

# Visitor Satisfaction and Activity Survey

2020 ANNUAL REPORT

Prepared for:  
Hawai'i Tourism Authority

[ANTHOLOGY®]

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# METHODOLOGY – Markets Sampled

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major markets who recently completed a trip to Hawai'i. The sampled markets 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.), Japan, Canada, Europe, Oceania, China and Korea. **All markets are included in data for Q1 2020; data for the remainder of 2020 is limited to U.S. West and U.S. East, due to impacts of the COVID-19 pandemic.**

**Impact of COVID-19** – In December 2019 and January 2020, the initial cases of novel coronavirus (2019-nCoV)-infected pneumonia (NCIP) occurred in Wuhan, Hubei Province, China. The first COVID-19 case in Hawaii was confirmed March 6, 2020<sup>1</sup>. By late March 2020, concerns around the virus and related travel restrictions resulted in suspended flights to and from Canada, China, Japan, Korea and Oceania. Flights to Hawai'i from Japan and Canada resumed in November and December 2020, respectively, but they were very limited and resulted in an insufficient number of visitors to sample for the VSAT study.

# METHODOLOGY – Sample Sizes by Market

The following table shows the number of completed surveys collected by visitors of each of the eight markets who recently finished a trip to Hawai'i. All markets are included in data for Q1 2020; data for the remainder of 2020 is limited to U.S. West and U.S. East, due to COVID-19 travel restrictions that were implemented in March 2020 and were largely in force for the remainder of the year.

Visitor Market	Completed	Margin of Error $\pm^2$	Response Rate
U.S. West	12,244	0.89	20.85%
U.S. East	7,450	1.14	19.36%
Japan <sup>1</sup>	2,209	2.09	77.95%
Canada <sup>1</sup>	1,689	2.38	24.22%
Europe <sup>1</sup>	343	5.29	20.60%
Oceania <sup>1</sup>	323	5.45	19.61%
China <sup>1</sup>	73	11.47	11.03%
Korea <sup>1</sup>	306	5.60	33.55%
<b>All visitor markets</b>	24,637	0.62	22.02%

<sup>1</sup>Includes data collected in Q1 2020 only.

<sup>2</sup>Margins of error are presented at the 95 percent level of confidence.

# METHODOLOGY – Data Collection

Monthly samples of visitors who stayed for at least two days were drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data was also collected in Q1 2020 only via intercept surveys at the Daniel K. Inouye International Airport, Ellison Onizuka Kona International Airport and Kahului Airport using iPad tablets among departing Chinese, Japanese and Korean visitors. Data collected via email and from the iPad intercept surveys were merged to form a single database for analysis.

Collected data was statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data was statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Data from all markets were reported as weighted data based on weights generated for 2020 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all markets.

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 Safe Travels Hawai'i Program

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

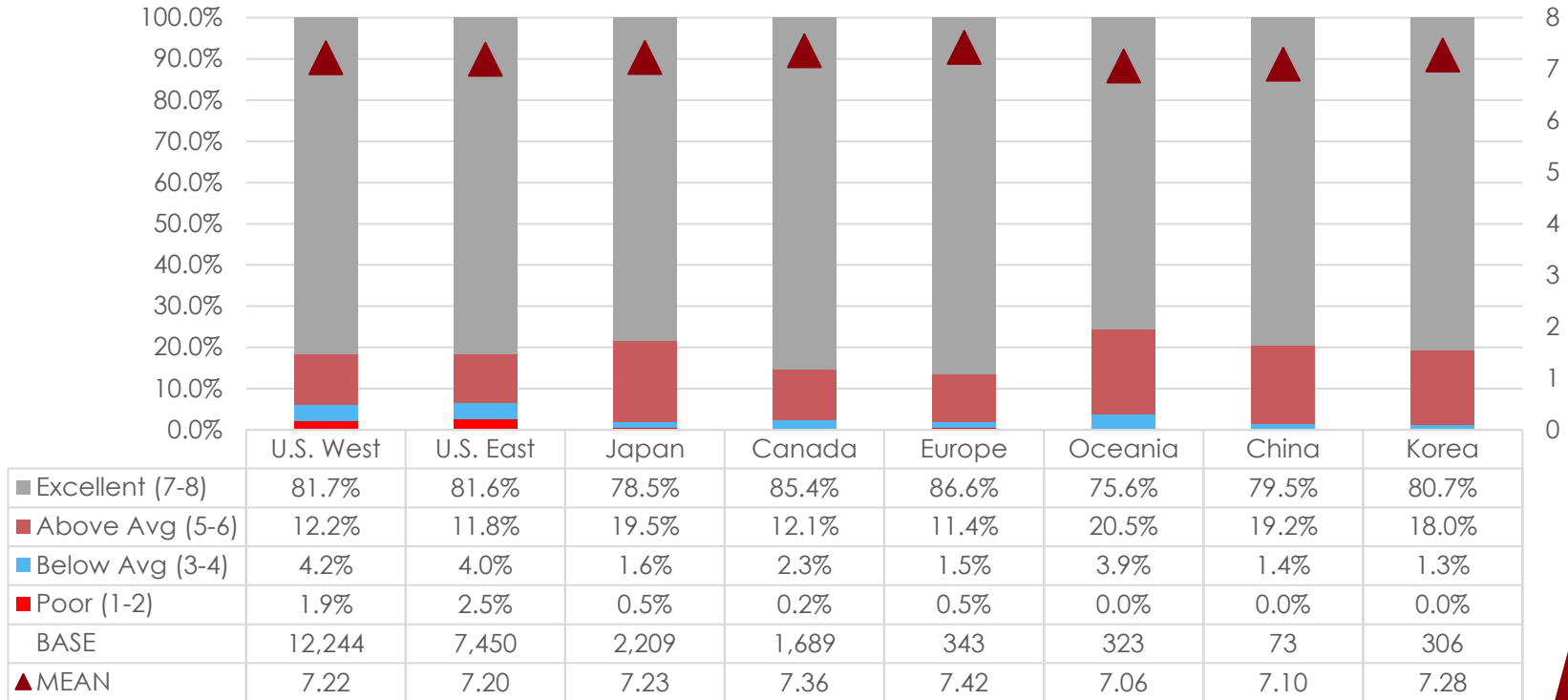
On March 26, 2020, the State of Hawai'i started requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day self-quarantine. Effective October 15, 2020, visitors and returning residents could avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawai'i. On December 4, the mandatory quarantine period was reduced from 14 days to 10 days.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – VISITOR SATISFACTION

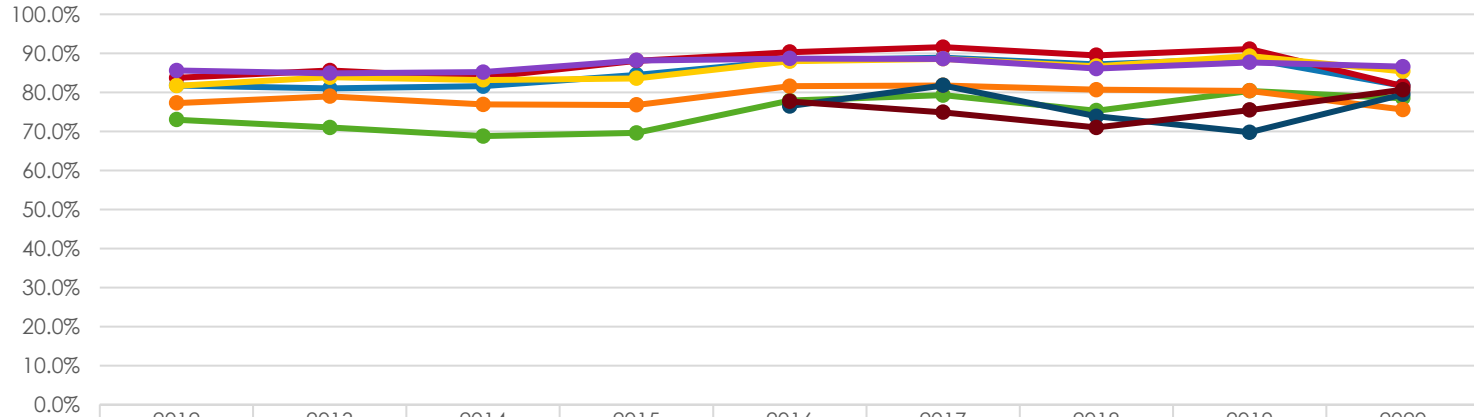
# SATISFACTION – STATE OF HAWAI‘I BY Market

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



# SATISFACTION – STATE OF HAWAI‘I BY Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	81.8%	81.0%	81.6%	84.5%	88.2%	88.9%	87.2%	88.7%	81.7%
U.S. East	83.7%	85.6%	83.8%	88.1%	90.3%	91.6%	89.5%	91.1%	81.6%
Japan	73.0%	71.0%	68.8%	69.6%	77.9%	79.3%	75.3%	80.4%	78.5%
Canada	81.7%	83.9%	83.2%	83.6%	88.0%	88.6%	86.7%	89.3%	85.4%
Europe	85.6%	84.9%	85.2%	88.2%	88.7%	88.6%	86.1%	87.7%	86.6%
Oceania	77.3%	79.0%	76.9%	76.8%	81.6%	81.8%	80.7%	80.4%	75.6%
China					76.5%	81.8%	73.9%	69.8%	79.5%
Korea					77.7%	74.9%	71.0%	75.5%	80.7%



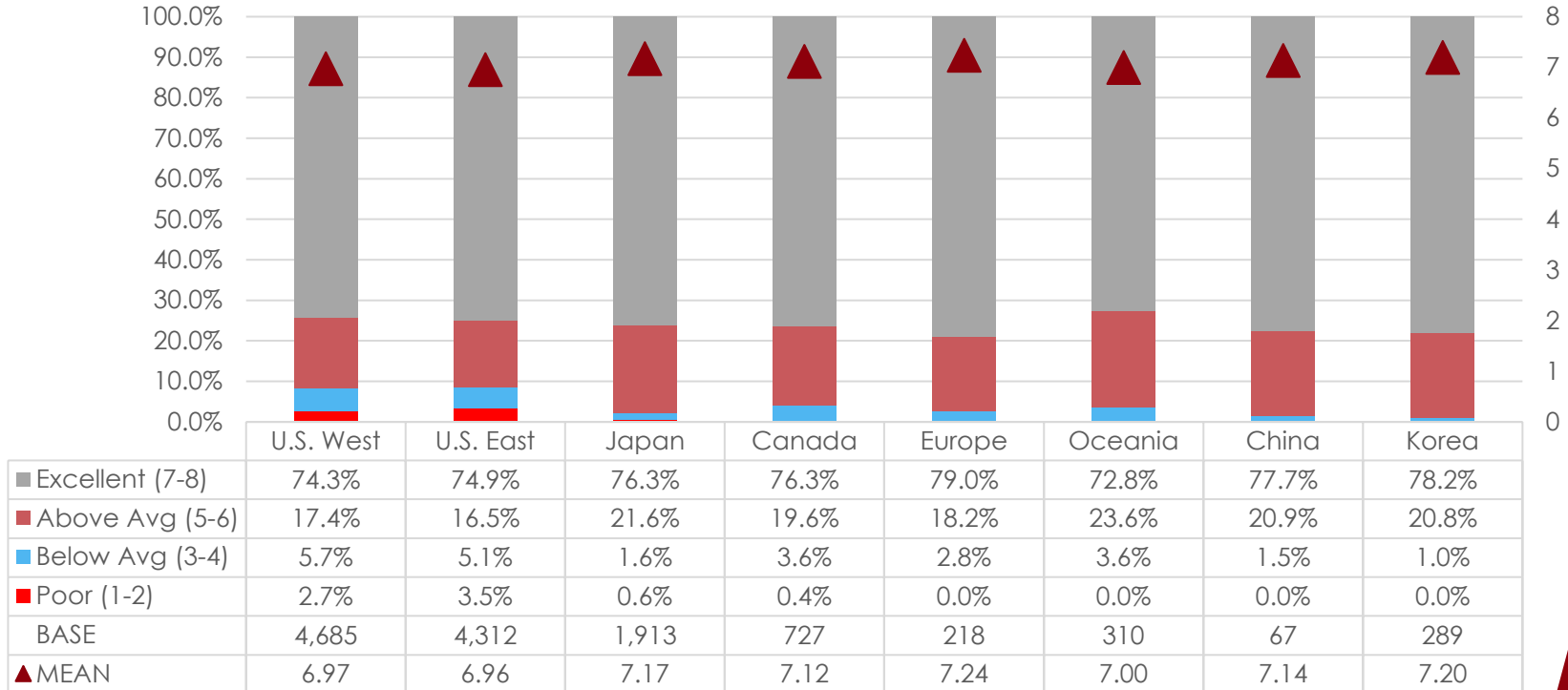
# OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger visitors under the age of 35 from the following visitor markets were more satisfied with their trip than older visitors, particularly seniors: U.S. West, U.S. East, Japan, and Korea.
- Female visitors from the following visitor markets gave higher satisfaction score than their male counterparts: U.S. West, U.S. East, and Canada.
- Visitors from U.S. West whose trip consisted of visiting just a single island gave higher satisfaction scores. At the opposite end, visitors from U.S. East and Japan who visited multiple islands during their stay gave higher satisfaction scores.
- First-time visitors to Hawai'i from U.S. West, U.S. East, and Japan were more satisfied with their most recent trip while repeat visitors from Oceania and China were more satisfied than first-time visitors from these markets.

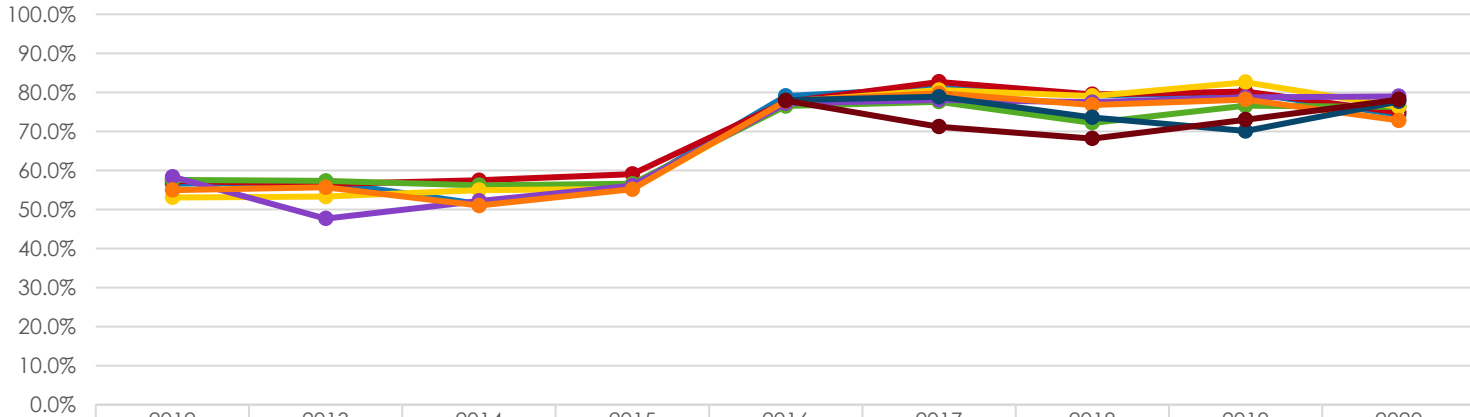
# SATISFACTION – O‘AHU BY Market

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



# SATISFACTION – O‘AHU BY Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	56.6%	57.1%	51.4%	55.9%	79.1%	81.1%	79.2%	80.0%	74.3%
U.S. East	57.3%	56.5%	57.5%	59.1%	77.6%	82.7%	79.5%	80.2%	74.9%
Japan	57.6%	57.3%	56.2%	56.6%	76.5%	77.6%	72.2%	76.6%	76.3%
Canada	53.1%	53.3%	55.0%	55.3%	77.6%	80.6%	79.1%	82.6%	76.3%
Europe	58.4%	47.7%	52.2%	56.1%	77.2%	78.1%	77.5%	78.7%	79.0%
Oceania	55.0%	55.7%	51.0%	55.2%	77.8%	79.8%	76.8%	78.2%	72.8%
China					78.0%	78.9%	73.6%	70.1%	77.7%
Korea					77.9%	71.2%	68.2%	73.0%	78.2%

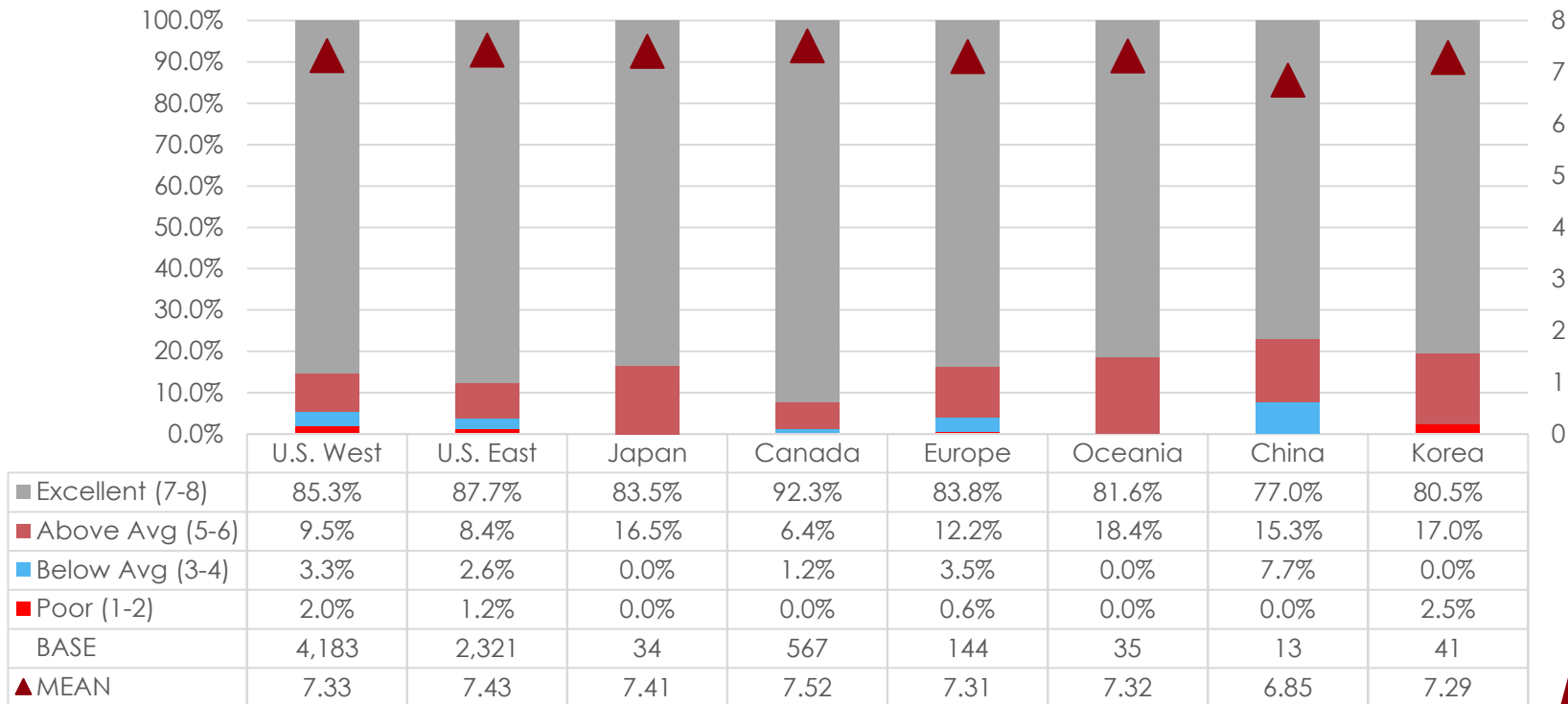
# SATISFACTION – O‘AHU BY Market

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger visitors, particularly those under the age of 35 from U.S. West, U.S. East, Japan, Canada, and Korea tended to be the most satisfied overall with their visit on O‘ahu.
- Visitors without a college degree from Korea were more satisfied with their stay on O‘ahu than visitors with a college degree from this market.
- When segmented by gender, we find females from U.S. West and U.S. East, were more satisfied with their visit to O‘ahu than were males from these visitor markets.
- Less affluent visitors from U.S. East were more satisfied with their stay than more affluent travelers from this visitor market.
- Those who only visited O‘ahu during their stay in Hawai‘i were more satisfied with their trip than those who visited multiple islands in the following markets: U.S. West, Japan, Canada, Europe, Oceania, and Korea.

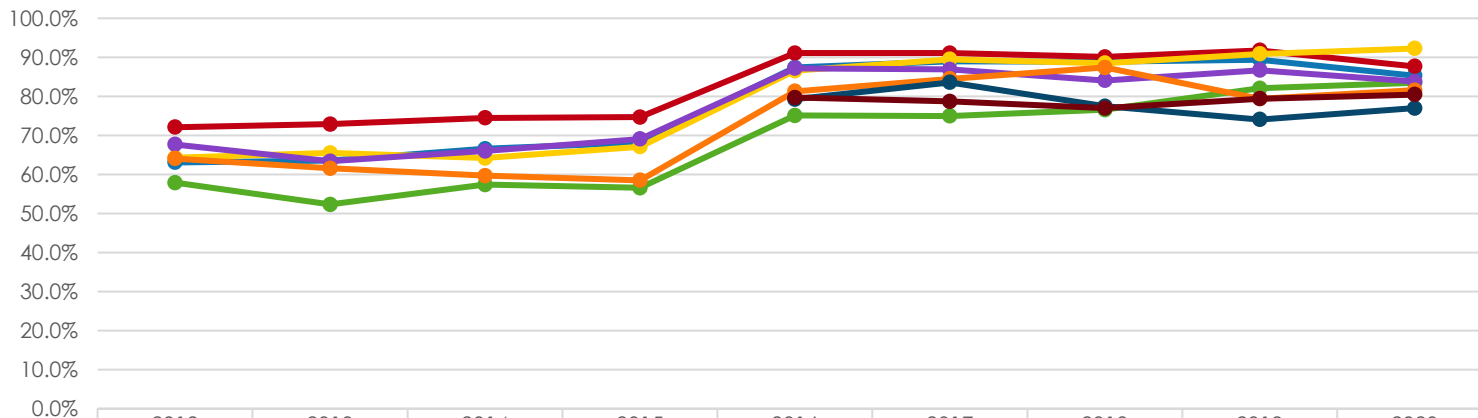
# SATISFACTION – MAUI BY Market

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



# SATISFACTION – MAUI BY Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	63.1%	63.6%	66.6%	68.2%	87.4%	89.0%	88.9%	89.4%	85.3%
U.S. East	72.1%	72.9%	74.5%	74.7%	91.1%	91.1%	90.1%	91.8%	87.7%
Japan	57.9%	52.3%	57.4%	56.6%	75.1%	75.0%	76.6%	82.1%	83.5%
Canada	64.3%	65.5%	64.2%	67.1%	86.6%	89.5%	88.5%	90.9%	92.3%
Europe	67.7%	63.4%	66.0%	69.1%	87.2%	86.9%	84.1%	86.7%	83.8%
Oceania	64.1%	61.6%	59.7%	58.5%	81.3%	84.5%	87.4%	79.4%	81.6%
China					79.3%	83.6%	77.5%	74.1%	77.0%
Korea					79.7%	78.7%	77.0%	79.4%	80.5%

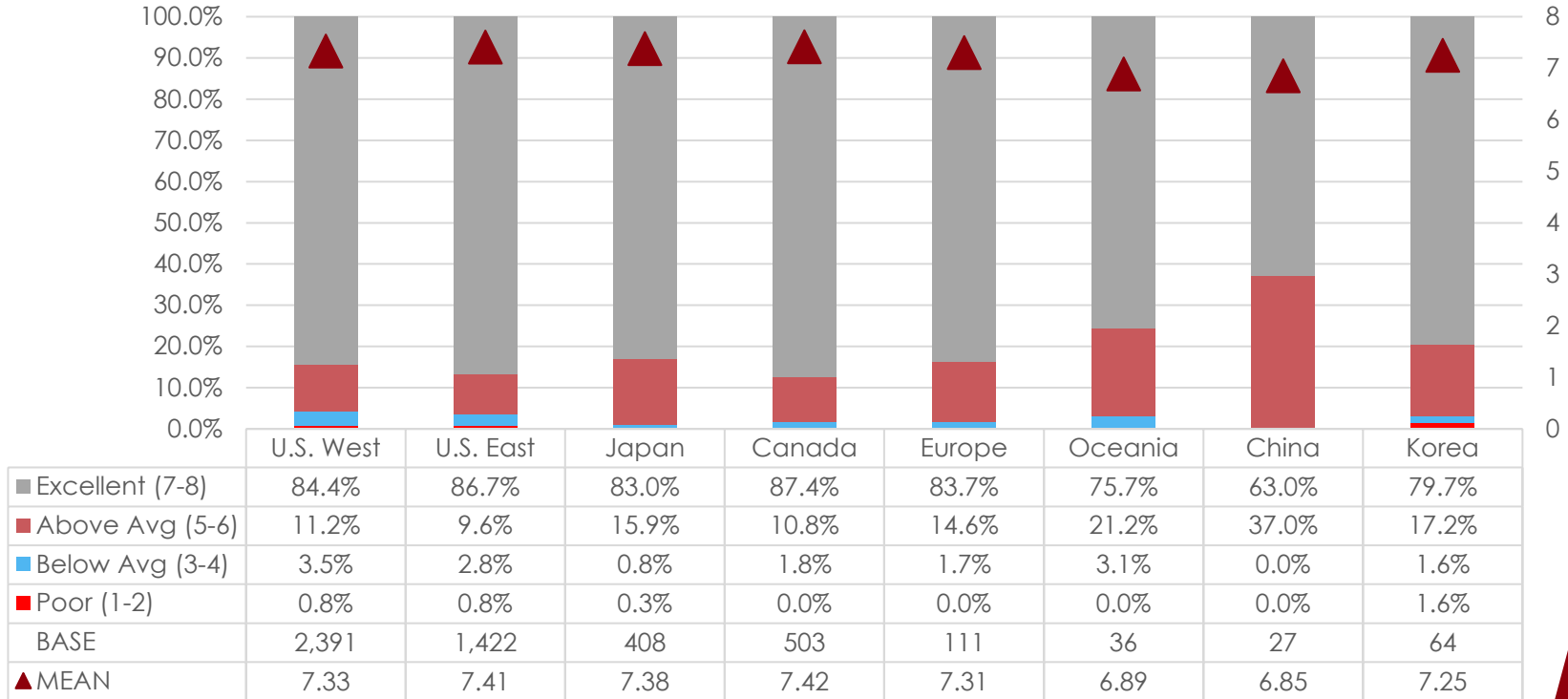
# SATISFACTION – MAUI BY Market

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger visitors from U.S. West, U.S. East, Japan, and Canada were more satisfied with their stay on Maui.
- Visitors to Maui from U.S. West and U.S. East without a college degree had higher levels of satisfaction with their stay on the island compared to those with a college degree.
- Females from U.S. West, U.S. East, and Canada gave higher satisfaction scores for Maui than their male counterparts. Conversely, males from Japan were more satisfied with their stay on Maui than were females.
- Less affluent visitors from Canada were more satisfied with their stay on Maui compared to wealthier visitors from this market.

# SATISFACTION – HAWAI‘I ISLAND BY Market

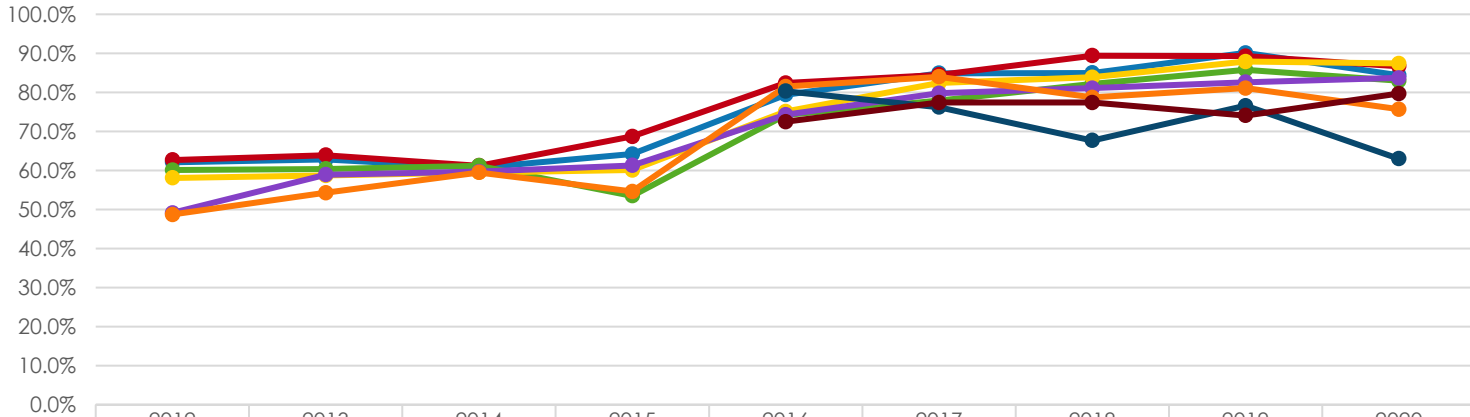
8-pt Rating Scale  
8=Excellent / 1=Poor





# SATISFACTION – HAWAI‘I ISLAND BY Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	62.1%	62.8%	60.7%	64.2%	79.4%	84.9%	85.0%	90.1%	84.4%
U.S. East	62.7%	63.9%	61.2%	68.7%	82.4%	84.5%	89.4%	89.3%	86.7%
Japan	60.1%	60.4%	61.2%	53.5%	74.2%	77.9%	82.2%	85.8%	83.0%
Canada	58.1%	58.7%	59.5%	60.1%	75.1%	82.4%	83.9%	87.9%	87.4%
Europe	49.1%	58.9%	59.7%	61.3%	74.3%	79.8%	81.1%	82.6%	83.7%
Oceania	48.7%	54.3%	59.5%	54.6%	81.5%	84.0%	78.7%	81.1%	75.7%
China					80.3%	76.2%	67.7%	76.6%	63.0%
Korea					72.5%	77.4%	77.4%	74.1%	79.7%

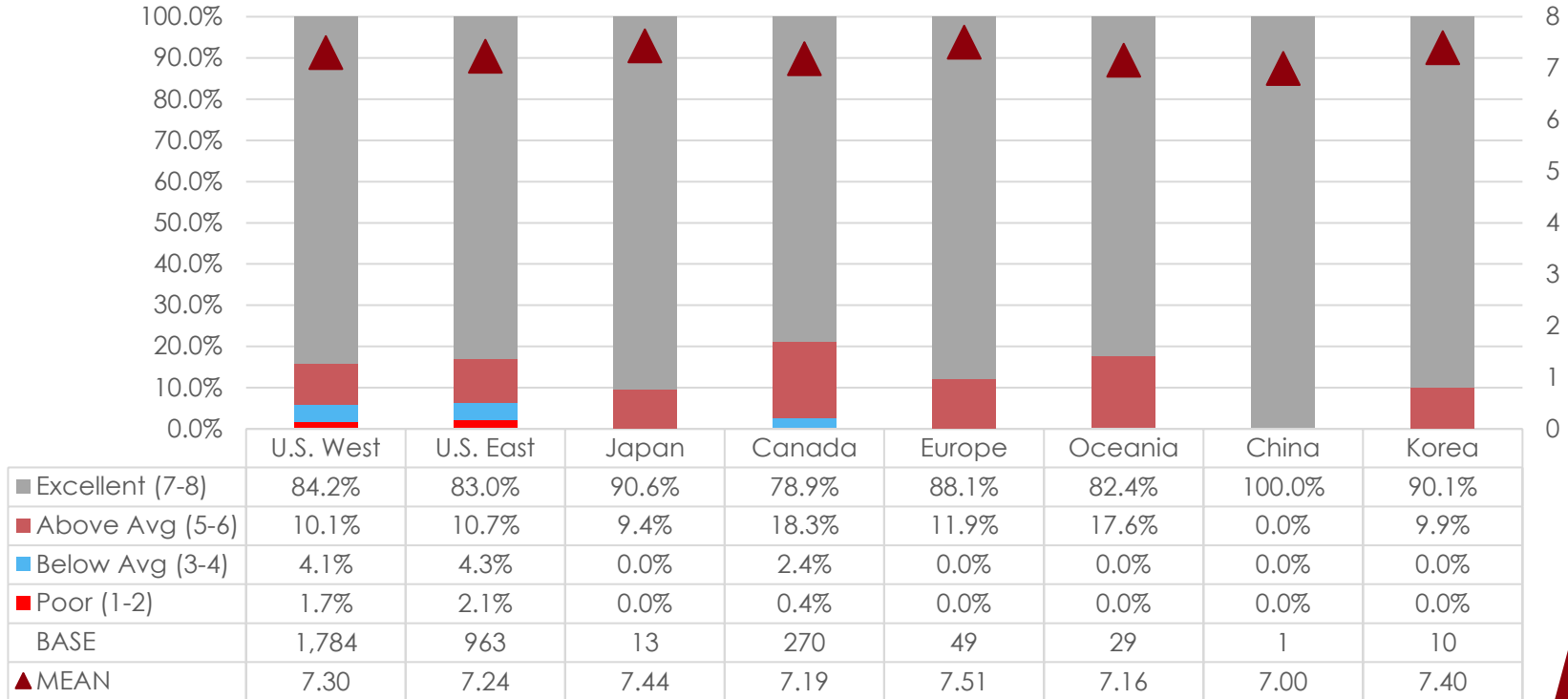
# SATISFACTION – HAWAI'I ISLAND BY Market

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Those with a college degree were more satisfied with their stay on Hawai'i Island compared to less educated segments in the following markets: U.S. West and Canada.
- When segmented by gender, we find female visitors from U.S. West were more satisfied with their stay on Hawai'i Island than were males. Conversely, male visitors from Oceania provided higher mean scores for their trip compared to females from this market.
- Visitors from U.S. West and Canada whose trip was to Hawai'i Island exclusively were more satisfied with their stay than those from this visitor market who also visited another Hawaiian Island during their stay.
- Repeat visitors to Hawai'i were the most satisfied with their trip to Hawai'i Island compared to first-time visitors.
- Travelers from U.S. West and U.S. East who visited in larger travel parties gave higher satisfaction scores.

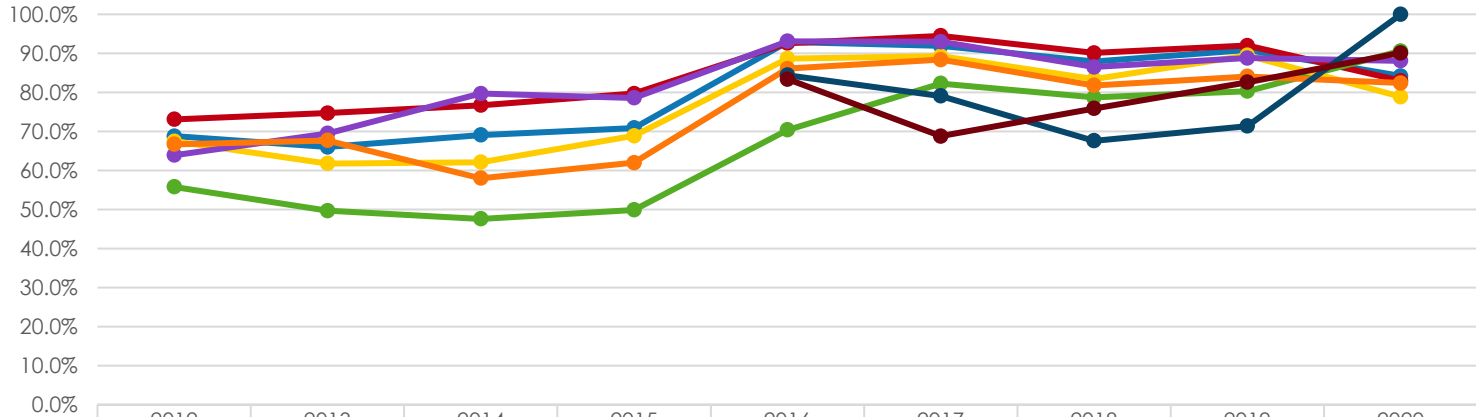
# SATISFACTION – KAUA‘I BY Market

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



# SATISFACTION – KAUA‘I BY Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	68.8%	66.0%	69.1%	70.9%	92.9%	91.9%	87.9%	90.9%	84.2%
U.S. East	73.1%	74.7%	76.7%	79.7%	92.6%	94.5%	90.1%	92.0%	83.0%
Japan	55.8%	49.7%	47.6%	49.9%	70.4%	82.3%	78.7%	80.3%	90.6%
Canada	67.5%	61.8%	62.1%	68.9%	88.7%	89.3%	83.4%	89.5%	78.9%
Europe	63.9%	69.5%	79.7%	78.6%	93.1%	93.0%	86.5%	88.8%	88.1%
Oceania	66.7%	67.7%	58.0%	62.0%	86.1%	88.4%	81.8%	84.1%	82.4%
China					84.4%	79.1%	67.6%	71.4%	100.0%
Korea					83.4%	68.8%	75.9%	82.6%	90.1%

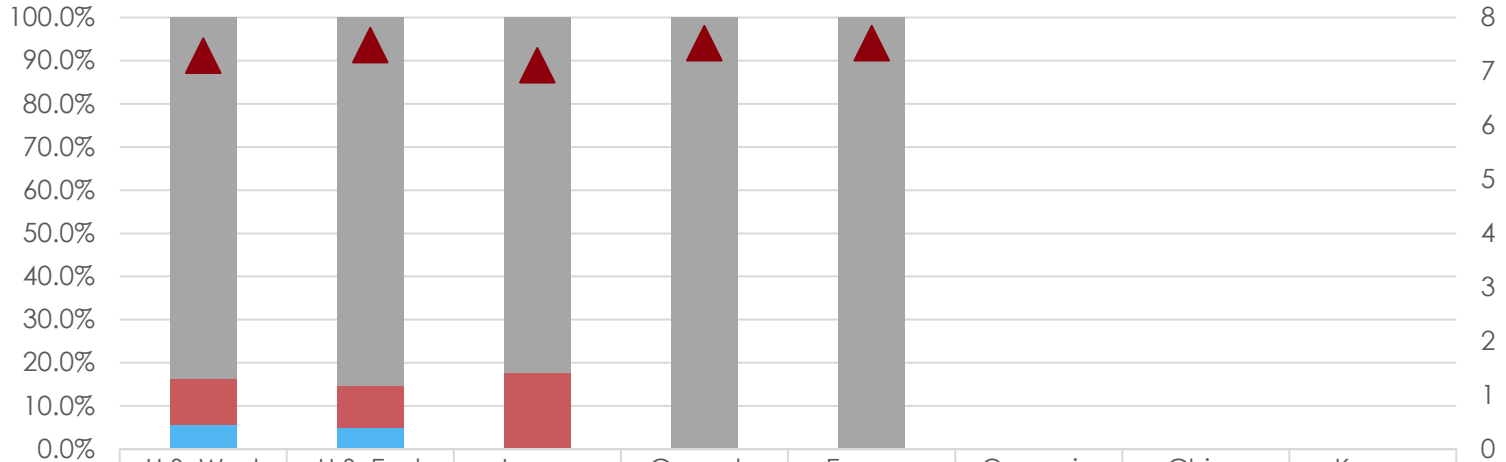
# SATISFACTION – KAUA‘I BY Market

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Young adults under the age of 35 from U.S. West more satisfied with their visit to Kaua‘i than were older travelers from this market.
- College graduates from Oceania were more satisfied with their stay on the island compared to those without a college degree from this visitor market.
- Female travelers from the following markets gave higher scores for their visit compared to males: U.S. West and U.S. East.
- Satisfaction is higher amongst less affluent travelers from U.S. West and Canada when asked about their stay on Kaua‘i.
- Those visitors from U.S. West and Japan whose trip was limited to just Kauai gave higher satisfaction scores for the island compared to those who visited other islands as well during their trip.
- First-time visitors to Hawai‘i / Kaua‘i gave higher satisfaction scores compared to repeat visitors to the state in the following visitor markets: U.S. West and Canada.

# SATISFACTION – MOLOKA‘I BY Market

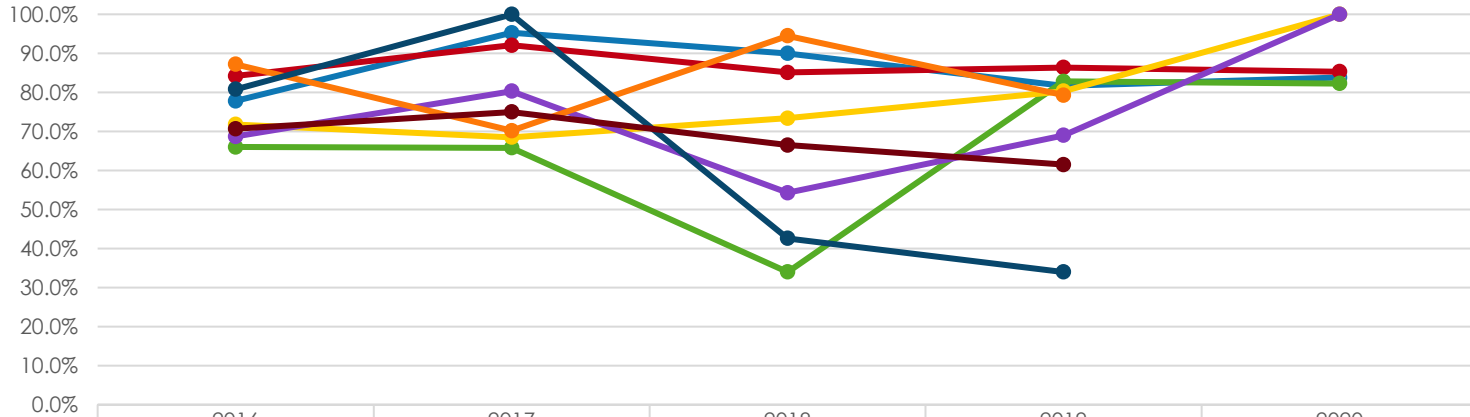
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	83.8%	85.3%	82.3%	100.0%	100.0%			
■ Above Avg (5-6)	10.5%	9.8%	17.7%	0.0%	0.0%			
■ Below Avg (3-4)	5.7%	4.9%	0.0%	0.0%	0.0%			
■ Poor (1-2)	0.0%	0.0%	0.0%	0.0%	0.0%			
BASE	100	102	6	8	4			
▲ MEAN	7.30	7.49	7.12	7.52	7.53			

# SATISFACTION – MOLOKA‘I BY Market

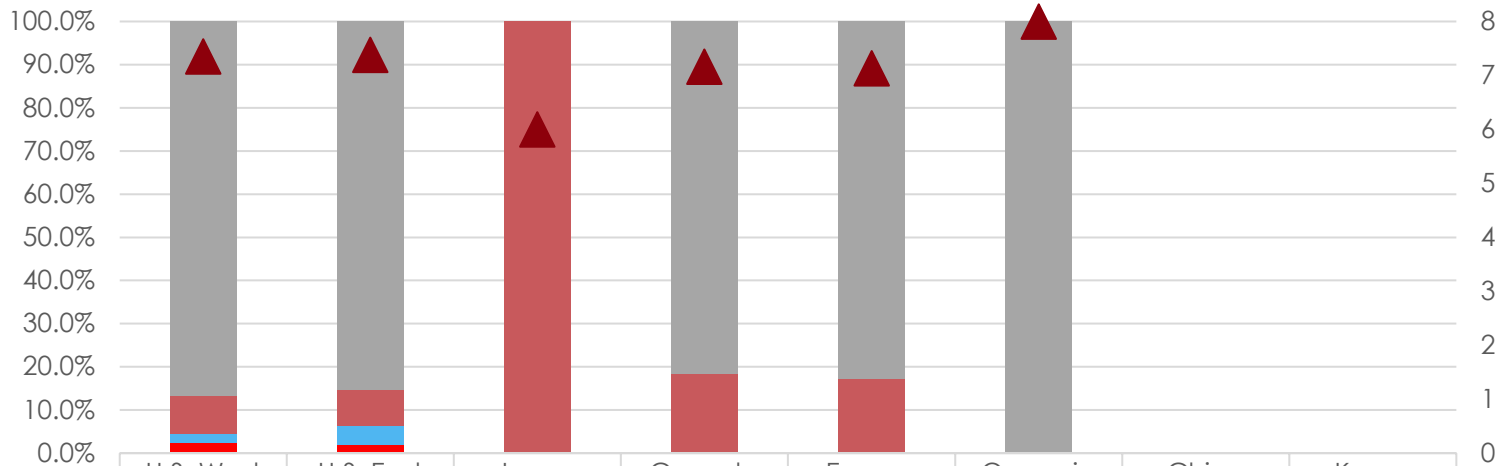
Tracking Data – Rating of “Excellent” (7-8)



	2016	2017	2018	2019	2020
U.S. West	77.8%	95.3%	90.0%	81.7%	83.8%
U.S. East	84.2%	92.1%	85.1%	86.4%	85.3%
Japan	66.0%	65.8%	34.0%	82.8%	82.3%
Canada	71.8%	68.5%	73.4%	80.3%	100.0%
Europe	68.7%	80.3%	54.3%	69.0%	100.0%
Oceania	87.2%	70.2%	94.5%	79.3%	
China	80.8%	100.0%	42.6%	34.0%	
Korea	70.7%	75.0%	66.5%	61.5%	

# SATISFACTION – LANA 'I BY Market

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

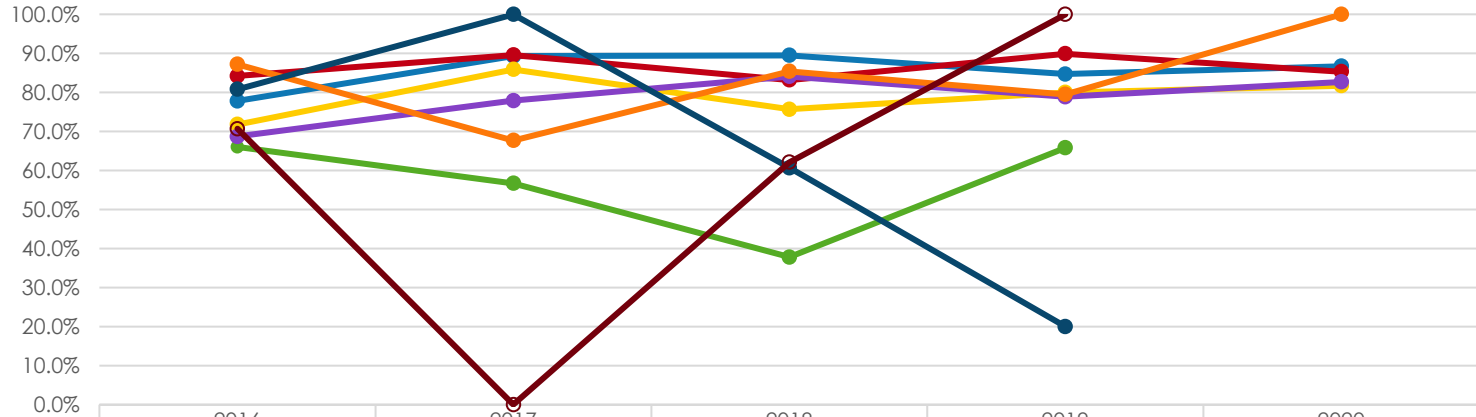


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	86.7%	85.3%	0.0%	81.7%	82.7%	100.0%		
■ Above Avg (5-6)	8.7%	8.2%	100.0%	18.3%	17.3%	0.0%		
■ Below Avg (3-4)	2.1%	4.6%	0.0%	0.0%	0.0%	0.0%		
■ Poor (1-2)	2.4%	1.8%	0.0%	0.0%	0.0%	0.0%		
BASE	92	109	1	11	6	1		
▲ MEAN	7.35	7.39	6.00	7.17	7.14	8.00		



# SATISFACTION – LANA 'I BY Market

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

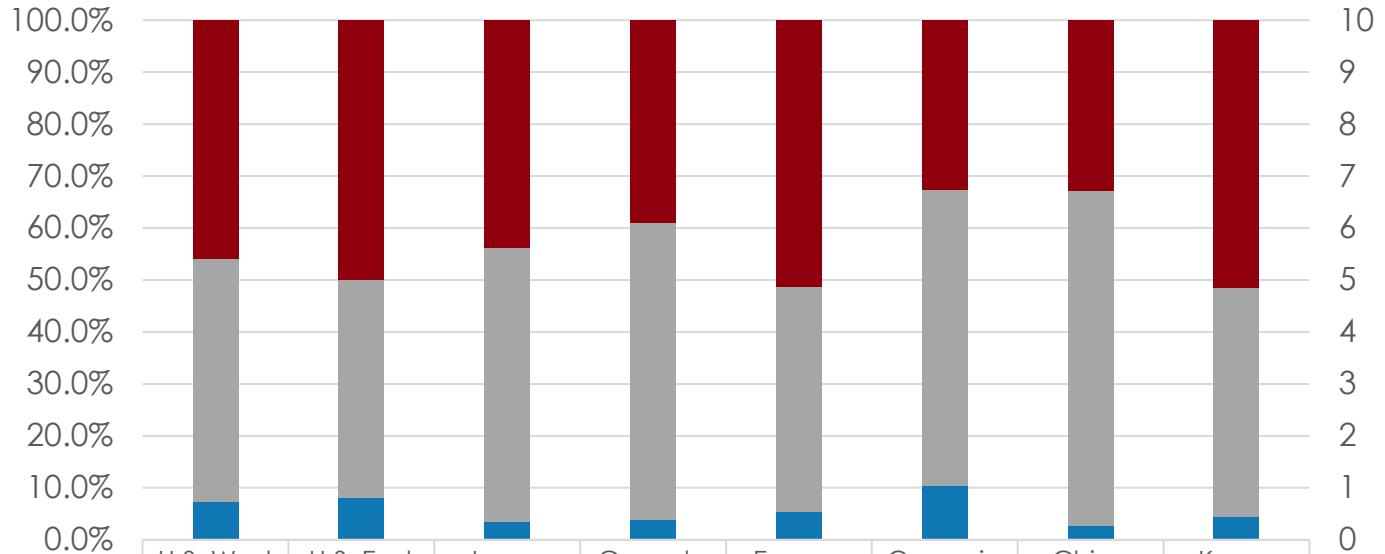


	2016	2017	2018	2019	2020
U.S. West	77.8%	89.3%	89.5%	84.7%	86.7%
U.S. East	84.2%	89.6%	83.2%	89.9%	85.3%
Japan	66.0%	56.7%	37.8%	65.8%	
Canada	71.8%	85.9%	75.7%	80.0%	81.7%
Europe	68.7%	77.9%	84.1%	78.9%	82.7%
Oceania	87.2%	67.7%	85.4%	79.5%	100.0%
China	80.8%	100.0%	60.7%	20.0%	
Korea	70.7%		62.1%	100.0%	

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRIP EXPECTATIONS

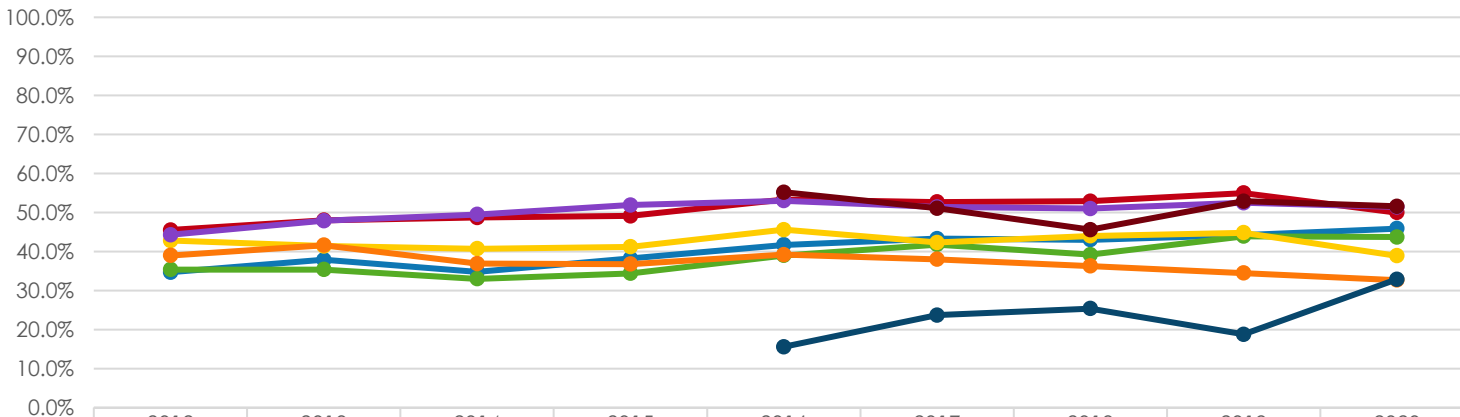
# HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Exceeded expectations	45.9%	50.0%	43.7%	38.9%	51.4%	32.7%	32.9%	51.6%
■ Met expectations	46.8%	41.9%	52.8%	57.2%	43.2%	56.7%	64.3%	43.9%
■ Did NOT meet expectations	7.3%	8.2%	3.5%	3.9%	5.4%	10.5%	2.7%	4.6%
BASE	12,244	7,450	2,209	1,689	343	323	73	306

# HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	34.7%	37.9%	34.8%	38.2%	41.7%	43.3%	43.0%	44.2%	45.9%
U.S. East	45.5%	48.0%	48.7%	49.1%	53.3%	52.7%	52.9%	55.0%	50.0%
Japan	35.4%	35.4%	33.0%	34.4%	39.0%	41.8%	39.2%	43.9%	43.7%
Canada	42.8%	41.4%	40.7%	41.2%	45.6%	42.3%	44.0%	44.8%	38.9%
Europe	44.3%	47.9%	49.5%	51.9%	53.0%	51.4%	51.0%	52.5%	51.4%
Oceania	39.0%	41.6%	36.9%	36.8%	39.2%	38.0%	36.3%	34.5%	32.7%
China					15.6%	23.7%	25.4%	18.8%	32.9%
Korea					55.2%	51.1%	45.6%	52.9%	51.6%

# HAWAI'I TRIP EXPECTATIONS

## COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

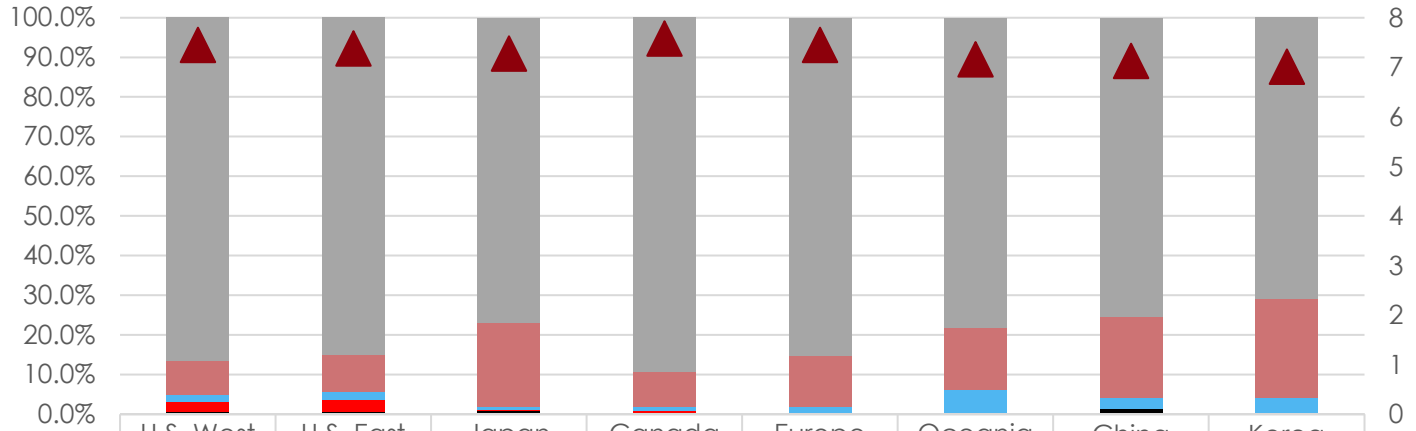
- Seniors were the least likely to respond that the trip exceeded their expectations in the following visitor markets: U.S. West, U.S. East, Japan, and Canada.
- More educated travelers or those with a college degree from U.S. West and U.S. East were more likely to feel positively about their trip in terms of their prior expectations. Conversely the results were the opposite for Korean travelers where less educated segments from this market were more satisfied.
- When segmented by gender, we find females more likely to respond that the trip exceeded their expectations in the following visitor markets: U.S. West, U.S. East, and Canada.
- Visitors whose trip included stops on multiple islands gave higher satisfaction scores in the following visitor markets: U.S. East and Oceania.
- First-time visitors to the state were more likely to feel the trip met or exceeded their expectation from the following markets: U.S. West, U.S. East, Japan, Canada, Europe, and Korea.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – BRAND/ DESTINATION ADVOCACY

# BRAND/DESTINATION – ADVOCACY

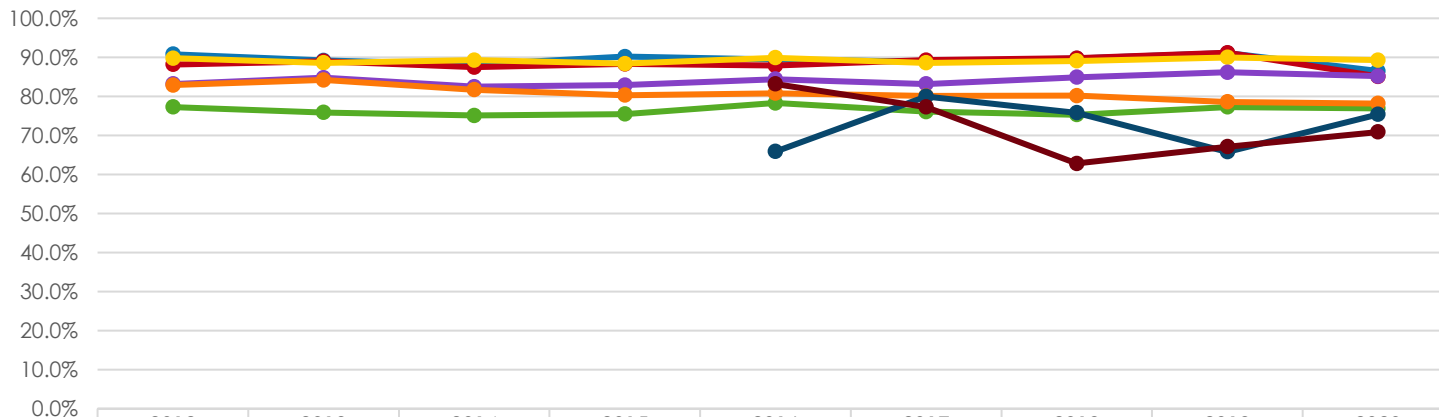
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	86.5%	85.1%	76.9%	89.3%	85.2%	78.2%	75.4%	70.9%
■ Somewhat likely (5-6)	8.4%	9.2%	21.1%	8.7%	12.9%	15.7%	20.5%	24.8%
■ Somewhat unlikely (3-4)	1.9%	2.2%	0.9%	1.2%	1.5%	5.8%	2.7%	3.9%
■ Very unlikely (1-2)	2.6%	2.9%	0.3%	0.6%	0.3%	0.3%	0.0%	0.0%
■ Not Sure	0.6%	0.7%	0.8%	0.2%	0.0%	0.0%	1.4%	0.3%
BASE	12244	7450	2209	1689	343	323	73	306
▲ MEAN	7.45	7.38	7.28	7.58	7.45	7.16	7.13	7.01

# BRAND/DESTINATION – ADVOCACY

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	90.8%	89.2%	88.2%	90.2%	89.5%	88.9%	89.7%	91.1%	86.5%
U.S. East	88.2%	89.0%	87.5%	88.3%	87.9%	89.3%	89.8%	91.2%	85.1%
Japan	77.3%	75.9%	75.1%	75.5%	78.3%	76.1%	75.3%	77.3%	76.9%
Canada	89.8%	88.6%	89.3%	88.4%	89.9%	88.6%	89.1%	90.0%	89.3%
Europe	83.2%	84.8%	82.5%	82.9%	84.4%	83.2%	84.9%	86.2%	85.2%
Oceania	82.9%	84.2%	81.7%	80.3%	80.8%	80.1%	80.2%	78.6%	78.2%
China					65.9%	80.0%	75.8%	65.8%	75.4%
Korea					83.2%	77.3%	62.8%	67.1%	70.9%



# BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

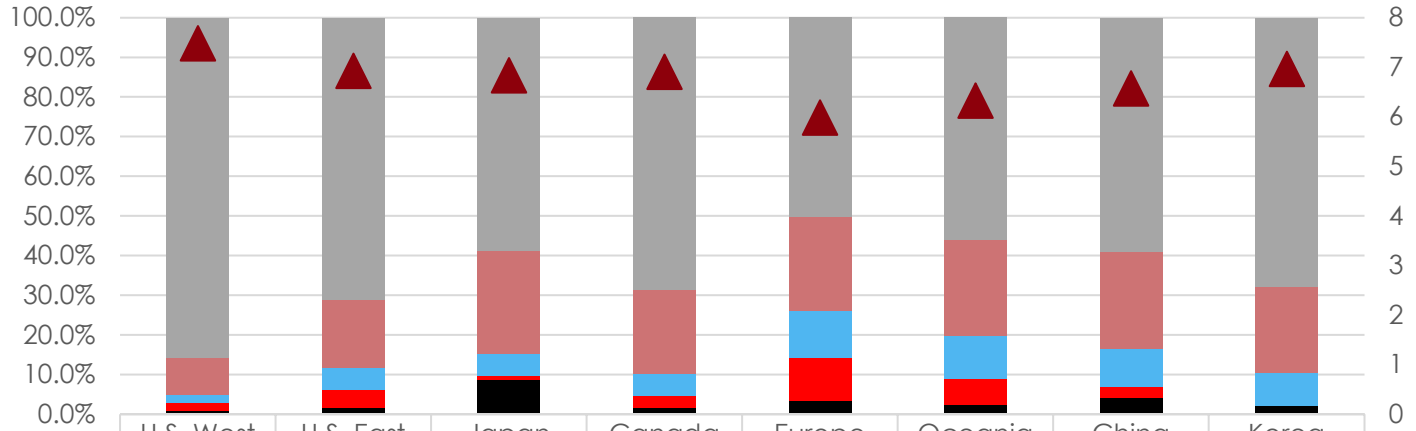
- Visitors from U.S. West under the age of 50 are stronger advocates for Hawai'i compared to travelers over 50 from this market. Visitors from U.S. East under 35 were the most likely to recommend the state to others. In the Japan market, seniors were the least likely to recommend Hawai'i to others.
- Visitors Oceania without a college degree were more likely to recommend Hawai'i than visitors from these two markets with a college degree. Conversely the opposite was true among Chinese visitors where more educated travelers were more likely to be advocates for the state.
- Female visitors appeared to be stronger advocates for Hawai'i than male visitors from these markets: U.S. West, U.S. East, Japan, Europe, and Canada.
- Repeat visitors from Canada and Oceania were more likely to recommend Hawai'i to others than were first-time visitors from these markets.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – BRAND/ DESTINATION LOYALTY

# LIKELIHOOD OF RETURN VISIT

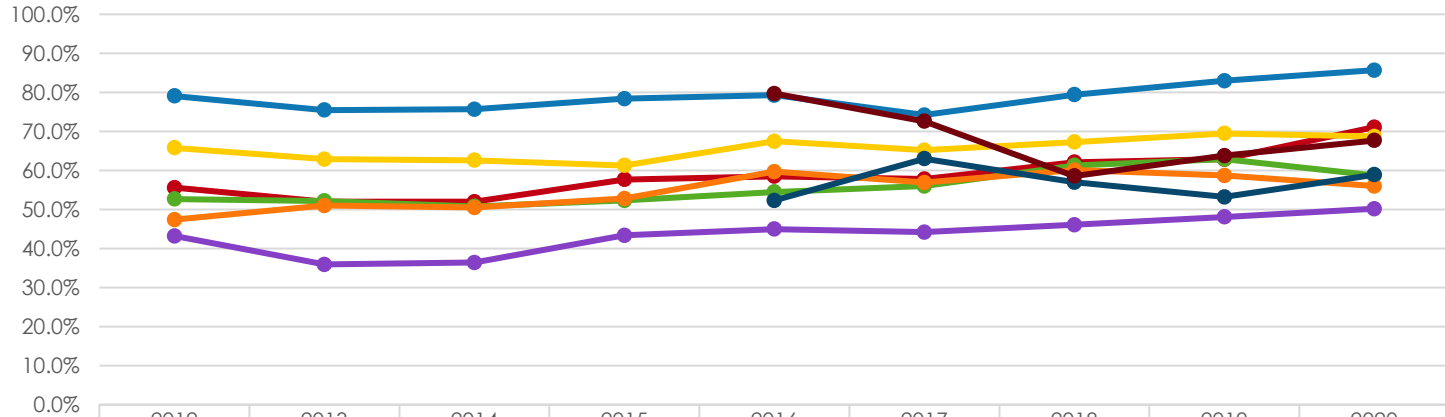
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	85.7%	71.1%	58.7%	68.7%	50.2%	56.0%	58.9%	67.7%
■ Somewhat likely (5-6)	9.5%	17.1%	25.9%	21.1%	23.7%	24.3%	24.7%	21.9%
■ Somewhat unlikely (3-4)	1.9%	5.6%	5.7%	5.5%	11.6%	10.7%	9.6%	8.1%
■ Very unlikely (1-2)	2.1%	4.5%	0.8%	3.1%	10.9%	6.5%	2.7%	0.0%
■ Not Sure	0.8%	1.7%	8.8%	1.6%	3.5%	2.5%	4.1%	2.3%
BASE	12,244	7,450	2,209	1,689	343	323	73	306
▲ MEAN	7.48	6.93	6.84	6.90	5.98	6.33	6.57	6.97

# LIKELIHOOD OF RETURN VISIT

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020
U.S. West	79.1%	75.5%	75.7%	78.4%	79.3%	74.2%	79.4%	83.0%	85.7%
U.S. East	55.6%	52.0%	52.0%	57.7%	58.5%	57.8%	62.1%	62.9%	71.1%
Japan	52.7%	52.2%	50.8%	52.3%	54.5%	56.0%	61.3%	62.9%	58.7%
Canada	65.8%	62.9%	62.6%	61.3%	67.5%	65.2%	67.3%	69.5%	68.7%
Europe	43.2%	35.9%	36.4%	43.4%	45.0%	44.2%	46.1%	48.1%	50.2%
Oceania	47.4%	51.0%	50.5%	52.8%	59.7%	56.9%	60.1%	58.7%	56.0%
China					52.3%	63.0%	57.0%	53.2%	58.9%
Korea					79.7%	72.6%	58.6%	63.8%	67.7%

# LIKELIHOOD OF RETURN VISIT

## COMPARISON OF MEANS REVEAL THE FOLLOWING:

- In the Japan market, visitors under the age of 35, appear to be the least likely to return.
- In the U.S. West market, visitors between the ages of 35 and 64 were more likely to return to Hawai'i than were younger (under 35) and older (65+) visitors.
- Less educated visitors or those without a college degree from Japan, Canada, and Oceania were more likely to recommend Hawai'i to others. The opposite was true amongst visitors from U.S. West and China where college graduates were more likely to recommend the state to others.
- Females from U.S. West and U.S. East were also more likely to want to return to Hawai'i than male visitors.
- Among visitors from U.S. West, more affluent respondents were more likely to recommend Hawai'i to others.
- With the sole exception being Chinese visitors, respondents who were repeat visitors from each of the other market segments were more likely to recommend Hawai'i.

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

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
44.8% Too expensive	31.5% COVID-19/ Pandemic
41.6% Want to go someplace new	29.2% Too expensive
26.9% Too crowded/ congested/ traffic	22.3% Unfriendly people/ felt unwelcome
20.9% Too commercialized/ overdeveloped	18.5% Poor value
20.8% Poor value	17.5% Want to go someplace new
13.9% Five years is too soon	13.9% No reason to return/ Nothing new
12.3% No reason to return/ nothing new	10.6% Poor service
11.5% Flight is too long	10.1% Too crowded/ congested/ traffic

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

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
50.9% Too expensive	36.2% Too expensive
43.1% Want to go someplace new	32.3% Want to go someplace new
43.0% Flight is too long	27.3% Flight too long
19.9% Five years is too soon	19.3% COVID-19/ pandemic
14.7% Other financial obligations	14.4% Poor value
14.3% Poor value	13.7% Unfriendly people/ felt unwelcome
12.1% Too crowded/ congested/ traffic	12.2% Five years is too soon
	11.6% Other financial obligations
	10.3% No reason to return/ nothing new

# UNLIKELY TO RETURN – TOP REASONS JAPAN

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
37.4% Too expensive	34.9% Too expensive
29.3% Want to go someplace new	30.1% Five years is too soon
29.3% Other financial obligations	28.6% Want to go someplace new
27.0% Five years is too soon	27.5% Other financial obligations
22.5% Flight is too long	14.8% Flight too long



# UNLIKELY TO RETURN – TOP REASONS CANADA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
55.9% Too expensive	50.4% Too expensive
49.4% Want to go someplace new	47.3% Want to go someplace new
36.0% Flight is too long	30.8% Flight is too long
22.8% Five years is too soon	20.9% Poor value
20.6% Poor value	16.4% Five years is too soon
14.3% Too commercialized/ overdeveloped	15.7% Too commercialized/ overdeveloped
12.5% Other financial obligations	15.4% Too crowded/ congested/ traffic
12.2% Too crowded/ congested/ traffic	11.7% Other financial obligations
10.2% No compelling reason to return	

# UNLIKELY TO RETURN – TOP REASONS EUROPE

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
61.7% Flight is too long	58.0% Flight is too long
50.7% Too expensive	41.8% Too expensive
38.1% Want to go someplace new	30.0% Want to go someplace new
23.1% Five years is too soon	16.0% Other financial obligations
13.1% Too commercialized/ overdeveloped	14.0% Poor value
11.9% Poor value	13.3% Five years is too soon
10.7% Other financial obligations	

# UNLIKELY TO RETURN – TOP REASONS OCEANIA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2019	2020
47.4% Want to go someplace new	57.1% <b>Too expensive</b>
42.5% <b>Too expensive</b>	43.9% Want to go someplace new
29.7% <b>Poor value</b>	37.9% <b>Poor value</b>
27.0% Too commercialized/ overdeveloped	25.3% Too commercialized/ overdeveloped
19.1% Too crowded/ congested/ traffic	18.2% Too crowded/ congested/ traffic
16.2% Five years is too soon	17.8% Flight is too long
13.9% Flight is too long	13.2% No reason to return/ nothing new
	11.4% Five years is too soon

# UNLIKELY TO RETURN – TOP REASONS CHINA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

2018	2020
51.3% Want to go someplace new	66.6% Flight is too long
38.3% Too expensive	50.1% Five years is too soon
36.8% Poor value	41.6% Want to go someplace new
34.7% Flight is too long	25.1% No reason to return/ nothing new
31.0% Five years is too soon	16.6% Too expensive
24.8% No compelling reason to return	

# UNLIKELY TO RETURN – TOP REASONS KOREA

TOP RESPONSES 10%+  
ITEMS HIGHLIGHTED IN RED +/- 5.0 OR GREATER VARIANCE

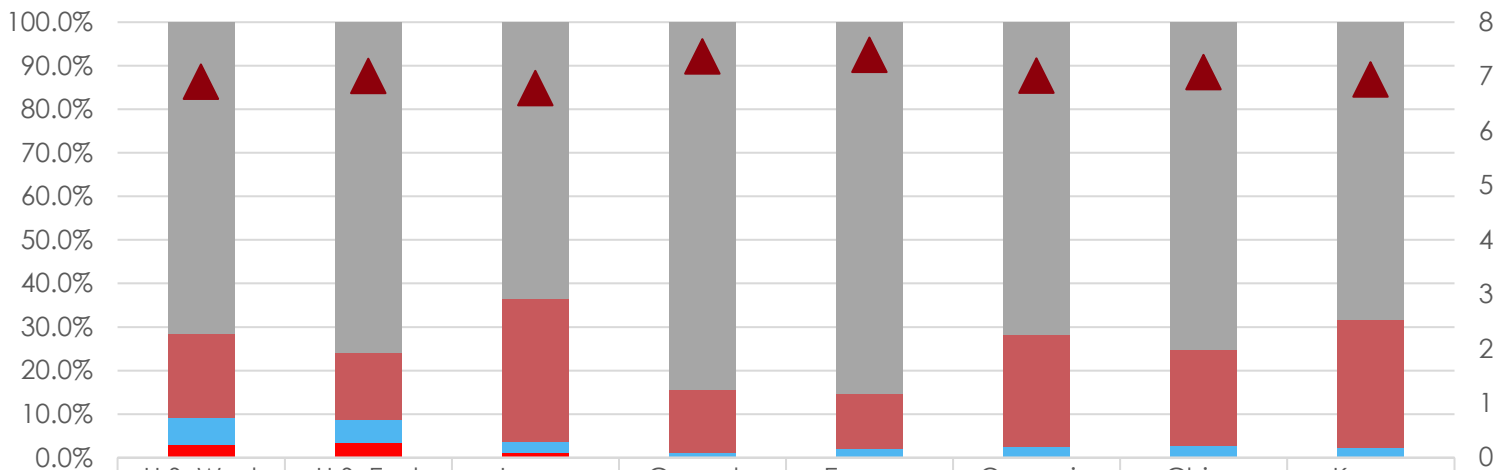
2019	2020
66.7% Too expensive	62.5% Too expensive
40.7% Poor value	34.4% Flight is too long
35.5% Flight is too long	31.1% Poor value
21.8% No reason to return	21.9% Five years is too soon
21.5% Other financial obligations	15.7% Too crowded/ congested/ traffic
19.8% Five years is too soon	12.5% Other financial obligations
16.8% Too crowded/ congested/ traffic	12.5% No reason to return/ nothing new
16.3% Unfriendly people	
13.9% Too commercialized/ overdeveloped	
11.8% Poor service	
11.1% Want to go someplace new	

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION –EXPERIENCES

# OFFERING A VARIETY OF EXPERIENCES

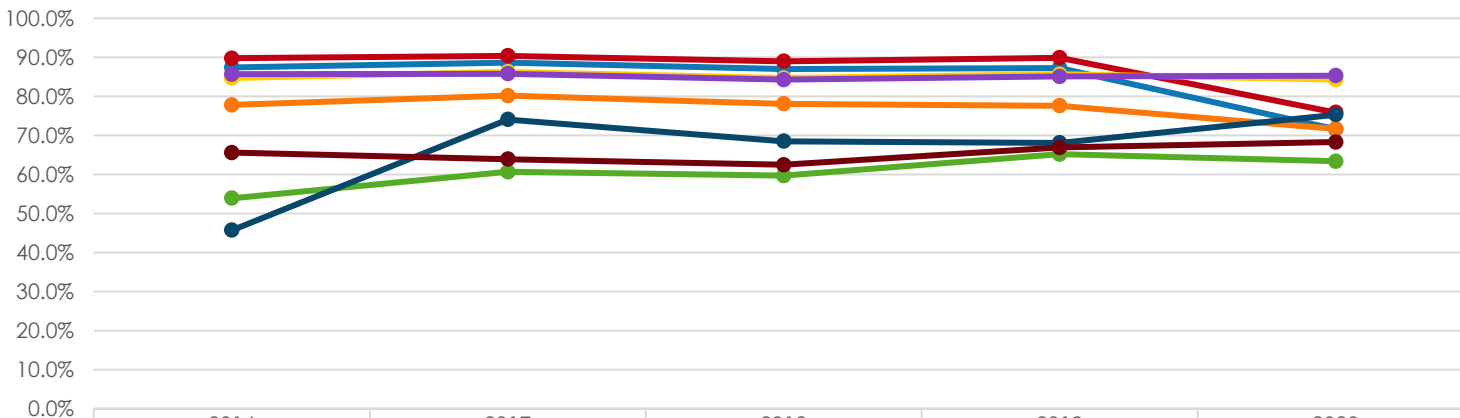
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	71.6%	75.9%	63.4%	84.3%	85.3%	71.7%	75.3%	68.3%
■ Above Avg (5-6)	19.1%	15.4%	33.1%	14.5%	12.6%	25.8%	21.9%	29.4%
■ Below Avg (3-4)	6.3%	5.3%	2.5%	1.1%	1.7%	2.5%	2.7%	2.0%
■ Poor (1-2)	2.9%	3.4%	1.0%	0.1%	0.3%	0.0%	0.0%	0.3%
BASE	12244	7450	2209	1689	343	323	73	306
▲ MEAN	6.90	7.01	6.79	7.37	7.40	7.01	7.08	6.95

# OFFERING A VARIETY OF EXPERIENCES

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



	2016	2017	2018	2019	2020
U.S. West	87.4%	88.7%	87.0%	87.3%	71.6%
U.S. East	89.8%	90.4%	89.0%	89.9%	75.9%
Japan	53.9%	60.7%	59.7%	65.2%	63.4%
Canada	84.7%	86.3%	84.7%	85.7%	84.3%
Europe	85.7%	85.8%	84.3%	85.1%	85.3%
Oceania	77.8%	80.2%	78.1%	77.6%	71.7%
China	45.7%	74.1%	68.5%	68.1%	75.3%
Korea	65.6%	63.9%	62.5%	66.9%	68.3%



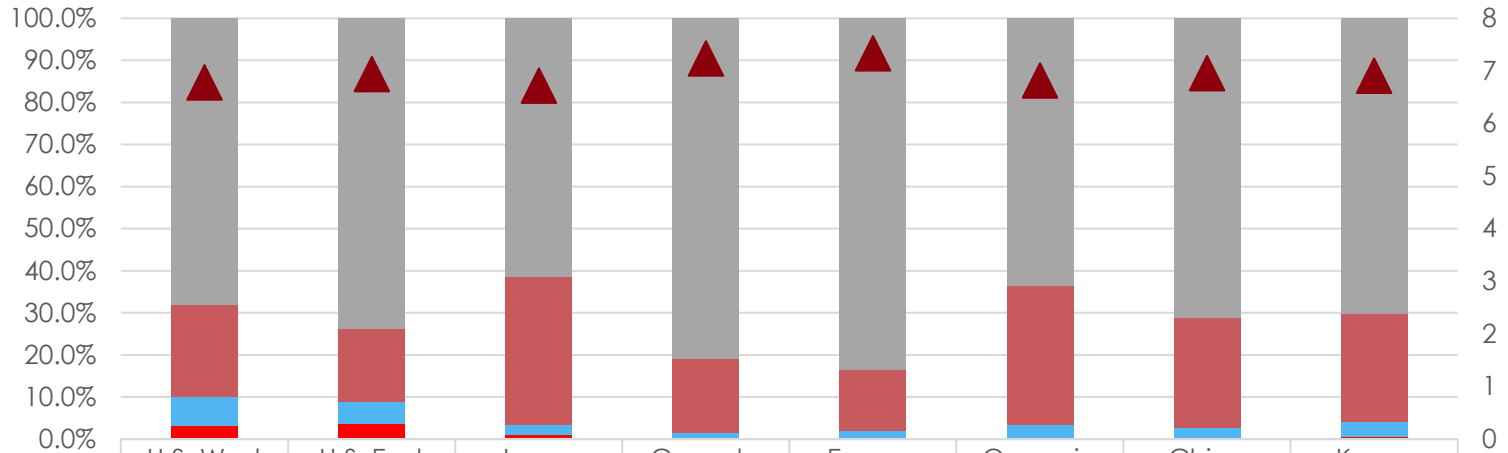
# OFFERING A VARIETY OF EXPERIENCES

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Travelers under the age of 35 were the most satisfied in this area among visitors in the following markets: U.S. West, U.S. East, Japan, Canada, China, and Korea.
- Visitors with a college degree from U.S. West and China were more satisfied with the variety of experiences than those with a college degree from these visitor markets.
- When the results were broken down by gender, we find females more satisfied than males among the following visitor markets: U.S. West, U.S. East, Canada, Europe, and Oceania.
- Visitors from U.S. West, U.S. East, and Korea whose trip included visits to multiple islands were more satisfied in this area than visitors from these markets whose trip consisted of visiting a single island.
- First-time visitors to Hawai'i from U.S. West, U.S. East, and Japan gave higher satisfaction scores in this area than repeat visitors.

# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

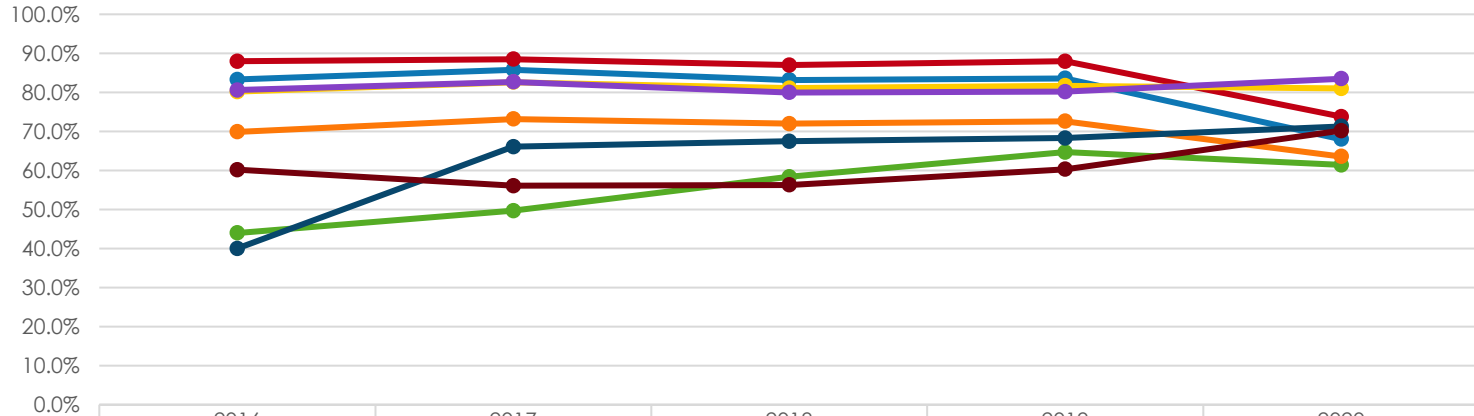
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	68.0%	73.8%	61.4%	81.0%	83.5%	63.6%	71.3%	70.2%
■ Above Avg (5-6)	21.9%	17.3%	35.2%	17.5%	14.5%	33.0%	26.0%	25.5%
■ Below Avg (3-4)	6.9%	5.2%	2.4%	1.3%	2.0%	3.2%	2.8%	3.6%
■ Poor (1-2)	3.2%	3.7%	1.0%	0.2%	0.0%	0.3%	0.0%	0.7%
BASE	12,244	7,450	2,209	1,689	343	323	73	306
▲ MEAN	6.78	6.94	6.72	7.24	7.33	6.82	6.96	6.91

# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

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



	2016	2017	2018	2019	2020
U.S. West	83.3%	85.8%	83.2%	83.6%	68.0%
U.S. East	88.0%	88.5%	87.0%	88.0%	73.8%
Japan	44.0%	49.7%	58.4%	64.7%	61.4%
Canada	80.2%	82.6%	81.1%	81.7%	81.0%
Europe	80.6%	82.7%	80.0%	80.2%	83.5%
Oceania	69.9%	73.2%	72.0%	72.6%	63.6%
China	40.0%	66.1%	67.5%	68.3%	71.3%
Korea	60.2%	56.1%	56.3%	60.3%	70.2%

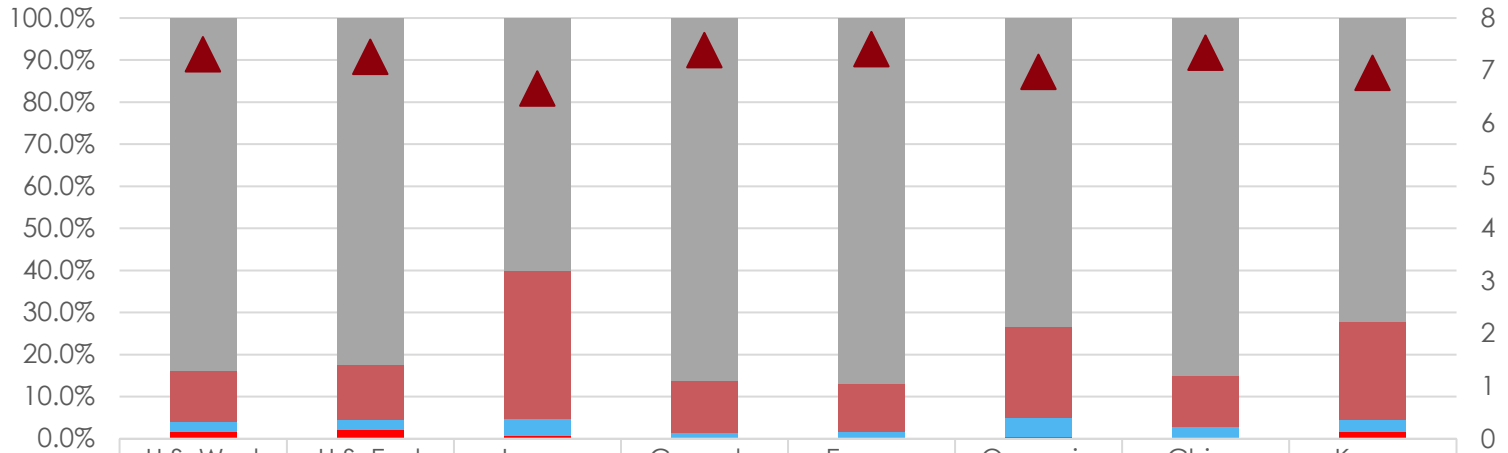
# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Younger travelers, under the age of 35 from the following visitor markets expressed higher level of satisfaction in this area: U.S. West, U.S. East, Japan, Canada, China, and Korea.
- Travelers with a college degree from U.S. West and China provided higher satisfaction scores on this question compared to visitors from these two markets without college degrees.
- Female visitors from U.S. East and Oceania gave higher mean scores compared to males from these two markets when asked about the availability of different/ unique experiences.
- Visitors from U.S. West, U.S. East, Oceania, and Korea whose trip included visits to multiple islands gave higher satisfaction scores in this area than visitors from these markets whose trip was to a single island.

# BEING A SAFE AND SECURE DESTINATION

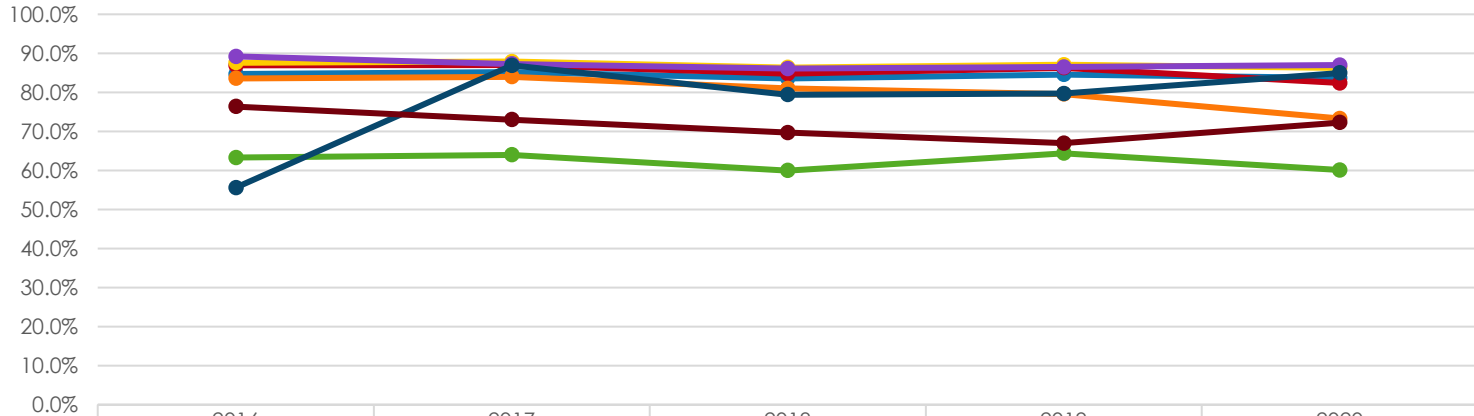
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	83.7%	82.4%	60.1%	86.3%	87.0%	73.3%	85.0%	72.3%
■ Above Avg (5-6)	12.3%	13.0%	35.1%	12.2%	11.3%	21.8%	12.3%	23.2%
■ Below Avg (3-4)	2.4%	2.6%	3.9%	1.5%	1.4%	4.3%	2.7%	2.9%
■ Poor (1-2)	1.6%	2.0%	0.8%	0.1%	0.3%	0.6%	0.0%	1.6%
BASE	12,244	7,450	2,209	1,689	343	323	73	306
▲ MEAN	7.31	7.26	6.66	7.39	7.41	6.98	7.34	6.96

# BEING A SAFE AND SECURE DESTINATION

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



	2016	2017	2018	2019	2020
U.S. West	84.7%	85.2%	83.6%	84.6%	83.7%
U.S. East	86.9%	87.0%	84.8%	86.3%	82.4%
Japan	63.3%	64.0%	60.0%	64.4%	60.1%
Canada	87.6%	87.9%	86.4%	87.1%	86.3%
Europe	89.2%	87.3%	86.1%	86.5%	87.0%
Oceania	83.6%	84.0%	81.0%	79.6%	73.3%
China	55.6%	86.9%	79.4%	79.7%	85.0%
Korea	76.4%	73.0%	69.7%	67.0%	72.3%

# BEING A SAFE AND SECURE DESTINATION

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from U.S. West and China with a college degree felt safer on their trip than did visitors from these markets without a college degree.
- Female visitors from U.S. West and U.S. East gave higher satisfaction scores to this safety question than males from these visitor markets.
- More affluent visitors from U.S. West felt safer on their trip compared to less affluent travelers from this visitor market.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – ACTIVITIES



## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.6%	93.0%	94.0%	95.7%	94.6%	91.0%	94.5%	97.4%
<b>On own (self guided)</b>	81.8%	81.3%	63.3%	84.0%	67.2%	54.9%	56.2%	77.7%
<b>Helicopter/ airplane</b>	2.8%	3.9%	1.1%	3.6%	8.3%	1.5%	27.4%	2.3%
<b>Boat/ submarine/ whale</b>	20.9%	26.0%	12.7%	27.8%	38.0%	19.3%	27.3%	20.3%
<b>Visit towns</b>	45.4%	47.9%	29.0%	58.0%	47.2%	31.0%	28.7%	36.4%
<b>Limo/ van/ bus tour</b>	3.0%	7.5%	21.2%	9.1%	18.6%	27.6%	20.5%	18.3%
<b>Scenic views/ natural landmark</b>	52.3%	60.7%	18.1%	63.4%	60.1%	47.3%	60.2%	61.0%
<b>Movie/ TV/ film location</b>	3.0%	5.1%	4.5%	3.7%	8.0%	9.5%	39.7%	21.9%

## ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	93.7%	92.9%	94.3%	98.2%	96.4%	94.3%	95.9%	99.0%
<b>Beach/ sunbathing</b>	82.6%	81.5%	69.3%	89.9%	77.1%	74.3%	78.0%	82.3%
<b>Bodyboard</b>	14.7%	8.7%	1.5%	12.4%	5.3%	3.9%	2.8%	2.0%
<b>Standup paddle board</b>	8.2%	6.6%	1.5%	3.8%	4.9%	6.1%	2.8%	6.2%
<b>Surfing</b>	10.3%	8.5%	2.9%	7.5%	7.6%	7.7%	5.5%	9.2%
<b>Canoeing/ kayak</b>	7.0%	7.3%	2.1%	5.9%	6.9%	2.2%	0.0%	3.3%
<b>Swim ocean</b>	66.5%	62.3%	29.8%	69.7%	62.8%	62.4%	27.4%	49.2%
<b>Snorkel</b>	47.9%	39.8%	14.3%	46.8%	36.2%	28.2%	21.9%	44.8%
<b>Freediving</b>	2.1%	1.8%	0.5%	1.0%	0.9%	0.0%	9.6%	1.3%
<b>Windsurf/ Kitesurf</b>	0.3%	0.4%	0.2%	0.3%	0.5%	0.4%	0.0%	0.3%
<b>Jet ski/ Parasail</b>	1.4%	1.5%	2.9%	0.5%	0.0%	1.7%	1.4%	4.9%
<b>Scuba</b>	4.0%	3.8%	1.9%	3.3%	3.1%	0.0%	1.4%	2.3%
<b>Fishing</b>	3.9%	3.6%	0.4%	2.2%	0.9%	2.3%	2.7%	1.3%
<b>Golf</b>	8.3%	7.4%	6.9%	9.1%	3.0%	1.9%	2.7%	7.3%

# ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	93.7%	92.9%	94.3%	98.2%	96.4%	94.3%	95.9%	99.0%
<b>Run/ Jog/ Fitness walk</b>	38.8%	35.5%	16.9%	37.1%	24.4%	26.0%	20.5%	11.8%
<b>Spa</b>	6.3%	6.9%	6.8%	4.8%	6.9%	5.7%	2.7%	3.6%
<b>Hiking</b>	45.5%	49.1%	18.4%	45.1%	38.0%	21.7%	38.4%	25.3%
<b>Backpack/Camping</b>	1.8%	2.6%	0.2%	3.0%	2.0%	1.0%	6.9%	0.7%
<b>Agritourism</b>	8.1%	10.8%	11.5%	11.6%	8.9%	9.6%	26.0%	26.6%
<b>Sport event/ tournament</b>	0.8%	1.0%	1.3%	2.9%	1.3%	2.0%	0.0%	1.6%
<b>Park/ botanical garden</b>	26.9%	34.6%	16.7%	39.7%	36.9%	27.1%	42.4%	26.6%
<b>Waterpark</b>	0.8%	1.1%	1.8%	1.1%	1.1%	0.9%	9.6%	3.6%
<b>Mountain tube/ waterfall rappel</b>	1.3%	1.3%	0.5%	1.4%	1.8%	0.9%	0.0%	1.6%
<b>Zip lining</b>	3.2%	3.0%	0.9%	1.8%	1.4%	2.4%	0.0%	1.6%
<b>Skydiving</b>	0.4%	0.4%	1.1%	0.3%	0.6%	0.0%	2.8%	1.6%
<b>All terrain vehicle (ATV)</b>	2.7%	4.0%	1.2%	2.0%	3.4%	3.8%	12.3%	9.8%
<b>Horseback riding</b>	1.8%	2.1%	3.0%	1.5%	0.6%	0.7%	5.5%	1.6%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	97.7%	96.9%	97.0%	98.9%	97.3%	98.4%	95.9%	98.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	16.4%	20.7%	16.3%	19.8%	31.9%	17.0%	54.9%	35.7%
<b>Live music/ stage show</b>	12.2%	17.2%	15.3%	30.0%	28.4%	20.1%	15.1%	14.4%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.7%	6.0%	5.6%	6.6%	10.1%	6.4%	1.4%	4.9%
<b>Fine dining</b>	44.0%	44.0%	35.4%	46.2%	43.8%	35.1%	42.5%	44.6%
<b>Family restaurant</b>	55.5%	52.7%	25.9%	64.2%	40.8%	69.6%	31.5%	47.9%
<b>Fast food</b>	37.4%	39.8%	56.2%	45.4%	40.8%	51.5%	49.3%	62.6%
<b>Food truck</b>	36.1%	37.3%	15.5%	32.4%	23.6%	24.0%	15.1%	60.0%
<b>Café/ coffee house</b>	41.6%	40.3%	49.9%	52.4%	50.5%	64.4%	30.1%	59.7%
<b>Ethnic dining</b>	23.2%	27.0%	6.0%	22.8%	18.5%	15.4%	30.1%	25.0%
<b>Prepared own meal</b>	64.6%	55.9%	14.5%	66.5%	39.0%	25.0%	24.7%	21.3%

# ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.9%	91.9%	97.6%	97.5%	94.7%	96.2%	95.9%	96.1%
<b>Mall/ department store</b>	34.8%	36.5%	81.5%	54.8%	52.0%	75.6%	68.5%	82.3%
<b>Designer boutique</b>	13.9%	15.3%	25.0%	19.2%	13.6%	22.0%	4.1%	5.9%
<b>Hotel/ resort store</b>	21.4%	25.5%	33.8%	28.0%	30.2%	30.3%	20.5%	24.9%
<b>Swap meet/ flea market</b>	10.2%	11.8%	3.1%	18.6%	6.8%	8.8%	1.4%	3.0%
<b>Discount/ outlet store</b>	13.1%	14.2%	25.3%	23.4%	16.5%	41.3%	34.2%	63.3%
<b>Supermarket</b>	71.8%	62.8%	69.1%	74.7%	68.6%	54.1%	69.8%	63.9%
<b>Farmer's market</b>	30.8%	26.9%	15.1%	43.2%	30.6%	16.7%	15.1%	12.2%
<b>Convenience store</b>	44.2%	45.4%	47.4%	54.1%	36.3%	66.6%	45.2%	61.0%
<b>Duty free store</b>	1.7%	2.8%	38.4%	4.8%	6.9%	7.0%	48.0%	41.6%
<b>Local shop/ artisan</b>	54.1%	56.7%	11.8%	65.3%	58.7%	46.6%	23.3%	19.7%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	45.0%	57.8%	53.1%	68.0%	75.4%	69.1%	78.0%	66.2%
<b>Historic military site</b>	12.2%	23.4%	14.7%	16.3%	33.9%	40.5%	52.0%	16.4%
<b>Other historical site</b>	19.9%	23.9%	14.3%	29.1%	30.4%	20.3%	28.8%	25.6%
<b>Museum/ art gallery</b>	9.6%	11.3%	6.1%	17.5%	18.6%	14.8%	21.9%	7.5%
<b>Luau/ Polynesian show/ hula show</b>	8.0%	16.1%	13.3%	28.4%	27.8%	26.2%	9.6%	29.8%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.7%	3.8%	7.0%	7.0%	5.4%	8.3%	5.5%	6.9%
<b>Play/ concert/ theatre</b>	1.2%	1.8%	3.1%	4.6%	5.3%	3.0%	2.7%	4.6%
<b>Art/ craft fair</b>	6.9%	7.0%	4.4%	14.0%	9.3%	5.4%	13.7%	4.6%
<b>Festival event</b>	4.9%	5.0%	2.2%	4.8%	4.5%	2.3%	2.7%	1.6%

# ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	84.9%	81.2%	96.8%	96.8%	95.1%	96.7%	84.9%	98.0%
<b>Airport shuttle</b>	9.1%	10.2%	28.0%	19.6%	23.2%	40.2%	11.0%	15.1%
<b>Trolley</b>	1.3%	1.7%	53.6%	6.6%	4.4%	21.9%	5.5%	27.2%
<b>Public bus</b>	2.4%	3.4%	16.0%	12.0%	14.8%	23.4%	16.5%	14.1%
<b>Tour bus/ tour van</b>	2.8%	7.8%	27.5%	11.6%	20.7%	35.2%	12.3%	30.5%
<b>Taxi/ limo</b>	5.2%	7.1%	27.8%	14.6%	24.0%	34.8%	20.5%	24.9%
<b>Rental car</b>	74.8%	66.1%	23.1%	79.8%	60.4%	38.8%	54.8%	61.3%
<b>Ride share</b>	13.1%	16.5%	5.3%	12.5%	17.8%	27.1%	15.1%	17.7%
<b>Bicycle rental</b>	2.6%	2.5%	4.0%	3.7%	2.6%	1.6%	1.4%	1.6%

## ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	37.5%	39.8%	13.5%	23.5%	18.7%	6.3%	15.1%	19.4%
Visit friends/ family	37.0%	39.2%	12.4%	22.6%	17.5%	6.3%	15.1%	19.4%
Volunteer non profit	1.0%	1.1%	1.3%	1.3%	1.7%	0.7%	0.0%	0.3%

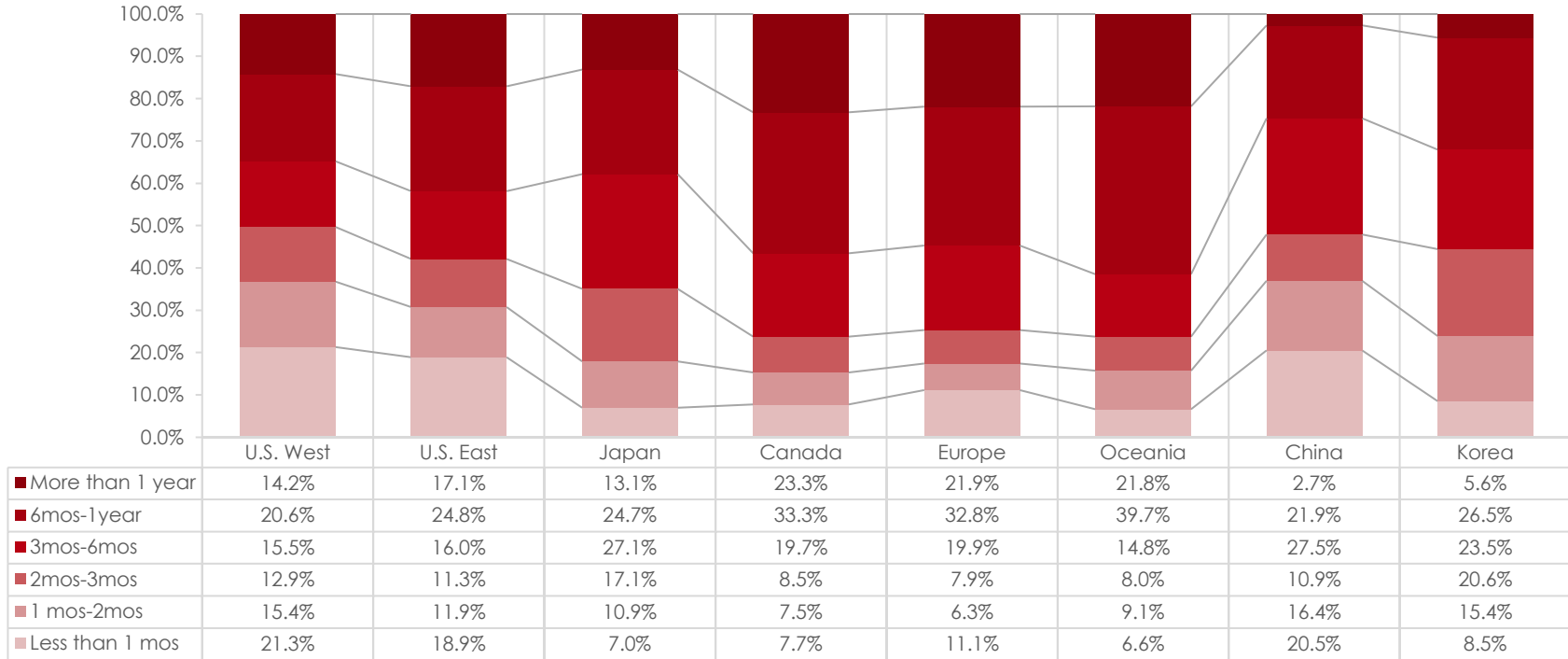


Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRAVEL PLANNING

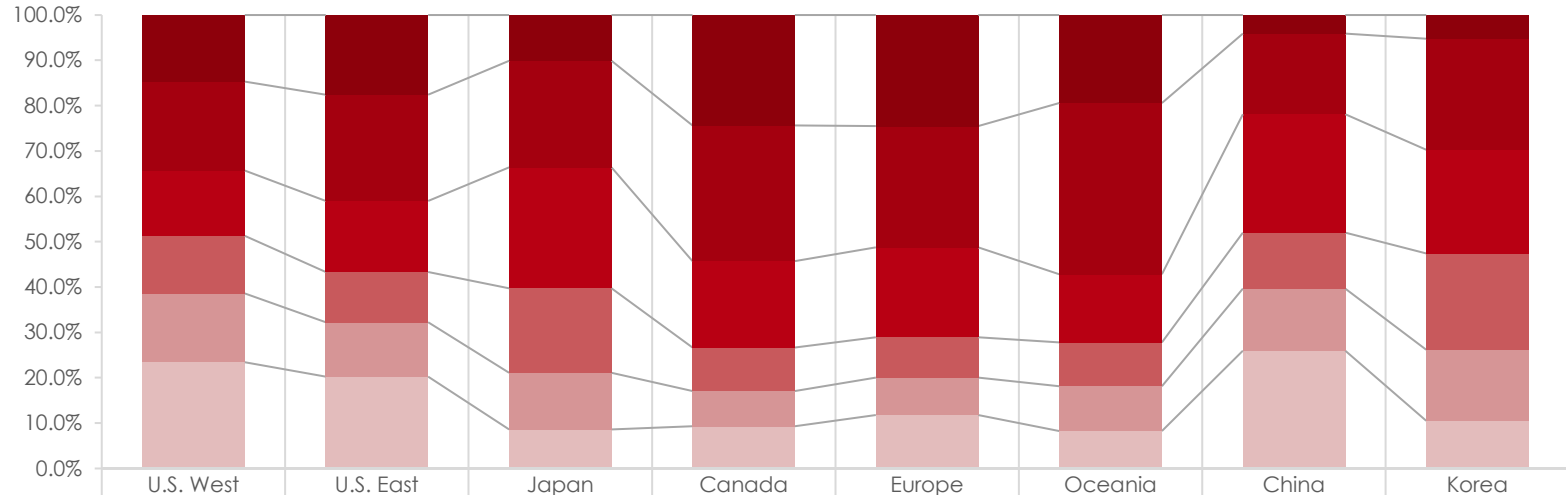
# TRAVEL PLANNING

## Decision to take vacation/ pleasure trip



# TRAVEL PLANNING

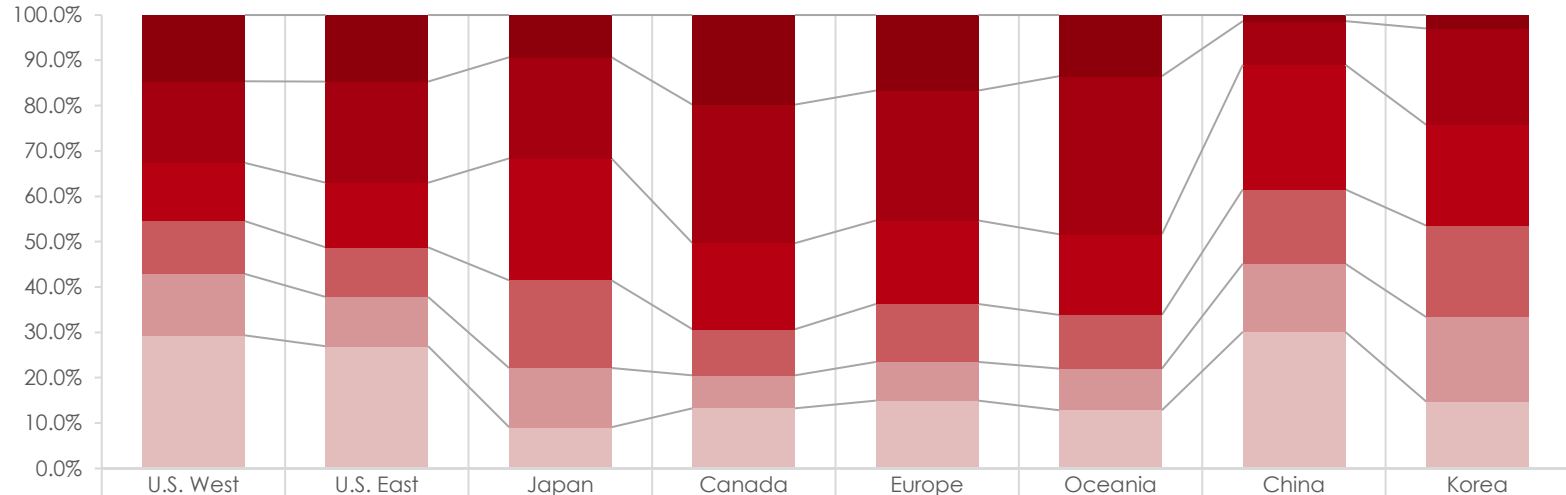
## Decision to visit Hawai'i



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	14.7%	17.6%	10.1%	24.3%	24.5%	19.4%	4.1%	5.3%
6mos-1year	19.6%	23.5%	23.5%	30.0%	26.8%	37.8%	17.8%	24.5%
3mos-6mos	14.4%	15.7%	26.7%	19.0%	19.8%	15.1%	26.1%	22.9%
2mos-3mos	12.7%	11.1%	18.6%	9.6%	8.9%	9.6%	12.3%	21.2%
1 mos-2mos	15.2%	12.0%	12.5%	7.7%	8.3%	9.9%	13.7%	15.7%
Less than 1 mos	23.4%	20.2%	8.6%	9.3%	11.8%	8.2%	26.0%	10.5%

# TRAVEL PLANNING

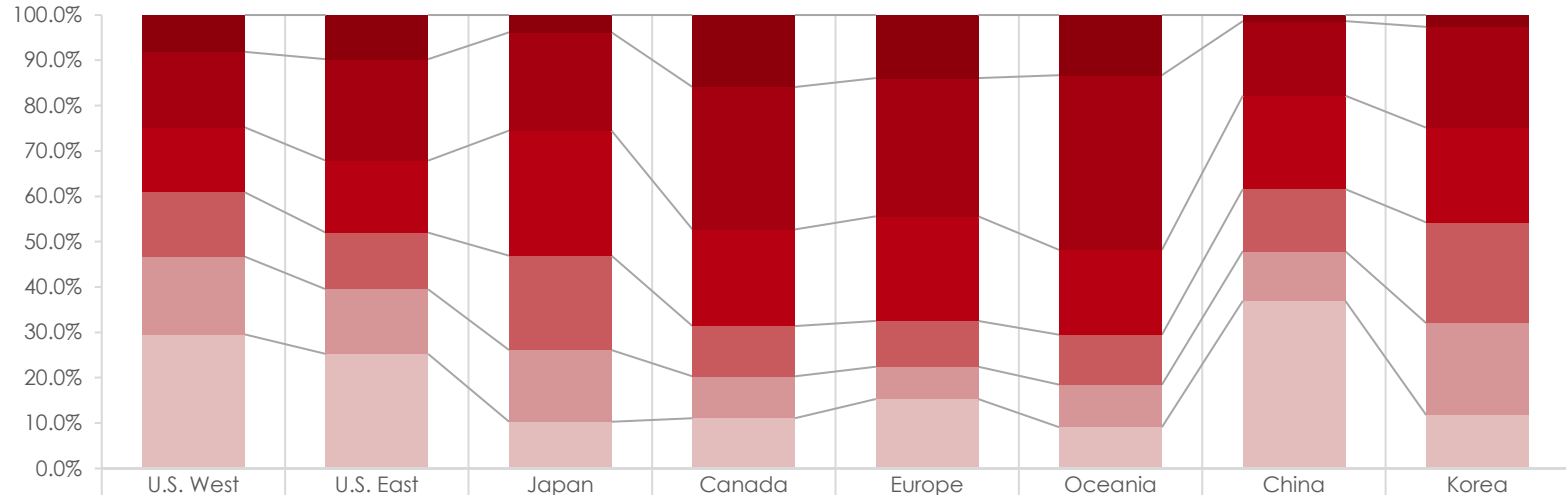
## Decision on which island to visit



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	14.6%	14.7%	9.3%	19.7%	16.7%	13.5%	1.4%	3.0%
6mos-1year	18.0%	22.3%	22.3%	30.6%	28.6%	34.8%	9.6%	21.2%
3mos-6mos	12.8%	14.3%	26.9%	19.0%	18.4%	17.8%	27.5%	22.2%
2mos-3mos	11.6%	10.9%	19.4%	10.1%	12.8%	11.9%	16.4%	20.2%
1 mos-2mos	13.5%	10.9%	13.1%	7.3%	8.6%	9.1%	15.0%	18.6%
Less than 1 mos	29.4%	26.9%	9.1%	13.3%	14.9%	12.9%	30.1%	14.7%

# TRAVEL PLANNING

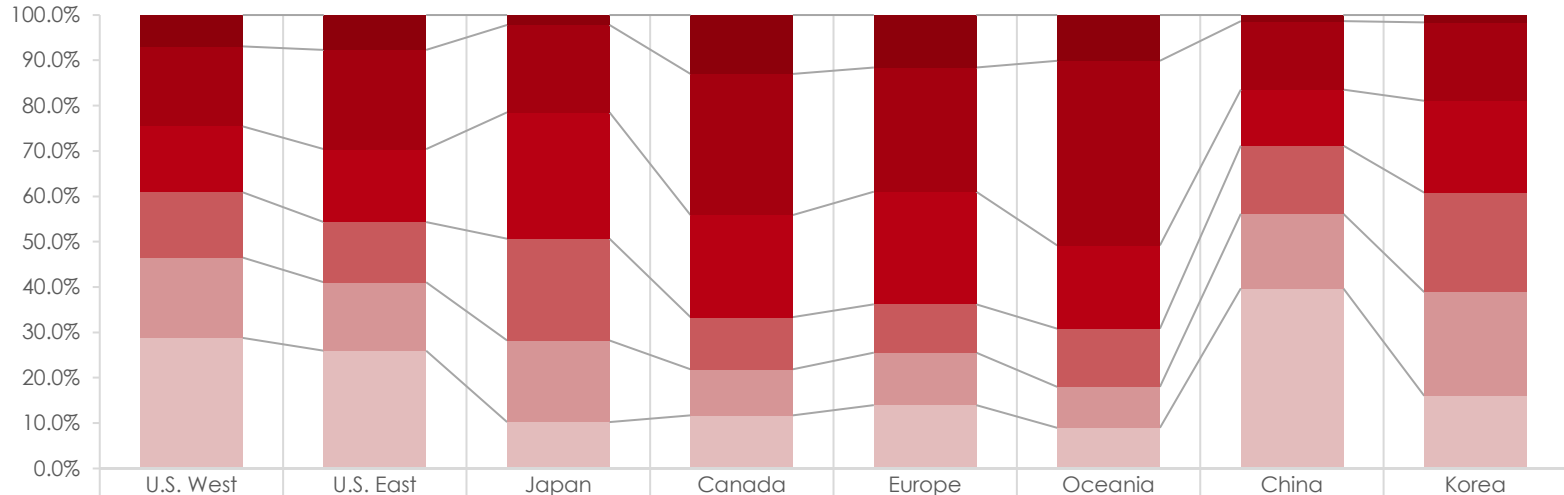
## Determining the dates of your trip



More than 1 year	8.1%	9.8%	3.9%	15.9%	14.0%	13.3%	1.4%	2.6%
6mos-1year	16.7%	22.4%	21.6%	31.4%	30.4%	38.5%	16.5%	22.2%
3mos-6mos	14.3%	15.9%	27.6%	21.3%	23.1%	18.7%	20.6%	20.9%
2mos-3mos	14.2%	12.5%	20.8%	11.0%	10.1%	11.0%	13.7%	22.2%
1 mos-2mos	17.2%	14.3%	15.8%	9.3%	7.1%	9.4%	11.0%	20.3%
Less than 1 mos	29.6%	25.2%	10.3%	11.0%	15.3%	9.1%	36.9%	11.8%

# TRAVEL PLANNING

## Begin booking your trip



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
More than 1 year	6.9%	7.7%	2.2%	13.0%	11.6%	10.1%	1.4%	1.6%
6mos-1year	17.6%	21.9%	19.3%	31.2%	27.4%	40.7%	15.1%	17.3%
3mos-6mos	14.5%	16.1%	27.8%	22.5%	24.8%	18.4%	12.4%	20.2%
2mos-3mos	14.4%	13.2%	22.4%	11.5%	10.7%	12.8%	15.1%	21.9%
1 mos-2mos	17.7%	15.1%	18.0%	10.1%	11.6%	9.1%	16.4%	22.9%
Less than 1 mos	28.8%	25.9%	10.2%	11.7%	14.0%	8.9%	39.7%	16.0%

# TRAVEL PLANNING SEGMENTATION

- Younger travelers under the age of 50 from U.S. West and U.S. East have shorter decision-making and planning windows with higher proportions deciding to travel to Hawai'i within a three-month window prior to arrival.
- Less affluent travelers from U.S. West and U.S. East had higher proportions who booked their trip less than a month prior to arrival.
- Visitors from U.S. West and U.S. East whose trip consisted of visiting just a single island had shorter booking windows. Conversely, those whose trip consisted of multi-island visits had a longer planning and decision-making process.
- Travelers using a travel agent from U.S. West and U.S. East had longer booking and travel planning windows compared to those who booked their trip without the aid of a travel agency.
- In terms of travel party size, those in smaller groups tended to have shorter planning and booking windows compared to larger travel parties.

# TRAVEL PLANNING – SOURCES OF INFORMATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Travel agents/ companies specializing in packaged tours	24.0%	29.9%	55.2%	14.0%	28.5%	52.5%	19.1%	37.5%
Personal experience	34.7%	30.1%	22.5%	41.6%	21.2%	31.3%	22.1%	13.6%
Recommendations from friends or relatives	29.5%	29.5%	19.9%	33.2%	31.5%	31.9%	22.0%	17.7%
Travel informational websites (i.e. TripAdvisor)	18.7%	24.0%	11.1%	30.2%	33.4%	32.2%	39.7%	11.9%
Online travel booking site (i.e. Expedia, Kayak or Orbitz)/ online travel agent	19.4%	19.5%	11.5%	30.5%	25.4%	25.8%	50.0%	17.8%
Guide books	10.2%	14.0%	24.2%	13.6%	22.9%	5.7%	19.1%	15.4%
Smart phone/ tablet apps	17.4%	16.6%	9.5%	15.1%	15.9%	16.2%	30.9%	24.7%
Travel blogs	10.0%	11.7%	18.2%	15.0%	18.6%	14.4%	26.4%	41.4%
Social media (i.e. Facebook, Twitter, Instagram)	9.2%	10.4%	21.0%	11.7%	14.4%	14.5%	22.1%	24.3%
Information direct from airline/ commercial carriers	15.1%	13.7%	8.8%	12.4%	16.0%	10.3%	1.5%	5.6%
Information direct from hotels/ resorts (front desk/ concierge/ tour desk)	13.5%	14.4%	7.2%	12.4%	12.7%	13.7%	4.4%	3.0%
Hawaii's destination website (GoHawaii.com)	8.4%	13.3%	5.3%	16.7%	21.4%	17.2%	14.8%	3.9%
None of these	6.9%	7.2%	1.9%	5.6%	4.6%	2.2%	1.5%	3.6%
Magazines/ newspaper articles	2.1%	3.8%	6.9%	2.7%	4.9%	3.5%	4.4%	1.6%
Television shopping channel/ television program	0.4%	0.9%	4.2%	0.3%	0.9%	0.4%	1.5%	1.0%



# TRAVEL PLANNING – SOURCES OF INFORMATION

- When segmented by age we find younger travelers under the age of 35 from U.S. West and U.S. East more reliant on the following: recommendations from friends and family, travel blogs, and social media.
- Younger travelers from Japan, particularly those under 35 were more reliant on travel agents and companies specializing in packaged tours, social media, and recommendations.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRIP PURPOSE

# PRIMARY PURPOSE OF TRIP – Top Responses

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pleasure/Vacation	64.6%	54.1%	68.8%	84.6%	68.8%	82.6%	79.5%	61.2%
Visiting Friends or Relatives	19.8%	26.0%	2.1%	4.3%	7.4%	2.1%	4.1%	2.3%
Honeymoon	1.4%	2.9%	14.0%	1.7%	4.7%	1.6%	6.8%	27.0%
Other Business	4.3%	4.3%	1.5%	0.7%	1.1%	0.8%	1.4%	0.0%
Anniversary/ birthday	1.6%	2.2%	0.4%	1.6%	1.9%	5.0%	0.0%	0.7%
Government or Military Business	1.0%	2.6%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%
To Get Married	0.6%	1.1%	2.8%	0.5%	0.0%	0.3%	0.0%	1.3%
Convention/Conference	0.5%	1.3%	0.5%	1.8%	5.8%	0.6%	2.7%	2.0%
Incentive Trip	0.3%	0.5%	3.7%	0.6%	5.7%	0.6%	2.8%	0.3%
Attend/ participate in a wedding/ vow renewal	0.4%	0.5%	1.3%	0.7%	1.3%	0.6%	0.0%	0.0%
Have a vacation home/ timeshare	0.8%	0.2%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%

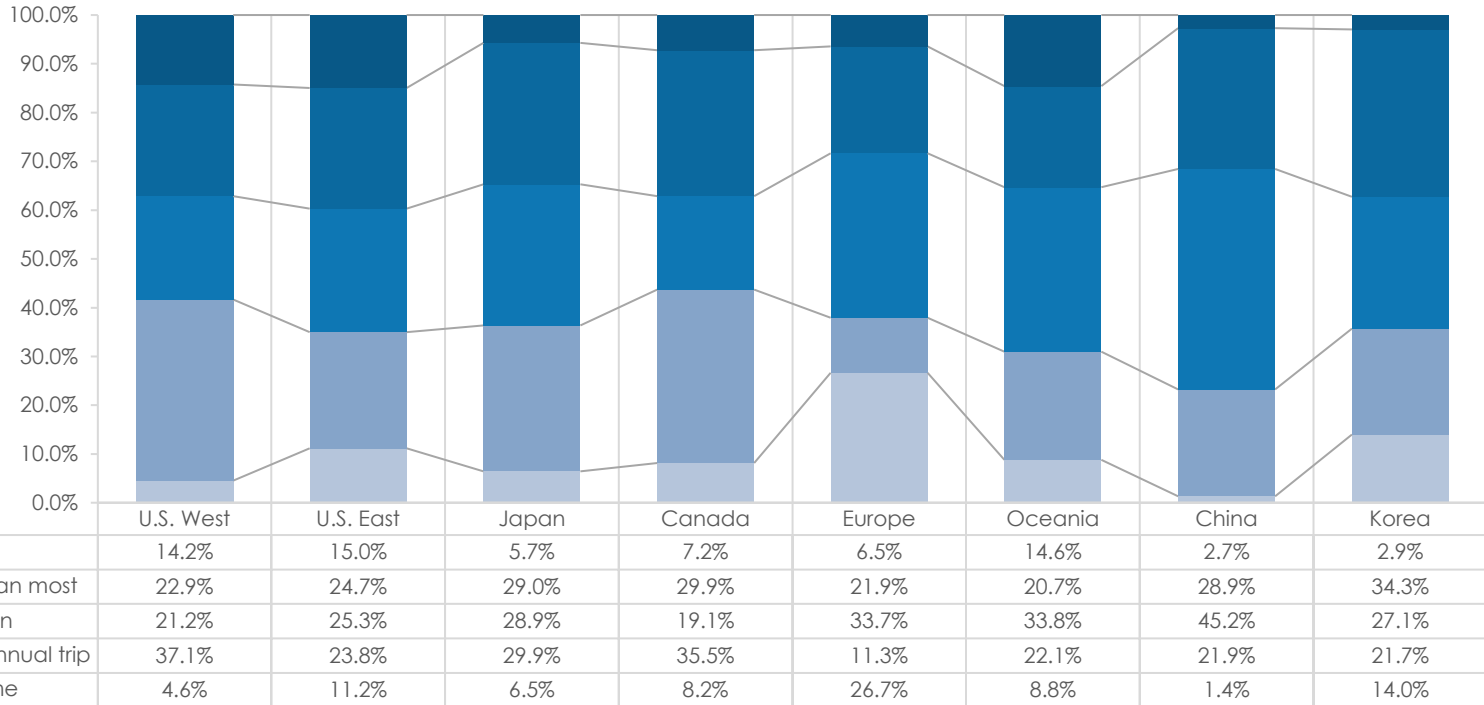
# SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pleasure/Vacation	81.5%	76.7%	82.3%	94.8%	86.1%	91.6%	85.0%	82.7%
Visiting Friends or Relatives	28.8%	33.6%	5.7%	11.7%	14.2%	6.0%	8.2%	5.9%
Other Business	7.1%	6.2%	2.1%	1.2%	2.2%	2.0%	9.6%	0.3%
Honeymoon	2.1%	3.9%	16.1%	2.0%	6.8%	2.0%	8.2%	28.0%
Anniversary/ birthday	3.5%	3.7%	0.6%	3.2%	4.1%	7.1%	0.0%	1.3%
Incentive Trip	1.0%	1.4%	7.6%	1.8%	8.0%	1.2%	11.0%	2.3%
Government or Military Business	1.2%	3.0%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%
To Get Married	0.8%	1.3%	4.6%	0.9%	0.6%	0.3%	0.0%	3.3%
Convention/Conference	0.8%	1.7%	1.2%	2.8%	7.2%	1.5%	2.7%	2.0%
Corporate meetings	0.5%	0.8%	2.2%	0.9%	2.3%	0.3%	2.7%	0.3%
Sporting events	0.4%	0.6%	1.8%	1.3%	1.6%	1.5%	0.0%	1.0%
Layover/ break up flight	0.1%	0.2%	0.2%	0.6%	0.6%	7.9%	1.4%	0.3%

# PURPOSE OF TRIP - SEGMENTATION

- Travelers from U.S. West between the ages of 35-49 were more likely to be here on vacation than other age groups.
- Visitors from U.S. West and U.S. East under the age of 35 were more likely to be traveling to Hawai'i visiting friends and family, because of a honeymoon, or to get married.
- Older segments from U.S. East were more likely to be traveling celebrating a birthday/ anniversary.
- Older segments for both U.S. West and U.S. East were also more likely to be traveling evaluating real estate purchase options.
- More affluent travelers from both U.S. West and U.S. East were more likely to be on vacation while less affluent travelers from these markets were more likely to be visiting friends and family.
- Female travelers from Japan were more likely to be on vacation compared to males.
- Females from the following markets were more likely to be here visiting friends and family: U.S. West, U.S. East, and Canada.

# VACATION TRIP DESCRIPTION



# VACATION TRIP DESCRIPTION – SEGMENTATION

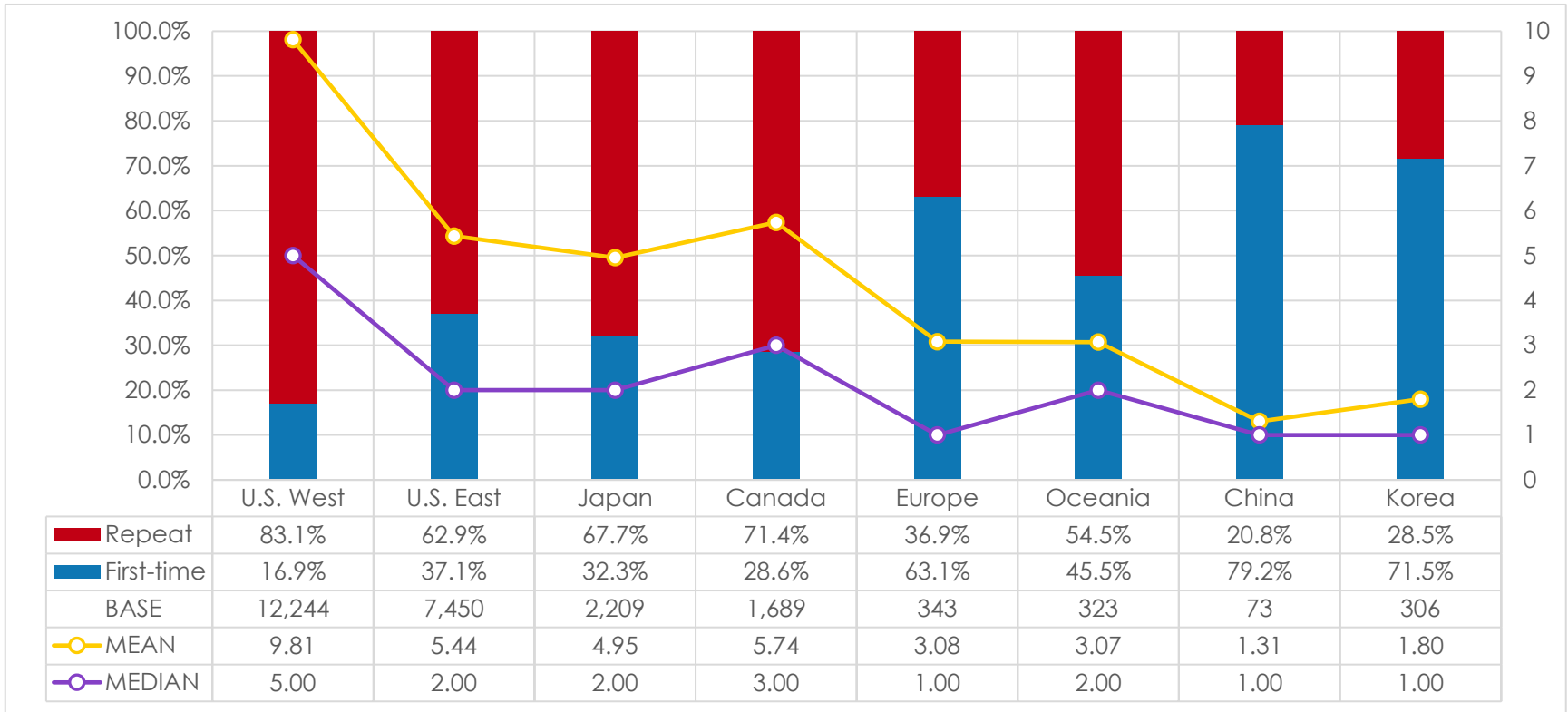
- More educated and affluent travelers from U.S. West and U.S. East were more likely to describe their trip as a regular occurrence while less educated and less affluent travelers from these markets were more likely to describe the trip as something special, a rarer occurrence.
- Male respondents from U.S. West, U.S. East, and Canada were more likely to describe this trip as a regular occurrence. Females from these markets were more likely to identify the trip as once in a lifetime.
- Visitors from U.S. West and U.S. East whose trip consisted of visiting a single island were more likely to say this trip was something of a regular occurrence. Conversely, those visiting multiple islands were more likely to say this trip was more special than most.
- Older travelers from the U.S. East, U.S. West, Japan, and Canada were more likely to describe their trip as an annual or semi-annual occurrence. Conversely, younger travelers were more likely to describe the trip as a more special, rare occurrence.

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRIPS TO HAWAII



# 1<sup>ST</sup> TIME VS REPEAT VISITOR



# 1<sup>ST</sup> TIME VS REPEAT VISITOR

- More affluent visitors from the U.S. West and U.S. East have traveled to Hawai'i more frequently.
- Males traveled more frequently to Hawai'i among the following visitor markets compared to females: U.S. West, U.S. East, China, and Canada.
- Travelers from Japan who visited multiple islands during their trip have traveled to Hawai'i more frequently in the past compared to those from Japan who visited just a single island.
- Those in smaller travel parties from the following visitor markets have traveled to Hawai'i on a more frequent basis: U.S. West, U.S. East, Japan, and Canada.

