

# VISITOR SATISFACTION STUDY QUARTER 2, 2024

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

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# 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 2, 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           | 1,644     | 2.42                  | 17.05         |
| U.S. East           | 1,788     | 2.32                  | 19.25         |
| Japan               | 394       | 4.94                  | 21.09         |
| Canada              | 864       | 3.33                  | 23.19         |
| Oceania             | 418       | 4.79                  | 20.25         |
| Korea               | 295       | 5.71                  | 43.26         |
| China               | 68        | 11.88                 | 6.59          |
| Europe              | 563       | 4.13                  | 16.25         |
| All visitor markets | 6,034     | 1.26                  | 19.00         |

# 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 2, 2024. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

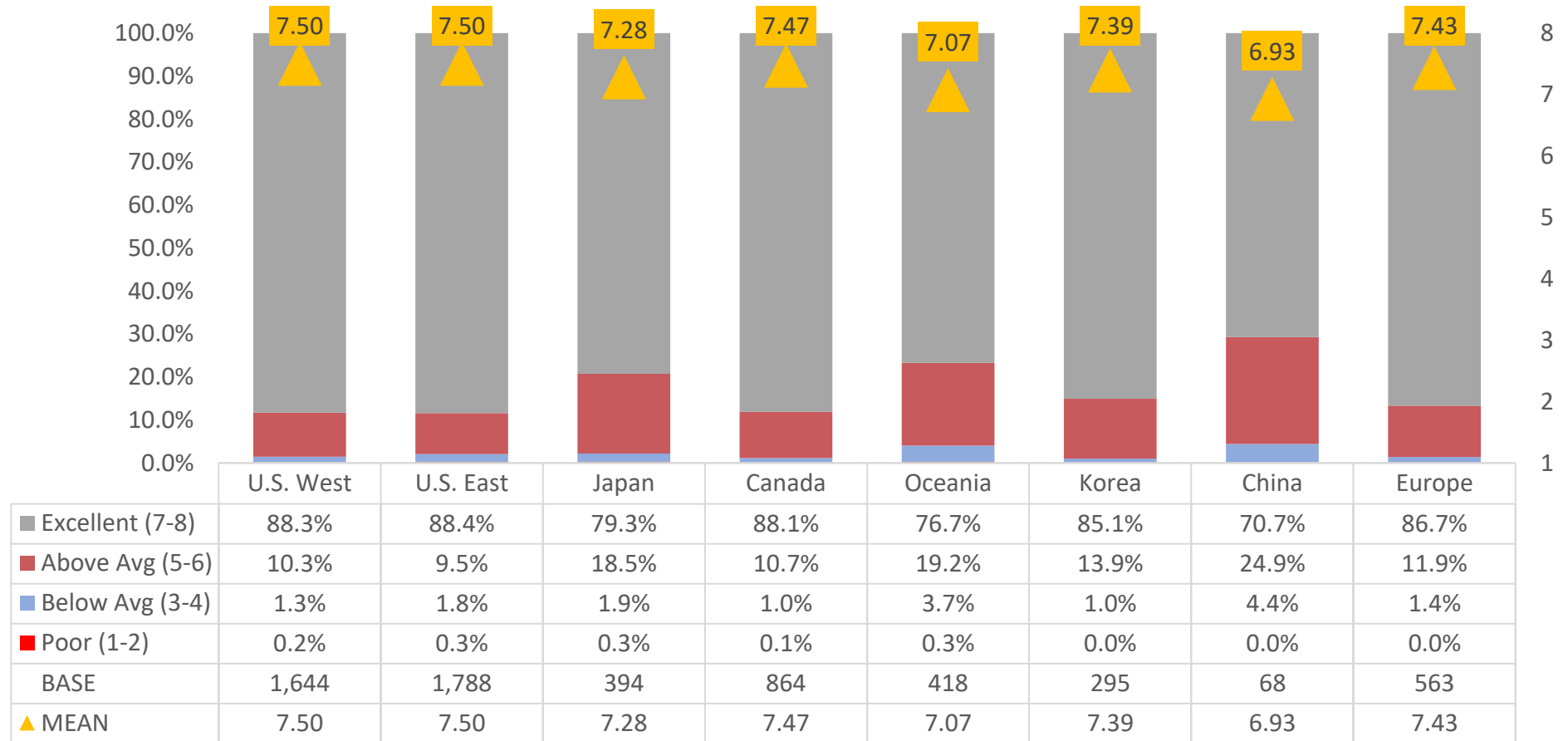
Data for 2024 are preliminary. Data for prior years reflect final visitor statistics from DBEDT Annual Visitor Research reports.

*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



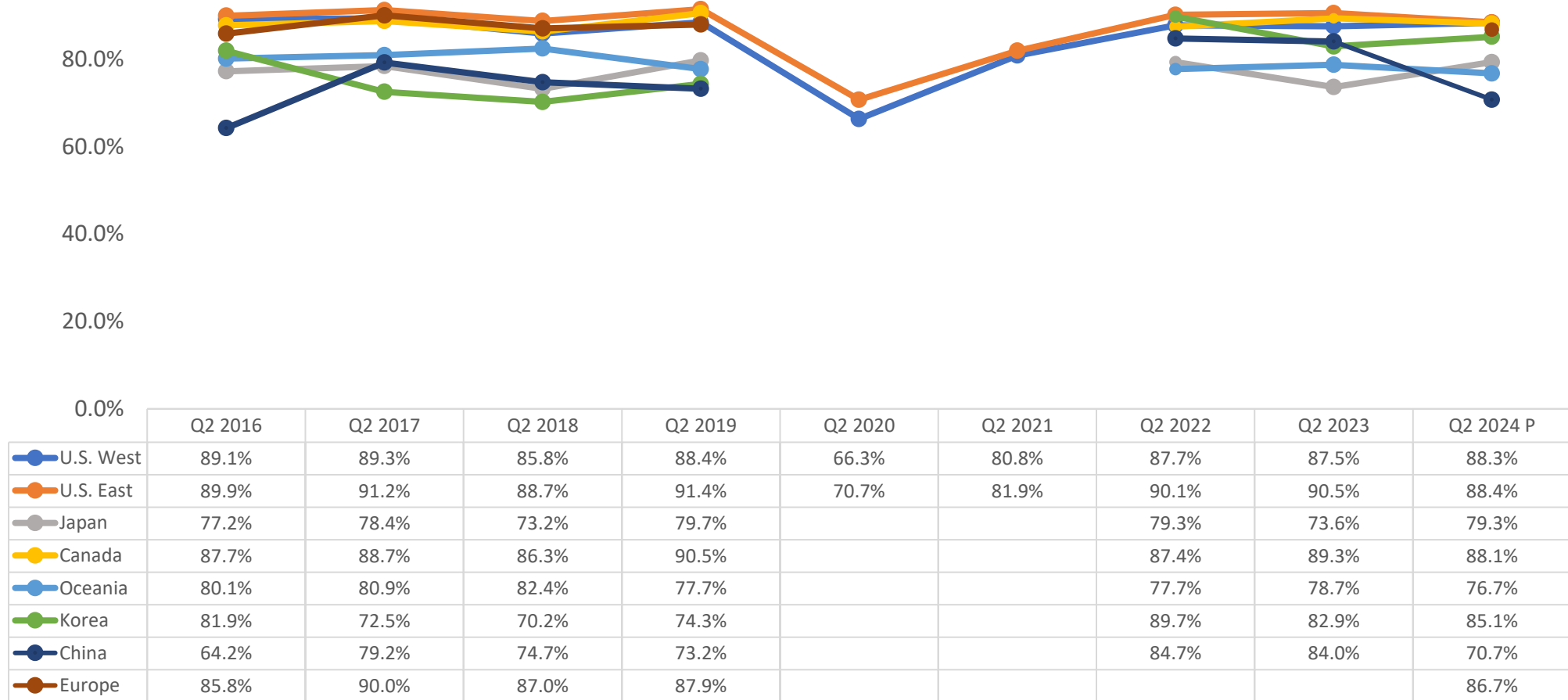
# SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Age:** Satisfaction was higher among younger visitors from **Japan** under the age of 35 compared to older respondents from this market.
- **Education:** Visitors from **U.S. West** without a college degree gave higher satisfaction scores for their trip than more educated segments from this market.
- **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%



P= Preliminary Data

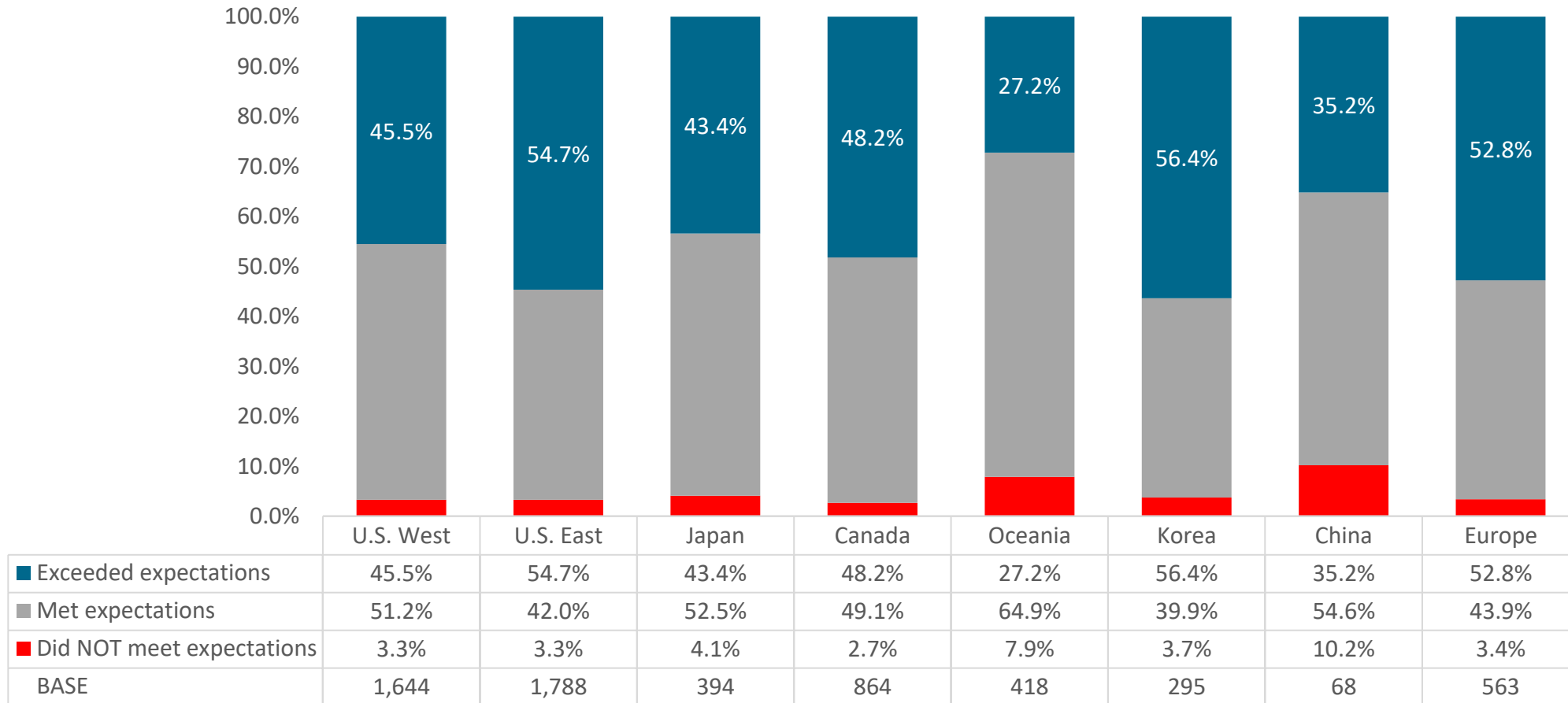
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on \_\_\_?

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

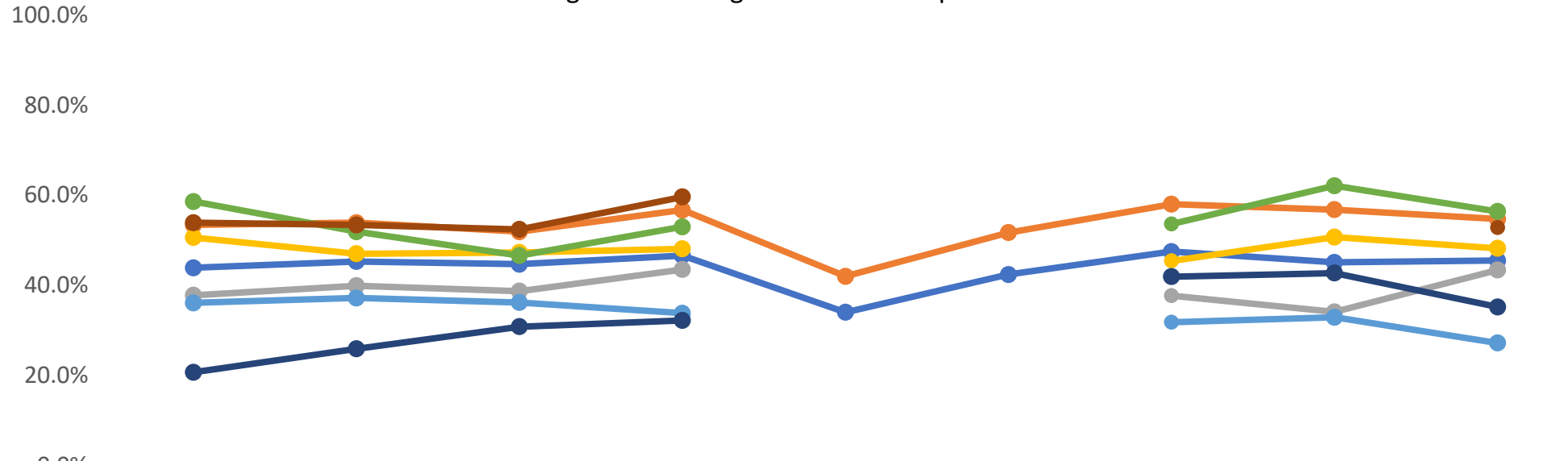


# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher scores than repeat visitors: **U.S. West, U.S. East, Oceania, Canada and Japan.**
- ***Age:*** Younger respondents from **U.S. West** (between 18 – 49 years old) , **U.S. East** (between 18 – 49 years old) and **Japan** (18 – 34 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.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



|           | Q2 2016 | Q2 2017 | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 43.9%   | 45.3%   | 44.7%   | 46.6%   | 34.0%   | 42.4%   | 47.5%   | 45.1%   | 45.5%     |
| U.S. East | 53.4%   | 53.9%   | 51.9%   | 56.7%   | 42.0%   | 51.7%   | 58.0%   | 56.8%   | 54.7%     |
| Japan     | 37.8%   | 39.9%   | 38.7%   | 43.5%   |         |         | 37.7%   | 34.1%   | 43.4%     |
| Canada    | 50.6%   | 47.0%   | 47.3%   | 48.1%   |         |         | 45.4%   | 50.7%   | 48.2%     |
| Oceania   | 36.1%   | 37.2%   | 36.2%   | 33.8%   |         |         | 31.8%   | 32.9%   | 27.2%     |
| Korea     | 58.6%   | 51.9%   | 46.6%   | 53.0%   |         |         | 53.6%   | 62.1%   | 56.4%     |
| China     | 20.7%   | 25.9%   | 30.8%   | 32.2%   |         |         | 41.9%   | 42.7%   | 35.2%     |
| Europe    | 53.9%   | 53.4%   | 52.4%   | 59.6%   |         |         |         |         | 52.8%     |

P= Preliminary Data

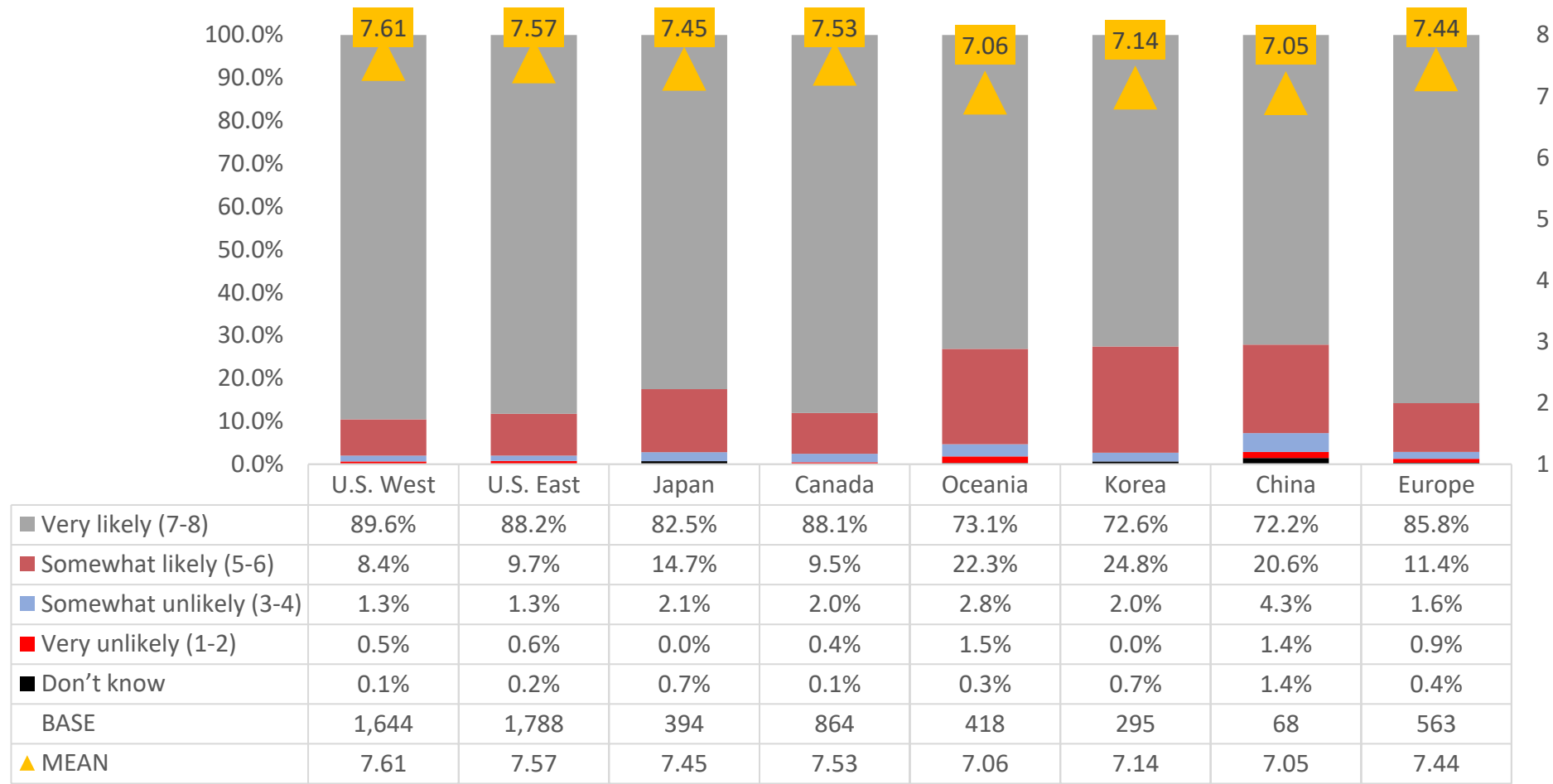
Q. Would you say this trip to Hawai'i \_\_\_?

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



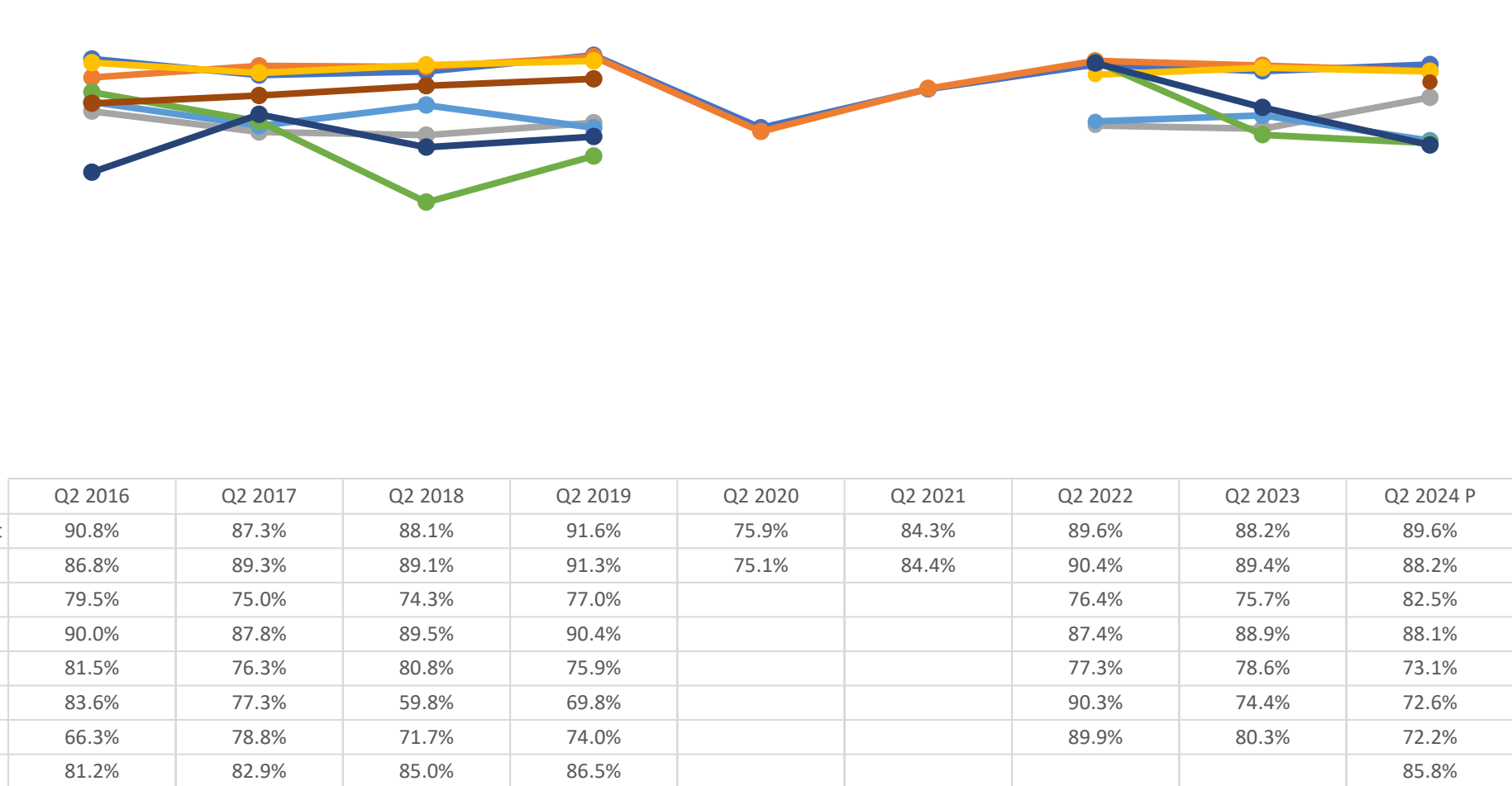
# BRAND/ DESTINATION - ADVOCACY

- **Gender:** Female respondents from **U.S. West** and **U.S. East** were more likely to recommend the state to others than male respondents from these visitor markets.
- **Education:** Visitors from **U.S. West** and **Japan** without a college degree were more likely to recommend the state compared to college graduates.
- **Trips to Hawai'i:** Repeat visitors from **U.S. West** and **U.S. East** were more likely to recommend the state to others compared to first-time visitors. First-time visitors from **Japan** were more likely to recommend the state to others than repeat visitors.
- **Age:** Seniors from **Japan** were the least likely to recommend the state to others.

# BRAND/ DESTINATION - ADVOCACY

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

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



P= Preliminary Data

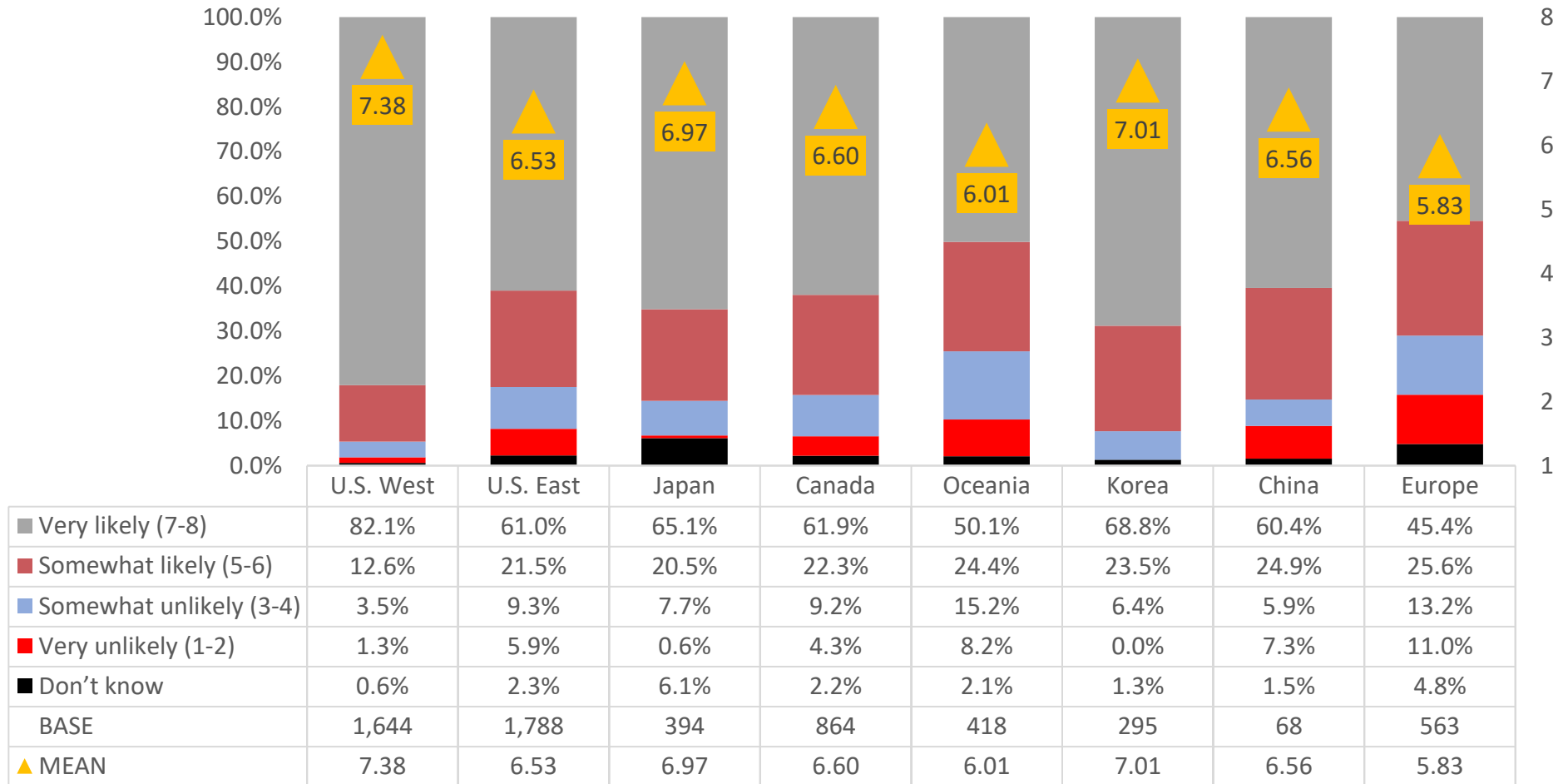
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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



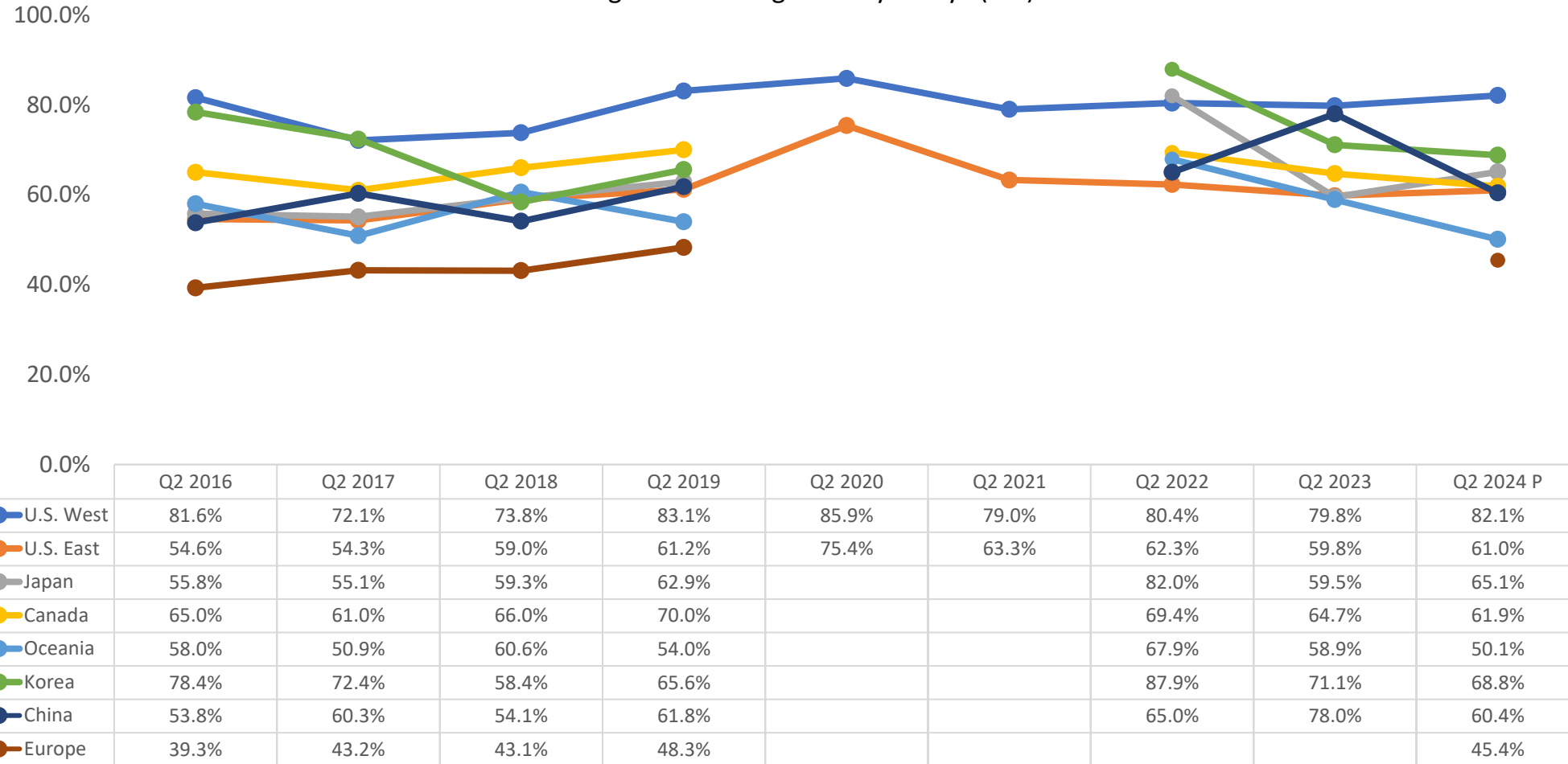
# LIKELIHOOD OF RETURN VISIT

- **Gender:** Female respondents from **U.S. West** expressed a greater likelihood to return to Hawai'i than male respondents.
- **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. West** 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** and **Japan** between the ages 18-34 years old expressed the least likelihood of returning than other age groups from these visitor markets. Younger visitors from **U.S. East** under 50 appear more likely to return to the state.
- **Travel party size:** Those from **U.S. East** who traveled to the state by themselves 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)



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

| Q2 2023                                 | Q2 2024 P                               |
|---|---|
| 61.6% Too expensive                     | 63.6% Too expensive                     |
| 42.6% Want to go someplace new          | 30.6% Poor value                        |
| 34.2% Poor value                        | 29.4% Want to go someplace new          |
| 31.1% Too crowded/ congested/ traffic   | 18.2% Five years is too soon            |
| 17.0% Too commercialized/ overdeveloped | 18.1% Too crowded/ congested/ traffic   |
| 15.2% Five years is too soon            | 18.1% No compelling reason to return    |
| 13.1% Unfriendly people/ felt unwelcome | 16.9% Too commercialized/ overdeveloped |
| 11.0% No compelling reason to return    | 14.8% Flight too long                   |
|   | 11.4% Unfriendly people/ felt unwelcome |

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS U.S. EAST

| Q2 2023                               | Q2 2024 P                             |
|---------------------------------------|---------------------------------------|
| 59.6% Too expensive                   | 54.4% Too expensive                   |
| 44.6% Flight too long                 | 39.7% Want to go someplace new        |
| 36.9% Want to go someplace new        | 39.2% Flight too long                 |
| 21.0% Five years is too soon          | 18.1% Poor value                      |
| 16.0% Poor value                      | 17.0% Five years is too soon          |
| 15.0% Too crowded/ congested/ traffic | 16.6% Other financial obligations     |
| 10.5% Other financial obligations     | 14.2% Too crowded/ congested/ traffic |
|                                       | 11.9% No compelling reason to return  |

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS JAPAN

| Q2 2023*                              | Q2 2024 P**                       |
|---------------------------------------|-----------------------------------|
| 79.1% Too expensive                   | 61.3% Too expensive               |
| 31.5% Want to go someplace new        | 38.1% Five years is too soon      |
| 26.1% Five years is too soon          | 25.8% Want to go someplace new    |
| 20.9% Other financial obligations     | 21.5% Other financial obligations |
| 15.8% Poor value                      | 13.4% Flight too long             |
| 10.6% Poor health/ age                | 10.8% Poor health/ age            |
| 10.4% Too crowded/ congested/ traffic |                                   |
| 10.4% No compelling reason to return  |                                   |

\*Caution small base (n=19 respondents) in Q2 2023.

\*\*Caution small base (n=52 respondents) in Q2 2024.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

| Q2 2023                               | Q2 2024 P                            |
|---------------------------------------|--------------------------------------|
| 54.4% Too expensive                   | 60.1% Too expensive                  |
| 41.3% Want to go someplace new        | 43.0% Want to go someplace new       |
| 35.6% Flight too long                 | 26.1% Flight too long                |
| 18.7% Five years is too soon          | 22.3% Five years is too soon         |
| 15.7% Poor value                      | 17.8% Other financial obligations    |
| 13.7% Other financial obligations     | 17.8% Poor value                     |
| 10.4% Too crowded/ congested/ traffic | 11.1% No compelling reason to return |

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS OCEANIA

| Q2 2023                                 | Q2 2024 P                               |
|---|---|
| 50.1% Too expensive                     | 61.7% Too expensive                     |
| 36.4% Want to go someplace new          | 34.8% Want to go someplace new          |
| 26.7% Poor value                        | 33.6% Poor value                        |
| 21.5% Too commercialized/ overdeveloped | 25.3% Too commercialized/ overdeveloped |
| 16.6% No compelling reason to return    | 19.0% No compelling reason to return    |
| 12.6% Five years is too soon            | 18.2% Too crowded/ congested/ traffic   |
| 10.4% Too crowded/ congested/ traffic   | 13.4% Other financial obligations       |
| 10.1% Flight is too long                | 11.5% Flight too long                   |

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS KOREA

| Q2 2023*                              | Q2 2024 P**                             |
|---------------------------------------|---|
| 77.8% Too expensive                   | 78.4% Too expensive                     |
| 36.6% Flight too long                 | 34.6% Want to go someplace new          |
| 36.0% Poor value                      | 30.5% Poor value                        |
| 25.9% No compelling reason to return  | 25.9% Flight too long                   |
| 25.4% Other financial obligations     | 17.6% Other financial obligations       |
| 24.5% Five years is too soon          | 13.2% Five years is too soon            |
| 21.3% Want to go someplace new        | 13.2% Too commercialized/ overdeveloped |
| 13.0% Too crowded/ congested/ traffic | 13.0% No compelling reason to return    |

\*Caution small base (n=39 respondents) in Q2 2023.

\*\*Caution small base (n=23 respondents) in Q2 2024.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CHINA

| Q2 2023*                                | Q2 2024 P**                               |
|---|---|
| 25.0% Too expensive                     | 49.7% Too expensive                       |
| 25.0% Flight too long                   | 49.7% Poor value                          |
| 25.0% Poor value                        | 30.1% Want to go someplace new            |
| 25.0% Too commercialized/ overdeveloped | 20.2% No compelling reason to return      |
| 25.0% Other financial obligations       | 20.2% Five years is too soon              |
| 25.0% No compelling reason to return    | 20.2% Unfriendly people/ felt unwelcome   |
| 25.0% Crime/ safety concern             | 20.2% Too commercialized/ overdeveloped   |
| 25.0% Airport/ immigration issue        | 20.2% Flight too long                     |
|   | 10.4% No time/ too busy/ no vacation time |

\*Caution small base (n=4 respondent) in Q2 2023.

\*\*Caution small base (n=10 respondents) in Q2 2024.

P= Preliminary Data



# UNLIKELY TO RETURN - TOP REASONS EUROPE

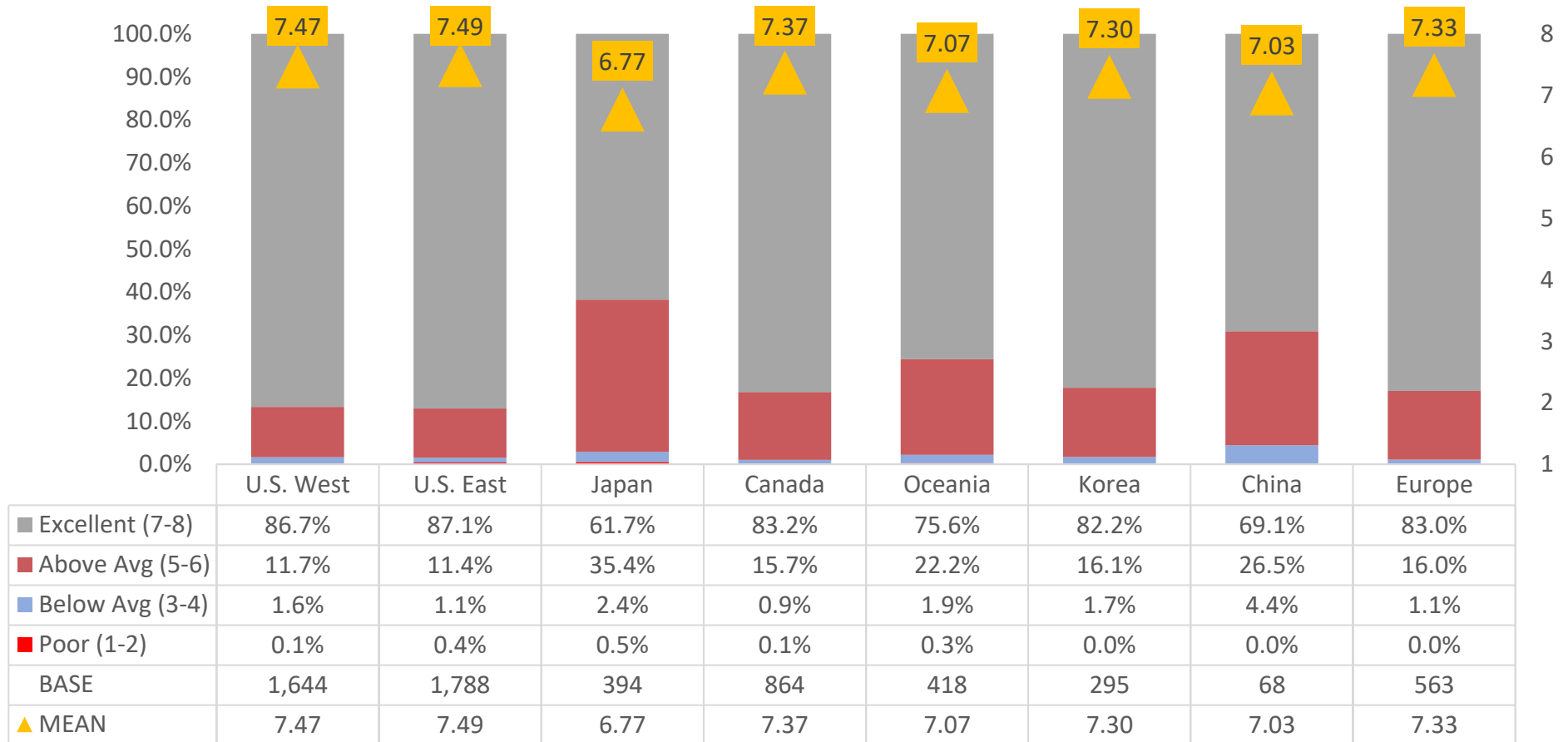
| Q2 2019*                                | Q2 2024 P                               |
|---|---|
| 62.5% Flight too long                   | 65.0% Flight too long                   |
| 52.2% Too expensive                     | 53.4% Too expensive                     |
| 37.2% Want to go someplace new          | 31.3% Want to go someplace new          |
| 16.4% Five years is too soon            | 22.7% Five years is too soon            |
| 14.0% Poor value                        | 16.0% Other financial obligations       |
| 13.1% No compelling reason to return    | 15.9% Poor value                        |
| 13.0% Too commercialized/ overdeveloped | 10.4% Too commercialized/ overdeveloped |
| 10.4% Other financial obligations       |   |

\*No data collected from 2020 thru 2023.

P= Preliminary Data

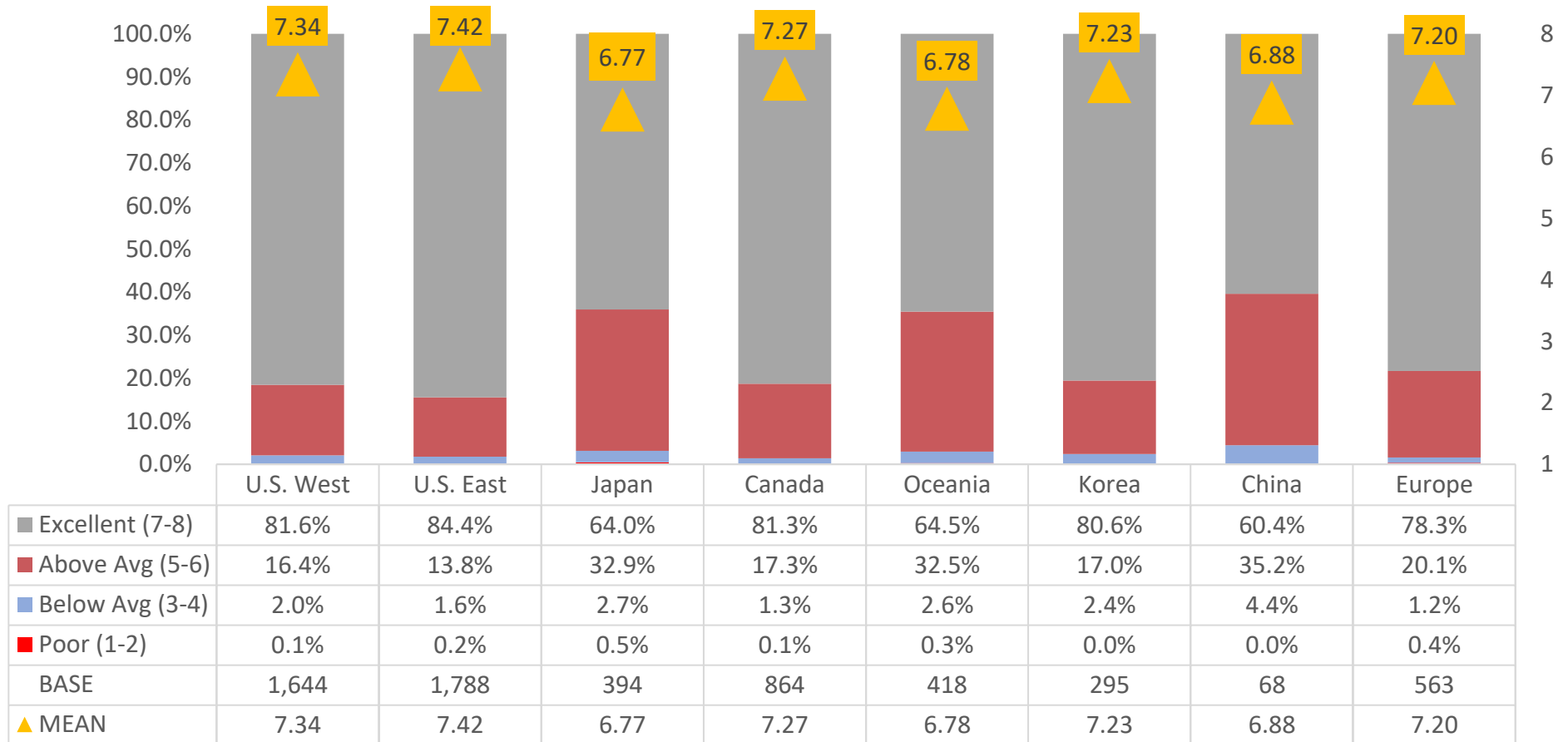
# OFFERING A VARIETY OF EXPERIENCES

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



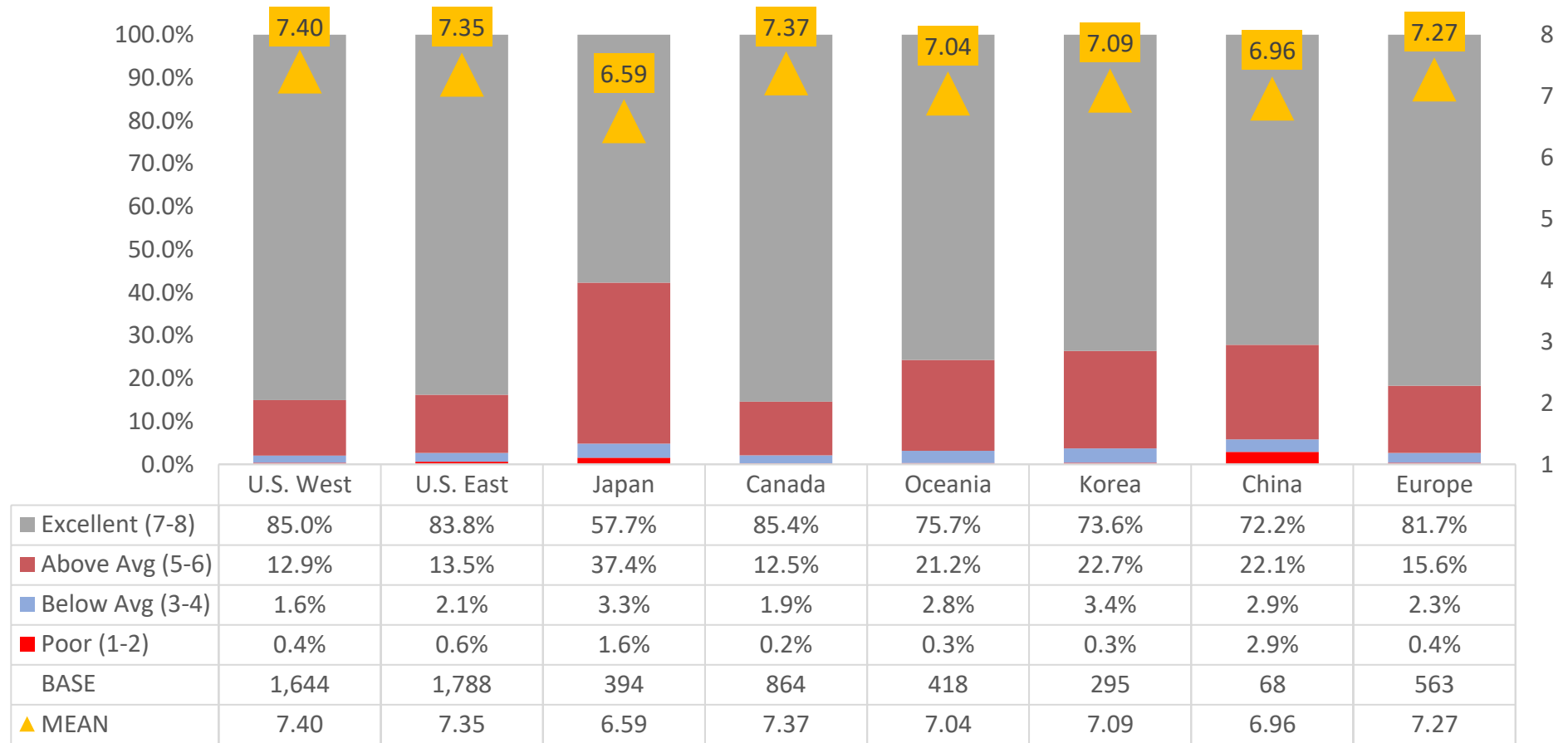
# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



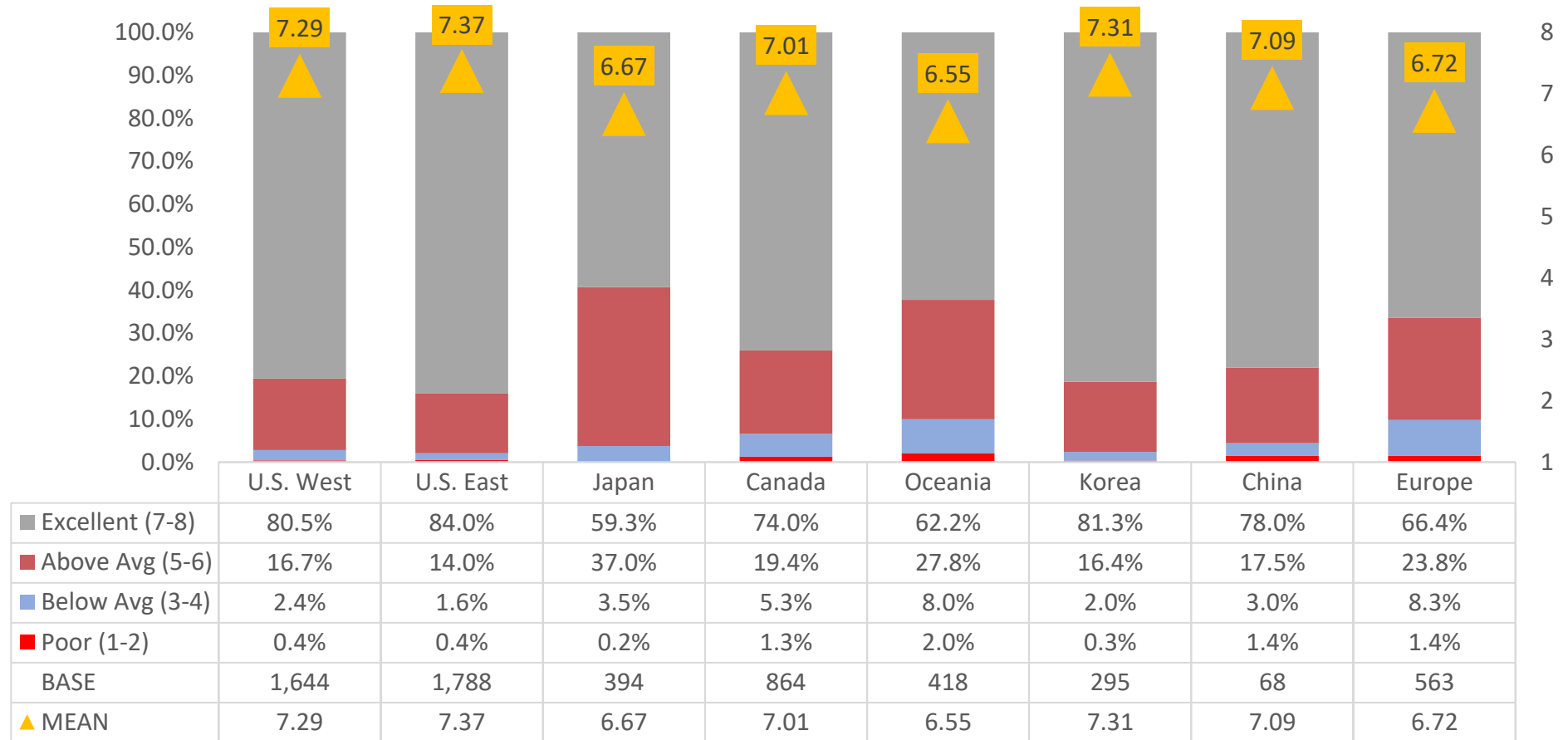
# SAFE AND SECURE DESTINATION

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



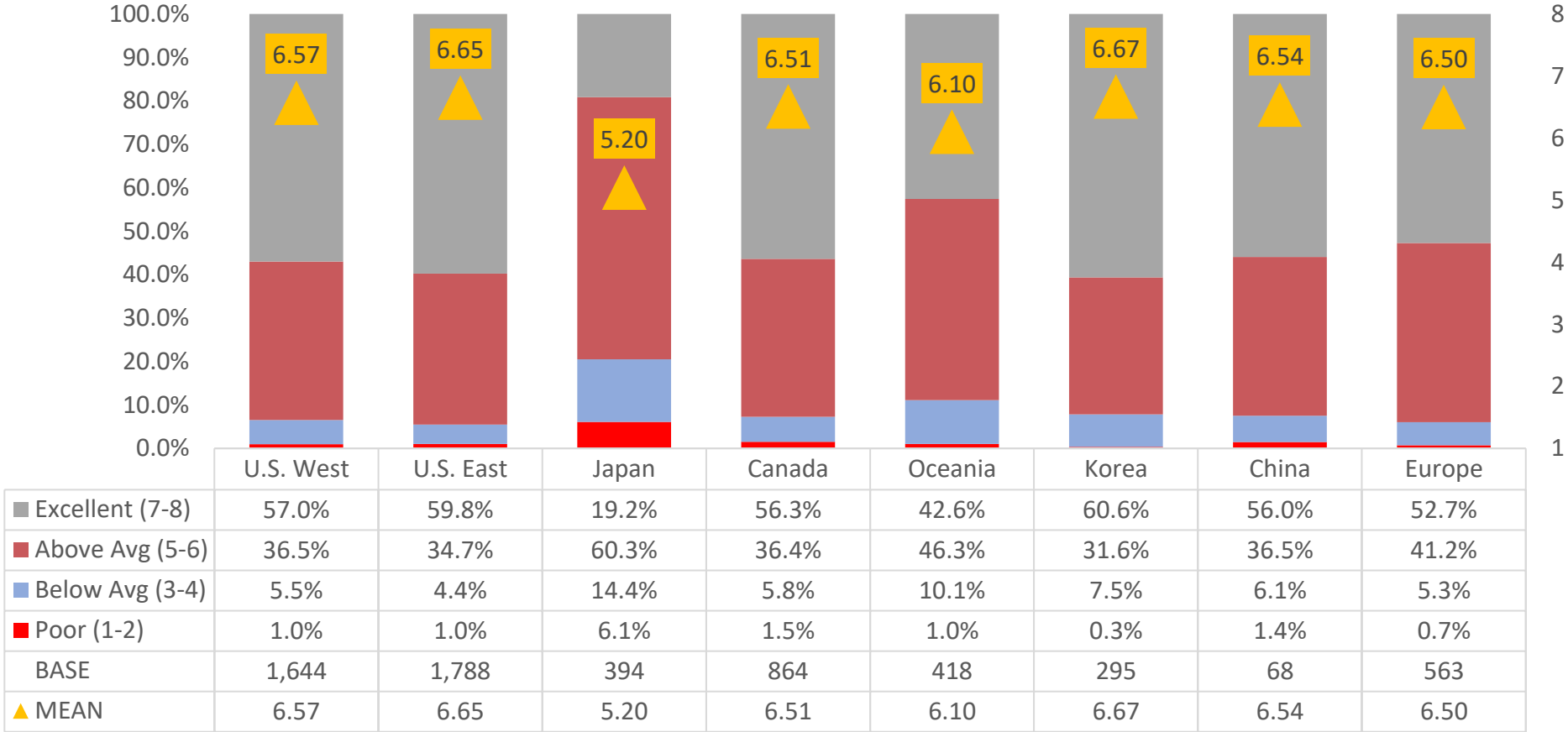
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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 |
|--|-----------|-----------|-------|--------|---------|-------|--------|--------|
| <b>TOTAL</b>                                       | 98.0%     | 98.5%     | 97.7% | 98.4%  | 94.3%   | 98.2% | 100.0% | 99.8%  |
| <b>On own (self-guided)/ driving around island</b> | 84.4%     | 81.7%     | 72.6% | 79.3%  | 48.9%   | 80.4% | 75.7%  | 72.0%  |
| <b>Helicopter ride/ airplane tour</b>              | 2.8%      | 6.8%      | 0.3%  | 4.6%   | 3.8%    | 5.1%  | 5.0%   | 11.9%  |
| <b>Boat tour/ submarine ride/ whale watching</b>   | 22.1%     | 31.0%     | 7.9%  | 22.9%  | 19.0%   | 31.6% | 19.4%  | 22.1%  |
| <b>Visit towns/ communities</b>                    | 54.5%     | 55.7%     | 37.4% | 55.7%  | 30.6%   | 37.5% | 40.4%  | 42.9%  |
| <b>Private limousine/ van tour/ tour bus</b>       | 7.5%      | 16.4%     | 16.9% | 14.1%  | 33.3%   | 12.0% | 11.2%  | 17.2%  |
| <b>Scenic views/ natural landmarks</b>             | 59.2%     | 69.0%     | 22.4% | 65.2%  | 53.0%   | 61.3% | 75.8%  | 64.7%  |
| <b>Movie/ TV/ film location tours</b>              | 5.8%      | 7.7%      | 4.4%  | 6.5%   | 8.9%    | 20.2% | 16.0%  | 10.2%  |



