

VISITOR SATISFACTION STUDY QUARTER 3, 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 86)
- Section 7 - Island of Maui (slide 117)
- Section 8 - Island of Hawai'i (slide 149)
- Section 9 - Visitor Profile (slide 176)
- Section 10 - Island Survey Methodology (slide 187)

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 3, 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 ±	Response Rate
U.S. West	1,355	2.66	12.83
U.S. East	1,720	2.36	16.89
Japan	418	4.79	23.06
Canada	853	3.36	18.29
Oceania	443	4.66	15.46
Korea	255	6.14	4.98
China	30	17.89	38.49
Europe	753	3.57	14.90
All visitor markets	5,827	1.28	18.34

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 3, 2024. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

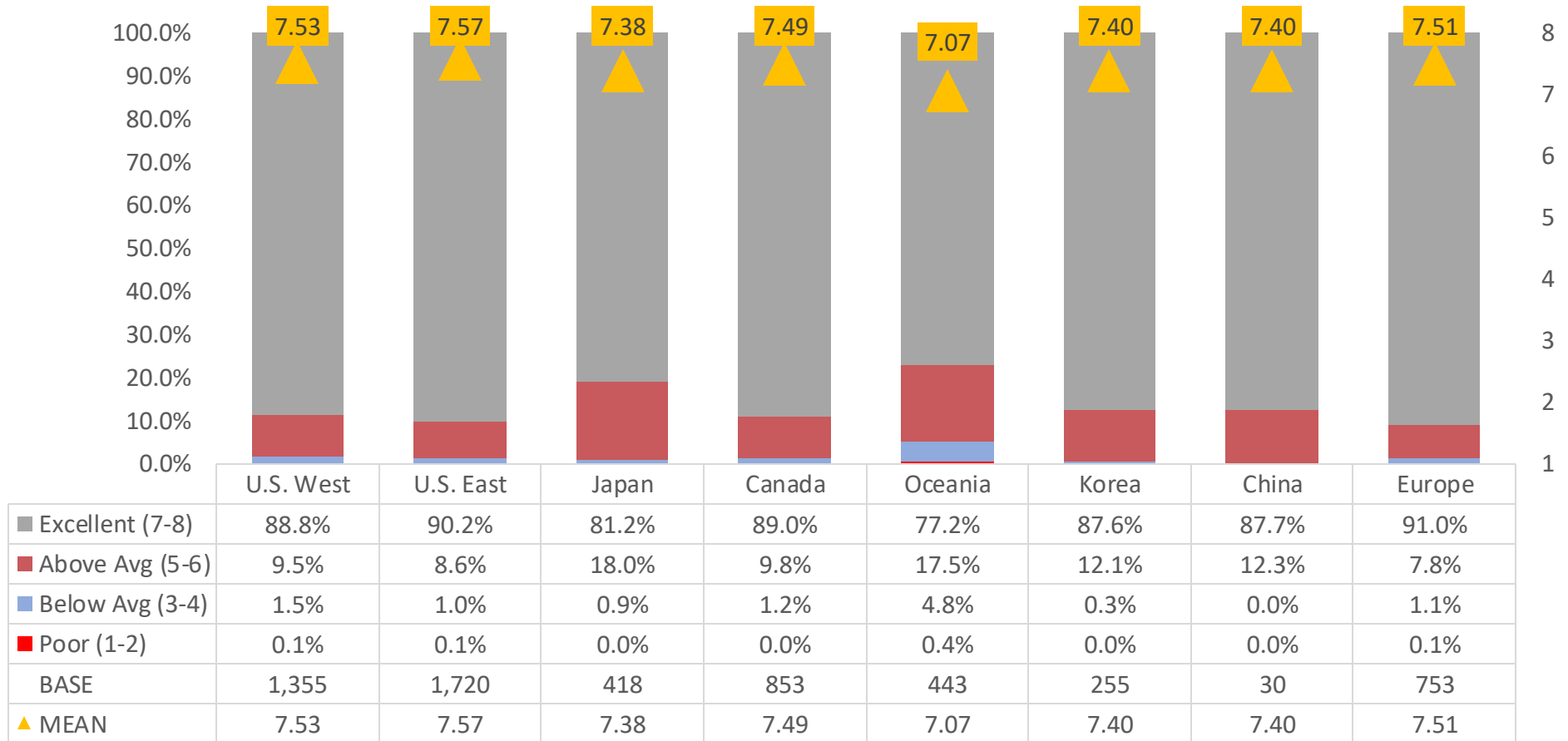
Data for 2024 are preliminary. Data for prior years reflect final visitor statistics from DBEDT Annual Visitor Research reports.

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

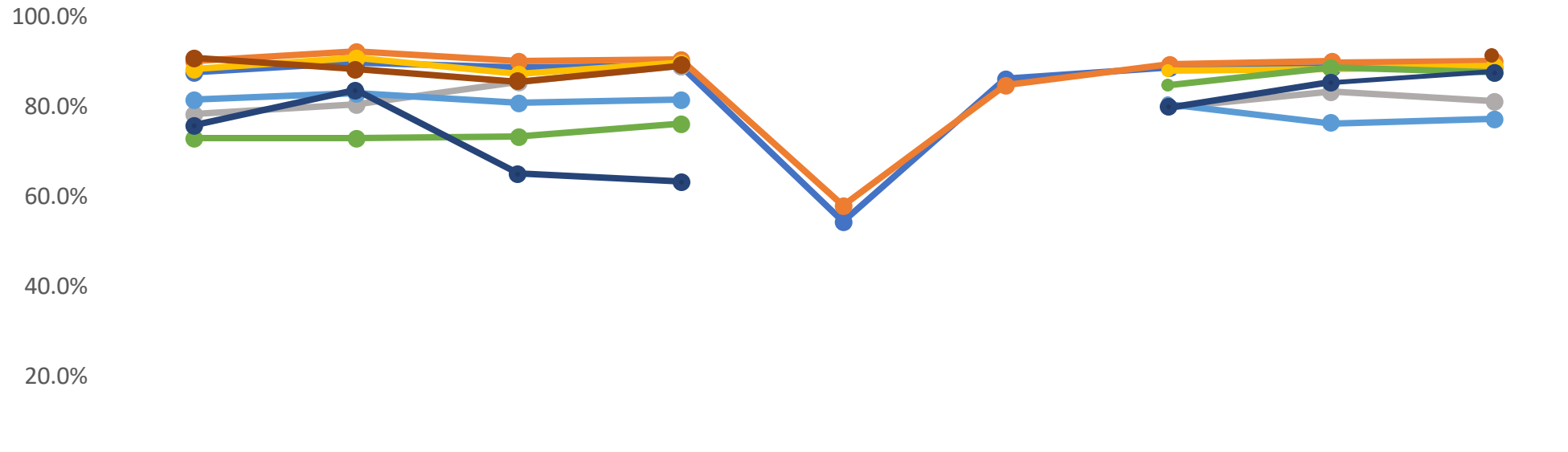


SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents from this visitor market.
- **Age:** Satisfaction was higher among younger visitors (18 – 34 years old) from **U.S. West** and **Japan** compared to older respondents from this market.
- **Household Income:** Visitors from **U.S. West** that reside in homes in the bottom income tier (<\$100K) gave higher satisfaction scores compared to more affluent visitors from this market.

SATISFACTION - STATE OF HAWAI'I BY VISITOR MARKET

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



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Q3 2024 P
U.S. West	87.5%	89.7%	88.8%	89.2%	54.5%	86.0%	88.7%	88.8%	88.8%
U.S. East	90.0%	92.2%	90.0%	90.5%	57.9%	84.9%	89.4%	90.0%	90.2%
Japan	78.3%	80.6%	85.6%	89.2%			79.9%	83.3%	81.2%
Canada	88.4%	91.0%	87.3%	89.7%			87.8%	88.3%	89.0%
Oceania	81.5%	82.9%	80.8%	81.5%			80.5%	76.3%	77.2%
Korea	72.9%	72.9%	73.3%	76.1%			84.7%	88.5%	87.6%
China	75.8%	83.6%	65.0%	63.2%			79.9%	85.3%	87.7%
Europe	90.9%	88.2%	85.6%	89.2%					91.0%

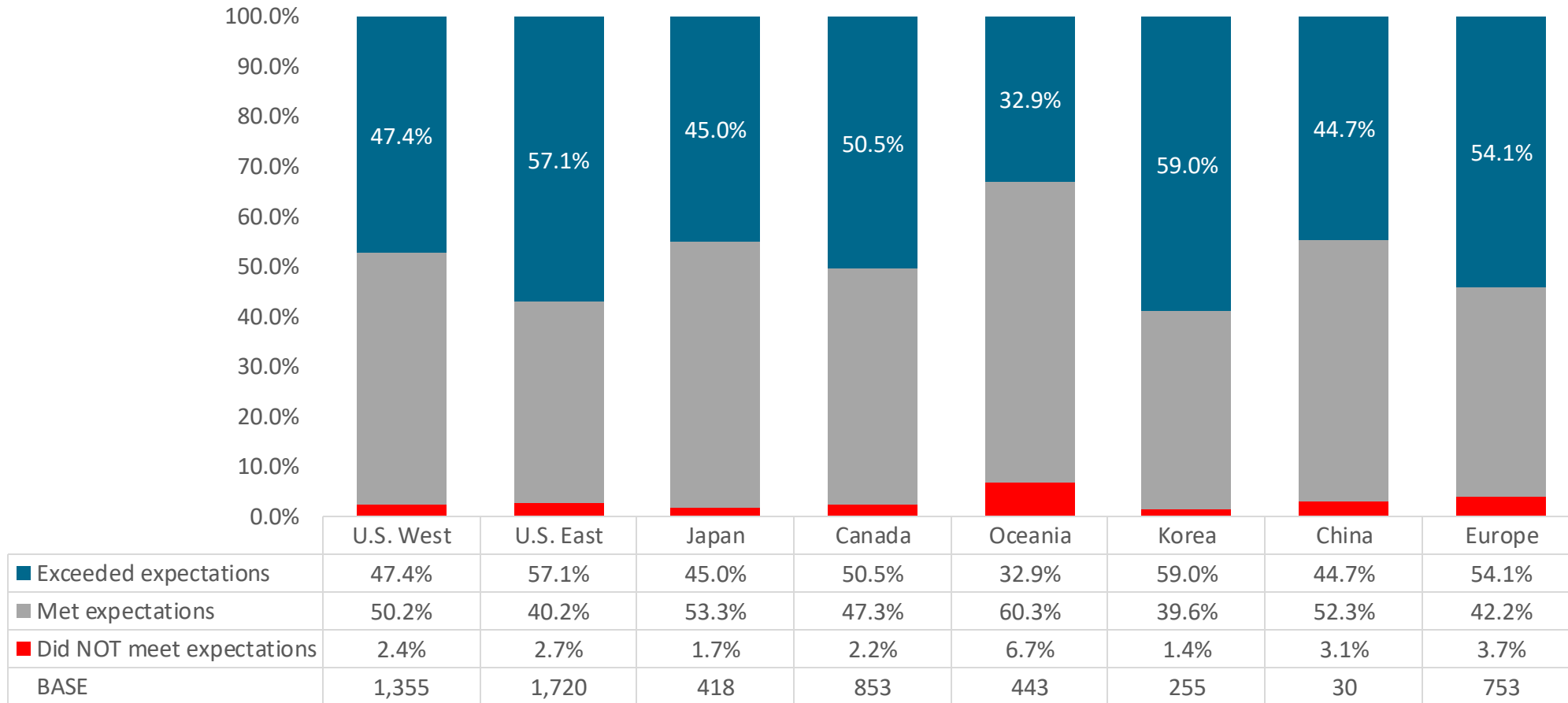
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



SATISFACTION - HAWAI'I TRIP EXPECTATIONS



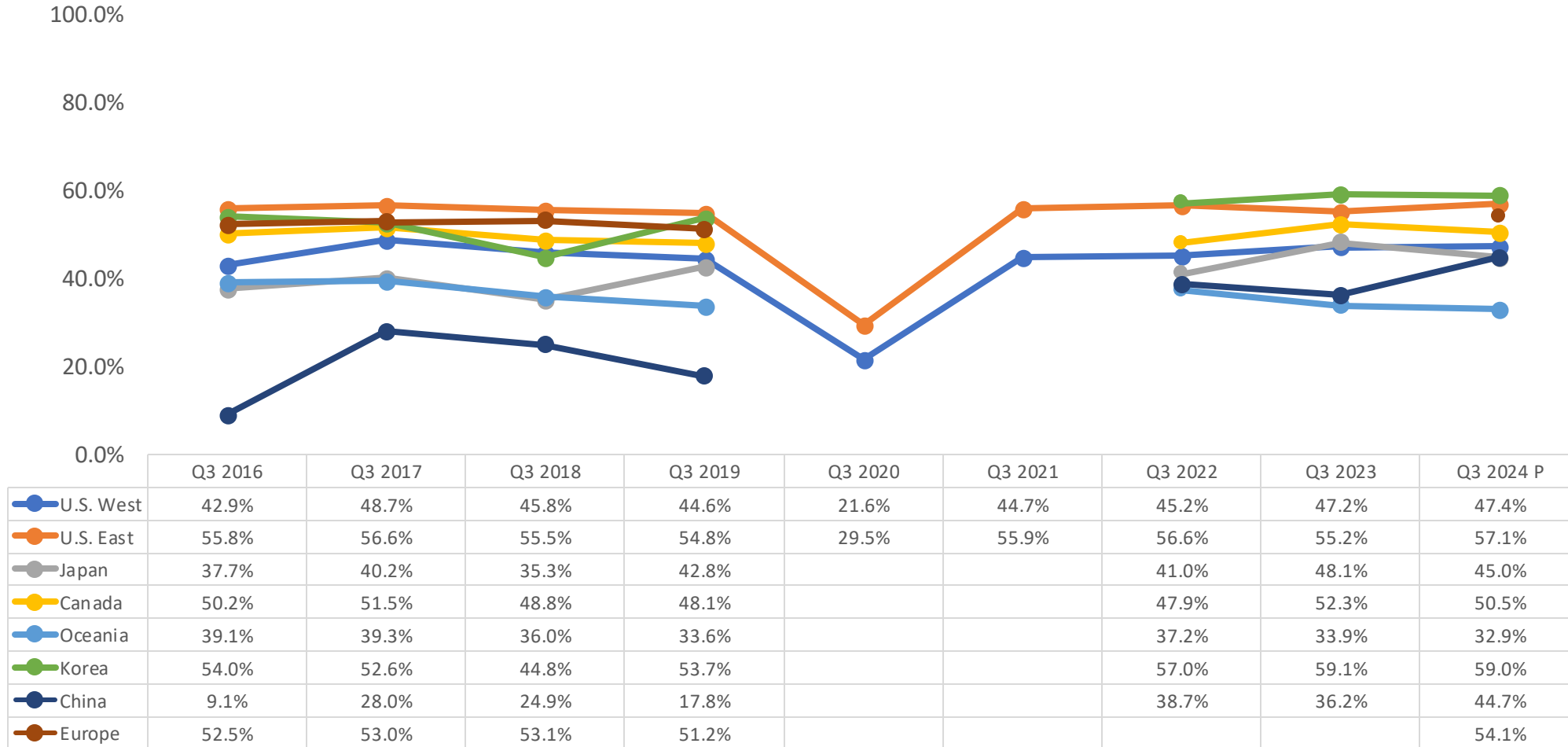
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher scores than repeat visitors: **U.S. East, Oceania, Canada and Japan.**
- ***Age:*** Younger respondents from **U.S. West** (18 – 49 years old), **U.S. East** (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** gave higher mean satisfaction scores compared to male visitors.
- ***Travel party size:*** Visitors from **U.S. West** who traveled to the state by themselves gave higher scores compared to those in larger travel parties.
- ***Islands visited:*** Those visitors from **U.S. West** whose stay included stops on multiple islands gave higher scores compared to those who visited just a single island during their stay.
- ***Household income:*** Less affluent (<\$150K) travelers from **U.S. West** gave higher scores.

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

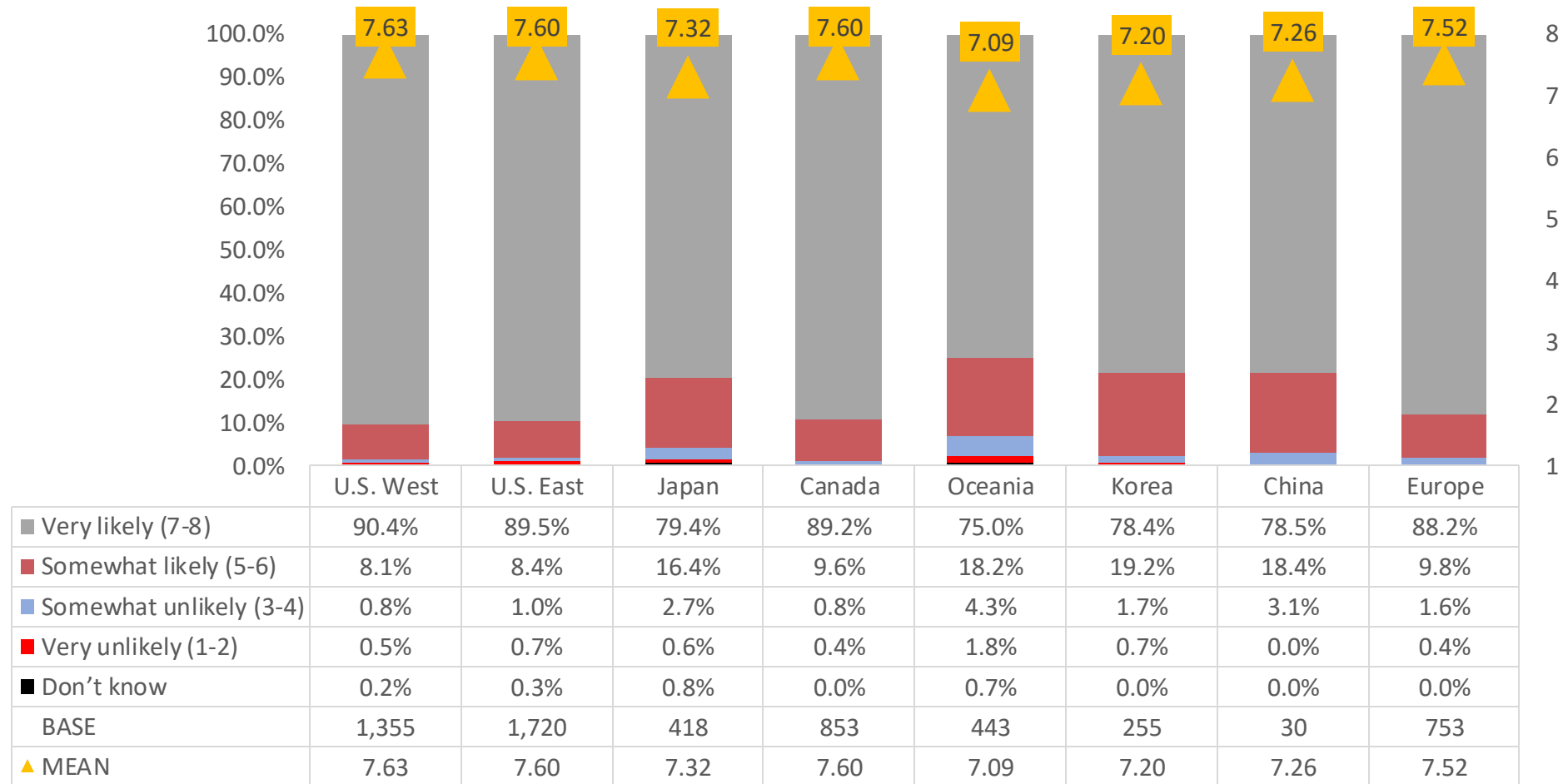
Q. Would you say this trip to Hawai‘i ___?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



BRAND/ DESTINATION - ADVOCACY

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



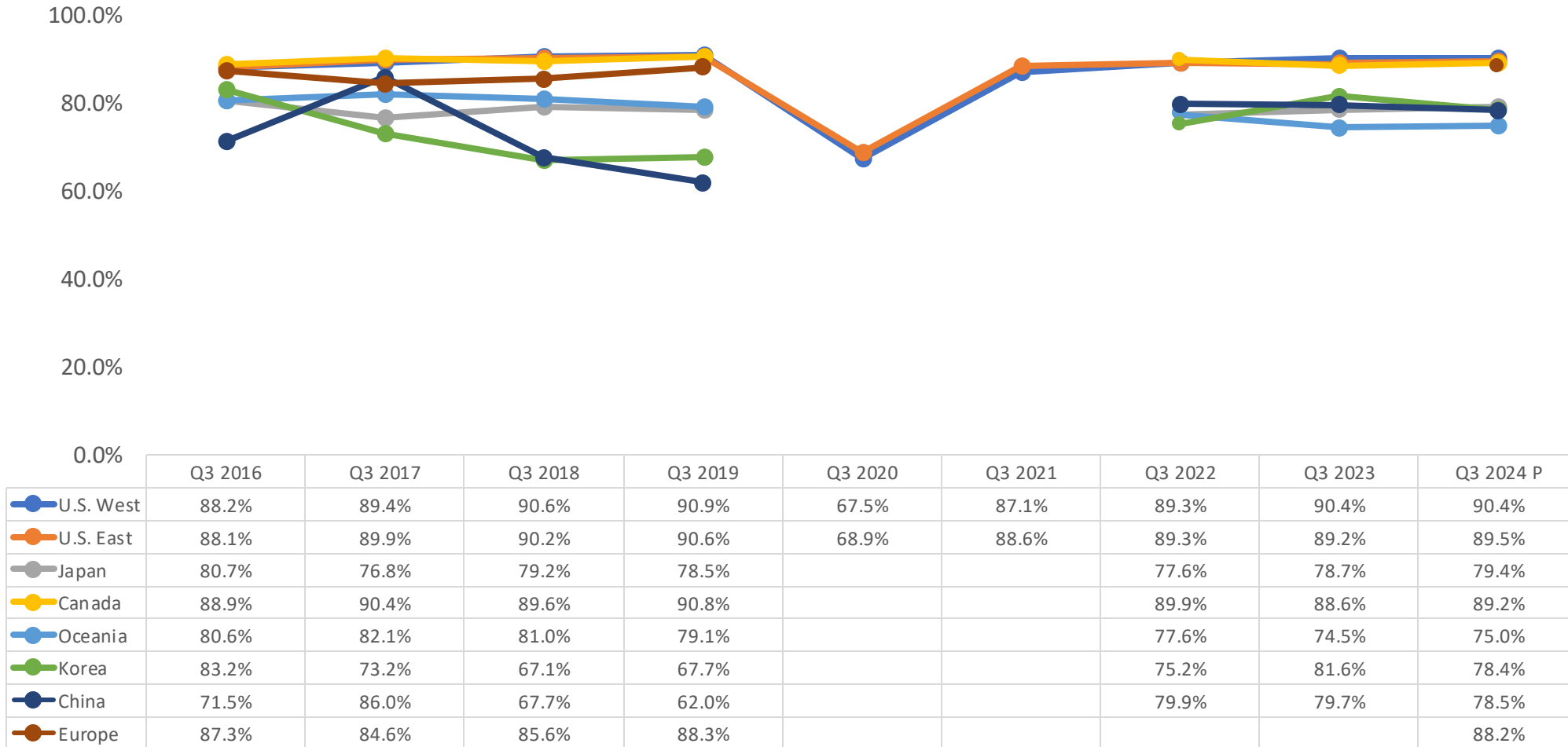
BRAND/ DESTINATION - ADVOCACY

- **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.
- **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:** Younger visitors from **Japan** (18 – 35 years old) were most likely to recommend the state to others.
- **Islands visited:** Visitors from **U.S. East** whose stay included stops on multiple islands were more likely to recommend the state compared to those whose trip included a stop on just a single island.

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

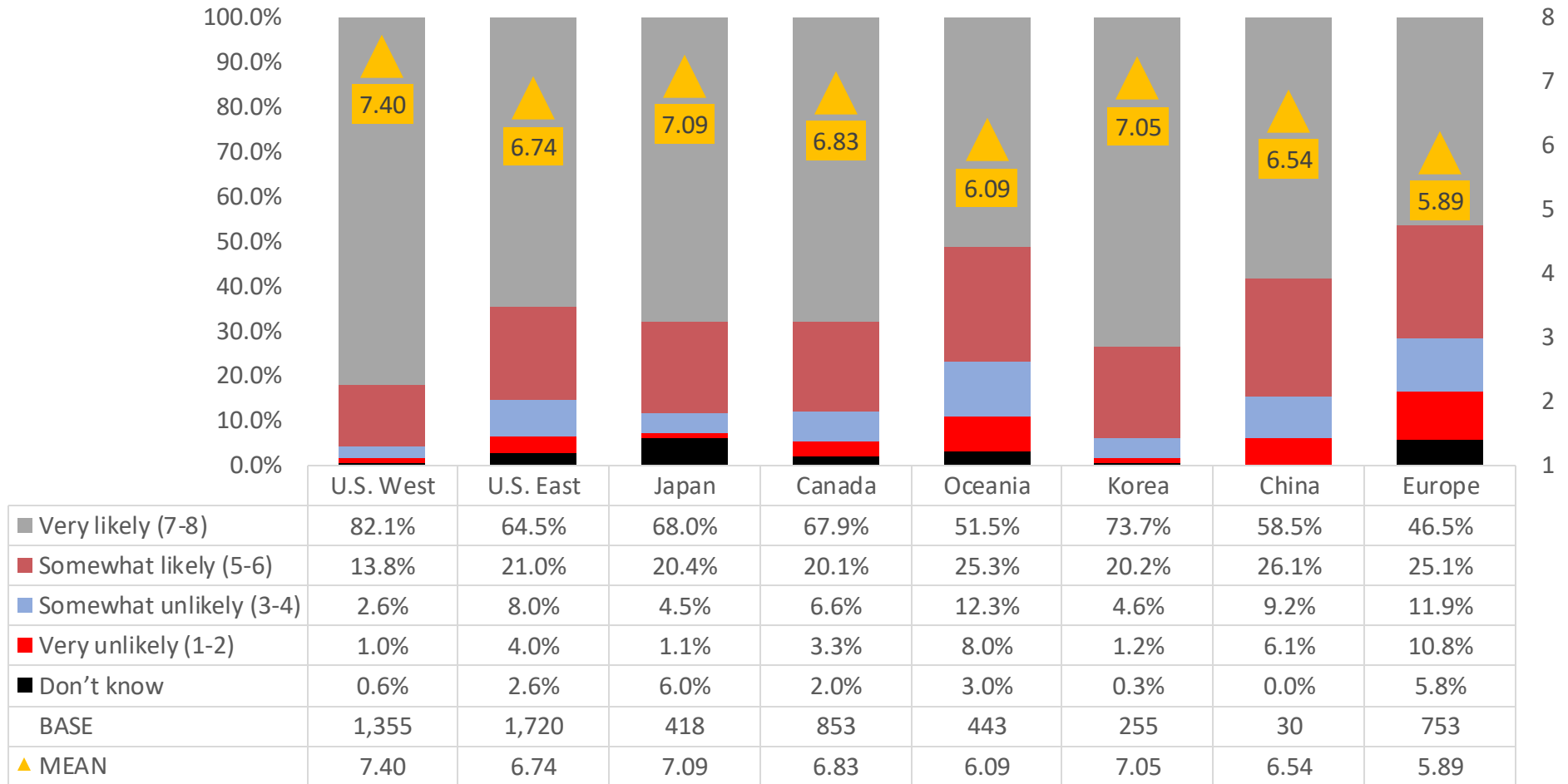
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



LIKELIHOOD OF RETURN VISIT

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

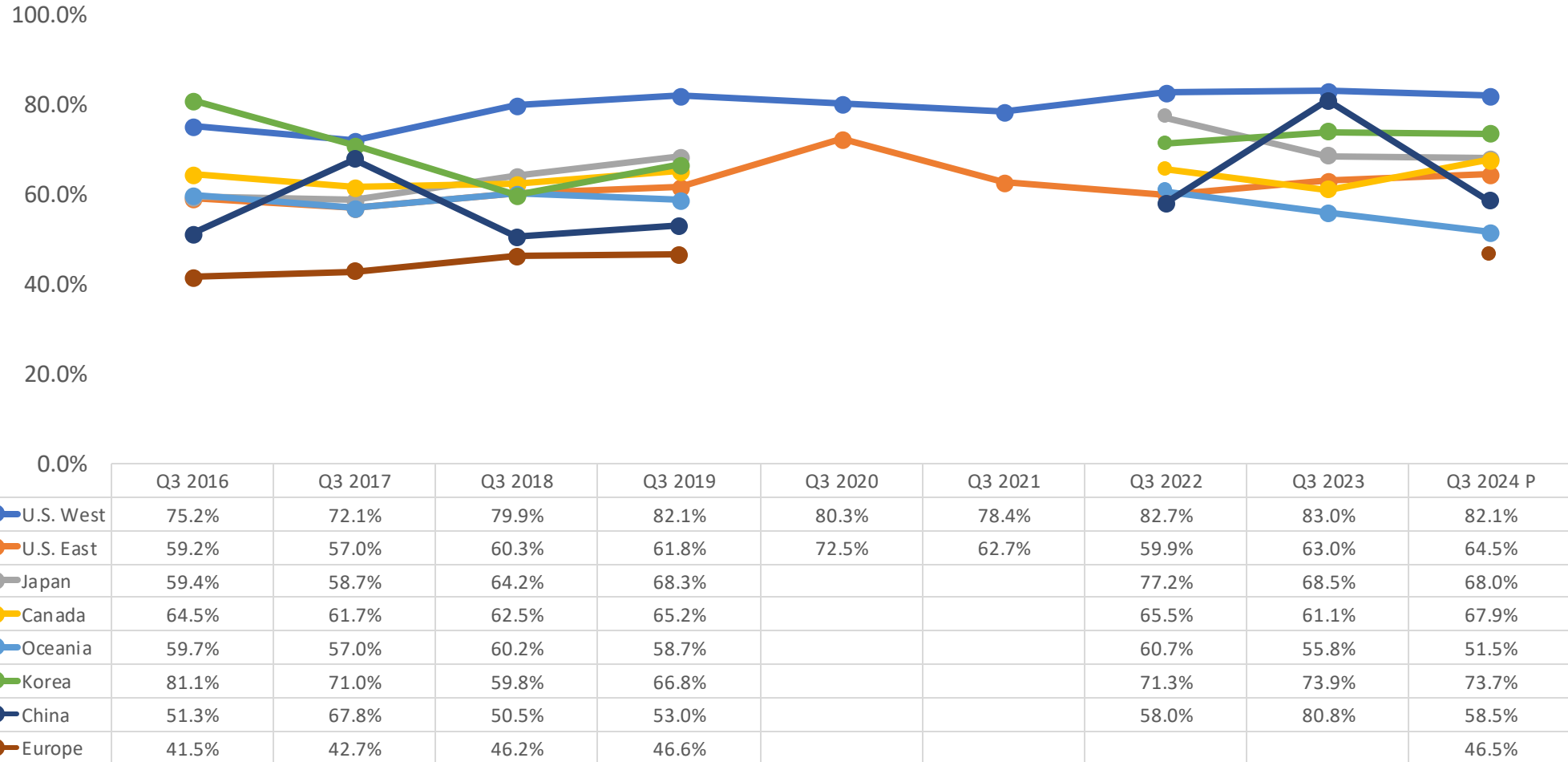


LIKELIHOOD OF RETURN VISIT

- **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. 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 18-34 years old expressed the least likelihood of returning than other age groups from this market. Older visitors from **Japan** (50+ years old) appear more likely to return to the state than younger visitors.
- **Travel party size:** Those from **U.S. East** and **Japan** who traveled to the state by themselves expressed a higher likelihood of return than those who traveled here with at least one other person.
- **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. East** 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?

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q3 2023	Q3 2024 P
58.6% Too expensive	58.9% Too expensive
33.1% Want to go someplace new	41.2% Want to go someplace new
31.3% Poor value	30.3% Too crowded/ congested/ traffic
27.5% Too crowded/ congested/ traffic	28.1% Poor value
21.4% No compelling reason to return	17.9% Too commercialized/ overdeveloped
20.4% Too commercialized/ overdeveloped	17.7% No compelling reason to return
14.5% Unfriendly people/ felt unwelcome	14.7% Unfriendly people/ felt unwelcome
12.1% Poor service	12.3% Five years is too soon
	10.6% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q3 2023	Q3 2024 P
55.2% Too expensive	55.5% Too expensive
49.2% Flight too long	39.7% Flight too long
39.5% Want to go someplace new	39.5% Want to go someplace new
17.4% Five years is too soon	17.6% Five years is too soon
16.3% Poor value	17.3% Poor value
13.5% Other financial obligations	13.1% Other financial obligations
13.2% Too crowded/ congested/ traffic	12.2% Too crowded/ congested/ traffic
11.4% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q3 2023*	Q3 2024 P**
58.7% Too expensive	68.1% Too expensive
34.5% Five years is too soon	31.9% Want to go someplace new
17.2% Want to go someplace new	28.9% Five years is too soon
13.8% Other financial obligations	18.4% Other financial obligations
10.4% Poor health/ age	13.1% Too commercialized/ overdeveloped
10.3% Flight too long	11.7% Poor value

*Caution small base (n=29 respondents) in Q3 2023.

**Caution small base (n=43 respondents) in Q3 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q3 2023	Q3 2024 P
62.3% Too expensive	63.9% Too expensive
42.0% Want to go someplace new	36.6% Want to go someplace new
32.7% Flight too long	28.2% Flight too long
21.4% Five years is too soon	24.0% Five years is too soon
18.8% Poor value	16.0% Poor value
16.9% Other financial obligations	15.3% Other financial obligations
12.4% Too commercialized/ overdeveloped	
12.2% Too crowded/ congested/ traffic	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q3 2023	Q3 2024 P
66.3% Too expensive	57.0% Too expensive
45.7% Poor value	34.2% Poor value
28.0% Want to go someplace new	29.5% Want to go someplace new
24.4% Too commercialized/ overdeveloped	28.2% Too commercialized/ overdeveloped
20.7% Too crowded/ congested/ traffic	25.4% Too crowded/ congested/ traffic
14.1% Flight is too long	18.4% No compelling reason to return
13.8% Five years is too soon	13.6% Five years is too soon
12.8% No compelling reason to return	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q3 2023*	Q3 2024 P**
67.0% Too expensive	72.1% Too expensive
35.4% Five years is too soon	61.1% Poor value
27.7% Poor value	16.6% Flight too long
26.8% Flight too long	13.9% Want to go someplace new
19.2% Other financial obligations	13.9% Other
19.2% Want to go someplace new	11.1% Other financial obligations
13.9% No compelling reason to return	11.1% Unfriendly people/ felt unwelcome
	11.1% Poor service

*Caution small base (n=23 respondents) in Q3 2023.

**Caution small base (n=16 respondents) in Q3 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Q3 2023*	Q3 2024 P**
100.0% Flight too long	40.0% Want to go someplace new
50.0% Want to go someplace new	40.0% Poor value
50.0% Unfriendly people/ felt unwelcome	20.0% Flight too long
50.0% Poor service	20.0% Five years is too soon
50.0% Airport/ immigration issue	20.0% Too crowded/ congested/ traffic
	20.0% No compelling reason to return
	20.0% Unfriendly people/ felt unwelcome
	20.0% Poor service
	20.0% Buildings/ infrastructure old

*Caution small base (n=2 respondents) in Q3 2023.

**Caution small base (n=5 respondents) in Q3 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

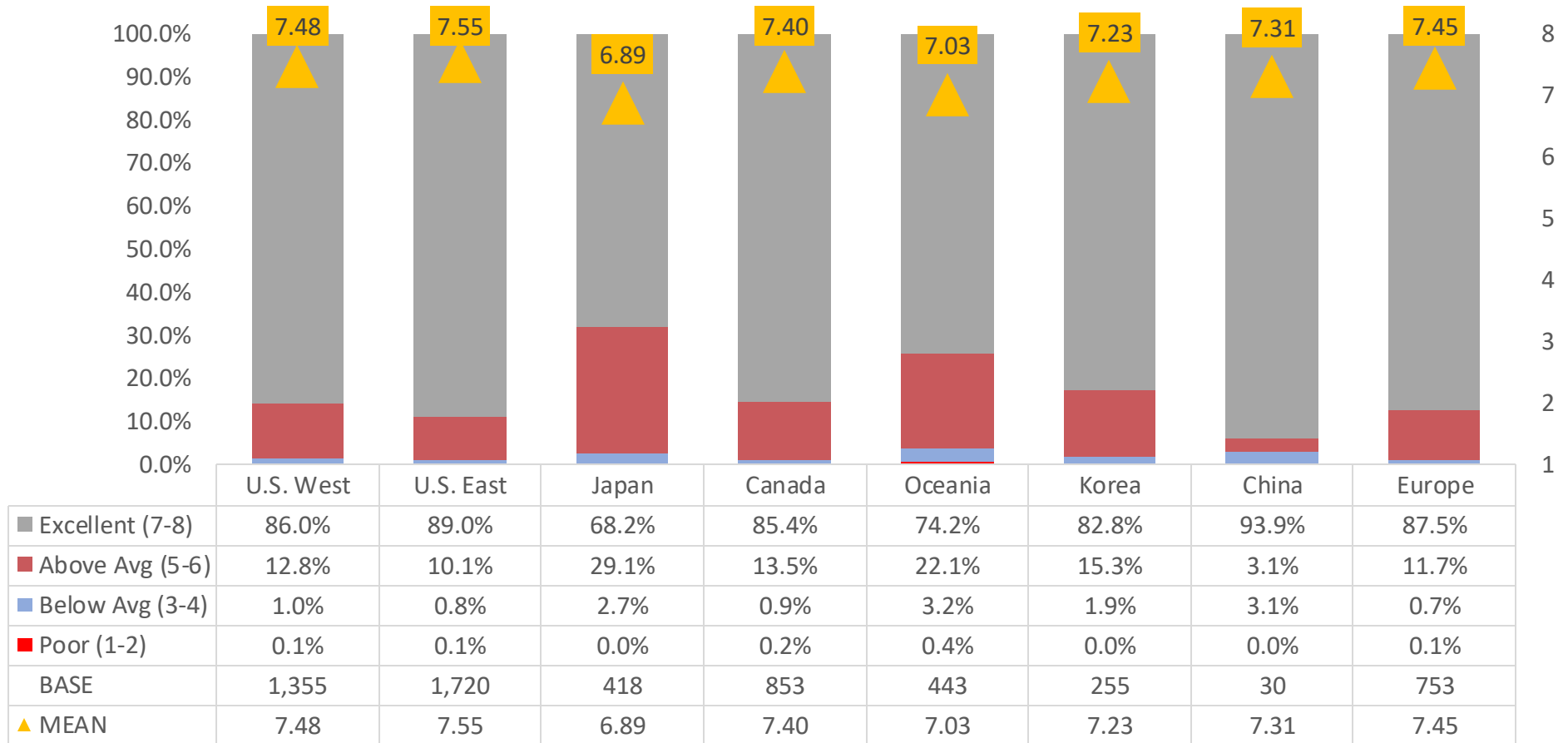
Q3 2019*	Q3 2024 P
62.3% Flight too long	62.4% Flight too long
53.0% Too expensive	57.1% Too expensive
38.3% Want to go someplace new	40.3% Want to go someplace new
29.7% Five years is too soon	26.9% Five years is too soon
10.5% Too commercialized/ overdeveloped	12.7% Too commercialized/ overdeveloped
	12.3% Poor value
	10.8% Other financial obligations

*No data collected from 2020 thru 2023.

P= Preliminary Data

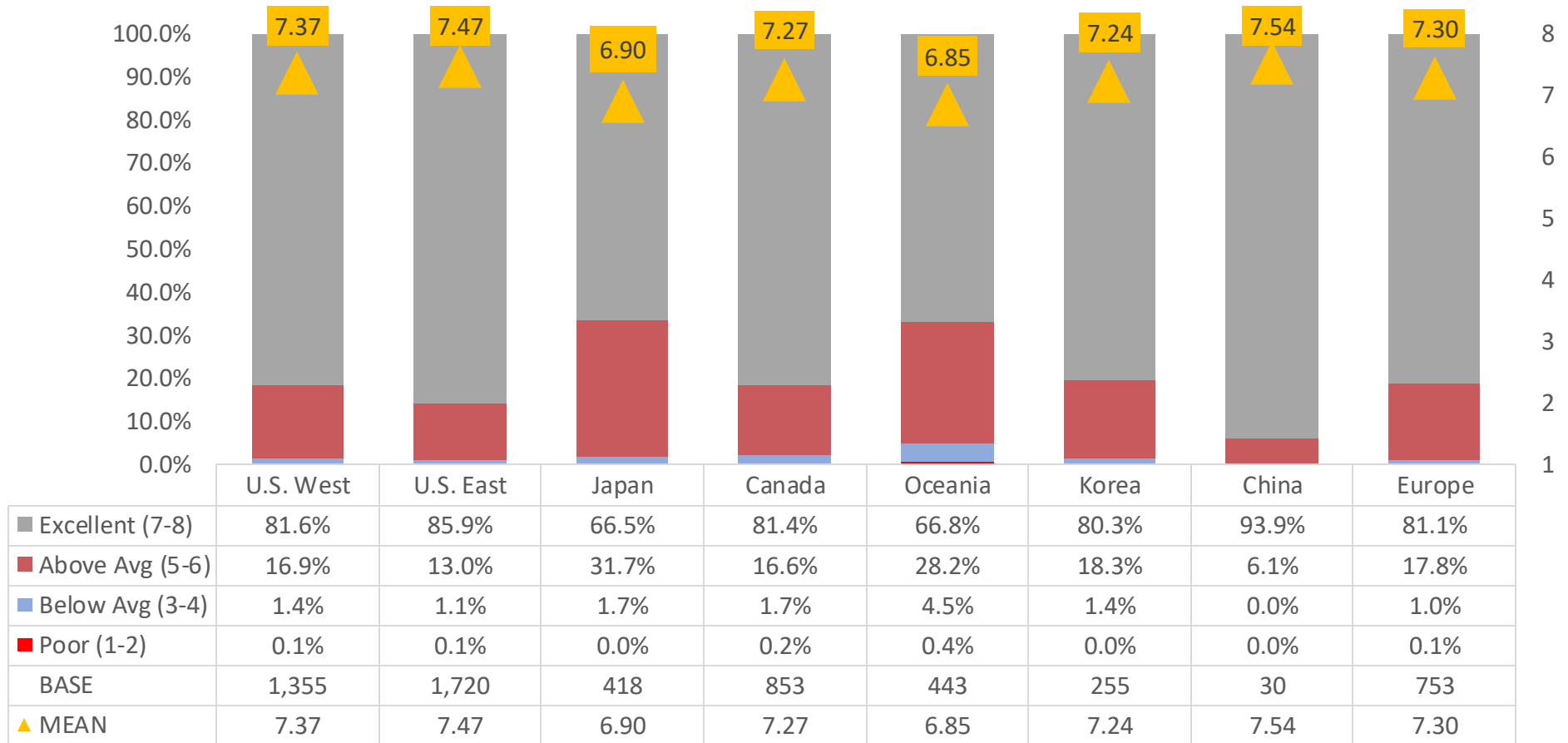
OFFERING A VARIETY OF EXPERIENCES

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



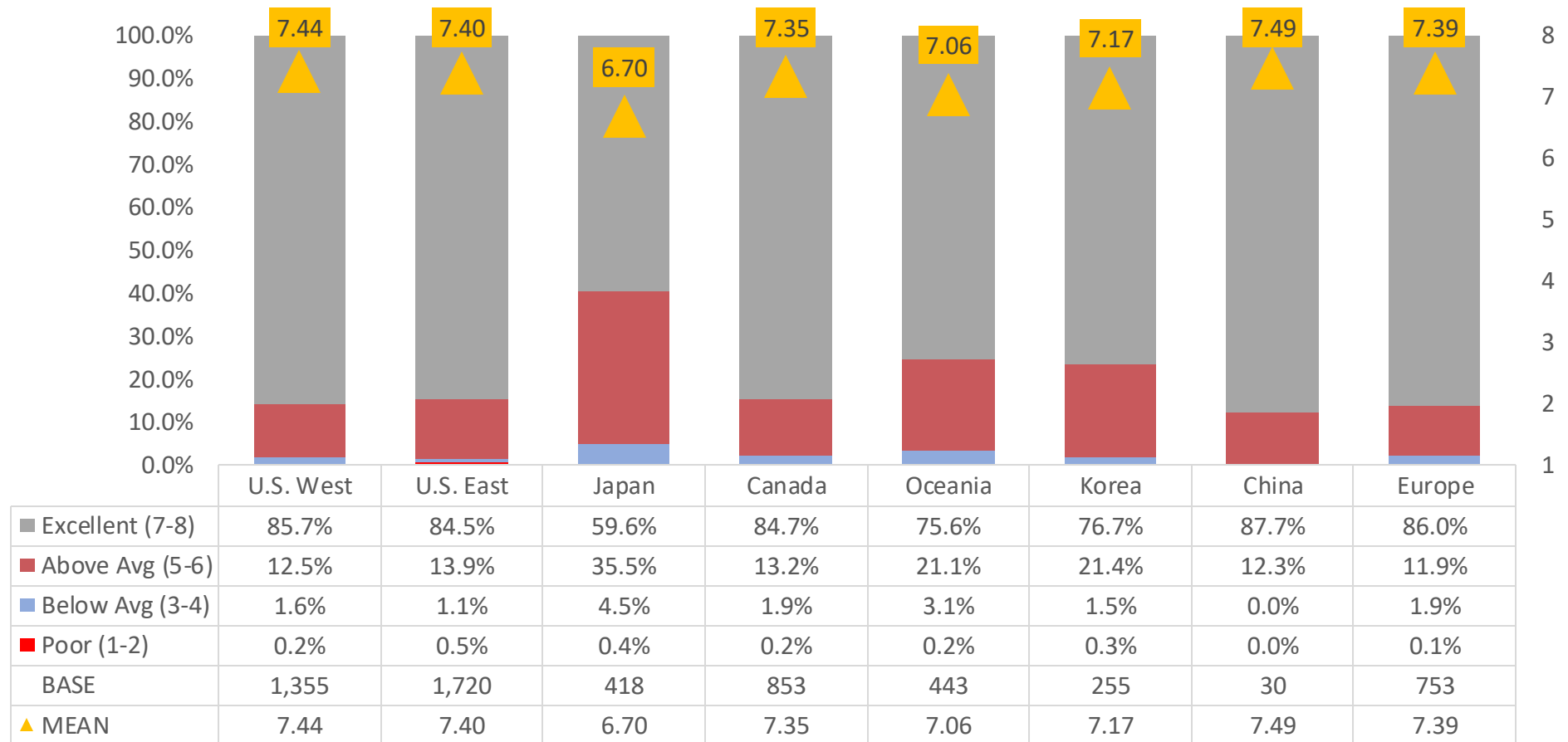
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



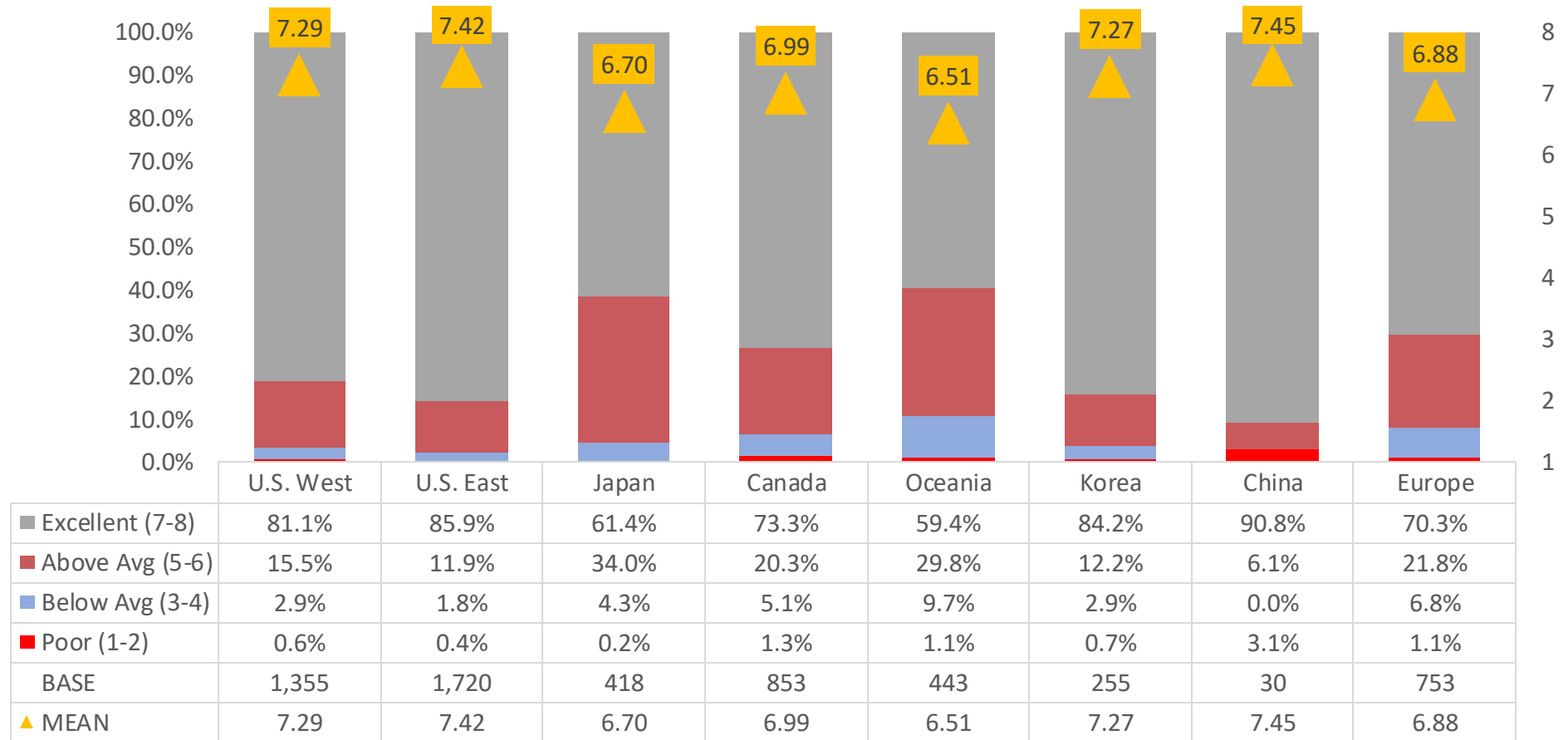
SAFE AND SECURE DESTINATION

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



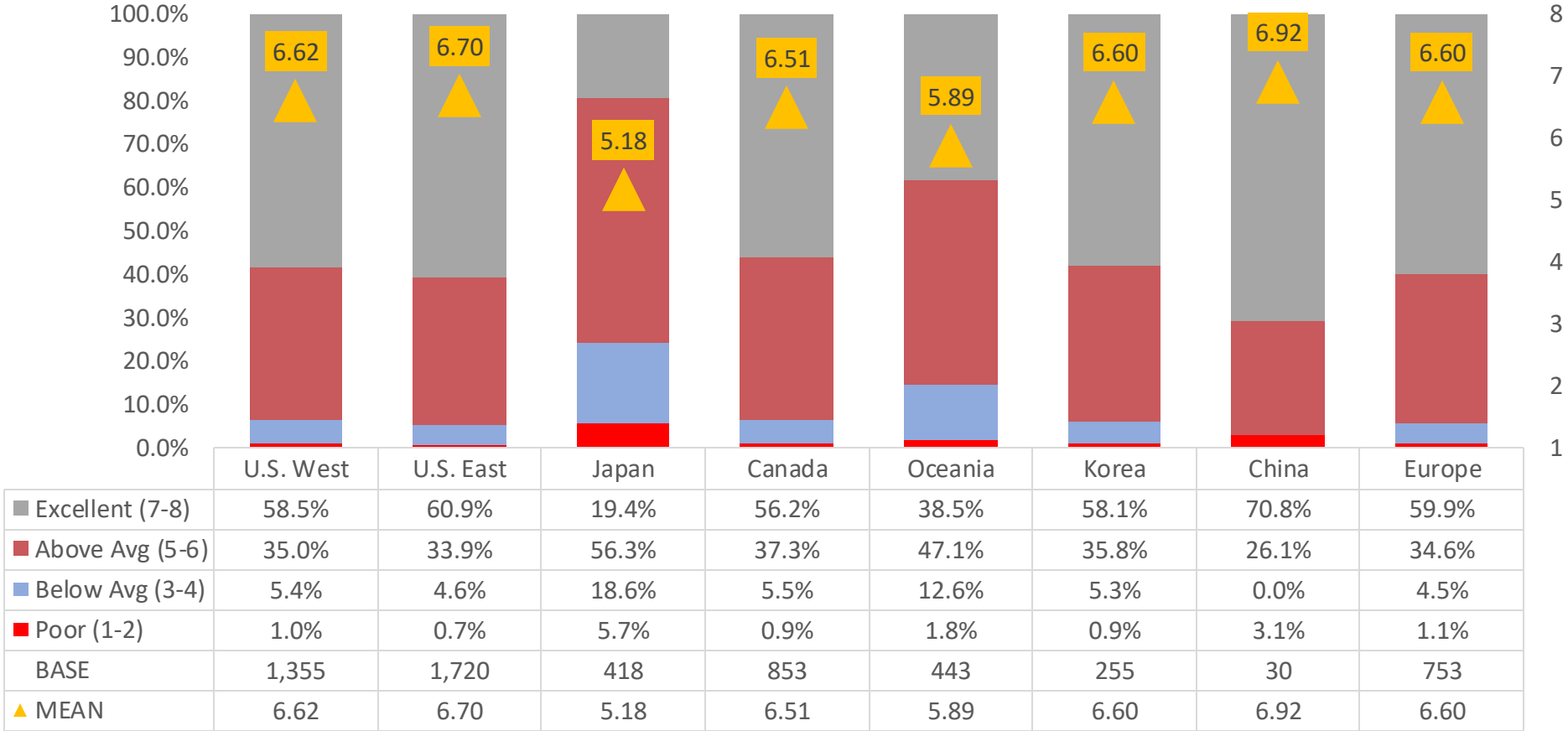
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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
TOTAL	97.5%	99.2%	97.8%	98.4%	90.7%	99.7%	100.0%	98.5%
On own (self-guided)/ driving around island	84.8%	82.5%	76.4%	85.8%	43.4%	82.8%	77.6%	77.7%
Helicopter ride/ airplane tour	2.2%	5.8%	0.4%	3.4%	2.7%	5.0%	6.9%	14.0%
Boat tour/ submarine ride/ whale watching	26.7%	30.0%	7.3%	22.0%	19.8%	28.7%	38.0%	24.1%
Visit towns/ communities	55.6%	56.7%	38.2%	55.0%	23.9%	34.2%	20.6%	47.8%
Private limousine/ van tour/ tour bus	7.0%	14.7%	13.3%	9.0%	30.7%	10.4%	15.5%	15.0%
Scenic views/ natural landmarks	60.3%	70.7%	23.2%	67.2%	51.8%	62.7%	68.9%	66.9%
Movie/ TV/ film location tours	5.3%	8.2%	4.1%	8.2%	8.8%	22.7%	19.0%	12.2%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.9%	96.4%	97.4%	97.8%	91.5%	98.8%	100.0%	96.9%
Beach/ sunbathing	88.0%	85.7%	79.8%	88.1%	75.8%	86.8%	87.9%	87.4%
Bodyboarding	9.4%	6.2%	1.8%	12.3%	4.4%	5.3%	3.4%	7.3%
Standup paddle boarding	4.2%	4.1%	3.3%	3.2%	2.7%	3.8%	0.0%	3.3%
Surfing	6.0%	6.9%	2.9%	8.9%	7.8%	11.6%	13.8%	15.6%
Canoe paddling	1.7%	1.6%	0.7%	4.4%	0.7%	3.9%	0.0%	1.7%
Kayaking	4.9%	5.3%	1.9%	4.9%	1.2%	4.3%	6.9%	4.0%
Swimming in the ocean	68.6%	67.6%	46.9%	74.0%	64.3%	54.7%	51.7%	72.1%
Snorkeling	46.5%	43.9%	17.4%	51.4%	23.7%	52.8%	39.6%	47.2%
Freediving	2.0%	1.2%	0.0%	1.0%	1.5%	2.1%	6.9%	2.3%
Windsurfing/ Kitesurfing	0.5%	0.1%	0.0%	0.1%	0.0%	1.7%	0.0%	0.8%
Jet skiing/ Parasailing	2.2%	1.6%	1.9%	1.4%	1.2%	3.1%	0.0%	1.0%
Scuba diving	2.3%	1.8%	1.1%	2.5%	0.8%	0.9%	0.0%	2.7%
Fishing	2.0%	3.2%	0.8%	1.5%	1.0%	1.9%	13.9%	0.8%
Golf	6.1%	5.4%	5.3%	5.3%	3.1%	9.1%	0.0%	2.2%
Running/ jogging/ fitness/ walking	27.4%	26.1%	25.6%	29.5%	20.8%	20.7%	10.3%	18.9%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.9%	96.4%	97.4%	97.8%	91.5%	98.8%	100.0%	96.9%
Cycling	2.6%	2.5%	4.5%	2.6%	2.4%	3.3%	3.4%	3.1%
Spa	7.9%	8.1%	5.6%	4.1%	3.9%	4.8%	3.4%	4.5%
Hiking	40.6%	48.2%	22.5%	48.5%	17.4%	22.9%	61.9%	46.2%
Backpacking/ camping	1.3%	1.9%	0.0%	1.0%	0.5%	3.1%	3.4%	2.2%
Agritourism	13.1%	14.3%	11.7%	11.9%	5.0%	21.7%	22.4%	8.9%
Sports event or tournament	1.6%	1.1%	0.7%	3.9%	0.7%	0.3%	0.0%	1.8%
Parks/ botanical gardens	34.2%	43.1%	23.0%	40.6%	25.2%	25.6%	39.6%	41.1%
Waterparks	1.9%	1.5%	3.6%	2.4%	0.5%	3.2%	5.2%	0.4%
Mountain tubing/ waterfall rappel	3.2%	3.1%	0.0%	2.4%	0.5%	1.2%	3.4%	4.8%
Zip-lining	5.9%	5.3%	0.4%	2.5%	1.2%	1.2%	3.4%	2.0%
Skydiving	0.3%	0.2%	0.9%	0.5%	0.0%	2.4%	6.9%	0.3%
All-terrain vehicle (ATV)	3.7%	5.1%	1.8%	3.8%	2.2%	5.8%	0.0%	3.8%
Horseback riding	0.8%	1.5%	2.1%	1.0%	1.2%	0.0%	6.9%	2.0%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	97.7%	97.2%	98.8%	97.7%	97.1%	99.7%	96.6%	97.7%
Lunch/ sunset/ dinner/ evening cruise	23.1%	26.5%	13.7%	23.0%	14.8%	36.4%	55.2%	27.7%
Live music/ stage show	28.7%	37.2%	19.0%	30.5%	23.6%	18.1%	10.3%	27.2%
Nightclub/ dancing/ bar/ karaoke	6.4%	6.9%	2.3%	6.2%	4.9%	2.2%	3.4%	4.7%
Fine dining	43.6%	44.8%	36.3%	39.2%	31.5%	43.8%	39.6%	27.1%
Family restaurant	64.5%	58.6%	25.9%	63.3%	60.6%	42.6%	38.0%	47.4%
Fast food	33.9%	34.5%	53.2%	43.9%	47.6%	54.0%	62.0%	46.9%
Food truck	47.7%	45.2%	28.4%	50.0%	34.5%	64.8%	36.2%	49.3%
Café/ coffee house	54.7%	50.9%	58.2%	59.1%	57.6%	63.1%	37.8%	51.9%
Ethnic dining	28.3%	30.5%	9.1%	24.9%	11.5%	26.7%	20.6%	14.8%
Farm-to-table cuisine	17.9%	19.0%	16.8%	14.0%	3.4%	2.4%	5.2%	8.4%
Prepared own meal	45.7%	38.5%	35.9%	52.4%	25.7%	19.0%	17.2%	38.6%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.0%	95.4%	97.9%	96.1%	94.4%	98.8%	93.1%	95.3%
Malls/ department stores	44.4%	43.3%	82.2%	59.6%	69.7%	79.2%	63.8%	59.1%
Designer boutiques	16.4%	19.7%	16.4%	18.6%	14.7%	4.8%	19.0%	10.6%
Hotel/ resort stores	36.7%	40.5%	36.8%	31.6%	30.7%	32.8%	24.1%	26.6%
Swap meet/ flea market	17.7%	16.1%	2.6%	16.8%	7.5%	4.3%	6.9%	5.7%
Discount/ outlet stores	11.7%	14.3%	24.1%	15.0%	34.7%	56.7%	15.5%	13.4%
Supermarkets	62.7%	52.9%	59.7%	64.1%	42.9%	43.8%	53.4%	65.4%
Farmer's market	37.3%	33.5%	21.9%	39.6%	16.6%	12.3%	20.6%	36.9%
Convenience stores	52.4%	53.4%	56.3%	54.2%	66.8%	54.7%	39.6%	37.8%
Duty free stores	5.3%	5.3%	17.3%	7.7%	12.7%	32.0%	38.0%	8.4%
Hawai'i-made products	46.4%	50.2%	22.6%	47.9%	33.2%	28.5%	39.6%	43.8%
Local shops and artisans	55.9%	59.9%	14.8%	56.5%	40.7%	21.7%	41.4%	45.7%
Local fashion designers	8.6%	8.8%	2.8%	11.4%	9.3%	1.7%	6.9%	10.9%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	66.8%	79.5%	56.7%	70.9%	73.2%	71.4%	72.5%	73.8%
Historic military sites and museums	17.7%	30.1%	10.6%	18.4%	43.5%	25.1%	38.0%	36.1%
Historic Hawaiian sites and museums	29.8%	37.4%	17.7%	31.8%	26.9%	14.7%	20.8%	32.8%
Other historical sites, museums, and homes	14.2%	16.0%	5.3%	11.6%	12.7%	22.9%	15.5%	15.2%
Art museums	2.8%	2.4%	2.4%	3.0%	2.0%	7.2%	8.7%	2.5%
Art galleries and exhibitions	7.1%	8.0%	4.8%	6.6%	4.9%	2.6%	0.0%	4.9%
Lū'au/ Polynesian show/ hula show	28.8%	42.0%	18.2%	31.4%	23.7%	26.7%	12.1%	29.9%
Lesson- ex. ukulele, hula, canoe, lei making	5.3%	6.3%	7.3%	6.4%	4.9%	6.7%	3.4%	5.5%
Play/ concert/ theatre	2.5%	2.5%	2.8%	1.3%	1.9%	1.5%	0.0%	2.4%
Art/ craft fair	10.2%	11.5%	4.5%	10.2%	6.3%	4.1%	6.9%	3.4%
Festival /event	5.3%	5.4%	3.3%	7.3%	5.6%	3.3%	0.0%	4.2%

