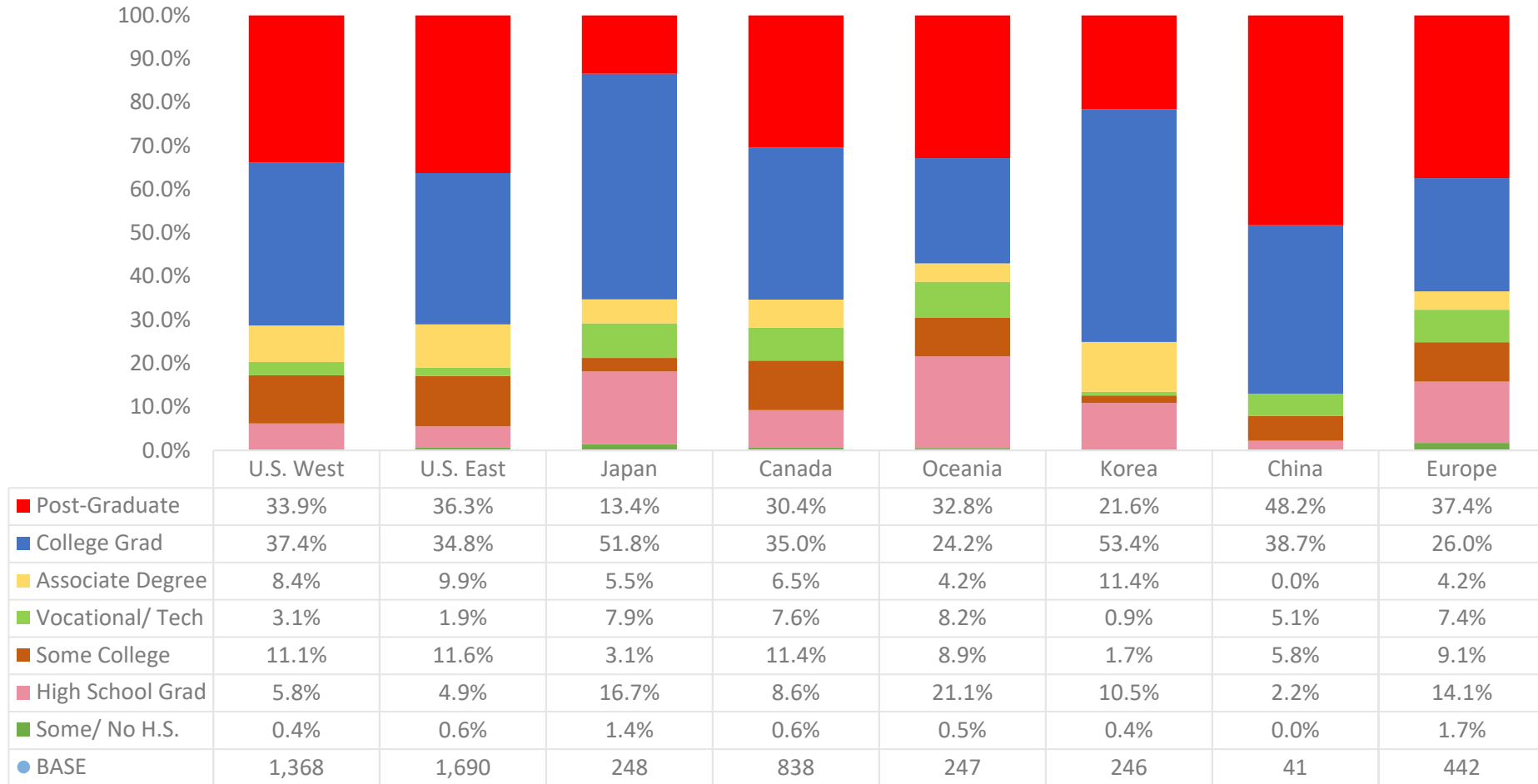


Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

| | U.S. West | U.S. East | Canada | Oceania | Europe |
|------------------------|-----------|-----------|--------|---------|--------|
| < \$40,000 | 5.1% | 4.2% | 4.3% | 10.7% | 13.8% |
| \$40,000 to \$59,999 | 5.4% | 6.3% | 6.2% | 8.1% | 12.1% |
| \$60,000 to \$79,999 | 7.7% | 7.9% | 7.8% | 6.4% | 12.0% |
| \$80,000 to \$99,999 | 9.1% | 8.5% | 10.2% | 9.0% | 12.7% |
| \$100,000 to \$124,999 | 11.6% | 12.3% | 15.5% | 12.6% | 10.0% |
| \$125,000 to \$149,999 | 10.4% | 12.5% | 12.2% | 11.0% | 10.7% |
| \$150,000 to \$174,999 | 9.6% | 8.3% | 8.3% | 8.6% | 7.6% |