# ACTIVITIES - RECREATION

|   | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                              | 95.8%     | 95.9%     | 97.1% | 97.9%  | 93.9%   | 96.9% | 96.8% | 95.8%  |
| <b>Beach/ sunbathing</b>                  | 84.6%     | 83.1%     | 71.7% | 86.8%  | 78.8%   | 84.6% | 80.8% | 85.1%  |
| <b>Bodyboarding</b>                       | 10.2%     | 6.0%      | 0.2%  | 9.4%   | 4.2%    | 3.4%  | 8.1%  | 7.4%   |
| <b>Standup paddle boarding</b>            | 4.0%      | 3.5%      | 2.5%  | 3.6%   | 2.8%    | 5.5%  | 6.4%  | 4.5%   |
| <b>Surfing</b>                            | 5.7%      | 6.7%      | 3.1%  | 7.3%   | 6.5%    | 10.1% | 9.8%  | 11.7%  |
| <b>Canoe paddling</b>                     | 1.1%      | 0.9%      | 0.3%  | 1.4%   | 0.4%    | 2.8%  | 3.2%  | 1.5%   |
| <b>Kayaking</b>                           | 4.9%      | 4.9%      | 1.1%  | 4.3%   | 1.7%    | 5.5%  | 4.9%  | 2.6%   |
| <b>Swimming in the ocean</b>              | 63.2%     | 62.1%     | 35.6% | 66.9%  | 61.6%   | 46.2% | 40.8% | 69.0%  |
| <b>Snorkeling</b>                         | 43.0%     | 40.1%     | 10.3% | 42.8%  | 27.6%   | 51.9% | 32.5% | 39.2%  |
| <b>Freediving</b>                         | 1.8%      | 1.2%      | 0.8%  | 1.2%   | 0.5%    | 1.4%  | 8.2%  | 0.8%   |
| <b>Windsurfing/ Kitesurfing</b>           | 0.3%      | 0.1%      | 0.0%  | 0.5%   | 0.2%    | 0.7%  | 1.6%  | 0.9%   |
| <b>Jet skiing/ Parasailing</b>            | 1.5%      | 1.6%      | 2.5%  | 0.7%   | 0.4%    | 1.1%  | 4.8%  | 0.9%   |
| <b>Scuba diving</b>                       | 2.0%      | 2.0%      | 1.5%  | 2.6%   | 0.4%    | 1.0%  | 3.4%  | 1.7%   |
| <b>Fishing</b>                            | 2.9%      | 3.2%      | 1.0%  | 1.1%   | 1.2%    | 0.0%  | 3.2%  | 1.1%   |
| <b>Golf</b>                               | 7.0%      | 5.5%      | 4.8%  | 6.0%   | 1.9%    | 2.1%  | 0.0%  | 2.1%   |
| <b>Running/ jogging/ fitness/ walking</b> | 29.3%     | 26.5%     | 28.5% | 30.9%  | 25.8%   | 17.3% | 24.2% | 19.8%  |

# ACTIVITIES - RECREATION (continued)

|  | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                                 | 95.8%     | 95.9%     | 97.1% | 97.9%  | 93.9%   | 96.9% | 96.8% | 95.8%  |
| <b>Cycling</b>                               | 2.8%      | 2.6%      | 3.1%  | 4.3%   | 1.3%    | 2.1%  | 3.3%  | 3.4%   |
| <b>Spa</b>                                   | 7.4%      | 7.8%      | 2.3%  | 4.1%   | 6.3%    | 5.4%  | 1.6%  | 4.3%   |
| <b>Hiking</b>                                | 40.8%     | 46.7%     | 22.1% | 44.7%  | 18.4%   | 20.0% | 59.4% | 48.4%  |
| <b>Backpacking/ camping</b>                  | 0.8%      | 1.7%      | 0.3%  | 2.1%   | 0.3%    | 1.0%  | 4.8%  | 1.7%   |
| <b>Agritourism</b>                           | 12.4%     | 15.2%     | 8.7%  | 11.3%  | 6.9%    | 13.7% | 6.3%  | 13.1%  |
| <b>Sports event or tournament</b>            | 1.8%      | 1.2%      | 1.8%  | 3.0%   | 0.8%    | 0.7%  | 0.0%  | 1.1%   |
| <b>Parks/ botanical gardens</b>              | 35.8%     | 41.6%     | 27.4% | 41.0%  | 29.3%   | 24.6% | 29.1% | 39.5%  |
| <b>Waterparks</b>                            | 1.9%      | 1.4%      | 2.3%  | 0.6%   | 1.8%    | 2.5%  | 6.5%  | 2.3%   |
| <b>Mountain tubing/ waterfall<br/>rappel</b> | 2.7%      | 2.6%      | 0.7%  | 1.4%   | 0.4%    | 0.3%  | 3.3%  | 3.2%   |
| <b>Zip-lining</b>                            | 4.3%      | 4.2%      | 0.7%  | 1.6%   | 1.2%    | 0.3%  | 3.2%  | 0.9%   |
| <b>Skydiving</b>                             | 0.1%      | 0.8%      | 1.6%  | 0.5%   | 0.0%    | 0.7%  | 4.9%  | 0.9%   |
| <b>All-terrain vehicle (ATV)</b>             | 3.0%      | 4.2%      | 0.8%  | 2.6%   | 2.2%    | 10.6% | 6.5%  | 2.5%   |
| <b>Horseback riding</b>                      | 0.9%      | 2.0%      | 1.8%  | 1.1%   | 0.2%    | 1.4%  | 4.8%  | 1.5%   |

# ACTIVITIES - ENTERTAINMENT & DINING

|  | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China  | Europe |
|--|-----------|-----------|-------|--------|---------|-------|--------|--------|
| <b>TOTAL</b>                                 | 98.4%     | 97.2%     | 97.9% | 97.7%  | 98.0%   | 99.0% | 100.0% | 96.8%  |
| <b>Lunch/ sunset/ dinner/ evening cruise</b> | 20.9%     | 25.4%     | 12.8% | 21.6%  | 17.4%   | 28.2% | 54.9%  | 26.3%  |
| <b>Live music/ stage show</b>                | 27.9%     | 32.4%     | 17.4% | 26.7%  | 24.8%   | 14.9% | 24.3%  | 25.7%  |
| <b>Nightclub/ dancing/ bar/ karaoke</b>      | 8.0%      | 6.6%      | 1.8%  | 6.2%   | 5.2%    | 2.7%  | 1.6%   | 8.5%   |
| <b>Fine dining</b>                           | 44.0%     | 45.1%     | 34.3% | 34.7%  | 27.7%   | 50.0% | 33.8%  | 26.5%  |
| <b>Family restaurant</b>                     | 62.6%     | 59.2%     | 24.0% | 57.4%  | 67.3%   | 45.6% | 22.8%  | 47.4%  |
| <b>Fast food</b>                             | 32.0%     | 31.7%     | 52.8% | 40.5%  | 57.1%   | 56.8% | 46.6%  | 40.1%  |
| <b>Food truck</b>                            | 47.4%     | 45.1%     | 27.0% | 45.8%  | 35.9%   | 59.3% | 34.5%  | 46.3%  |
| <b>Café/ coffee house</b>                    | 52.8%     | 49.0%     | 55.9% | 54.8%  | 62.0%   | 65.7% | 53.4%  | 59.4%  |
| <b>Ethnic dining</b>                         | 26.3%     | 30.1%     | 7.8%  | 21.1%  | 14.1%   | 27.2% | 17.6%  | 11.2%  |
| <b>Farm-to-table cuisine</b>                 | 18.7%     | 16.8%     | 16.3% | 12.1%  | 2.8%    | 3.4%  | 1.6%   | 9.8%   |
| <b>Prepared own meal</b>                     | 46.7%     | 35.9%     | 27.3% | 52.2%  | 29.8%   | 18.5% | 17.9%  | 35.1%  |

# ACTIVITIES - SHOPPING

|                                 | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                    | 96.0%     | 95.6%     | 97.7% | 95.5%  | 96.5%   | 97.6% | 92.1% | 94.5%  |
| <b>Malls/ department stores</b> | 42.1%     | 42.8%     | 80.3% | 54.1%  | 73.7%   | 81.0% | 53.3% | 55.6%  |
| <b>Designer boutiques</b>       | 16.5%     | 17.3%     | 11.4% | 15.1%  | 14.5%   | 4.9%  | 6.5%  | 13.6%  |
| <b>Hotel/ resort stores</b>     | 32.3%     | 38.5%     | 32.4% | 27.2%  | 30.7%   | 31.4% | 25.8% | 27.8%  |
| <b>Swap meet/ flea market</b>   | 19.0%     | 16.2%     | 4.4%  | 14.7%  | 7.6%    | 4.2%  | 3.3%  | 7.7%   |
| <b>Discount/ outlet stores</b>  | 13.4%     | 13.0%     | 26.4% | 15.1%  | 35.2%   | 53.5% | 8.0%  | 14.2%  |
| <b>Supermarkets</b>             | 57.4%     | 50.5%     | 63.1% | 56.7%  | 52.9%   | 48.7% | 56.6% | 61.2%  |
| <b>Farmer's market</b>          | 40.2%     | 31.5%     | 21.6% | 36.8%  | 16.4%   | 9.3%  | 25.9% | 34.2%  |
| <b>Convenience stores</b>       | 50.8%     | 50.9%     | 56.9% | 50.5%  | 68.8%   | 54.0% | 53.3% | 39.5%  |
| <b>Duty free stores</b>         | 5.8%      | 3.9%      | 18.4% | 6.6%   | 13.9%   | 35.1% | 19.4% | 7.8%   |
| <b>Hawai'i-made products</b>    | 45.7%     | 50.1%     | 23.1% | 44.8%  | 34.2%   | 27.8% | 34.0% | 45.6%  |
| <b>Local shops and artisans</b> | 54.6%     | 57.6%     | 11.5% | 54.8%  | 41.6%   | 21.5% | 24.2% | 47.3%  |
| <b>Local fashion designers</b>  | 7.4%      | 7.3%      | 3.6%  | 6.8%   | 9.3%    | 1.7%  | 8.1%  | 11.2%  |

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

|   | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>  | 69.3%     | 77.6%     | 53.2% | 74.2%  | 75.1%   | 59.3% | 82.2% | 78.1%  |
| <b>Historic military sites and museums</b>          | 21.1%     | 31.2%     | 9.8%  | 24.2%  | 48.7%   | 20.0% | 35.5% | 36.3%  |
| <b>Historic Hawaiian sites and museums</b>          | 31.1%     | 36.7%     | 17.7% | 32.4%  | 23.9%   | 11.1% | 34.0% | 34.6%  |
| <b>Other historical sites, museums, and homes</b>   | 11.7%     | 16.0%     | 6.0%  | 16.1%  | 11.1%   | 15.9% | 13.0% | 14.5%  |
| <b>Art museums</b>                                  | 3.0%      | 3.4%      | 1.6%  | 2.5%   | 3.6%    | 4.8%  | 9.6%  | 4.3%   |
| <b>Art galleries and exhibitions</b>                | 8.1%      | 8.5%      | 5.1%  | 10.9%  | 7.2%    | 2.1%  | 4.9%  | 7.6%   |
| <b>Lū'au/ Polynesian show/ hula show</b>            | 27.3%     | 38.3%     | 15.1% | 29.4%  | 24.1%   | 22.1% | 20.9% | 30.6%  |
| <b>Lesson- ex. ukulele, hula, canoe, lei making</b> | 5.9%      | 6.7%      | 4.2%  | 5.5%   | 3.8%    | 4.2%  | 9.8%  | 5.1%   |
| <b>Play/ concert/ theatre</b>                       | 3.4%      | 2.7%      | 3.2%  | 3.0%   | 2.3%    | 3.7%  | 6.4%  | 2.5%   |
| <b>Art/ craft fair</b>                              | 10.9%     | 11.0%     | 2.4%  | 11.2%  | 5.0%    | 3.8%  | 4.9%  | 4.2%   |
| <b>Festival /event</b>                              | 5.3%      | 5.1%      | 6.4%  | 5.6%   | 7.9%    | 2.8%  | 0.0%  | 4.9%   |

# ACTIVITIES - TRANSPORTATION

|                                   | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|-----------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>                      | 91.6%     | 91.9%     | 95.9% | 94.3%  | 97.9%   | 95.5% | 95.1% | 93.0%  |
| <b>Airport shuttle</b>            | 12.9%     | 15.3%     | 18.3% | 15.9%  | 30.6%   | 15.5% | 14.4% | 18.3%  |
| <b>Trolley</b>                    | 2.0%      | 2.3%      | 48.5% | 4.0%   | 14.2%   | 21.0% | 1.7%  | 4.7%   |
| <b>Public bus</b>                 | 4.3%      | 5.8%      | 27.0% | 11.2%  | 27.9%   | 11.6% | 19.0% | 18.7%  |
| <b>Tour bus/ tour van</b>         | 7.2%      | 16.3%     | 20.9% | 14.7%  | 34.8%   | 24.6% | 7.9%  | 16.8%  |
| <b>Taxi/ limo</b>                 | 6.5%      | 7.6%      | 31.3% | 14.8%  | 31.0%   | 19.3% | 6.3%  | 16.4%  |
| <b>Rental car</b>                 | 71.4%     | 69.8%     | 24.6% | 65.8%  | 30.4%   | 54.0% | 51.7% | 55.9%  |
| <b>Ride share</b>                 | 20.3%     | 23.2%     | 20.6% | 21.3%  | 46.4%   | 25.5% | 35.2% | 26.3%  |
| <b>Car share (i.e.,Hui, Turo)</b> | 4.3%      | 3.2%      | 0.7%  | 5.7%   | 3.2%    | 3.5%  | 3.3%  | 2.8%   |
| <b>Bicycle rental</b>             | 2.1%      | 2.2%      | 3.0%  | 2.5%   | 1.4%    | 1.0%  | 3.3%  | 2.3%   |

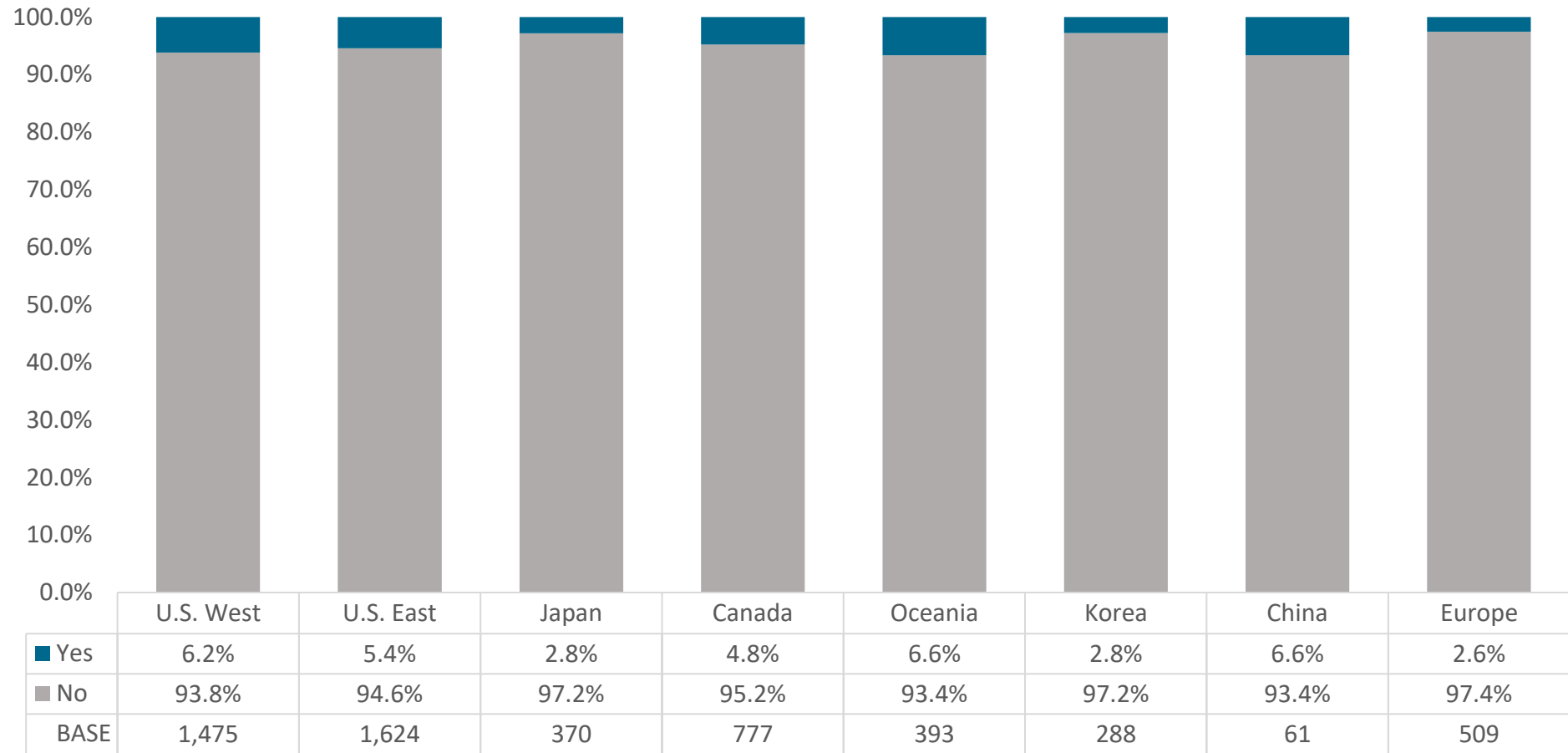
# ACTIVITIES - OTHER

|   | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>TOTAL</b>  | 31.8%     | 29.0%     | 16.6% | 21.9%  | 10.7%   | 20.7% | 13.0% | 16.4%  |
| <b>Visit friends/ family</b>                            | 29.8%     | 27.0%     | 14.5% | 19.9%  | 9.5%    | 19.0% | 9.7%  | 13.4%  |
| <b>Volunteering/ Giving back to the local community</b> | 3.0%      | 2.6%      | 2.0%  | 2.7%   | 1.2%    | 2.8%  | 3.3%  | 4.2%   |

# Section 3 – Travelers with Disabilities



# DISABLED TRAVELER - REQUIRED ASSISTANCE

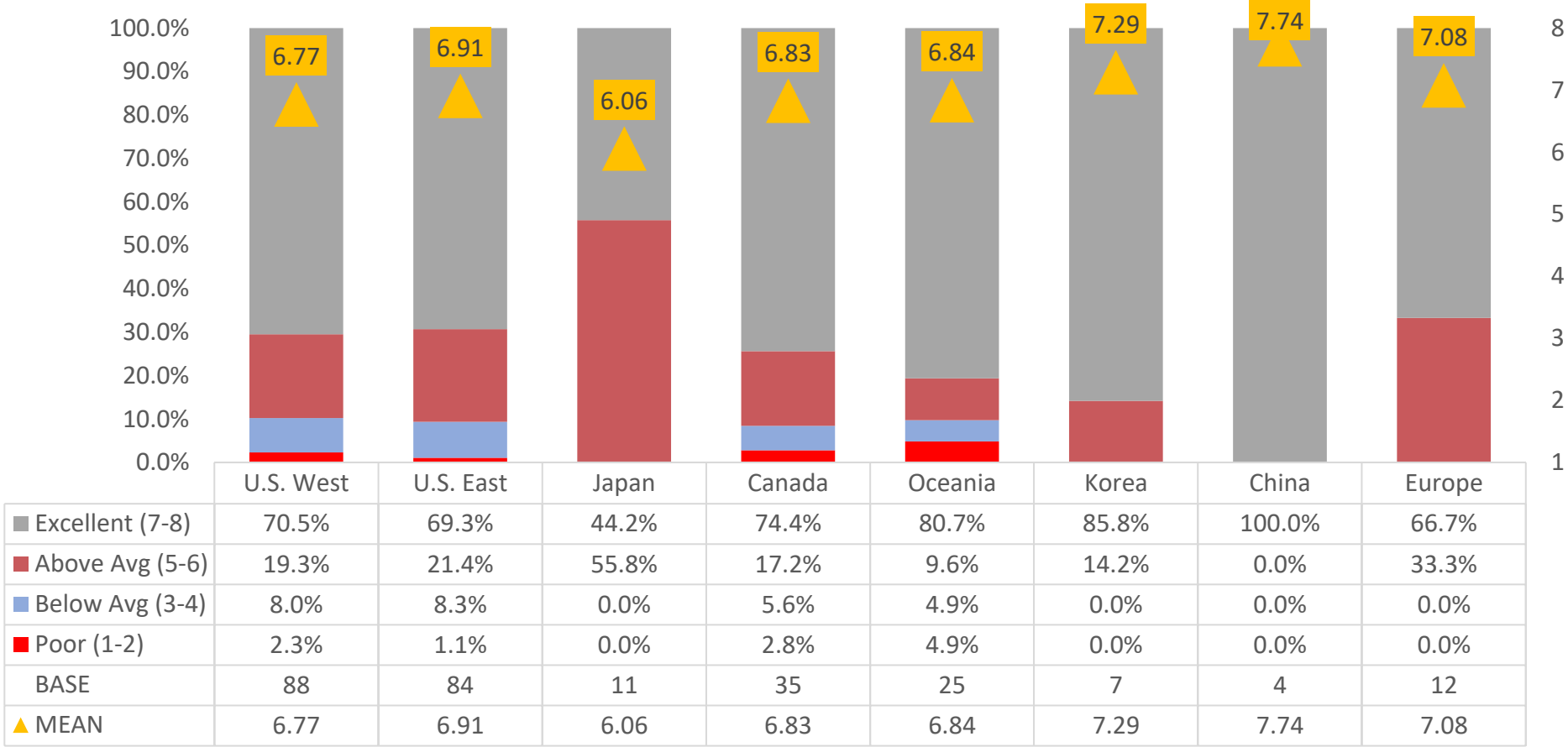


# DISABLED TRAVELER - REQUIRED ASSISTANCE

|                                      | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--------------------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Mobility aid                         | 70.0%     | 75.9%     | 46.9% | 61.9%  | 59.7%   | 12.3% | 74.2% | 46.2%  |
| Personal assistance                  | 27.8%     | 15.8%     | 8.8%  | 21.5%  | 33.9%   | 12.3% | 0.0%  | 23.0%  |
| NA- No one needed assistance         | 6.7%      | 8.1%      | 26.5% | 8.2%   | 12.9%   | 36.9% | 25.8% | 15.4%  |
| Other                                | 5.5%      | 9.3%      | 8.8%  | 5.4%   | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Orientation and Mobility Assistance  | 5.5%      | 1.2%      | 17.7% | 10.9%  | 3.2%    | 12.3% | 0.0%  | 7.7%   |
| ASL Interpreter/ texting/ captioning | 1.1%      | 3.5%      | 0.0%  | 2.8%   | 0.0%    | 12.3% | 0.0%  | 0.0%   |
| Lift equipped van                    | 2.2%      | 0.0%      | 0.0%  | 2.7%   | 0.0%    | 0.0%  | 0.0%  | 23.1%  |
| Print material in alternate format   | 0.0%      | 1.1%      | 0.0%  | 0.0%   | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Disabled parking/ placard            | 0.0%      | 0.0%      | 0.0%  | 5.3%   | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Service/ assistance animal           | 0.0%      | 0.0%      | 0.0%  | 0.0%   | 0.0%    | 13.1% | 0.0%  | 7.7%   |
| No help was offered                  | 0.0%      | 0.0%      | 0.0%  | 0.0%   | 0.0%    | 13.1% | 0.0%  | 0.0%   |
| BASE                                 | 90        | 86        | 11    | 37     | 25      | 8     | 4     | 13     |

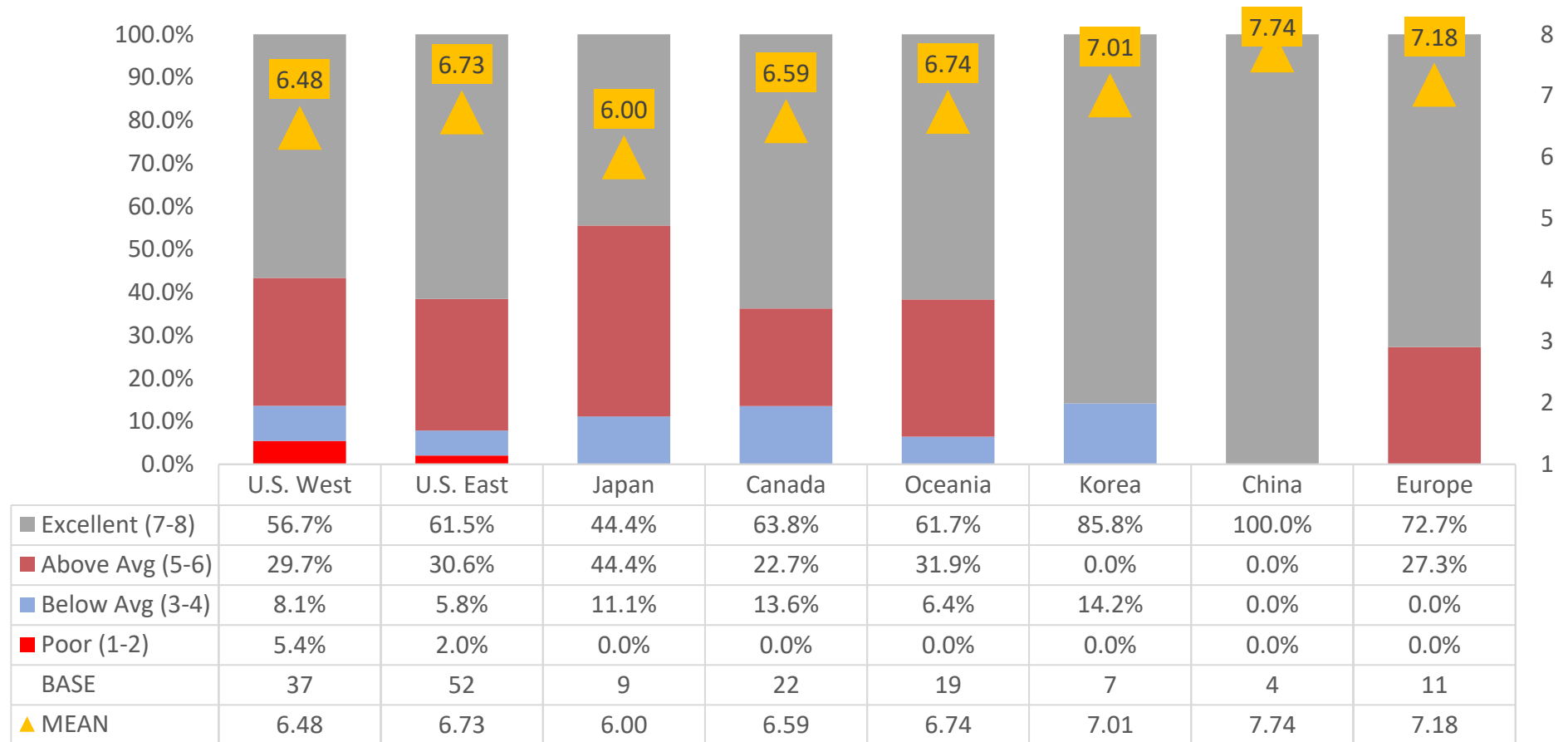
# OVERALL ACCESSIBILITY - AIRPORTS

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



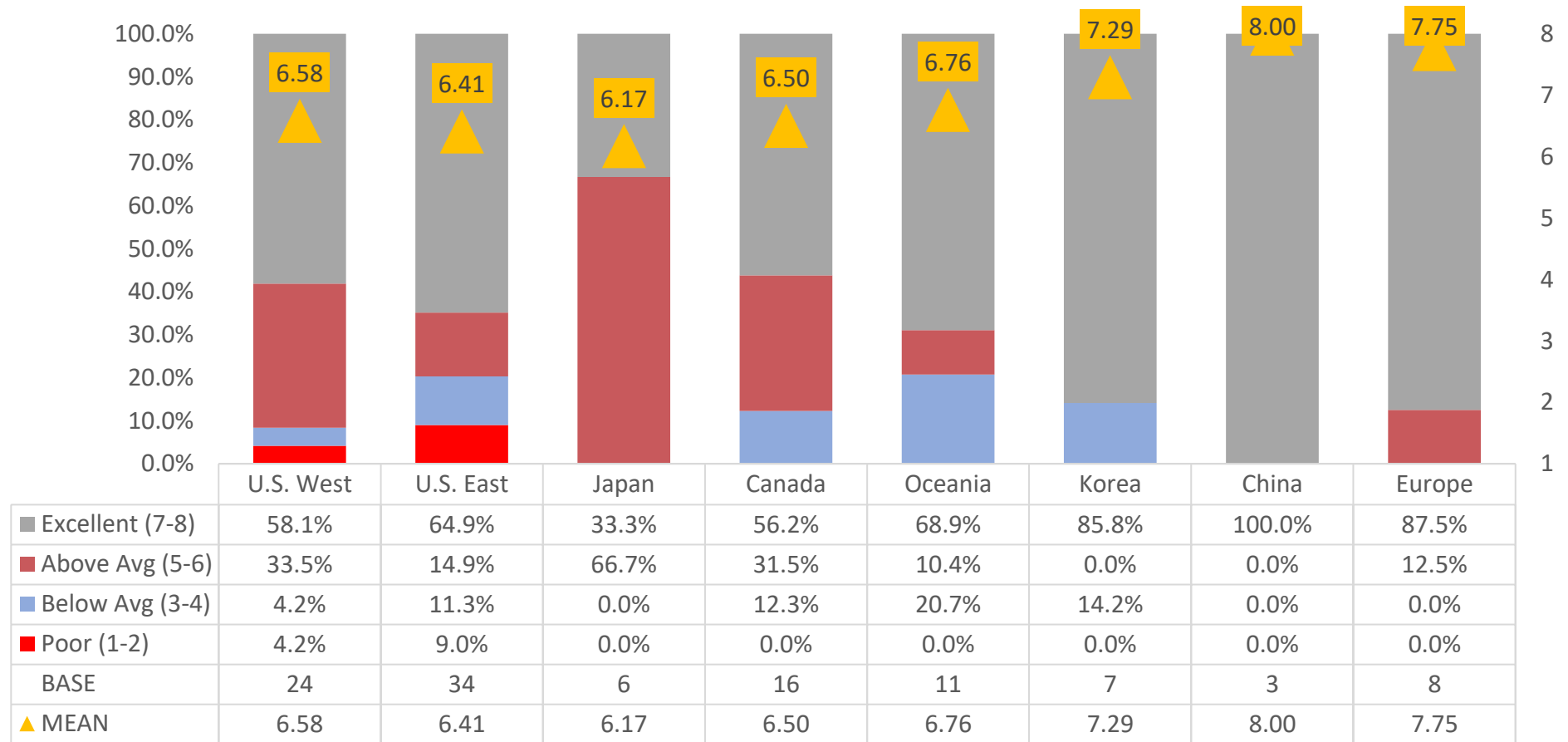
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



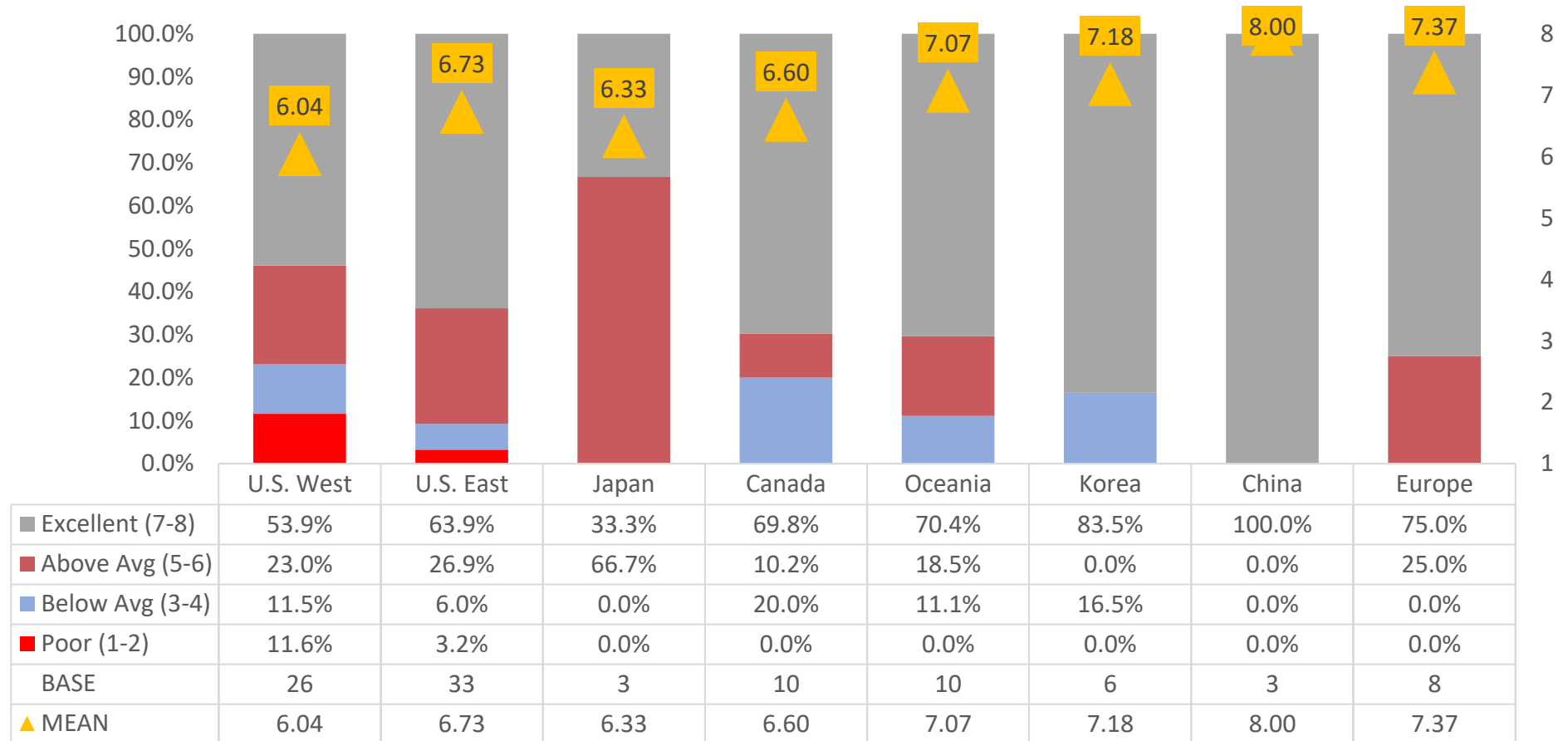
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



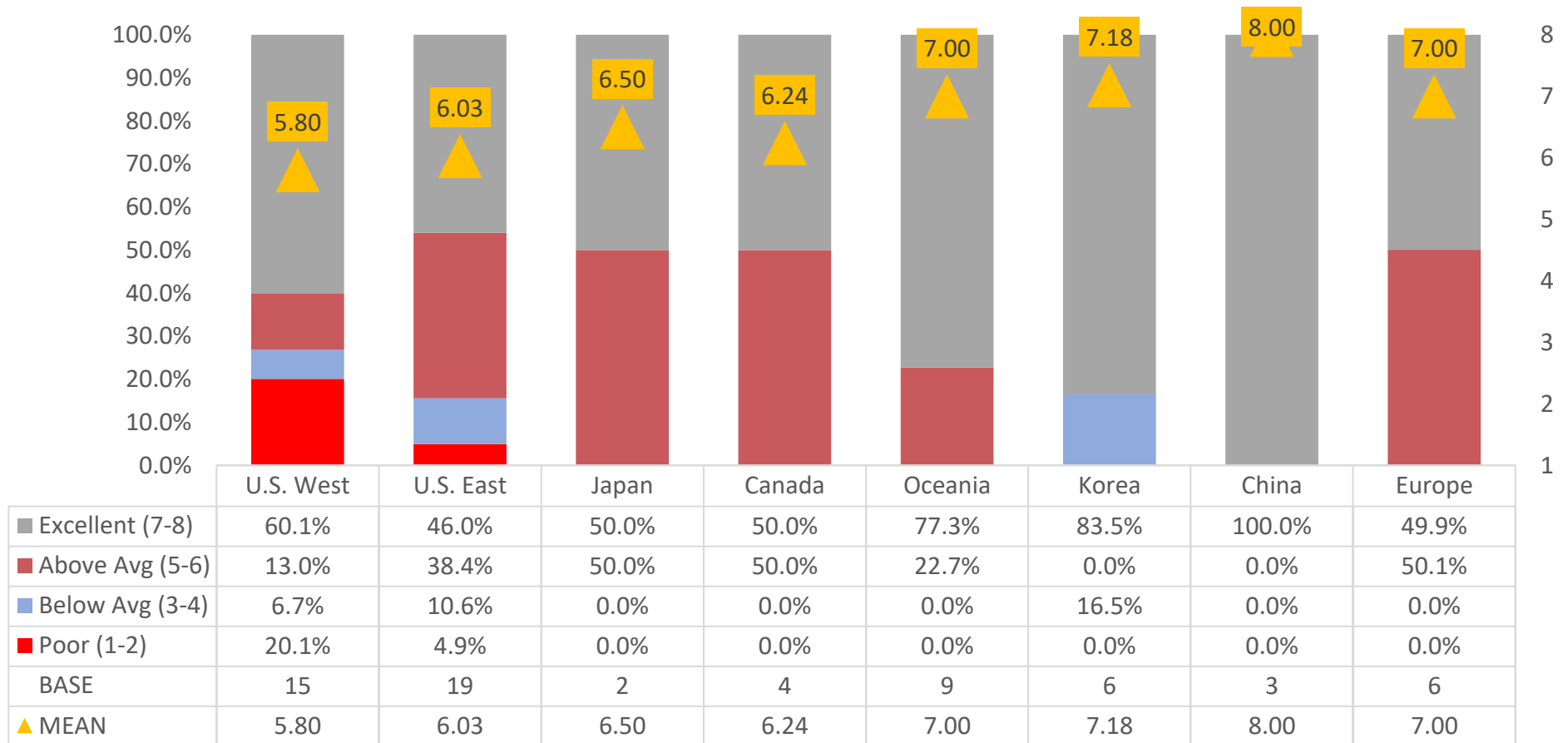
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



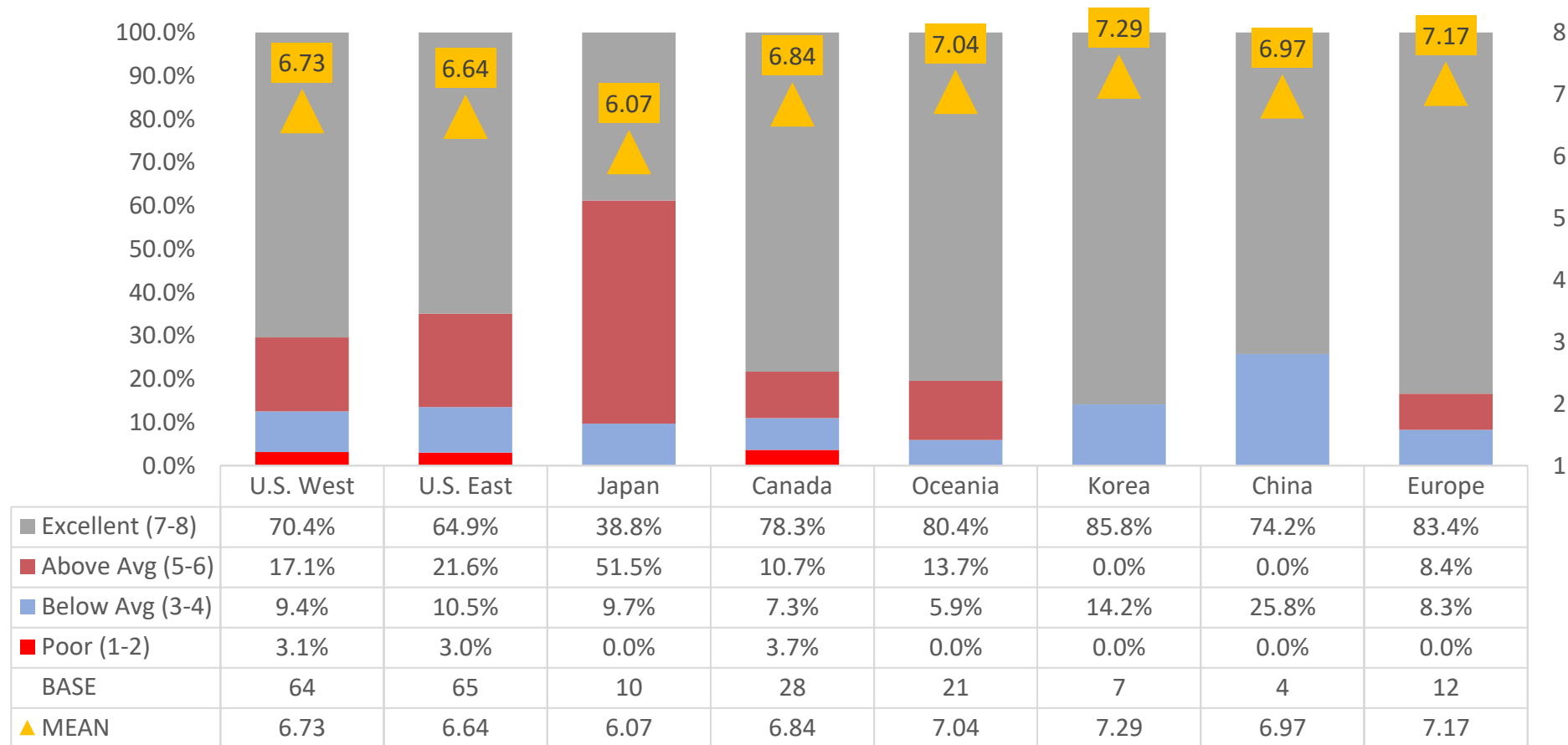
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



# OVERALL ACCESSIBILITY - HOTELS

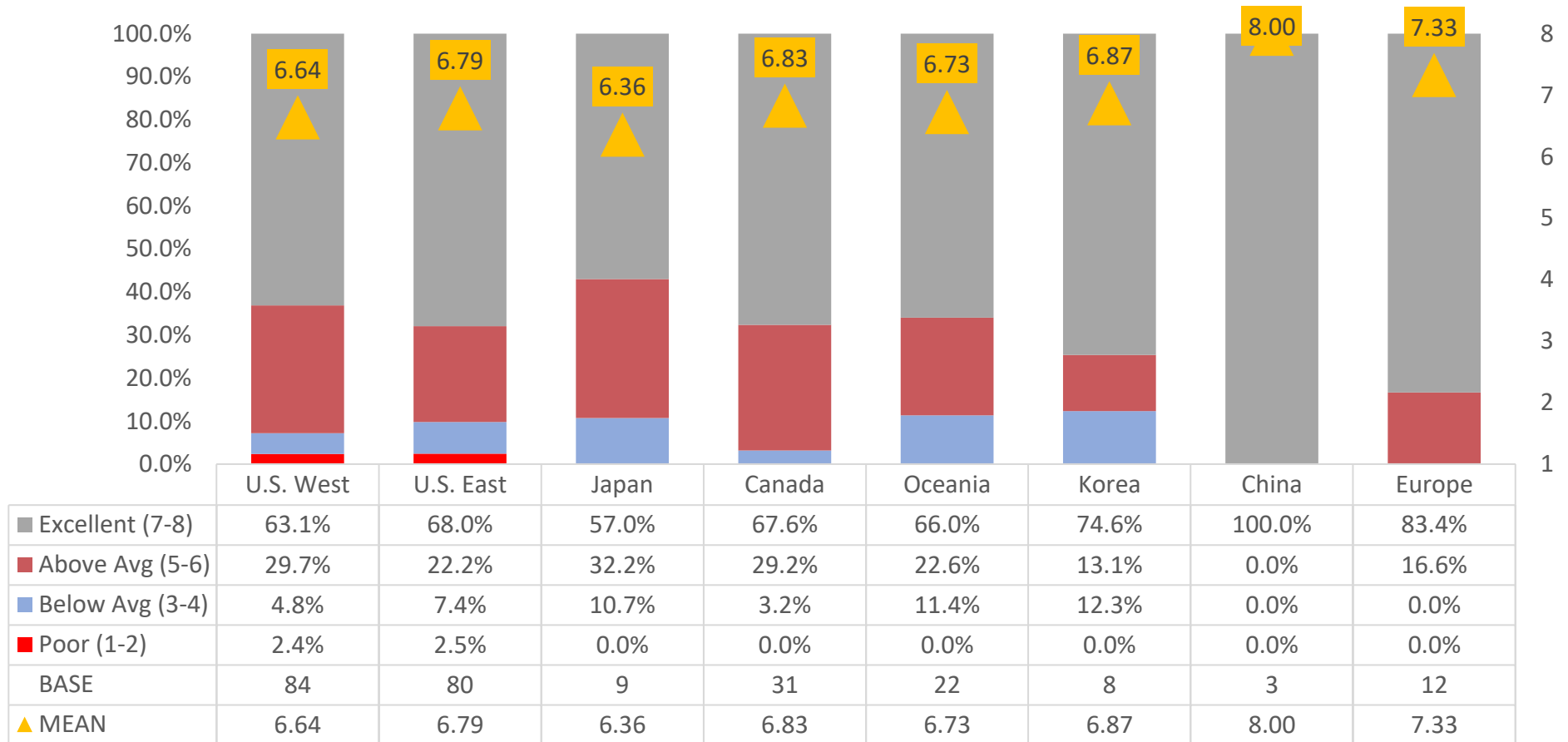
8-pt Rating Scale  
8=Excellent / 1=Poor





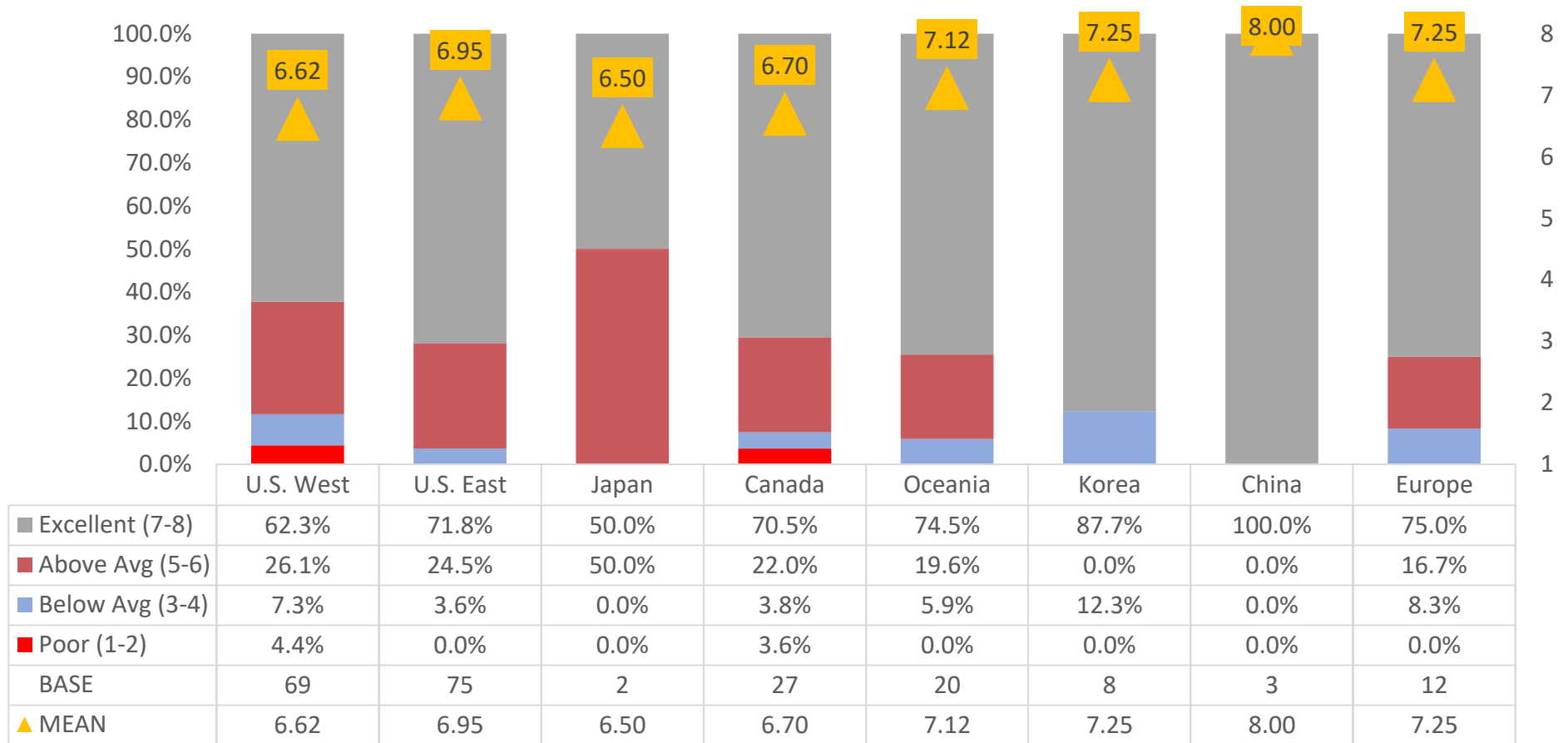
# OVERALL ACCESSIBILITY - RESTAURANTS

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



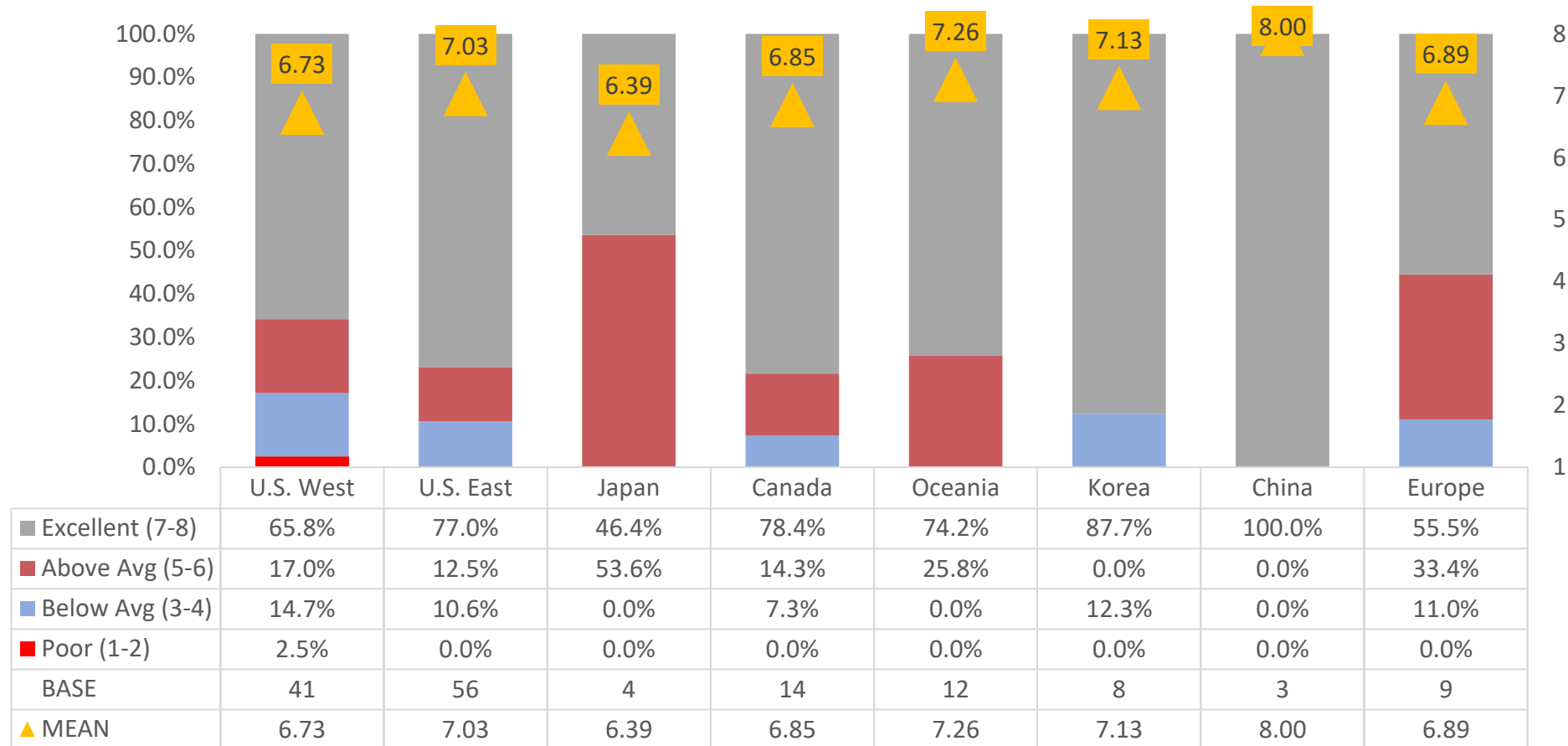
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



