



VISITOR SATISFACTION STUDY QUARTER 1, 2025

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 1, 2025 report include survey results from: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, Europe, Korea and China.

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	1,707	2.37	7.18
U.S. East	1,096	2.96	6.22
Japan	216	6.67	17.16
Canada	598	4.01	12.43
Oceania	138	8.34	7.32
China	61	12.55	5.63
Korea	232	6.43	31.18
Europe	248	6.22	8.51
All visitor markets	4,296	1.50	7.94

Survey Methodology (cont.)

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

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 1, 2025. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

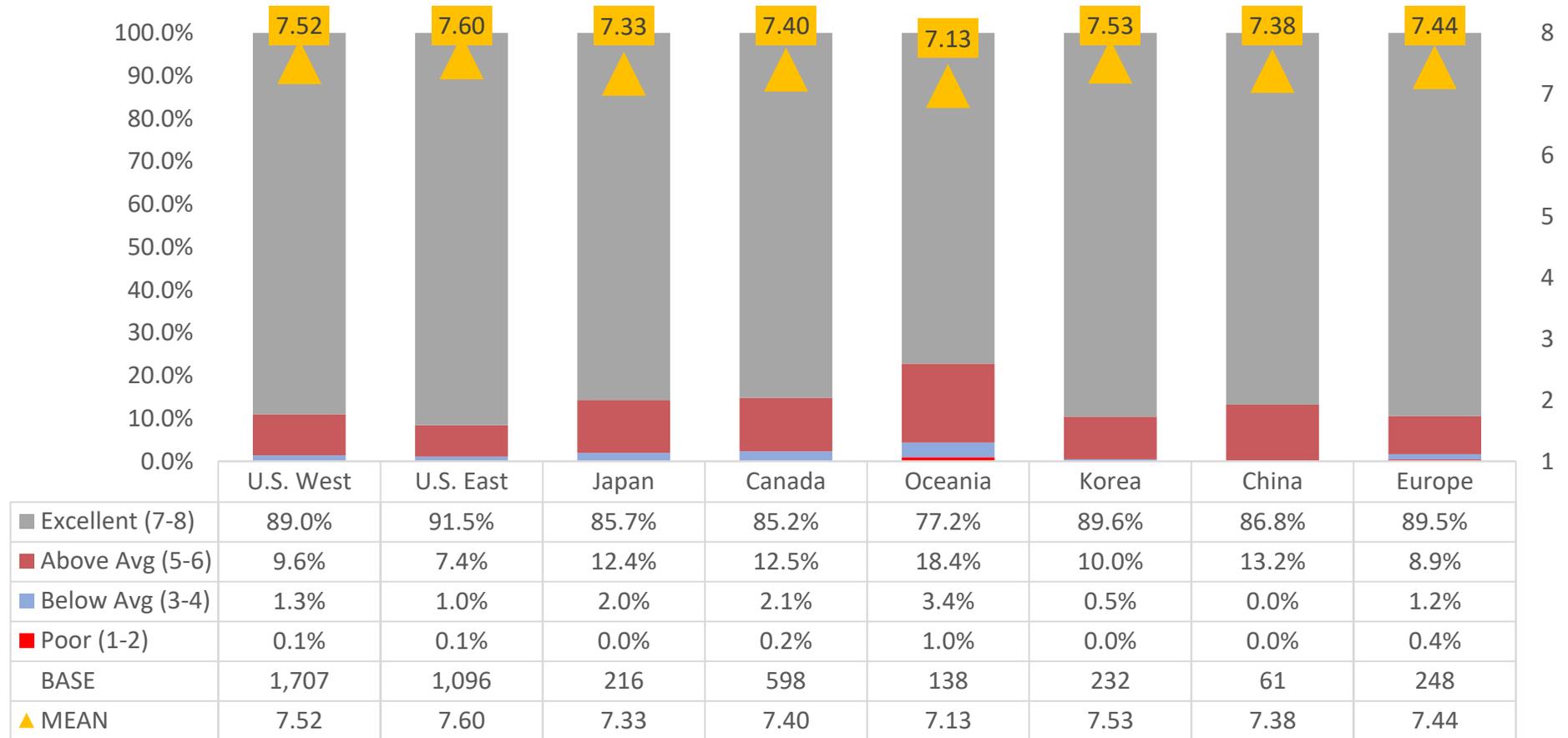
Data for 2025 and 2024 are preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

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

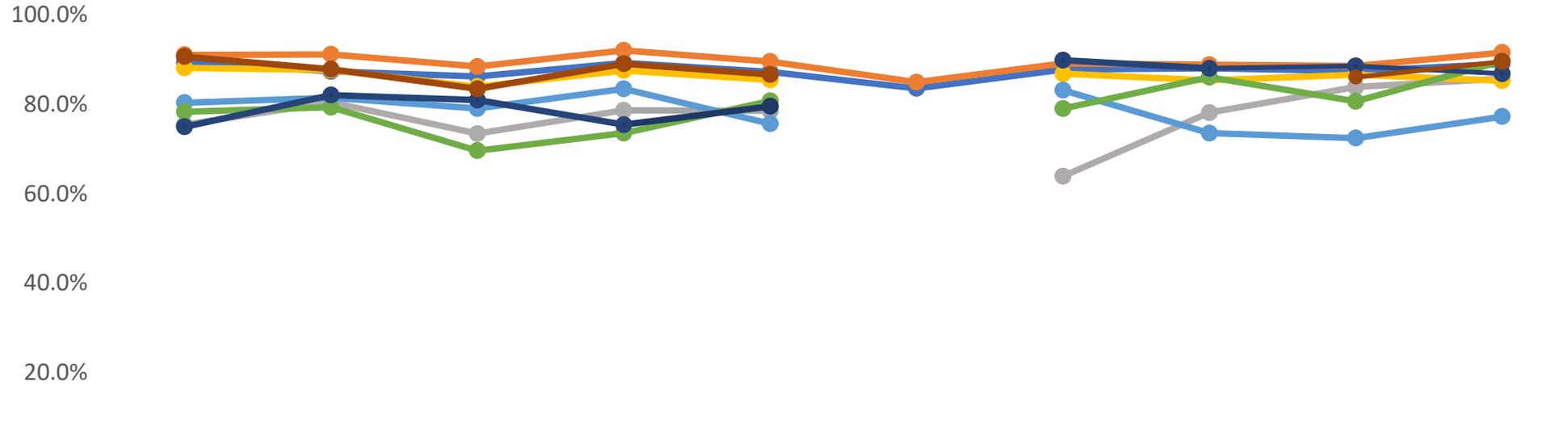


SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** give higher satisfaction scores than male respondents from this visitor market.
- **Age:** Satisfaction is lowest among senior visitors (65 years and older) from **Japan** compared to those younger from this visitor market.
- **Trips to Hawai‘i:** Repeat visitors from **U.S. West** give higher satisfaction scores than first-time visitors from this market.
- **Travel party size:** Visitors from **U.S. East** in larger (3+ persons) travel parties give higher satisfaction scores than those traveling alone.

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	89.3%	87.3%	86.2%	89.2%	87.2%	83.5%	87.7%	88.0%	87.4%	89.0%
U.S. East	91.0%	91.1%	88.4%	92.0%	89.5%	84.9%	89.1%	88.8%	88.5%	91.5%
Japan	75.4%	80.4%	73.4%	78.6%	78.5%		63.9%	78.1%	83.8%	85.7%
Canada	88.1%	87.6%	83.9%	87.5%	85.4%		86.8%	85.3%	86.6%	85.2%
Oceania	80.3%	81.4%	79.0%	83.4%	75.6%		83.1%	73.5%	72.4%	77.2%
Korea	78.3%	79.3%	69.6%	73.5%	80.7%		79.0%	86.0%	80.6%	89.6%
China	74.9%	82.0%	80.9%	75.4%	79.5%		89.8%	88.0%	88.5%	86.8%
Europe	90.6%	87.8%	83.4%	89.0%	86.6%				86.0%	89.5%

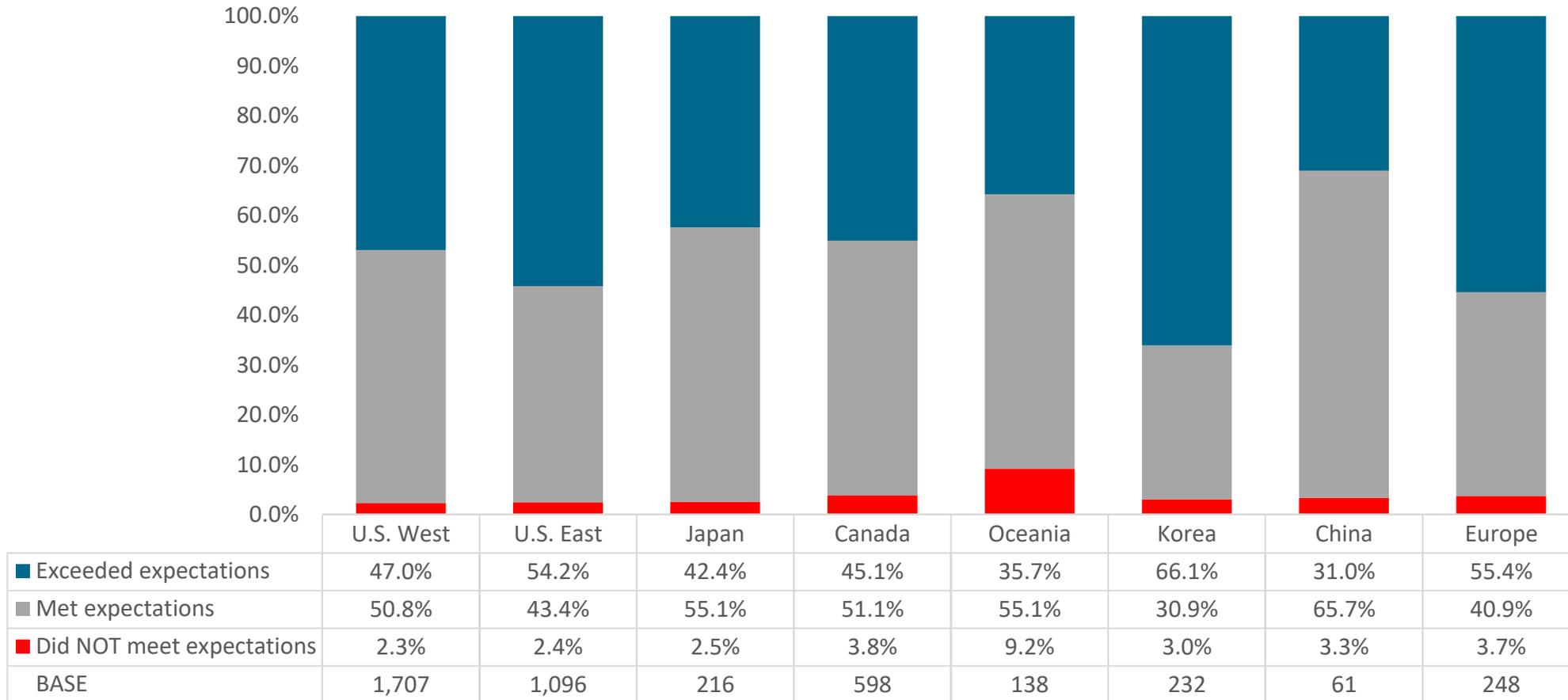
P= Preliminary Data

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

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

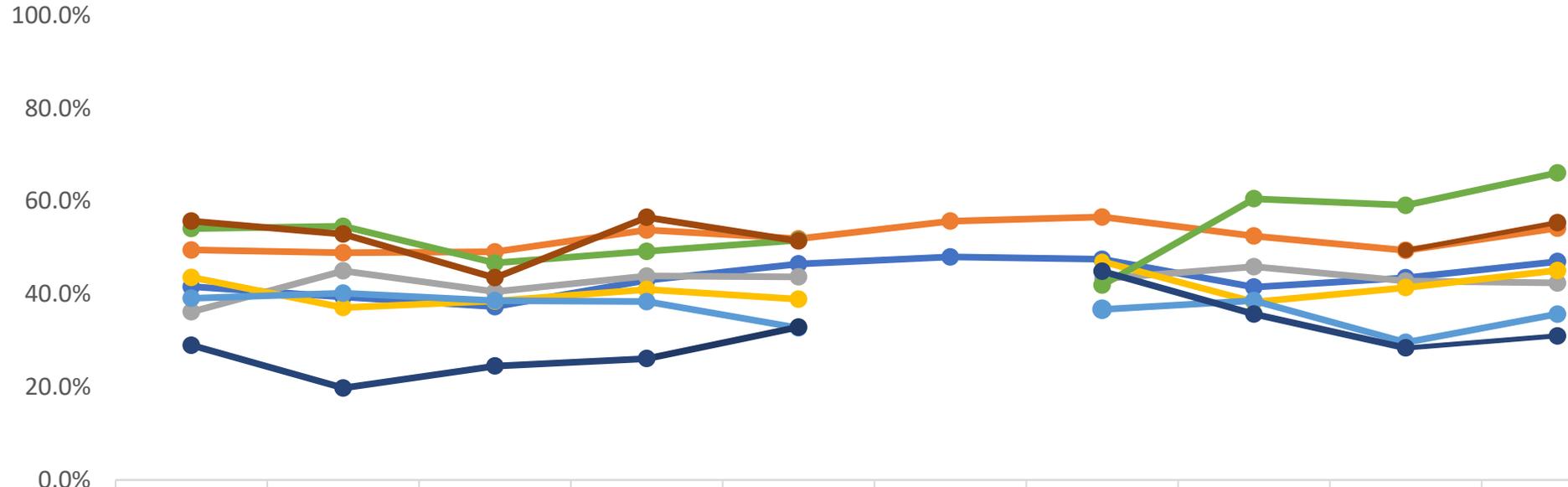


SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- ***Trips to Hawai‘i:*** First-time visitors from the following visitor markets are more likely to feel their trip exceeded their expectations than repeat visitors: **U.S. West, U.S. East, Canada** and **Japan**.
- ***Age:*** Younger respondents from **U.S. West** (18 – 34 years old), **U.S. East** (18 – 49 years old), **Canada** (18 – 34 years old) and **Japan** (18 – 34 years old), are more likely to respond that their trip exceeded expectations compared to visitors from these markets in older age groups, particularly seniors.
- ***Gender:*** Female visitors from **U.S. West, U.S. East** and **Canada** gave higher mean satisfaction scores compared to male visitors from these markets.
- ***Islands visited:*** Visitors from **U.S. West** whose trip was limited to a single island are more likely to feel their trip exceeded their expectations compared to those whose trip included stays on multiple islands.
- ***Education:*** College graduates from **U.S. East** are more likely to feel their trip exceeded their expectations compared to visitors from this market without a college degree.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



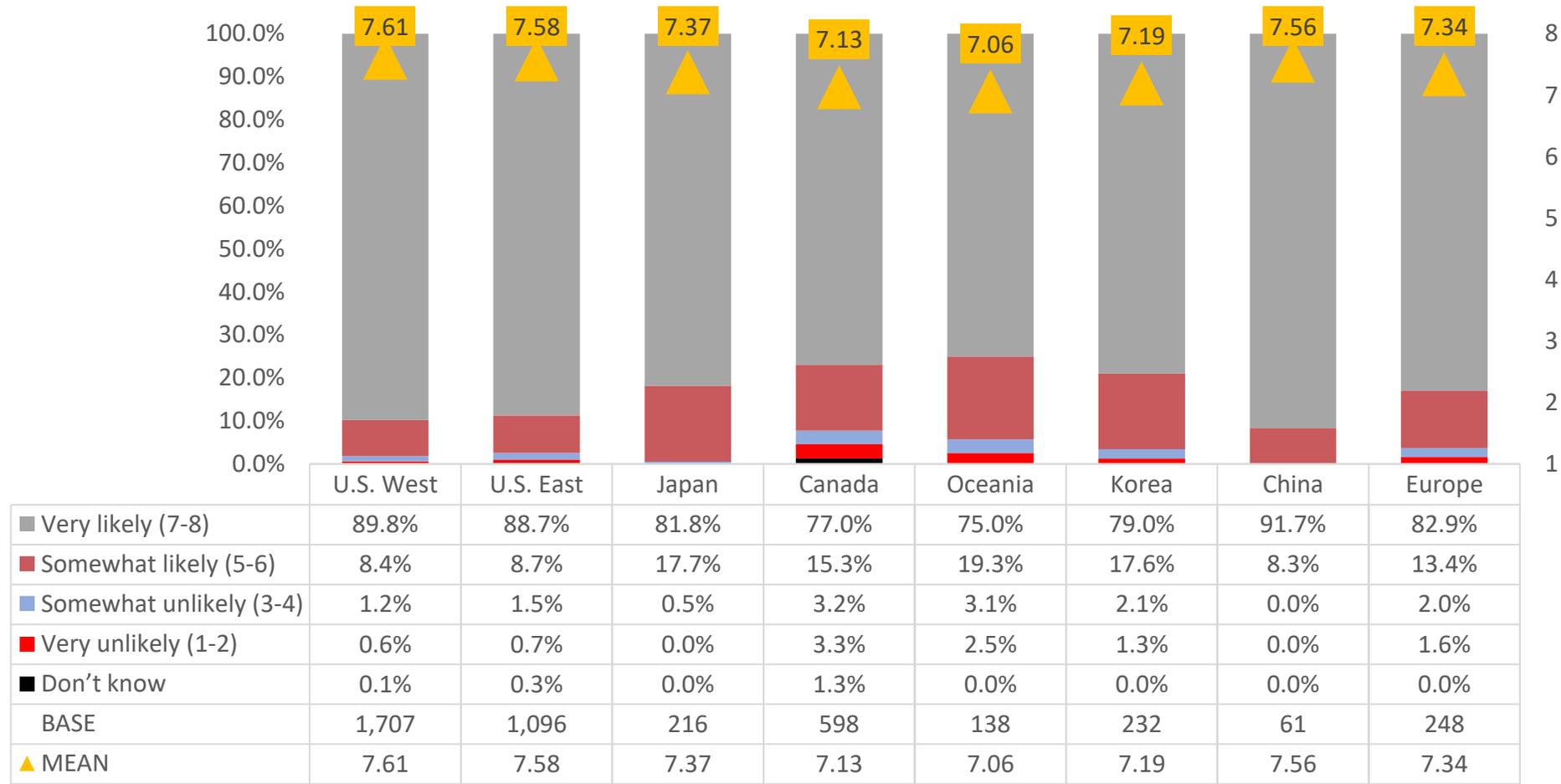
	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	41.6%	39.4%	37.3%	43.0%	46.5%	48.0%	47.5%	41.5%	43.5%	47.0%
U.S. East	49.5%	48.9%	49.1%	53.8%	51.9%	55.7%	56.6%	52.5%	49.4%	54.2%
Japan	36.2%	45.0%	40.5%	43.9%	43.7%		43.3%	45.9%	42.8%	42.4%
Canada	43.6%	37.1%	38.5%	41.0%	38.9%		47.0%	38.3%	41.4%	45.1%
Oceania	39.1%	40.2%	38.6%	38.4%	32.7%		36.7%	38.6%	29.6%	35.7%
Korea	54.1%	54.6%	46.7%	49.2%	51.6%		41.9%	60.5%	59.1%	66.1%
China	29.0%	19.8%	24.5%	26.1%	32.9%		44.9%	35.7%	28.4%	31.0%
Europe	55.7%	52.9%	43.5%	56.5%	51.4%				49.4%	55.4%

P= Preliminary Data

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

BRAND/ DESTINATION - ADVOCACY

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

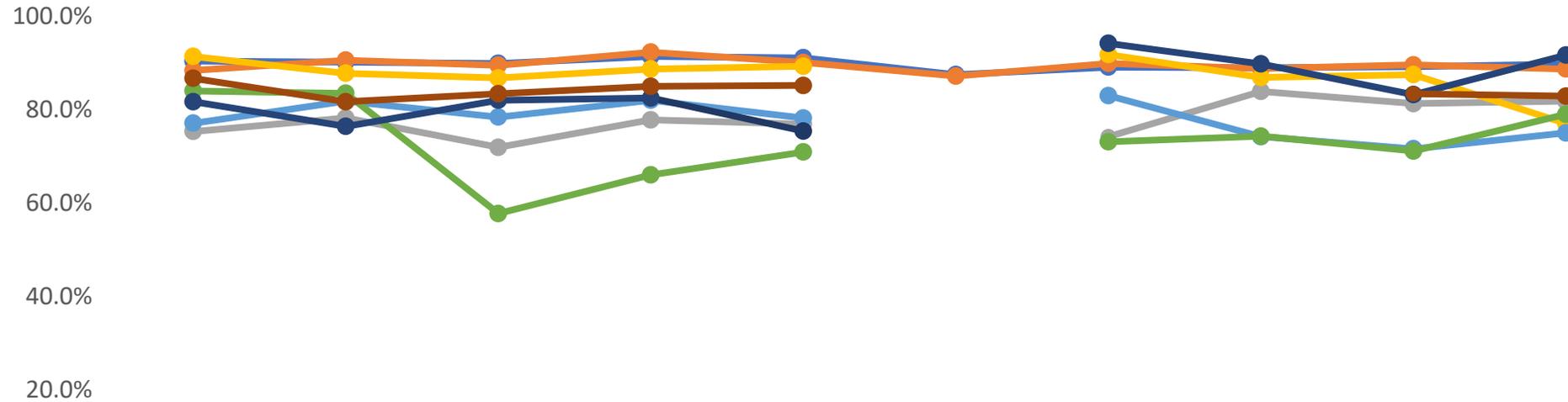


BRAND/ DESTINATION - ADVOCACY

- **Gender:** Female respondents from **U.S. West** and **Japan** are more likely to recommend the state to others than male respondents from these visitor markets.
- **Trips to Hawai'i:** Brand advocacy scores are higher amongst repeat visitors from **U.S. West**.
- **Education:** Visitors without a college degree from **U.S. West** are more likely to recommend the state than college graduates.
- **Travel party size:** Visitors from **U.S. East** traveling alone are least likely to recommend the state compared to those traveling in parties of 2+ persons from this visitor market.
- **Age:** Senior visitors from **Japan** (65 years and older) are least likely to recommend the state compared to younger travelers from this market.

BRAND/ DESTINATION - ADVOCACY

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	90.4%	90.2%	89.9%	91.4%	91.1%	87.5%	89.1%	89.0%	89.2%	89.8%
U.S. East	88.4%	90.6%	89.5%	92.3%	90.1%	87.2%	89.9%	88.8%	89.6%	88.7%
Japan	75.3%	78.2%	71.9%	77.8%	76.9%		74.2%	83.9%	81.3%	81.8%
Canada	91.4%	87.8%	86.8%	88.7%	89.3%		91.8%	86.9%	87.5%	77.0%
Oceania	77.1%	81.8%	78.4%	82.0%	78.2%		83.0%	74.2%	71.6%	75.0%
Korea	84.0%	83.5%	57.7%	66.0%	70.9%		73.1%	74.3%	71.1%	79.0%
China	81.7%	76.4%	82.0%	82.5%	75.4%		94.2%	89.8%	83.2%	91.7%
Europe	86.7%	81.7%	83.4%	85.0%	85.2%				83.4%	82.9%

P= Preliminary Data

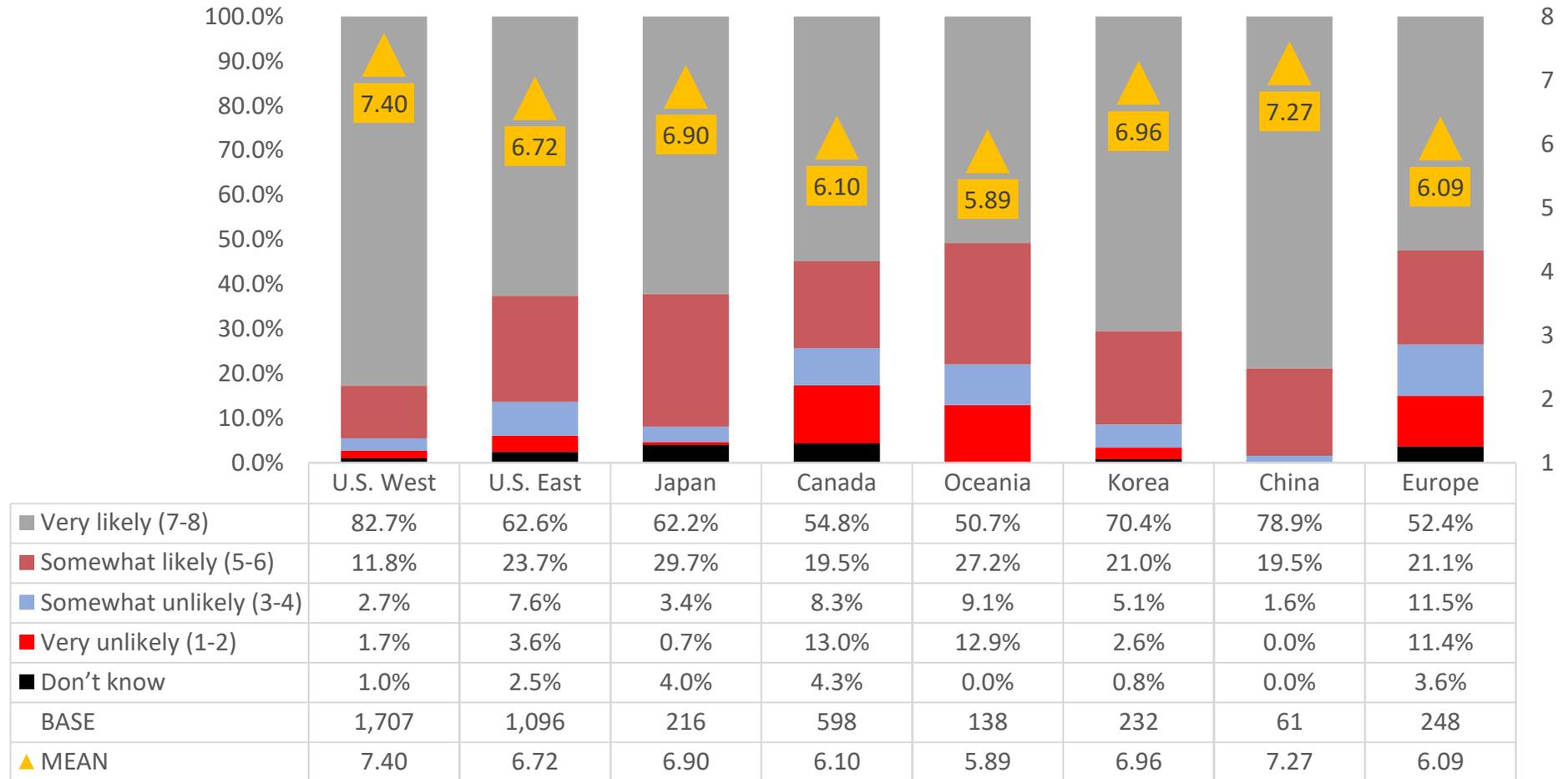
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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



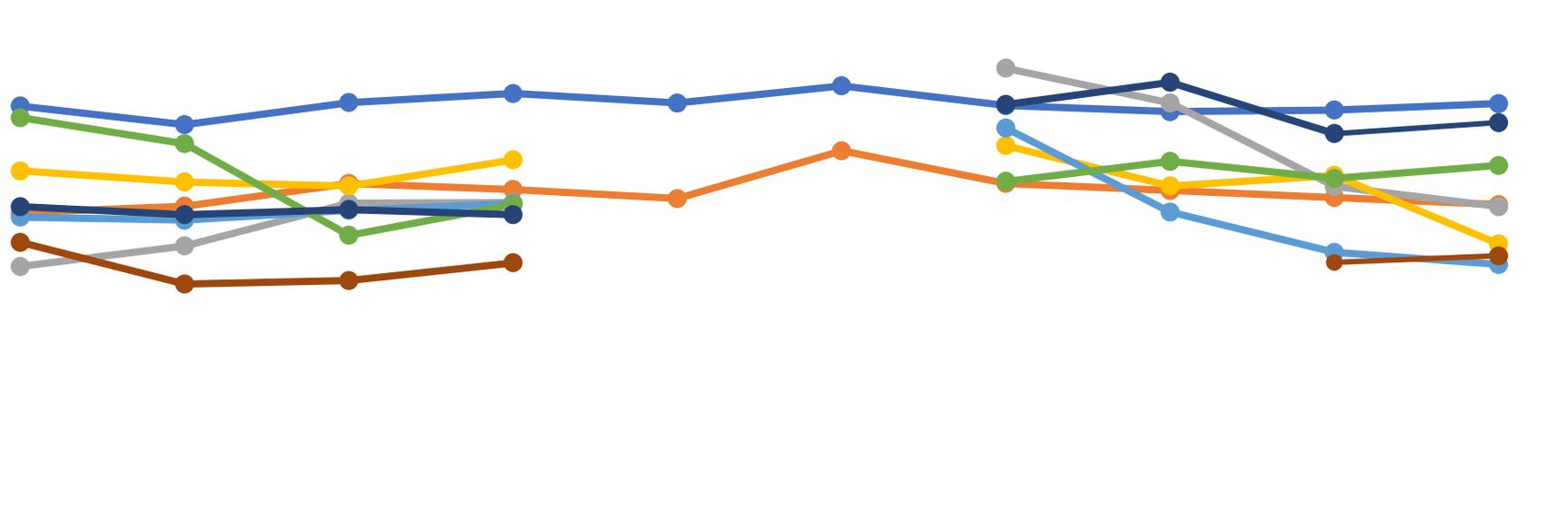
LIKELIHOOD OF RETURN VISIT

- **Gender:** Male respondents from **U.S. East** express 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 express 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. West** and **U.S. East** whose trip consisted of visiting a single island express 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 are more likely to return.
- **Travel party size:** Those visitors from **U.S. West** who traveled to the state by themselves express 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+) express a higher probability of returning to the state than less affluent travelers from this market.
- **Education:** Travelers without a college degree from **U.S. West** express a stronger likelihood to return.

LIKELIHOOD OF RETURN VISIT

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

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	82.2%	78.5%	82.9%	84.7%	82.8%	86.2%	82.3%	81.1%	81.4%	82.7%
U.S. East	61.0%	62.3%	66.8%	65.6%	63.8%	73.3%	66.8%	65.4%	64.0%	62.6%
Japan	50.3%	54.4%	62.9%	63.0%	58.7%		89.7%	82.8%	66.2%	62.2%
Canada	69.3%	67.1%	66.3%	71.5%	68.7%		74.3%	66.3%	68.4%	54.8%
Oceania	60.1%	59.5%	61.5%	62.8%	56.0%		77.8%	61.1%	53.1%	50.7%
Korea	79.9%	74.7%	56.5%	62.6%	67.7%		67.2%	71.2%	67.8%	70.4%
China	62.2%	60.6%	61.6%	60.6%	58.9%		82.5%	86.9%	76.7%	78.9%
Europe	55.1%	46.8%	47.5%	51.0%	50.2%				51.1%	52.4%

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

Q1 2024 P	Q1 2025 P
59.7% Too expensive	47.9% High cost of travel
33.0% Want to go someplace new	18.2% Preference for other destinations
30.6% Poor value	11.8% Cultural and environmental concerns
25.6% Too crowded/ congested	10.4% Negative local interactions
19.5% Five years is too soon to revisit	
17.1% No compelling reason to return	
16.9% Too commercialized/ overdeveloped	
12.2% Flight too long	
11.0% Poor service	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q1 2024 P	Q1 2025 P
55.6% Too expensive	41.5% High cost of travel
44.8% Flight too long	29.1% Preference for other destinations
38.9% Want to go someplace new	24.9% Long travel distance
20.9% Poor value	10.2% Health and personal limitations/ age
19.3% Too crowded/ congested	
14.4% Five years is too soon	
11.3% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q1 2024* P	Q1 2025** P
70.8% Too expensive 39.3% Want to go someplace new 36.6% Five years is too soon 20.9% Other financial obligations	34.2% High cost of travel 15.0% Financial constraints 15.0% Exchange rate

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

**Caution small base (n=21 respondents) in Q1 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q1 2024 P	Q1 2025 P
64.9% Too expensive	45.2% Political climate
37.4% Want to go someplace new	30.2% High cost of travel
36.0% Flight too long	12.0% Long travel distance
22.0% Five years is too soon	11.7% Travel restrictions or relations
20.7% Poor value	
12.4% Other financial obligations	
10.7% Too crowded/ congested	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q1 2024 P	Q1 2025* P
52.5% Too expensive	48.4% High cost of travel
40.5% Want to go someplace new	18.7% Preference for other destinations
30.0% Poor value	13.1% Homeless and urban issues
25.0% Too commercialized/ overdeveloped	
17.8% No compelling reason to return	
17.0% Flight too long	
15.0% Five years is too soon	
15.0% Too crowded/ congested	

*Caution small base (n=28 respondents) in Q1 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q1 2024* P	Q1 2025** P
58.2% Too expensive	56.9% High cost of travel
31.7% No compelling reason to return	16.5% Preference for other destinations
28.0% Poor value	
22.8% Flight too long	
21.2% Want to go someplace new	
12.2% Five years is too soon	
10.6% Dirty/ filthy	

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

**Caution small base (n=19 respondents) in Q1 2025.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Q1 2024* P	Q1 2025** P
100% Too crowded/ congested 69.7% No compelling reason to return 69.7% Too expensive 69.7% Poor value 60.6% Flight too long 30.3% Five years is too soon 30.3% Want to go someplace new	100% No reason in particular

*Caution small base (n=1 respondents) in Q1 2024.

**Caution small base (n=1 respondents) in Q1 2025.

P= Preliminary Data

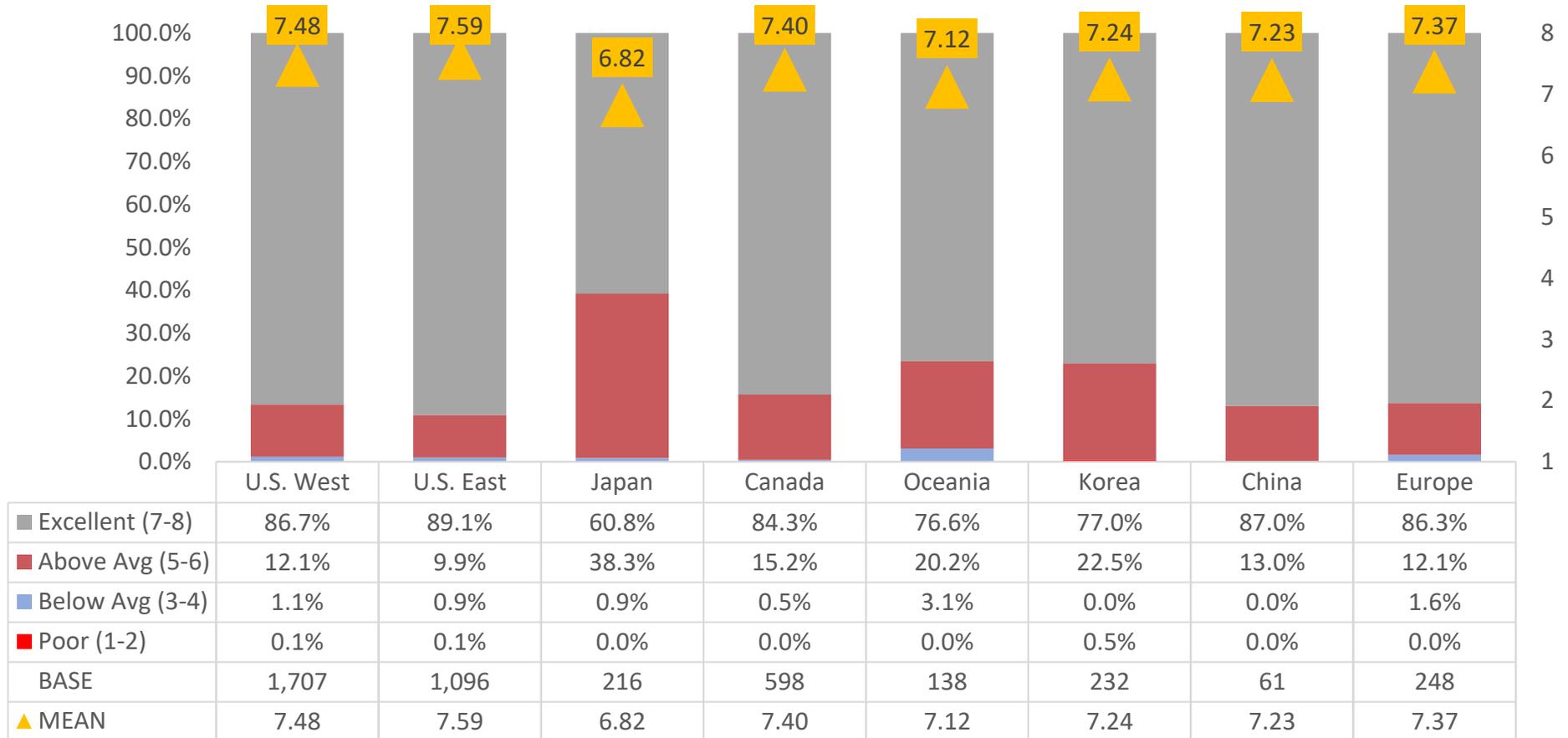
UNLIKELY TO RETURN - TOP REASONS EUROPE

Q1 2024 P	Q1 2025 P
58.5% Flight too long	44.7% Long travel distance
57.6% Too expensive	40.0% High cost of travel
32.3% Want to go someplace new	15.2% Preference for other destinations
17.8% Poor value	
16.8% Five years is too soon	
12.1% Too commercialized/ overdeveloped	
10.7% No compelling reason to return	

P= Preliminary Data

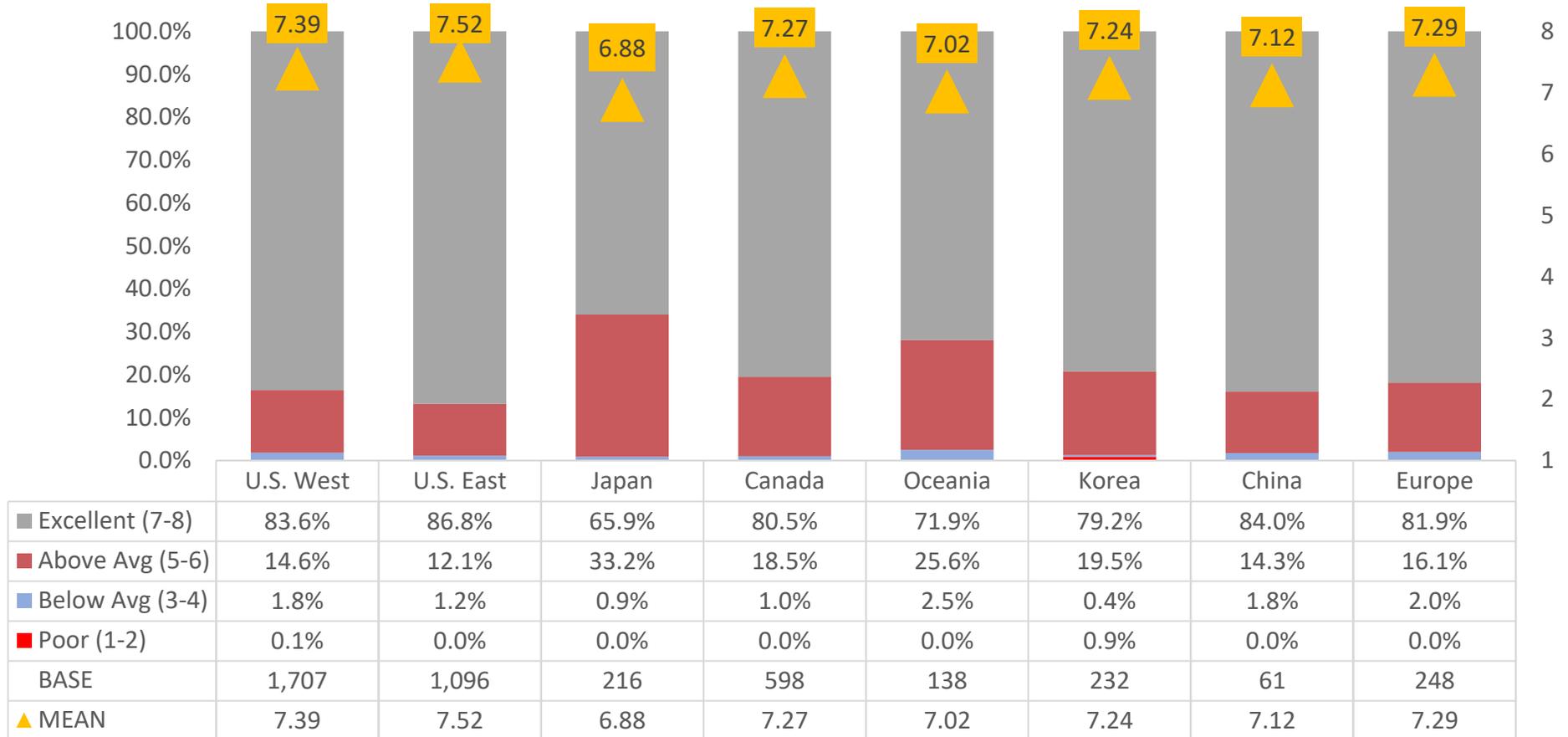
OFFERING A VARIETY OF EXPERIENCES

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



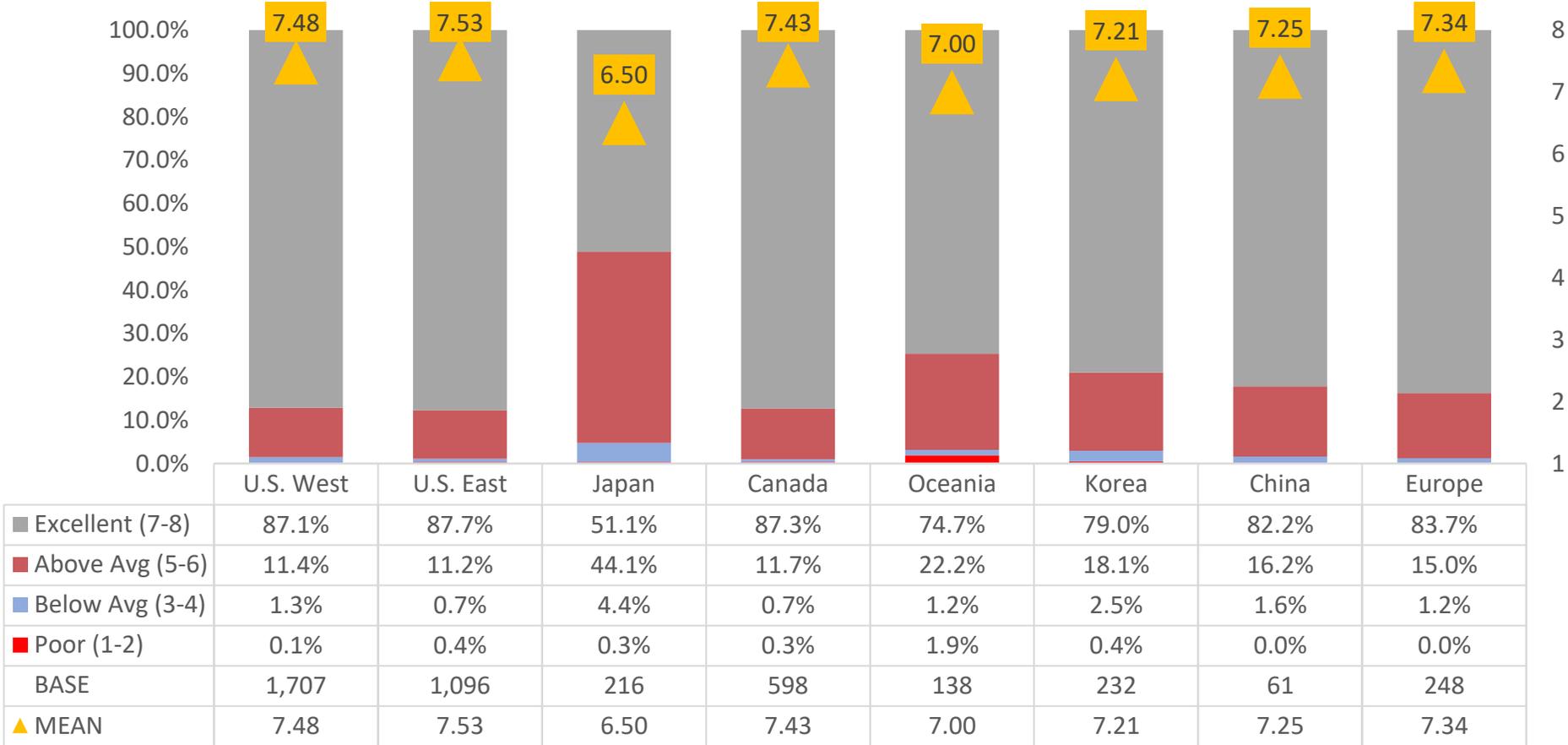
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



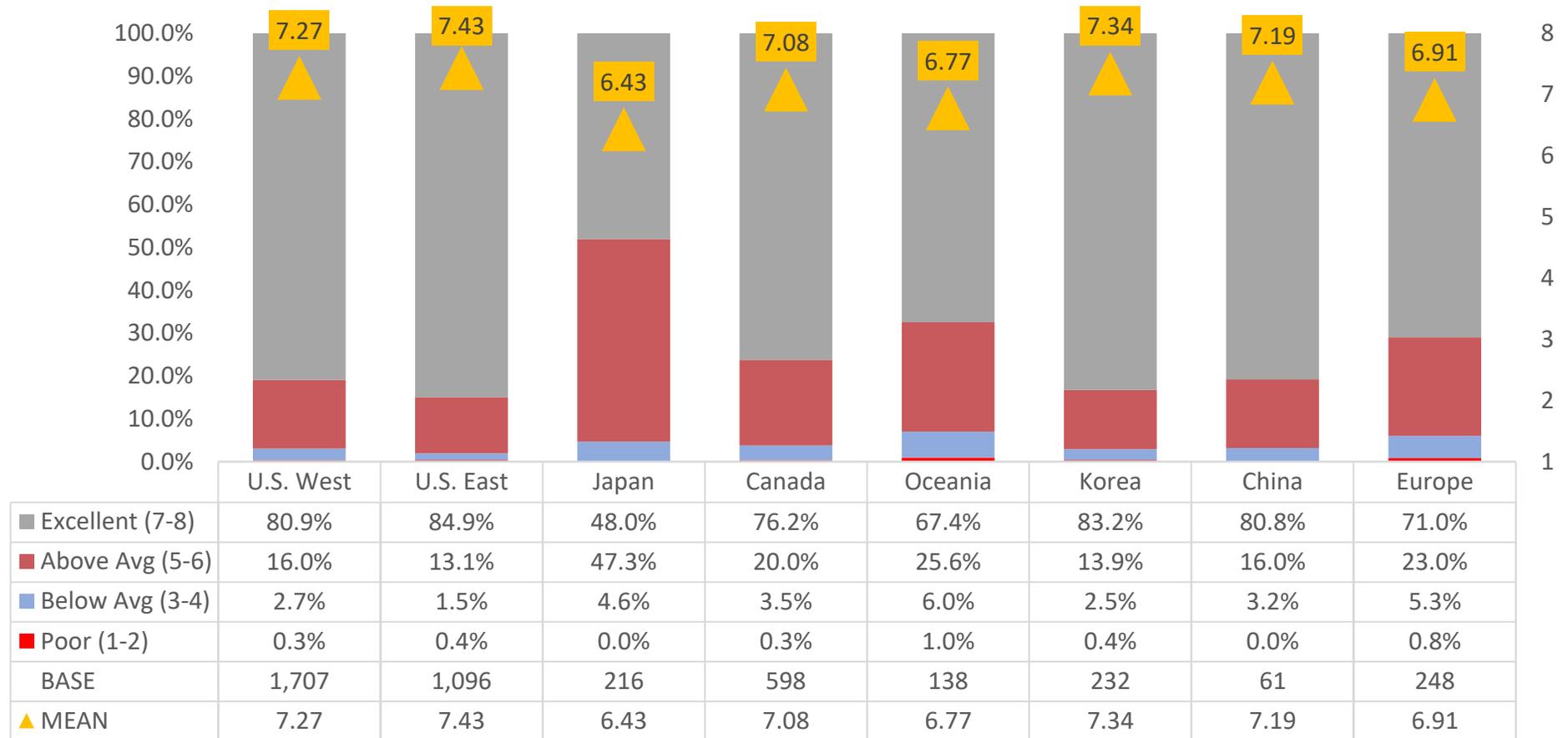
SAFE AND SECURE DESTINATION

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



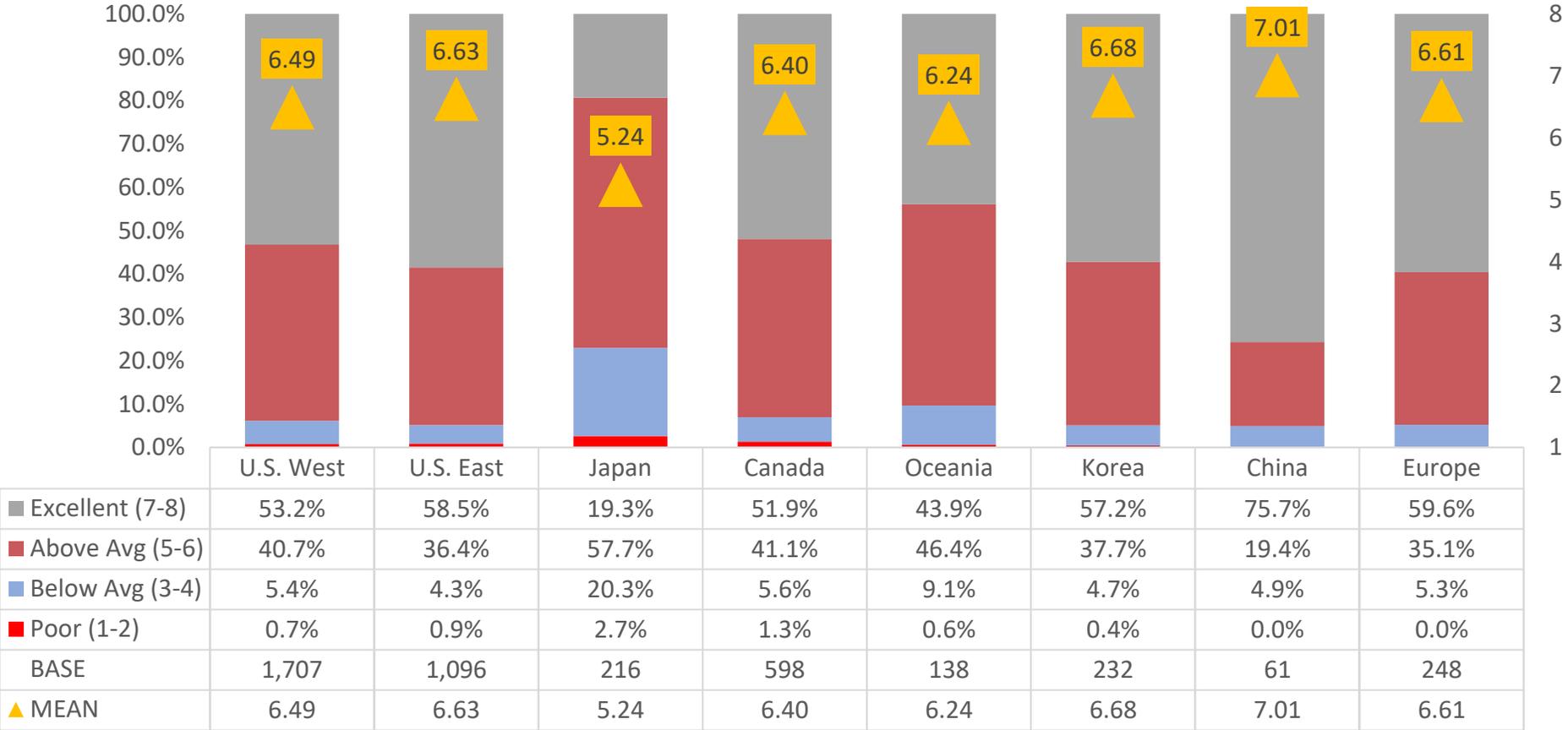
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	97.0%	98.5%	95.9%	98.8%	96.4%	99.5%	96.6%	99.6%
On own (self-guided)/ driving around island	83.5%	81.9%	75.9%	84.4%	62.8%	85.2%	61.7%	81.4%
Helicopter ride/ airplane tour	2.3%	6.6%	0.6%	5.6%	2.3%	5.2%	1.6%	10.1%
Boat tour/ submarine ride/ whale watching	29.4%	38.3%	14.2%	33.2%	20.3%	33.6%	43.5%	40.9%
Visit towns/ communities	53.2%	59.4%	41.8%	61.9%	43.5%	40.8%	26.8%	56.7%
Private limousine/ van tour/ tour bus	6.1%	13.5%	10.5%	10.8%	28.9%	5.7%	20.2%	12.3%
Scenic views/ natural landmarks	64.4%	74.9%	26.8%	75.7%	67.7%	65.9%	71.4%	69.7%
Movie/ TV/ film location tours	4.1%	6.9%	4.2%	6.1%	12.6%	16.6%	16.6%	13.5%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.6%	96.1%	92.9%	97.4%	95.4%	99.1%	96.8%	95.8%
Beach/ sunbathing	82.8%	81.3%	72.2%	87.7%	77.6%	80.3%	83.5%	82.7%
Bodyboarding	10.8%	6.5%	0.0%	10.9%	12.6%	4.4%	8.1%	5.0%
Standup paddle boarding	4.5%	3.8%	1.1%	4.3%	6.3%	5.3%	3.4%	2.1%
Surfing	6.0%	5.8%	5.0%	7.3%	9.7%	9.0%	6.4%	11.0%
Canoe paddling	1.8%	1.2%	0.6%	2.2%	0.0%	4.4%	0.0%	2.1%
Kayaking	3.8%	3.4%	2.0%	3.6%	1.3%	3.9%	1.6%	4.2%
Swimming in the ocean	65.3%	58.2%	30.7%	73.9%	67.6%	57.4%	37.9%	66.5%
Snorkeling	40.1%	36.0%	9.9%	45.3%	35.5%	59.1%	29.9%	37.1%
Freediving	1.6%	1.3%	1.1%	2.2%	0.6%	2.2%	9.8%	0.4%
Windsurfing/ kitesurfing	0.1%	0.1%	0.0%	0.7%	0.0%	0.4%	3.2%	0.0%
Jet skiing/ parasailing	0.7%	0.6%	4.0%	1.4%	1.0%	0.8%	0.0%	0.0%
Scuba diving	2.7%	1.6%	1.8%	2.5%	1.7%	0.9%	1.8%	2.1%
Fishing	2.2%	2.4%	1.1%	1.9%	1.9%	0.0%	3.6%	0.4%
Golf	7.3%	7.0%	6.0%	11.6%	3.6%	7.2%	0.0%	2.1%
Running/ jogging/ fitness/ walking	31.3%	31.7%	15.0%	41.6%	27.9%	15.9%	35.1%	26.4%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.6%	96.1%	92.9%	97.4%	95.4%	99.1%	96.8%	95.8%
Cycling	2.4%	2.2%	5.0%	4.4%	1.9%	3.0%	3.4%	4.2%
Spa	9.6%	11.2%	3.5%	6.5%	6.5%	6.7%	5.0%	5.9%
Hiking	39.6%	46.0%	19.9%	43.1%	17.5%	27.7%	54.9%	42.3%
Backpacking/ camping	1.1%	1.3%	0.3%	2.1%	0.0%	3.0%	6.4%	3.4%
Agritourism	17.7%	21.5%	9.3%	15.5%	14.9%	25.7%	18.3%	14.7%
Sports event or tournament	1.8%	1.5%	2.2%	3.2%	6.3%	0.9%	1.8%	2.5%
Parks/ botanical gardens	35.2%	40.9%	24.5%	39.4%	30.0%	26.2%	53.5%	47.2%
Waterparks	1.2%	1.1%	2.8%	2.7%	0.0%	3.1%	0.0%	2.2%
Mountain tubing/ waterfall rappel	1.7%	2.1%	0.0%	2.0%	0.6%	1.3%	0.0%	5.5%
Zip-lining	2.9%	2.9%	0.0%	1.1%	1.9%	0.4%	3.2%	0.4%
Skydiving	0.3%	0.8%	1.1%	0.5%	0.0%	2.2%	5.0%	0.4%
All-terrain vehicle (ATV)	2.2%	3.2%	0.9%	2.3%	8.9%	8.2%	10.0%	2.9%
Horseback riding	1.3%	1.5%	2.6%	0.9%	0.0%	0.5%	3.4%	0.0%
Tennis/ pickleball	2.4%	2.0%	0.0%	6.1%	0.6%	2.8%	3.4%	0.9%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	98.4%	98.2%	96.7%	98.1%	99.4%	99.2%	98.4%	98.8%
Lunch/ sunset/ dinner/ evening cruise	20.7%	24.0%	15.1%	19.4%	31.2%	38.8%	68.3%	28.6%
Live music/ stage show	27.2%	37.2%	24.0%	34.7%	32.0%	15.3%	20.0%	28.4%
Nightclub/ dancing/ bar/ karaoke	7.3%	7.1%	5.1%	7.4%	13.1%	4.4%	8.2%	11.0%
Fine dining	50.0%	56.3%	42.9%	48.9%	38.7%	47.5%	54.9%	38.8%
Family restaurant	72.2%	66.4%	32.1%	74.3%	77.1%	47.9%	36.7%	49.9%
Fast food	33.1%	33.5%	53.1%	45.9%	65.2%	65.0%	50.3%	46.8%
Food truck	42.1%	43.3%	23.3%	43.6%	41.4%	60.9%	40.2%	48.1%
Café/ coffee house	52.3%	49.7%	55.8%	54.3%	60.9%	71.5%	48.0%	64.6%
Ethnic dining	23.0%	26.6%	5.3%	19.1%	5.6%	24.0%	28.1%	14.7%
Farm-to-table cuisine	16.3%	18.3%	11.9%	12.3%	2.6%	2.7%	15.0%	6.7%
Prepared own meal	43.1%	33.9%	19.9%	57.2%	23.5%	18.2%	12.3%	39.5%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.1%	96.6%	99.0%	97.6%	99.4%	99.2%	96.6%	97.5%
Malls/ department stores	46.3%	43.8%	83.3%	60.5%	84.5%	81.9%	71.7%	65.9%
Designer boutiques	20.1%	24.3%	17.2%	23.1%	24.1%	6.2%	18.3%	22.5%
Hotel/ resort stores	40.4%	46.7%	32.1%	40.5%	52.8%	46.5%	54.8%	41.8%
Swap meet/ flea market	16.9%	19.1%	6.5%	19.5%	18.0%	8.7%	5.2%	16.9%
Discount/ outlet stores	13.8%	14.3%	26.5%	23.2%	44.0%	63.6%	23.8%	23.4%
Supermarkets	61.5%	54.7%	66.1%	65.9%	66.2%	61.4%	76.7%	75.5%
Farmer's market	31.9%	29.3%	13.7%	35.7%	17.5%	11.1%	10.0%	38.2%
Convenience stores	45.2%	49.1%	52.0%	55.0%	72.1%	62.8%	64.4%	34.0%
Duty free stores	5.0%	4.5%	21.7%	5.4%	12.2%	29.4%	29.7%	12.3%
Hawai'i-made products	48.8%	54.2%	9.7%	51.8%	43.3%	29.3%	66.9%	52.2%
Local shops and artisans	60.4%	67.2%	6.2%	62.8%	49.3%	19.0%	35.1%	54.7%
Local fashion designers	10.1%	12.1%	2.6%	14.1%	10.2%	2.2%	5.0%	16.3%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	68.5%	77.1%	62.8%	69.3%	78.6%	67.1%	89.8%	80.0%
Historic military sites and museums	19.0%	29.6%	15.0%	21.3%	54.2%	29.4%	54.9%	39.4%
Historic Hawaiian sites and museums	36.8%	42.5%	17.0%	38.2%	43.4%	14.6%	38.5%	46.6%
Other historical sites, museums, and homes	13.4%	16.7%	8.4%	13.4%	12.4%	25.1%	14.9%	18.1%
Art museums	4.1%	4.2%	5.7%	5.2%	1.7%	10.1%	6.8%	6.7%
Art galleries and exhibitions	11.4%	13.2%	6.3%	12.6%	10.5%	4.4%	3.4%	10.4%
Lū'au/ Polynesian show/ hula show	20.8%	32.1%	12.1%	26.5%	26.2%	15.8%	13.2%	31.1%
Lesson- ex. ukulele, hula, canoe, lei making	4.9%	6.5%	7.5%	6.2%	6.3%	5.3%	16.8%	5.9%
Play/ concert/ theatre	3.6%	3.2%	9.1%	4.3%	4.6%	3.6%	3.4%	6.3%
Art/ craft fair	11.1%	11.4%	3.8%	11.8%	2.3%	3.6%	8.2%	10.1%
Festival/ event	3.1%	3.7%	3.5%	4.5%	5.2%	2.6%	3.4%	4.2%

ACTIVITIES - TRANSPORTATION

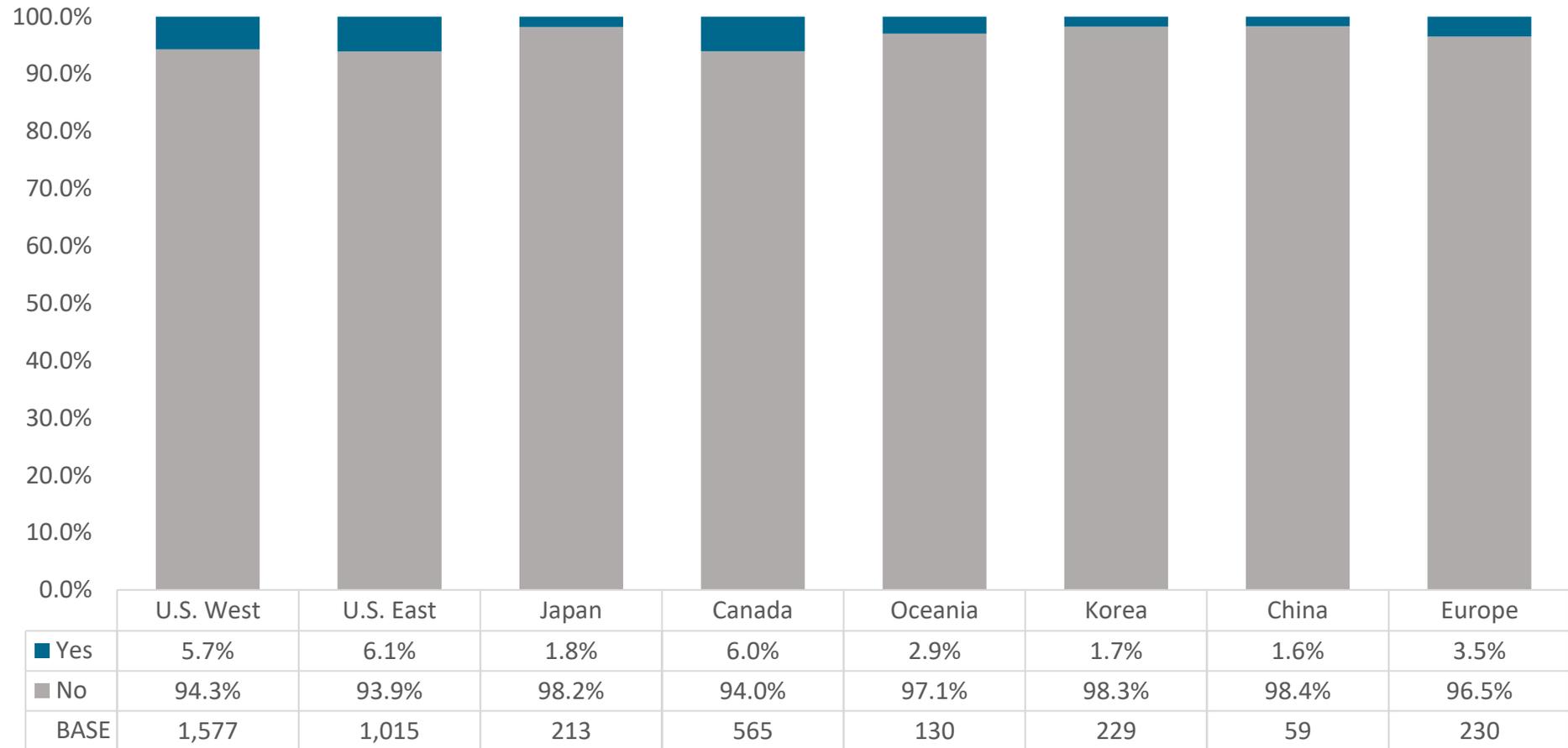
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	93.0%	93.5%	96.3%	94.1%	97.1%	98.3%	98.2%	95.8%
Airport shuttle	16.8%	18.1%	19.1%	18.8%	28.3%	14.5%	28.3%	21.2%
Trolley	2.0%	1.2%	43.5%	4.3%	18.6%	25.6%	11.6%	5.9%
Public bus	4.9%	4.8%	29.8%	11.3%	24.7%	10.9%	28.3%	22.0%
Tour bus/ tour van	6.7%	14.3%	21.7%	14.4%	36.8%	22.7%	16.5%	14.5%
Taxi/ limo	5.8%	8.2%	26.6%	15.1%	31.3%	28.6%	28.1%	19.0%
Rental car	73.2%	72.5%	18.1%	70.4%	38.7%	55.8%	41.9%	64.3%
Ride share	20.6%	24.9%	22.3%	24.8%	44.6%	23.9%	44.9%	21.4%
Car share	3.4%	2.8%	3.7%	4.3%	4.0%	2.2%	0.0%	2.5%
Bicycle rental	2.0%	2.6%	7.8%	3.4%	1.3%	1.7%	3.6%	3.4%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	35.2%	34.7%	23.4%	29.3%	15.0%	19.5%	22.0%	20.5%
Visit friends/ family	27.1%	24.6%	14.4%	21.7%	10.5%	16.4%	17.0%	13.8%
Volunteering/ giving back to the local community	2.0%	2.1%	1.5%	2.5%	0.6%	1.7%	1.8%	1.3%
Health and wellness activities	9.9%	11.8%	8.1%	8.9%	3.9%	1.4%	5.0%	7.6%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

