

VISITOR SATISFACTION STUDY QUARTER 4, 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 4, 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	1,408	2.61	12.05
U.S. East	1,519	2.51	12.84
Japan	325	5.44	19.03
Canada	887	3.29	20.93
Oceania	368	5.11	15.63
Korea	241	6.31	31.02
China	47	14.29	4.49
Europe	566	4.12	14.84
All visitor markets	5,361	1.34	14.32

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 4, 2024. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

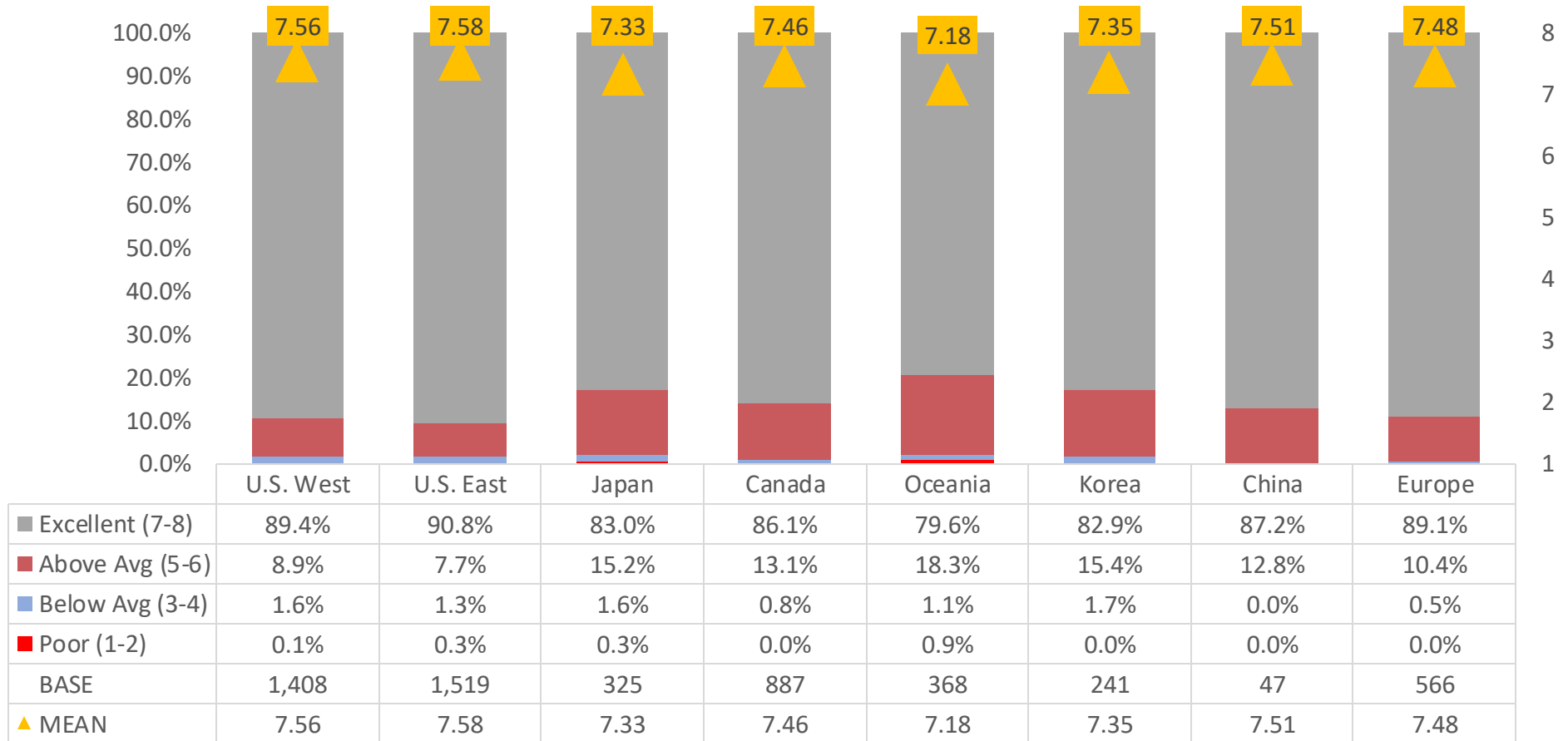
Data for 2024 are preliminary. Data for prior years reflect final visitor statistics from DBEDT Annual Visitor Research reports.

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



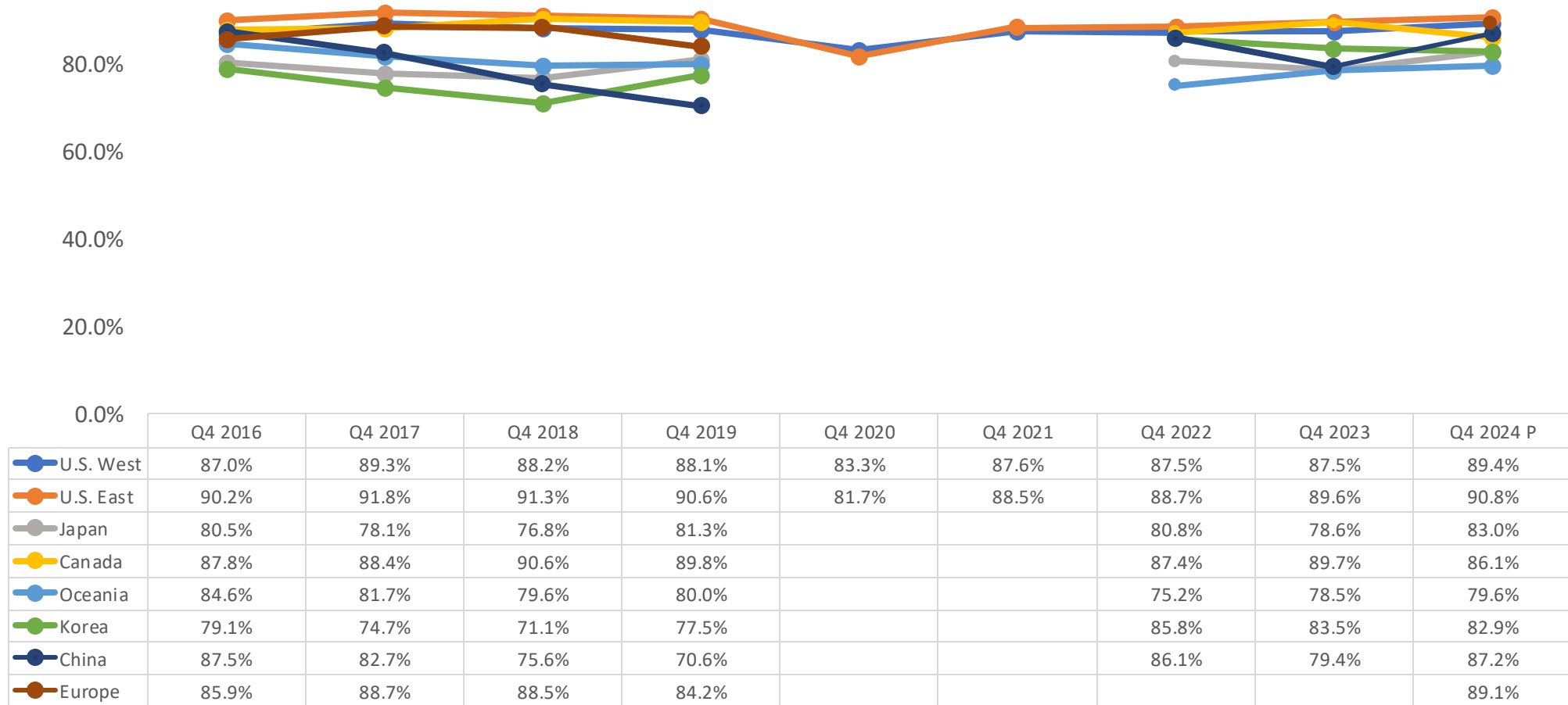
SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. East** and **Japan** gave higher satisfaction scores than male respondents from these visitor markets.
- **Age:** Satisfaction was lowest among senior visitors (65 years and older) from **Japan** compared to those younger from this visitor 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 (\$100K-\$150K).
- **Education:** College graduates from **U.S. West** and **Japan** provided higher satisfaction scores compared to those without a college degree from these visitor markets.
- **Trips to Hawai‘i:** First-time visitors from **Japan** gave higher satisfaction scores than repeat visitors from this market.

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%



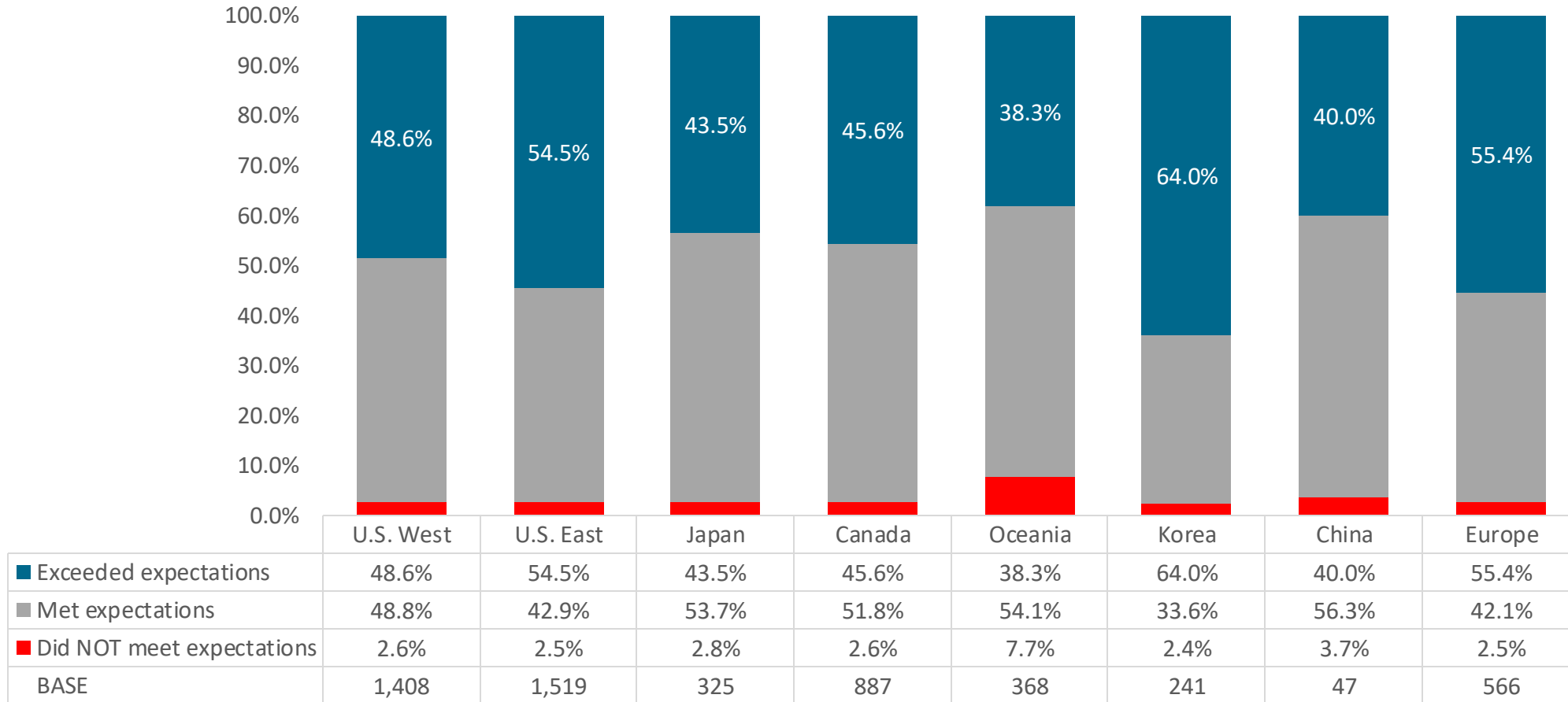
P= Preliminary Data

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. 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

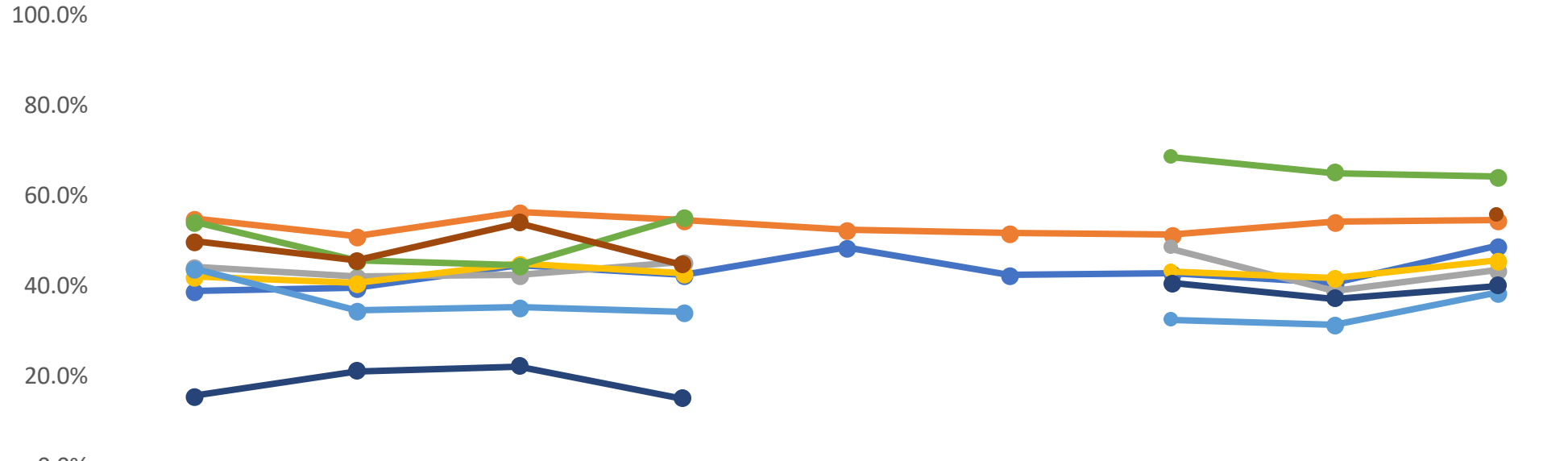


SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- **Trips to Hawai'i:** First-time visitors from the following visitor markets were more likely to feel their trip exceeded their expectations than repeat visitors: **U.S. West, U.S. East, Oceania, Canada and Japan.**
- **Age:** Younger respondents from **U.S. West** (18 – 49 years old), **U.S. East** (18 – 34 years old), **Canada** (18-34 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, Japan** and **U.S. East** gave higher mean satisfaction scores compared to male visitors from these markets.
- **Travel party size:** Visitors from **U.S. East** and **Japan** who traveled to the state in parties of two were more likely to feel their trip exceeded their expectations.
- **Education:** College graduates from **U.S. West** were more likely to feel their trip exceeded their expectation compared to visitors from this market without a college degree.
- **Household income:** Less affluent (<\$100K) visitors from **U.S. East** were more likely to feel their trip exceeded expectations compared to more affluent visitors from this visitor market.

SATISFACTION - HAWAI‘I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	38.7%	39.5%	44.3%	42.2%	48.4%	42.4%	42.6%	40.6%	48.6%
U.S. East	54.9%	50.9%	56.3%	54.5%	52.5%	51.5%	51.2%	54.0%	54.5%
Japan	44.2%	42.1%	42.2%	45.3%			48.2%	38.7%	43.5%
Canada	41.9%	40.7%	45.0%	42.6%			43.0%	41.5%	45.6%
Oceania	43.7%	34.4%	35.0%	34.1%			32.3%	31.2%	38.3%
Korea	54.1%	45.7%	44.4%	55.2%			68.4%	64.9%	64.0%
China	15.5%	20.9%	22.0%	14.9%			40.4%	37.1%	40.0%
Europe	49.8%	45.5%	53.9%	44.6%					55.4%

P= Preliminary Data

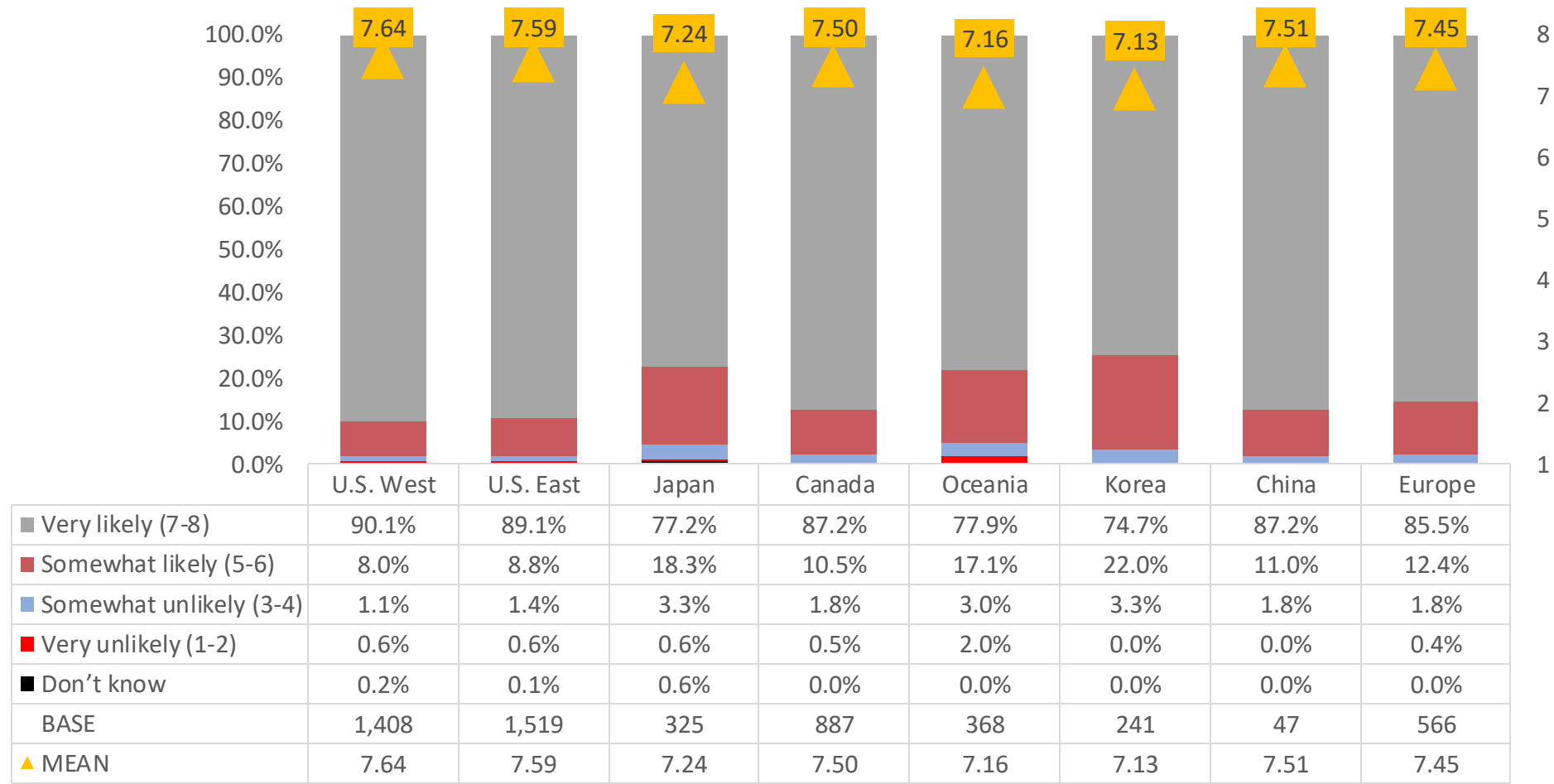
Q. Would you say this trip to Hawai'i ___?

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

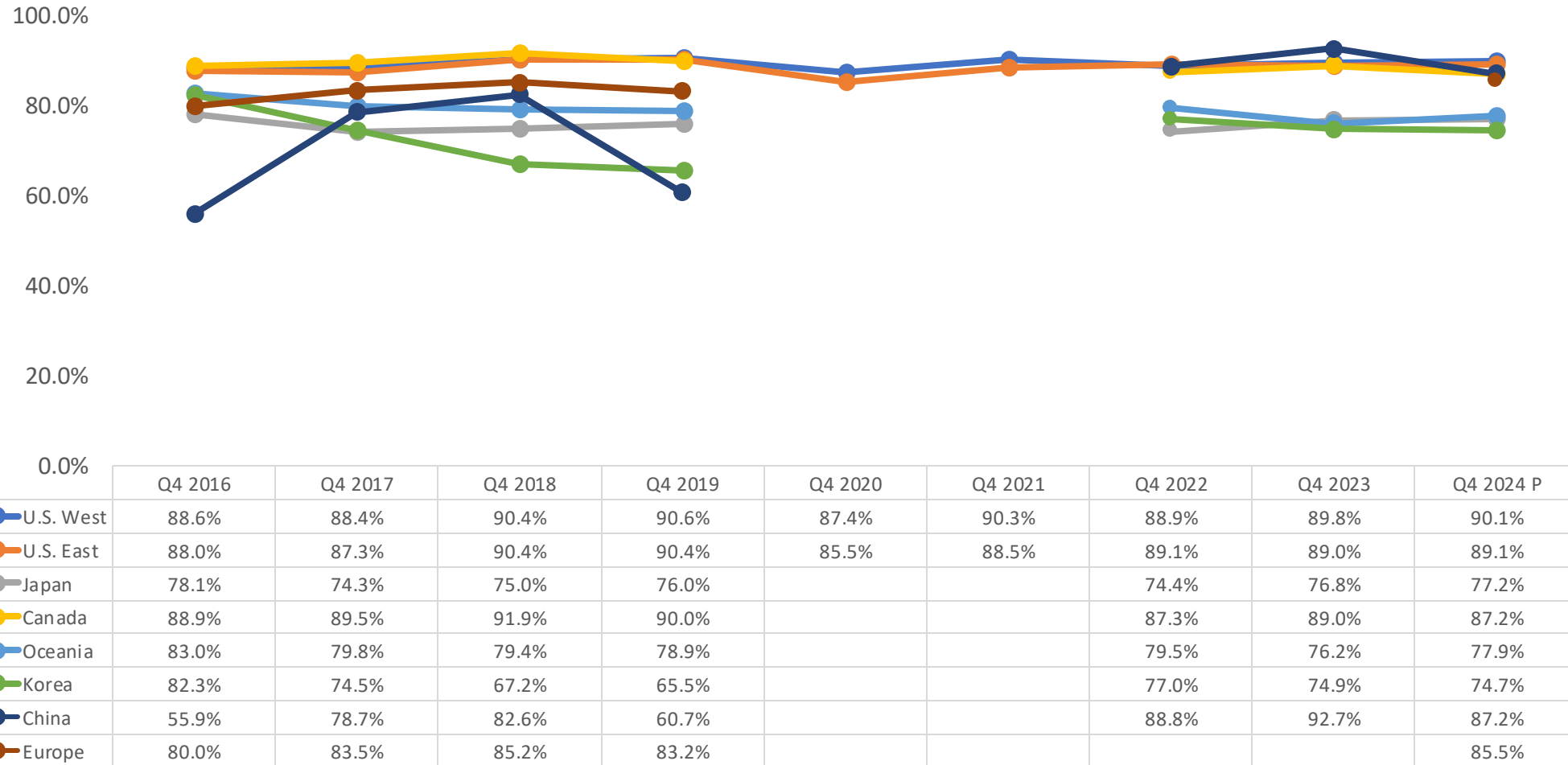


BRAND/ DESTINATION - ADVOCACY

- **Gender:** Female respondents from **U.S. West** were more likely to recommend the state to others than male respondents from this visitor market.
- **Age:** Senior visitors from **Japan** (65 years and older) were the least likely to recommend the state compared to younger travelers from this market.
- **Household size:** Visitors from **U.S. West** who traveled to the state by themselves were the least likely to recommend the state compared to those who traveled with at least one other individual.

BRAND/ DESTINATION - ADVOCACY

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



P= Preliminary Data

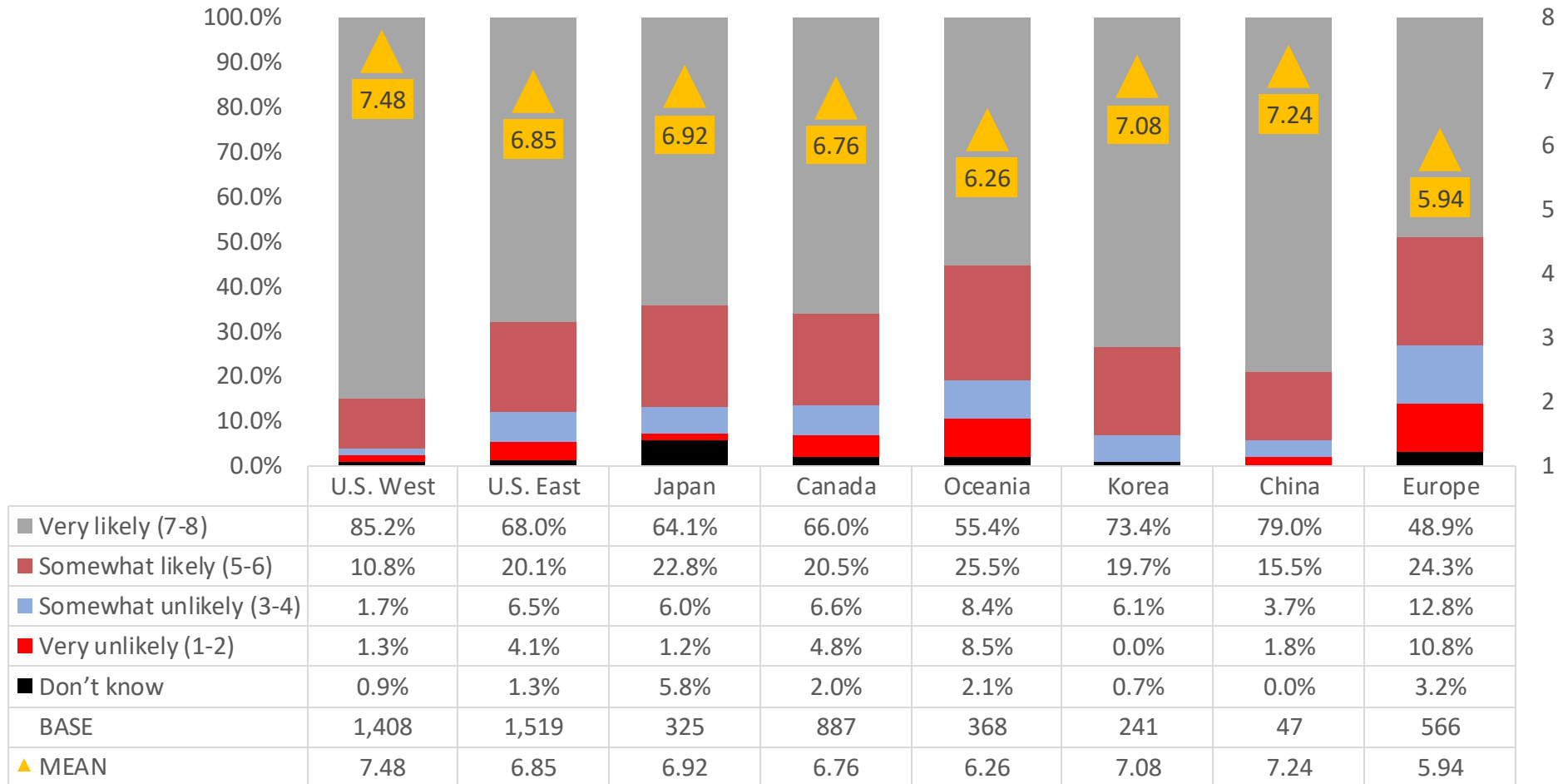
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. 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

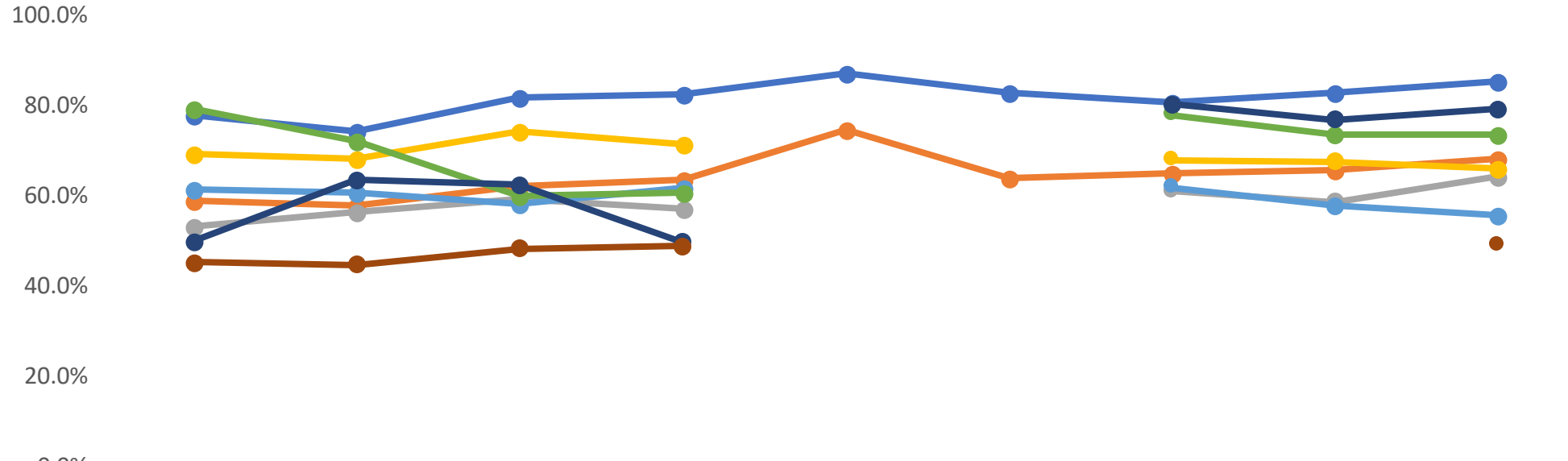


LIKELIHOOD OF RETURN VISIT

- **Gender:** Male respondents from **U.S. West** expressed a greater likelihood to return to Hawai'i than female respondents from this visitor market.
- **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, Oceania, and Japan.**
- **Islands visited:** Visitors from **U.S. East** and **Canada** 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. Conversely, travelers from **Japan** who visited multiple islands were more likely to return.
- **Age:** Travelers from **Japan** between the ages 18-34 years old expressed the least likelihood of returning than other age groups from this visitor market. Older visitors from **U.S. East** (65 years and older) were also less likely to return to the state than younger visitors from this market.
- **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 than less affluent travelers from this market.
- **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)



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	77.9%	74.0%	81.7%	82.3%	87.0%	82.6%	80.6%	82.7%	85.2%
U.S. East	58.7%	57.7%	61.9%	63.5%	74.4%	63.7%	64.8%	65.6%	68.0%
Japan	52.9%	56.4%	59.3%	57.1%			60.8%	58.6%	64.1%
Canada	69.0%	68.1%	74.1%	71.2%			67.9%	67.4%	66.0%
Oceania	61.3%	60.7%	58.0%	61.6%			61.7%	57.6%	55.4%
Korea	79.1%	72.1%	59.7%	60.7%			77.8%	73.4%	73.4%
China	50.0%	63.4%	62.2%	49.6%			80.1%	76.7%	79.0%
Europe	45.3%	44.5%	48.2%	48.7%					48.9%

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. 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.



UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q4 2023	Q4 2024 P
40.7% Too expensive	38.1% Too expensive
34.2% Want to go someplace new	31.0% Want to go someplace new
32.7% Poor value	21.8% Poor value
18.6% Too crowded/ congested/ traffic	20.0% Too crowded/ congested/ traffic
15.4% Unfriendly people/ felt unwelcome	16.3% Poor health/ age
13.9% Too commercialized/ overdeveloped	12.7% Too commercialized/ overdeveloped
13.8% No reason to return/ nothing new	12.7% Other financial obligations
12.8% Other financial obligations	10.9% No reason to return/ nothing new
12.6% Poor health/ age	10.9% Fiver years is too soon
11.2% Flight too long	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q4 2023	Q4 2024 P
46.0% Too expensive	46.6% Too expensive
38.0% Flight too long	44.0% Want to go someplace new
37.0% Want to go someplace new	43.2% Flight too long
17.3% Other financial obligations	18.1% Poor value
15.4% Poor value	17.5% Too crowded/ congested/ traffic
14.8% Too crowded/ congested/ traffic	14.2% Five years is too soon
11.8% Too commercialized/ overdeveloped	12.4% No reason to return/ nothing new
11.2% Five years is too soon	11.3% Other financial obligations
	10.7% Too commercialized/ overdeveloped

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q4 2023*	Q4 2024 P**
65.9% Too expensive 22.6% Other financial obligations 18.1% Want to go someplace new 13.5% Five years is too soon 11.3% Poor health/ age	73.0% Too expensive 39.2% Want to go someplace new 30.2% Other financial obligations 29.0% Five years is too soon

*Caution small base (n=44 respondents) in Q4 2023.

**Caution small base (n=41 respondents) in Q4 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q4 2023	Q4 2024 P
58.5% Too expensive	61.0% Too expensive
38.0% Want to go someplace new	44.1% Want to go someplace new
30.8% Flight is too long	34.3% Flight too long
23.6% Poor value	26.7% Poor value
13.0% Other financial obligations	16.7% Five years is too soon
	11.5% No reason to return/ nothing new
	10.2% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q4 2023	Q4 2024 P
60.6% Too expensive	45.0% Want to go someplace new
40.9% Want to go someplace new	43.4% Too expensive
39.8% Poor value	28.2% Poor value
28.3% Too commercialized/ overdeveloped	24.0% Flight too long
16.8% Too crowded/ congested/ traffic	16.4% Too commercialized/ overdeveloped
12.6% No reason to return/ nothing new	13.5% No reason to return/ nothing new
	12.1% Too crowded/ congested/ traffic
	11.7% Five years is too soon

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q4 2023*	Q4 2024 P**
55.6% Too expensive	94.6% Too expensive
35.2% Poor value	48.6% Poor value
27.0% Flight too long	35.1% Flight too long
23.0% No reason to return/ nothing new	29.7% Five years is too soon
20.4% Five years is too soon	27.1% Other financial obligations
20.4% Other financial obligations	27.1% Want to go someplace new
18.9% Want to go someplace new	26.9% No reason to return/ nothing new
	10.9% Too crowded/ congested/ traffic

*Caution small base (n=22 respondents) in Q4 2023.

**Caution small base (n=17 respondents) in Q4 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Q4 2023*	Q4 2024 P**
33.3% Too expensive 33.3% Flight too long 33.3% No reason to return/ nothing new 33.3% Unfriendly people/ felt unwelcome 33.3% Crime/ safety concerns	66.7% Too expensive 33.3% No reason to return/ nothing new 33.3% Unfriendly people/ felt unwelcome 33.3% Poor value 33.3% Flight too long

*Caution small base (n=3 respondents) in Q4 2023.

**Caution small base (n=3 respondents) in Q4 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

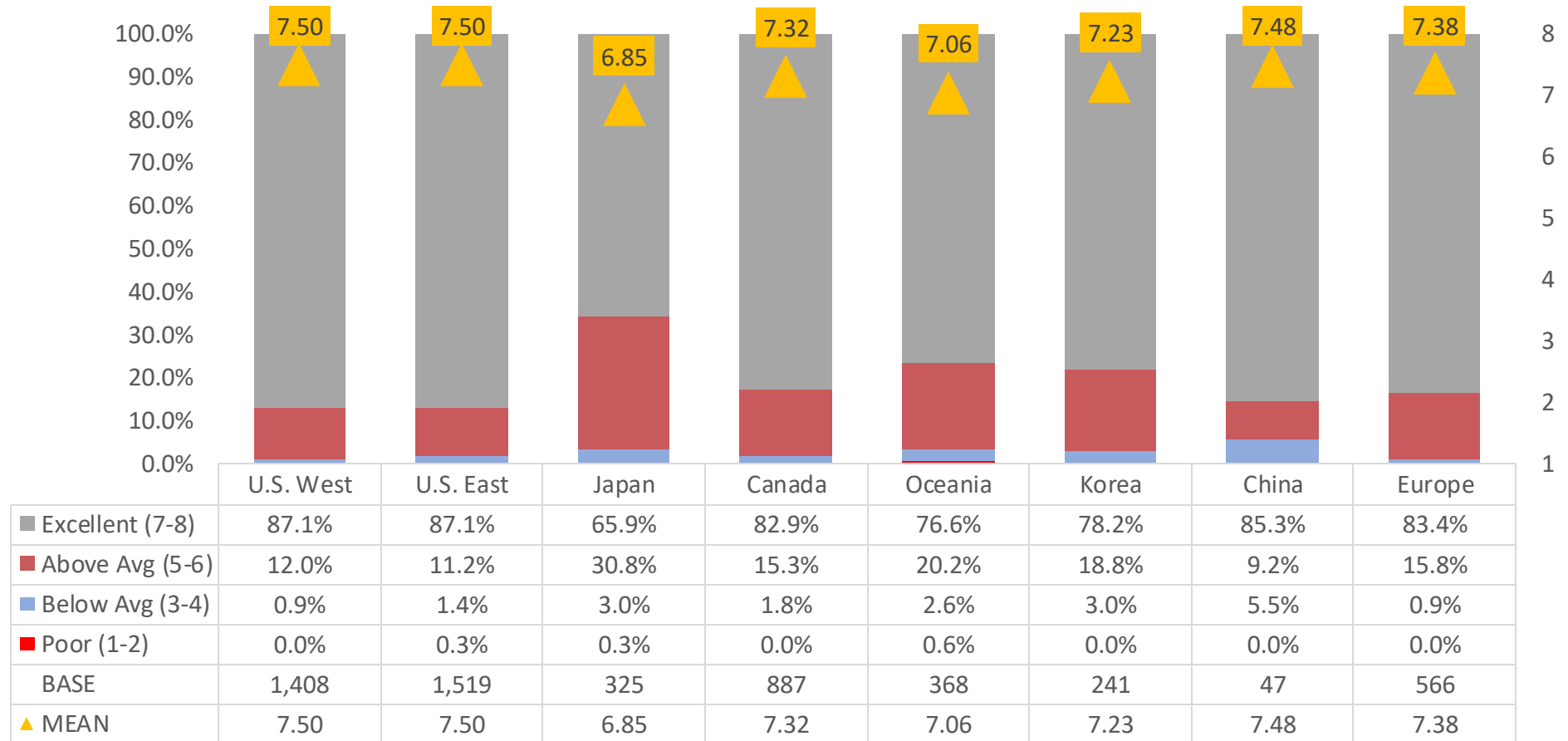
Q4 2019*	Q4 2024 P**
57.3% Flight too long	55.7% Too expensive
43.7% Too expensive	55.2% Flight too long
42.0% Want to go someplace new	36.4% Want to go someplace new
23.9% Five years is too soon	24.0% Five years is too soon
13.5% Too commercialized/ overdeveloped	15.6% Poor value
12.5% Other financial obligations	13.7% Too commercialized/ overdeveloped
12.5% Poor value	

*No data collected from 2020 thru 2023.

P= Preliminary Data

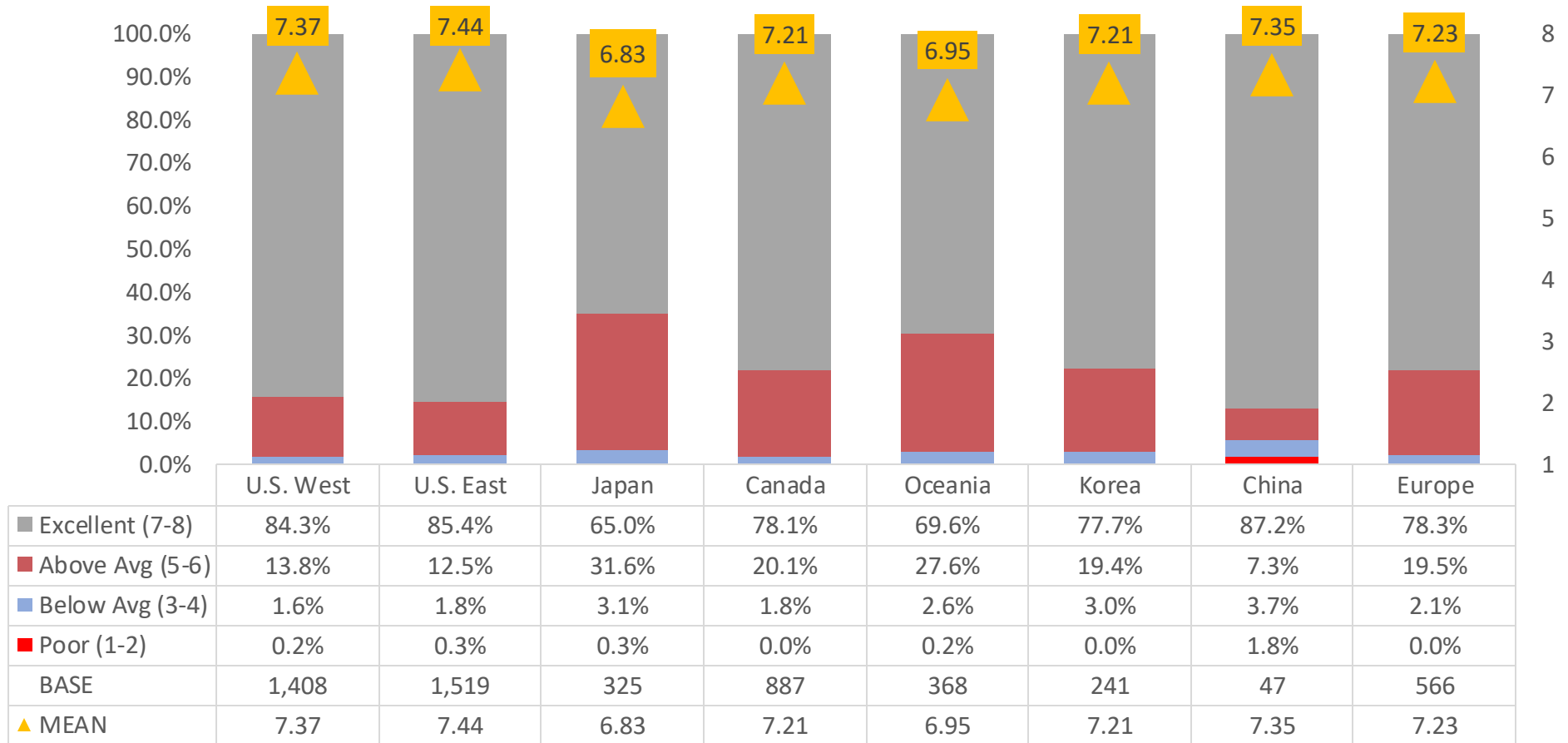
OFFERING A VARIETY OF EXPERIENCES

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



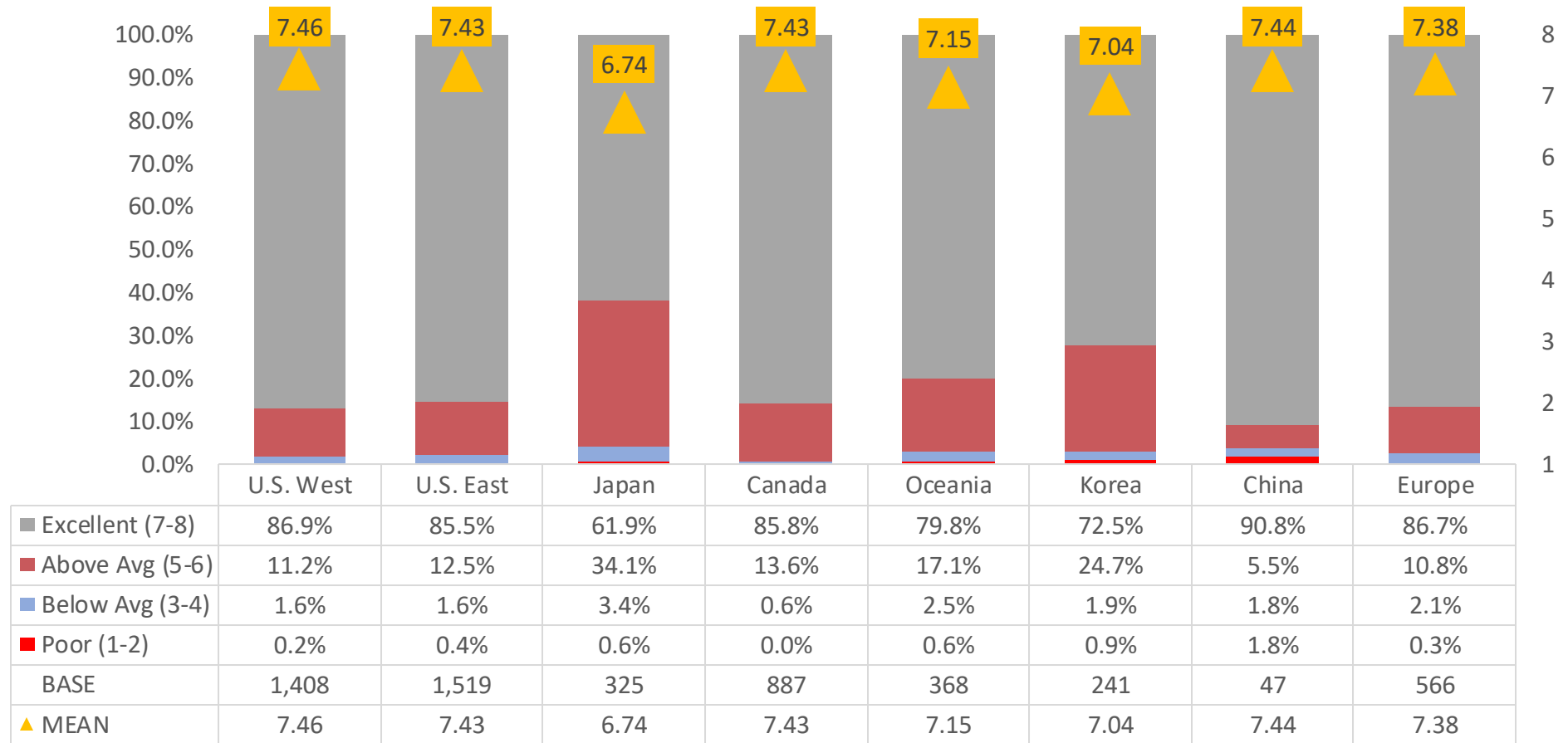
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



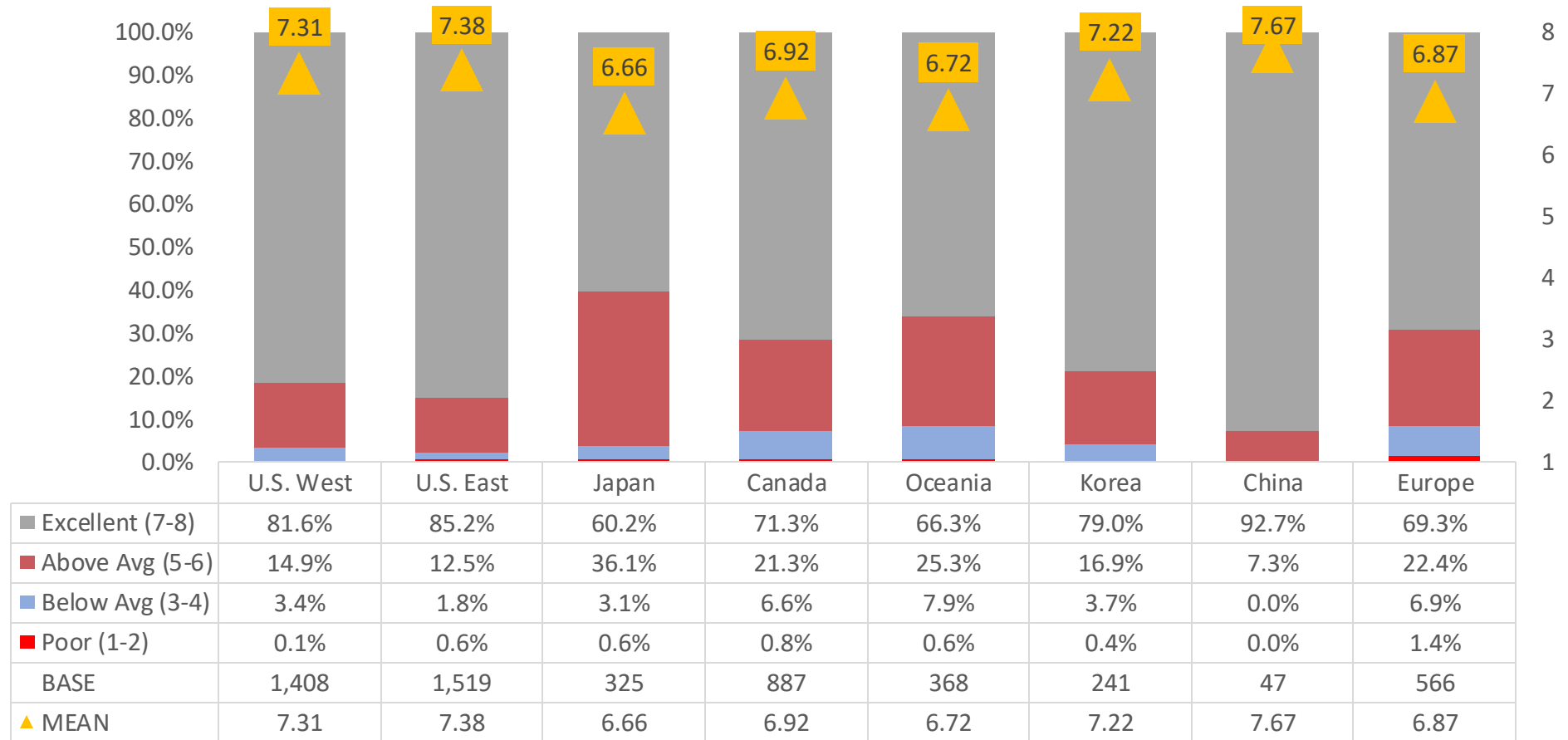
SAFE AND SECURE DESTINATION

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



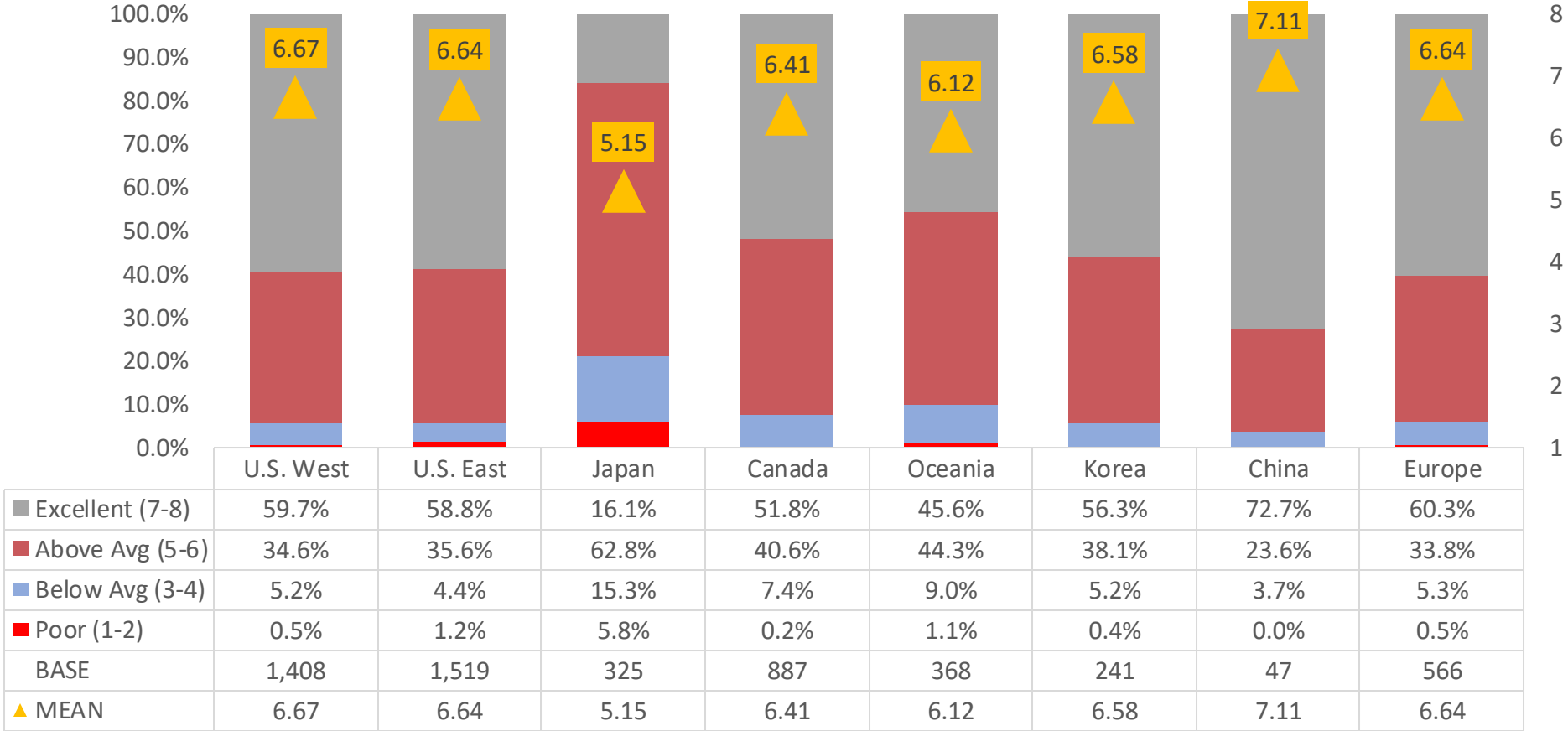
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	96.8%	97.9%	97.1%	98.3%	92.8%	99.1%	100.0%	98.1%
On own (self-guided)/ driving around island	84.5%	79.8%	70.9%	86.1%	46.6%	79.7%	70.6%	75.1%
Helicopter ride/ airplane tour	2.7%	5.7%	0.3%	4.1%	3.4%	4.9%	4.1%	10.6%
Boat tour/ submarine ride/ whale watching	21.0%	27.7%	9.6%	23.2%	18.8%	32.5%	31.3%	22.2%
Visit towns/ communities	50.5%	52.0%	35.4%	58.6%	27.1%	39.9%	22.2%	43.4%
Private limousine/ van tour/ tour bus	6.1%	14.5%	15.3%	10.4%	29.7%	15.3%	12.2%	18.8%
Scenic views/ natural landmarks	57.0%	66.2%	24.3%	64.6%	50.9%	60.3%	67.6%	63.2%
Movie/ TV/ film location tours	4.4%	5.6%	7.9%	7.1%	10.2%	28.8%	12.2%	9.0%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	95.6%	95.4%	94.7%	97.9%	92.7%	97.4%	98.0%	95.2%
Beach/ sunbathing	84.5%	79.8%	71.2%	89.6%	73.8%	84.0%	82.7%	81.7%
Bodyboarding	8.1%	4.6%	0.3%	9.4%	2.5%	3.3%	6.1%	5.7%
Standup paddle boarding	2.8%	3.8%	2.9%	2.5%	2.2%	3.0%	0.0%	3.1%
Surfing	5.7%	4.6%	3.1%	6.7%	8.5%	11.9%	0.0%	11.3%
Canoe paddling	1.1%	1.5%	0.6%	1.4%	0.9%	3.0%	0.0%	3.1%
Kayaking	3.7%	3.5%	0.3%	3.7%	0.6%	4.1%	4.1%	2.8%
Swimming in the ocean	61.3%	54.3%	32.5%	72.5%	58.1%	55.3%	36.3%	66.9%
Snorkeling	36.9%	31.4%	10.2%	44.7%	20.8%	57.0%	41.4%	39.4%
Freediving	1.9%	0.9%	0.0%	1.8%	0.2%	1.5%	6.0%	2.6%
Windsurfing/ Kitesurfing	0.1%	0.2%	0.3%	0.5%	0.4%	0.0%	2.0%	1.0%
Jet skiing/ Parasailing	1.5%	1.5%	4.2%	1.2%	0.4%	1.7%	4.1%	0.2%
Scuba diving	2.5%	2.1%	1.0%	3.0%	0.6%	1.1%	0.0%	3.5%
Fishing	1.7%	2.0%	0.3%	1.8%	1.0%	0.0%	6.1%	0.8%
Golf	7.0%	5.4%	5.8%	7.6%	1.7%	5.2%	2.0%	3.1%
Running/ jogging/ fitness/ walking	30.3%	30.2%	28.9%	32.6%	25.3%	22.4%	20.1%	25.5%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	95.6%	95.4%	94.7%	97.9%	92.7%	97.4%	98.0%	95.2%
Cycling	2.2%	2.5%	3.5%	4.6%	0.6%	1.5%	2.0%	6.2%
Spa	8.5%	8.4%	4.1%	5.8%	4.9%	9.3%	2.0%	4.1%
Hiking	39.0%	41.8%	23.8%	44.0%	17.9%	27.4%	49.4%	47.2%
Backpacking/ camping	1.0%	1.2%	0.3%	1.4%	0.2%	0.0%	2.0%	2.6%
Agritourism	10.9%	15.6%	6.5%	11.1%	7.4%	19.4%	17.3%	9.5%
Sports event or tournament	2.9%	3.8%	2.2%	2.6%	3.2%	1.7%	0.0%	8.4%
Parks/ botanical gardens	32.9%	39.4%	22.1%	38.8%	26.9%	23.9%	30.3%	39.6%
Waterparks	1.7%	1.2%	1.0%	1.4%	0.9%	2.4%	4.1%	1.7%
Mountain tubing/ waterfall rappel	1.6%	1.8%	0.3%	1.7%	0.6%	1.7%	2.0%	3.2%
Zip-lining	2.8%	3.8%	1.0%	1.8%	0.9%	0.8%	4.1%	1.9%
Skydiving	0.0%	0.4%	0.6%	0.6%	0.0%	2.1%	5.0%	0.4%
All-terrain vehicle (ATV)	2.6%	3.7%	1.9%	2.4%	4.2%	11.2%	4.1%	2.8%
Horseback riding	1.3%	1.4%	3.1%	1.1%	0.5%	1.1%	13.2%	1.0%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	97.5%	97.2%	98.1%	97.6%	96.7%	98.7%	100.0%	97.1%
Lunch/ sunset/ dinner/ evening cruise	21.5%	26.5%	14.8%	22.0%	20.6%	35.5%	48.4%	27.5%
Live music/ stage show	25.6%	30.3%	19.0%	27.6%	18.6%	14.9%	16.2%	28.9%
Nightclub/ dancing/ bar/ karaoke	6.9%	6.2%	3.2%	6.2%	5.4%	2.8%	3.0%	6.4%
Fine dining	46.8%	47.1%	34.3%	40.6%	31.3%	55.5%	41.4%	28.8%
Family restaurant	61.7%	53.5%	26.9%	58.6%	65.9%	40.1%	17.1%	45.3%
Fast food	29.9%	31.5%	53.1%	37.1%	50.8%	59.3%	38.5%	42.2%
Food truck	41.3%	41.1%	28.2%	43.3%	31.9%	63.5%	35.3%	47.3%
Café/ coffee house	52.9%	49.7%	59.9%	55.8%	60.6%	68.7%	47.5%	55.1%
Ethnic dining	22.9%	28.9%	7.2%	21.4%	11.5%	25.2%	19.3%	12.9%
Farm-to-table cuisine	16.8%	18.2%	16.7%	14.8%	3.9%	2.1%	5.0%	7.3%
Prepared own meal	42.6%	33.5%	26.6%	61.1%	18.5%	13.4%	16.1%	42.2%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	94.9%	94.3%	98.1%	97.5%	95.8%	95.5%	95.9%	94.7%
Malls/ department stores	46.5%	44.2%	86.6%	55.2%	74.1%	81.4%	57.6%	56.5%
Designer boutiques	18.2%	18.3%	17.8%	17.9%	15.6%	3.9%	7.1%	13.4%
Hotel/ resort stores	34.1%	35.1%	32.8%	27.9%	34.5%	36.2%	30.2%	22.9%
Swap meet/ flea market	15.2%	12.5%	3.4%	18.1%	6.8%	2.6%	6.1%	6.5%
Discount/ outlet stores	11.8%	11.1%	32.6%	16.1%	31.0%	54.9%	7.1%	12.7%
Supermarkets	55.9%	48.6%	61.1%	64.6%	44.5%	50.2%	41.5%	65.9%
Farmer's market	36.0%	30.4%	26.2%	45.9%	18.7%	9.7%	22.2%	36.4%
Convenience stores	48.9%	45.7%	57.9%	49.9%	66.4%	64.9%	40.4%	37.9%
Duty free stores	3.9%	5.1%	24.5%	6.3%	11.3%	36.4%	19.2%	6.4%
Hawai'i-made products	46.9%	48.5%	18.8%	42.7%	32.9%	31.6%	36.3%	47.1%
Local shops and artisans	54.9%	53.7%	13.2%	55.9%	39.2%	19.0%	24.2%	50.8%
Local fashion designers	6.6%	6.9%	3.4%	9.3%	8.3%	0.9%	2.0%	11.7%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	66.2%	74.9%	59.9%	70.2%	72.1%	63.1%	73.7%	73.3%
Historic military sites and museums	18.3%	29.4%	16.5%	16.9%	45.4%	20.9%	31.4%	32.9%
Historic Hawaiian sites and museums	29.8%	35.4%	15.9%	35.2%	25.9%	11.2%	20.1%	38.1%
Other historical sites, museums, and homes	12.8%	14.4%	8.9%	13.6%	9.6%	17.6%	18.1%	15.5%
Art museums	2.8%	2.1%	4.1%	2.3%	2.3%	2.4%	2.0%	3.8%
Art galleries and exhibitions	7.6%	7.0%	4.8%	9.2%	4.9%	2.8%	6.0%	8.7%
Lū'au/ Polynesian show/ hula show	22.0%	34.6%	17.1%	25.3%	23.7%	20.7%	17.1%	26.2%
Lesson- ex. ukulele, hula, canoe, lei making	4.9%	5.7%	3.8%	5.6%	4.0%	4.1%	12.1%	4.9%
Play/ concert/ theatre	2.9%	2.1%	3.1%	4.0%	3.0%	3.6%	2.0%	3.8%
Art/ craft fair	12.3%	10.3%	2.6%	13.5%	5.3%	4.5%	17.1%	8.7%
Festival /event	5.7%	4.8%	6.8%	7.0%	5.8%	4.5%	3.0%	6.5%

ACTIVITIES - TRANSPORTATION

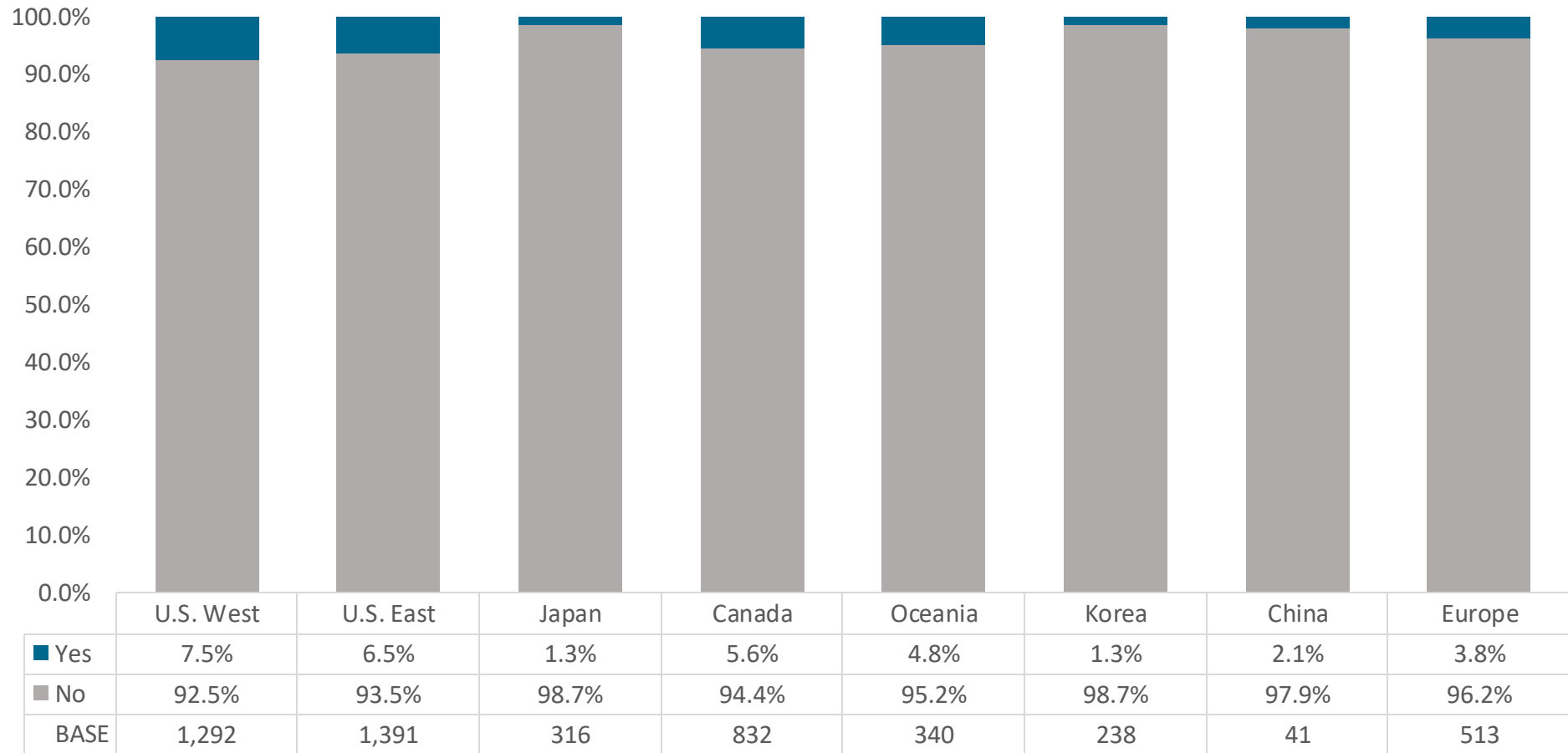
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	92.2%	91.4%	96.8%	95.8%	95.7%	96.3%	91.9%	93.2%
Airport shuttle	10.8%	11.8%	21.2%	13.9%	31.5%	9.9%	13.1%	14.9%
Trolley	1.6%	3.1%	54.1%	3.8%	14.3%	22.8%	2.0%	3.7%
Public bus	4.0%	4.0%	26.4%	9.0%	23.2%	12.5%	19.2%	18.1%
Tour bus/ tour van	6.7%	14.0%	19.4%	12.3%	29.8%	29.1%	12.1%	18.0%
Taxi/ limo	5.5%	8.6%	27.3%	11.7%	36.1%	25.8%	18.2%	16.8%
Rental car	72.5%	66.7%	25.4%	73.3%	24.9%	58.0%	45.4%	60.7%
Ride share	18.8%	22.9%	23.8%	22.2%	41.3%	25.8%	36.4%	22.3%
Car share (i.e.,Hui, Turo)	4.3%	3.8%	1.3%	3.3%	3.2%	0.9%	3.0%	0.9%
Bicycle rental	2.2%	1.6%	4.1%	2.2%	1.1%	0.9%	6.0%	2.6%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	30.5%	30.5%	16.7%	20.6%	12.7%	19.0%	30.2%	19.2%
Visit friends/ family	28.7%	28.5%	14.7%	18.7%	11.3%	18.1%	30.2%	16.1%
Volunteering/ Giving back to the local community	2.1%	3.1%	2.6%	2.6%	1.6%	0.9%	2.0%	3.7%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