ACTIVITIES - TRANSPORTATION

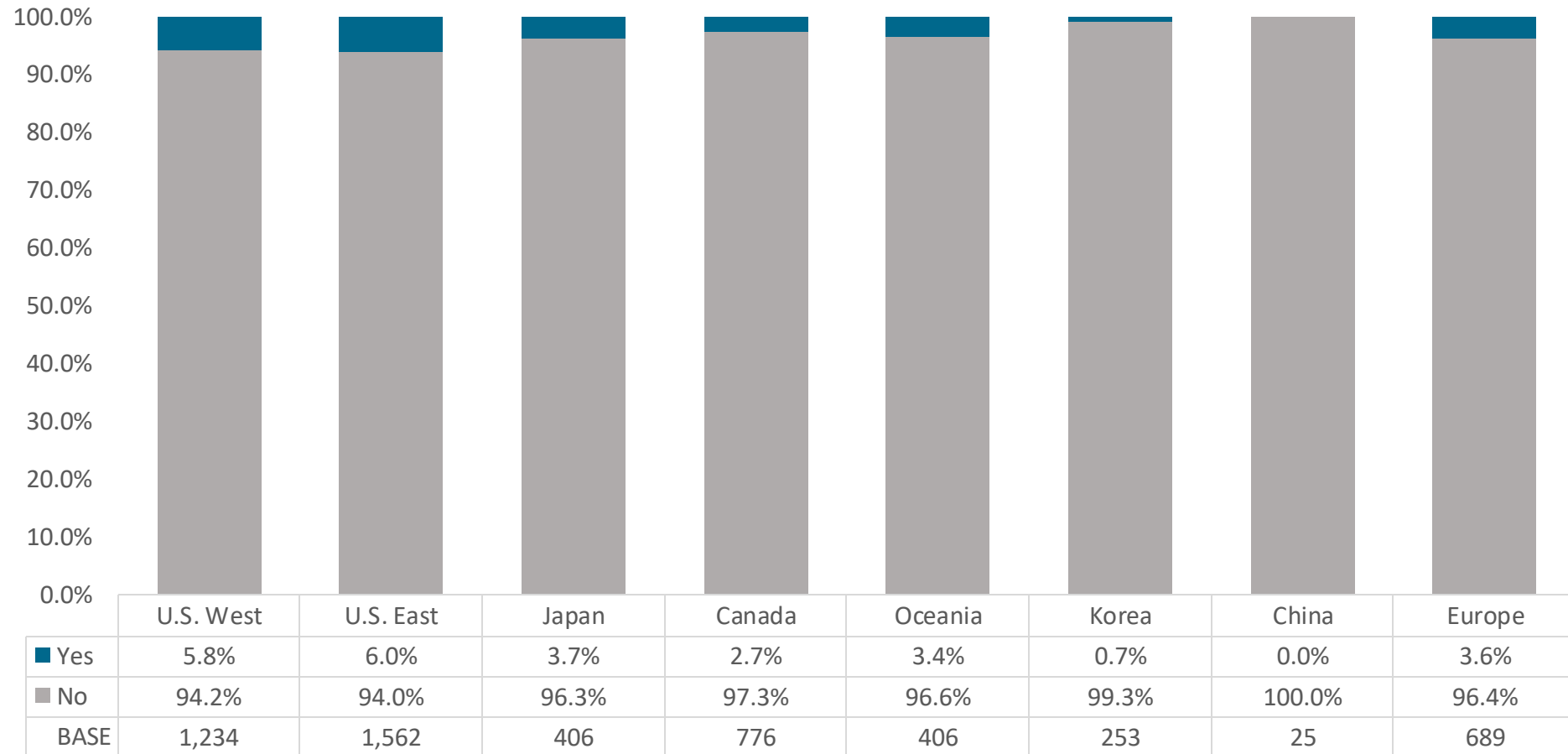
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	93.0%	91.2%	97.4%	94.4%	94.4%	98.5%	93.1%	96.1%
Airport shuttle	12.9%	13.6%	21.0%	12.3%	25.7%	8.2%	25.9%	15.0%
Trolley	1.8%	2.5%	45.4%	3.2%	15.5%	22.4%	3.4%	3.2%
Public bus	4.0%	4.9%	25.6%	8.4%	26.3%	12.3%	13.8%	16.1%
Tour bus/ tour van	7.7%	14.6%	18.7%	9.9%	31.0%	26.0%	5.2%	14.3%
Taxi/ limo	4.8%	7.5%	30.2%	9.3%	32.5%	22.9%	3.4%	17.7%
Rental car	74.4%	68.7%	30.4%	71.8%	24.0%	57.3%	60.4%	65.4%
Ride share	20.6%	21.9%	25.2%	22.8%	44.6%	27.2%	43.1%	23.8%
Car share (i.e.,Hui, Turo)	5.4%	4.4%	1.6%	5.5%	2.7%	5.0%	6.9%	2.7%
Bicycle rental	1.6%	1.7%	4.2%	2.0%	1.9%	1.4%	0.0%	2.2%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	27.8%	28.2%	18.1%	21.3%	12.5%	26.5%	5.2%	12.8%
Visit friends/ family	26.7%	26.7%	16.6%	19.7%	11.3%	24.1%	5.2%	10.4%
Volunteering/ Giving back to the local community	2.0%	2.3%	1.5%	2.5%	1.2%	2.9%	0.0%	2.7%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

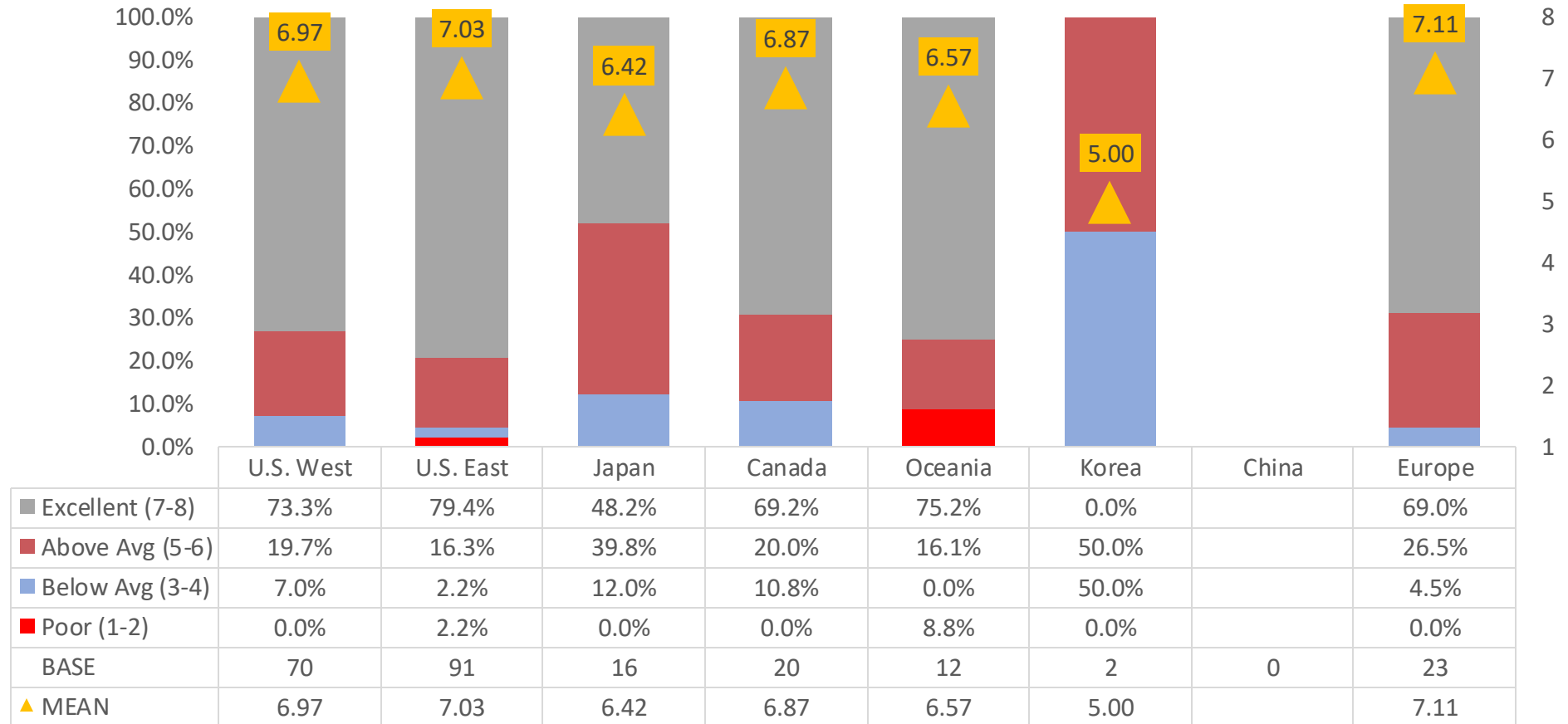


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Mobility aid	72.1%	70.1%	24.1%	66.5%	45.9%	0.0%	0.0%	52.5%
Personal assistance	40.3%	14.8%	6.0%	28.4%	46.6%	0.0%	0.0%	15.2%
Other	8.3%	8.8%	0.0%	9.8%	8.1%	0.0%	0.0%	3.8%
NA- No one needed assistance	1.4%	5.4%	39.8%	9.8%	7.4%	50.0%	0.0%	24.4%
Orientation and Mobility Assistance	1.4%	4.0%	18.1%	0.0%	0.0%	0.0%	0.0%	7.9%
Lift equipped van	0.0%	4.4%	12.0%	0.0%	0.0%	0.0%	0.0%	4.1%
Ambulance/ Hospital/ Medical visit	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	0.0%	1.0%	0.0%	0.0%	0.0%	50.0%	0.0%	3.8%
Service/ assistance animal	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	72	94	16	21	13	2	0	25

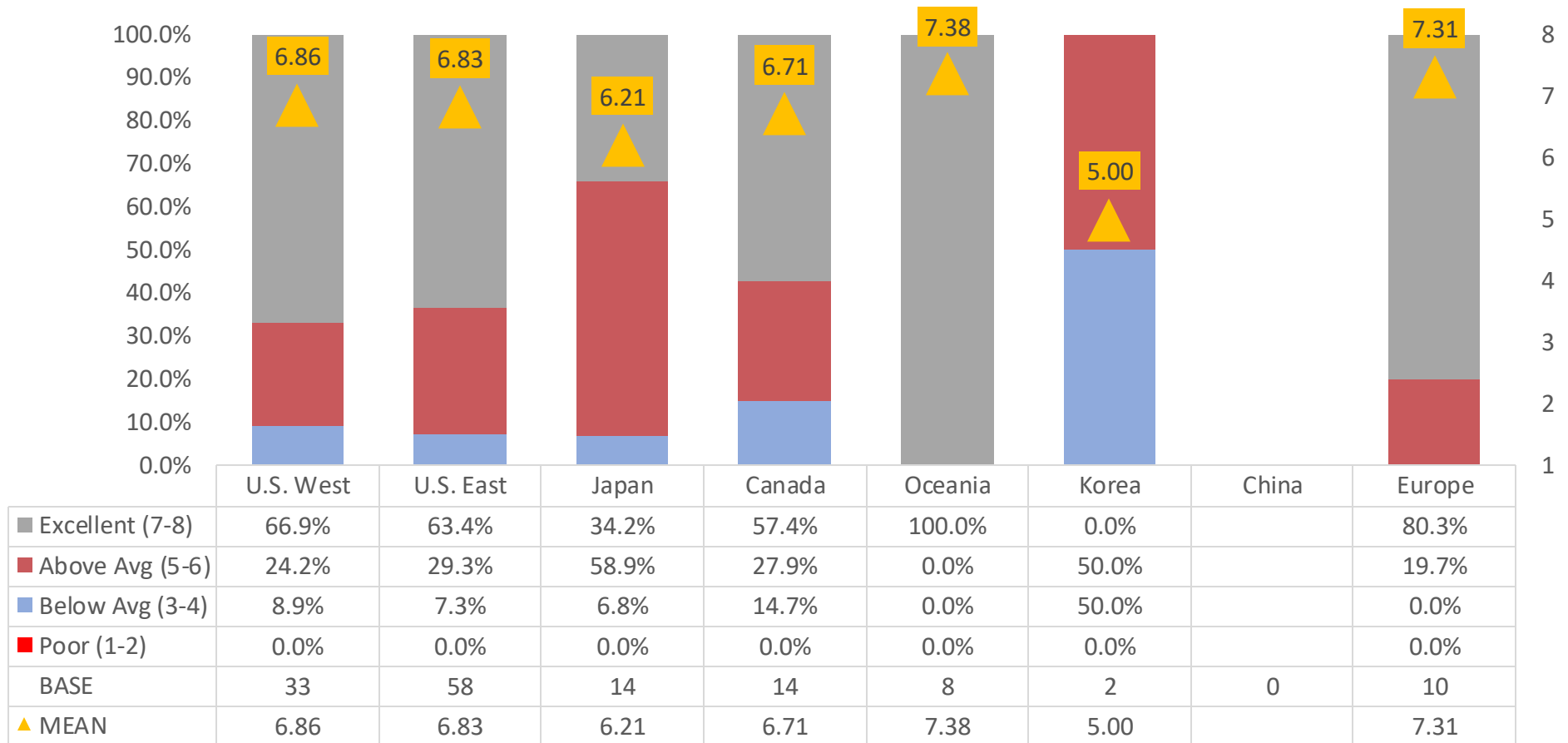
OVERALL ACCESSIBILITY - AIRPORTS

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



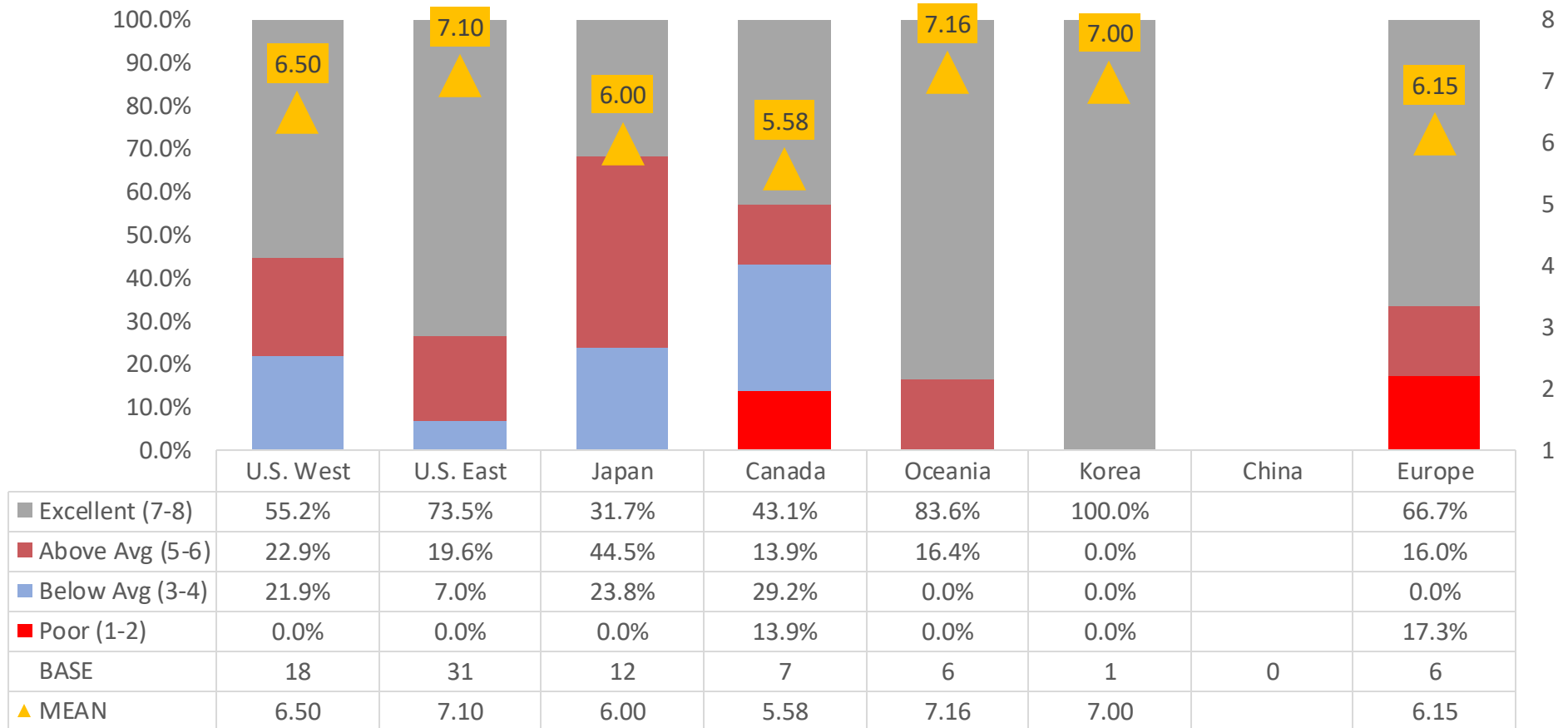
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



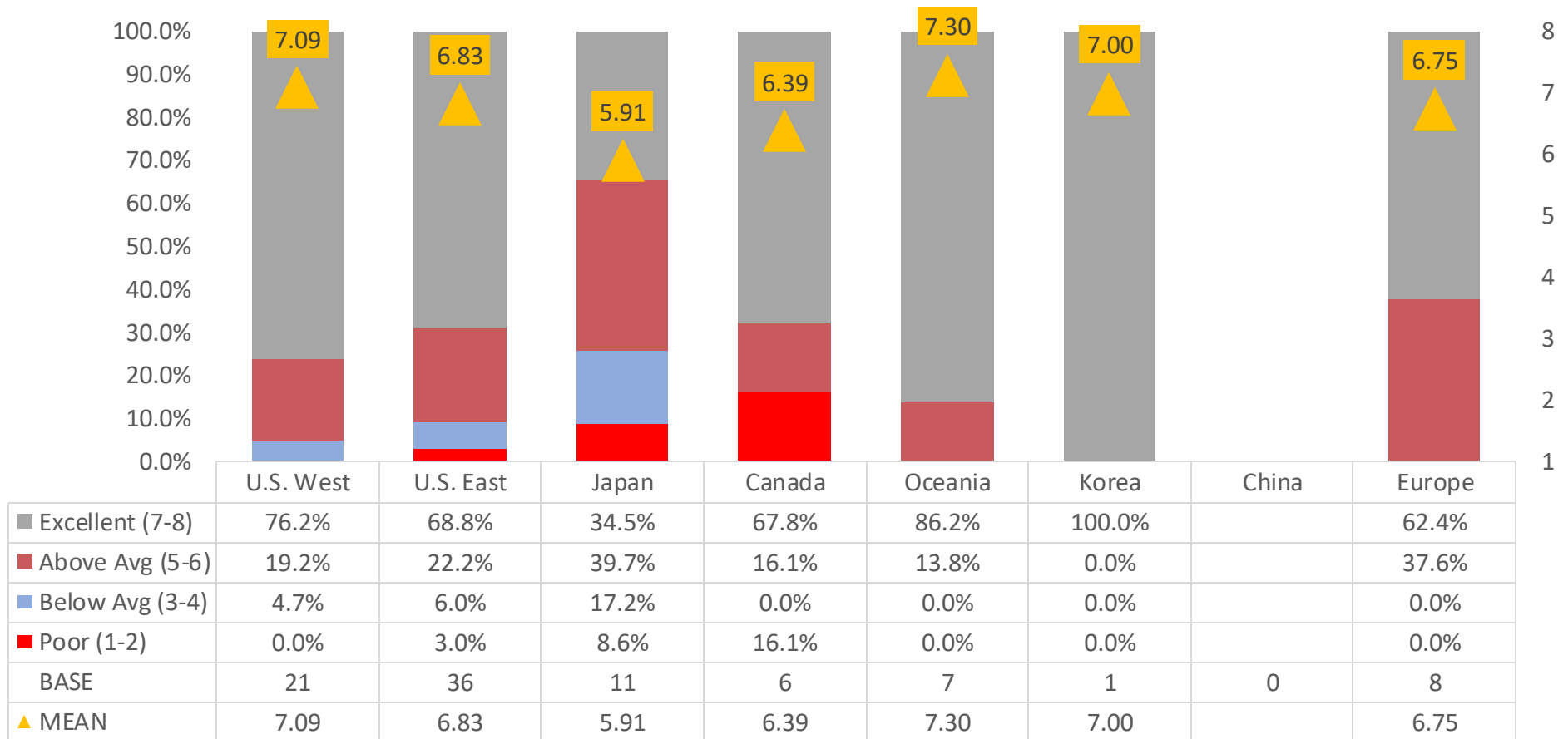
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



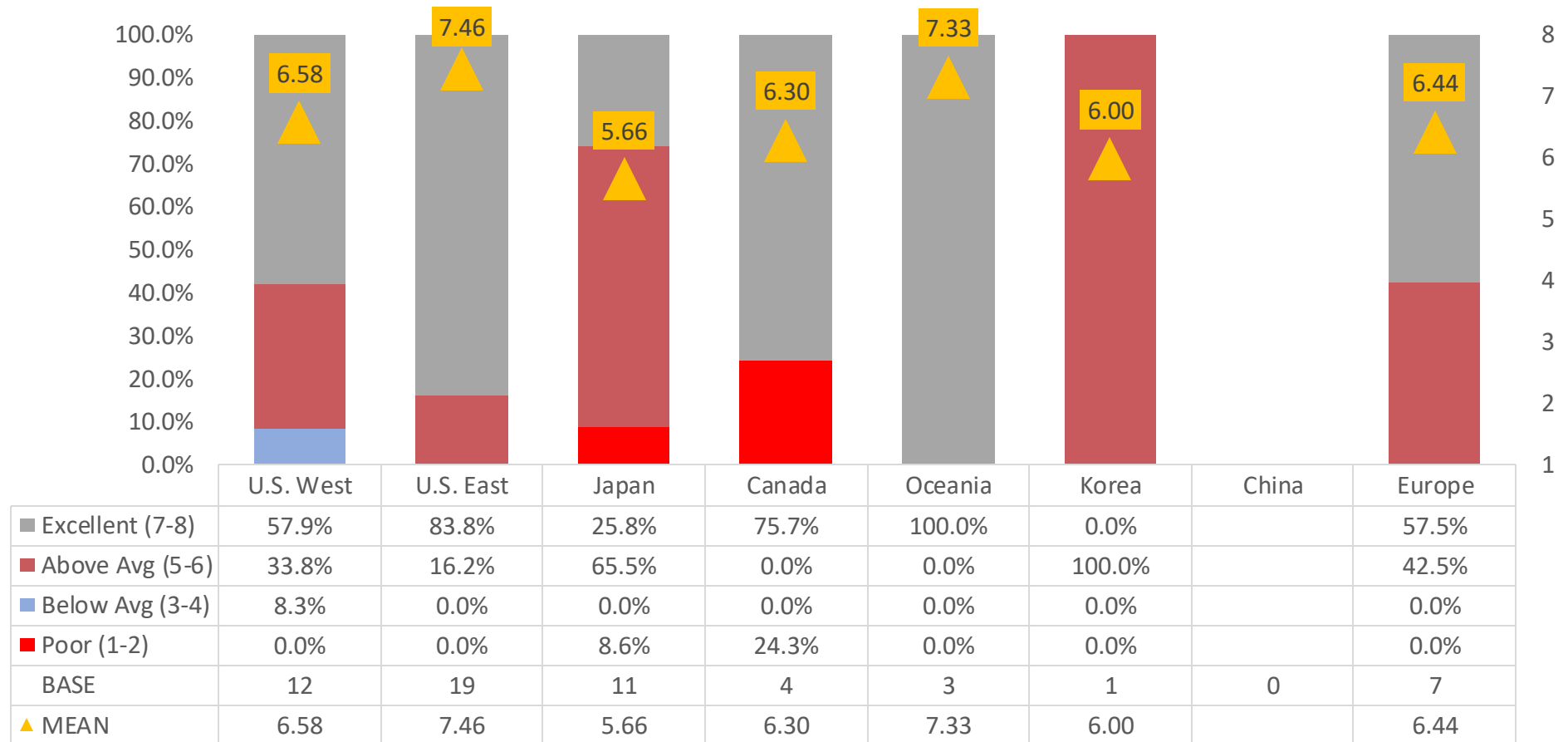
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



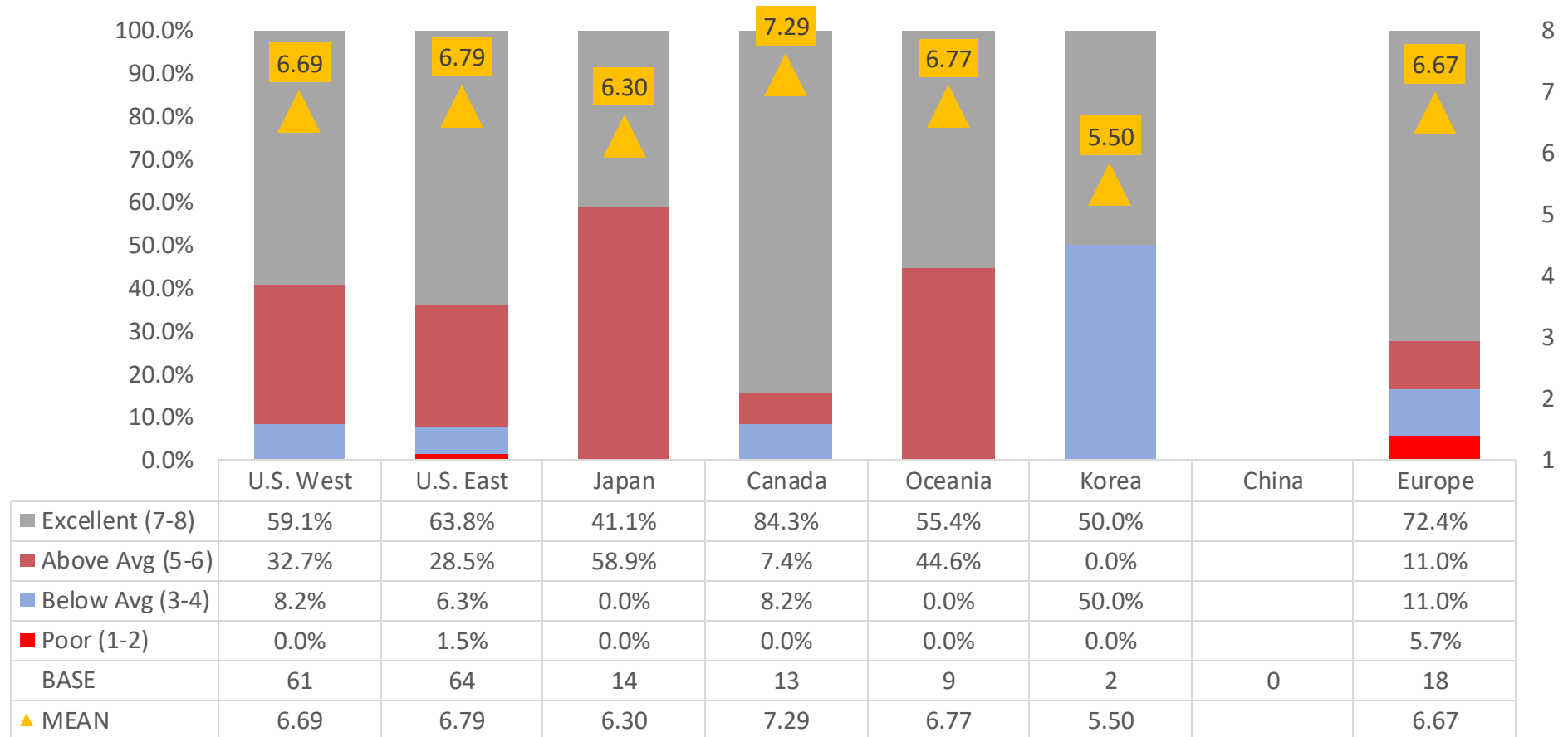
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



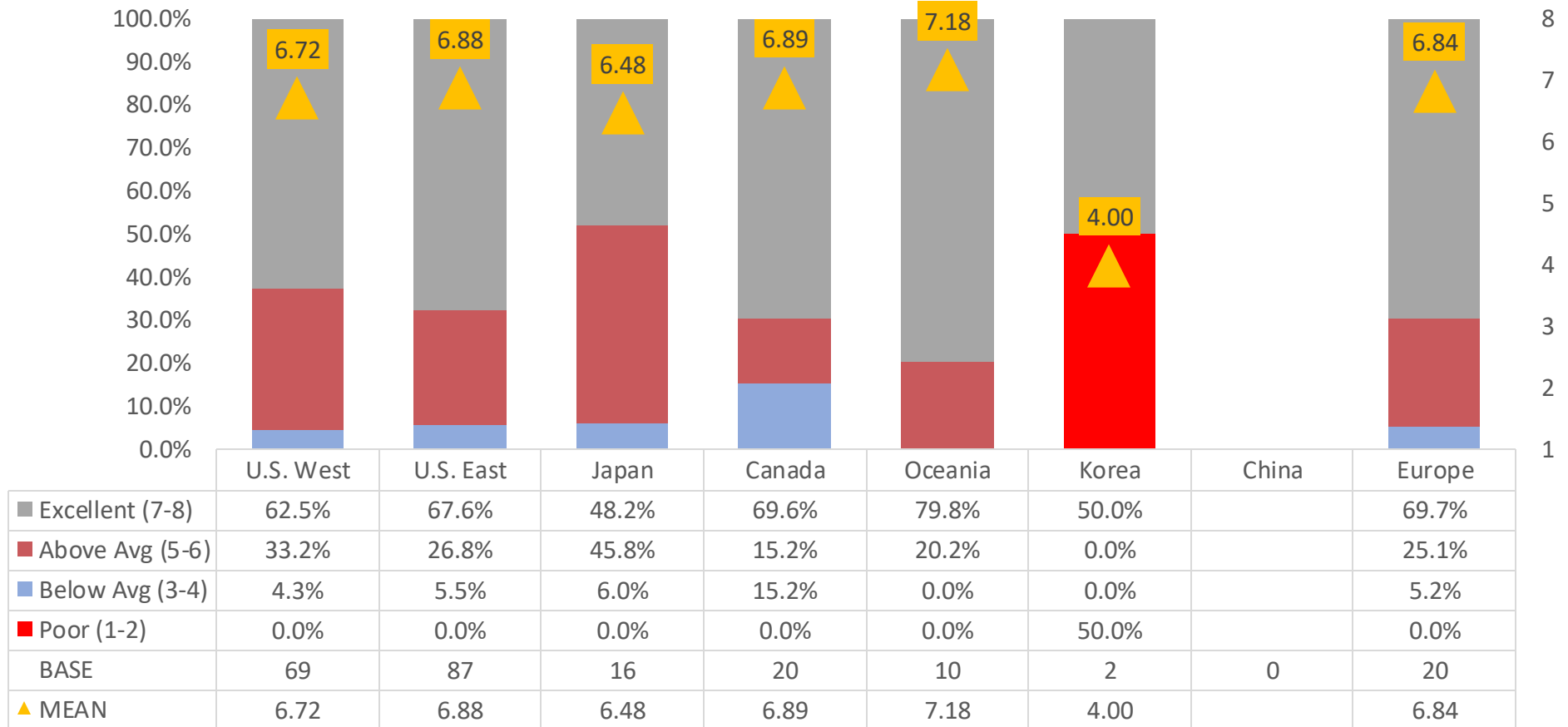
OVERALL ACCESSIBILITY - HOTELS

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



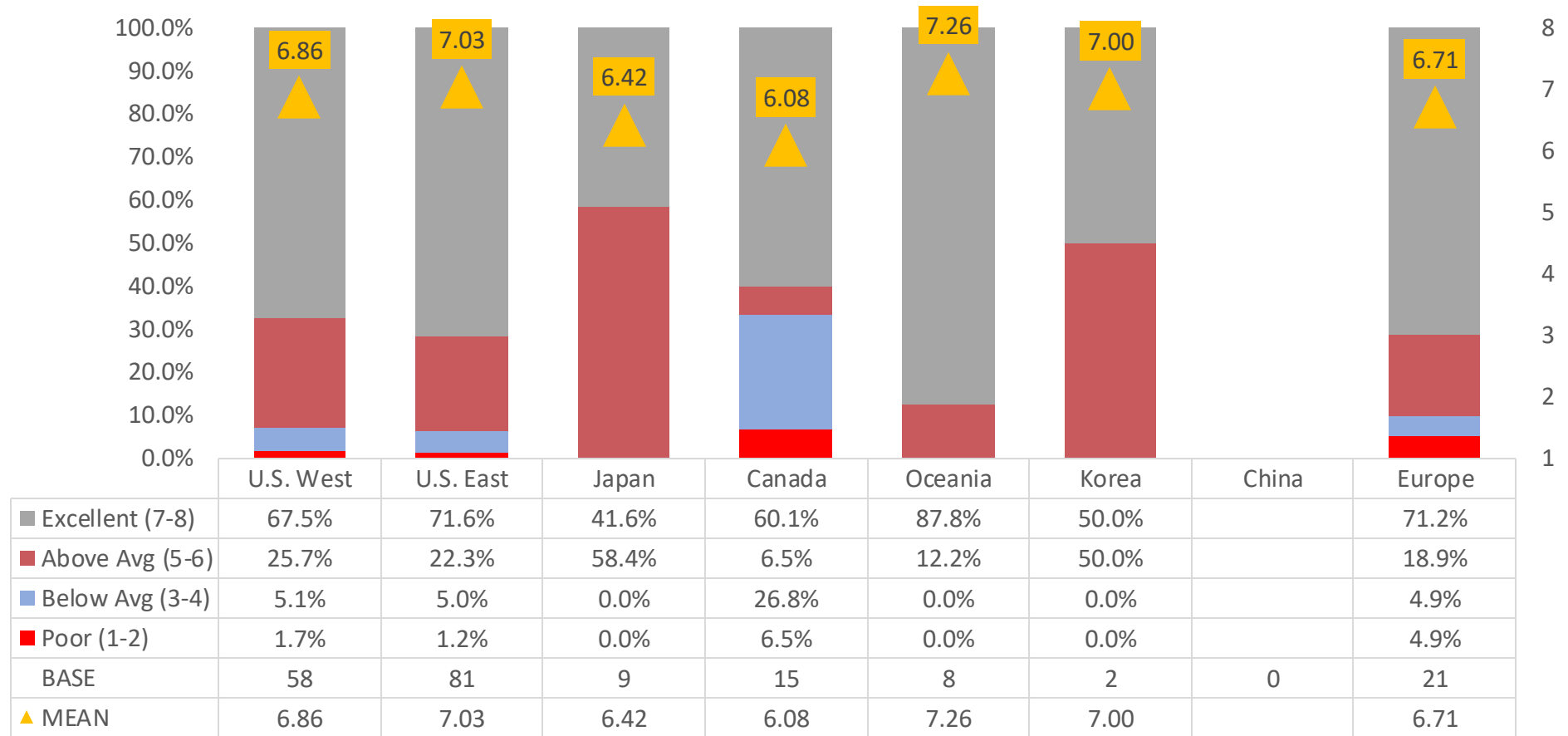
OVERALL ACCESSIBILITY - RESTAURANTS

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



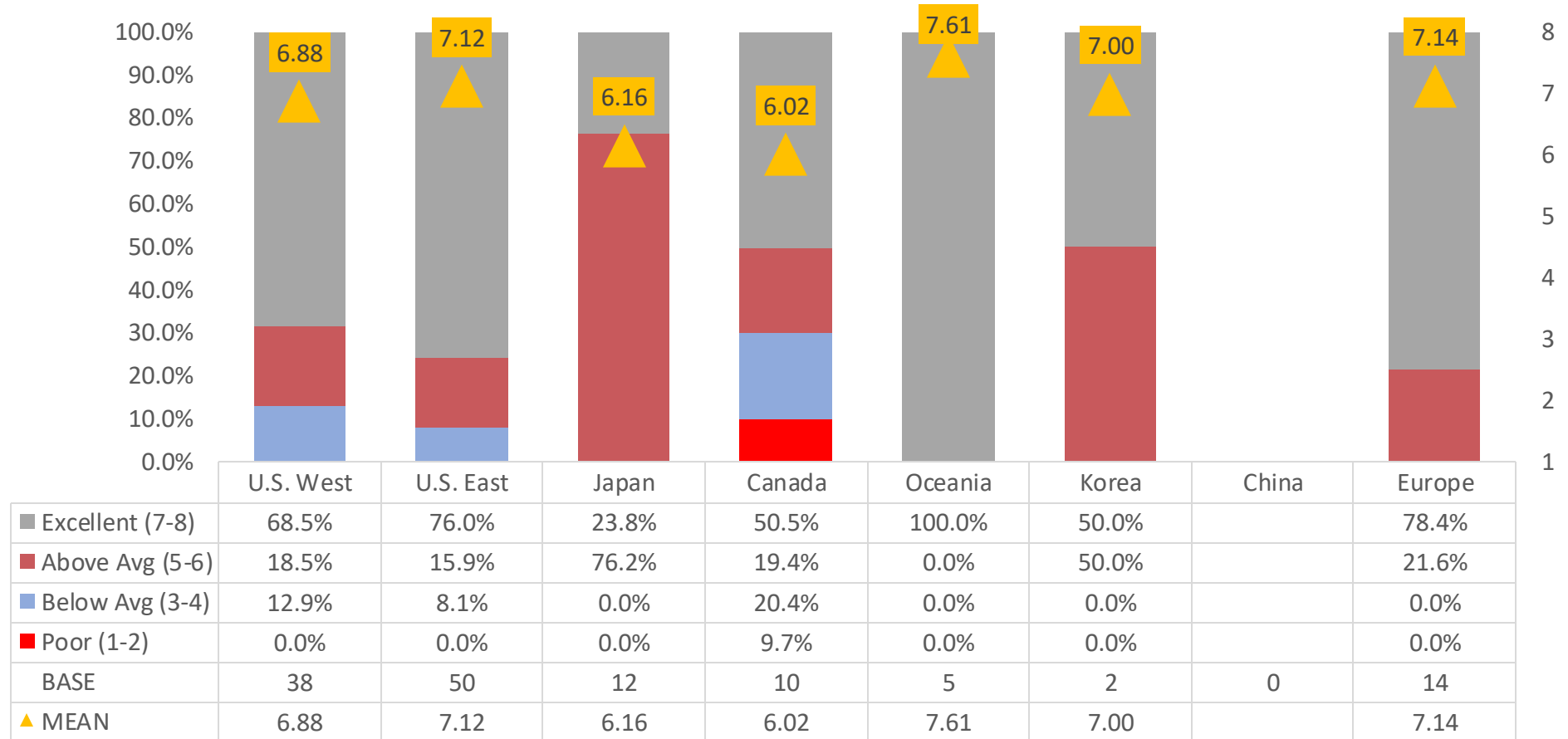
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



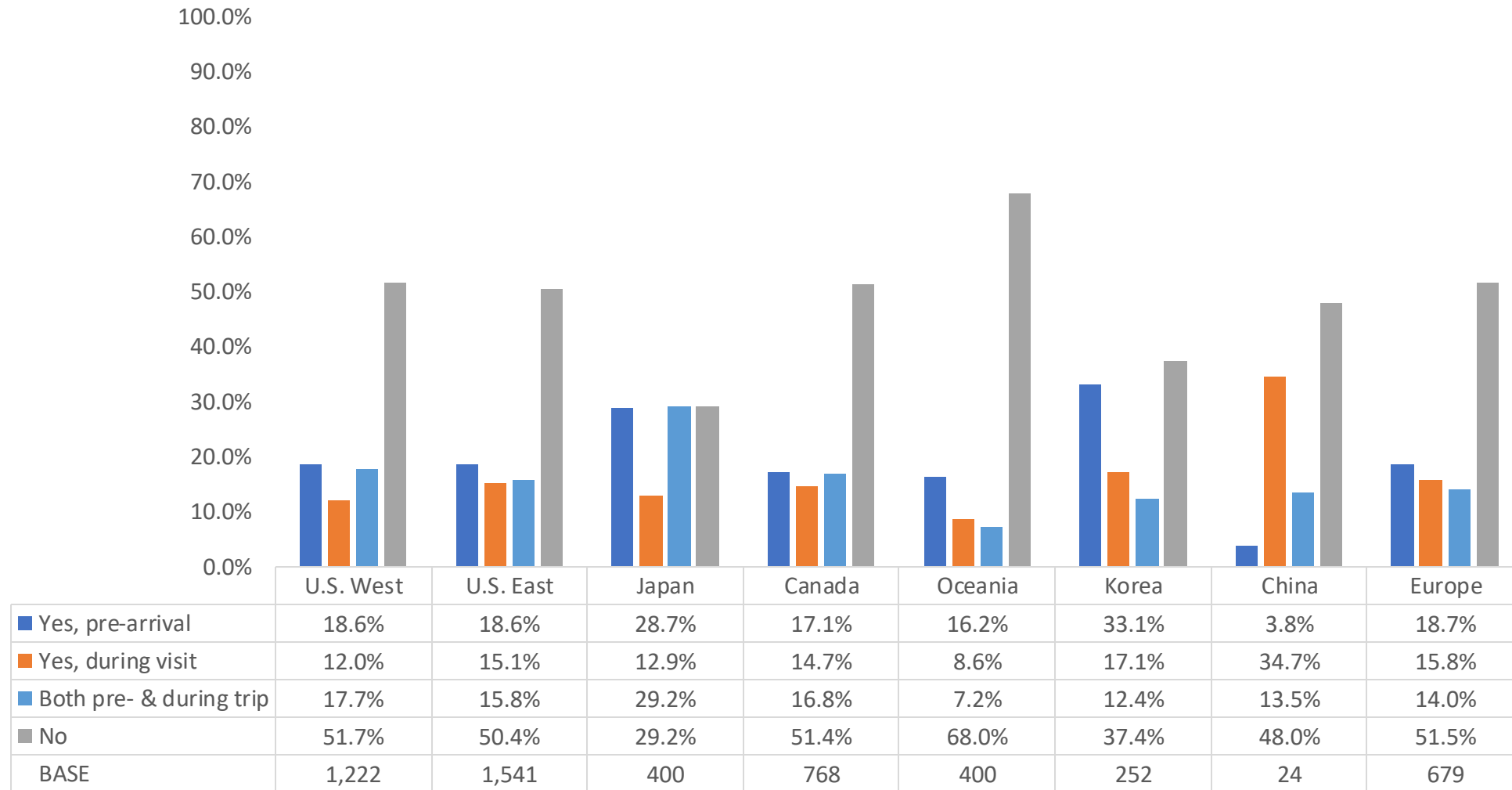
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

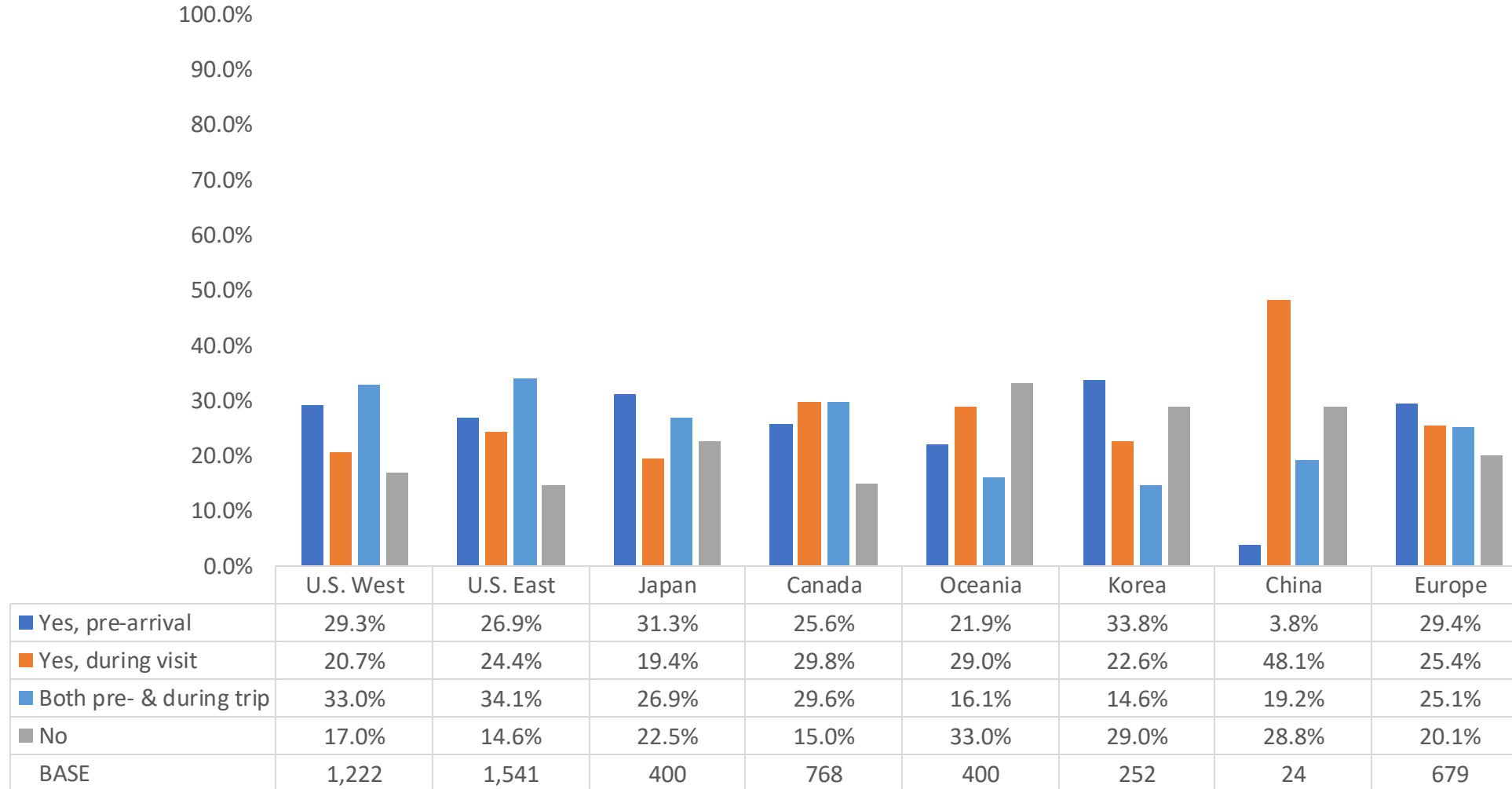


Section 4 – Alternative Messaging

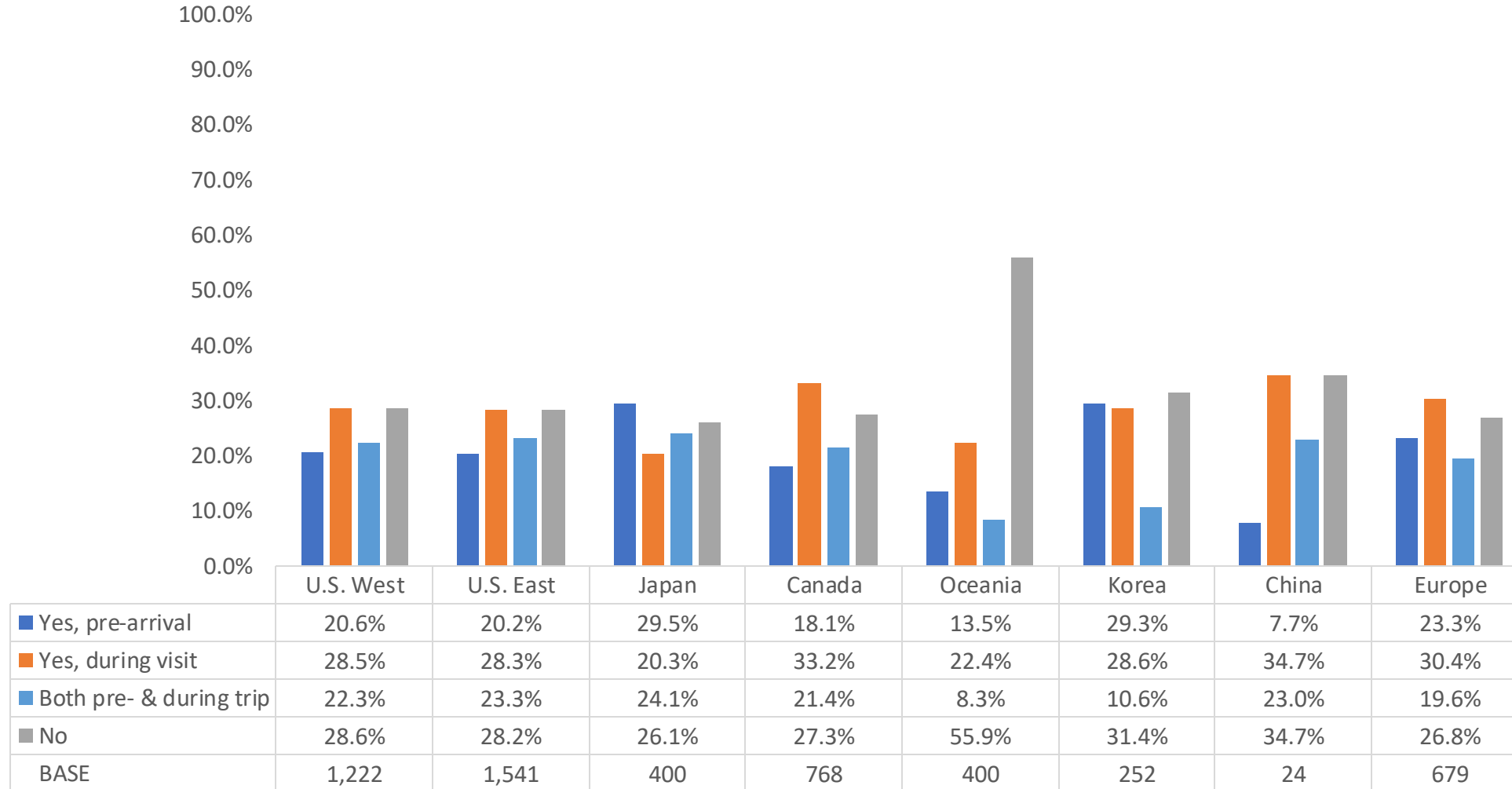
SAFE AND RESPONSIBLE TRAVEL



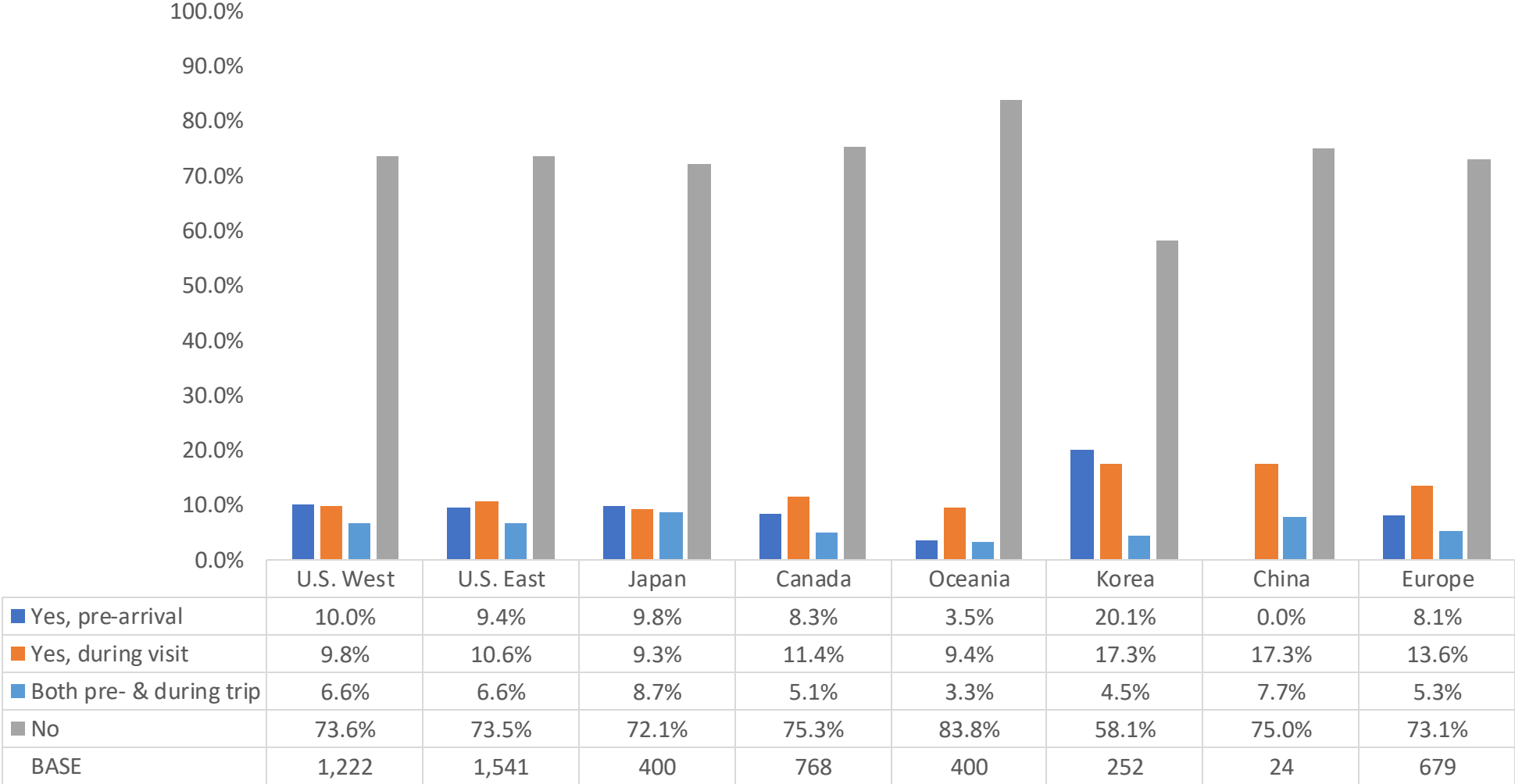
CARING FOR AND RESPECTING HAWAI‘I’S CULTURE, PEOPLE AND ENVIRONMENT



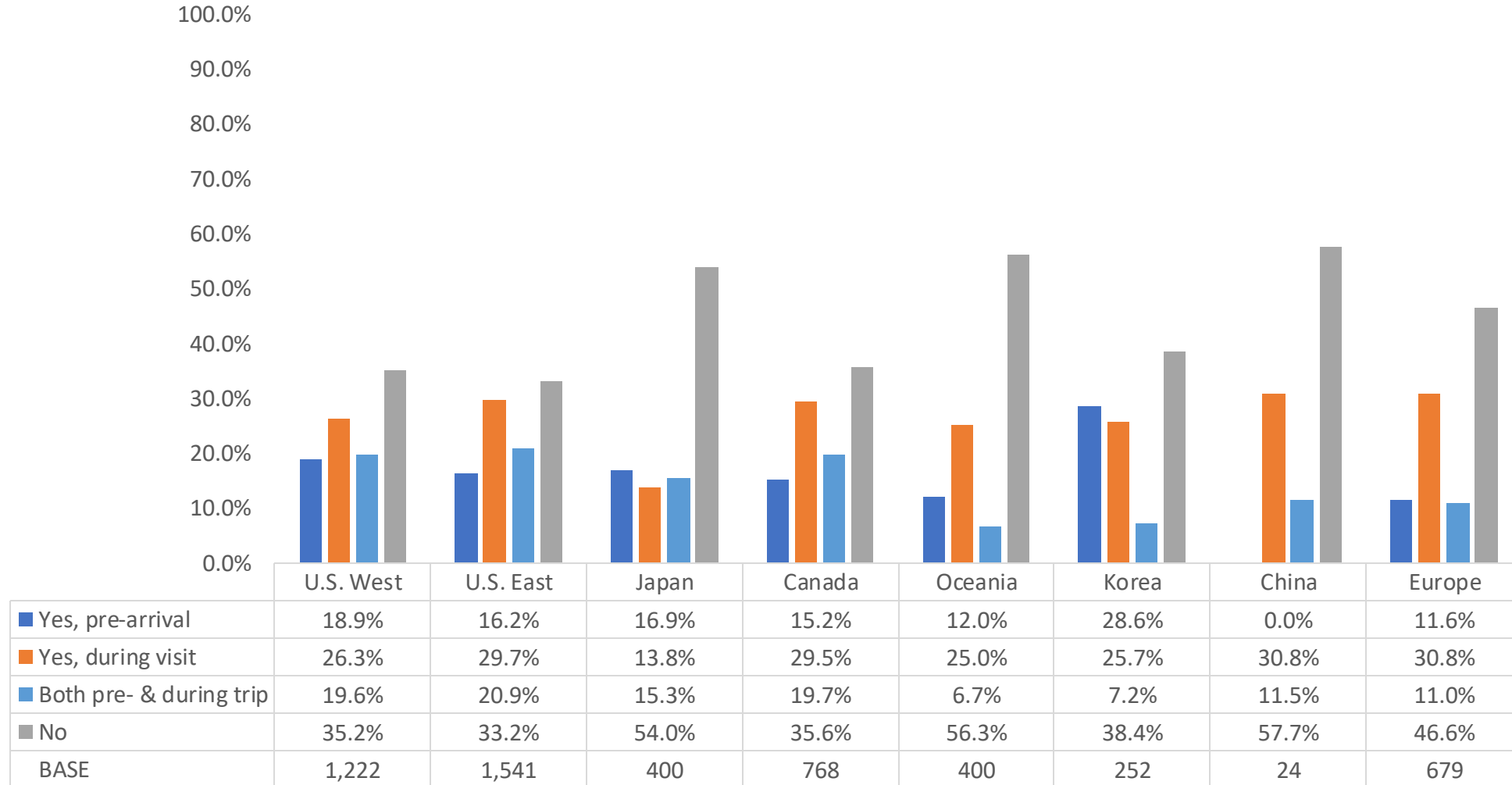
OCEAN AND HIKING SAFETY



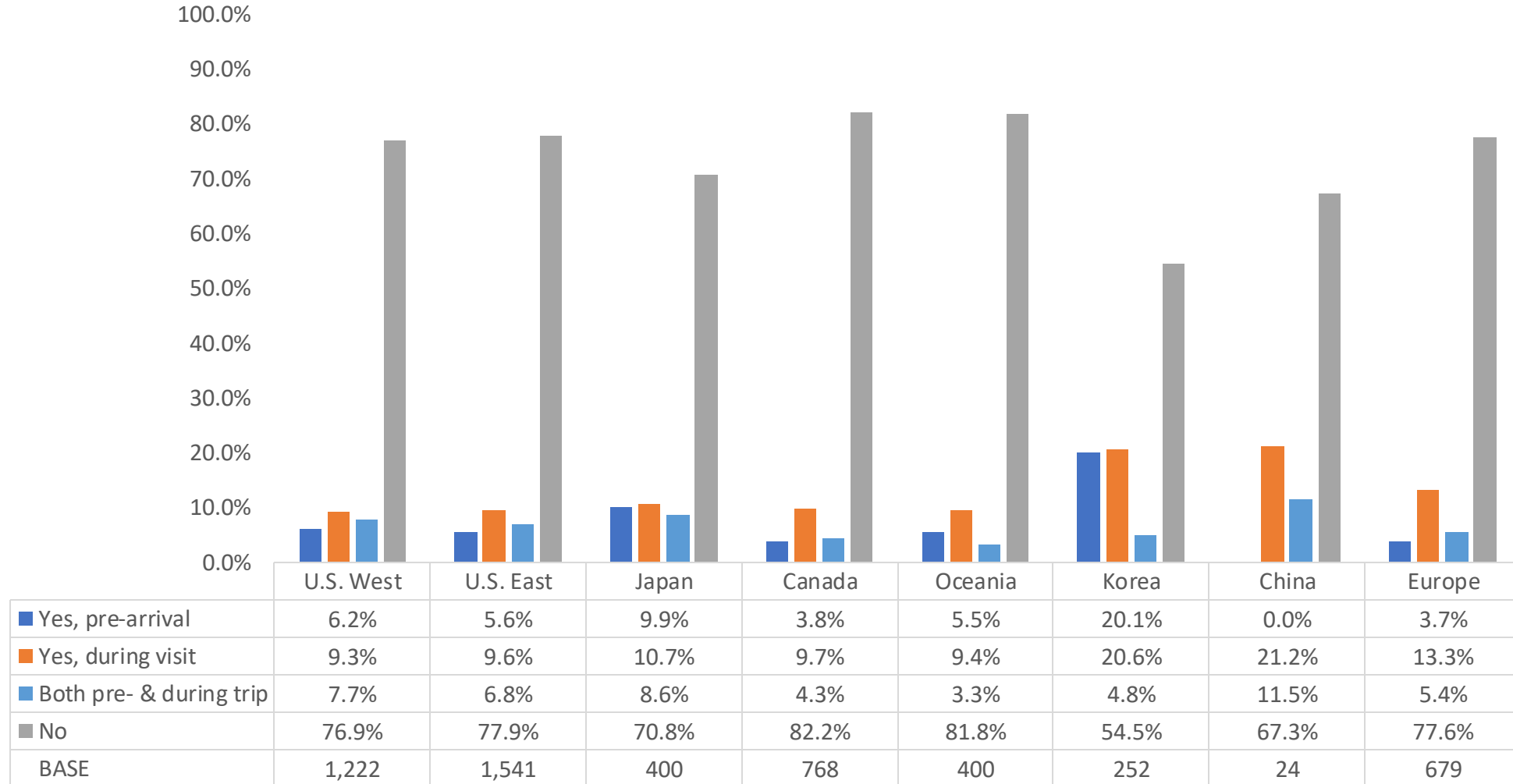
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL



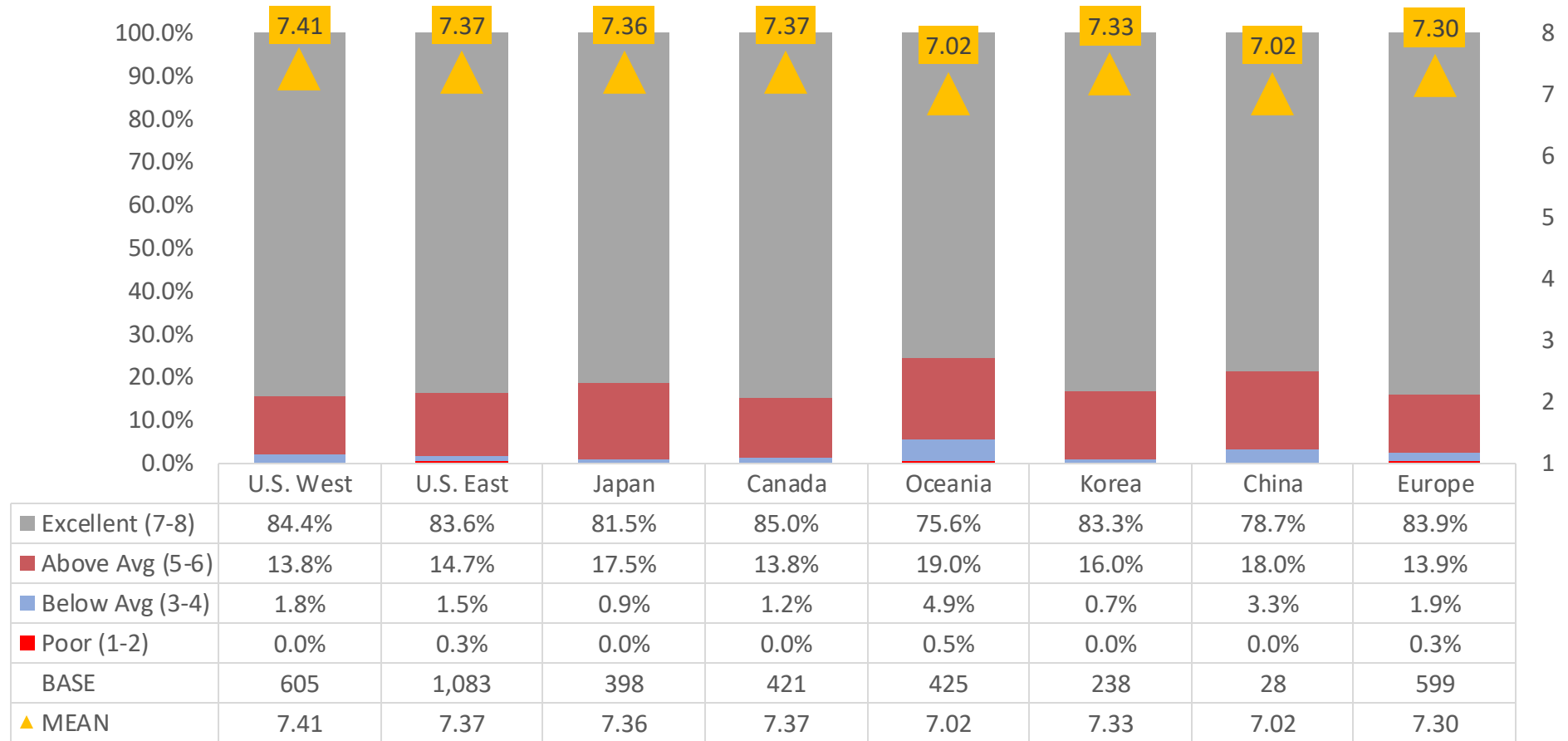
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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



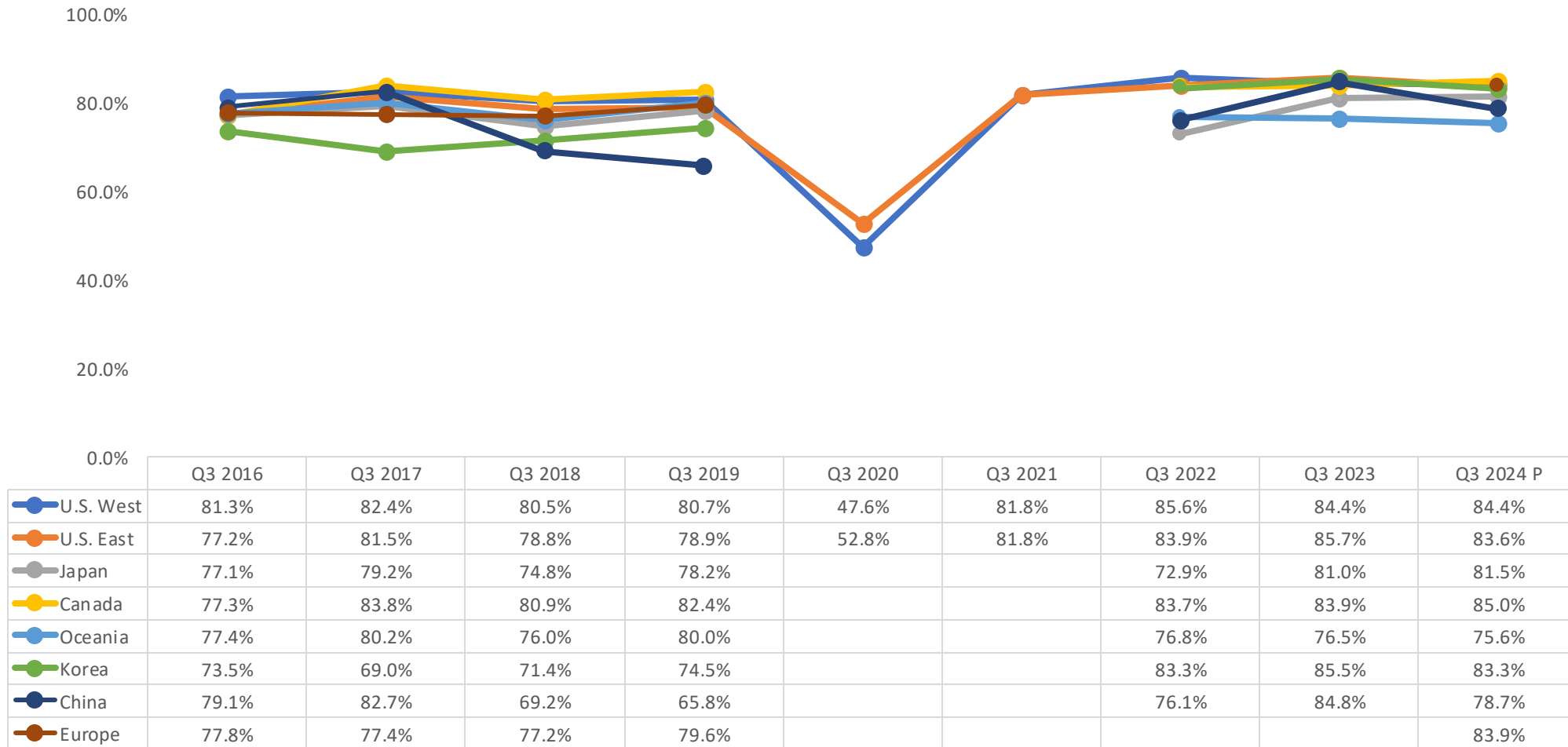
SATISFACTION – O‘AHU

- **Gender:** Female respondents from **U.S. East** expressed higher levels of satisfaction compared to male respondents from this visitor market.
- **Age:** Young adults (18 – 35 years old) from **U.S. West, U.S. East** and **Japan** gave higher satisfaction scores.
- **Islands visited:** Visitors from **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 **U.S. West** without a college degree were more satisfied with their stay than college graduates from this market.
- **Household income:** Those who reside in homes in the bottom income tier (<\$100K) from **U.S. West** gave higher satisfaction scores.

