

# Visitor Satisfaction Study

Q2 2021

Prepared for:  
Hawai'i Tourism Authority

[ANTHOLOGY®]

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# TABLE OF CONTENTS

- Section 1 – Visitor Satisfaction
- Section 2 – Activities
- Section 3 – Travelers with Disabilities
- Section 4 – Alternative Messaging
- Section 5 – Island of O‘ahu
- Section 6 – Island of Kaua‘i
- Section 7 – Island of Maui
- Section 8 – Island of Hawai‘i
- Section 9 – Visitor Profile
- Section 10 – Island Survey Methodology

# METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major market areas (MMAs) who recently completed a trip to Hawai'i. For Q2 2021, the sampled MMAs include: 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.).

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	1,678	2.39%	21.43%
<b>U.S. East</b>	1,725	2.36%	22.29%
<b>All MMAs</b>	3,403	1.68%	21.86%

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

## METHODOLOGY – OVERALL (cont.)

Monthly samples of visitors who stayed for at least two days are drawn from completed the Domestic In-Flight database. Selected U.S. visitors were sent an email invitation with a link to complete the survey online.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both MMAs were reported as weighted data based on weights generated for 2021 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

*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.*

# METHODOLOGY – Effect of COVID-19

## **COVID-19 Travel Restrictions**

Due to ongoing travel restrictions for international source markets, there were an insufficient number of visitors to sample for the VSAT study from Canada, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter.

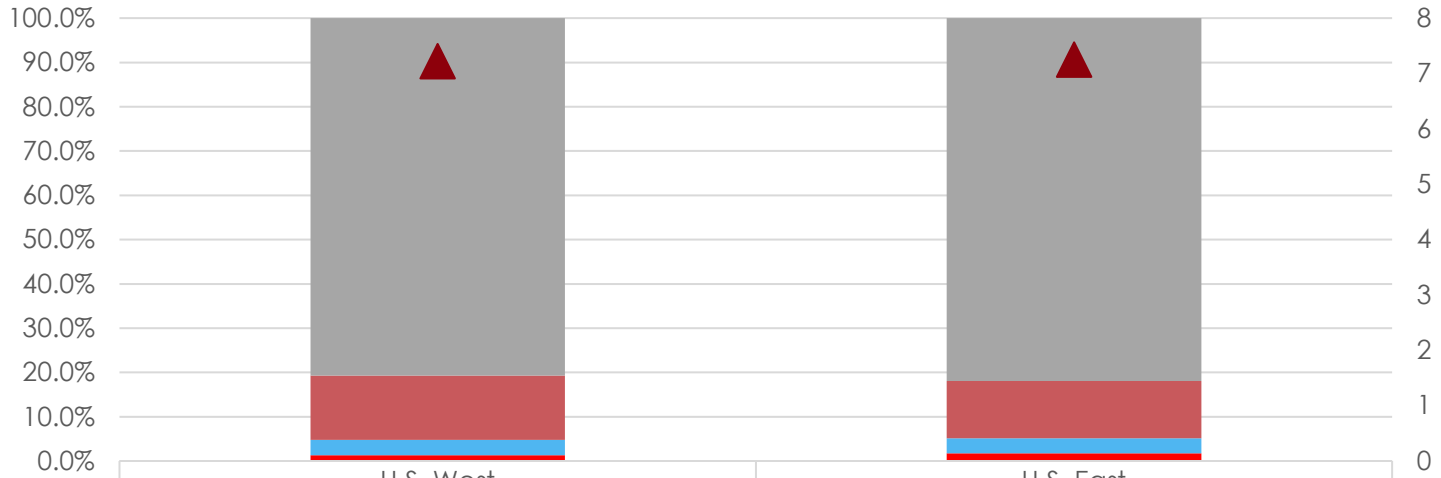
## **State of Hawai'i Safe Travels Program**

The Safe Travels Program offered by the State of Hawai'i allows arriving visitors and returning residents to Hawai'i to bypass a mandatory, 10-day 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 Hawai'i.

# SECTION 1 – VISITOR SATISFACTION

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



	U.S. West	U.S. East
■ Excellent (7-8)	80.7%	81.9%
■ Above Avg (5-6)	14.5%	12.9%
■ Below Avg (3-4)	3.4%	3.4%
■ Poor (1-2)	1.3%	1.7%
BASE	1,678	1,725
▲ MEAN	7.22	7.25

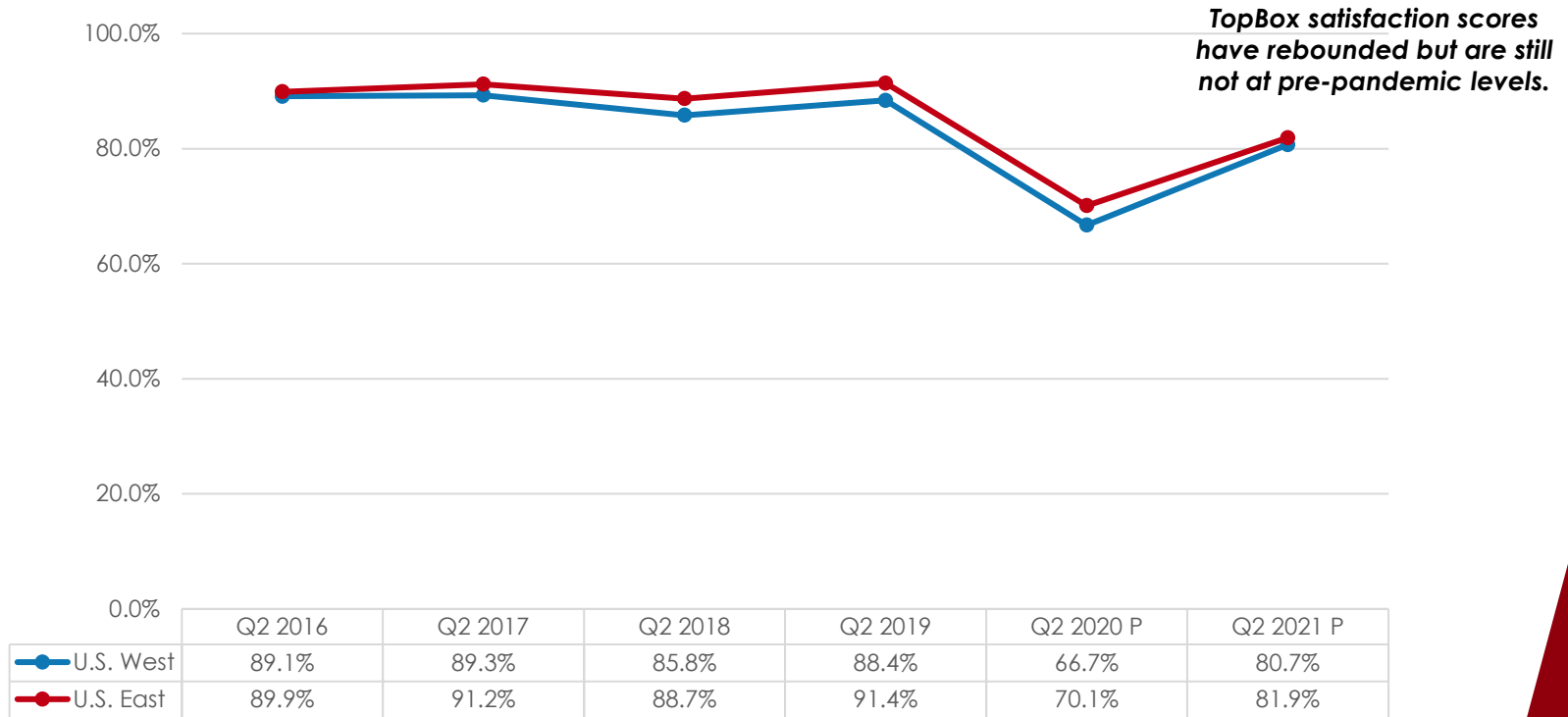
# SATISFACTION – STATE OF HAWAI'I BY MMA

- **Visits to the state:** Overall satisfaction with Hawai'i is higher amongst first-time visitors from both U.S. West and U.S. East.
- **Age:** Satisfaction ratings were the highest in both U.S. West and U.S. East among younger travelers under the age of 35. Conversely, in both visitor markets satisfaction mean scores were lowest among senior travelers.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than male visitors.
- **Islands visited:** Among visitors from U.S. West, those whose trip included travel to multiple islands gave lower satisfaction scores compared to those from this visitor market who traveled to just a single island.



# SATISFACTION – STATE OF HAWAI‘I BY MMA

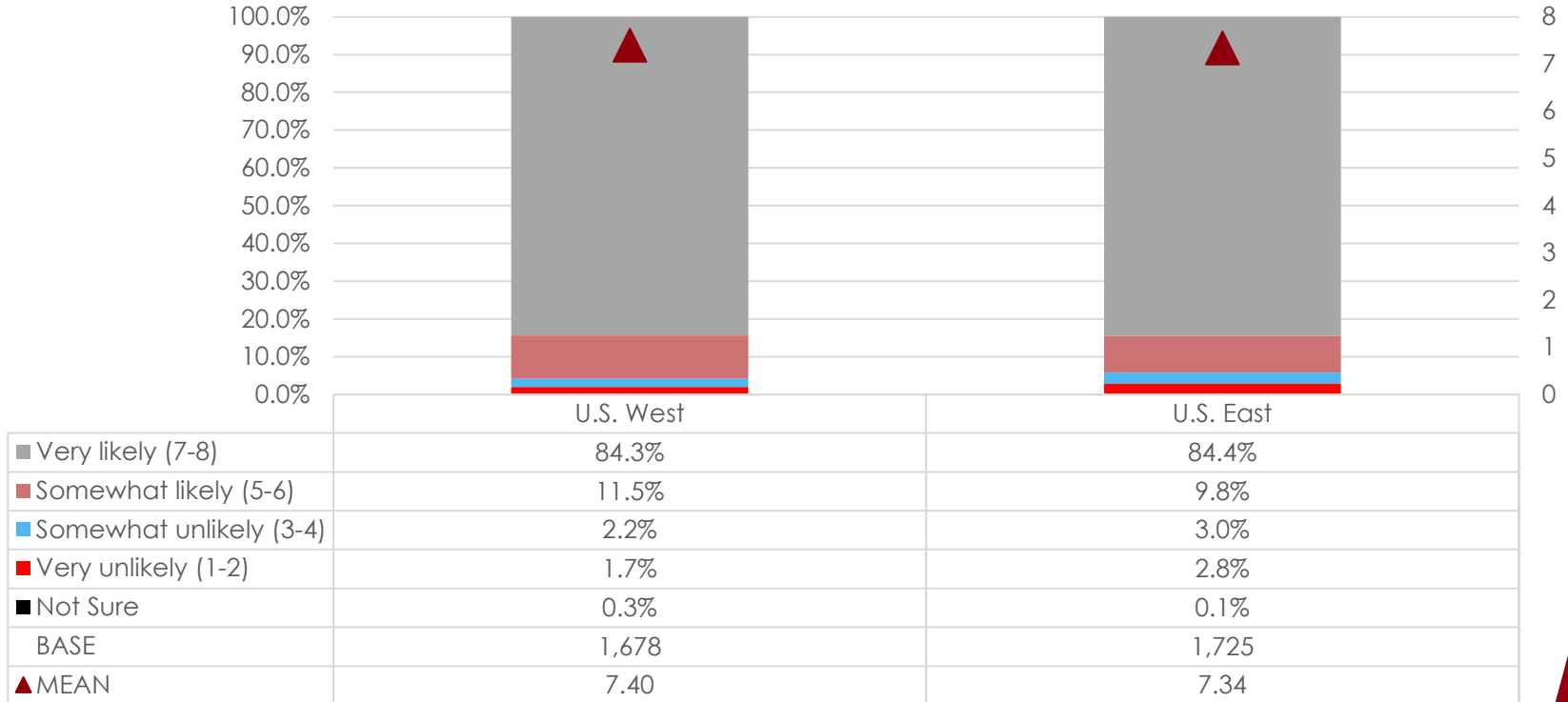
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

# BRAND/DESTINATION – ADVOCACY

8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely

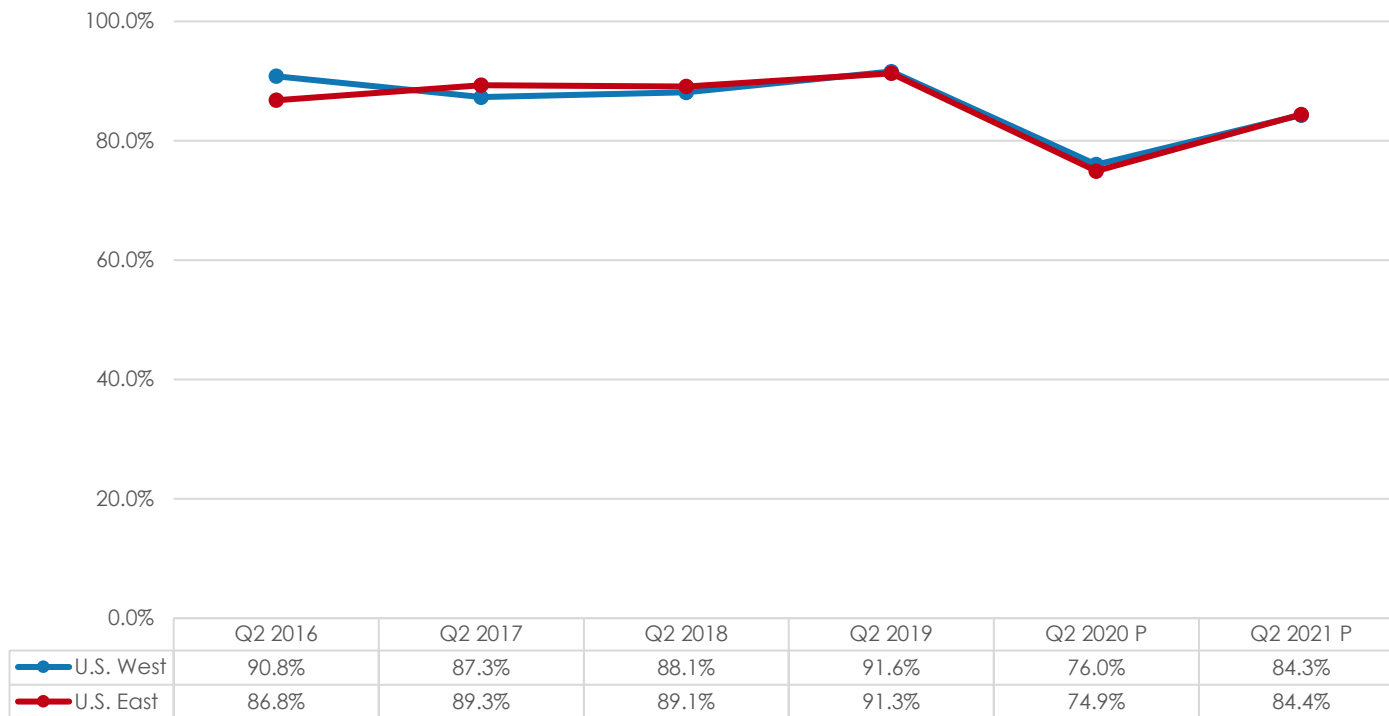


# BRAND/DESTINATION – ADVOCACY

- **Age:** Brand advocacy scores from both U.S. West and U.S. East is lowest among senior travelers.
- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to male visitors.
- **Islands visited:** U.S. West travelers those whose trip consisted of visit to a single island were more likely to recommend the state compared to those who visited multiple islands.

# BRAND/DESTINATION – ADVOCACY

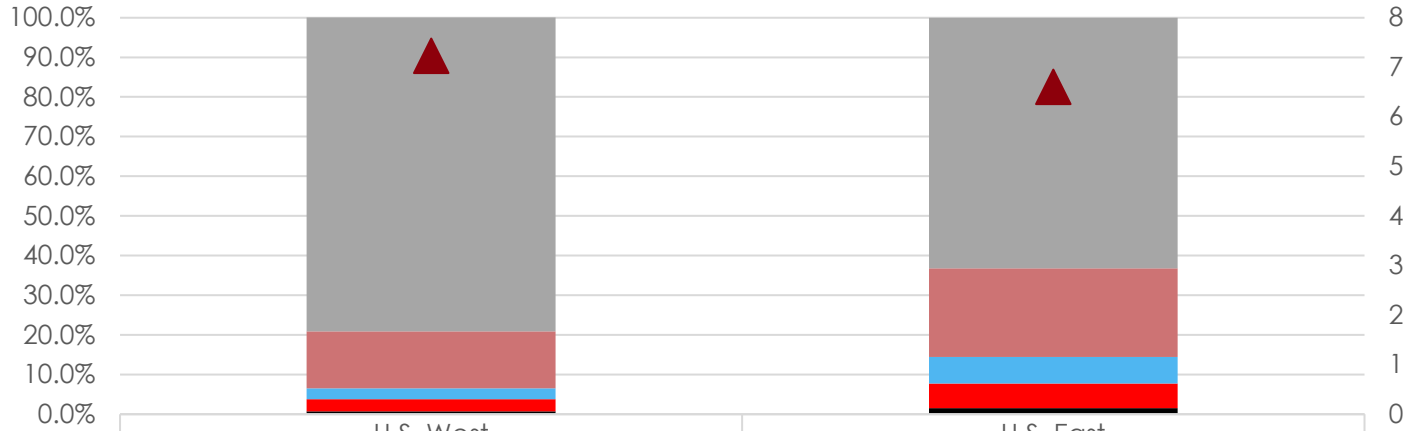
## TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



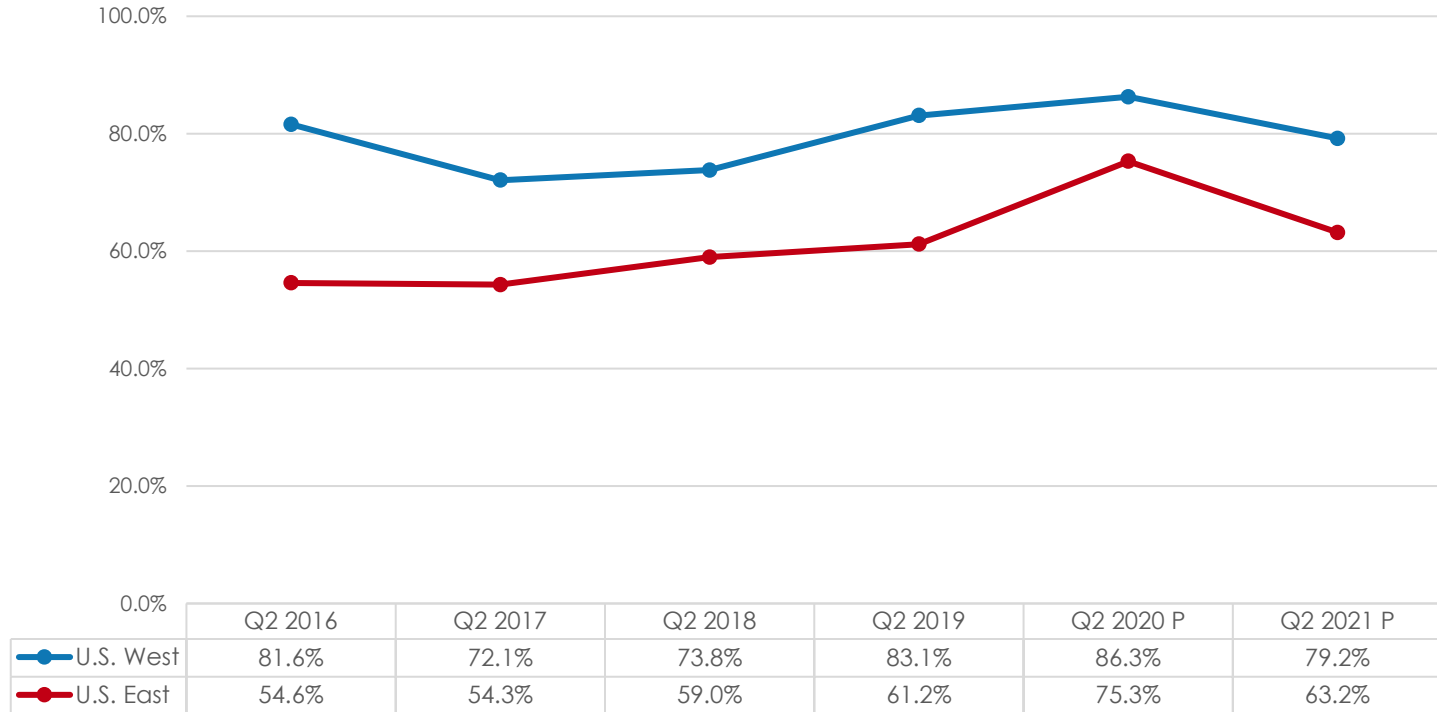
	U.S. West	U.S. East
■ Very likely (7-8)	79.2%	63.2%
■ Somewhat likely (5-6)	14.3%	22.3%
■ Somewhat unlikely (3-4)	2.7%	6.7%
■ Very unlikely (1-2)	3.1%	6.3%
■ Not Sure	0.7%	1.5%
BASE	1,678	1,725
▲ MEAN	7.23	6.60

# LIKELIHOOD OF RETURN VISIT

- **Repeat vs First-time:** Repeat visitors from both U.S. markets express a stronger likelihood of returning to the islands in the next five years compared to first-time visitors.
- **Islands visited:** Those whose trip consisted of visiting a single island expressed a stronger possibility of return compared to those who visited multiple islands during their stay. This was true in both U.S. West and U.S East visitor markets.
- **Gender:** Female visitors in from both U.S. West and U.S. East express a higher likelihood of returning to the state in the next five years compared to their male counterparts.

# LIKELIHOOD OF RETURN VISIT

TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q2 2020 P	Q2 2021 P
37.5% Unfriendly people/ Felt unwelcome	41.5% Too expensive
36.5% COVID-19	37.1% Want to go someplace new
30.2% Too expensive	33.6% Poor value
19.8% No reason to return/ nothing new	29.5% COVID-19
18.8% Poor value	20.3% Too crowded/ congested/ traffic
14.6% Too crowded/ congested/ traffic	20.2% No reason to return/ nothing new
14.6% Poor service	14.4% Unfriendly people/ felt unwelcome
12.6% Too commercialized/ overdeveloped	11.9% Poor service
10.4% Want to go someplace new	11.5% Too commercial/ overdeveloped
	11.5% Five years is too soon

P= Preliminary Data



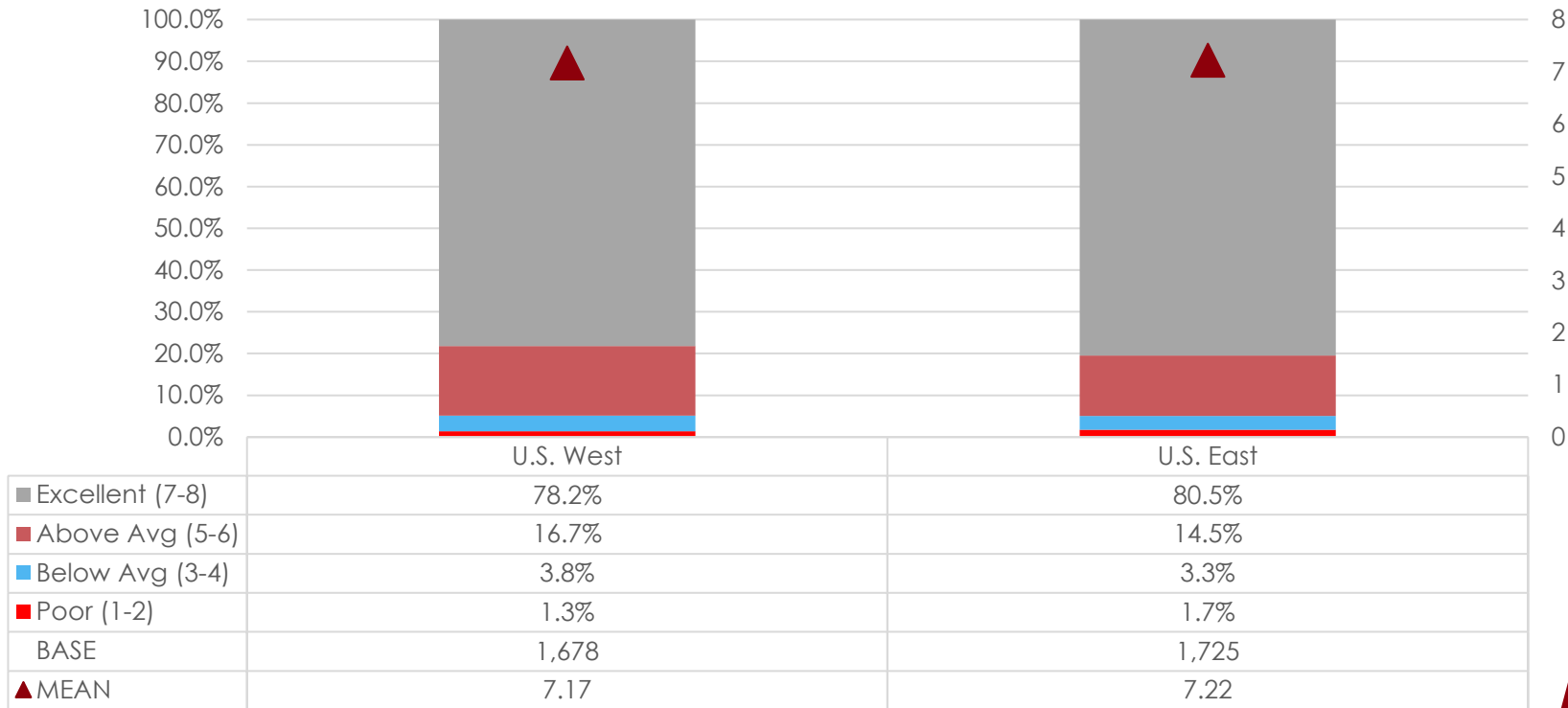
# UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q2 2020 P	Q2 2021 P
37.6% Too expensive	47.0% Too expensive
37.2% COVID-19	32.5% Want to go someplace new
15.6% Unfriendly people/ felt unwelcome	32.2% Flight too long
12.7% Want to go someplace new	20.9% COVID-19
12.5% Poor value	17.8% Too crowded/ congested/ traffic
12.4% Too crowded/ congested/ traffic	16.5% Poor value
12.4% Too commercialized/ overdeveloped	14.5% Unfriendly people/ felt unwelcome
	12.5% Too commercialized/ overdeveloped
	11.6% Five years is too soon
	10.4% Poor service