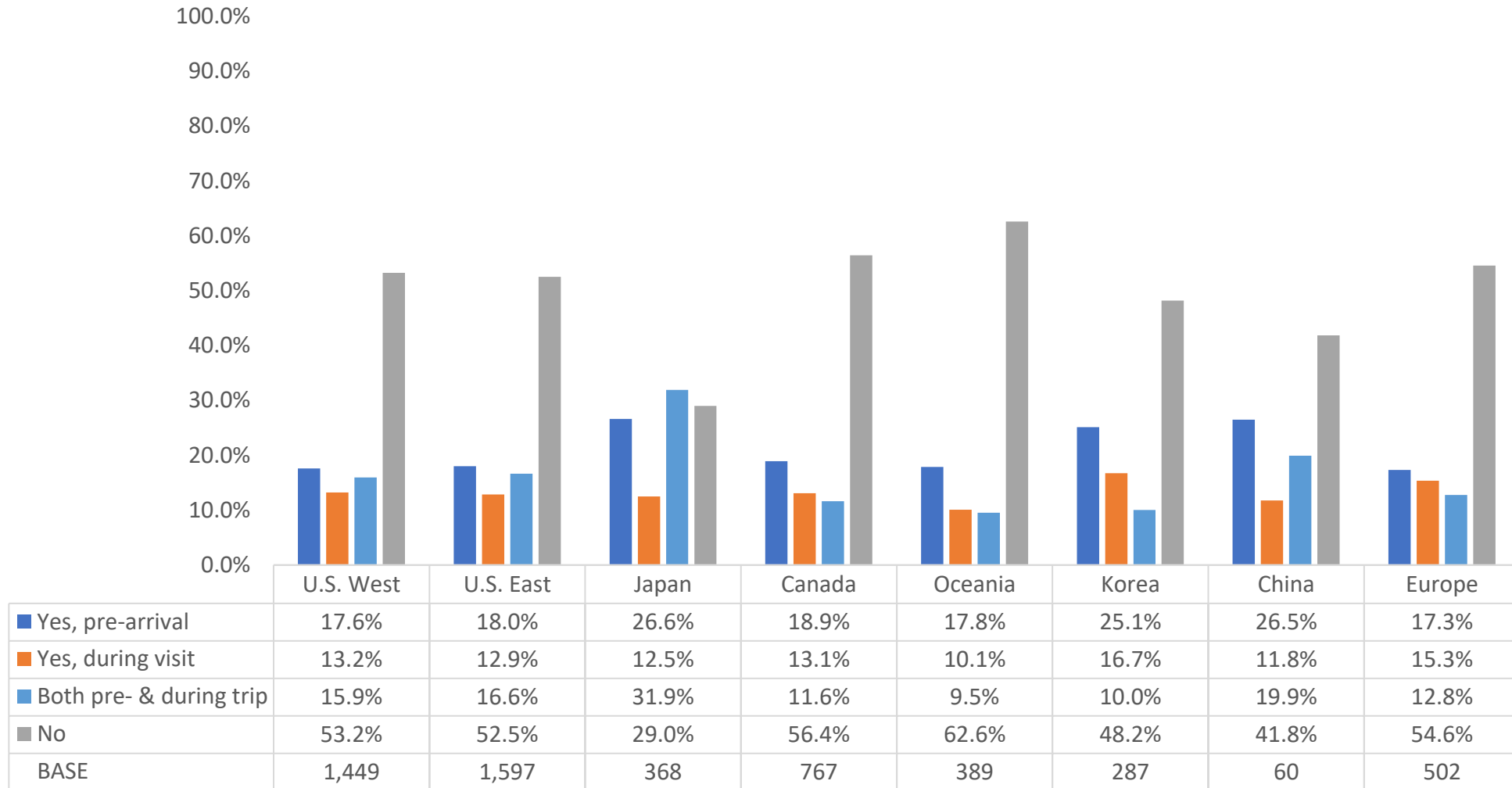
# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

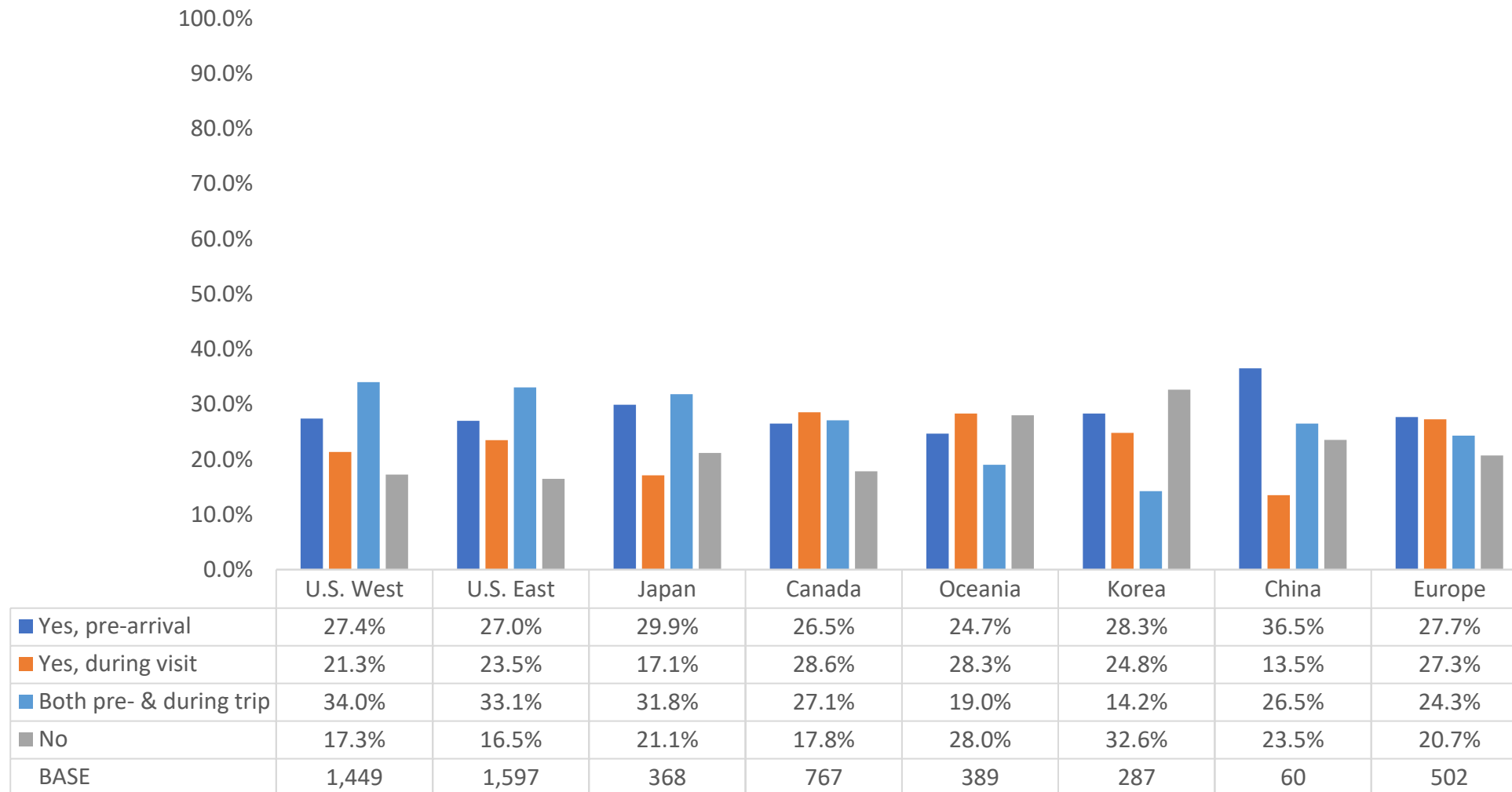


# Section 4 – Alternative Messaging

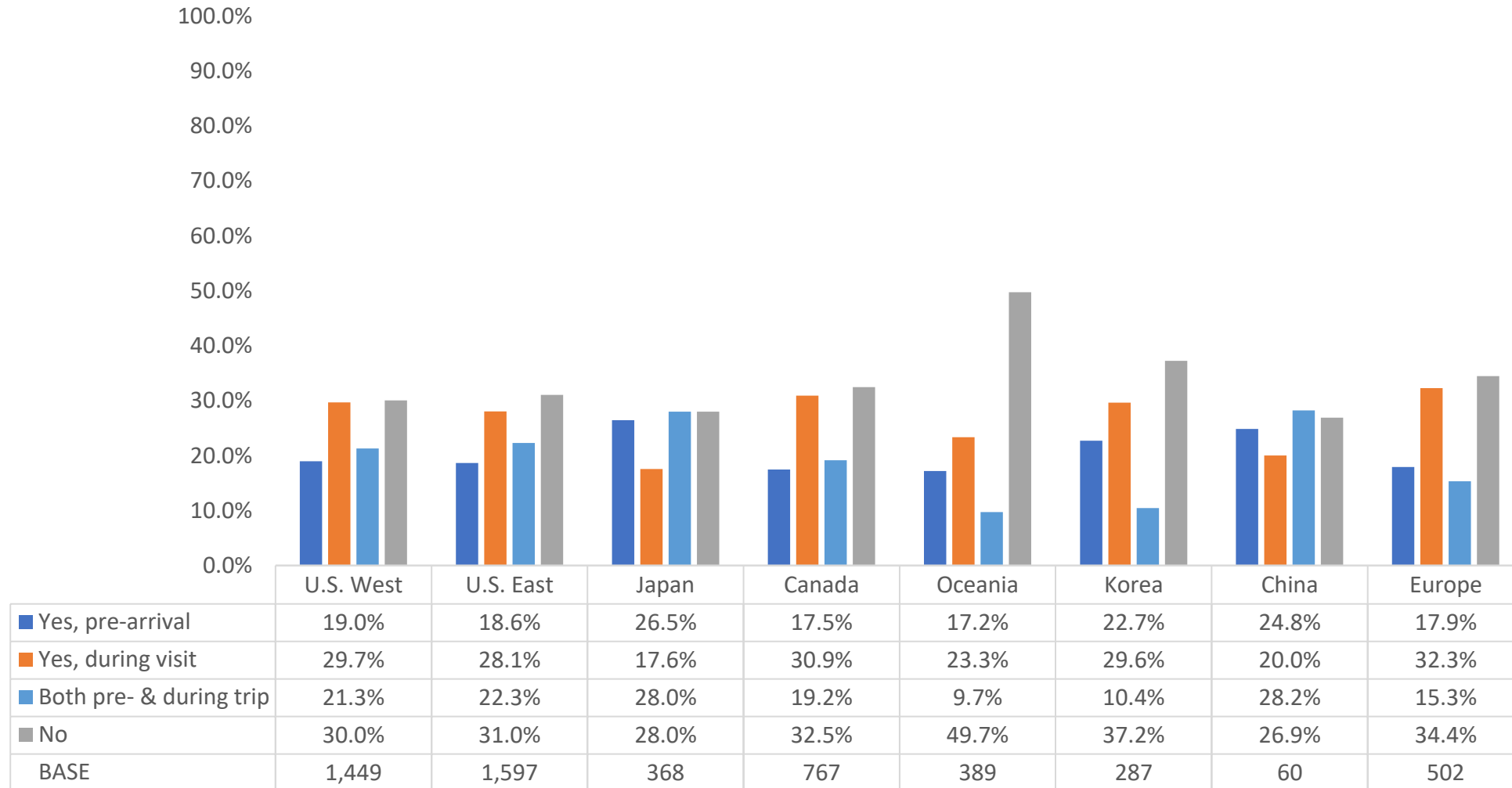
# SAFE AND RESPONSIBLE TRAVEL



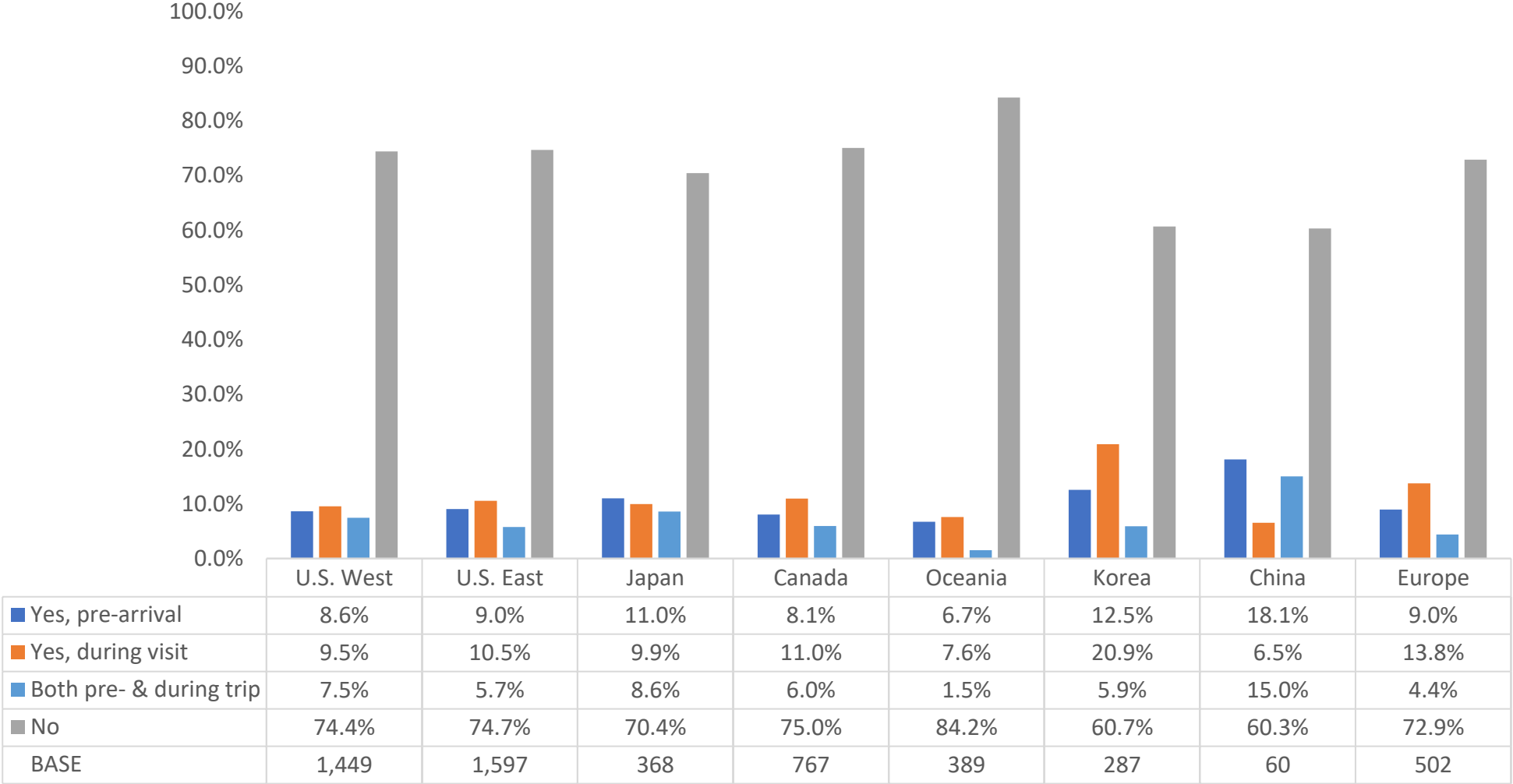
# CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



# OCEAN AND HIKING SAFETY

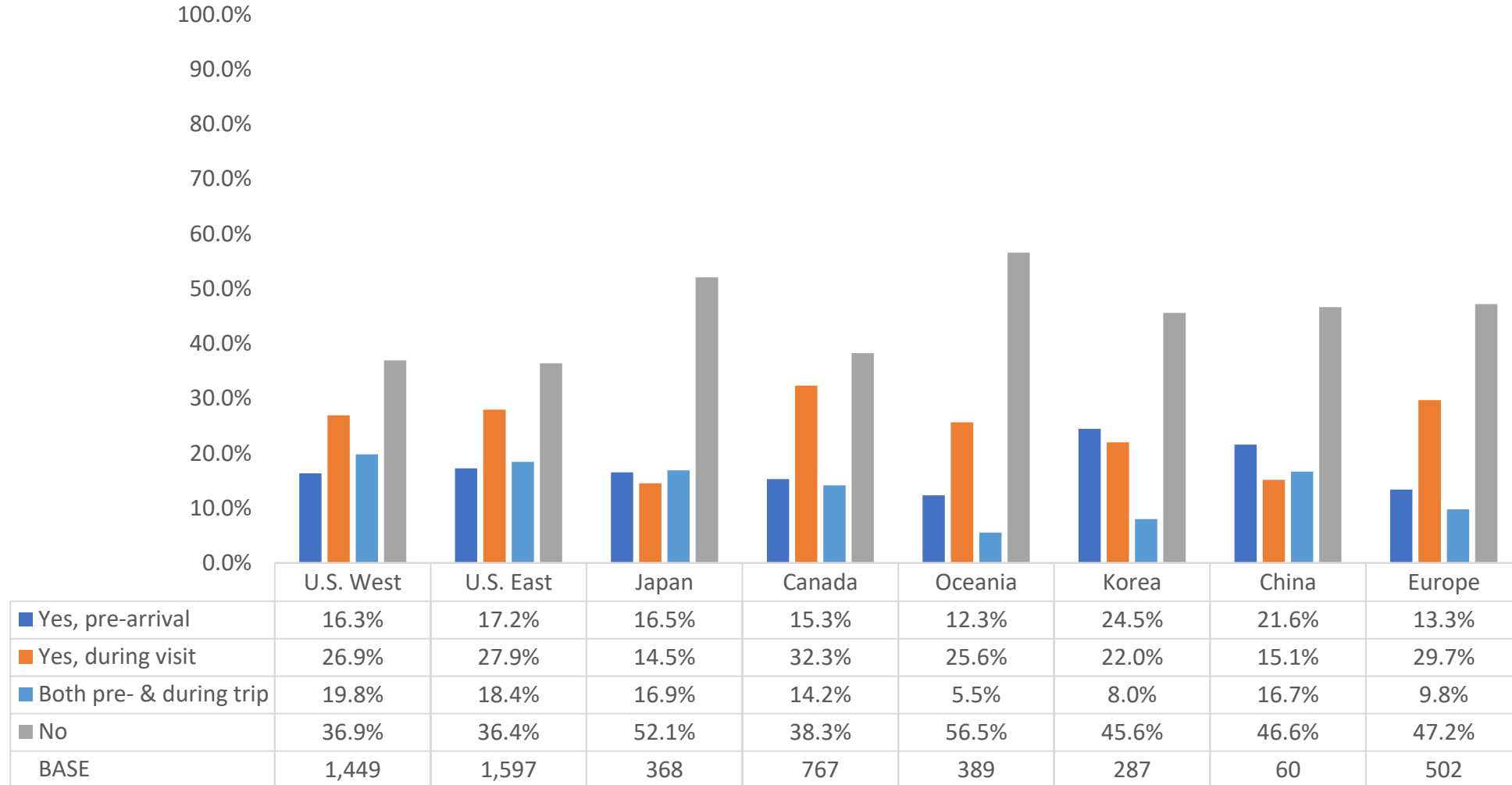


# VOLUNTEER / GIVE-BACK OPPORTUNITIES

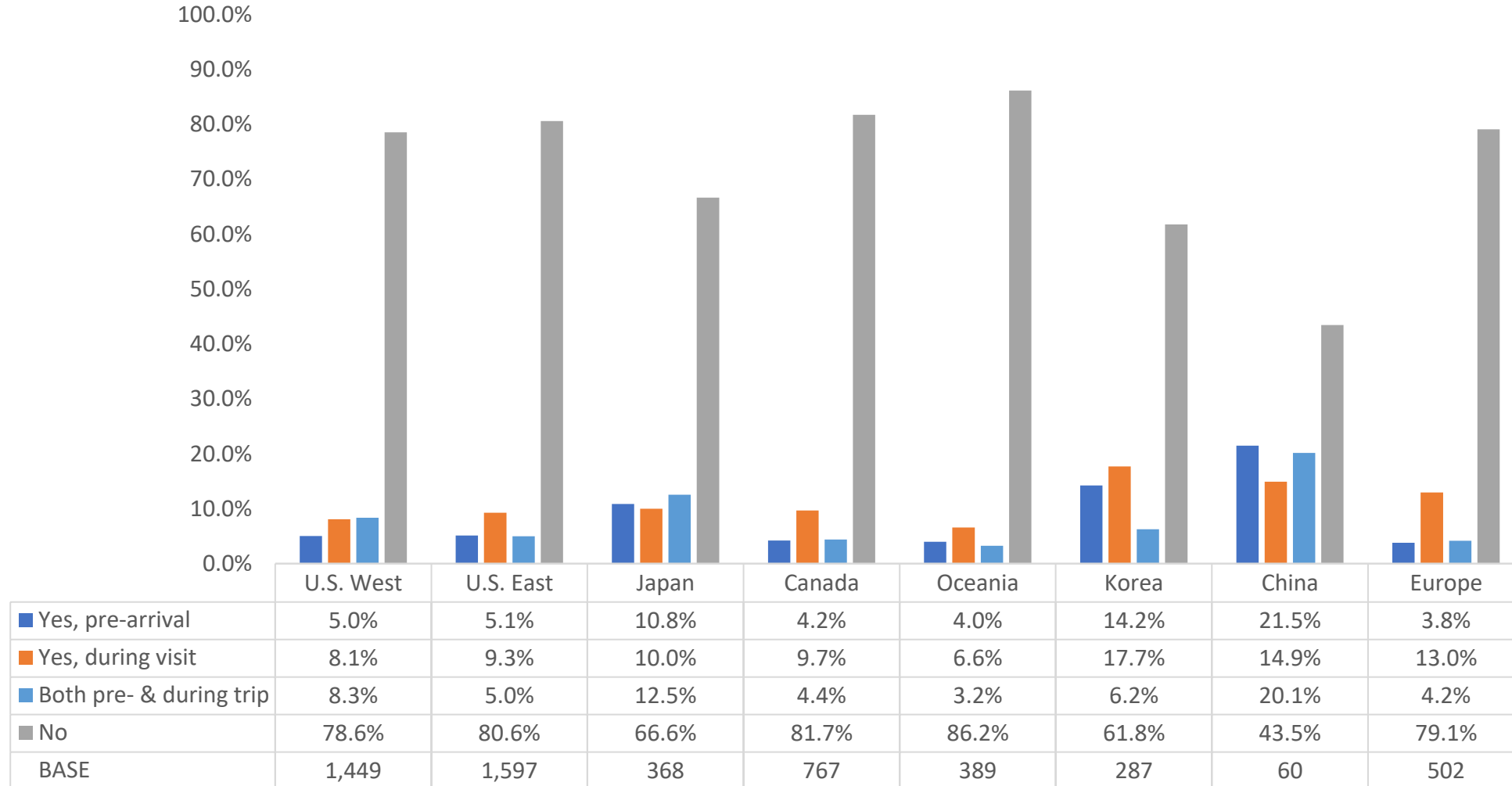




# SUPPORT LOCAL / SHOP LOCAL



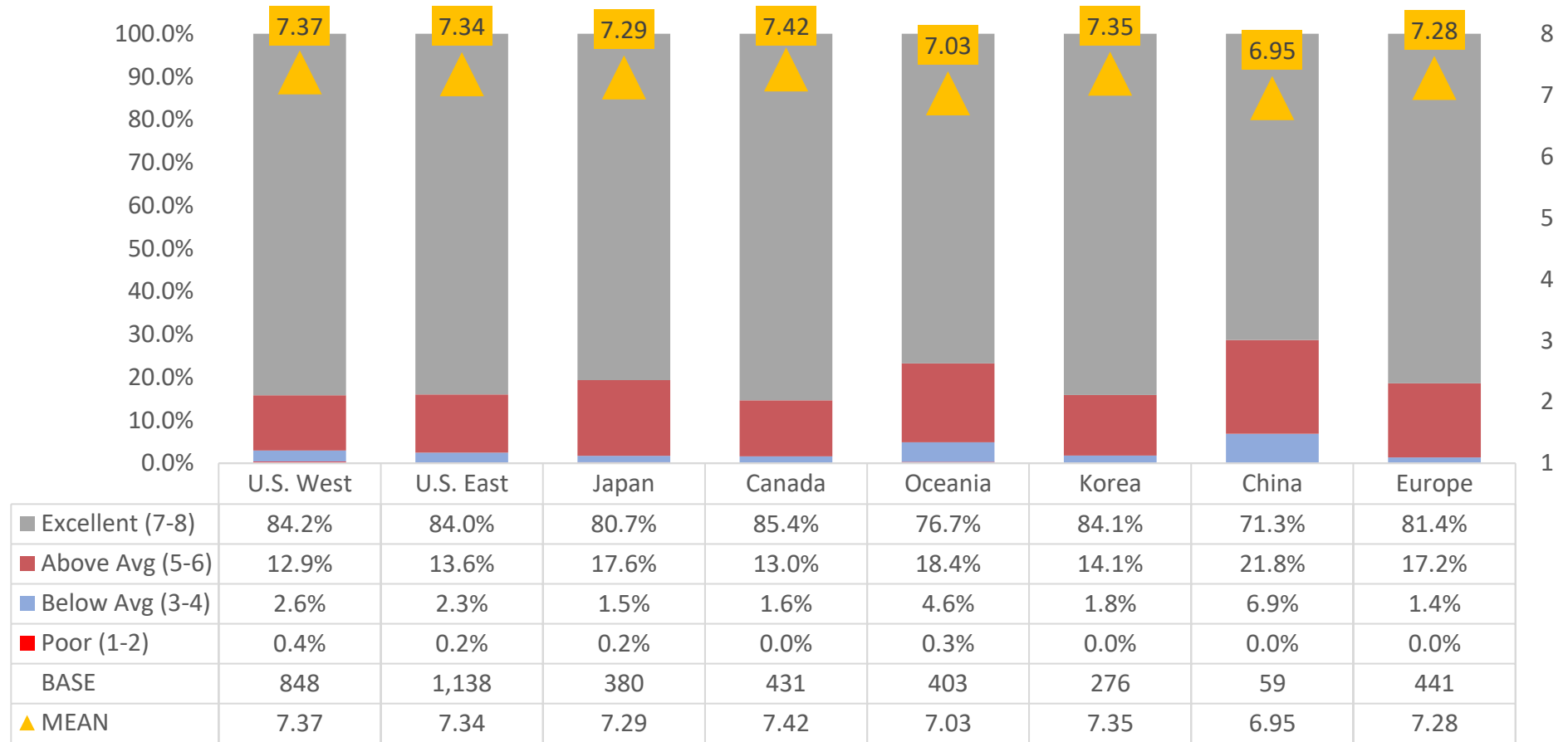
# MĀLAMA HAWAI‘I



# Section 5 – O‘ahu

# SATISFACTION - O'AHU

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



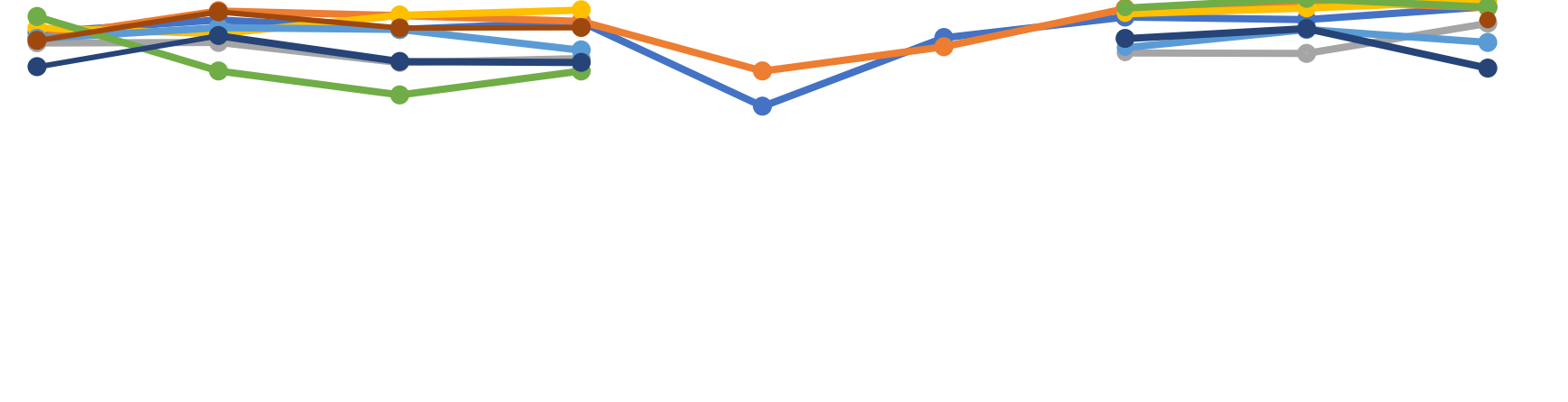
# SATISFACTION - O'AHU

- **Gender:** Female respondents from **U.S. West** expressed higher levels of satisfaction compared to male respondents from this visitor market.
- **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** and **U.S. East** 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%



|           | Q2 2016 | Q2 2017 | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 78.8%   | 81.4%   | 79.4%   | 81.0%   | 63.3%   | 77.7%   | 82.0%   | 81.5%   | 84.2%     |
| U.S. East | 77.7%   | 83.3%   | 82.3%   | 81.1%   | 70.7%   | 75.8%   | 83.8%   | 85.3%   | 84.0%     |
| Japan     | 76.6%   | 76.7%   | 72.5%   | 73.3%   |         |         | 74.5%   | 74.4%   | 80.7%     |
| Canada    | 79.7%   | 78.5%   | 82.4%   | 83.5%   |         |         | 82.7%   | 83.9%   | 85.4%     |
| Oceania   | 77.5%   | 79.8%   | 79.4%   | 75.1%   |         |         | 75.6%   | 79.4%   | 76.7%     |
| Korea     | 82.1%   | 70.7%   | 65.7%   | 70.7%   |         |         | 83.9%   | 85.9%   | 84.1%     |
| China     | 71.6%   | 78.1%   | 72.7%   | 72.5%   |         |         | 77.5%   | 79.6%   | 71.3%     |
| Europe    | 77.1%   | 83.1%   | 79.7%   | 79.8%   |         |         |         |         | 81.4%     |

P= Preliminary Data

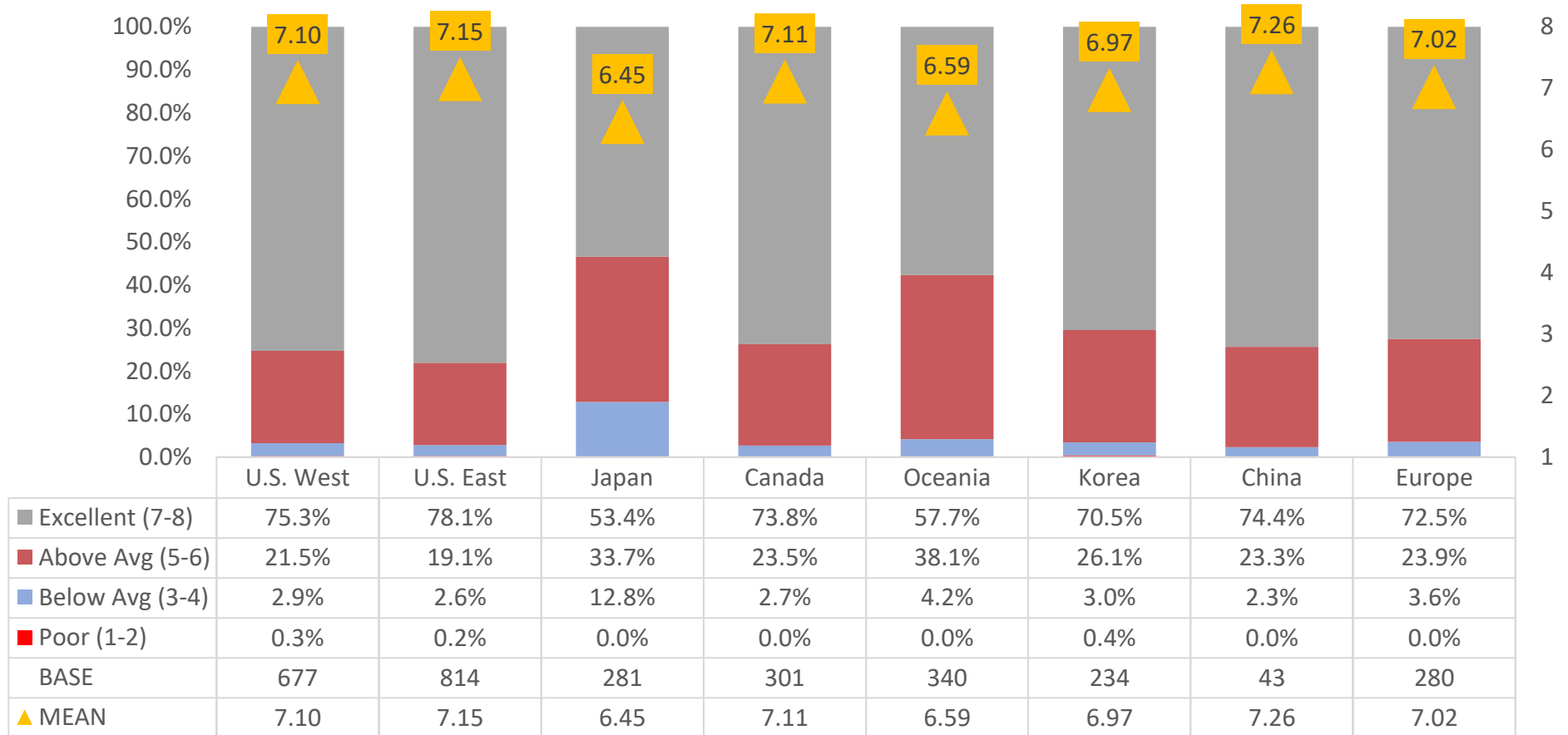
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

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.



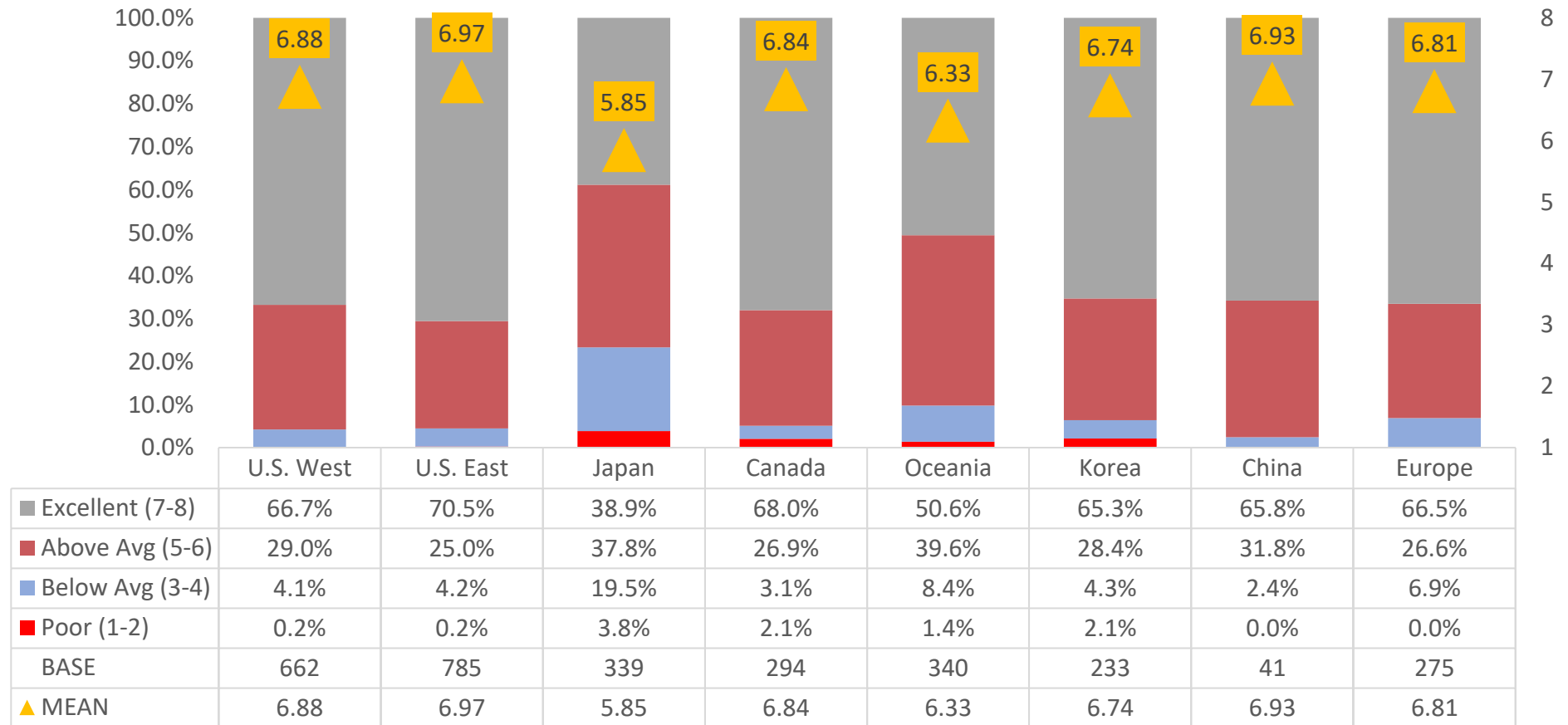
# ENTERTAINMENT/ ATTRACTIONS - O‘AHU

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



# SHOPPING - O'AHU

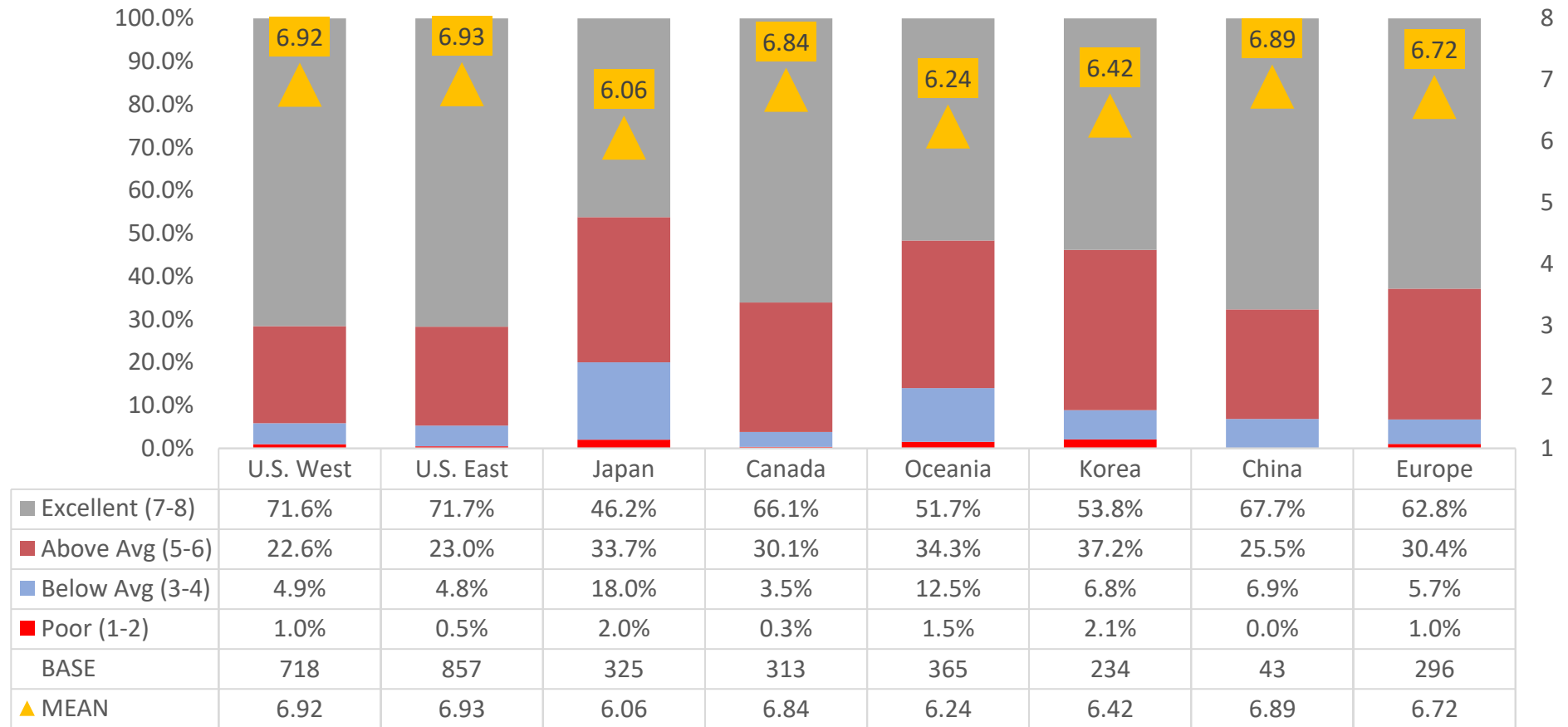
8-pt Rating Scale  
8 = Excellent / 1 = Poor