SATISFACTION - O‘AHU

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

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



P= Preliminary Data

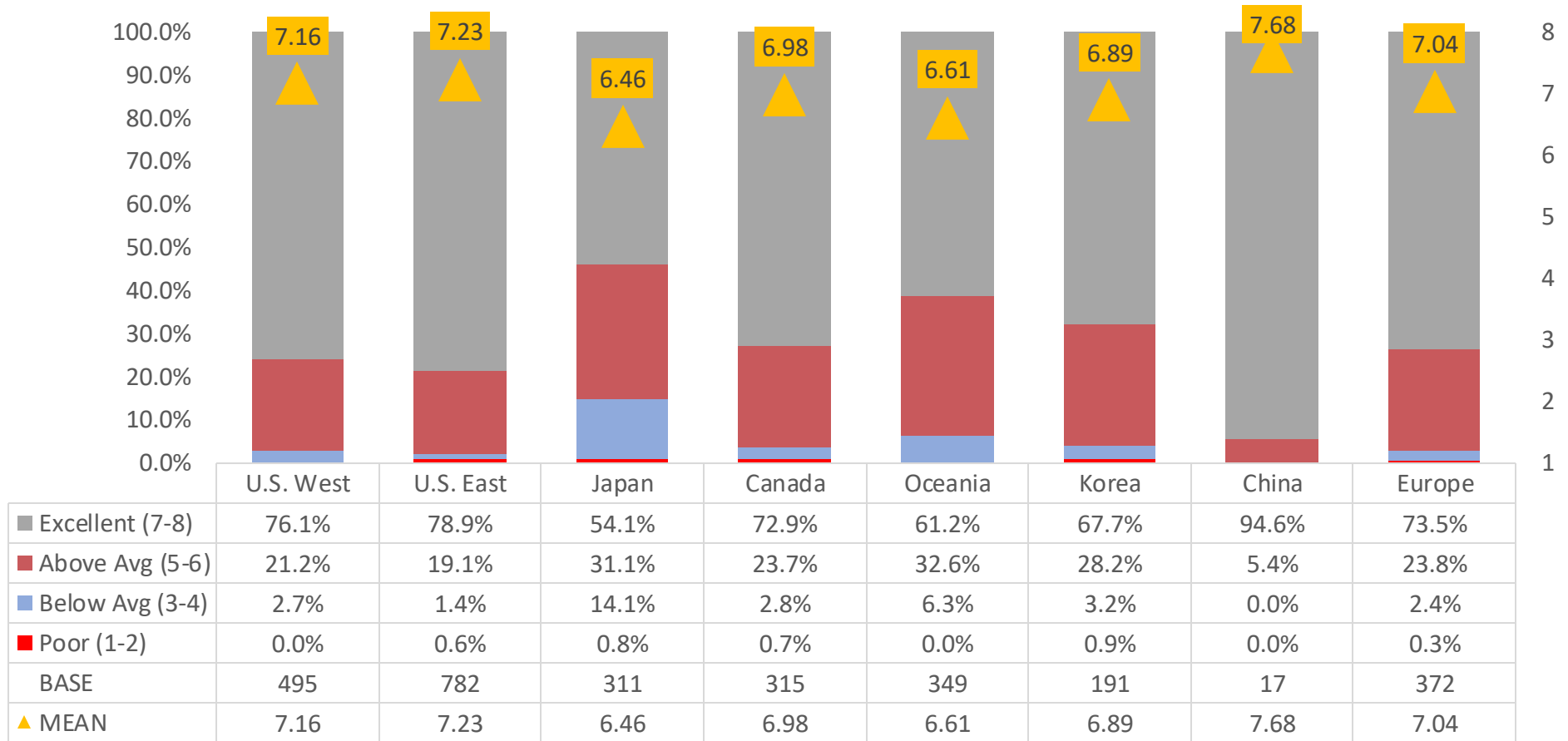
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on ___?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



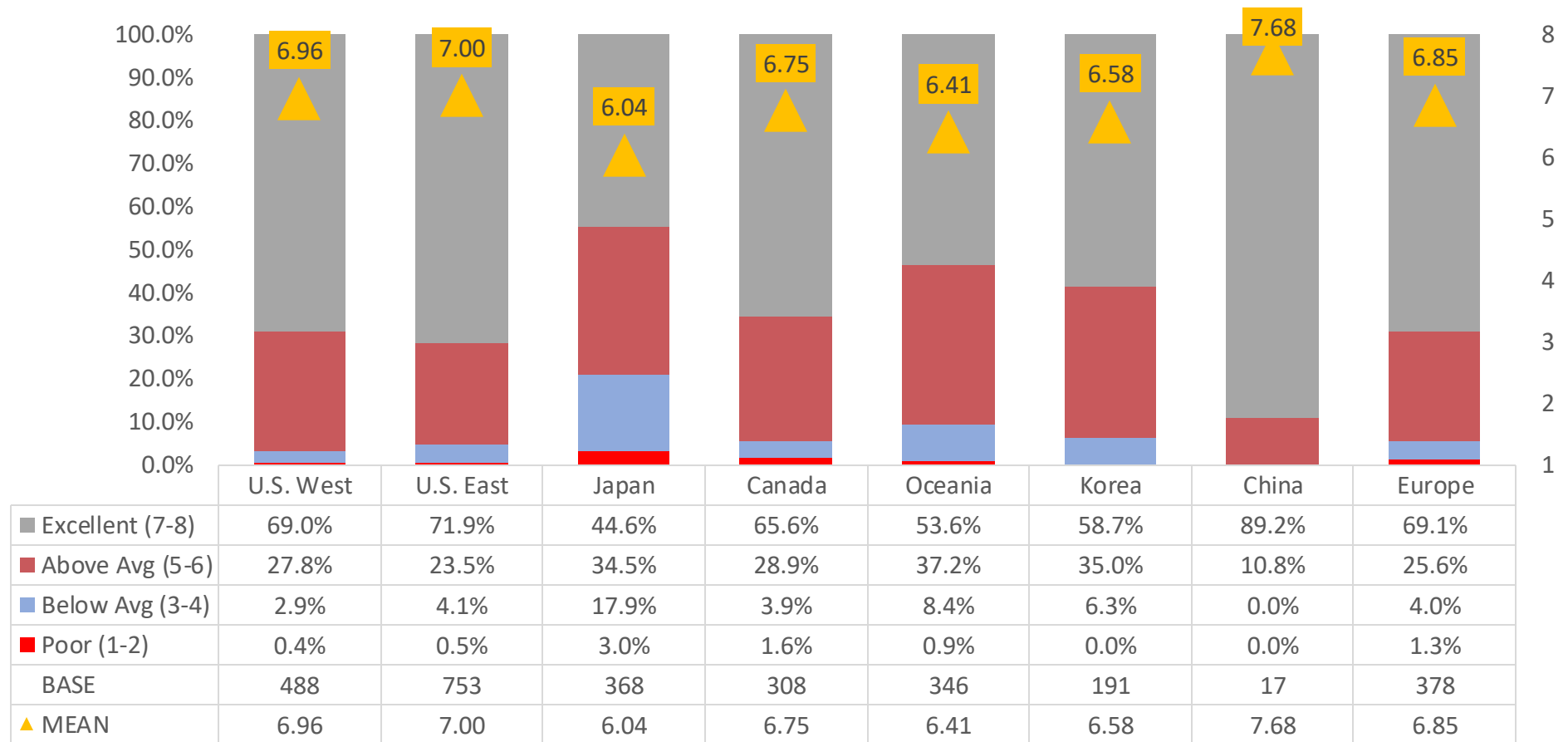
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



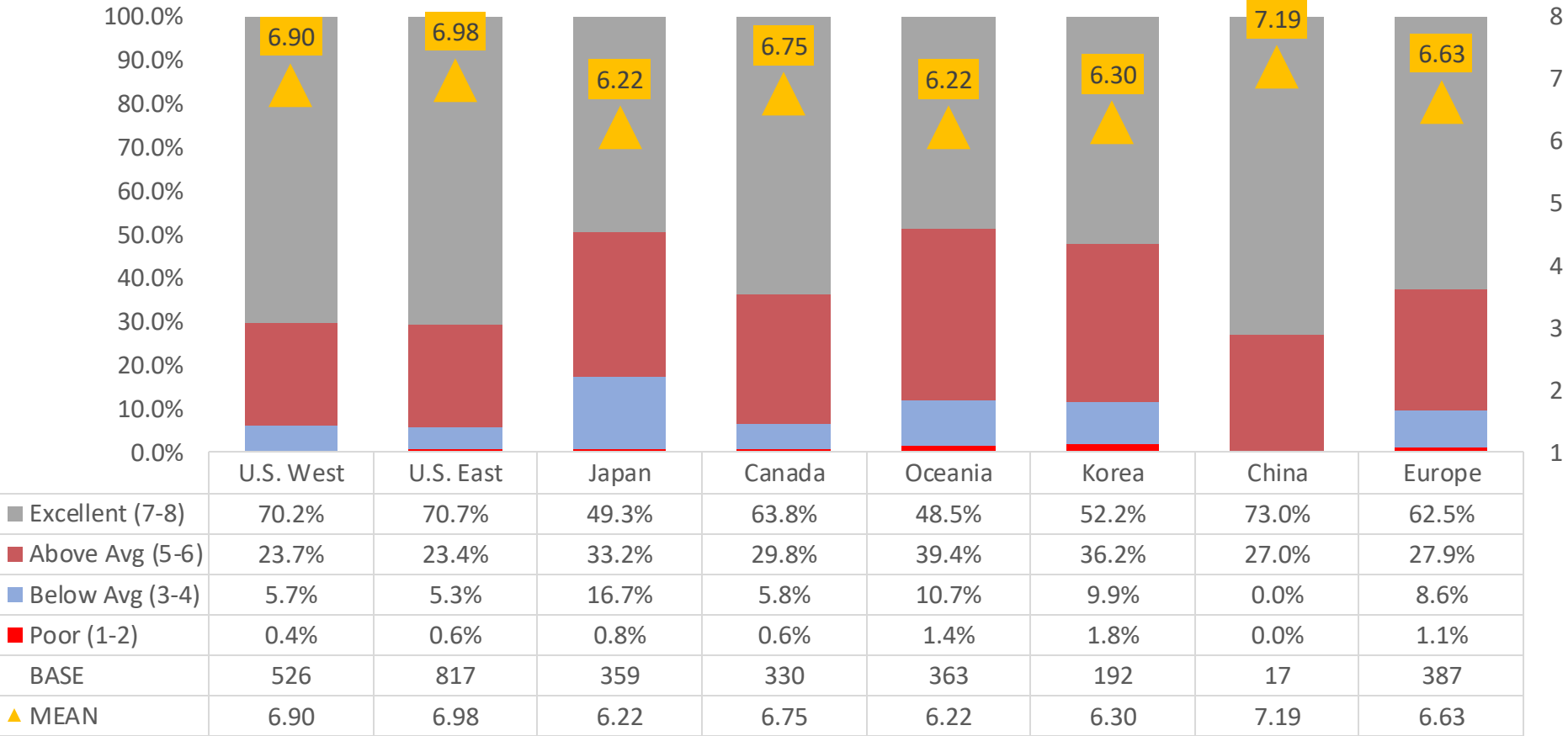
SHOPPING - O'AHU

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



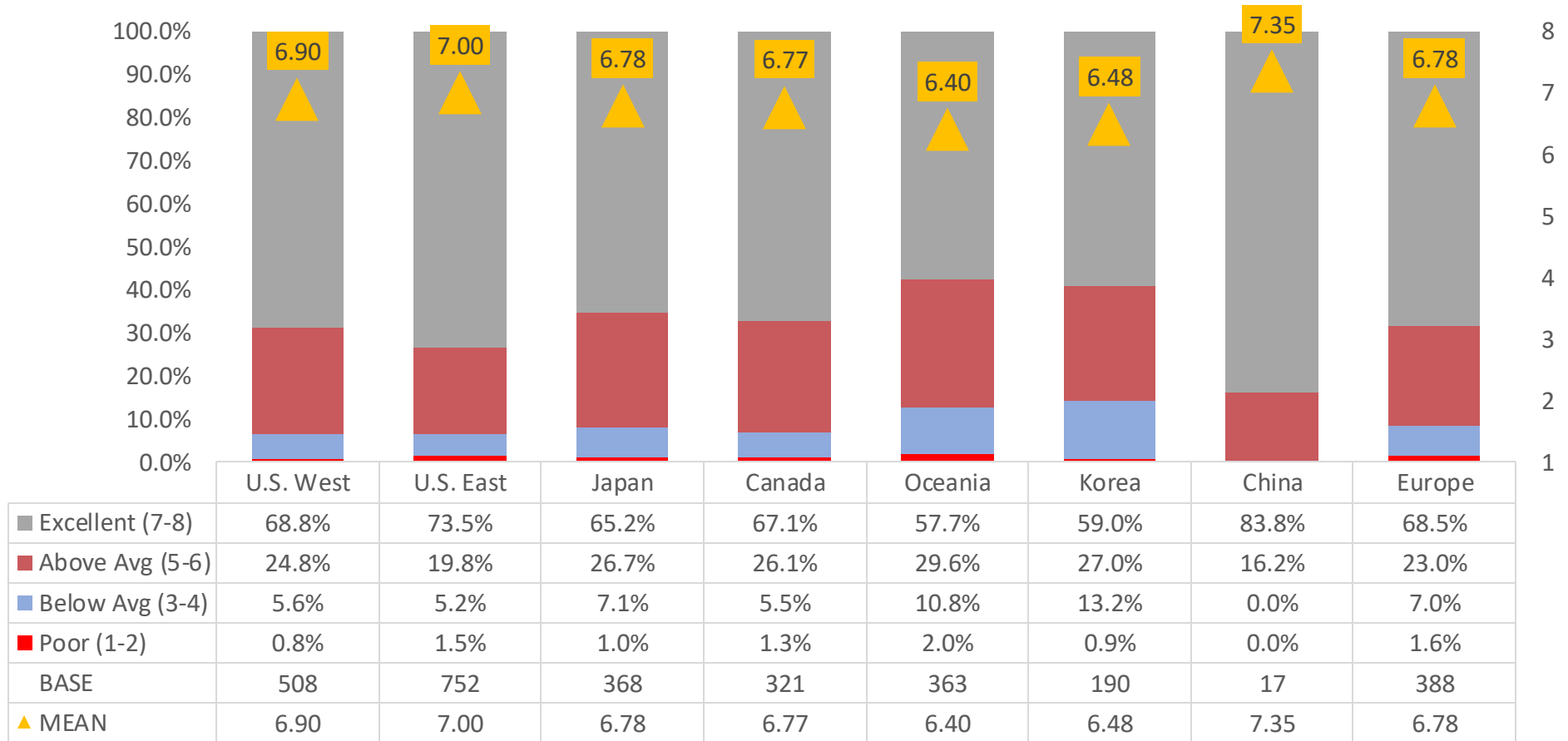
DINING/ FOOD & BEVERAGES - O'AHU

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



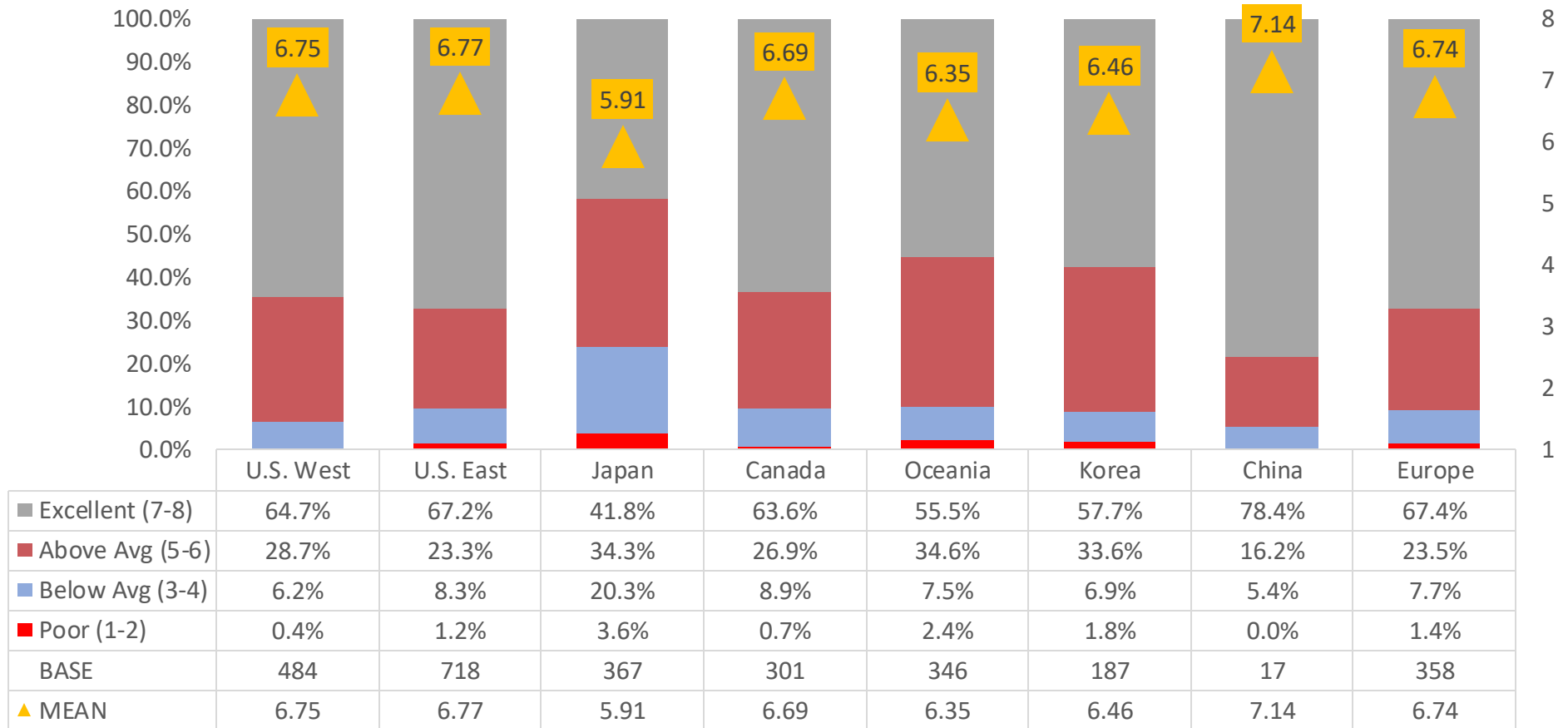
LODGING/ ACOMMODATIONS - O'AHU

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



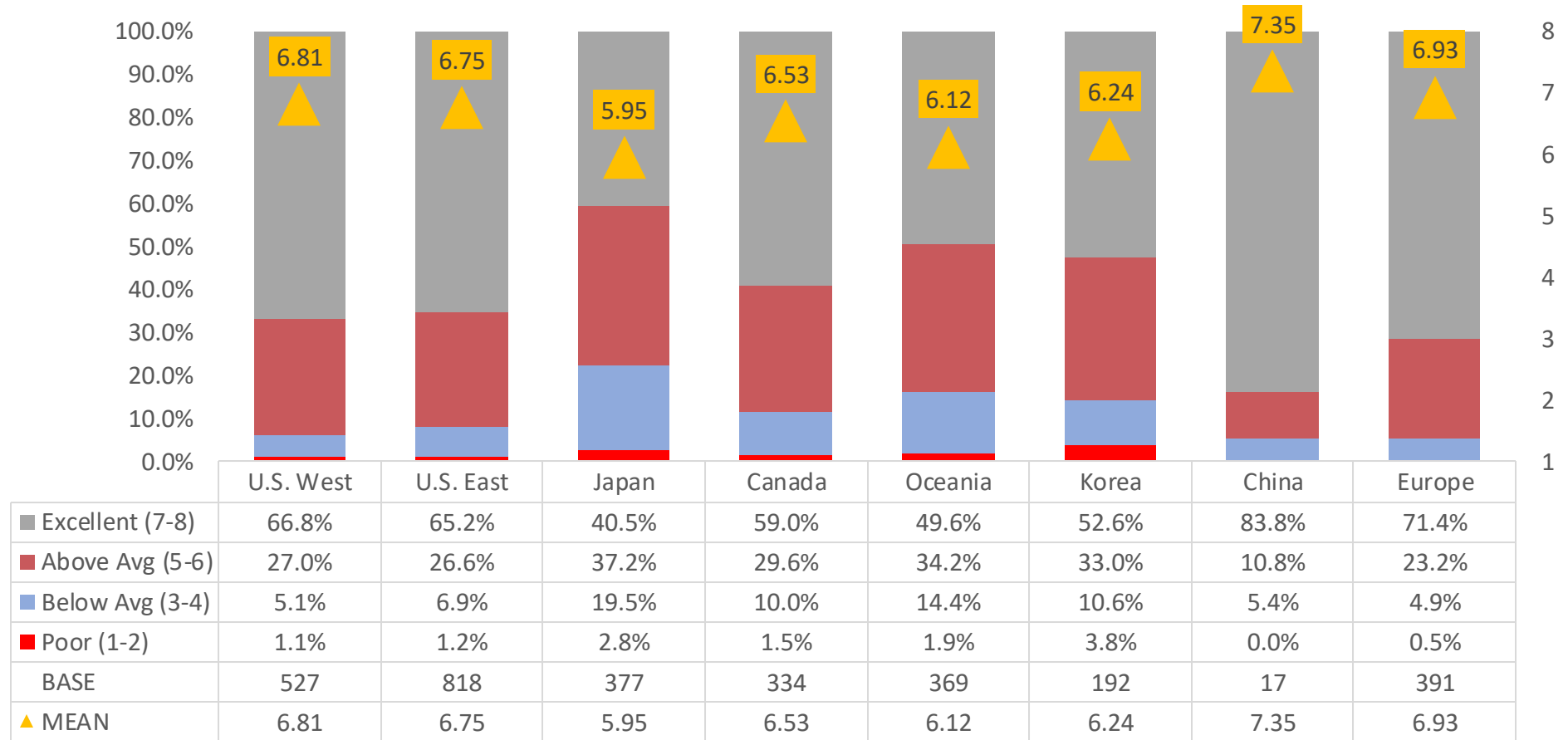
TRANSPORTATION ON ISLAND - O'AHU

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



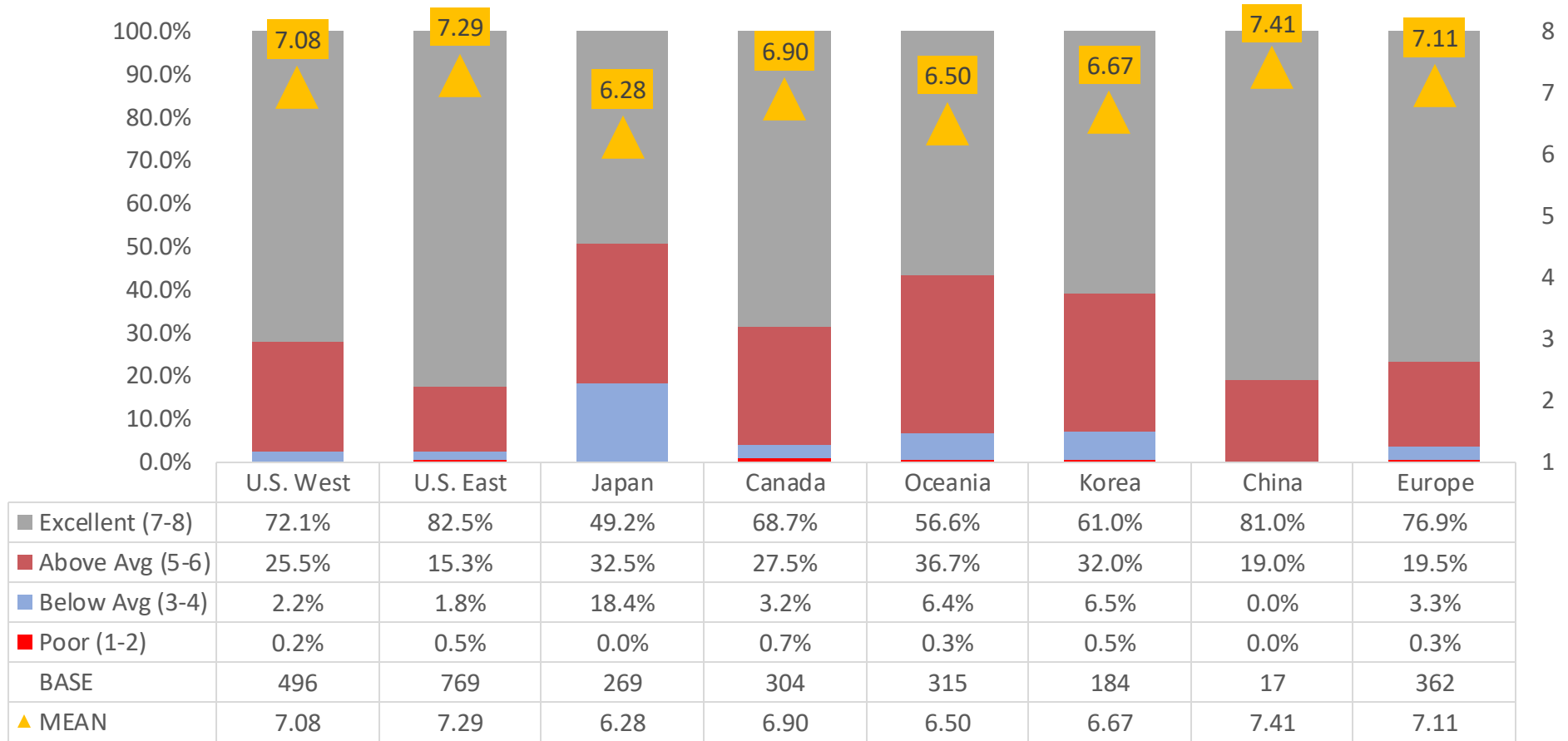
AIRPORT - O'AHU

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



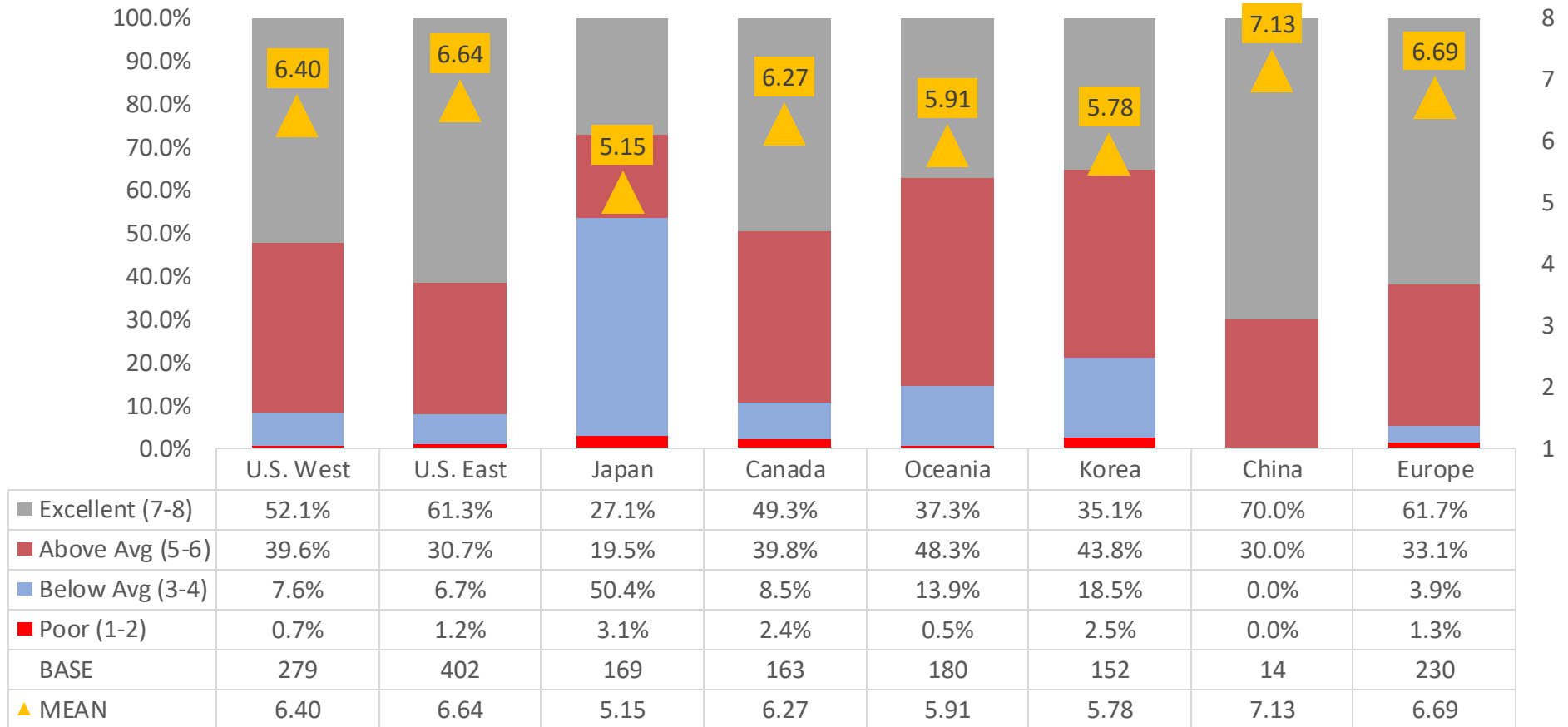
CULTURAL EXPERIENCES - O'AHU

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



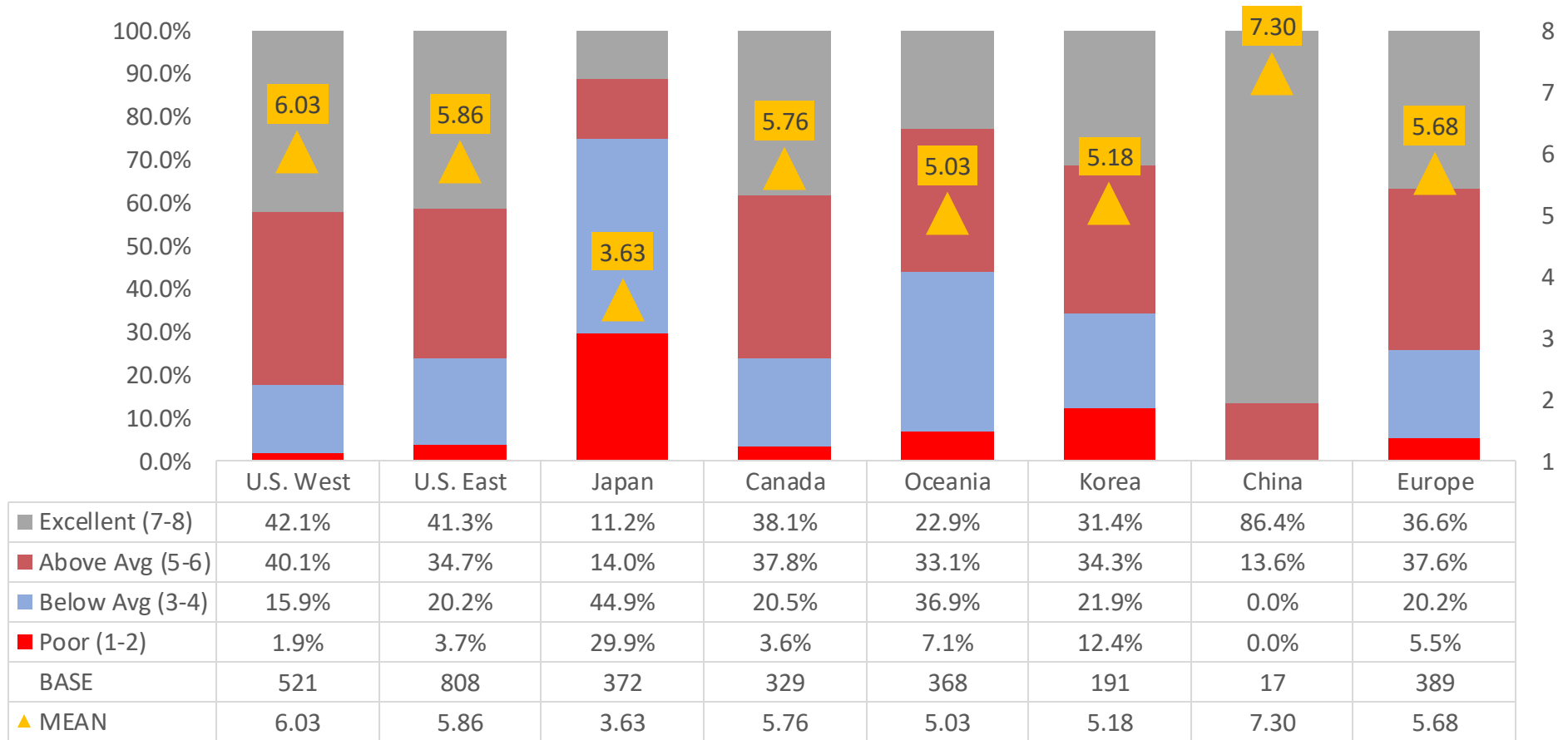
VOLUNTEER EXPERIENCES - O'AHU

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



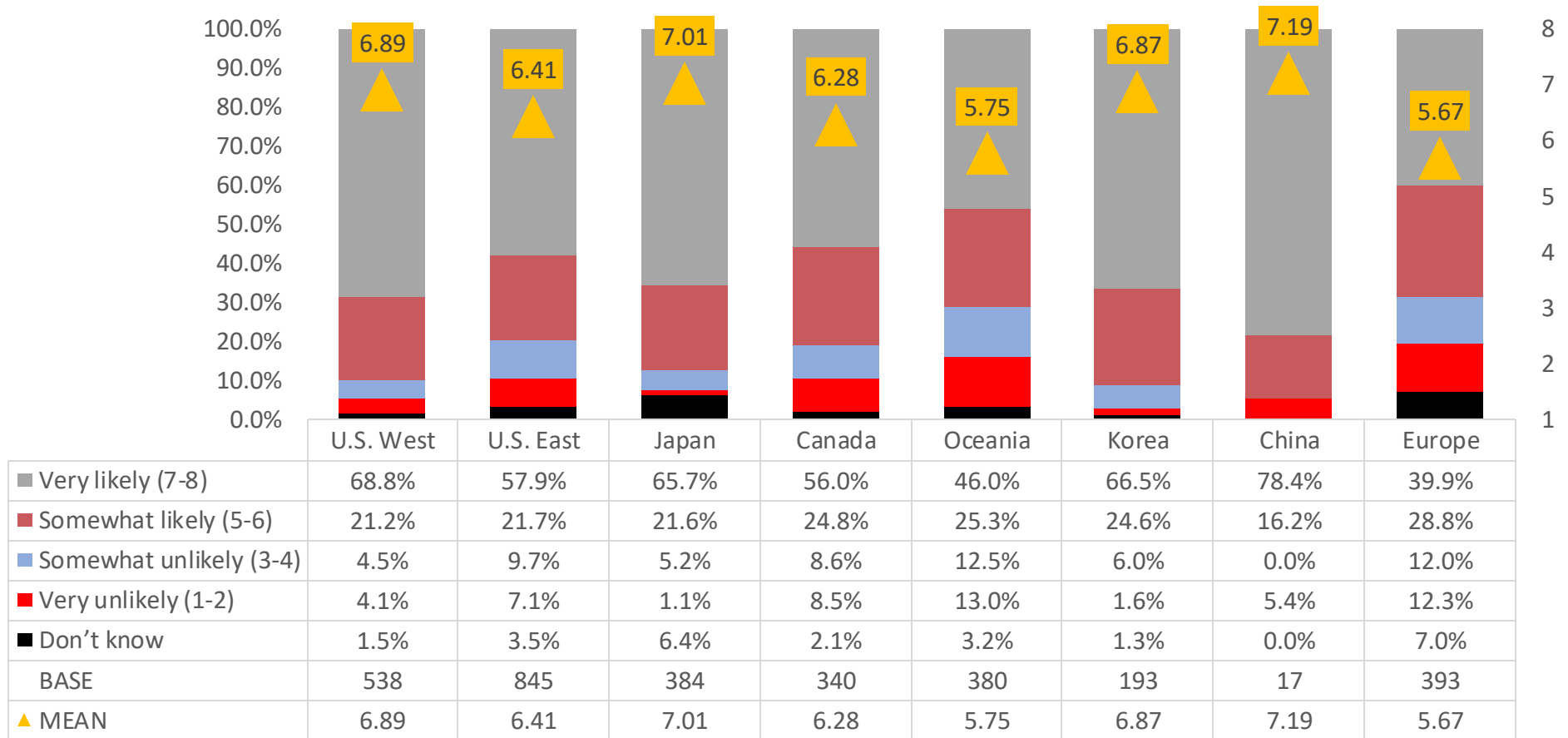
OVERALL VALUE FOR THE MONEY - O'AHU

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



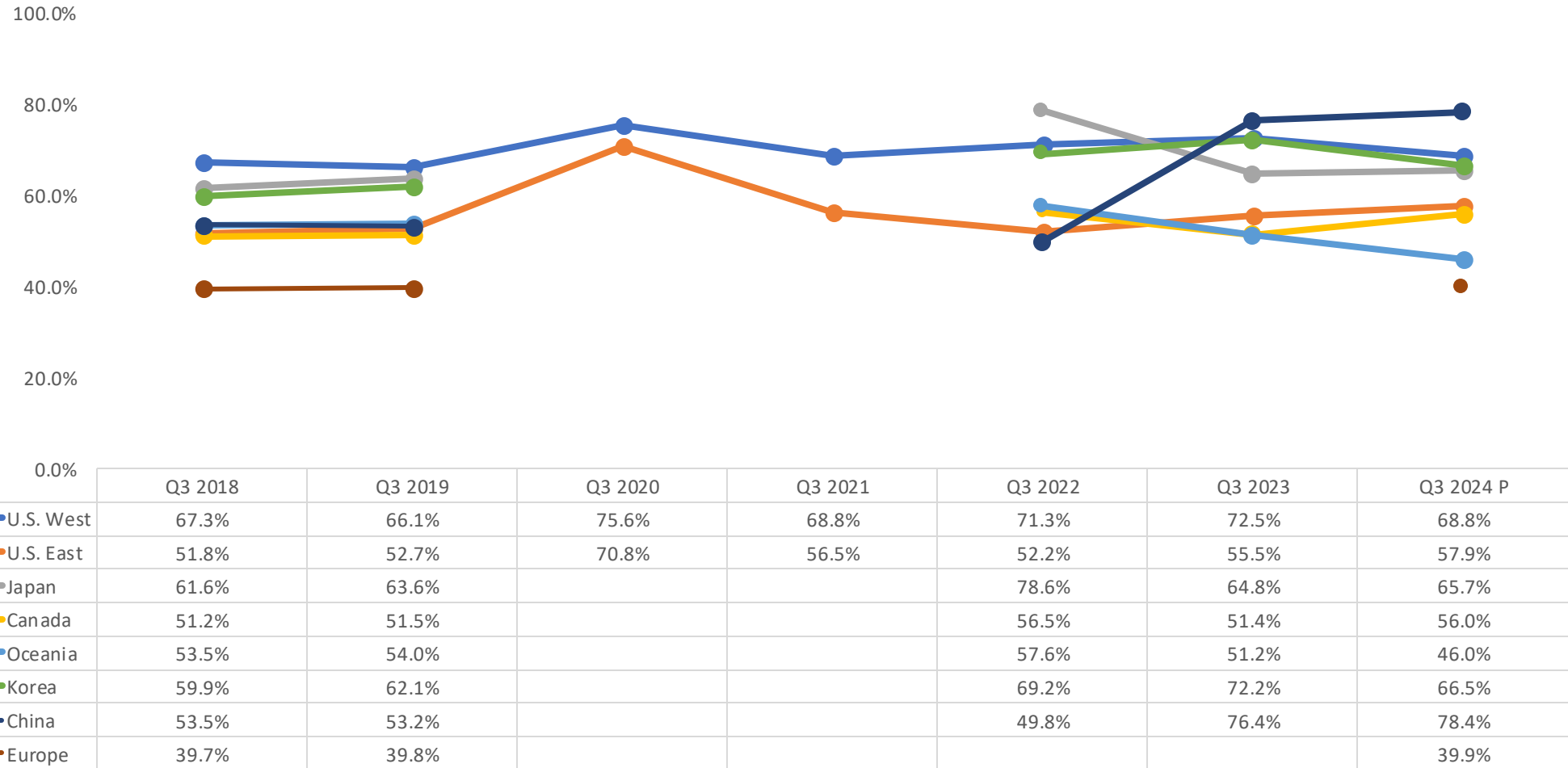
LIKELIHOOD OF RETURN VISIT - O‘AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)



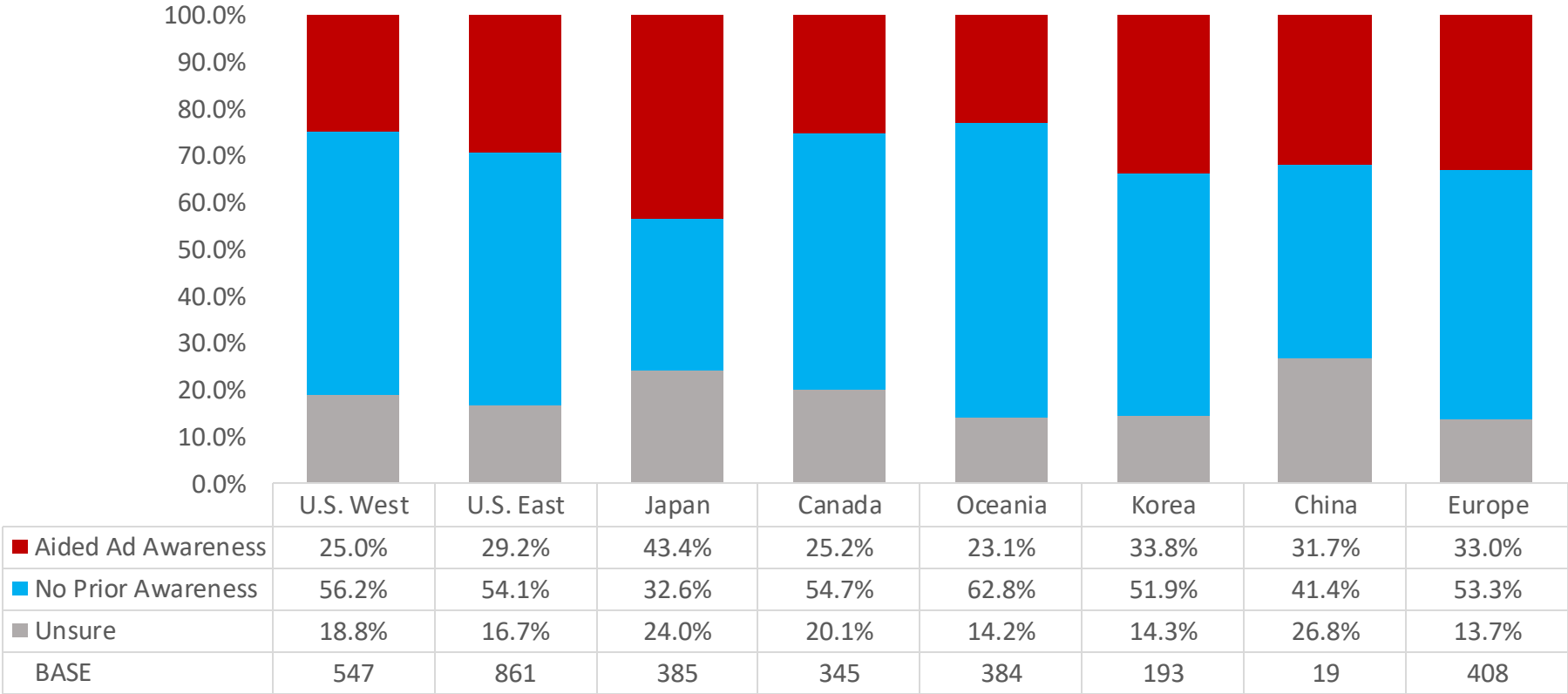
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



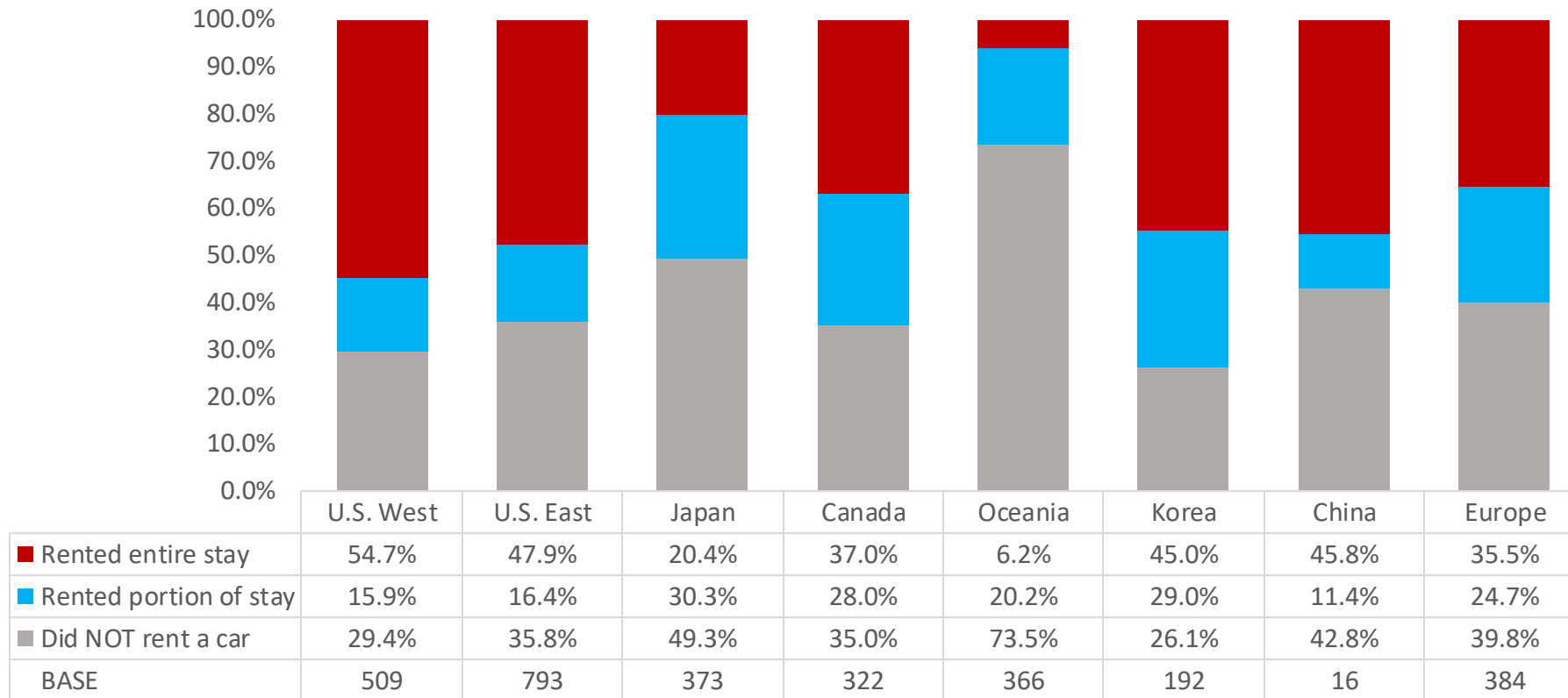
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	43.1%	45.3%	46.3%	51.9%	42.5%	61.6%	61.5%	57.5%
Hawaiian cultural events	15.3%	15.3%	13.6%	13.6%	7.3%	12.9%	6.5%	16.3%
Social media posts and videos	15.5%	13.7%	30.6%	24.2%	11.9%	10.2%	15.8%	24.4%
Television programs or movies filmed in Hawai'i	10.3%	10.6%	40.3%	16.4%	16.6%	23.1%	15.6%	31.7%
Outdoor or sporting activities and events	16.5%	12.3%	10.0%	15.7%	7.7%	41.1%	11.6%	15.3%
Hawaiian music	7.6%	6.5%	19.5%	9.6%	4.4%	0.0%	1.8%	10.3%
BASE	544	859	384	345	381	18	193	403

CAR RENTAL - O'AHU

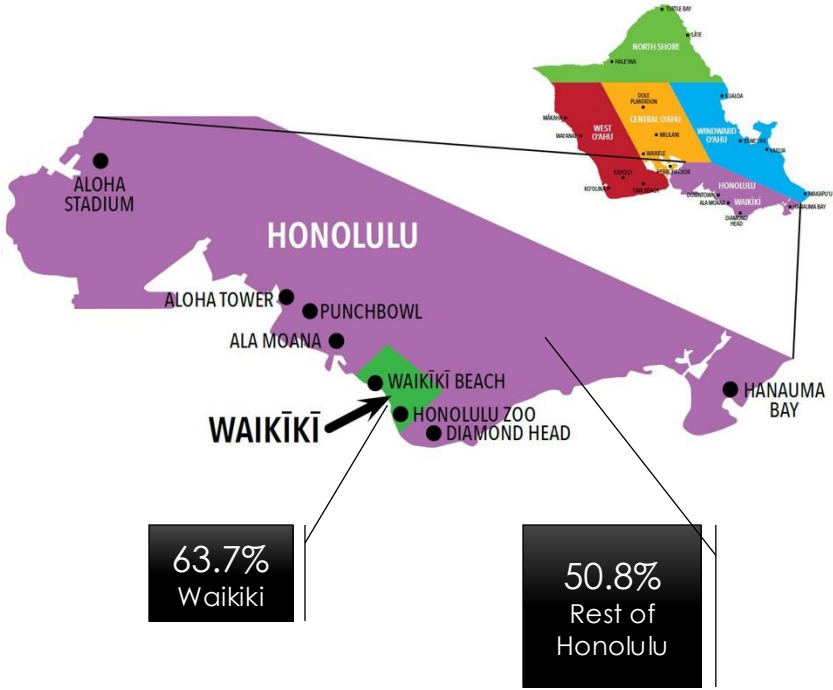
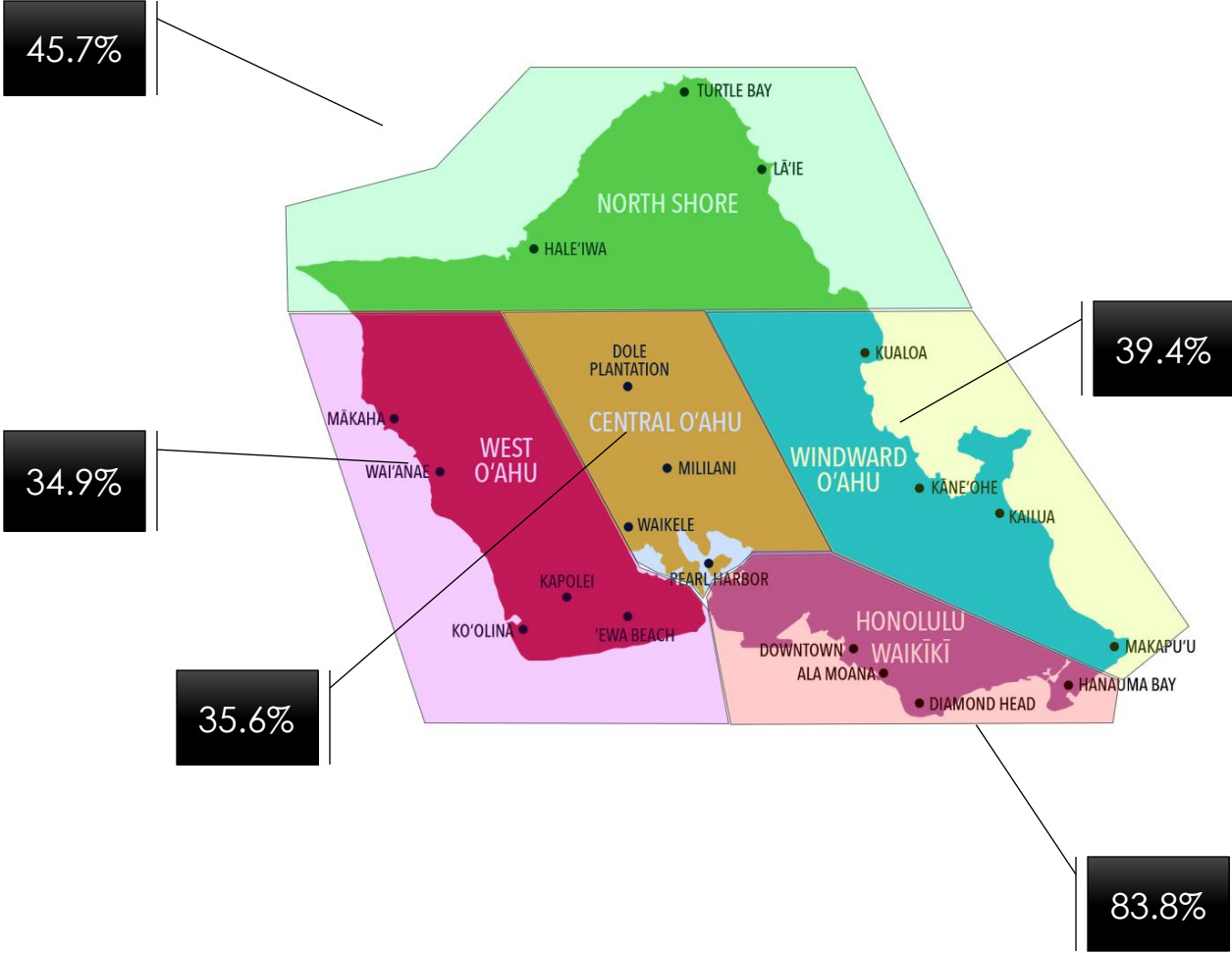


REASONS FOR PARTIAL RENTAL CAR - O'AHU

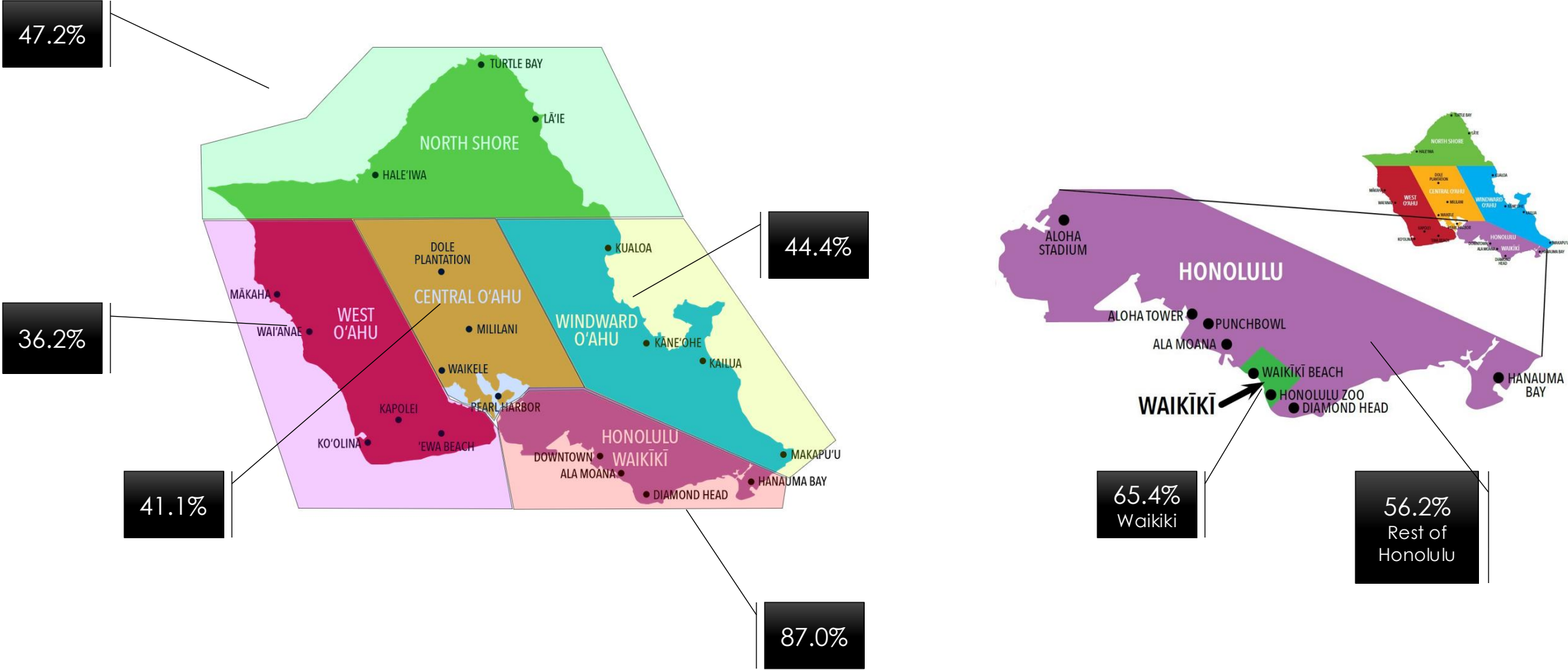
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	75.1%	81.2%	68.6%	77.9%	73.8%	50.0%	57.3%	66.7%
Parking was too expensive at my hotel/ lodging	40.9%	41.9%	17.3%	48.1%	20.6%	50.0%	44.2%	38.6%
Car rental rates were too expensive	27.4%	18.8%	27.1%	32.4%	19.5%	50.0%	29.4%	16.1%
Wanted to reduce my carbon footprint	12.6%	10.7%	2.9%	9.0%	9.6%	0.0%	12.5%	16.0%
Vehicles were not available for all of my trip dates	0.0%	1.6%	9.1%	0.0%	2.6%	0.0%	7.0%	5.3%
BASE	80	128	111	90	73	2	56	93



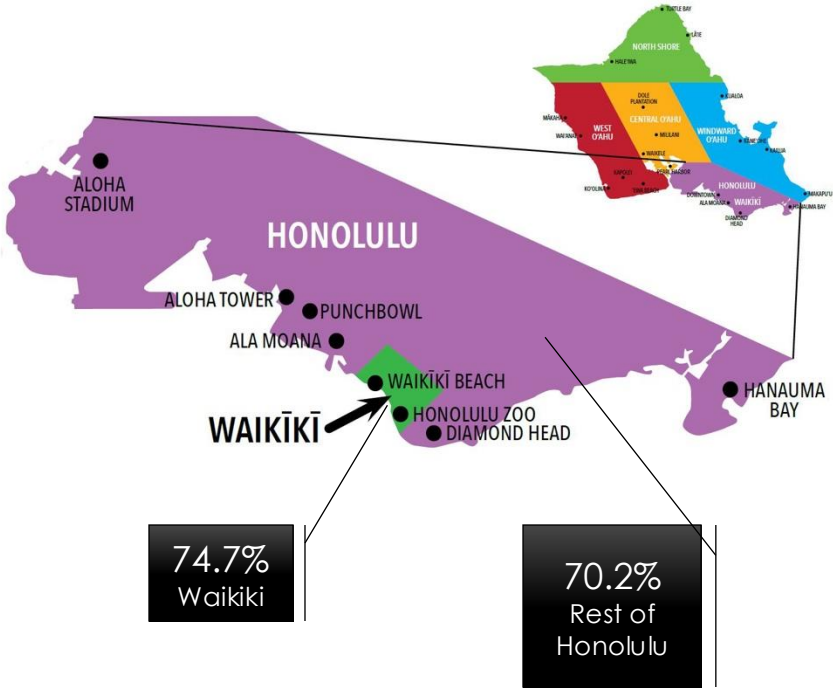
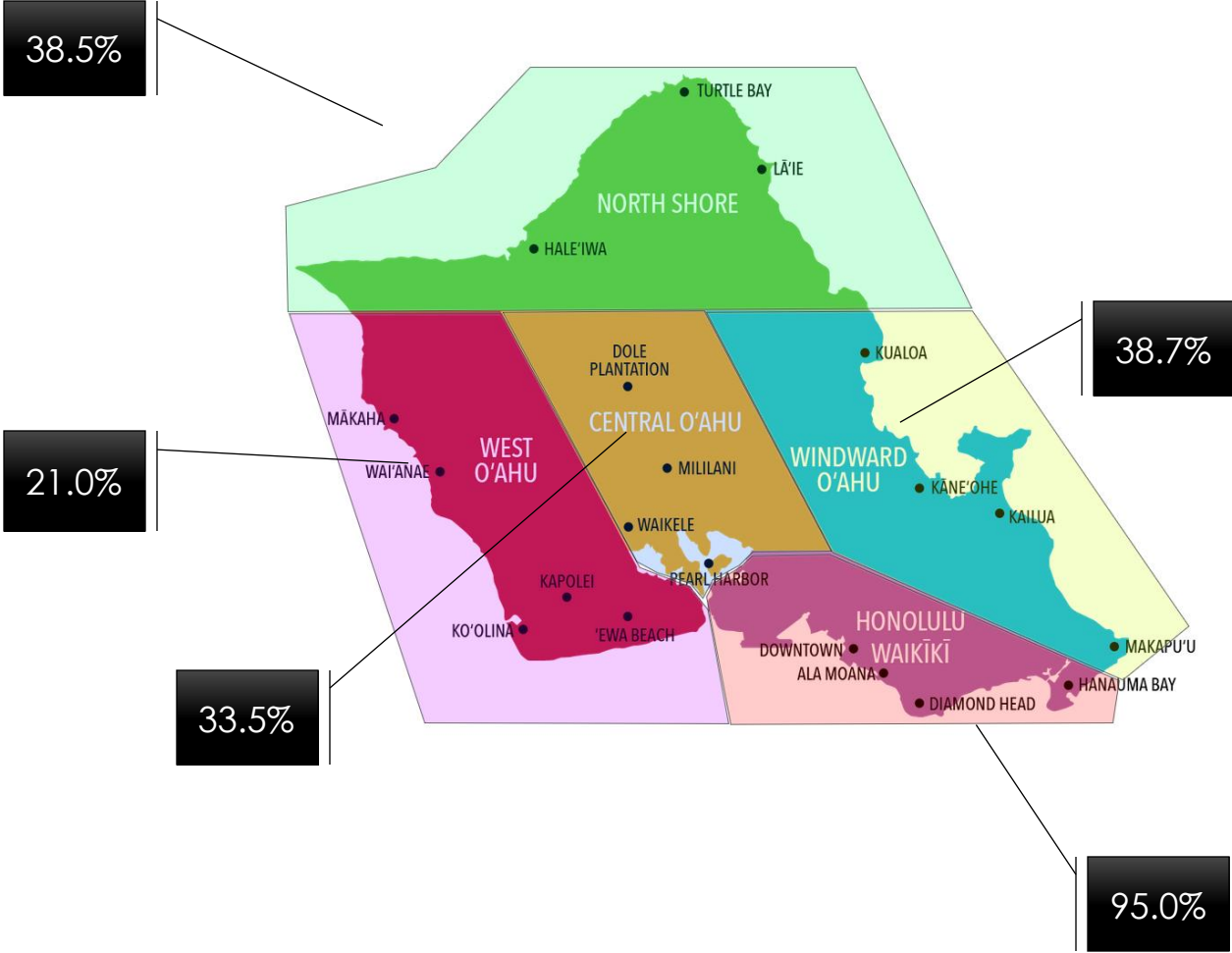
AREAS VISITED O'AHU U.S. WEST