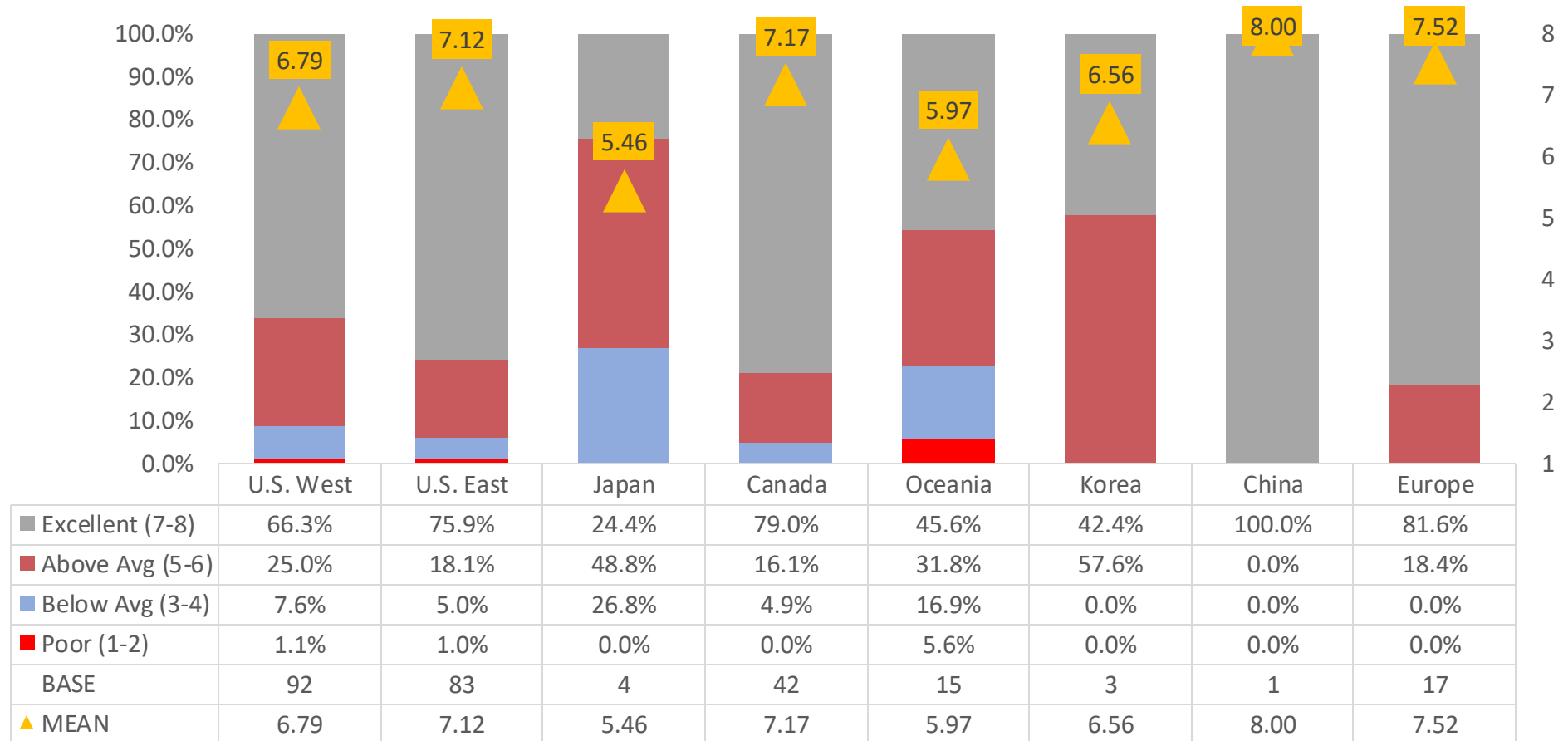


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Mobility aid	73.3%	68.9%	24.4%	63.6%	49.5%	71.2%	0.0%	58.2%
Personal assistance	24.7%	21.6%	24.4%	20.3%	26.4%	0.0%	0.0%	5.5%
NA- No one needed assistance	5.1%	9.9%	24.4%	11.5%	21.2%	0.0%	100.0%	11.0%
Other	8.2%	3.4%	0.0%	9.2%	0.0%	0.0%	0.0%	9.9%
Orientation and Mobility Assistance	3.1%	2.2%	26.8%	6.5%	8.0%	0.0%	0.0%	15.4%
Lift equipped van	2.1%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ambulance/ Hospital/ Medical visit	0.0%	2.4%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%
Disabled parking/ placard	0.0%	0.0%	24.4%	2.3%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	1.2%	0.0%	2.3%	0.0%	28.8%	0.0%	0.0%
Service/ assistance animal	0.0%	1.0%	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%	0.0%	0.0%	0.0%
BASE	97	90	4	45	16	3	1	19

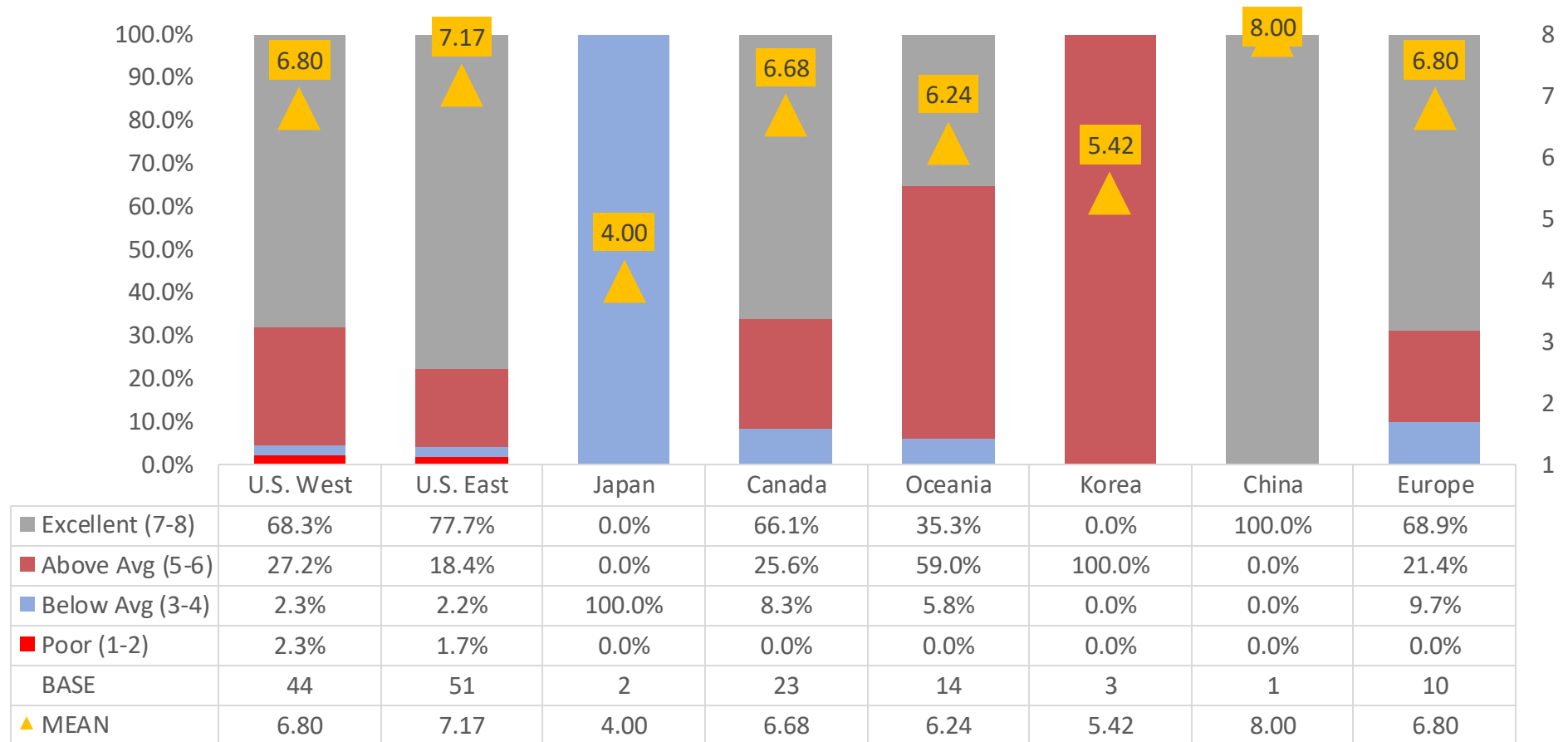
OVERALL ACCESSIBILITY - AIRPORTS

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



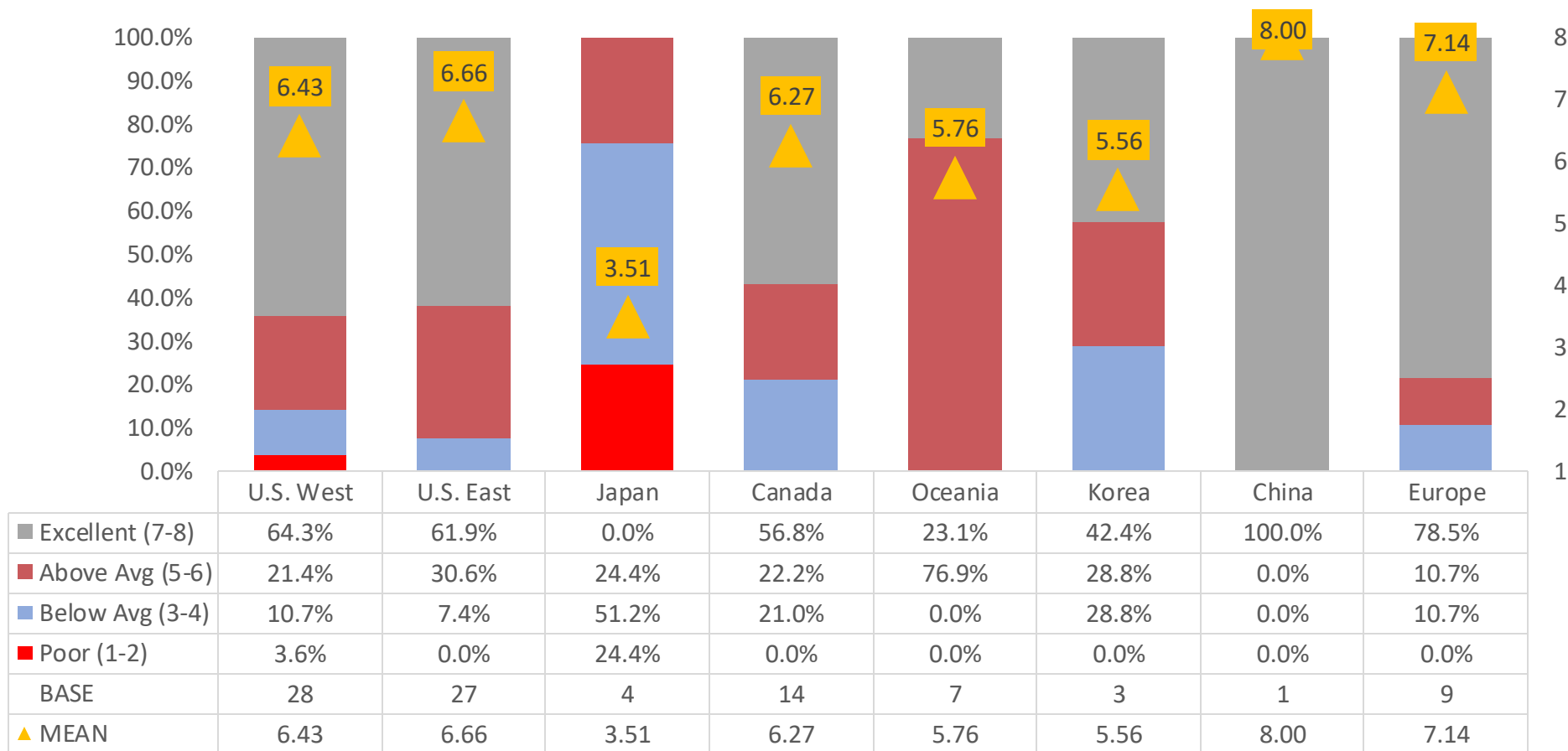
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



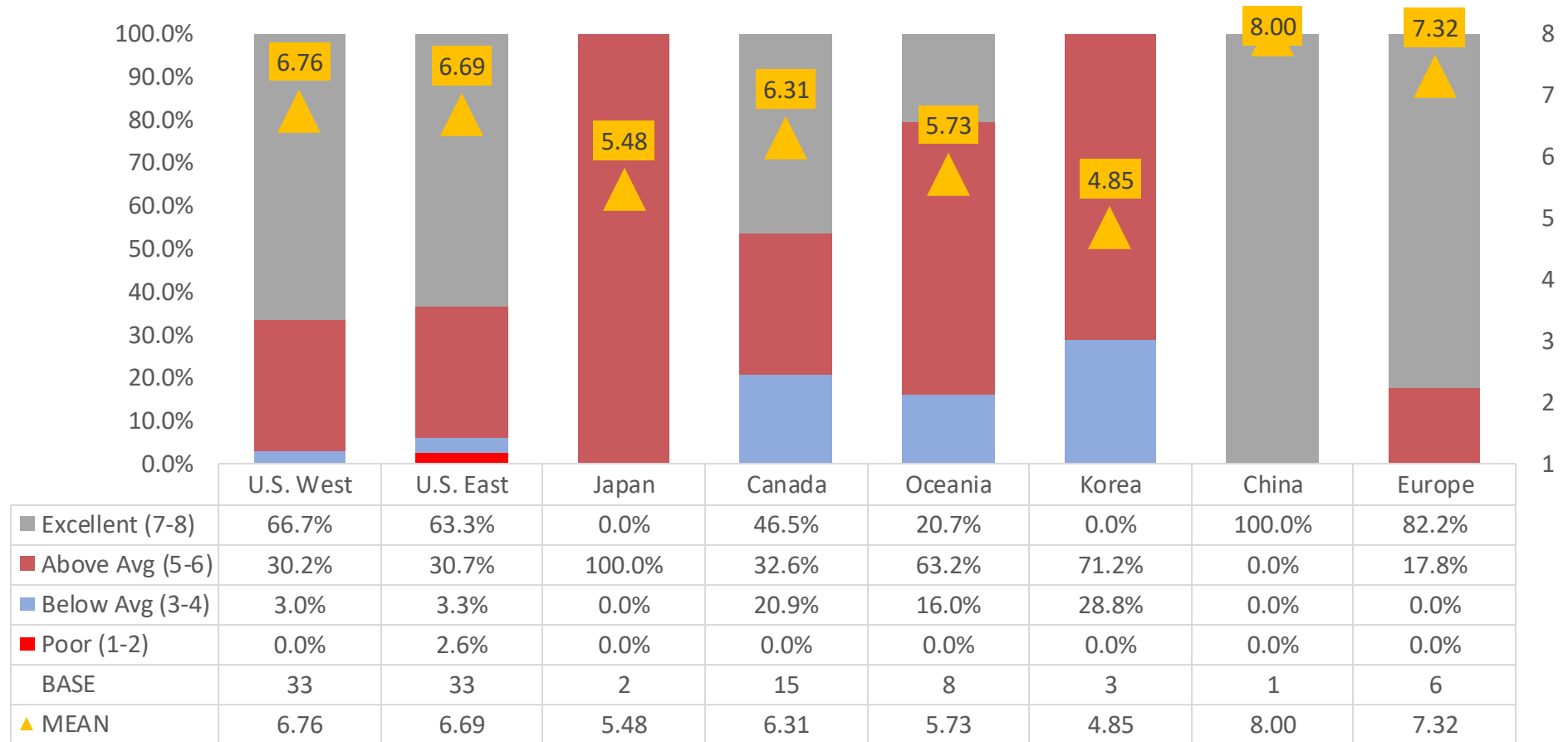
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



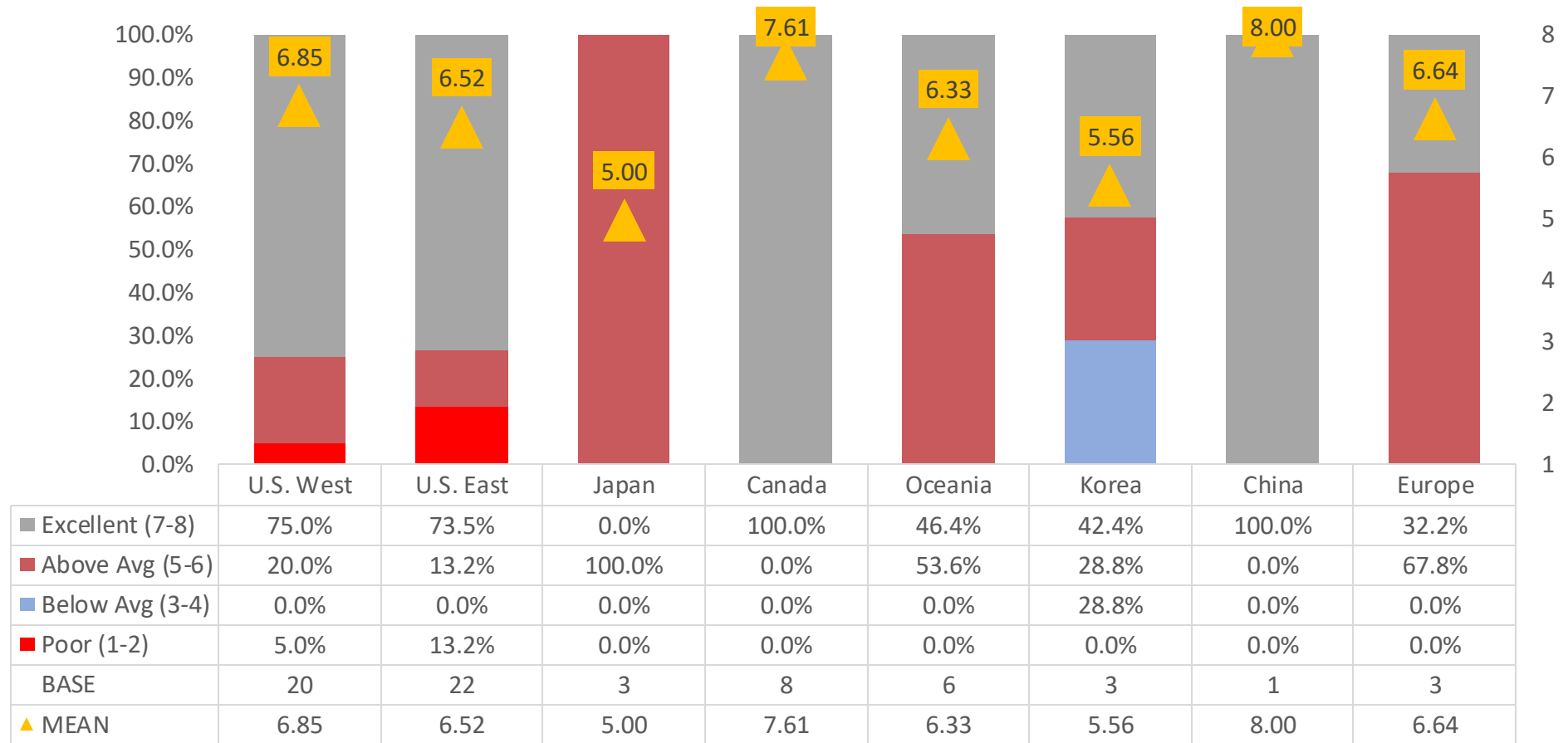
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



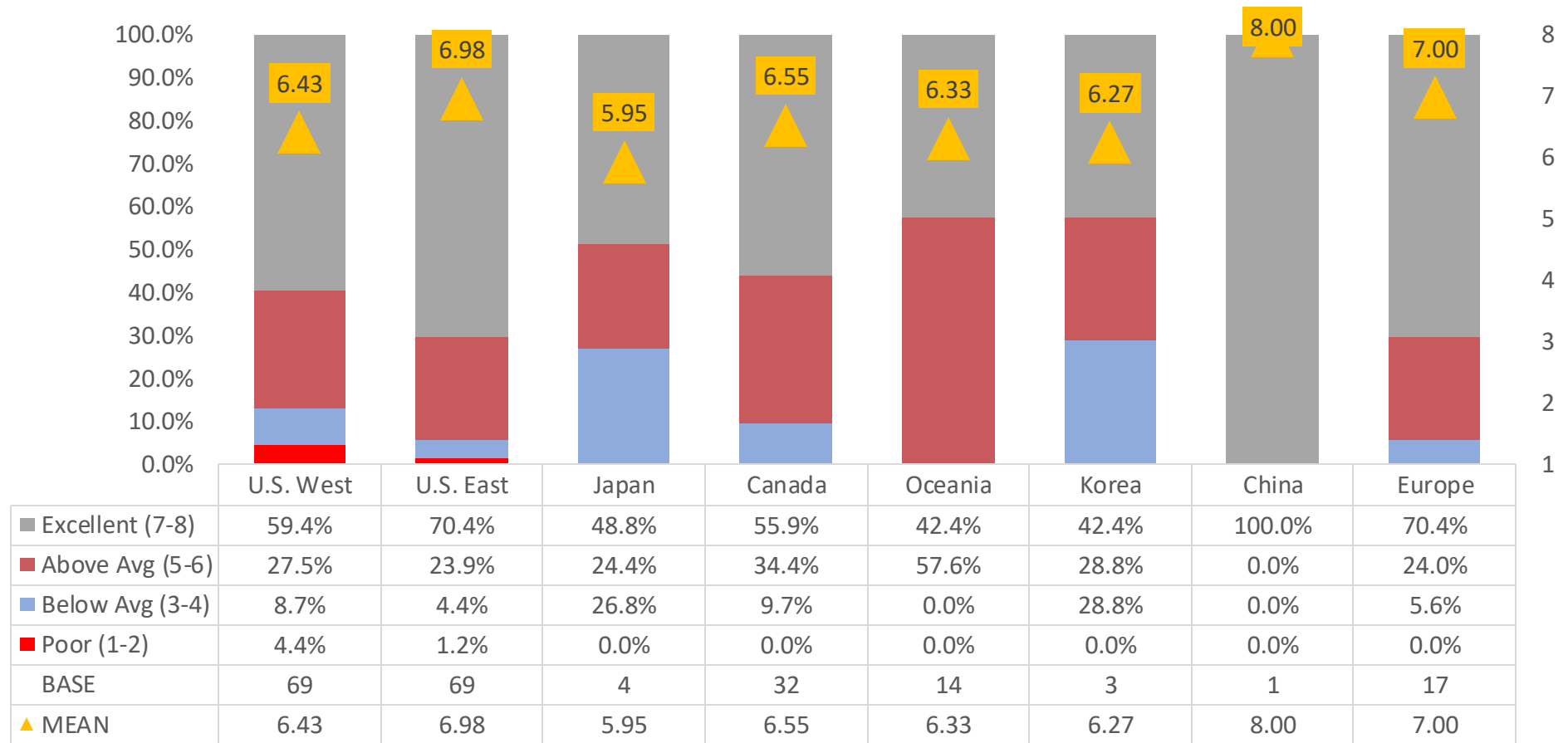
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



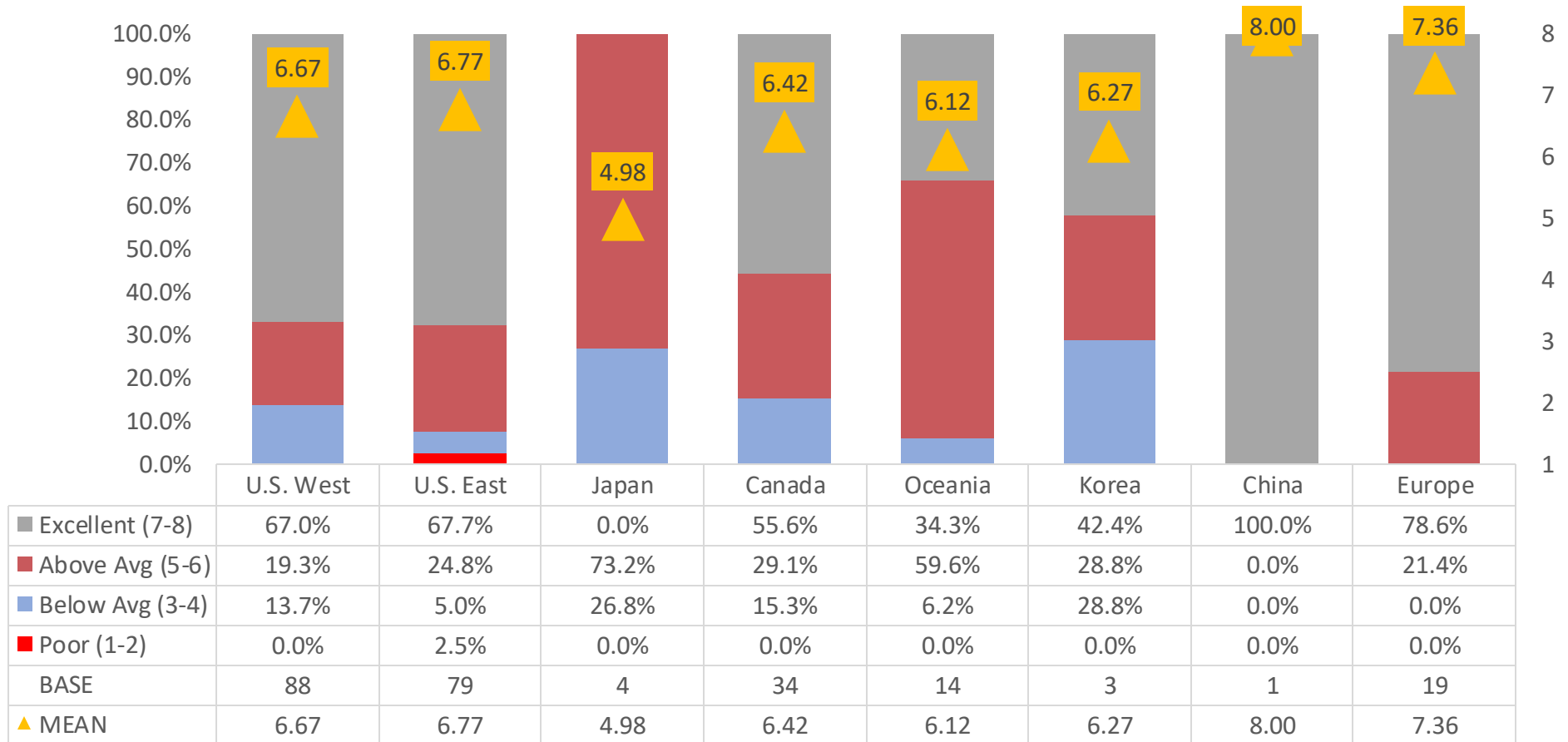
OVERALL ACCESSIBILITY - HOTELS

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



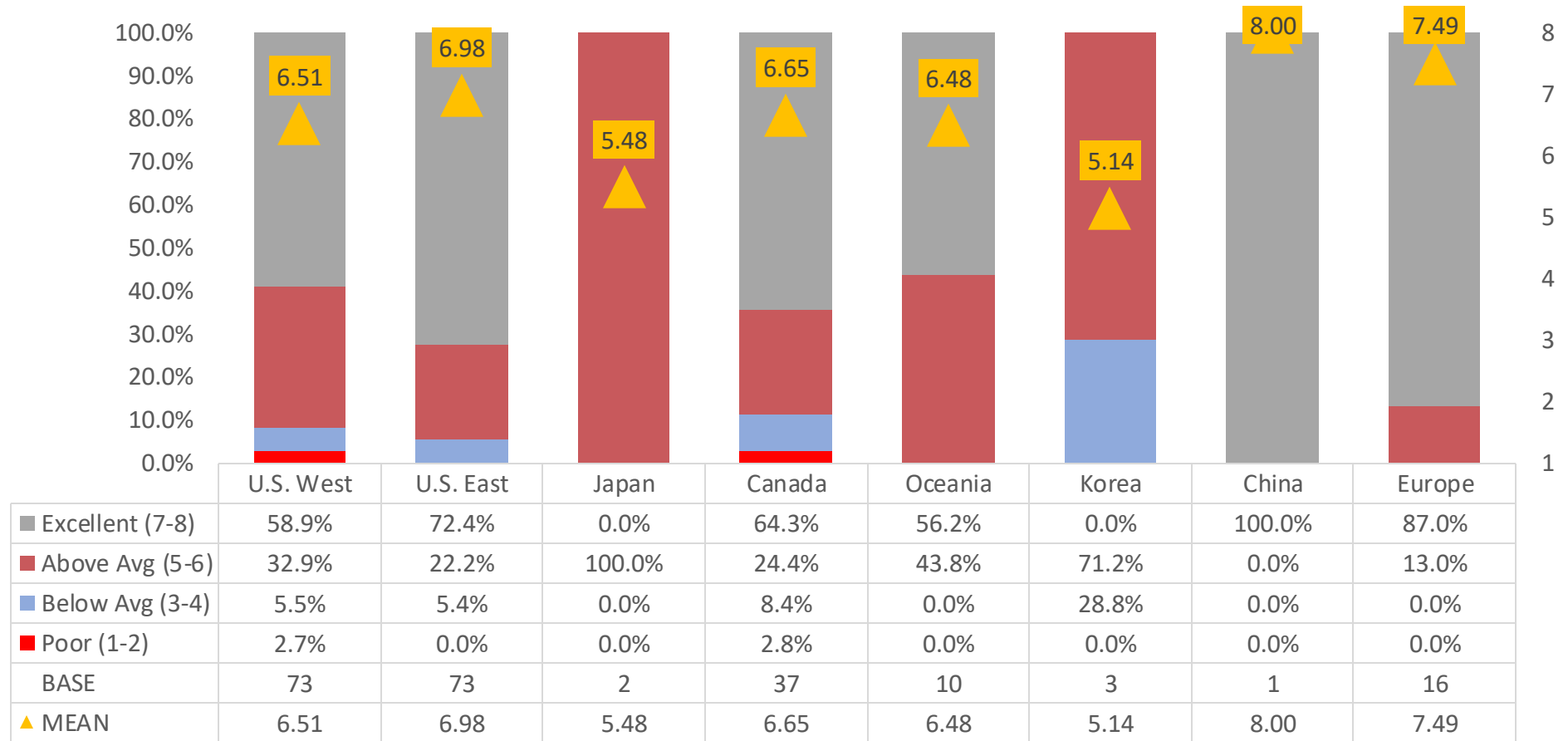
OVERALL ACCESSIBILITY - RESTAURANTS

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



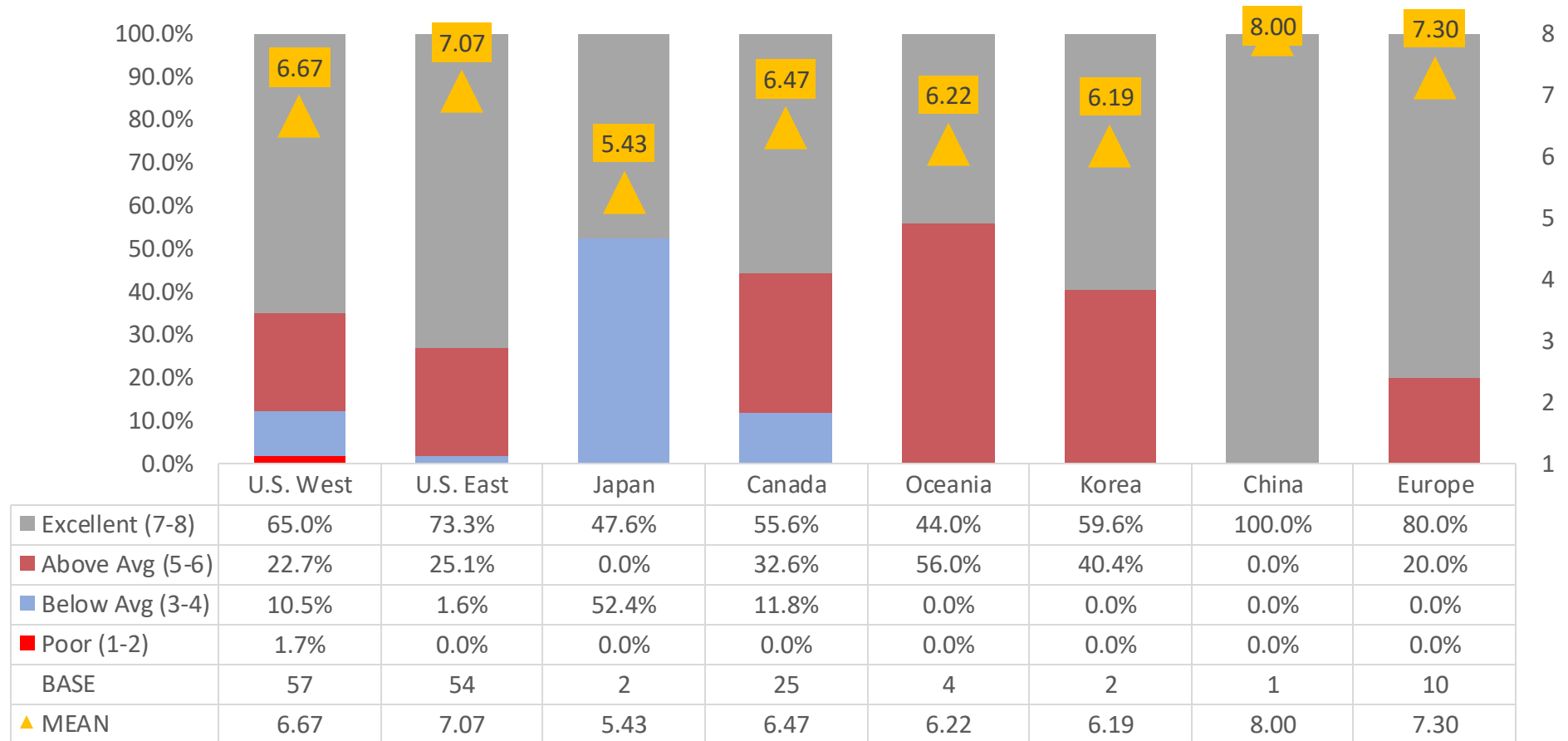
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



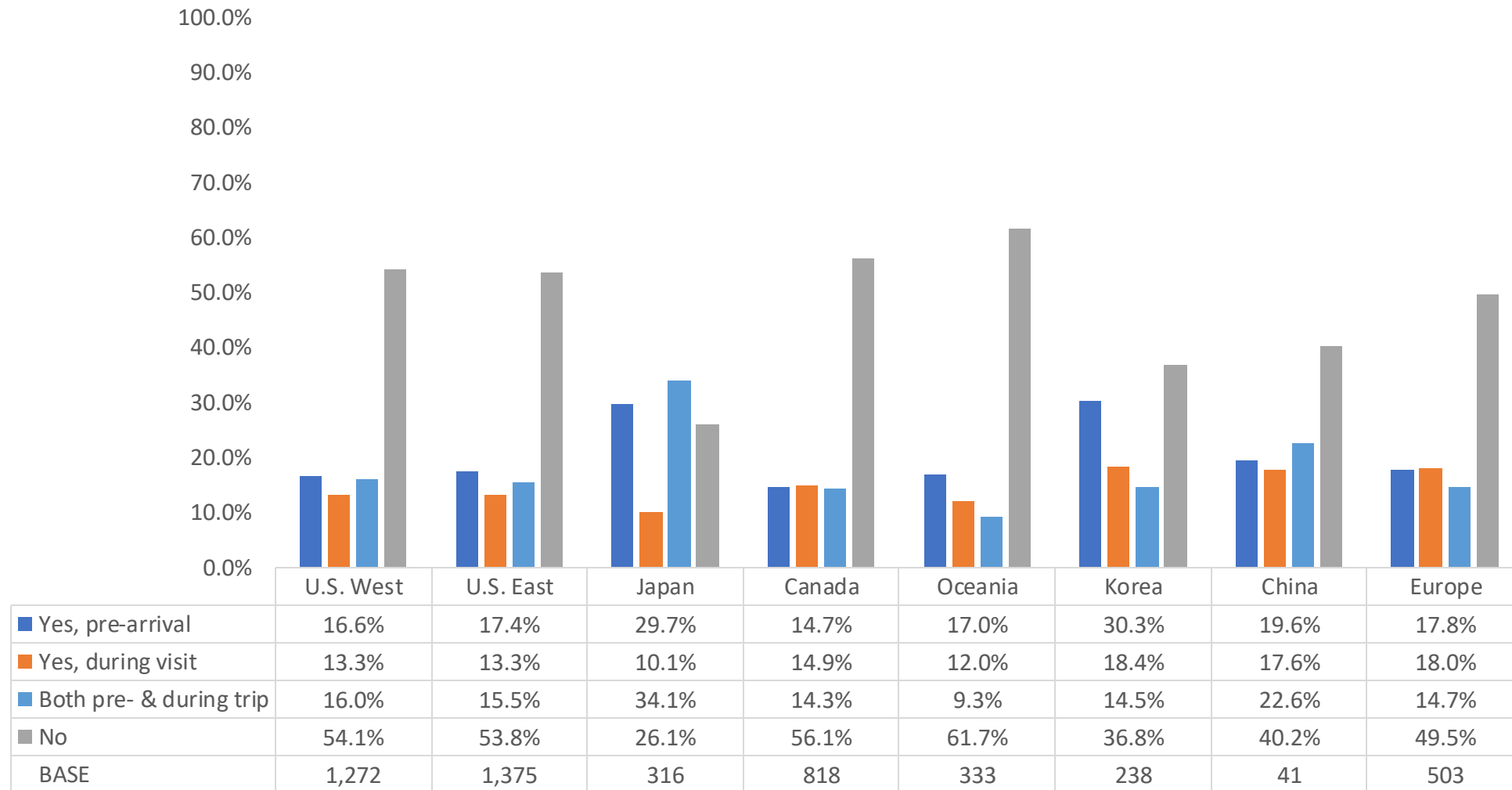
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

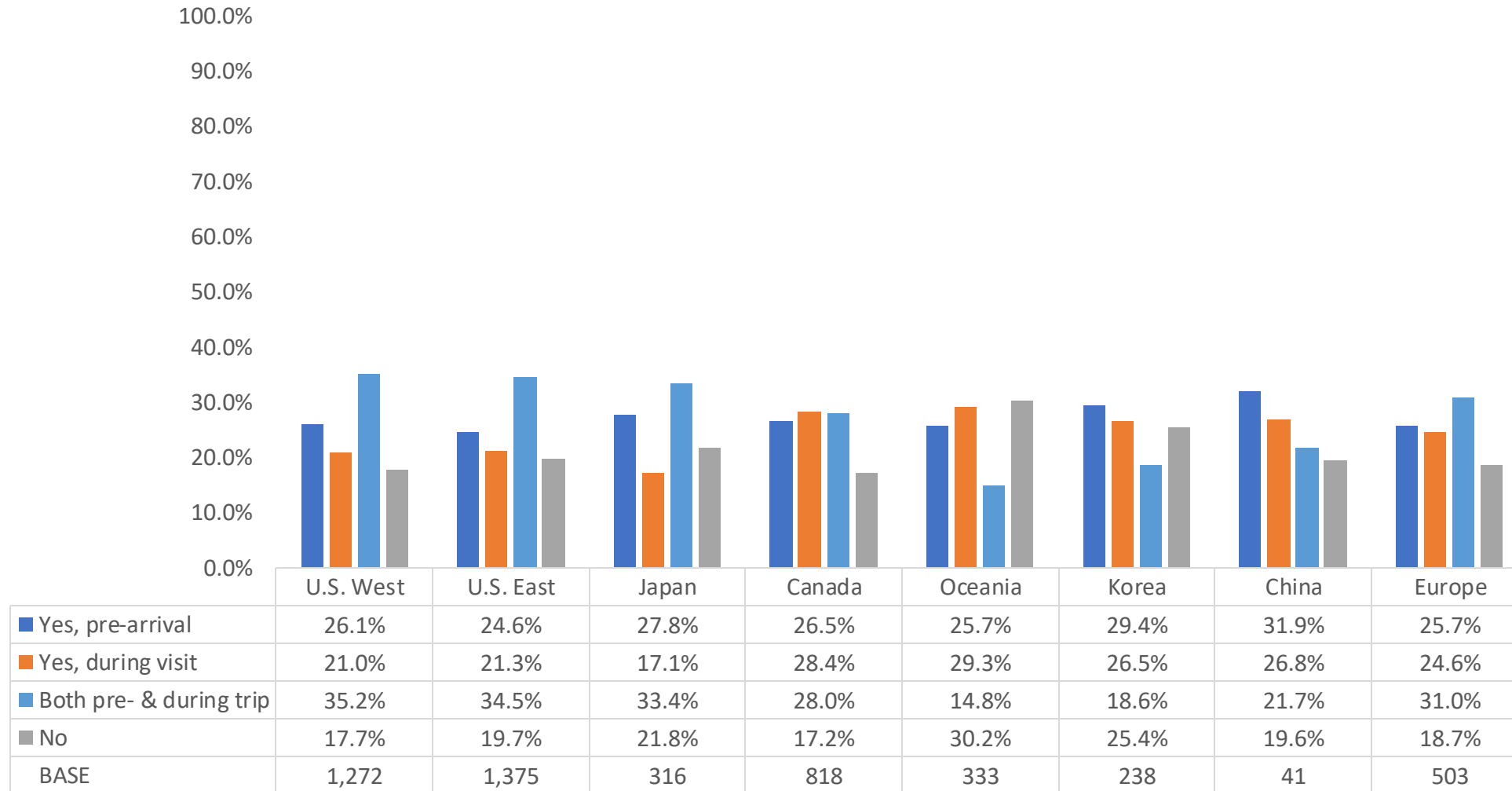


Section 4 – Messaging

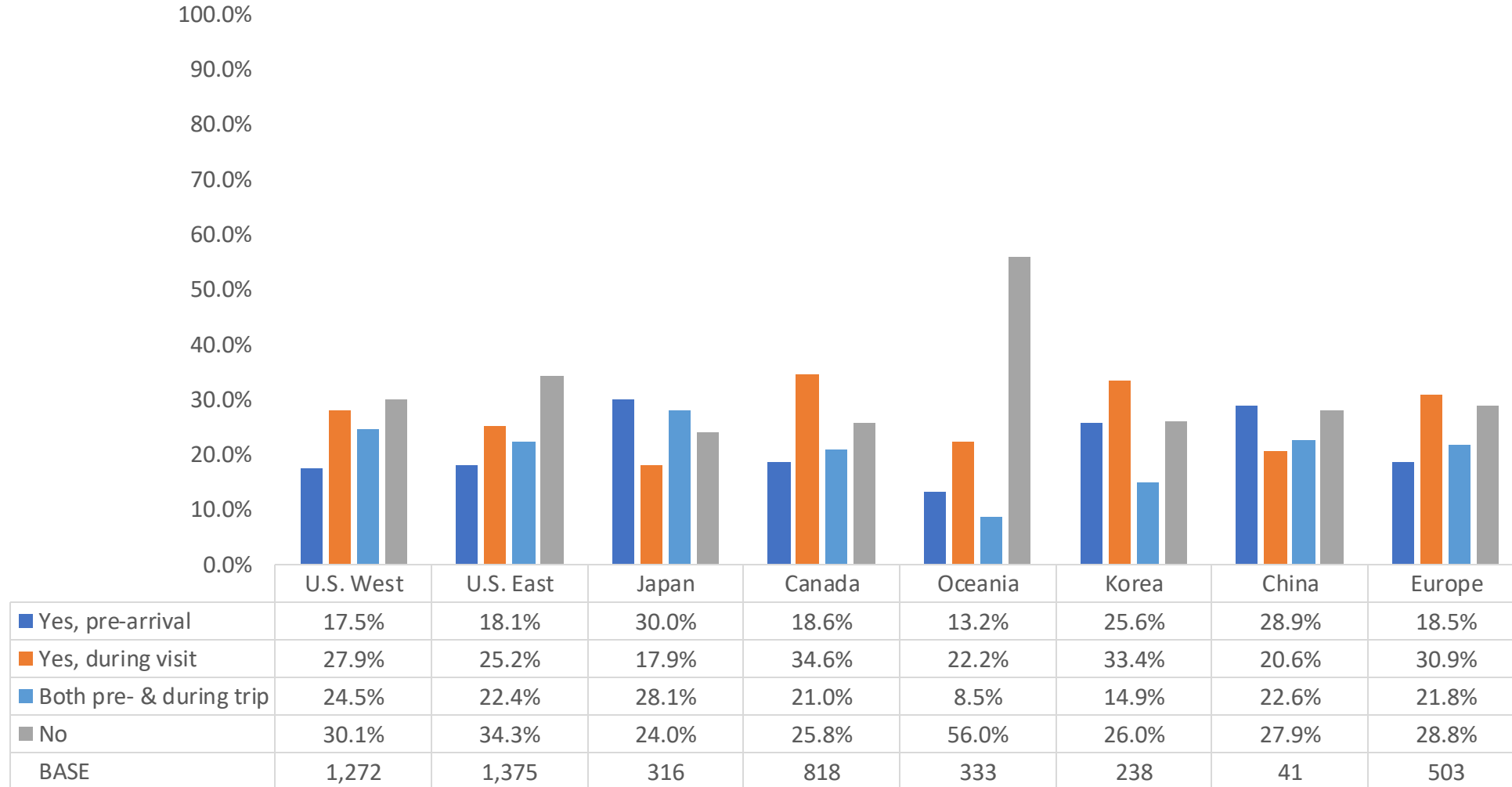
SAFE AND RESPONSIBLE TRAVEL



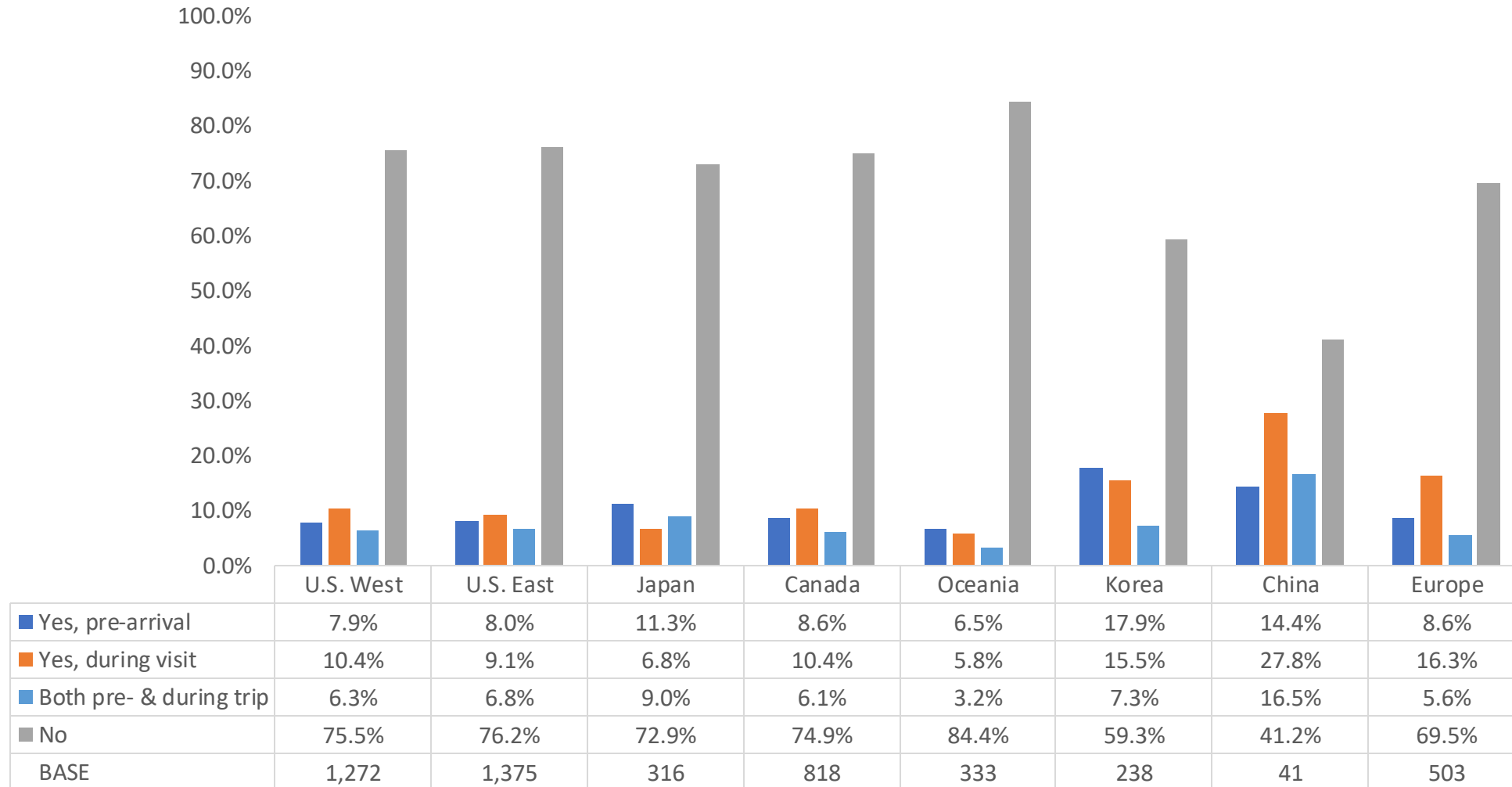
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



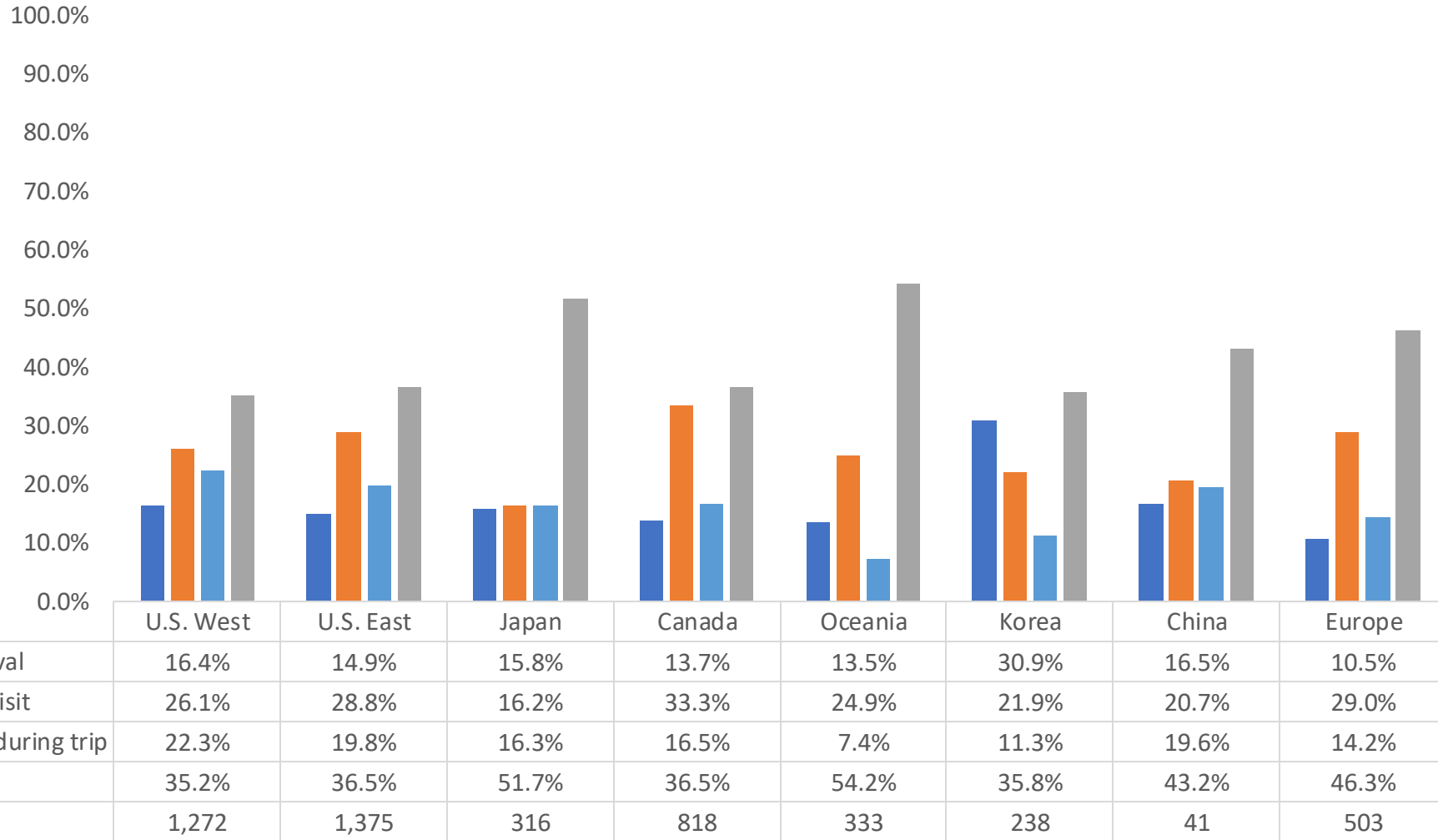
OCEAN AND HIKING SAFETY



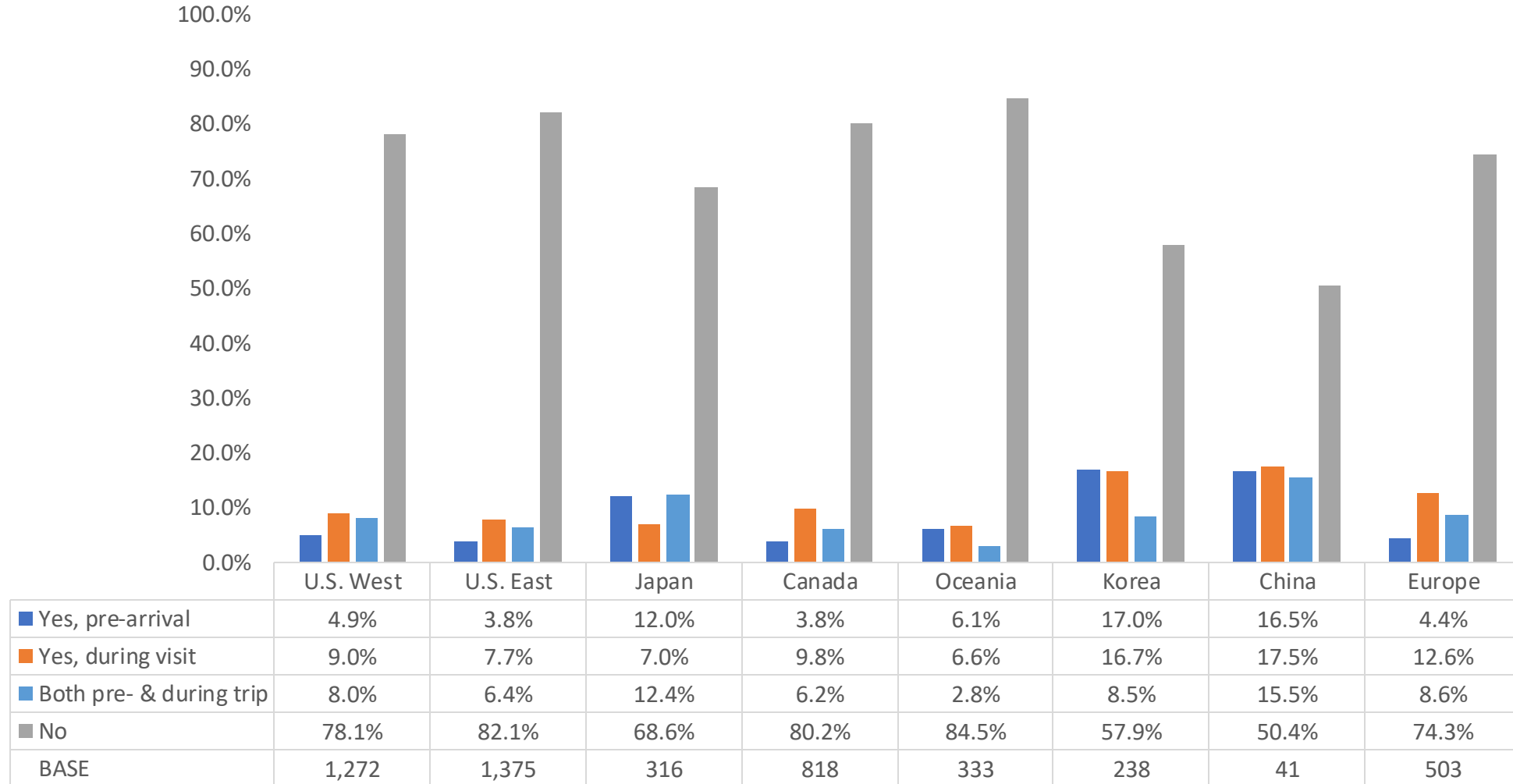
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL



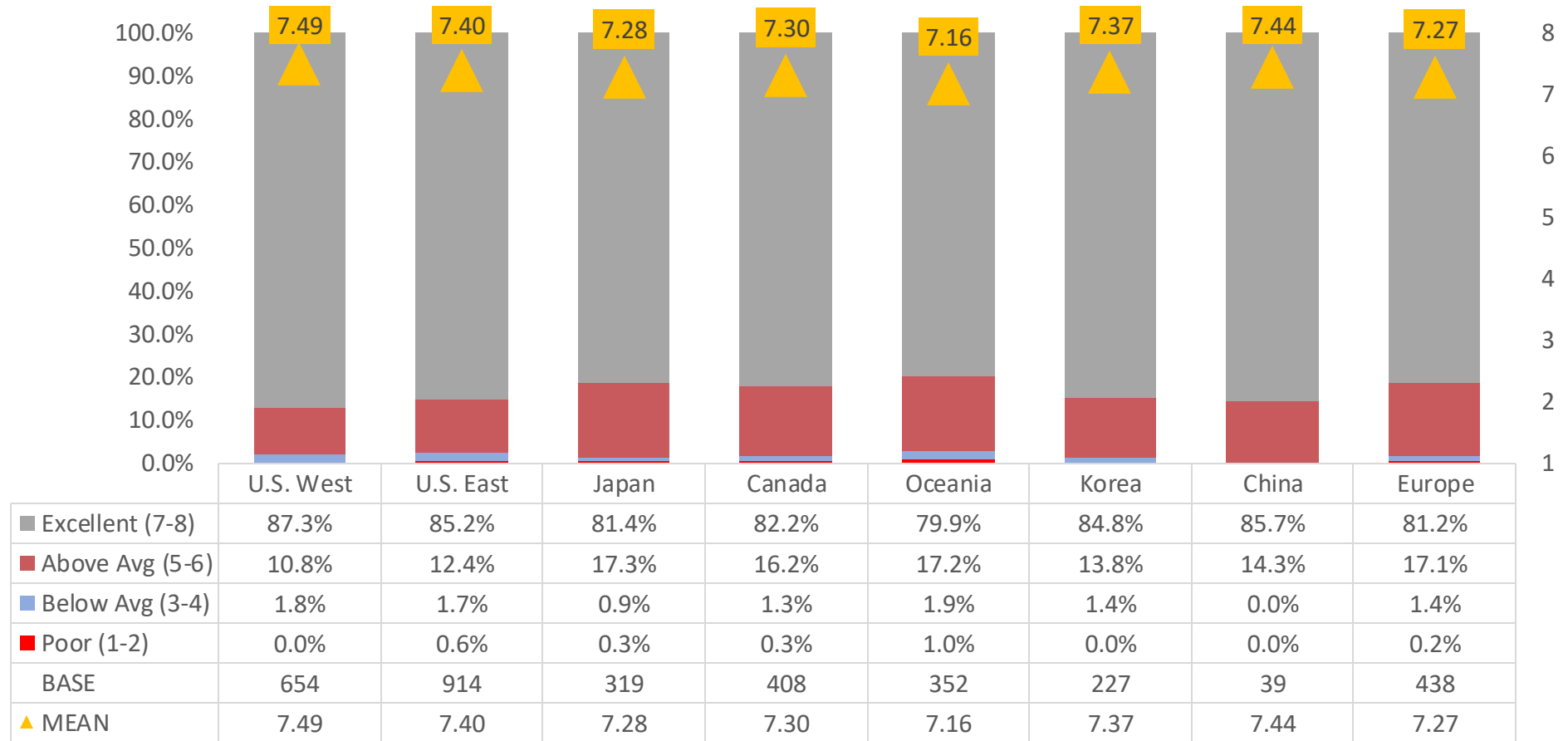
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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



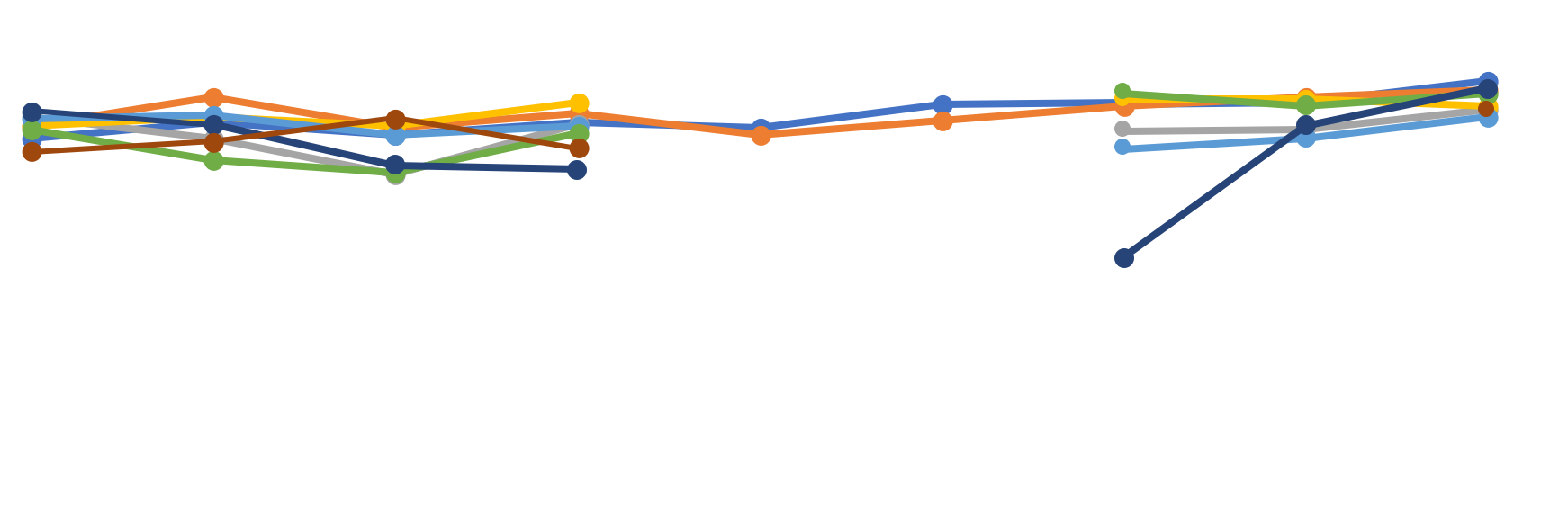
SATISFACTION - O'AHU

- **Gender:** Male respondents from **U.S. West** expressed higher levels of satisfaction compared to female respondents from this visitor market. Females from **Japan** were more satisfied with their stay than males.
- **Age:** Seniors (65 years and older) from **Japan** gave lower satisfaction scores compared to younger travelers from this visitor market.
- **Islands visited:** Visitors from **U.S. West, Japan** 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.
- **Household income:** Those who reside in homes in the bottom income tier (<\$100K) from **U.S. West** gave higher satisfaction scores than more affluent travelers from this visitor market.
- **Trips to Hawai'i:** First-time visitors from **Japan** were more satisfied with their stay than repeat visitors from this market.