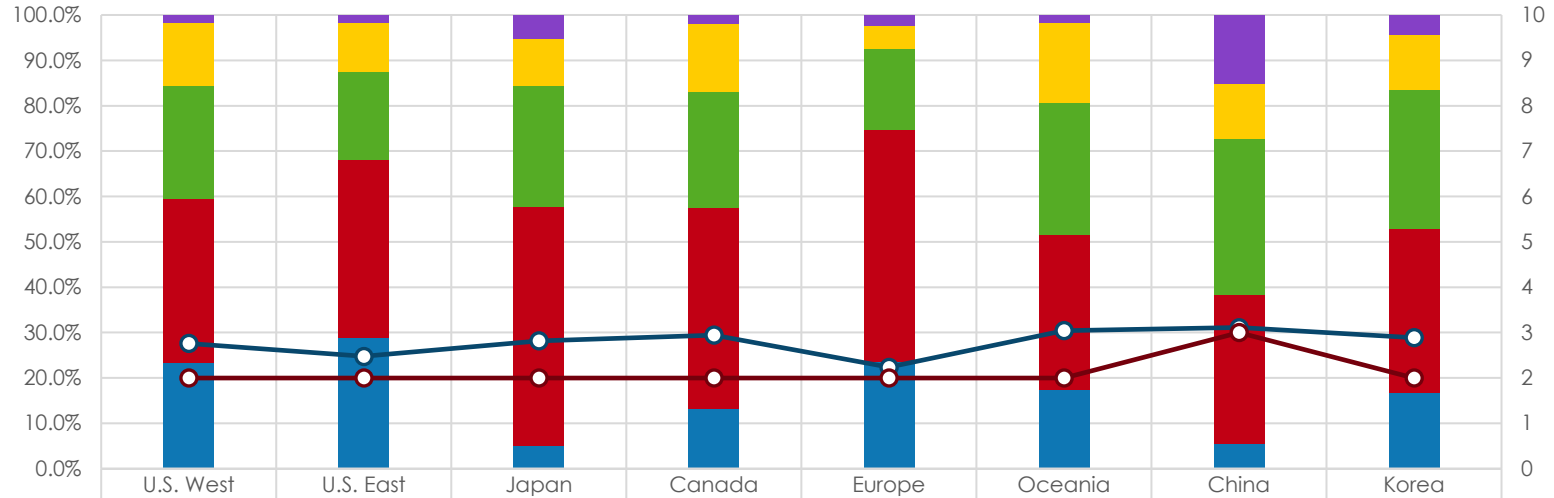
Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRAVEL PARTY

# TRAVEL PARTY MEMBERS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>My spouse</b>	51.5%	48.1%	46.5%	66.4%	48.6%	56.2%	57.5%	56.2%
<b>Other adult members of my family</b>	22.1%	20.3%	24.5%	27.3%	17.1%	30.0%	31.5%	34.3%
<b>My child(ren)/ grandchild(ren) under 18</b>	22.8%	14.9%	10.3%	17.7%	6.8%	27.7%	27.3%	18.7%
<b>My friends/ associates</b>	15.5%	13.9%	29.8%	17.9%	18.9%	11.8%	20.5%	9.8%
<b>Myself only (traveled alone/ no one else)</b>	17.2%	22.2%	4.9%	6.4%	14.2%	9.9%	5.5%	4.6%
<b>My girlfriend/ boyfriend</b>	8.9%	7.6%	3.9%	6.9%	10.5%	5.6%	6.9%	0.3%
<b>Same sex partner</b>	1.1%	1.0%	0.2%	0.9%	2.0%	0.9%	0.0%	0.0%

# TRAVEL PARTY SIZE

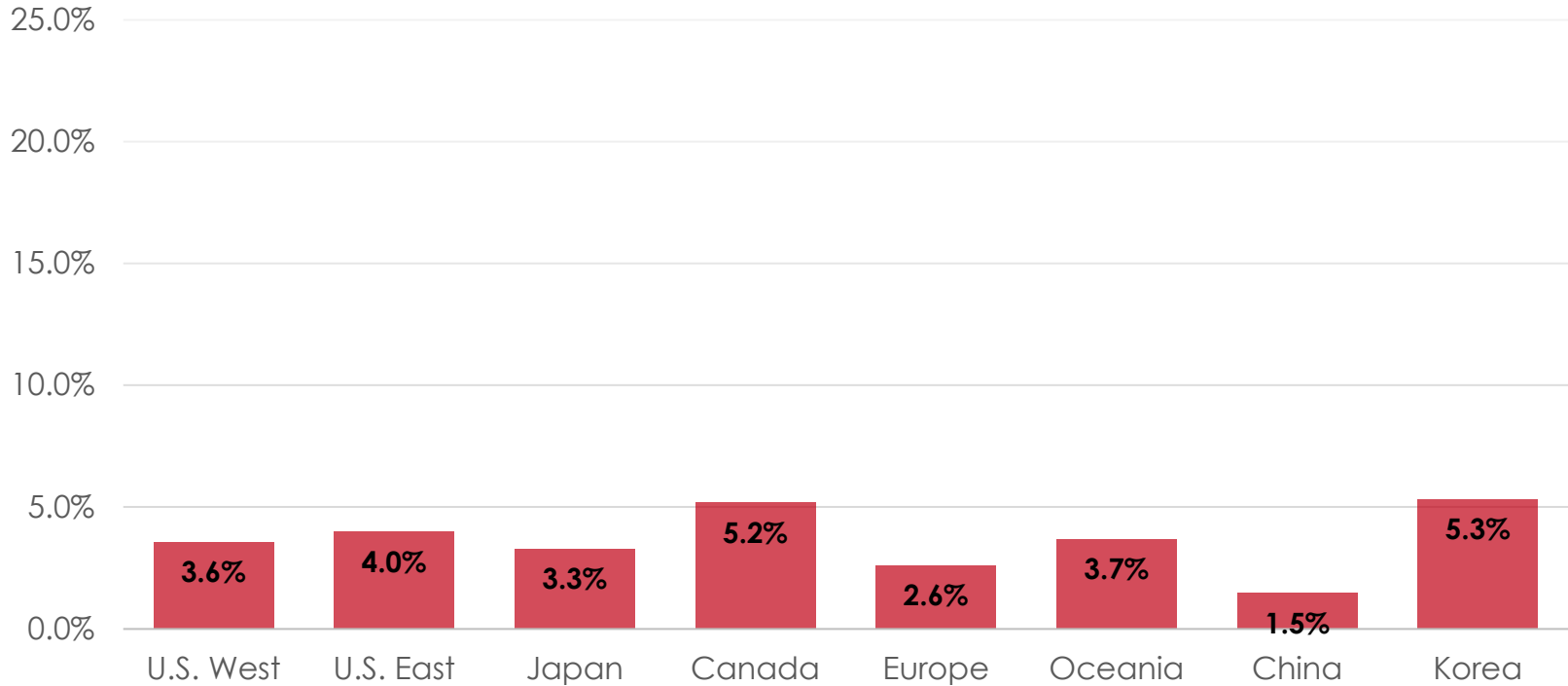


11+	1.6%	1.8%	5.1%	1.9%	2.4%	1.8%	15.0%	4.3%
5-10 persons	14.0%	10.8%	10.6%	14.9%	4.9%	17.6%	12.3%	12.1%
3-4 Persons	24.9%	19.4%	26.5%	25.7%	17.9%	29.2%	34.3%	30.7%
Two Persons	36.2%	39.0%	52.8%	44.2%	51.1%	34.1%	32.9%	36.3%
Alone	23.4%	29.0%	5.0%	13.3%	23.6%	17.4%	5.5%	16.7%
BASE	12,244	7,450	2,203	1,689	343	323	73	306
MEAN	2.76	2.48	2.82	2.95	2.24	3.04	3.11	2.89
MEDIAN	2.00	2.00	2.00	2.00	2.00	2.00	3.00	2.00

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – TRAVELERS WITH DISABILITIES

# DISABLED TRAVELER – REQUIRED ASSISTANCE



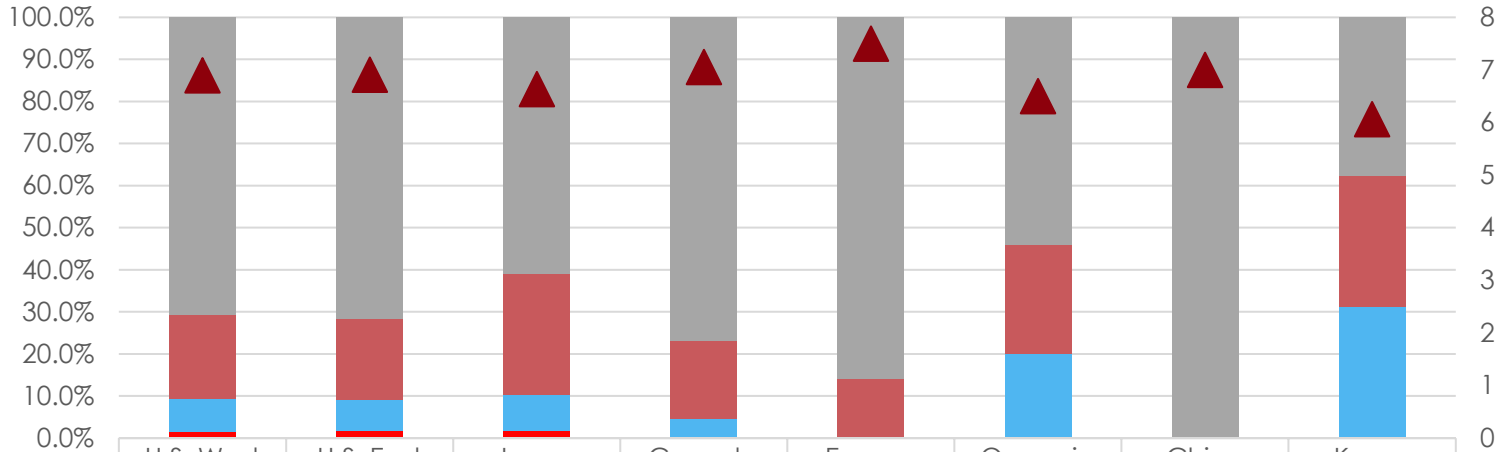
# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Mobility aid (wheelchair, scooter, crutches, cane)	74.1%	76.0%	14.7%	73.2%	90.1%	77.9%	0.0%	31.2%
Personal assistance	23.6%	16.7%	4.4%	19.7%	19.9%	31.1%	100.0%	12.5%
No one in our travel party required assistance	4.1%	7.3%	48.3%	8.4%	0.0%	11.1%	0.0%	31.3%
Orientation and mobility assistance	2.7%	2.4%	15.7%	6.0%	12.6%	0.0%	0.0%	0.0%
Other disability related aid	3.2%	4.9%	1.6%	0.0%	0.0%	0.0%	0.0%	6.3%
Lift equipped van	0.7%	0.3%	10.3%	1.3%	0.0%	8.9%	0.0%	6.3%
ASL Interpreter/ texting/ captioning	2.0%	0.3%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	0.7%	0.7%	4.4%	0.0%	0.0%	0.0%	0.0%	6.2%
Print material in alternate format	0.7%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	12.4%
<b>BASE</b>	431	288	73	81	9	10	1	16



# OVERALL ACCESSIBILITY – AIRPORTS

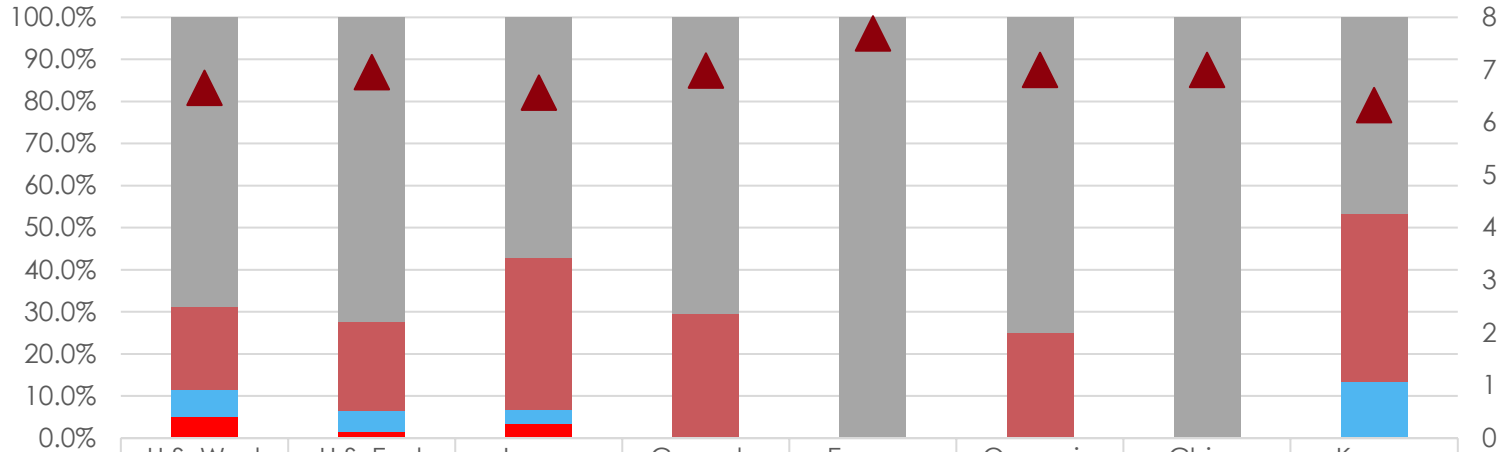
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	70.7%	71.7%	60.9%	76.9%	86.0%	54.0%	100.0%	37.6%
■ Above Avg (5-6)	19.9%	19.1%	28.8%	18.4%	14.0%	26.0%	0.0%	31.3%
■ Below Avg (3-4)	8.0%	7.4%	8.7%	4.7%	0.0%	19.9%	0.0%	31.2%
■ Poor (1-2)	1.4%	1.8%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	425	283	73	81	8	11	1	16
▲ MEAN	6.90	6.91	6.64	7.06	7.50	6.50	7.00	6.07

# OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

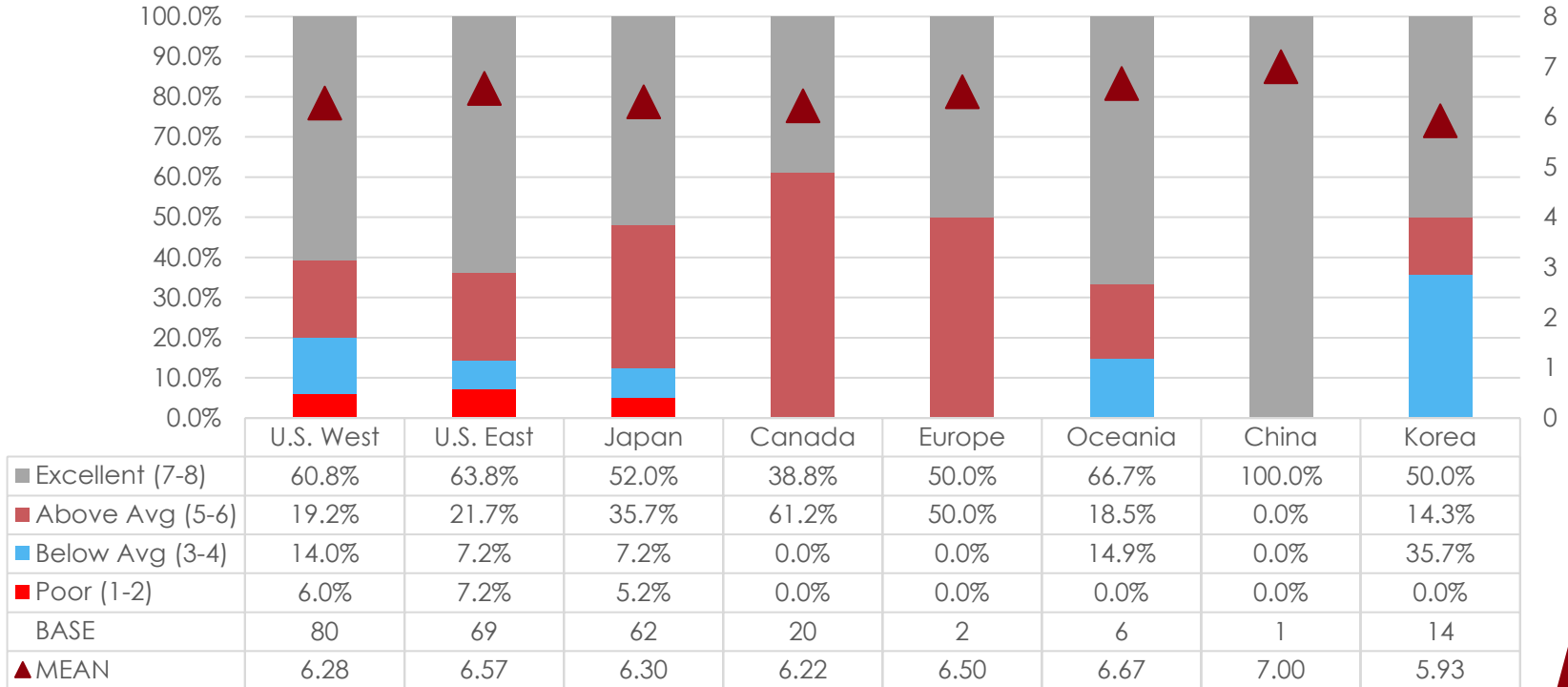
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	68.8%	72.4%	57.1%	70.5%	100.0%	75.0%	100.0%	46.7%
■ Above Avg (5-6)	19.7%	21.1%	36.0%	29.5%	0.0%	25.0%	0.0%	39.8%
■ Below Avg (3-4)	6.3%	4.9%	3.4%	0.0%	0.0%	0.0%	0.0%	13.5%
■ Poor (1-2)	5.2%	1.6%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	147	123	70	38	3	8	1	15
▲ MEAN	6.66	6.96	6.57	6.99	7.69	7.00	7.00	6.33

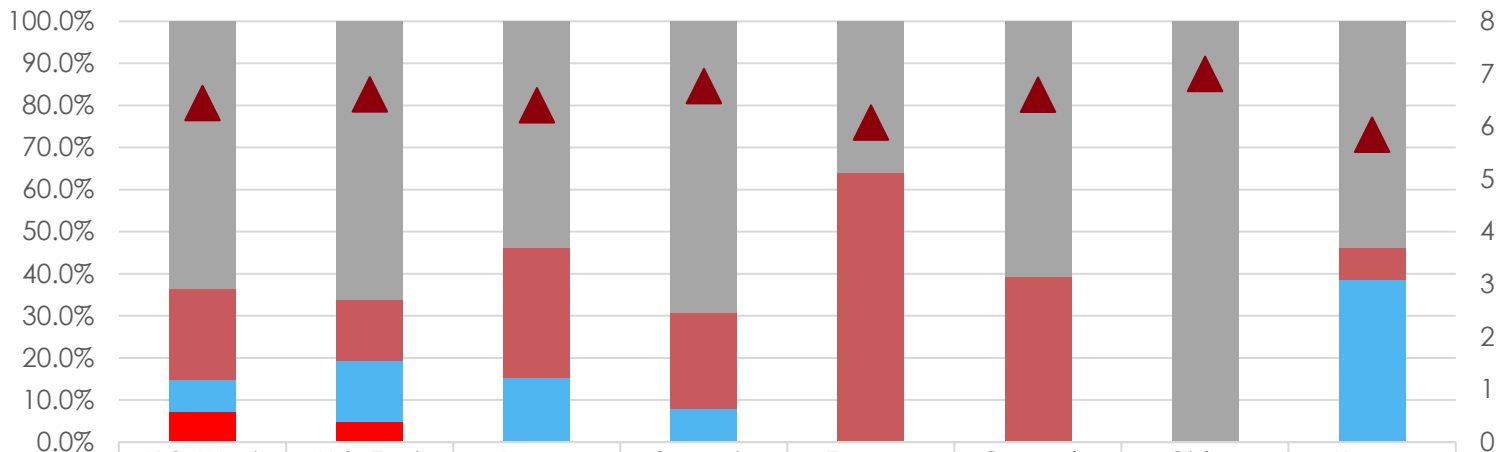
# OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

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



# OVERALL ACCESSIBILITY – RIDE SHARE

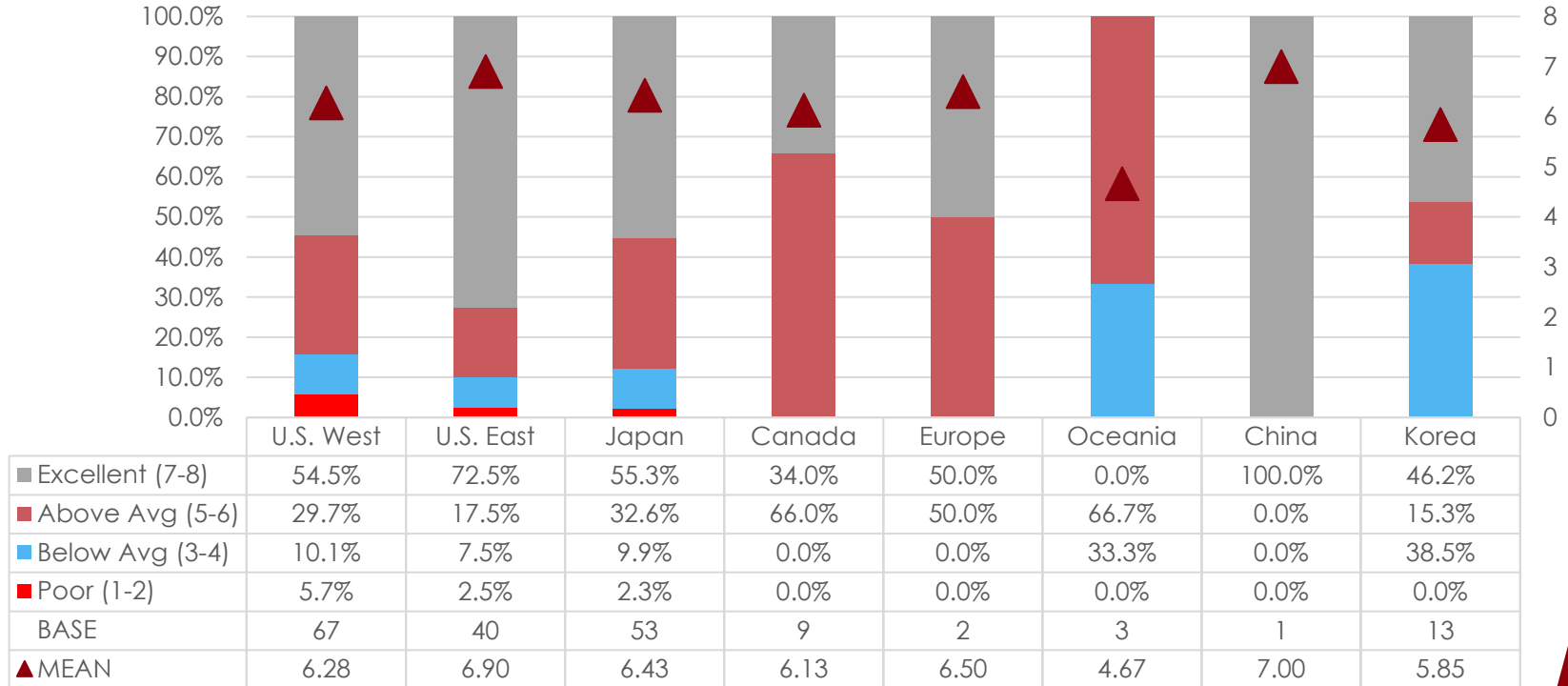
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	63.6%	66.2%	53.8%	69.3%	35.9%	60.8%	100.0%	53.9%
■ Above Avg (5-6)	21.6%	14.5%	30.8%	22.7%	64.1%	39.2%	0.0%	7.6%
■ Below Avg (3-4)	7.6%	14.5%	15.4%	8.0%	0.0%	0.0%	0.0%	38.5%
■ Poor (1-2)	7.2%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	80	62	52	13	3	5	1	13
▲ MEAN	6.45	6.61	6.41	6.77	6.08	6.61	7.00	5.85

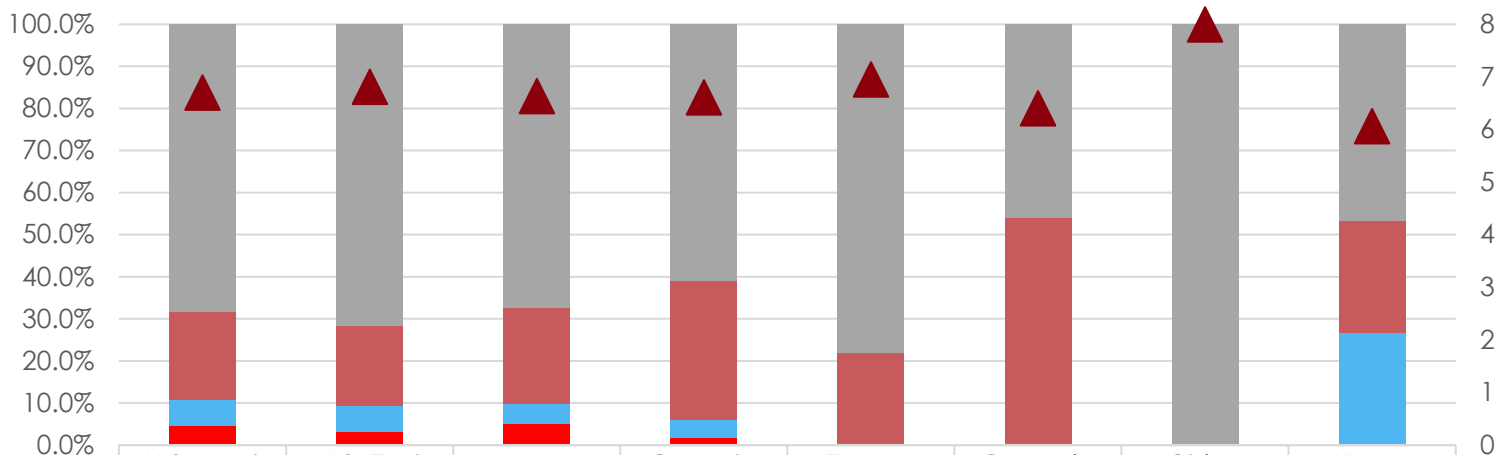
# OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

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



# OVERALL ACCESSIBILITY – HOTELS

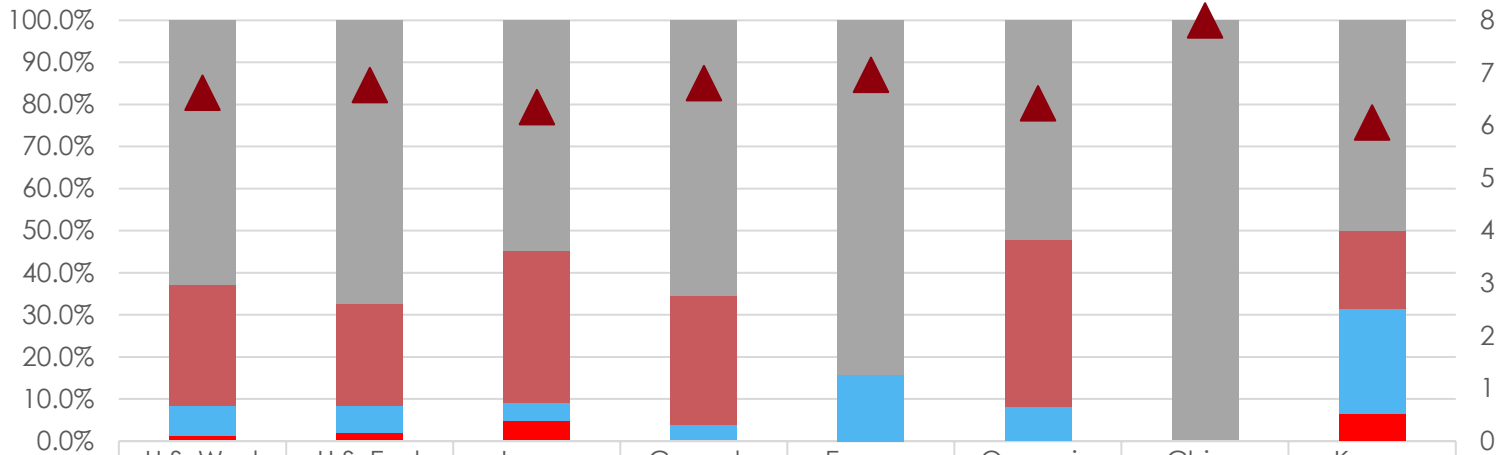
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	68.3%	71.7%	67.4%	61.0%	78.1%	46.1%	100.0%	46.7%
■ Above Avg (5-6)	20.9%	18.9%	22.8%	32.8%	21.9%	53.9%	0.0%	26.6%
■ Below Avg (3-4)	6.0%	6.3%	4.6%	4.3%	0.0%	0.0%	0.0%	26.7%
■ Poor (1-2)	4.7%	3.1%	5.2%	1.8%	0.0%	0.0%	0.0%	0.0%
BASE	239	159	70	48	5	8	1	15
▲ MEAN	6.70	6.81	6.64	6.61	6.95	6.41	8.00	6.07

# OVERALL ACCESSIBILITY – RESTAURANTS

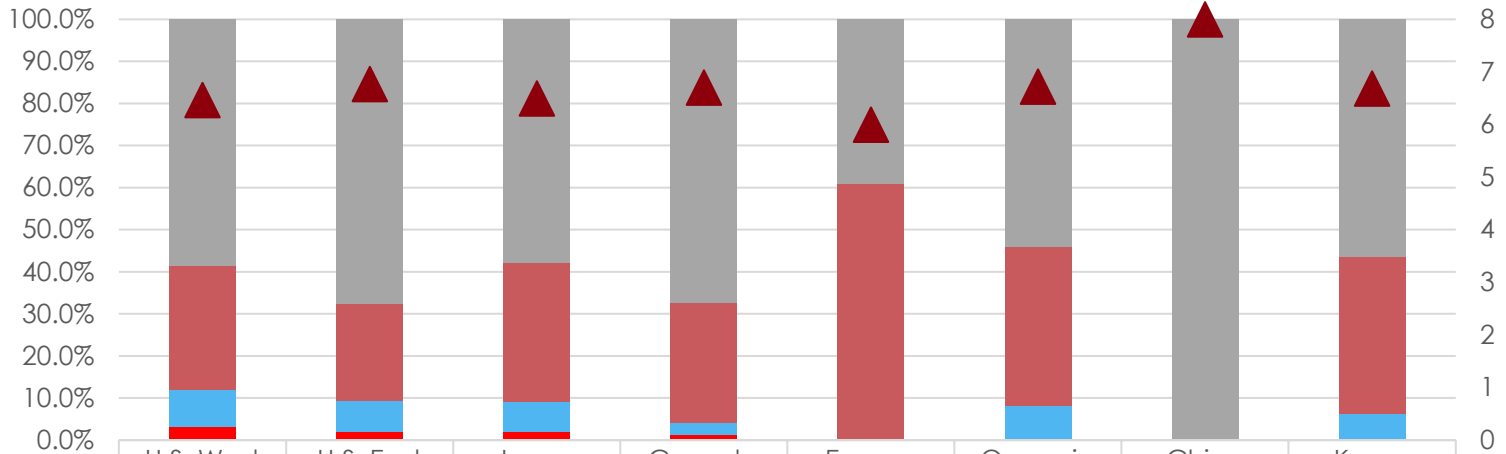
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	63.0%	67.4%	54.9%	65.5%	84.3%	52.1%	100.0%	50.0%
■ Above Avg (5-6)	28.8%	24.4%	35.9%	30.6%	0.0%	39.9%	0.0%	18.6%
■ Below Avg (3-4)	7.0%	6.2%	4.4%	3.9%	15.7%	8.0%	0.0%	25.1%
■ Poor (1-2)	1.3%	2.1%	4.9%	0.0%	0.0%	0.0%	0.0%	6.3%
BASE	370	242	73	75	7	11	1	16
▲ MEAN	6.62	6.77	6.35	6.81	6.97	6.42	8.00	6.06

# OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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

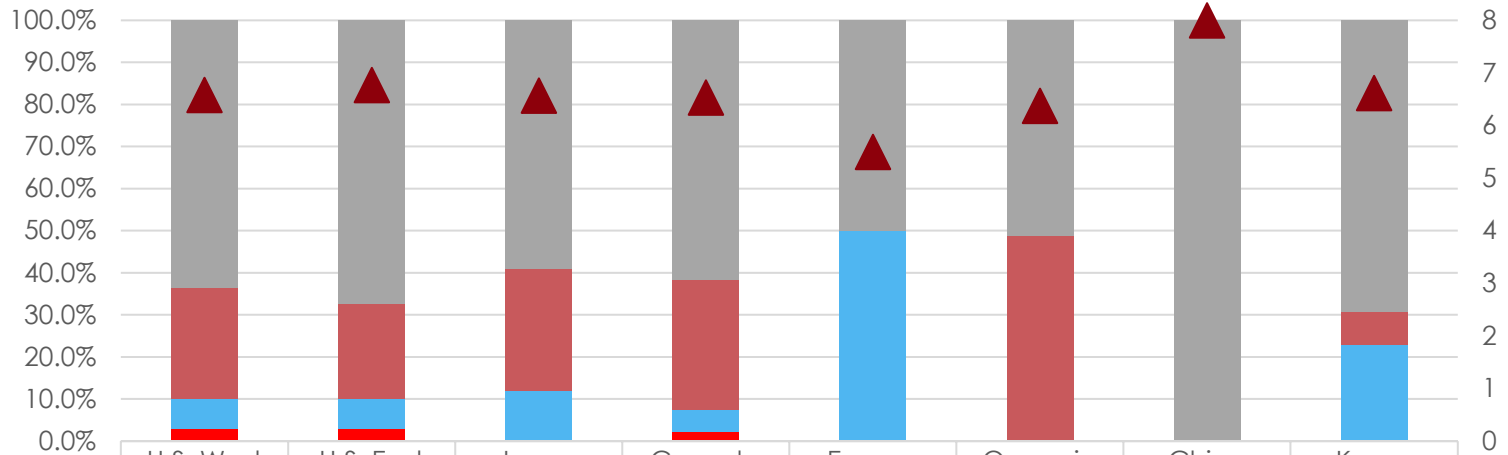


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	58.6%	67.6%	57.8%	67.4%	39.1%	54.0%	100.0%	56.3%
■ Above Avg (5-6)	29.3%	23.0%	33.1%	28.4%	60.9%	37.9%	0.0%	37.4%
■ Below Avg (3-4)	9.0%	7.5%	7.2%	3.0%	0.0%	8.0%	0.0%	6.3%
■ Poor (1-2)	3.1%	1.9%	2.0%	1.2%	0.0%	0.0%	0.0%	0.0%
BASE	268	213	61	70	5	11	1	16
▲ MEAN	6.47	6.77	6.50	6.71	6.00	6.72	8.00	6.69



# OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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

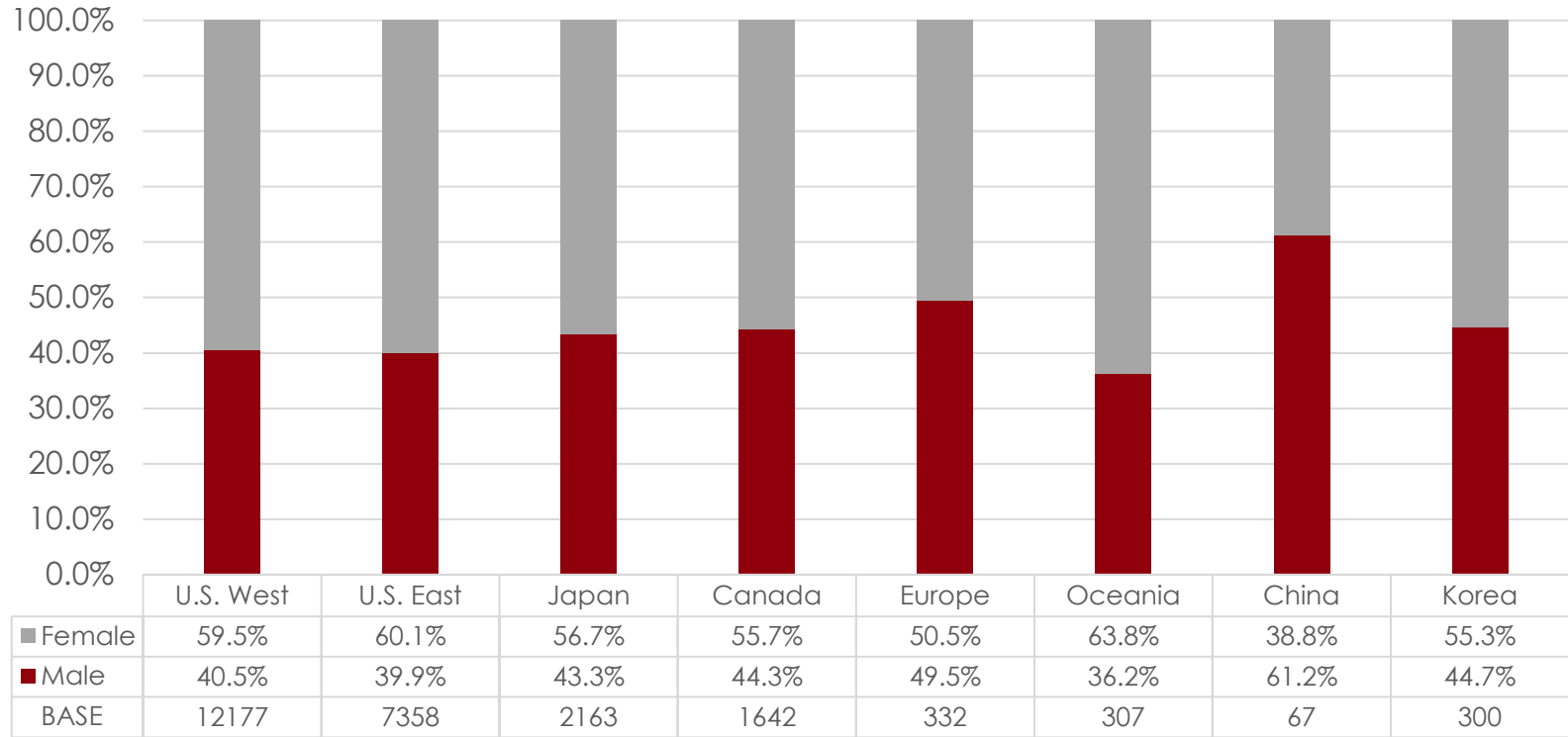


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	63.7%	67.4%	59.0%	61.7%	50.0%	51.3%	100.0%	69.3%
■ Above Avg (5-6)	26.2%	22.5%	29.2%	30.9%	0.0%	48.7%	0.0%	7.6%
■ Below Avg (3-4)	7.3%	7.2%	11.8%	5.3%	50.0%	0.0%	0.0%	23.1%
■ Poor (1-2)	2.9%	2.9%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
BASE	167	138	58	40	2	8	1	13
▲ MEAN	6.58	6.77	6.57	6.53	5.50	6.38	8.00	6.62

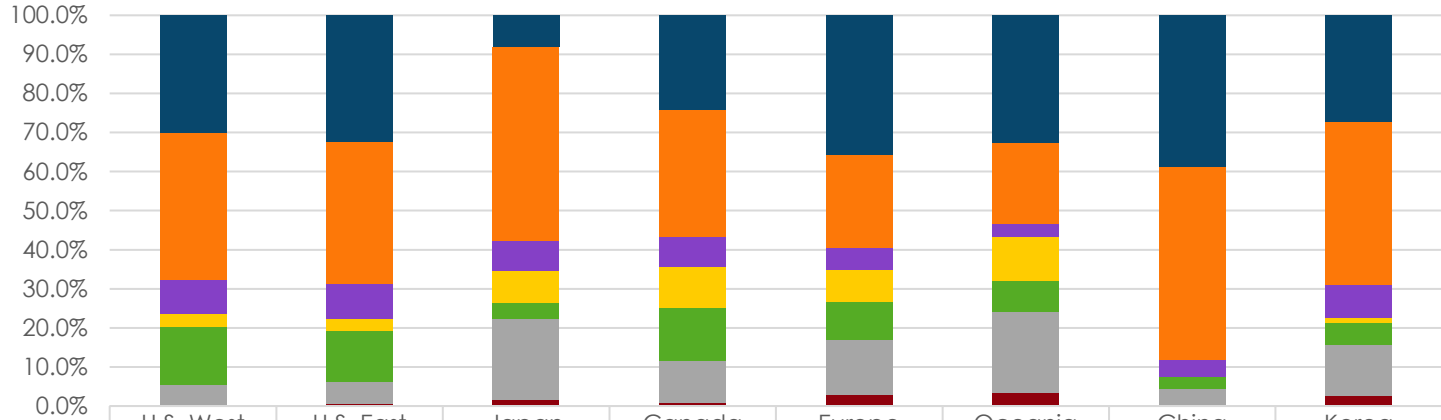
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# SECTION – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION

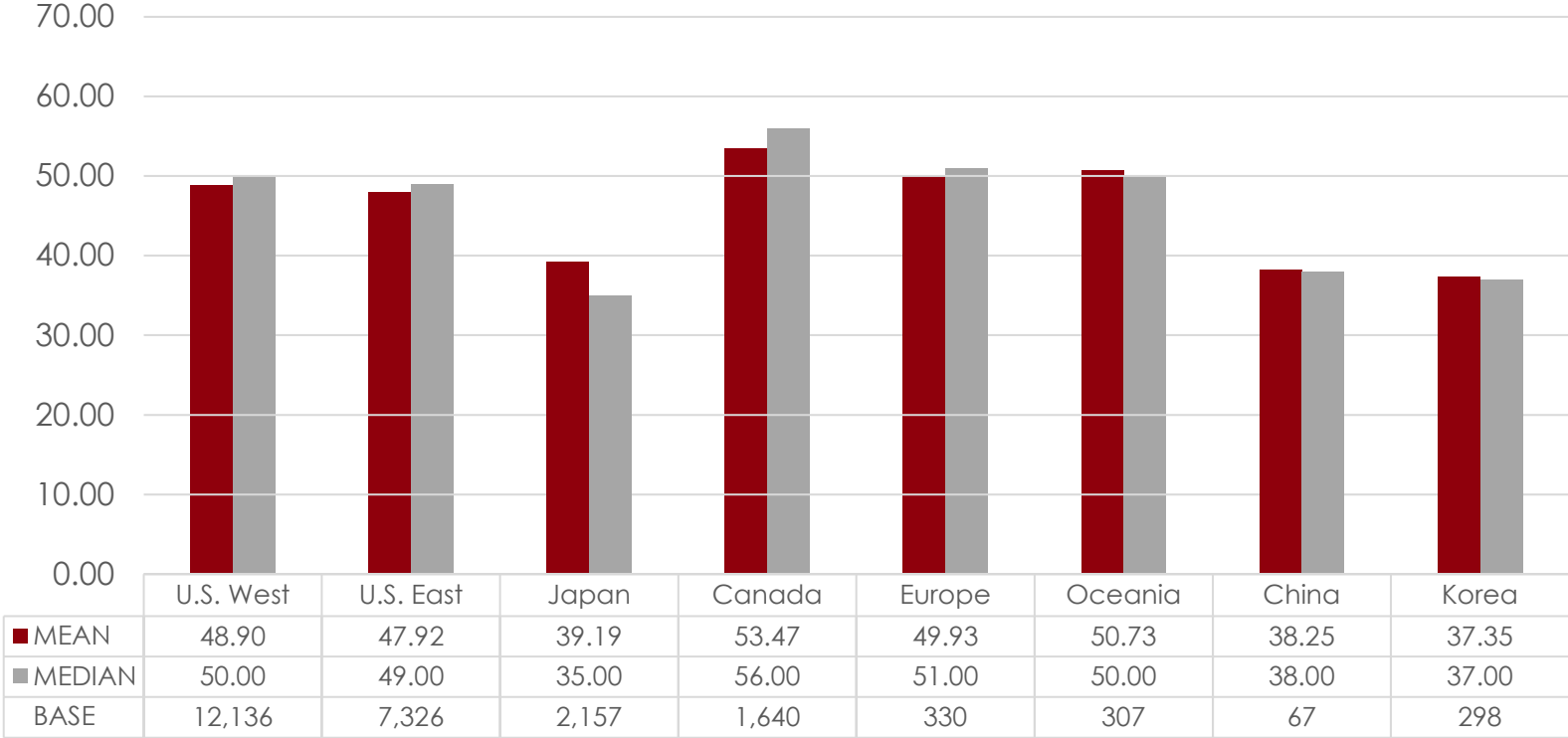


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Post-Graduate	30.2%	32.4%	8.1%	24.1%	35.6%	32.7%	38.9%	27.4%
College Grad	37.6%	36.4%	49.6%	32.7%	24.0%	20.6%	49.2%	41.6%
Associate Degree	8.5%	8.9%	7.7%	7.6%	5.4%	3.4%	4.5%	8.3%
Vocational/ Tech	3.5%	3.0%	8.1%	10.4%	8.4%	11.4%	0.0%	1.3%
Some College	15.0%	13.4%	4.3%	13.8%	9.6%	7.8%	3.0%	5.7%
H.S. Grad	4.9%	5.5%	20.6%	10.7%	14.1%	20.8%	4.5%	13.0%
Some / No H.S.	0.4%	0.5%	1.6%	0.7%	2.9%	3.4%	0.0%	2.7%
BASE	12,141	7,337	2,161	1,639	330	305	67	300

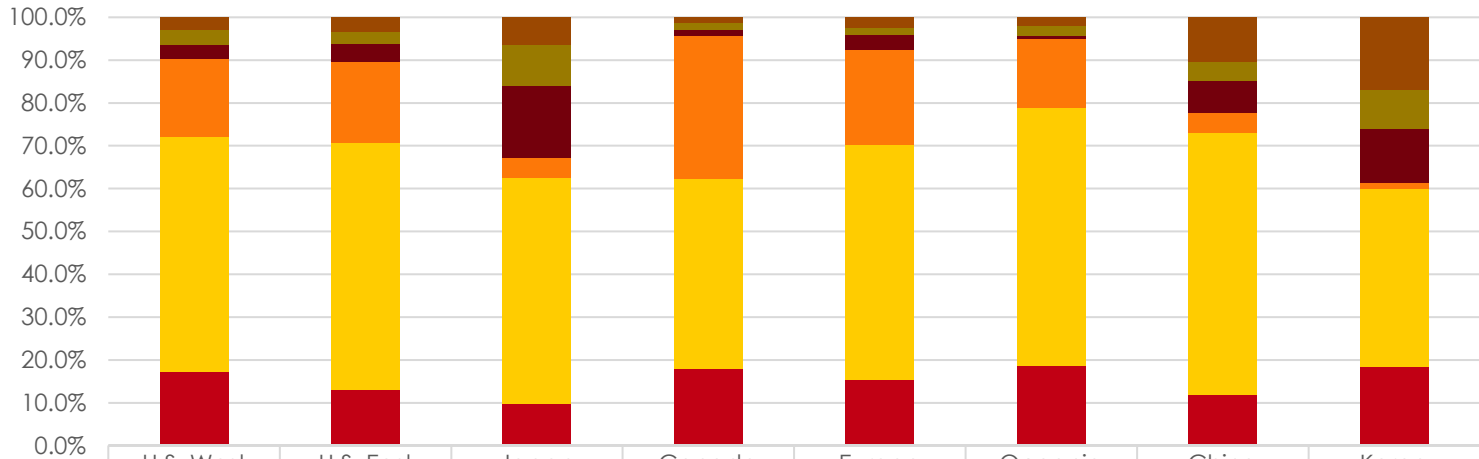
## VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	6.9%	8.3%	5.8%	13.8%	6.7%
\$40,000 to \$59,999	6.8%	9.1%	9.0%	18.2%	8.7%
\$60,000 to \$79,999	8.9%	10.4%	10.8%	11.1%	12.3%
\$80,000 to \$99,999	8.8%	10.5%	13.7%	11.0%	10.7%
\$100,000 to \$124,999	12.1%	12.9%	14.9%	11.6%	13.0%
\$125,000 to \$149,999	10.8%	10.6%	12.3%	9.2%	13.7%
\$150,000 to \$174,999	9.5%	8.5%	8.6%	6.4%	9.8%
\$175,000 to \$199,999	6.9%	5.6%	6.5%	3.4%	7.9%
\$200,000 to \$249,999	9.0%	7.9%	7.8%	5.2%	5.6%
\$250,000 +	20.4%	16.3%	10.5%	10.0%	11.7%

# VISITOR PROFILE – AGE

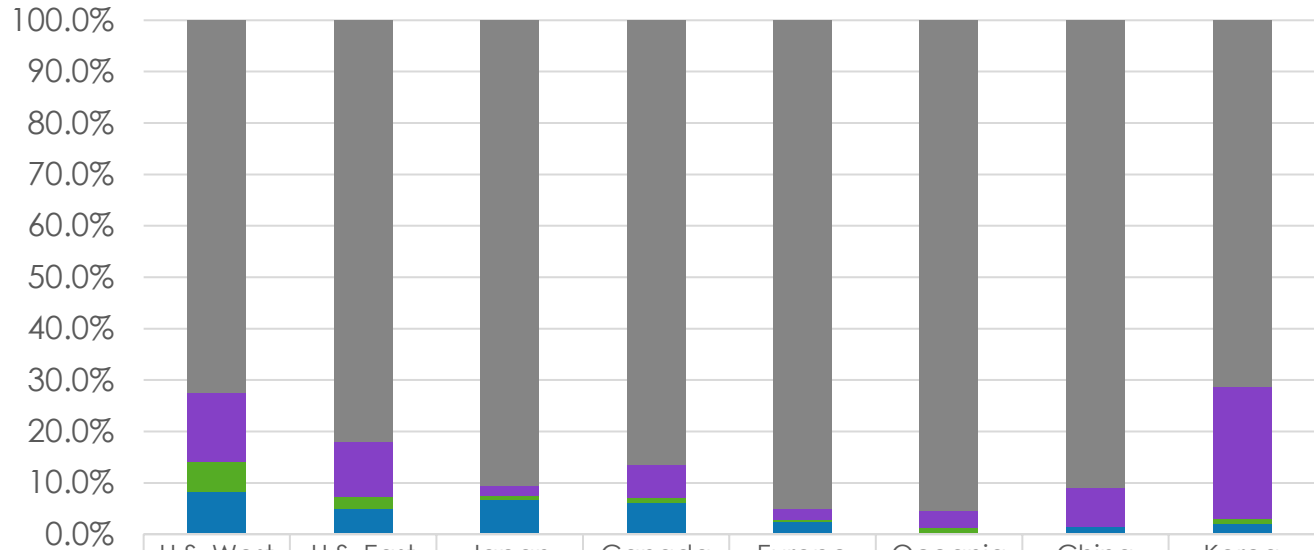


# VISITOR PROFILE – EMPLOYMENT STATUS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other	2.9%	3.4%	6.5%	1.2%	2.4%	2.1%	10.4%	17.0%
Homemaker	3.7%	2.7%	9.4%	1.7%	1.7%	2.2%	4.5%	9.0%
Student	3.1%	4.2%	16.9%	1.3%	3.4%	0.7%	7.5%	12.7%
Retired	18.4%	19.1%	4.5%	33.4%	22.2%	16.2%	4.5%	1.3%
Employed	54.7%	57.5%	52.8%	44.5%	54.9%	60.1%	61.2%	41.6%
Self-employed	17.3%	13.2%	9.8%	17.9%	15.4%	18.7%	12.0%	18.4%
BASE	12,141	7,337	2,161	1,639	330	305	67	300

# VISITOR PROFILE – HAWAI‘I PROPERTY OWNER



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Do not nor plan to purchase	72.4%	81.9%	90.6%	86.5%	95.1%	95.4%	91.0%	71.2%
Plan to in future	13.5%	10.7%	1.9%	6.3%	2.0%	3.2%	7.5%	25.8%
Other Property Type	6.0%	2.4%	0.7%	1.0%	0.6%	1.0%	0.0%	1.0%
Timeshare	8.1%	4.9%	6.8%	6.2%	2.4%	0.3%	1.5%	2.0%
BASE	12,141	7,337	2,161	1,639	330	305	67	300



# COMPETITIVE BRANDSET

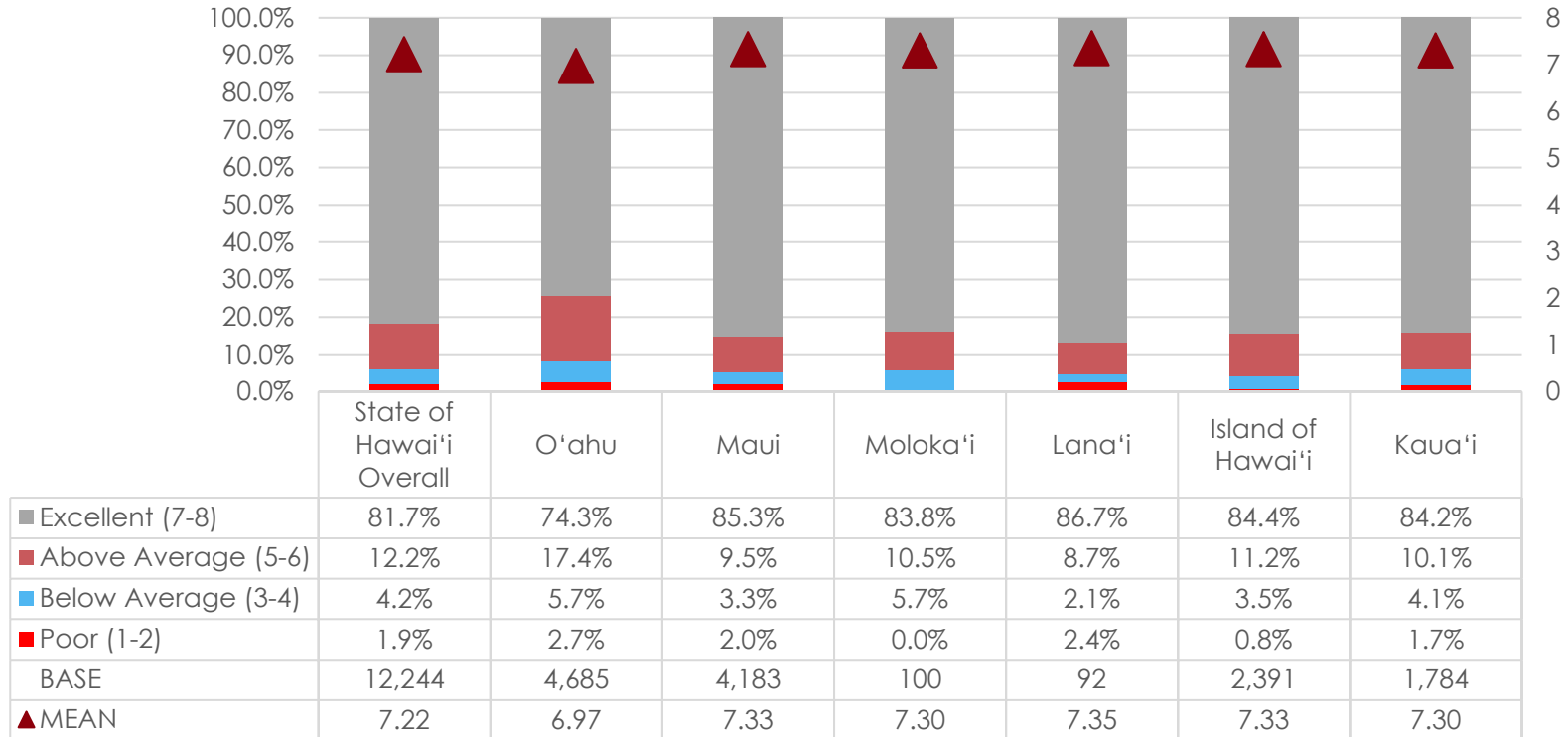
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other U.S. States	78.9%	83.9%	15.8%	70.7%	61.0%	56.3%	60.6%	23.8%
California	66.7%	48.3%	6.6%	38.1%	51.6%	46.5%	28.8%	16.1%
Las Vegas	53.8%	36.6%	5.4%	34.3%	31.8%	33.6%	21.2%	14.4%
Europe	40.4%	39.4%	19.1%	42.6%	87.5%	38.7%	27.3%	29.4%
Florida	31.6%	58.5%	3.2%	32.5%	31.0%	16.4%	7.6%	2.4%
Mexico	42.9%	32.9%	1.8%	39.9%	19.1%	9.0%	7.6%	3.7%
New York City	33.5%	45.9%	6.1%	28.5%	41.4%	36.0%	25.7%	13.7%
Canada	28.9%	27.0%	5.7%	65.3%	23.8%	19.7%	12.1%	8.0%
Caribbean	20.2%	34.4%	1.0%	31.6%	24.9%	7.3%	6.1%	1.0%
Japan	10.3%	8.3%	33.6%	6.6%	11.8%	14.7%	57.6%	52.0%
Alaska	16.3%	11.4%	0.7%	8.9%	3.9%	8.2%	3.0%	0.3%
Other Asia	10.4%	8.7%	20.4%	8.4%	22.8%	18.8%	27.2%	36.6%
Australia	8.0%	7.1%	11.3%	10.5%	20.0%	72.3%	25.7%	10.4%
Central America	10.6%	11.9%	0.8%	10.5%	8.1%	3.8%	1.5%	1.0%
Thailand	7.4%	6.1%	14.2%	6.1%	15.3%	19.0%	31.8%	25.7%
South America	9.1%	10.4%	1.4%	9.0%	11.4%	7.1%	1.5%	2.3%
China	6.8%	6.0%	12.8%	7.3%	12.6%	8.2%	56.0%	20.7%
Korea	4.4%	3.9%	20.0%	2.0%	3.1%	3.3%	22.7%	43.4%
New Zealand	5.5%	4.0%	2.6%	6.9%	10.8%	48.3%	16.7%	3.0%
Bali	3.5%	2.4%	7.7%	2.6%	8.7%	16.3%	18.2%	7.7%
Guam/ Saipan	0.9%	1.2%	15.6%	0.2%	0.3%	0.9%	10.6%	21.7%
Fiji	2.3%	1.1%	0.8%	1.9%	2.9%	22.1%	0.0%	0.3%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – U.S. WEST

# OVERALL SATISFACTION – MOST RECENT VISIT – U.S. WEST

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



# PRIMARY PURPOSE OF TRIP U.S. WEST

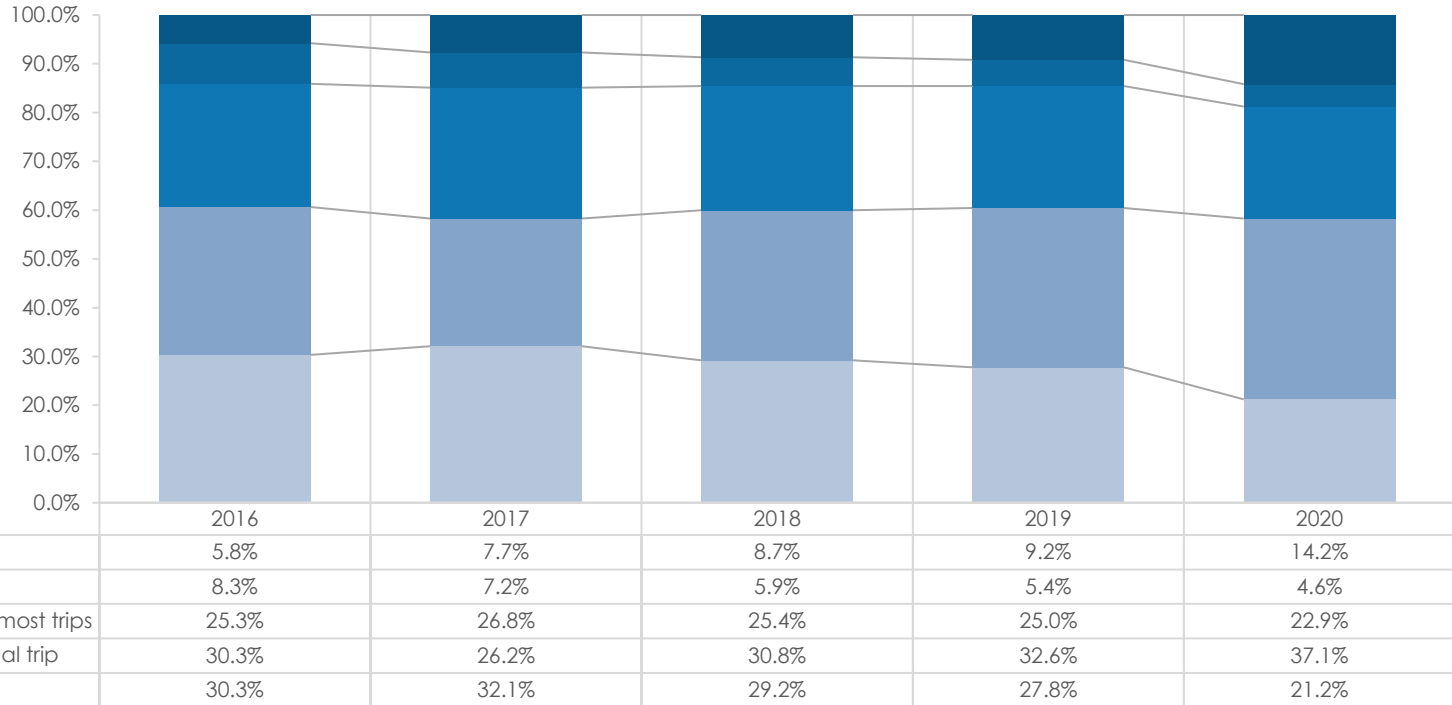
	2018	2019	2020
Vacation	59.5%	61.5%	64.6%
Visit friends or relatives	8.2%	7.7%	19.8%
Other business	3.9%	3.8%	4.3%
Anniversary/ birthday	7.8%	8.4%	1.6%
Honeymoon	2.0%	1.6%	1.4%
Government/ Military	0.1%	0.1%	1.0%
Have a vacation home/ timeshare	3.0%	2.8%	0.8%
Family gathering/ reunion	2.5%	2.7%	0.1%
Attend/ participate in a wedding/ vow renewal	3.2%	2.6%	0.4%
Attend a convention, conference or seminar	2.6%	1.8%	0.5%

# SECONDARY PURPOSE OF TRIP – MULTIPLE RESPONSE

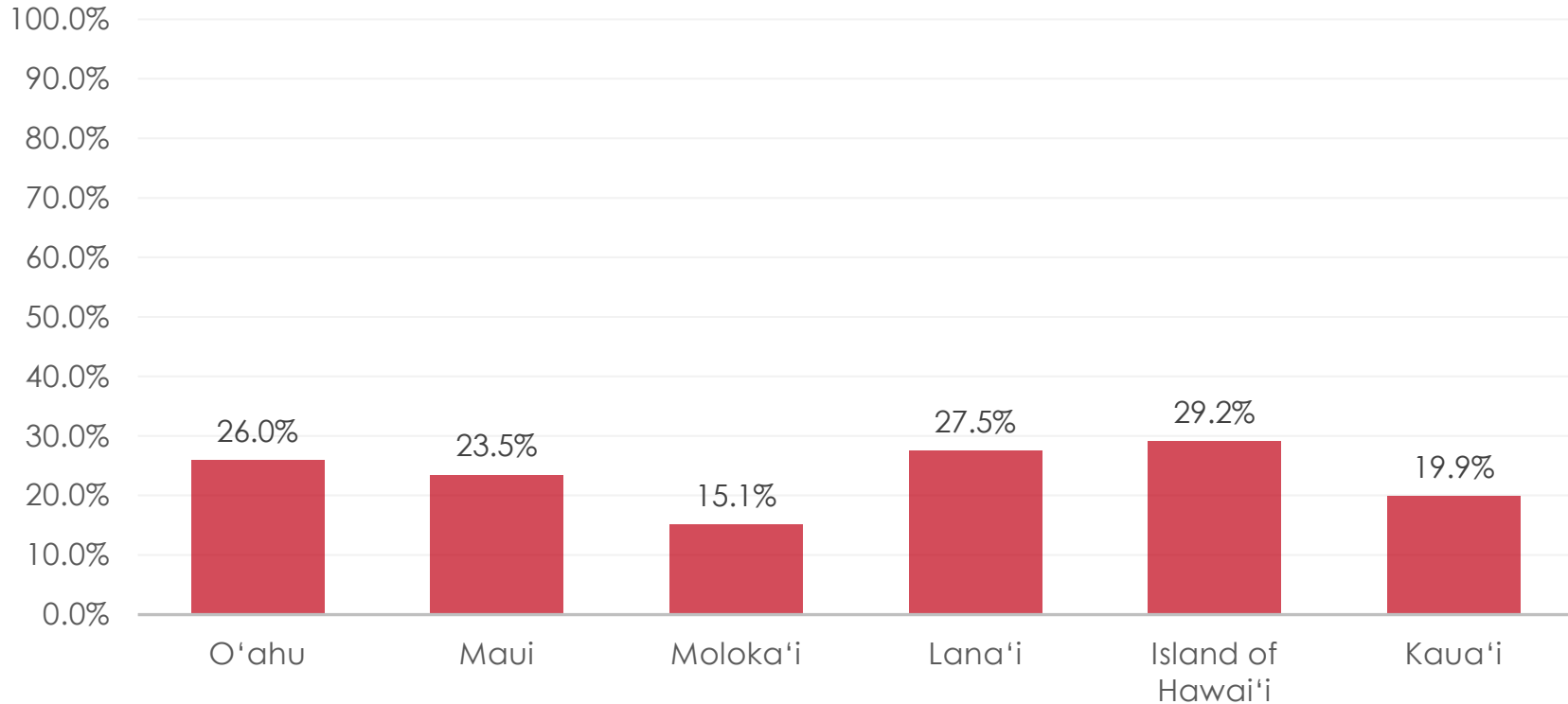
## U.S. WEST

	2018	2019	2020
Vacation	82.8%	84.1%	81.5%
Visit friends/ relatives	16.6%	15.9%	28.8%
Business trip	5.5%	5.4%	7.1%
Anniversary/ birthday	14.1%	15.8%	3.5%
Honeymoon	2.7%	2.3%	2.1%
Government/ military	0.3%	0.2%	1.2%
Incentive trip	1.6%	1.9%	1.0%
Vacation home/ timeshare	6.7%	6.3%	1.0%
Convention, conference, seminar	3.3%	2.3%	0.8%
Attend wedding/ vow renewal	0.9%	3.1%	0.6%
Family gathering/ reunion	7.1%	6.8%	0.1%

# VACATION TRIP DESCRIPTION – U.S. WEST

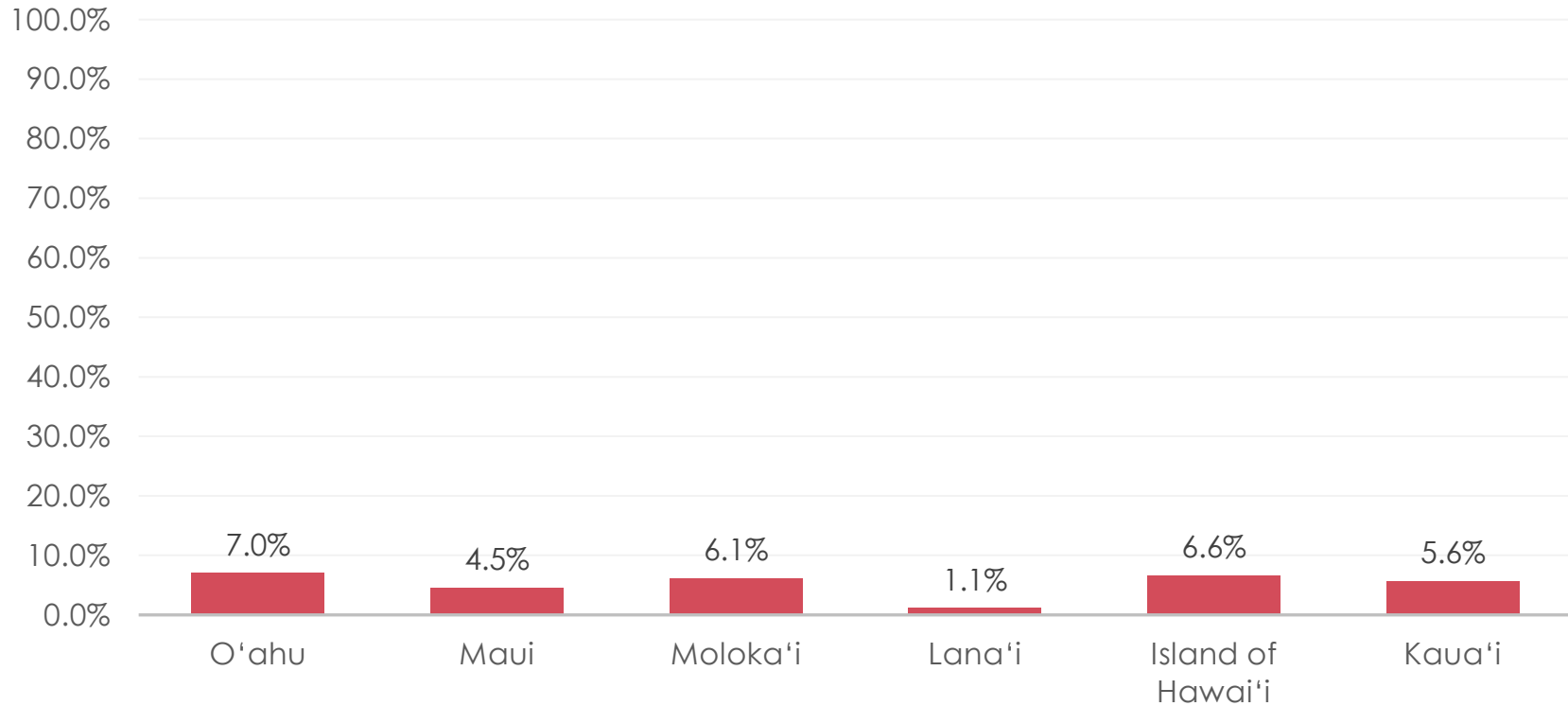


# ADVERTISING AWARENESS – U.S. WEST



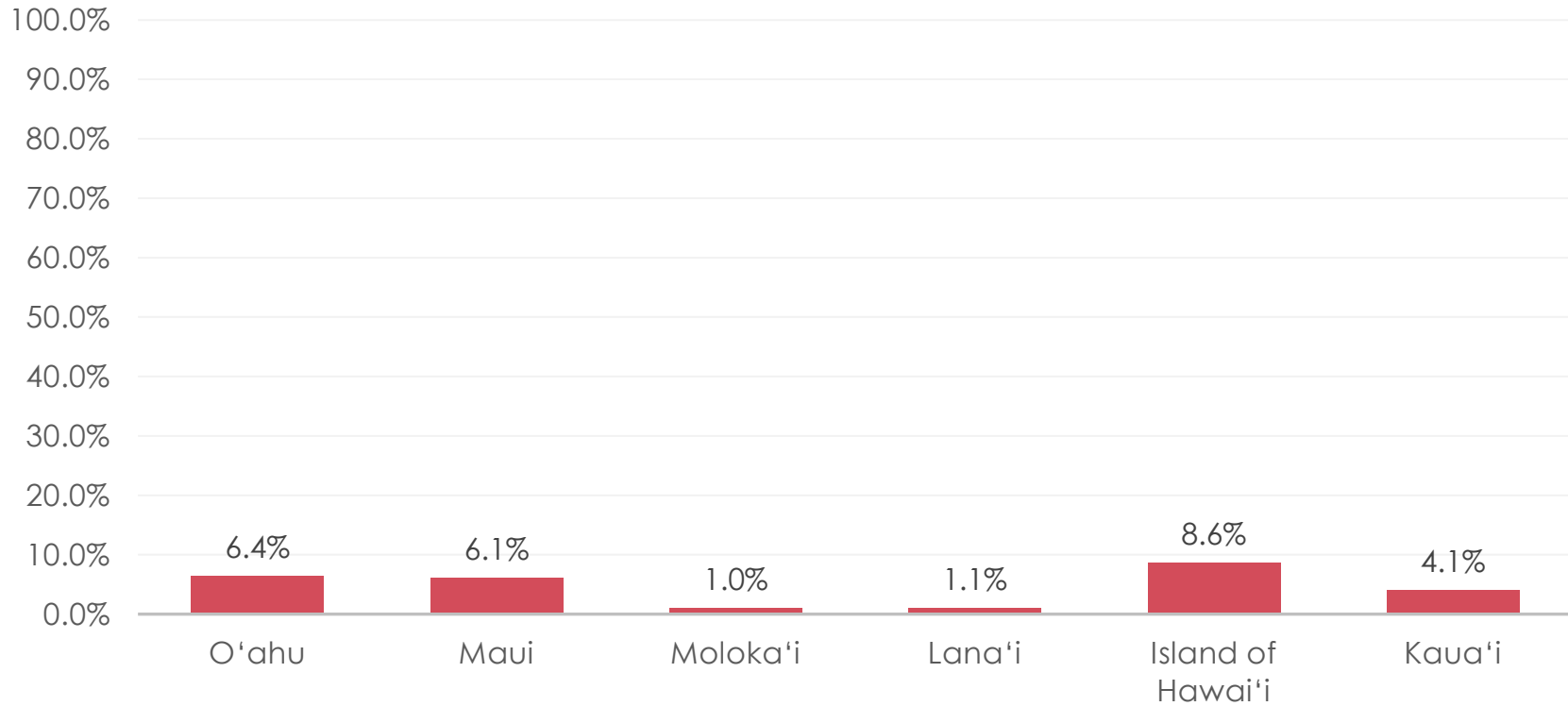
111 Q. Do you remember seeing or hearing advertising for \_\_\_ prior to your arrival?

# IMPACT OF LOCATION FILMING – U.S. WEST

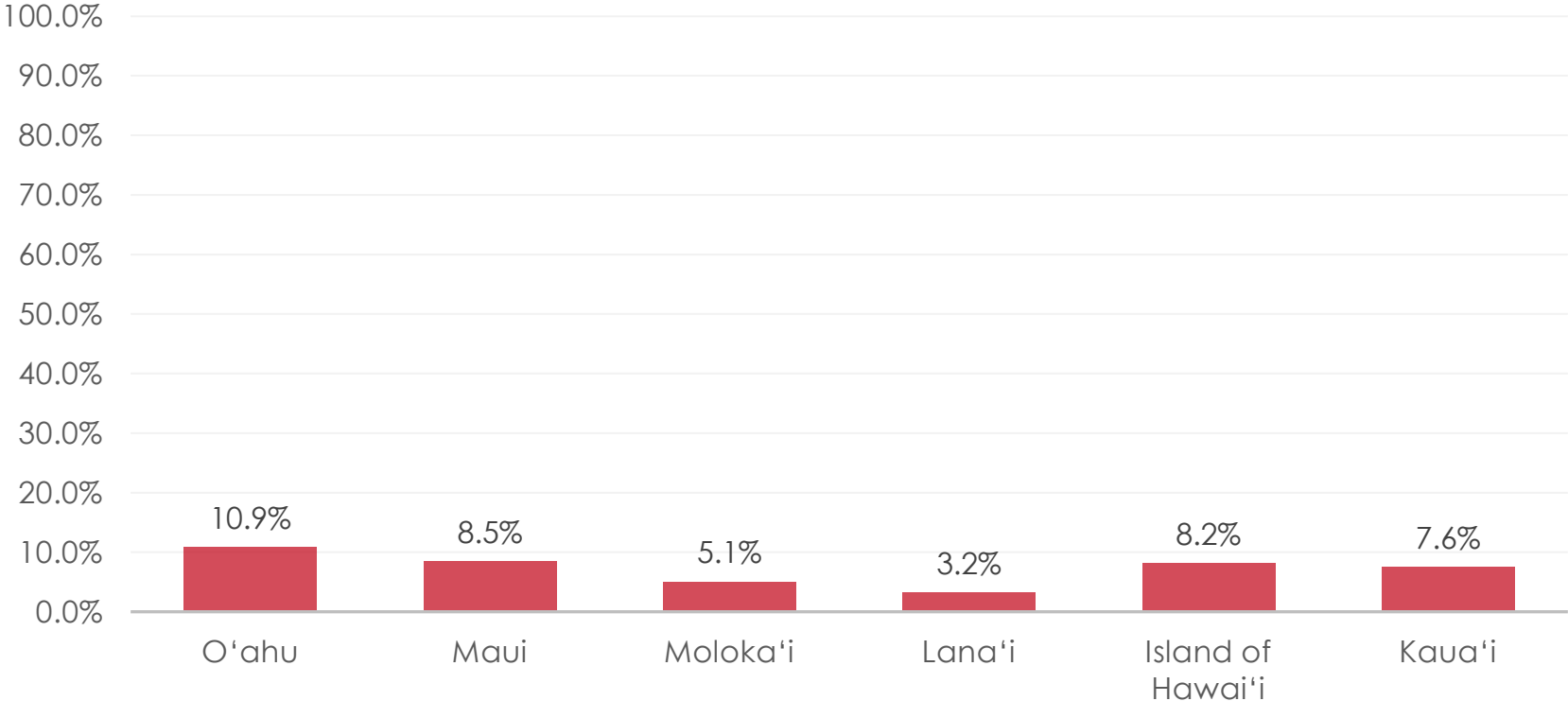




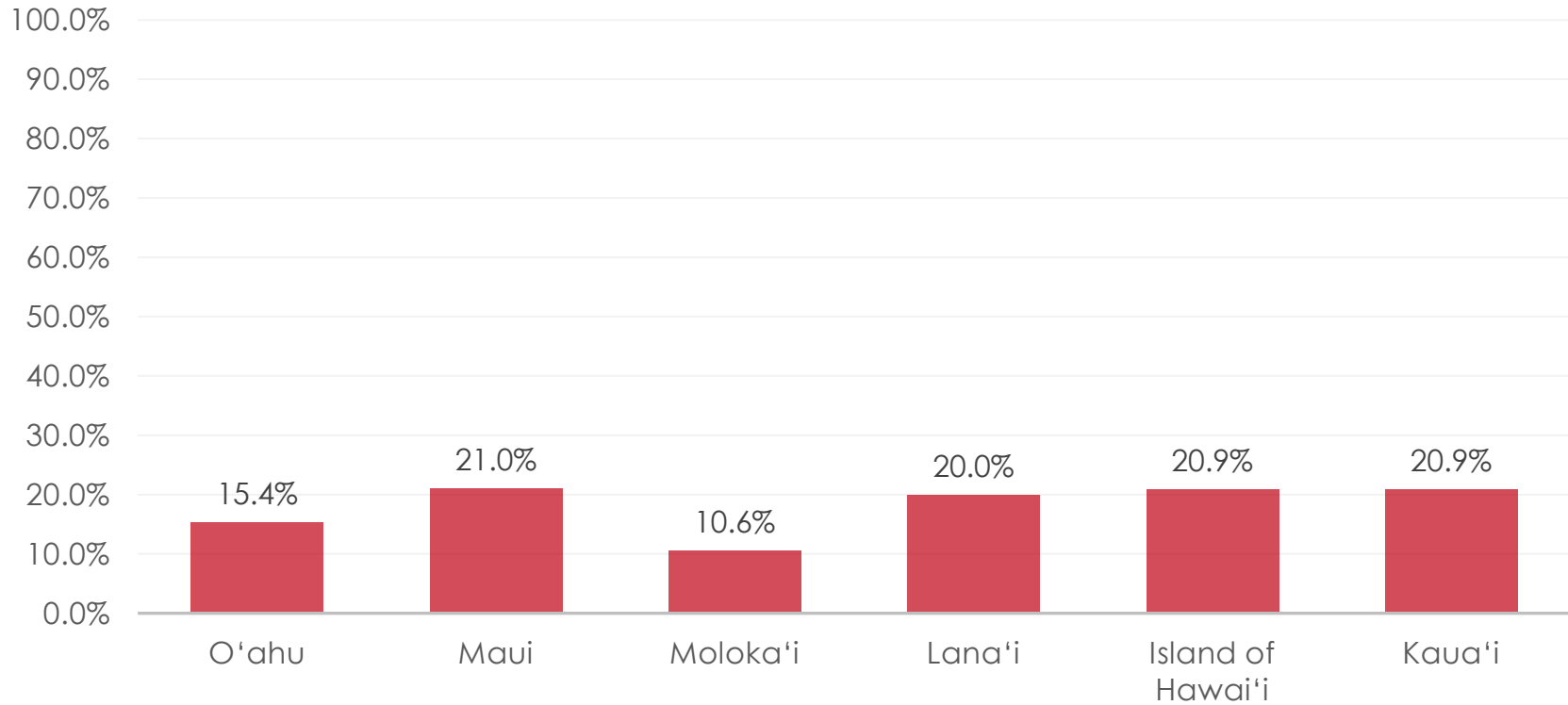
# IMPACT OF HAWAIIAN MUSIC – U.S. WEST



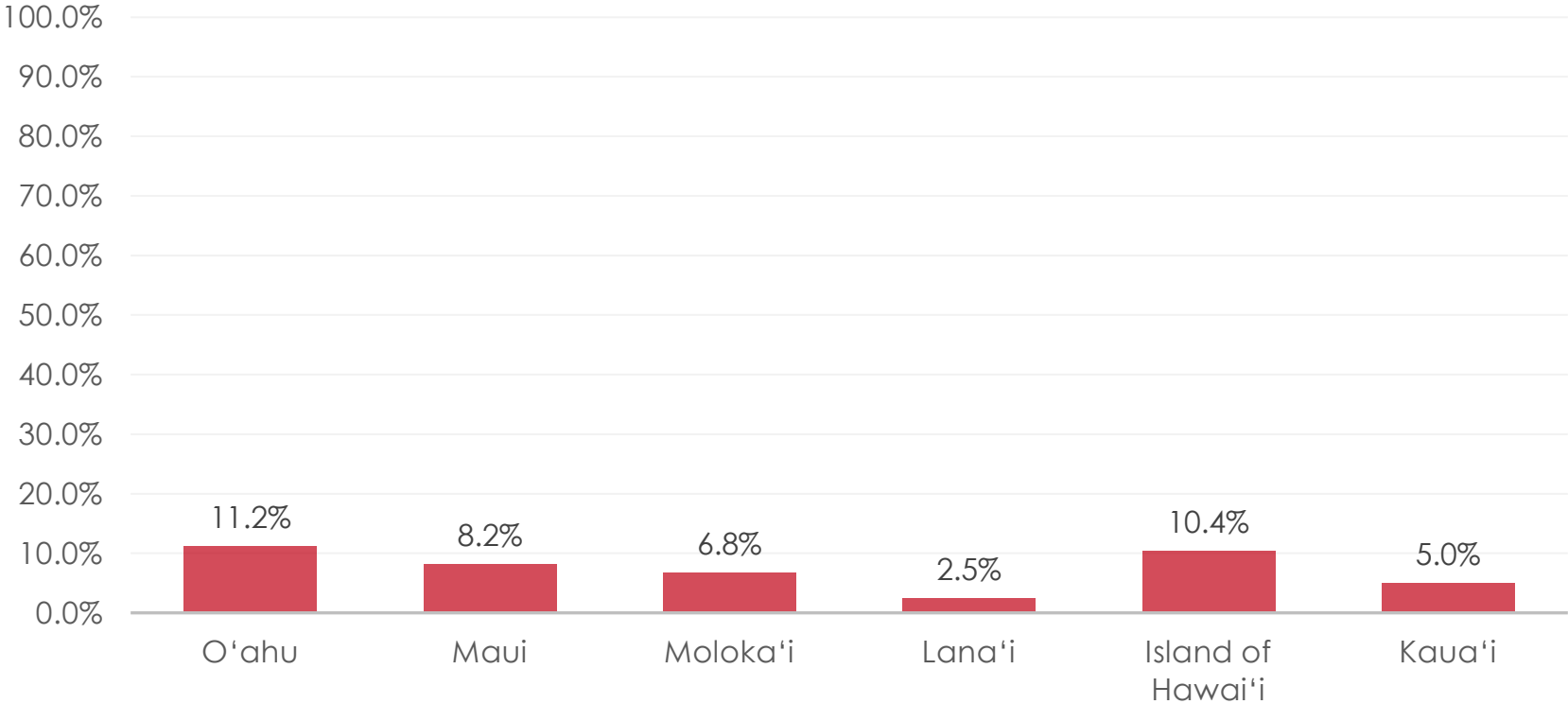
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – U.S. WEST



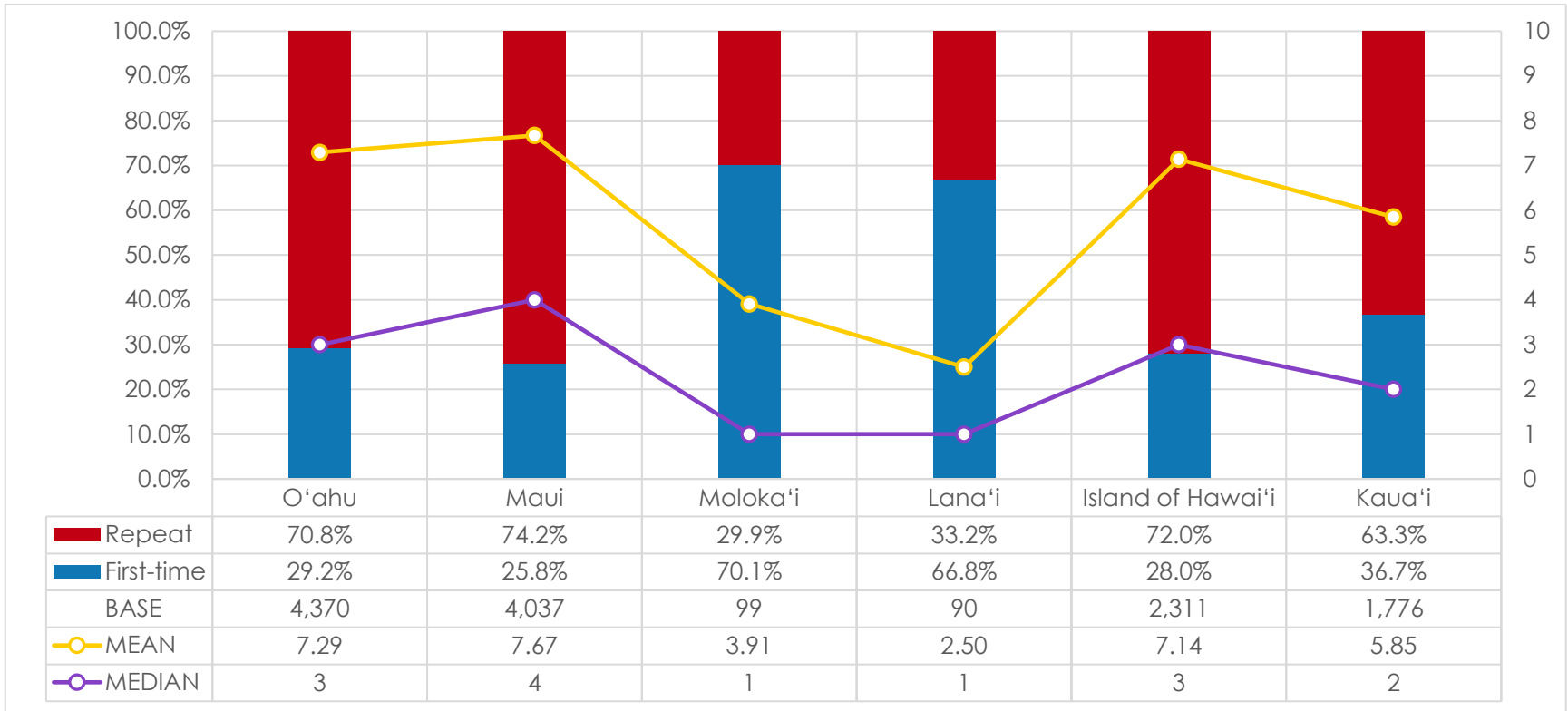
# IMPACT OF OUTDOOR/ SPORTING EVENTS – U.S. WEST



# IMPACT OF HAWAIIAN CULTURAL EVENTS – U.S. WEST



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – U.S. WEST

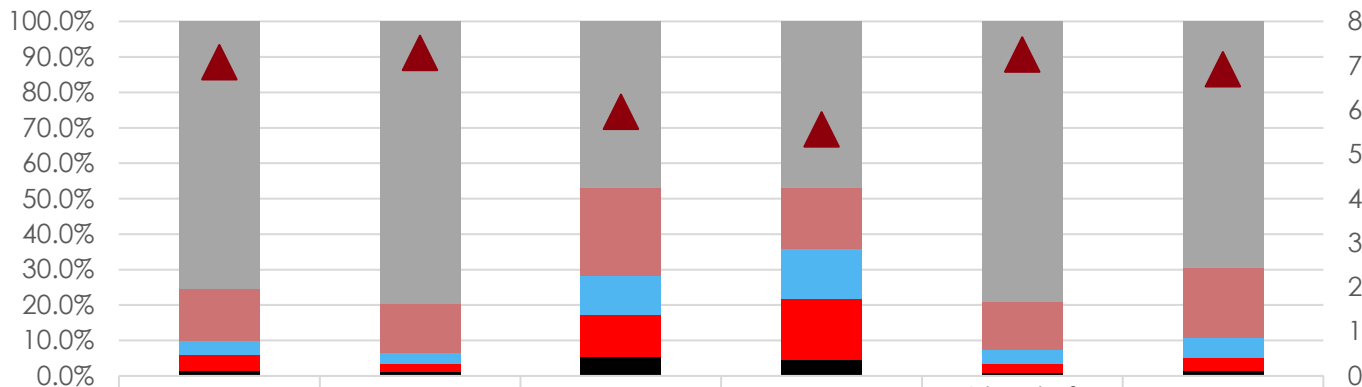


# TRAVEL PARTY MEMBERS – U.S. WEST

	2016	2017	2018	2019	2020
<b>Spouse</b>	63.3%	64.5%	61.1%	60.8%	51.5%
<b>Other adult family</b>	28.8%	29.1%	29.9%	28.7%	22.1%
<b>Child under 18</b>	25.4%	22.9%	27.6%	25.2%	22.8%
<b>Friends/ associates</b>	16.5%	15.9%	15.7%	16.2%	15.5%
<b>Alone</b>	10.7%	9.0%	9.0%	8.7%	17.2%
<b>Girlfriend/ boyfriend</b>	6.4%	5.5%	7.1%	7.6%	8.9%
<b>Same sex partner</b>	.6%	1.1%	1.2%	1.6%	1.1%

# LIKELIHOOD OF RETURN VISIT – U.S. WEST

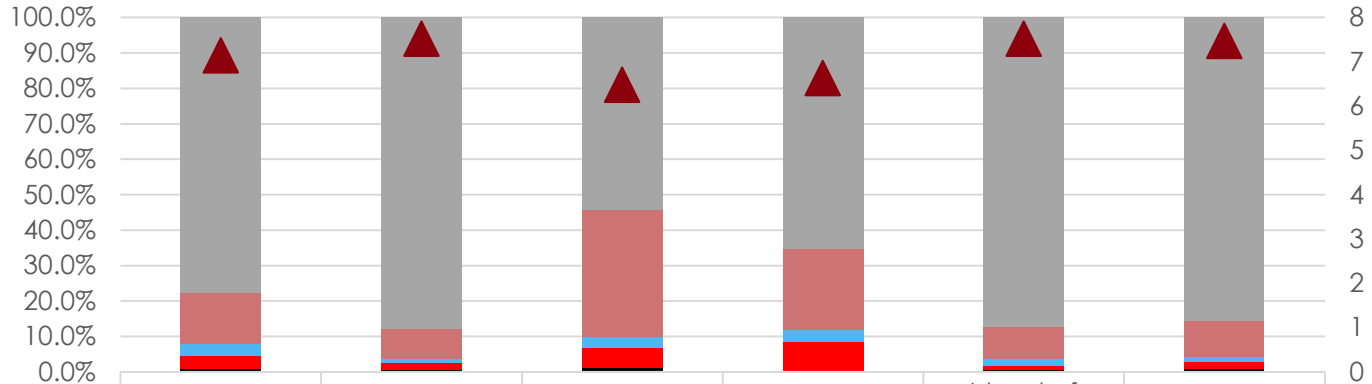
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



■ Very likely (7-8)	75.4%	79.9%	46.9%	46.8%	79.1%	69.5%
■ Somewhat likely (5-6)	14.8%	13.7%	24.6%	17.1%	13.7%	19.5%
■ Somewhat unlikely (3-4)	3.8%	2.9%	11.1%	14.3%	3.9%	5.8%
■ Very unlikely (1-2)	4.5%	2.5%	12.1%	17.1%	2.5%	3.7%
■ Not sure	1.5%	1.1%	5.2%	4.6%	0.8%	1.4%
BASE	4,368	4,035	97	90	2,307	1,776
▲ MEAN	7.08	7.29	5.96	5.56	7.25	6.92

# BRAND/DESTINATION ADVOCACY – U.S. WEST

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	77.7%	87.8%	54.4%	65.4%	87.4%	85.7%
■ Somewhat likely (5-6)	14.4%	8.5%	35.7%	22.9%	9.0%	10.1%
■ Somewhat unlikely (3-4)	3.2%	1.2%	3.0%	3.2%	1.8%	1.4%
■ Very unlikely (1-2)	3.7%	1.9%	5.9%	8.6%	1.3%	2.1%
■ Not sure	1.0%	0.6%	1.0%	0.0%	0.5%	0.8%
BASE	4,367	4,035	97	90	2,307	1,775
▲ MEAN	7.14	7.52	6.48	6.63	7.52	7.47



## ACTIVITIES – SIGHTSEEING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	88.3%	92.3%	96.0%	91.0%	93.2%	95.5%
<b>On own (self guided)</b>	77.2%	81.3%	79.5%	41.5%	85.6%	88.0%
<b>Helicopter/ airplane</b>	1.3%	1.8%	2.0%	1.1%	2.6%	8.2%
<b>Boat/ submarine/ whale watching</b>	11.3%	30.4%	19.2%	24.5%	20.5%	19.8%
<b>Visit towns/communities</b>	34.7%	48.0%	62.3%	36.5%	51.3%	55.2%
<b>Limo/ van/ bus tour</b>	3.9%	2.4%	9.6%	7.9%	1.9%	2.4%
<b>Scenic views/ natural landmark</b>	44.9%	51.2%	58.6%	50.5%	57.0%	65.8%
<b>Movie/ TV/ film location</b>	6.6%	0.3%	0.0%	0.0%	0.6%	3.0%

# STATEWIDE – ACTIVITIES – SIGHTSEEING – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	96.7%	95.8%	95.0%	91.6%
<b>On own (self guided)</b>	86.7%	85.1%	83.2%	81.8%
<b>Helicopter/ airplane</b>	8.7%	6.6%	5.9%	2.8%
<b>Boat/ submarine/ whale</b>	29.8%	25.9%	24.5%	20.9%
<b>Visit towns</b>	34.6%	56.3%	53.9%	45.4%
<b>Limo/ van/ bus tour</b>	9.5%	7.8%	7.5%	3.0%
<b>Scenic views/ natural landmark</b>	70.3%	61.4%	58.9%	52.3%
<b>Movie/ TV/ film location</b>	5.4%	4.1%	4.2%	3.0%

# ACTIVITIES – RECREATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	88.9%	96.9%	91.1%	89.9%	93.7%	96.0%
<b>Beach/ sunbathing</b>	76.5%	88.7%	71.5%	67.1%	79.0%	84.6%
<b>Bodyboard</b>	11.4%	16.7%	1.0%	1.4%	15.3%	15.8%
<b>Stand Up Paddleboard</b>	7.8%	9.2%	5.0%	1.1%	7.7%	5.9%
<b>Surfing</b>	13.1%	9.6%	0.0%	0.0%	4.8%	10.9%
<b>Canoeing/ kayak</b>	5.8%	5.2%	8.3%	0.0%	7.5%	12.5%
<b>Swim ocean</b>	59.3%	73.8%	38.4%	49.5%	65.4%	64.7%
<b>Snorkel</b>	32.8%	59.6%	24.5%	46.6%	54.1%	46.8%
<b>Freediving</b>	1.5%	2.9%	2.0%	0.0%	2.4%	1.6%
<b>Windsurf/ Kitesurf</b>	0.2%	0.7%	0.0%	0.0%	0.1%	0.1%
<b>Jet ski/ Parasail</b>	1.5%	2.3%	0.0%	1.1%	0.5%	0.1%
<b>Scuba</b>	2.5%	5.2%	1.0%	3.2%	4.7%	3.5%
<b>Fishing</b>	2.6%	4.0%	8.3%	1.4%	5.9%	3.5%
<b>Golf</b>	4.5%	10.3%	4.0%	7.9%	10.2%	9.9%

# STATEWIDE - ACTIVITIES – RECREATION – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	96.5%	97.0%	96.4%	93.7%
<b>Beach/ sunbathing</b>	85.3%	85.5%	84.7%	82.6%
<b>Bodyboard</b>	20.3%	17.0%	14.0%	14.7%
<b>Standup Paddle Boarding</b>	*	*	*	8.2%
<b>Surfing</b>	7.1%	6.7%	6.3%	10.3%
<b>Canoeing/ kayak</b>	10.2%	8.7%	8.0%	7.0%
<b>Swim ocean</b>	NA	68.3%	67.7%	66.5%
<b>Snorkel</b>	NA	49.9%	48.1%	47.9%
<b>Freediving</b>	NA	NA	NA	2.1%
<b>Windsurf/ Kitesurf</b>	0.4%	0.2%	0.3%	0.3%
<b>Jet ski/ Parasail</b>	2.4%	2.3%	1.8%	1.4%
<b>Scuba</b>	4.1%	3.1%	3.4%	4.0%
<b>Fishing</b>	3.7%	3.4%	3.5%	3.9%
<b>Golf</b>	9.1%	7.4%	6.9%	8.3%

\* Combined with bodyboarding

## ACTIVITIES – RECREATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	88.9%	96.9%	91.1%	89.9%	93.7%	96.0%
<b>Run/ Jog/ Fitness walk</b>	33.2%	44.6%	28.5%	20.6%	36.2%	38.8%
<b>Spa</b>	4.1%	8.6%	0.0%	15.9%	5.6%	6.2%
<b>Hiking</b>	39.0%	43.7%	49.3%	35.0%	49.7%	55.6%
<b>Backpack/Camping</b>	1.2%	1.9%	5.3%	1.1%	1.8%	2.6%
<b>Agritourism</b>	7.0%	6.2%	24.8%	2.2%	11.7%	8.4%
<b>Sport event/ tournament</b>	1.0%	0.7%	2.0%	0.0%	0.8%	0.4%
<b>Park/ botanical garden</b>	24.7%	24.3%	15.6%	8.3%	31.4%	31.3%
<b>Waterpark</b>	1.3%	0.4%	0.0%	0.0%	0.6%	0.8%
<b>Mountain tube/ waterfall rappel</b>	0.3%	0.5%	0.0%	0.0%	0.8%	6.3%
<b>Zip lining</b>	2.7%	3.9%	0.0%	3.6%	2.8%	2.5%
<b>Skydiving</b>	0.7%	0.1%	0.0%	0.0%	0.4%	0.2%
<b>All terrain vehicle (ATV)</b>	3.8%	1.1%	2.0%	5.4%	1.8%	4.1%
<b>Horseback riding</b>	1.6%	1.3%	0.0%	4.3%	2.0%	3.1%

# STATEWIDE – ACTIVITIES – RECREATION – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	96.5%	97.0%	96.4%	93.7%
<b>Run/ Jog/ Fitness walk</b>	35.5%	30.8%	26.3%	38.8%
<b>Spa</b>	9.2%	10.1%	9.6%	6.3%
<b>Hiking</b>	28.5%	32.4%	47.0%	45.5%
<b>Backpack/Camp</b>	*	*	1.8%	1.8%
<b>Agritourism</b>	9.9%	13.6%	13.5%	8.1%
<b>Sport event/ tournament</b>	1.9%	2.8%	2.8%	0.8%
<b>Park/ botanical garden</b>	40.7%	38.2%	35.4%	26.9%
<b>Waterpark</b>	NA	1.5%	1.4%	0.8%
<b>Mountain tube/ waterfall rappel</b>	NA	2.0%	2.3%	1.3%
<b>Zip lining</b>	NA	6.0%	6.1%	3.2%
<b>Skydiving</b>	NA	0.4%	0.6%	0.4%
<b>All terrain vehicle (ATV)</b>	NA	2.9%	3.0%	2.7%
<b>Horseback riding</b>	NA	2.3%	2.1%	1.8%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.7%	98.3%	91.7%	84.5%	98.3%	98.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	14.7%	20.3%	9.6%	22.0%	13.4%	14.2%
<b>Live music/ stage show</b>	11.0%	11.7%	19.9%	4.3%	13.7%	12.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.6%	4.5%	5.3%	0.0%	5.9%	3.4%
<b>Fine dining</b>	35.1%	52.9%	16.2%	35.7%	41.1%	47.8%
<b>Family restaurant</b>	51.5%	58.0%	39.7%	25.3%	56.1%	56.0%
<b>Fast food</b>	48.5%	30.1%	29.5%	1.1%	32.9%	30.0%
<b>Food truck</b>	40.3%	36.9%	23.8%	2.2%	18.3%	43.8%
<b>Café/ coffee house</b>	38.1%	40.5%	30.8%	19.1%	45.2%	46.1%
<b>Ethnic dining</b>	25.8%	20.8%	10.3%	1.1%	22.6%	21.5%
<b>Prepared own meal</b>	51.8%	69.2%	63.9%	27.1%	72.6%	70.1%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	98.9%	98.4%	98.1%	97.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	27.3%	23.0%	20.9%	16.4%
<b>Live music/ stage show</b>	31.6%	32.2%	30.3%	12.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	9.3%	9.4%	8.9%	4.7%
<b>Fine dining</b>	53.2%	53.6%	53.1%	44.0%
<b>Family restaurant</b>	70.8%	62.8%	61.8%	55.5%
<b>Fast food</b>	39.4%	36.5%	34.7%	37.4%
<b>Food truck</b>	NA	30.7%	30.6%	36.1%
<b>Café/ coffee house</b>	42.5%	46.6%	46.0%	41.6%
<b>Ethnic dining</b>	30.5%	31.9%	31.9%	23.2%
<b>Prepared own meal</b>	52.2%	55.1%	52.1%	64.6%



## ACTIVITIES – SHOPPING – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	89.0%	95.0%	89.1%	58.8%	94.3%	95.0%
<b>Mall/ department store</b>	44.8%	34.8%	1.0%	1.1%	23.4%	22.2%
<b>Designer boutique</b>	11.7%	16.3%	3.3%	6.9%	10.4%	17.5%
<b>Hotel/ resort store</b>	23.8%	22.8%	3.0%	14.8%	18.6%	14.4%
<b>Swap meet/ flea market</b>	14.1%	7.9%	5.3%	1.1%	9.9%	5.4%
<b>Discount/ outlet store</b>	12.2%	15.9%	2.0%	1.1%	10.1%	12.2%
<b>Supermarket</b>	60.2%	77.1%	57.0%	18.8%	77.3%	77.4%
<b>Farmer's market</b>	17.6%	27.7%	31.1%	7.9%	50.6%	41.7%
<b>Convenience store</b>	46.7%	45.6%	30.1%	17.3%	38.5%	39.4%
<b>Duty free store</b>	2.9%	1.2%	0.0%	0.0%	0.9%	0.7%
<b>Local shop/ artisan</b>	41.4%	59.1%	58.6%	26.4%	57.6%	66.4%

# STATEWIDE – ACTIVITIES – SHOPPING – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	97.0%	96.7%	95.9%	92.9%
<b>Mall/ department store</b>	43.6%	42.4%	42.0%	34.8%
<b>Designer boutique</b>	22.3%	17.5%	17.3%	13.9%
<b>Hotel/ resort store</b>	33.0%	33.5%	33.1%	21.4%
<b>Swap meet/ flea market</b>	22.8%	17.4%	16.7%	10.2%
<b>Discount/ outlet store</b>	20.9%	17.3%	15.9%	13.1%
<b>Supermarket</b>	58.1%	68.2%	66.1%	71.8%
<b>Farmer's market</b>	33.0%	37.2%	37.0%	30.8%
<b>Convenience store</b>	42.9%	46.5%	46.9%	44.2%
<b>Duty free store</b>	3.1%	3.7%	3.8%	1.7%
<b>Local shop/ artisan</b>	68.4%	65.7%	64.7%	54.1%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	49.2%	36.7%	61.9%	36.8%	51.0%	42.7%
<b>Historic military site</b>	28.0%	2.4%	2.0%	1.1%	4.4%	4.6%
<b>Other historical site</b>	15.6%	15.4%	54.3%	20.2%	31.4%	22.4%
<b>Museum/ art gallery</b>	8.3%	10.1%	9.9%	14.1%	10.4%	9.2%
<b>Luau/ Polynesian show/ hula show</b>	9.2%	6.8%	2.3%	0.0%	7.6%	7.1%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	3.3%	2.2%	4.0%	1.1%	2.4%	2.0%
<b>Play/ concert/ theatre</b>	1.4%	0.9%	3.3%	0.0%	1.5%	0.9%
<b>Art/ craft fair</b>	3.3%	7.9%	6.3%	3.2%	10.8%	8.1%
<b>Festival event</b>	5.3%	4.1%	6.3%	4.7%	4.5%	5.0%

## STATEWIDE – ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	74.1%	71.8%	68.7%	45.0%
<b>Historic military site</b>	27.5%	18.6%	15.6%	12.2%
<b>Other historical site</b>	30.9%	29.2%	26.8%	19.9%
<b>Museum/ art gallery</b>	22.9%	19.2%	18.4%	9.6%
<b>Luau/ Polynesian show/ hula show</b>	37.3%	32.0%	29.4%	8.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.8%	7.1%	6.8%	2.7%
<b>Play/ concert/ theatre</b>	4.5%	4.7%	4.5%	1.2%
<b>Art/ craft fair</b>	14.4%	15.0%	14.6%	6.9%
<b>Festival event</b>	10.1%	5.3%	5.6%	4.9%

## ACTIVITIES – TRANSPORTATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	76.8%	91.5%	71.2%	65.7%	83.9%	92.2%
<b>Airport shuttle</b>	9.6%	5.1%	7.3%	24.5%	11.0%	12.4%
<b>Trolley</b>	0.9%	2.7%	0.0%	0.0%	0.6%	0.1%
<b>Public bus</b>	5.0%	1.0%	2.0%	2.5%	0.5%	1.0%
<b>Tour bus/ tour van</b>	3.9%	1.8%	9.6%	16.2%	1.5%	2.5%
<b>Taxi/ limo</b>	6.7%	3.9%	7.3%	11.9%	4.0%	4.2%
<b>Rental car</b>	58.2%	85.1%	59.3%	18.1%	78.6%	87.9%
<b>Ride share</b>	23.8%	9.1%	0.0%	0.0%	6.0%	3.8%
<b>Bicycle rental</b>	3.0%	2.0%	1.0%	0.0%	2.2%	3.3%

# STATEWIDE – ACTIVITIES – TRANSPORTATION – U.S. WEST

	2017	2018	2019	2020
<b>TOTAL</b>	95.1%	92.8%	92.3%	84.9%
<b>Airport shuttle</b>	19.6%	18.4%	15.6%	9.1%
<b>Trolley</b>	2.5%	2.3%	2.8%	1.3%
<b>Public bus</b>	5.2%	4.4%	3.9%	2.4%
<b>Tour bus/ tour van</b>	9.7%	8.9%	8.7%	2.8%
<b>Taxi/ limo</b>	13.4%	7.6%	6.2%	5.2%
<b>Rental car</b>	82.8%	80.0%	79.3%	74.8%
<b>Ride share</b>	NA	12.1%	15.1%	13.1%
<b>Bicycle rental</b>	NA	2.7%	2.2%	2.6%

## ACTIVITIES – OTHER – U.S. WEST

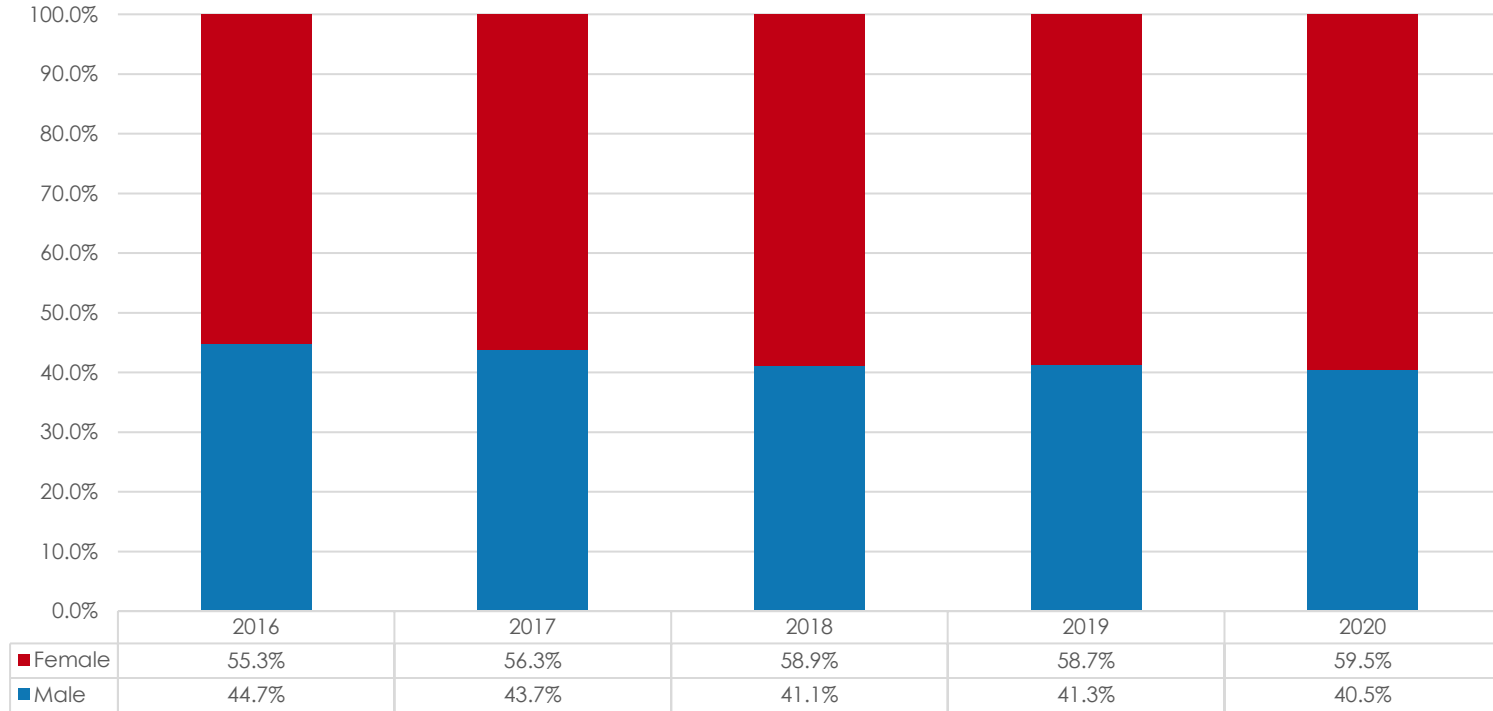
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	50.2%	25.7%	30.5%	15.9%	41.4%	23.6%
<b>Visit friends/ family</b>	49.8%	25.4%	30.5%	12.3%	40.9%	22.9%
<b>Volunteer non profit</b>	0.8%	0.8%	1.0%	3.6%	1.3%	0.9%

## ACTIVITIES – OTHER – U.S. WEST

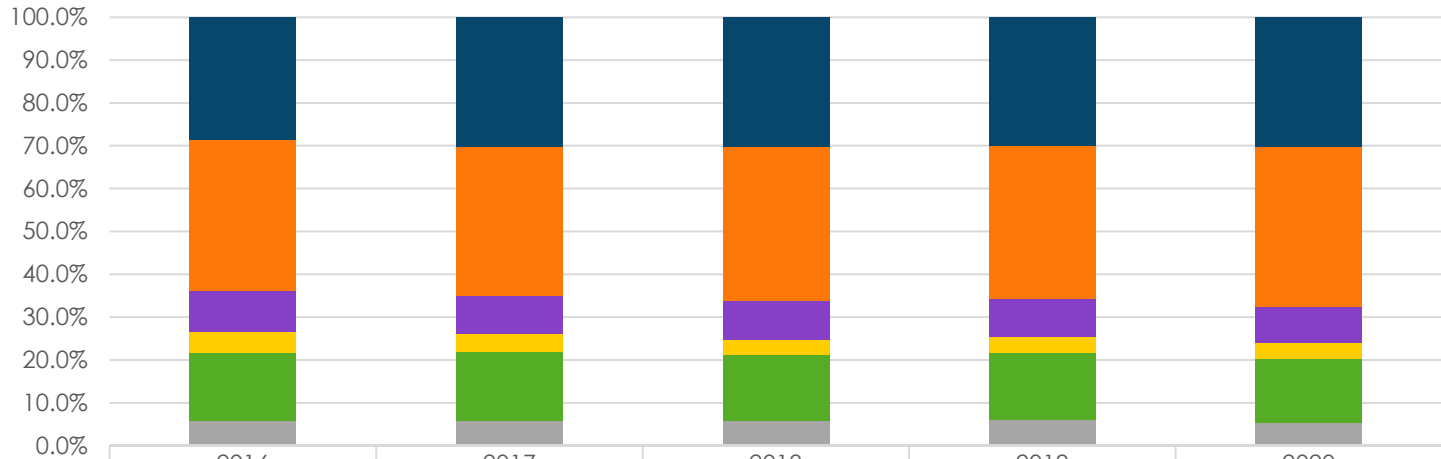
	2018	2019	2020
<b>TOTAL</b>	31.3%	29.7%	37.5%
<b>Visit friends/ family</b>	30.5%	29.0%	37.0%
<b>Volunteer non profit</b>	1.5%	1.0%	1.0%



# VISITOR PROFILE – GENDER – U.S. WEST

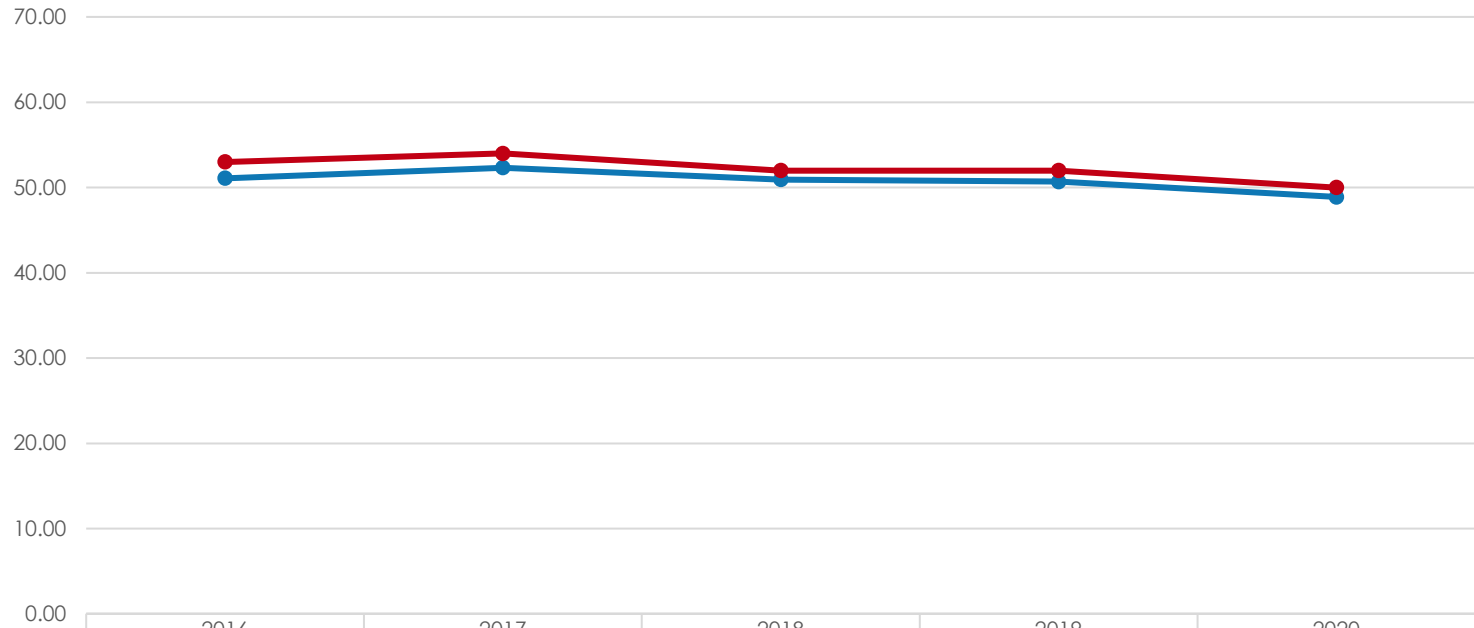


# VISITOR PROFILE – EDUCATION – U.S. WEST



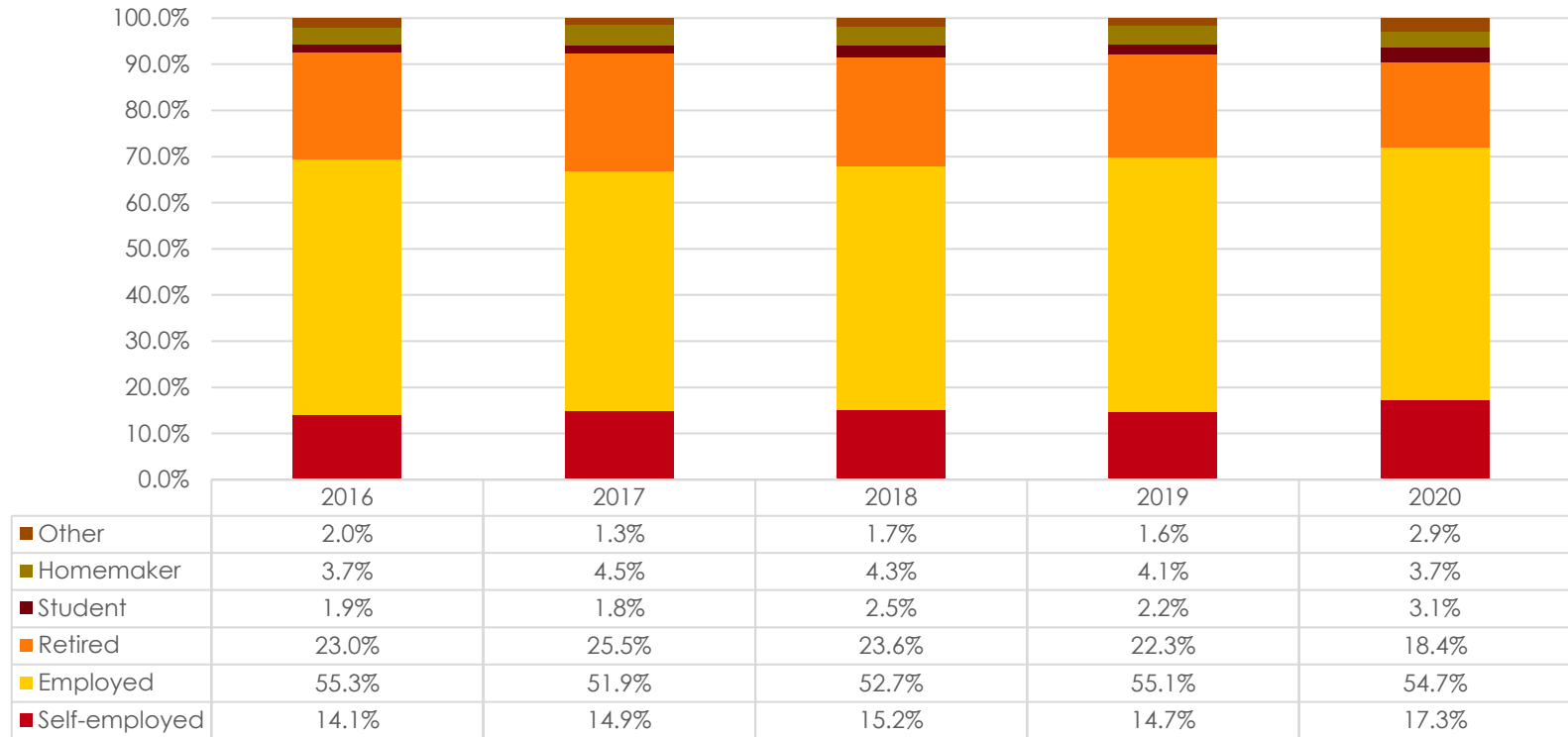
	2016	2017	2018	2019	2020
Post-Graduate	28.7%	30.3%	30.3%	29.9%	30.2%
College Grad	35.1%	34.6%	35.8%	35.8%	37.6%
Associate Degree	9.8%	9.0%	9.3%	9.0%	8.5%
Vocational/ Tech	4.8%	4.1%	3.4%	3.6%	3.5%
Some College	15.9%	16.3%	15.5%	15.9%	15.0%
H.S. Grad	5.3%	5.5%	5.3%	5.4%	4.9%
Some / No H.S.	0.4%	0.2%	0.4%	0.4%	0.4%

# VISITOR PROFILE – AGE – U.S. WEST

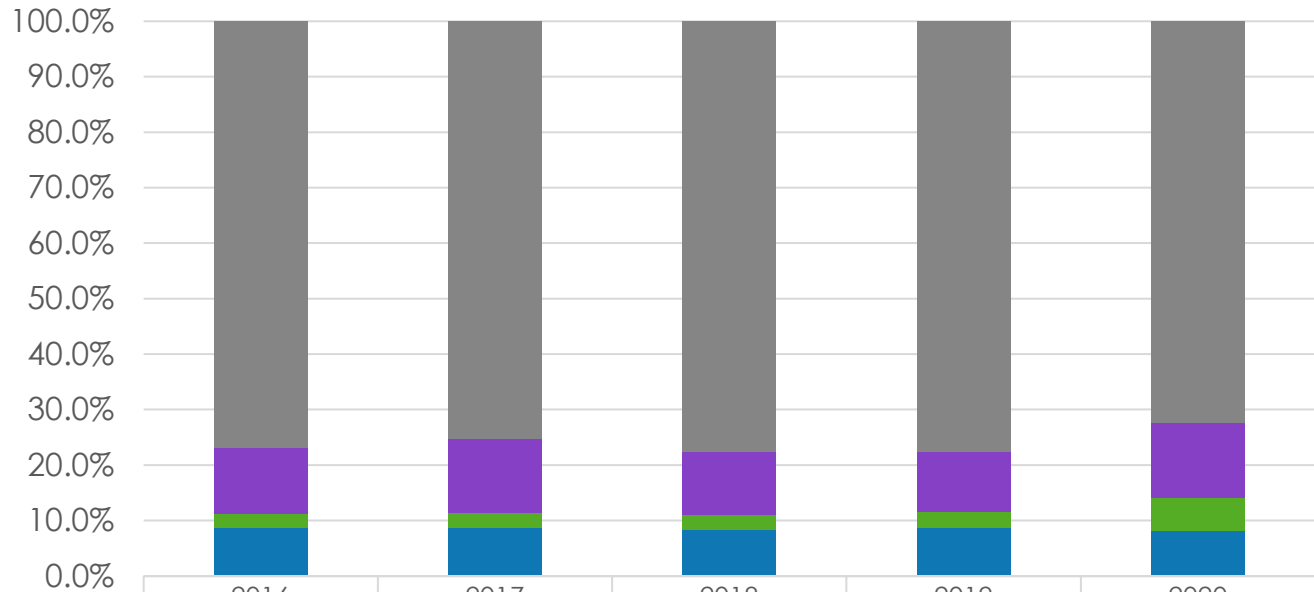


	2016	2017	2018	2019	2020
MEAN	51.09	52.33	50.94	50.69	48.90
MEDIAN	53.00	54.00	52.00	52.00	50.00

# VISITOR PROFILE – EMPLOYMENT STATUS – U.S. WEST



# VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. WEST



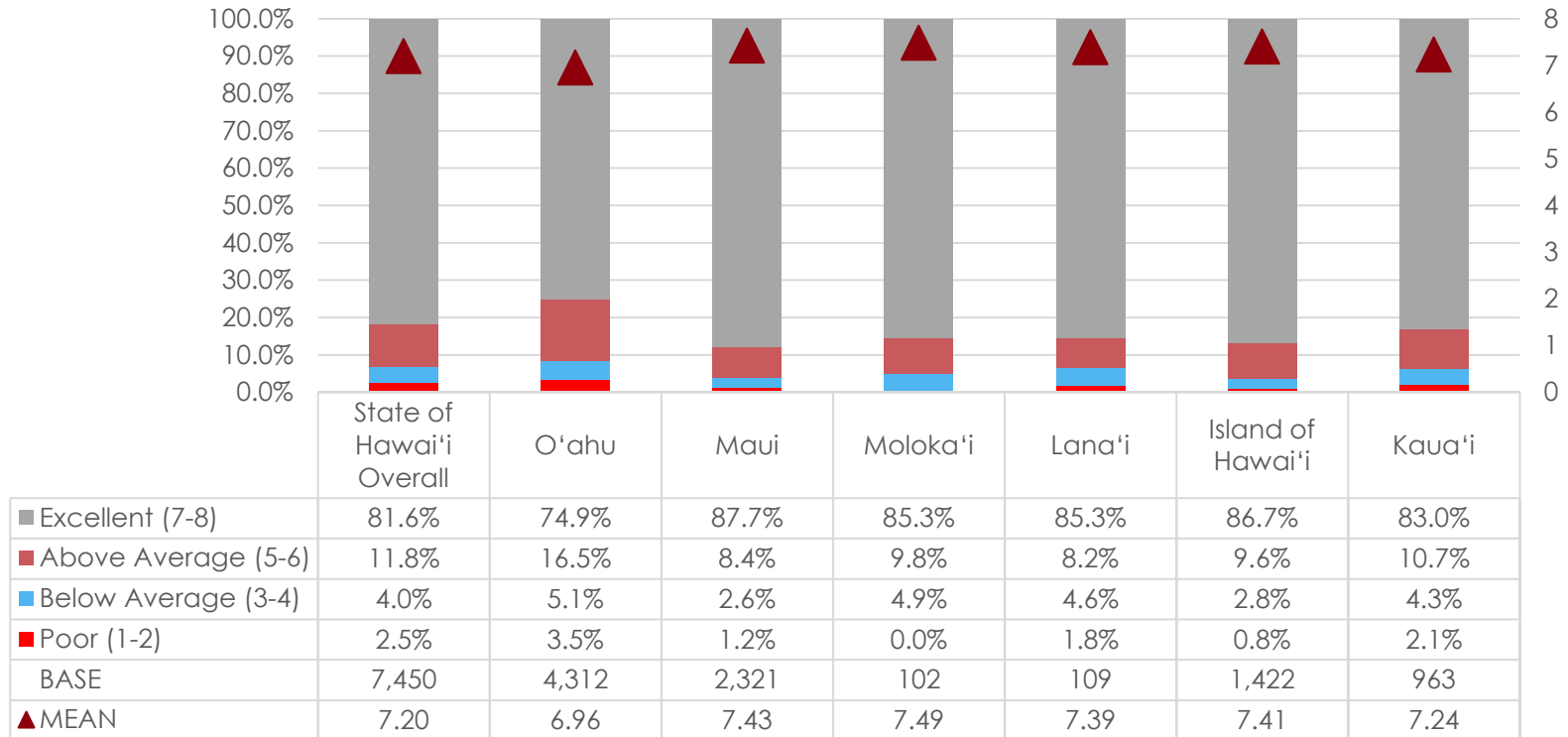
■ Do not nor plan to purchase	76.9%	75.3%	77.5%	77.7%	72.4%
■ Plan to in future	11.8%	13.2%	11.4%	10.9%	13.5%
■ Other Property Type	2.6%	2.7%	2.9%	2.7%	6.0%
■ Timeshare	8.7%	8.8%	8.2%	8.8%	8.1%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – U.S. EAST

# OVERALL SATISFACTION – MOST RECENT VISIT – U.S. EAST

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



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

# PRIMARY TRIP PURPOSE U.S. EAST

	2018	2019	2020
Vacation	55.8%	56.2%	54.1%
Visit friends/ relatives	9.3%	8.6%	26.0%
Other business	4.7%	4.7%	4.3%
Honeymoon	3.8%	3.9%	2.9%
Government/ military	0.5%	0.3%	2.6%
Anniversary/ birthday	9.0%	9.9%	2.2%
Convention, conference, seminar	4.1%	2.9%	1.3%
To get married	0.7%	0.9%	1.1%
Attend wedding/ vow renewal	2.8%	2.3%	0.5%
Vacation home/ timeshare	2.2%	2.0%	0.2%
Family gathering/ reunion	1.6%	2.0%	-

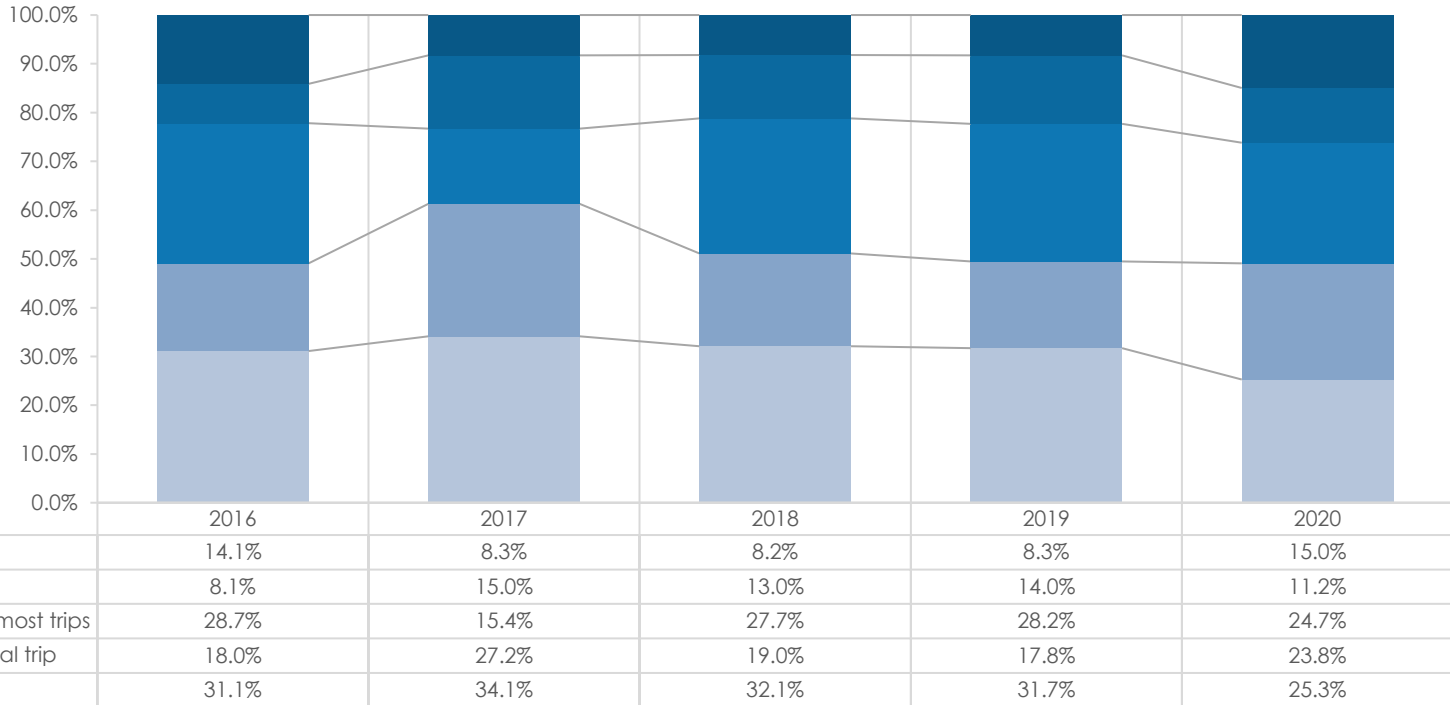


# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE

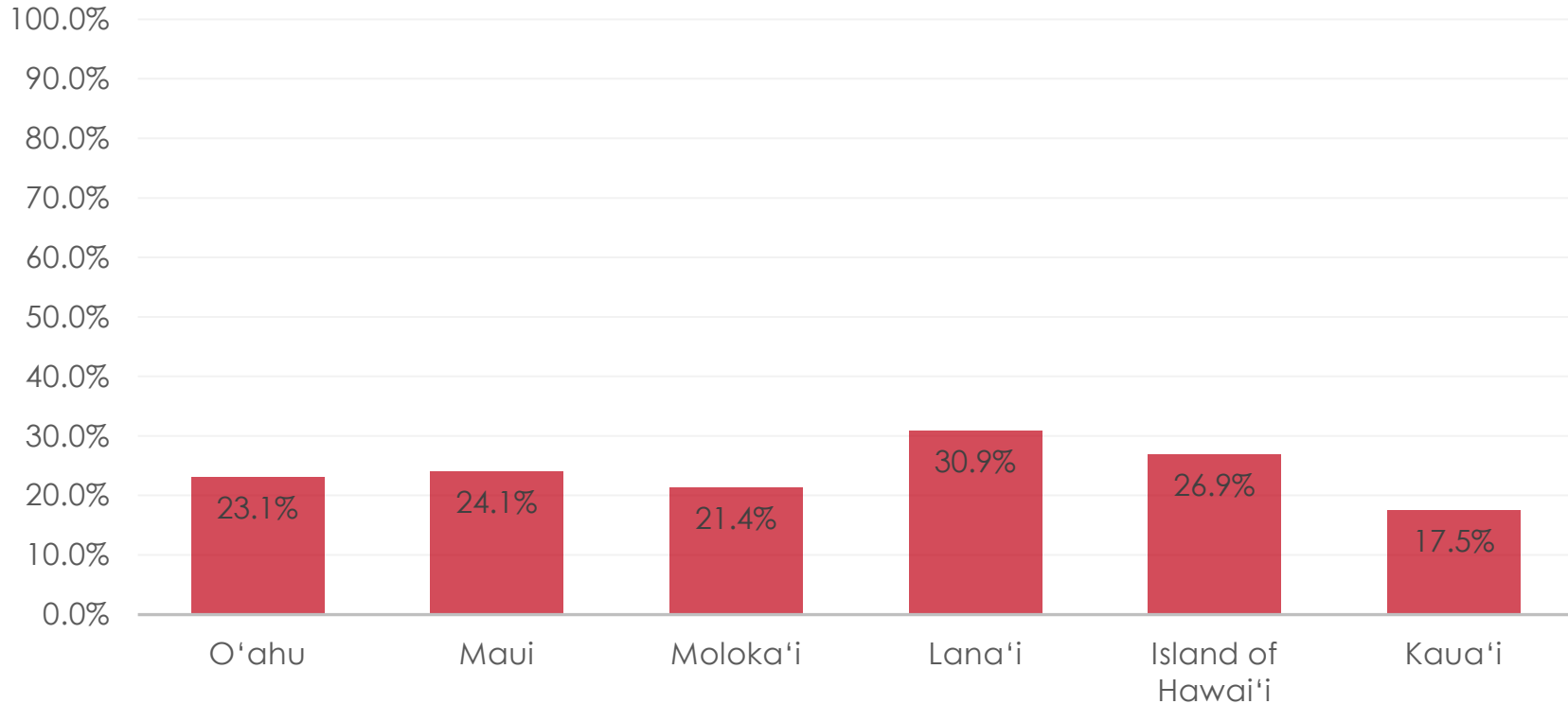
## U.S. EAST

	2018	2019	2020
Vacation	82.6%	82.2%	76.7%
Visit friends/ relatives	16.1%	15.6%	33.6%
Other business	6.1%	6.1%	6.2%
Honeymoon	4.5%	4.6%	3.9%
Anniversary/ birthday	16.0%	16.8%	3.7%
Government/ military	0.6%	0.5%	3.0%
Convention, conference, seminar	5.1%	3.6%	1.7%
Incentive trip	1.9%	2.6%	1.4%
Vacation home/ timeshare	4.8%	4.4%	0.3%
Family gathering/ reunion	5.2%	5.5%	-

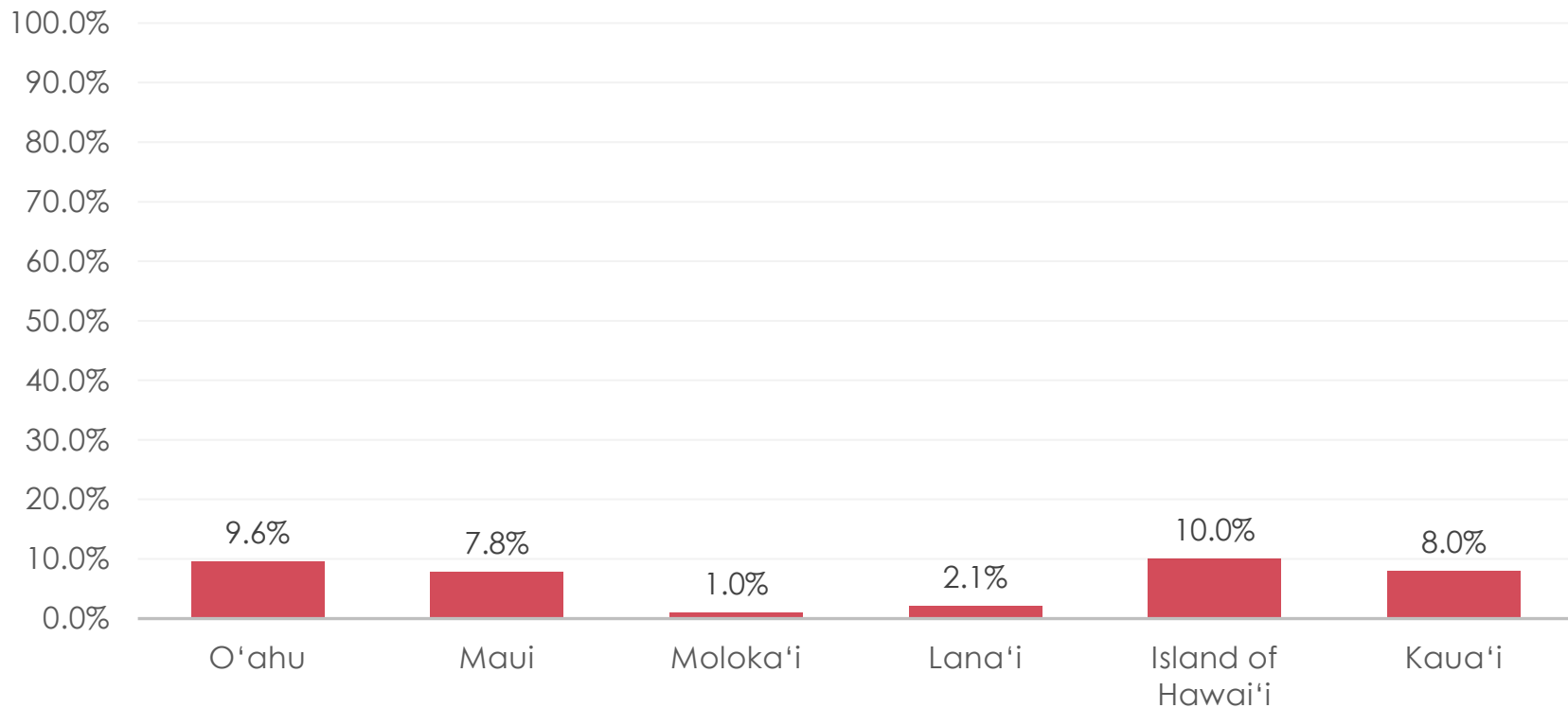
# VACATION TRIP DESCRIPTION – U.S. EAST



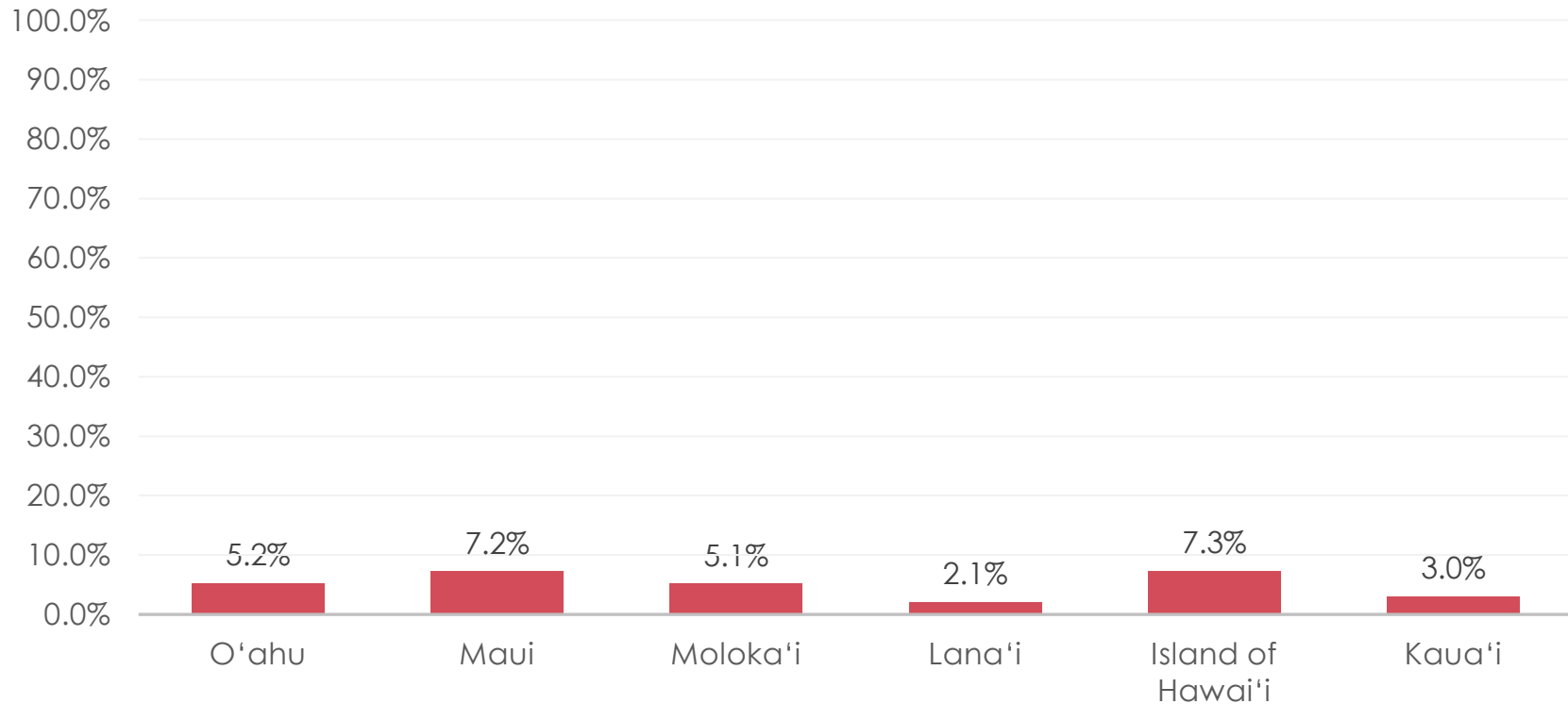
# ADVERTISING AWARENESS – U.S. EAST



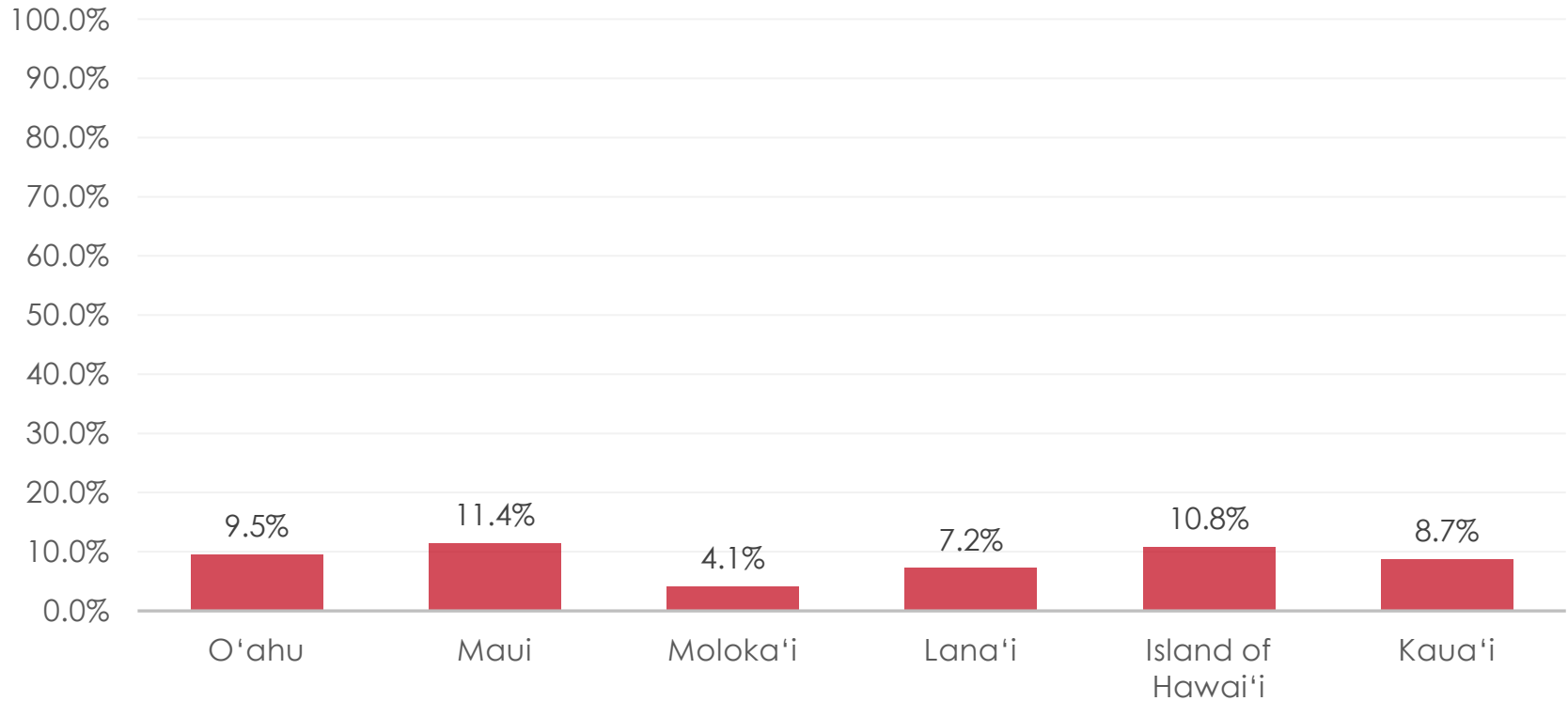
# IMPACT OF LOCATION FILMING – U.S. EAST



# IMPACT OF HAWAIIAN MUSIC – U.S. EAST

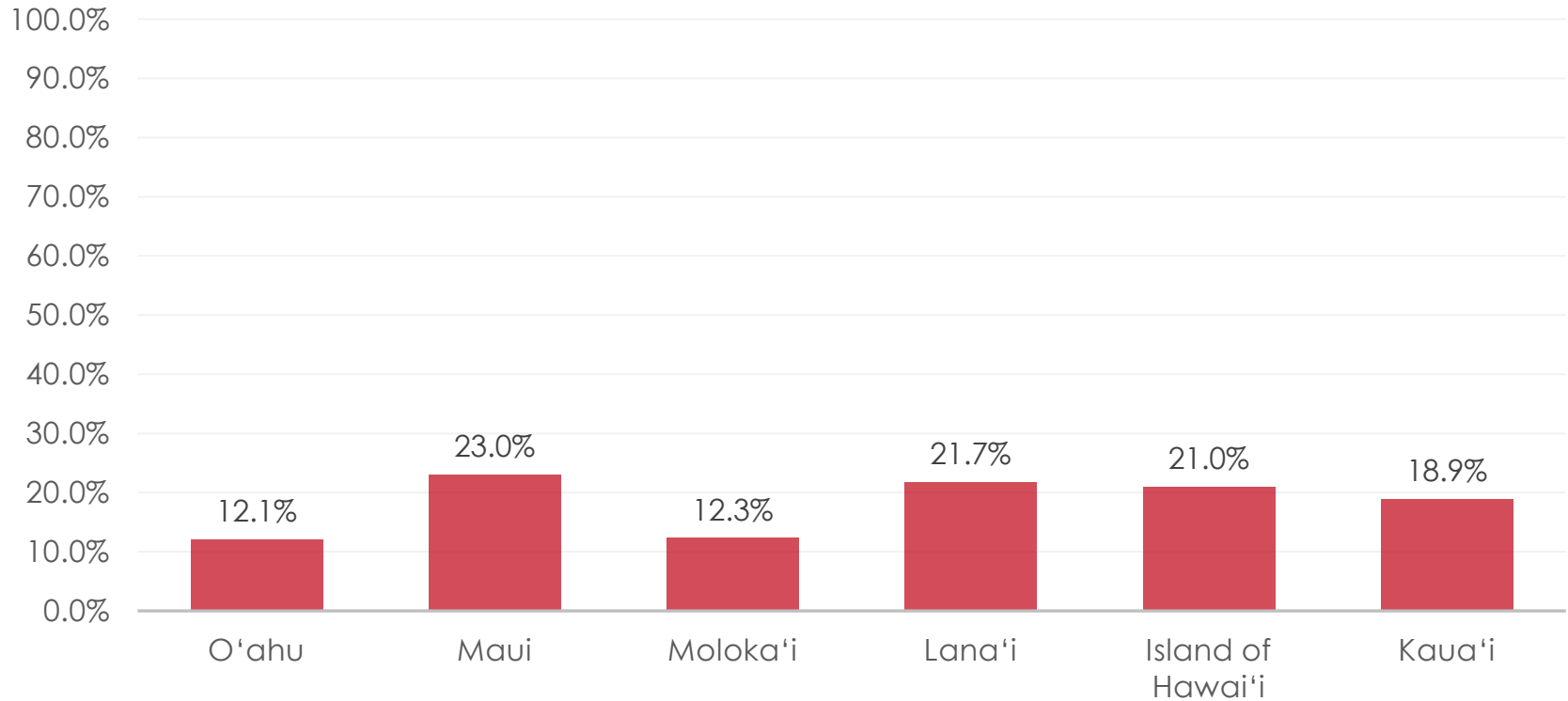


# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – U.S. EAST

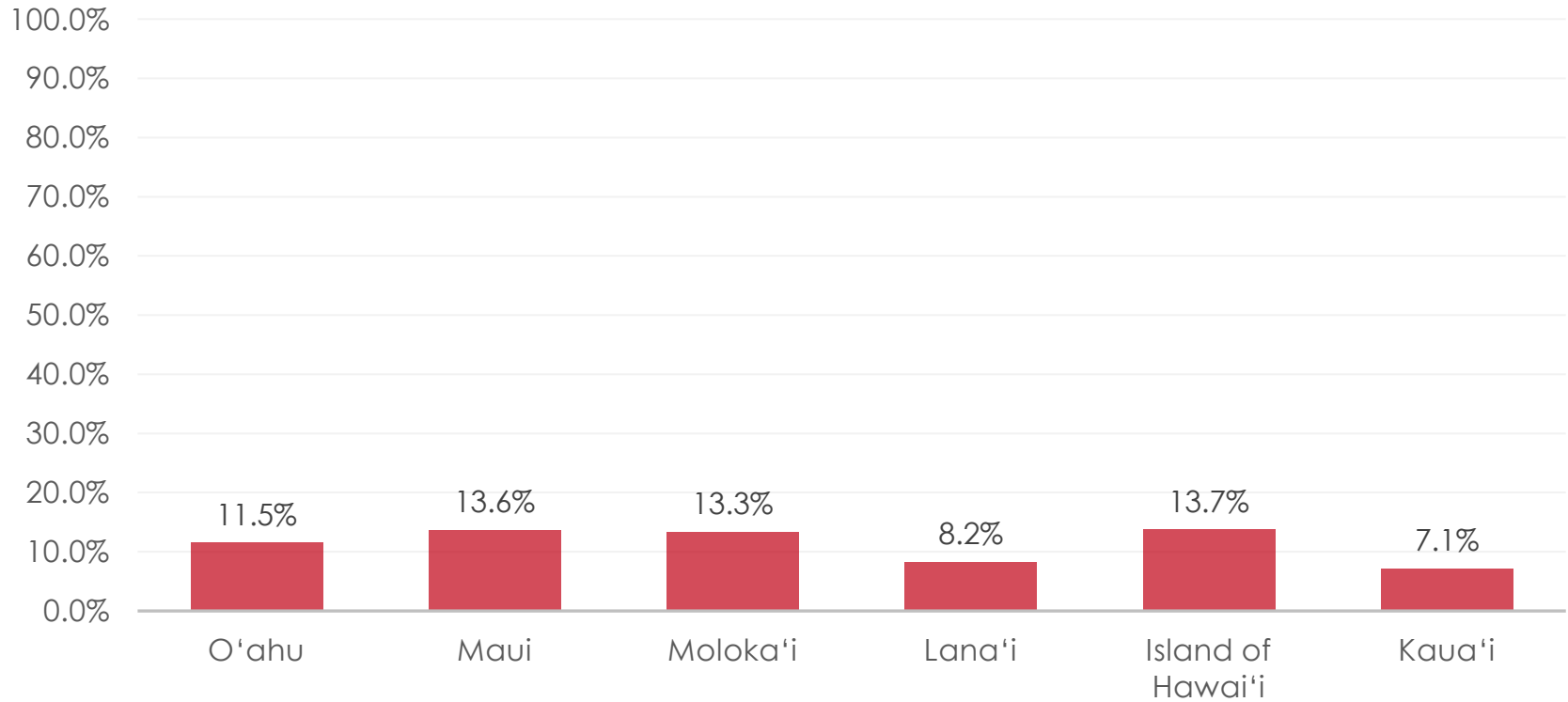


150 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF OUTDOOR/ SPORTING EVENT – U.S. EAST