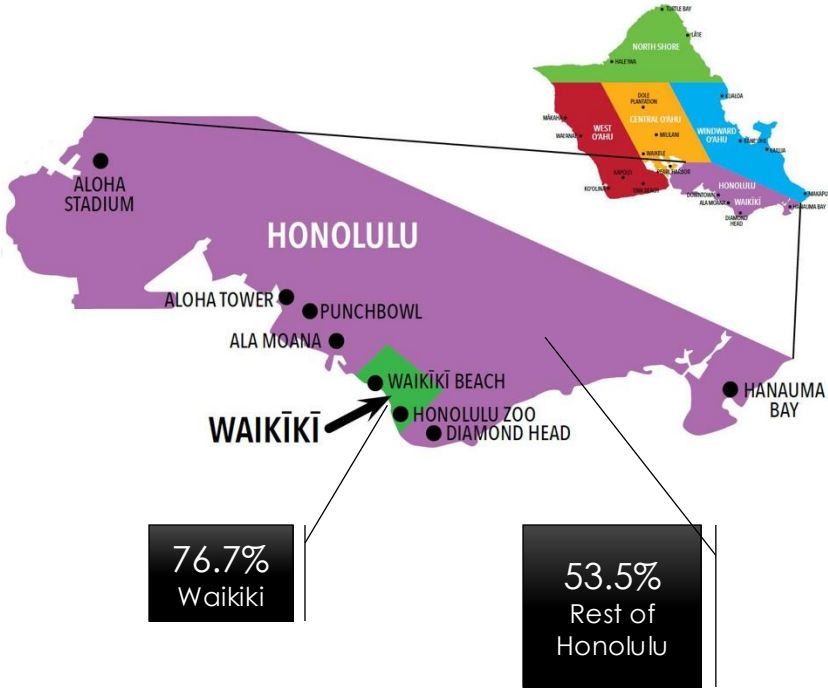
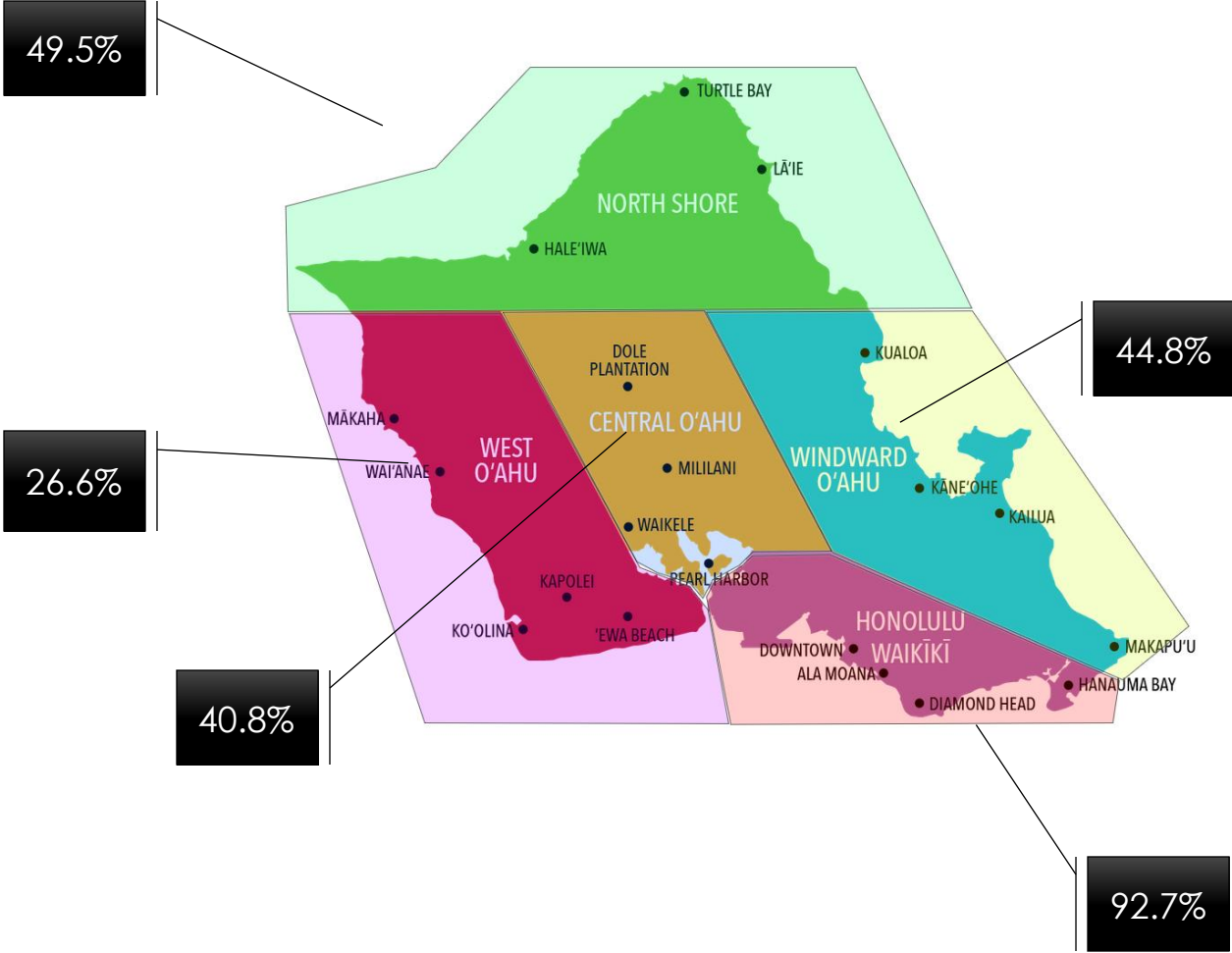
AREAS VISITED O'AHU U.S. EAST



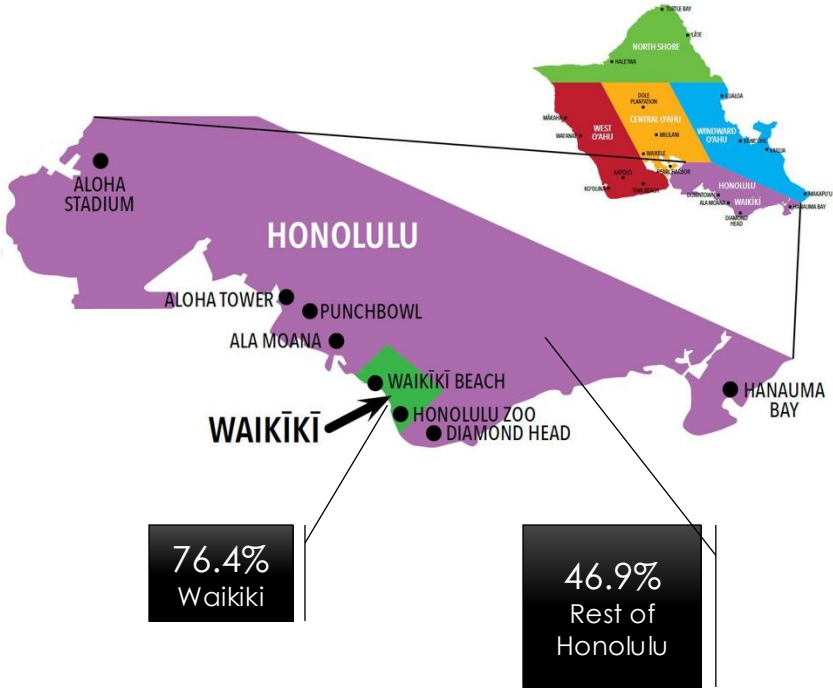
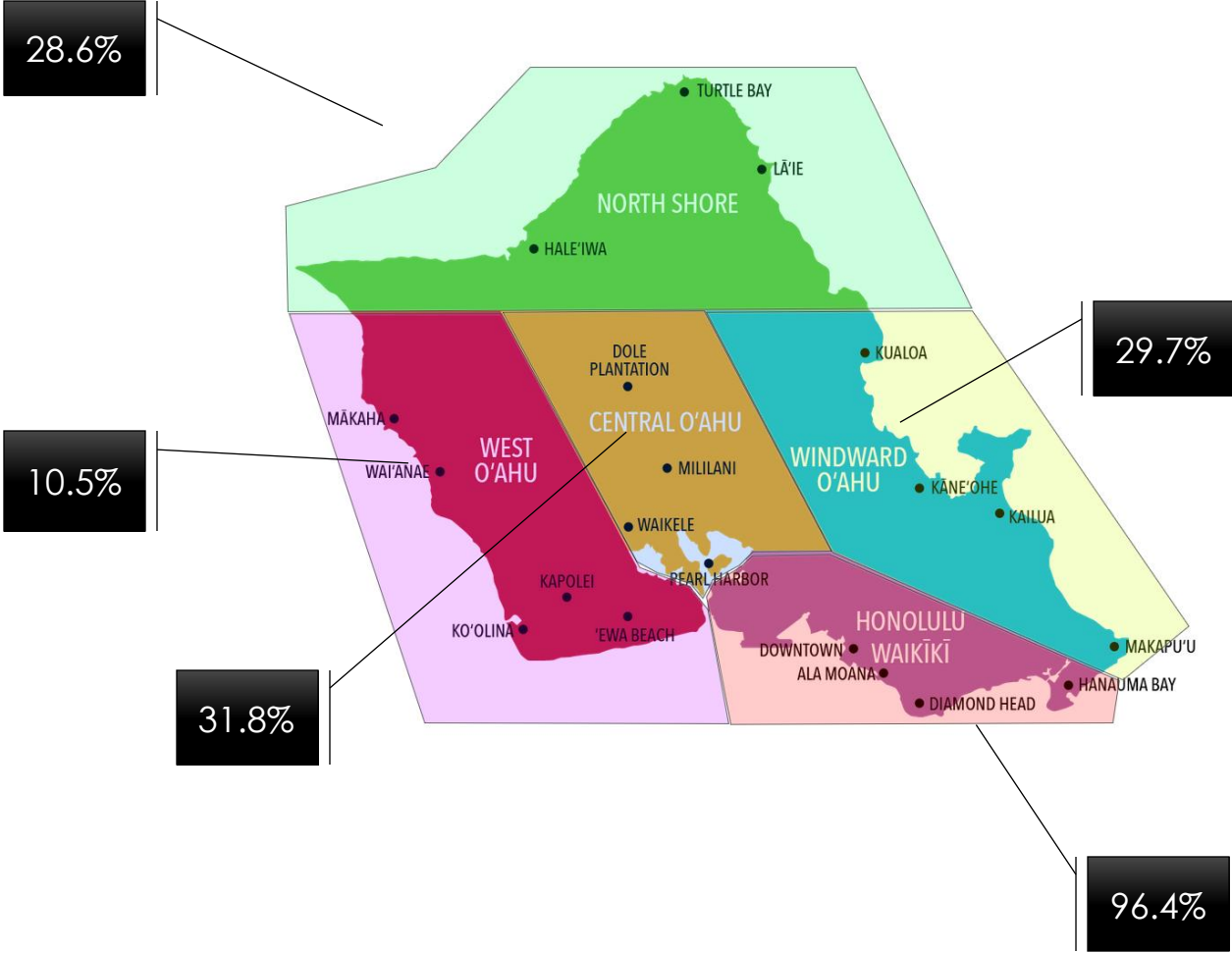
AREAS VISITED O'AHU JAPAN



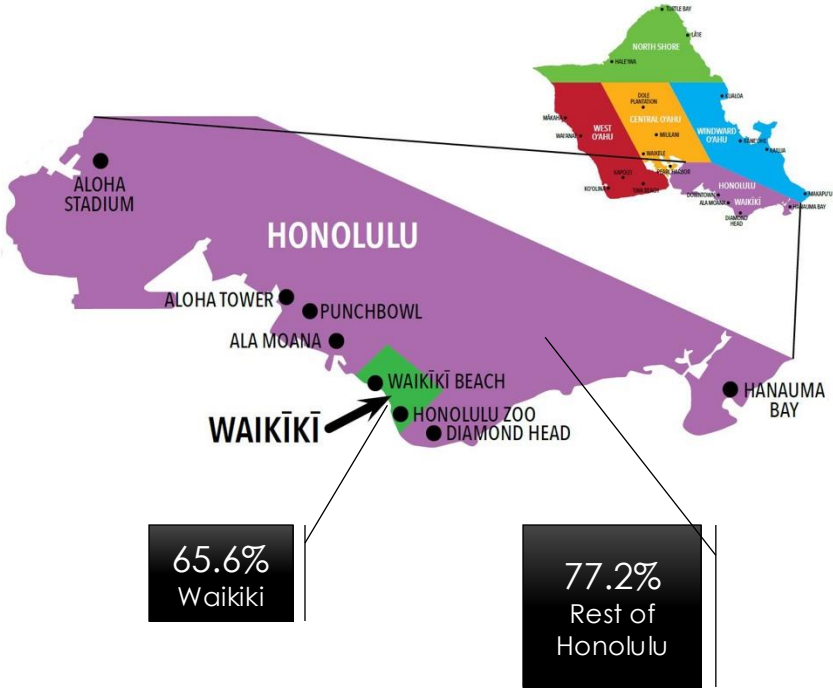
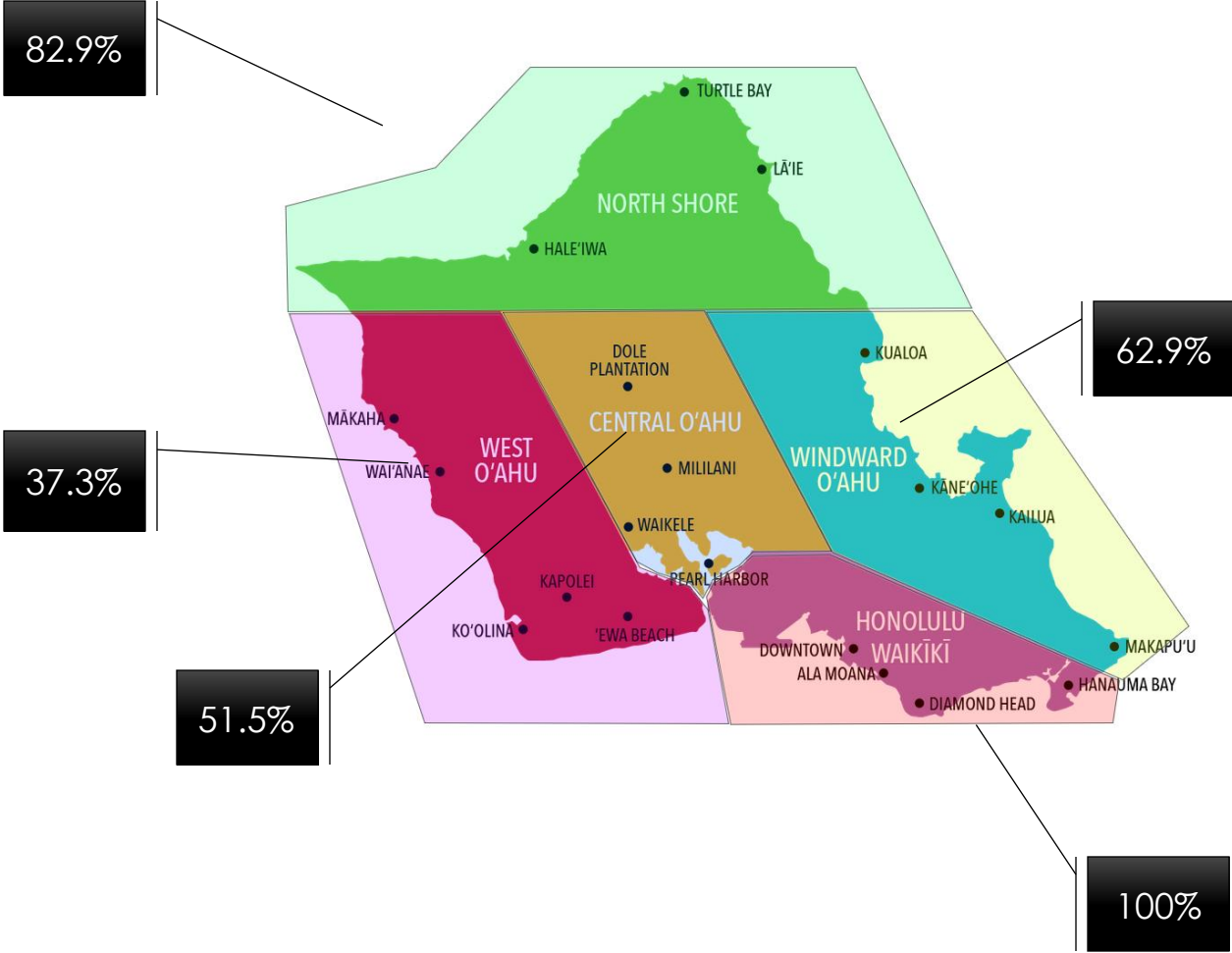
AREAS VISITED O'AHU CANADA



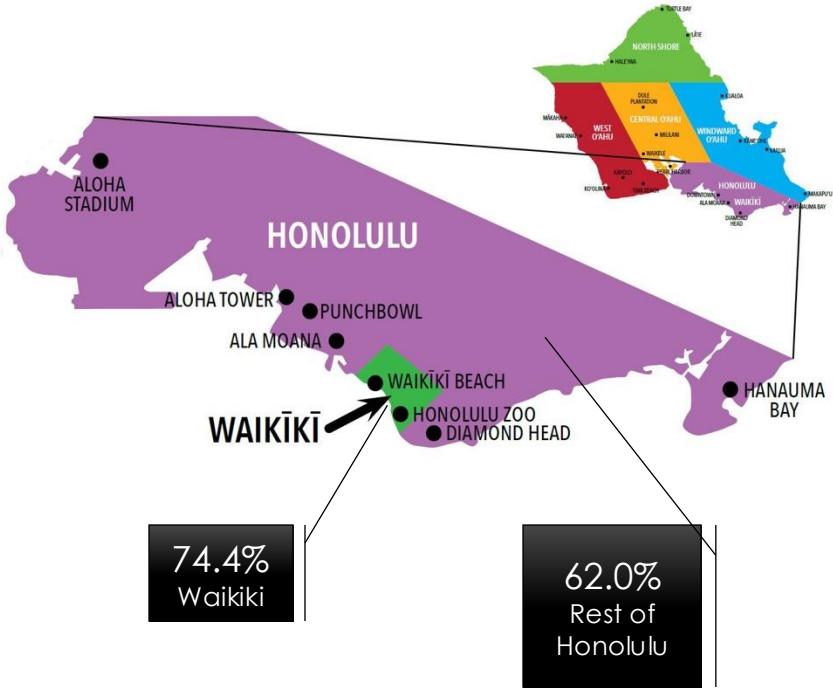
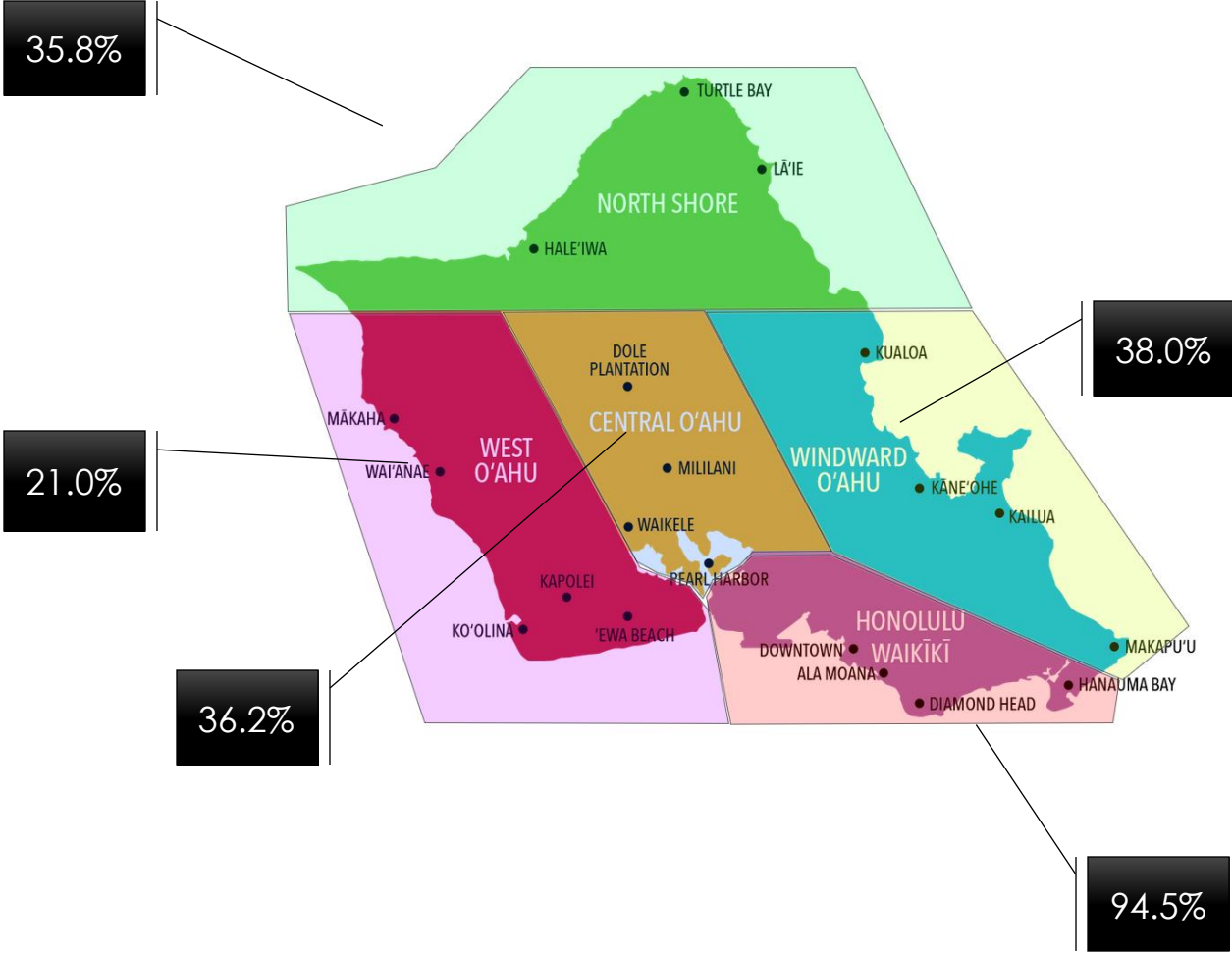
AREAS VISITED O'AHU OCEANIA



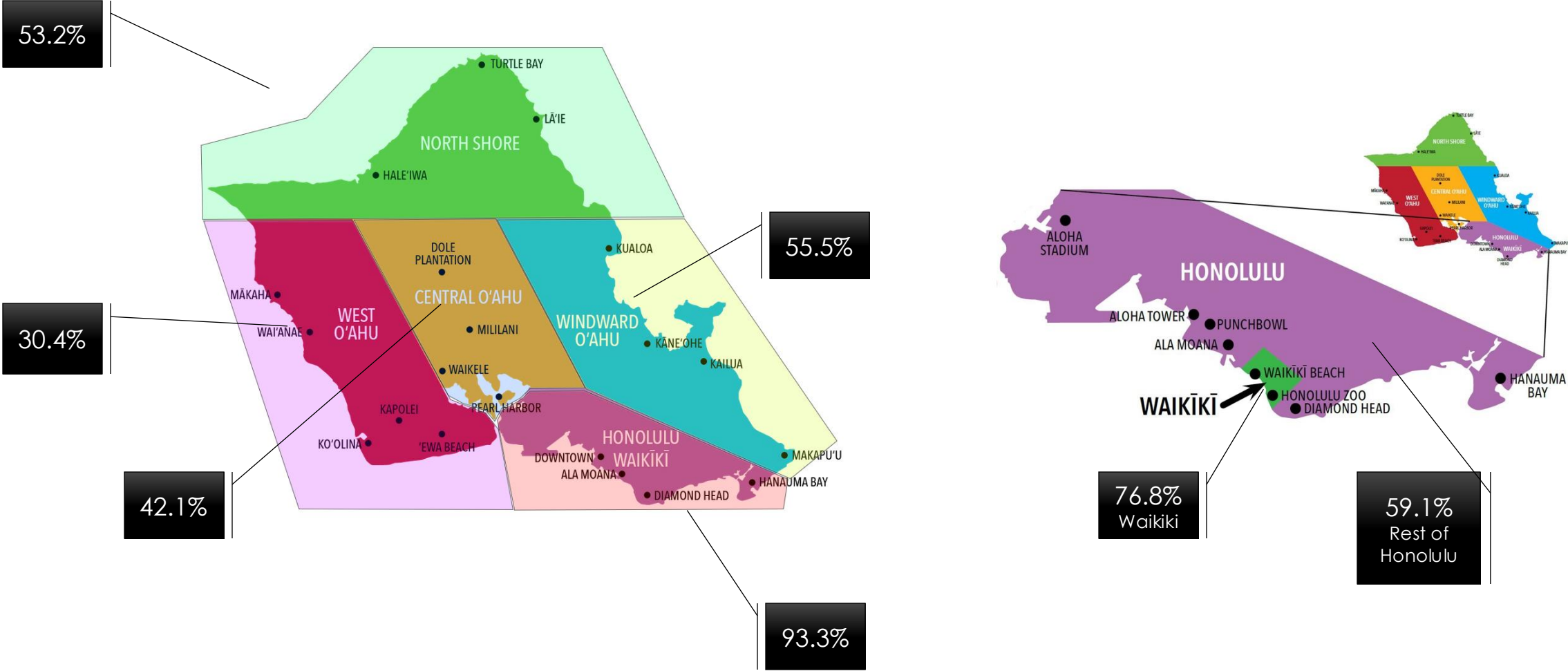
AREAS VISITED O'AHU CHINA



AREAS VISITED O'AHU KOREA



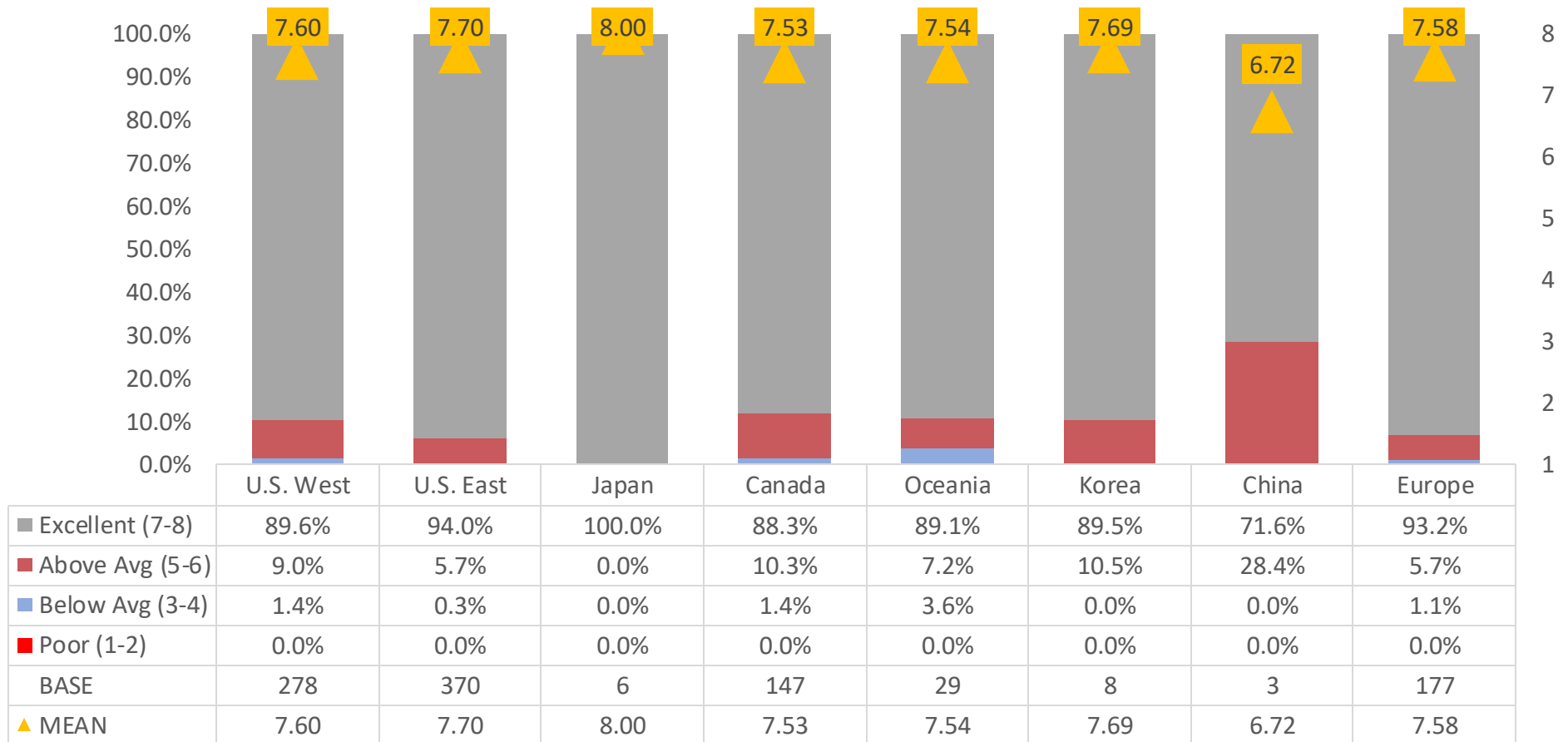
AREAS VISITED O'AHU EUROPE



Section 6 – Kaua‘i

SATISFACTION - KAUA'I

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

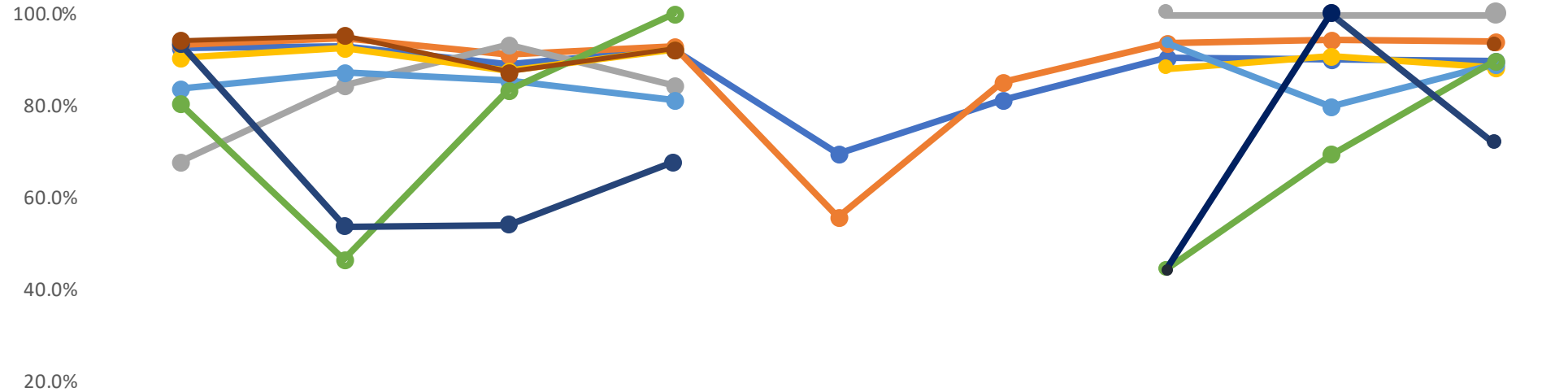


SATISFACTION - KAUA'I

- **Gender:** Female respondents from **U.S. West** expressed higher levels of satisfaction compared to male respondents from this visitor market.
- **Islands visited:** Visitors from **U.S. West** whose trip consisted of staying on just Kaua'i gave the island higher mean satisfaction scores than those who also visited one or more of the other islands during their stay.

SATISFACTION - KAUA'I

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



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Q3 2024 P
U.S. West	92.6%	92.9%	89.1%	92.0%	69.4%	81.2%	90.4%	89.9%	89.6%
U.S. East	93.3%	94.7%	91.1%	92.9%	55.6%	85.2%	93.6%	94.1%	94.0%
Japan	67.7%	84.4%	93.2%	84.4%			100.0%	100.0%	100.0%
Canada	90.2%	92.5%	87.4%	92.1%			88.0%	90.6%	88.3%
Oceania	83.6%	87.1%	85.4%	81.3%			93.7%	79.6%	89.1%
Korea	80.4%	46.5%	83.3%	100.0%			44.1%	69.2%	89.5%
China	93.7%	53.8%	54.0%	67.6%			44.1%	100.0%	71.6%
Europe	94.1%	95.2%	87.3%	92.3%					93.2%

P= Preliminary Data

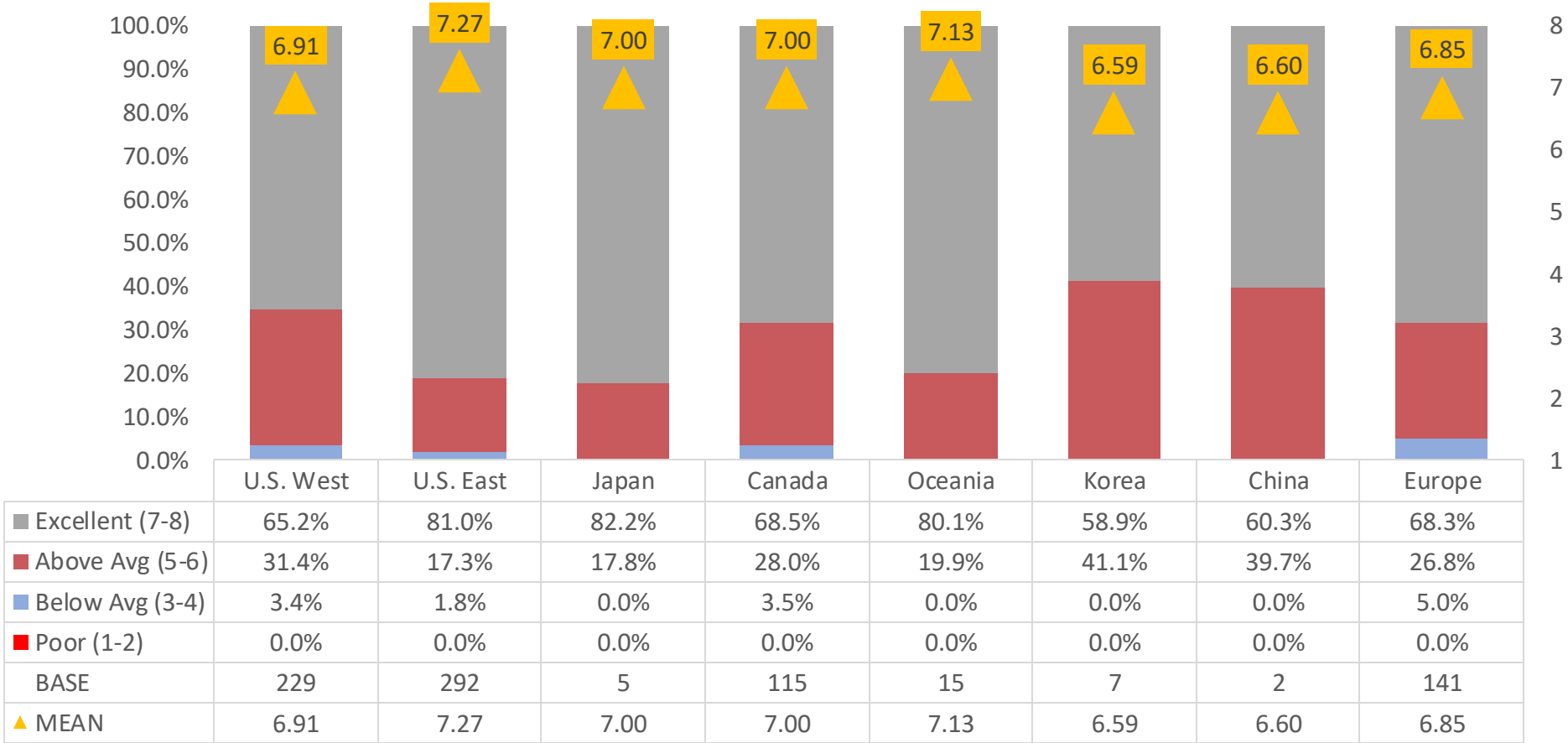
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



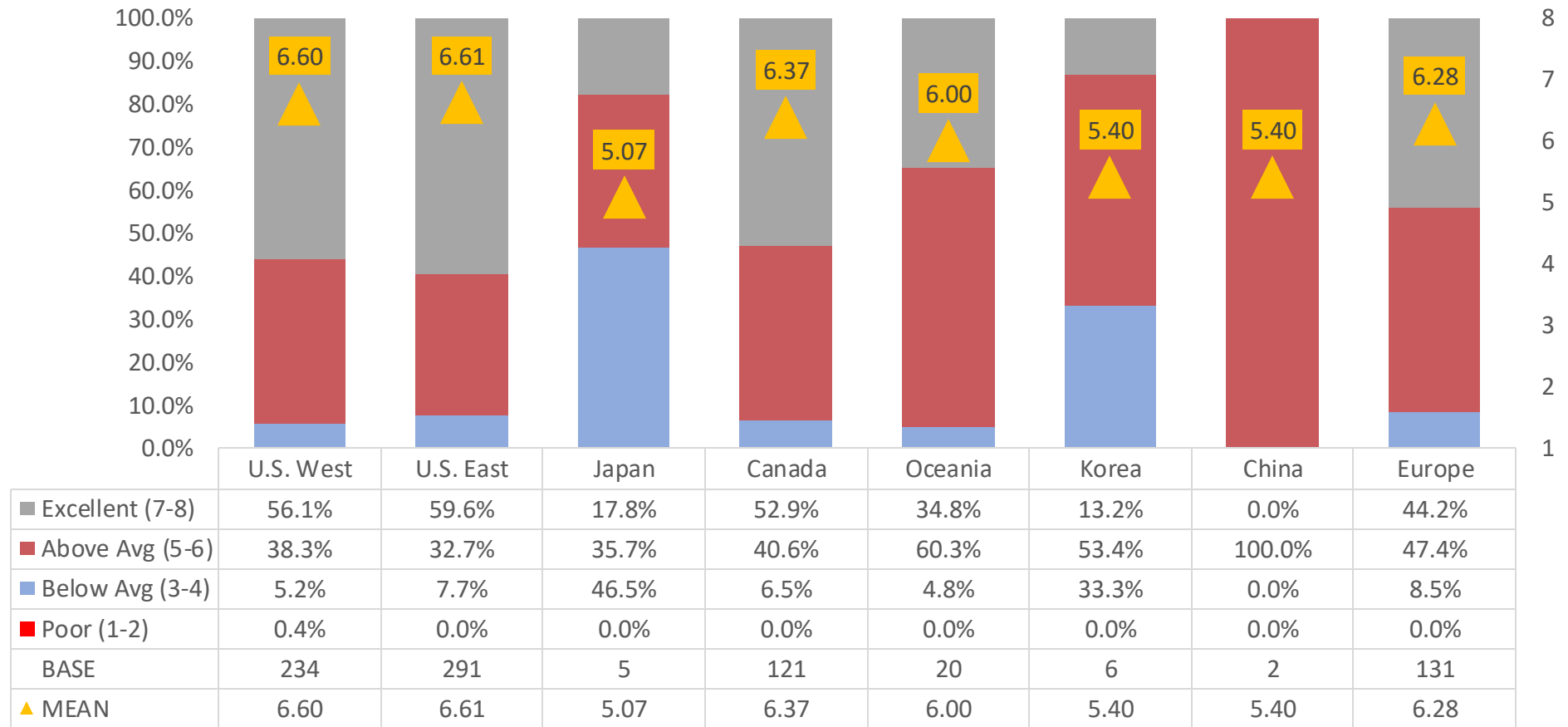
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