SATISFACTION - O'AHU

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

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



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	75.8%	79.0%	76.6%	79.0%	78.1%	82.6%	82.8%	83.0%	87.3%
U.S. East	78.2%	83.8%	77.8%	80.6%	76.5%	79.5%	82.2%	83.9%	85.2%
Japan	79.9%	75.7%	68.8%	78.7%			77.5%	77.7%	81.4%
Canada	78.4%	80.2%	78.3%	82.8%			83.5%	83.5%	82.2%
Oceania	79.6%	80.5%	76.6%	78.3%			73.8%	75.9%	79.9%
Korea	77.6%	71.5%	69.2%	76.9%			84.7%	82.3%	84.8%
China	81.2%	78.5%	70.5%	69.6%			52.3%	78.3%	85.7%
Europe	73.3%	75.1%	79.8%	73.9%					81.2%

P= Preliminary Data

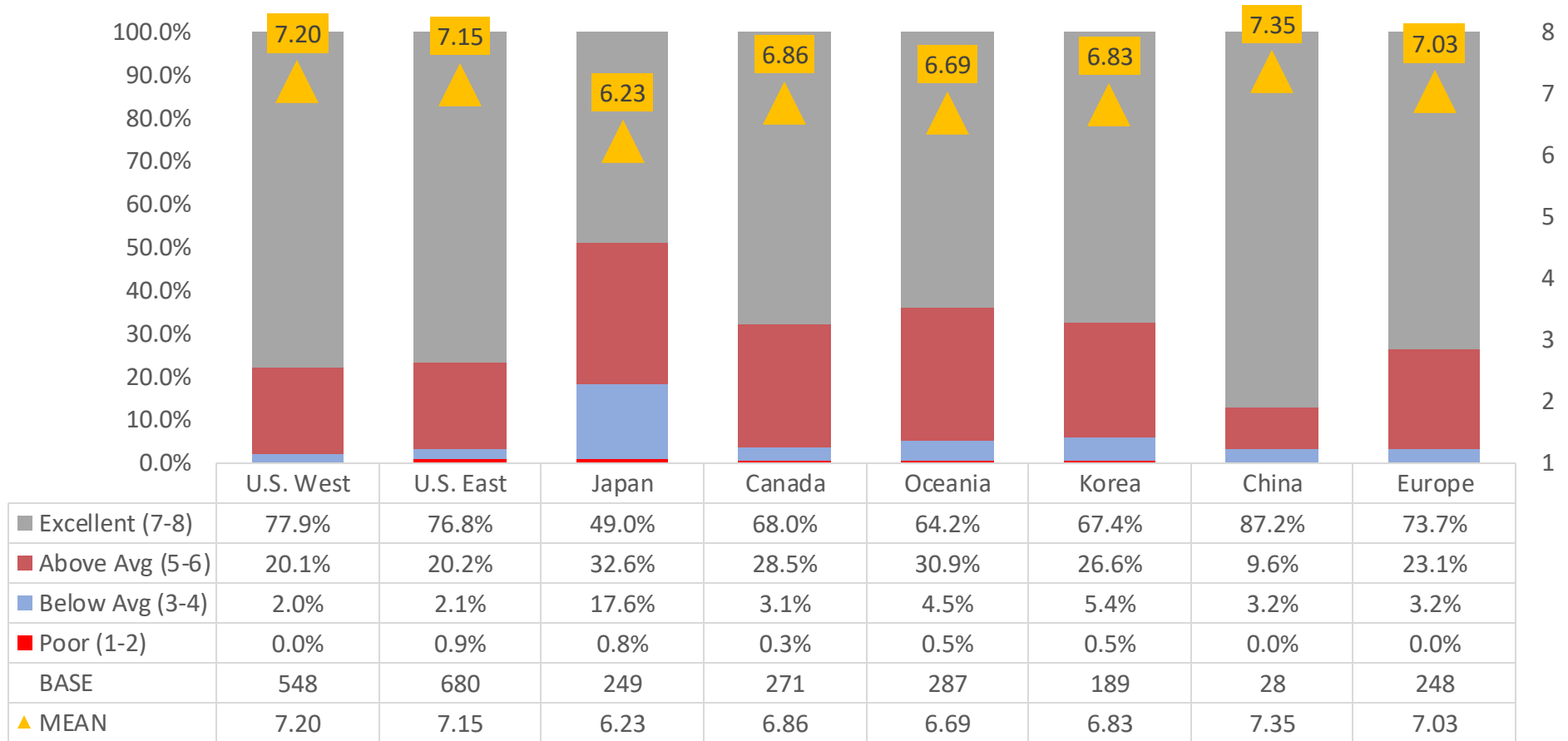
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



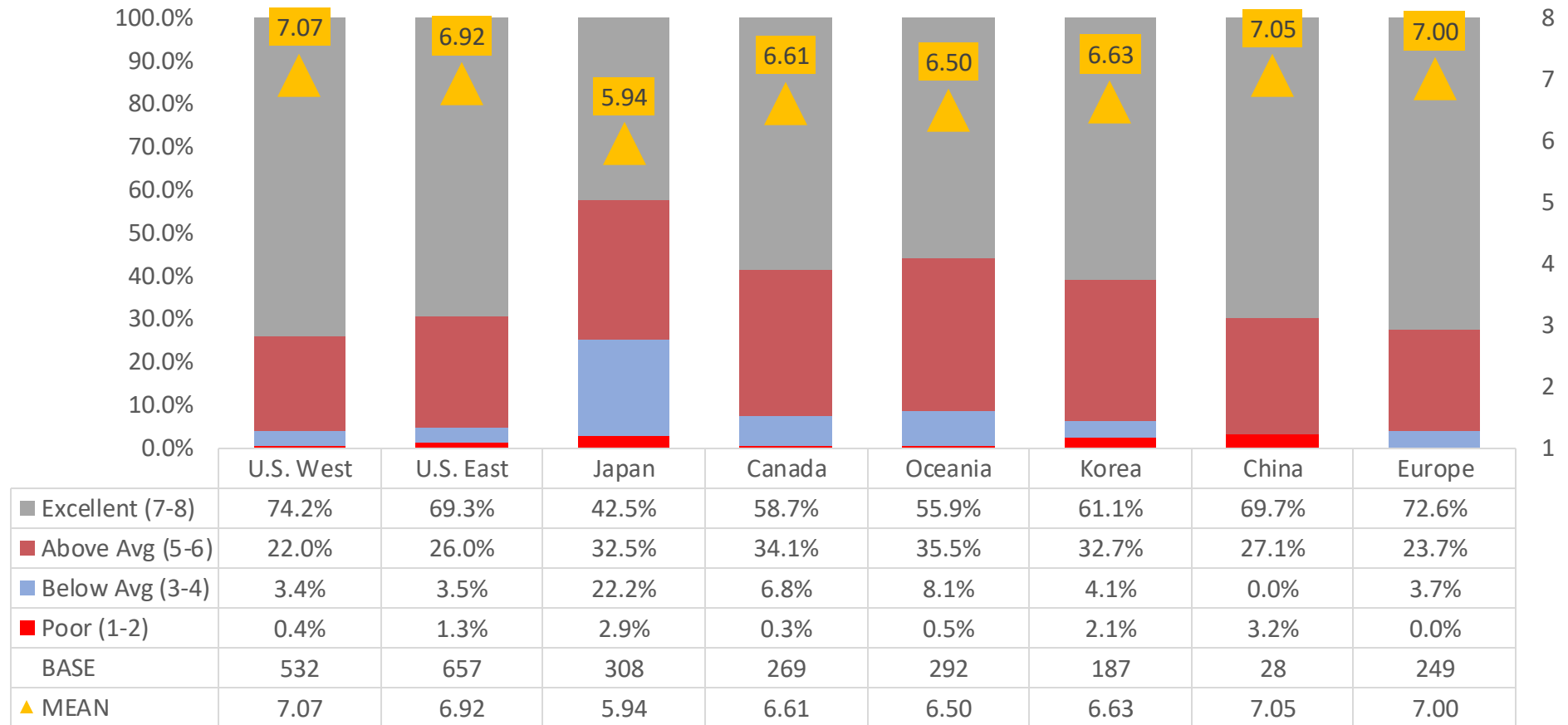
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



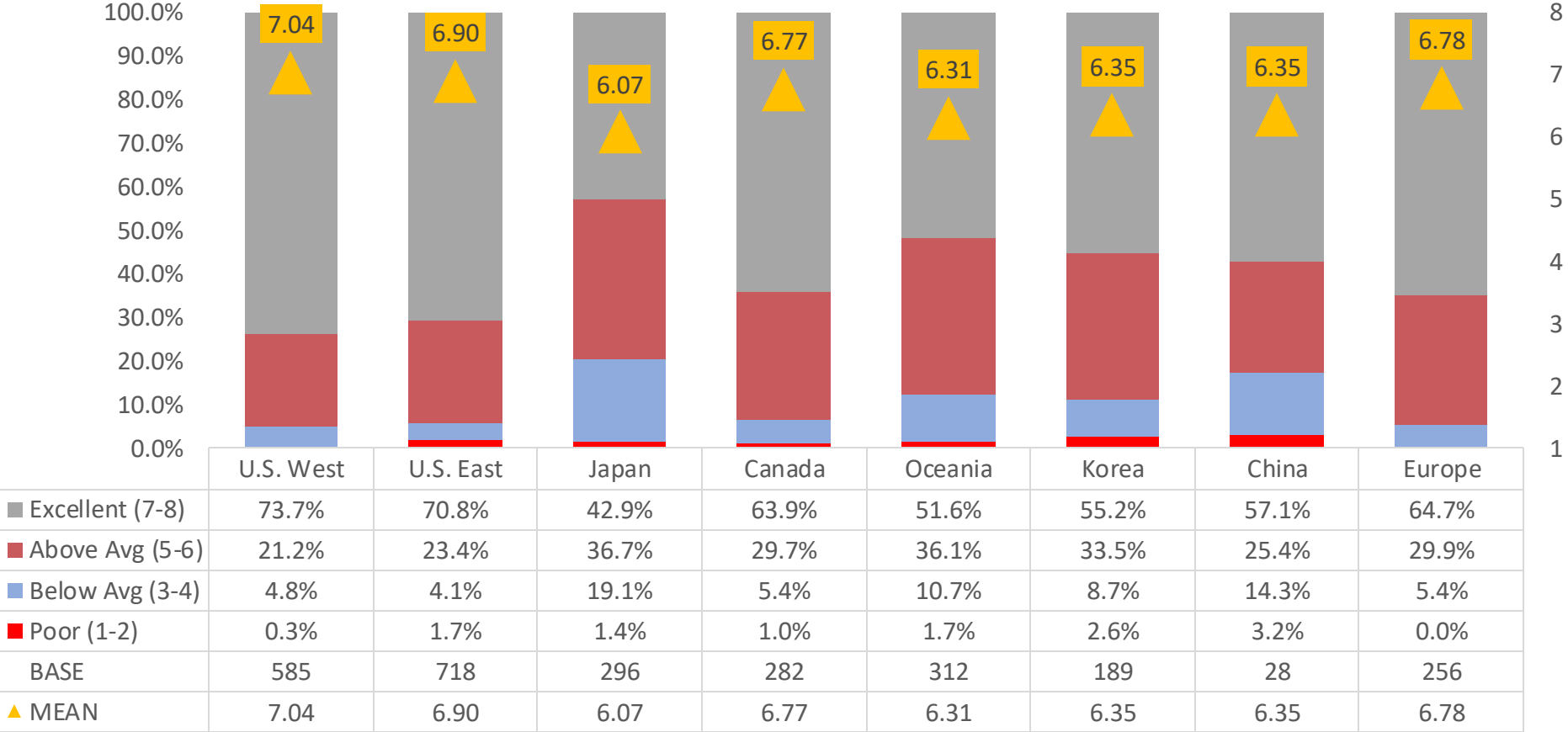
SHOPPING - O'AHU

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



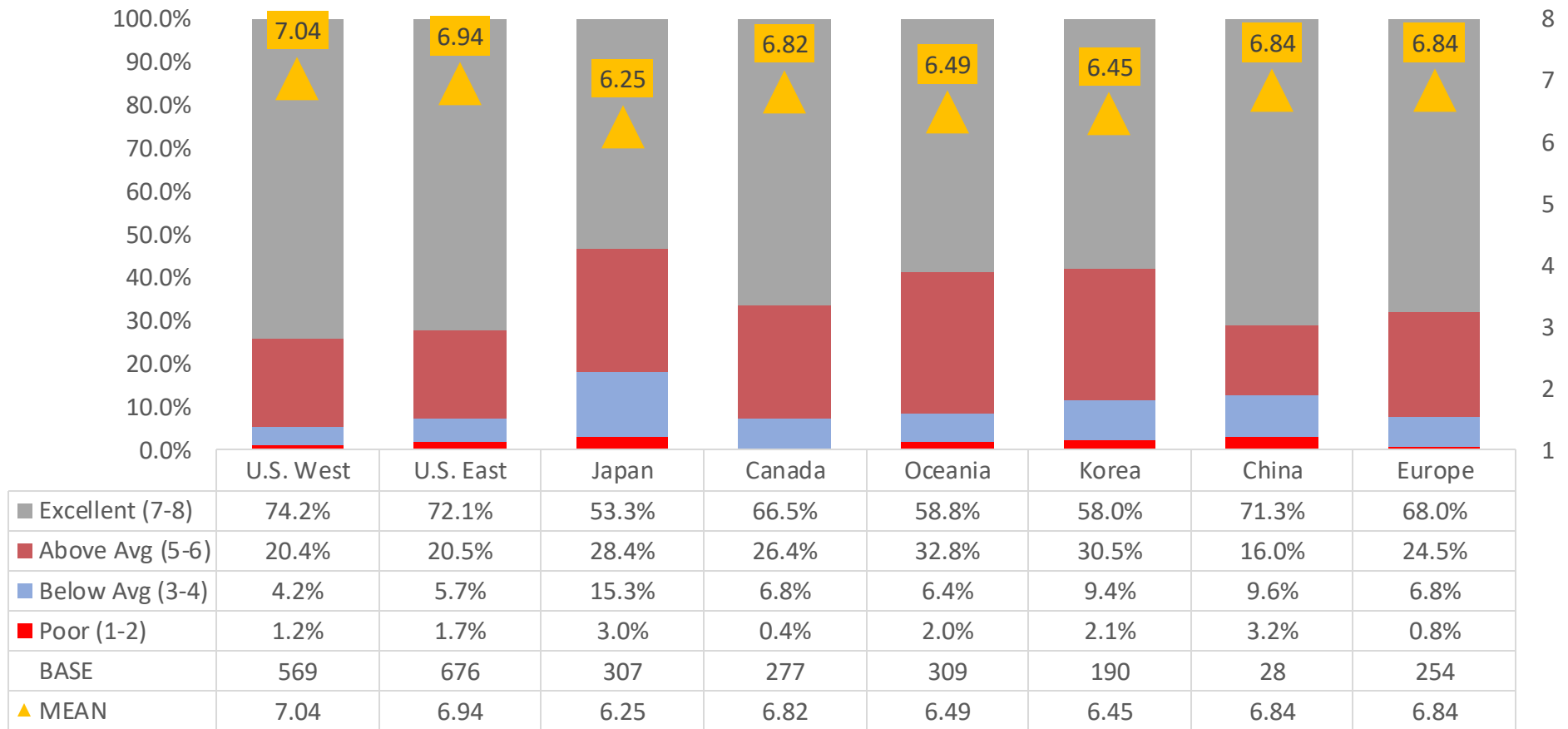
DINING/ FOOD & BEVERAGES - O'AHU

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



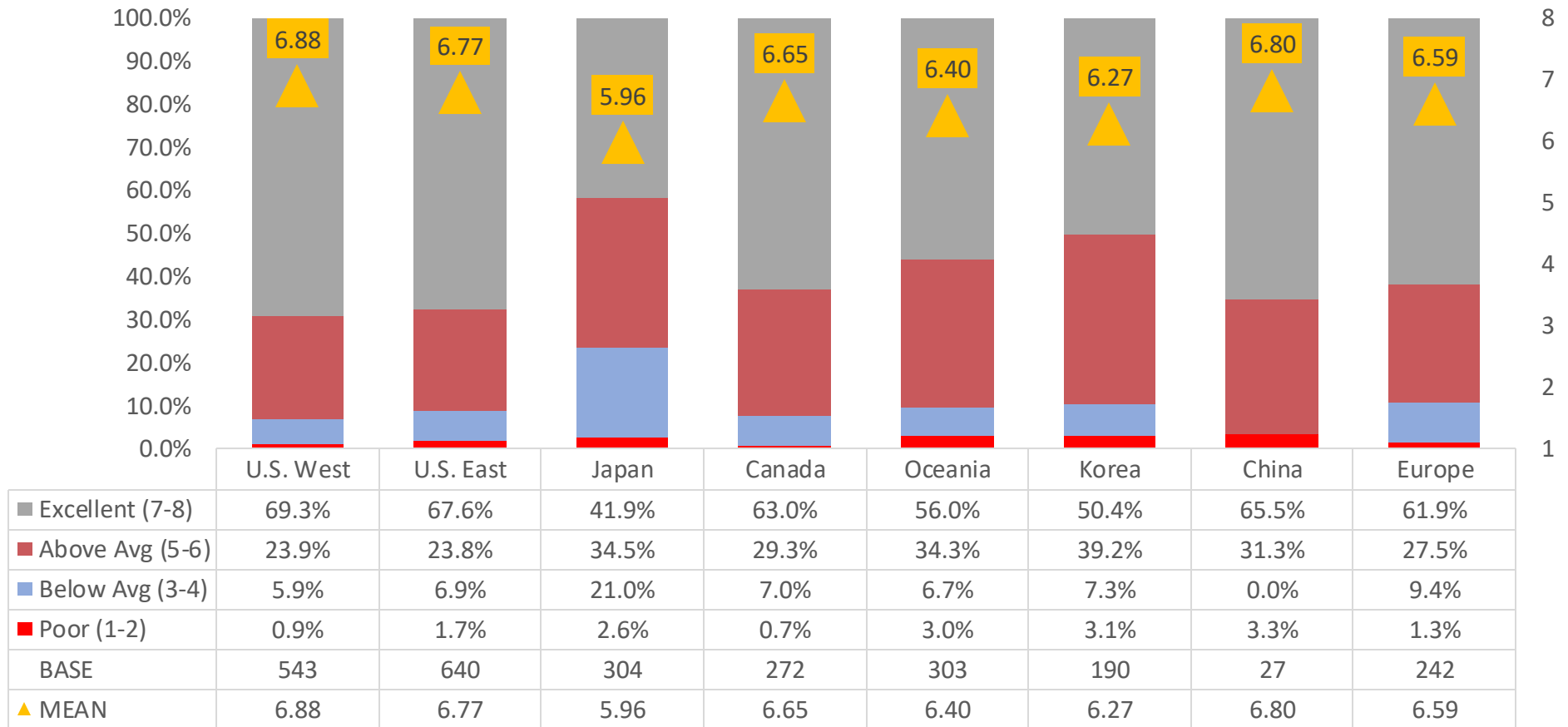
LODGING/ ACOMMODATIONS - O‘AHU

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



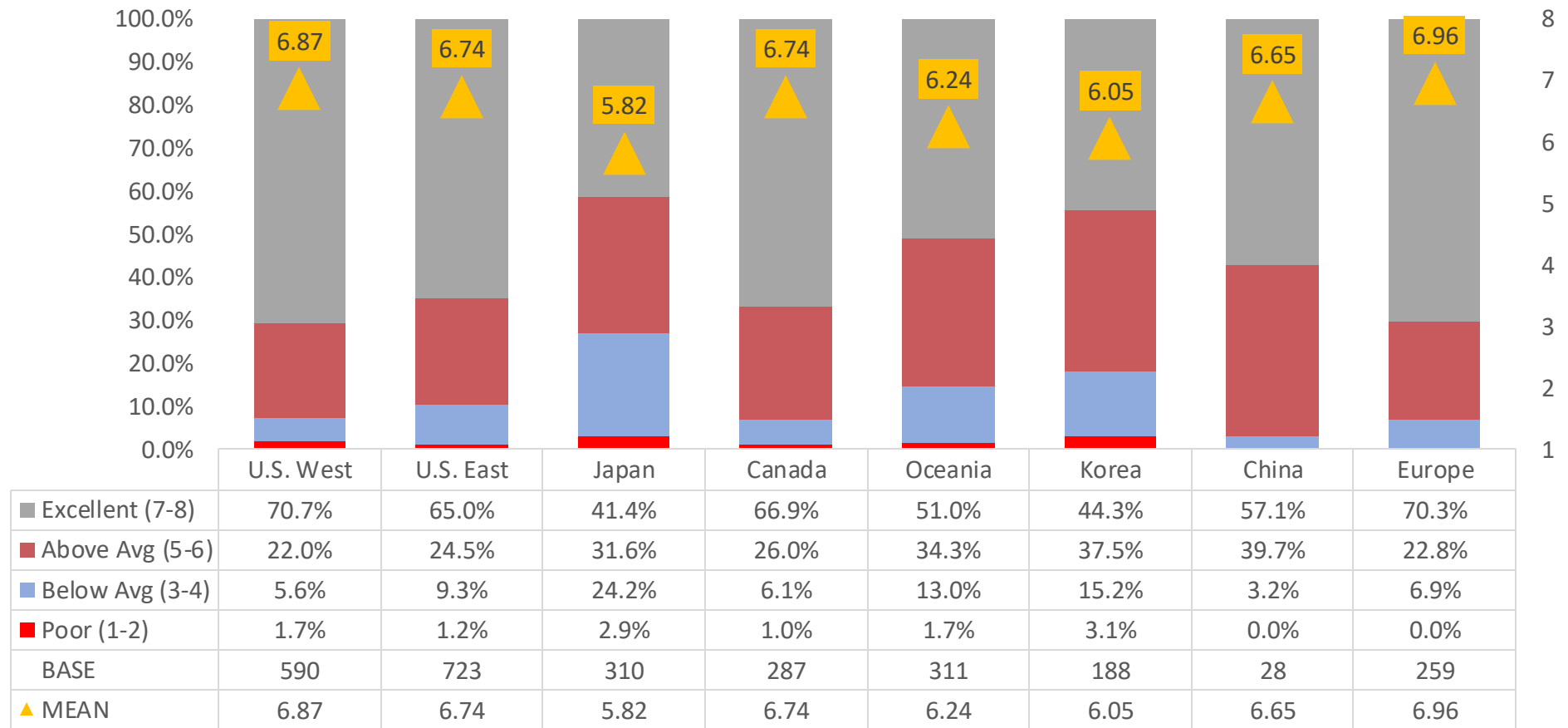
TRANSPORTATION ON ISLAND - O'AHU

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



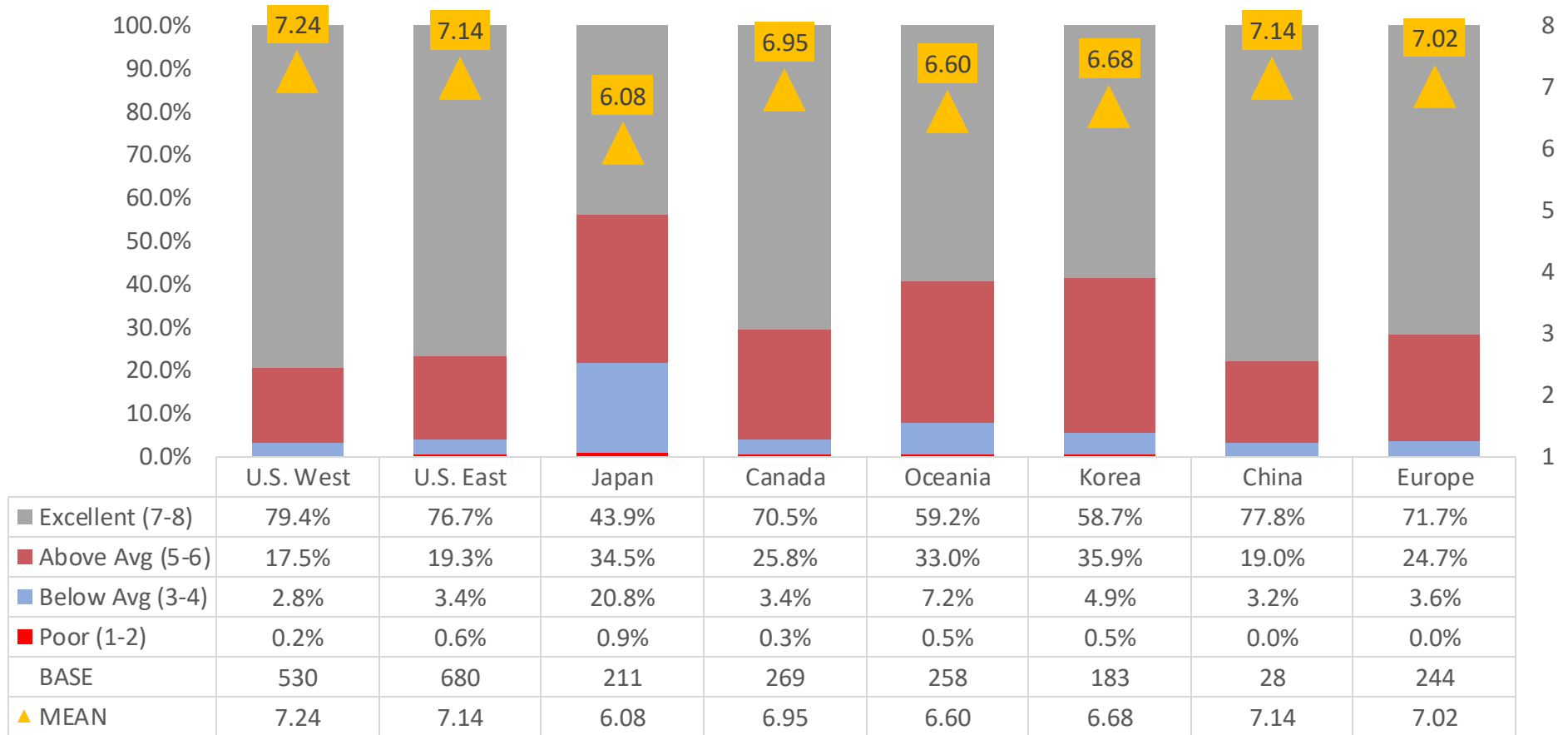
AIRPORT - O'AHU

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



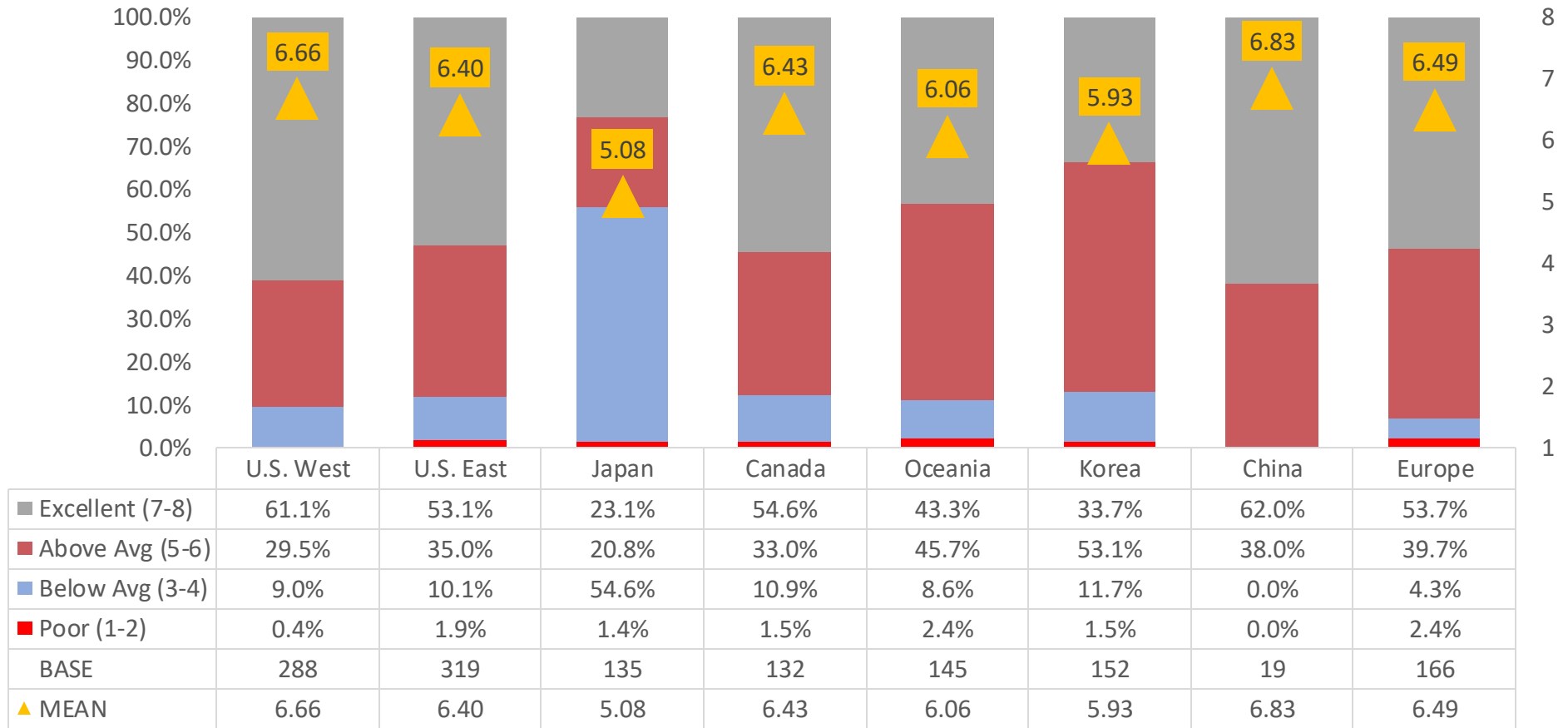
CULTURAL EXPERIENCES - O'AHU

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



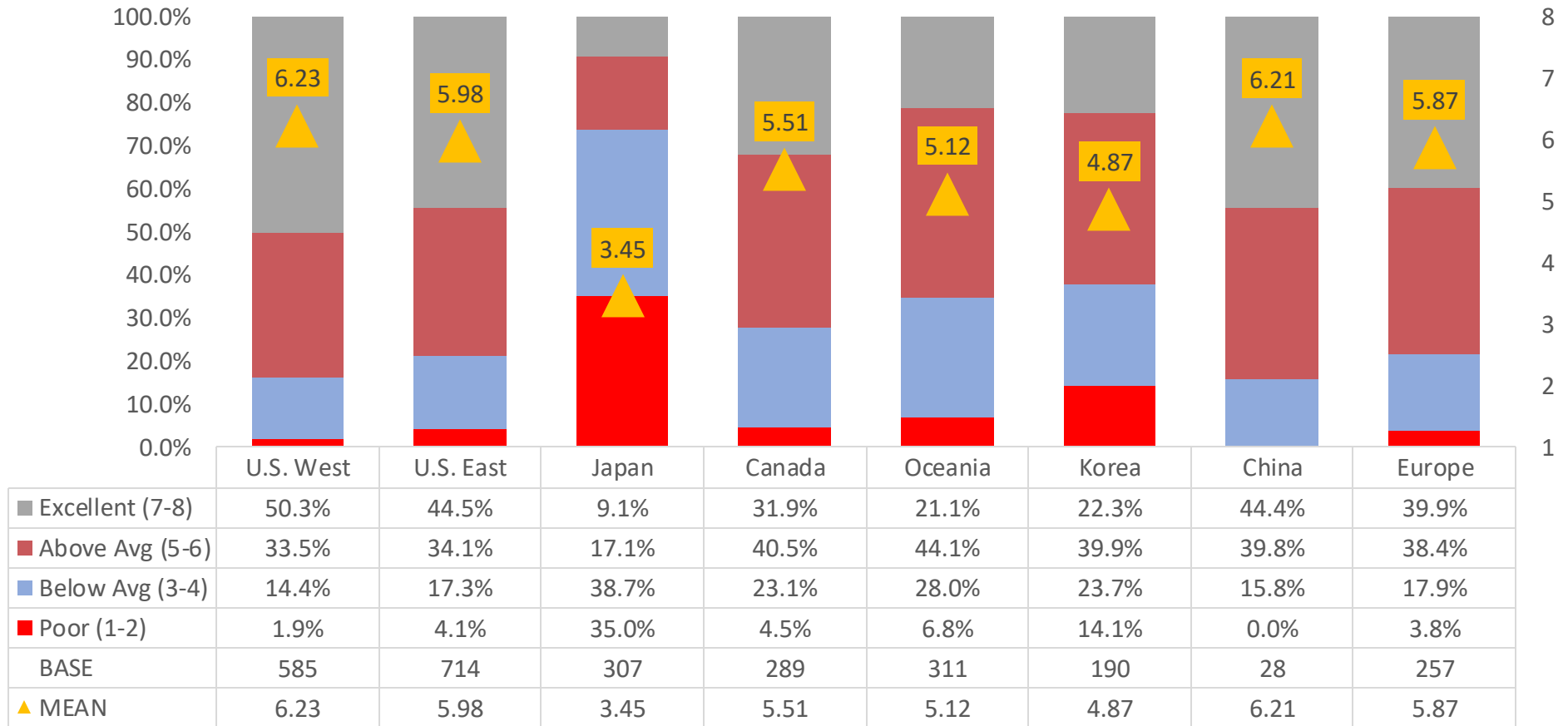
VOLUNTEER EXPERIENCES - O'AHU

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



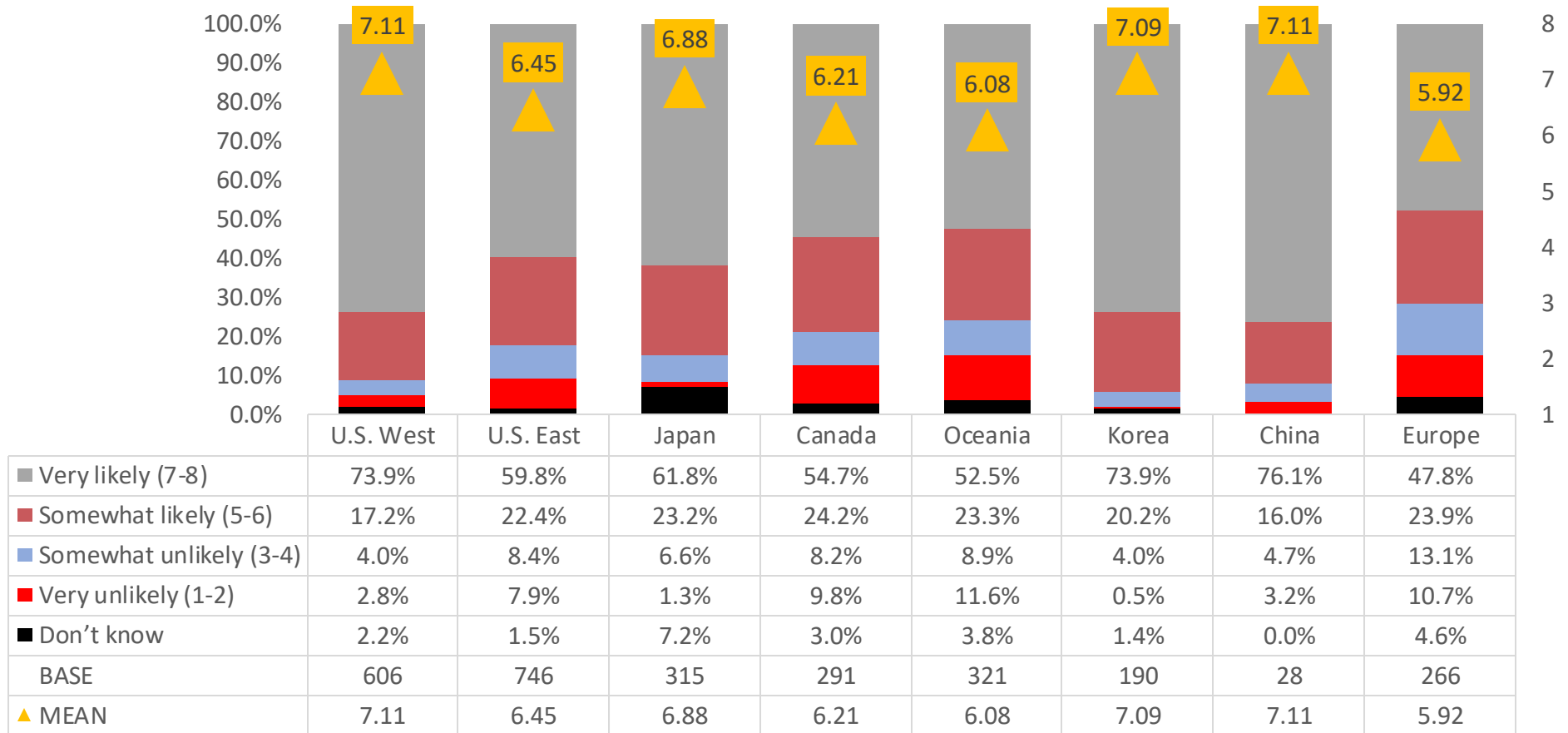
OVERALL VALUE FOR THE MONEY – O‘AHU

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



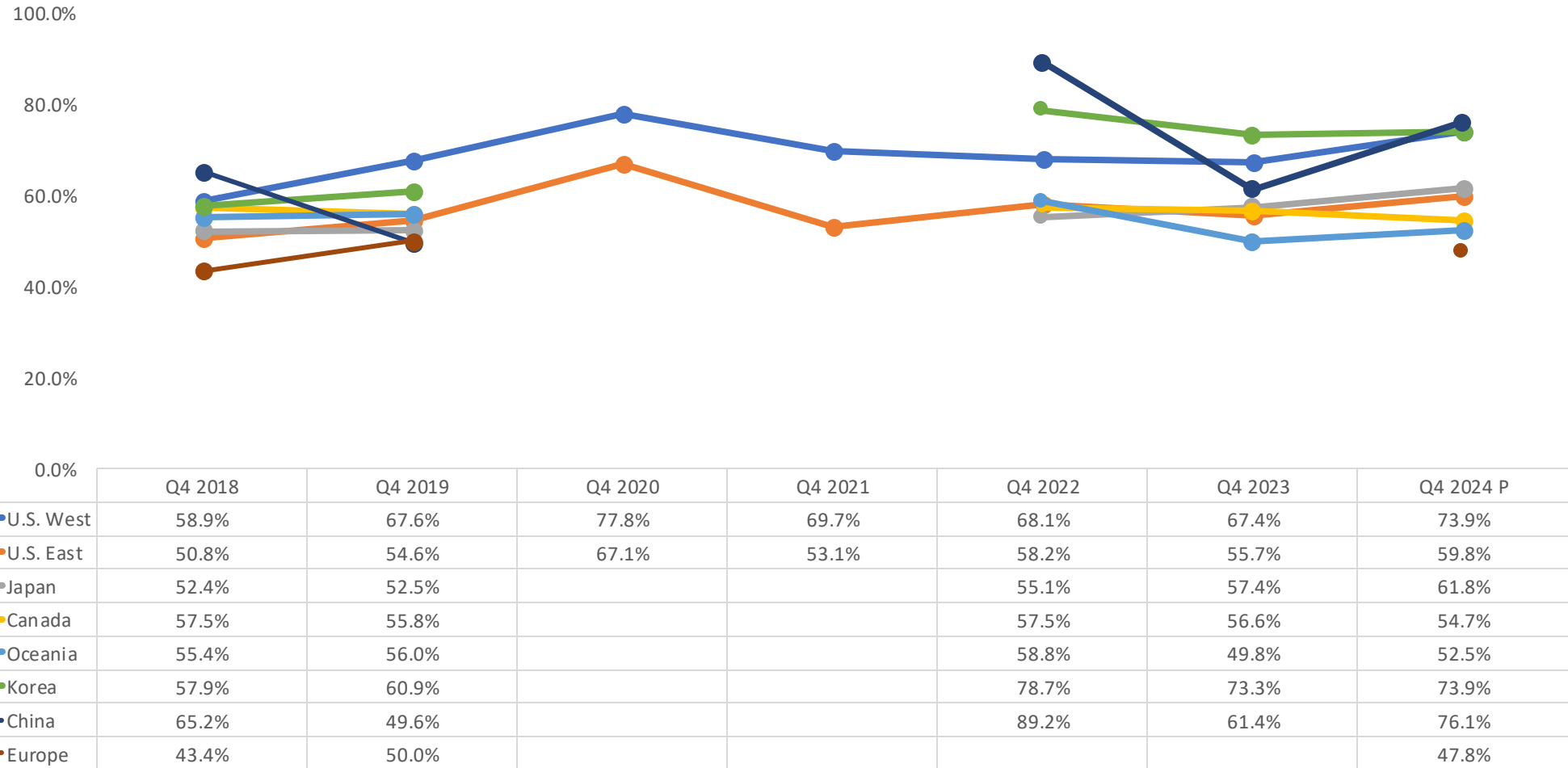
LIKELIHOOD OF RETURN VISIT - O‘AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)



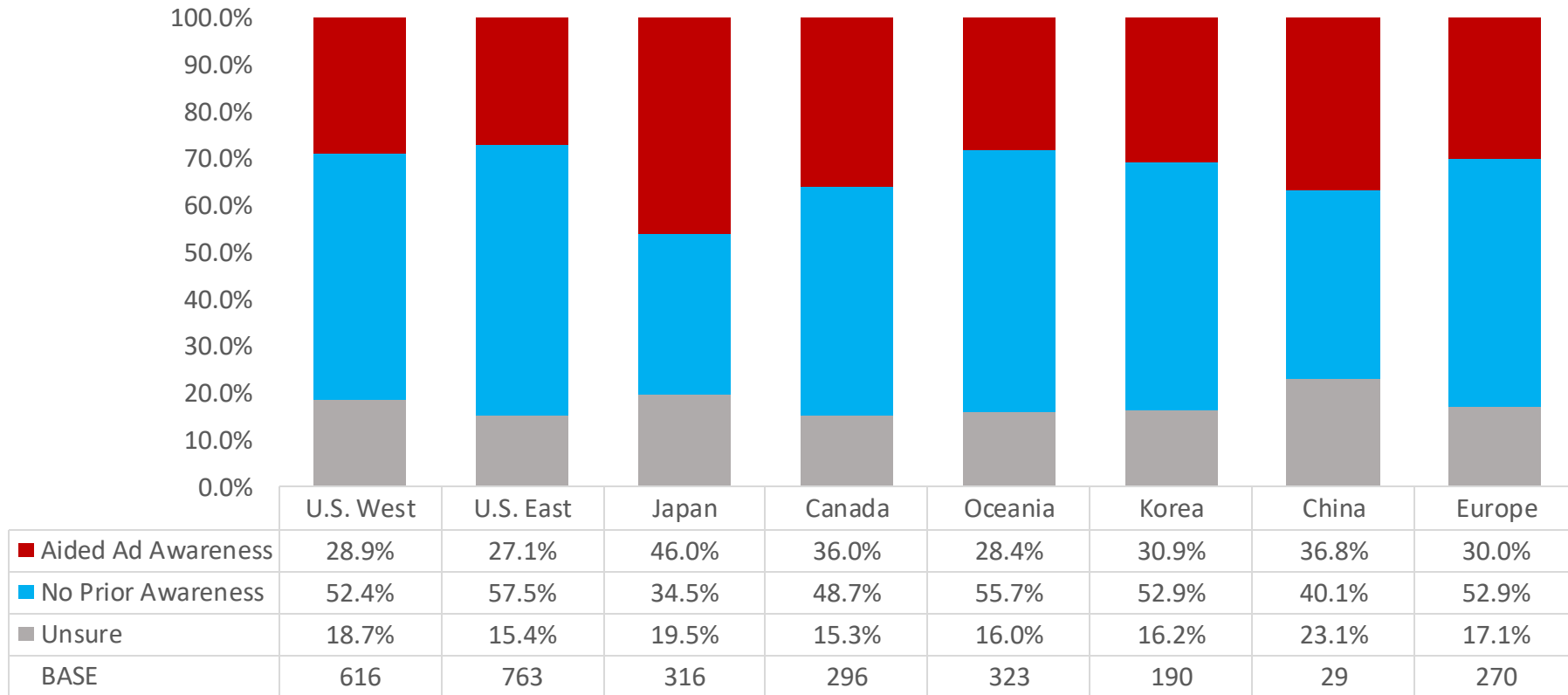
P= Preliminary Data

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.



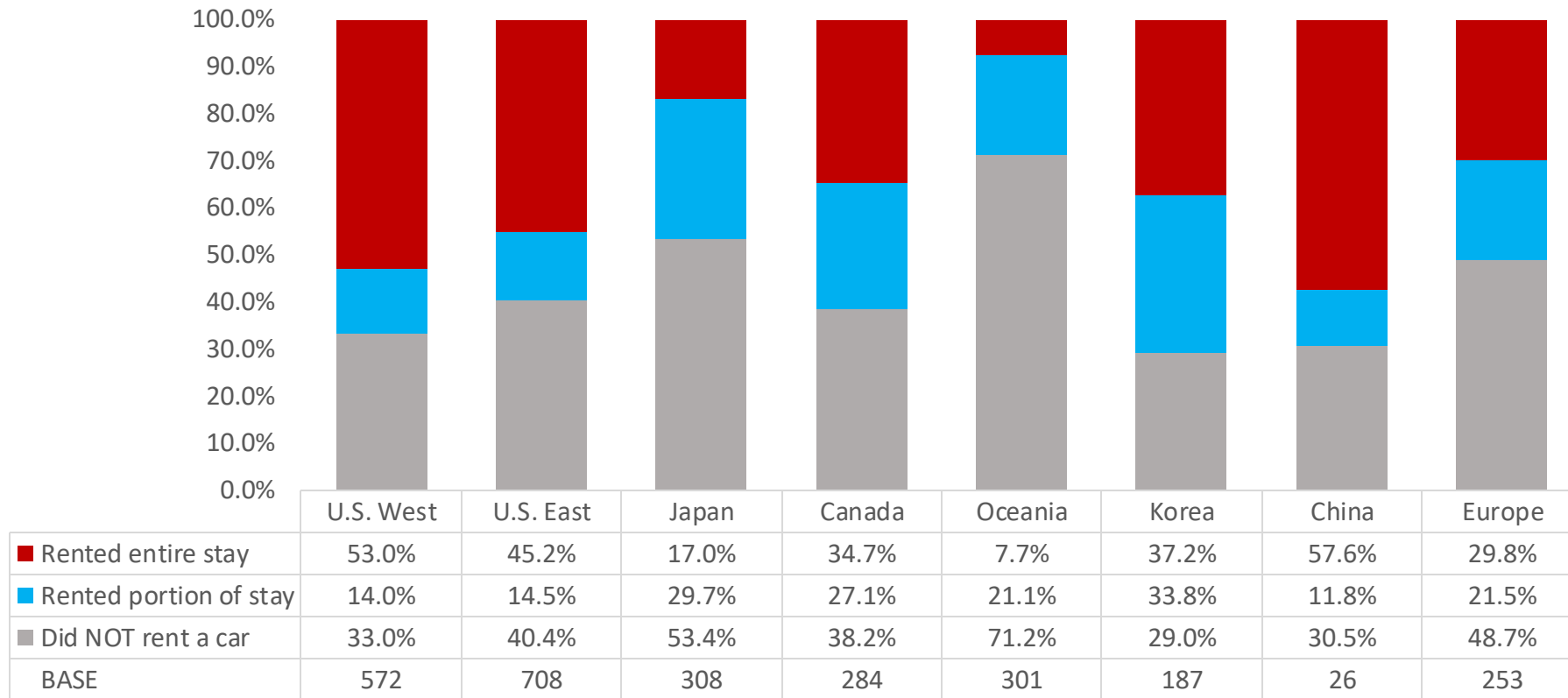
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	38.4%	43.3%	42.1%	49.2%	45.9%	64.7%	54.5%	57.1%
Hawaiian cultural events	15.4%	14.8%	16.7%	17.8%	12.8%	27.7%	6.1%	17.3%
Social media posts and videos	12.9%	13.3%	31.8%	21.6%	19.3%	24.6%	22.3%	18.1%
Television programs or movies filmed in Hawai'i	8.7%	9.4%	38.1%	16.9%	18.9%	18.4%	18.5%	27.1%
Outdoor or sporting activities and events	14.5%	13.0%	12.3%	16.3%	10.8%	15.3%	19.0%	14.9%
Hawaiian music	11.3%	5.9%	14.0%	9.9%	8.0%	3.1%	2.8%	12.8%
BASE	612	756	316	295	323	29	190	268

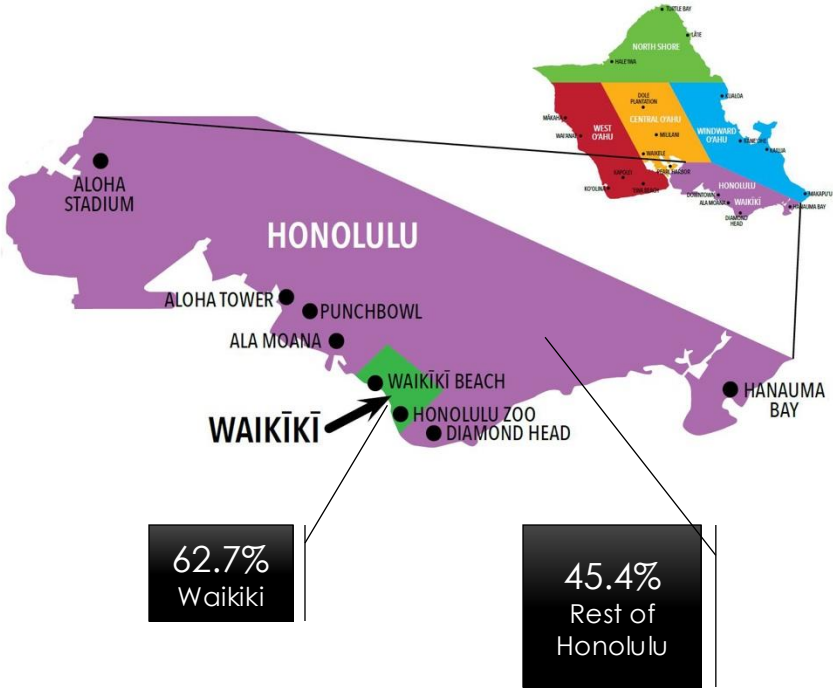
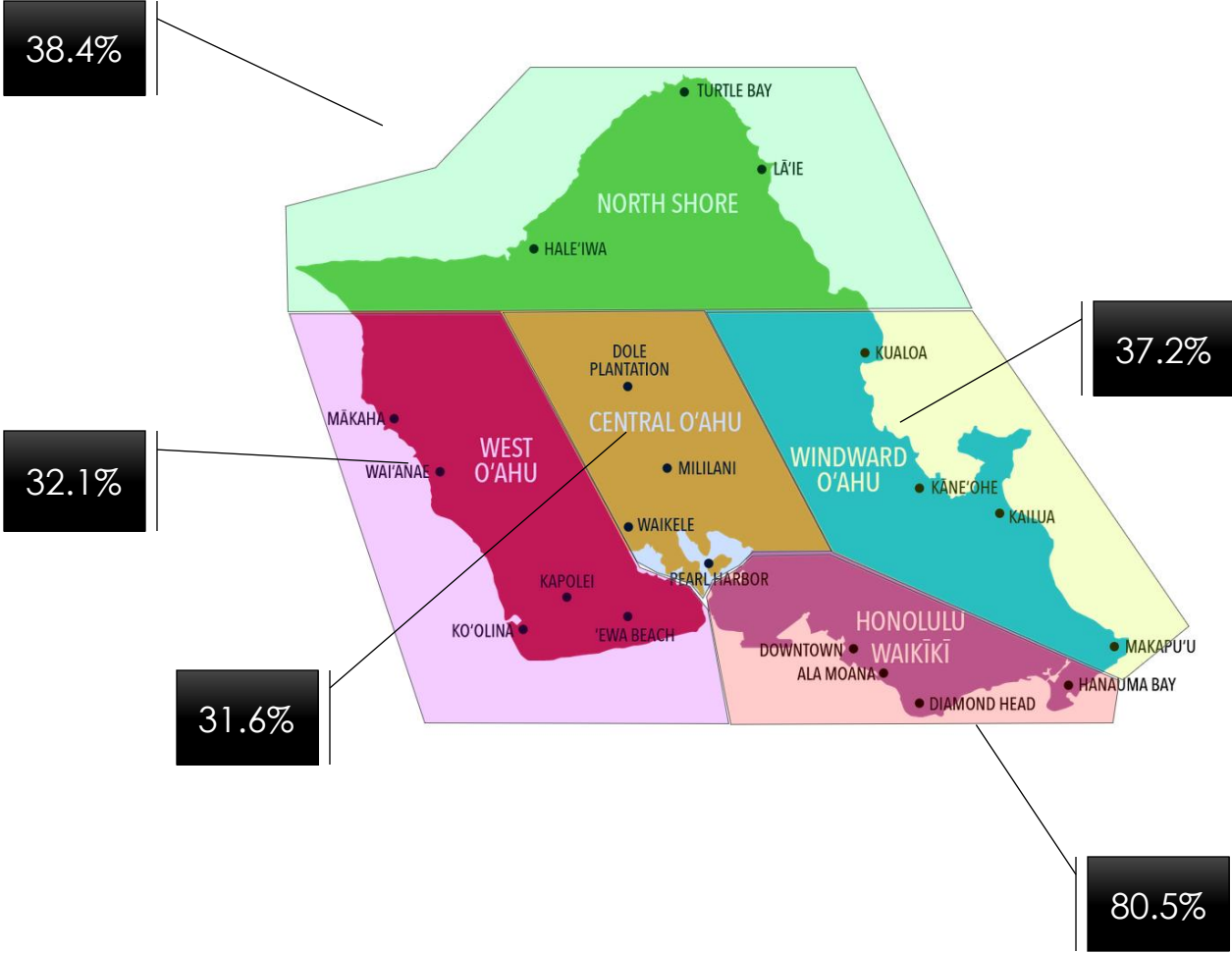
CAR RENTAL - O'AHU



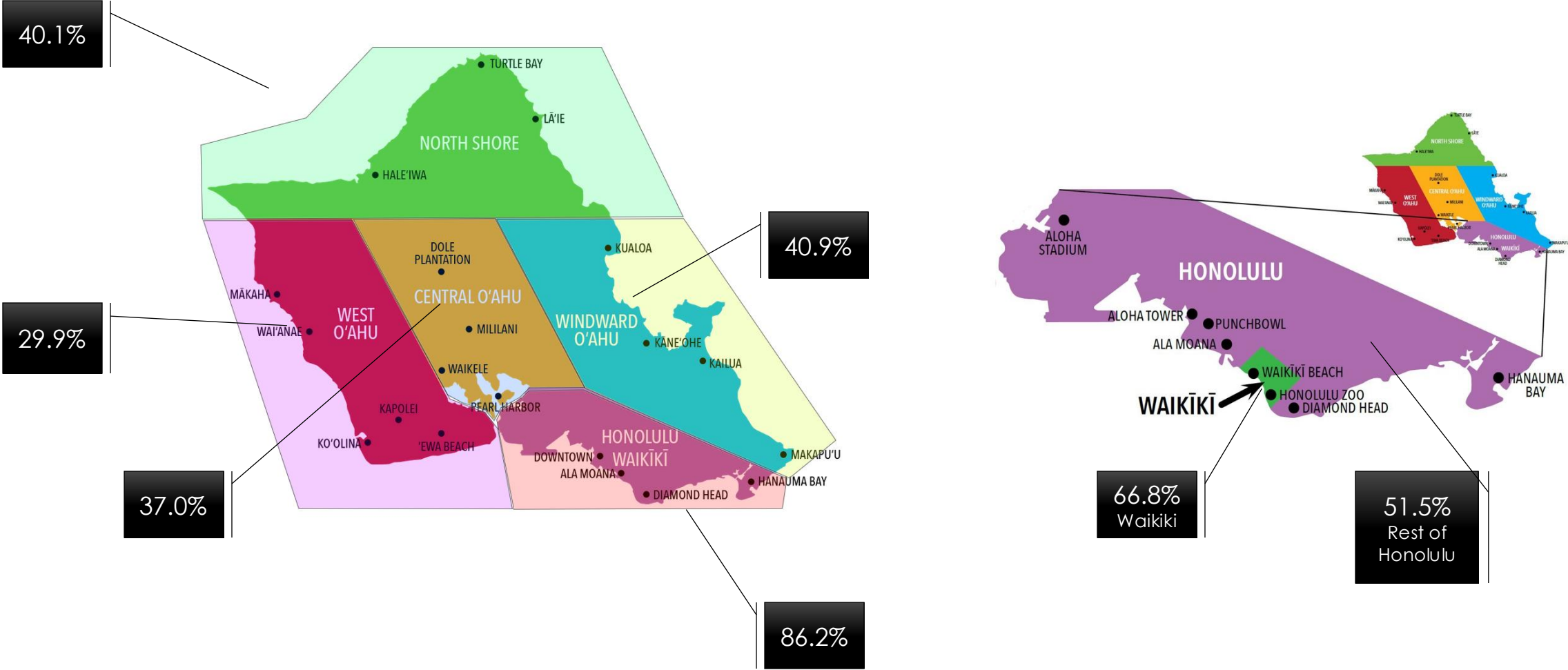
REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	71.8%	75.0%	75.9%	75.7%	81.0%	28.8%	61.0%	69.4%
Parking was too expensive at my hotel/ lodging	37.2%	37.9%	10.9%	38.2%	34.1%	42.4%	55.2%	25.0%
Car rental rates were too expensive	11.5%	13.5%	18.7%	20.5%	18.4%	0.0%	31.3%	15.6%
Wanted to reduce my carbon footprint	3.9%	3.9%	1.1%	10.4%	4.8%	0.0%	8.5%	18.8%
Vehicles were not available for all of my trip dates	2.6%	0.0%	3.5%	1.2%	0.0%	28.8%	3.5%	3.8%
BASE	78	102	91	78	63	3	65	52

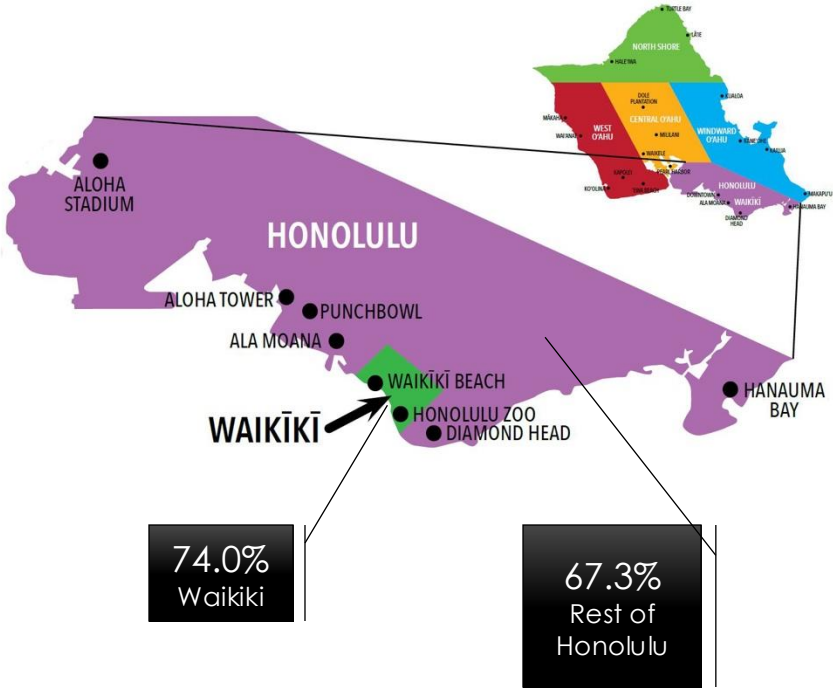
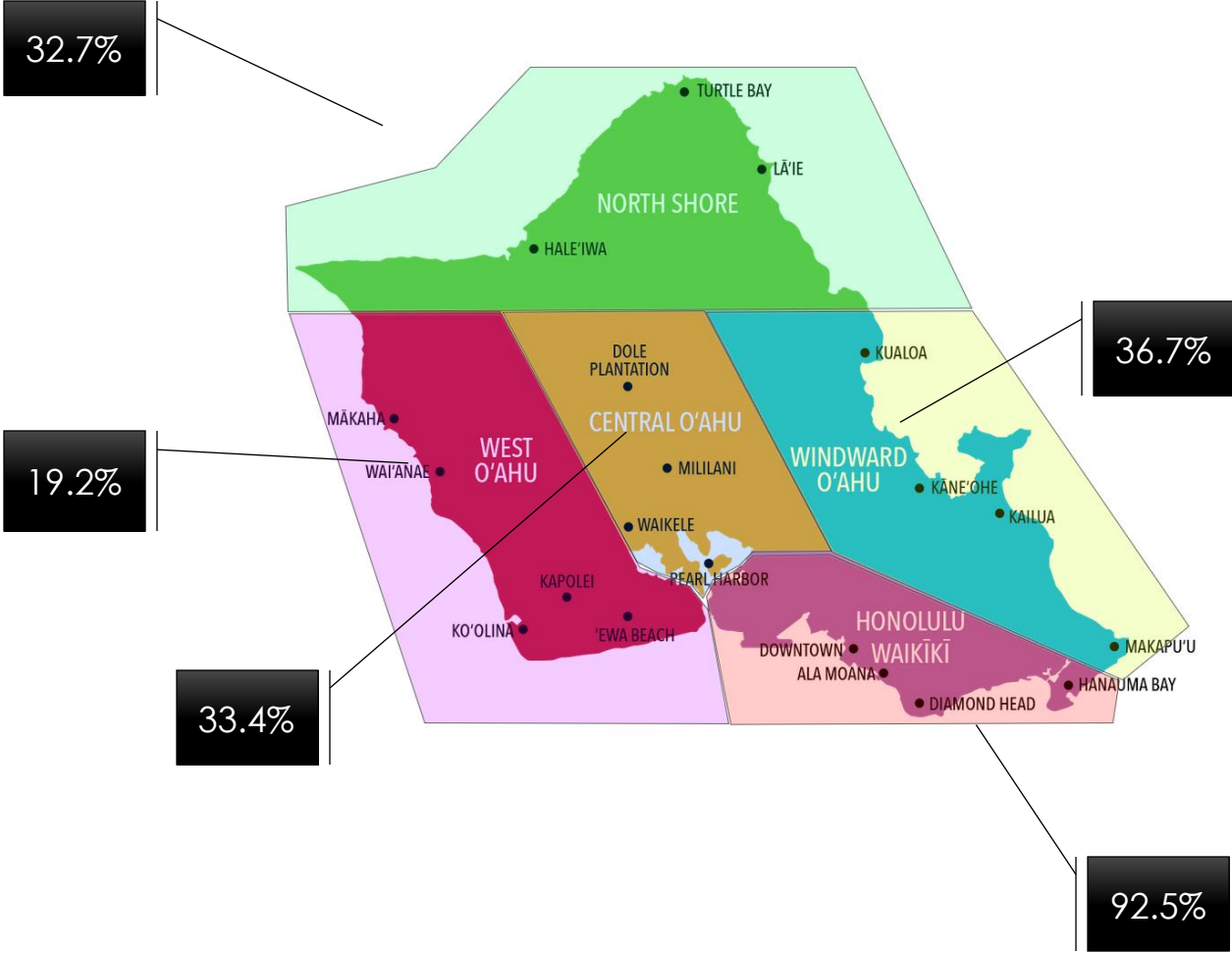
AREAS VISITED O'AHU U.S. WEST