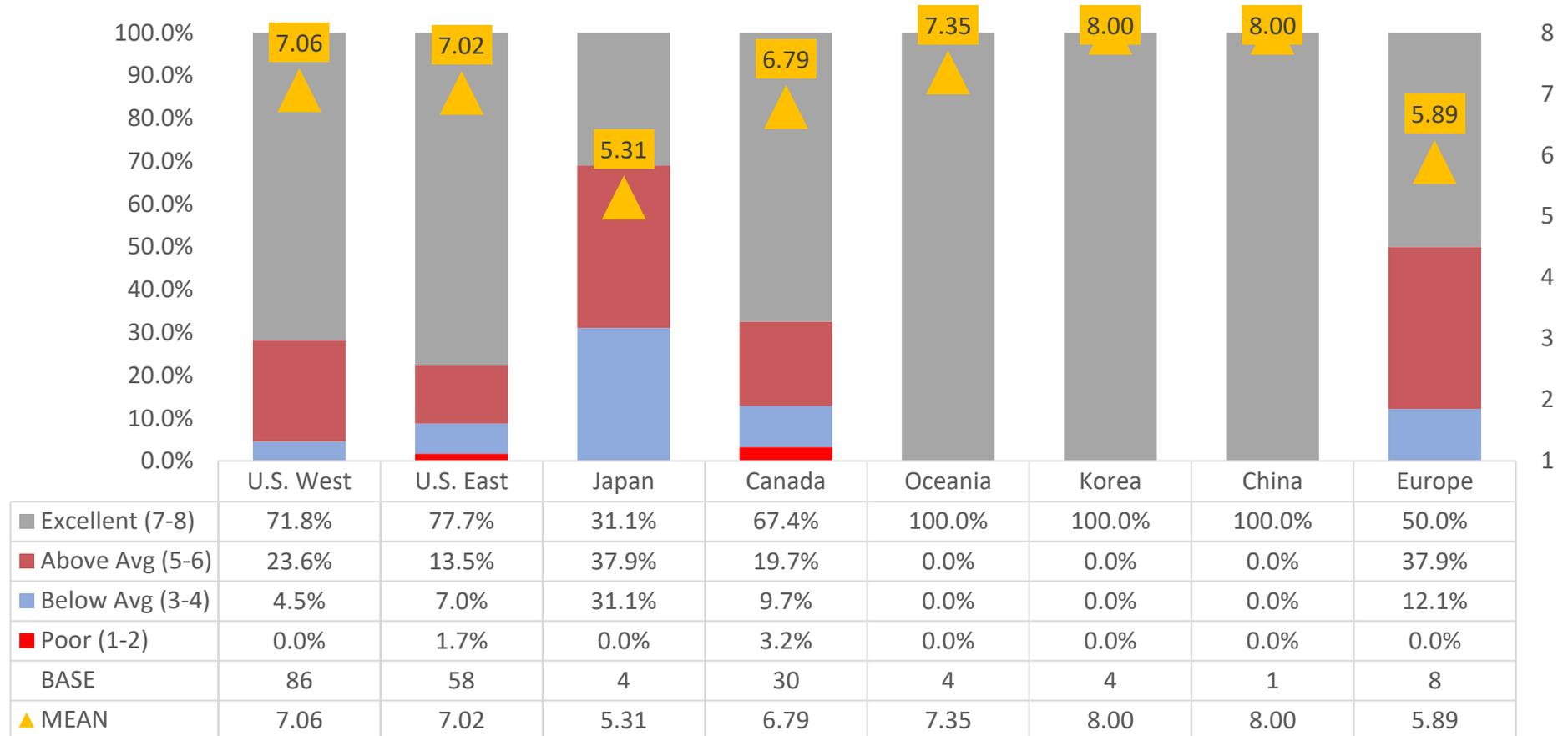


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Mobility aid	67.3%	65.5%	50.0%	73.4%	56.4%	24.4%	0.0%	50.0%
Personal assistance	26.0%	12.9%	0.0%	23.1%	43.6%	0.0%	0.0%	37.9%
NA- No one needed assistance	6.8%	13.4%	50.0%	2.9%	0.0%	51.3%	100.0%	12.9%
Orientation and Mobility Assistance	6.8%	8.0%	0.0%	14.6%	0.0%	0.0%	0.0%	0.0%
Other	3.6%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ambulance/ hospital/ medical visit	2.2%	6.3%	0.0%	0.0%	0.0%	24.4%	0.0%	0.0%
Disabled parking/ placard	4.3%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lift equipped van	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.1%
Respiratory equipment	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	0.0%	0.0%	0.0%	0.0%	24.4%	0.0%	0.0%
BASE	90	62	4	34	4	4	1	8

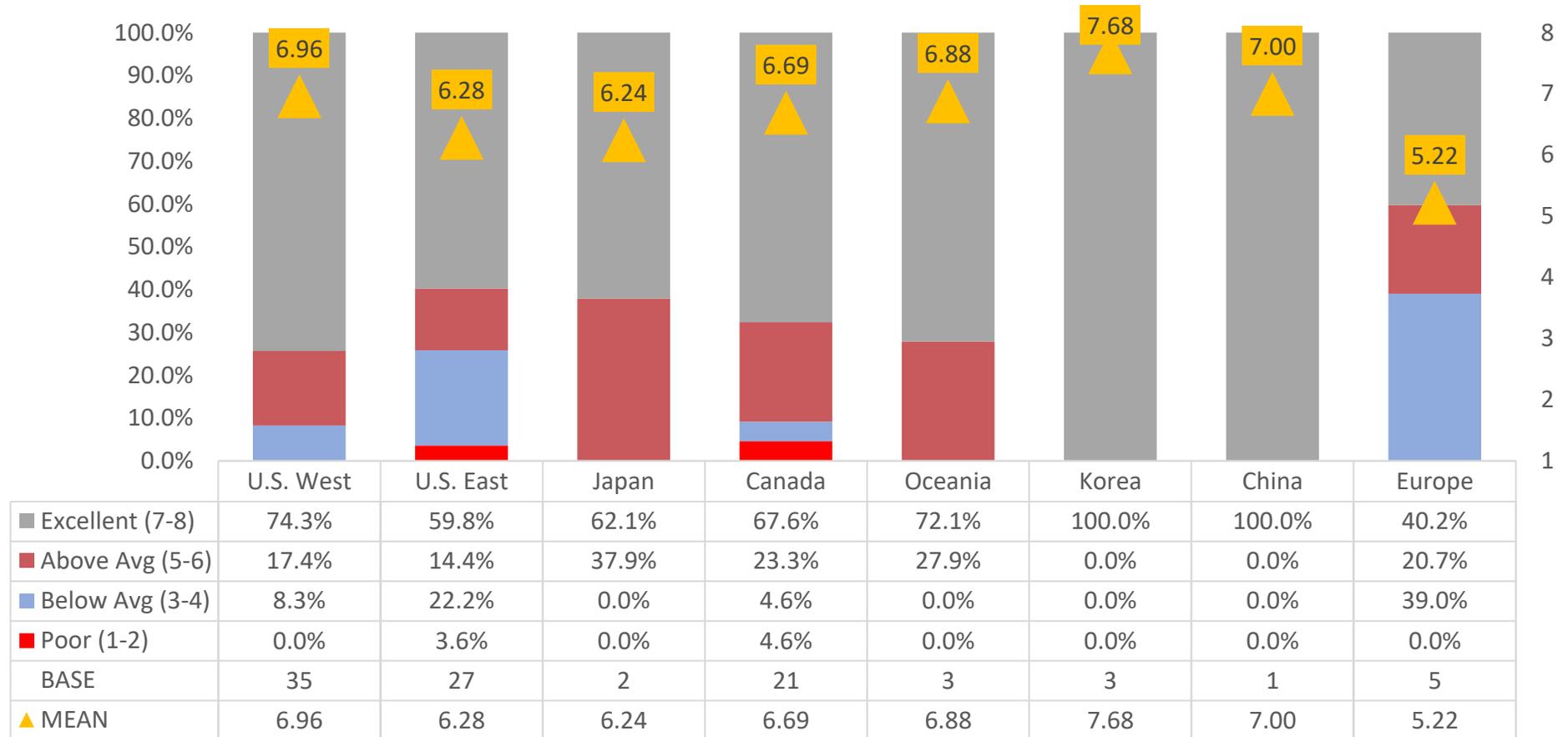
OVERALL ACCESSIBILITY - AIRPORTS

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



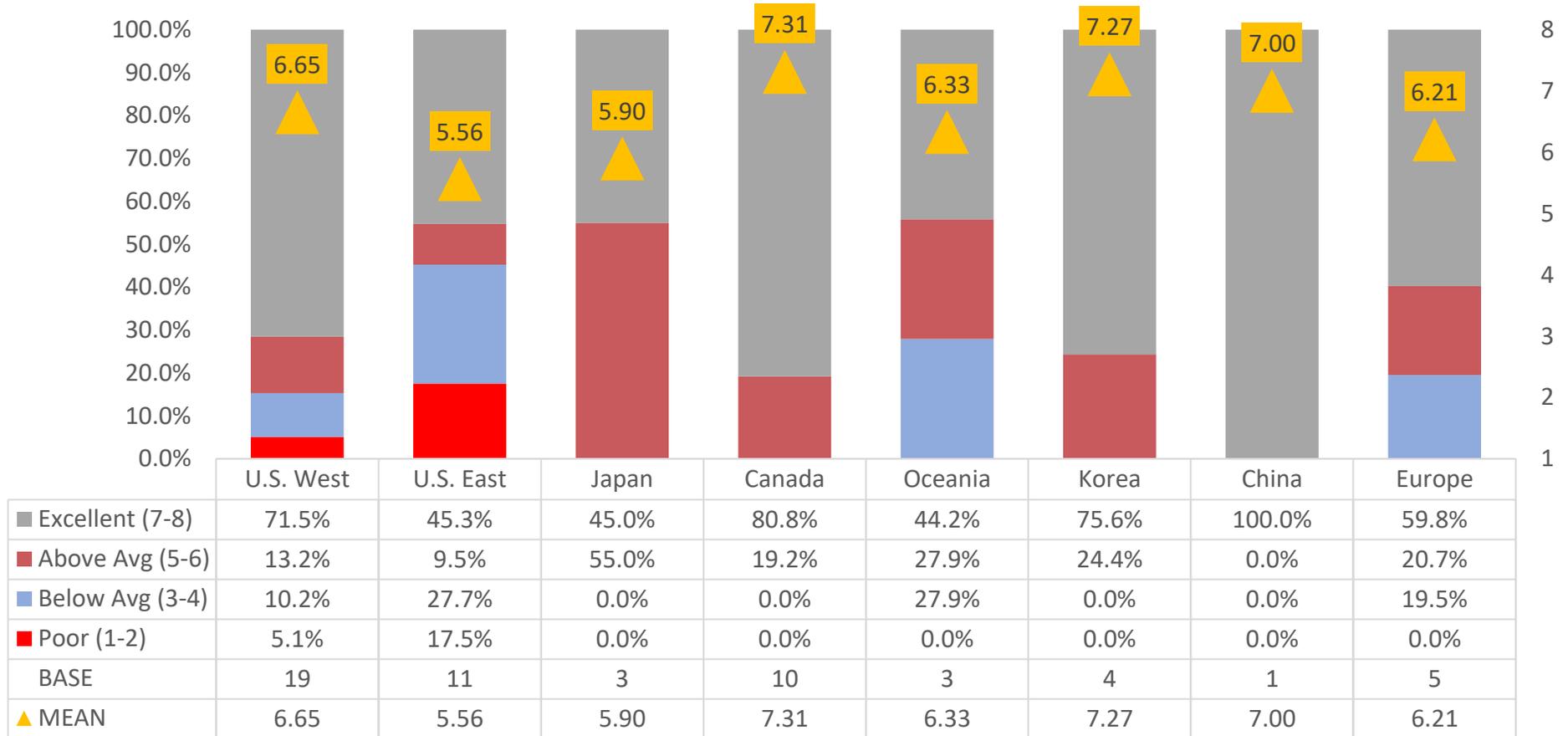
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



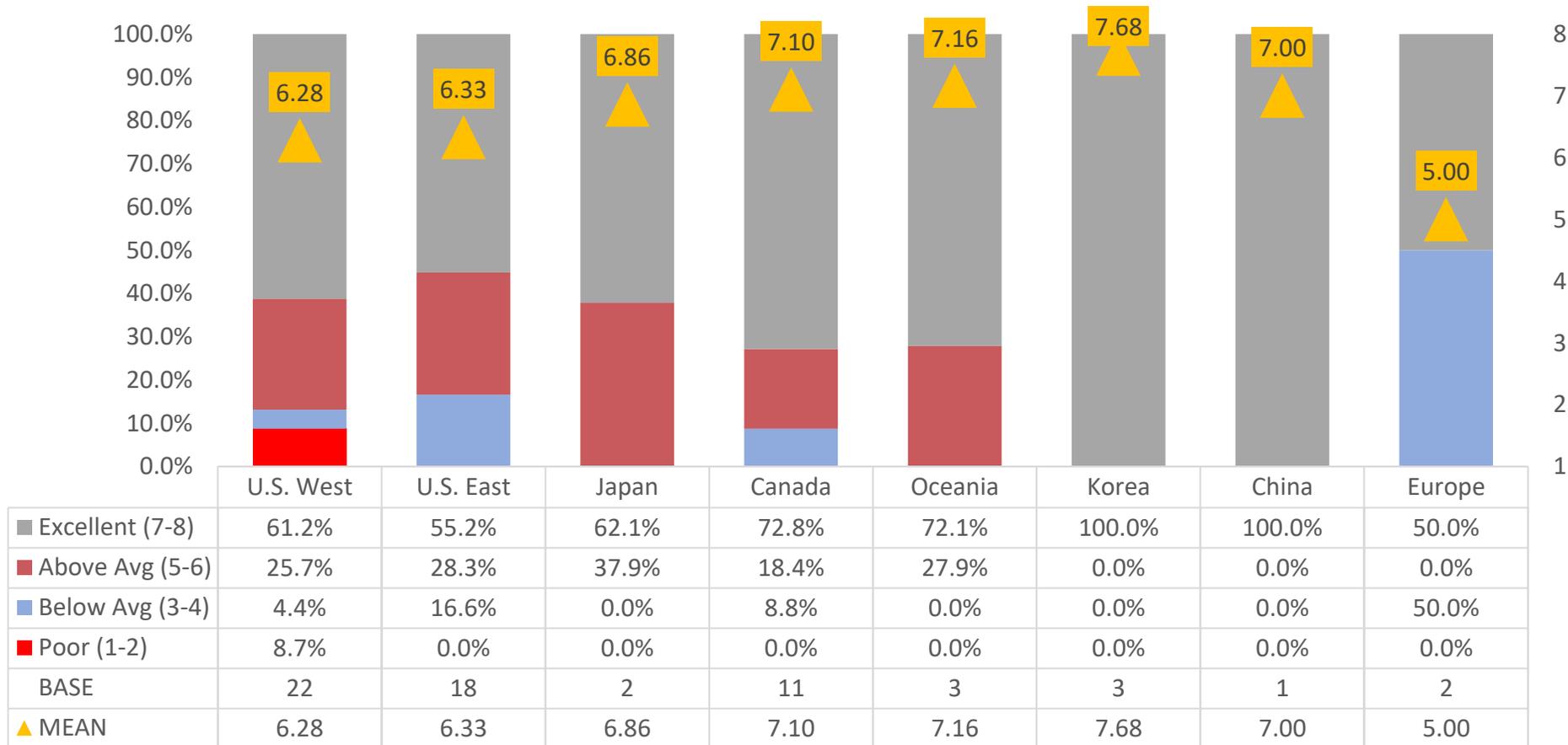
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



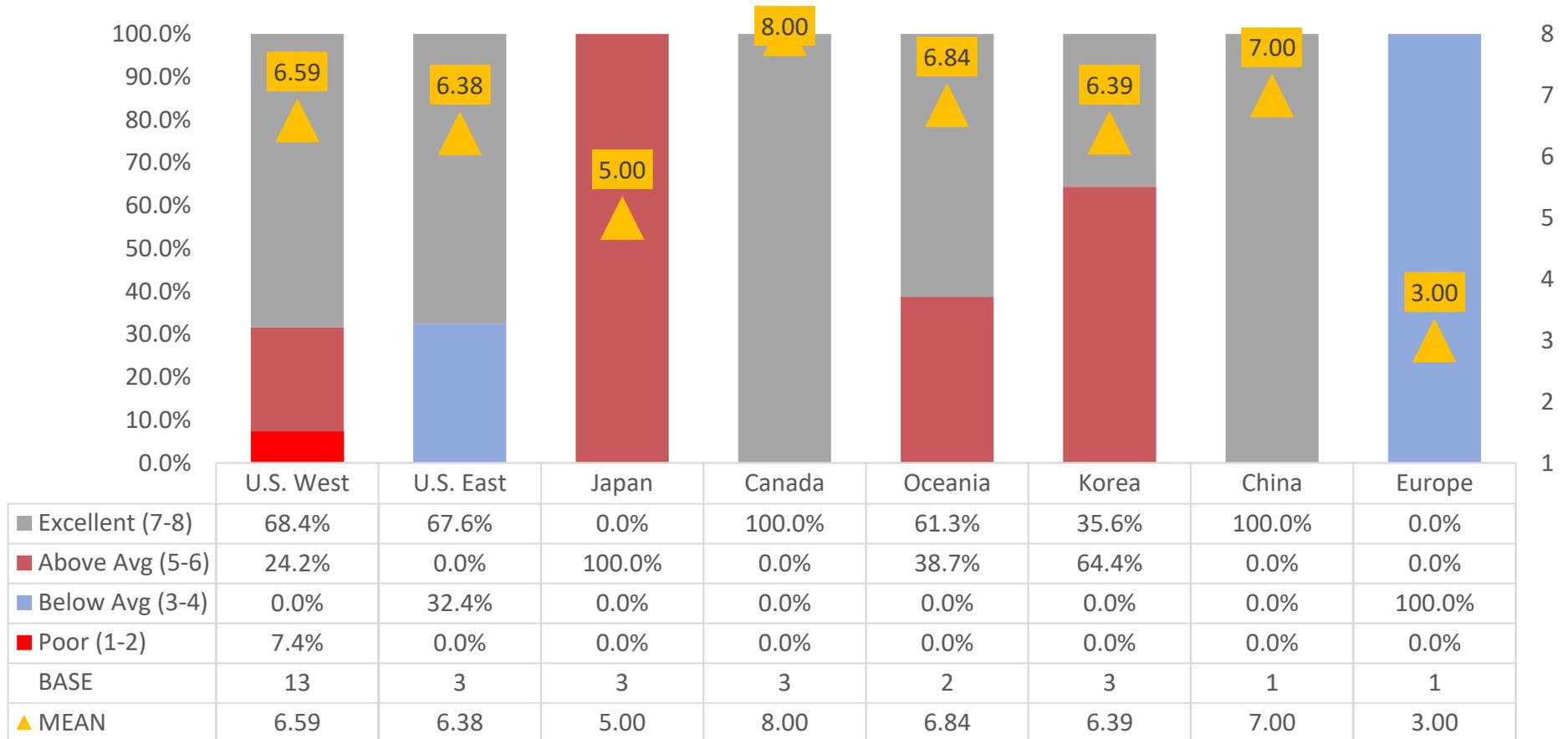
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



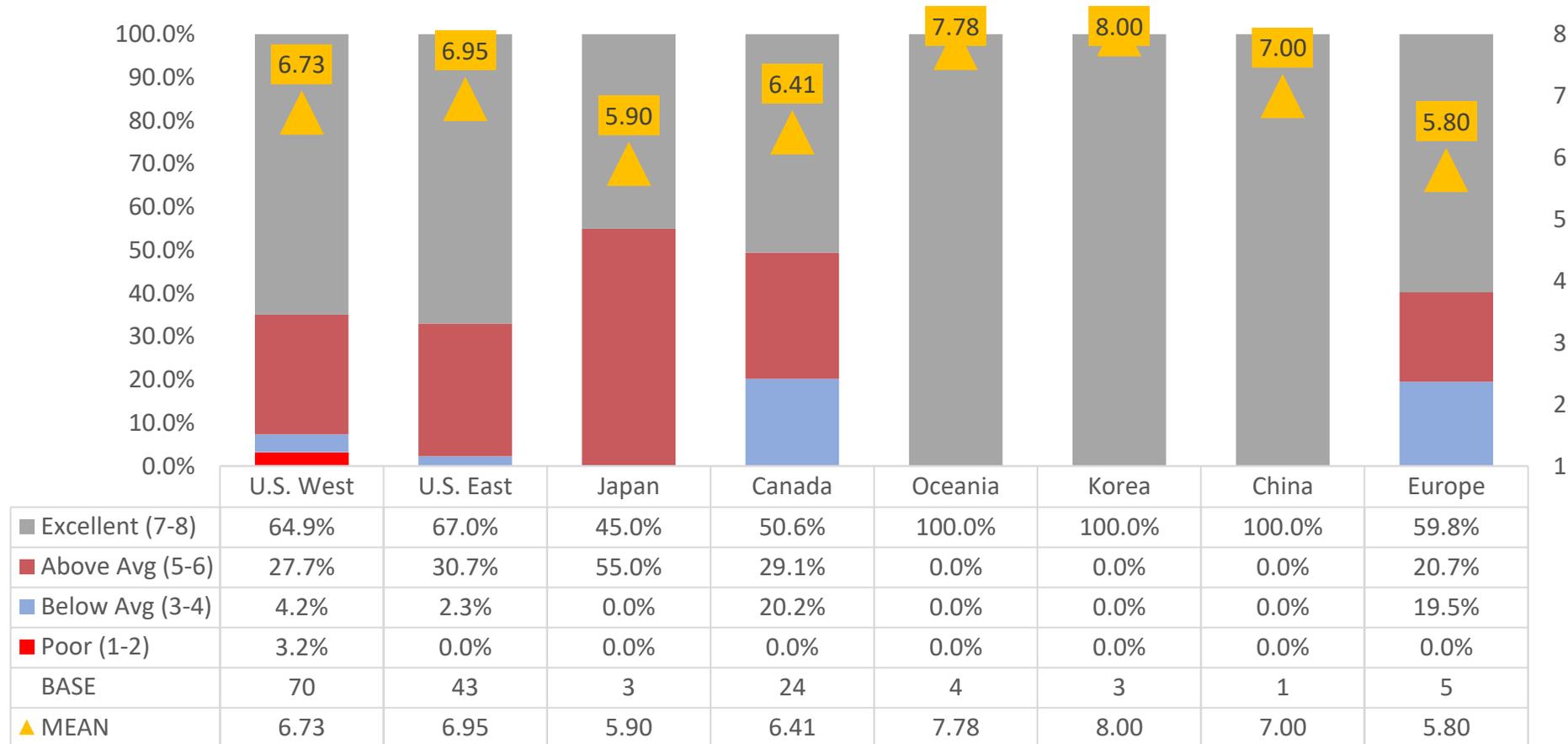
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



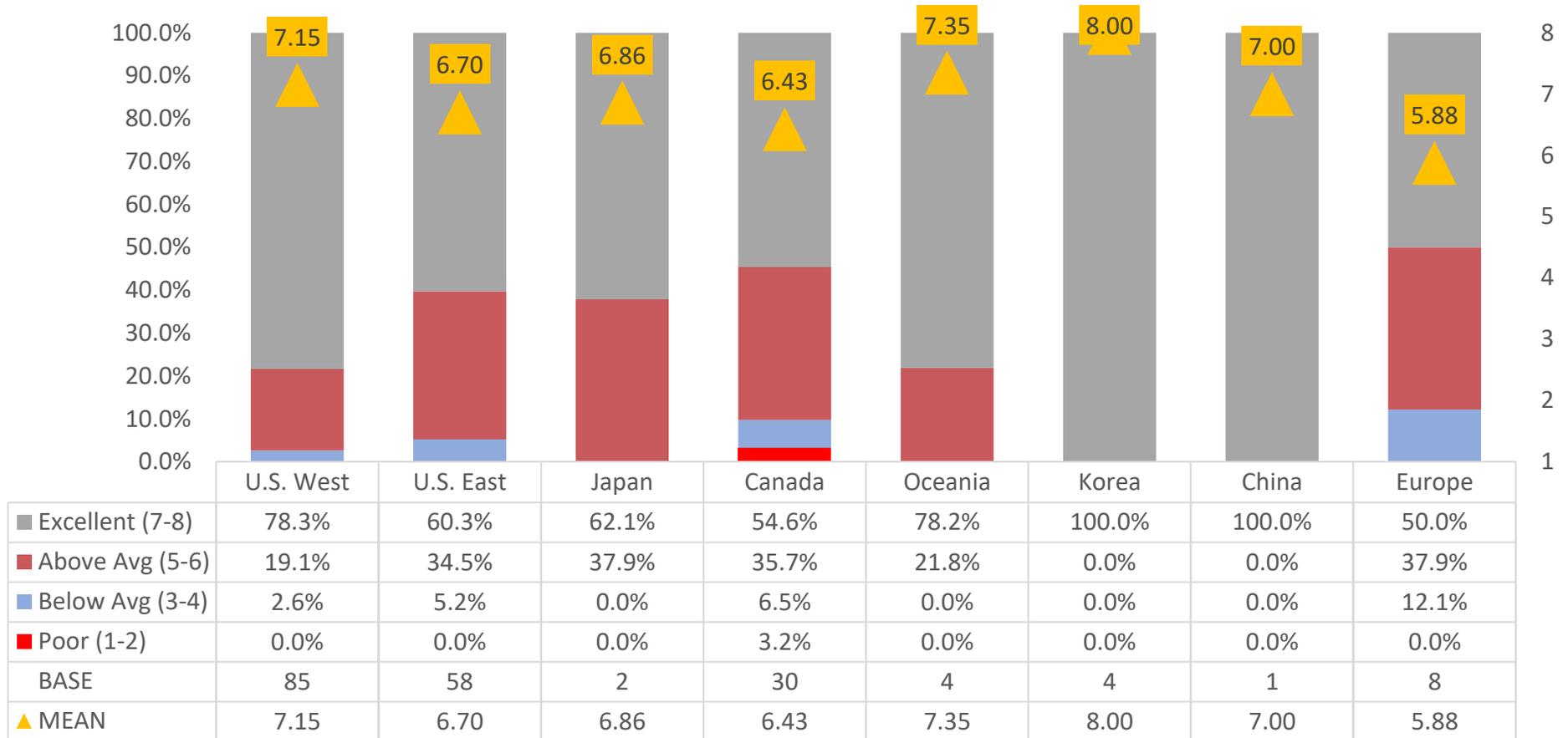
OVERALL ACCESSIBILITY - HOTELS

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



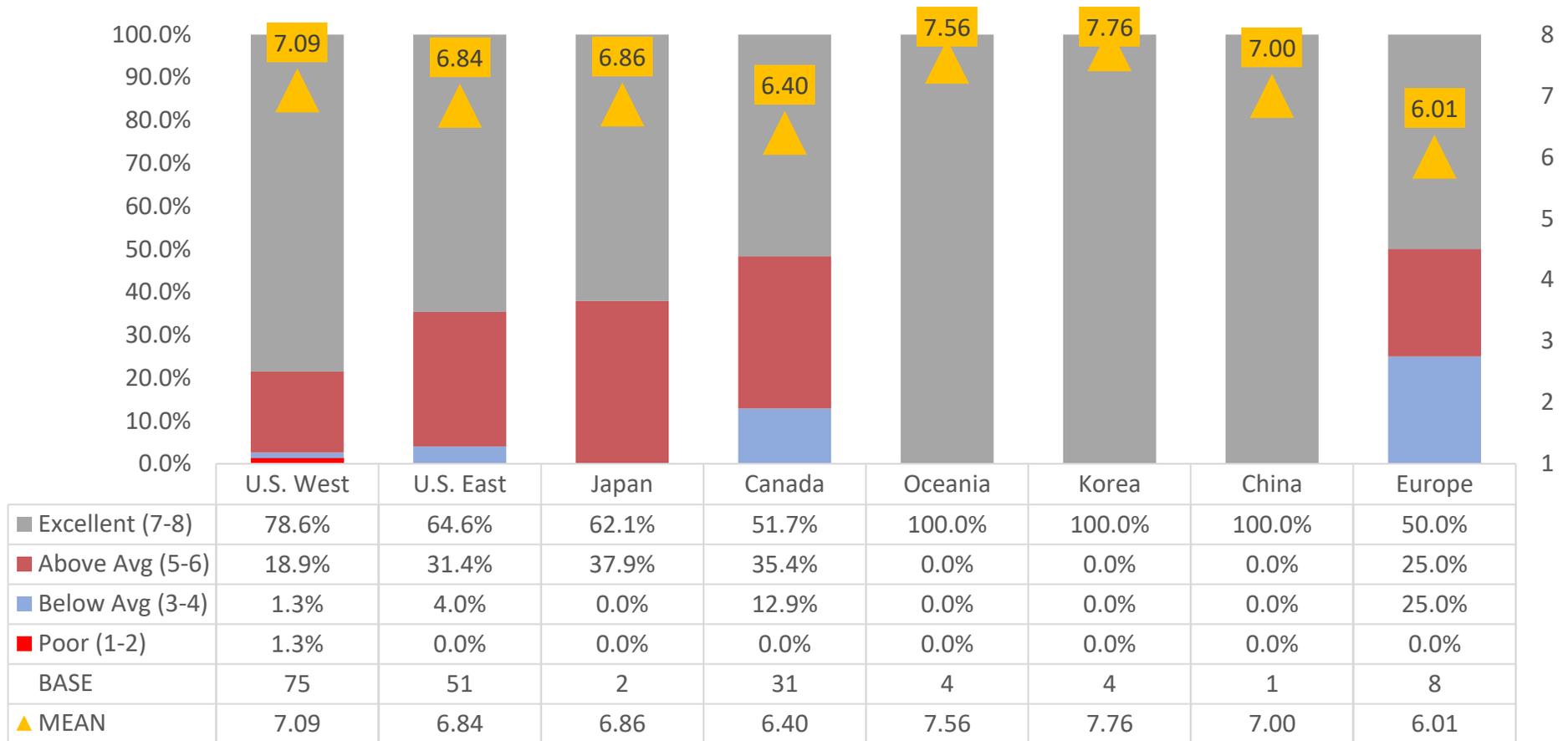
OVERALL ACCESSIBILITY - RESTAURANTS

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



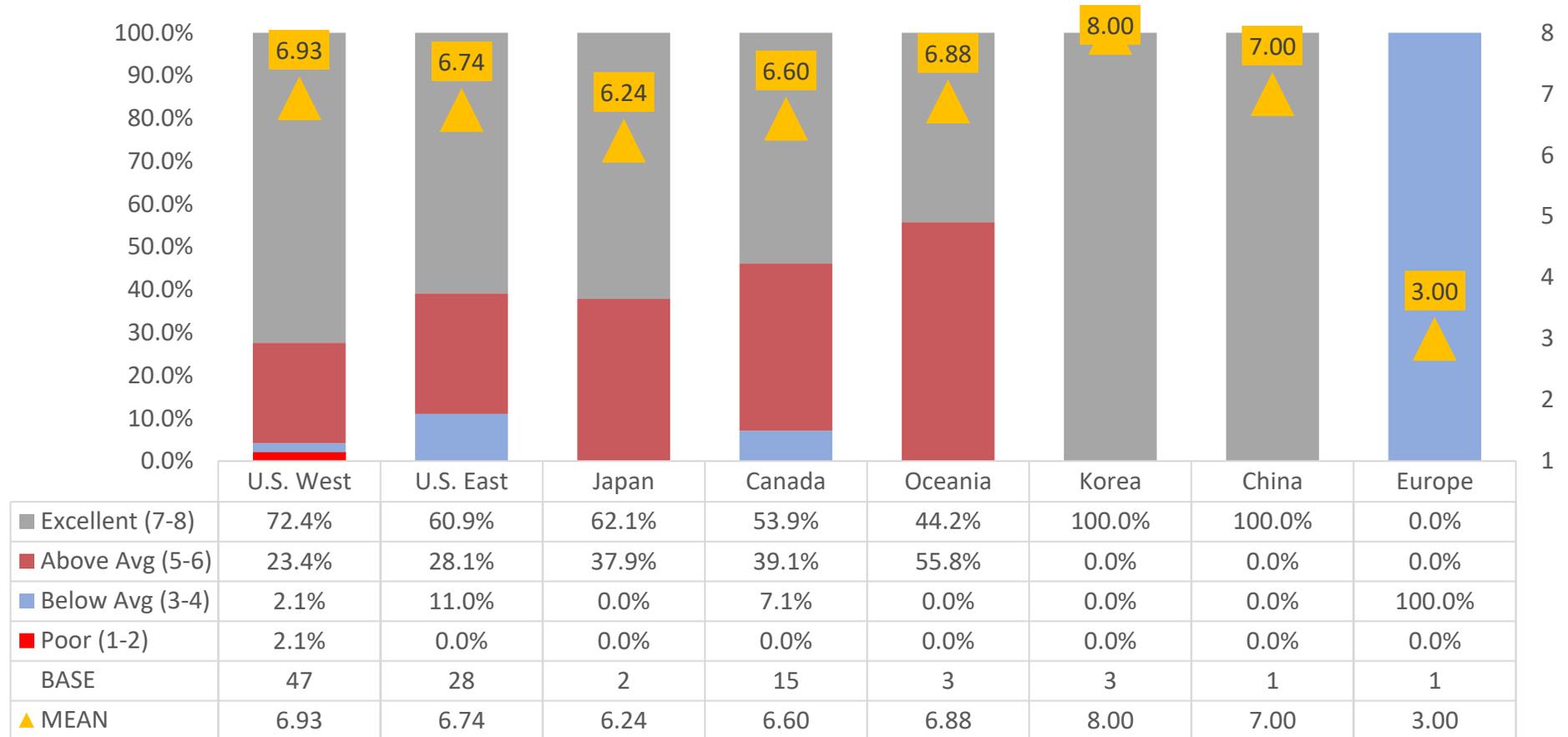
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



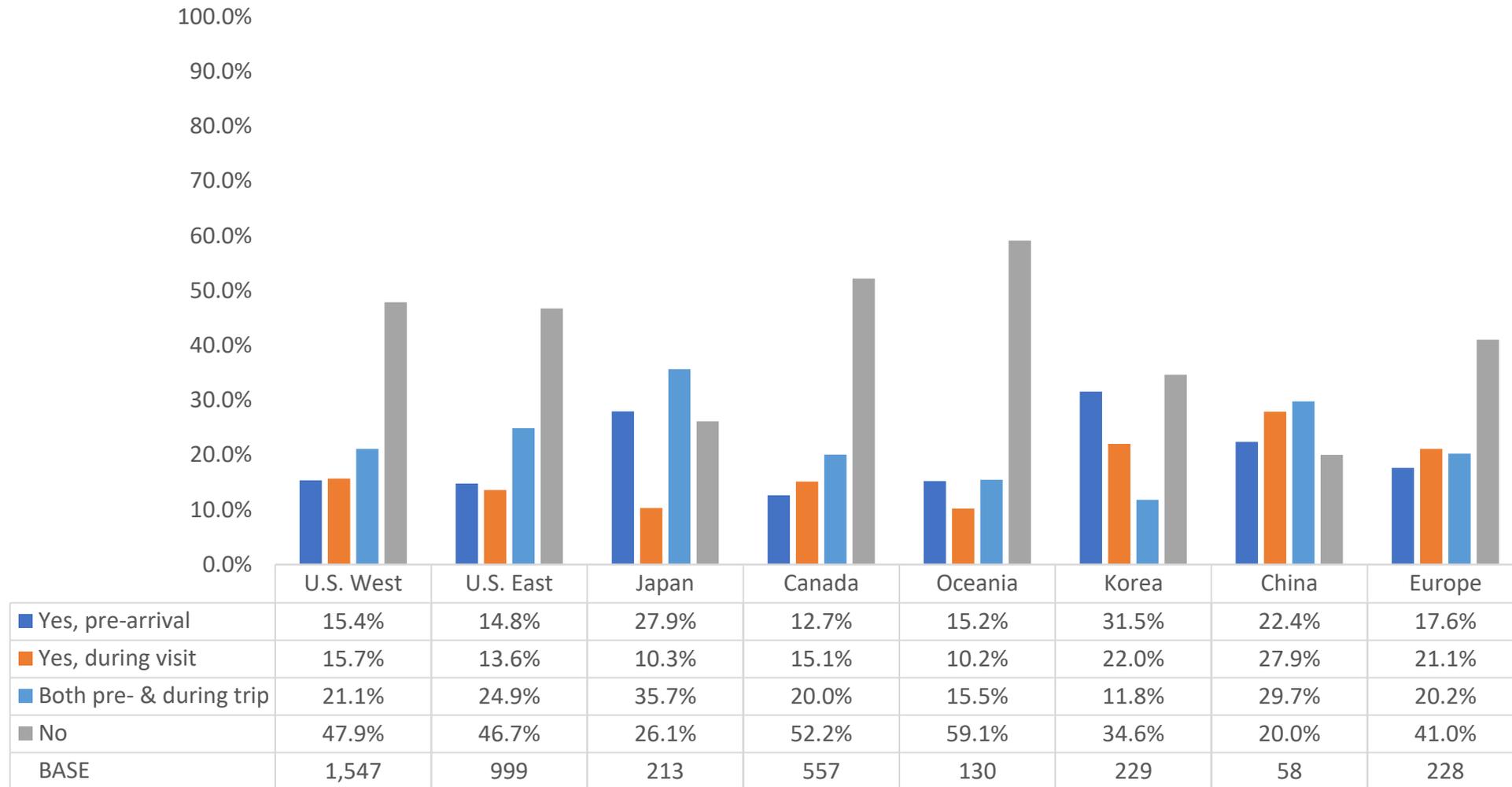
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

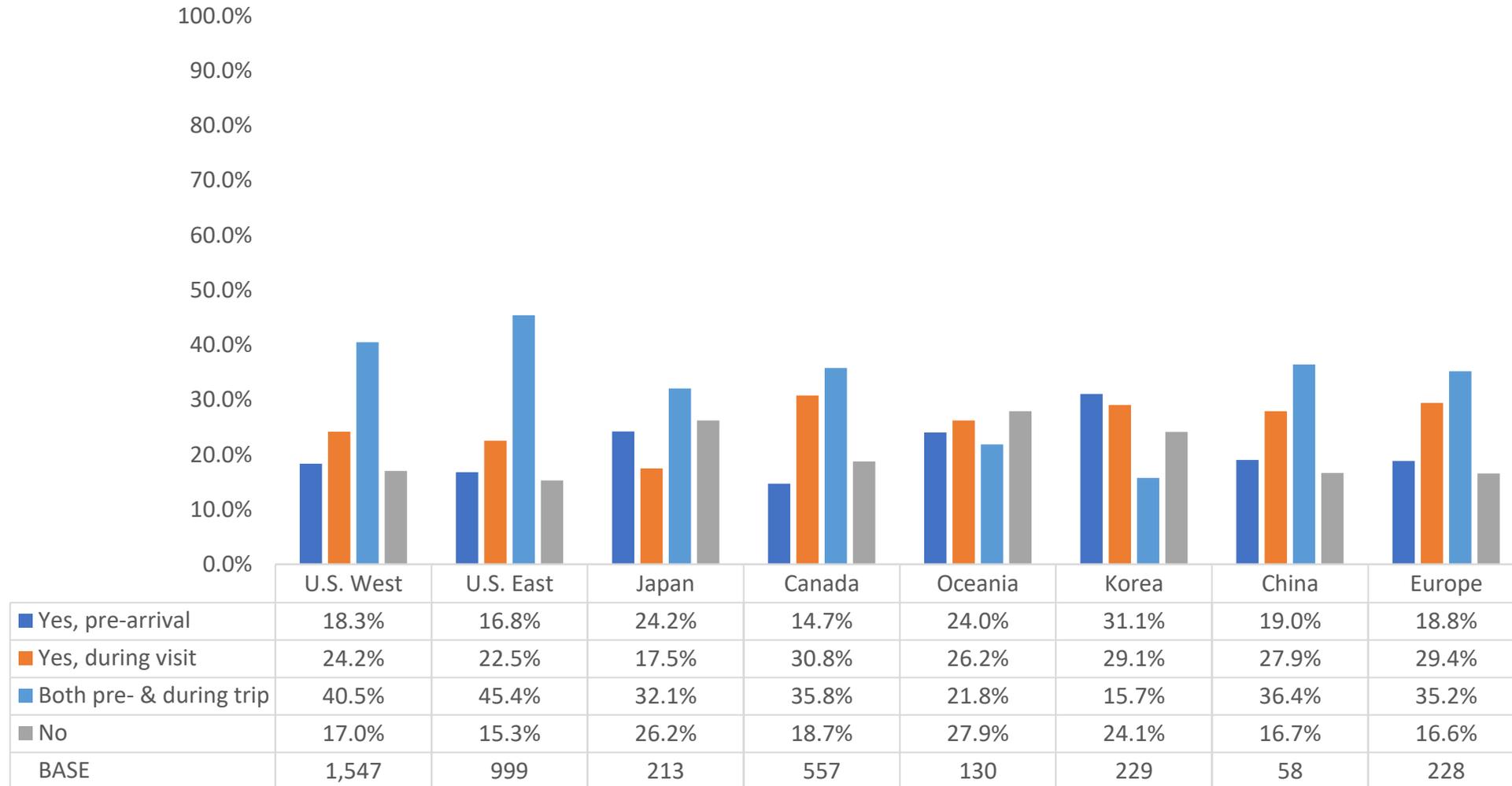


Section 4 – Messaging

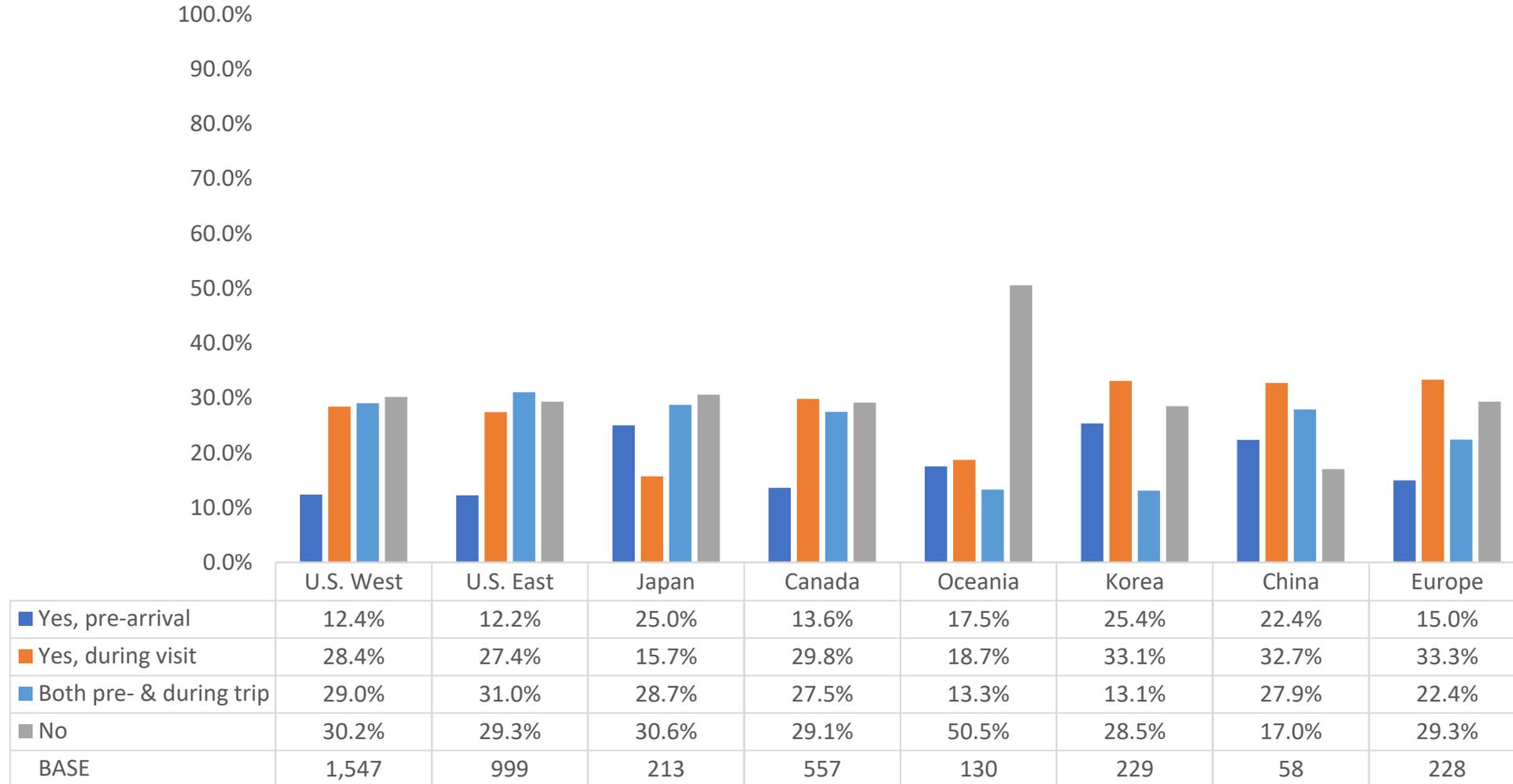
SAFE AND RESPONSIBLE TRAVEL



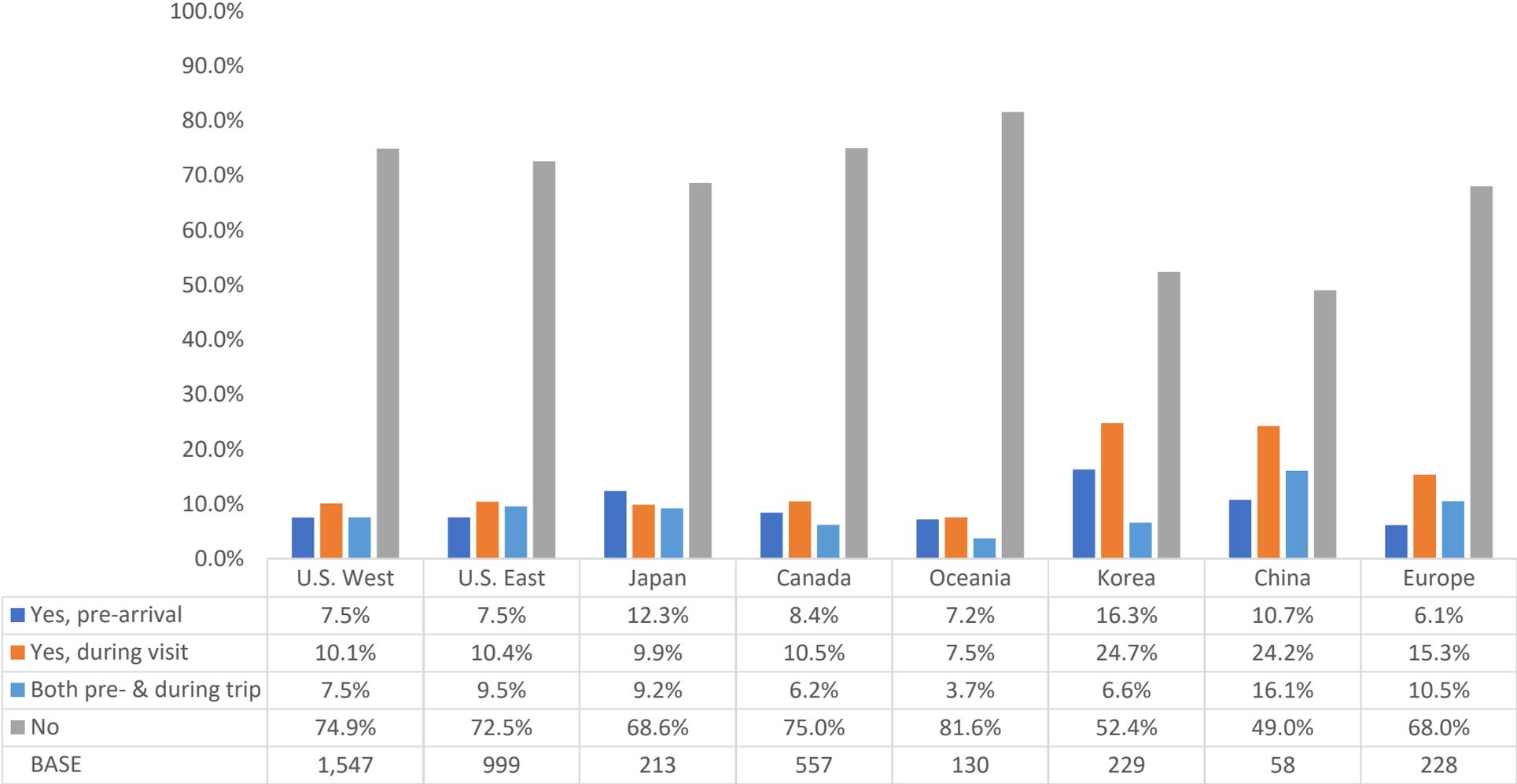
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



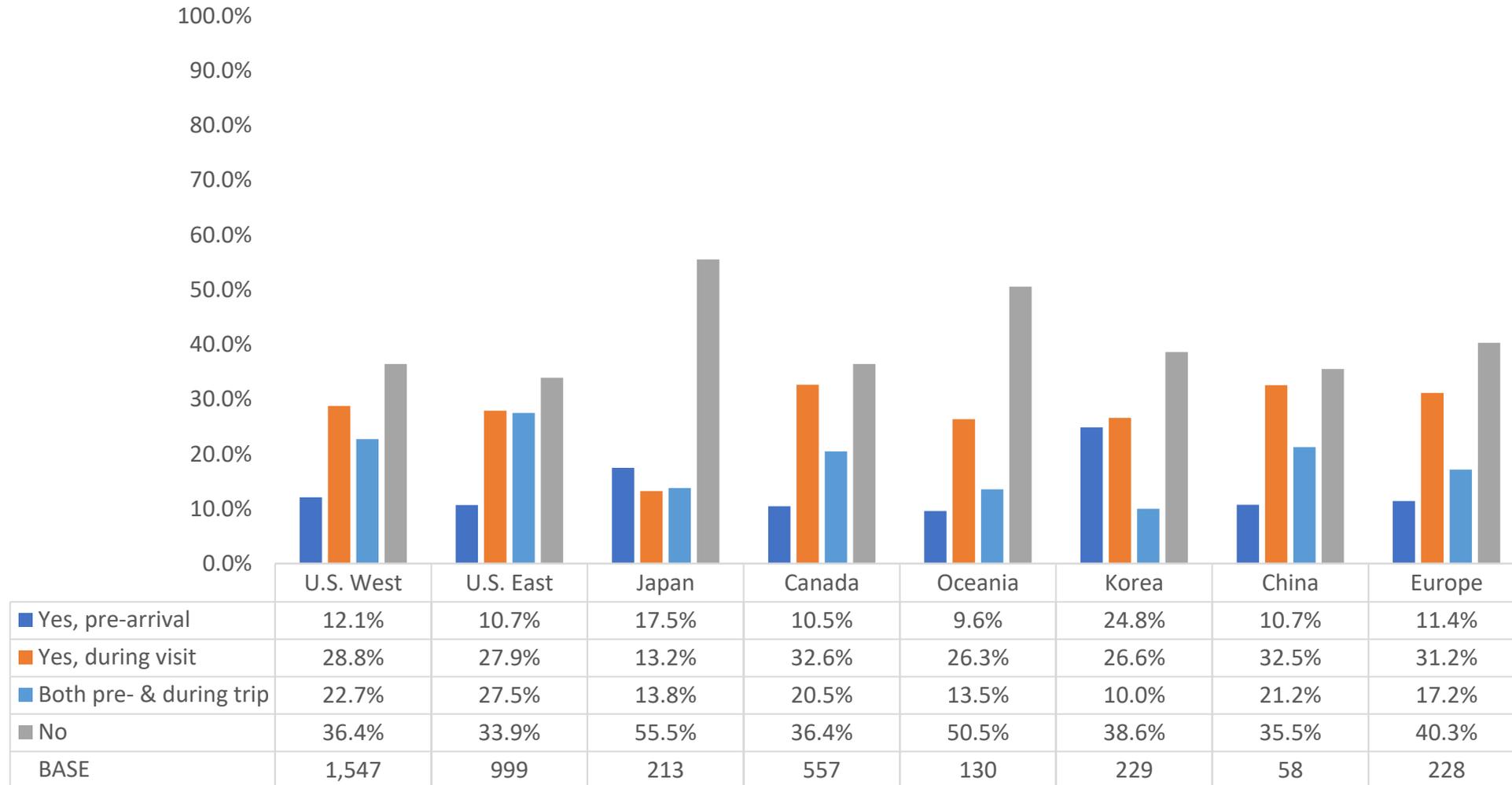
OCEAN AND HIKING SAFETY



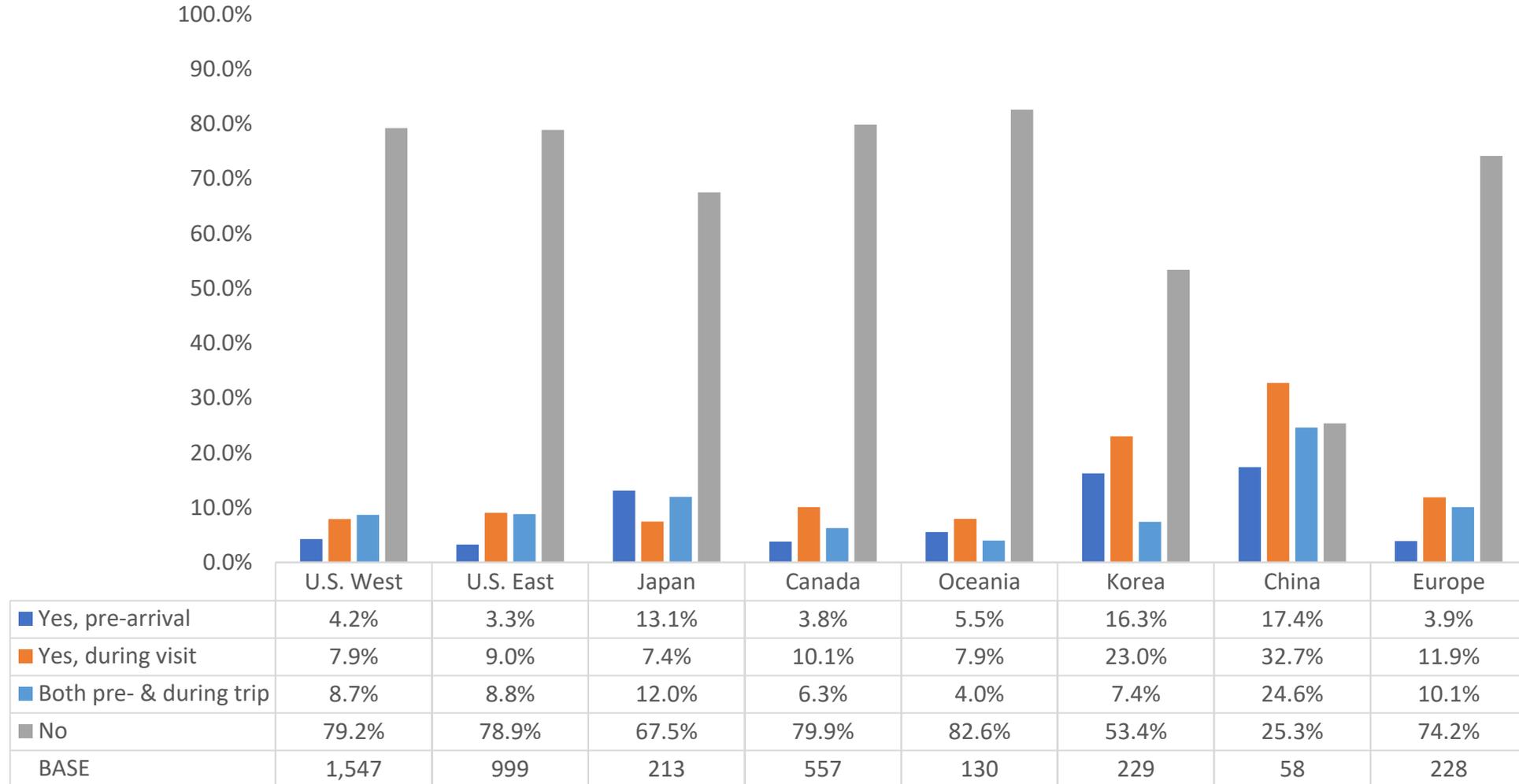
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL

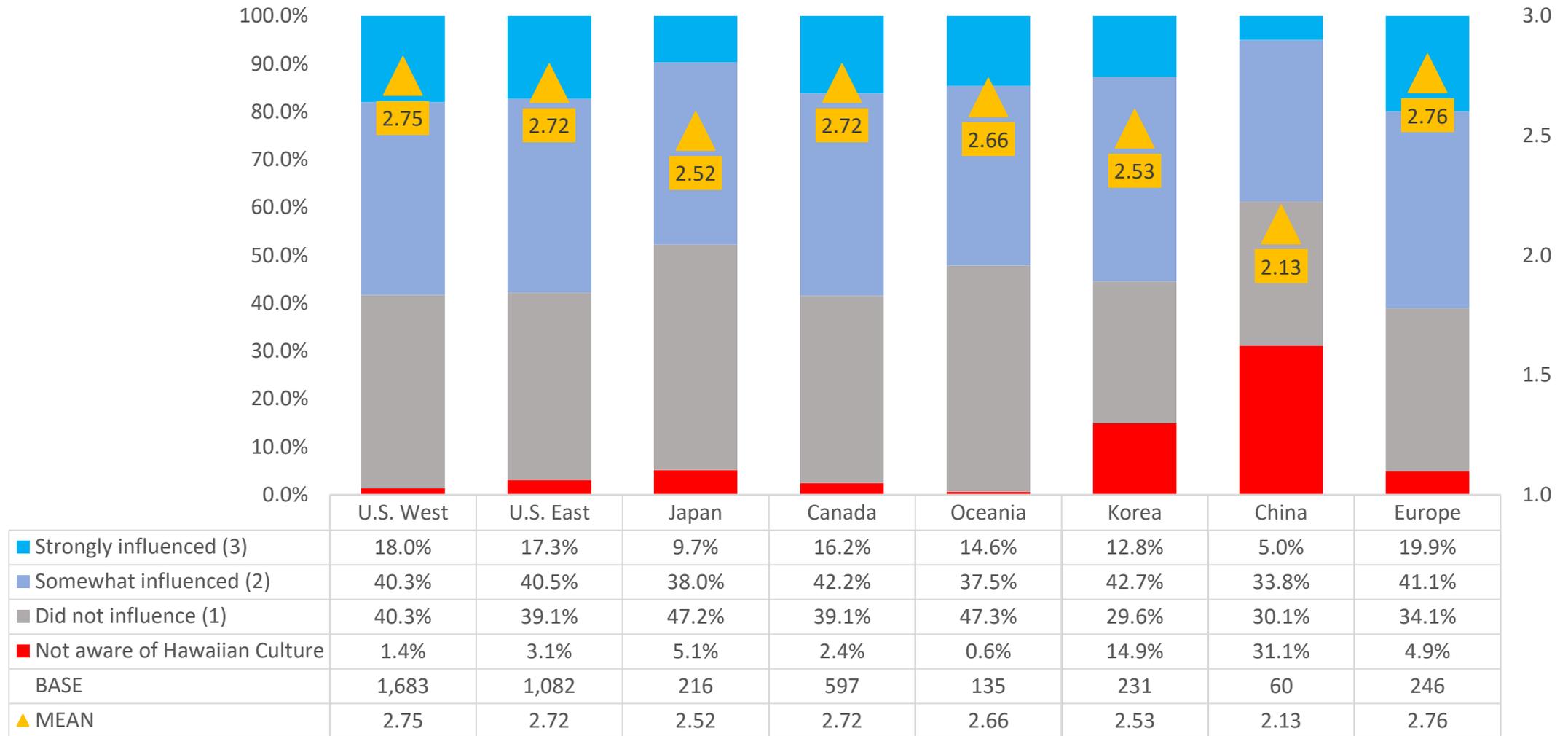


MĀLAMA HAWAI‘I



Section 5 – Hawaiian Culture

HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



Section 6 – Destination Drivers

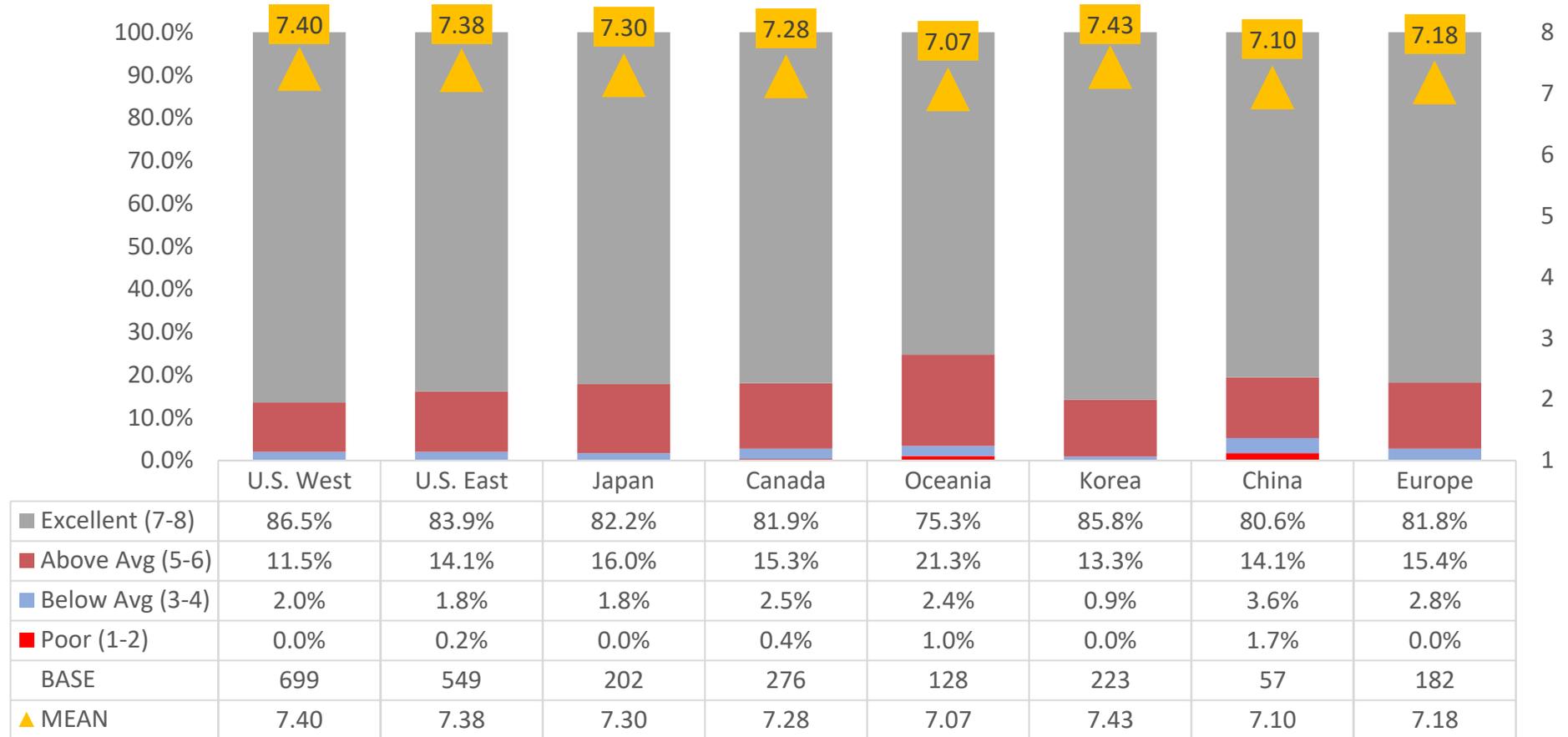
DESTINATION DRIVERS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Time with family and friends, influence of family/ friends	17.5%	17.2%	7.2%	12.6%	3.8%	7.4%	3.4%	15.1%
Personal connection, repeat visitor	14.9%	13.9%	8.2%	17.5%	5.6%	3.4%	3.6%	8.7%
Weather, climate	14.0%	10.6%	8.6%	18.7%	8.9%	12.9%	1.6%	8.9%
Personal preference, love Hawai'i	12.0%	11.6%	14.2%	14.2%	13.5%	5.5%	8.4%	11.3%
Natural beauty and scenery	8.9%	10.2%	1.4%	14.5%	7.9%	13.2%	14.9%	16.4%
Other	6.0%	5.3%	34.4%	4.1%	6.4%	33.3%	37.9%	9.0%
First-time visitor, wanted to experience HI	6.1%	11.7%	3.6%	8.3%	7.1%	5.4%	14.5%	15.0%
Special event or occasion	7.7%	9.5%	5.5%	5.8%	4.4%	1.8%	0.0%	3.3%
Convenience, proximity, location	8.9%	3.1%	4.6%	5.0%	39.4%	0.4%	3.4%	5.8%
Beaches, ocean activities	9.1%	3.8%	1.8%	7.5%	7.6%	4.9%	6.8%	4.1%
Work, business trip	5.5%	10.6%	1.8%	3.6%	1.6%	2.3%	5.4%	12.1%
BASE	1,692	1,085	216	596	135	220	60	245

Section 7 – O‘ahu

SATISFACTION - O'AHU

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

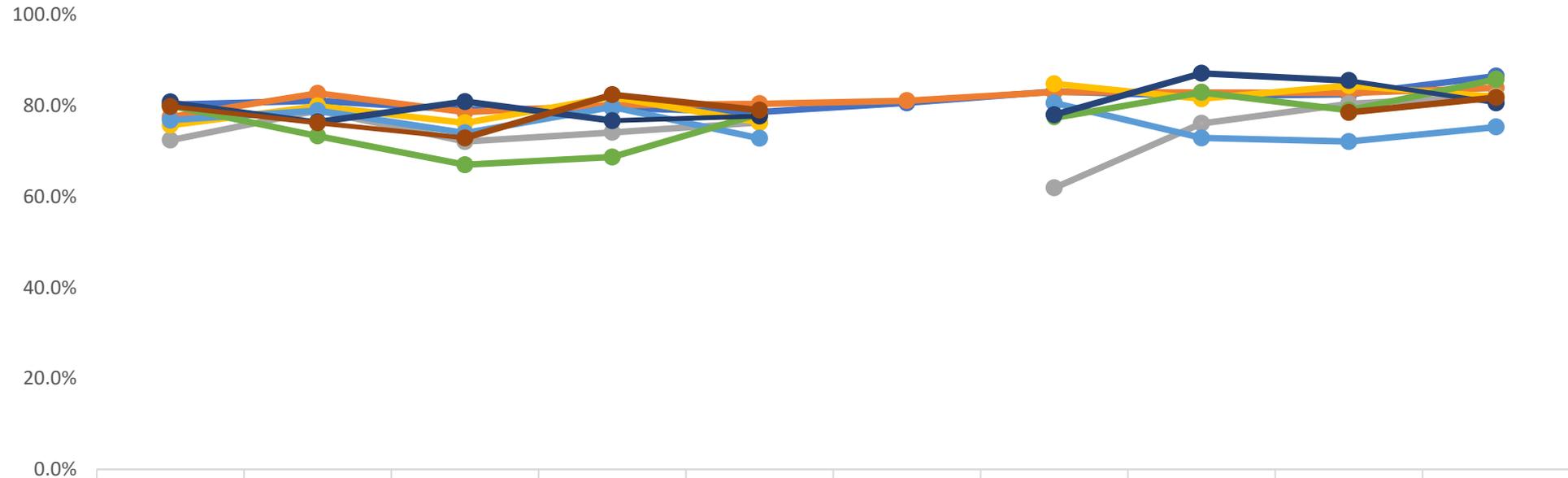


SATISFACTION - O'AHU

- **Gender:** Female respondents from **U.S. West** and **Oceania** express higher levels of satisfaction compared to male respondents from these visitor markets.
- **Age:** Seniors (65 years and older) from **Japan** give lower satisfaction scores compared to younger travelers from this visitor market.
- **Islands visited:** Visitors from **U.S. West** and **U.S. East** whose trip consisted of staying on just O'ahu give higher mean satisfaction score compared to those whose trip consisted of stops on multiple islands.
- **Household income:** Those who reside in homes in the bottom income tier (<\$100K) from **Oceania** give higher satisfaction scores than more affluent travelers from this visitor market.
- **Education:** College graduates from **Japan** are more satisfied with their stay than those without a college degree from this visitor market.