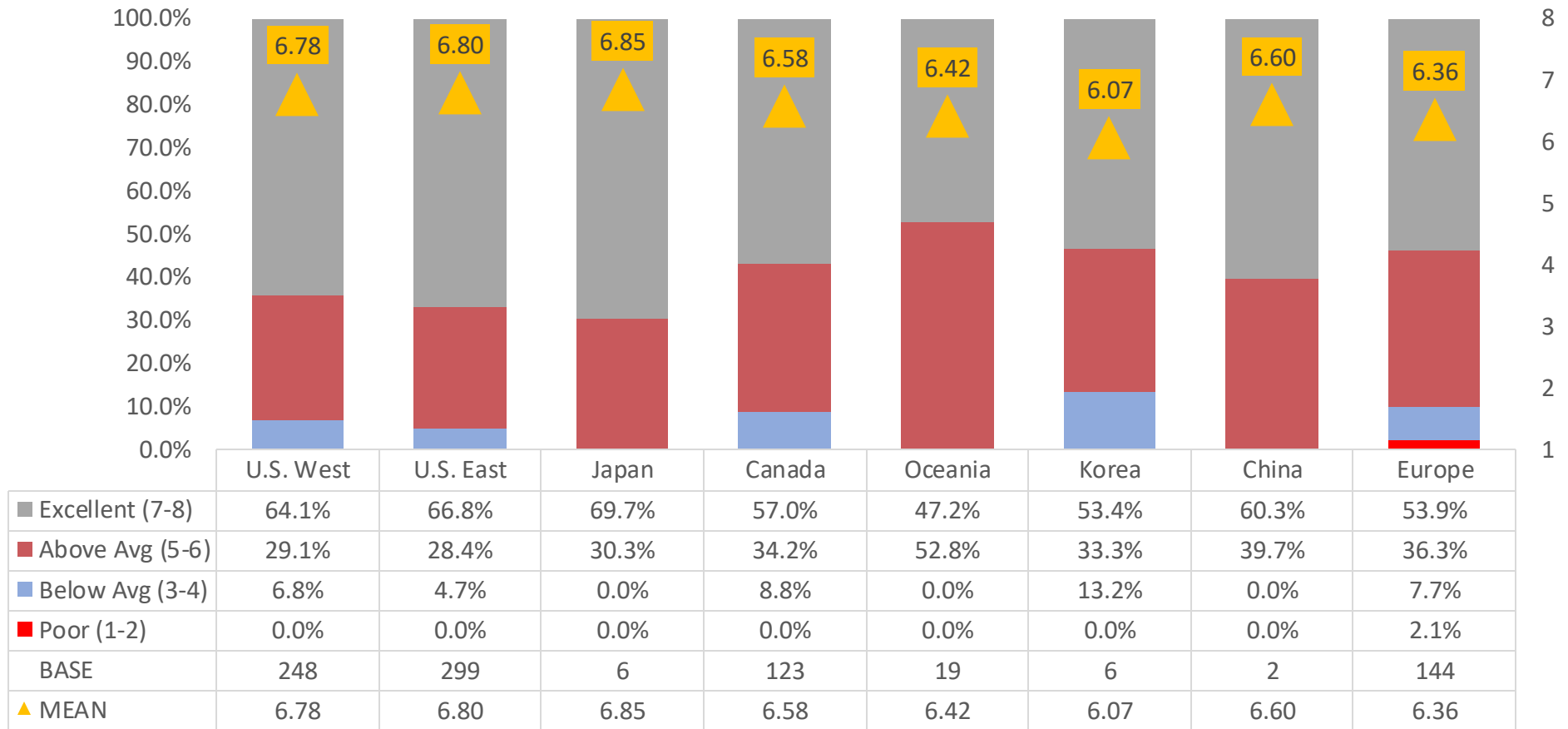
SHOPPING - KAUA'I

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



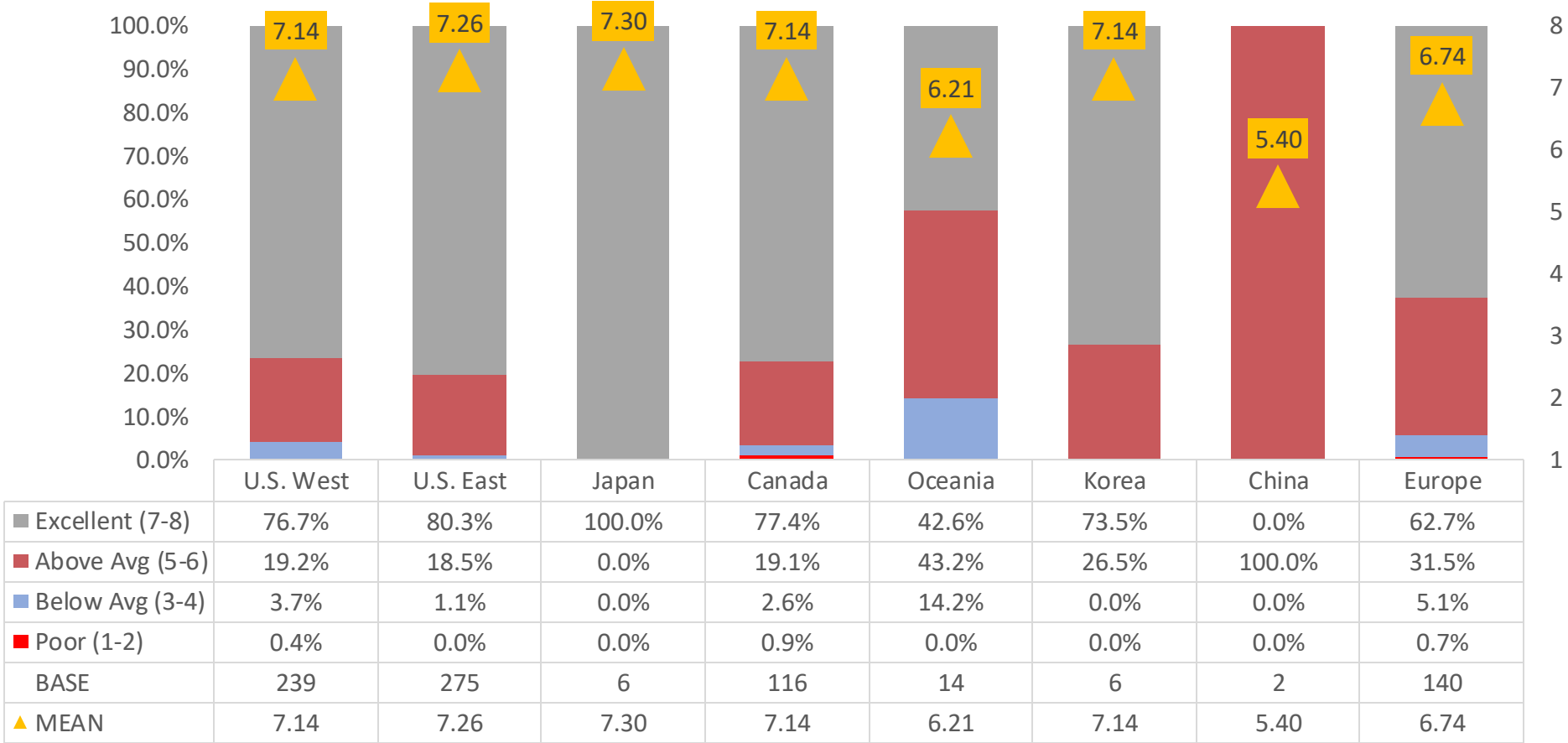
DINING/ FOOD & BEVERAGE - KAUA'I

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



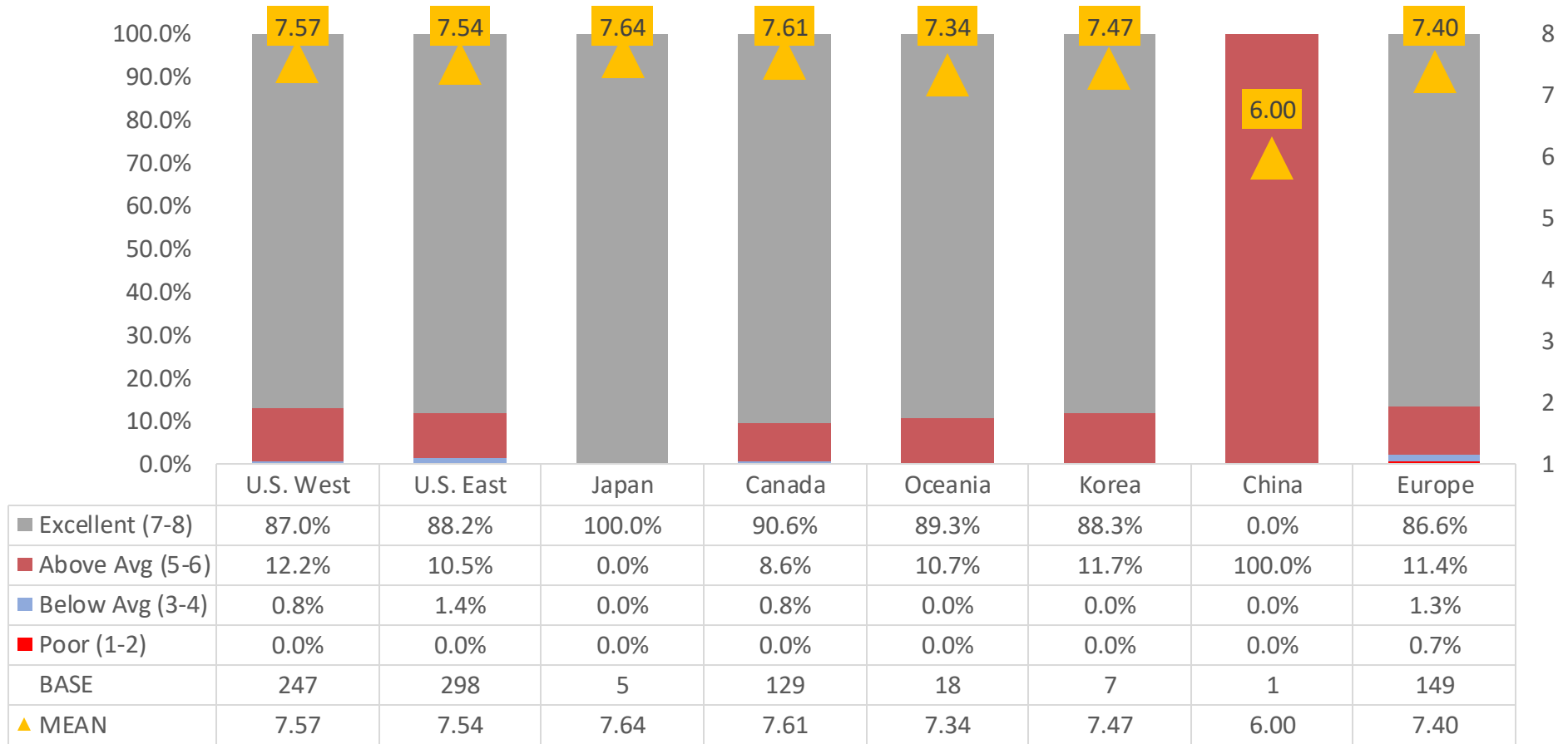
LODGING/ ACCOMMODATIONS - KAUA'I

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



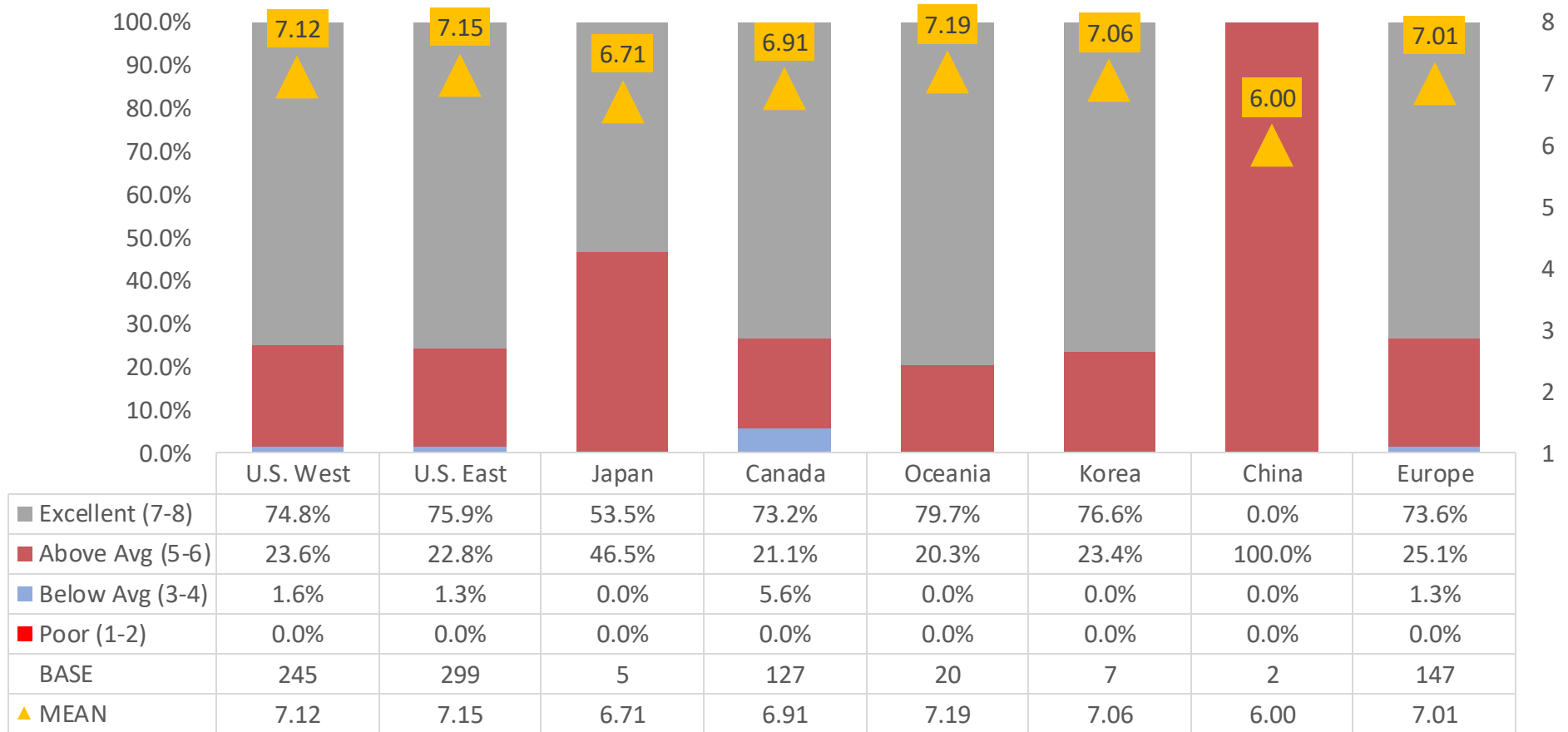
BEACHES - KAUA'I

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



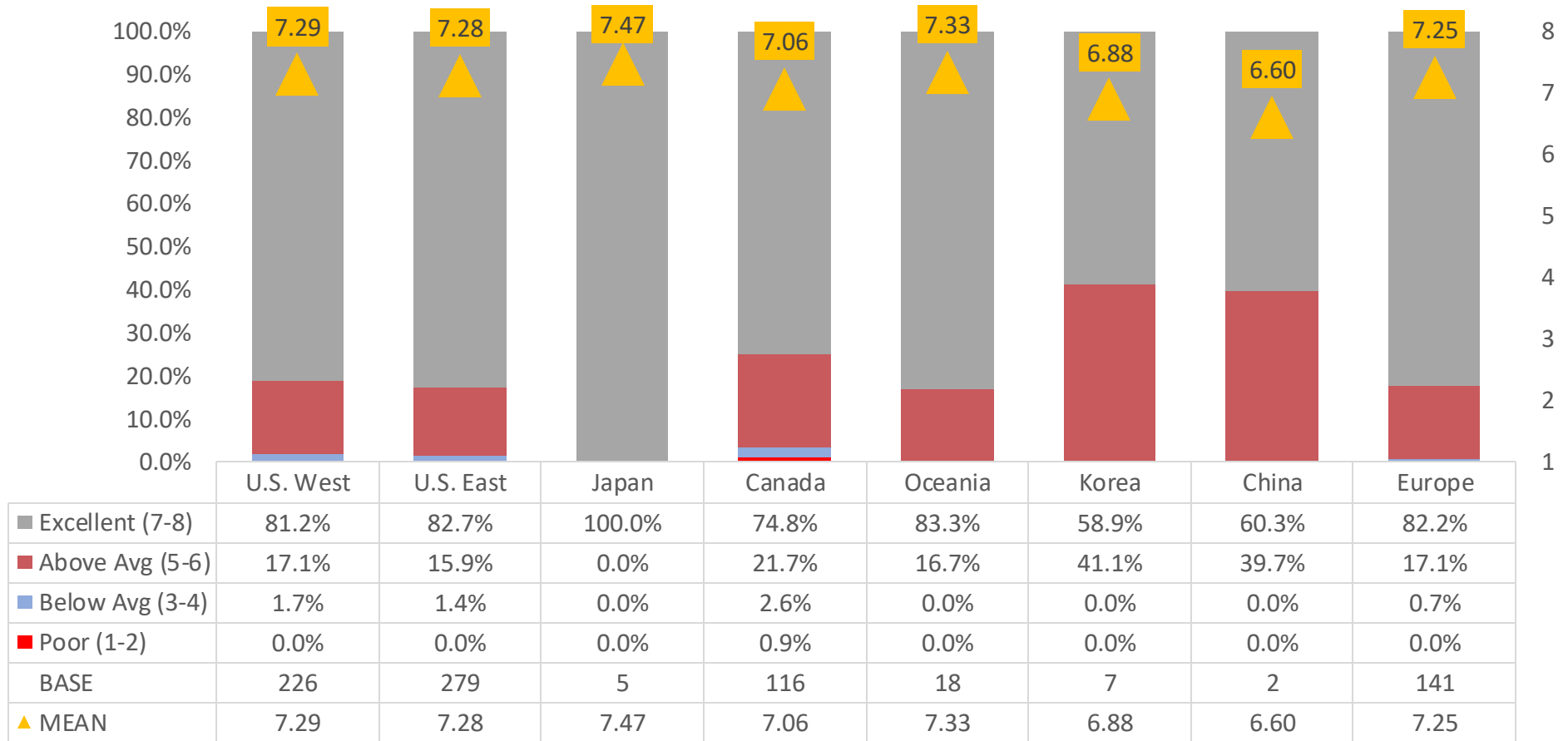
PUBLIC AREAS - KAUA'I

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



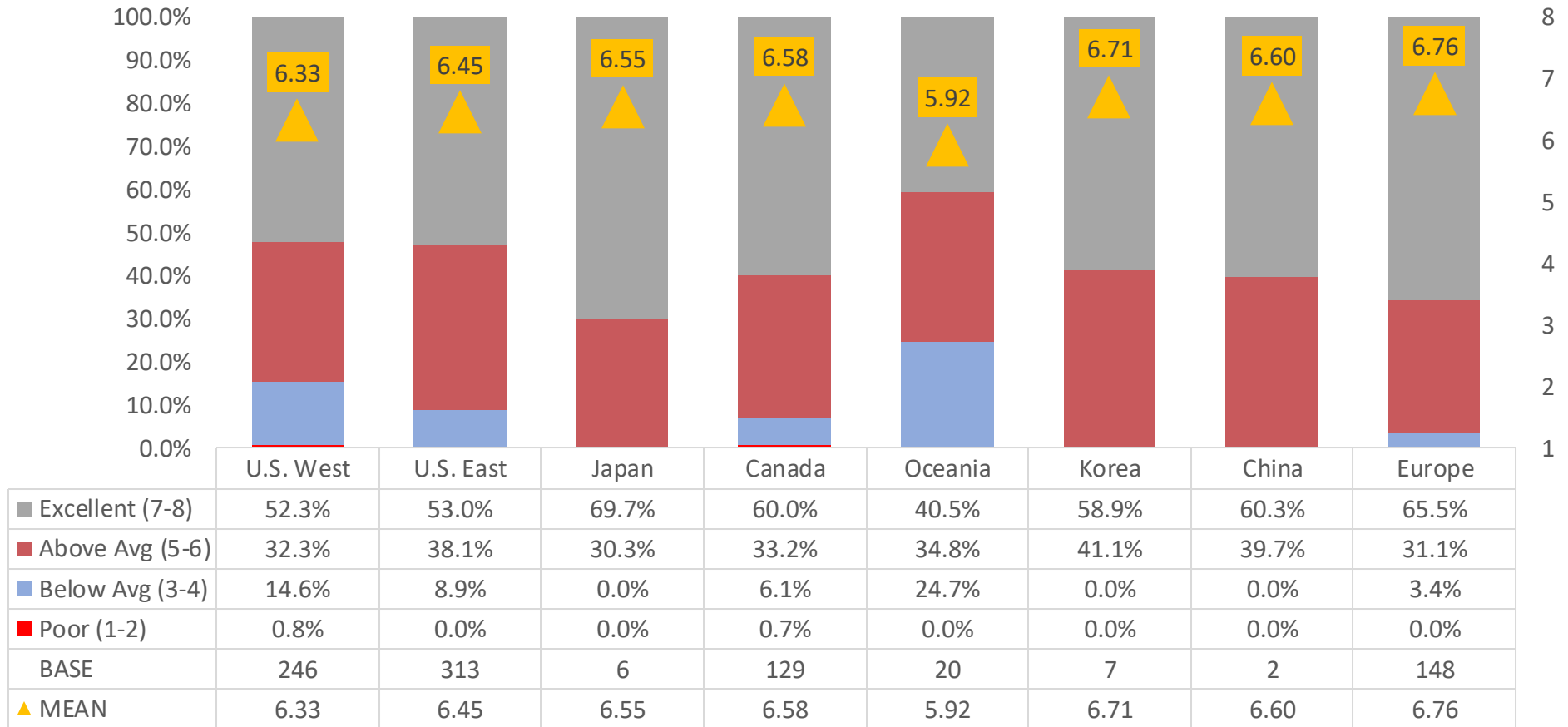
PARKS - KAUA'I

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



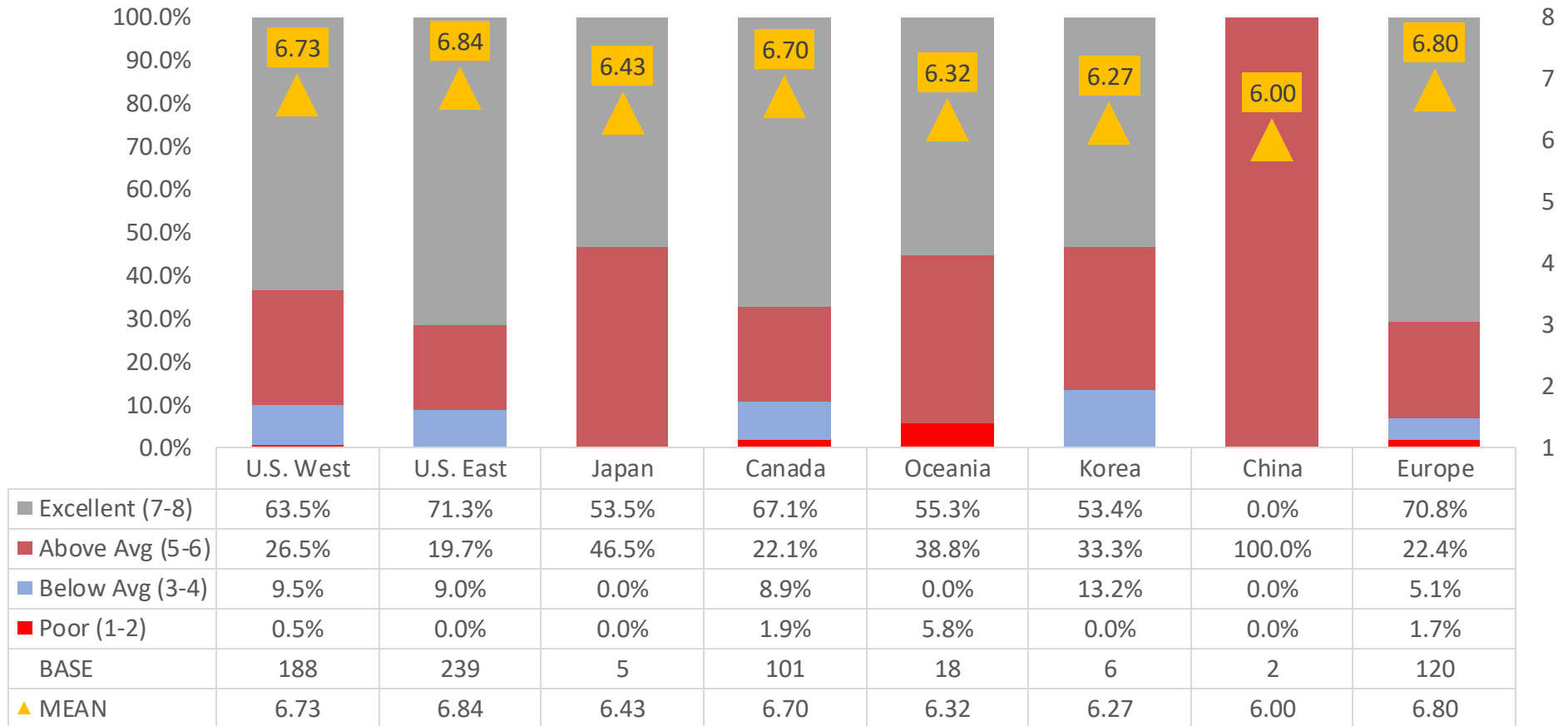
ROADS - KAUA'I

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



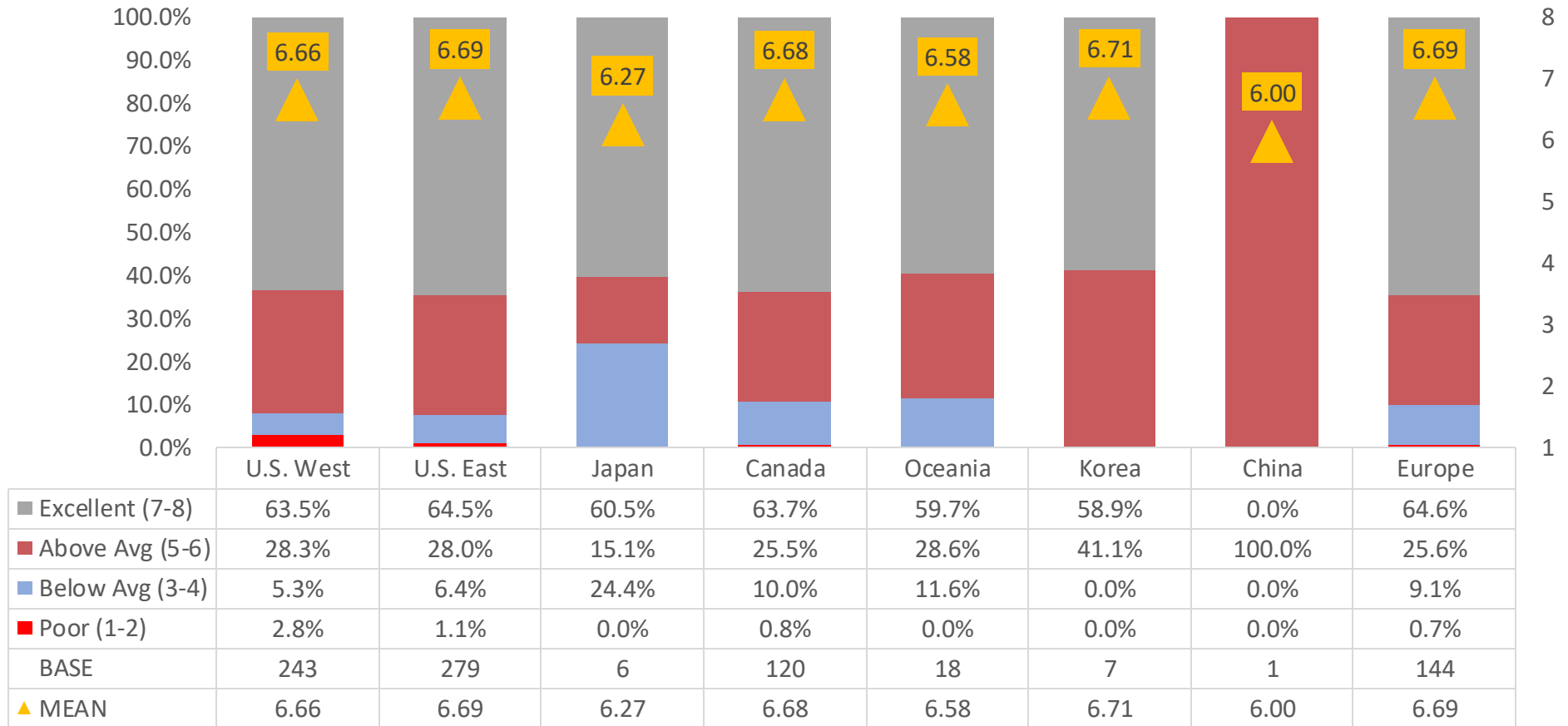
TRANSPORTATION ON ISLAND - KAUA'I

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



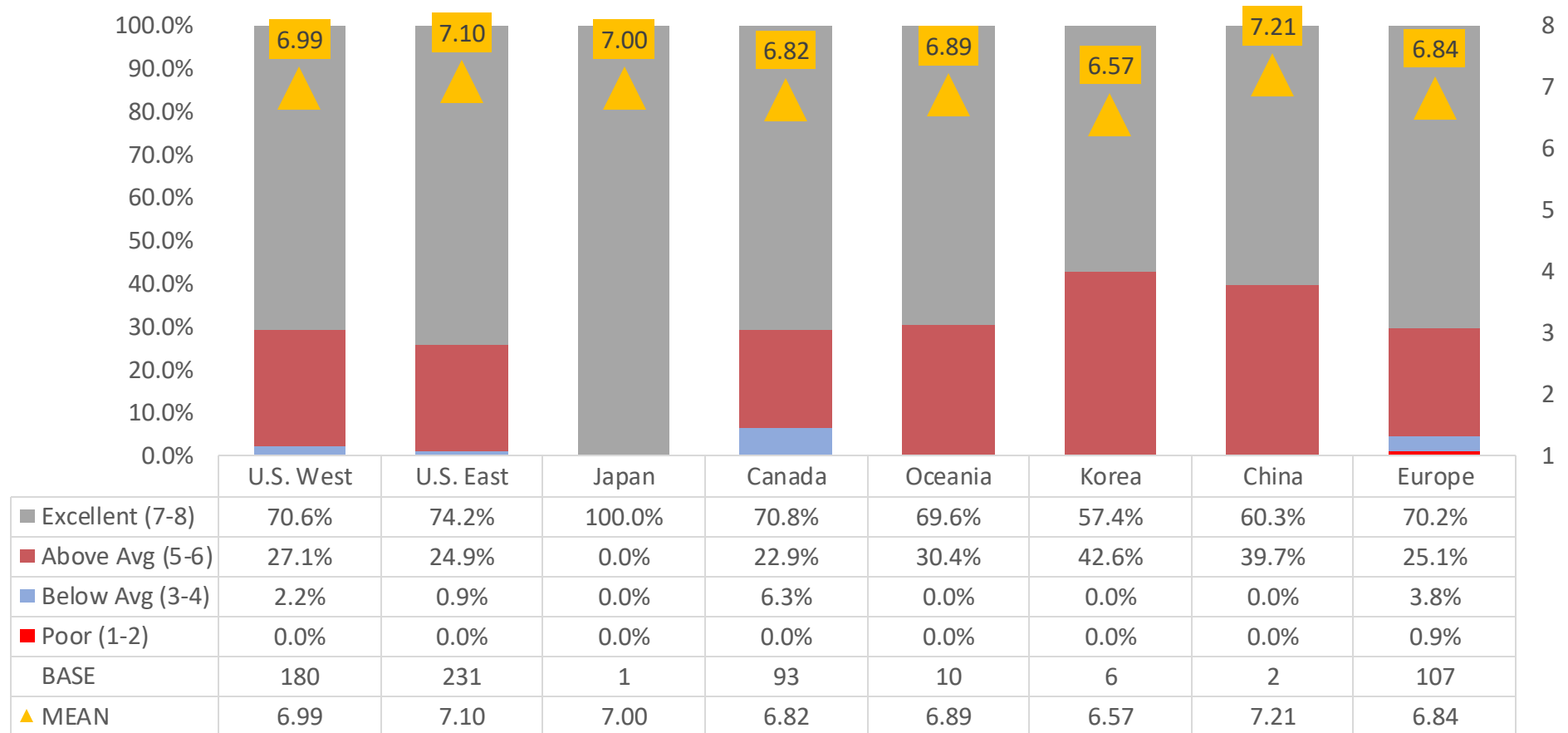
AIRPORT- KAUA'I

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



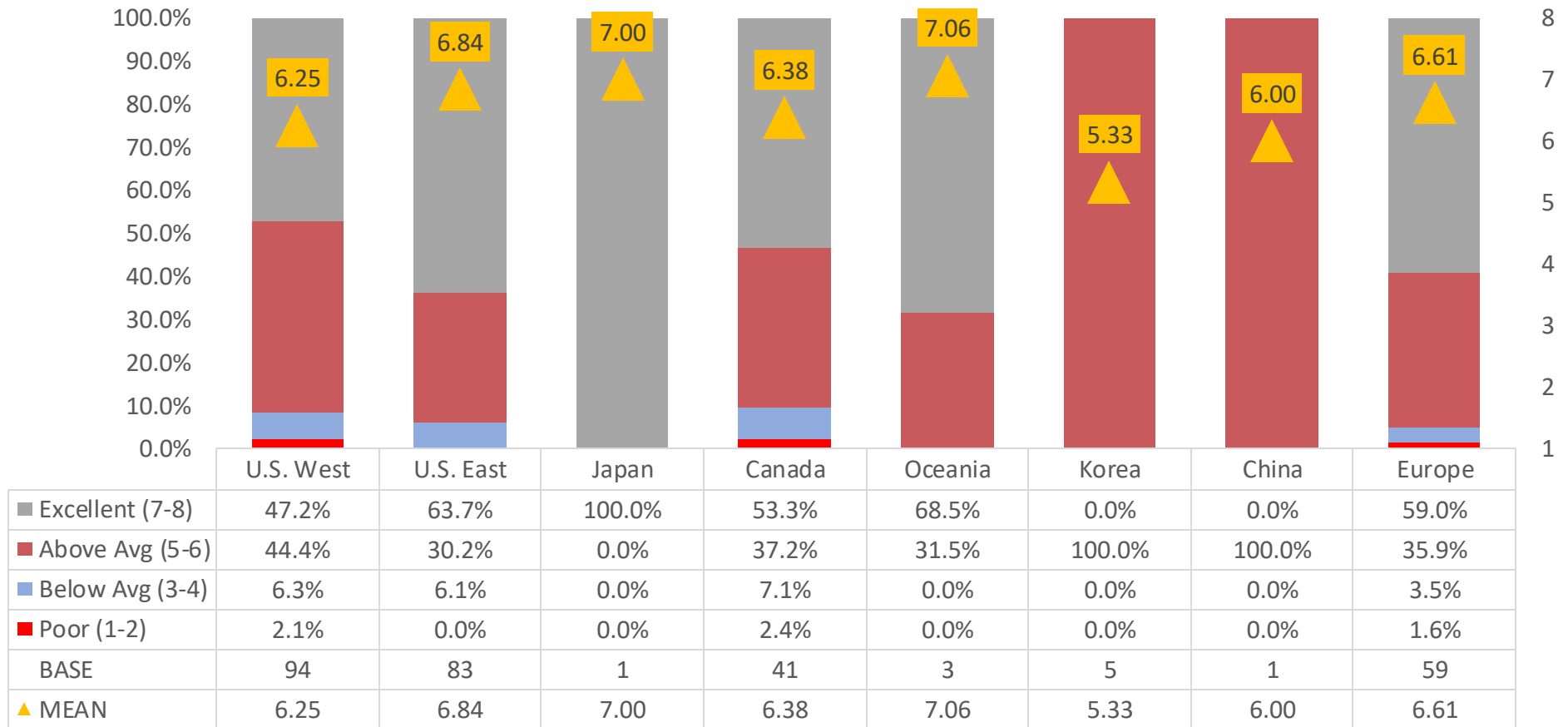
CULTURAL ACTIVITIES - KAUA'I

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



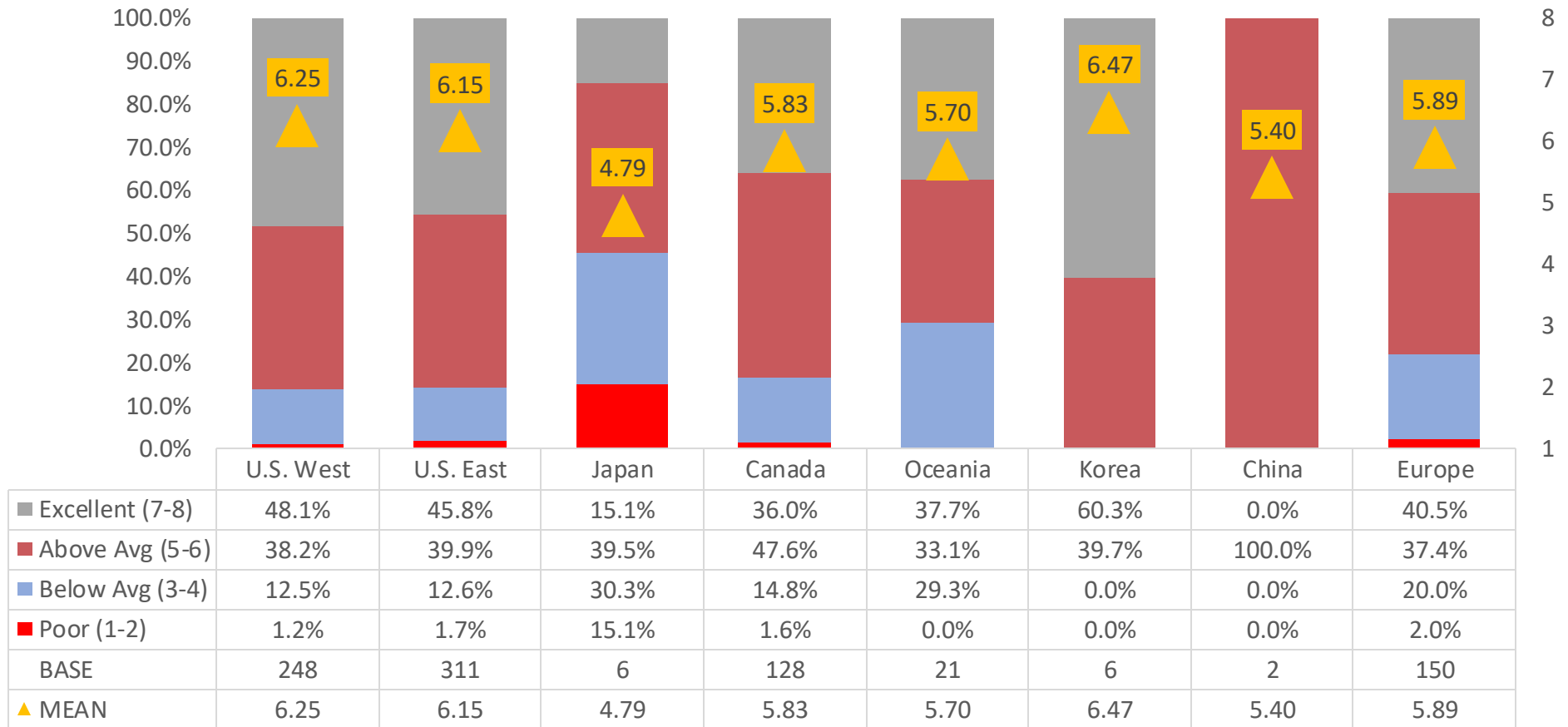
VOLUNTEER ACTIVITIES - KAUA'I

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



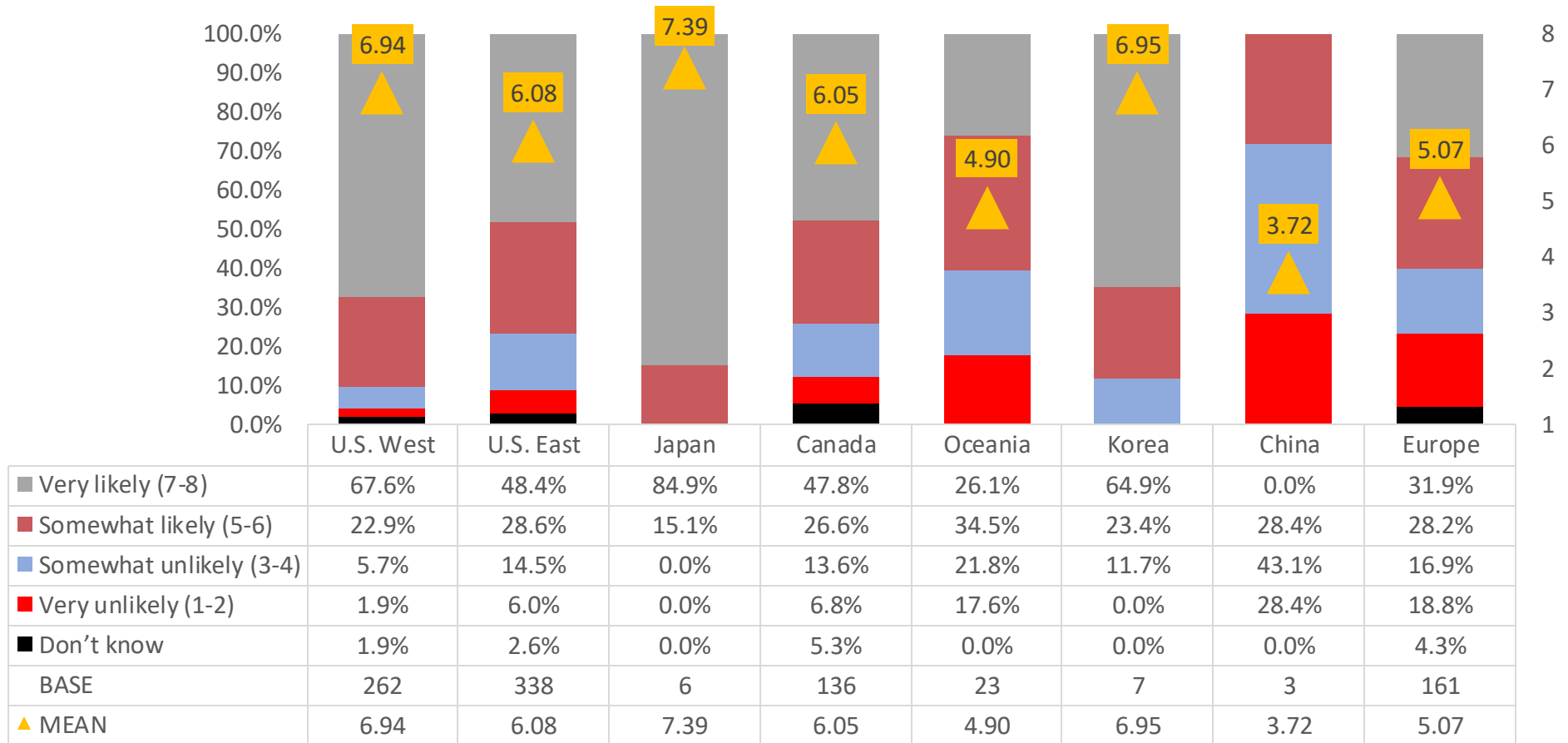
VALUE FOR THE MONEY- KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

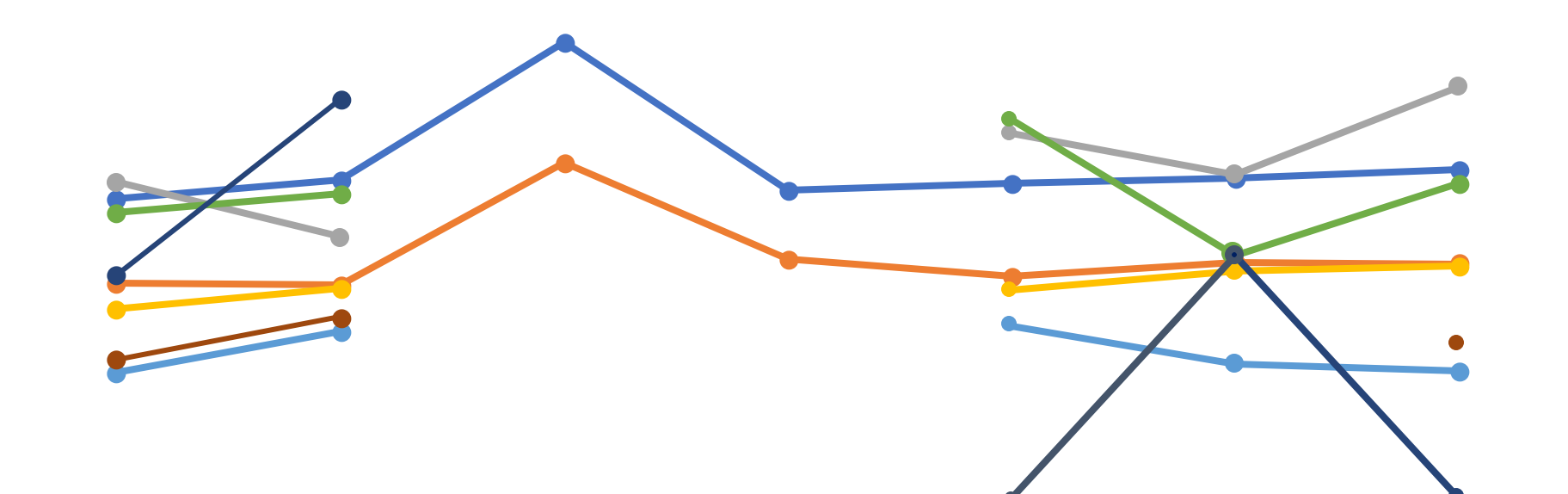
8-pt Rating Scale
8 = Very likely / 1 = Very unlikely



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

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



	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Q3 2024 P
U.S. West	61.6%	65.7%	93.8%	63.3%	65.0%	65.9%	67.6%
U.S. East	44.2%	43.8%	69.3%	49.3%	45.7%	48.7%	48.4%
Japan	65.2%	53.8%			75.0%	66.7%	84.9%
Canada	39.1%	43.2%			42.8%	46.9%	47.8%
Oceania	26.0%	34.3%			35.6%	27.8%	26.1%
Korea	58.7%	62.8%			78.0%	50.0%	64.9%
China	46.0%	82.1%			0.0%	50.0%	0.0%
Europe	28.7%	37.3%					31.9%

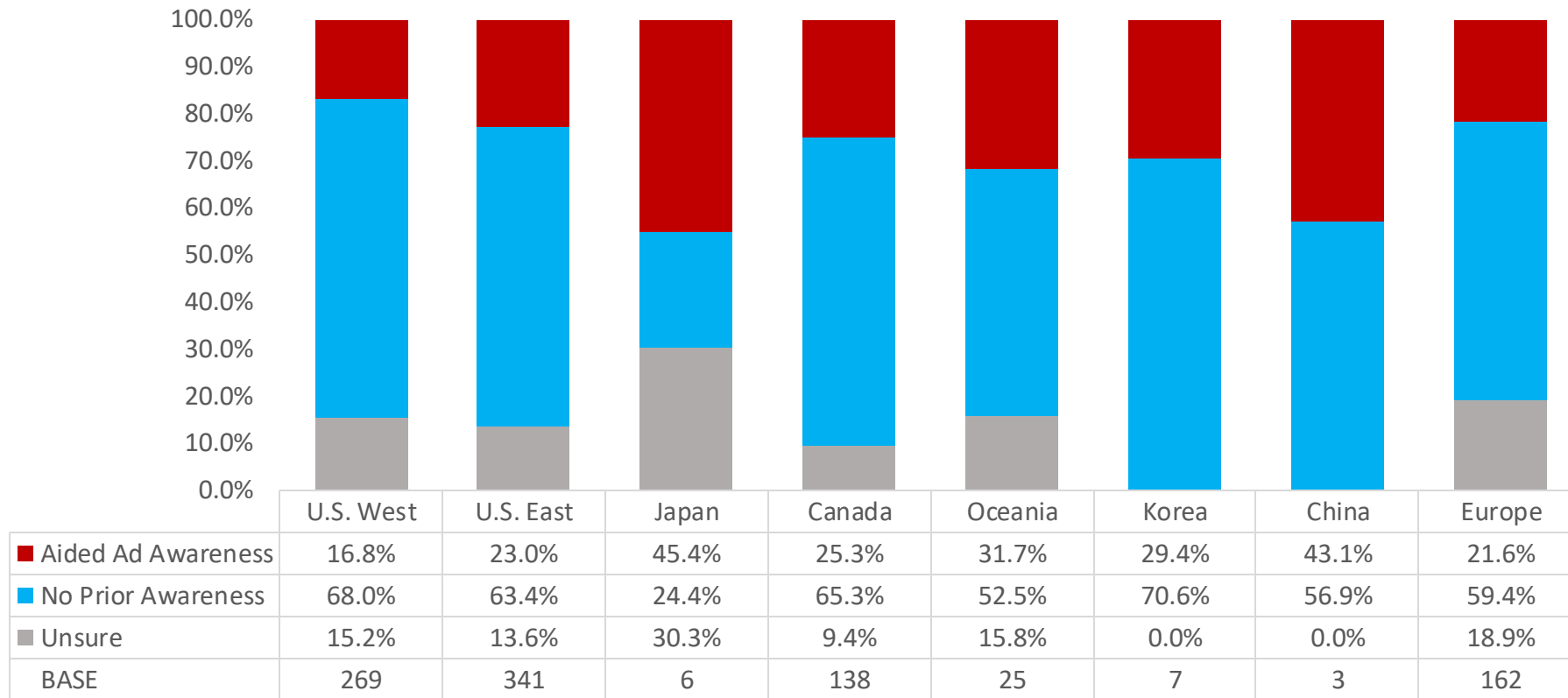
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



AIDED ADVERTISING AWARENESS - KAUA'I

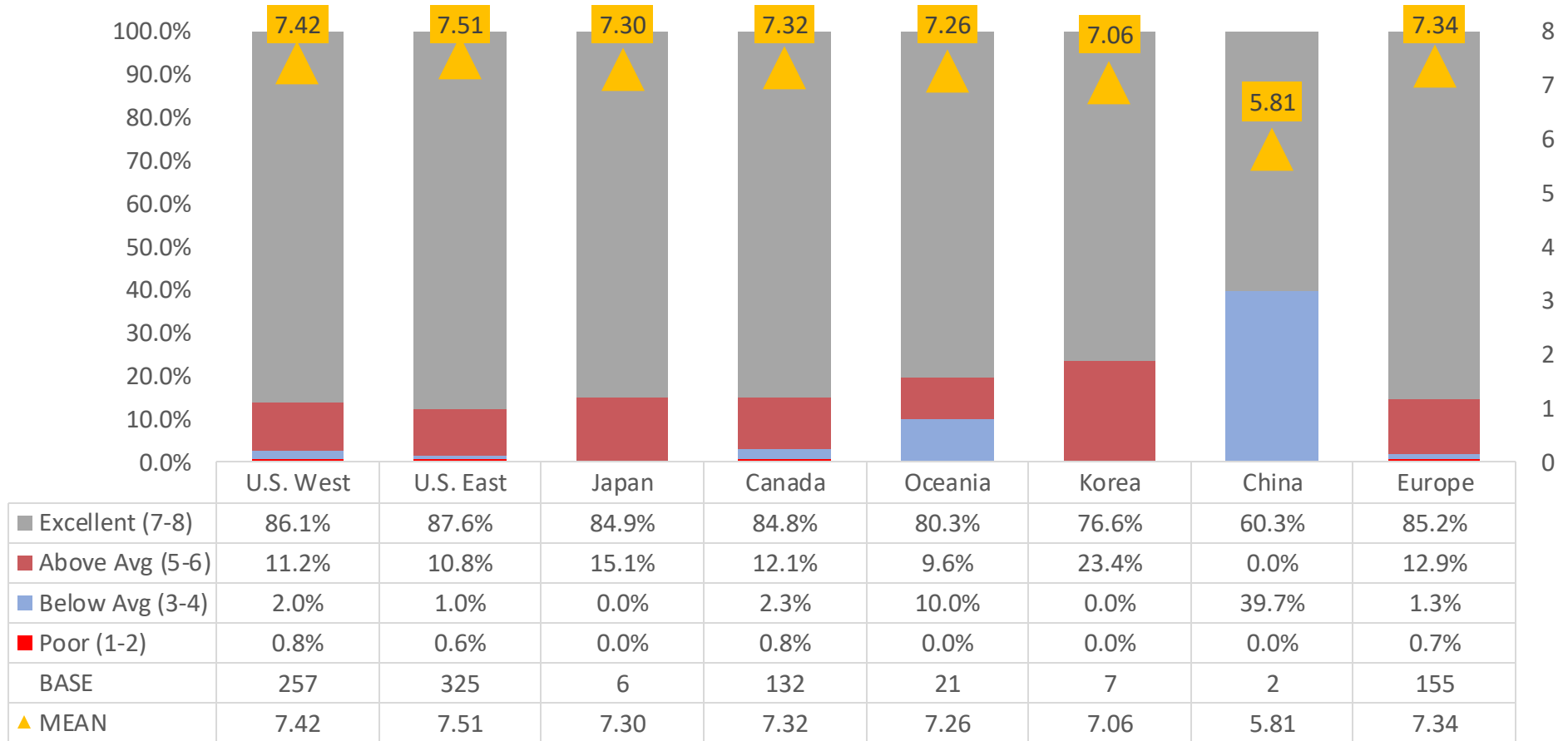


MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	50.2%	49.8%	45.4%	53.1%	44.0%	28.4%	35.1%	57.9%
Outdoor or sporting activities and events	17.0%	15.9%	24.4%	18.1%	16.2%	0.0%	17.7%	27.2%
Social media posts and videos	9.8%	10.3%	0.0%	14.8%	7.8%	71.6%	29.4%	16.0%
Hawaiian cultural events	6.8%	8.5%	15.1%	7.4%	0.0%	0.0%	0.0%	6.2%
Television programs or movies filmed in Hawai'i	6.0%	5.3%	30.3%	11.6%	15.5%	0.0%	0.0%	12.4%
Hawaiian music	4.5%	3.8%	0.0%	2.9%	0.0%	0.0%	17.7%	0.6%
BASE	269	341	6	138	25	3	7	162

FRIENDLINESS OF KAUA‘I RESIDENTS

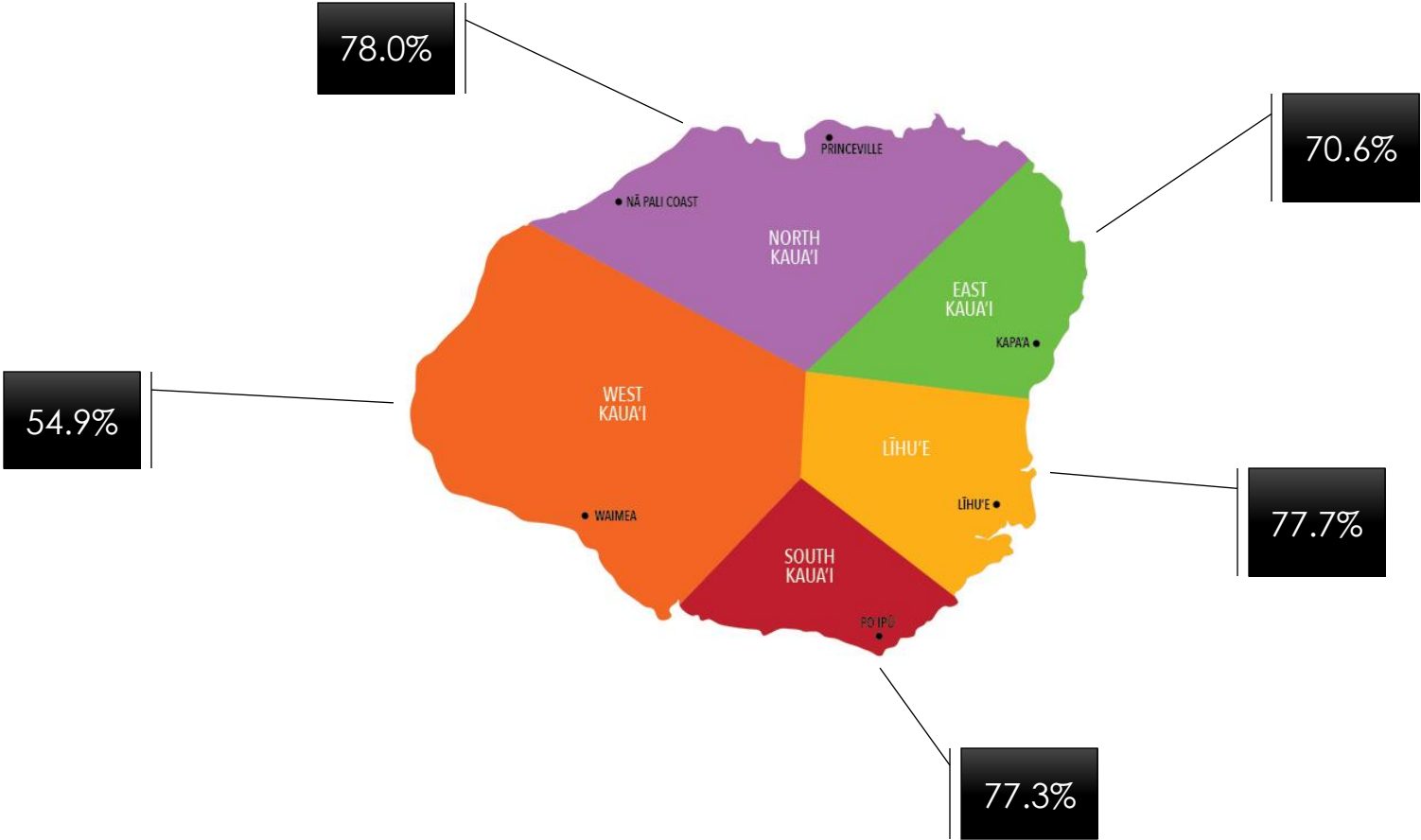
8-pt Rating Scale
8=Excellent / 1=Poor



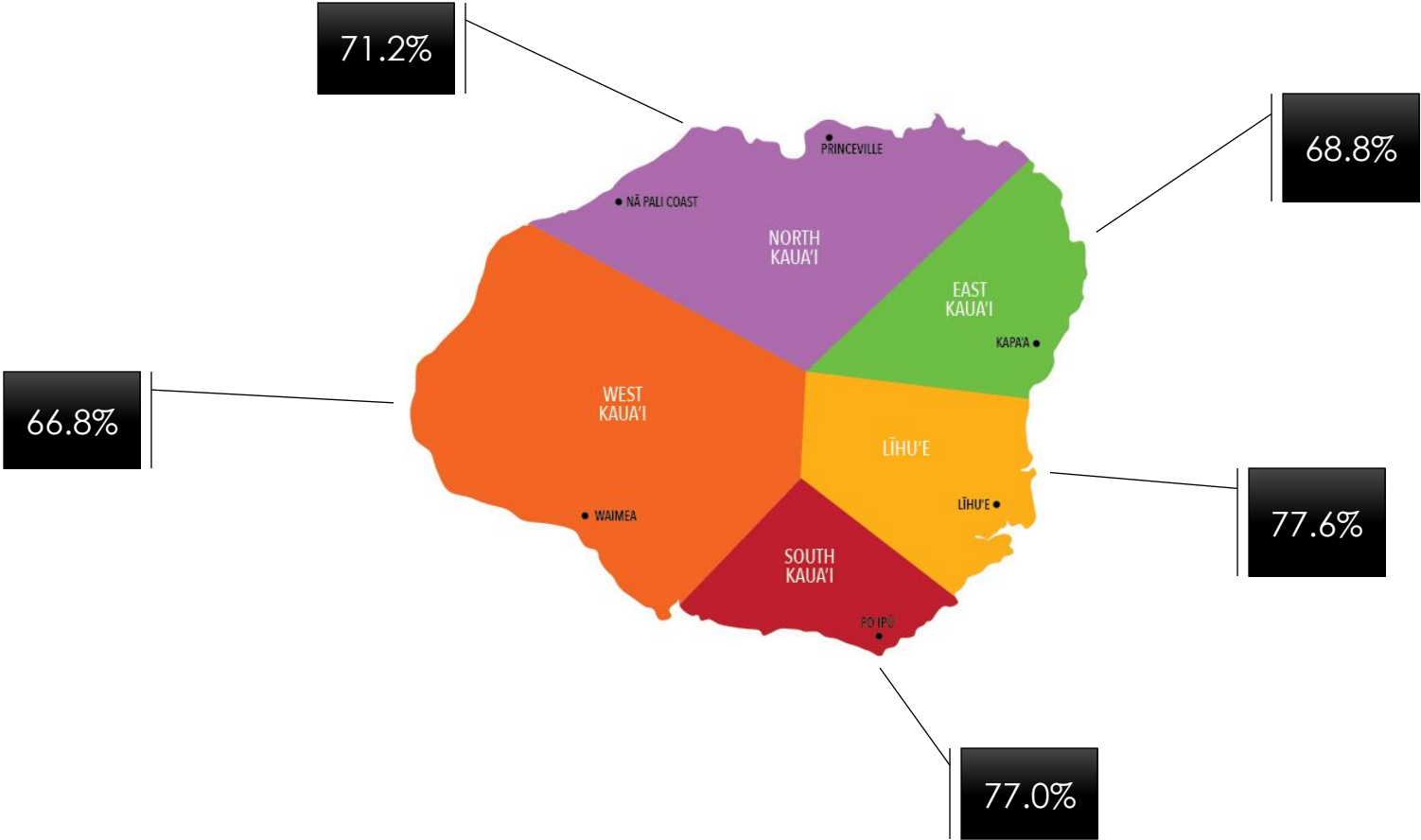
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	46.6%	30.3%	30.3%	26.0%	18.4%	39.7%	0.0%	11.3%
Friend recommendation	29.7%	28.6%	15.1%	33.5%	34.3%	0.0%	35.5%	24.1%
Cruise line stop/part of tour	2.4%	10.6%	0.0%	8.6%	13.8%	60.3%	0.0%	5.3%
Visiting Family/ Friends	5.2%	4.1%	0.0%	3.1%	14.6%	0.0%	0.0%	0.7%
Attending conference/ event	3.2%	2.3%	24.4%	2.3%	0.0%	0.0%	0.0%	0.0%
Article/ Blog	1.6%	2.2%	15.1%	8.8%	9.2%	0.0%	0.0%	24.7%
Social Media Post	1.6%	2.8%	15.1%	2.3%	0.0%	0.0%	35.1%	10.7%
Own a timeshare	1.6%	3.1%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
Location/ Never been, but went to other islands	1.6%	2.9%	0.0%	3.0%	0.0%	0.0%	0.0%	1.3%
Travel Agent	0.8%	3.9%	0.0%	0.0%	5.0%	0.0%	0.0%	12.1%
Nature/ Beauty/ Scenery	0.8%	1.9%	0.0%	2.2%	4.6%	0.0%	0.0%	0.7%
Advertisement	1.2%	0.9%	0.0%	0.8%	0.0%	0.0%	11.7%	0.6%

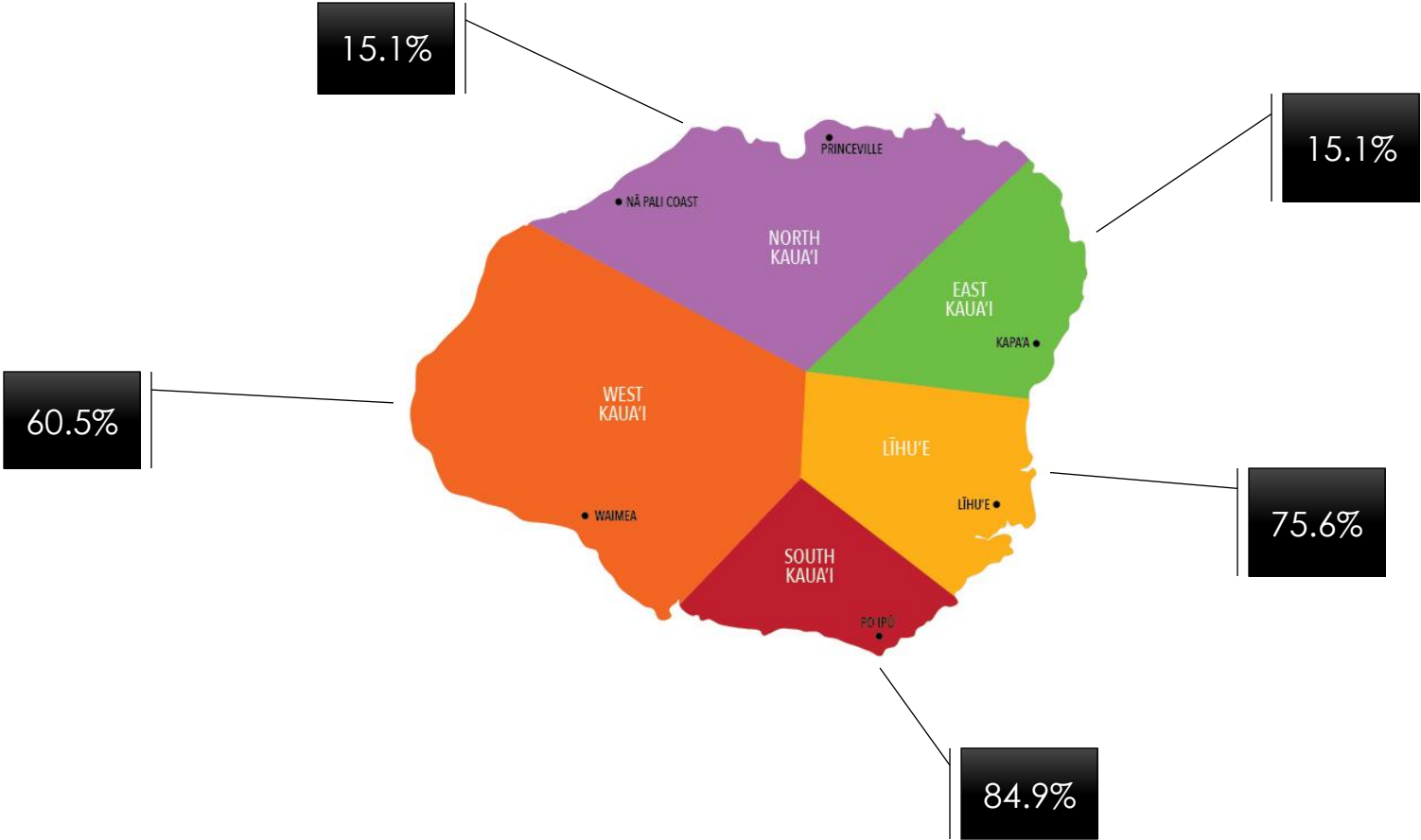
AREAS VISITED KAUA'I U.S. WEST



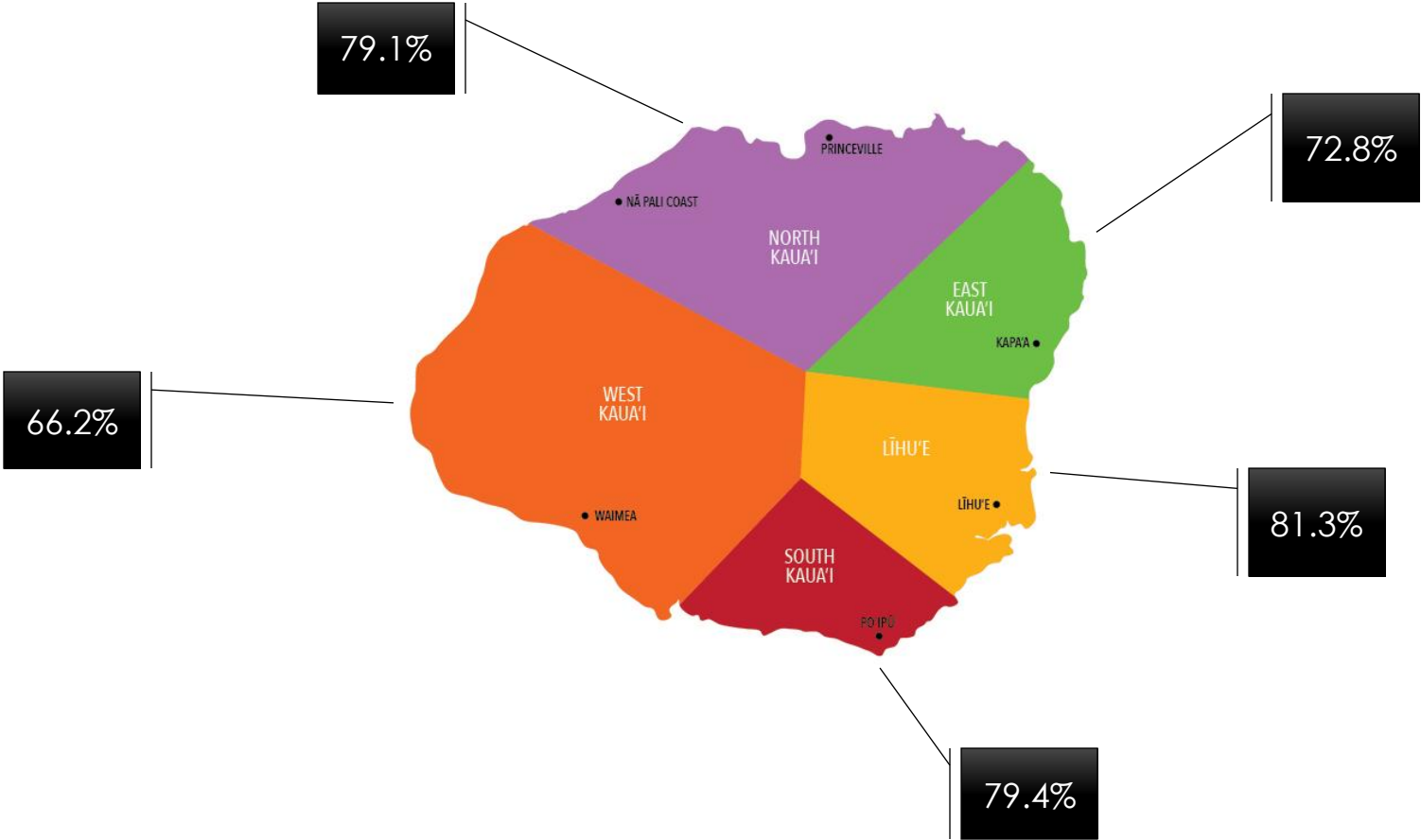
AREAS VISITED KAUA'I U.S. EAST



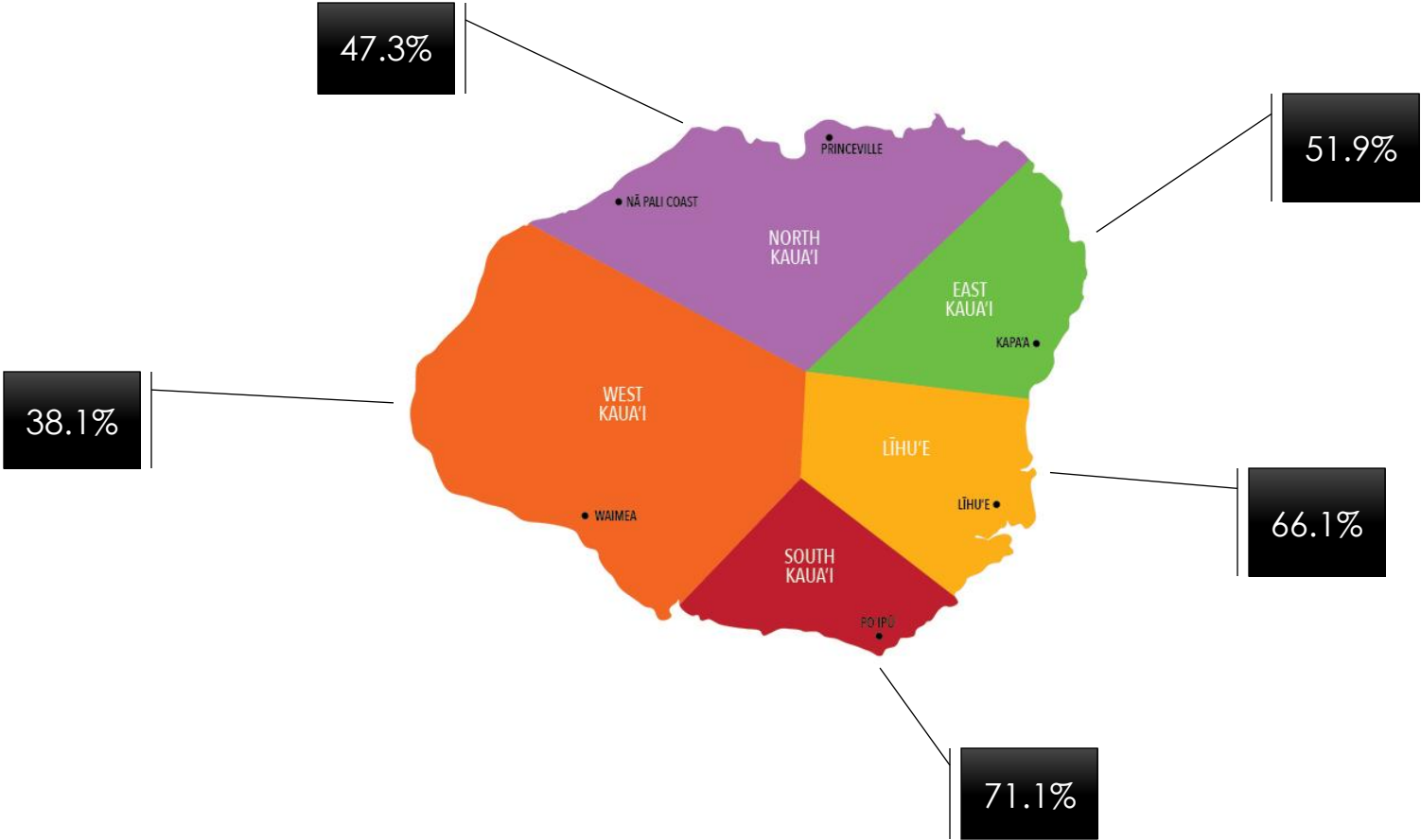
AREAS VISITED KAUA'I JAPAN



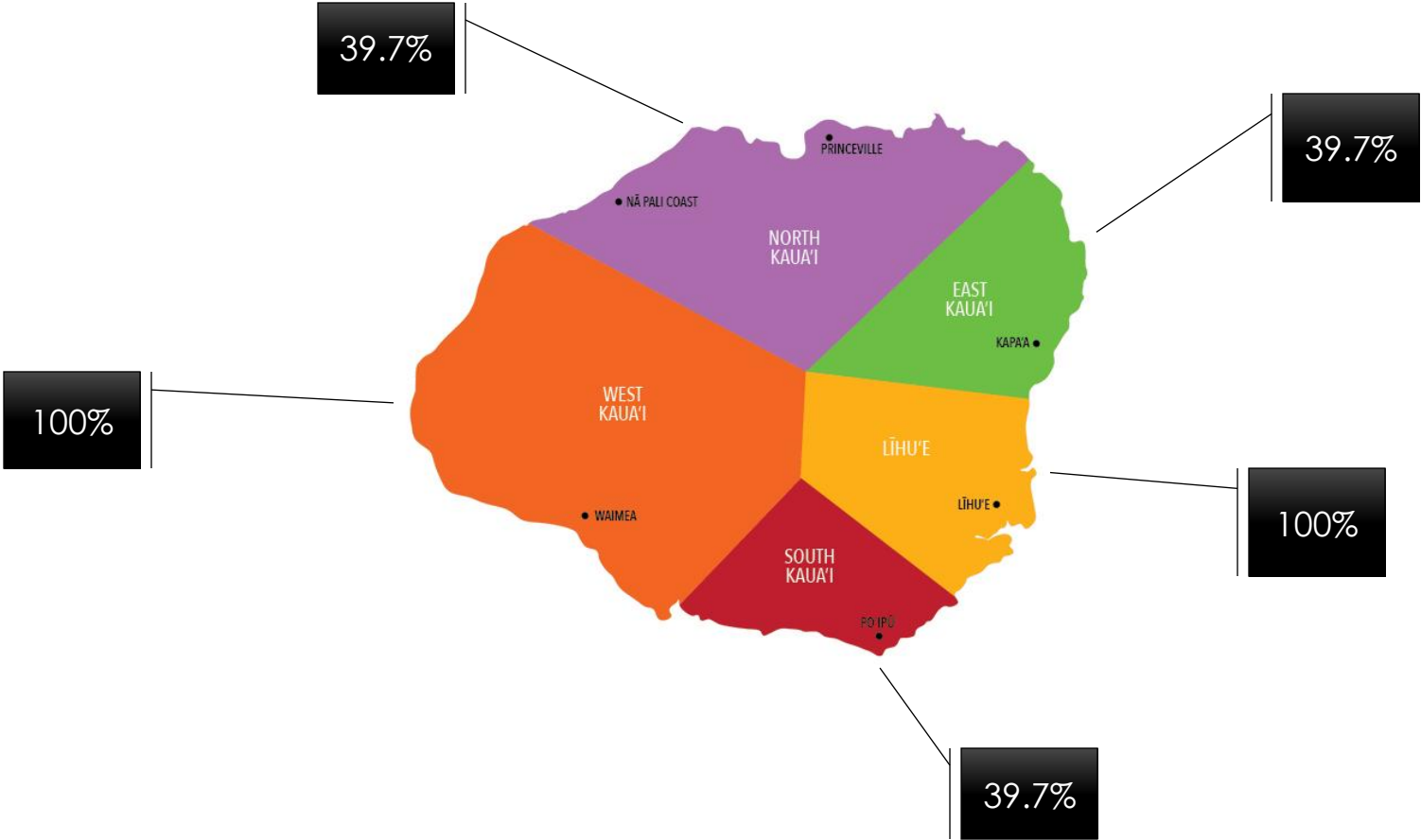
AREAS VISITED KAUA'I CANADA



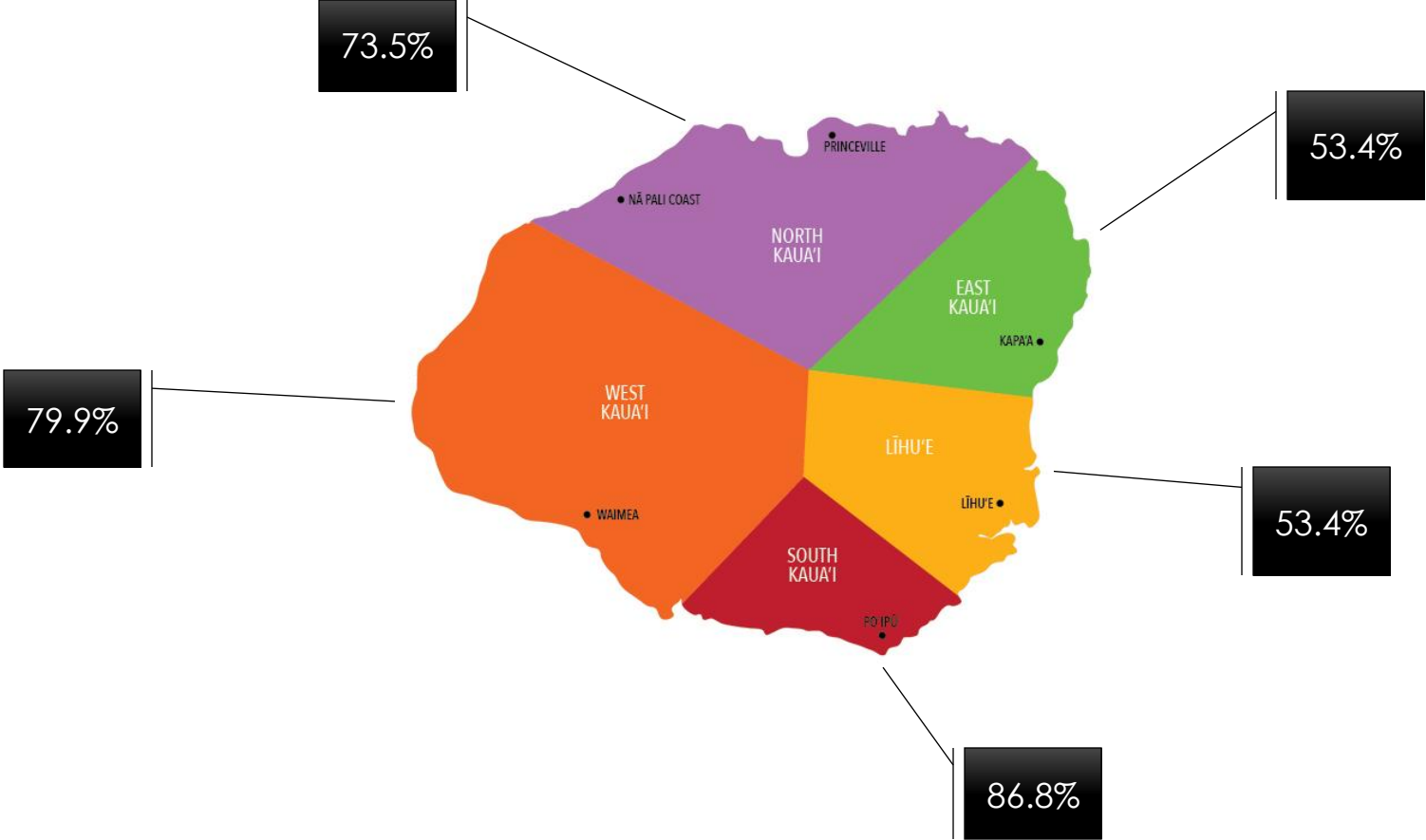
AREAS VISITED KAUA'I OCEANIA



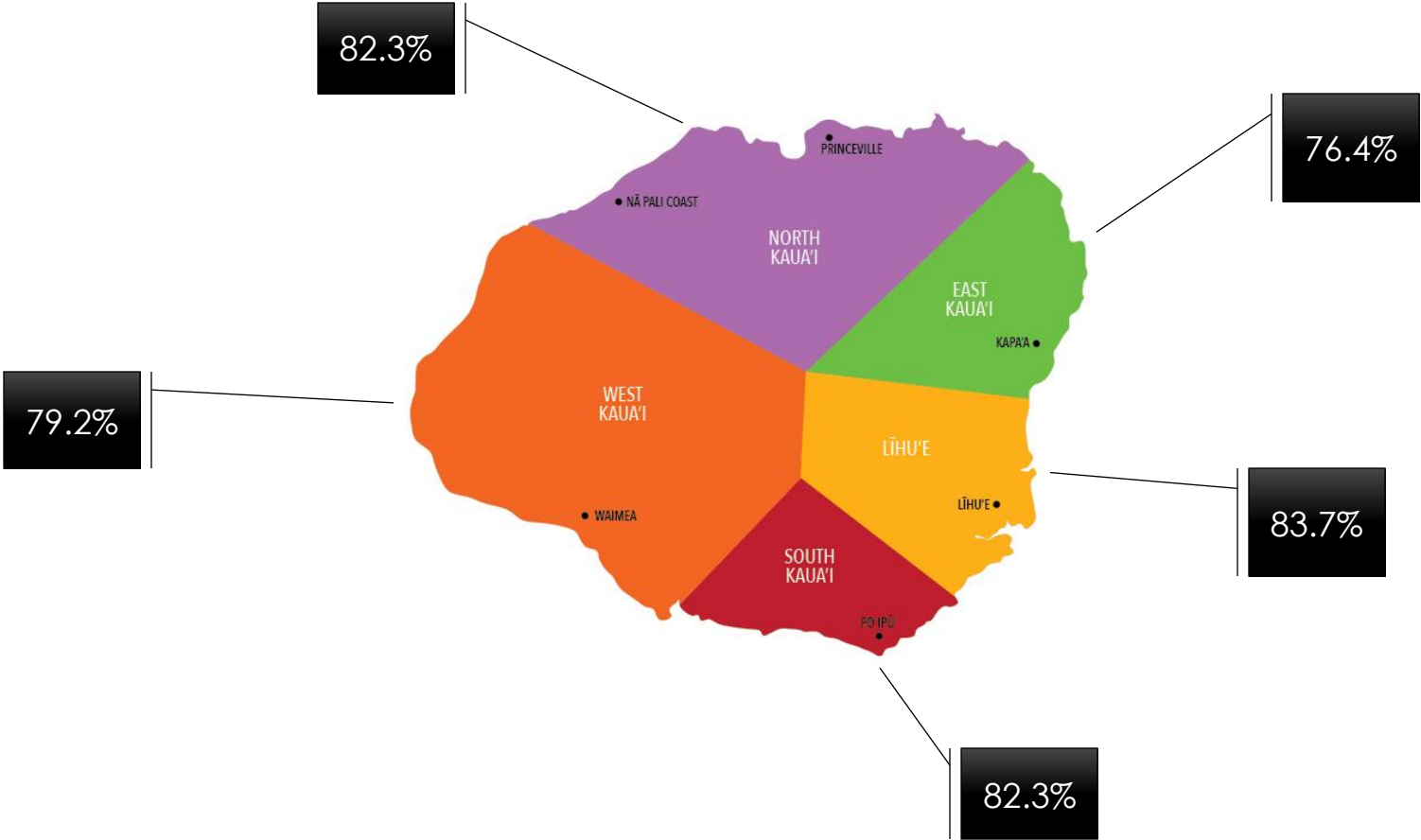
AREAS VISITED KAUA'I CHINA



AREAS VISITED KAUA'I KOREA



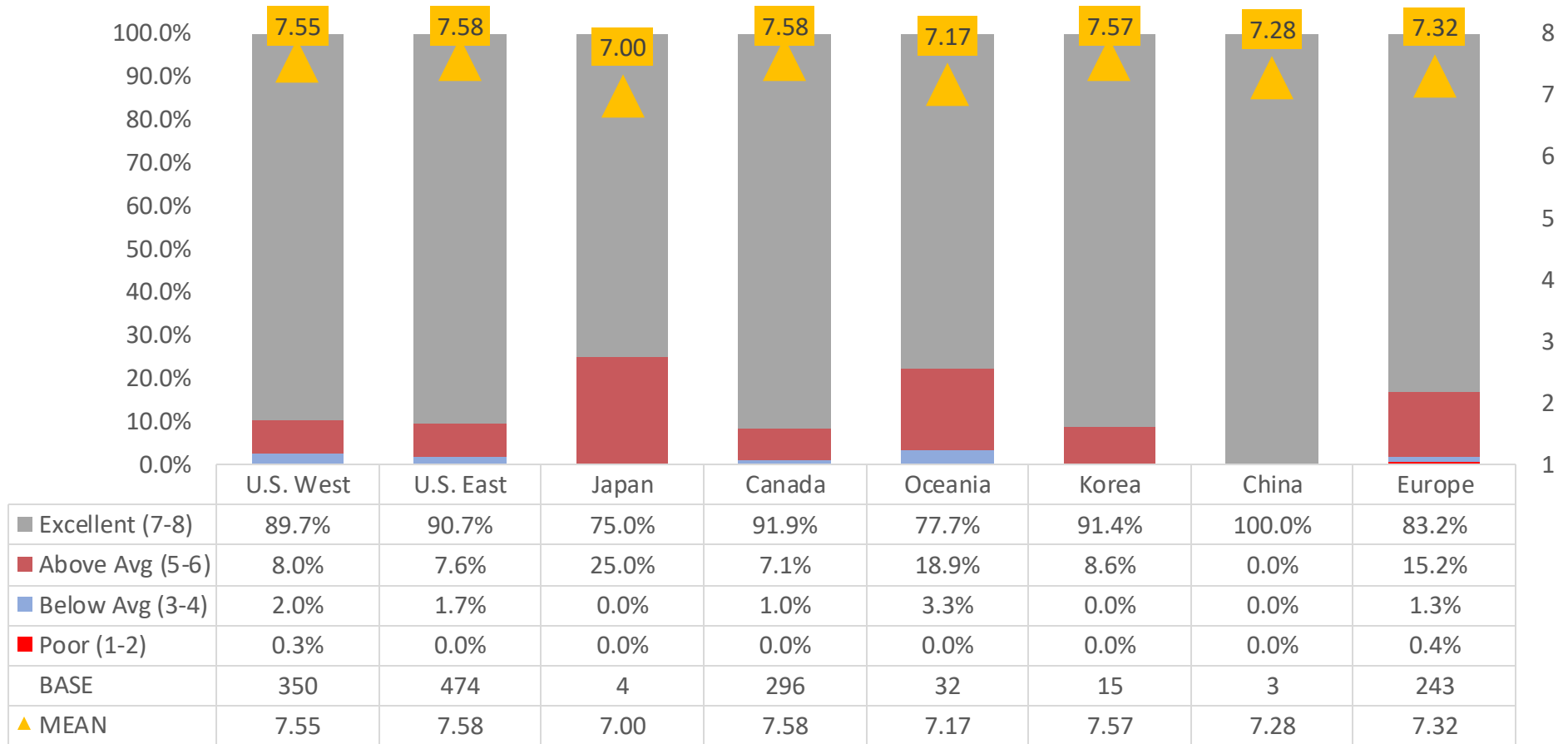
AREAS VISITED KAUA'I EUROPE



Section 7 – Maui

SATISFACTION - MAUI

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

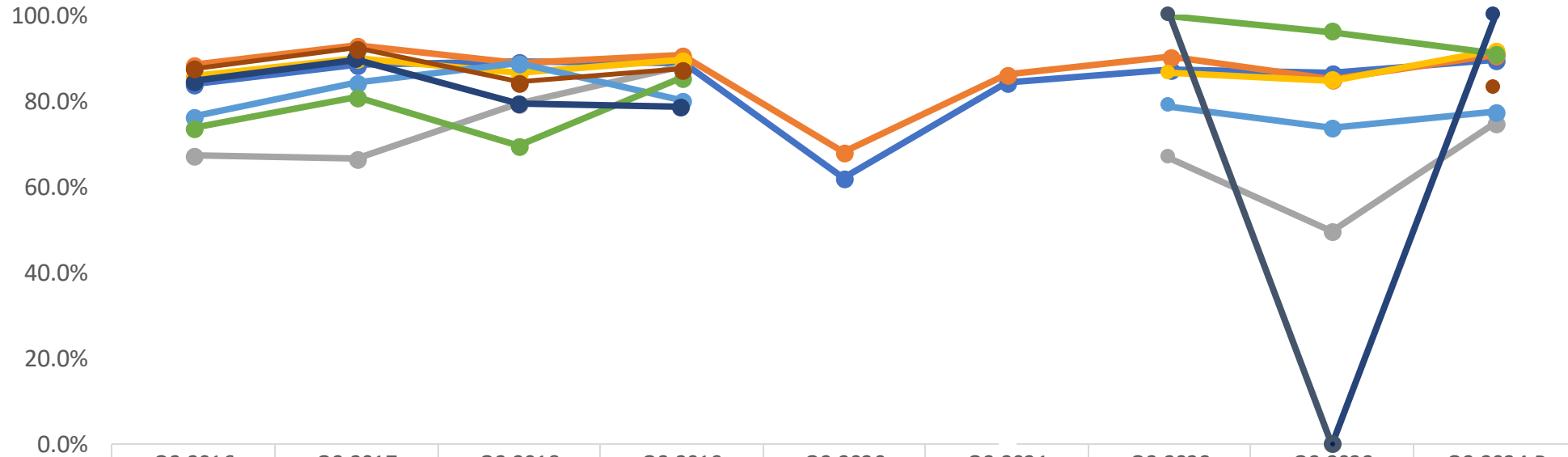


SATISFACTION - MAUI

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents.
- **Travel party size:** Visitors from **U.S. West** here in larger travel parties (3+) were more satisfied than those here with just one other person.