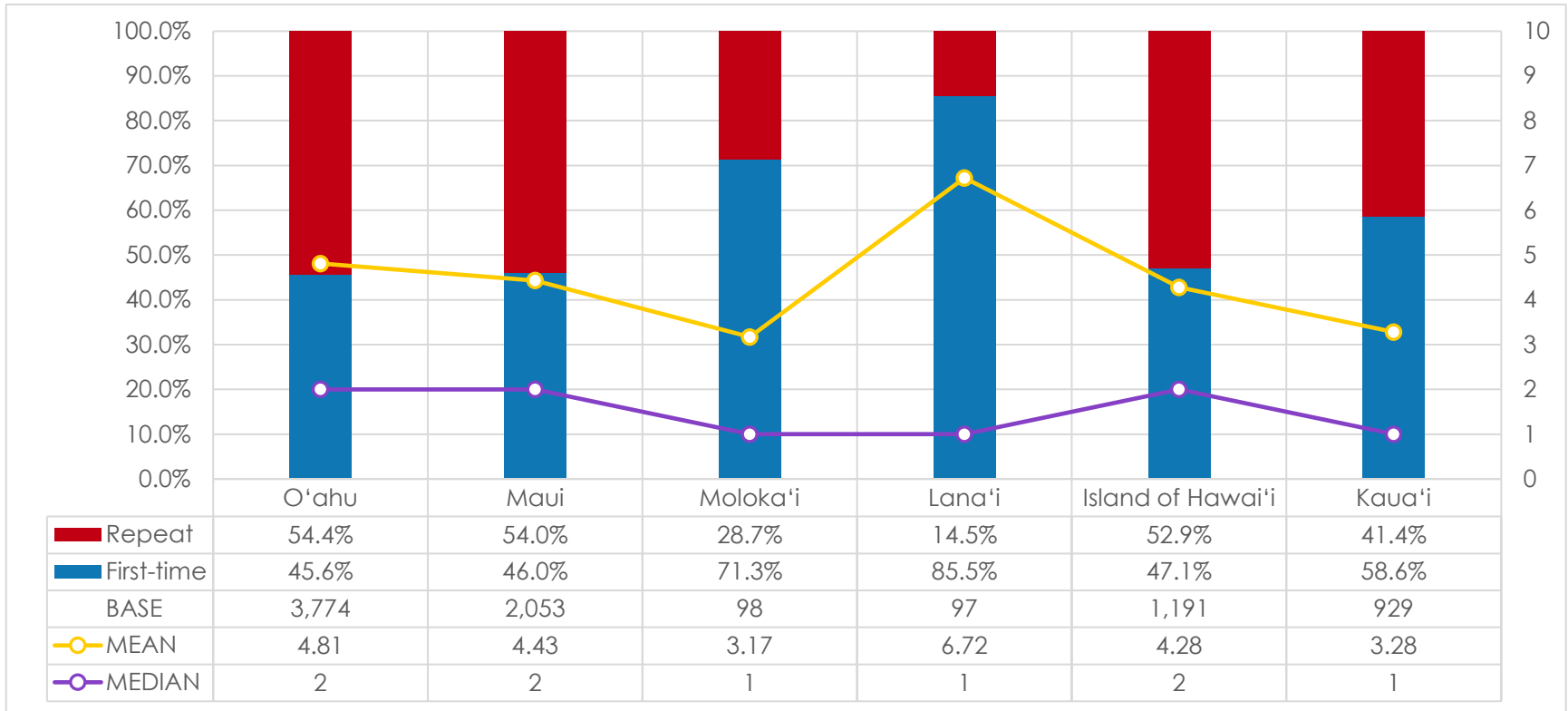


# IMPACT OF HAWAIIAN CULTURAL EVENTS – U.S. EAST





# 1<sup>ST</sup> TIME VS REPEAT VISITOR – U.S. EAST

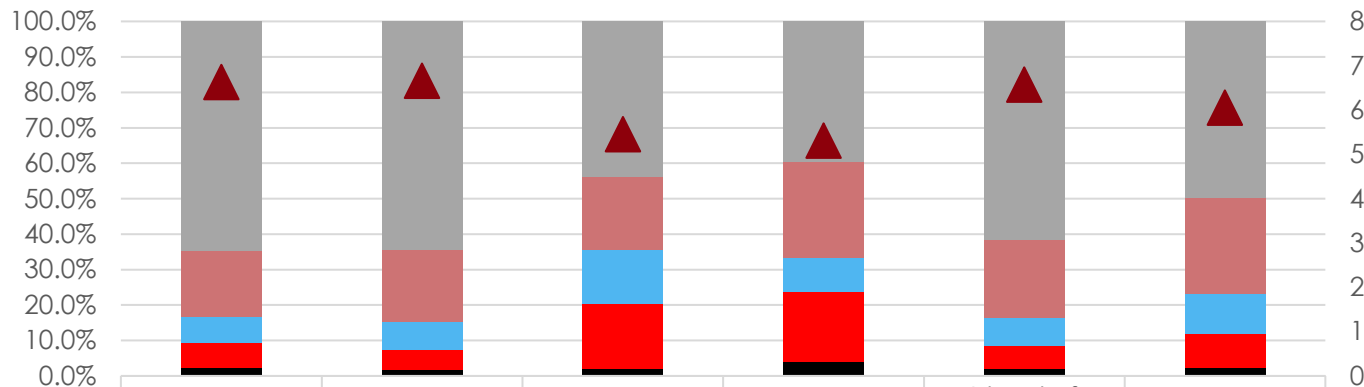


# TRAVEL PARTY MEMBERS – U.S. EAST

	2016	2017	2018	2019	2020
<b>Spouse</b>	62.9%	60.9%	61.0%	62.0%	48.1%
<b>Other adult family</b>	25.5%	24.6%	26.5%	27.6%	20.3%
<b>Child under 18</b>	18.1%	15.6%	19.5%	18.9%	14.9%
<b>Friends/ associates</b>	17.6%	14.9%	17.5%	16.6%	13.9%
<b>Alone</b>	11.5%	12.3%	10.3%	9.9%	22.2%
<b>Girlfriend/ boyfriend</b>	5.7%	6.5%	6.6%	6.2%	7.6%
<b>Same sex partner</b>	.8%	1.2%	1.2%	1.2%	1.0%

# LIKELIHOOD OF RETURN VISIT – U.S. EAST

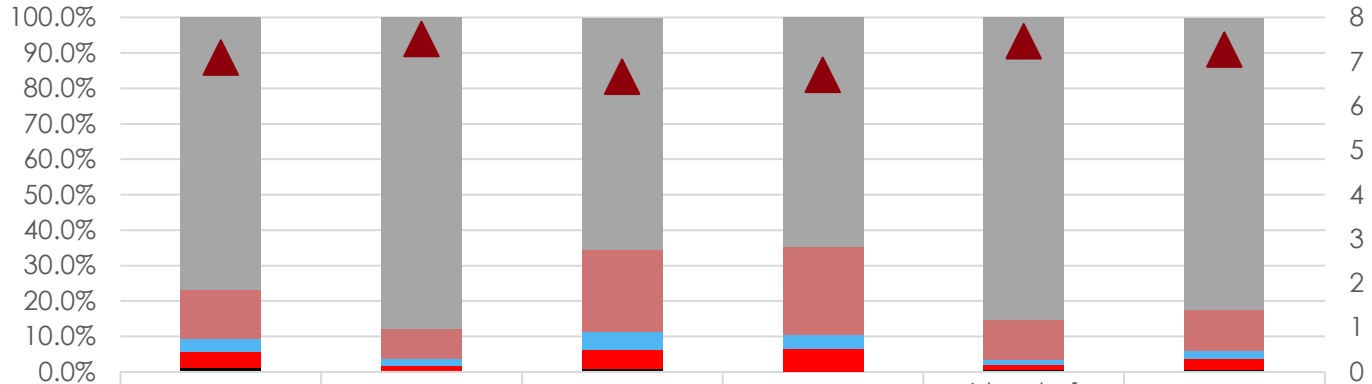
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	64.7%	64.6%	44.0%	39.6%	61.6%	50.0%
■ Somewhat likely (5-6)	18.6%	20.2%	20.4%	27.1%	22.0%	27.1%
■ Somewhat unlikely (3-4)	7.3%	8.2%	15.3%	9.4%	7.9%	11.0%
■ Very unlikely (1-2)	6.9%	5.5%	18.4%	19.7%	6.3%	9.7%
■ Not sure	2.4%	1.6%	2.0%	4.1%	2.2%	2.3%
BASE	3,768	2,052	98	96	1,190	929
▲ MEAN	6.63	6.66	5.45	5.31	6.57	6.05

# BRAND/DESTINATION ADVOCACY – U.S. EAST

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	77.0%	87.7%	65.3%	64.6%	85.4%	82.1%
■ Somewhat likely (5-6)	13.8%	8.5%	23.4%	25.0%	11.1%	11.8%
■ Somewhat unlikely (3-4)	3.6%	1.8%	5.1%	4.2%	1.6%	2.0%
■ Very unlikely (1-2)	4.5%	1.6%	5.1%	6.2%	1.3%	3.4%
■ Not sure	1.2%	0.3%	1.0%	0.0%	0.6%	0.5%
BASE	3,765	2,051	98	96	1,187	929
▲ MEAN	7.09	7.51	6.66	6.70	7.46	7.27

## ACTIVITIES – SIGHTSEEING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	90.6%	95.4%	97.9%	90.6%	95.3%	94.9%
<b>On own (self guided)</b>	77.4%	83.9%	78.2%	37.5%	86.3%	78.7%
<b>Helicopter/ airplane</b>	1.7%	3.9%	4.2%	2.1%	3.7%	9.9%
<b>Boat/ submarine/ whale</b>	14.4%	42.6%	12.5%	37.5%	24.8%	26.0%
<b>Visit towns</b>	38.7%	55.1%	54.2%	30.3%	53.9%	51.9%
<b>Limo/ van/ bus tour</b>	7.0%	6.9%	11.4%	9.4%	7.5%	9.4%
<b>Scenic views/ natural landmark</b>	54.0%	65.5%	59.4%	43.7%	63.8%	68.8%
<b>Movie/ TV/ film location</b>	7.9%	1.2%	0.0%	1.0%	1.3%	5.3%

# STATEWIDE – ACTIVITIES – SIGHTSEEING - U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	97.4%	96.5%	96.6%	93.0%
<b>On own (self guided)</b>	82.0%	81.8%	81.1%	81.3%
<b>Helicopter/ airplane</b>	13.2%	12.1%	11.4%	3.9%
<b>Boat/ submarine/ whale</b>	33.2%	31.1%	31.7%	26.0%
<b>Visit towns</b>	37.4%	57.0%	54.7%	47.9%
<b>Limo/ van/ bus tour</b>	19.9%	16.4%	16.9%	7.5%
<b>Scenic views/ natural landmark</b>	77.7%	69.9%	67.2%	60.7%
<b>Movie/ TV/ film location</b>	8.3%	7.0%	6.0%	5.1%

## ACTIVITIES – RECREATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	89.3%	96.6%	93.8%	90.7%	94.6%	92.8%
<b>Beach/ sunbathing</b>	77.9%	88.2%	70.9%	65.7%	77.7%	73.7%
<b>Bodyboard</b>	7.7%	9.5%	2.1%	1.0%	8.8%	7.1%
<b>Standup paddle board</b>	6.7%	6.6%	6.3%	0.0%	6.5%	3.3%
<b>Surfing</b>	9.2%	9.5%	1.0%	1.0%	4.5%	5.6%
<b>Canoeing/ kayak</b>	6.8%	5.0%	6.2%	0.0%	7.4%	10.7%
<b>Swim ocean</b>	57.2%	70.0%	32.3%	56.2%	60.7%	51.5%
<b>Snorkel</b>	27.7%	53.9%	25.0%	47.9%	47.2%	34.0%
<b>Freediving</b>	1.3%	2.7%	0.0%	1.0%	1.9%	1.2%
<b>Windsurf/ Kitesurf</b>	0.3%	0.6%	0.0%	0.0%	0.2%	0.0%
<b>Jet ski/ Parasail</b>	1.8%	1.7%	0.0%	1.0%	0.6%	0.0%
<b>Scuba</b>	2.7%	4.5%	2.1%	5.2%	4.5%	3.6%
<b>Fishing</b>	2.9%	2.9%	4.2%	6.3%	5.2%	2.7%
<b>Golf</b>	4.0%	10.3%	4.2%	15.6%	8.0%	10.5%

# STATEWIDE – ACTIVITIES – RECREATION – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	96.0%	96.2%	96.3%	92.9%
<b>Beach/ sunbathing</b>	84.8%	83.8%	83.0%	81.5%
<b>Bodyboard</b>	13.8%	11.3%	10.4%	8.7%
<b>Standup paddle board</b>	*	*	*	6.6%
<b>Surfing</b>	7.8%	6.5%	6.3%	8.5%
<b>Canoeing/ kayak</b>	9.1%	7.6%	7.4%	7.3%
<b>Swim ocean</b>	NA	65.1%	65.4%	62.3%
<b>Snorkel</b>	NA	42.9%	43.4%	39.8%
<b>Freediving</b>	NA	NA	NA	1.8%
<b>Windsurf/ Kitesurf</b>	0.4%	0.3%	0.3%	0.4%
<b>Jet ski/ Parasail</b>	3.0%	1.8%	1.8%	1.5%
<b>Scuba</b>	4.0%	3.2%	3.4%	3.8%
<b>Fishing</b>	2.9%	3.1%	3.5%	3.6%
<b>Golf</b>	6.7%	6.7%	6.4%	7.4%

\* Combined with bodyboarding



# ACTIVITIES – RECREATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	89.3%	96.6%	93.8%	90.7%	94.6%	92.8%
<b>Run/ Jog/ Fitness walk</b>	33.3%	37.8%	21.9%	12.5%	33.2%	30.5%
<b>Spa</b>	5.0%	8.4%	3.1%	15.6%	7.1%	6.1%
<b>Hiking</b>	44.5%	49.0%	48.9%	29.2%	55.5%	49.5%
<b>Backpack/Camping</b>	2.0%	2.1%	3.1%	1.0%	3.9%	3.5%
<b>Agritourism</b>	10.0%	8.3%	13.5%	6.3%	15.1%	8.5%
<b>Sport event/ tournament</b>	0.9%	1.3%	2.1%	0.0%	0.8%	0.2%
<b>Park/ botanical garden</b>	30.2%	33.7%	19.8%	9.4%	42.2%	37.7%
<b>Waterpark</b>	1.5%	0.5%	0.0%	0.0%	0.6%	0.5%
<b>Mountain tube/ waterfall rappel</b>	0.7%	1.1%	0.0%	0.0%	1.0%	3.9%
<b>Zip lining</b>	2.5%	3.0%	0.0%	1.0%	3.0%	3.2%
<b>Skydiving</b>	0.6%	0.0%	1.0%	1.0%	0.2%	0.1%
<b>All terrain vehicle (ATV)</b>	4.6%	1.9%	1.0%	4.2%	3.0%	4.7%
<b>Horseback riding</b>	1.8%	1.7%	0.0%	0.0%	2.6%	2.9%

# STATEWIDE – ACTIVITIES – RECREATION – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	96.0%	96.2%	96.3%	92.9%
<b>Run/ Jog/ Fitness walk</b>	36.3%	28.5%	24.5%	35.5%
<b>Spa</b>	11.6%	9.9%	10.0%	6.9%
<b>Hiking</b>	33.8%	36.0%	51.3%	49.1%
<b>Backpack/Camp</b>	*	*	2.3%	2.6%
<b>Agritourism</b>	13.1%	17.1%	16.1%	10.8%
<b>Sport event/ tournament</b>	2.3%	2.2%	2.9%	1.0%
<b>Park/ botanical garden</b>	47.6%	45.3%	43.0%	34.6%
<b>Waterpark</b>	NA	1.2%	1.3%	1.1%
<b>Mountain tube/ waterfall rappel</b>	NA	1.7%	2.1%	1.3%
<b>Zip lining</b>	NA	5.9%	5.6%	3.0%
<b>Skydiving</b>	NA	0.5%	0.6%	0.4%
<b>All terrain vehicle (ATV)</b>	NA	3.8%	3.5%	4.0%
<b>Horseback riding</b>	NA	2.3%	2.5%	2.1%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.6%	97.8%	93.8%	89.6%	97.5%	94.1%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	16.1%	26.4%	13.5%	41.7%	17.7%	20.6%
<b>Live music/ stage show</b>	13.9%	19.1%	23.9%	5.2%	17.7%	17.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	5.7%	6.1%	8.3%	0.0%	5.6%	5.3%
<b>Fine dining</b>	37.2%	55.2%	22.9%	36.4%	42.1%	44.1%
<b>Family restaurant</b>	49.7%	54.9%	44.8%	15.7%	55.6%	49.7%
<b>Fast food</b>	46.3%	31.7%	26.0%	6.2%	32.9%	29.1%
<b>Food truck</b>	40.0%	38.4%	14.6%	2.1%	18.2%	39.2%
<b>Café/ coffee house</b>	36.4%	40.2%	22.9%	12.5%	46.9%	39.4%
<b>Ethnic dining</b>	28.1%	23.7%	11.5%	9.4%	27.2%	21.9%
<b>Prepared own meal</b>	49.4%	58.0%	54.2%	14.6%	60.9%	50.3%

# STATEWIDE – ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	97.9%	97.7%	97.3%	96.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	33.2%	26.1%	26.2%	20.7%
<b>Live music/ stage show</b>	39.6%	37.3%	35.9%	17.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.6%	10.0%	9.1%	6.0%
<b>Fine dining</b>	58.2%	55.7%	53.8%	44.0%
<b>Family restaurant</b>	65.8%	58.3%	58.4%	52.7%
<b>Fast food</b>	34.9%	35.7%	35.2%	39.8%
<b>Food truck</b>	NA	31.2%	31.4%	37.3%
<b>Café/ coffee house</b>	44.8%	43.9%	43.1%	40.3%
<b>Ethnic dining</b>	36.1%	34.0%	34.3%	27.0%
<b>Prepared own meal</b>	40.6%	43.6%	42.2%	55.9%

## ACTIVITIES – SHOPPING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	89.1%	94.9%	86.5%	59.4%	94.3%	92.3%
<b>Mall/ department store</b>	44.9%	32.8%	4.2%	4.1%	21.1%	16.8%
<b>Designer boutique</b>	12.7%	18.7%	6.2%	4.2%	12.6%	16.0%
<b>Hotel/ resort store</b>	24.4%	28.5%	9.4%	14.6%	24.4%	17.6%
<b>Swap meet/ flea market</b>	13.6%	9.4%	8.3%	2.1%	10.3%	6.4%
<b>Discount/ outlet store</b>	13.9%	16.5%	2.1%	2.1%	10.2%	10.2%
<b>Supermarket</b>	53.1%	71.3%	53.2%	19.8%	69.9%	58.2%
<b>Farmer's market</b>	18.0%	25.7%	33.3%	4.2%	43.5%	32.3%
<b>Convenience store</b>	46.1%	46.2%	33.3%	11.5%	40.1%	38.0%
<b>Duty free store</b>	4.0%	1.8%	0.0%	0.0%	1.3%	1.2%
<b>Local shop/ artisan</b>	46.1%	65.3%	62.5%	33.3%	61.4%	68.3%

# STATEWIDE – ACTIVITIES – SHOPPING – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	95.9%	95.9%	95.4%	91.9%
<b>Mall/ department store</b>	44.3%	43.1%	40.4%	36.5%
<b>Designer boutique</b>	23.1%	18.6%	18.1%	15.3%
<b>Hotel/ resort store</b>	39.5%	39.2%	37.9%	25.5%
<b>Swap meet/ flea market</b>	18.2%	15.6%	14.8%	11.8%
<b>Discount/ outlet store</b>	19.1%	17.8%	16.2%	14.2%
<b>Supermarket</b>	51.4%	59.2%	58.6%	62.8%
<b>Farmer's market</b>	28.2%	31.2%	30.3%	26.9%
<b>Convenience store</b>	44.6%	48.1%	48.0%	45.4%
<b>Duty free store</b>	4.1%	4.6%	4.4%	2.8%
<b>Local shop/ artisan</b>	67.6%	67.0%	66.9%	56.7%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	61.0%	51.1%	62.5%	36.5%	60.7%	49.0%
<b>Historic military site</b>	41.4%	3.6%	2.1%	2.1%	9.3%	4.2%
<b>Other historical site</b>	19.5%	19.9%	47.9%	14.6%	38.4%	22.9%
<b>Museum/ art gallery</b>	10.3%	12.2%	6.2%	9.4%	11.6%	8.8%
<b>Luau/ Polynesian show/ hula show</b>	13.9%	16.5%	10.4%	10.4%	16.7%	16.3%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	3.7%	3.4%	3.1%	2.1%	3.9%	2.7%
<b>Play/ concert/ theatre</b>	1.9%	1.4%	4.2%	1.0%	1.4%	1.7%
<b>Art/ craft fair</b>	4.1%	9.5%	4.2%	1.0%	9.6%	6.9%
<b>Festival event</b>	5.0%	4.5%	8.4%	6.3%	3.3%	4.1%

## STATEWIDE – ACTIVITIES – HISTORY, CULTURE, FINE ARTS – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	81.3%	77.1%	75.6%	57.8%
<b>Historic military site</b>	42.9%	28.3%	27.2%	23.4%
<b>Other historical site</b>	34.7%	31.4%	31.1%	23.9%
<b>Museum/ art gallery</b>	21.9%	18.3%	17.2%	11.3%
<b>Luau/ Polynesian show/ hula show</b>	47.6%	42.0%	41.3%	16.1%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	6.3%	8.5%	8.1%	3.8%
<b>Play/ concert/ theatre</b>	4.7%	5.1%	4.3%	1.8%
<b>Art/ craft fair</b>	12.8%	13.5%	11.9%	7.0%
<b>Festival event</b>	9.8%	5.3%	5.2%	5.0%



## ACTIVITIES – TRANSPORTATION – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	74.0%	90.8%	79.2%	61.5%	86.9%	91.3%
<b>Airport shuttle</b>	10.7%	5.6%	7.3%	19.8%	10.4%	13.1%
<b>Trolley</b>	1.2%	3.1%	1.0%	0.0%	1.2%	1.0%
<b>Public bus</b>	5.4%	1.7%	1.0%	1.0%	0.8%	1.2%
<b>Tour bus/ tour van</b>	7.2%	6.6%	13.5%	20.8%	6.8%	13.3%
<b>Taxi/ limo</b>	8.1%	5.6%	7.3%	9.3%	5.9%	4.1%
<b>Rental car</b>	51.6%	81.7%	61.5%	19.8%	78.3%	75.9%
<b>Ride share</b>	22.8%	11.5%	1.0%	2.1%	8.7%	5.7%
<b>Bicycle rental</b>	2.6%	2.5%	0.0%	0.0%	0.9%	3.2%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – U.S. EAST

	2017	2018	2019	2020
<b>TOTAL</b>	95.0%	92.4%	93.2%	81.2%
<b>Airport shuttle</b>	26.3%	20.2%	17.6%	10.2%
<b>Trolley</b>	4.5%	3.4%	3.7%	1.7%
<b>Public bus</b>	7.5%	5.7%	4.8%	3.4%
<b>Tour bus/ tour van</b>	20.6%	18.0%	18.6%	7.8%
<b>Taxi/ limo</b>	20.1%	12.4%	10.0%	7.1%
<b>Rental car</b>	75.3%	74.2%	74.4%	66.1%
<b>Ride share</b>	NA	14.9%	18.3%	16.5%
<b>Bicycle rental</b>	NA	2.2%	2.3%	2.5%

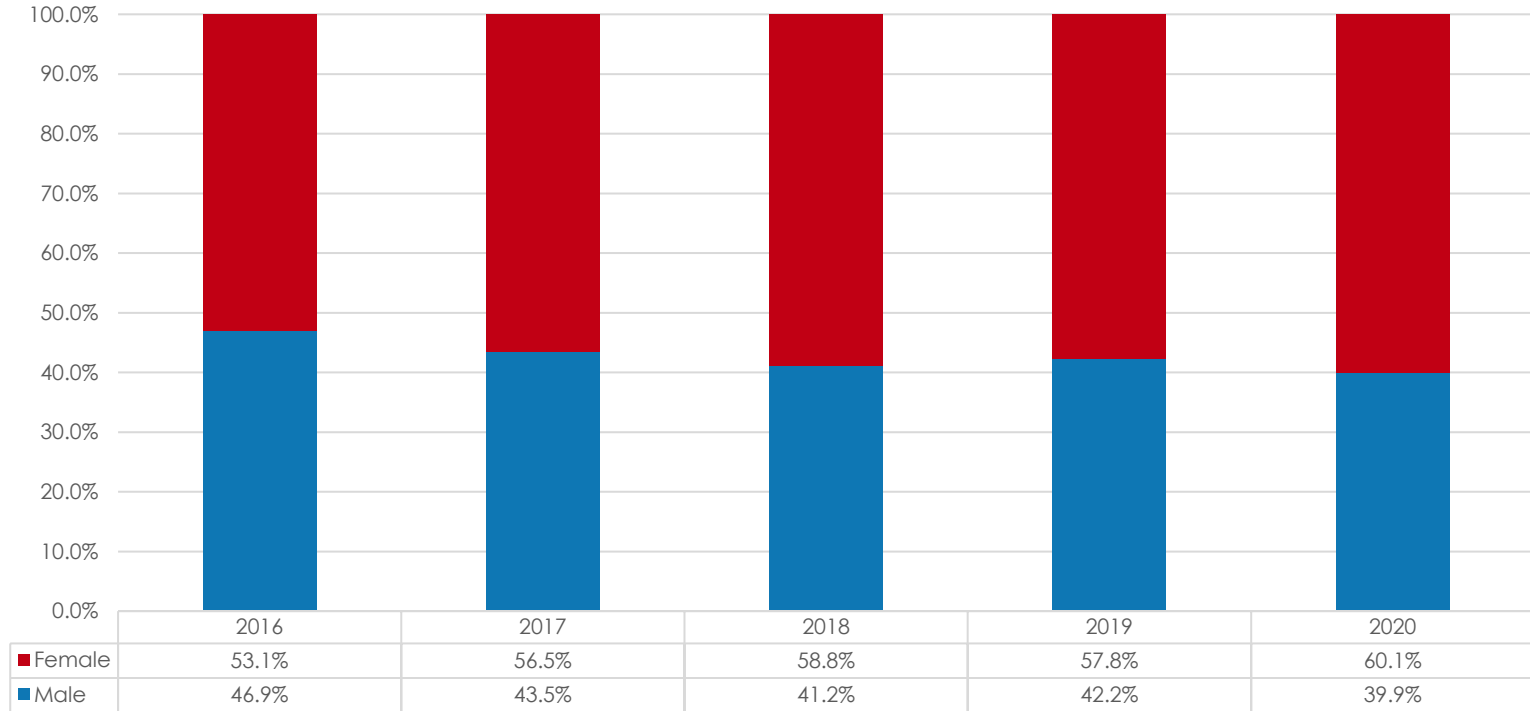
## ACTIVITIES – OTHER – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	51.4%	22.9%	28.2%	7.3%	33.9%	19.7%
<b>Visit friends/ family</b>	50.8%	22.5%	28.2%	6.2%	33.3%	18.2%
<b>Volunteer non profit</b>	1.0%	0.9%	0.0%	2.1%	1.1%	1.9%

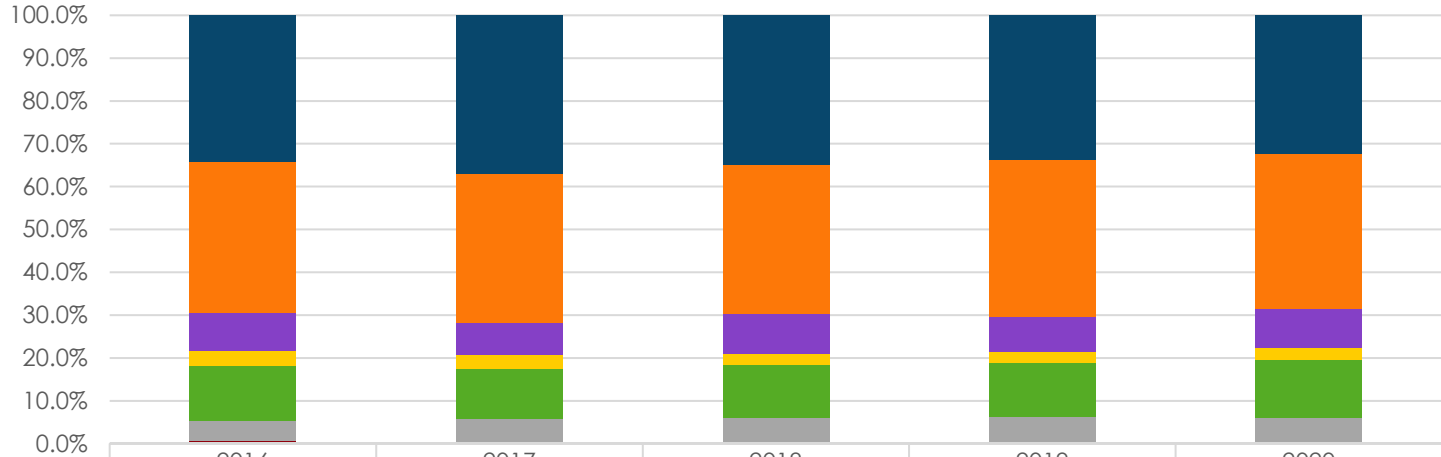
## ACTIVITIES – OTHER – U.S. EAST

	2018	2019	2020
TOTAL	26.4%	25.2%	39.8%
Visit friends/ family	25.6%	24.4%	39.2%
Volunteer non profit	1.3%	1.1%	1.1%

# VISITOR PROFILE – GENDER – U.S. EAST

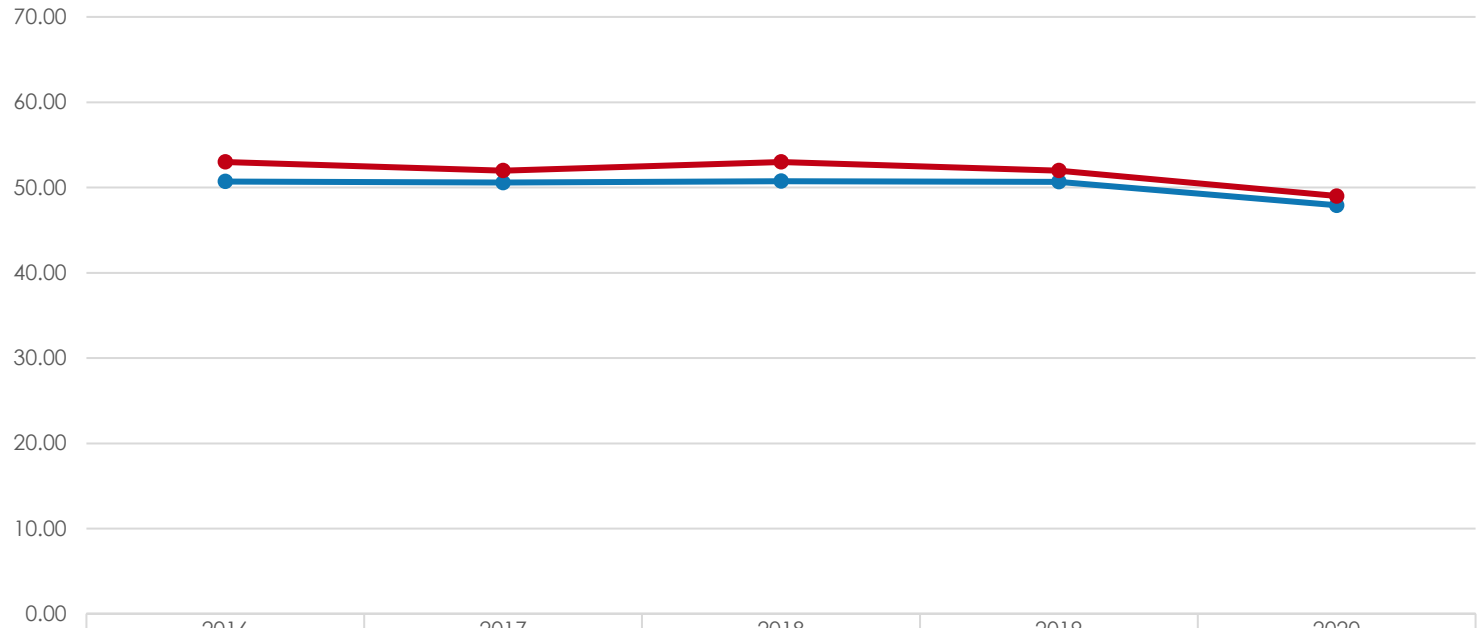


# VISITOR PROFILE – EDUCATION – U.S. EAST



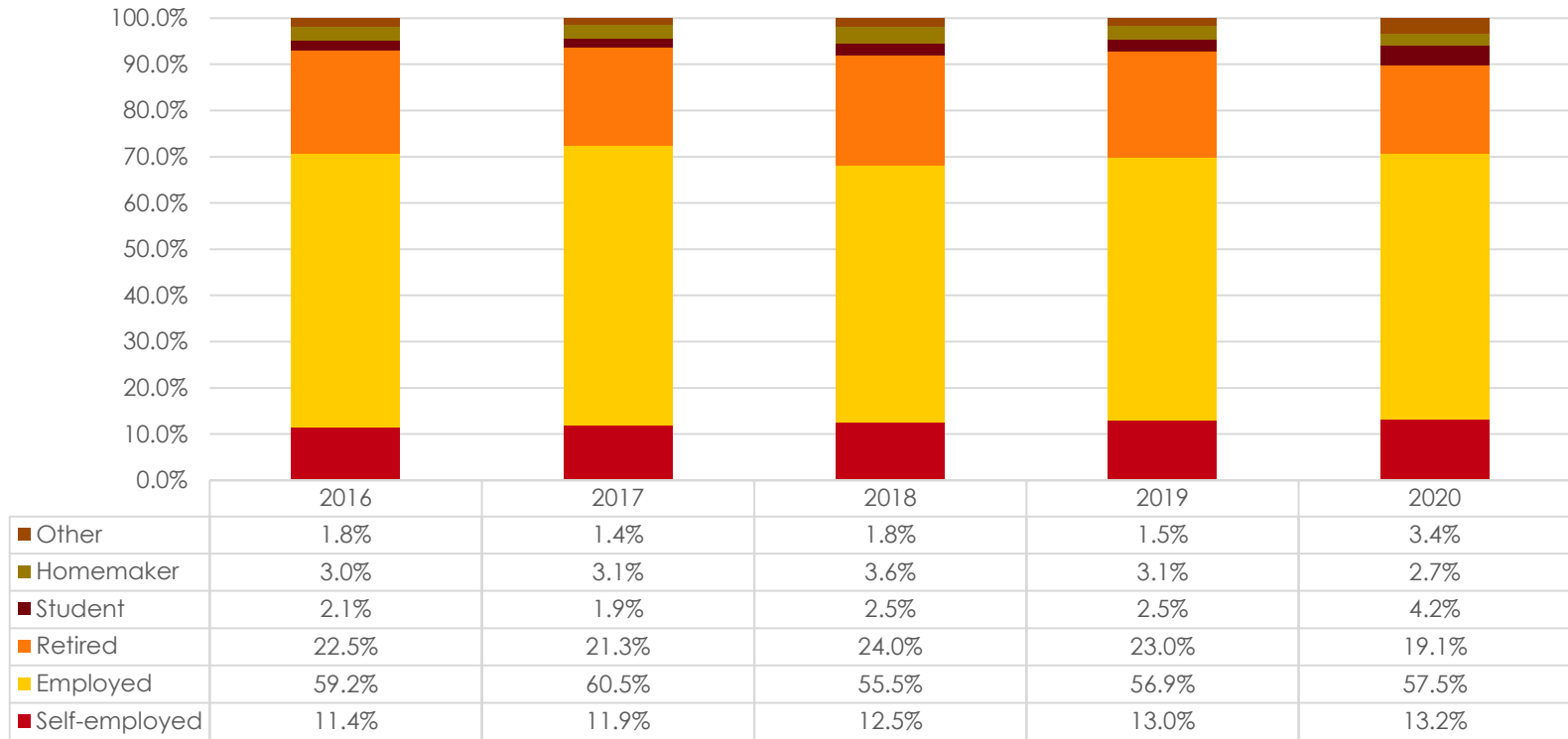
	2016	2017	2018	2019	2020
Post-Graduate	34.2%	37.1%	34.8%	33.8%	32.4%
College Grad	35.3%	34.8%	34.9%	36.4%	36.4%
Associate Degree	8.8%	7.6%	9.2%	8.3%	8.9%
Vocational/ Tech	3.6%	3.2%	2.8%	2.7%	3.0%
Some College	12.7%	11.6%	12.2%	12.4%	13.4%
H.S. Grad	4.8%	5.3%	5.6%	5.9%	5.5%
Some / No H.S.	0.6%	0.5%	0.5%	0.5%	0.5%

# VISITOR PROFILE – AGE – U.S. EAST



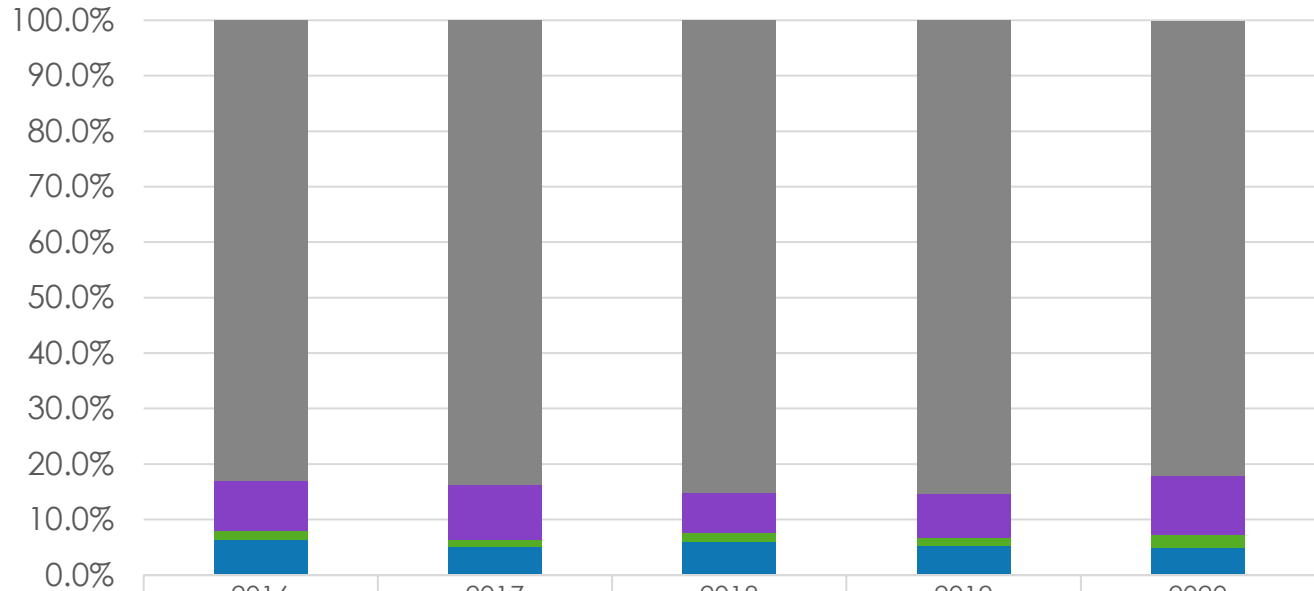
	2016	2017	2018	2019	2020
MEAN	50.71	50.58	50.75	50.68	47.92
MEDIAN	53.00	52.00	53.00	52.00	49.00

# VISITOR PROFILE – EMPLOYMENT STATUS – U.S. EAST





# VISITOR PROFILE – HAWAII PROPERTY OWNER – U.S. EAST



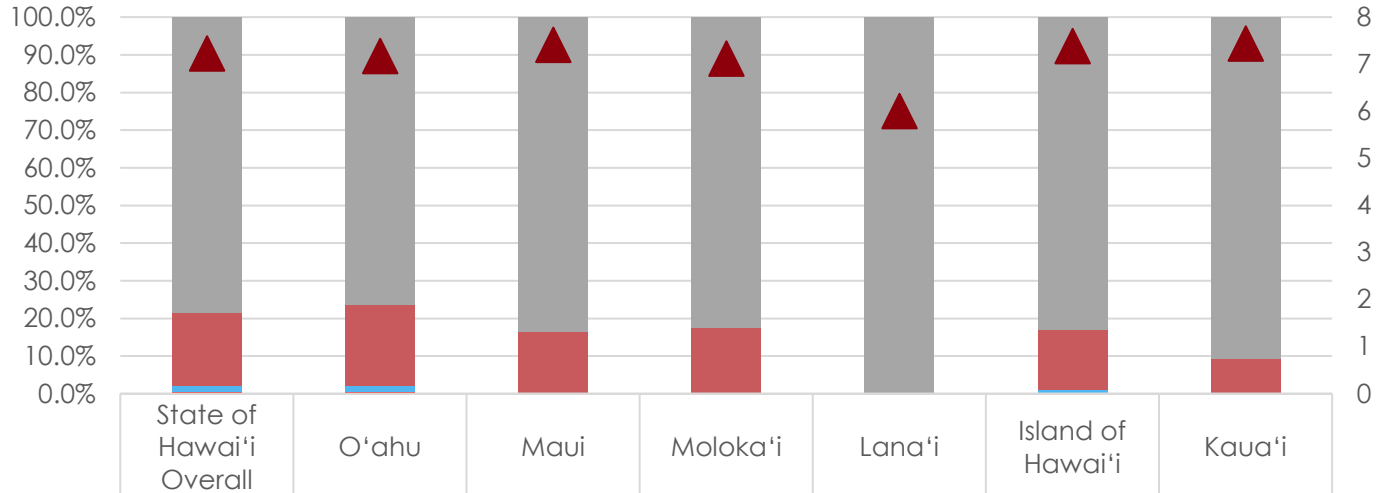
■ Do not nor plan to purchase	83.0%	83.8%	85.1%	85.3%	81.9%
■ Plan to in future	9.0%	9.9%	7.3%	8.0%	10.7%
■ Other Property Type	1.7%	1.3%	1.6%	1.5%	2.4%
■ Timeshare	6.3%	5.1%	6.0%	5.2%	4.9%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – JAPAN

# OVERALL SATISFACTION – MOST RECENT VISIT – JAPAN

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



■ Excellent (7-8)	78.5%	76.3%	83.5%	82.3%	100.0%	83.0%	90.6%
■ Above Average (5-6)	19.5%	21.6%	16.5%	17.7%	0.0%	15.9%	9.4%
■ Below Average (3-4)	1.6%	1.6%	0.0%	0.0%	0.0%	0.8%	0.0%
■ Poor (1-2)	0.5%	0.6%	0.0%	0.0%	0.0%	0.3%	0.0%
BASE	2,209	1,913	34	6	1	408	13
▲ MEAN	7.23	7.17	7.41	7.12	6.00	7.38	7.44

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

# PRIMARY TRIP PURPOSE JAPAN

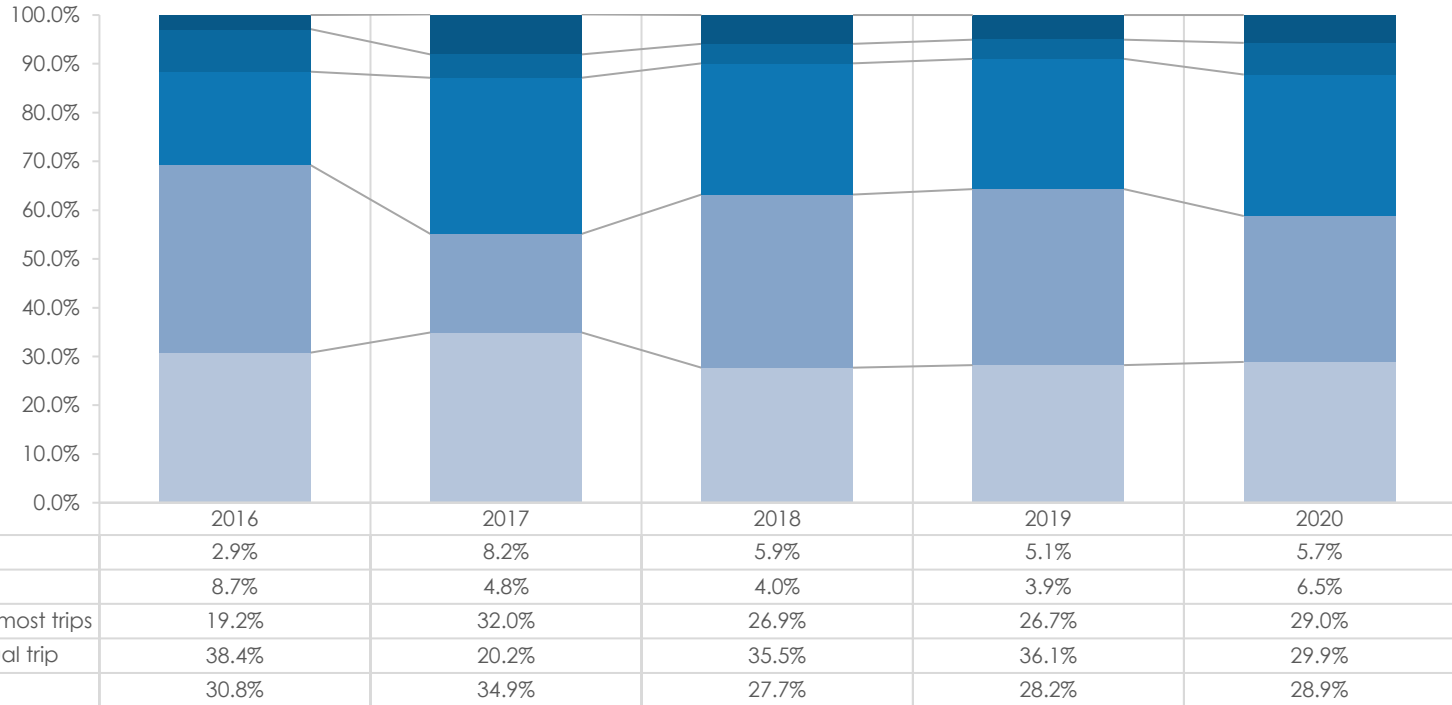
	2018	2019	2020
<b>Vacation</b>	65.4%	68.1%	68.8%
<b>Honeymoon</b>	10.2%	10.1%	14.0%
<b>Incentive trip</b>	0.9%	1.0%	3.7%
<b>Get married</b>	2.6%	2.4%	2.8%
<b>Visit friends/ family</b>	1.2%	1.0%	2.1%
<b>Other business</b>	2.4%	2.3%	1.5%
<b>Attend wedding/ vow renewal</b>	4.5%	3.7%	1.3%
<b>Vacation home/ timeshare</b>	1.9%	2.3%	0.0%
<b>Anniversary/ birthday</b>	3.6%	2.1%	0.4%

# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE JAPAN

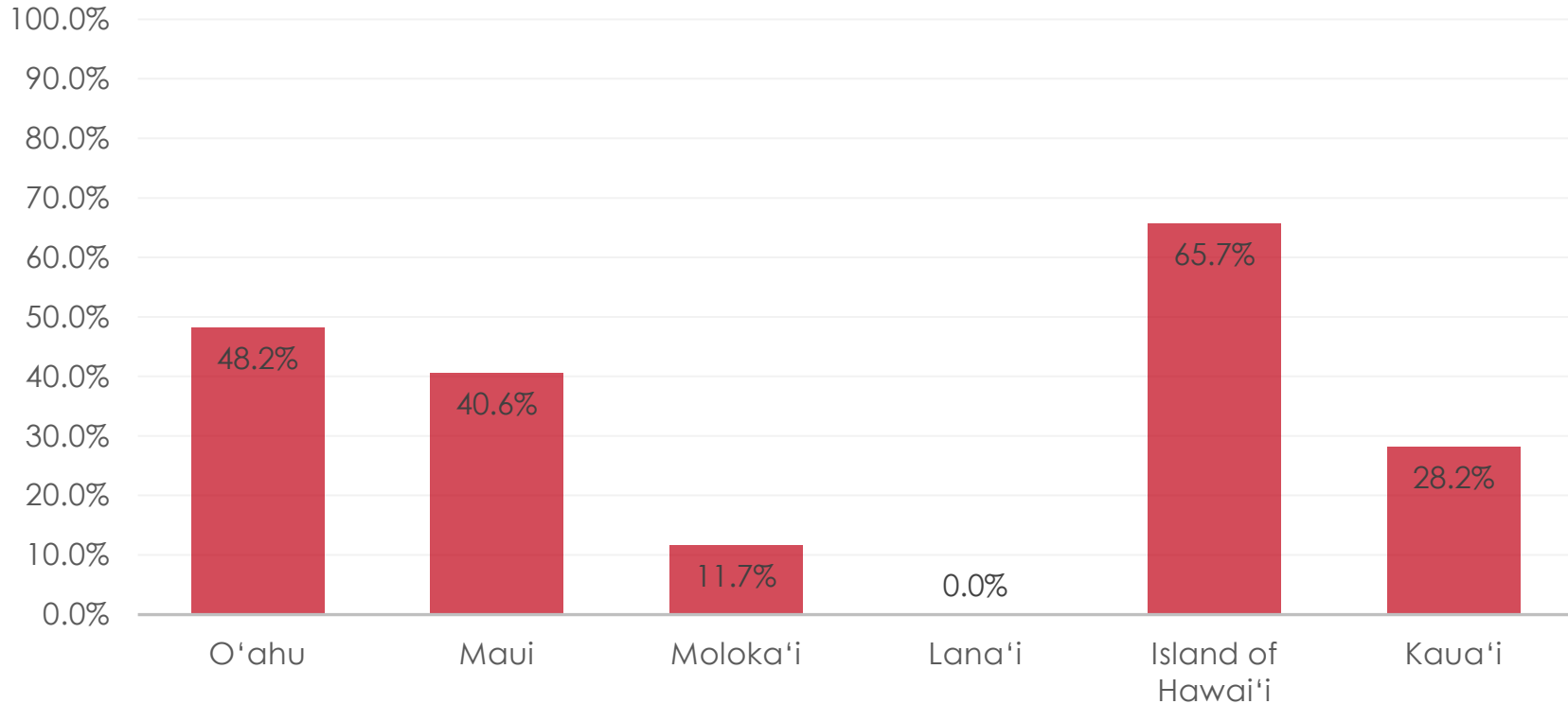
	2018	2019	2020
Vacation	86.0%	87.7%	82.3%
Honeymoon	12.9%	12.5%	16.1%
Incentive trip	2.0%	2.1%	7.6%
Visit friends/ relatives	4.7%	3.6%	5.7%
Get married	3.5%	3.3%	4.6%
Shopping/ fashion	26.3%	24.3%	0.4%
Anniversary/ birthday	7.2%	6.1%	0.6%
Vacation home/ timeshare	4.8%	5.3%	0.0%
Attend wedding/ vow renewal	5.2%	4.1%	1.3%
Family gathering/ reunion	4.4%	4.0%	0.1%
Other business	3.3%	3.2%	2.1%

181 Q What was the primary purpose of your most recent trip to the state of Hawai'i\_\_\_?  
Q, What, if any, was the secondary purpose of your most recent visit?

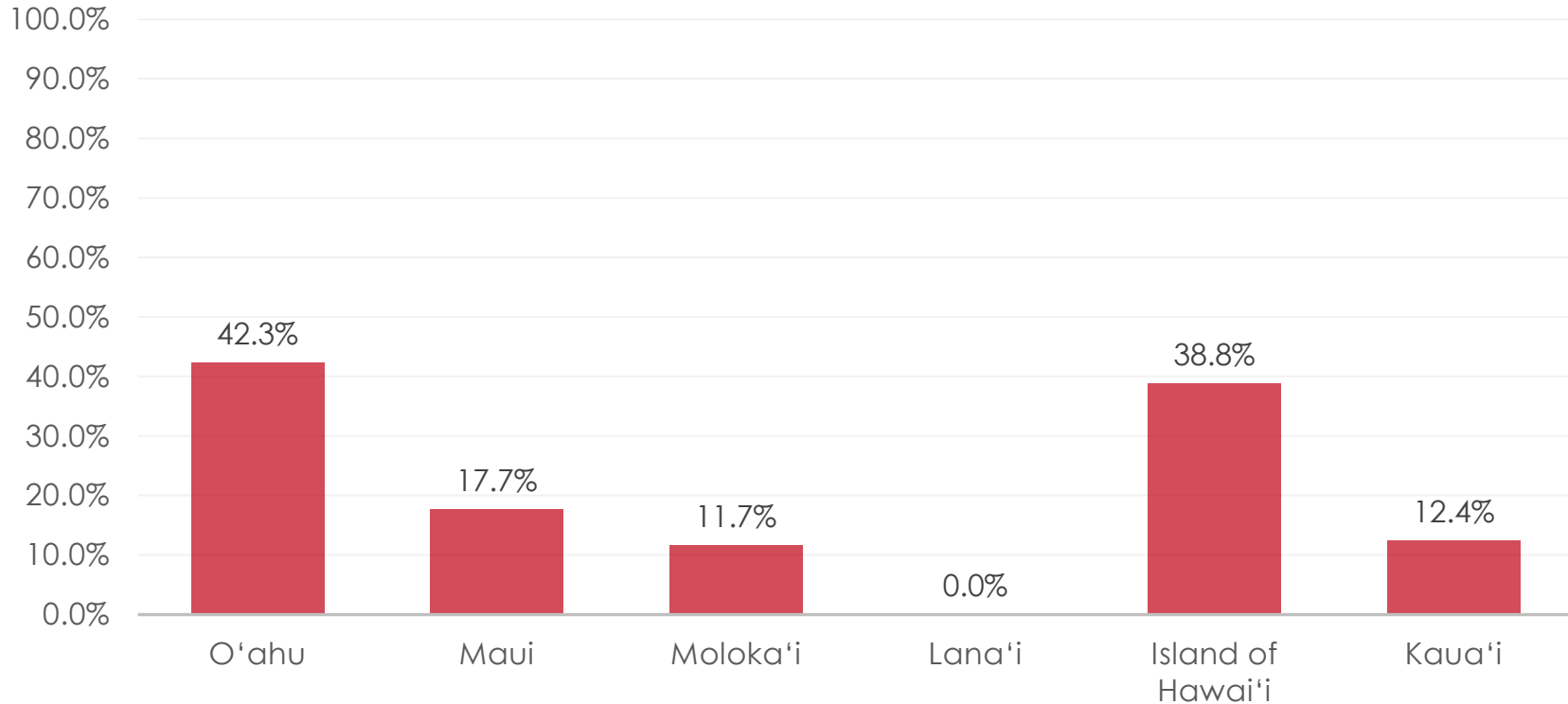
# VACATION TRIP DESCRIPTION – JAPAN



# ADVERTISING AWARENESS – JAPAN

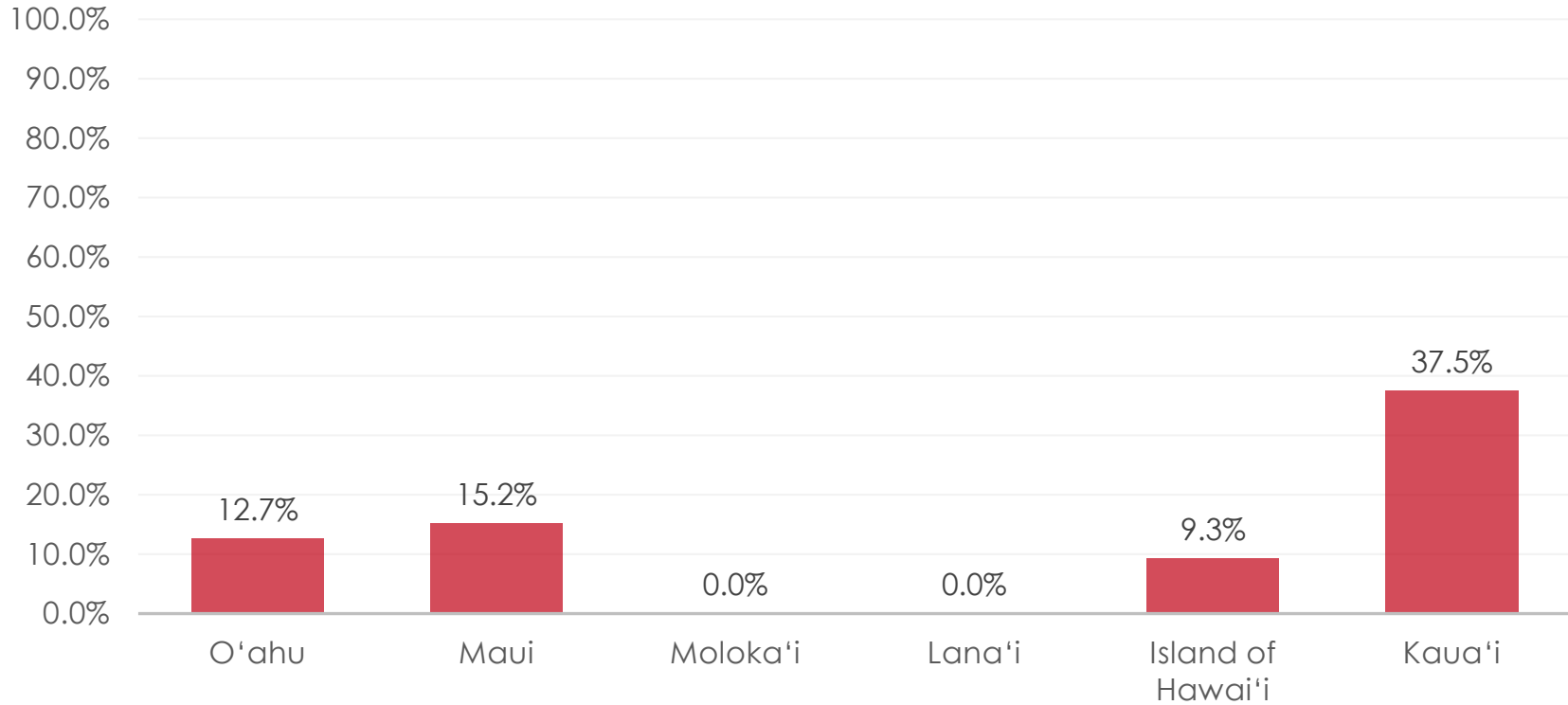


# IMPACT OF LOCATION FILMING – JAPAN

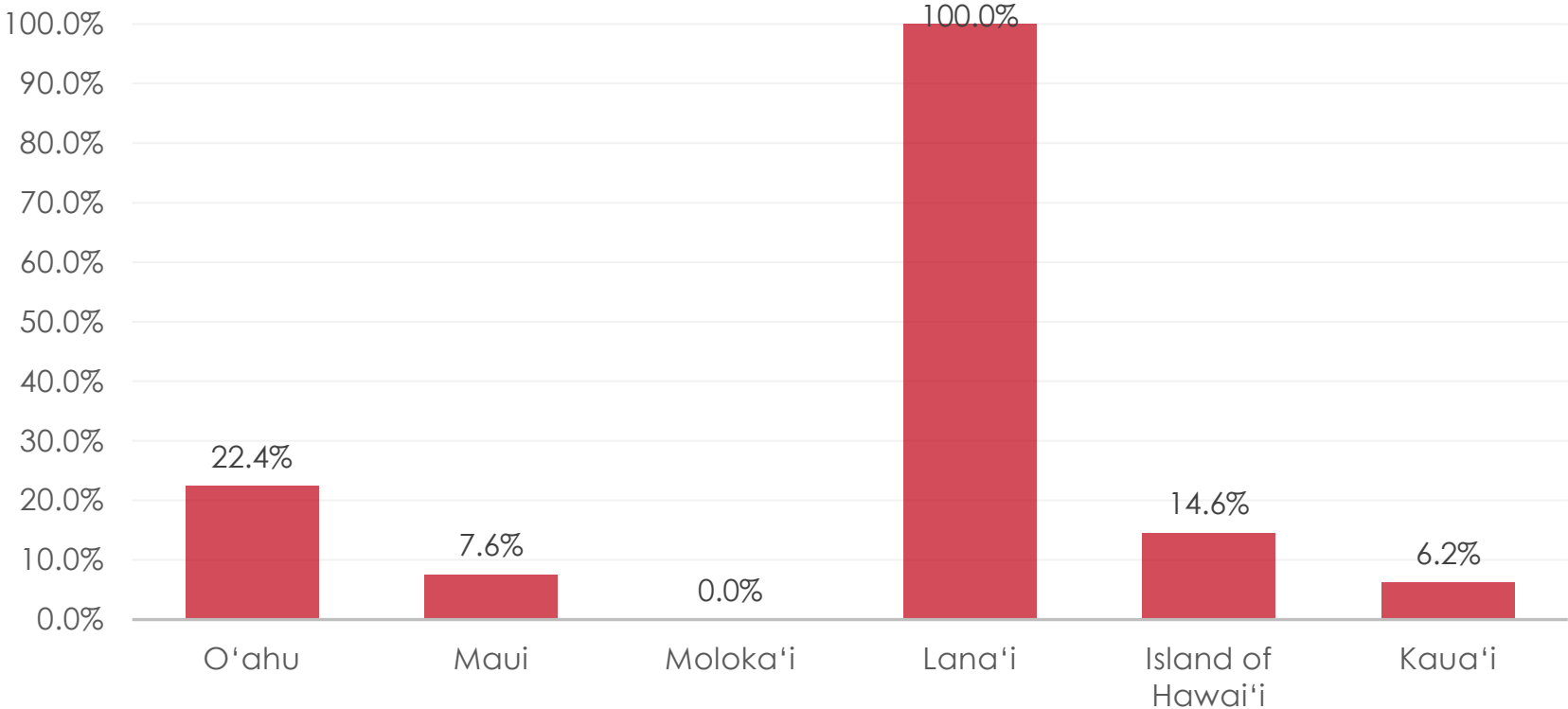




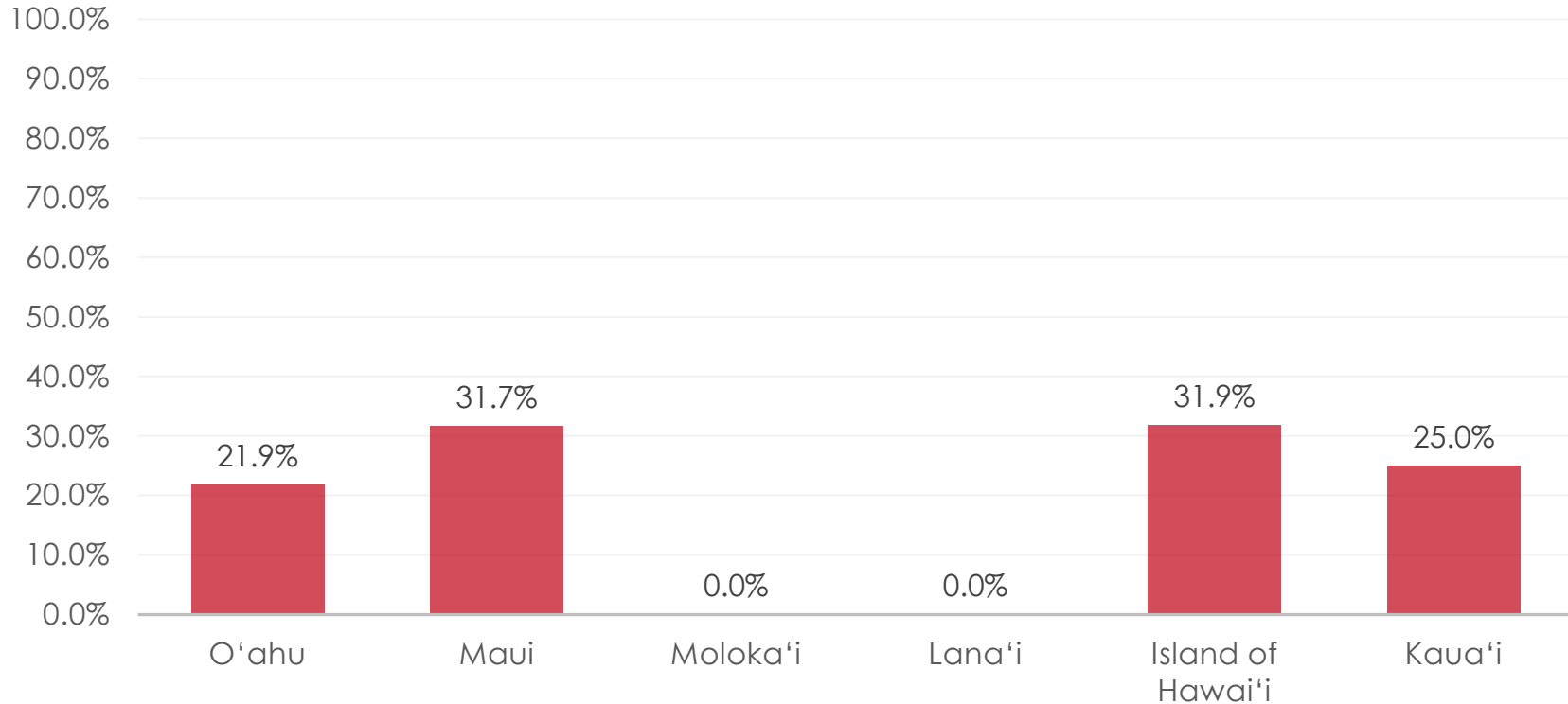
# IMPACT OF HAWAIIAN MUSIC – JAPAN



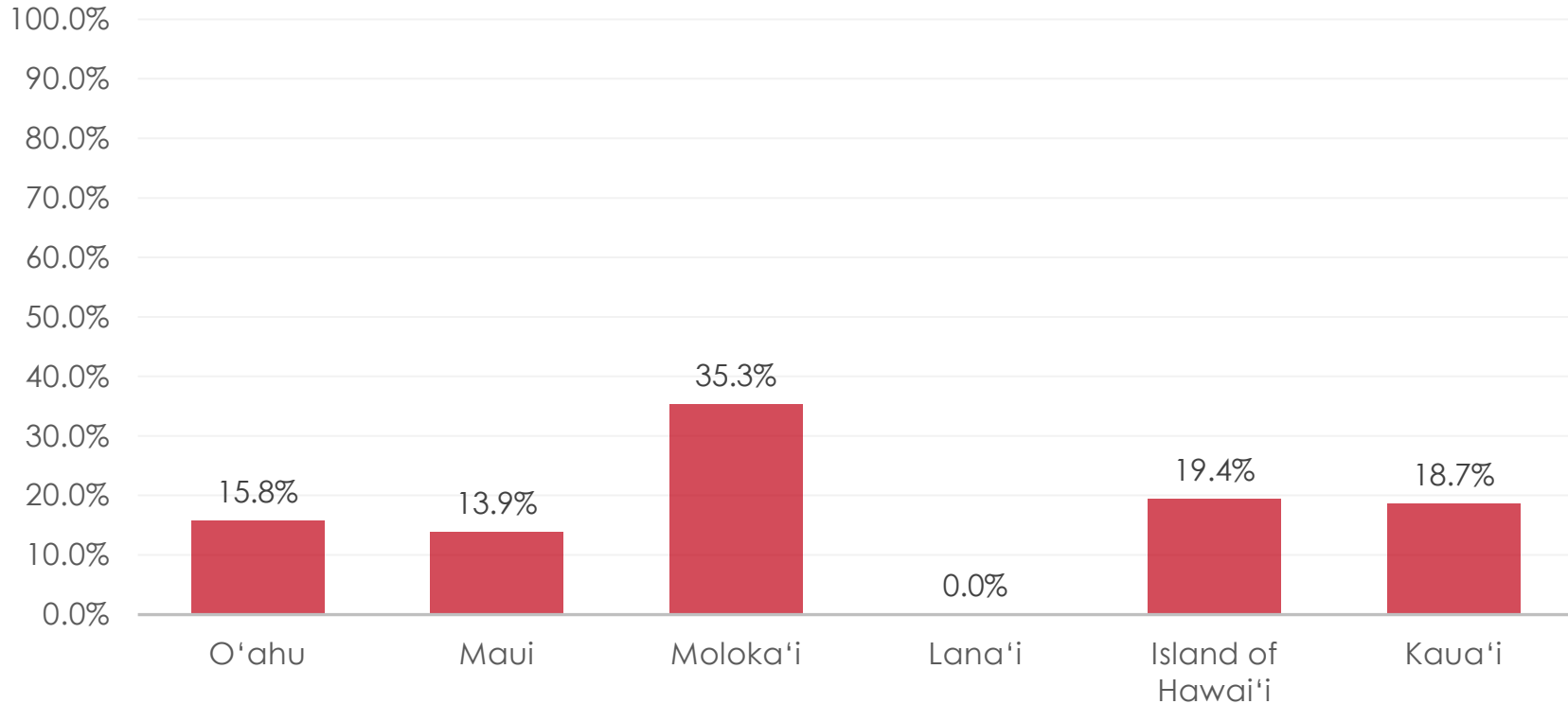
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – JAPAN



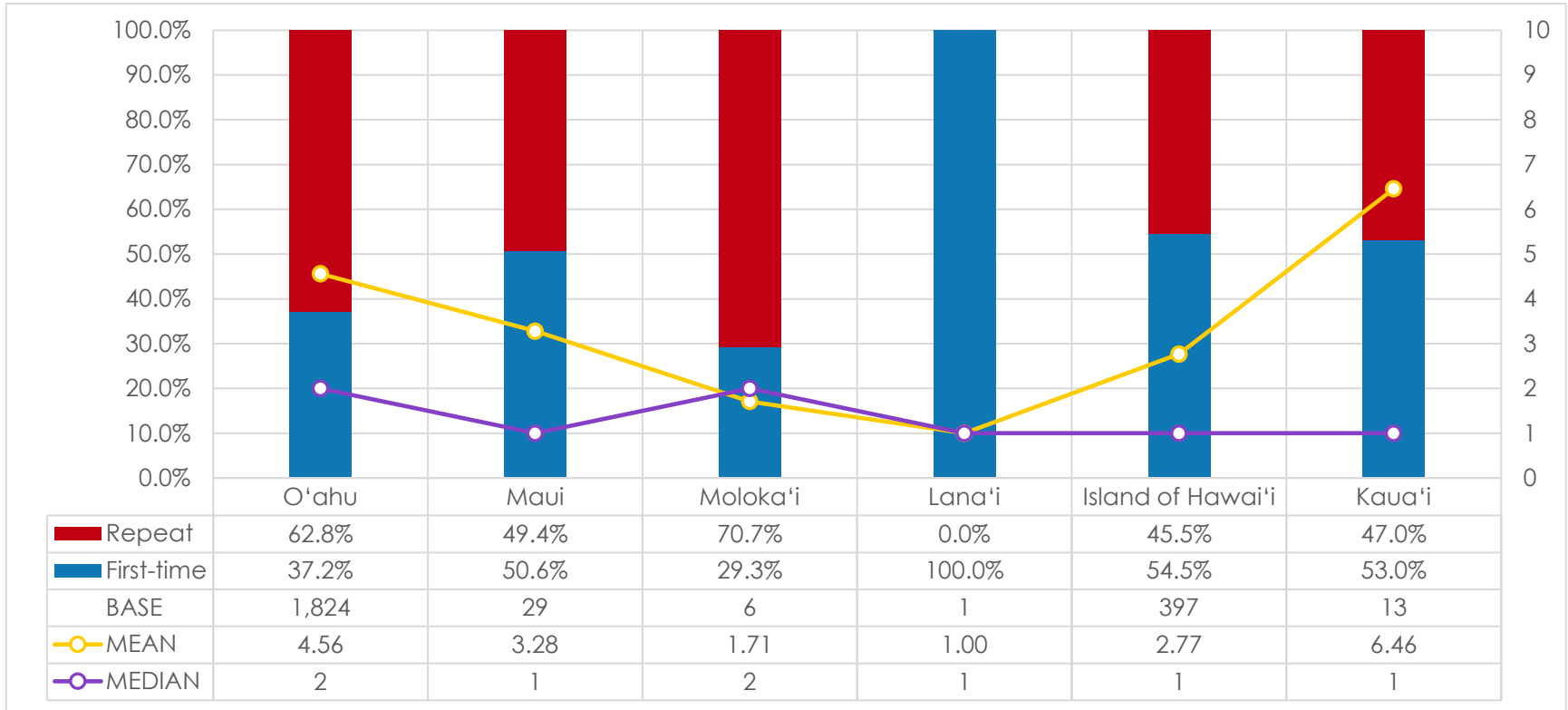
# IMPACT OF OUTDOOR/ SPORTING EVENTS – JAPAN



# IMPACT OF HAWAIIAN CULTURAL EVENTS – JAPAN



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – JAPAN

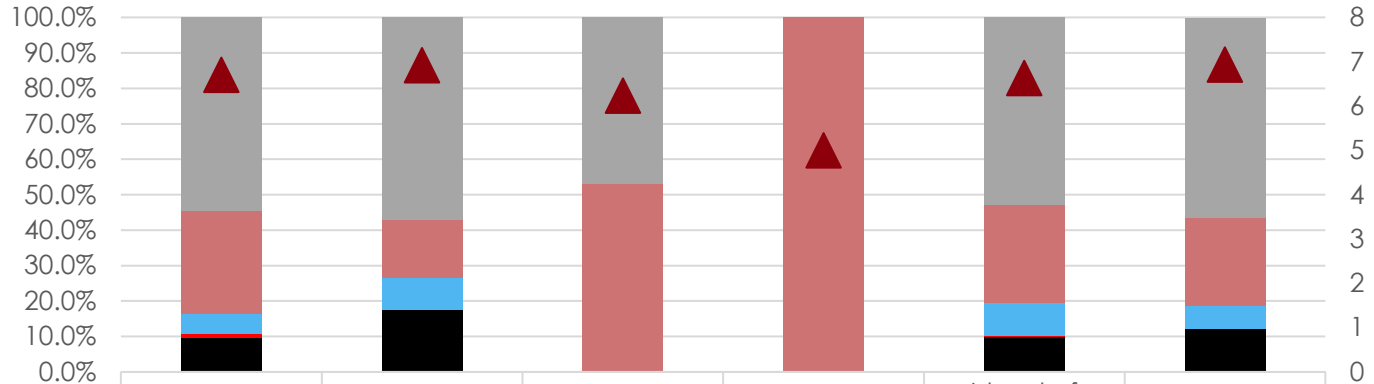


# TRAVEL PARTY MEMBERS – JAPAN

	2016	2017	2018	2019	2020
Spouse	65.0%	51.9%	50.6%	56.6%	46.5%
Other adult family	31.5%	26.2%	23.8%	23.6%	24.5%
Child under 18	17.7%	15.0%	15.9%	17.0%	10.3%
Friends/ associates	17.4%	21.7%	21.9%	21.2%	29.8%
Alone	4.9%	7.5%	7.1%	5.7%	4.9%
Girlfriend/ boyfriend	2.5%	3.8%	6.9%	4.2%	3.9%
Same sex partner	.2%	.4%	0.3%	0.2%	0.2%

# LIKELIHOOD OF RETURN VISIT – JAPAN

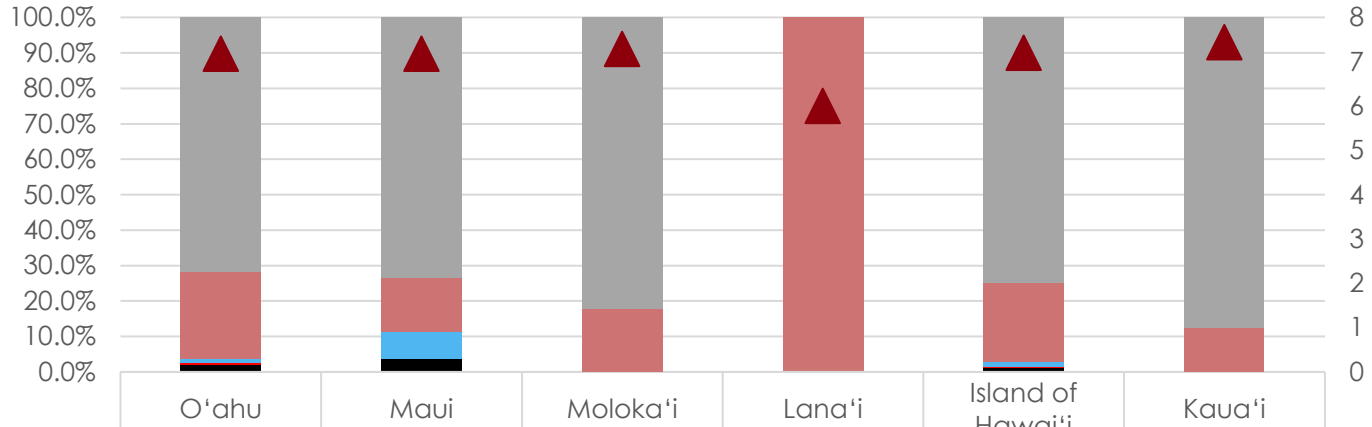
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	54.6%	57.0%	47.0%	0.0%	52.8%	56.4%
■ Somewhat likely (5-6)	28.9%	16.4%	53.0%	100.0%	27.5%	24.9%
■ Somewhat unlikely (3-4)	5.7%	8.8%	0.0%	0.0%	9.5%	6.2%
■ Very unlikely (1-2)	1.2%	0.0%	0.0%	0.0%	0.3%	0.0%
■ Not sure	9.6%	17.7%	0.0%	0.0%	9.8%	12.4%
BASE	1,822	29	6	1	397	13
▲ MEAN	6.70	6.92	6.23	5.00	6.63	6.93

# BRAND/DESTINATION ADVOCACY – JAPAN

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	71.9%	73.4%	82.3%	0.0%	74.9%	87.6%
■ Somewhat likely (5-6)	24.3%	15.2%	17.7%	100.0%	22.2%	12.4%
■ Somewhat unlikely (3-4)	1.4%	7.6%	0.0%	0.0%	1.5%	0.0%
■ Very unlikely (1-2)	0.3%	0.0%	0.0%	0.0%	0.3%	0.0%
■ Not sure	2.2%	3.8%	0.0%	0.0%	1.2%	0.0%
BASE	1,818	29	6	1	396	13
▲ MEAN	7.18	7.18	7.29	6.00	7.20	7.44



# ACTIVITIES – SIGHTSEEING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.8%	93.7%	82.3%	100.0%	94.2%	100.0%
<b>On own (self guided)</b>	64.0%	58.2%	11.7%	0.0%	57.4%	71.9%
<b>Helicopter/ airplane</b>	0.8%	0.0%	0.0%	0.0%	2.3%	6.2%
<b>Boat/ submarine/ whale</b>	13.1%	17.7%	17.7%	0.0%	9.3%	0.0%
<b>Visit towns</b>	28.2%	31.7%	53.0%	100.0%	28.0%	21.9%
<b>Limo/ van/ bus tour</b>	18.0%	12.6%	17.7%	0.0%	33.9%	6.2%
<b>Scenic views/ natural landmark</b>	15.1%	27.9%	17.7%	0.0%	27.8%	37.5%
<b>Movie/ TV/ film location</b>	5.1%	0.0%	0.0%	0.0%	1.3%	9.4%

# STATEWIDE – ACTIVITIES – SIGHTSEEING – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	86.1%	95.5%	95.5%	94.0%
<b>On own (self guided)</b>	43.2%	68.8%	65.1%	63.3%
<b>Helicopter/ airplane</b>	1.3%	2.3%	2.2%	1.1%
<b>Boat/ submarine/ whale</b>	12.2%	9.7%	10.6%	12.7%
<b>Visit towns</b>	29.0%	31.2%	32.7%	29.0%
<b>Limo/ van/ bus tour</b>	27.9%	19.5%	23.1%	21.2%
<b>Scenic views/ natural landmark</b>	25.4%	23.3%	20.8%	18.1%
<b>Movie/ TV/ film location</b>	6.3%	4.1%	3.9%	4.5%

# ACTIVITIES – RECREATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.8%	89.9%	82.3%	100.0%	93.7%	87.6%
<b>Beach/ sunbathing</b>	70.4%	69.6%	70.7%	0.0%	59.6%	46.9%
<b>Bodyboard</b>	1.3%	3.8%	0.0%	0.0%	1.2%	18.8%
<b>Standup paddle board</b>	1.5%	3.8%	0.0%	0.0%	1.6%	0.0%
<b>Surfing</b>	3.4%	0.0%	0.0%	0.0%	0.5%	0.0%
<b>Canoeing/ kayak</b>	1.7%	0.0%	0.0%	0.0%	3.4%	9.4%
<b>Swim ocean</b>	30.5%	39.3%	0.0%	0.0%	22.4%	25.0%
<b>Snorkel</b>	13.3%	17.7%	0.0%	0.0%	16.1%	18.8%
<b>Freediving</b>	0.6%	0.0%	0.0%	0.0%	0.4%	0.0%
<b>Windsurf/ Kitesurf</b>	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	3.4%	0.0%	0.0%	0.0%	0.4%	9.4%
<b>Scuba</b>	2.1%	0.0%	0.0%	0.0%	0.7%	0.0%
<b>Fishing</b>	0.3%	0.0%	0.0%	0.0%	0.5%	9.4%
<b>Golf</b>	4.9%	7.6%	0.0%	0.0%	14.3%	28.2%

# STATEWIDE - ACTIVITIES – RECREATION – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	88.5%	96.2%	96.0%	94.3%
<b>Beach/ sunbathing</b>	68.3%	73.1%	71.6%	69.3%
<b>Bodyboard</b>	5.0%	3.7%	3.5%	1.5%
<b>Standup paddle board</b>	*	*	*	1.5%
<b>Surfing</b>	3.7%	3.6%	2.5%	2.9%
<b>Canoeing/ kayak</b>	2.8%	2.1%	2.7%	2.1%
<b>Swim ocean</b>	NA	38.4%	34.2%	29.8%
<b>Snorkel</b>	NA	17.2%	19.3%	14.3%
<b>Freediving</b>	NA	NA	NA	0.5%
<b>Windsurf/ Kitesurf</b>	0.5%	0.2%	0.2%	0.2%
<b>Jet ski/ Parasail</b>	3.7%	2.9%	2.4%	2.9%
<b>Scuba</b>	3.0%	2.2%	1.7%	1.9%
<b>Fishing</b>	1.2%	1.5%	0.8%	0.4%
<b>Golf</b>	5.4%	7.5%	7.3%	6.9%

\* Combined with bodyboarding

# ACTIVITIES – RECREATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.8%	89.9%	82.3%	100.0%	93.7%	87.6%
<b>Run/ Jog/ Fitness walk</b>	16.9%	30.4%	0.0%	100.0%	14.4%	6.2%
<b>Spa</b>	6.9%	8.8%	0.0%	0.0%	5.6%	0.0%
<b>Hiking</b>	19.3%	27.9%	0.0%	0.0%	11.9%	15.6%
<b>Backpack/Camp</b>	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Agritourism</b>	7.8%	12.6%	82.3%	0.0%	24.6%	9.4%
<b>Sport event/ tournament</b>	1.3%	0.0%	0.0%	0.0%	1.1%	0.0%
<b>Park/ botanical garden</b>	15.2%	19.0%	53.0%	0.0%	20.0%	12.4%
<b>Waterpark</b>	1.8%	6.3%	0.0%	0.0%	1.6%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.2%	0.0%	0.0%	0.0%	1.5%	0.0%
<b>Zip lining</b>	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	1.3%	0.0%	0.0%	0.0%	0.3%	0.0%
<b>All terrain vehicle (ATV)</b>	1.4%	0.0%	0.0%	0.0%	0.3%	0.0%
<b>Horseback riding</b>	2.8%	0.0%	0.0%	0.0%	3.5%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	88.5%	96.2%	96.0%	94.3%
<b>Run/ Jog/ Fitness walk</b>	14.9%	14.7%	12.0%	16.9%
<b>Spa</b>	6.9%	6.5%	6.9%	6.8%
<b>Hiking</b>	7.1%	7.4%	18.2%	18.4%
<b>Backpack/Camp</b>	*	*	0.2%	0.2%
<b>Agritourism</b>	2.7%	12.2%	14.2%	11.5%
<b>Sport event/ tournament</b>	1.9%	1.8%	1.8%	1.3%
<b>Park/ botanical garden</b>	20.1%	24.0%	21.3%	16.7%
<b>Waterpark</b>	NA	3.5%	2.6%	1.8%
<b>Mountain tube/ waterfall rappel</b>	NA	0.7%	0.5%	0.5%
<b>Zip lining</b>	NA	0.7%	1.1%	0.9%
<b>Skydiving</b>	NA	0.8%	0.7%	1.1%
<b>All terrain vehicle (ATV)</b>	NA	1.1%	1.0%	1.2%
<b>Horseback riding</b>	NA	5.0%	4.3%	3.0%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.9%	92.4%	100.0%	100.0%	96.0%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	17.9%	11.4%	0.0%	0.0%	7.3%	40.5%
<b>Live music/ stage show</b>	14.8%	17.7%	0.0%	0.0%	15.7%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.4%	0.0%	35.3%	0.0%	1.7%	0.0%
<b>Fine dining</b>	36.9%	31.7%	70.7%	0.0%	25.8%	9.4%
<b>Family restaurant</b>	25.2%	22.8%	0.0%	100.0%	28.0%	15.6%
<b>Fast food</b>	59.1%	44.3%	29.3%	0.0%	42.6%	25.0%
<b>Food truck</b>	17.3%	26.6%	0.0%	0.0%	5.9%	0.0%
<b>Café/ coffee house</b>	50.3%	49.4%	53.0%	0.0%	46.4%	31.3%
<b>Ethnic dining</b>	6.0%	13.9%	17.7%	0.0%	4.9%	6.2%
<b>Prepared own meal</b>	12.1%	20.2%	0.0%	0.0%	22.3%	43.9%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	92.6%	98.3%	97.5%	97.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	46.6%	15.7%	13.4%	16.3%
<b>Live music/ stage show</b>	17.4%	20.3%	17.9%	15.3%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.1%	6.6%	4.8%	5.6%
<b>Fine dining</b>	36.2%	45.4%	42.6%	35.4%
<b>Family restaurant</b>	26.3%	23.4%	24.0%	25.9%
<b>Fast food</b>	46.4%	53.0%	52.6%	56.2%
<b>Food truck</b>	NA	14.6%	13.4%	15.5%
<b>Café/ coffee house</b>	48.4%	53.8%	50.2%	49.9%
<b>Ethnic dining</b>	7.0%	10.3%	8.6%	6.0%
<b>Prepared own meal</b>	16.7%	18.7%	19.5%	14.5%



# ACTIVITIES – SHOPPING – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.7%	92.4%	82.3%	100.0%	97.7%	93.8%
<b>Mall/ department store</b>	87.3%	64.5%	0.0%	0.0%	51.5%	68.7%
<b>Designer boutique</b>	29.1%	17.7%	0.0%	0.0%	5.5%	9.4%
<b>Hotel/ resort store</b>	33.7%	27.9%	0.0%	0.0%	32.1%	0.0%
<b>Swap meet/ flea market</b>	2.7%	0.0%	0.0%	0.0%	4.7%	0.0%
<b>Discount/ outlet store</b>	28.7%	24.0%	0.0%	0.0%	7.8%	6.2%
<b>Supermarket</b>	66.9%	65.8%	29.3%	100.0%	75.8%	75.1%
<b>Farmer's market</b>	13.8%	13.9%	0.0%	0.0%	18.9%	15.6%
<b>Convenience store</b>	52.7%	34.2%	0.0%	0.0%	23.4%	9.4%
<b>Duty free store</b>	45.5%	12.6%	53.0%	0.0%	5.0%	15.6%
<b>Local shop/ artisan</b>	10.1%	29.1%	17.7%	0.0%	16.8%	18.8%

# STATEWIDE - ACTIVITIES – SHOPPING – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	96.6%	97.6%	98.0%	97.6%
<b>Mall/ department store</b>	82.2%	79.9%	78.2%	81.5%
<b>Designer boutique</b>	33.5%	25.1%	20.2%	25.0%
<b>Hotel/ resort store</b>	39.2%	35.4%	34.7%	33.8%
<b>Swap meet/ flea market</b>	8.9%	3.6%	3.6%	3.1%
<b>Discount/ outlet store</b>	34.1%	23.7%	20.8%	25.3%
<b>Supermarket</b>	57.7%	65.7%	68.6%	69.1%
<b>Farmer's market</b>	18.6%	18.1%	19.1%	15.1%
<b>Convenience store</b>	54.1%	45.6%	42.7%	47.4%
<b>Duty free store</b>	43.6%	42.1%	32.1%	38.4%
<b>Local shop/ artisan</b>	15.3%	10.7%	11.4%	11.8%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	49.9%	74.7%	29.3%	100.0%	62.6%	84.4%
<b>Historic military site</b>	13.9%	17.7%	29.3%	100.0%	17.1%	9.4%
<b>Other historical site</b>	10.6%	27.9%	17.7%	0.0%	28.2%	43.7%
<b>Museum/ art gallery</b>	6.2%	0.0%	0.0%	0.0%	4.8%	15.6%
<b>Luau/ Polynesian show/ hula show</b>	12.9%	15.2%	0.0%	0.0%	13.2%	0.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	6.9%	13.9%	0.0%	0.0%	6.3%	0.0%
<b>Play/ concert/ theatre</b>	3.5%	0.0%	0.0%	0.0%	1.4%	9.4%
<b>Art/ craft fair</b>	4.8%	0.0%	0.0%	0.0%	2.5%	6.2%
<b>Festival event</b>	1.7%	17.7%	0.0%	0.0%	2.9%	9.4%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	39.9%	55.5%	55.2%	53.1%
<b>Historic military site</b>	11.3%	18.1%	16.0%	14.7%
<b>Other historical site</b>	10.6%	18.1%	17.5%	14.3%
<b>Museum/ art gallery</b>	6.9%	6.4%	5.5%	6.1%
<b>Luau/ Polynesian show/ hula show</b>	10.5%	12.9%	14.0%	13.3%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	6.3%	6.4%	7.1%	7.0%
<b>Play/ concert/ theatre</b>	2.3%	3.1%	3.6%	3.1%
<b>Art/ craft fair</b>	2.2%	3.4%	3.4%	4.4%
<b>Festival event</b>	3.2%	3.1%	2.6%	2.2%

# ACTIVITIES – TRANSPORTATION – JAPAN

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	96.5%	92.4%	100.0%	100.0%	98.3%	100.0%
<b>Airport shuttle</b>	28.8%	11.4%	0.0%	0.0%	24.6%	0.0%
<b>Trolley</b>	60.4%	16.4%	0.0%	0.0%	22.5%	15.6%
<b>Public bus</b>	19.1%	0.0%	0.0%	0.0%	1.7%	6.2%
<b>Tour bus/ tour van</b>	24.4%	24.0%	64.7%	0.0%	37.9%	18.7%
<b>Taxi/ limo</b>	29.2%	24.0%	35.3%	0.0%	18.9%	12.4%
<b>Rental car</b>	17.8%	54.5%	70.7%	100.0%	41.7%	59.5%
<b>Ride share</b>	6.0%	2.5%	0.0%	0.0%	2.8%	0.0%
<b>Bicycle rental</b>	4.6%	0.0%	0.0%	0.0%	1.7%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – JAPAN

	2017	2018	2019	2020
<b>TOTAL</b>	98.6%	95.9%	96.9%	96.8%
<b>Airport shuttle</b>	32.0%	24.0%	25.5%	28.0%
<b>Trolley</b>	56.1%	46.1%	44.1%	53.6%
<b>Public bus</b>	19.2%	16.9%	13.3%	16.0%
<b>Tour bus/ tour van</b>	31.2%	27.0%	31.1%	27.5%
<b>Taxi/ limo</b>	33.2%	31.7%	28.5%	27.8%
<b>Rental car</b>	23.4%	33.1%	32.8%	23.1%
<b>Ride share</b>	NA	3.2%	5.2%	5.3%
<b>Bicycle rental</b>	NA	2.9%	2.8%	4.0%

## ACTIVITIES – OTHER – JAPAN

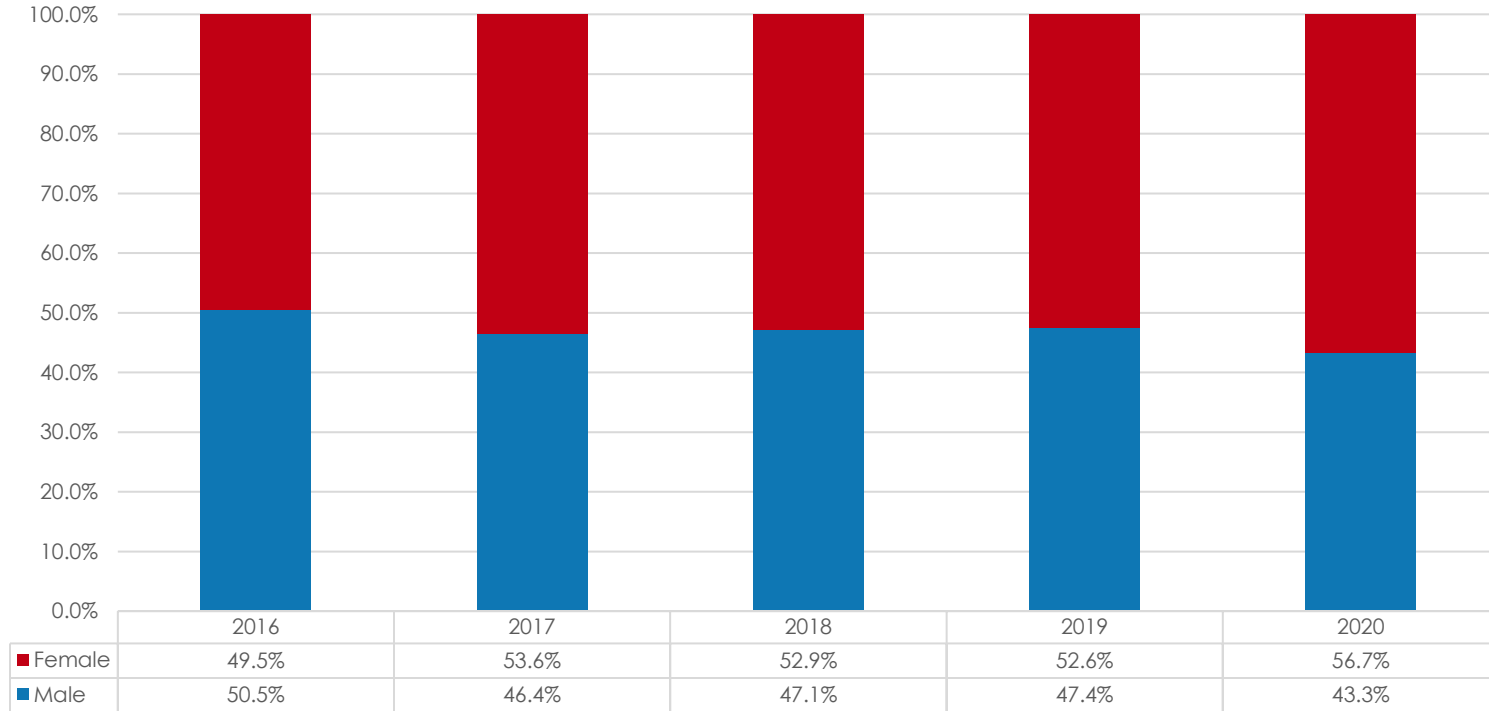
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	13.8%	25.3%	0.0%	0.0%	10.1%	31.3%
<b>Visit friends/ family</b>	12.8%	25.3%	0.0%	0.0%	8.9%	25.0%
<b>Volunteer non profit</b>	1.2%	0.0%	0.0%	0.0%	1.2%	6.2%

## ACTIVITIES – OTHER – JAPAN

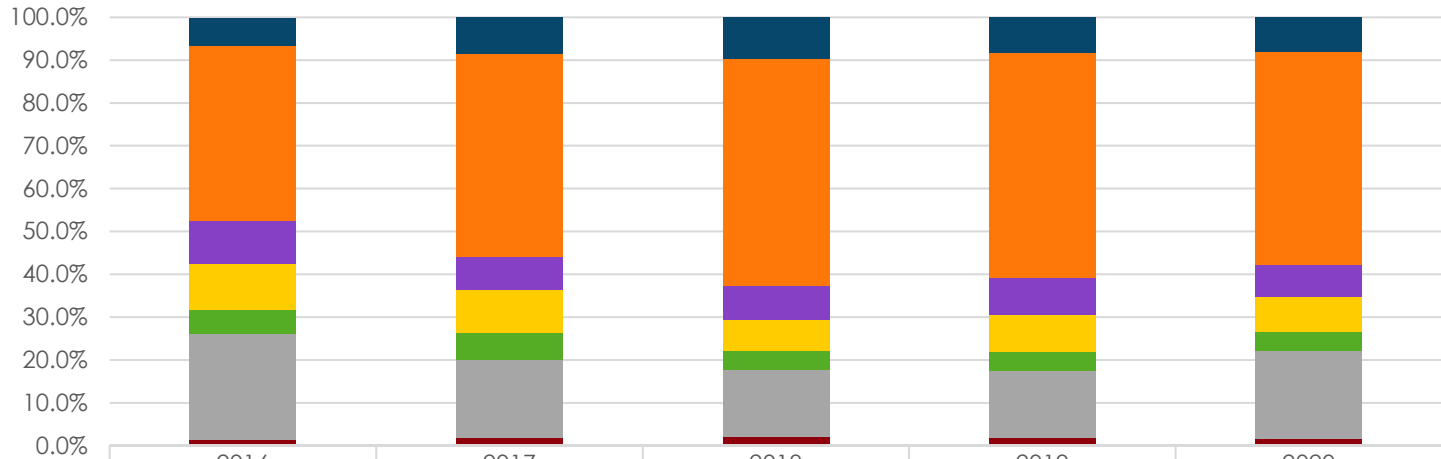
	2018	2019	2020
<b>TOTAL</b>	12.6%	11.8%	13.5%
<b>Visit friends/ family</b>	11.9%	11.3%	12.4%
<b>Volunteer non profit</b>	0.9%	0.7%	1.3%



# VISITOR PROFILE – GENDER – JAPAN

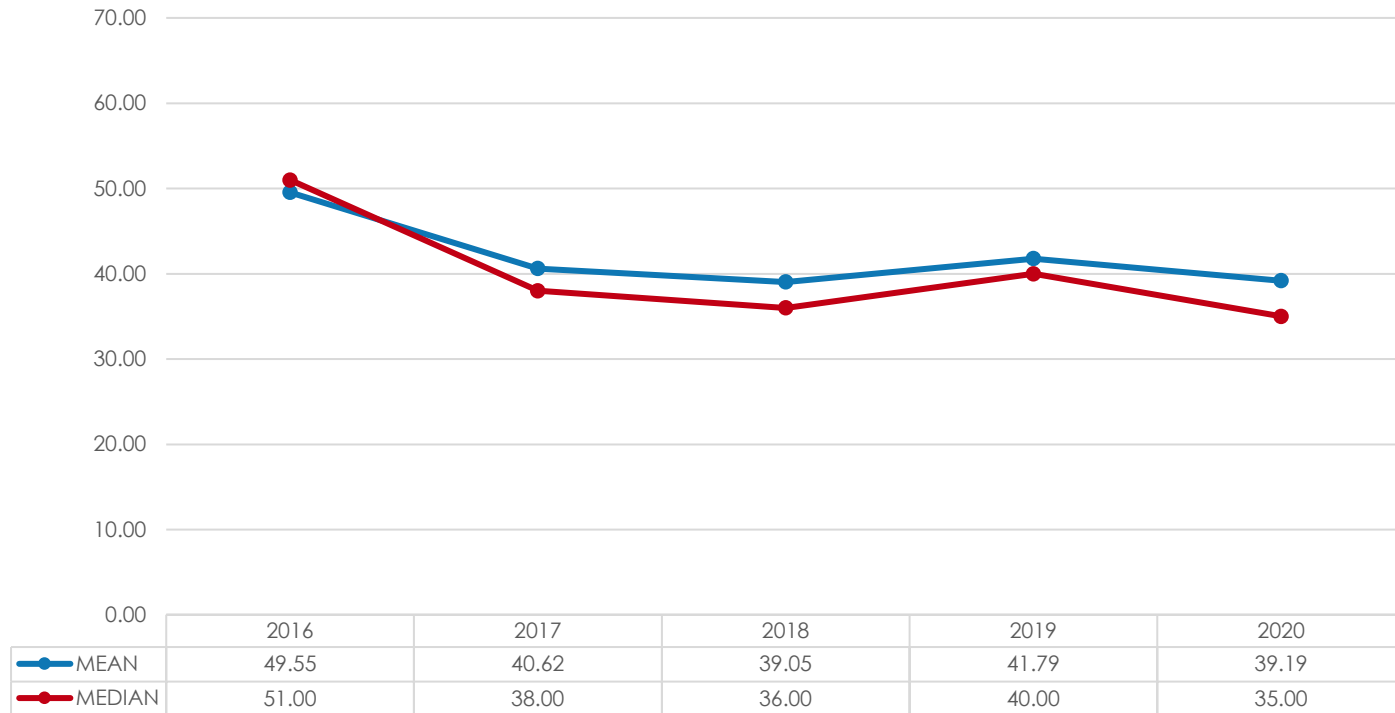


# VISITOR PROFILE – EDUCATION – JAPAN

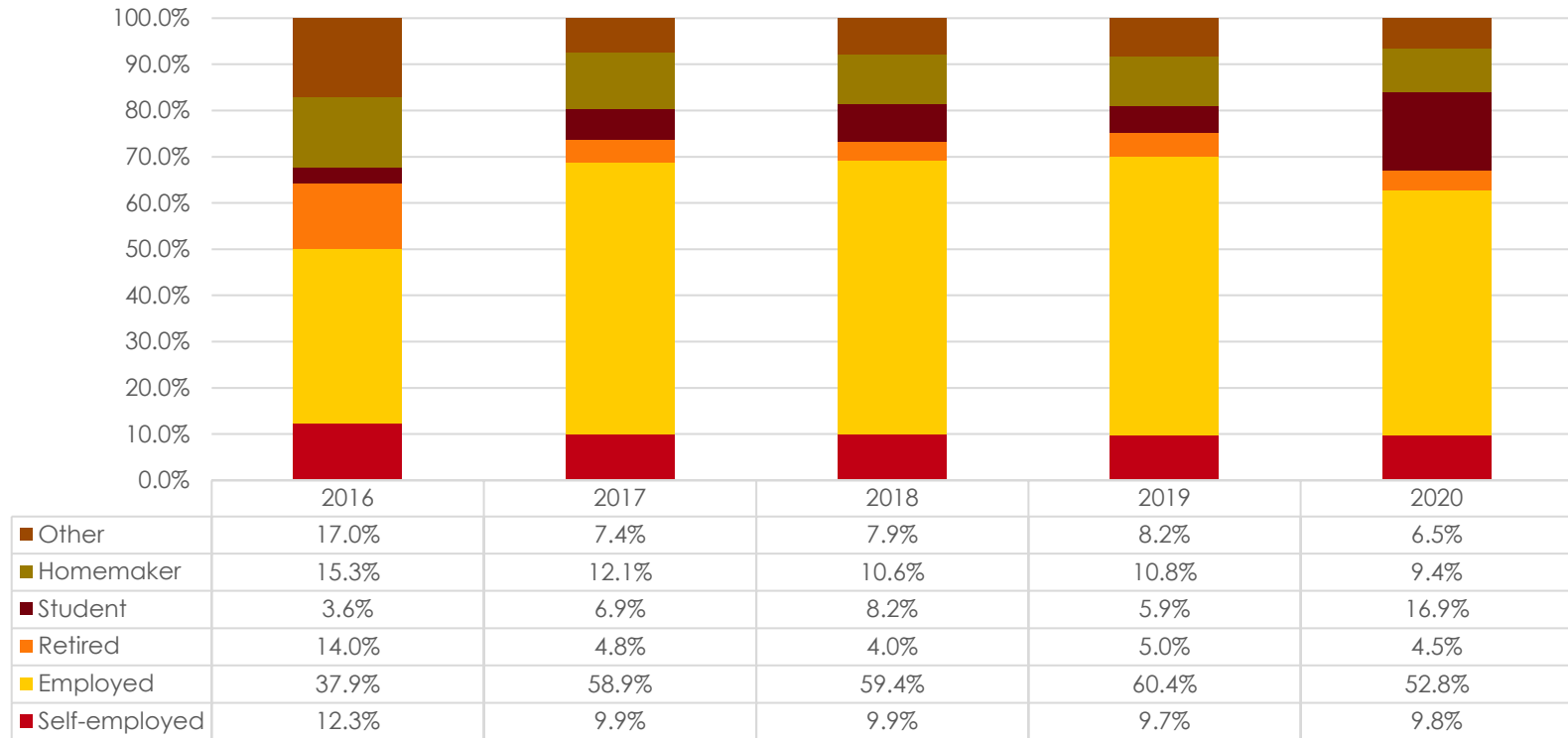


	2016	2017	2018	2019	2020
Post-Graduate	6.5%	8.4%	9.8%	8.4%	8.1%
College Grad	41.0%	47.5%	52.9%	52.6%	49.6%
Associate Degree	9.9%	7.5%	8.0%	8.6%	7.7%
Vocational/ Tech	10.7%	10.2%	7.3%	8.6%	8.1%
Some College	5.8%	6.2%	4.4%	4.5%	4.3%
H.S. Grad	24.6%	18.2%	15.6%	15.5%	20.6%
Some / No H.S.	1.4%	1.9%	2.1%	1.9%	1.6%

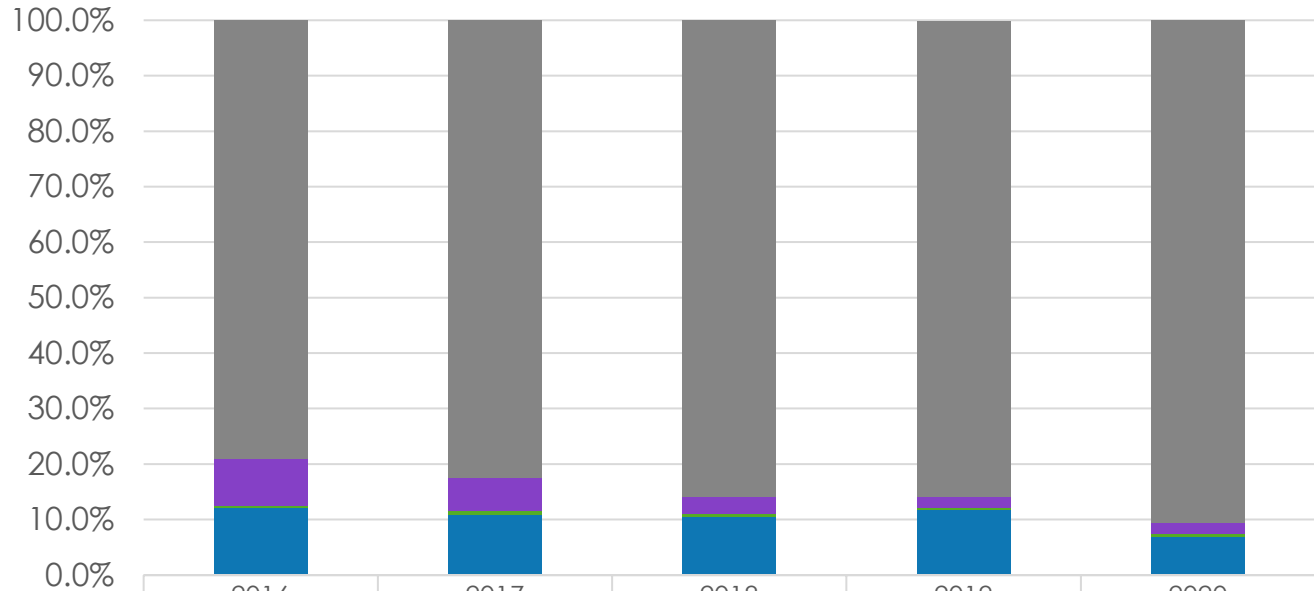
# VISITOR PROFILE – AGE – JAPAN



# VISITOR PROFILE – EMPLOYMENT STATUS – JAPAN



# VISITOR PROFILE – HAWAII PROPERTY OWNER – JAPAN



	2016	2017	2018	2019	2020
■ Do not nor plan to purchase	79.0%	82.6%	85.9%	85.7%	90.6%
■ Plan to in future	8.3%	5.8%	3.0%	2.0%	1.9%
■ Other Property Type	0.4%	0.9%	0.6%	0.4%	0.7%
■ Timeshare	12.2%	10.8%	10.5%	11.8%	6.8%

## VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

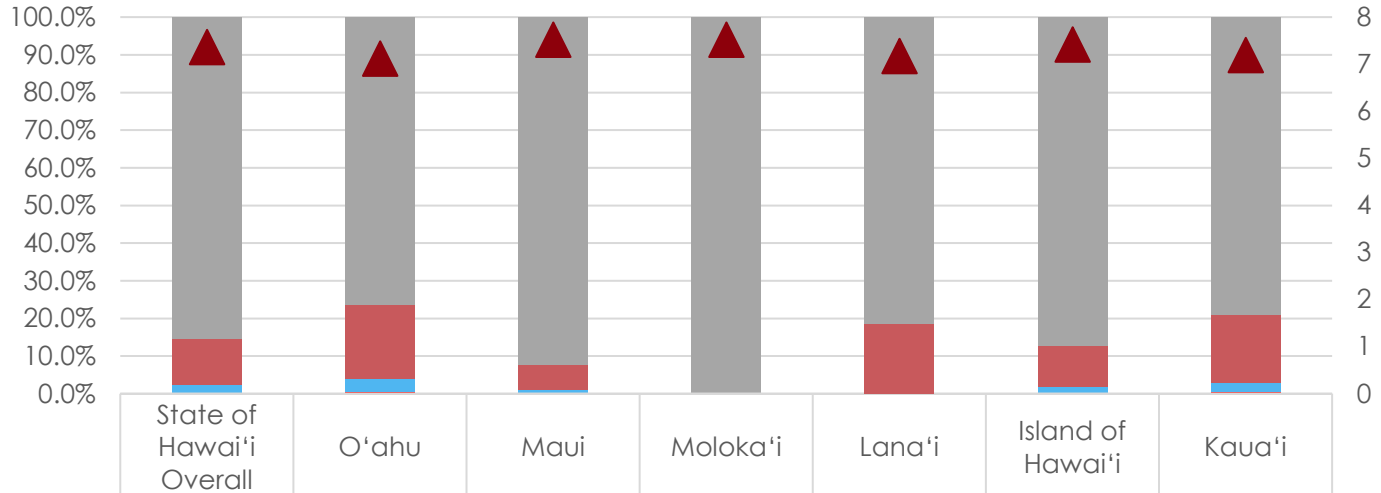
	2018	2019	2020
< ¥3.5 million	21.2%	17.0%	23.3%
¥3.5 ¥4.5 million	14.1%	13.6%	12.8%
¥4.5 ¥5.5 million	10.8%	10.5%	10.0%
¥5.5 ¥6.5 million	7.4%	7.8%	7.5%
¥6.5 ¥7.5 million	7.0%	6.2%	5.2%
¥7.5 ¥8.5 million	6.8%	7.7%	9.2%
¥8.5 ¥10.0 million	8.7%	9.9%	9.5%
¥10.0 ¥15.0 million	13.3%	15.3%	13.1%
¥15.0 ¥20.0 million	4.7%	5.8%	3.9%
¥20.0 million +	5.9%	6.4%	5.5%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – CANADA

# OVERALL SATISFACTION – MOST RECENT VISIT – CANADA

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	85.4%	76.3%	92.3%	100.0%	81.7%	87.4%	78.9%
■ Above Average (5-6)	12.1%	19.6%	6.4%	0.0%	18.3%	10.8%	18.3%
■ Below Average (3-4)	2.3%	3.6%	1.2%	0.0%	0.0%	1.8%	2.4%
■ Poor (1-2)	0.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%
BASE	1,689	727	567	8	11	503	270
▲ MEAN	7.36	7.12	7.52	7.52	7.17	7.42	7.19



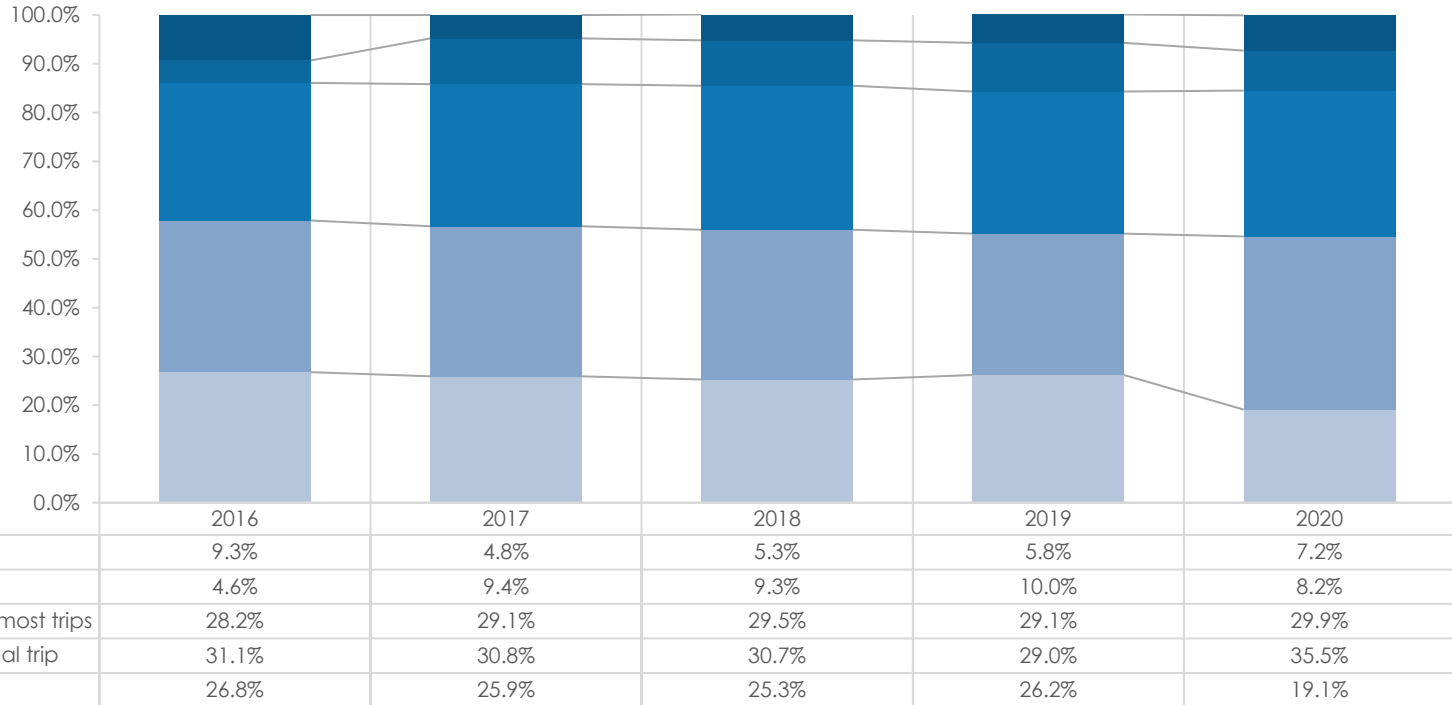
# PRIMARY TRIP PURPOSE CANADA

	2018	2019	2020
Vacation	74.3%	74.5%	84.6%
Visit friends or relatives	3.1%	2.9%	4.3%
Convention, conference or seminar	1.8%	1.4%	1.8%
Honeymoon	2.8%	2.6%	1.7%
Anniversary/ birthday	5.7%	6.8%	1.6%
Attend wedding/ vow renewal	2.8%	2.1%	0.7%
Family gathering/ reunion	2.1%	2.1%	0.2%

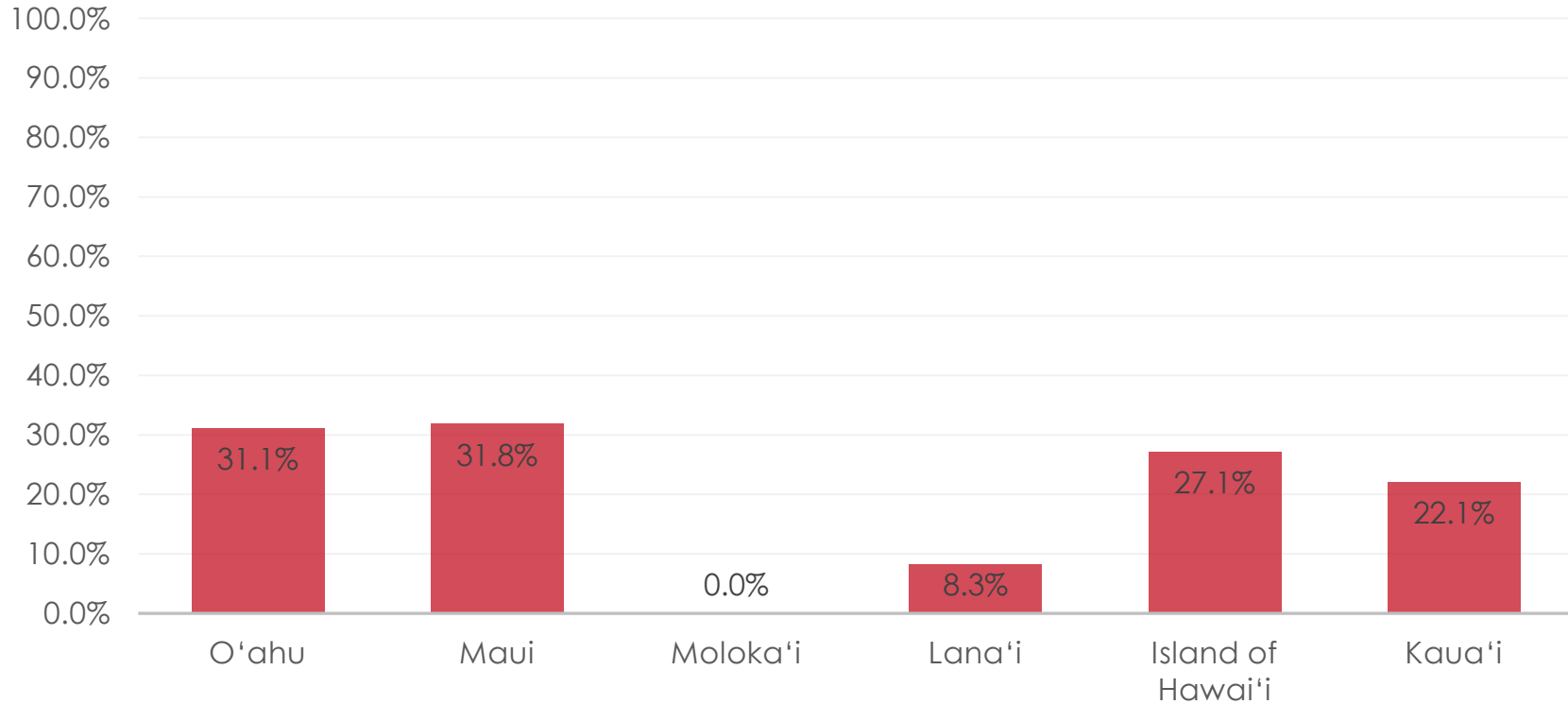
# TRIP PURPOSE – MULTIPLE RESPONSE CANADA

	2018	2019	2020
Vacation	91.4%	91.7%	94.8%
Visit friends/ relatives	8.4%	7.1%	11.7%
Anniversary/ birthday	12.1%	13.6%	3.2%
Convention, conference, seminar	2.5%	2.1%	2.8%
Honeymoon	2.9%	2.9%	2.0%
Incentive trip	1.5%	1.2%	1.8%
Family gathering/ reunion	5.4%	5.8%	0.2%
Vacation home/ timeshare	5.1%	4.7%	0.0%
Attend wedding/ vow renewal	3.2%	2.4%	0.8%

# VACATION TRIP DESCRIPTION – CANADA

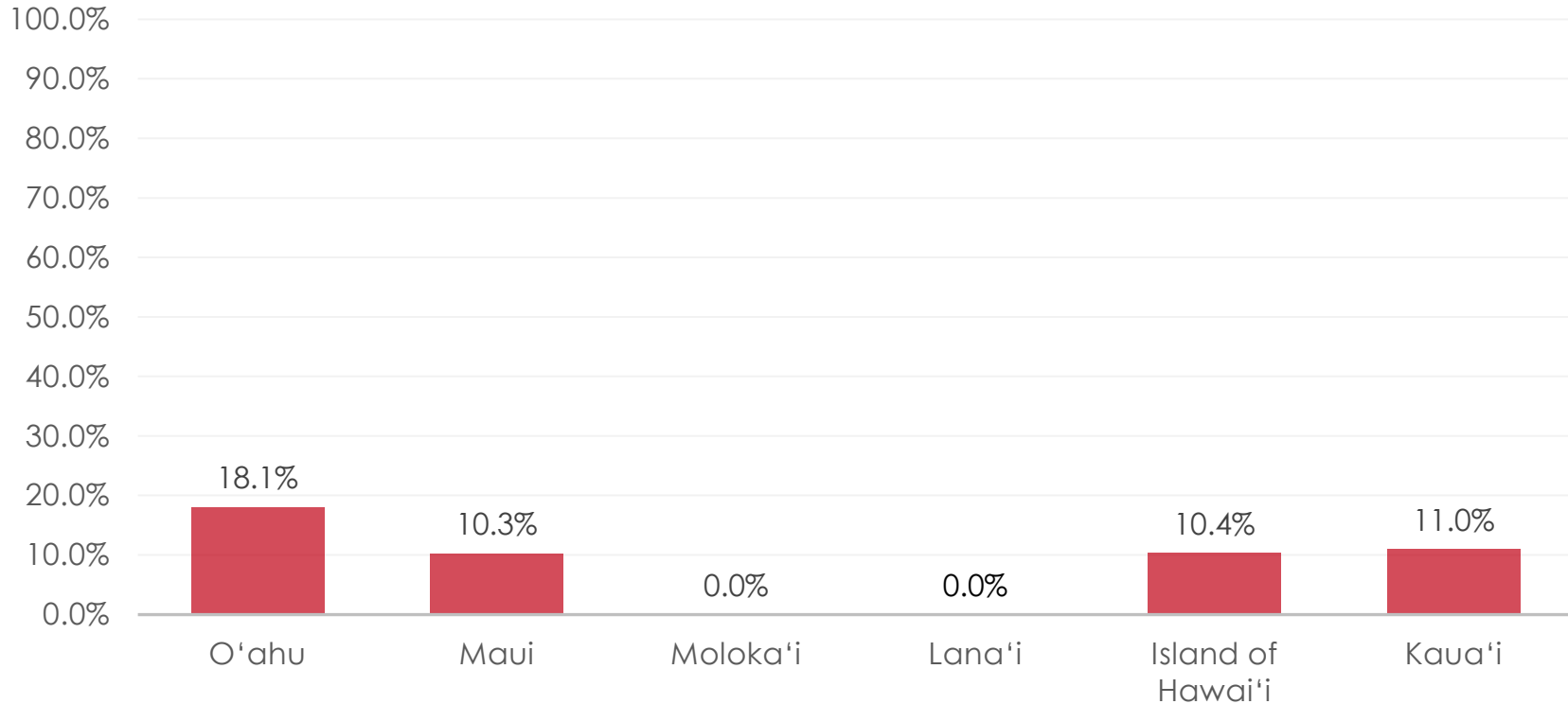


# ADVERTISING AWARENESS – CANADA

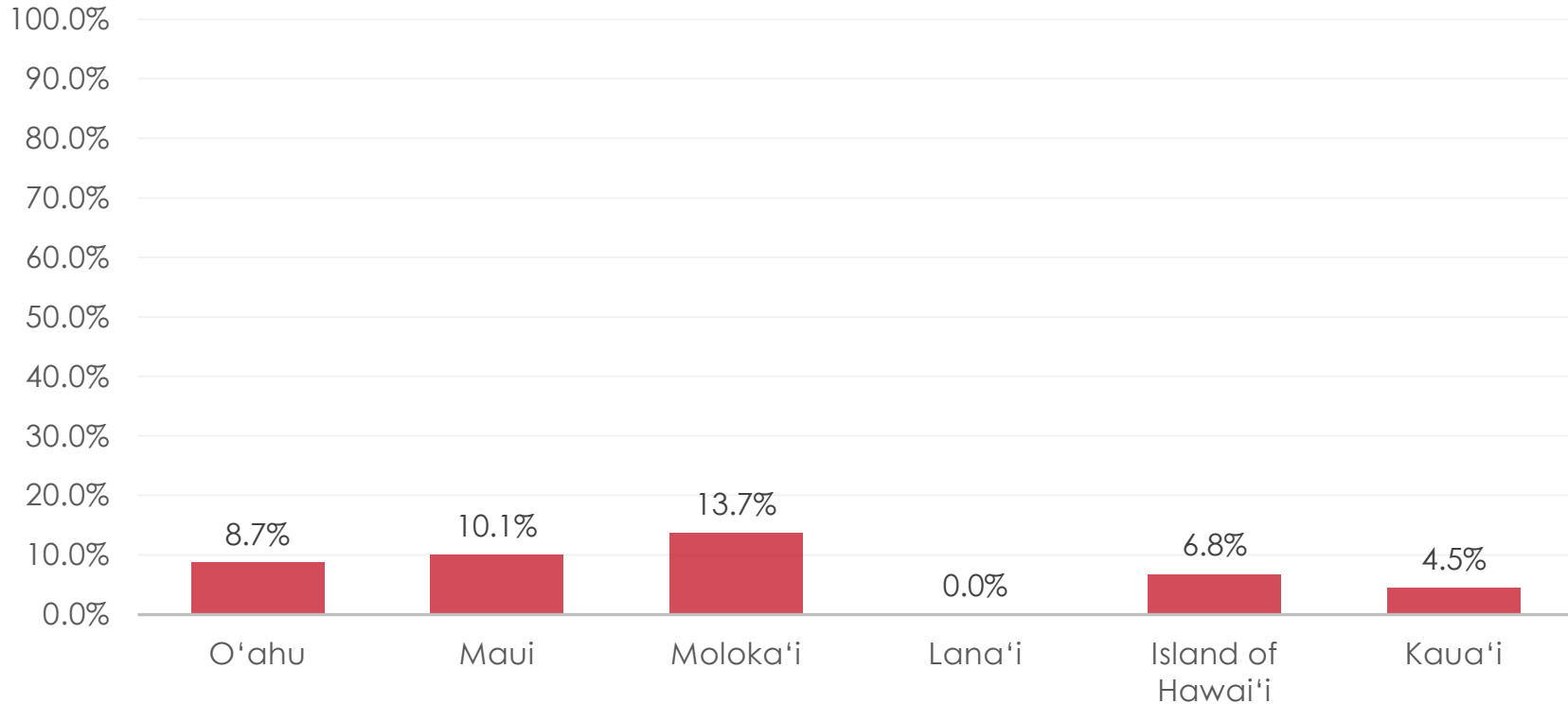


220 Q. Do you remember seeing or hearing advertising for \_\_\_ prior to your arrival?

# IMPACT OF LOCATION FILMING – CANADA

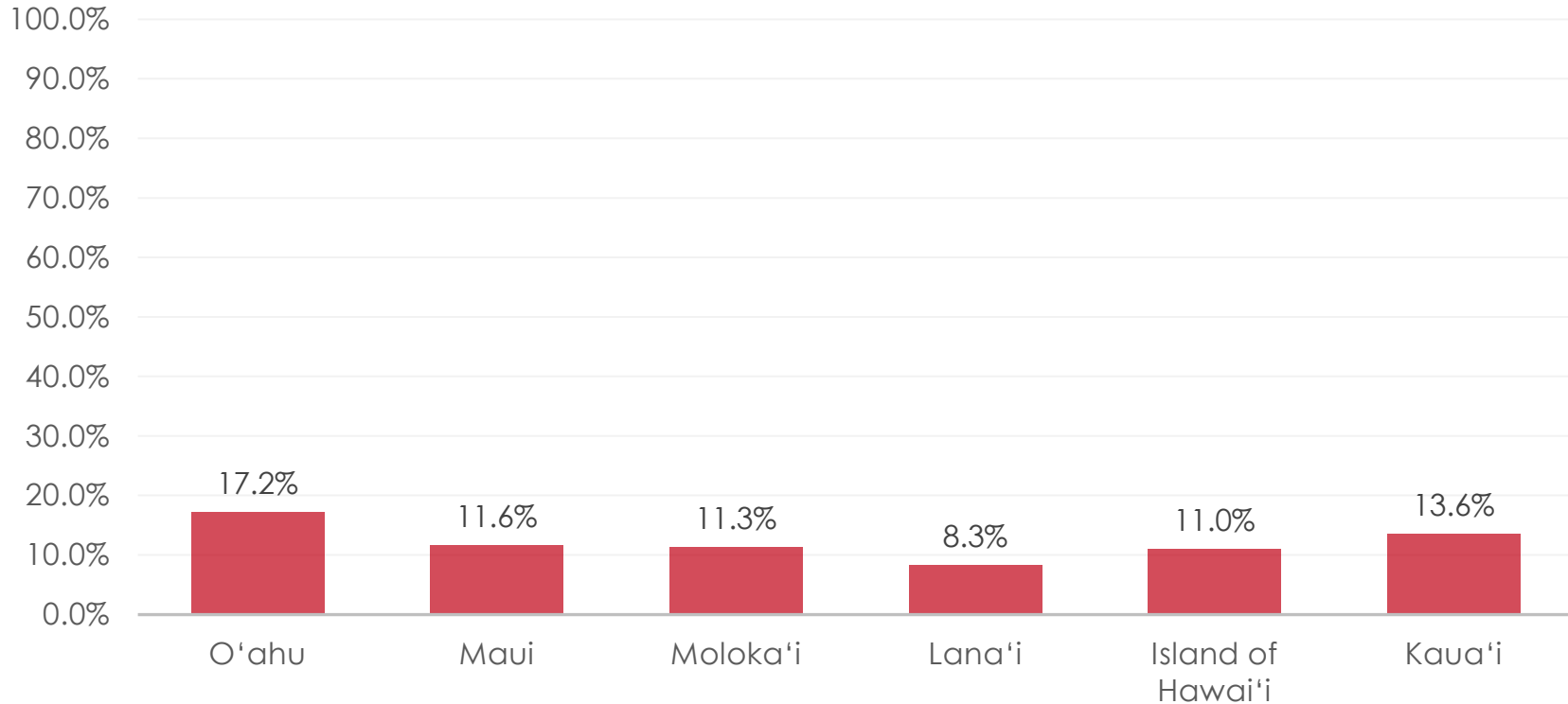


# IMPACT OF HAWAIIAN MUSIC – CANADA

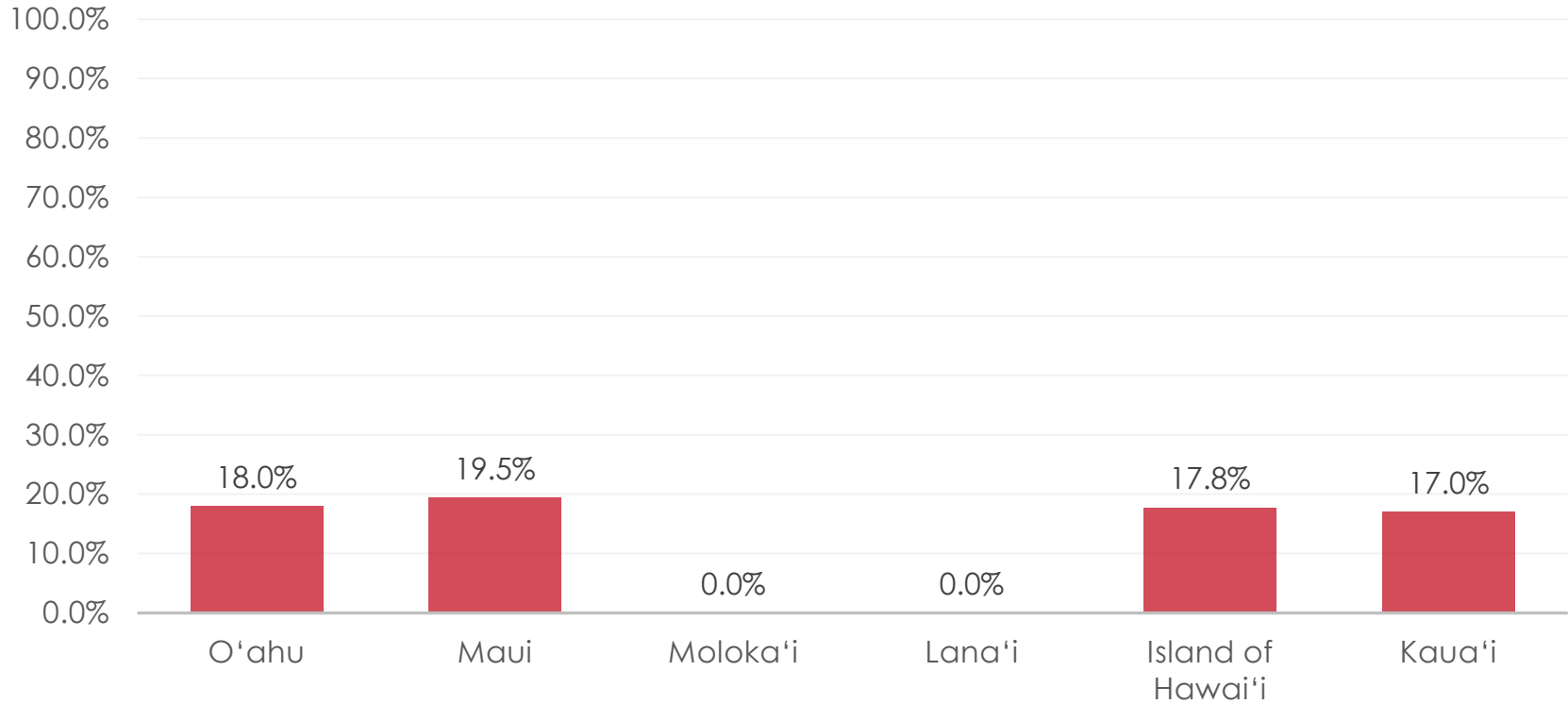


222 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS– CANADA

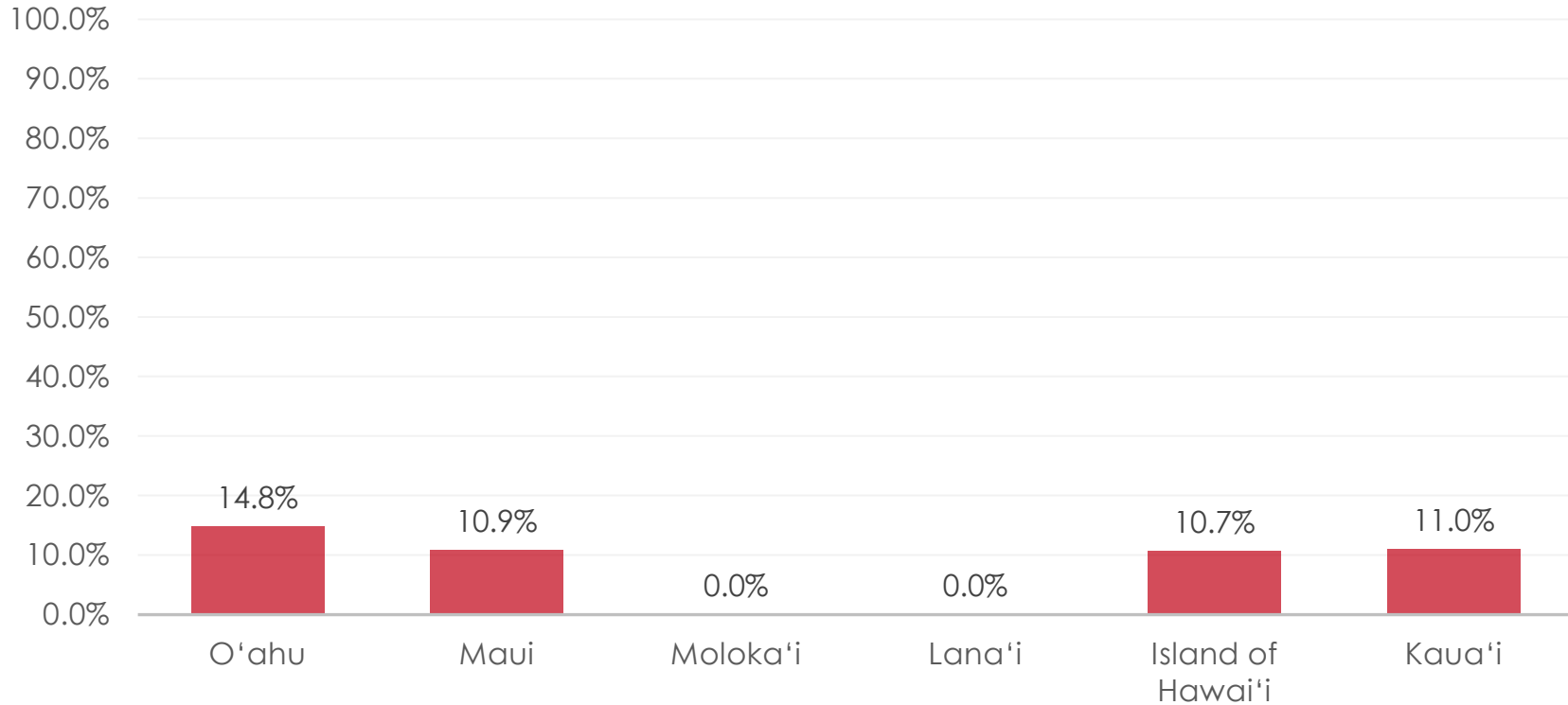


# IMPACT OF OUTDOOR/ SPORTING EVENTS – CANADA



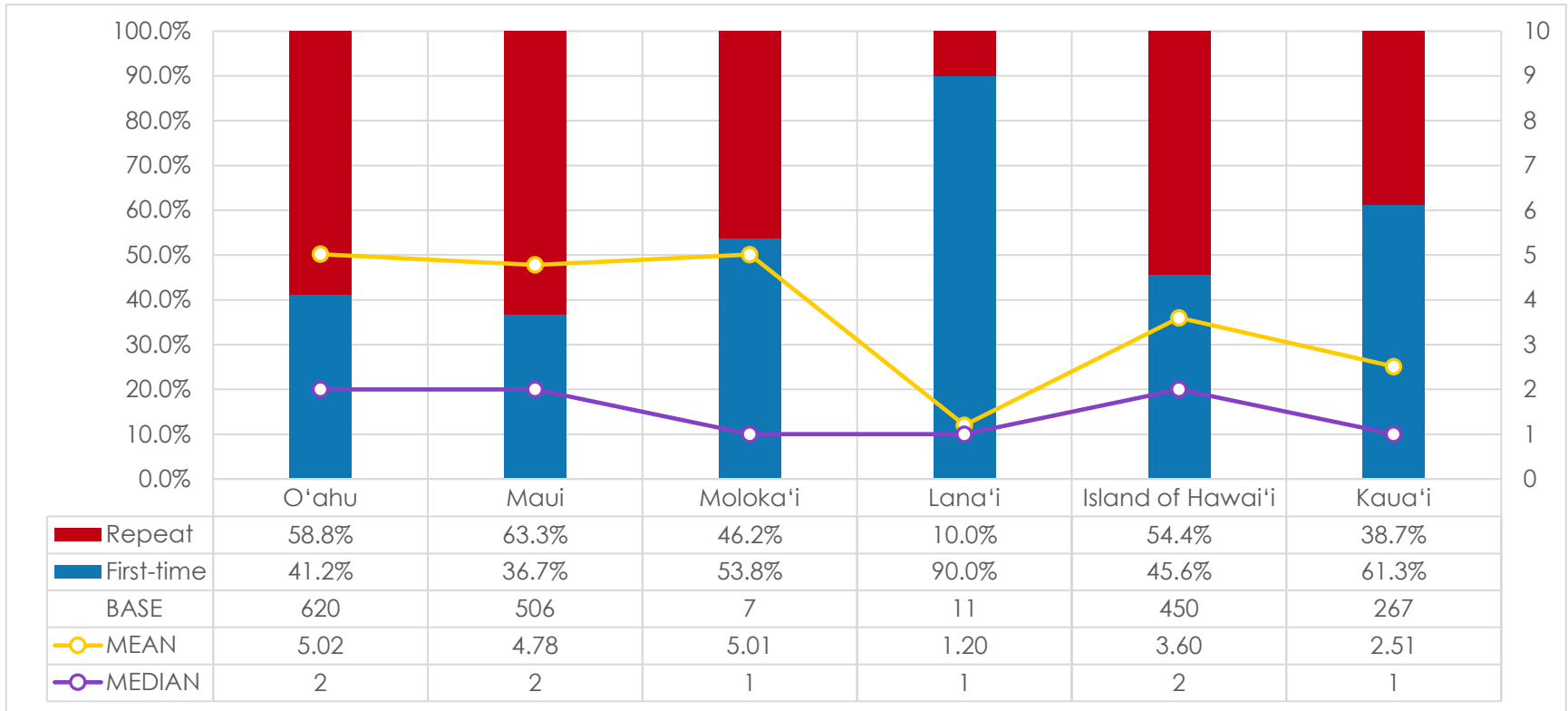


# IMPACT OF HAWAIIAN CULTURAL EVENTS – CANADA



225 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – CANADA

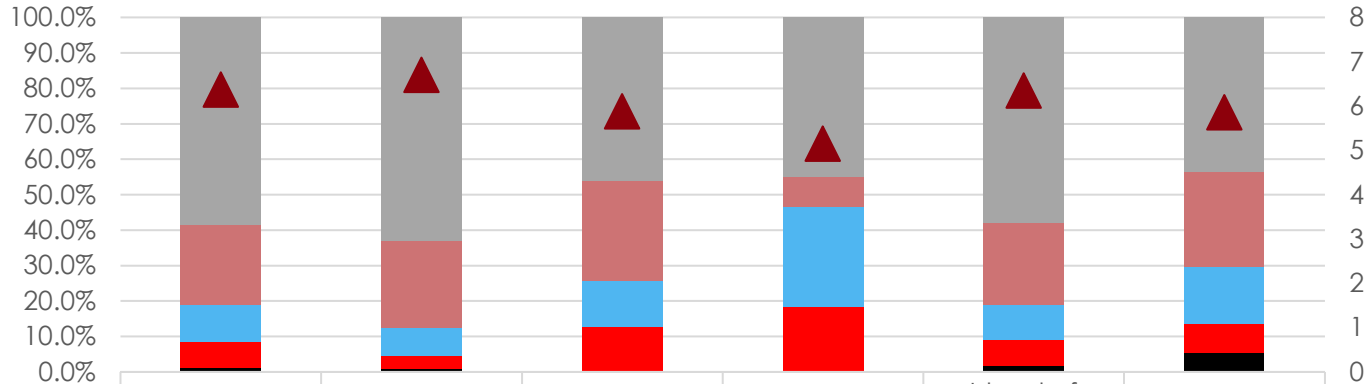


# TRAVEL PARTY MEMBERS – CANADA

	2016	2017	2018	2019	2020
<b>Spouse</b>	69.7%	66.6%	63.3%	62.1%	66.4%
<b>Other adult family</b>	27.2%	25.1%	28.6%	28.3%	27.3%
<b>Child under 18</b>	23.2%	23.9%	22.9%	23.7%	17.7%
<b>Friends/ associates</b>	18.6%	17.9%	18.2%	17.0%	17.9%
<b>Alone</b>	6.6%	6.4%	6.0%	6.0%	6.4%
<b>Girlfriend/ boyfriend</b>	6.7%	7.0%	8.3%	8.6%	6.9%
<b>Same sex partner</b>	.6%	.9%	0.9%	1.2%	0.9%