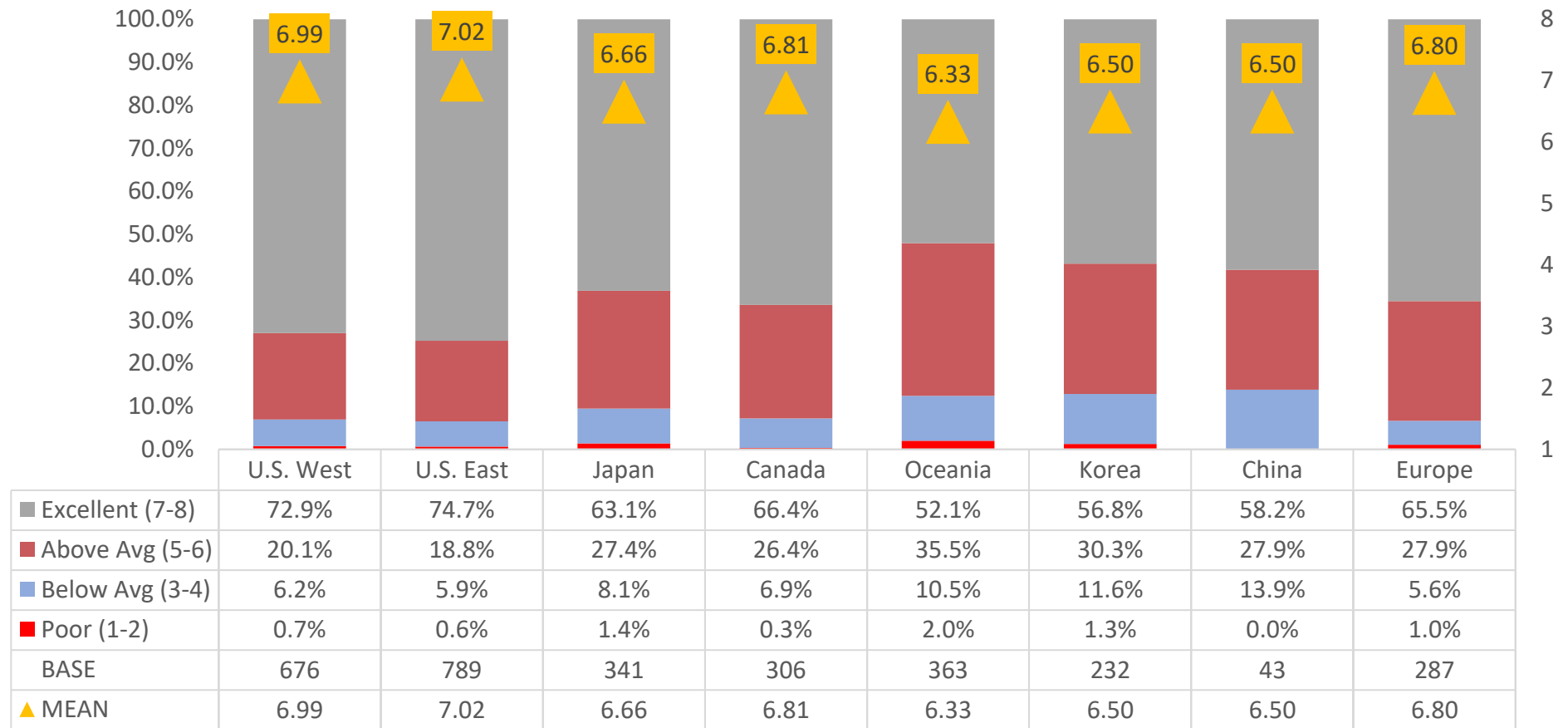
# DINING/ FOOD & BEVERAGES - O'AHU

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



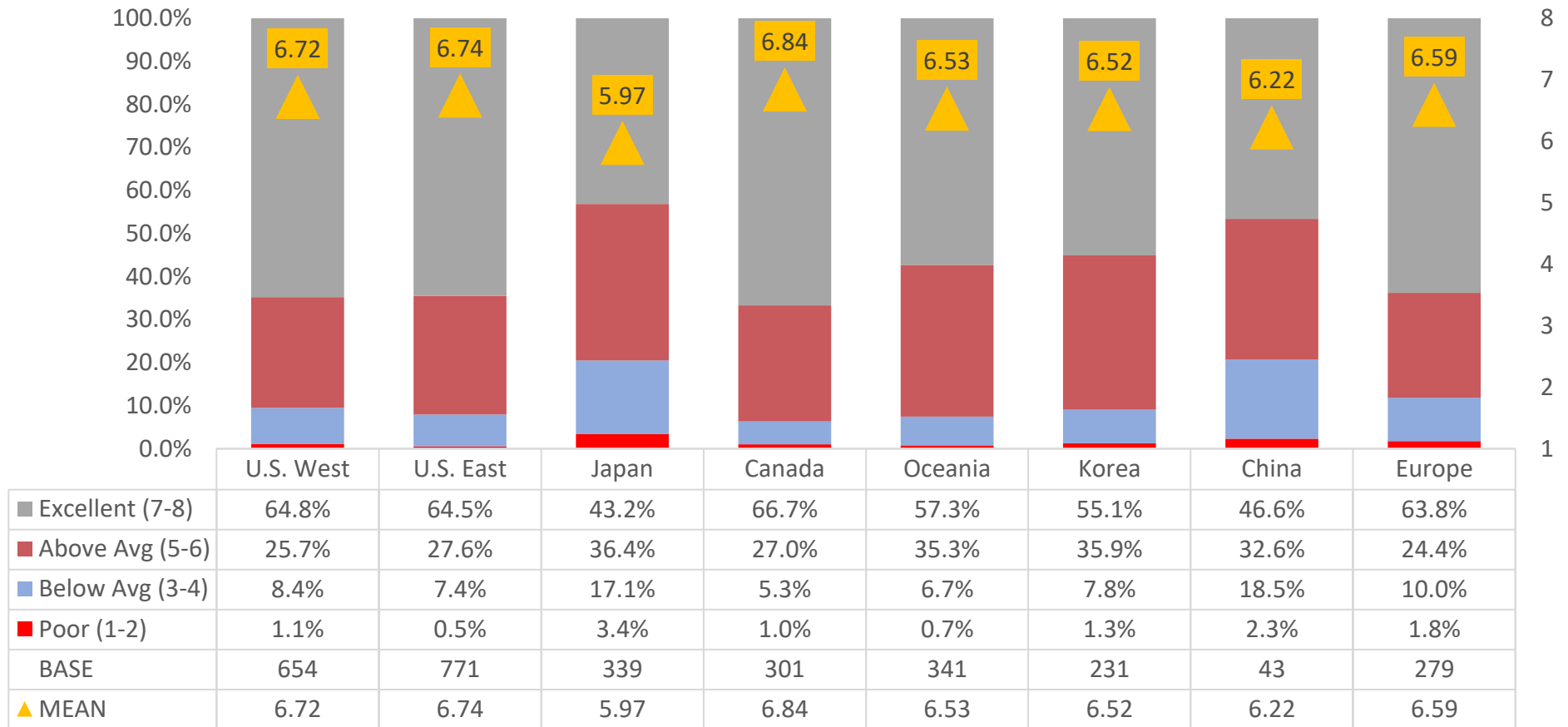
# LODGING/ ACOMMODATIONS - O'AHU

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



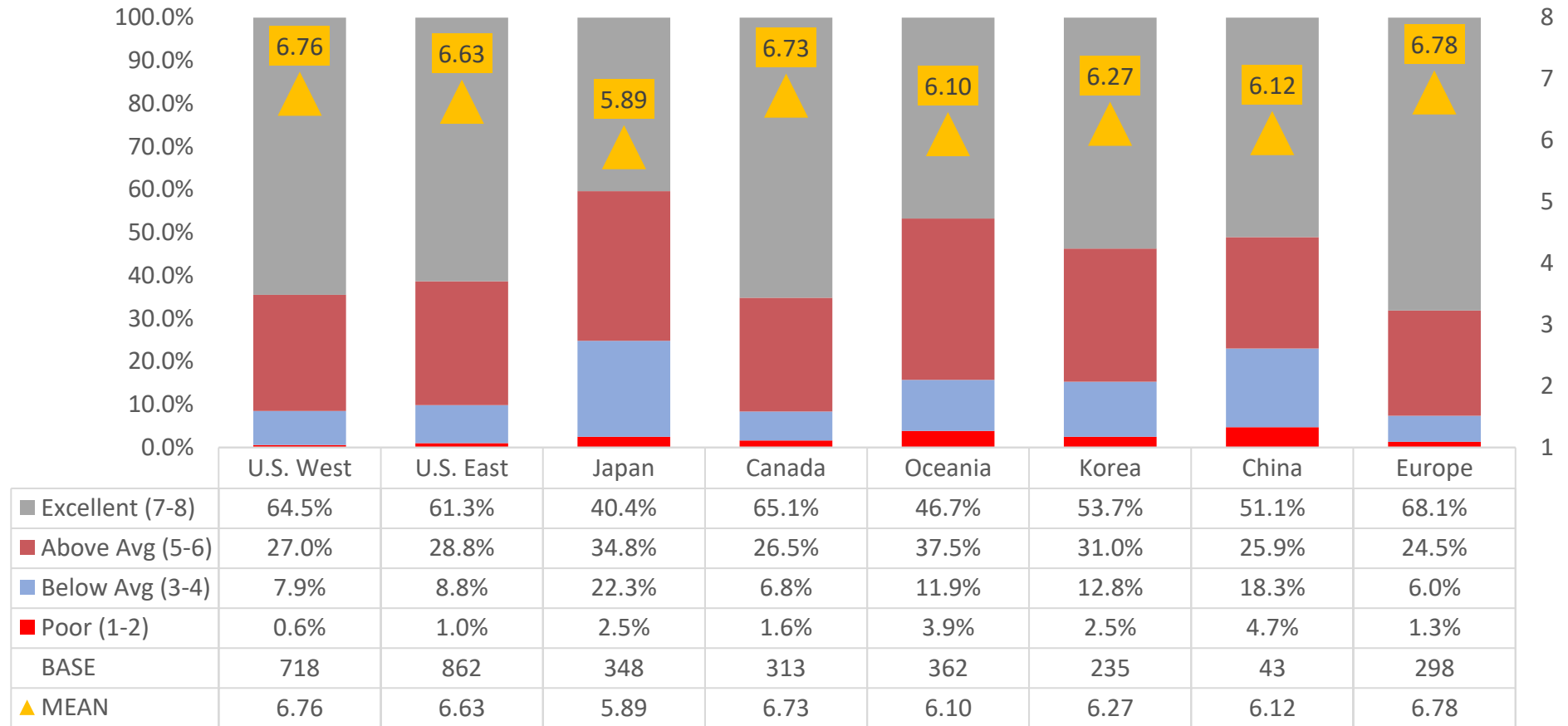
# TRANSPORTATION ON ISLAND - O‘AHU

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



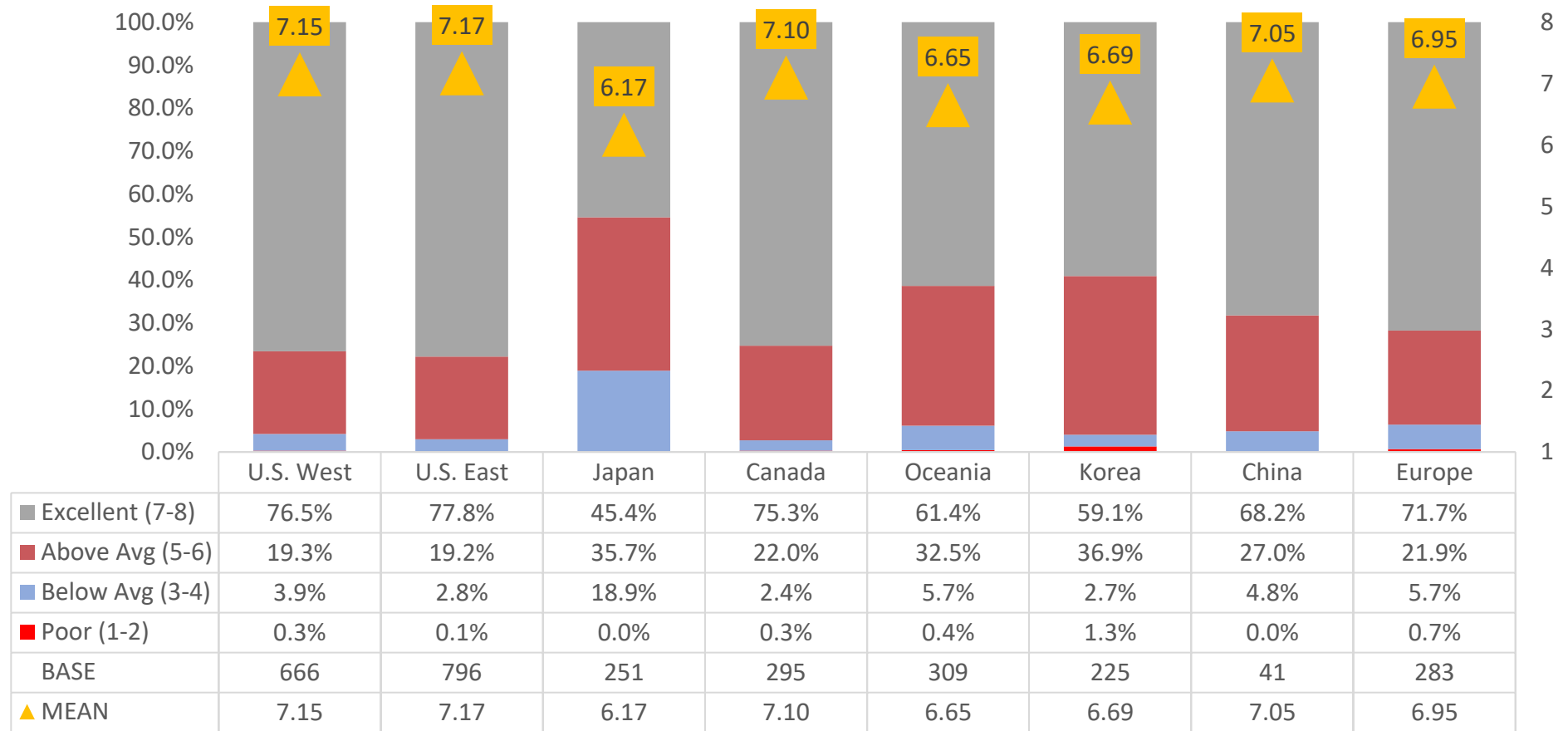
# AIRPORT - O'AHU

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



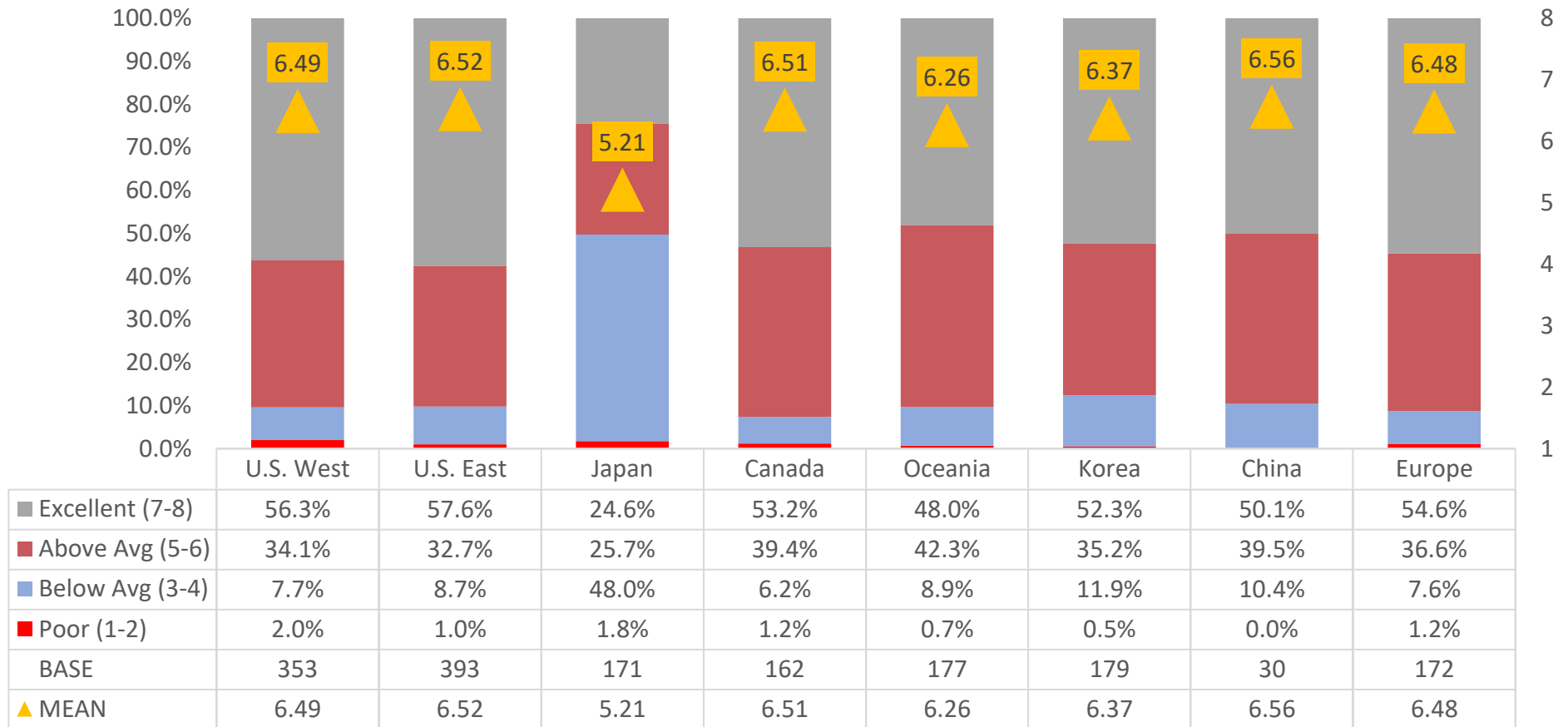
# CULTURAL EXPERIENCES - O'AHU

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



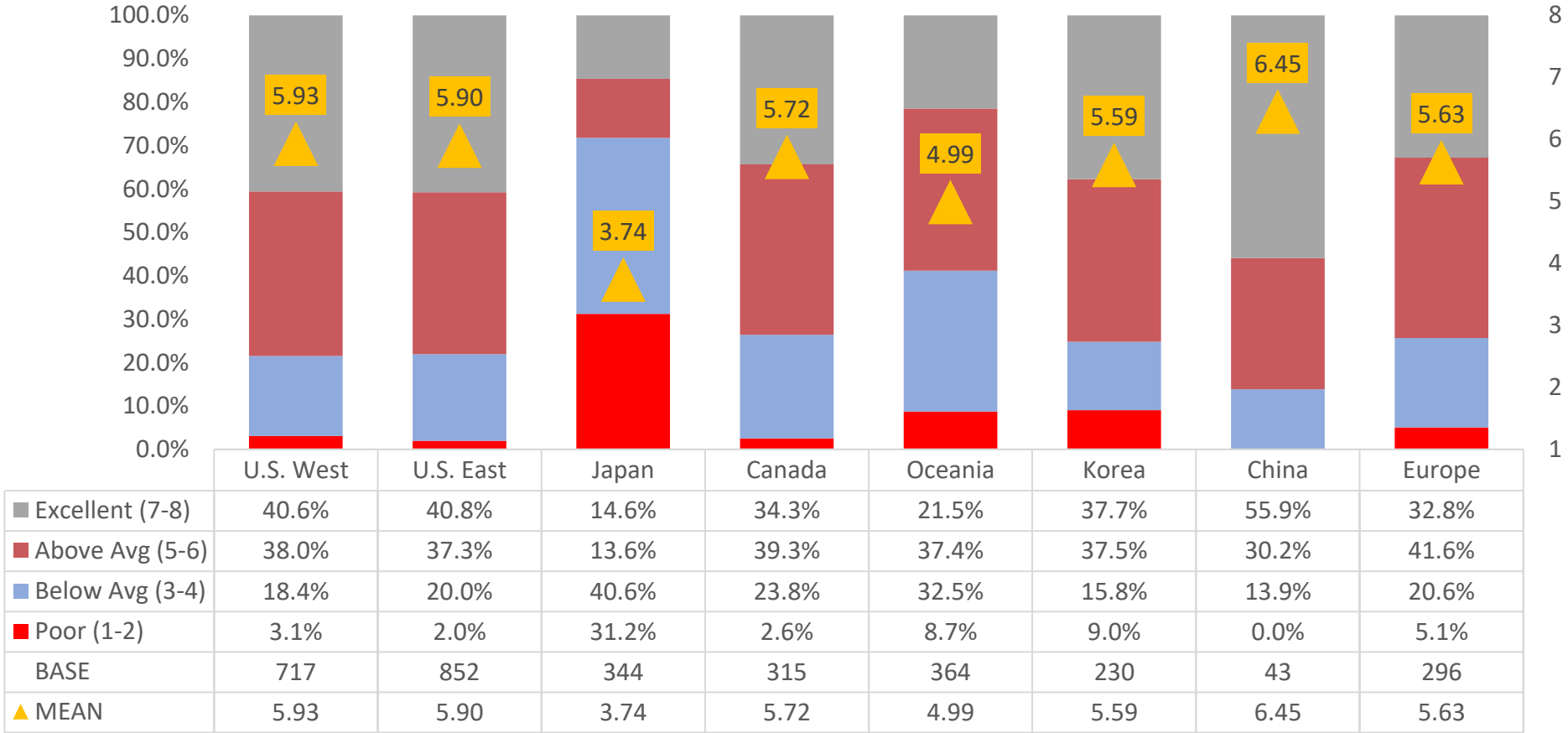
# VOLUNTEER EXPERIENCES - O'AHU

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



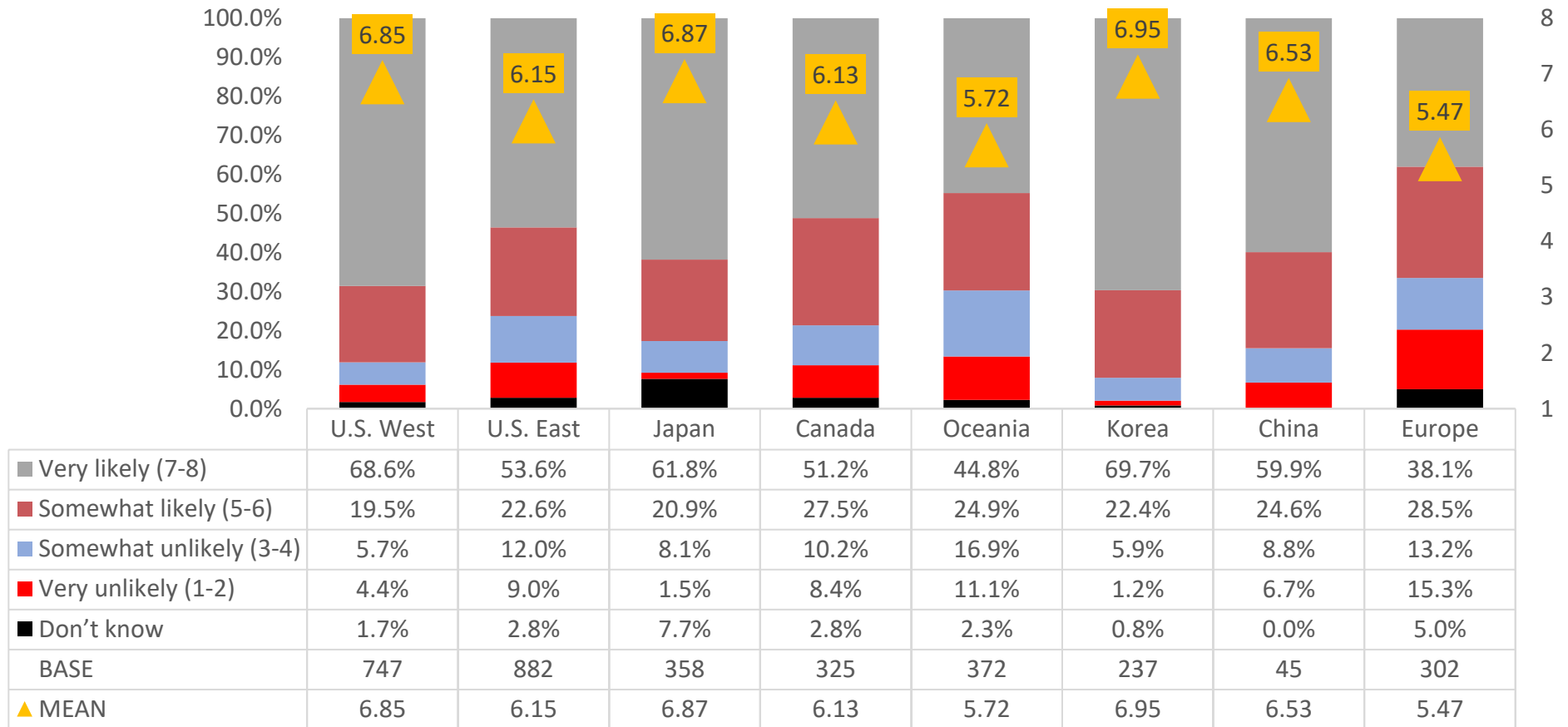
# OVERALL VALUE FOR THE MONEY – O‘AHU

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



# LIKELIHOOD OF RETURN VISIT - O‘AHU

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

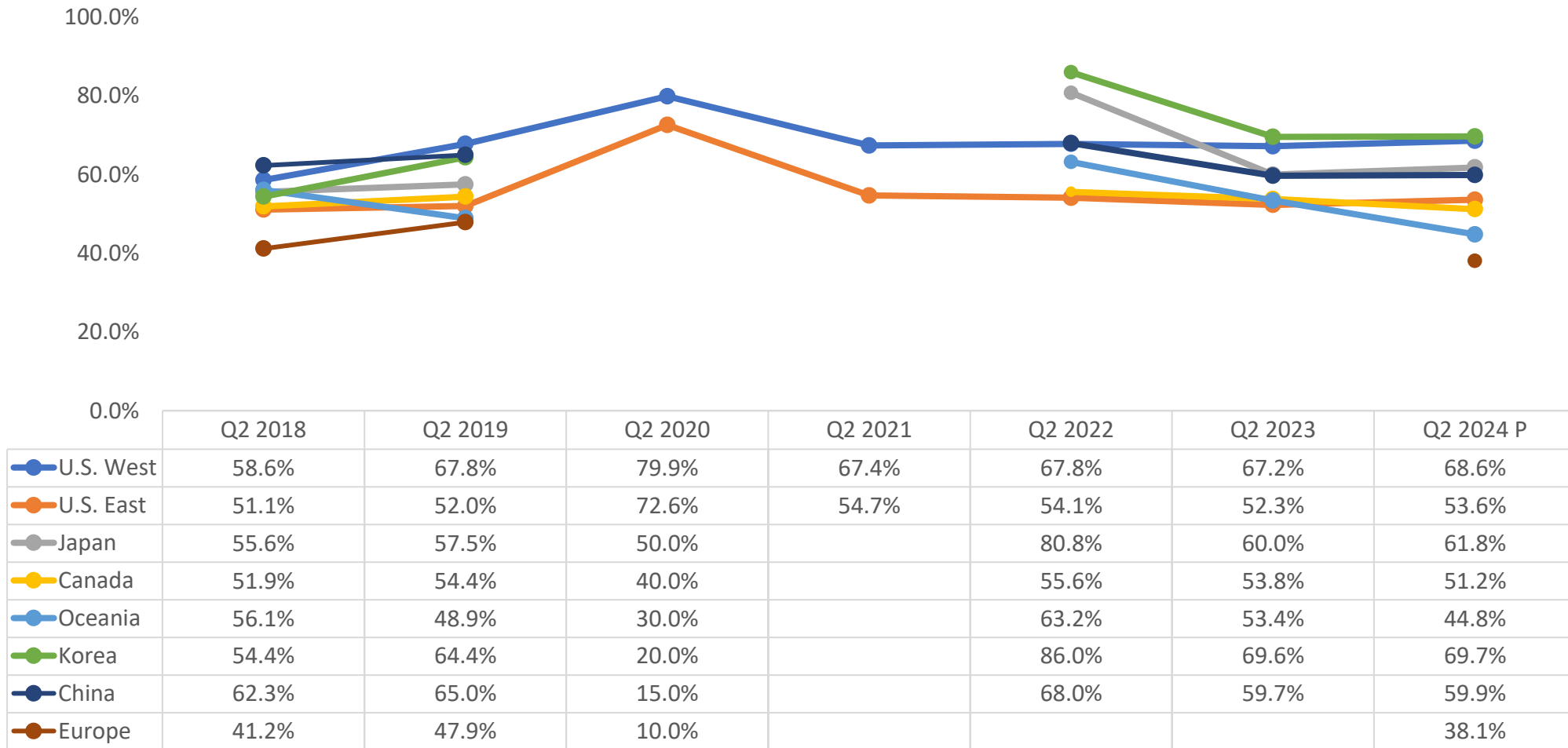




# LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)

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



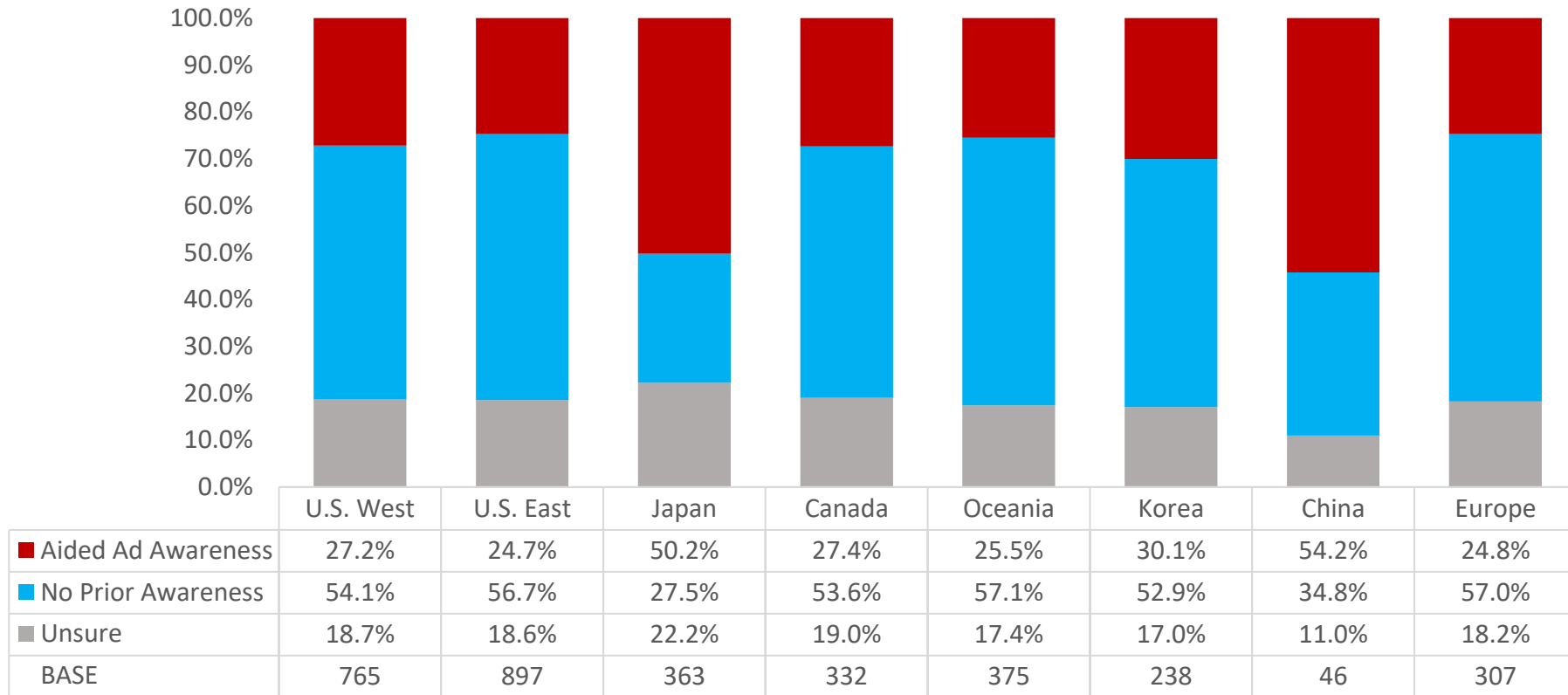
P= Preliminary Data

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.



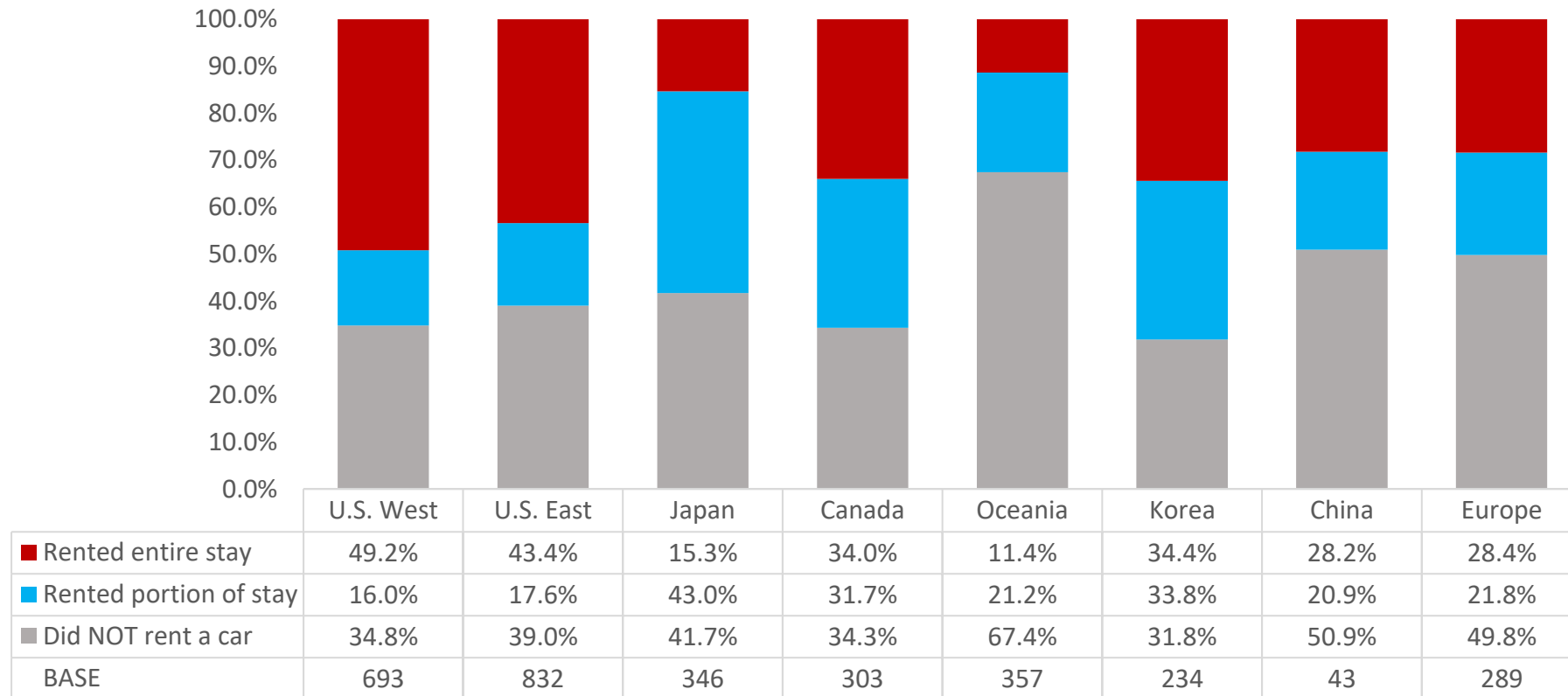
# AIDED ADVERTISING AWARENESS - O'AHU



# MOTIVATING FACTORS - O'AHU

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>Famous landmarks or imagery/<br/>natural beauty</b>     | 41.2%     | 47.0%     | 43.7% | 54.5%  | 48.9%   | 56.8% | 56.7% | 55.6%  |
| <b>Hawaiian cultural events</b>                            | 17.7%     | 15.4%     | 16.9% | 16.4%  | 13.4%   | 19.8% | 4.8%  | 11.8%  |
| <b>Social media posts and videos</b>                       | 14.3%     | 13.2%     | 31.3% | 22.8%  | 11.7%   | 21.7% | 19.3% | 20.4%  |
| <b>Television programs or movies<br/>filmed in Hawai'i</b> | 7.9%      | 10.5%     | 42.9% | 17.0%  | 16.3%   | 21.8% | 17.3% | 29.6%  |
| <b>Outdoor or sporting activities<br/>and events</b>       | 14.8%     | 11.6%     | 11.8% | 18.4%  | 7.9%    | 17.5% | 9.8%  | 11.5%  |
| <b>Hawaiian music</b>                                      | 8.7%      | 6.8%      | 15.8% | 7.8%   | 6.2%    | 11.1% | 1.7%  | 5.3%   |
| <b>BASE</b>  | 759       | 894       | 361   | 331    | 375     | 46    | 237   | 304    |

# CAR RENTAL - O'AHU



# REASONS FOR PARTIAL RENTAL CAR - O‘AHU

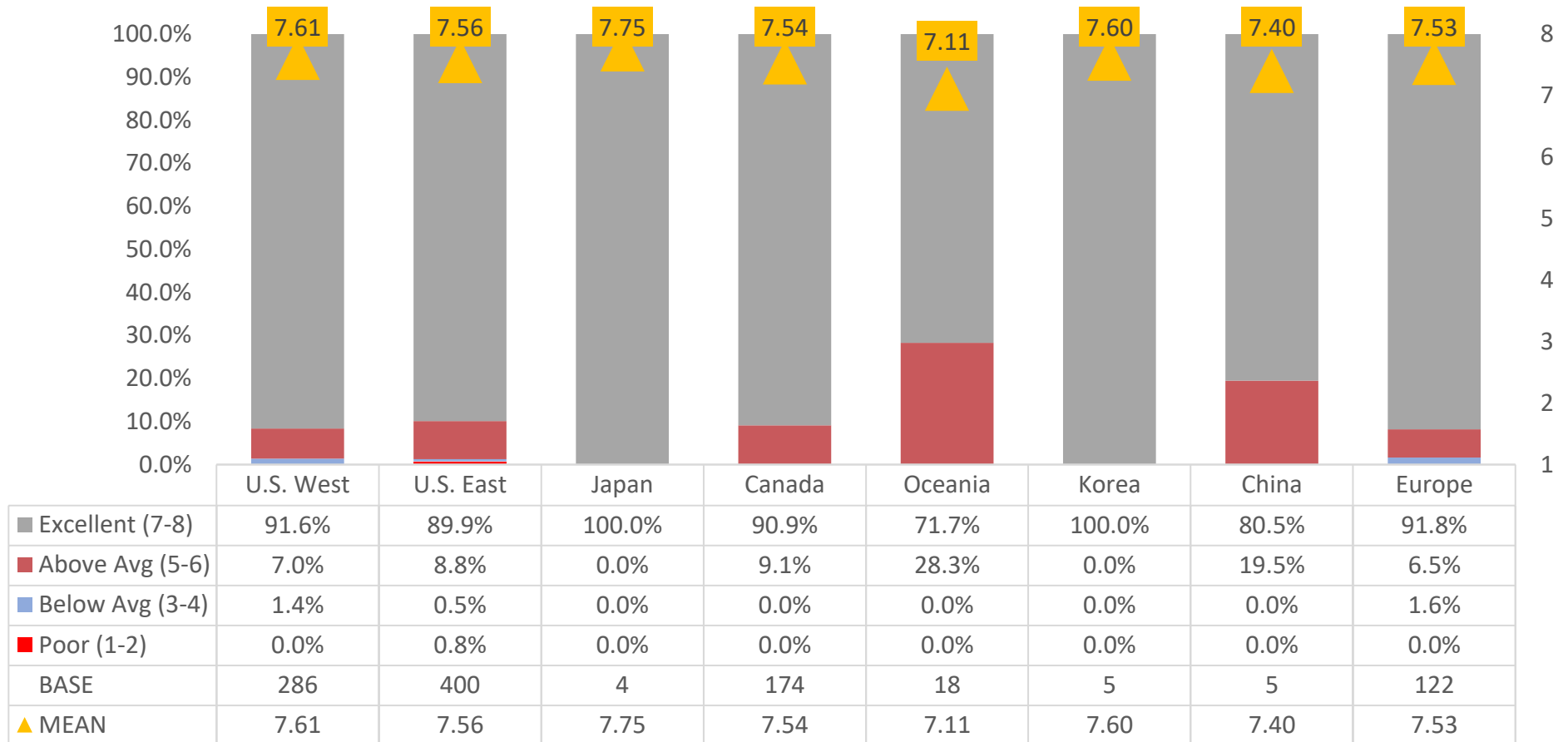
|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| I only needed a vehicle on certain dates             | 70.2%     | 78.2%     | 83.3% | 71.2%  | 83.8%   | 43.8% | 56.7% | 83.9%  |
| Parking was too expensive at my hotel/ lodging       | 44.1%     | 35.3%     | 13.1% | 42.6%  | 28.5%   | 32.9% | 41.5% | 37.1%  |
| Car rental rates were too expensive                  | 23.4%     | 15.5%     | 15.9% | 31.0%  | 24.0%   | 11.0% | 30.4% | 24.2%  |
| Wanted to reduce my carbon footprint                 | 9.0%      | 4.8%      | 3.7%  | 9.6%   | 6.7%    | 11.0% | 0.0%  | 16.1%  |
| Vehicles were not available for all of my trip dates | 4.5%      | 3.4%      | 2.7%  | 1.1%   | 0.0%    | 34.2% | 8.9%  | 1.6%   |
| BASE   | 111       | 144       | 148   | 94     | 77      | 9     | 79    | 62     |



# Section 6 – Kaua‘i

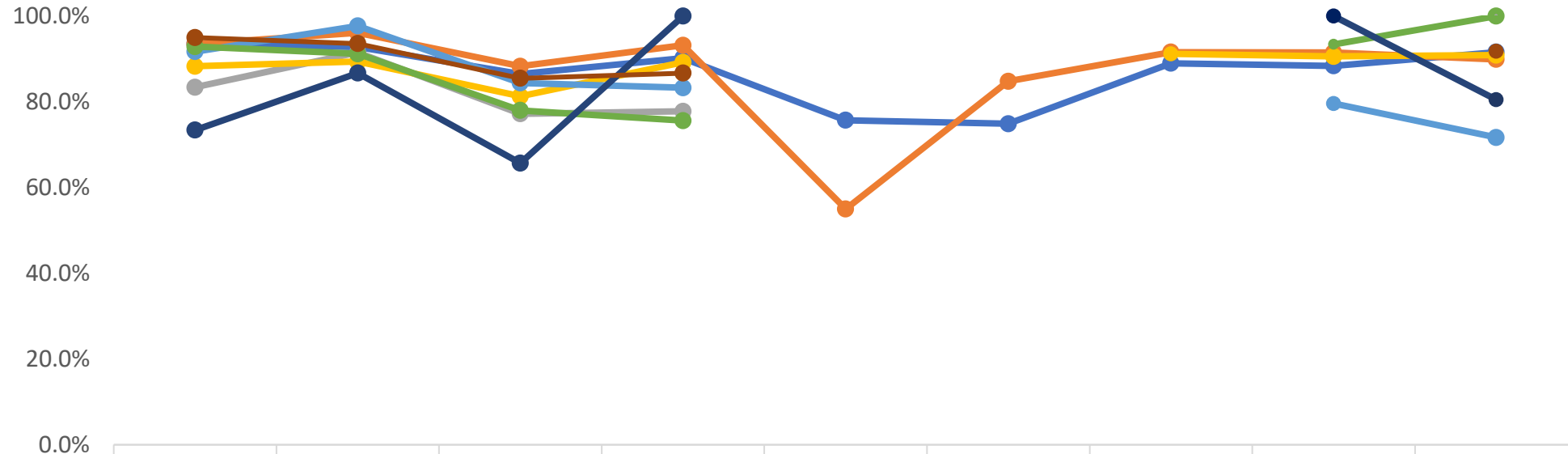
# SATISFACTION - KAUA'I

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



# SATISFACTION - KAUAI

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



|           | Q2 2016 | Q2 2017 | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 93.6%   | 92.8%   | 86.5%   | 90.2%   | 75.7%   | 74.9%   | 89.0%   | 88.4%   | 91.6%     |
| U.S. East | 93.5%   | 96.1%   | 88.3%   | 93.2%   | 55.0%   | 84.8%   | 91.6%   | 91.5%   | 89.9%     |
| Japan     | 83.4%   | 91.5%   | 77.2%   | 77.8%   | 40.0%   |         |         |         | 100.0%    |
| Canada    | 88.3%   | 89.4%   | 81.3%   | 89.2%   | 35.0%   |         | 91.2%   | 90.6%   | 90.9%     |
| Oceania   | 91.7%   | 97.7%   | 84.4%   | 83.3%   | 30.0%   |         |         | 79.6%   | 71.7%     |
| Korea     | 92.9%   | 91.2%   | 78.0%   | 75.6%   | 25.0%   |         |         | 93.4%   | 100.0%    |
| China     | 73.4%   | 86.7%   | 65.7%   | 100.0%  | 20.0%   |         |         | 100.0%  | 80.5%     |
| Europe    | 95.0%   | 93.6%   | 85.5%   | 86.7%   | 15.0%   |         |         |         | 91.8%     |

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 \_\_\_?

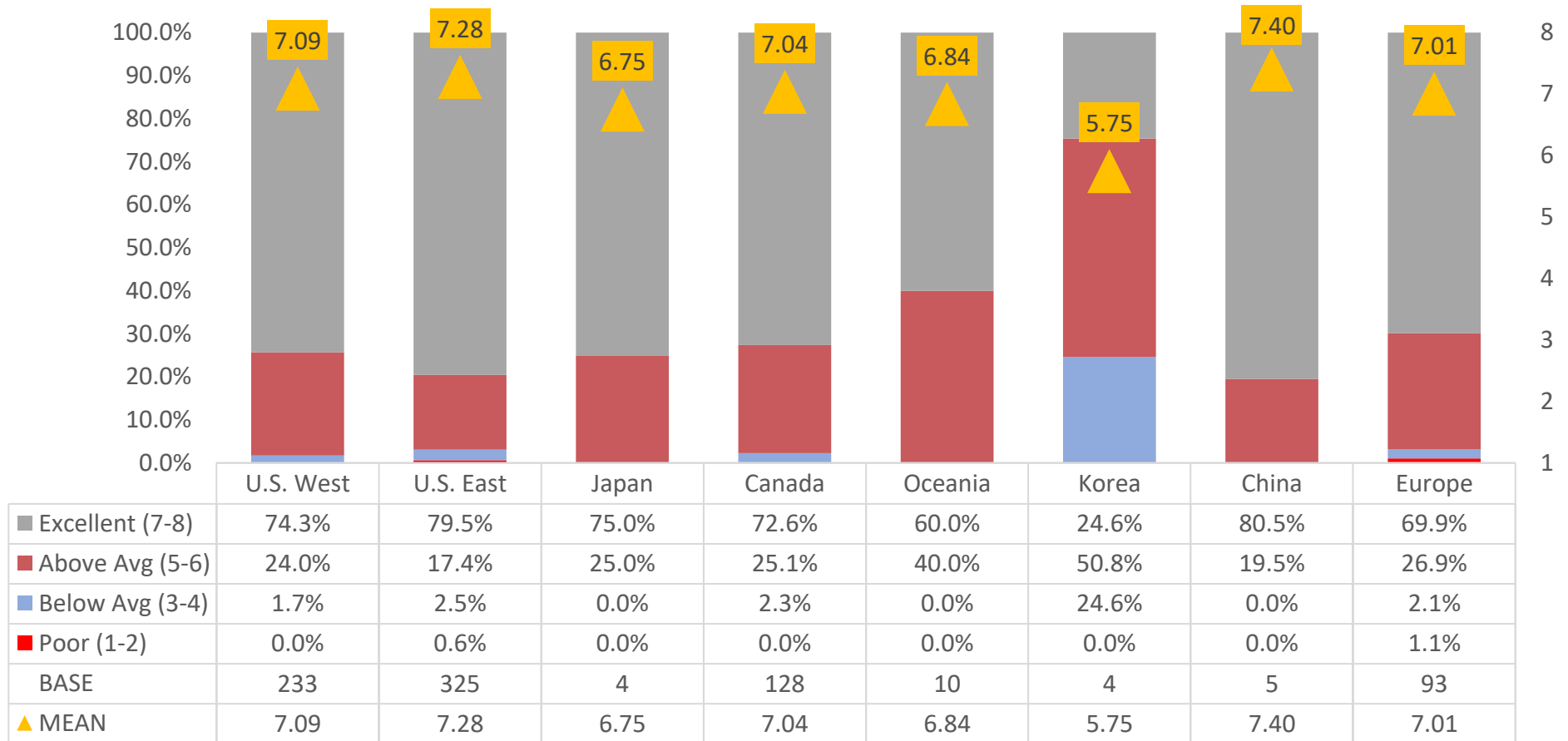
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.





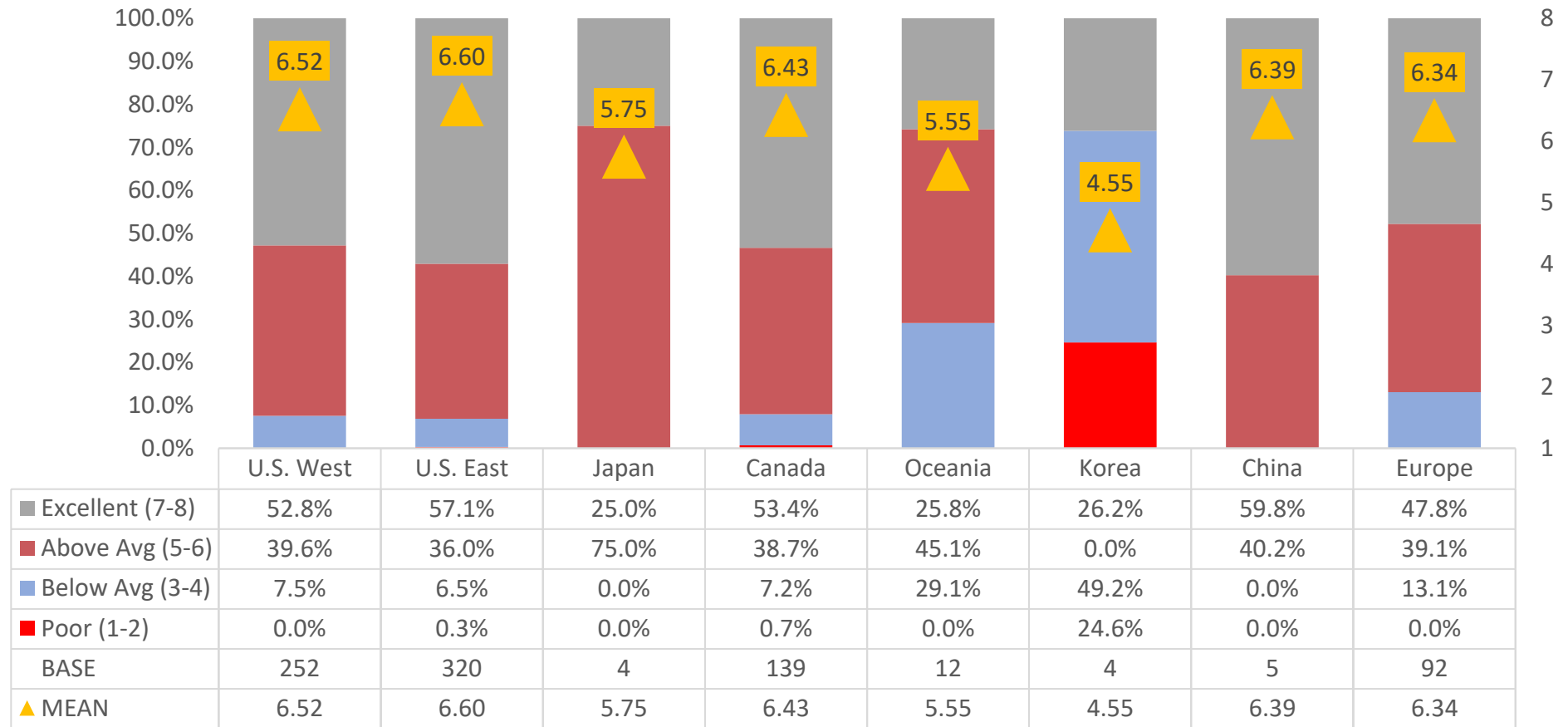
# ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