SATISFACTION - O‘AHU

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	80.2%	81.1%	79.1%	79.5%	78.6%	80.6%	83.1%	82.1%	82.5%	86.5%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.4%	81.1%	83.0%	82.9%	82.8%	83.9%
Japan	72.4%	78.9%	72.1%	74.1%	76.3%		61.9%	76.1%	80.4%	82.2%
Canada	75.7%	79.9%	76.2%	81.9%	76.3%		84.8%	81.5%	84.4%	81.9%
Oceania	76.8%	78.9%	74.0%	79.7%	72.8%		80.6%	72.9%	72.1%	75.3%
Korea	80.0%	73.3%	67.0%	68.7%	78.2%		77.3%	82.9%	79.0%	85.8%
China	80.8%	76.4%	80.9%	76.7%	77.7%		78.0%	87.1%	85.5%	80.6%
Europe	79.8%	76.2%	72.9%	82.4%	79.0%				78.5%	81.8%

P= Preliminary Data

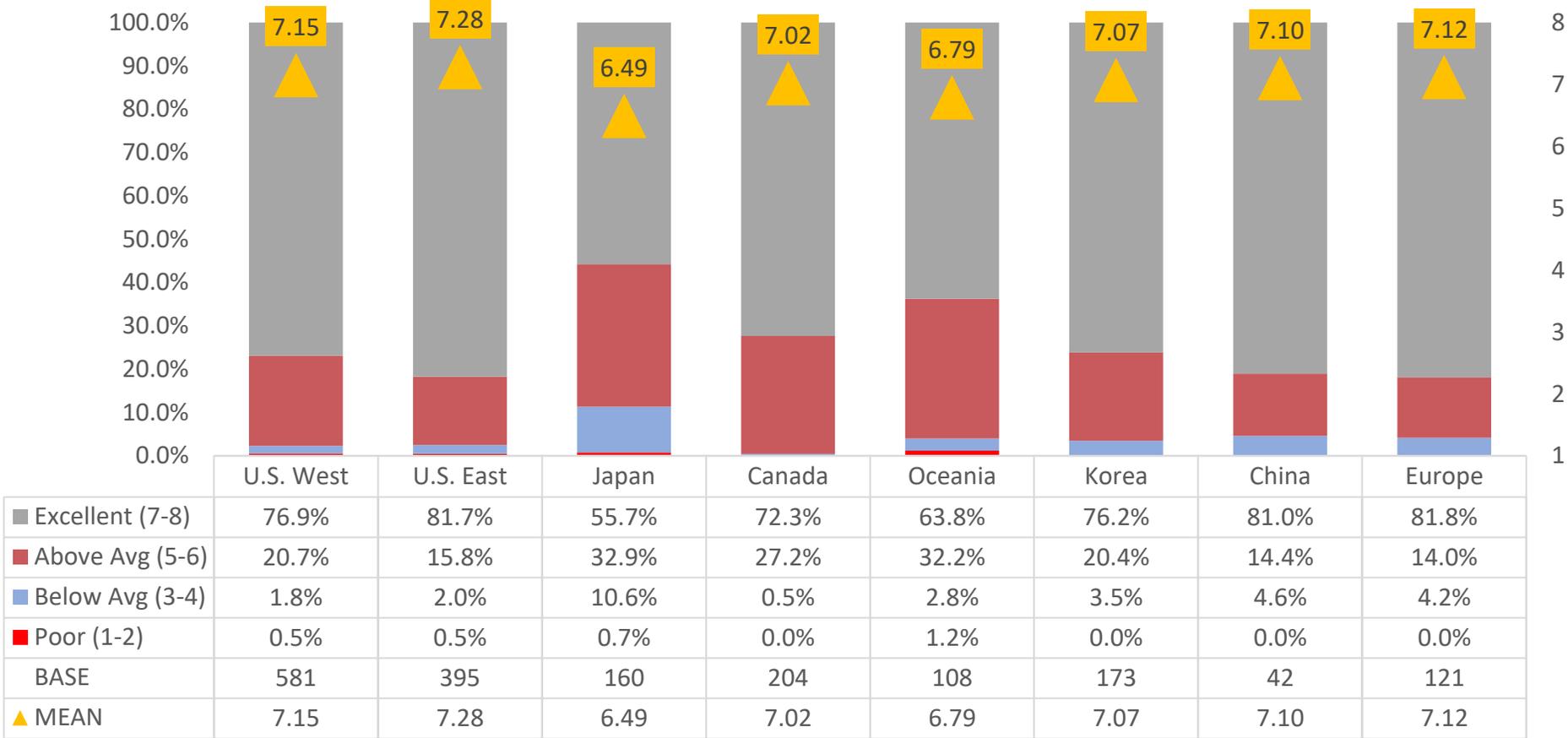
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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



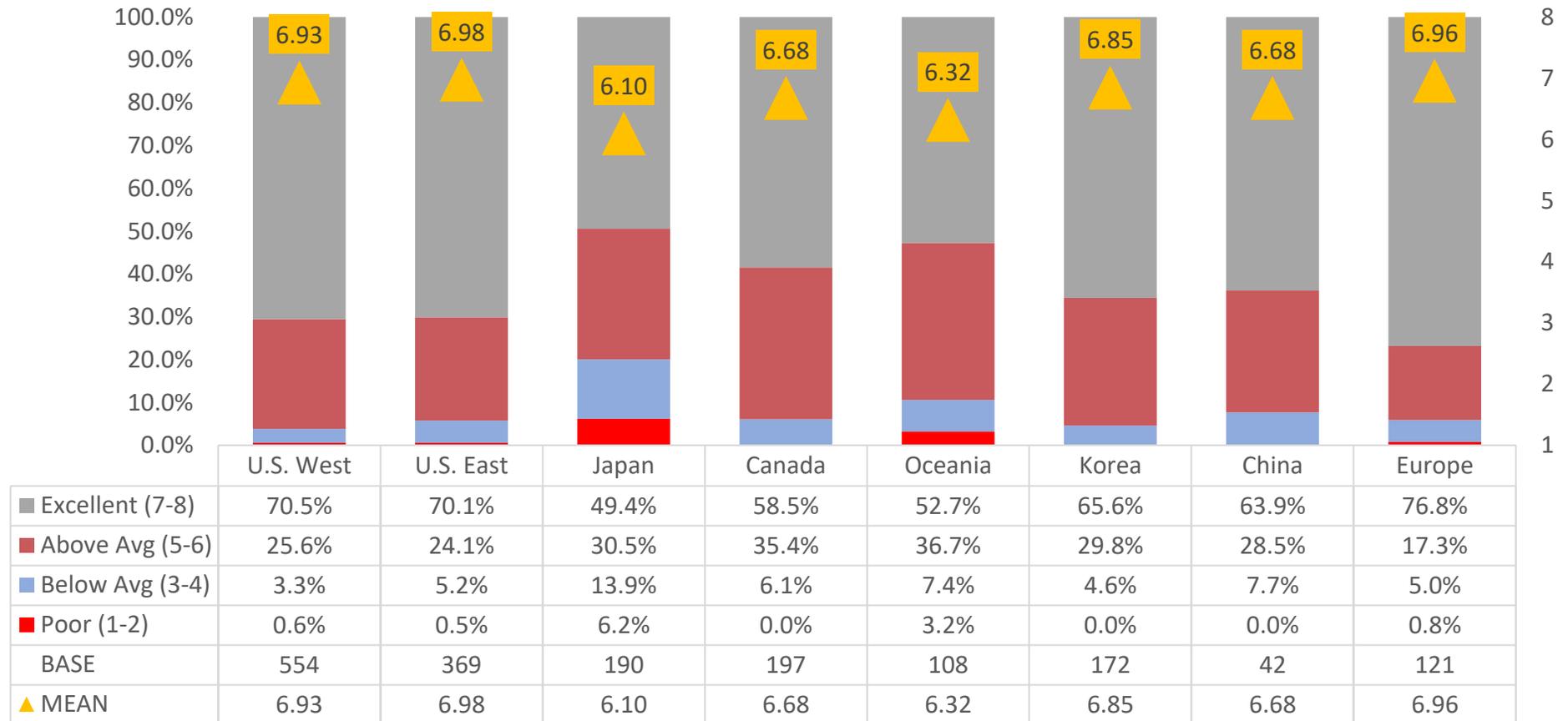
ENTERTAINMENT/ ATTRACTIONS - O‘AHU

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



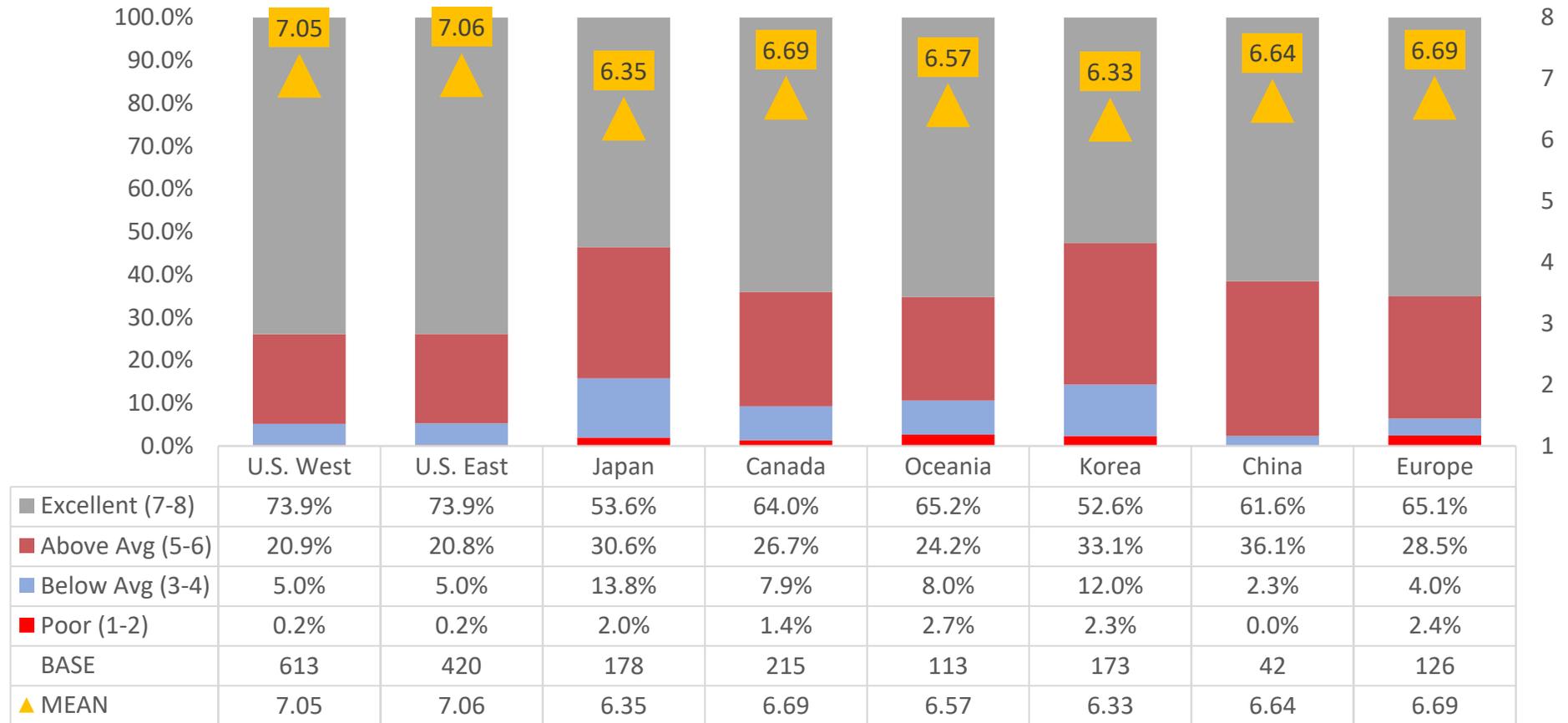
SHOPPING - O‘AHU

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



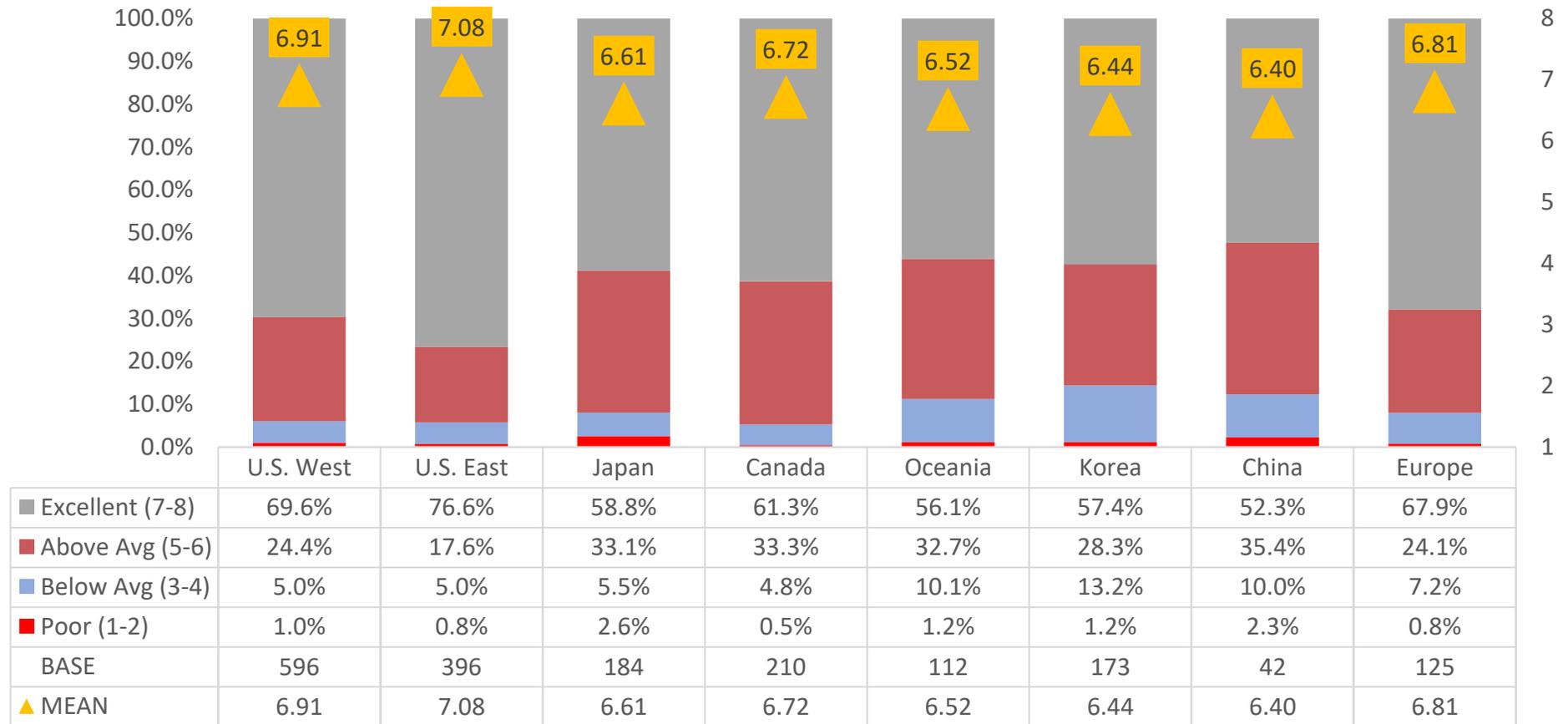
DINING/ FOOD & BEVERAGES - O'AHU

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



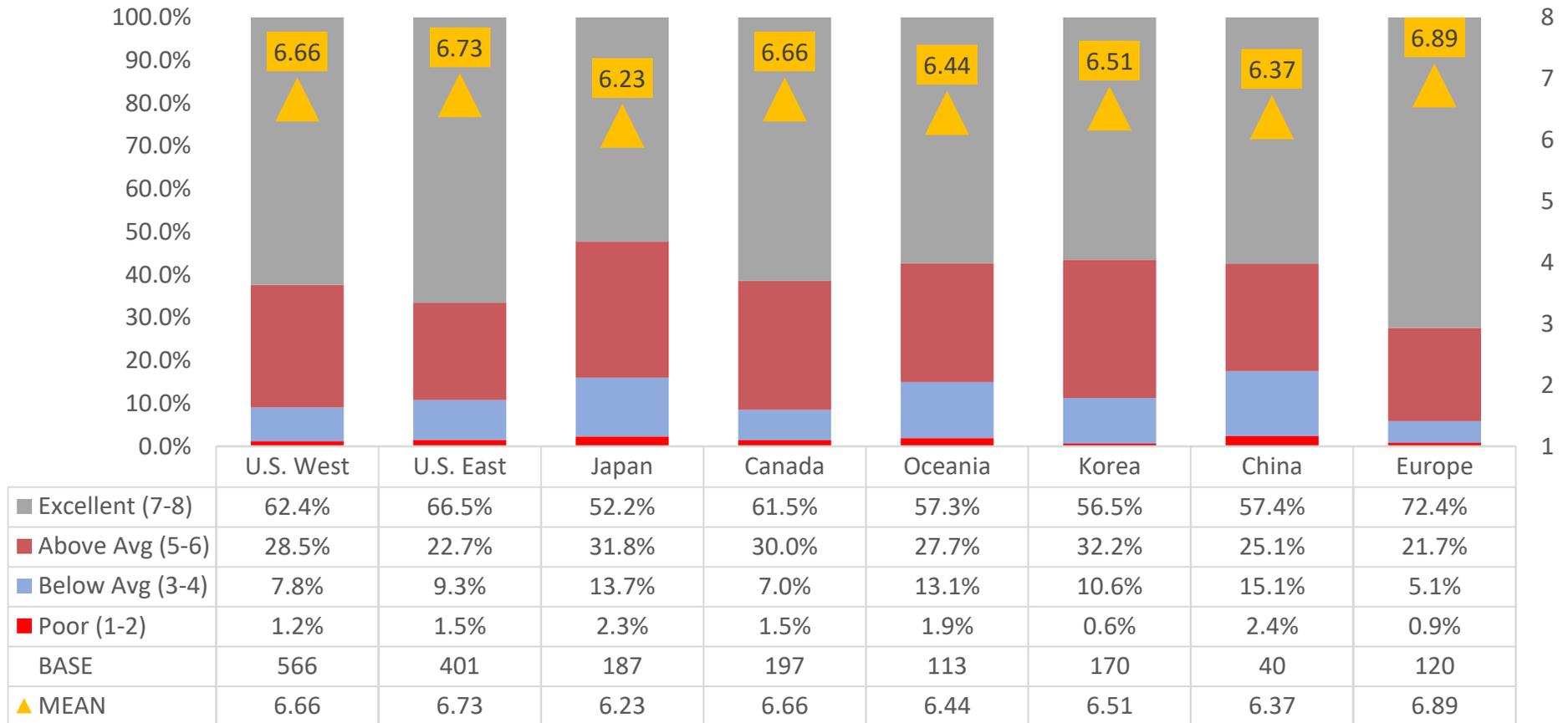
LODGING/ ACOMMODATIONS - O‘AHU

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



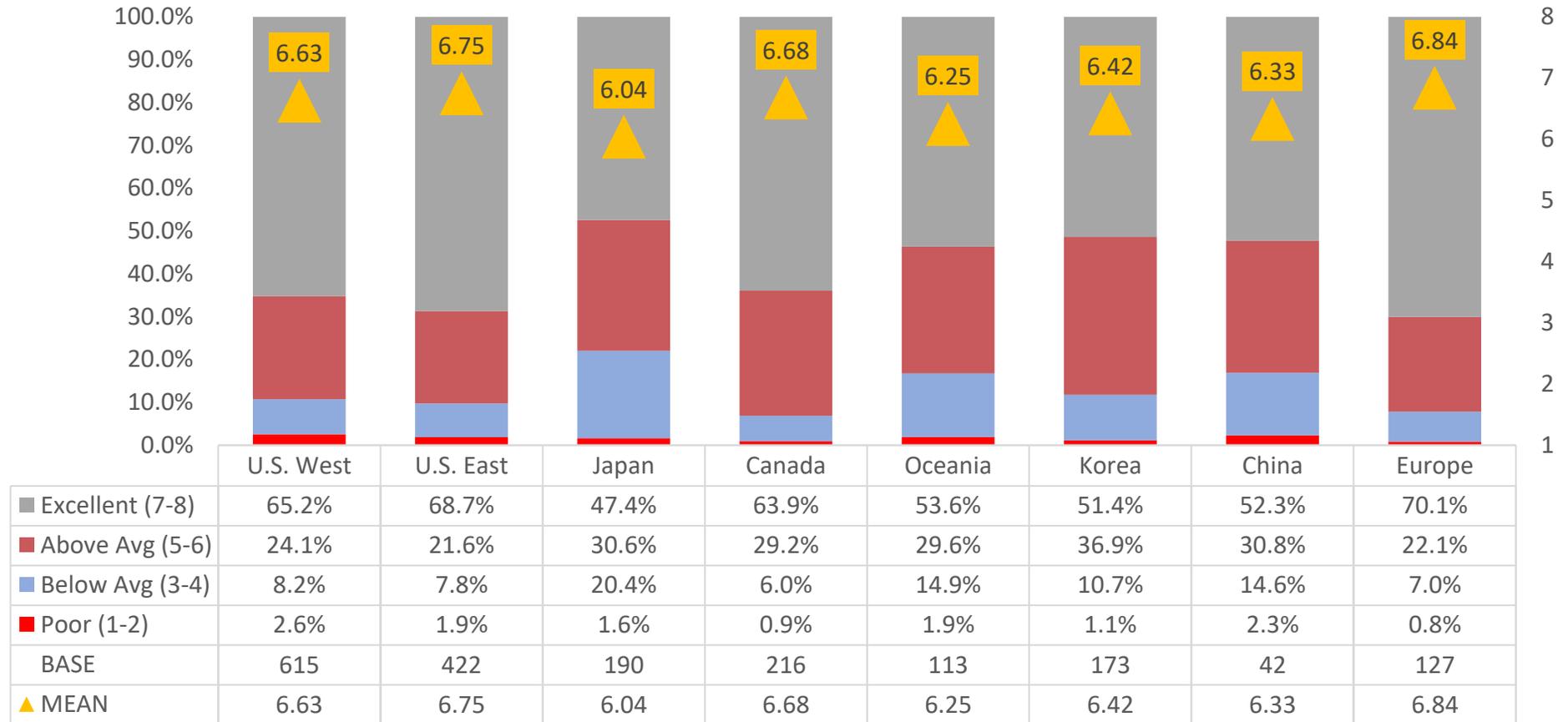
TRANSPORTATION ON ISLAND - O‘AHU

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



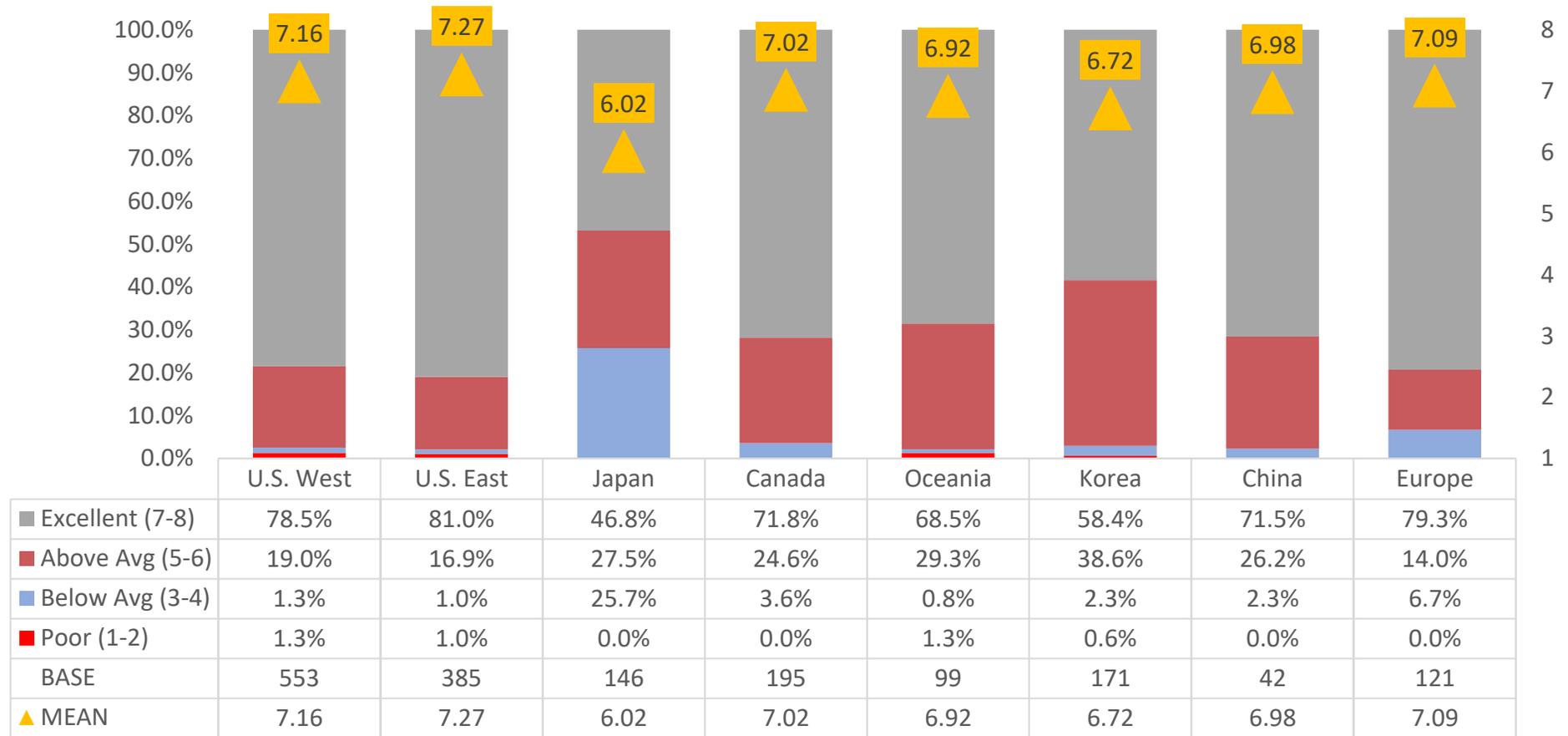
AIRPORT - O'AHU

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



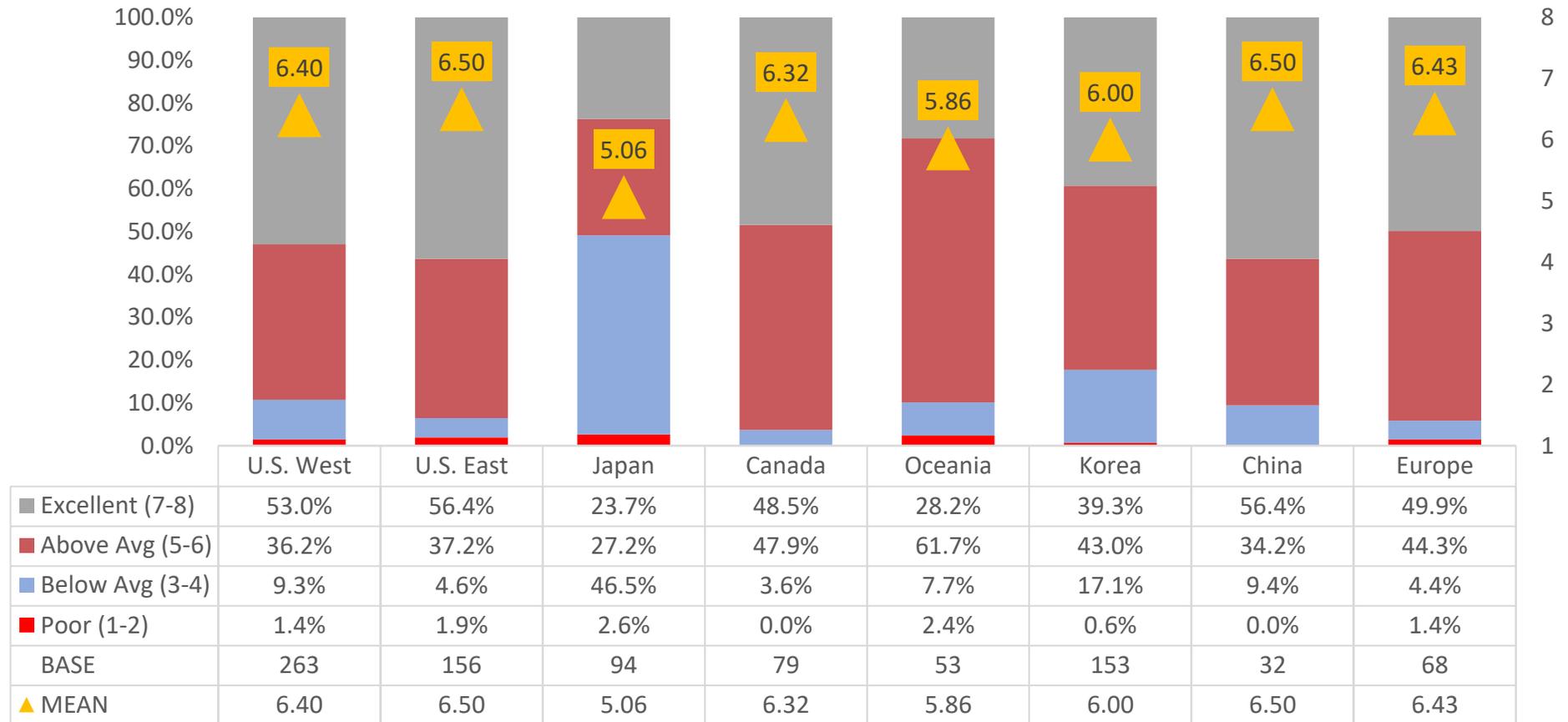
CULTURAL EXPERIENCES - O'AHU

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



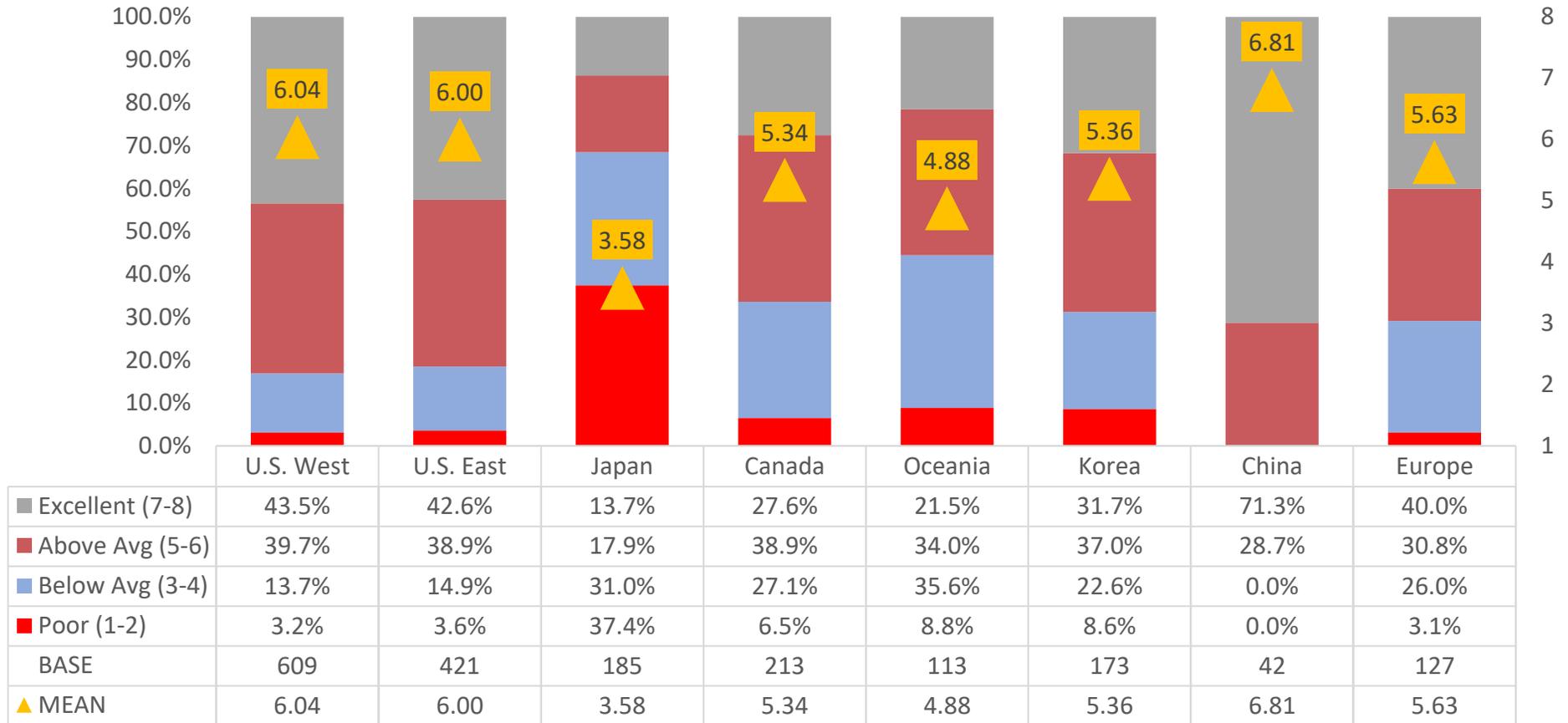
VOLUNTEER EXPERIENCES - O'AHU

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



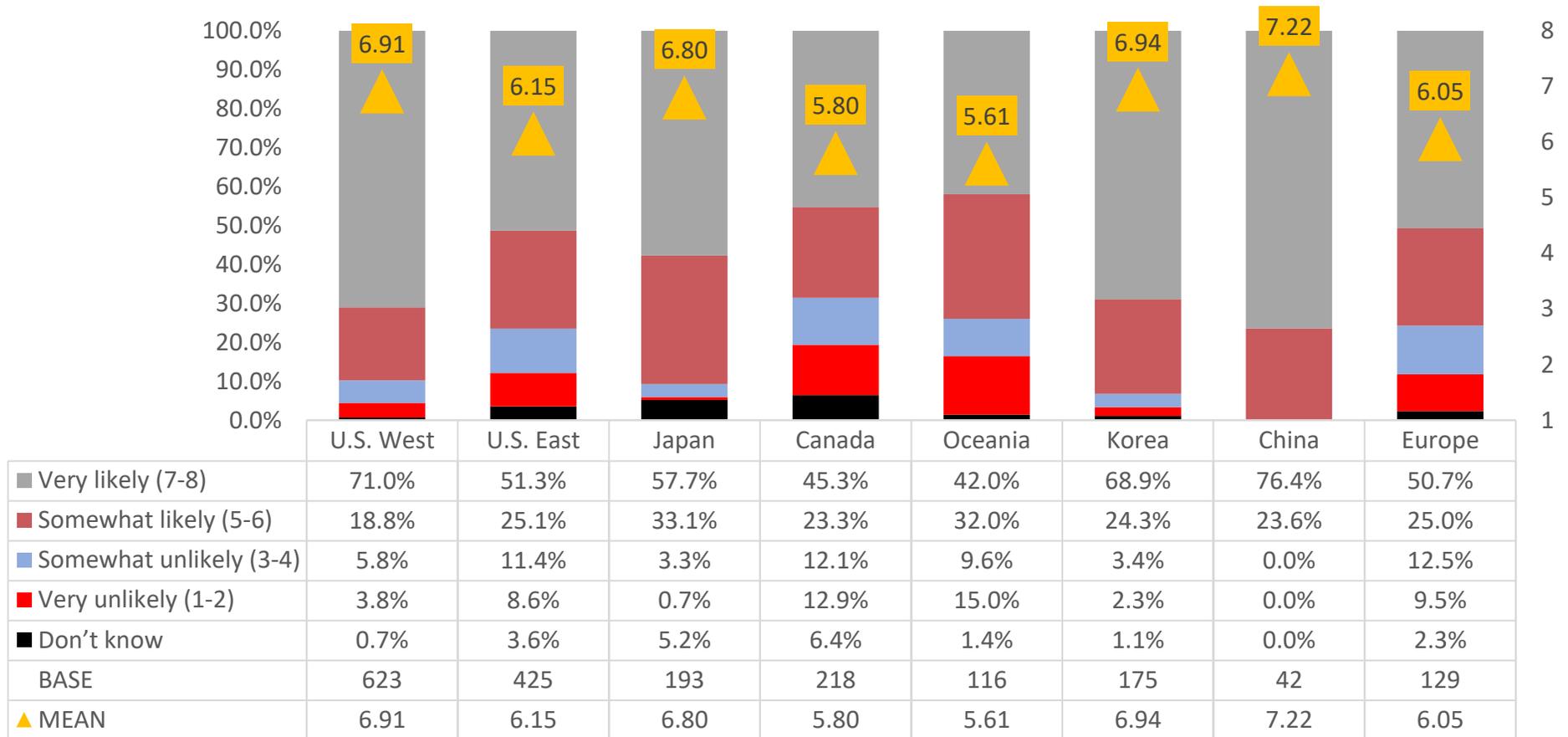
OVERALL VALUE FOR THE MONEY - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

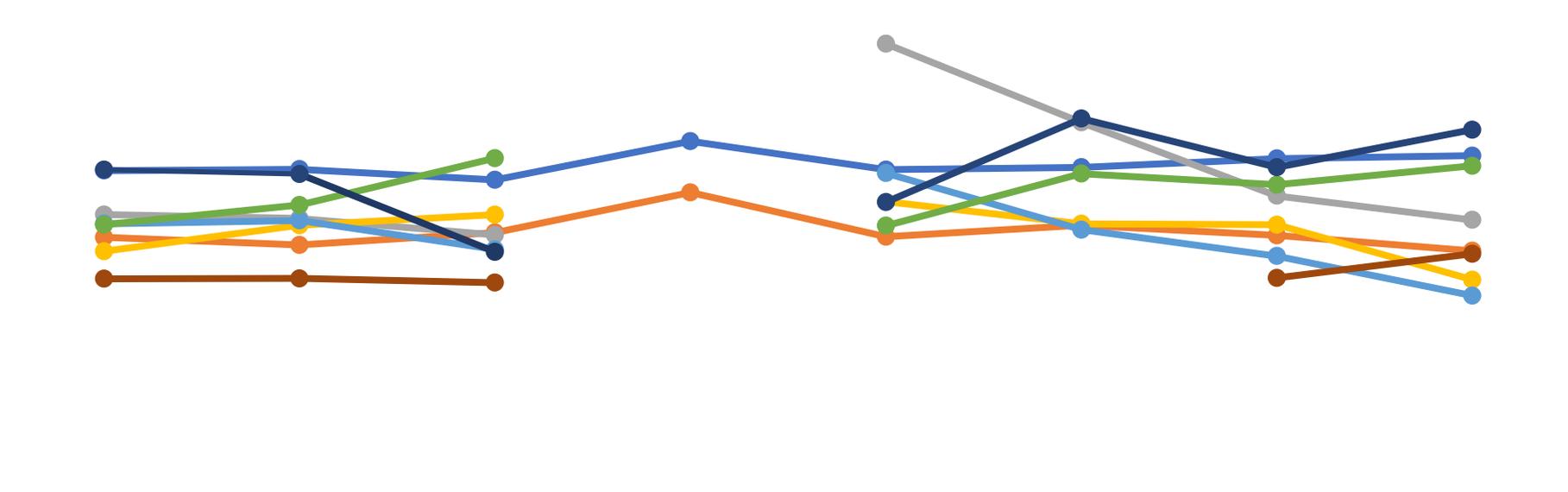
8-pt Rating Scale
8 = Excellent / 1 = Poor



LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)

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



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	67.9%	68.2%	66.0%	74.0%	68.1%	68.6%	70.4%	71.0%
U.S. East	54.1%	52.5%	55.1%	63.4%	54.2%	56.6%	54.5%	51.3%
Japan	58.8%	58.0%	54.6%		94.2%	77.9%	62.7%	57.7%
Canada	51.2%	56.6%	58.8%		61.5%	56.9%	56.7%	45.3%
Oceania	56.9%	57.6%	51.6%		67.4%	55.7%	50.2%	42.0%
Korea	56.7%	60.8%	70.5%		56.5%	67.3%	65.0%	68.9%
China	68.1%	67.2%	51.1%		61.4%	78.7%	68.6%	76.4%
Europe	45.5%	45.6%	44.7%				45.7%	50.7%

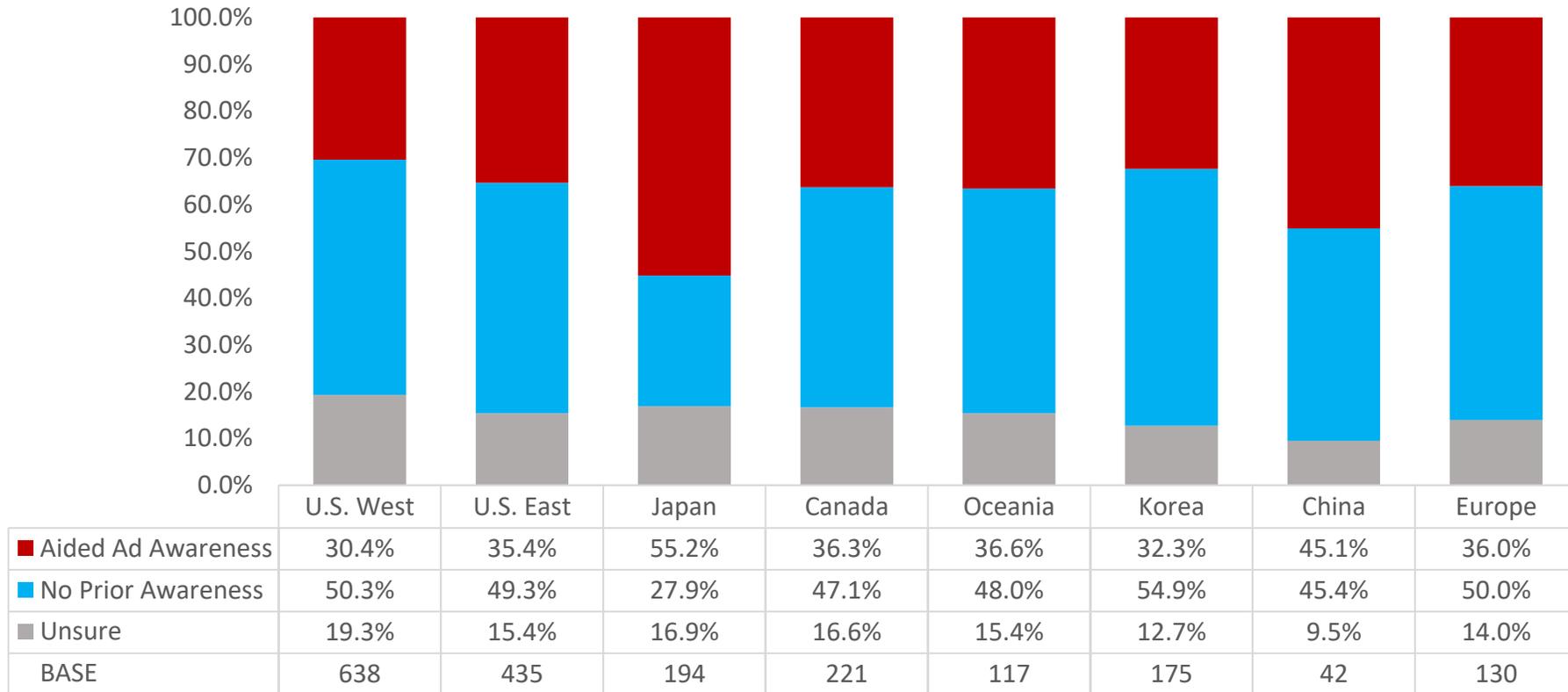
P= Preliminary Data

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.



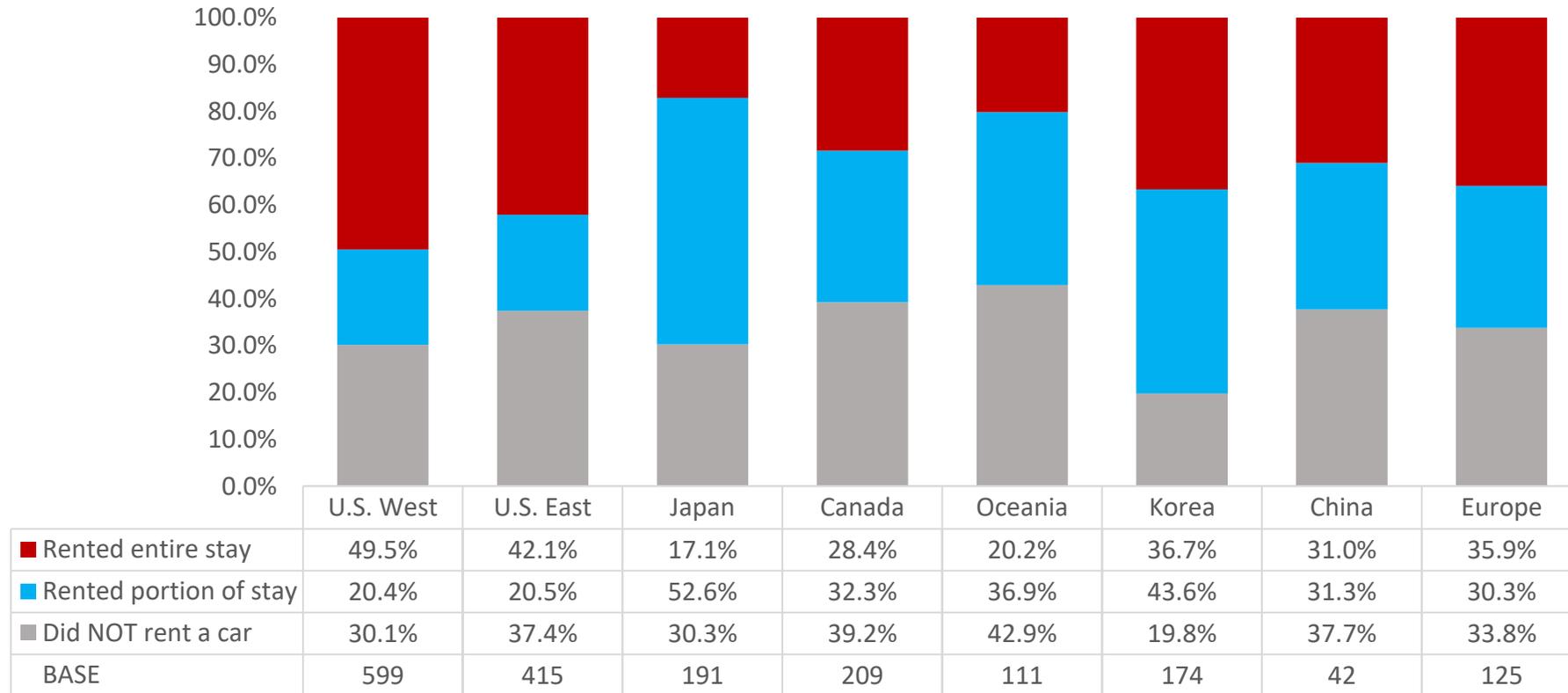
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	41.4%	49.6%	41.0%	58.2%	56.8%	71.5%	55.4%	52.3%
Hawaiian cultural experiences and Hawaiian cultural events	25.1%	27.6%	15.6%	35.1%	22.1%	23.8%	5.8%	24.0%
Social media posts and videos	17.3%	20.5%	40.1%	26.3%	26.1%	11.8%	23.7%	35.6%
Television programs or movies filmed in Hawai'i	10.3%	17.8%	46.0%	20.5%	25.6%	28.0%	15.6%	36.3%
Outdoor or sporting activities and events	12.6%	12.0%	13.3%	15.6%	15.4%	19.2%	16.1%	13.2%
Hawaiian music	14.1%	12.7%	20.5%	17.7%	12.9%	10.0%	3.4%	13.1%
Attend a festival or other event	7.5%	6.1%	5.0%	6.0%	1.4%	4.6%	3.5%	4.5%
BASE	637	433	194	220	117	42	175	130

CAR RENTAL - O'AHU

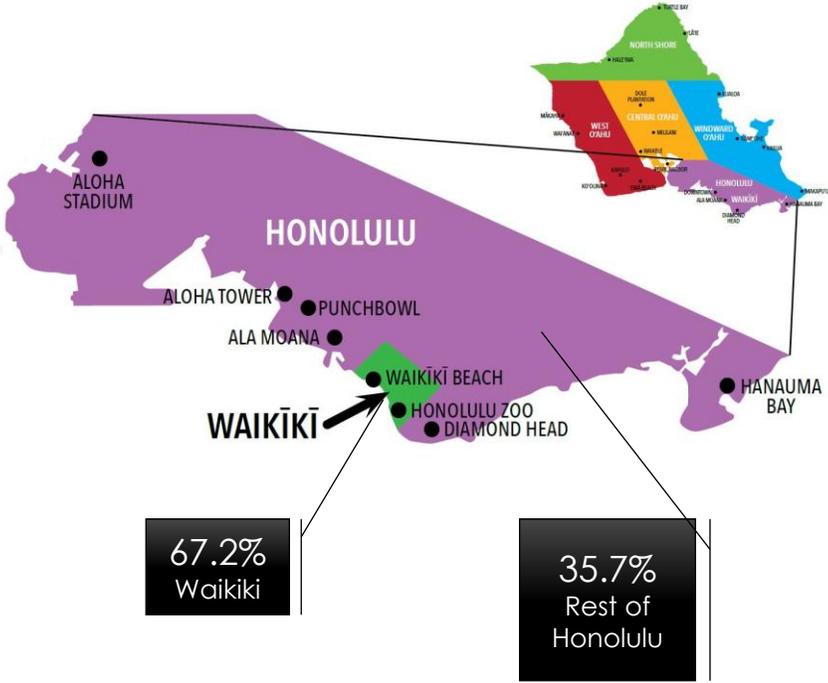
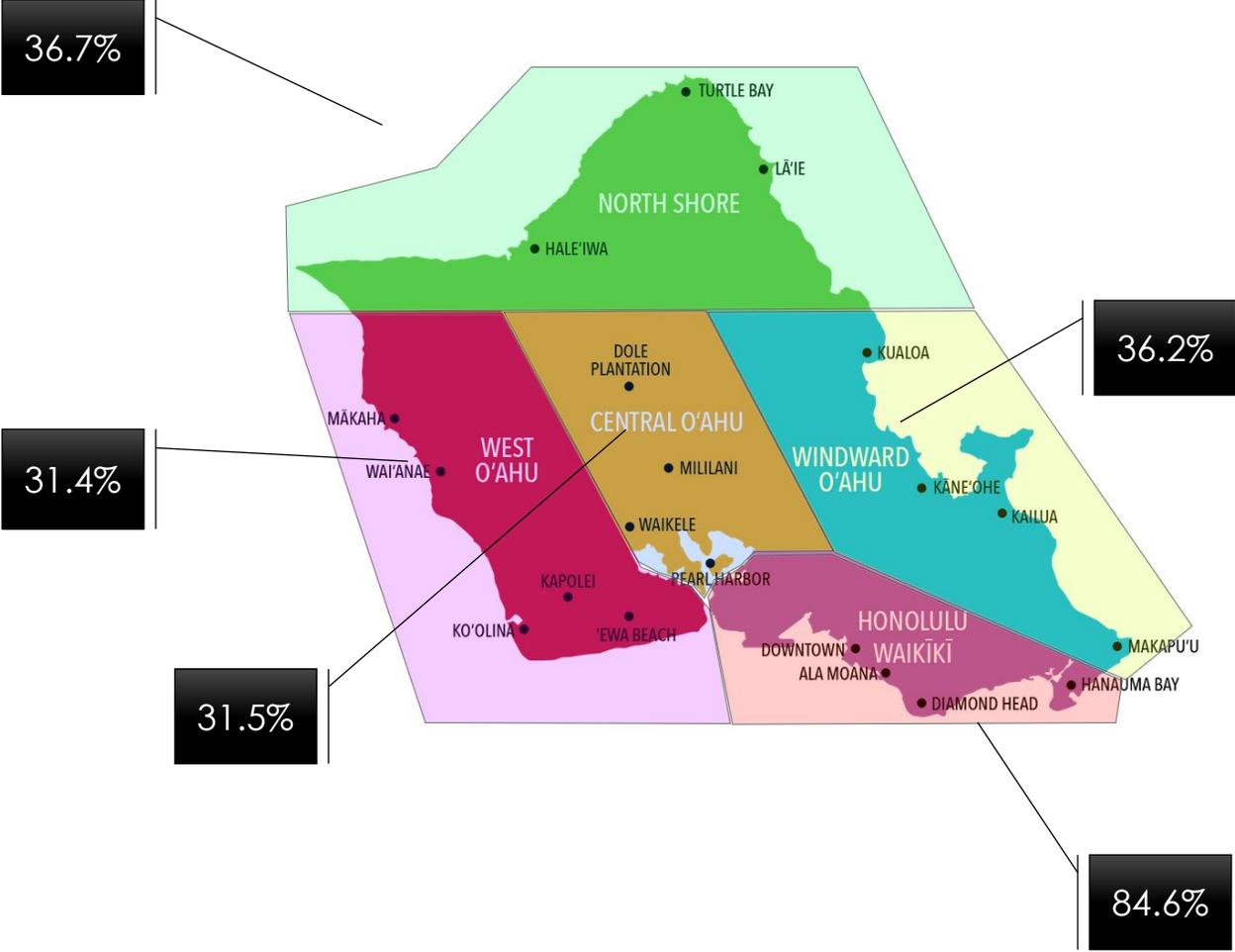


REASONS FOR PARTIAL RENTAL CAR - O‘AHU

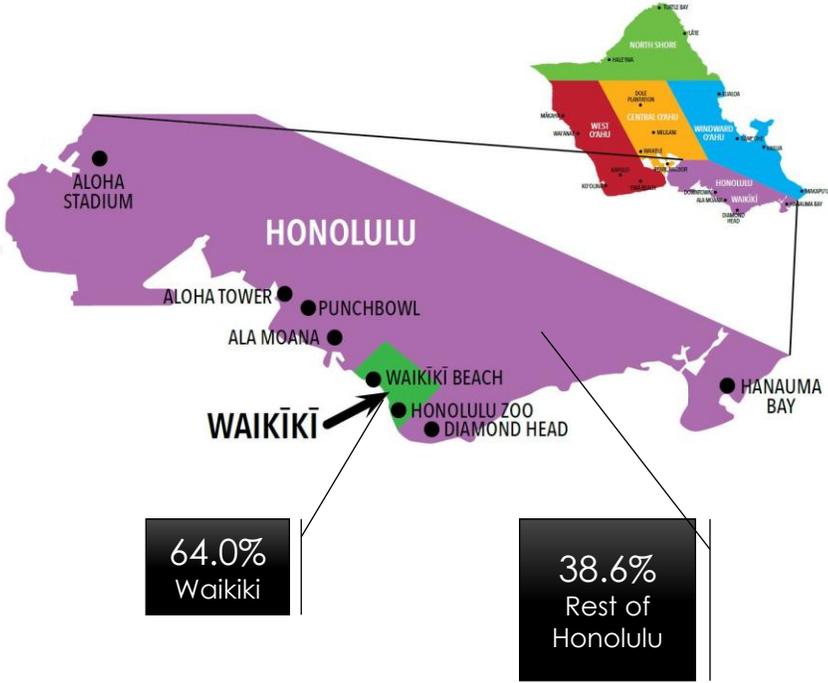
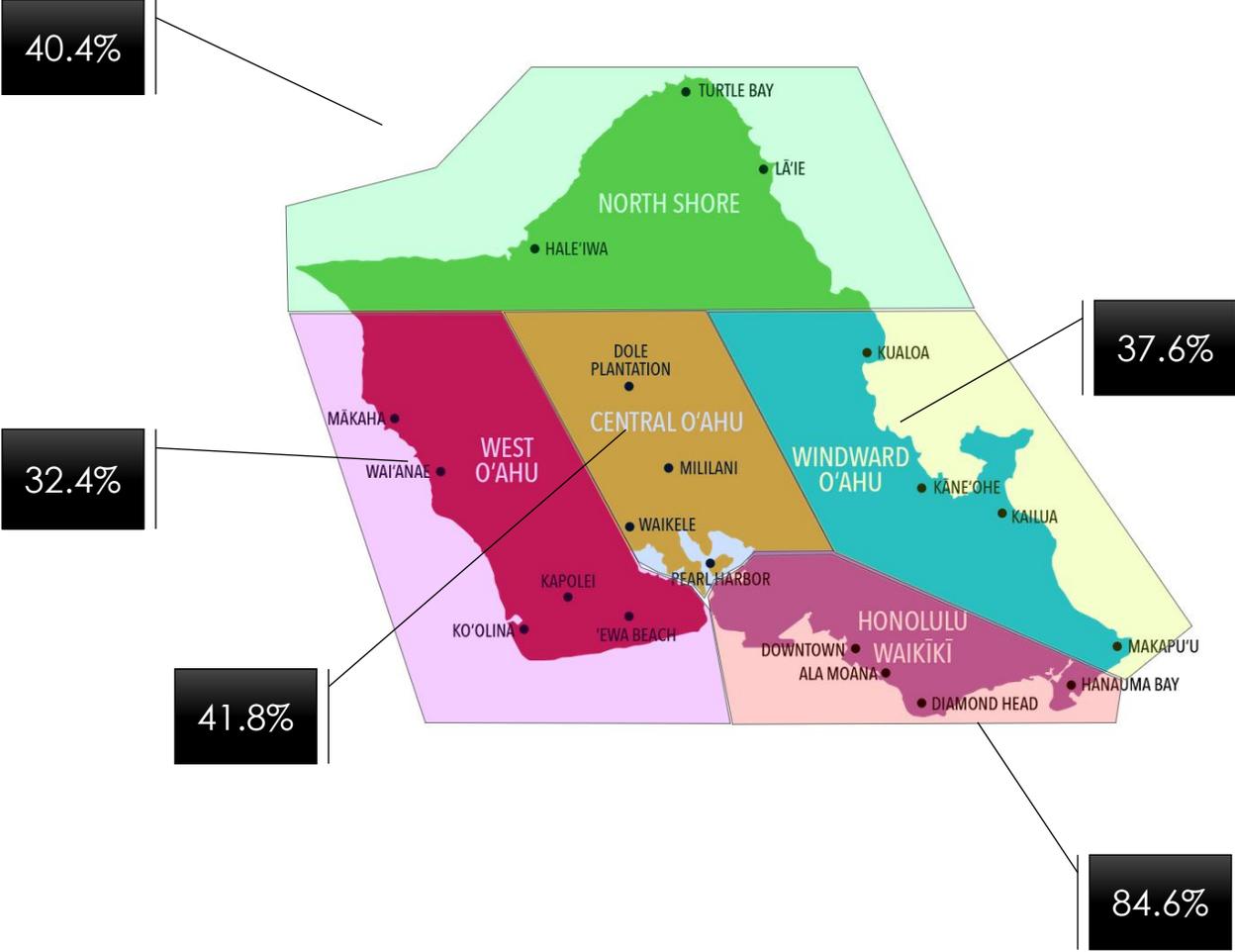
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	75.9%	73.6%	85.6%	71.9%	84.6%	62.3%	53.7%	86.7%
Parking was too expensive at my hotel/ lodging	37.6%	37.0%	6.6%	44.7%	25.1%	30.3%	34.6%	31.5%
Car rental rates were too expensive	17.7%	17.9%	14.4%	26.6%	18.6%	30.3%	39.7%	13.2%
Wanted to reduce my carbon footprint	10.3%	13.2%	1.9%	9.0%	0.0%	15.6%	4.0%	13.5%
BASE	119	84	105	67	41	13	76	38



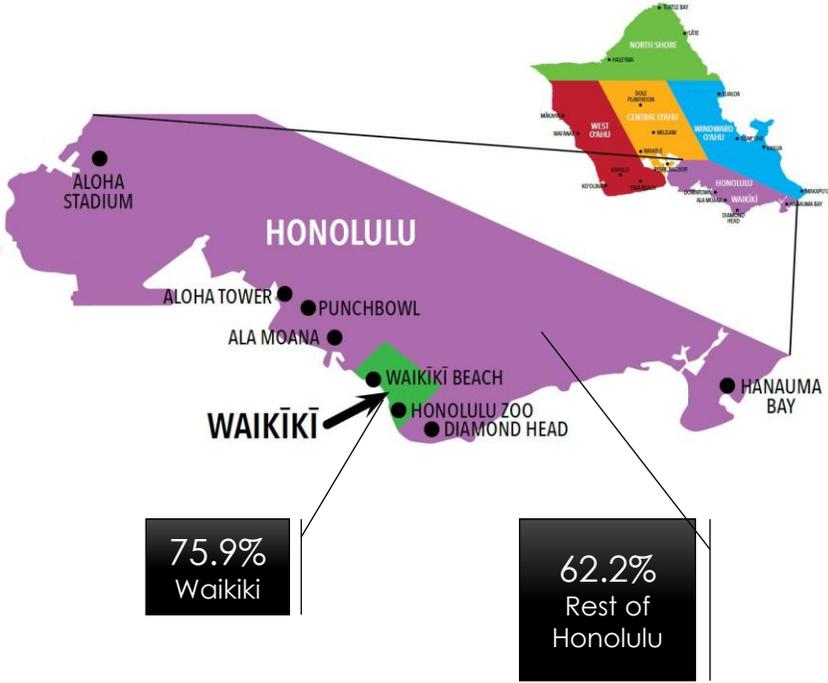
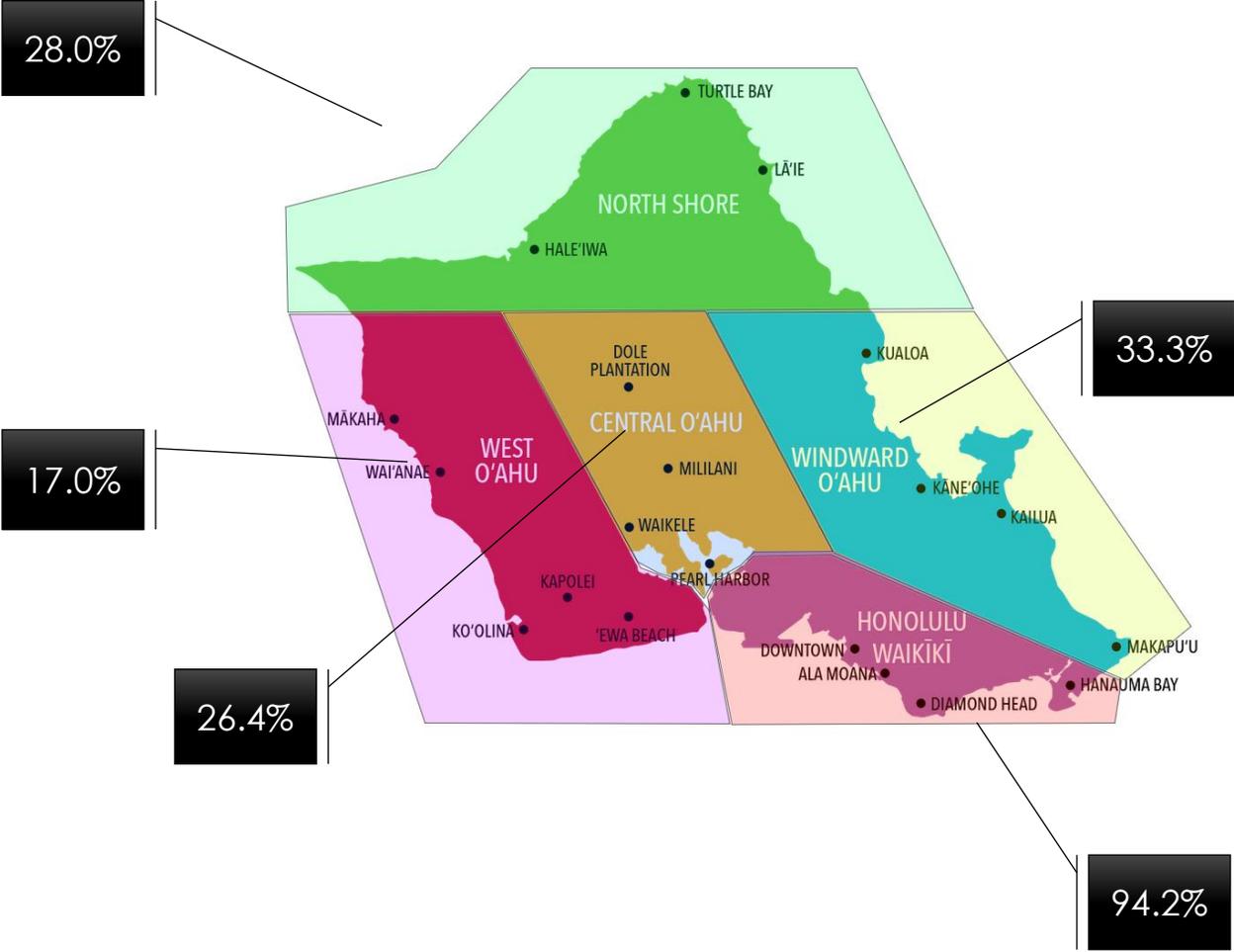
AREAS VISITED O'AHU U.S. WEST