# LIKELIHOOD OF RETURN VISIT – CANADA

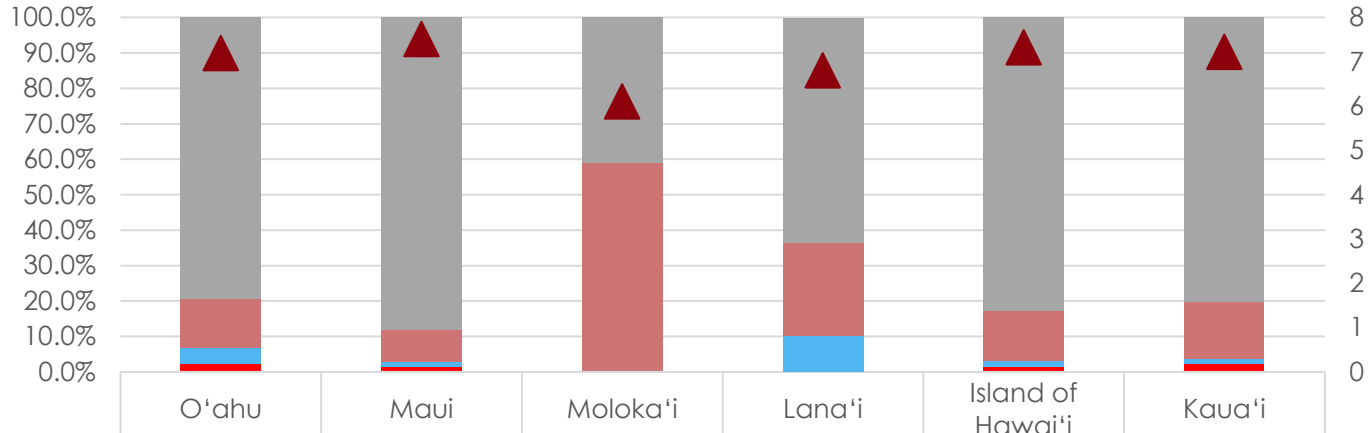
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	58.8%	63.3%	46.2%	45.0%	57.8%	43.5%
■ Somewhat likely (5-6)	22.4%	24.4%	28.2%	8.3%	23.2%	26.6%
■ Somewhat unlikely (3-4)	10.6%	7.9%	12.8%	28.4%	9.8%	16.3%
■ Very unlikely (1-2)	7.1%	3.4%	12.8%	18.3%	7.4%	8.1%
■ Not sure	1.3%	1.1%	0.0%	0.0%	1.8%	5.4%
BASE	615	506	7	11	448	266
▲ MEAN	6.37	6.70	5.88	5.15	6.35	5.86

# BRAND/DESTINATION ADVOCACY – CANADA

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



■ Very likely (7-8)	79.5%	88.3%	41.0%	63.3%	82.7%	80.3%
■ Somewhat likely (5-6)	14.0%	9.0%	59.0%	26.6%	14.0%	15.9%
■ Somewhat unlikely (3-4)	4.3%	1.3%	0.0%	10.0%	1.7%	1.5%
■ Very unlikely (1-2)	2.3%	1.4%	0.0%	0.0%	1.5%	2.3%
■ Not sure	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	613	504	7	11	446	266
▲ MEAN	7.19	7.51	6.10	6.80	7.32	7.22

229 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

# ACTIVITIES – SIGHTSEEING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.1%	96.2%	100.0%	81.7%	96.9%	97.3%
<b>On own (self guided)</b>	72.6%	86.1%	87.2%	35.0%	91.6%	84.9%
<b>Helicopter/ airplane</b>	1.9%	3.0%	12.8%	0.0%	2.7%	7.9%
<b>Boat/ submarine/ whale</b>	13.6%	40.5%	0.0%	0.0%	25.6%	26.6%
<b>Visit towns</b>	43.1%	61.4%	74.4%	8.3%	67.4%	60.8%
<b>Limo/ van/ bus tour</b>	13.7%	7.2%	0.0%	28.4%	5.8%	5.1%
<b>Scenic views/ natural landmark</b>	56.5%	62.9%	71.8%	36.7%	67.8%	69.0%
<b>Movie/ TV/ film location</b>	7.2%	0.6%	0.0%	0.0%	1.1%	3.8%

# STATEWIDE – ACTIVITIES – SIGHTSEEING – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	97.9%	96.7%	96.2%	95.7%
<b>On own (self guided)</b>	87.5%	85.5%	84.0%	84.0%
<b>Helicopter/ airplane</b>	10.1%	8.9%	7.6%	3.6%
<b>Boat/ submarine/ whale</b>	29.6%	25.2%	25.7%	27.8%
<b>Visit towns</b>	40.0%	59.5%	57.0%	58.0%
<b>Limo/ van/ bus tour</b>	11.2%	10.8%	9.7%	9.1%
<b>Scenic views/ natural landmark</b>	76.6%	68.0%	65.2%	63.4%
<b>Movie/ TV/ film location</b>	5.9%	5.0%	5.1%	3.7%

# ACTIVITIES – RECREATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.0%	98.2%	87.2%	75.1%	98.7%	95.7%
<b>Beach/ sunbathing</b>	87.4%	92.0%	74.4%	56.7%	87.3%	84.4%
<b>Bodyboard</b>	8.0%	13.8%	0.0%	0.0%	16.0%	8.3%
<b>Standup paddle board</b>	4.4%	3.7%	0.0%	0.0%	3.8%	2.2%
<b>Surfing</b>	10.1%	6.6%	0.0%	0.0%	3.6%	6.7%
<b>Canoeing/ kayak</b>	2.8%	5.0%	0.0%	0.0%	6.3%	11.3%
<b>Swim ocean</b>	67.1%	72.7%	15.4%	10.0%	68.5%	62.9%
<b>Snorkel</b>	35.6%	49.1%	0.0%	0.0%	56.1%	41.2%
<b>Freediving</b>	1.0%	1.2%	0.0%	0.0%	1.3%	0.0%
<b>Windsurf/ Kitesurf</b>	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	1.1%	0.2%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	2.7%	4.5%	0.0%	0.0%	2.1%	3.1%
<b>Fishing</b>	1.9%	1.6%	0.0%	0.0%	2.8%	1.9%
<b>Golf</b>	4.0%	13.2%	12.8%	0.0%	8.9%	8.0%



# STATEWIDE – ACTIVITIES – RECREATION – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	98.7%	98.2%	98.6%	98.2%
<b>Beach/ sunbathing</b>	91.2%	90.6%	90.7%	89.9%
<b>Bodyboard</b>	23.9%	17.1%	17.2%	12.4%
<b>Standup paddle board</b>	*	*	*	3.8%
<b>Surfing</b>	12.0%	10.5%	10.3%	7.5%
<b>Canoeing/ kayak</b>	8.4%	7.0%	6.4%	5.9%
<b>Swim ocean</b>	NA	76.5%	77.6%	69.7%
<b>Snorkel</b>	NA	54.0%	55.3%	46.8%
<b>Freediving</b>	NA	NA	NA	1.0%
<b>Windsurf/ Kitesurf</b>	0.8%	0.5%	0.3%	0.3%
<b>Jet ski/ Parasail</b>	1.3%	1.2%	1.0%	0.5%
<b>Scuba</b>	5.0%	3.6%	3.1%	3.3%
<b>Fishing</b>	2.5%	2.4%	2.4%	2.2%
<b>Golf</b>	9.5%	8.0%	7.5%	9.1%

\* Combined with bodyboarding

# ACTIVITIES – RECREATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.0%	98.2%	87.2%	75.1%	98.7%	95.7%
<b>Run/ Jog/ Fitness walk</b>	34.5%	41.9%	46.2%	18.3%	35.8%	27.2%
<b>Spa</b>	5.2%	4.9%	0.0%	0.0%	3.6%	3.0%
<b>Hiking</b>	42.4%	34.3%	30.8%	0.0%	51.9%	52.5%
<b>Backpack/Camp</b>	0.7%	4.0%	0.0%	0.0%	2.8%	6.1%
<b>Agritourism</b>	9.0%	6.4%	15.4%	0.0%	19.6%	8.2%
<b>Sport event/ tournament</b>	3.9%	2.6%	0.0%	0.0%	2.2%	0.8%
<b>Park/ botanical garden</b>	37.3%	33.2%	15.4%	28.4%	44.3%	37.5%
<b>Waterpark</b>	1.8%	0.2%	0.0%	0.0%	1.1%	0.4%
<b>Mountain tube/ waterfall rappel</b>	0.3%	0.8%	0.0%	0.0%	0.9%	5.7%
<b>Zip lining</b>	1.3%	1.6%	0.0%	0.0%	2.1%	2.2%
<b>Skydiving</b>	0.4%	0.2%	0.0%	0.0%	0.2%	0.0%
<b>All terrain vehicle (ATV)</b>	3.1%	0.4%	0.0%	0.0%	2.1%	1.1%
<b>Horseback riding</b>	1.5%	0.8%	0.0%	0.0%	2.1%	1.1%

# STATEWIDE - ACTIVITIES – RECREATION – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	98.7%	98.2%	98.6%	98.2%
<b>Run/ Jog/ Fitness walk</b>	41.0%	33.1%	28.9%	37.1%
<b>Spa</b>	6.6%	6.7%	6.4%	4.8%
<b>Hiking</b>	29.3%	35.5%	52.2%	45.1%
<b>Backpack/Camp</b>	*	*	2.6%	3.0%
<b>Agritourism</b>	9.5%	12.5%	12.1%	11.6%
<b>Sport event/ tournament</b>	3.2%	3.6%	2.8%	2.9%
<b>Park/ botanical garden</b>	46.2%	43.4%	39.8%	39.7%
<b>Waterpark</b>	NA	1.6%	1.7%	1.1%
<b>Mountain tube/ waterfall rappel</b>	NA	1.5%	1.8%	1.4%
<b>Zip lining</b>	NA	3.6%	3.2%	1.8%
<b>Skydiving</b>	NA	0.4%	0.3%	0.3%
<b>All terrain vehicle (ATV)</b>	NA	2.3%	2.3%	2.0%
<b>Horseback riding</b>	NA	1.9%	1.8%	1.5%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	99.5%	99.2%	87.2%	73.4%	98.7%	95.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	17.5%	19.0%	0.0%	28.4%	19.0%	19.8%
<b>Live music/ stage show</b>	32.6%	26.4%	15.4%	0.0%	26.7%	23.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.1%	4.0%	0.0%	0.0%	6.4%	1.9%
<b>Fine dining</b>	43.3%	51.4%	28.2%	16.6%	42.1%	37.7%
<b>Family restaurant</b>	65.3%	64.7%	30.8%	18.3%	66.3%	52.5%
<b>Fast food</b>	57.7%	38.6%	15.4%	0.0%	41.0%	30.2%
<b>Food truck</b>	38.1%	30.7%	30.8%	0.0%	17.2%	37.3%
<b>Café/ coffee house</b>	50.7%	50.7%	15.4%	8.3%	56.6%	42.3%
<b>Ethnic dining</b>	27.7%	18.7%	0.0%	0.0%	20.9%	15.3%
<b>Prepared own meal</b>	48.4%	71.8%	87.2%	10.0%	75.8%	66.6%

# STATEWIDE – ACTIVITIES – ENTERTAINMENT & DINING – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	99.0%	98.6%	98.4%	98.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	27.4%	21.9%	21.2%	19.8%
<b>Live music/ stage show</b>	33.0%	33.3%	30.7%	30.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.3%	8.6%	7.2%	6.6%
<b>Fine dining</b>	47.5%	48.1%	44.8%	46.2%
<b>Family restaurant</b>	71.9%	63.4%	62.8%	64.2%
<b>Fast food</b>	44.1%	47.1%	45.0%	45.4%
<b>Food truck</b>	NA	35.2%	36.1%	32.4%
<b>Café/ coffee house</b>	54.8%	52.4%	52.1%	52.4%
<b>Ethnic dining</b>	26.5%	26.7%	25.6%	22.8%
<b>Prepared own meal</b>	69.3%	68.2%	66.8%	66.5%

## ACTIVITIES – SHOPPING – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.4%	97.9%	87.2%	53.3%	97.6%	93.3%
<b>Mall/ department store</b>	66.1%	50.9%	0.0%	0.0%	48.8%	30.8%
<b>Designer boutique</b>	18.8%	20.7%	0.0%	0.0%	16.0%	16.6%
<b>Hotel/ resort store</b>	34.0%	26.6%	0.0%	8.3%	25.3%	12.0%
<b>Swap meet/ flea market</b>	19.8%	20.6%	0.0%	8.3%	16.1%	7.8%
<b>Discount/ outlet store</b>	24.2%	29.8%	0.0%	0.0%	16.5%	12.8%
<b>Supermarket</b>	59.4%	79.9%	87.2%	8.3%	81.8%	71.2%
<b>Farmer's market</b>	27.2%	36.7%	43.6%	0.0%	60.6%	46.4%
<b>Convenience store</b>	62.0%	54.6%	59.0%	10.0%	48.2%	34.1%
<b>Duty free store</b>	8.4%	2.5%	0.0%	0.0%	2.7%	2.9%
<b>Local shop/ artisan</b>	54.6%	69.5%	59.0%	26.6%	65.7%	70.2%

# STATEWIDE – ACTIVITIES – SHOPPING – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	97.8%	97.4%	96.5%	97.5%
<b>Mall/ department store</b>	59.7%	59.1%	56.2%	54.8%
<b>Designer boutique</b>	25.4%	19.9%	18.4%	19.2%
<b>Hotel/ resort store</b>	27.5%	27.4%	28.8%	28.0%
<b>Swap meet/ flea market</b>	23.0%	17.4%	16.7%	18.6%
<b>Discount/ outlet store</b>	25.6%	22.5%	22.6%	23.4%
<b>Supermarket</b>	66.0%	73.9%	72.3%	74.7%
<b>Farmer's market</b>	42.4%	44.7%	43.1%	43.2%
<b>Convenience store</b>	50.0%	52.7%	51.9%	54.1%
<b>Duty free store</b>	5.9%	7.4%	6.5%	4.8%
<b>Local shop/ artisan</b>	71.7%	66.7%	64.7%	65.3%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	71.5%	61.5%	43.6%	10.0%	70.5%	57.5%
<b>Historic military site</b>	36.6%	2.7%	0.0%	0.0%	8.0%	5.6%
<b>Other historical site</b>	21.9%	20.1%	43.6%	10.0%	44.2%	26.8%
<b>Museum/ art gallery</b>	14.4%	18.6%	0.0%	10.0%	18.4%	14.2%
<b>Luau/ Polynesian show/ hula show</b>	29.2%	26.3%	0.0%	0.0%	25.3%	22.3%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	8.8%	5.4%	0.0%	0.0%	5.5%	4.3%
<b>Play/ concert/ theatre</b>	4.9%	4.9%	0.0%	0.0%	4.0%	1.6%
<b>Art/ craft fair</b>	7.9%	15.2%	15.4%	0.0%	16.6%	14.7%
<b>Festival event</b>	5.3%	4.0%	0.0%	0.0%	4.5%	3.5%



# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	74.7%	72.9%	69.7%	68.0%
<b>Historic military site</b>	23.6%	16.8%	16.7%	16.3%
<b>Other historical site</b>	33.1%	29.4%	26.5%	29.1%
<b>Museum/ art gallery</b>	22.8%	19.8%	17.6%	17.5%
<b>Luau/ Polynesian show/ hula show</b>	36.5%	34.4%	32.9%	28.4%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	5.1%	8.2%	7.4%	7.0%
<b>Play/ concert/ theatre</b>	6.1%	5.5%	4.4%	4.6%
<b>Art/ craft fair</b>	14.2%	14.5%	13.7%	14.0%
<b>Festival event</b>	10.4%	6.0%	5.0%	4.8%

# ACTIVITIES – TRANSPORTATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.2%	97.4%	71.8%	53.3%	95.8%	97.3%
<b>Airport shuttle</b>	27.5%	11.3%	0.0%	8.3%	16.7%	17.5%
<b>Trolley</b>	8.0%	6.2%	0.0%	0.0%	5.1%	3.1%
<b>Public bus</b>	27.1%	4.9%	12.8%	0.0%	1.3%	3.1%
<b>Tour bus/ tour van</b>	17.5%	7.7%	0.0%	8.3%	7.0%	10.3%
<b>Taxi/ limo</b>	27.6%	7.3%	12.8%	10.0%	6.6%	6.5%
<b>Rental car</b>	56.9%	89.4%	71.8%	26.6%	89.8%	86.4%
<b>Ride share</b>	22.3%	6.5%	0.0%	0.0%	7.9%	4.6%
<b>Bicycle rental</b>	4.4%	3.4%	0.0%	0.0%	2.5%	3.5%

# STATEWIDE – ACTIVITIES – TRANSPORTATION – CANADA

	2017	2018	2019	2020
<b>TOTAL</b>	97.8%	96.0%	95.3%	96.8%
<b>Airport shuttle</b>	23.8%	22.2%	18.6%	19.6%
<b>Trolley</b>	4.7%	4.5%	5.5%	6.6%
<b>Public bus</b>	12.6%	11.1%	10.4%	12.0%
<b>Tour bus/ tour van</b>	11.5%	12.4%	10.9%	11.6%
<b>Taxi/ limo</b>	17.5%	15.3%	13.0%	14.6%
<b>Rental car</b>	82.8%	81.1%	79.9%	79.8%
<b>Ride share</b>	NA	9.1%	13.7%	12.5%
<b>Bicycle rental</b>	NA	3.4%	3.2%	3.7%

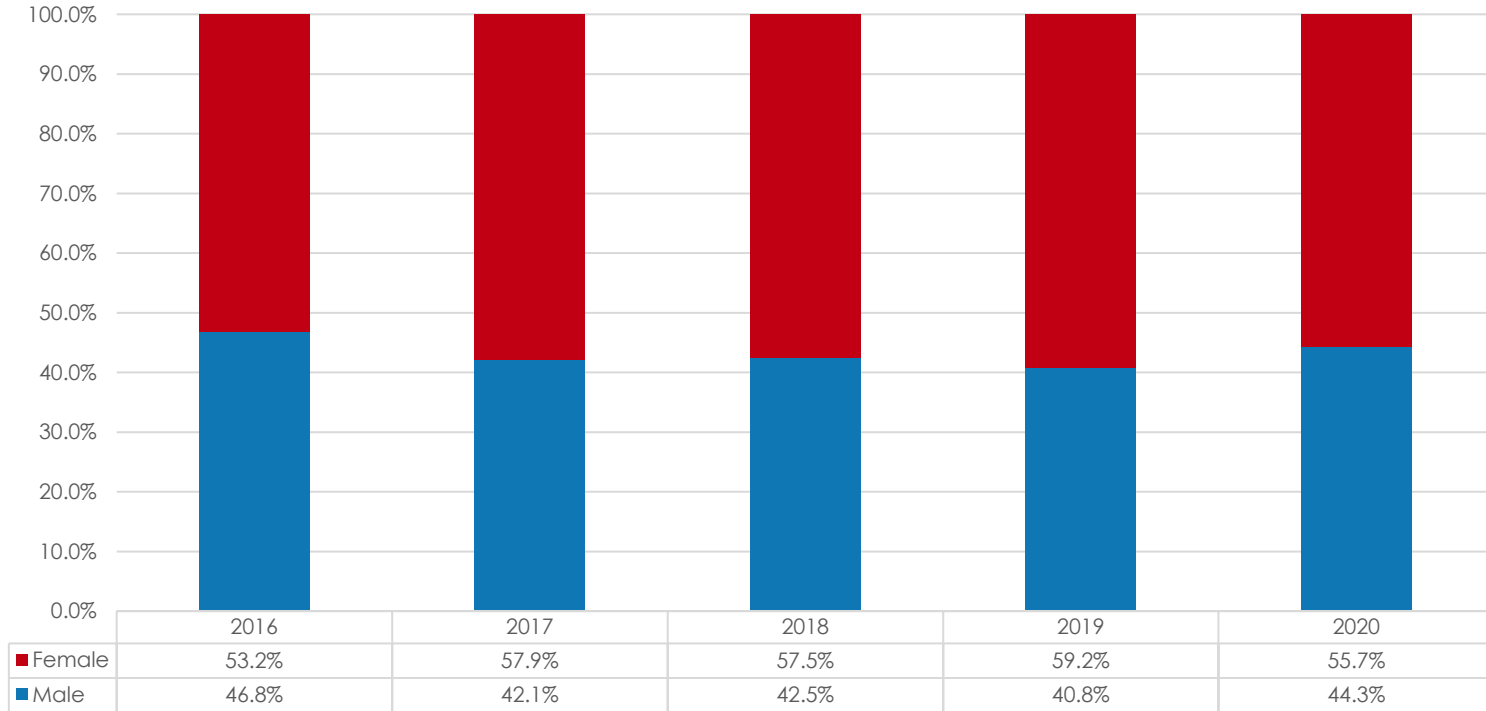
## ACTIVITIES – OTHER – CANADA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	21.8%	23.8%	15.4%	0.0%	24.1%	15.2%
<b>Visit friends/ family</b>	21.2%	23.1%	15.4%	0.0%	23.7%	12.4%
<b>Volunteer non profit</b>	0.8%	0.8%	0.0%	0.0%	0.6%	3.9%

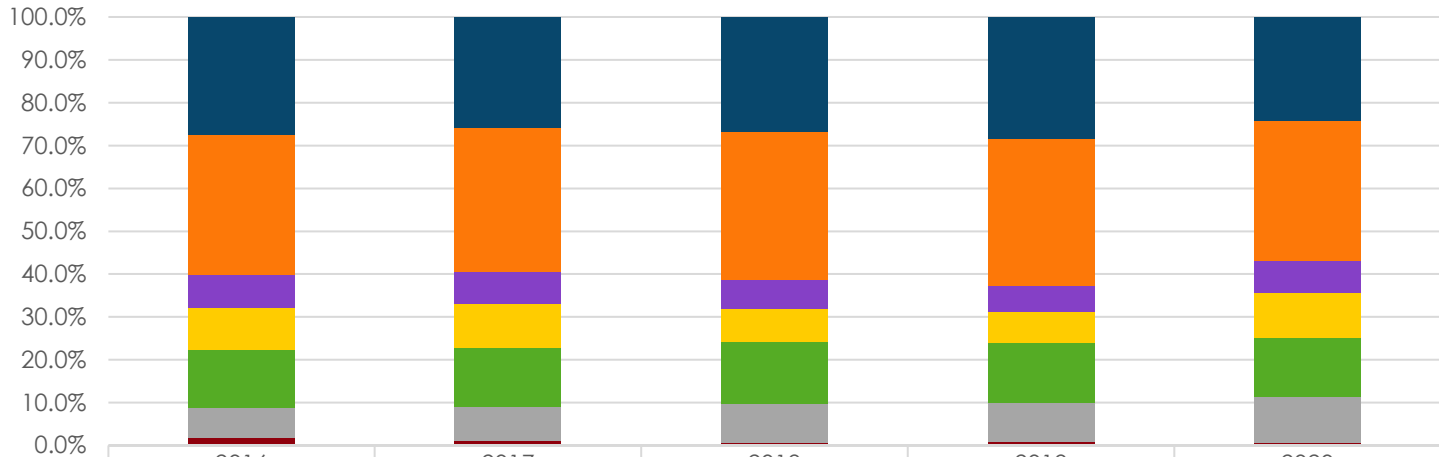
# ACTIVITIES – OTHER – CANADA

	2018	2019	2020
<b>TOTAL</b>	20.1%	18.6%	23.5%
<b>Visit friends/ family</b>	19.0%	17.9%	22.6%
<b>Volunteer non profit</b>	1.3%	0.9%	1.3%

# VISITOR PROFILE – GENDER – CANADA

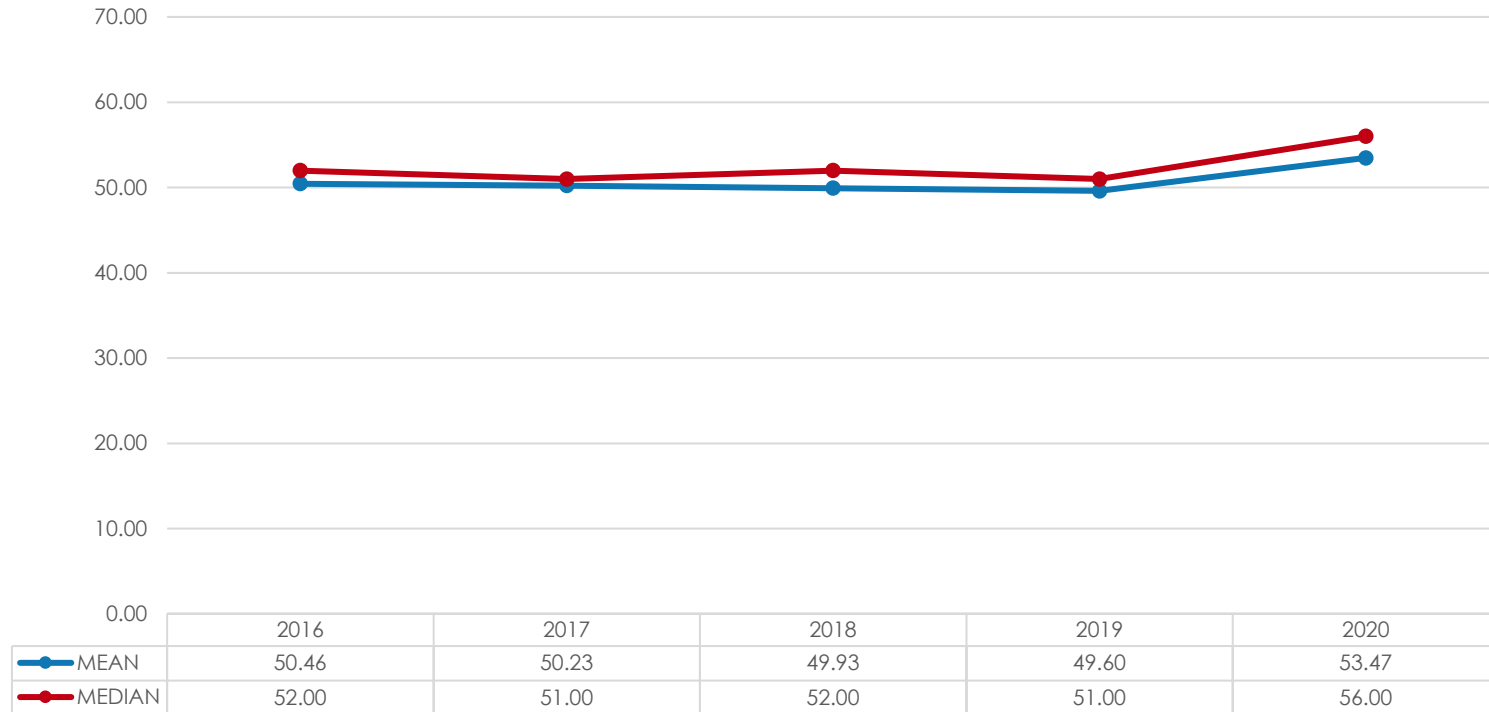


# VISITOR PROFILE – EDUCATION – CANADA



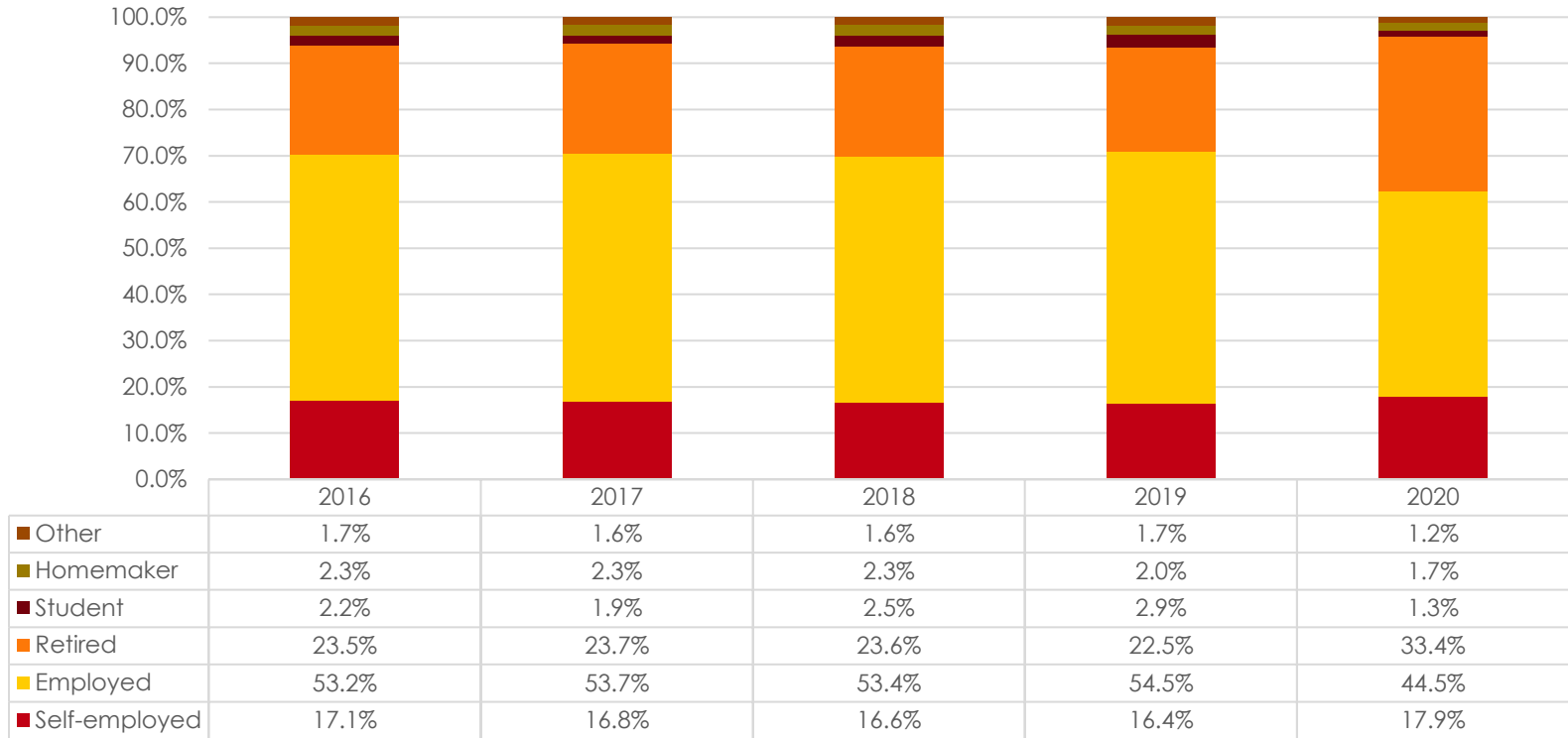
	2016	2017	2018	2019	2020
Post-Graduate	28.1%	25.8%	26.7%	28.4%	24.1%
College Grad	32.6%	33.6%	34.6%	34.3%	32.7%
Associate Degree	7.7%	7.5%	6.7%	6.1%	7.6%
Vocational/ Tech	10.0%	10.4%	7.9%	7.3%	10.4%
Some College	13.4%	13.6%	14.3%	14.0%	13.8%
H.S. Grad	7.1%	8.1%	9.2%	9.0%	10.7%
Some / No H.S.	1.7%	1.0%	0.6%	0.9%	0.7%

# VISITOR PROFILE – AGE – CANADA

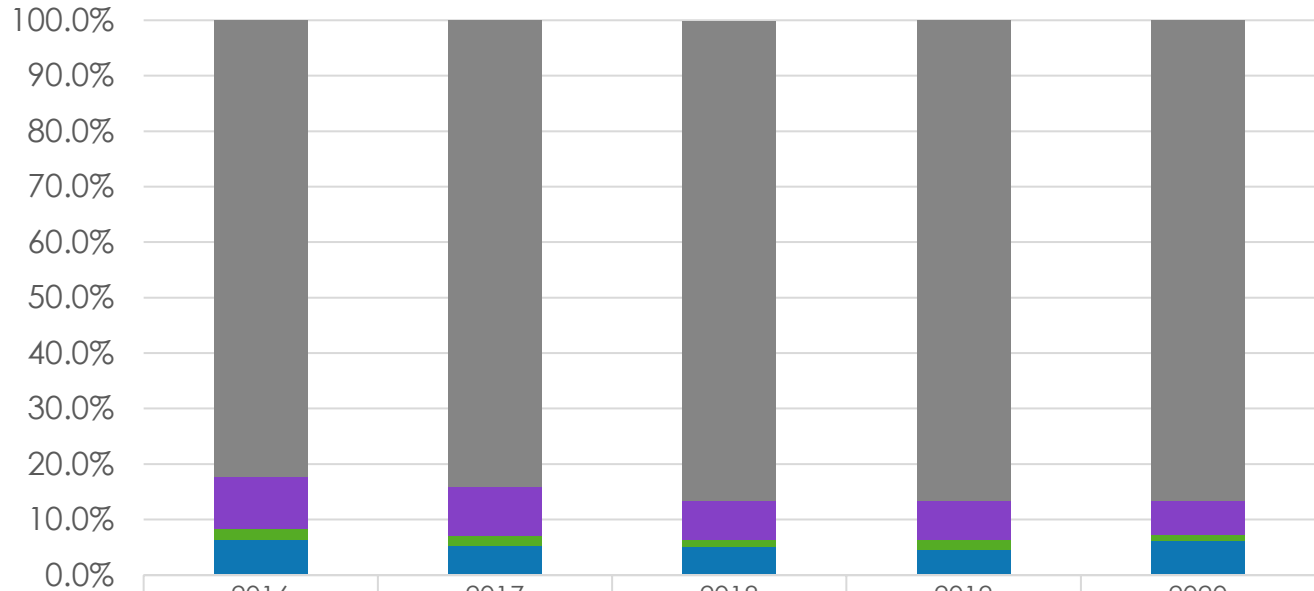




# VISITOR PROFILE – EMPLOYMENT STATUS – CANADA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – CANADA



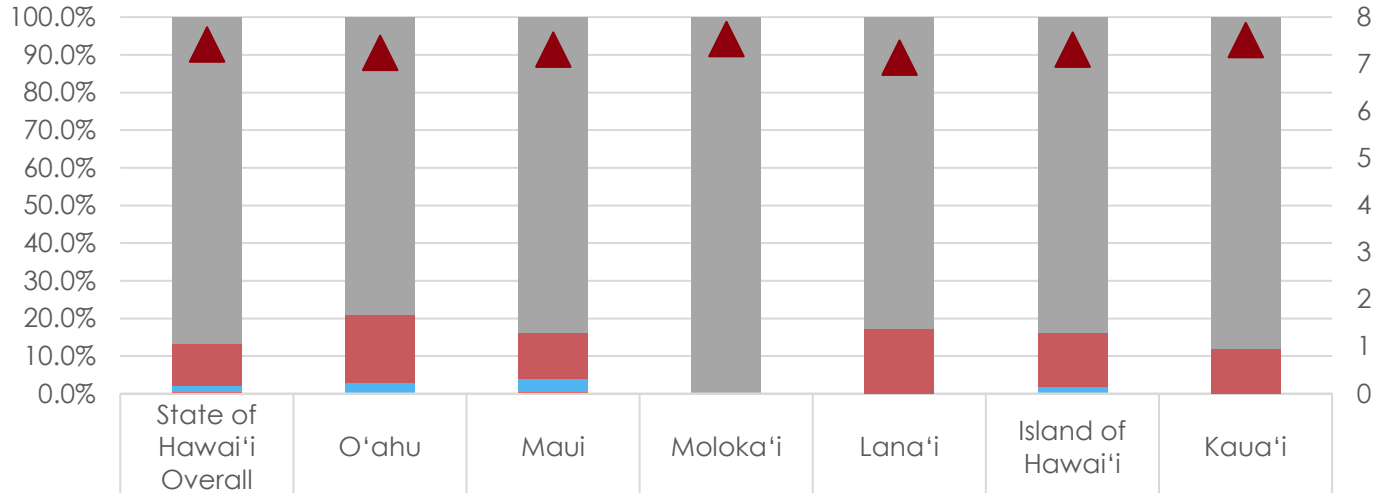
	2016	2017	2018	2019	2020
■ Do not nor plan to purchase	82.4%	84.1%	86.5%	86.6%	86.5%
■ Plan to in future	9.2%	9.0%	7.0%	7.1%	6.3%
■ Other Property Type	2.1%	1.7%	1.4%	1.7%	1.0%
■ Timeshare	6.3%	5.3%	5.0%	4.6%	6.2%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – EUROPE

# OVERALL SATISFACTION – MOST RECENT VISIT – EUROPE

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



■ Excellent (7-8)	86.6%	79.0%	83.8%	100.0%	82.7%	83.7%	88.1%
■ Above Average (5-6)	11.4%	18.2%	12.2%	0.0%	17.3%	14.6%	11.9%
■ Below Average (3-4)	1.5%	2.8%	3.5%	0.0%	0.0%	1.7%	0.0%
■ Poor (1-2)	0.5%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
BASE	343	218	144	4	6	111	49
▲ MEAN	7.42	7.24	7.31	7.53	7.14	7.31	7.51

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

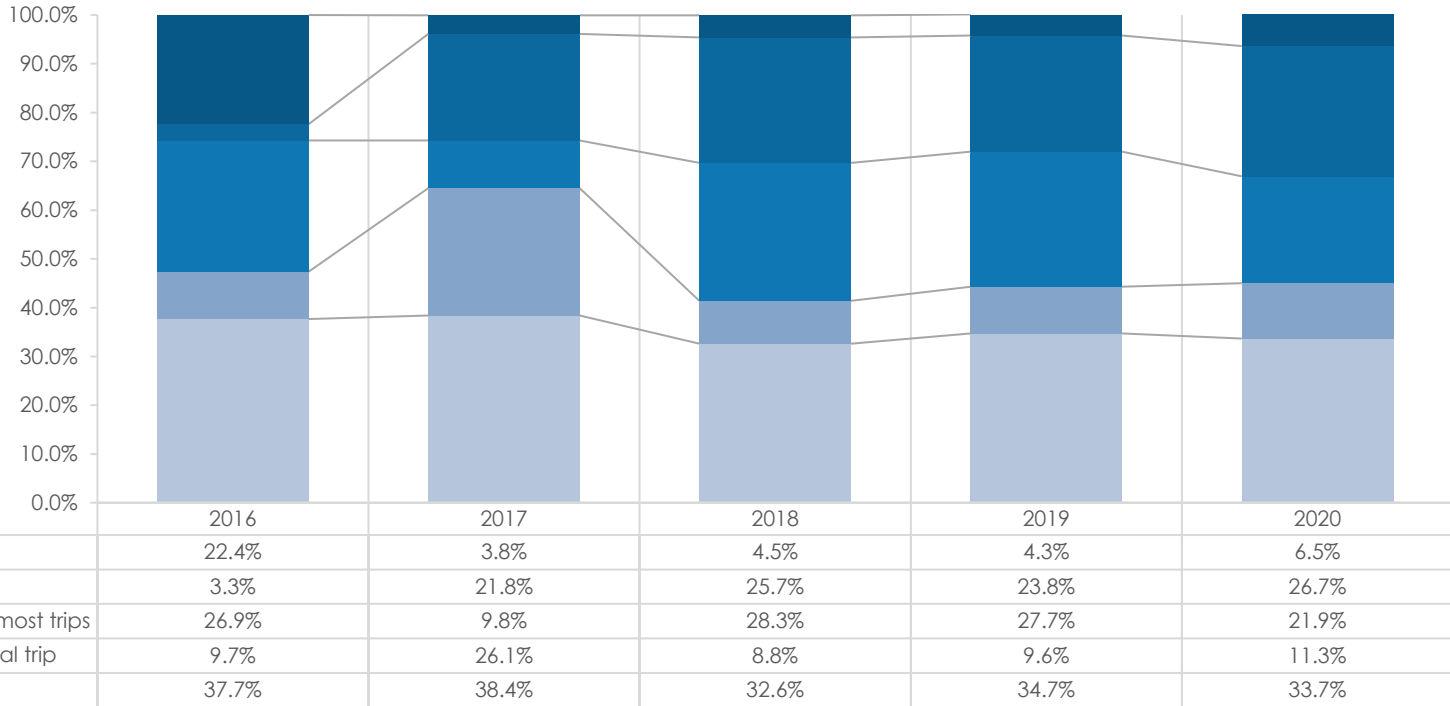
# PRIMARY TRIP PURPOSE EUROPE

	2018	2019	2020
Vacation	66.6%	67.2%	68.8%
Visit friends/ relatives	4.2%	4.6%	7.4%
Convention, conference, seminar	3.4%	1.7%	5.8%
Incentive trip	0.7%	1.3%	5.7%
Honeymoon	8.3%	8.2%	4.7%
Anniversary/ birthday	5.7%	6.3%	1.9%
Corporate meeting	-	0.0%	1.4%
Get married/ renew vows	1.1%	0.8%	1.3%
Other business	1.7%	1.4%	1.1%

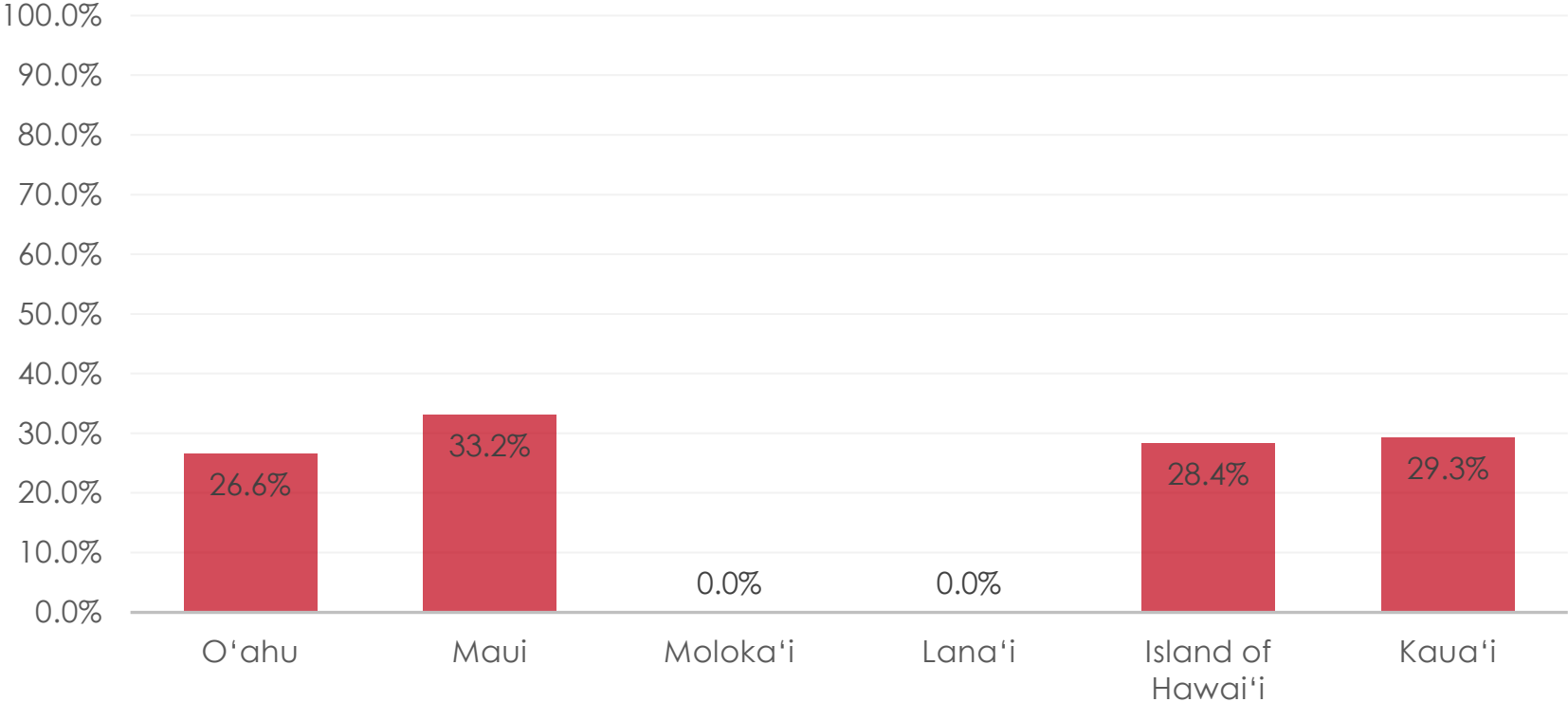
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE EUROPE

	2018	2019	2020
Vacation	86.5%	87.9%	86.1%
Visit friends/ relatives	8.7%	8.7%	14.2%
Incentive trip	1.5%	1.7%	8.0%
Convention, conference, seminar	4.1%	2.2%	7.2%
Honeymoon	9.8%	9.2%	6.8%
Anniversary/ birthday	12.4%	13.2%	4.1%
Corporate meeting	-	0.0%	2.3%
Other business	2.2%	1.8%	2.2%
Sporting event	2.2%	2.6%	1.6%

# VACATION TRIP DESCRIPTION – EUROPE



# ADVERTISING AWARENESS – EUROPE

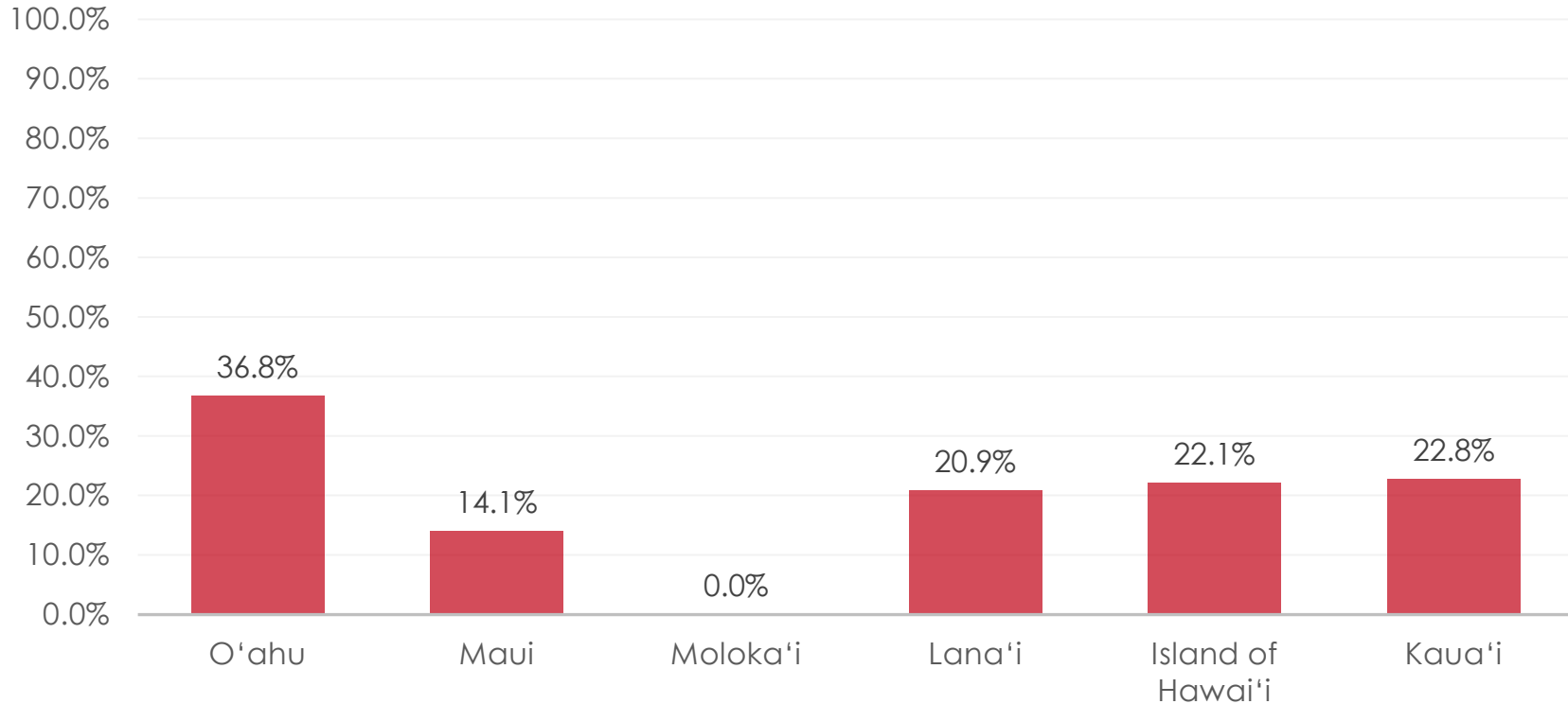


256 Q. Do you remember seeing or hearing advertising for \_\_\_ prior to your arrival?

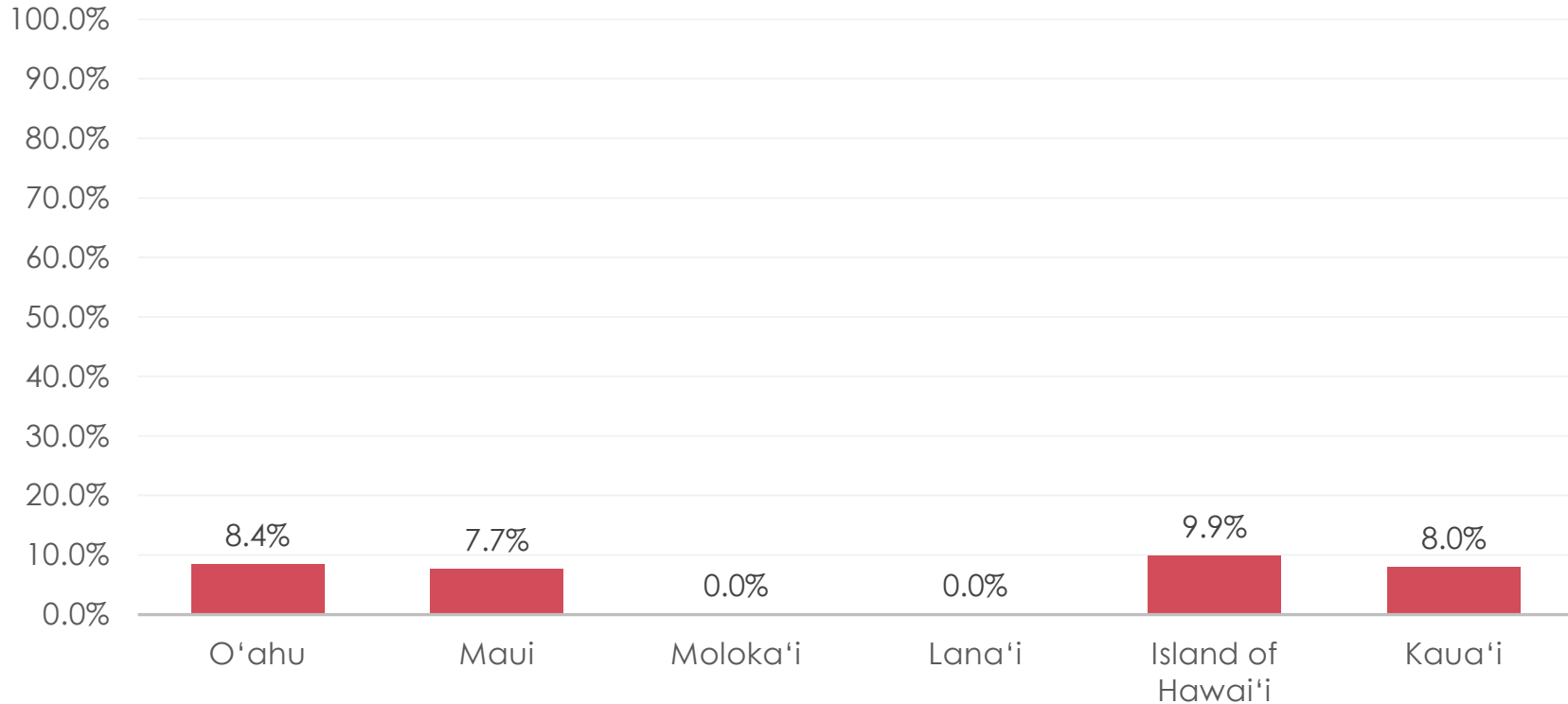




# IMPACT OF LOCATION FILMING – EUROPE

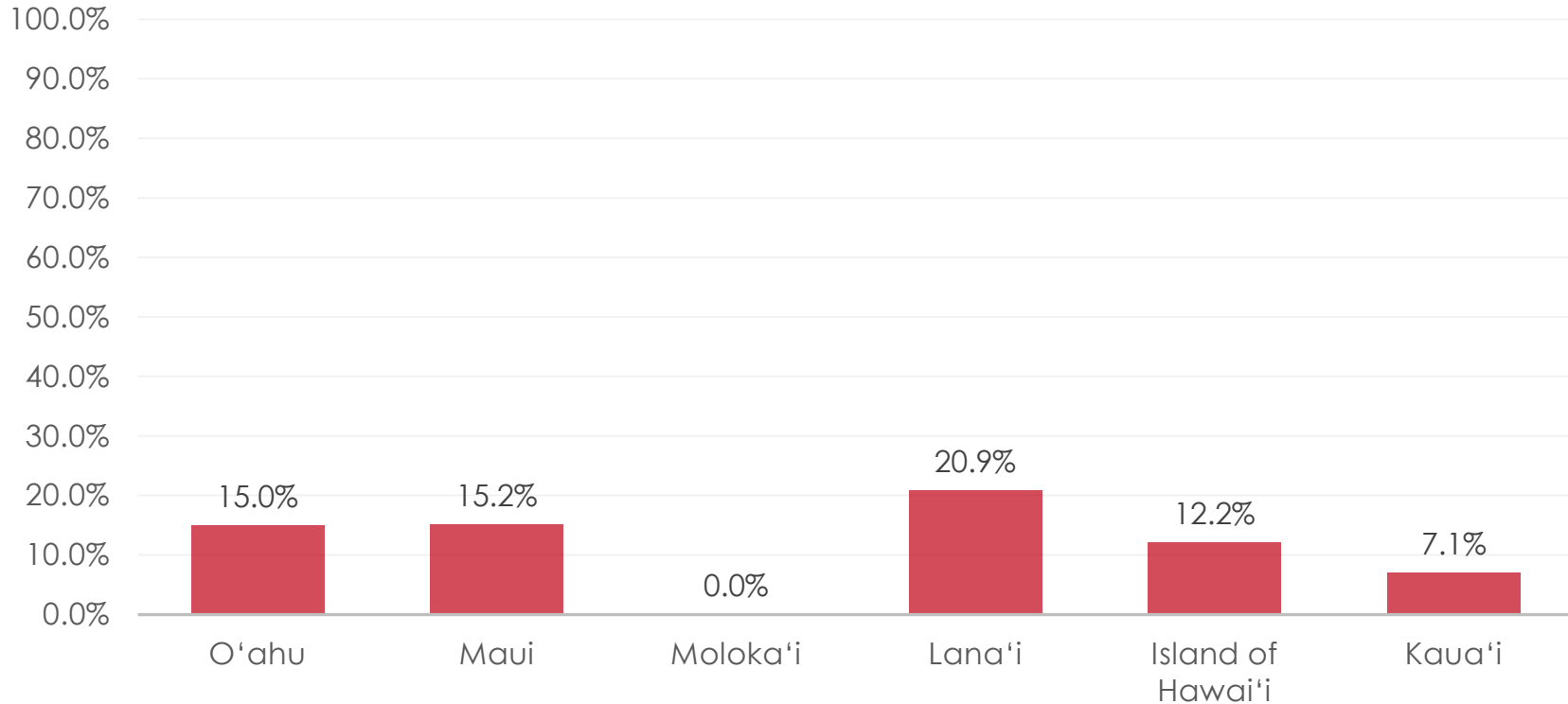


# IMPACT OF HAWAIIAN MUSIC – EUROPE

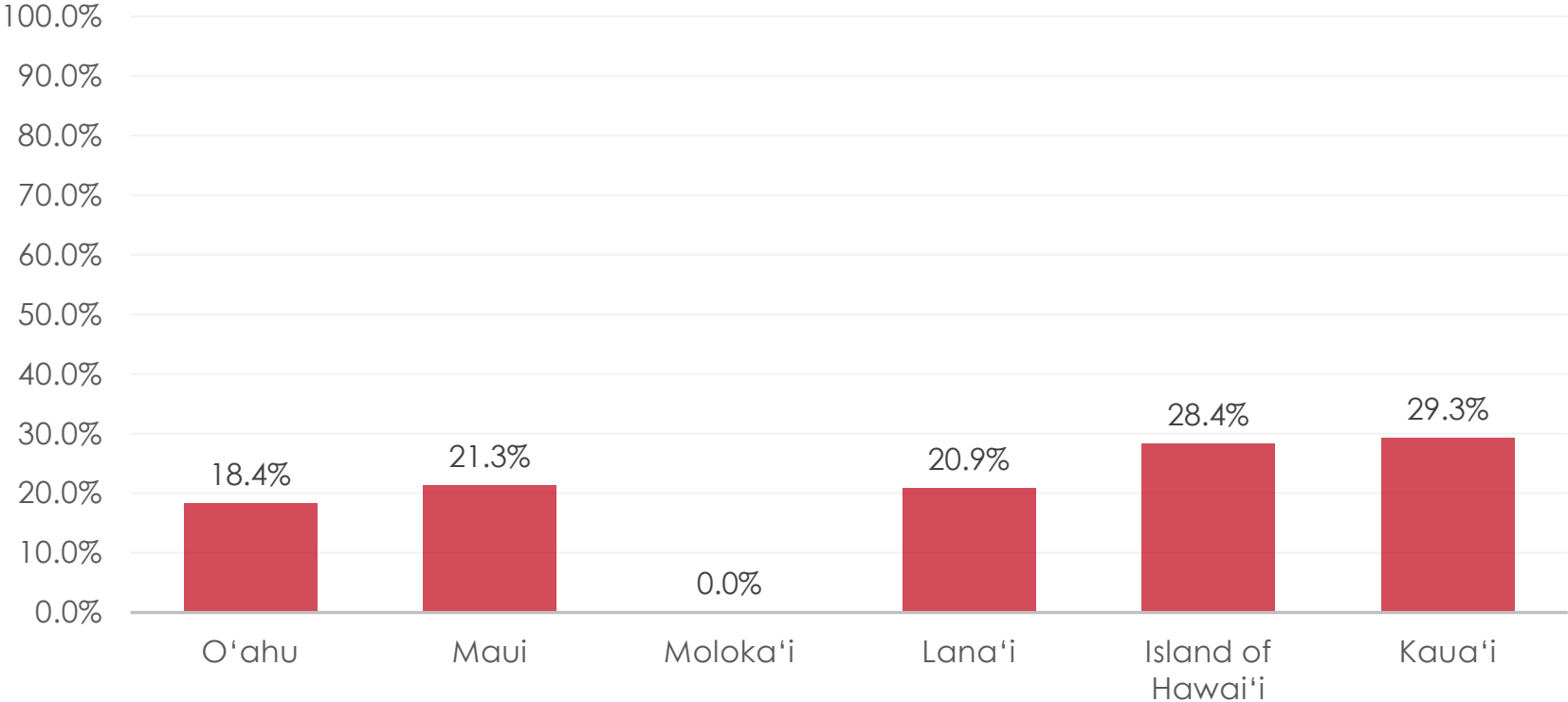


258 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

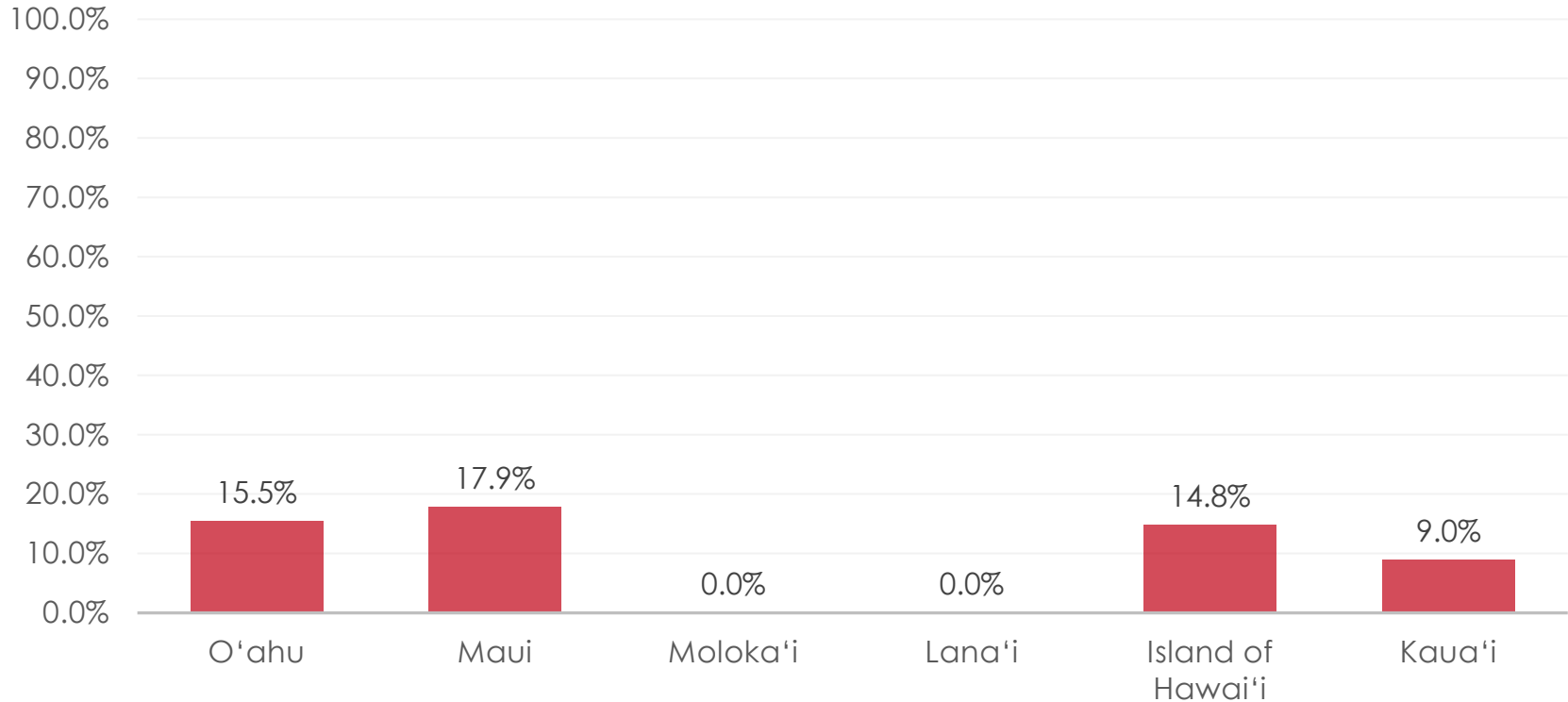
# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS– EUROPE



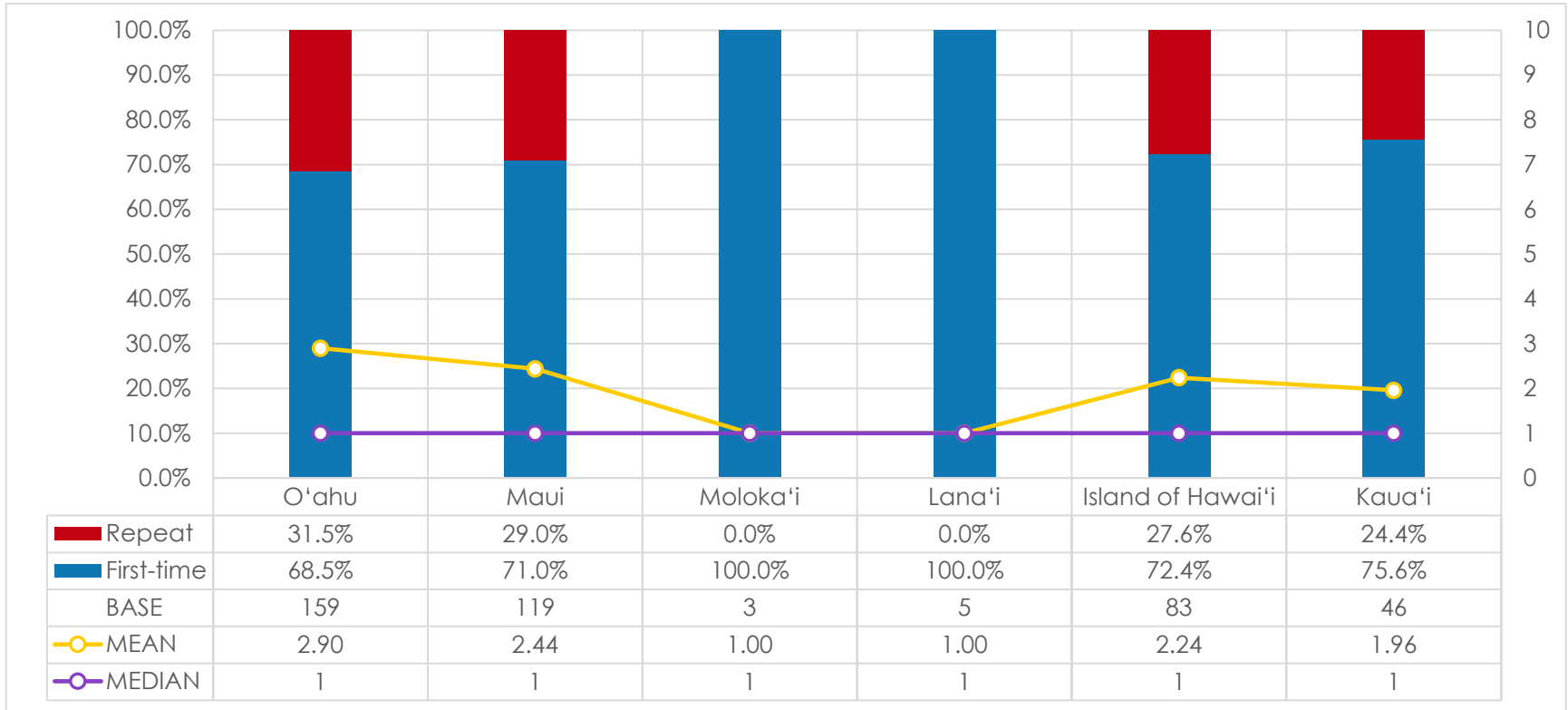
# IMPACT OF OUTDOOR/ SPORTING EVENTS– EUROPE



# IMPACT OF HAWAIIAN CULTURAL EVENTS – EUROPE



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – EUROPE

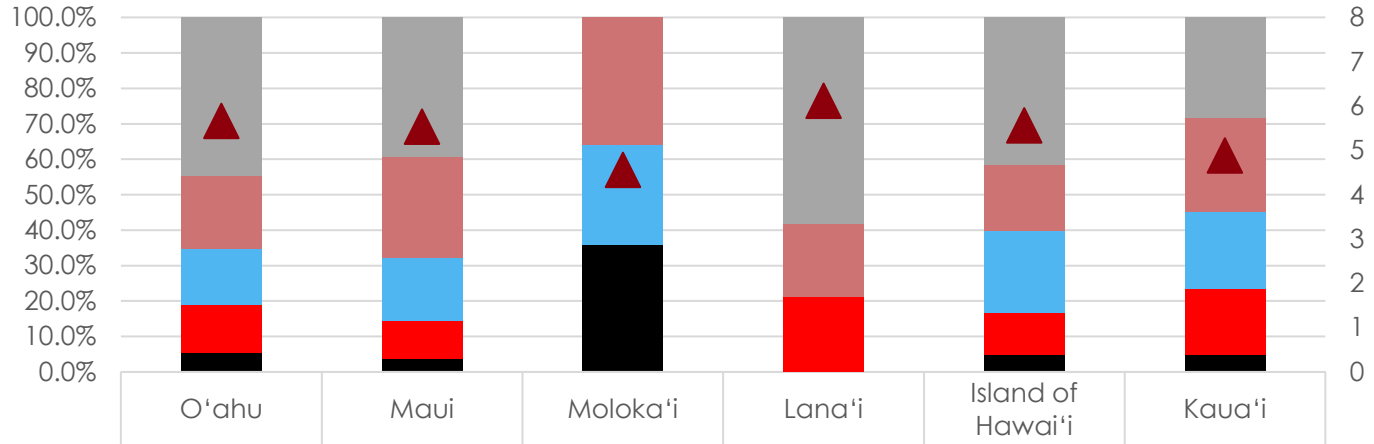


# TRAVEL PARTY MEMBERS – EUROPE

	2016	2017	2018	2019	2020
<b>Spouse</b>	55.5%	52.8%	51.4%	50.7%	48.6%
<b>Friends/ associates</b>	15.3%	15.5%	14.1%	15.7%	18.9%
<b>Other adult family</b>	14.7%	16.7%	17.1%	19.3%	17.1%
<b>Alone</b>	13.8%	13.4%	13.4%	11.8%	14.2%
<b>Girlfriend/ boyfriend</b>	11.5%	11.1%	12.0%	13.8%	10.5%
<b>Child under 18</b>	12.8%	11.6%	14.1%	14.7%	6.8%
<b>Same sex partner</b>	.6%	1.6%	1.7%	1.5%	2.0%

# LIKELIHOOD OF RETURN VISIT – EUROPE

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

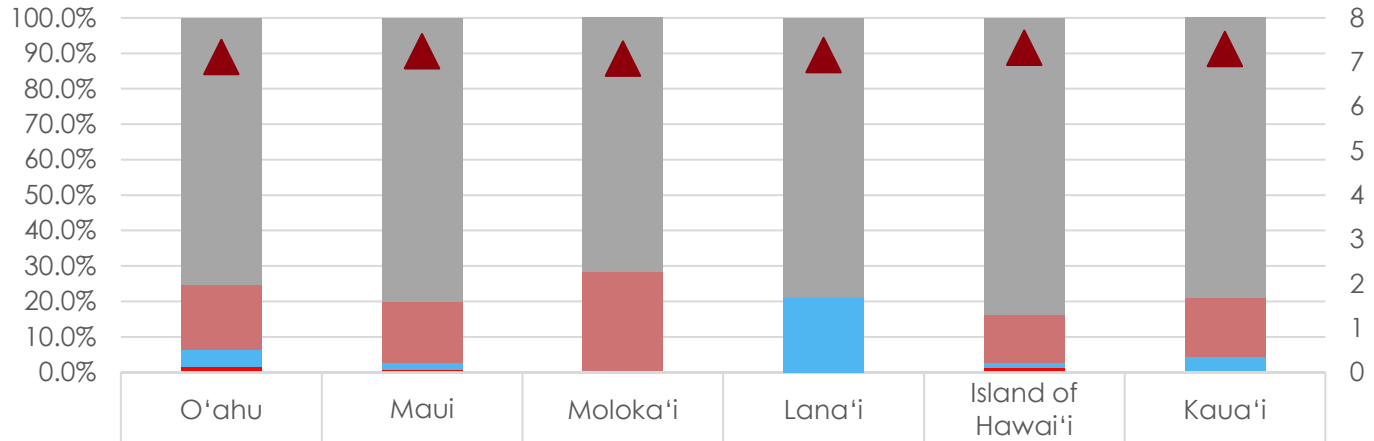


■ Very likely (7-8)	44.7%	39.4%	0.0%	58.2%	41.6%	28.3%
■ Somewhat likely (5-6)	20.5%	28.4%	35.9%	20.9%	18.4%	26.6%
■ Somewhat unlikely (3-4)	15.9%	17.9%	28.3%	0.0%	23.4%	21.8%
■ Very unlikely (1-2)	13.5%	10.7%	0.0%	20.9%	11.6%	18.6%
■ Not sure	5.4%	3.7%	35.9%	0.0%	5.0%	4.8%
BASE	158	118	3	5	83	46
▲ MEAN	5.66	5.53	4.56	6.12	5.56	4.88



# BRAND/DESTINATION ADVOCACY – EUROPE

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



■ Very likely (7-8)	75.2%	80.0%	71.7%	79.1%	83.7%	79.1%
■ Somewhat likely (5-6)	18.5%	17.2%	28.3%	0.0%	13.7%	16.6%
■ Somewhat unlikely (3-4)	4.8%	1.8%	0.0%	20.9%	1.3%	4.4%
■ Very unlikely (1-2)	1.4%	0.9%	0.0%	0.0%	1.3%	0.0%
■ Not sure	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	158	118	3	5	83	45
▲ MEAN	7.12	7.25	7.08	7.16	7.33	7.30

265 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

# ACTIVITIES – SIGHTSEEING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	92.5%	94.1%	100.0%	83.5%	96.3%	96.2%
<b>On own (self guided)</b>	52.7%	76.5%	64.1%	20.9%	77.4%	68.9%
<b>Helicopter/ airplane</b>	1.8%	11.0%	35.9%	0.0%	5.8%	18.5%
<b>Boat/ submarine/ whale</b>	25.6%	48.7%	35.9%	41.8%	23.9%	38.9%
<b>Visit towns</b>	42.3%	51.5%	0.0%	0.0%	45.9%	35.9%
<b>Limo/ van/ bus tour</b>	26.6%	7.9%	0.0%	20.9%	9.0%	14.1%
<b>Scenic views/ natural landmark</b>	53.3%	60.6%	28.3%	0.0%	65.1%	60.7%
<b>Movie/ TV/ film location</b>	11.3%	1.6%	0.0%	0.0%	2.4%	11.7%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	98.0%	95.7%	96.0%	94.6%
<b>On own (self guided)</b>	75.5%	72.3%	73.2%	67.2%
<b>Helicopter/ airplane</b>	16.8%	15.0%	14.1%	8.3%
<b>Boat/ submarine/ whale</b>	32.1%	26.6%	26.7%	38.0%
<b>Visit towns</b>	26.7%	46.3%	43.9%	47.2%
<b>Limo/ van/ bus tour</b>	23.1%	21.3%	17.8%	18.6%
<b>Scenic views/ natural landmark</b>	75.8%	64.4%	62.6%	60.1%
<b>Movie/ TV/ film location</b>	9.9%	7.8%	7.5%	8.0%

# ACTIVITIES – RECREATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	94.0%	96.7%	100.0%	100.0%	94.7%	95.6%
<b>Beach/ sunbathing</b>	77.9%	76.5%	64.1%	58.2%	66.6%	73.3%
<b>Bodyboard</b>	5.2%	1.5%	0.0%	0.0%	5.0%	10.7%
<b>Standup paddle board</b>	8.1%	1.5%	0.0%	0.0%	0.0%	4.4%
<b>Surfing</b>	8.7%	4.2%	0.0%	0.0%	5.0%	9.2%
<b>Canoeing/ kayak</b>	2.5%	7.0%	0.0%	0.0%	8.7%	8.7%
<b>Swim ocean</b>	56.7%	66.8%	28.3%	20.9%	59.5%	54.8%
<b>Snorkel</b>	25.9%	40.6%	28.3%	37.3%	32.0%	33.0%
<b>Freediving</b>	0.0%	1.6%	35.9%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	2.3%	4.4%	0.0%	0.0%	3.4%	0.0%
<b>Fishing</b>	1.2%	0.9%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	1.6%	1.6%	0.0%	0.0%	3.7%	5.8%

# STATEWIDE - ACTIVITIES – RECREATION – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	97.5%	96.5%	96.9%	96.4%
<b>Beach/ sunbathing</b>	88.5%	86.3%	85.2%	77.1%
<b>Bodyboard</b>	15.5%	12.5%	12.7%	5.3%
<b>Standup paddle board</b>	*	*	*	4.9%
<b>Surfing</b>	12.9%	12.1%	12.3%	7.6%
<b>Canoeing/ kayak</b>	7.1%	7.9%	6.9%	6.9%
<b>Swim ocean</b>	NA	69.5%	72.0%	62.8%
<b>Snorkel</b>	NA	43.8%	47.1%	36.2%
<b>Freediving</b>	NA	NA	NA	0.9%
<b>Windsurf/ Kitesurf</b>	1.5%	1.1%	1.2%	0.5%
<b>Jet ski/ Parasail</b>	0.9%	0.7%	0.9%	0.0%
<b>Scuba</b>	5.7%	3.8%	3.6%	3.1%
<b>Fishing</b>	1.3%	1.3%	0.9%	0.9%
<b>Golf</b>	4.4%	2.4%	3.0%	3.0%

# ACTIVITIES – RECREATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	94.0%	96.7%	100.0%	100.0%	94.7%	95.6%
<b>Run/ Jog/ Fitness walk</b>	27.0%	24.5%	0.0%	0.0%	17.6%	8.2%
<b>Spa</b>	5.1%	10.7%	0.0%	0.0%	2.1%	2.4%
<b>Hiking</b>	34.1%	34.2%	64.1%	0.0%	45.7%	41.7%
<b>Backpack/Camp</b>	0.5%	2.6%	0.0%	0.0%	2.4%	1.9%
<b>Agritourism</b>	7.9%	2.8%	0.0%	0.0%	15.2%	6.8%
<b>Sport event/ tournament</b>	1.6%	0.9%	0.0%	0.0%	1.0%	0.0%
<b>Park/ botanical garden</b>	30.4%	31.4%	0.0%	20.9%	50.7%	33.0%
<b>Waterpark</b>	1.2%	0.7%	0.0%	0.0%	1.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.0%	1.8%	0.0%	0.0%	3.7%	4.4%
<b>Zip lining</b>	1.2%	0.0%	0.0%	0.0%	2.4%	1.9%
<b>Skydiving</b>	0.7%	0.0%	0.0%	0.0%	1.3%	0.0%
<b>All terrain vehicle (ATV)</b>	4.1%	2.8%	0.0%	0.0%	2.6%	3.8%
<b>Horseback riding</b>	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	97.5%	96.5%	96.9%	96.4%
<b>Run/ Jog/ Fitness walk</b>	29.4%	19.1%	17.0%	24.4%
<b>Spa</b>	8.0%	5.6%	6.2%	6.9%
<b>Hiking</b>	26.3%	26.9%	47.0%	38.0%
<b>Backpack/Camp</b>	*	*	3.1%	2.0%
<b>Agritourism</b>	8.4%	10.5%	9.2%	8.9%
<b>Sport event/ tournament</b>	3.7%	2.4%	2.5%	1.3%
<b>Park/ botanical garden</b>	43.3%	40.9%	39.3%	36.9%
<b>Waterpark</b>	NA	3.1%	1.7%	1.1%
<b>Mountain tube/ waterfall rappel</b>	NA	3.8%	3.6%	1.8%
<b>Zip lining</b>	NA	3.0%	2.3%	1.4%
<b>Skydiving</b>	NA	0.8%	0.8%	0.6%
<b>All terrain vehicle (ATV)</b>	NA	3.3%	2.3%	3.4%
<b>Horseback riding</b>	NA	1.7%	1.8%	0.6%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.1%	97.4%	100.0%	79.1%	98.7%	93.2%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	28.6%	26.2%	64.1%	58.2%	29.1%	29.1%
<b>Live music/ stage show</b>	29.2%	25.9%	0.0%	0.0%	11.8%	21.8%
<b>Nightclub/ dancing/ bar/ karaoke</b>	12.9%	7.4%	0.0%	0.0%	5.3%	3.8%
<b>Fine dining</b>	44.8%	46.9%	0.0%	0.0%	37.3%	21.8%
<b>Family restaurant</b>	38.9%	31.0%	0.0%	0.0%	43.3%	42.2%
<b>Fast food</b>	47.2%	34.3%	0.0%	0.0%	35.7%	22.9%
<b>Food truck</b>	24.8%	23.0%	64.1%	0.0%	17.6%	22.3%
<b>Café/ coffee house</b>	52.3%	45.9%	64.1%	20.9%	55.9%	39.3%
<b>Ethnic dining</b>	20.8%	16.5%	0.0%	0.0%	16.5%	11.7%
<b>Prepared own meal</b>	25.1%	39.2%	35.9%	0.0%	52.9%	48.0%



# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	98.5%	97.1%	97.3%	97.3%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	35.7%	29.9%	29.6%	31.9%
<b>Live music/ stage show</b>	31.8%	30.7%	29.0%	28.4%
<b>Nightclub/ dancing/ bar/ karaoke</b>	10.3%	8.1%	8.3%	10.1%
<b>Fine dining</b>	44.6%	40.6%	39.7%	43.8%
<b>Family restaurant</b>	55.5%	48.8%	47.8%	40.8%
<b>Fast food</b>	46.6%	46.4%	45.2%	40.8%
<b>Food truck</b>	NA	25.9%	32.3%	23.6%
<b>Café/ coffee house</b>	54.1%	53.0%	52.3%	50.5%
<b>Ethnic dining</b>	21.2%	18.6%	20.7%	18.5%
<b>Prepared own meal</b>	42.9%	37.6%	39.7%	39.0%

## ACTIVITIES – SHOPPING – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.5%	95.8%	100.0%	20.9%	94.7%	93.2%
<b>Mall/ department store</b>	59.6%	45.3%	0.0%	0.0%	41.7%	24.6%
<b>Designer boutique</b>	16.2%	11.0%	0.0%	0.0%	4.7%	12.6%
<b>Hotel/ resort store</b>	34.8%	31.6%	0.0%	0.0%	15.7%	16.0%
<b>Swap meet/ flea market</b>	7.7%	6.8%	0.0%	0.0%	1.3%	3.8%
<b>Discount/ outlet store</b>	17.3%	14.8%	0.0%	0.0%	16.0%	8.7%
<b>Supermarket</b>	59.4%	68.2%	0.0%	20.9%	75.0%	69.3%
<b>Farmer's market</b>	22.8%	19.1%	71.7%	20.9%	46.1%	33.0%
<b>Convenience store</b>	42.2%	30.9%	0.0%	0.0%	25.5%	30.2%
<b>Duty free store</b>	8.8%	6.5%	0.0%	0.0%	3.1%	2.4%
<b>Local shop/ artisan</b>	47.3%	55.2%	64.1%	20.9%	65.9%	71.4%

# STATEWIDE - ACTIVITIES – SHOPPING – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	96.7%	95.6%	95.9%	94.7%
<b>Mall/ department store</b>	63.5%	58.6%	55.5%	52.0%
<b>Designer boutique</b>	19.6%	17.7%	14.2%	13.6%
<b>Hotel/ resort store</b>	29.0%	30.7%	27.0%	30.2%
<b>Swap meet/ flea market</b>	11.9%	6.7%	6.0%	6.8%
<b>Discount/ outlet store</b>	24.5%	20.0%	17.9%	16.5%
<b>Supermarket</b>	64.1%	70.2%	69.5%	68.6%
<b>Farmer's market</b>	29.9%	28.9%	30.5%	30.6%
<b>Convenience store</b>	33.4%	36.0%	35.6%	36.3%
<b>Duty free store</b>	6.4%	6.9%	6.0%	6.9%
<b>Local shop/ artisan</b>	62.8%	59.1%	58.9%	58.7%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	82.2%	57.6%	35.9%	20.9%	73.2%	63.2%
<b>Historic military site</b>	62.1%	3.5%	0.0%	0.0%	19.2%	7.3%
<b>Other historical site</b>	26.7%	14.9%	35.9%	20.9%	45.9%	34.0%
<b>Museum/ art gallery</b>	18.2%	13.8%	0.0%	0.0%	21.0%	8.2%
<b>Luau/ Polynesian show/ hula show</b>	29.6%	20.4%	0.0%	0.0%	18.4%	25.3%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.9%	6.6%	0.0%	0.0%	2.4%	1.9%
<b>Play/ concert/ theatre</b>	6.2%	5.1%	0.0%	0.0%	1.0%	2.4%
<b>Art/ craft fair</b>	5.9%	9.9%	0.0%	0.0%	12.6%	6.8%
<b>Festival event</b>	3.7%	4.9%	0.0%	0.0%	4.4%	0.0%

## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	77.3%	74.8%	71.1%	75.4%
<b>Historic military site</b>	43.2%	33.2%	30.3%	33.9%
<b>Other historical site</b>	34.1%	29.5%	28.5%	30.4%
<b>Museum/ art gallery</b>	19.2%	15.5%	16.0%	18.6%
<b>Luau/ Polynesian show/ hula show</b>	36.2%	34.2%	30.4%	27.8%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	5.7%	8.1%	7.4%	5.4%
<b>Play/ concert/ theatre</b>	4.8%	5.5%	3.6%	5.3%
<b>Art/ craft fair</b>	7.6%	9.0%	7.1%	9.3%
<b>Festival event</b>	8.1%	4.7%	4.4%	4.5%

# ACTIVITIES – TRANSPORTATION – EUROPE

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.1%	97.6%	100.0%	79.1%	95.3%	98.1%
<b>Airport shuttle</b>	24.7%	22.6%	0.0%	16.5%	11.0%	16.6%
<b>Trolley</b>	6.3%	0.0%	0.0%	0.0%	4.4%	2.4%
<b>Public bus</b>	25.1%	6.3%	0.0%	0.0%	5.8%	2.4%
<b>Tour bus/ tour van</b>	28.8%	11.4%	0.0%	41.8%	7.4%	20.9%
<b>Taxi/ limo</b>	32.2%	12.7%	0.0%	0.0%	14.2%	11.2%
<b>Rental car</b>	34.5%	78.1%	64.1%	20.9%	83.2%	72.3%
<b>Ride share</b>	24.6%	15.7%	0.0%	0.0%	6.0%	7.3%
<b>Bicycle rental</b>	1.2%	2.4%	35.9%	0.0%	2.1%	2.4%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – EUROPE

	2017	2018	2019	2020
<b>TOTAL</b>	98.0%	94.4%	95.2%	95.1%
<b>Airport shuttle</b>	31.7%	26.8%	21.4%	23.2%
<b>Trolley</b>	7.8%	7.2%	5.5%	4.4%
<b>Public bus</b>	19.8%	18.7%	15.7%	14.8%
<b>Tour bus/ tour van</b>	18.2%	20.3%	18.0%	20.7%
<b>Taxi/ limo</b>	31.6%	25.9%	21.8%	24.0%
<b>Rental car</b>	66.5%	62.4%	64.8%	60.4%
<b>Ride share</b>	NA	11.9%	17.6%	17.8%
<b>Bicycle rental</b>	NA	3.3%	3.2%	2.6%

## ACTIVITIES – OTHER – EUROPE

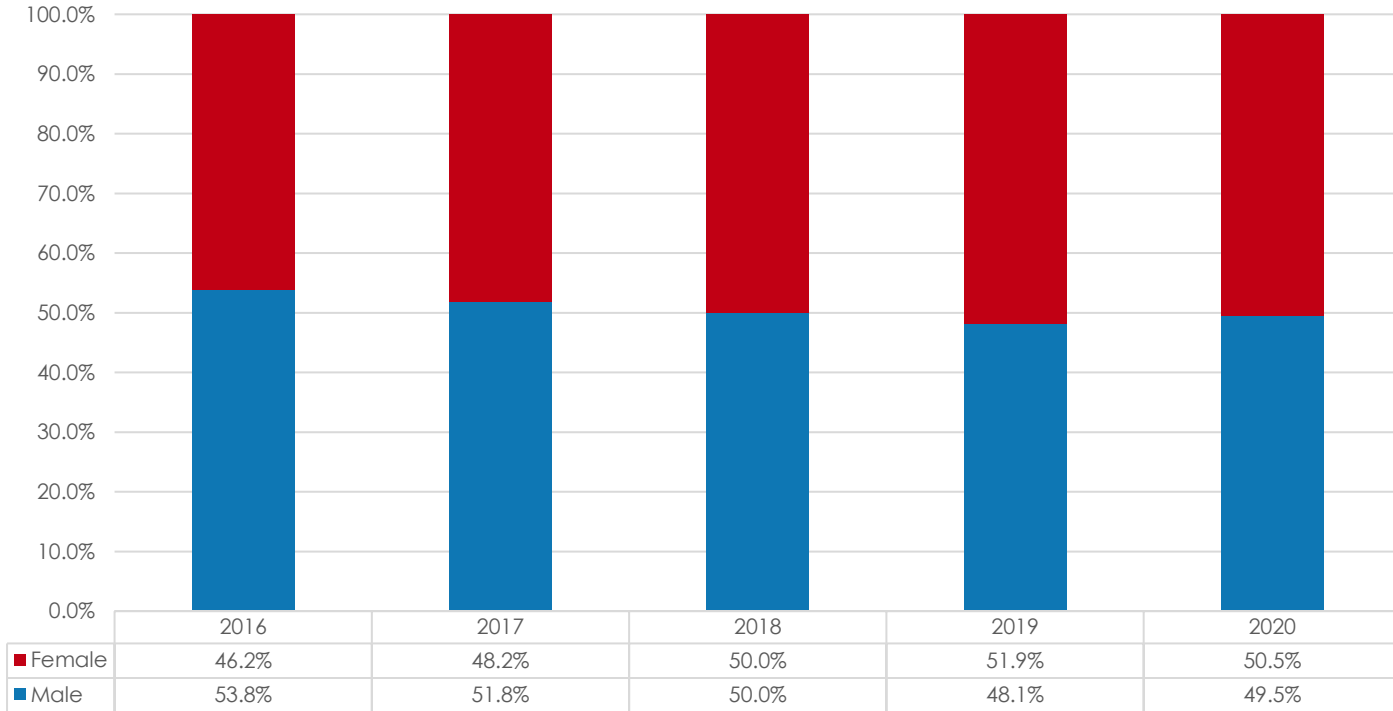
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWA'I	KAUA'I
<b>TOTAL</b>	21.3%	13.2%	0.0%	0.0%	14.6%	8.7%
<b>Visit friends/ family</b>	20.7%	11.3%	0.0%	0.0%	12.6%	8.7%
<b>Volunteer non profit</b>	1.8%	1.8%	0.0%	0.0%	2.1%	0.0%



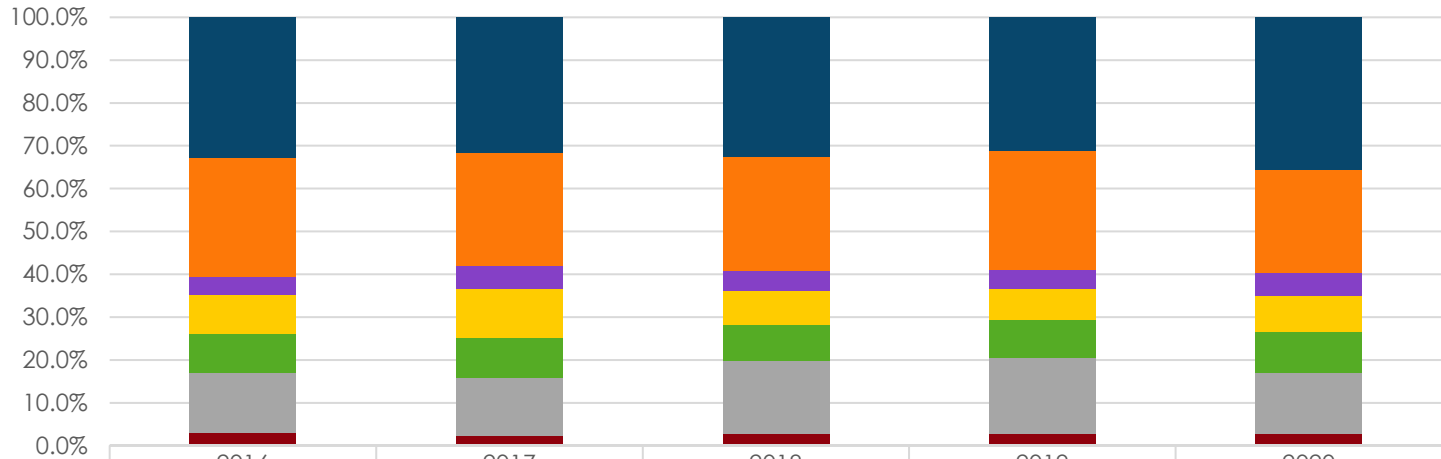
## ACTIVITIES – OTHER – EUROPE

	2018	2019	2020
TOTAL	15.5%	14.9%	18.7%
Visit friends/ family	13.4%	12.9%	17.5%
Volunteer non profit	2.3%	2.1%	1.7%

# VISITOR PROFILE – GENDER – EUROPE

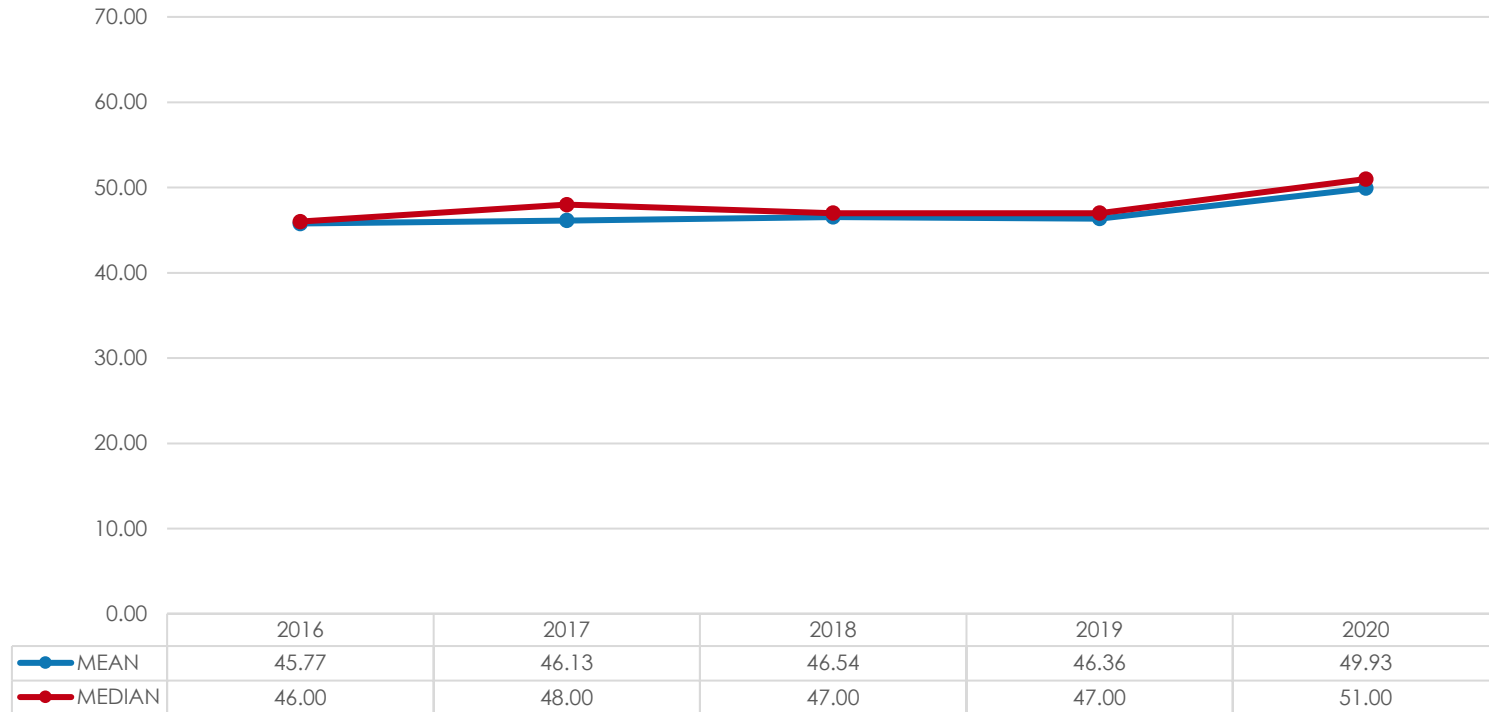


# VISITOR PROFILE – EDUCATION – EUROPE

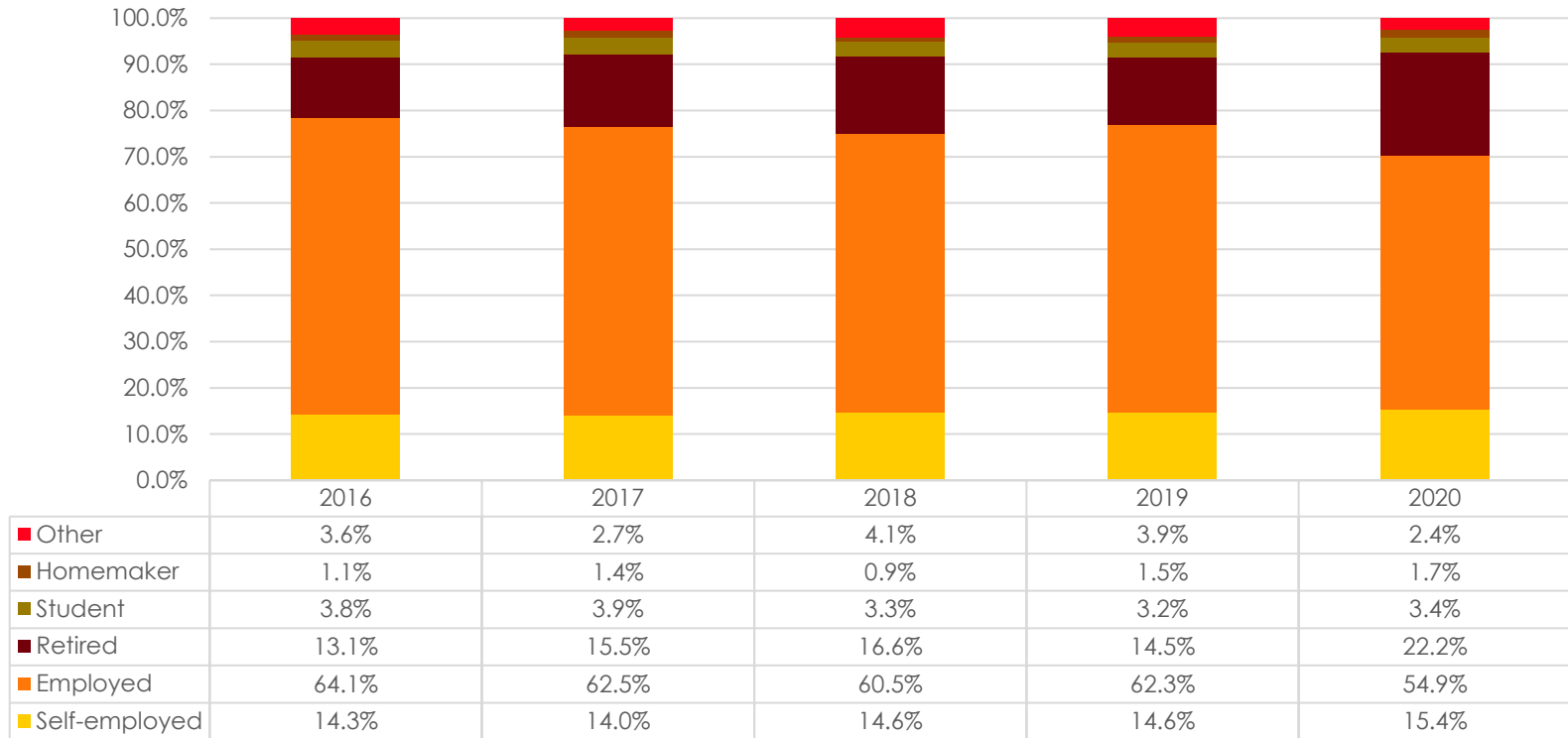


	2016	2017	2018	2019	2020
Post-Graduate	32.8%	31.7%	32.5%	31.1%	35.6%
College Grad	27.9%	26.5%	26.7%	27.8%	24.0%
Associate Degree	4.2%	5.4%	4.7%	4.4%	5.4%
Vocational/ Tech	9.1%	11.3%	8.1%	7.1%	8.4%
Some College	9.1%	9.5%	8.3%	9.0%	9.6%
H.S. Grad	13.9%	13.5%	17.1%	17.6%	14.1%
Some / No H.S.	3.1%	2.3%	2.7%	2.9%	2.9%

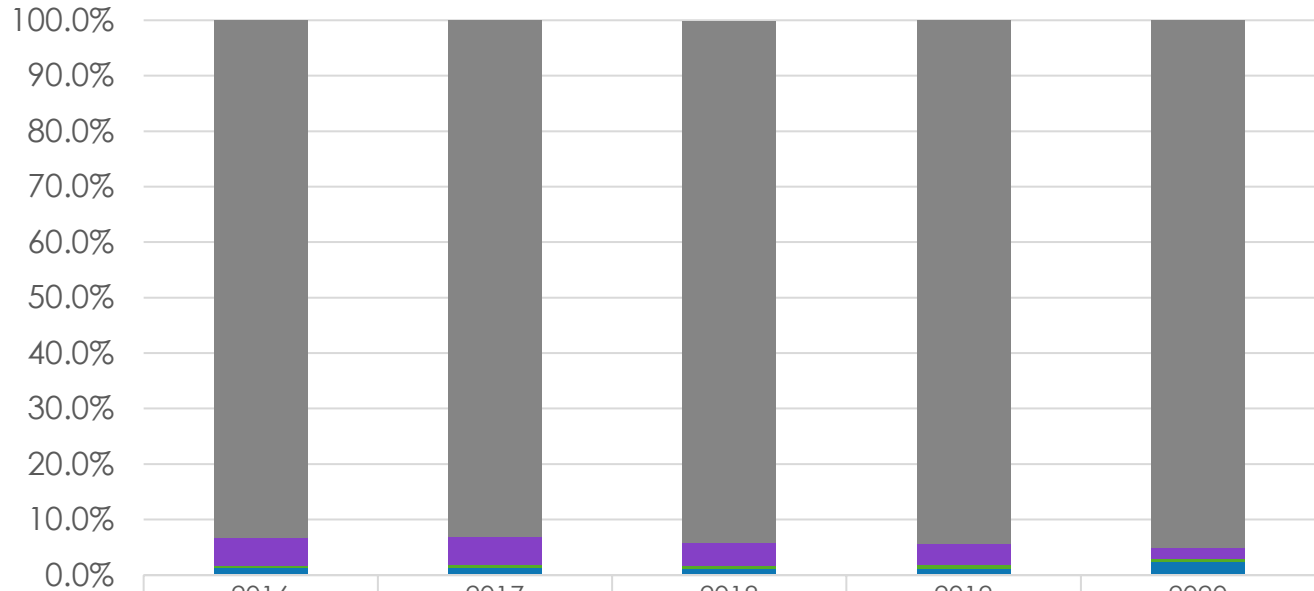
# VISITOR PROFILE – AGE – EUROPE



# VISITOR PROFILE – EMPLOYMENT STATUS – EUROPE



# VISITOR PROFILE – HAWAII PROPERTY OWNER – EUROPE



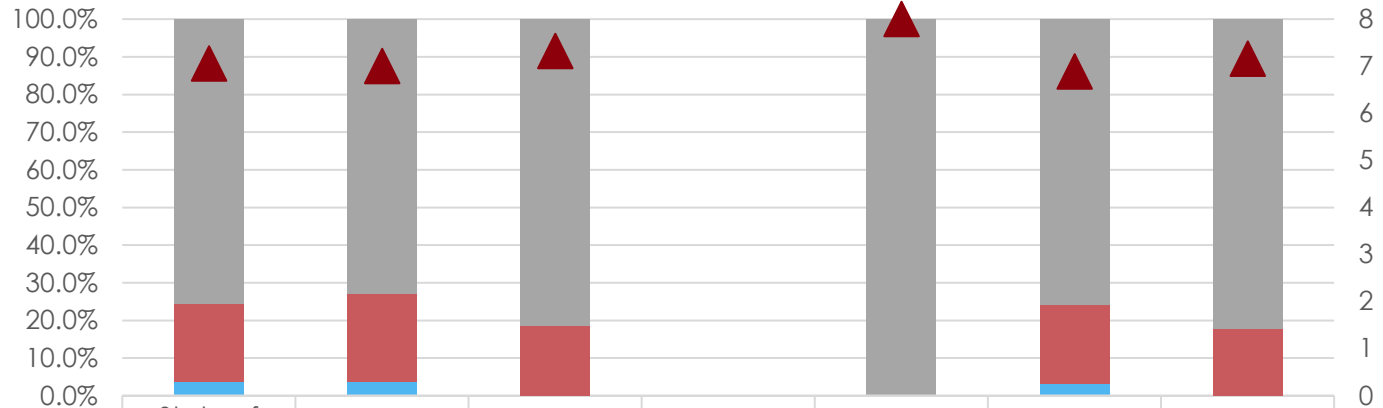
■ Do not nor plan to purchase	93.2%	93.2%	94.1%	94.3%	95.1%
■ Plan to in future	5.2%	5.0%	4.1%	3.8%	2.0%
■ Other Property Type	0.3%	0.6%	0.6%	0.7%	0.6%
■ Timeshare	1.3%	1.3%	1.1%	1.2%	2.4%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – OCEANIA

# OVERALL SATISFACTION – MOST RECENT VISIT – OCEANIA

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



■ Excellent (7-8)	75.6%	72.8%	81.6%		100.0%	75.7%	82.4%
■ Above Average (5-6)	20.5%	23.6%	18.4%		0.0%	21.2%	17.6%
■ Below Average (3-4)	3.9%	3.6%	0.0%		0.0%	3.1%	0.0%
■ Poor (1-2)	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%
BASE	323	310	35		1	36	29
▲ MEAN	7.06	7.00	7.32		8.00	6.89	7.16



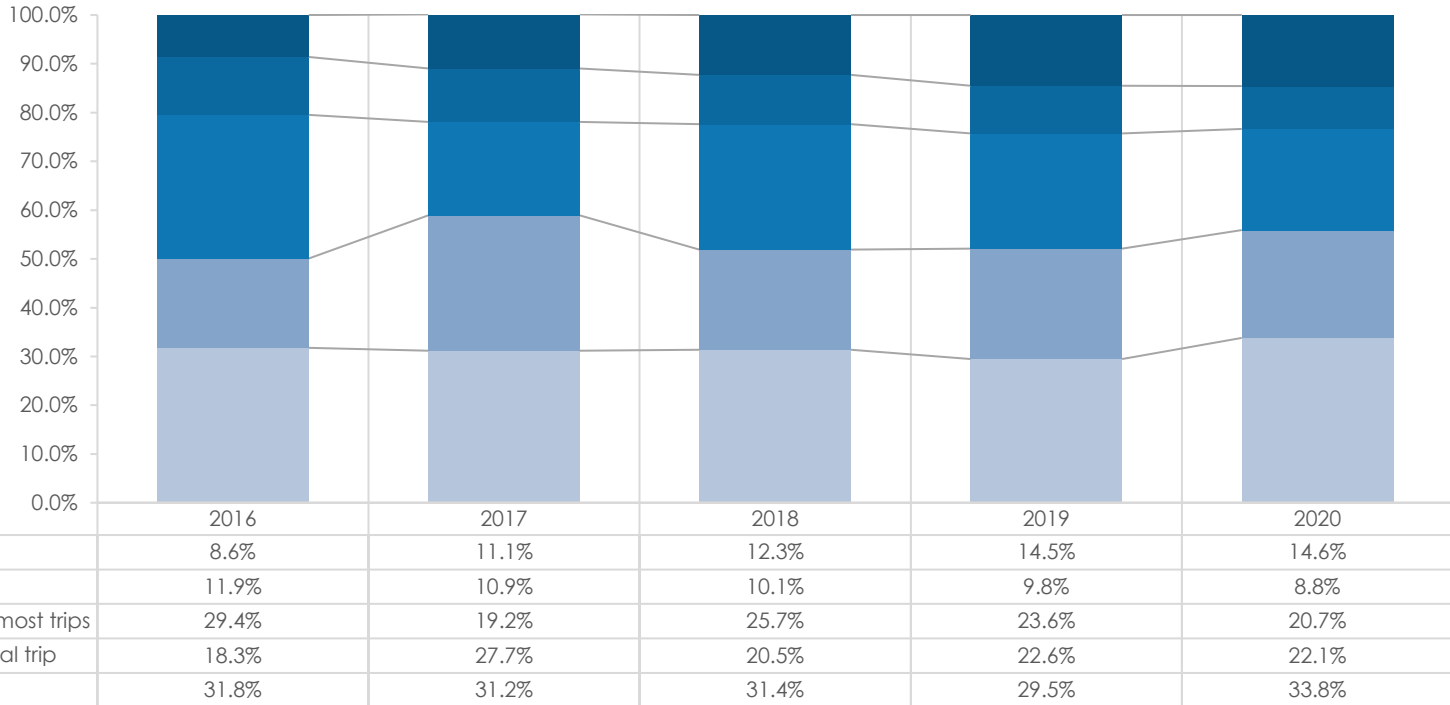
# PRIMARY TRIP PURPOSE OCEANIA

	2018	2019	2020
Vacation	73.8%	71.8%	82.6%
Anniversary/ birthday	5.7%	5.1%	5.0%
Layover/ break up long flight	9.9%	11.9%	3.9%
Visit friends or relatives	2.2%	2.0%	2.1%
Honeymoon	2.4%	1.9%	1.6%
Attend wedding/ vow renewal	0.4%	1.3%	0.6%

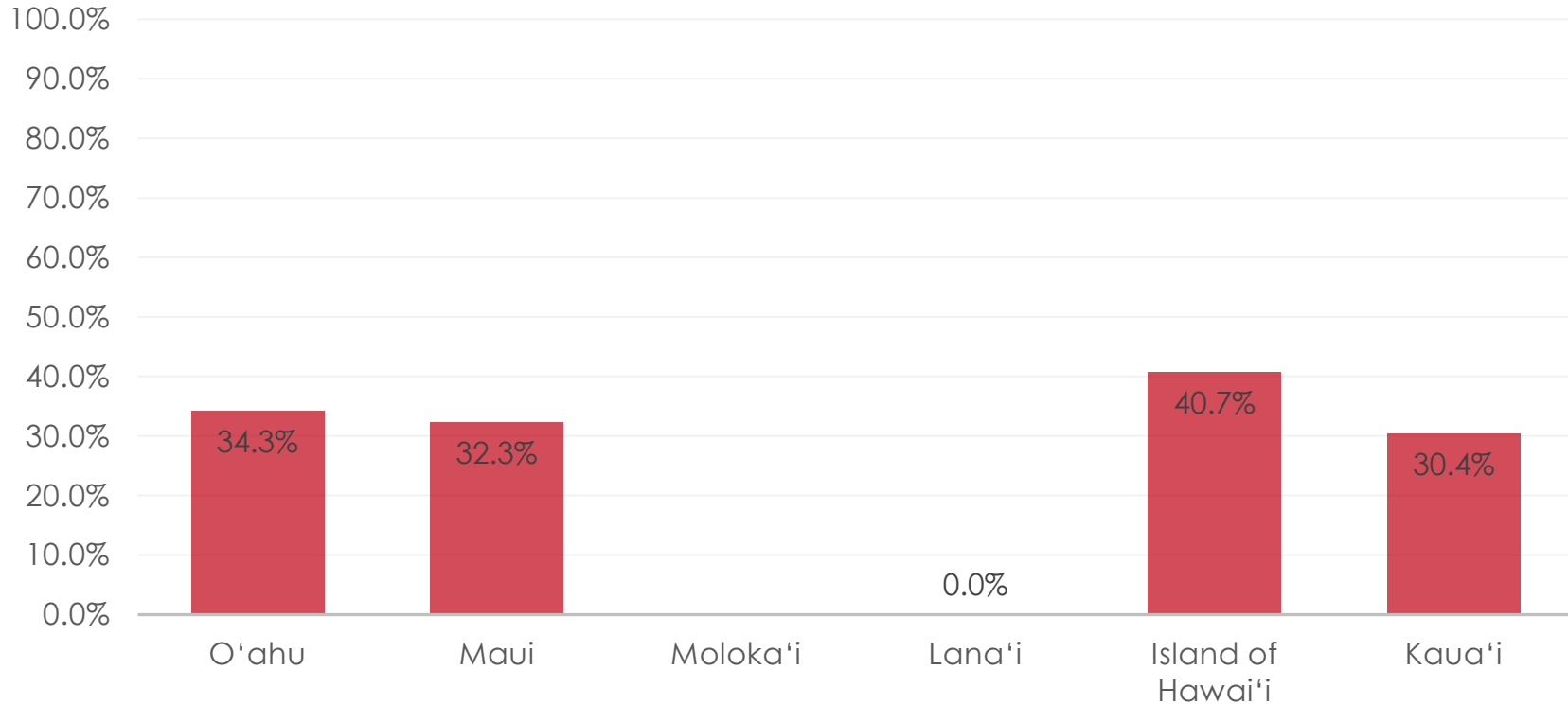
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE OCEANIA

	2018	2019	2020
Vacation	89.8%	88.9%	91.6%
Layover/ break up long trip	20.5%	22.6%	7.9%
Anniversary/ birthday	12.1%	9.3%	7.1%
Visit friends/ relatives	4.2%	4.1%	6.0%
Other business	0.7%	0.8%	2.0%
Honeymoon	2.9%	2.2%	2.0%
Shopping/ fashion	9.2%	7.8%	0.6%

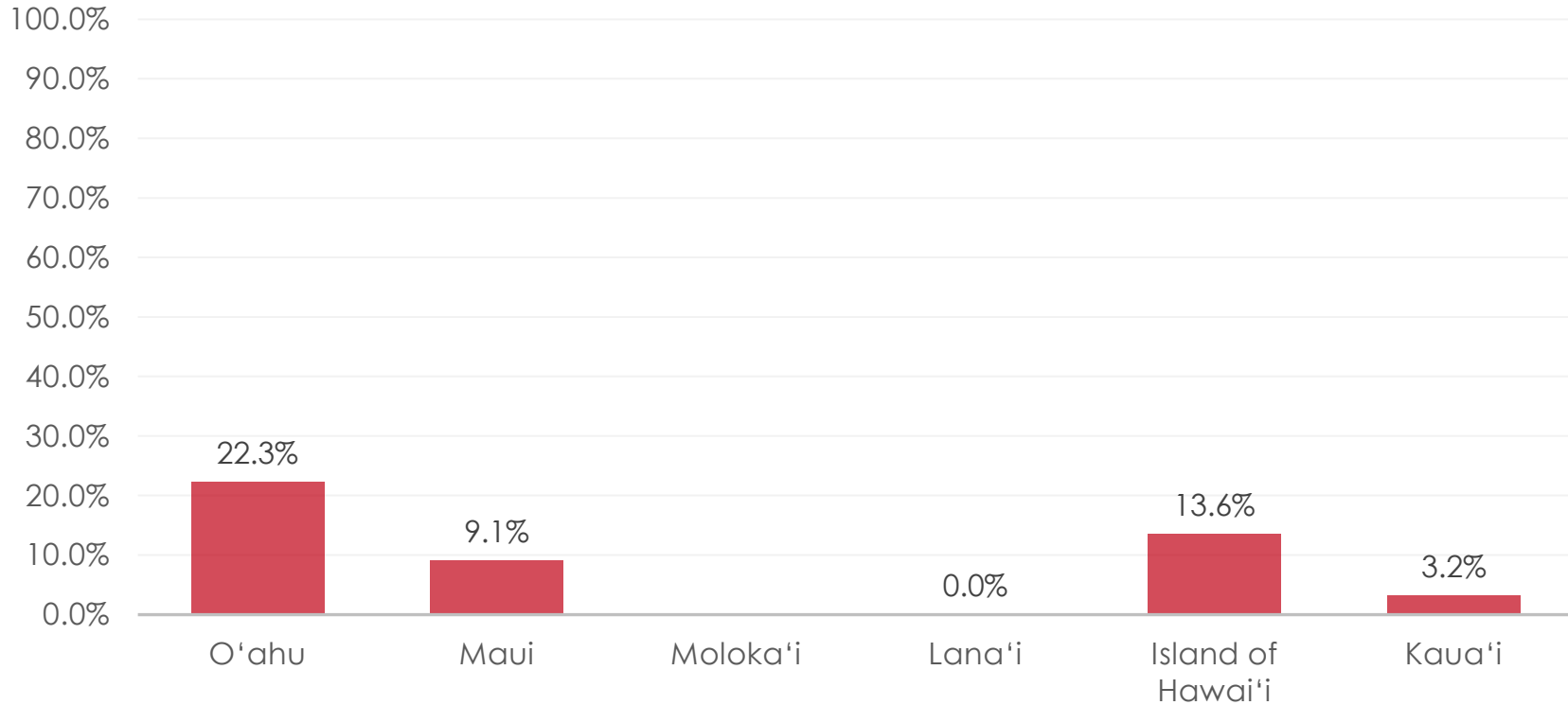
# VACATION TRIP DESCRIPTION – OCEANIA



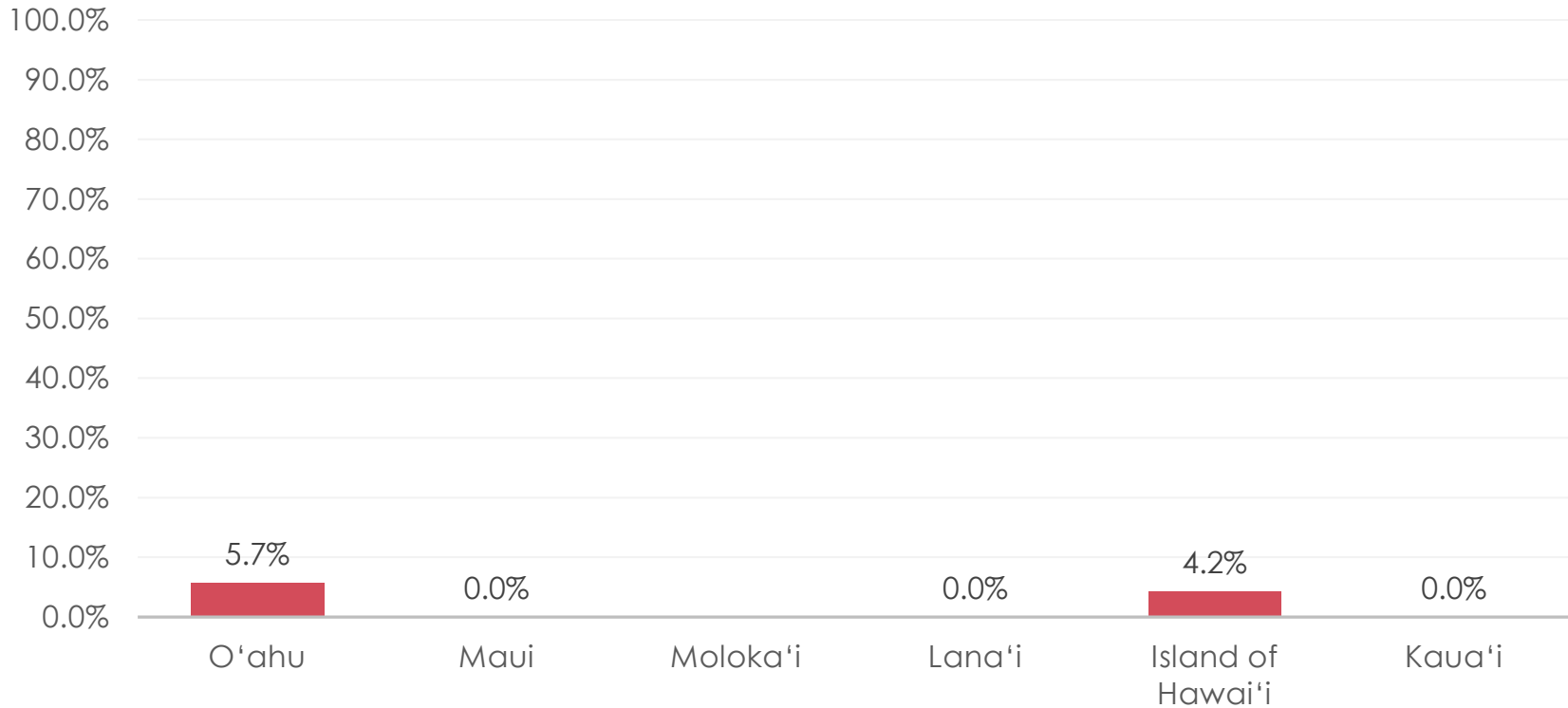
# ADVERTISING AWARENESS – OCEANIA



# IMPACT OF LOCATION FILMING – OCEANIA

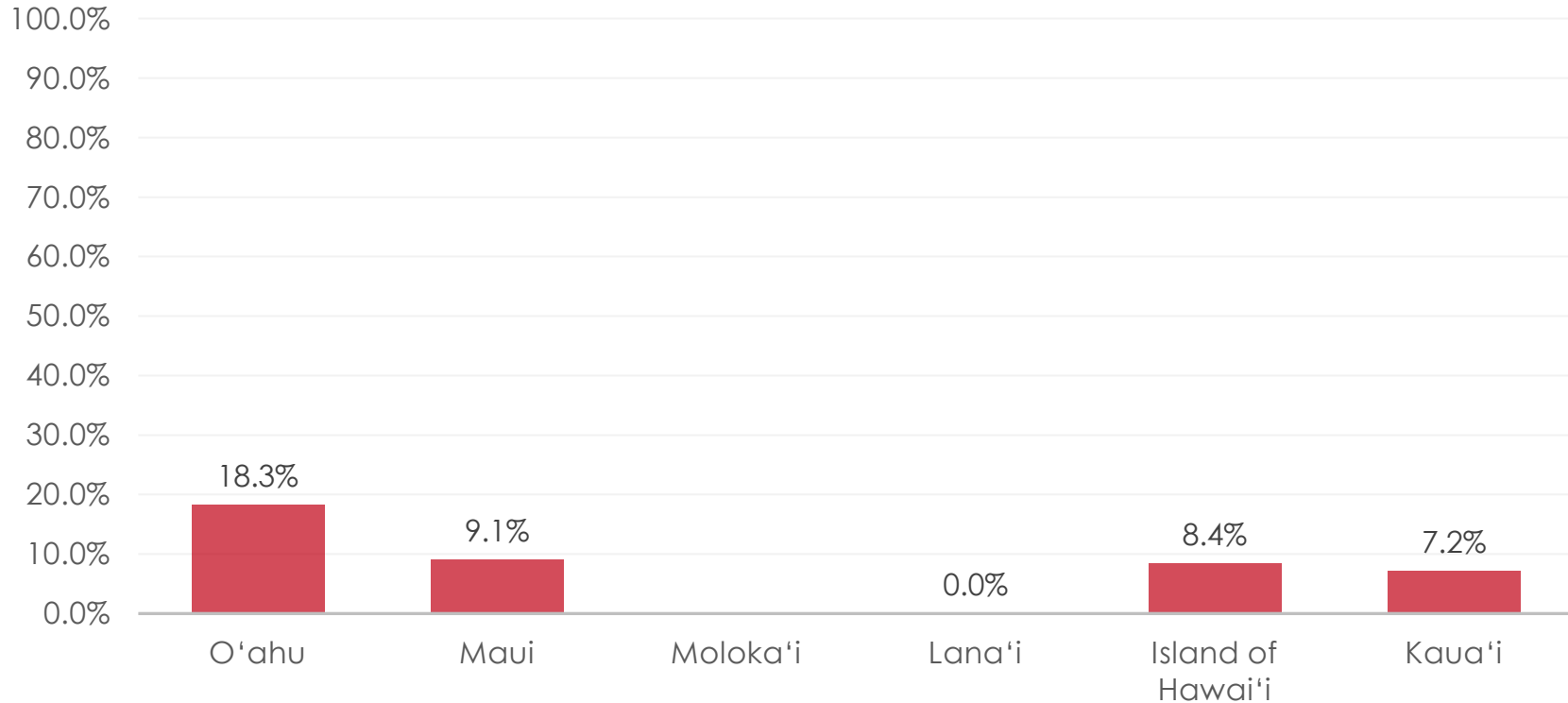


# IMPACT OF HAWAIIAN MUSIC – OCEANIA

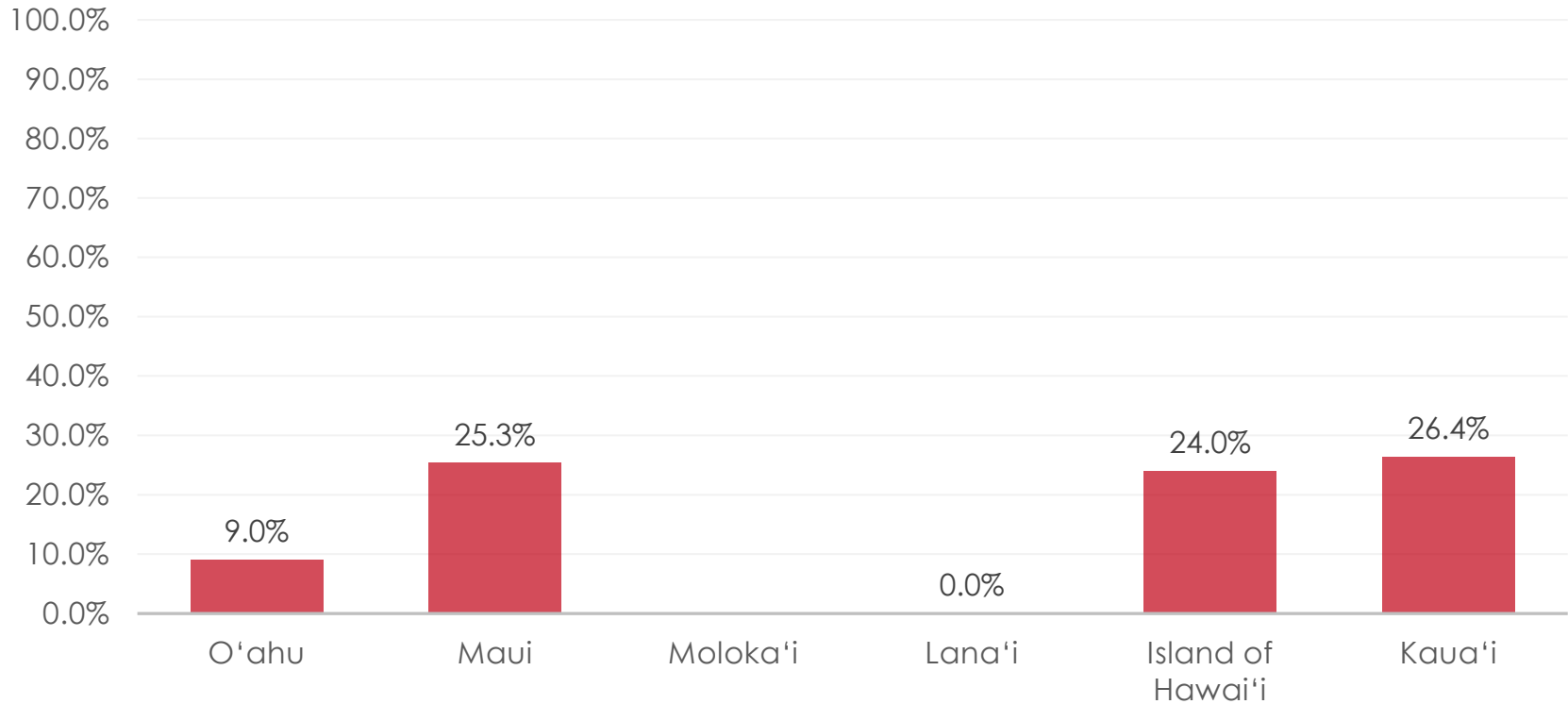


294 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – OCEANIA

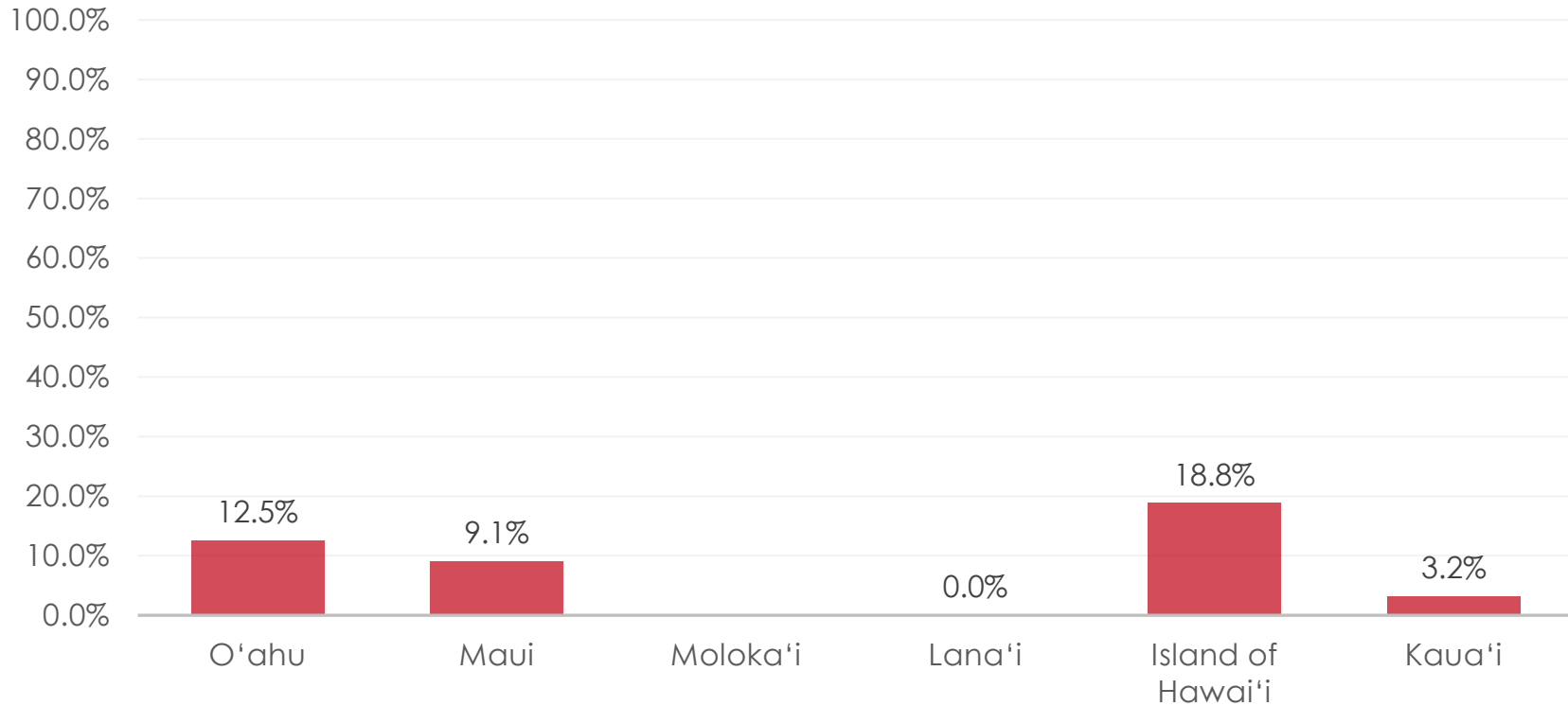


# IMPACT OF OUTDOOR/ SPORTING EVENTS – OCEANIA



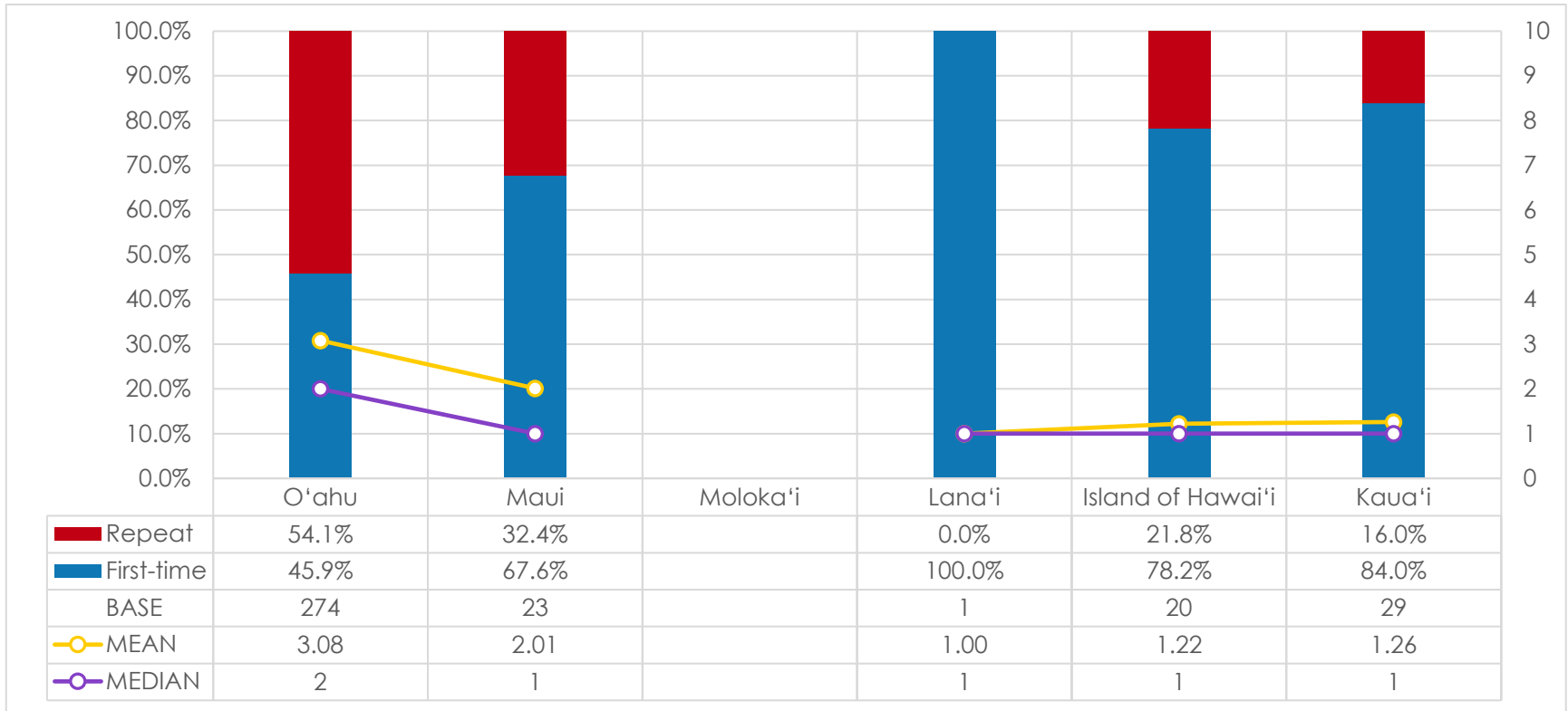


# IMPACT OF HAWAIIAN CULTURAL EVENTS – OCEANIA



297 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – OCEANIA



# TRAVEL PARTY MEMBERS – OCEANIA

	2016	2017	2018	2019	2020
<b>Spouse</b>	67.5%	67.7%	66.8%	62.8%	56.2%
<b>Other adult family</b>	21.5%	22.2%	22.3%	23.9%	30.0%
<b>Child under 18</b>	22.4%	25.2%	23.1%	21.3%	27.7%
<b>Friends/ associates</b>	16.0%	15.9%	15.7%	16.4%	11.8%
<b>Alone</b>	7.0%	7.2%	7.1%	7.7%	9.9%
<b>Girlfriend/ boyfriend</b>	4.7%	4.5%	4.1%	4.9%	5.6%
<b>Same sex partner</b>	1.1%	1.0%	1.1%	1.1%	0.9%

# LIKELIHOOD OF RETURN VISIT – OCEANIA

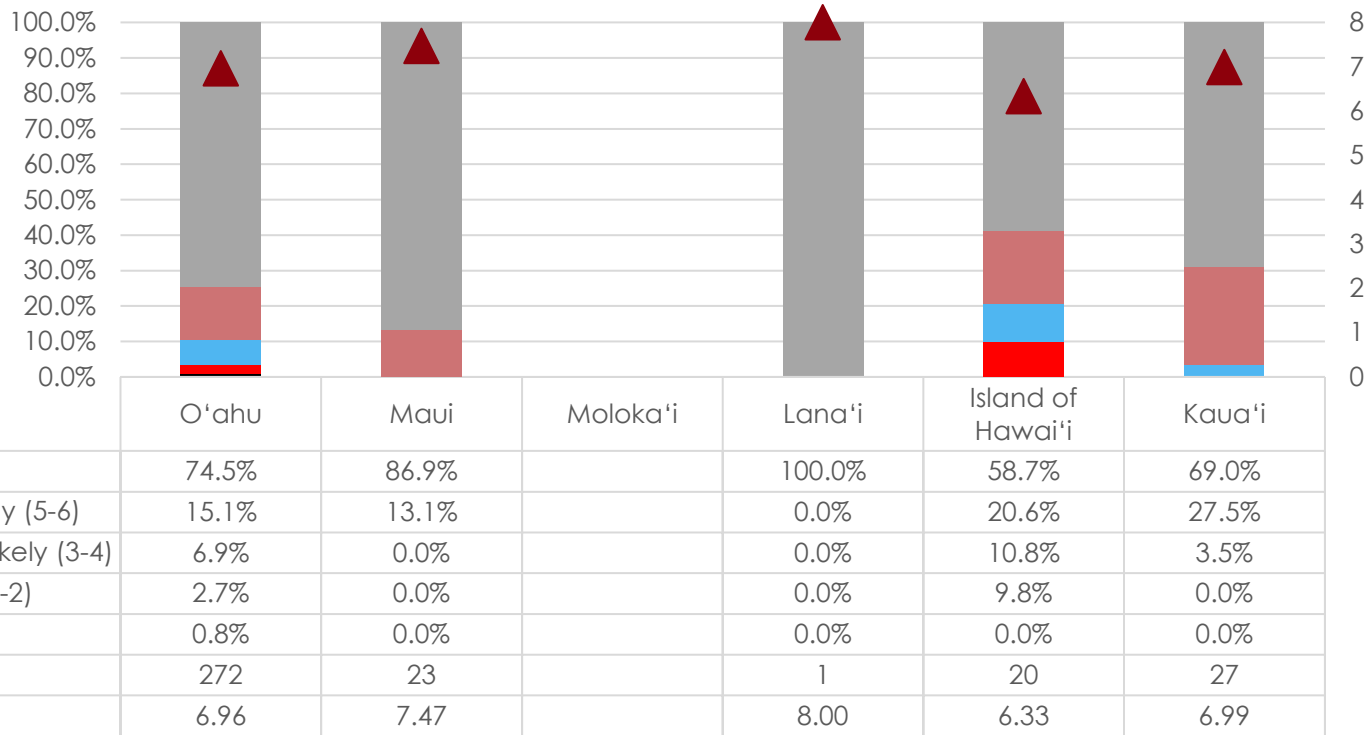
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
Very likely (7-8)	51.6%	38.4%		100.0%	19.6%	13.4%
Somewhat likely (5-6)	28.7%	40.4%		0.0%	25.0%	38.4%
Somewhat unlikely (3-4)	10.9%	8.1%		0.0%	15.2%	29.9%
Very unlikely (1-2)	7.3%	4.1%		0.0%	30.4%	15.0%
Not sure	1.6%	9.1%		0.0%	9.8%	3.3%
BASE	273	23		1	20	28
MEAN	6.21	6.01		7.00	4.24	4.61

# BRAND/DESTINATION ADVOCACY – OCEANIA

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



301 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

## ACTIVITIES – SIGHTSEEING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	89.5%	87.8%	0.0%	100.0%	95.6%	92.3%
<b>On own (self guided)</b>	52.0%	46.5%	0.0%	0.0%	73.9%	57.8%
<b>Helicopter/ airplane</b>	0.0%	0.0%	0.0%	0.0%	0.0%	18.1%
<b>Boat/ submarine/ whale</b>	15.3%	39.4%	0.0%	100.0%	9.8%	30.2%
<b>Visit towns</b>	25.5%	54.5%	0.0%	0.0%	55.4%	47.4%
<b>Limo/ van/ bus tour</b>	29.3%	28.2%	0.0%	0.0%	16.3%	14.7%
<b>Scenic views/ natural landmark</b>	45.2%	40.4%	0.0%	100.0%	65.2%	54.4%
<b>Movie/ TV/ film location</b>	10.7%	0.0%	0.0%	0.0%	0.0%	3.5%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	92.9%	92.3%	92.0%	91.0%
<b>On own (self guided)</b>	46.8%	48.7%	48.2%	54.9%
<b>Helicopter/ airplane</b>	7.2%	8.2%	7.1%	1.5%
<b>Boat/ submarine/ whale</b>	20.0%	18.7%	16.4%	19.3%
<b>Visit towns</b>	20.2%	31.4%	29.4%	31.0%
<b>Limo/ van/ bus tour</b>	35.9%	35.9%	32.4%	27.6%
<b>Scenic views/ natural landmark</b>	62.9%	51.7%	50.3%	47.3%
<b>Movie/ TV/ film location</b>	8.4%	9.6%	10.2%	9.5%