P= Preliminary Data

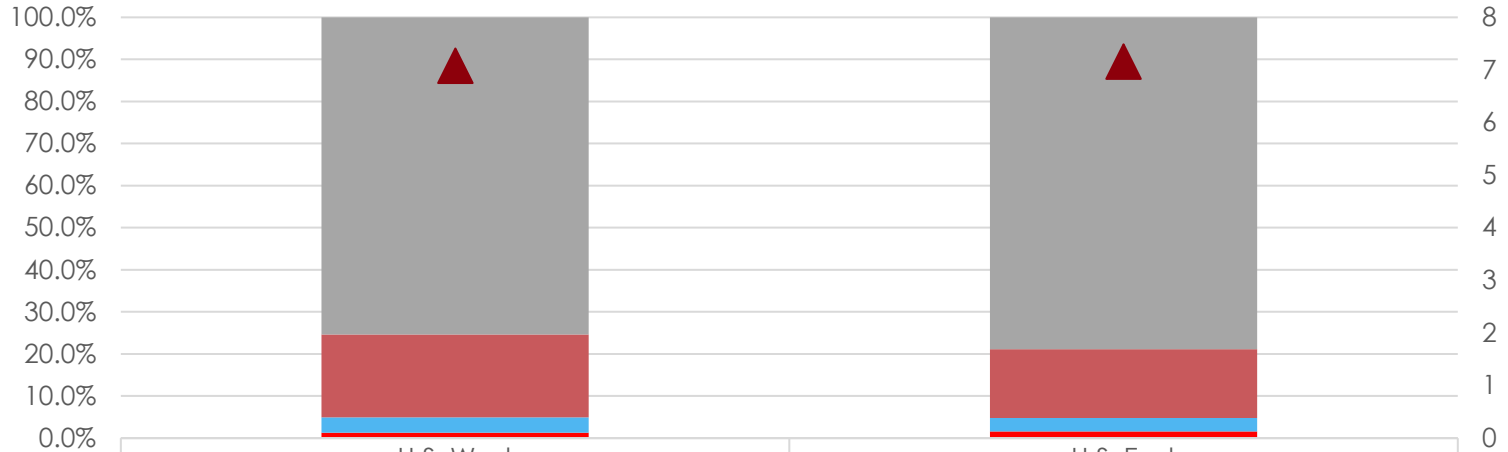
# OFFERING A VARIETY OF EXPERIENCES

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



# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

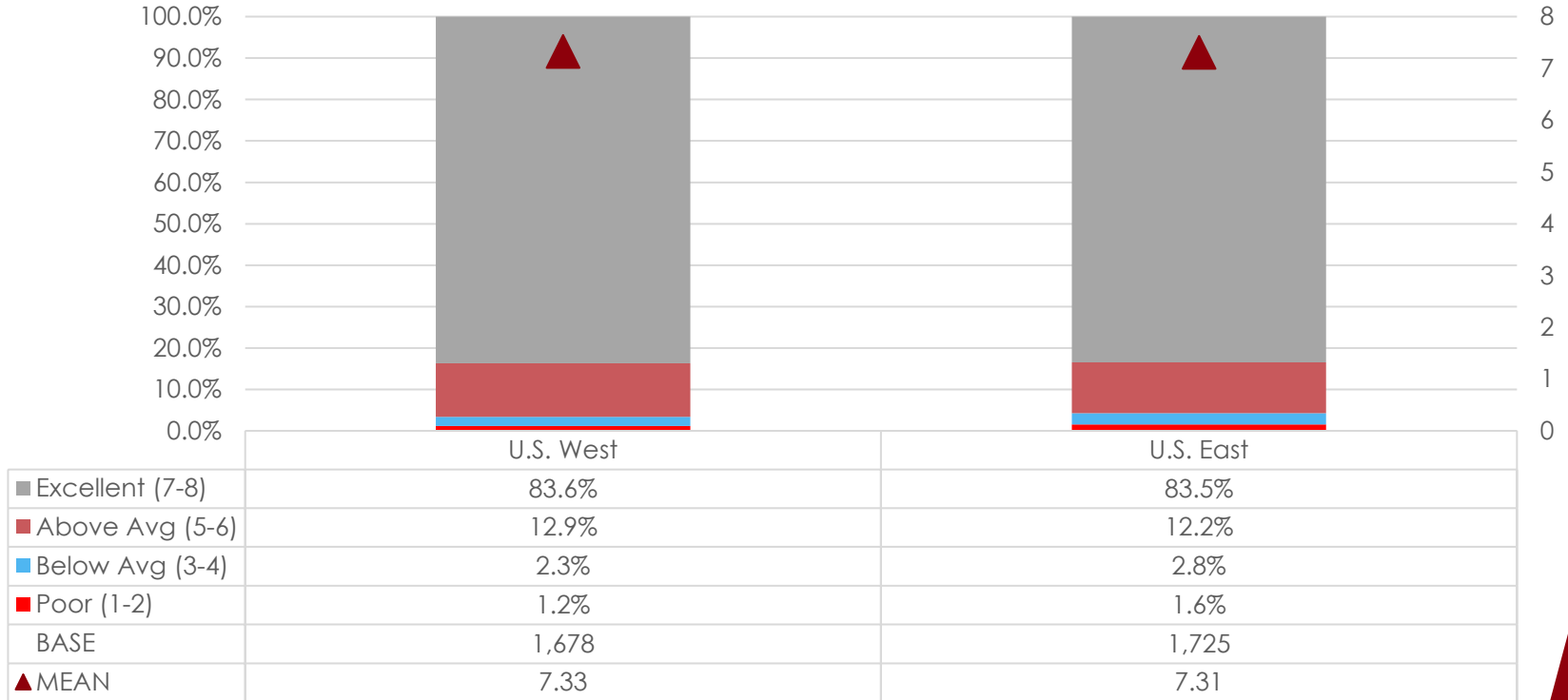
8-pt Rating Scale  
8=Excellent / 1=Poor



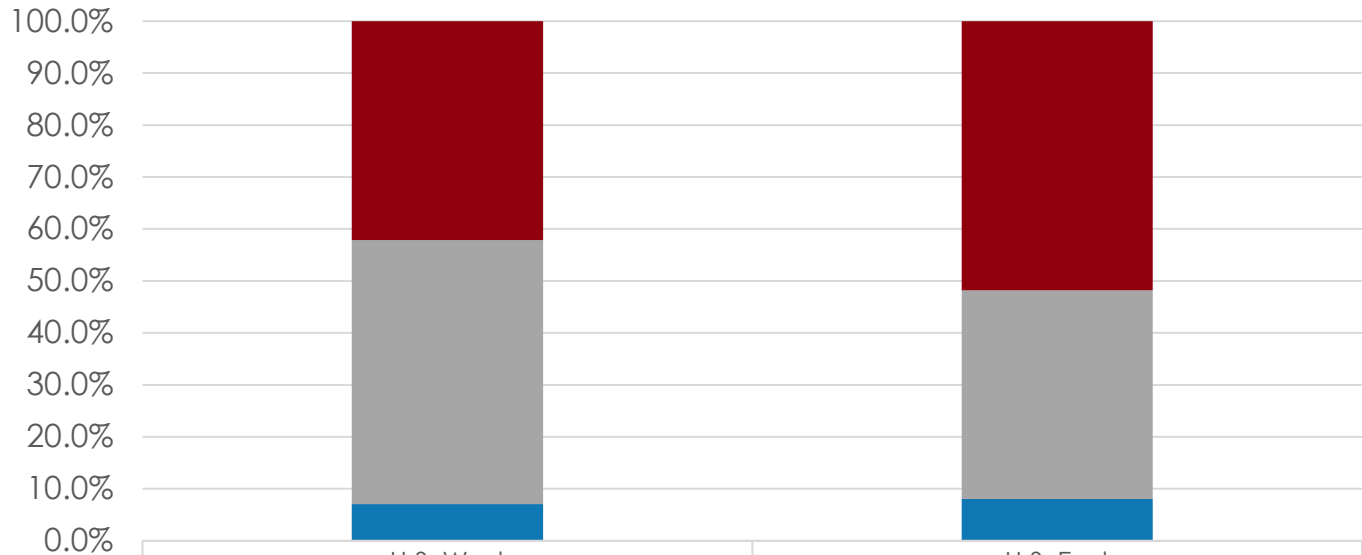
	U.S. West	U.S. East
■ Excellent (7-8)	75.4%	78.9%
■ Above Avg (5-6)	19.6%	16.3%
■ Below Avg (3-4)	3.7%	3.2%
■ Poor (1-2)	1.3%	1.6%
BASE	1,678	1,725
▲ MEAN	7.08	7.16

# BEING A SAFE AND SECURE DESTINATION

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



# SATISFACTION – HAWAI'I TRIP EXPECTATIONS



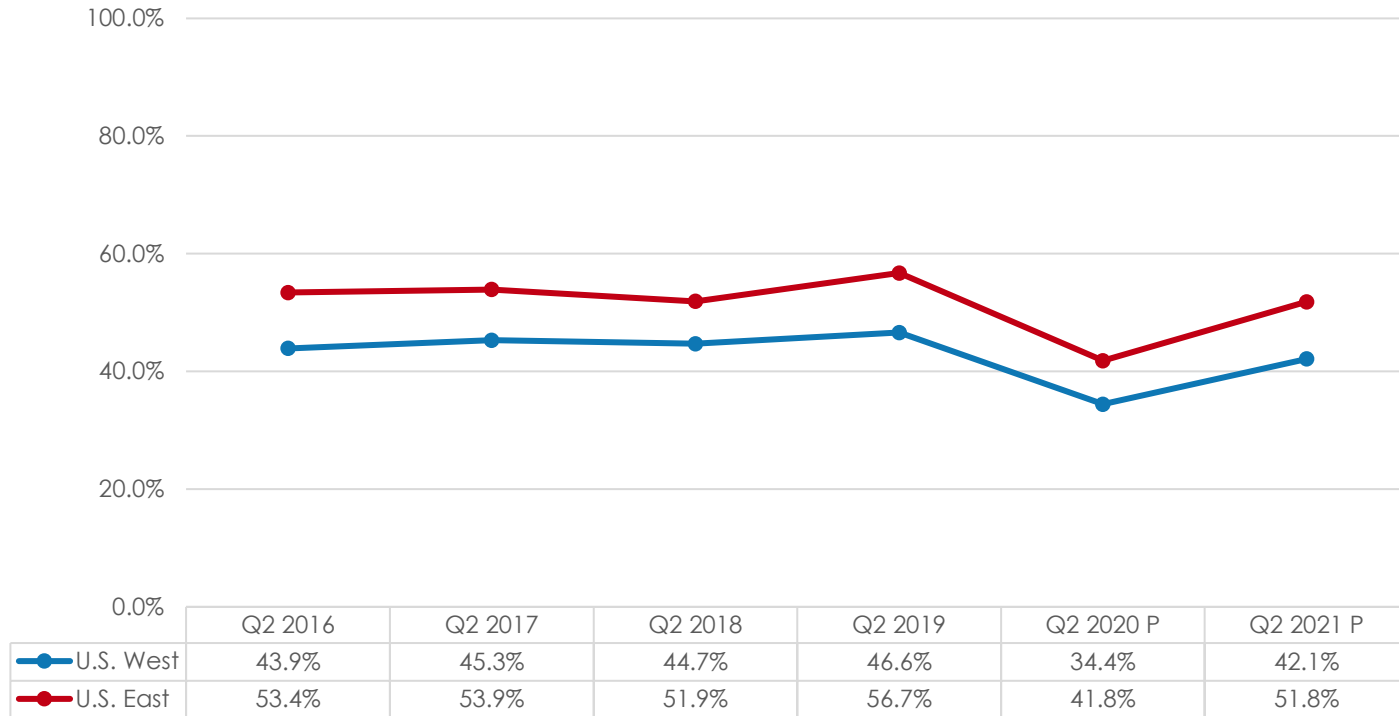
	U.S. West	U.S. East
Exceeded expectations	42.1%	51.8%
Met expectations	50.8%	40.1%
Did NOT meet expectations	7.1%	8.0%
BASE	1,678	1,725

# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

- **Age:** Among travelers from both U.S. West and U.S. East, more younger visitors felt more positively about their trip. Ratings declined incrementally eventually bottoming out among senior travelers.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to feel positively about their trip in terms of their expectations than males from these visitor markets.
- **Islands visited:** Among U.S. West visitors, those who visited a single island were more likely to feel their trip exceeded their expectations, compared to those who visited multiple islands.
- **Trips to HI:** First-time visitors were more likely to feel their trip exceeded their expectations compared to repeat visitors from both U.S. East and U.S. West.
- **Household income:** Travelers from both visitor markets who fell into the upper income tier of \$150K+ gave the lowest mean scores for their trip.

# SATISFACTION – HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



P= Preliminary Data

# SECTION 2 – ACTIVITIES



## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
<b>TOTAL</b>	95.2%	96.3%
<b>On own (self-guided)</b>	82.1%	82.9%
<b>Helicopter/ airplane</b>	4.0%	6.8%
<b>Boat/ submarine/ whale</b>	25.2%	35.6%
<b>Visit towns/communities</b>	50.6%	53.9%
<b>Limo/ van/ bus tour</b>	7.2%	12.2%
<b>Scenic views/ natural landmark</b>	58.4%	68.5%
<b>Movie/ TV/ film location</b>	3.8%	5.7%

# ACTIVITIES – RECREATION

	U.S. West	U.S. East
<b>TOTAL</b>	98.2%	97.7%
<b>Beach/ sunbathing</b>	90.8%	91.3%
<b>Bodyboarding</b>	15.2%	9.4%
<b>Standup paddle board</b>	8.3%	7.9%
<b>Surfing</b>	9.0%	10.5%
<b>Canoeing/ kayak</b>	9.6%	9.5%
<b>Swim in the ocean</b>	76.4%	74.1%
<b>Snorkeling</b>	53.9%	50.5%
<b>Freediving</b>	1.7%	1.8%
<b>Windsurf/ Kitesurf</b>	0.4%	0.4%
<b>Jet ski/ Parasail</b>	2.4%	3.0%
<b>Scuba diving</b>	3.2%	3.5%
<b>Fishing</b>	2.9%	3.7%
<b>Golf</b>	7.4%	6.3%

## ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
<b>TOTAL</b>	98.2%	97.7%
<b>Run/ Jog/ Fitness walk</b>	32.8%	28.9%
<b>Spa</b>	8.8%	8.9%
<b>Hiking</b>	47.8%	56.2%
<b>Backpack/ camp</b>	1.0%	2.6%
<b>Agritourism</b>	10.4%	13.4%
<b>Sport event/ tournament</b>	0.7%	0.5%
<b>Park/ botanical garden</b>	32.4%	41.9%
<b>Waterpark</b>	1.3%	0.9%
<b>Mountain tube/ waterfall rappel</b>	1.5%	1.8%
<b>Zip-lining</b>	5.4%	4.8%
<b>Skydiving</b>	0.4%	0.8%
<b>All terrain vehicle (ATV)</b>	4.3%	5.5%
<b>Horseback riding</b>	1.9%	3.1%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
<b>TOTAL</b>	99.2%	99.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.9%	27.6%
<b>Live music/ stage show</b>	20.0%	28.1%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.5%	6.6%
<b>Fine dining</b>	53.5%	54.2%
<b>Family restaurant</b>	62.9%	60.3%
<b>Fast food</b>	41.1%	41.4%
<b>Food truck</b>	43.2%	45.7%
<b>Café/ coffee house</b>	50.3%	50.0%
<b>Ethnic dining</b>	26.3%	30.0%
<b>Prepared own meal</b>	56.2%	46.6%

# ACTIVITIES – SHOPPING

	U.S. West	U.S. East
<b>TOTAL</b>	97.5%	97.5%
<b>Mall/ department store</b>	41.7%	41.6%
<b>Designer boutique</b>	17.0%	20.3%
<b>Hotel/ resort store</b>	33.4%	36.9%
<b>Swap meet/ flea market</b>	14.2%	14.8%
<b>Discount/ outlet store</b>	13.1%	15.8%
<b>Supermarket</b>	71.6%	62.9%
<b>Farmer's market</b>	36.8%	31.0%
<b>Convenience store</b>	54.8%	54.4%
<b>Duty free store</b>	3.2%	3.9%
<b>Local shop/ artisan</b>	61.2%	67.8%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
<b>TOTAL</b>	58.8%	71.7%
<b>Historic military site</b>	16.2%	28.1%
<b>Historic Hawaiian site</b>	28.1%	34.0%
<b>Other historical site</b>	11.5%	12.2%
<b>Art museums</b>	2.6%	2.3%
<b>Art gallery/ exhibition</b>	8.4%	7.8%
<b>Luau/ Polynesian show/ hula show</b>	19.3%	32.4%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	2.6%	3.9%
<b>Play/ concert/ theatre</b>	1.3%	1.0%
<b>Art/ craft fair</b>	6.1%	7.0%
<b>Festival event</b>	3.3%	2.1%

## ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East
<b>TOTAL</b>	91.3%	90.8%
<b>Airport shuttle</b>	14.7%	15.8%
<b>Trolley</b>	1.2%	1.0%
<b>Public bus</b>	5.5%	6.2%
<b>Tour bus/ tour van</b>	6.5%	10.4%
<b>Taxi/ limo</b>	13.0%	15.9%
<b>Rental car</b>	75.4%	72.1%
<b>Ride share</b>	18.6%	20.0%
<b>Bicycle rental</b>	3.6%	3.7%

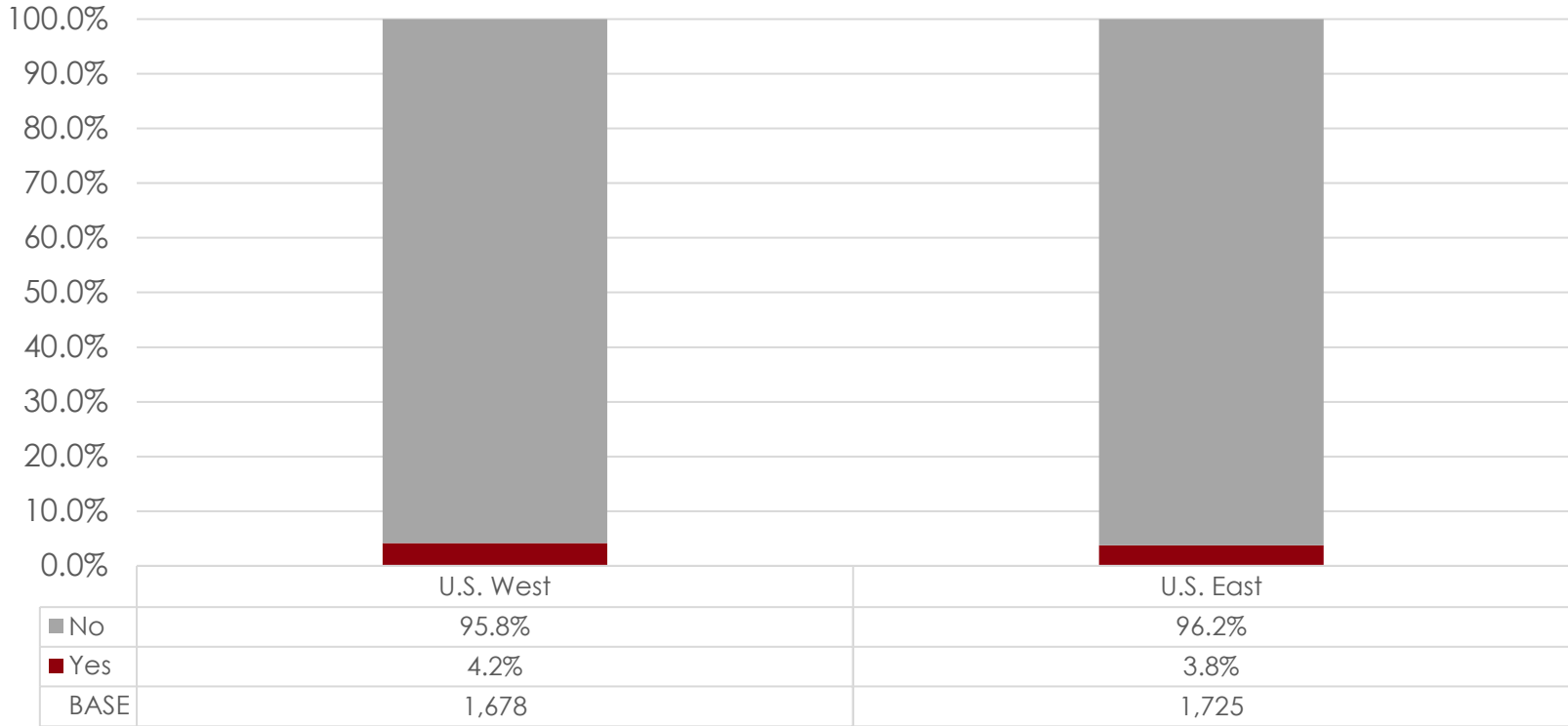
## ACTIVITIES – OTHER

	U.S. West	U.S. East
TOTAL	30.7%	28.8%
Visit friends/ family	29.7%	28.2%
Volunteer non-profit	1.3%	1.2%



# SECTION 3 – TRAVELERS WITH DISABILITIES

# DISABLED TRAVELER – REQUIRED ASSISTANCE

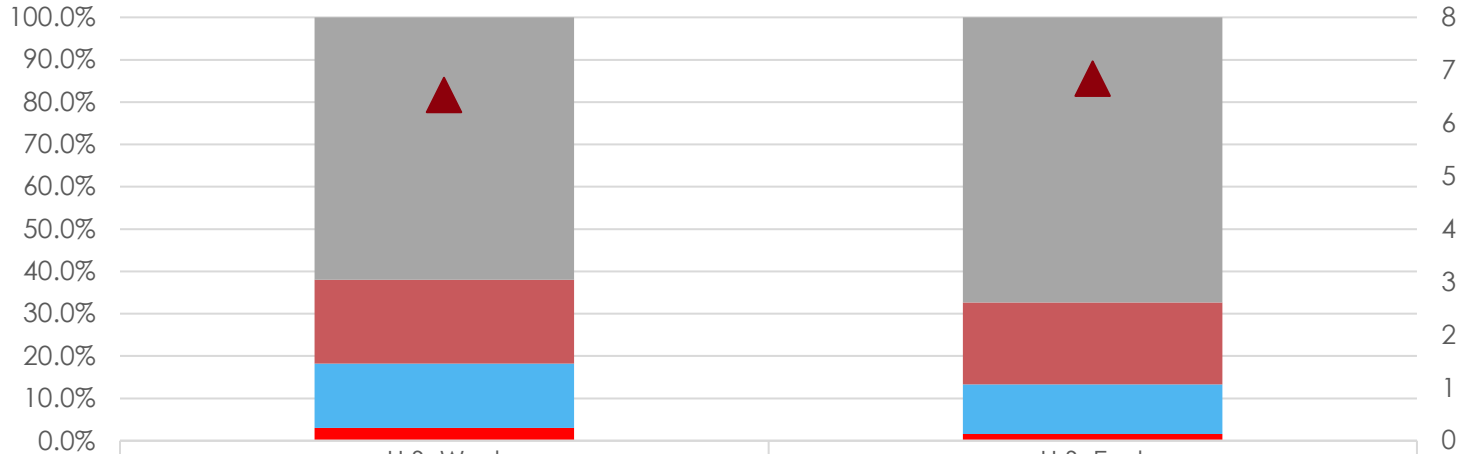


# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East
<b>Mobility aid (wheelchair, scooter, crutches, cane, etc.)</b>	72.0%	75.3%
<b>Personal assistance</b>	27.3%	22.8%
<b>Orientation and Mobility Assistance</b>	4.1%	6.0%
<b>NA- No one needed assistance</b>	4.5%	1.6%
<b>Lift equipped van</b>	1.6%	1.4%
<b>Service/ assistance animal</b>	1.4%	0.0%
<b>ASL Interpreter/ texting/ captioning</b>	0.0%	3.3%
<b>Respiratory equipment</b>	0.0%	1.6%
<b>Other</b>	7.0%	2.9%
<b>BASE</b>	71	66

# OVERALL ACCESSIBILITY – AIRPORTS

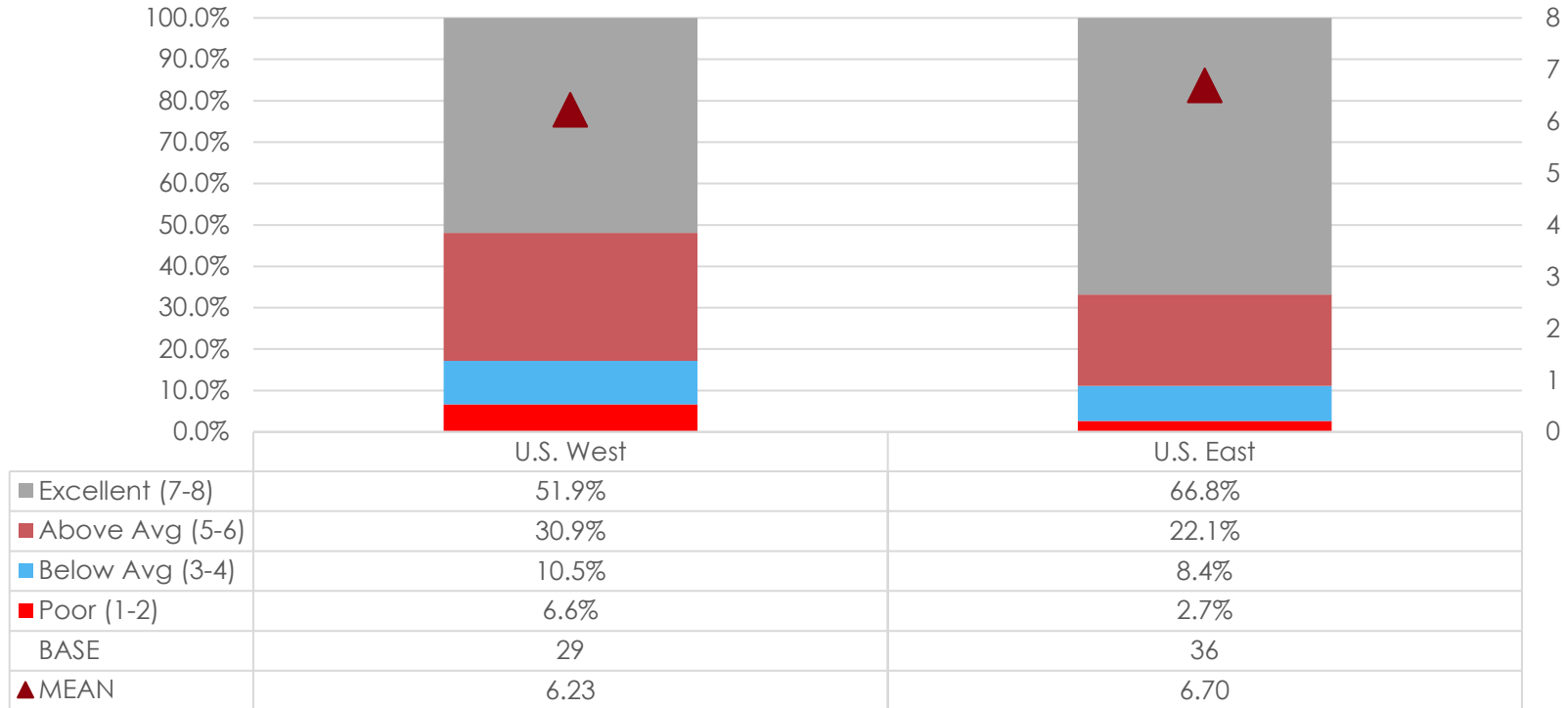
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	62.0%	67.3%
■ Above Avg (5-6)	19.8%	19.3%
■ Below Avg (3-4)	15.2%	11.8%
■ Poor (1-2)	3.0%	1.6%
BASE	70	61
▲ MEAN	6.53	6.84

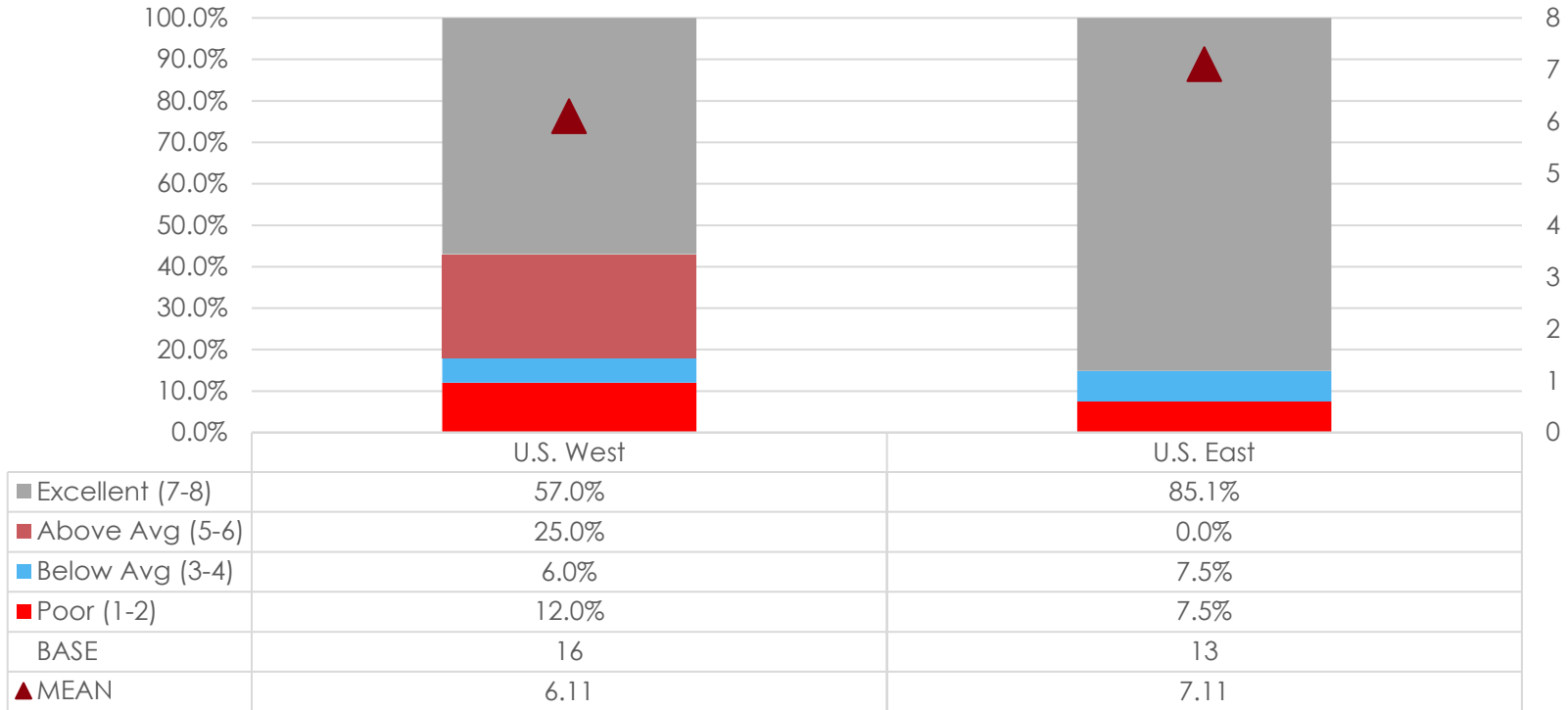
# OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