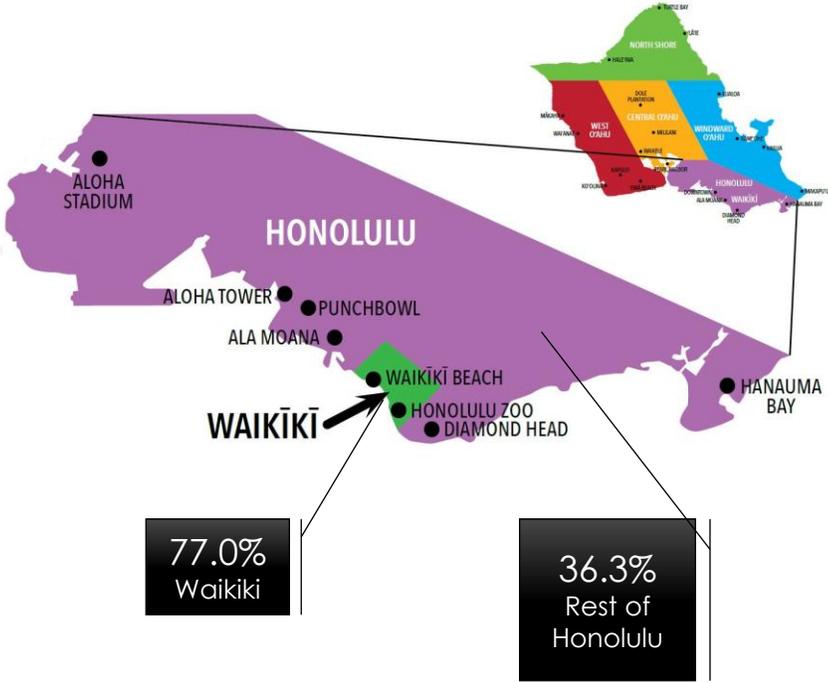
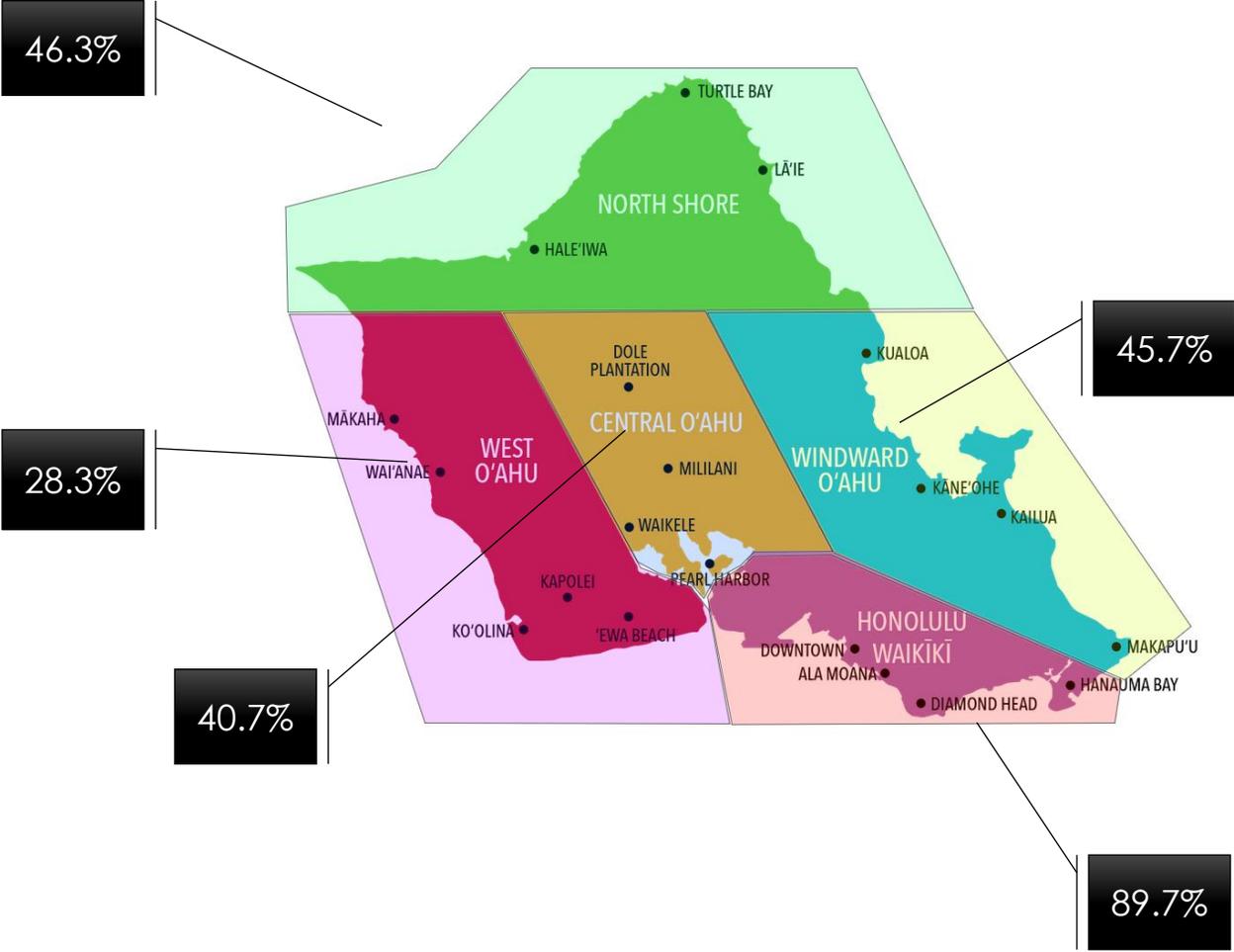
AREAS VISITED O'AHU U.S. EAST



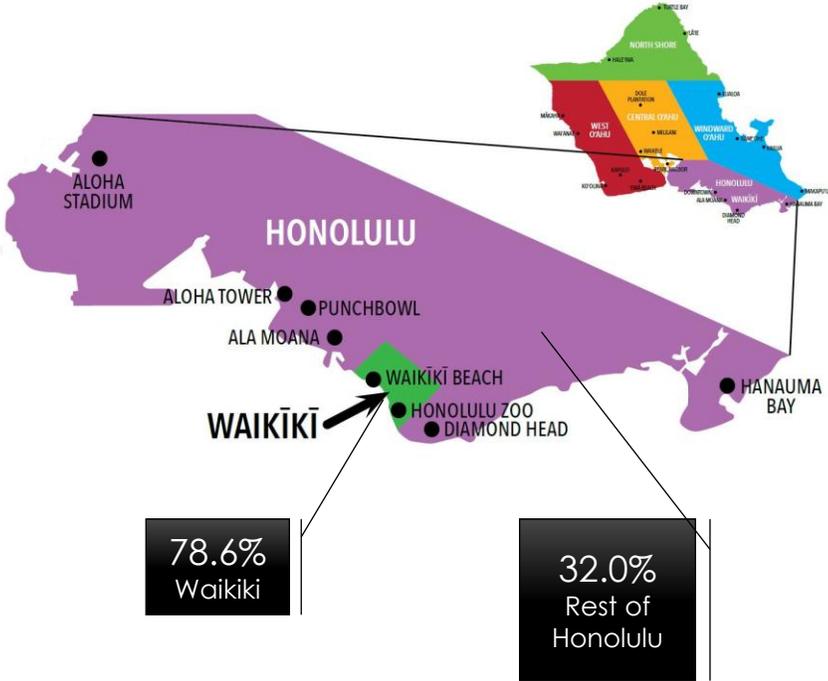
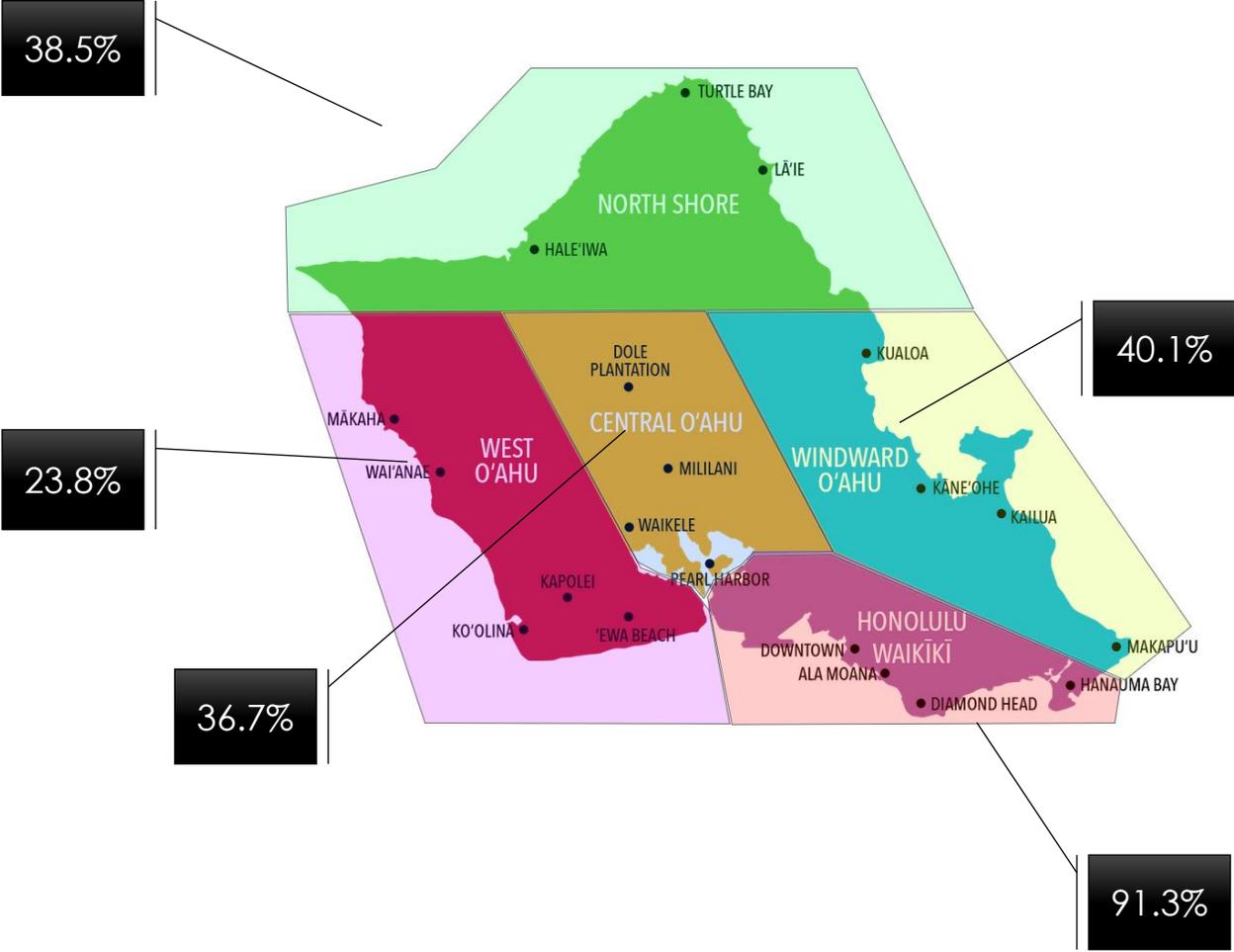
AREAS VISITED O'AHU JAPAN



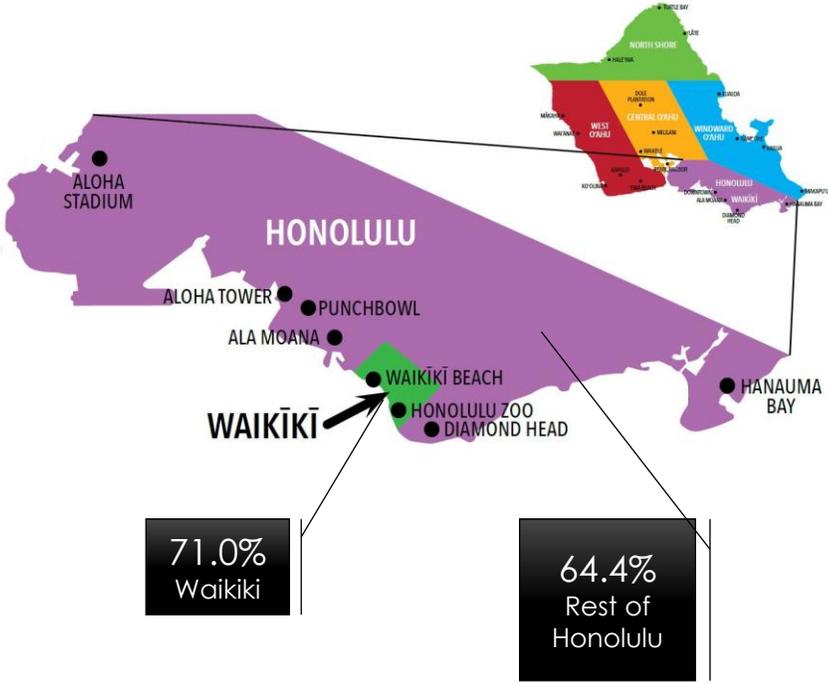
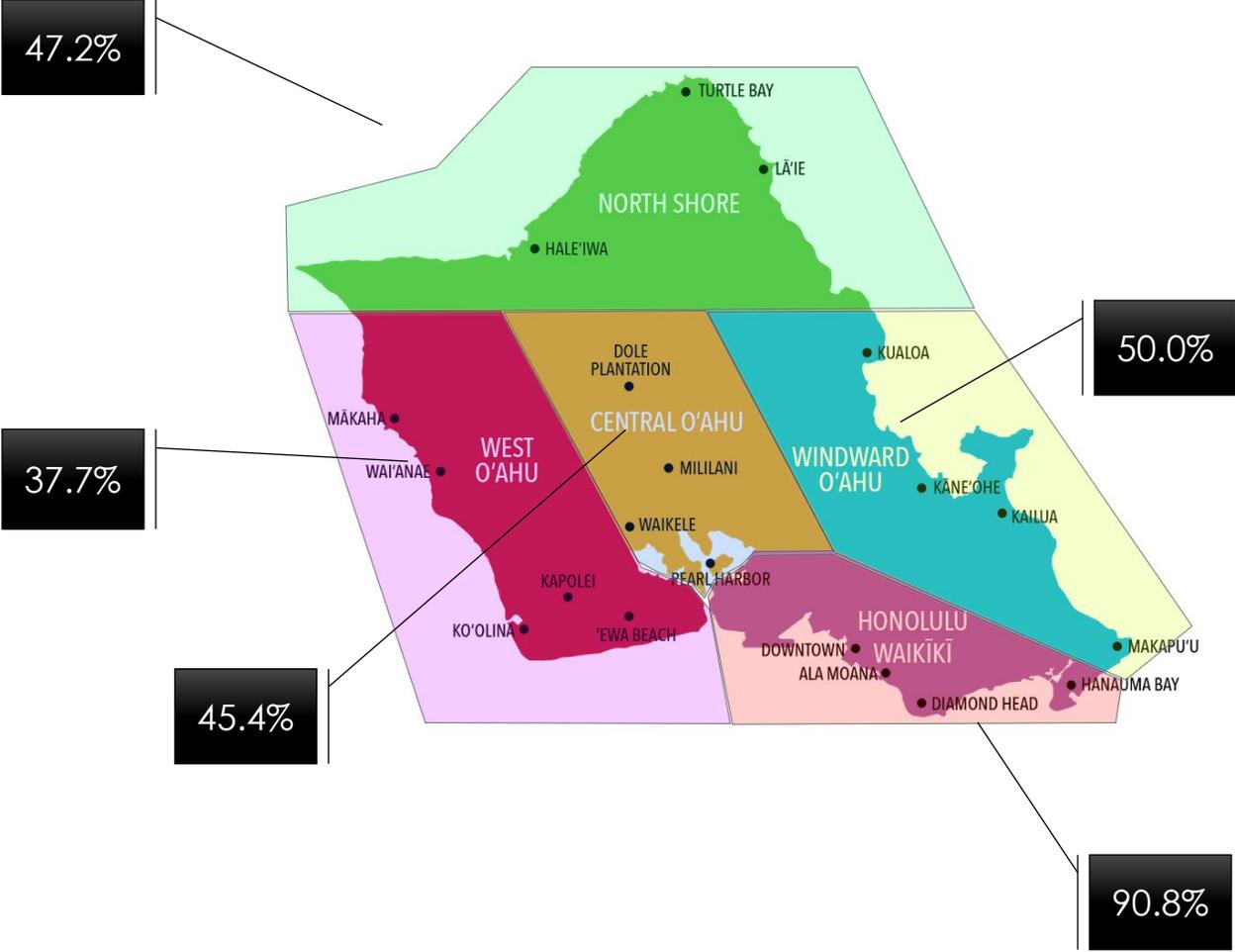
AREAS VISITED O'AHU CANADA



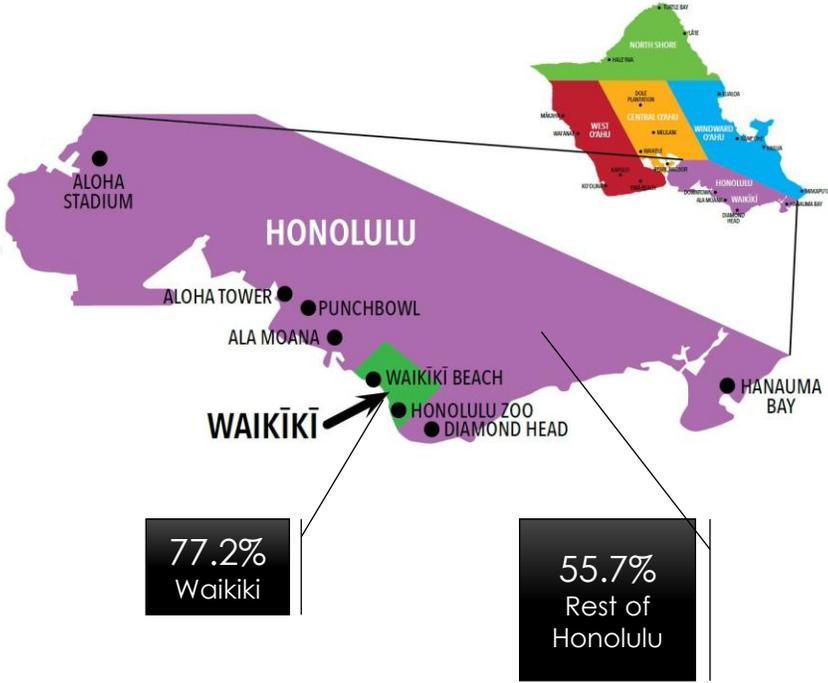
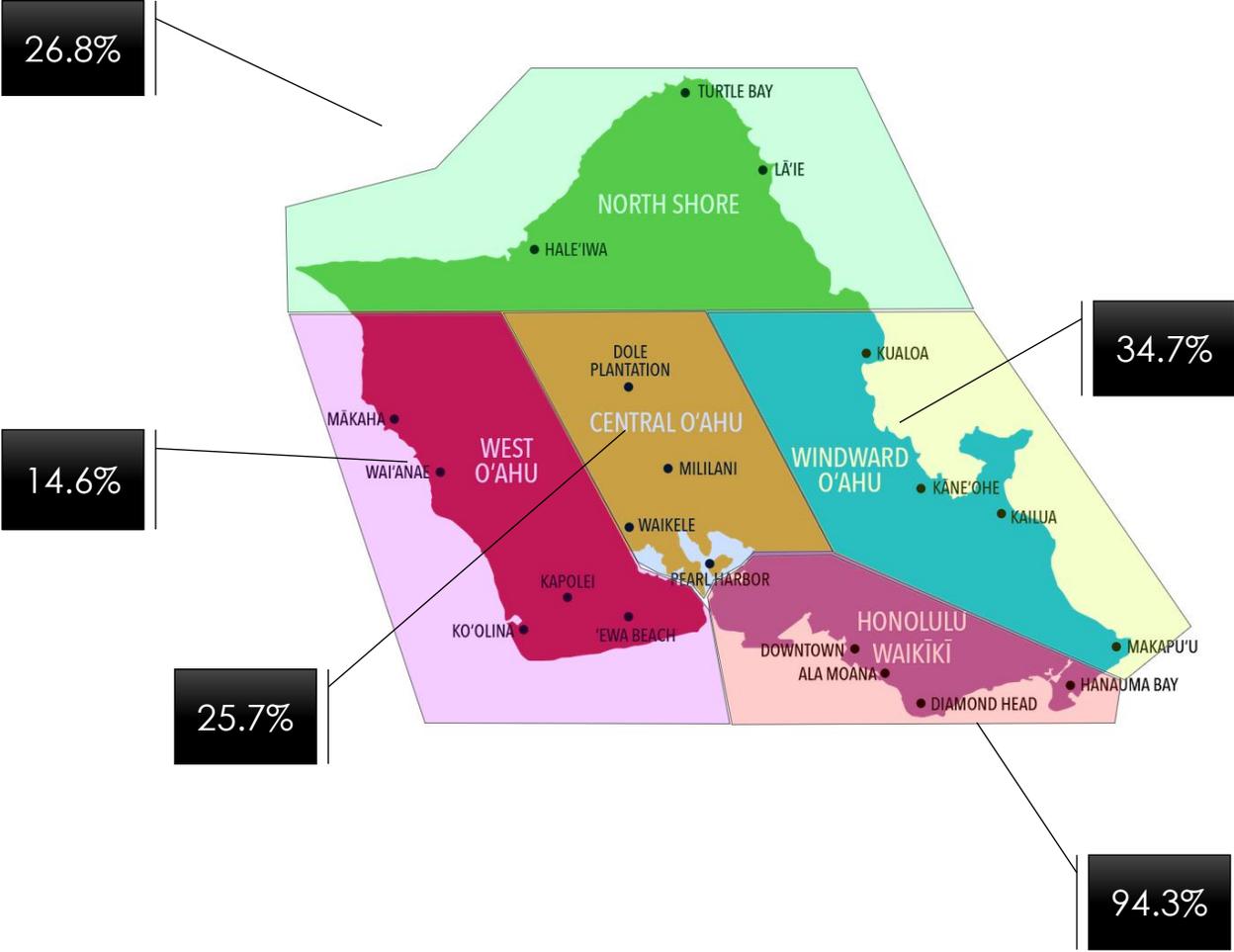
AREAS VISITED O'AHU OCEANIA



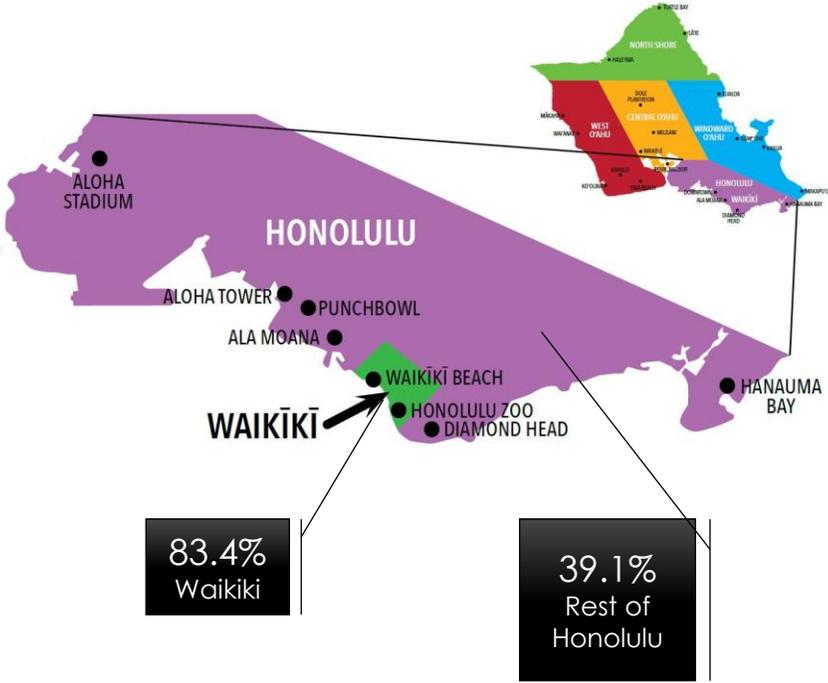
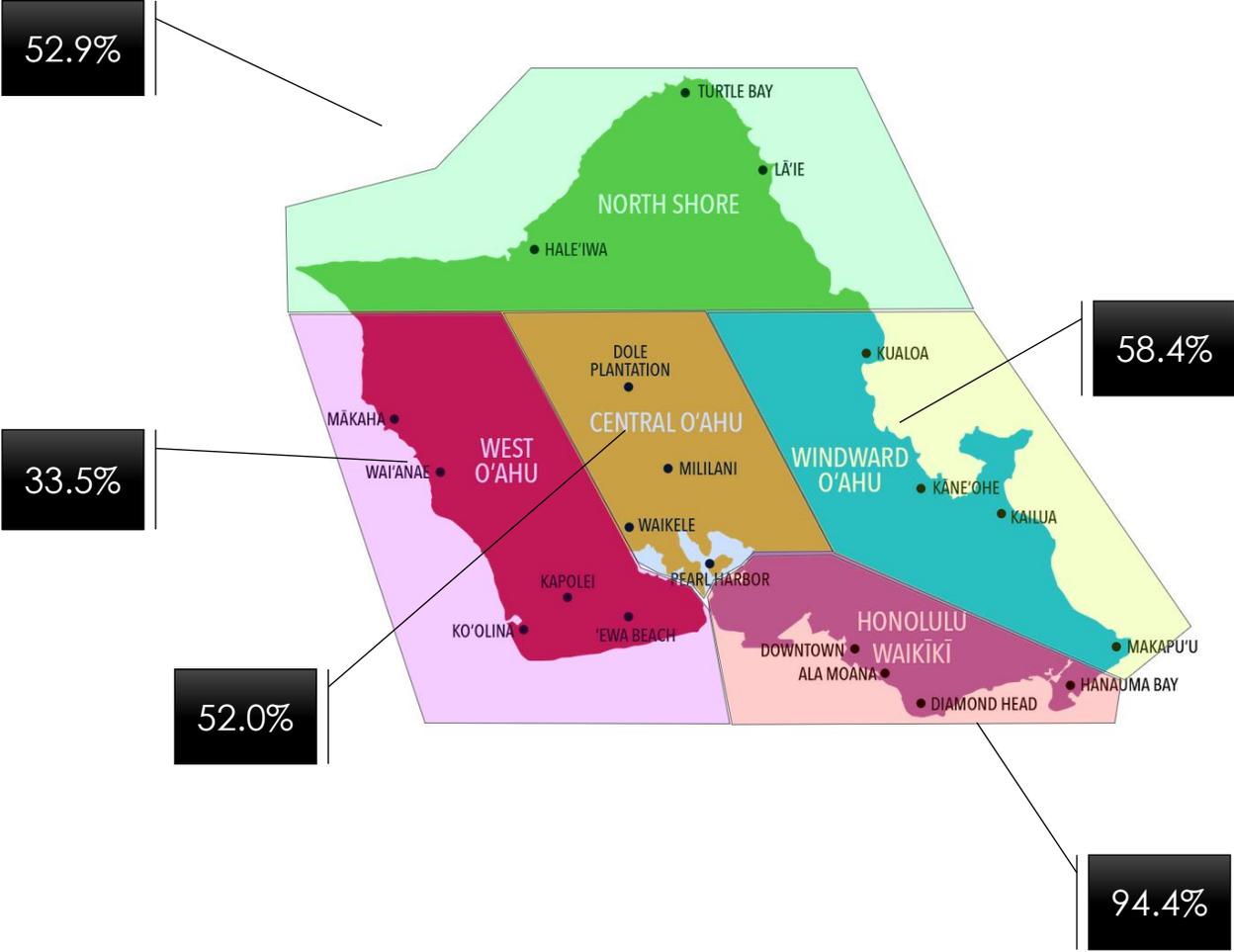
AREAS VISITED O'AHU CHINA



AREAS VISITED O'AHU KOREA



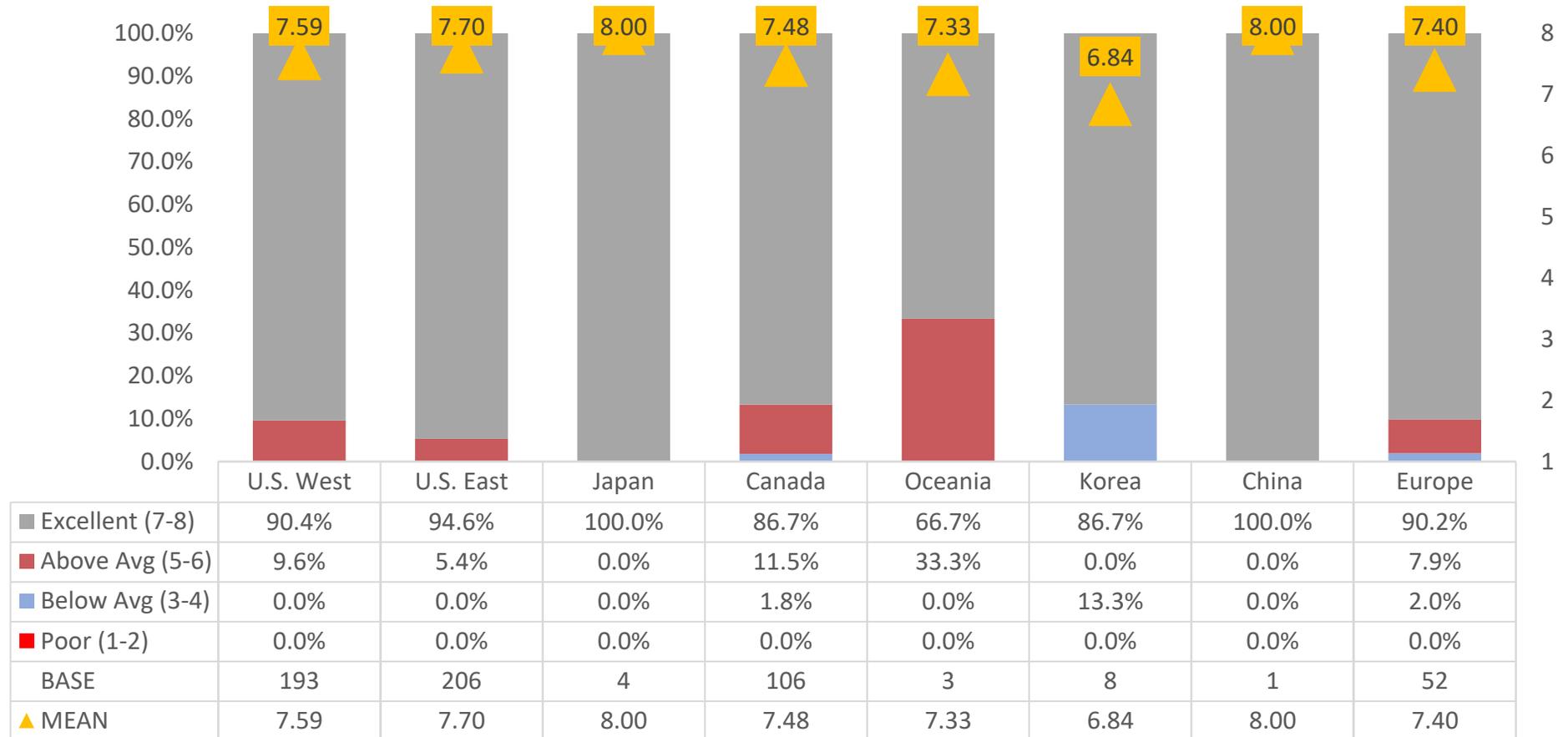
AREAS VISITED O'AHU EUROPE



Section 8 – Kaua‘i

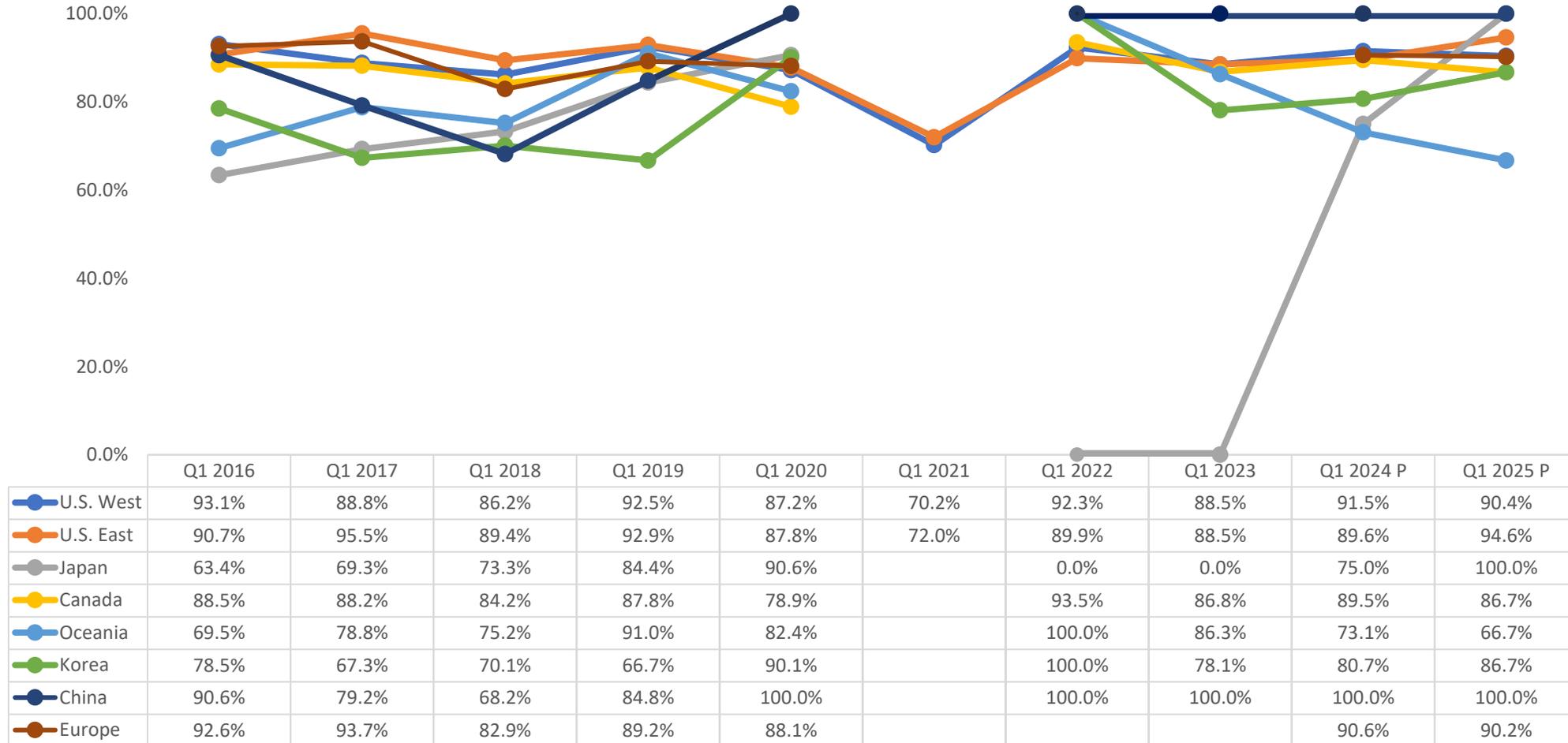
SATISFACTION - KAUA'I

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



SATISFACTION - KAUA'I

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



P= Preliminary Data

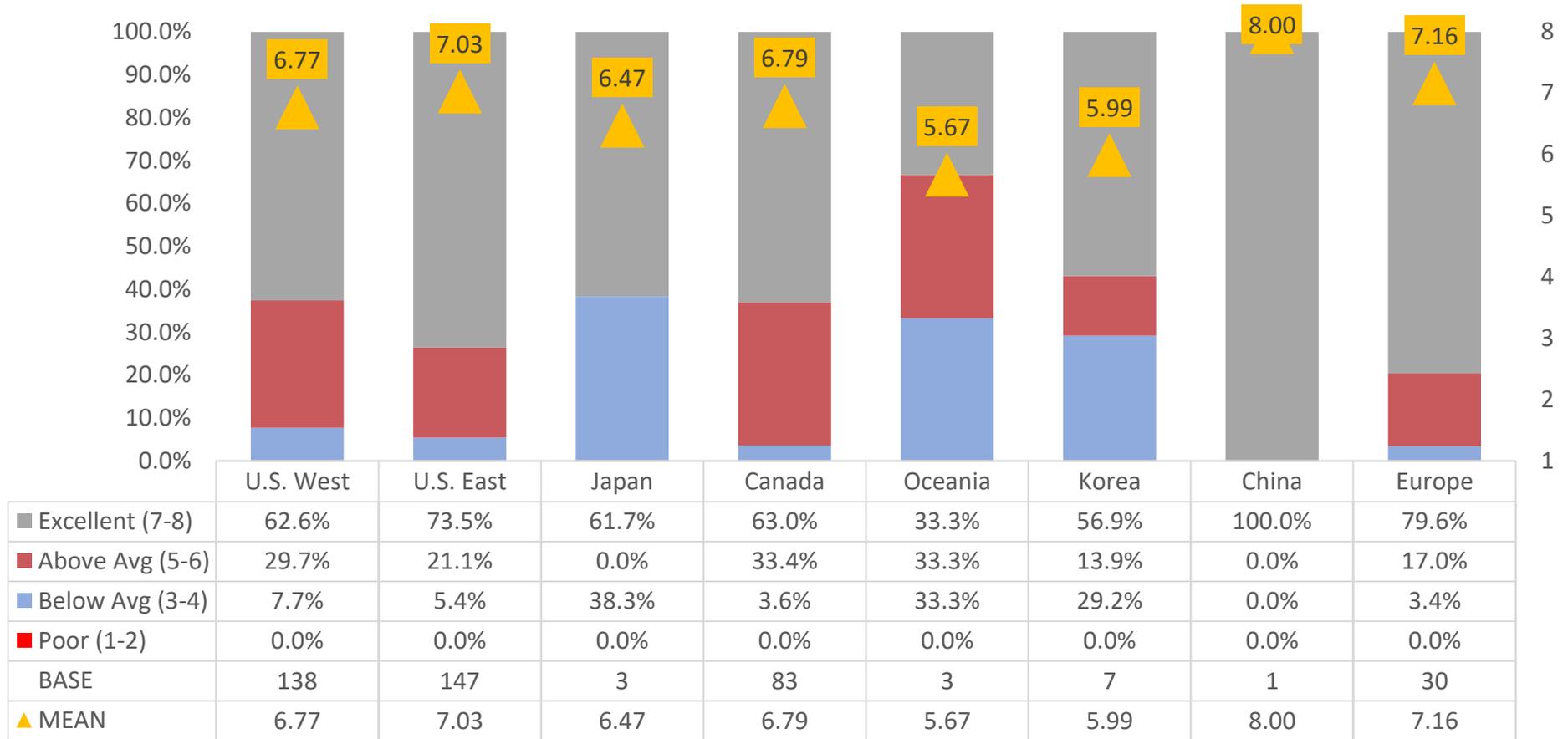
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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



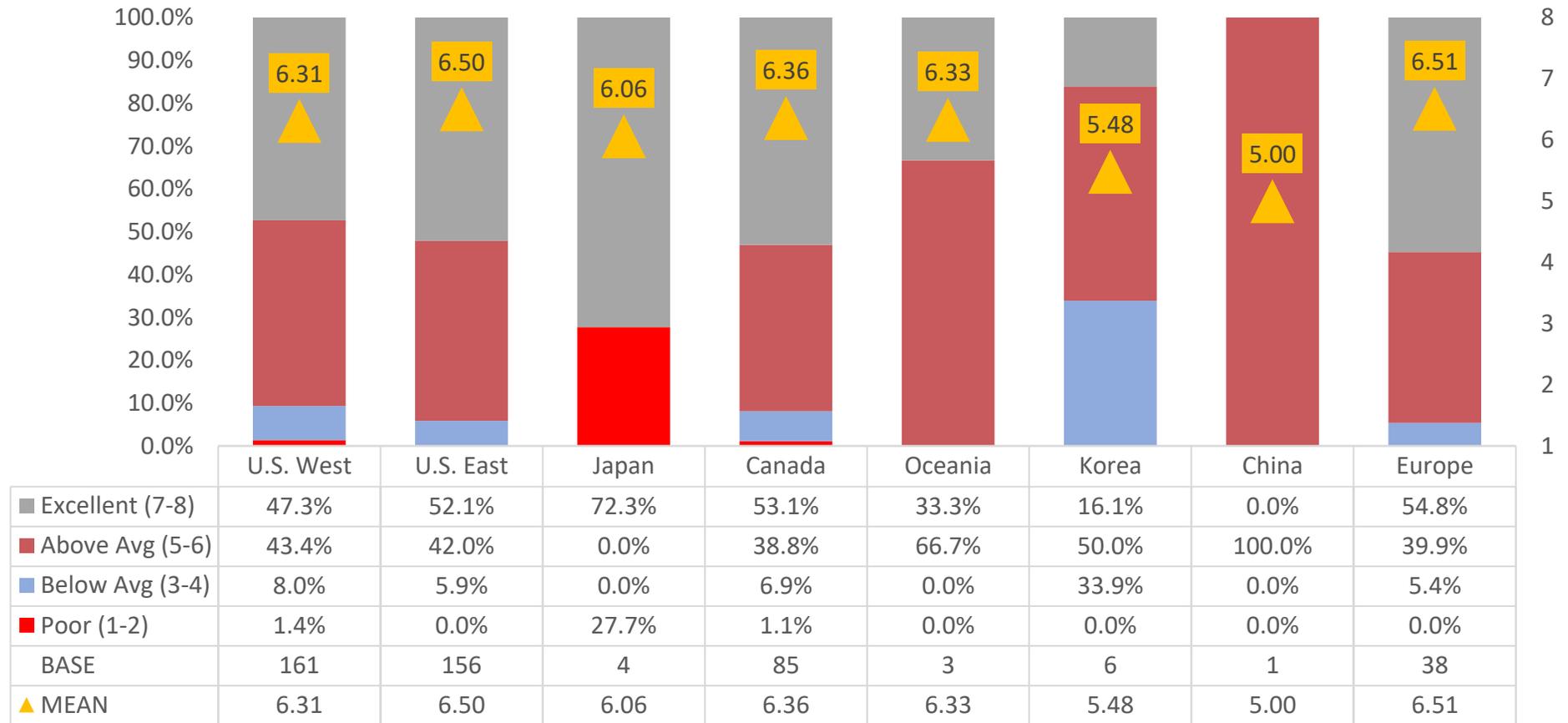
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