SATISFACTION - MAUI

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



	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Q3 2024 P
U.S. West	84.2%	88.5%	89.4%	89.2%	62.0%	84.3%	87.4%	86.8%	89.7%
U.S. East	88.5%	93.0%	88.9%	90.9%	68.2%	86.3%	90.3%	85.2%	90.7%
Japan	67.5%	66.6%	79.4%	88.4%			66.7%	49.7%	75.0%
Canada	85.9%	90.2%	86.7%	89.9%			86.7%	85.0%	91.9%
Oceania	76.5%	84.5%	88.8%	80.4%			78.9%	73.8%	77.7%
Korea	74.0%	80.9%	69.8%	85.4%			100.0%	96.3%	91.4%
China	84.8%	89.9%	79.4%	78.6%			100.0%	0.0%	100.0%
Europe	87.8%	92.5%	84.6%	87.6%					83.2%

P= Preliminary Data

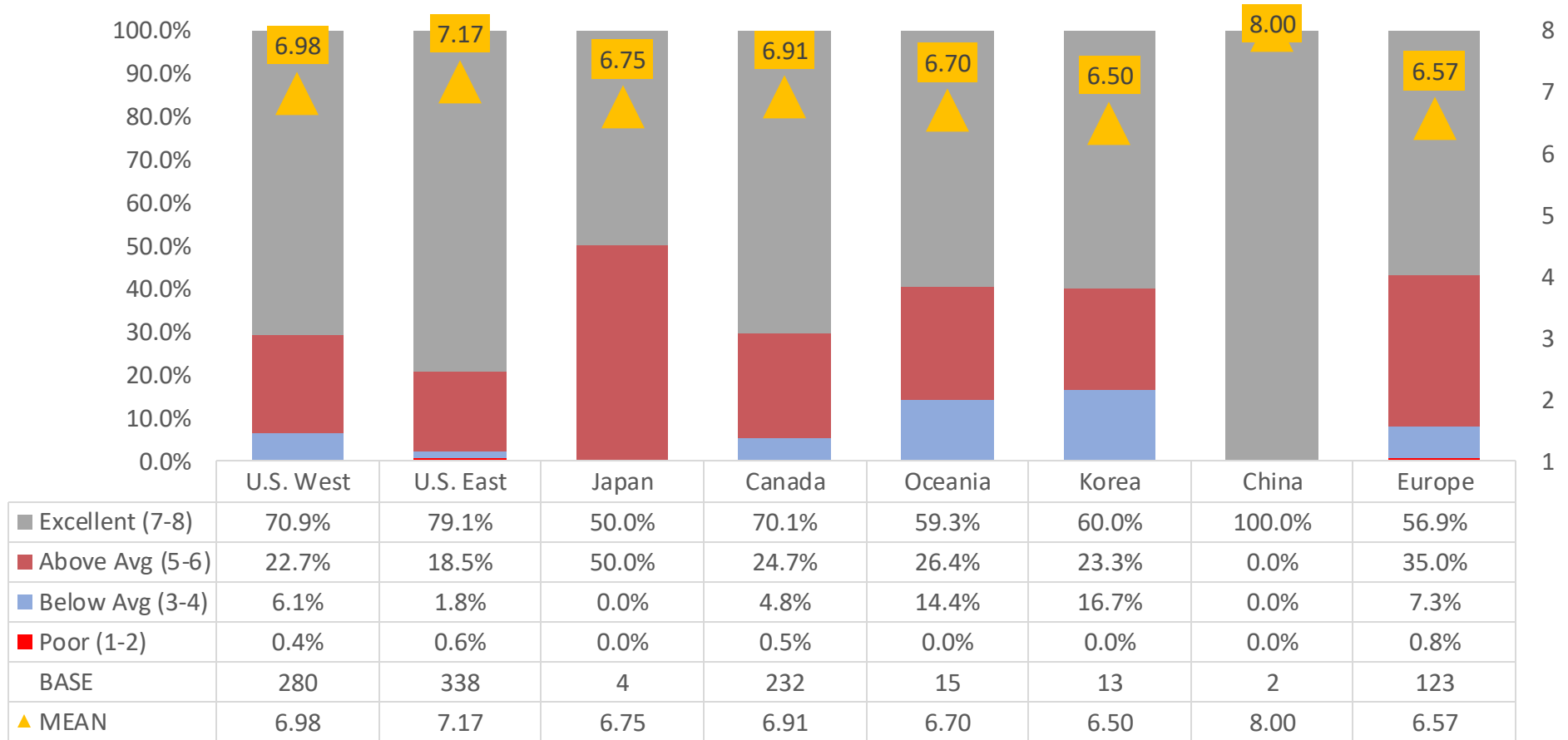
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



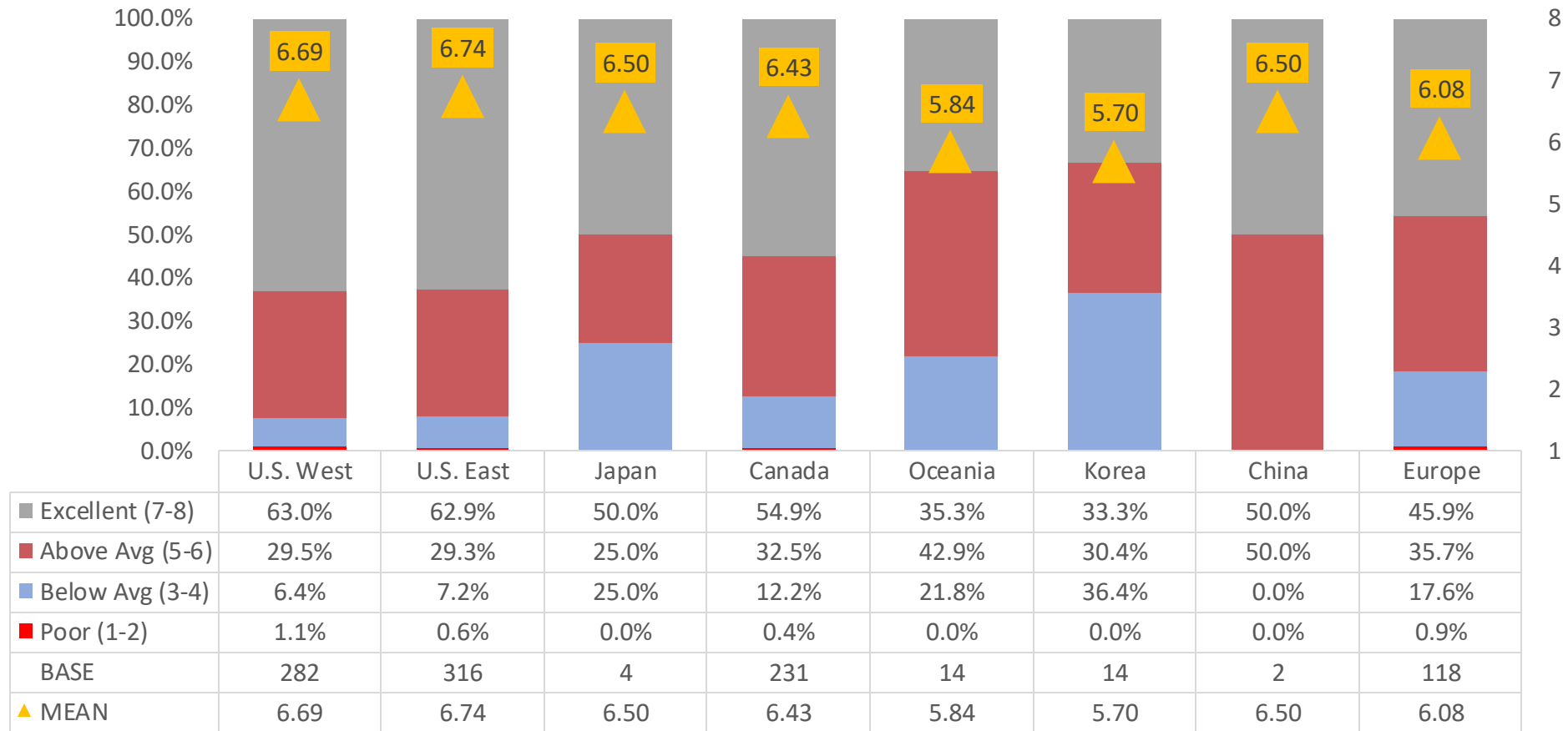
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



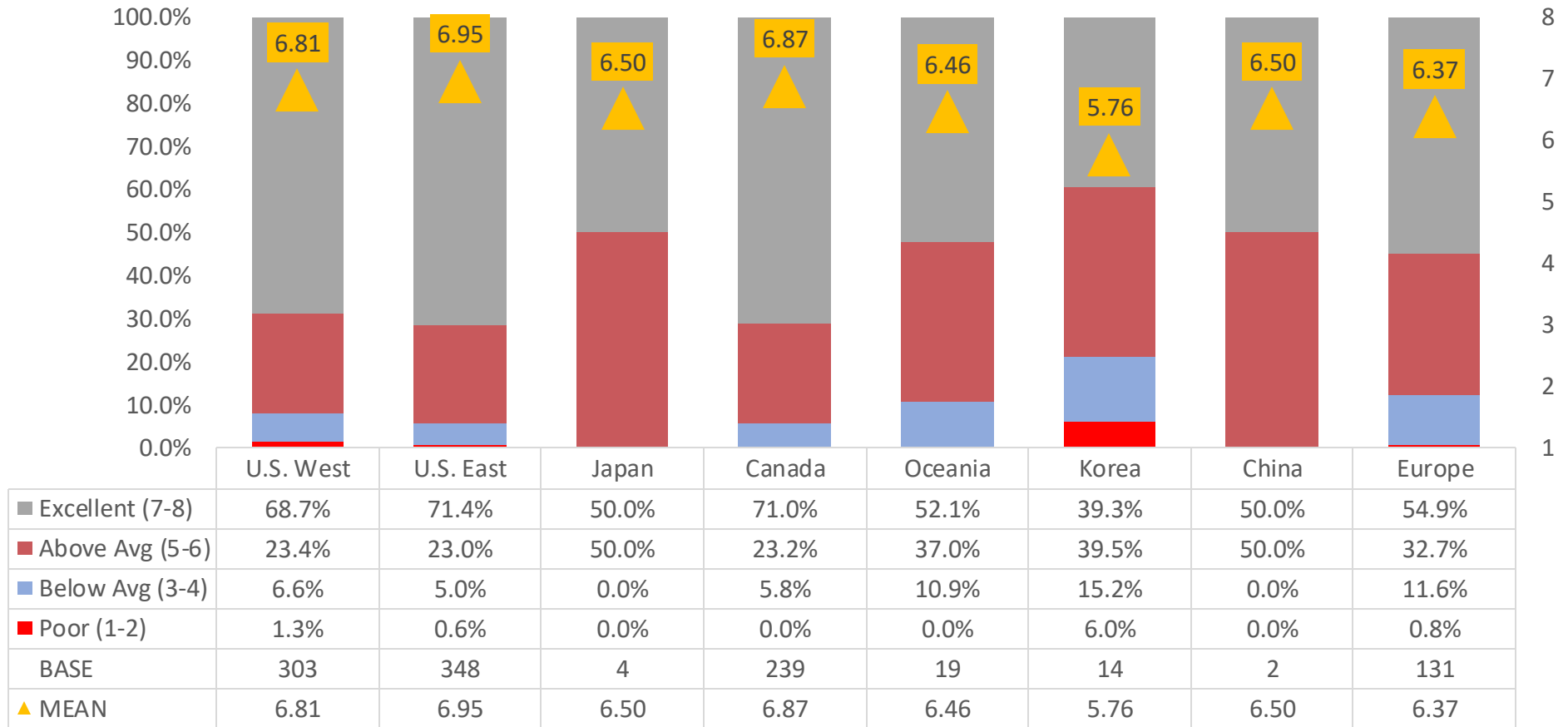
SHOPPING - MAUI

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



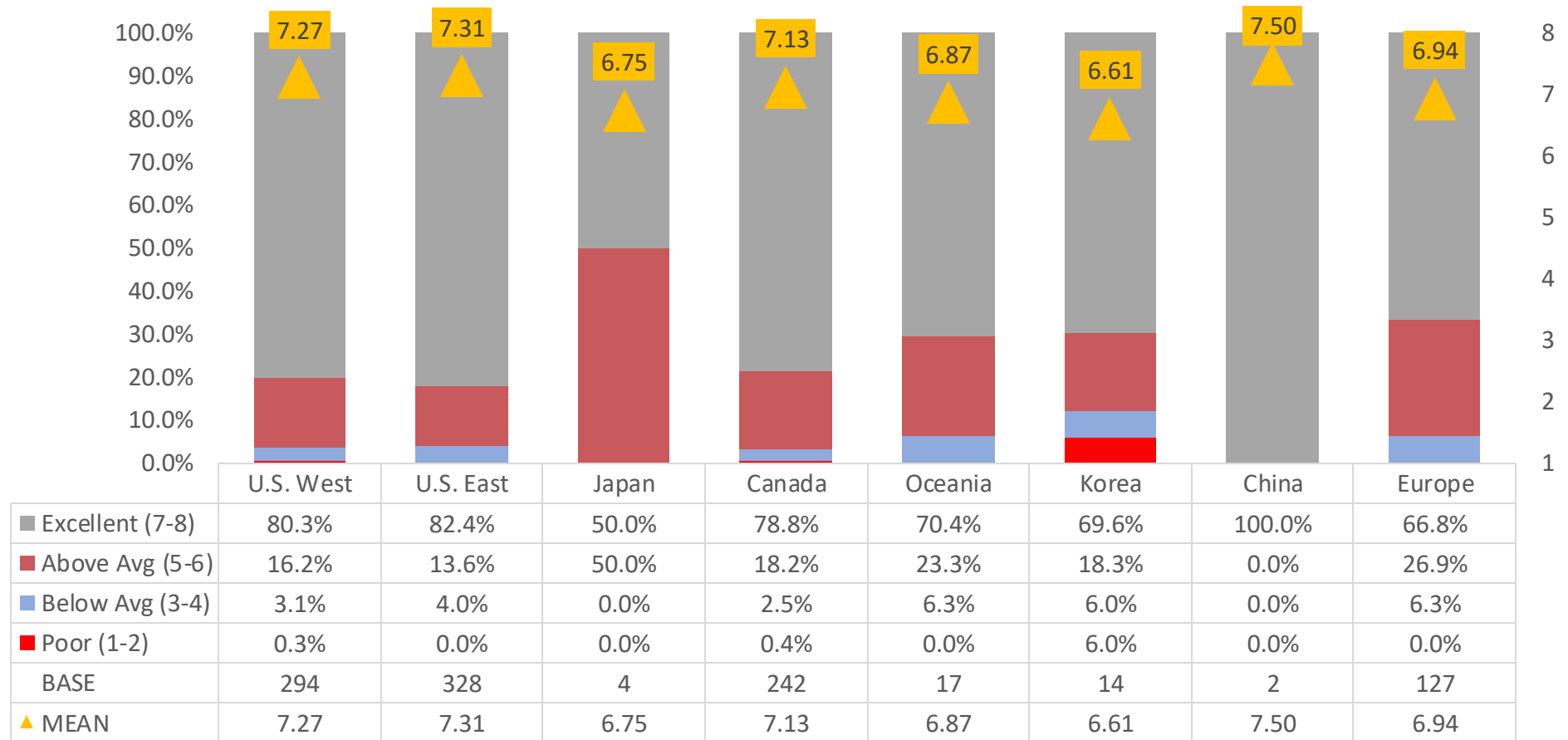
DINING/ FOOD & BEVERAGE - MAUI

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



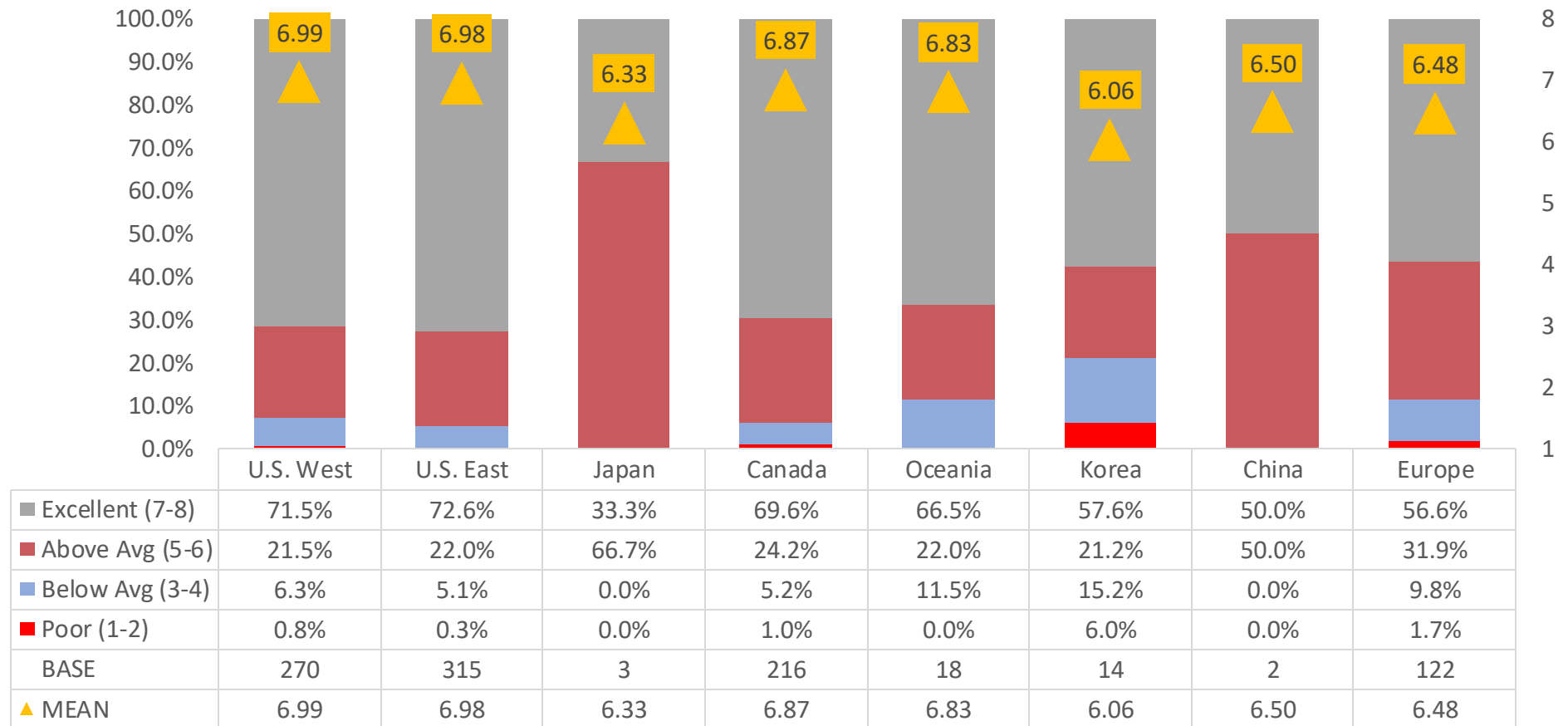
LODGING/ ACCOMMODATIONS - MAUI

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



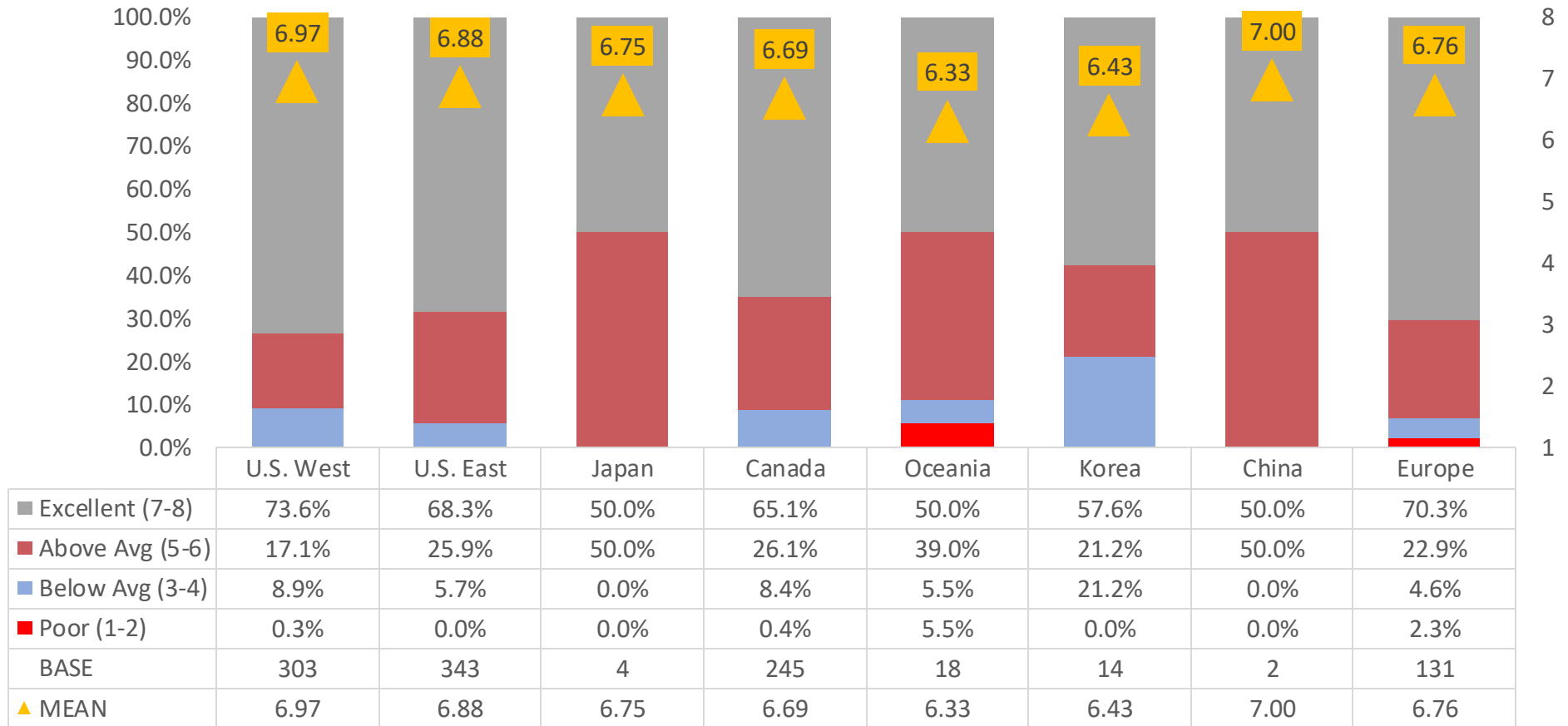
TRANSPORTATION ON ISLAND - MAUI

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



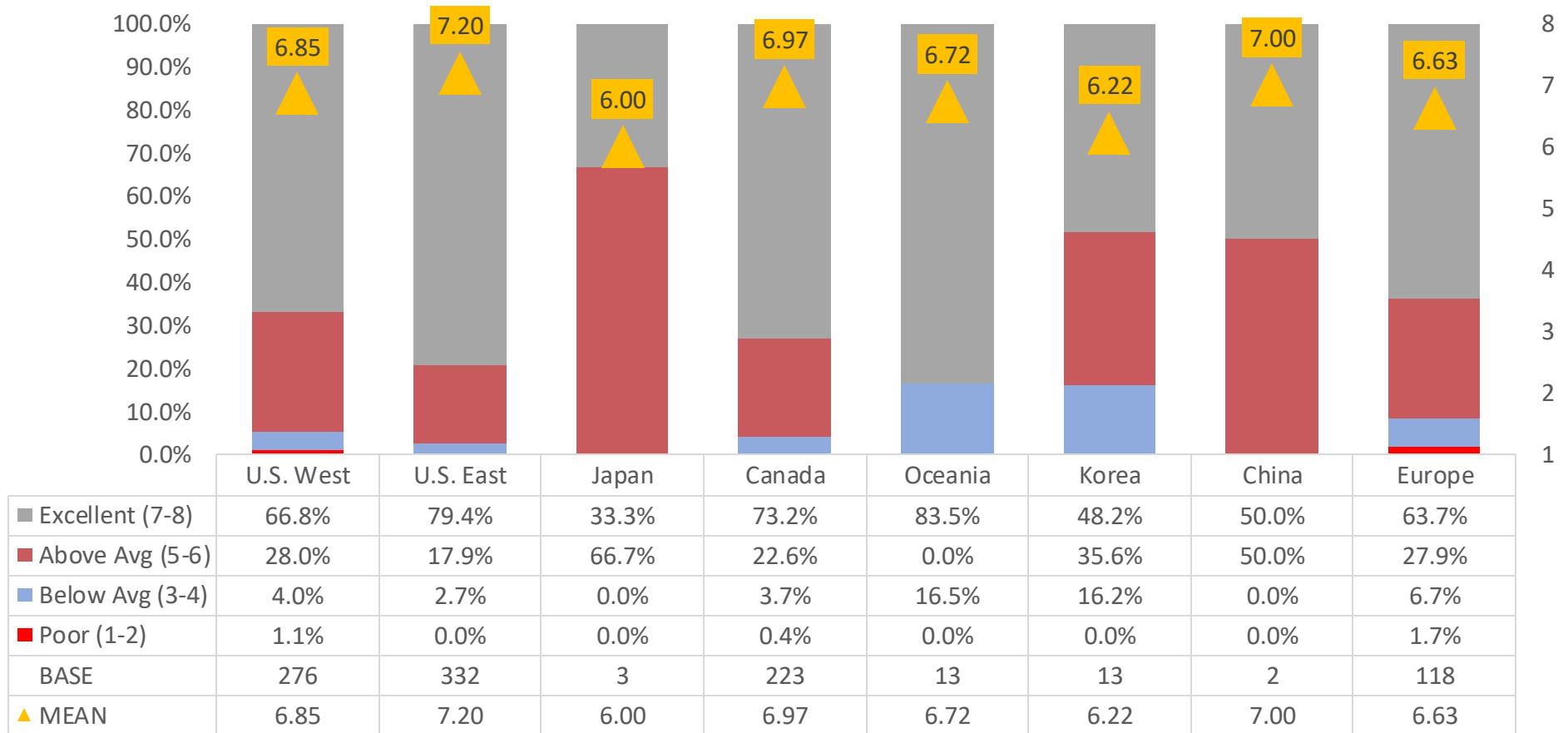
AIRPORT - MAUI

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



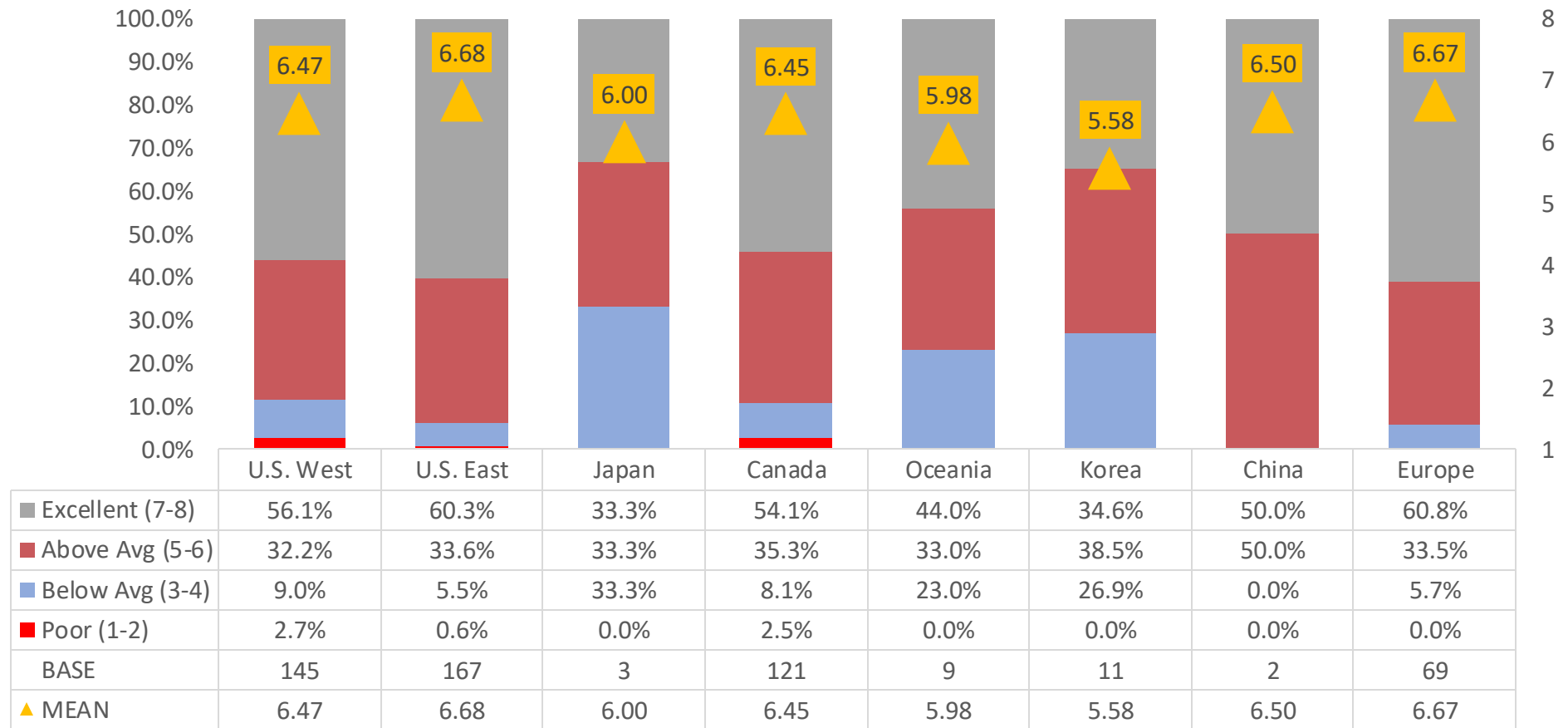
CULTURAL EXPERIENCES - MAUI

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



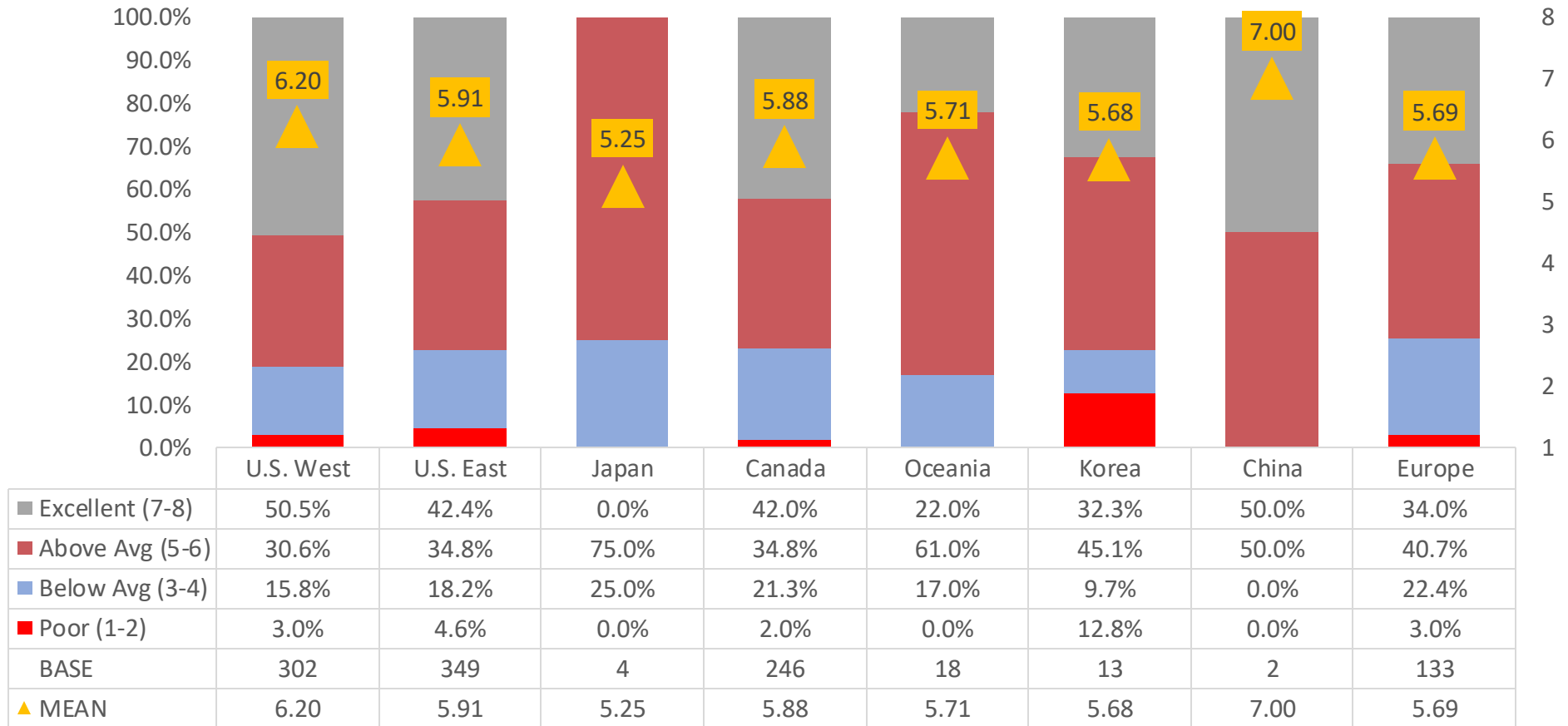
VOLUNTEER EXPERIENCES - MAUI

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



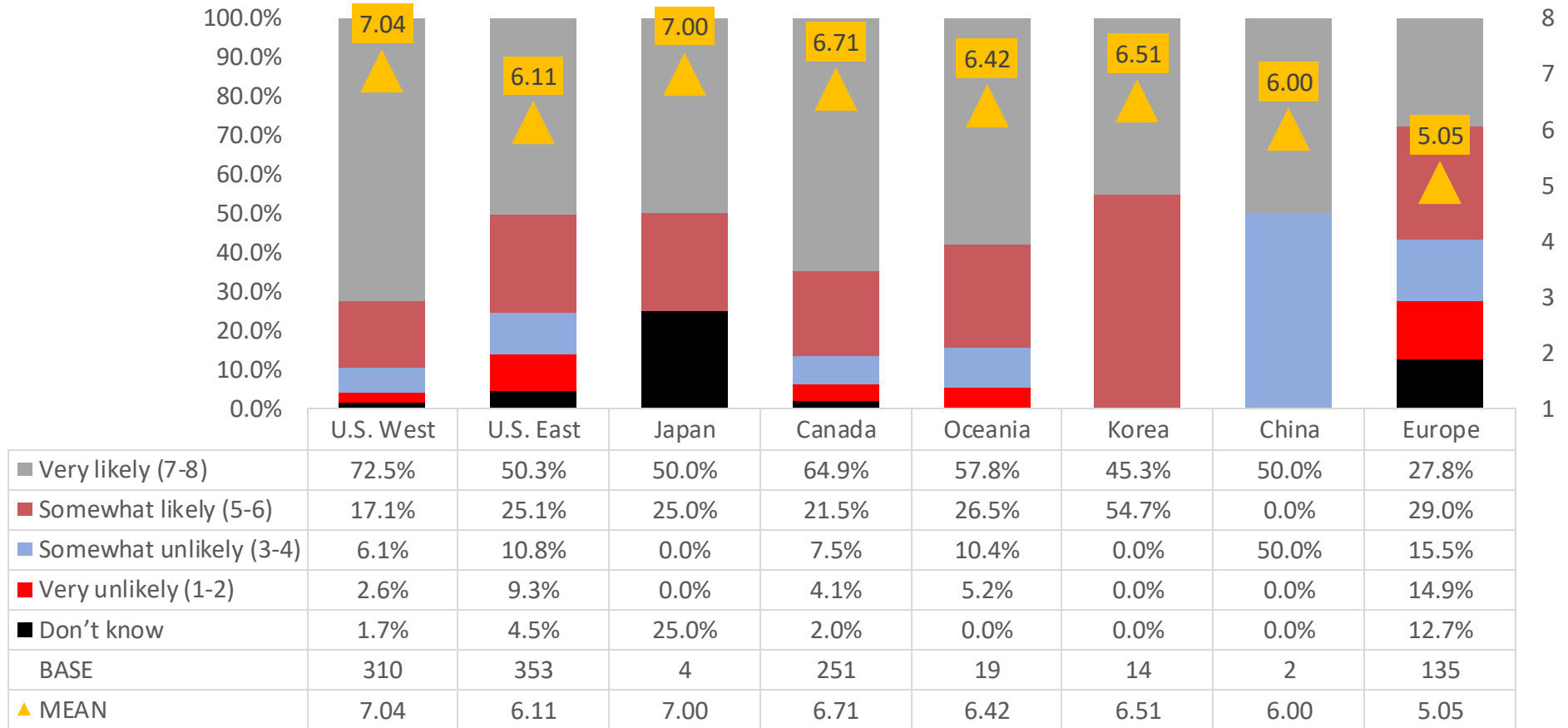
VALUE FOR THE MONEY - MAUI

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



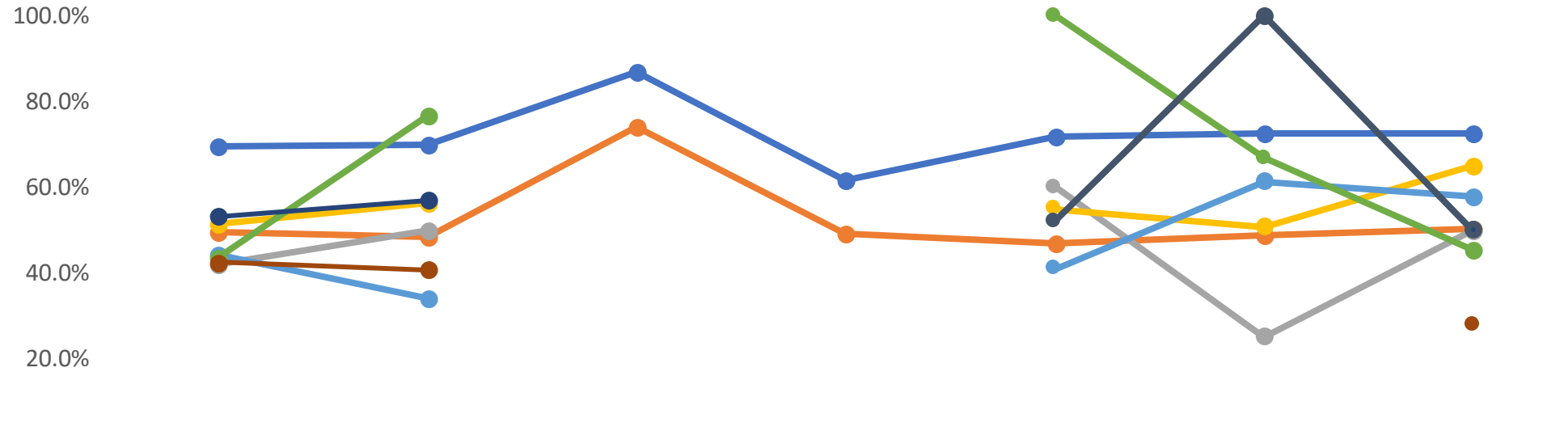
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023	Q3 2024
U.S. West	69.5%	69.8%	87.1%	61.6%	71.8%	72.5%	72.5%
U.S. East	49.5%	48.6%	74.3%	49.1%	47.1%	49.0%	50.3%
Japan	41.9%	50.0%			60.0%	25.1%	50.0%
Canada	51.6%	56.4%			54.9%	50.8%	64.9%
Oceania	44.2%	34.1%			41.0%	61.4%	57.8%
Korea	43.4%	76.8%			100.0%	66.8%	45.3%
China	53.2%	57.1%			52.1%	100.0%	50.0%
Europe	42.4%	40.8%					27.8%

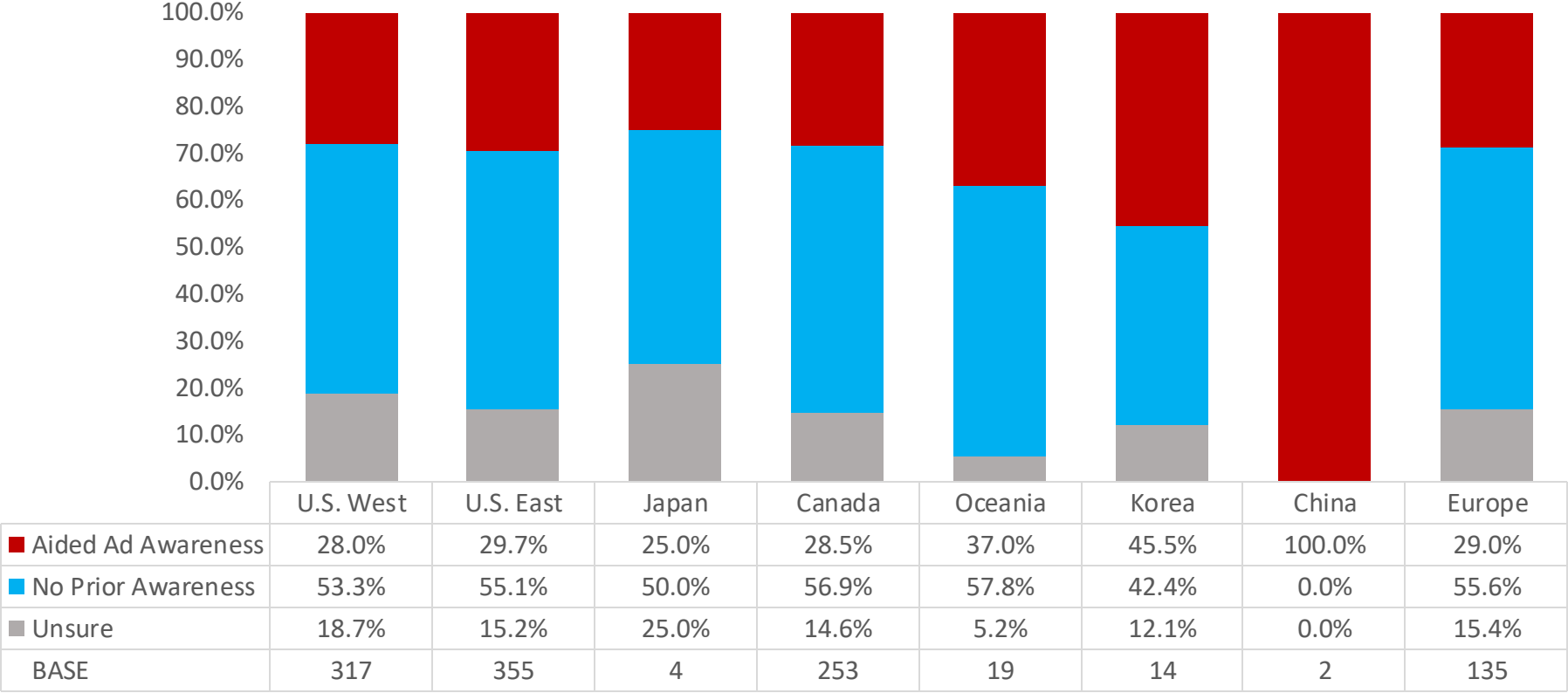
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



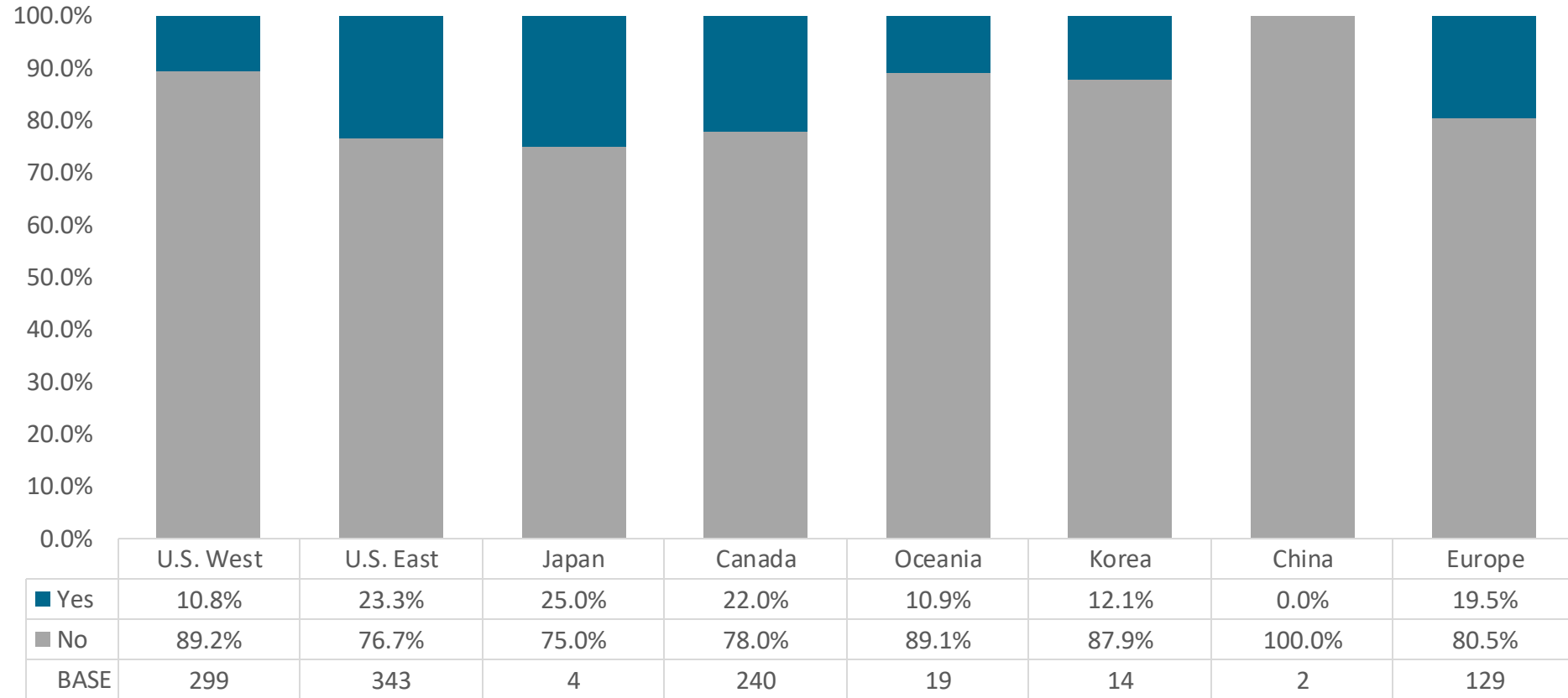
AIDED ADVERTISING AWARENESS - MAUI



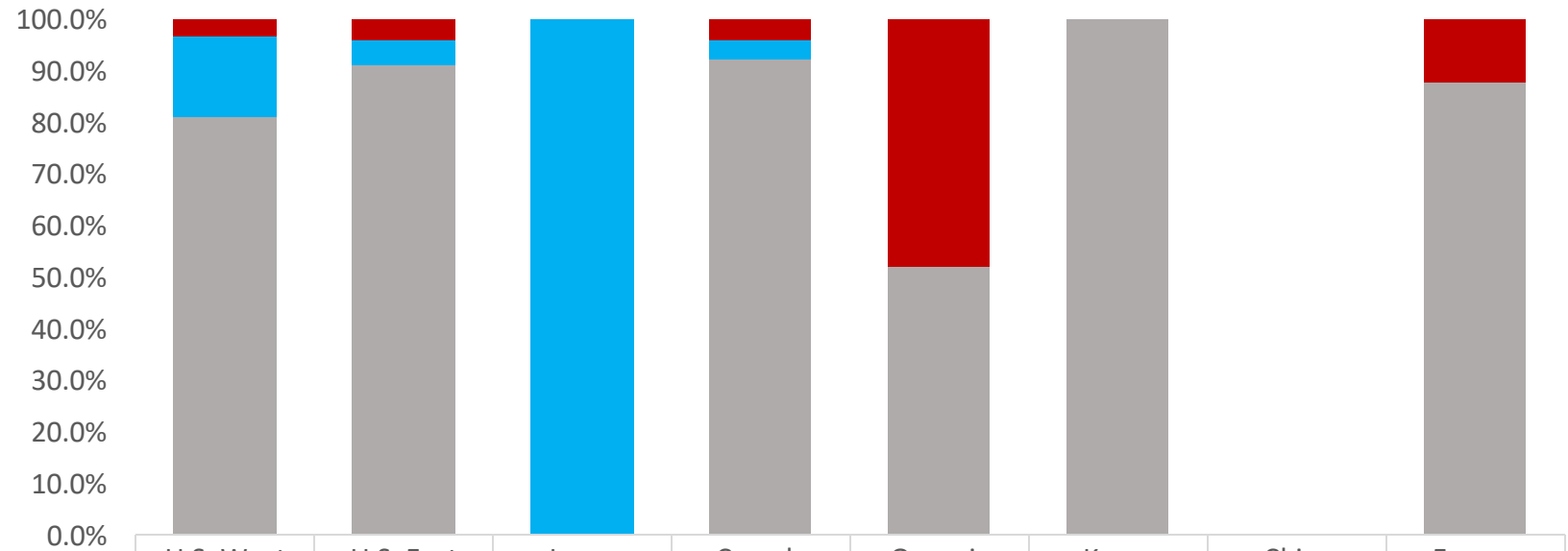
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	38.2%	53.3%	50.0%	46.0%	10.4%	0.0%	54.7%	53.0%
Hawaiian cultural events	10.9%	12.2%	25.0%	15.2%	5.2%	0.0%	0.0%	3.0%
Outdoor or sporting activities and events	15.3%	14.4%	25.0%	14.2%	0.0%	0.0%	6.0%	11.7%
Social media posts and videos	13.4%	15.8%	0.0%	20.0%	20.9%	0.0%	12.1%	18.7%
Hawaiian music	6.7%	5.4%	25.0%	11.4%	0.0%	0.0%	6.0%	1.5%
Television programs or movies filmed in Hawai'i	4.8%	7.1%	0.0%	11.6%	5.7%	50.0%	0.0%	14.9%
BASE	317	355	4	253	19	2	14	135

WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE

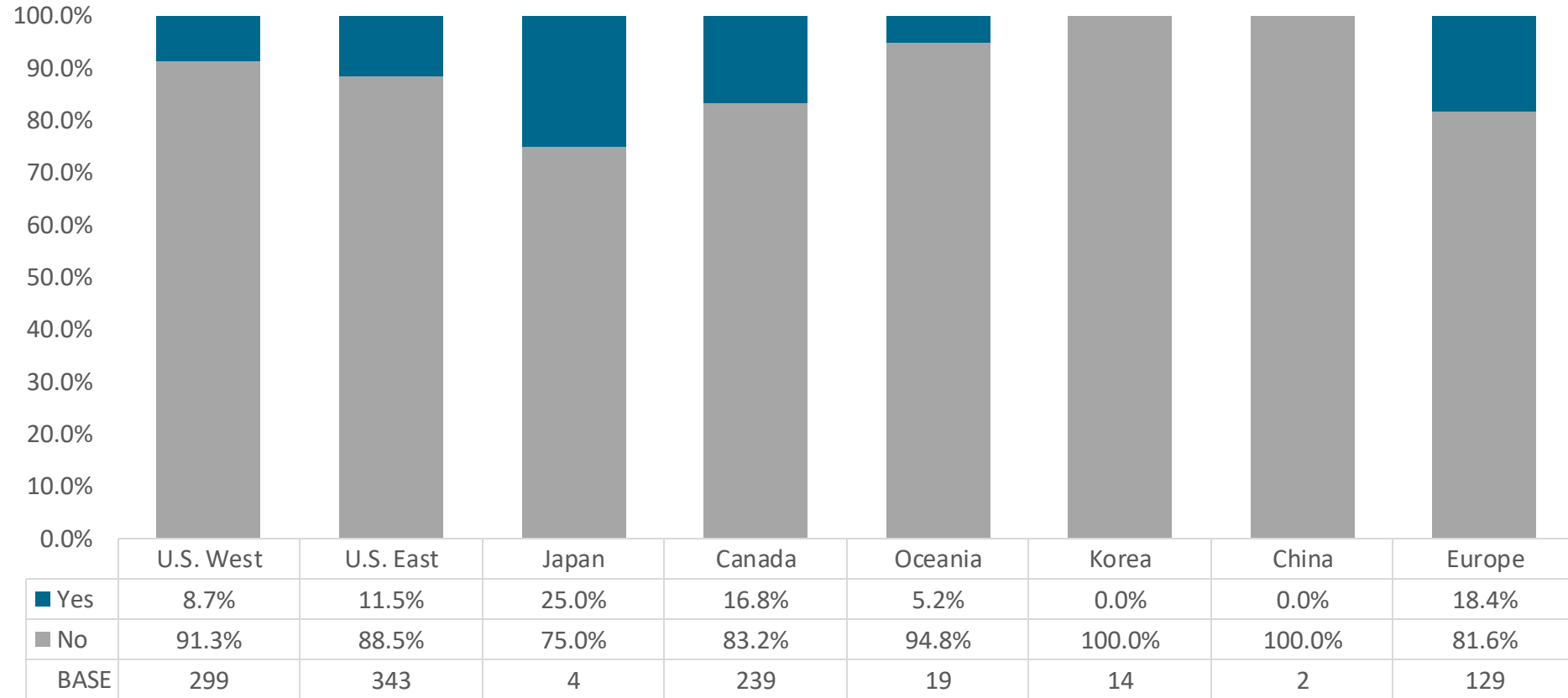


WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS

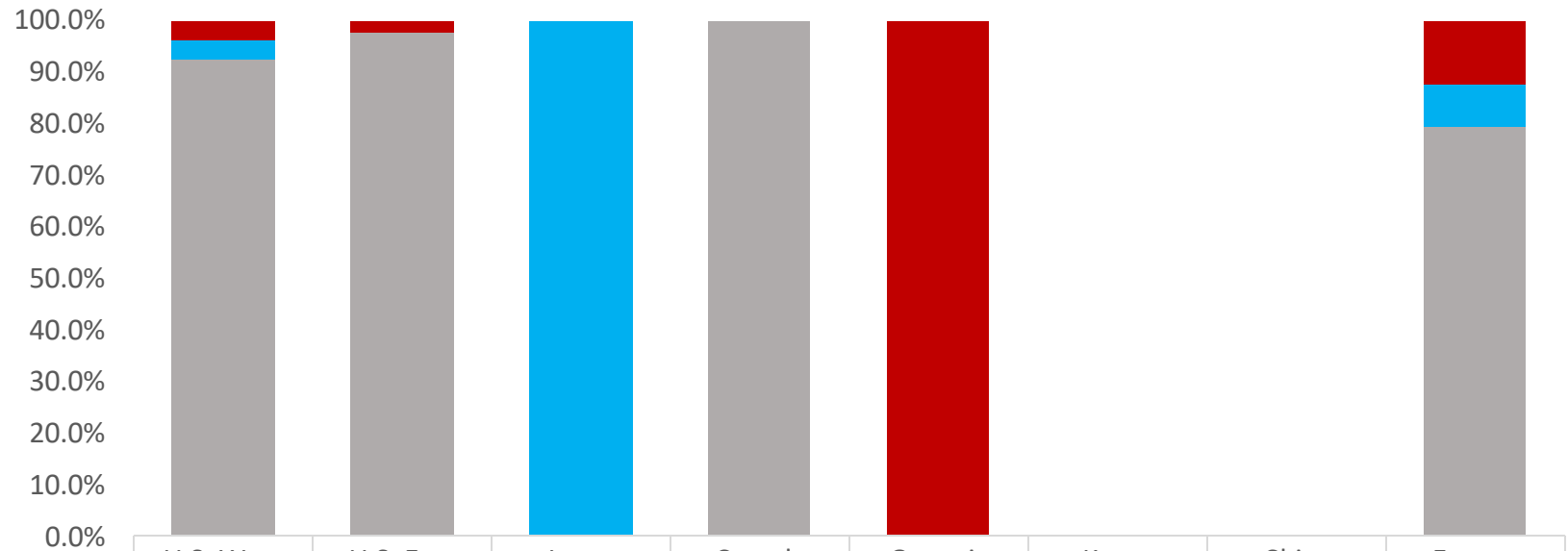


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
■ Yes, technical issues but able to book reservation	3.1%	3.8%	0.0%	3.9%	47.9%	0.0%		12.1%
■ Yes, unable to make reservation	15.6%	5.0%	100.0%	3.9%	0.0%	0.0%		0.0%
■ No, I was able to book a reservation without issue	81.3%	91.2%	0.0%	92.3%	52.1%	100.0%		87.9%
BASE	32	81	1	52	2	2	0	25

‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE

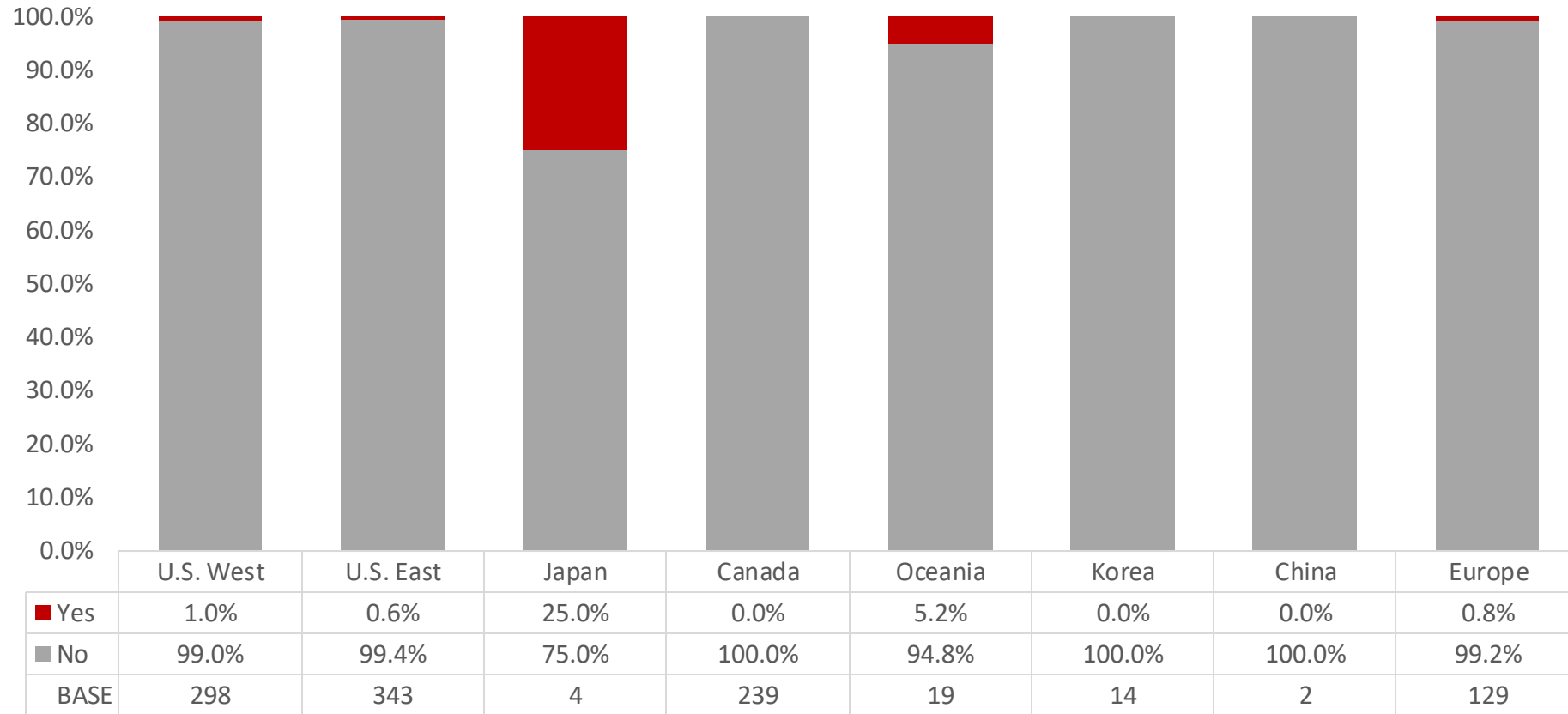


‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
■ Yes, technical issues but able to book reservation	3.8%	2.4%	0.0%	0.0%	100.0%			12.6%
■ Yes, unable to make reservation	3.8%	0.0%	100.0%	0.0%	0.0%			8.3%
■ No, I was able to book a reservation without issue	92.4%	97.6%	0.0%	100.0%	0.0%			79.1%
BASE	26	40	1	40	1	0	0	24

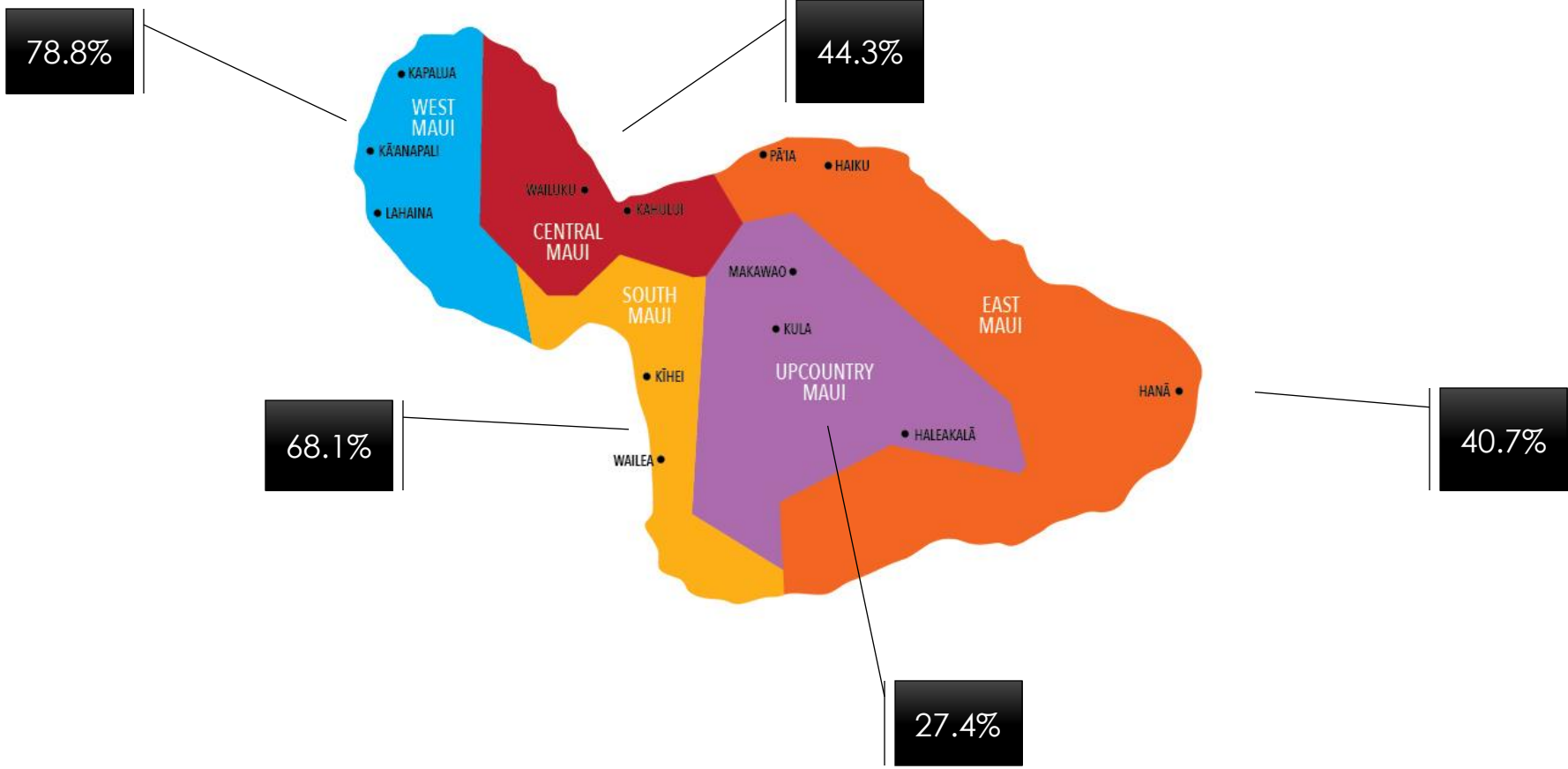
VISITED MAUI FOR SPECIFIC EVENT



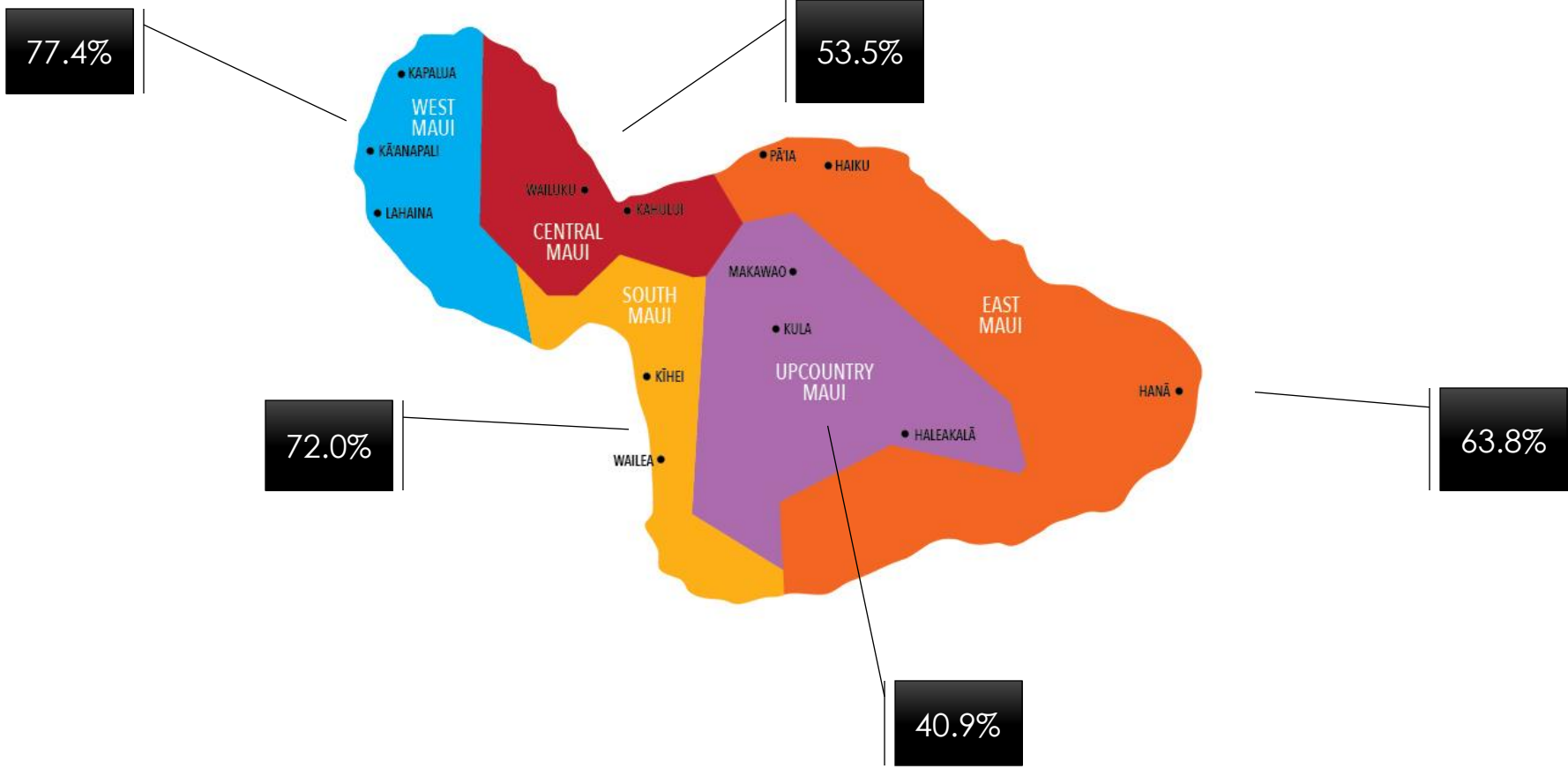
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Wedding/ honeymoon/ anniversary/ birthday/ funeral	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other festival/concert	66.7%	50.0%	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Other sporting event	33.3%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Total	3	2	1	0	1	0	0	1