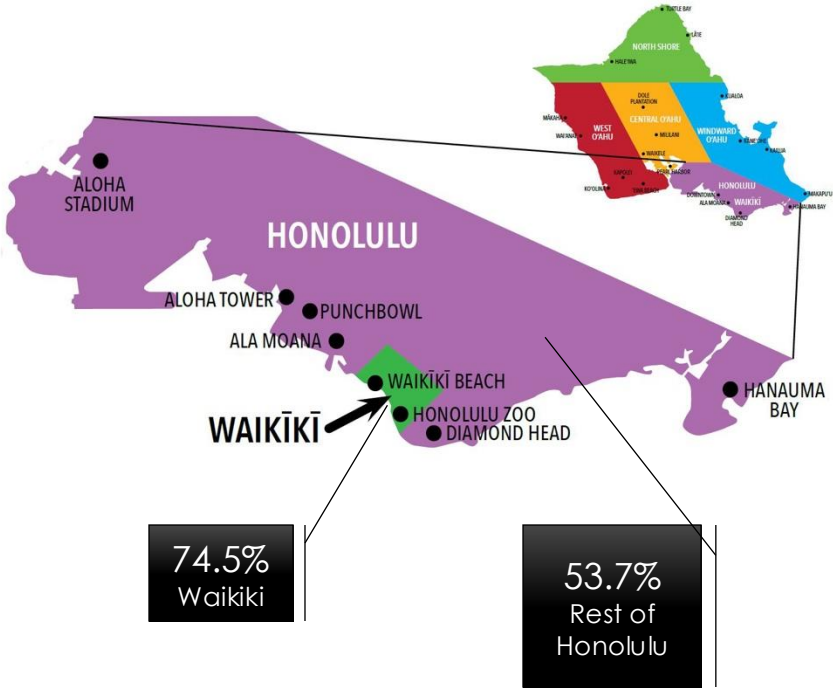
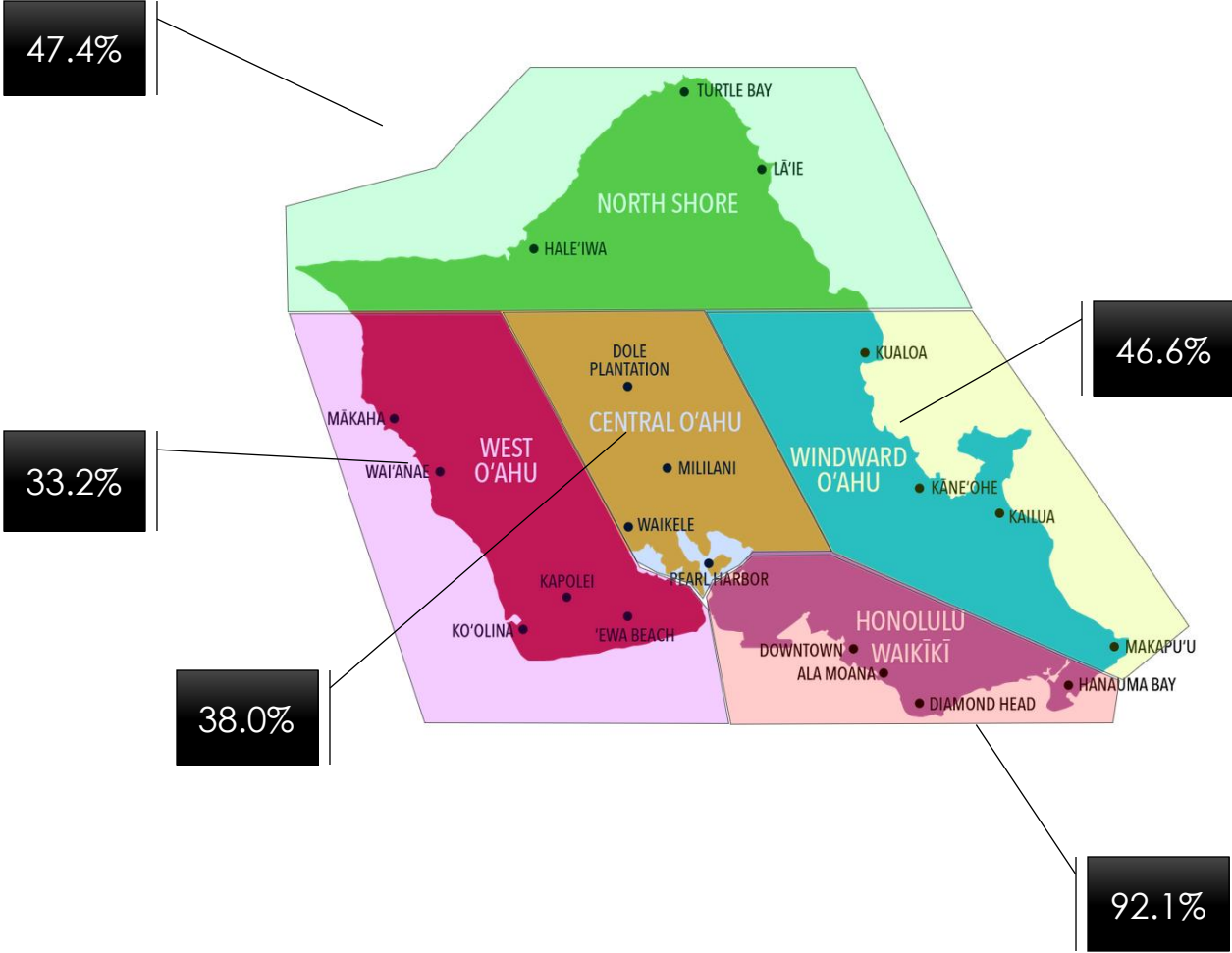
AREAS VISITED O'AHU U.S. EAST



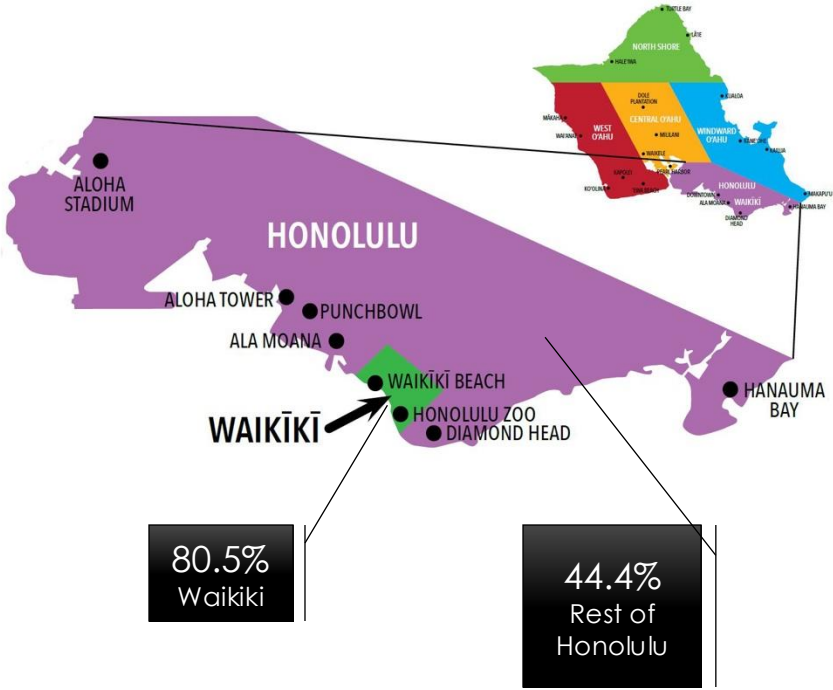
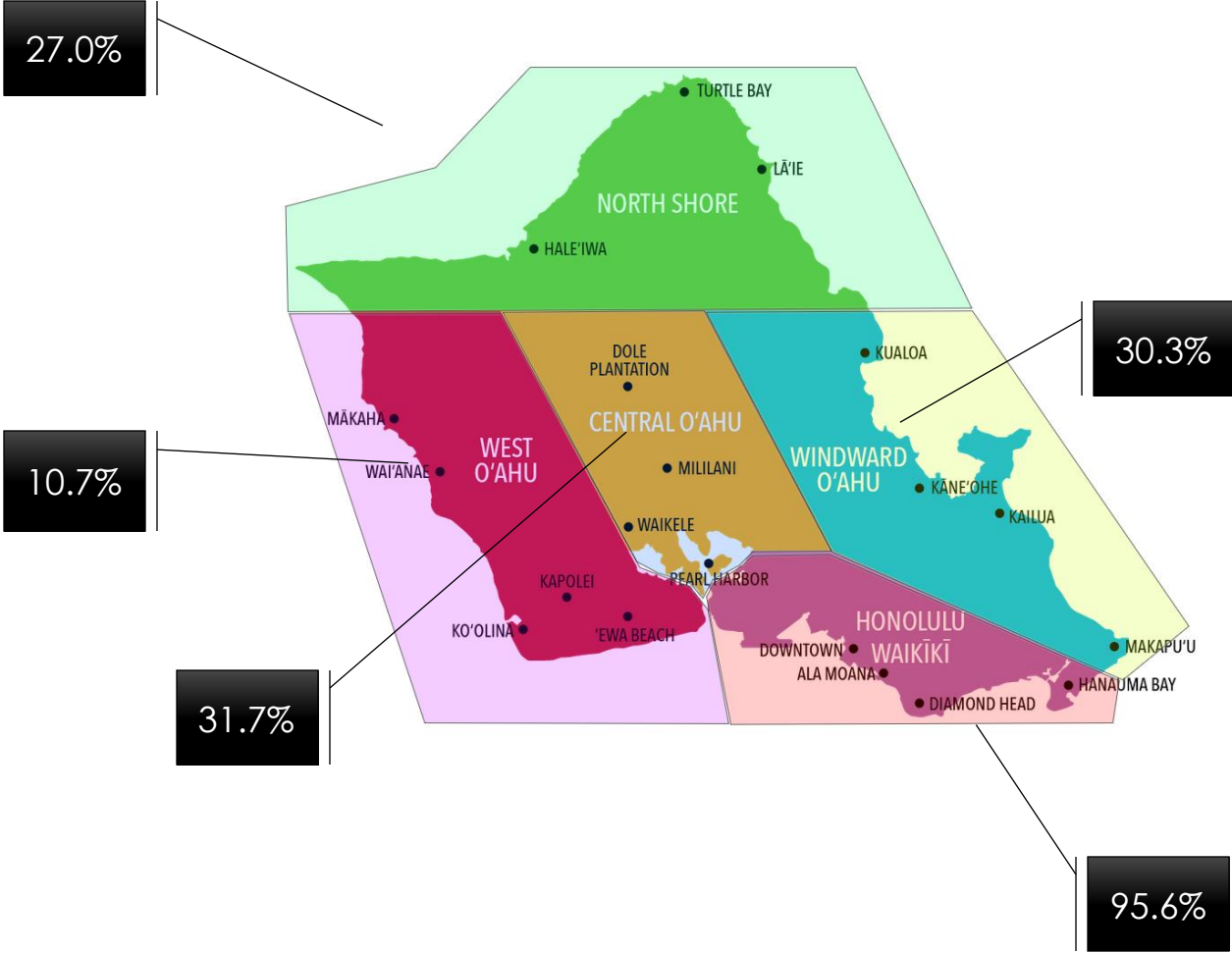
AREAS VISITED O'AHU JAPAN



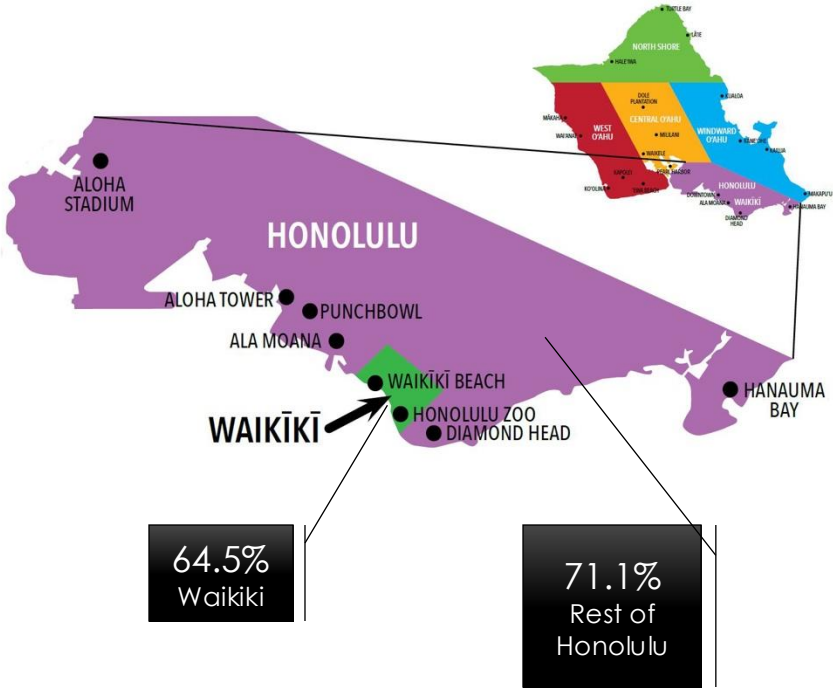
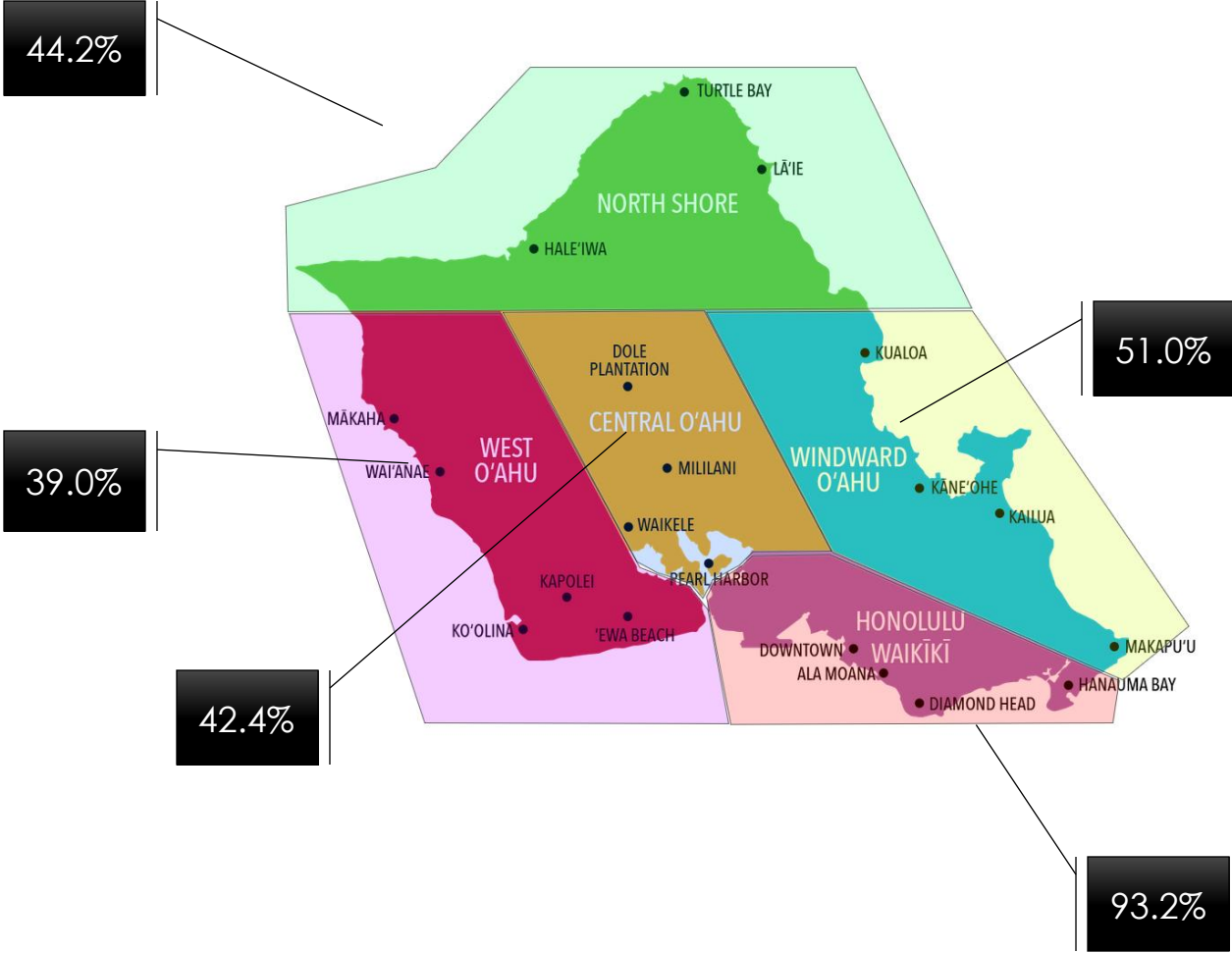
AREAS VISITED O'AHU CANADA



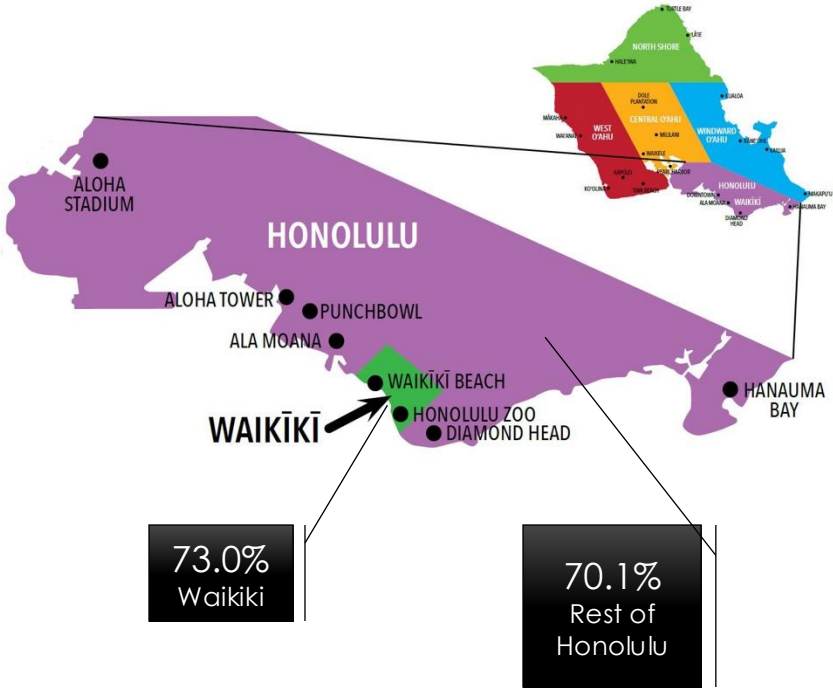
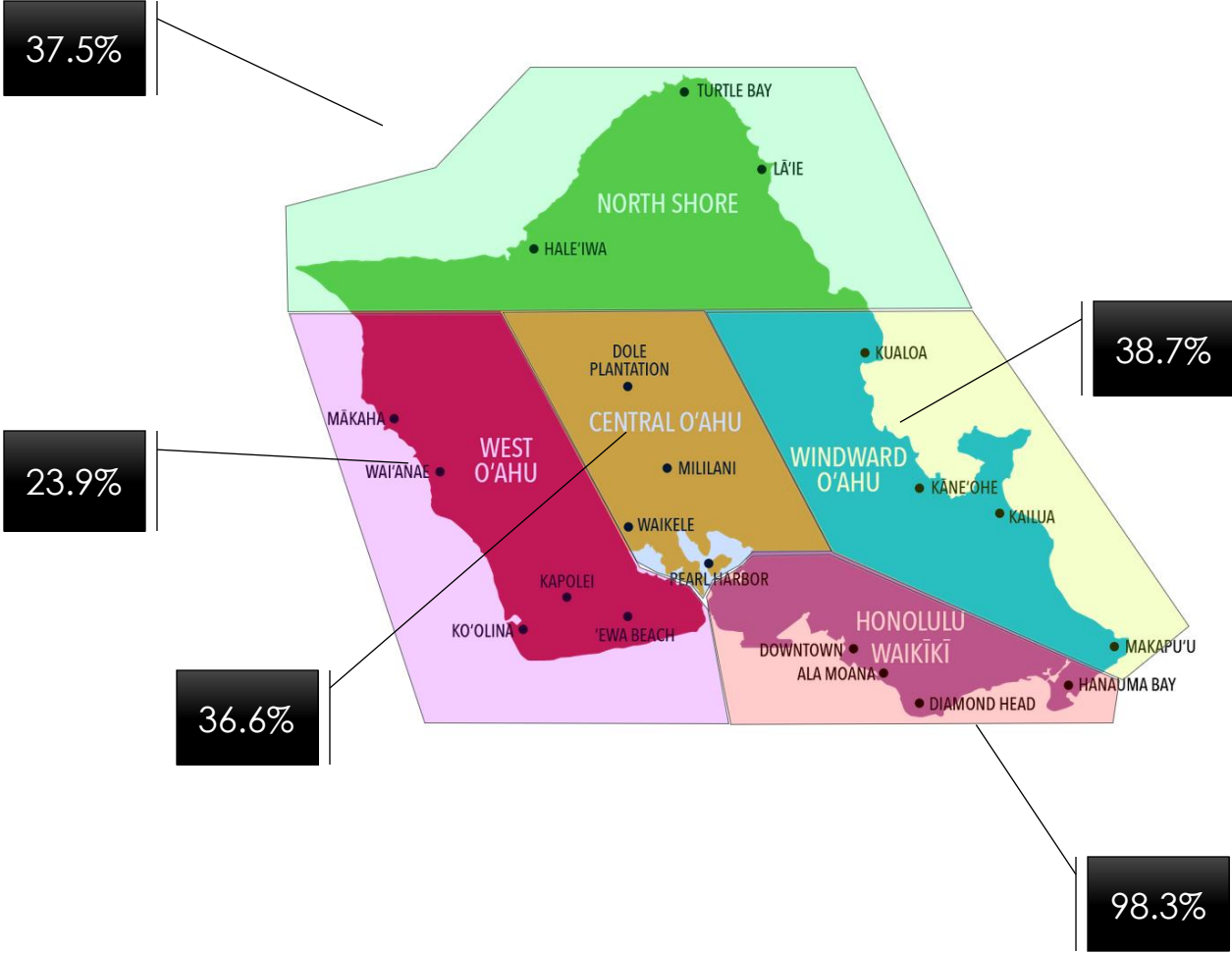
AREAS VISITED O'AHU OCEANIA



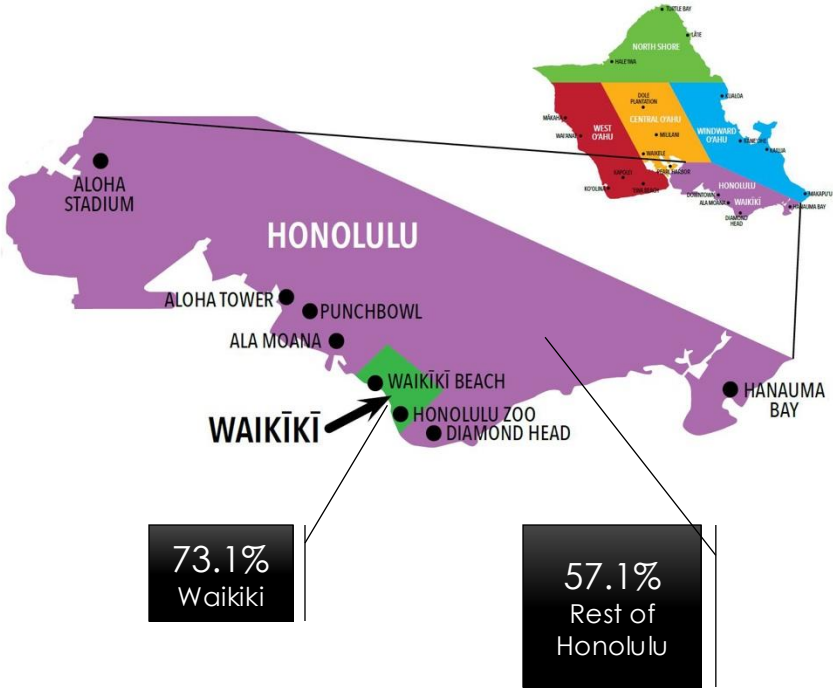
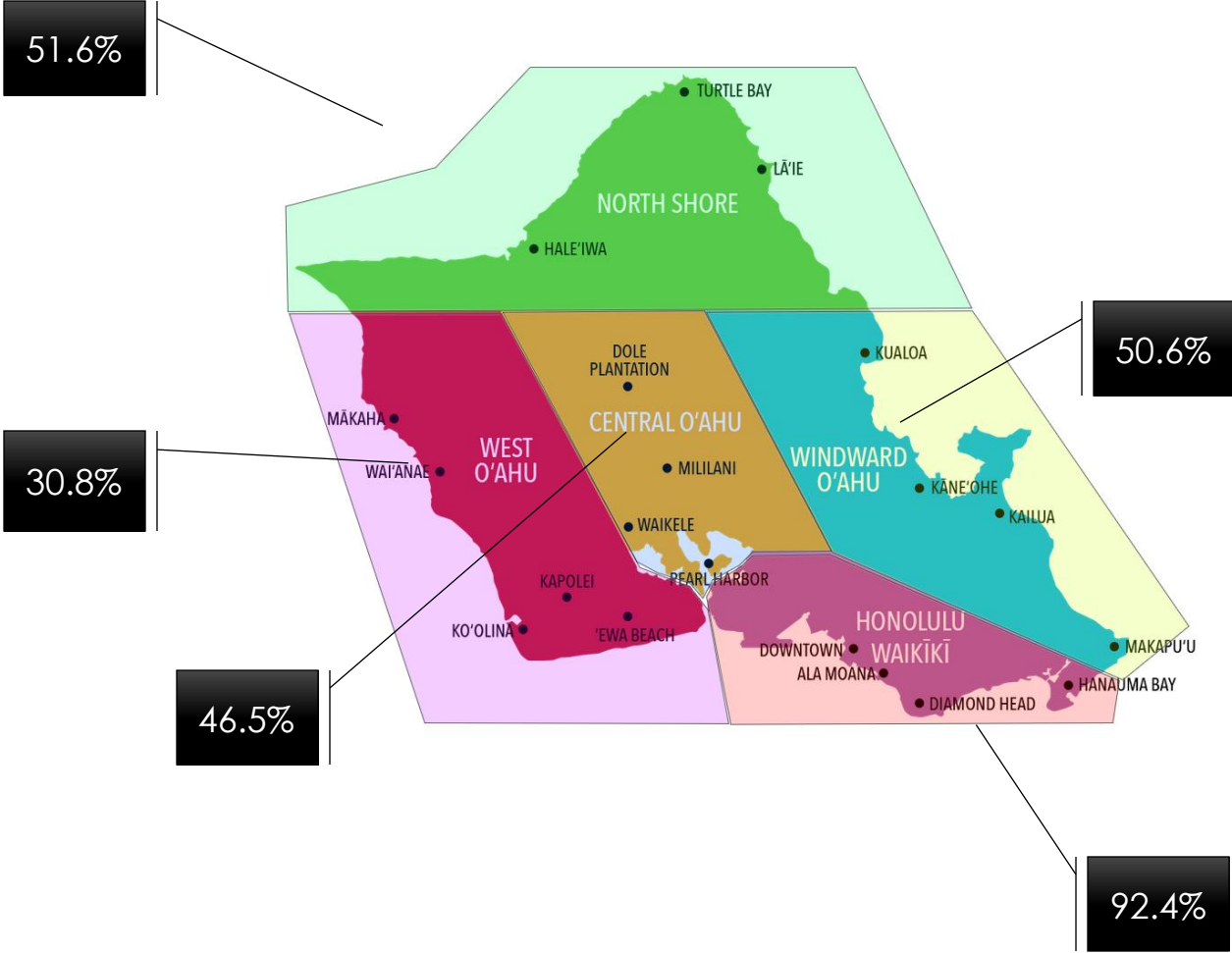
AREAS VISITED O'AHU CHINA



AREAS VISITED O'AHU KOREA



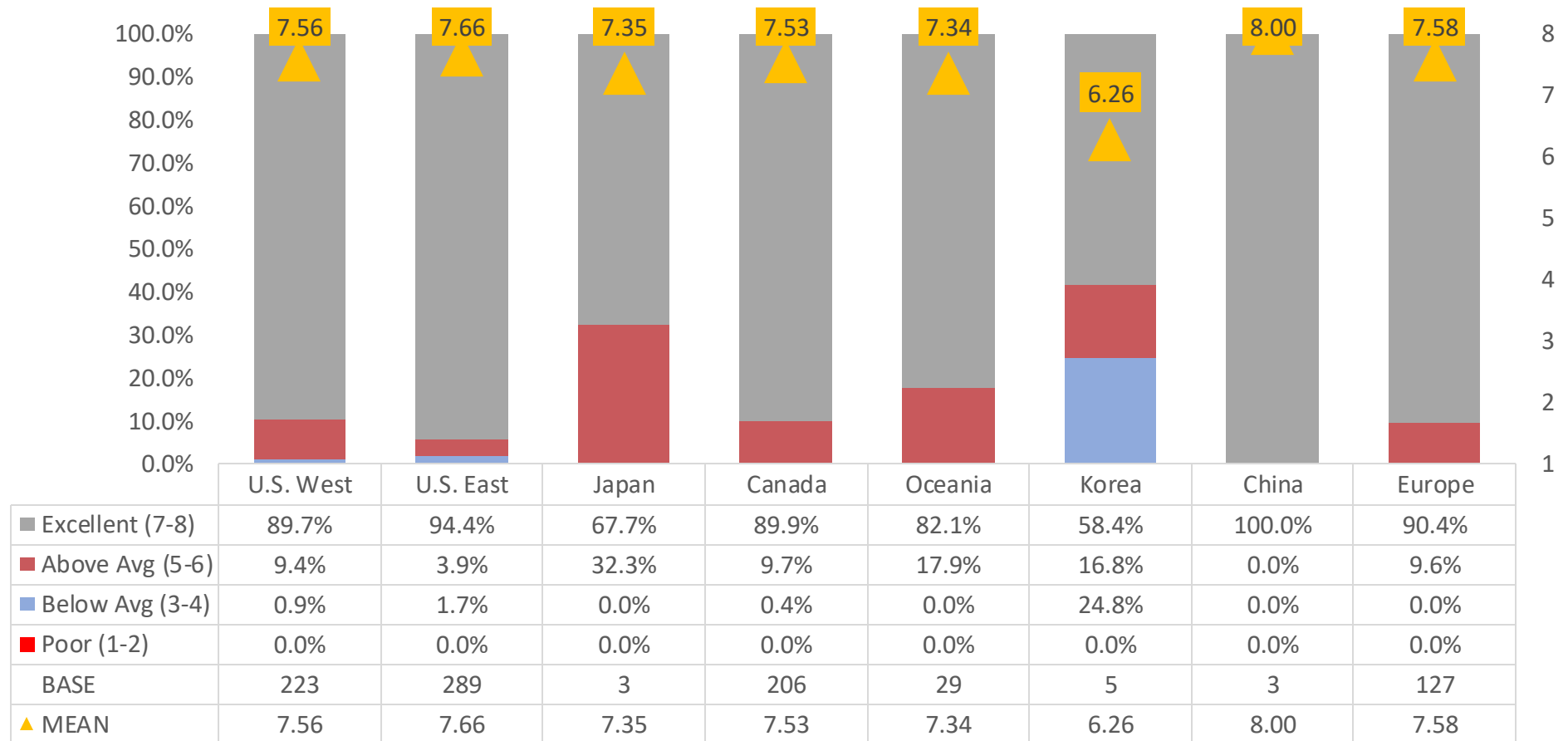
AREAS VISITED O'AHU EUROPE



Section 6 – Kaua‘i

SATISFACTION - KAUA'I

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

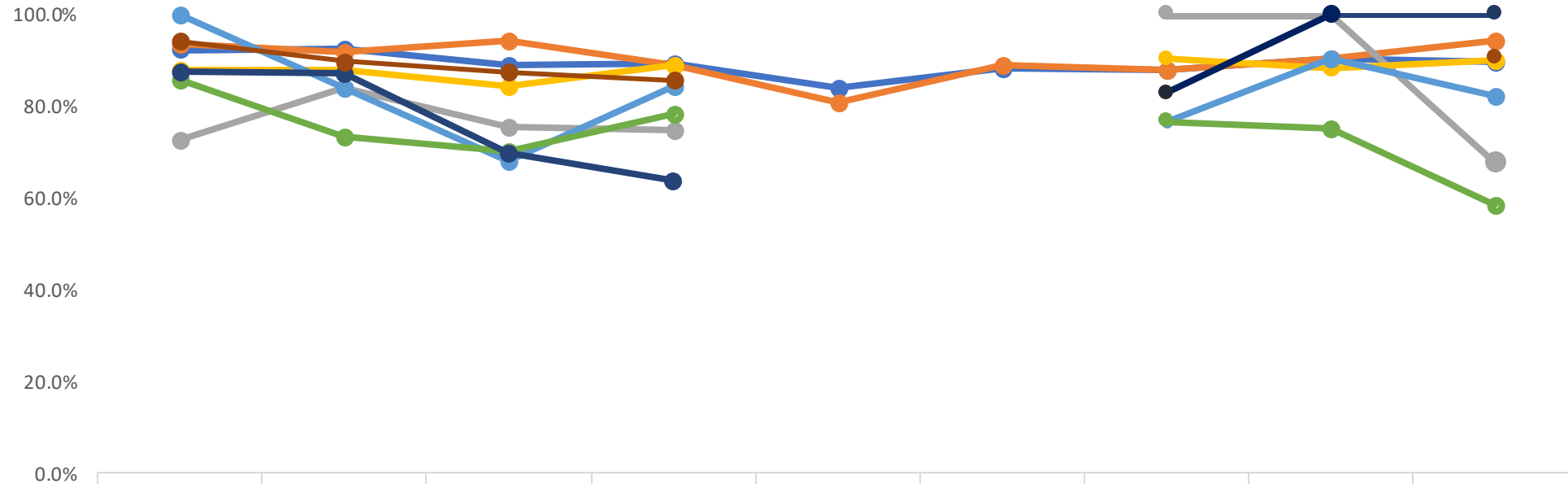


SATISFACTION - KAUA'I

- **Gender:** Male respondents from **U.S. West** expressed higher levels of satisfaction compared to female respondents from this visitor market.
- **Education:** Visitors with a college degree from **U.S. West** and **U.S. East** gave higher satisfaction scores than those without a college degree from these visitor markets.

SATISFACTION - KAUA'I

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



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	92.4%	92.5%	88.8%	89.4%	83.9%	88.4%	88.0%	90.3%	89.7%
U.S. East	93.5%	91.8%	94.2%	88.9%	80.7%	88.8%	88.0%	90.5%	94.4%
Japan	72.5%	84.0%	75.5%	74.9%			100.0%	100.0%	67.7%
Canada	88.0%	88.0%	84.4%	88.8%			90.3%	88.4%	89.9%
Oceania	100.0%	83.9%	68.1%	84.4%			76.5%	90.3%	82.1%
Korea	85.7%	73.4%	70.2%	78.4%			76.6%	75.0%	58.4%
China	87.4%	87.1%	69.8%	63.6%			82.8%	100.0%	100.0%
Europe	94.1%	89.8%	87.5%	85.7%					90.4%

P= Preliminary Data

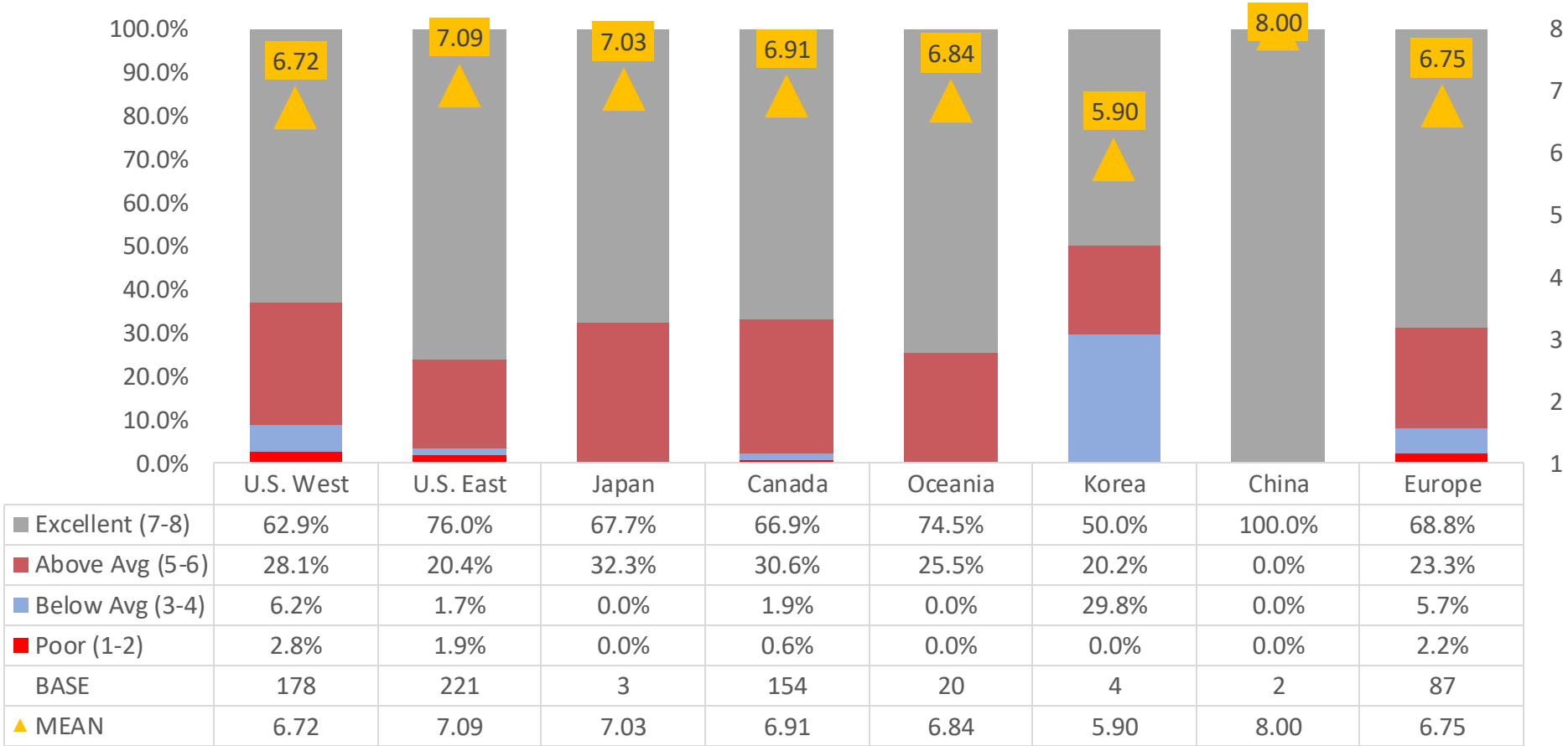
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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. 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.



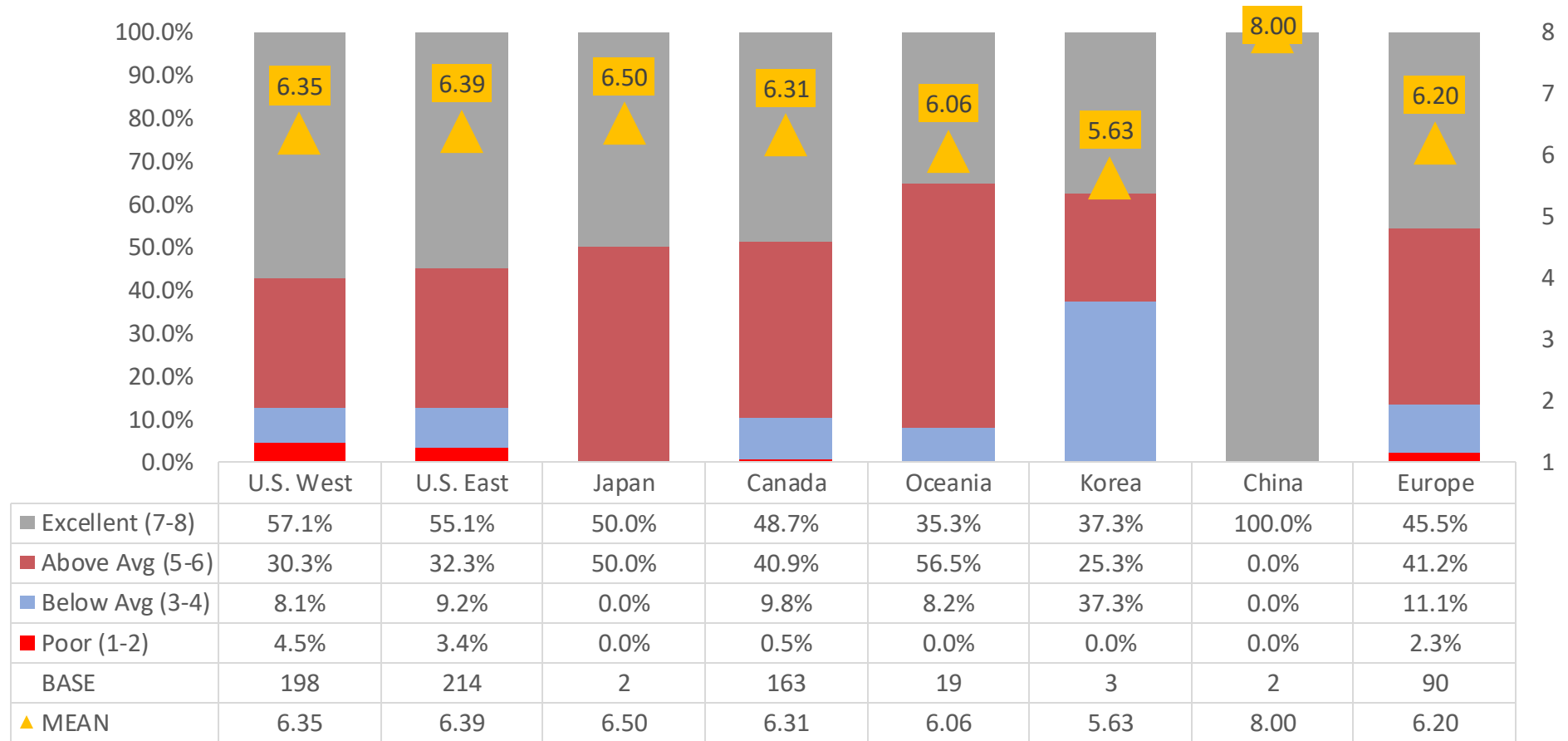
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