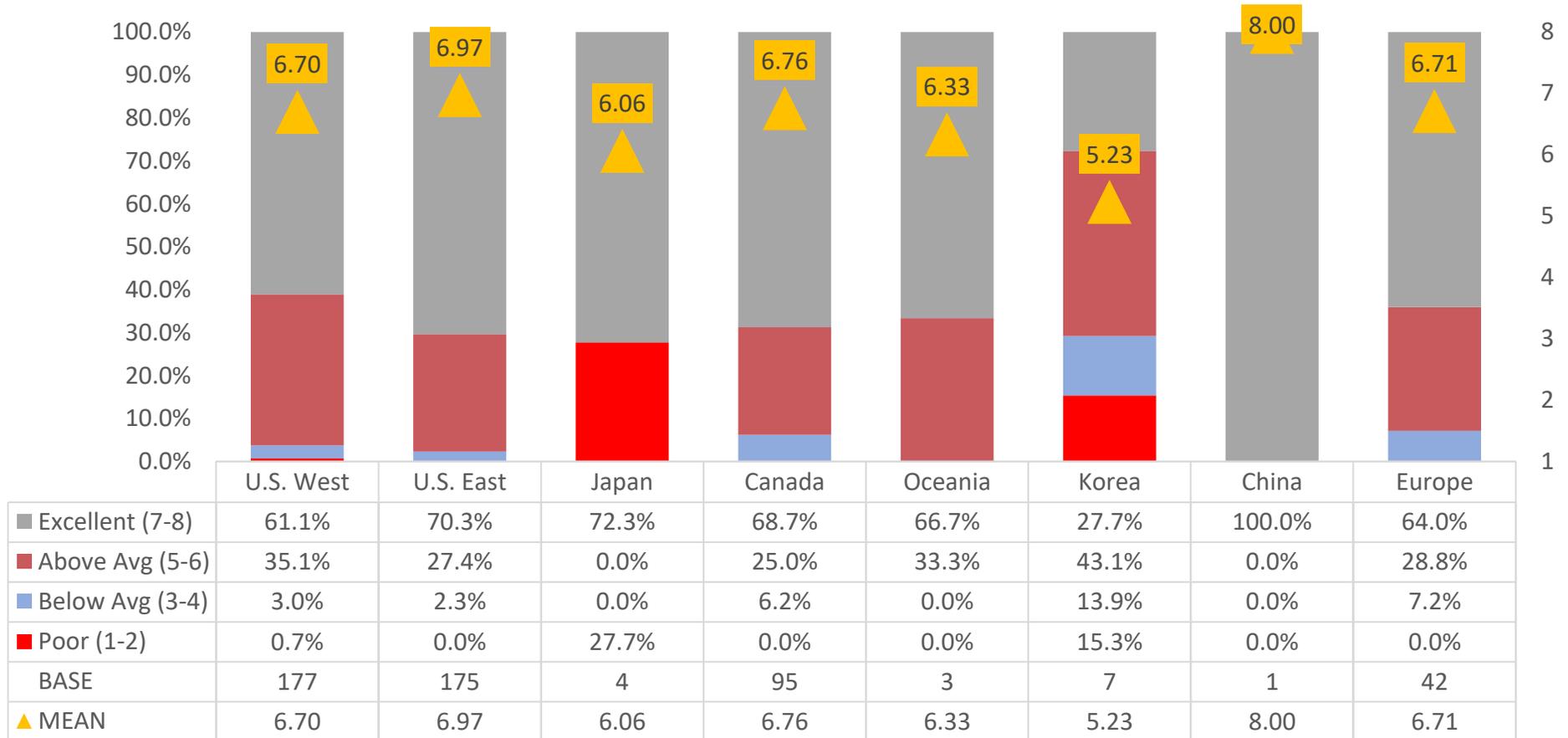
SHOPPING - KAUA'I

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



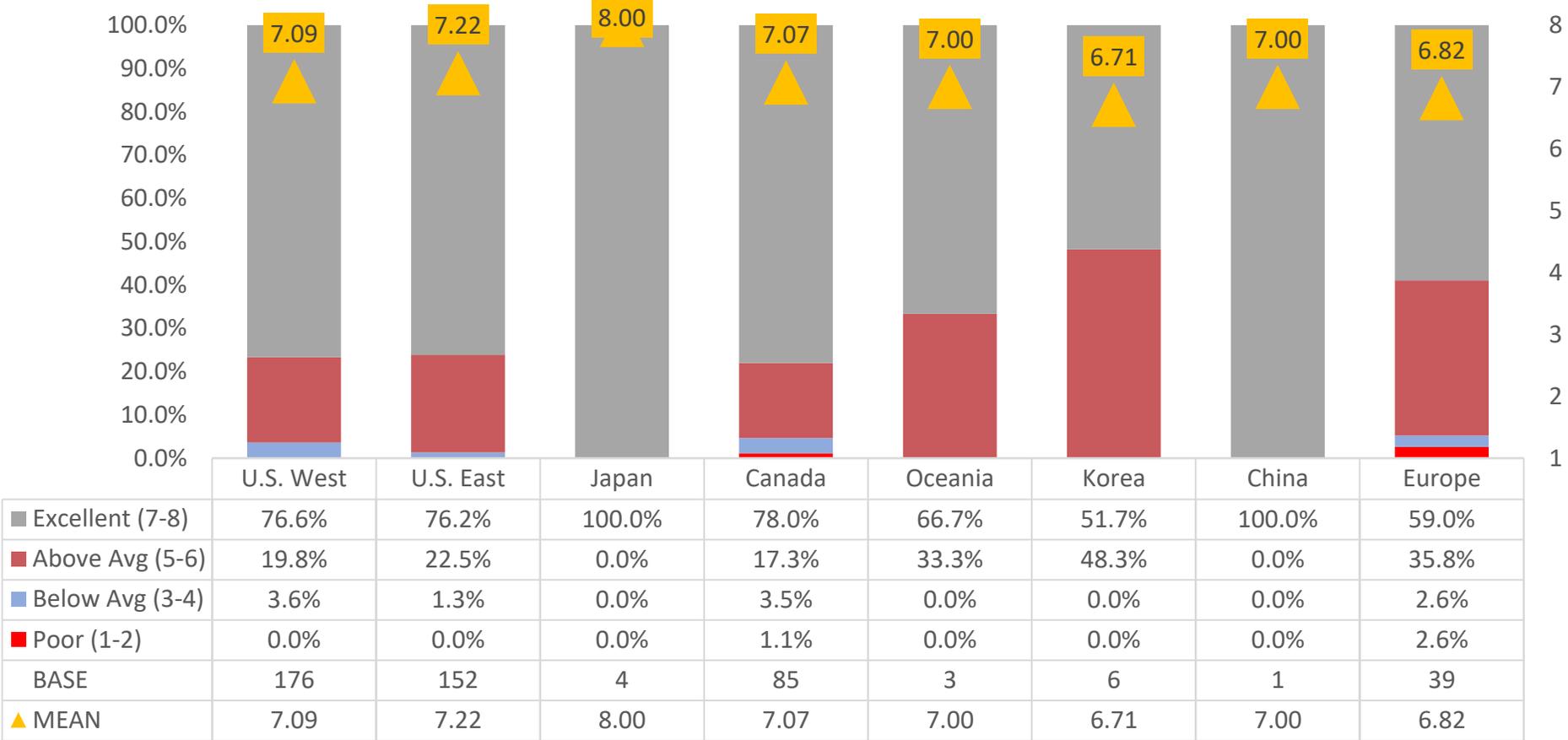
DINING/ FOOD & BEVERAGE - KAUA'I

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



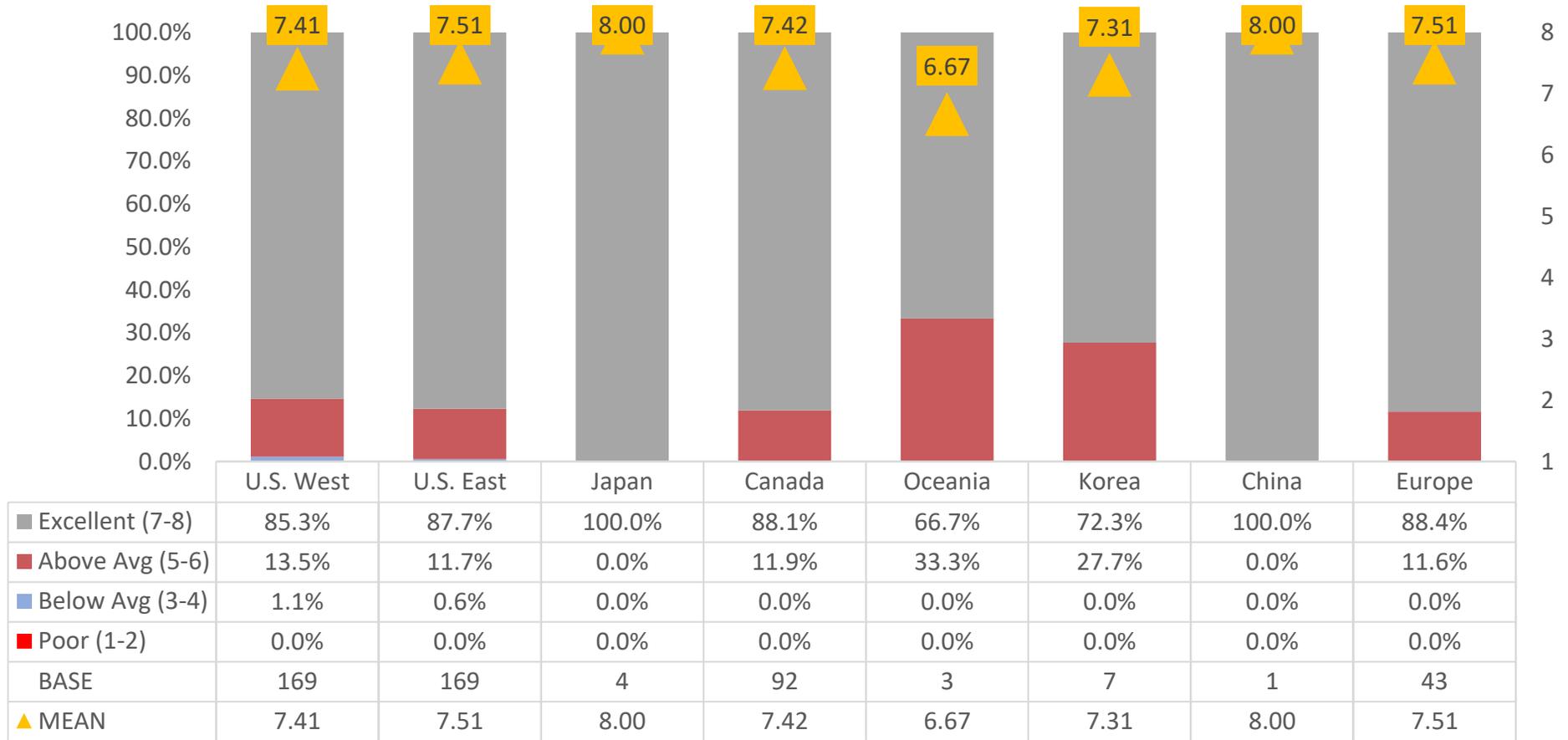
LODGING/ ACCOMMODATIONS - KAUA'I

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



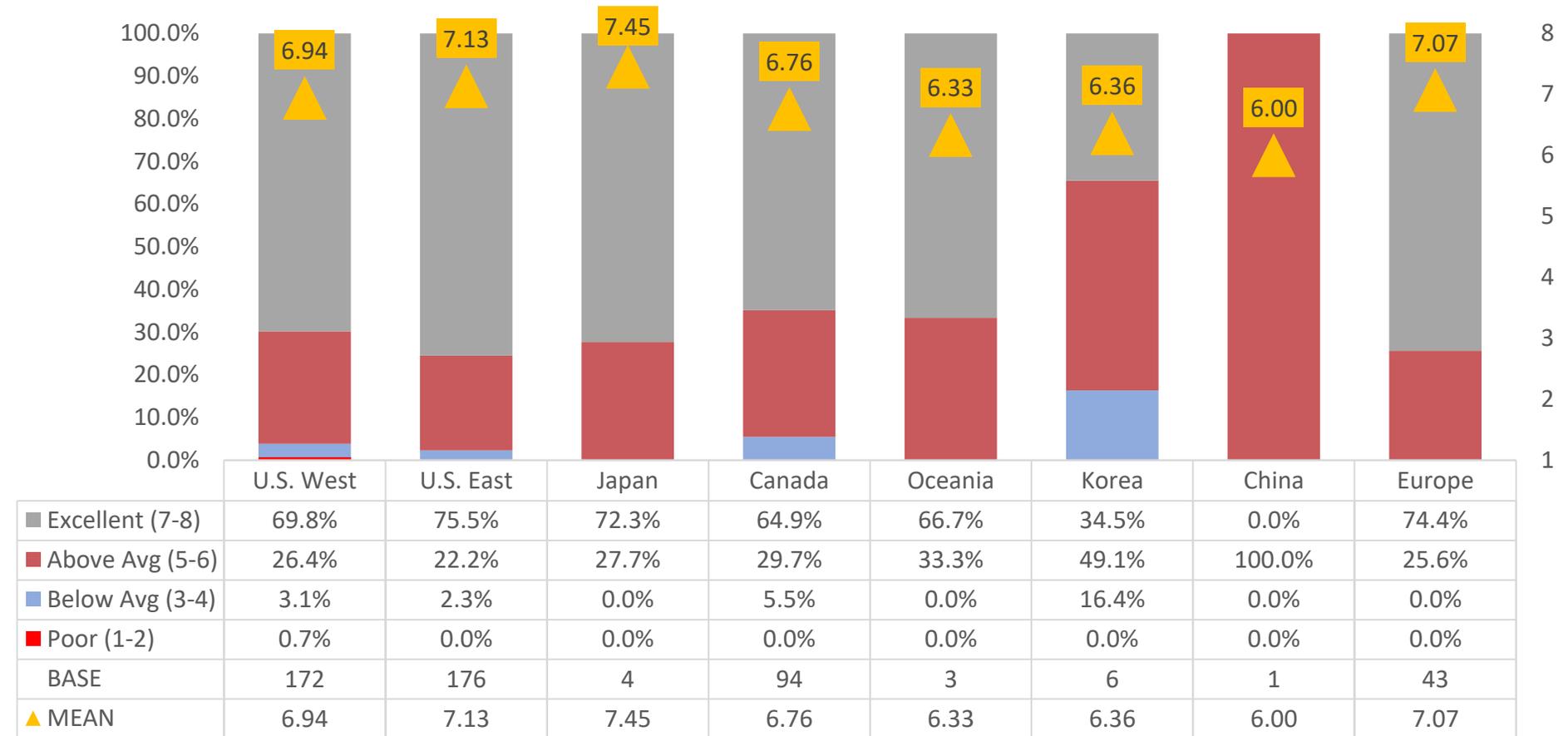
BEACHES - KAUA'I

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



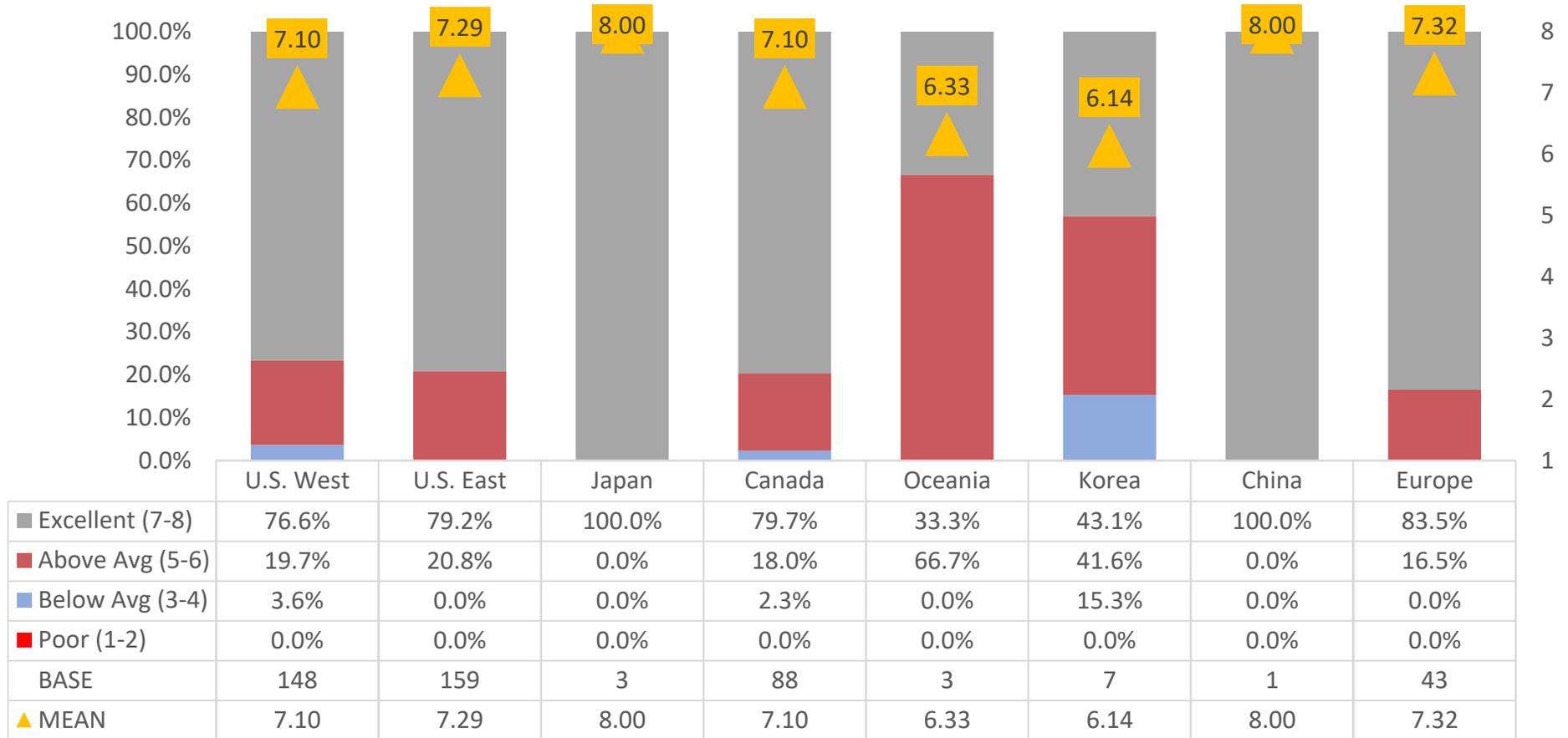
PUBLIC AREAS - KAUA'I

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



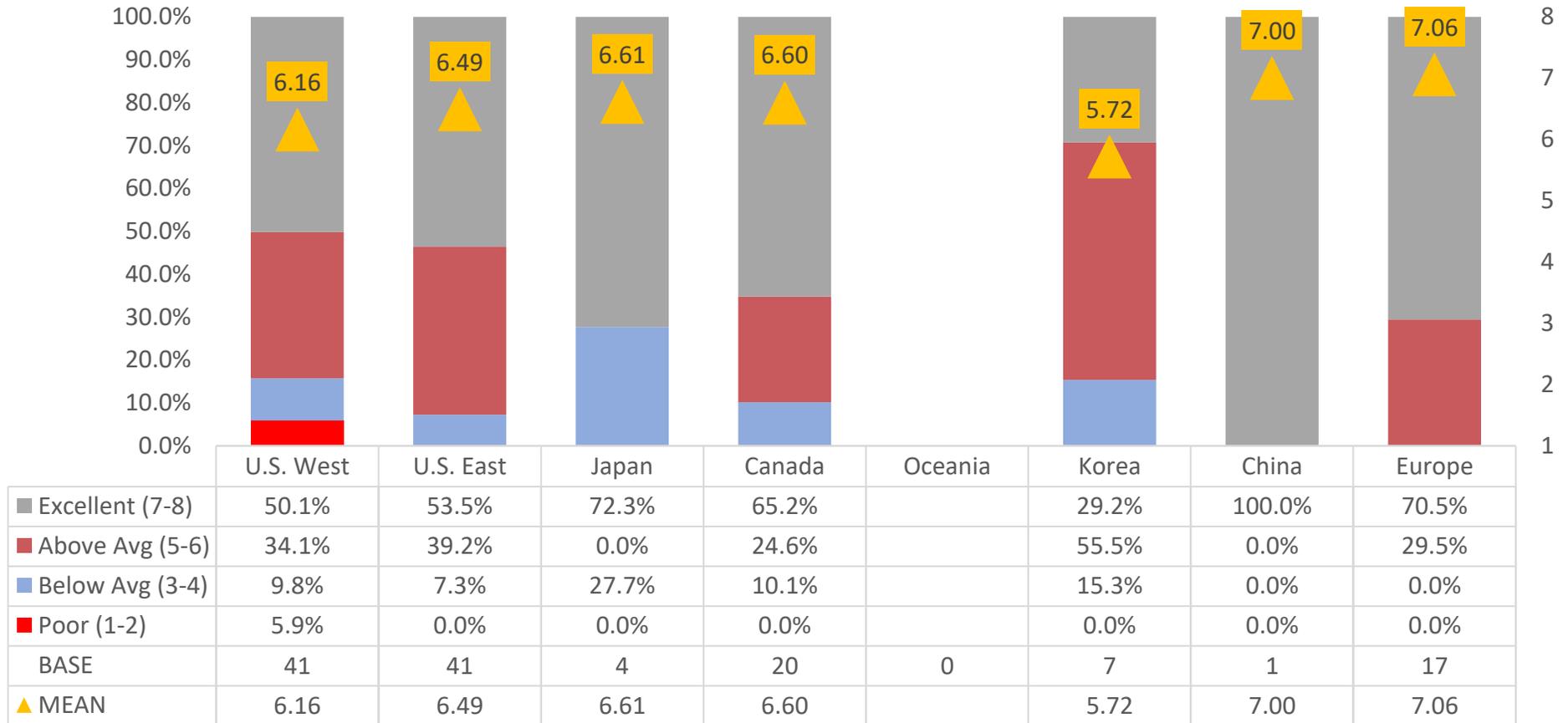
PARKS - KAUA'I

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



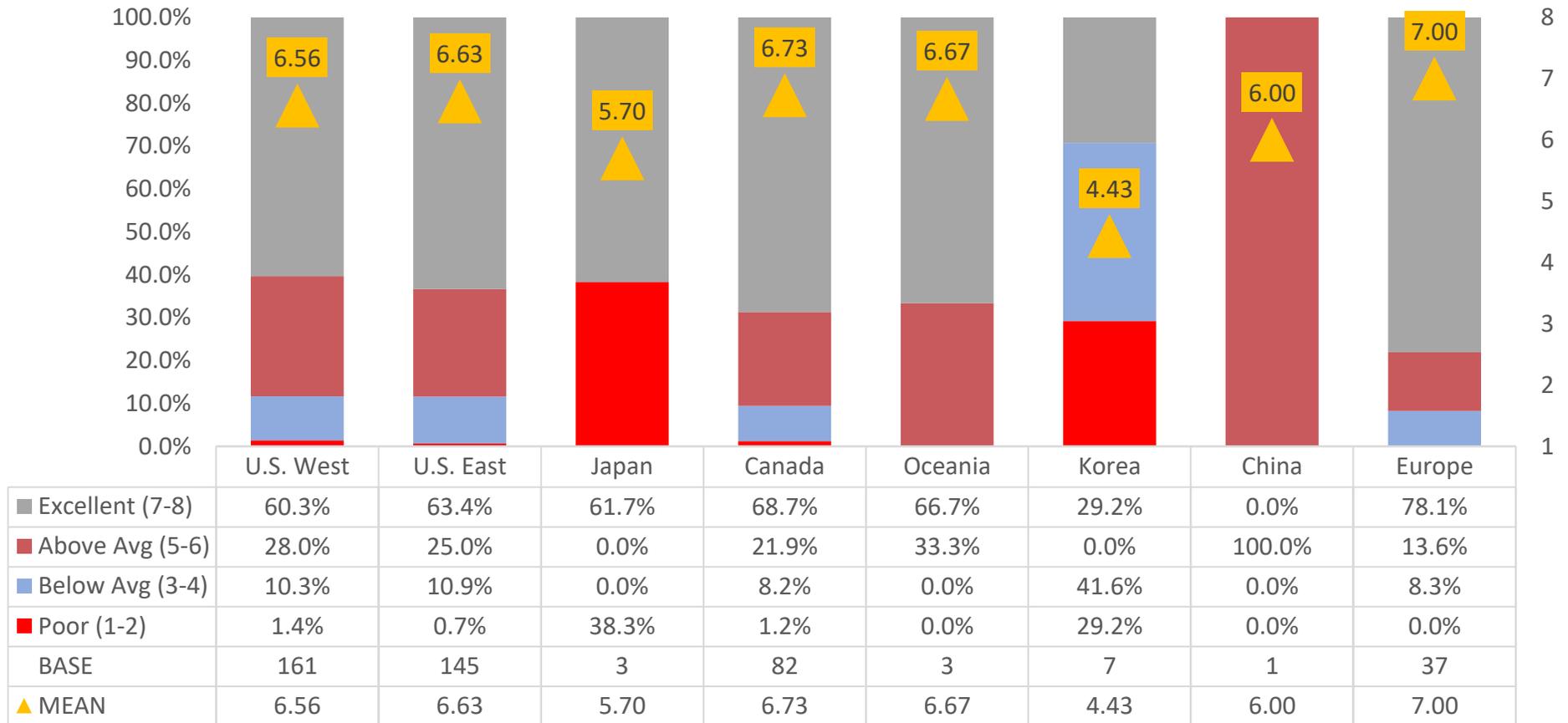
ROADS - KAUA'I

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



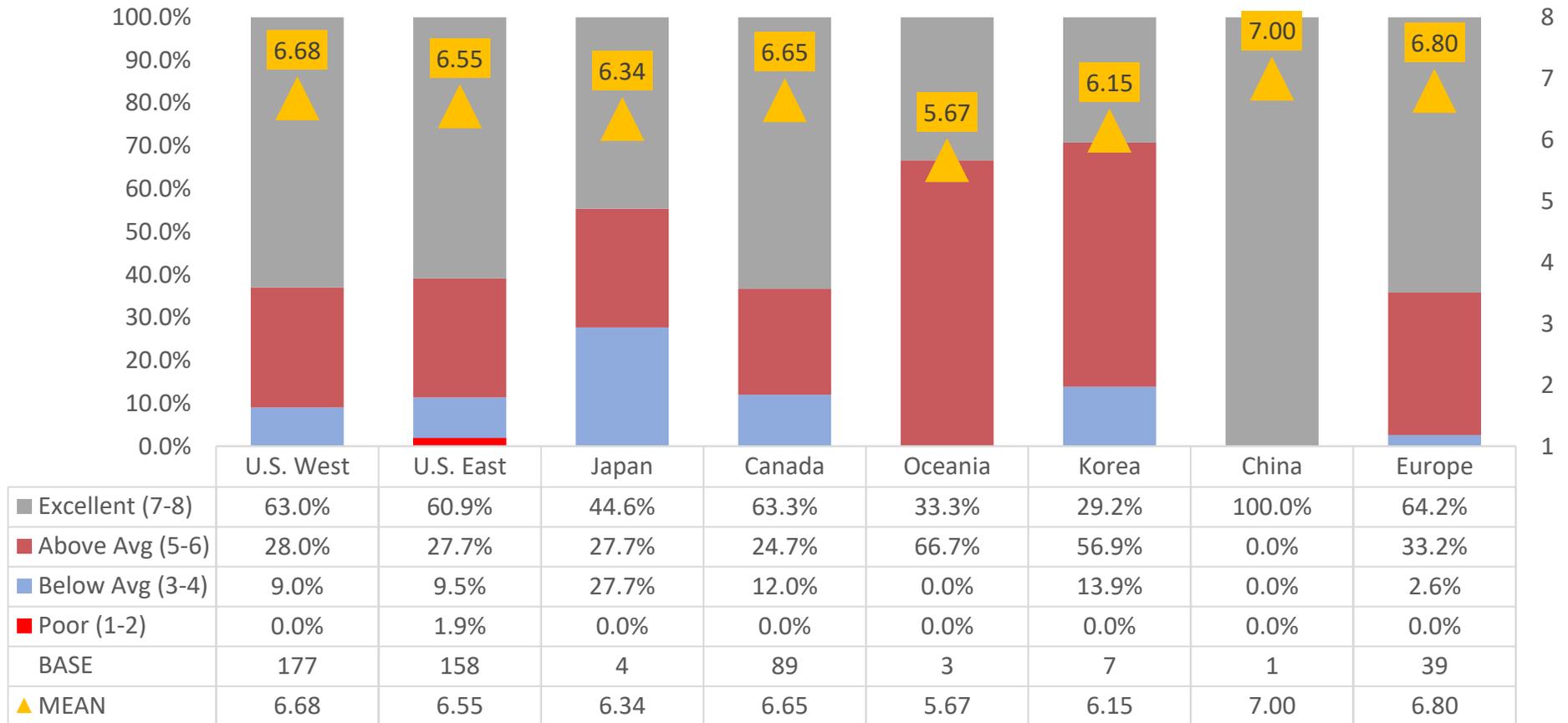
TRANSPORTATION ON ISLAND - KAUA'I

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



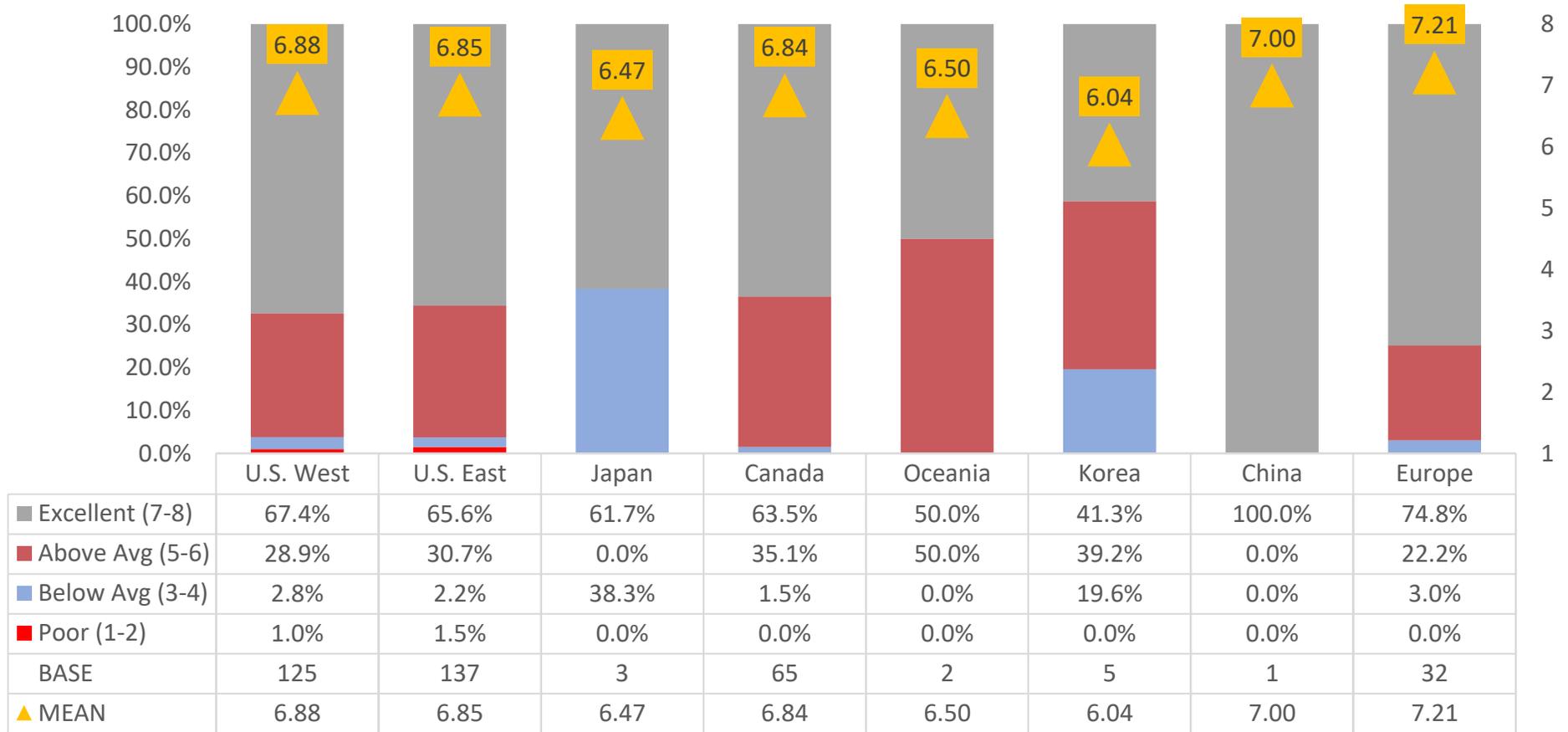
AIRPORT- KAUA'I

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



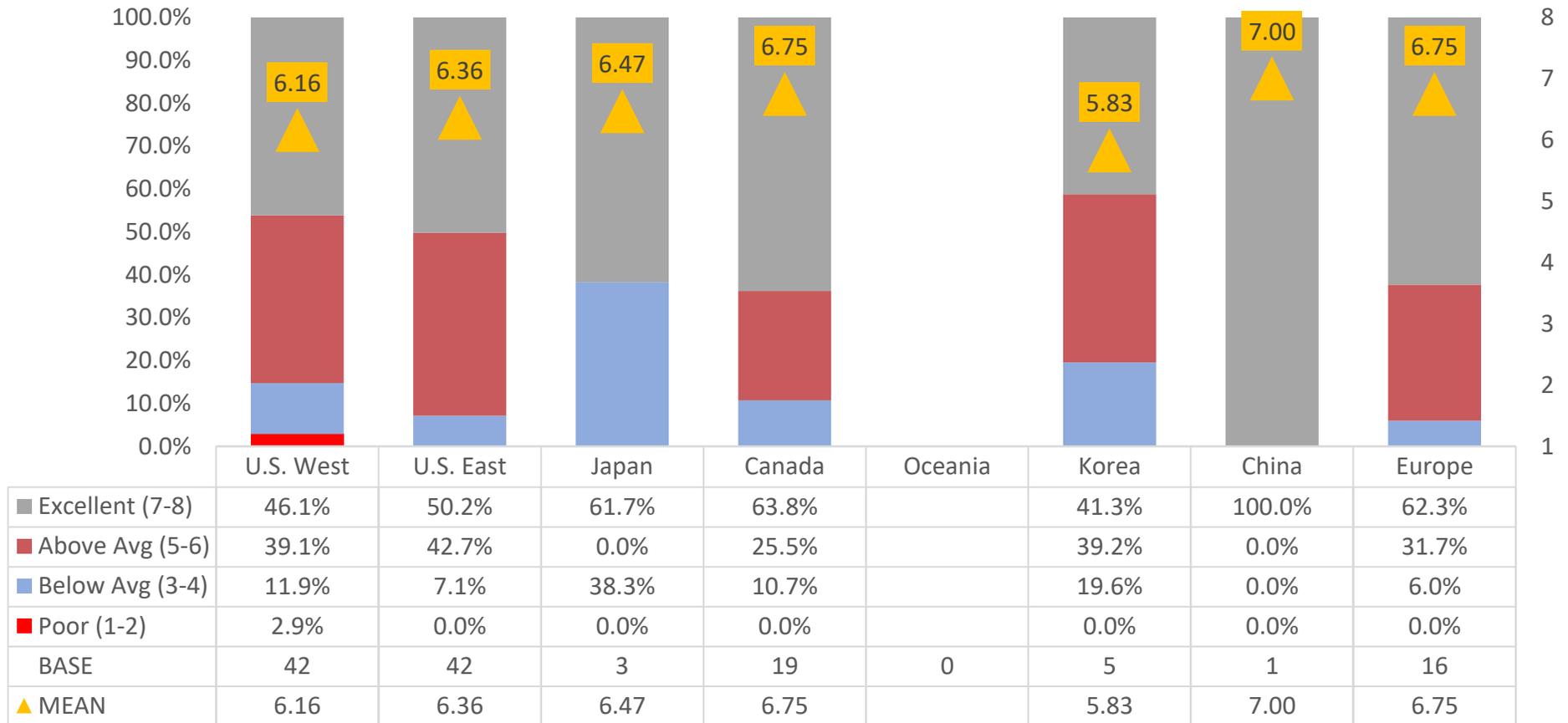
CULTURAL ACTIVITIES - KAUA'I

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



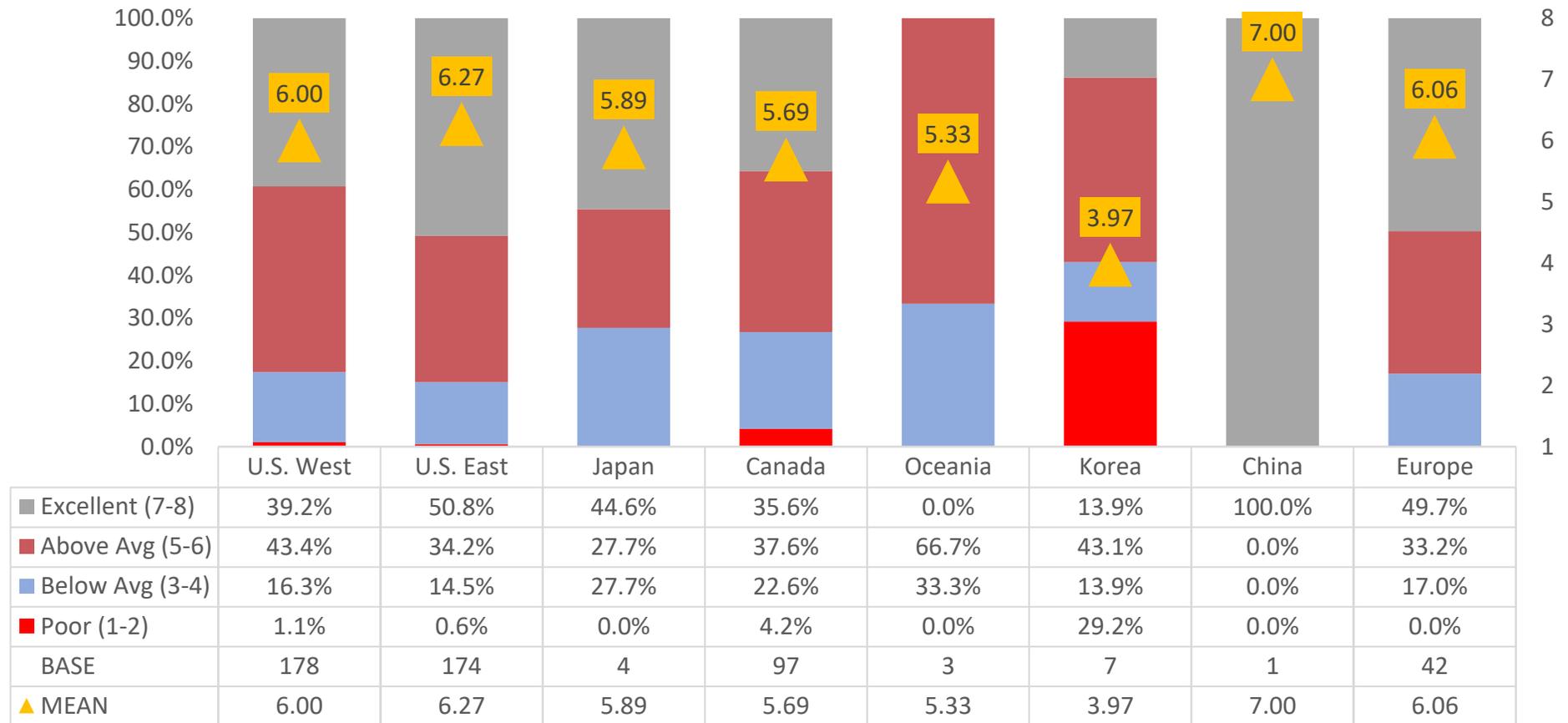
VOLUNTEER ACTIVITIES - KAUA'I

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



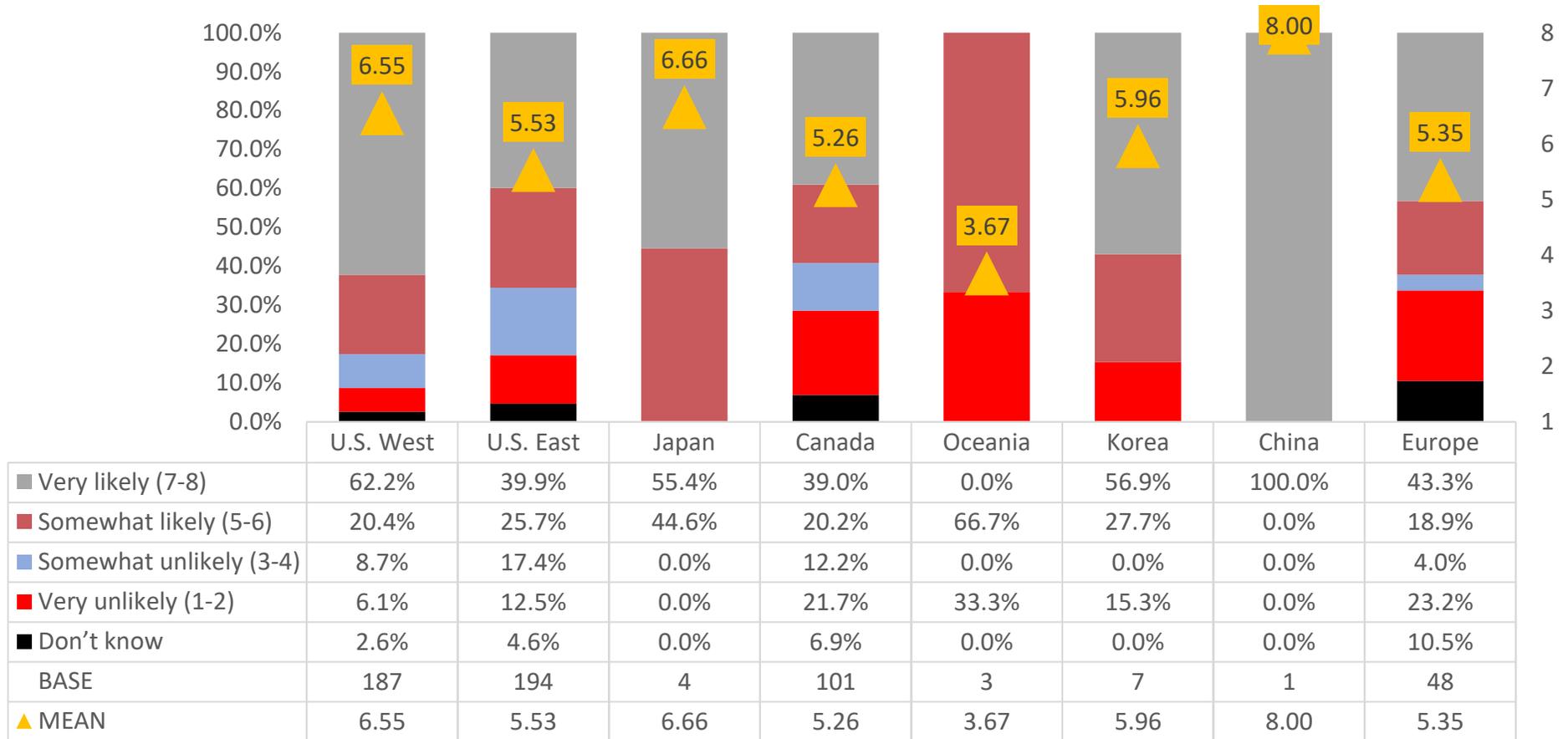
VALUE FOR THE MONEY - KAUA'I

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



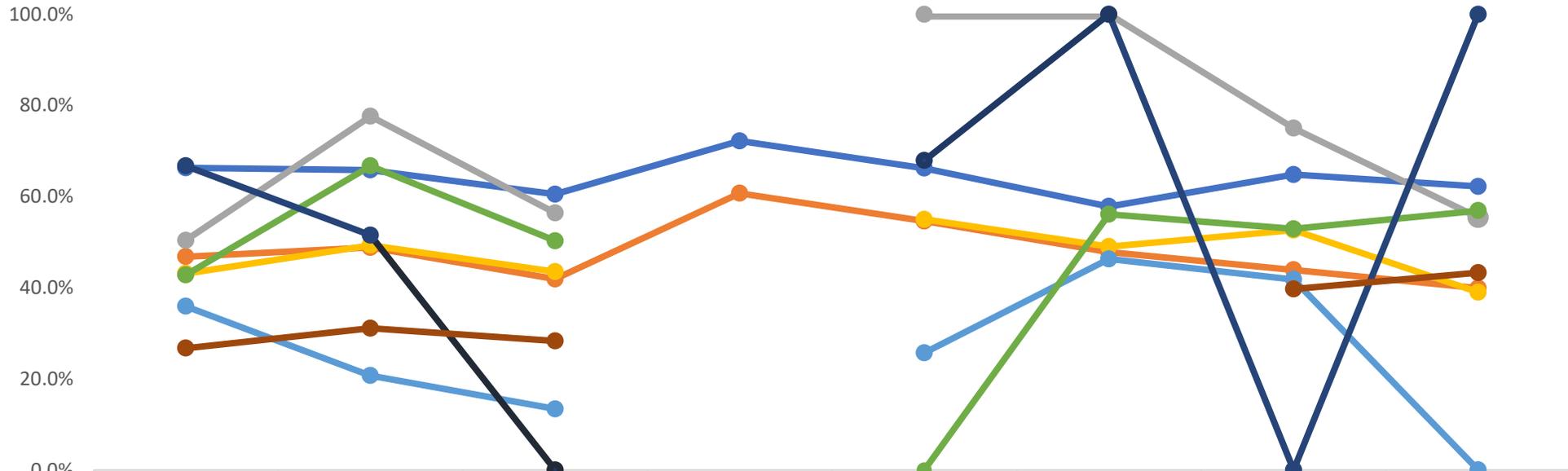
LIKELIHOOD OF RETURN VISIT - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	66.3%	65.8%	60.5%	72.2%	66.2%	57.8%	64.8%	62.2%
U.S. East	46.8%	48.8%	41.9%	60.7%	54.6%	47.8%	43.9%	39.9%
Japan	50.4%	77.6%	56.4%		100.0%	100.0%	75.0%	55.4%
Canada	43.1%	49.3%	43.5%		55.0%	49.0%	52.6%	39.0%
Oceania	35.9%	20.7%	13.4%		25.7%	46.3%	41.8%	0.0%
Korea	42.8%	66.7%	50.3%		0.0%	56.1%	52.9%	56.9%
China	66.7%	51.5%	0.0%		67.9%	100.0%	0.0%	100.0%
Europe	26.7%	31.1%	28.3%				39.7%	43.3%

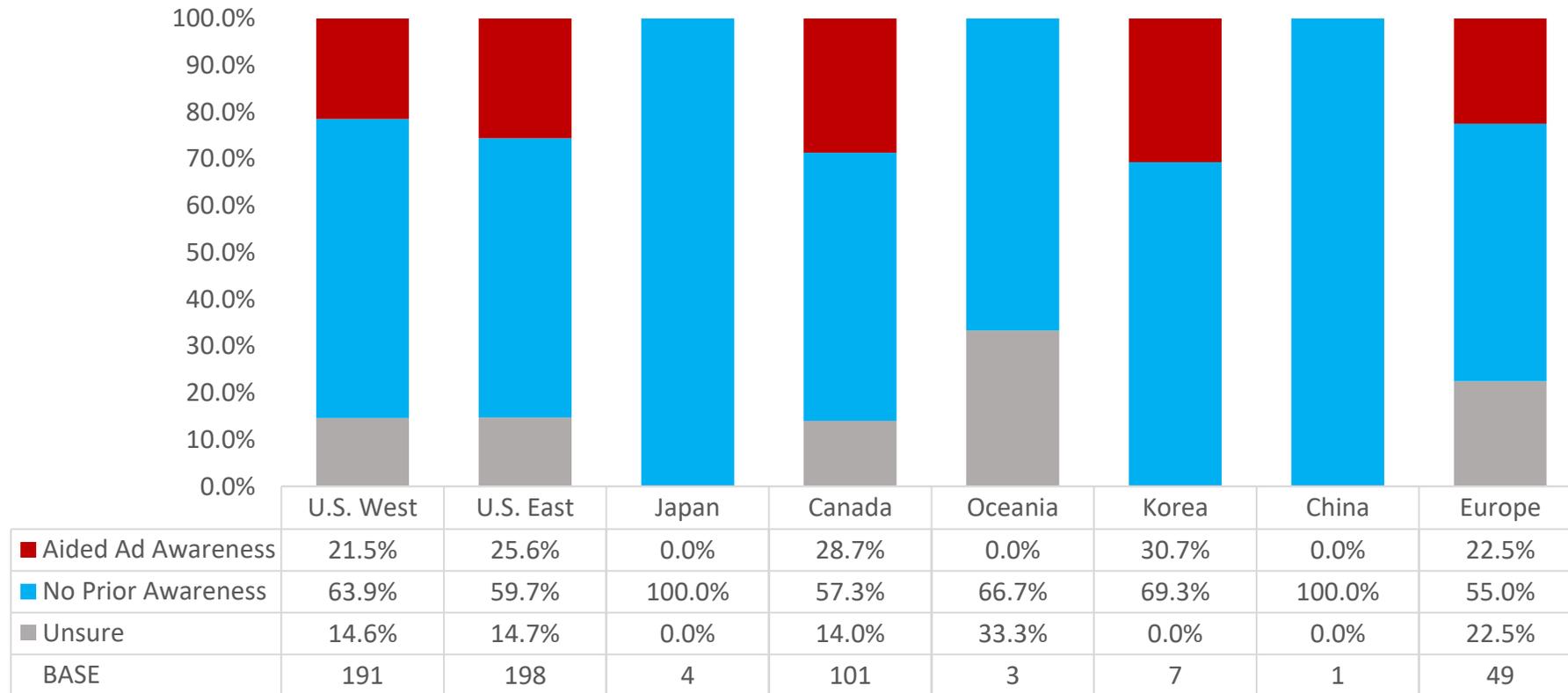
P= Preliminary Data

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

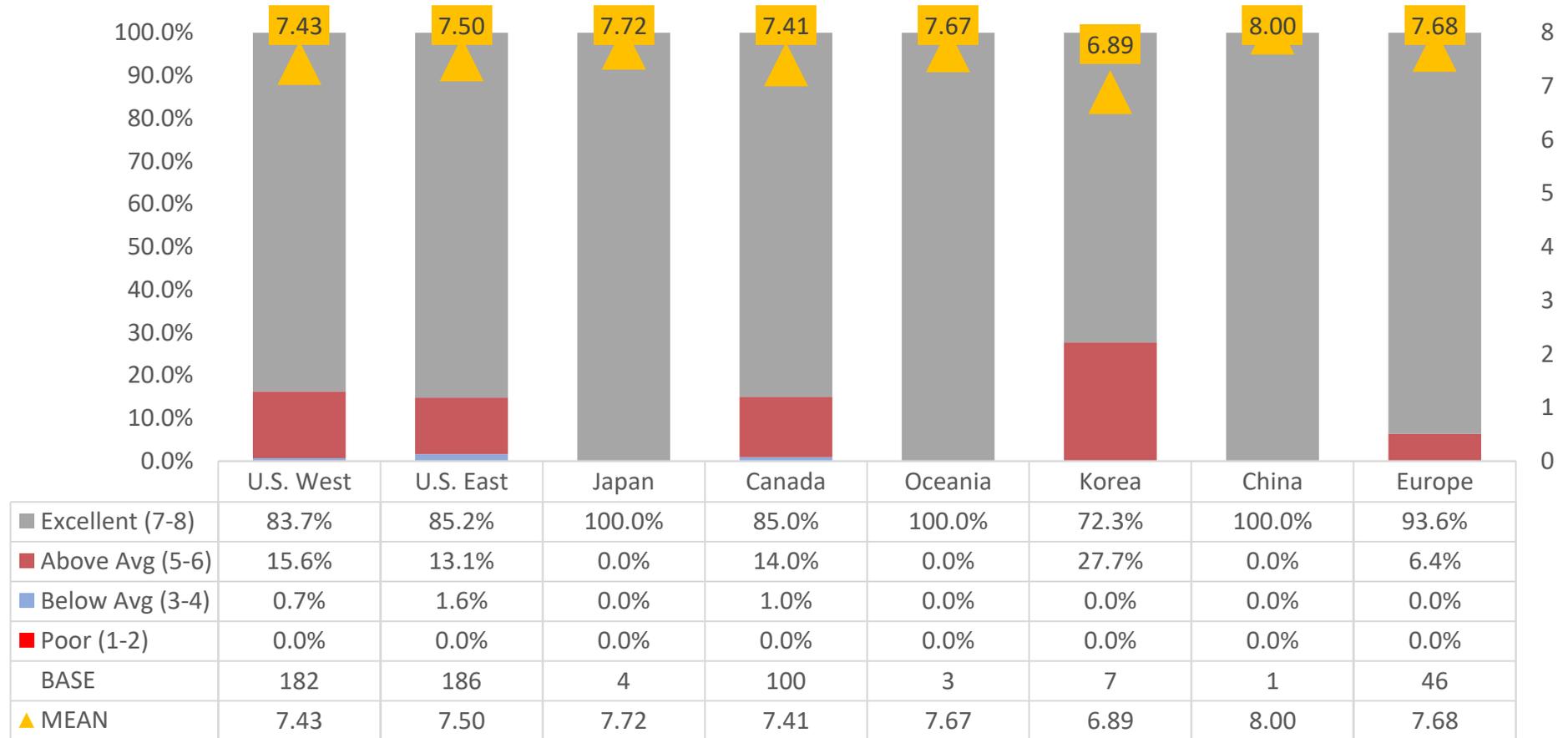


MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	48.9%	50.6%	83.1%	41.0%	33.3%	100.0%	56.9%	58.6%
Outdoor or sporting activities and events	14.0%	16.3%	27.7%	10.9%	33.3%	0.0%	0.0%	18.3%
Social media posts and videos	9.4%	13.4%	16.9%	21.8%	33.3%	0.0%	13.9%	10.4%
Hawaiian cultural experiences and Hawaiian cultural events	13.0%	19.4%	0.0%	15.8%	33.3%	0.0%	0.0%	12.2%
Television programs or movies filmed in Hawai'i	5.5%	10.3%	27.7%	12.9%	33.3%	0.0%	0.0%	12.3%
Hawaiian music	7.3%	7.1%	0.0%	7.0%	0.0%	0.0%	0.0%	6.0%
Attend a festival or other event	2.7%	5.6%	0.0%	3.0%	0.0%	0.0%	29.2%	0.0%
BASE	190	195	4	101	3	1	7	49

FRIENDLINESS OF KAUA‘I RESIDENTS

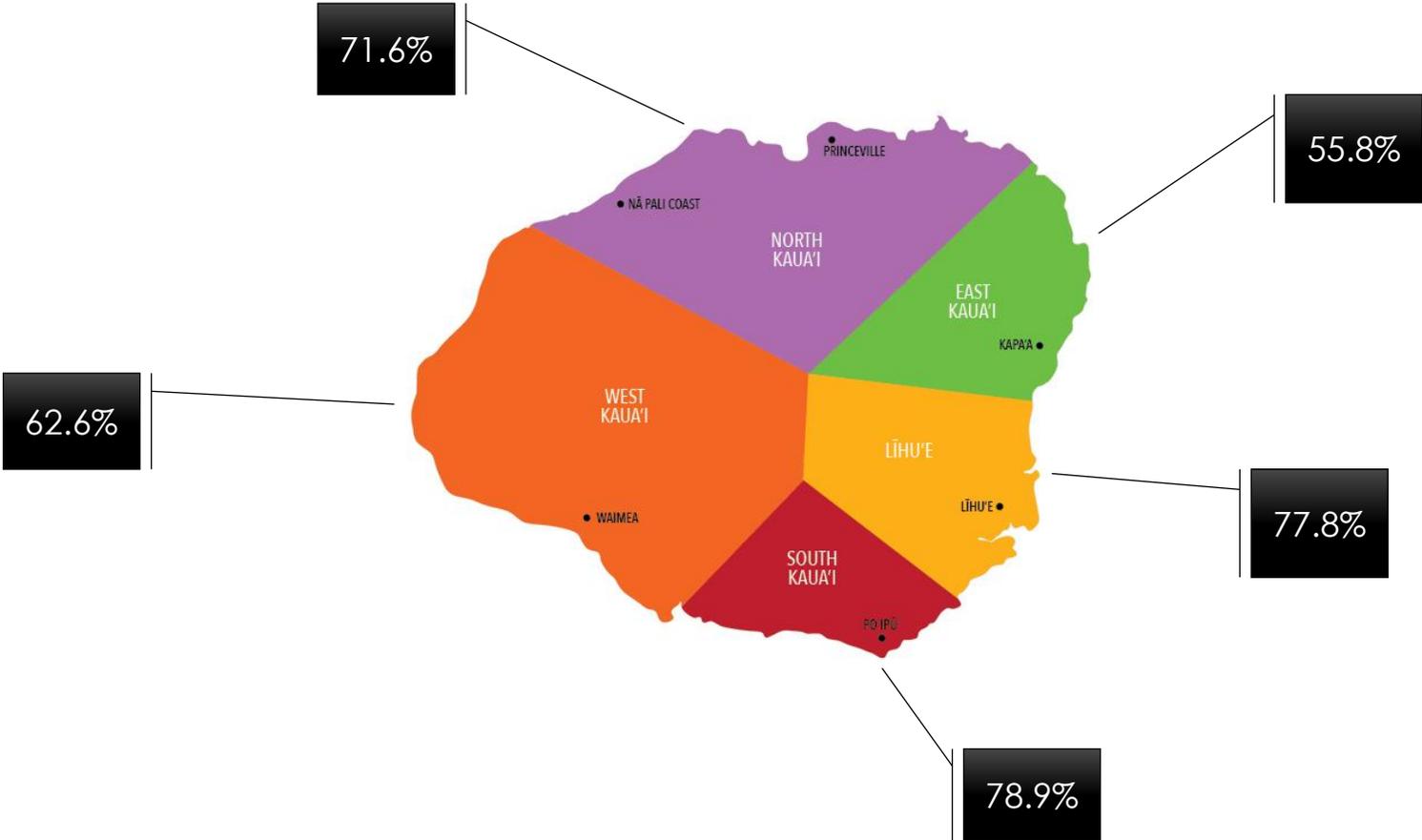
8-pt Rating Scale
8=Excellent / 1=Poor



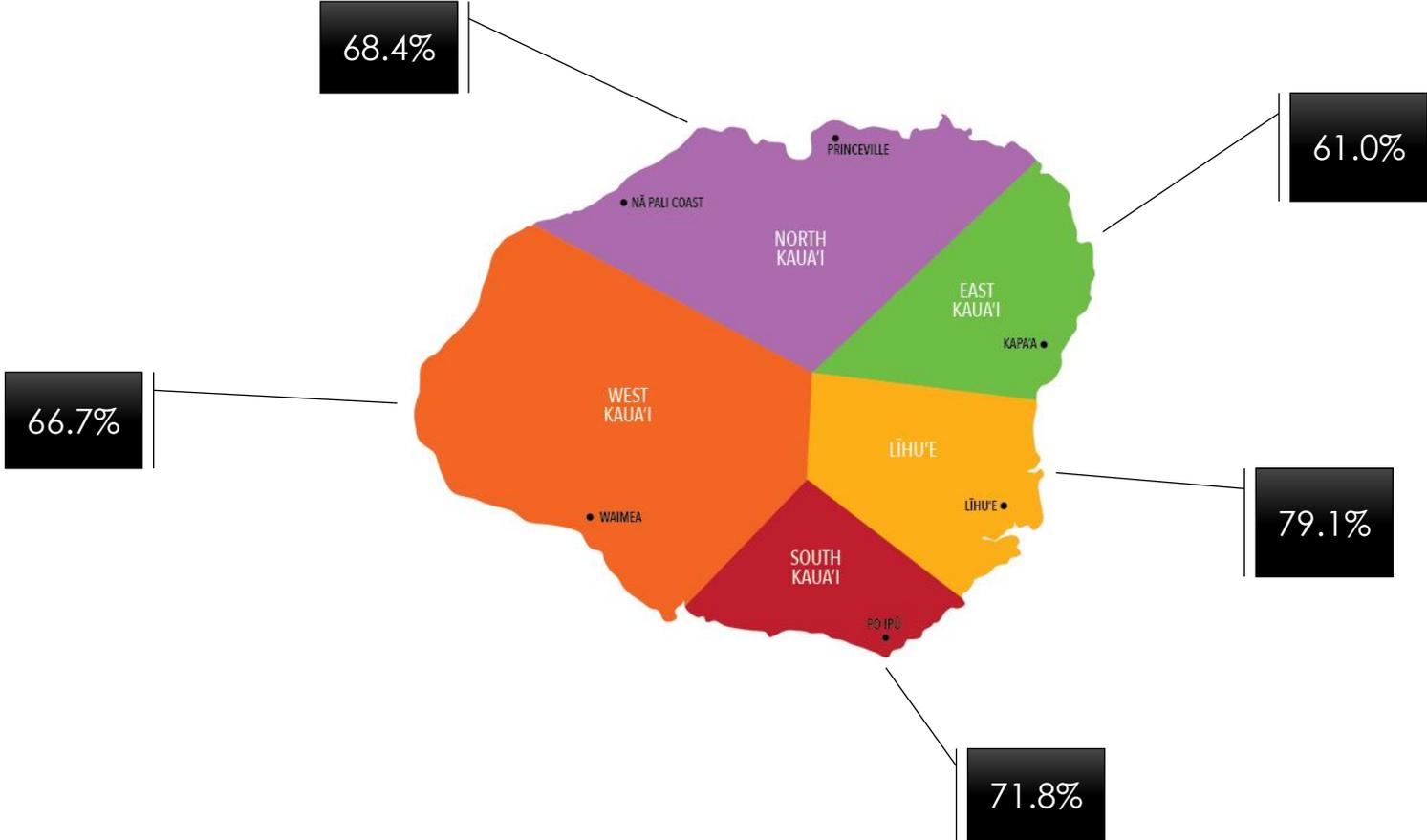
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	46.6%	26.0%	27.7%	31.6%	0.0%	100.0%	0.0%	24.1%
Friend recommendation	29.7%	28.4%	0.0%	22.9%	66.7%	0.0%	27.7%	43.6%
Cruise line stop/part of tour	1.1%	12.9%	0.0%	13.9%	0.0%	0.0%	0.0%	9.2%
Attending Conference/ Event	5.9%	6.1%	27.7%	3.0%	0.0%	0.0%	29.2%	2.3%
Location/ Never been, but went to other islands	2.2%	3.8%	0.0%	7.1%	0.0%	0.0%	0.0%	2.3%
Social Media Post	1.6%	3.3%	27.7%	6.1%	0.0%	0.0%	15.3%	2.3%
Article/ Blog	2.6%	3.9%	0.0%	1.1%	0.0%	0.0%	13.9%	2.3%
Visiting Family/ Friends	2.3%	3.3%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%

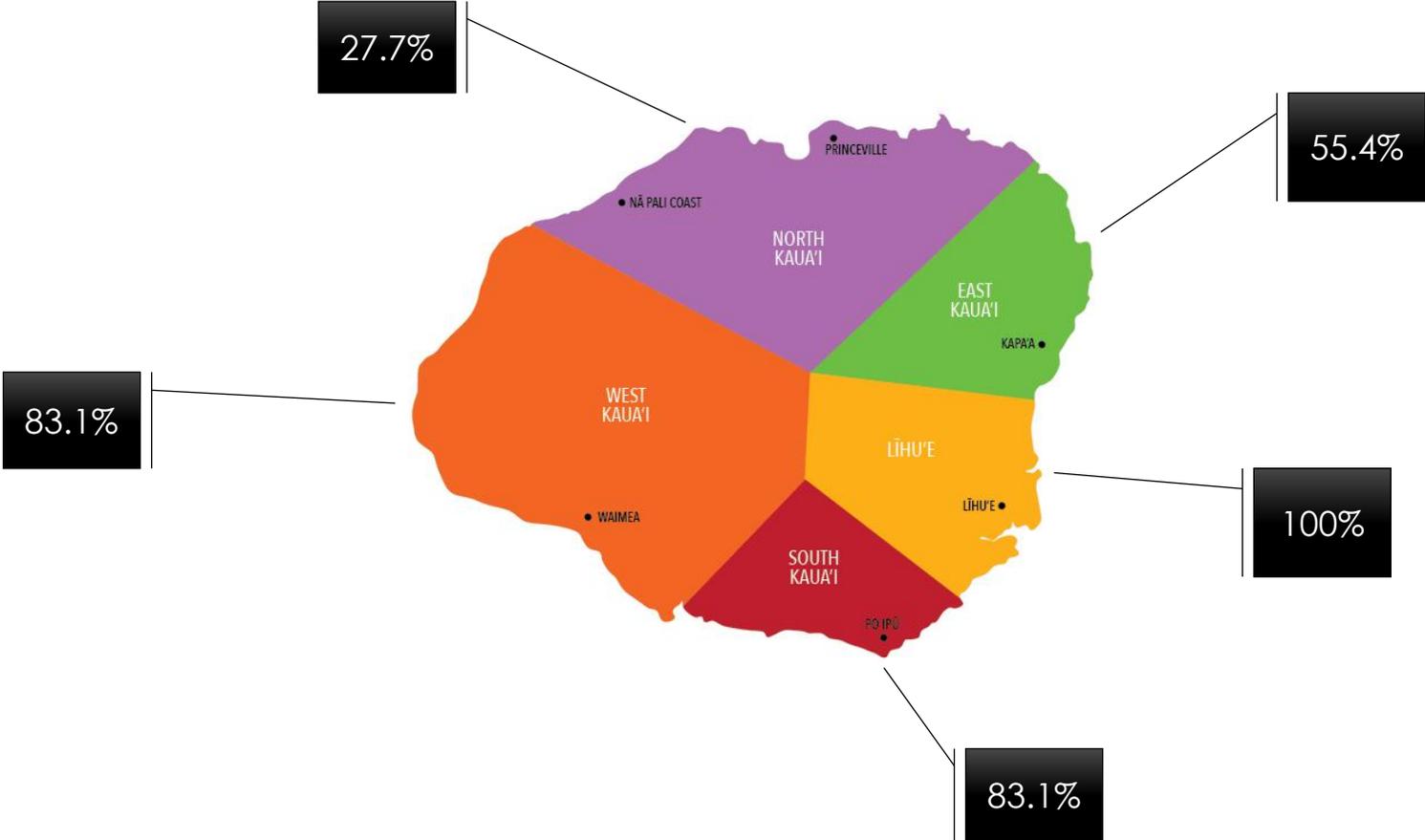
AREAS VISITED KAUA'I U.S. WEST



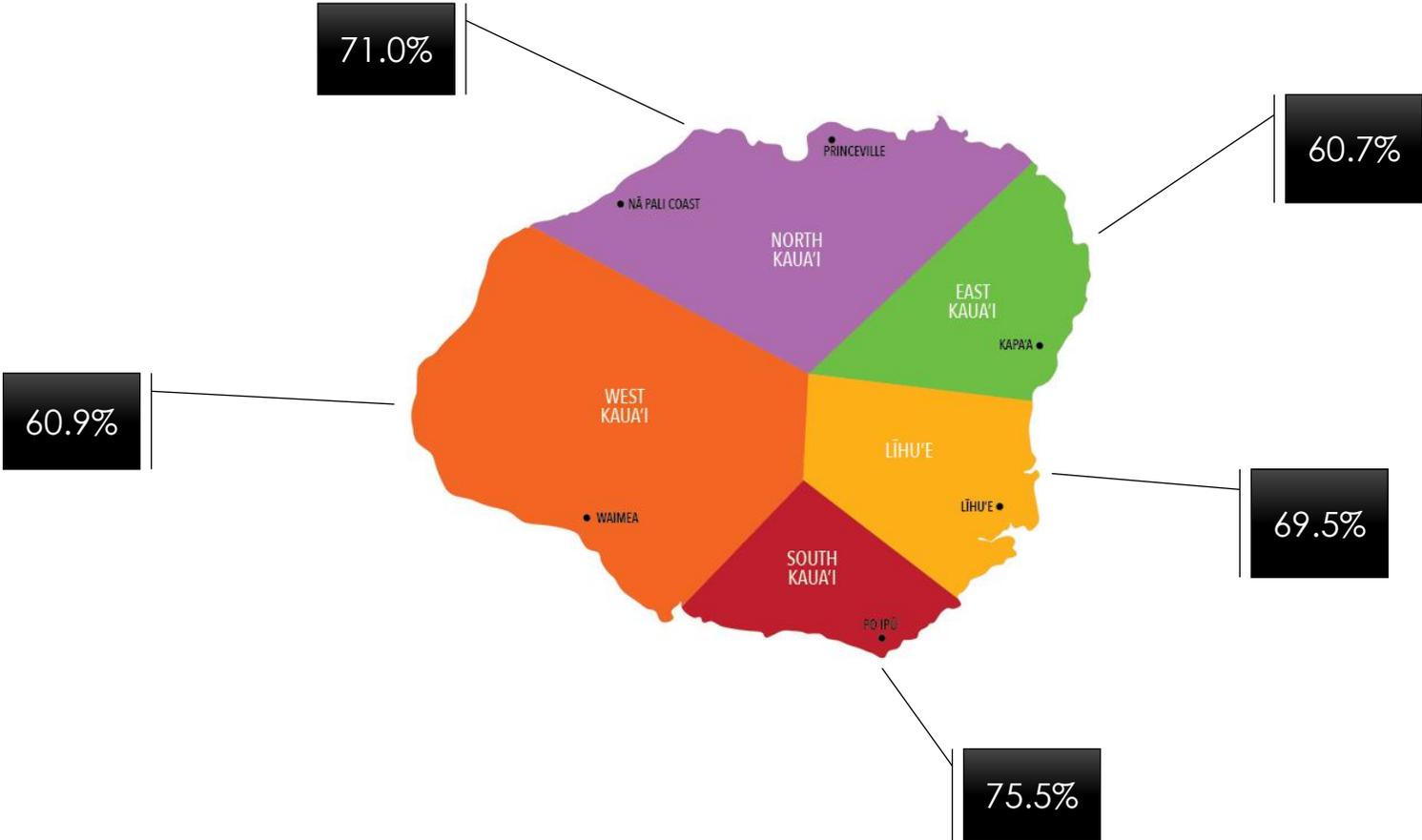
AREAS VISITED KAUA'I U.S. EAST



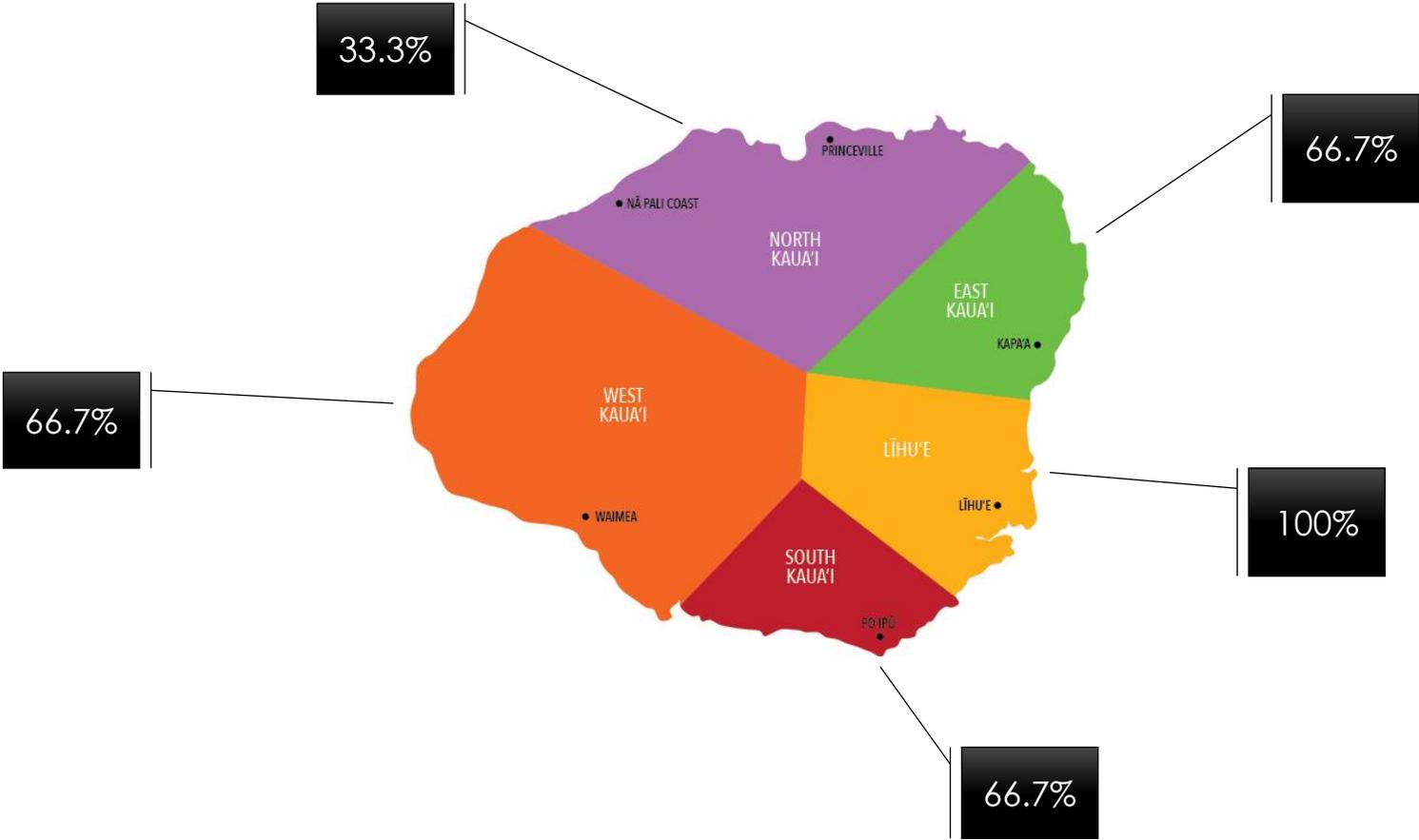
AREAS VISITED KAUA'I JAPAN



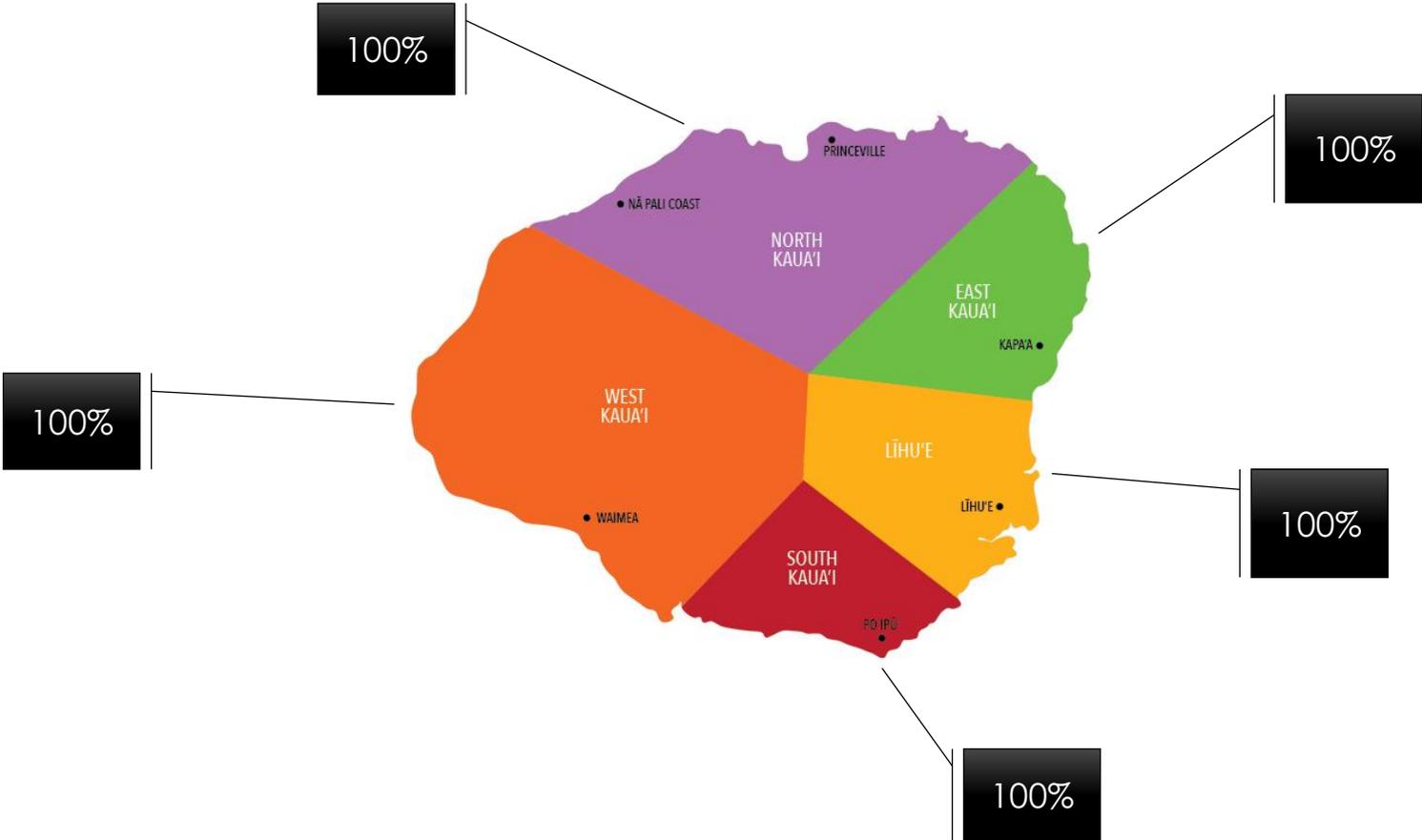
AREAS VISITED KAUA'I CANADA



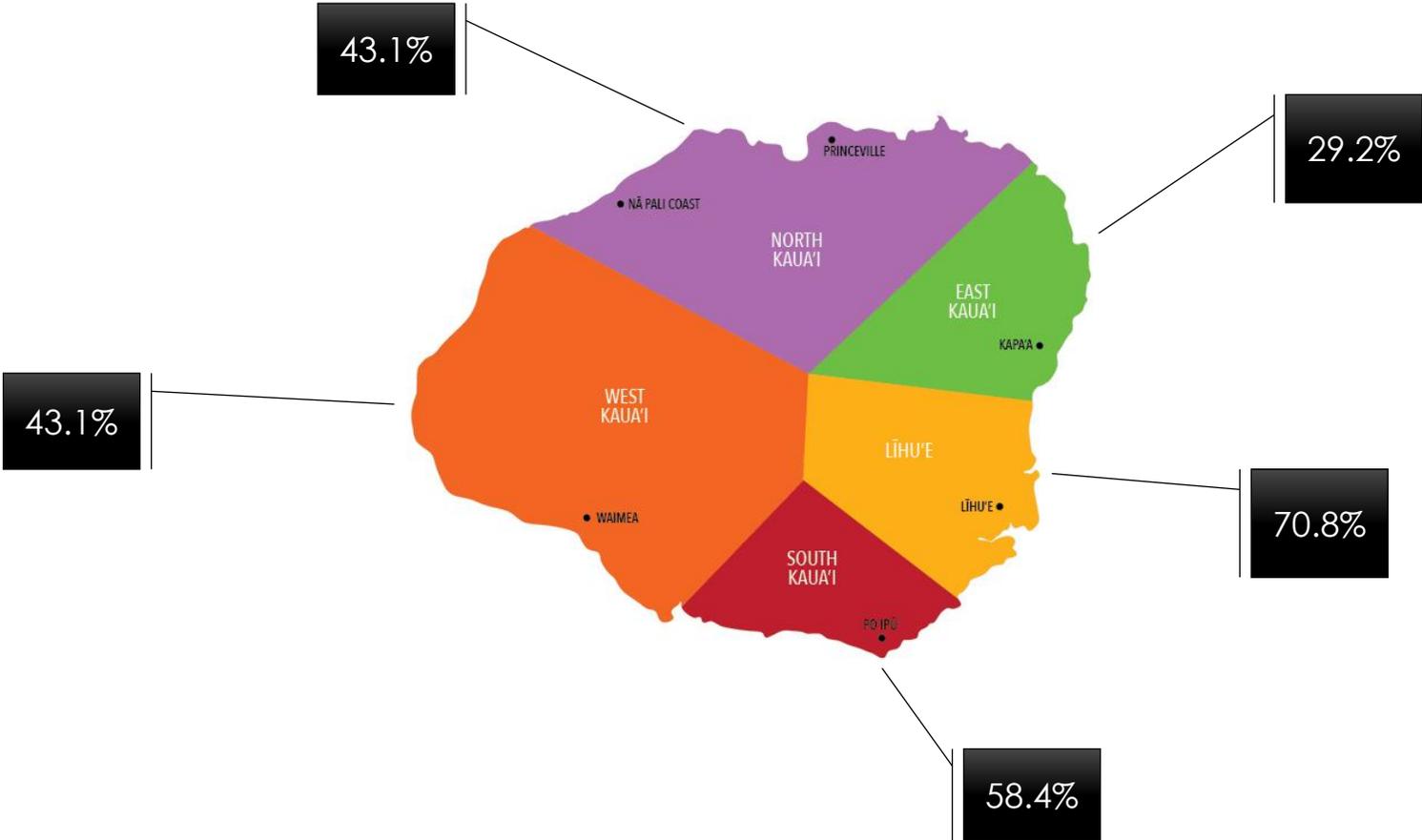
AREAS VISITED KAUA'I OCEANIA



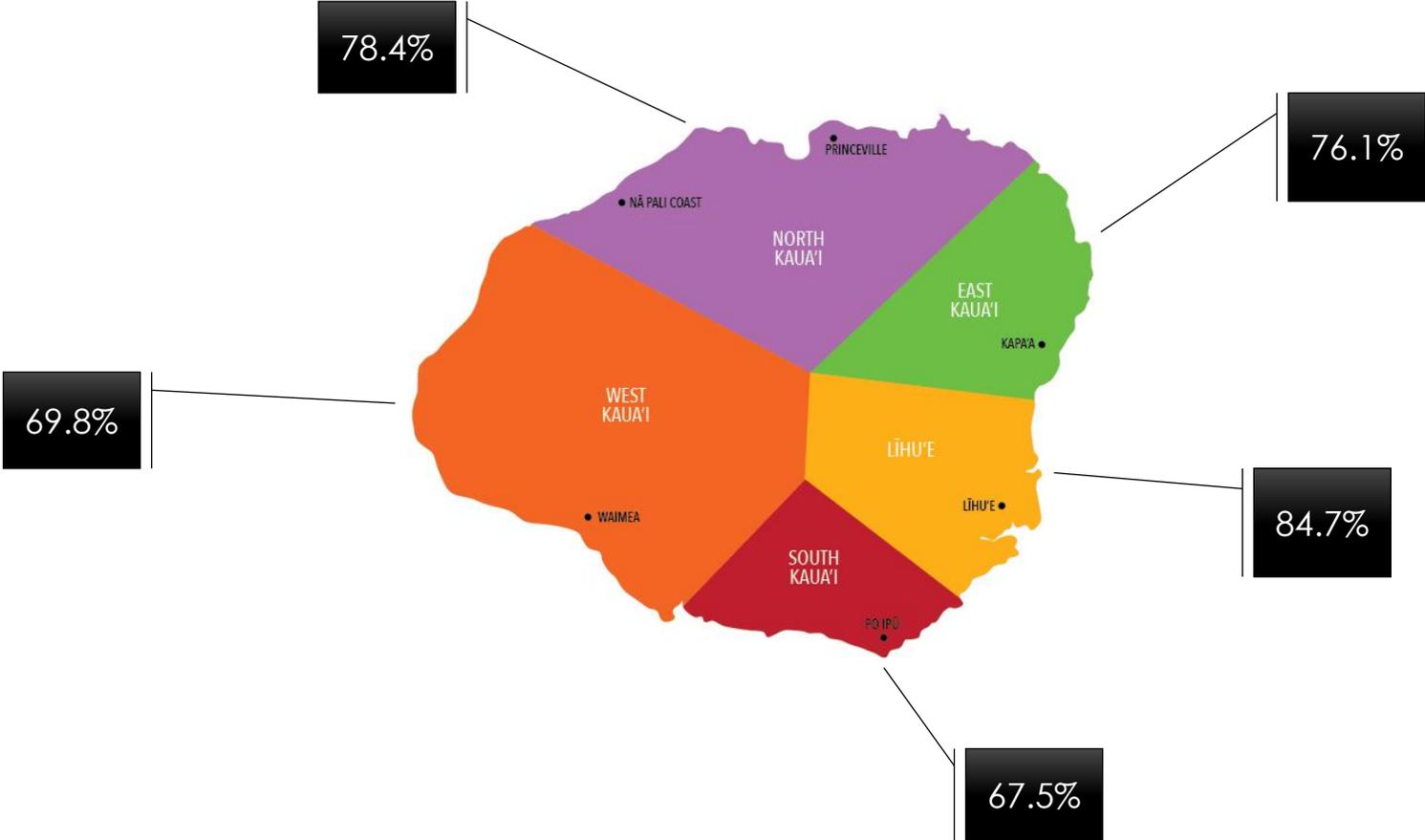
AREAS VISITED KAUA'I CHINA



AREAS VISITED KAUA'I KOREA



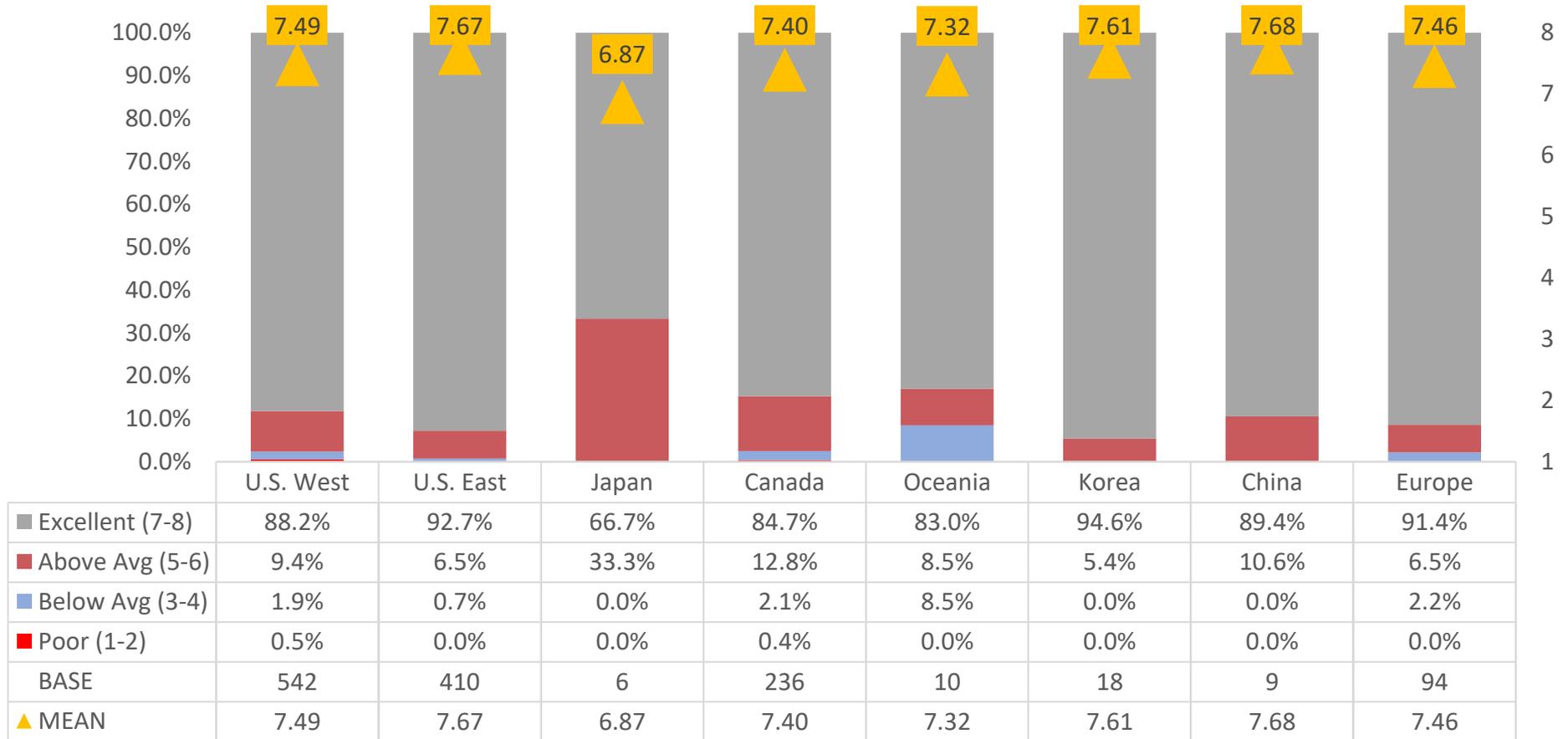
AREAS VISITED KAUA'I EUROPE



Section 9 – Maui

SATISFACTION - MAUI

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

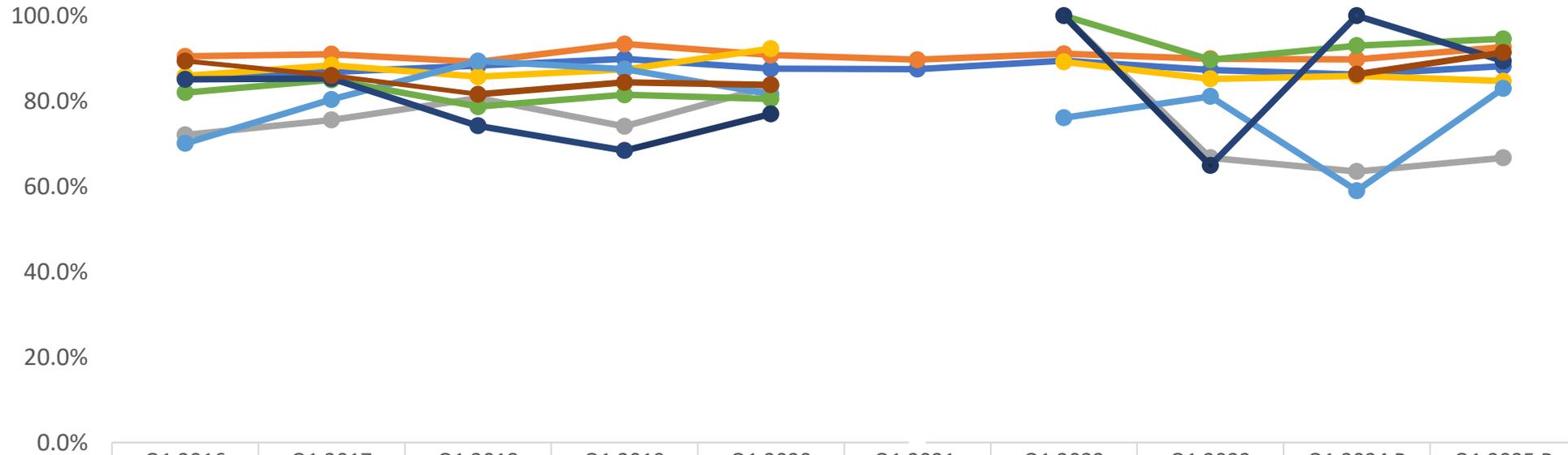


SATISFACTION - MAUI

- **Gender:** Female respondents from **U.S. East** give higher satisfaction scores than male respondents.
- **Education:** Those with a college degree from **U.S. East** are more satisfied with their stay than those without a college degree from this visitor market.