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



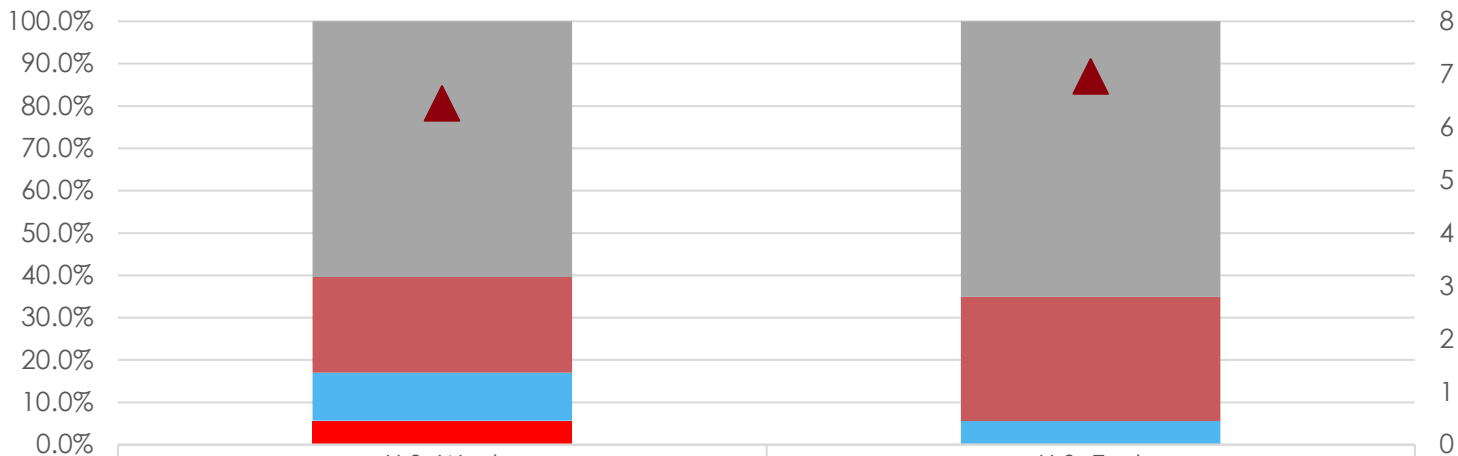
# OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



# OVERALL ACCESSIBILITY – RIDE SHARE

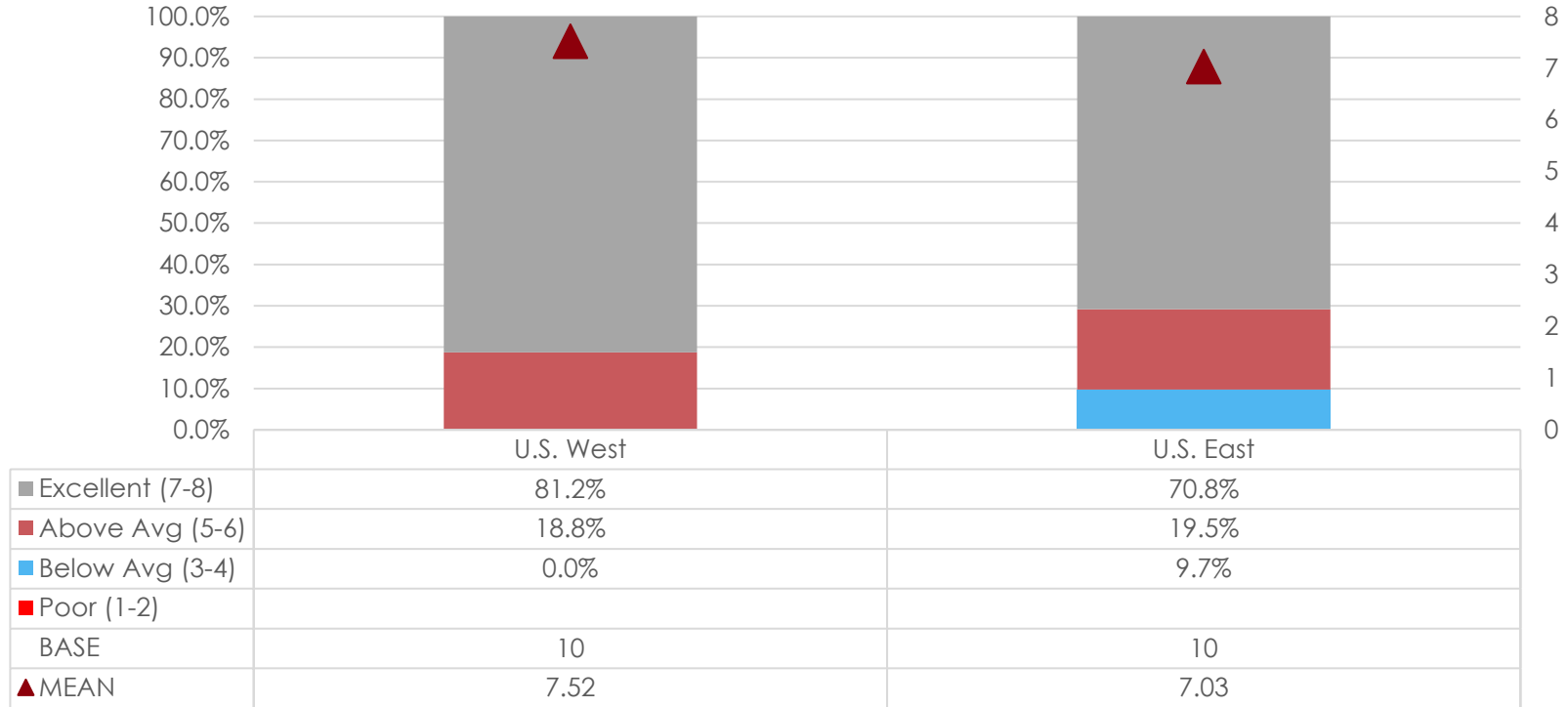
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	60.4%	65.1%
■ Above Avg (5-6)	22.6%	29.4%
■ Below Avg (3-4)	11.3%	5.6%
■ Poor (1-2)	5.7%	0.0%
BASE	17	17
▲ MEAN	6.45	6.96

# OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

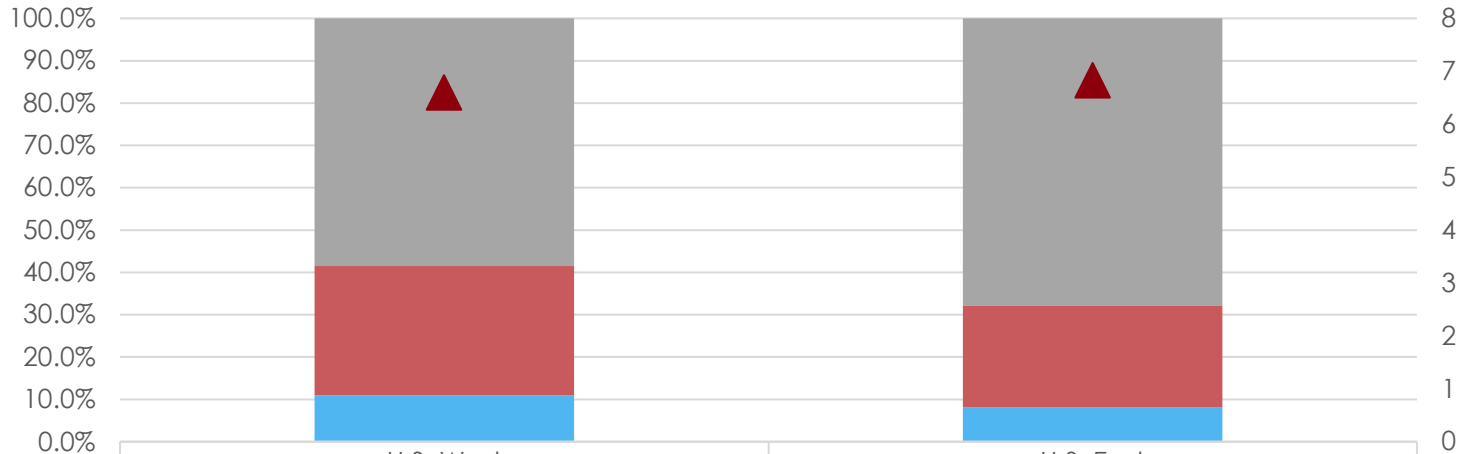
8-pt Rating Scale  
8=Excellent / 1=Poor





# OVERALL ACCESSIBILITY – HOTELS

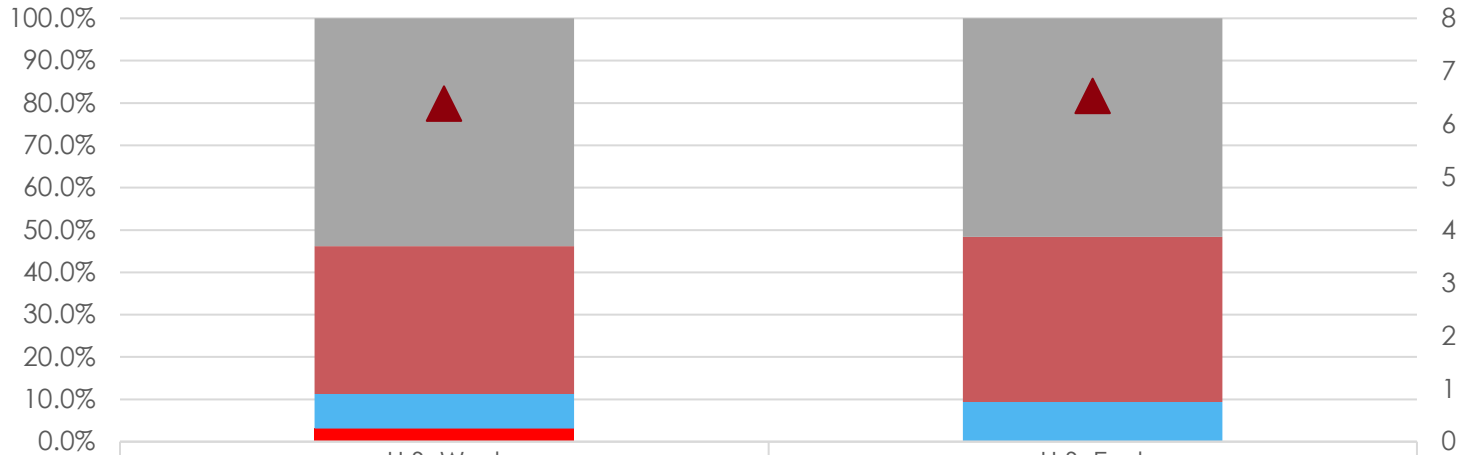
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	58.5%	67.8%
■ Above Avg (5-6)	30.5%	24.0%
■ Below Avg (3-4)	11.0%	8.2%
■ Poor (1-2)		
BASE	45	50
▲ MEAN	6.60	6.83

# OVERALL ACCESSIBILITY – RESTAURANTS

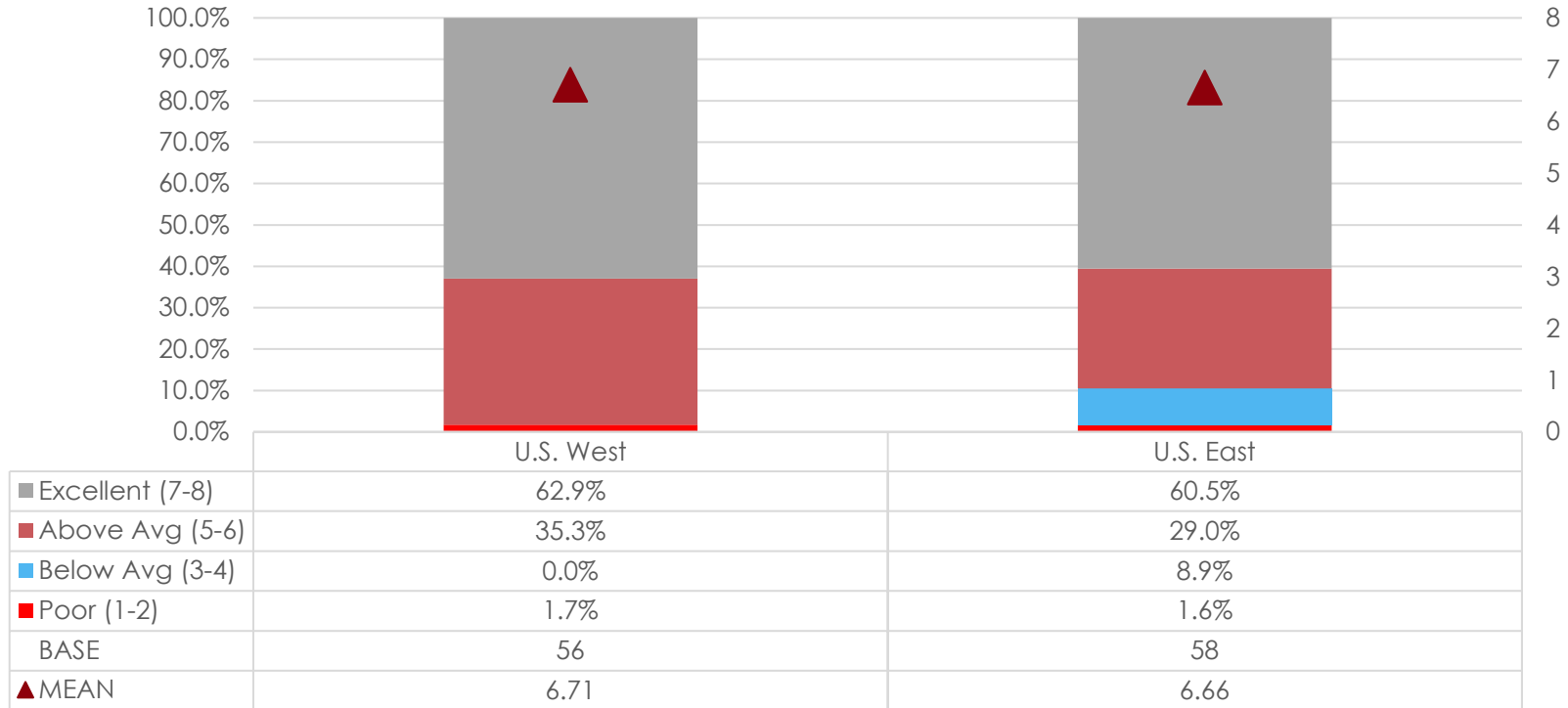
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	53.8%	51.6%
■ Above Avg (5-6)	34.9%	39.1%
■ Below Avg (3-4)	8.2%	9.3%
■ Poor (1-2)	3.1%	
BASE	63	64
▲ MEAN	6.39	6.54

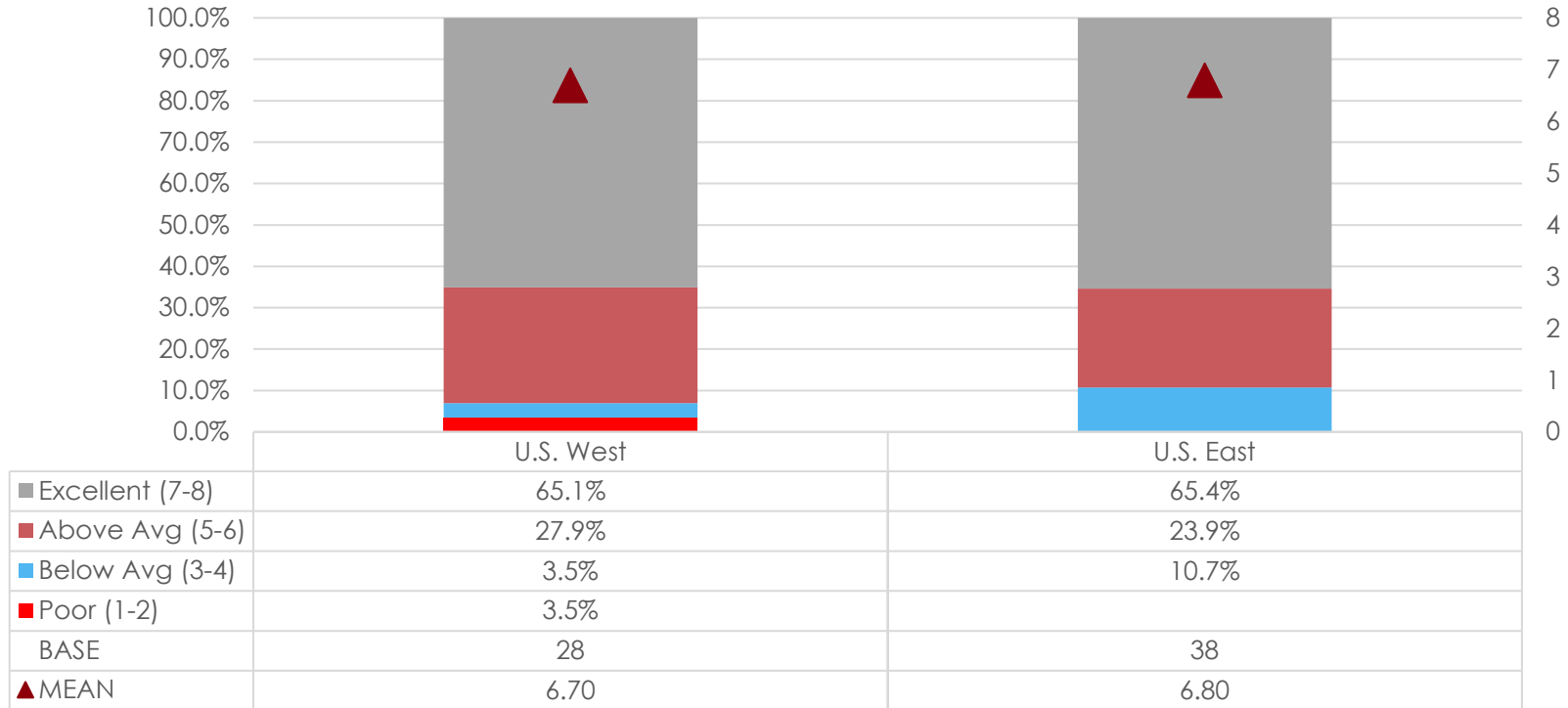
# OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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



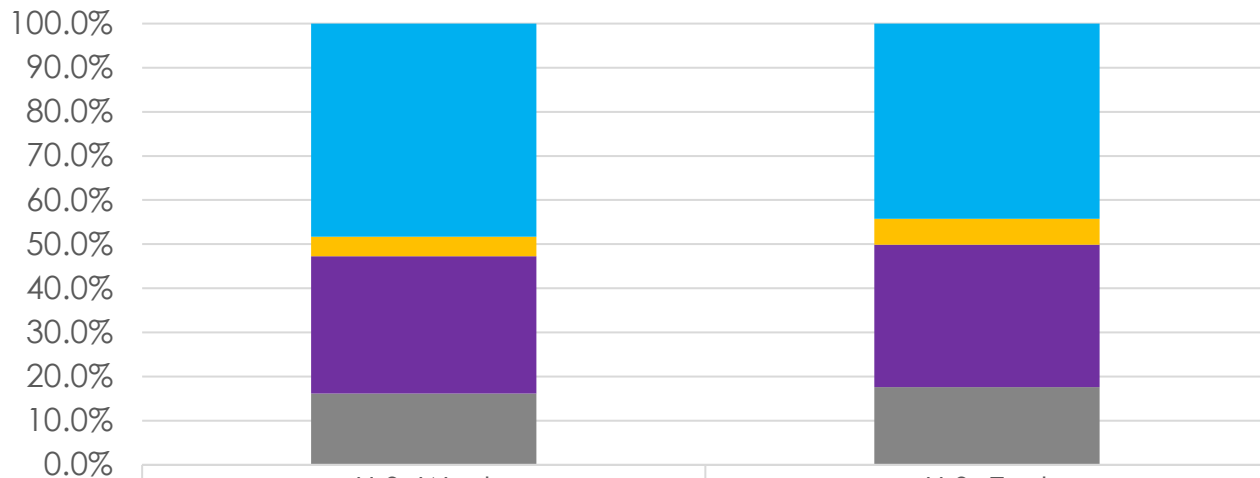
# OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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



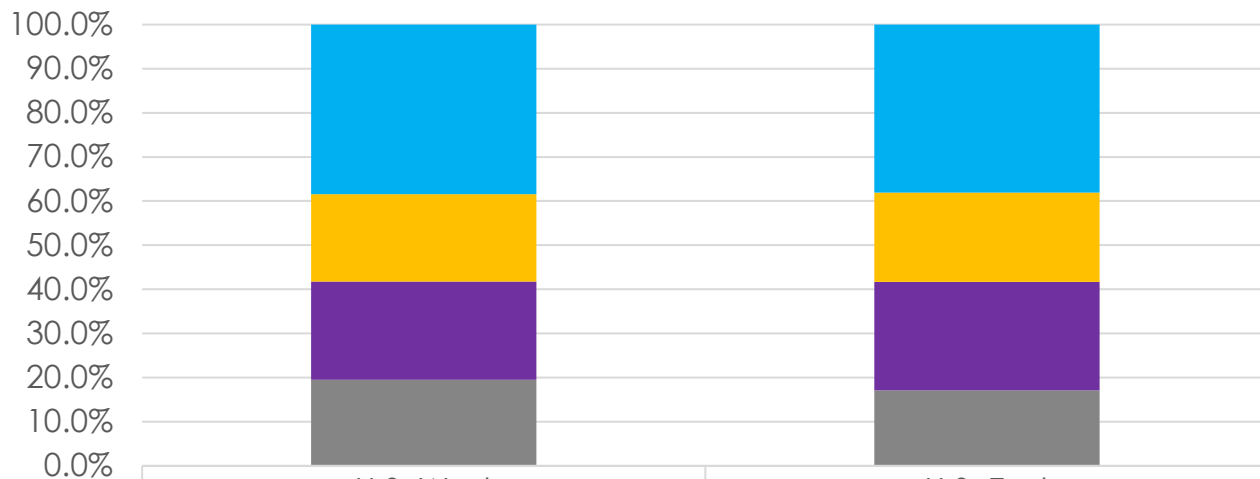
# SECTION 4 – ALTERNATIVE MESSAGING

# MESSAGING – “SAFE AND RESPONSIBLE TRAVEL”



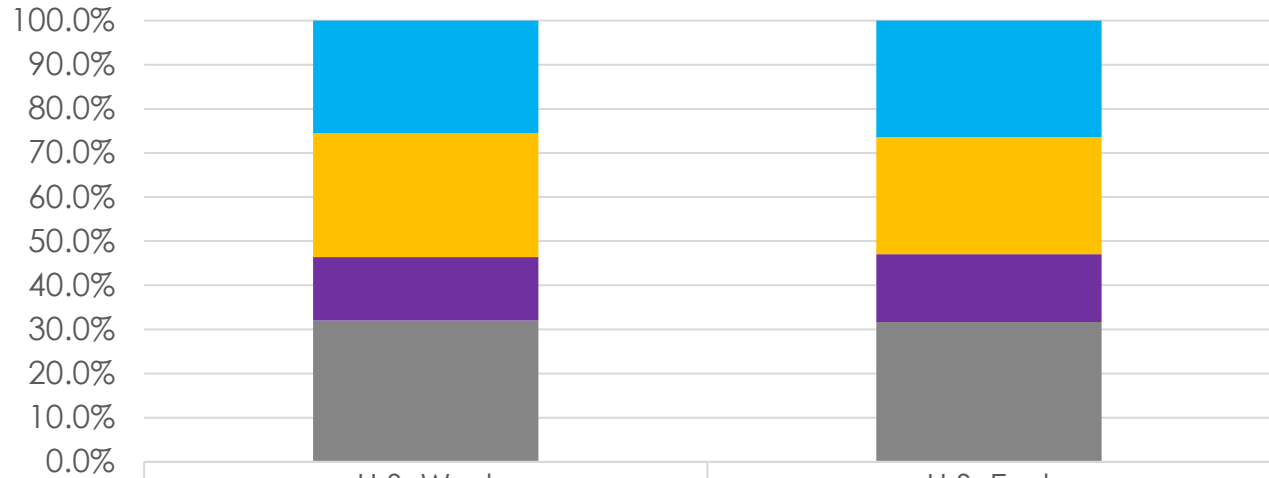
	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	48.3%	44.2%
■ YES- During trip	4.4%	5.9%
■ YES- Pre-arrival	31.1%	32.3%
■ NO	16.2%	17.6%
BASE	1678	1725

# MESSAGING – “CARING FOR AND RESPECTING HAWAI‘I’S CULTURE, PEOPLE, AND ENVIRONMENT”



	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	38.4%	38.1%
■ YES- During trip	19.8%	20.2%
■ YES- Pre-arrival	22.3%	24.6%
■ NO	19.5%	17.1%
BASE	1678	1725

# MESSAGING – “OCEAN AND HIKING SAFETY”



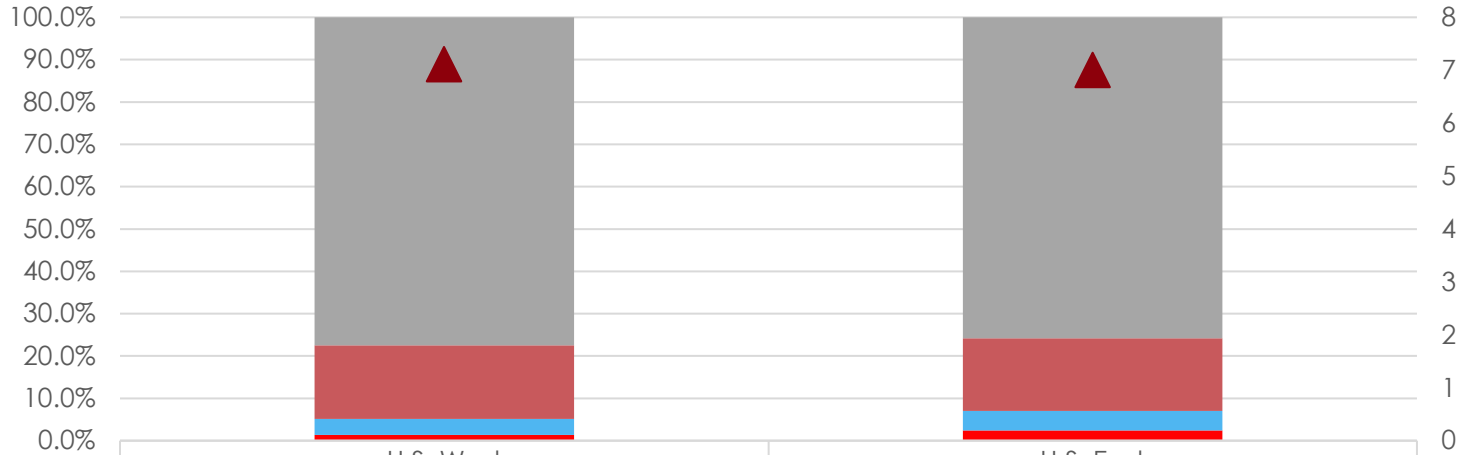
	U.S. West	U.S. East
YES- Pre-arrival/ During trip	25.6%	26.4%
YES- During trip	28.0%	26.6%
YES- Pre-arrival	14.4%	15.3%
NO	32.1%	31.7%
BASE	1678	1725