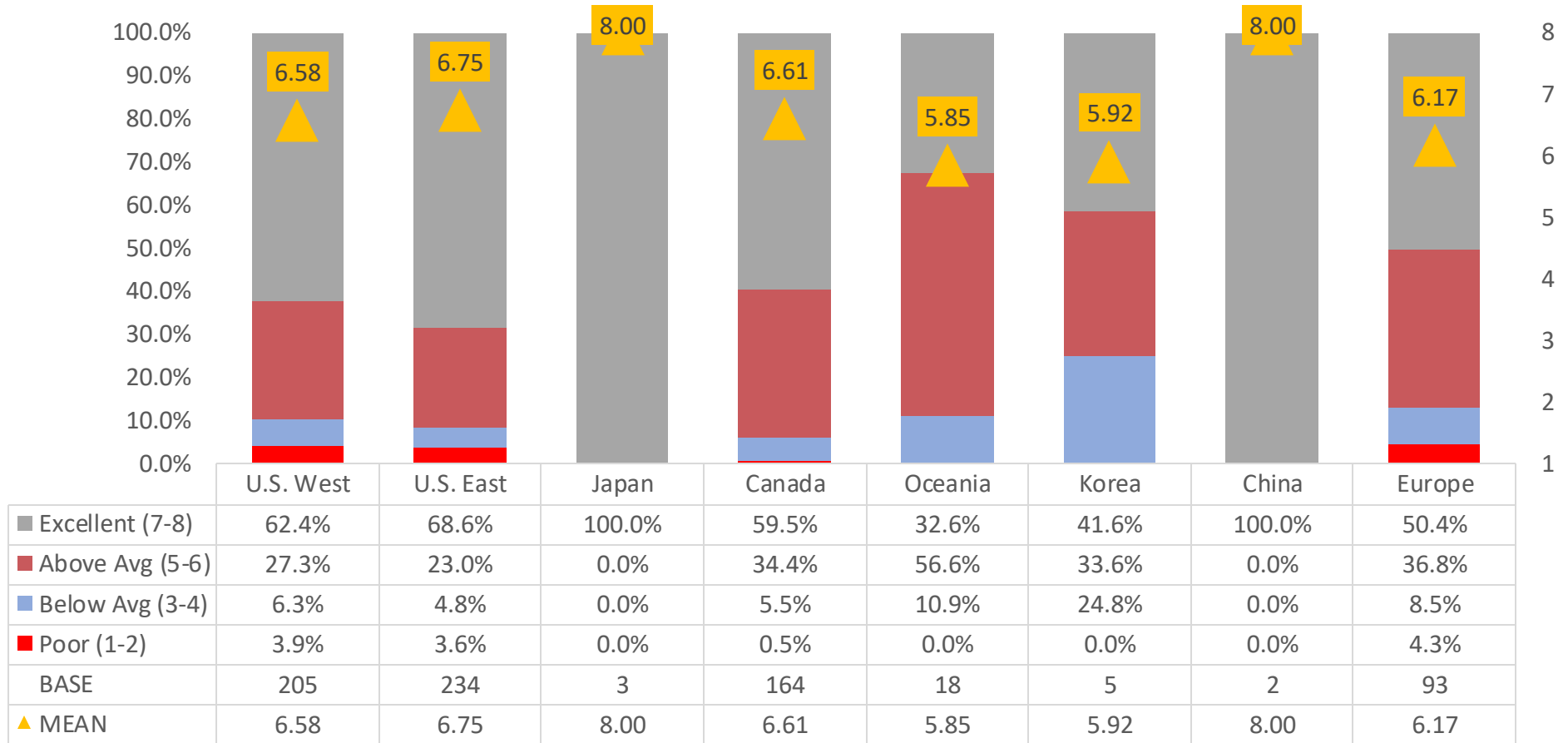
SHOPPING - KAUA'I

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



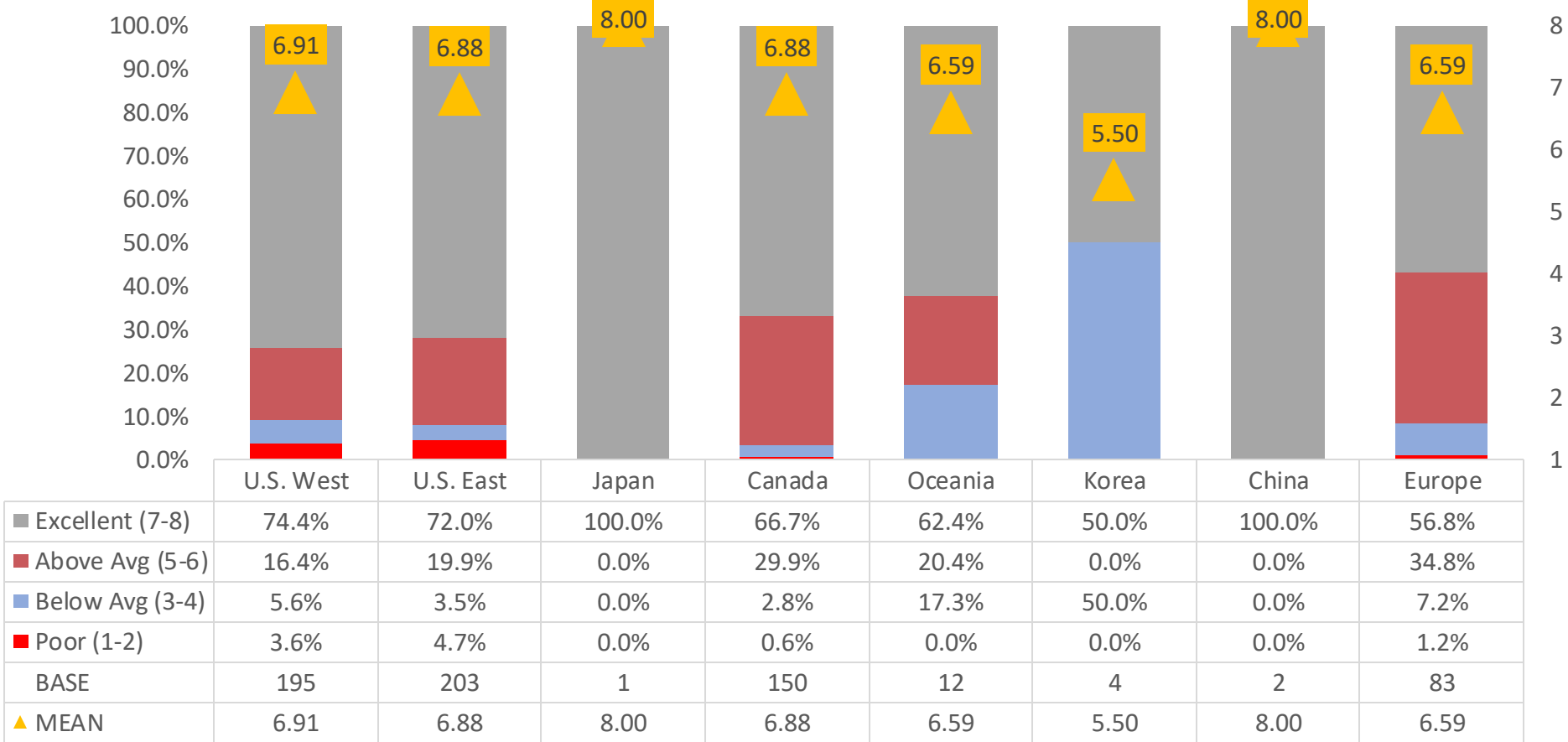
DINING/ FOOD & BEVERAGE - KAUA'I

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



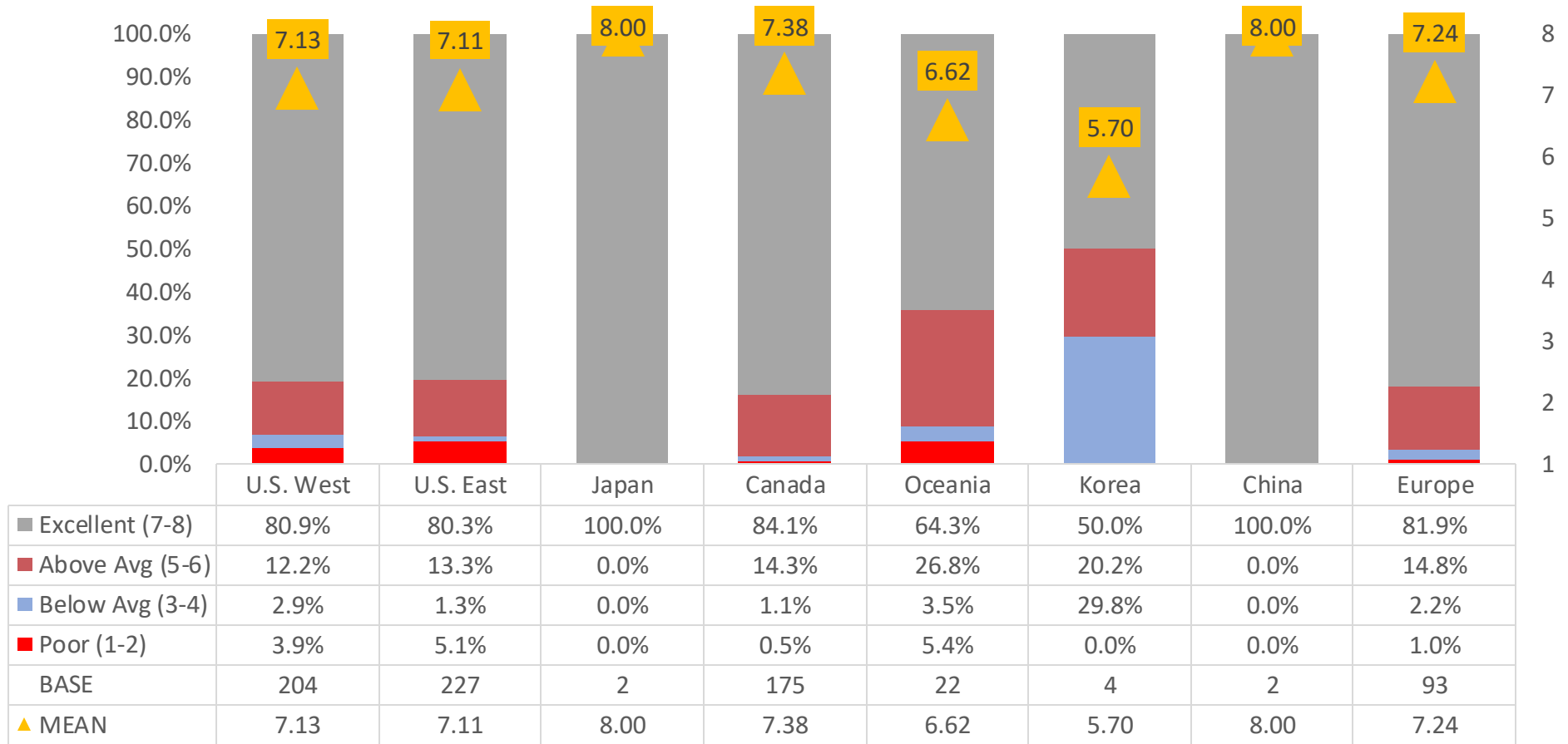
LODGING/ ACCOMMODATIONS - KAUA'I

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



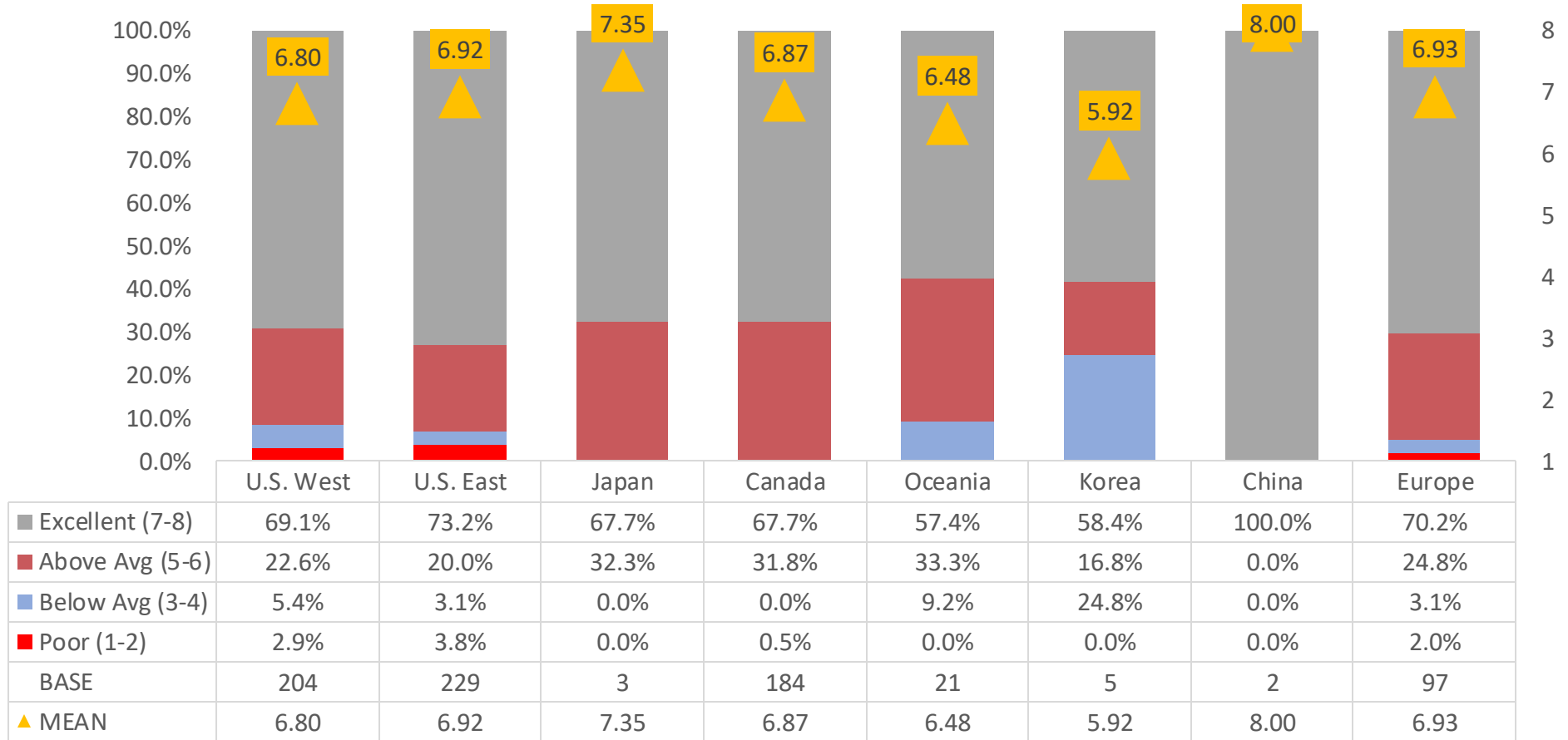
BEACHES - KAUA'I

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



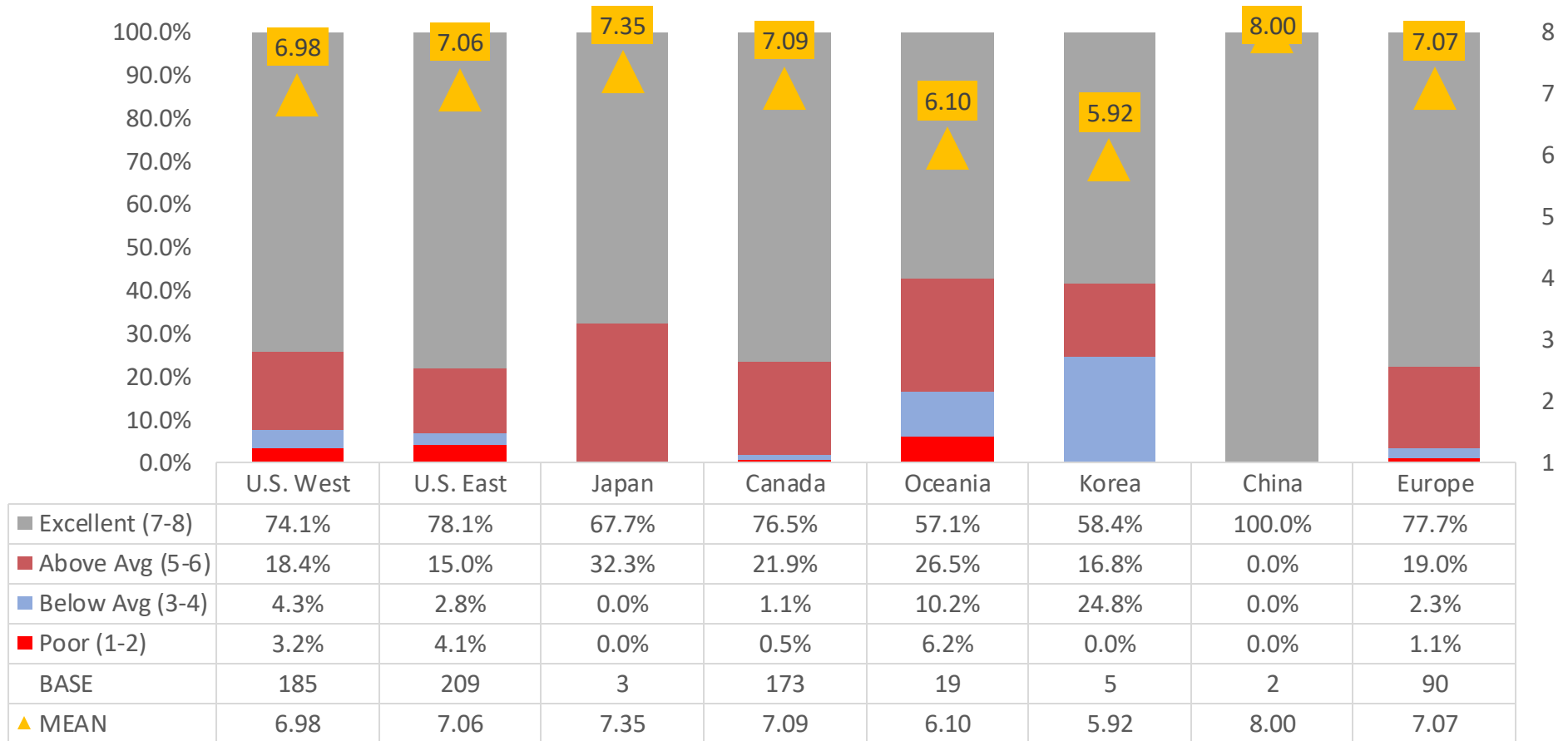
PUBLIC AREAS - KAUA'I

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



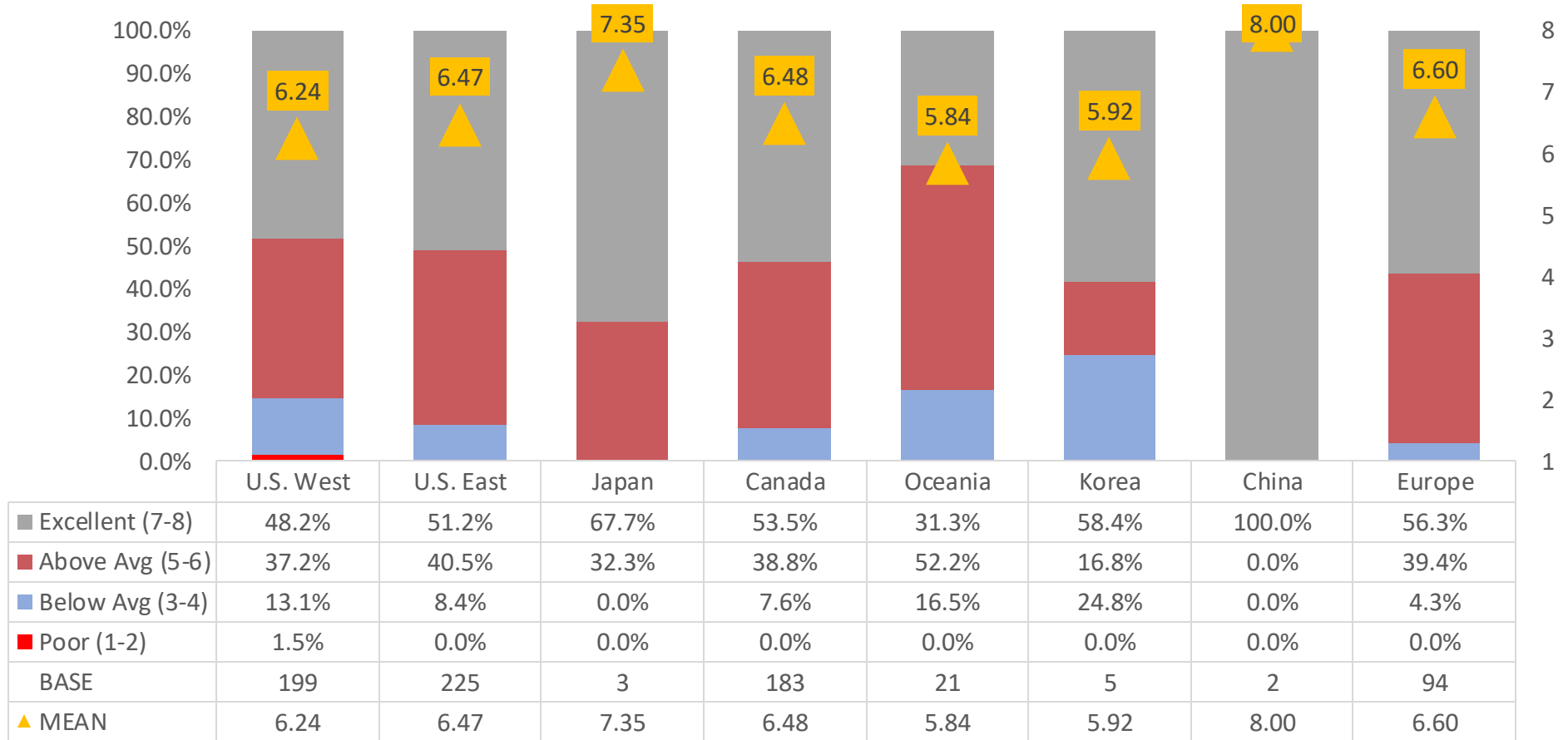
PARKS - KAUA'I

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



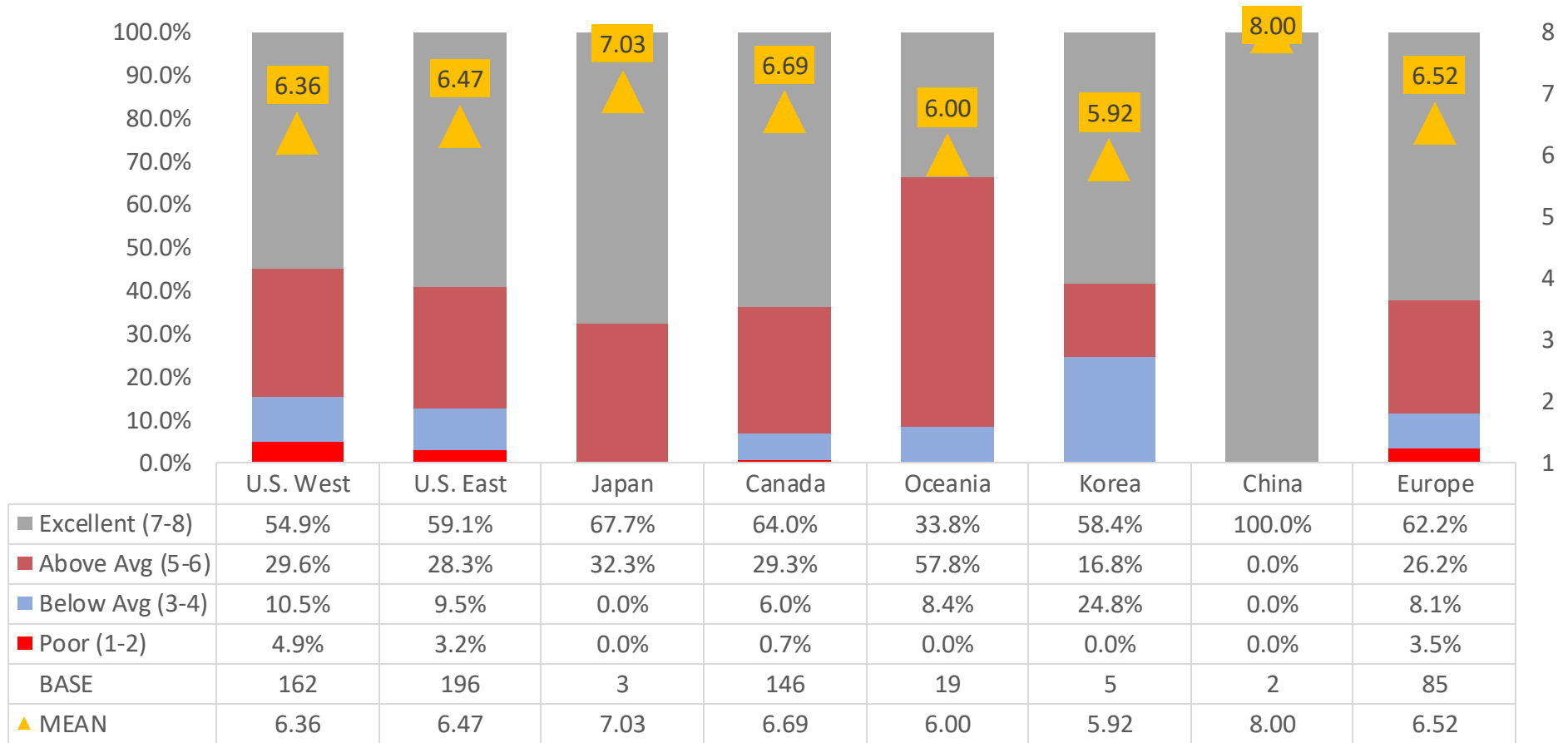
ROADS - KAUA'I

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



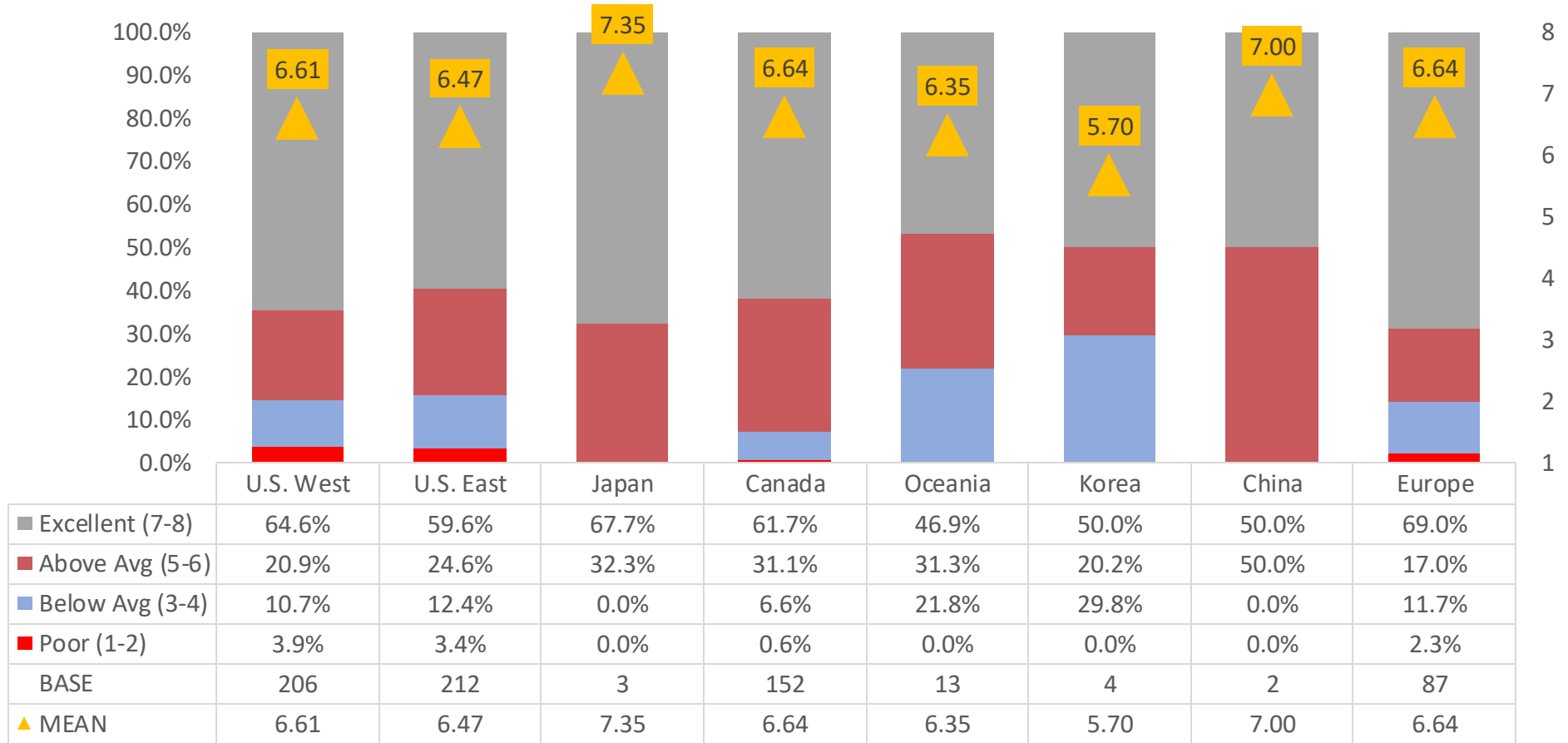
TRANSPORTATION ON ISLAND - KAUA'I

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



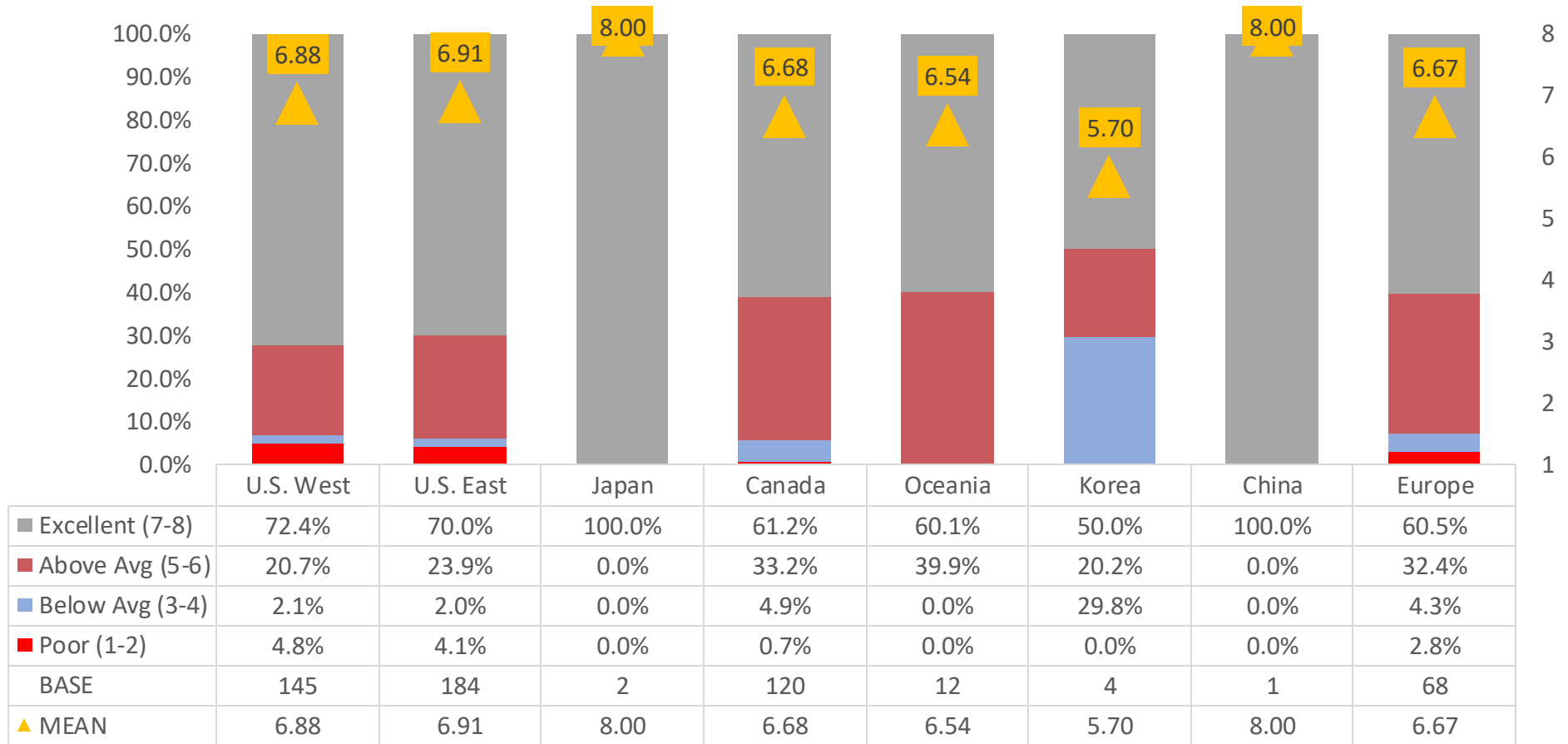
AIRPORT- KAUA'I

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



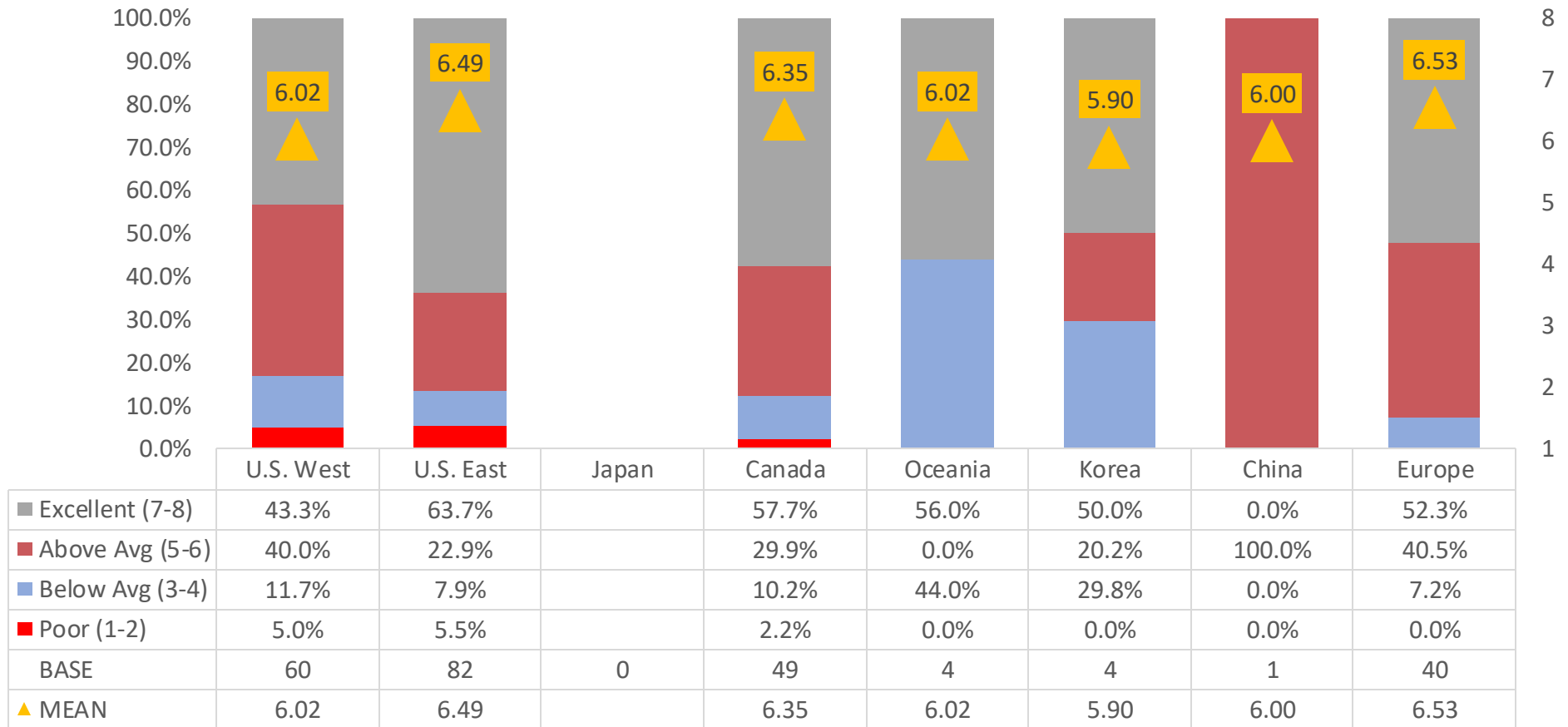
CULTURAL ACTIVITIES - KAUA'I

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



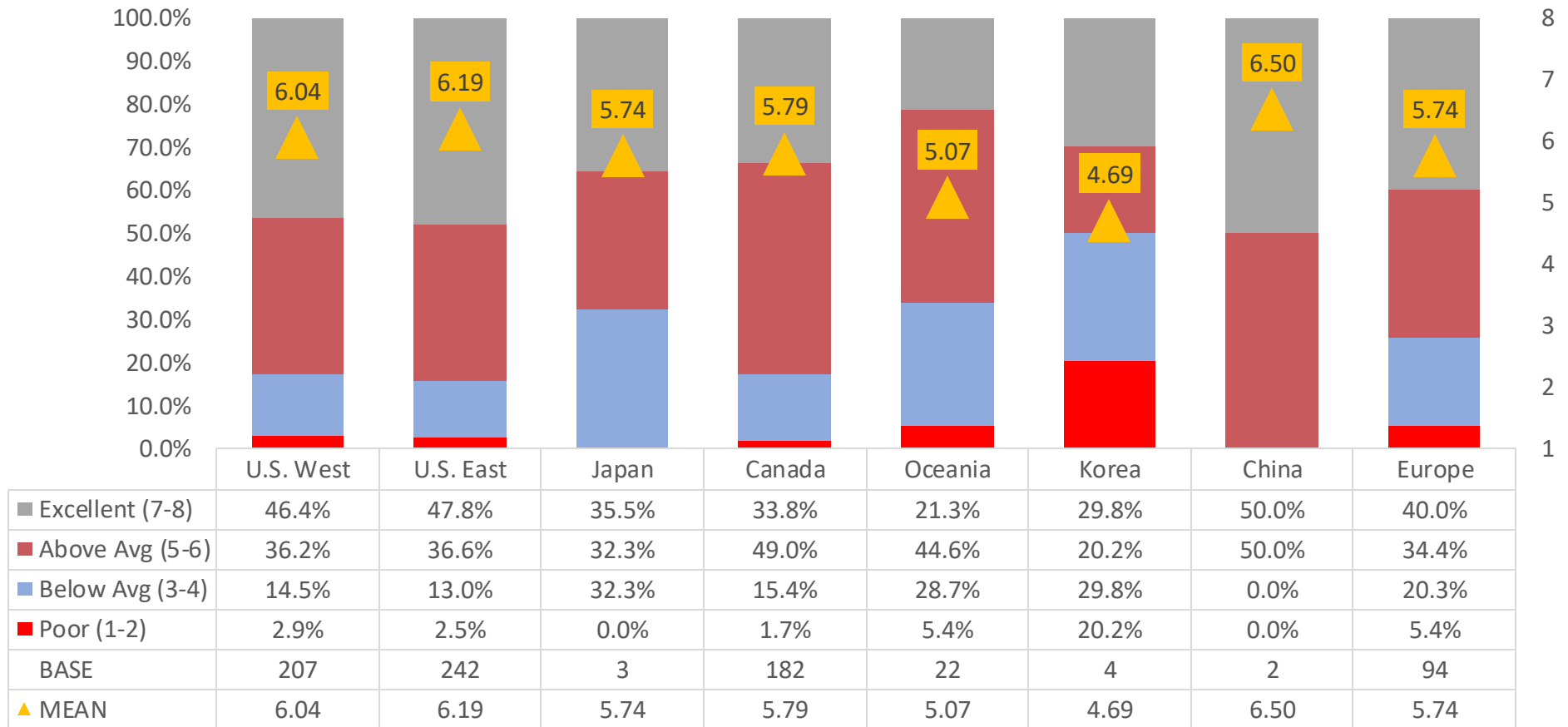
VOLUNTEER ACTIVITIES - KAUA'I

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



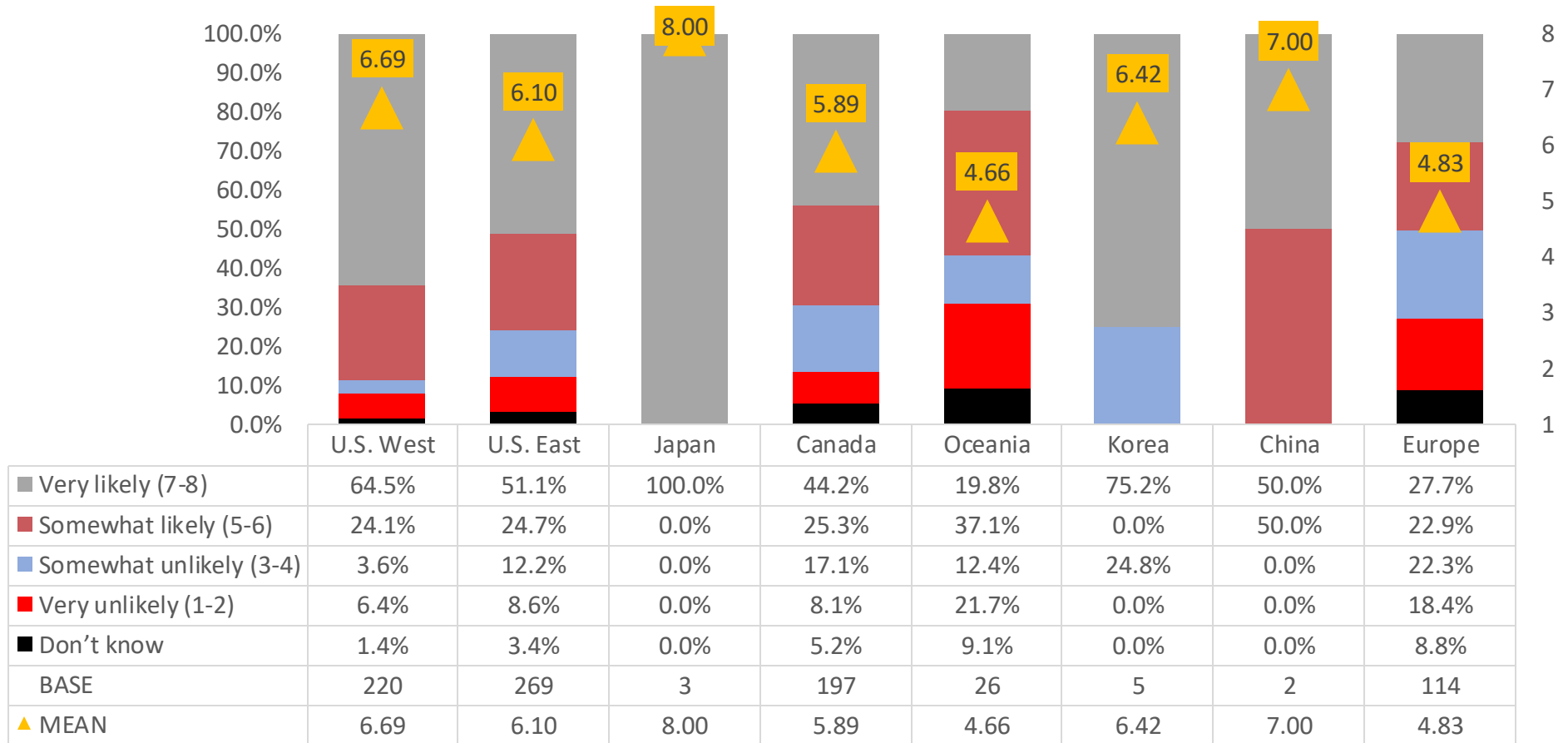
VALUE FOR THE MONEY- KAUA'I

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



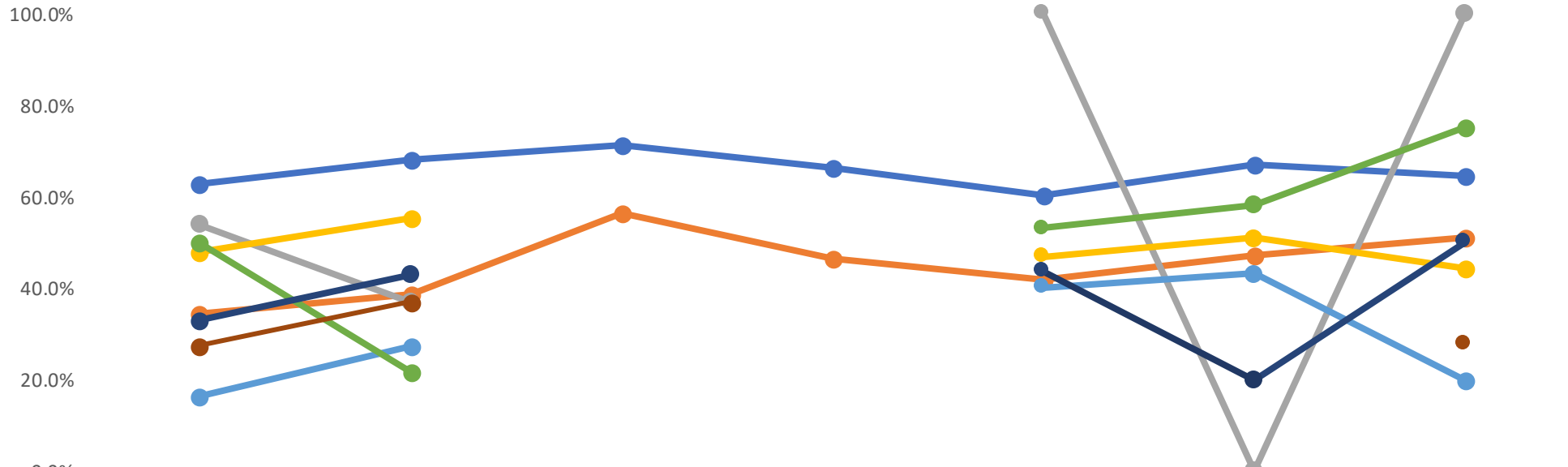
LIKELIHOOD OF RETURN VISIT - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	62.9%	68.2%	71.4%	66.3%	60.3%	67.0%	64.5%
U.S. East	34.4%	38.6%	56.5%	46.4%	41.7%	47.0%	51.1%
Japan	54.0%	36.9%			100.0%	0.0%	100.0%
Canada	48.0%	55.2%			46.8%	50.9%	44.2%
Oceania	16.2%	27.2%			40.1%	43.1%	19.8%
Korea	50.0%	21.7%			53.1%	58.3%	75.2%
China	32.9%	42.9%			43.7%	20.0%	50.0%
Europe	27.4%	36.9%					27.7%

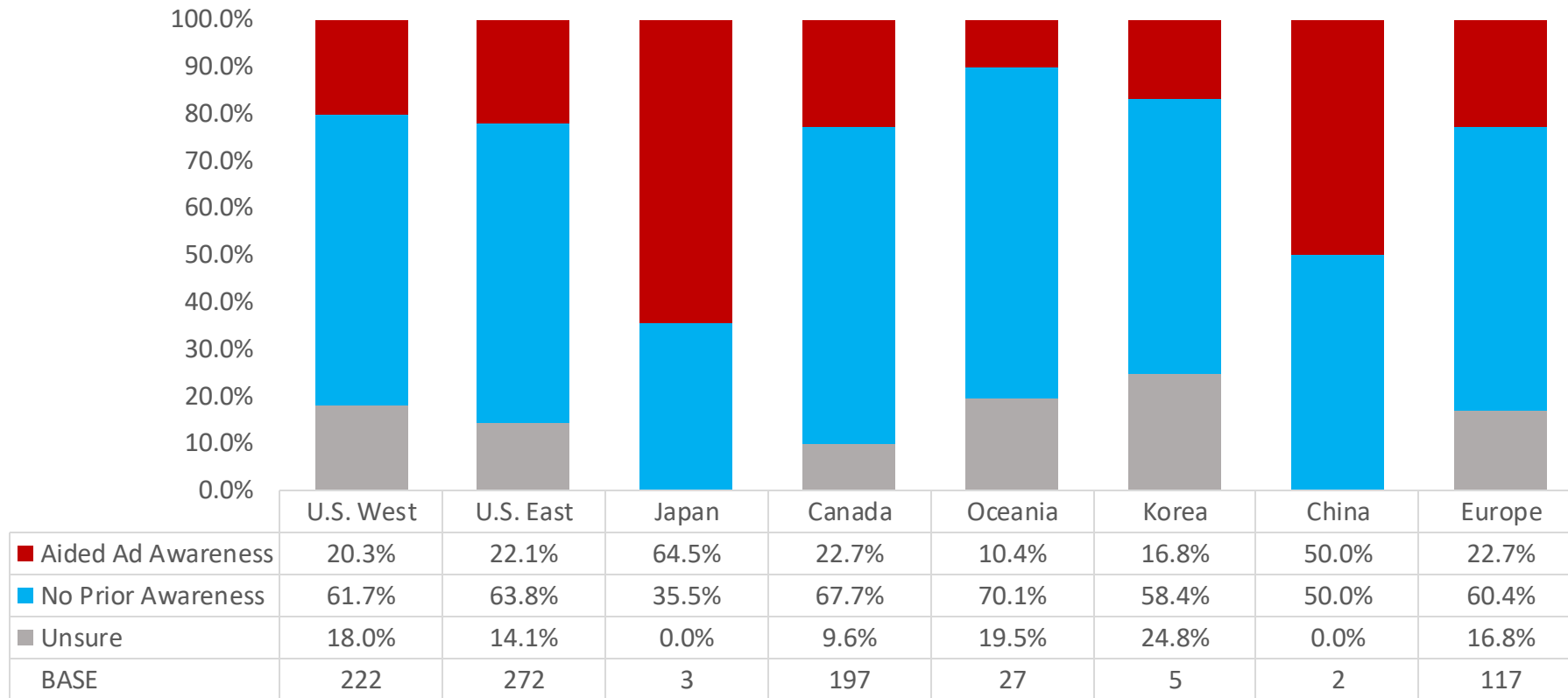
P= Preliminary Data

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

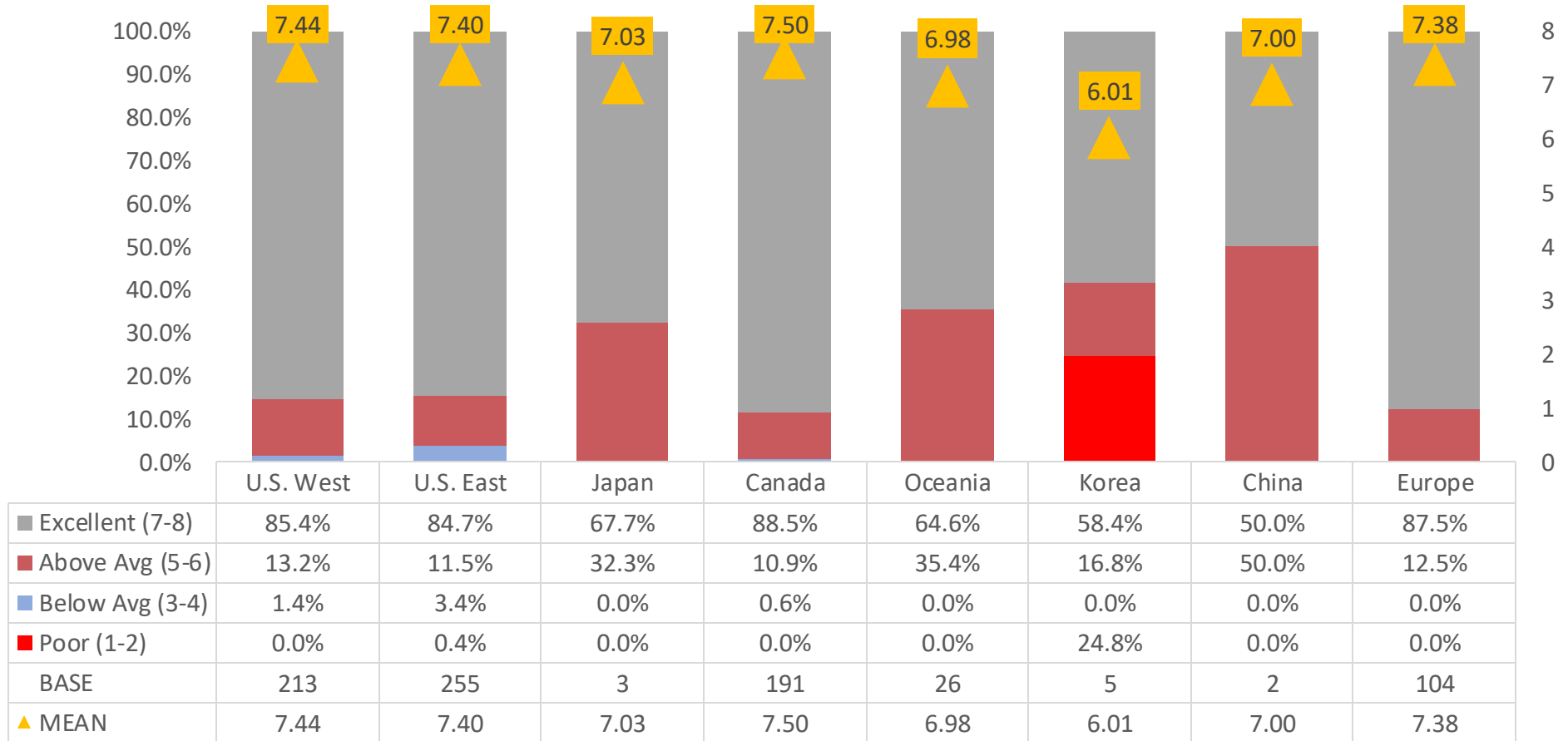


MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	42.8%	44.2%	64.5%	48.4%	26.9%	0.0%	0.0%	58.0%
Outdoor or sporting activities and events	17.6%	13.5%	0.0%	14.2%	13.3%	50.0%	0.0%	13.8%
Social media posts and videos	7.7%	8.5%	0.0%	10.5%	13.6%	0.0%	16.8%	16.2%
Hawaiian cultural events	8.6%	7.0%	0.0%	8.2%	13.3%	0.0%	0.0%	9.4%
Television programs or movies filmed in Hawai'i	3.6%	5.8%	0.0%	6.5%	0.0%	0.0%	16.8%	14.8%
Hawaiian music	5.0%	2.6%	0.0%	5.5%	4.5%	50.0%	0.0%	1.7%
BASE	222	271	3	197	27	2	5	117

FRIENDLINESS OF KAUA‘I RESIDENTS

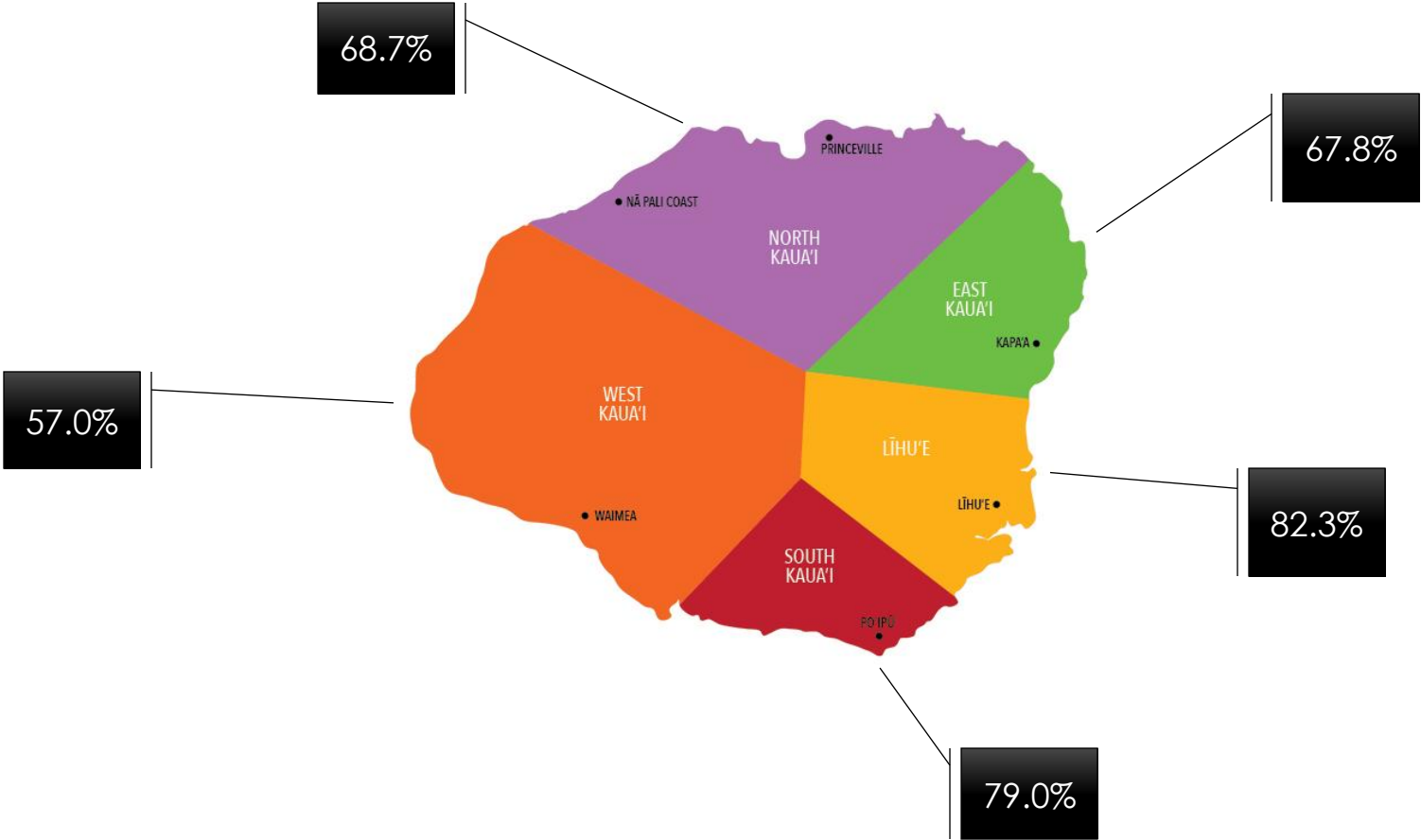
8-pt Rating Scale
8=Excellent / 1=Poor



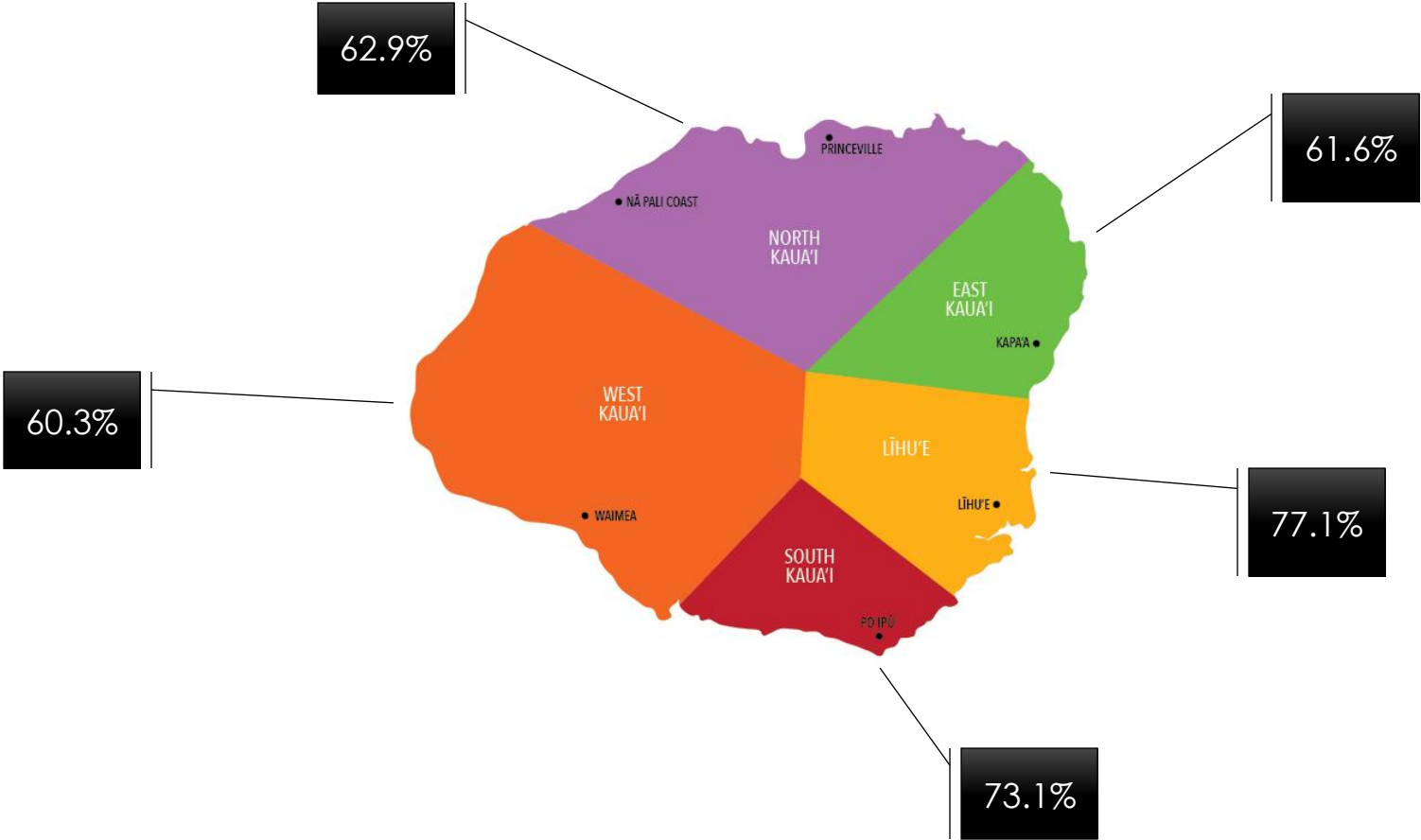
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	43.2%	26.6%	0.0%	28.7%	9.1%	0.0%	0.0%	14.9%
Friend recommendation	23.9%	24.3%	35.5%	27.1%	17.0%	50.0%	24.8%	24.7%
Cruise line stop/part of tour	1.4%	12.8%	0.0%	16.3%	50.8%	0.0%	0.0%	10.0%
Visiting Family/ Friends	7.1%	5.9%	32.3%	1.1%	0.0%	0.0%	0.0%	2.1%
Attending Conference/ Event	4.3%	2.1%	0.0%	3.7%	0.0%	0.0%	24.8%	4.0%
Social Media Post	2.9%	3.4%	0.0%	1.5%	3.0%	50.0%	0.0%	3.0%
Article/ Blog	1.9%	3.5%	32.3%	2.5%	9.3%	0.0%	0.0%	12.8%
Location/ Never been, but went to other islands	2.9%	2.8%	0.0%	2.2%	0.0%	0.0%	0.0%	3.0%
Travel Agent	1.4%	3.4%	0.0%	2.5%	4.7%	0.0%	33.6%	13.5%

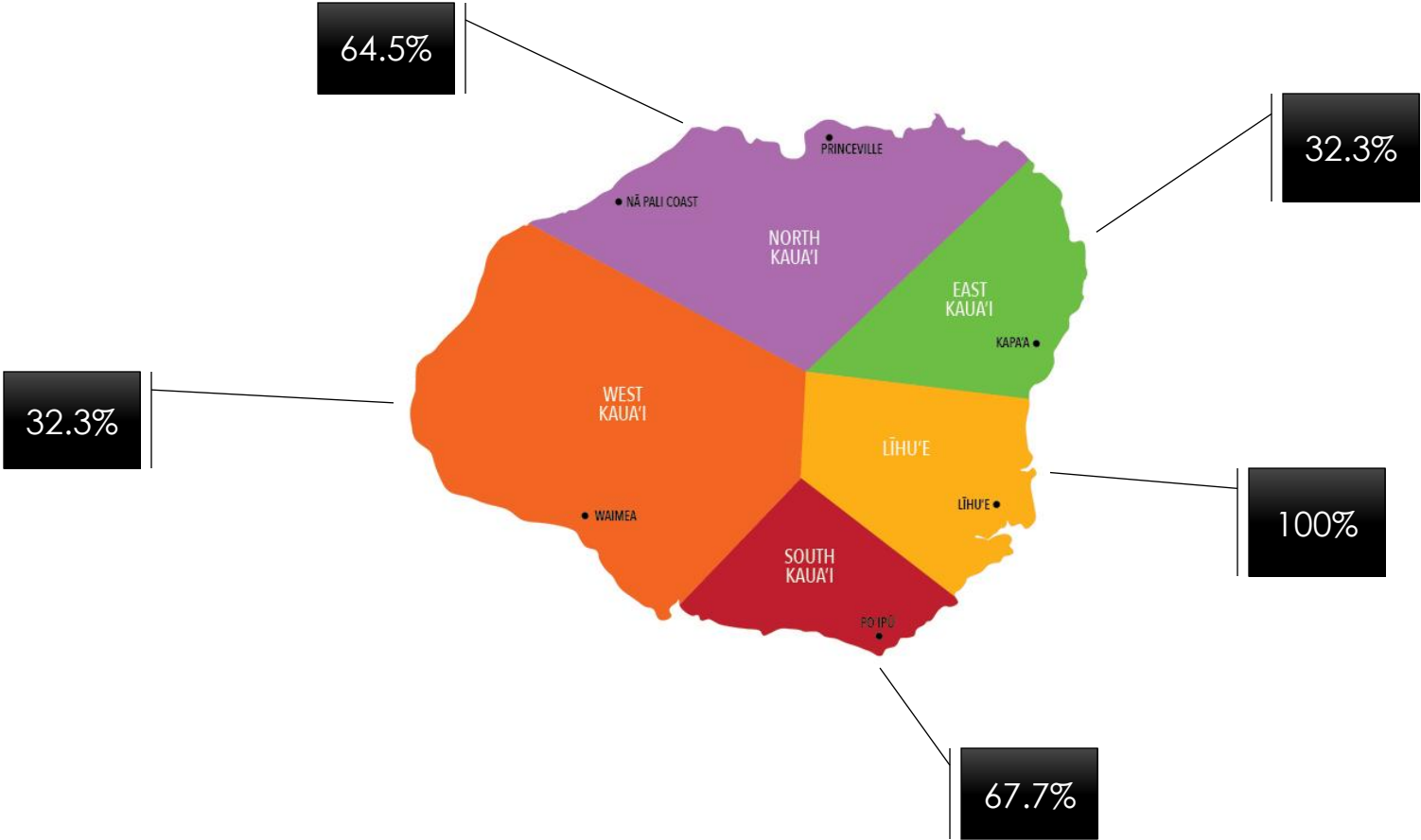
AREAS VISITED KAUA'I U.S. WEST



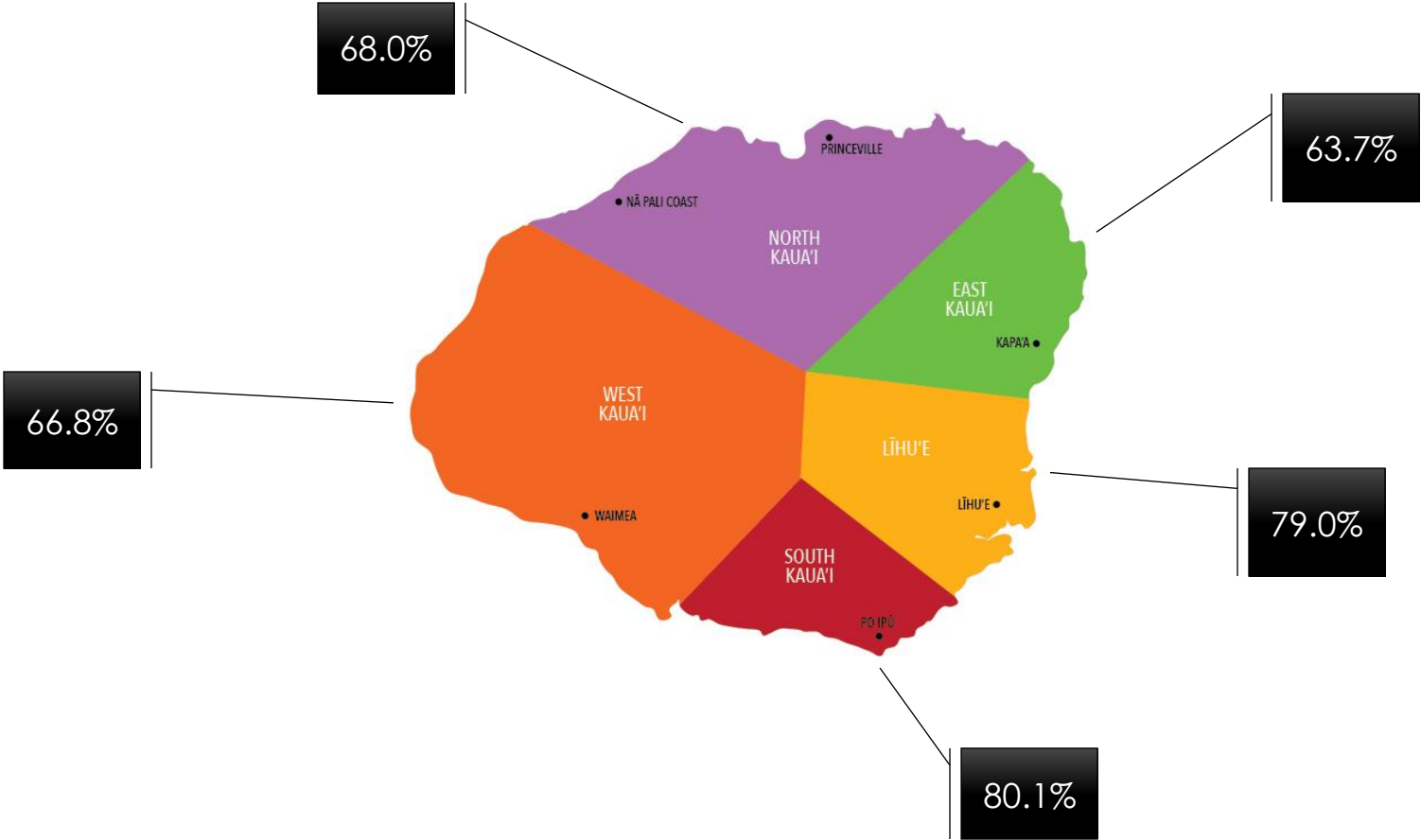
AREAS VISITED KAUA'I U.S. EAST



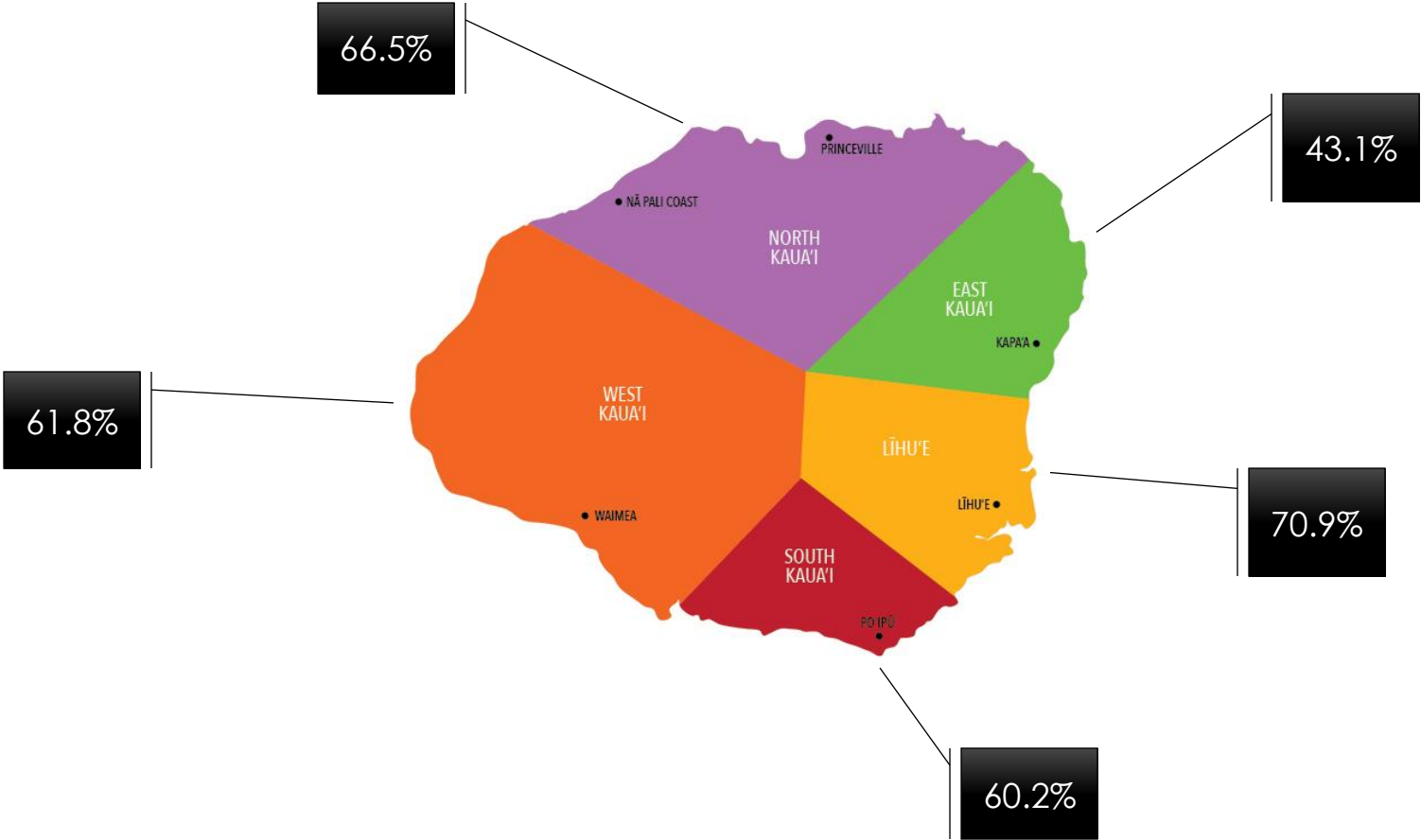
AREAS VISITED KAUA'I JAPAN



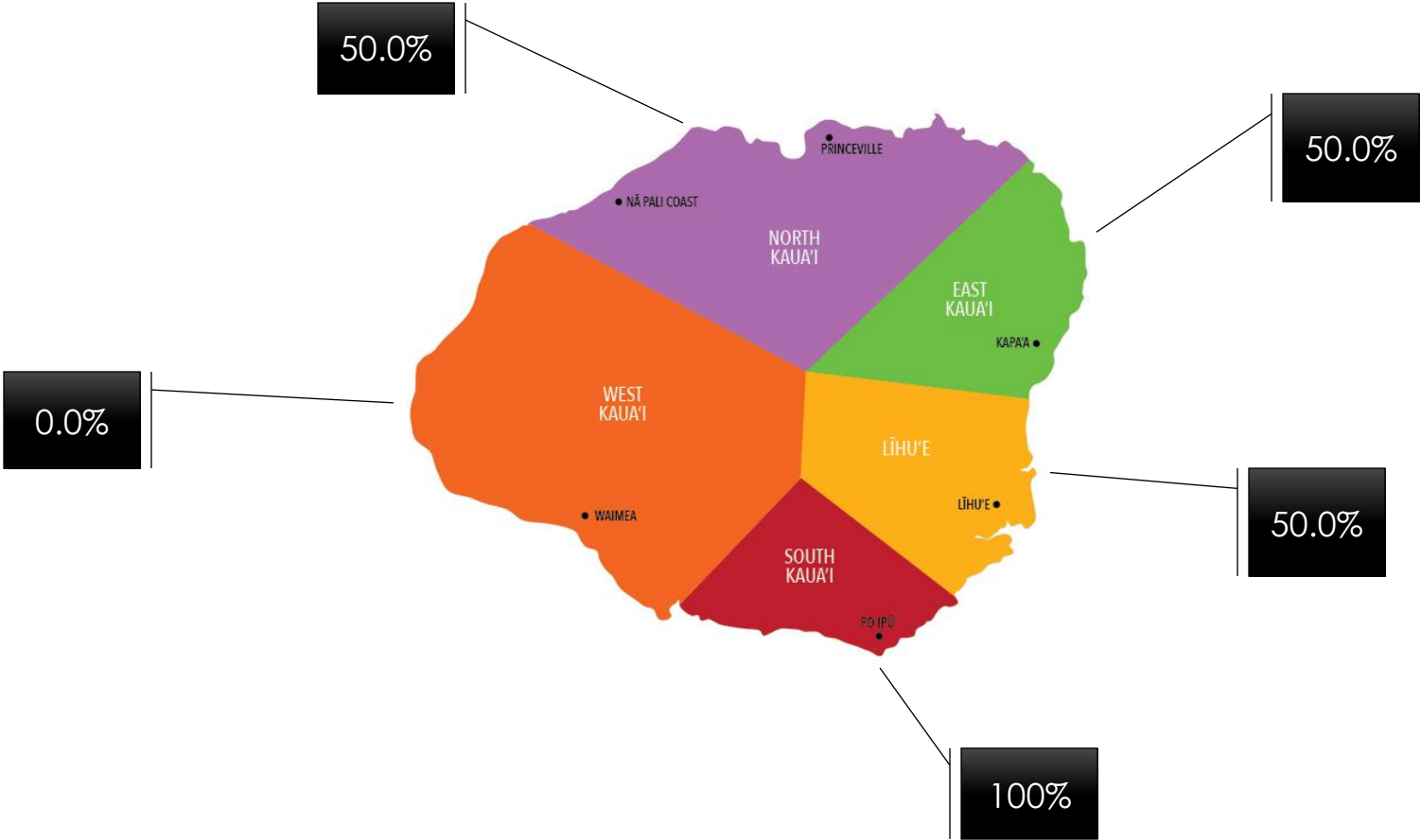
AREAS VISITED KAUA'I CANADA



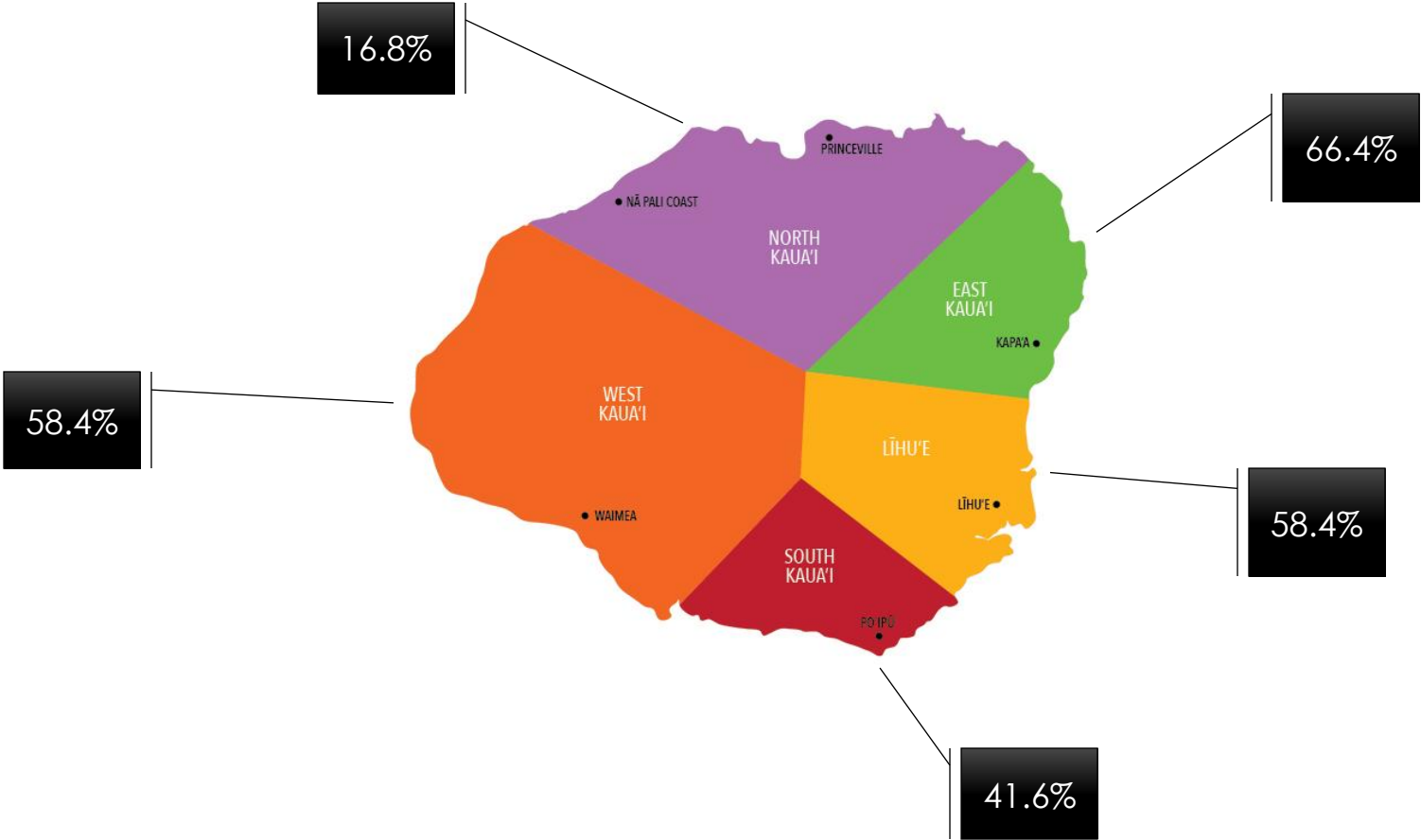
AREAS VISITED KAUA'I OCEANIA



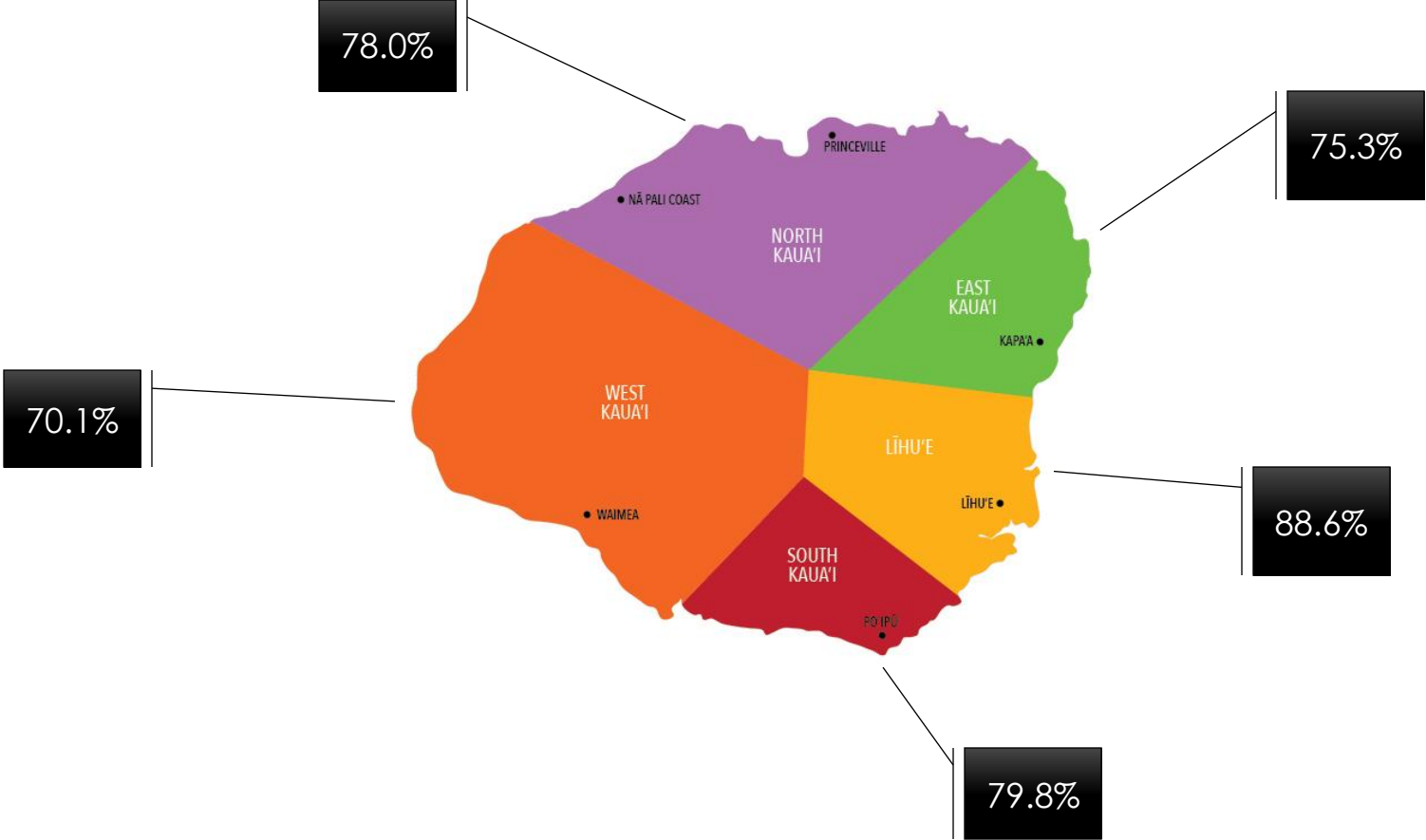
AREAS VISITED KAUA'I CHINA



AREAS VISITED KAUA'I KOREA



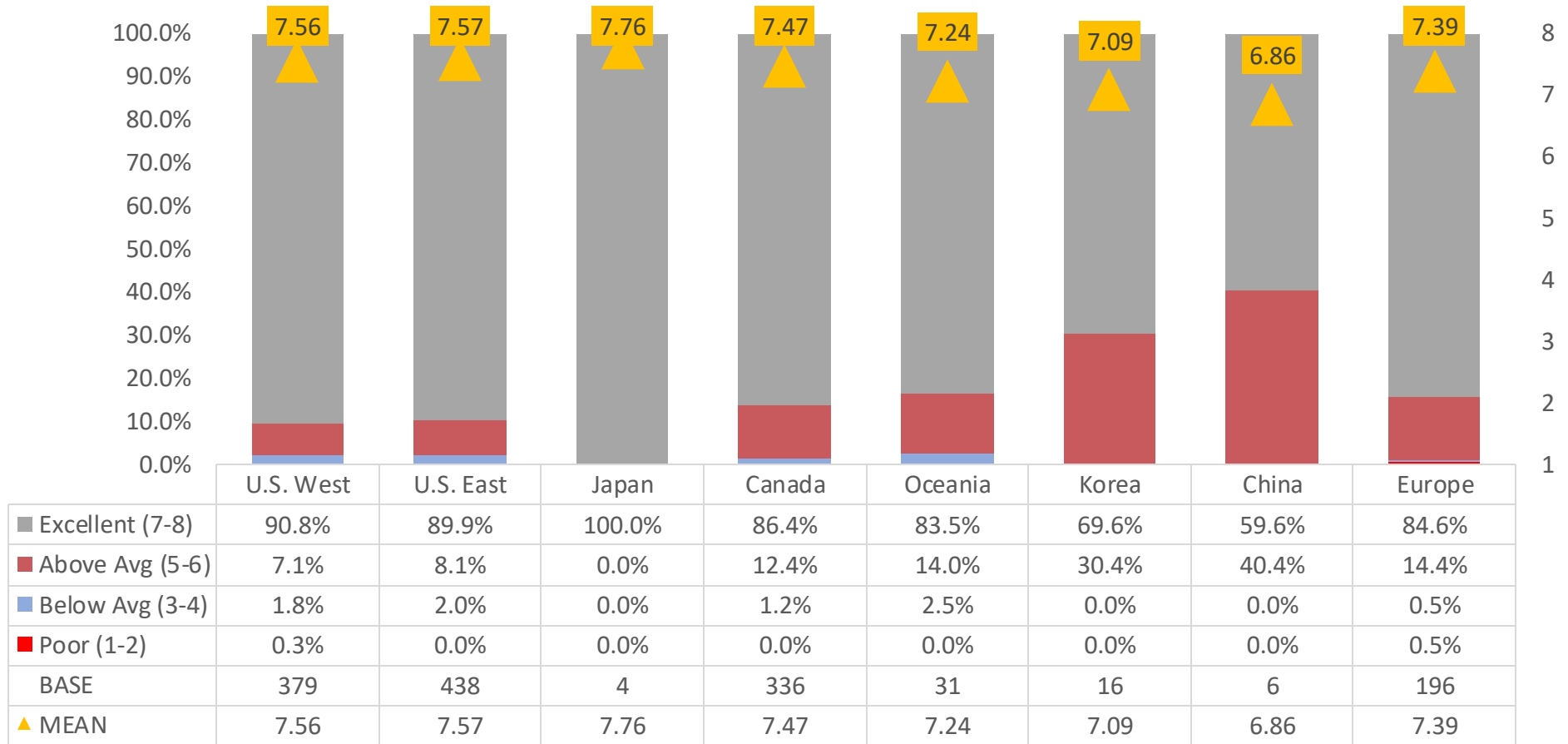
AREAS VISITED KAUA'I EUROPE



Section 7 – Maui

SATISFACTION - MAUI

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

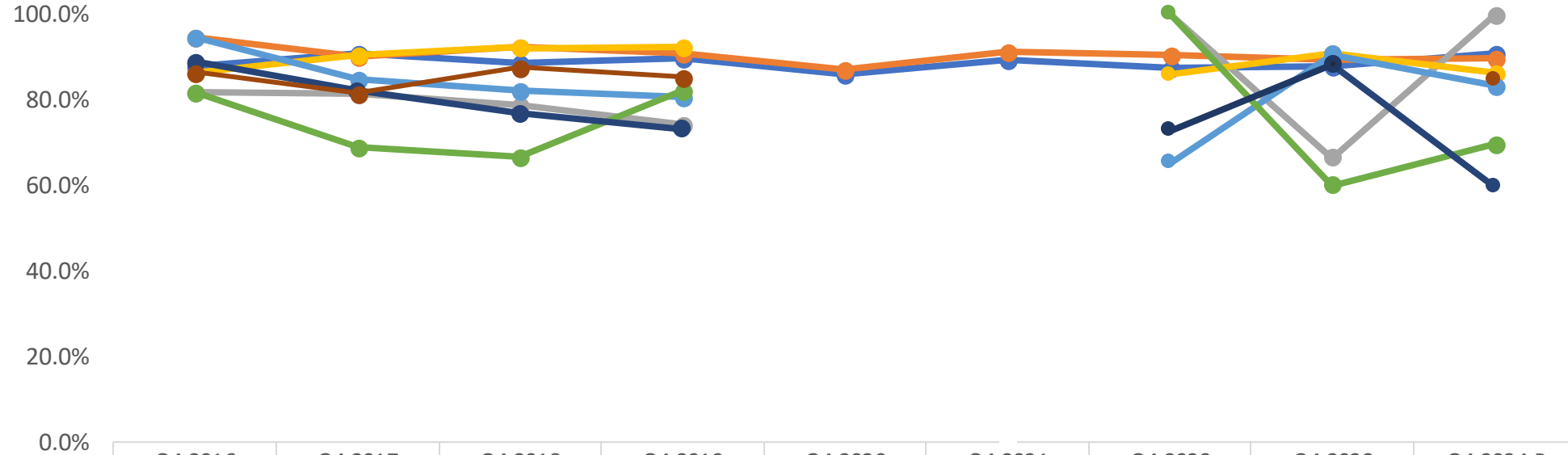


SATISFACTION - MAUI

- **Gender:** Female respondents from **U.S. West** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Education:** Those with a college degree from **U.S. West** were more satisfied with their stay than those without a college degree from this visitor market.
- **Islands visited:** Visitors from **U.S. East** whose trip was limited to just Maui were more satisfied with their stay compared to those whose trip included stops on other islands.