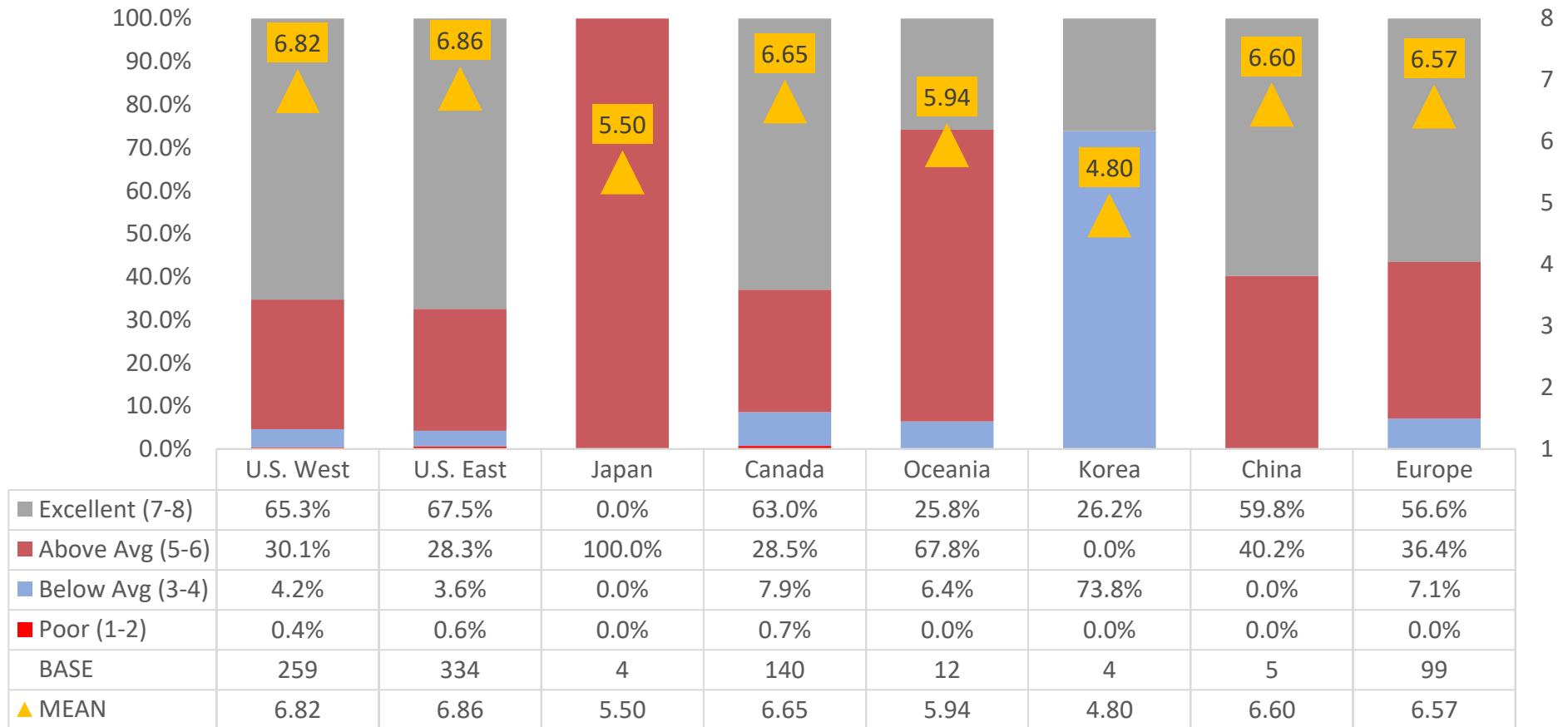
# SHOPPING - KAUA'I

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



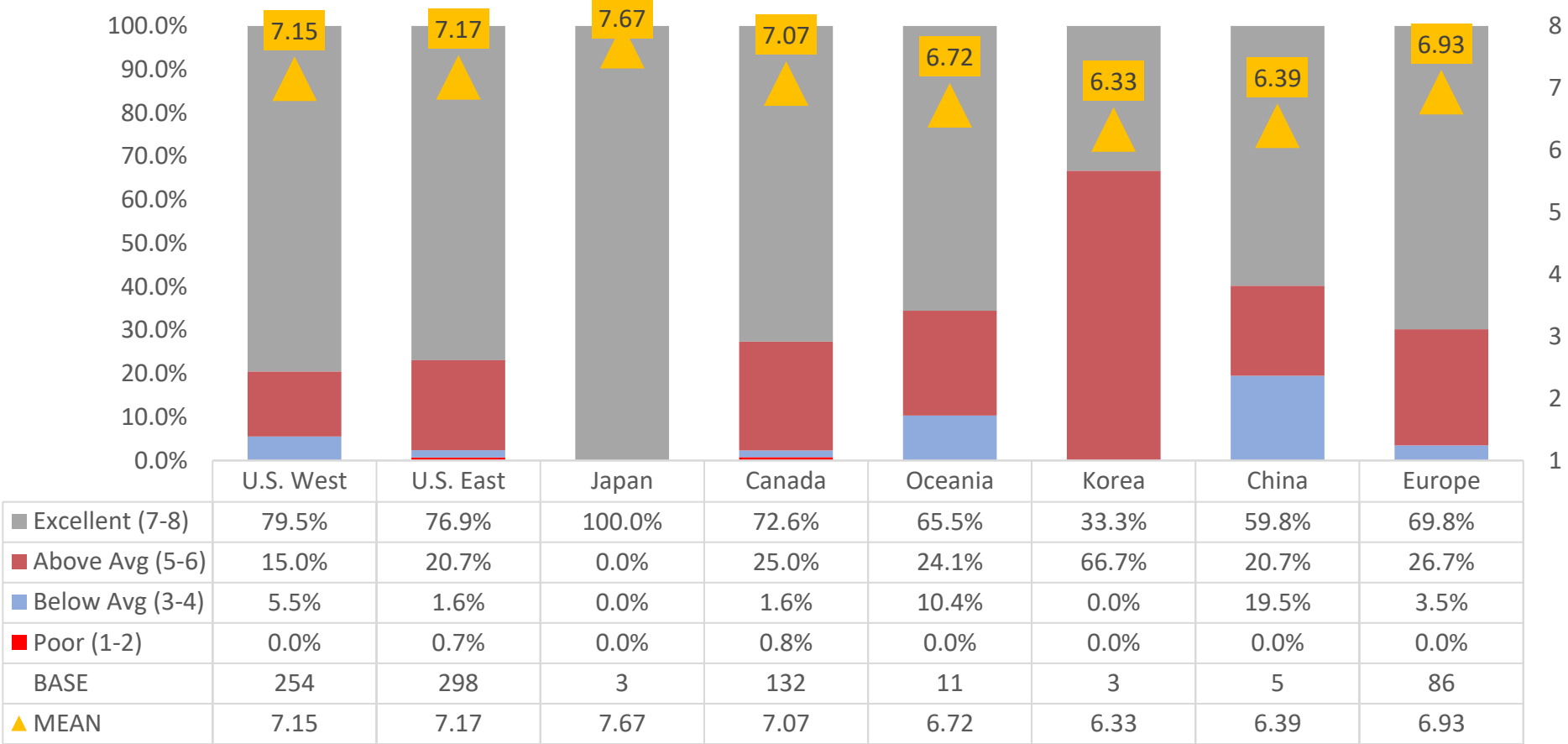
# DINING/ FOOD & BEVERAGE - KAUA'I

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



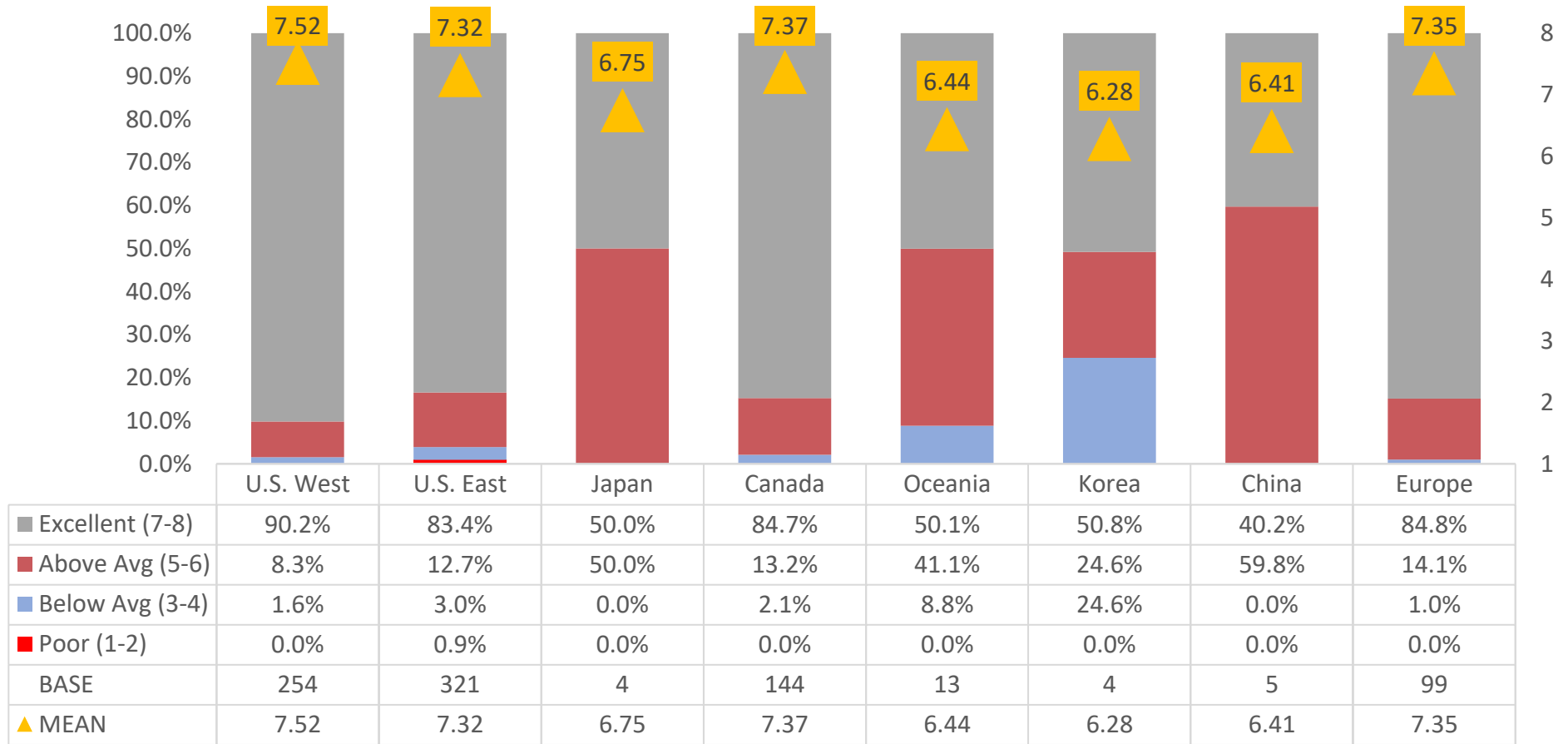
# LODGING/ ACCOMMODATIONS - KAUA'I

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



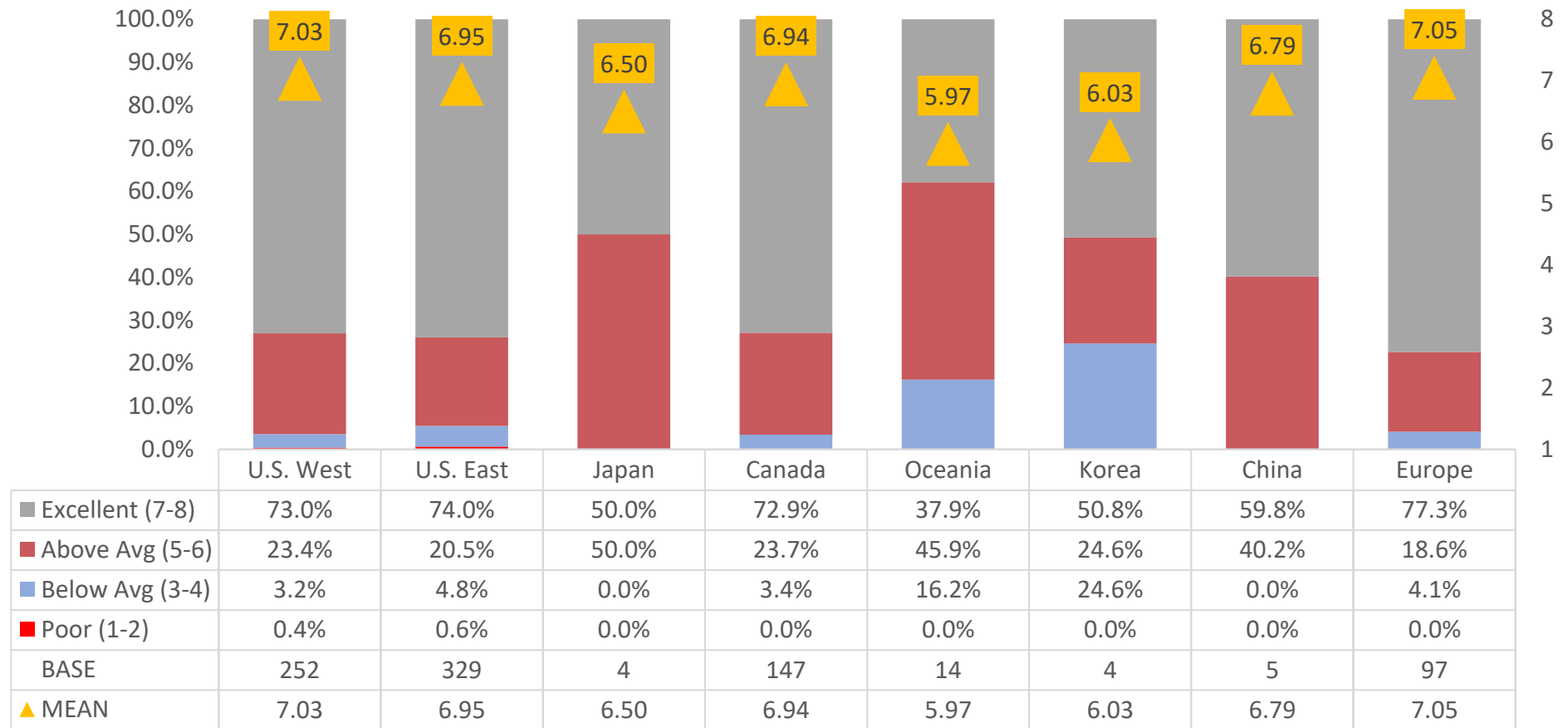
# BEACHES - KAUA'I

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



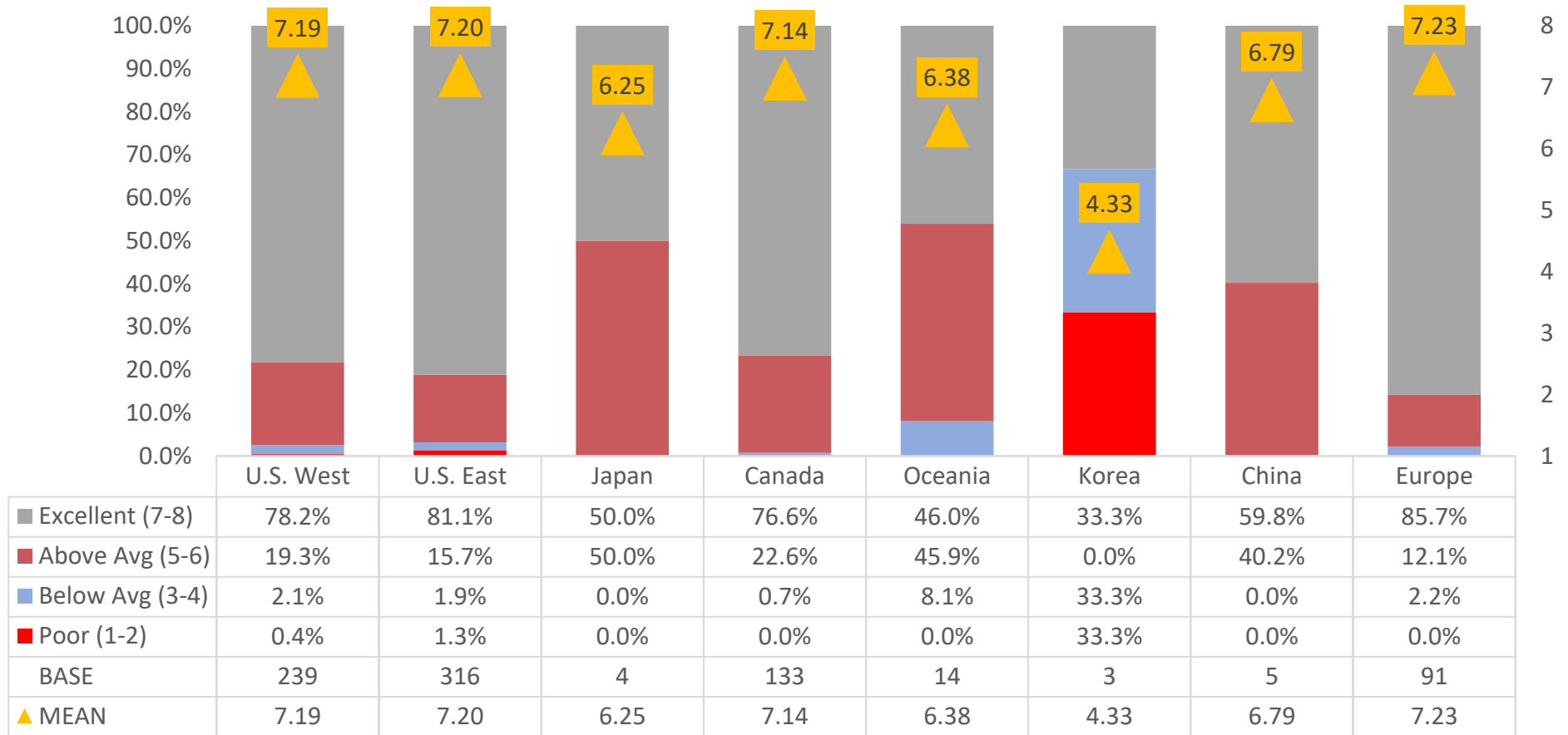
# PUBLIC AREAS - KAUA'I

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



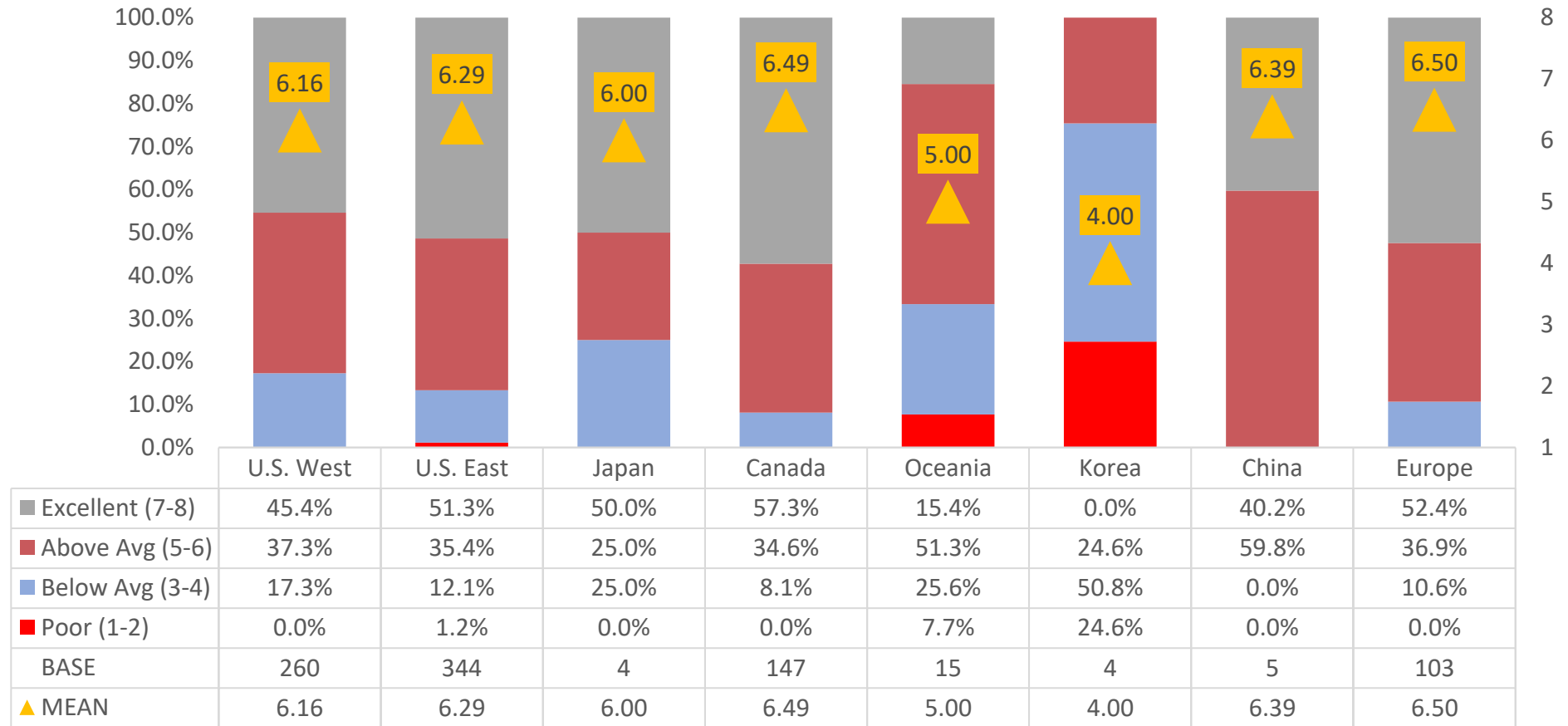
# PARKS - KAUA'I

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



# ROADS - KAUA'I

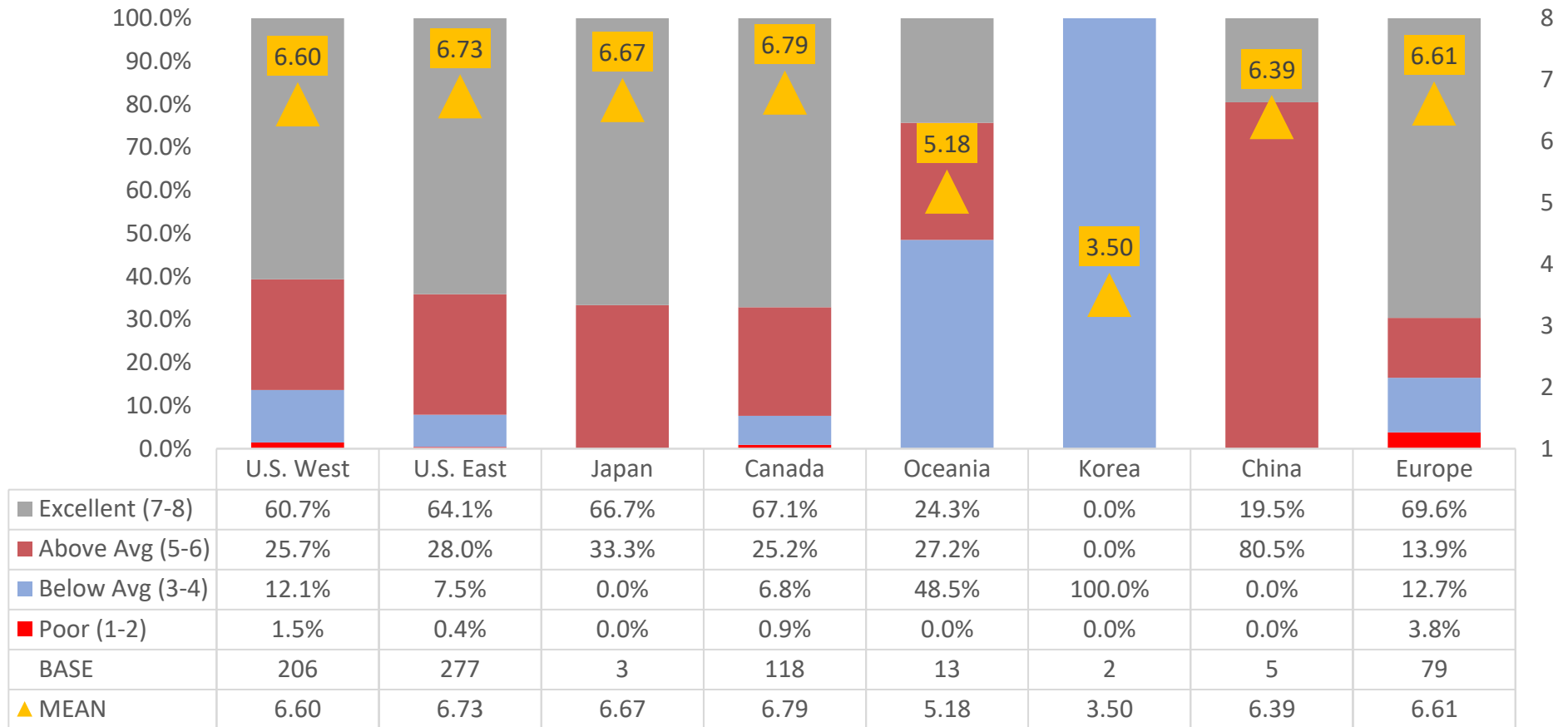
8-pt Rating Scale  
8 = Excellent / 1 = Poor





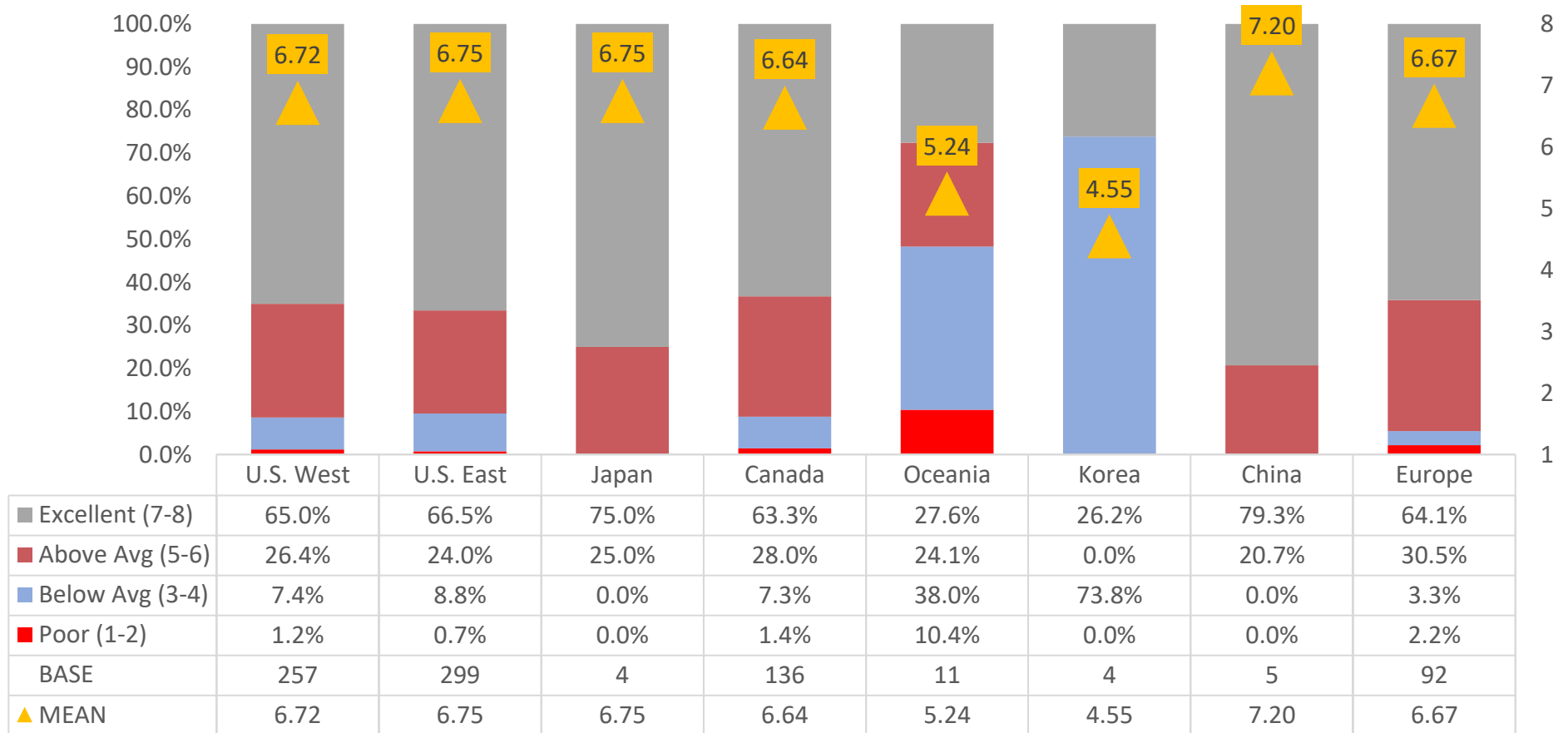
# TRANSPORTATION ON ISLAND - KAUA'I

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



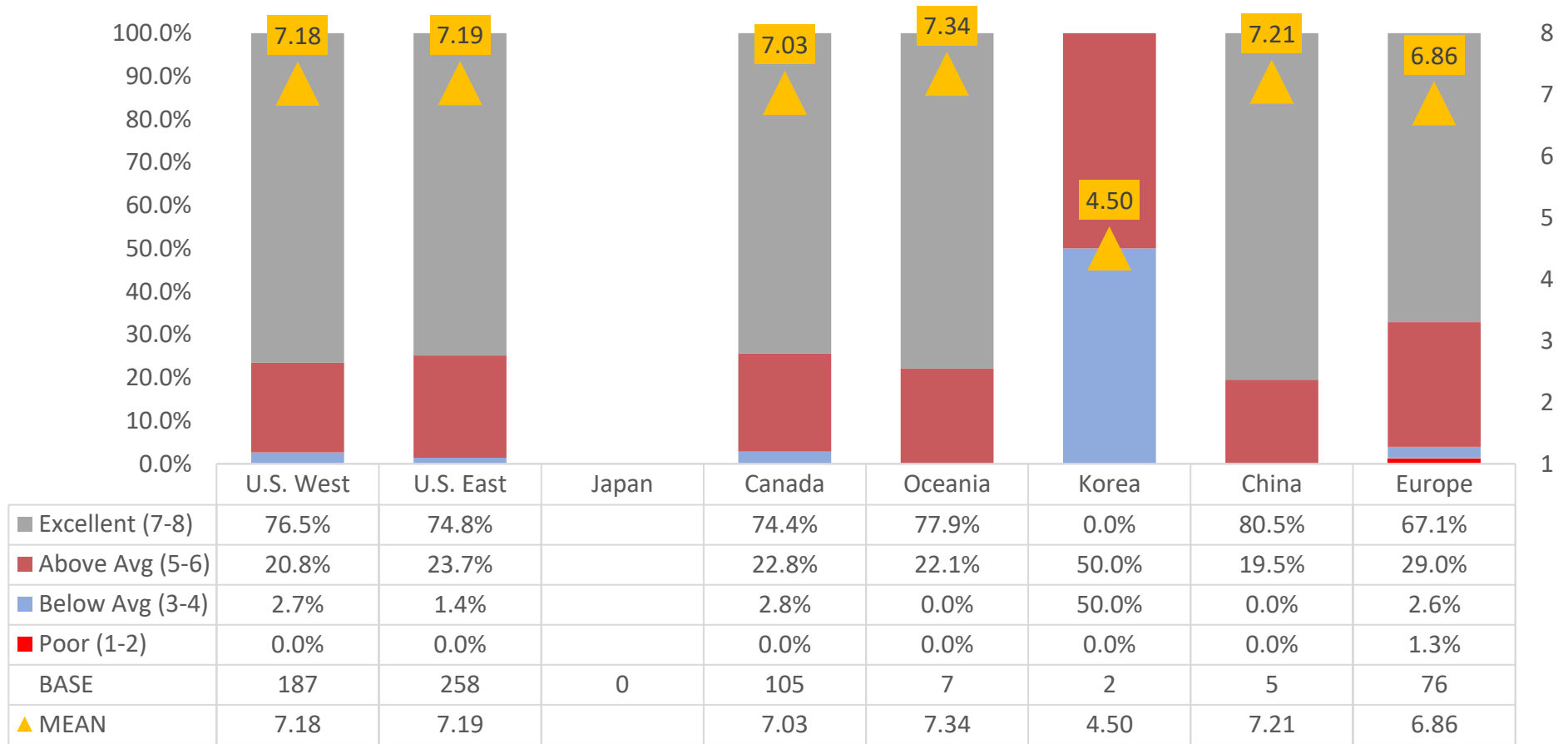
# AIRPORT- KAUA'I

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



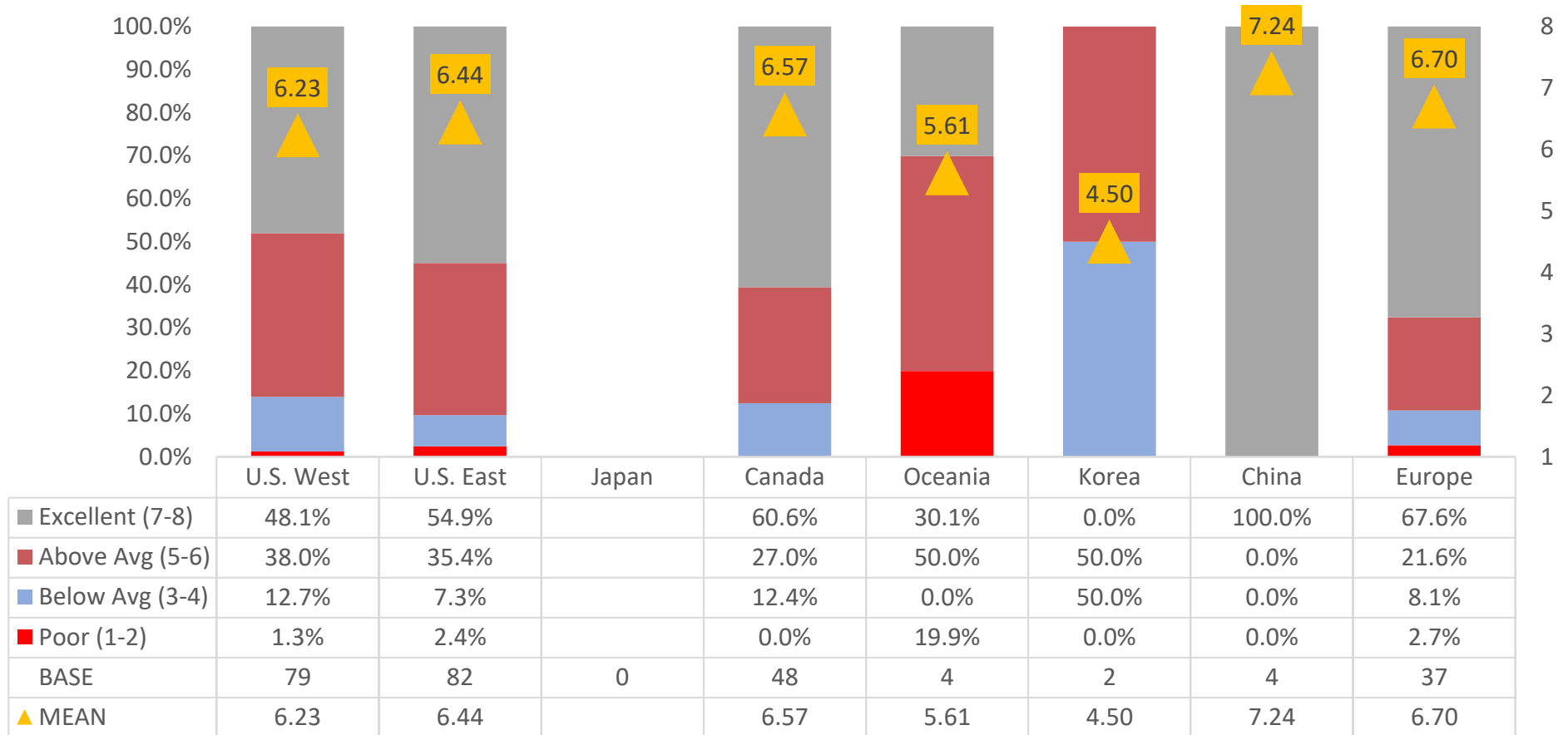
# CULTURAL ACTIVITIES - KAUA'I

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



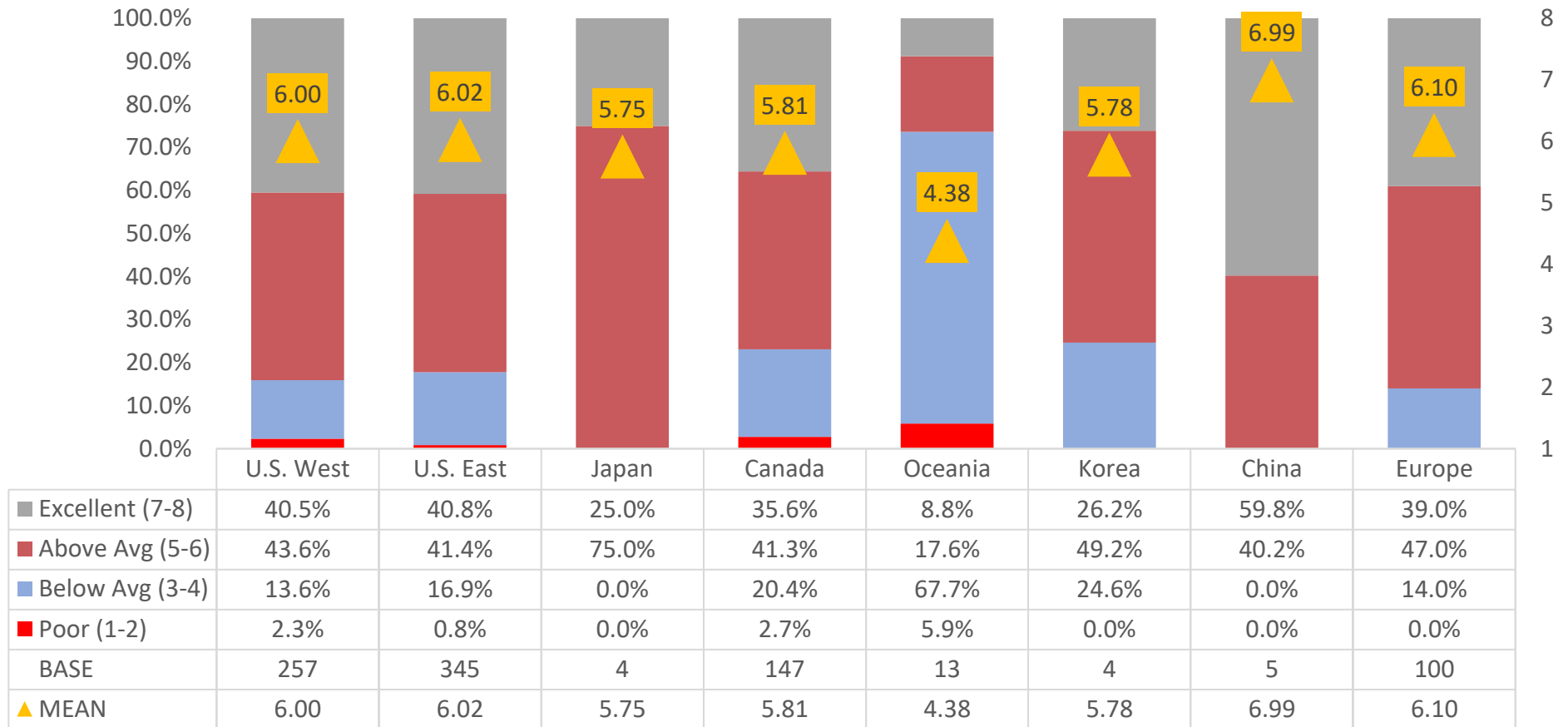
# VOLUNTEER ACTIVITIES - KAUA'I

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



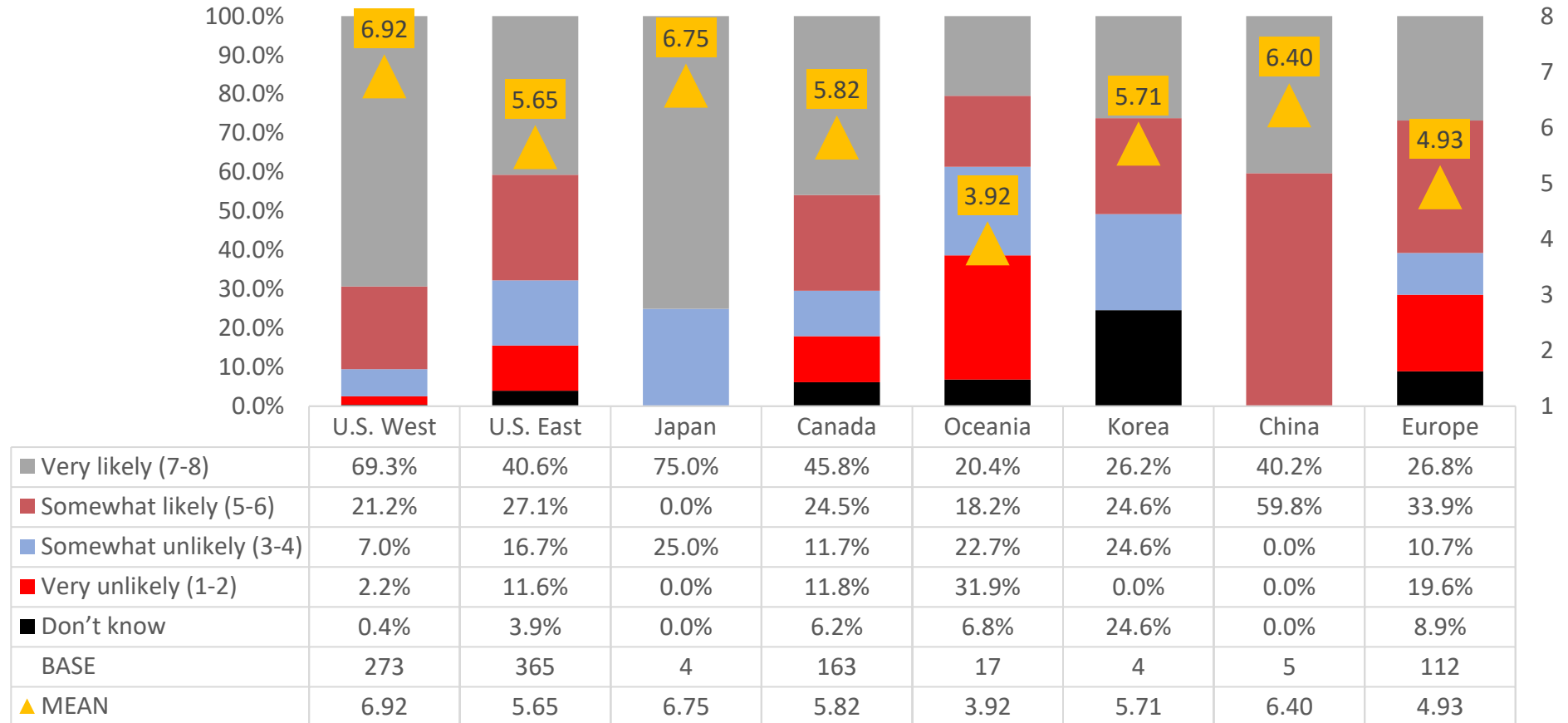
# VALUE FOR THE MONEY- KAUA'I

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



# LIKELIHOOD OF RETURN VISIT - KAUA'I

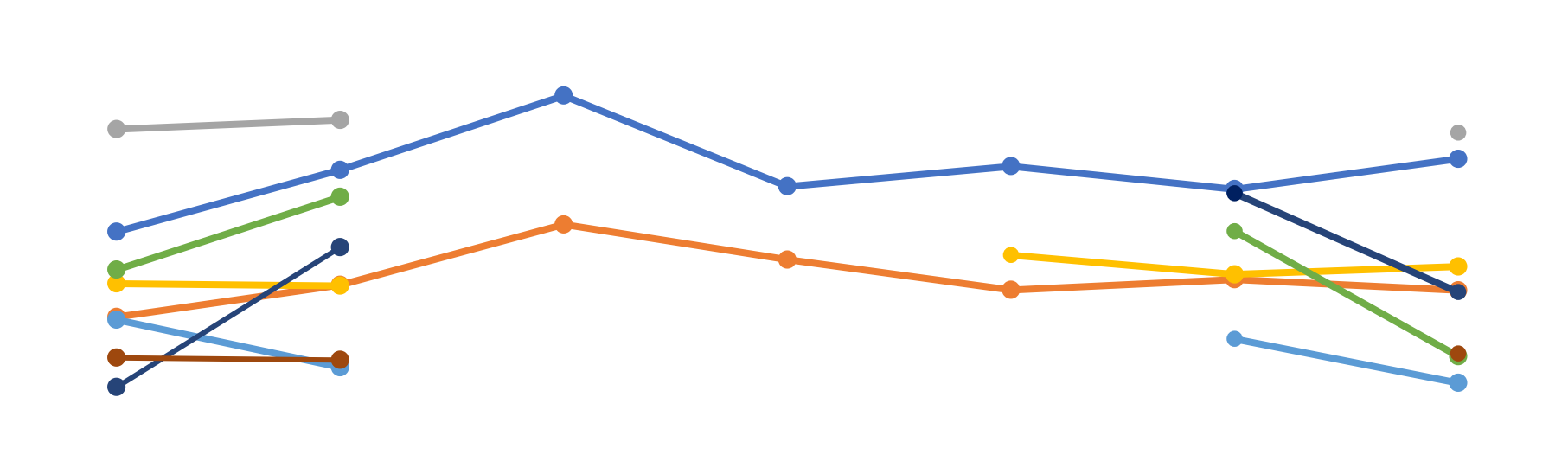
8-pt Rating Scale  
8 = Very likely / 1 = Very unlikely



# LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

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

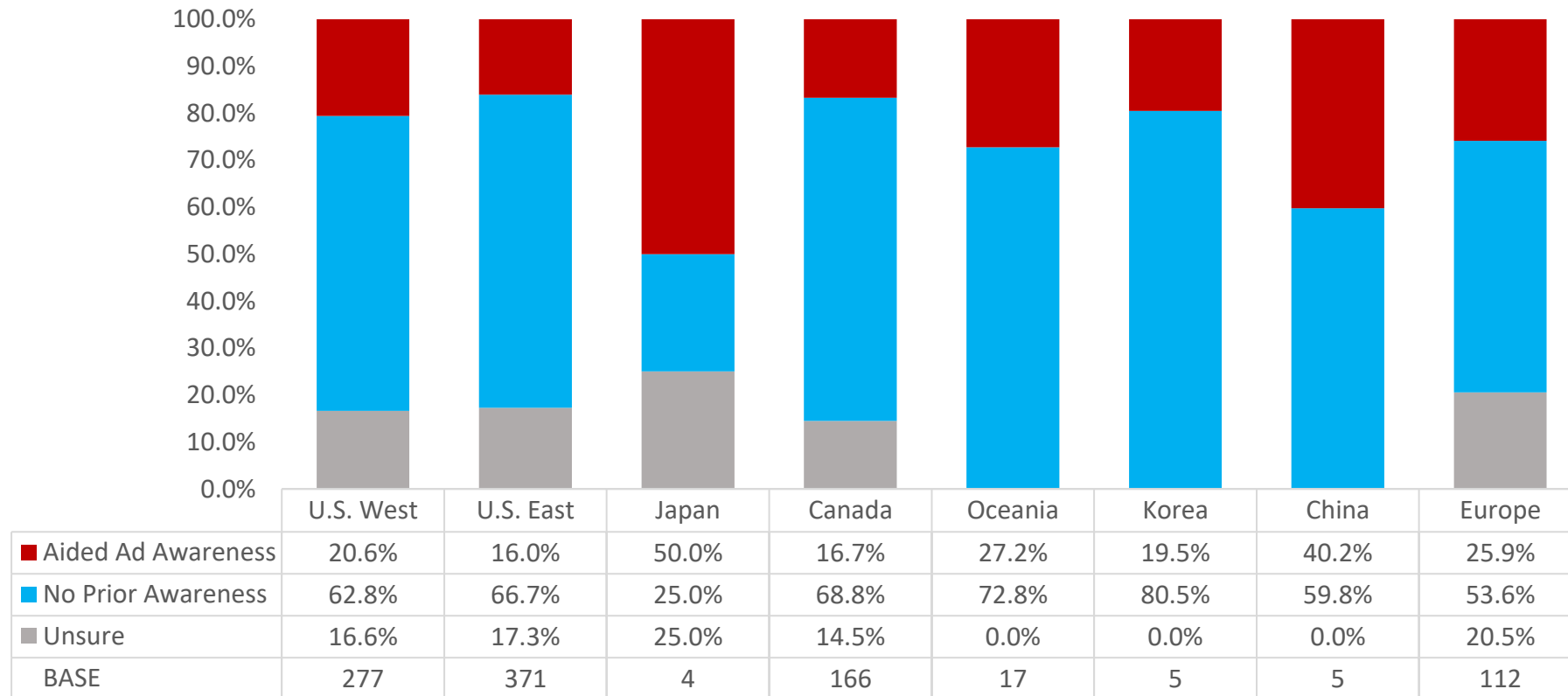


|           | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 53.4%   | 66.9%   | 83.1%   | 63.3%   | 67.7%   | 62.7%   | 69.3%     |
| U.S. East | 34.8%   | 41.8%   | 55.0%   | 47.3%   | 40.7%   | 43.0%   | 40.6%     |
| Japan     | 75.8%   | 77.8%   |         |         |         |         | 75.0%     |
| Canada    | 42.1%   | 41.6%   |         |         | 48.3%   | 44.1%   | 45.8%     |
| Oceania   | 34.2%   | 23.8%   |         |         |         | 30.0%   | 20.4%     |
| Korea     | 45.1%   | 61.0%   |         |         |         | 53.5%   | 26.2%     |
| China     | 19.5%   | 50.0%   |         |         |         | 61.8%   | 40.2%     |
| Europe    | 25.9%   | 25.4%   |         |         |         |         | 26.8%     |

P= Preliminary Data

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

# AIDED ADVERTISING AWARENESS - KAUA'I



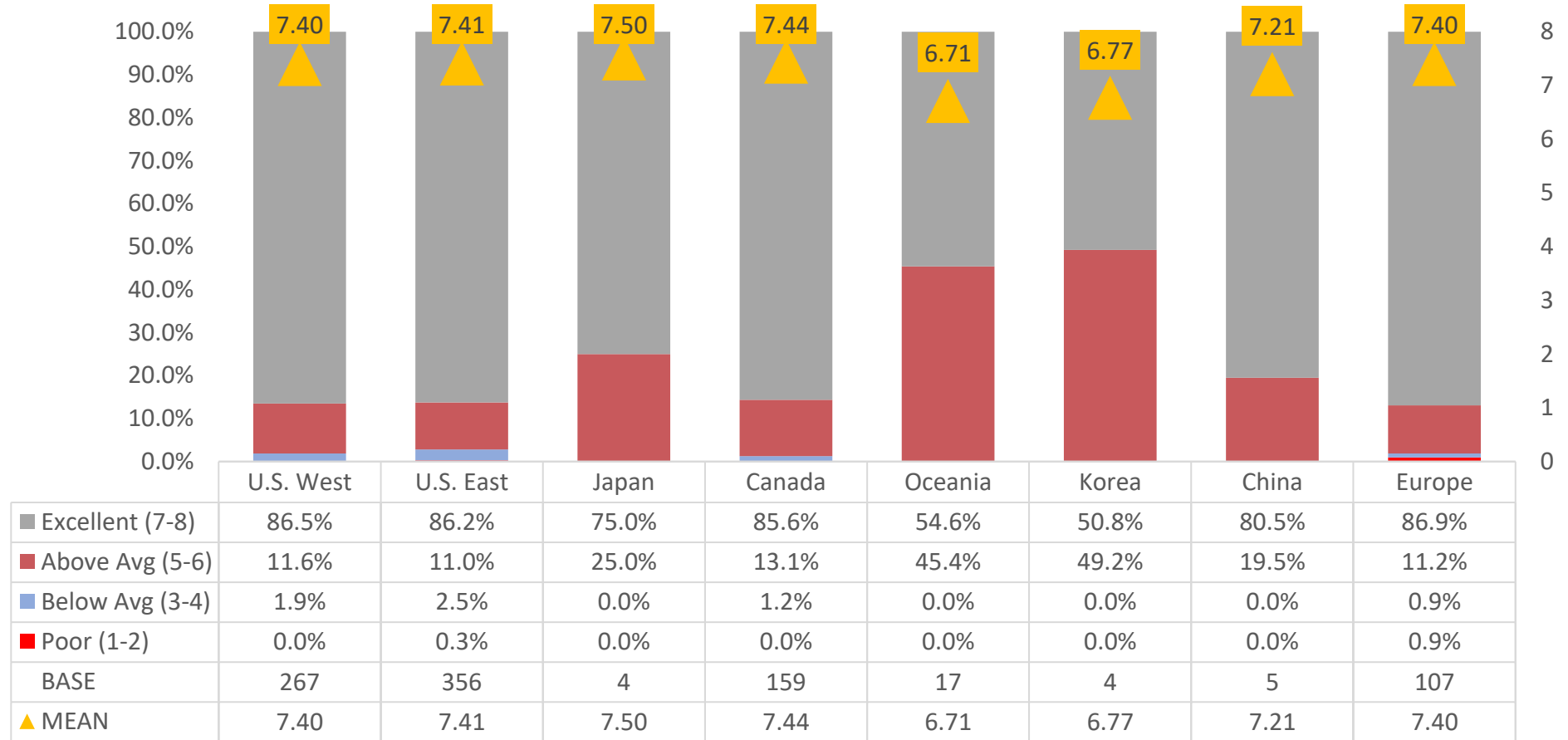


# MOTIVATING FACTORS - KAUA'I

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>Famous landmarks or imagery/<br/>natural beauty</b>     | 46.6%     | 46.6%     | 50.0% | 43.9%  | 34.1%   | 80.5% | 58.5% | 57.2%  |
| <b>Outdoor or sporting activities<br/>and events</b>       | 16.2%     | 18.4%     | 25.0% | 15.5%  | 4.5%    | 41.5% | 0.0%  | 14.3%  |
| <b>Social media posts and videos</b>                       | 9.4%      | 11.0%     | 0.0%  | 12.0%  | 15.9%   | 20.7% | 19.5% | 16.1%  |
| <b>Hawaiian cultural events</b>                            | 6.9%      | 5.7%      | 0.0%  | 4.2%   | 6.8%    | 0.0%  | 0.0%  | 4.5%   |
| <b>Television programs or movies<br/>filmed in Hawai'i</b> | 3.6%      | 7.3%      | 25.0% | 4.2%   | 6.8%    | 19.5% | 0.0%  | 17.8%  |
| <b>Hawaiian music</b>                                      | 4.7%      | 2.8%      | 0.0%  | 3.0%   | 0.0%    | 0.0%  | 0.0%  | 2.7%   |
| <b>BASE</b>  | 277       | 371       | 4     | 166    | 17      | 5     | 5     | 112    |

# FRIENDLINESS OF KAUA‘I RESIDENTS

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



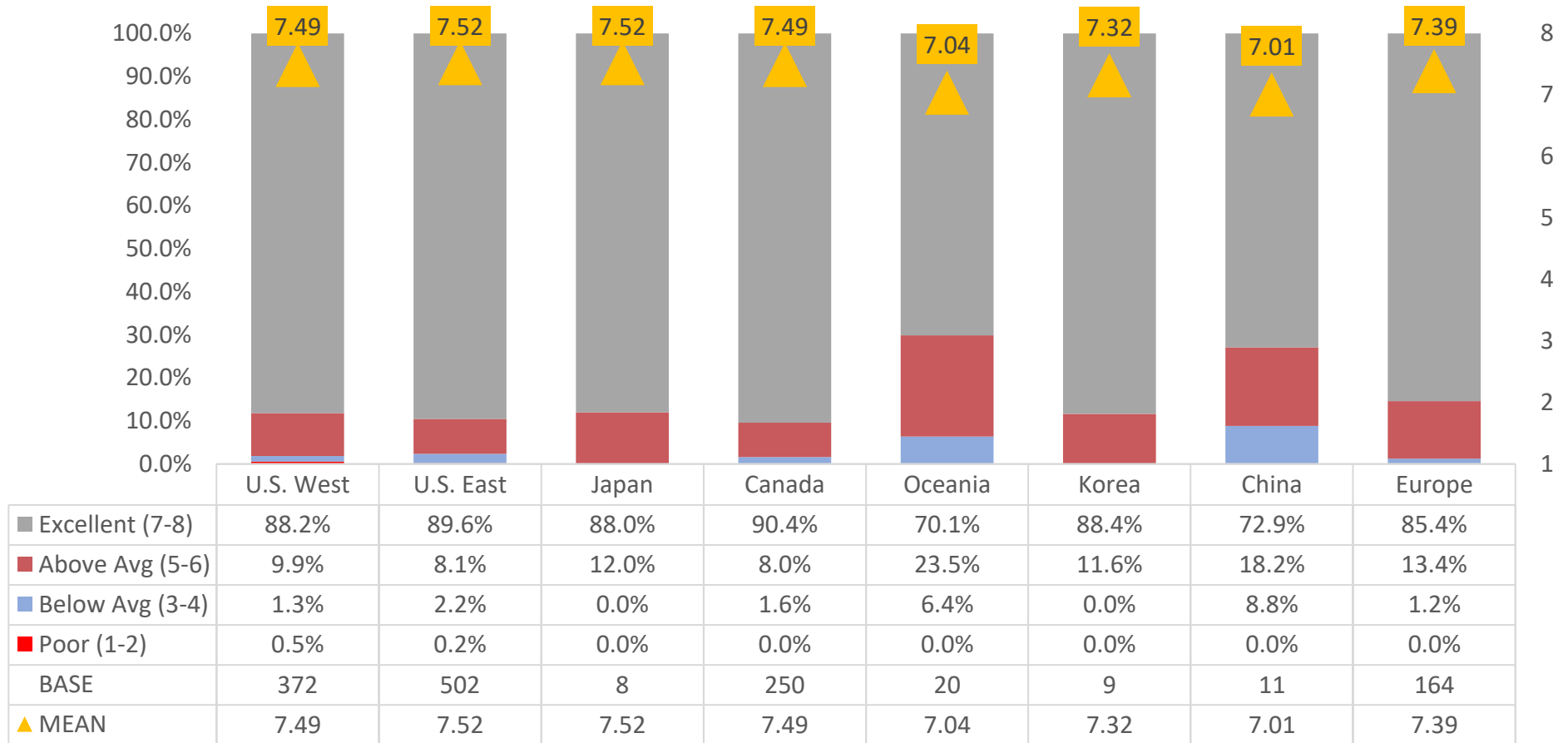
# TOP TRIP INFLUENCERS - KAUA'I

|   | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Been here before                                | 48.8%     | 24.9%     | 25.0% | 31.2%  | 4.7%    | 0.0%  | 0.0%  | 8.7%   |
| Friend recommendation                           | 25.2%     | 29.7%     | 50.0% | 28.7%  | 19.1%   | 19.5% | 0.0%  | 26.2%  |
| Cruise line stop/part of tour                   | 0.8%      | 13.7%     | 0.0%  | 10.1%  | 33.4%   | 19.5% | 0.0%  | 13.6%  |
| Visiting Family/ Friends                        | 5.1%      | 4.3%      | 0.0%  | 4.0%   | 0.0%    | 0.0%  | 26.2% | 4.8%   |
| Social Media Post                               | 3.1%      | 3.8%      | 0.0%  | 4.7%   | 7.2%    | 40.2% | 24.6% | 5.8%   |
| Article/ Blog                                   | 2.0%      | 5.4%      | 0.0%  | 4.7%   | 4.7%    | 0.0%  | 49.2% | 8.7%   |
| Travel Agent                                    | 1.9%      | 2.9%      | 0.0%  | 2.0%   | 7.2%    | 0.0%  | 0.0%  | 15.6%  |
| Location/ Never been, but went to other islands | 2.3%      | 1.8%      | 25.0% | 0.7%   | 4.7%    | 0.0%  | 0.0%  | 1.9%   |
| Own a timeshare                                 | 2.3%      | 2.0%      | 0.0%  | 0.0%   | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Nature/ Beauty/ Scenery                         | 1.2%      | 2.6%      | 0.0%  | 0.7%   | 0.0%    | 20.7% | 0.0%  | 1.0%   |

# Section 7 – Maui

# SATISFACTION - MAUI

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

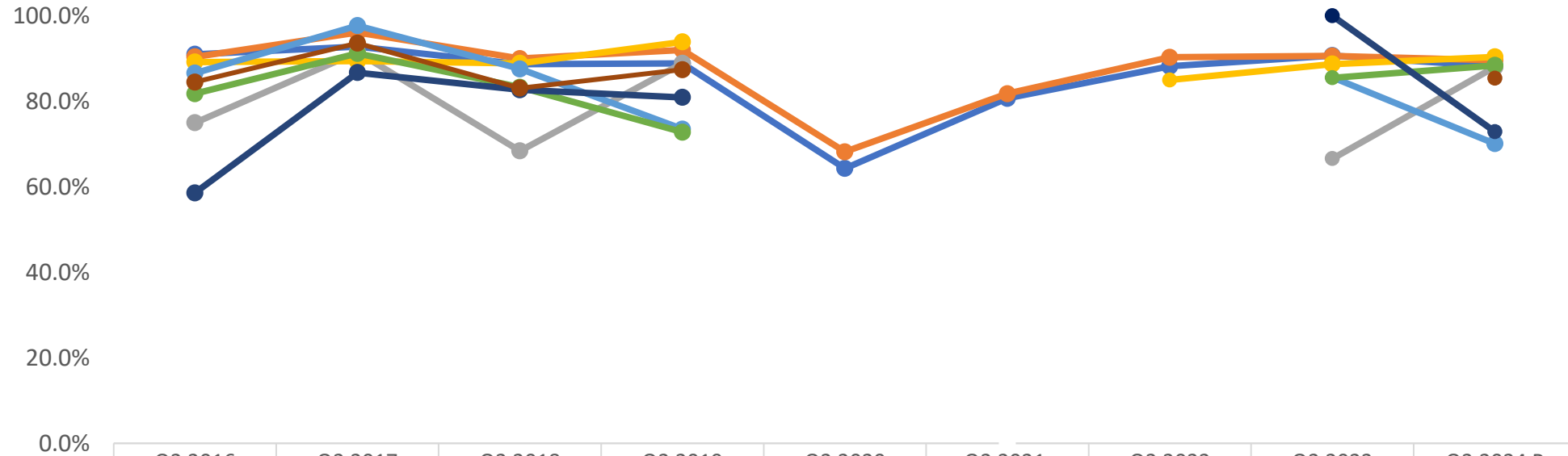


# SATISFACTION - MAUI

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents.
- **Education:** Visitors from **U.S. East** 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)



|           | Q2 2016 | Q2 2017 | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 91.0%   | 92.8%   | 88.7%   | 88.9%   | 64.3%   | 80.7%   | 88.2%   | 90.7%   | 88.2%     |
| U.S. East | 90.4%   | 96.1%   | 90.0%   | 92.0%   | 68.2%   | 81.8%   | 90.3%   | 90.6%   | 89.6%     |
| Japan     | 75.0%   | 91.5%   | 68.4%   | 88.9%   |         |         |         | 66.6%   | 88.0%     |
| Canada    | 89.2%   | 89.4%   | 88.9%   | 93.9%   |         |         | 85.0%   | 88.7%   | 90.4%     |
| Oceania   | 86.6%   | 97.7%   | 87.6%   | 73.5%   |         |         |         | 85.6%   | 70.1%     |
| Korea     | 81.8%   | 91.2%   | 83.3%   | 72.8%   |         |         |         | 85.5%   | 88.4%     |
| China     | 58.6%   | 86.7%   | 82.7%   | 80.9%   |         |         |         | 100.0%  | 72.9%     |
| Europe    | 84.5%   | 93.6%   | 83.1%   | 87.4%   |         |         |         |         | 85.4%     |

P= Preliminary Data

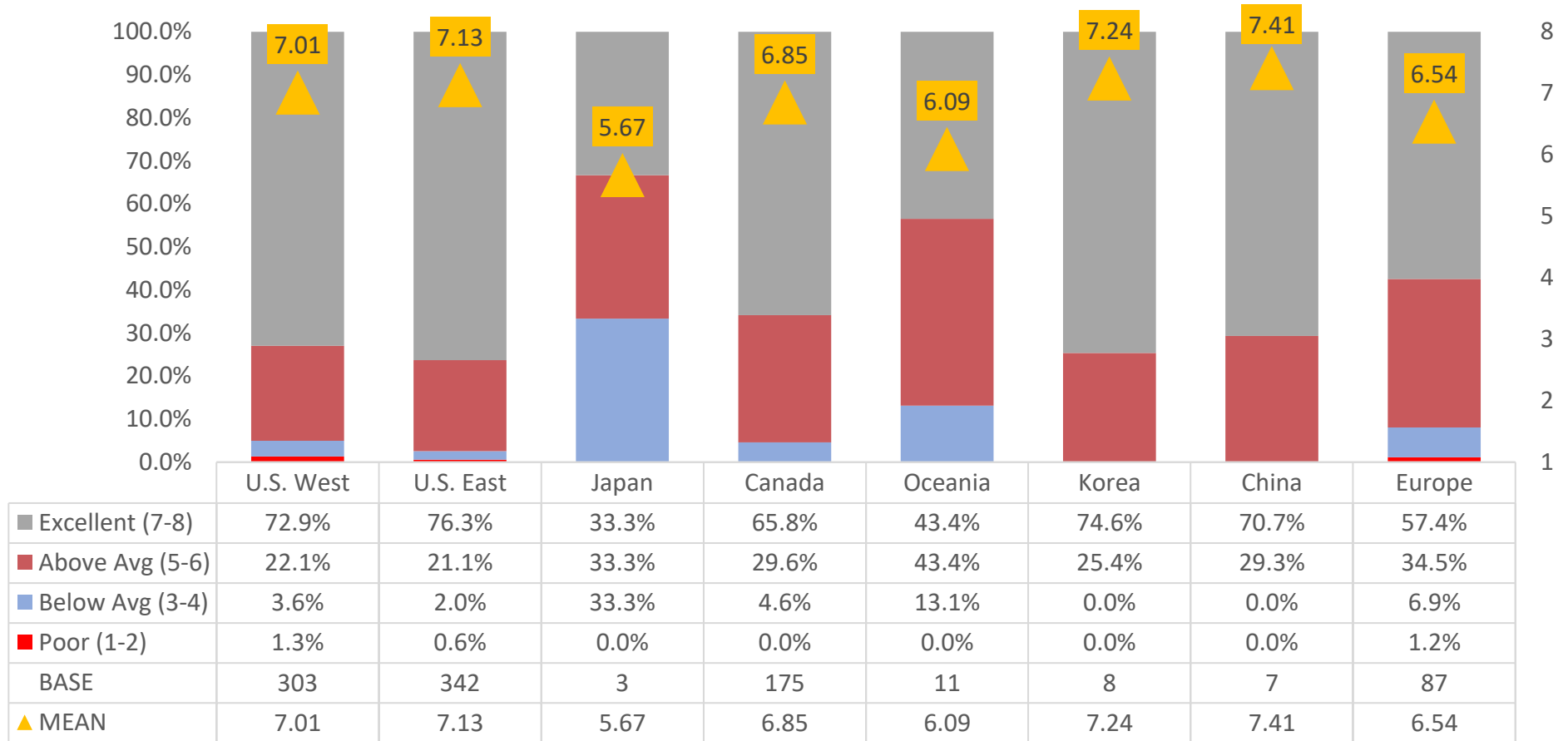
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on \_\_\_?