| \$175,000 to \$199,999 | 6.6% | 5.9% | 9.8% | 10.5% | 5.0% |
| \$200,000 to \$249,999 | 11.3% | 11.1% | 9.5% | 4.7% | 7.8% |
| \$250,000 + | 23.4% | 23.0% | 16.1% | 18.4% | 8.4% |

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

| | Japanese |
|-----------------------|----------|
| < ¥3.5 million | 17.2% |
| ¥3.5 - ¥4.5 million | 10.4% |
| ¥4.5 - ¥5.5 million | 9.1% |
| ¥5.5 - ¥6.5 million | 5.6% |
| ¥6.5 - ¥7.5 million | 4.5% |
| ¥7.5 - ¥8.5 million | 5.1% |
| ¥8.5 - ¥10.0 million | 12.1% |
| ¥10.0 - ¥15.0 million | 20.4% |
| ¥15.0 - ¥20.0 million | 4.5% |
| ¥20.0 million + | 11.1% |

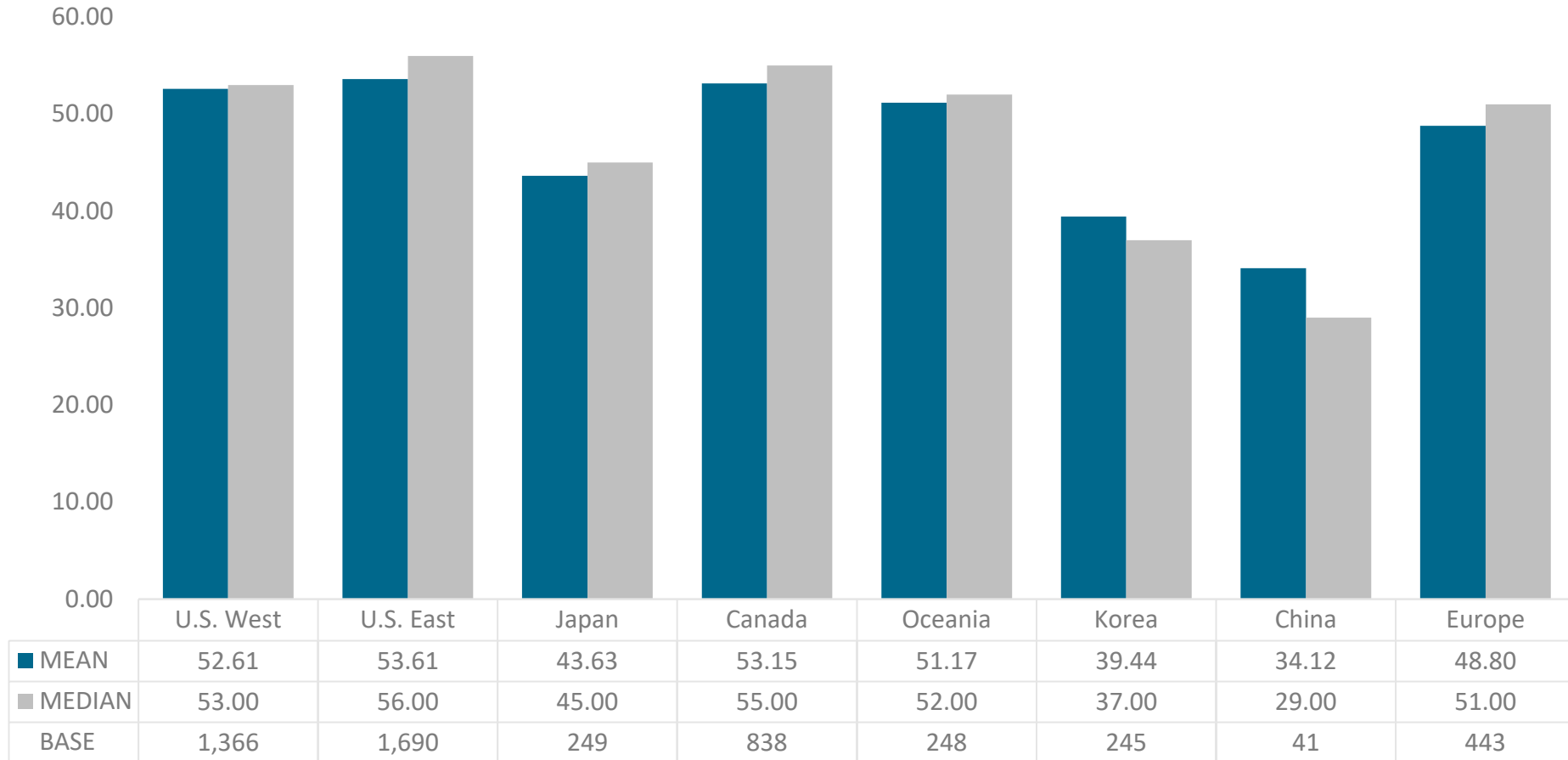
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