# ACTIVITIES – RECREATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.5%	91.9%	0.0%	100.0%	100.0%	88.0%
<b>Beach/ sunbathing</b>	76.4%	60.6%	0.0%	100.0%	55.4%	48.3%
<b>Bodyboard</b>	3.8%	0.0%	0.0%	0.0%	4.4%	3.5%
<b>Standup paddle board</b>	6.7%	0.0%	0.0%	0.0%	4.4%	0.0%
<b>Surfing</b>	7.9%	0.0%	0.0%	0.0%	9.8%	3.5%
<b>Canoeing/ kayak</b>	2.2%	0.0%	0.0%	0.0%	0.0%	3.5%
<b>Swim ocean</b>	61.8%	63.7%	0.0%	100.0%	45.6%	47.4%
<b>Snorkel</b>	22.3%	42.5%	0.0%	100.0%	40.2%	41.4%
<b>Freediving</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fishing</b>	2.3%	0.0%	0.0%	0.0%	5.4%	0.0%
<b>Golf</b>	1.5%	4.1%	0.0%	0.0%	4.4%	0.0%



# STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	92.2%	94.1%	93.4%	94.3%
<b>Beach/ sunbathing</b>	78.7%	78.4%	75.8%	74.3%
<b>Bodyboard</b>	12.1%	9.6%	8.1%	3.9%
<b>Standup paddle board</b>				6.1%
<b>Surfing</b>	9.3%	9.4%	7.5%	7.7%
<b>Canoeing/ kayak</b>	4.2%	4.0%	3.5%	2.2%
<b>Swim ocean</b>	NA	64.1%	64.2%	62.4%
<b>Snorkel</b>	NA	27.7%	27.2%	28.2%
<b>Freediving</b>				0.0%
<b>Windsurf/ Kitesurf</b>	0.3%	0.2%	0.0%	0.4%
<b>Jet ski/ Parasail</b>	1.4%	1.4%	1.3%	1.7%
<b>Scuba</b>	1.5%	1.1%	0.6%	0.0%
<b>Fishing</b>	1.1%	1.1%	0.7%	2.3%
<b>Golf</b>	3.2%	3.1%	2.8%	1.9%

305 Q During this trip, which of the following activities did you participate in?

\* Combined with bodyboard

# ACTIVITIES – RECREATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.5%	91.9%	0.0%	100.0%	100.0%	88.0%
<b>Run/ Jog/ Fitness walk</b>	26.1%	25.3%	0.0%	0.0%	26.1%	10.4%
<b>Spa</b>	6.2%	0.0%	0.0%	0.0%	4.4%	0.0%
<b>Hiking</b>	19.2%	18.2%	0.0%	100.0%	19.6%	33.6%
<b>Backpack/Camp</b>	0.0%	5.0%	0.0%	0.0%	0.0%	7.7%
<b>Agritourism</b>	8.8%	5.0%	0.0%	0.0%	10.8%	11.2%
<b>Sport event/ tournament</b>	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	24.0%	23.2%	0.0%	0.0%	43.5%	39.7%
<b>Waterpark</b>	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.0%	0.0%	0.0%	0.0%	0.0%	11.2%
<b>Zip lining</b>	1.4%	4.1%	0.0%	0.0%	4.4%	6.9%
<b>Skydiving</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Horseback riding</b>	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	92.2%	94.1%	93.4%	94.3%
<b>Run/ Jog/ Fitness walk</b>	28.2%	22.8%	20.1%	26.0%
<b>Spa</b>	7.4%	7.7%	6.1%	5.7%
<b>Hiking</b>	9.1%	10.8%	22.9%	21.7%
<b>Backpack/Camp</b>	*	*	0.6%	1.0%
<b>Agritourism</b>	5.1%	8.1%	8.6%	9.6%
<b>Sport event/ tournament</b>	1.9%	2.0%	2.5%	2.0%
<b>Park/ botanical garden</b>	29.7%	32.9%	30.4%	27.1%
<b>Waterpark</b>	NA	2.0%	1.4%	0.9%
<b>Mountain tube/ waterfall rappel</b>	NA	0.9%	1.2%	0.9%
<b>Zip lining</b>	NA	2.4%	3.1%	2.4%
<b>Skydiving</b>	NA	0.1%	0.1%	0.0%
<b>All terrain vehicle (ATV)</b>	NA	3.3%	4.1%	3.8%
<b>Horseback riding</b>	NA	1.6%	1.0%	0.7%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	98.2%	90.9%	0.0%	100.0%	100.0%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	15.9%	13.1%	0.0%	0.0%	10.8%	18.9%
<b>Live music/ stage show</b>	18.8%	31.3%	0.0%	0.0%	10.8%	14.7%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.0%	8.1%	0.0%	0.0%	15.2%	0.0%
<b>Fine dining</b>	36.0%	26.3%	0.0%	0.0%	34.8%	15.5%
<b>Family restaurant</b>	71.5%	54.6%	0.0%	100.0%	59.8%	44.8%
<b>Fast food</b>	54.4%	27.2%	0.0%	0.0%	35.8%	21.6%
<b>Food truck</b>	24.5%	19.1%	0.0%	0.0%	0.0%	30.2%
<b>Café/ coffee house</b>	62.8%	70.7%	0.0%	0.0%	75.0%	50.9%
<b>Ethnic dining</b>	14.4%	13.1%	0.0%	0.0%	9.8%	18.9%
<b>Prepared own meal</b>	20.2%	34.4%	0.0%	0.0%	40.2%	39.7%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	98.6%	98.2%	97.9%	98.4%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	24.2%	21.0%	18.6%	17.0%
<b>Live music/ stage show</b>	23.9%	25.3%	23.2%	20.1%
<b>Nightclub/ dancing/ bar/ karaoke</b>	9.0%	9.4%	8.0%	6.4%
<b>Fine dining</b>	39.0%	38.3%	34.7%	35.1%
<b>Family restaurant</b>	75.3%	67.7%	66.3%	69.6%
<b>Fast food</b>	48.6%	49.9%	48.9%	51.5%
<b>Food truck</b>	NA	23.9%	23.8%	24.0%
<b>Café/ coffee house</b>	58.0%	58.8%	58.8%	64.4%
<b>Ethnic dining</b>	16.5%	14.5%	15.5%	15.4%
<b>Prepared own meal</b>	23.5%	25.2%	25.5%	25.0%

## ACTIVITIES – SHOPPING – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.1%	86.9%	0.0%	0.0%	100.0%	84.5%
<b>Mall/ department store</b>	81.0%	42.5%	0.0%	0.0%	33.7%	37.1%
<b>Designer boutique</b>	23.0%	21.2%	0.0%	0.0%	0.0%	10.4%
<b>Hotel/ resort store</b>	30.6%	31.3%	0.0%	0.0%	29.4%	10.4%
<b>Swap meet/ flea market</b>	8.6%	0.0%	0.0%	0.0%	10.8%	11.2%
<b>Discount/ outlet store</b>	45.3%	25.3%	0.0%	0.0%	0.0%	3.5%
<b>Supermarket</b>	52.0%	60.6%	0.0%	0.0%	59.8%	44.0%
<b>Farmer's market</b>	14.0%	12.2%	0.0%	0.0%	41.3%	12.0%
<b>Convenience store</b>	69.0%	46.5%	0.0%	0.0%	60.8%	21.6%
<b>Duty free store</b>	7.7%	0.0%	0.0%	0.0%	4.4%	0.0%
<b>Local shop/ artisan</b>	44.2%	56.6%	0.0%	0.0%	56.5%	57.8%

# STATEWIDE - ACTIVITIES – SHOPPING – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	98.0%	96.9%	96.7%	96.2%
<b>Mall/ department store</b>	81.9%	78.0%	75.1%	75.6%
<b>Designer boutique</b>	26.1%	23.8%	19.6%	22.0%
<b>Hotel/ resort store</b>	35.1%	35.2%	33.9%	30.3%
<b>Swap meet/ flea market</b>	13.7%	9.2%	9.8%	8.8%
<b>Discount/ outlet store</b>	53.3%	49.4%	44.6%	41.3%
<b>Supermarket</b>	45.0%	54.0%	50.6%	54.1%
<b>Farmer's market</b>	15.1%	17.0%	18.1%	16.7%
<b>Convenience store</b>	62.0%	65.1%	64.1%	66.6%
<b>Duty free store</b>	11.9%	12.5%	10.8%	7.0%
<b>Local shop/ artisan</b>	53.2%	51.3%	50.8%	46.6%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	70.7%	53.5%	0.0%	0.0%	56.5%	50.9%
<b>Historic military site</b>	45.7%	5.0%	0.0%	0.0%	10.8%	7.7%
<b>Other historical site</b>	17.8%	13.1%	0.0%	0.0%	51.1%	17.3%
<b>Museum/ art gallery</b>	13.8%	17.2%	0.0%	0.0%	25.0%	6.9%
<b>Luau/ Polynesian show/ hula show</b>	25.4%	27.2%	0.0%	0.0%	20.6%	11.2%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	8.1%	9.1%	0.0%	0.0%	5.4%	6.9%
<b>Play/ concert/ theatre</b>	3.1%	0.0%	0.0%	0.0%	0.0%	4.3%
<b>Art/ craft fair</b>	4.4%	9.1%	0.0%	0.0%	0.0%	14.7%
<b>Festival event</b>	2.3%	0.0%	0.0%	0.0%	0.0%	4.3%



## STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	74.0%	74.6%	71.6%	69.1%
<b>Historic military site</b>	52.8%	45.5%	41.8%	40.5%
<b>Other historical site</b>	23.7%	21.7%	21.7%	20.3%
<b>Museum/ art gallery</b>	14.3%	14.5%	15.0%	14.8%
<b>Luau/ Polynesian show/ hula show</b>	34.3%	31.5%	28.1%	26.2%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.0%	6.6%	6.1%	8.3%
<b>Play/ concert/ theatre</b>	3.2%	4.4%	3.4%	3.0%
<b>Art/ craft fair</b>	5.4%	5.6%	6.9%	5.4%
<b>Festival event</b>	6.8%	4.1%	4.8%	2.3%

## ACTIVITIES – TRANSPORTATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.4%	100.0%	0.0%	100.0%	94.6%	92.3%
<b>Airport shuttle</b>	43.9%	28.2%	0.0%	0.0%	10.8%	14.7%
<b>Trolley</b>	24.9%	0.0%	0.0%	0.0%	0.0%	3.5%
<b>Public bus</b>	25.7%	8.1%	0.0%	0.0%	4.4%	3.5%
<b>Tour bus/ tour van</b>	35.9%	36.3%	0.0%	100.0%	31.5%	25.9%
<b>Taxi/ limo</b>	37.7%	18.2%	0.0%	0.0%	9.8%	10.4%
<b>Rental car</b>	33.3%	50.6%	0.0%	0.0%	63.1%	58.6%
<b>Ride share</b>	27.5%	26.3%	0.0%	0.0%	26.1%	8.6%
<b>Bicycle rental</b>	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – OCEANIA

	2017	2018	2019	2020
<b>TOTAL</b>	98.7%	96.9%	96.6%	96.7%
<b>Airport shuttle</b>	60.8%	53.1%	48.5%	40.2%
<b>Trolley</b>	23.7%	22.6%	22.8%	21.9%
<b>Public bus</b>	27.7%	30.1%	29.4%	23.4%
<b>Tour bus/ tour van</b>	35.8%	37.0%	35.3%	35.2%
<b>Taxi/ limo</b>	43.2%	39.0%	35.9%	34.8%
<b>Rental car</b>	31.8%	31.0%	32.5%	38.8%
<b>Ride share</b>	NA	20.6%	24.7%	27.1%
<b>Bicycle rental</b>	NA	1.7%	1.7%	1.6%

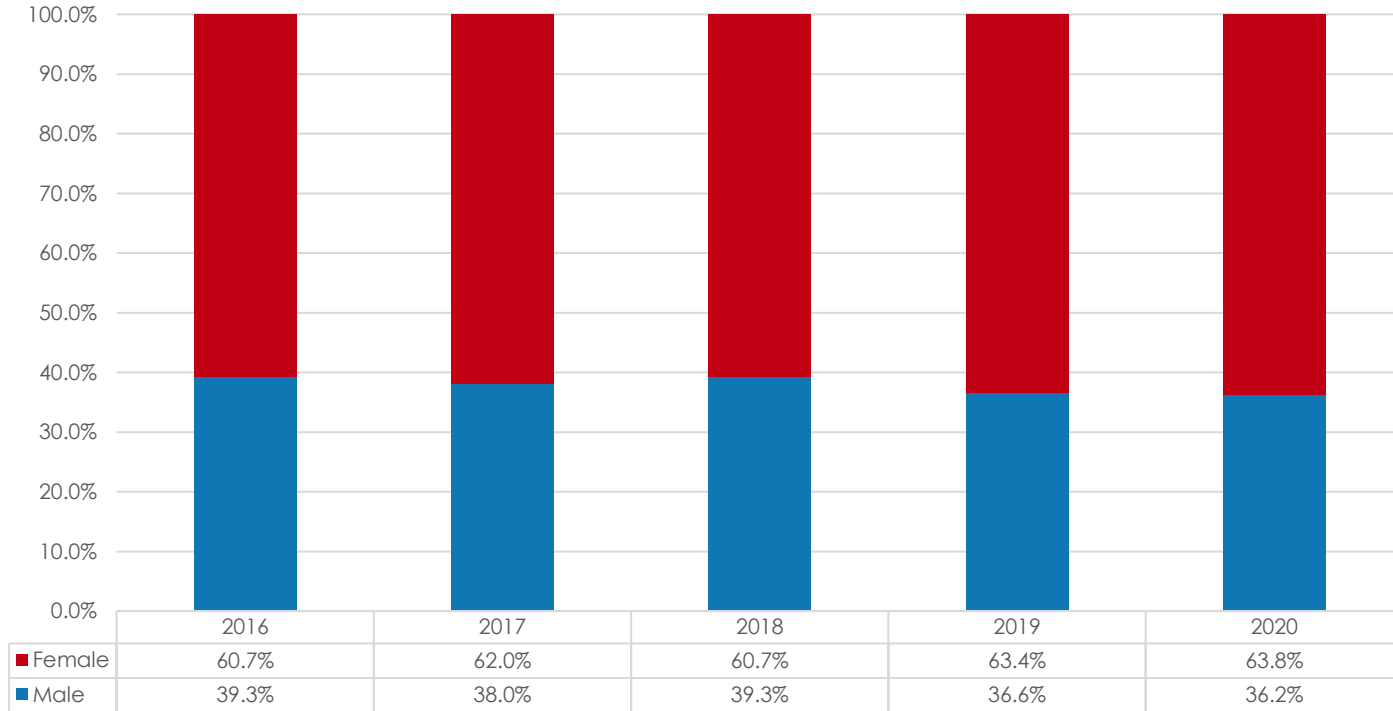
## ACTIVITIES – OTHER – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	5.1%	4.1%	0.0%	0.0%	10.8%	10.4%
<b>Visit friends/ family</b>	5.1%	4.1%	0.0%	0.0%	10.8%	10.4%
<b>Volunteer non profit</b>	0.3%	0.0%	0.0%	0.0%	5.4%	0.0%

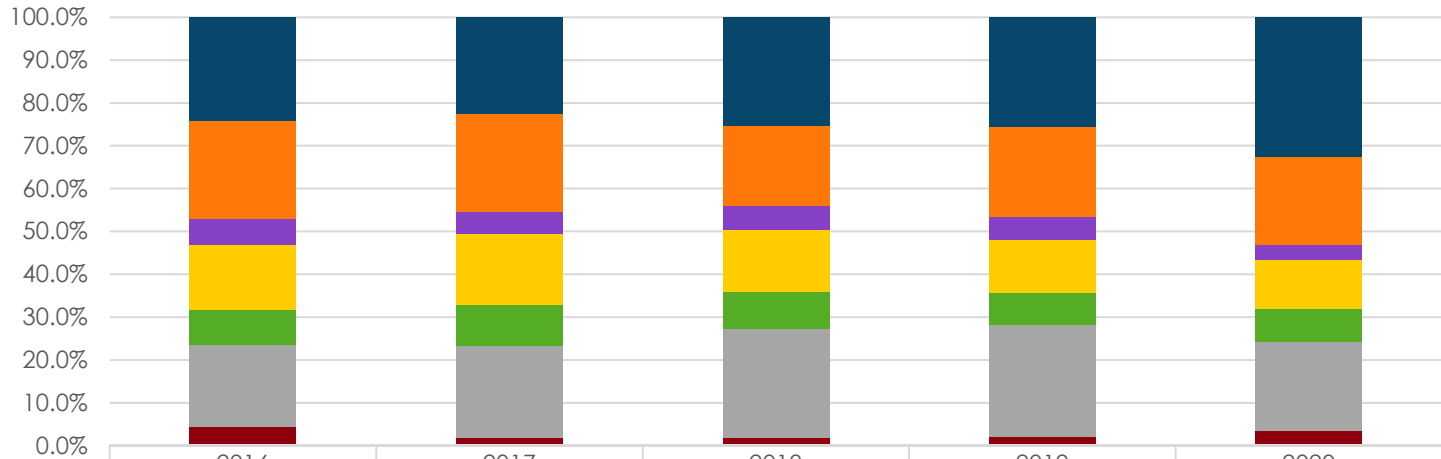
## ACTIVITIES – OTHER – OCEANIA

	2018	2019	2020
<b>TOTAL</b>	9.1%	9.2%	6.3%
<b>Visit friends/ family</b>	8.4%	8.8%	6.3%
<b>Volunteer non profit</b>	0.9%	0.7%	0.7%

# VISITOR PROFILE – GENDER – OCEANIA

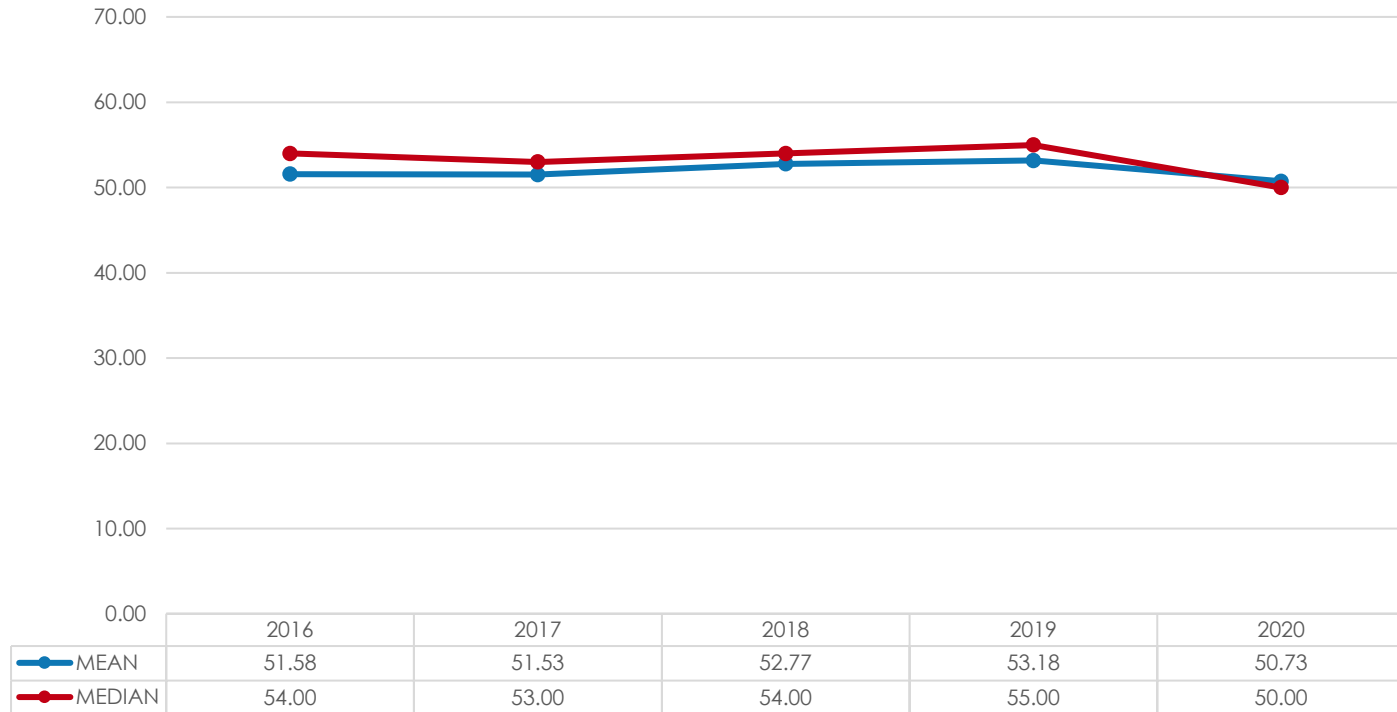


# VISITOR PROFILE – EDUCATION – OCEANIA



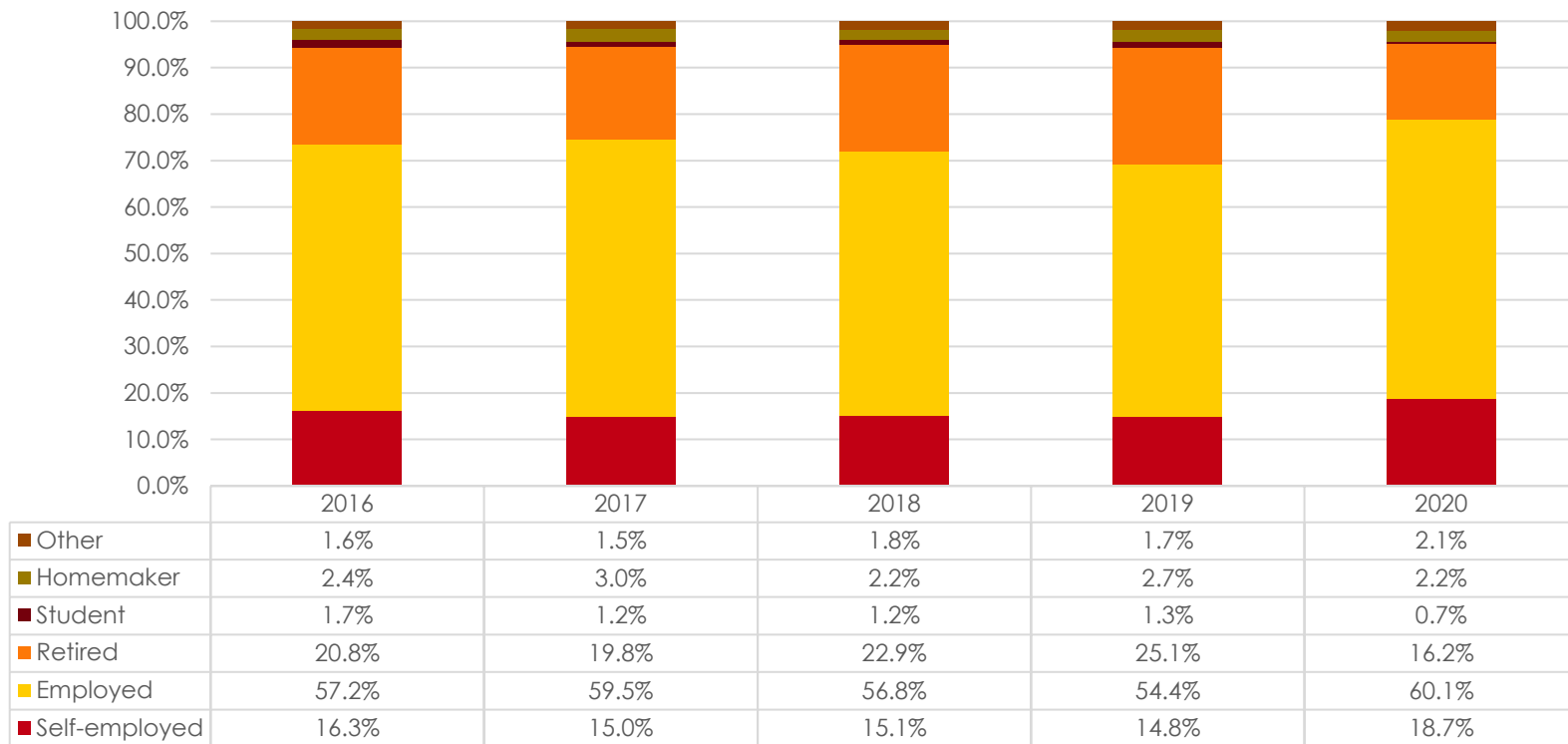
	2016	2017	2018	2019	2020
Post-Graduate	24.1%	22.6%	25.4%	25.5%	32.7%
College Grad	22.9%	23.0%	18.5%	21.1%	20.6%
Associate Degree	6.2%	5.1%	5.8%	5.6%	3.4%
Vocational/ Tech	15.0%	16.6%	14.4%	12.3%	11.4%
Some College	8.4%	9.4%	8.7%	7.5%	7.8%
H.S. Grad	19.1%	21.5%	25.3%	26.1%	20.8%
Some / No H.S.	4.3%	1.9%	1.9%	2.0%	3.4%

# VISITOR PROFILE – AGE – OCEANIA

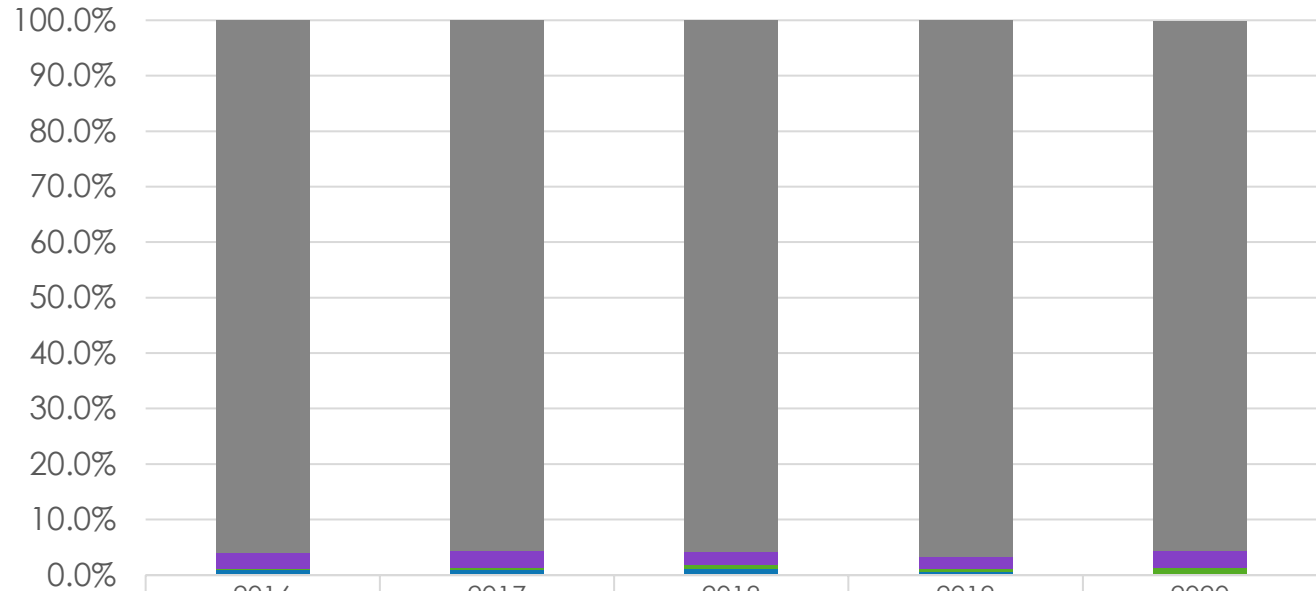




# VISITOR PROFILE – EMPLOYMENT STATUS – OCEANIA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – OCEANIA



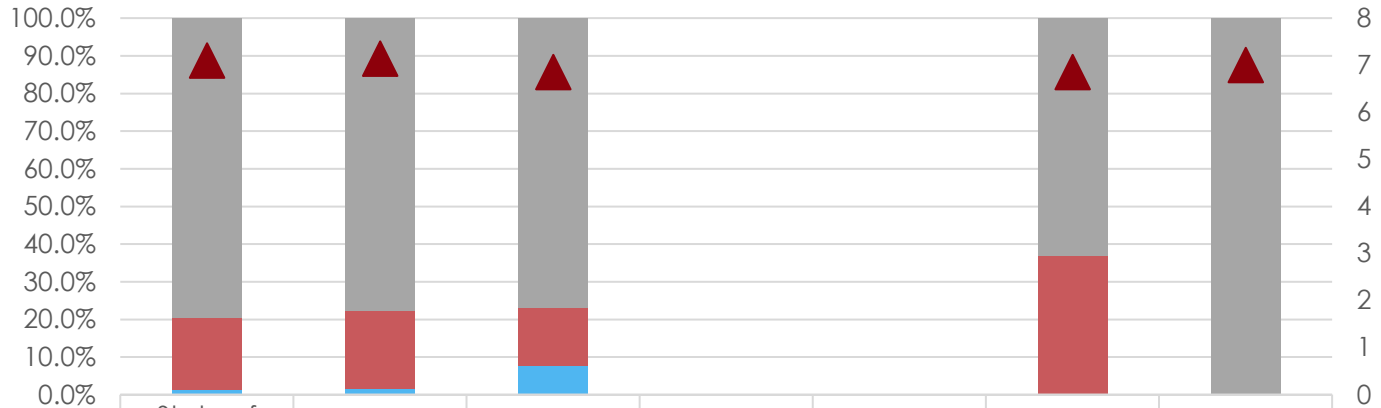
	2016	2017	2018	2019	2020
■ Do not nor plan to purchase	96.0%	95.7%	95.8%	96.7%	95.4%
■ Plan to in future	2.9%	3.0%	2.5%	2.2%	3.2%
■ Other Property Type	0.1%	0.3%	0.7%	0.5%	1.0%
■ Timeshare	1.0%	1.0%	1.1%	0.6%	0.3%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – CHINA

# OVERALL SATISFACTION – MOST RECENT VISIT – CHINA

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	79.5%	77.7%	77.0%			63.0%	100.0%
■ Above Average (5-6)	19.2%	20.9%	15.3%			37.0%	0.0%
■ Below Average (3-4)	1.4%	1.5%	7.7%			0.0%	0.0%
■ Poor (1-2)	0.0%	0.0%	0.0%			0.0%	0.0%
BASE	73	67	13			27	1
▲ MEAN	7.10	7.14	6.85			6.85	7.00

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

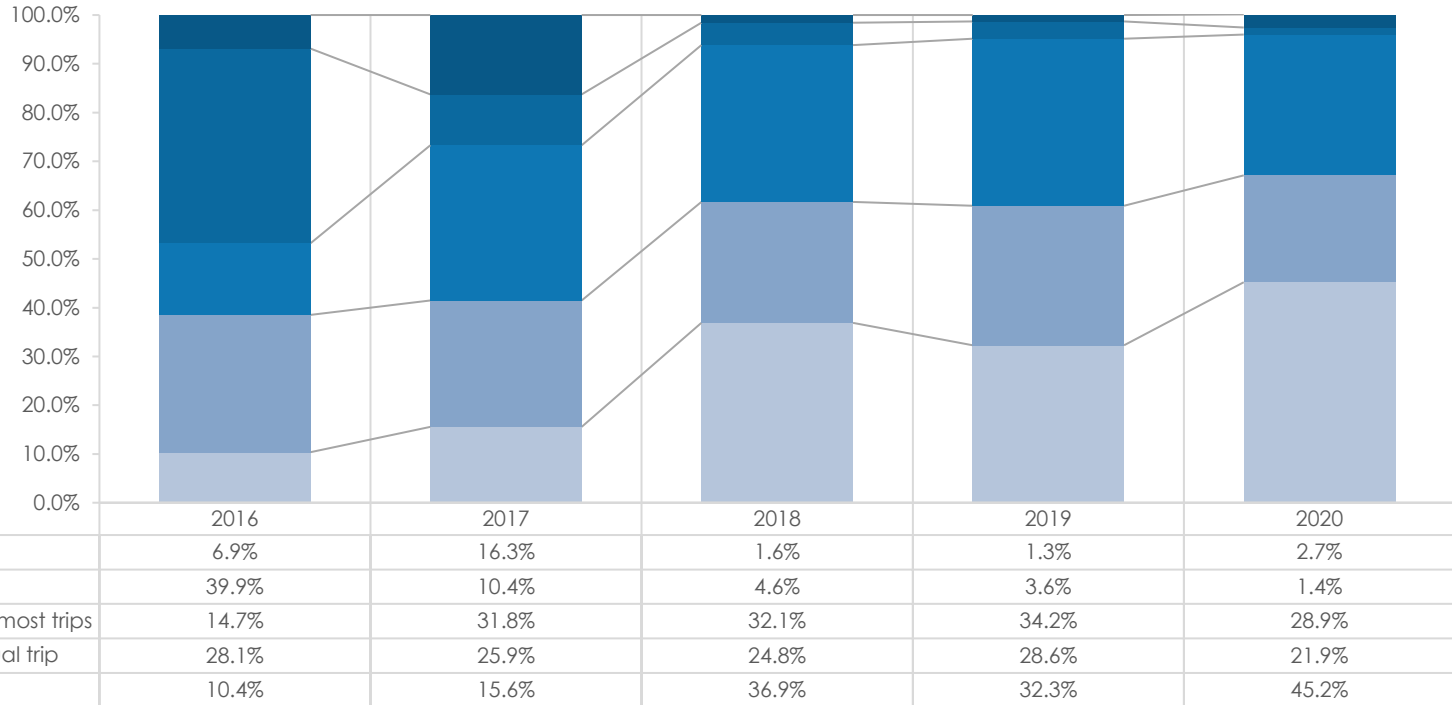
# PRIMARY TRIP PURPOSE CHINA

	2018	2019	2020
Vacation	71.2%	72.6%	79.5%
Honeymoon	3.7%	2.3%	6.8%
Visit friends/ relatives	3.2%	2.4%	4.1%
Incentive trip	2.3%	1.1%	2.8%
Convention, conference, seminar	2.9%	4.2%	2.7%
Other business	3.8%	5.3%	1.4%
Layover	1.1%	1.3%	1.4%

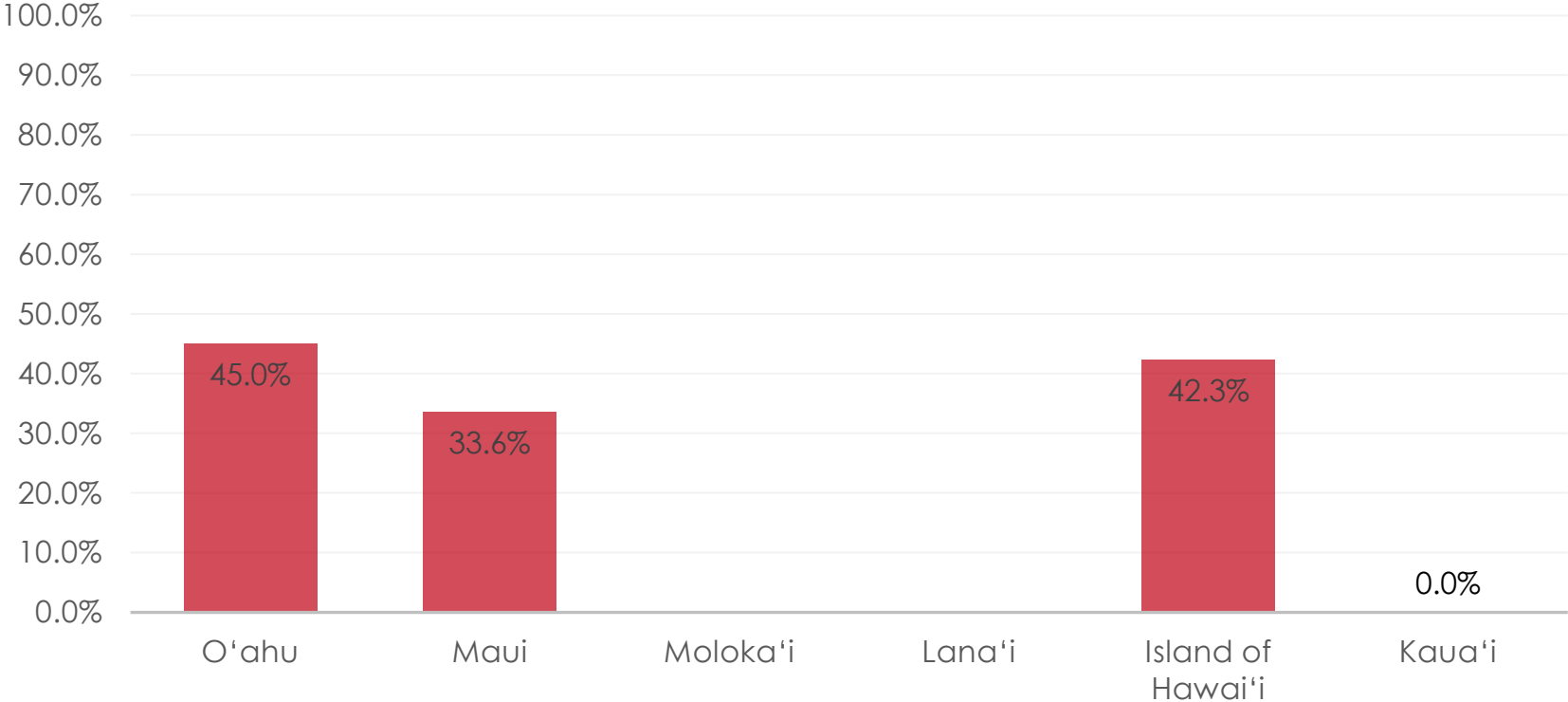
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE CHINA

	2018	2019	2020
Vacation	89.0%	88.1%	85.0%
Incentive trip	3.5%	2.3%	11.0%
Other business	5.1%	6.3%	9.6%
Visit friends/ relatives	6.4%	4.4%	8.2%
Honeymoon	5.1%	3.0%	8.2%
Convention, conference, seminar	4.0%	5.0%	2.7%
Corporate meeting	-	-	2.7%

# VACATION TRIP DESCRIPTION – CHINA

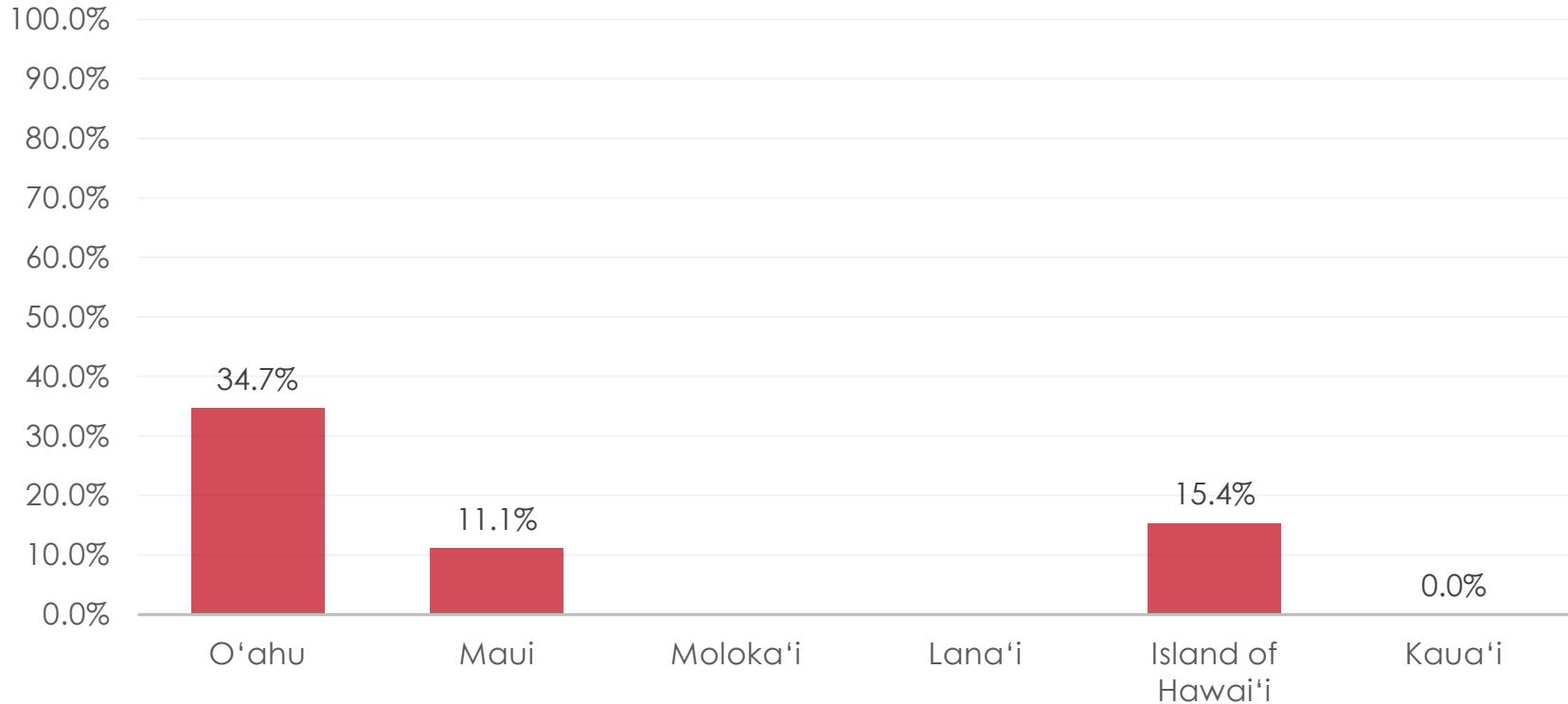


# ADVERTISING AWARENESS – CHINA



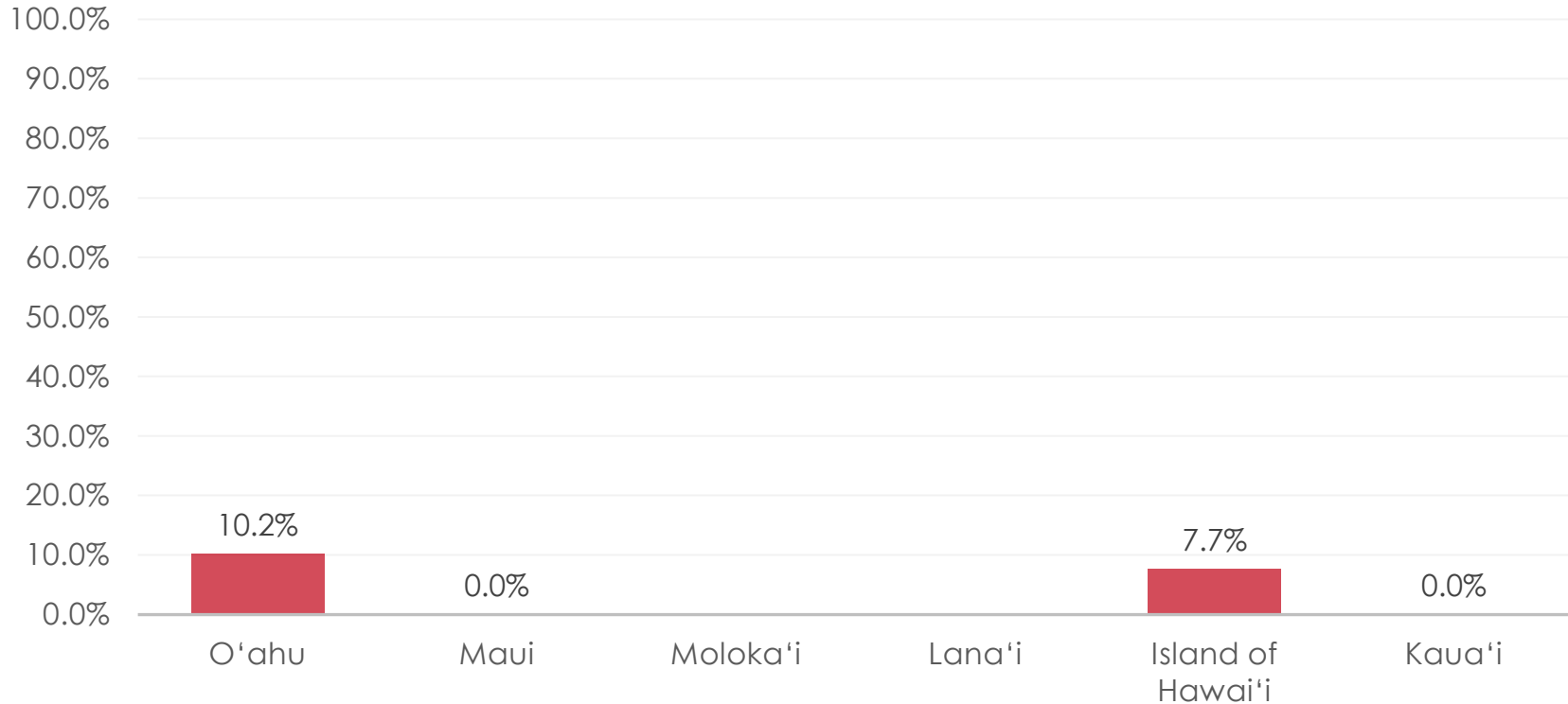


# IMPACT OF LOCATION FILMING – CHINA



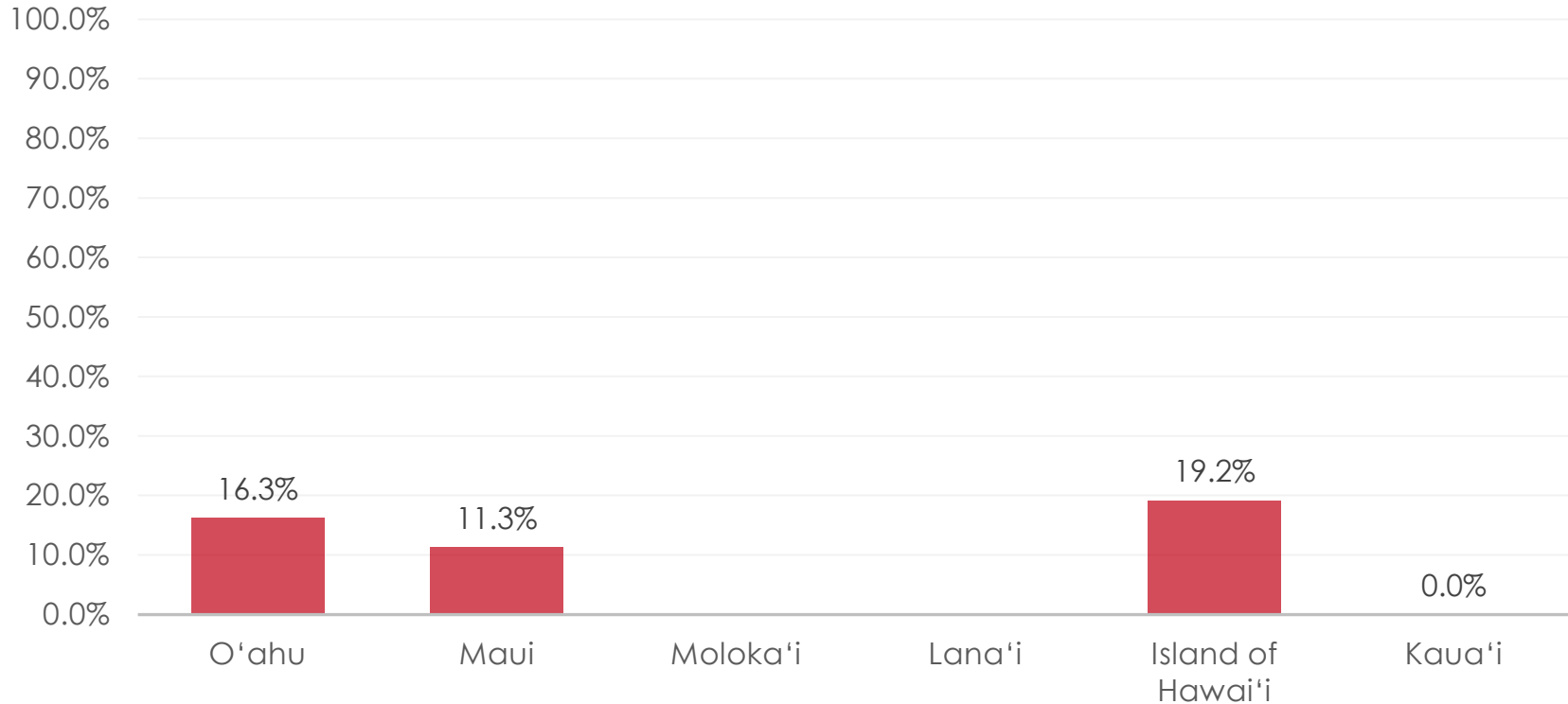
329 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF HAWAIIAN MUSIC – CHINA



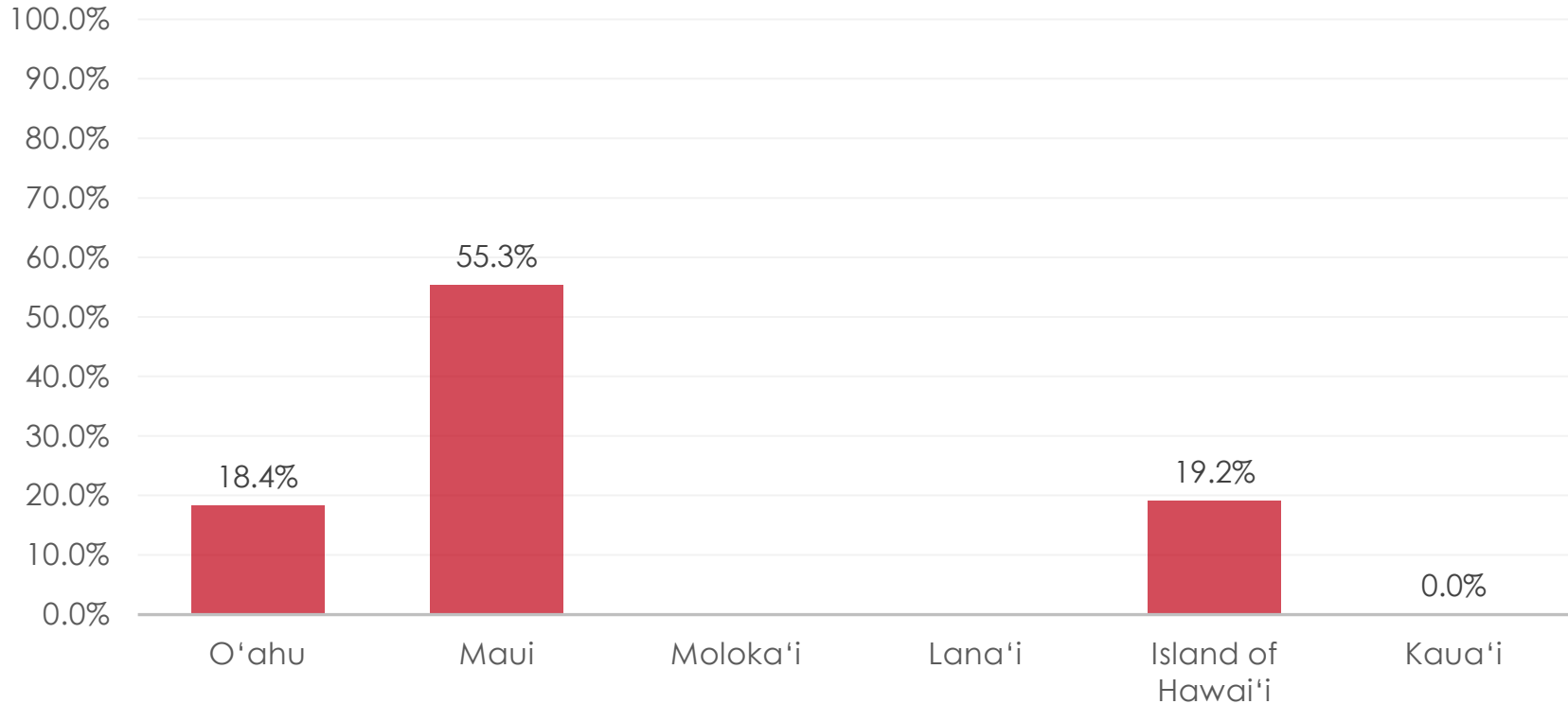
330 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – CHINA



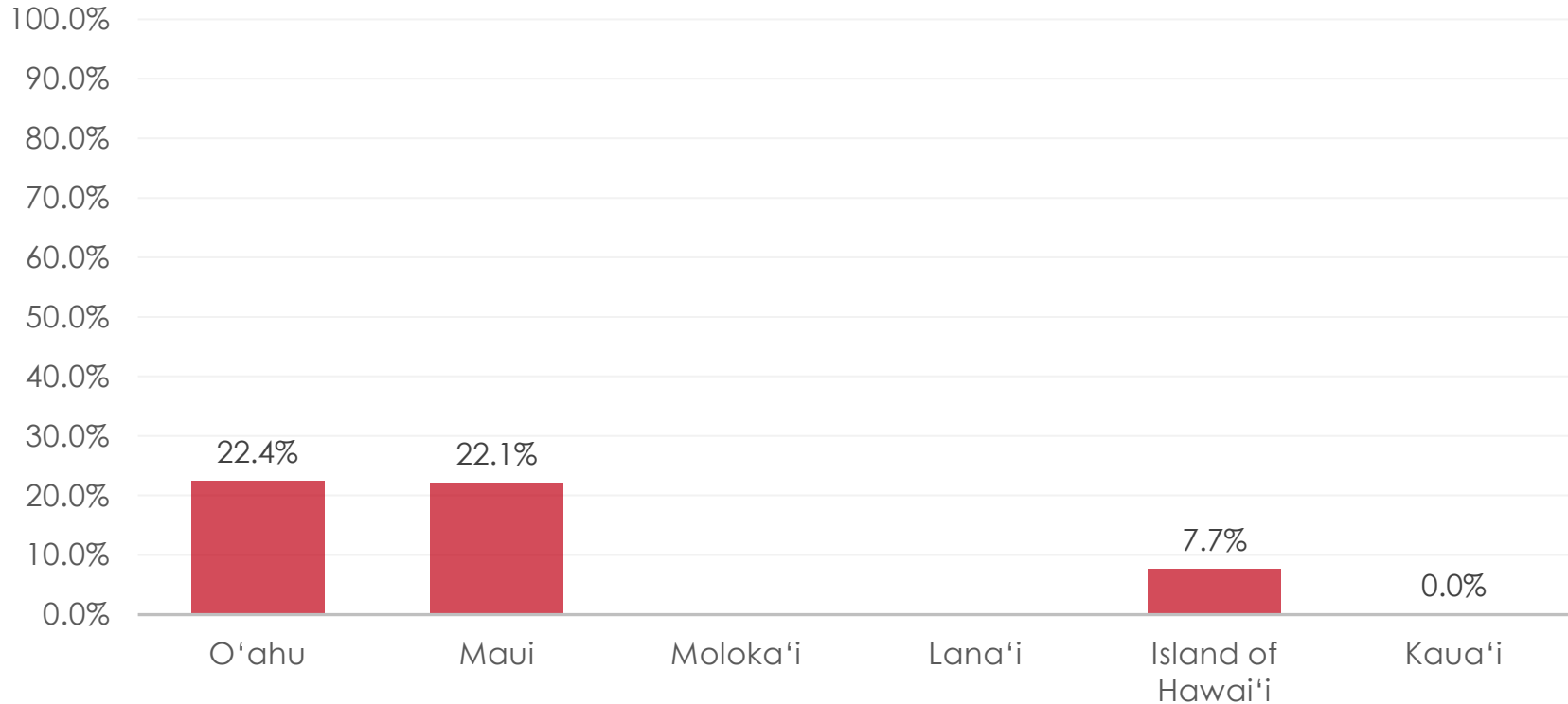
331 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF OUTDOOR/ SPORTING EVENTS – CHINA



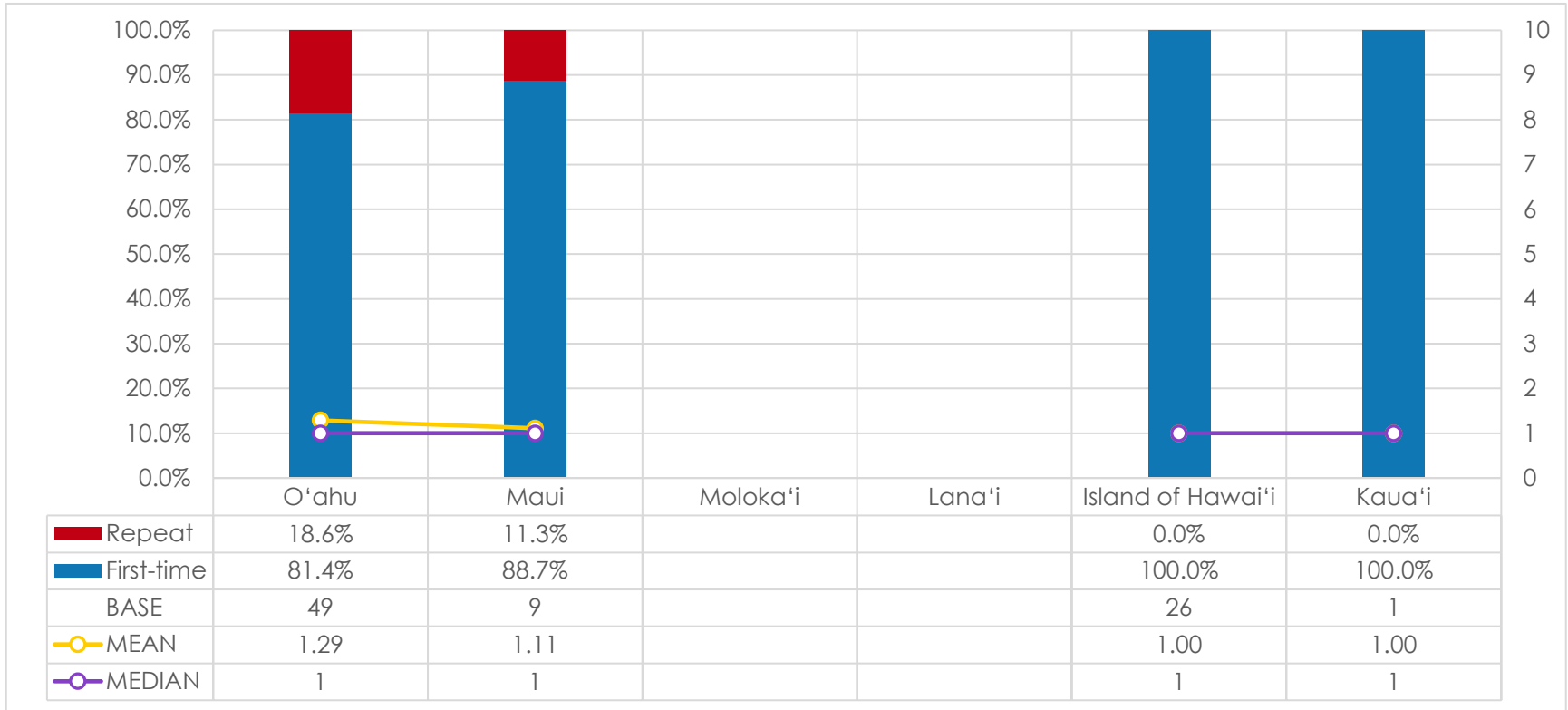
332 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF HAWAIIAN CULTURAL EVENTS – CHINA



333 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – CHINA

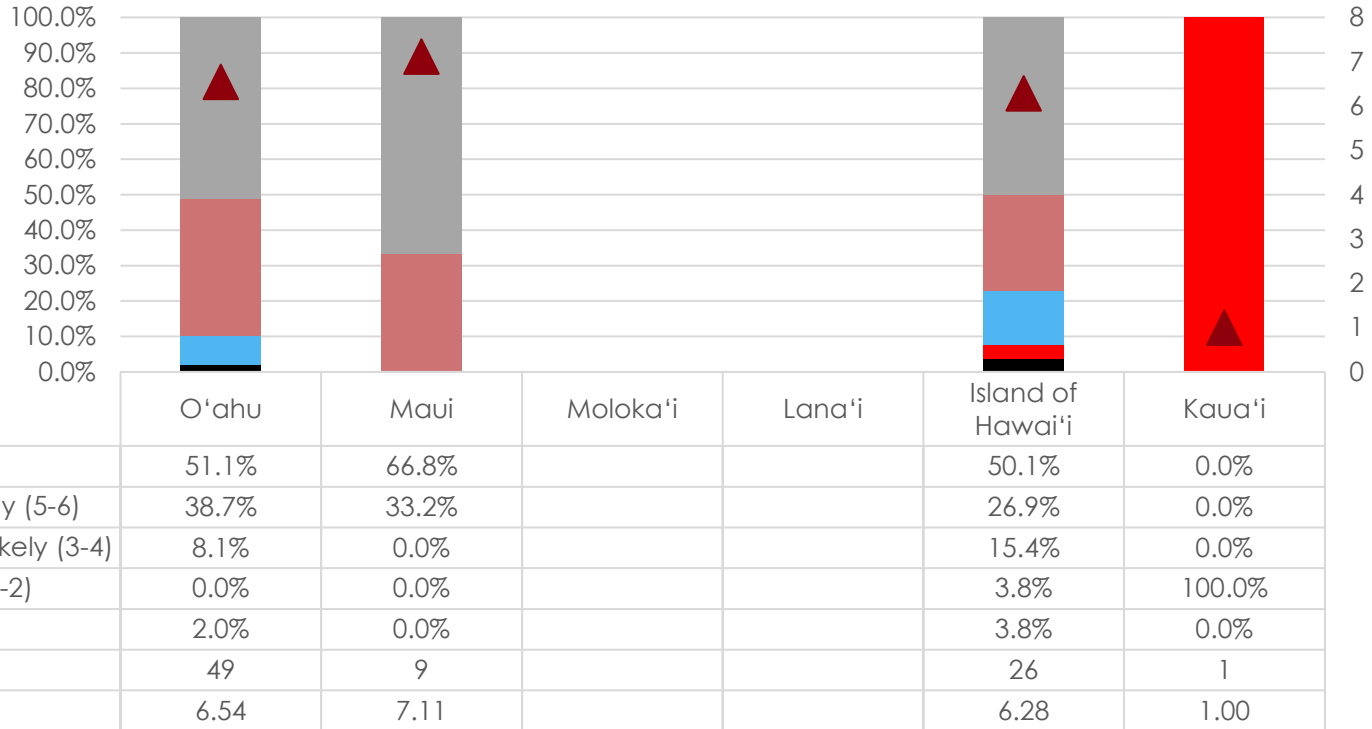


# TRAVEL PARTY MEMBERS – CHINA

	2016	2017	2018	2019	2020
<b>Spouse</b>	47.6%	50.4%	45.3%	37.8%	57.5%
<b>Other adult family</b>	21.0%	21.0%	25.0%	20.3%	31.5%
<b>Child under 18</b>	15.0%	14.2%	22.4%	15.9%	27.3%
<b>Friends/ associates</b>	21.5%	25.2%	24.3%	29.8%	20.5%
<b>Alone</b>	13.9%	10.7%	8.5%	11.0%	5.5%
<b>Girlfriend/ boyfriend</b>	4.1%	3.1%	9.7%	9.7%	6.9%
<b>Same sex partner</b>	1.8%	1.8%	2.2%	1.5%	-

# LIKELIHOOD OF RETURN VISIT – CHINA

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





# BRAND/DESTINATION ADVOCACY – CHINA

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



	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Very likely (7-8)	55.2%	77.9%			53.9%	0.0%
■ Somewhat likely (5-6)	38.7%	22.1%			23.1%	0.0%
■ Somewhat unlikely (3-4)	6.1%	0.0%			11.6%	100.0%
■ Very unlikely (1-2)	0.0%	0.0%			7.7%	0.0%
■ Not sure	0.0%	0.0%			3.8%	0.0%
BASE	49	9			26	1
▲ MEAN	6.63	7.45			6.20	4.00

337 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

## ACTIVITIES – SIGHTSEEING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	91.8%	100.0%	0.0%	0.0%	100.0%	100.0%
<b>On own (self guided)</b>	49.0%	88.9%	0.0%	0.0%	53.8%	0.0%
<b>Helicopter/ airplane</b>	4.1%	0.0%	0.0%	0.0%	69.2%	0.0%
<b>Boat/ submarine/ whale</b>	28.5%	33.2%	0.0%	0.0%	11.5%	100.0%
<b>Visit towns</b>	18.3%	33.4%	0.0%	0.0%	34.5%	100.0%
<b>Limo/ van/ bus tour</b>	18.3%	0.0%	0.0%	0.0%	19.2%	100.0%
<b>Scenic views/ natural landmark</b>	71.4%	77.7%	0.0%	0.0%	15.3%	100.0%
<b>Movie/ TV/ film location</b>	24.5%	22.1%	0.0%	0.0%	65.3%	100.0%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	97.2%	95.7%	96.0%	94.5%
<b>On own (self guided)</b>	63.5%	59.6%	55.6%	56.2%
<b>Helicopter/ airplane</b>	14.3%	22.8%	20.8%	27.4%
<b>Boat/ submarine/ whale</b>	30.4%	27.6%	27.4%	27.3%
<b>Visit towns</b>	20.7%	31.3%	30.9%	28.7%
<b>Limo/ van/ bus tour</b>	22.0%	18.4%	14.8%	20.5%
<b>Scenic views/ natural landmark</b>	65.5%	56.3%	46.3%	60.2%
<b>Movie/ TV/ film location</b>	21.3%	29.6%	28.4%	39.7%

# ACTIVITIES – RECREATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	93.9%	100.0%	0.0%	0.0%	100.0%	100.0%
<b>Beach/ sunbathing</b>	73.4%	88.7%	0.0%	0.0%	80.7%	0.0%
<b>Bodyboard</b>	2.0%	0.0%	0.0%	0.0%	3.9%	0.0%
<b>Standup paddle board</b>	2.0%	0.0%	0.0%	0.0%	3.9%	0.0%
<b>Surfing</b>	6.1%	0.0%	0.0%	0.0%	3.9%	0.0%
<b>Canoeing/ kayak</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Swim ocean</b>	26.5%	44.3%	0.0%	0.0%	26.9%	0.0%
<b>Snorkel</b>	12.3%	44.3%	0.0%	0.0%	26.9%	0.0%
<b>Freediving</b>	8.1%	11.1%	0.0%	0.0%	7.7%	0.0%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fishing</b>	2.0%	0.0%	0.0%	0.0%	3.8%	0.0%
<b>Golf</b>	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	94.7%	94.1%	93.5%	95.9%
<b>Beach/ sunbathing</b>	81.9%	75.1%	71.3%	78.0%
<b>Bodyboard</b>	6.2%	4.0%	2.4%	2.8%
<b>Standup paddle board</b>	*	*	*	2.8%
<b>Surfing</b>	7.6%	7.9%	6.7%	5.5%
<b>Canoeing/ kayak</b>	3.9%	3.8%	3.1%	0.0%
<b>Swim ocean</b>	NA	39.2%	34.3%	27.4%
<b>Snorkel</b>	NA	21.0%	22.6%	21.9%
<b>Freediving</b>	NA	NA	NA	9.6%
<b>Windsurf/ Kitesurf</b>	1.3%	1.9%	0.9%	0.0%
<b>Jet ski/ Parasail</b>	2.3%	1.1%	1.1%	1.4%
<b>Scuba</b>	4.5%	3.6%	4.1%	1.4%
<b>Fishing</b>	4.1%	4.9%	3.5%	2.7%
<b>Golf</b>	2.8%	5.7%	4.2%	2.7%

341 Q During this trip, which of the following activities did you participate in?

\* Combined with bodyboarding

# ACTIVITIES – RECREATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.9%	100.0%	0.0%	0.0%	100.0%	100.0%
<b>Run/ Jog/ Fitness walk</b>	20.4%	44.5%	0.0%	0.0%	11.5%	0.0%
<b>Spa</b>	2.0%	11.1%	0.0%	0.0%	0.0%	0.0%
<b>Hiking/</b>	36.7%	44.3%	0.0%	0.0%	38.5%	0.0%
<b>Backpack/Camp</b>	4.1%	11.1%	0.0%	0.0%	11.6%	0.0%
<b>Agritourism</b>	24.4%	22.1%	0.0%	0.0%	26.8%	0.0%
<b>Sport event/ tournament</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	38.8%	22.3%	0.0%	0.0%	46.1%	100.0%
<b>Waterpark</b>	10.2%	0.0%	0.0%	0.0%	7.7%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zip lining</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	12.2%	22.1%	0.0%	0.0%	3.9%	0.0%
<b>Horseback riding</b>	4.1%	0.0%	0.0%	0.0%	7.7%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	94.7%	94.1%	93.5%	95.9%
<b>Run/ Jog/ Fitness walk</b>	22.4%	20.6%	13.7%	20.5%
<b>Spa</b>	2.6%	5.5%	6.4%	2.7%
<b>Hiking</b>	20.4%	13.7%	31.7%	38.4%
<b>Backpack/Camp</b>	*	*	4.3%	6.9%
<b>Agritourism</b>	24.5%	17.3%	17.1%	26.0%
<b>Sport event/ tournament</b>	2.2%	1.7%	1.3%	0.0%
<b>Park/ botanical garden</b>	50.2%	41.1%	32.1%	42.4%
<b>Waterpark</b>	NA	13.1%	9.9%	9.6%
<b>Mountain tube/ waterfall rappel</b>	NA	1.5%	0.8%	0.0%
<b>Zip lining</b>	NA	1.9%	1.3%	0.0%
<b>Skydiving</b>	NA	10.9%	5.4%	2.8%
<b>All terrain vehicle (ATV)</b>	NA	7.3%	7.9%	12.3%
<b>Horseback riding</b>	NA	11.1%	6.6%	5.5%

\* Combined with hiking

## ACTIVITIES – ENTERTAINMENT & DINING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	95.9%	100.0%	0.0%	0.0%	96.2%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	45.0%	44.5%	0.0%	0.0%	73.2%	0.0%
<b>Live music/ stage show</b>	16.4%	0.0%	0.0%	0.0%	11.6%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fine dining</b>	40.9%	33.2%	0.0%	0.0%	42.3%	0.0%
<b>Family restaurant</b>	30.6%	0.0%	0.0%	0.0%	34.6%	0.0%
<b>Fast food</b>	48.9%	44.3%	0.0%	0.0%	38.4%	100.0%
<b>Food truck</b>	12.3%	22.1%	0.0%	0.0%	11.6%	0.0%
<b>Café/ coffee house</b>	34.7%	11.1%	0.0%	0.0%	26.9%	0.0%
<b>Ethnic dining</b>	28.5%	55.5%	0.0%	0.0%	15.4%	0.0%
<b>Prepared own meal</b>	16.3%	33.2%	0.0%	0.0%	26.9%	0.0%



# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	95.5%	96.1%	95.9%	95.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	56.3%	60.7%	56.6%	54.9%
<b>Live music/ stage show</b>	24.3%	16.2%	14.9%	15.1%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.7%	9.7%	10.7%	1.4%
<b>Fine dining</b>	52.3%	47.6%	47.4%	42.5%
<b>Family restaurant</b>	21.6%	19.1%	23.4%	31.5%
<b>Fast food</b>	48.9%	43.5%	43.5%	49.3%
<b>Food truck</b>	NA	18.4%	22.9%	15.1%
<b>Café/ coffee house</b>	28.6%	37.3%	35.5%	30.1%
<b>Ethnic dining</b>	20.4%	18.5%	22.1%	30.1%
<b>Prepared own meal</b>	21.3%	18.0%	20.7%	24.7%

## ACTIVITIES – SHOPPING – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	93.9%	100.0%	0.0%	0.0%	96.2%	100.0%
<b>Mall/ department store</b>	67.4%	55.5%	0.0%	0.0%	53.8%	0.0%
<b>Designer boutique</b>	4.1%	11.1%	0.0%	0.0%	0.0%	0.0%
<b>Hotel/ resort store</b>	12.2%	22.1%	0.0%	0.0%	30.7%	0.0%
<b>Swap meet/ flea market</b>	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%
<b>Discount/ outlet store</b>	36.6%	44.5%	0.0%	0.0%	23.1%	0.0%
<b>Supermarket</b>	67.4%	66.6%	0.0%	0.0%	69.0%	0.0%
<b>Farmer's market</b>	8.2%	22.1%	0.0%	0.0%	19.2%	0.0%
<b>Convenience store</b>	38.7%	44.3%	0.0%	0.0%	42.3%	100.0%
<b>Duty free store</b>	51.1%	33.4%	0.0%	0.0%	34.6%	0.0%
<b>Local shop/ artisan</b>	22.5%	11.1%	0.0%	0.0%	27.0%	0.0%

# STATEWIDE - ACTIVITIES – SHOPPING – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	97.2%	93.9%	93.2%	95.9%
<b>Mall/ department store</b>	78.7%	66.5%	62.3%	68.5%
<b>Designer boutique</b>	13.7%	9.0%	11.8%	4.1%
<b>Hotel/ resort store</b>	18.6%	24.7%	22.8%	20.5%
<b>Swap meet/ flea market</b>	6.6%	4.4%	5.3%	1.4%
<b>Discount/ outlet store</b>	34.0%	40.7%	41.7%	34.2%
<b>Supermarket</b>	40.6%	62.2%	59.9%	69.8%
<b>Farmer's market</b>	13.3%	13.1%	13.3%	15.1%
<b>Convenience store</b>	44.3%	42.2%	42.2%	45.2%
<b>Duty free store</b>	61.4%	50.7%	54.8%	48.0%
<b>Local shop/ artisan</b>	29.7%	24.8%	29.4%	23.3%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	79.5%	55.5%	0.0%	0.0%	76.9%	100.0%
<b>Historic military site</b>	61.2%	22.1%	0.0%	0.0%	42.2%	0.0%
<b>Other historical site</b>	26.6%	22.3%	0.0%	0.0%	23.1%	100.0%
<b>Museum/ art gallery</b>	22.4%	22.1%	0.0%	0.0%	15.4%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	12.2%	0.0%	0.0%	0.0%	7.7%	0.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.1%	0.0%	0.0%	0.0%	7.7%	0.0%
<b>Play/ concert/ theatre</b>	2.0%	0.0%	0.0%	0.0%	3.8%	0.0%
<b>Art/ craft fair</b>	8.1%	11.1%	0.0%	0.0%	26.9%	0.0%
<b>Festival event</b>	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	84.6%	80.9%	78.7%	78.0%
<b>Historic military site</b>	67.6%	51.9%	43.0%	52.0%
<b>Other historical site</b>	23.1%	28.6%	27.3%	28.8%
<b>Museum/ art gallery</b>	23.9%	15.9%	21.8%	21.9%
<b>Luau/ Polynesian show/ hula show</b>	17.9%	13.2%	16.4%	9.6%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	3.5%	10.7%	11.7%	5.5%
<b>Play/ concert/ theatre</b>	5.2%	3.8%	3.8%	2.7%
<b>Art/ craft fair</b>	7.0%	11.7%	11.6%	13.7%
<b>Festival event</b>	3.6%	1.8%	1.8%	2.7%

# ACTIVITIES – TRANSPORTATION – CHINA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	81.6%	100.0%	0.0%	0.0%	88.4%	100.0%
<b>Airport shuttle</b>	12.3%	11.3%	0.0%	0.0%	7.7%	0.0%
<b>Trolley</b>	6.1%	0.0%	0.0%	0.0%	3.8%	0.0%
<b>Public bus</b>	20.4%	0.0%	0.0%	0.0%	7.7%	0.0%
<b>Tour bus/ tour van</b>	10.2%	0.0%	0.0%	0.0%	11.5%	100.0%
<b>Taxi/ limo</b>	24.5%	0.0%	0.0%	0.0%	11.5%	0.0%
<b>Rental car</b>	36.7%	100.0%	0.0%	0.0%	69.3%	0.0%
<b>Ride share</b>	18.4%	0.0%	0.0%	0.0%	11.6%	0.0%
<b>Bicycle rental</b>	2.0%	0.0%	0.0%	0.0%	3.8%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – CHINA

	2017	2018	2019	2020
<b>TOTAL</b>	98.1%	92.7%	84.4%	84.9%
<b>Airport shuttle</b>	31.9%	19.5%	13.5%	11.0%
<b>Trolley</b>	3.4%	8.0%	4.9%	5.5%
<b>Public bus</b>	18.6%	18.8%	15.0%	16.5%
<b>Tour bus/ tour van</b>	35.6%	24.6%	21.8%	12.3%
<b>Taxi/ limo</b>	23.2%	24.6%	21.0%	20.5%
<b>Rental car</b>	44.8%	51.9%	46.9%	54.8%
<b>Ride share</b>	NA	14.7%	14.4%	15.1%
<b>Bicycle rental</b>	NA	3.2%	2.4%	1.4%

## ACTIVITIES – OTHER – CHINA

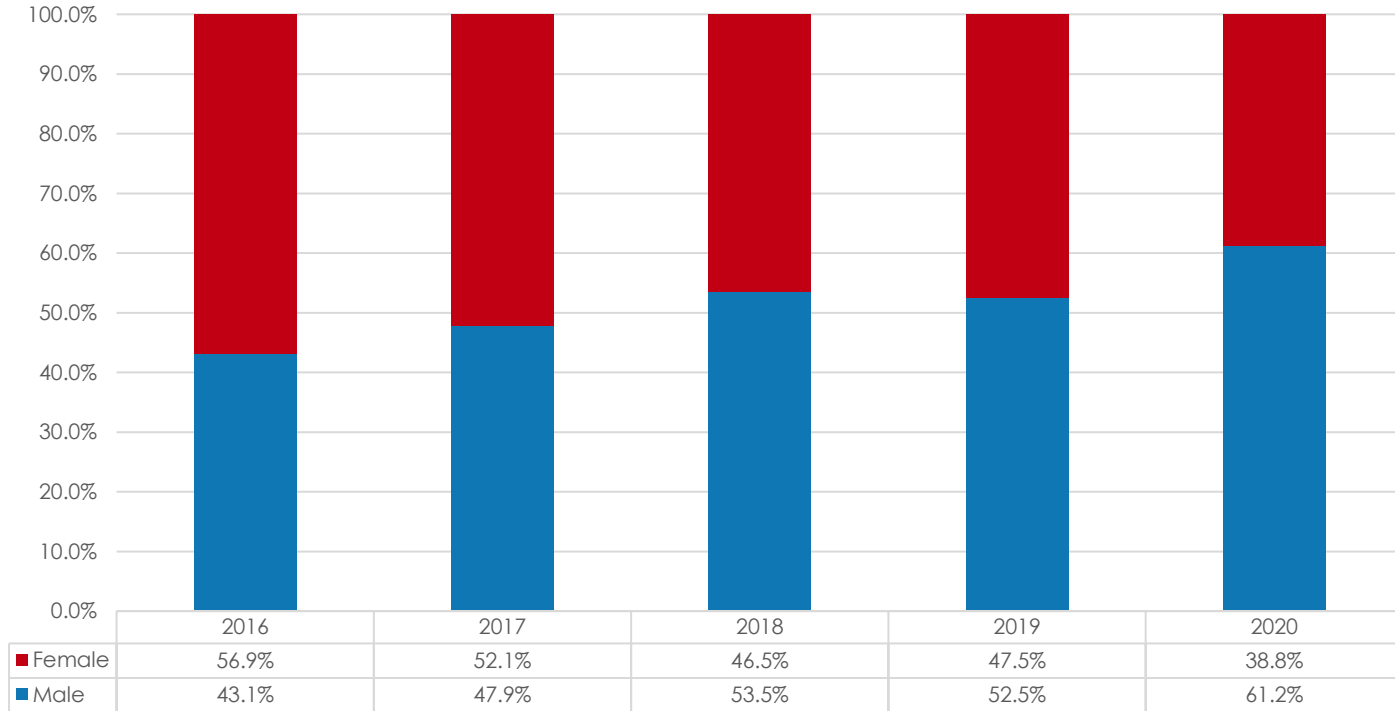
	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWA'I	KAUA'I
<b>TOTAL</b>	16.3%	11.1%	0.0%	0.0%	15.4%	0.0%
<b>Visit friends/ family</b>	16.3%	11.1%	0.0%	0.0%	15.4%	0.0%
<b>Volunteer non profit</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%



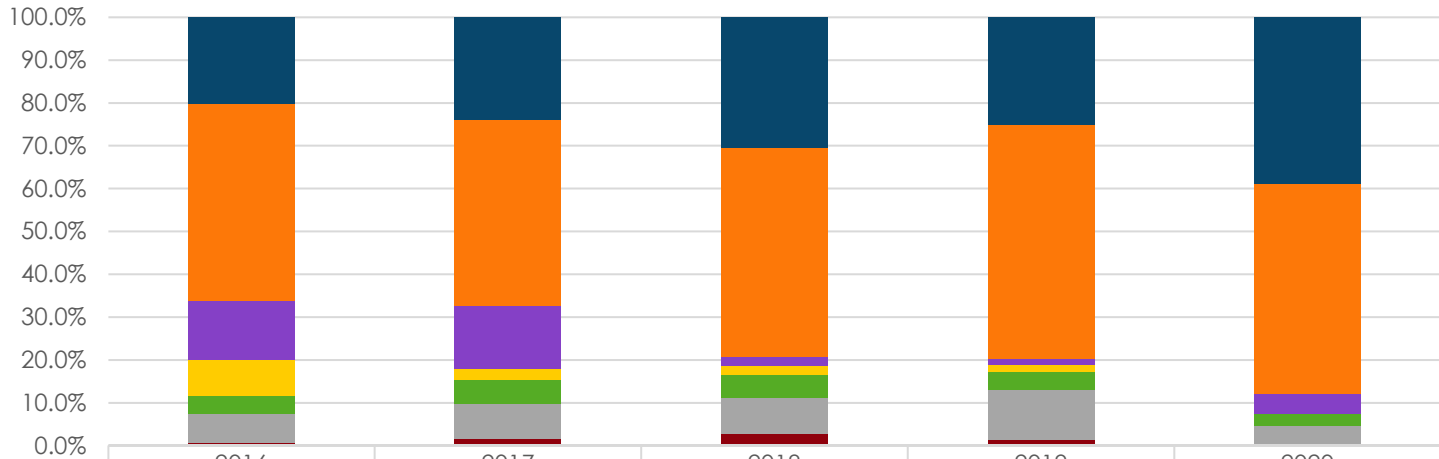
## ACTIVITIES – OTHER – CHINA

	2018	2019	2020
<b>TOTAL</b>	19.6%	19.0%	15.1%
<b>Visit friends/ family</b>	17.7%	16.9%	15.1%
<b>Volunteer non profit</b>	2.5%	2.8%	0.0%

# VISITOR PROFILE – GENDER – CHINA

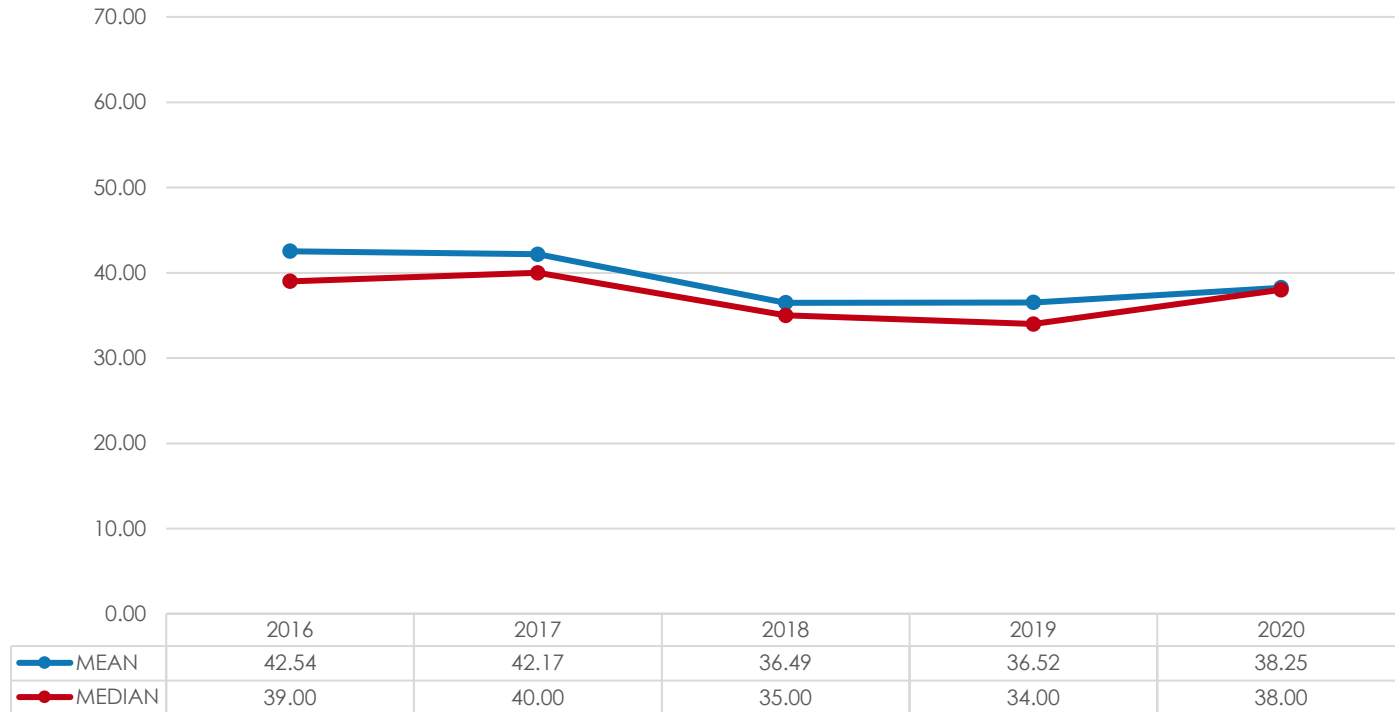


# VISITOR PROFILE – EDUCATION – CHINA

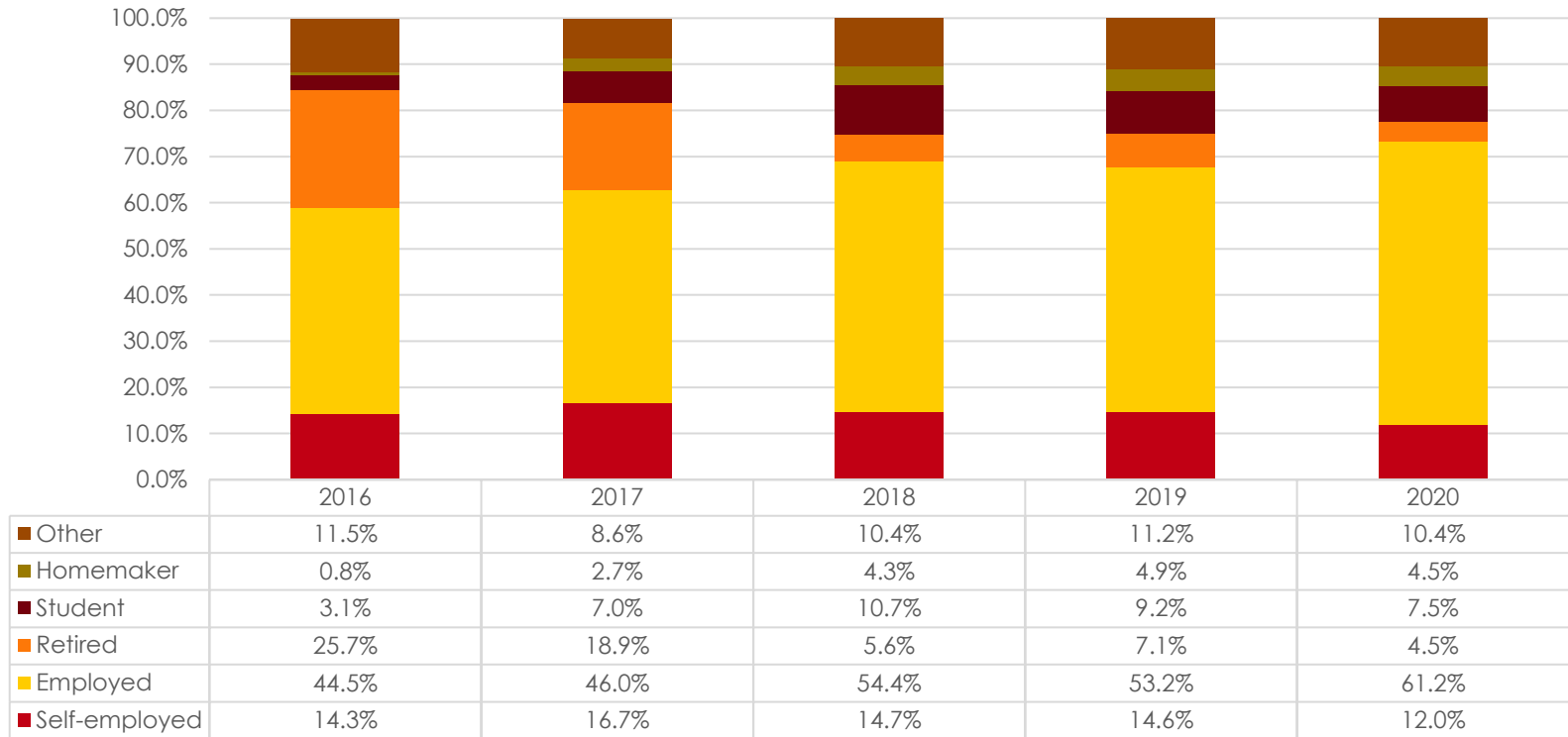


	2016	2017	2018	2019	2020
Post-Graduate	20.1%	23.9%	30.4%	25.1%	38.9%
College Grad	46.0%	43.4%	48.8%	54.6%	49.2%
Associate Degree	13.7%	14.8%	2.3%	1.5%	4.5%
Vocational/ Tech	8.5%	2.4%	2.0%	1.5%	0.0%
Some College	4.2%	5.8%	5.2%	4.2%	3.0%
H.S. Grad	6.7%	8.1%	8.5%	11.8%	4.5%
Some / No H.S.	0.7%	1.6%	2.8%	1.3%	0.0%

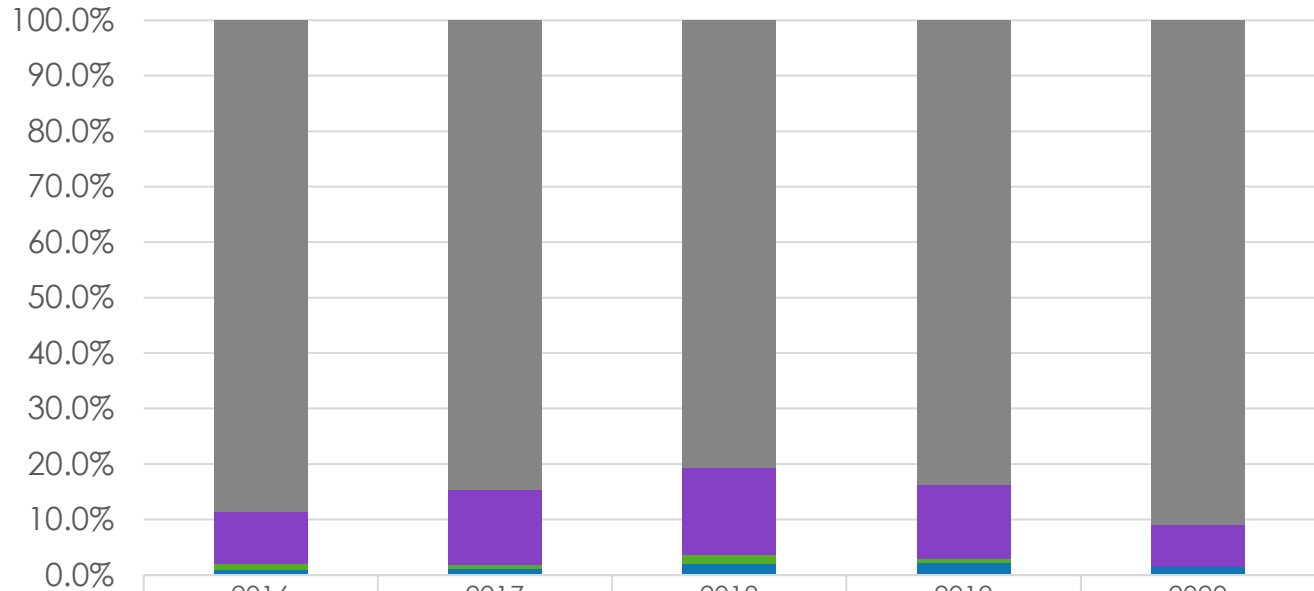
# VISITOR PROFILE – AGE – CHINA



# VISITOR PROFILE – EMPLOYMENT STATUS – CHINA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – CHINA



	2016	2017	2018	2019	2020
Do not nor plan to purchase	88.6%	84.6%	80.7%	83.8%	91.0%
Plan to in future	9.4%	13.6%	15.8%	13.3%	7.5%
Other Property Type	1.1%	0.6%	1.6%	0.7%	0.0%
Timeshare	1.0%	1.2%	2.0%	2.2%	1.5%

# VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	2018	2019	2020
< ¥250,799	30.4%	33.1%	13.8%
¥250,800 – ¥376,099	23.0%	23.1%	24.6%
¥376,100 – ¥501,399	15.4%	15.5%	13.9%
¥501,400 – ¥626,799	8.0%	7.7%	9.2%
¥626,800 – ¥783,499	5.4%	4.4%	12.3%
¥783,500 – ¥940,199	6.3%	5.6%	7.7%
¥940,200 – ¥1,096,899	2.8%	2.8%	4.6%
¥1,096,900 – ¥1,253,599	3.2%	2.2%	-
¥1,253,600 – ¥1,560,799	1.8%	1.5%	4.6%
¥1,560,800+	3.7%	4.3%	9.2%

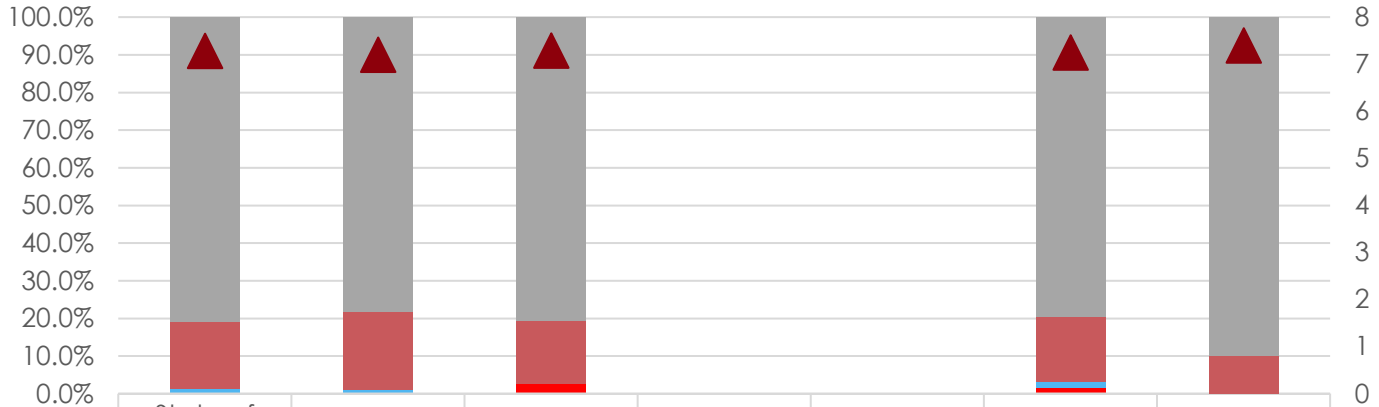
Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – KOREA



# OVERALL SATISFACTION – MOST RECENT VISIT – KOREA

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



	State of Hawai'i Overall	O'ahu	Maui	Moloka'i	Lana'i	Island of Hawai'i	Kaua'i
■ Excellent (7-8)	80.7%	78.2%	80.5%			79.7%	90.1%
■ Above Average (5-6)	18.0%	20.8%	17.0%			17.2%	9.9%
■ Below Average (3-4)	1.3%	1.0%	0.0%			1.6%	0.0%
■ Poor (1-2)	0.0%	0.0%	2.5%			1.6%	0.0%
BASE	306	289	41			64	10
▲ MEAN	7.28	7.20	7.29			7.25	7.40

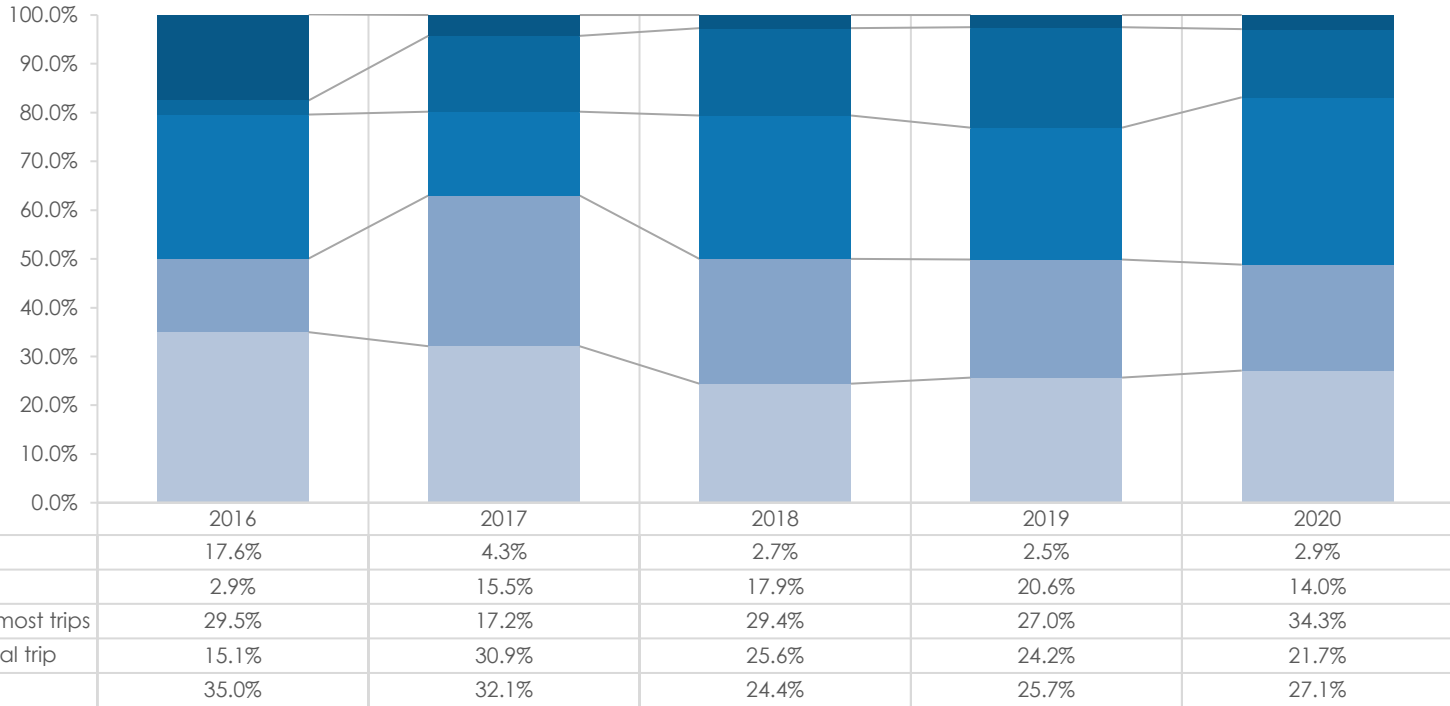
# PRIMARY TRIP PURPOSE KOREA

	2018	2019	2020
Vacation	52.7%	52.3%	61.2%
Honeymoon	28.9%	32.8%	27.0%
Attend school	1.5%	-	3.3%
Visit friends/ relatives	3.1%	1.0%	2.3%
Convention/ Conference	2.0%	1.1%	2.0%
Get married/ vow renewal	2.4%	3.0%	1.3%
Anniversary/ birthday	3.8%	2.8%	0.7%
Incentive/ Reward	3.1%	1.7%	0.3%

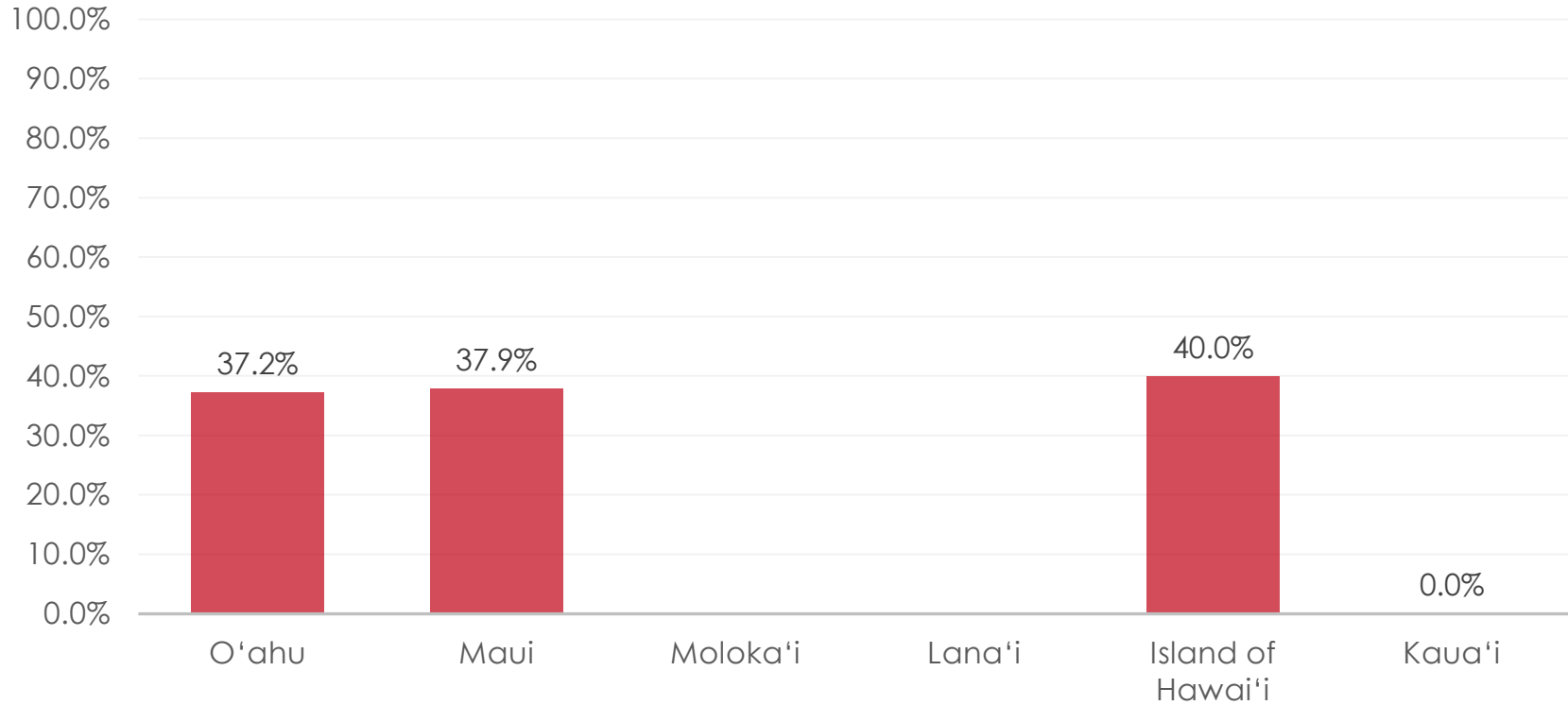
# SECONDARY TRIP PURPOSE – MULTIPLE RESPONSE KOREA

	2018	2019	2020
Vacation	80.0%	77.5%	82.7%
Honeymoon	31.6%	36.2%	28.0%
Visit friends/ relatives	2.7%	2.5%	5.9%
Attend school	2.2%	-	3.9%
Get married/ vow renewal	5.8%	7.6%	3.3%
Incentive trip	6.9%	4.0%	2.3%
Convention/ conference	2.7%	1.4%	2.0%
Shopping/ fashion	13.9%	14.9%	1.0%
Anniversary/ birthday	11.2%	10.8%	1.3%

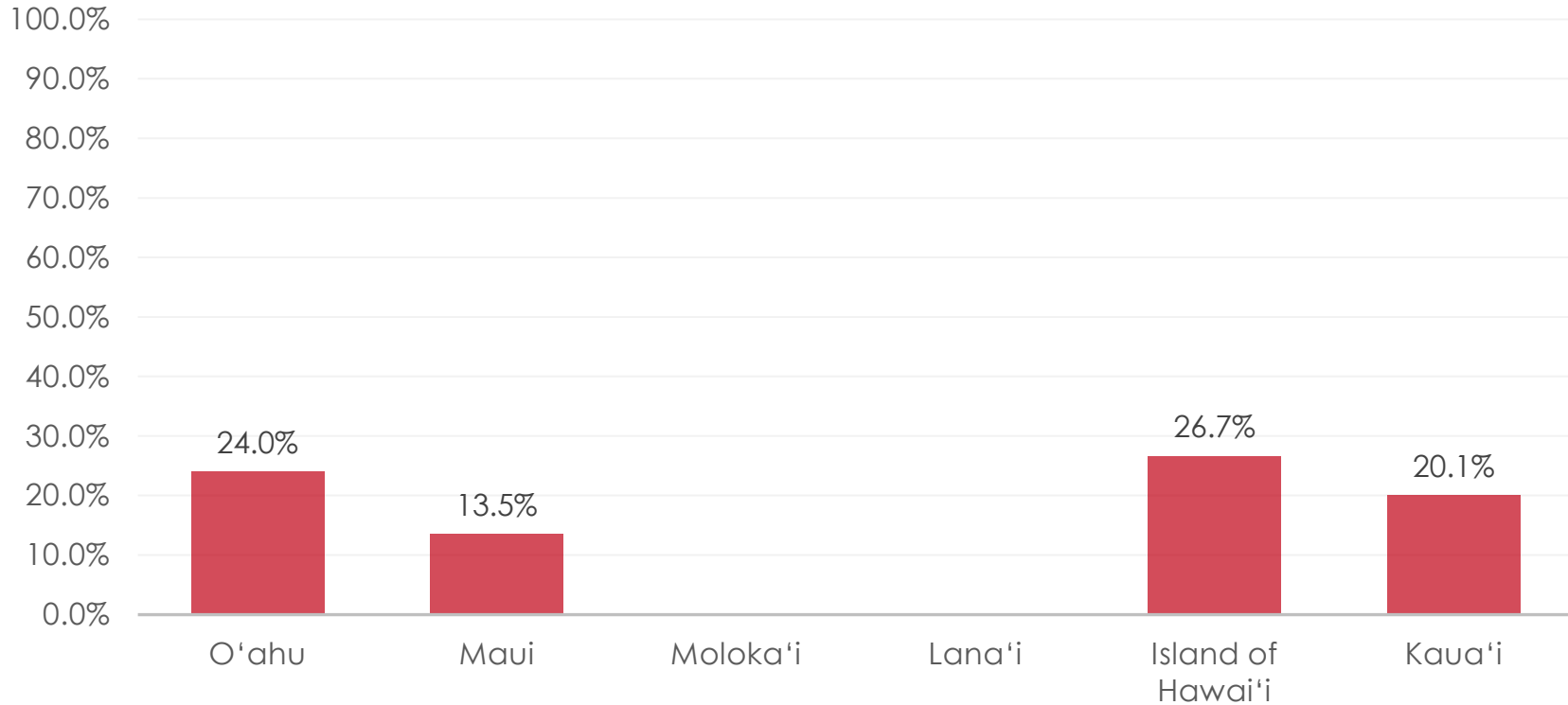
# VACATION TRIP DESCRIPTION – KOREA



# ADVERTISING AWARENESS – KOREA

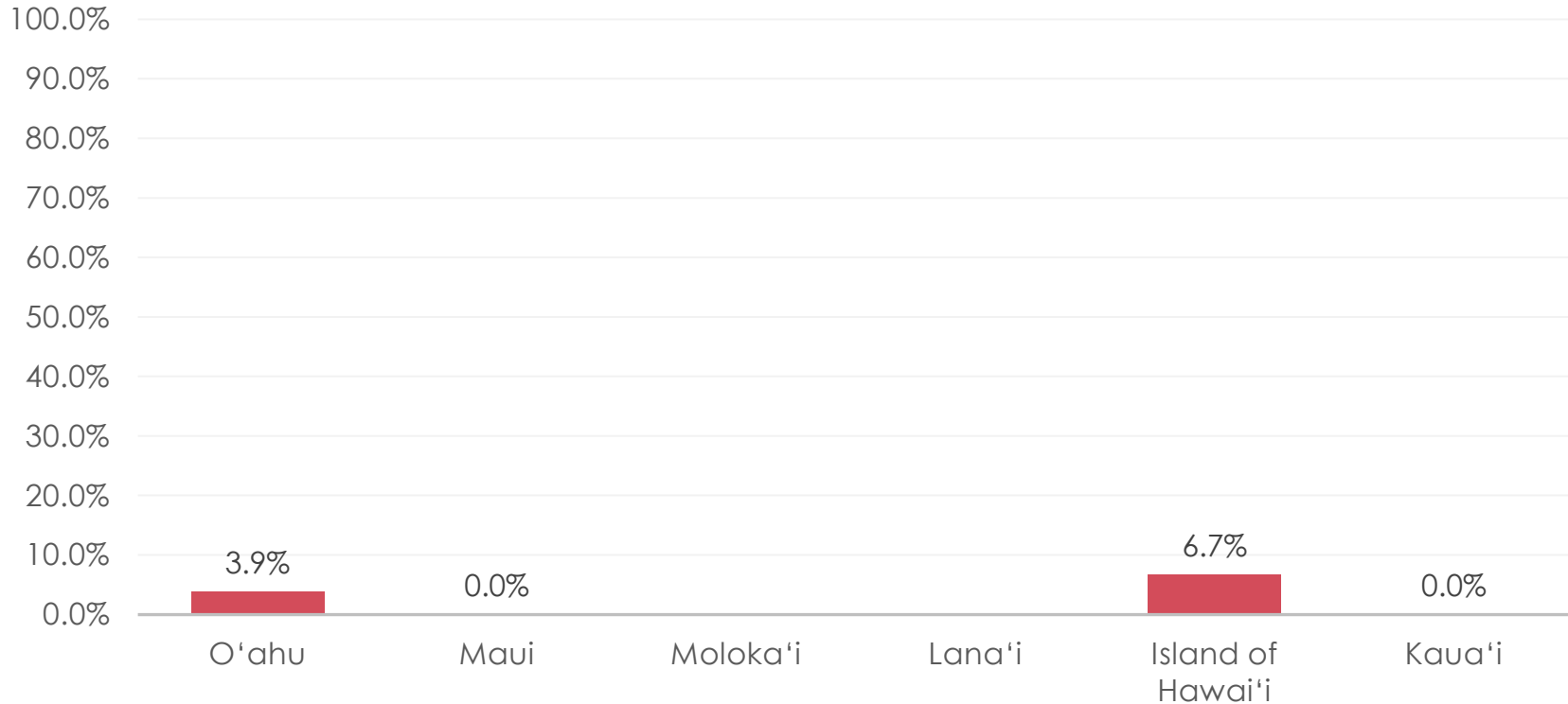


# IMPACT OF LOCATION FILMING – KOREA



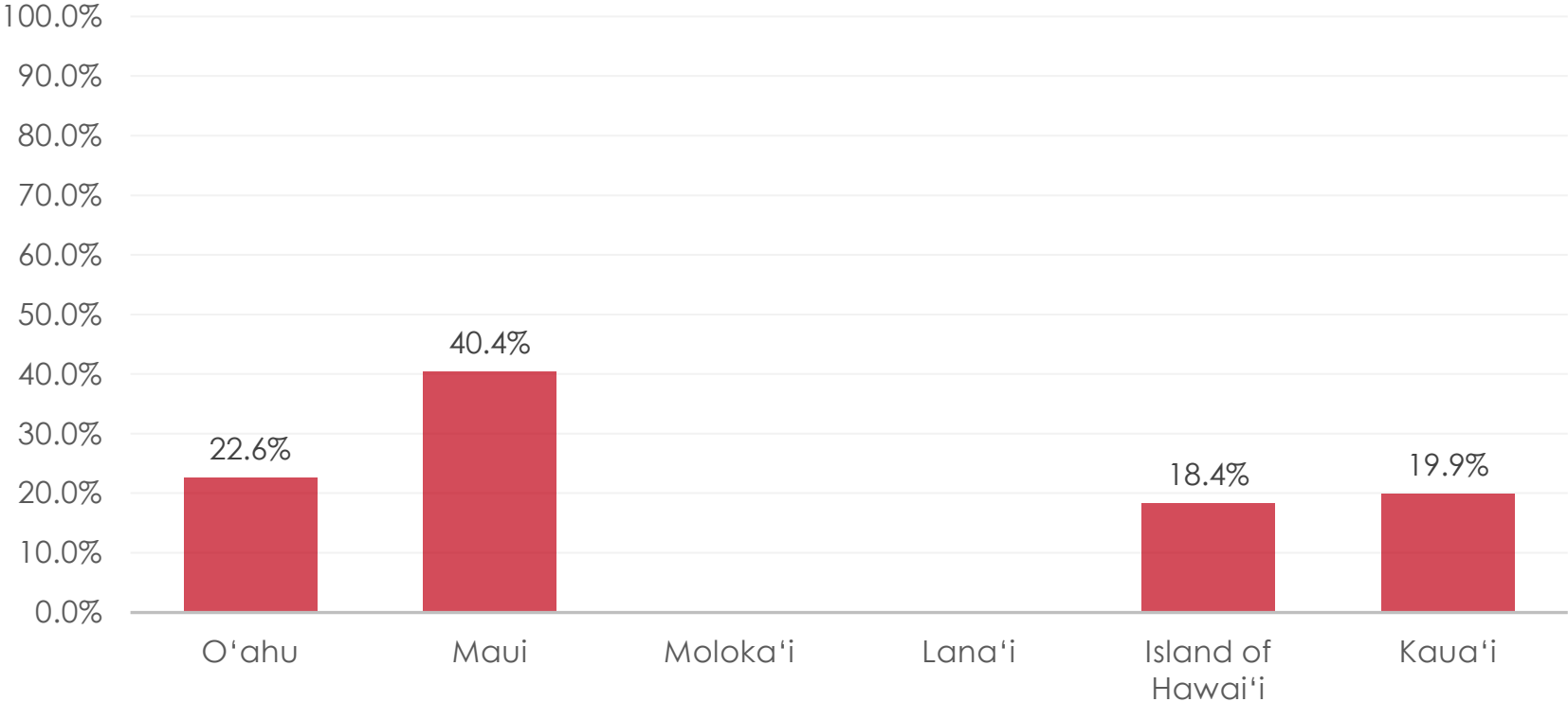
366 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF HAWAIIAN MUSIC – KOREA



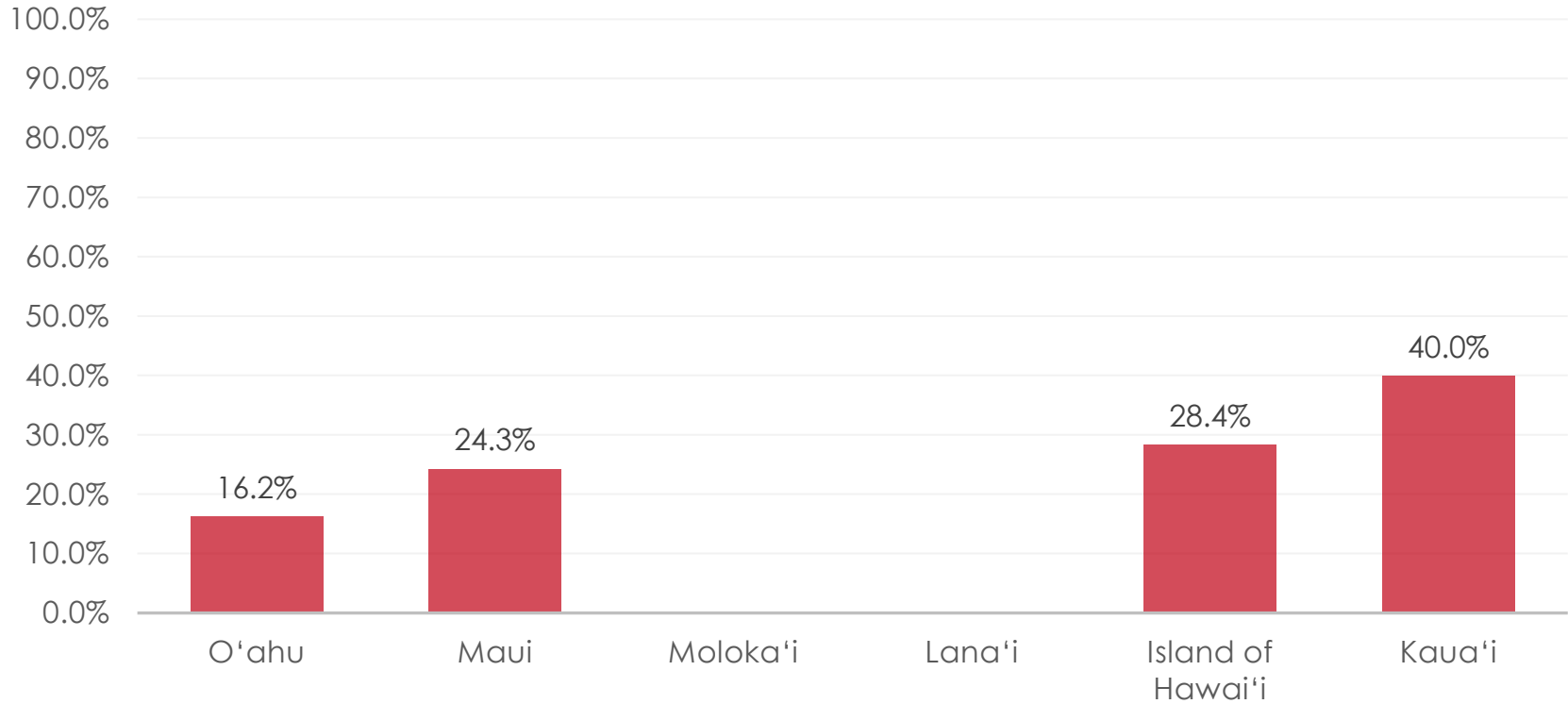
367 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – KOREA

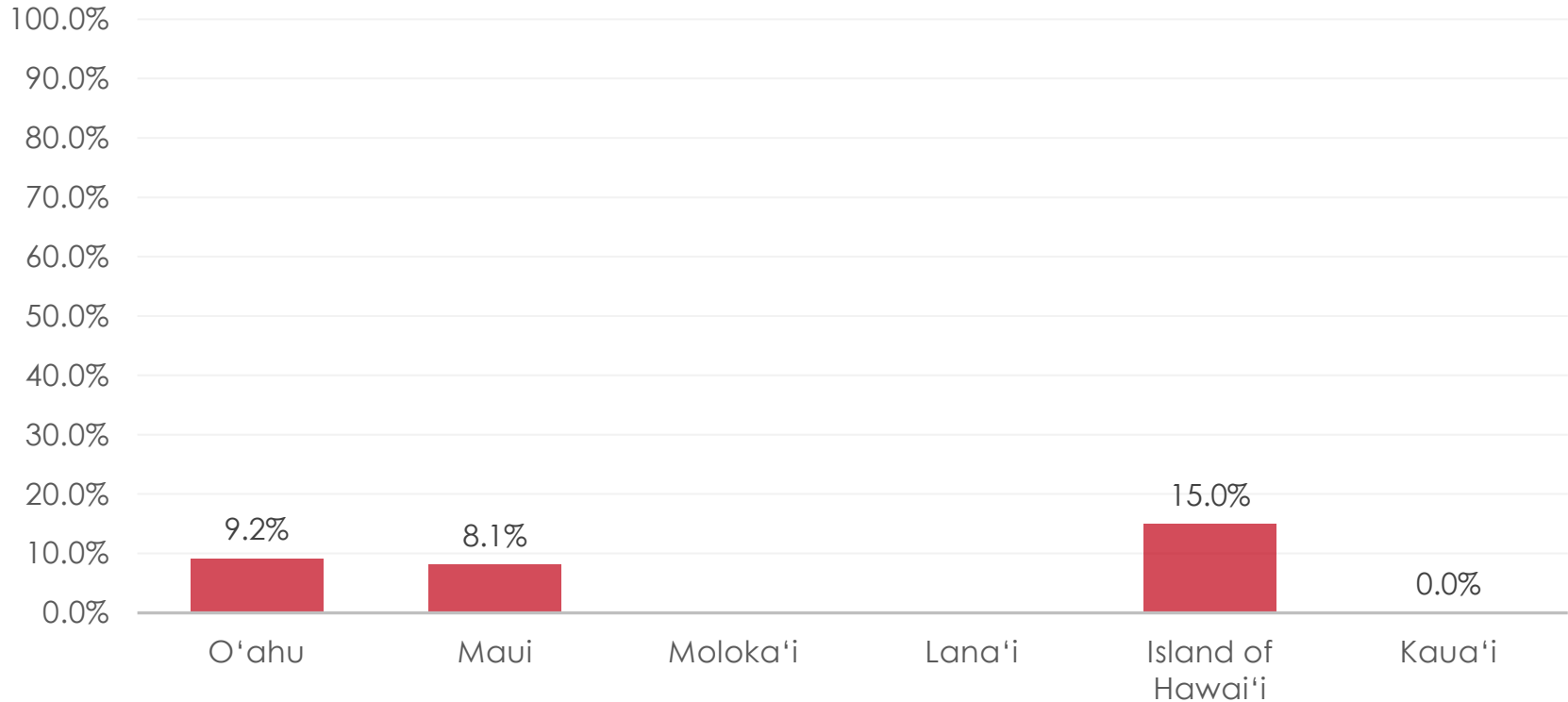




# IMPACT OF OUTDOOR/ SPORTING EVENTS – KOREA

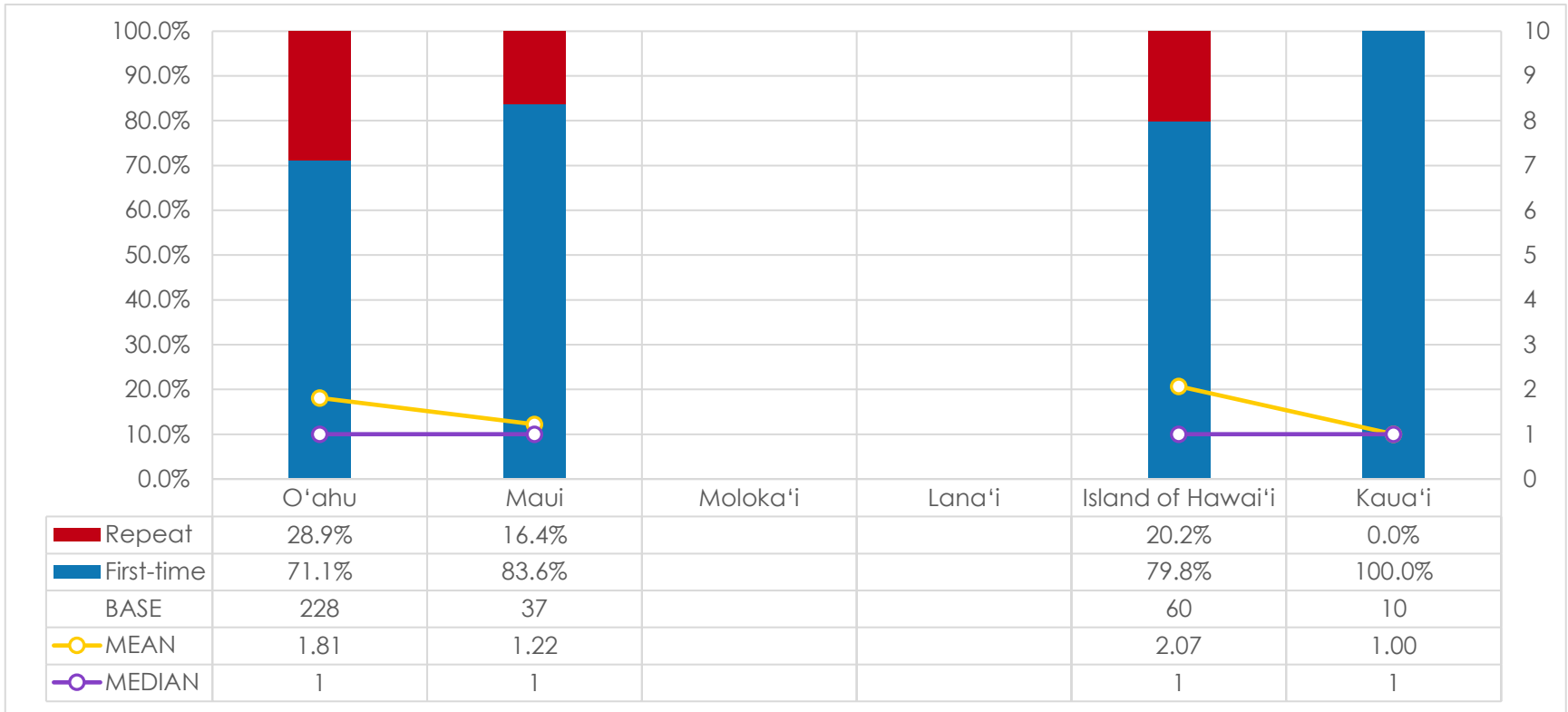


# IMPACT OF HAWAIIAN CULTURAL EVENTS – KOREA



370 Q. Which of the following, if any, motivated you to visit the island of \_\_\_?

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – KOREA



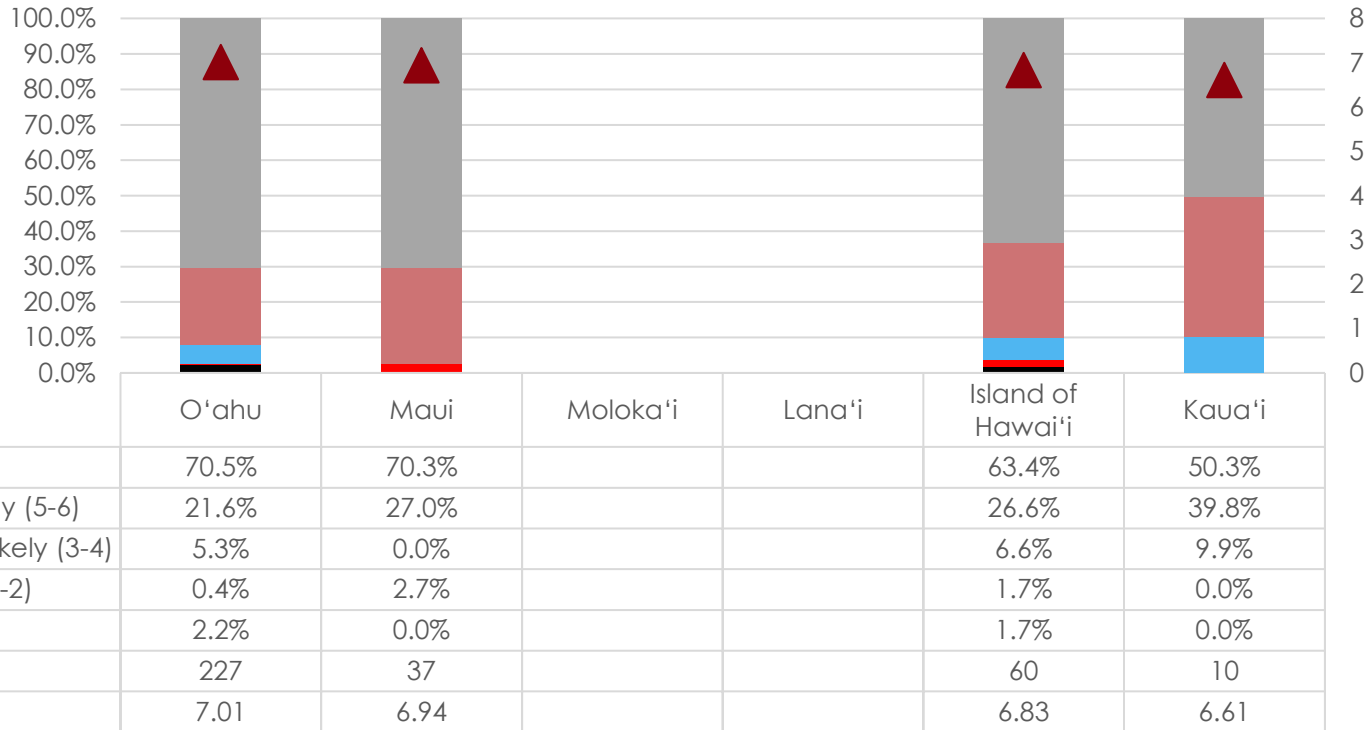
371 Q Including this trip, how many times have you visited \_\_\_?