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

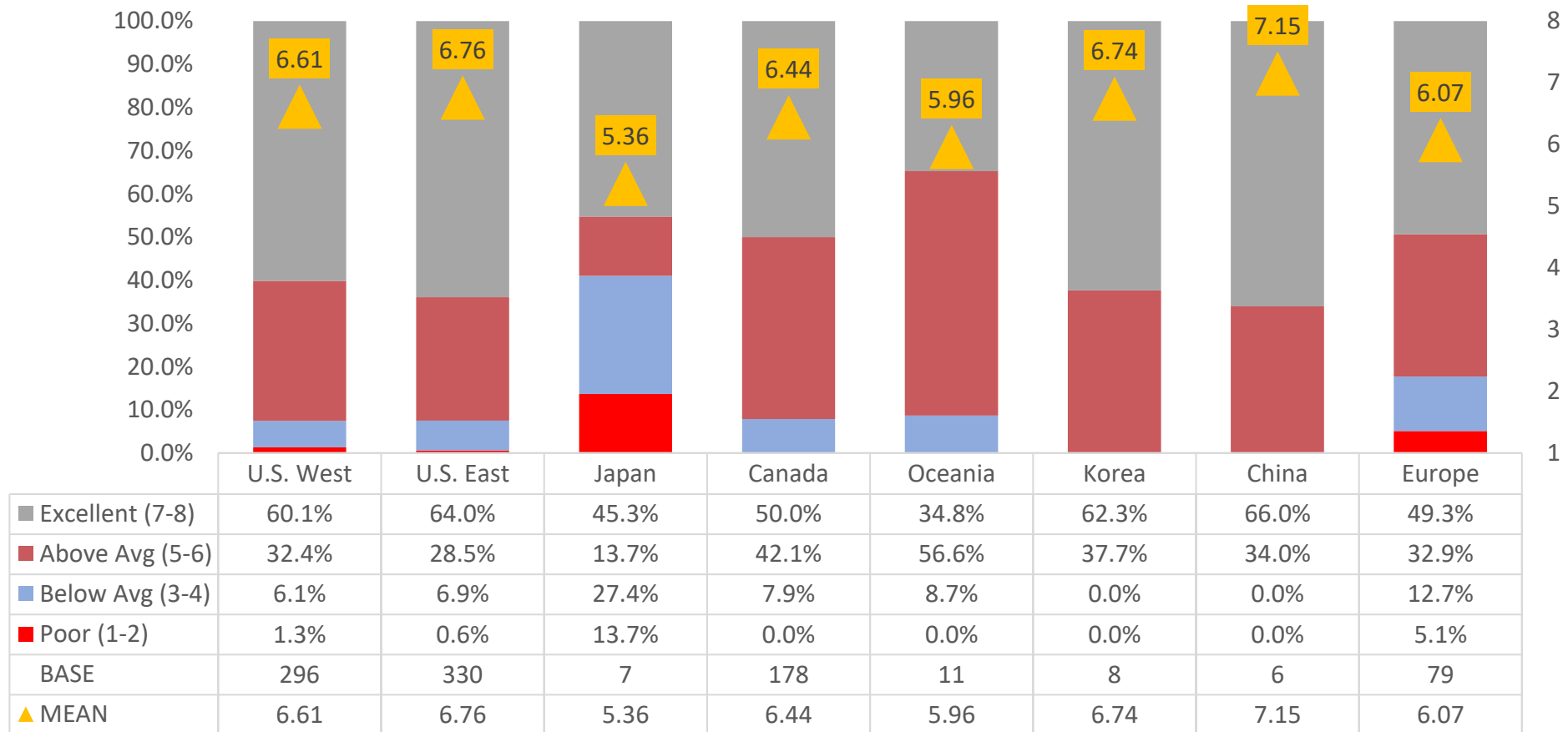
8-pt Rating Scale  
8 = Excellent / 1 = Poor





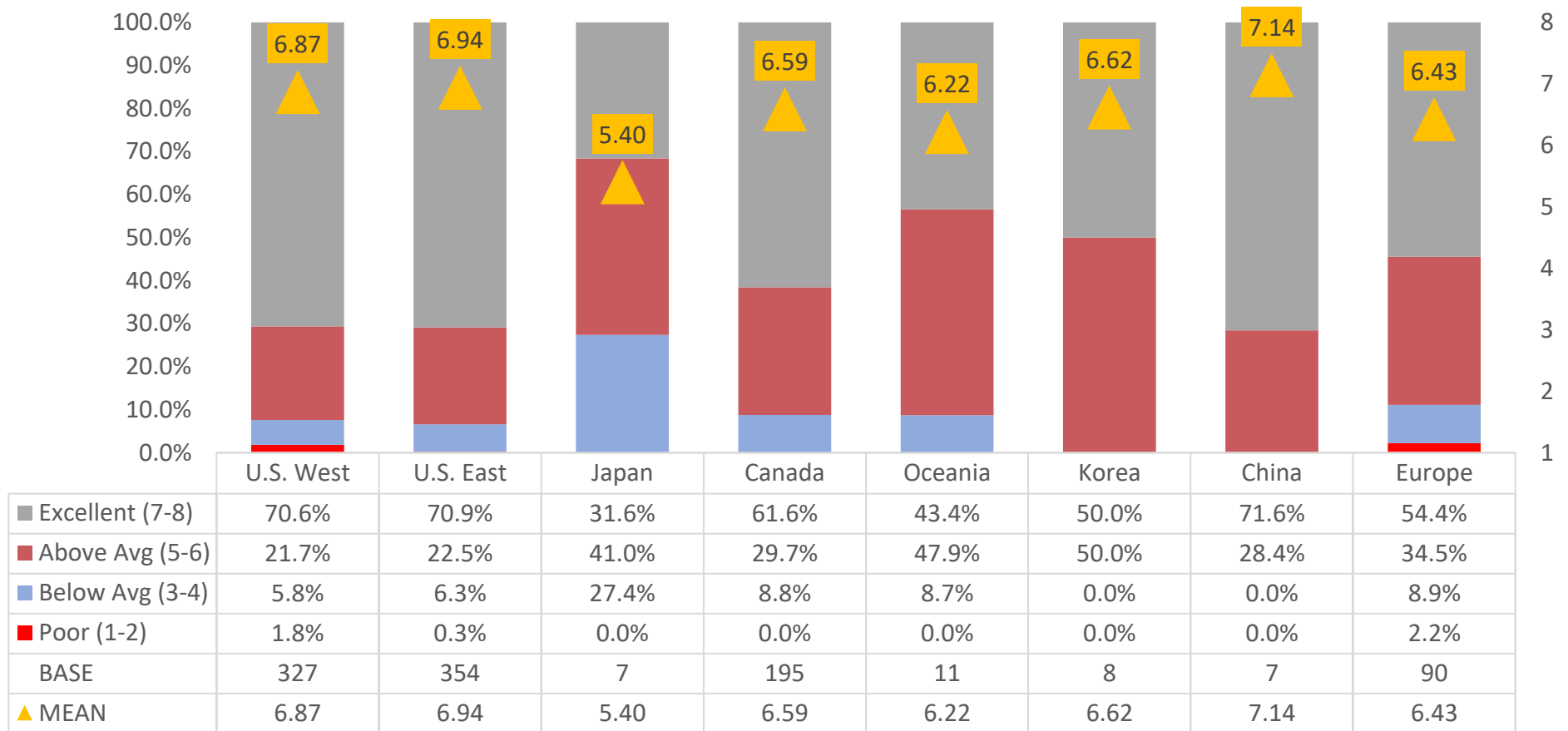
# SHOPPING - MAUI

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



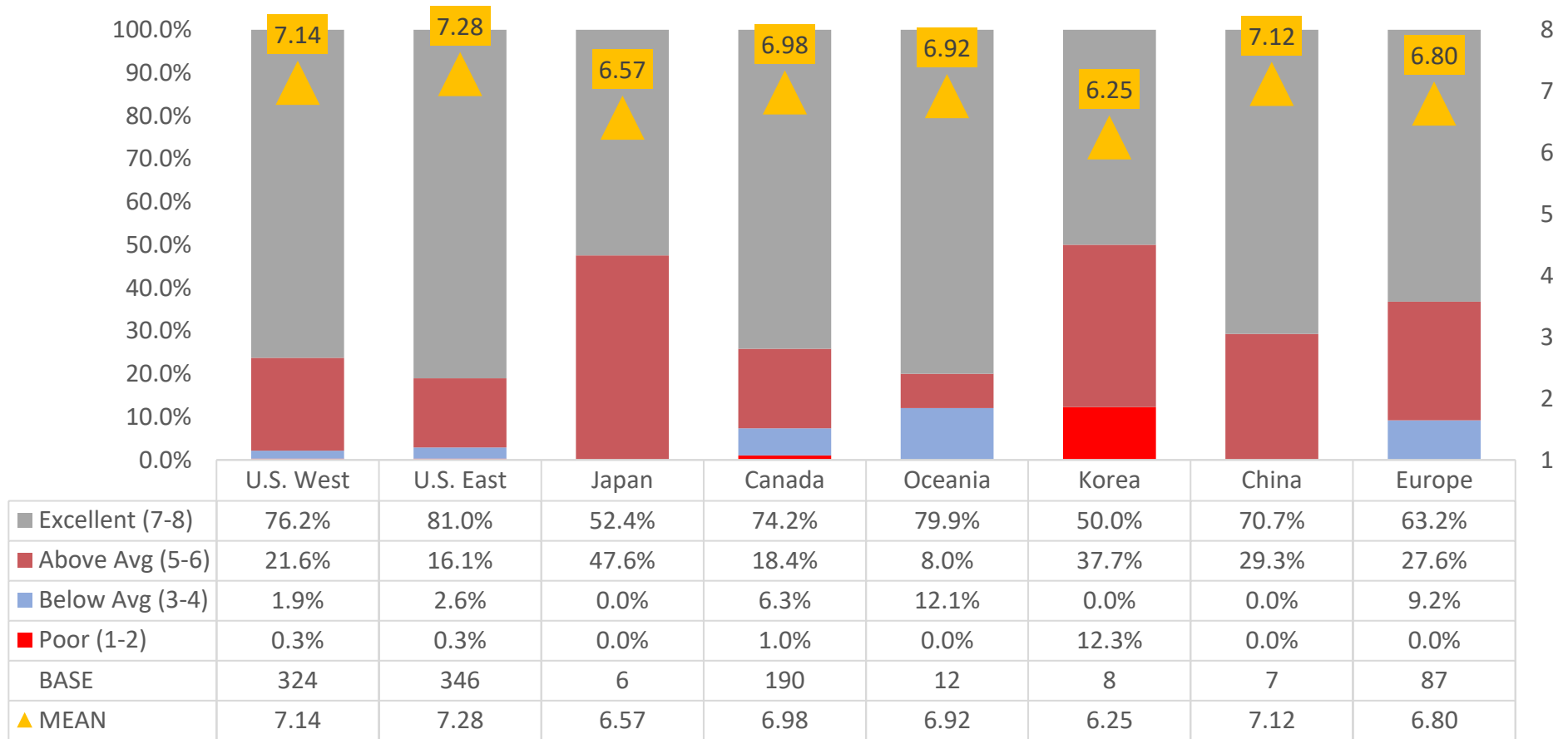
# DINING/ FOOD & BEVERAGE - MAUI

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



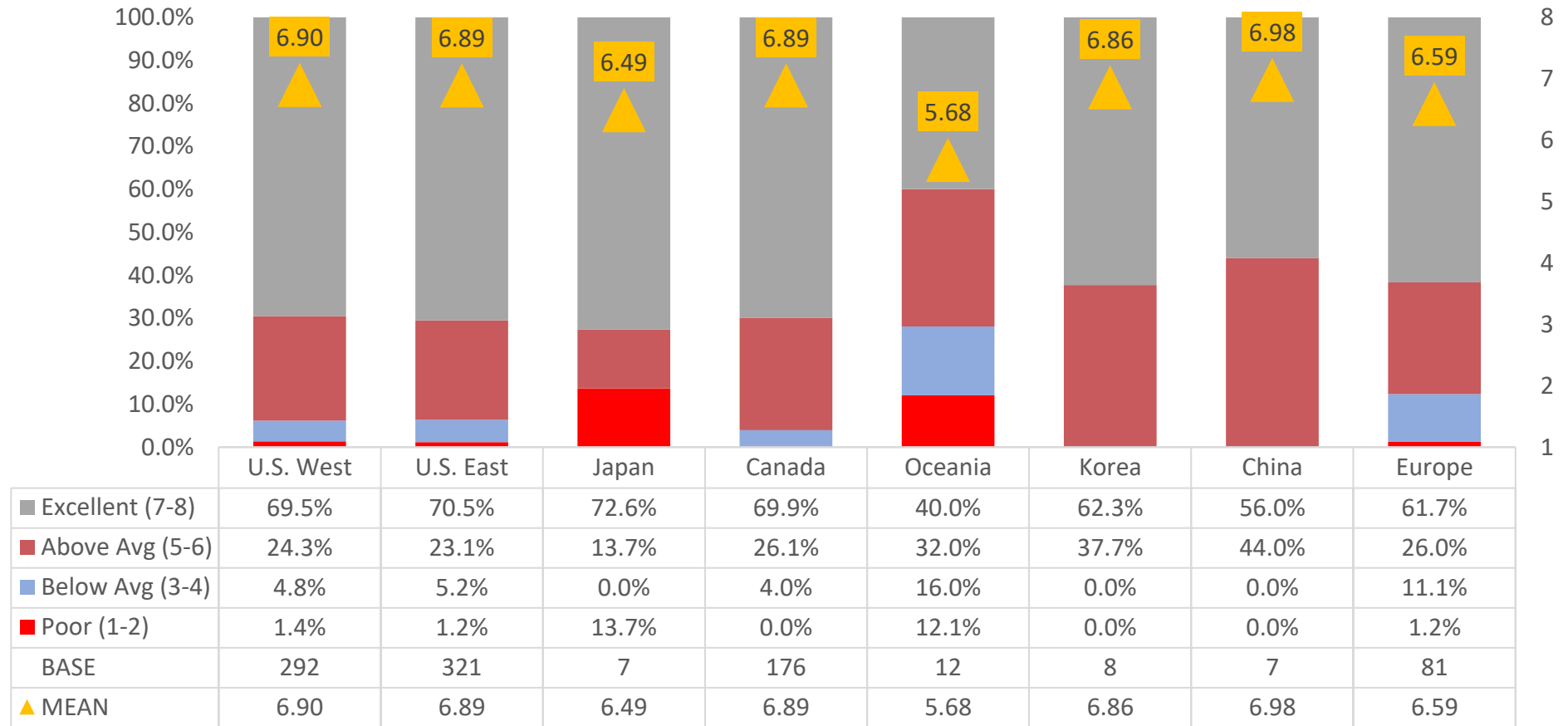
# LODGING/ ACCOMMODATIONS - MAUI

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



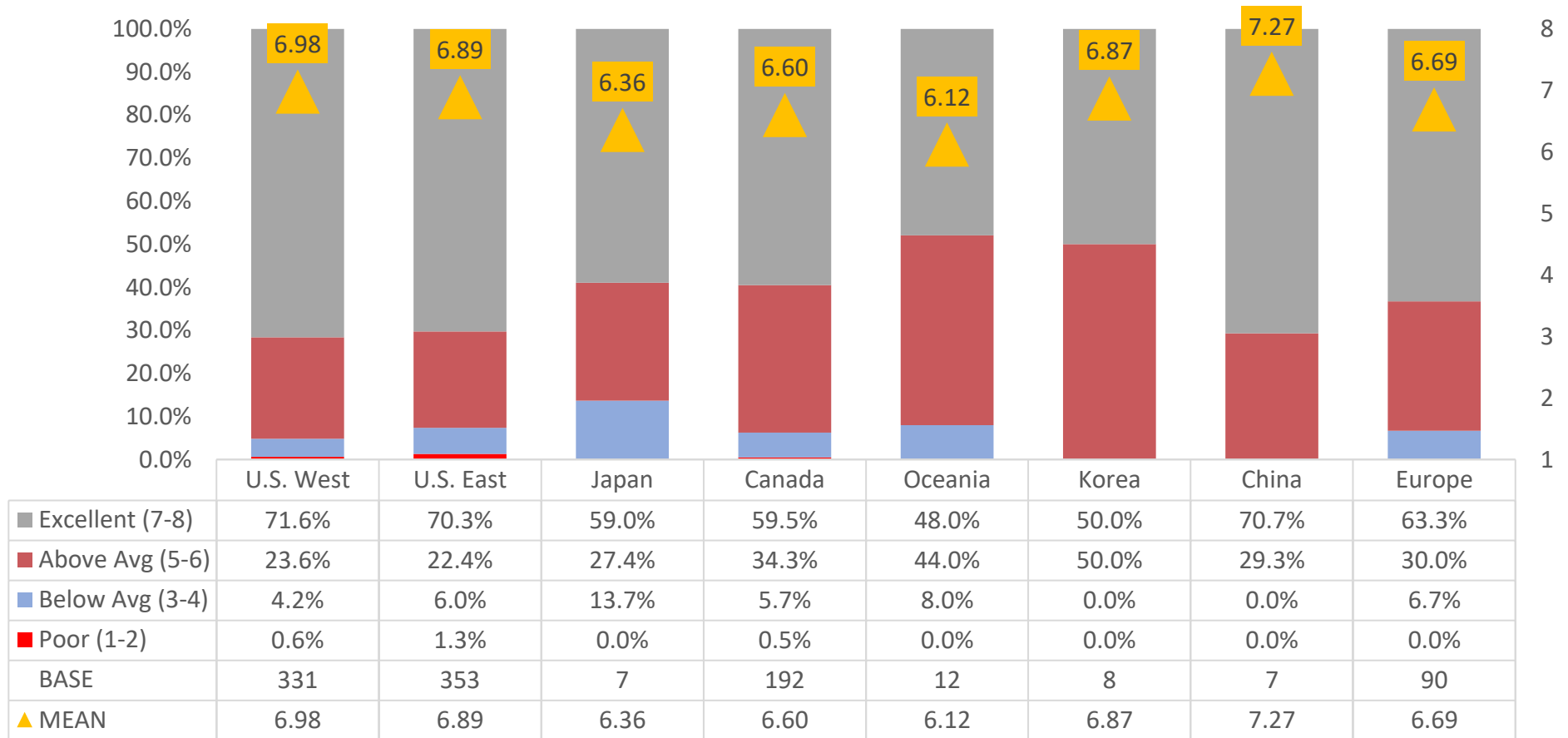
# TRANSPORTATION ON ISLAND - MAUI

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



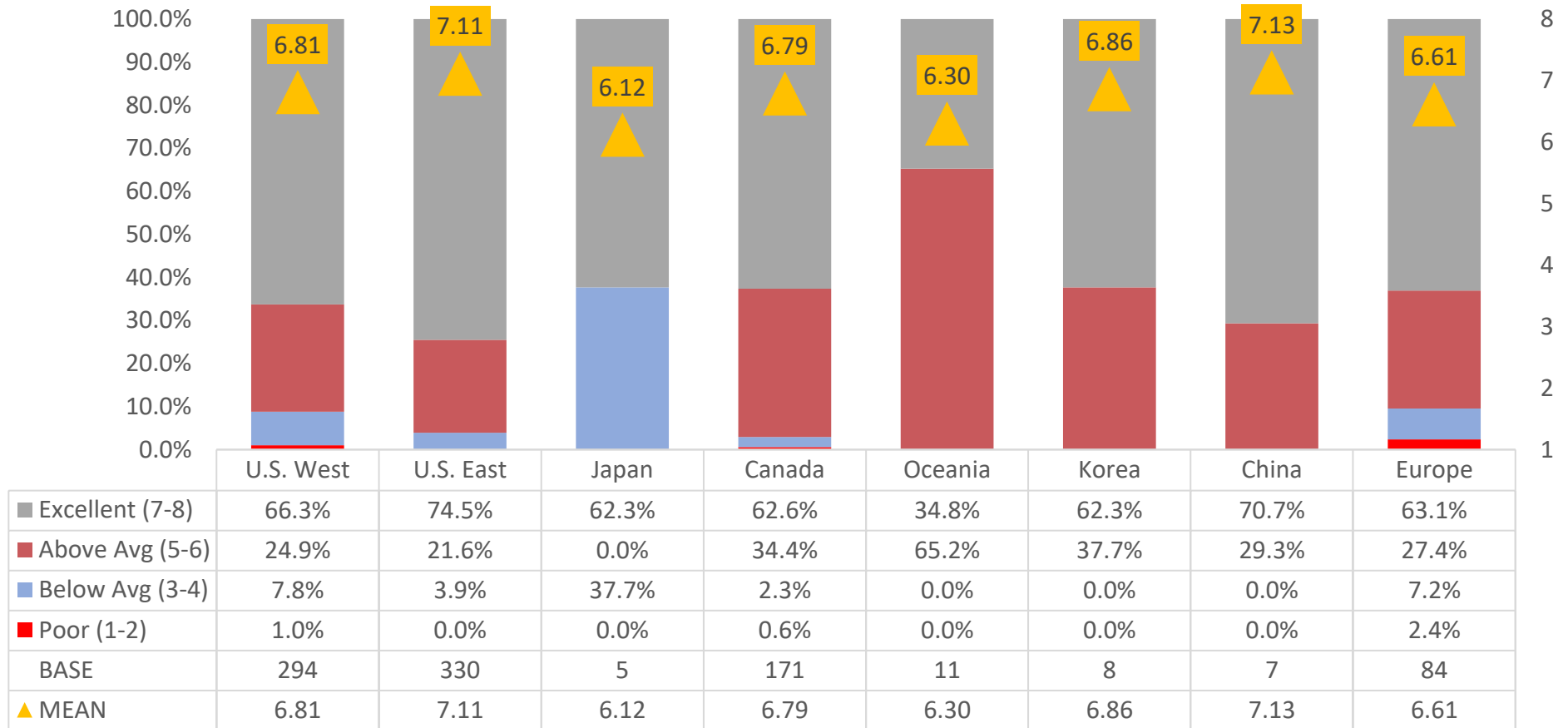
# AIRPORT - MAUI

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



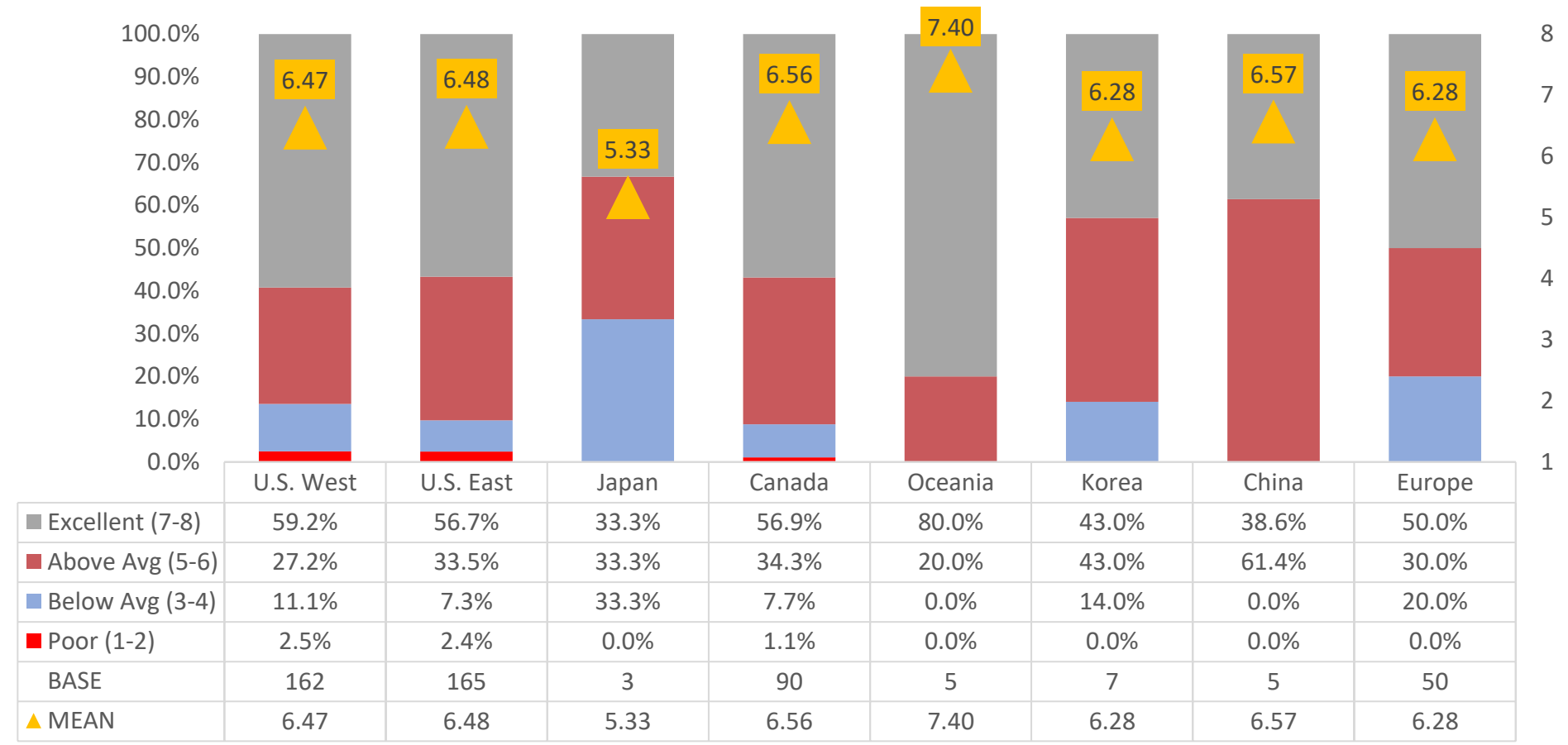
# CULTURAL EXPERIENCES - MAUI

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



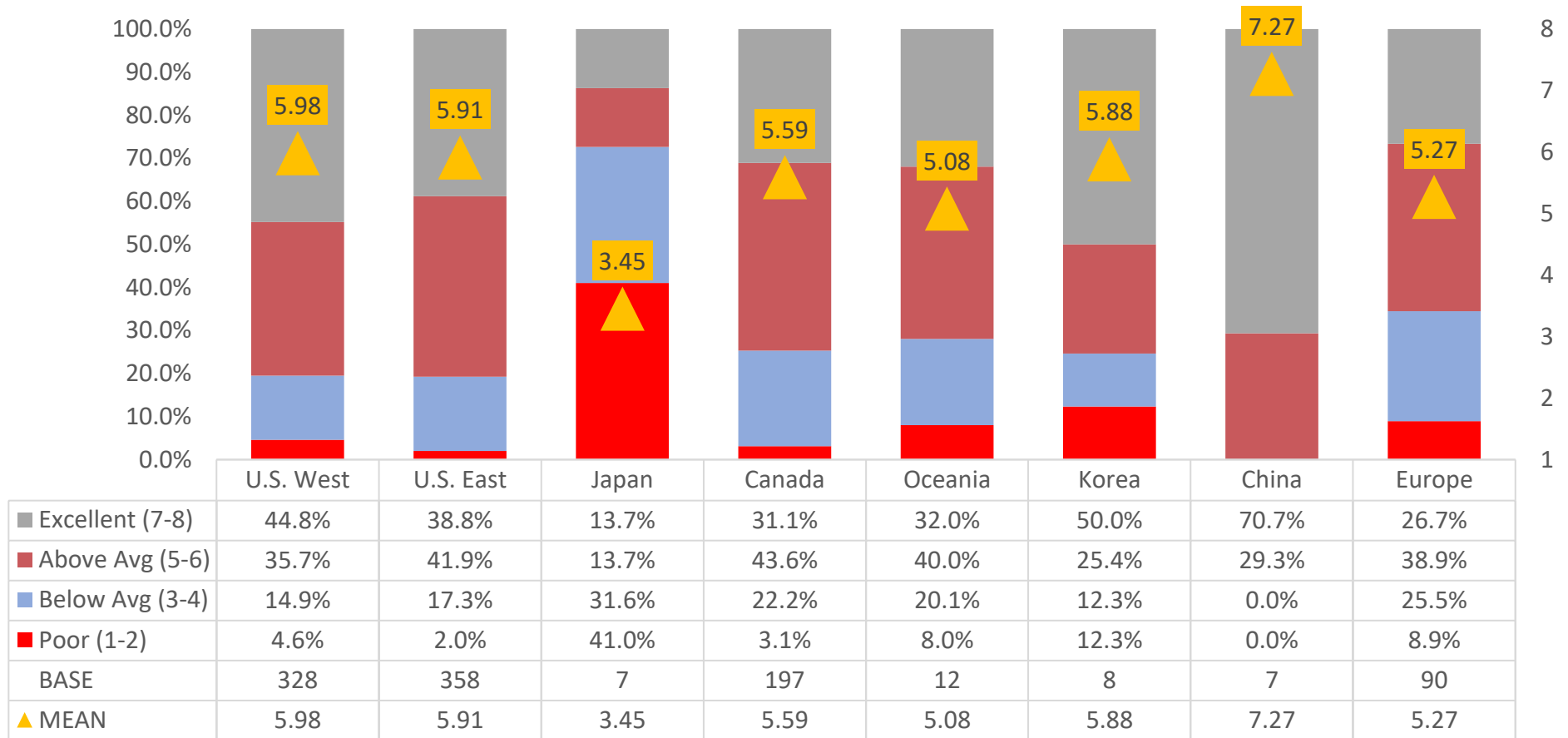
# VOLUNTEER EXPERIENCES - MAUI

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



# VALUE FOR THE MONEY - MAUI

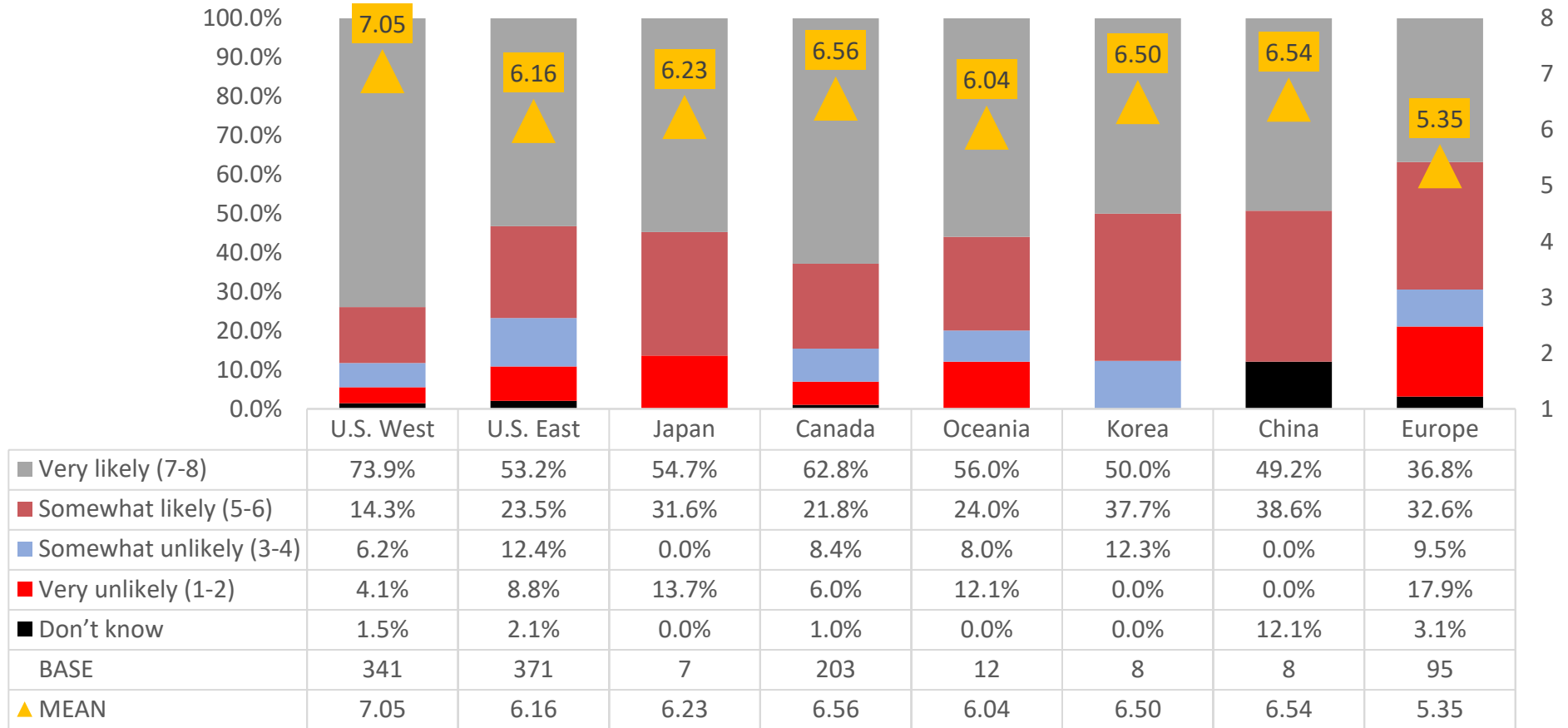
8-pt Rating Scale  
8=Excellent / 1=Poor





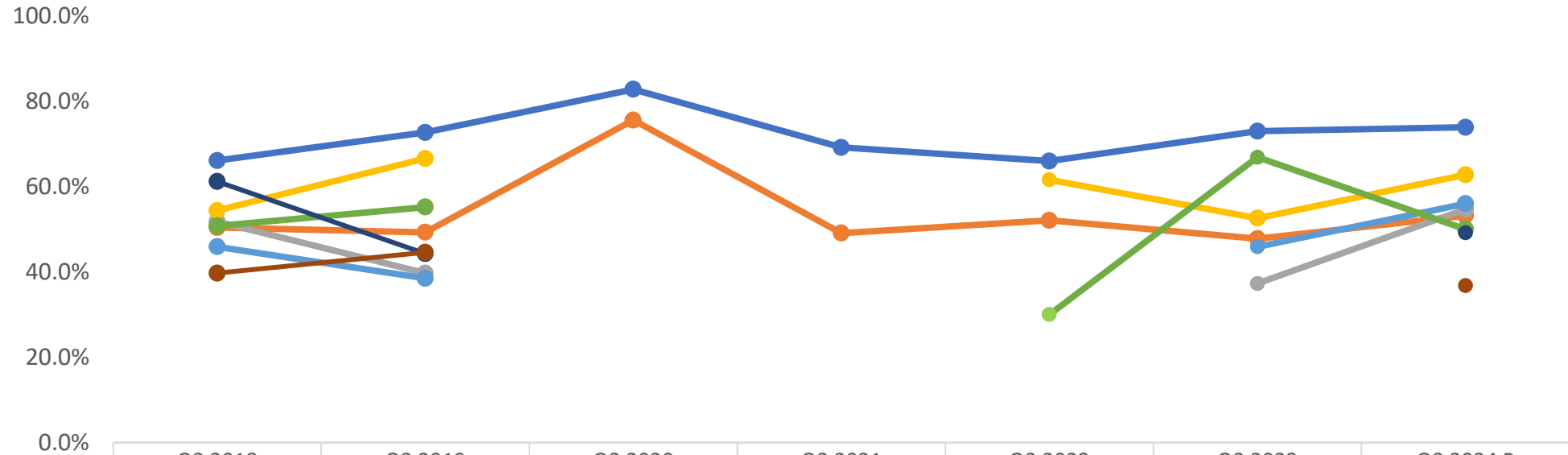
# LIKELIHOOD OF RETURN VISIT - MAUI

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



# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

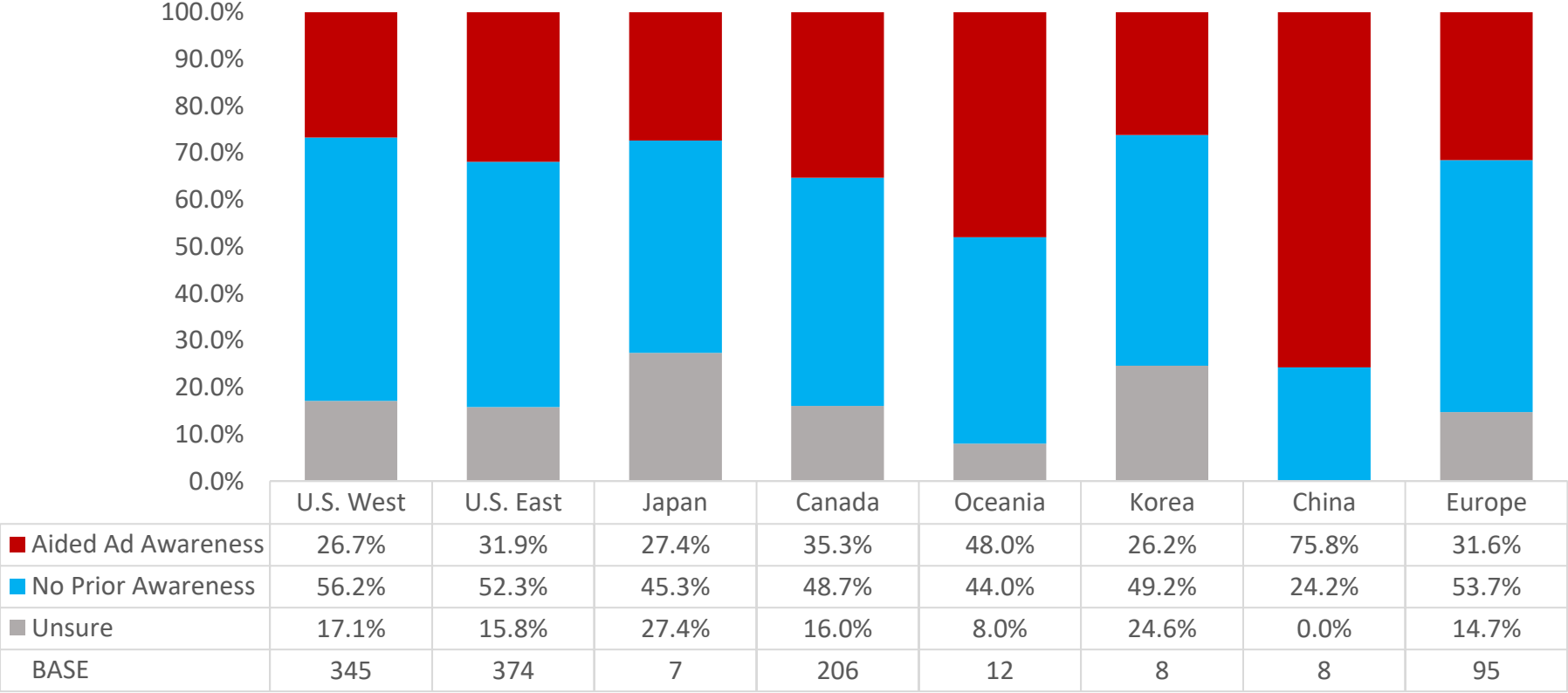


|           | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 66.1%   | 72.7%   | 82.8%   | 69.2%   | 66.0%   | 73.0%   | 73.9%     |
| U.S. East | 50.4%   | 49.3%   | 75.6%   | 49.1%   | 52.1%   | 47.8%   | 53.2%     |
| Japan     | 51.8%   | 39.7%   |         |         |         | 37.3%   | 54.7%     |
| Canada    | 54.4%   | 66.6%   |         |         | 61.6%   | 52.6%   | 62.8%     |
| Oceania   | 45.9%   | 38.5%   |         |         |         | 45.9%   | 56.0%     |
| Korea     | 50.8%   | 55.2%   |         |         | 30.0%   | 66.9%   | 50.0%     |
| China     | 61.2%   | 44.3%   |         |         |         |         | 49.2%     |
| Europe    | 39.7%   | 44.6%   |         |         |         |         | 36.8%     |

P= Preliminary Data

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

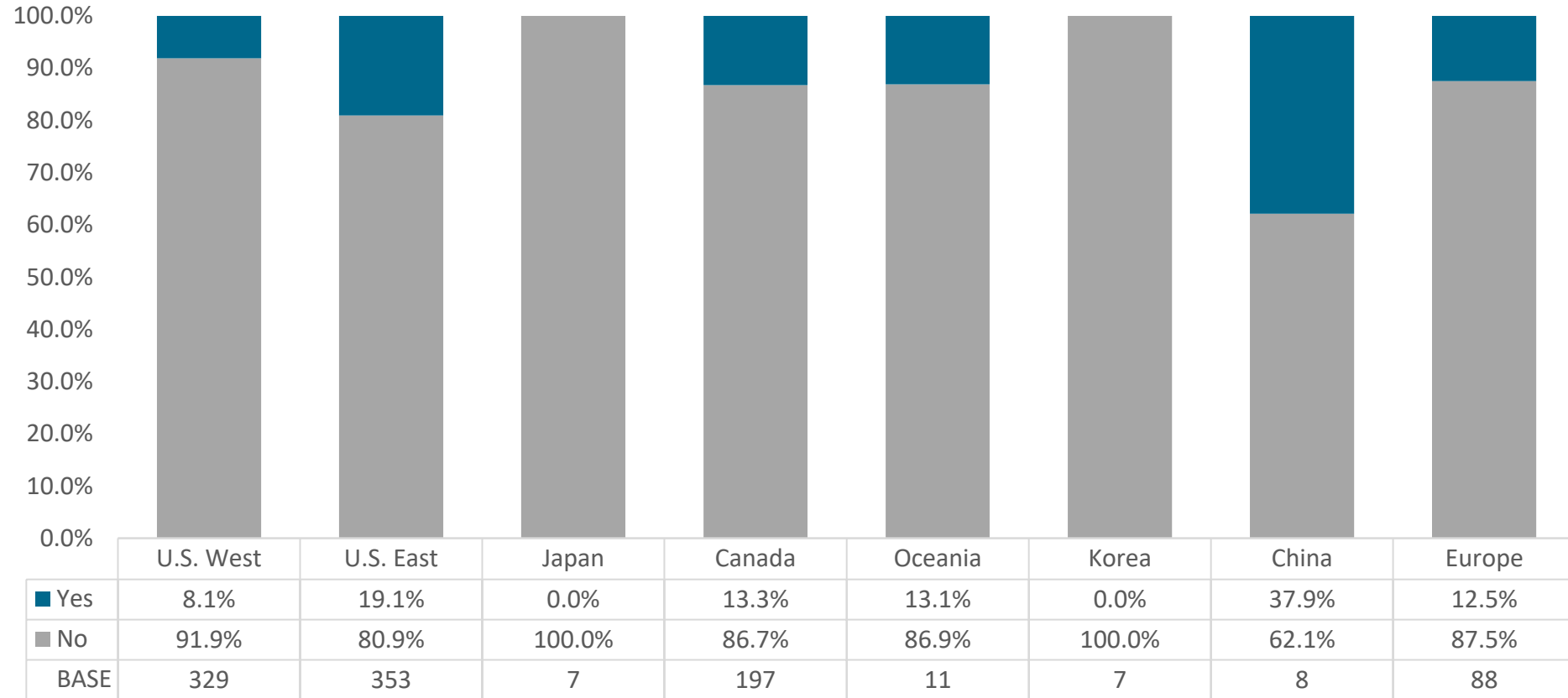
# AIDED ADVERTISING AWARENESS - MAUI



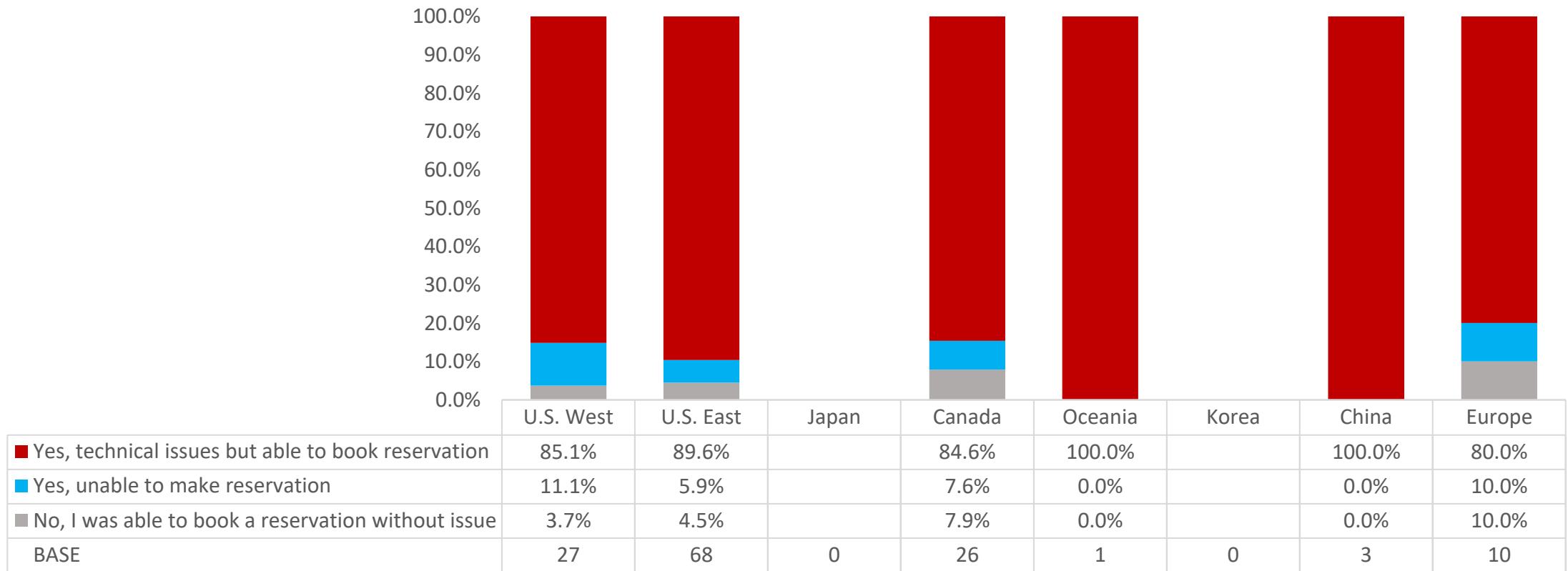
# MOTIVATING FACTORS - MAUI

|  | U.S. West | U.S. East | Japan | Canada | Oceania | China | Korea | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>Famous landmarks or imagery/<br/>natural beauty</b>     | 37.6%     | 45.8%     | 59.0% | 38.4%  | 56.0%   | 75.0% | 62.3% | 46.4%  |
| <b>Hawaiian cultural events</b>                            | 8.7%      | 14.5%     | 0.0%  | 11.2%  | 0.0%    | 0.0%  | 0.0%  | 7.4%   |
| <b>Outdoor or sporting activities and<br/>events</b>       | 15.1%     | 15.8%     | 0.0%  | 13.5%  | 44.0%   | 25.8% | 24.6% | 18.9%  |
| <b>Social media posts and videos</b>                       | 10.1%     | 14.4%     | 27.4% | 17.0%  | 12.1%   | 12.9% | 36.9% | 17.9%  |
| <b>Hawaiian music</b>                                      | 7.3%      | 4.7%      | 0.0%  | 9.7%   | 8.0%    | 0.0%  | 0.0%  | 2.1%   |
| <b>Television programs or movies<br/>filmed in Hawai'i</b> | 4.6%      | 4.2%      | 13.7% | 10.2%  | 8.0%    | 0.0%  | 0.0%  | 11.6%  |
| <b>BASE</b>  | 345       | 374       | 7     | 206    | 12      | 8     | 8     | 95     |

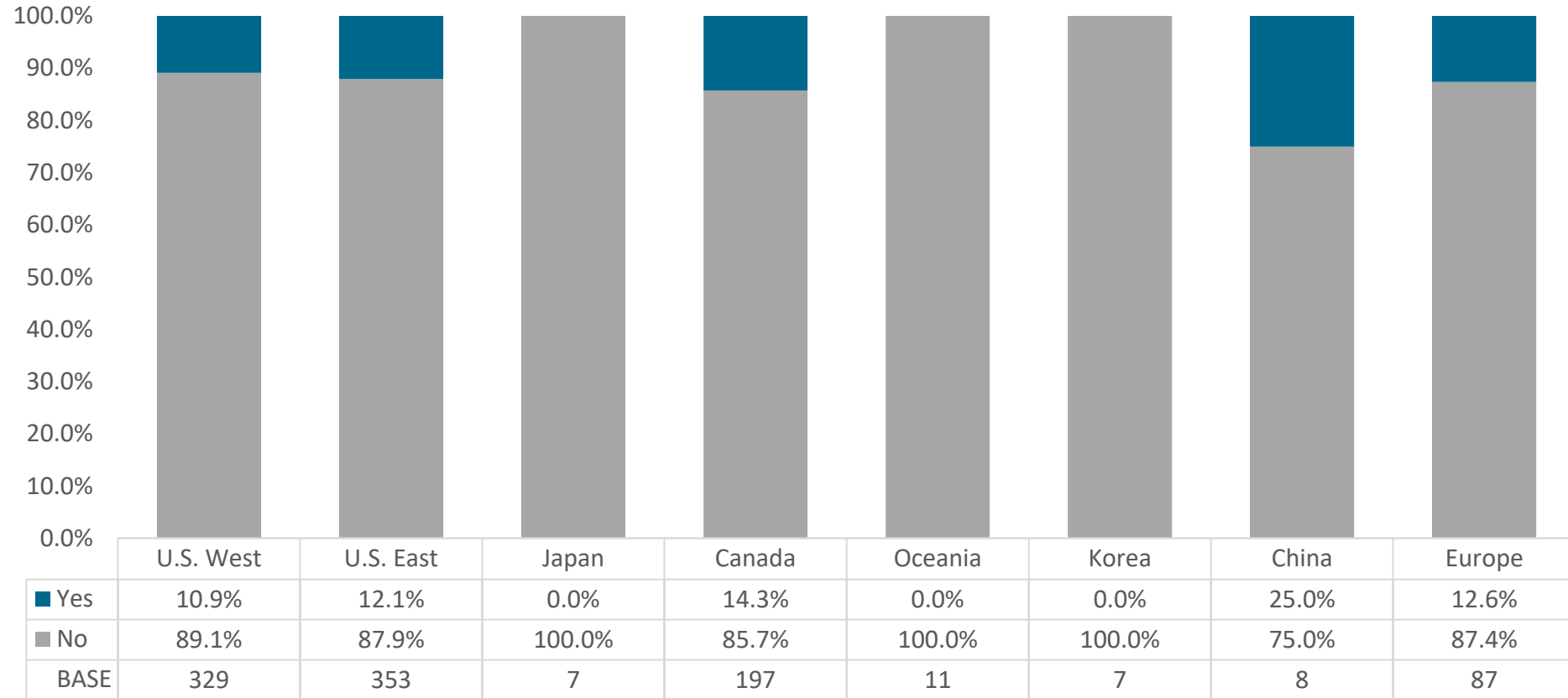
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



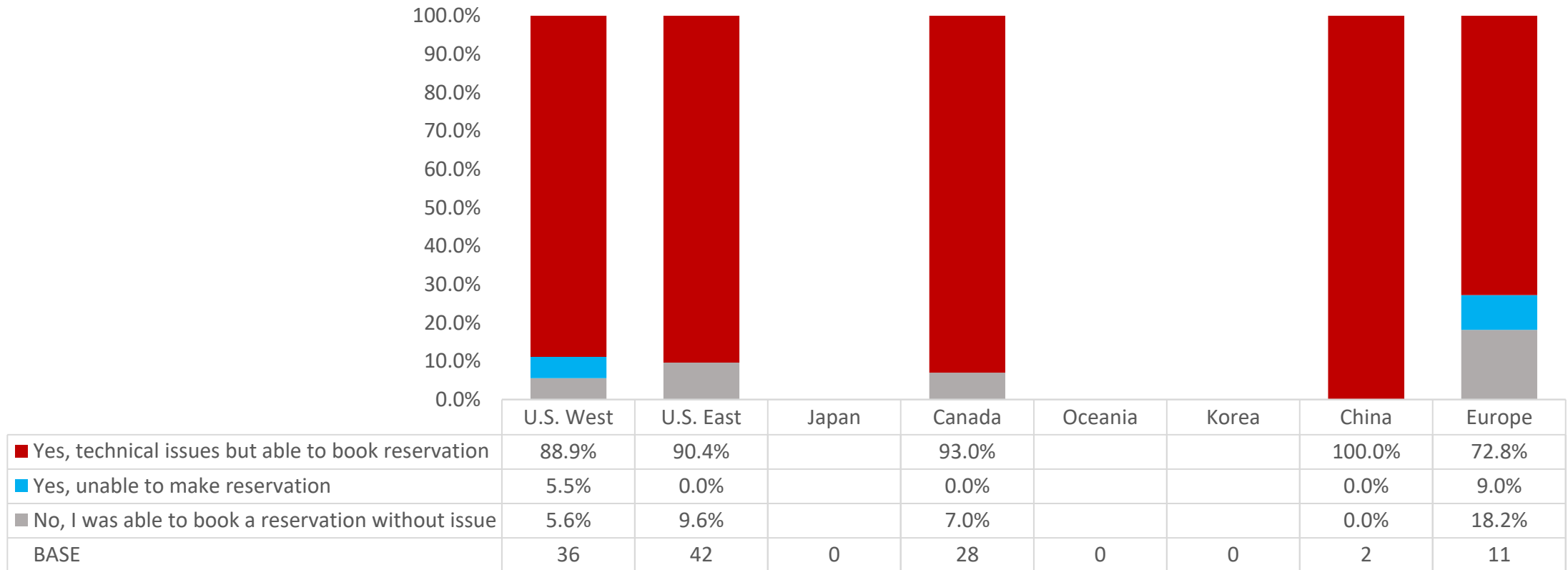
# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