# SECTION 5 – O'AHU

# SATISFACTION – O‘AHU

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



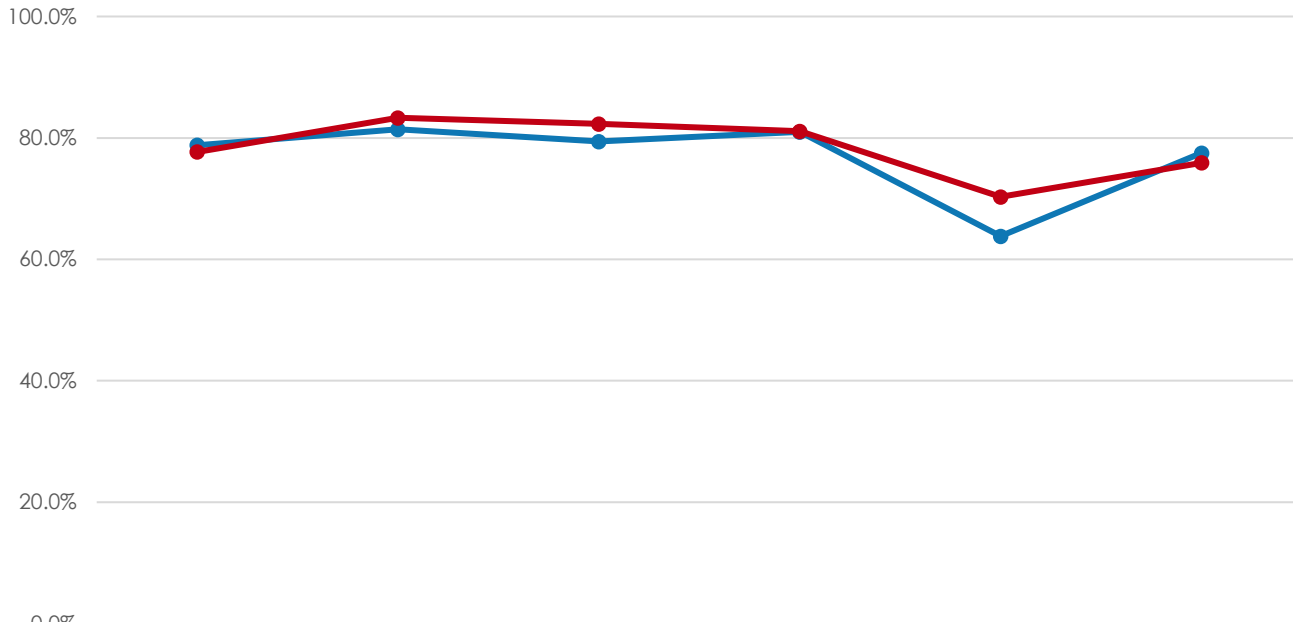
	U.S. West	U.S. East
■ Excellent (7-8)	77.5%	75.9%
■ Above Avg (5-6)	17.3%	17.1%
■ Below Avg (3-4)	3.8%	4.6%
■ Poor (1-2)	1.4%	2.4%
BASE	715	910
▲ MEAN	7.12	7.01

# SATISFACTION – O‘AHU

- **Age:** Younger travelers under the age of 35 from U.S. West were the most satisfied with their stay on O‘ahu. At the opposite end, senior travelers in both visitor markets provided the lowest scores.
- **College graduates:** Among visitors from U.S. West, those without a college degree provided higher mean scores.
- **Gender:** Female visitors from both U.S. West and U.S. East were more satisfied with their stay on O‘ahu than males from these visitor markets.
- **Trips to Hawai‘i:** Those who indicate this is their first trip to the state from U.S. West gave higher satisfaction scores compared to repeat visitors.
- **O‘ahu Only Visitors:** Visitors from U.S. West whose trip consisted of visiting just O‘ahu were more satisfied with their stay on island, compared to those whose trip also included visits to at least one Neighbor Island.

# SATISFACTION – O‘AHU

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

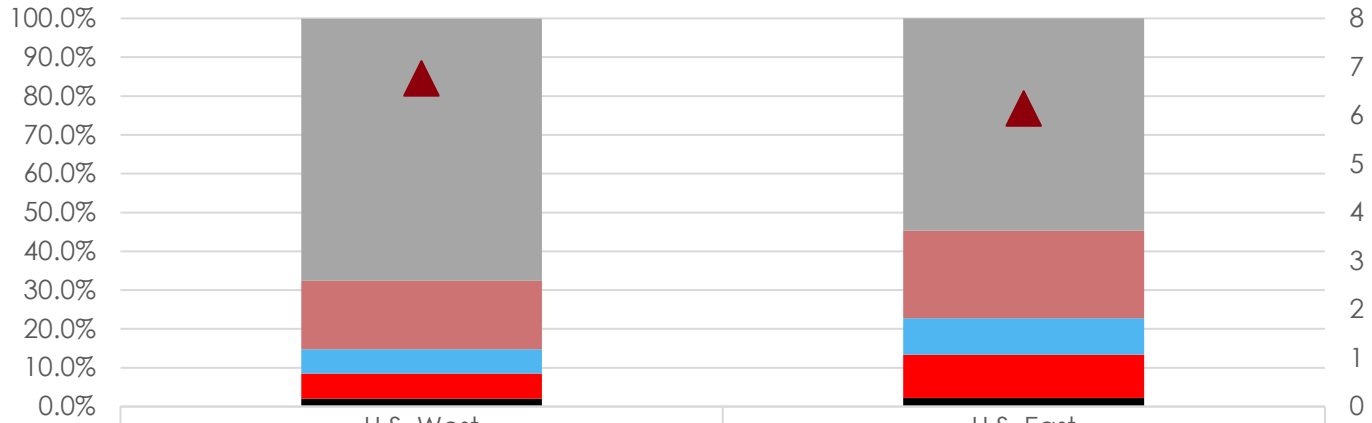


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	78.8%	81.4%	79.4%	81.0%	63.8%	77.5%
U.S. East	77.7%	83.3%	82.3%	81.1%	70.3%	75.9%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – O‘AHU

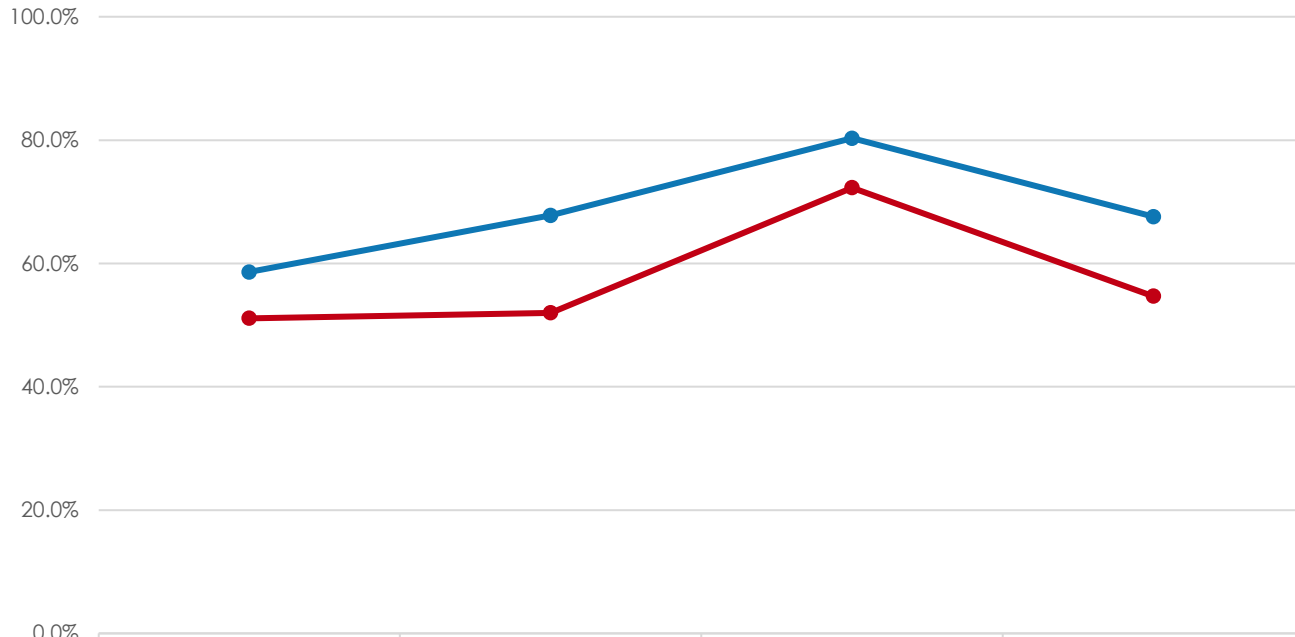
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	67.6%	54.7%
Somewhat likely (5-6)	17.7%	22.6%
Somewhat unlikely (3-4)	6.2%	9.4%
Very unlikely (1-2)	6.4%	11.1%
Not sure	2.1%	2.2%
BASE	679	812
▲ MEAN	6.76	6.14

# LIKELIHOOD OF RETURN VISIT – O‘AHU

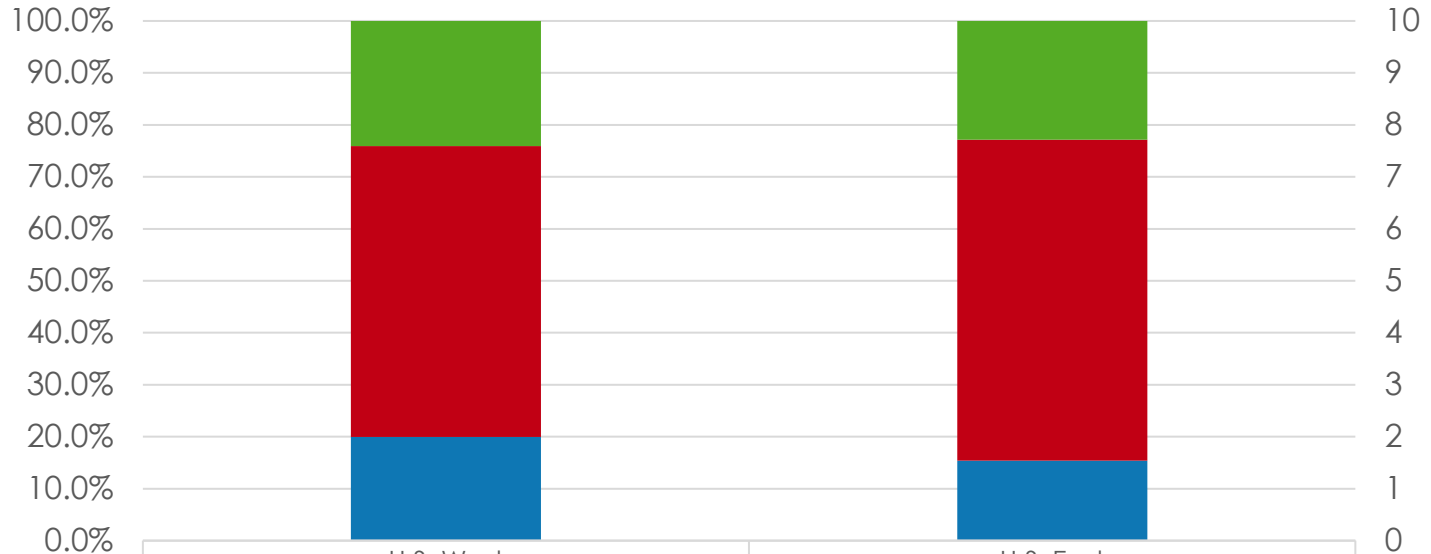
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	58.6%	67.8%	80.3%	67.6%
U.S. East	51.1%	52.0%	72.3%	54.7%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
■ Aided Ad Awareness	24.1%	22.9%
■ No Prior Awareness	56.0%	61.8%
■ Unsure	20.0%	15.4%
BASE	679	812

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
<b>Atlantis Submarine &amp; Cruises</b>	1.6%	3.2%
<b>Bernice P. Bishop Museum</b>	3.2%	3.2%
<b>Byodo-In Temple</b>	10.6%	12.1%
<b>Chinatown &amp; Honolulu Art District</b>	14.8%	11.3%
<b>Diamond Head State Monument</b>	32.0%	39.6%
<b>Dole Plantation</b>	31.8%	36.9%
<b>Haleiwa</b>	32.1%	27.6%
<b>Hanauma Bay Nature Reserve</b>	12.8%	11.9%
<b>Harold L. Lyon Arboretum</b>	0.8%	0.9%
<b>Hawai‘i State Art Museum</b>	1.7%	1.0%
<b>Honolulu Museum of Art</b>	2.2%	1.5%
<b>Hawaiian Mission Houses, Historic Site and Archive</b>	0.6%	1.6%
<b>Hawai‘i’s Plantation Village</b>	2.1%	2.9%
<b>Honolulu Zoo</b>	8.9%	8.9%



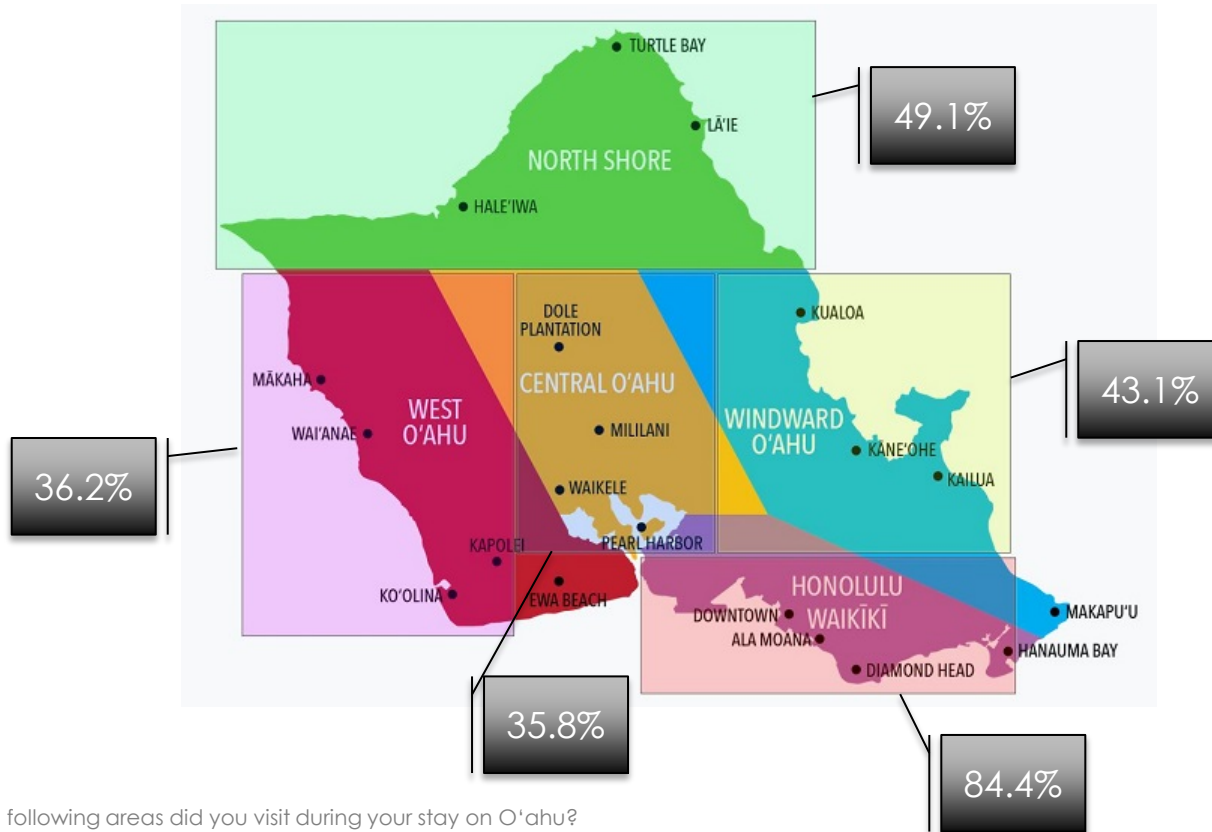
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Ho‘omaluhia Botanical Garden</b>	7.3%	7.9%
<b>Iolani Palace State Monument</b>	4.8%	8.1%
<b>Kaiwi State Scenic Shoreline/ Makapu‘u Trail</b>	5.8%	7.7%
<b>Kakaako Street Art</b>	2.1%	2.2%
<b>Koko Head Crater Trail</b>	7.7%	11.0%
<b>Kualoa Private Nature Reserve</b>	15.2%	14.5%
<b>Lanikai or Kailua Beach</b>	38.1%	36.6%
<b>Manoa Falls &amp; Trail</b>	7.2%	10.7%
<b>National Memorial Cemetery of the Pacific</b>	7.2%	12.6%
<b>Nuuanu Pali Lookout</b>	12.2%	15.6%
<b>North Shore Beaches</b>	52.8%	58.9%

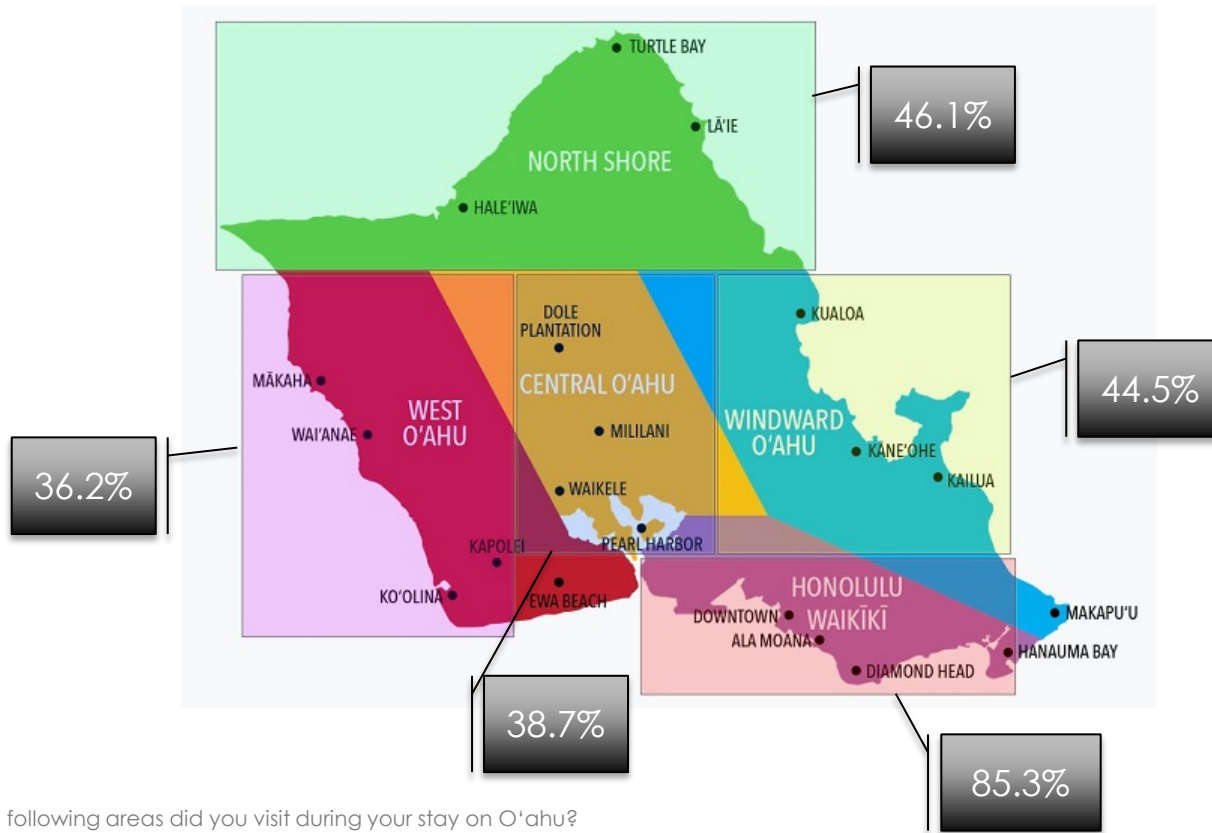
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Pearl Harbor</b>	31.5%	48.5%
<b>Polynesian Cultural Center</b>	15.1%	13.7%
<b>Queen Emma’s Summer Palace</b>	1.3%	1.8%
<b>Sea Life Park Hawai‘i</b>	4.0%	3.8%
<b>Waikiki Aquarium</b>	1.8%	1.5%
<b>Waimanalo Beach Park</b>	14.0%	13.8%
<b>Waimea Valley</b>	21.6%	21.9%

# AREAS VISITED U.S. WEST

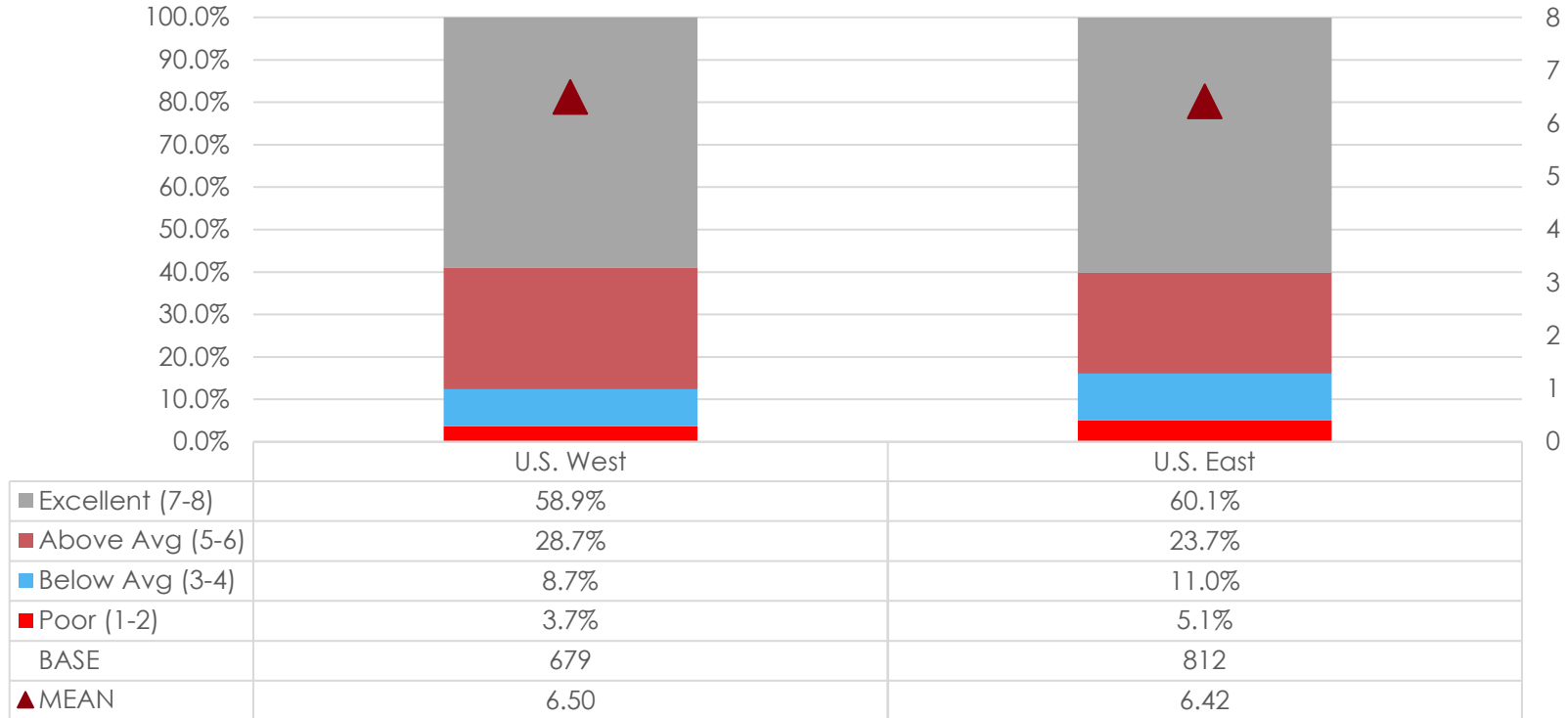


# AREAS VISITED U.S. EAST

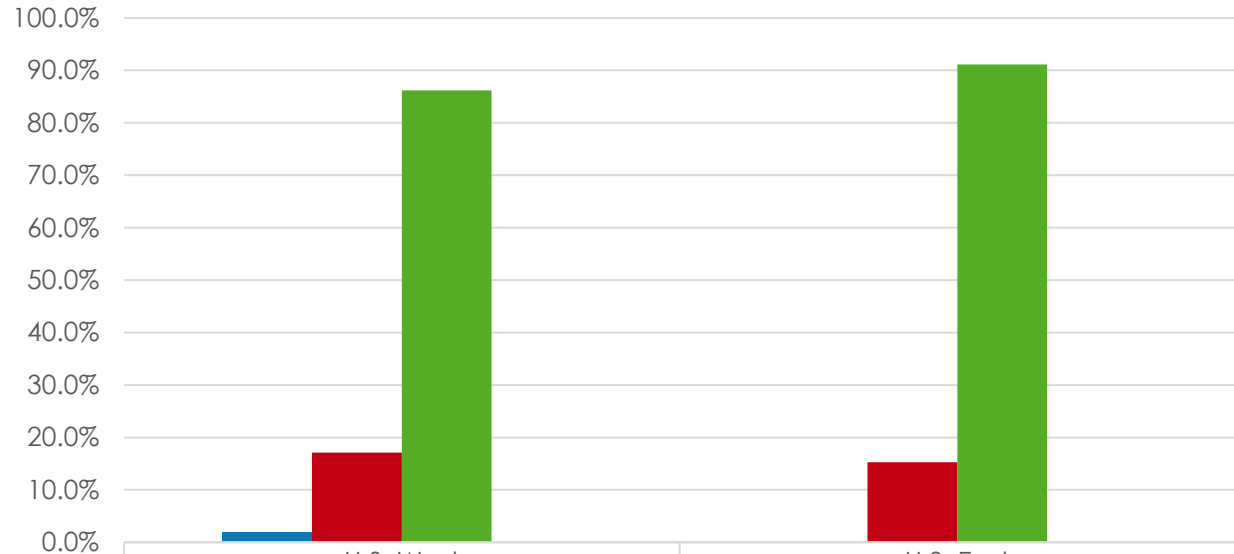


# SATISFACTION – Daniel K. Inouye International Airport

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



# SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ Neither of these	1.9%	
■ Full-face snorkel mask	17.1%	15.3%
■ 2-Piece, separate mask & snorkel	86.2%	91.1%
BASE	283	299

# SNORKELING OCEAN SAFETY – O‘AHU

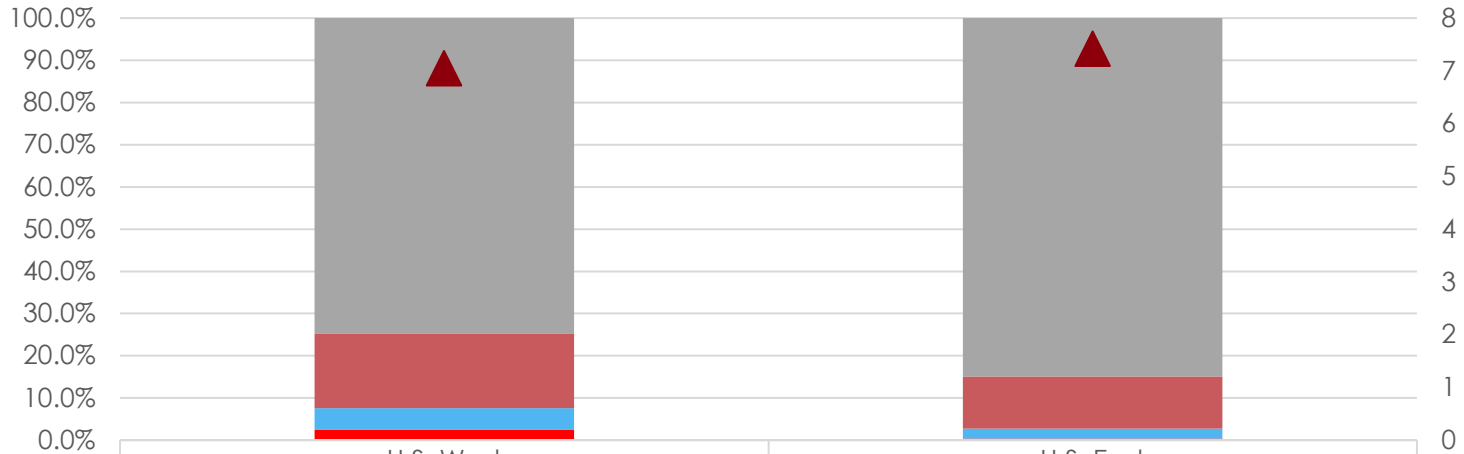
	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	97.0%	98.3%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	2.3%	1.0%
<b>Yes, while snorkeling using a full-face mask</b>	0.7%	0.7%
<b>BASE</b>	278	299