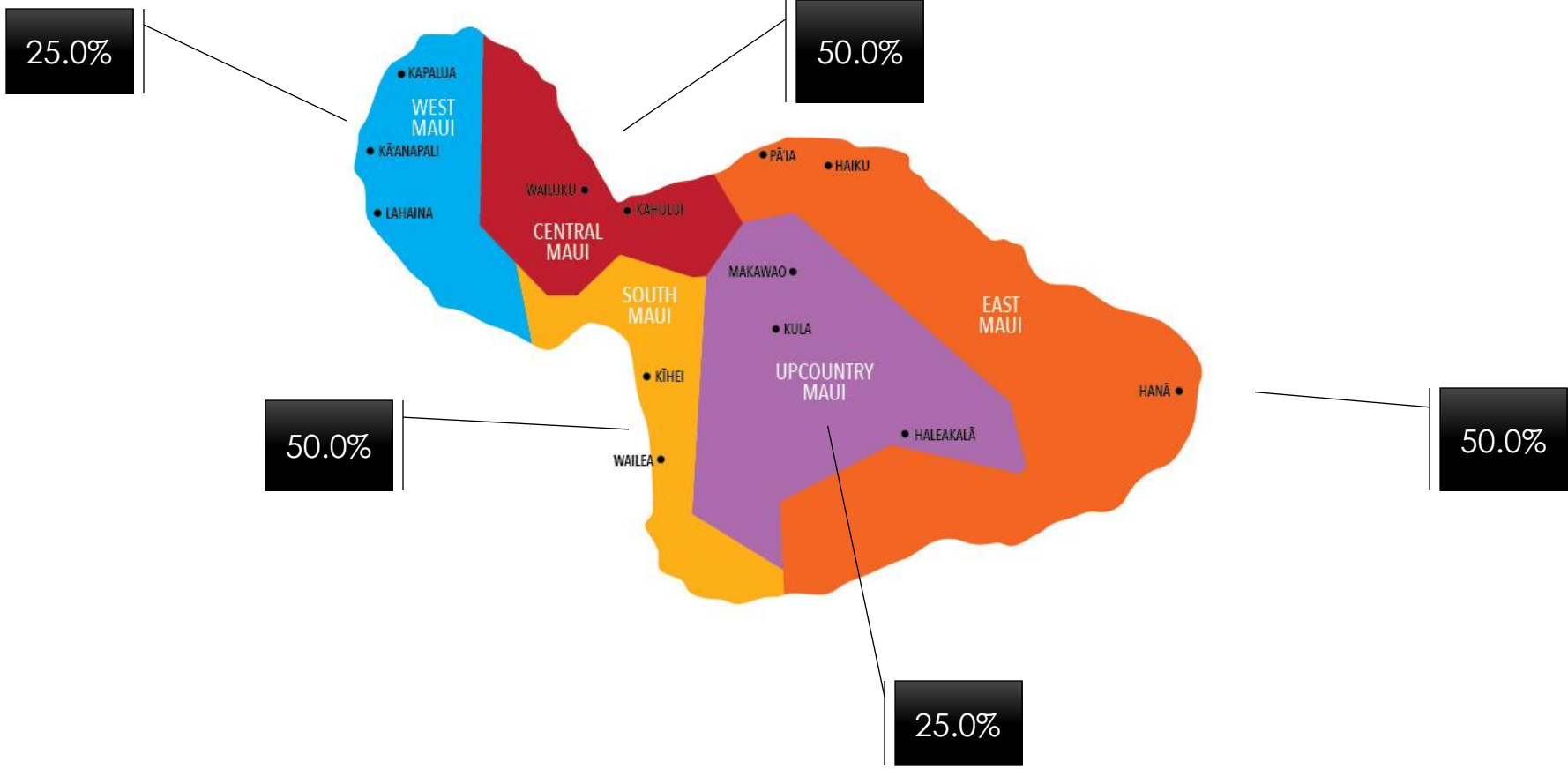
AREAS VISITED MAUI U.S. WEST



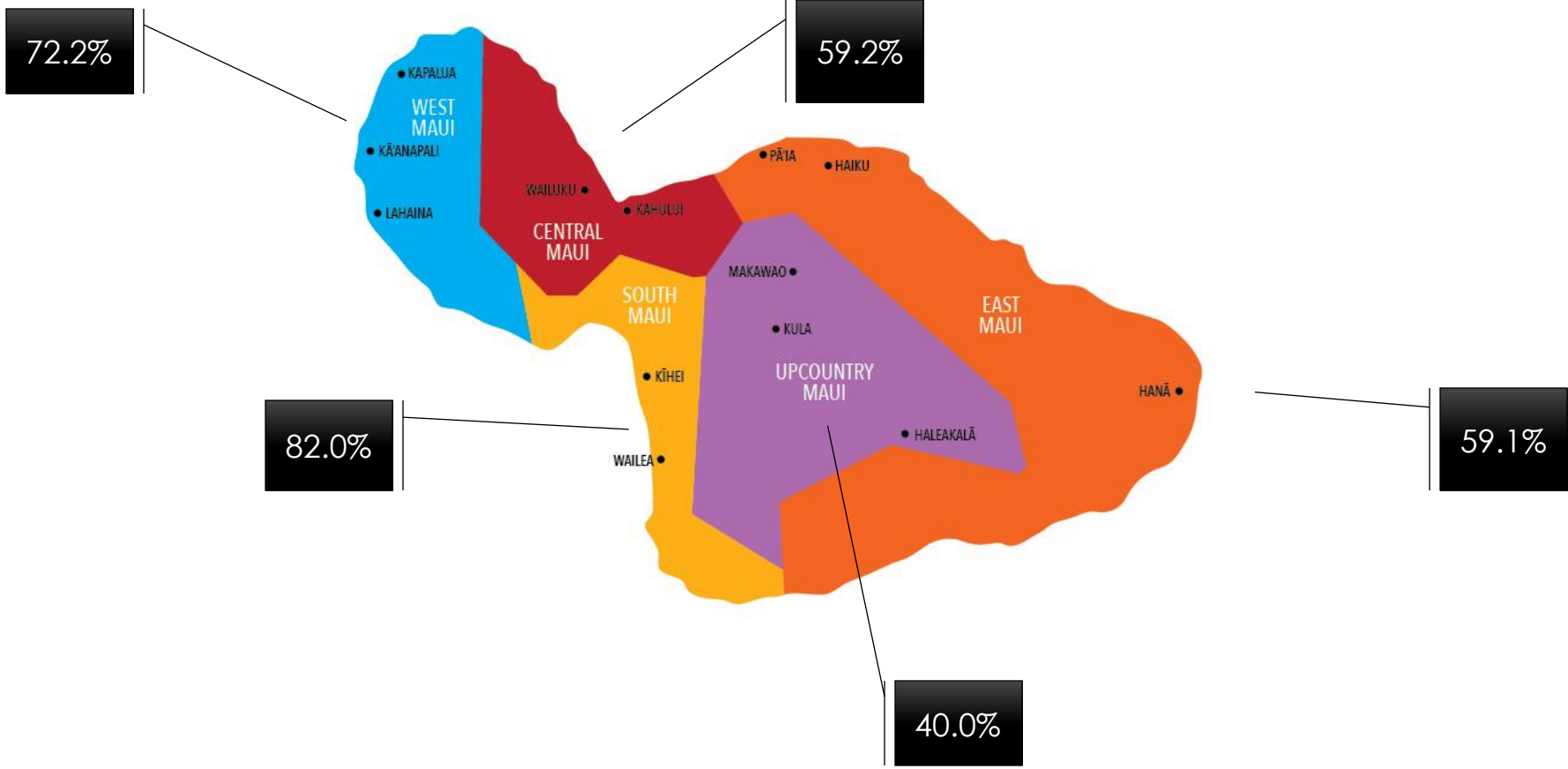
AREAS VISITED MAUI U.S. EAST



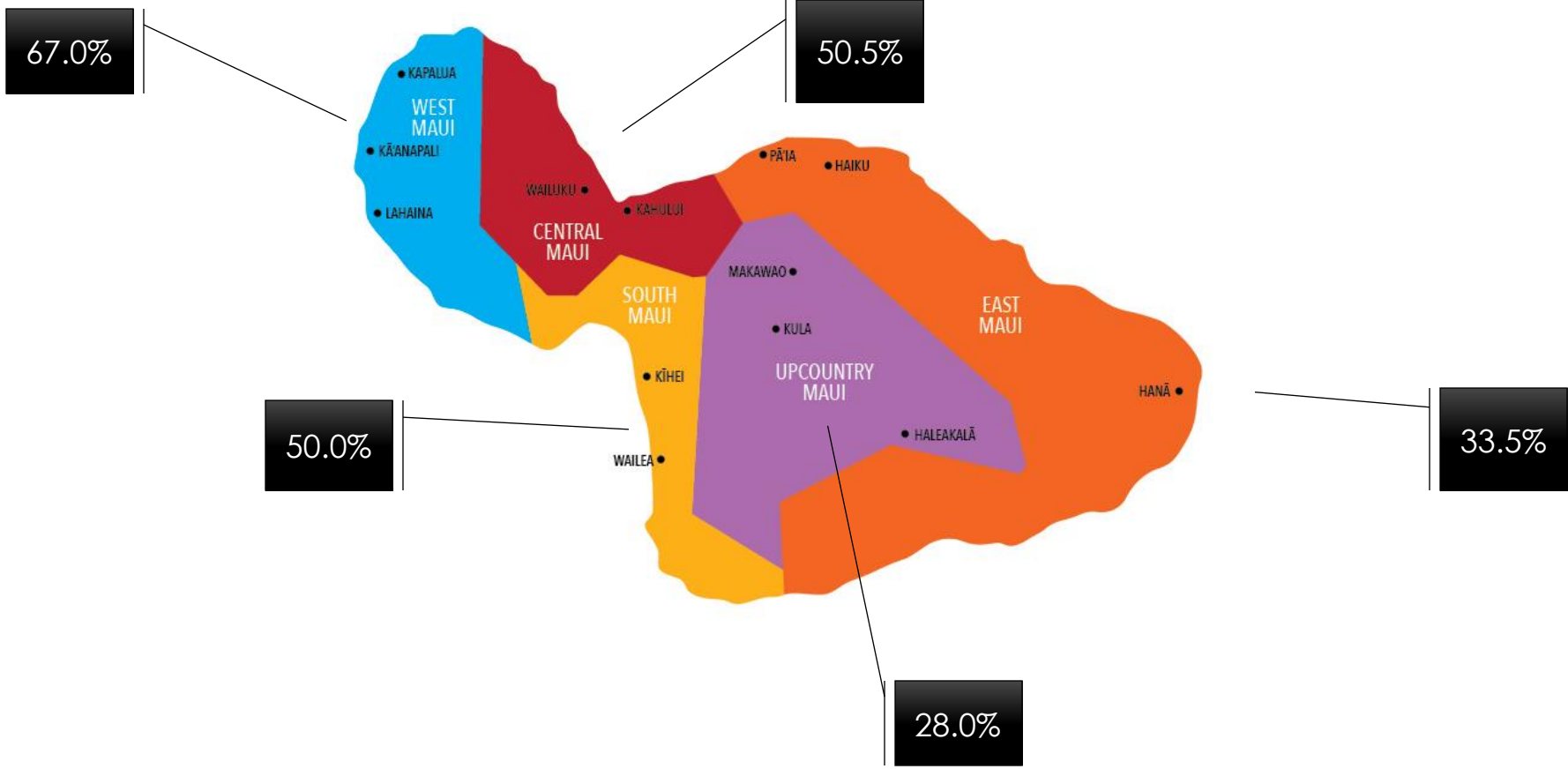
AREAS VISITED MAUI JAPAN



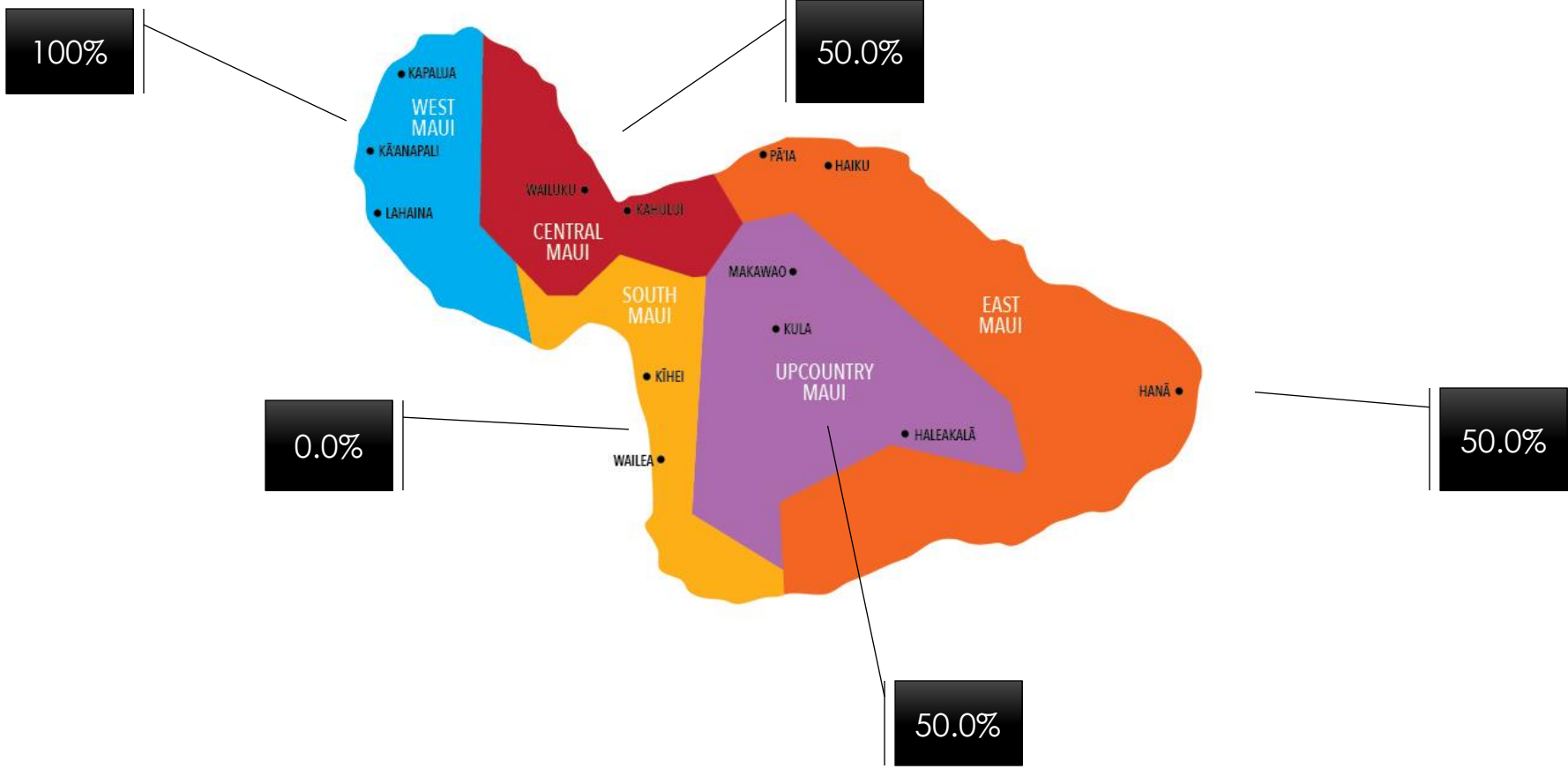
AREAS VISITED MAUI CANADA



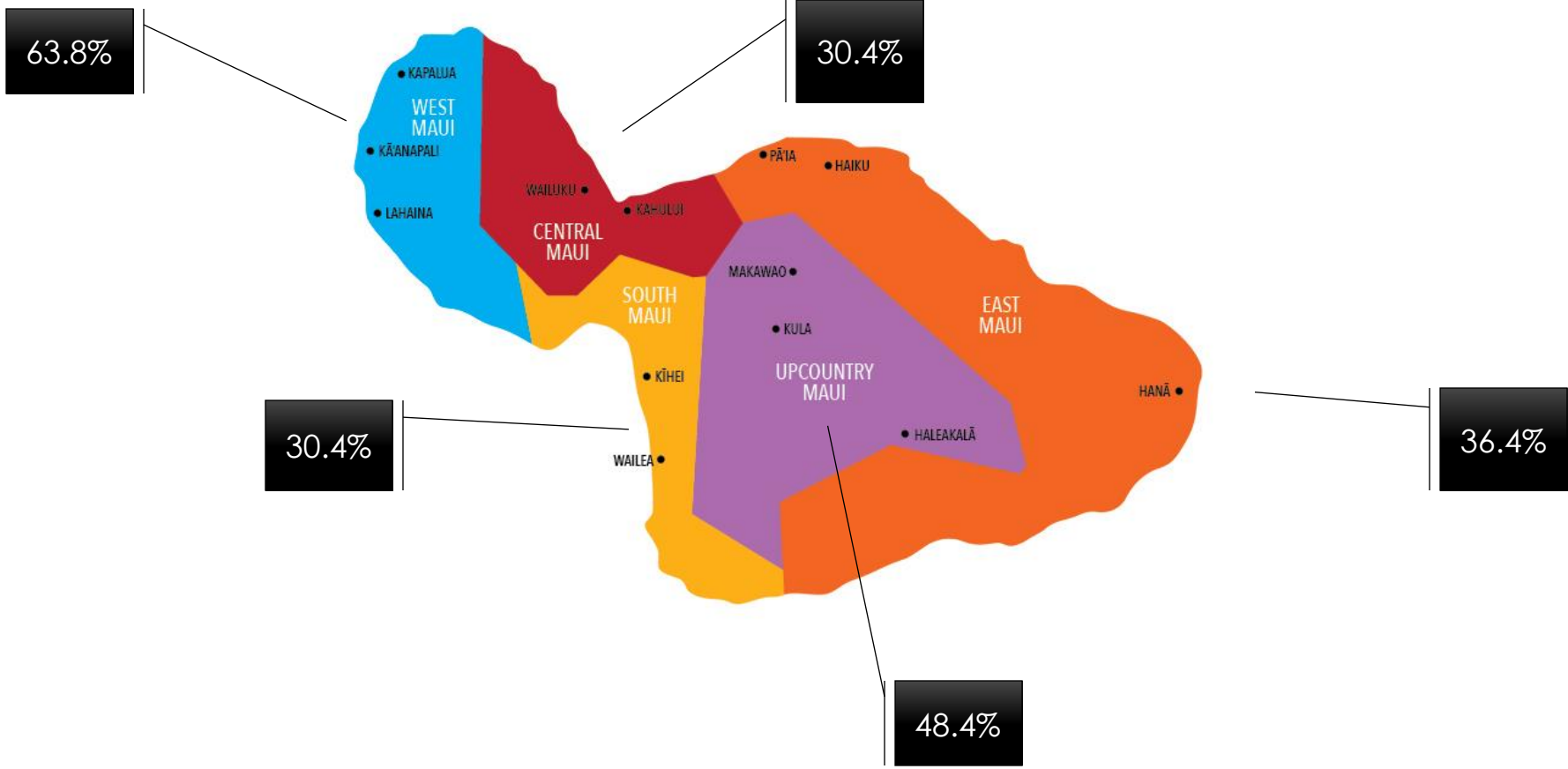
AREAS VISITED MAUI OCEANIA



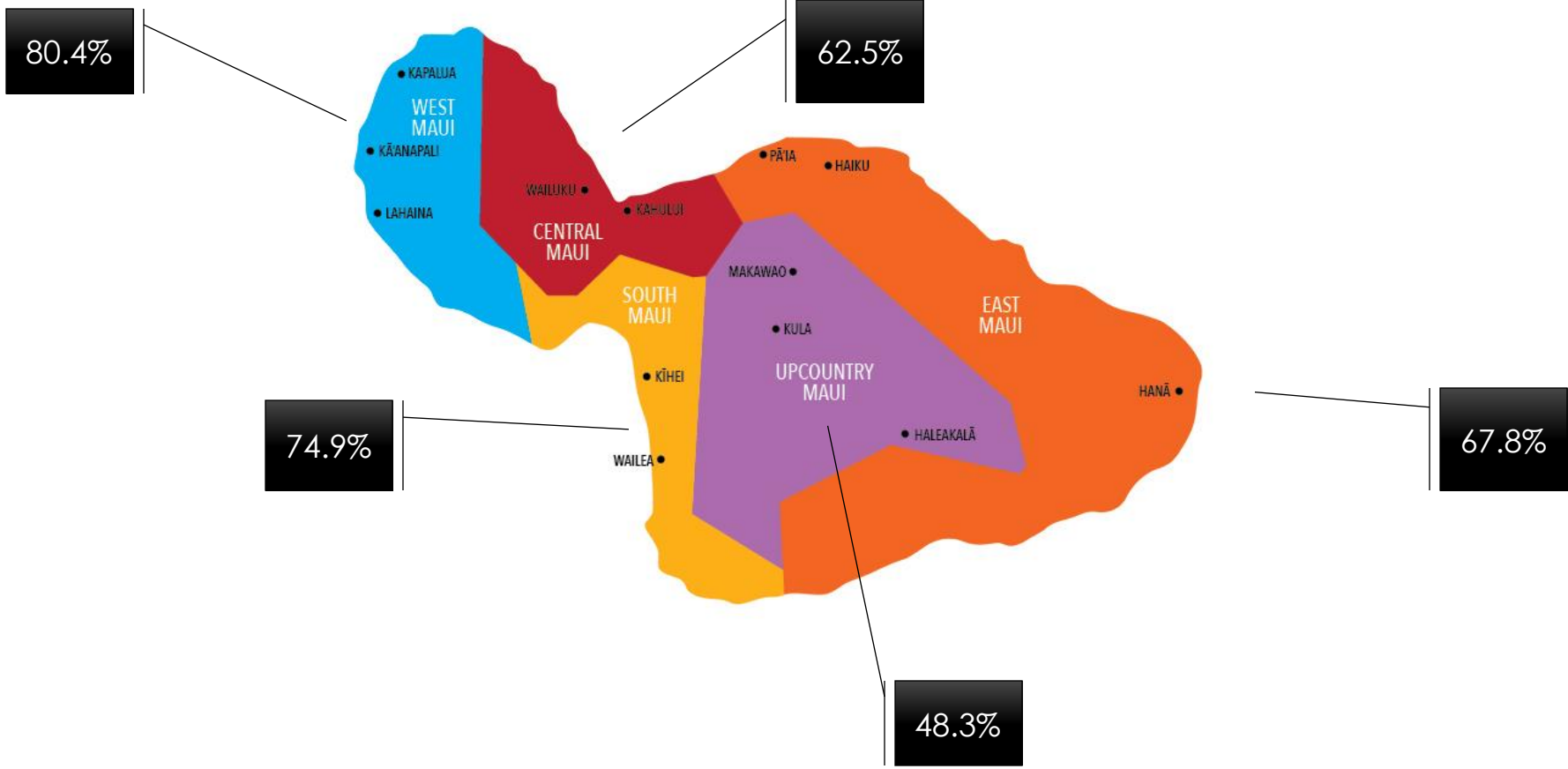
AREAS VISITED MAUI CHINA



AREAS VISITED MAUI KOREA



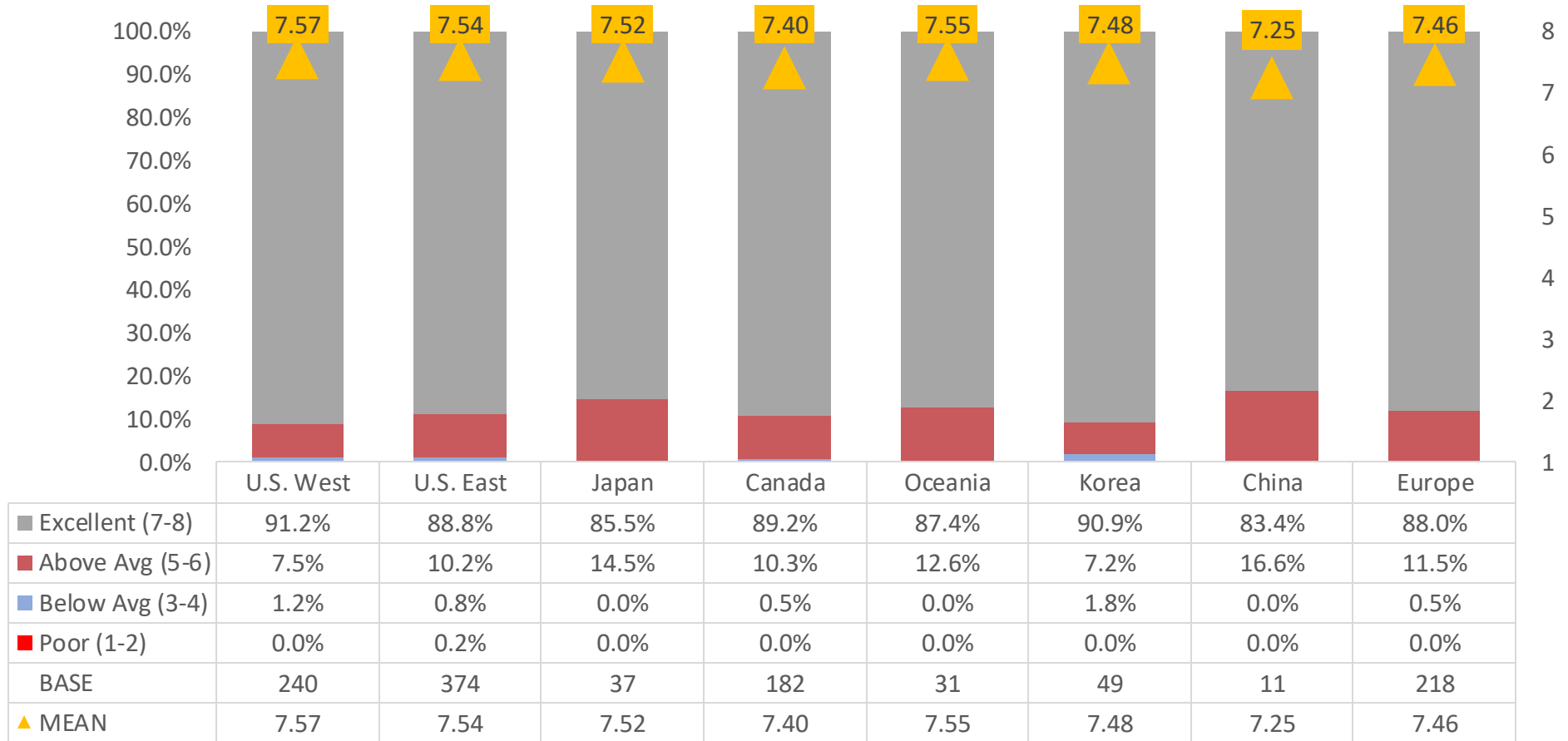
AREAS VISITED MAUI EUROPE



Section 8 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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



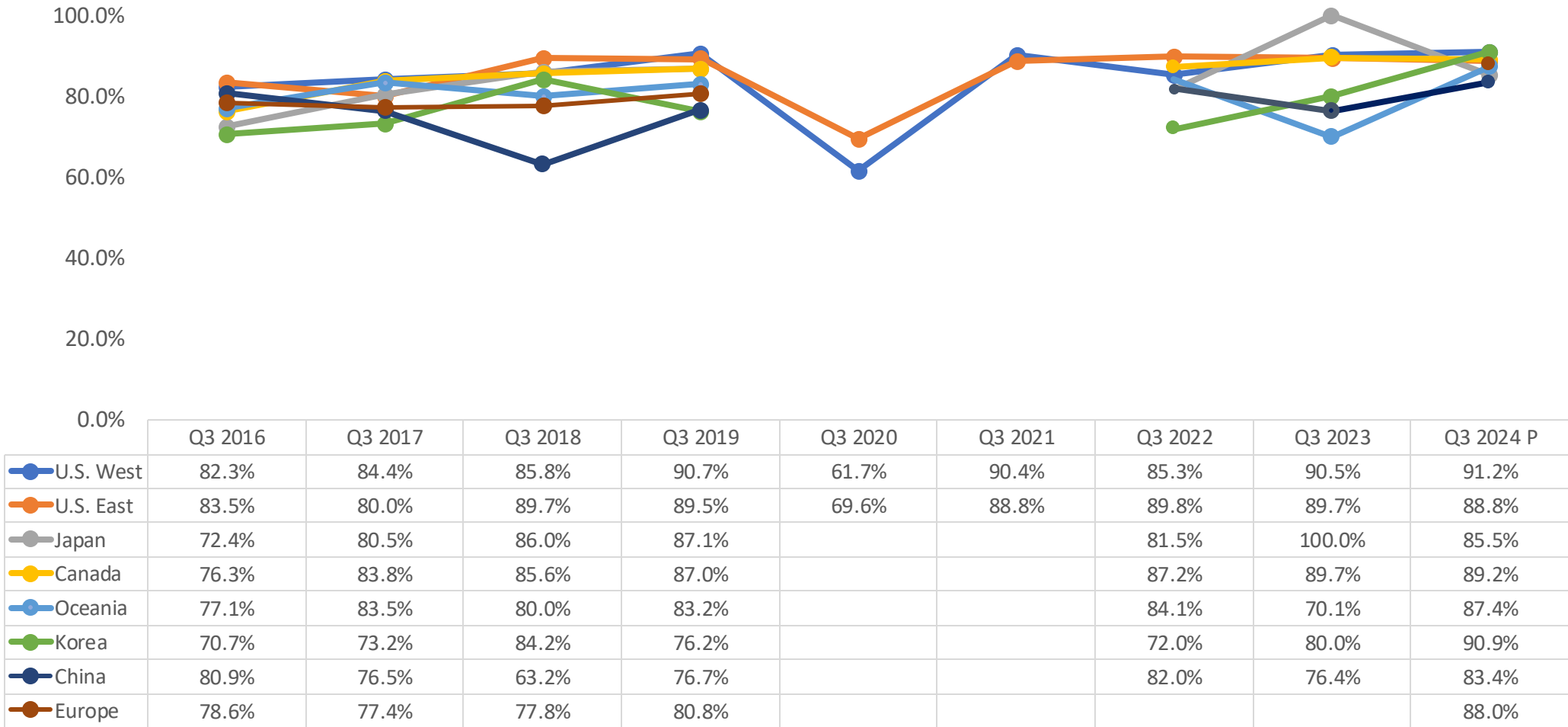
SATISFACTION - ISLAND OF HAWAI'I

- **Islands visited:** Visitors from **U.S. West** whose trip was limited to just the Island of Hawai'i gave higher satisfaction scores compared to those who also visited another island during their stay.
- **Household income:** Those residing in homes in the bottom income tier (<\$100K) from **U.S. West** gave higher satisfaction scores than more affluent visitors.

SATISFACTION - ISLAND OF HAWAII

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

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

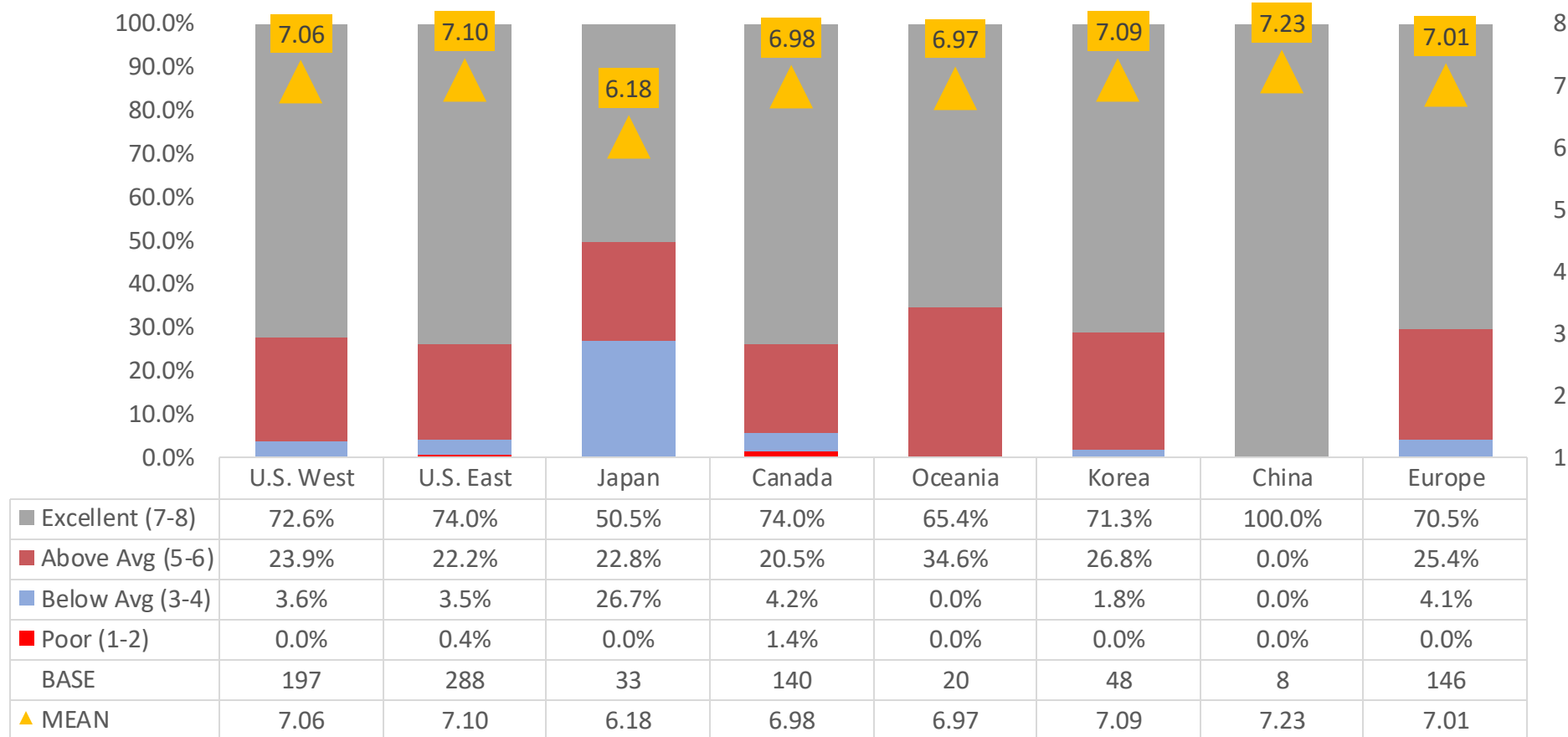


P= Preliminary Data

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

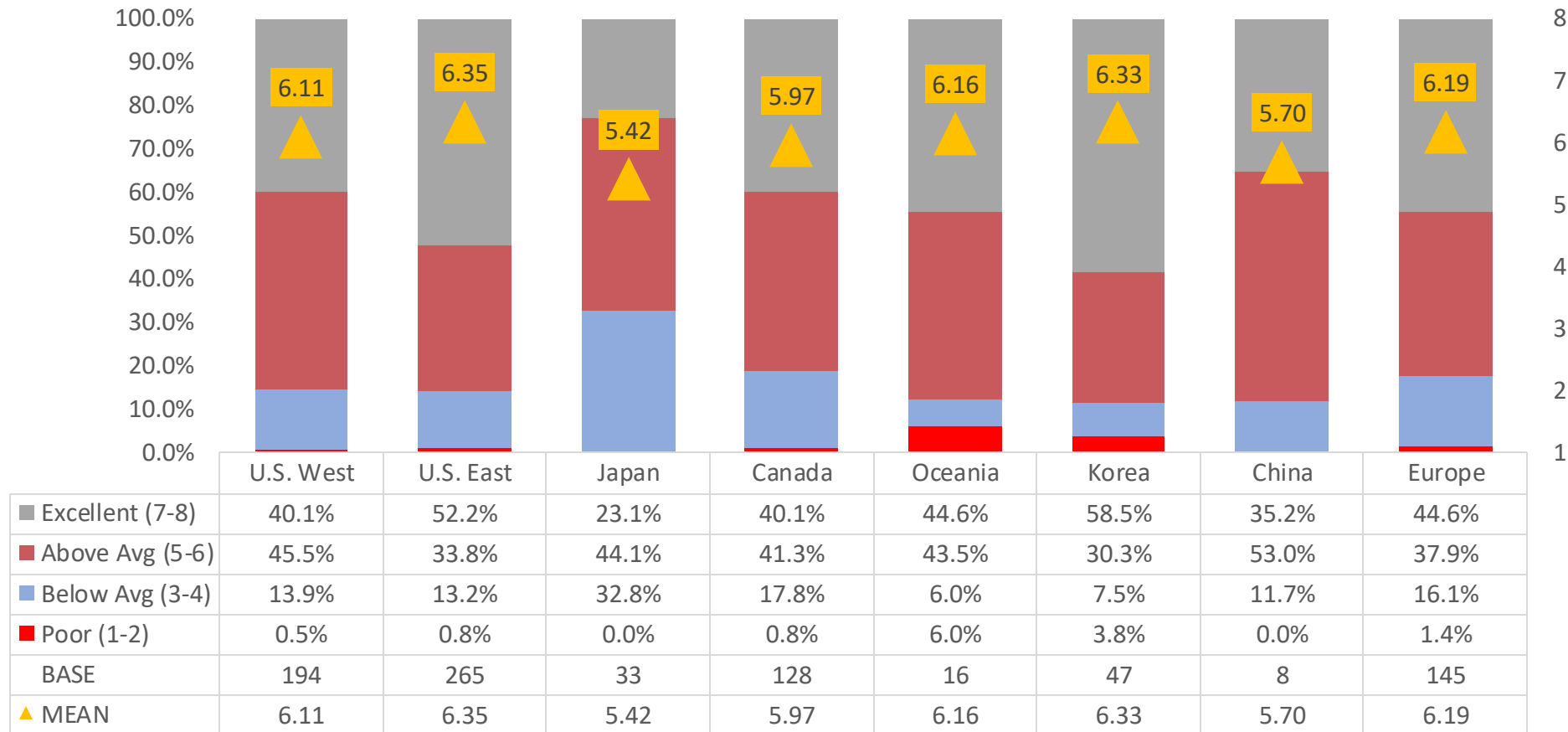
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



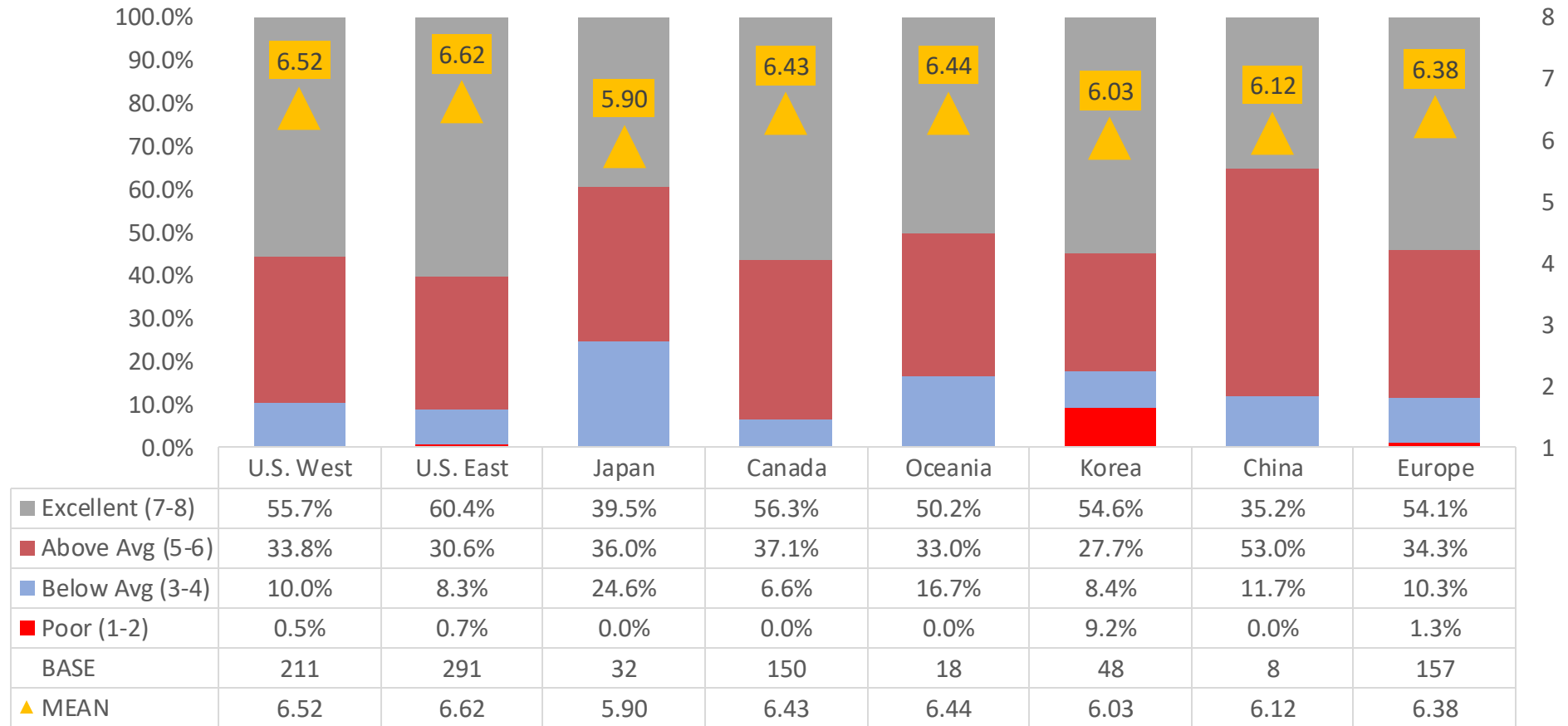
SHOPPING - ISLAND OF HAWAI‘I

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



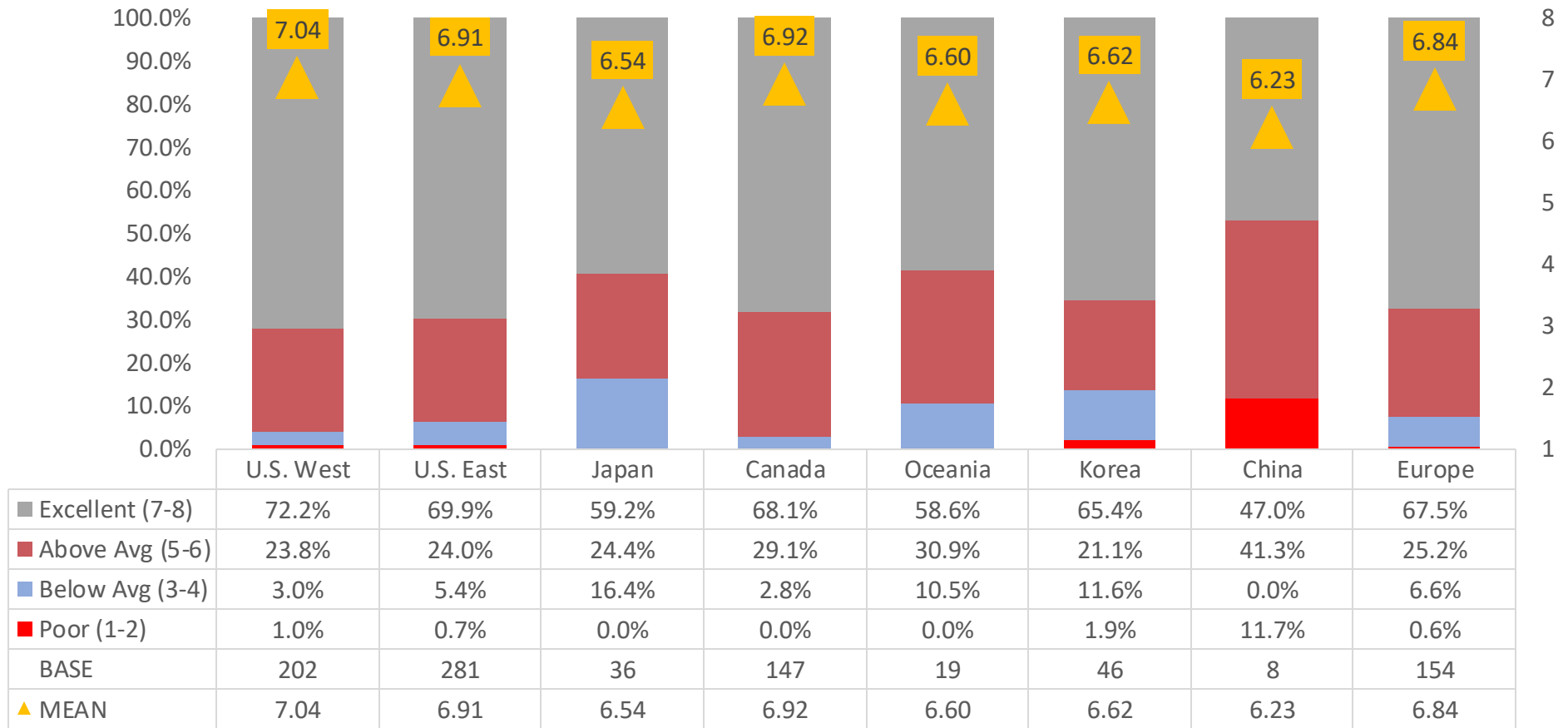
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



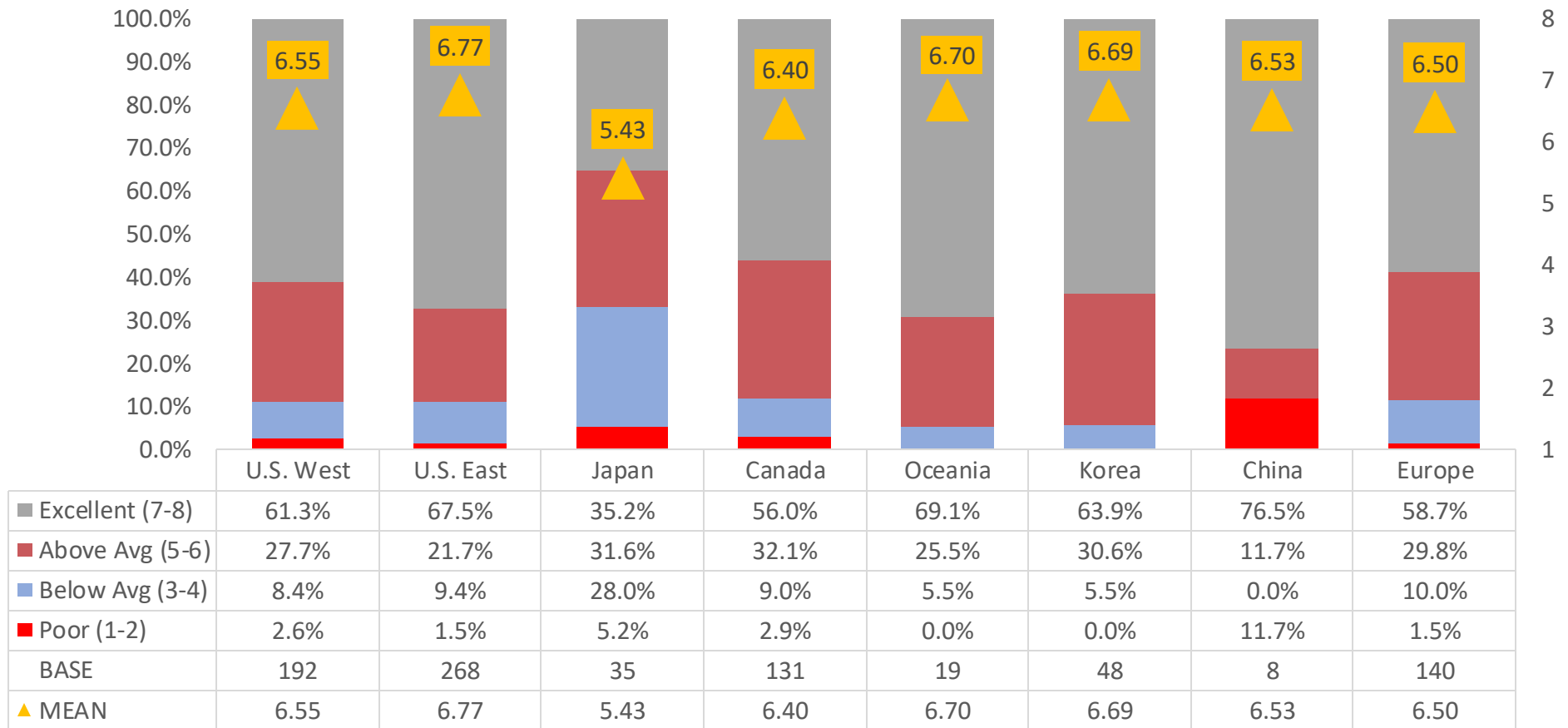
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



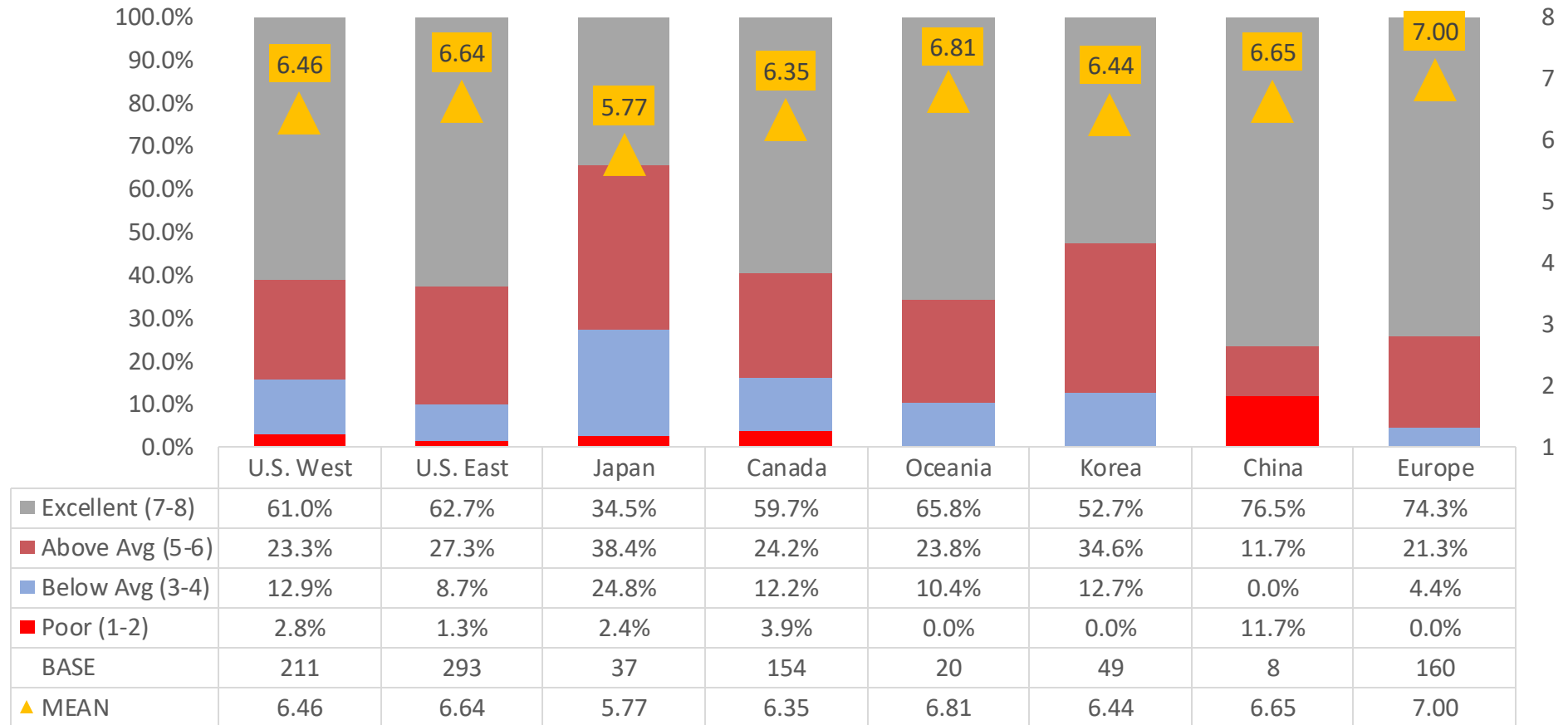
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



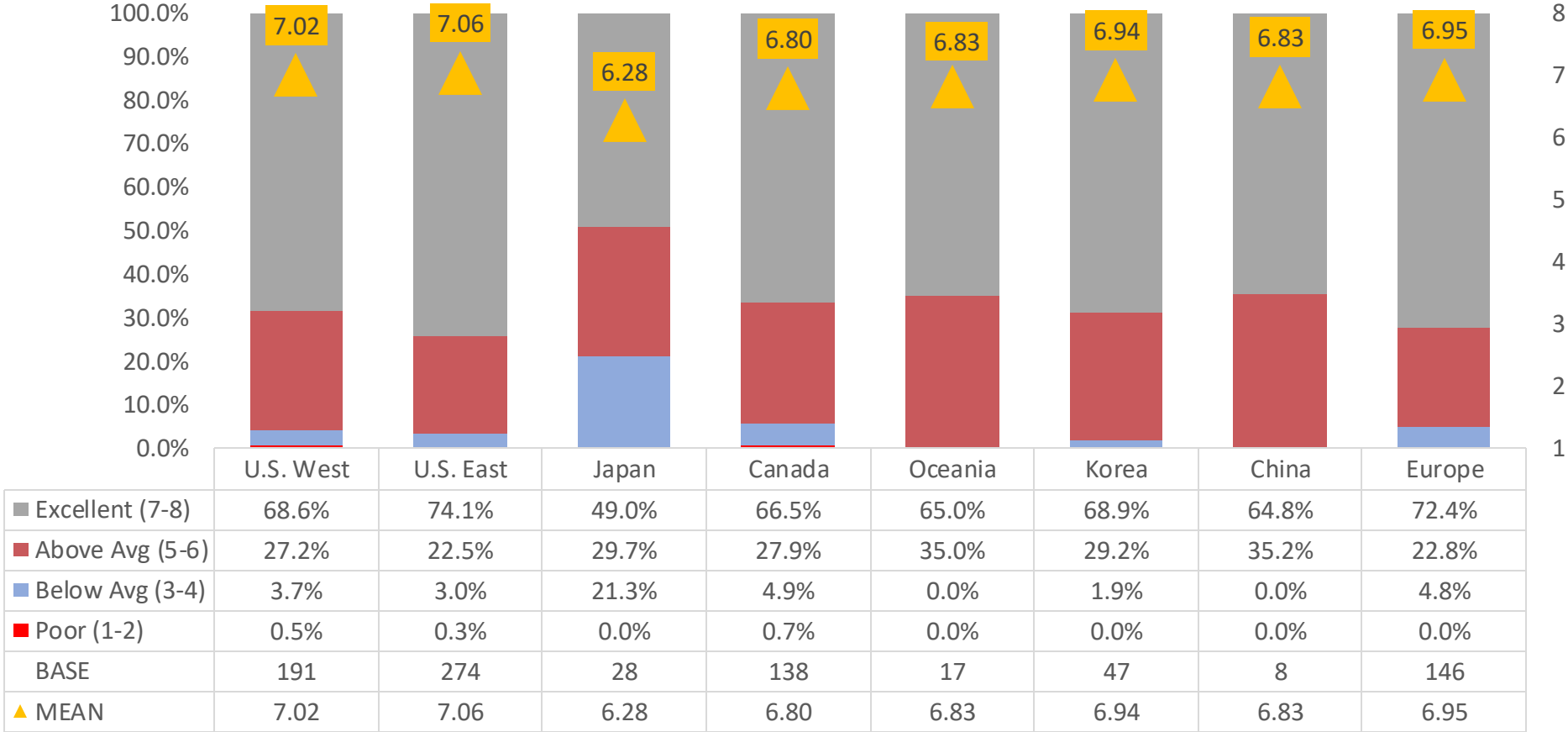
AIRPORT- ISLAND OF HAWAI‘I

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



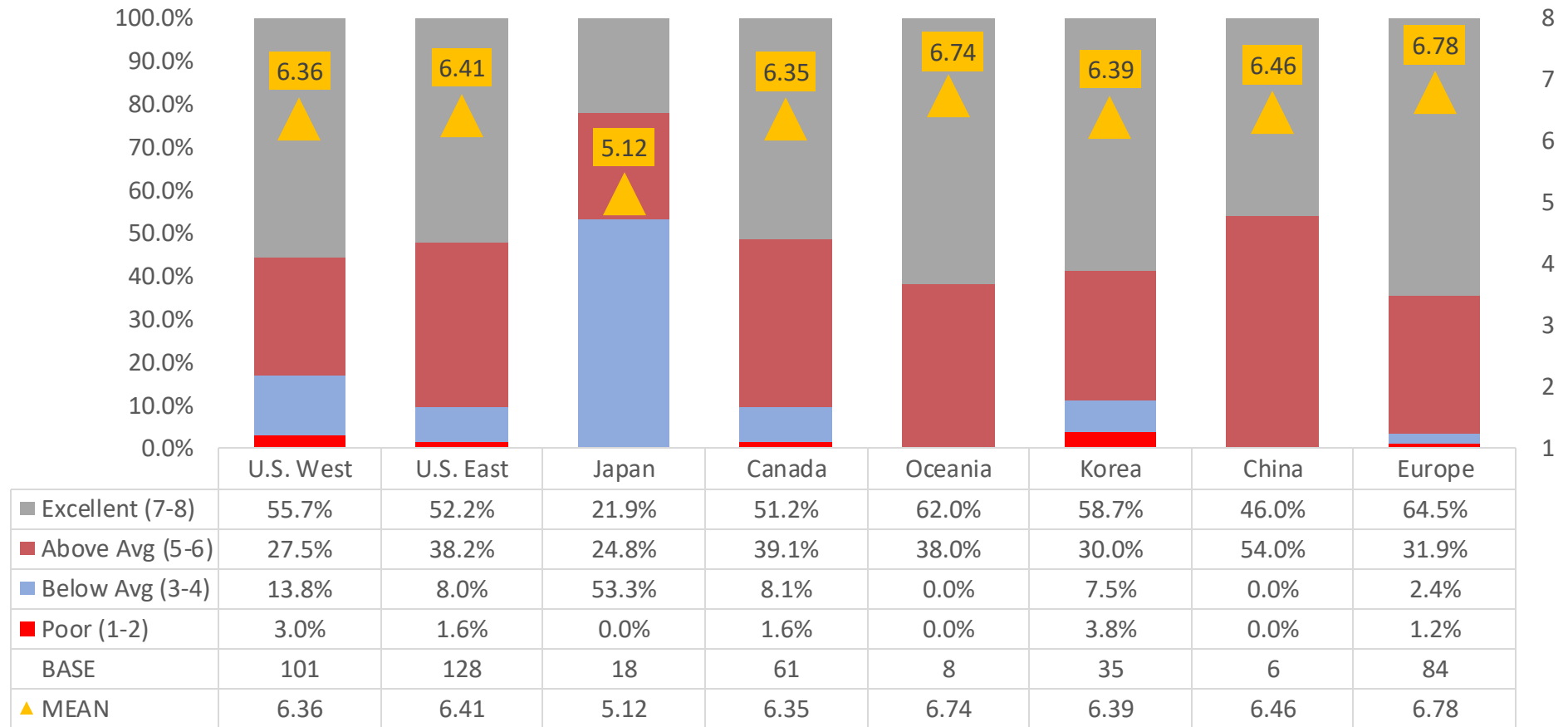
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



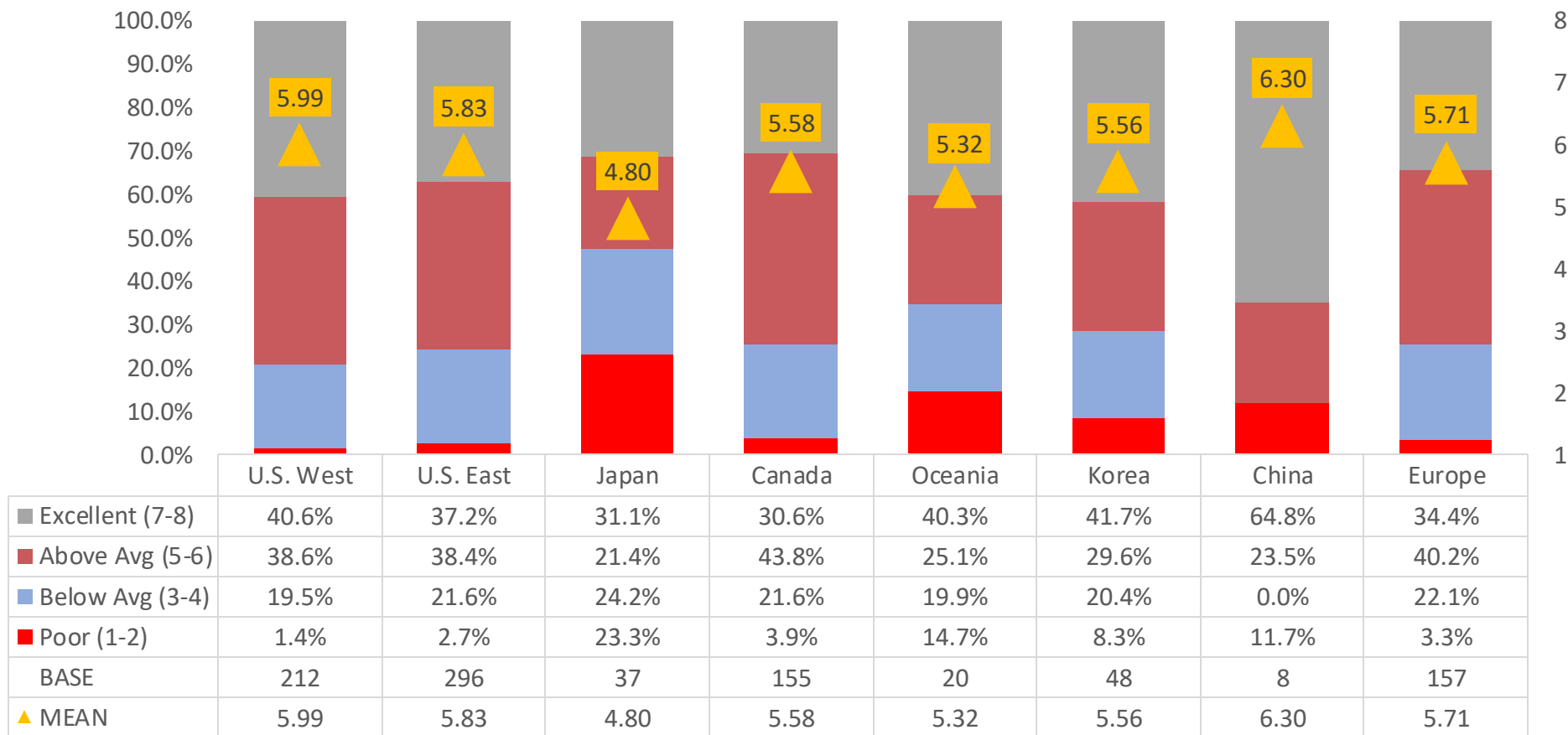
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