SATISFACTION - MAUI

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	85.6%	86.8%	88.3%	89.9%	87.6%	87.5%	89.5%	87.3%	86.2%	88.2%
U.S. East	90.5%	91.0%	89.2%	93.4%	90.8%	89.7%	91.1%	89.9%	89.8%	92.7%
Japan	72.1%	75.6%	80.7%	74.1%	83.5%		100.0%	66.7%	63.5%	66.7%
Canada	85.9%	88.4%	85.7%	87.4%	92.3%		89.2%	85.2%	85.9%	84.7%
Oceania	70.1%	80.4%	89.4%	87.5%	81.6%		76.1%	81.1%	59.0%	83.0%
Korea	82.0%	85.0%	78.7%	81.5%	80.5%		100.0%	89.7%	93.0%	94.6%
China	85.1%	85.3%	74.2%	68.4%	77.0%		100.0%	64.9%	100.0%	89.4%
Europe	89.4%	86.0%	81.6%	84.4%	83.8%				86.3%	91.4%

P= Preliminary Data

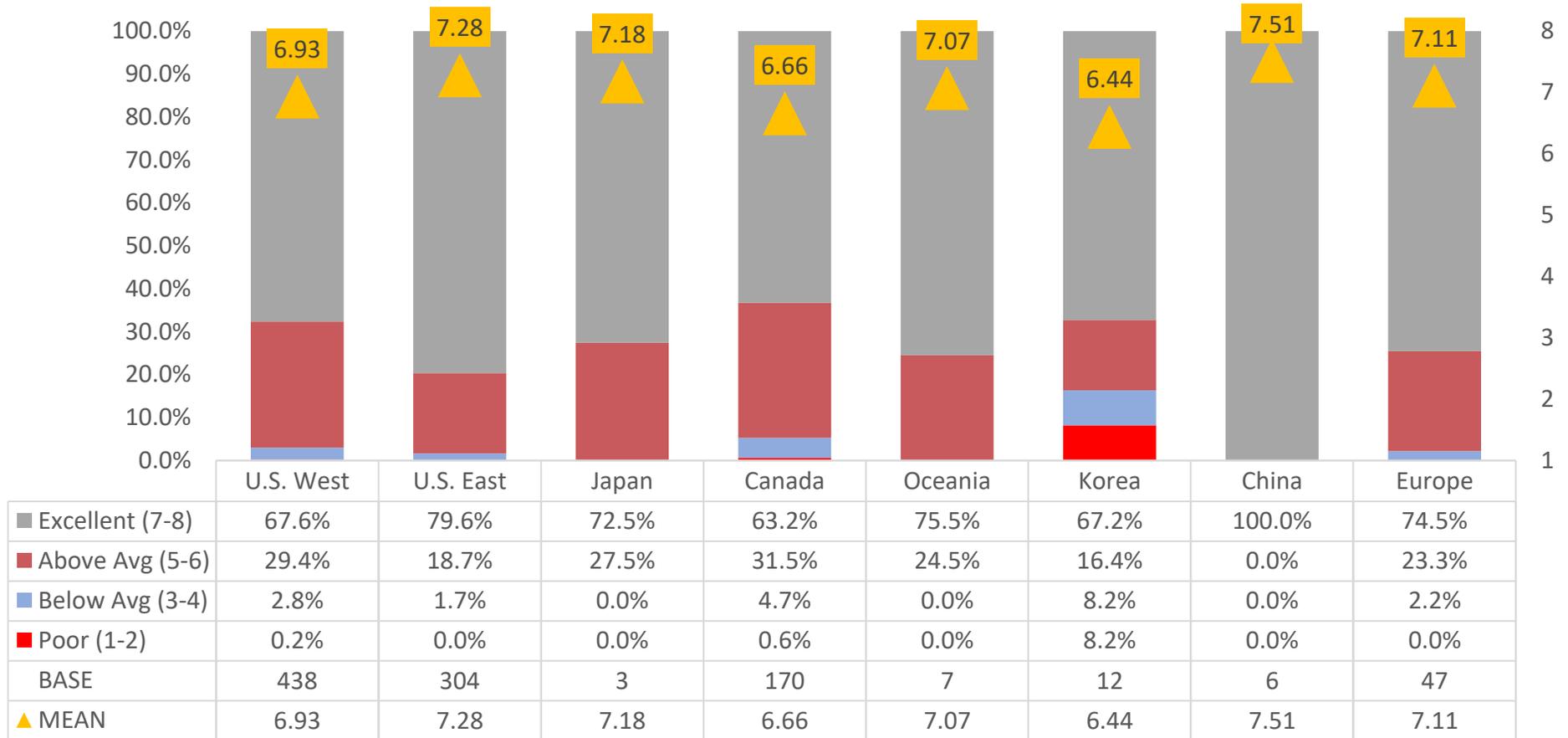
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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.



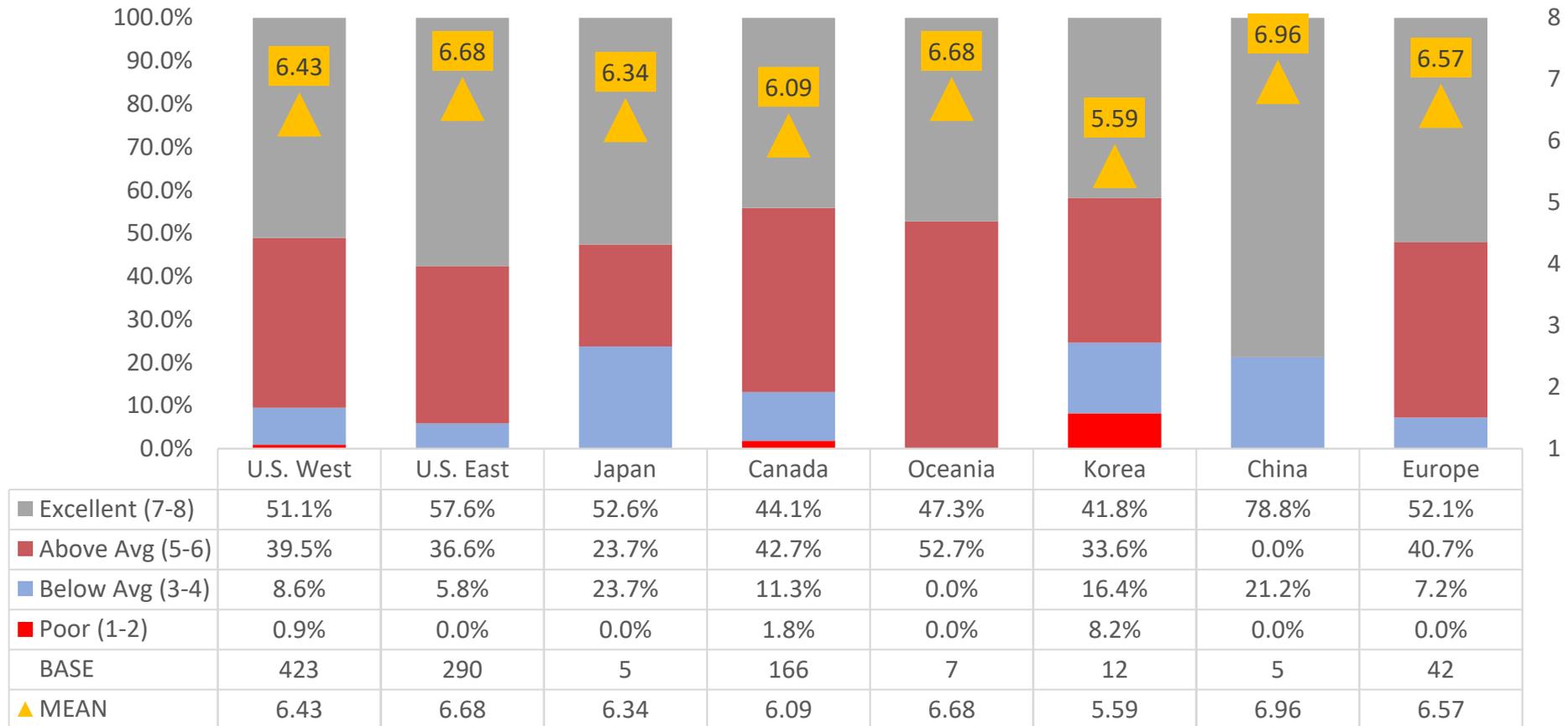
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



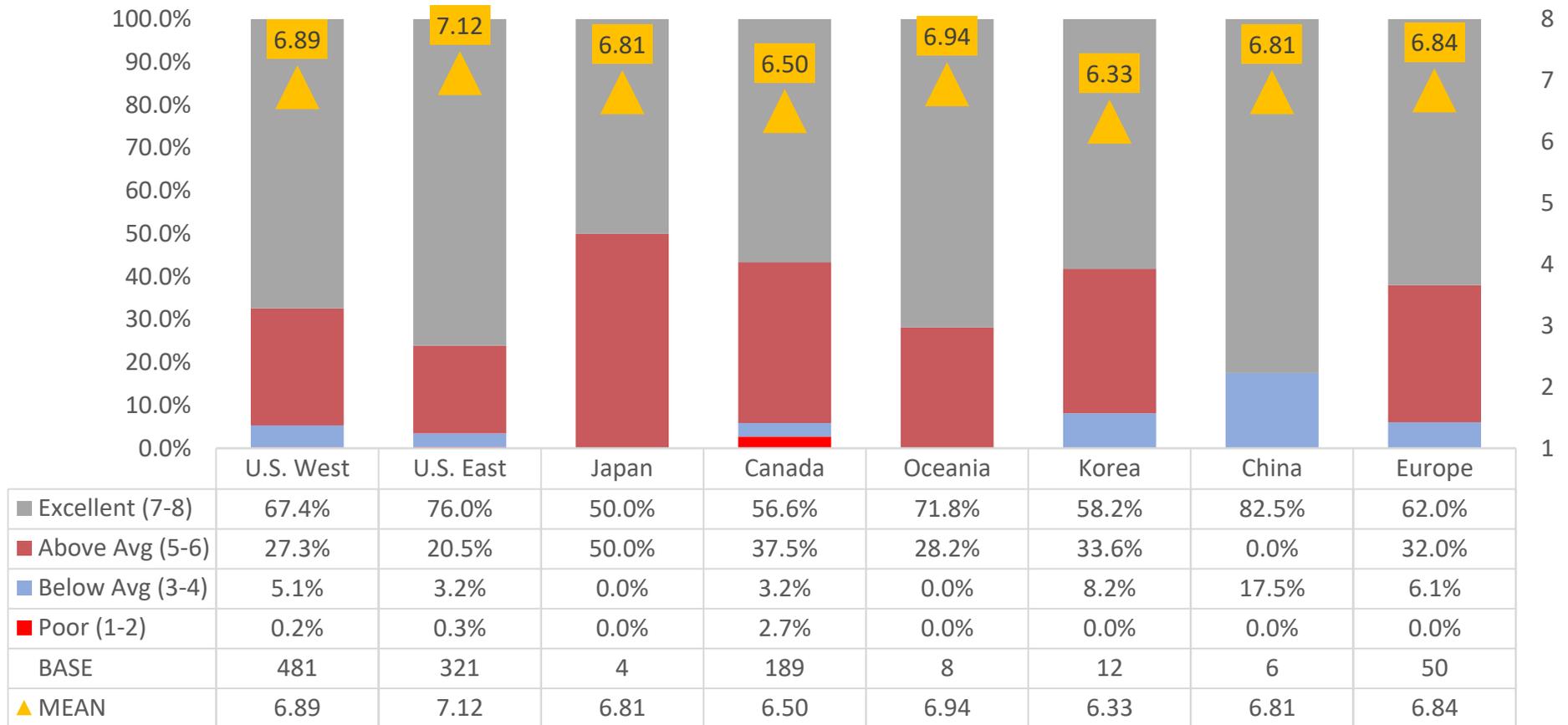
SHOPPING - MAUI

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



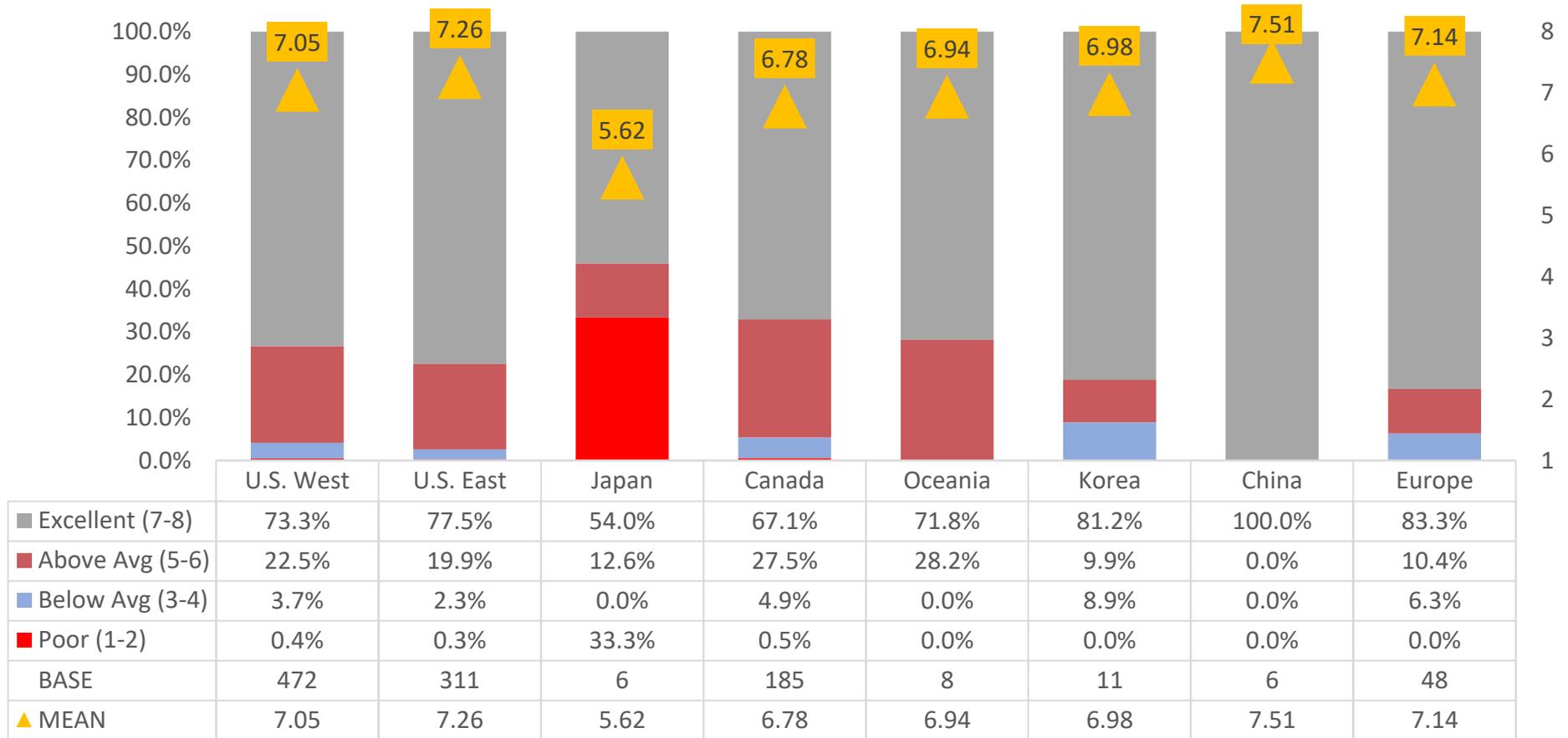
DINING/ FOOD & BEVERAGE - MAUI

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



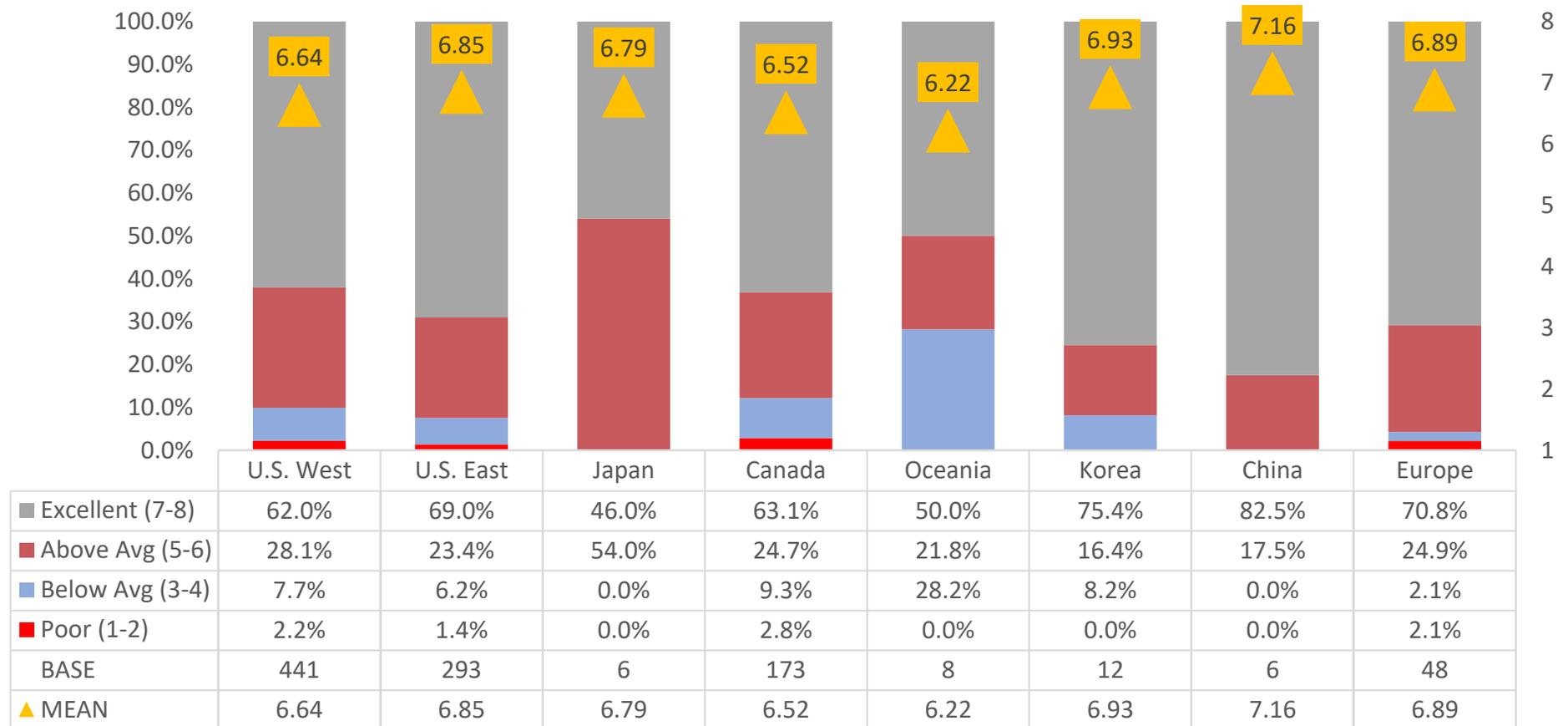
LODGING/ ACCOMMODATIONS - MAUI

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



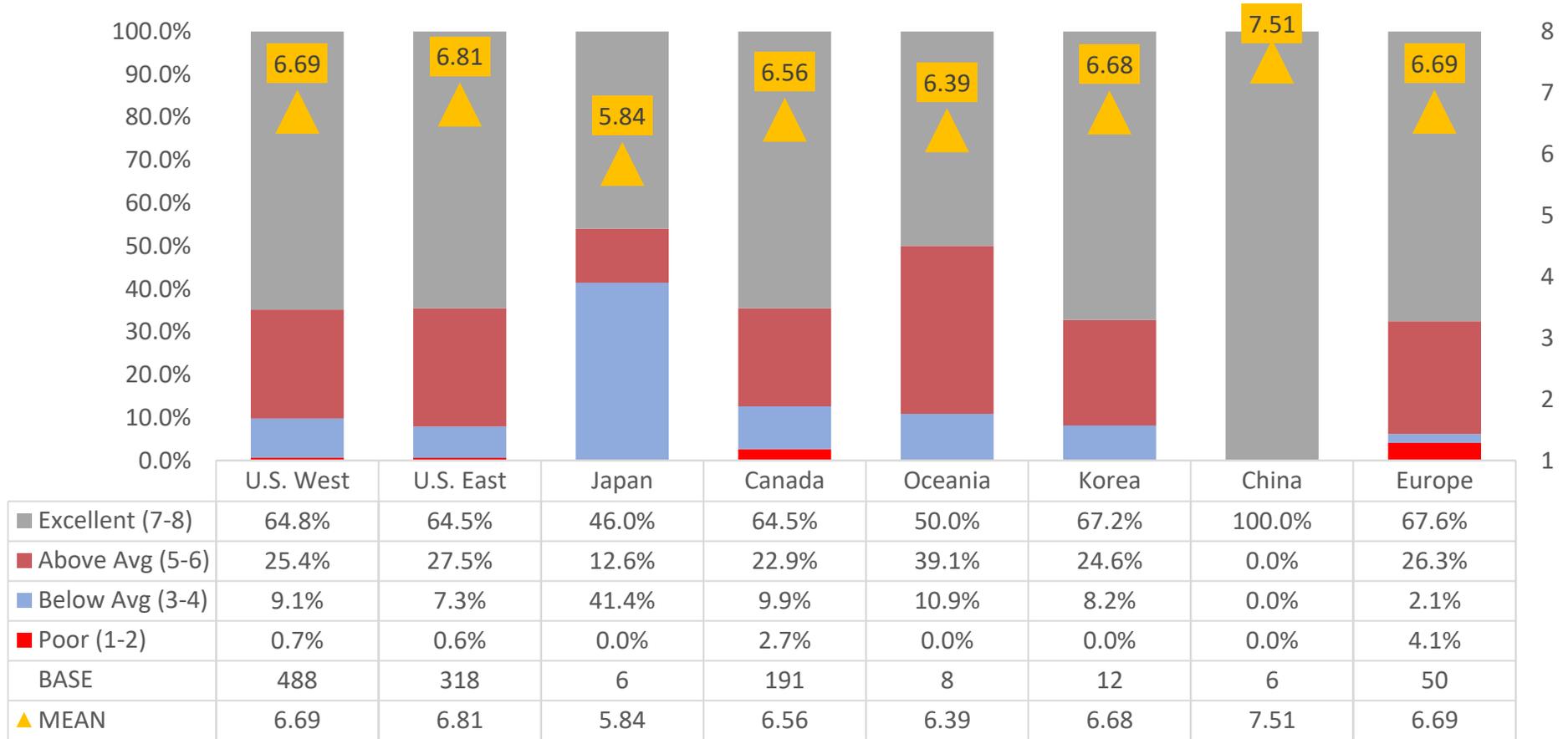
TRANSPORTATION ON ISLAND - MAUI

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



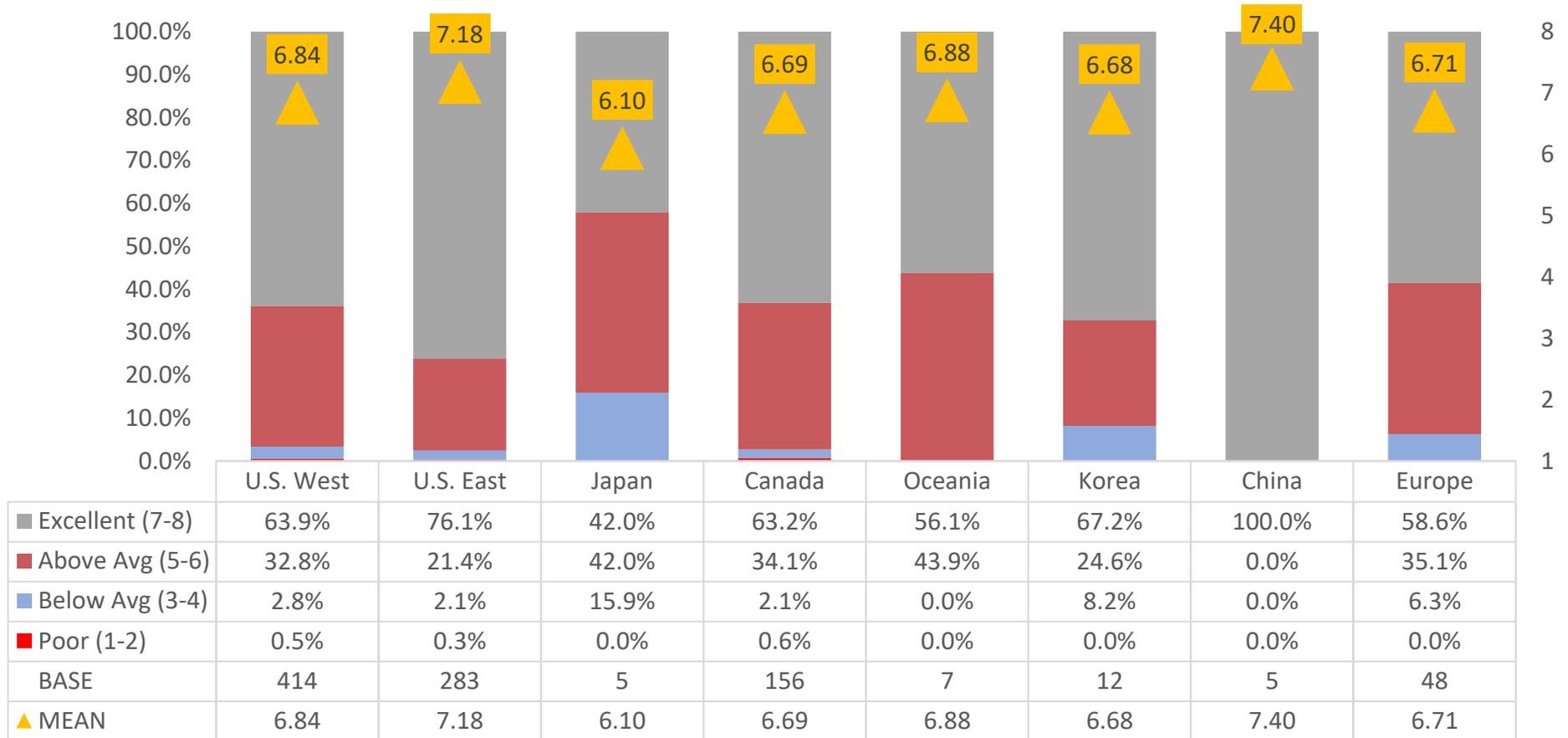
AIRPORT - MAUI

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



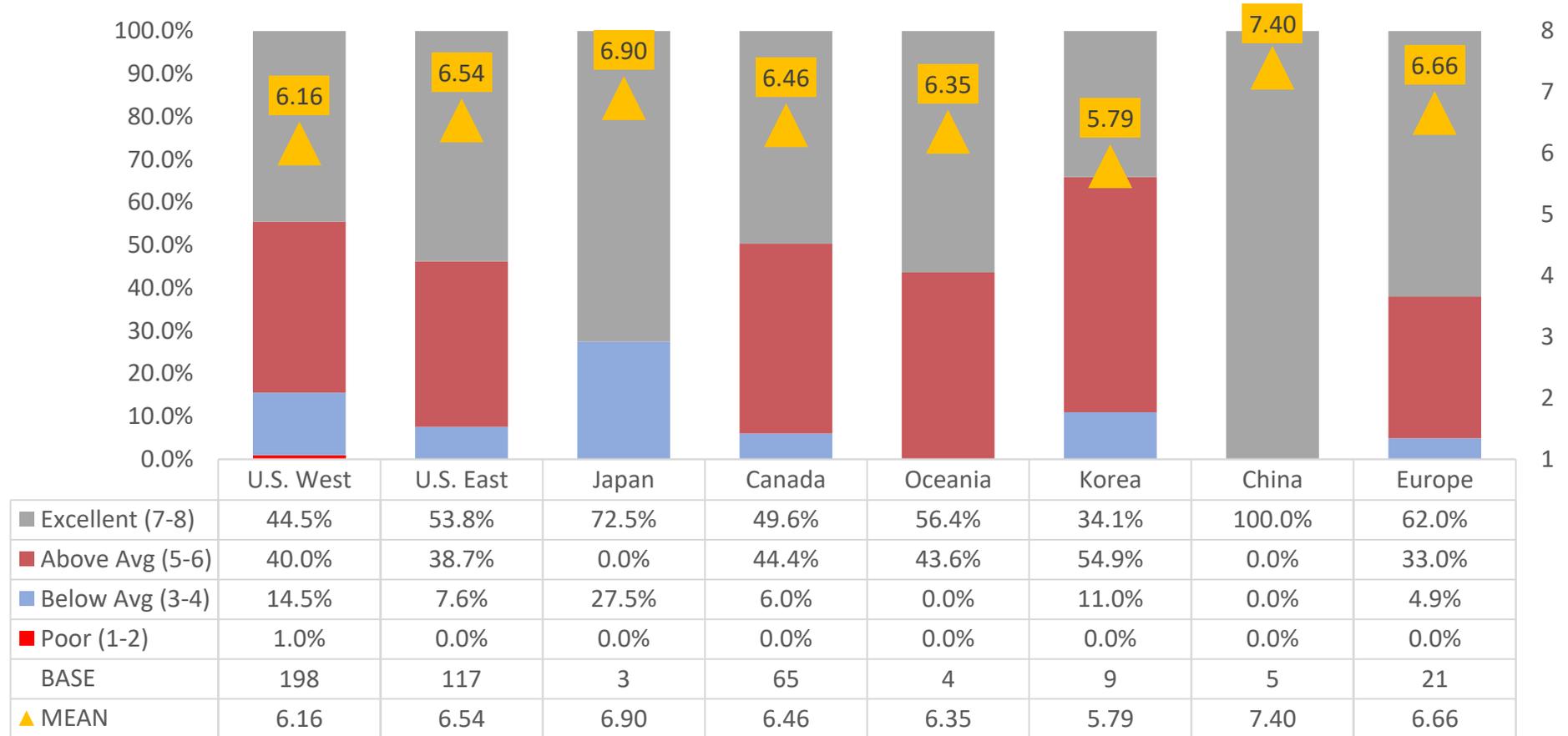
CULTURAL EXPERIENCES - MAUI

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



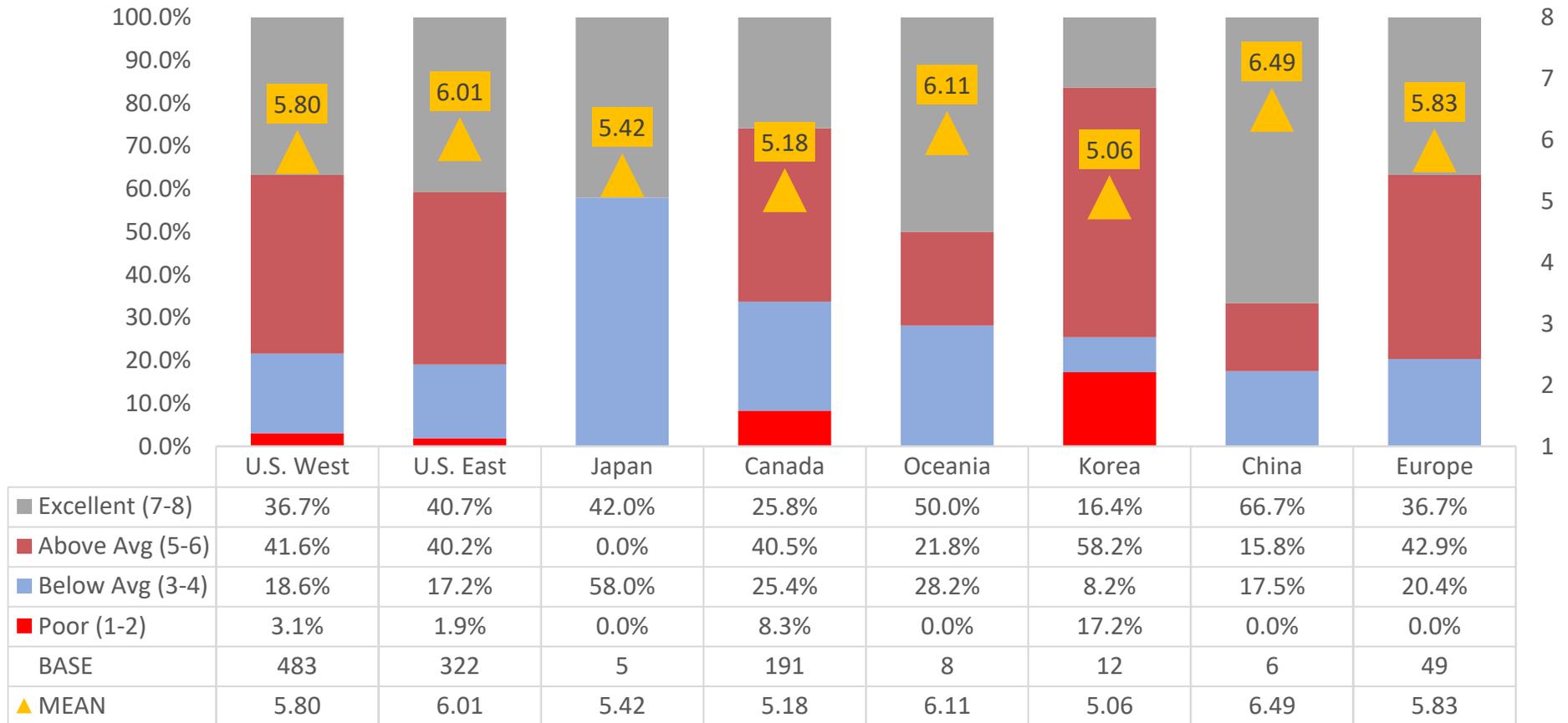
VOLUNTEER EXPERIENCES - MAUI

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



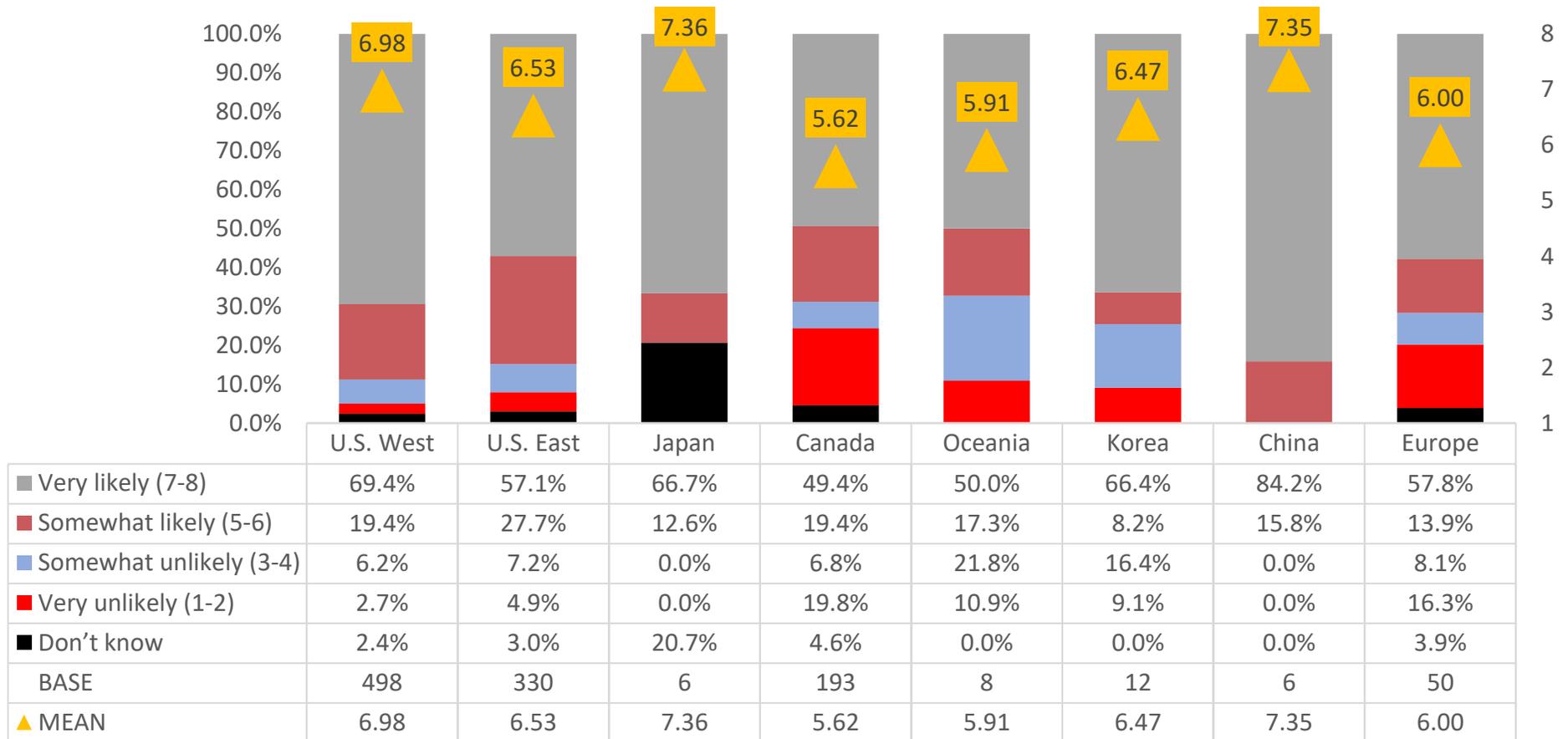
VALUE FOR THE MONEY - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

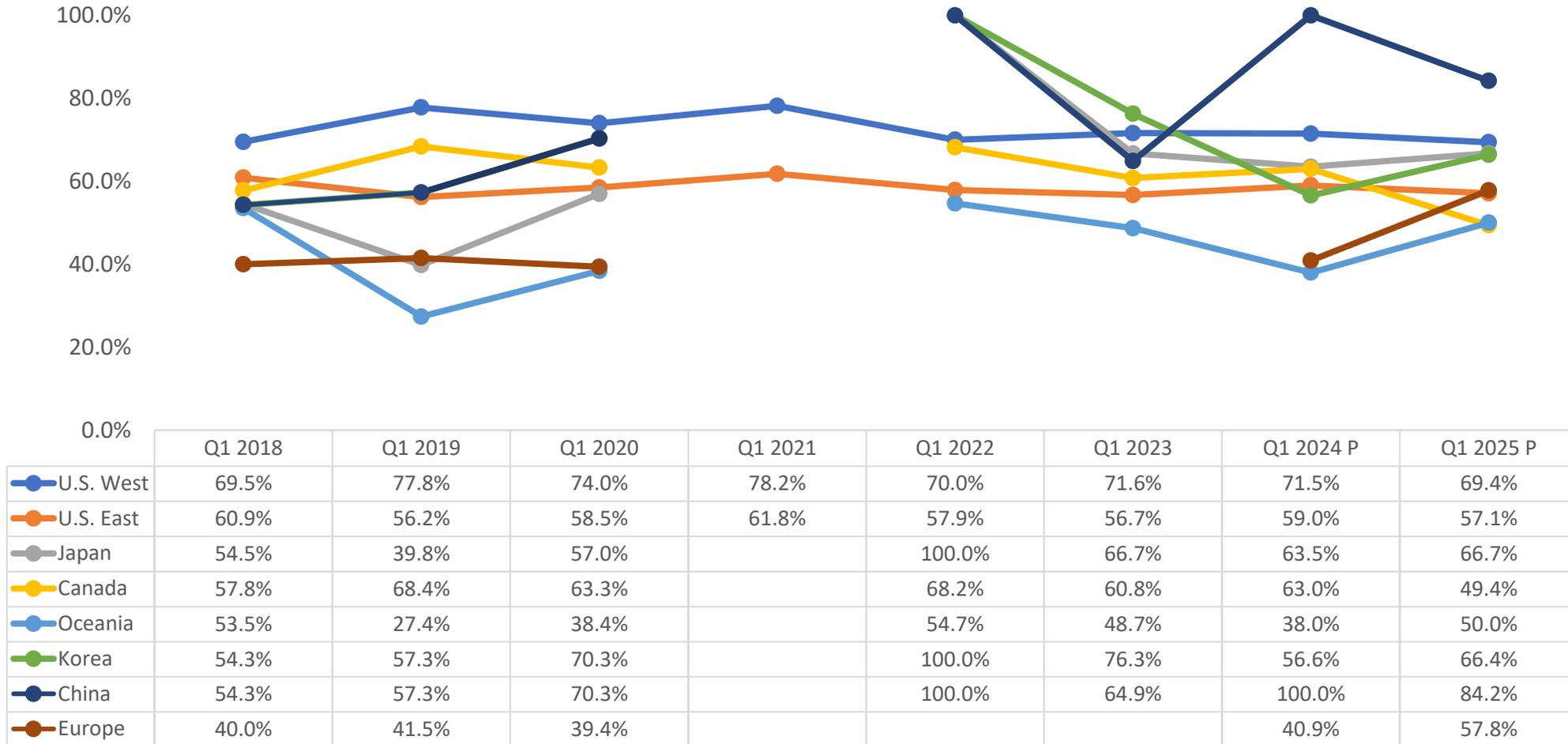
8-pt Rating Scale
8 = Very likely / 1 = Very unlikely



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

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



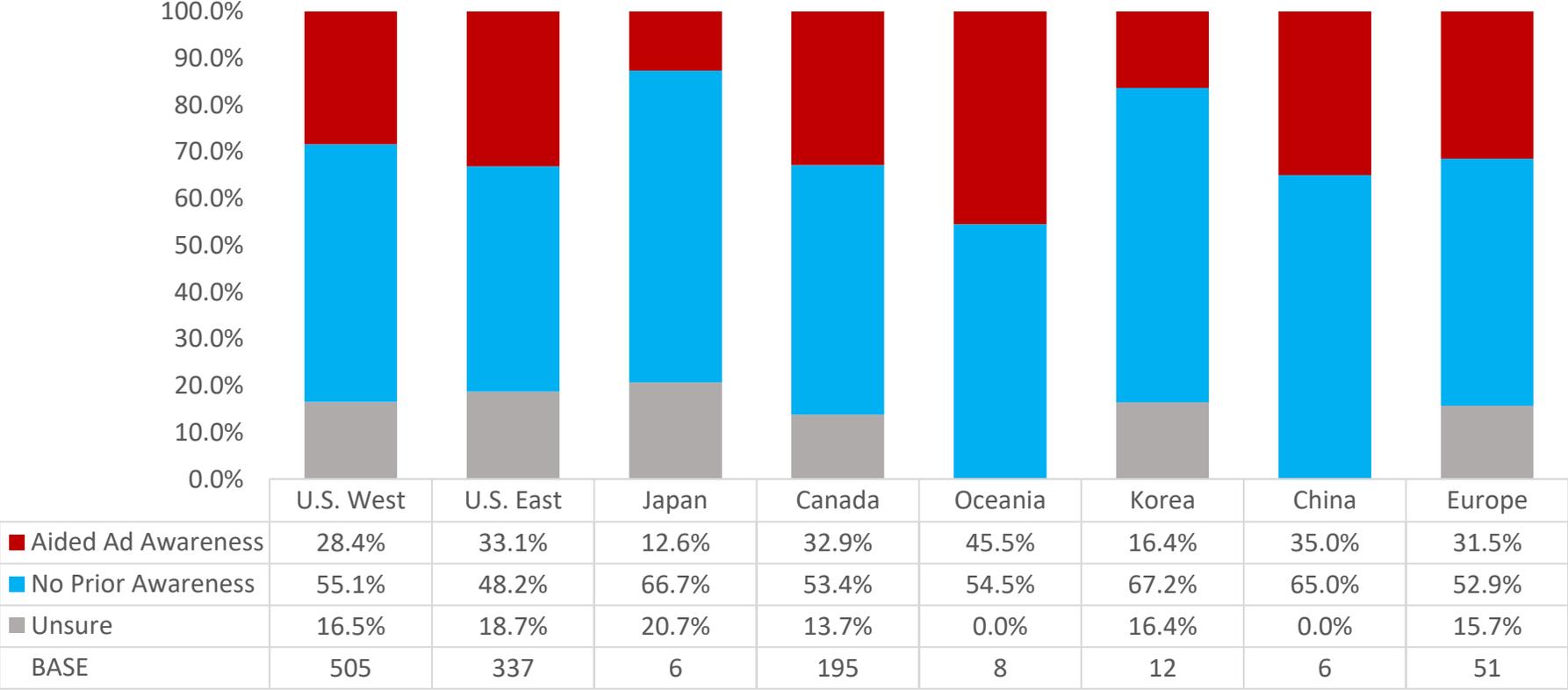
P= Preliminary Data

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.



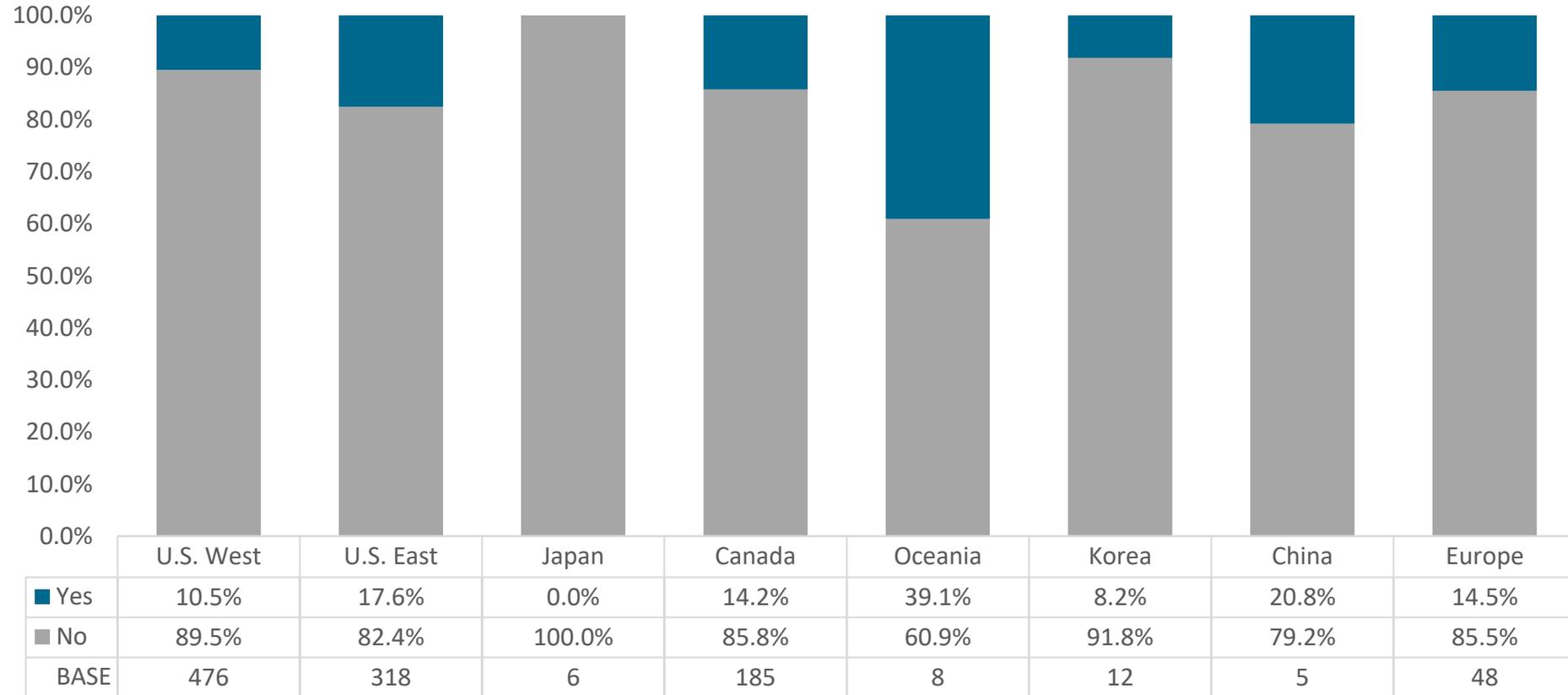
AIDED ADVERTISING AWARENESS - MAUI



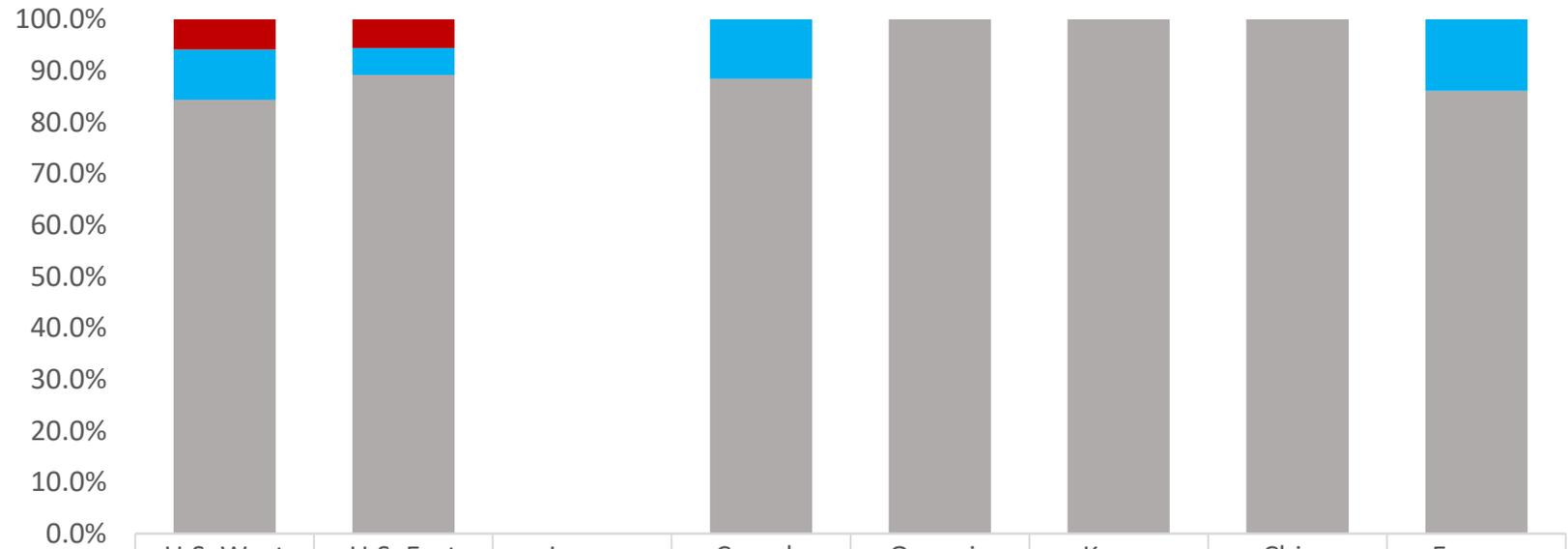
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	40.3%	50.7%	20.7%	43.3%	21.8%	65.0%	40.9%	55.0%
Hawaiian cultural experiences and Hawaiian cultural events	17.3%	19.6%	41.4%	16.6%	10.9%	17.5%	0.0%	23.4%
Outdoor or sporting activities and events	16.8%	14.3%	20.7%	15.5%	0.0%	0.0%	33.6%	23.6%
Social media posts and videos	16.6%	17.8%	0.0%	19.8%	28.2%	15.8%	33.6%	29.7%
Hawaiian music	12.0%	10.6%	0.0%	12.4%	0.0%	0.0%	8.2%	15.6%
Television programs or movies filmed in Hawai'i	8.7%	9.0%	12.6%	10.4%	10.9%	17.5%	8.2%	27.6%
Attend a festival or other event	2.7%	6.0%	20.7%	5.6%	0.0%	0.0%	0.0%	3.9%
BASE	505	336	6	194	8	6	12	51

WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE

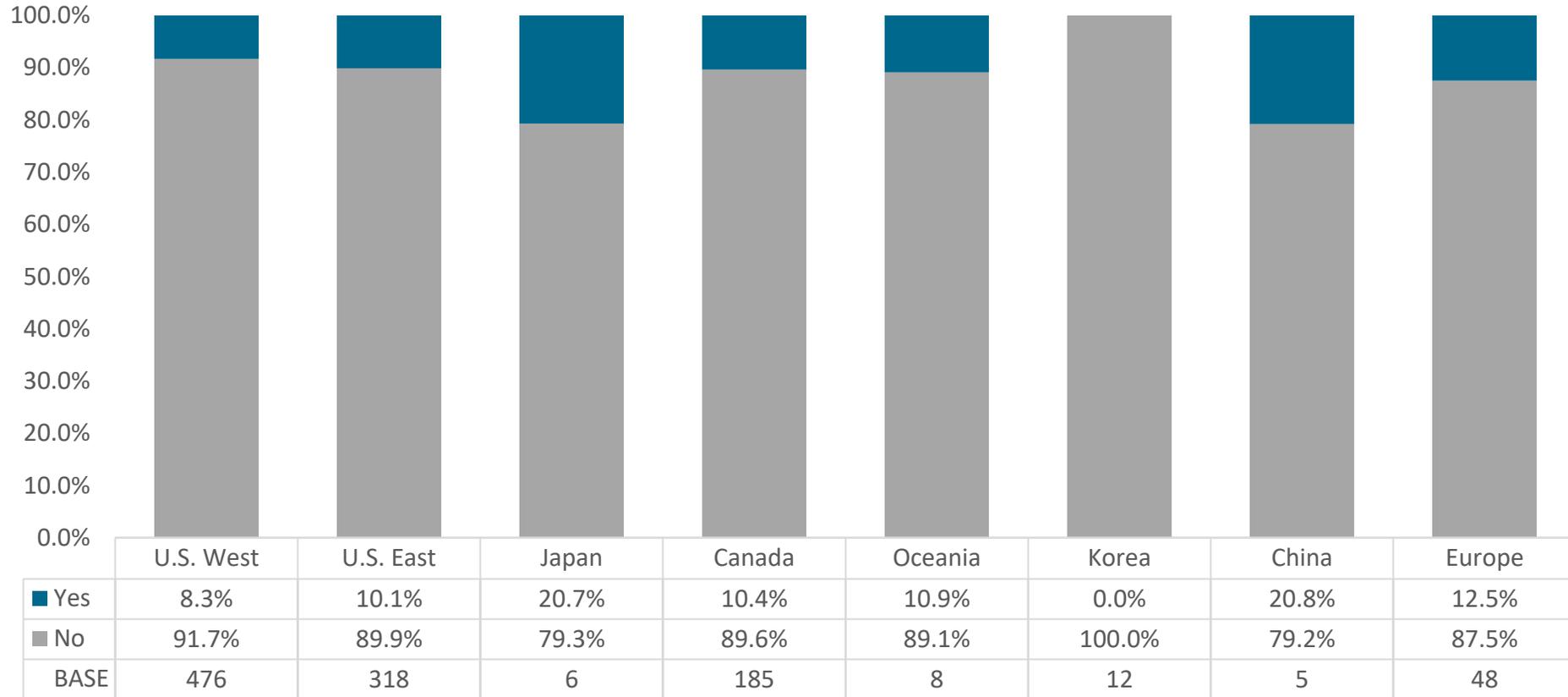


WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS

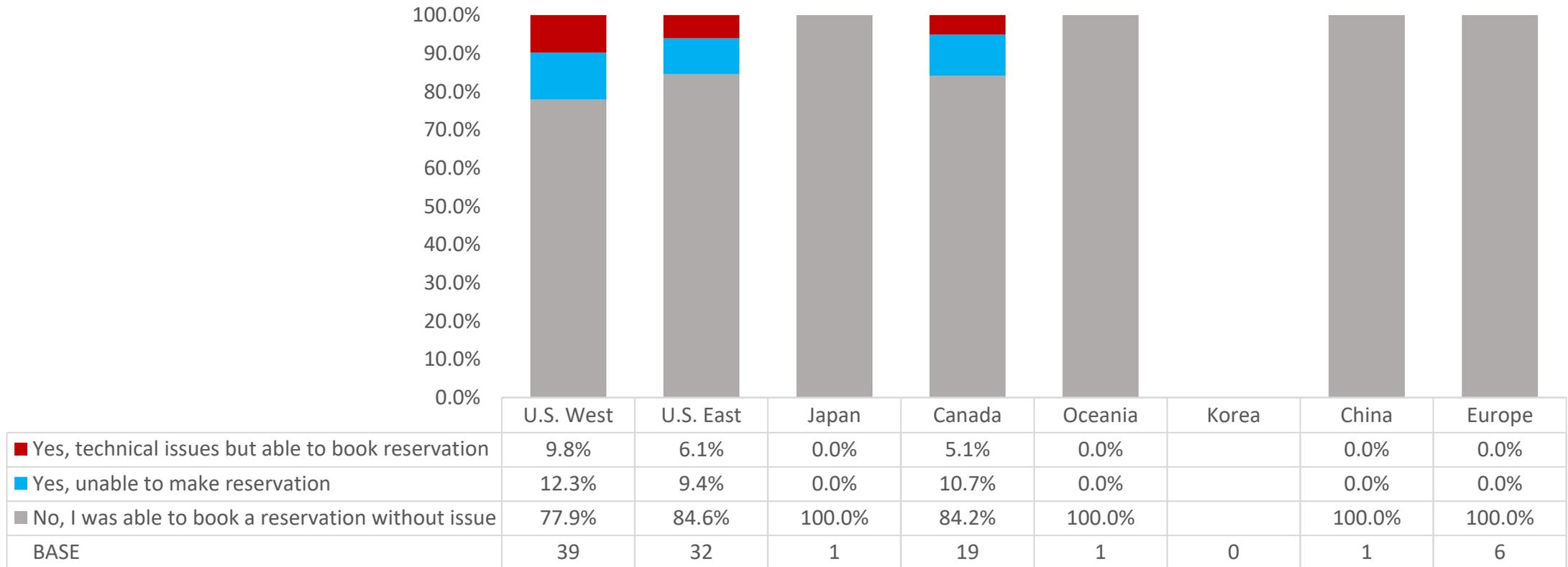


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Yes, technical issues but able to book reservation	5.9%	5.5%		0.0%	0.0%	0.0%	0.0%	0.0%
Yes, unable to make reservation	9.8%	5.3%		11.5%	0.0%	0.0%	0.0%	13.9%
No, I was able to book a reservation without issue	84.4%	89.2%		88.5%	100.0%	100.0%	100.0%	86.1%
BASE	48	55	0	26	3	1	1	7

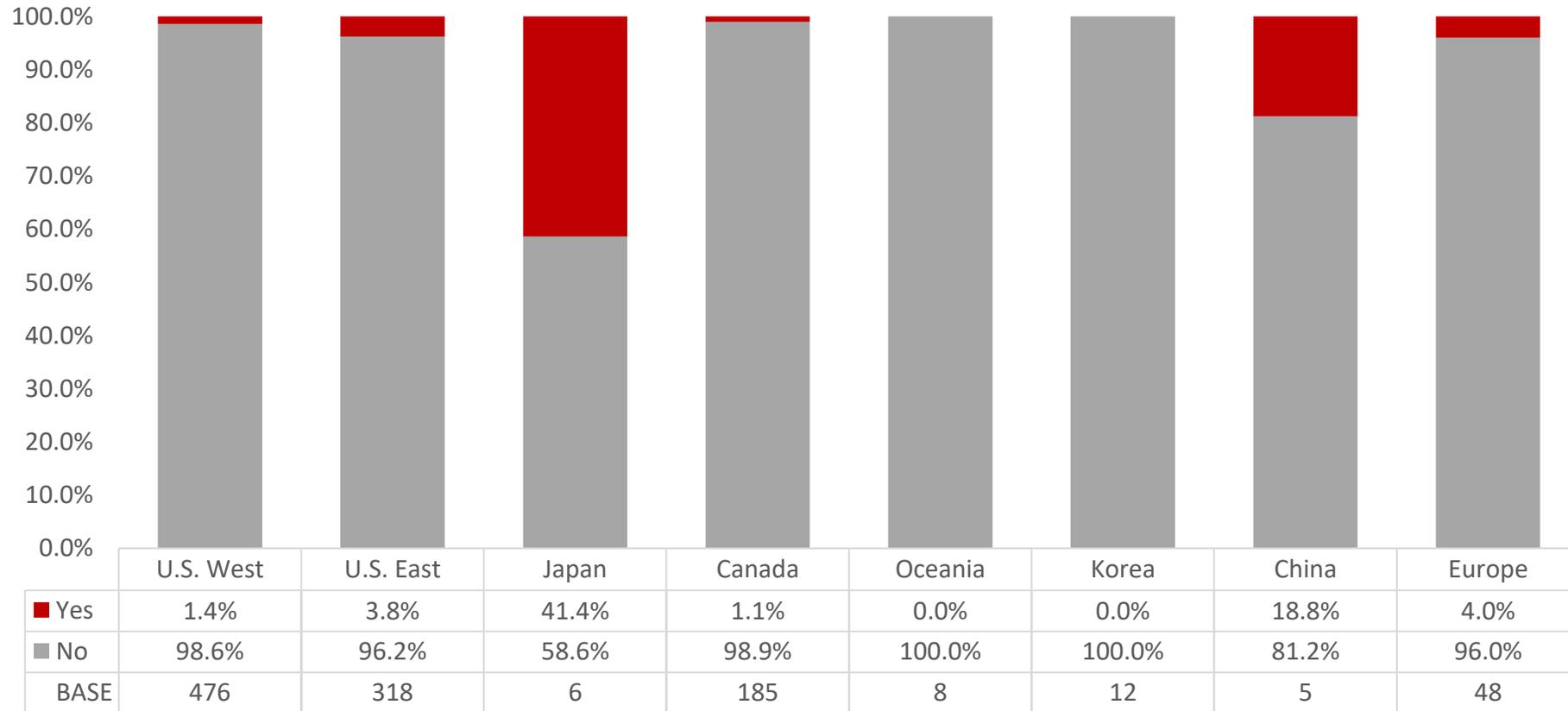
ʻĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