# TRAVEL PARTY MEMBERS – KOREA

	2016	2017	2018	2019	2020
<b>Spouse</b>	65.0%	68.7%	62.0%	66.6%	56.2%
<b>Other adult family</b>	18.2%	17.2%	16.4%	20.8%	34.3%
<b>Child under 18</b>	11.6%	17.4%	14.6%	13.3%	18.7%
<b>Friends/ associates</b>	13.8%	12.2%	14.2%	11.2%	9.8%
<b>Alone</b>	4.5%	4.7%	3.1%	3.4%	4.6%
<b>Girlfriend/ boyfriend</b>	3.5%	2.5%	7.4%	2.1%	0.3%
<b>Same sex partner</b>	.3%	.3%	0.2%	0.0%	-

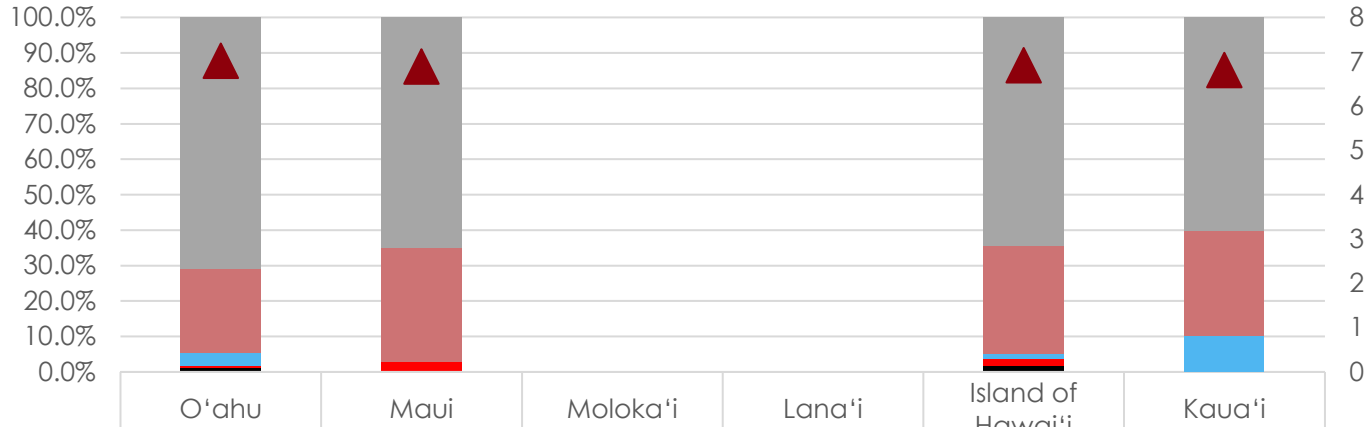
# LIKELIHOOD OF RETURN VISIT – KOREA

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



# BRAND/DESTINATION ADVOCACY – KOREA

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



■ Very likely (7-8)	70.8%	64.9%			64.5%	60.2%
■ Somewhat likely (5-6)	23.9%	32.4%			30.5%	29.8%
■ Somewhat unlikely (3-4)	3.5%	0.0%			1.7%	9.9%
■ Very unlikely (1-2)	0.4%	2.7%			1.7%	0.0%
■ Not sure	1.3%	0.0%			1.7%	0.0%
BASE	226	37			59	10
▲ MEAN	7.02	6.89			6.92	6.81

374 Q. How likely are you to recommend \_\_\_ as a place to visit to your friends and family?

## ACTIVITIES – SIGHTSEEING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	96.5%	100.0%	0.0%	0.0%	96.6%	100.0%
<b>On own (self guided)</b>	76.1%	83.7%	0.0%	0.0%	73.0%	60.0%
<b>Helicopter/ airplane</b>	1.8%	0.0%	0.0%	0.0%	3.4%	19.9%
<b>Boat/ submarine/ whale</b>	18.6%	21.6%	0.0%	0.0%	16.9%	29.8%
<b>Visit towns</b>	36.3%	32.4%	0.0%	0.0%	45.8%	20.1%
<b>Limo/ van/ bus tour</b>	18.6%	10.8%	0.0%	0.0%	22.0%	20.1%
<b>Scenic views/ natural landmark</b>	59.7%	59.5%	0.0%	0.0%	61.0%	60.0%
<b>Movie/ TV/ film location</b>	23.4%	8.1%	0.0%	0.0%	22.0%	20.2%

# STATEWIDE - ACTIVITIES – SIGHTSEEING - KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	98.6%	95.6%	97.3%	97.4%
<b>On own (self guided)</b>	72.7%	76.9%	76.0%	77.7%
<b>Helicopter/ airplane</b>	8.2%	5.4%	3.8%	2.3%
<b>Boat/ submarine/ whale</b>	13.4%	16.2%	16.9%	20.3%
<b>Visit towns</b>	14.4%	35.3%	34.9%	36.4%
<b>Limo/ van/ bus tour</b>	20.3%	15.3%	15.8%	18.3%
<b>Scenic views/ natural landmark</b>	53.1%	53.3%	53.3%	61.0%
<b>Movie/ TV/ film location</b>	13.0%	12.8%	16.1%	21.9%



# ACTIVITIES – RECREATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	99.1%	97.3%	0.0%	0.0%	100.0%	100.0%
<b>Beach/ sunbathing</b>	84.5%	83.7%	0.0%	0.0%	76.3%	59.9%
<b>Bodyboard</b>	1.3%	2.7%	0.0%	0.0%	5.1%	0.0%
<b>Standup paddle board</b>	6.6%	2.7%	0.0%	0.0%	8.5%	0.0%
<b>Surfing</b>	8.9%	8.1%	0.0%	0.0%	8.5%	19.9%
<b>Canoeing/ kayak</b>	3.5%	0.0%	0.0%	0.0%	3.4%	0.0%
<b>Swim ocean</b>	50.9%	35.1%	0.0%	0.0%	45.7%	20.1%
<b>Snorkel</b>	47.7%	45.8%	0.0%	0.0%	23.7%	29.8%
<b>Freediving</b>	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	2.7%	0.0%	0.0%	0.0%	0.0%	10.1%
<b>Fishing</b>	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	6.7%	5.4%	0.0%	0.0%	8.5%	10.1%

# STATEWIDE - ACTIVITIES – RECREATION – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	94.7%	97.9%	98.4%	99.0%
<b>Beach/ sunbathing</b>	71.8%	78.5%	75.2%	82.3%
<b>Bodyboard</b>	9.5%	6.7%	7.0%	2.0%
<b>Standup paddle board</b>	*	*	*	6.2%
<b>Surfing</b>	11.6%	10.7%	12.3%	9.2%
<b>Canoeing/ kayak</b>	6.1%	4.7%	5.8%	3.3%
<b>Swim ocean</b>	NA	49.0%	45.3%	49.2%
<b>Snorkel</b>	NA	45.4%	45.5%	44.8%
<b>Freediving</b>	NA	NA	NA	1.3%
<b>Windsurf/ Kitesurf</b>	1.0%	1.3%	0.7%	0.3%
<b>Jet ski/ Parasail</b>	7.7%	5.7%	5.2%	4.9%
<b>Scuba</b>	3.9%	3.9%	3.5%	2.3%
<b>Fishing</b>	2.2%	1.6%	1.5%	1.3%
<b>Golf</b>	3.5%	3.6%	3.0%	7.3%

\* Combined with bodyboarding

# ACTIVITIES – RECREATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	99.1%	97.3%	0.0%	0.0%	100.0%	100.0%
<b>Run/ Jog/ Fitness walk</b>	12.0%	10.8%	0.0%	0.0%	10.2%	20.1%
<b>Spa</b>	4.0%	2.7%	0.0%	0.0%	1.7%	0.0%
<b>Hiking/</b>	23.9%	32.5%	0.0%	0.0%	25.5%	40.3%
<b>Backpack/Camp</b>	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Agritourism</b>	27.4%	8.1%	0.0%	0.0%	32.2%	10.1%
<b>Sport event/ tournament</b>	1.8%	0.0%	0.0%	0.0%	1.7%	0.0%
<b>Park/ botanical garden</b>	25.7%	21.6%	0.0%	0.0%	25.5%	20.1%
<b>Waterpark</b>	3.5%	5.4%	0.0%	0.0%	1.7%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.9%	2.7%	0.0%	0.0%	1.7%	9.9%
<b>Zip lining</b>	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	2.2%	2.7%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	11.9%	0.0%	0.0%	0.0%	5.1%	0.0%
<b>Horseback riding</b>	1.8%	0.0%	0.0%	0.0%	3.4%	0.0%

# STATEWIDE - ACTIVITIES – RECREATION – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	94.7%	97.9%	98.4%	99.0%
<b>Run/ Jog/ Fitness walk</b>	6.8%	8.7%	9.2%	11.8%
<b>Spa</b>	6.4%	6.0%	7.7%	3.6%
<b>Hiking</b>	13.9%	13.5%	21.6%	25.3%
<b>Backpack/Camp</b>	*	*	1.8%	0.7%
<b>Agritourism</b>	18.8%	19.3%	21.3%	26.6%
<b>Sport event/ tournament</b>	2.3%	2.1%	1.5%	1.6%
<b>Park/ botanical garden</b>	23.6%	25.3%	24.9%	26.6%
<b>Waterpark</b>	NA	3.9%	2.9%	3.6%
<b>Mountain tube/ waterfall rappel</b>	NA	1.4%	0.8%	1.6%
<b>Zip lining</b>	NA	1.6%	1.2%	1.6%
<b>Skydiving</b>	NA	3.5%	2.9%	1.6%
<b>All terrain vehicle (ATV)</b>	NA	6.6%	10.8%	9.8%
<b>Horseback riding</b>	NA	3.4%	1.0%	1.6%

\* Combined with hiking

# ACTIVITIES – ENTERTAINMENT & DINING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	99.6%	94.5%	0.0%	0.0%	96.6%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	32.3%	32.4%	0.0%	0.0%	44.0%	50.1%
<b>Live music/ stage show</b>	15.5%	2.7%	0.0%	0.0%	18.6%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fine dining</b>	49.1%	35.1%	0.0%	0.0%	30.6%	19.9%
<b>Family restaurant</b>	51.8%	18.9%	0.0%	0.0%	47.5%	0.0%
<b>Fast food</b>	68.1%	40.5%	0.0%	0.0%	52.5%	50.1%
<b>Food truck</b>	68.5%	45.9%	0.0%	0.0%	37.2%	19.9%
<b>Café/ coffee house</b>	63.7%	37.7%	0.0%	0.0%	52.5%	50.1%
<b>Ethnic dining</b>	27.0%	18.9%	0.0%	0.0%	20.4%	20.1%
<b>Prepared own meal</b>	19.9%	10.8%	0.0%	0.0%	27.2%	40.0%

# STATEWIDE - ACTIVITIES – ENTERTAINMENT & DINING – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	97.5%	98.8%	98.0%	98.7%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	47.5%	37.0%	35.8%	35.7%
<b>Live music/ stage show</b>	15.3%	15.1%	14.5%	14.4%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.4%	9.0%	4.0%	4.9%
<b>Fine dining</b>	49.7%	55.2%	48.3%	44.6%
<b>Family restaurant</b>	50.0%	37.6%	37.0%	47.9%
<b>Fast food</b>	54.8%	50.2%	57.4%	62.6%
<b>Food truck</b>	NA	47.5%	52.1%	60.0%
<b>Café/ coffee house</b>	48.6%	54.4%	56.0%	59.7%
<b>Ethnic dining</b>	25.6%	24.6%	26.3%	25.0%
<b>Prepared own meal</b>	16.3%	11.3%	13.8%	21.3%

## ACTIVITIES – SHOPPING – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	97.8%	94.6%	0.0%	0.0%	89.8%	100.0%
<b>Mall/ department store</b>	87.2%	51.3%	0.0%	0.0%	77.9%	50.3%
<b>Designer boutique</b>	6.6%	2.7%	0.0%	0.0%	5.1%	0.0%
<b>Hotel/ resort store</b>	25.7%	16.2%	0.0%	0.0%	25.5%	0.0%
<b>Swap meet/ flea market</b>	3.6%	2.7%	0.0%	0.0%	1.7%	0.0%
<b>Discount/ outlet store</b>	69.9%	43.3%	0.0%	0.0%	47.5%	20.1%
<b>Supermarket</b>	67.3%	45.9%	0.0%	0.0%	61.0%	49.9%
<b>Farmer's market</b>	14.6%	5.5%	0.0%	0.0%	5.1%	0.0%
<b>Convenience store</b>	65.0%	43.3%	0.0%	0.0%	52.5%	49.9%
<b>Duty free store</b>	45.1%	24.3%	0.0%	0.0%	35.5%	10.1%
<b>Local shop/ artisan</b>	18.6%	24.4%	0.0%	0.0%	22.1%	20.1%

## STATEWIDE - ACTIVITIES – SHOPPING – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	97.7%	97.1%	97.4%	96.1%
<b>Mall/ department store</b>	77.8%	77.2%	76.7%	82.3%
<b>Designer boutique</b>	4.4%	4.6%	4.3%	5.9%
<b>Hotel/ resort store</b>	26.4%	30.2%	28.8%	24.9%
<b>Swap meet/ flea market</b>	6.2%	3.6%	2.9%	3.0%
<b>Discount/ outlet store</b>	72.4%	61.6%	62.1%	63.3%
<b>Supermarket</b>	52.5%	57.1%	57.5%	63.9%
<b>Farmer's market</b>	7.2%	10.3%	9.1%	12.2%
<b>Convenience store</b>	48.9%	43.3%	49.4%	61.0%
<b>Duty free store</b>	40.1%	45.8%	43.7%	41.6%
<b>Local shop/ artisan</b>	16.0%	14.7%	15.5%	19.7%



## ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	65.0%	56.7%	0.0%	0.0%	78.0%	40.1%
<b>Historic military site</b>	18.6%	5.4%	0.0%	0.0%	17.0%	0.0%
<b>Other historical site</b>	23.0%	29.8%	0.0%	0.0%	35.7%	20.1%
<b>Museum/ art gallery</b>	6.6%	2.7%	0.0%	0.0%	13.6%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	31.0%	13.5%	0.0%	0.0%	33.9%	9.9%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	7.5%	2.7%	0.0%	0.0%	6.8%	0.0%
<b>Play/ concert/ theatre</b>	4.4%	5.4%	0.0%	0.0%	5.1%	0.0%
<b>Art/ craft fair</b>	4.4%	2.7%	0.0%	0.0%	5.1%	10.1%
<b>Festival event</b>	1.8%	0.0%	0.0%	0.0%	1.7%	0.0%

# STATEWIDE - ACTIVITIES – HISTORY, CULTURE, FINE ARTS – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	60.9%	66.4%	64.6%	66.2%
<b>Historic military site</b>	18.0%	18.9%	15.5%	16.4%
<b>Other historical site</b>	28.6%	28.6%	28.9%	25.6%
<b>Museum/ art gallery</b>	8.4%	7.3%	7.1%	7.5%
<b>Luau/ Polynesian show/ hula show</b>	24.1%	21.9%	22.6%	29.8%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.9%	5.2%	5.4%	6.9%
<b>Play/ concert/ theatre</b>	3.0%	4.7%	4.9%	4.6%
<b>Art/ craft fair</b>	5.8%	5.9%	4.3%	4.6%
<b>Festival event</b>	1.1%	2.7%	1.5%	1.6%

## ACTIVITIES – TRANSPORTATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
<b>TOTAL</b>	97.8%	100.0%	0.0%	0.0%	98.3%	100.0%
<b>Airport shuttle</b>	16.4%	10.8%	0.0%	0.0%	10.2%	9.9%
<b>Trolley</b>	34.0%	5.4%	0.0%	0.0%	11.9%	0.0%
<b>Public bus</b>	16.8%	2.7%	0.0%	0.0%	8.5%	0.0%
<b>Tour bus/ tour van</b>	29.6%	19.0%	0.0%	0.0%	37.2%	40.1%
<b>Taxi/ limo</b>	27.0%	16.3%	0.0%	0.0%	20.3%	0.0%
<b>Rental car</b>	58.0%	78.3%	0.0%	0.0%	62.8%	59.9%
<b>Ride share</b>	20.4%	5.4%	0.0%	0.0%	11.9%	0.0%
<b>Bicycle rental</b>	2.2%	2.7%	0.0%	0.0%	1.7%	0.0%

# STATEWIDE - ACTIVITIES – TRANSPORTATION – KOREA

	2017	2018	2019	2020
<b>TOTAL</b>	98.8%	95.5%	95.0%	98.0%
<b>Airport shuttle</b>	18.8%	15.9%	16.2%	15.1%
<b>Trolley</b>	30.2%	21.8%	23.4%	27.2%
<b>Public bus</b>	15.5%	12.2%	11.3%	14.1%
<b>Tour bus/ tour van</b>	35.0%	30.7%	33.4%	30.5%
<b>Taxi/ limo</b>	21.5%	20.7%	21.3%	24.9%
<b>Rental car</b>	61.1%	62.0%	54.6%	61.3%
<b>Ride share</b>	NA	7.4%	12.0%	17.7%
<b>Bicycle rental</b>	NA	1.3%	1.3%	1.6%

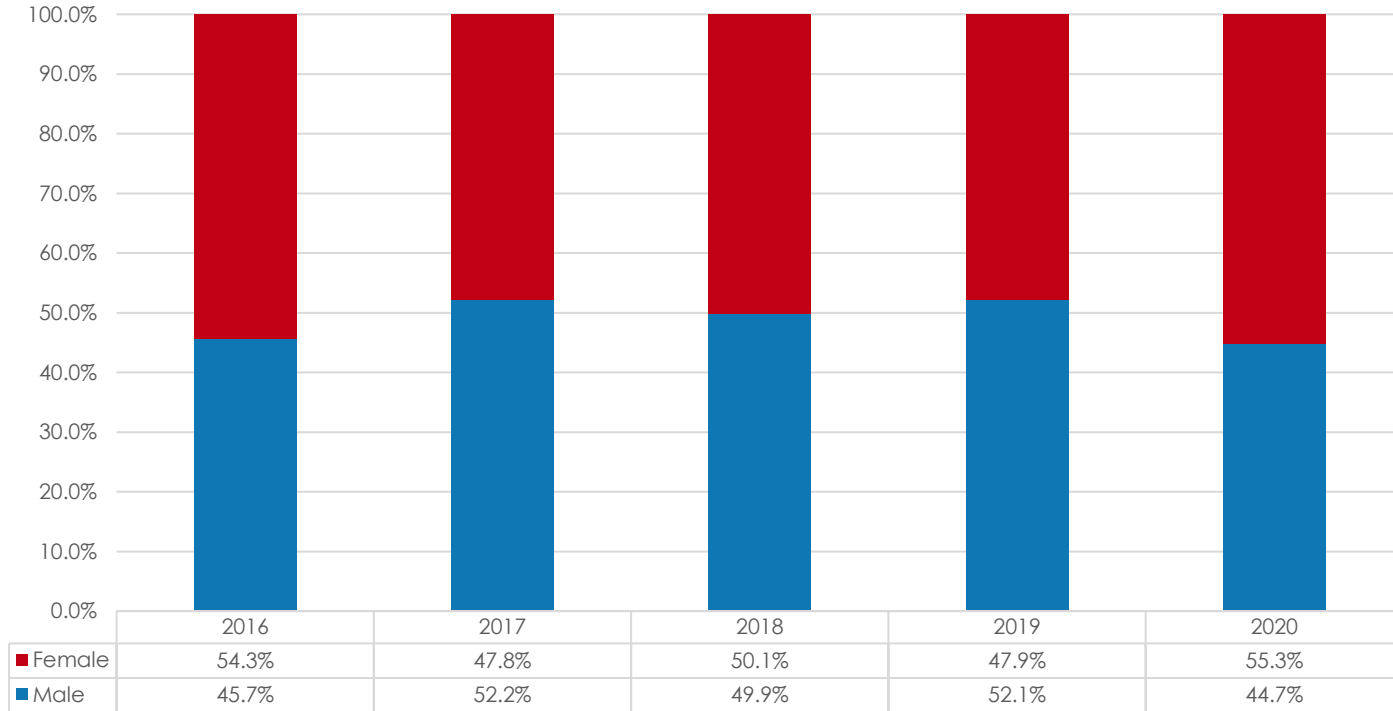
## ACTIVITIES – OTHER – KOREA

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
<b>TOTAL</b>	20.4%	8.2%	0.0%	0.0%	20.4%	20.1%
<b>Visit friends/ family</b>	20.4%	8.2%	0.0%	0.0%	20.4%	20.1%
<b>Volunteer non profit</b>	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%

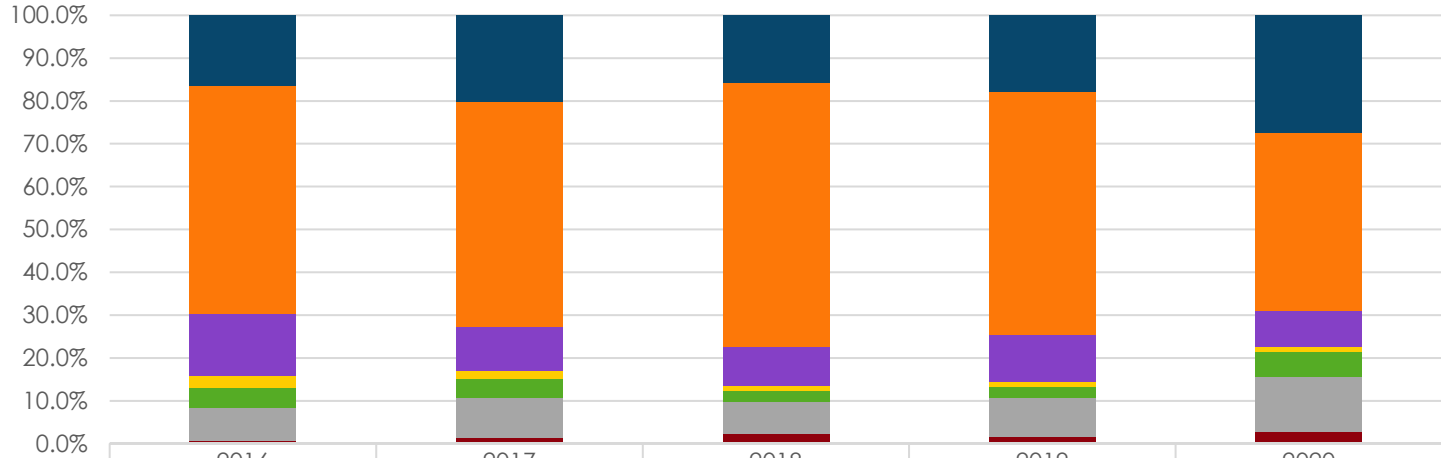
## ACTIVITIES – OTHER – KOREA

	2018	2019	2020
<b>TOTAL</b>	16.2%	18.7%	19.4%
<b>Visit friends/ family</b>	14.6%	17.7%	19.4%
<b>Volunteer non profit</b>	1.8%	1.0%	0.3%

# VISITOR PROFILE – GENDER – KOREA



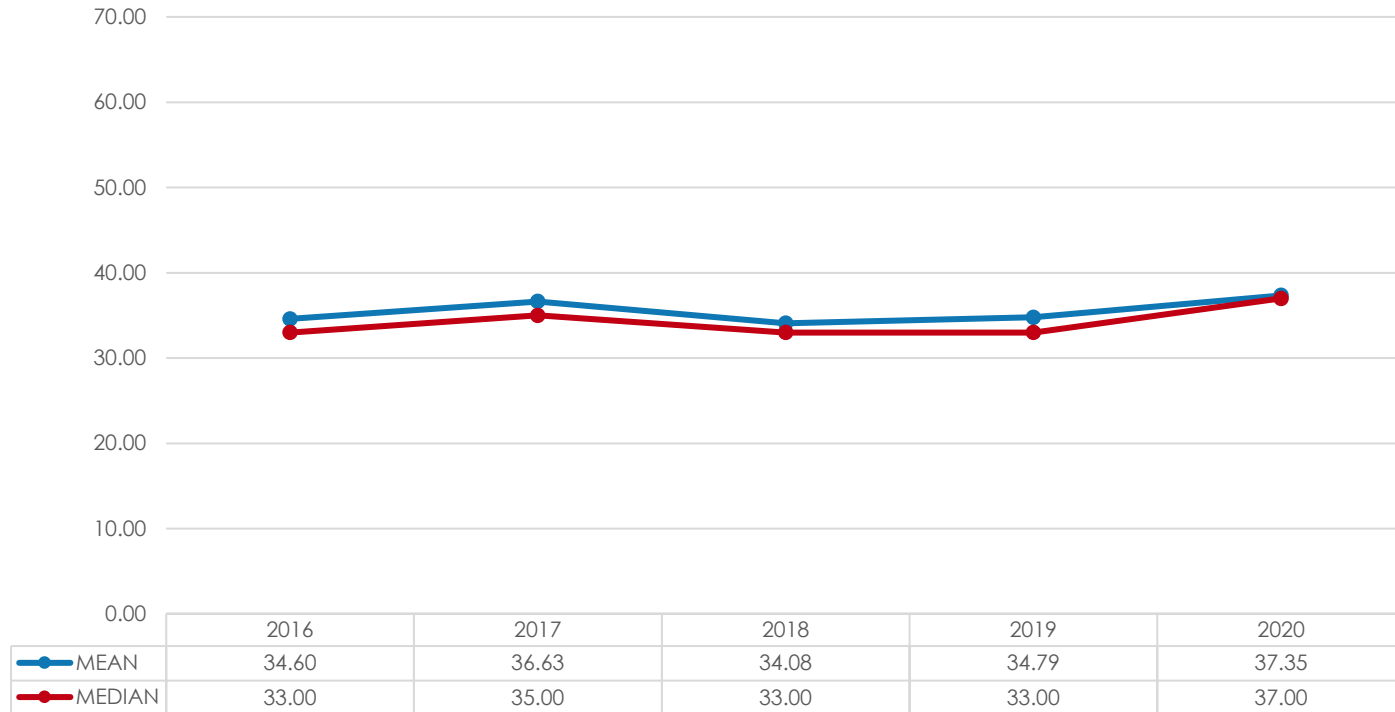
# VISITOR PROFILE – EDUCATION – KOREA



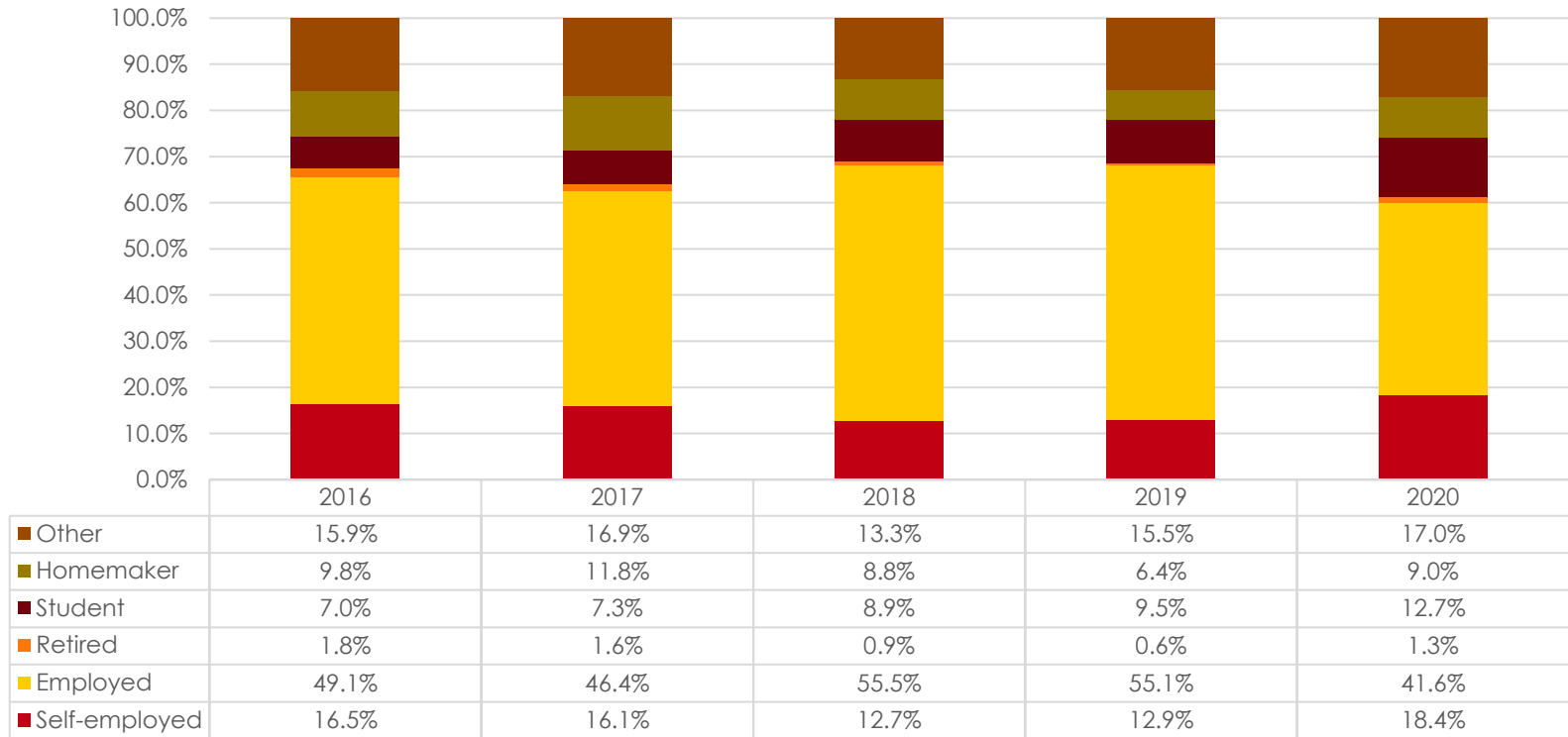
	2016	2017	2018	2019	2020
Post-Graduate	16.5%	20.1%	15.8%	17.8%	27.4%
College Grad	53.2%	52.6%	61.5%	56.8%	41.6%
Associate Degree	14.4%	10.2%	9.2%	11.0%	8.3%
Vocational/ Tech	2.8%	2.0%	1.1%	1.0%	1.3%
Some College	4.7%	4.3%	2.6%	2.7%	5.7%
H.S. Grad	7.7%	9.6%	7.6%	9.2%	13.0%
Some / No H.S.	0.7%	1.2%	2.2%	1.5%	2.7%



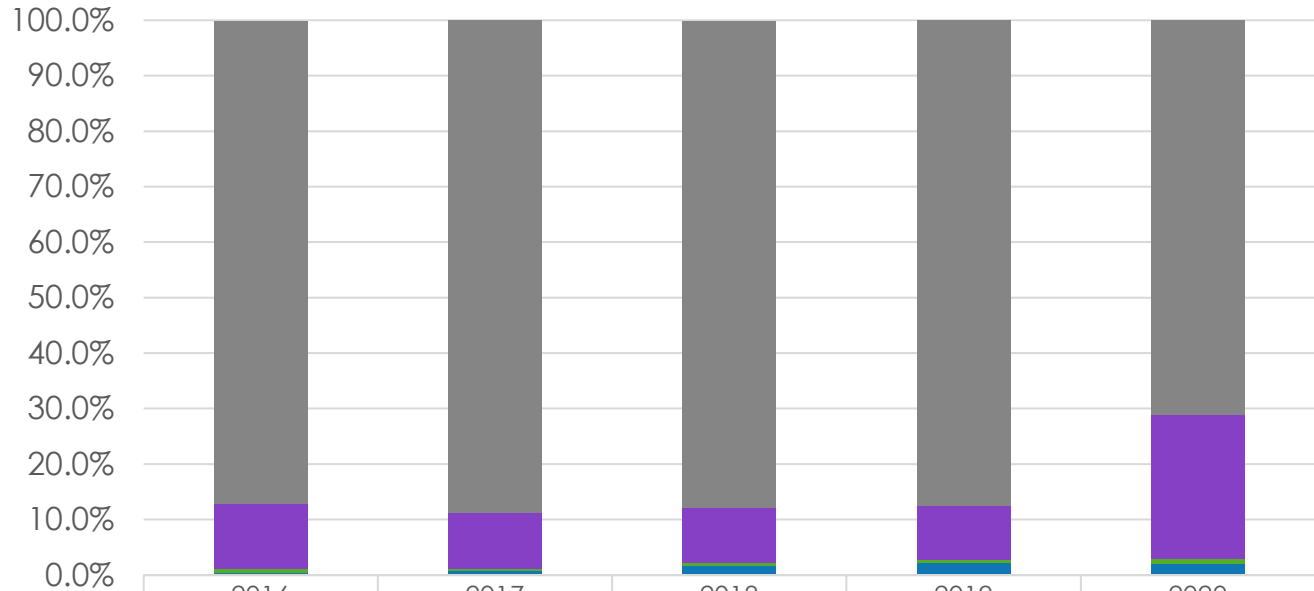
# VISITOR PROFILE – AGE – KOREA



# VISITOR PROFILE – EMPLOYMENT STATUS – KOREA



# VISITOR PROFILE – HAWAII PROPERTY OWNER – KOREA



■ Do not nor plan to purchase	87.0%	88.8%	87.7%	87.6%	71.2%
■ Plan to in future	11.9%	10.1%	9.9%	9.8%	25.8%
■ Other Property Type	0.6%	0.3%	0.7%	0.4%	1.0%
■ Timeshare	0.4%	0.8%	1.6%	2.3%	2.0%

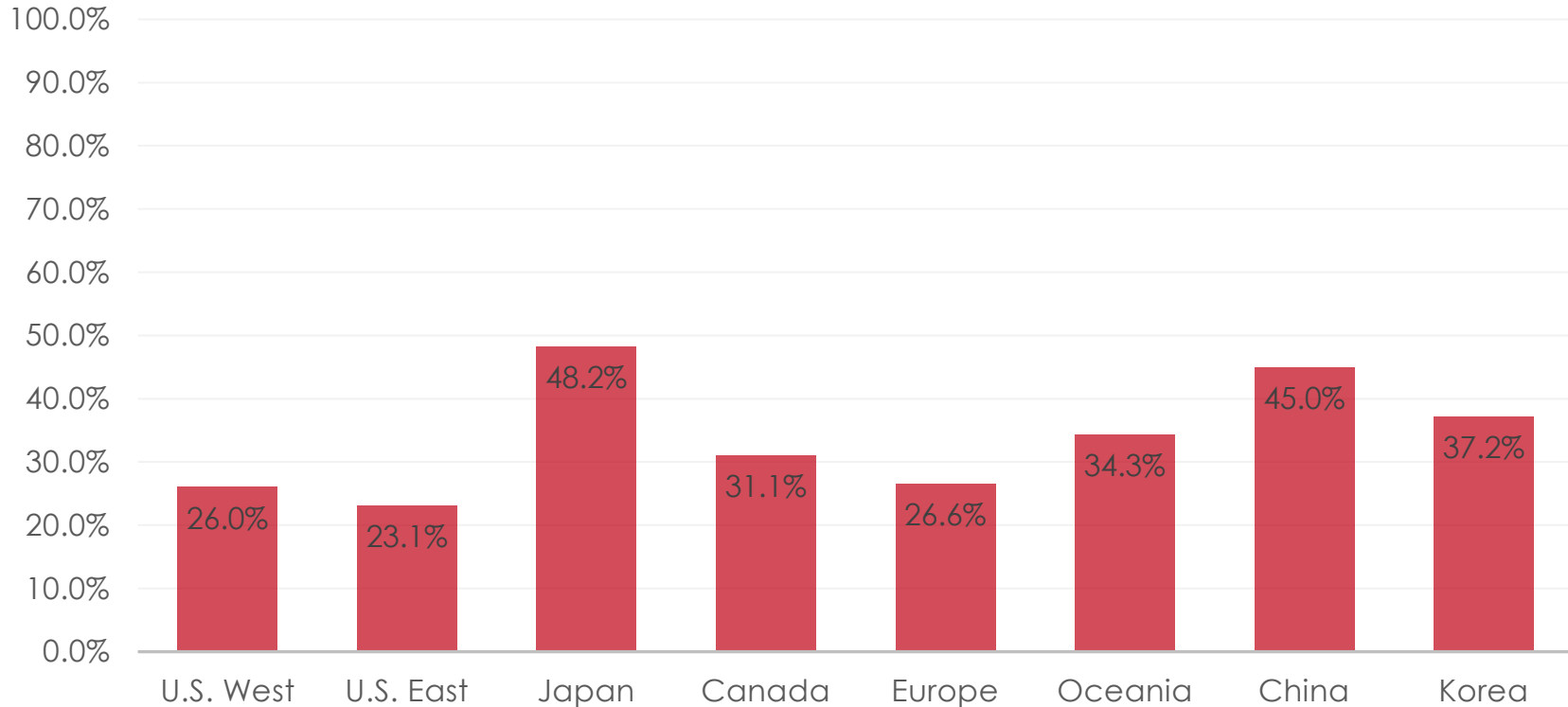
# VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	2018	2019	2020
< ₩16,305,000	16.0%	13.0%	10.2%
₩16,305,000 21,171,999	9.3%	9.6%	7.3%
₩27,174,000 38,041,999	16.6%	13.7%	8.4%
₩38,044,000 48,911,999	10.2%	10.9%	11.7%
₩48,912,000 59,781,999	10.4%	9.3%	10.9%
₩59,782,000 70,652,999	11.9%	10.8%	12.8%
₩70,653,000 81,520,999	7.1%	7.5%	6.9%
₩81,521,000 92,390,999	3.5%	5.3%	6.9%
₩92,391,000 103,259,999	4.3%	4.5%	6.2%
₩103,260,000+	10.9%	15.4%	18.7%

Note: All eight visitor markets are included in data for Q1 2020; only data from the U.S. West and U.S. East are available for all four quarters of 2020, due to impacts of the COVID-19 pandemic. Therefore, some results are presented with relatively 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 – O‘AHU

# ADVERTISING AWARENESS – O‘AHU

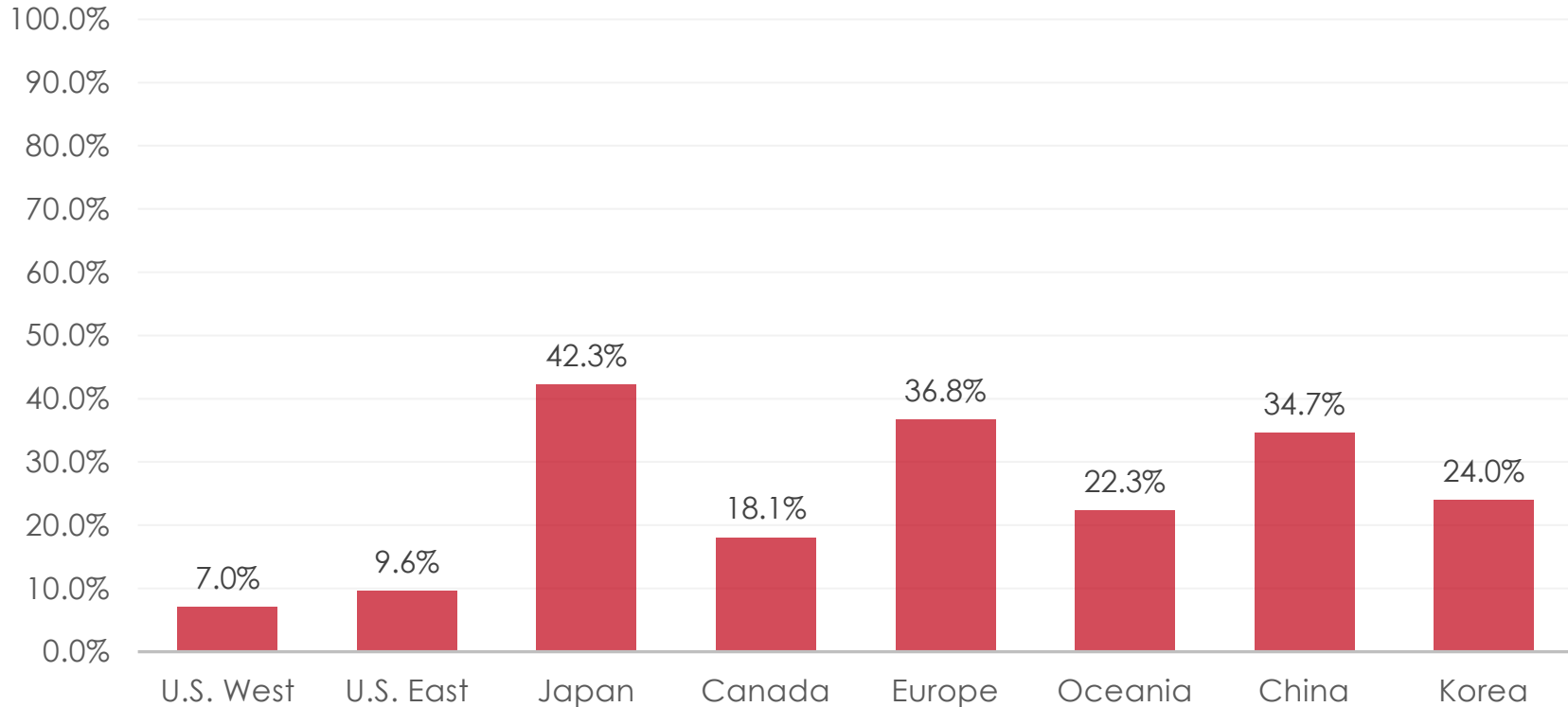


398 Q. Do you remember seeing or hearing advertising for the island of O'ahu prior to your arrival?

# ADVERTISING AWARENESS – O‘AHU

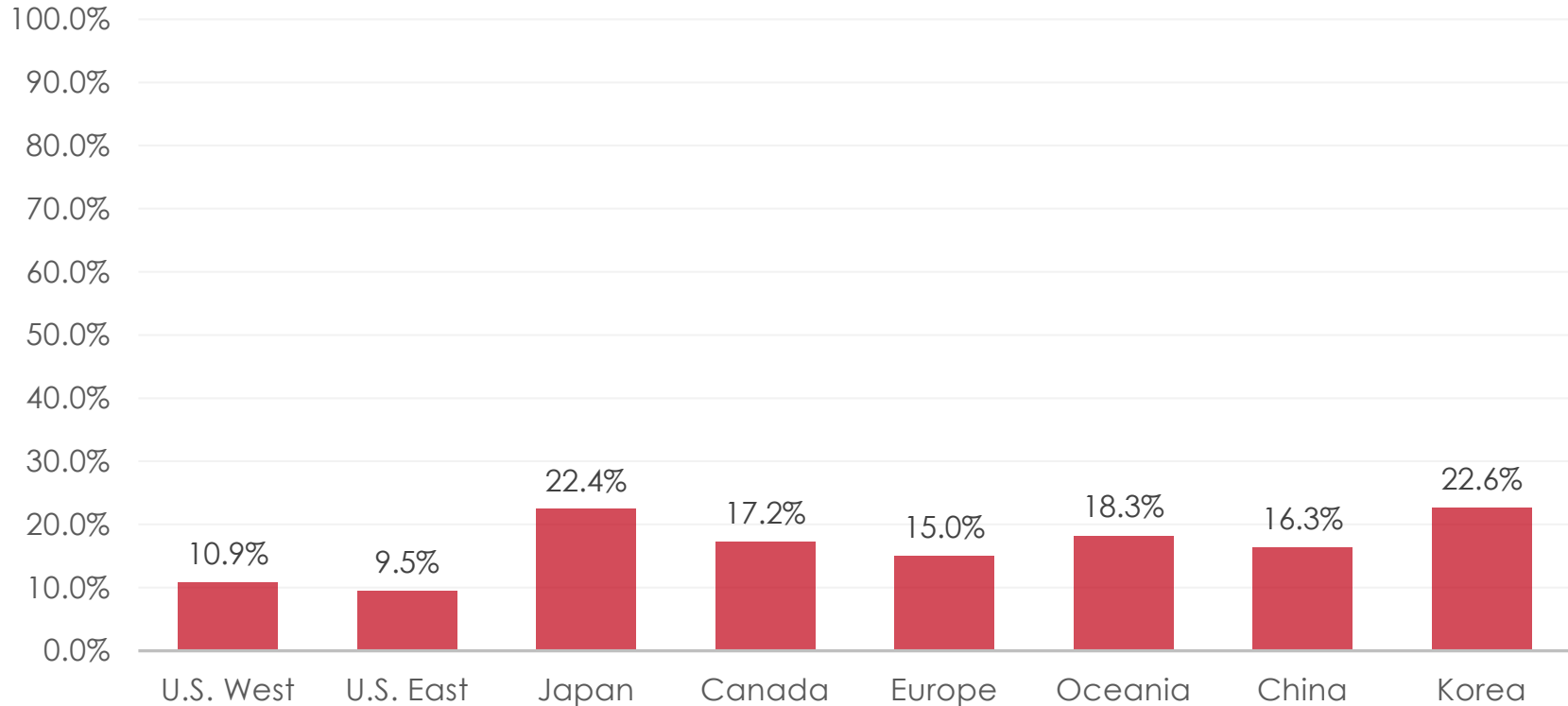
- Female visitors from Korea were more likely to be exposed to marketing for O‘ahu than male visitors from this visitor market.
- Repeat visitors from U.S. West, Japan, Oceania, and Korea were more likely to be exposed to marketing for O‘ahu than first-time visitors from these markets.
- Younger segments, particularly visitors under the age of 35 were least likely to have been exposed to marketing for O‘ahu prior to their trip in the following markets: U.S. West, U.S. East and Japan.
- Those whose trips included visits to multiple islands in addition to O‘ahu were more likely to be exposed to marketing for the island from U.S. West, U.S. East, and Japan.

# IMPACT OF LOCATION FILMING – O‘AHU

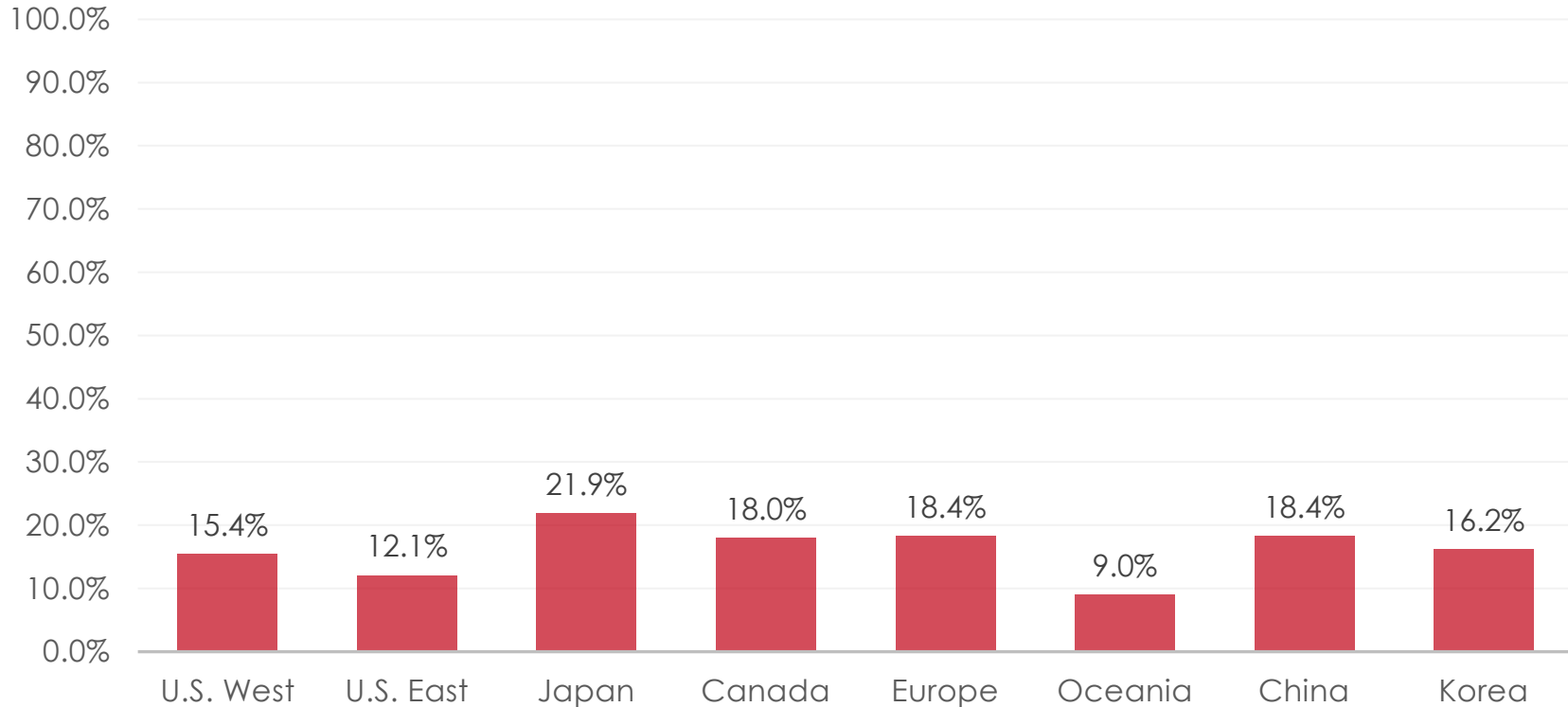




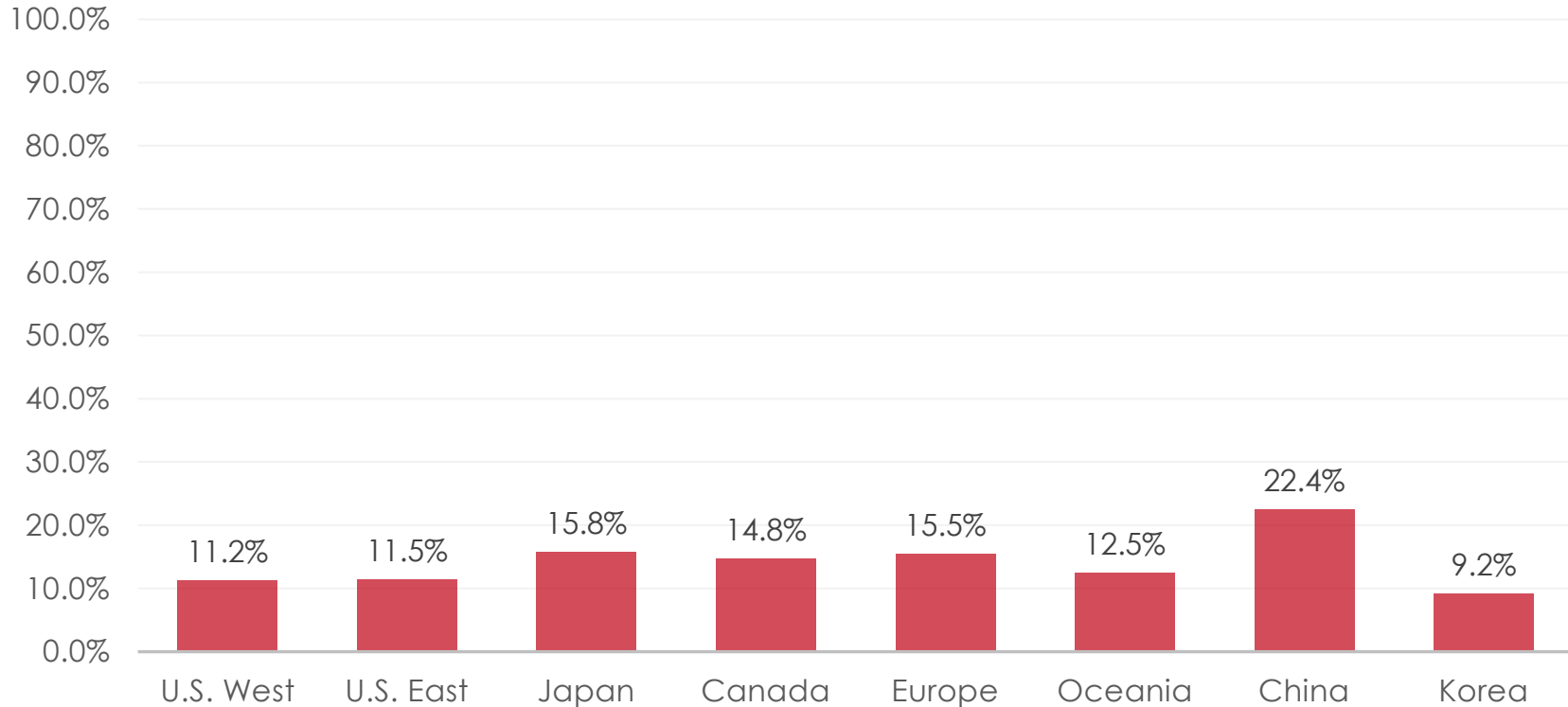
# IMPACT OF SOCIAL MEDIA POSTS – O‘AHU



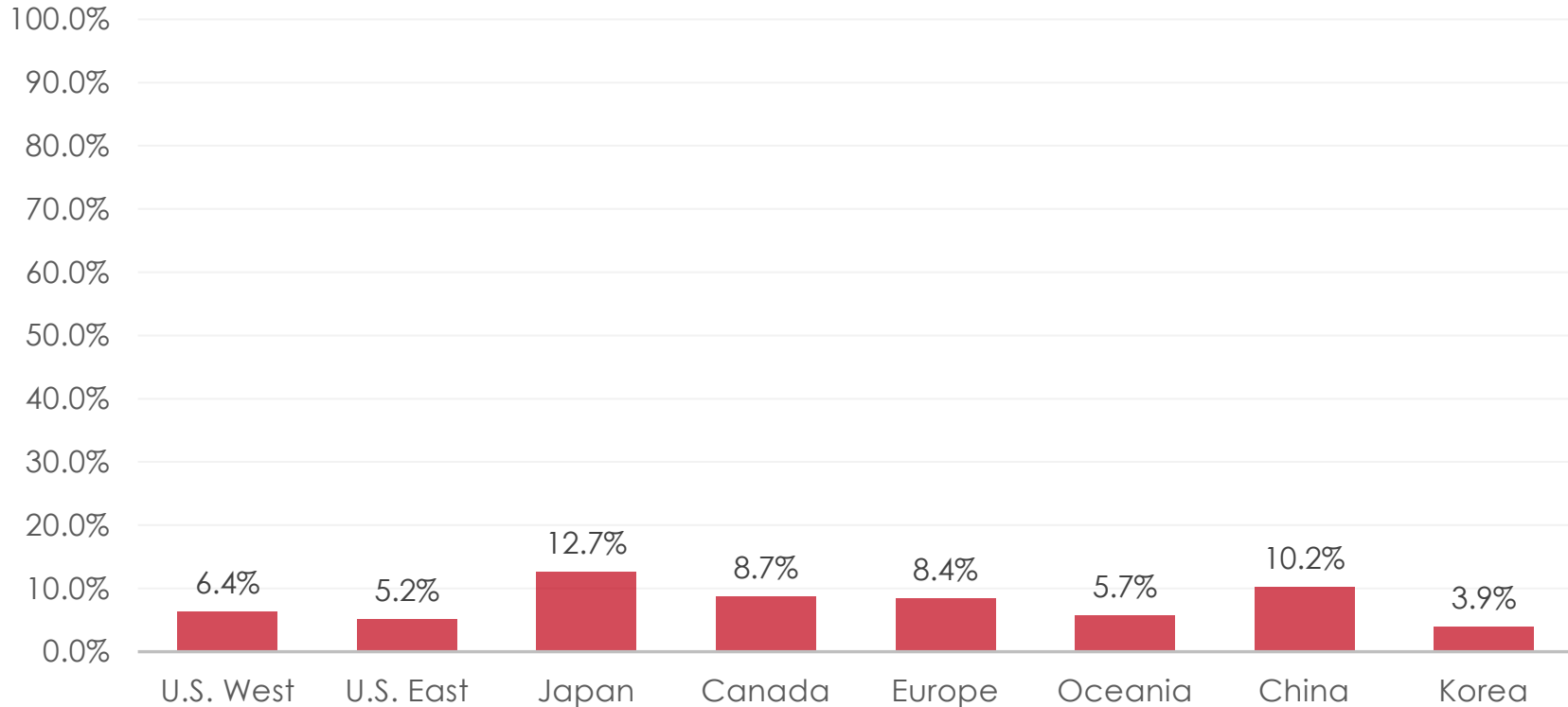
# IMPACT OF OUTDOOR/ SPORTING EVENTS – O‘AHU



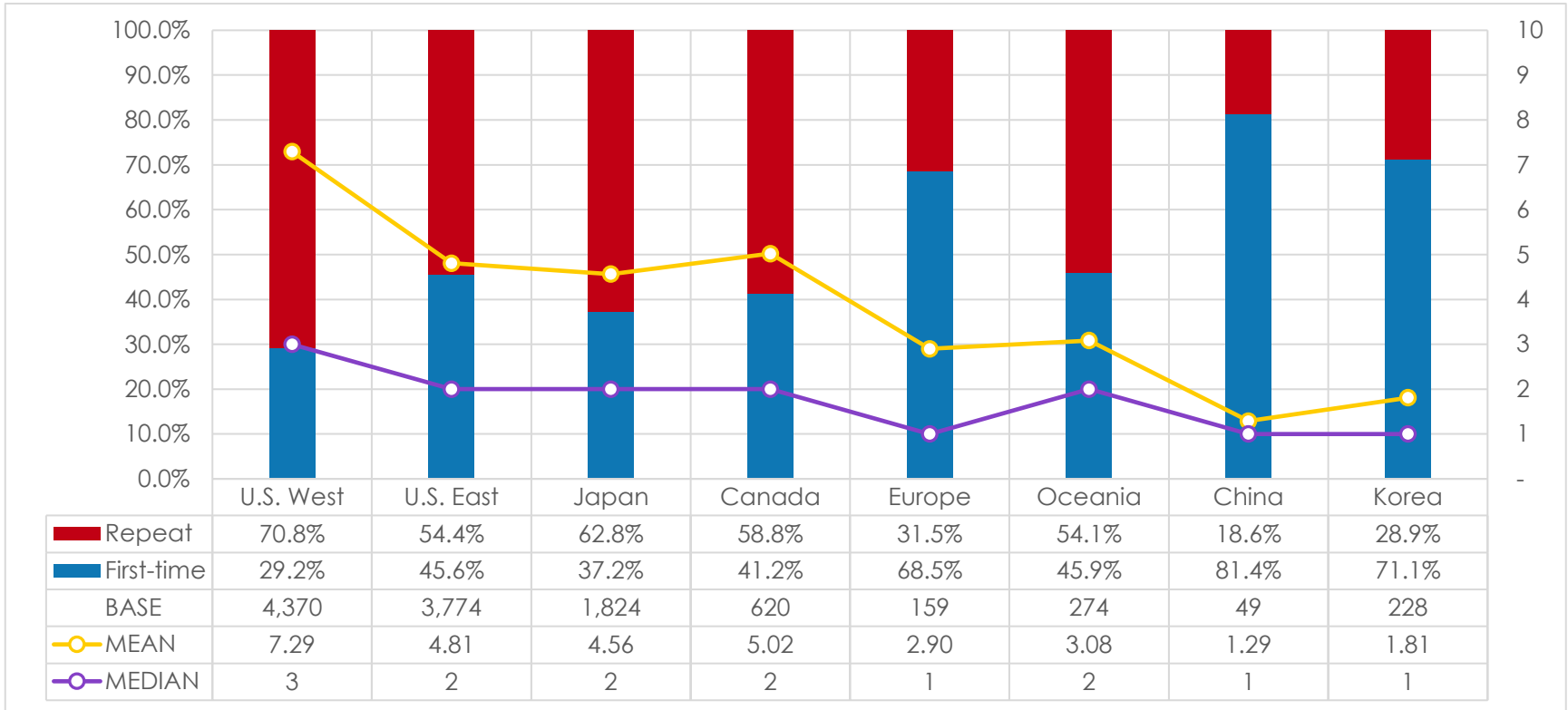
# IMPACT OF HAWAIIAN CULTURAL EVENTS – O‘AHU



# IMPACT OF HAWAIIAN MUSIC – O‘AHU



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - O'AHU



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - O'AHU

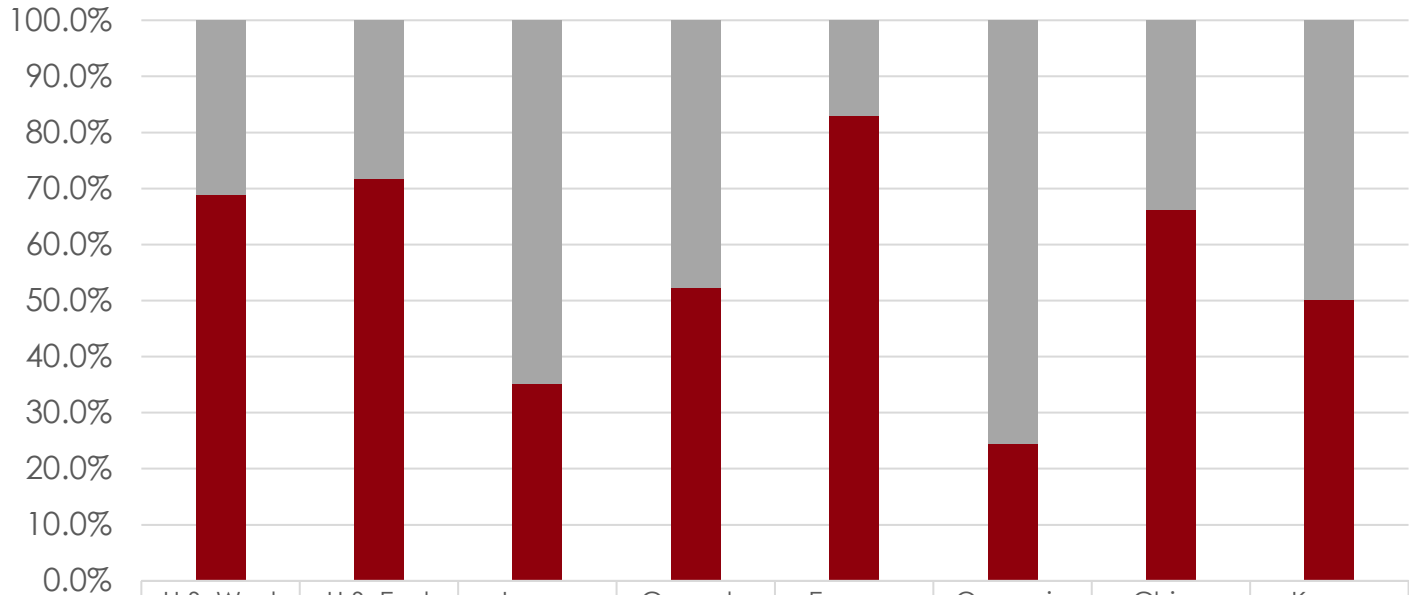
- Male travelers from U.S. West have traveled to O'ahu more often than females from this visitor market.
- When segmented by education we find that college graduates from U.S. West travel to O'ahu more often than those without a college degree from this market. Conversely, less educated segments from Canada were more frequent travelers to O'ahu.
- Those in larger travel parties were less frequent visitors to O'ahu from the following markets: U.S. West, U.S. East, and Japan.
- Canadian visitors whose trip consisted of visiting just O'ahu were more frequent visitors to the island. It was different among Japanese traveler, where those who visited multiple islands in addition to O'ahu, were more frequent visitors to O'ahu.

# ACCOMMODATIONS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hotel/ resort/ villa	47.0%	49.0%	81.9%	52.6%	72.2%	79.5%	75.5%	81.5%
Stayed with friends or relatives	27.5%	30.2%	2.6%	5.5%	10.4%	0.7%	0.0%	3.5%
Vacation rental (includes Airbnb, VRBO, etc.)	13.5%	11.5%	1.9%	23.6%	6.3%	11.5%	2.0%	8.3%
Condominium	10.4%	7.6%	9.6%	15.7%	5.5%	9.6%	10.2%	6.2%
Timeshare Unit	7.8%	5.4%	4.5%	9.2%	2.5%	1.7%	0.0%	0.9%
Private Room in Private Home	6.0%	6.2%	0.5%	1.7%	4.5%	0.3%	0.0%	0.0%
Rental House	3.0%	2.3%	0.2%	2.1%	2.7%	1.0%	4.1%	2.2%
Military housing/ accommodations	2.1%	4.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Hostel	1.2%	1.3%	1.2%	3.0%	2.9%	1.6%	6.1%	1.8%
Day trip/ Did not stay overnight	1.0%	1.2%	1.8%	0.7%	0.7%	1.6%	0.0%	0.4%
Shared Room/ Space in Private Home	1.4%	1.4%	0.1%	1.0%	0.0%	0.3%	0.0%	0.0%
Own property/ 2nd home	1.6%	0.7%	0.3%	0.5%	0.0%	0.0%	0.0%	0.9%

# ACCOMMODATIONS - O'AHU

Vacation rental/ Rental house/ Private room/ Shared room



■ Visitor area	31.1%	28.3%	64.8%	47.8%	16.9%	75.5%	33.7%	49.9%
■ Residential Neighborhood	68.9%	71.7%	35.2%	52.2%	83.1%	24.5%	66.3%	50.1%
BASE	983	759	45	158	19	33	3	24



# ACCOMMODATIONS - O'AHU

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	31.3%	26.1%	30.3%	41.0%	25.8%	58.7%	66.9%	4.2%
Owned by self, friend or relative	25.3%	31.4%	12.0%	2.4%	4.4%	0.0%	0.0%	0.0%
Price/ value/ best deal	21.8%	19.5%	28.8%	28.5%	30.3%	29.4%	0.0%	45.8%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	8.9%	8.3%	19.2%	12.2%	16.9%	5.6%	0.0%	20.8%
Ability to have travel party members stay together	4.4%	4.2%	7.2%	7.7%	5.6%	6.3%	0.0%	12.4%
Recommended friends/ family	3.3%	4.2%	2.4%	5.1%	5.6%	0.0%	33.1%	0.0%
Availability	3.1%	3.9%	0.0%	2.5%	11.3%	0.0%	0.0%	12.6%
No choice/ part of package	0.8%	1.4%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Beach/ ocean	23.3%	18.0%	20.3%	19.3%	16.4%	11.2%	18.3%	20.6%
Variety of activities/ attractions/ many choices	10.5%	14.2%	16.6%	20.2%	21.5%	20.3%	24.5%	29.3%
Nature/ natural beauty/ scenery	13.0%	17.9%	12.0%	14.3%	16.0%	10.0%	14.3%	16.7%
Events/ celebrations with friends/ family	10.9%	11.3%	3.6%	2.7%	2.6%	1.7%	0.0%	3.1%
Feeling of the Aloha Spirit	9.4%	8.2%	2.4%	9.3%	10.0%	11.4%	8.1%	2.6%
Overall customer service/ hospitality/ the people	6.5%	5.1%	3.7%	8.9%	8.1%	8.4%	2.0%	6.6%
Food/ restaurant variety/ dining options	6.3%	4.5%	5.5%	5.6%	5.6%	5.8%	12.3%	2.6%
Shopping	0.5%	0.3%	19.5%	0.8%	1.2%	4.9%	4.1%	7.0%
Local culture/ people/ music	4.9%	4.4%	3.3%	4.6%	2.6%	4.6%	0.0%	3.5%
Accommodations/ was as promised	2.2%	1.9%	3.5%	2.8%	1.2%	2.5%	0.0%	1.3%
Military historical sites	1.7%	3.2%	0.6%	2.1%	7.3%	3.5%	4.1%	0.0%
Feeling safe/ secure	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

## STRENGTHS/ POSITIVE ASPECTS - O'AHU

- Female visitors from U.S. East and Korea were more likely to mention beaches/ ocean compared to males. Males from U.S. West and Japan were more likely than females to compliment Oahu on the variety of activities and attractions than were females from these visitor markets. Males from U.S. West, U.S. East, and Korea were also more likely to appreciate food and restaurant options than were females.
- Younger travelers or those under 35 from both U.S. West and U.S. East were more likely to compliment O'ahu on its natural beauty. Older travelers from U.S. West and U.S. East were more likely to be pleased that they were able to celebrate with family members during their stay on the island. Japanese travelers under the age of 50 mention Oahu's beaches and ocean when asked about positive aspects of their trip.
- First-time visitors from both U.S. West, U.S. East, and Canada were more likely to highlight the many activities and attractions as well as O'ahu's natural beauty compared to repeat visitors from these regions. Repeat visitors from U.S. West, when asked about positive aspects of their stay on island mentioned the beach and ocean with more frequency than first-time visitors.

# AREAS OF OPPORTUNITIES - O'AHU

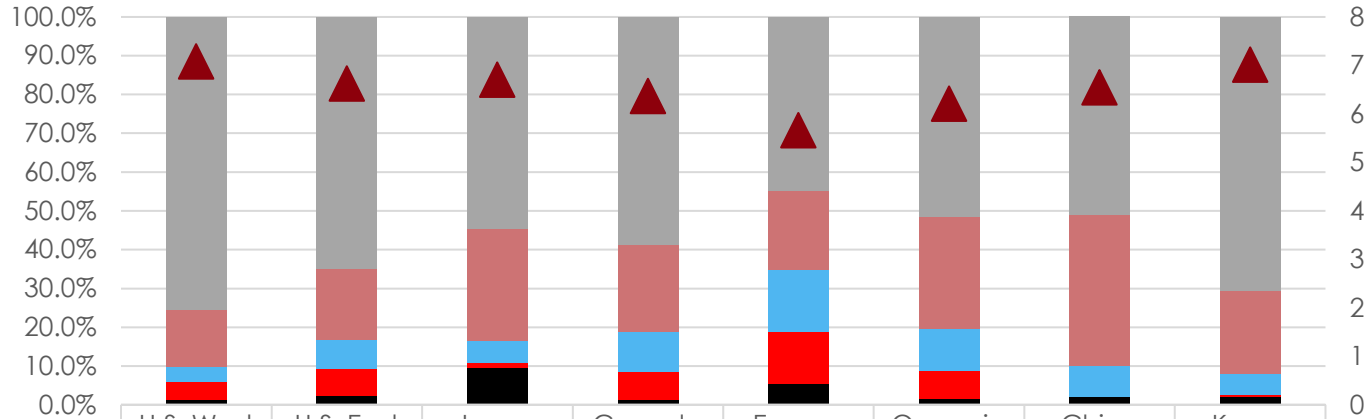
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	36.8%	36.5%	42.1%	40.7%	44.8%	36.8%	36.7%	30.2%
COVID 19	12.1%	11.0%	0.5%	2.5%	0.5%	3.3%	0.0%	0.0%
Traffic (congested/slow)	8.3%	9.9%	4.7%	12.1%	8.0%	6.2%	4.1%	5.3%
Would like to experience more local culture	7.4%	8.2%	4.2%	6.3%	9.9%	6.5%	10.2%	10.1%
Concerns about safety	4.4%	4.1%	9.4%	4.0%	5.6%	3.3%	8.2%	7.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	5.8%	5.5%	5.4%	3.9%	3.7%	2.8%	2.1%	3.1%
Food/ restaurant variety/ dining options	5.5%	4.5%	2.6%	3.6%	4.4%	4.0%	8.2%	7.5%
Variety of activities/ attractions	4.6%	3.8%	1.9%	0.9%	2.1%	2.8%	0.0%	2.6%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	1.2%	1.3%	5.9%	1.0%	2.1%	3.1%	8.1%	3.5%
Homelessness	2.2%	3.0%	0.3%	4.4%	3.5%	5.2%	2.1%	1.3%
Accommodations/ cleanliness/ upkeep	1.4%	1.5%	3.4%	2.4%	1.8%	2.2%	4.1%	4.0%
Food/ restaurant quality	1.0%	0.9%	4.8%	1.2%	1.2%	2.2%	2.0%	5.3%

# AREAS OF OPPORTUNITIES - O'AHU

- Traffic was the primary concern for males from U.S. West, U.S. East, and Japan, more than it was for females from these markets.
- Male visitors from U.S. East were more likely to mention the pandemic when asked about facets of their trip that could be improved upon.
- Female respondents from U.S. West, U.S. East, China, and Japan were more likely to agree that there was nothing in particular they could think of to improve their stay on Oahu.
- Males from Japan were more likely to complain about the driving experience on island than were females from this market.
- Males from Japan and females from Oceania and Korea feel their trip would have been better if they were exposed to more of the local culture.

# LIKELIHOOD OF RETURN VISIT – O‘AHU

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	75.4%	64.7%	54.6%	58.8%	44.7%	51.6%	51.1%	70.5%
■ Somewhat likely (5-6)	14.8%	18.6%	28.9%	22.4%	20.5%	28.7%	38.7%	21.6%
■ Somewhat unlikely (3-4)	3.8%	7.3%	5.7%	10.6%	15.9%	10.9%	8.1%	5.3%
■ Very unlikely (1-2)	4.5%	6.9%	1.2%	7.1%	13.5%	7.3%	0.0%	0.4%
■ Not sure	1.5%	2.4%	9.6%	1.3%	5.4%	1.6%	2.0%	2.2%
BASE	4368	3768	1822	615	158	273	49	227
▲ MEAN	7.08	6.63	6.70	6.37	5.66	6.21	6.54	7.01

# LIKELIHOOD OF RETURN VISIT – O‘AHU

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among visitors from U.S. East, less affluent travelers express a greater likelihood of returning to O‘ahu than more affluent visitors from this market.
- When segmented by age we find younger travelers from Japan under the age of 35 the least likely to return to O‘ahu in the next five years. The results are a bit different for visitors from U.S. East, where those under 50 appear the most likely to return to O‘ahu in the next five years.
- Less educated travelers or those without a college degree from U.S. East, Japan, and Korea express a greater likelihood of returning to O‘ahu in the next five years. The opposite is true among visitors from China where college graduates were more likely to return to O‘ahu.
- Female visitors from both U.S. West and U.S. East gave higher mean scores compared to male visitors from these markets indicating a greater likelihood of returning to O‘ahu.
- Those whose trip consisted of visiting multiple islands in addition to O‘ahu appear less likely to return in the next five years from the following visitor markets: U.S. West, U.S. East, and Canada.

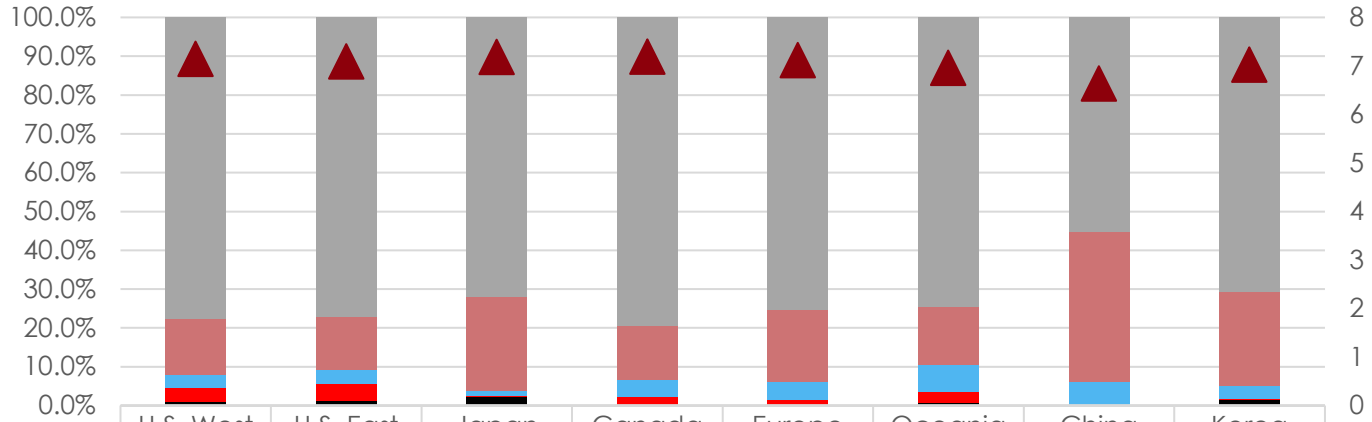
# REASONS FOR NOT RETURNING - O'AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	29.9%	28.9%	25.9%	47.8%	26.6%	41.5%	20.0%	33.5%
Too expensive/cost	20.8%	27.3%	30.0%	36.3%	33.0%	46.1%	20.0%	72.2%
Too commercial/overdeveloped	18.8%	15.7%	3.5%	31.2%	13.9%	23.5%	0.0%	0.0%
Flight too long	4.3%	15.1%	18.8%	16.8%	46.0%	10.2%	60.0%	44.4%
Too crowded/ congested/ traffic	16.5%	16.4%	0.8%	29.9%	15.5%	8.5%	0.0%	5.5%
Other financial obligations	4.1%	8.4%	30.8%	5.6%	13.9%	5.6%	0.0%	16.6%
Not enough value for the price	12.4%	12.4%	2.7%	17.3%	15.5%	25.2%	0.0%	27.6%
No reason to return/ nothing new	12.7%	11.0%	9.2%	6.4%	9.1%	11.5%	20.0%	5.5%
Unfriendly people/ felt unwelcome	12.6%	12.4%	1.9%	4.1%	2.0%	6.4%	0.0%	0.0%
COVID 19	13.8%	13.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor service	5.0%	4.4%	0.3%	2.6%	4.0%	0.0%	0.0%	5.5%



# O'AHU - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	77.7%	77.0%	71.9%	79.5%	75.2%	74.5%	55.2%	70.8%
■ Somewhat likely (5-6)	14.4%	13.8%	24.3%	14.0%	18.5%	15.1%	38.7%	23.9%
■ Somewhat unlikely (3-4)	3.2%	3.6%	1.4%	4.3%	4.8%	6.9%	6.1%	3.5%
■ Very unlikely (1-2)	3.7%	4.5%	0.3%	2.3%	1.4%	2.7%	0.0%	0.4%
■ Not sure	1.0%	1.2%	2.2%	0.0%	0.0%	0.8%	0.0%	1.3%
BASE	4367	3765	1818	613	158	272	49	226
▲ MEAN	7.14	7.09	7.18	7.19	7.12	6.96	6.63	7.02

# O'AHU - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Less affluent visitors from both U.S. West and U.S. East were stronger advocates for O'ahu than more affluent visitors from this market.
- Visitors from U.S. West under the age of 50 were stronger brand advocates for O'ahu than those older than 50. Among visitors from U.S. East, younger travelers under the age of 35 were the most likely to recommend O'ahu to others.
- Less educated visitors or those without a college degree from U.S. East and Japan were stronger advocates for visiting O'ahu than more educated travelers from these markets. Conversely, Chinese visitors with a college degree were stronger advocates than less educated visitors from this market.
- Female visitors from U.S. West, U.S. East, and Japan were stronger advocates for O'ahu than males from these markets.
- Visitors from U.S. West, U.S. East, and Canada whose trip consisted of visiting just O'ahu were stronger advocates for returning to the island compared to those who visited multiple islands during their stay.

# O'AHU ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.3%	90.6%	93.8%	93.1%	92.5%	89.5%	91.8%	96.5%
<b>On own (self guided)</b>	77.2%	77.4%	64.0%	72.6%	52.7%	52.0%	49.0%	76.1%
<b>Helicopter/ airplane</b>	1.3%	1.7%	0.8%	1.9%	1.8%	0.0%	4.1%	1.8%
<b>Boat/ submarine/ whale</b>	11.3%	14.4%	13.1%	13.6%	25.6%	15.3%	28.5%	18.6%
<b>Visit towns</b>	34.7%	38.7%	28.2%	43.1%	42.3%	25.5%	18.3%	36.3%
<b>Limo/ van/ bus tour</b>	3.9%	7.0%	18.0%	13.7%	26.6%	29.3%	18.3%	18.6%
<b>Scenic views/ natural landmark</b>	44.9%	54.0%	15.1%	56.5%	53.3%	45.2%	71.4%	59.7%
<b>Movie/ TV/ film location</b>	6.6%	7.9%	5.1%	7.2%	11.3%	10.7%	24.5%	23.4%

# O'AHU ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.9%	89.3%	93.8%	97.0%	94.0%	93.5%	93.9%	99.1%
<b>Beach/ sunbathing</b>	76.5%	77.9%	70.4%	87.4%	77.9%	76.4%	73.4%	84.5%
<b>Bodyboard</b>	11.4%	7.7%	1.3%	8.0%	5.2%	3.8%	2.0%	1.3%
<b>Standup paddle board</b>	7.8%	6.7%	1.5%	4.4%	8.1%	6.7%	2.0%	6.6%
<b>Surfing</b>	13.1%	9.2%	3.4%	10.1%	8.7%	7.9%	6.1%	8.9%
<b>Canoeing/ kayak</b>	5.8%	6.8%	1.7%	2.8%	2.5%	2.2%	0.0%	3.5%
<b>Swim ocean</b>	59.3%	57.2%	30.5%	67.1%	56.7%	61.8%	26.5%	50.9%
<b>Snorkel</b>	32.8%	27.7%	13.3%	35.6%	25.9%	22.3%	12.3%	47.7%
<b>Freediving</b>	1.5%	1.3%	0.6%	1.0%	0.0%	0.0%	8.1%	1.8%
<b>Windsurf/ Kitesurf</b>	0.2%	0.3%	0.2%	0.2%	0.0%	0.4%	0.0%	0.4%
<b>Jet ski/ Parasail</b>	1.5%	1.8%	3.4%	1.1%	0.0%	1.9%	2.1%	6.6%
<b>Scuba</b>	2.5%	2.7%	2.1%	2.7%	2.3%	0.0%	2.0%	2.7%
<b>Fishing</b>	2.6%	2.9%	0.3%	1.9%	1.2%	2.3%	2.0%	1.8%
<b>Golf</b>	4.5%	4.0%	4.9%	4.0%	1.6%	1.5%	4.1%	6.7%

# O'AHU ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	88.9%	89.3%	93.8%	97.0%	94.0%	93.5%	93.9%	99.1%
<b>Run/ Jog/ Fitness walk</b>	33.2%	33.3%	16.9%	34.5%	27.0%	26.1%	20.4%	12.0%
<b>Spa</b>	4.1%	5.0%	6.9%	5.2%	5.1%	6.2%	2.0%	4.0%
<b>Hiking</b>	39.0%	44.5%	19.3%	42.4%	34.1%	19.2%	36.7%	23.9%
<b>Backpack/Camp</b>	1.2%	2.0%	0.3%	0.7%	0.5%	0.0%	4.1%	0.9%
<b>Agritourism</b>	7.0%	10.0%	7.8%	9.0%	7.9%	8.8%	24.4%	27.4%
<b>Sport event/ tournament</b>	1.0%	0.9%	1.3%	3.9%	1.6%	2.3%	0.0%	1.8%
<b>Park/ botanical garden</b>	24.7%	30.2%	15.2%	37.3%	30.4%	24.0%	38.8%	25.7%
<b>Waterpark</b>	1.3%	1.5%	1.8%	1.8%	1.2%	1.1%	10.2%	3.5%
<b>Mountain tube/ waterfall rappel</b>	0.3%	0.7%	0.2%	0.3%	0.0%	0.0%	0.0%	0.9%
<b>Zip lining</b>	2.7%	2.5%	1.1%	1.3%	1.2%	1.4%	0.0%	2.2%
<b>Skydiving</b>	0.7%	0.6%	1.3%	0.4%	0.7%	0.0%	4.1%	2.2%
<b>All terrain vehicle (ATV)</b>	3.8%	4.6%	1.4%	3.1%	4.1%	4.4%	12.2%	11.9%
<b>Horseback riding</b>	1.6%	1.8%	2.8%	1.5%	1.2%	0.8%	4.1%	1.8%

# O'AHU ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.7%	96.6%	96.9%	99.5%	98.1%	98.2%	95.9%	99.6%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	14.7%	16.1%	17.9%	17.5%	28.6%	15.9%	45.0%	32.3%
<b>Live music/ stage show</b>	11.0%	13.9%	14.8%	32.6%	29.2%	18.8%	16.4%	15.5%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.6%	5.7%	6.4%	10.1%	12.9%	6.0%	2.1%	6.6%
<b>Fine dining</b>	35.1%	37.2%	36.9%	43.3%	44.8%	36.0%	40.9%	49.1%
<b>Family restaurant</b>	51.5%	49.7%	25.2%	65.3%	38.9%	71.5%	30.6%	51.8%
<b>Fast food</b>	48.5%	46.3%	59.1%	57.7%	47.2%	54.4%	48.9%	68.1%
<b>Food truck</b>	40.3%	40.0%	17.3%	38.1%	24.8%	24.5%	12.3%	68.5%
<b>Café/ coffee house</b>	38.1%	36.4%	50.3%	50.7%	52.3%	62.8%	34.7%	63.7%
<b>Ethnic dining</b>	25.8%	28.1%	6.0%	27.7%	20.8%	14.4%	28.5%	27.0%
<b>Prepared own meal</b>	51.8%	49.4%	12.1%	48.4%	25.1%	20.2%	16.3%	19.9%

# O'AHU ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.0%	89.1%	97.7%	97.4%	93.5%	97.1%	93.9%	97.8%
<b>Mall/ department store</b>	44.8%	44.9%	87.3%	66.1%	59.6%	81.0%	67.4%	87.2%
<b>Designer boutique</b>	11.7%	12.7%	29.1%	18.8%	16.2%	23.0%	4.1%	6.6%
<b>Hotel/ resort store</b>	23.8%	24.4%	33.7%	34.0%	34.8%	30.6%	12.2%	25.7%
<b>Swap meet/ flea market</b>	14.1%	13.6%	2.7%	19.8%	7.7%	8.6%	0.0%	3.6%
<b>Discount/ outlet store</b>	12.2%	13.9%	28.7%	24.2%	17.3%	45.3%	36.6%	69.9%
<b>Supermarket</b>	60.2%	53.1%	66.9%	59.4%	59.4%	52.0%	67.4%	67.3%
<b>Farmer's market</b>	17.6%	18.0%	13.8%	27.2%	22.8%	14.0%	8.2%	14.6%
<b>Convenience store</b>	46.7%	46.1%	52.7%	62.0%	42.2%	69.0%	38.7%	65.0%
<b>Duty free store</b>	2.9%	4.0%	45.5%	8.4%	8.8%	7.7%	51.1%	45.1%
<b>Local shop/ artisan</b>	41.4%	46.1%	10.1%	54.6%	47.3%	44.2%	22.5%	18.6%

# O‘AHU ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	49.2%	61.0%	49.9%	71.5%	82.2%	70.7%	79.5%	65.0%
<b>Historic military site</b>	28.0%	41.4%	13.9%	36.6%	62.1%	45.7%	61.2%	18.6%
<b>Other historical site</b>	15.6%	19.5%	10.6%	21.9%	26.7%	17.8%	26.6%	23.0%
<b>Museum/ art gallery</b>	8.3%	10.3%	6.2%	14.4%	18.2%	13.8%	22.4%	6.6%
<b>Luau/ Polynesian show/ hula show</b>	9.2%	13.9%	12.9%	29.2%	29.6%	25.4%	12.2%	31.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	3.3%	3.7%	6.9%	8.8%	4.9%	8.1%	4.1%	7.5%
<b>Play/ concert/ theatre</b>	1.4%	1.9%	3.5%	4.9%	6.2%	3.1%	2.0%	4.4%
<b>Art/ craft fair</b>	3.3%	4.1%	4.8%	7.9%	5.9%	4.4%	8.1%	4.4%
<b>Festival event</b>	5.3%	5.0%	1.7%	5.3%	3.7%	2.3%	4.1%	1.8%



# O‘AHU ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	76.8%	74.0%	96.5%	97.2%	93.1%	97.4%	81.6%	97.8%
<b>Airport shuttle</b>	9.6%	10.7%	28.8%	27.5%	24.7%	43.9%	12.3%	16.4%
<b>Trolley</b>	0.9%	1.2%	60.4%	8.0%	6.3%	24.9%	6.1%	34.0%
<b>Public bus</b>	5.0%	5.4%	19.1%	27.1%	25.1%	25.7%	20.4%	16.8%
<b>Tour bus/ tour van</b>	3.9%	7.2%	24.4%	17.5%	28.8%	35.9%	10.2%	29.6%
<b>Taxi/ limo</b>	6.7%	8.1%	29.2%	27.6%	32.2%	37.7%	24.5%	27.0%
<b>Rental car</b>	58.2%	51.6%	17.8%	56.9%	34.5%	33.3%	36.7%	58.0%
<b>Ride share</b>	23.8%	22.8%	6.0%	22.3%	24.6%	27.5%	18.4%	20.4%
<b>Bicycle rental</b>	3.0%	2.6%	4.6%	4.4%	1.2%	1.8%	2.0%	2.2%

## O'AHU ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	50.2%	51.4%	13.8%	21.8%	21.3%	5.1%	16.3%	20.4%
Visit friends/ family	49.8%	50.8%	12.8%	21.2%	20.7%	5.1%	16.3%	20.4%
Volunteer non profit	0.8%	1.0%	1.2%	0.8%	1.8%	0.3%	0.0%	0.4%

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Atlantis Submarine &amp; Cruises</b>	0.8%	1.7%	6.4%	2.3%	5.2%	3.8%	14.3%	3.1%
<b>Bernice P. Bishop Museum</b>	2.7%	3.2%	2.6%	3.9%	5.5%	2.9%	4.1%	1.8%
<b>Byodo In Temple</b>	6.1%	7.4%	1.2%	8.2%	11.1%	6.7%	2.1%	1.3%
<b>Chinatown/ Hnl Arts District</b>	10.4%	10.8%	10.2%	12.7%	14.3%	10.0%	20.4%	4.9%
<b>Diamond Head State Monument</b>	13.4%	20.6%	24.1%	41.1%	48.0%	36.9%	26.5%	51.3%
<b>Dole Plantation</b>	17.5%	23.9%	11.2%	34.3%	29.8%	31.5%	24.5%	45.5%
<b>Haleiwa</b>	25.9%	25.4%	23.4%	26.0%	24.6%	11.6%	2.1%	13.3%
<b>Hanauma Bay Nature Reserve</b>	9.1%	10.9%	14.0%	30.7%	21.5%	19.4%	40.8%	30.5%
<b>Harold L. Lyon Arboretum</b>	0.7%	1.2%	0.9%	1.0%	1.8%	1.1%	4.1%	1.3%
<b>Hawaii State Art Museum or Honolulu Museum of Art</b>	1.6%	1.9%	3.1%	3.7%	4.7%	2.1%	4.1%	2.6%
<b>Hawaiian Mission Houses, historic site and archives</b>	0.6%	0.9%	0.4%	2.6%	4.0%	1.1%	2.0%	2.2%
<b>Hawaii's Plantation Village</b>	0.7%	1.2%	0.8%	1.6%	3.9%	0.8%	4.1%	1.8%

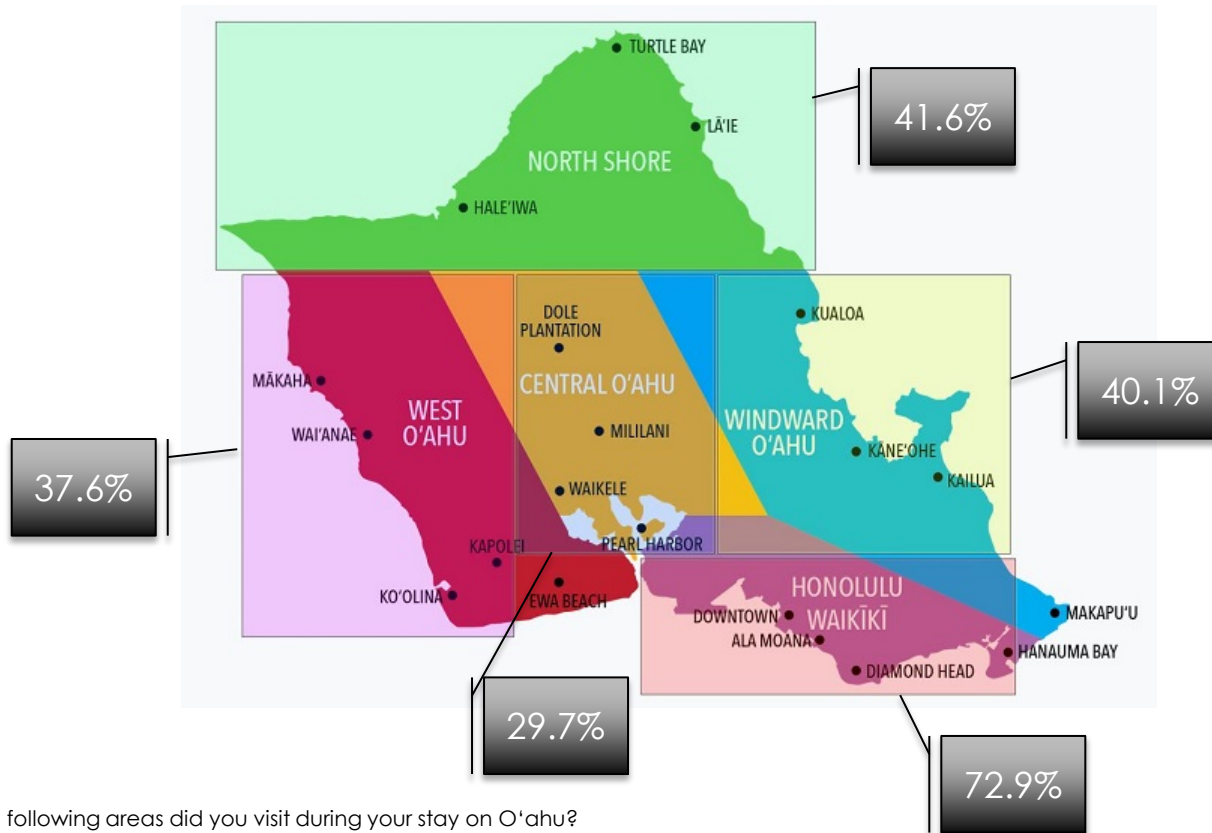
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Honolulu Zoo</b>	4.8%	5.9%	6.0%	11.1%	10.6%	9.8%	6.1%	7.5%
<b>Ho‘omaluhia Botanical Garden</b>	6.0%	6.8%	0.3%	3.6%	6.3%	3.7%	0.0%	1.8%
<b>Iolani Palace State Monument</b>	3.2%	4.4%	7.8%	6.8%	12.8%	6.3%	16.3%	11.9%
<b>Ka iwi State Scenic Shoreline/ Makapu‘u Trail</b>	5.8%	10.1%	3.2%	8.5%	8.3%	1.7%	2.0%	0.9%
<b>Kakaako Street Art</b>	2.0%	2.1%	17.0%	2.8%	3.3%	1.8%	0.0%	5.8%
<b>Koko Head Center Trail</b>	7.7%	10.1%	2.8%	9.7%	12.4%	4.1%	2.0%	3.1%
<b>Kualoa Private Nature Reserve</b>	7.6%	9.9%	8.6%	10.4%	9.2%	12.3%	26.5%	17.2%
<b>Lanikai or Kailua Beach</b>	31.5%	34.3%	23.8%	35.2%	29.6%	18.9%	6.1%	31.4%
<b>Manoa Falls &amp; Trail</b>	6.2%	9.4%	1.8%	12.9%	12.5%	6.4%	6.2%	3.5%
<b>National Memorial Cemetery of the Pacific</b>	5.1%	9.4%	1.2%	8.0%	14.9%	9.1%	6.1%	5.8%
<b>Nu‘uanu Pali Lookout</b>	10.4%	14.6%	2.3%	16.2%	17.6%	9.6%	18.4%	11.1%

## ATTRACTIONS – O‘AHU (cont.)

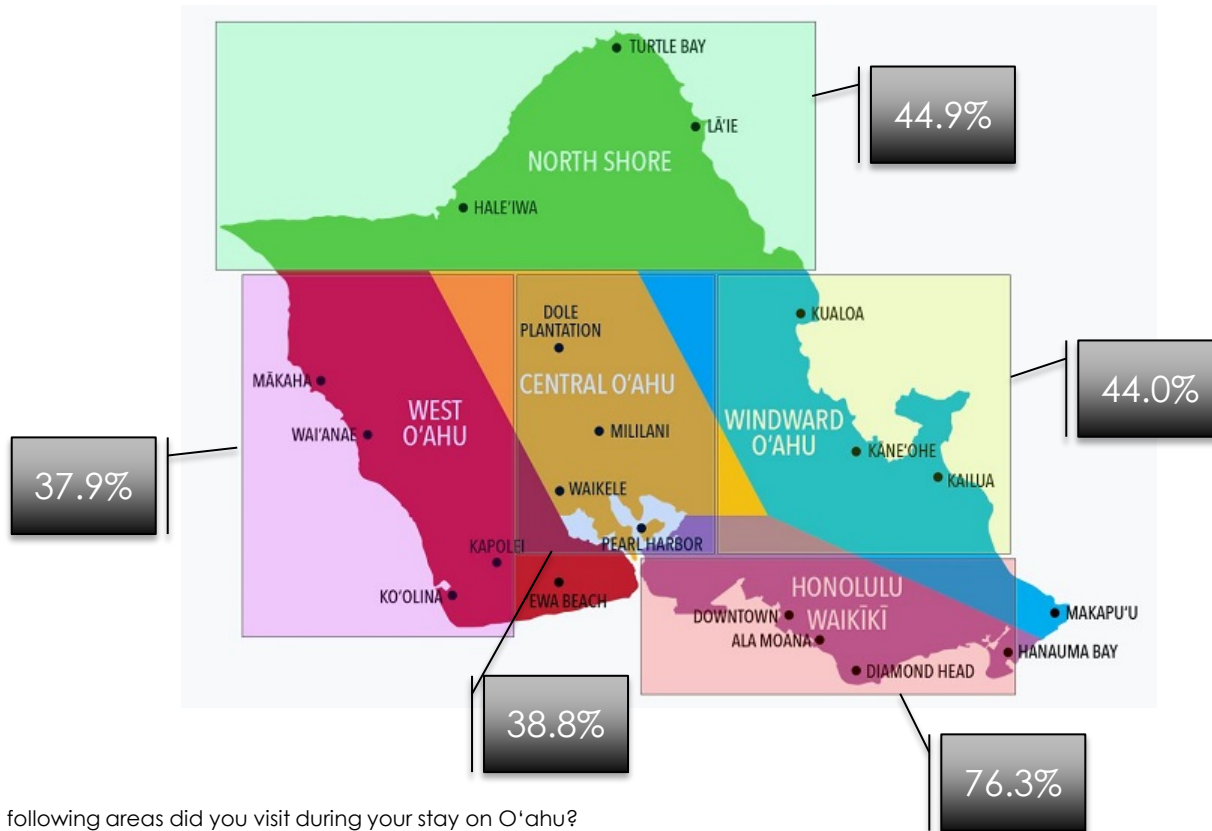
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>North Shore Beaches</b>	49.3%	54.0%	16.5%	56.7%	51.1%	42.9%	26.5%	37.2%
<b>Pearl Harbor</b>	24.3%	37.6%	5.7%	35.1%	63.1%	41.2%	57.0%	13.3%
<b>Polynesian Cultural Center</b>	5.0%	6.1%	3.1%	18.0%	18.7%	13.6%	14.3%	24.3%
<b>Queen’s Emma Summer Palace</b>	0.9%	1.6%	0.4%	2.4%	3.3%	2.3%	2.0%	1.8%
<b>Sea Life Park Hawaii</b>	1.3%	1.6%	1.9%	5.1%	1.9%	2.3%	10.2%	1.8%
<b>Waikiki Aquarium</b>	1.6%	2.1%	4.4%	11.7%	5.2%	7.3%	4.1%	5.3%
<b>Waimanalo Beach Park</b>	11.5%	14.3%	2.9%	17.7%	16.8%	6.5%	0.0%	9.8%
<b>Waimea Valley</b>	15.7%	19.0%	1.5%	18.2%	17.3%	12.1%	2.0%	3.1%

# AREAS VISITED U.S. WEST



430 Q Which of the following areas did you visit during your stay on O'ahu?

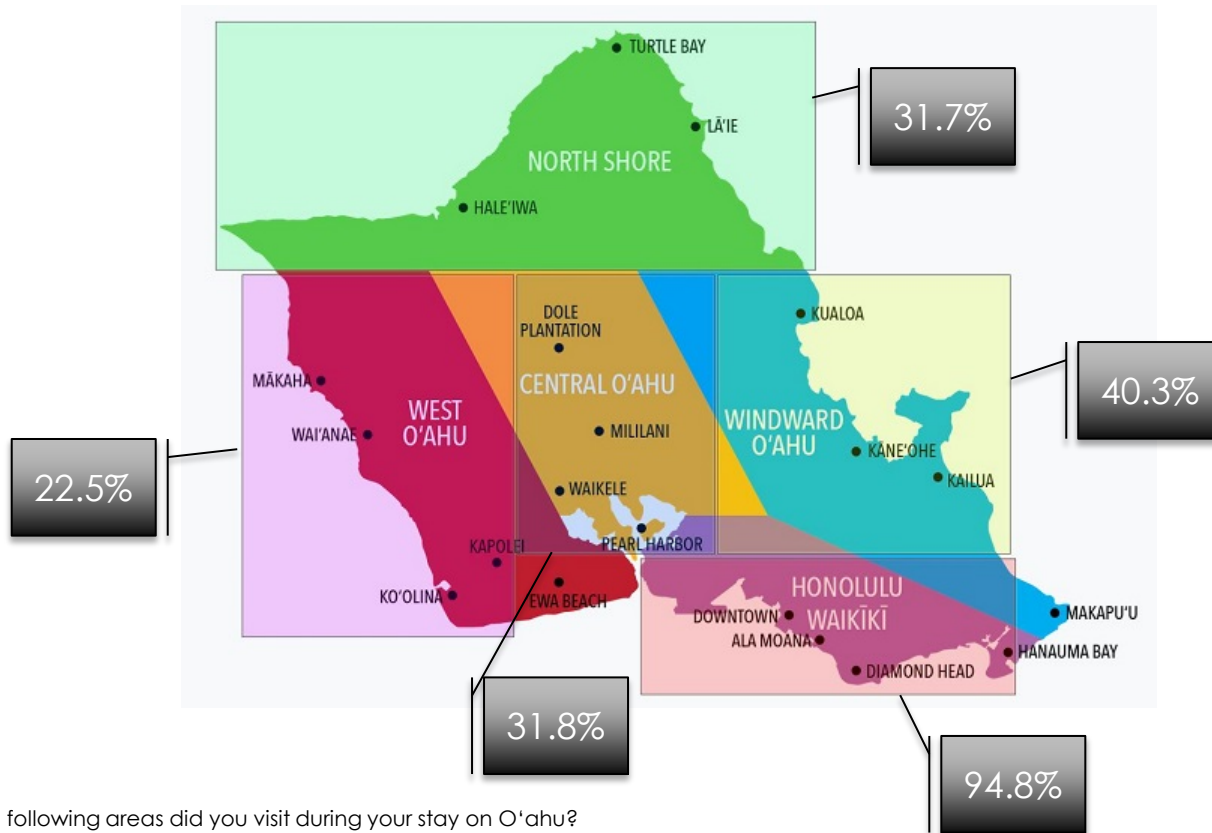
# AREAS VISITED U.S. EAST



431 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

# AREAS VISITED JAPAN

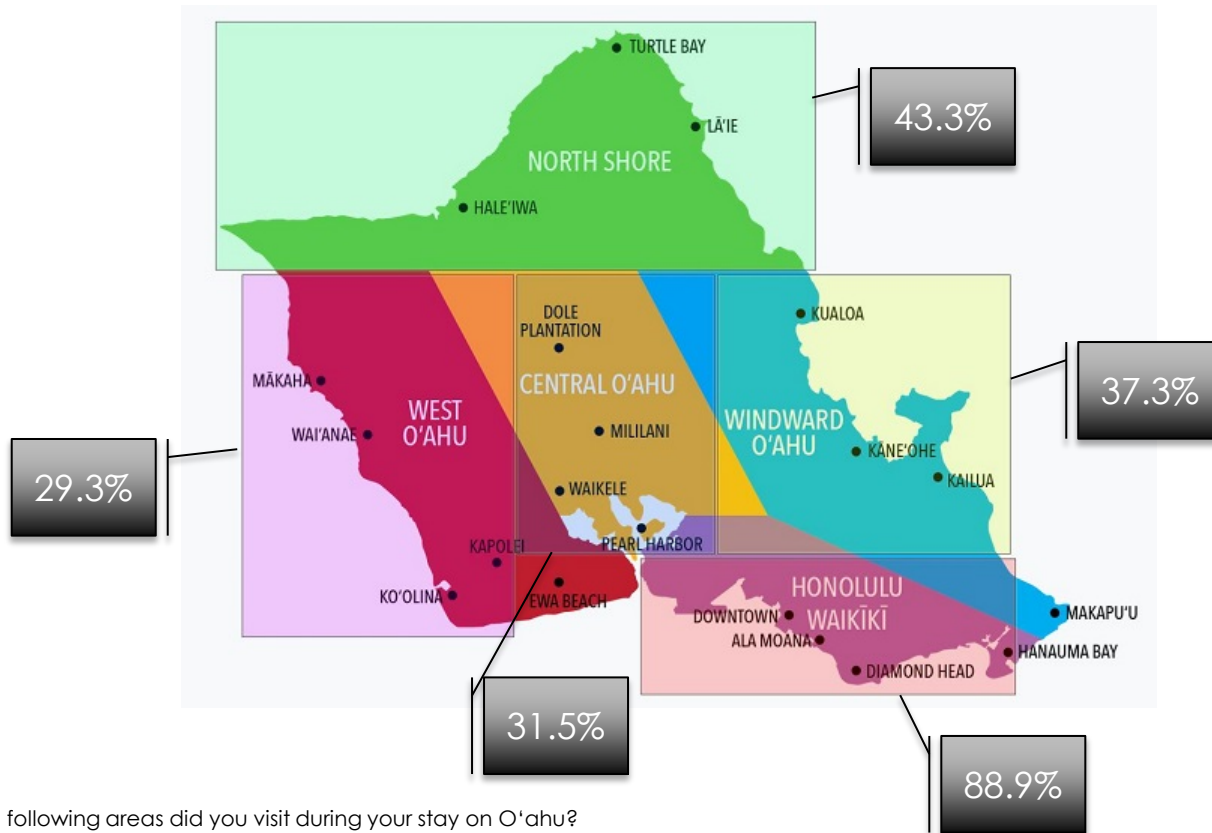


432 Q Which of the following areas did you visit during your stay on O'ahu?

[A]



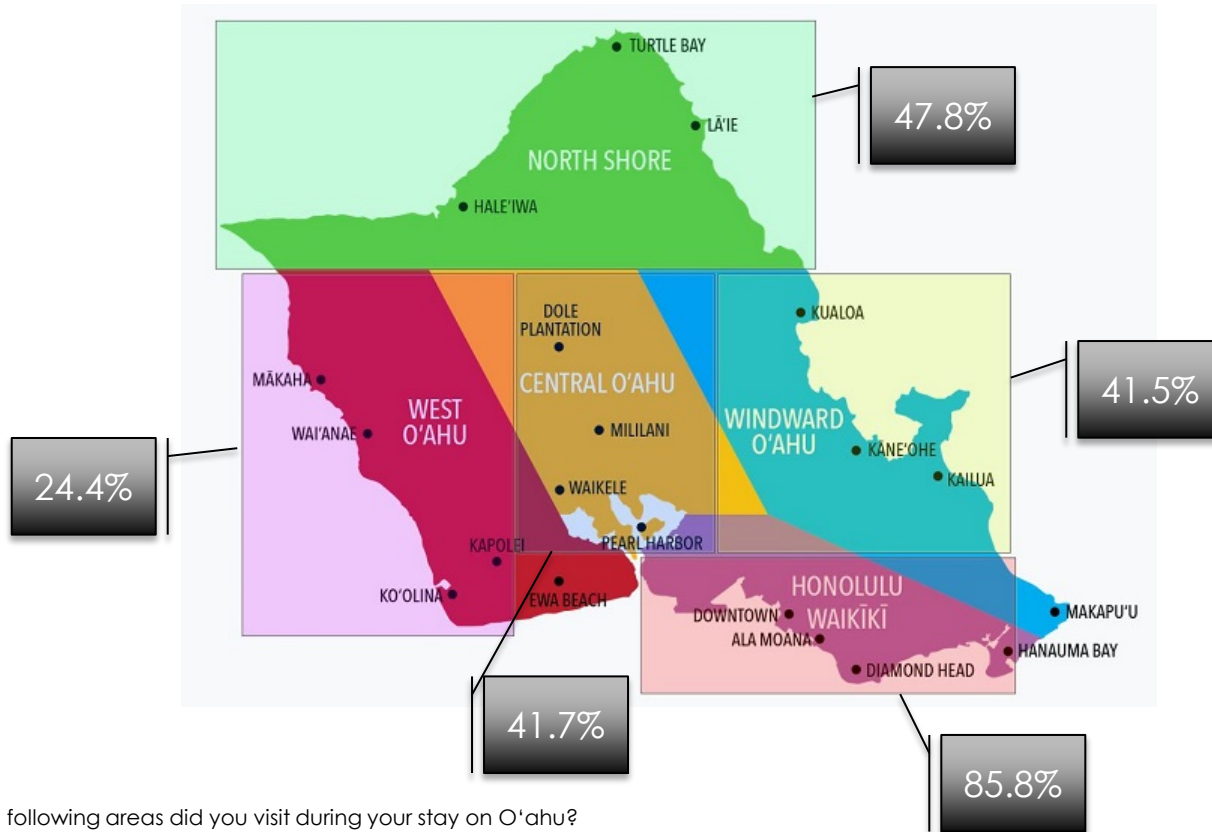
# AREAS VISITED CANADA



433 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

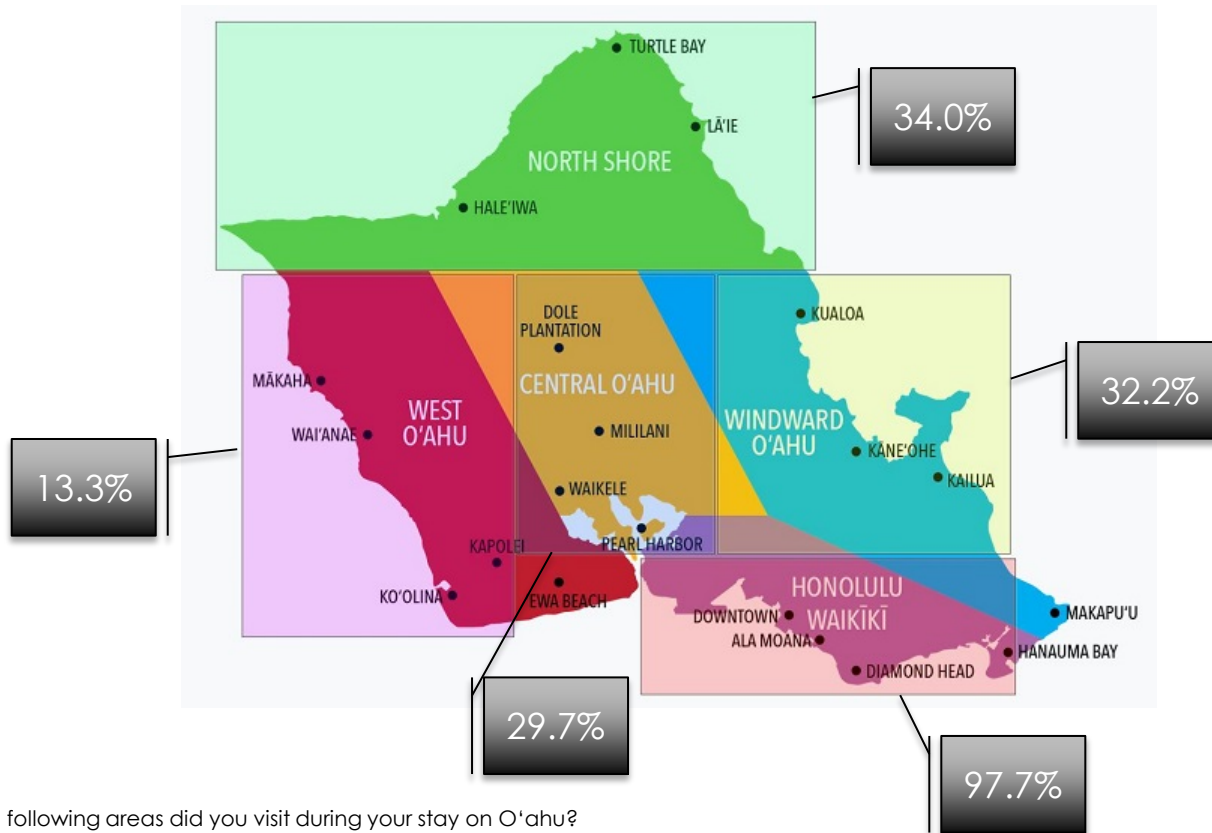
# AREAS VISITED EUROPE



434 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

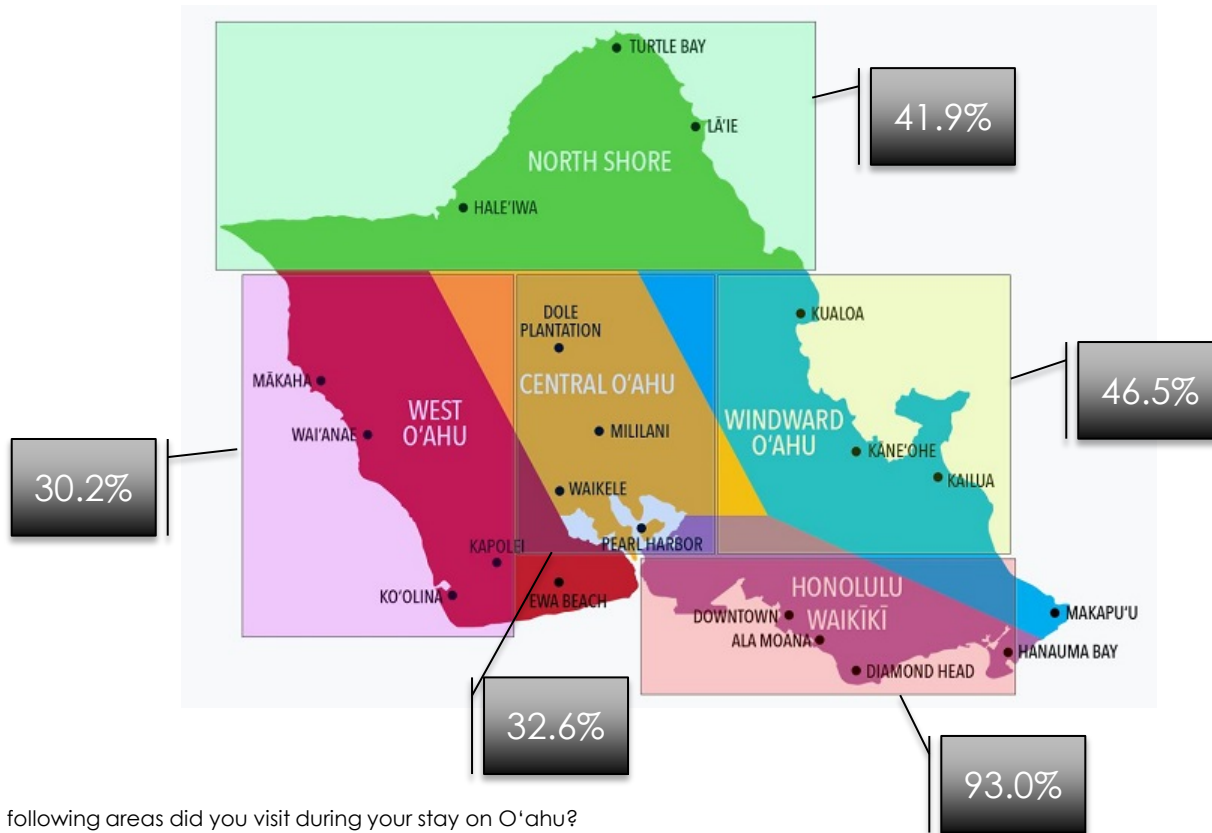
# AREAS VISITED OCEANIA



435 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

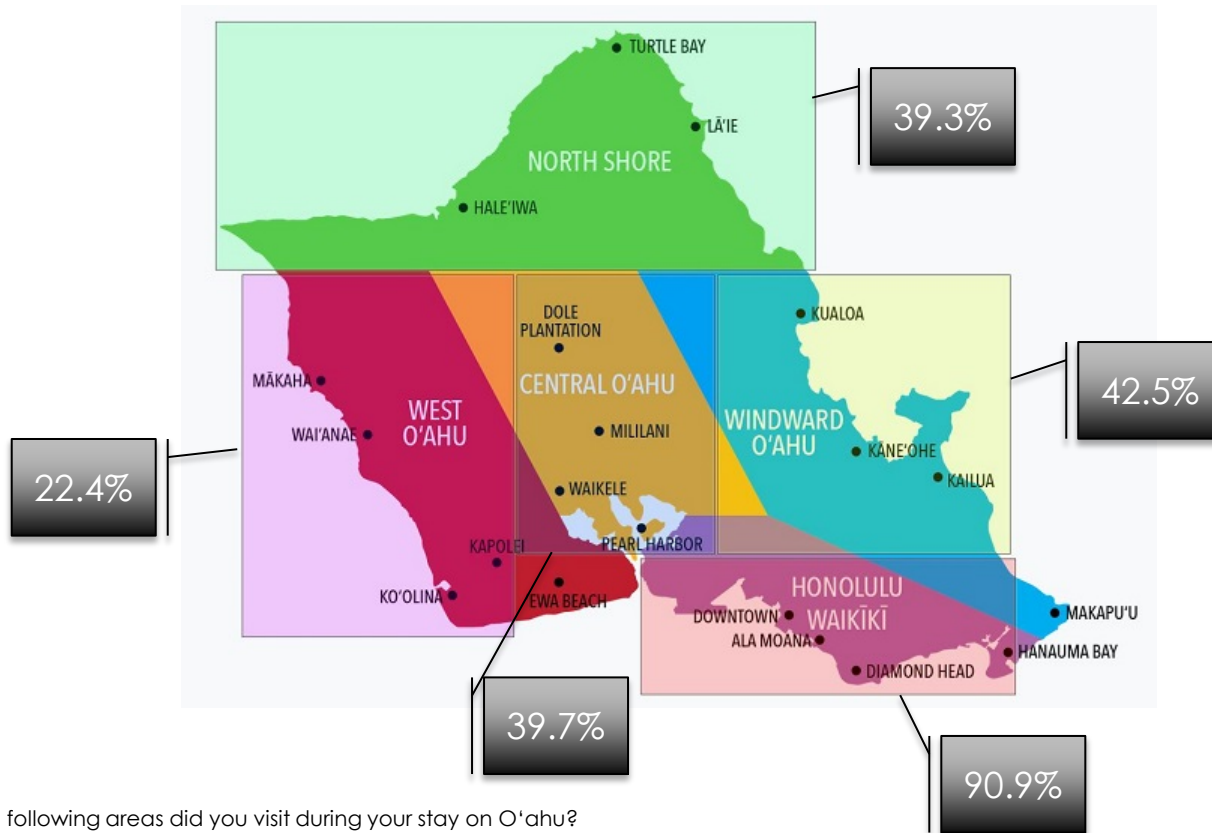
# AREAS VISITED CHINA



436 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

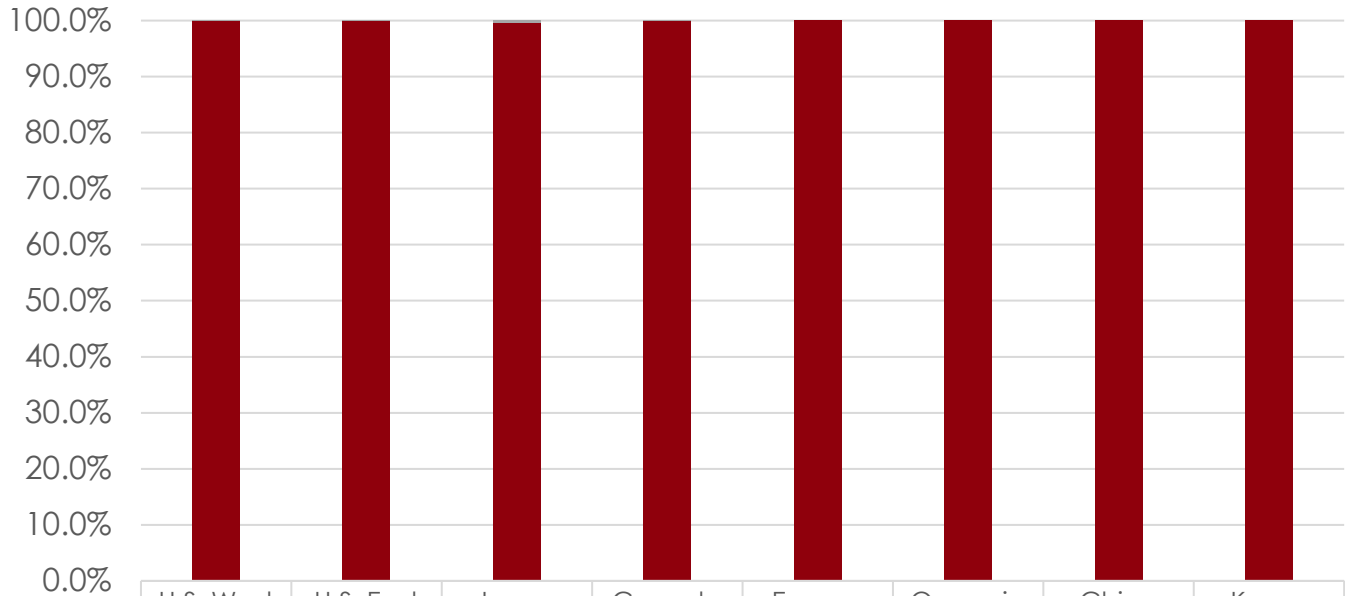
# AREAS VISITED KOREA



437 Q Which of the following areas did you visit during your stay on O'ahu?

[A]

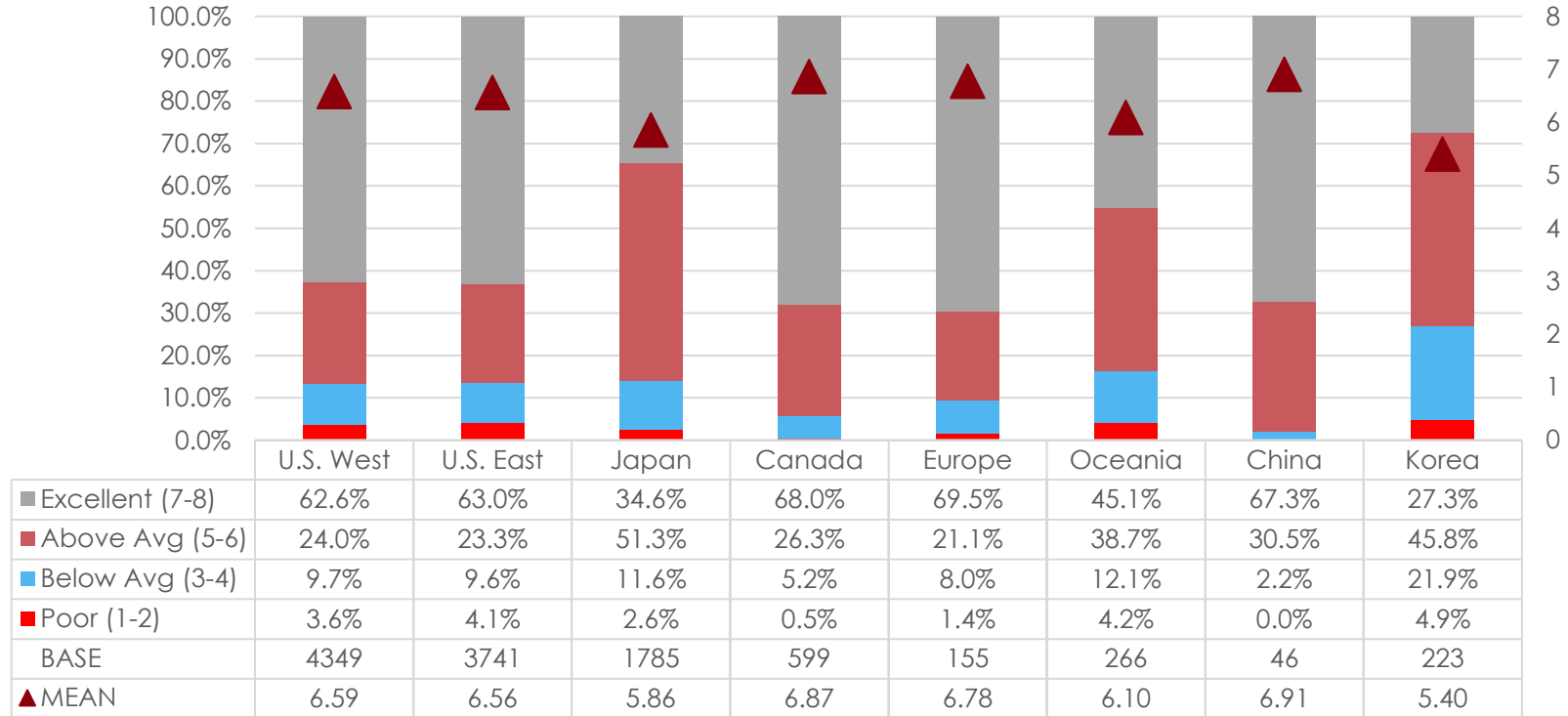
# TRANSPAC TRAVEL OPTIONS – O‘AHU



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Cruise Ship/ Ocean vessel	0.1%	0.1%	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%
■ Air/ flight	99.9%	99.9%	99.6%	99.9%	100.0%	100.0%	100.0%	100.0%
BASE	4352	3748	1793	601	155	266	46	224

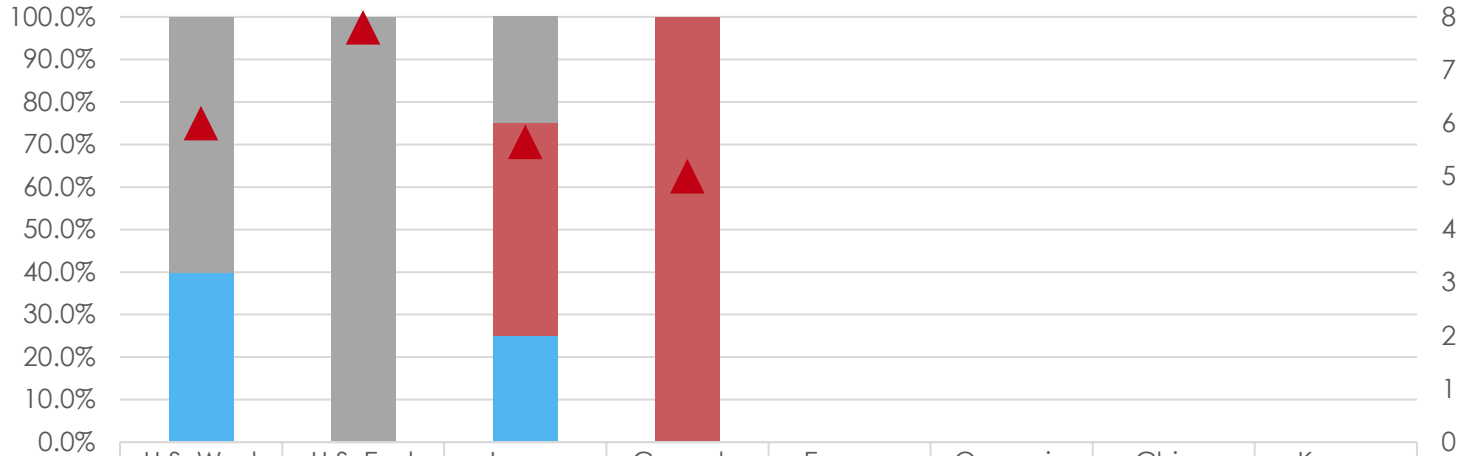
# SATISFACTION – Daniel K. Inouye International Airport

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



# SATISFACTION – Honolulu Harbor

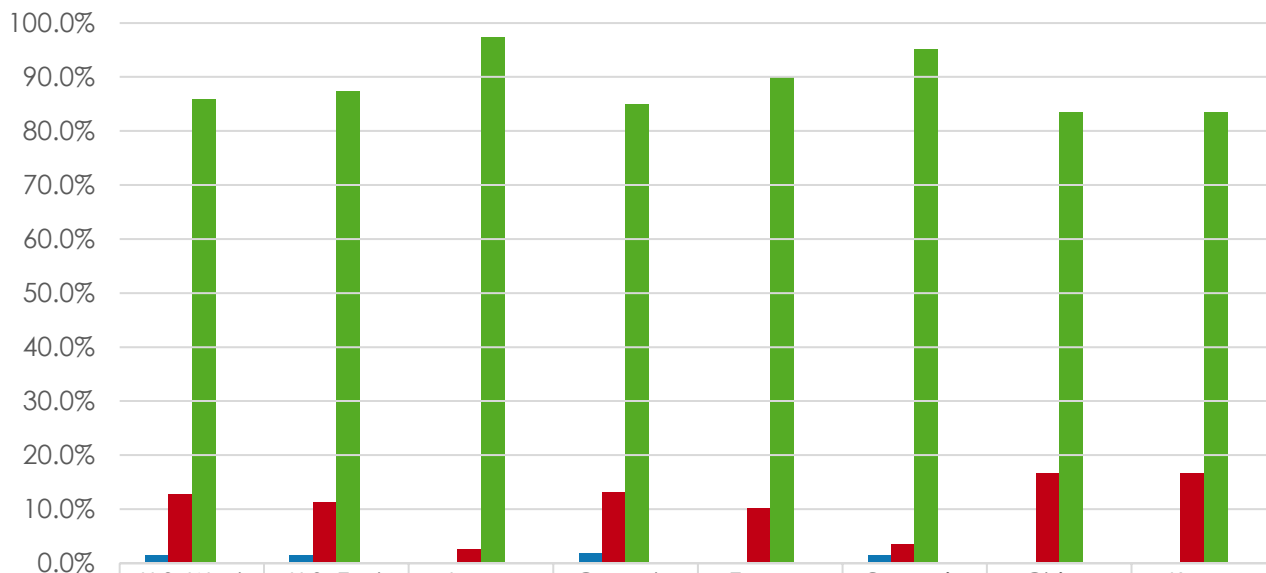
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	60.0%	100.0%	25.0%	0.0%				
■ Above Avg (5-6)	0.0%	0.0%	50.0%	100.0%				
■ Below Avg (3-4)	40.0%	0.0%	25.0%	0.0%				
■ Poor (1-2)	0.0%	0.0%	0.0%	0.0%				
BASE	3	5	8	1				
▲ MEAN	6.00	7.80	5.65	5.00				



# SNORKELING EQUIPMENT USED – O‘AHU



Other Response	1.4%	1.4%	0.0%	1.9%	0.0%	1.5%	0.0%	0.0%
Full-face snorkel mask	12.7%	11.3%	2.6%	13.2%	10.1%	3.4%	16.6%	16.6%
2-Piece, separate mask & snorkel	85.8%	87.3%	97.4%	84.9%	89.9%	95.1%	83.4%	83.4%
BASE	1,403	1,033	249	219	40	60	6	108

## SNORKELING EQUIPMENT USED – O‘AHU

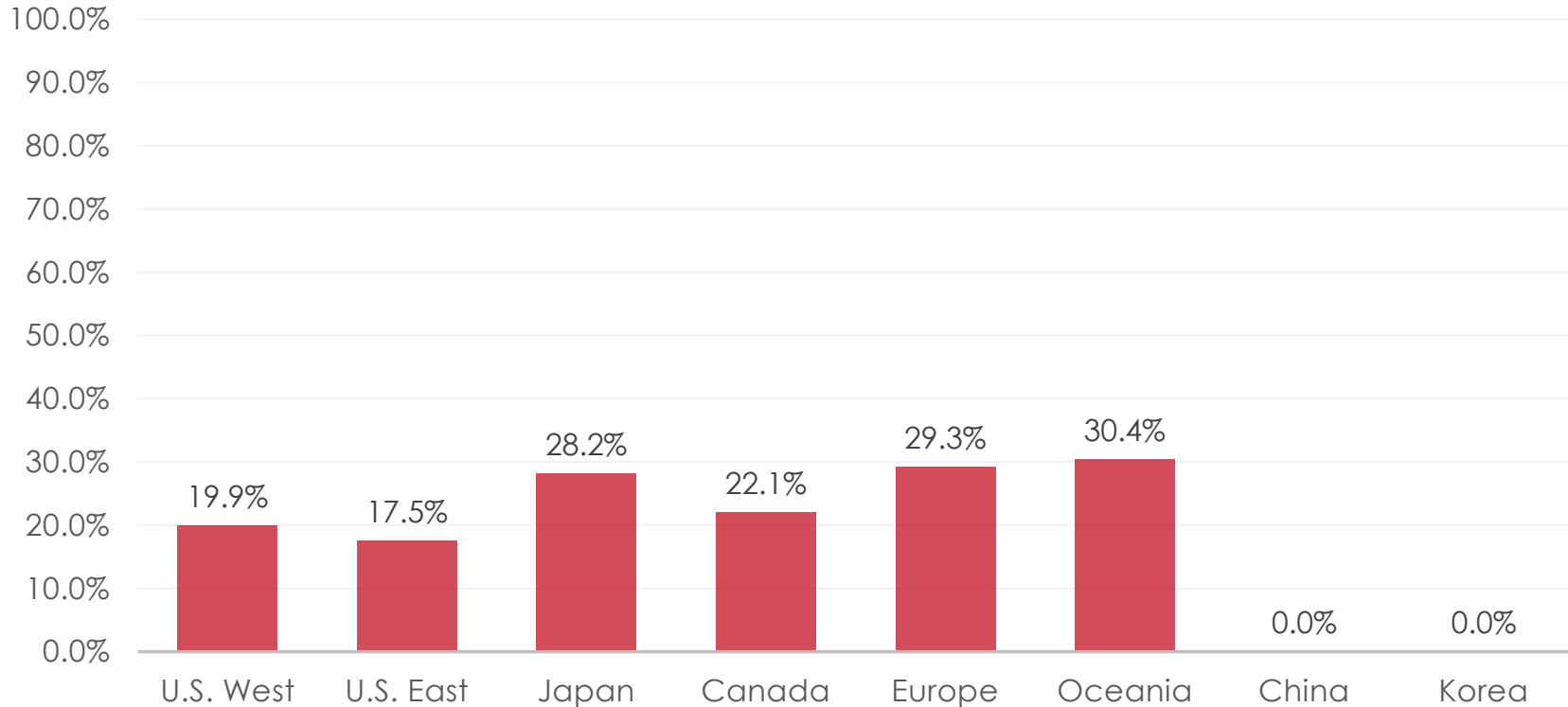
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	97.7%	98.5%	97.9%	97.0%	100.0%	100.0%	100.0%	99.1%
Yes, while using a 2 piece mask & snorkel	0.9%	0.9%	1.6%	2.2%	0.0%	0.0%	0.0%	0.9%
Yes, while using a full face snorkel mask	0.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.8%	0.5%	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – KAUA‘I

# ADVERTISING AWARENESS – KAUA‘I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

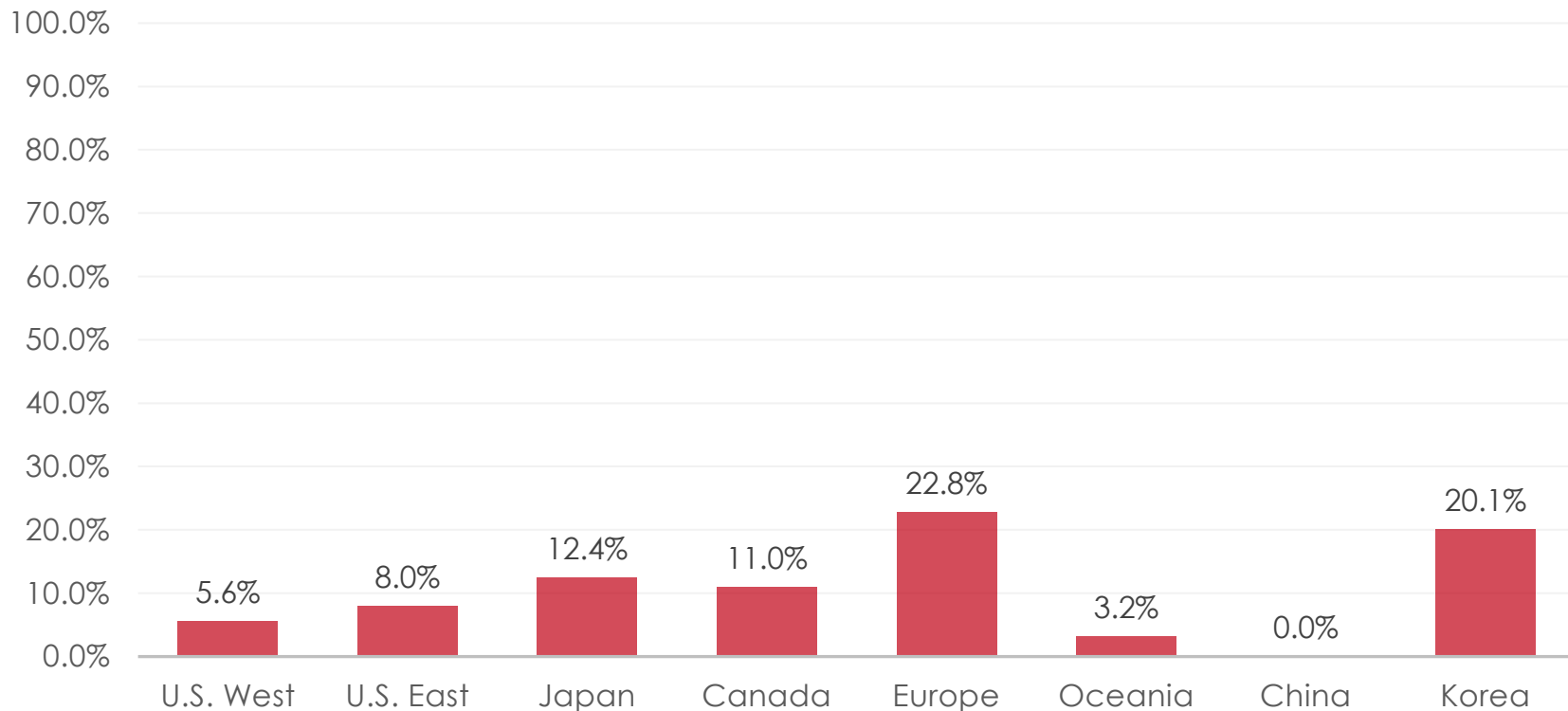


# ADVERTISING AWARENESS – KAUA‘I

- Older visitors above the age of 50 from U.S. West and U.S. East were more likely to be exposed to advertising for Kaua‘i than younger visitors from these markets.
- Less affluent visitors from Canada were more likely to have been exposed to advertising from Kaua‘i.
- Female visitors from U.S. West were more likely to recall advertising for Kaua‘i than males from this visitor market.
- Visitors from U.S. East whose trip consisted of multiple island stays were more likely to recall advertising for Kaua‘i than were those whose trip consisted of just visiting Kaua‘i.

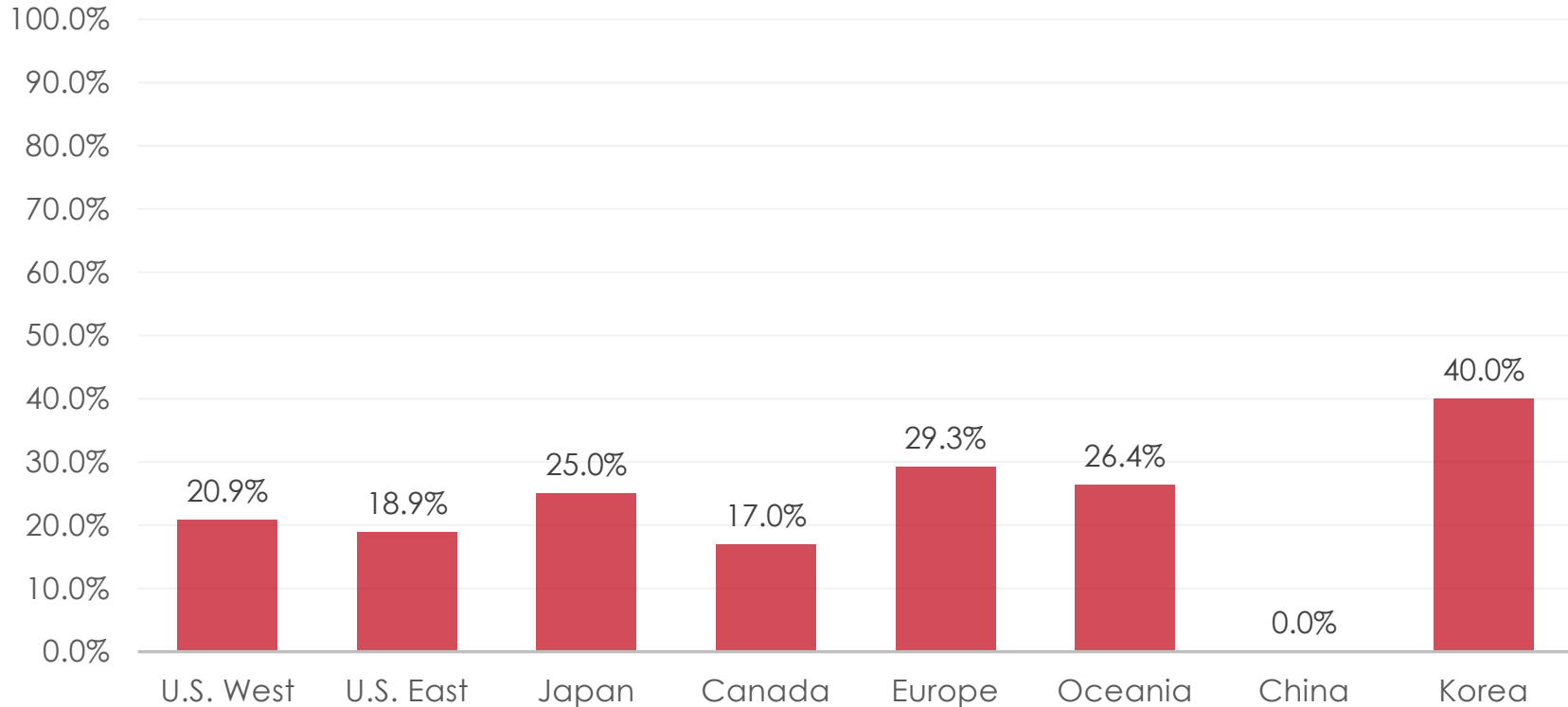
# IMPACT OF LOCATION FILMING— KAUA'I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



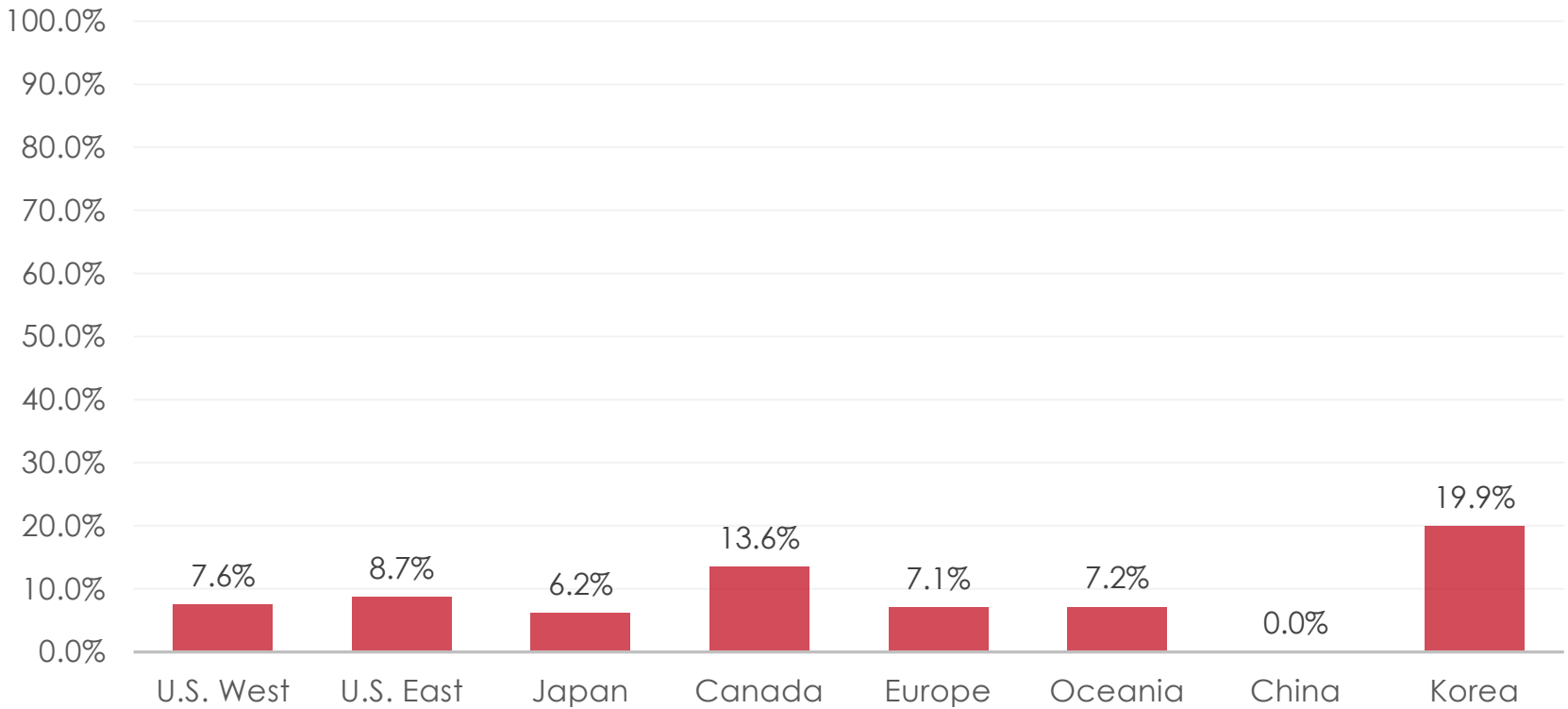
# IMPACT OF OUTDOOR/ SPORTING EVENTS – KAUA‘I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



# IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – KAUA‘I

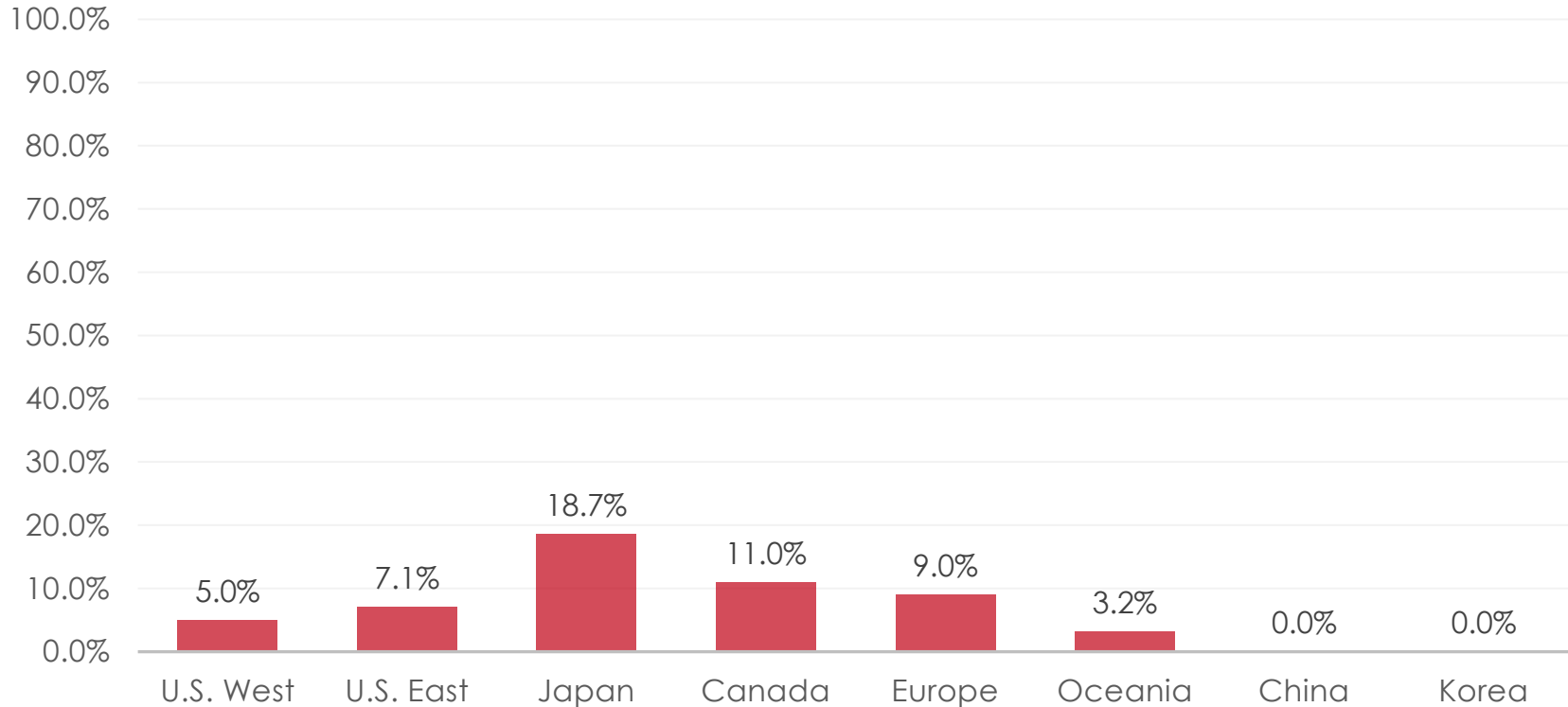
Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents





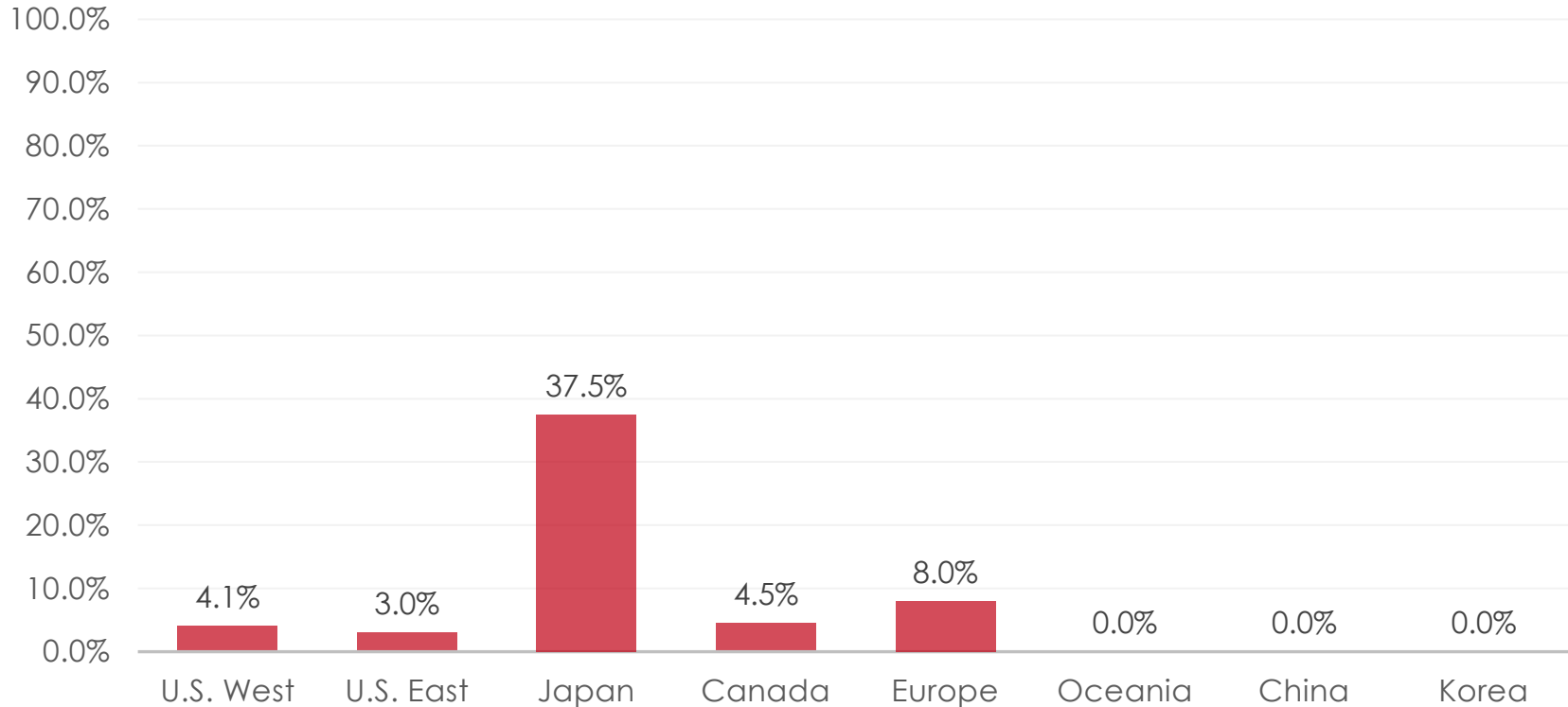
# IMPACT OF HAWAIIAN CULTURAL EVENTS – KAUA‘I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

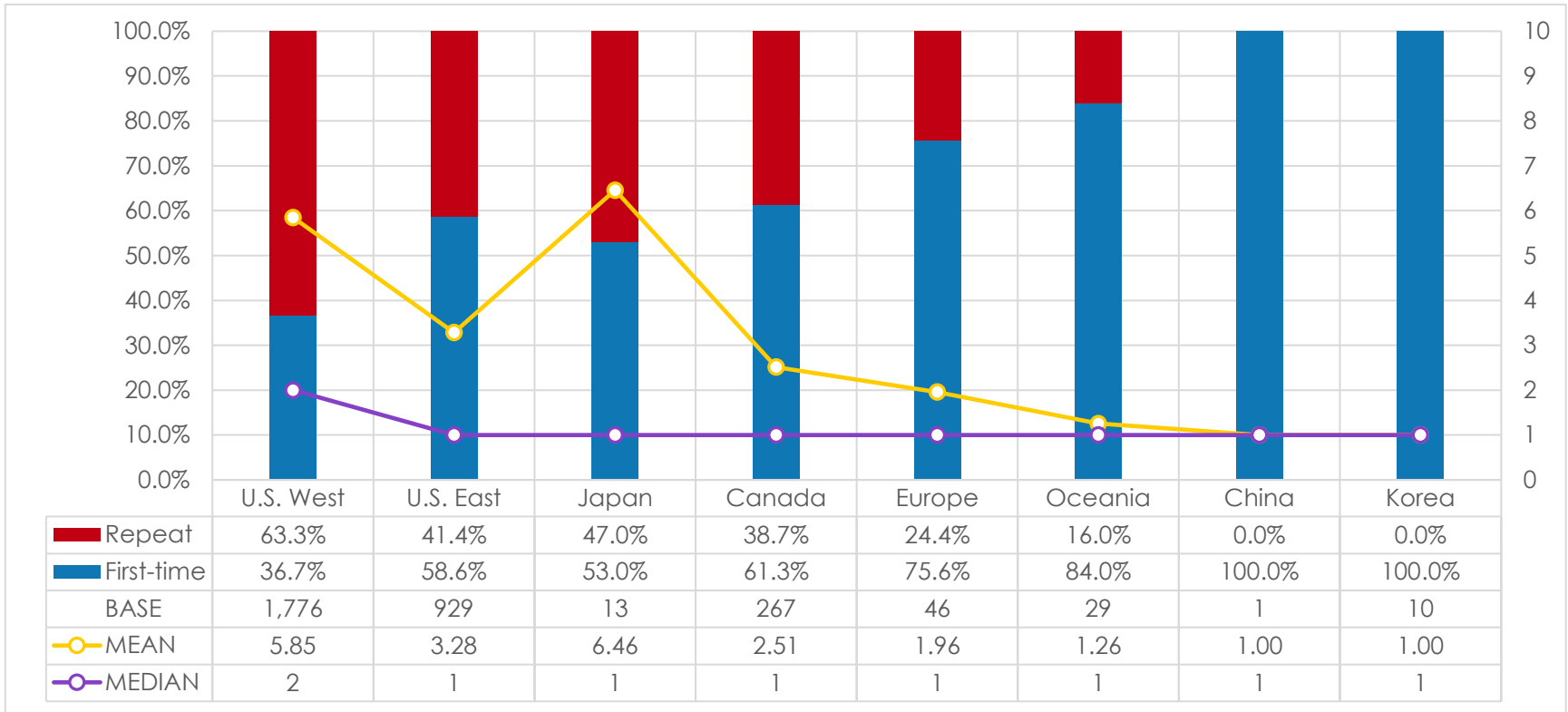


# IMPACT OF HAWAIIAN MUSIC – KAUA‘I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - KAUA'I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - KAUA'I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Senior visitors from U.S. West, U.S. East, and Canada have visited Kaua'i more often than younger travelers from these markets.
- More affluent travelers from U.S. West have been to Kaua'i on a more frequent basis than less affluent travelers from this region.
- Male travelers from U.S. East have visited Kaua'i more often than female travelers from this visitor market.
- Visitors who traveled by themselves on this most recent trip to Kaua'i have visited the island more frequently compared to those in larger travel parties.