# 'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE

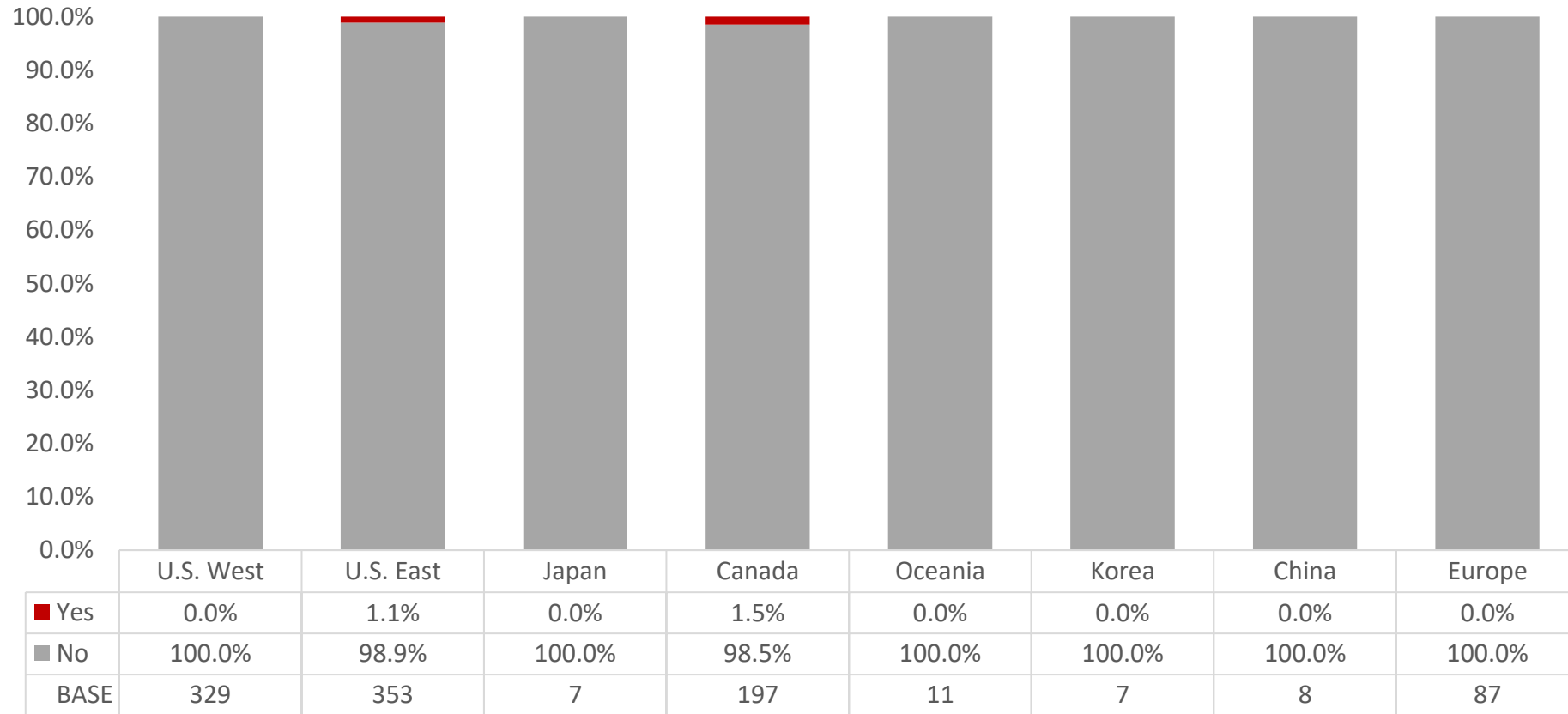


# 'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS





# VISITED MAUI FOR SPECIFIC EVENT



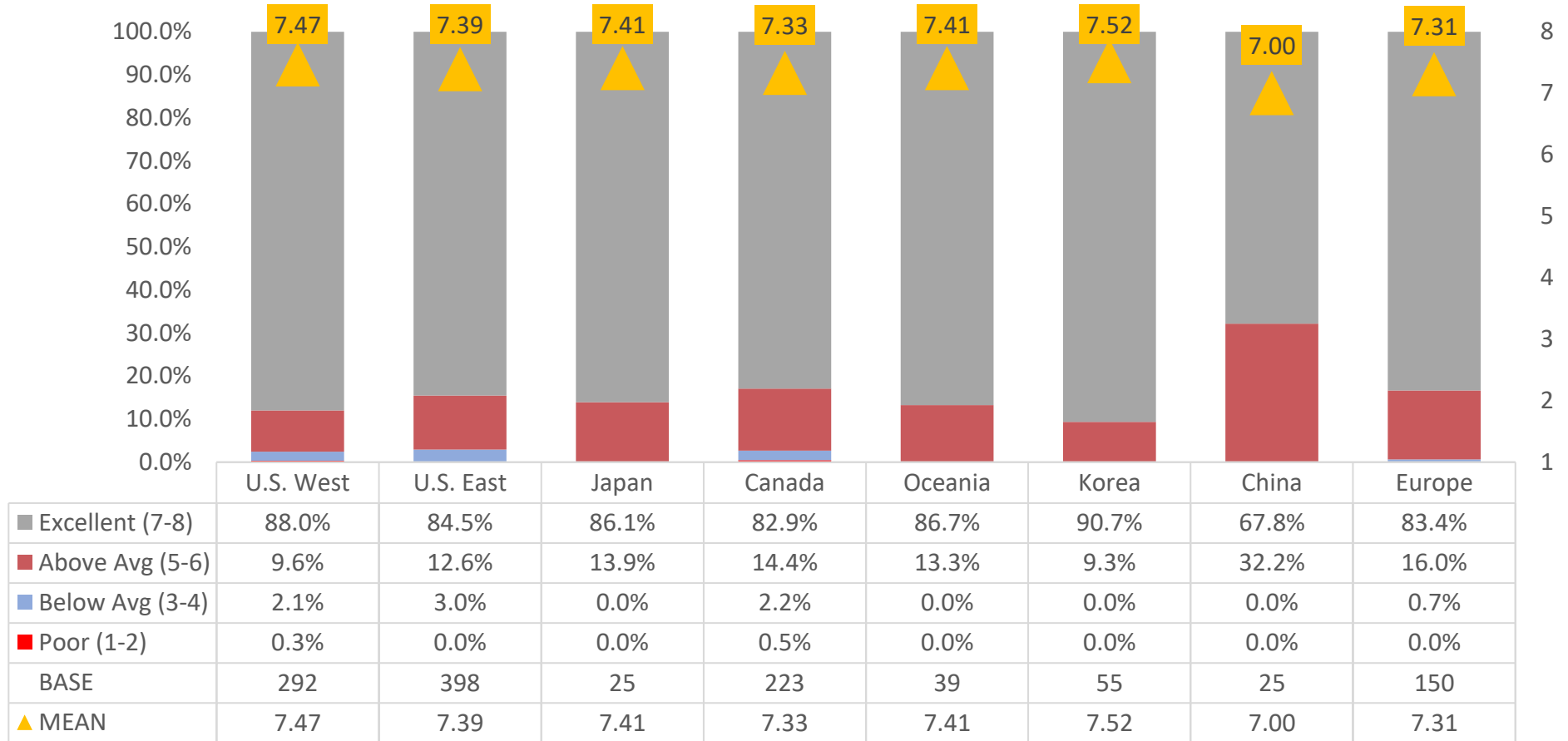
# VISITED MAUI FOR SPECIFIC EVENT

|                        | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|------------------------|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Maui Marathon          | 0.0%      | 100%      | 0.0%  | 0.0%   | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Other Festival/concert | 0.0%      | 0.0%      | 0.0%  | 66.7%  | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Other sporting event   | 0.0%      | 0.0%      | 0.0%  | 33.3%  | 0.0%    | 0.0%  | 0.0%  | 0.0%   |
| Total                  | 0         | 4         | 0     | 3      | 0       | 0     | 0     | 0      |

# Section 8 – Island of Hawai‘i

# SATISFACTION - ISLAND OF HAWAI‘I

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



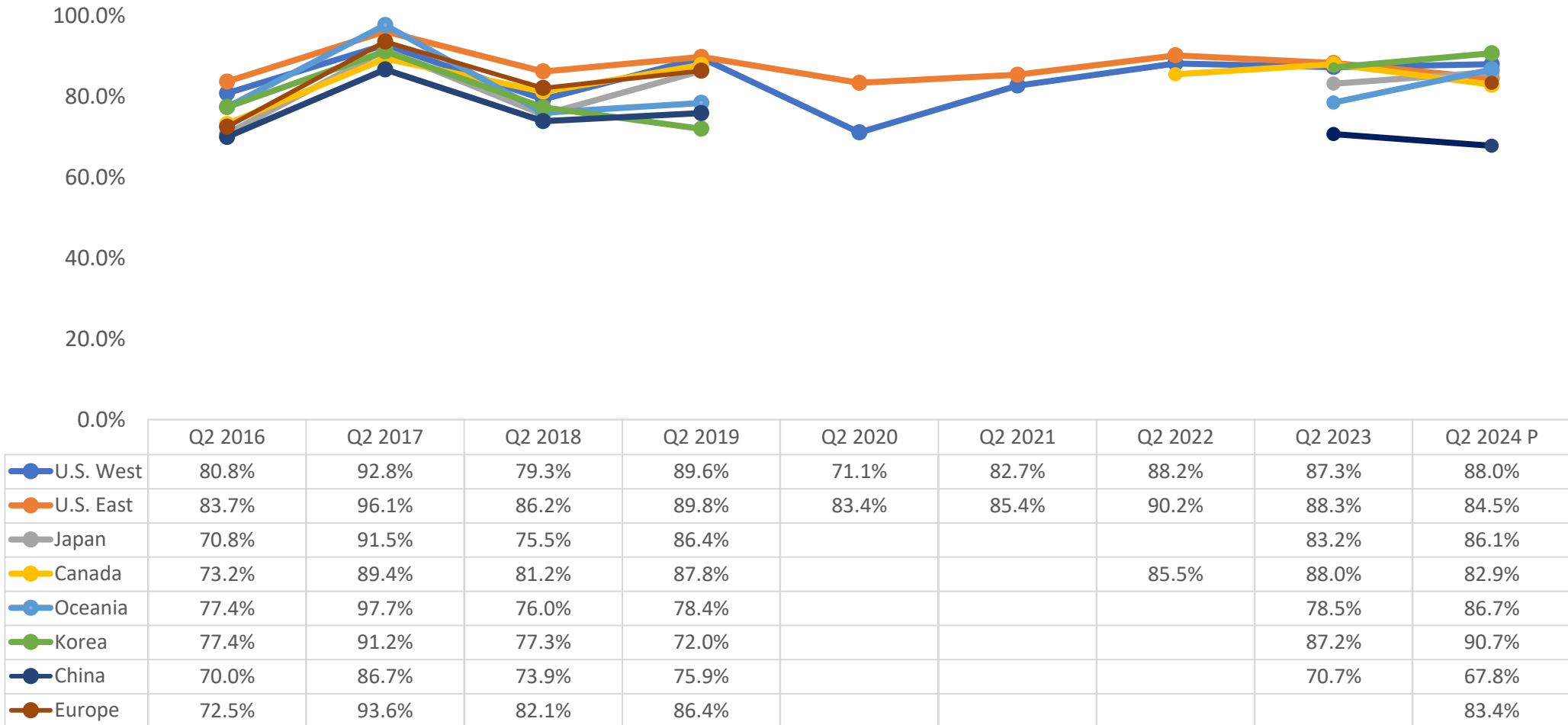
# SATISFACTION - ISLAND OF HAWAII

- **Gender:** Female respondents from **U.S. East** gave higher satisfaction scores than male respondents.
- **Age:** Visitors from **U.S. West** between the ages of 18-34 were the most satisfied with their stay compared to visitors from other age groups.

# 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

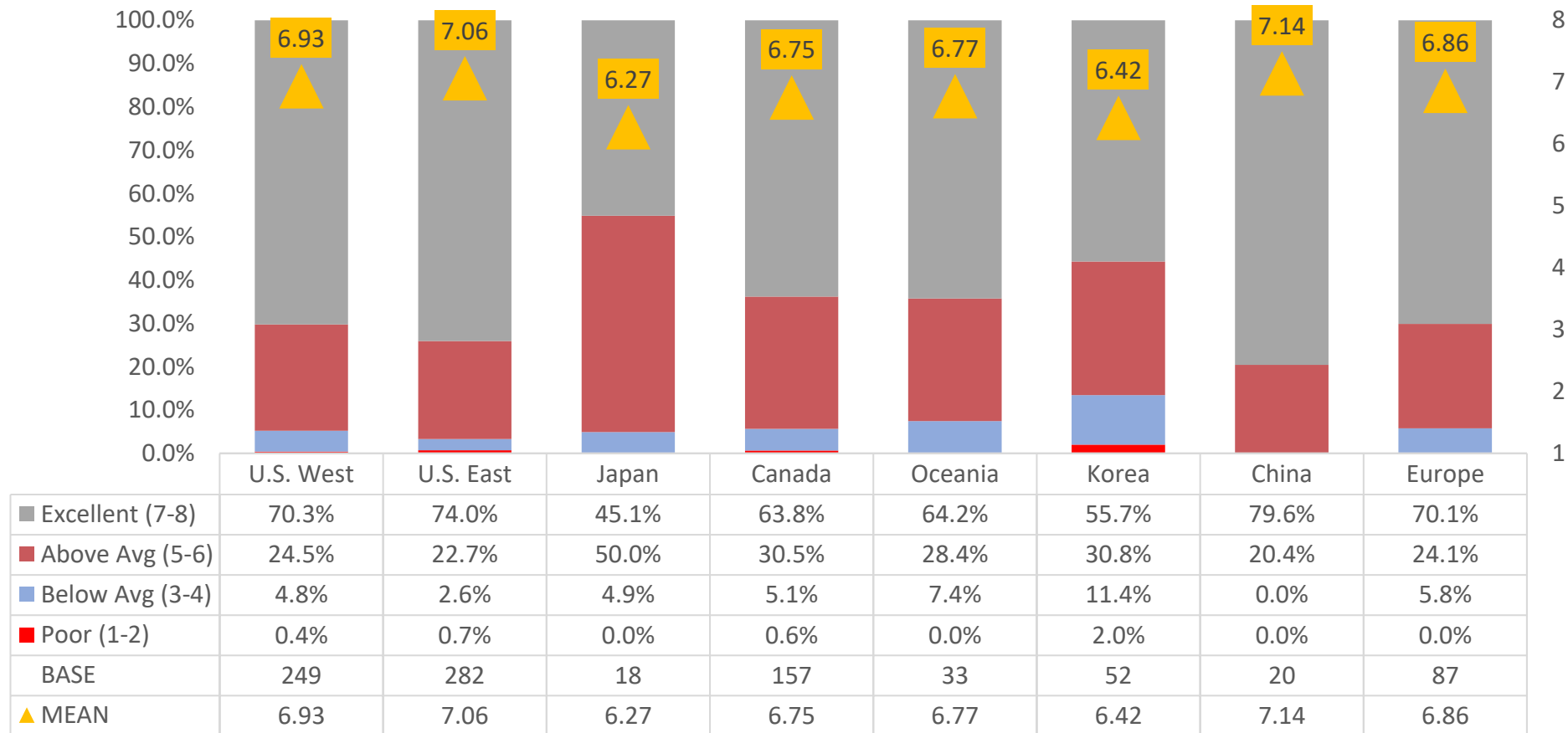
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

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.



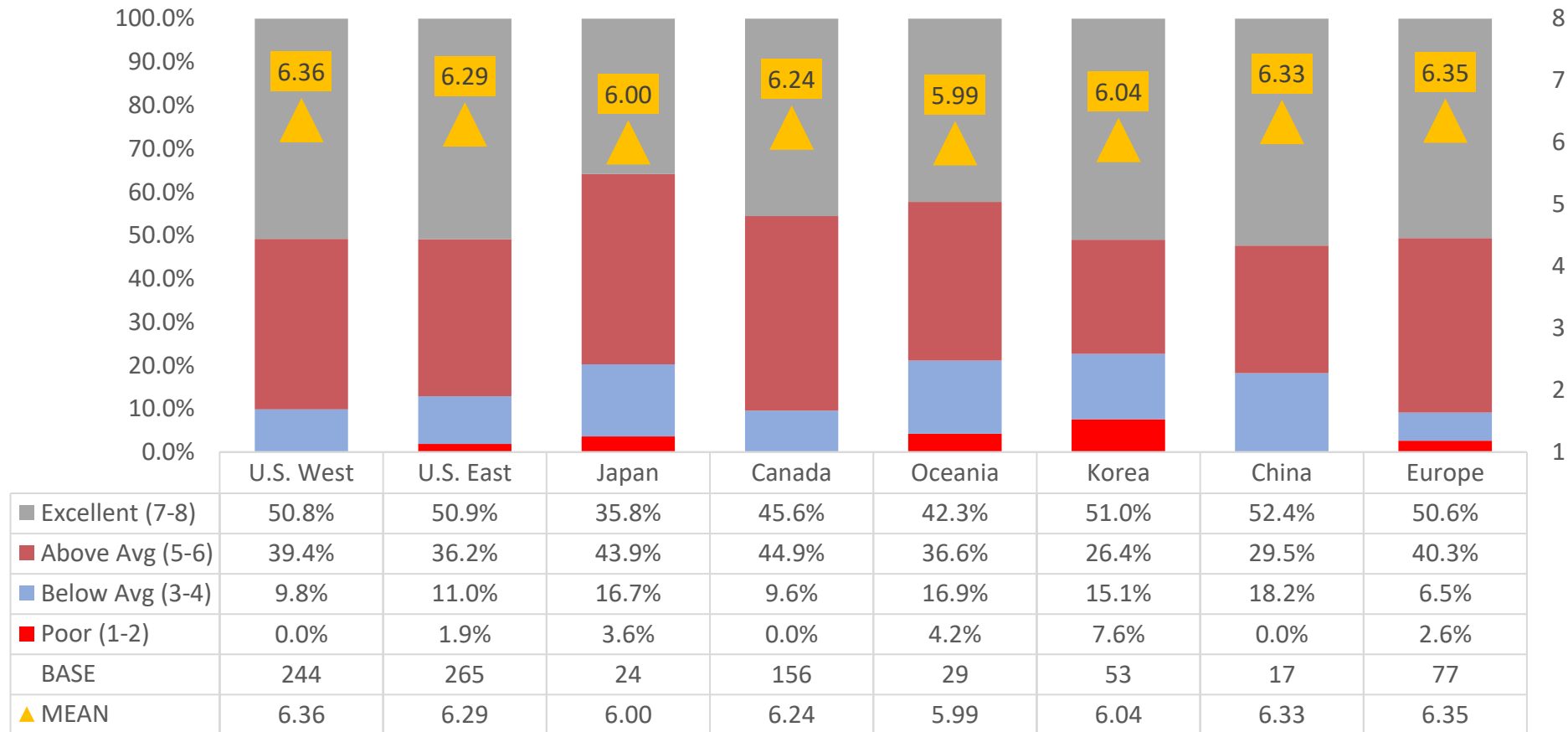
# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



# SHOPPING - ISLAND OF HAWAI‘I

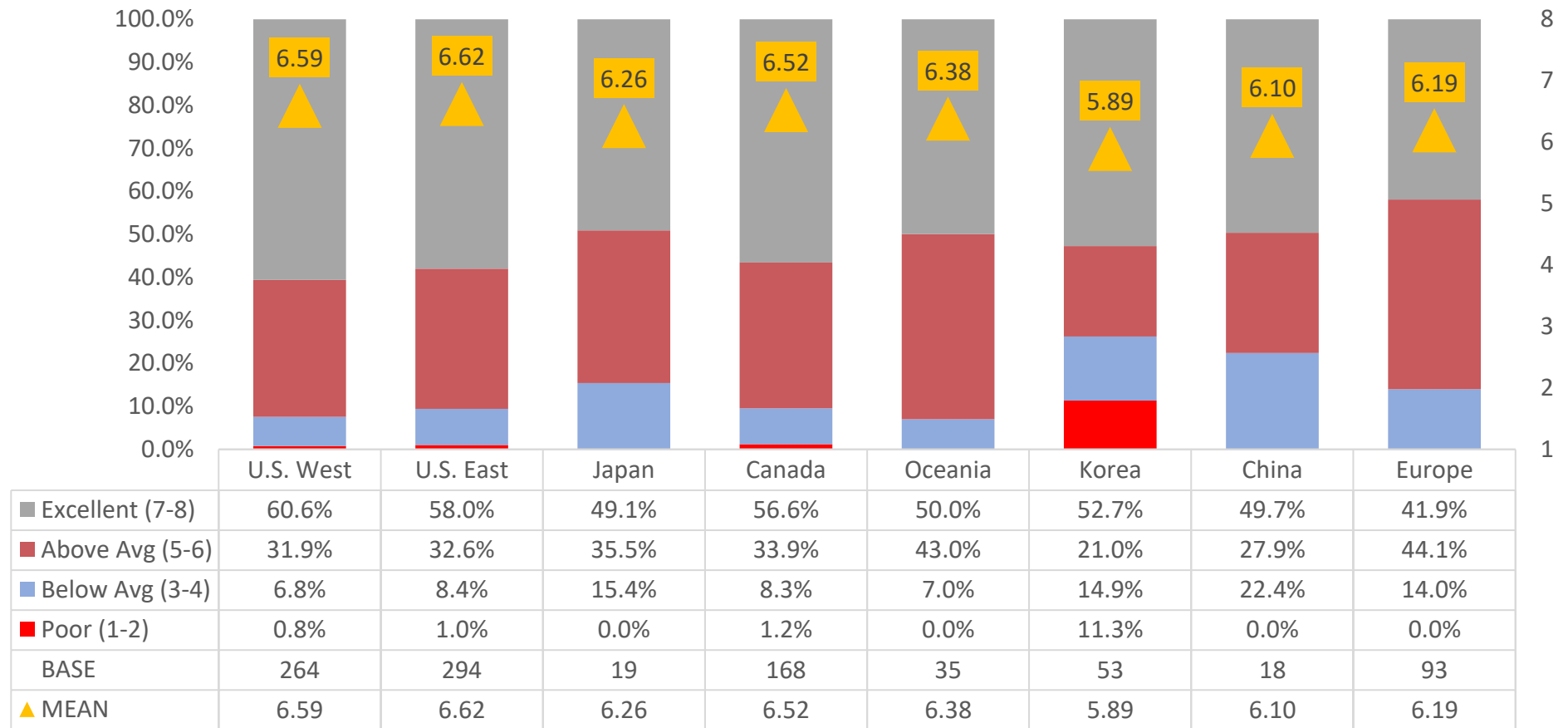
8-pt Rating Scale  
8 = Excellent / 1 = Poor





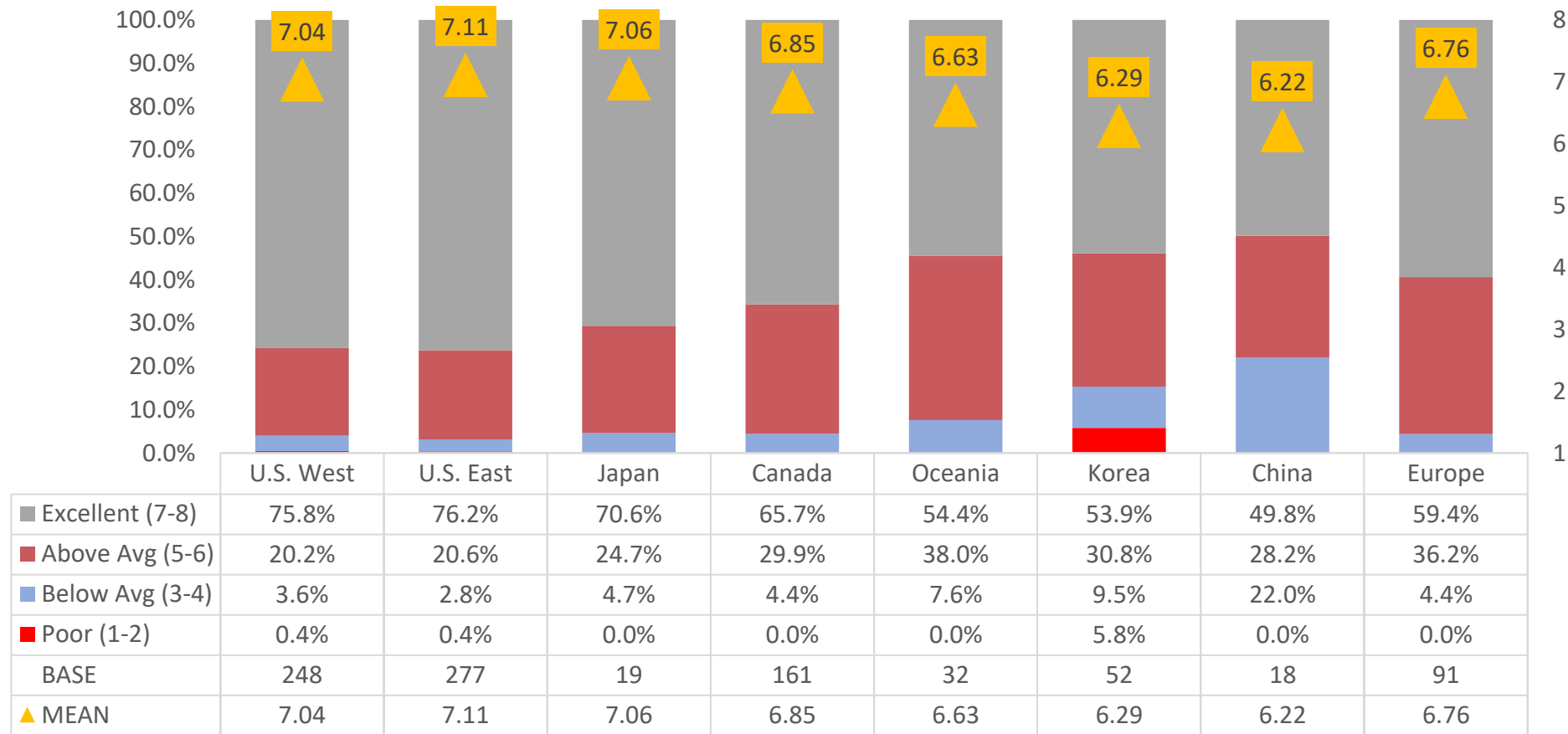
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



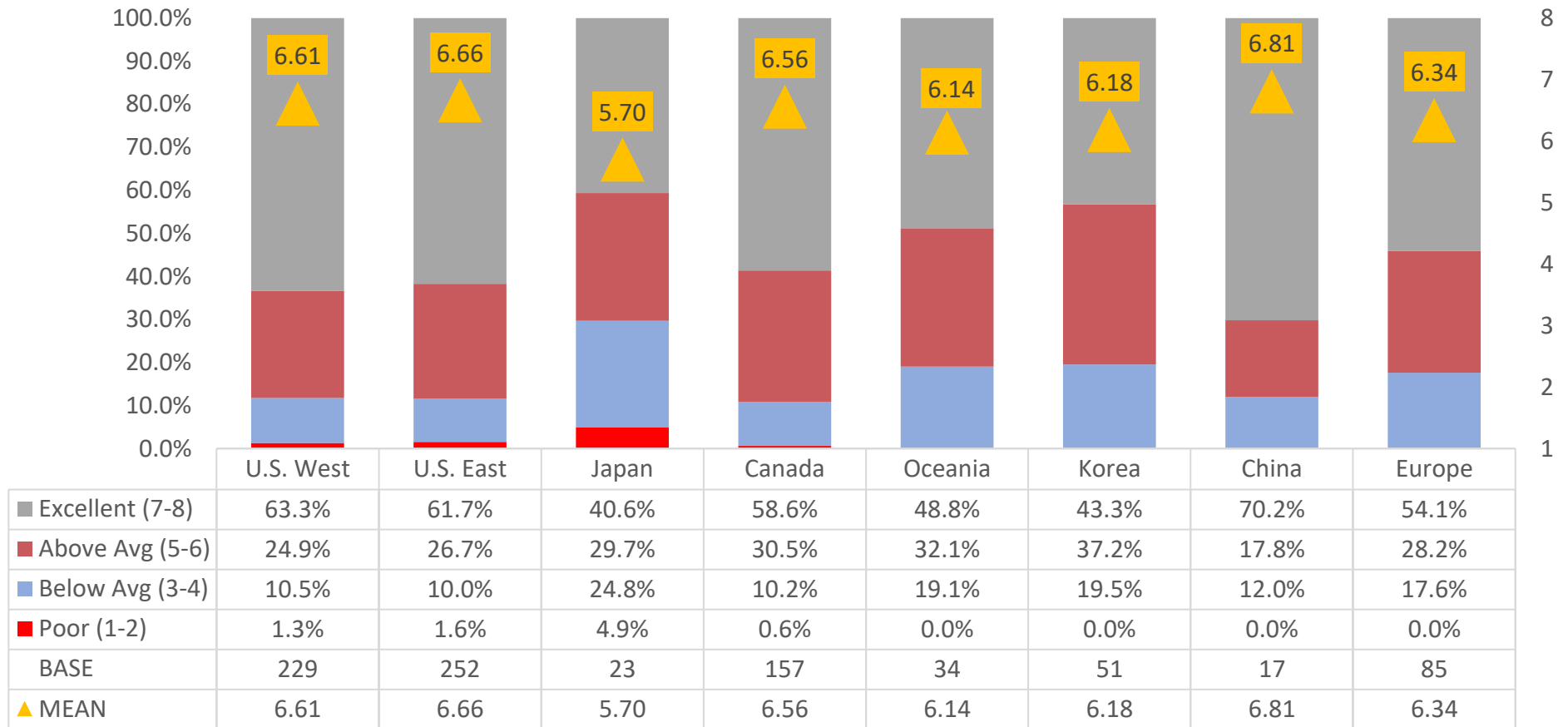
# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



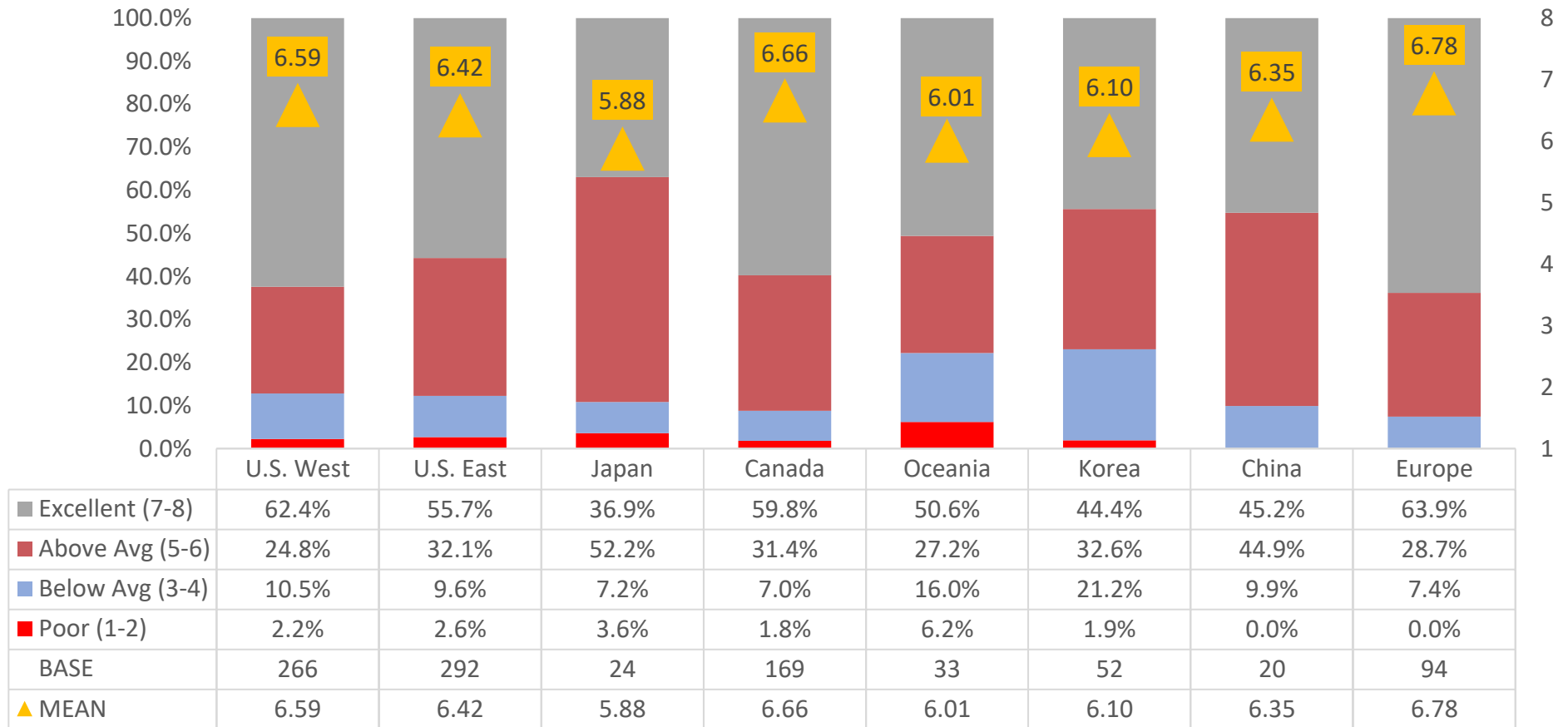
# TRANSPORTATION ON ISLAND - ISLAND OF HAWAI‘I

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



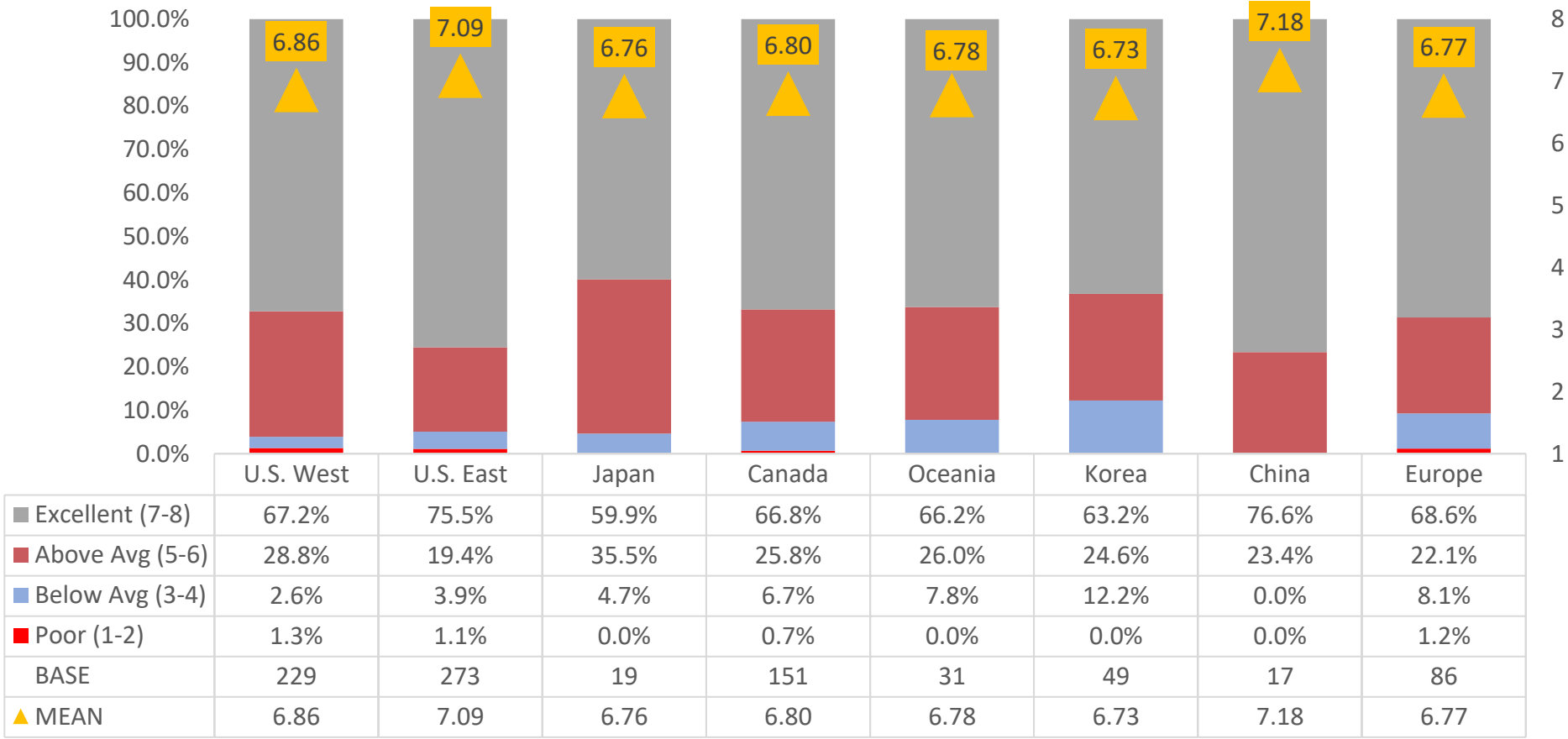
# AIRPORT- ISLAND OF HAWAI'I

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



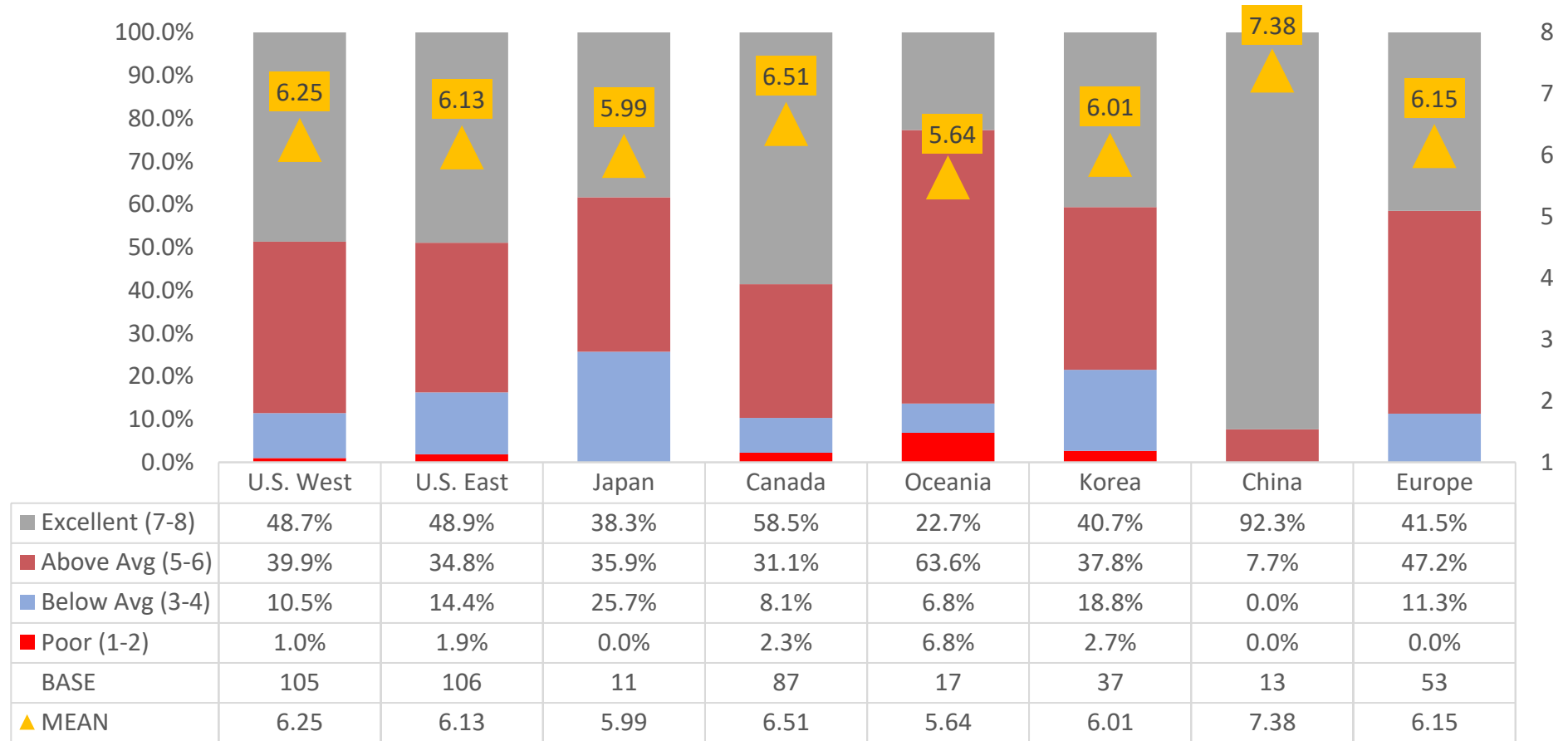
# CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI‘I

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



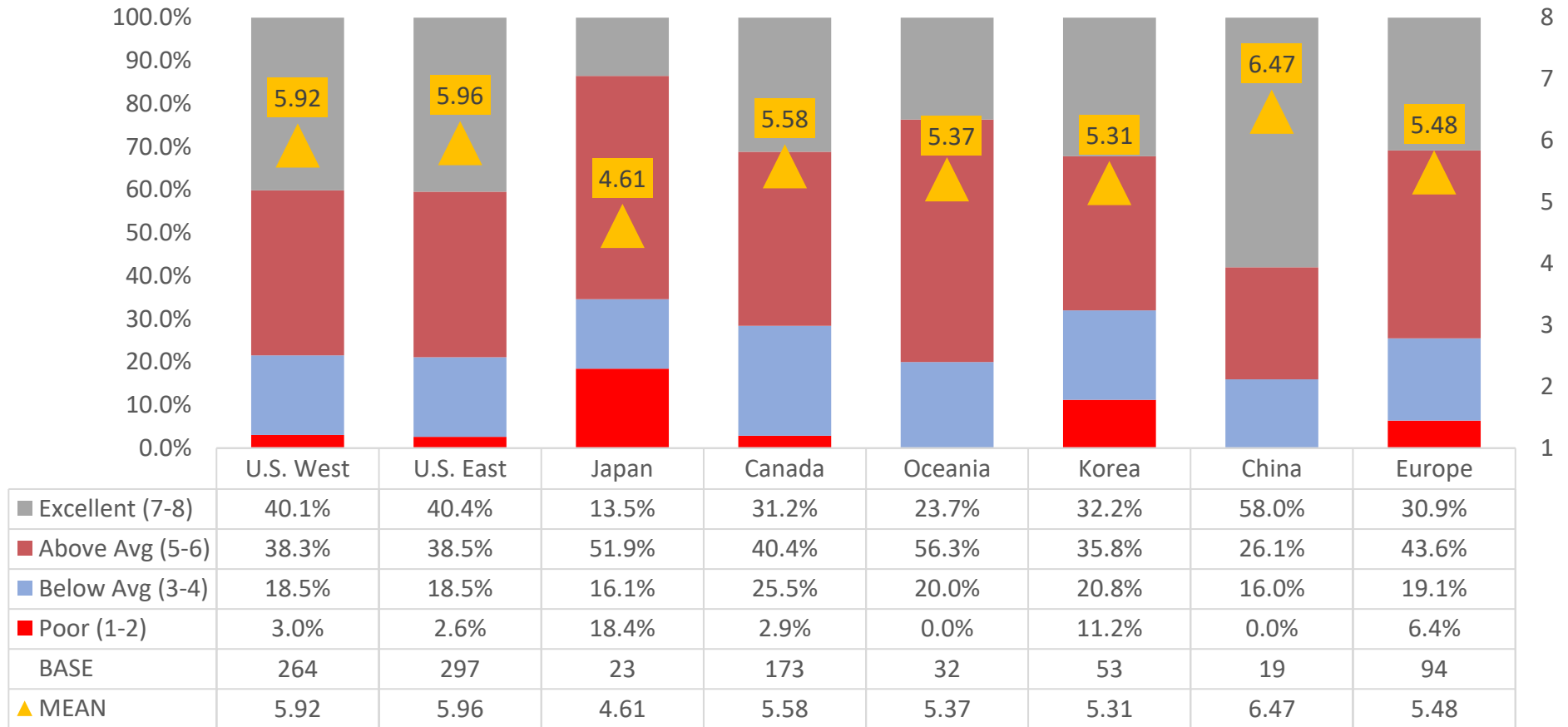
# VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



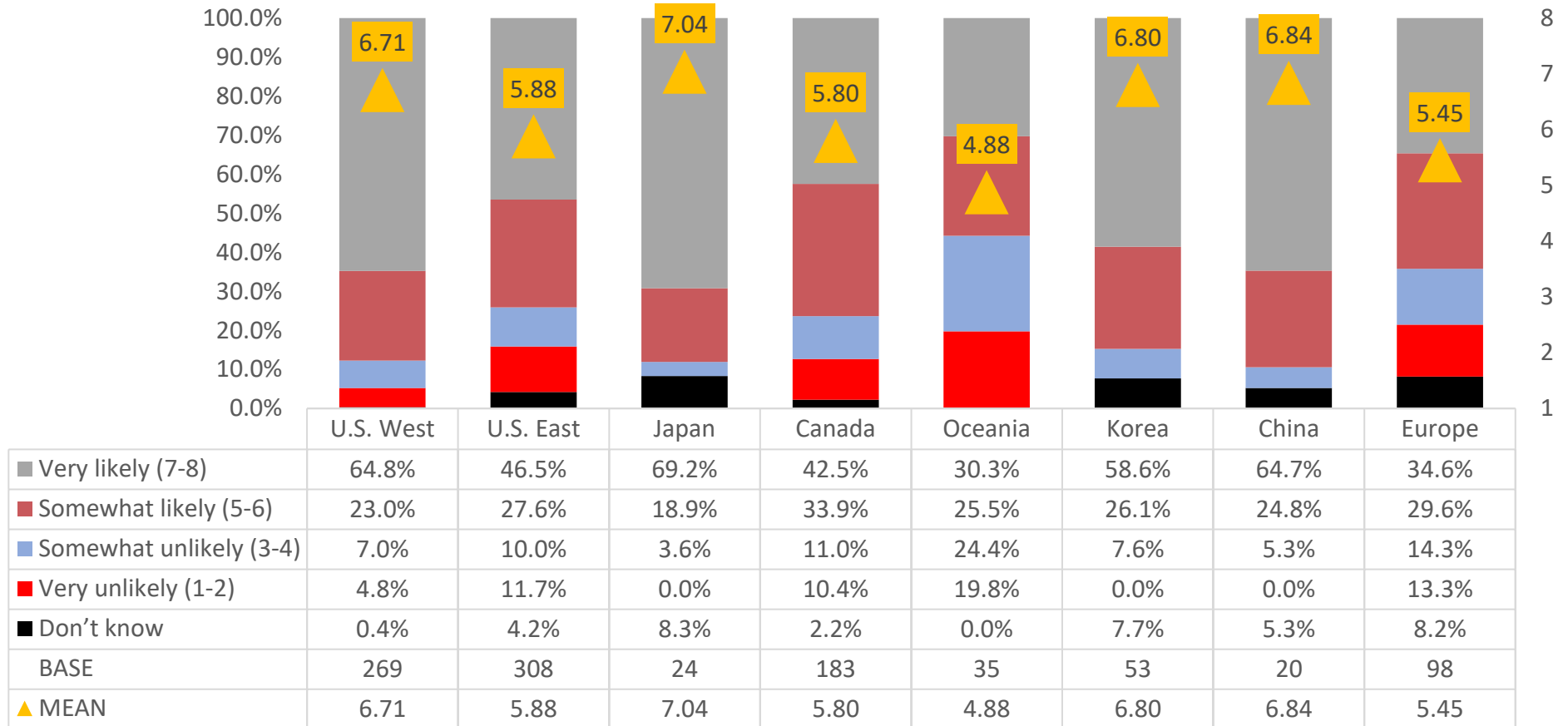
# VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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

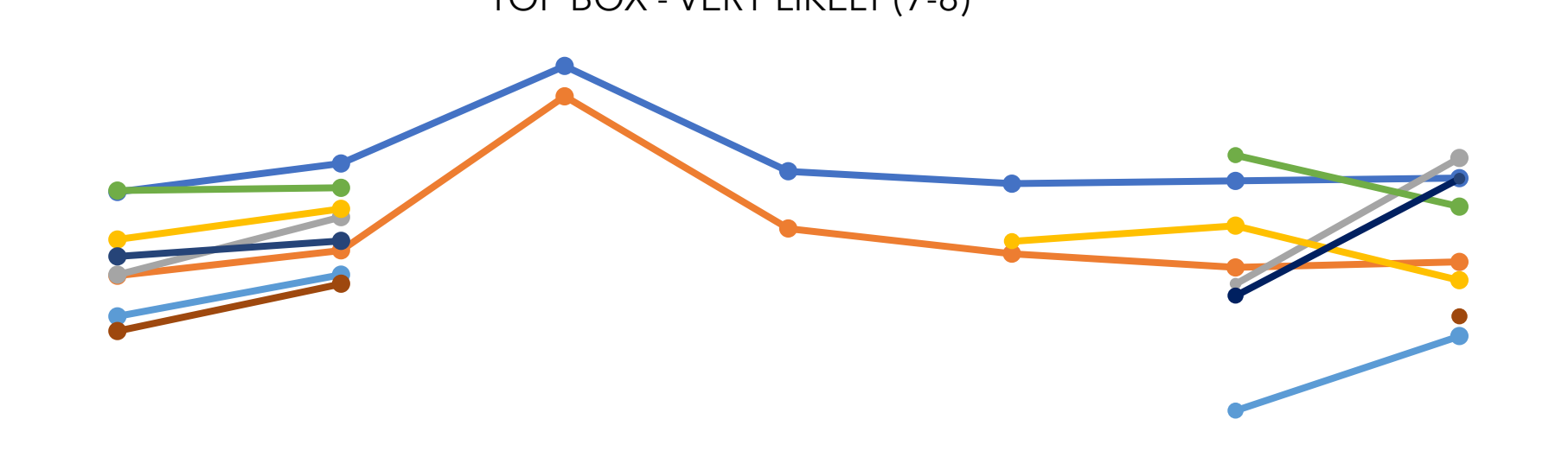




# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

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

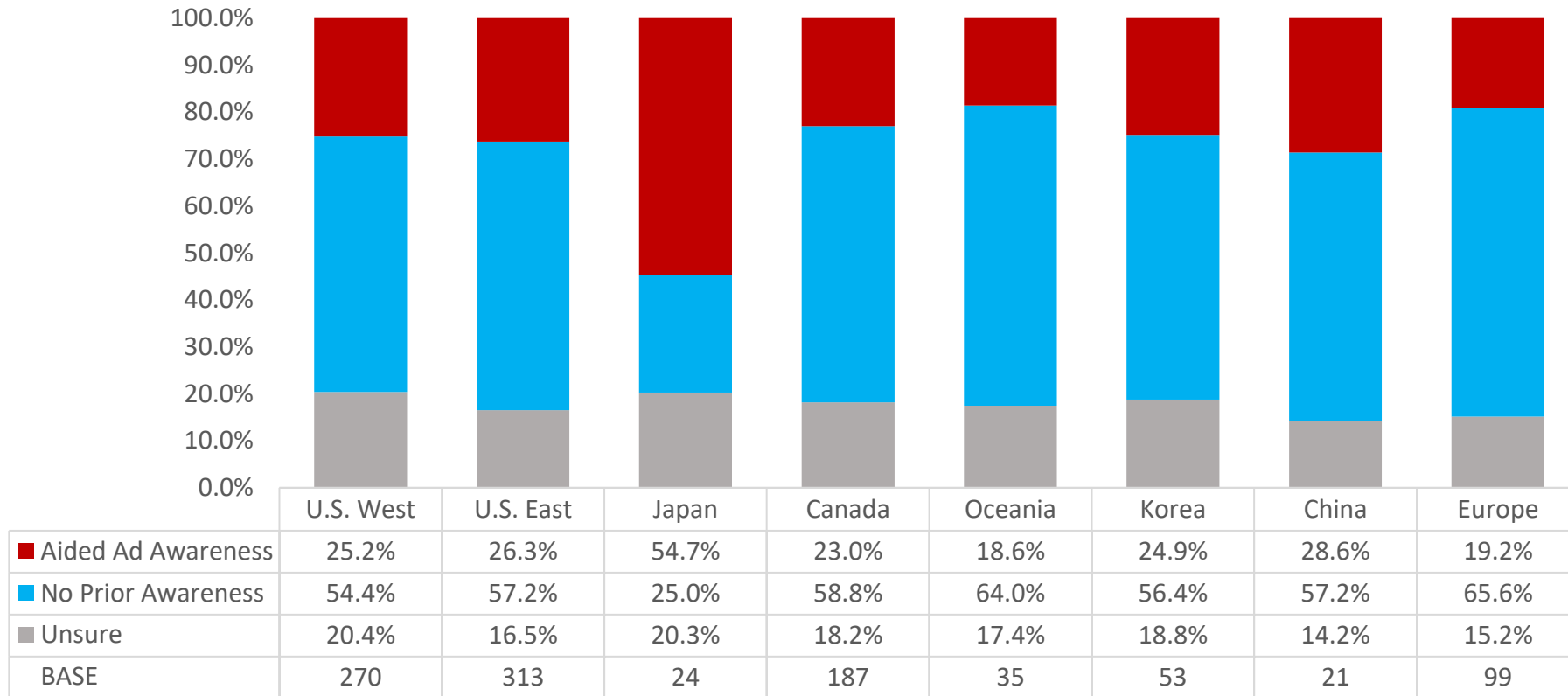


|           | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 | Q2 2023 | Q2 2024 P |
|-----------|---------|---------|---------|---------|---------|---------|-----------|
| U.S. West | 61.8%   | 68.0%   | 89.3%   | 66.3%   | 63.6%   | 64.2%   | 64.8%     |
| U.S. East | 43.5%   | 49.0%   | 82.7%   | 53.8%   | 48.3%   | 45.3%   | 46.5%     |
| Japan     | 43.7%   | 56.3%   |         |         |         | 41.7%   | 69.2%     |
| Canada    | 51.4%   | 58.1%   |         |         | 51.0%   | 54.4%   | 42.5%     |
| Oceania   | 34.6%   | 43.7%   |         |         |         | 14.0%   | 30.3%     |
| Korea     | 62.1%   | 62.7%   |         |         |         | 69.8%   | 58.6%     |
| China     | 47.7%   | 51.1%   |         |         |         | 39.1%   | 64.7%     |
| Europe    | 31.4%   | 41.7%   |         |         |         |         | 34.6%     |

P= Preliminary Data

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

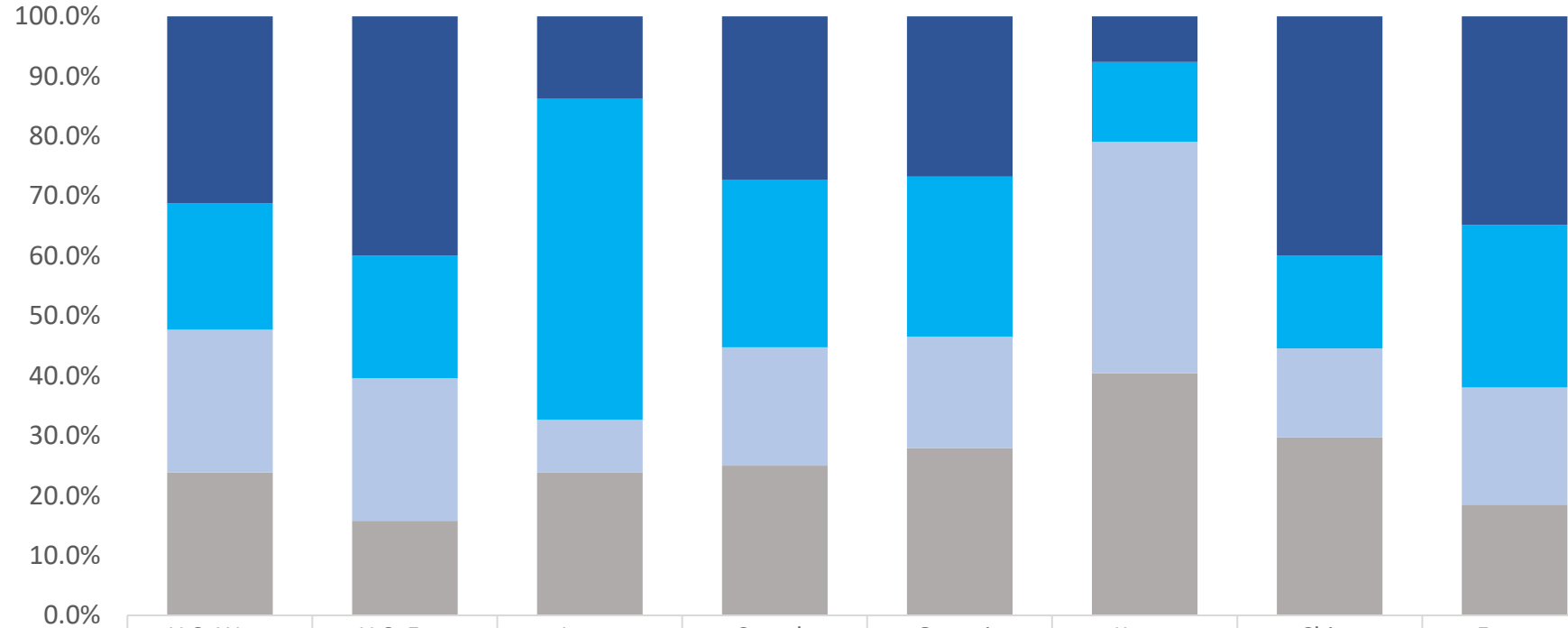
# AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



