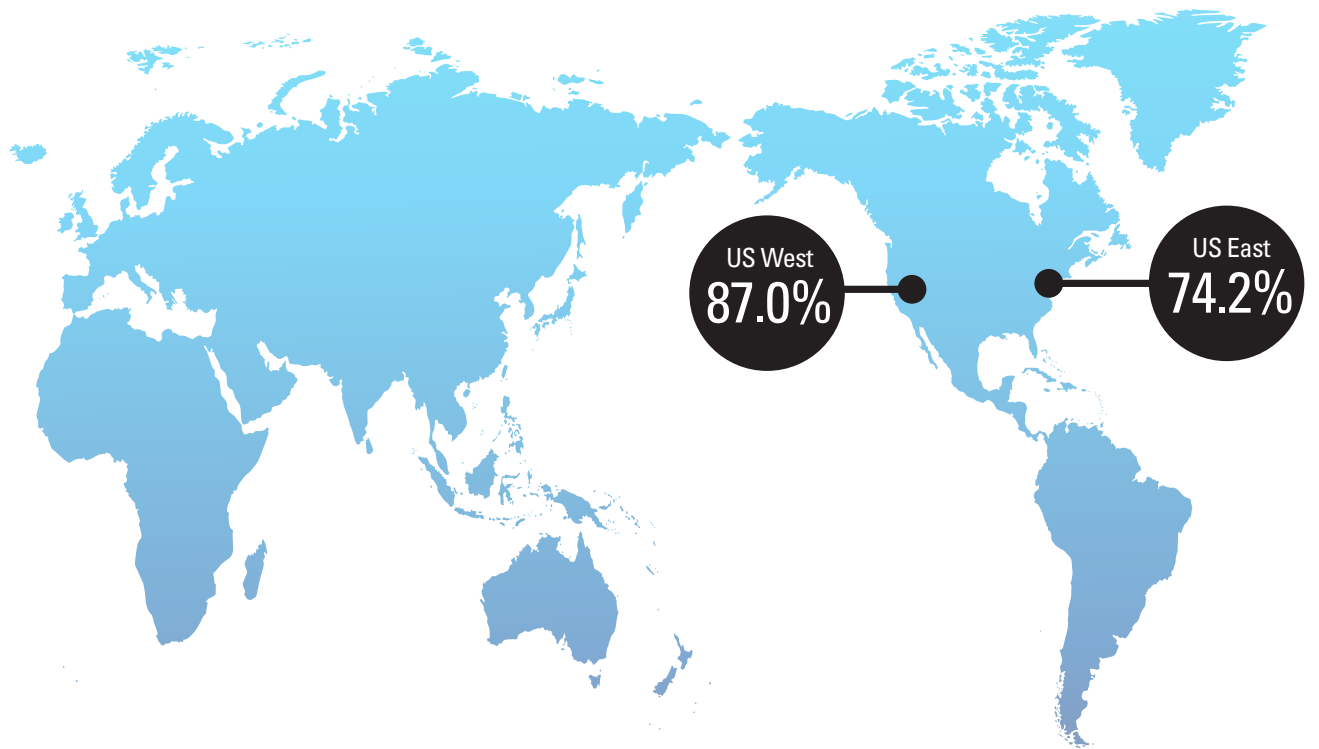


VISITORS WHO SAID THEY
WERE LIKELY TO RETURN
TO HAWAII IN THE
NEXT FIVE YEARS



Visitor Profile by MMA

	US West	US East
Average Age	49	46
Affluent Households	33% \$200K+	26% \$200K+
Education	39% College Grad	38% College Grad

EFFECTS OF COVID-19

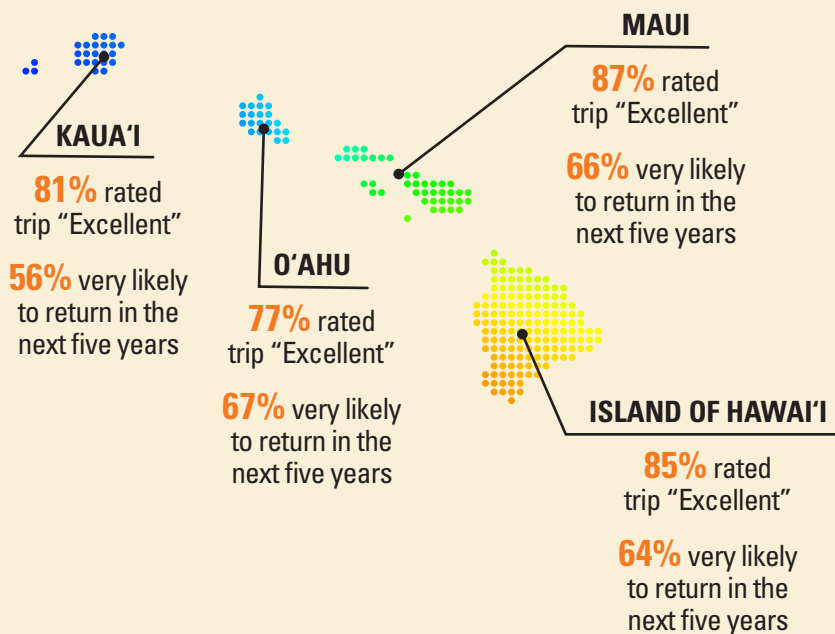
On March 26, 2020, the State of Hawaii started requiring all visitors and returning residents to Hawaii to complete a mandatory, 14-day quarantine. Then on October 15, 2020, the State of Hawaii Safe Travels program began, which allowed all visitors and returning residents to avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawaii. On December 4, the mandatory quarantine period for all those who did not have a negative test result was reduced from 14 days to 10 days.

Nearly all incoming visitors to the islands in Q4 2020 were from the U.S. Mainland, despite the limited resumption of flights to Hawaii from Japan and Canada in November and December 2020, respectively. Therefore, the Visitor Satisfaction and Activity Survey was fielded only among visitors from the U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming) and U.S. East (all other states in the Continental U.S.). Given the uncertainty around the number of visitors who would arrive in Hawaii during Q4 2020, all visitors who met the sampling criteria were sent an email invitation with a link to complete the survey online, resulting in higher than usual sample sizes for these MMAs.

- U.S. West: 8,619 completed surveys, +/-1.06% margin of error*
- U.S. East: 4,239 completed surveys, +/-1.51% margin of error*



MARKET AREA SNAPSHOT: US EAST



TOP ATTRACTION BY ISLAND