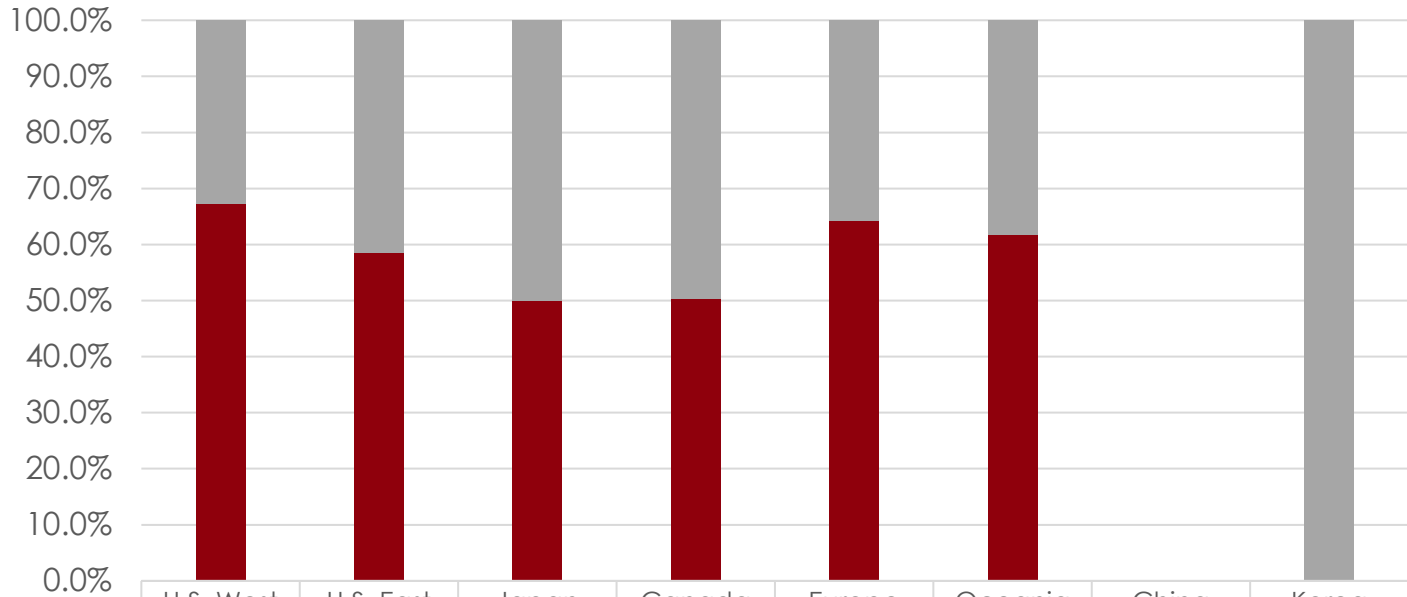
# ACCOMMODATIONS - KAUA'I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hotel/ resort/ villa	36.9%	39.6%	15.6%	35.0%	53.1%	38.4%	0.0%	30.0%
Timeshare Unit	24.8%	18.4%	0.0%	13.1%	9.9%	0.0%	0.0%	0.0%
Vacation rental (includes Airbnb, VRBO, etc.)	20.5%	15.1%	12.4%	30.7%	4.8%	20.8%	0.0%	19.9%
Condominium	19.0%	10.7%	37.6%	16.8%	9.9%	3.2%	0.0%	0.0%
Stayed with friends or relatives	8.3%	7.7%	0.0%	2.7%	1.9%	0.0%	0.0%	0.0%
Cruise Ship	1.6%	13.2%	24.9%	10.0%	16.2%	35.2%	0.0%	0.0%
Rental House	4.7%	3.7%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%
Own property/ 2nd home	2.9%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Private Room in Private Home	2.5%	1.9%	0.0%	1.1%	1.9%	0.0%	0.0%	0.0%
Camp Site, Beach	1.4%	1.3%	0.0%	5.3%	3.8%	7.2%	0.0%	9.9%
Day trip/ Did not stay overnight	0.5%	1.6%	9.4%	1.1%	2.4%	3.2%	100.0%	50.1%

# ACCOMMODATIONS - KAUA'I

## Vacation rental/ Rental house/ Private room/ Shared room



BASE	473	188	2	92	3	6		2
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# ACCOMMODATIONS - KAUA'I

## Vacation rental/ Rental house/ Private room/ Shared room

Caution small base: Japan, Canada, Europe, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	39.0%	37.3%	50.0%	32.4%	35.9%	53.7%	0.0%	0.0%
Price/ value/ best deal	16.6%	25.5%	0.0%	20.2%	28.3%	30.9%	0.0%	100.0%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	19.4%	14.9%	0.0%	22.6%	0.0%	15.4%	0.0%	0.0%
Owned by self, friend or relative	10.2%	11.2%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%
Ability to have travel party members stay together	5.5%	6.9%	50.0%	6.7%	0.0%	0.0%	0.0%	0.0%
Recommended friends/ family	4.2%	1.6%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%
Availability	3.2%	1.6%	0.0%	7.1%	35.9%	0.0%	0.0%	0.0%
No choice/ part of package	0.8%	1.1%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%

# STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	35.8%	44.5%	43.7%	43.7%	60.3%	23.3%	100.0%	60.0%
Beach/ ocean	18.1%	9.3%	9.4%	11.7%	4.3%	20.9%	0.0%	9.9%
Variety of activities/ attractions/ many choices	11.4%	14.6%	25.0%	15.5%	10.9%	31.7%	0.0%	20.1%
Feeling of the "Aloha Spirit"	8.4%	6.8%	0.0%	8.4%	8.0%	0.0%	0.0%	9.9%
Overall customer service/ hospitality/ the people	5.9%	4.4%	0.0%	3.7%	4.3%	3.3%	0.0%	0.0%
Local culture/ people/ music	3.1%	3.9%	0.0%	4.5%	3.8%	3.3%	0.0%	0.0%
Events/ celebrations with friends/ family	2.7%	3.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%
Accommodations/ was as promised	3.0%	1.8%	0.0%	1.9%	4.3%	3.3%	0.0%	0.0%
Food/ restaurant variety/ dining options	2.1%	1.6%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Accommodations/ good service from staff	1.6%	1.1%	0.0%	0.8%	0.0%	3.3%	0.0%	0.0%
Feeling safe (able to walk at night)	1.2%	0.8%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%



# STRENGTHS/ POSITIVE ASPECTS - KAUA'I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

- First-time visitors from U.S. West and U.S. East were more likely to single out the island's natural beauty while repeat visitors were more likely to favor Kaua'i's beaches and oceans.
- First-time visitors from U.S. West were also more likely to be impressed with the variety of activities and attractions, more so than repeat visitors to the state.
- Kaua'i's natural beauty is more likely to be a strength among younger travelers under the age of 35 from U.S. West.
- Less educated travelers from U.S. West were more likely to mention the aloha spirit and solid customer service as being highlights from their trip.
- Male visitors from U.S. West mention the variety of attractions and activities more often while females from this visitor market were more likely to be impressed with the island's natural beauty.
- Those here in larger travel parties were more likely to list beaches and the ocean as highlights from their trip.

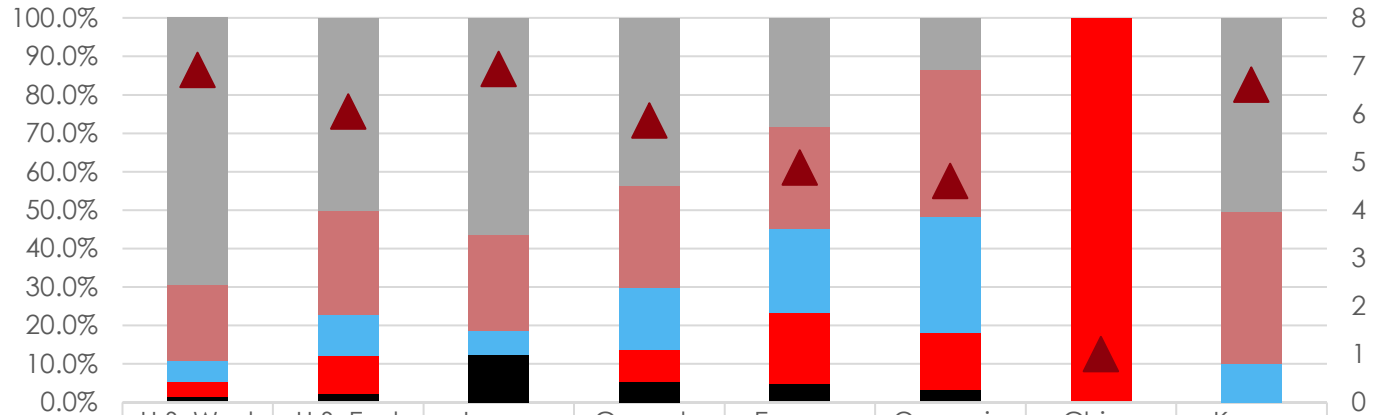
# AREAS OF OPPORTUNITIES - KAUA'I

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	40.7%	42.4%	49.9%	38.0%	43.1%	57.5%	0.0%	40.1%
Traffic (congested/slow)	8.1%	9.1%	0.0%	17.7%	17.0%	3.3%	0.0%	0.0%
COVID 19	10.3%	7.3%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Food/ restaurant variety/ dining options	7.1%	6.2%	9.4%	4.5%	4.3%	10.8%	0.0%	9.9%
Would like to experience more local culture	5.2%	6.3%	6.2%	5.7%	10.4%	0.0%	0.0%	9.9%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	6.0%	5.6%	0.0%	3.1%	0.0%	3.3%	0.0%	0.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	4.6%	5.4%	18.8%	10.6%	1.9%	3.3%	0.0%	19.9%
Variety of activities/ attractions	3.5%	2.4%	0.0%	1.7%	2.4%	4.1%	0.0%	0.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	1.5%	2.8%	0.0%	3.5%	9.0%	3.3%	0.0%	0.0%
Overall customer service/ hospitality/ the people	1.7%	2.2%	6.2%	1.6%	2.4%	3.3%	0.0%	0.0%

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	69.5%	50.0%	56.4%	43.5%	28.3%	13.4%	0.0%	50.3%
Somewhat likely (5-6)	19.5%	27.1%	24.9%	26.6%	26.6%	38.4%	0.0%	39.8%
Somewhat unlikely (3-4)	5.8%	11.0%	6.2%	16.3%	21.8%	29.9%	0.0%	9.9%
Very unlikely (1-2)	3.7%	9.7%	0.0%	8.1%	18.6%	15.0%	100.0%	0.0%
Not sure	1.4%	2.3%	12.4%	5.4%	4.8%	3.3%	0.0%	0.0%
BASE	1,776	929	13	266	46	28	1	10
MEAN	6.92	6.05	6.93	5.86	4.88	4.61	1.00	6.61

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Those whose trip consisted of visiting just Kaua‘i were more likely to return to the island compared to those whose most recent trip included stops on multiple islands. This trend was present among visitors from U.S. West, U.S. East, and Canada.
- Visitors from U.S. West and U.S. East who traveled alone to Kaua‘i were more likely to return to the island in the next five years compared to those who visited the island in larger travel parties.

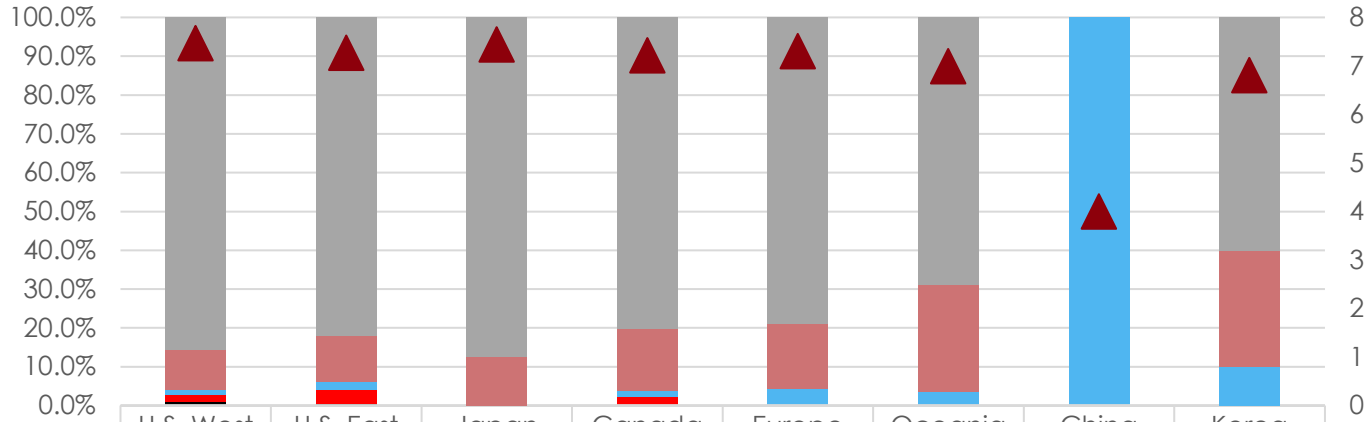
# REASONS FOR NOT RETURNING - KAUA'I

Caution small base: Japan, Canada, Europe, Oceania, China, and Korea less than 100 respondents

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	50.1%	47.9%	0.0%	53.1%	34.7%	77.6%	0.0%	0.0%
Too expensive/cost	17.0%	20.6%	66.7%	28.6%	35.8%	25.8%	0.0%	0.0%
Flight too long	4.5%	23.9%	0.0%	21.2%	57.0%	24.1%	0.0%	0.0%
No reason to return/ nothing new	11.6%	10.8%	0.0%	14.5%	4.2%	6.9%	0.0%	0.0%
Unfriendly people/ felt unwelcome	11.2%	8.5%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Not enough value for the price	5.0%	7.5%	0.0%	14.1%	5.3%	8.6%	0.0%	100.0%
Other financial obligations	5.1%	8.9%	0.0%	6.0%	21.1%	0.0%	0.0%	0.0%
Poor health/ age restriction	2.1%	7.0%	33.3%	3.8%	10.6%	0.0%	0.0%	0.0%
Too crowded/ congested/ traffic	5.8%	2.4%	0.0%	6.7%	4.2%	0.0%	0.0%	0.0%
COVID 19	6.6%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nothing to do/ boring	6.6%	2.8%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%

# KAUA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	85.7%	82.1%	87.6%	80.3%	79.1%	69.0%	0.0%	60.2%
■ Somewhat likely (5-6)	10.1%	11.8%	12.4%	15.9%	16.6%	27.5%	0.0%	29.8%
■ Somewhat unlikely (3-4)	1.4%	2.0%	0.0%	1.5%	4.4%	3.5%	100.0%	9.9%
■ Very unlikely (1-2)	2.1%	3.4%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
■ Not sure	0.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	1,775	929	13	266	45	27	1	10
▲ MEAN	7.47	7.27	7.44	7.22	7.30	6.99	4.00	6.81

# KAUA'I - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Less affluent visitors from U.S. West were more likely to recommend Kaua'i to others compared to more affluent visitors from this market.
- Female visitors from both U.S. West and U.S. East appeared to be stronger advocates for visiting Kaua'i compared to males from these regions.
- Visitors from U.S. West whose trip was limited to just Kaua'i were stronger advocates for the island compared to travelers from this region whose trip included multiple island stays.

# KAUA'I ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.5%	94.9%	100.0%	97.3%	96.2%	92.3%	100.0%	100.0%
<b>On own (self guided)</b>	88.0%	78.7%	71.9%	84.9%	68.9%	57.8%	0.0%	60.0%
<b>Helicopter/ airplane</b>	8.2%	9.9%	6.2%	7.9%	18.5%	18.1%	0.0%	19.9%
<b>Boat/ submarine/ whale</b>	19.8%	26.0%	0.0%	26.6%	38.9%	30.2%	100.0%	29.8%
<b>Visit towns</b>	55.2%	51.9%	21.9%	60.8%	35.9%	47.4%	100.0%	20.1%
<b>Limo/ van/ bus tour</b>	2.4%	9.4%	6.2%	5.1%	14.1%	14.7%	100.0%	20.1%
<b>Scenic views/ natural landmark</b>	65.8%	68.8%	37.5%	69.0%	60.7%	54.4%	100.0%	60.0%
<b>Movie/ TV/ film location</b>	3.0%	5.3%	9.4%	3.8%	11.7%	3.5%	100.0%	20.2%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



# KAUA'I ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.0%	92.8%	87.6%	95.7%	95.6%	88.0%	100.0%	100.0%
<b>Beach/ sunbathing</b>	84.6%	73.7%	46.9%	84.4%	73.3%	48.3%	0.0%	59.9%
<b>Bodyboard</b>	15.8%	7.1%	18.8%	8.3%	10.7%	3.5%	0.0%	0.0%
<b>Standup paddle board</b>	5.9%	3.3%	0.0%	2.2%	4.4%	0.0%	0.0%	0.0%
<b>Surfing</b>	10.9%	5.6%	0.0%	6.7%	9.2%	3.5%	0.0%	19.9%
<b>Canoeing/ kayak</b>	12.5%	10.7%	9.4%	11.3%	8.7%	3.5%	0.0%	0.0%
<b>Swim ocean</b>	64.7%	51.5%	25.0%	62.9%	54.8%	47.4%	0.0%	20.1%
<b>Snorkel</b>	46.8%	34.0%	18.8%	41.2%	33.0%	41.4%	0.0%	29.8%
<b>Freediving</b>	1.6%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.1%	0.0%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	3.5%	3.6%	0.0%	3.1%	0.0%	0.0%	0.0%	10.1%
<b>Fishing</b>	3.5%	2.7%	9.4%	1.9%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	9.9%	10.5%	28.2%	8.0%	5.8%	0.0%	0.0%	10.1%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.0%	92.8%	87.6%	95.7%	95.6%	88.0%	100.0%	100.0%
<b>Run/ Jog/ Fitness walk</b>	38.8%	30.5%	6.2%	27.2%	8.2%	10.4%	0.0%	20.1%
<b>Spa</b>	6.2%	6.1%	0.0%	3.0%	2.4%	0.0%	0.0%	0.0%
<b>Hiking</b>	55.6%	49.5%	15.6%	52.5%	41.7%	33.6%	0.0%	40.3%
<b>Backpack/Camp</b>	2.6%	3.5%	0.0%	6.1%	1.9%	7.7%	0.0%	0.0%
<b>Agritourism</b>	8.4%	8.5%	9.4%	8.2%	6.8%	11.2%	0.0%	10.1%
<b>Sport event/ tournament</b>	0.4%	0.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	31.3%	37.7%	12.4%	37.5%	33.0%	39.7%	100.0%	20.1%
<b>Waterpark</b>	0.8%	0.5%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	6.3%	3.9%	0.0%	5.7%	4.4%	11.2%	0.0%	9.9%
<b>Zip lining</b>	2.5%	3.2%	0.0%	2.2%	1.9%	6.9%	0.0%	0.0%
<b>Skydiving</b>	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	4.1%	4.7%	0.0%	1.1%	3.8%	0.0%	0.0%	0.0%
<b>Horseback riding</b>	3.1%	2.9%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%

# KAUA'I ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.1%	94.1%	100.0%	95.7%	93.2%	100.0%	100.0%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	14.2%	20.6%	40.5%	19.8%	29.1%	18.9%	0.0%	50.1%
<b>Live music/ stage show</b>	12.0%	17.2%	0.0%	23.0%	21.8%	14.7%	0.0%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	3.4%	5.3%	0.0%	1.9%	3.8%	0.0%	0.0%	0.0%
<b>Fine dining</b>	47.8%	44.1%	9.4%	37.7%	21.8%	15.5%	0.0%	19.9%
<b>Family restaurant</b>	56.0%	49.7%	15.6%	52.5%	42.2%	44.8%	0.0%	0.0%
<b>Fast food</b>	30.0%	29.1%	25.0%	30.2%	22.9%	21.6%	100.0%	50.1%
<b>Food truck</b>	43.8%	39.2%	0.0%	37.3%	22.3%	30.2%	0.0%	19.9%
<b>Café/ coffee house</b>	46.1%	39.4%	31.3%	42.3%	39.3%	50.9%	0.0%	50.1%
<b>Ethnic dining</b>	21.5%	21.9%	6.2%	15.3%	11.7%	18.9%	0.0%	20.1%
<b>Prepared own meal</b>	70.1%	50.3%	43.9%	66.6%	48.0%	39.7%	0.0%	40.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.0%	92.3%	93.8%	93.3%	93.2%	84.5%	100.0%	100.0%
<b>Mall/ department store</b>	22.2%	16.8%	68.7%	30.8%	24.6%	37.1%	0.0%	50.3%
<b>Designer boutique</b>	17.5%	16.0%	9.4%	16.6%	12.6%	10.4%	0.0%	0.0%
<b>Hotel/ resort store</b>	14.4%	17.6%	0.0%	12.0%	16.0%	10.4%	0.0%	0.0%
<b>Swap meet/ flea market</b>	5.4%	6.4%	0.0%	7.8%	3.8%	11.2%	0.0%	0.0%
<b>Discount/ outlet store</b>	12.2%	10.2%	6.2%	12.8%	8.7%	3.5%	0.0%	20.1%
<b>Supermarket</b>	77.4%	58.2%	75.1%	71.2%	69.3%	44.0%	0.0%	49.9%
<b>Farmer's market</b>	41.7%	32.3%	15.6%	46.4%	33.0%	12.0%	0.0%	0.0%
<b>Convenience store</b>	39.4%	38.0%	9.4%	34.1%	30.2%	21.6%	100.0%	49.9%
<b>Duty free store</b>	0.7%	1.2%	15.6%	2.9%	2.4%	0.0%	0.0%	10.1%
<b>Local shop/ artisan</b>	66.4%	68.3%	18.8%	70.2%	71.4%	57.8%	0.0%	20.1%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	42.7%	49.0%	84.4%	57.5%	63.2%	50.9%	100.0%	40.1%
<b>Historic military site</b>	4.6%	4.2%	9.4%	5.6%	7.3%	7.7%	0.0%	0.0%
<b>Other historical site</b>	22.4%	22.9%	43.7%	26.8%	34.0%	17.3%	100.0%	20.1%
<b>Museum/ art gallery</b>	9.2%	8.8%	15.6%	14.2%	8.2%	6.9%	0.0%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	7.1%	16.3%	0.0%	22.3%	25.3%	11.2%	0.0%	9.9%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.0%	2.7%	0.0%	4.3%	1.9%	6.9%	0.0%	0.0%
<b>Play/ concert/ theatre</b>	0.9%	1.7%	9.4%	1.6%	2.4%	4.3%	0.0%	0.0%
<b>Art/ craft fair</b>	8.1%	6.9%	6.2%	14.7%	6.8%	14.7%	0.0%	10.1%
<b>Festival event</b>	5.0%	4.1%	9.4%	3.5%	0.0%	4.3%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.2%	91.3%	100.0%	97.3%	98.1%	92.3%	100.0%	100.0%
<b>Airport shuttle</b>	12.4%	13.1%	0.0%	17.5%	16.6%	14.7%	0.0%	9.9%
<b>Trolley</b>	0.1%	1.0%	15.6%	3.1%	2.4%	3.5%	0.0%	0.0%
<b>Public bus</b>	1.0%	1.2%	6.2%	3.1%	2.4%	3.5%	0.0%	0.0%
<b>Tour bus/ tour van</b>	2.5%	13.3%	18.7%	10.3%	20.9%	25.9%	100.0%	40.1%
<b>Taxi/ limo</b>	4.2%	4.1%	12.4%	6.5%	11.2%	10.4%	0.0%	0.0%
<b>Rental car</b>	87.9%	75.9%	59.5%	86.4%	72.3%	58.6%	0.0%	59.9%
<b>Ride share</b>	3.8%	5.7%	0.0%	4.6%	7.3%	8.6%	0.0%	0.0%
<b>Bicycle rental</b>	3.3%	3.2%	0.0%	3.5%	2.4%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# KAUA'I ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	23.6%	19.7%	31.3%	15.2%	8.7%	10.4%	0.0%	20.1%
<b>Visit friends/ family</b>	22.9%	18.2%	25.0%	12.4%	8.7%	10.4%	0.0%	20.1%
<b>Volunteer non profit</b>	0.9%	1.9%	6.2%	3.9%	0.0%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Fern Grotto</b>	7.2%	10.5%	12.4%	14.3%	9.2%	18.1%	100.0%	0.0%
<b>Hanalei Town</b>	58.7%	49.0%	18.8%	58.5%	40.3%	44.0%	0.0%	0.0%
<b>Hanalei Beach</b>	55.6%	49.8%	9.4%	57.8%	53.4%	47.4%	0.0%	0.0%
<b>Kalalau Trail</b>	18.2%	20.1%	0.0%	24.5%	15.5%	7.7%	0.0%	20.1%
<b>Kalapaki Beach</b>	28.5%	26.7%	0.0%	32.5%	28.3%	22.4%	0.0%	30.2%
<b>Bike Path in Kapa‘a</b>	10.7%	8.4%	0.0%	14.2%	10.7%	0.0%	0.0%	0.0%
<b>Kaua‘i Museum</b>	2.4%	2.6%	9.4%	4.3%	4.4%	0.0%	0.0%	0.0%
<b>Ke‘e Beach</b>	19.1%	16.5%	6.2%	20.2%	8.7%	4.3%	0.0%	0.0%
<b>Kilauea Lighthouse</b>	30.6%	31.4%	9.4%	39.5%	24.3%	29.3%	0.0%	10.1%
<b>Koke‘e</b>	12.4%	11.0%	0.0%	13.8%	13.1%	11.2%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Koke'e Museum</b>	2.4%	2.6%	0.0%	4.9%	6.3%	0.0%	0.0%	0.0%
<b>Na Aina Kai Gardens</b>	2.2%	2.8%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
<b>Napali Coast</b>	38.4%	46.8%	6.2%	46.6%	58.3%	47.4%	0.0%	39.8%
<b>Allerton Garden</b>	8.2%	8.8%	6.2%	8.2%	6.8%	0.0%	0.0%	9.9%
<b>Limahuli Garden</b>	6.1%	6.5%	0.0%	6.1%	3.8%	3.5%	0.0%	0.0%
<b>Old Koloa Town</b>	40.2%	29.6%	28.2%	37.0%	15.0%	22.4%	100.0%	0.0%
<b>Opaeka'a Falls</b>	26.9%	29.8%	0.0%	33.7%	42.4%	30.2%	100.0%	20.2%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

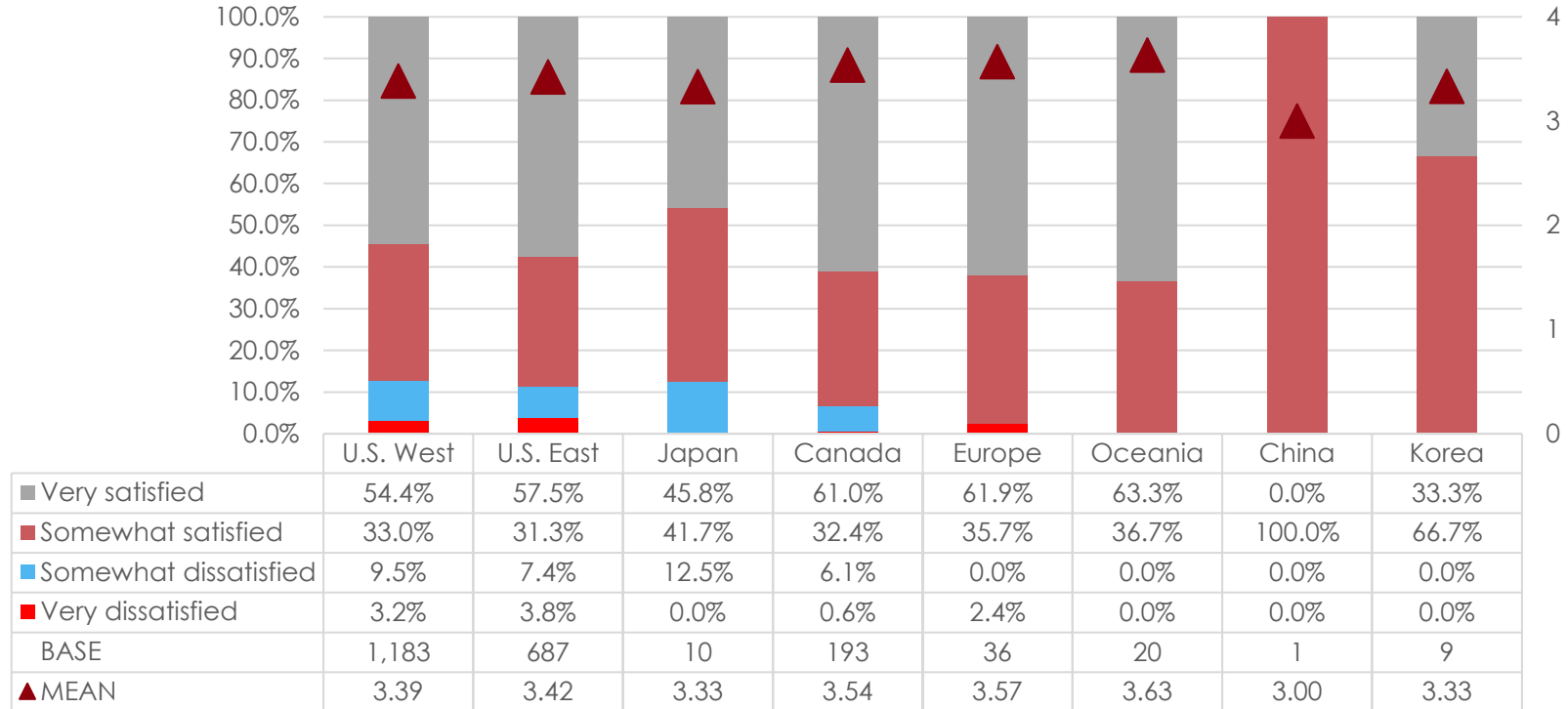
## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Po‘ipu Beach</b>	71.2%	55.9%	43.9%	69.5%	42.2%	39.7%	0.0%	40.0%
<b>Smith’s Tropical Paradise Gardens</b>	3.8%	5.2%	0.0%	5.5%	6.3%	3.5%	0.0%	0.0%
<b>Spouting Horn</b>	40.4%	33.7%	0.0%	42.8%	24.3%	24.1%	100.0%	20.1%
<b>Wailua Falls</b>	39.6%	45.3%	9.4%	47.9%	55.8%	41.4%	100.0%	70.0%
<b>Wailua River</b>	22.9%	21.2%	9.4%	25.2%	35.9%	21.6%	100.0%	9.9%
<b>Waimea Canyon</b>	54.5%	59.6%	28.1%	61.1%	67.2%	55.2%	100.0%	70.2%
<b>Disc Golf</b>	0.7%	0.3%	0.0%	0.4%	1.9%	0.0%	0.0%	0.0%
<b>Mini Golf</b>	2.5%	1.5%	0.0%	1.5%	1.9%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

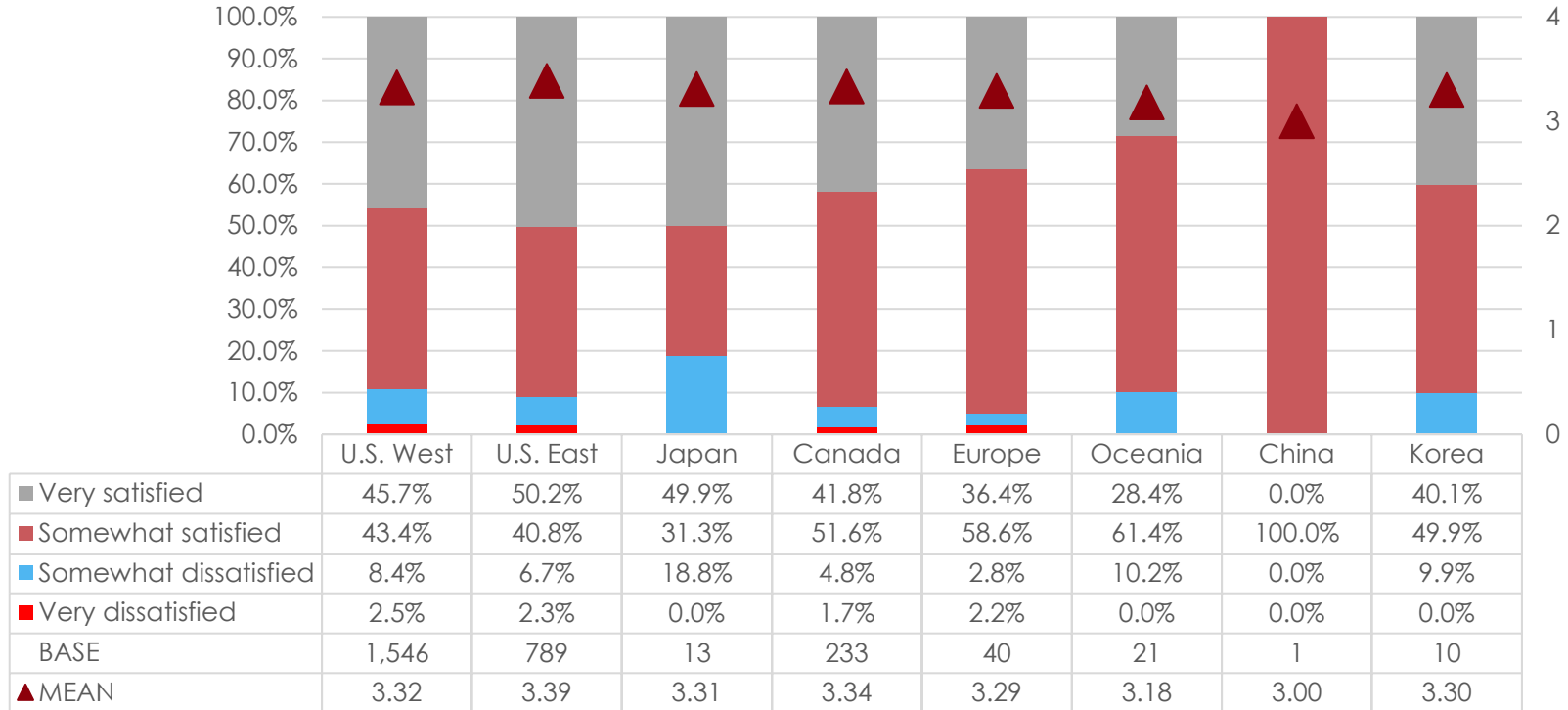
# SATISFACTION – ENTERTAINMENT

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



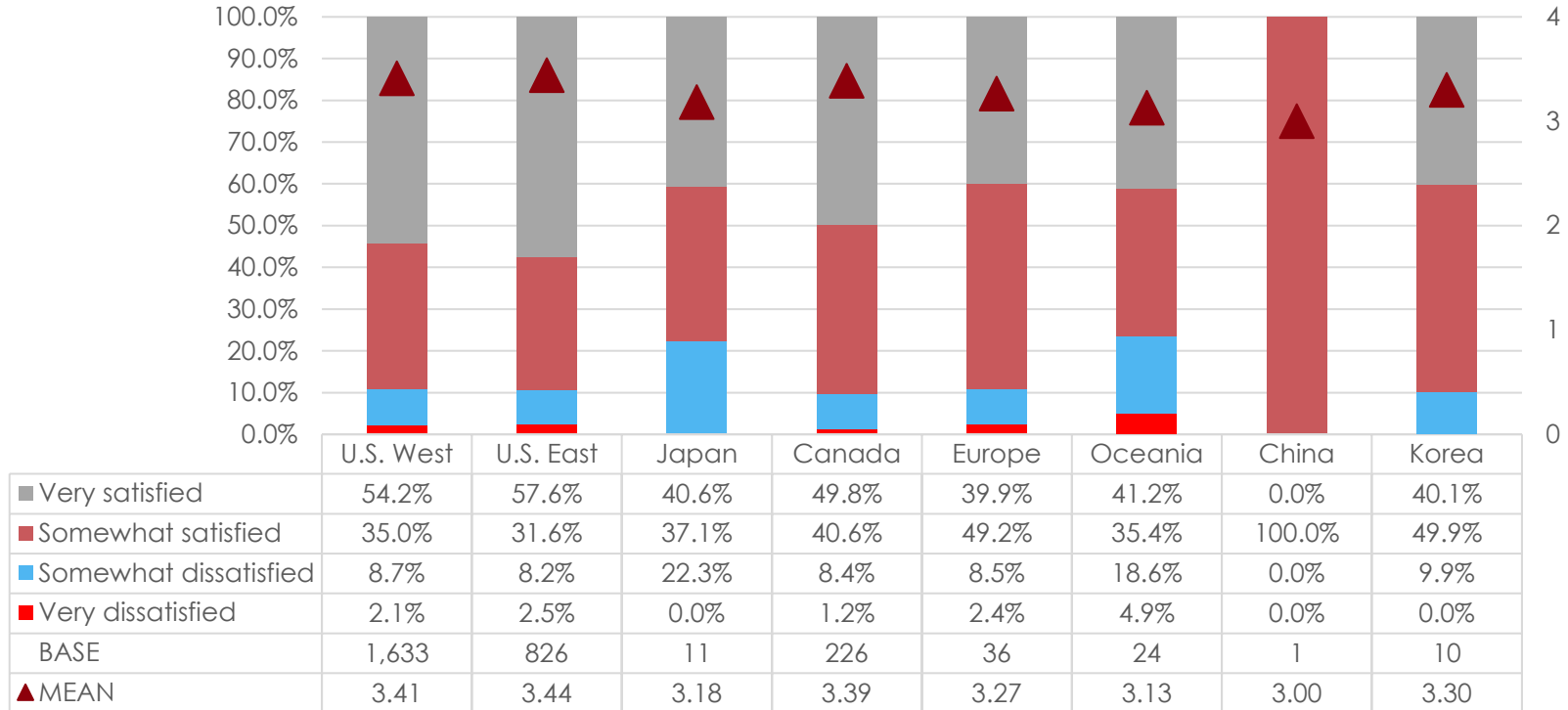
# SATISFACTION – SHOPPING

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



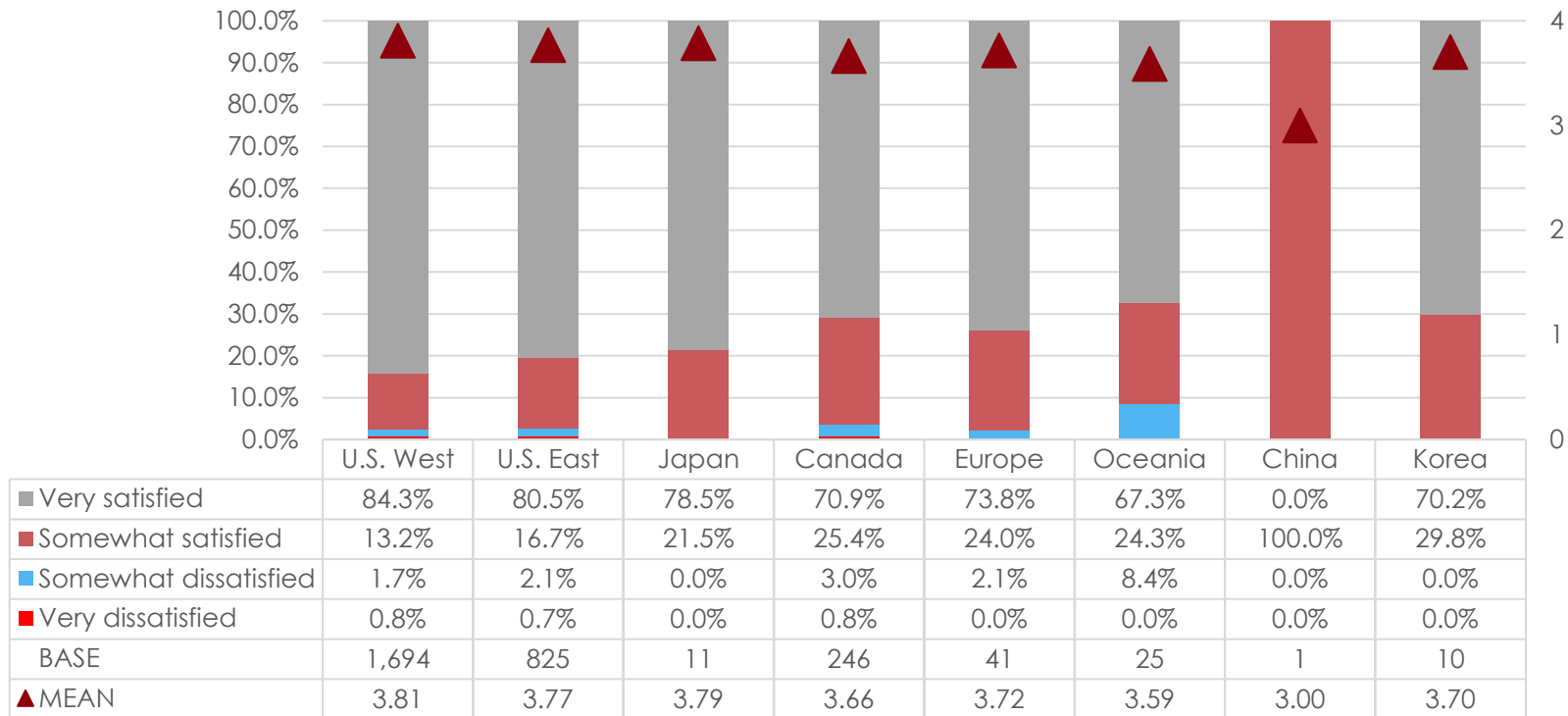
# SATISFACTION – DINING

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



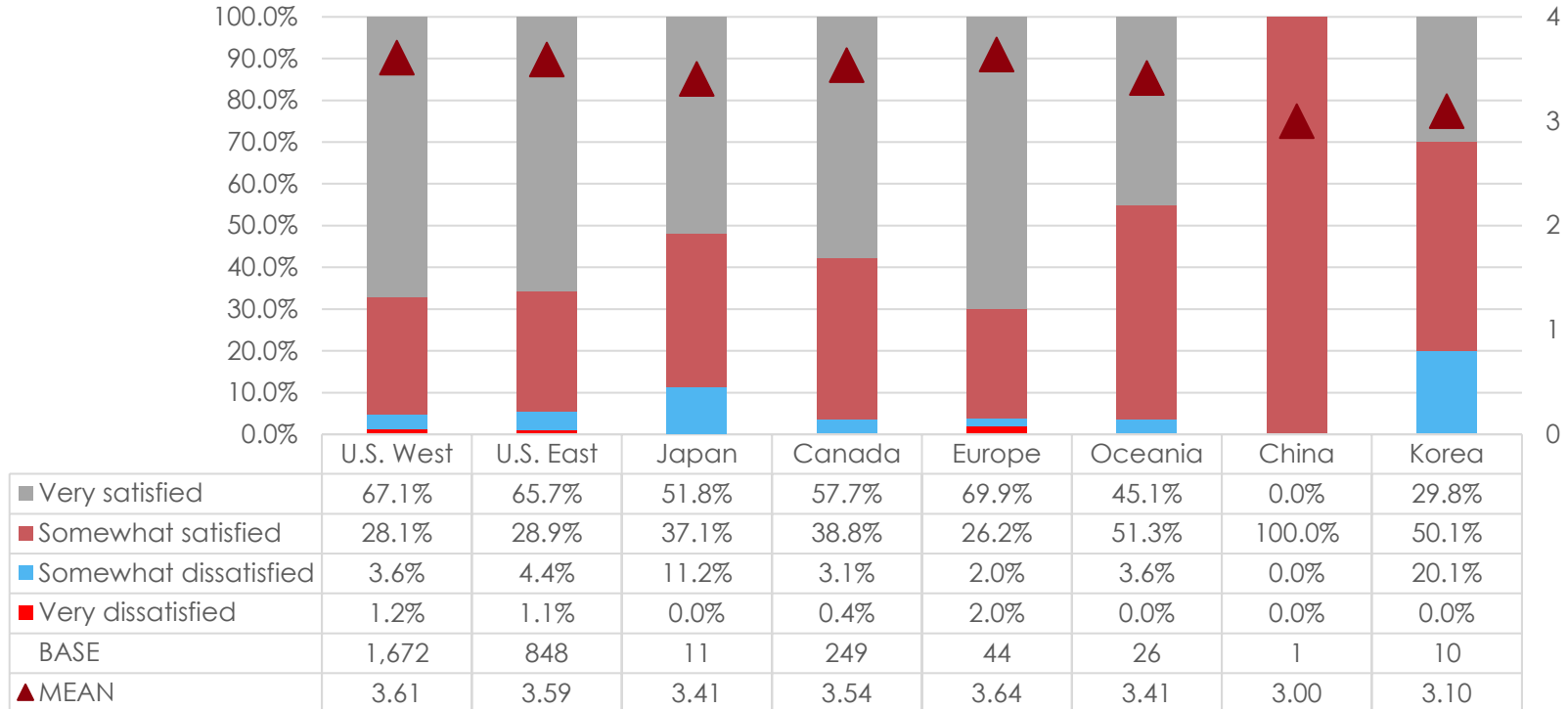
# SATISFACTION – BEACHES

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



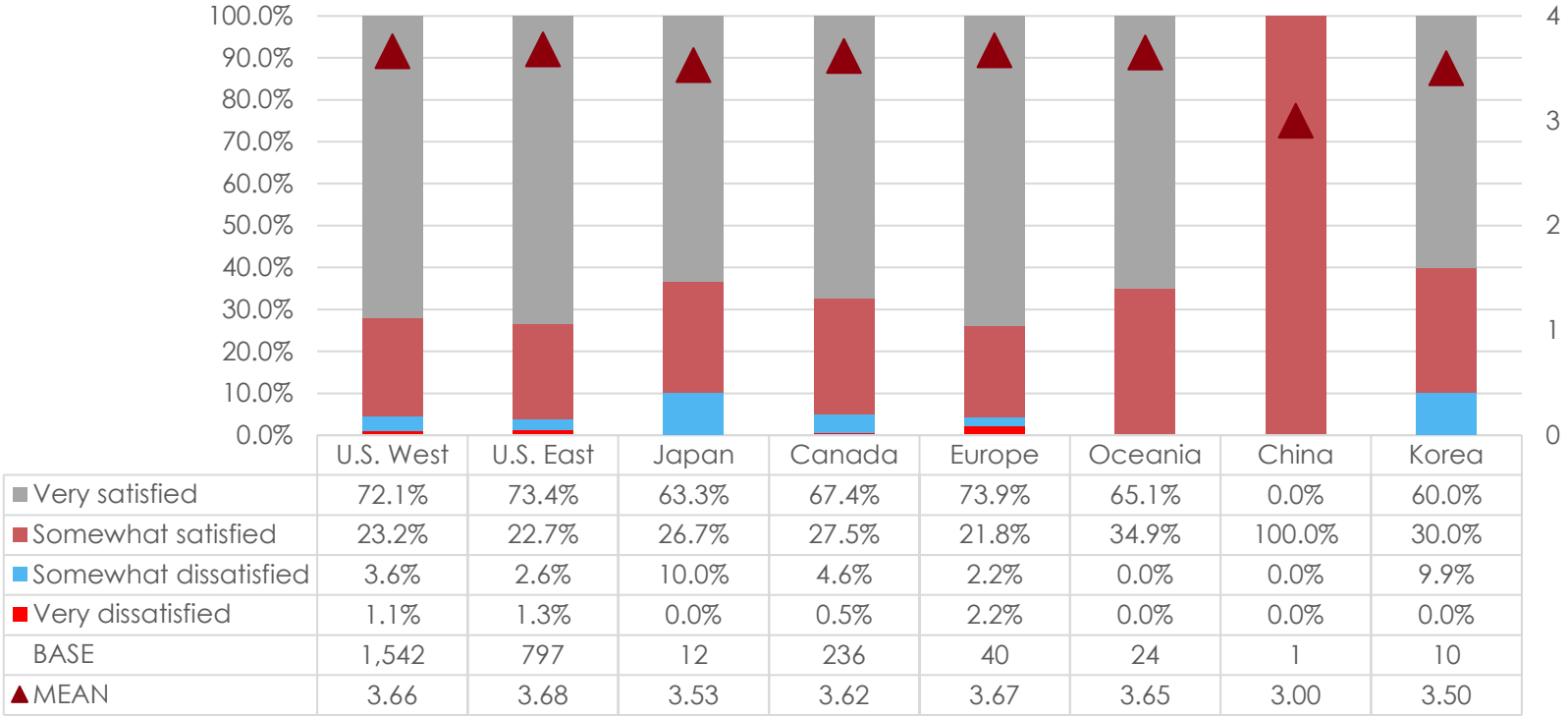
# SATISFACTION – PUBLIC AREAS

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



# SATISFACTION – PARKS

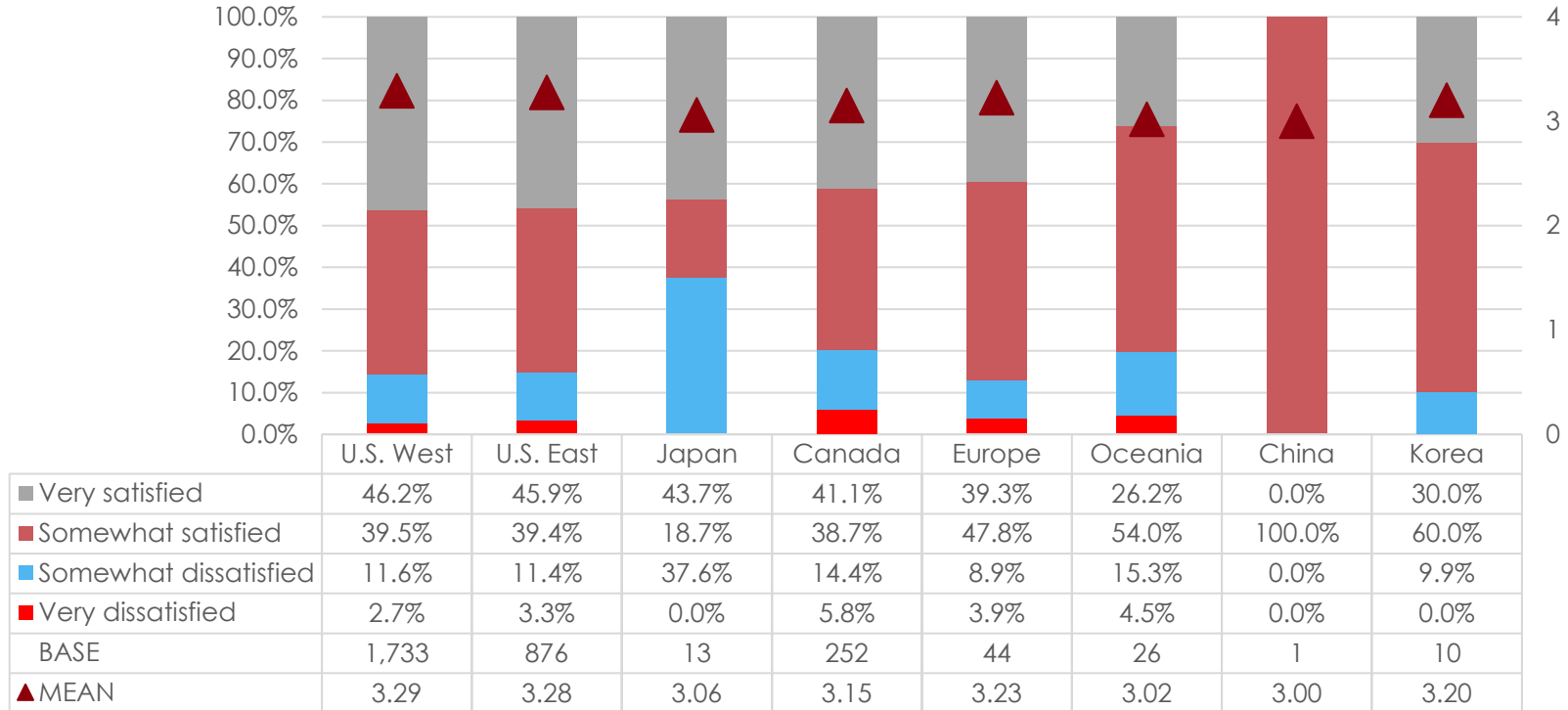
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied





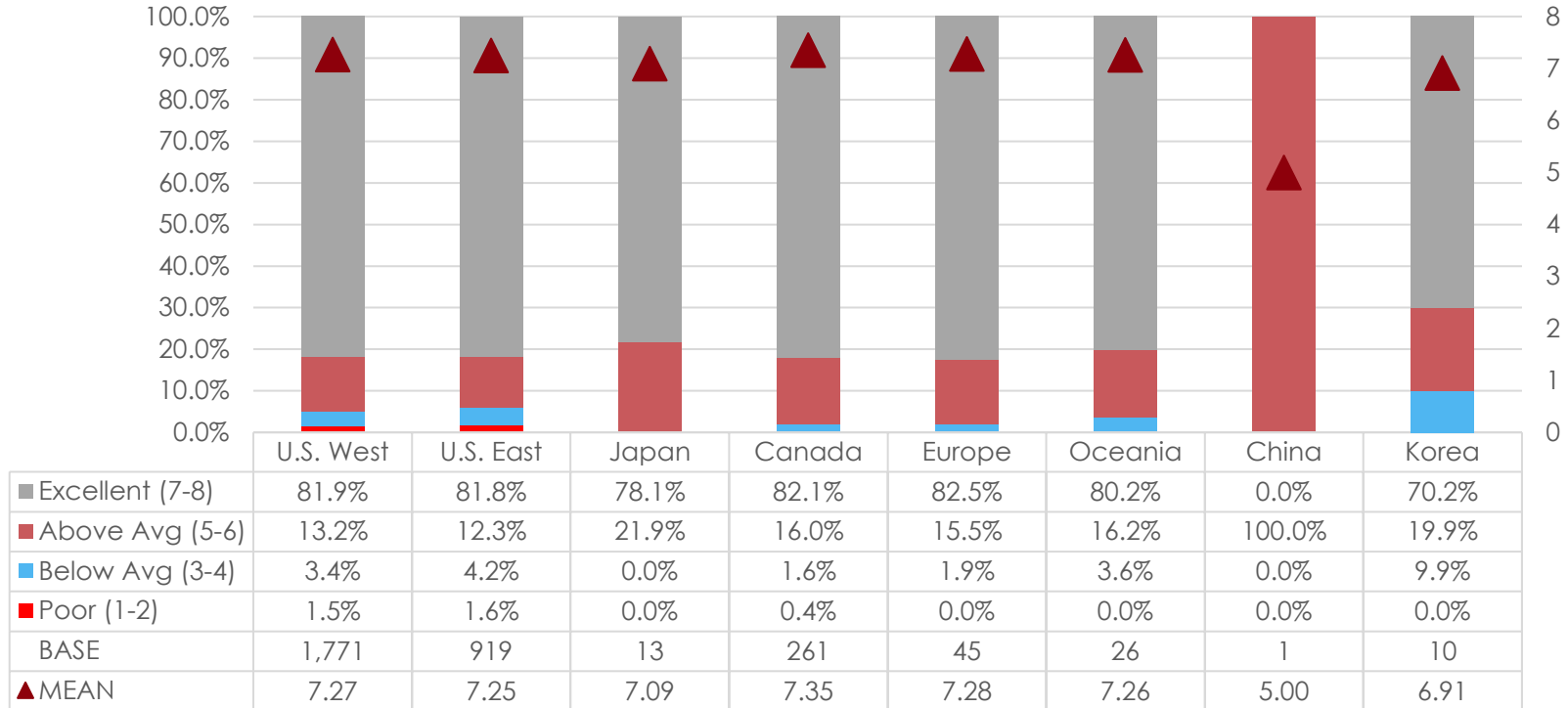
# SATISFACTION – ROADS

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



# FRIENDLINESS OF KAUA'I RESIDENTS

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

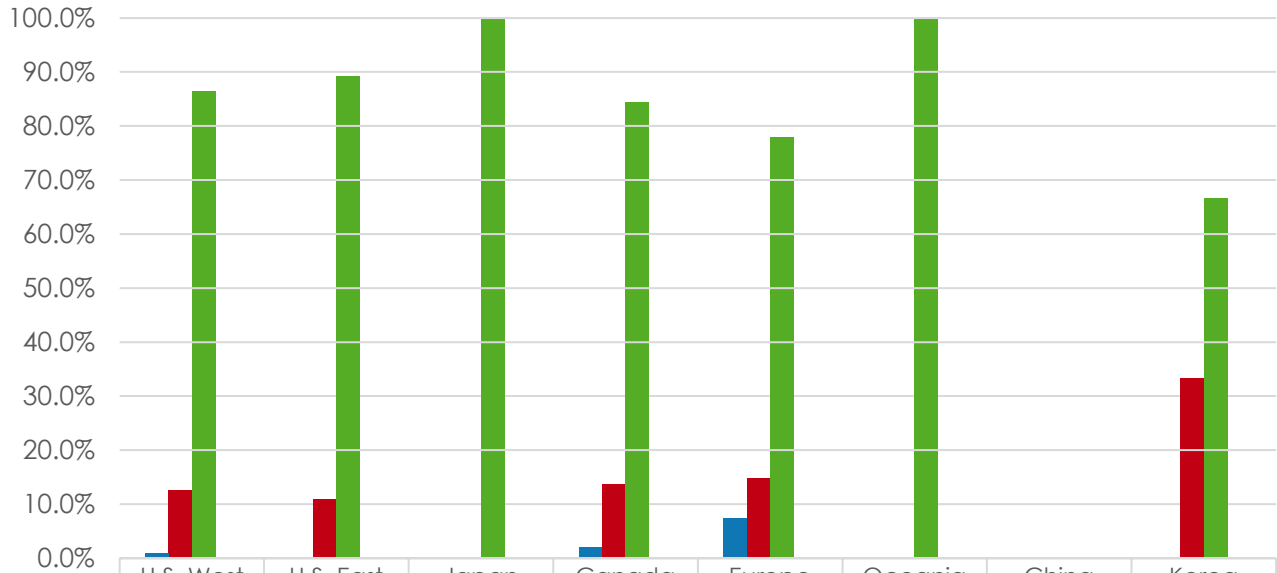


## TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	49.1%	30.0%	37.6%	30.0%	19.7%	14.4%	0.0%	0.0%
Friend recommendation	25.6%	28.8%	37.5%	32.7%	32.4%	31.5%	0.0%	30.0%
Cruise line stop	1.0%	10.9%	18.7%	8.1%	17.0%	31.5%	0.0%	0.0%
Visiting Family/ Friends	5.0%	5.0%	0.0%	2.8%	2.0%	0.0%	0.0%	0.0%
Article/ Blog	2.4%	3.5%	0.0%	5.9%	5.0%	3.6%	0.0%	20.1%
Own a timeshare	2.6%	1.6%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%
Location/ Never been, but went to other islands	2.0%	2.4%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%
Travel agent	0.5%	2.3%	6.2%	2.3%	13.9%	10.8%	0.0%	19.9%
Social media post	0.9%	1.7%	0.0%	1.0%	2.5%	3.6%	100.0%	30.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other Response	1.0%	0.0%	0.0%	2.0%	7.4%	0.0%		0.0%
Full-face snorkel mask	12.6%	10.9%	0.0%	13.7%	14.8%	0.0%		33.3%
2-Piece, separate mask & snorkel	86.4%	89.1%	100.0%	84.3%	77.8%	100.0%		66.7%
BASE	829	312	2	108	15	11	0	3

# SNORKELING EQUIPMENT USED – KAUA‘I

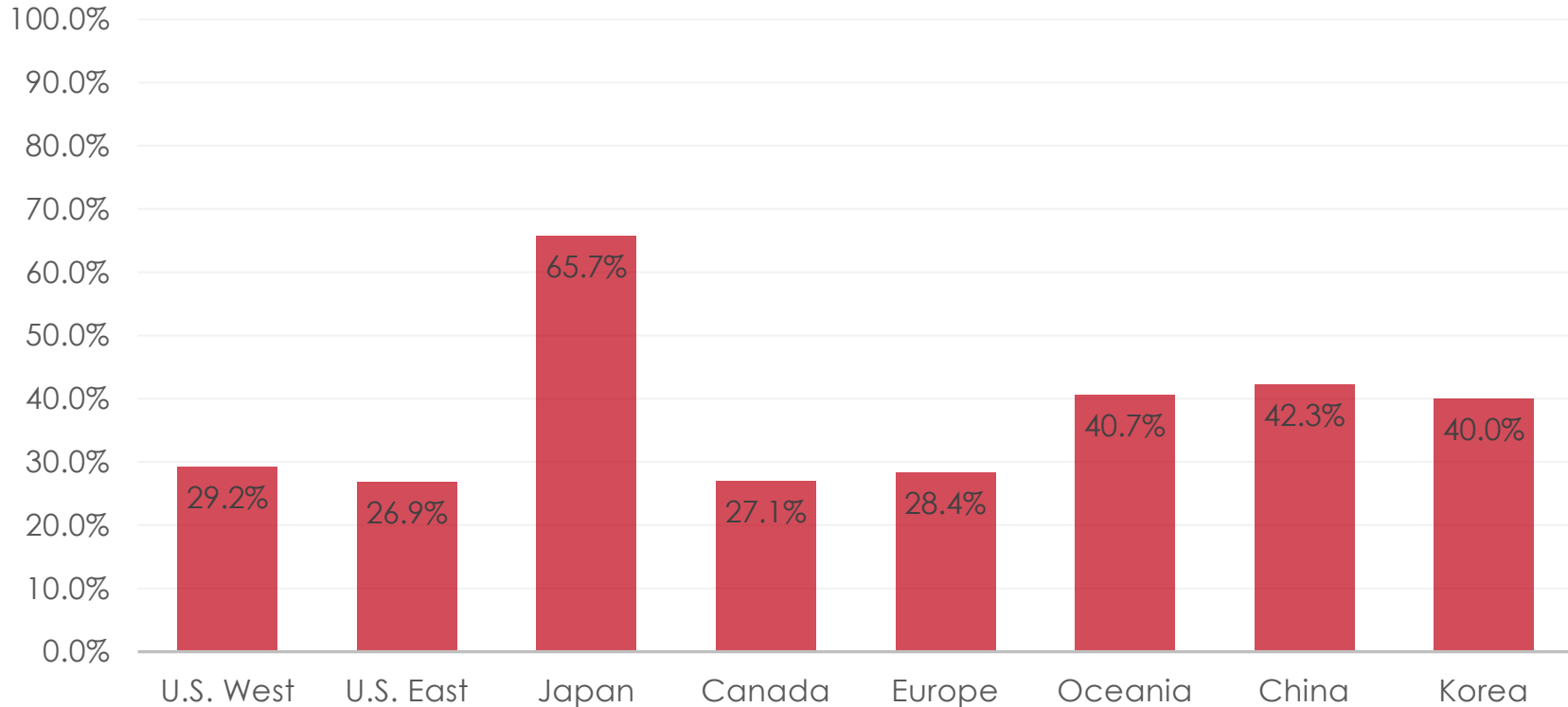
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	98.0%	98.4%	100.0%	98.0%	100.0%	100.0%	0.0%	100.0%
Yes, while using a 2 piece mask & snorkel	0.9%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while using a full face snorkel mask	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.8%	0.3%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – ISLAND OF HAWAI‘I

# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I



487 Q. Do you remember seeing or hearing advertising for the island of Hawai'i Island prior to your arrival?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

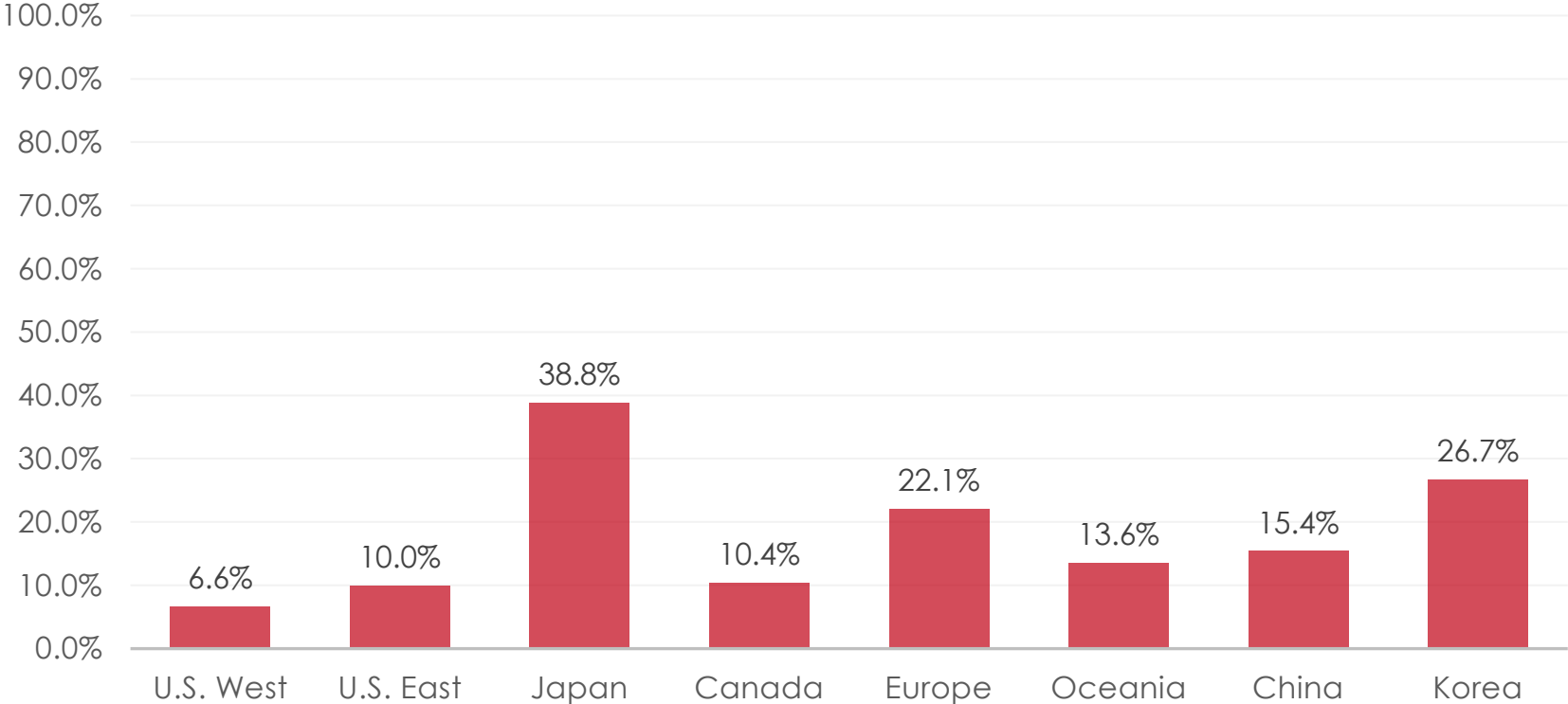


# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I

- Aided advertising awareness for the Island of Hawai'i was higher among visitors from U.S. East, Japan, and Canada over the age of 50. Similarly, seniors from U.S. West were the most likely to be exposed to advertising prior to arrival.
- Visitors from Japan without a college degree were more likely to be exposed to advertising from Hawai'i Island.
- U.S. East travelers whose stay included visits to multiple islands during their stay were more likely to have seen or heard advertising for Hawai'i Island compared to those whose trip was limited to just Hawai'i Island.
- Repeat visitors to Hawaii were more likely to have been exposed to marketing for Hawaii Island than first-time visitors from the following markets: U.S. West, Japan, Canada, and Oceania.



# IMPACT OF LOCATION FILMING— ISLAND OF HAWAI'I

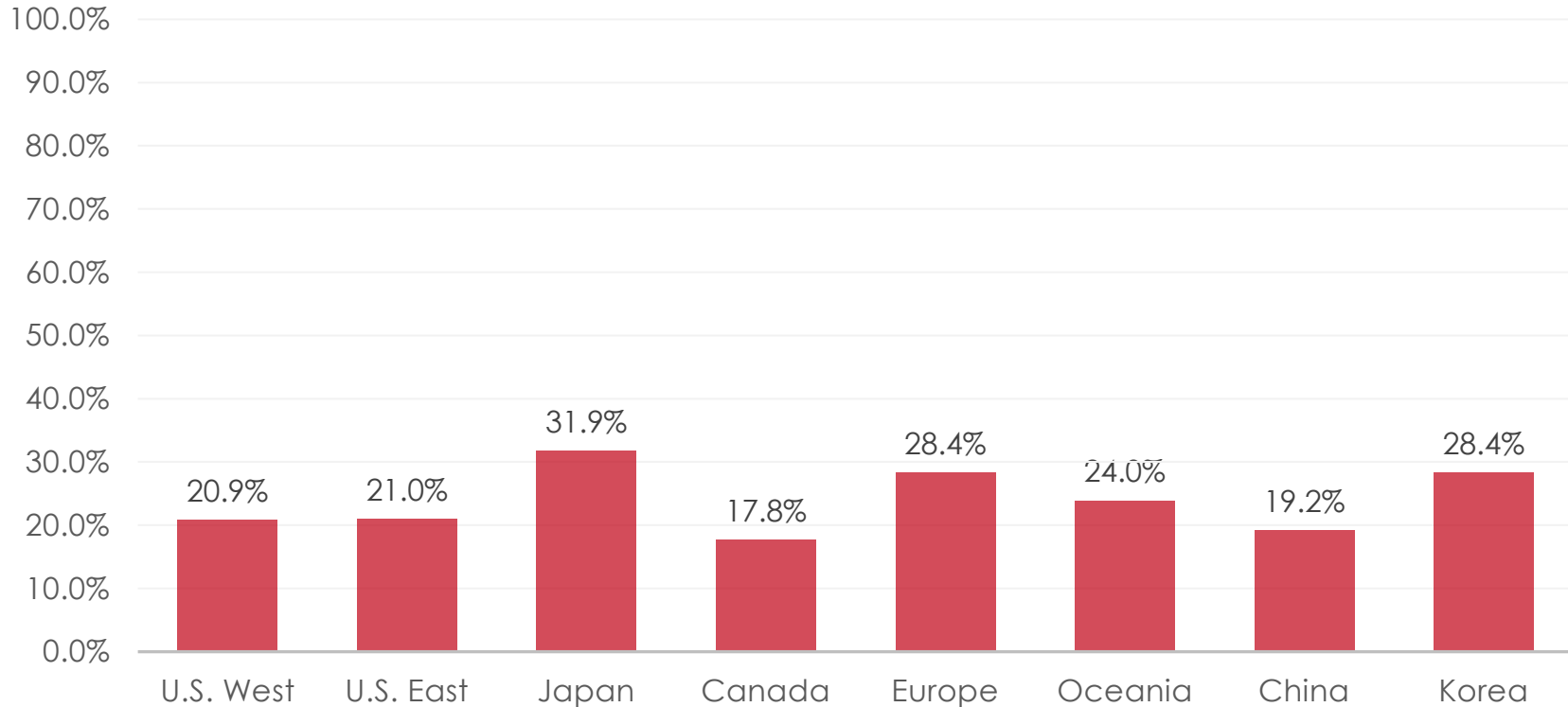


489 Q. Which of the following, if any, motivated you to visit the Island of Hawai'i?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# IMPACT OF OUTDOOR/ SPORTING EVENT – ISLAND OF HAWAI'I

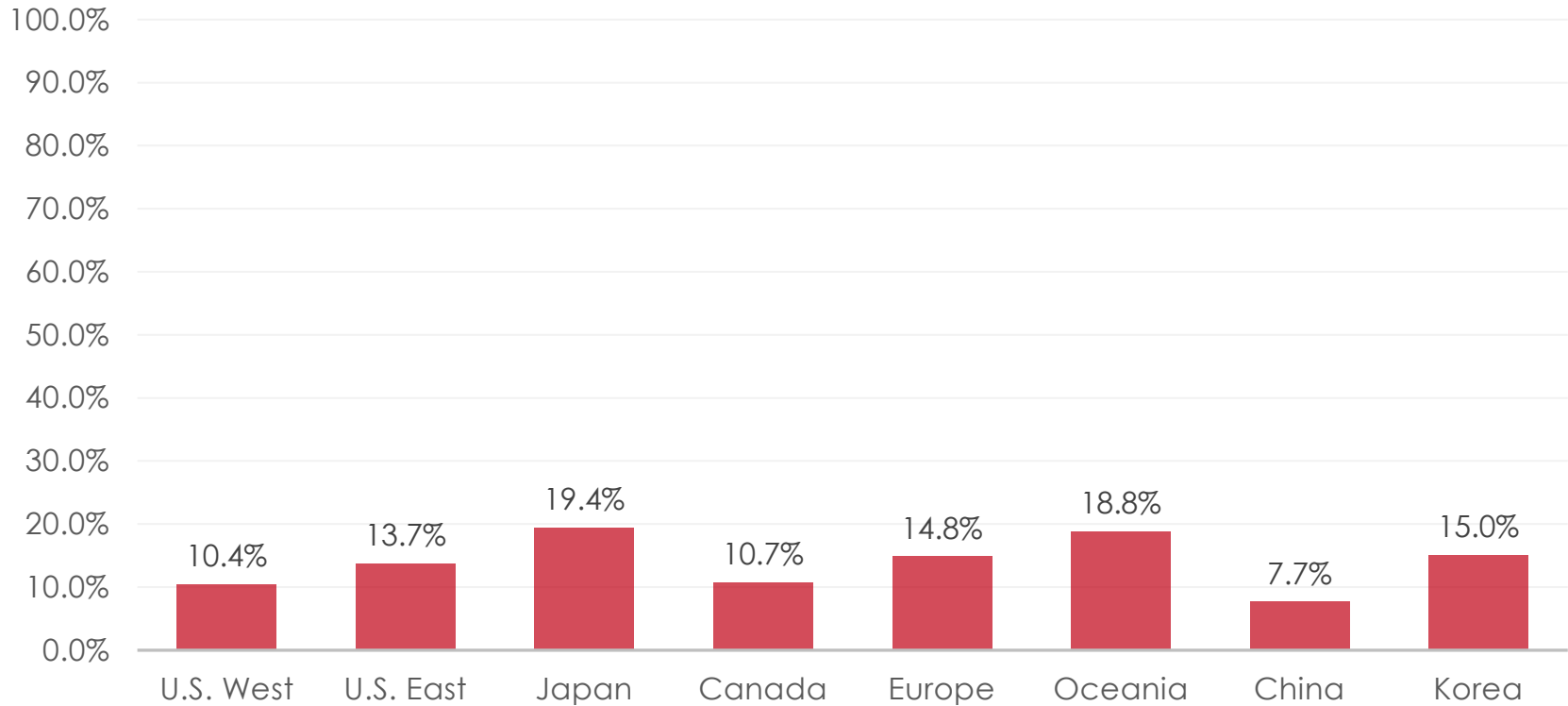


490 Q. Which of the following, if any, motivated you to visit the Island of Hawai'i?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# IMPACT OF HAWAIIAN CULTURAL EVENT – ISLAND OF HAWAI‘I

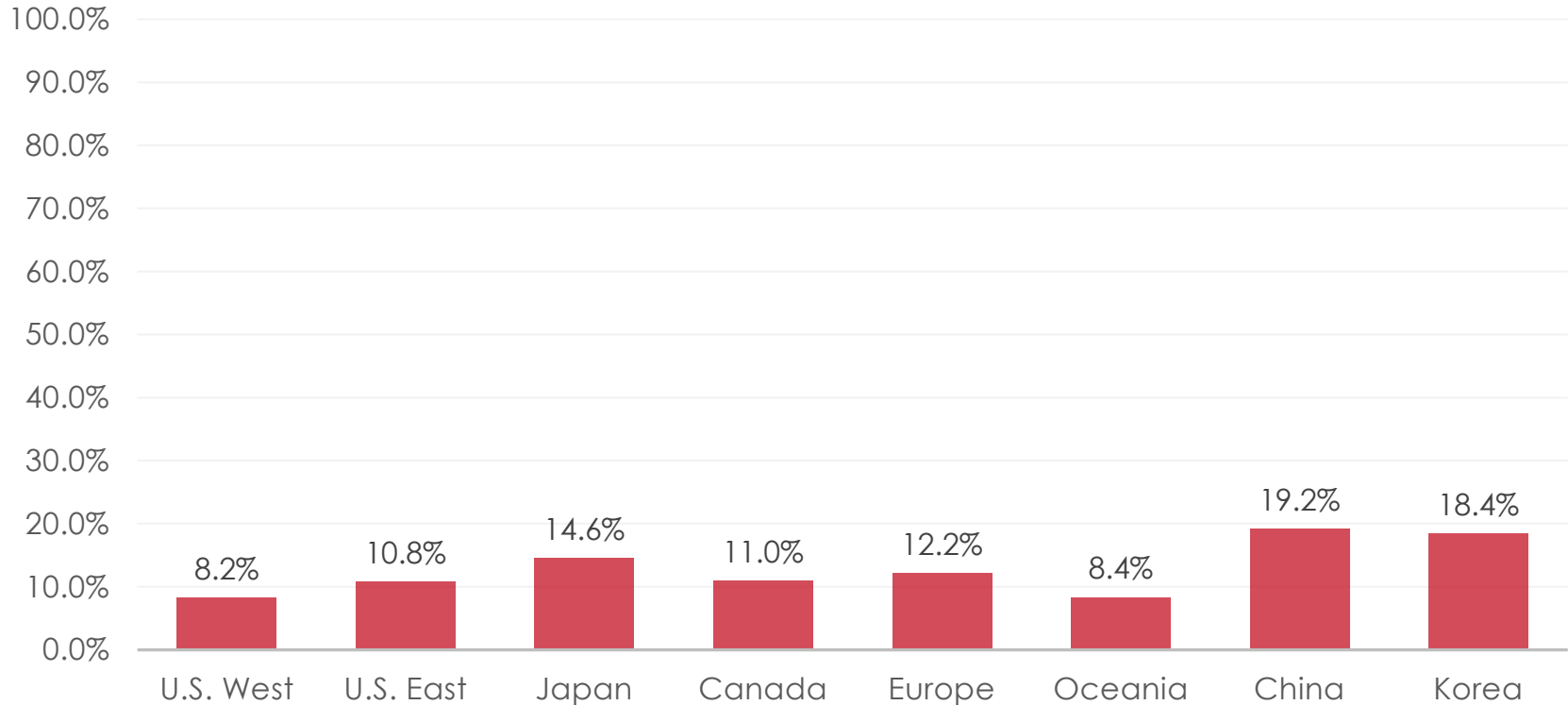


Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

491 Q. Which of the following, if any, motivated you to visit the Island of Hawai'i?



# IMPACT OF SOCIAL MEDIA POST/ VIDEO – ISLAND OF HAWAI'I

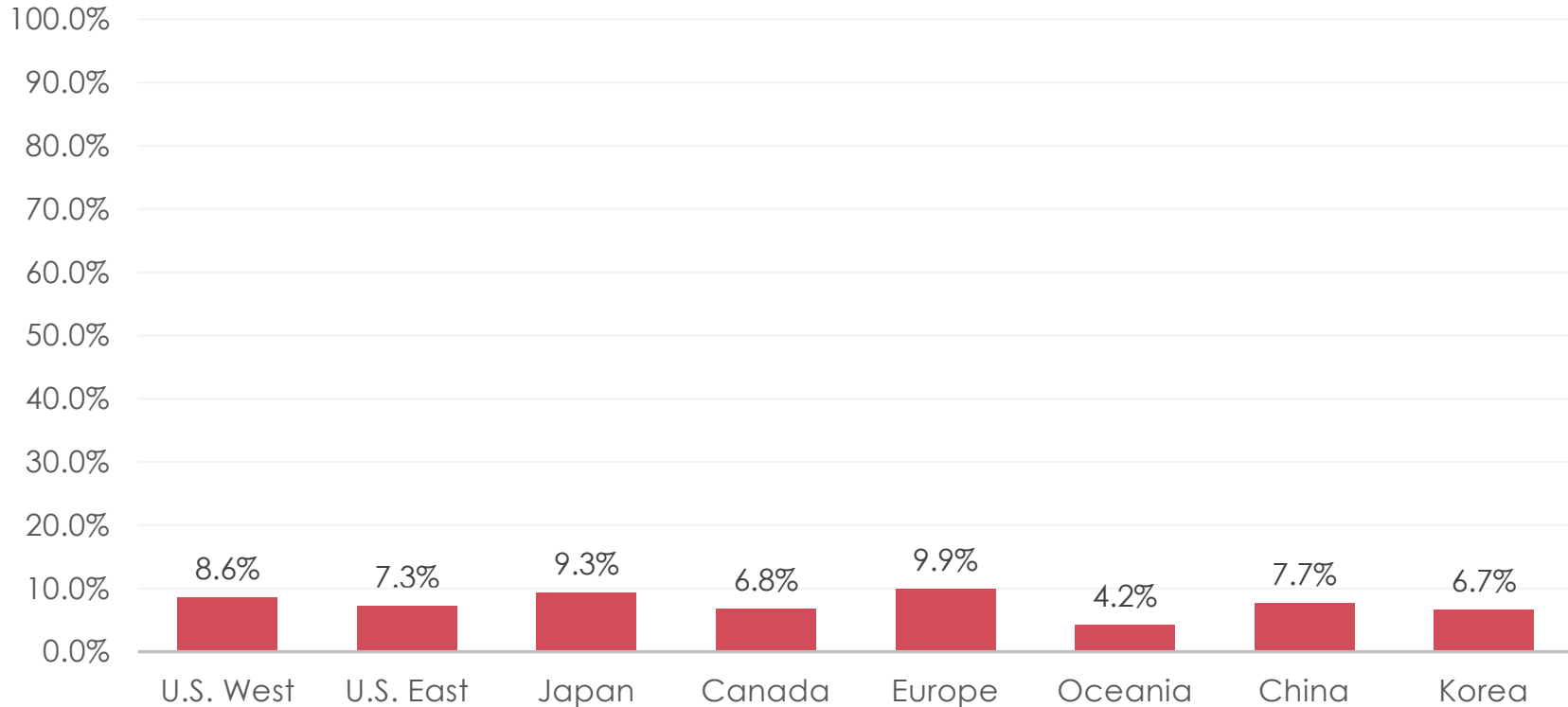


492 Q. Which of the following, if any, motivated you to visit the Island of Hawaii?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# IMPACT OF HAWAIIAN MUSIC– ISLAND OF HAWAI‘I

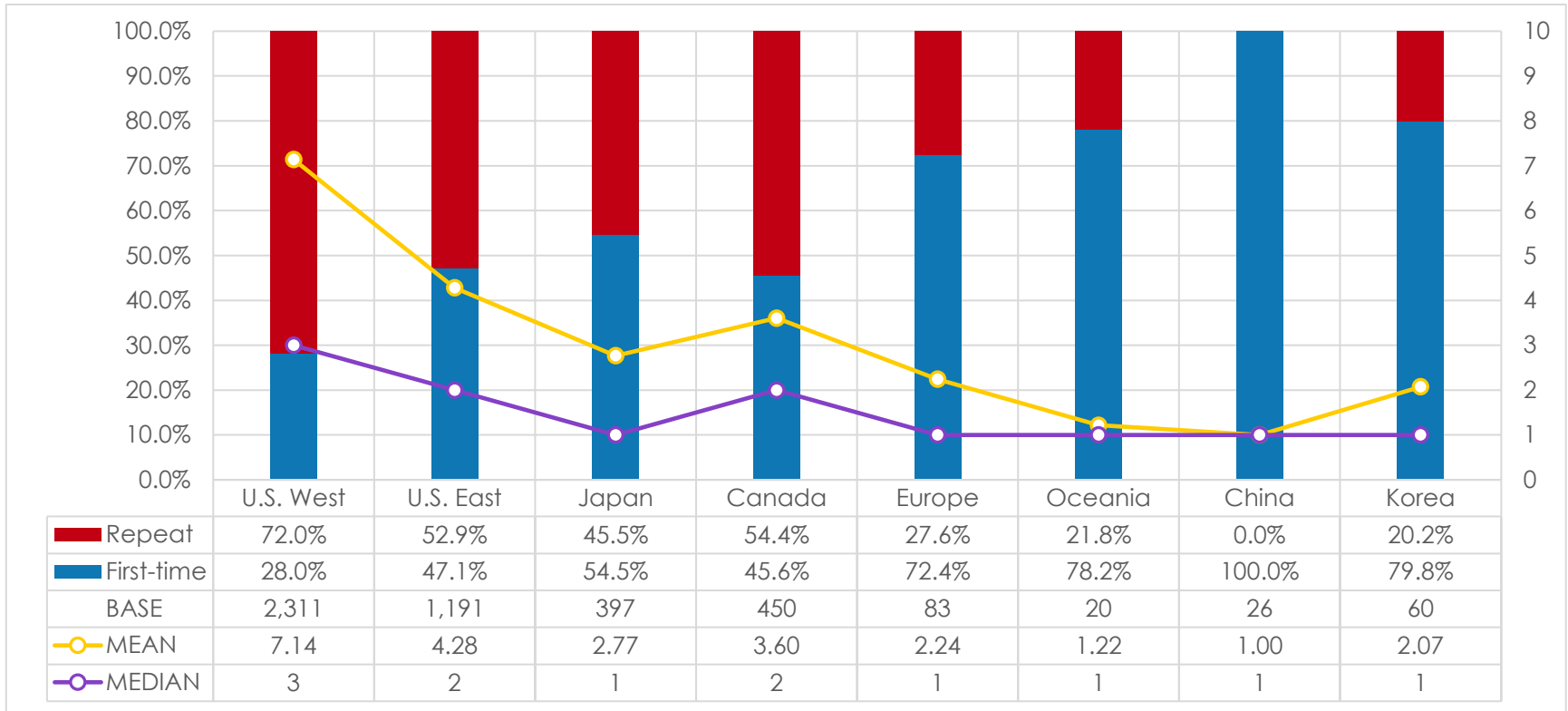


493 Q. Which of the following, if any, motivated you to visit the Island of Hawai'i?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – ISLAND OF HAWAI'I



# 1<sup>ST</sup> TIME VS REPEAT VISITOR – ISLAND OF HAWAI'I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- More affluent visitors from U.S. West have traveled to Hawai'i Island more often than less affluent visitors from this segment.
- Visitors from U.S. East, Korea, and Canada whose trip was limited to visiting just Hawaii Island have traveled here more often compared to those who visited multiple islands during their trip.
- Those who are traveling in larger travel parties from U.S. West, U.S. East, and Japan have visited Hawai'i Island more often in the past.

# ACCOMMODATIONS – ISLAND OF HAWAI‘I

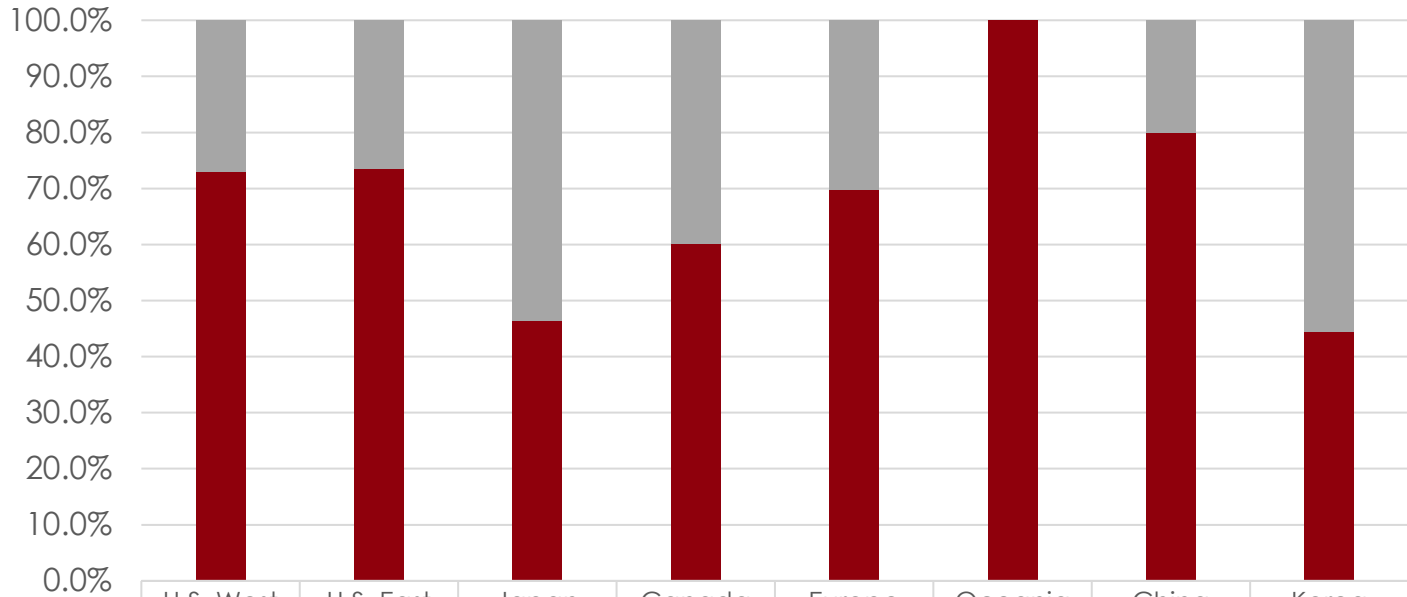
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hotel/ resort/ villa	32.8%	42.5%	78.5%	37.1%	54.3%	50.0%	61.6%	88.3%
Vacation rental (includes Airbnb, VRBO, etc.)	26.9%	24.8%	2.5%	40.1%	20.7%	10.8%	15.5%	13.4%
Stayed with friends or relatives	19.3%	15.1%	2.3%	7.9%	6.8%	5.4%	3.8%	3.3%
Condominium	17.4%	10.9%	8.4%	17.0%	11.0%	8.7%	11.6%	3.3%
Timeshare Unit	12.2%	13.8%	6.3%	13.6%	2.1%	16.3%	3.9%	0.0%
Private Room in Private Home	6.2%	5.4%	0.5%	3.3%	7.6%	0.0%	7.7%	1.7%
Rental House	5.6%	4.7%	0.7%	6.8%	8.7%	0.0%	0.0%	0.0%
Own property/ 2nd home	5.8%	1.4%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Bed & Breakfast	1.7%	2.8%	0.5%	3.9%	7.1%	0.0%	15.4%	0.0%
Day trip/ Did not stay overnight	0.7%	2.3%	3.8%	0.2%	2.6%	4.4%	3.8%	10.0%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# ACCOMMODATIONS - ISLAND OF HAWAI'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Visitor area	27.0%	26.4%	53.7%	39.9%	30.3%	0.0%	20.1%	55.6%
Residential Neighborhood	73.0%	73.6%	46.3%	60.1%	69.7%	100.0%	79.9%	44.4%
BASE	861	409	15	217	29	2	5	9

# ACCOMMODATIONS - ISLAND OF HAWAI'I

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	32.3%	31.5%	51.3%	27.5%	22.6%	0.0%	20.1%	0.0%
Price/ value/ best deal	17.5%	20.5%	12.2%	29.0%	14.4%	50.0%	0.0%	55.8%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	18.2%	17.8%	36.5%	20.7%	19.6%	0.0%	39.9%	33.1%
Owned by self, friend or relative	16.9%	15.9%	0.0%	5.6%	3.8%	0.0%	0.0%	11.0%
Ability to have travel party members stay together	5.8%	5.4%	0.0%	7.7%	17.4%	0.0%	19.8%	0.0%
Recommended friends/ family	3.9%	3.2%	0.0%	5.1%	3.8%	0.0%	0.0%	0.0%
Availability	2.3%	2.4%	0.0%	2.3%	18.2%	50.0%	20.1%	0.0%
No choice/ part of pkg	1.4%	1.9%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	24.3%	32.1%	45.0%	30.2%	47.3%	39.2%	50.1%	40.0%
Beach/ ocean	22.1%	14.2%	10.2%	14.9%	5.8%	4.4%	7.7%	8.3%
Variety of activities/ attractions/ many choices	13.4%	17.0%	19.1%	20.7%	17.6%	13.1%	26.8%	20.0%
Feeling of the "Aloha Spirit"	9.7%	9.9%	2.8%	12.0%	10.8%	0.0%	0.0%	5.0%
Overall customer service/ hospitality/ the people	6.4%	4.2%	3.2%	4.3%	1.3%	10.8%	3.8%	10.0%
Events/ celebrations with friends/ family	6.3%	7.1%	1.4%	1.4%	1.3%	5.4%	0.0%	0.0%
Local culture/ people/ music	4.0%	3.9%	1.5%	4.9%	5.0%	5.4%	0.0%	0.0%
Accommodations/ was as promised	2.6%	1.5%	4.8%	2.3%	2.1%	5.4%	0.0%	0.0%
Food/ restaurant variety/ dining options	2.1%	2.7%	0.5%	0.6%	0.0%	5.4%	0.0%	3.3%
Feeling safe (able to walk at night)	0.8%	0.6%	1.0%	2.9%	1.3%	5.4%	3.9%	1.7%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# STRENGTHS/ POSITIVE ASPECTS – ISLAND OF HAWAI'I

- Males from U.S. West were more likely to single out the variety of activities and attractions on the island while females from this market mention the Aloha Spirit in larger numbers.
- Younger travelers under the age of 35 from U.S. West were more likely to identify the island's natural beauty as the primary strength of their stay.
- College graduates from U.S. West were more impressed with the natural beauty of the island and the variety of activities and attractions. Those without a college degree were more likely to be impressed with the level of customer service they experienced.
- More affluent visitors from U.S. West were more likely to name the variety of attractions and activities, the accommodations, and feeling safe as strengths of the island.

# AREAS OF OPPORTUNITIES – ISLAND OF HAWAI‘I

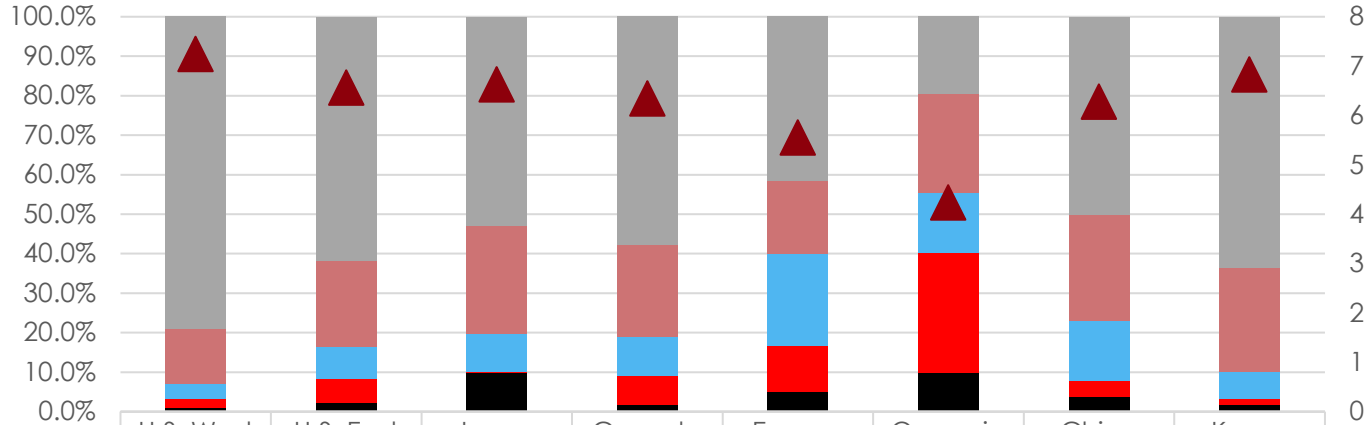
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	44.6%	44.9%	31.0%	46.6%	47.8%	28.3%	46.2%	26.7%
Food/ restaurant variety/ dining options	8.7%	7.1%	11.0%	3.9%	3.4%	4.4%	19.3%	15.0%
COVID 19	10.6%	8.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Would like to experience more local culture	6.6%	9.0%	4.5%	6.5%	7.4%	10.8%	3.8%	10.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	1.8%	2.4%	27.4%	2.6%	7.1%	5.4%	0.0%	6.6%
Traffic (congested/slow)	5.6%	3.7%	1.3%	10.4%	7.4%	0.0%	0.0%	5.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	3.6%	4.0%	2.2%	5.3%	3.7%	10.8%	3.8%	0.0%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	3.2%	2.9%	2.8%	5.4%	1.0%	4.4%	0.0%	5.0%
Food/ restaurant quality	2.4%	2.4%	5.8%	3.0%	3.4%	5.4%	7.7%	8.4%

# AREAS OF OPPORTUNITIES – ISLAND OF HAWAI‘I

- Males from U.S. East were more likely to complain about traffic and food quality compared to female visitors from this market.
- Japanese females more so than males complained about the lack of ground transportation on island. Japanese males on the other hand were more likely to lament their rental car experience and the quality of food on island.
- Younger travelers from U.S. West and U.S. East under the age of 35 lament their lack of exposure to local culture during their trip. Conversely, issues and fears related to the pandemic were more on the mind's of older travelers from these regions.
- More affluent travelers from U.S. West complained more about the quality of food on their trip. Conversely, the lack of ground transportation is more of an issue for less affluent travelers from U.S. West.
- First-time visitors from both U.S. West and U.S. East indicate their trip would have been improved if there was more exposure to local culture.

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	79.1%	61.6%	52.8%	57.8%	41.6%	19.6%	50.1%	63.4%
■ Somewhat likely (5-6)	13.7%	22.0%	27.5%	23.2%	18.4%	25.0%	26.9%	26.6%
■ Somewhat unlikely (3-4)	3.9%	7.9%	9.5%	9.8%	23.4%	15.2%	15.4%	6.6%
■ Very unlikely (1-2)	2.5%	6.3%	0.3%	7.4%	11.6%	30.4%	3.8%	1.7%
■ Not sure	0.8%	2.2%	9.8%	1.8%	5.0%	9.8%	3.8%	1.7%
BASE	2,307	1,190	397	448	83	20	26	60
▲ MEAN	7.25	6.57	6.63	6.35	5.56	4.24	6.28	6.83

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Among travelers from U.S. West, young adults under the age of 35 were the least likely to return in the next five years. Travelers from Canada over the age of 50 were more likely to return in this five year time period than younger travelers from this market.
- Those travelers from U.S. West, U.S. East, and Canada whose trip consisted visiting Hawaii Island exclusively were more likely to return in the next five years than those who visited multiple islands during their stay.
- Those who traveled alone on this recent trip from U.S. West and U.S. East were more likely to return in the next five years compared to those who arrived in larger travel parties.

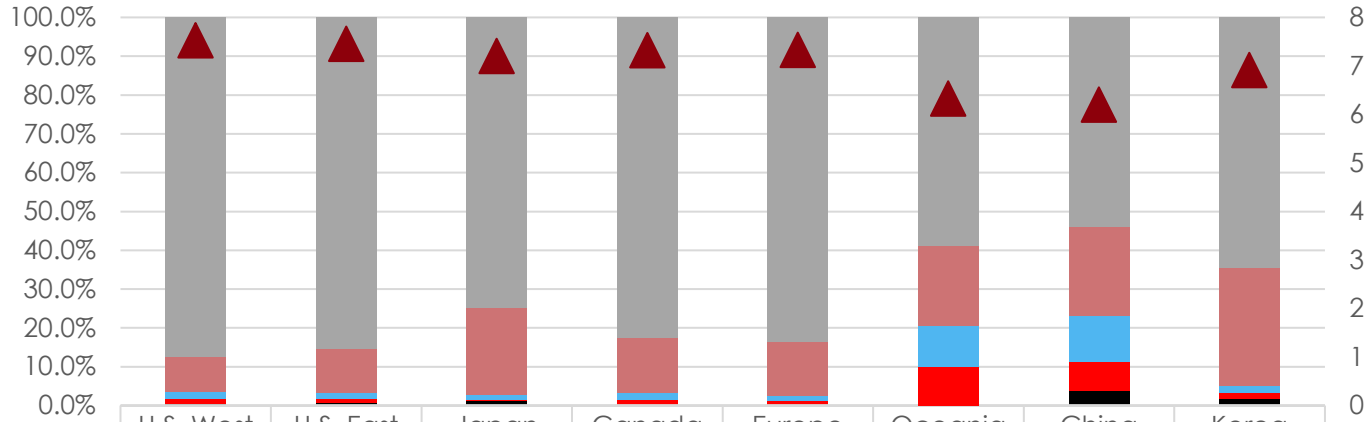


# REASONS FOR NOT RETURNING – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	41.3%	55.9%	59.1%	49.3%	50.7%	82.3%	66.5%	16.7%
Too expensive/cost	18.1%	22.0%	14.4%	34.5%	30.9%	29.3%	16.6%	50.0%
Flight too long	6.9%	17.4%	7.9%	26.5%	58.5%	9.8%	66.5%	33.3%
No reason to return/ nothing new	16.4%	14.9%	6.5%	14.9%	6.6%	0.0%	16.9%	0.0%
Other financial obligations	6.6%	6.7%	13.5%	5.9%	13.2%	19.6%	0.0%	0.0%
Not enough value for the price	10.0%	4.6%	0.9%	8.0%	2.6%	0.0%	16.6%	66.7%
Unfriendly people/ felt unwelcome	9.5%	4.6%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor health/ age restriction	4.1%	2.1%	7.4%	4.4%	9.2%	0.0%	0.0%	0.0%
Other (please specify)	3.5%	6.2%	1.4%	3.4%	0.0%	0.0%	0.0%	16.7%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	6.6%	1.0%	1.4%	6.3%	0.0%	0.0%	0.0%	0.0%
Nothing to do/ boring	2.9%	1.5%	4.2%	3.6%	0.0%	9.8%	16.6%	0.0%
Too crowded/ congested/ traffic	3.5%	1.5%	4.2%	3.8%	2.6%	0.0%	0.0%	16.7%
COVID 19	7.1%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor service	3.5%	1.5%	1.4%	1.3%	0.0%	0.0%	0.0%	16.7%
Too commercial/ overdeveloped	1.4%	1.5%	0.0%	2.1%	0.0%	9.8%	16.6%	0.0%

# ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	87.4%	85.4%	74.9%	82.7%	83.7%	58.7%	53.9%	64.5%
■ Somewhat likely (5-6)	9.0%	11.1%	22.2%	14.0%	13.7%	20.6%	23.1%	30.5%
■ Somewhat unlikely (3-4)	1.8%	1.6%	1.5%	1.7%	1.3%	10.8%	11.6%	1.7%
■ Very unlikely (1-2)	1.3%	1.3%	0.3%	1.5%	1.3%	9.8%	7.7%	1.7%
■ Not sure	0.5%	0.6%	1.2%	0.0%	0.0%	0.0%	3.8%	1.7%
BASE	2,307	1,187	396	446	83	20	26	59
▲ MEAN	7.52	7.46	7.20	7.32	7.33	6.33	6.20	6.92

# ISLAND OF HAWAI'I - BRAND/DESTINATION – ADVOCACY

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Females from U.S West, Canada, and Korea were stronger advocates for Hawai'i Island compared to males from these markets.
- Visitors from U.S. West and Canada whose trip consisted of visiting Hawai'i Island exclusively were stronger advocates for the island compared to those who visited multiple islands during their stay.

# ISLAND OF HAWAI'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	93.2%	95.3%	94.2%	96.9%	96.3%	95.6%	100.0%	96.6%
<b>On own (self guided)</b>	85.6%	86.3%	57.4%	91.6%	77.4%	73.9%	53.8%	73.0%
<b>Helicopter/ airplane</b>	2.6%	3.7%	2.3%	2.7%	5.8%	0.0%	69.2%	3.4%
<b>Boat/ submarine/ whale</b>	20.5%	24.8%	9.3%	25.6%	23.9%	9.8%	11.5%	16.9%
<b>Visit towns</b>	51.3%	53.9%	28.0%	67.4%	45.9%	55.4%	34.5%	45.8%
<b>Limo/ van/ bus tour</b>	1.9%	7.5%	33.9%	5.8%	9.0%	16.3%	19.2%	22.0%
<b>Scenic views/ natural landmark</b>	57.0%	63.8%	27.8%	67.8%	65.1%	65.2%	15.3%	61.0%
<b>Movie/ TV/ film location</b>	0.6%	1.3%	1.3%	1.1%	2.4%	0.0%	65.3%	22.0%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	93.7%	94.6%	93.7%	98.7%	94.7%	100.0%	100.0%	100.0%
<b>Beach/ sunbathing</b>	79.0%	77.7%	59.6%	87.3%	66.6%	55.4%	80.7%	76.3%
<b>Bodyboard</b>	15.3%	8.8%	1.2%	16.0%	5.0%	4.4%	3.9%	5.1%
<b>Standup paddle board</b>	7.7%	6.5%	1.6%	3.8%	0.0%	4.4%	3.9%	8.5%
<b>Surfing</b>	4.8%	4.5%	0.5%	3.6%	5.0%	9.8%	3.9%	8.5%
<b>Canoeing/ kayak</b>	7.5%	7.4%	3.4%	6.3%	8.7%	0.0%	0.0%	3.4%
<b>Swim ocean</b>	65.4%	60.7%	22.4%	68.5%	59.5%	45.6%	26.9%	45.7%
<b>Snorkel</b>	54.1%	47.2%	16.1%	56.1%	32.0%	40.2%	26.9%	23.7%
<b>Freediving</b>	2.4%	1.9%	0.4%	1.3%	0.0%	0.0%	7.7%	0.0%
<b>Windsurf/ Kitesurf</b>	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.5%	0.6%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	4.7%	4.5%	0.7%	2.1%	3.4%	0.0%	0.0%	0.0%
<b>Fishing</b>	5.9%	5.2%	0.5%	2.8%	0.0%	5.4%	3.8%	0.0%
<b>Golf</b>	10.2%	8.0%	14.3%	8.9%	3.7%	4.4%	0.0%	8.5%

509 Q During this trip, which of the following activities did you participate in?

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# ISLAND OF HAWAI'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	93.7%	94.6%	93.7%	98.7%	94.7%	100.0%	100.0%	100.0%
<b>Run/ Jog/ Fitness walk</b>	36.2%	33.2%	14.4%	35.8%	17.6%	26.1%	11.5%	10.2%
<b>Spa</b>	5.6%	7.1%	5.6%	3.6%	2.1%	4.4%	0.0%	1.7%
<b>Hiking</b>	49.7%	55.5%	11.9%	51.9%	45.7%	19.6%	38.5%	25.5%
<b>Backpack/Camp</b>	1.8%	3.9%	0.0%	2.8%	2.4%	0.0%	11.6%	0.0%
<b>Agritourism</b>	11.7%	15.1%	24.6%	19.6%	15.2%	10.8%	26.8%	32.2%
<b>Sport event/ tournament</b>	0.8%	0.8%	1.1%	2.2%	1.0%	0.0%	0.0%	1.7%
<b>Park/ botanical garden</b>	31.4%	42.2%	20.0%	44.3%	50.7%	43.5%	46.1%	25.5%
<b>Waterpark</b>	0.6%	0.6%	1.6%	1.1%	1.0%	0.0%	7.7%	1.7%
<b>Mountain tube/ waterfall rappel</b>	0.8%	1.0%	1.5%	0.9%	3.7%	0.0%	0.0%	1.7%
<b>Zip lining</b>	2.8%	3.0%	0.0%	2.1%	2.4%	4.4%	0.0%	0.0%
<b>Skydiving</b>	0.4%	0.2%	0.3%	0.2%	1.3%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	1.8%	3.0%	0.3%	2.1%	2.6%	0.0%	3.9%	5.1%
<b>Horseback riding</b>	2.0%	2.6%	3.5%	2.1%	0.0%	0.0%	7.7%	3.4%

# ISLAND OF HAWAI'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.3%	97.5%	96.0%	98.7%	98.7%	100.0%	96.2%	96.6%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	13.4%	17.7%	7.3%	19.0%	29.1%	10.8%	73.2%	44.0%
<b>Live music/ stage show</b>	13.7%	17.7%	15.7%	26.7%	11.8%	10.8%	11.6%	18.6%
<b>Nightclub/ dancing/ bar/ karaoke</b>	5.9%	5.6%	1.7%	6.4%	5.3%	15.2%	0.0%	0.0%
<b>Fine dining</b>	41.1%	42.1%	25.8%	42.1%	37.3%	34.8%	42.3%	30.6%
<b>Family restaurant</b>	56.1%	55.6%	28.0%	66.3%	43.3%	59.8%	34.6%	47.5%
<b>Fast food</b>	32.9%	32.9%	42.6%	41.0%	35.7%	35.8%	38.4%	52.5%
<b>Food truck</b>	18.3%	18.2%	5.9%	17.2%	17.6%	0.0%	11.6%	37.2%
<b>Café/ coffee house</b>	45.2%	46.9%	46.4%	56.6%	55.9%	75.0%	26.9%	52.5%
<b>Ethnic dining</b>	22.6%	27.2%	4.9%	20.9%	16.5%	9.8%	15.4%	20.4%
<b>Prepared own meal</b>	72.6%	60.9%	22.3%	75.8%	52.9%	40.2%	26.9%	27.2%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# ISLAND OF HAWAI'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	94.3%	94.3%	97.7%	97.6%	94.7%	100.0%	96.2%	89.8%
<b>Mall/ department store</b>	23.4%	21.1%	51.5%	48.8%	41.7%	33.7%	53.8%	77.9%
<b>Designer boutique</b>	10.4%	12.6%	5.5%	16.0%	4.7%	0.0%	0.0%	5.1%
<b>Hotel/ resort store</b>	18.6%	24.4%	32.1%	25.3%	15.7%	29.4%	30.7%	25.5%
<b>Swap meet/ flea market</b>	9.9%	10.3%	4.7%	16.1%	1.3%	10.8%	0.0%	1.7%
<b>Discount/ outlet store</b>	10.1%	10.2%	7.8%	16.5%	16.0%	0.0%	23.1%	47.5%
<b>Supermarket</b>	77.3%	69.9%	75.8%	81.8%	75.0%	59.8%	69.0%	61.0%
<b>Farmer's market</b>	50.6%	43.5%	18.9%	60.6%	46.1%	41.3%	19.2%	5.1%
<b>Convenience store</b>	38.5%	40.1%	23.4%	48.2%	25.5%	60.8%	42.3%	52.5%
<b>Duty free store</b>	0.9%	1.3%	5.0%	2.7%	3.1%	4.4%	34.6%	35.5%
<b>Local shop/ artisan</b>	57.6%	61.4%	16.8%	65.7%	65.9%	56.5%	27.0%	22.1%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents



# ISLAND OF HAWAI'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	51.0%	60.7%	62.6%	70.5%	73.2%	56.5%	76.9%	78.0%
<b>Historic military site</b>	4.4%	9.3%	17.1%	8.0%	19.2%	10.8%	42.2%	17.0%
<b>Other historical site</b>	31.4%	38.4%	28.2%	44.2%	45.9%	51.1%	23.1%	35.7%
<b>Museum/ art gallery</b>	10.4%	11.6%	4.8%	18.4%	21.0%	25.0%	15.4%	13.6%
<b>Luau/ Polynesian show/ hula show</b>	7.6%	16.7%	13.2%	25.3%	18.4%	20.6%	7.7%	33.9%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.4%	3.9%	6.3%	5.5%	2.4%	5.4%	7.7%	6.8%
<b>Play/ concert/ theatre</b>	1.5%	1.4%	1.4%	4.0%	1.0%	0.0%	3.8%	5.1%
<b>Art/ craft fair</b>	10.8%	9.6%	2.5%	16.6%	12.6%	0.0%	26.9%	5.1%
<b>Festival event</b>	4.5%	3.3%	2.9%	4.5%	4.4%	0.0%	0.0%	1.7%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# ISLAND OF HAWAI'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	83.9%	86.9%	98.3%	95.8%	95.3%	94.6%	88.4%	98.3%
<b>Airport shuttle</b>	11.0%	10.4%	24.6%	16.7%	11.0%	10.8%	7.7%	10.2%
<b>Trolley</b>	0.6%	1.2%	22.5%	5.1%	4.4%	0.0%	3.8%	11.9%
<b>Public bus</b>	0.5%	0.8%	1.7%	1.3%	5.8%	4.4%	7.7%	8.5%
<b>Tour bus/ tour van</b>	1.5%	6.8%	37.9%	7.0%	7.4%	31.5%	11.5%	37.2%
<b>Taxi/ limo</b>	4.0%	5.9%	18.9%	6.6%	14.2%	9.8%	11.5%	20.3%
<b>Rental car</b>	78.6%	78.3%	41.7%	89.8%	83.2%	63.1%	69.3%	62.8%
<b>Ride share</b>	6.0%	8.7%	2.8%	7.9%	6.0%	26.1%	11.6%	11.9%
<b>Bicycle rental</b>	2.2%	0.9%	1.7%	2.5%	2.1%	0.0%	3.8%	1.7%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# ISLAND OF HAWAI'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	41.4%	33.9%	10.1%	24.1%	14.6%	10.8%	15.4%	20.4%
Visit friends/ family	40.9%	33.3%	8.9%	23.7%	12.6%	10.8%	15.4%	20.4%
Volunteer non profit	1.3%	1.1%	1.2%	0.6%	2.1%	5.4%	0.0%	0.0%

Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>‘Akaka Falls</b>	23.9%	30.6%	23.3%	36.7%	40.2%	15.2%	23.1%	20.4%
<b>Botanical Gardens</b>	12.1%	13.9%	1.4%	24.5%	31.2%	30.4%	23.1%	6.8%
<b>H.N. Greenwell Store</b>	2.5%	3.2%	1.2%	5.9%	2.4%	0.0%	3.8%	3.4%
<b>Hawaii Volcanoes National Park</b>	41.8%	59.4%	56.7%	58.3%	79.0%	54.4%	80.8%	59.3%
<b>Hilo Farmers Market</b>	19.4%	22.1%	13.5%	22.6%	23.6%	35.8%	23.1%	17.0%
<b>Hulihe‘e Palace</b>	3.1%	4.5%	7.2%	5.9%	5.8%	10.8%	0.0%	6.8%
<b>‘Imiloa Astronomy Ctr</b>	1.2%	1.9%	0.9%	4.5%	4.7%	4.4%	26.9%	6.8%
<b>Kaloko Honokohau National Historical Park</b>	8.2%	12.6%	2.3%	13.3%	14.4%	5.4%	7.7%	0.0%
<b>Kona Coffee Living History Farm</b>	7.8%	12.6%	29.0%	19.4%	16.3%	10.8%	3.8%	64.4%
<b>Lili‘uokalani Park and Garden</b>	7.0%	9.2%	2.2%	6.3%	15.5%	5.4%	0.0%	1.7%

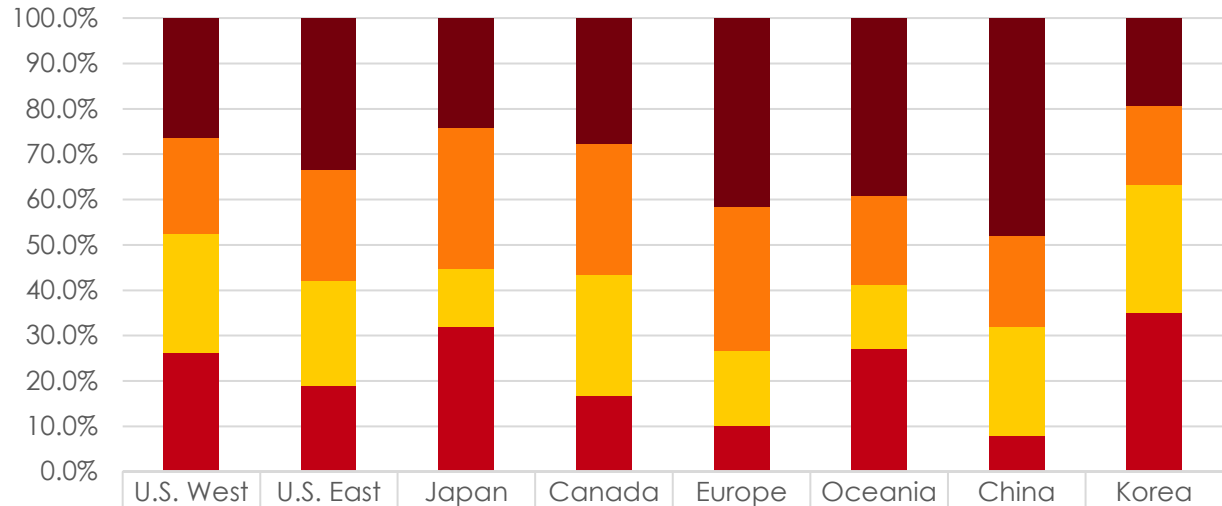
Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

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

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Lyman House Memorial Museum</b>	1.3%	1.4%	0.5%	2.7%	4.4%	0.0%	0.0%	1.7%
<b>Maunakea</b>	15.3%	21.4%	40.8%	22.1%	34.9%	20.6%	50.0%	39.0%
<b>Orchid Farm</b>	2.1%	2.6%	0.5%	2.8%	4.7%	4.4%	3.8%	5.1%
<b>Pacific Tsunami Museum</b>	1.1%	1.9%	1.3%	4.4%	10.5%	5.4%	3.8%	3.4%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	2.2%	2.8%	0.5%	5.4%	2.4%	0.0%	7.7%	3.4%
<b>Pu'uhonua o Honaunau National Historical Park</b>	18.6%	22.6%	3.9%	25.5%	26.8%	0.0%	0.0%	13.6%
<b>Pu'ukohola Heia National Historical Site</b>	8.9%	12.5%	2.3%	13.3%	12.4%	5.4%	3.8%	1.7%
<b>Punalu'u Black Sand Beach</b>	29.2%	41.6%	23.6%	41.9%	36.2%	26.1%	50.1%	27.1%
<b>Rainbow Falls</b>	22.1%	30.8%	17.6%	30.9%	40.0%	36.9%	38.4%	25.4%
<b>Volcano Art Center</b>	6.5%	8.1%	13.9%	10.5%	26.3%	19.6%	7.7%	23.8%

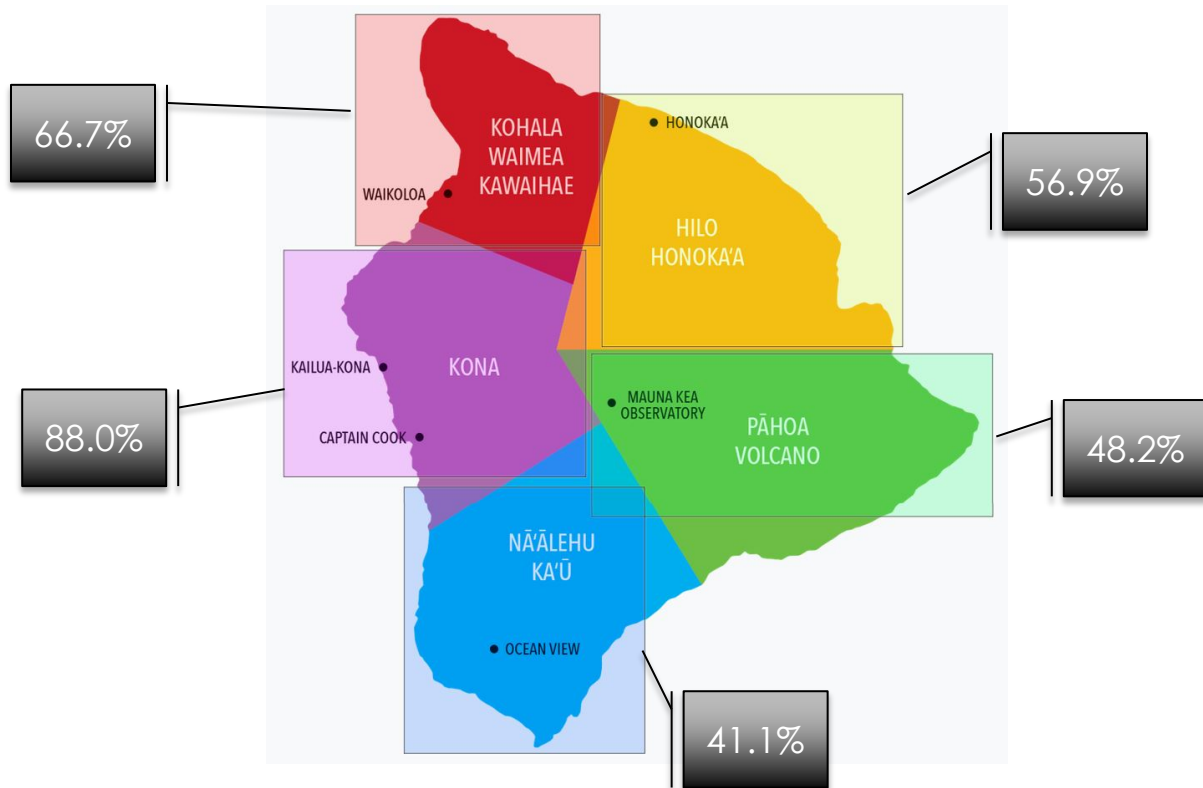
Caution small base: Europe, Oceania, China, and Korea less than 100 respondents

# TRAVEL ON ISLAND OF HAWAI'I



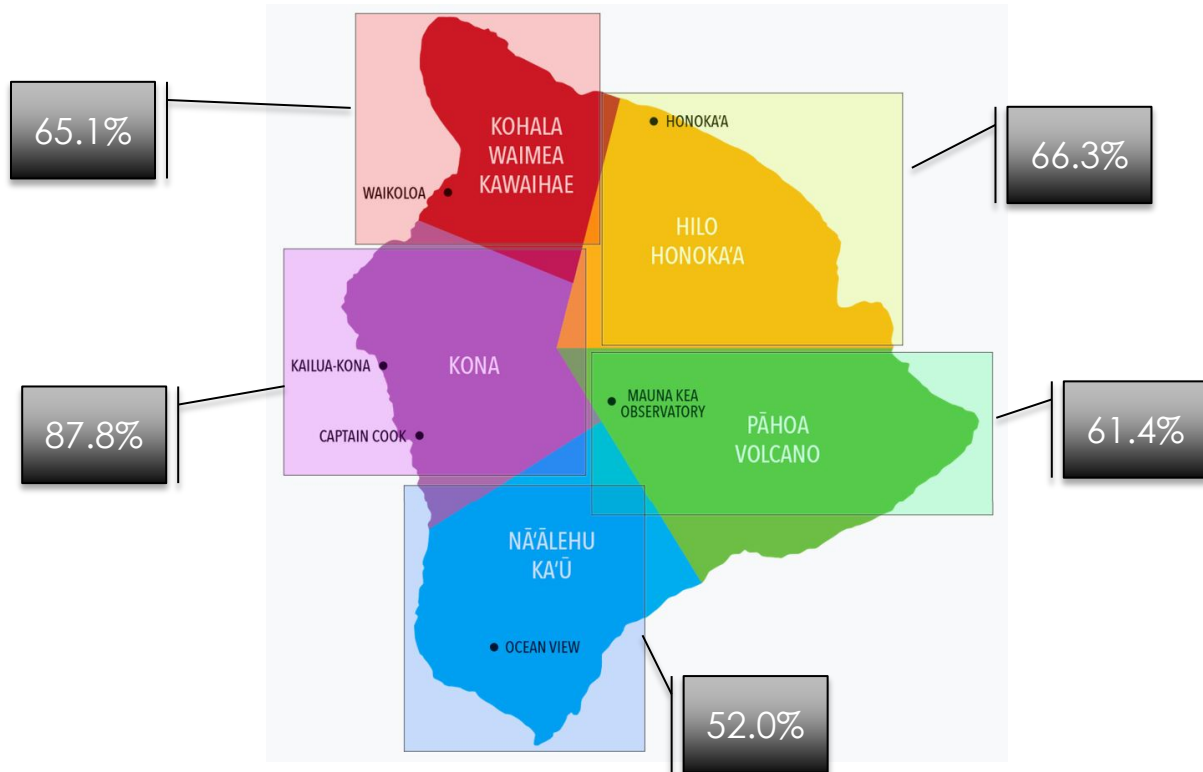
Traveled to other side of island	26.5%	33.4%	24.1%	27.5%	41.5%	39.2%	47.9%	19.3%
Traveled more than 1 hour	21.0%	24.5%	31.2%	29.1%	31.9%	19.6%	20.1%	17.5%
Traveled 1 hour or less one way to reach activity	26.2%	23.1%	12.7%	26.6%	16.5%	14.2%	24.0%	28.1%
Enjoy activities- short drive from accommodations	26.3%	19.0%	32.0%	16.7%	10.1%	27.1%	8.0%	35.1%
BASE	2,297	1,174	393	439	82	20	25	57

# AREAS VISITED U.S. WEST



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

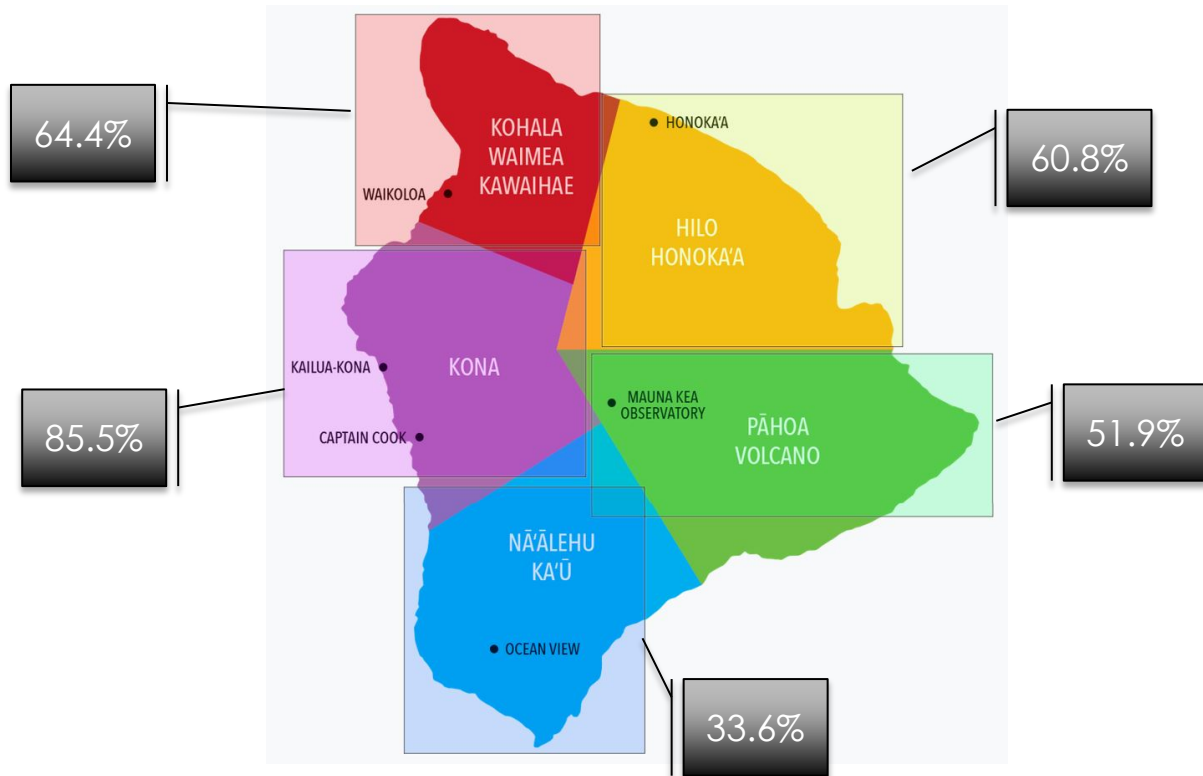
# AREAS VISITED U.S. EAST



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

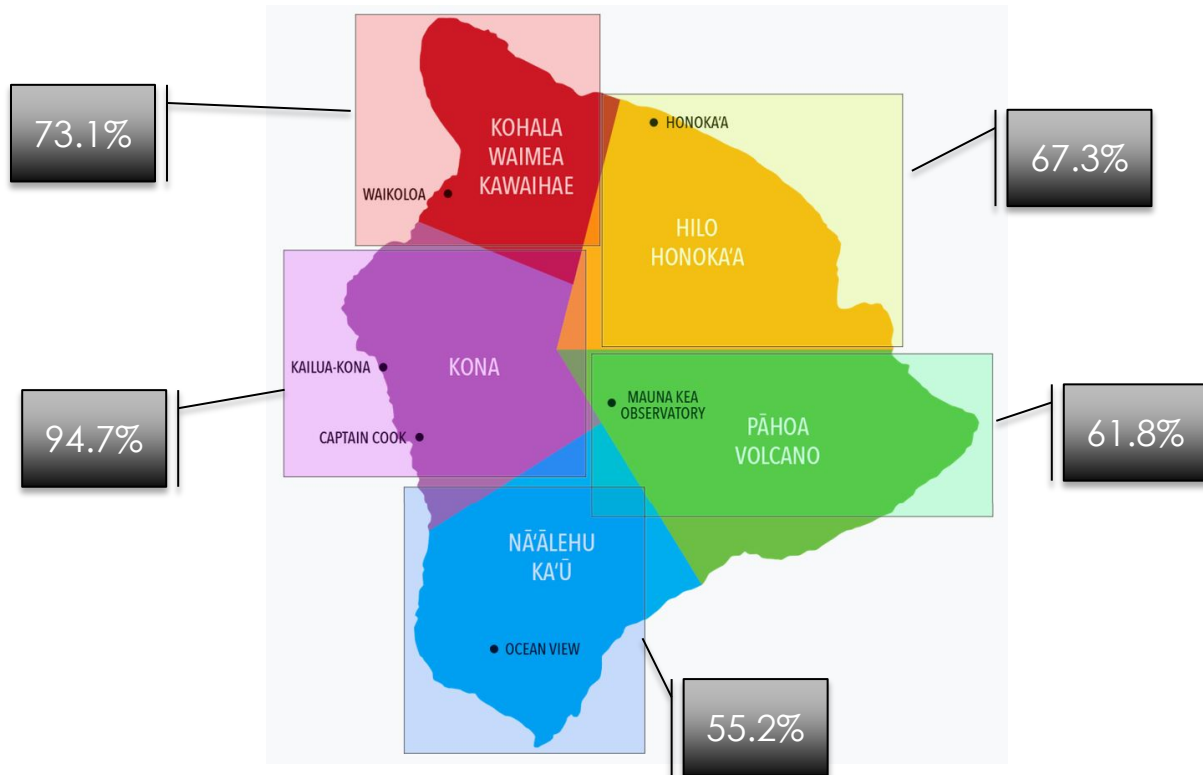


# AREAS VISITED JAPAN



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

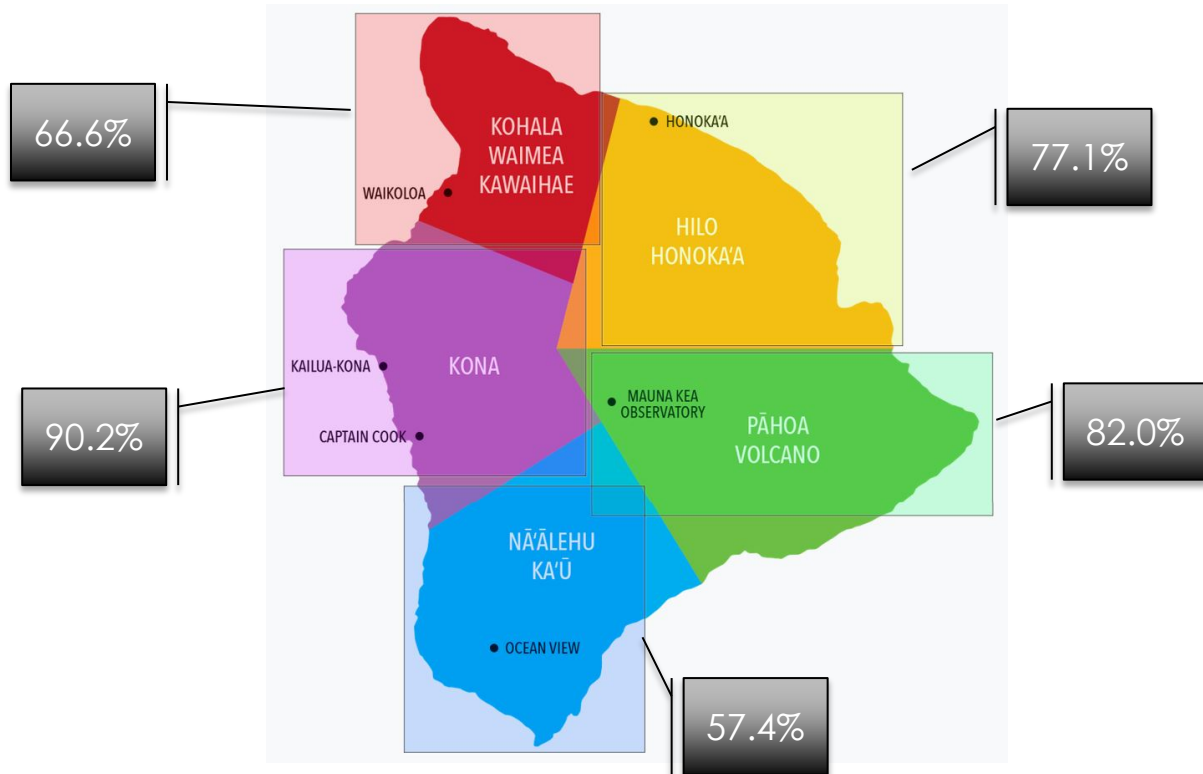
# AREAS VISITED CANADA



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

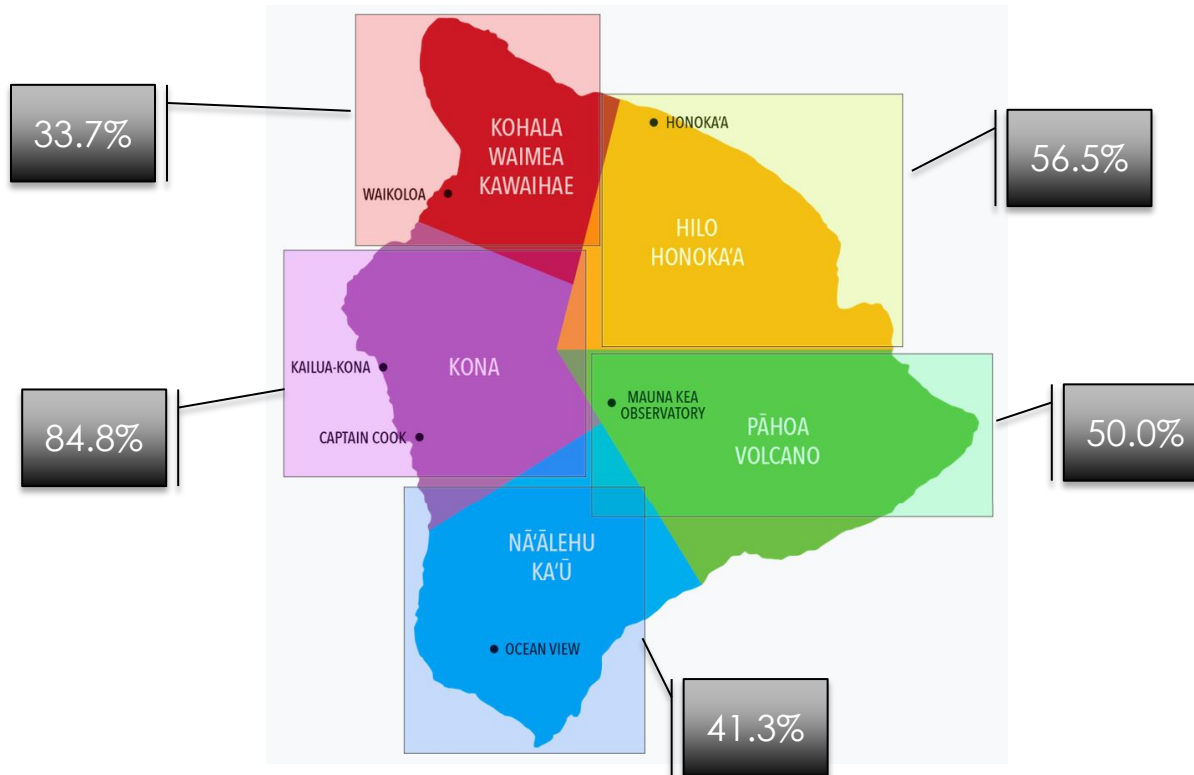
[A]

# AREAS VISITED EUROPE



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

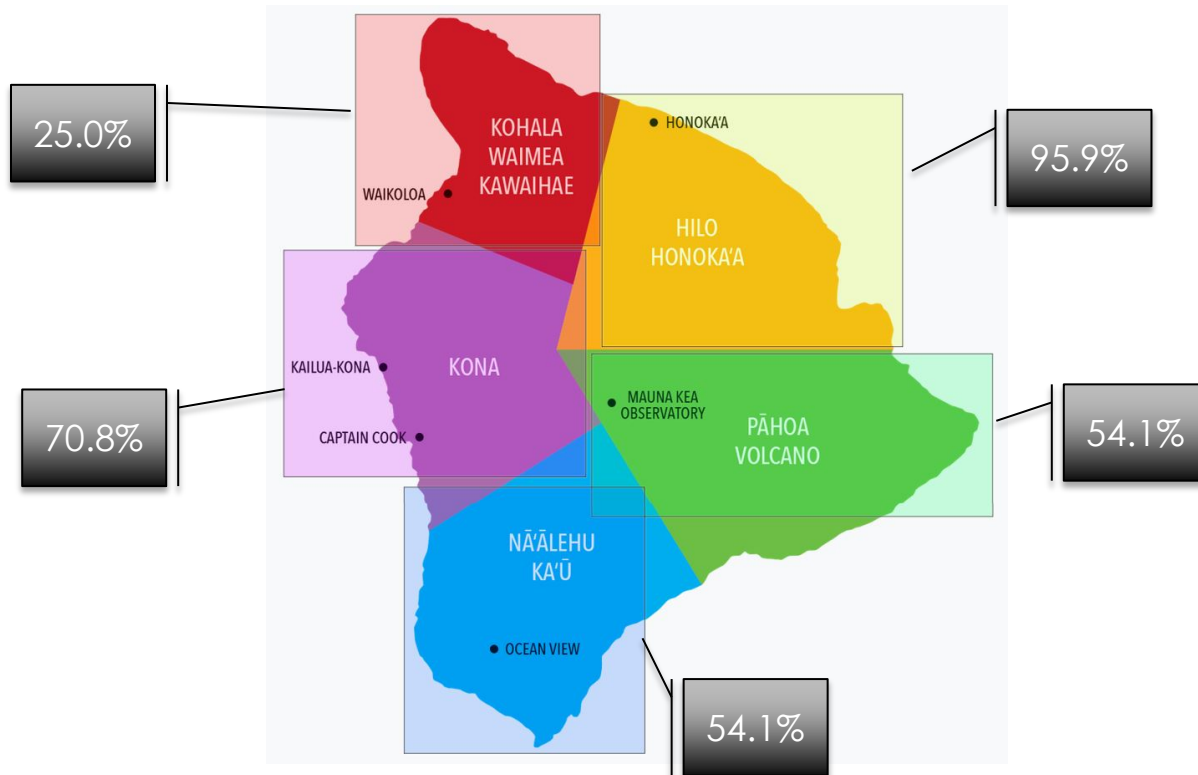
# AREAS VISITED OCEANIA



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

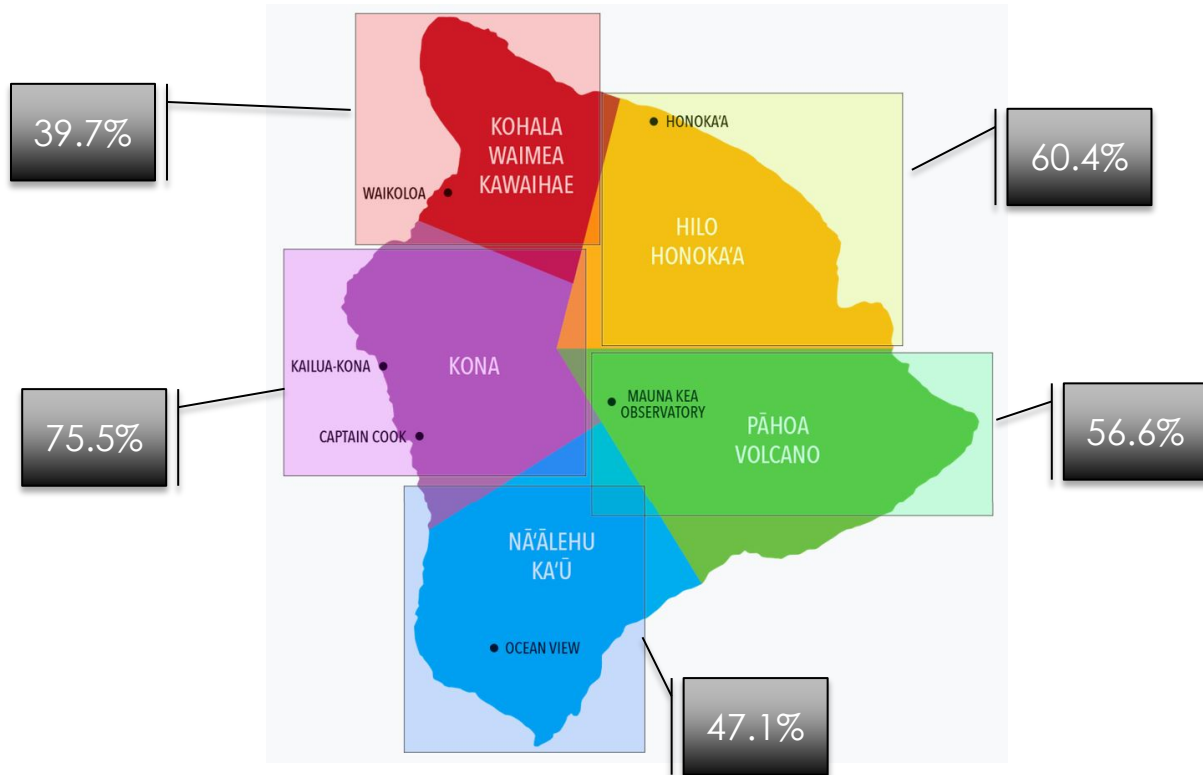
[A]

# AREAS VISITED CHINA



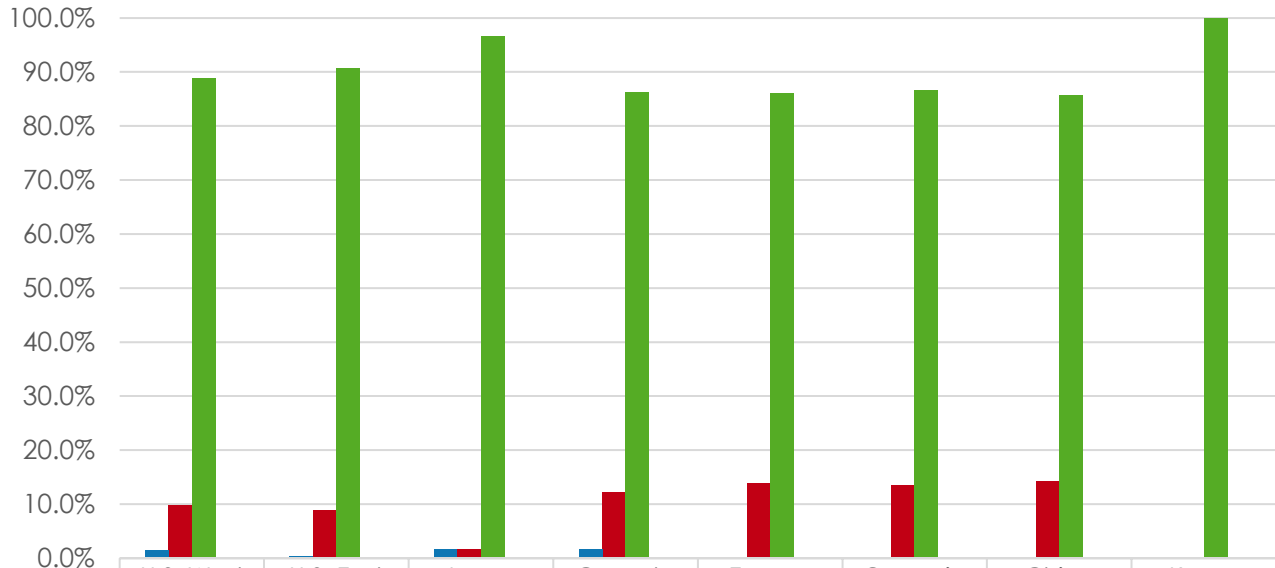
525 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# AREAS VISITED KOREA



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

# SNORKELING EQUIPMENT USED – HAWAI‘I ISLAND



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other Response	1.5%	0.4%	1.7%	1.6%	0.0%	0.0%	0.0%	0.0%
Full-face snorkel mask	9.8%	9.0%	1.7%	12.1%	13.9%	13.5%	14.2%	0.0%
2-Piece, separate mask & snorkel	88.8%	90.7%	96.6%	86.2%	86.1%	86.5%	85.8%	100.0%
BASE	1,237	559	65	250	27	8	7	14

# SNORKELING EQUIPMENT USED – HAWAI‘I ISLAND

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	98.1%	97.9%	98.3%	99.2%	96.7%	100.0%	85.8%	100.0%
Yes, while using a 2 piece mask & snorkel	1.3%	0.9%	0.0%	0.0%	3.3%	0.0%	14.2%	0.0%
Yes, while using a full face snorkel mask	0.1%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.6%	0.9%	1.7%	0.4%	0.0%	0.0%	0.0%	0.0%

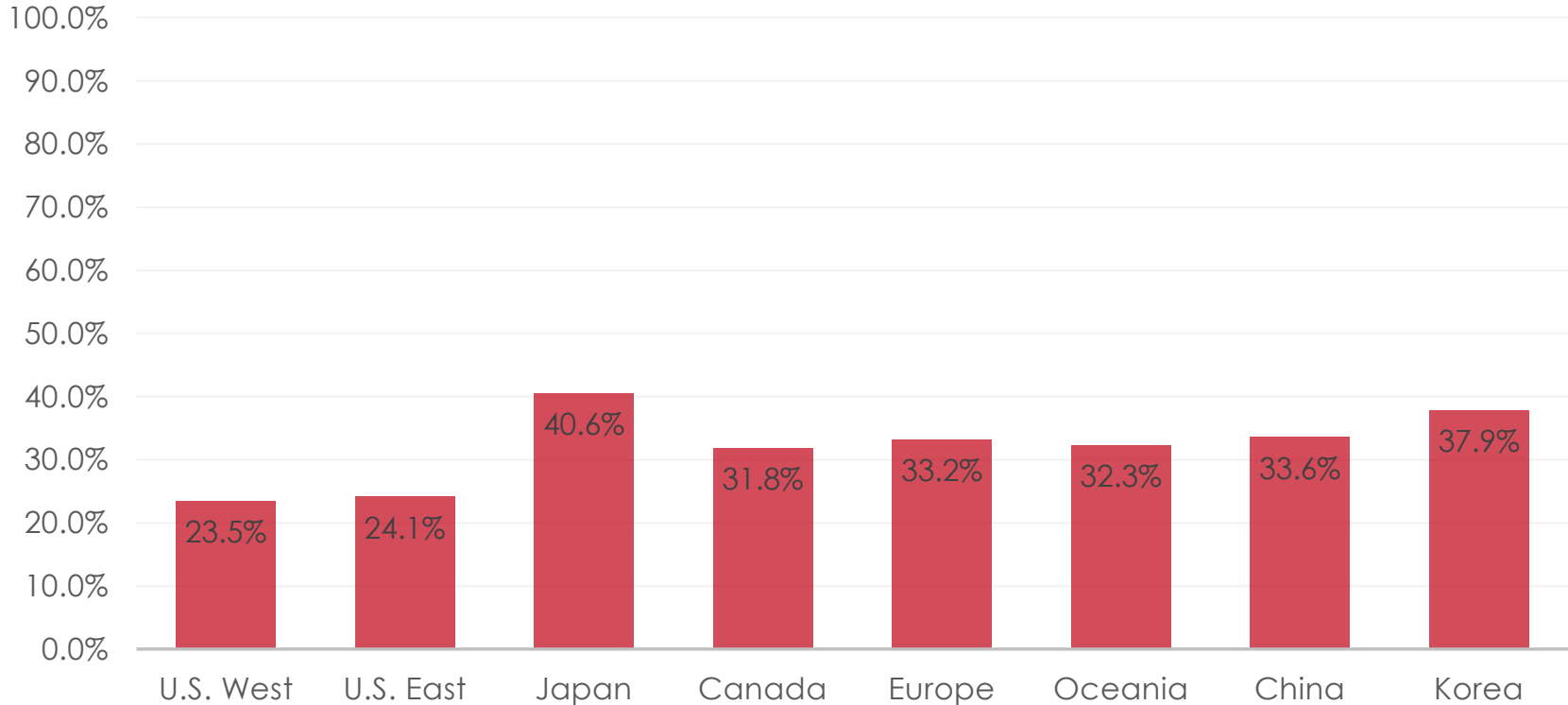
Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – MAUI

# AIDED ADVERTISING AWARENESS – MAUI



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

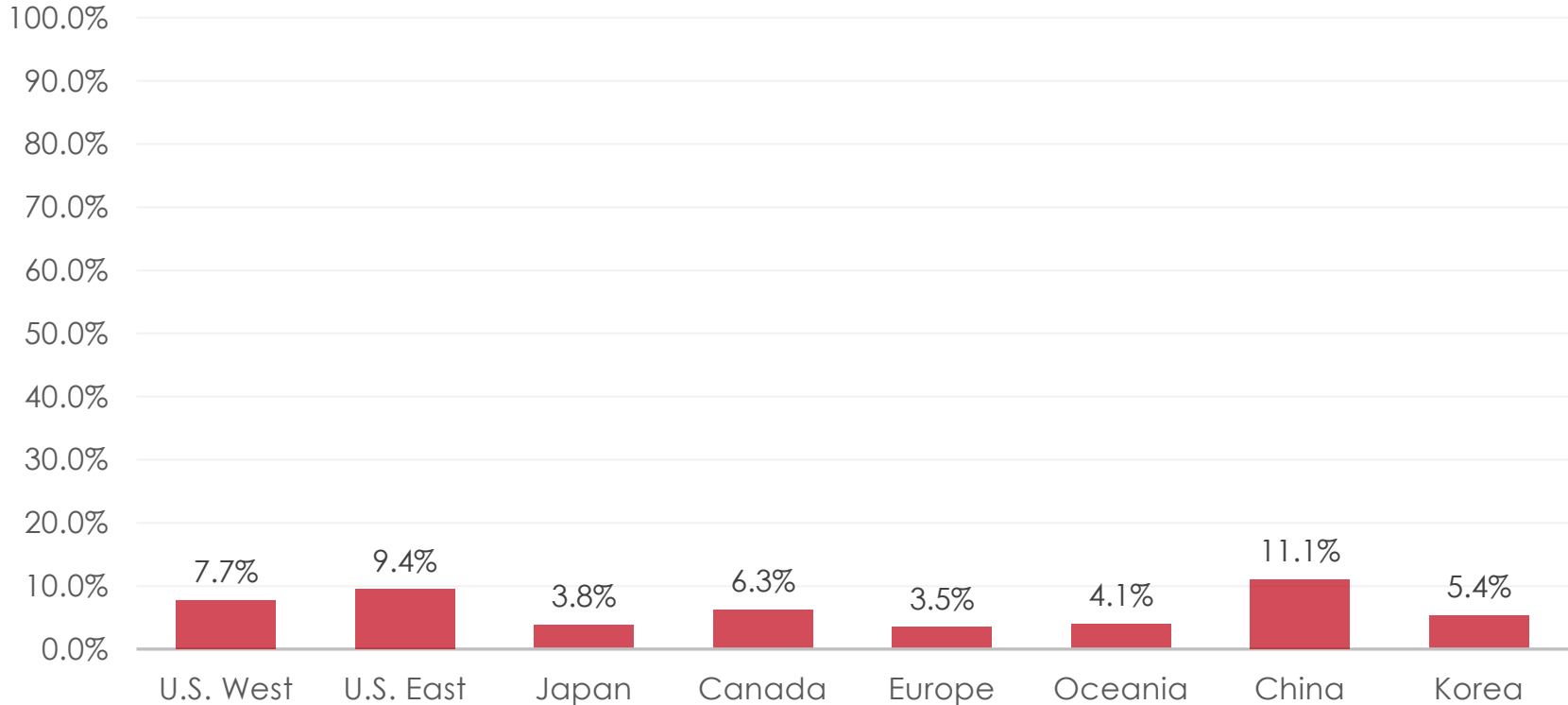
530 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?