| | Korean |
|--------------------------|--------|
| < ₩16,305,000 | 7.5% |
| ₩16,305,000-27,173,999 | 4.3% |
| ₩27,174,000-38,041,999 | 9.6% |
| ₩38,042,000-48,911,999 | 8.0% |
| ₩48,912,000-59,781,999 | 11.4% |
| ₩59,782,000-70,652,999 | 9.0% |
| ₩70,653,000-81,520,999 | 12.2% |
| ₩81,521,000-92,390,999 | 10.5% |
| ₩92,391,000-103,259,999 | 7.8% |
| ₩103,260,000-149,999,999 | 6.4% |
| ₩150,000,000-199,999,999 | 4.5% |
| ₩200,000,000+ | 8.9% |

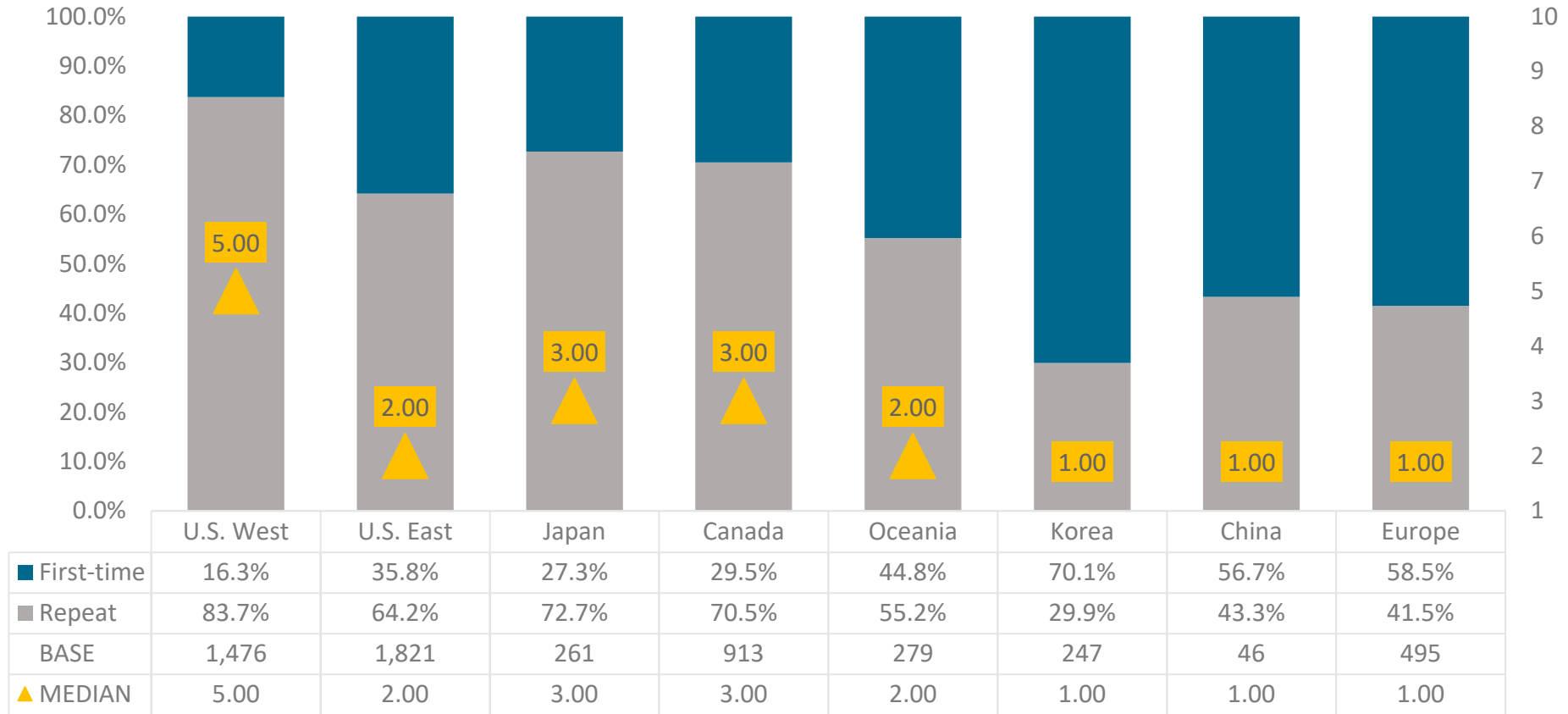
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