# SECTION 6 – KAUA‘I



# SATISFACTION – KAUA‘I

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



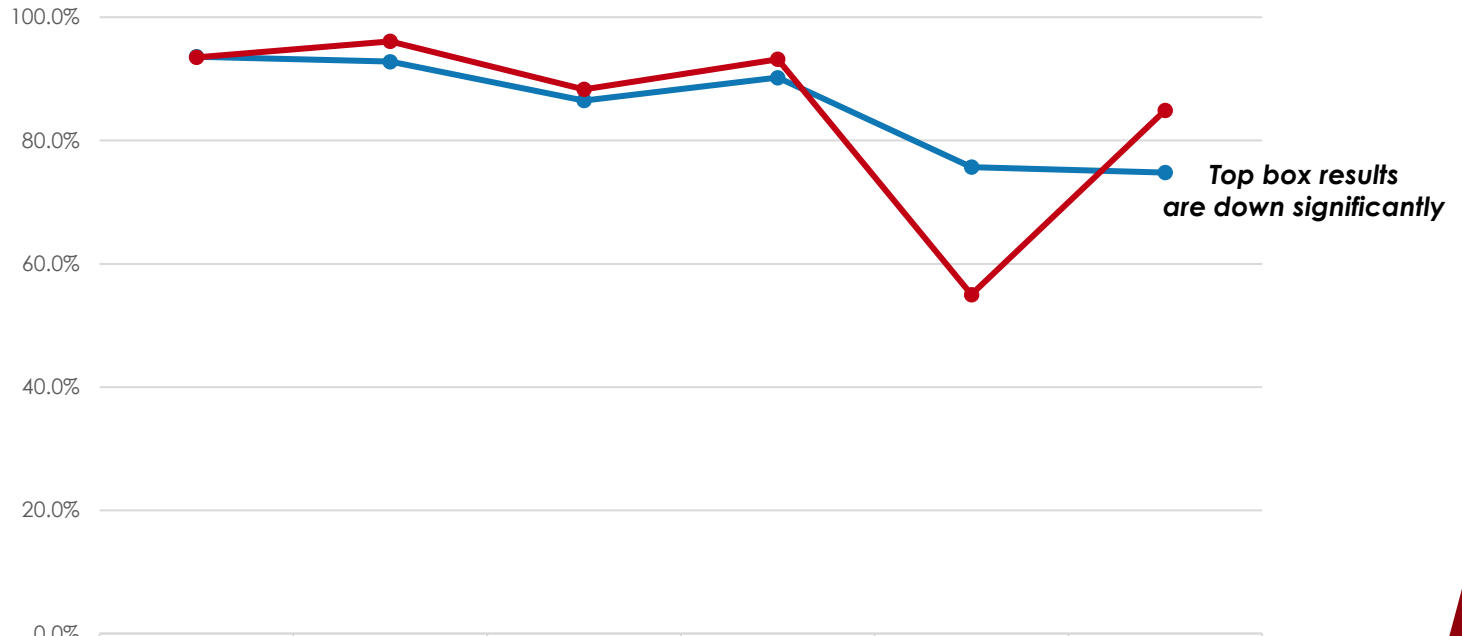
	U.S. West	U.S. East
■ Excellent (7-8)	74.8%	84.9%
■ Above Avg (5-6)	17.6%	12.4%
■ Below Avg (3-4)	5.1%	2.3%
■ Poor (1-2)	2.4%	0.4%
BASE	214	248
▲ MEAN	7.05	7.42

# SATISFACTION – KAUA‘I

- **Gender:** Among travelers from U.S. West, females gave higher mean satisfaction scores for their trip compared to males from this visitor market.
- **Kaua‘i Only:** Those whose trip to the state consisted of visiting just Kaua‘i gave higher satisfaction scores for the island compared to those who visited multiple islands during their stay.

# SATISFACTION – KAUA‘I

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

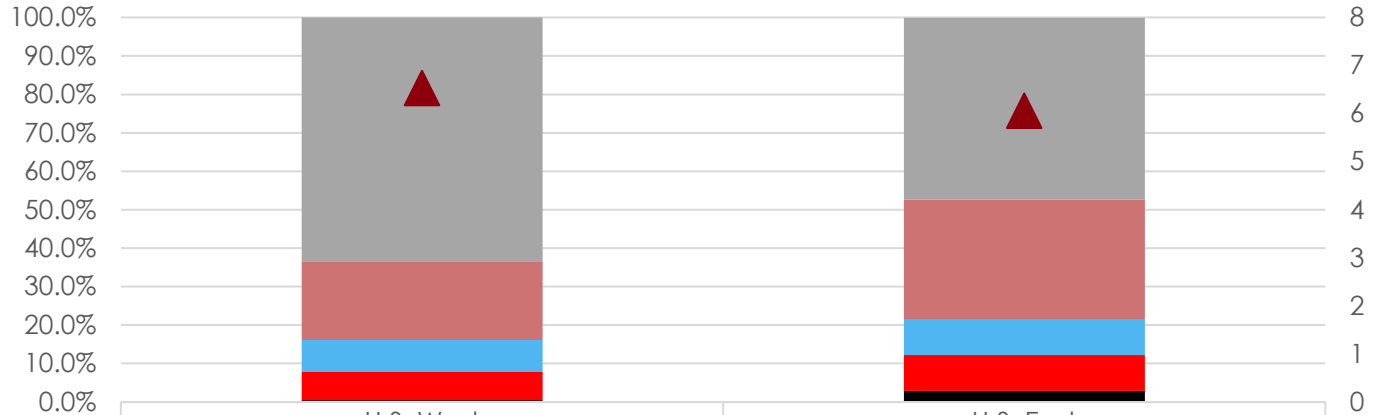


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	93.6%	92.8%	86.5%	90.2%	75.7%	74.8%
U.S. East	93.5%	96.1%	88.3%	93.2%	55.0%	84.9%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

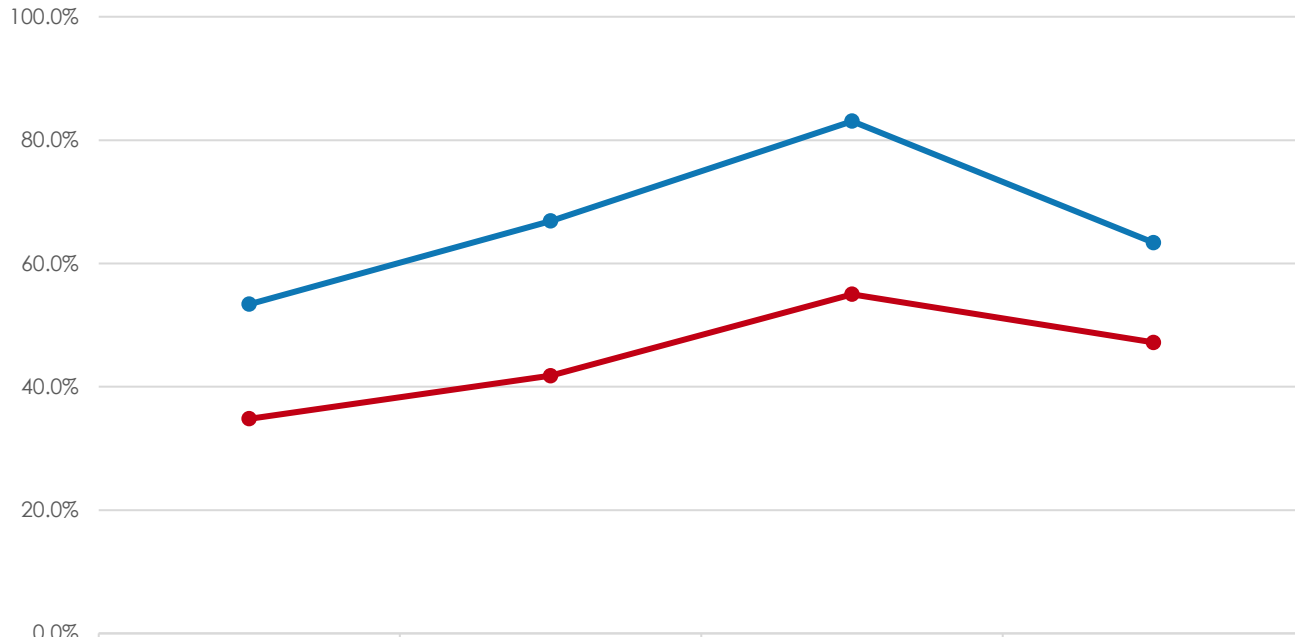
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	63.4%	47.2%
■ Somewhat likely (5-6)	20.5%	31.3%
■ Somewhat unlikely (3-4)	8.3%	9.2%
■ Very unlikely (1-2)	7.3%	9.3%
■ Not sure	0.5%	2.9%
BASE	214	248
▲ MEAN	6.53	6.06

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

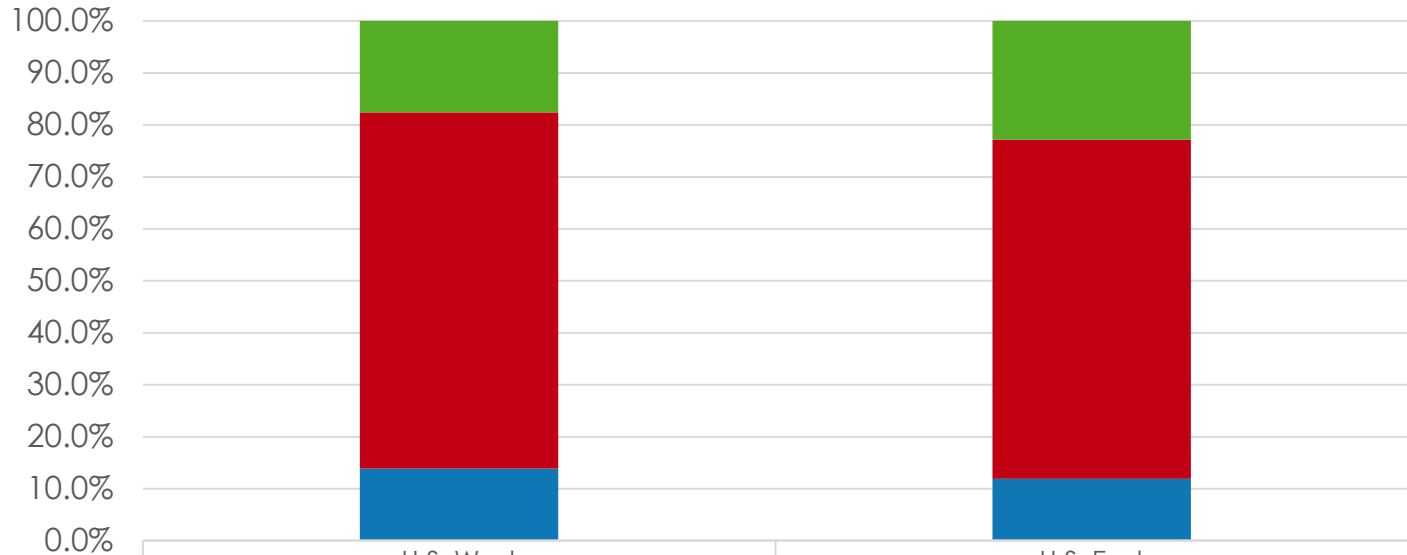
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	53.4%	66.9%	83.1%	63.4%
U.S. East	34.8%	41.8%	55.0%	47.2%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East
■ Aided Ad Awareness	17.6%	22.8%
■ No Prior Awareness	68.5%	65.2%
■ Unsure	13.9%	11.9%
BASE	214	248

# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
<b>Fern Grotto</b>	9.0%	8.8%
<b>Hanalei Town</b>	44.2%	46.6%
<b>Hanalei Beach</b>	40.9%	45.3%
<b>Kalapaki Beach</b>	25.4%	27.8%
<b>Kalalau Trail</b>	12.4%	18.4%
<b>Bike Path in Kapaa</b>	13.7%	10.3%
<b>Kaua‘i Museum</b>	1.8%	2.4%
<b>Ke'e Beach</b>	7.7%	10.4%
<b>Kilauea Lighthouse</b>	32.6%	32.2%
<b>Koke'e</b>	11.3%	16.2%

## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
<b>Koke'e Museum</b>	3.7%	2.0%
<b>Na Aina Kai Gardens</b>	0.9%	0.4%
<b>Napali Coast</b>	40.5%	56.3%
<b>Allerton Garden</b>	7.0%	6.7%
<b>Limahuli Garden</b>	2.8%	4.1%
<b>Old Koloa Town</b>	50.1%	32.7%
<b>Opaeka'a Falls</b>	24.5%	28.3%
<b>Po'ipu Beach</b>	75.3%	63.8%
<b>Smith's Tropical Paradise Gardens</b>	1.4%	4.1%
<b>Spouting Horn</b>	43.8%	34.8%
<b>Wailua Falls</b>	43.1%	48.5%

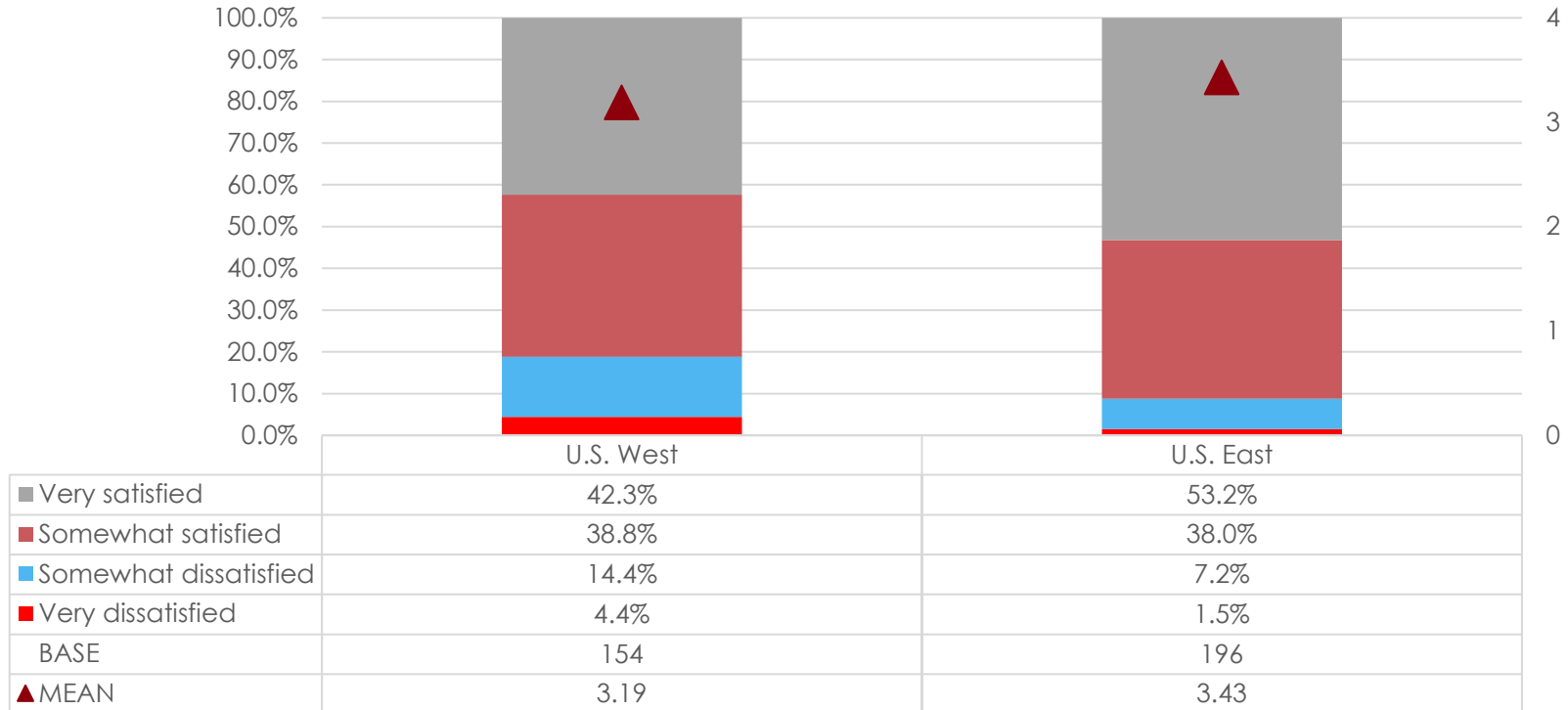


## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	24.0%	25.3%
Waimea Canyon	53.6%	65.5%
Disc Golf	0.9%	1.2%
Mini Golf	4.2%	1.6%

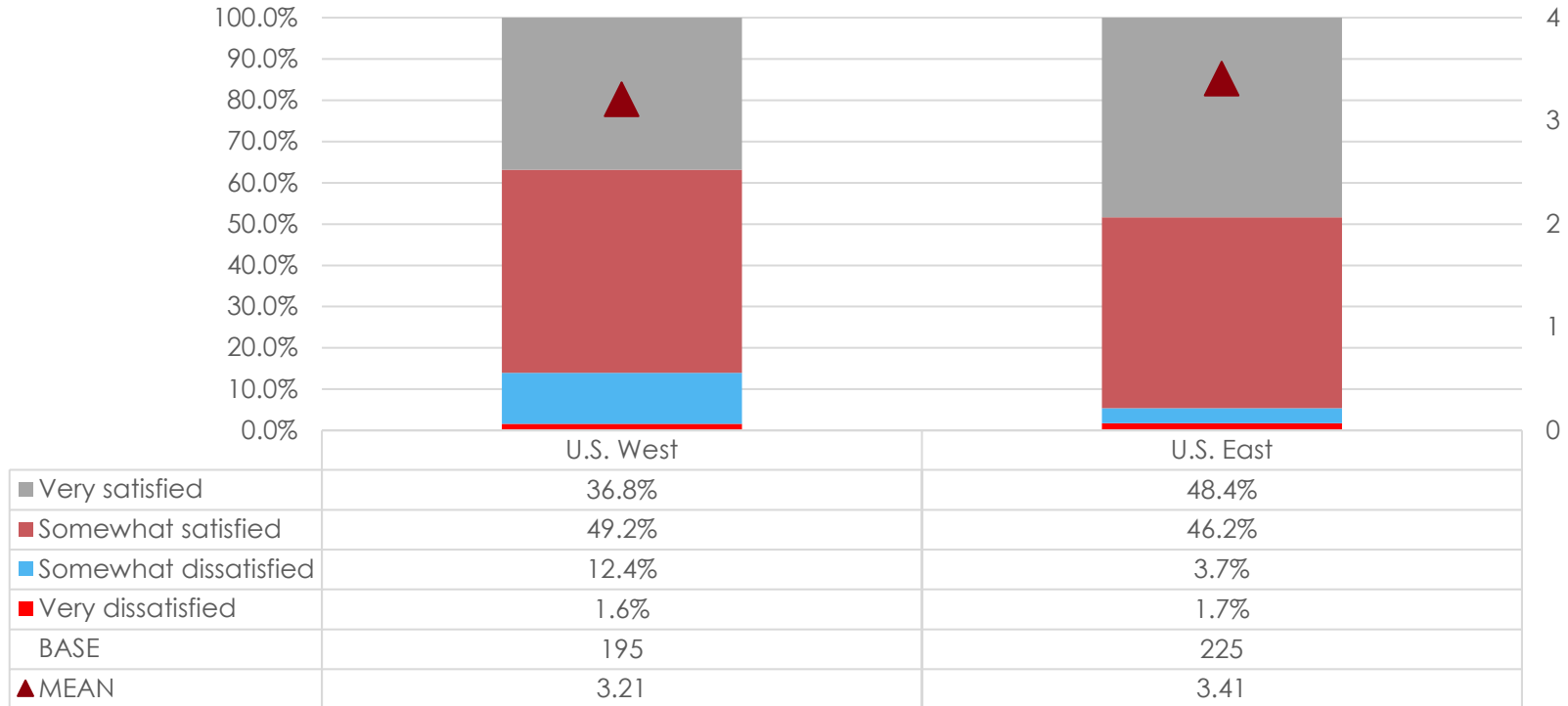
# SATISFACTION – ENTERTAINMENT

4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied



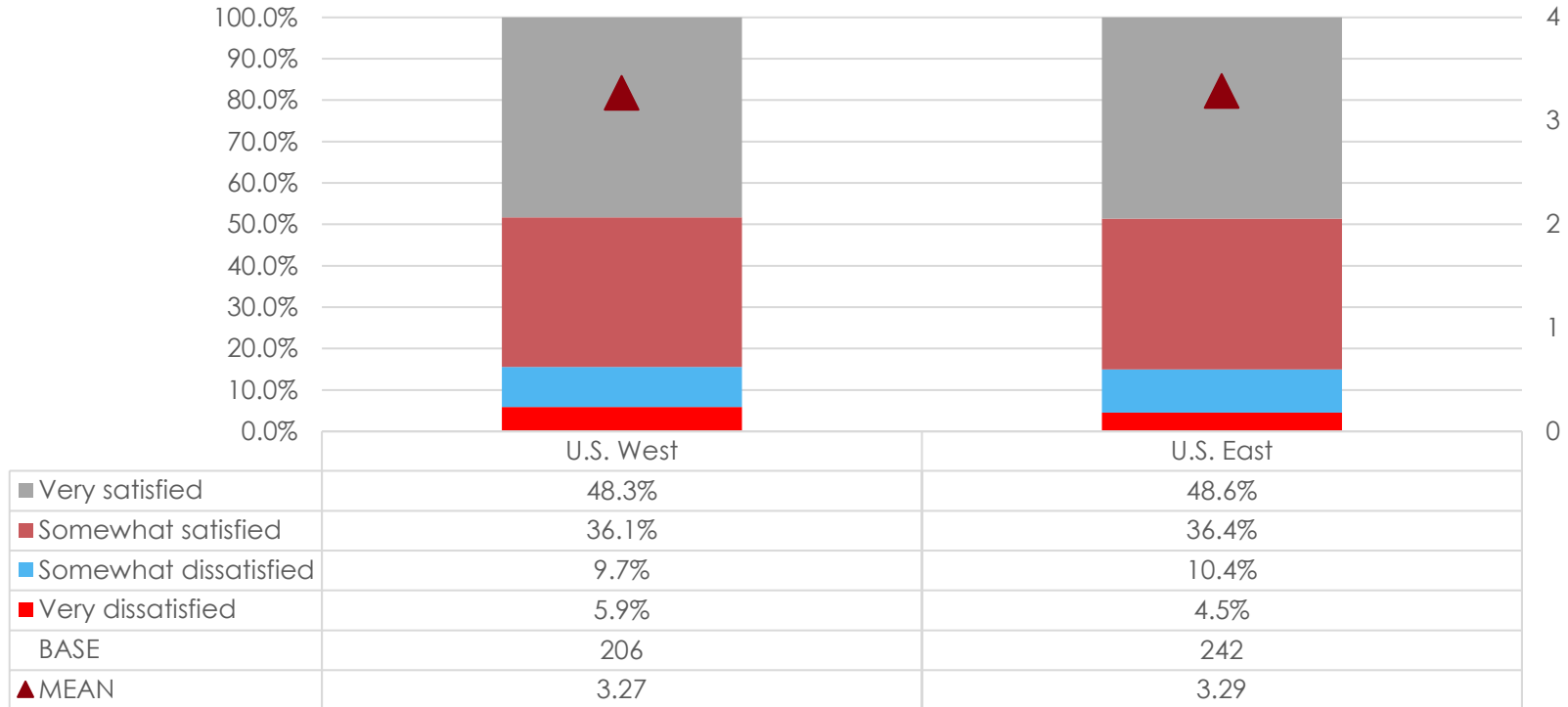
# SATISFACTION – SHOPPING

4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied



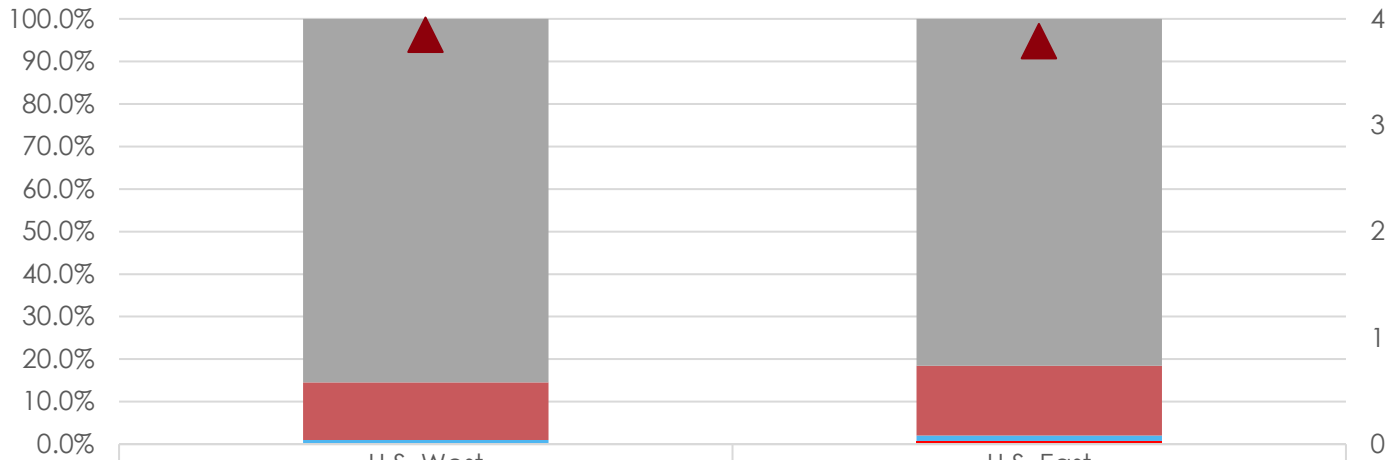
# SATISFACTION – DINING

4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied



# SATISFACTION – BEACHES

4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied

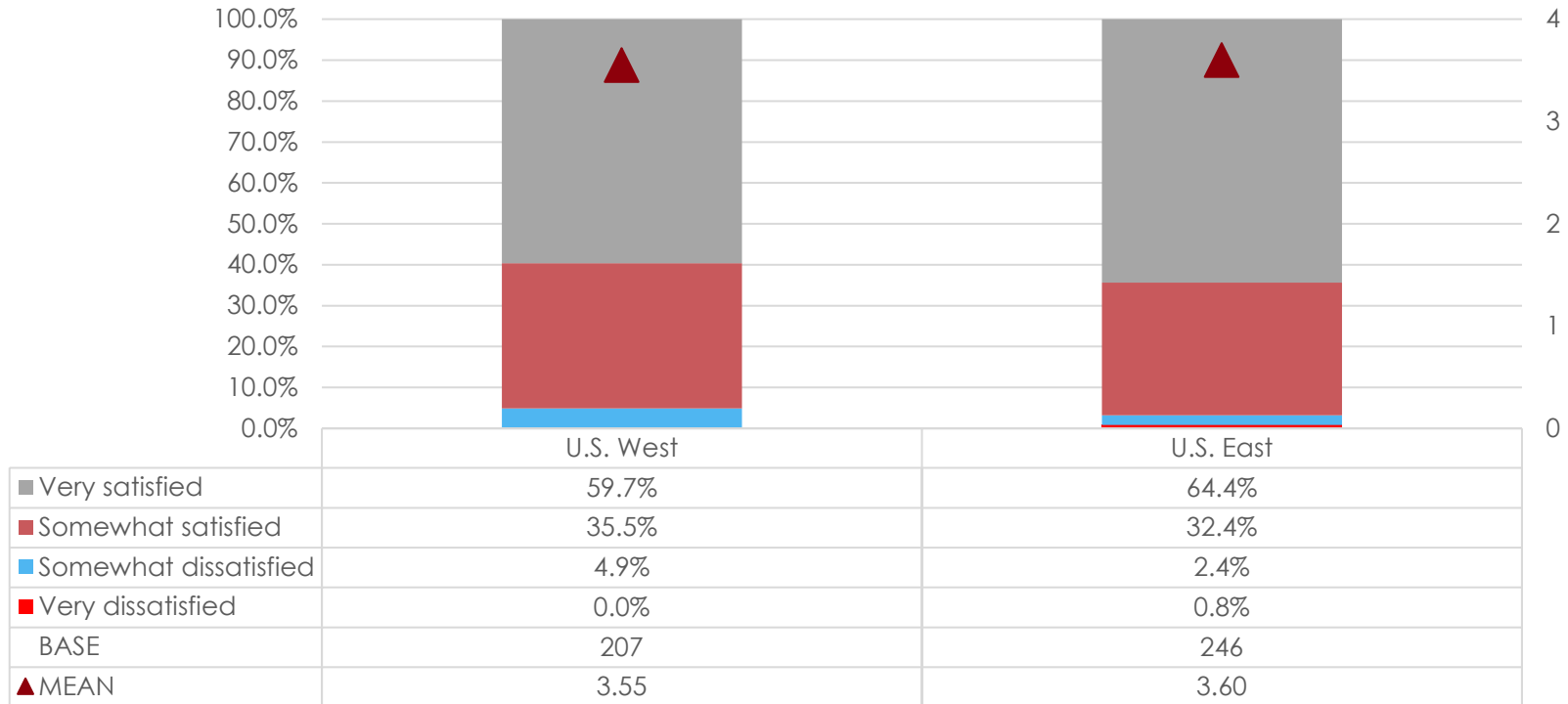


	U.S. West	U.S. East
Very satisfied	85.5%	81.6%
Somewhat satisfied	13.5%	16.5%
Somewhat dissatisfied	1.0%	1.2%
Very dissatisfied	0.0%	0.8%
BASE	206	244
MEAN	3.85	3.79