SATISFACTION - MAUI

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



	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	88.0%	90.9%	88.7%	89.9%	86.0%	89.4%	87.5%	87.8%	90.8%
U.S. East	94.5%	90.0%	92.3%	90.7%	87.2%	91.3%	90.6%	89.4%	89.9%
Japan	81.9%	81.5%	78.6%	74.3%			100.0%	66.4%	100.0%
Canada	86.2%	90.3%	92.3%	92.4%			85.8%	90.8%	86.4%
Oceania	94.8%	84.7%	82.2%	80.6%			65.2%	90.6%	83.5%
Korea	81.9%	68.9%	66.7%	82.1%			100.0%	60.0%	69.6%
China	88.8%	82.0%	76.8%	73.3%			72.9%	88.4%	59.6%
Europe	86.5%	81.5%	87.6%	85.3%					84.6%

P= Preliminary Data

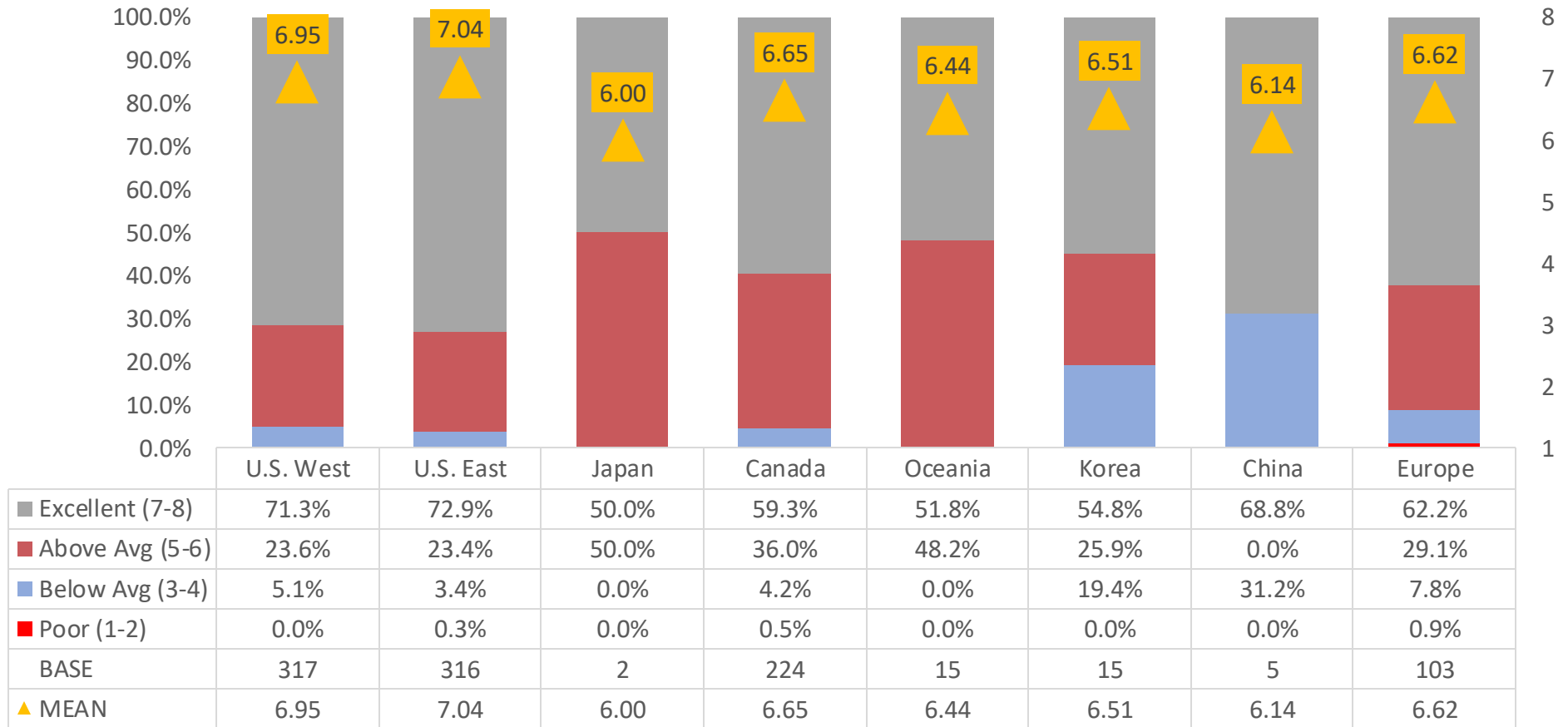
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. 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.



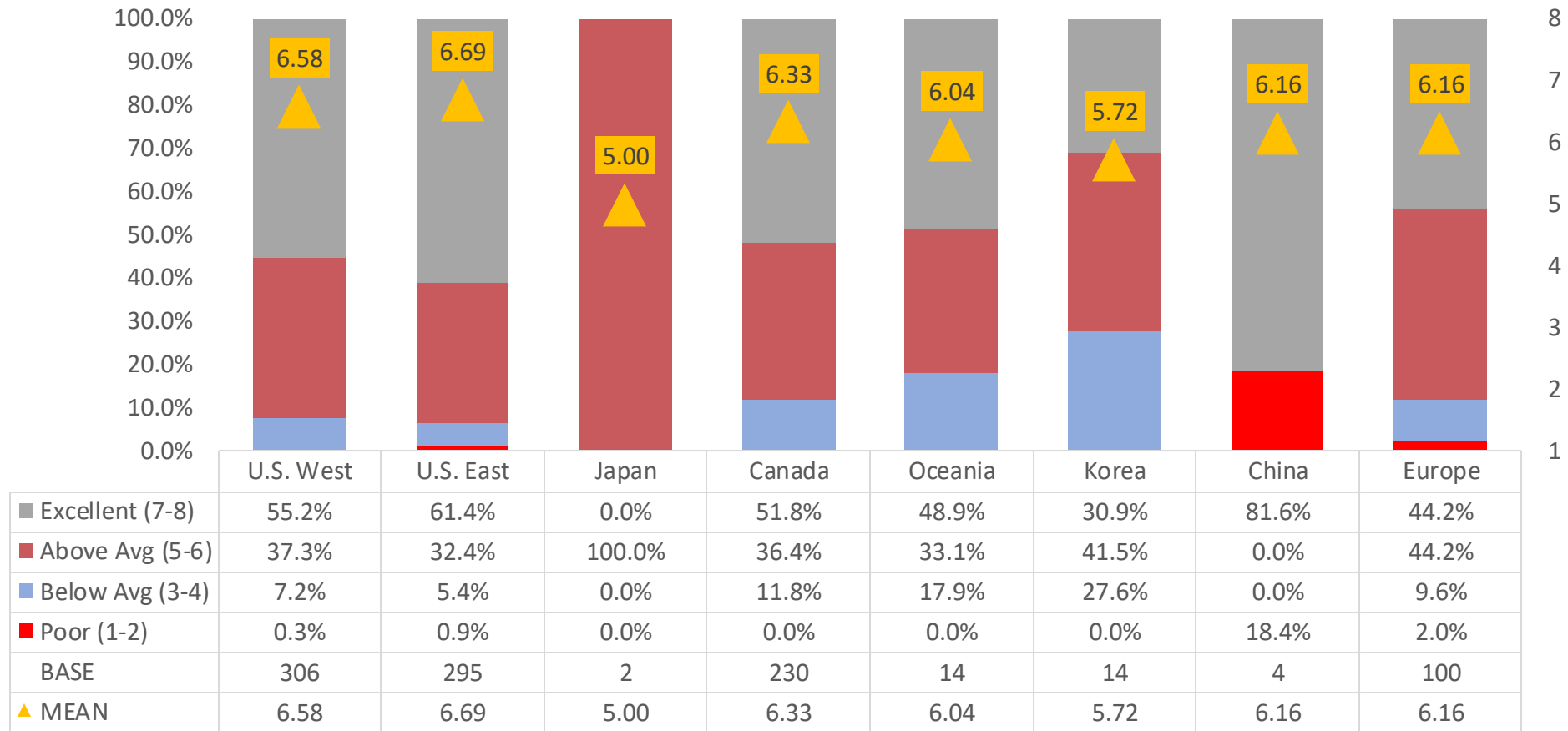
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



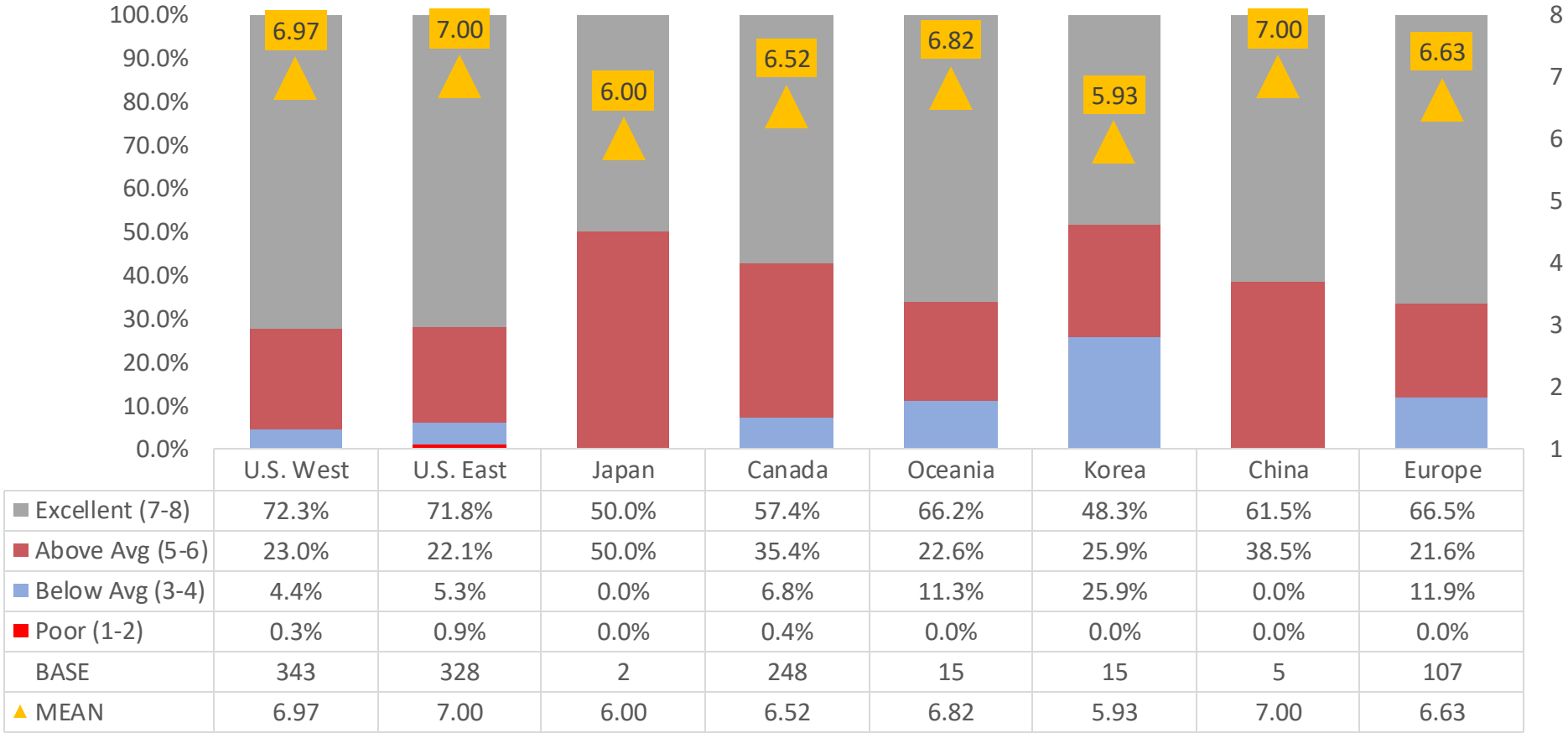
SHOPPING - MAUI

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



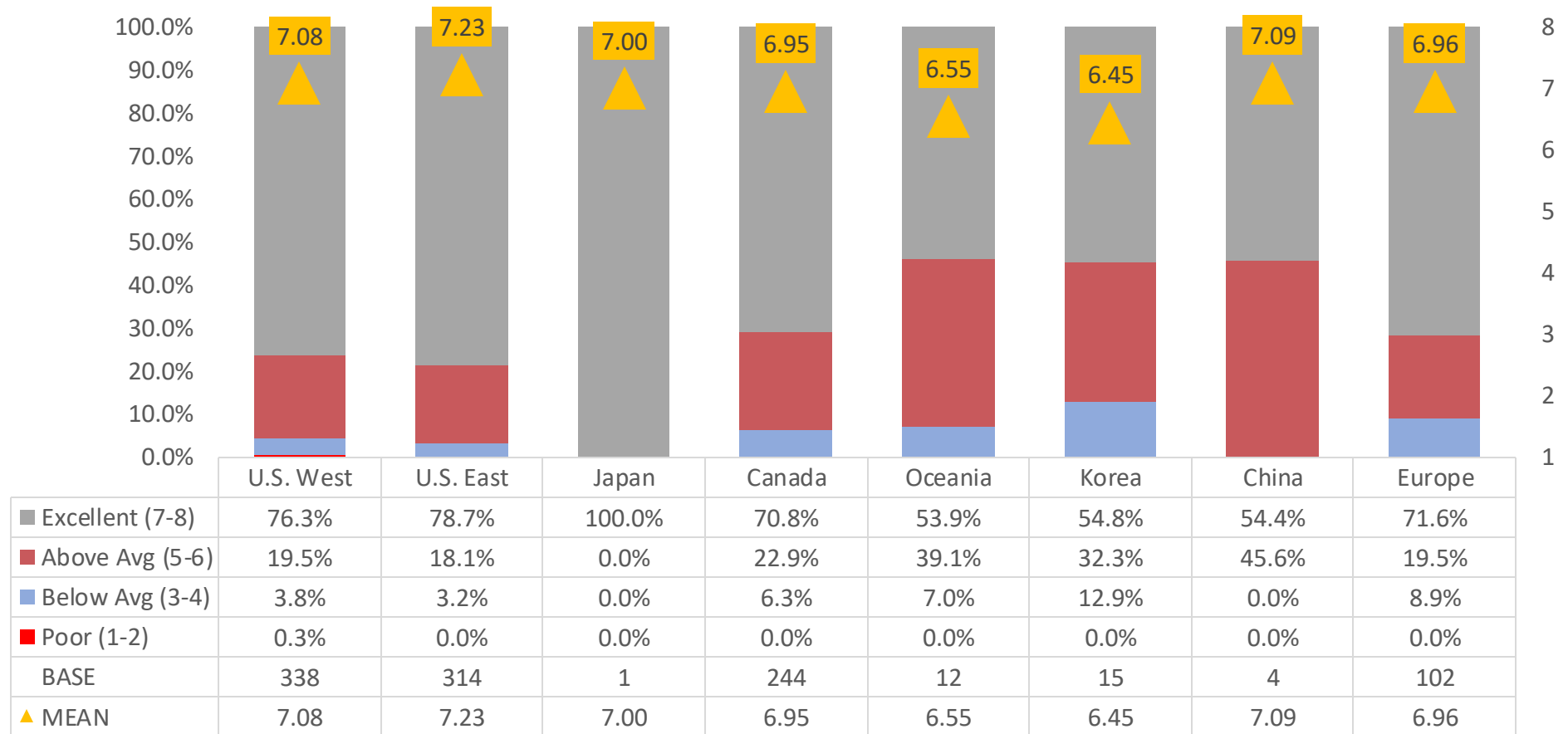
DINING/ FOOD & BEVERAGE - MAUI

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



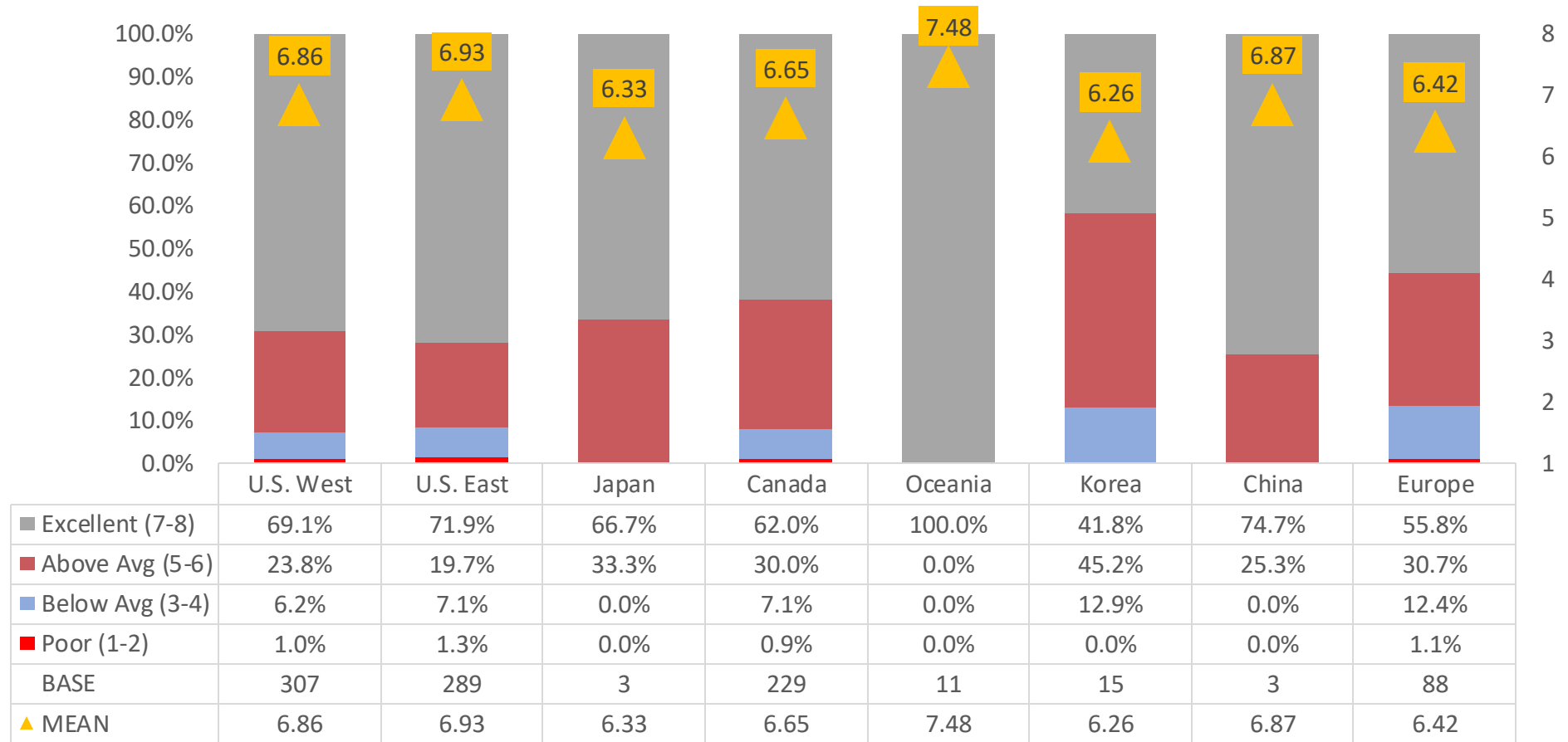
LODGING/ ACCOMMODATIONS - MAUI

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



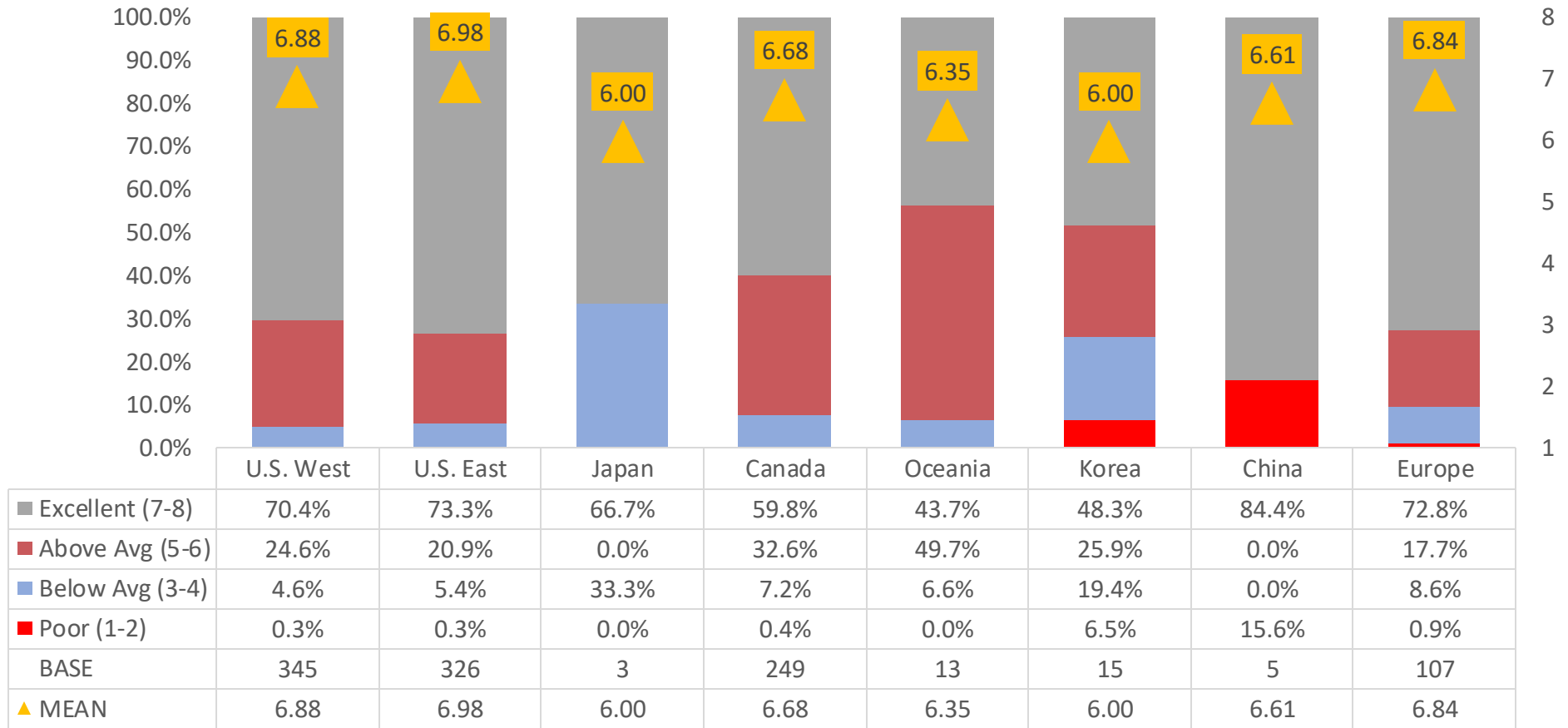
TRANSPORTATION ON ISLAND - MAUI

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



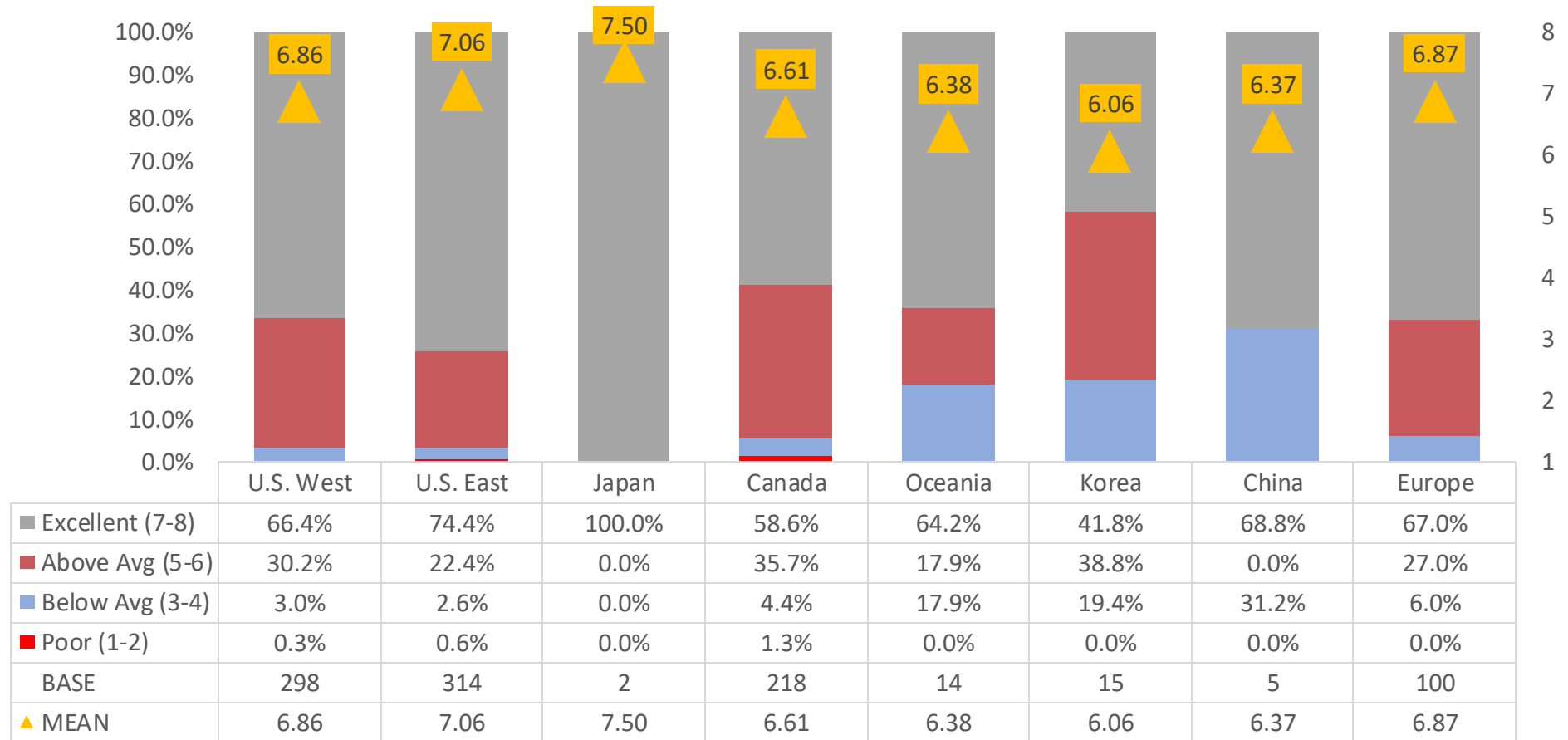
AIRPORT - MAUI

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



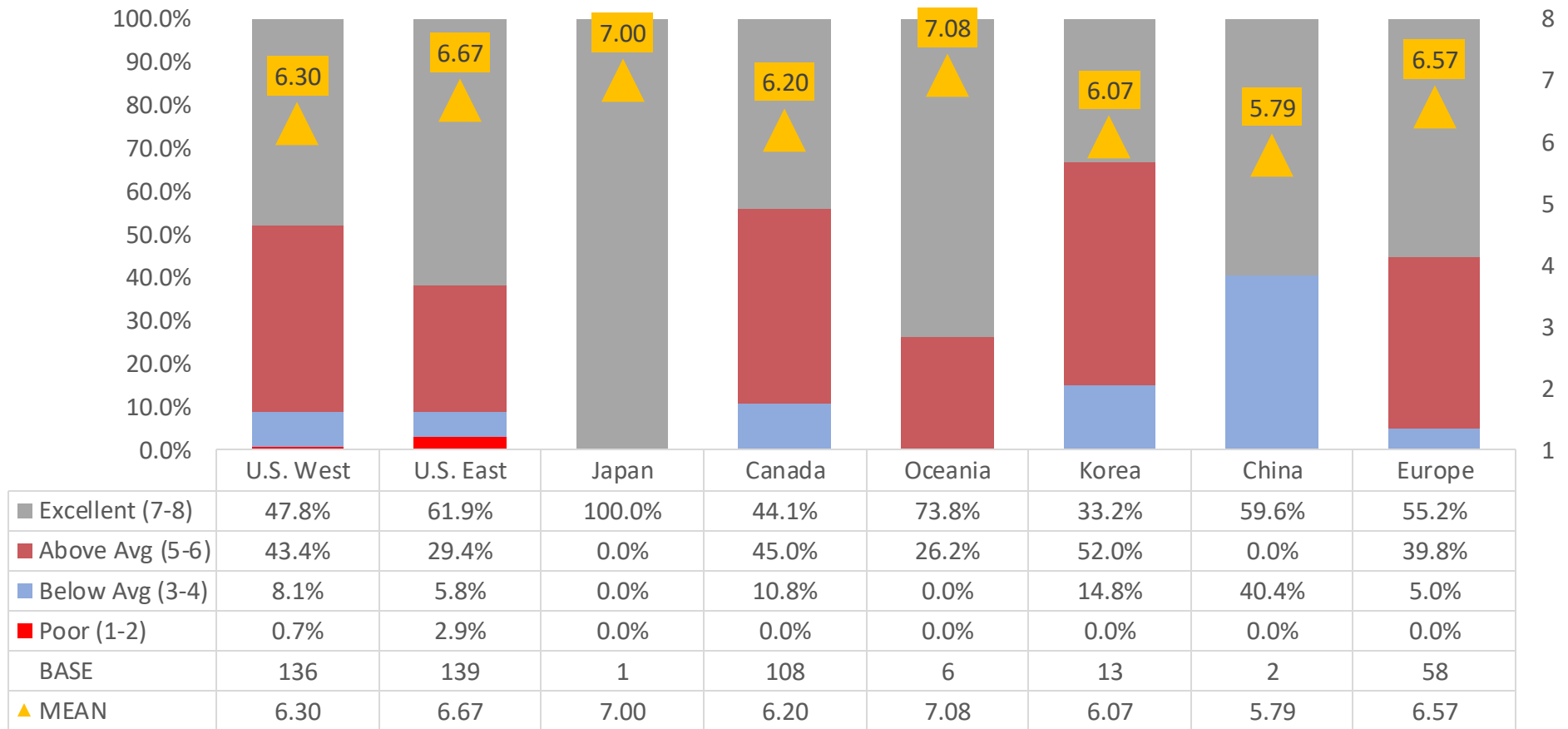
CULTURAL EXPERIENCES - MAUI

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



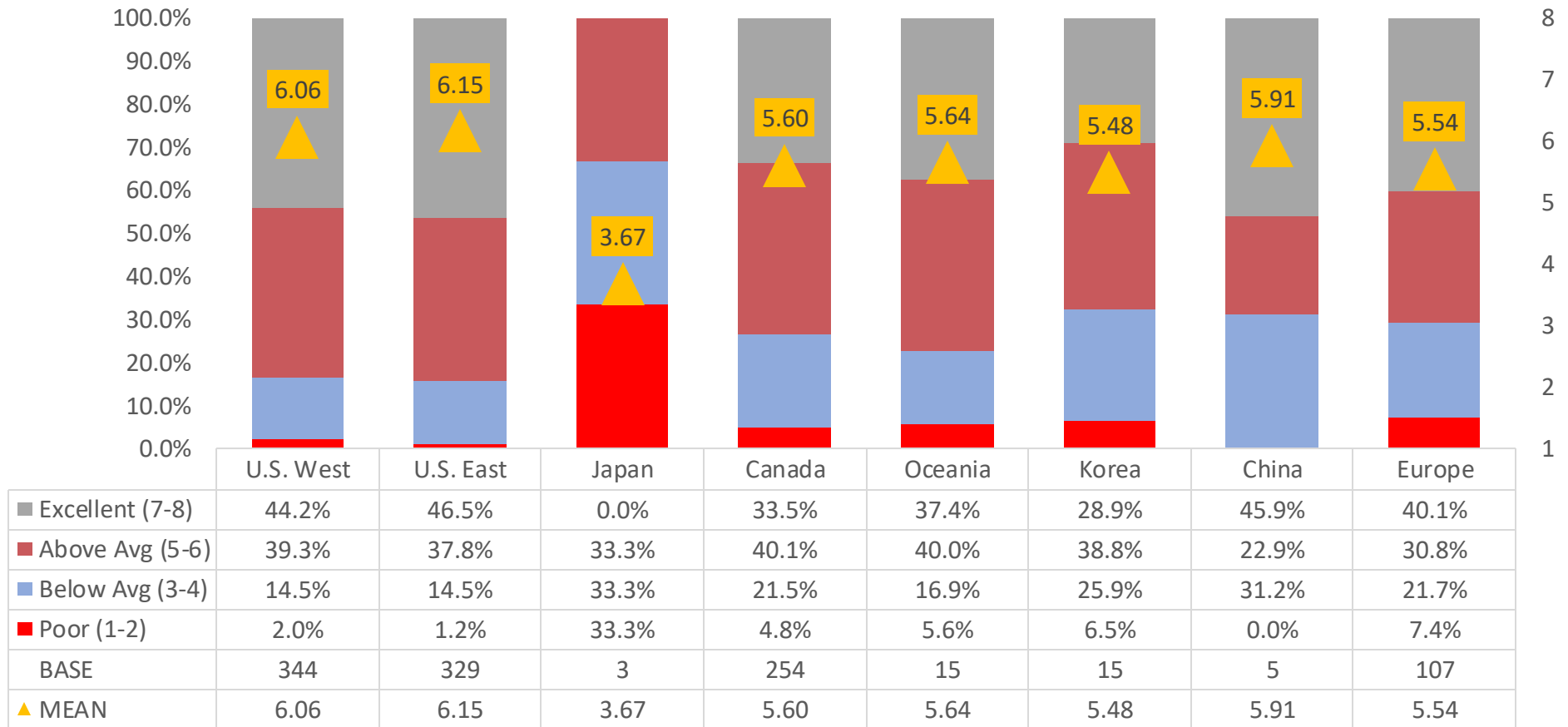
VOLUNTEER EXPERIENCES - MAUI

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



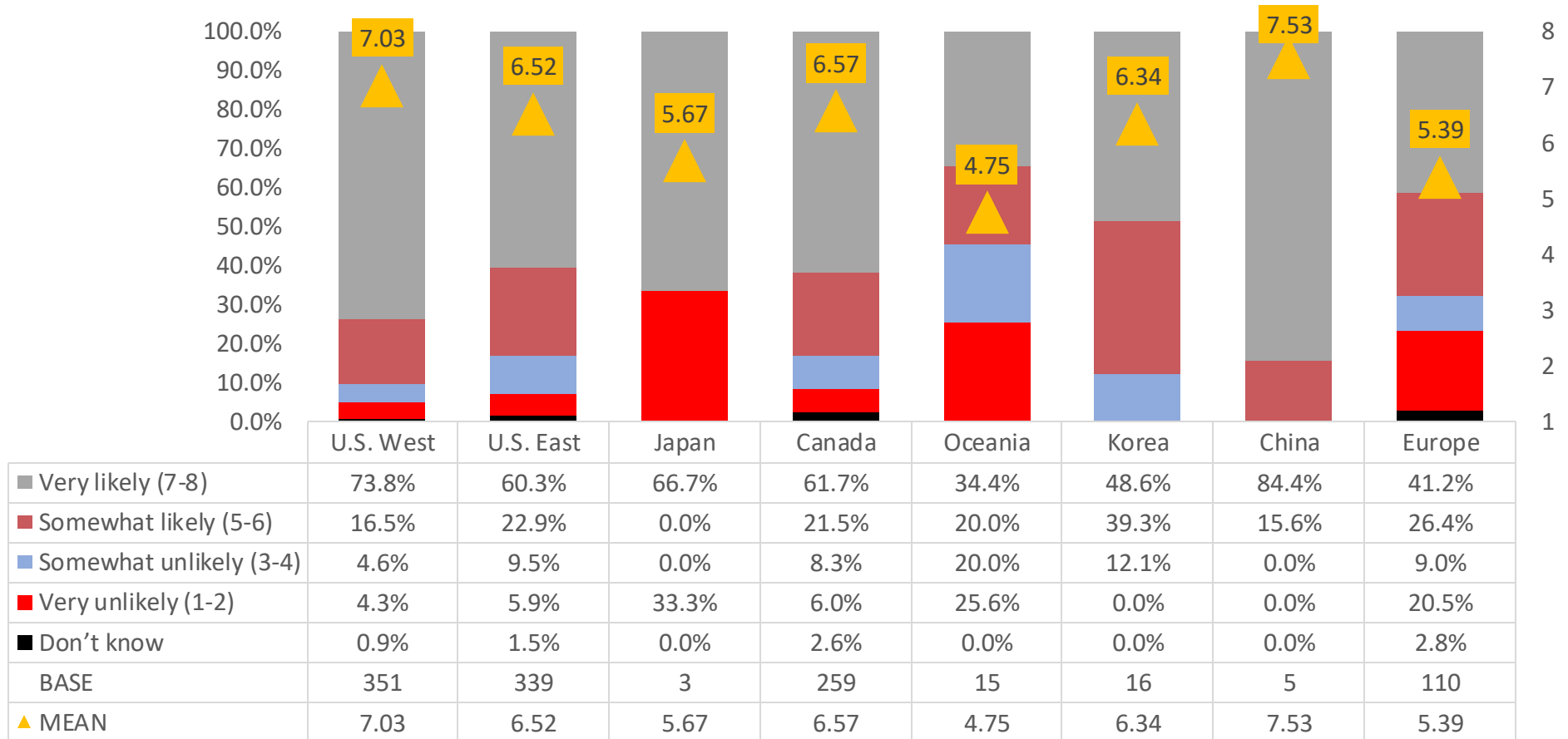
VALUE FOR THE MONEY - MAUI

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



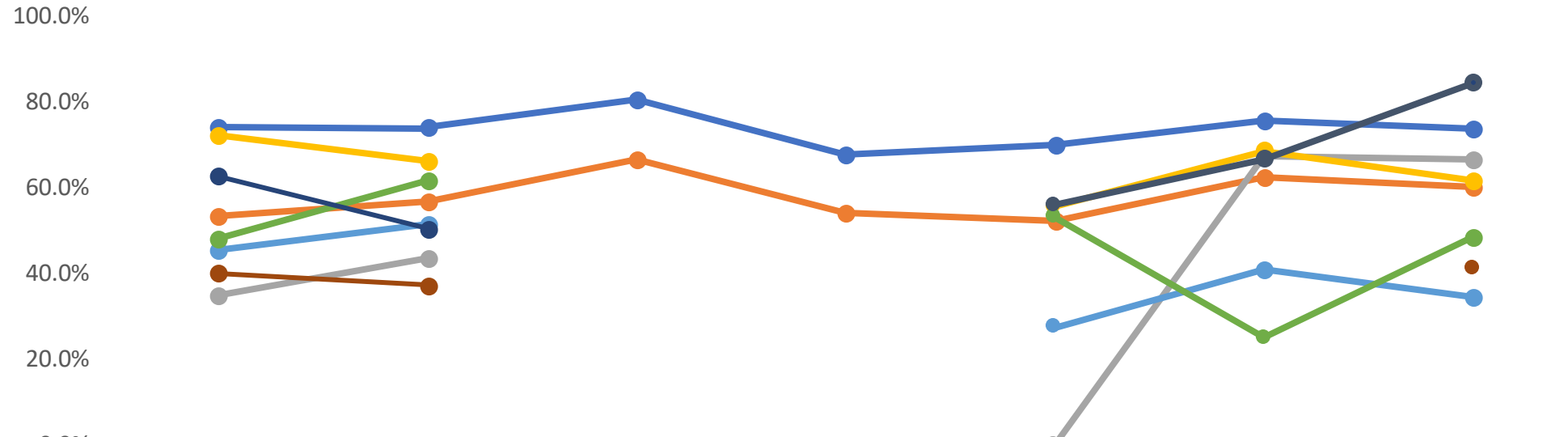
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 p
U.S. West	74.1%	74.0%	80.7%	67.8%	70.0%	75.7%	73.8%
U.S. East	53.4%	56.7%	66.5%	54.0%	52.3%	62.4%	60.3%
Japan	34.9%	43.5%			0.0%	67.2%	66.7%
Canada	72.4%	66.1%			55.6%	68.5%	61.7%
Oceania	45.5%	51.3%			27.4%	40.8%	34.4%
Korea	47.9%	61.5%			53.1%	25.0%	48.6%
China	62.7%	50.5%			55.9%	66.7%	84.4%
Europe	40.0%	37.2%					41.2%

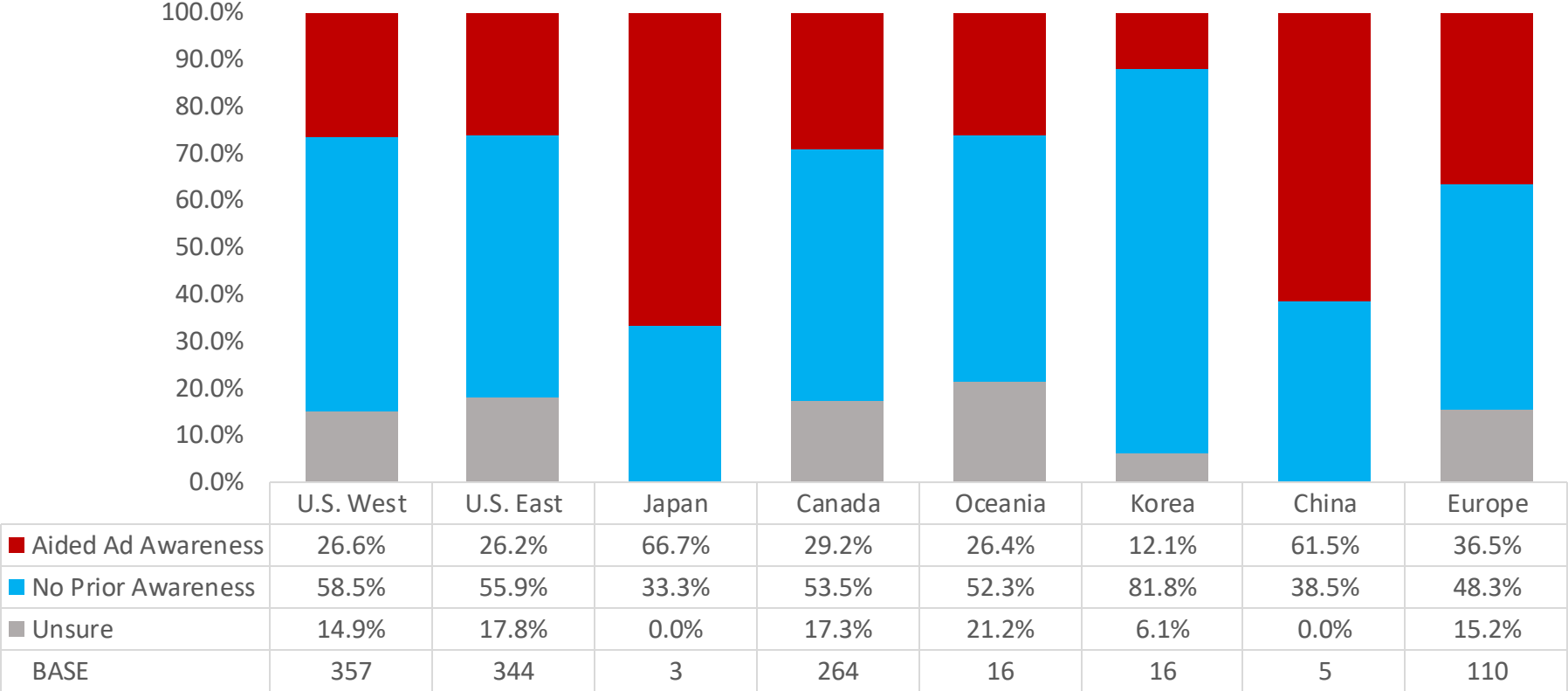
P= Preliminary Data

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.



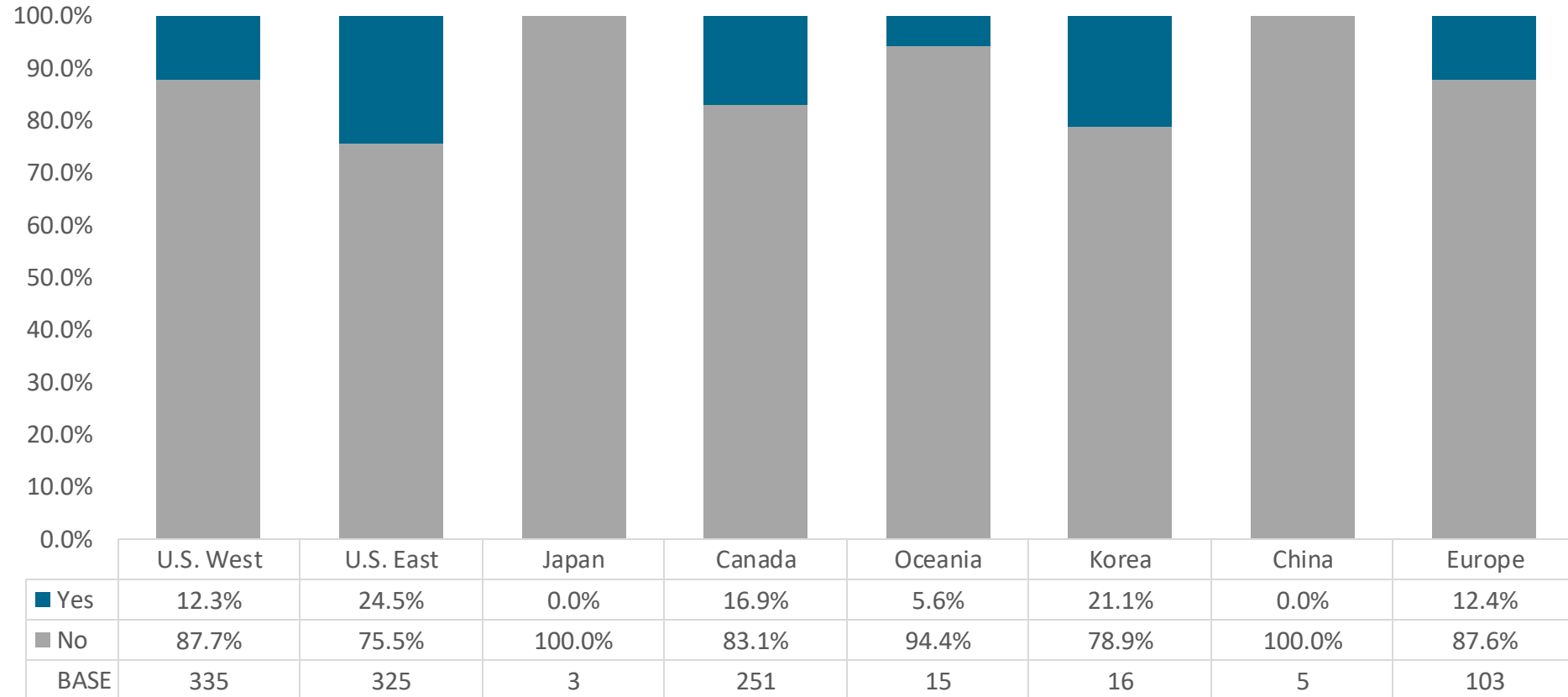
AIDED ADVERTISING AWARENESS - MAUI



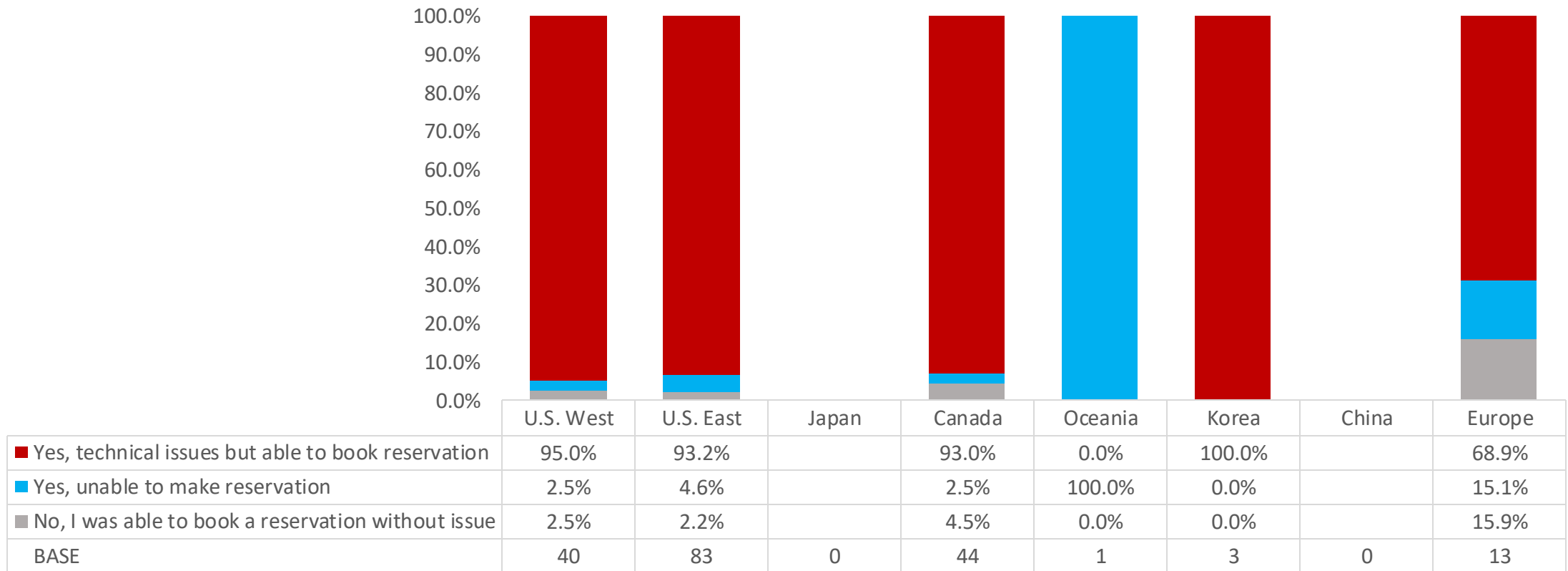
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	35.9%	44.9%	33.3%	44.6%	26.4%	45.9%	54.6%	49.0%
Hawaiian cultural events	9.8%	12.1%	33.3%	10.5%	0.0%	15.6%	12.1%	14.4%
Outdoor or sporting activities and events	20.7%	16.7%	0.0%	16.5%	0.0%	0.0%	6.1%	18.3%
Social media posts and videos	12.9%	13.9%	0.0%	13.8%	21.2%	0.0%	18.2%	15.2%
Hawaiian music	7.8%	6.1%	33.3%	7.2%	0.0%	0.0%	0.0%	6.4%
Television programs or movies filmed in Hawai'i	4.5%	5.5%	0.0%	9.4%	8.0%	22.9%	0.0%	15.4%
BASE	357	344	3	264	16	5	16	110

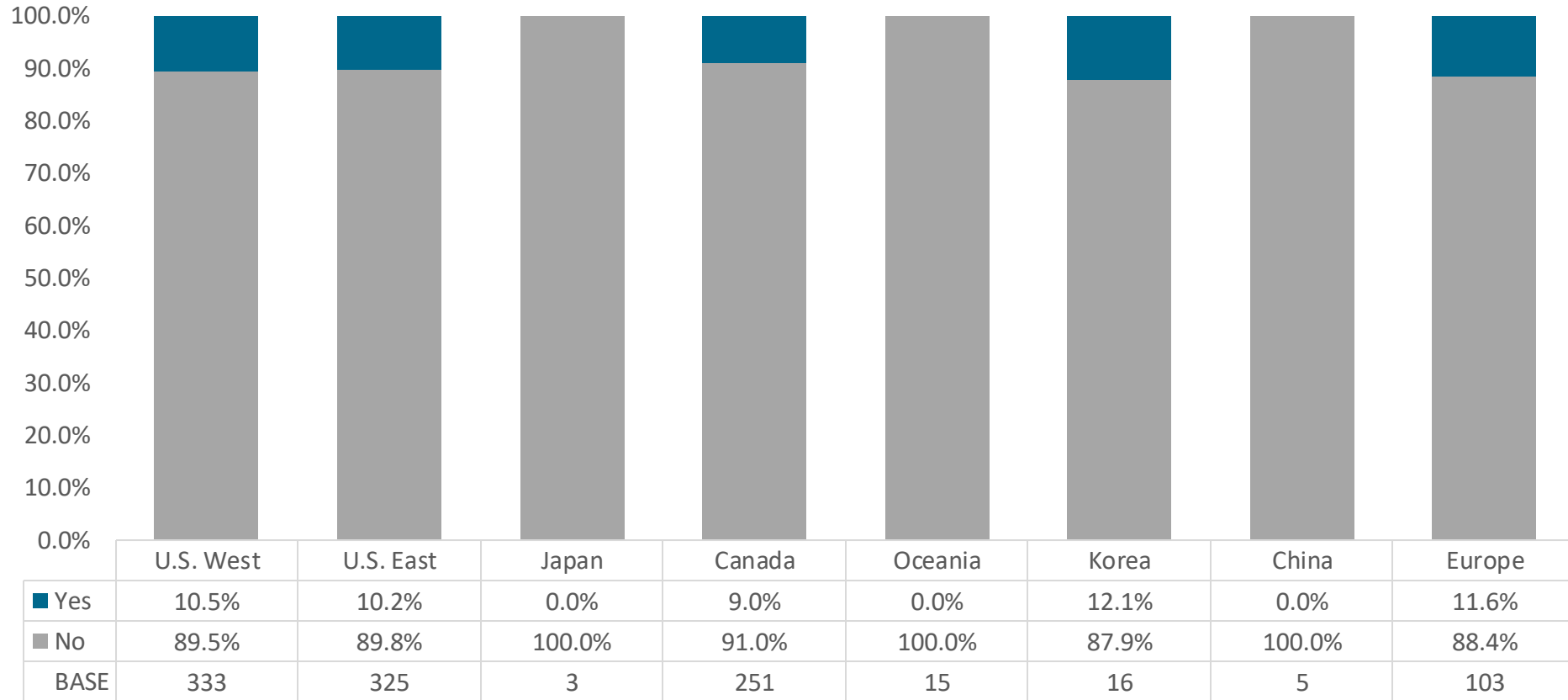
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



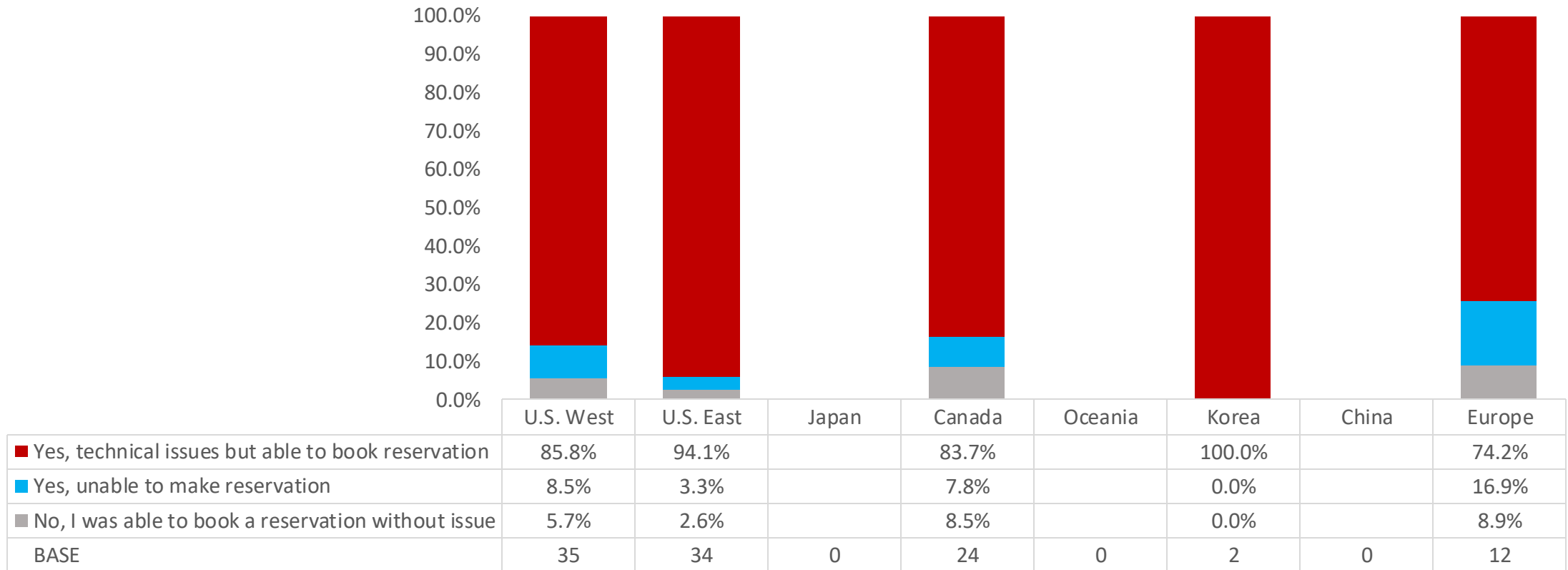
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



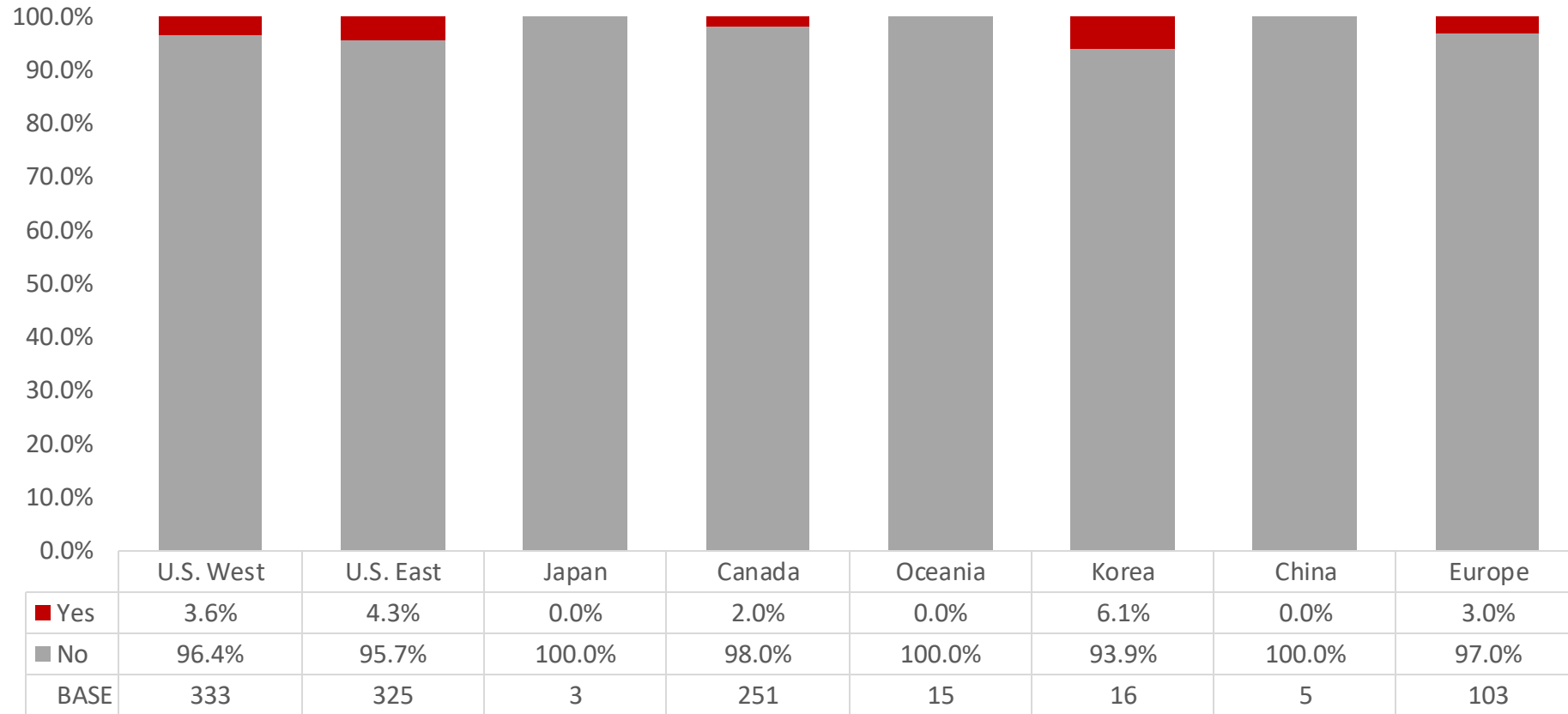
‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



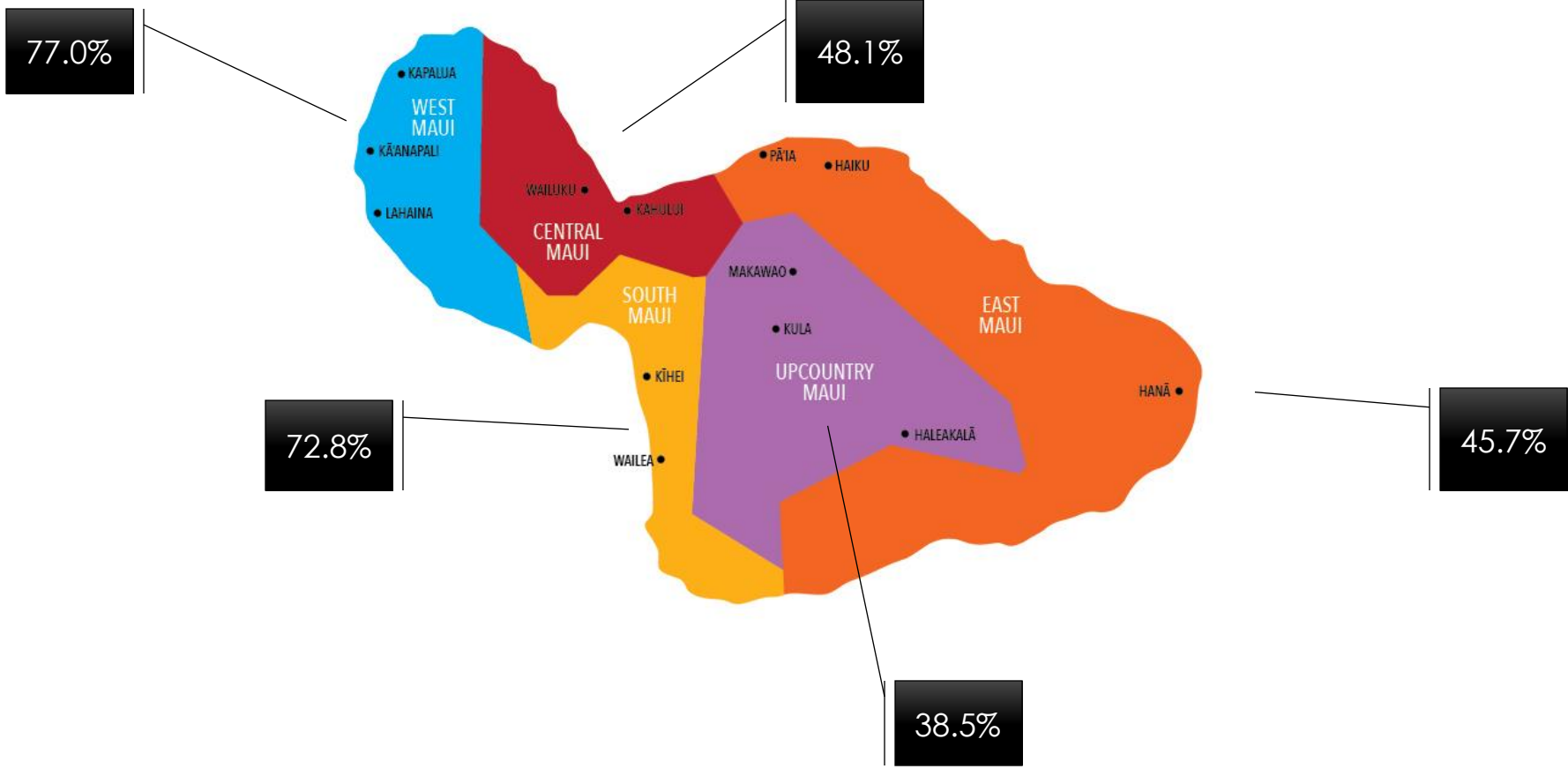
VISITED MAUI FOR SPECIFIC EVENT



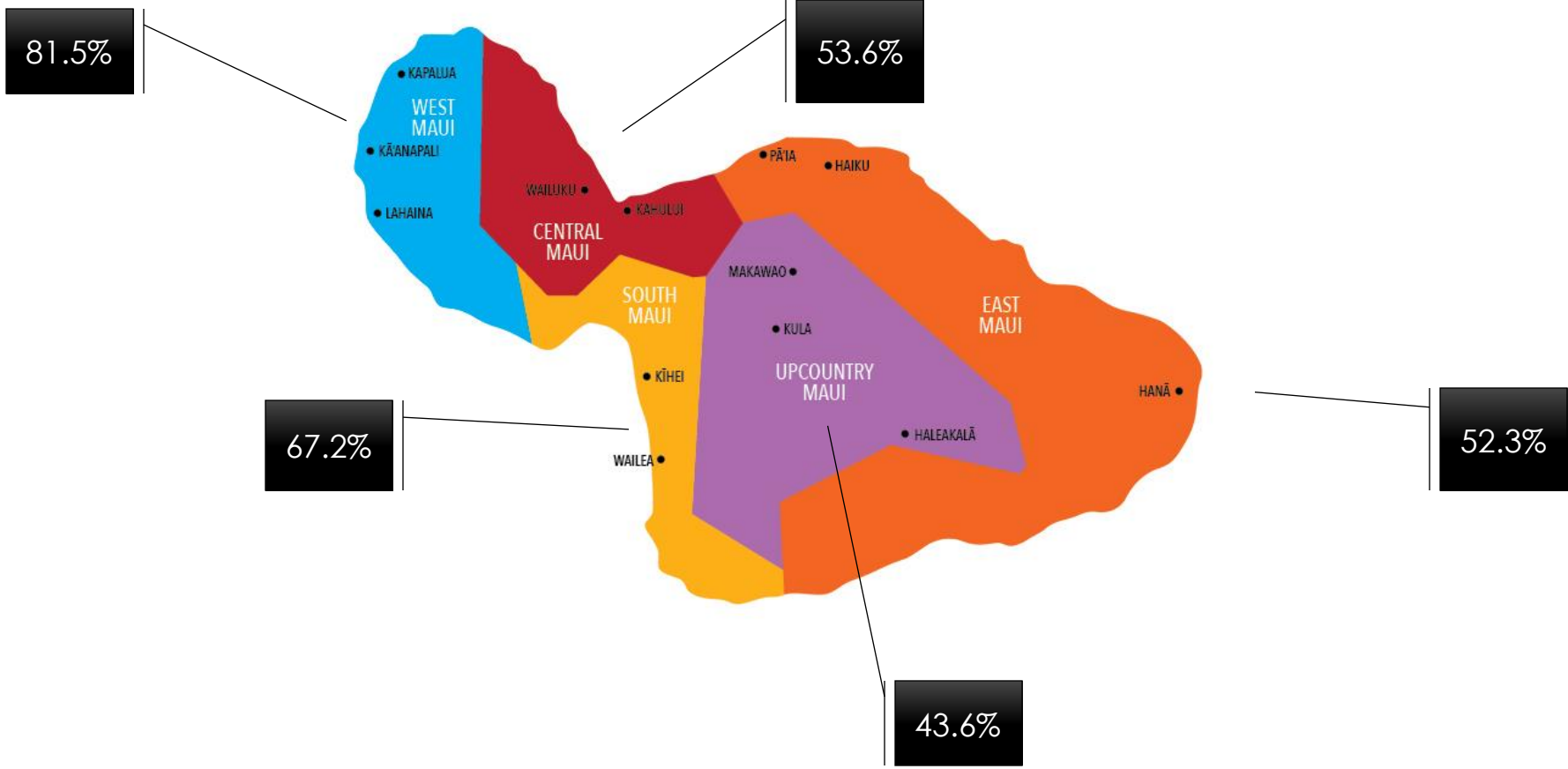
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Maui Invitational	33.3%	92.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Festival/concert	16.6%	7.8%	0.0%	21.4%	0.0%	0.0%	0.0%	0.0%
Convention/Conference/ Retreat/Seminar/Meeting/ Workshop/ Training/Work event	16.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	34.4%
Other sporting event	8.3%	0.0%	0.0%	21.4%	0.0%	0.0%	0.0%	65.6%
Other (please specify festival/event name)	8.5%	0.0%	0.0%	18.0%	0.0%	0.0%	0.0%	0.0%
Hawai'i Food and Wine Festival	8.3%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
Wedding/Honeymoon/ Anniversary/Birthday/ Funeral/ Graduation	8.3%	0.0%	0.0%	18.0%	0.0%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	0.0%	0.0%	0.0%	21.4%	0.0%	0.0%	0.0%	0.0%
BASE	12	14	0	5	0	1	0	3