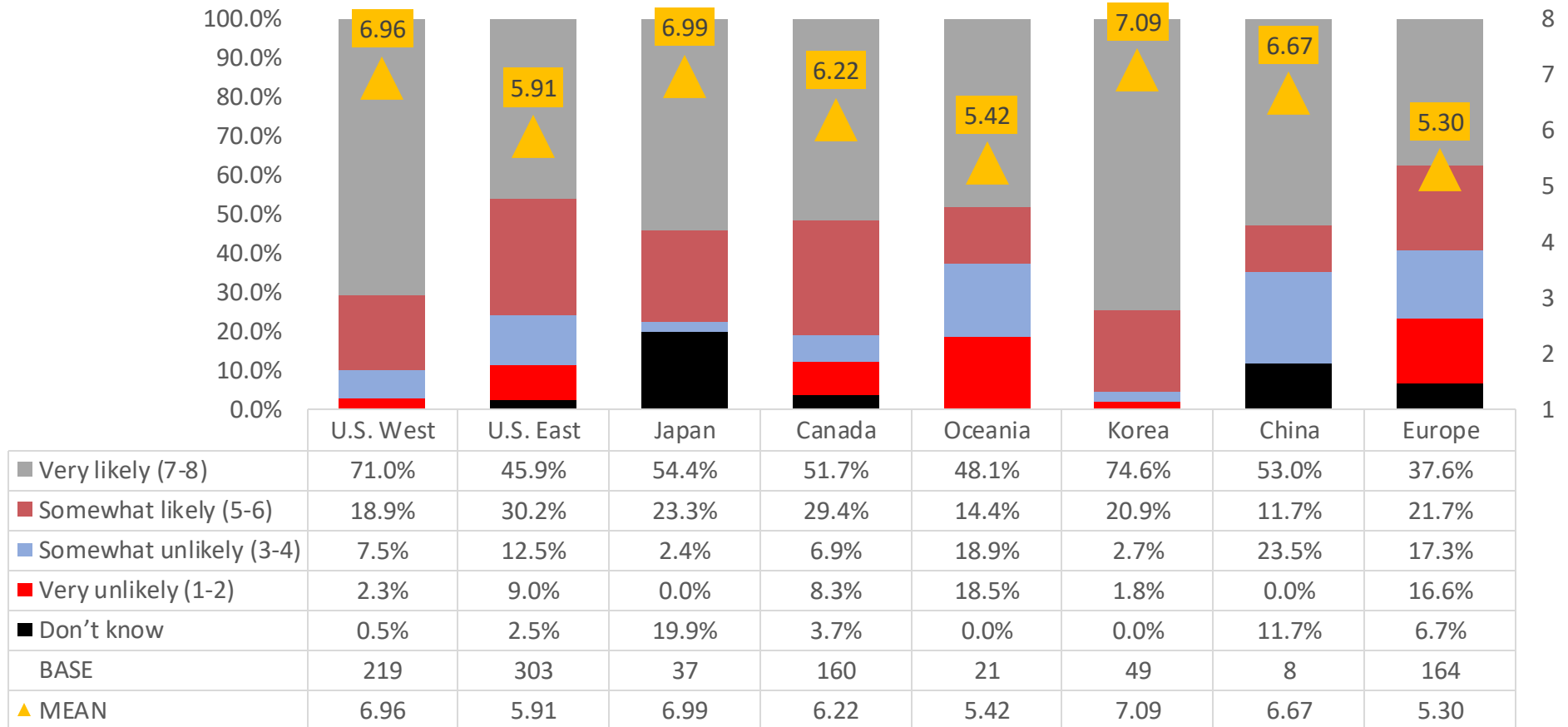
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



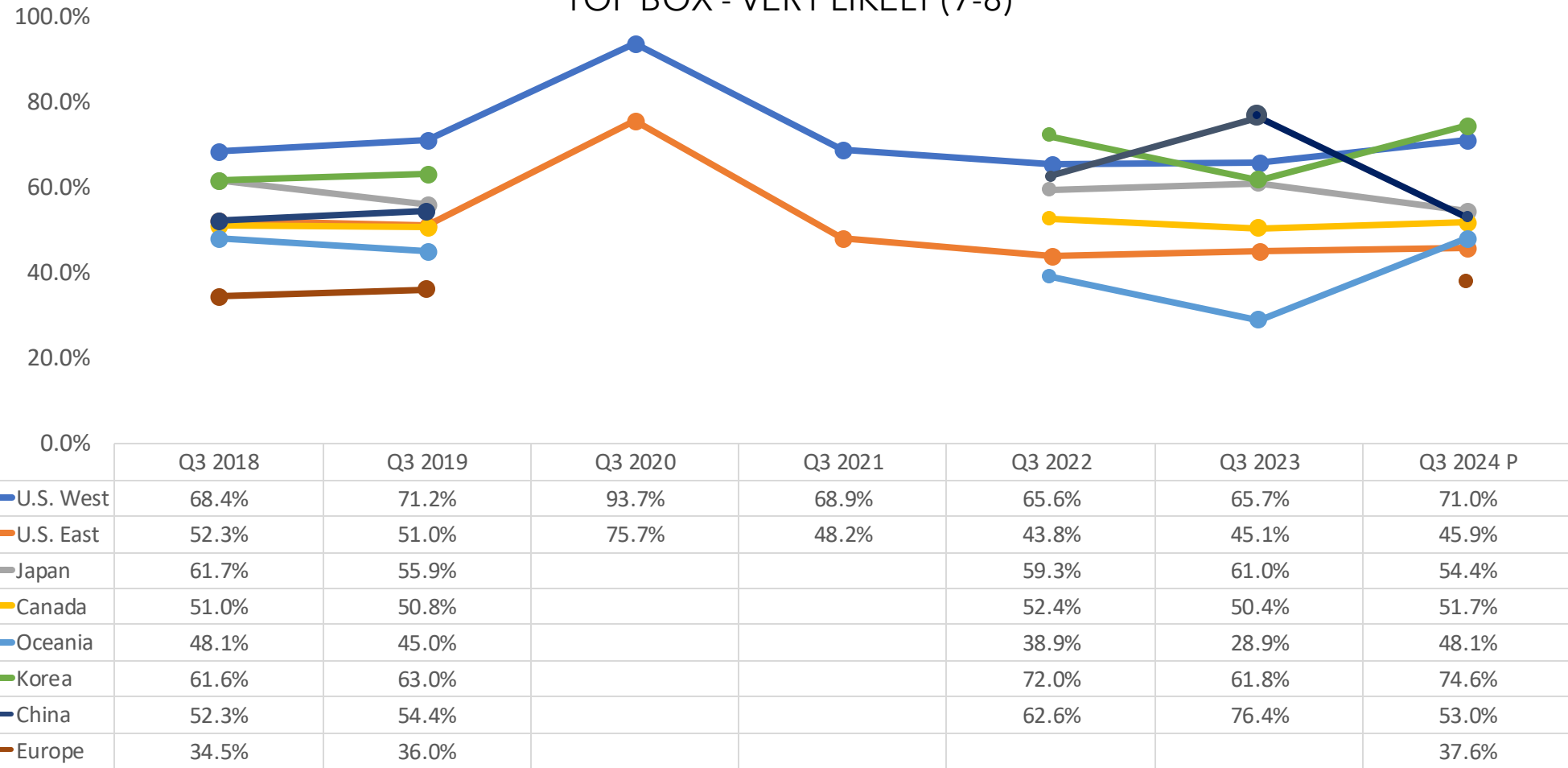
LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)



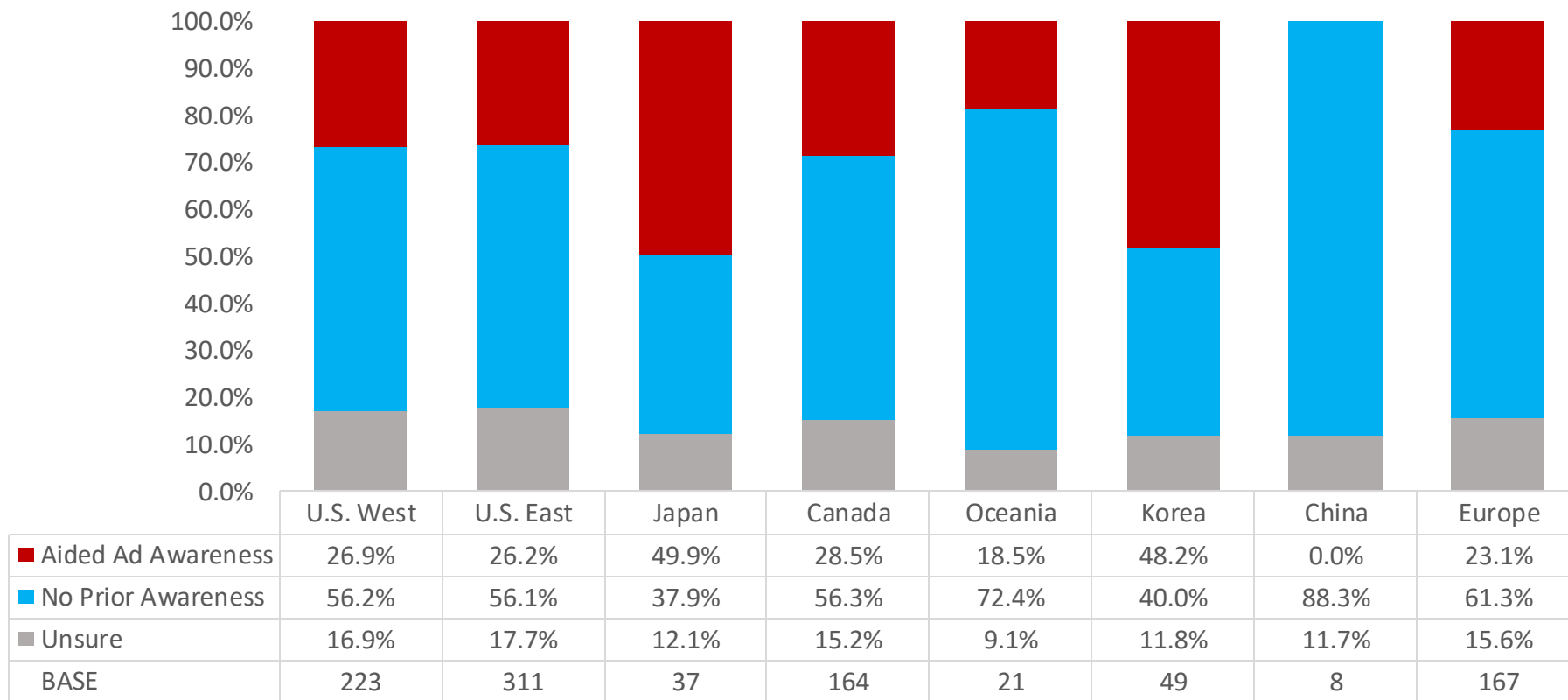
P= Preliminary Data

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. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.



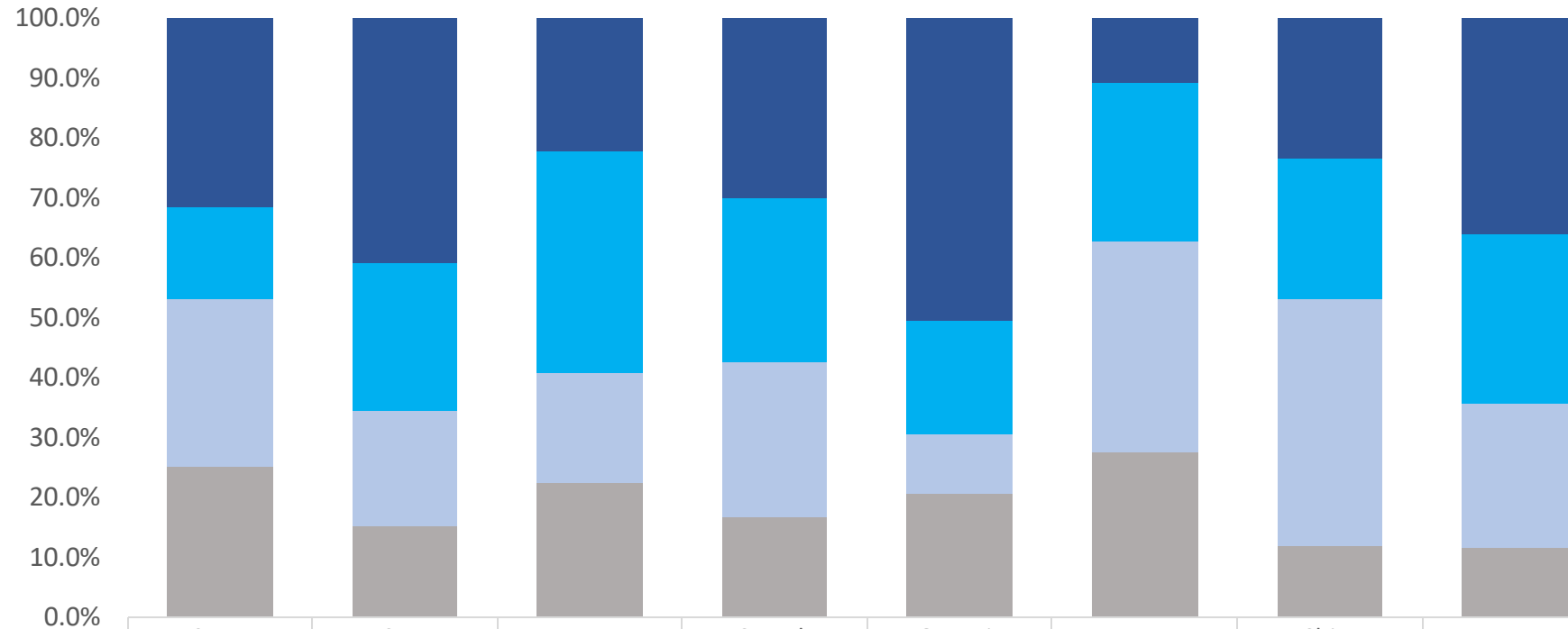
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

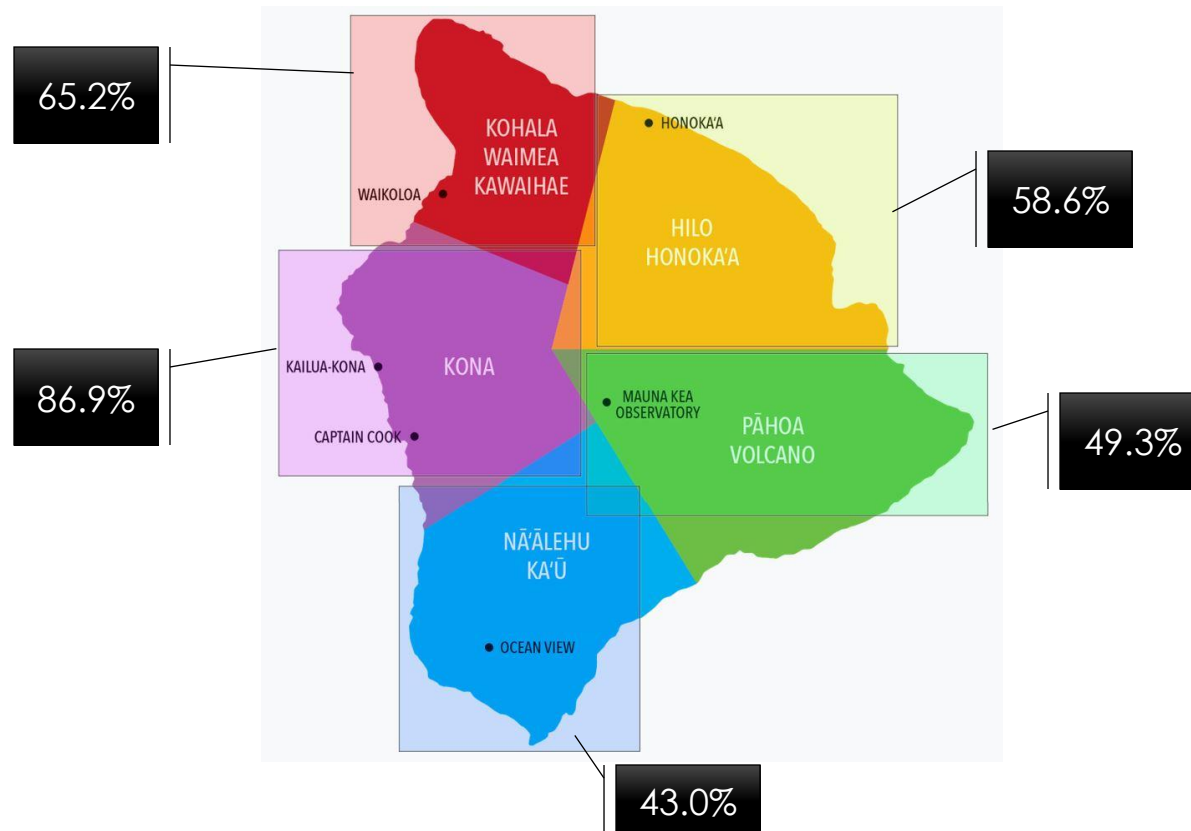
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Famous landmarks or imagery/ natural beauty	46.9%	62.9%	60.7%	51.0%	61.7%	58.7%	70.9%	66.7%
Outdoor or sporting activities and events	21.6%	15.3%	12.1%	31.7%	29.2%	11.7%	8.2%	17.5%
Social media posts and videos	9.6%	11.8%	17.0%	12.2%	18.5%	11.7%	20.9%	17.9%
Hawaiian cultural events	11.2%	13.9%	16.0%	11.5%	23.9%	11.7%	0.0%	12.0%
Television programs or movies filmed in Hawai'i	6.7%	8.2%	18.4%	6.2%	27.6%	11.7%	20.0%	21.0%
Hawaiian music	12.6%	5.6%	17.5%	6.7%	9.1%	0.0%	0.0%	9.5%
BASE	223	311	37	164	21	8	49	167

TRAVEL ON ISLAND OF HAWAI'I

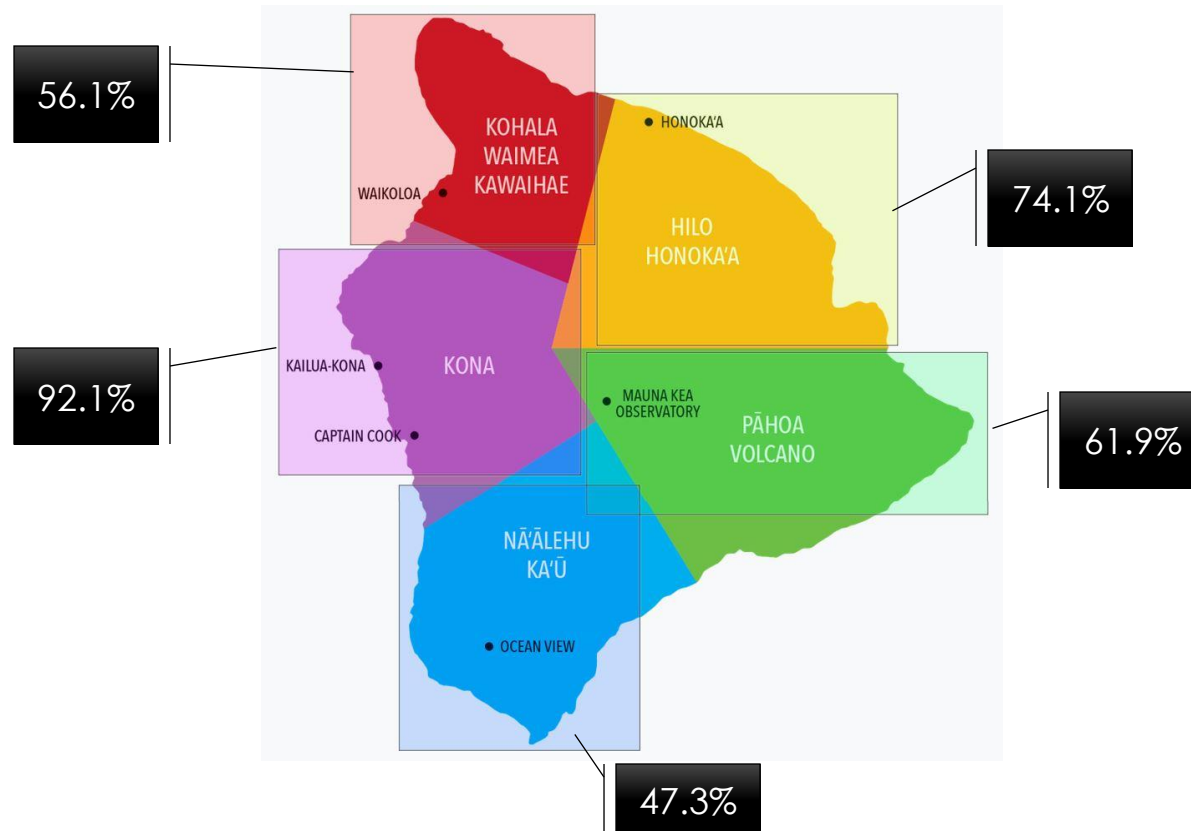


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Traveled to other side of island	31.5%	41.0%	22.3%	30.1%	50.6%	10.9%	23.5%	36.2%
Traveled more than 1 hour one way to reach activities	15.5%	24.5%	36.9%	27.3%	19.1%	26.4%	23.5%	28.2%
Traveled 1 hour or less one way to reach activity	28.0%	19.2%	18.4%	26.1%	10.0%	35.4%	41.3%	24.1%
Enjoy activities- short drive from accommodations	25.0%	15.2%	22.3%	16.4%	20.3%	27.3%	11.7%	11.5%
BASE	207	290	37	151	20	49	8	157

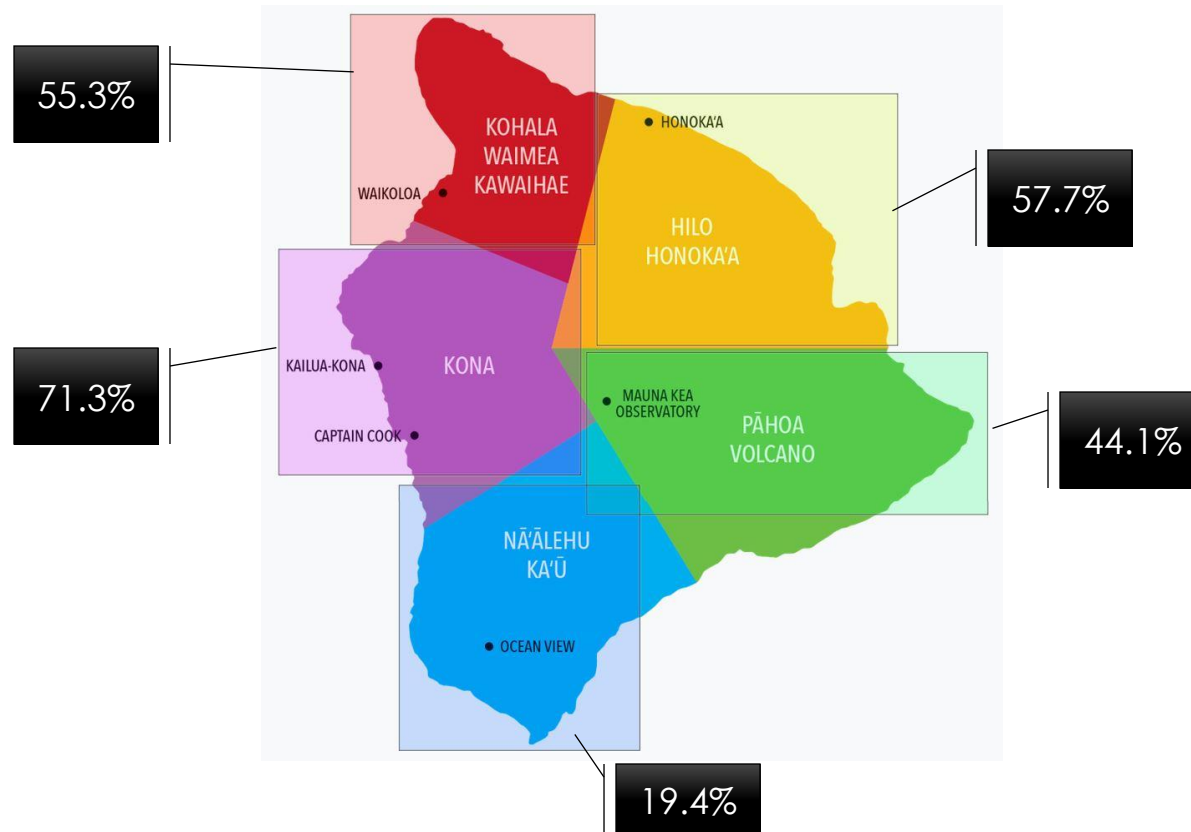
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



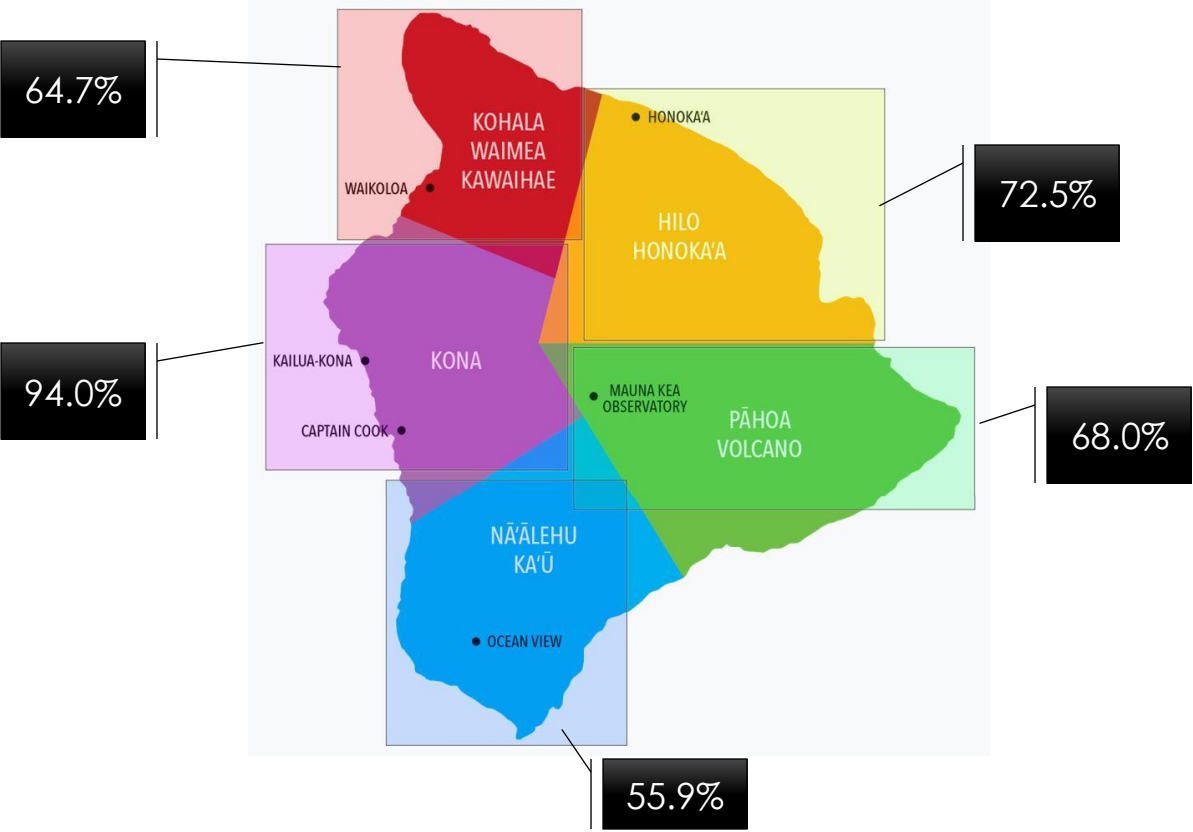
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



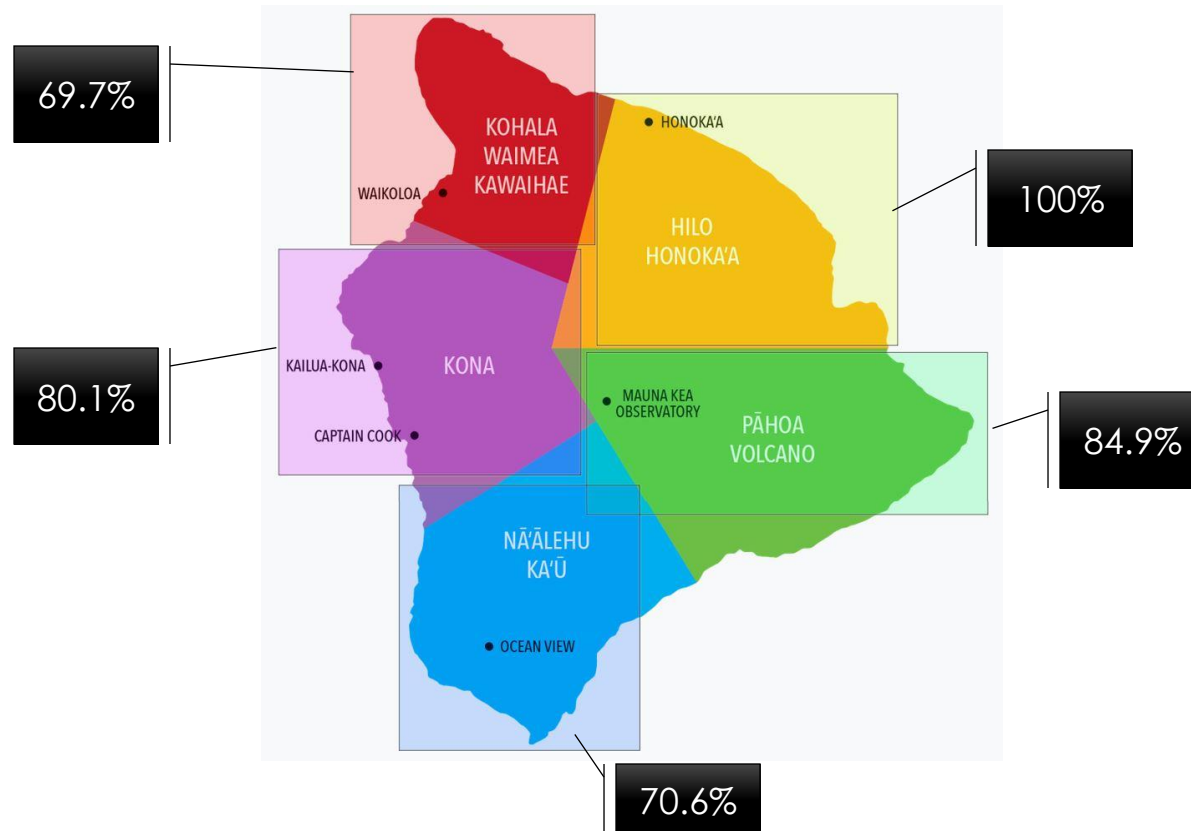
AREAS VISITED ISLAND OF HAWAI'I JAPAN



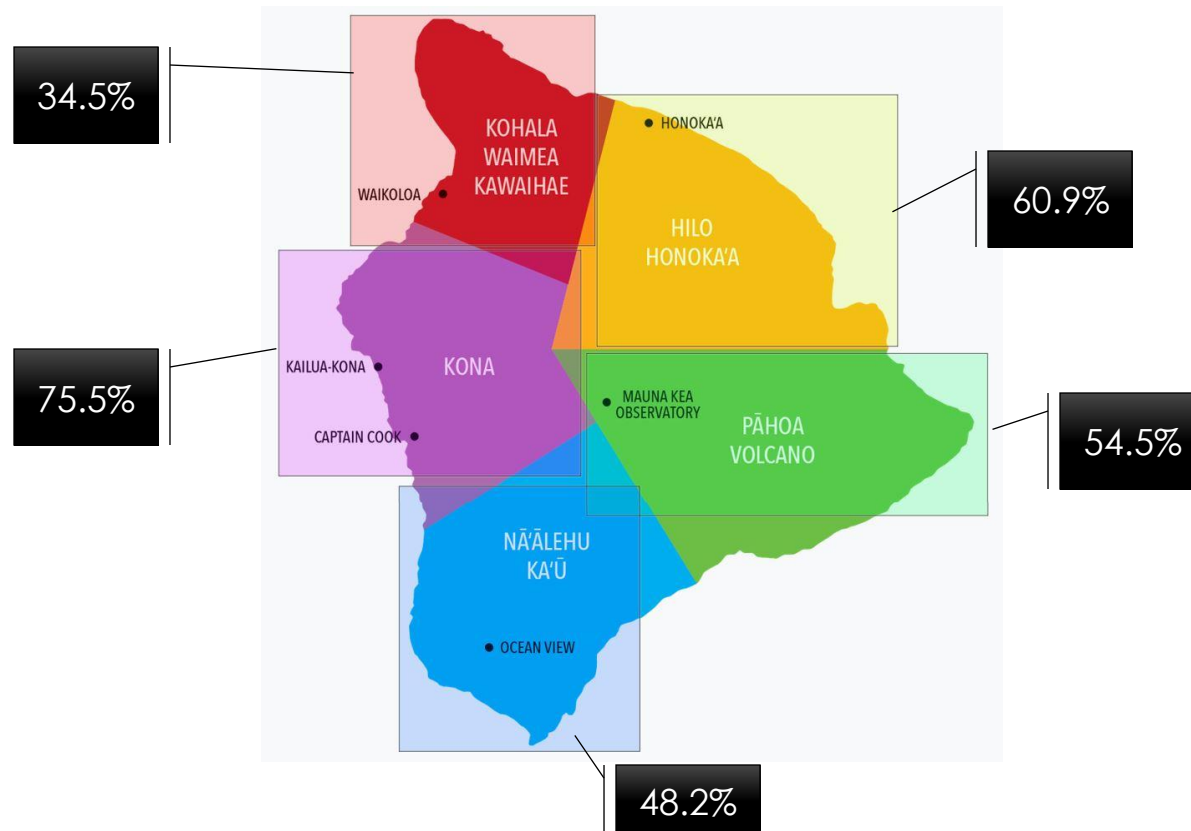
AREAS VISITED ISLAND OF HAWAI'I CANADA



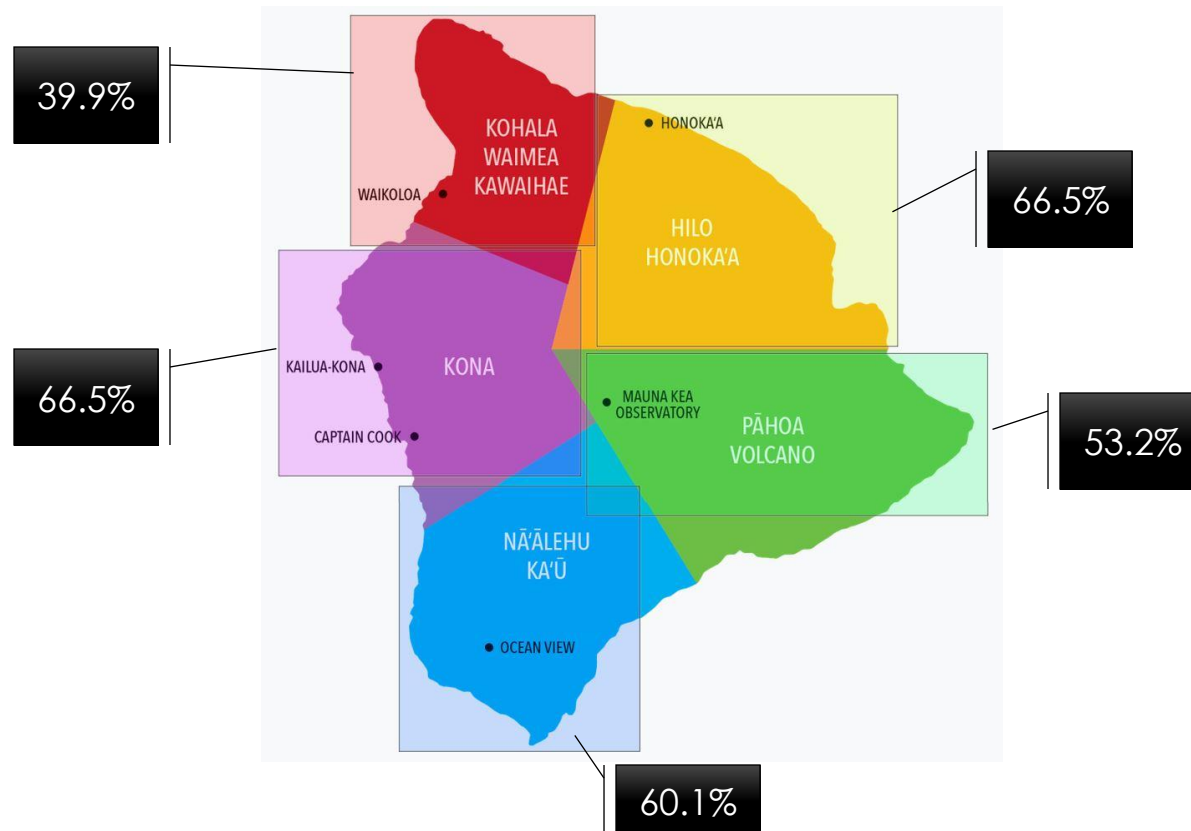
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



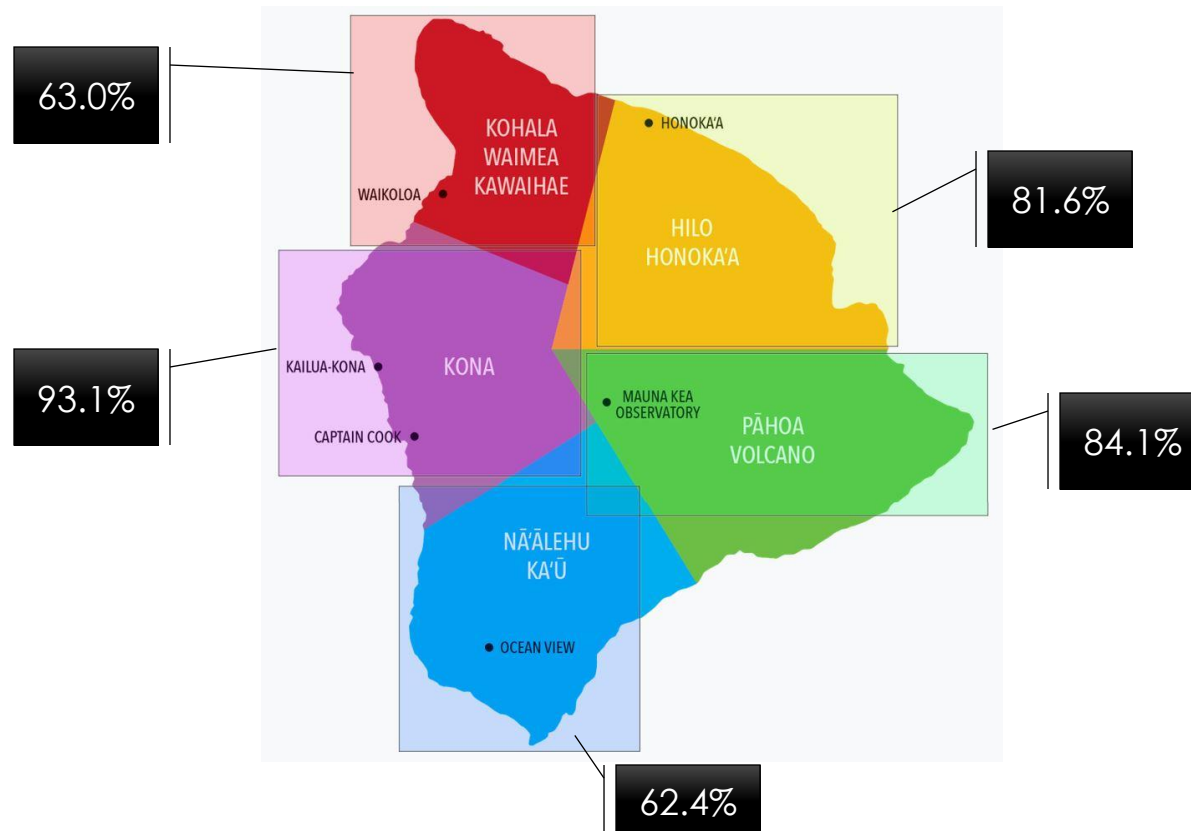
AREAS VISITED ISLAND OF HAWAI'I KOREA



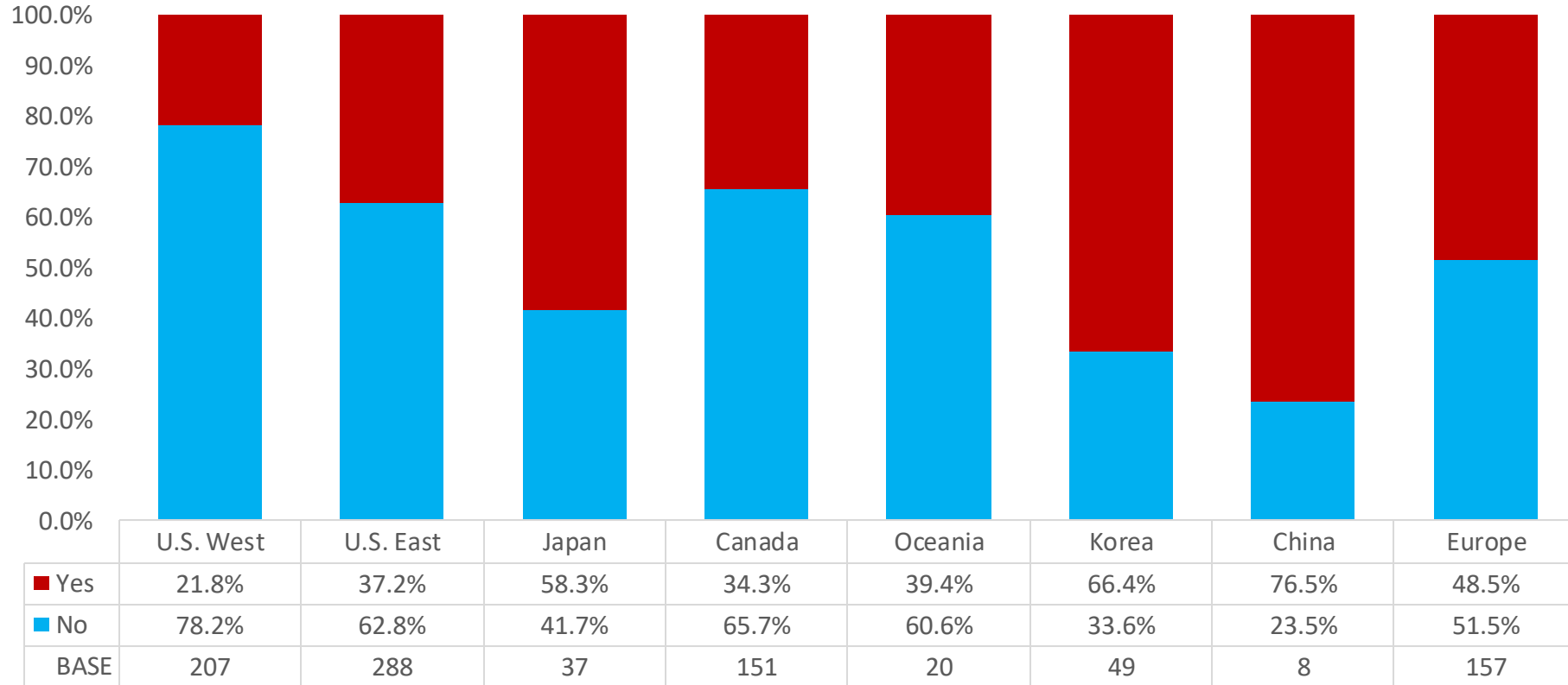
AREAS VISITED ISLAND OF HAWAI'I CHINA



AREAS VISITED ISLAND OF HAWAI'I EUROPE

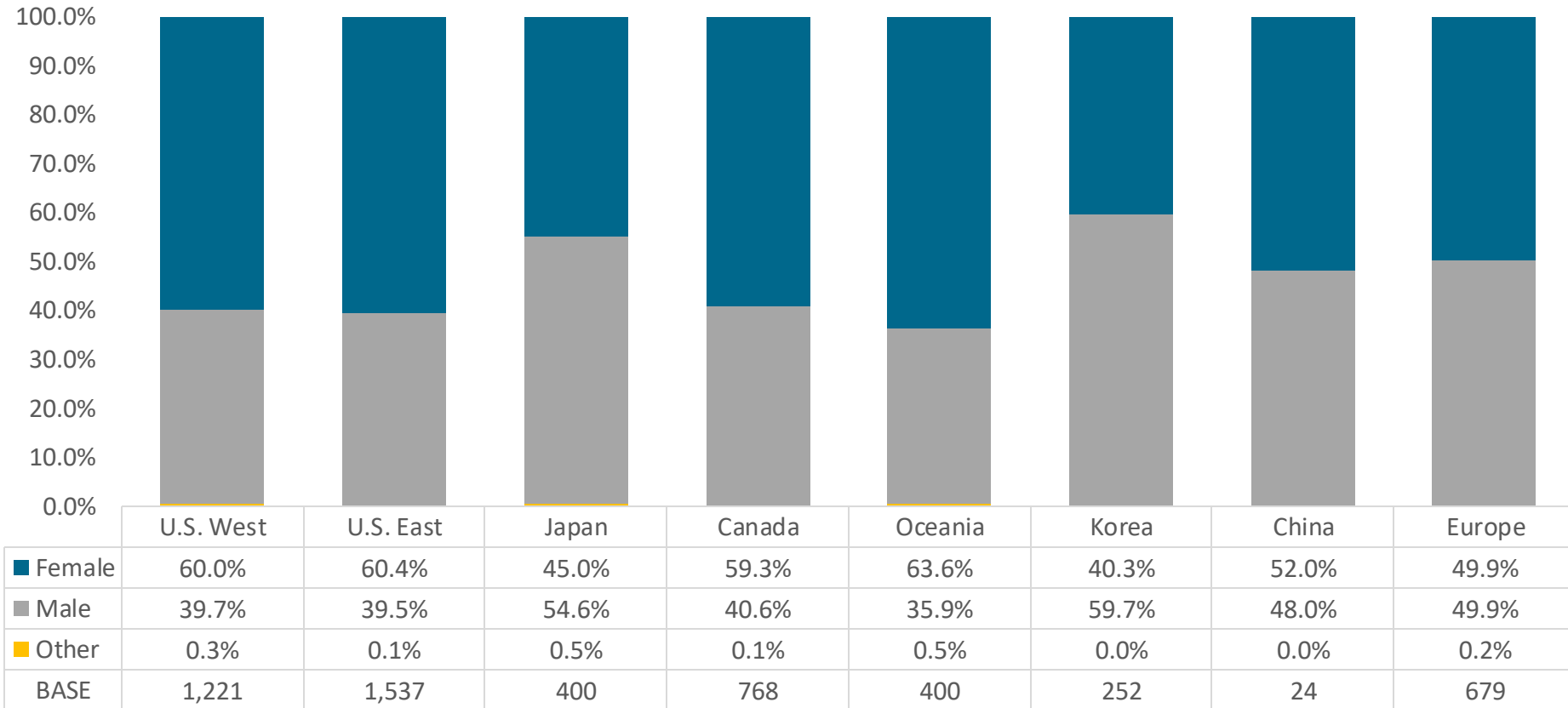


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

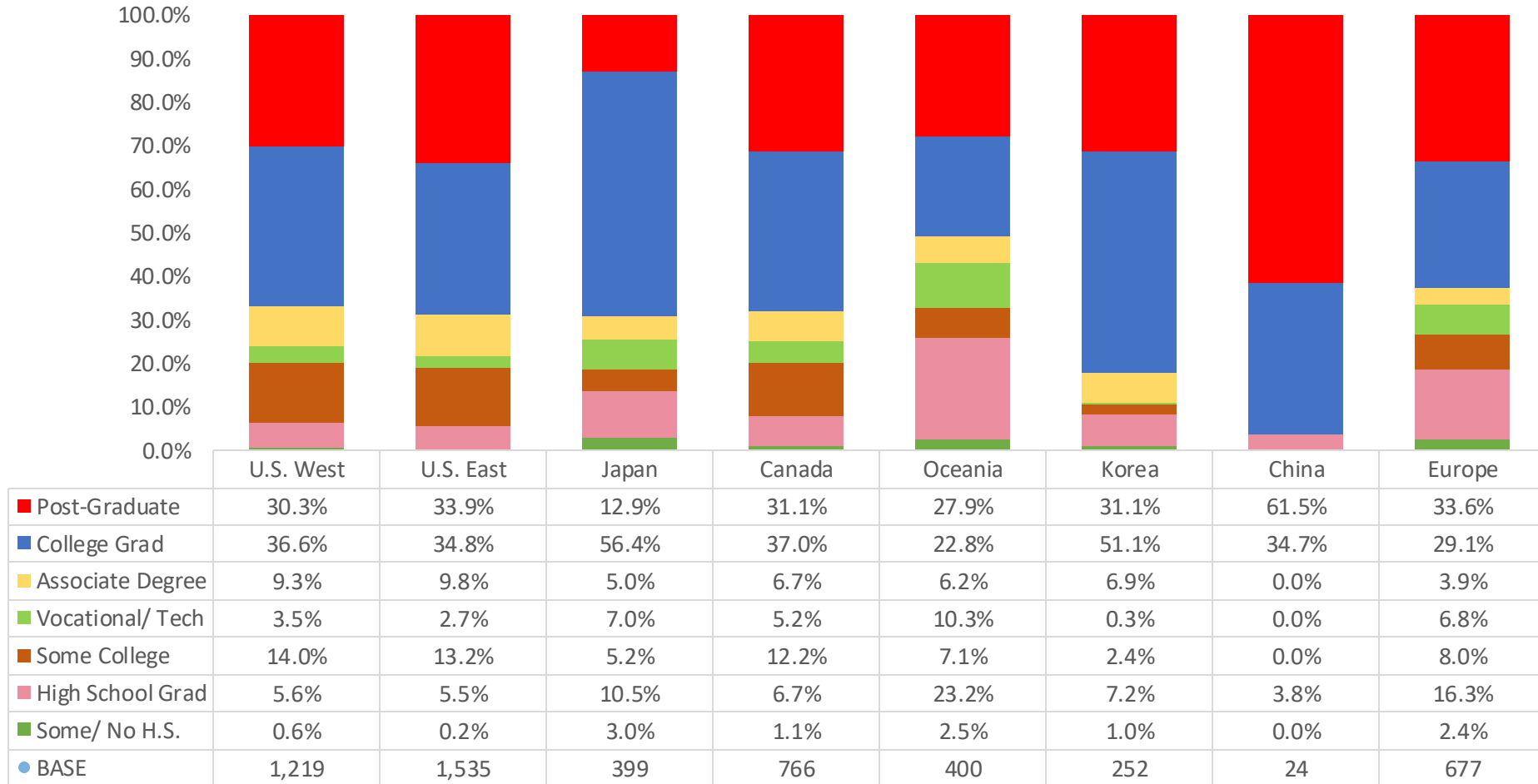


Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE - HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	4.2%	5.1%	2.8%	9.4%	13.8%
\$40,000 to \$59,999	5.0%	6.0%	4.8%	7.4%	14.3%
\$60,000 to \$79,999	8.5%	8.2%	8.7%	9.7%	11.6%
\$80,000 to \$99,999	7.2%	9.3%	10.5%	8.9%	9.0%
\$100,000 to \$124,999	12.7%	12.1%	14.3%	12.7%	11.8%
\$125,000 to \$149,999	11.3%	11.0%	10.4%	12.7%	9.6%
\$150,000 to \$174,999	10.4%	9.6%	10.1%	7.4%	8.0%
\$175,000 to \$199,999	8.7%	7.3%	9.2%	10.0%	4.3%
\$200,000 to \$249,999	12.5%	11.0%	11.2%	9.1%	6.8%
\$250,000 +	19.5%	20.4%	17.9%	12.6%	10.8%

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	6.1%
¥3.5 - ¥4.5 million	8.1%
¥4.5 - ¥5.5 million	6.7%
¥5.5 - ¥6.5 million	4.9%
¥6.5 - ¥7.5 million	6.2%
¥7.5 - ¥8.5 million	10.3%
¥8.5 - ¥10.0 million	11.7%
¥10.0 - ¥15.0 million	21.0%
¥15.0 - ¥20.0 million	11.5%
¥20.0 million +	13.6%

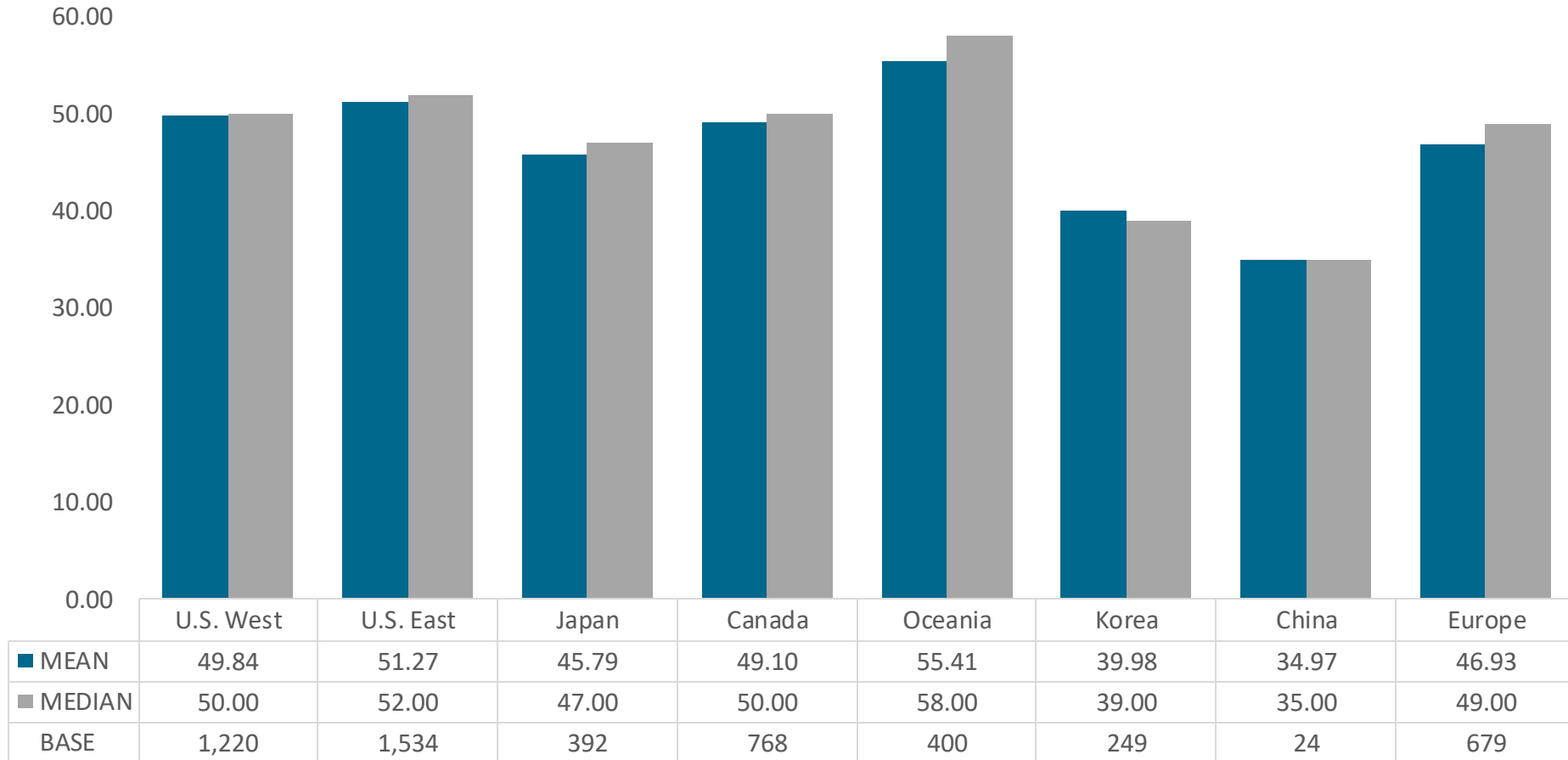
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	9.5%
₩16,305,000 - ₩27,173,999	5.2%
₩27,174,000 - ₩38,041,999	2.5%
₩38,042,000 - ₩48,911,999	5.7%
₩48,912,000 - ₩59,781,999	7.3%
₩59,782,000 - ₩70,652,999	10.6%
₩70,653,000 - ₩81,520,999	9.8%
₩81,521,000 - ₩92,390,999	5.4%
₩92,391,000 - ₩103,259,999	10.4%
₩103,260,000 - ₩149,999,999	14.3%
₩150,000,000 - ₩199,999,999	5.4%
₩200,000,000+	14.0%

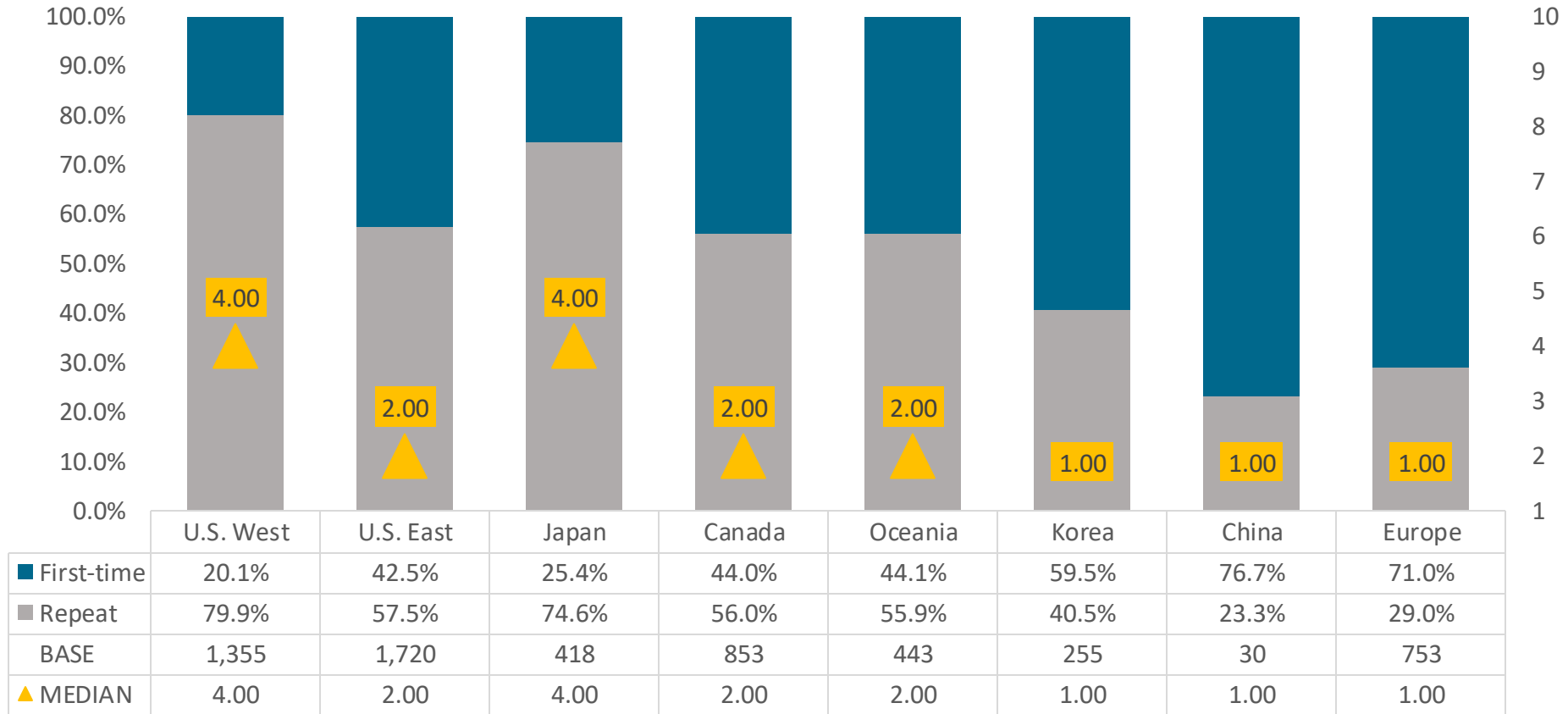
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	8.3%
¥250,800 – ¥376,099	8.3%
¥376,100 – ¥501,399	12.5%
¥501,400 – ¥626,799	16.6%
¥626,800 – ¥783,499	4.2%
¥783,500 – ¥940,199	22.9%
¥940,200 – ¥1,096,899	4.2%
¥1,096,900 - ¥1,253,599	-
¥1,253,600 – ¥1,560,799	10.5%
¥1,560,800+	12.6%

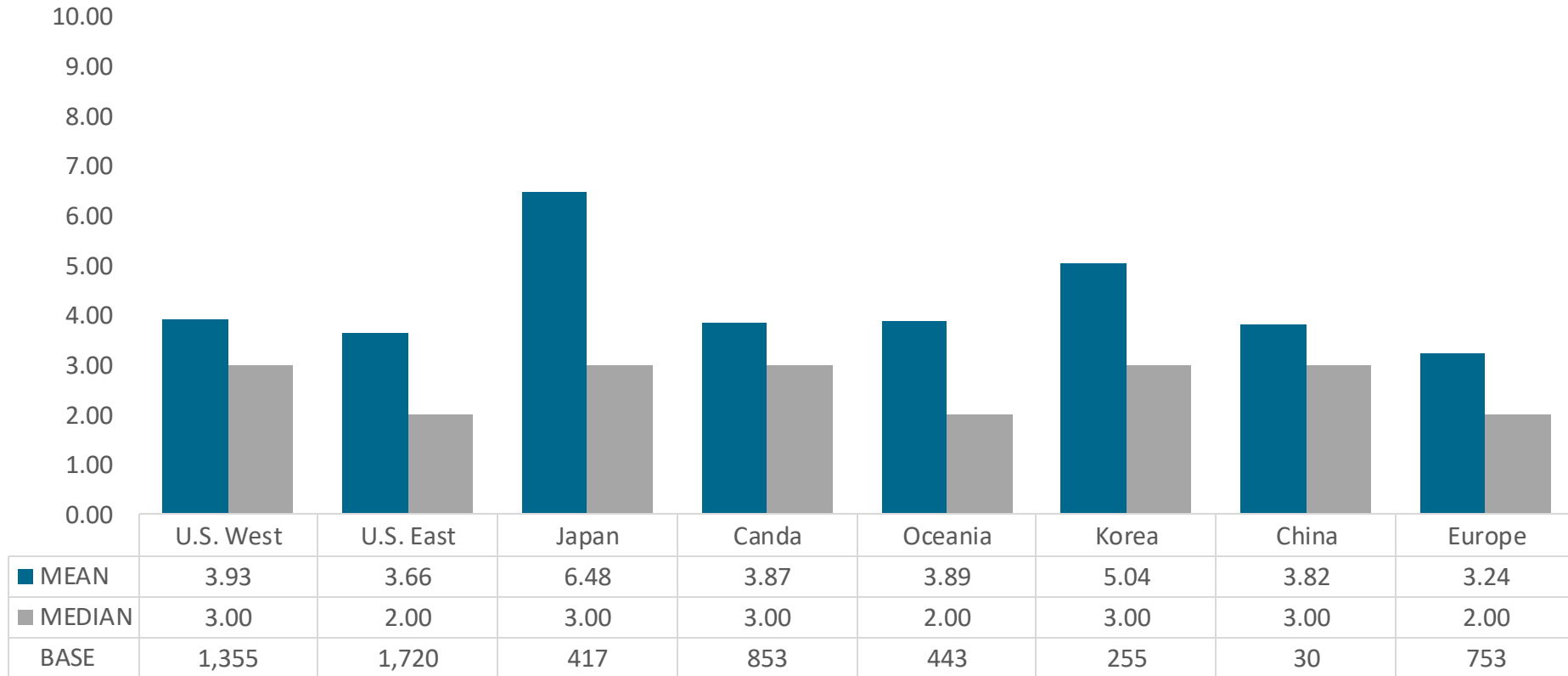
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAII



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
My spouse	58.8%	60.6%	64.6%	56.5%	59.0%	58.7%	40.0%	51.5%
Other adult members of my family	32.6%	31.4%	28.0%	27.1%	23.2%	26.1%	26.1%	21.3%
My child(ren)/ grandchild(ren) under 18	33.0%	26.1%	29.2%	33.6%	19.4%	22.8%	35.4%	23.5%
My friends/ associates	14.2%	13.8%	12.1%	16.7%	11.5%	18.0%	23.1%	12.3%
Myself only (traveled alone/ no one else)	8.7%	10.5%	9.8%	7.8%	13.8%	5.6%	15.3%	10.0%
My girlfriend/ boyfriend	7.1%	5.7%	1.8%	7.0%	3.7%	1.2%	10.8%	12.4%
Same gender partner	0.9%	1.1%	0.2%	0.8%	0.7%	0.3%	0.0%	1.5%

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	605	3.98
U.S. East	1,083	2.98
Japan	398	4.91
Canada	421	4.78
Oceania	425	4.75
Korea	238	6.35
China	28	18.52
Europe	599	4.00
All MMAs	3,797	1.59

* 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	278	5.88
U.S. East	370	5.09
Japan	6	40.01
Canada	147	8.08
Oceania	29	18.20
Korea	8	34.65
China	3	56.58
Europe	177	7.37
All MMAs	1,018	3.07

* 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	350	5.24
U.S. East	474	4.50
Japan	4	49.00
Canada	296	5.70
Oceania	32	17.32
Korea	15	25.30
China	3	56.58
Europe	243	6.29
All MMAs	1,417	2.60

* 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	240	6.33
U.S. East	374	5.07
Japan	37	16.11
Canada	182	7.26
Oceania	31	17.60
Korea	49	14.00
China	11	29.55
Europe	218	6.64
All MMAs	1,142	2.90

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