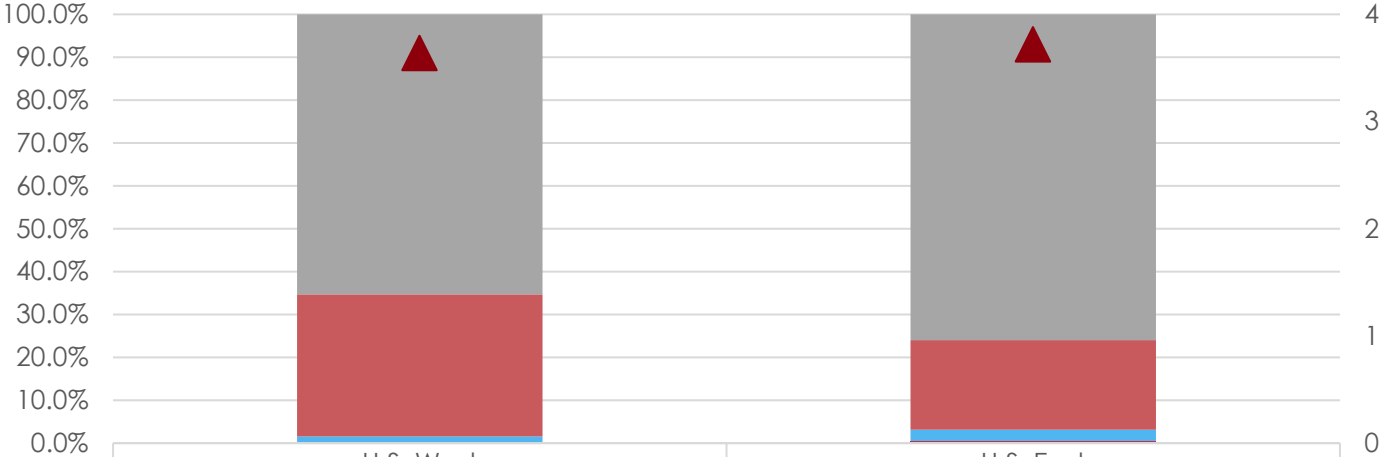
# SATISFACTION – PUBLIC AREAS

4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied



# SATISFACTION – PARKS

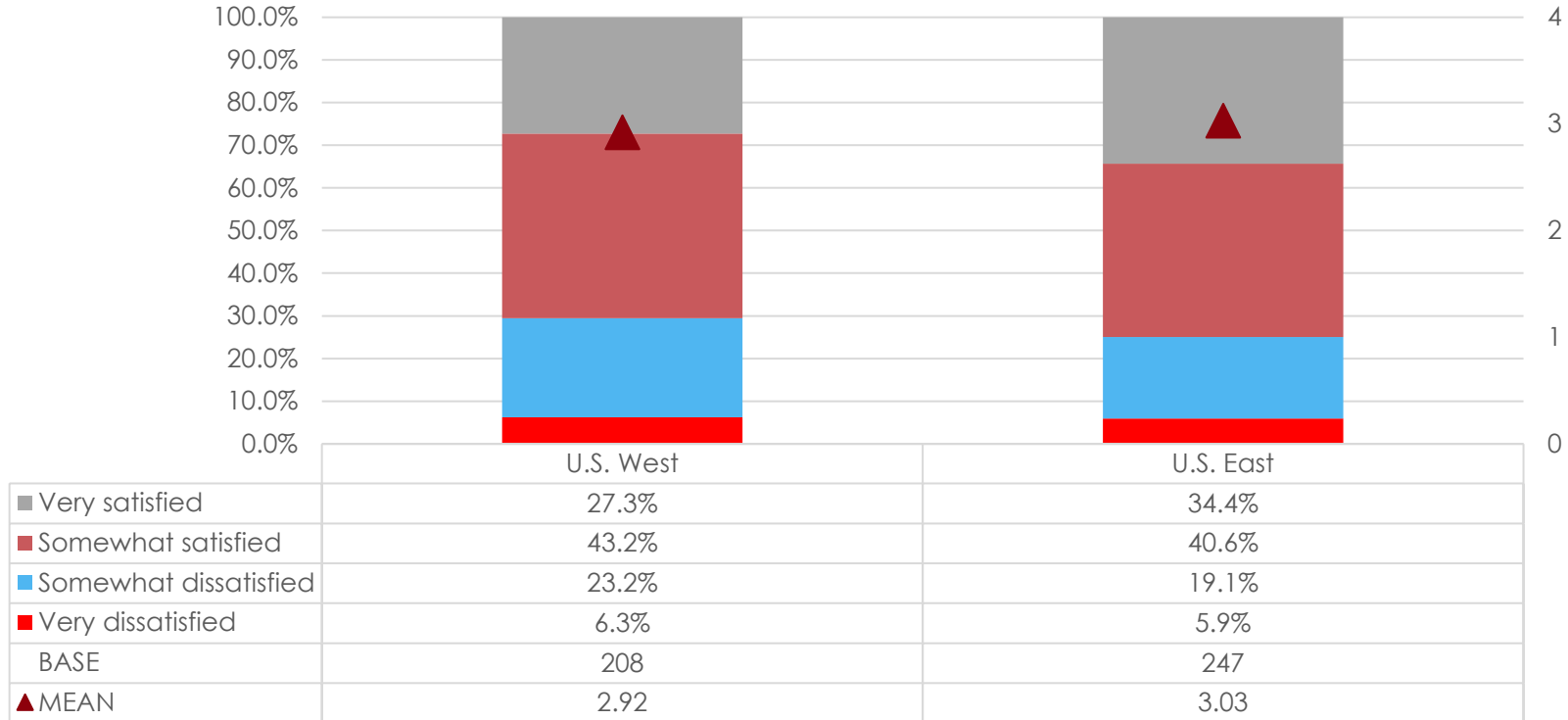
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied



	U.S. West	U.S. East
■ Very satisfied	65.3%	75.9%
■ Somewhat satisfied	33.1%	20.9%
■ Somewhat dissatisfied	1.6%	2.7%
■ Very dissatisfied	0.0%	0.4%
BASE	189	225
▲ MEAN	3.64	3.72

# SATISFACTION – ROADS

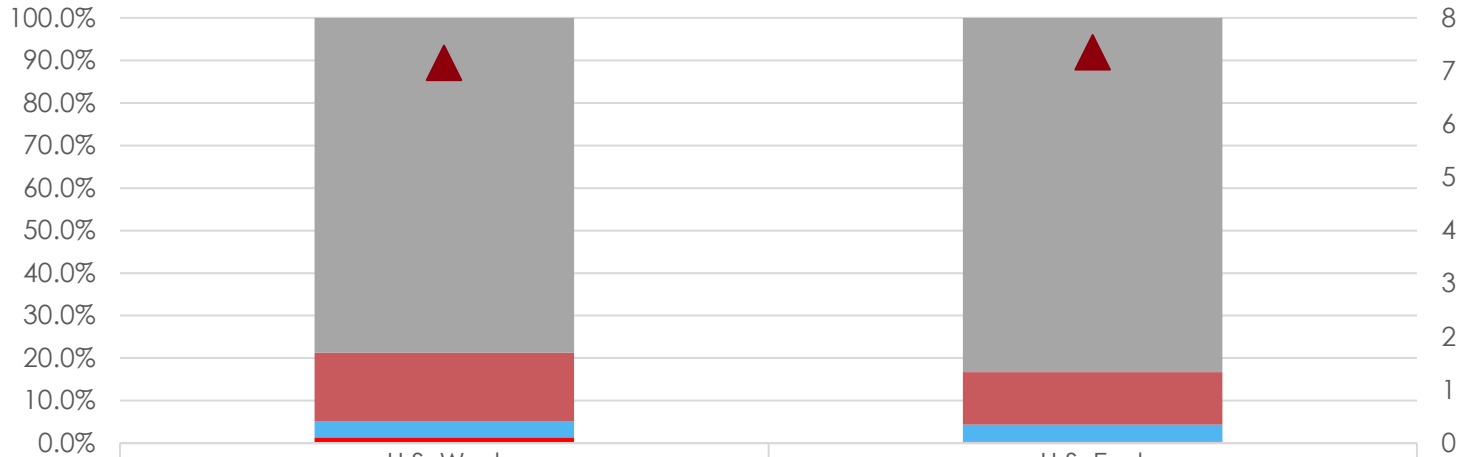
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied





# FRIENDLINESS OF KAUA'I RESIDENTS

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

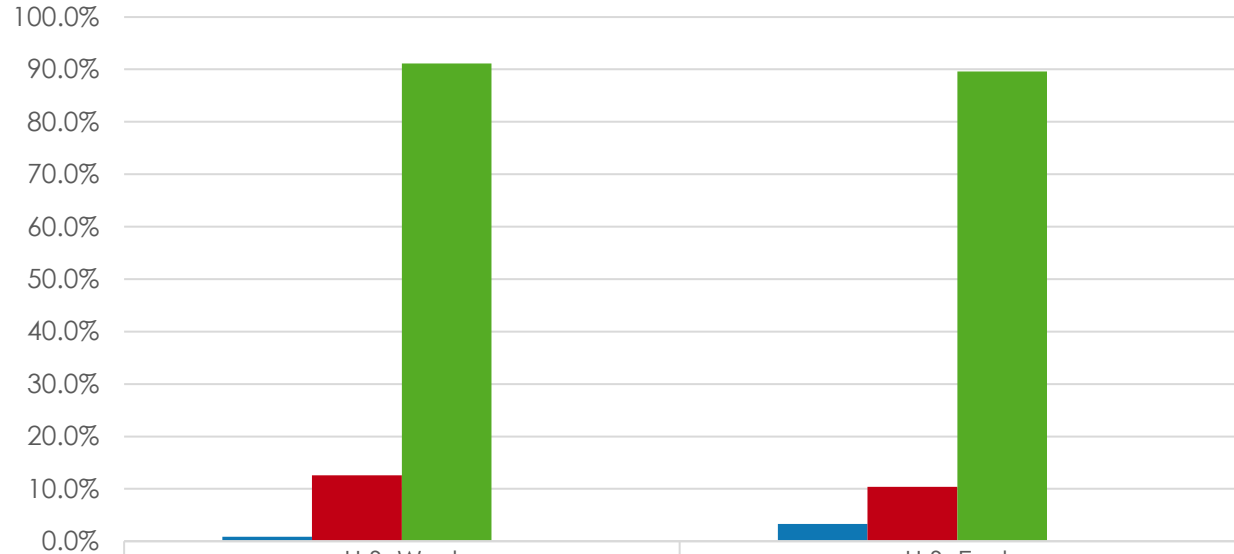


	U.S. West	U.S. East
■ Excellent (7-8)	78.7%	83.3%
■ Above Avg (5-6)	16.1%	12.4%
■ Below Avg (3-4)	3.8%	4.0%
■ Poor (1-2)	1.4%	0.4%
BASE	214	248
▲ MEAN	7.15	7.35

## TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
<b>Been here before</b>	44.0%	28.7%
<b>Friend recommendation</b>	27.3%	41.8%
<b>Location/ Never been, but went to other islands</b>	5.0%	2.0%
<b>Article/ Blog</b>	3.4%	5.1%
<b>Own a timeshare</b>	4.7%	0.8%
<b>Visiting Family/ Friends</b>	2.4%	4.0%
<b>Social Media Post</b>	2.3%	3.6%
<b>Travel Agent</b>	1.0%	3.7%
<b>Nature/ Beauty/ Scenery</b>	1.4%	2.4%
<b>Package price/ affordability / cost</b>	1.5%	1.3%
<b>Have property/Renting</b>	1.8%	0.4%

# SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ Neither of these	0.9%	3.3%
■ Full-face snorkel mask	12.6%	10.4%
■ 2-Piece, separate mask & snorkel	91.1%	89.6%
BASE	114	125

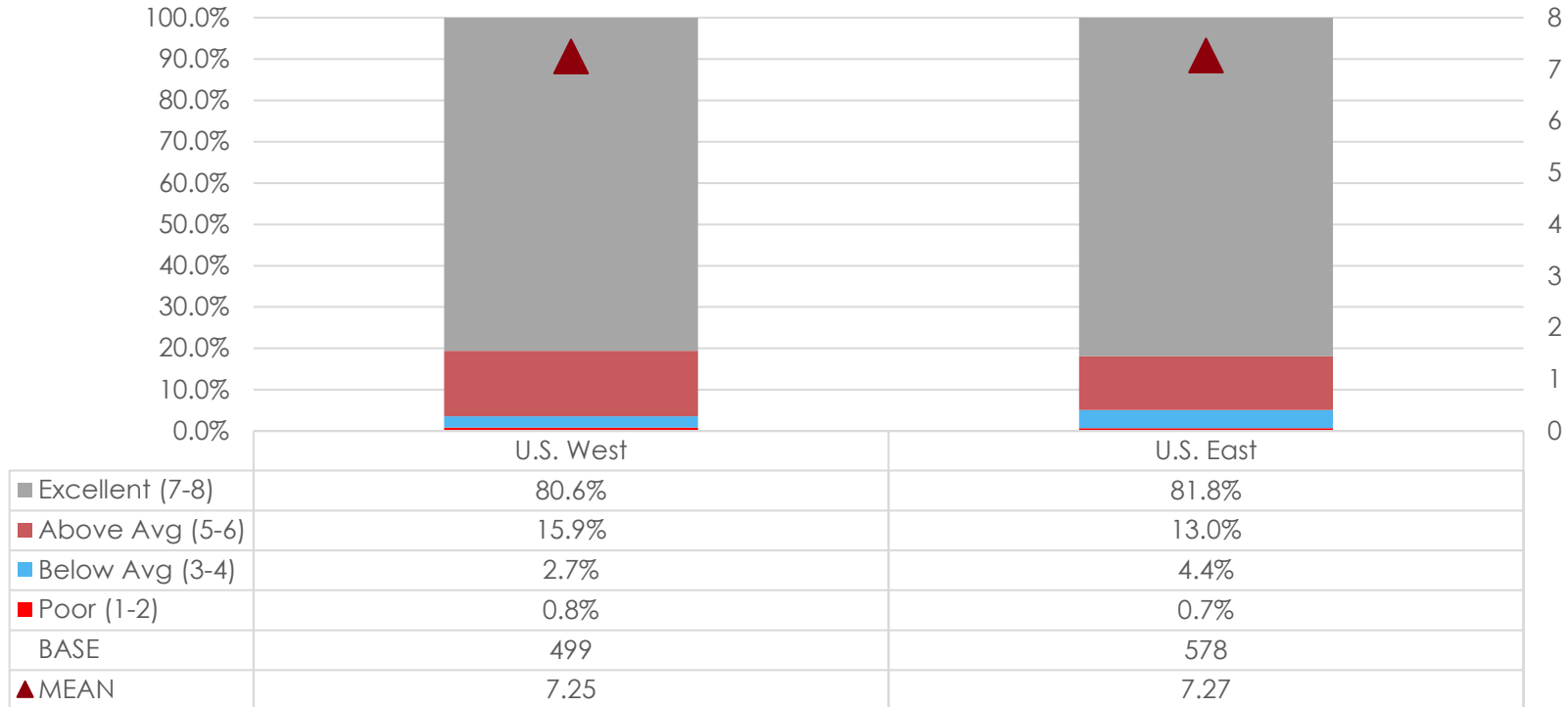
# SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	98.3%	97.3%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	0.9%	2.7%
<b>Yes, needed assistance – using full-face snorkel mask</b>	0.9%	-
<b>BASE</b>	113	121

# SECTION 7 – MAUI

# SATISFACTION – MAUI

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

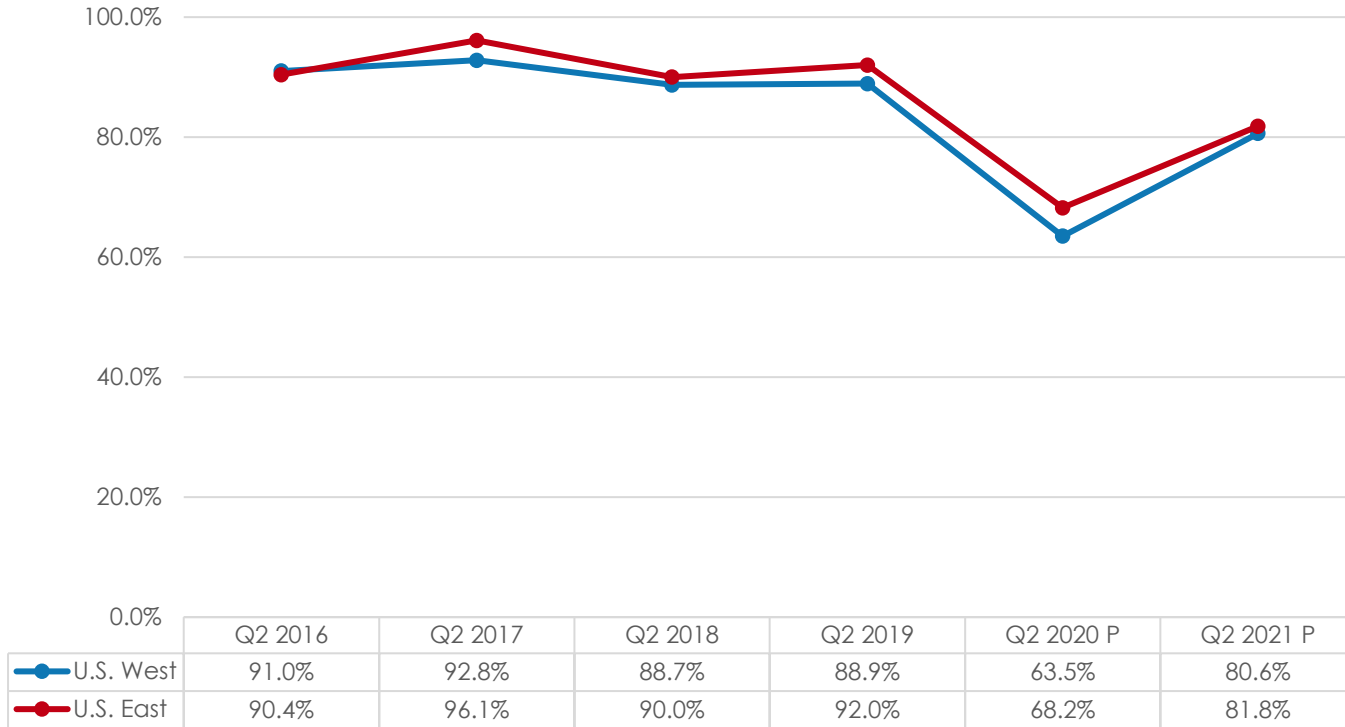


# SATISFACTION – MAUI

- **Gender:** Satisfaction ratings for Maui were higher among female visitors compared to male visitors from the U.S. East market.
- **Age:** From both U.S. West and U.S. East markets, senior travelers to Maui gave the lowest satisfaction scores for their trip.
- **Trips to the state:** Visitors from U.S. West who indicate this is their first visit to Maui gave higher satisfaction scores compared to those who have visited the state previously.
- **Islands visited:** Those visitors from U.S. West whose trip consisted of visiting just Maui during their stay, gave the island a higher satisfaction score compared to Maui visitors who also visited another island during their stay.

# SATISFACTION – MAUI

TOP BOX – EXCELLENT (7-8)

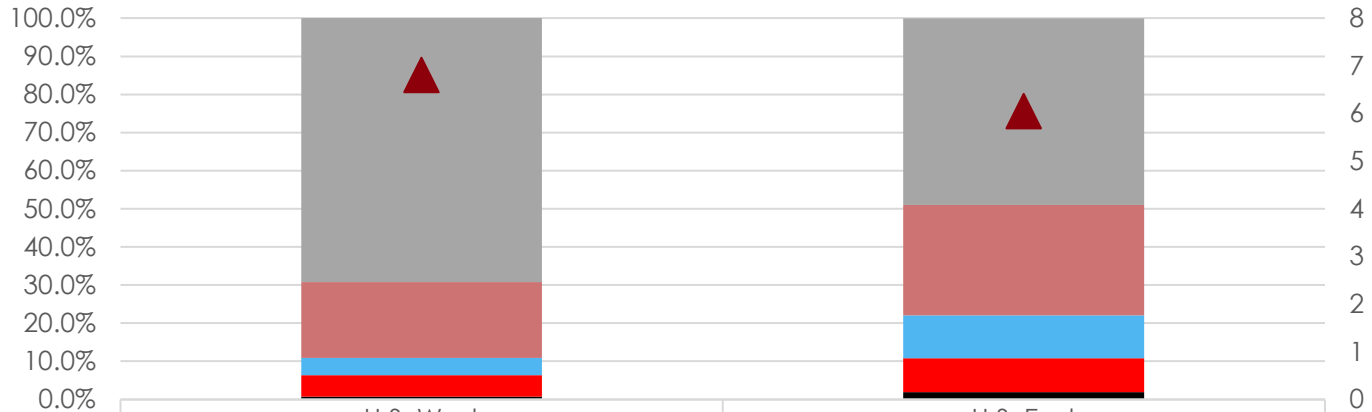


P= Preliminary Data



# LIKELIHOOD OF RETURN VISIT – MAUI

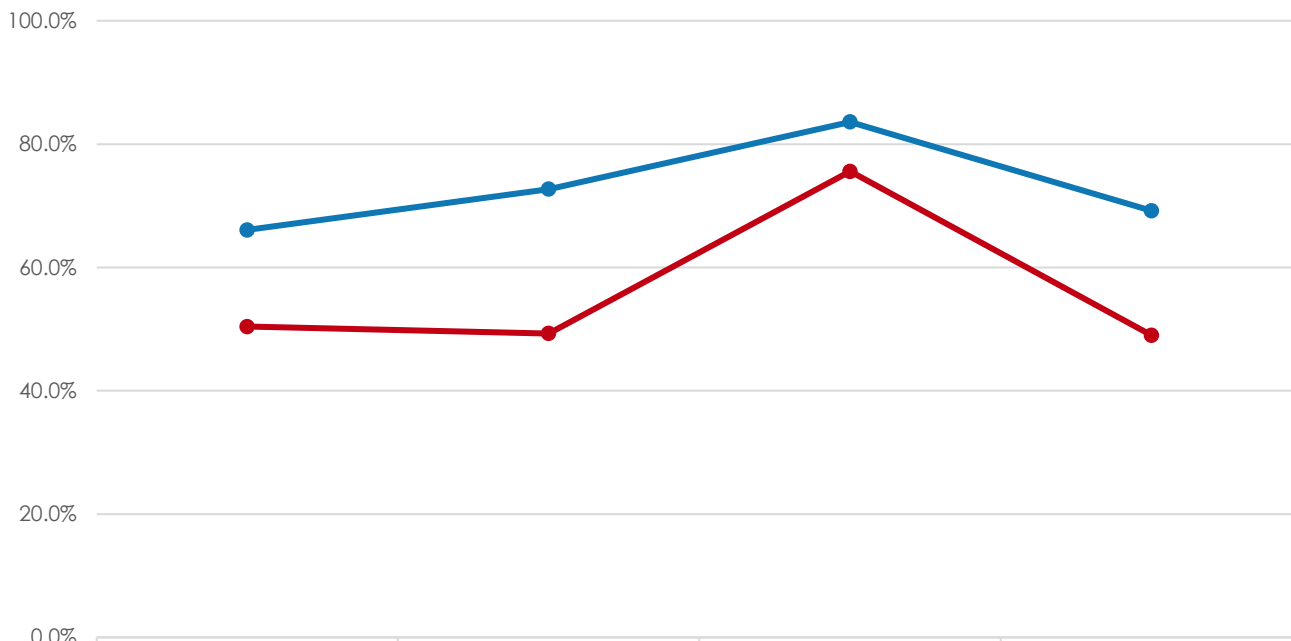
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	69.2%	49.0%
Somewhat likely (5-6)	19.9%	28.9%
Somewhat unlikely (3-4)	4.5%	11.3%
Very unlikely (1-2)	5.7%	8.9%
Not sure	0.7%	1.9%
BASE	483	521
MEAN	6.81	6.05

# LIKELIHOOD OF RETURN VISIT – MAUI

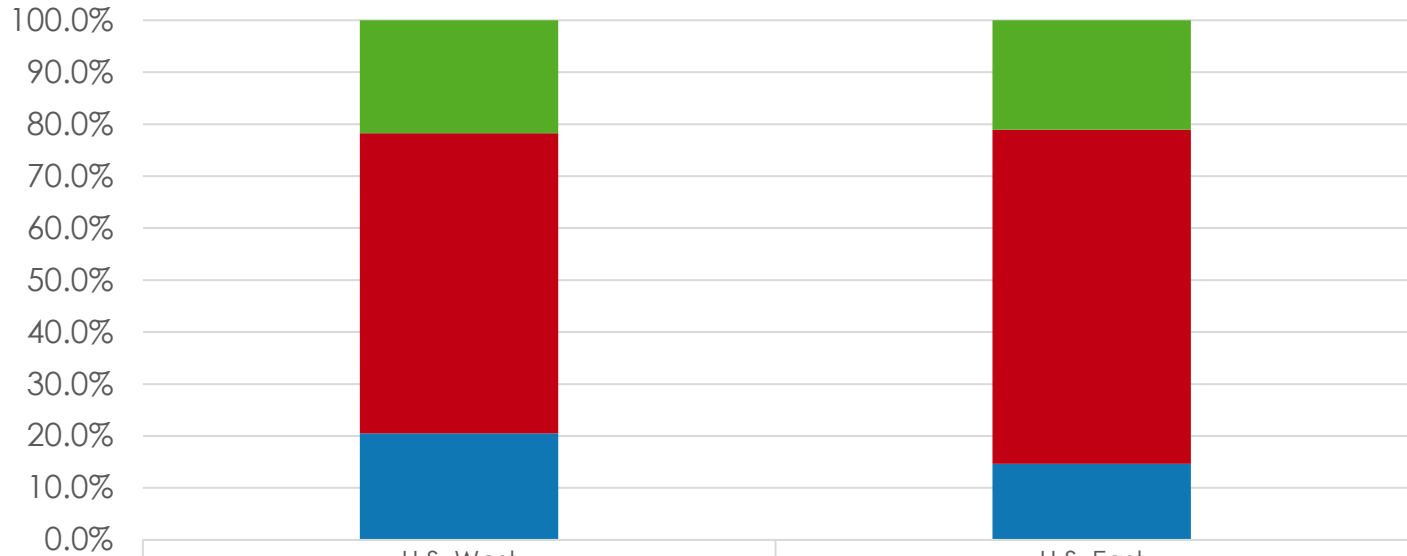
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	66.1%	72.7%	83.6%	69.2%
U.S. East	50.4%	49.3%	75.6%	49.0%