| | China |
|------------------------|-------|
| <¥250,799 | 10.6% |
| ¥250,800 – 376,099 | 16.3% |
| ¥376,100 – 501,399 | 8.9% |
| ¥501,400 – 626,799 | 14.8% |
| ¥626,800 – 783,499 | 7.4% |
| ¥783,500 – 940,199 | 4.9% |
| ¥940,200 – 1,096,899 | 9.6% |
| ¥1,096,900-1,253,599 | 3.2% |
| ¥1,253,600 – 1,560,799 | 2.5% |
| ¥1,560,800+ | 21.9% |

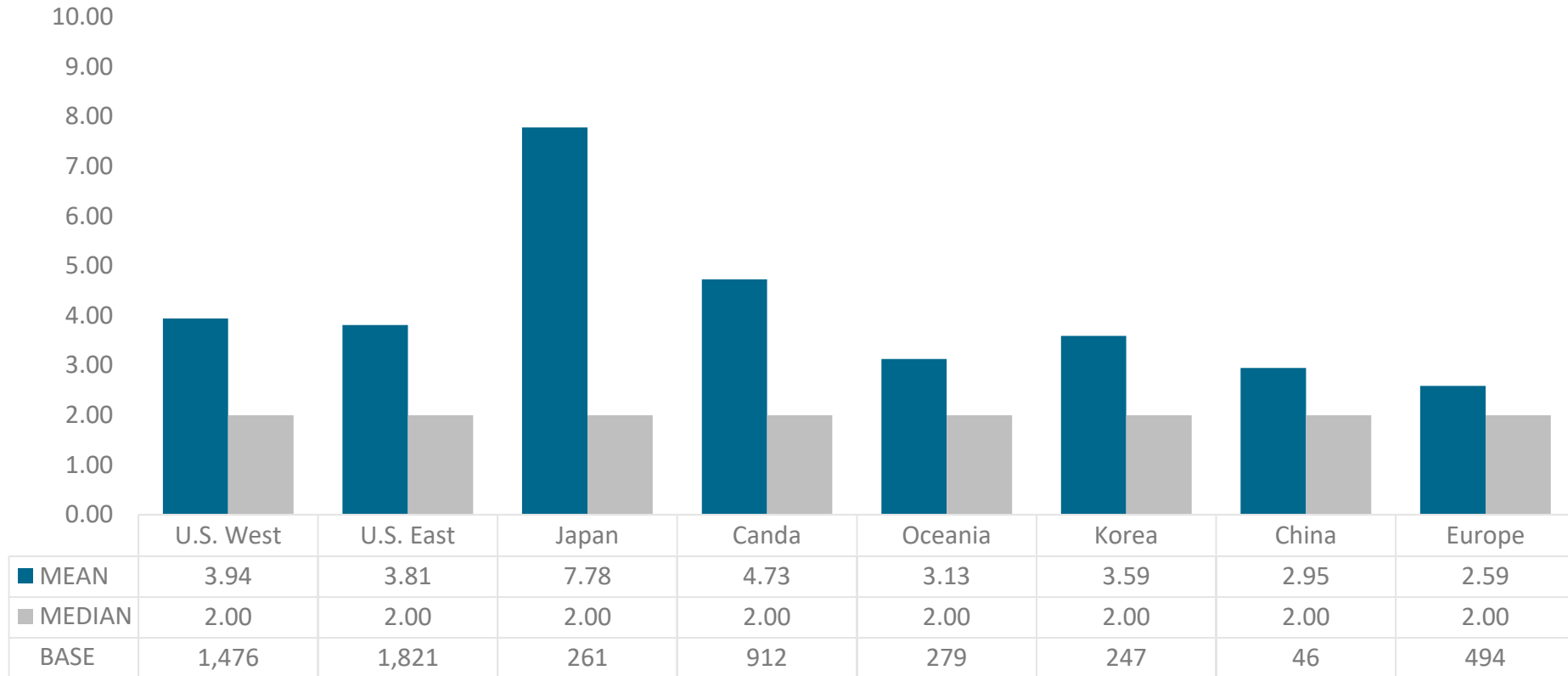
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

| | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| My spouse | 57.2% | 58.5% | 51.1% | 67.2% | 58.9% | 65.8% | 21.3% | 39.4% |
| Other adult members of my family | 26.1% | 25.2% | 34.6% | 29.7% | 25.0% | 21.8% | 20.6% | 16.1% |
| My child(ren)/ grandchild(ren) under 18 | 25.1% | 21.6% | 15.0% | 25.2% | 33.3% | 20.0% | 19.4% | 10.6% |
| My friends/ associates | 16.6% | 16.0% | 17.6% | 15.4% | 8.4% | 15.2% | 21.3% | 17.5% |
| Myself only (traveled alone/ no one else) | 11.4% | 12.2% | 10.2% | 7.3% | 16.4% | 5.2% | 26.6% | 20.5% |
| My girlfriend/ boyfriend | 7.1% | 5.4% | 1.8% | 4.0% | 2.9% | 2.0% | 19.2% | 11.0% |
| Same gender partner | 0.8% | 1.0% | 0.0% | 0.7% | 0.3% | 0.0% | 2.5% | 1.2% |

Section 10 – Island Survey Methodology

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT O'AHU

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

| MMA | Completed | Margin of Error± |
|-----------|-----------|------------------|
| U.S. West | 733 | 3.62 |
| U.S. East | 1,083 | 2.98 |
| Japan | 253 | 6.16 |
| Canada | 409 | 4.85 |
| Oceania | 269 | 5.98 |
| Korea | 226 | 6.52 |
| China | 39 | 15.69 |
| Europe | 367 | 5.12 |
| All MMAs | 3,379 | 1.69 |

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

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

| MMA | Completed | Margin of Error + |
|-----------|-----------|-------------------|
| U.S. West | 249 | 6.21 |
| U.S. East | 378 | 5.04 |
| Japan | 4 | 49.00 |
| Canada | 218 | 6.64 |
| Oceania | 11 | 29.55 |
| Korea | 11 | 29.55 |
| China | 1 | 98.00 |
| Europe | 103 | 9.66 |
| All MMAs | 975 | 3.14 |

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



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MAUI

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

| MMA | Completed | Margin of Error + |
|-----------|-----------|-------------------|
| U.S. West | 377 | 5.05 |
| U.S. East | 538 | 4.23 |
| Japan | 3 | 56.58 |
| Canada | 261 | 6.07 |
| Oceania | 17 | 23.77 |
| Korea | 17 | 23.77 |
| China | 5 | 43.83 |
| Europe | 146 | 8.11 |
| All MMAs | 1,364 | 2.65 |

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



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT ISLAND OF HAWAI'I

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

| MMA | Completed | Margin of Error + |
|-----------|-----------|-------------------|
| U.S. West | 273 | 5.93 |
| U.S. East | 447 | 4.64 |
| Japan | 16 | 24.50 |
| Canada | 254 | 6.15 |
| Oceania | 14 | 26.19 |
| Korea | 57 | 12.98 |
| China | 16 | 24.50 |
| Europe | 148 | 8.06 |
| All MMAs | 1,225 | 2.80 |

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