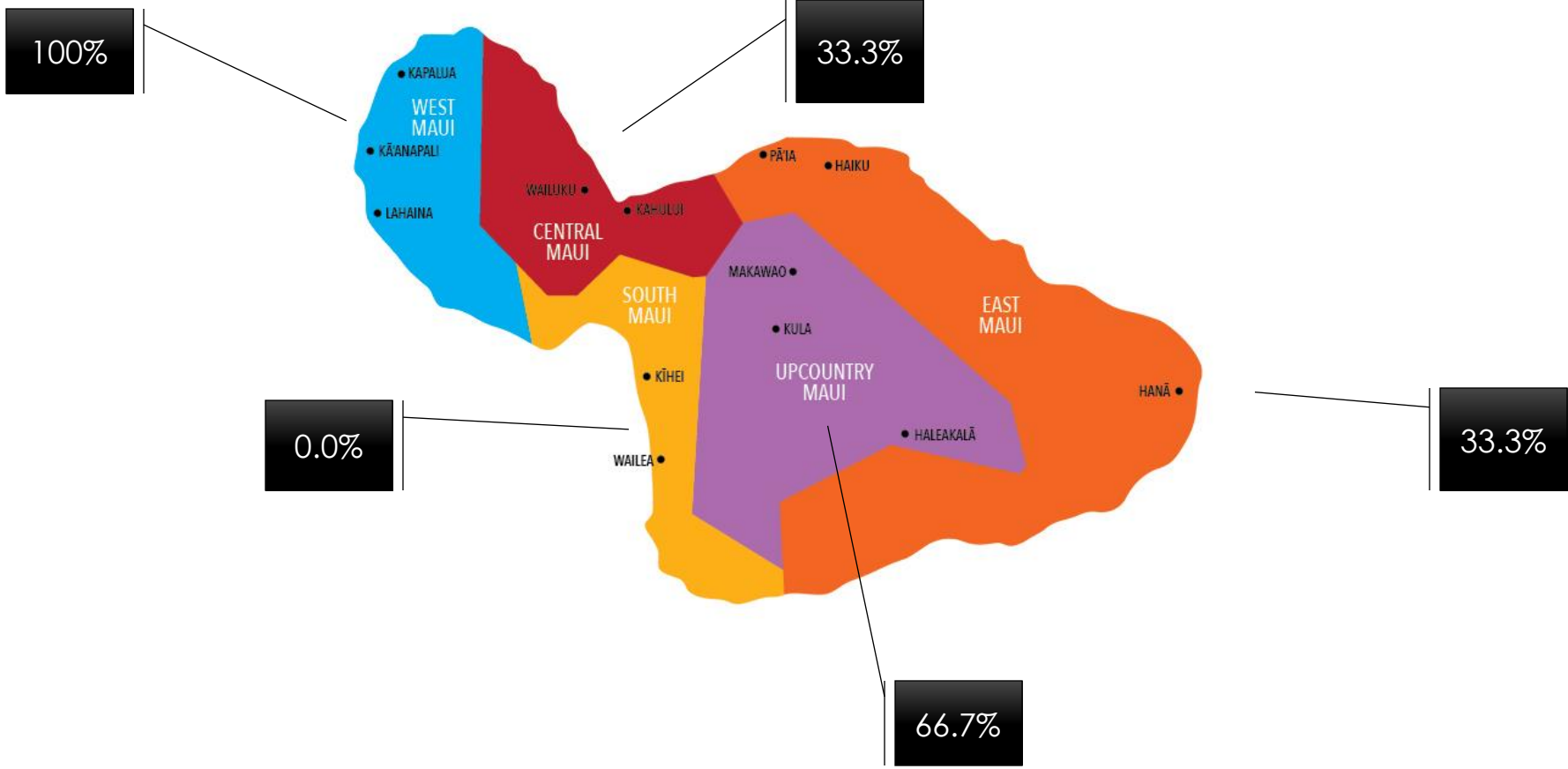
AREAS VISITED MAUI U.S. WEST



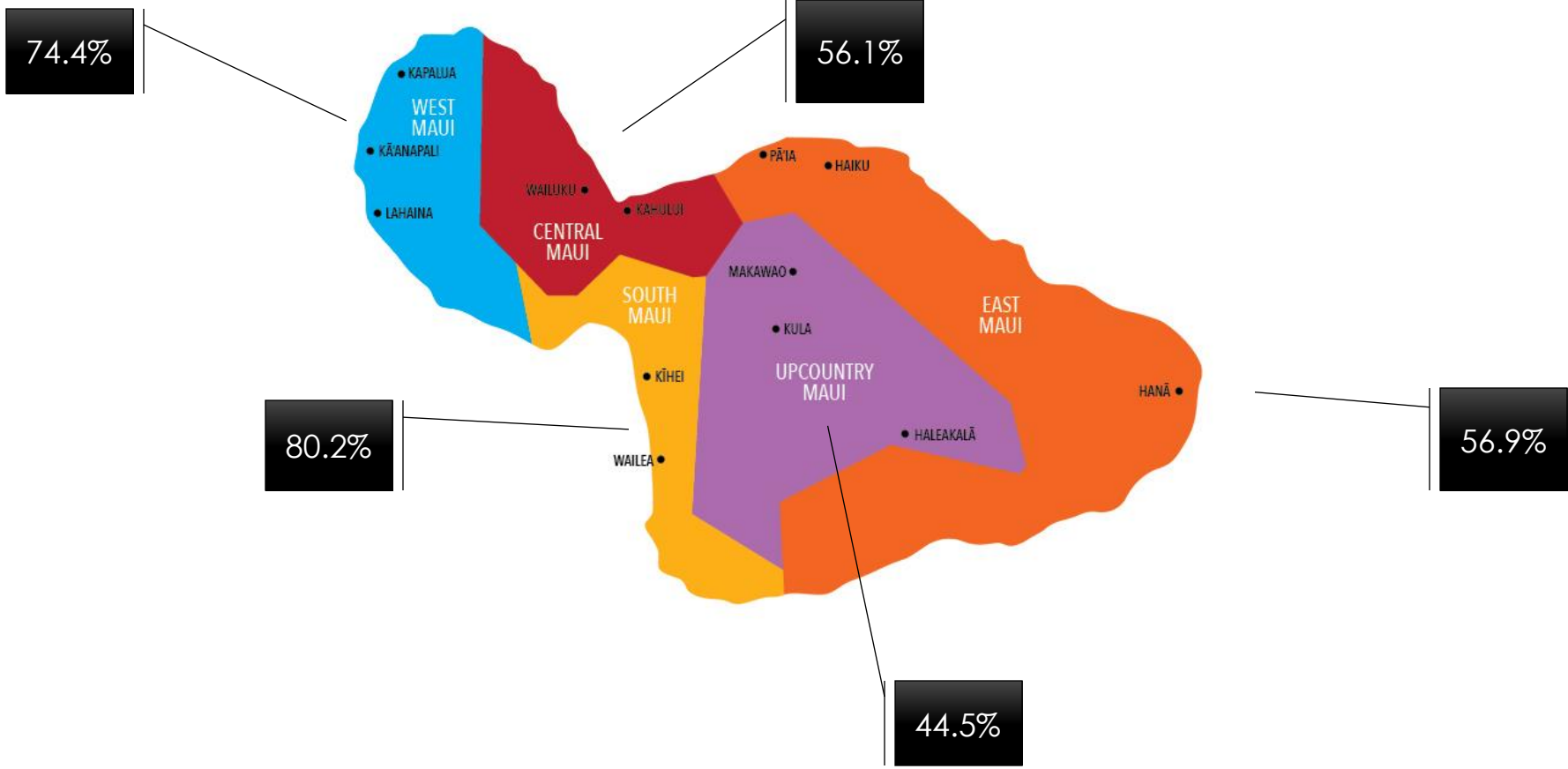
AREAS VISITED MAUI U.S. EAST



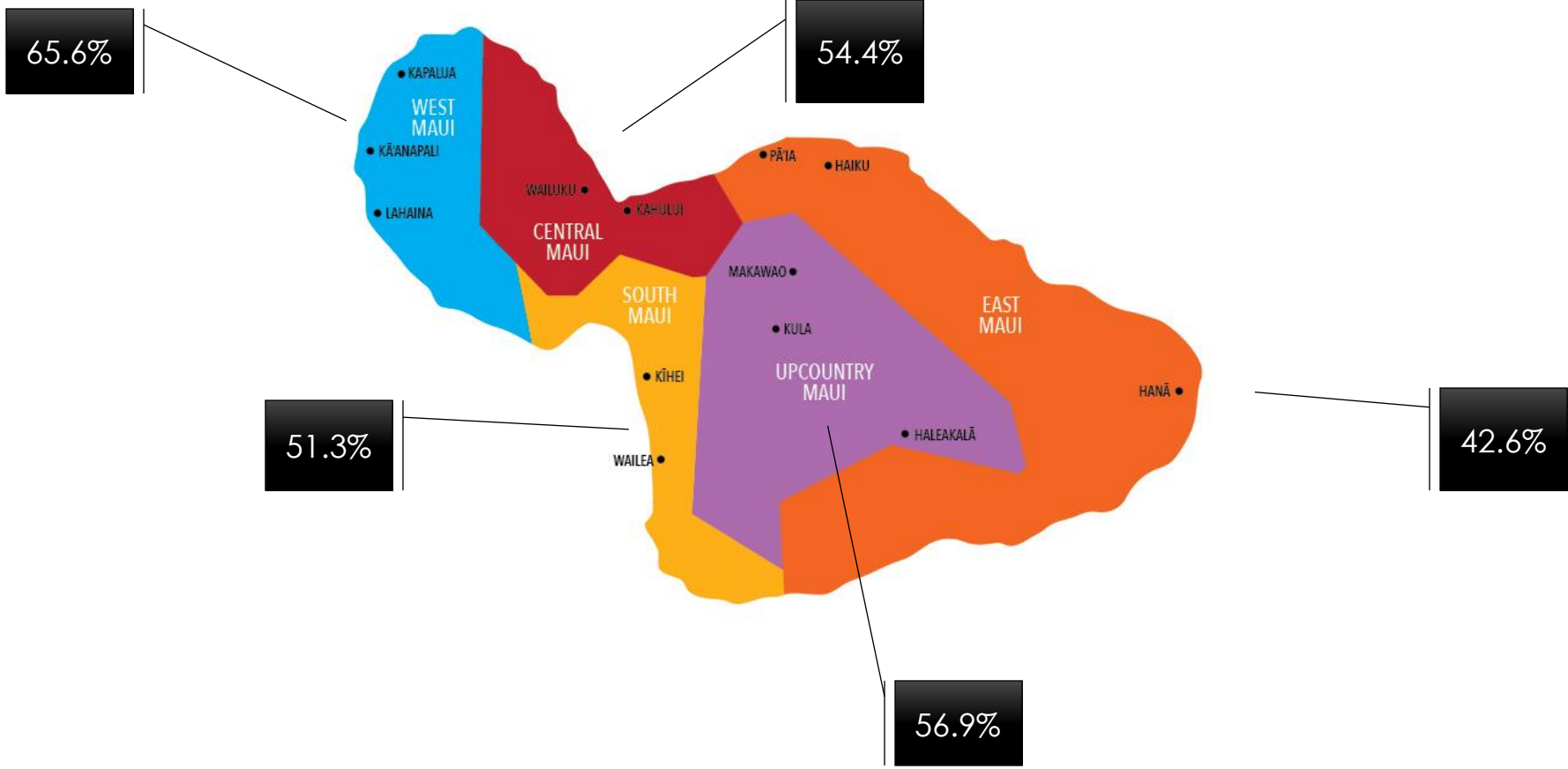
AREAS VISITED MAUI JAPAN



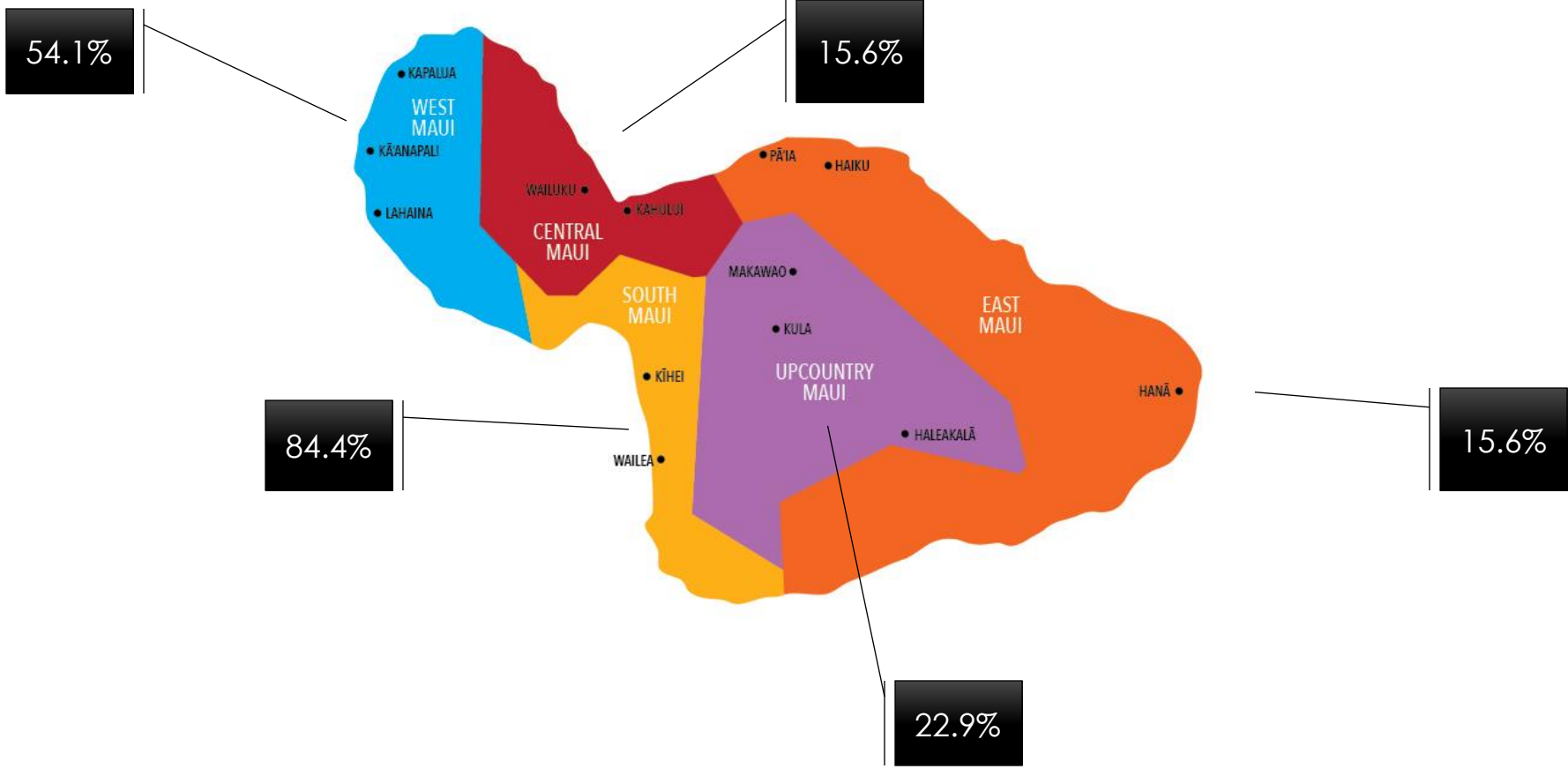
AREAS VISITED MAUI CANADA



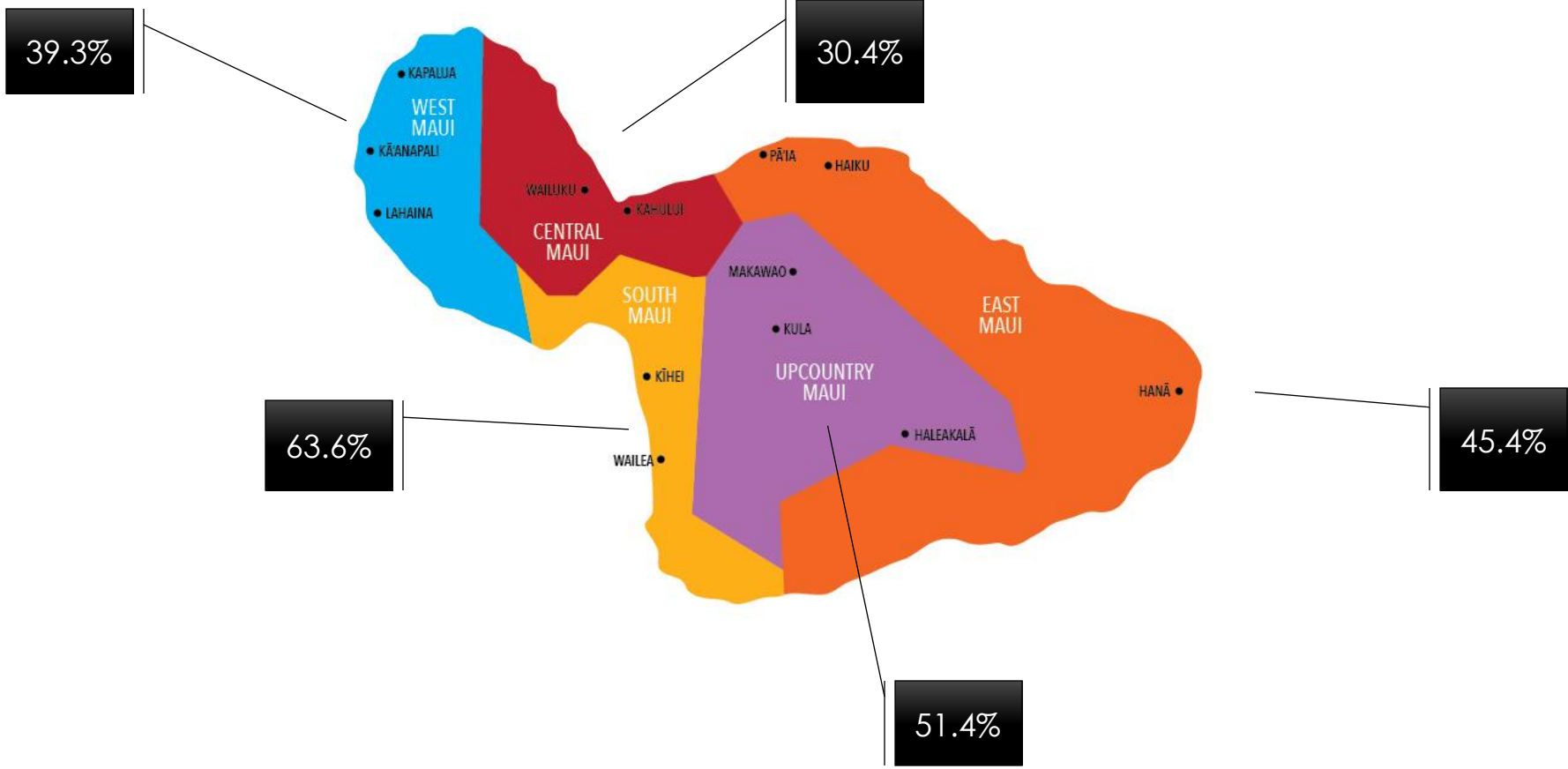
AREAS VISITED MAUI OCEANIA



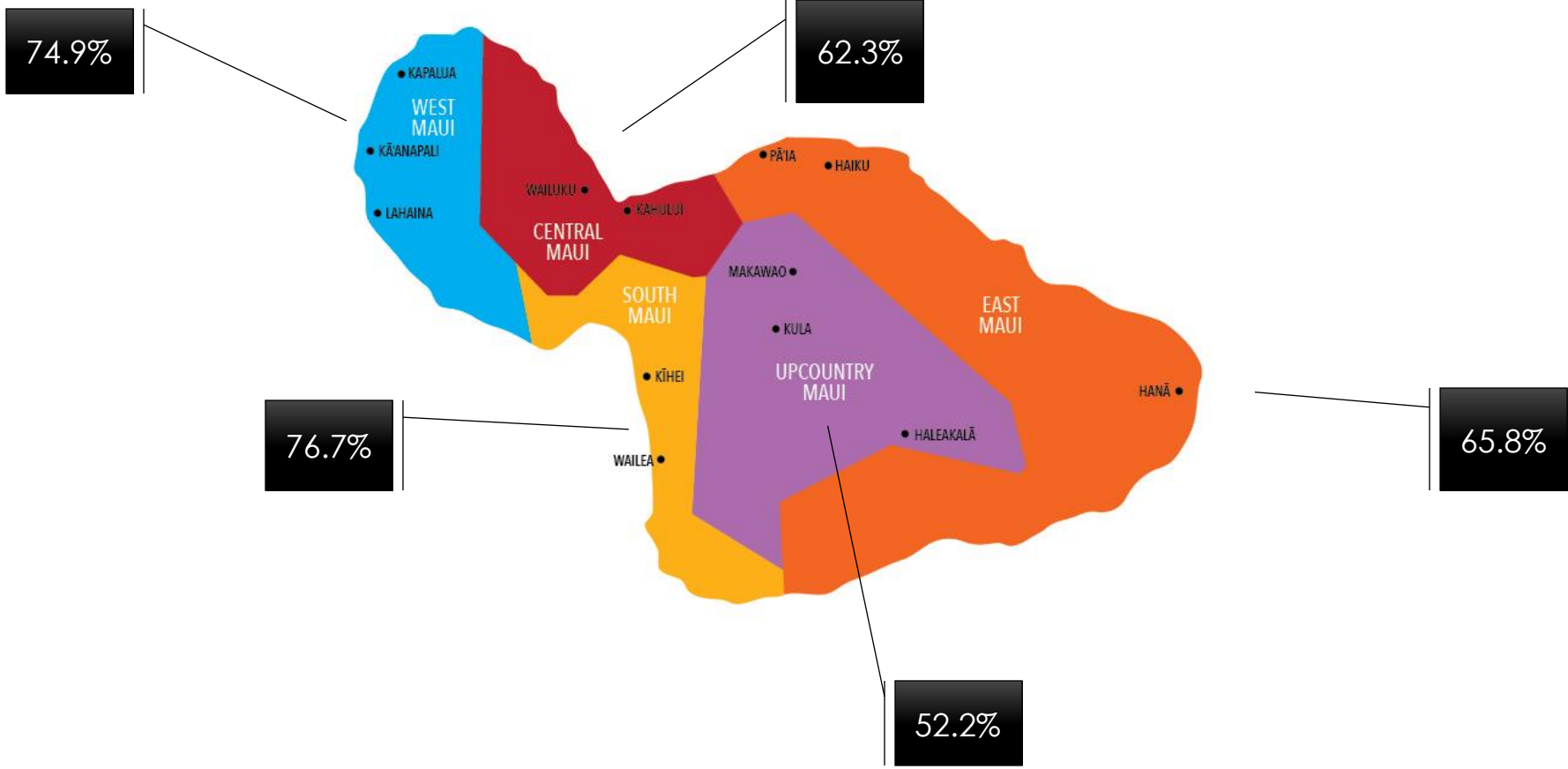
AREAS VISITED MAUI CHINA



AREAS VISITED MAUI KOREA



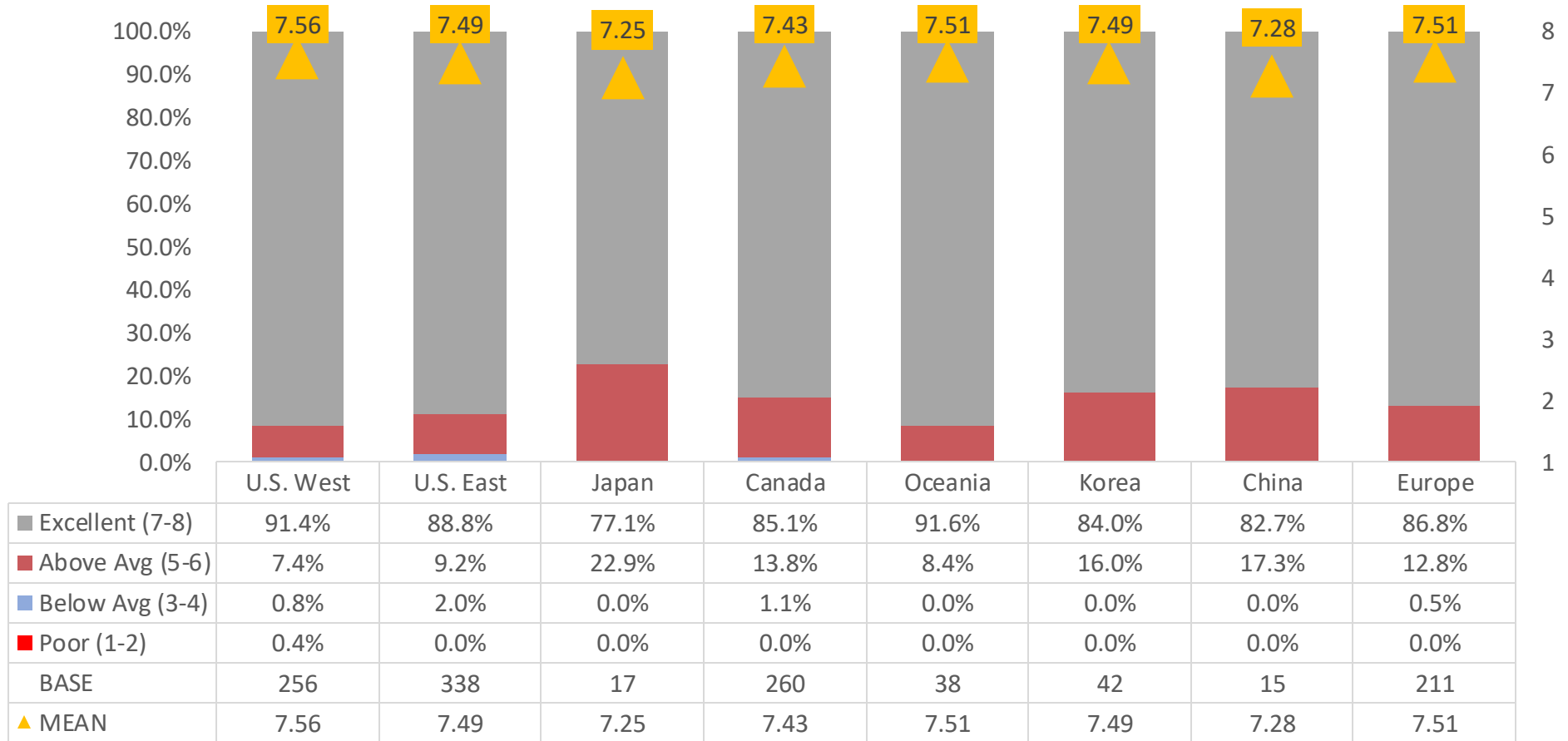
AREAS VISITED MAUI EUROPE



Section 8 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

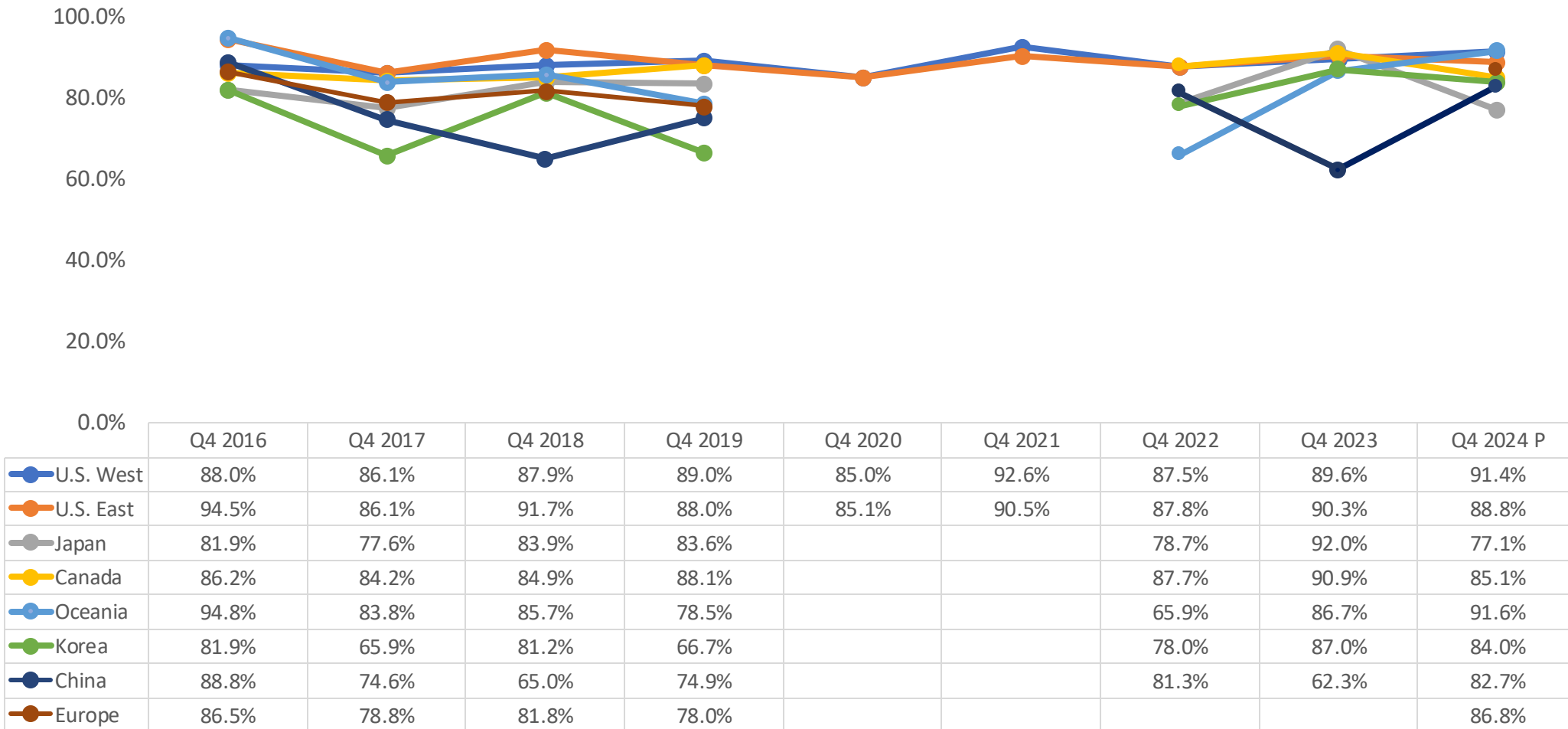
8-pt Rating Scale
8 = Excellent / 1 = Poor



SATISFACTION - ISLAND OF HAWAII

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

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

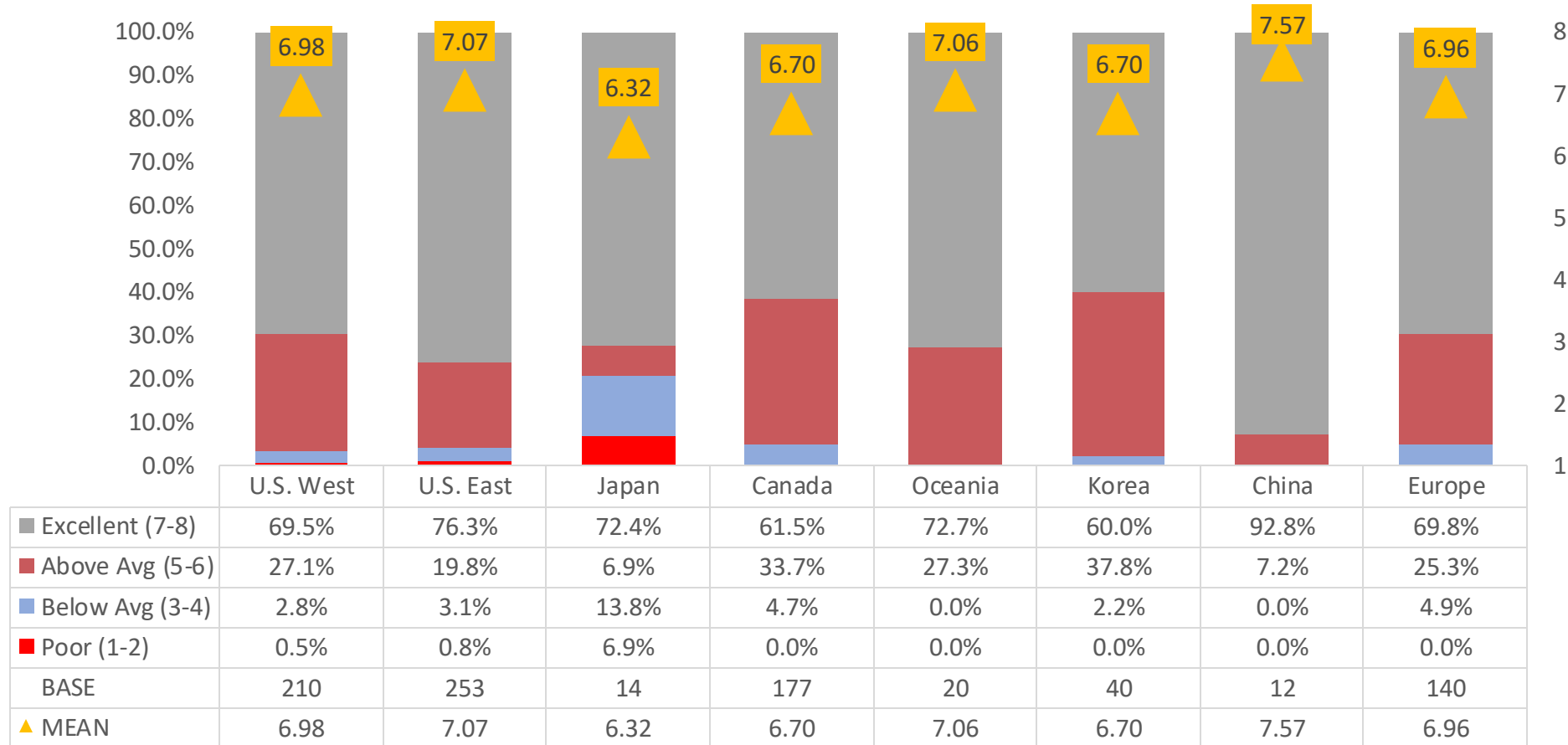


P= Preliminary Data

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

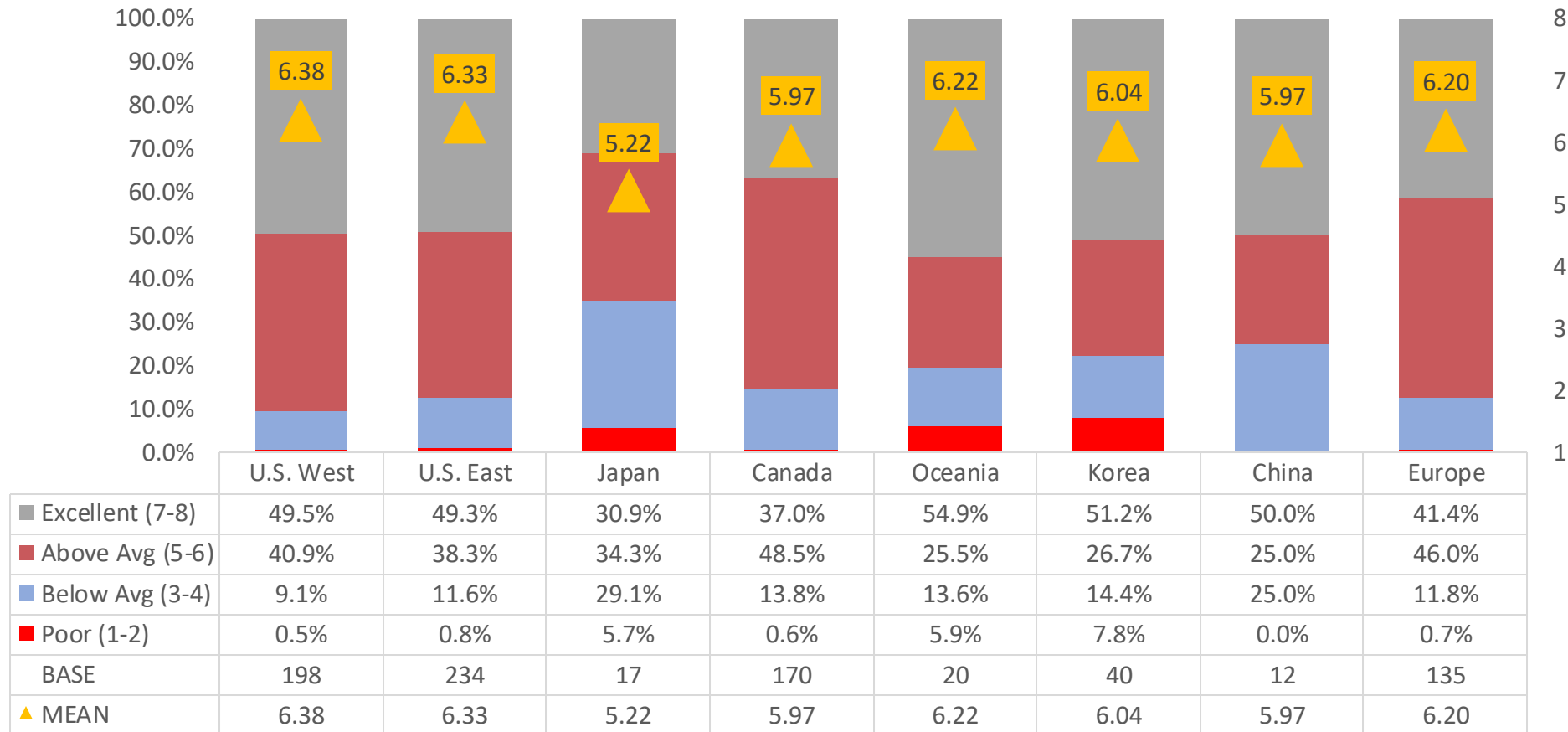
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



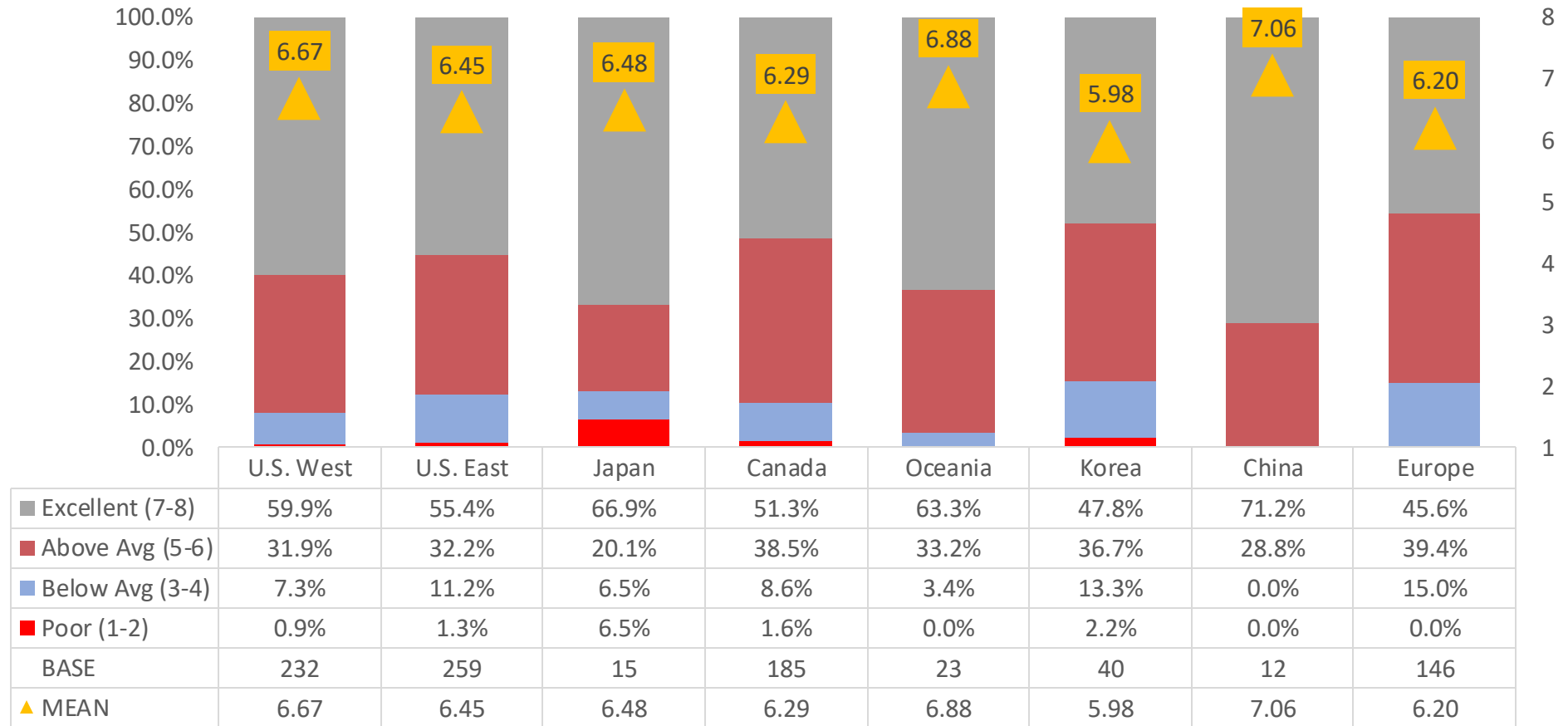
SHOPPING - ISLAND OF HAWAI‘I

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



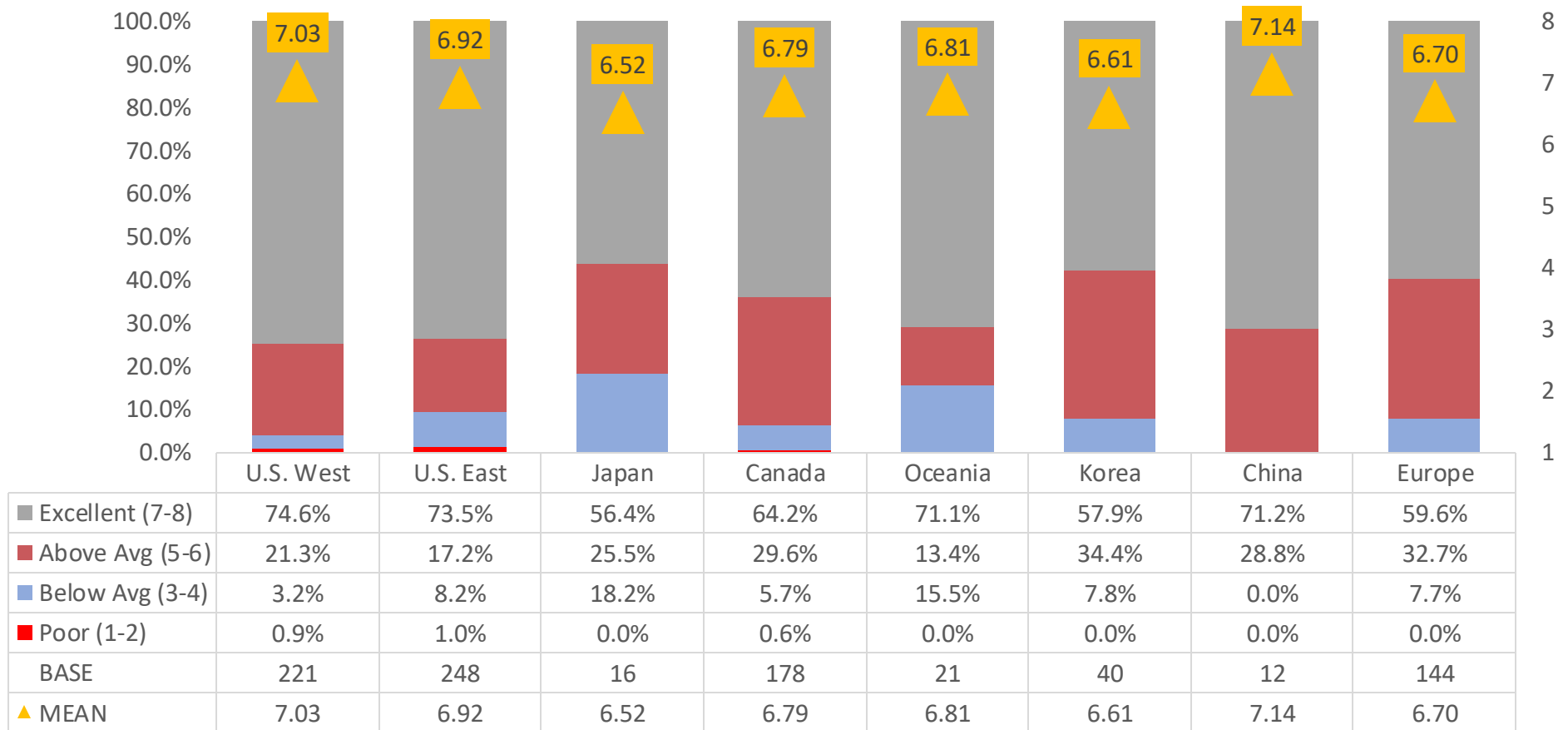
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



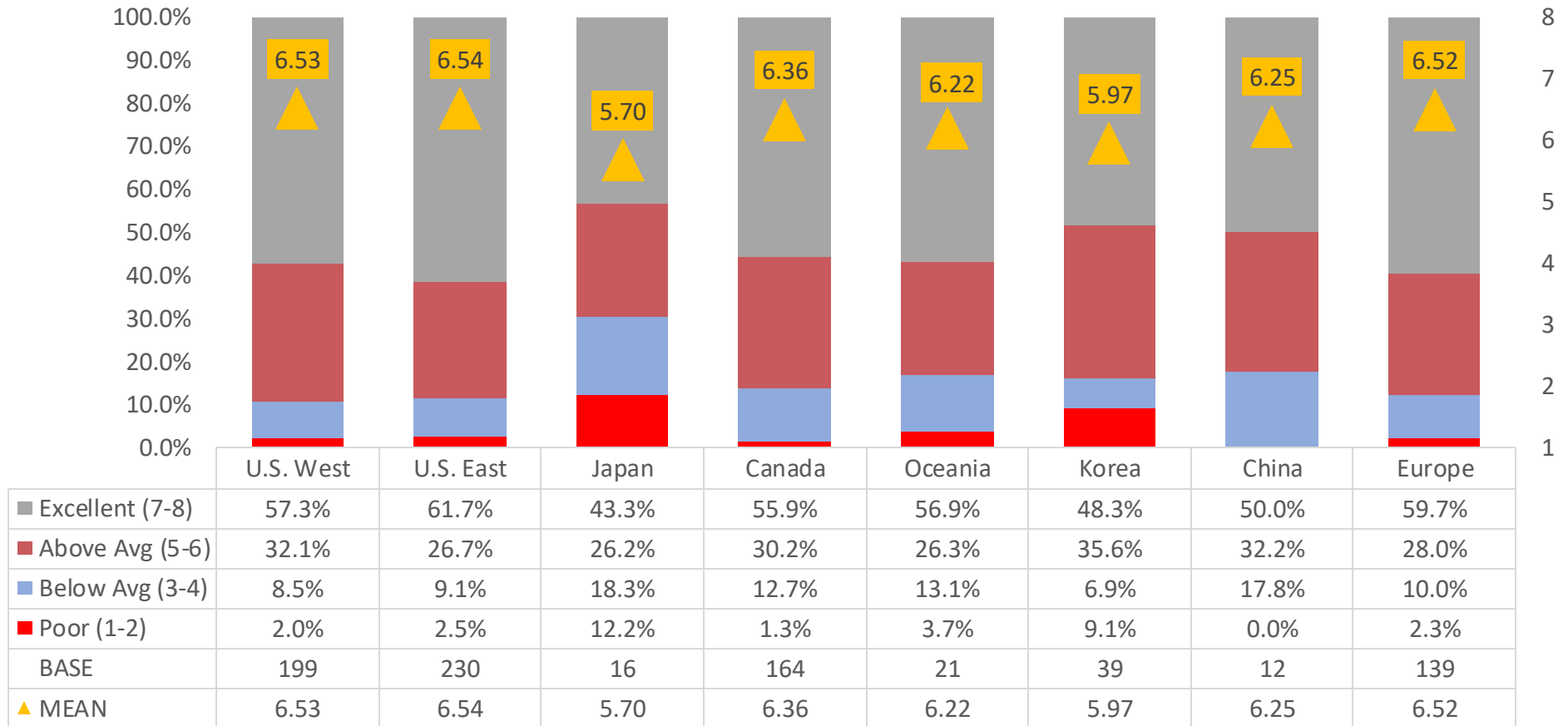
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



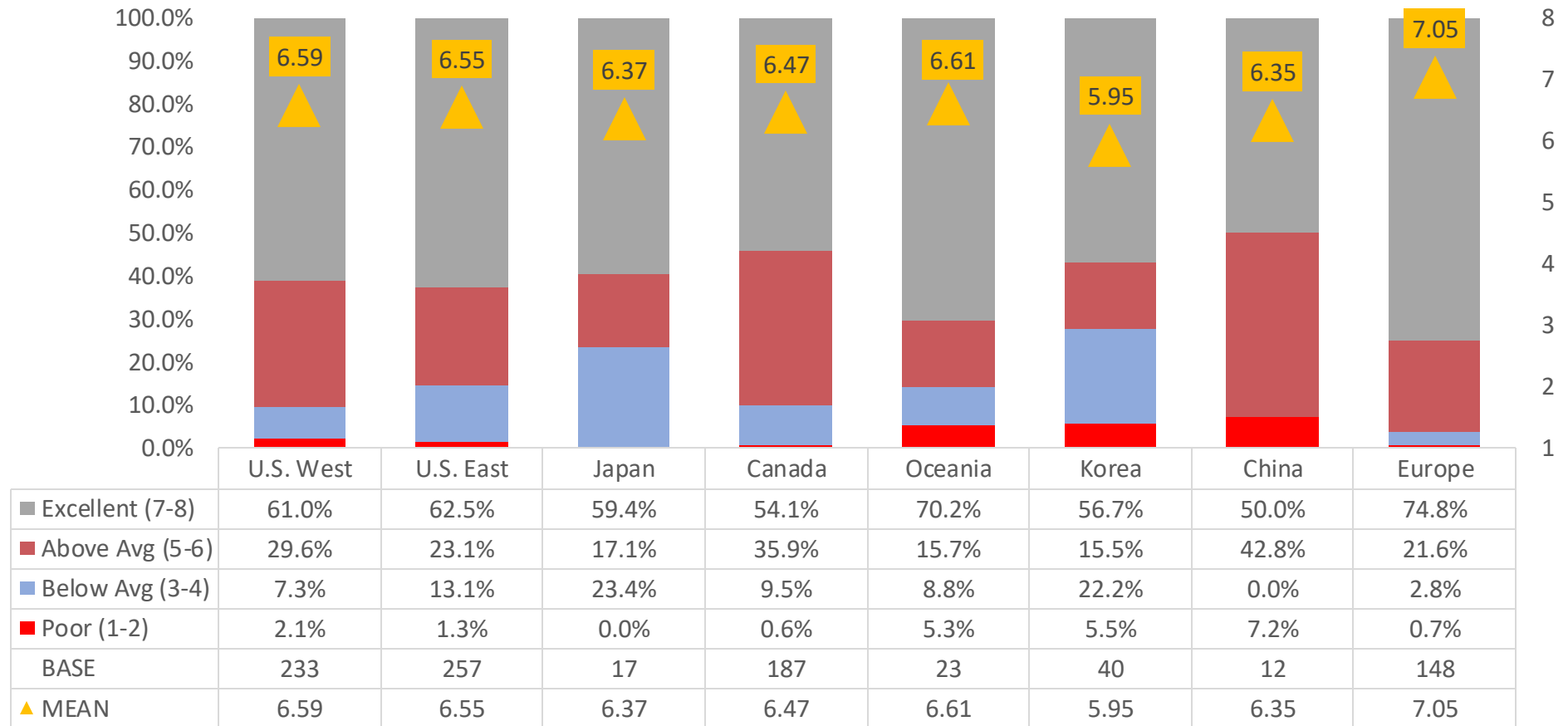
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI‘I

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



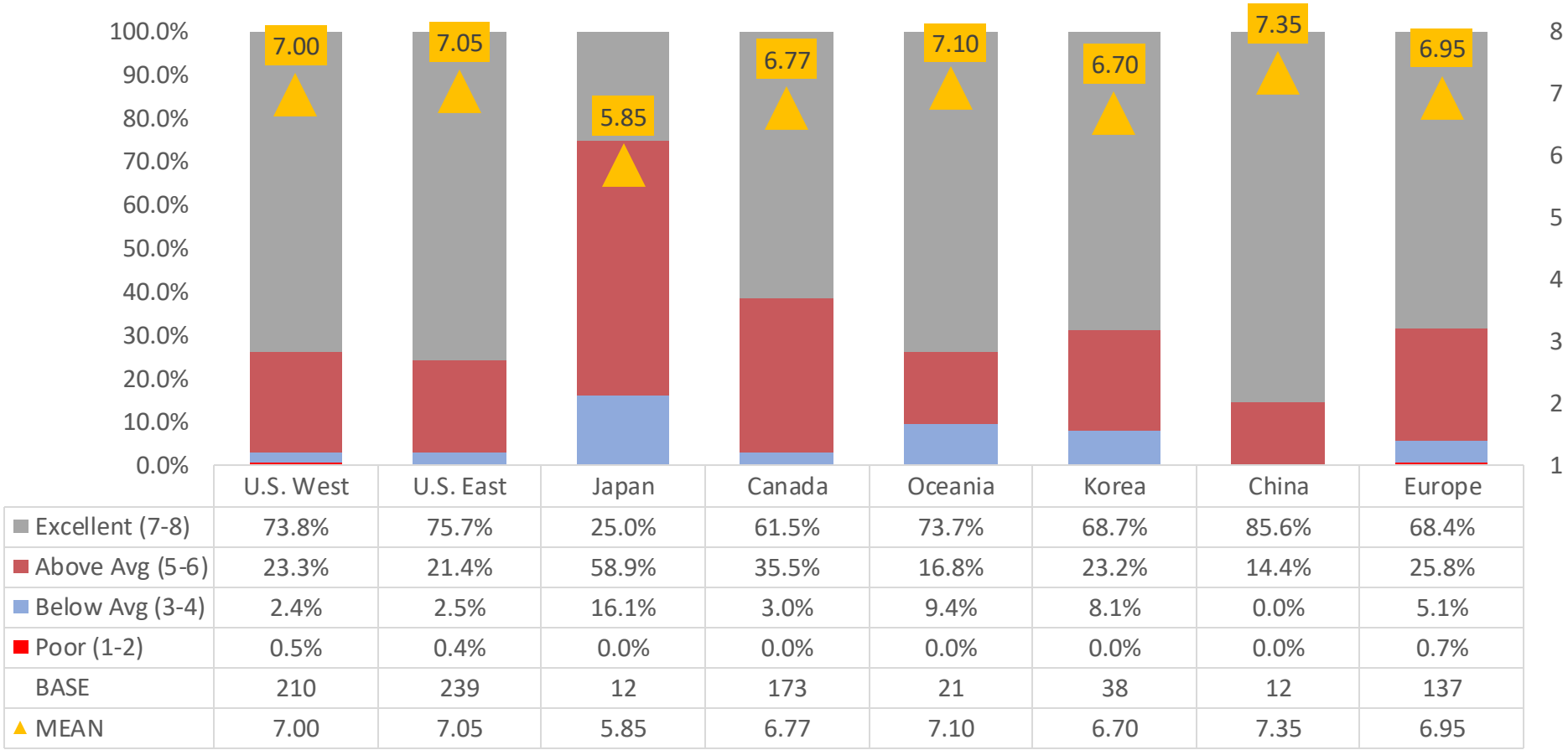
AIRPORT- ISLAND OF HAWAI‘I

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



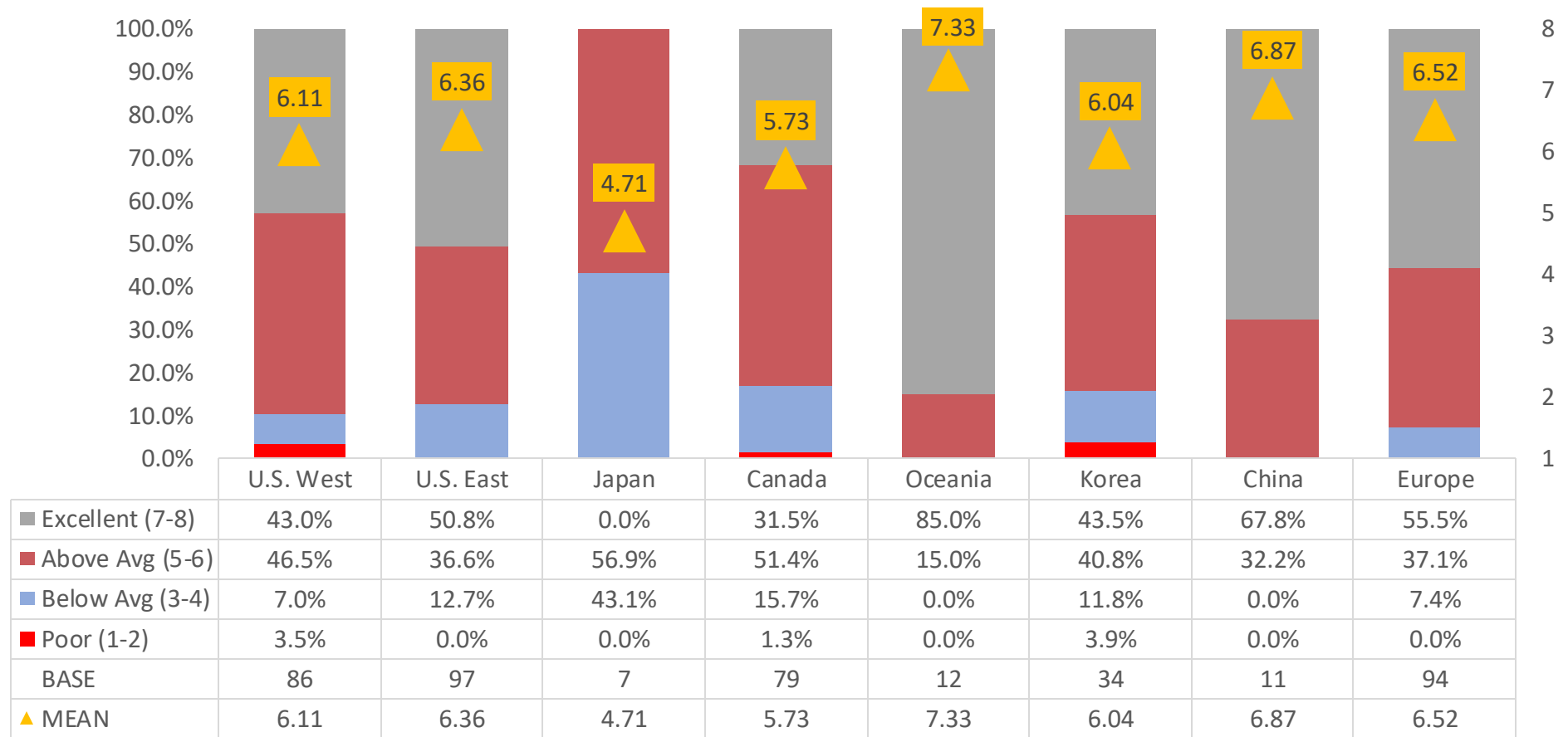
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



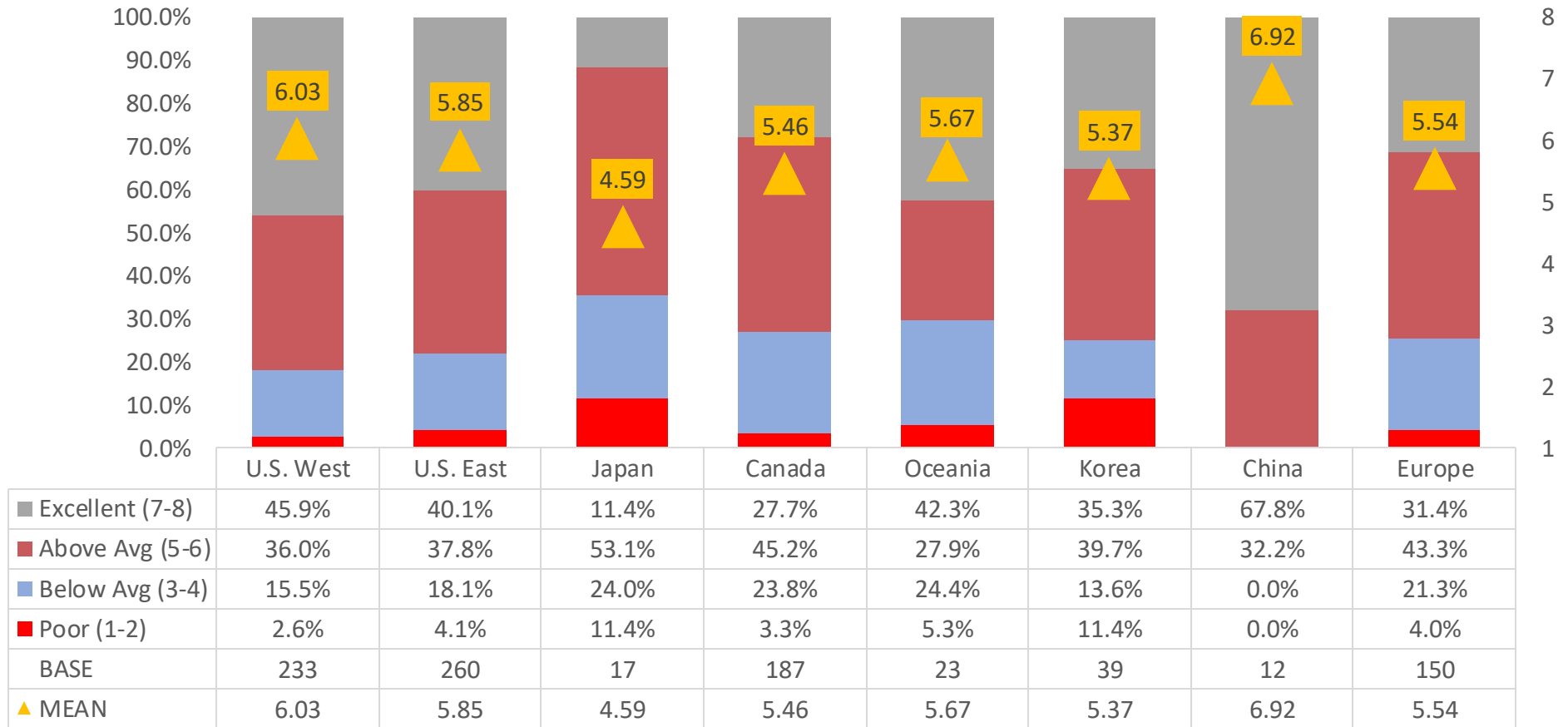
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