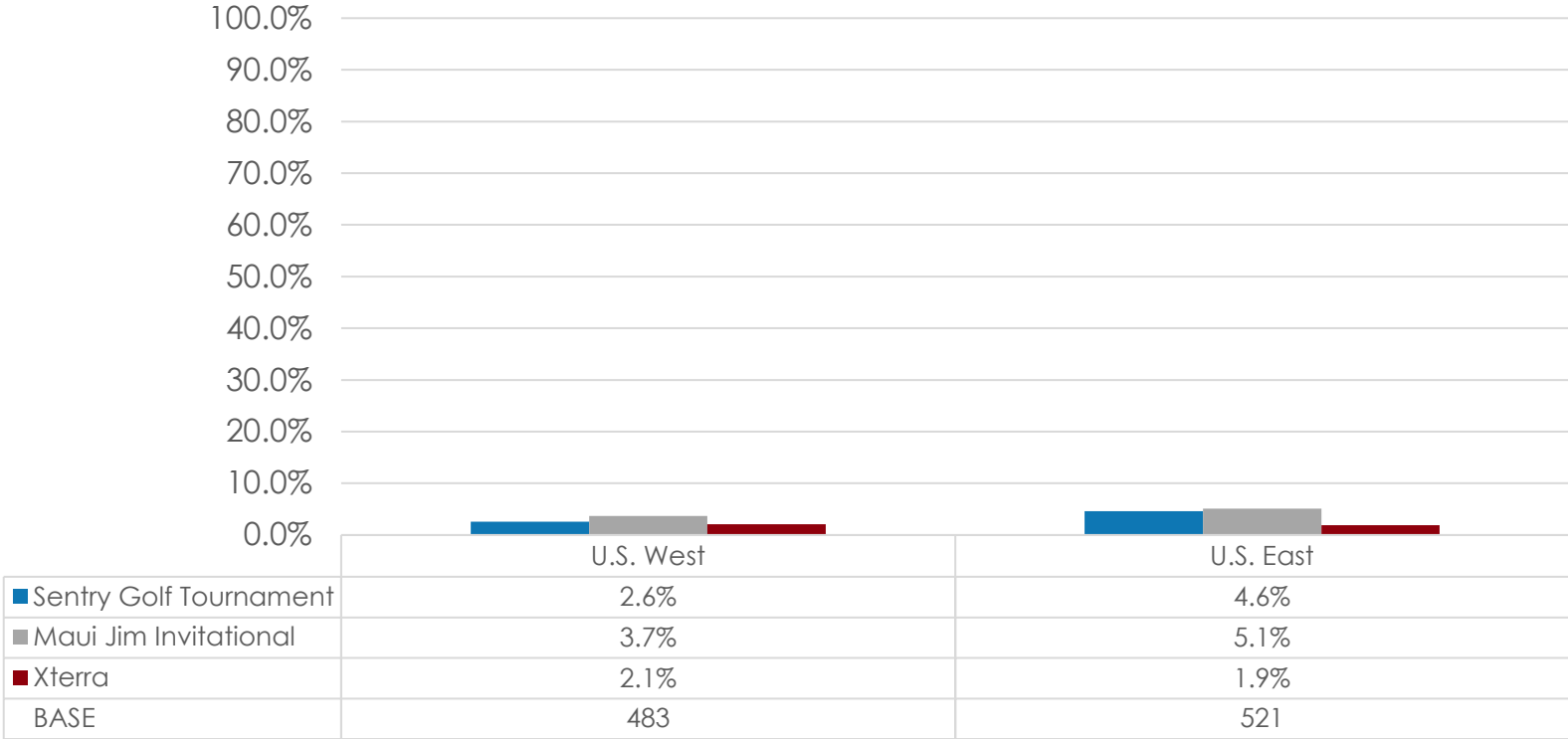
P= Preliminary Data

# AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	21.8%	21.1%
■ No Prior Awareness	57.7%	64.3%
■ Unsure	20.5%	14.6%
BASE	483	521

# AIDED ADVERTISING AWARENESS – MAUI EVENTS



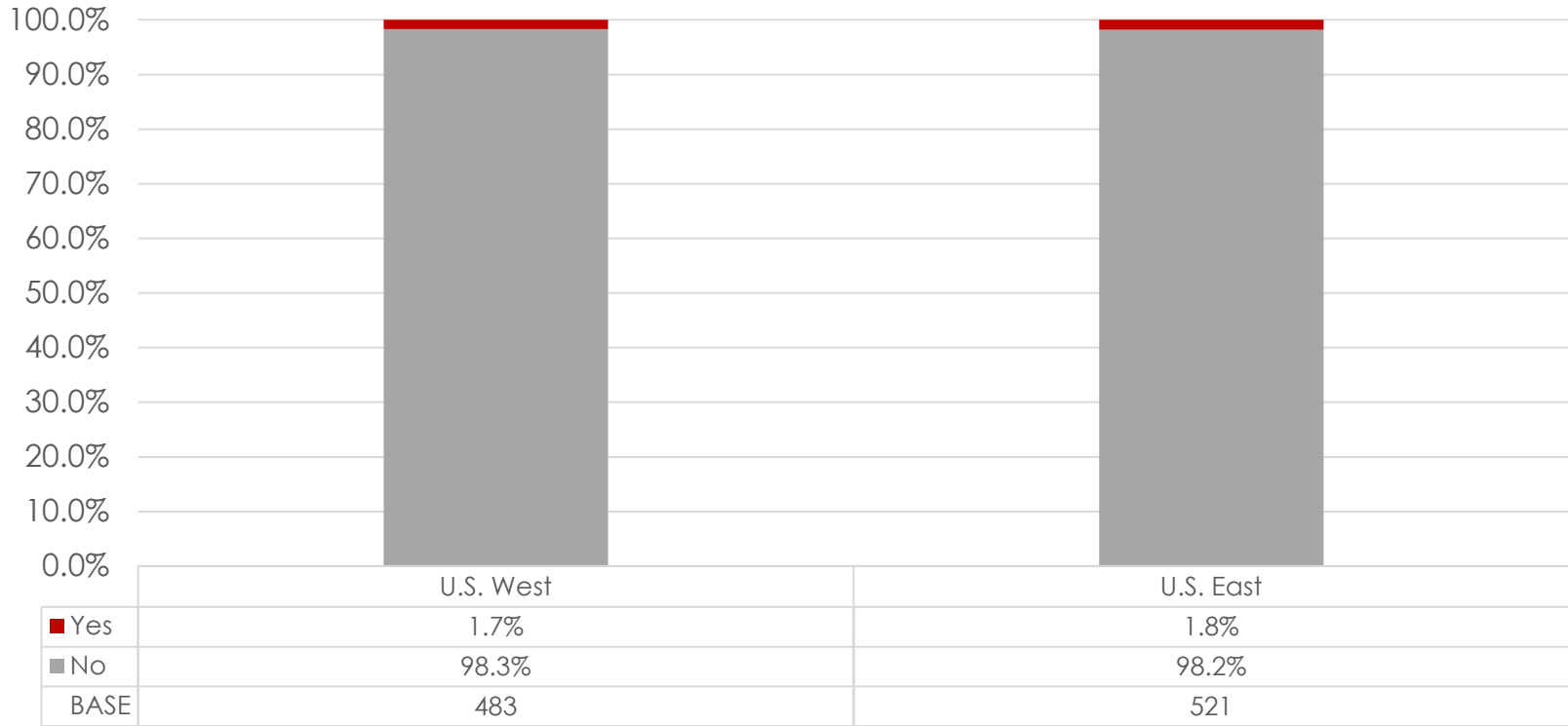
## MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
<b>Famous landmarks or imagery/ natural beauty</b>	41.8%	50.6%
<b>Outdoor or sporting activities and events</b>	20.8%	18.0%
<b>Hawaiian cultural events</b>	9.1%	11.9%
<b>Social media posts and videos</b>	9.6%	15.4%
<b>Hawaiian Music</b>	6.9%	4.7%
<b>TV programs/ Movies filmed in Hawai'i</b>	4.1%	7.1%
<b>None of these</b>	45.9%	36.3%

# ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	1.0%	0.6%
Aquarium Maui /Maui Ocean Center	13.3%	13.8%
Baldwin Missionary Home Museum	2.8%	3.8%
Hale Pa'i Printing House	0.0%	0.2%
Haleakala National Park	32.7%	47.6%
Haleki'i-Pihana Heiau State Monument	2.3%	2.1%
Hana Cultural Center	8.1%	10.6%
'Iao Valley State Monument	14.9%	15.3%
Kepaniwai Park & Heritage Gardens	3.1%	5.4%
Kula Botanical Garden	6.1%	7.4%
Maui Historical Society Bailey House Museum	1.2%	0.5%
Whaler's Village Museum	14.6%	12.0%
Wo Hing Temple Museum	0.8%	0.8%

# VISITED MAUI FOR SPECIFIC EVENT

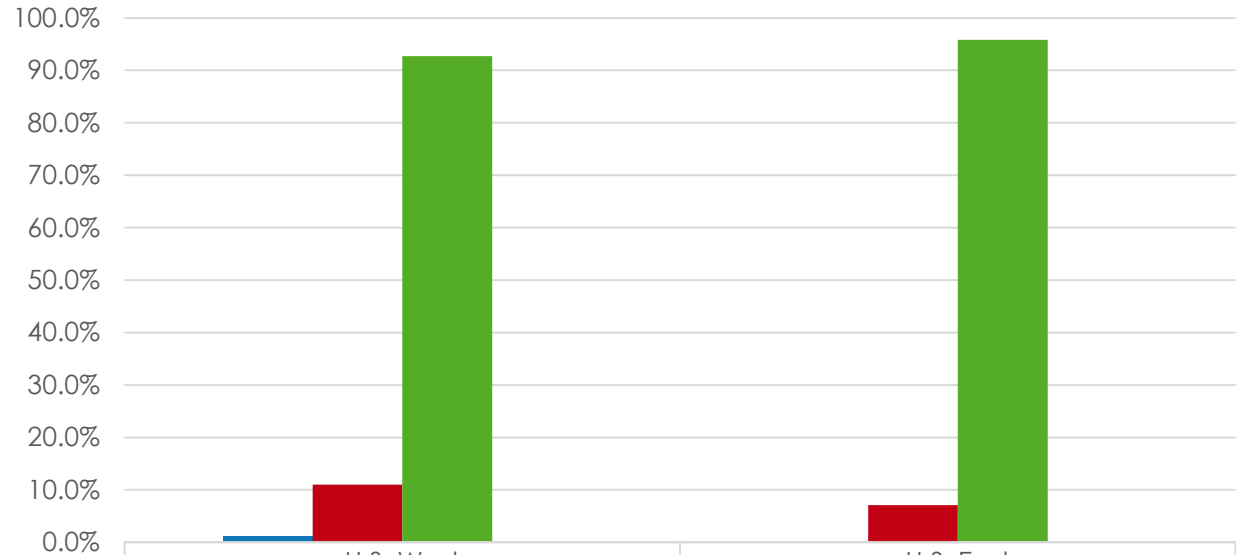


## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Other	100%	100%
BASE	8	9



# SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ Neither	1.1%	0.0%
■ Full-face snorkel mask	11.0%	7.1%
■ 2-Piece, separate mask & snorkel	92.7%	95.8%
BASE	289	289

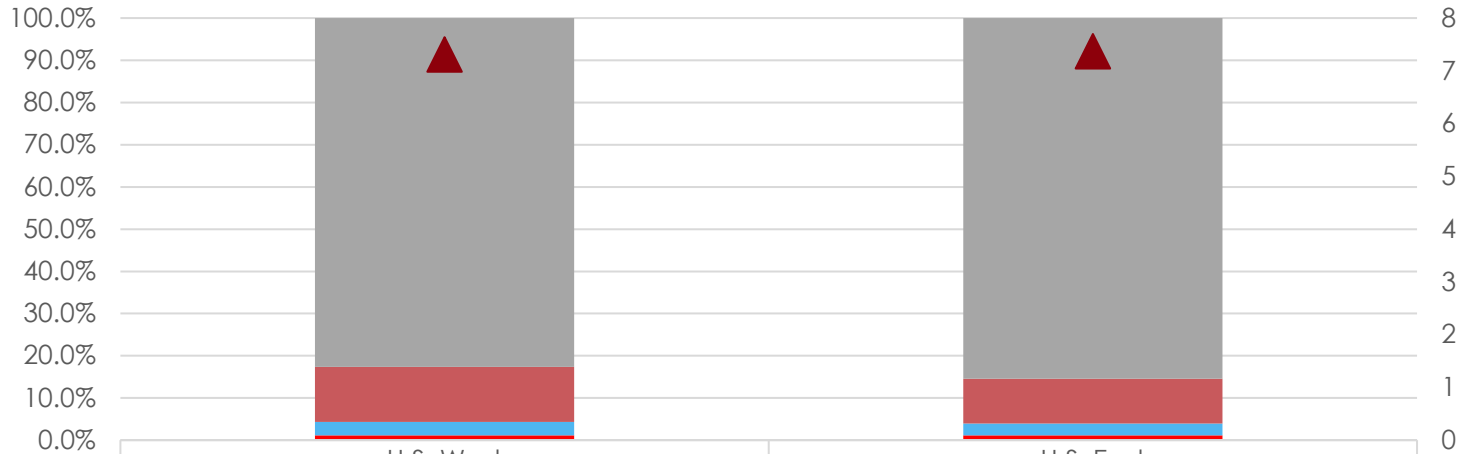
# SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	97.4%	97.5%
<b>Yes needed assistance- two-piece mask &amp; snorkel</b>	2.6%	2.5%
<b>Yes, needed assistance – full-snorkel facemask</b>	-	-
<b>BASE</b>	286	289

# SECTION 8 – ISLAND OF HAWAI‘I

# SATISFACTION – ISLAND OF HAWAI‘I

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



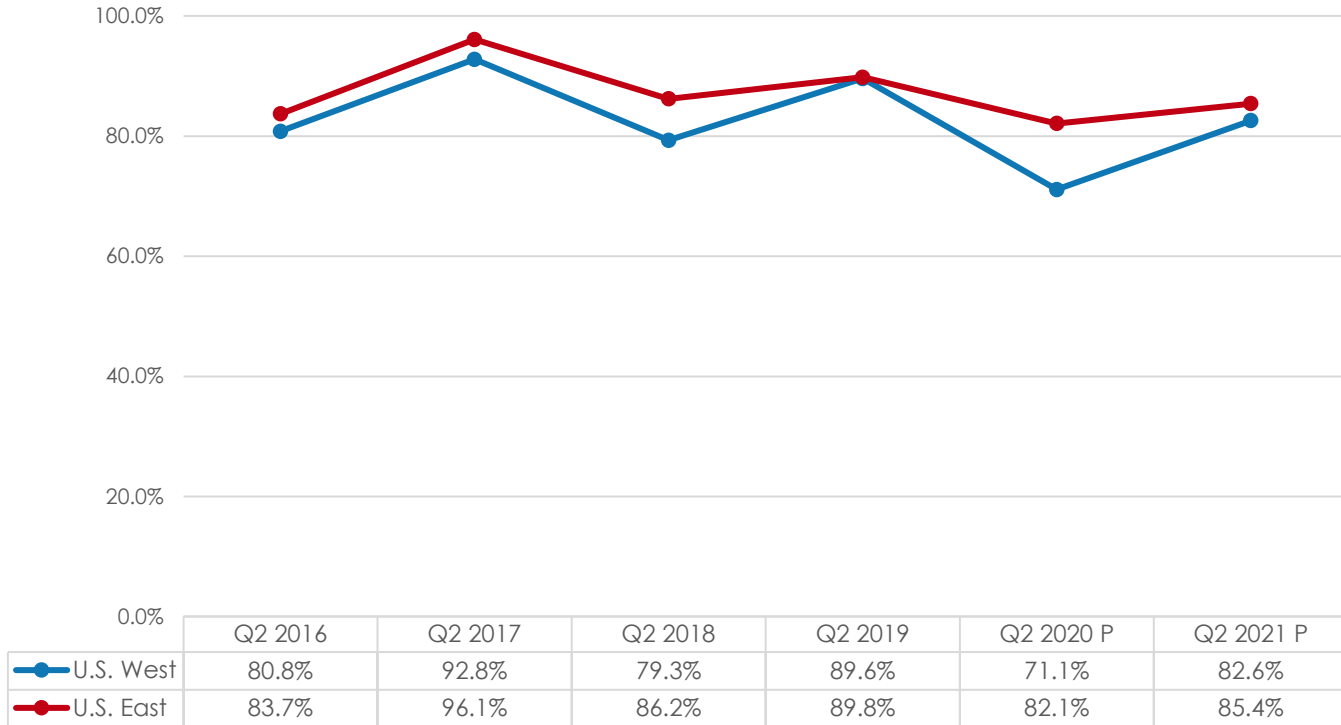
	U.S. West	U.S. East
■ Excellent (7-8)	82.6%	85.4%
■ Above Avg (5-6)	13.0%	10.6%
■ Below Avg (3-4)	3.2%	2.8%
■ Poor (1-2)	1.1%	1.1%
BASE	372	345
▲ MEAN	7.31	7.37

# SATISFACTION – ISLAND OF HAWAI‘I

- **Islands visited:** Visitors from U.S. West and U.S. East whose trip was spent entirely on the Island of Hawai‘i were more satisfied with their stay, compared to those who visited multiple islands.

# SATISFACTION – ISLAND OF HAWAII

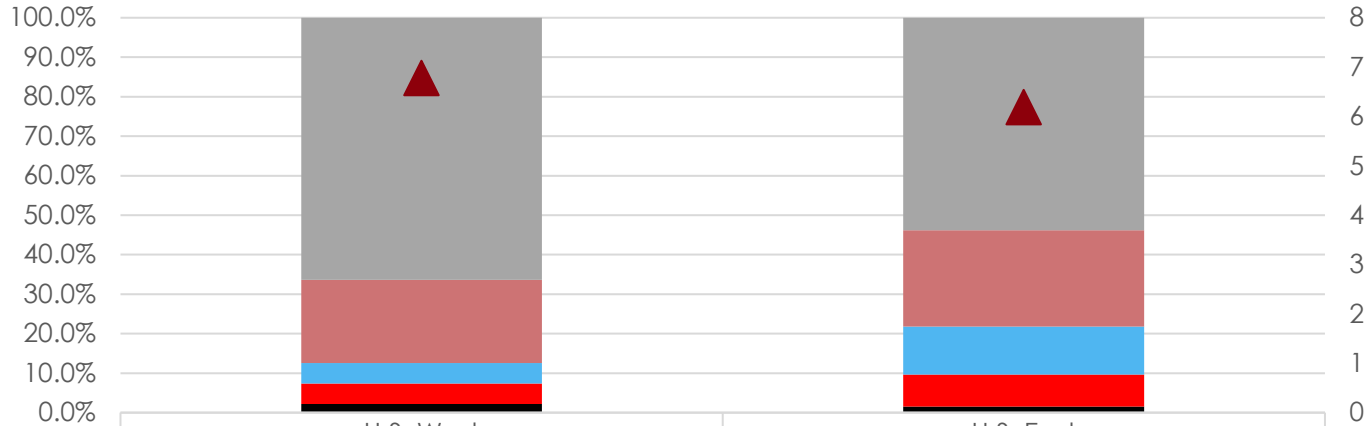
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

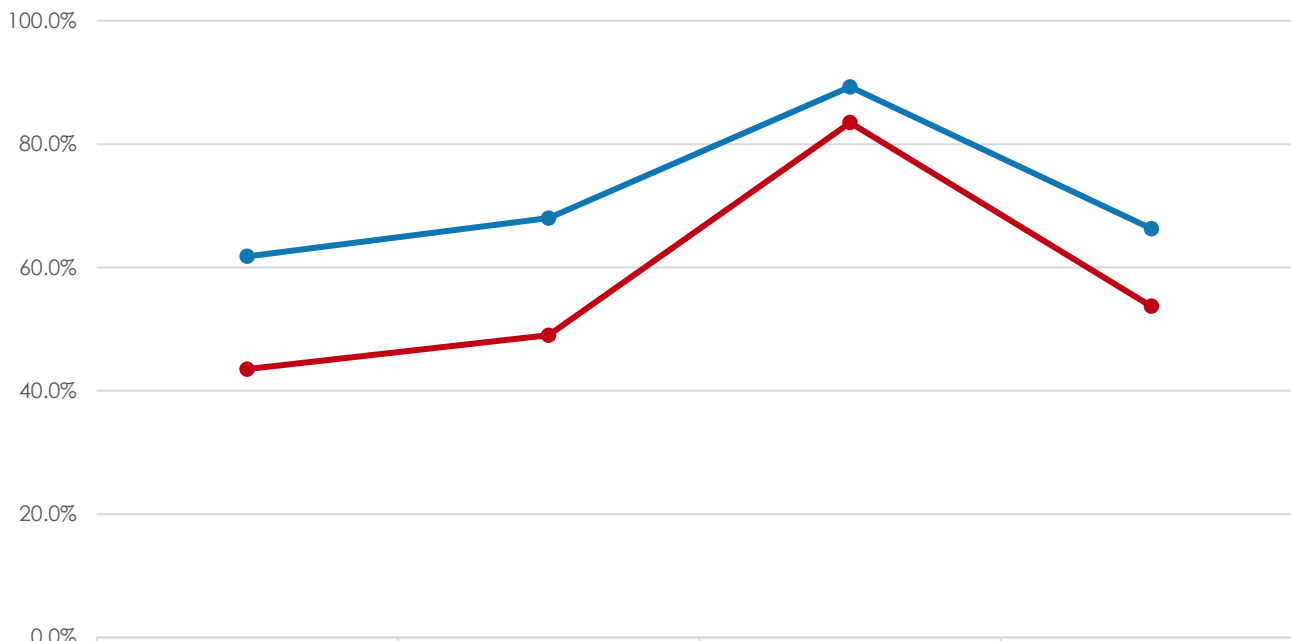
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	66.3%	53.7%
■ Somewhat likely (5-6)	21.1%	24.5%
■ Somewhat unlikely (3-4)	5.1%	12.1%
■ Very unlikely (1-2)	5.2%	8.1%
■ Not sure	2.2%	1.5%
BASE	366	323
▲ MEAN	6.78	6.19

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

## TOP BOX – EXCELLENT (7-8)

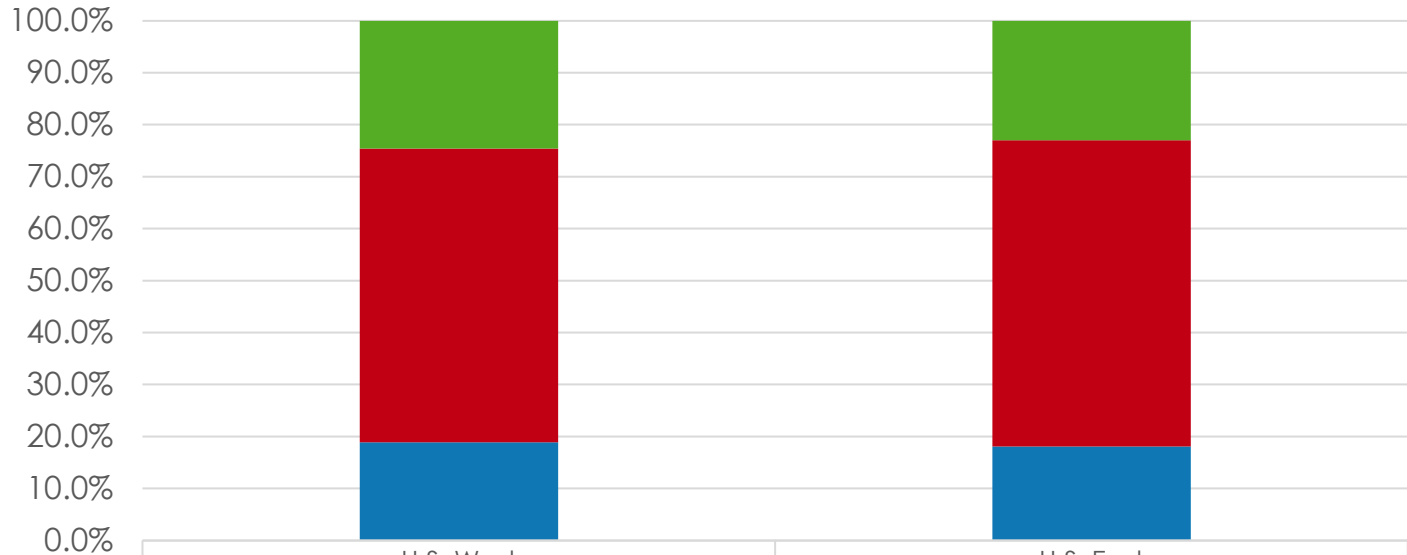


	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	61.8%	68.0%	89.3%	66.3%
U.S. East	43.5%	49.0%	83.5%	53.7%

P= Preliminary Data



# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	24.6%	23.0%
■ No Prior Awareness	56.5%	58.9%
■ Unsure	18.9%	18.1%
BASE	366	323

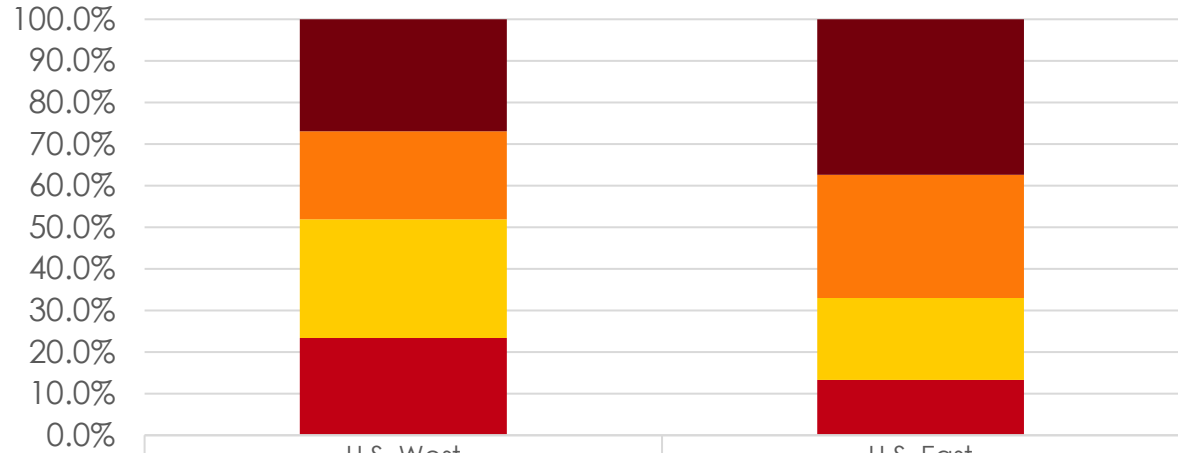
# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	31.7%	38.3%
Botanical Gardens	14.3%	16.6%
H.N. Greenwell Store	3.0%	6.3%
Hawai'i Volcanoes National Park	52.2%	71.4%
Hilo Farmers Market	29.4%	27.5%
Hulihe'e Palace	2.6%	3.0%
'Imiloa Astronomy Ctr	1.1%	0.9%
Kaloko-Honokohau National Historical Park	8.8%	8.9%
Kona Coffee Living History Farm	10.5%	12.3%
Lili'uokalani Park and Garden	7.7%	8.4%