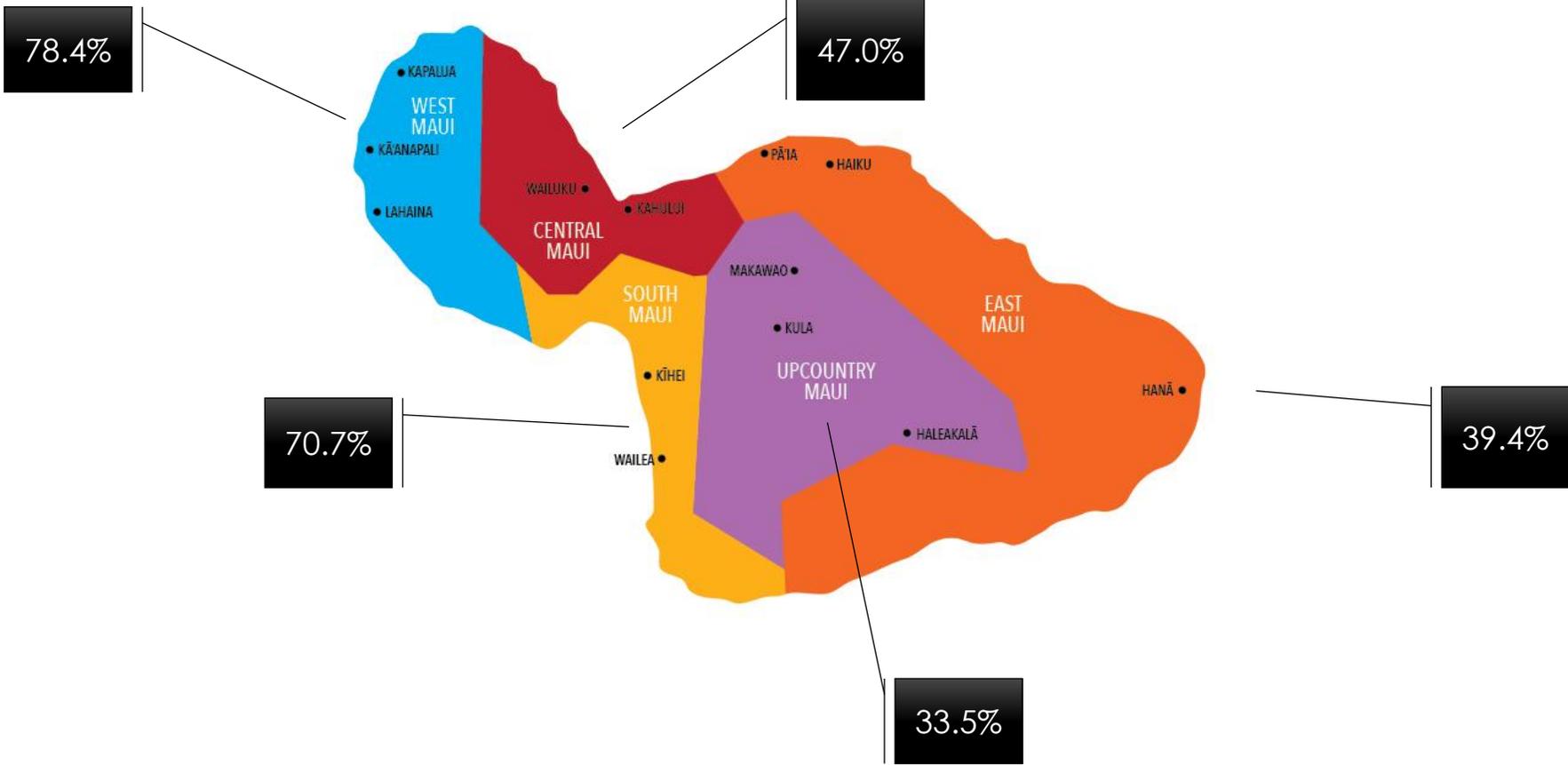
VISITED MAUI FOR SPECIFIC EVENT



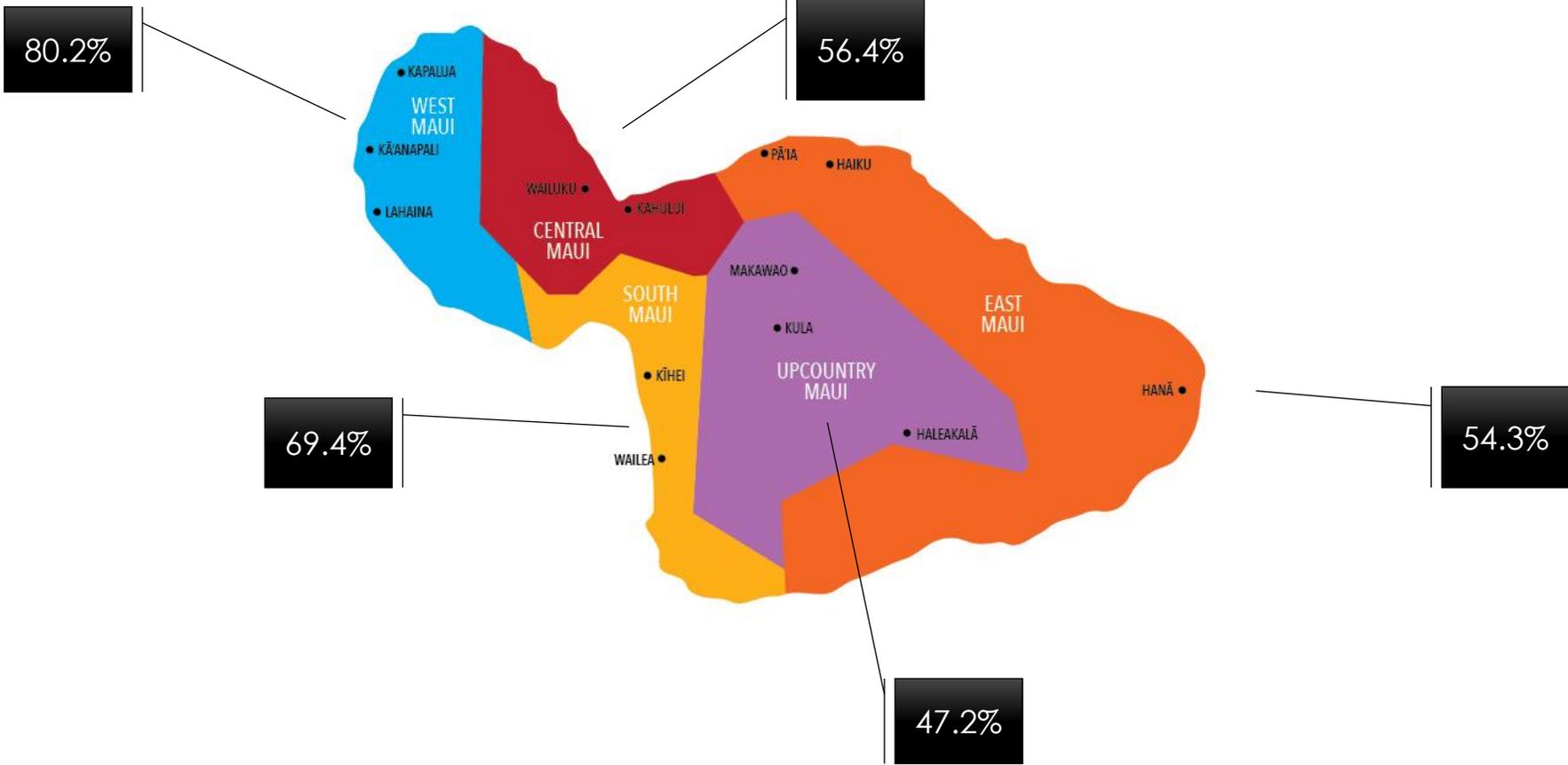
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Maui Marathon	28.6%	40.3%	0.0%	0.0%	-	-	0.0%	0.0%
Convention/Conference/ Retreat/Seminar/Meeting/ Workshop/Training/Work event	28.6%	8.7%	0.0%	0.0%	-	-	0.0%	50.0%
Other sporting event	0.0%	16.8%	0.0%	100.0%	-	-	0.0%	0.0%
Sentry Tournament of Golf Champions	14.3%	0.0%	50.0%	0.0%	-	-	0.0%	0.0%
Hawaii Food and Wine Festival	0.0%	8.7%	50.0%	0.0%	-	-	0.0%	0.0%
Other Festival/concert	14.3%	8.7%	0.0%	0.0%	-	-	0.0%	50.0%
Maui Invitational	14.3%	0.0%	0.0%	0.0%	-	-	0.0%	0.0%
Wedding/Honeymoon/ Anniversary/Birthday/Funeral/Gra duation	0.0%	8.7%	0.0%	0.0%	-	-	0.0%	0.0%
Other (please specify festival/event name)	0.0%	8.1%	0.0%	0.0%	-	-	0.0%	0.0%
Maui Film Festival	0.0%	0.0%	0.0%	0.0%	-	-	100.0%	0.0%
BASE	7	12	2	2	0	0	1	2

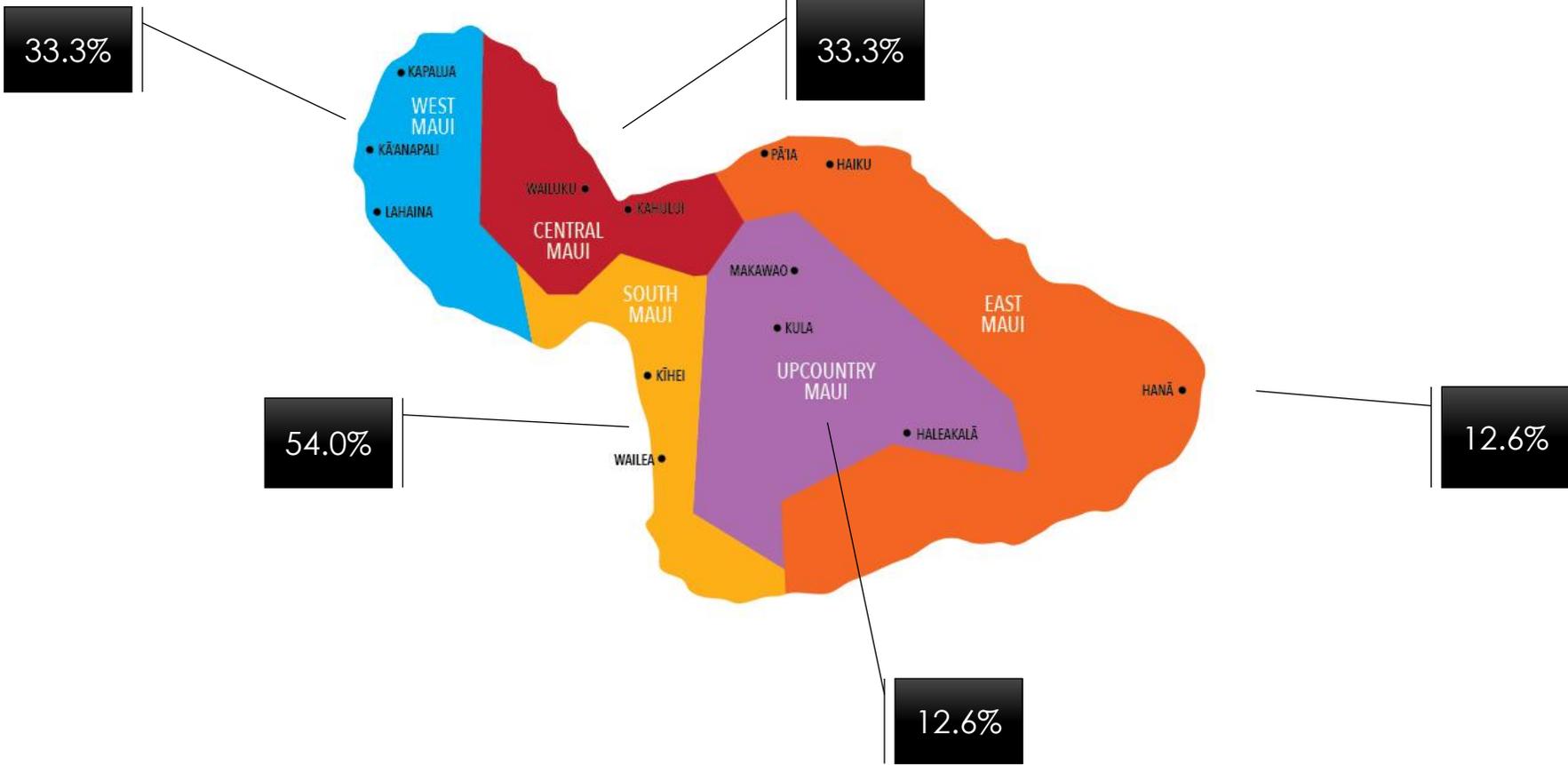
AREAS VISITED MAUI U.S. WEST



AREAS VISITED MAUI U.S. EAST



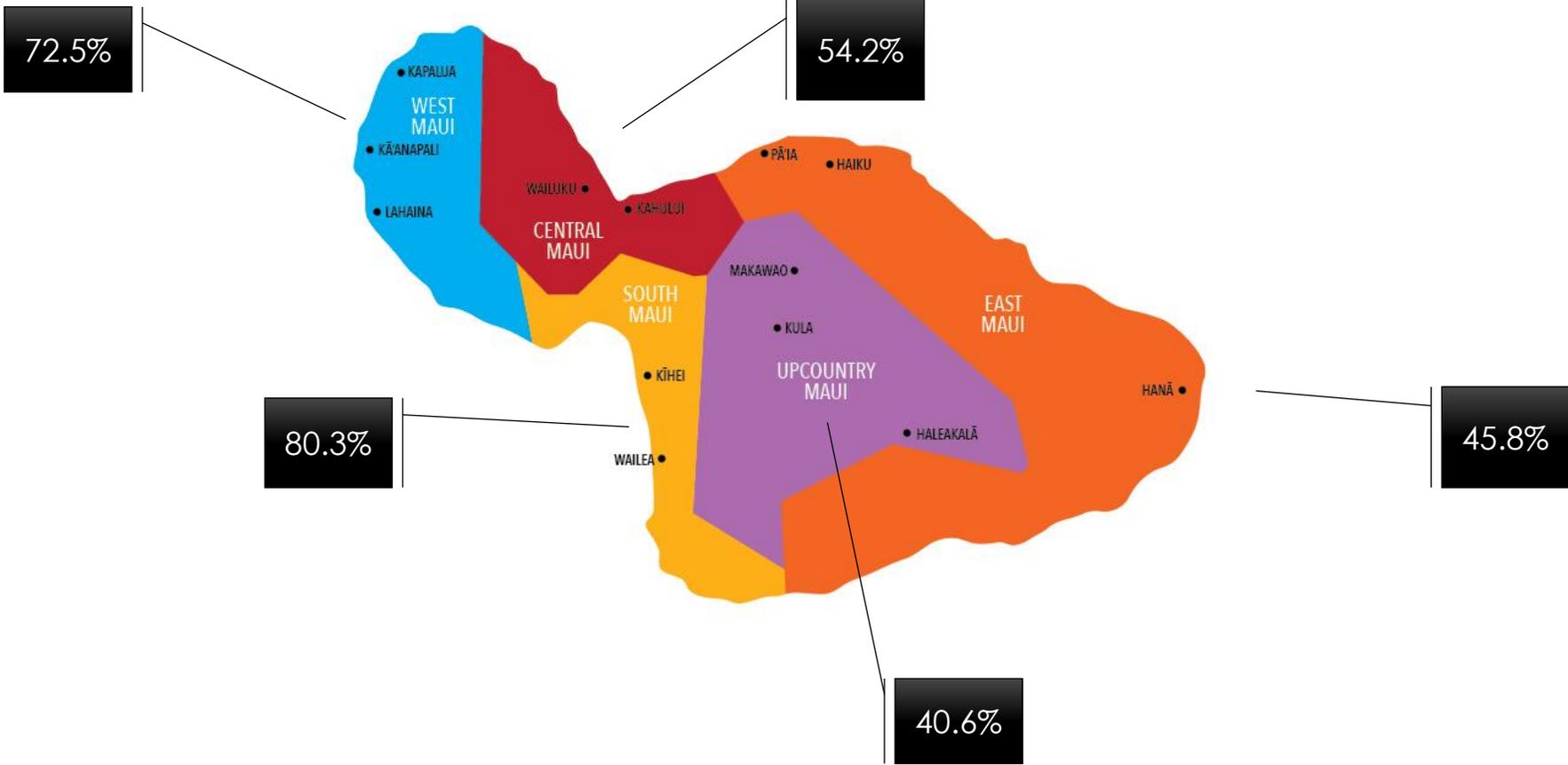
AREAS VISITED MAUI JAPAN



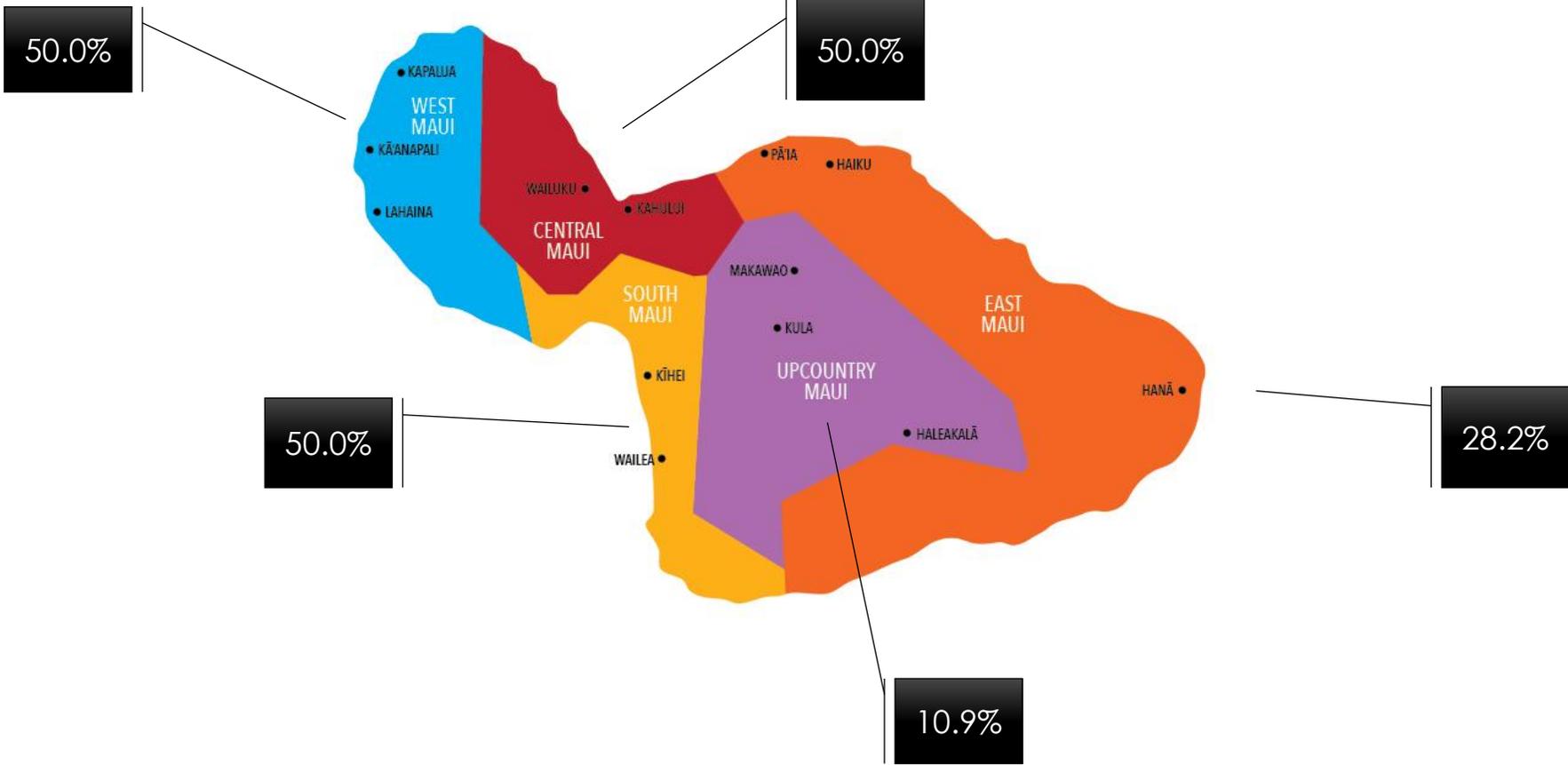
145 Q. Which of the following areas did you visit during your stay on Maui?



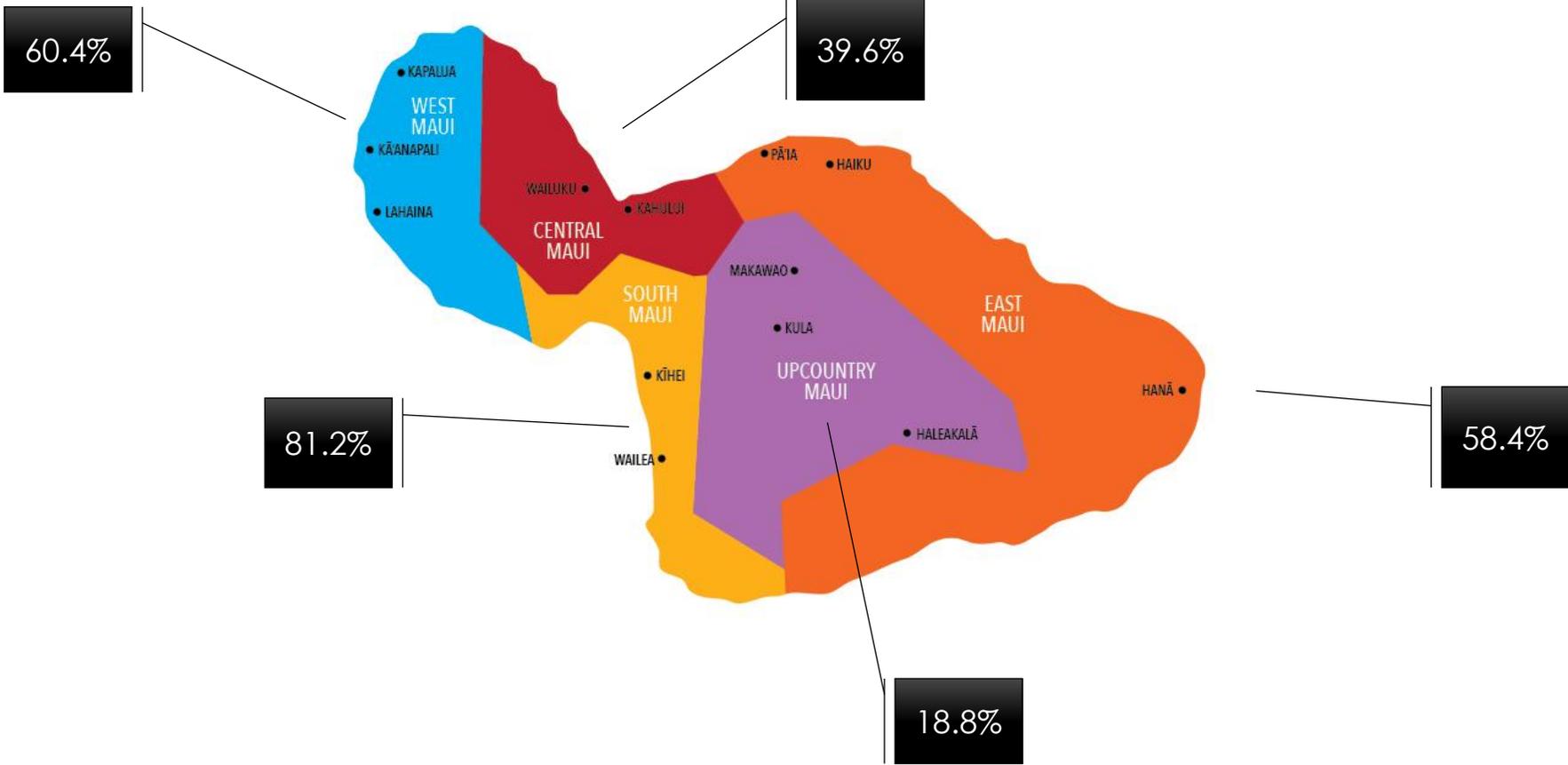
AREAS VISITED MAUI CANADA



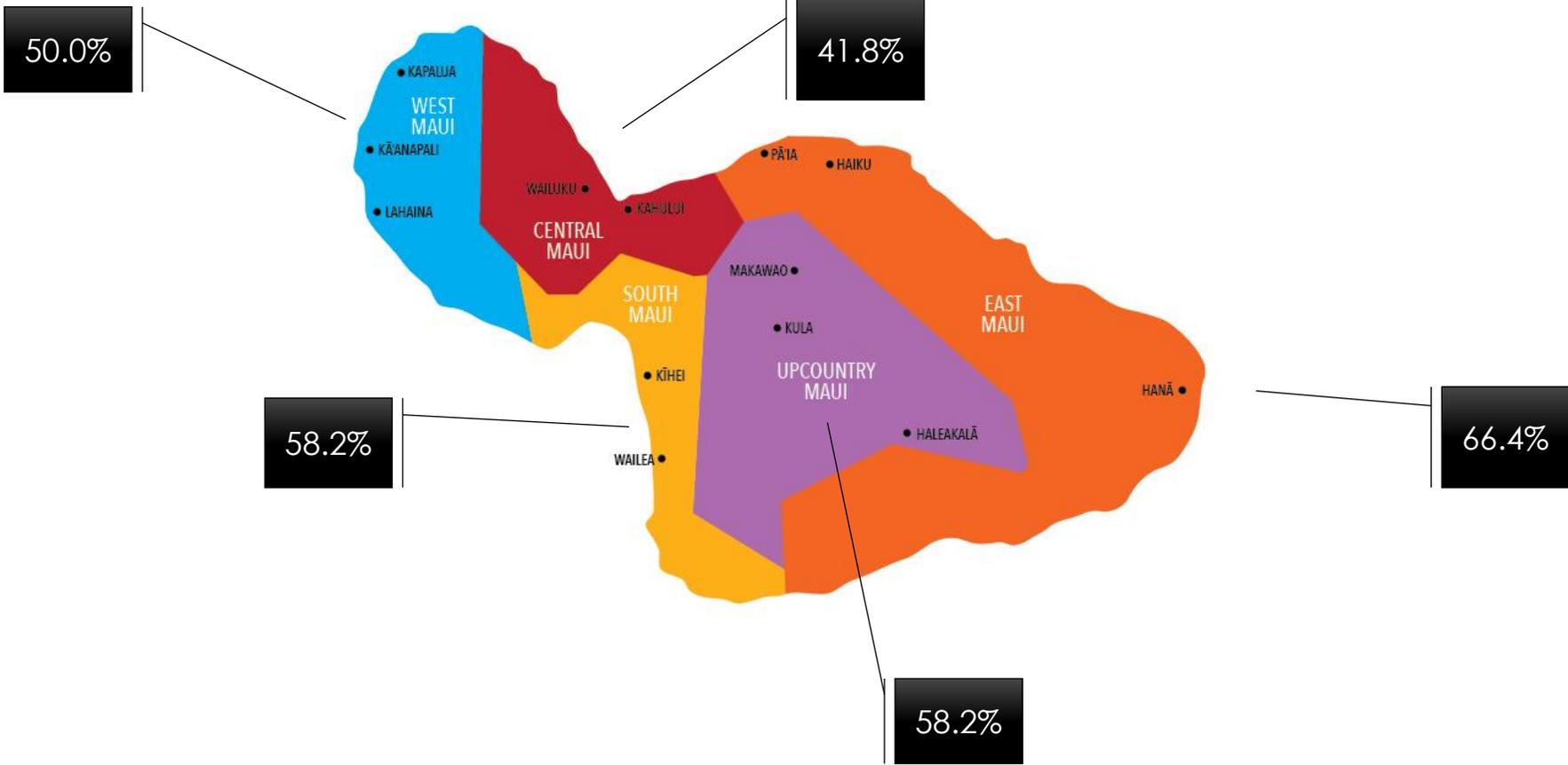
AREAS VISITED MAUI OCEANIA



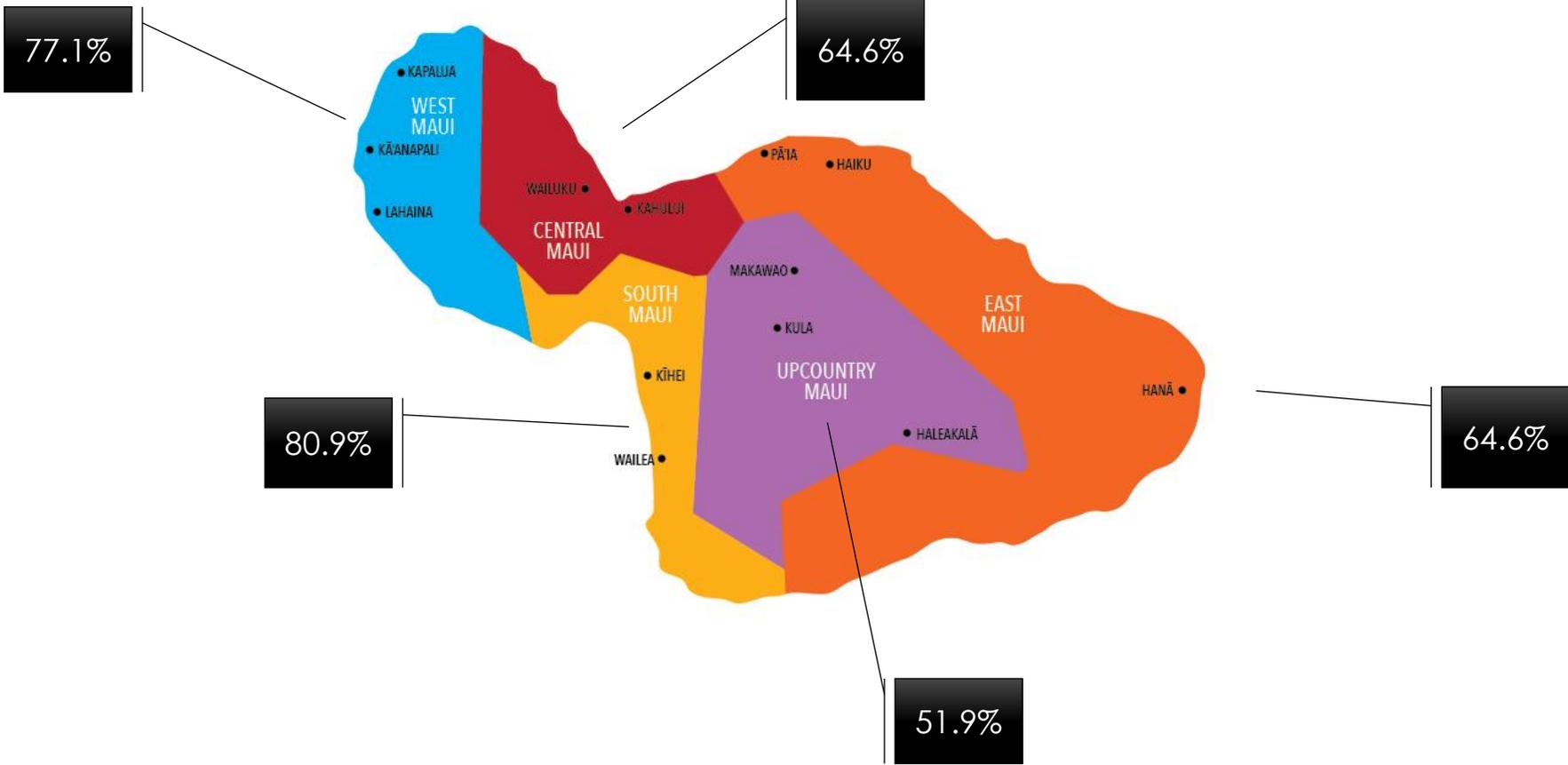
AREAS VISITED MAUI CHINA



AREAS VISITED MAUI KOREA



AREAS VISITED MAUI EUROPE



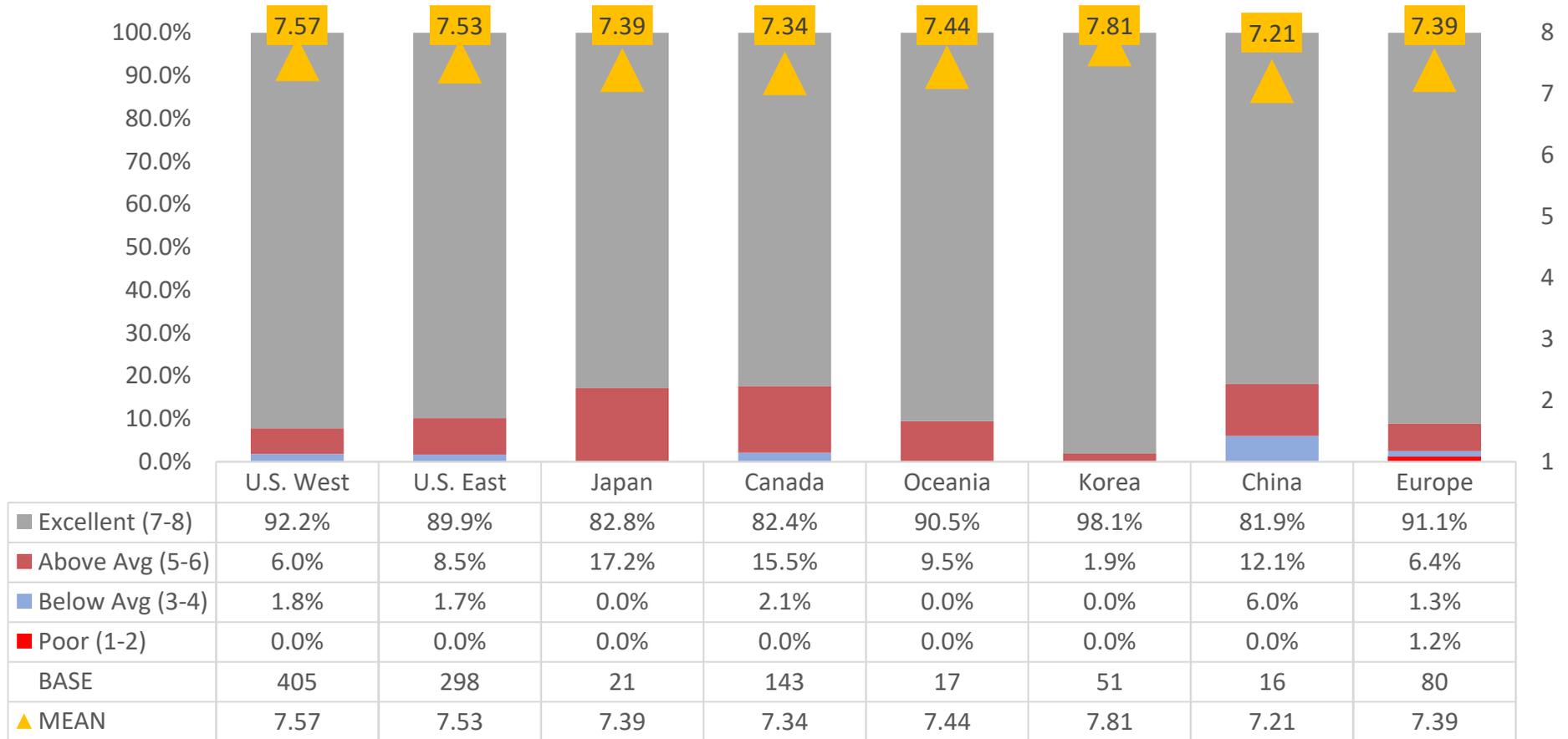
150 Q. Which of the following areas did you visit during your stay on Maui?



Section 10 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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



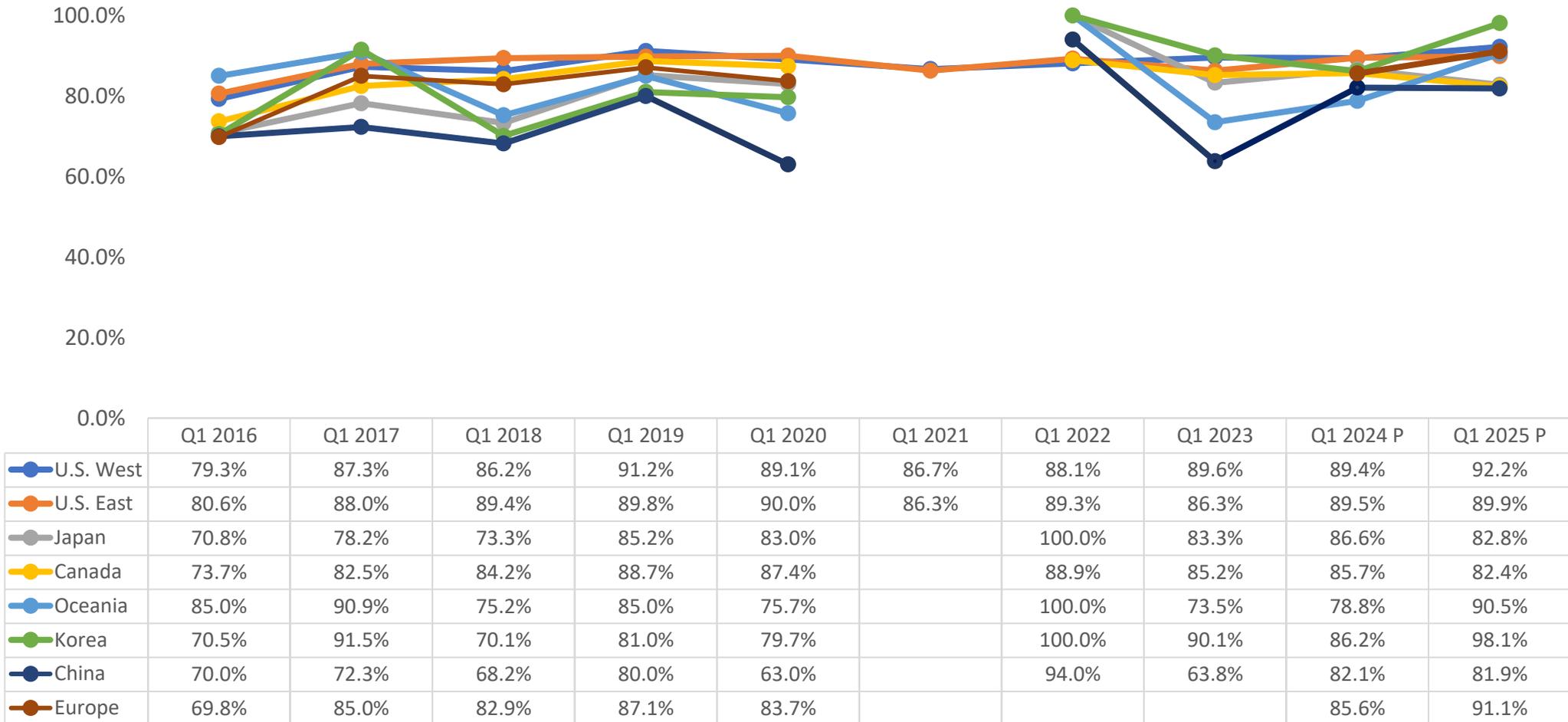
SATISFACTION - ISLAND OF HAWAI'I

- ***Trips to Hawai'i:*** Repeat visitors from **U.S. West** give higher satisfaction scores than first-time visitors from this market.
- ***Education:*** Those with a college degree from **U.S. East** are more satisfied with their stay than those without a college degree from this visitor market.

SATISFACTION - ISLAND OF HAWAI‘I

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

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



P= Preliminary Data

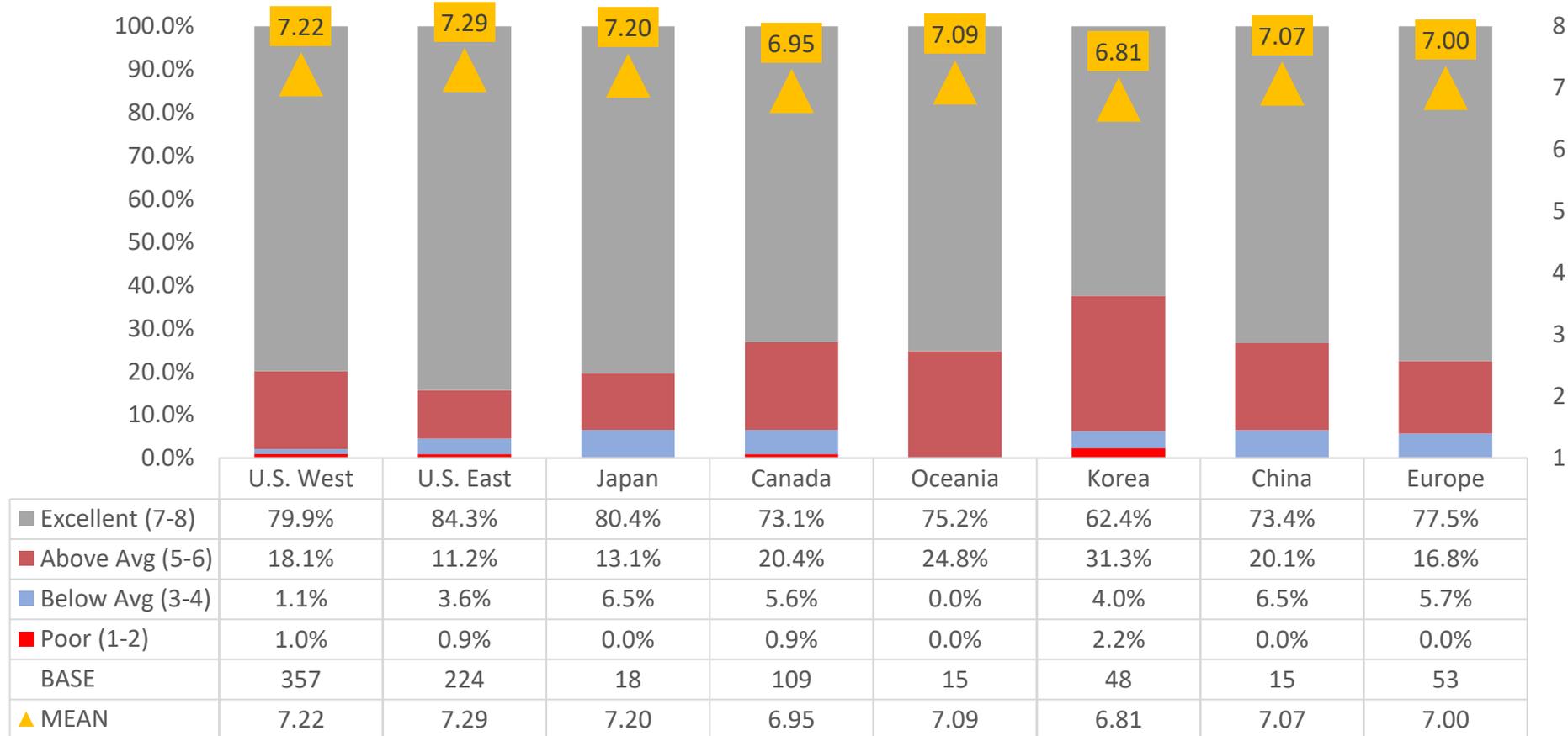
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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



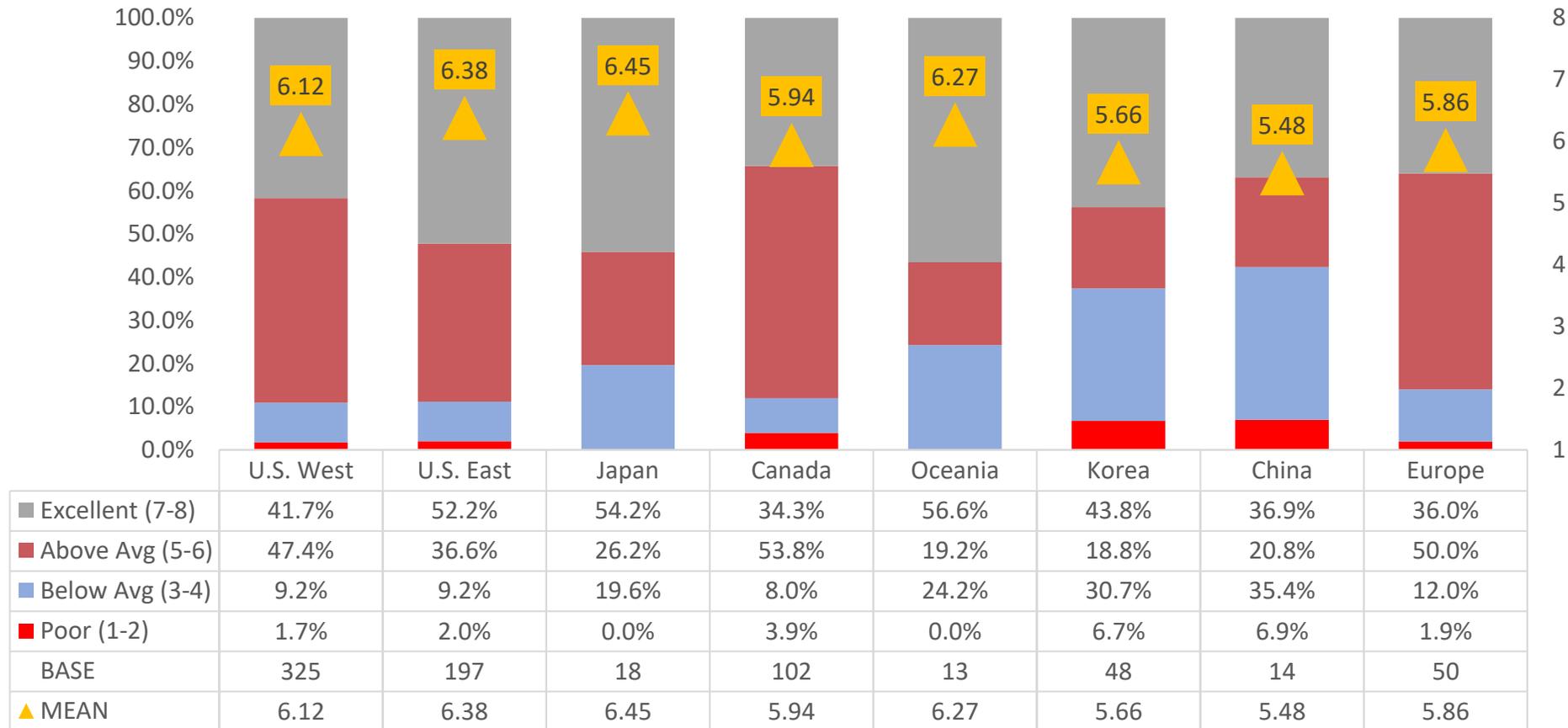
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



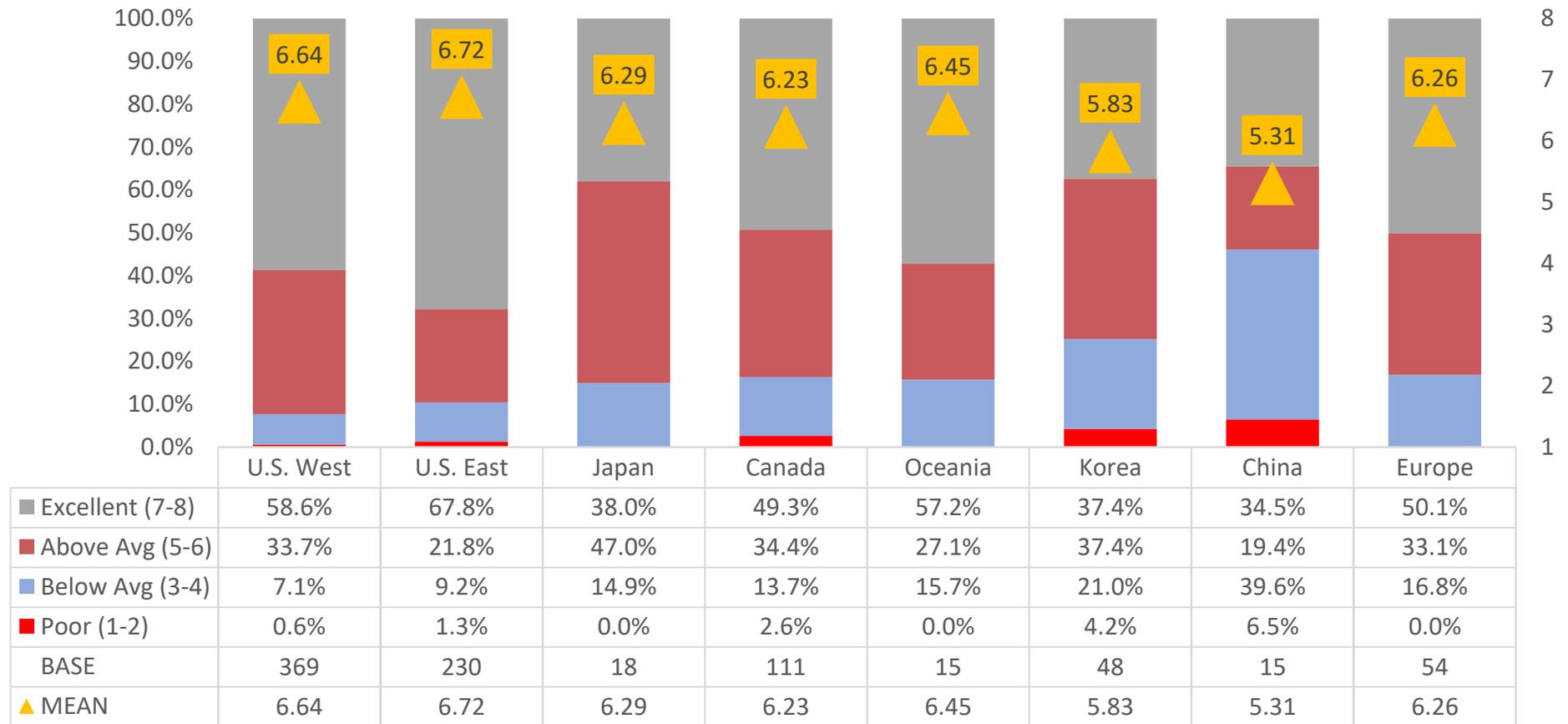
SHOPPING - ISLAND OF HAWAII

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



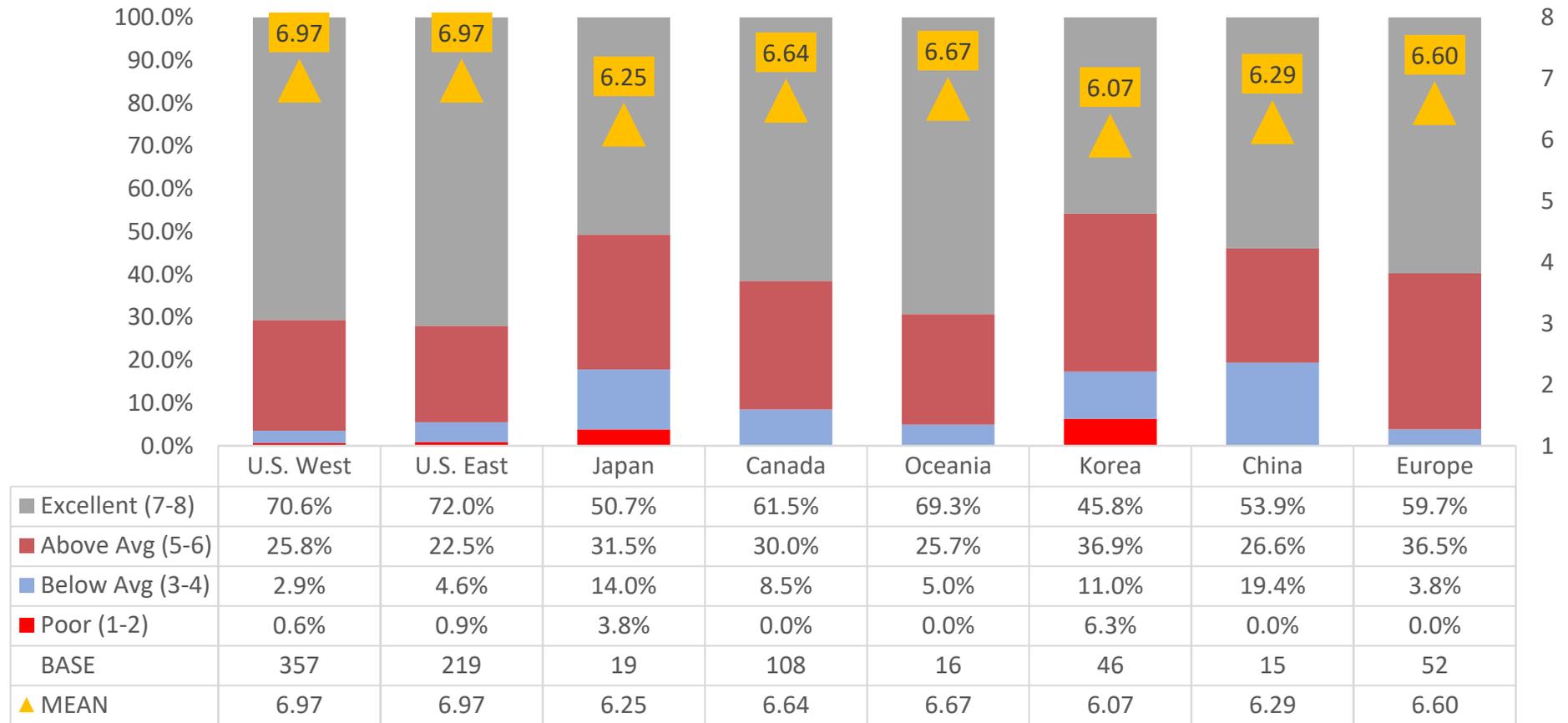
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



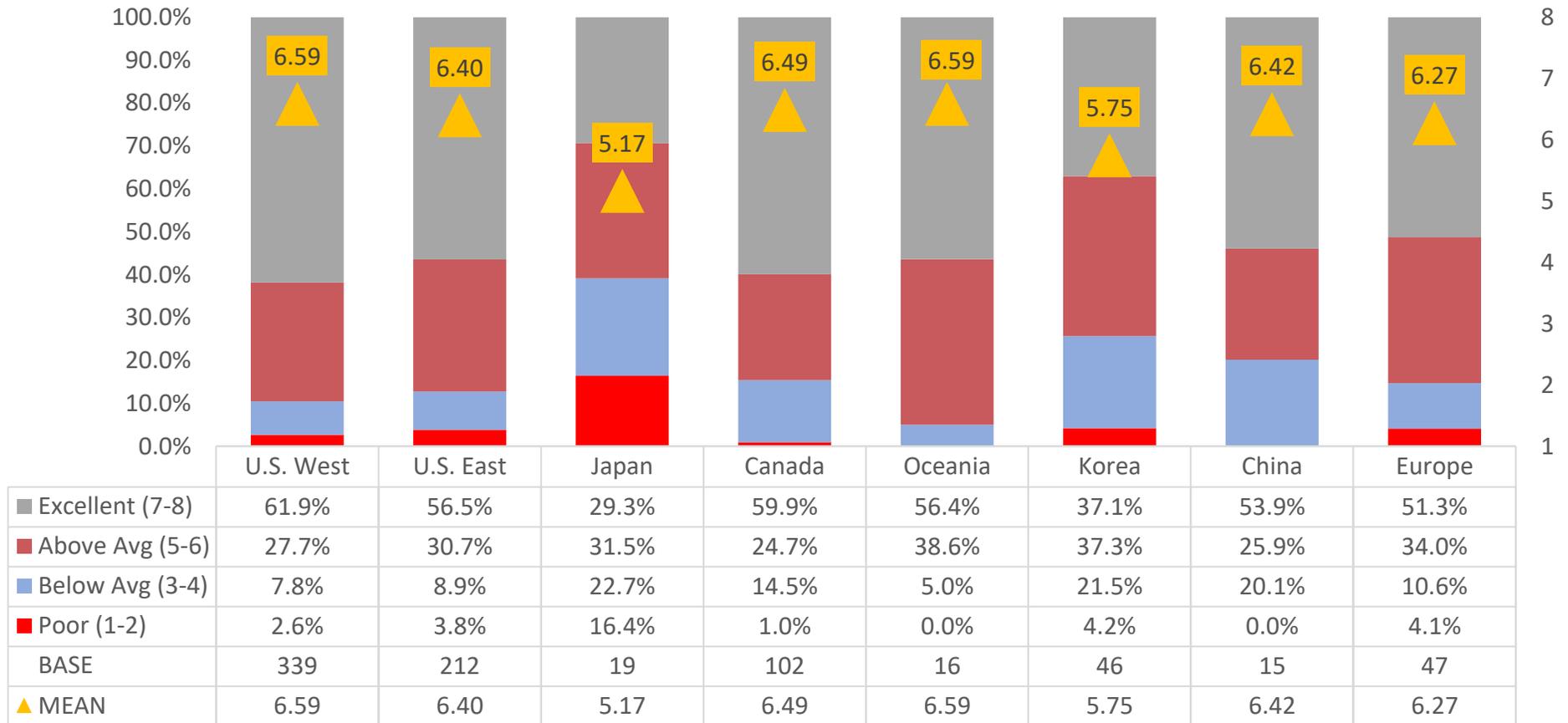
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



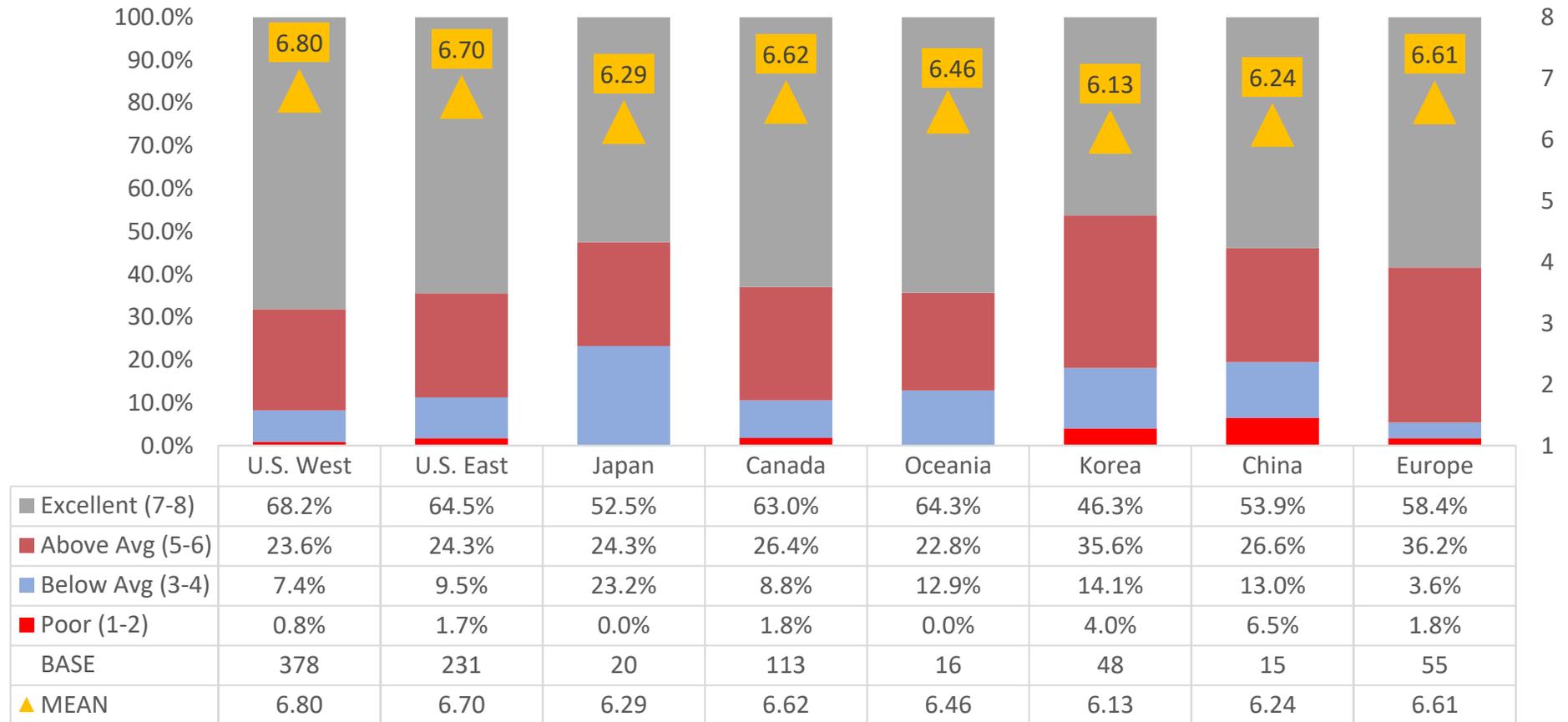
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



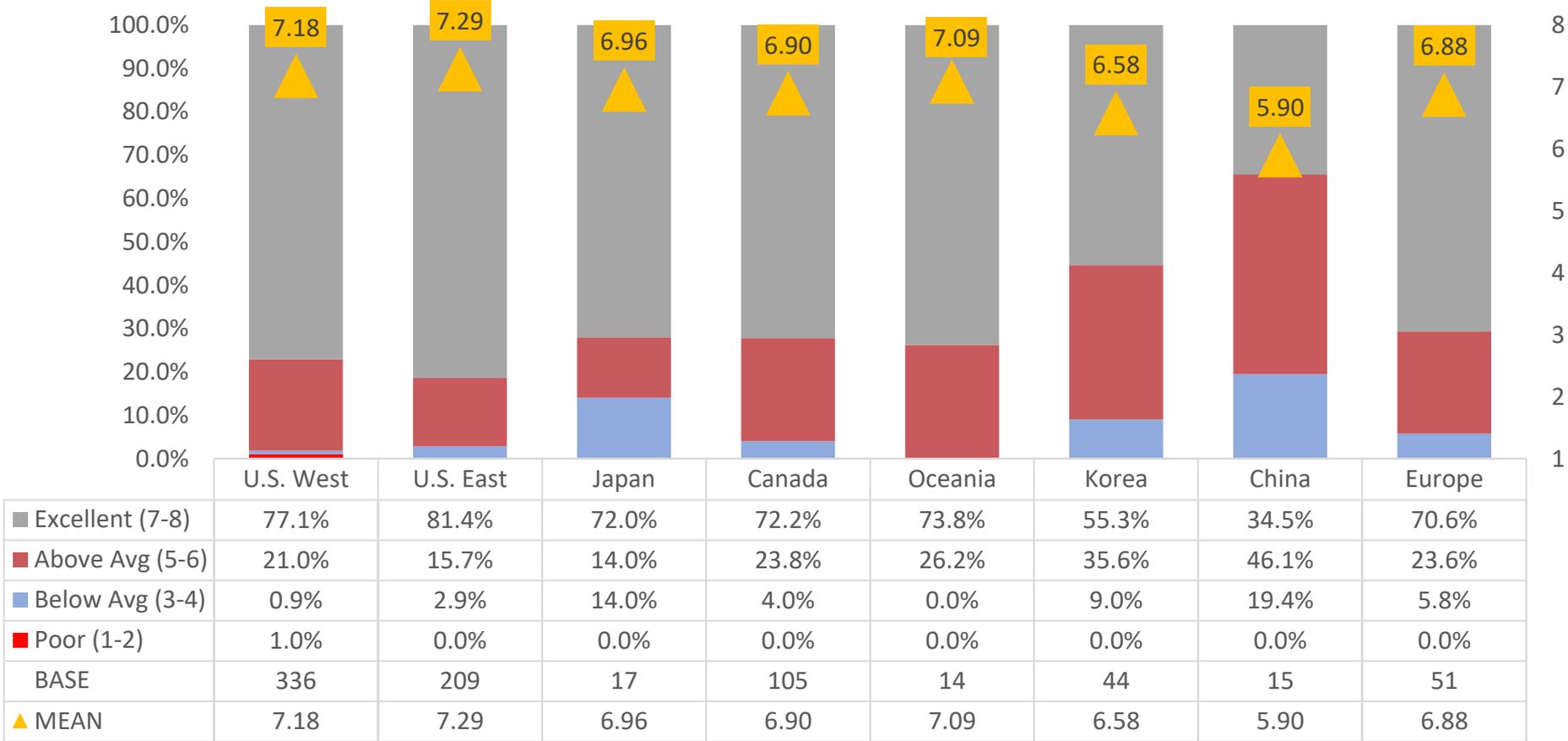
AIRPORT - ISLAND OF HAWAI'I

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



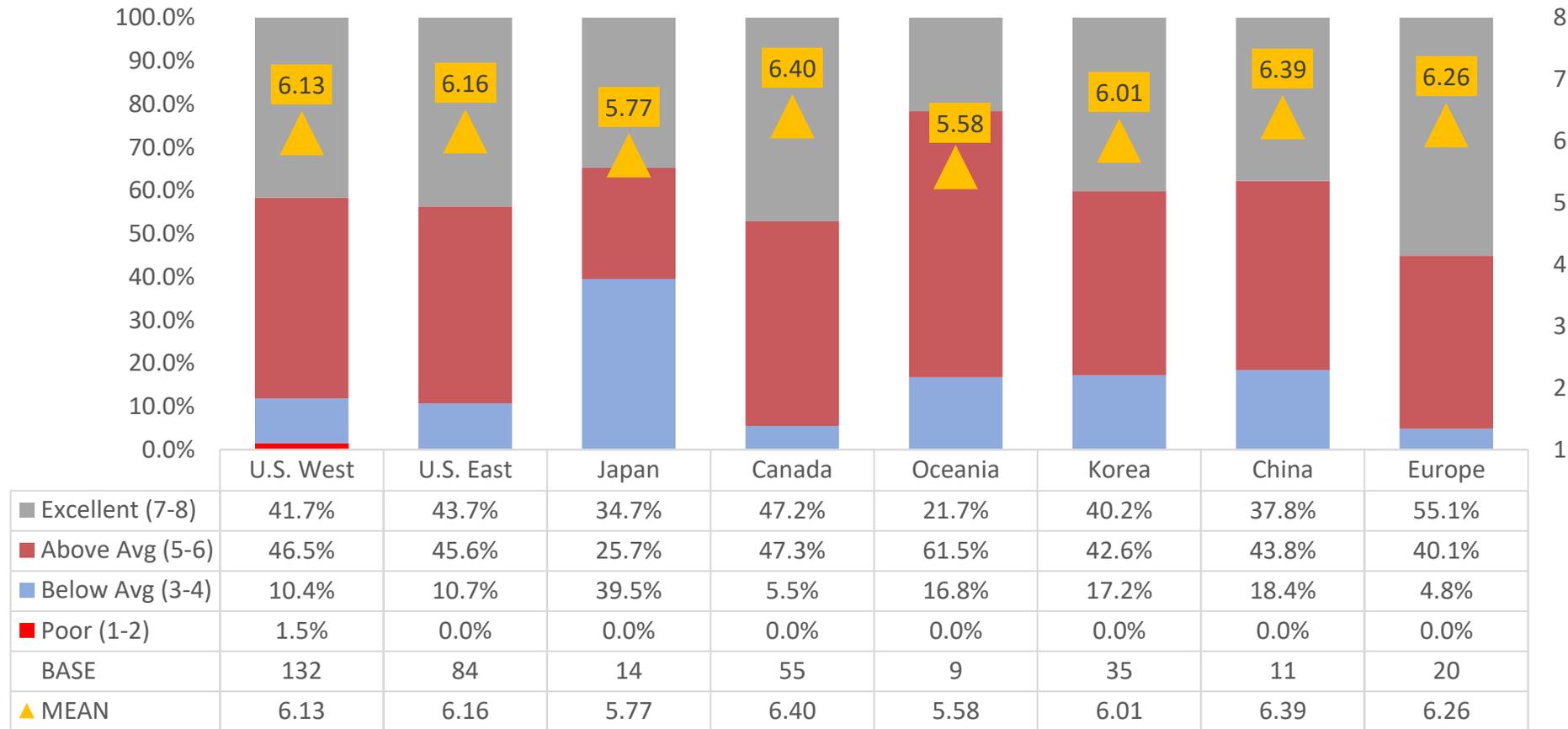
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



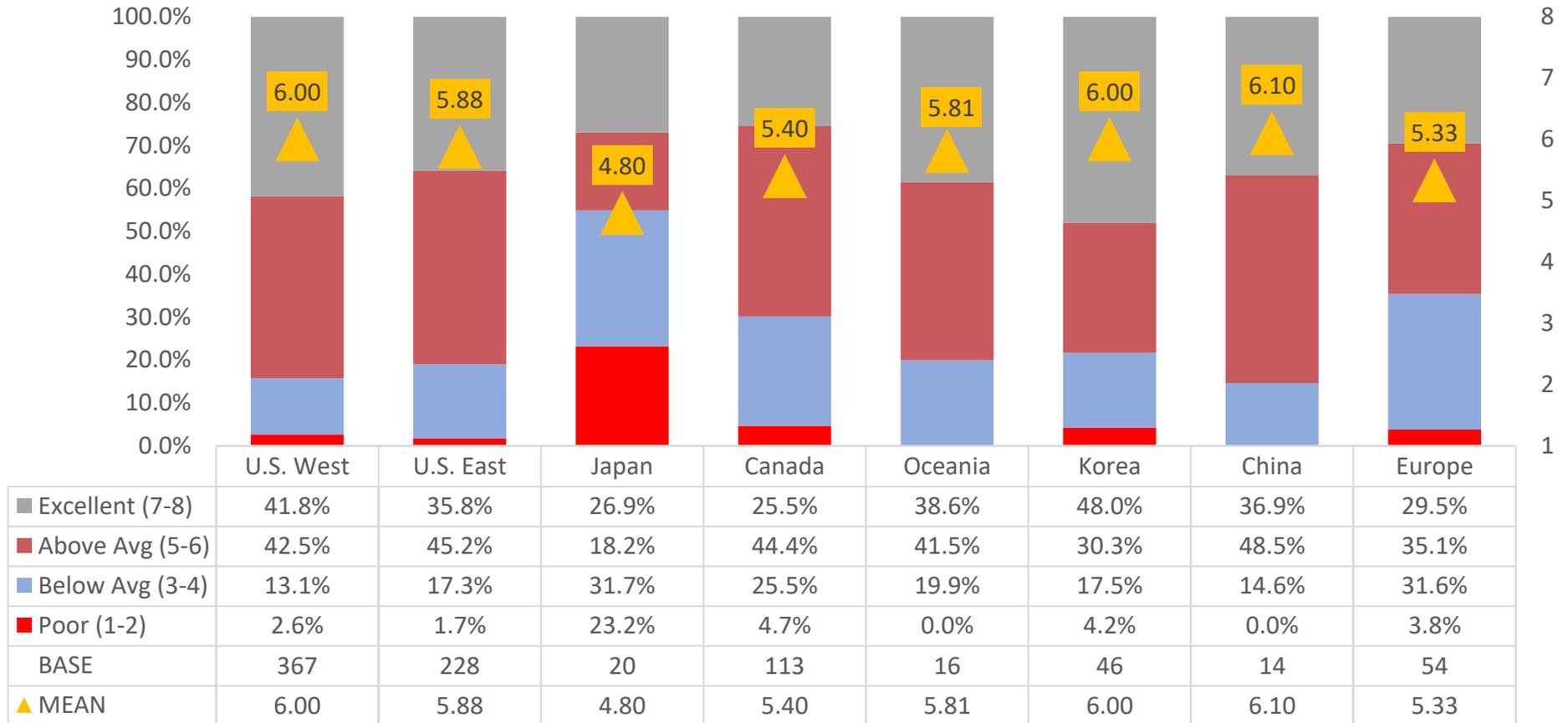
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