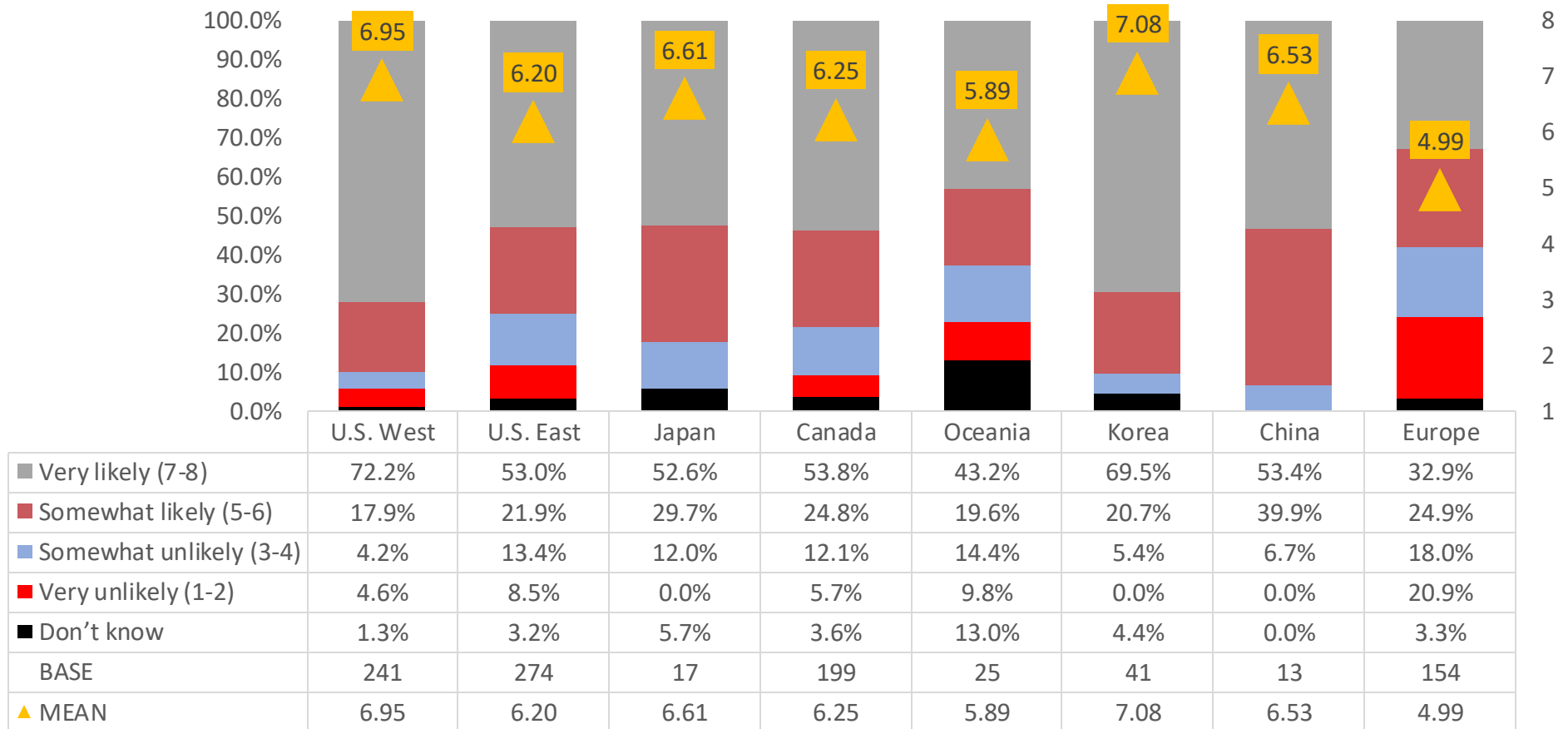
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

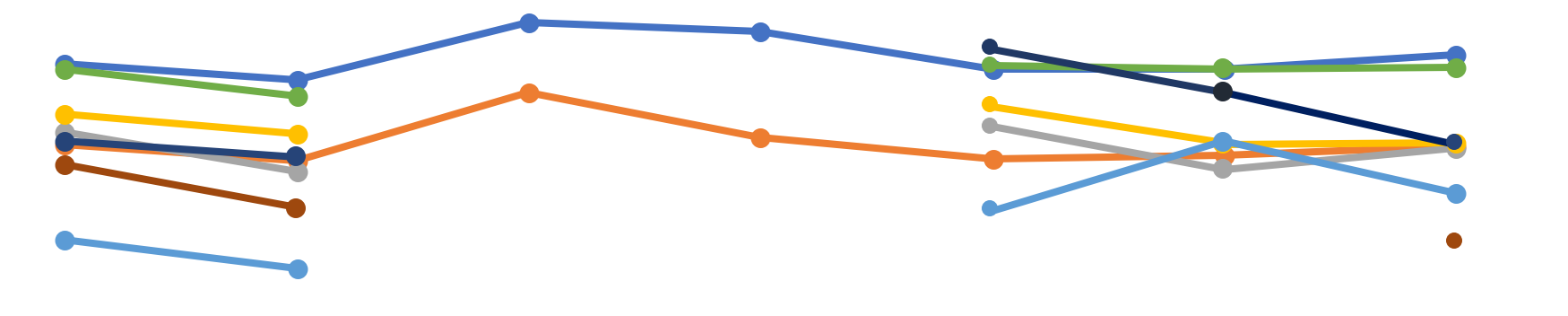
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

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



	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023	Q4 2024 P
U.S. West	70.4%	66.9%	79.0%	77.1%	69.2%	69.2%	72.2%
U.S. East	53.4%	49.9%	64.4%	54.7%	50.5%	51.0%	53.0%
Japan	56.0%	47.8%			57.1%	48.1%	52.6%
Canada	59.6%	55.7%			61.4%	53.6%	53.8%
Oceania	33.2%	27.1%			39.4%	54.0%	43.2%
Korea	69.1%	63.7%			69.9%	69.2%	69.5%
China	54.1%	50.7%			73.4%	64.4%	53.4%
Europe	49.3%	40.1%					32.9%

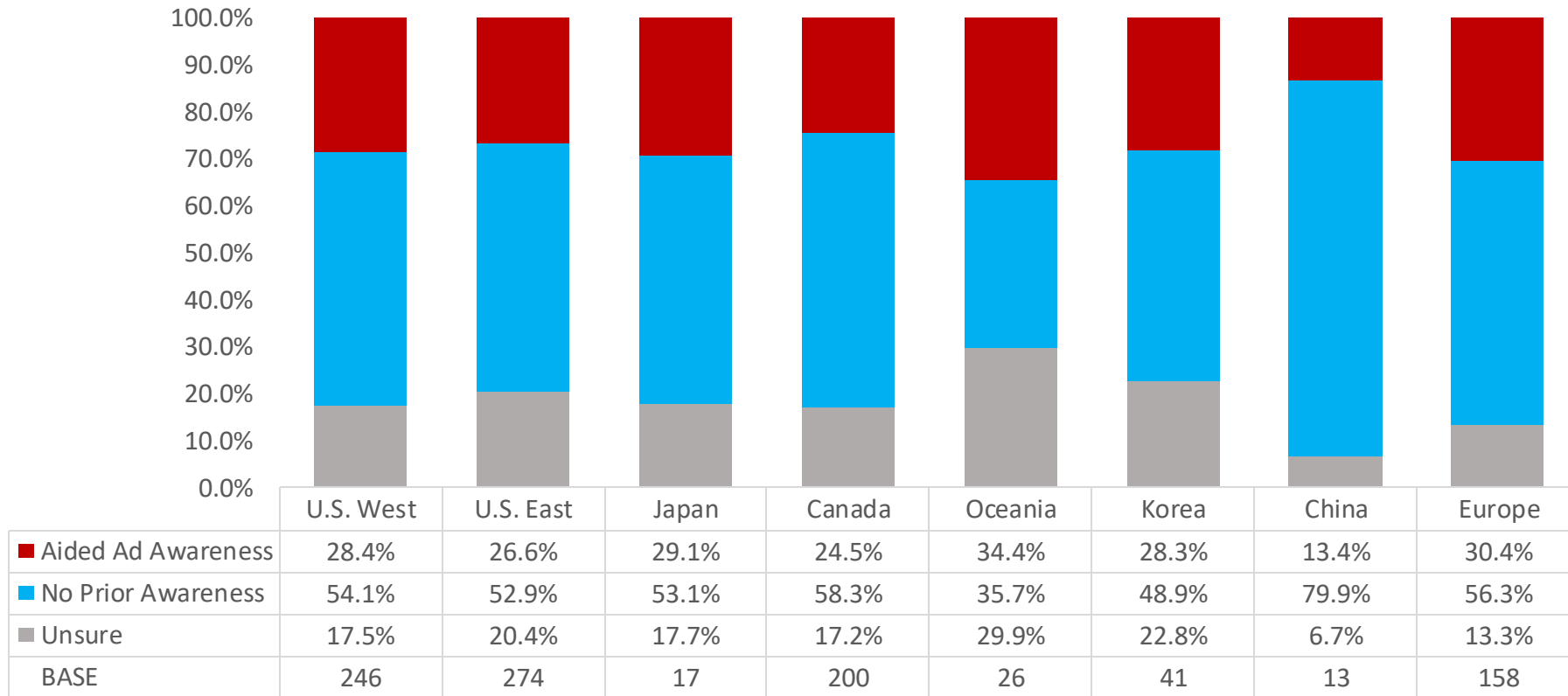
P= Preliminary Data

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.



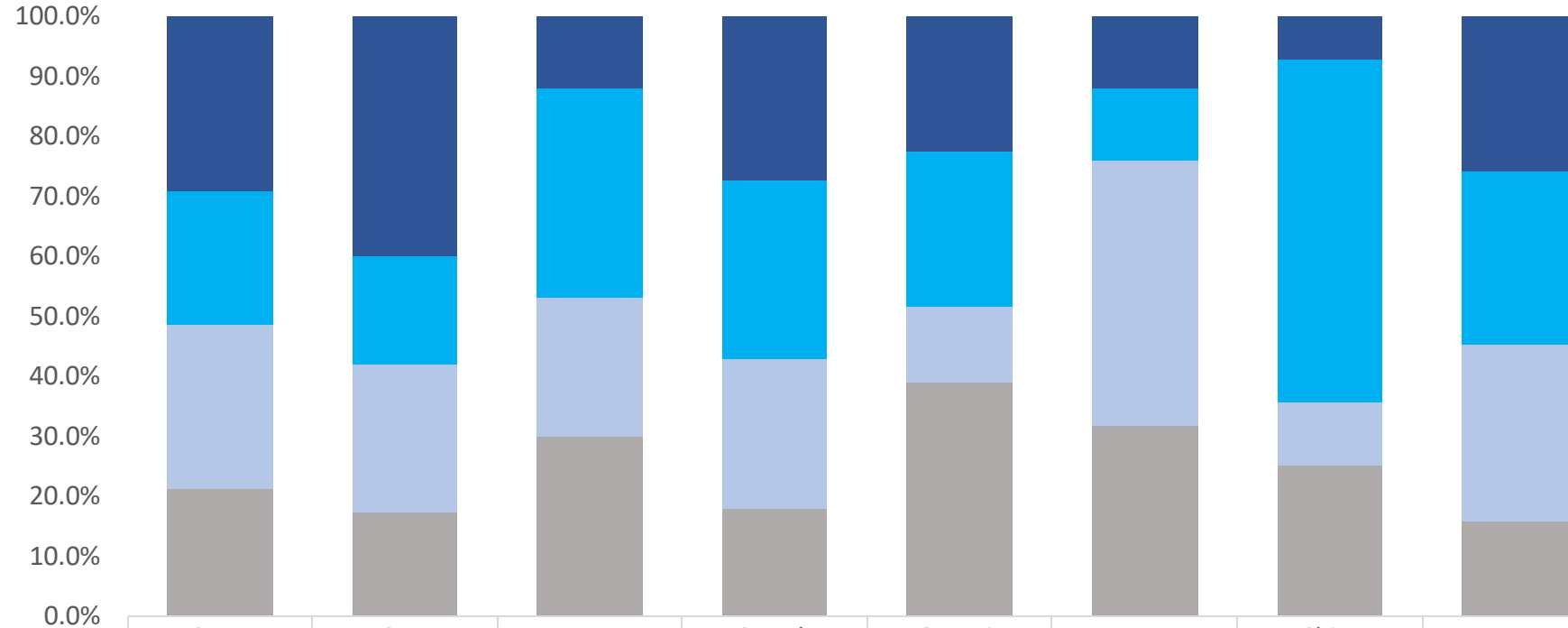
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

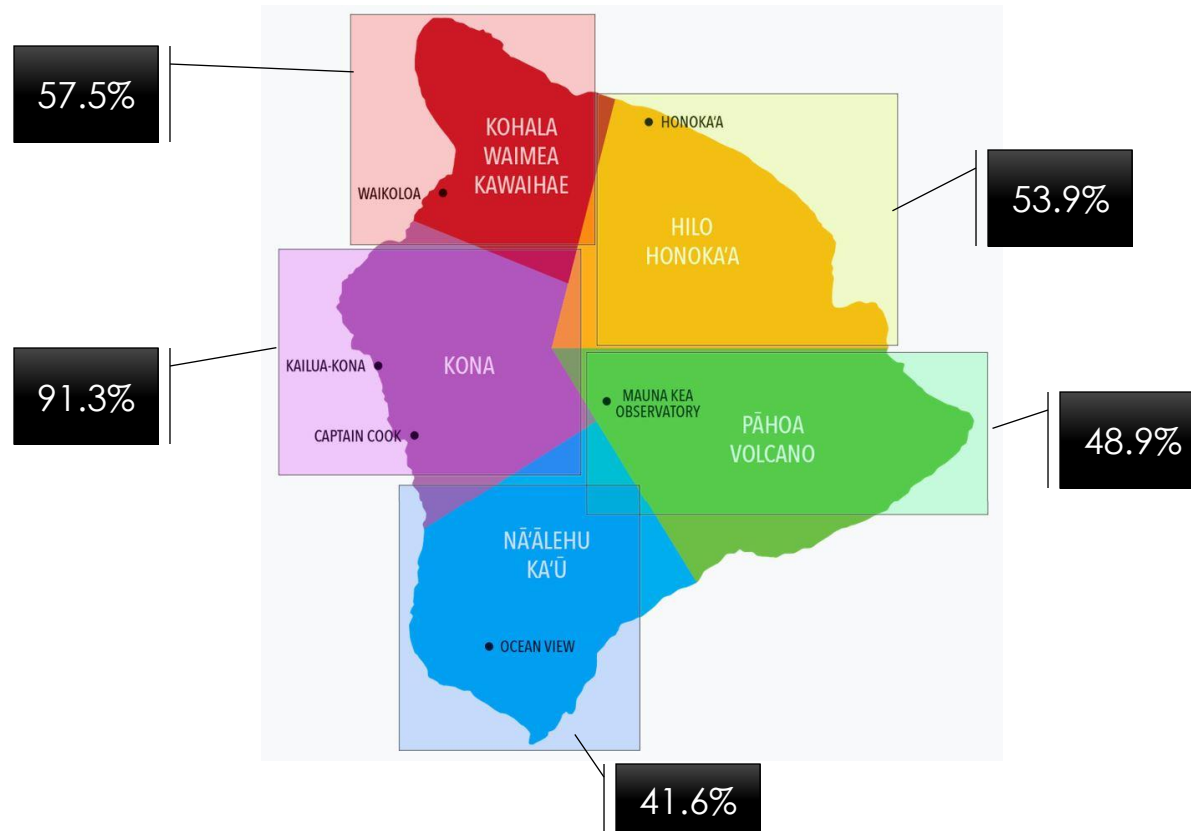
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	43.1%	50.3%	76.0%	51.3%	47.2%	56.9%	52.1%	58.1%
Outdoor or sporting activities and events	20.3%	14.8%	23.4%	21.6%	17.3%	30.0%	17.4%	31.2%
Social media posts and videos	11.4%	10.5%	24.0%	10.7%	10.9%	30.0%	33.7%	11.1%
Hawaiian cultural events	11.8%	12.8%	22.9%	13.1%	14.3%	6.7%	2.2%	12.7%
Television programs or movies filmed in Hawai'i	3.3%	8.7%	24.0%	11.3%	3.1%	9.9%	9.8%	18.6%
Hawaiian music	7.3%	8.0%	11.4%	10.7%	4.8%	6.7%	2.2%	5.7%
BASE	246	274	17	200	26	13	41	158

TRAVEL ON ISLAND OF HAWAI'I

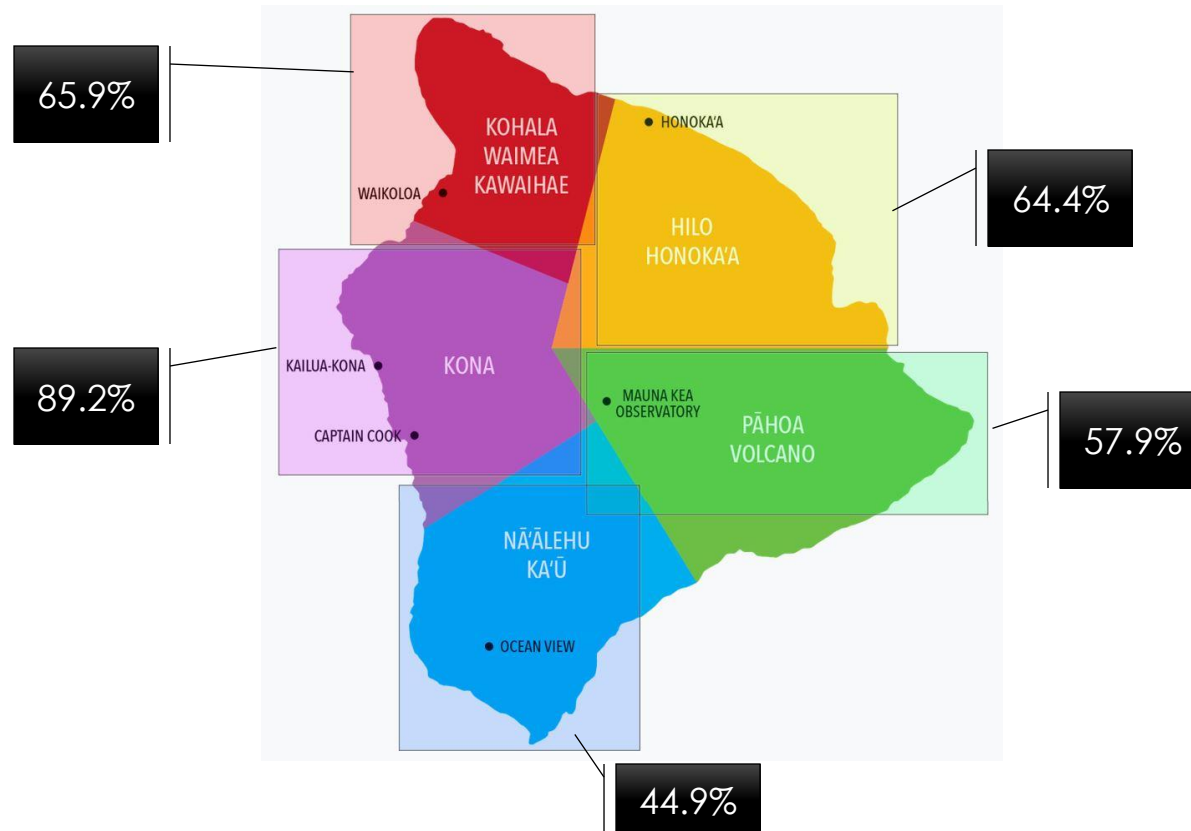


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
■ Traveled to other side of island	29.2%	40.1%	12.0%	27.5%	22.5%	12.0%	7.2%	25.8%
■ Traveled more than 1 hour one way to reach activities	22.4%	18.1%	34.9%	29.6%	25.8%	12.0%	57.2%	29.0%
■ Traveled 1 hour or less one way to reach activity	27.4%	24.6%	23.4%	25.0%	12.9%	44.5%	10.6%	29.6%
■ Enjoy activities- short drive from accommodations	21.0%	17.2%	29.7%	17.9%	38.7%	31.5%	25.0%	15.6%
● BASE	219	250	17	187	22	41	12	148

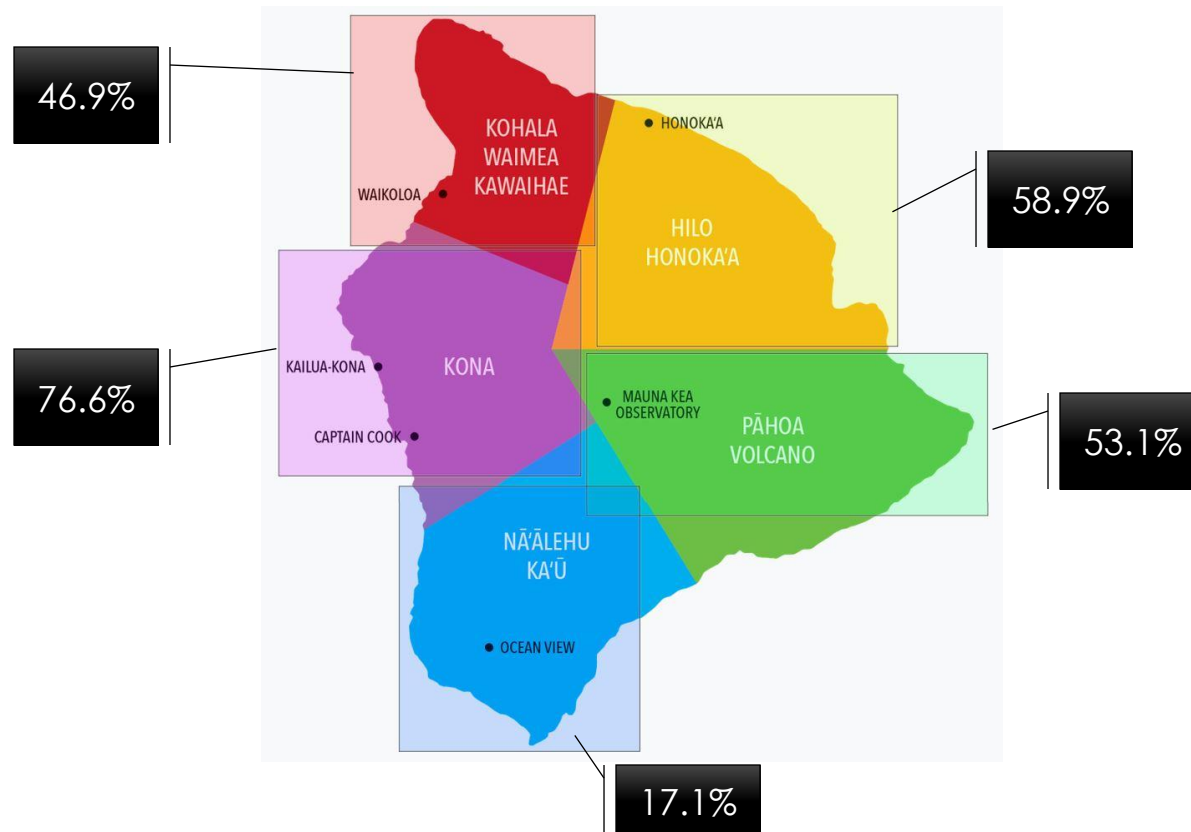
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



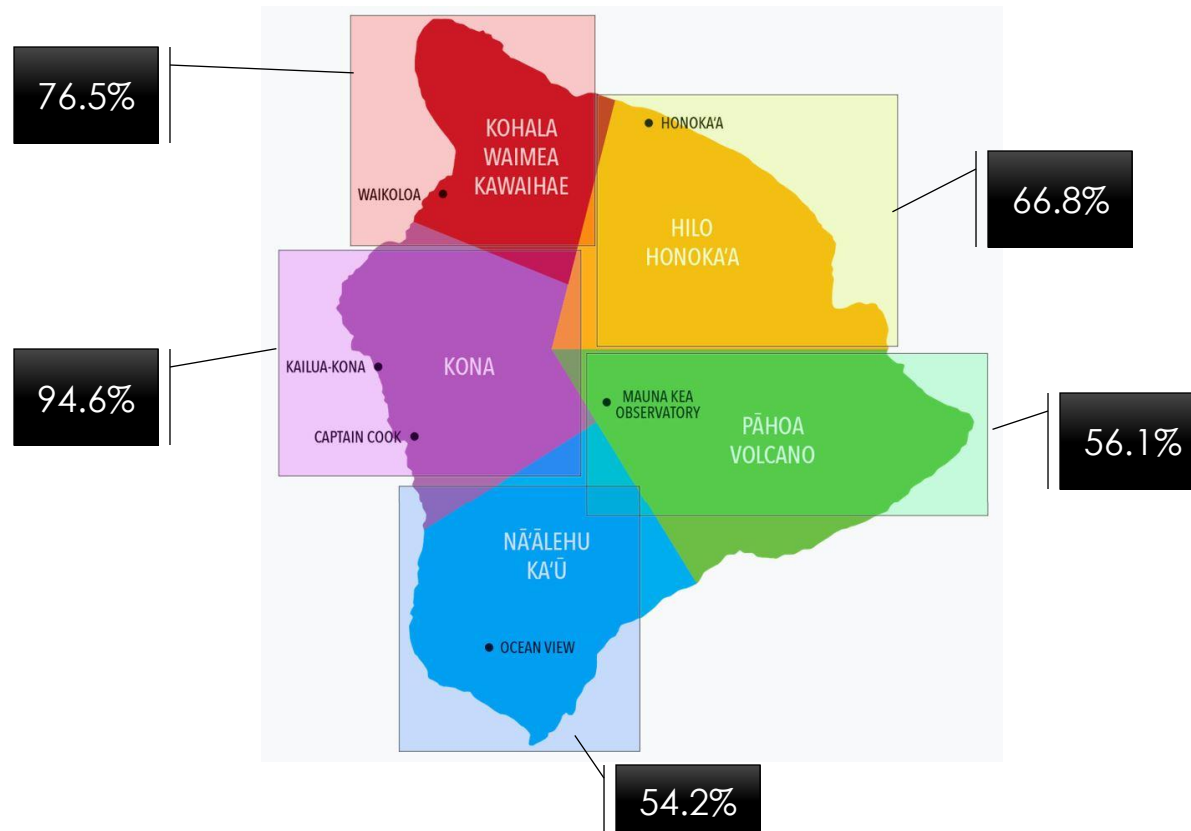
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



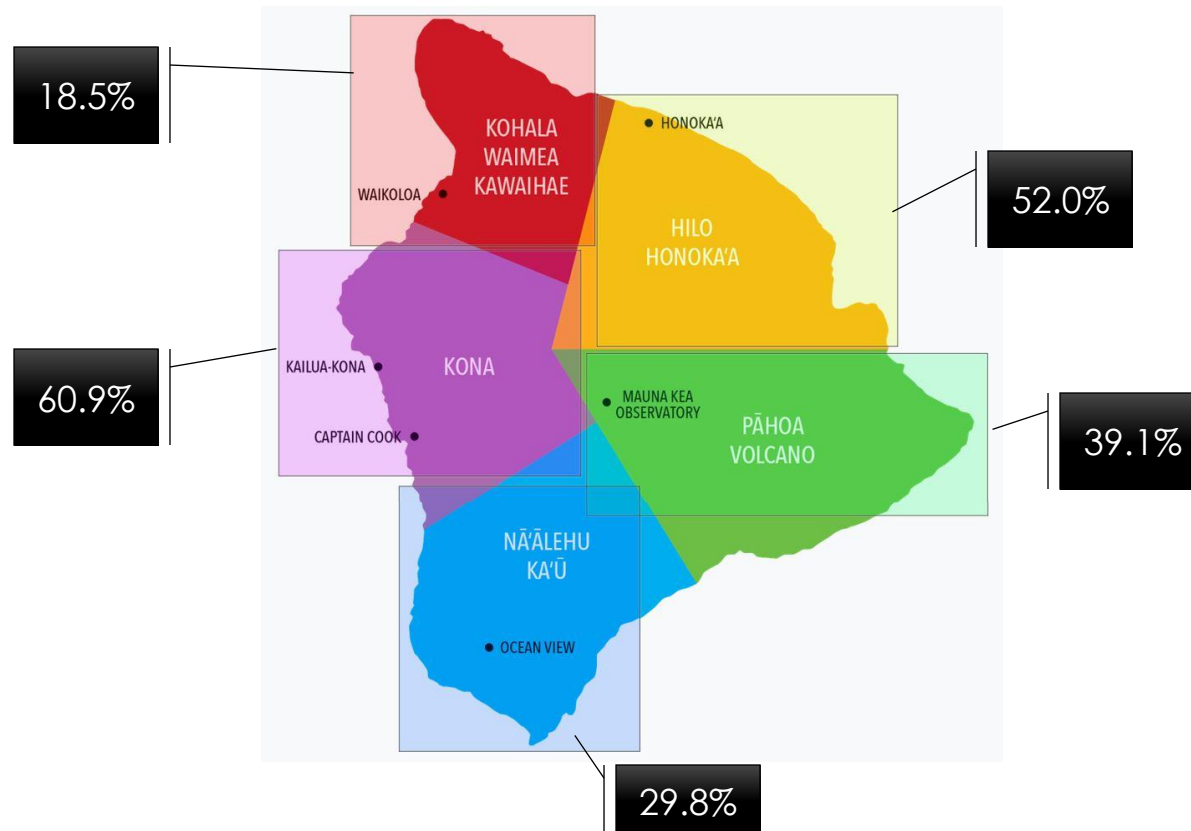
AREAS VISITED ISLAND OF HAWAI'I JAPAN



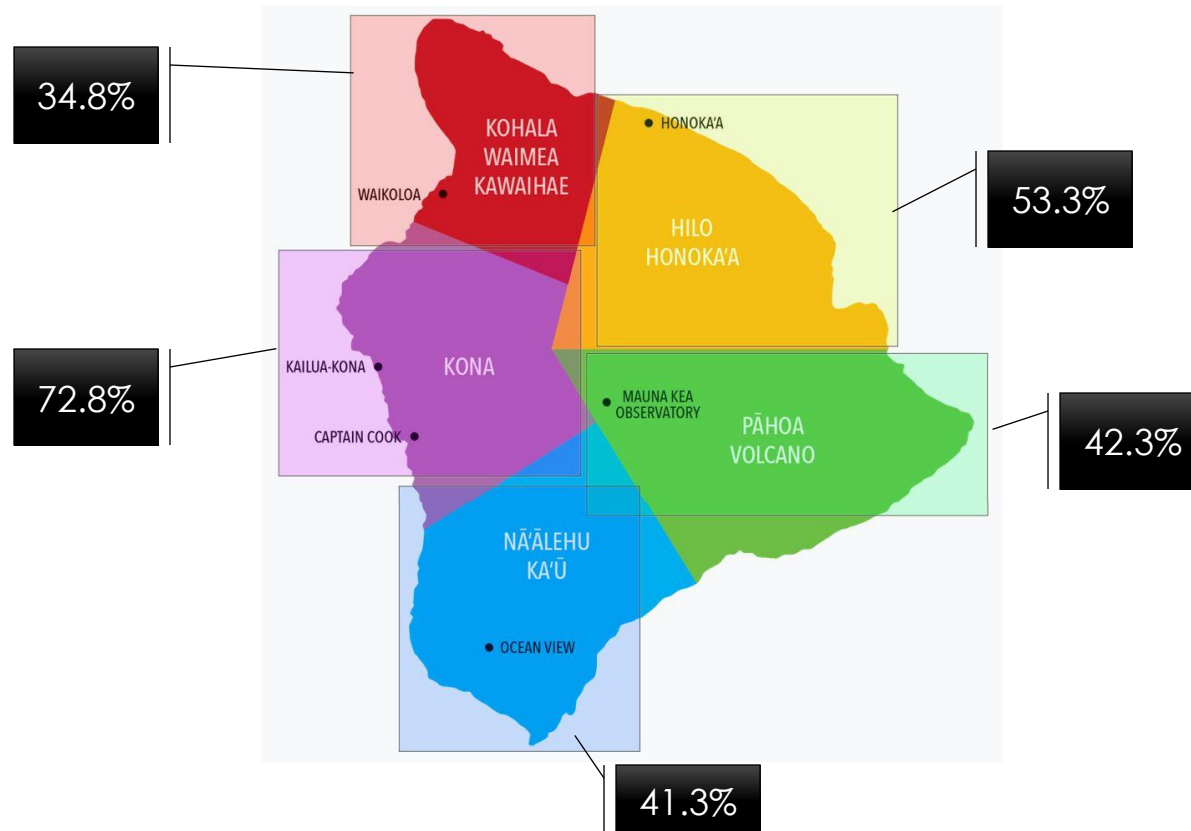
AREAS VISITED ISLAND OF HAWAI'I CANADA



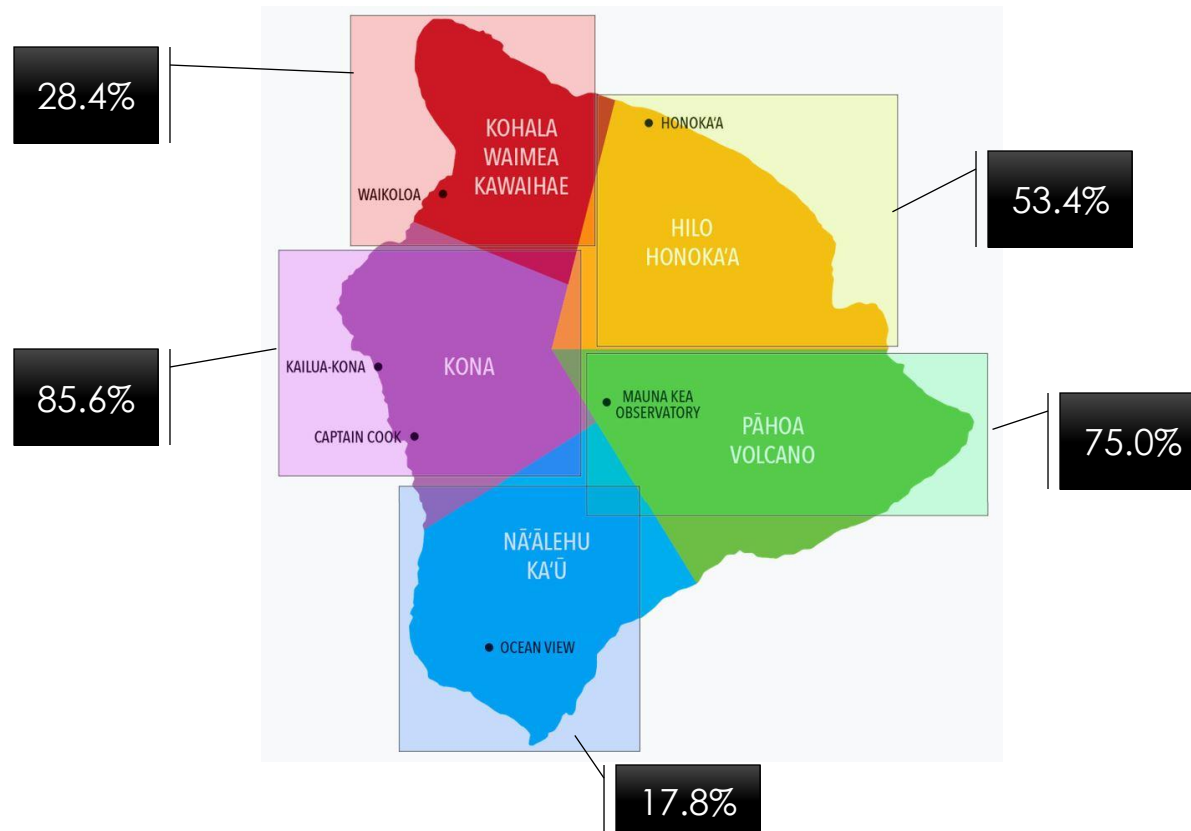
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



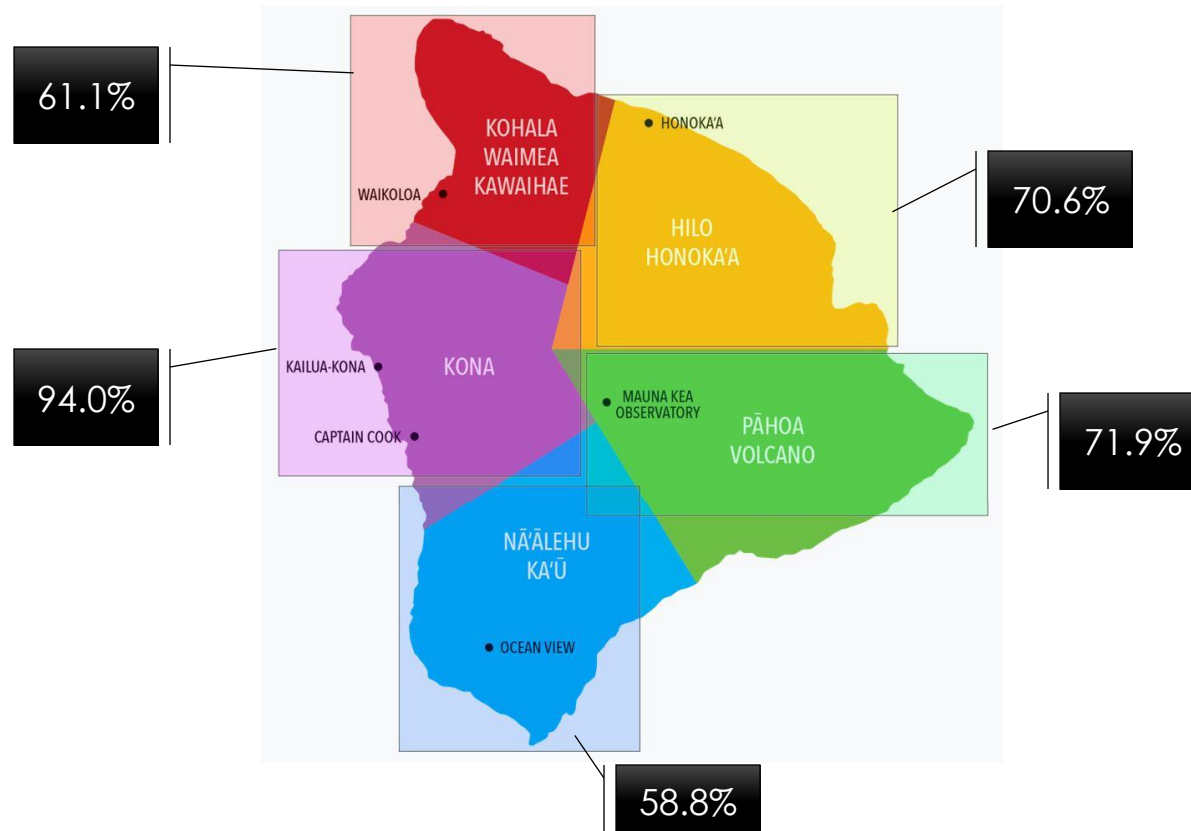
AREAS VISITED ISLAND OF HAWAI'I KOREA



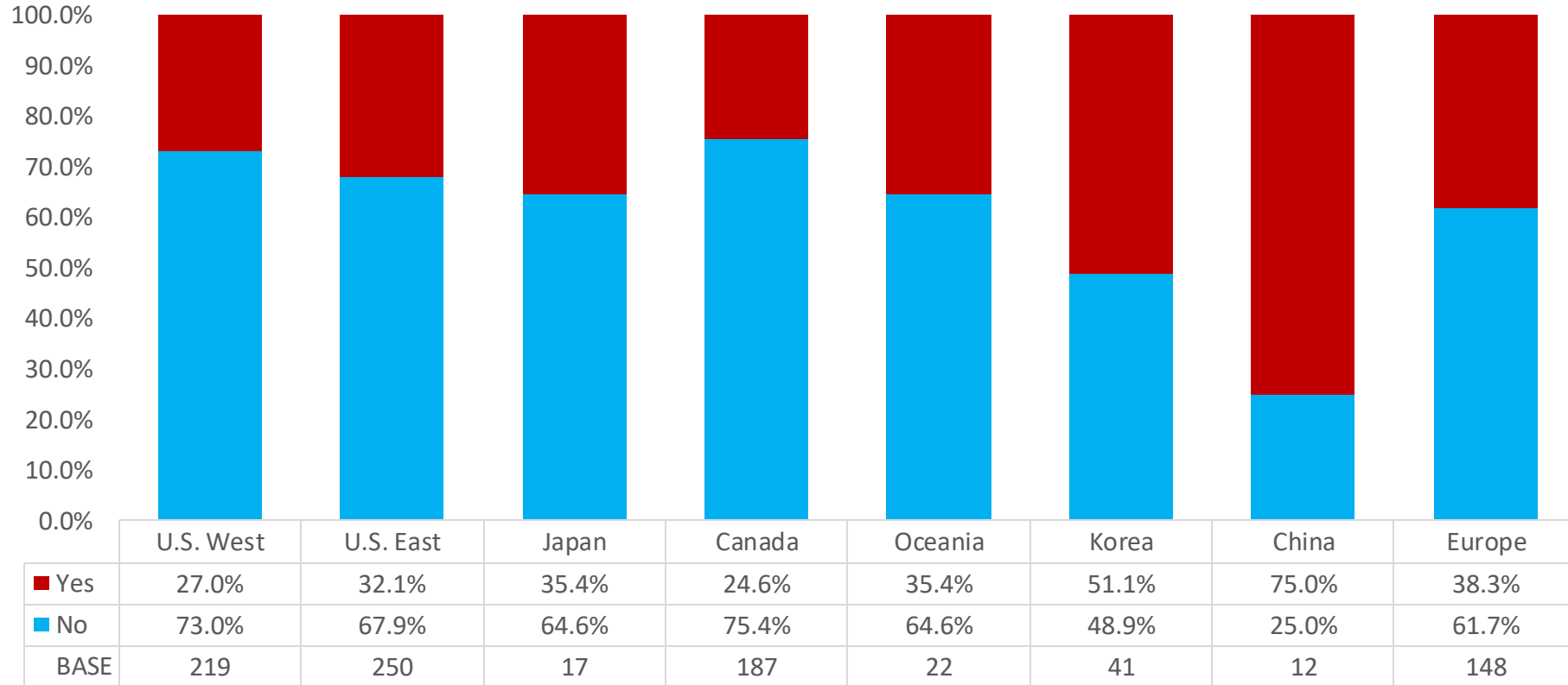
AREAS VISITED ISLAND OF HAWAI'I CHINA



AREAS VISITED ISLAND OF HAWAI'I EUROPE

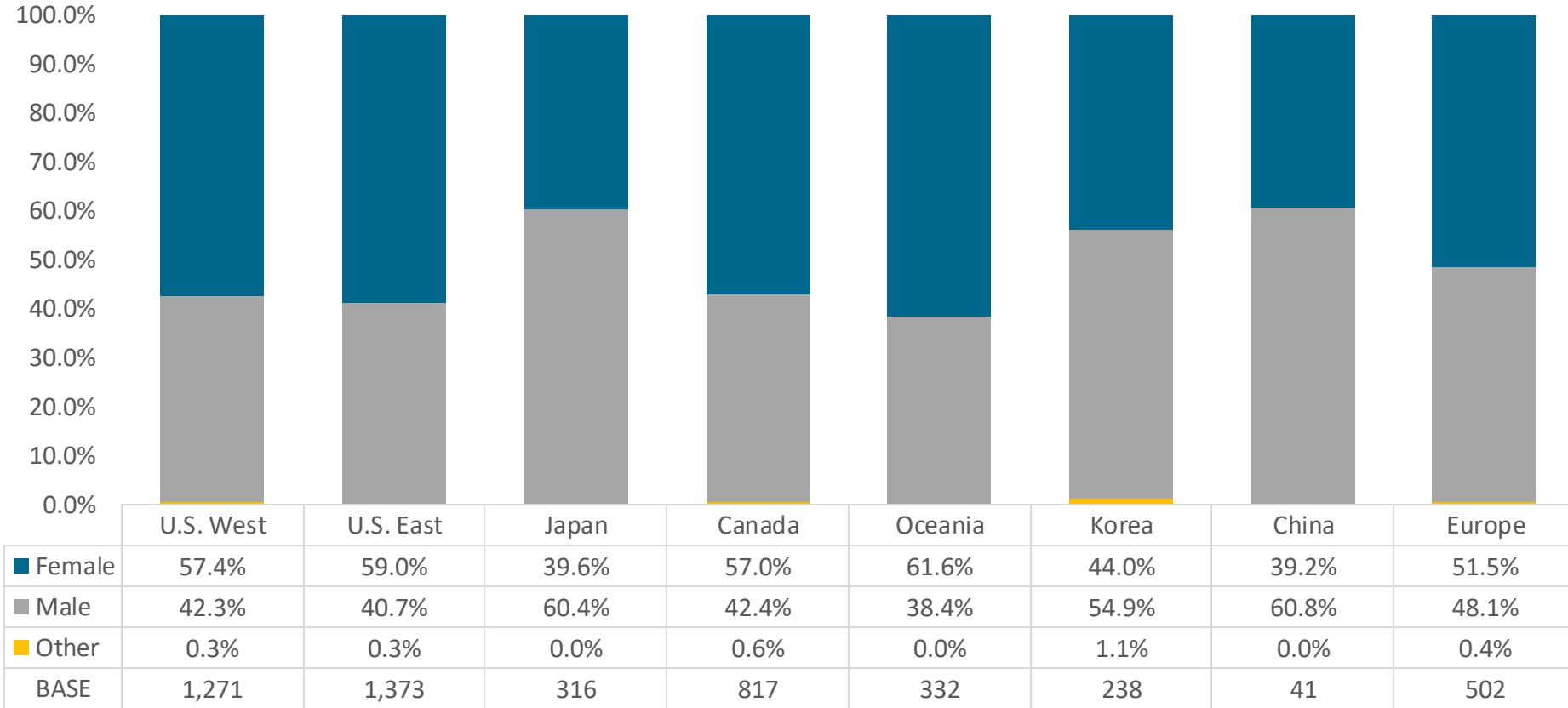


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

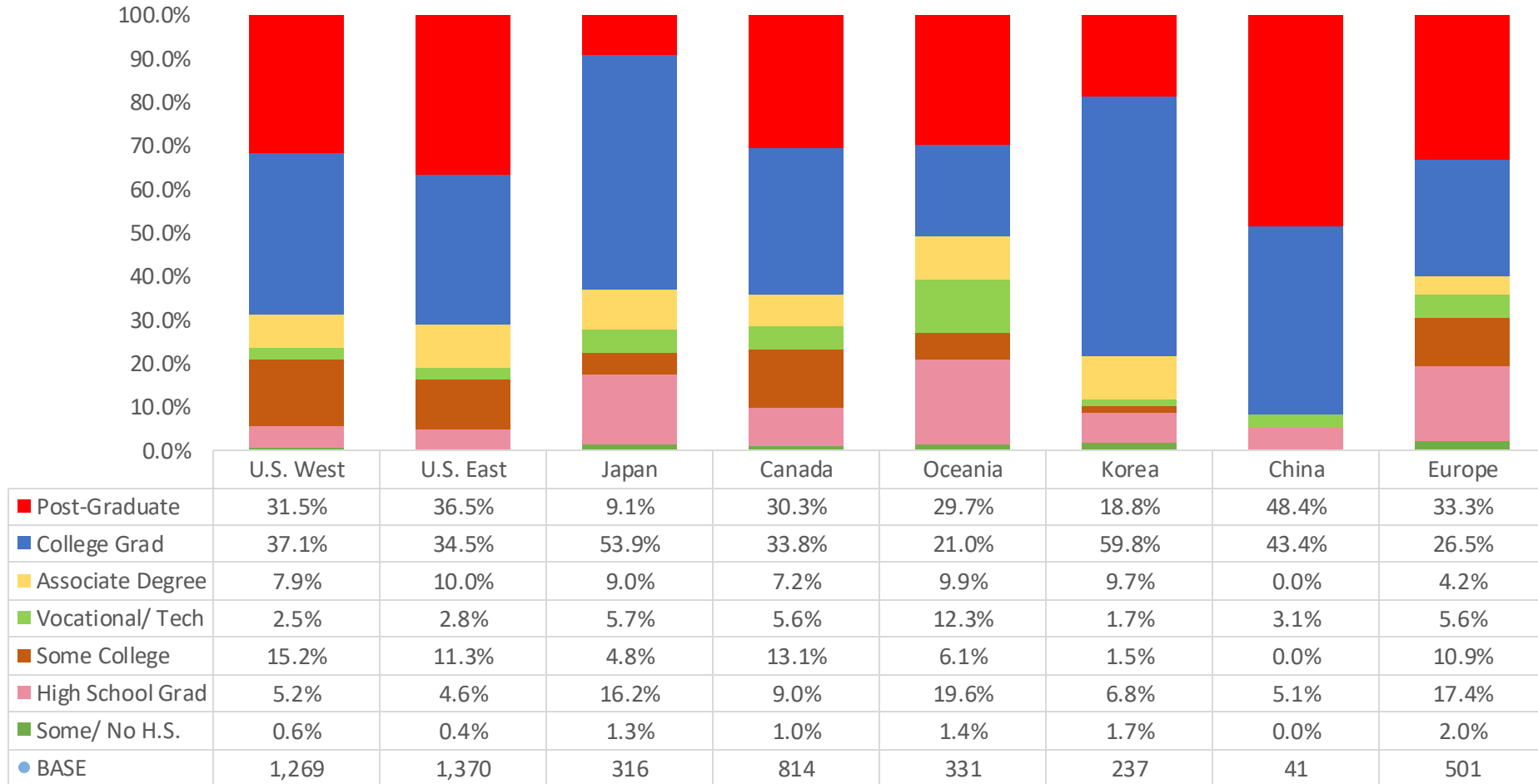


Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE - HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	5.2%	3.6%	3.3%	9.5%	13.6%
\$40,000 to \$59,999	4.2%	5.9%	6.4%	8.4%	13.5%
\$60,000 to \$79,999	7.2%	7.0%	9.3%	11.5%	15.9%
\$80,000 to \$99,999	8.1%	9.7%	11.1%	9.4%	14.2%
\$100,000 to \$124,999	13.6%	13.4%	16.3%	10.5%	11.4%
\$125,000 to \$149,999	10.5%	12.7%	10.9%	13.5%	8.0%
\$150,000 to \$174,999	10.2%	10.2%	9.4%	9.1%	8.5%
\$175,000 to \$199,999	9.3%	7.1%	7.9%	9.6%	5.4%
\$200,000 to \$249,999	10.4%	10.8%	9.6%	9.1%	4.4%
\$250,000 +	21.3%	19.6%	15.9%	9.5%	5.2%

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	10.0%
¥3.5 - ¥4.5 million	10.5%
¥4.5 - ¥5.5 million	10.4%
¥5.5 - ¥6.5 million	6.7%
¥6.5 - ¥7.5 million	6.8%
¥7.5 - ¥8.5 million	8.5%
¥8.5 - ¥10.0 million	11.6%
¥10.0 - ¥15.0 million	18.9%
¥15.0 - ¥20.0 million	7.4%
¥20.0 million +	9.2%

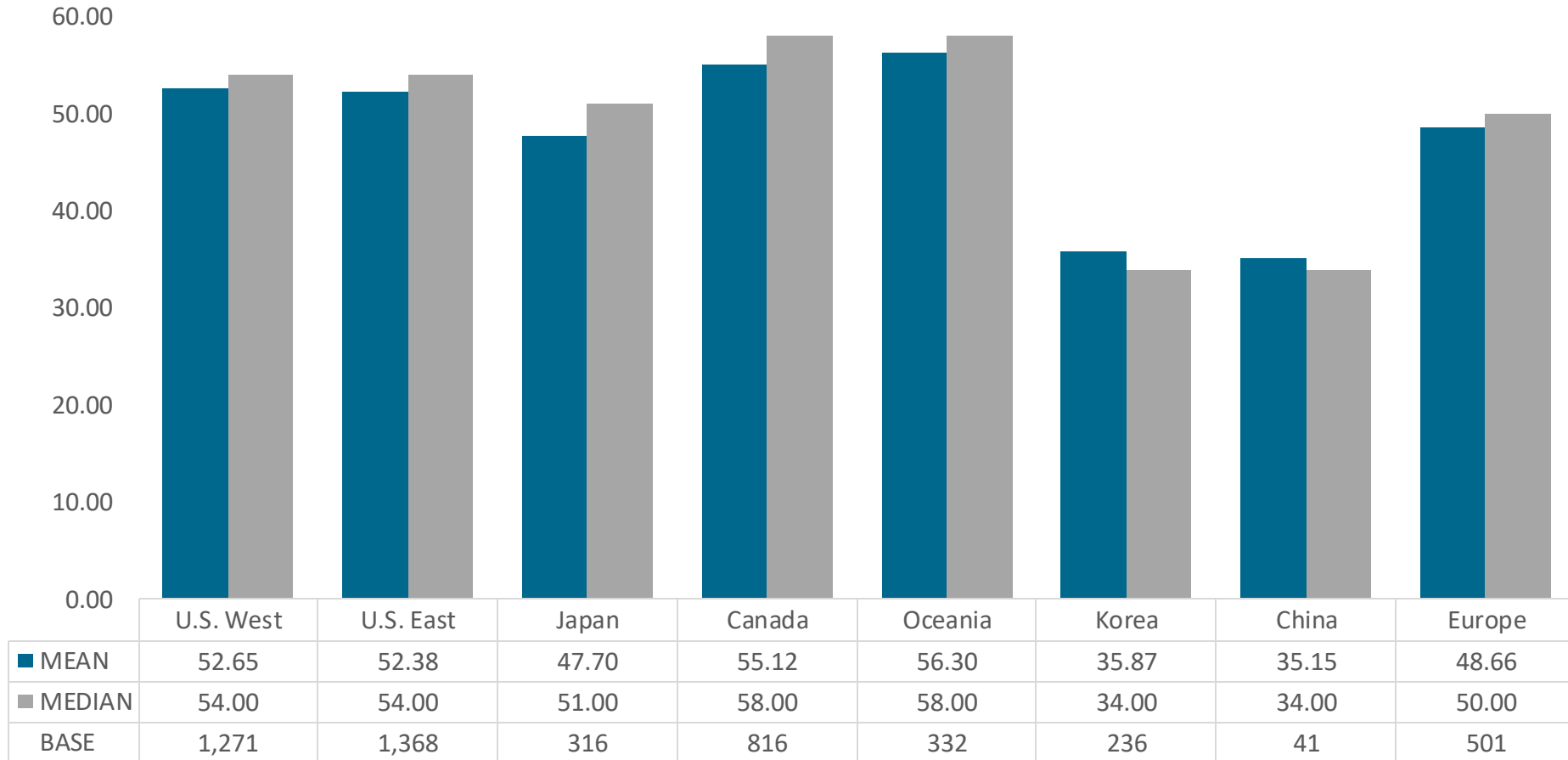
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	8.3%
₩16,305,000 - ₩27,173,999	6.3%
₩27,174,000 - ₩38,041,999	8.3%
₩38,042,000 - ₩48,911,999	10.9%
₩48,912,000 - ₩59,781,999	8.3%
₩59,782,000 - ₩70,652,999	8.7%
₩70,653,000 - ₩81,520,999	10.3%
₩81,521,000 - ₩92,390,999	5.1%
₩92,391,000 - ₩103,259,999	9.6%
₩103,260,000 - ₩149,999,999	13.6%
₩150,000,000 - ₩199,999,999	1.8%
₩200,000,000+	8.6%

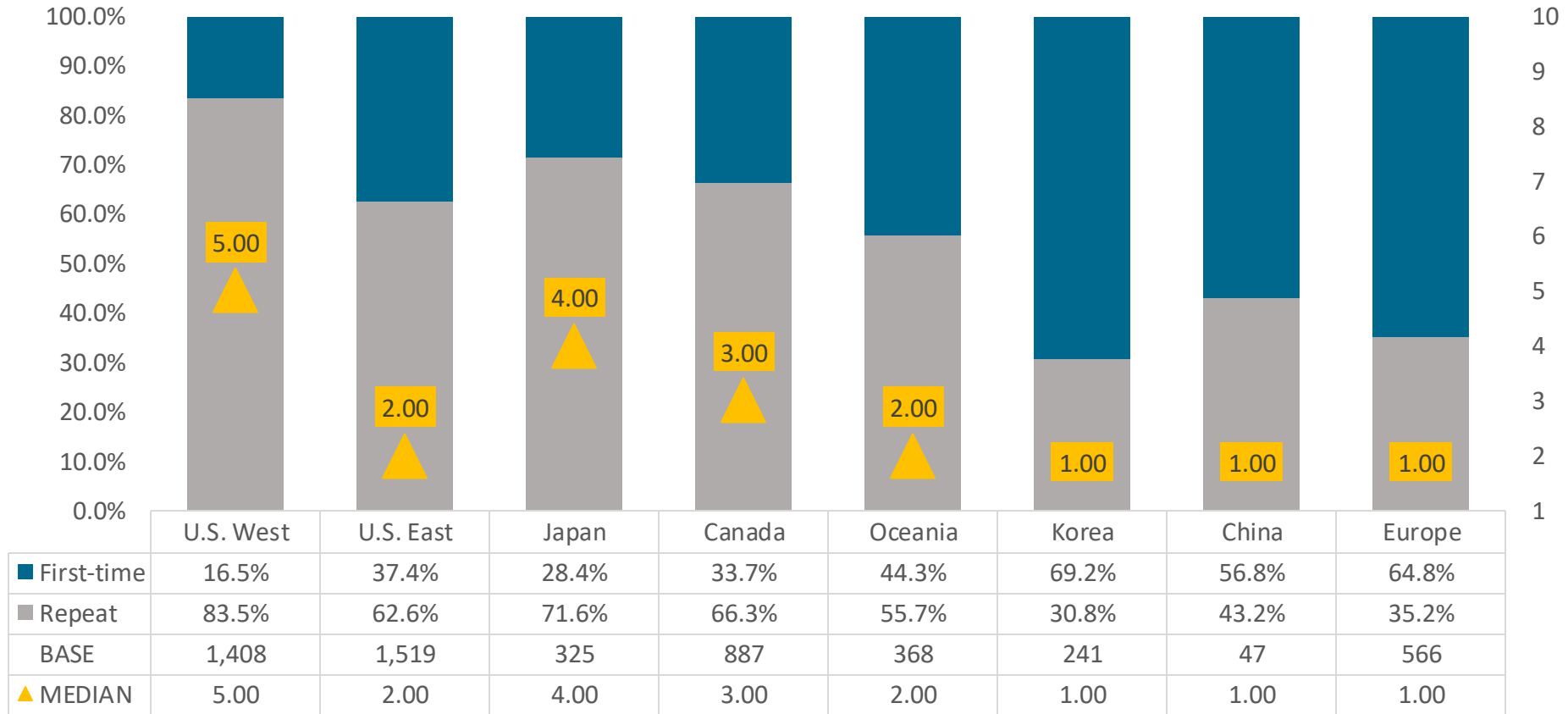
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	4.2%
¥250,800 – ¥376,099	31.9%
¥376,100 – ¥501,399	12.4%
¥501,400 – ¥626,799	-
¥626,800 – ¥783,499	4.2%
¥783,500 – ¥940,199	7.2%
¥940,200 – ¥1,096,899	7.2%
¥1,096,900 - ¥1,253,599	7.2%
¥1,253,600 – ¥1,560,799	7.2%
¥1,560,800+	18.5%

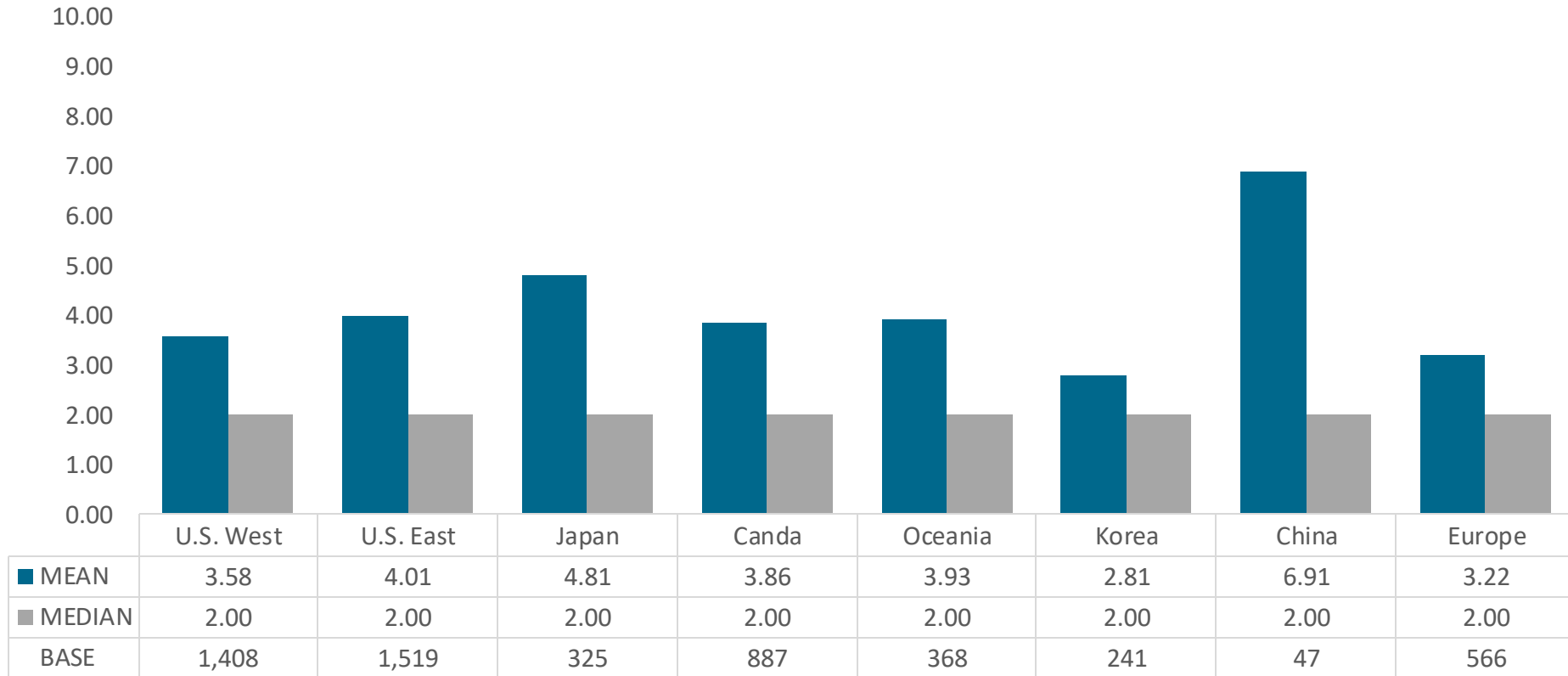
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
My spouse	57.9%	53.1%	61.4%	64.0%	62.5%	69.6%	30.9%	46.2%
Other adult members of my family	28.8%	28.6%	18.9%	25.8%	23.0%	14.6%	29.9%	18.0%
My child(ren)/ grandchild(ren) under 18	22.4%	15.8%	11.5%	14.2%	20.3%	15.7%	7.2%	10.5%
My friends/ associates	16.7%	15.2%	16.1%	16.1%	13.4%	7.1%	28.3%	14.9%
Myself only (traveled alone/ no one else)	10.1%	14.1%	12.7%	6.6%	11.3%	7.9%	15.4%	18.5%
My girlfriend/ boyfriend	6.2%	6.4%	1.5%	6.0%	2.5%	2.4%	11.0%	10.3%
Same gender partner	1.6%	1.0%	0.0%	1.0%	0.2%	0.4%	3.7%	1.7%

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	654	3.83
U.S. East	914	3.24
Japan	319	5.49
Canada	408	4.85
Oceania	352	5.22
Korea	227	6.50
China	39	15.69
Europe	438	4.68
All MMAs	3,351	1.69

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



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

MMA	Completed	Margin of Error +
U.S. West	223	6.56
U.S. East	289	5.76
Japan	3	56.58
Canada	206	6.83
Oceania	29	18.20
Korea	5	43.83
China	3	56.58
Europe	127	8.70
All MMAs	885	3.29

* 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	379	5.03
U.S. East	438	4.68
Japan	4	49.00
Canada	336	5.35
Oceania	31	17.60
Korea	16	24.50
China	6	40.01
Europe	196	7.00
All MMAs	1,406	2.61

* 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	256	6.13
U.S. East	338	5.33
Japan	17	23.77
Canada	260	6.08
Oceania	38	15.90
Korea	42	15.12
China	15	25.30
Europe	211	6.75
All MMAs	1,177	2.86

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