# MOTIVATING FACTORS - ISLAND OF HAWAI'I

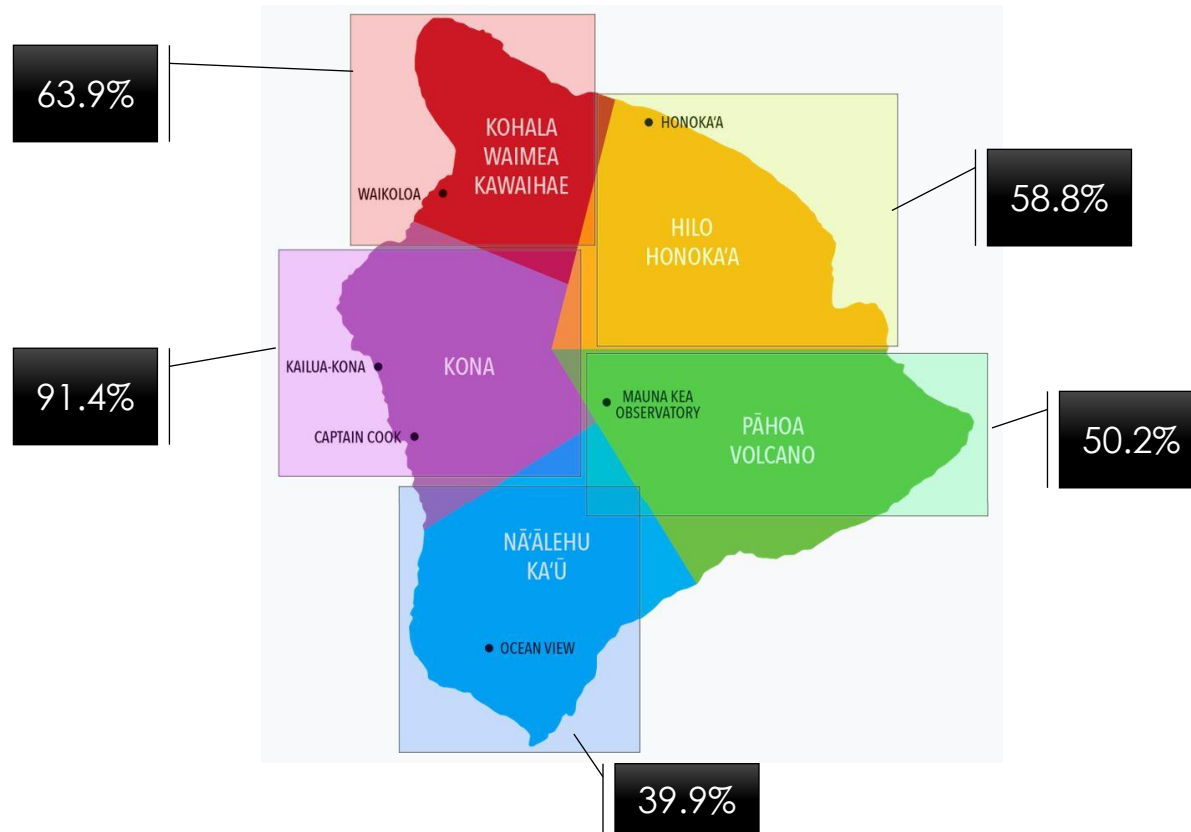
|  | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>Famous landmarks or imagery/<br/>natural beauty</b>     | 38.5%     | 56.3%     | 88.1% | 53.5%  | 65.1%   | 71.7% | 56.6% | 56.6%  |
| <b>Outdoor or sporting activities and<br/>events</b>       | 22.6%     | 14.0%     | 10.8% | 18.8%  | 18.6%   | 33.3% | 13.3% | 15.2%  |
| <b>Social media posts and videos</b>                       | 8.9%      | 13.5%     | 7.2%  | 14.4%  | 5.8%    | 14.2% | 17.0% | 20.2%  |
| <b>Hawaiian cultural events</b>                            | 10.0%     | 13.1%     | 3.6%  | 12.3%  | 7.0%    | 14.5% | 0.0%  | 11.1%  |
| <b>Television programs or movies<br/>filmed in Hawai'i</b> | 6.3%      | 8.1%      | 10.8% | 6.4%   | 8.1%    | 23.9% | 11.3% | 20.2%  |
| <b>Hawaiian music</b>                                      | 6.7%      | 6.1%      | 7.2%  | 6.9%   | 2.3%    | 5.0%  | 1.9%  | 9.1%   |
| <b>BASE</b>  | 270       | 313       | 24    | 187    | 35      | 21    | 53    | 99     |

# TRAVEL ON ISLAND OF HAWAI'I

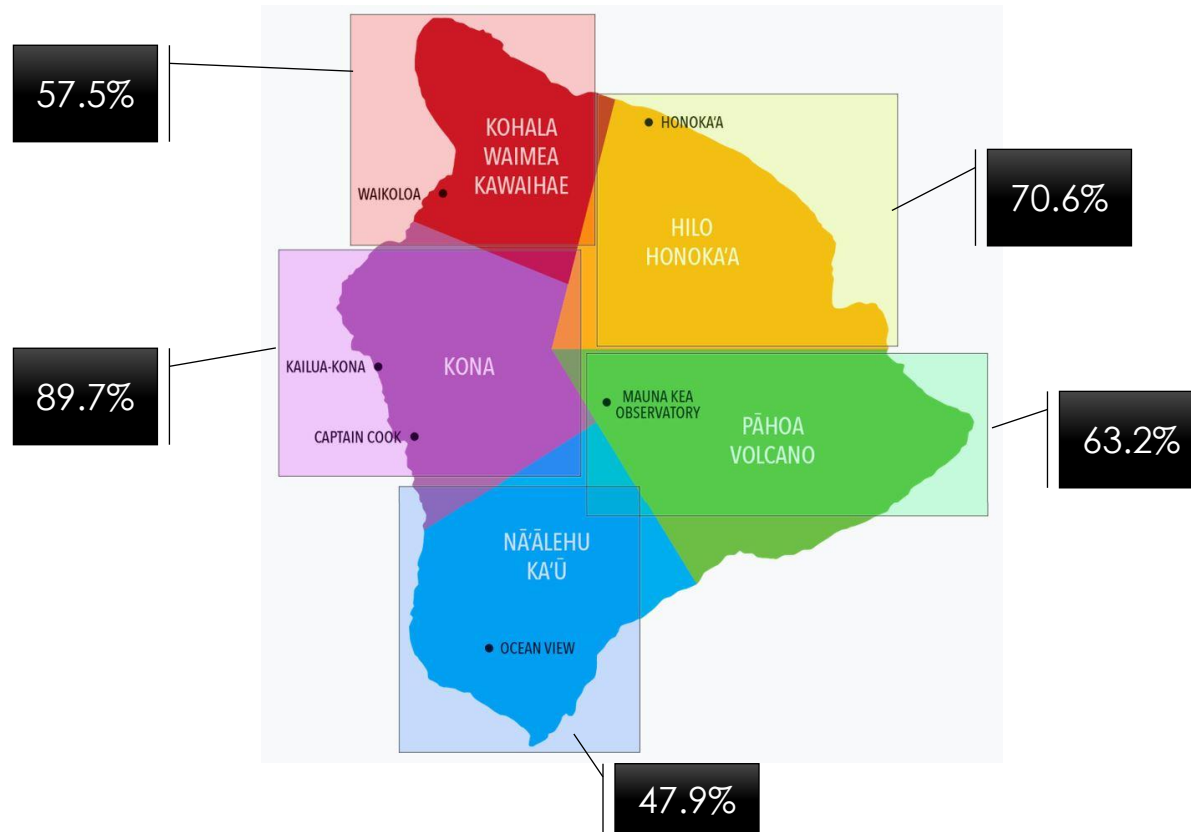


|   | U.S. West | U.S. East | Japan | Canada | Oceania | Korea | China | Europe |
|---|-----------|-----------|-------|--------|---------|-------|-------|--------|
| Traveled to other side of island                      | 31.2%     | 40.0%     | 13.7% | 27.3%  | 26.8%   | 7.6%  | 39.9% | 34.8%  |
| Traveled more than 1 hour one way to reach activities | 21.1%     | 20.4%     | 53.6% | 27.9%  | 26.7%   | 13.3% | 15.5% | 27.2%  |
| Traveled 1 hour or less one way to reach activity     | 23.8%     | 23.8%     | 8.7%  | 19.8%  | 18.6%   | 38.6% | 14.9% | 19.6%  |
| Enjoy activities- short drive from accommodations     | 23.9%     | 15.8%     | 23.9% | 25.0%  | 27.9%   | 40.4% | 29.7% | 18.5%  |
| BASE  | 256       | 299       | 23    | 172    | 35      | 52    | 20    | 92     |

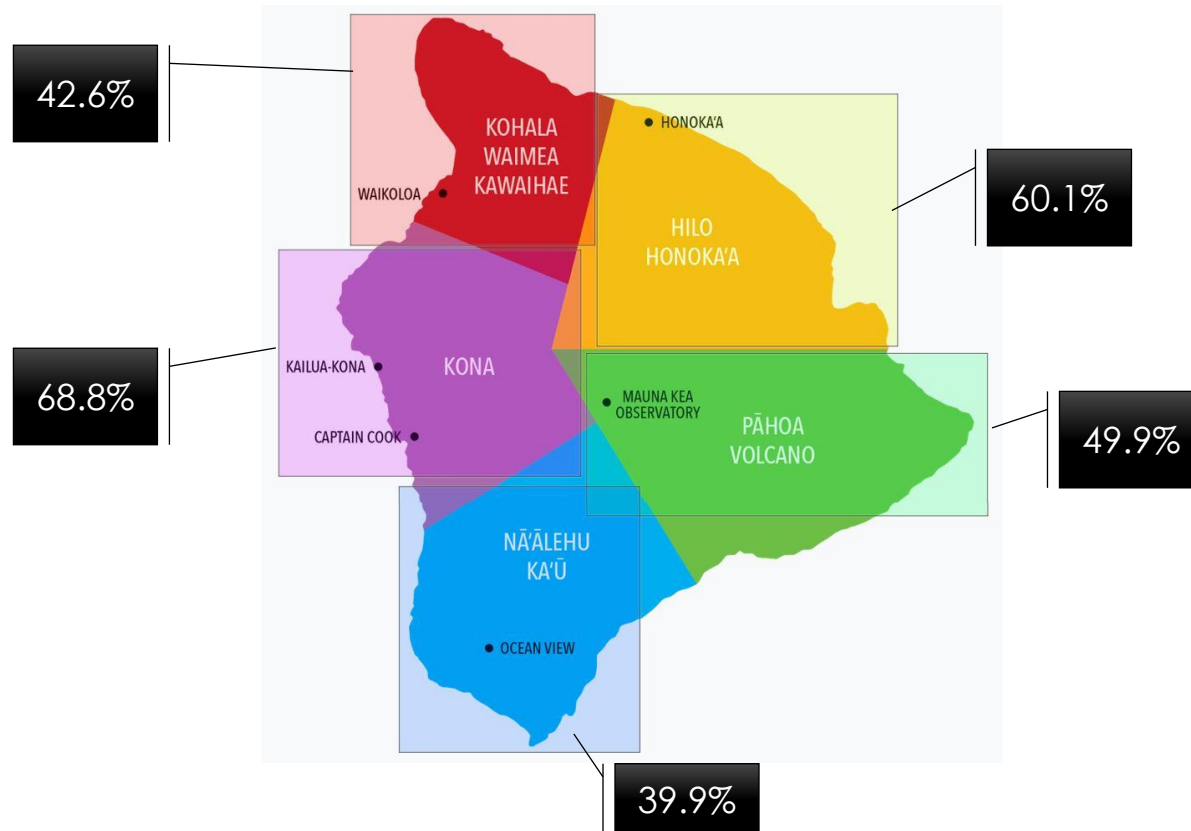
# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



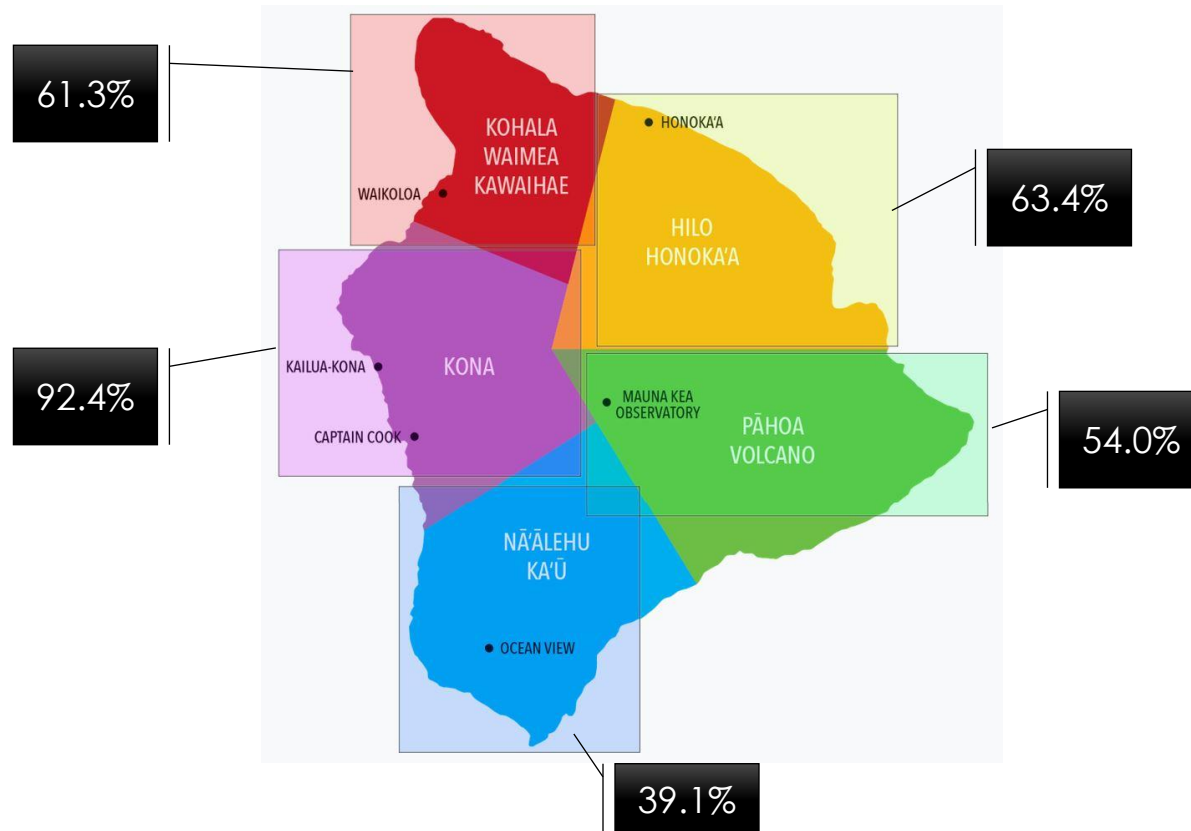
# AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



# AREAS VISITED ISLAND OF HAWAI'I JAPAN

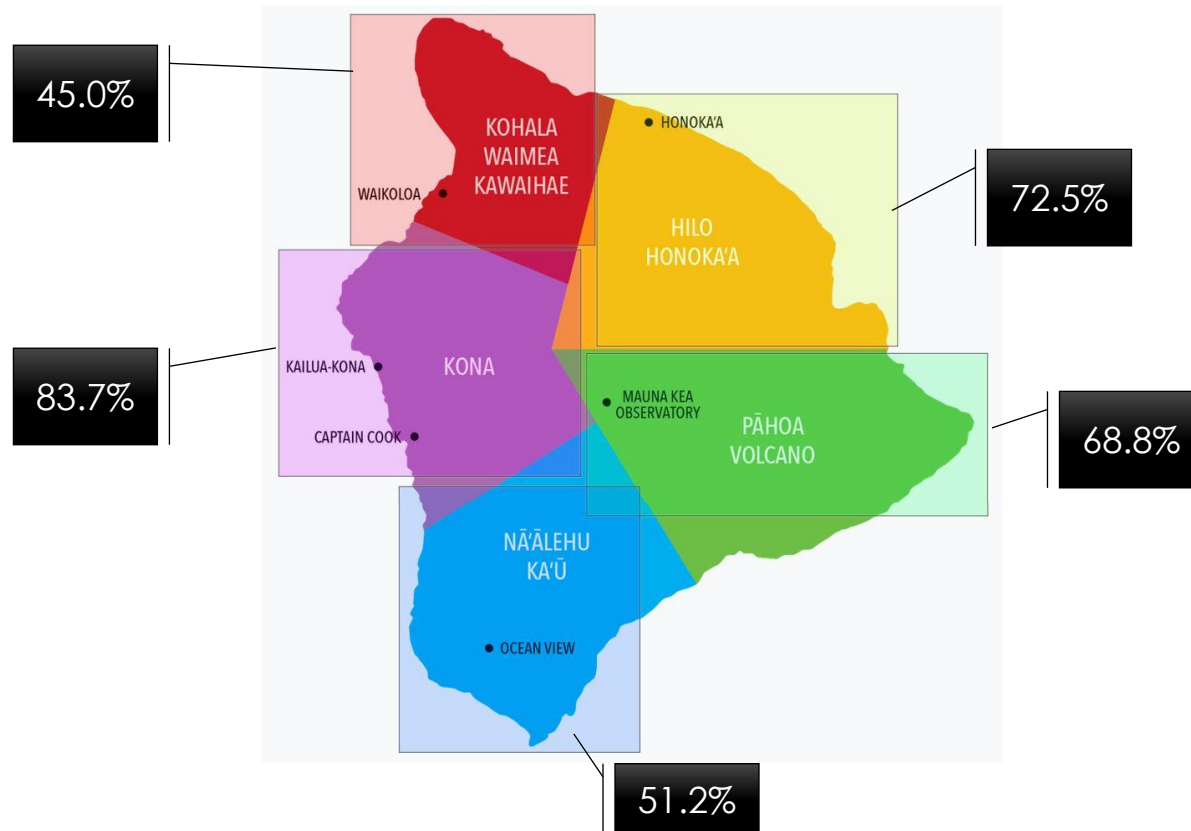


# AREAS VISITED ISLAND OF HAWAI'I CANADA

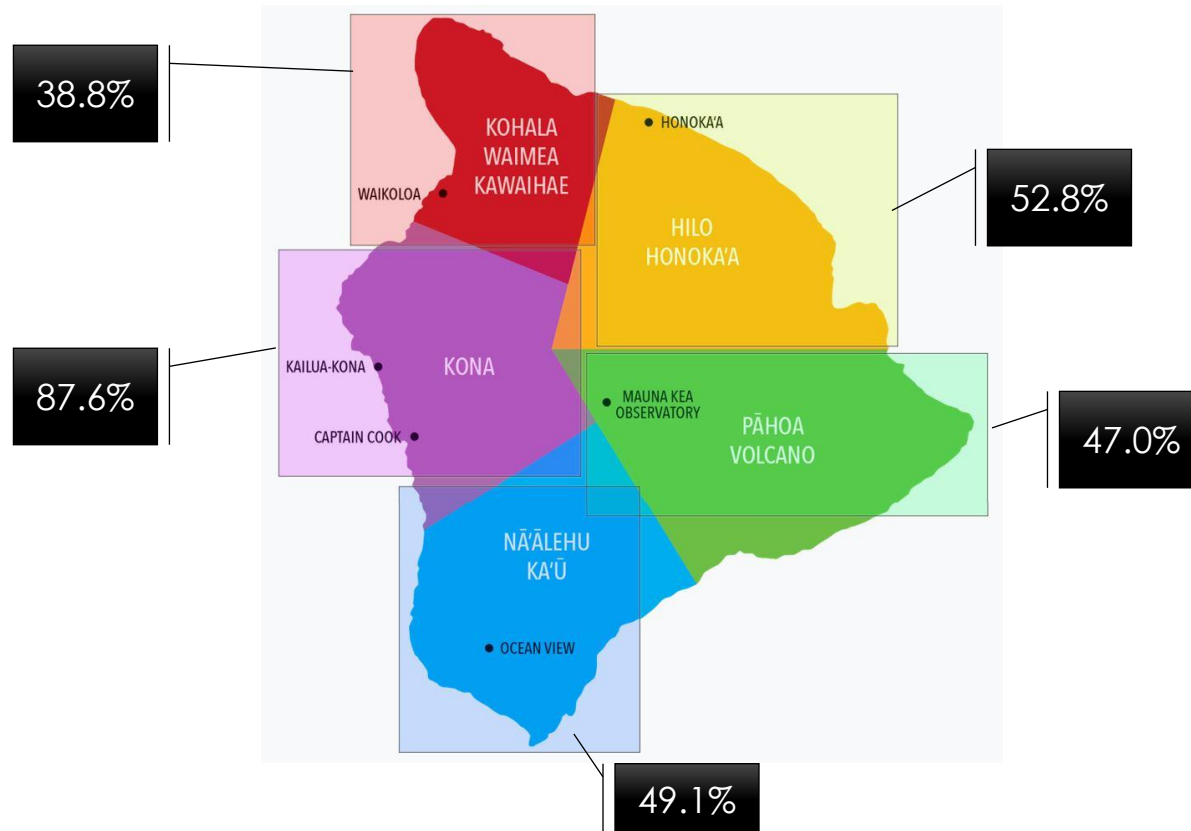




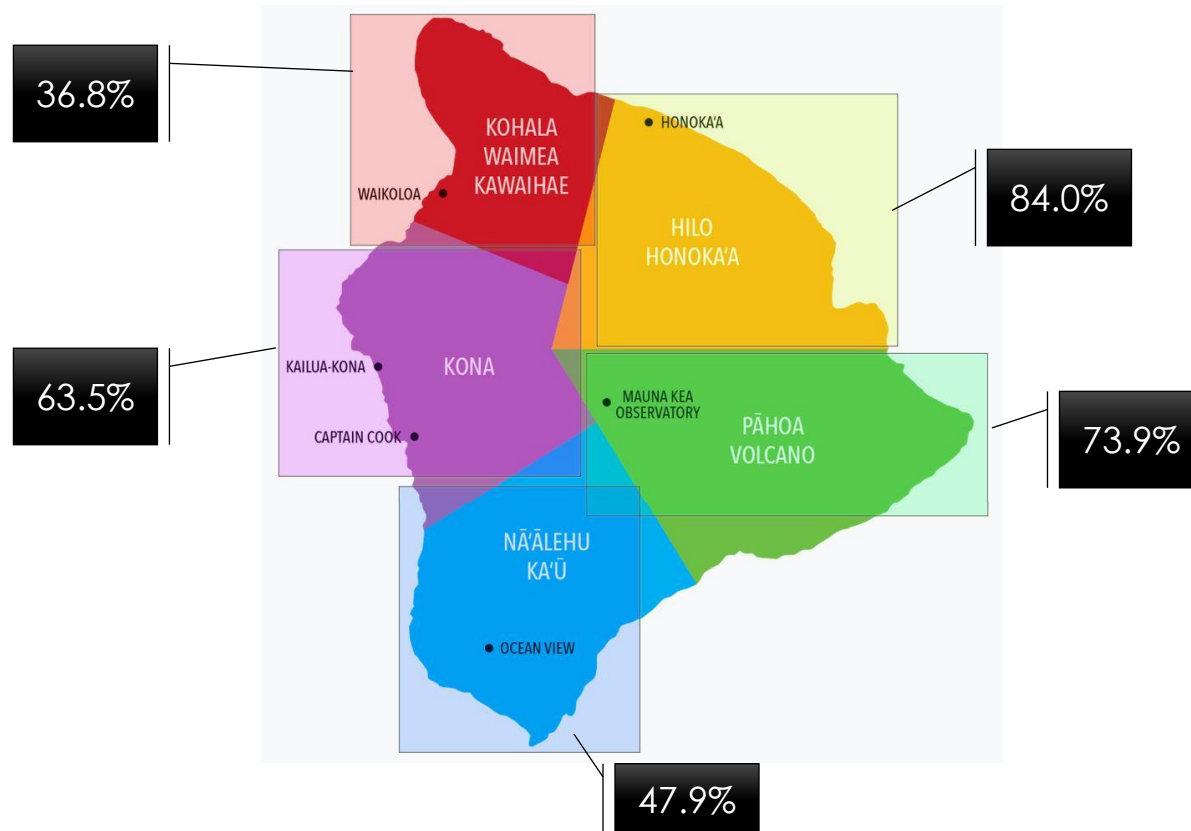
# AREAS VISITED ISLAND OF HAWAI'I OCEANIA



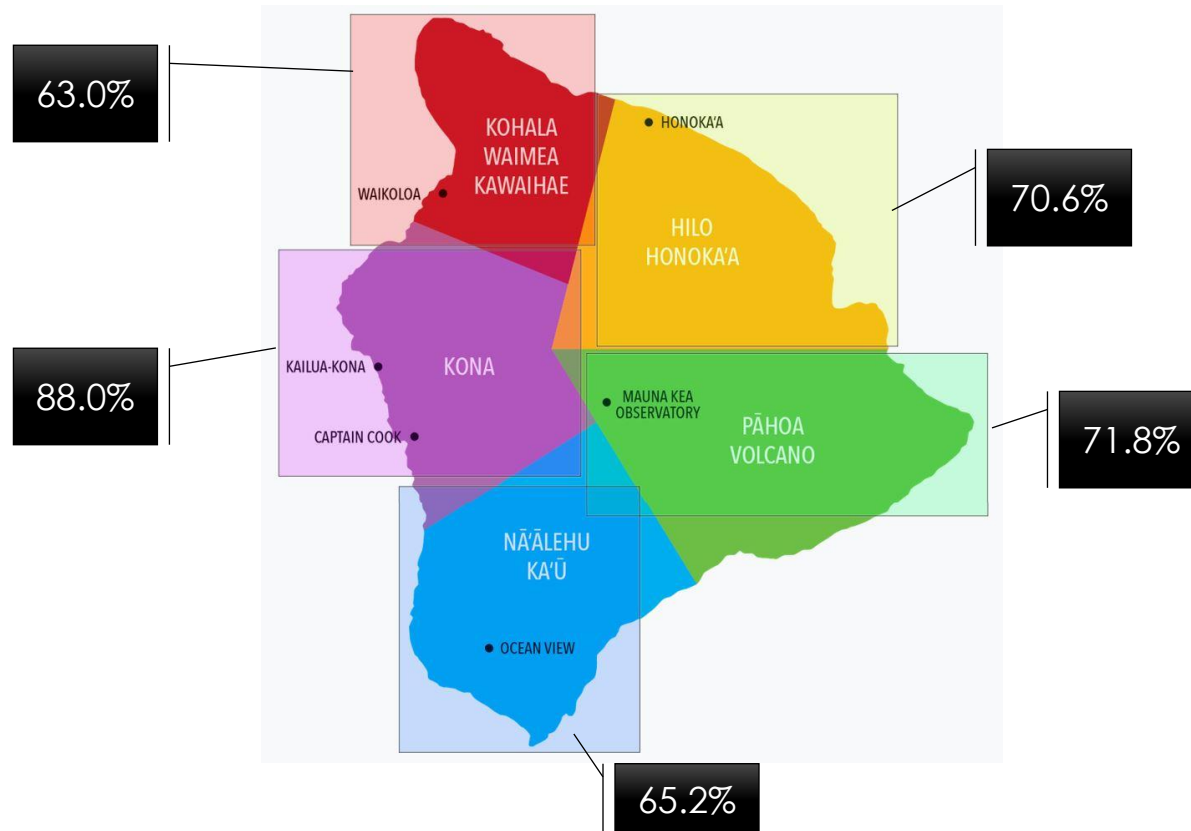
# AREAS VISITED ISLAND OF HAWAI'I KOREA



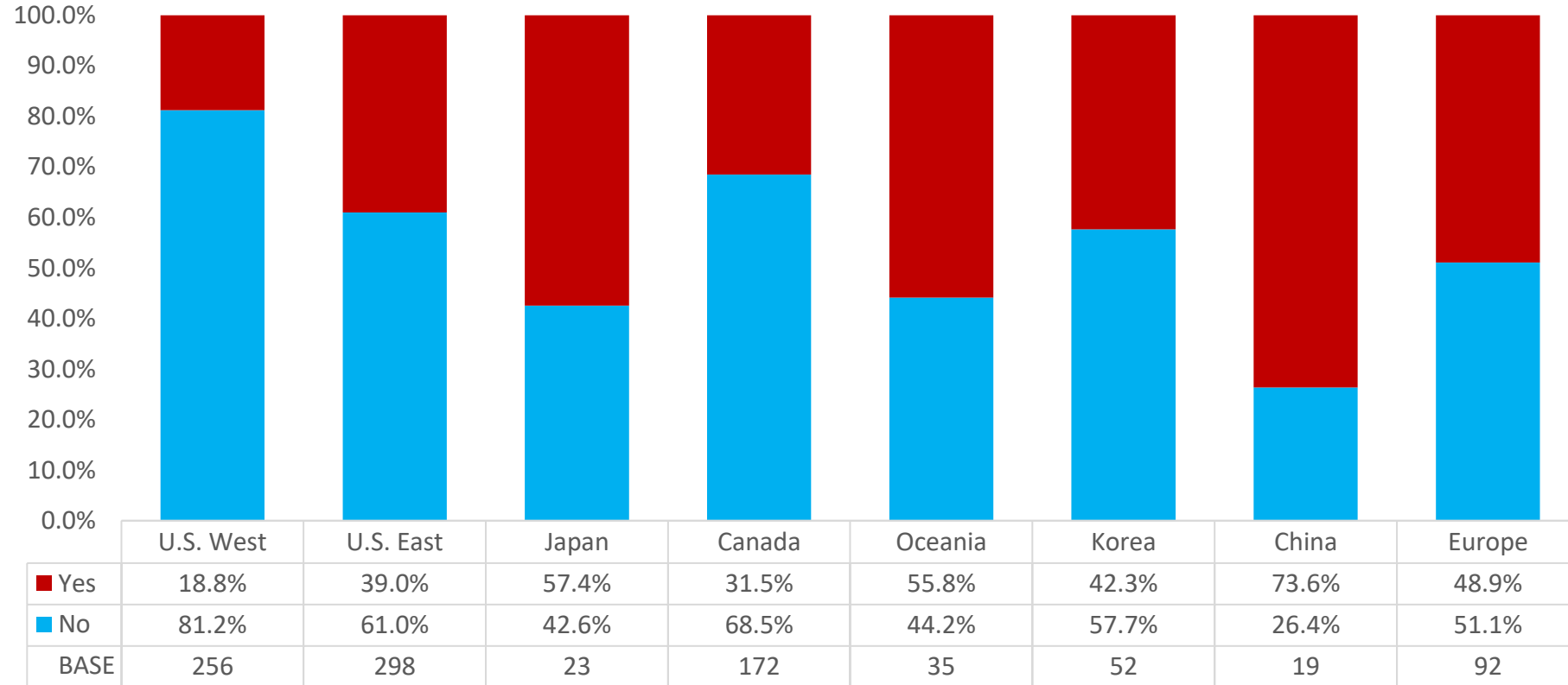
# AREAS VISITED ISLAND OF HAWAI'I CHINA



# AREAS VISITED ISLAND OF HAWAI'I EUROPE

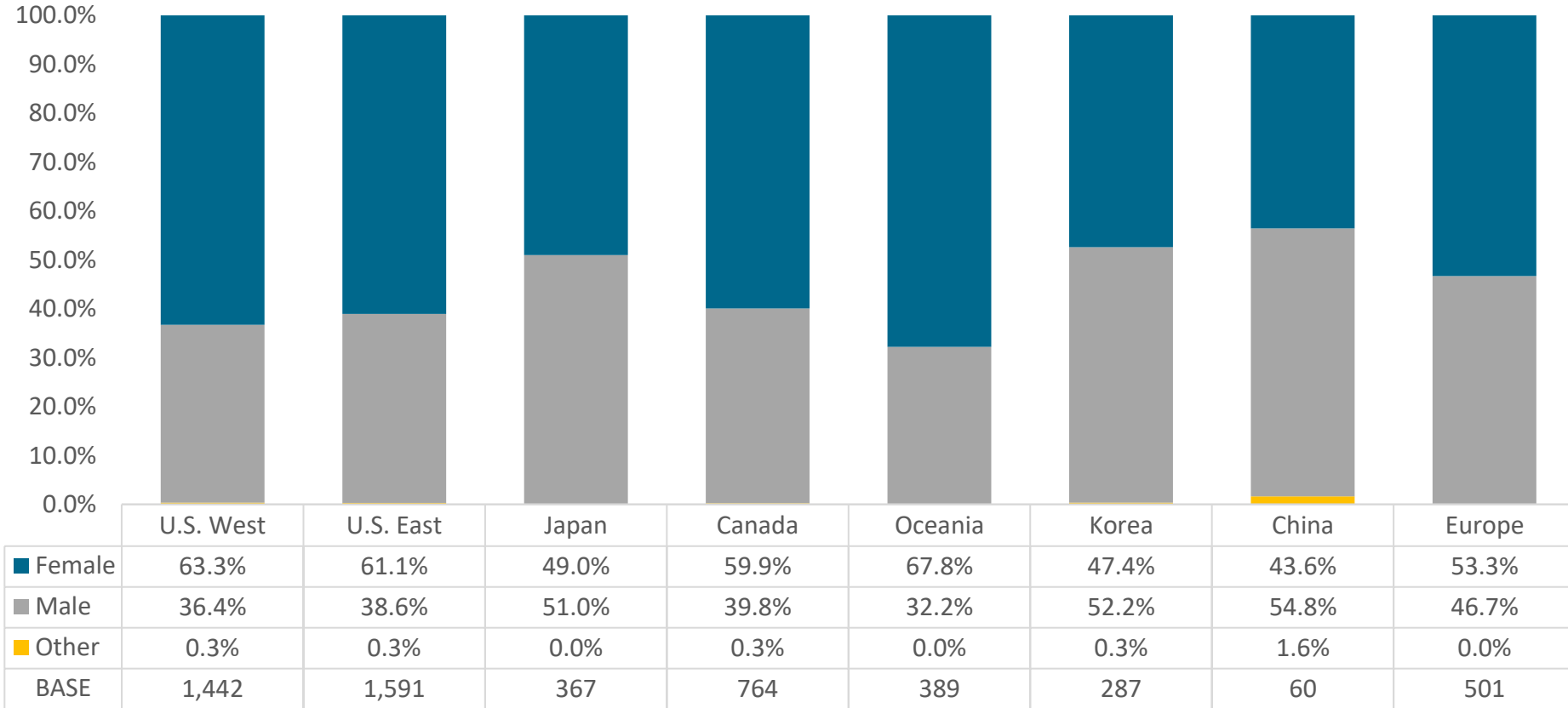


# VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

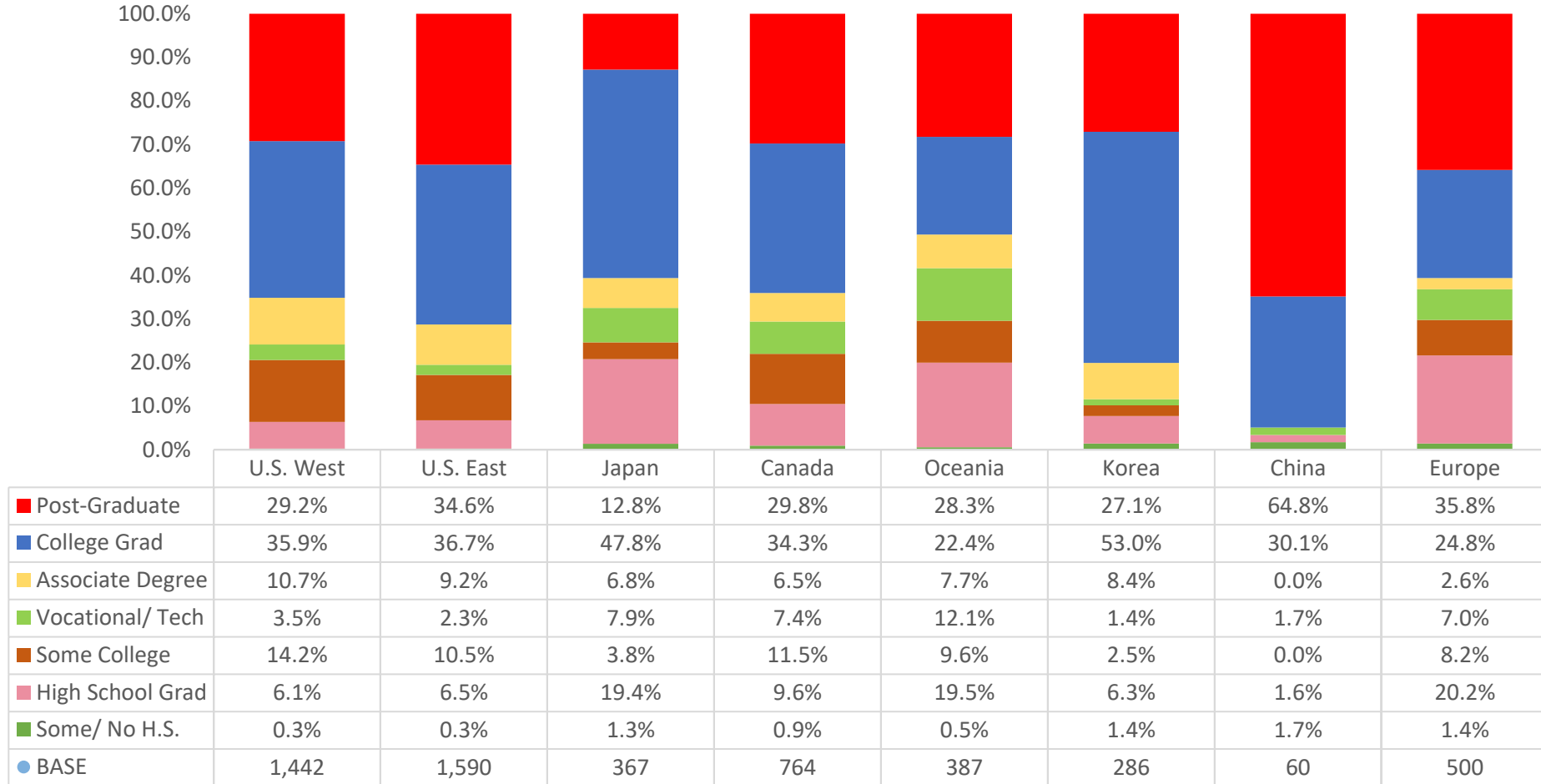


# Section 9 – Visitor Profile

# VISITOR PROFILE - GENDER



# VISITOR PROFILE - EDUCATION





# VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

|                        | U.S. West | U.S. East | Canada | Oceania | Europe |
|------------------------|-----------|-----------|--------|---------|--------|
| < \$40,000             | 3.1%      | 5.1%      | 5.0%   | 7.8%    | 18.1%  |
| \$40,000 to \$59,999   | 5.7%      | 6.4%      | 9.3%   | 10.5%   | 12.4%  |
| \$60,000 to \$79,999   | 9.0%      | 7.8%      | 8.8%   | 11.0%   | 10.1%  |
| \$80,000 to \$99,999   | 9.4%      | 9.7%      | 9.2%   | 9.8%    | 12.4%  |
| \$100,000 to \$124,999 | 13.6%     | 14.3%     | 13.6%  | 12.5%   | 15.2%  |
| \$125,000 to \$149,999 | 11.6%     | 11.4%     | 11.2%  | 10.6%   | 5.7%   |
| \$150,000 to \$174,999 | 8.6%      | 9.5%      | 9.5%   | 12.5%   | 7.6%   |
| \$175,000 to \$199,999 | 7.3%      | 6.0%      | 8.2%   | 7.5%    | 4.6%   |
| \$200,000 to \$249,999 | 11.0%     | 9.3%      | 10.9%  | 7.6%    | 5.0%   |
| \$250,000 +            | 20.6%     | 20.4%     | 14.3%  | 10.3%   | 8.9%   |

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

|                       | Japanese |
|-----------------------|----------|
| < ¥3.5 million        | 11.5%    |
| ¥3.5 - ¥4.5 million   | 9.7%     |
| ¥4.5 - ¥5.5 million   | 11.8%    |
| ¥5.5 - ¥6.5 million   | 8.6%     |
| ¥6.5 - ¥7.5 million   | 4.9%     |
| ¥7.5 - ¥8.5 million   | 8.2%     |
| ¥8.5 - ¥10.0 million  | 9.2%     |
| ¥10.0 - ¥15.0 million | 21.4%    |
| ¥15.0 - ¥20.0 million | 5.8%     |
| ¥20.0 million +       | 8.8%     |

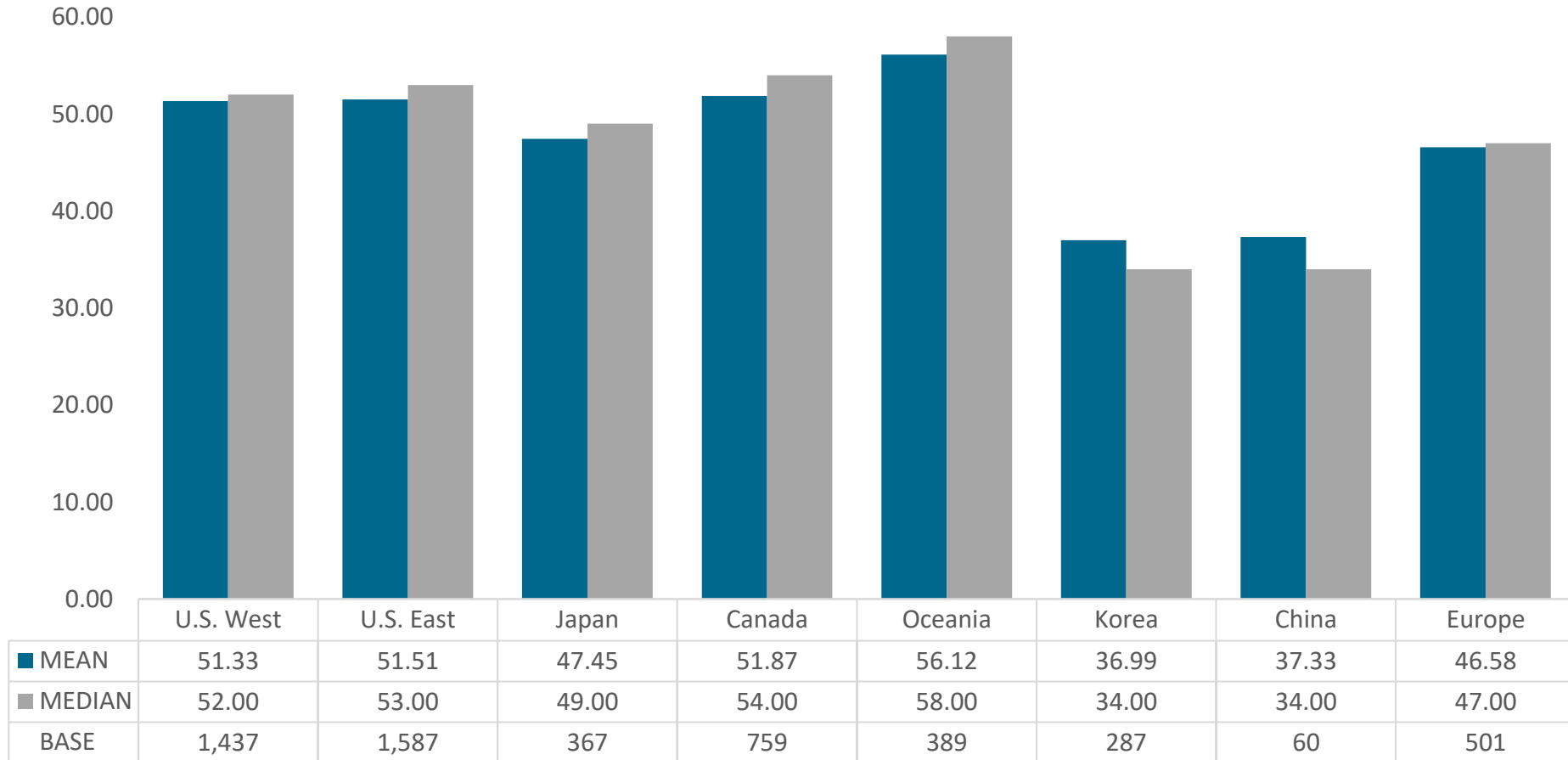
# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

|                          | Korean |
|--------------------------|--------|
| < ₩16,305,000            | 9.1%   |
| ₩16,305,000-27,173,999   | 5.8%   |
| ₩27,174,000-38,041,999   | 6.8%   |
| ₩38,042,000-48,911,999   | 11.6%  |
| ₩48,912,000-59,781,999   | 7.6%   |
| ₩59,782,000-70,652,999   | 8.7%   |
| ₩70,653,000-81,520,999   | 12.0%  |
| ₩81,521,000-92,390,999   | 7.9%   |
| ₩92,391,000-103,259,999  | 4.7%   |
| ₩103,260,000-149,999,999 | 12.1%  |
| ₩150,000,000-199,999,999 | 5.5%   |
| ₩200,000,000+            | 8.1%   |

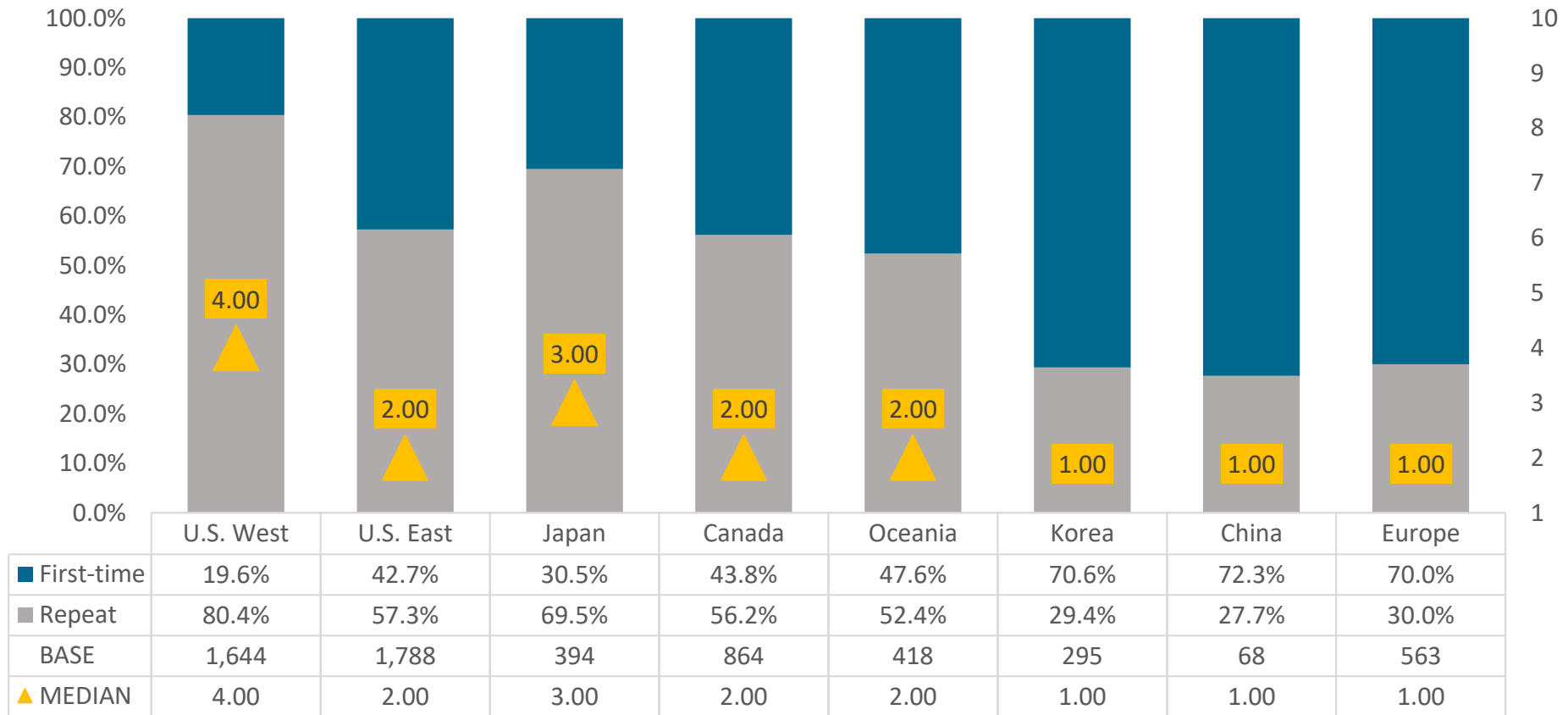
# VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

|                        | China |
|------------------------|-------|
| <¥250,799              | 7.5%  |
| ¥250,800 – 376,099     | 22.0% |
| ¥376,100 – 501,399     | 5.6%  |
| ¥501,400 – 626,799     | 14.8% |
| ¥626,800 – 783,499     | 3.6%  |
| ¥783,500 – 940,199     | 7.3%  |
| ¥940,200 – 1,096,899   | 7.4%  |
| ¥1,096,900-1,253,599   | 7.3%  |
| ¥1,253,600 – 1,560,799 | 5.6%  |
| ¥1,560,800+            | 19.0% |

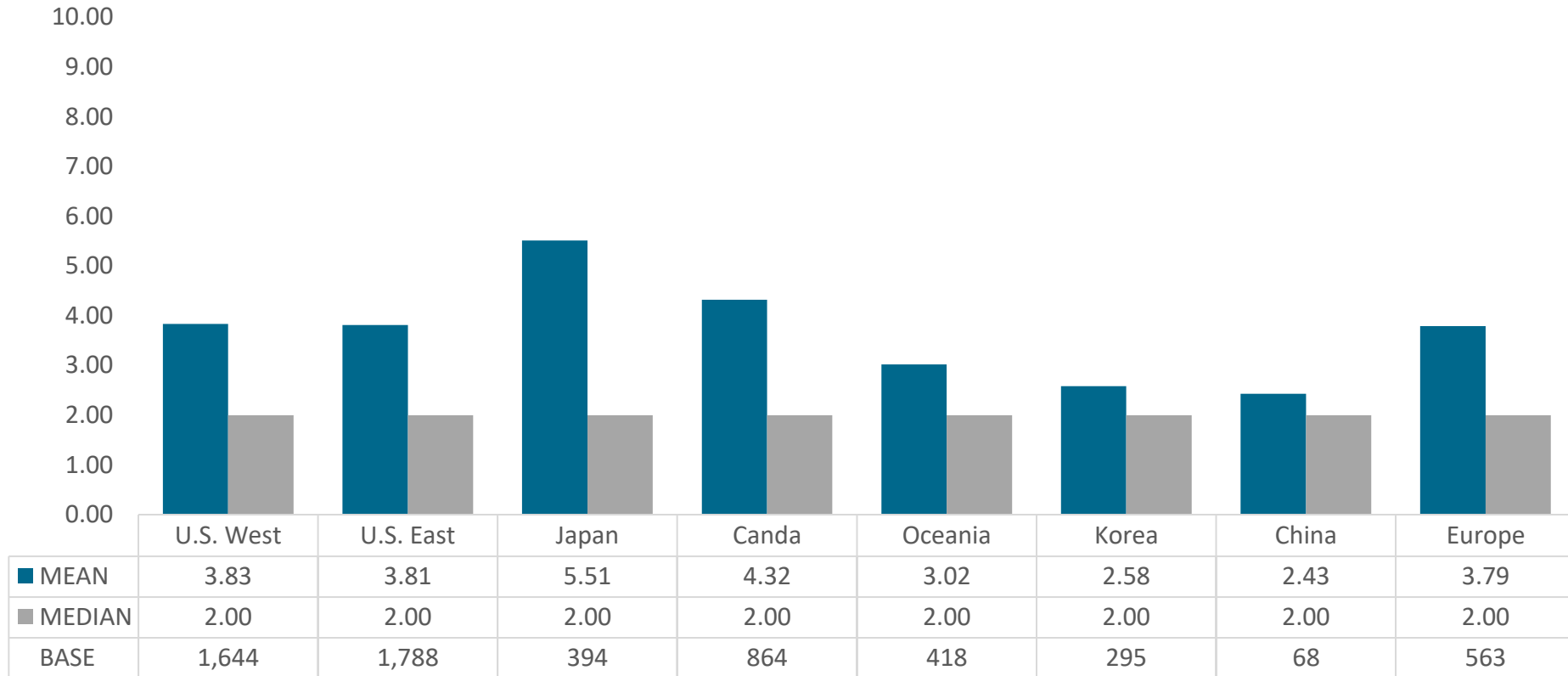
# VISITOR PROFILE - AGE



# 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 |
|--|-----------|-----------|-------|--------|---------|-------|-------|--------|
| <b>My spouse</b>                                 | 58.3%     | 59.8%     | 60.5% | 60.9%  | 67.1%   | 66.6% | 39.6% | 45.6%  |
| <b>Other adult members of my family</b>          | 30.3%     | 30.5%     | 21.3% | 29.0%  | 22.1%   | 17.1% | 22.3% | 16.5%  |
| <b>My child(ren)/ grandchild(ren) under 18</b>   | 28.7%     | 23.6%     | 15.7% | 19.2%  | 22.7%   | 17.3% | 11.8% | 12.6%  |
| <b>My friends/ associates</b>                    | 14.6%     | 15.1%     | 15.6% | 17.0%  | 11.0%   | 10.5% | 18.9% | 16.9%  |
| <b>Myself only (traveled alone/ no one else)</b> | 9.0%      | 10.7%     | 12.6% | 7.6%   | 9.1%    | 7.8%  | 20.6% | 14.9%  |
| <b>My girlfriend/ boyfriend</b>                  | 7.4%      | 5.1%      | 2.2%  | 5.9%   | 3.6%    | 1.7%  | 6.0%  | 12.1%  |
| <b>Same gender partner</b>                       | 0.9%      | 1.1%      | 0.3%  | 1.2%   | 0.4%    | 0.0%  | 0.0%  | 1.4%   |



# 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 | 848       | 3.37             |
| U.S. East | 1,138     | 2.91             |
| Japan     | 380       | 5.03             |
| Canada    | 431       | 4.72             |
| Oceania   | 403       | 4.88             |
| Korea     | 59        | 12.76            |
| China     | 276       | 5.90             |
| Europe    | 441       | 4.67             |
| All MMAs  | 3,976     | 1.55             |

\* 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 | 286       | 5.79              |
| U.S. East | 400       | 4.90              |
| Japan     | 4         | 49.00             |
| Canada    | 174       | 7.43              |
| Oceania   | 18        | 23.10             |
| Korea     | 5         | 43.83             |
| China     | 5         | 43.83             |
| Europe    | 122       | 8.87              |
| All MMAs  | 1,014     | 3.08              |

\* 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 | 372       | 5.08              |
| U.S. East | 502       | 4.37              |
| Japan     | 8         | 34.65             |
| Canada    | 250       | 6.20              |
| Oceania   | 20        | 21.91             |
| Korea     | 9         | 32.67             |
| China     | 11        | 29.55             |
| Europe    | 164       | 7.65              |
| All MMAs  | 1,336     | 2.68              |

\* 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 | 292       | 5.74              |
| U.S. East | 398       | 4.91              |
| Japan     | 25        | 19.60             |
| Canada    | 223       | 6.56              |
| Oceania   | 39        | 15.69             |
| Korea     | 55        | 13.21             |
| China     | 25        | 19.60             |
| Europe    | 150       | 8.00              |
| All MMAs  | 1,207     | 2.82              |

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