## ATTRACTIONS – ISLAND OF HAWAI‘I (cont.)

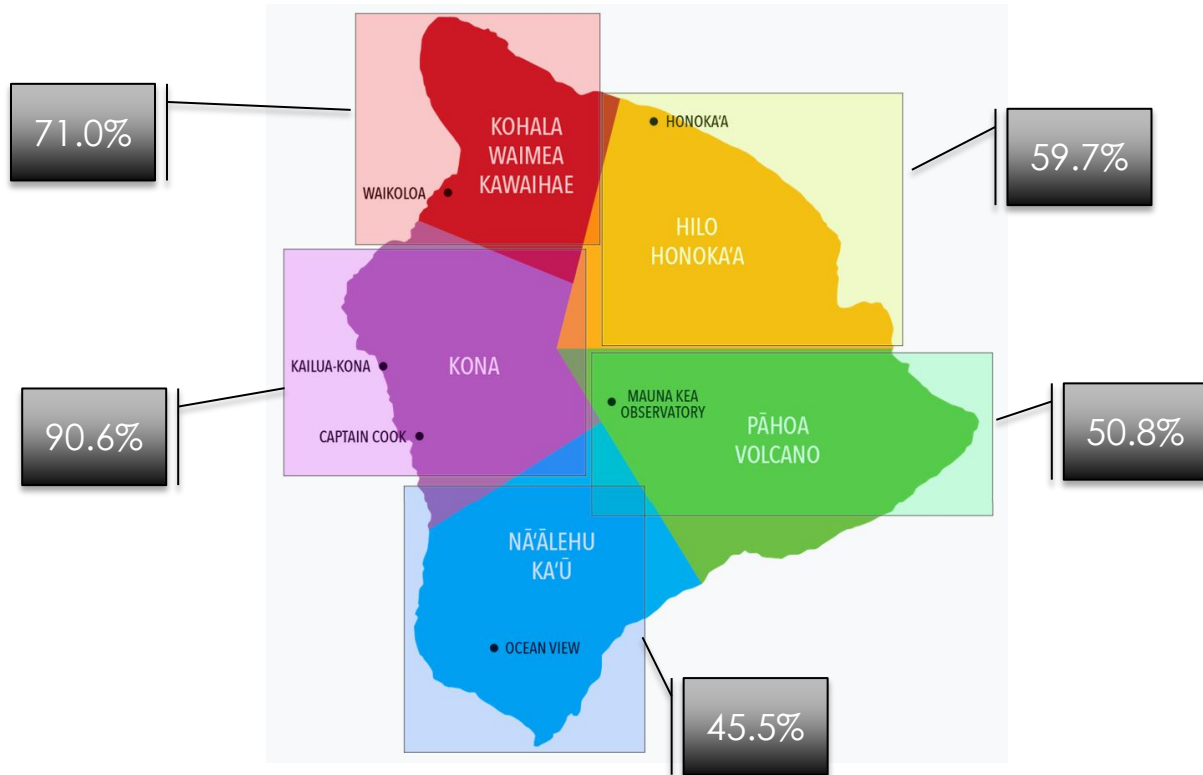
	U.S. West	U.S. East
<b>Lyman House Memorial Museum</b>	0.8%	1.8%
<b>Maunakea</b>	17.0%	24.1%
<b>Orchid Farm</b>	1.1%	2.5%
<b>Pacific Tsunami Museum</b>	1.3%	1.2%
<b>Pana‘ewa Rainforest Zoo &amp; Garden</b>	0.5%	1.2%
<b>Pu‘uhonua o Honaunau National Historical Park</b>	21.5%	25.2%
<b>Pu‘ukohola Heia National Historical Site</b>	9.1%	10.9%
<b>Punalu‘u Black Sand Beach</b>	32.8%	44.9%
<b>Rainbow Falls</b>	30.3%	41.2%
<b>Volcano Art Center</b>	5.4%	7.8%

# TRAVEL ON ISLAND OF HAWAI'I

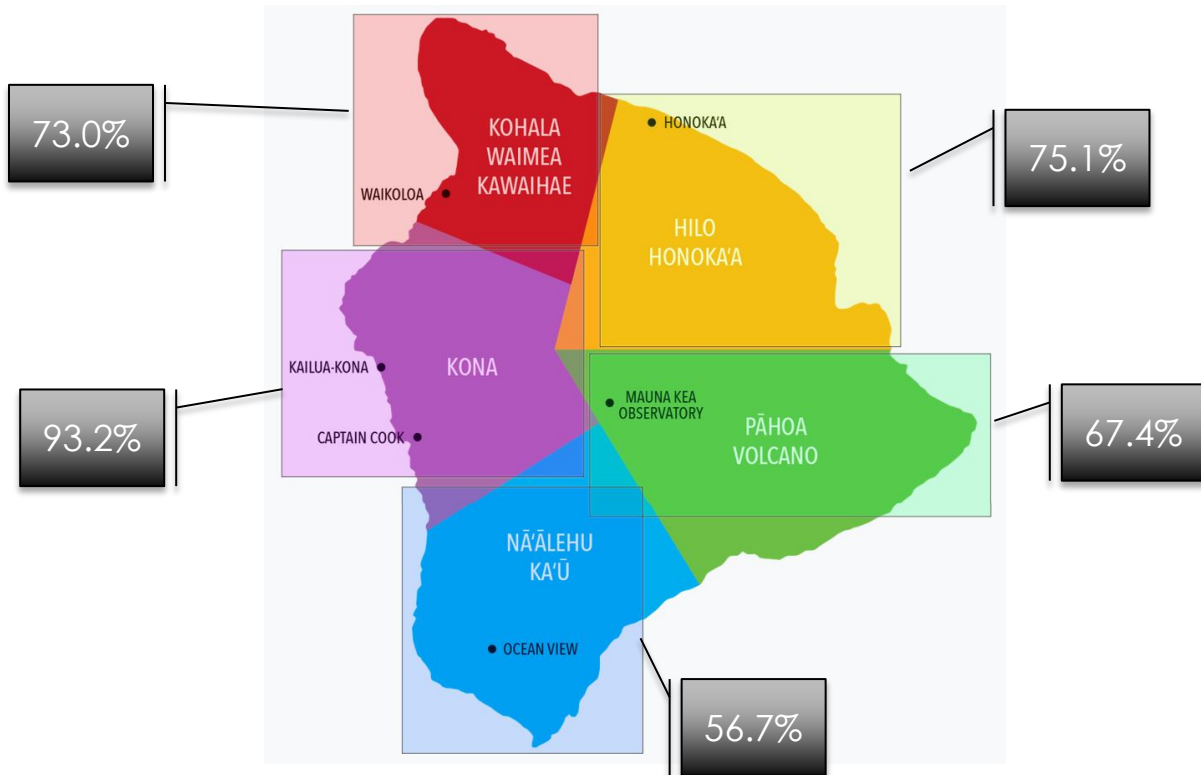


	U.S. West	U.S. East
■ Traveled to other side of island	26.9%	37.4%
■ Traveled more than 1 hour one way to reach activities	21.2%	29.6%
■ Traveled 1 hour or less one way to reach activity	28.5%	19.7%
■ Enjoy activities- short drive from accommodations	23.4%	13.3%
● BASE	366	323

# AREAS VISITED U.S. WEST

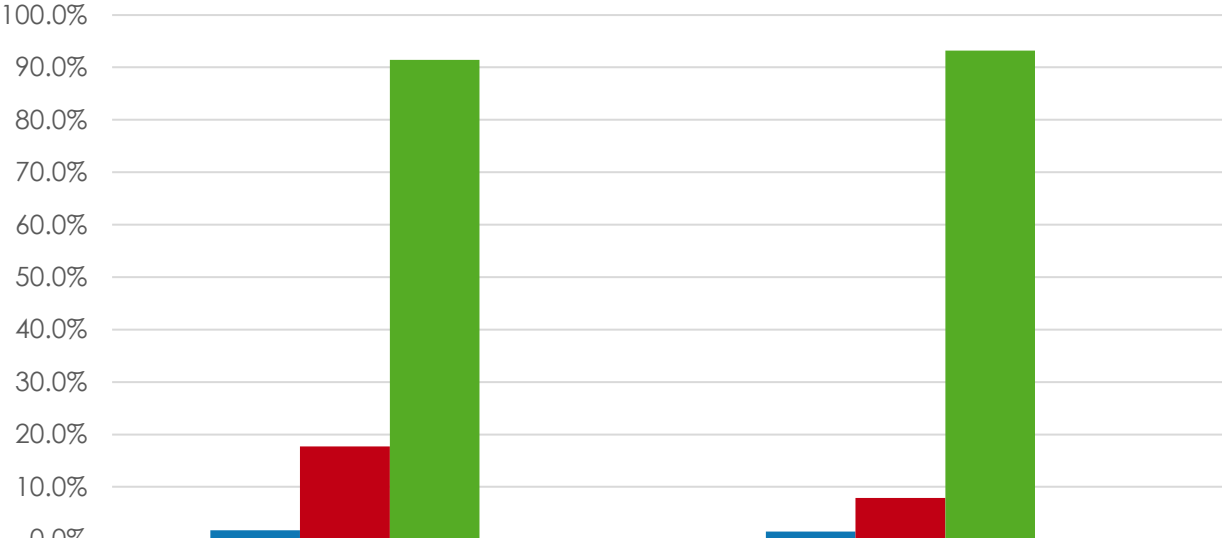


# AREAS VISITED U.S. EAST



110 Q. Which of the following areas did you visit during your stay on Hawai'i Island?

# SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Neither of these	1.7%	1.5%
■ Full-face snorkel mask	17.7%	7.9%
■ 2-Piece, separate mask & snorkel	91.4%	93.2%
BASE	232	187

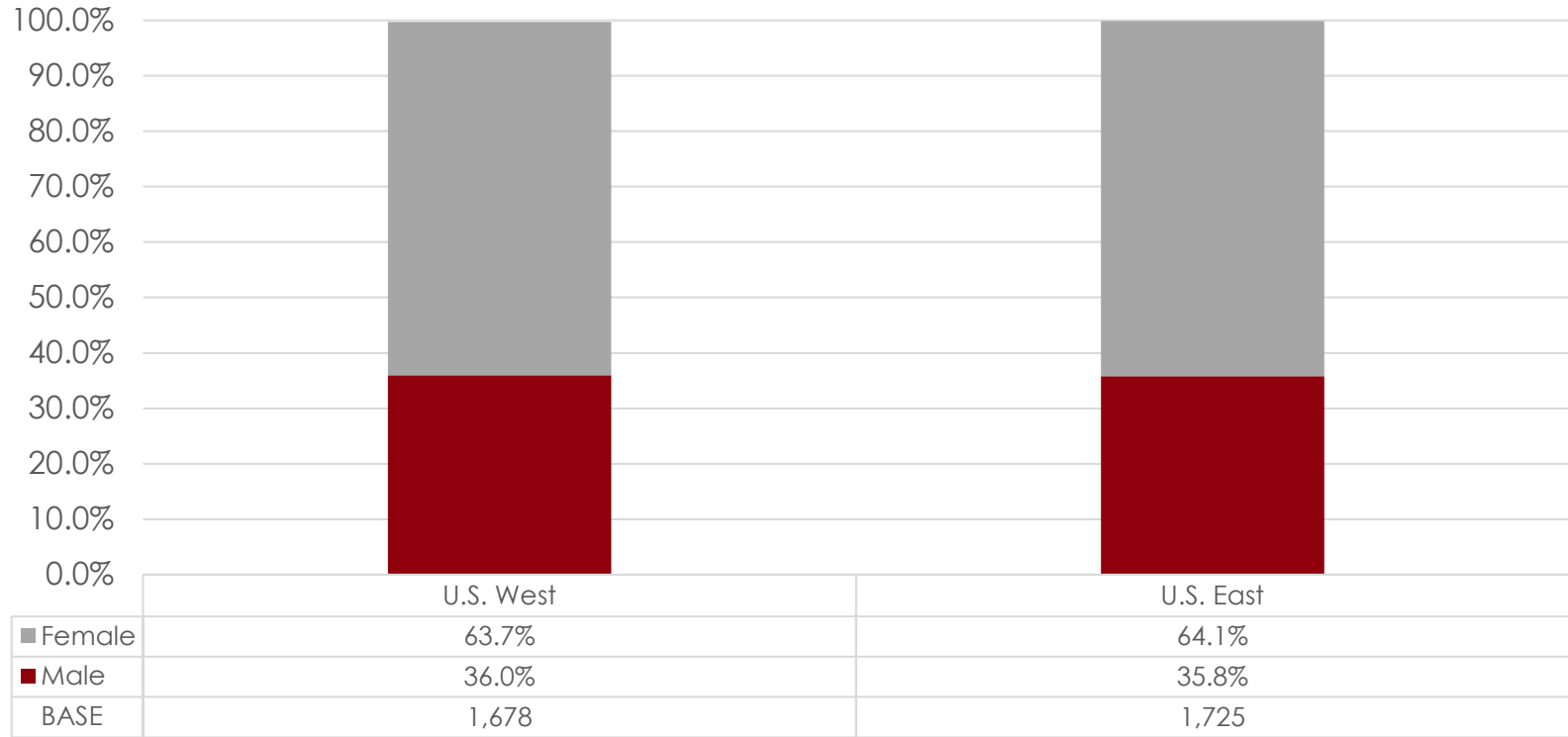
# SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	98.7%	99.5%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	1.3%	0.5%
<b>Yes, needed assistance – using full-face mask</b>	-	-
<b>BASE</b>	228	184

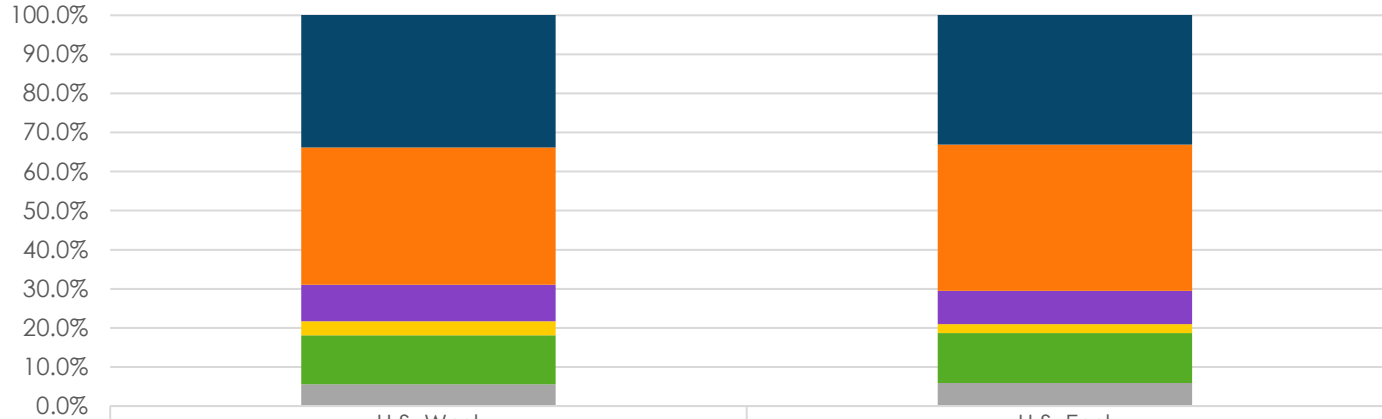


# SECTION 9 – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION

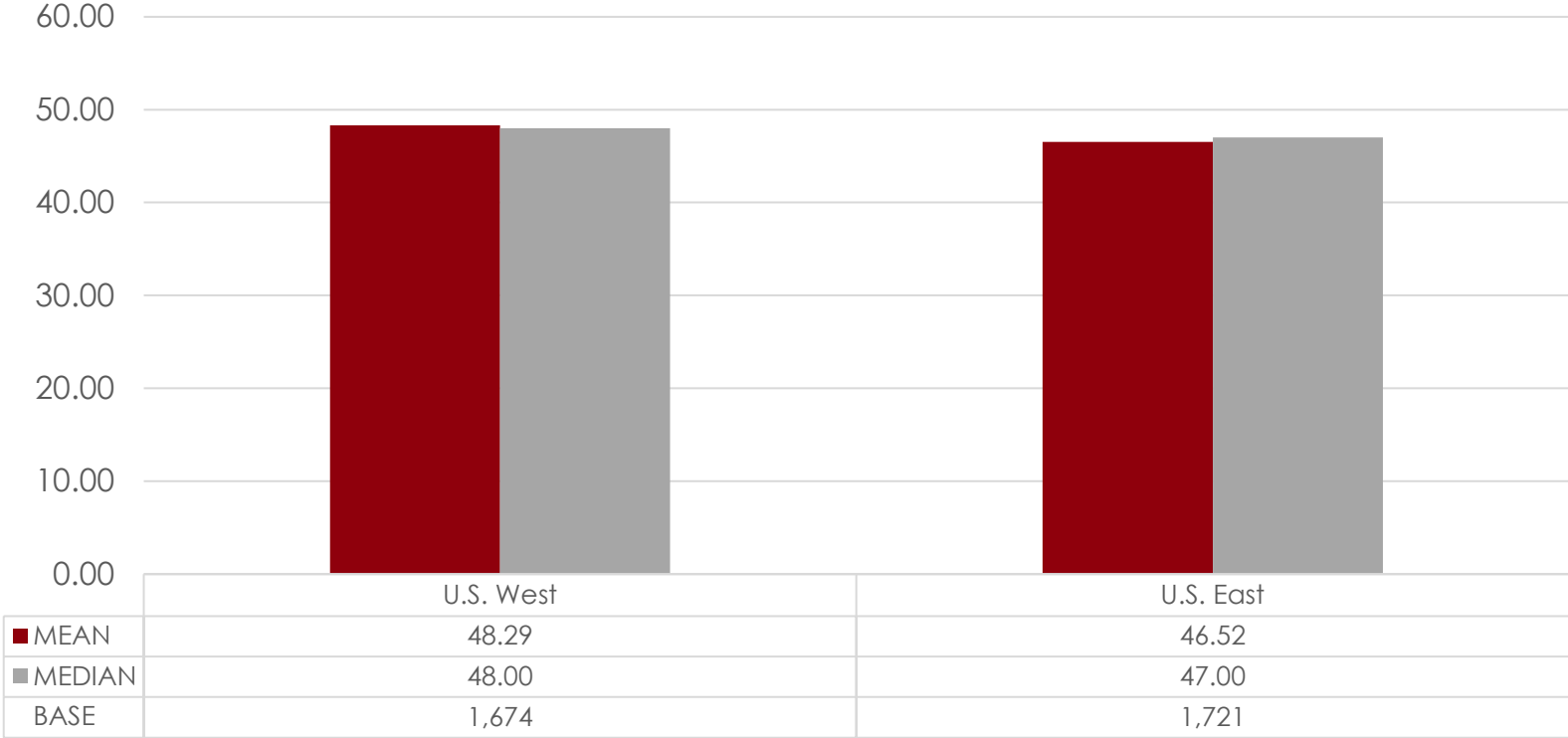


	U.S. West	U.S. East
■ Post-Graduate	33.9%	33.2%
■ College Grad	35.2%	37.4%
■ Associate Degree	9.3%	8.5%
■ Vocational/ Tech	3.6%	2.3%
■ Some College	12.5%	12.8%
■ High School Grad	5.5%	5.7%
■ Some / No High School	0.1%	0.2%
BASE	1,678	1,725

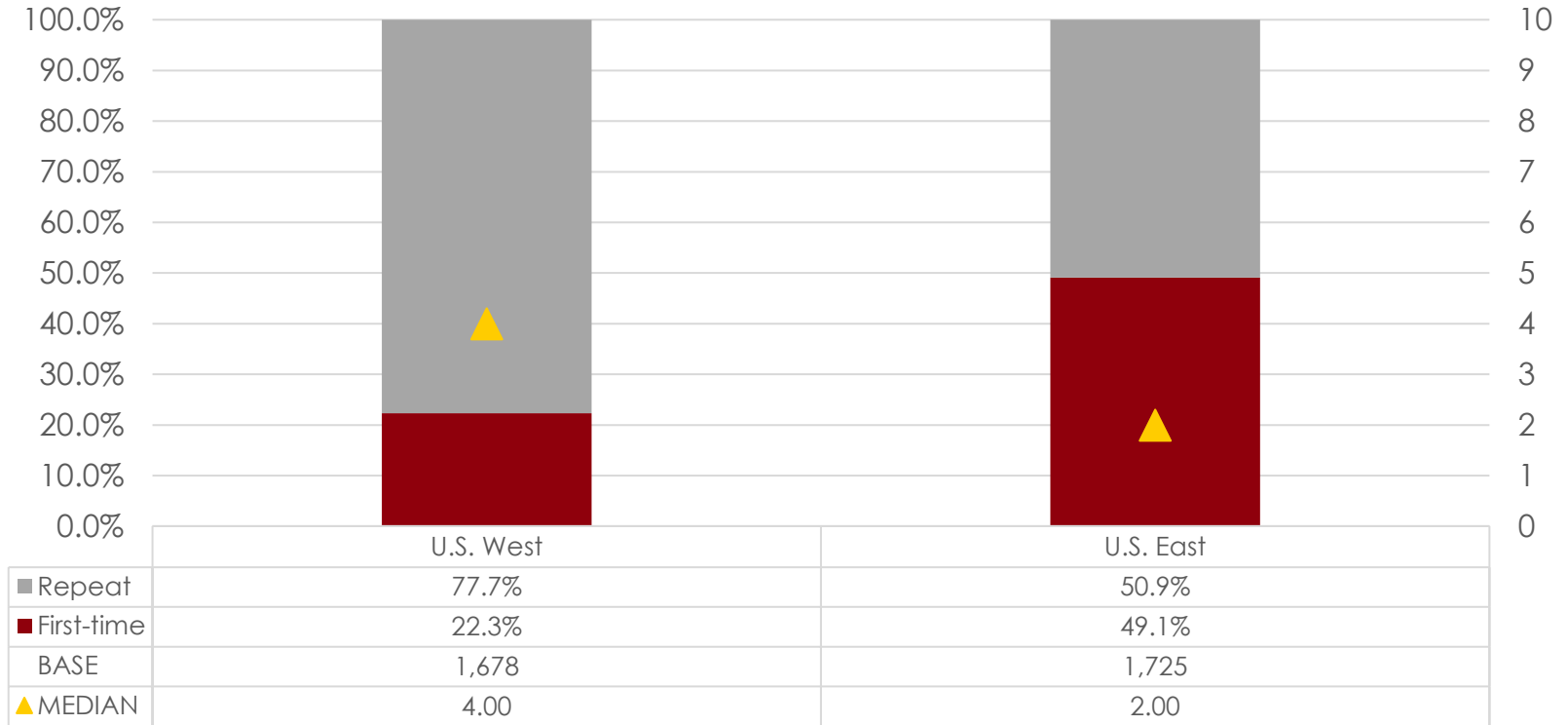
# VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	6.3%	7.9%
\$40,000 to \$59,999	6.4%	8.4%
\$60,000 to \$79,999	8.8%	10.0%
\$80,000 to \$99,999	10.2%	9.3%
\$100,000 to \$124,999	11.5%	12.5%
\$125,000 to \$149,999	10.7%	12.3%
\$150,000 to \$174,999	8.5%	8.4%
\$175,000 to \$199,999	6.6%	6.9%
\$200,000 to \$249,999	10.1%	8.0%
\$250,000 +	20.9%	16.3%

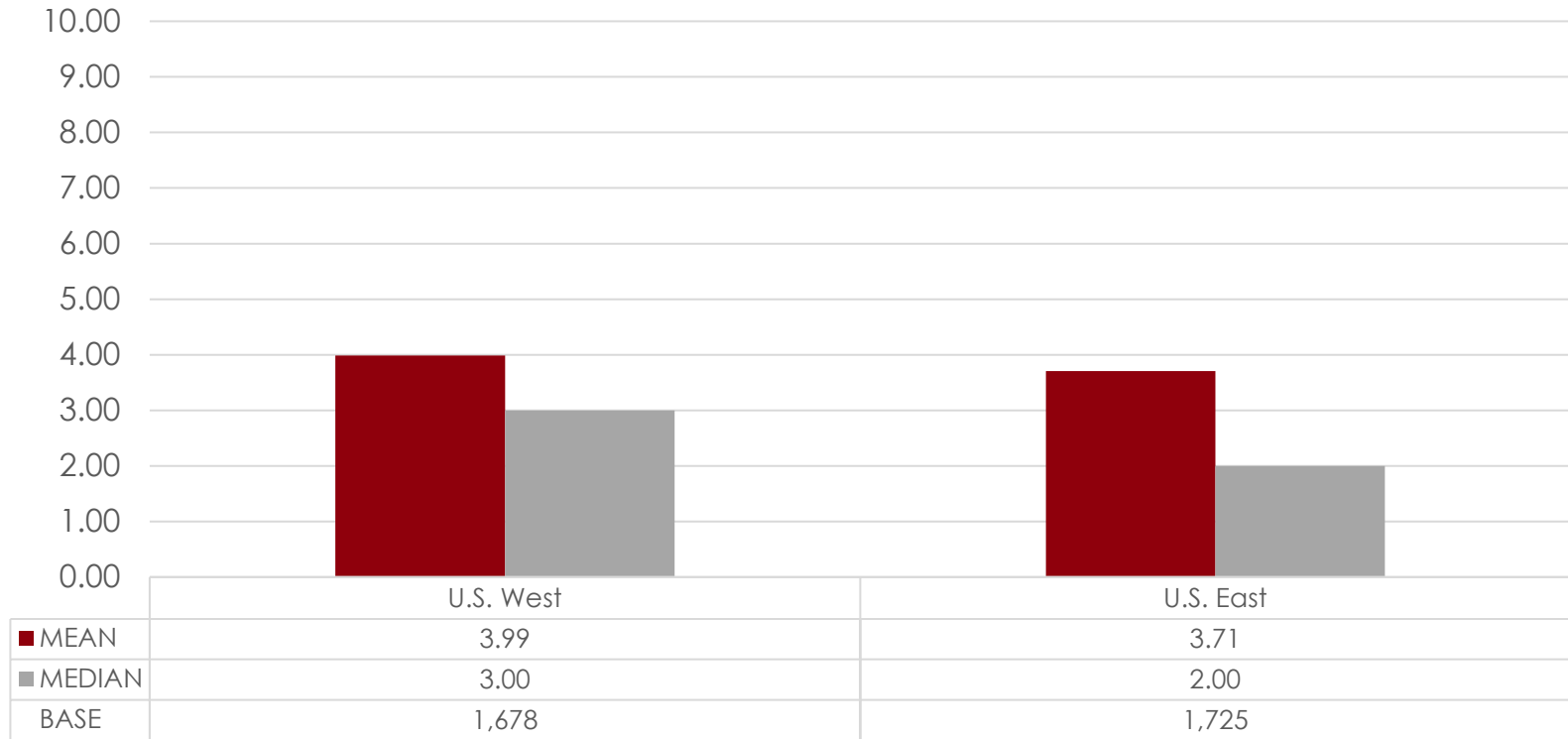
# VISITOR PROFILE – AGE



# VISITOR PROFILE – TRIPS TO HAWAI‘I



# VISITOR PROFILE – TRAVEL PARTY SIZE



# VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
<b>Spouse</b>	58.9%	54.9%
<b>Other adult members of my family</b>	30.6%	28.7%
<b>Child/ grandchild under 18</b>	32.1%	23.1%
<b>Friends/ associates</b>	18.6%	19.6%
<b>Alone</b>	7.0%	7.8%
<b>Girlfriend/ boyfriend</b>	8.3%	8.9%
<b>Same gender partner</b>	0.9%	0.8%



# 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 tables summarizes the number of surveys completed for the island of O‘ahu.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	715	3.67%
<b>U.S. East</b>	910	3.25%
<b>All MMAs</b>	1,625	2.43%

\*Margins of error are presented at the 95 percent 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 tables summarizes the number of surveys completed for the island of Kaua‘i.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	214	6.70%
<b>U.S. East</b>	248	6.22%
<b>All MMAs</b>	462	4.56%

\*Margins of error are presented at the 95 percent 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 tables summarizes the number of surveys completed for the island of Maui.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	499	4.39%
<b>U.S. East</b>	578	4.08%
<b>All MMAs</b>	1,077	2.99%

\*Margins of error are presented at the 95 percent 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 tables summarizes the number of surveys completed for the island of Hawai'i.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	372	5.08%
<b>U.S. East</b>	345	5.28%
<b>All MMAs</b>	717	3.66%

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