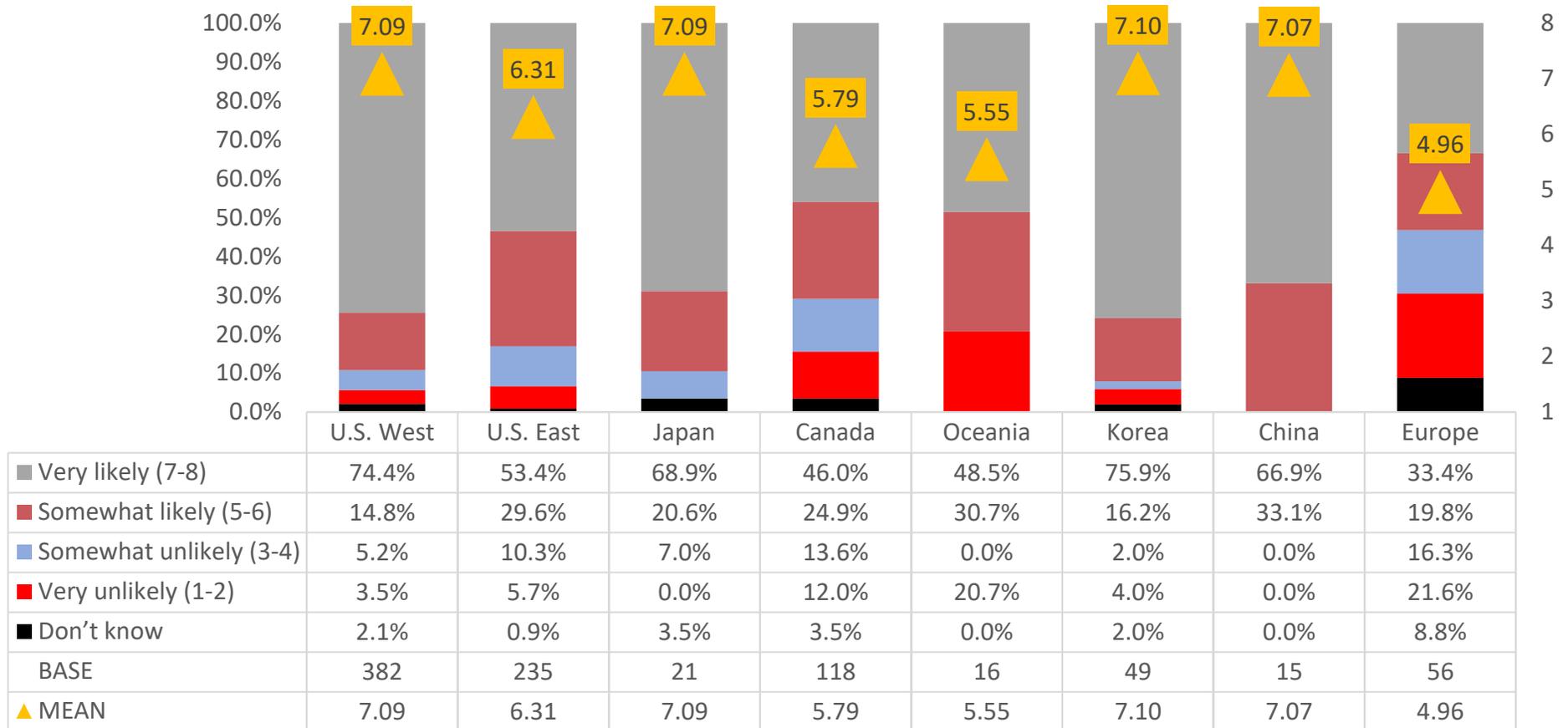
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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

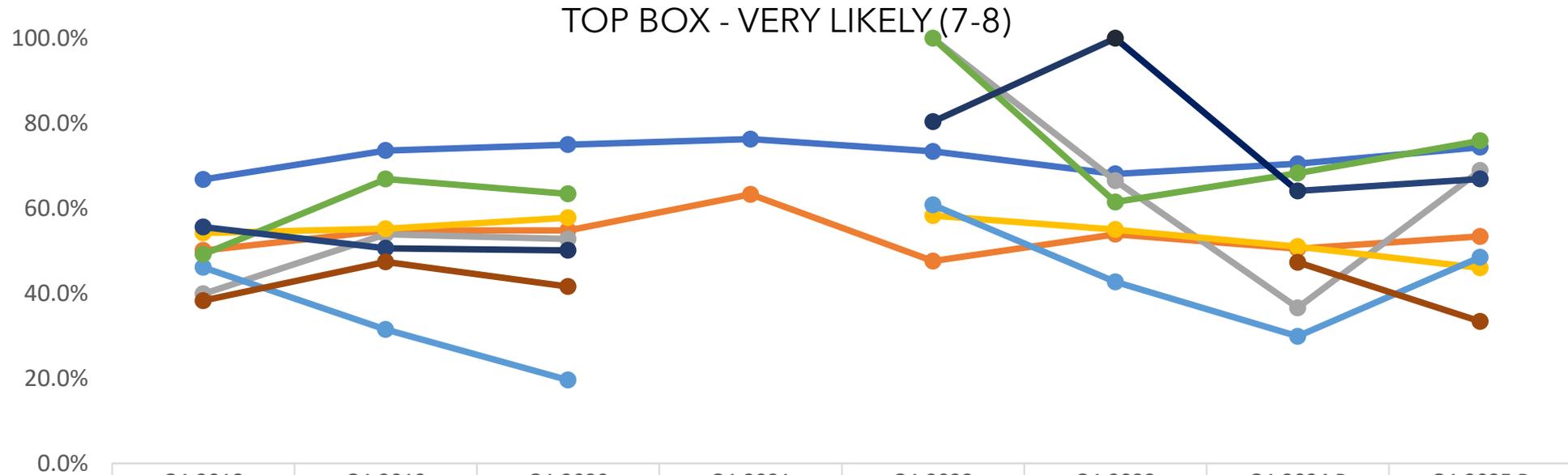


LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024 P	Q1 2025 P
U.S. West	66.8%	73.6%	75.0%	76.3%	73.4%	68.1%	70.5%	74.4%
U.S. East	50.1%	54.8%	54.8%	63.3%	47.6%	53.9%	50.5%	53.4%
Japan	39.9%	53.9%	52.8%		100.0%	66.5%	36.6%	68.9%
Canada	54.2%	55.2%	57.8%		58.3%	55.0%	51.0%	46.0%
Oceania	46.1%	31.5%	19.6%		60.8%	42.7%	29.9%	48.5%
Korea	49.2%	66.9%	63.4%		100.0%	61.5%	68.3%	75.9%
China	55.6%	50.6%	50.1%		80.4%	100.0%	64.1%	66.9%
Europe	38.3%	47.4%	41.6%				47.3%	33.4%

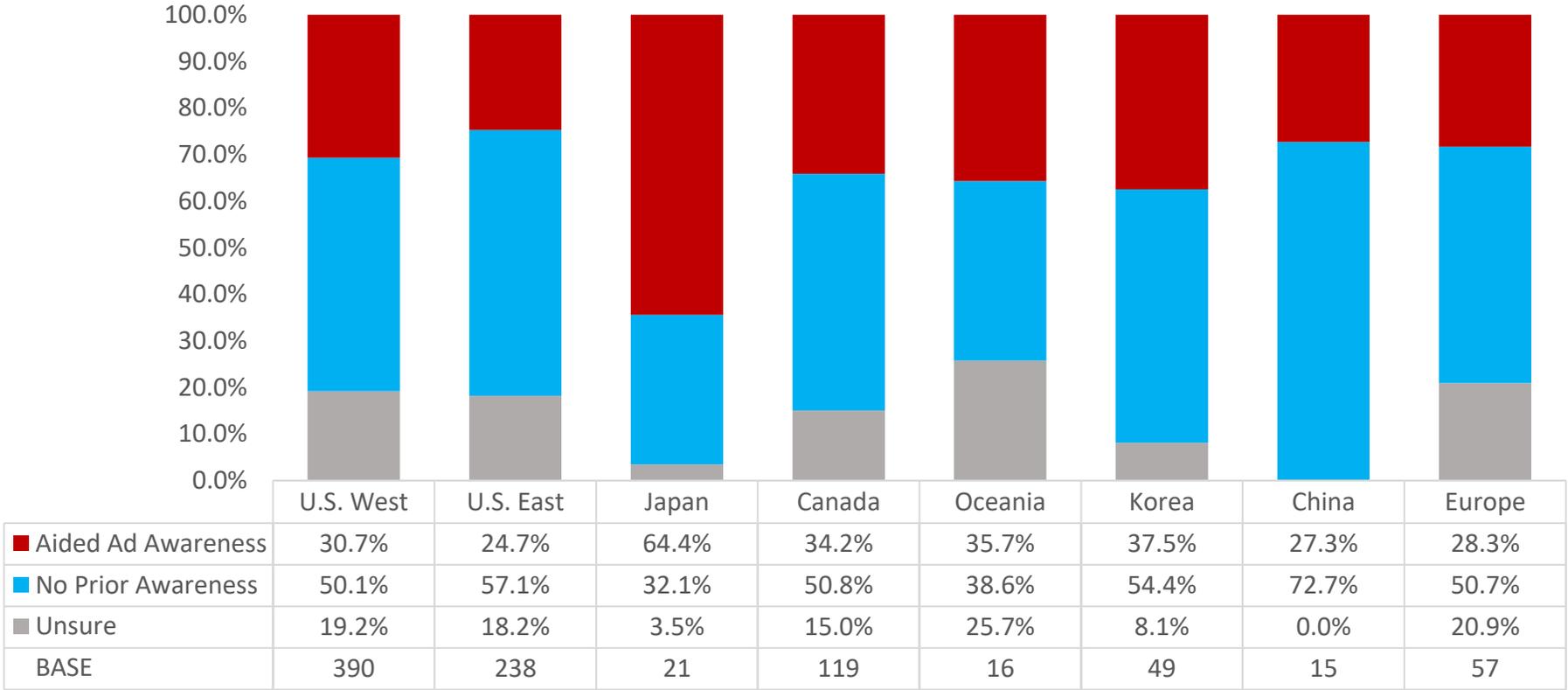
P= Preliminary Data

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.



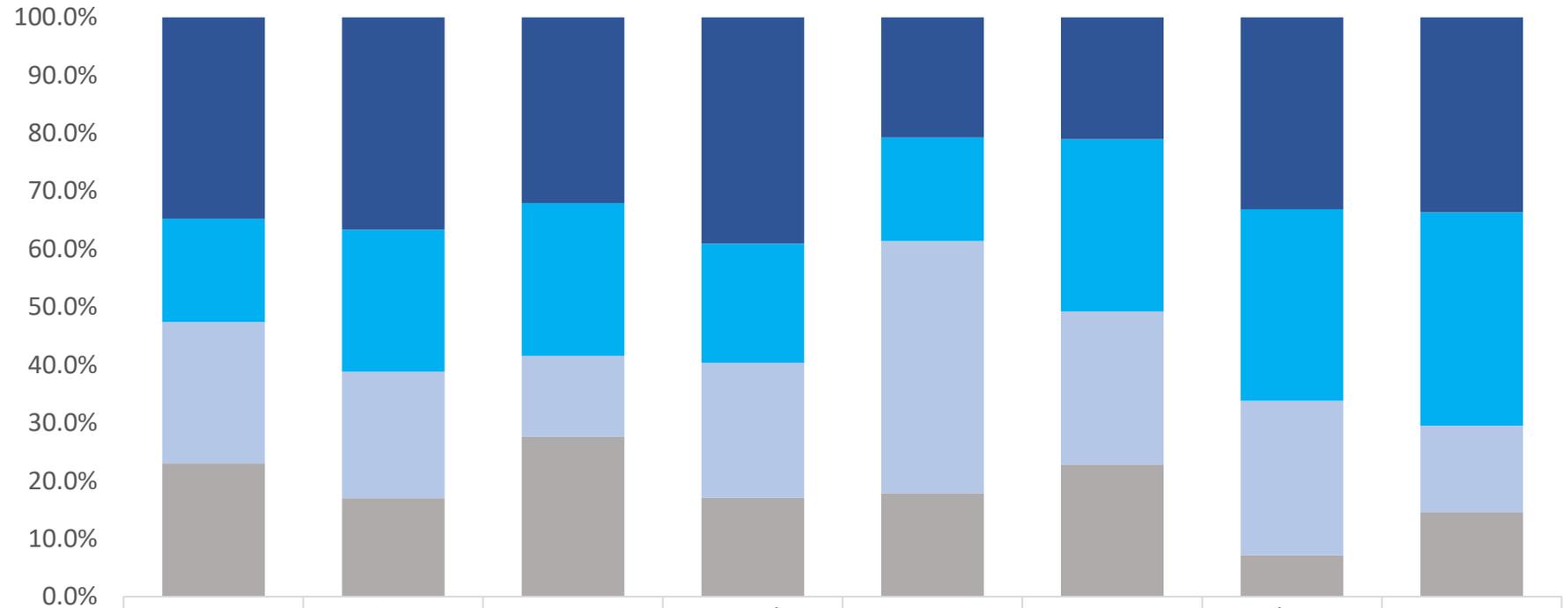
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

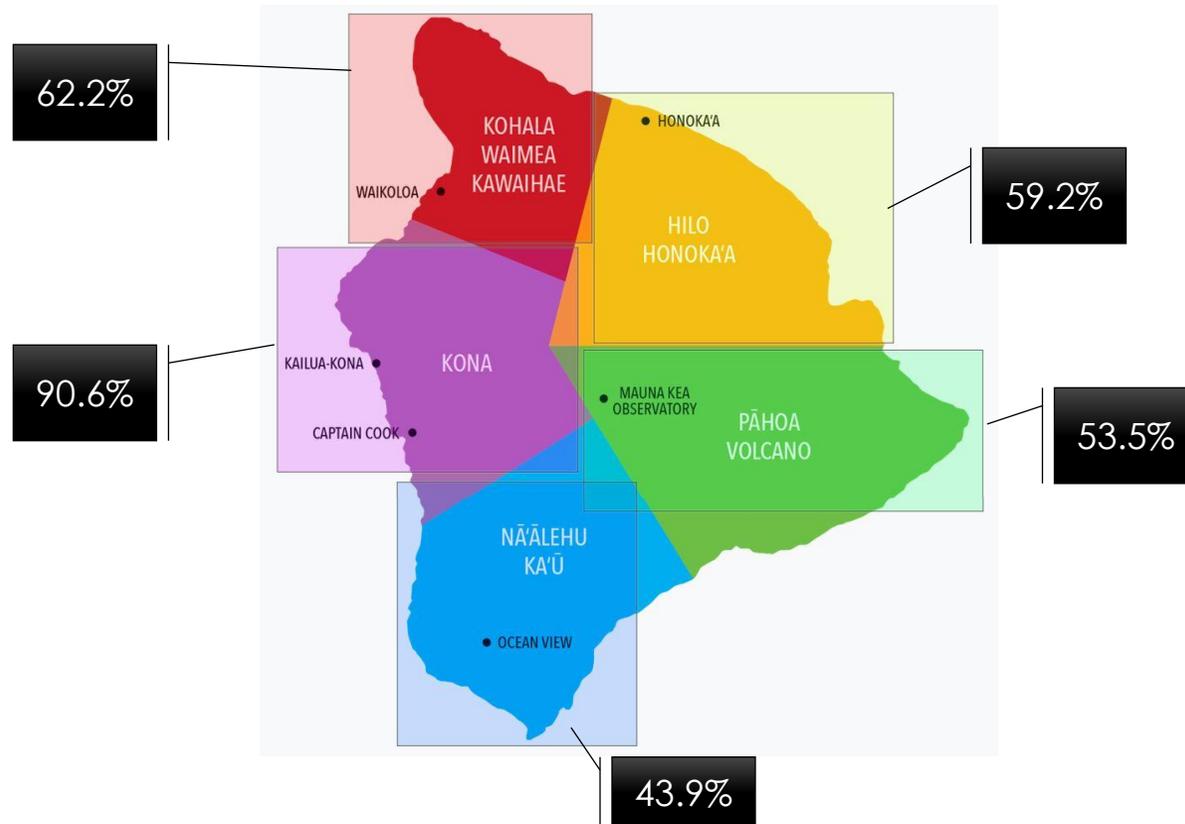
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	48.0%	59.0%	50.5%	50.0%	53.5%	73.4%	63.2%	61.7%
Outdoor or sporting activities and events	11.9%	14.8%	5.7%	17.8%	25.7%	13.0%	8.1%	10.6%
Social media posts and videos	16.9%	15.8%	26.4%	11.1%	35.7%	0.0%	22.2%	17.5%
Hawaiian cultural experience and Hawaiian cultural events	24.7%	28.3%	5.7%	21.2%	22.8%	20.1%	10.1%	15.6%
Television programs or movies filmed in Hawai'i	9.5%	12.8%	33.3%	18.0%	10.0%	6.5%	18.4%	24.8%
Hawaiian music	14.6%	13.3%	5.7%	15.8%	17.8%	0.0%	4.2%	14.2%
Attend a festival or other event	2.5%	3.8%	5.7%	3.4%	0.0%	0.0%	0.0%	3.5%
BASE	390	237	21	118	16	15	49	57

TRAVEL ON ISLAND OF HAWAI'I

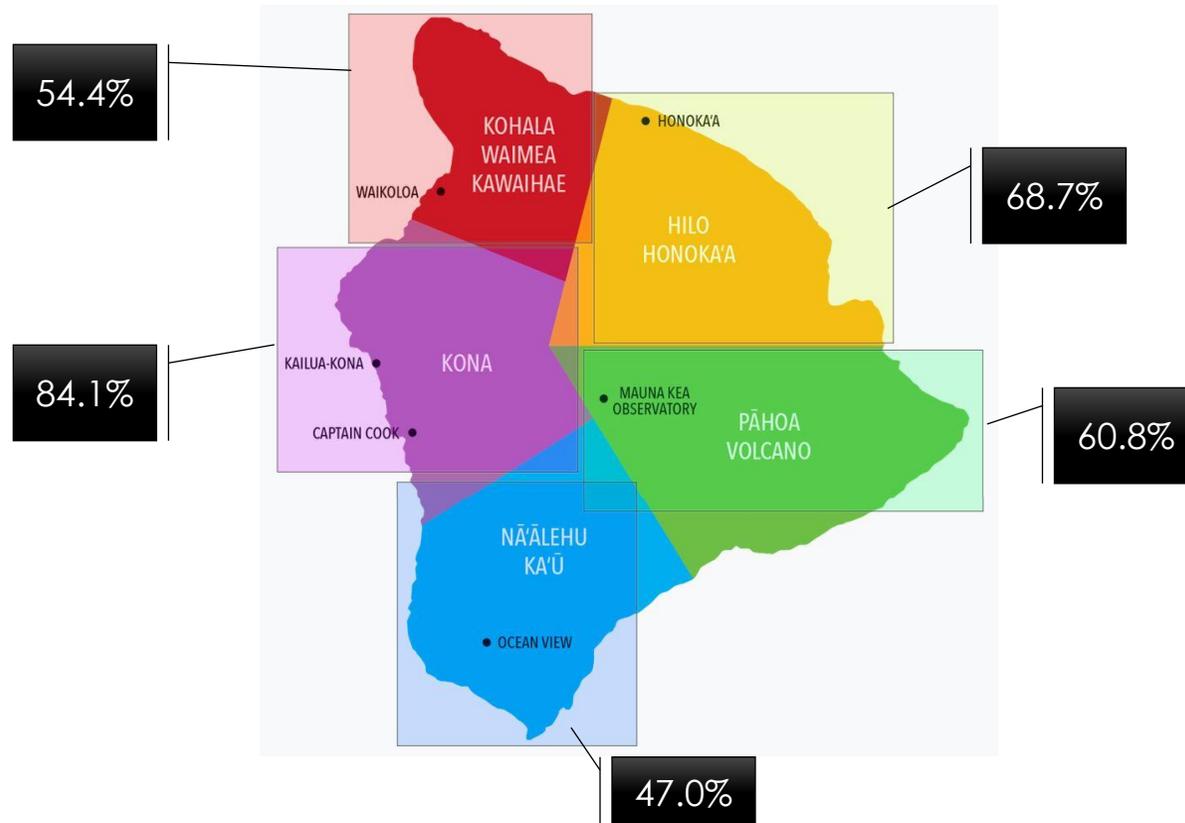


■ Traveled to other side of island	34.7%	36.7%	32.1%	39.0%	20.7%	21.0%	33.1%	33.6%
■ Traveled more than 1 hour one way to reach activities	17.9%	24.5%	26.4%	20.6%	17.8%	29.7%	33.1%	36.9%
■ Traveled 1 hour or less one way to reach activity	24.4%	21.8%	14.0%	23.3%	43.6%	26.4%	26.6%	14.9%
■ Enjoy activities- short drive from accommodations	23.0%	17.0%	27.6%	17.0%	17.8%	22.8%	7.2%	14.6%
● BASE	372	229	21	112	15	48	15	54

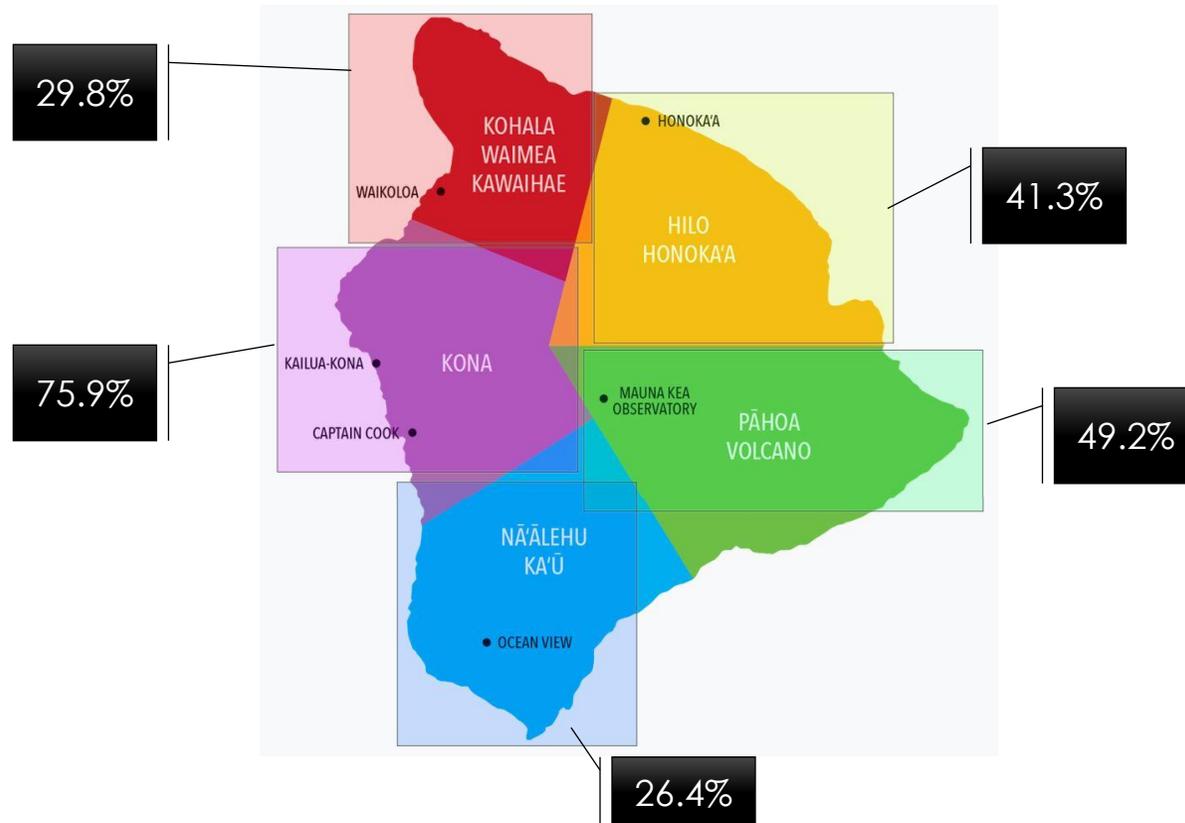
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



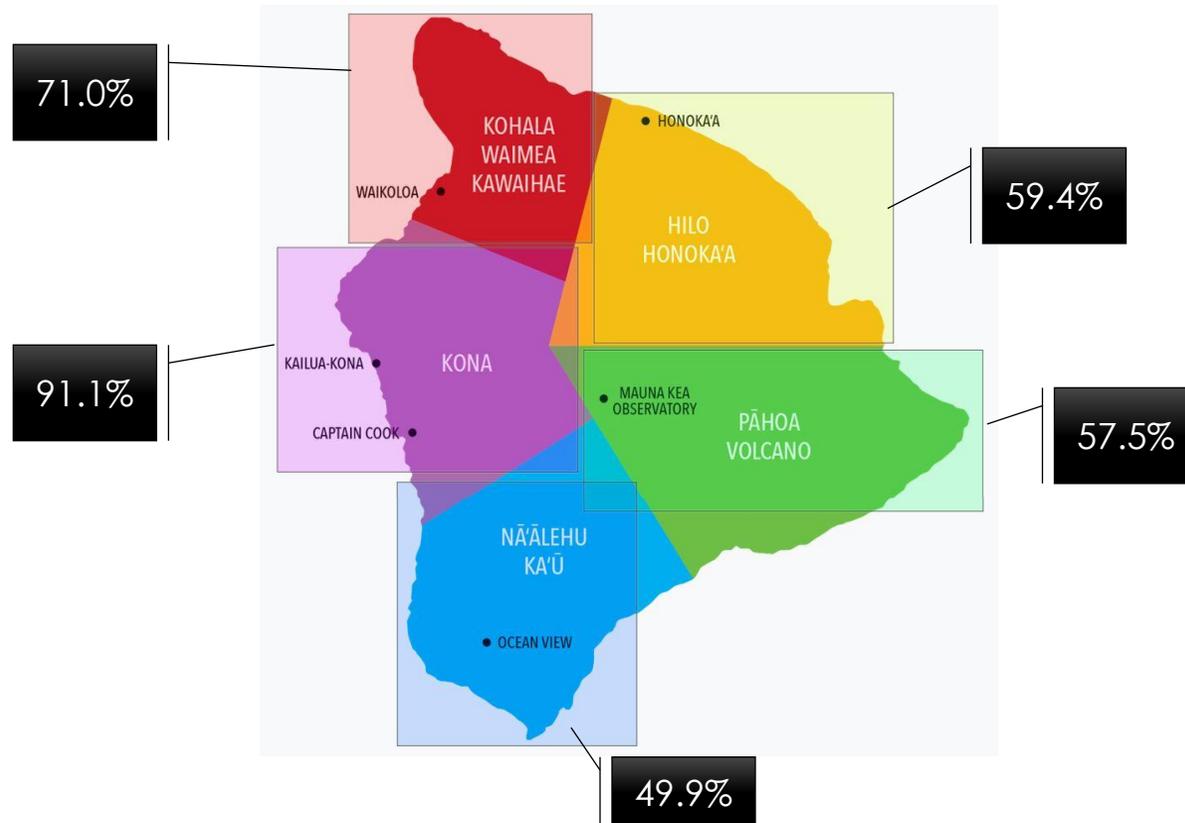
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



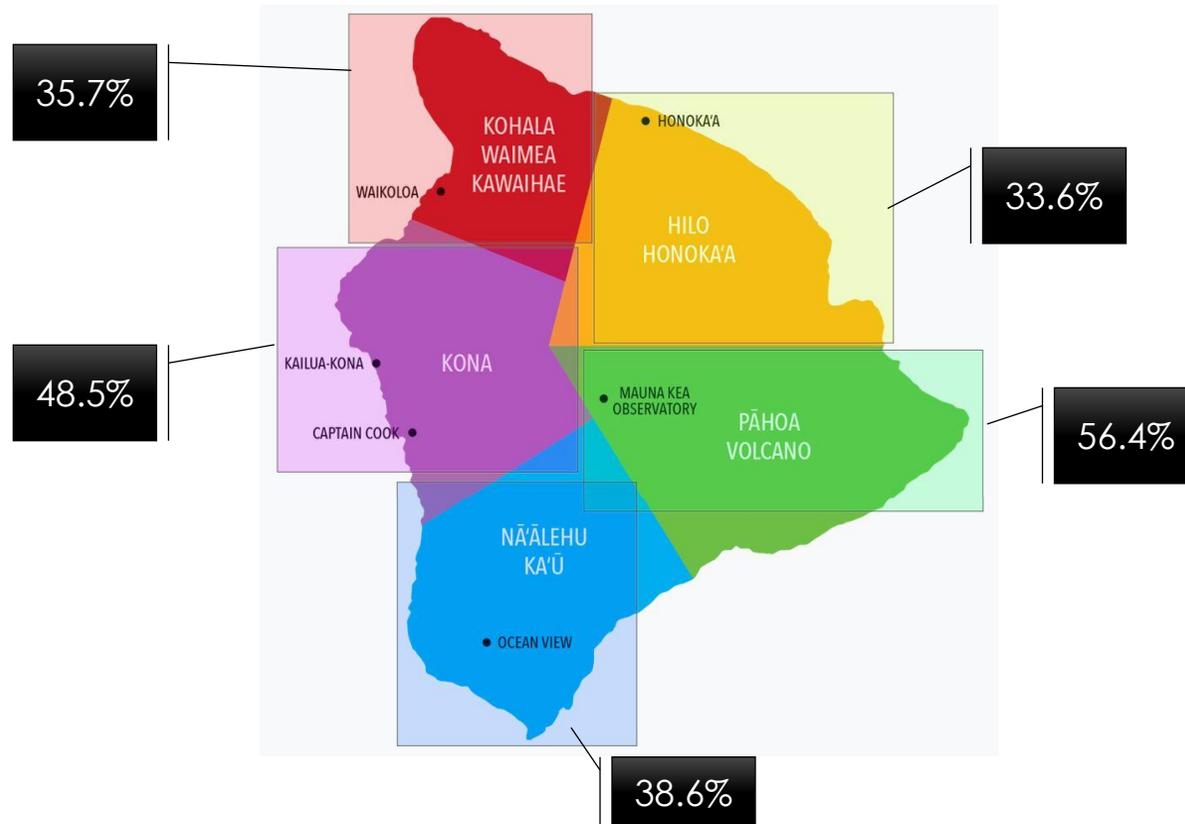
AREAS VISITED ISLAND OF HAWAI'I JAPAN



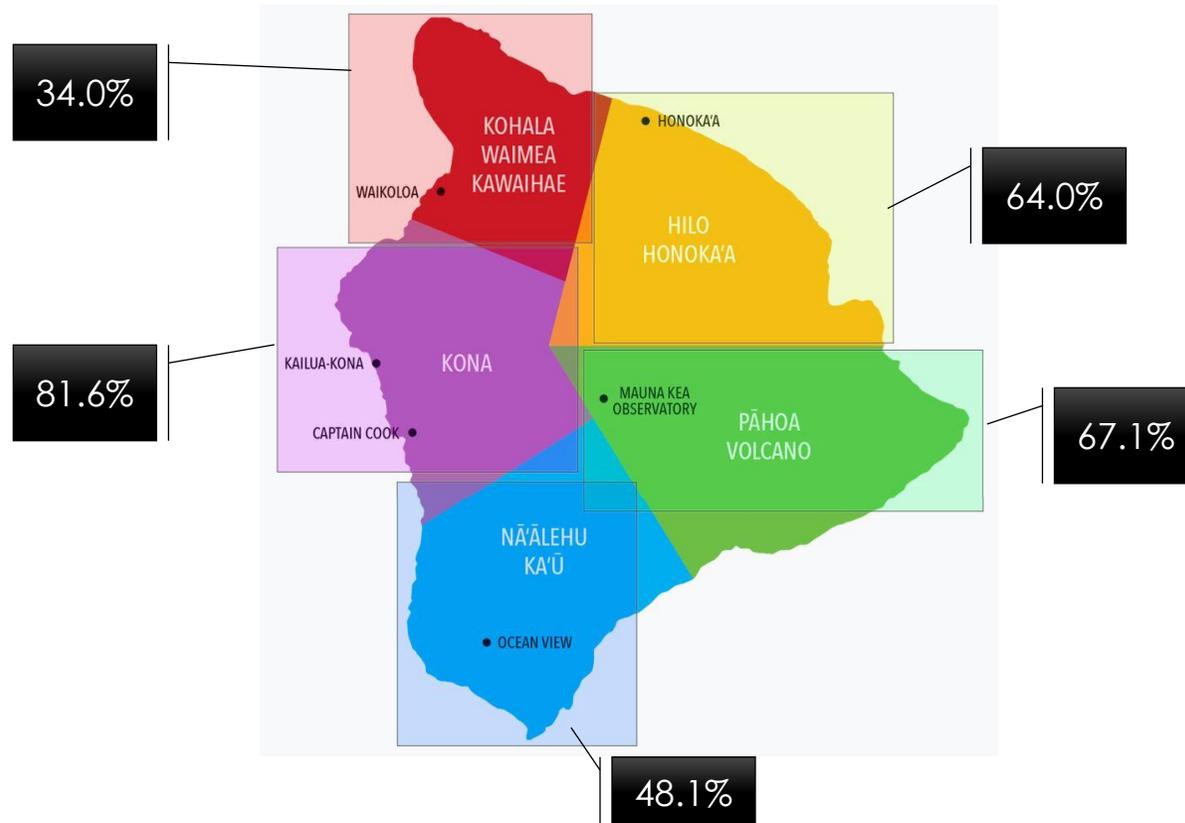
AREAS VISITED ISLAND OF HAWAI'I CANADA



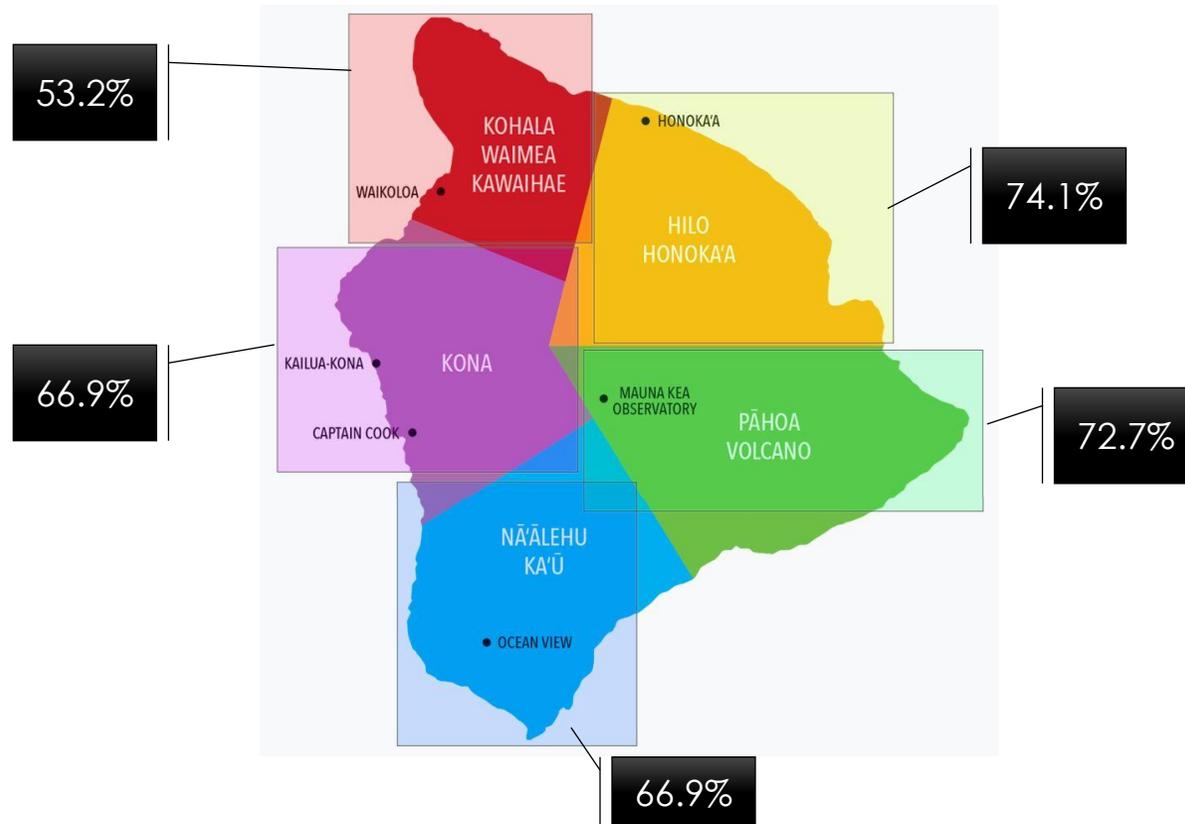
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



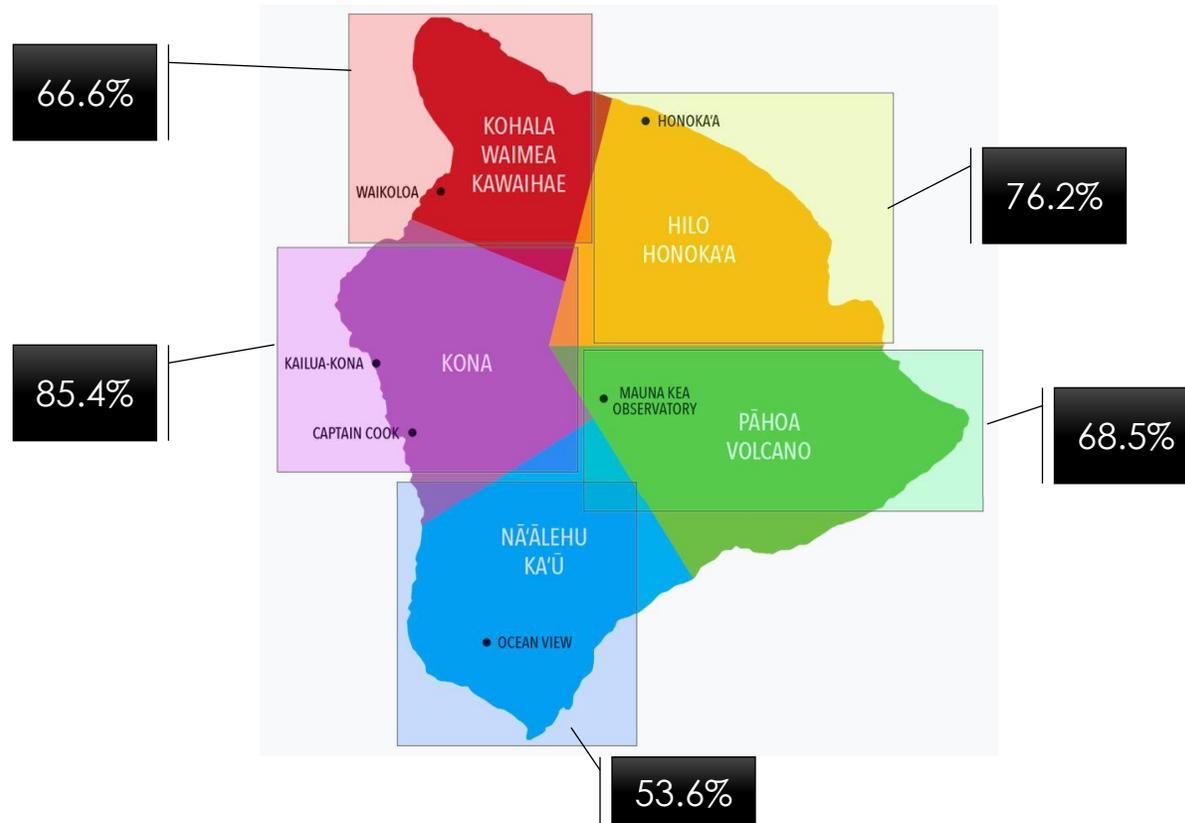
AREAS VISITED ISLAND OF HAWAI'I KOREA



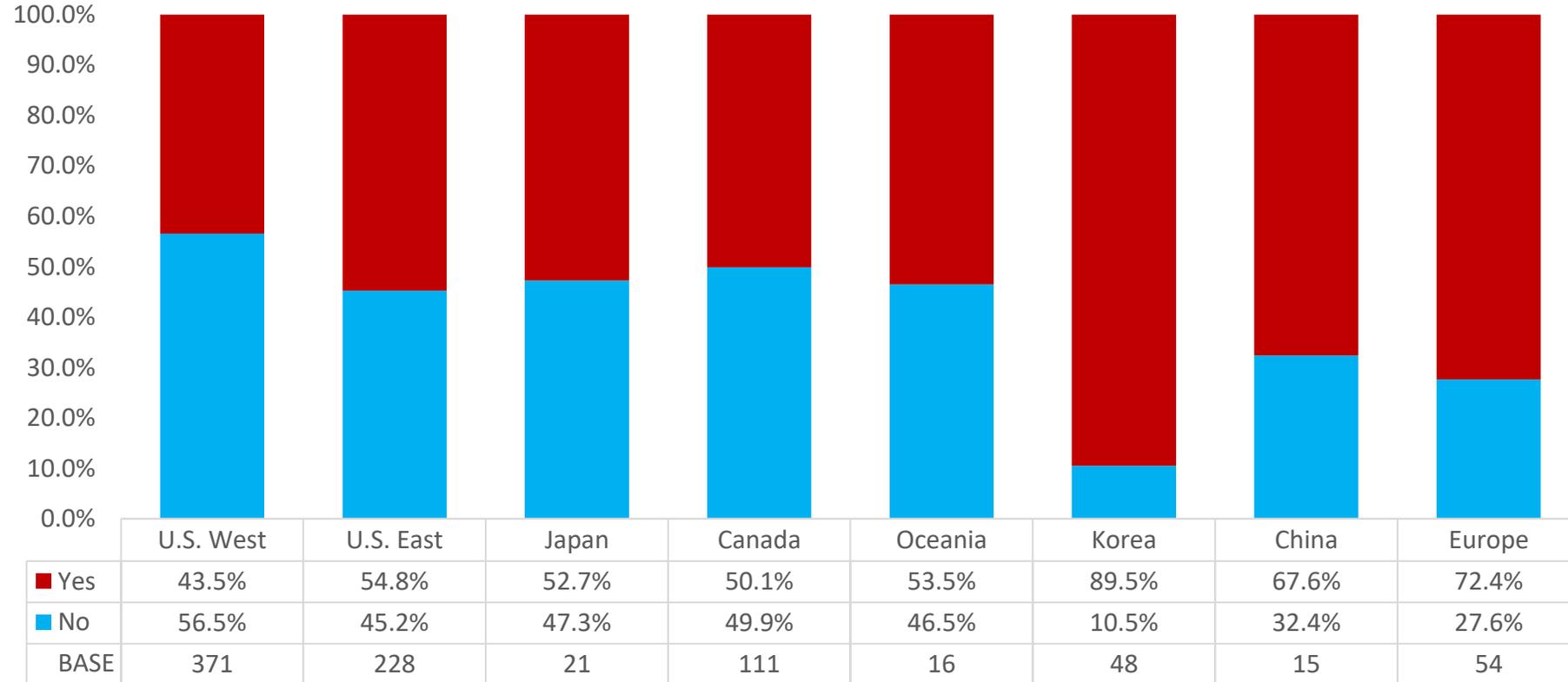
AREAS VISITED ISLAND OF HAWAI'I CHINA



AREAS VISITED ISLAND OF HAWAI'I EUROPE

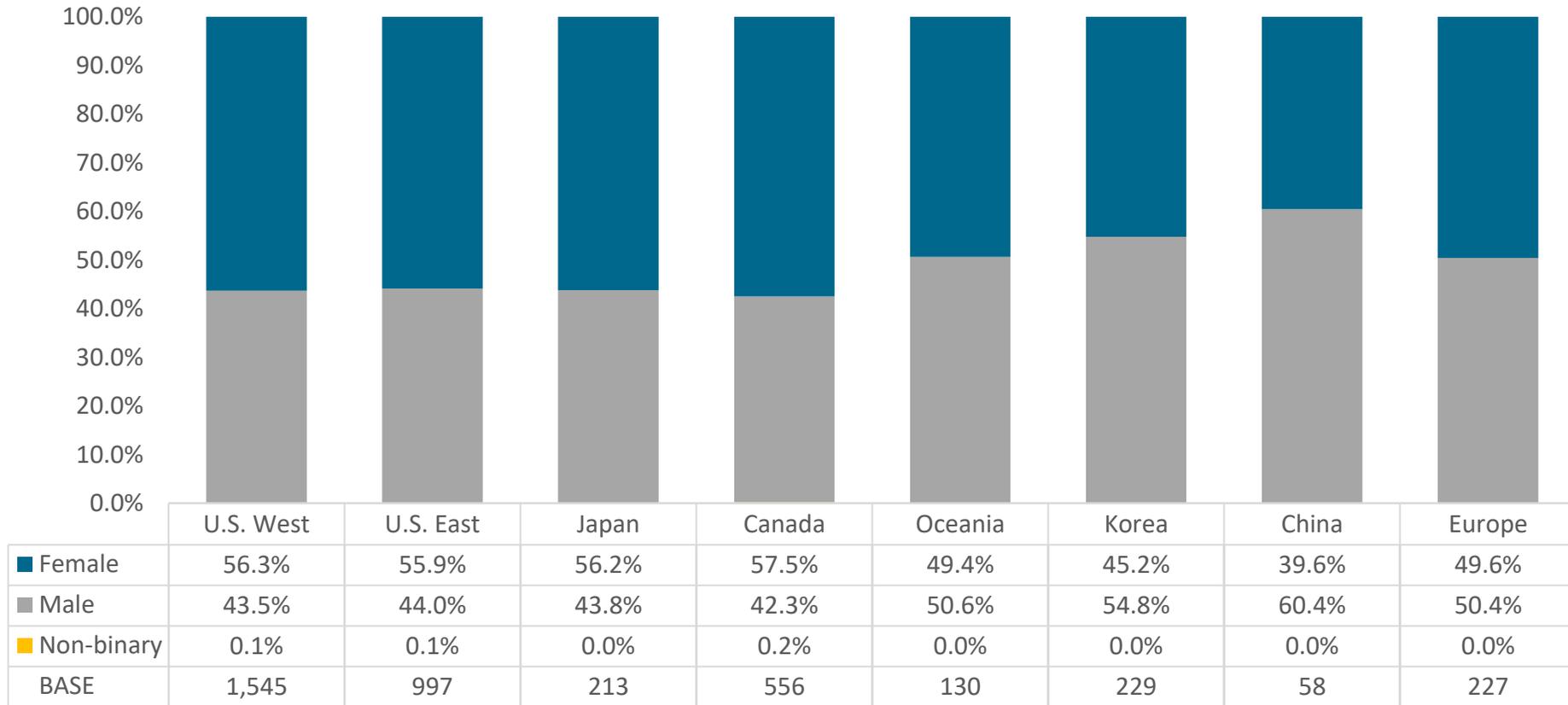


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

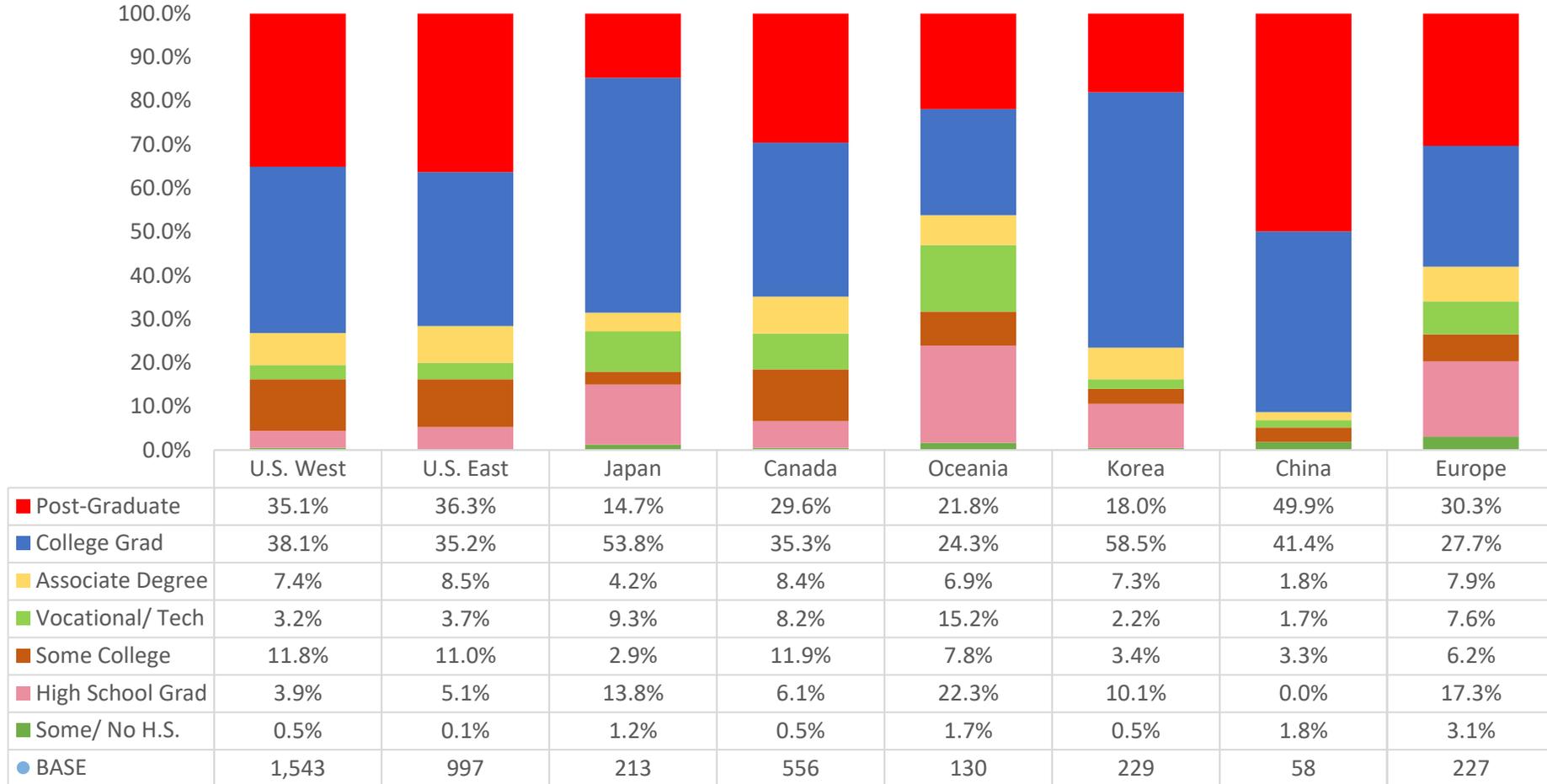


Section 11 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	3.9%	5.8%	4.5%	7.9%	19.8%
\$40,000 to \$59,999	4.1%	4.7%	7.4%	6.5%	10.8%
\$60,000 to \$79,999	6.6%	8.6%	9.1%	10.0%	10.3%
\$80,000 to \$99,999	10.3%	8.5%	11.7%	6.9%	13.5%
\$100,000 to \$124,999	11.2%	14.6%	12.1%	19.0%	8.0%
\$125,000 to \$149,999	10.5%	9.2%	12.0%	9.2%	10.7%
\$150,000 to \$174,999	9.2%	8.2%	7.7%	12.2%	7.6%
\$175,000 to \$199,999	7.2%	7.4%	7.5%	5.0%	4.9%
\$200,000 to \$249,999	11.0%	10.3%	10.9%	10.0%	5.3%
\$250,000 +	26.0%	22.8%	17.1%	13.4%	9.1%
BASE	1,521	987	547	130	224

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	15.5%
¥3.5 - ¥4.5 million	12.2%
¥4.5 - ¥5.5 million	5.7%
¥5.5 - ¥6.5 million	8.1%
¥6.5 - ¥7.5 million	5.4%
¥7.5 - ¥8.5 million	7.5%
¥8.5 - ¥10.0 million	11.7%
¥10.0 - ¥15.0 million	18.4%
¥15.0 - ¥20.0 million	6.6%
¥20.0 million +	8.9%
BASE	213

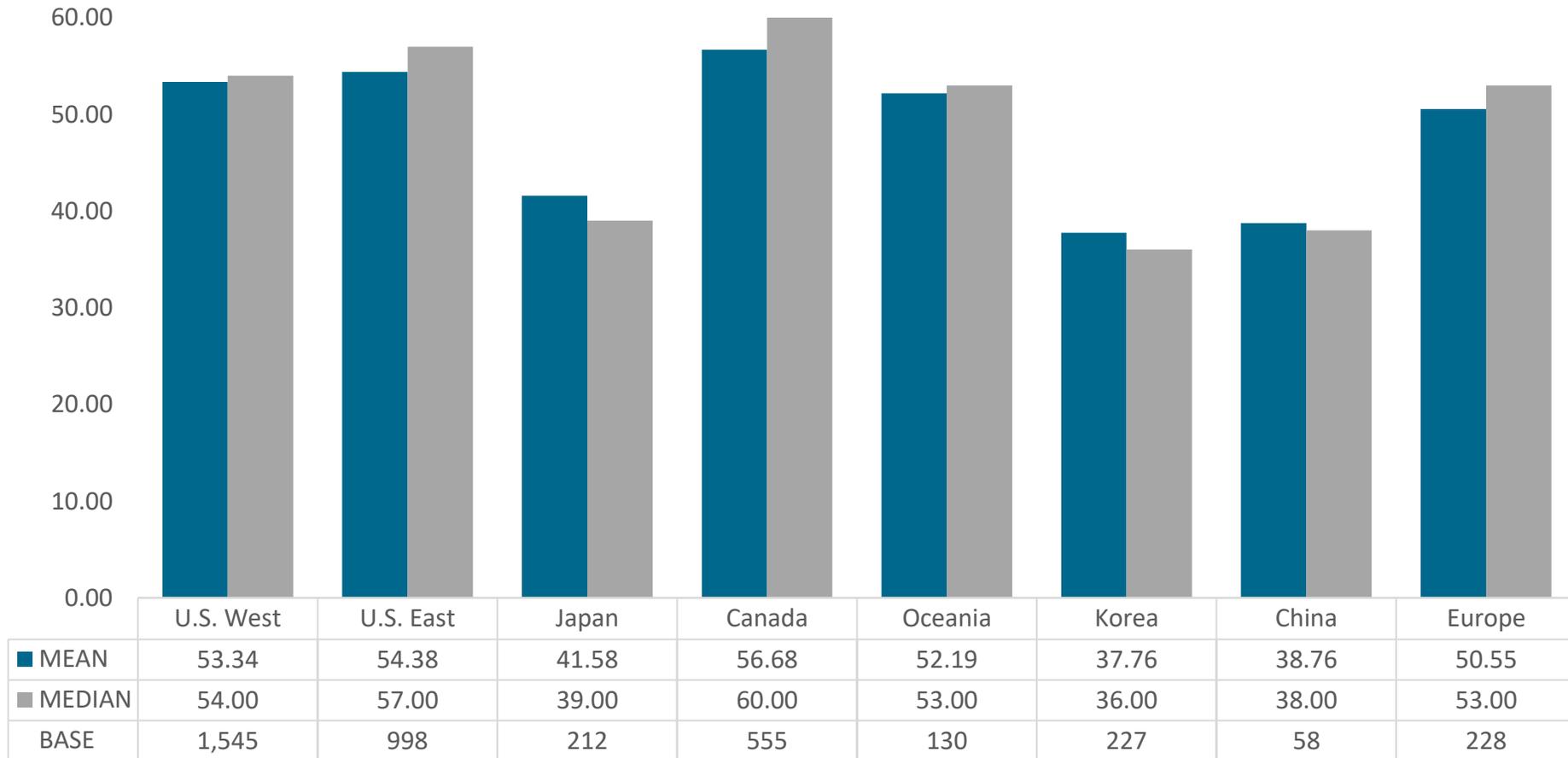
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	13.7%
₩16,305,000 - ₩27,173,999	2.2%
₩27,174,000 - ₩38,041,999	8.2%
₩38,042,000 - ₩48,911,999	10.8%
₩48,912,000 - ₩59,781,999	9.2%
₩59,782,000 - ₩70,652,999	7.9%
₩70,653,000 - ₩81,520,999	6.9%
₩81,521,000 - ₩92,390,999	3.1%
₩92,391,000 - ₩103,259,999	4.9%
₩103,260,000 - ₩149,999,999	15.0%
₩150,000,000 - ₩199,999,999	8.2%
₩200,000,000+	9.9%
BASE	227

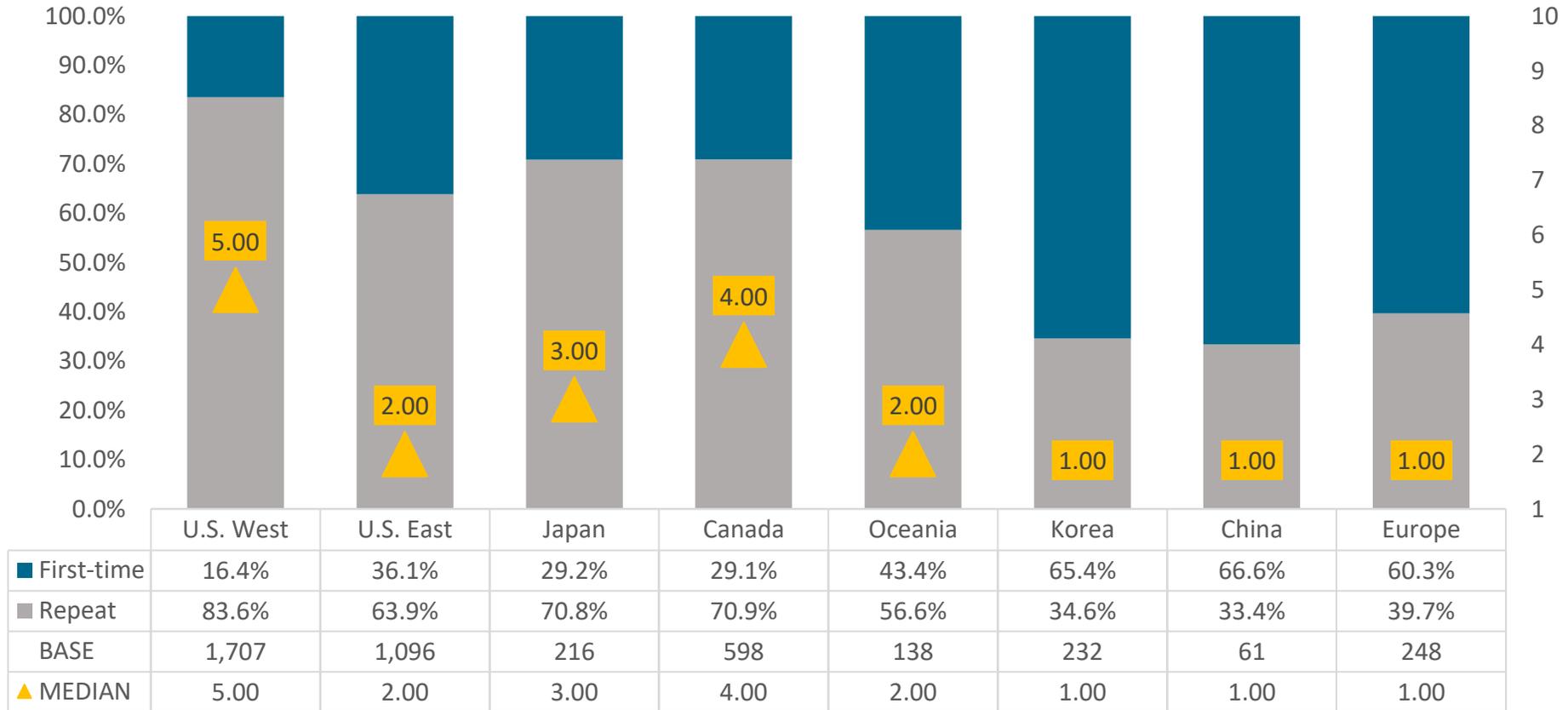
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	15.7%
¥250,800 – ¥376,099	19.2%
¥376,100 – ¥501,399	16.8%
¥501,400 – ¥626,799	12.0%
¥626,800 – ¥783,499	1.7%
¥783,500 – ¥940,199	12.0%
¥940,200 – ¥1,096,899	1.8%
¥1,096,900 - ¥1,253,599	3.7%
¥1,253,600 – ¥1,560,799	1.7%
¥1,560,800+	15.3%
BASE	58

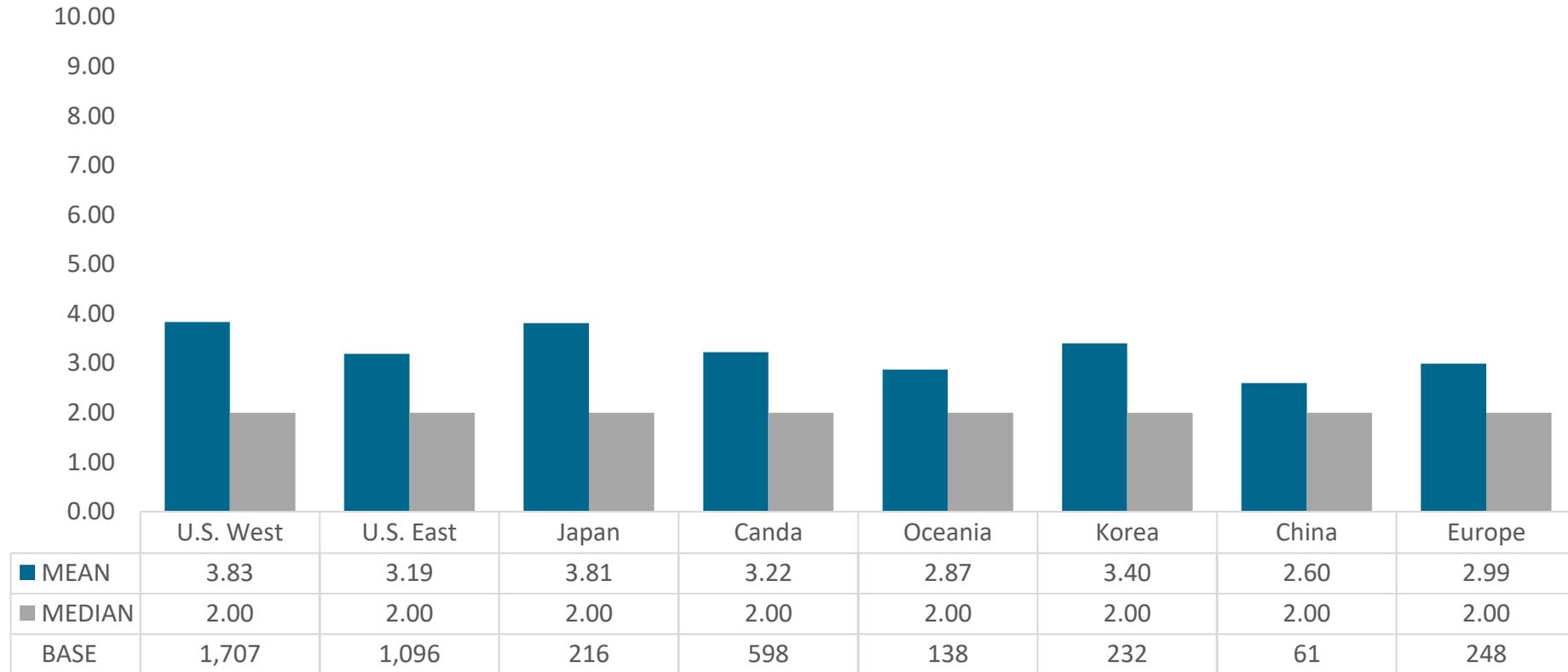
VISITOR PROFILE - AGE



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	61.0%	59.3%	53.5%	68.0%	64.9%	66.6%	37.5%	47.9%
Other adult members of my family	26.5%	26.6%	25.1%	27.2%	26.2%	21.3%	27.5%	16.6%
My child(ren)/ grandchild(ren) under 18	26.1%	15.7%	14.8%	21.7%	26.2%	19.4%	13.5%	7.2%
My friends/ associates	15.8%	15.3%	13.7%	15.2%	7.2%	10.0%	11.8%	19.7%
Myself only (traveled alone/ no one else)	9.8%	11.9%	10.8%	8.2%	11.5%	4.9%	19.9%	14.9%
My girlfriend/ boyfriend	5.9%	5.8%	2.1%	3.0%	4.7%	2.5%	4.8%	8.1%
Same gender partner	1.0%	0.7%	0.9%	1.2%	0.0%	0.8%	0.0%	0.8%
BASE	1,707	1,096	216	598	138	232	61	248

Section 12 – 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	699	3.71
U.S. East	549	4.18
Japan	202	6.90
Canada	276	5.90
Oceania	128	8.66
Korea	223	6.56
China	57	12.98
Europe	182	7.26
All MMAs	2,316	2.04

* 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	193	7.05
U.S. East	206	6.83
Japan	4	49.00
Canada	106	9.52
Oceania	3	56.58
Korea	8	34.65
China	1	98.00
Europe	52	13.59
All MMAs	573	4.09

* 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 \pm
U.S. West	542	4.21
U.S. East	410	4.84
Japan	6	40.01
Canada	236	6.38
Oceania	10	30.99
Korea	18	23.10
China	9	32.67
Europe	94	10.11
All MMAs	1,325	2.69

* 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	405	4.87
U.S. East	298	5.68
Japan	21	21.39
Canada	143	8.20
Oceania	17	23.77
Korea	51	13.72
China	16	24.50
Europe	80	10.96
All MMAs	1,031	3.05

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