# AIDED ADVERTISING AWARENESS – MAUI

- Aided advertising awareness tended to be higher among older segments, particularly seniors from both U.S. West and U.S. East.
- Less educated visitors or those without a college degree from U.S. West and Japan were more likely to recall advertising for Maui prior to their arrival.
- Those visitors whose trip included stays at multiple islands in addition to Maui were more likely to recall being exposed to ads for the island from the following visitor markets: U.S. West, U.S. East, and Japan.
- Repeat visitors from U.S East were more likely to recall advertising for Maui compared to first-time visitors from this market.

# AIDED ADVERTISING AWARENESS – MAUI JIM MAUI INVITATIONAL

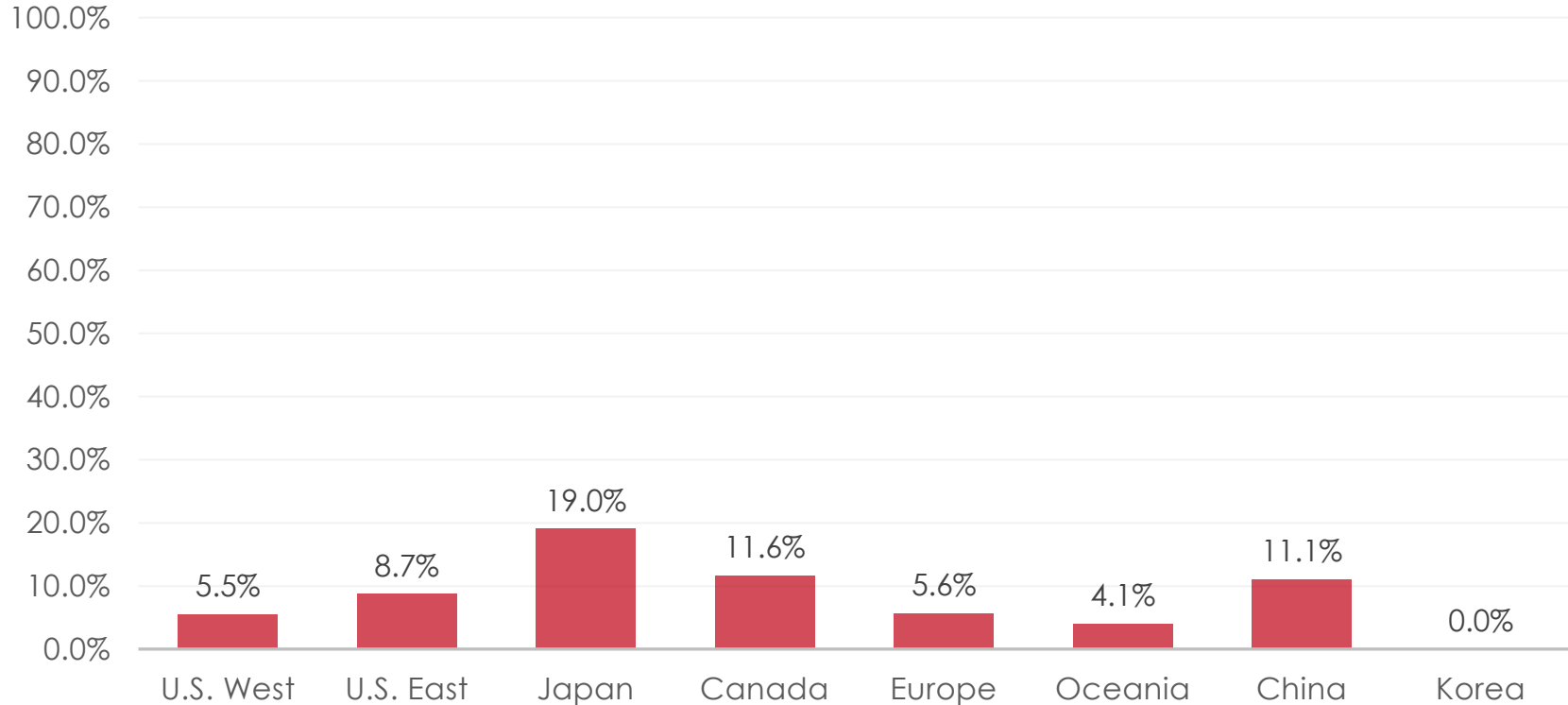


Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

532 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?



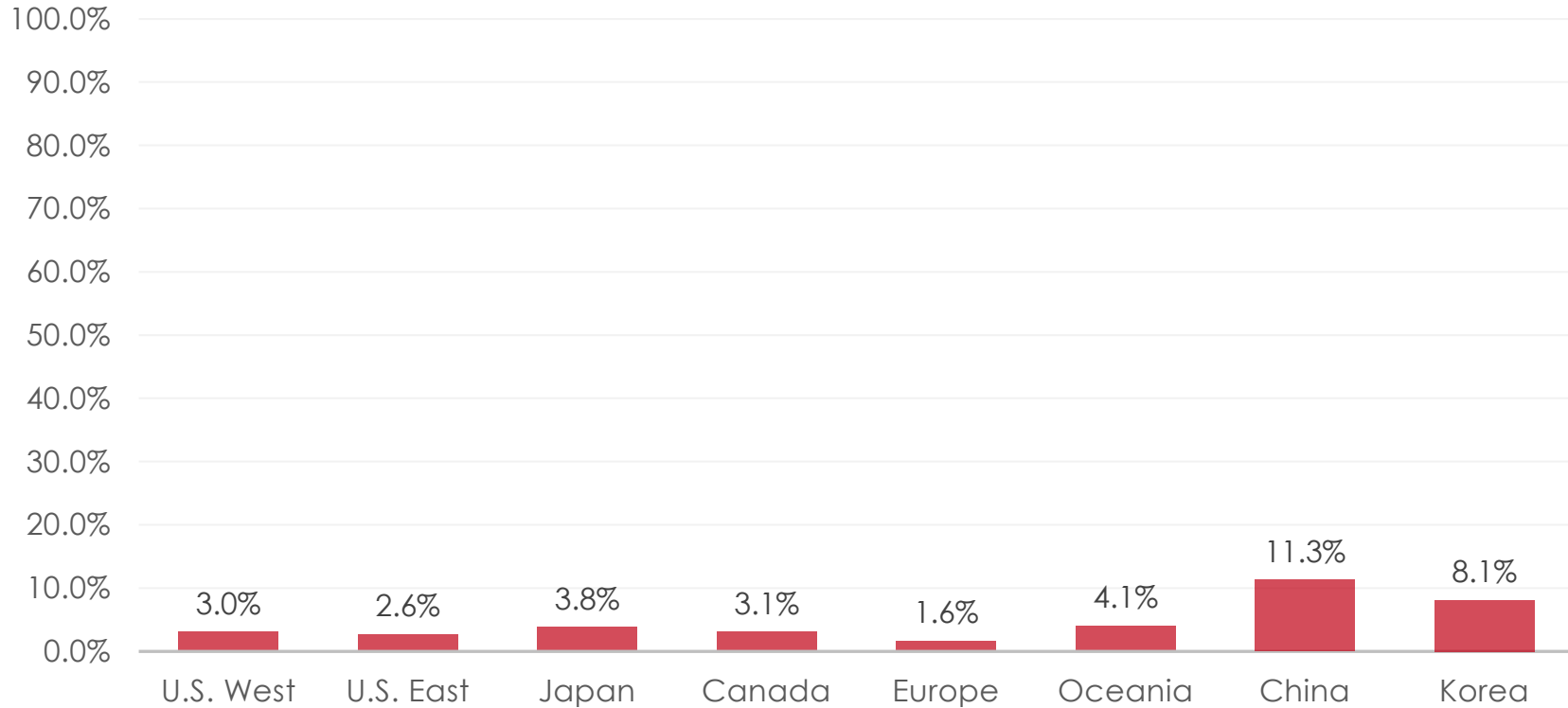
# AIDED ADVERTISING AWARENESS – SENTRY GOLF TOURNAMENT



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

533 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?

# AIDED ADVERTISING AWARENESS – XTERRA

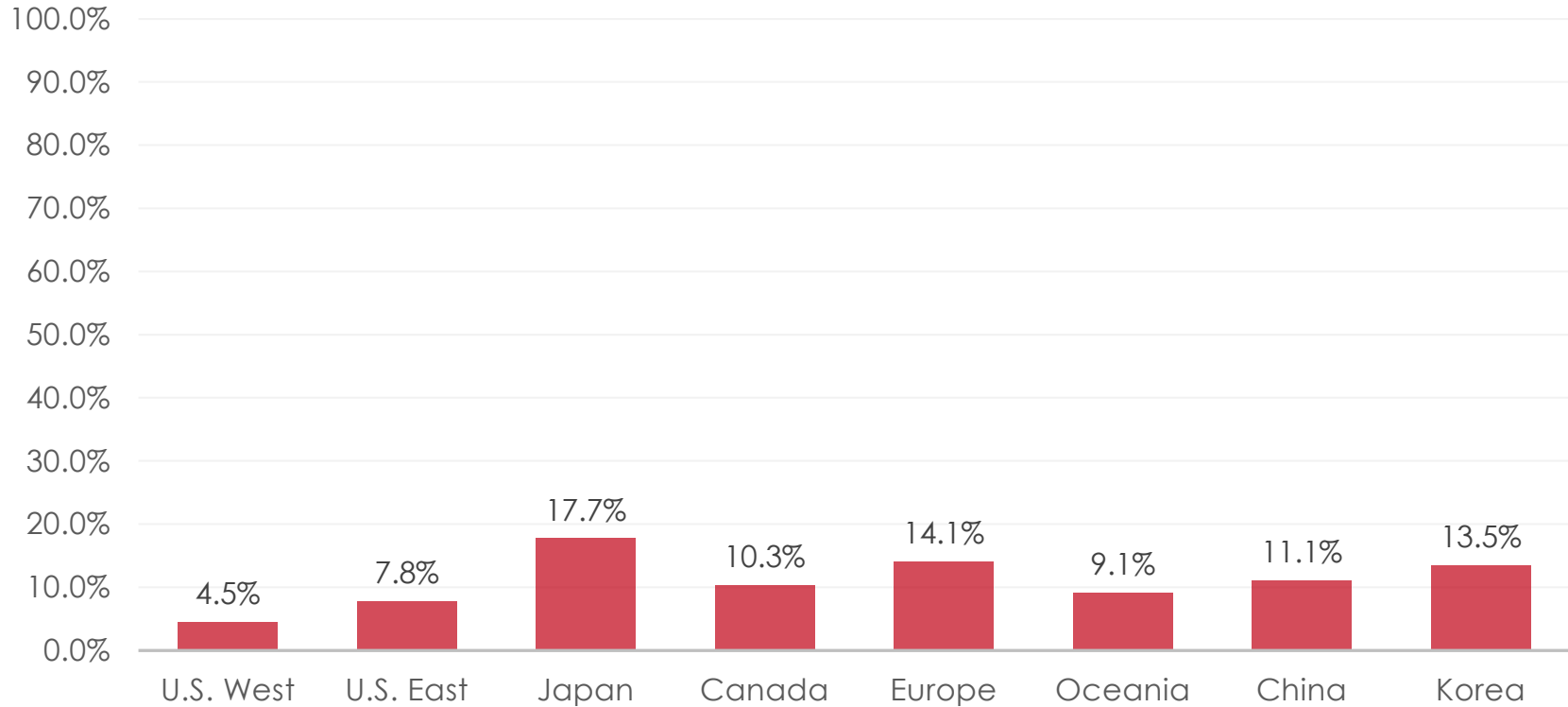


Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

534 Q. Do you remember seeing or hearing advertising for the island of Maui prior to your arrival?

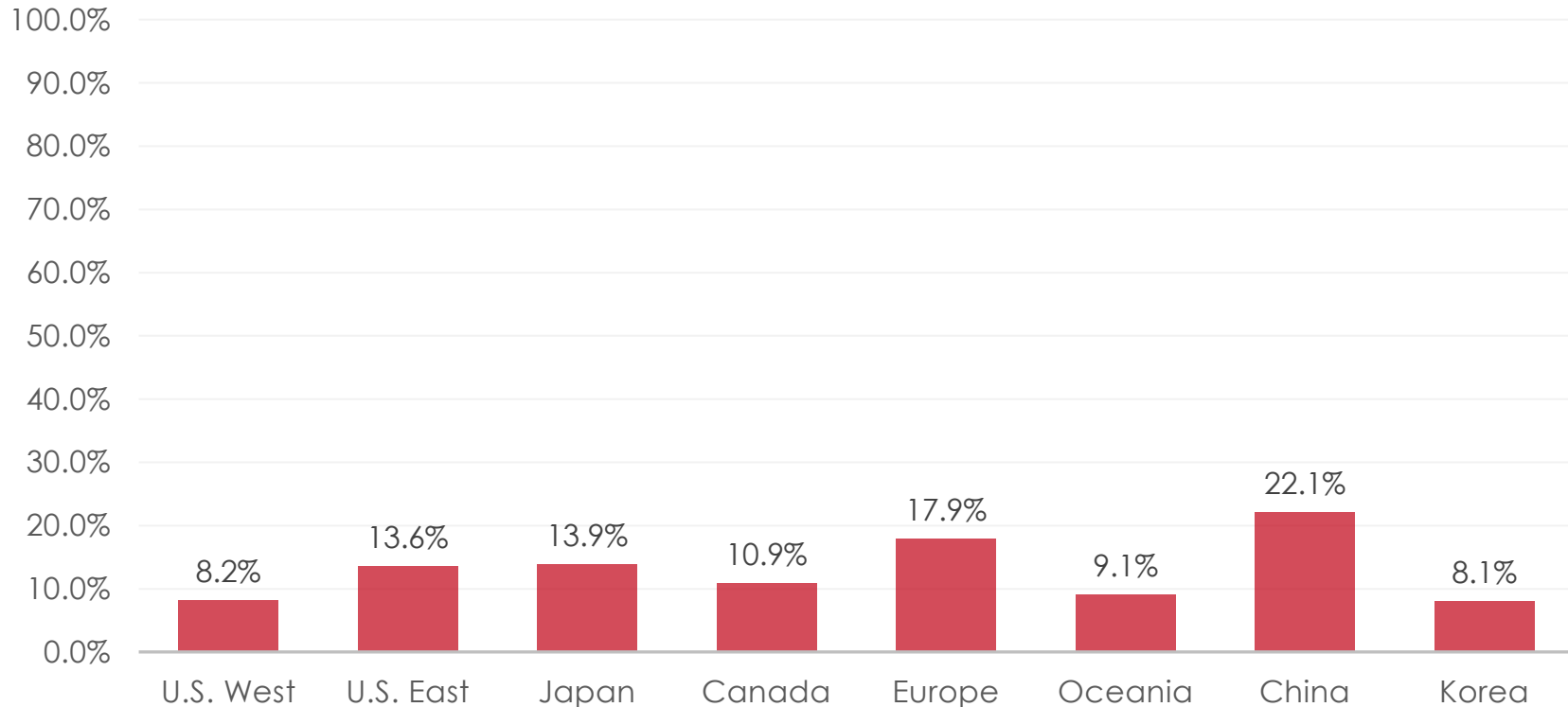


# IMPACT OF LOCATION FILMING – MAUI



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

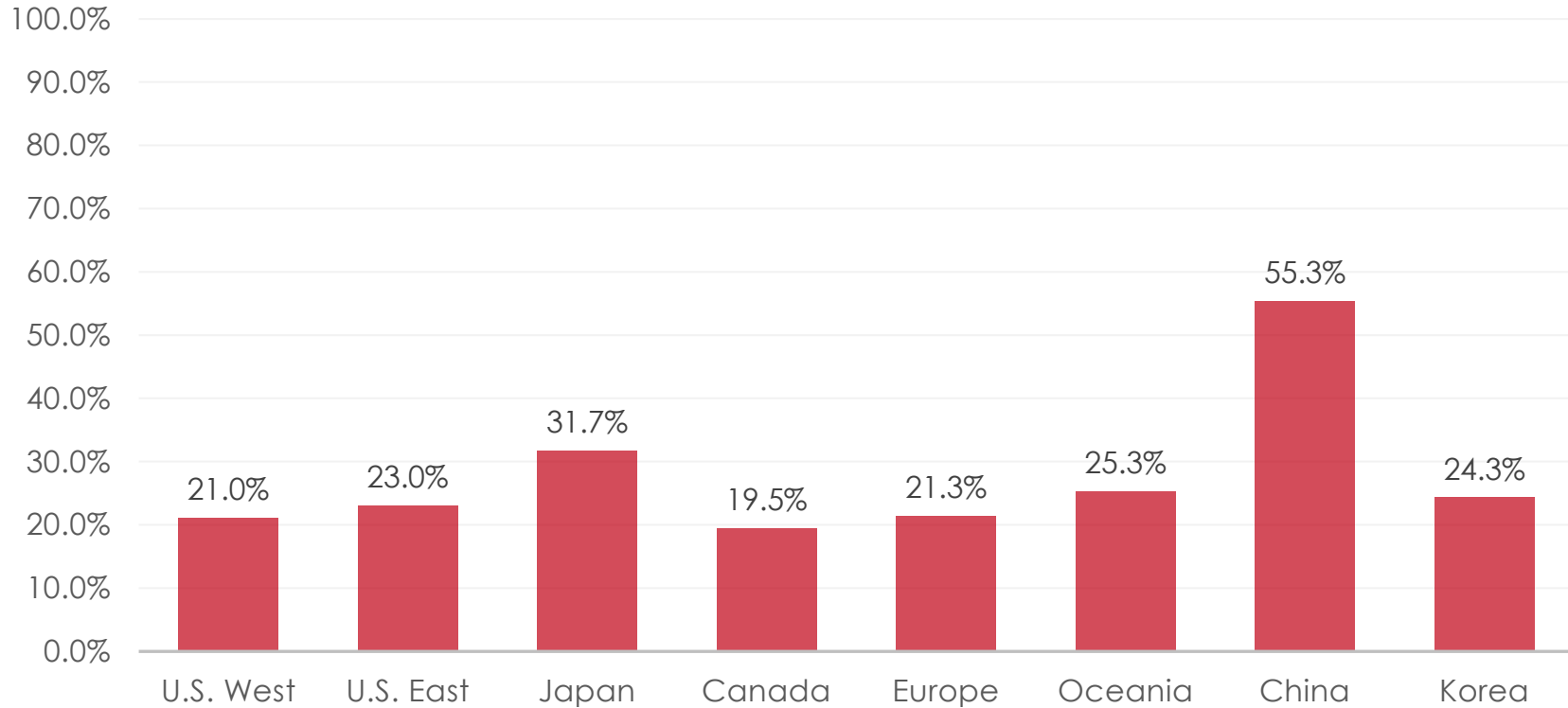
# IMPACT OF HAWAIIAN CULTURAL EVENT – MAUI



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

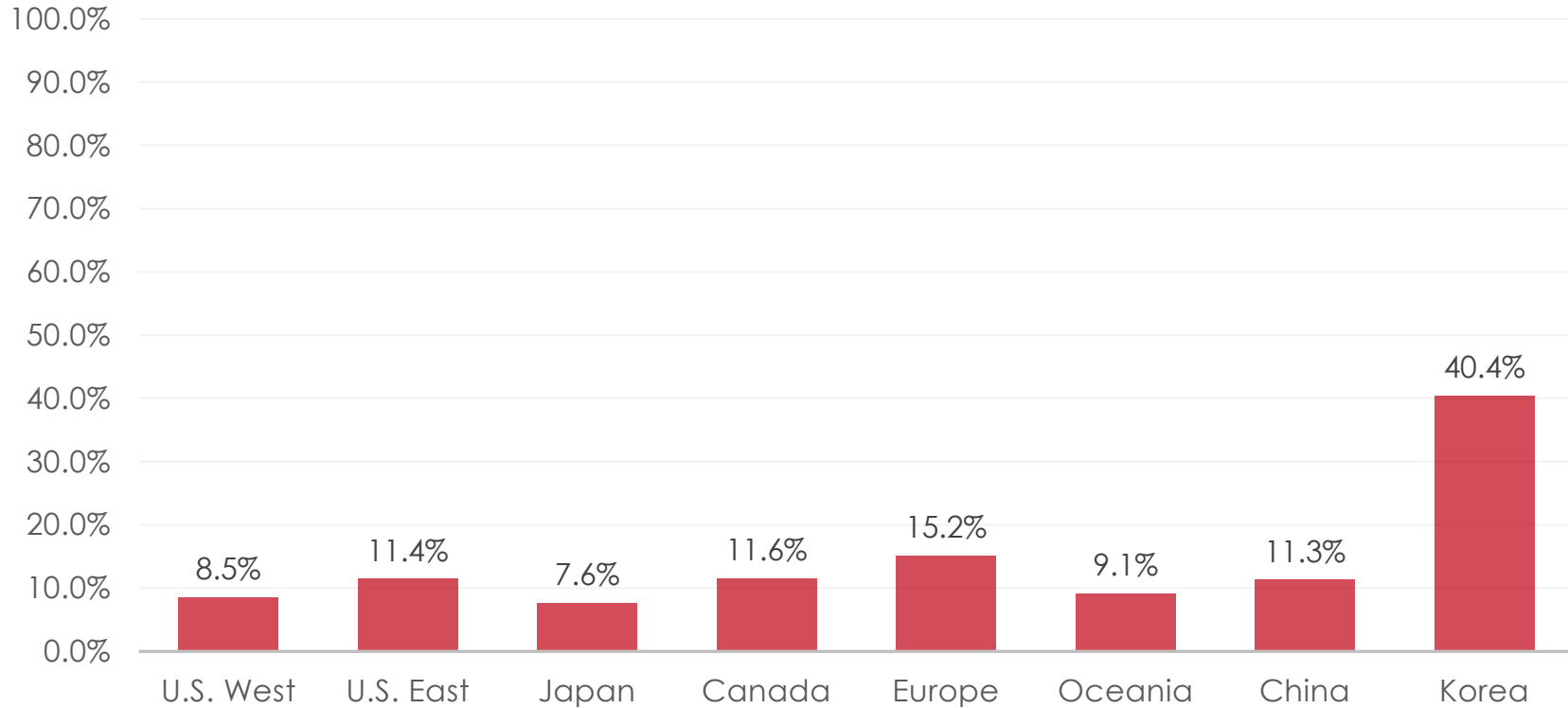


# IMPACT OF OUTDOOR/ SPORTING EVENT – MAUI



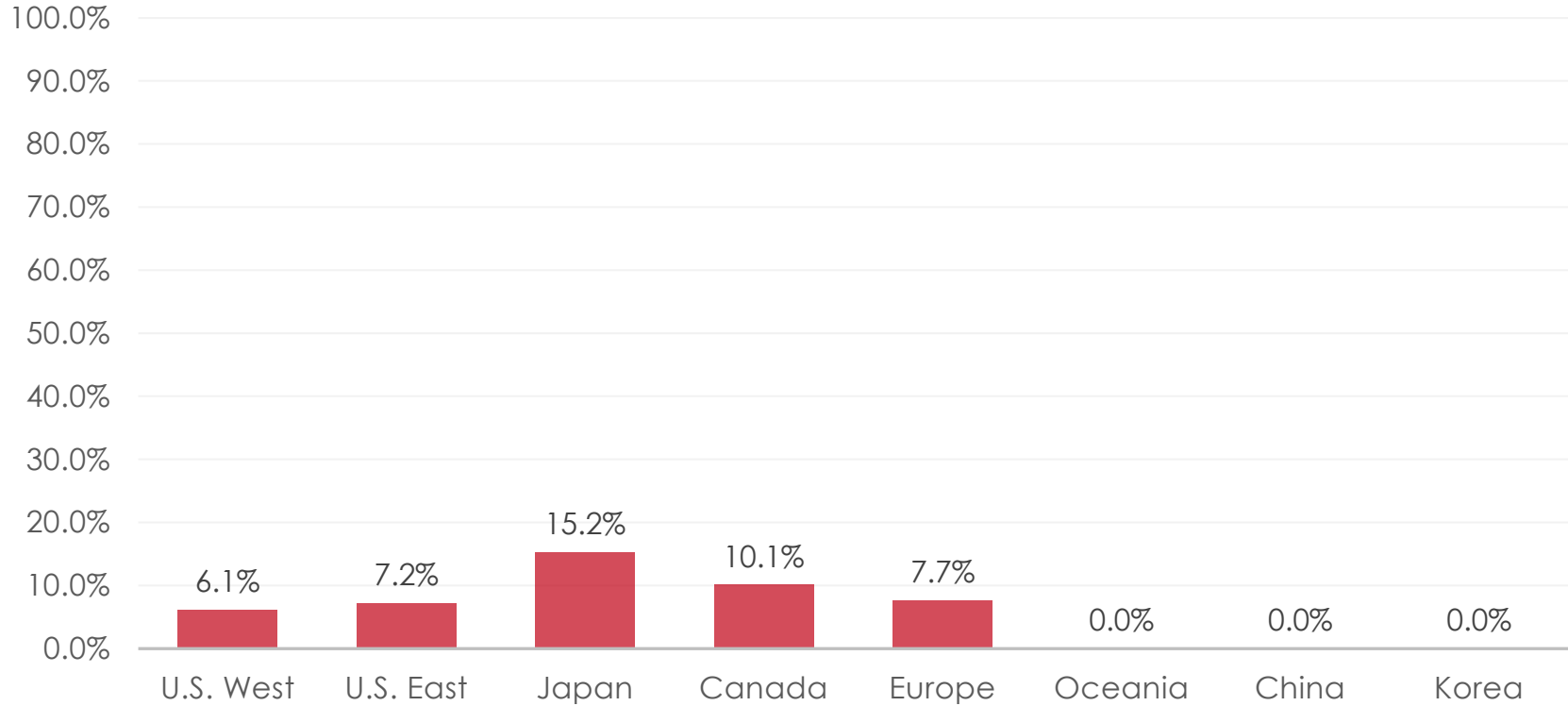
Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# IMPACT OF SOCIAL MEDIA POST/ VIDEO – MAUI



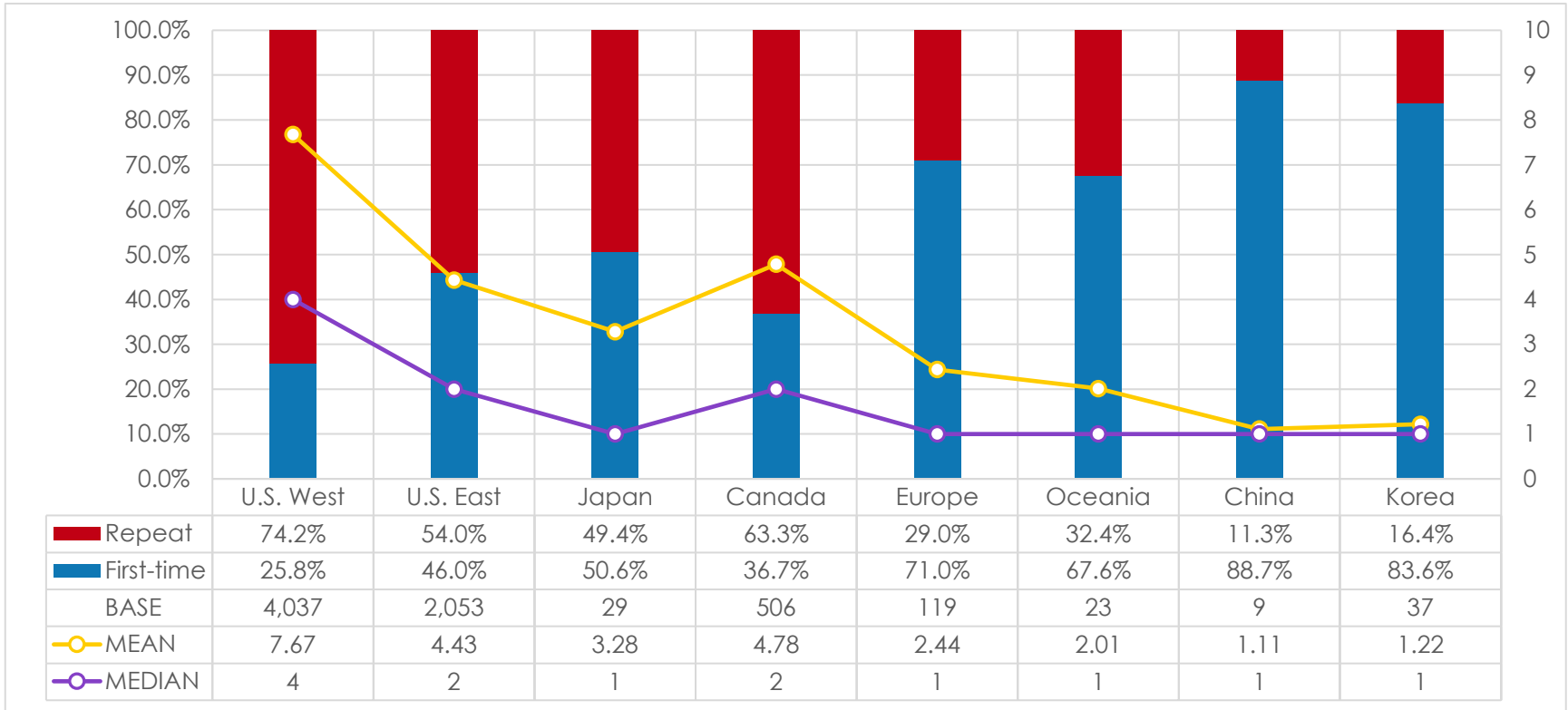
Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# IMPACT OF HAWAIIAN MUSIC – MAUI



Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# 1<sup>ST</sup> TIME VS REPEAT VISITOR - MAUI



# 1<sup>ST</sup> TIME VS REPEAT VISITOR - MAUI

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- Male respondents from both U.S. West and U.S. East were more frequent travelers for Maui than females from these two markets.
- Visitors from Canada without a college degree were more frequent travelers to Maui than were more educated travelers from this visitor market.
- More affluent travelers from U.S. West and U.S. East have traveled to Maui more frequently.
- Visitors from U.S. West, U.S. East, and Canada who visited just Maui on their most recent trip have been more frequent travelers to the island than were visitors whose trip included stops at multiple islands.
- Those in larger travel parties from both U.S. West and U.S. East have traveled to Maui fewer times in the past.

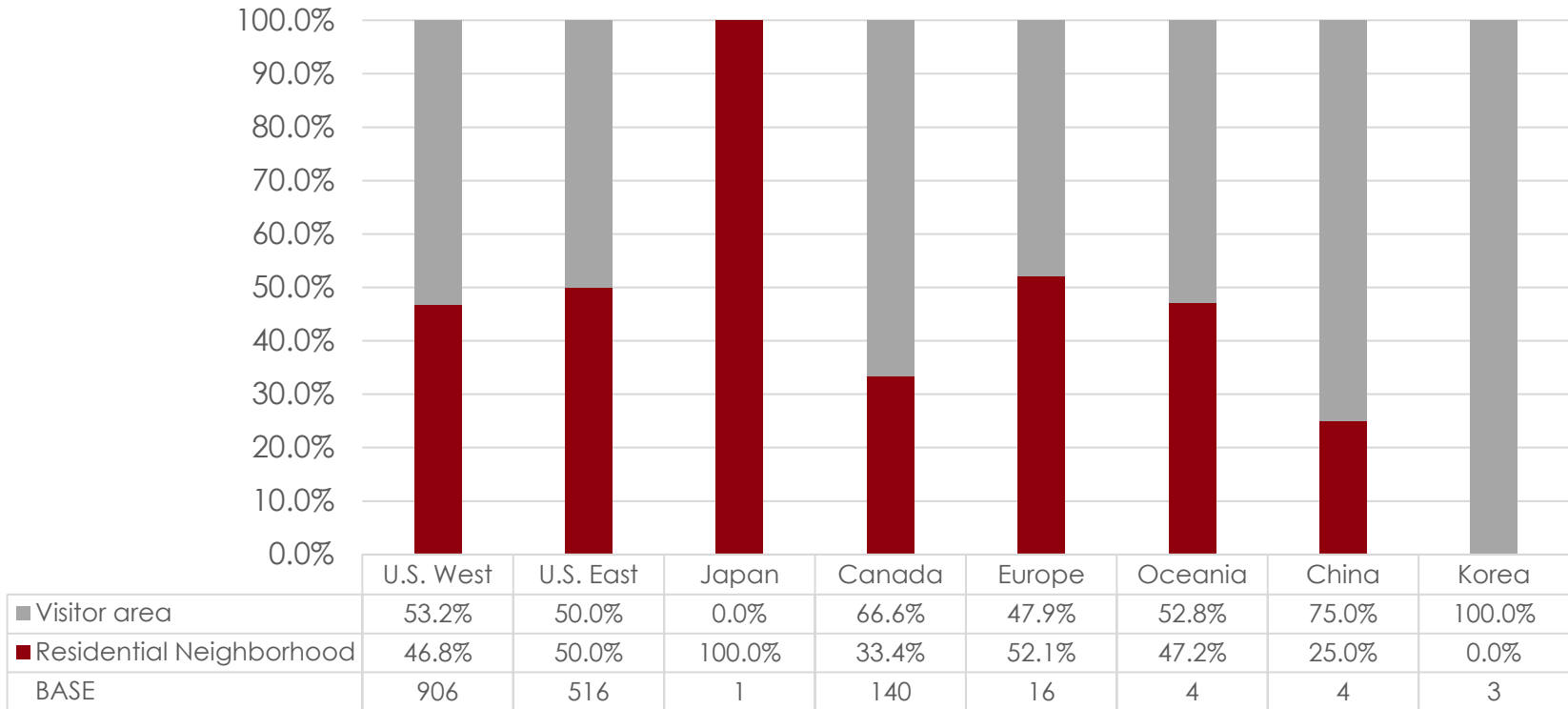
# ACCOMMODATIONS - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Hotel/ resort/ villa	36.7%	43.7%	65.8%	31.4%	59.1%	48.5%	44.7%	62.1%
Condominium	28.6%	23.3%	7.6%	35.9%	12.0%	12.2%	11.1%	2.7%
Vacation rental (includes Airbnb, VRBO, etc.)	18.7%	19.7%	0.0%	24.9%	9.7%	17.2%	44.3%	5.4%
Timeshare Unit	19.8%	14.4%	0.0%	10.2%	6.7%	0.0%	0.0%	0.0%
Stayed with friends or relatives	9.1%	10.3%	3.8%	5.5%	4.7%	0.0%	0.0%	2.7%
Own property/ 2nd home	3.8%	1.4%	0.0%	1.0%	1.6%	0.0%	0.0%	0.0%
Private Room in Private Home	2.2%	3.1%	0.0%	0.8%	1.8%	0.0%	11.1%	0.0%
Rental House	2.0%	2.3%	0.0%	2.1%	2.9%	0.0%	0.0%	0.0%
Hostel	0.7%	1.4%	2.5%	1.6%	7.8%	9.1%	0.0%	2.7%
Camp Site, Beach	0.9%	0.9%	0.0%	2.6%	2.6%	0.0%	0.0%	0.0%
Day trip/ Did not stay overnight	0.5%	0.8%	13.9%	1.2%	0.9%	8.1%	0.0%	21.7%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# ACCOMMODATIONS - MAUI

Vacation rental/ Rental house/ Private room/ Shared room



# ACCOMMODATIONS - MAUI

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	40.4%	38.4%	0.0%	43.9%	35.9%	0.0%	0.0%	0.0%
Price/ value/ best deal	19.4%	20.7%	0.0%	20.3%	32.0%	70.7%	75.0%	66.7%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	14.6%	13.4%	0.0%	15.1%	13.4%	0.0%	25.0%	0.0%
Owned by self, friend or relative	12.8%	13.2%	100.0%	4.3%	0.0%	0.0%	0.0%	0.0%
Ability to have travel party members stay together	4.4%	5.2%	0.0%	6.4%	0.0%	29.3%	0.0%	0.0%
Recommended friends/ family	3.6%	3.9%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%
Availability	3.3%	2.9%	0.0%	4.4%	13.4%	0.0%	0.0%	33.3%
No choice/ part of pkg	0.6%	0.4%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents



# STRENGTHS/ POSITIVE ASPECTS - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Beach/ ocean	31.7%	20.4%	20.2%	25.6%	14.4%	8.1%	0.0%	16.3%
Nature/ natural beauty/ scenery	18.7%	25.6%	40.6%	24.8%	43.7%	30.3%	33.2%	43.3%
Variety of activities/ attractions/ many choices	9.5%	15.6%	11.4%	11.8%	9.2%	17.2%	44.5%	24.3%
Feeling of the "Aloha Spirit"	9.5%	10.4%	2.5%	11.0%	10.5%	14.1%	0.0%	0.0%
Overall customer service/ hospitality/ the people	6.3%	5.6%	2.5%	4.2%	4.0%	18.2%	0.0%	8.1%
Events/ celebrations with friends/ family	3.8%	4.2%	3.8%	3.7%	2.6%	0.0%	0.0%	0.0%
Local culture/ people/ music	3.4%	3.7%	3.8%	3.3%	4.4%	4.1%	0.0%	5.4%
Food/ restaurant variety/ dining options	3.7%	2.9%	2.5%	2.2%	0.0%	0.0%	0.0%	0.0%
Accommodations/ was as promised	2.9%	2.4%	0.0%	3.4%	0.7%	4.1%	0.0%	0.0%
Feeling safe (able to walk at night)	1.2%	1.0%	0.0%	3.1%	0.7%	0.0%	11.1%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# STRENGTHS/ POSITIVE ASPECTS - MAUI

- Visitors from U.S. West and U.S. East in larger travel parties were more likely to mention the beaches and oceans as highlights of their trip. Those traveling in packs or two or couples mention the island's natural beauty in greater numbers.
- Male visitors from U.S. West were more likely to select the variety of attractions and activities as strengths of their trip while females from this visitor market were more likely to mention the aloha spirit as a positive aspect of their time on Maui.
- More educated travelers or those with a college degree from both U.S. West and U.S. East were more likely to list Maui's natural beauty and variety of activities as strengths of their trip. Less educated visitors from U.S. West enjoyed the aloha spirit and solid customer service in higher numbers.
- More affluent visitors from U.S. West were more likely to list restaurants and dining options as strengths of their trip while less affluent travelers from this market felt Maui's natural beauty and local culture and people were highlights.
- First-time visitors from both U.S. West and U.S. East were more likely to list Maui's natural beauty and the variety of activities on the island as strengths of their trip while repeat visitors were more likely to appreciate the island's beaches and ocean.

# AREAS OF OPPORTUNITIES - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	47.8%	47.5%	44.3%	46.6%	51.0%	52.5%	44.3%	43.2%
COVID 19	10.9%	8.1%	0.0%	0.6%	1.6%	0.0%	0.0%	0.0%
Food/ restaurant variety/ dining options	9.2%	7.1%	6.3%	3.2%	4.2%	8.1%	11.1%	5.4%
Would like to experience more local culture	7.4%	8.7%	13.9%	7.3%	3.5%	10.1%	0.0%	2.7%
Traffic (congested/slow)	3.2%	4.3%	0.0%	11.5%	6.2%	4.1%	0.0%	2.7%
Driving experience (signage, road surface, traffic violations, bad drivers)	3.4%	4.5%	11.4%	5.2%	4.2%	4.1%	22.5%	0.0%
Variety of activities/ attractions	3.2%	2.7%	3.8%	1.4%	0.0%	0.0%	0.0%	5.4%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	2.4%	3.0%	0.0%	2.9%	0.0%	0.0%	0.0%	5.4%
Cost/Expensive (specific/non specific)	1.2%	1.4%	0.0%	8.9%	6.3%	8.1%	0.0%	0.0%

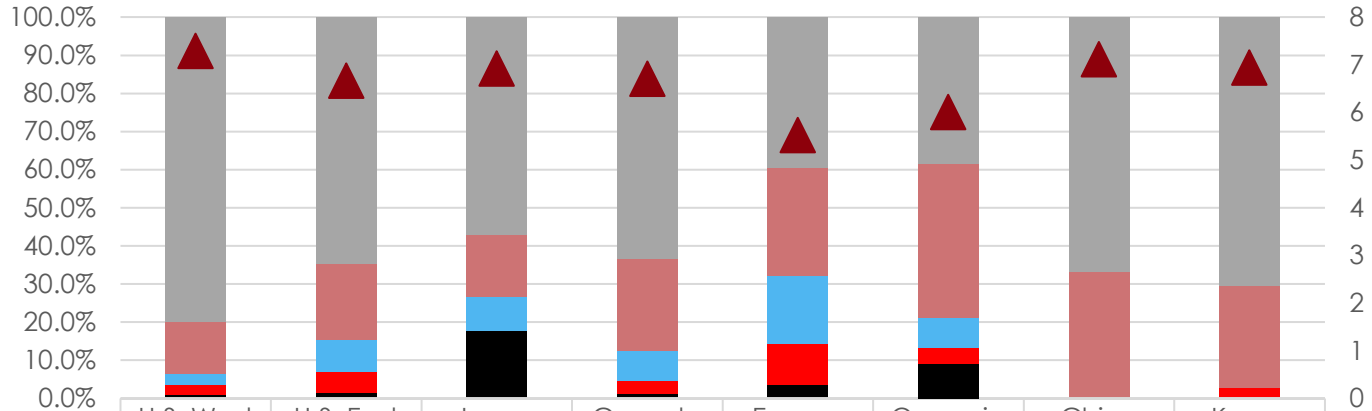
Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

# AREAS OF OPPORTUNITIES - MAUI

- Male visitors from U.S. West were more likely to list issues related to the pandemic when asked about issues they faced while on Maui. A negative driving experience was also something males from this market took issue with in greater numbers.
- Younger travelers from both U.S. West and U.S. East felt their experience on Maui would have been better if they were exposed more to local culture.
- Visitors over the age of 50 from both U.S. West and U.S. East listed issues related to COVID as hampering their overall experience on Maui.
- More affluent visitors from U.S. West felt that COVID and improvements to the overall dining experience could have been improved upon. Less affluent visitors from U.S. West felt that more exposure to local culture was needed.
- Repeat visitors from both U.S. West and U.S. East felt the effects of the pandemic diminished their overall experience on Maui. First-time visitors from this region would have liked to experience more local culture.

# LIKELIHOOD OF RETURN VISIT – MAUI

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	79.9%	64.6%	57.0%	63.3%	39.4%	38.4%	66.8%	70.3%
Somewhat likely (5-6)	13.7%	20.2%	16.4%	24.4%	28.4%	40.4%	33.2%	27.0%
Somewhat unlikely (3-4)	2.9%	8.2%	8.8%	7.9%	17.9%	8.1%	0.0%	0.0%
Very unlikely (1-2)	2.5%	5.5%	0.0%	3.4%	10.7%	4.1%	0.0%	2.7%
Not sure	1.1%	1.6%	17.7%	1.1%	3.7%	9.1%	0.0%	0.0%
BASE	4035	2052	29	506	118	23	9	37
MEAN	7.29	6.66	6.92	6.70	5.53	6.01	7.11	6.94

# LIKELIHOOD OF RETURN VISIT – MAUI

## SEGMENTATION BASED ON DIFFERENCES IN MEAN SCORES

- When segmented by gender we find female visitors from U.S. West with a greater likelihood of returning to Maui than males.
- Amongst travelers from U.S. West those under 35 appear to be the least likely to return to Maui in the next five years.
- Less educated visitors or those without a college degree from U.S. West and Canada gave higher mean scores indicating a greater likelihood of returning to Maui within the next five years.
- More affluent travelers from U.S. West show a stronger likelihood of returning to Maui in the next five years.
- Visitors from U.S. West, U.S. East., and Canada whose trip consisted of multi-island visits were less likely to return to Maui.
- Those who traveled to Maui alone from U.S. West, U.S. East, and Canada were more likely to return to the island compared to those who traveled with others on their trip.

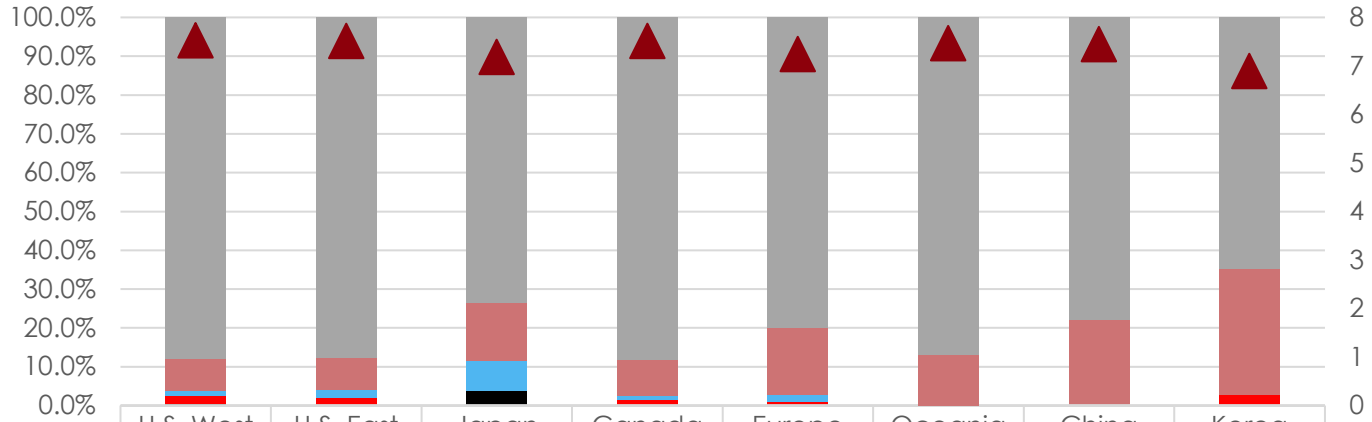
# REASONS FOR NOT RETURNING - MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	40.2%	45.0%	61.9%	55.4%	31.5%	42.8%	0.0%	0.0%
Too expensive/cost	16.8%	34.1%	9.5%	41.5%	41.1%	19.1%	0.0%	0.0%
Flight too long	4.4%	22.6%	0.0%	13.6%	41.1%	0.0%	0.0%	0.0%
No reason to return/ nothing new	16.1%	11.8%	9.5%	6.3%	14.3%	0.0%	0.0%	0.0%
Unfriendly people/ felt unwelcome	17.6%	8.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%
Not enough value for the price	10.8%	8.9%	0.0%	15.3%	2.9%	19.1%	0.0%	0.0%
COVID 19	11.6%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other financial obligations	2.7%	8.3%	23.8%	11.9%	8.6%	0.0%	0.0%	0.0%
Too commercial/ overdeveloped	6.0%	6.4%	0.0%	6.3%	2.3%	19.1%	0.0%	0.0%
Too crowded/ congested/ traffic	4.6%	4.8%	0.0%	9.4%	0.0%	0.0%	0.0%	0.0%
Poor service	6.1%	3.5%	0.0%	3.1%	0.0%	0.0%	0.0%	100.0%
Poor health/ age restriction	2.1%	3.8%	14.3%	1.7%	8.6%	19.1%	0.0%	0.0%

Caution small base: Japan, Canada, Europe, Oceania, China, and Korea less than 100 respondents

# MAUI - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	87.8%	87.7%	73.4%	88.3%	80.0%	86.9%	77.9%	64.9%
■ Somewhat likely (5-6)	8.5%	8.5%	15.2%	9.0%	17.2%	13.1%	22.1%	32.4%
■ Somewhat unlikely (3-4)	1.2%	1.8%	7.6%	1.3%	1.8%	0.0%	0.0%	0.0%
■ Very unlikely (1-2)	1.9%	1.6%	0.0%	1.4%	0.9%	0.0%	0.0%	2.7%
■ Not sure	0.6%	0.3%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	4,035	2,051	29	504	118	23	9	37
▲ MEAN	7.52	7.51	7.18	7.51	7.25	7.47	7.45	6.89



# MAUI ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.3%	95.4%	93.7%	96.2%	94.1%	87.8%	100.0%	100.0%
<b>On own (self guided)</b>	81.3%	83.9%	58.2%	86.1%	76.5%	46.5%	88.9%	83.7%
<b>Helicopter/ airplane</b>	1.8%	3.9%	0.0%	3.0%	11.0%	0.0%	0.0%	0.0%
<b>Boat/ submarine/ whale</b>	30.4%	42.6%	17.7%	40.5%	48.7%	39.4%	33.2%	21.6%
<b>Visit towns</b>	48.0%	55.1%	31.7%	61.4%	51.5%	54.5%	33.4%	32.4%
<b>Limo/ van/ bus tour</b>	2.4%	6.9%	12.6%	7.2%	7.9%	28.2%	0.0%	10.8%
<b>Scenic views/ natural landmark</b>	51.2%	65.5%	27.9%	62.9%	60.6%	40.4%	77.7%	59.5%
<b>Movie/ TV/ film location</b>	0.3%	1.2%	0.0%	0.6%	1.6%	0.0%	22.1%	8.1%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# MAUI ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.9%	96.6%	89.9%	98.2%	96.7%	91.9%	100.0%	97.3%
<b>Beach/ sunbathing</b>	88.7%	88.2%	69.6%	92.0%	76.5%	60.6%	88.7%	83.7%
<b>Bodyboard</b>	16.7%	9.5%	3.8%	13.8%	1.5%	0.0%	0.0%	2.7%
<b>Standup paddle board</b>	9.2%	6.6%	3.8%	3.7%	1.5%	0.0%	0.0%	2.7%
<b>Surfing</b>	9.6%	9.5%	0.0%	6.6%	4.2%	0.0%	0.0%	8.1%
<b>Canoeing/ kayak</b>	5.2%	5.0%	0.0%	5.0%	7.0%	0.0%	0.0%	0.0%
<b>Swim ocean</b>	73.8%	70.0%	39.3%	72.7%	66.8%	63.7%	44.3%	35.1%
<b>Snorkel</b>	59.6%	53.9%	17.7%	49.1%	40.6%	42.5%	44.3%	45.8%
<b>Freediving</b>	2.9%	2.7%	0.0%	1.2%	1.6%	0.0%	11.1%	0.0%
<b>Windsurf/ Kitesurf</b>	0.7%	0.6%	0.0%	0.6%	1.5%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	2.3%	1.7%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	5.2%	4.5%	0.0%	4.5%	4.4%	0.0%	0.0%	0.0%
<b>Fishing</b>	4.0%	2.9%	0.0%	1.6%	0.9%	0.0%	0.0%	0.0%
<b>Golf</b>	10.3%	10.3%	7.6%	13.2%	1.6%	4.1%	0.0%	5.4%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# MAUI ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.9%	96.6%	89.9%	98.2%	96.7%	91.9%	100.0%	97.3%
<b>Run/ Jog/ Fitness walk</b>	44.6%	37.8%	30.4%	41.9%	24.5%	25.3%	44.5%	10.8%
<b>Spa</b>	8.6%	8.4%	8.8%	4.9%	10.7%	0.0%	11.1%	2.7%
<b>Hiking</b>	43.7%	49.0%	27.9%	34.3%	34.2%	18.2%	44.3%	32.5%
<b>Backpack/Camping</b>	1.9%	2.1%	0.0%	4.0%	2.6%	5.0%	11.1%	0.0%
<b>Agritourism</b>	6.2%	8.3%	12.6%	6.4%	2.8%	5.0%	22.1%	8.1%
<b>Sport event/ tournament</b>	0.7%	1.3%	0.0%	2.6%	0.9%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	24.3%	33.7%	19.0%	33.2%	31.4%	23.2%	22.3%	21.6%
<b>Waterpark</b>	0.4%	0.5%	6.3%	0.2%	0.7%	0.0%	0.0%	5.4%
<b>Mountain tube/ waterfall rappel</b>	0.5%	1.1%	0.0%	0.8%	1.8%	0.0%	0.0%	2.7%
<b>Zip lining</b>	3.9%	3.0%	0.0%	1.6%	0.0%	4.1%	0.0%	0.0%
<b>Skydiving</b>	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	2.7%
<b>All terrain vehicle (ATV)</b>	1.1%	1.9%	0.0%	0.4%	2.8%	0.0%	22.1%	0.0%
<b>Horseback riding</b>	1.3%	1.7%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%

555 Q During this trip, which of the following activities did you participate in?

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents



# MAUI ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	98.3%	97.8%	92.4%	99.2%	97.4%	90.9%	100.0%	94.5%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.3%	26.4%	11.4%	19.0%	26.2%	13.1%	44.5%	32.4%
<b>Live music/ stage show</b>	11.7%	19.1%	17.7%	26.4%	25.9%	31.3%	0.0%	2.7%
<b>Nightclub/ dancing/ bar/ karaoke</b>	4.5%	6.1%	0.0%	4.0%	7.4%	8.1%	0.0%	0.0%
<b>Fine dining</b>	52.9%	55.2%	31.7%	51.4%	46.9%	26.3%	33.2%	35.1%
<b>Family restaurant</b>	58.0%	54.9%	22.8%	64.7%	31.0%	54.6%	0.0%	18.9%
<b>Fast food</b>	30.1%	31.7%	44.3%	38.6%	34.3%	27.2%	44.3%	40.5%
<b>Food truck</b>	36.9%	38.4%	26.6%	30.7%	23.0%	19.1%	22.1%	45.9%
<b>Café/ coffee house</b>	40.5%	40.2%	49.4%	50.7%	45.9%	70.7%	11.1%	37.7%
<b>Ethnic dining</b>	20.8%	23.7%	13.9%	18.7%	16.5%	13.1%	55.5%	18.9%
<b>Prepared own meal</b>	69.2%	58.0%	20.2%	71.8%	39.2%	34.4%	33.2%	10.8%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# MAUI ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.0%	94.9%	92.4%	97.9%	95.8%	86.9%	100.0%	94.6%
<b>Mall/ department store</b>	34.8%	32.8%	64.5%	50.9%	45.3%	42.5%	55.5%	51.3%
<b>Designer boutique</b>	16.3%	18.7%	17.7%	20.7%	11.0%	21.2%	11.1%	2.7%
<b>Hotel/ resort store</b>	22.8%	28.5%	27.9%	26.6%	31.6%	31.3%	22.1%	16.2%
<b>Swap meet/ flea market</b>	7.9%	9.4%	0.0%	20.6%	6.8%	0.0%	11.1%	2.7%
<b>Discount/ outlet store</b>	15.9%	16.5%	24.0%	29.8%	14.8%	25.3%	44.5%	43.3%
<b>Supermarket</b>	77.1%	71.3%	65.8%	79.9%	68.2%	60.6%	66.6%	45.9%
<b>Farmer's market</b>	27.7%	25.7%	13.9%	36.7%	19.1%	12.2%	22.1%	5.5%
<b>Convenience store</b>	45.6%	46.2%	34.2%	54.6%	30.9%	46.5%	44.3%	43.3%
<b>Duty free store</b>	1.2%	1.8%	12.6%	2.5%	6.5%	0.0%	33.4%	24.3%
<b>Local shop/ artisan</b>	59.1%	65.3%	29.1%	69.5%	55.2%	56.6%	11.1%	24.4%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# MAUI ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	36.7%	51.1%	74.7%	61.5%	57.6%	53.5%	55.5%	56.7%
<b>Historic military site</b>	2.4%	3.6%	17.7%	2.7%	3.5%	5.0%	22.1%	5.4%
<b>Other historical site</b>	15.4%	19.9%	27.9%	20.1%	14.9%	13.1%	22.3%	29.8%
<b>Museum/ art gallery</b>	10.1%	12.2%	0.0%	18.6%	13.8%	17.2%	22.1%	2.7%
<b>Luau/ Polynesian show/ hula show</b>	6.8%	16.5%	15.2%	26.3%	20.4%	27.2%	0.0%	13.5%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.2%	3.4%	13.9%	5.4%	6.6%	9.1%	0.0%	2.7%
<b>Play/ concert/ theatre</b>	0.9%	1.4%	0.0%	4.9%	5.1%	0.0%	0.0%	5.4%
<b>Art/ craft fair</b>	7.9%	9.5%	0.0%	15.2%	9.9%	9.1%	11.1%	2.7%
<b>Festival event</b>	4.1%	4.5%	17.7%	4.0%	4.9%	0.0%	0.0%	0.0%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# MAUI ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.5%	90.8%	92.4%	97.4%	97.6%	100.0%	100.0%	100.0%
<b>Airport shuttle</b>	5.1%	5.6%	11.4%	11.3%	22.6%	28.2%	11.3%	10.8%
<b>Trolley</b>	2.7%	3.1%	16.4%	6.2%	0.0%	0.0%	0.0%	5.4%
<b>Public bus</b>	1.0%	1.7%	0.0%	4.9%	6.3%	8.1%	0.0%	2.7%
<b>Tour bus/ tour van</b>	1.8%	6.6%	24.0%	7.7%	11.4%	36.3%	0.0%	19.0%
<b>Taxi/ limo</b>	3.9%	5.6%	24.0%	7.3%	12.7%	18.2%	0.0%	16.3%
<b>Rental car</b>	85.1%	81.7%	54.5%	89.4%	78.1%	50.6%	100.0%	78.3%
<b>Ride share</b>	9.1%	11.5%	2.5%	6.5%	15.7%	26.3%	0.0%	5.4%
<b>Bicycle rental</b>	2.0%	2.5%	0.0%	3.4%	2.4%	0.0%	0.0%	2.7%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

## MAUI ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	25.7%	22.9%	25.3%	23.8%	13.2%	4.1%	11.1%	8.2%
Visit friends/ family	25.4%	22.5%	25.3%	23.1%	11.3%	4.1%	11.1%	8.2%
Volunteer non profit	0.8%	0.9%	0.0%	0.8%	1.8%	0.0%	0.0%	0.0%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

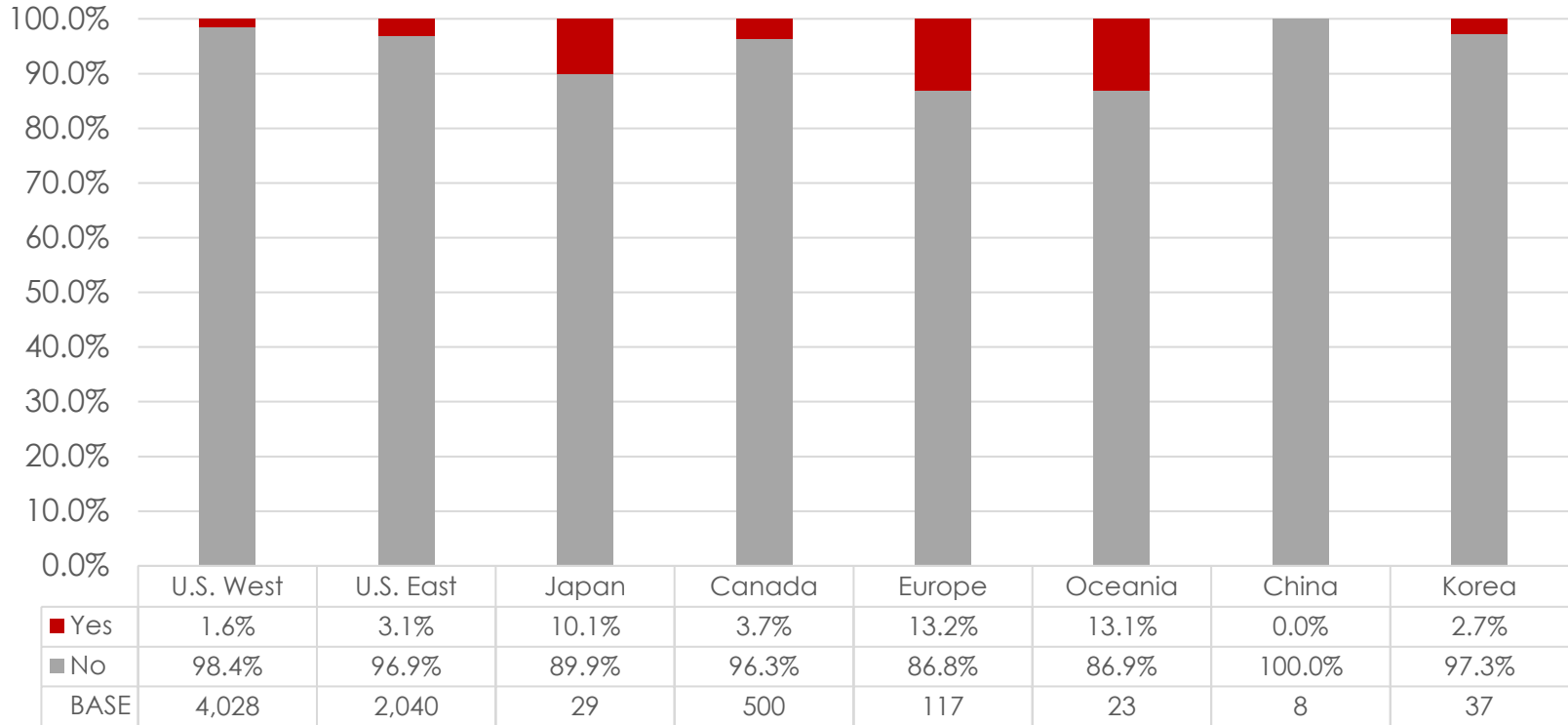


## ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	1.3%	1.0%	0.0%	3.5%	0.9%	0.0%	0.0%	0.0%
Aquarium Maui /Maui Ocean Center	4.0%	8.1%	6.3%	24.7%	16.0%	13.1%	11.1%	0.0%
Baldwin Missionary Home Museum	2.5%	2.1%	0.0%	5.6%	3.5%	8.1%	0.0%	0.0%
Hale Pa'i Printing House	0.2%	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Haleakala National Park	28.8%	45.2%	38.0%	35.1%	42.8%	27.2%	66.8%	67.6%
Haleki'i-Pihana Heiau State Monument	1.7%	2.7%	6.3%	1.1%	6.1%	0.0%	0.0%	5.4%
Hana Cultural Center	5.3%	10.5%	7.6%	9.1%	16.7%	8.1%	33.6%	5.4%
'Iao Valley State Monument	11.0%	13.3%	21.5%	13.9%	15.4%	8.1%	11.1%	13.6%
Kepanaiwai Park/ Heritage Gardens	2.8%	5.5%	0.0%	4.3%	7.9%	4.1%	0.0%	0.0%
Kula Botanical Garden	5.0%	7.6%	10.1%	7.8%	12.3%	4.1%	0.0%	2.7%
Maui Historical Society Bailey House Museum	1.3%	1.4%	0.0%	2.4%	3.5%	13.1%	0.0%	0.0%
Whaler's Village Museum	7.2%	11.1%	11.4%	17.0%	16.3%	9.1%	22.3%	2.7%
Wo Hing Temple Museum	0.8%	1.5%	0.0%	1.8%	3.3%	4.1%	0.0%	0.0%

Caution small base: Japan, Oceania, China, and Korea less than 100 respondents

# VISITED MAUI FOR SPECIFIC EVENT



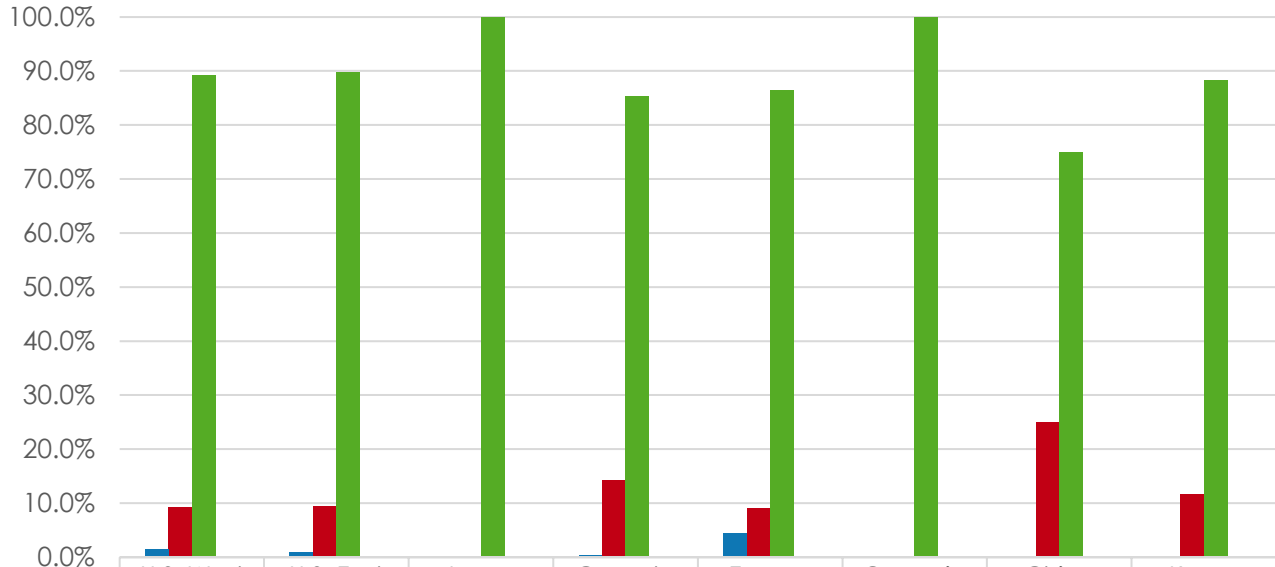
## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wedding/ Honeymoon/ Anniversary/Birthday/Funeral	39.6%	37.1%	0.0%	32.1%	0.0%	38.3%	0.0%	0.0%
Convention/Conference/ Retreat/Seminar/Meeting/ Workshop/Training	27.1%	22.6%	0.0%	31.1%	77.6%	61.7%	0.0%	0.0%
Other sporting event	9.4%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other (please specify festival/event name)	4.7%	6.4%	62.4%	0.0%	7.5%	0.0%	0.0%	0.0%
Other Festival/concert	4.7%	3.2%	37.6%	0.0%	7.5%	0.0%	0.0%	0.0%
Whale Watching	3.6%	8.1%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%
Maui Jim Maui Invitational	3.1%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	3.1%	1.6%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%

Caution small base: All markets less than 100 respondents

Q. Which festival/ event did you visit Maui to attend?

# SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other Response	1.5%	0.8%	0.0%	0.4%	4.5%	0.0%	0.0%	0.0%
Full-face snorkel mask	9.2%	9.5%	0.0%	14.3%	9.1%	0.0%	25.0%	11.7%
2-Piece, separate mask & snorkel	89.3%	89.7%	100.0%	85.3%	86.4%	100.0%	75.0%	88.3%
BASE	2,383	1,098	5	247	47	10	4	1

# SNORKELING EQUIPMENT USED – MAUI

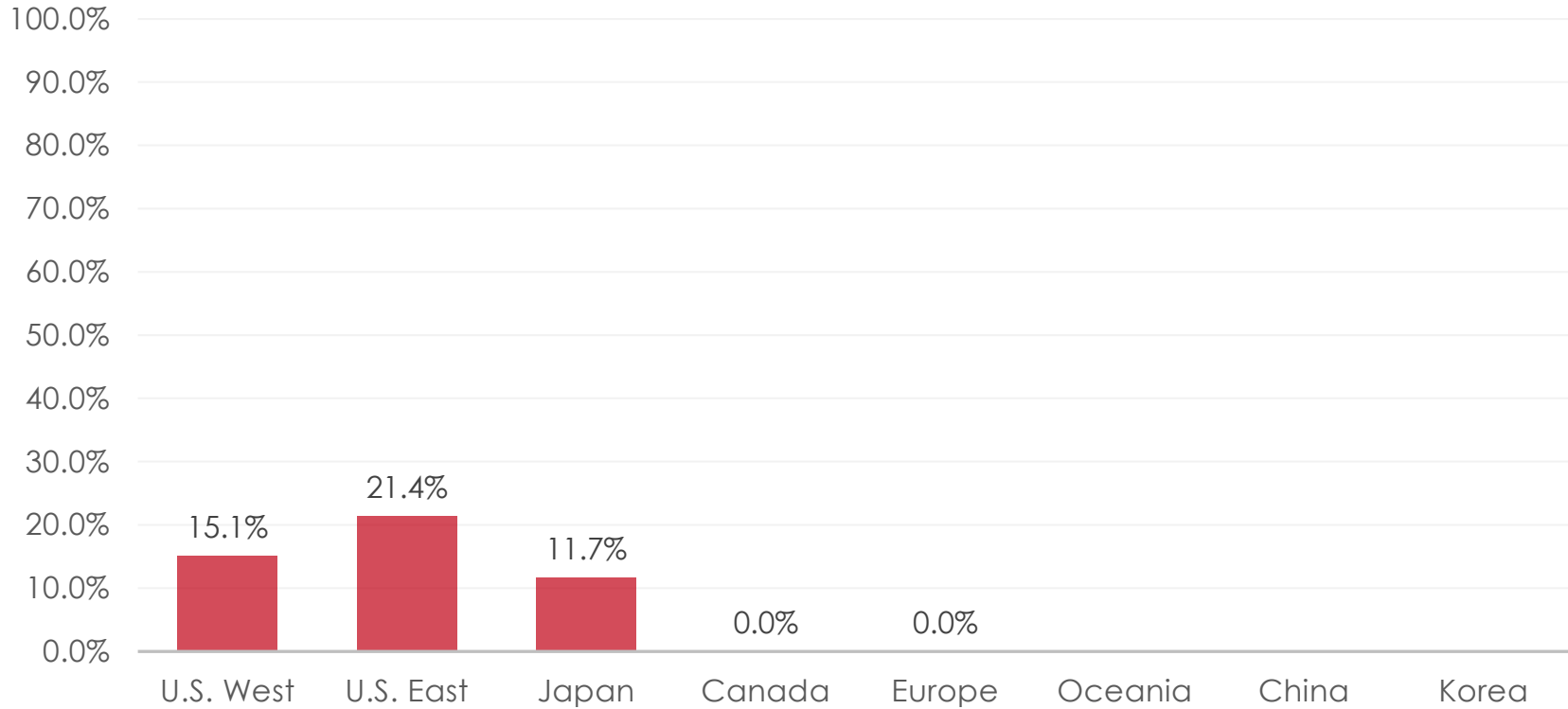
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	99.1%	97.9%	100.0%	99.2%	100.0%	100.0%	100.0%	94.1%
Yes, while using a 2 piece mask & snorkel	0.6%	1.4%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, while using a full face snorkel mask	0.1%	0.2%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.3%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – ISLAND OF MOLOKA‘I

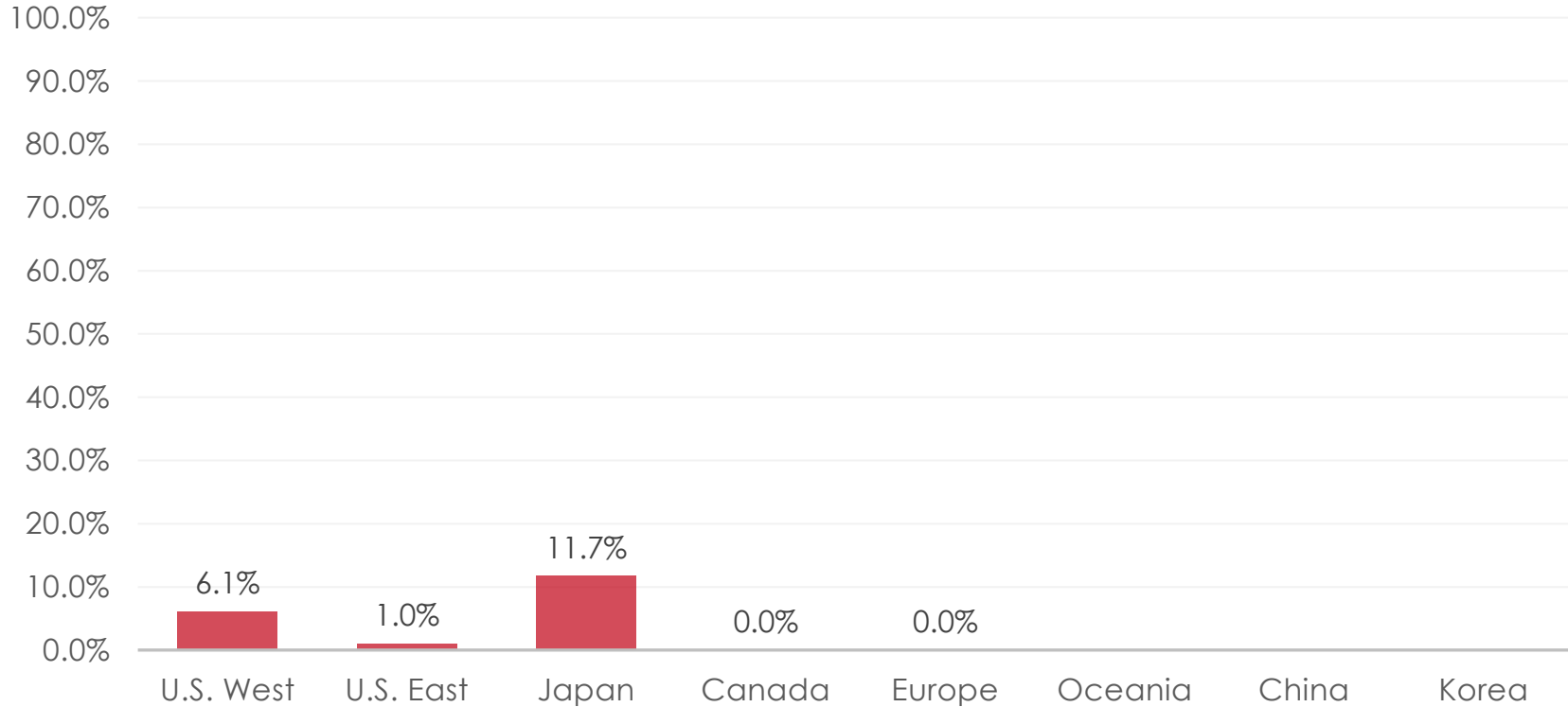
# AIDED ADVERTISING AWARENESS – MOLOKA'I



Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

567 Q. Do you remember seeing or hearing advertising for Moloka'i prior to your arrival?

# IMPACT OF LOCATION FILMING– MOLOKA‘I

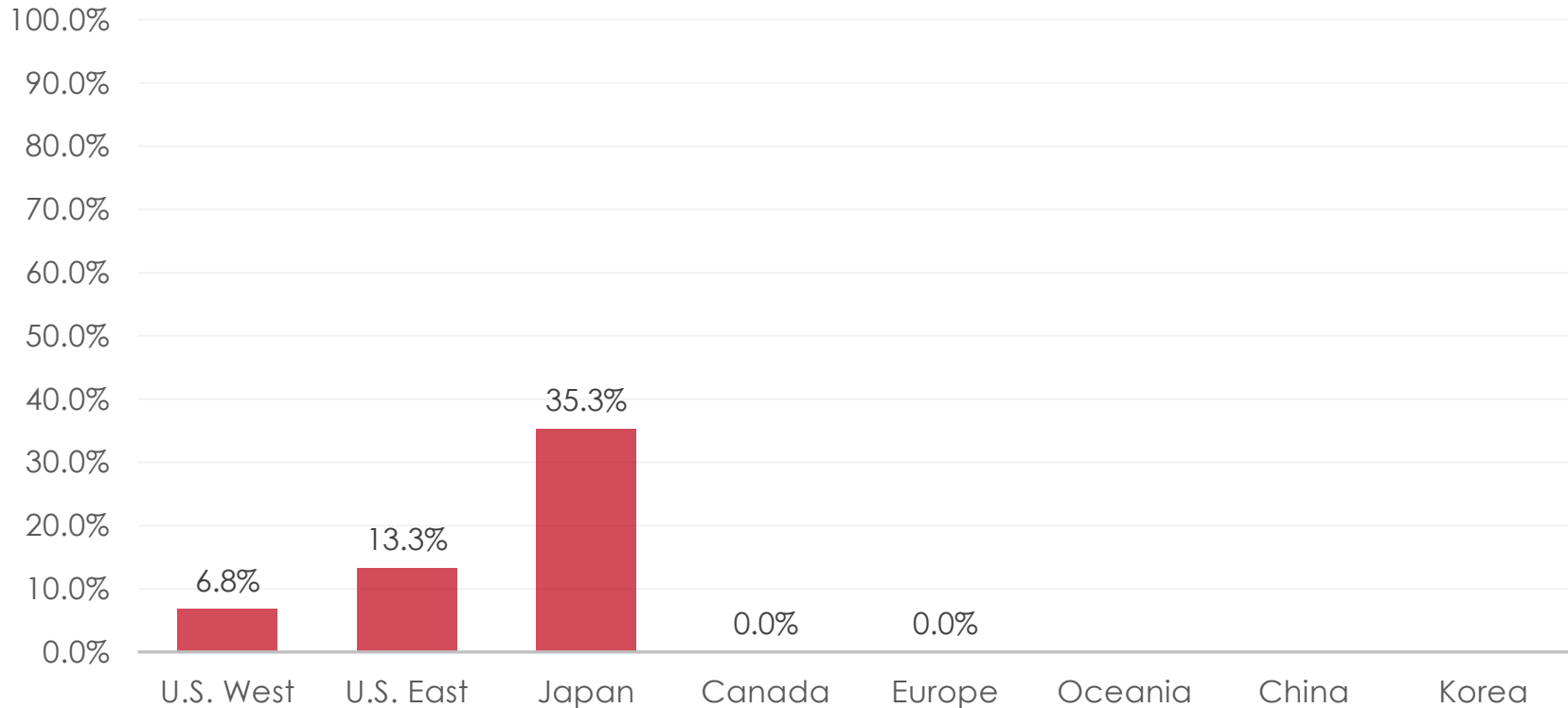


Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

568 Q. Which of the following, if any, motivated you to visit the Island of Moloka'i?

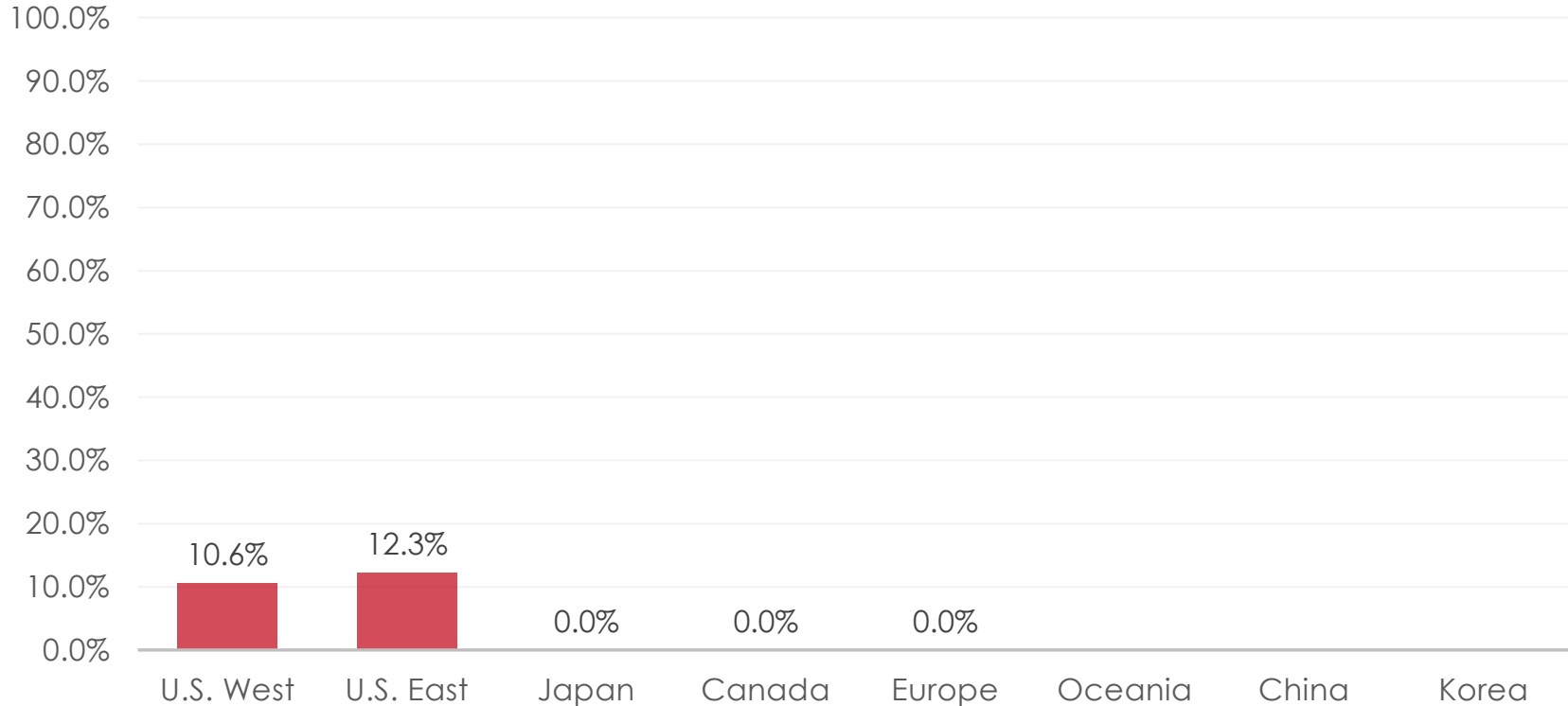


# IMPACT OF HAWAIIAN CULTURAL EVENT – MOLOKA‘I



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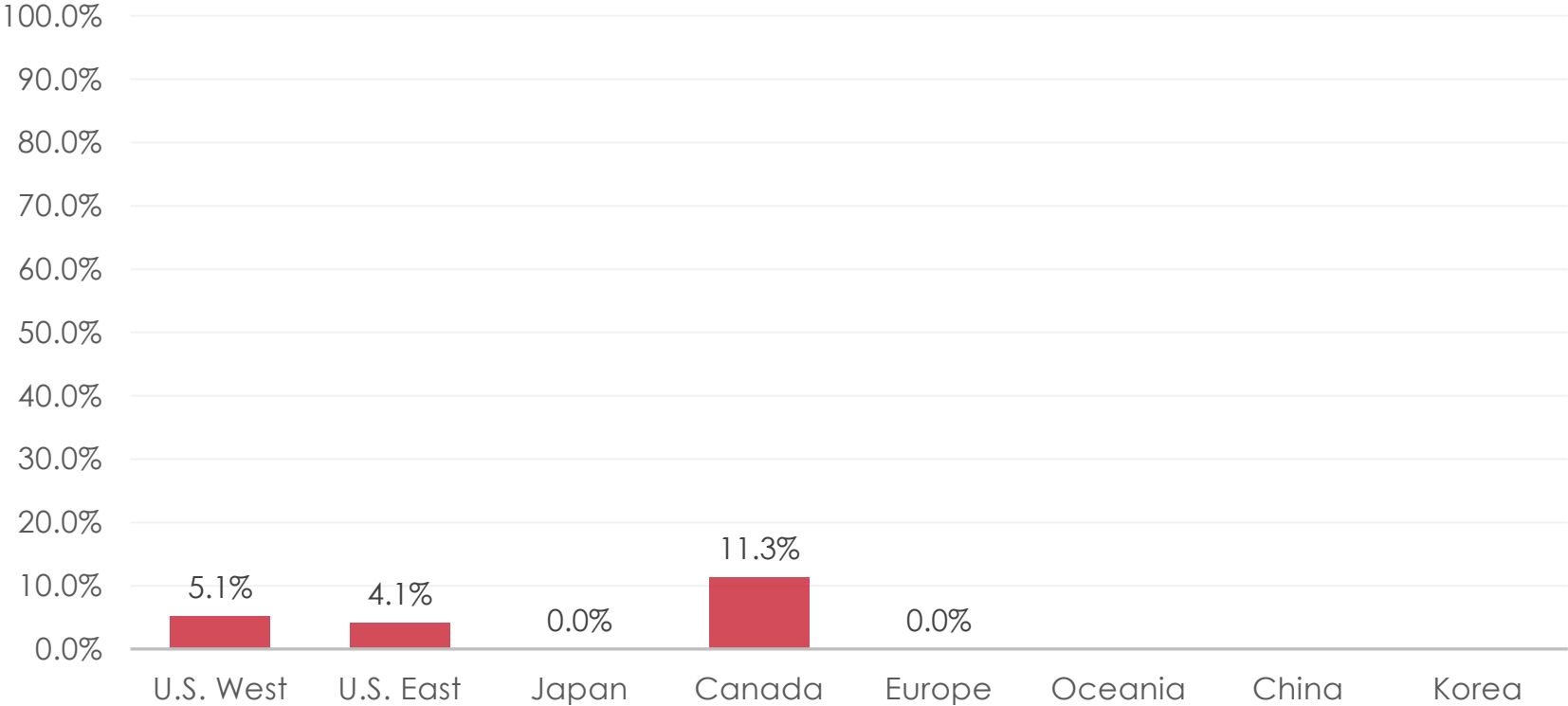
# IMPACT OF OUTDOOR/ SPORTING EVENT – MOLOKA‘I



Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

570 Q. Which of the following, if any, motivated you to visit the Island of Moloka'i?

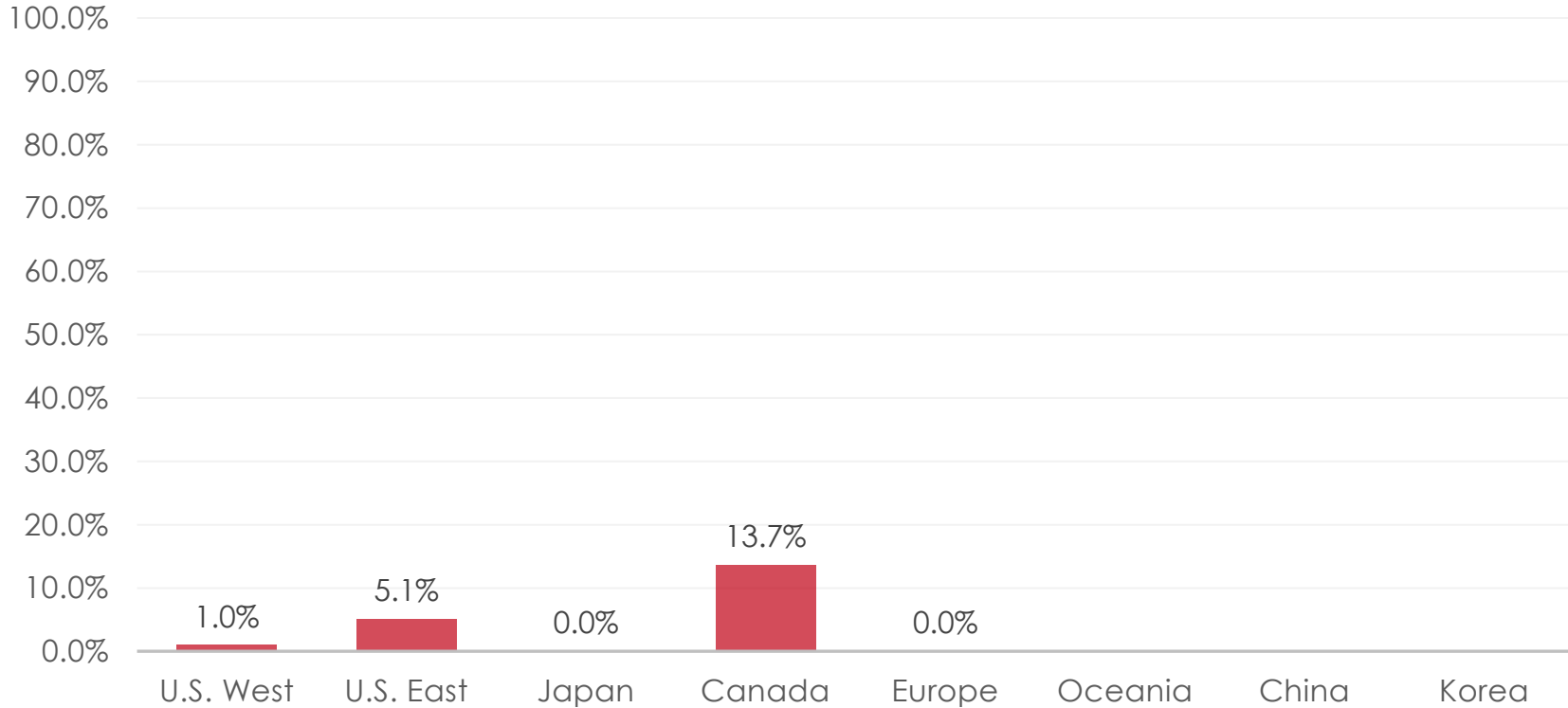
# IMPACT OF SOCIAL MEDIA POST/ VIDEO – MOLOKA'I



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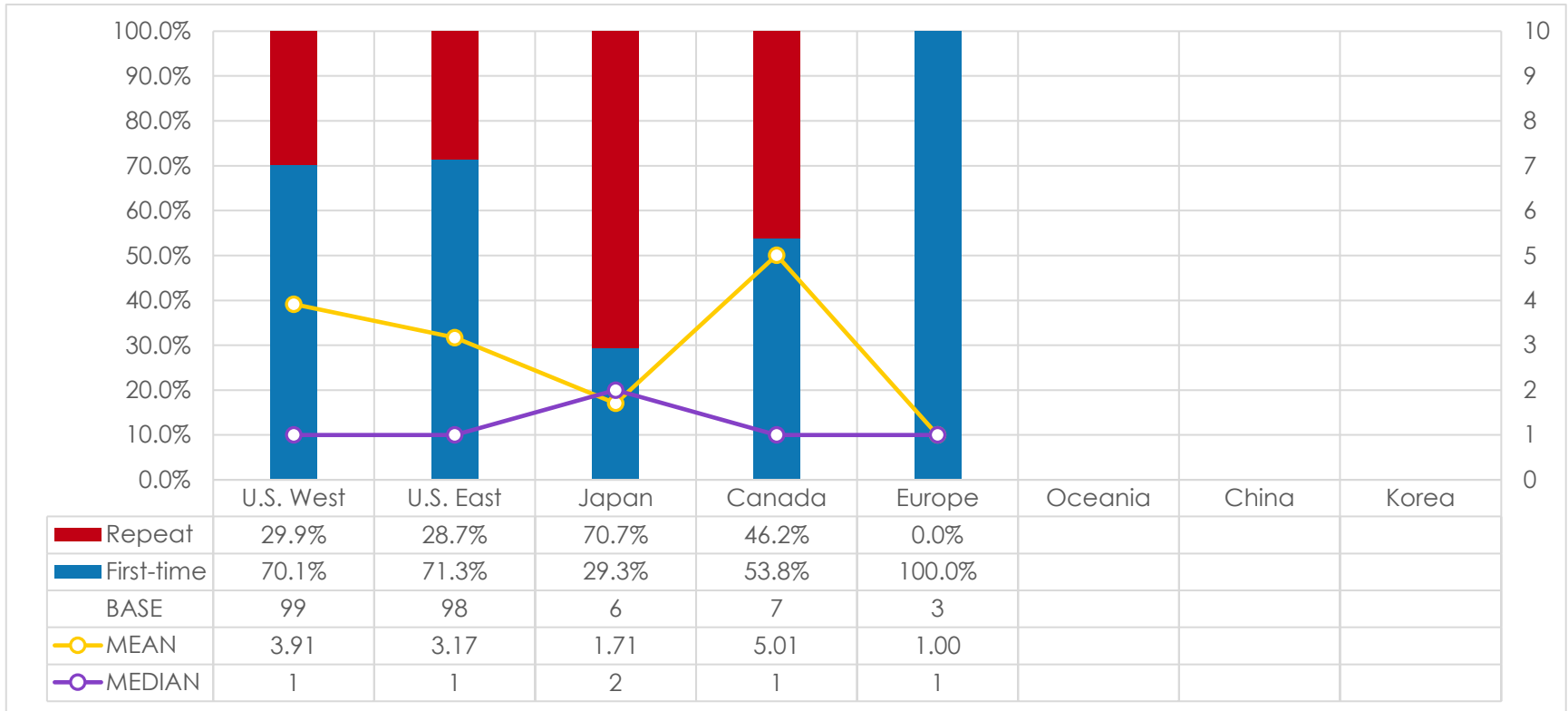
# IMPACT OF HAWAIIAN MUSIC – MOLOKA‘I



Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

572 Q. Which of the following, if any, motivated you to visit the Island of Moloka'i?

# 1<sup>ST</sup> TIME VS REPEAT VISITOR – MOLOKA‘I



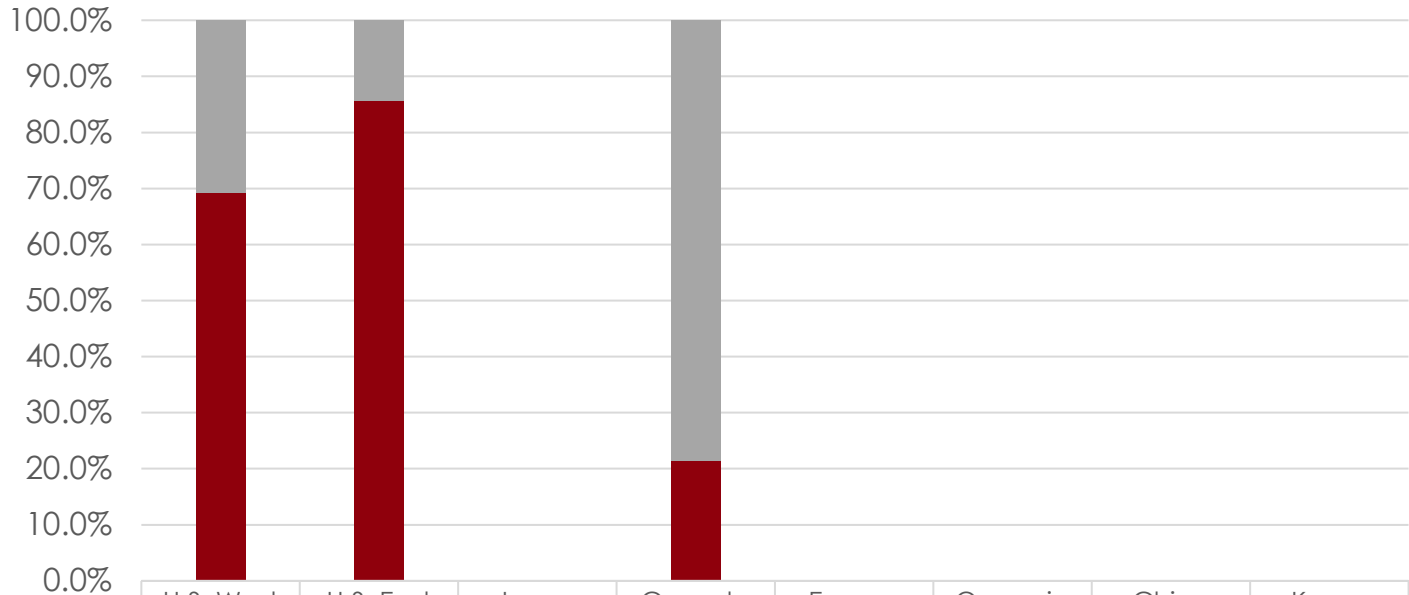
# ACCOMMODATIONS – MOLOKA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Condominium	35.7%	24.5%	0.0%	46.2%	28.3%	0.0%	0.0%	0.0%
Hotel/ resort/ villa	18.3%	21.4%	70.7%	0.0%	35.9%	0.0%	0.0%	0.0%
Vacation rental (includes Airbnb, VRBO, etc.)	21.9%	14.3%	0.0%	71.8%	0.0%	0.0%	0.0%	0.0%
Day trip/ Did not stay overnight	9.6%	11.2%	29.3%	12.8%	35.9%	0.0%	0.0%	0.0%
Stayed with friends or relatives	13.2%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cruise Ship	3.9%	12.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Private Room in Private Home	6.1%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rental House	3.9%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Own property/ 2nd home	3.9%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# ACCOMMODATIONS - MOLOKA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Visitor area	30.8%	14.3%		78.5%				
■ Residential Neighborhood	69.2%	85.7%		21.5%				
BASE	29	21		5				

# ACCOMMODATIONS - MOLOKAI'I

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Price/ value/ best deal	30.8%	28.5%	0.0%	17.8%	0.0%	0.0%	0.0%	0.0%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	20.9%	28.6%	0.0%	42.9%	0.0%	0.0%	0.0%	0.0%
Location	20.9%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Owned by self, friend or relative	20.9%	14.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Availability	3.3%	14.3%	0.0%	17.8%	0.0%	0.0%	0.0%	0.0%
Ability to have travel party members stay together	0.0%	0.0%	0.0%	21.5%	0.0%	0.0%	0.0%	0.0%
Recommended friends/family	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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# STRENGTHS/ POSITIVE ASPECTS – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Nature/ natural beauty/ scenery	37.0%	31.6%	0.0%	12.8%	71.7%	0.0%	0.0%	0.0%
Local culture/ people/ music	19.5%	13.3%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
Beach/ ocean	11.0%	10.2%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Feeling of the "Aloha Spirit"	8.1%	9.2%	0.0%	30.8%	28.3%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	5.2%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Events/ celebrations with friends/ family	3.9%	4.1%	53.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Activities/Attractions (not specified as part of a package)	3.2%	5.1%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Variety of activities/ attractions/ many choices	0.0%	7.1%	11.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Accommodations/ was as promised	1.9%	3.1%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
Not crowded/ few tourists	1.9%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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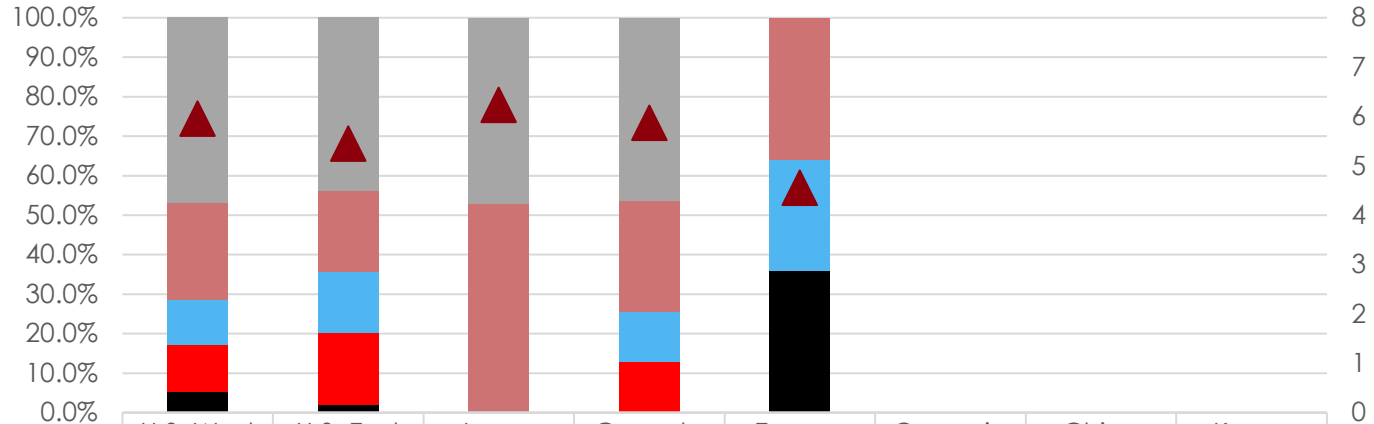
# AREAS OF OPPORTUNITIES – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	47.1%	51.0%	47.0%	43.6%	100.0%	0.0%	0.0%	0.0%
Food/ restaurant variety/ dining options	16.2%	11.2%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
Variety of activities/ attractions	5.2%	4.1%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	2.3%	6.1%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Would like to experience more local culture	1.9%	4.1%	35.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	4.2%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	4.9%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	2.9%	1.0%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
Food/ restaurant quality	2.9%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Visit too short/want to stay longer	1.9%	2.0%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%
Nuisances (dirty or unavailable public restrooms, litter, bugs, animals, noise, shabby)	1.9%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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# LIKELIHOOD OF RETURN VISIT – MOLOKA‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	46.9%	44.0%	47.0%	46.2%	0.0%			
■ Somewhat likely (5-6)	24.6%	20.4%	53.0%	28.2%	35.9%			
■ Somewhat unlikely (3-4)	11.1%	15.3%	0.0%	12.8%	28.3%			
■ Very unlikely (1-2)	12.1%	18.4%	0.0%	12.8%	0.0%			
■ Not sure	5.2%	2.0%	0.0%	0.0%	35.9%			
BASE	97	98	6	7	3			
▲ MEAN	5.96	5.45	6.23	5.88	4.56			

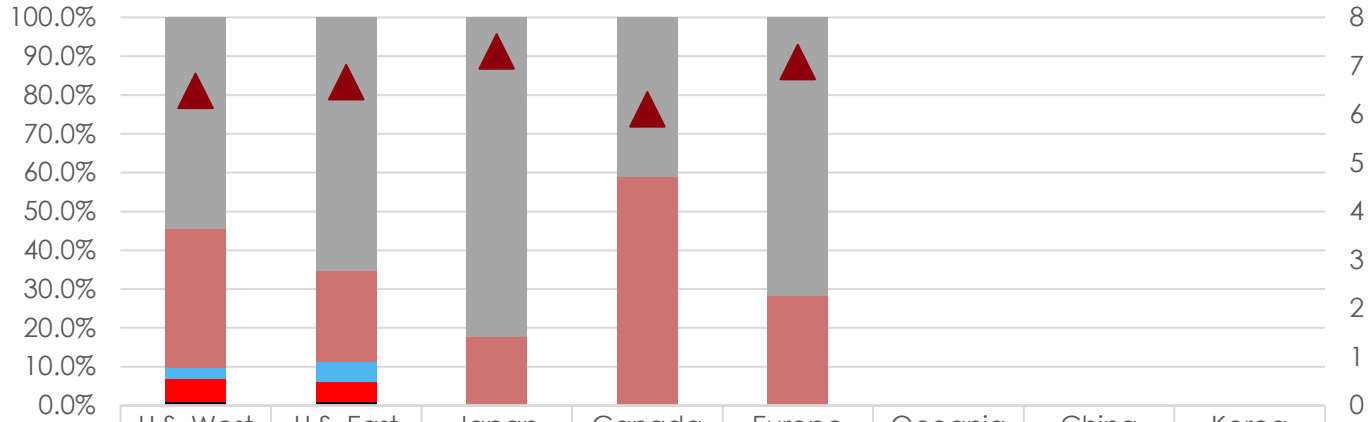
# REASONS FOR NOT RETURNING – MOLOKA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Want to go someplace new	28.7%	40.0%	0.0%	0.0%	55.9%	0.0%	0.0%	0.0%
No reason to return/ nothing new	24.1%	22.9%	0.0%	0.0%	44.1%	0.0%	0.0%	0.0%
Flight too long	3.4%	28.5%	0.0%	50.0%	55.9%	0.0%	0.0%	0.0%
Nothing to do/ boring	17.2%	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Unfriendly people/ felt unwelcome	17.2%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Too expensive/cost	3.4%	14.2%	0.0%	0.0%	44.1%	0.0%	0.0%	0.0%
Other financial obligations	14.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other (please specify)	3.4%	5.7%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%
Poor health/ age restriction	0.0%	8.6%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%
Already visited/ been there several times	4.6%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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# MOLOKA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	54.4%	65.3%	82.3%	41.0%	71.7%			
Somewhat likely (5-6)	35.7%	23.4%	17.7%	59.0%	28.3%			
Somewhat unlikely (3-4)	3.0%	5.1%	0.0%	0.0%	0.0%			
Very unlikely (1-2)	5.9%	5.1%	0.0%	0.0%	0.0%			
Not sure	1.0%	1.0%	0.0%	0.0%	0.0%			
BASE	97	98	6	7	3			
MEAN	6.48	6.66	7.29	6.10	7.08			

# MOLOKA'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	96.0%	97.9%	82.3%	100.0%	100.0%	0.0%	0.0%	0.0%
<b>On own (self guided)</b>	79.5%	78.2%	11.7%	87.2%	64.1%	0.0%	0.0%	0.0%
<b>Helicopter/ airplane</b>	2.0%	4.2%	0.0%	12.8%	35.9%	0.0%	0.0%	0.0%
<b>Boat/ submarine/ whale</b>	19.2%	12.5%	17.7%	0.0%	35.9%	0.0%	0.0%	0.0%
<b>Visit towns</b>	62.3%	54.2%	53.0%	74.4%	0.0%	0.0%	0.0%	0.0%
<b>Limo/ van/ bus tour</b>	9.6%	11.4%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scenic views/ natural landmark</b>	58.6%	59.4%	17.7%	71.8%	28.3%	0.0%	0.0%	0.0%
<b>Movie/ TV/ film location</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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# MOLOKA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.1%	93.8%	82.3%	87.2%	100.0%	0.0%	0.0%	0.0%
<b>Beach/ sunbathing</b>	71.5%	70.9%	70.7%	74.4%	64.1%	0.0%	0.0%	0.0%
<b>Bodyboard</b>	1.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Standup paddle board</b>	5.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Surfing</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Canoeing/ kayak</b>	8.3%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Swim ocean</b>	38.4%	32.3%	0.0%	15.4%	28.3%	0.0%	0.0%	0.0%
<b>Snorkel</b>	24.5%	25.0%	0.0%	0.0%	28.3%	0.0%	0.0%	0.0%
<b>Freediving</b>	2.0%	0.0%	0.0%	0.0%	35.9%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	1.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fishing</b>	8.3%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	4.0%	4.2%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%

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# MOLOKA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.1%	93.8%	82.3%	87.2%	100.0%	0.0%	0.0%	0.0%
<b>Run/ Jog/ Fitness walk</b>	28.5%	21.9%	0.0%	46.2%	0.0%	0.0%	0.0%	0.0%
<b>Spa</b>	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Hiking</b>	49.3%	48.9%	0.0%	30.8%	64.1%	0.0%	0.0%	0.0%
<b>Backpack/Camping</b>	5.3%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Agritourism</b>	24.8%	13.5%	82.3%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Sport event/ tournament</b>	2.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	15.6%	19.8%	53.0%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Waterpark</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zip lining</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	2.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Horseback riding</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.



# MOLOKA'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.7%	93.8%	100.0%	87.2%	100.0%	0.0%	0.0%	0.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	9.6%	13.5%	0.0%	0.0%	64.1%	0.0%	0.0%	0.0%
<b>Live music/ stage show</b>	19.9%	23.9%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	5.3%	8.3%	35.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fine dining</b>	16.2%	22.9%	70.7%	28.2%	0.0%	0.0%	0.0%	0.0%
<b>Family restaurant</b>	39.7%	44.8%	0.0%	30.8%	0.0%	0.0%	0.0%	0.0%
<b>Fast food</b>	29.5%	26.0%	29.3%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Food truck</b>	23.8%	14.6%	0.0%	30.8%	64.1%	0.0%	0.0%	0.0%
<b>Café/ coffee house</b>	30.8%	22.9%	53.0%	15.4%	64.1%	0.0%	0.0%	0.0%
<b>Ethnic dining</b>	10.3%	11.5%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Prepared own meal</b>	63.9%	54.2%	0.0%	87.2%	35.9%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are relatively small.

# MOLOKA'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.1%	86.5%	82.3%	87.2%	100.0%	0.0%	0.0%	0.0%
<b>Mall/ department store</b>	1.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Designer boutique</b>	3.3%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Hotel/ resort store</b>	3.0%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Swap meet/ flea market</b>	5.3%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Discount/ outlet store</b>	2.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Supermarket</b>	57.0%	53.2%	29.3%	87.2%	0.0%	0.0%	0.0%	0.0%
<b>Farmer's market</b>	31.1%	33.3%	0.0%	43.6%	71.7%	0.0%	0.0%	0.0%
<b>Convenience store</b>	30.1%	33.3%	0.0%	59.0%	0.0%	0.0%	0.0%	0.0%
<b>Duty free store</b>	0.0%	0.0%	53.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Local shop/ artisan</b>	58.6%	62.5%	17.7%	59.0%	64.1%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# MOLOKA'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	61.9%	62.5%	29.3%	43.6%	35.9%	0.0%	0.0%	0.0%
<b>Historic military site</b>	2.0%	2.1%	29.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Other historical site</b>	54.3%	47.9%	17.7%	43.6%	35.9%	0.0%	0.0%	0.0%
<b>Museum/ art gallery</b>	9.9%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	2.3%	10.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Play/ concert/ theatre</b>	3.3%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Art/ craft fair</b>	6.3%	4.2%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Festival event</b>	6.3%	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# MOLOKA'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	71.2%	79.2%	100.0%	71.8%	100.0%	0.0%	0.0%	0.0%
<b>Airport shuttle</b>	7.3%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Trolley</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Public bus</b>	2.0%	1.0%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%
<b>Tour bus/ tour van</b>	9.6%	13.5%	64.7%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Taxi/ limo</b>	7.3%	7.3%	35.3%	12.8%	0.0%	0.0%	0.0%	0.0%
<b>Rental car</b>	59.3%	61.5%	70.7%	71.8%	64.1%	0.0%	0.0%	0.0%
<b>Ride share</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Bicycle rental</b>	1.0%	0.0%	0.0%	0.0%	35.9%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

## MOLOKA'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	30.5%	28.2%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Visit friends/ family</b>	30.5%	28.2%	0.0%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Volunteer non profit</b>	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# MOLOKA'I - ACTIVITIES – ATTRACTIONS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Ali'i Fishpond</b>	12.3%	10.4%	17.7%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Halawa Beach Park</b>	42.1%	35.4%	0.0%	43.6%	0.0%	0.0%	0.0%	0.0%
<b>Halawa Valley</b>	34.4%	31.2%	70.7%	56.4%	35.9%	0.0%	0.0%	0.0%
<b>Kalaupapa National Historic Park</b>	26.8%	31.2%	70.7%	0.0%	35.9%	0.0%	0.0%	0.0%
<b>Kamakou</b>	4.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Kauaiwa Coconut Grove</b>	10.6%	11.5%	47.0%	15.4%	35.9%	0.0%	0.0%	0.0%
<b>Kapukahehu Beach</b>	39.7%	28.2%	0.0%	30.8%	0.0%	0.0%	0.0%	0.0%
<b>Kumimi Beach Park</b>	26.5%	26.1%	70.7%	30.8%	64.1%	0.0%	0.0%	0.0%

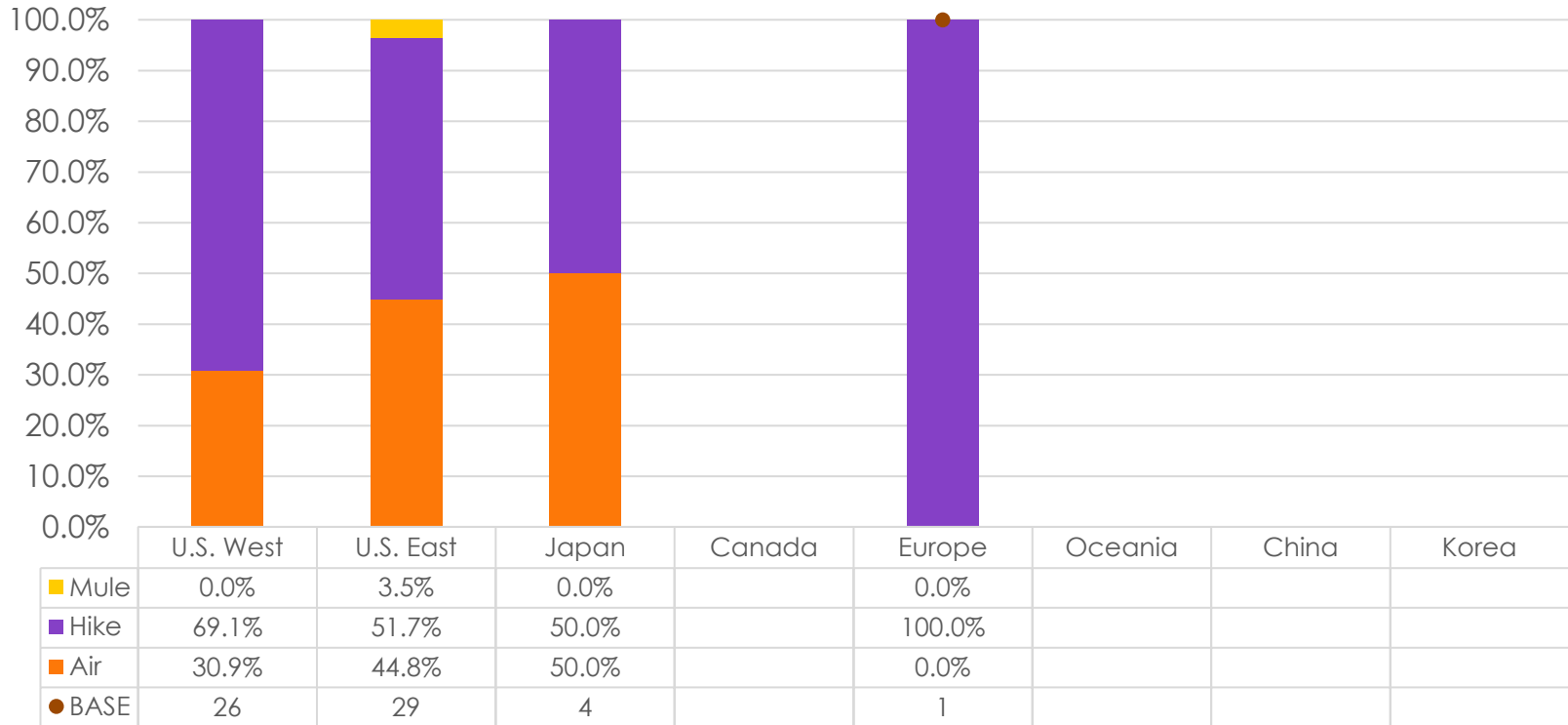
Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# MOLOKA'I - ACTIVITIES – ATTRACTIONS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Moloka'i Mule Ride</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Moloka'i Museum &amp; Cultural Center</b>	14.2%	10.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Olo'upena Falls</b>	6.9%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>One Ali'i Beach Park</b>	15.2%	21.9%	35.3%	28.2%	0.0%	0.0%	0.0%	0.0%
<b>Pala'au State Park</b>	27.8%	20.8%	35.3%	25.6%	28.3%	0.0%	0.0%	0.0%
<b>Papohaku Beach</b>	44.0%	36.5%	35.3%	46.2%	28.3%	0.0%	0.0%	0.0%
<b>Wailau Valley</b>	12.3%	18.7%	0.0%	12.8%	28.3%	0.0%	0.0%	0.0%

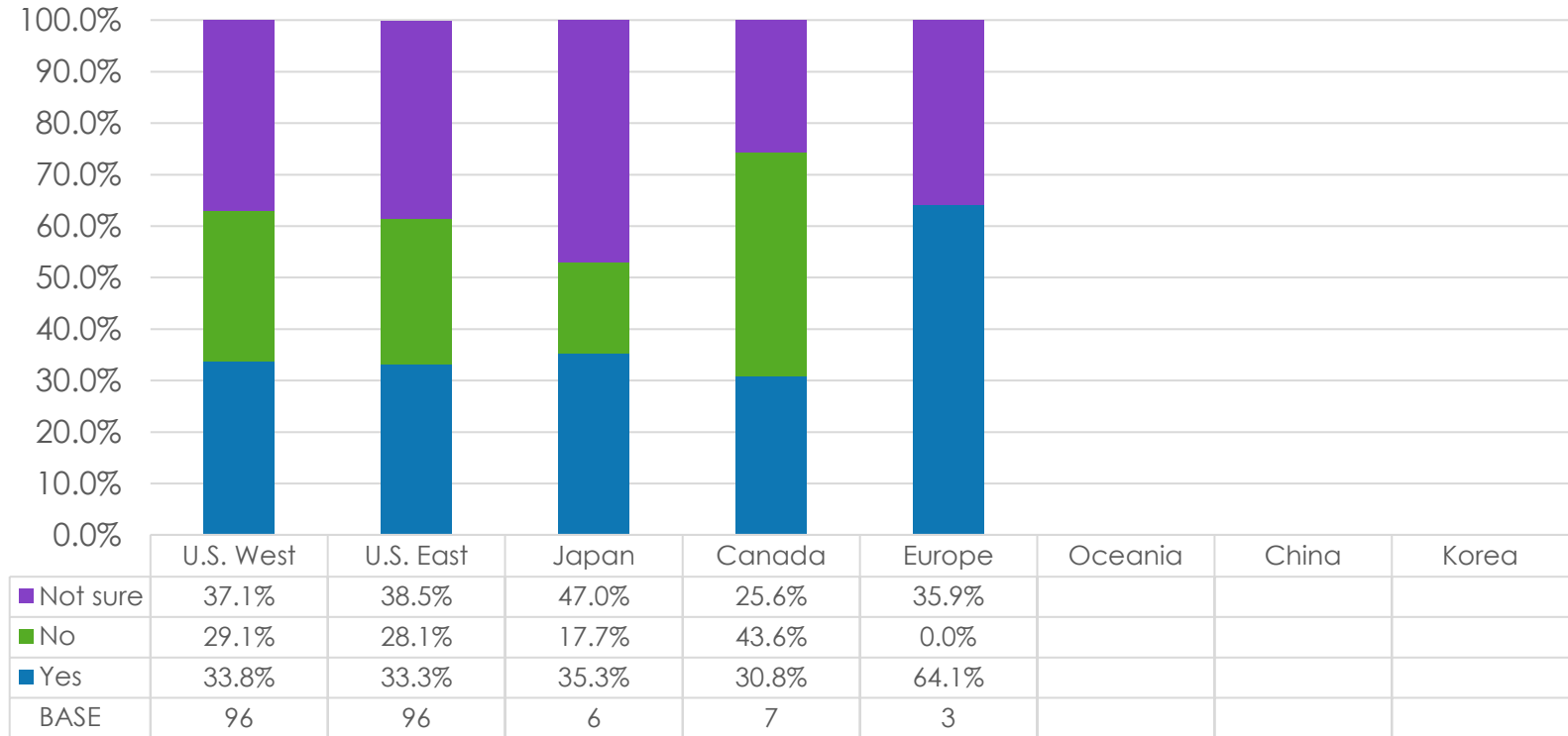
Sample sizes for Moloka'i are small with none of the markets exceeding 100 visitors surveyed.

# KALAUPAPA NATIONAL HISTORICAL PARK - EXPERIENCE

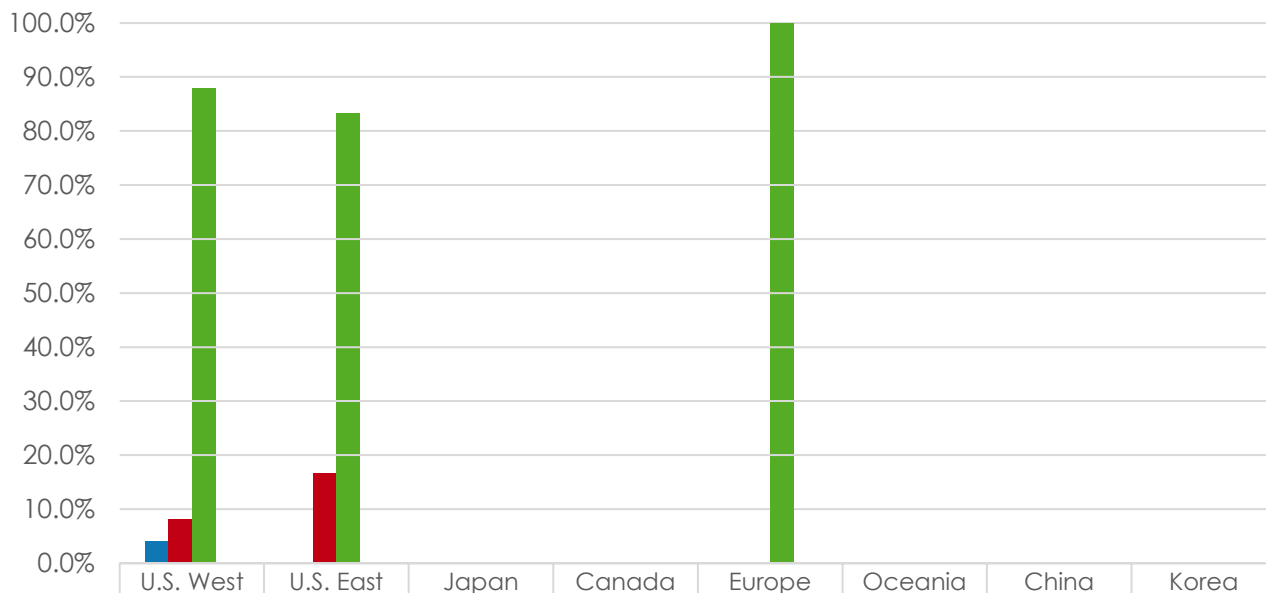




# AIRPORT VISITORS CENTER



# SNORKELING EQUIPMENT USED – MOLOKA‘I



Other Response	4.1%	0.0%			0.0%			
Full-face snorkel mask	8.1%	16.7%			0.0%			
2-Piece, separate mask & snorkel	87.8%	83.3%			100.0%			
BASE	24	24			1			

# SNORKELING EQUIPMENT USED – MOLOKA‘I

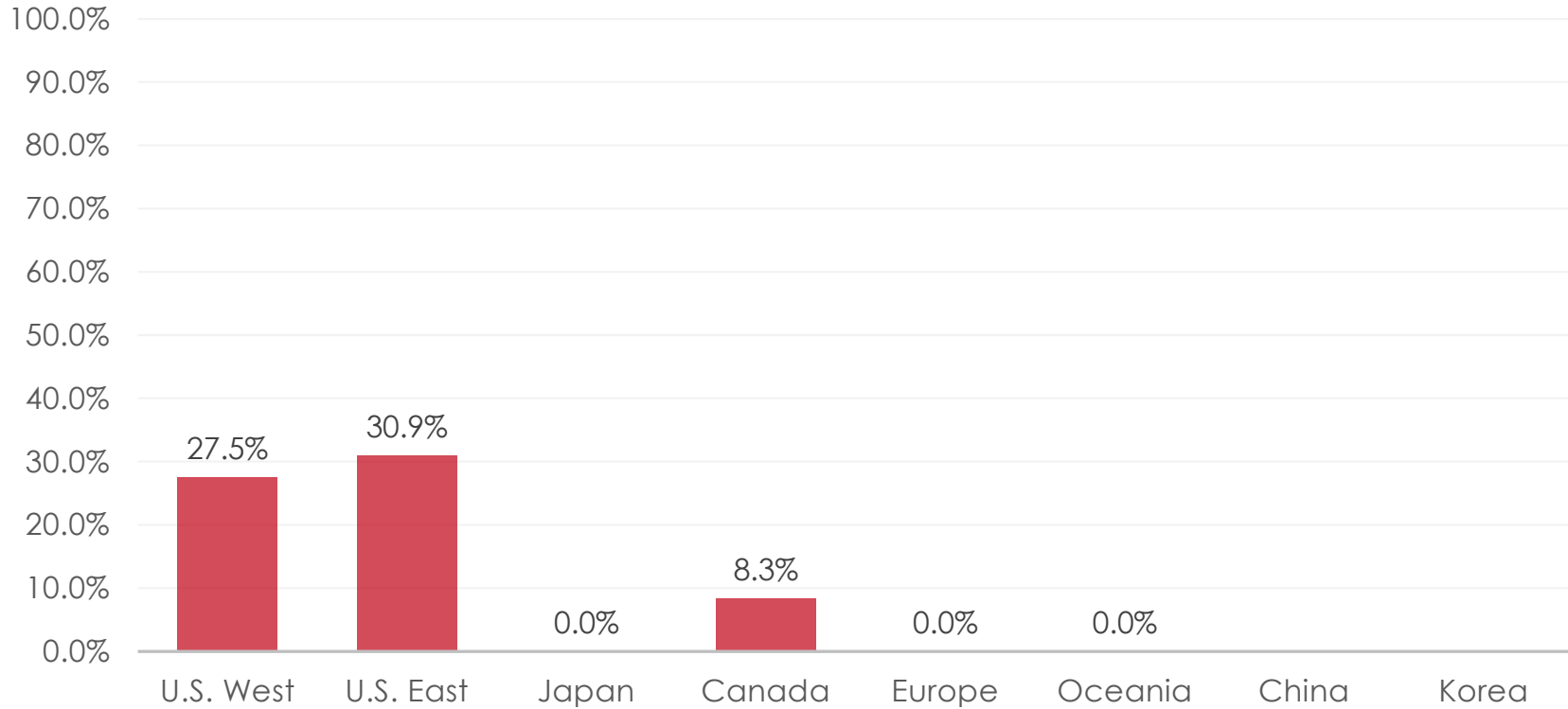
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	91.9%	95.8%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Yes, while using a 2 piece mask & snorkel	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while using a full face snorkel mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	4.1%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Caution small base: Japan, Europe, Oceania, China, and Korea less than 100 respondents

Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

# SECTION – ISLAND OF LANA‘I

# AIDED ADVERTISING AWARENESS – LANA'I

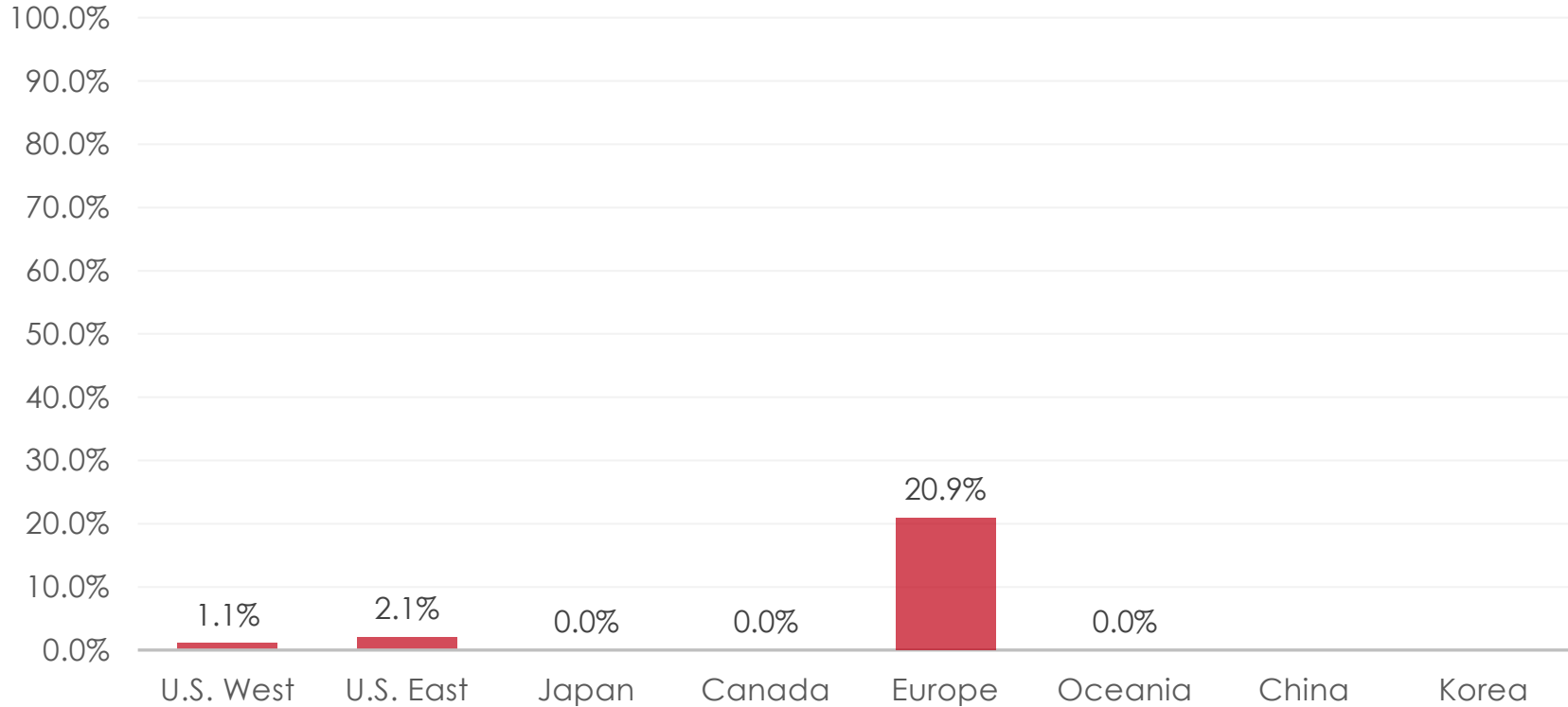


Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

597 Q. Do you remember seeing or hearing advertising for Lana'i prior to your arrival?



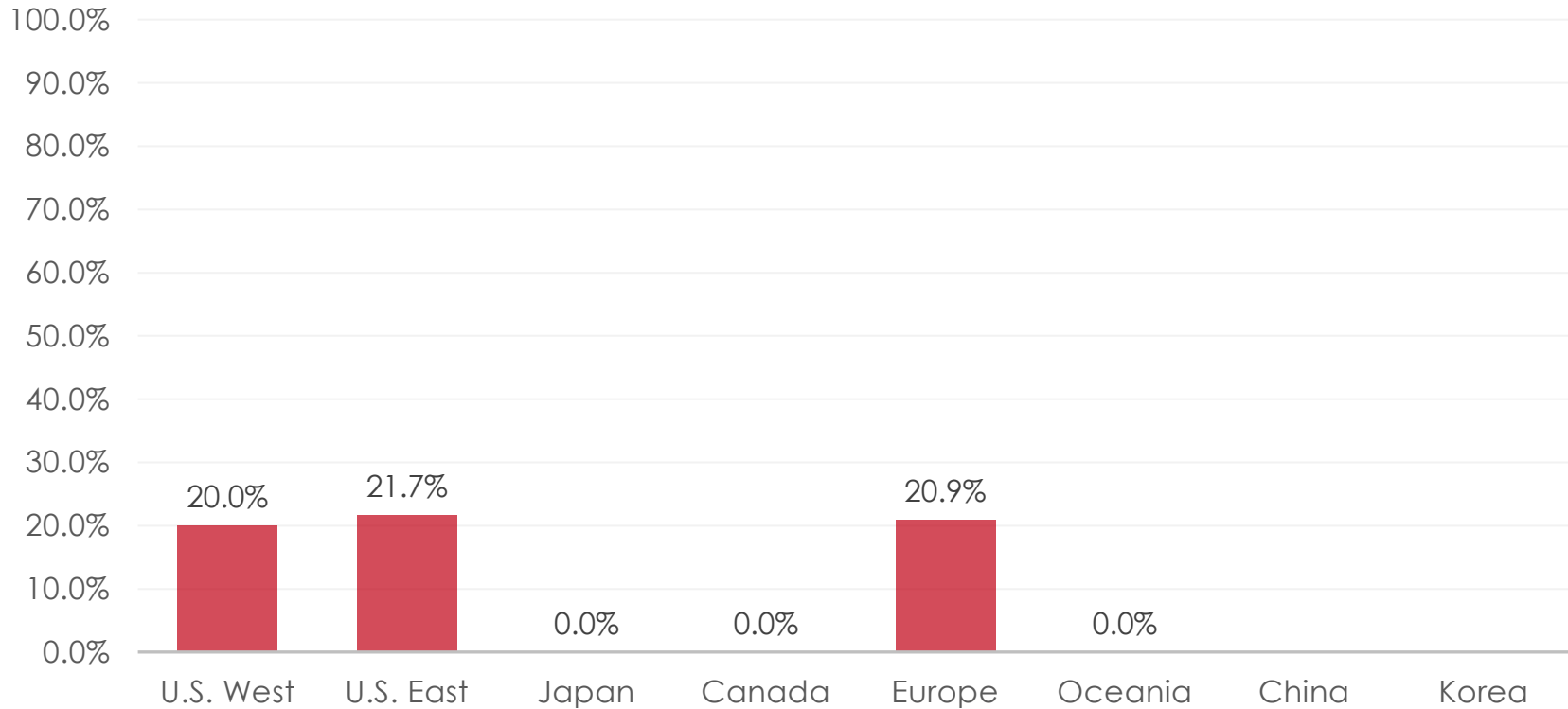
# IMPACT OF LOCATION FILMING—LANA'I



Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

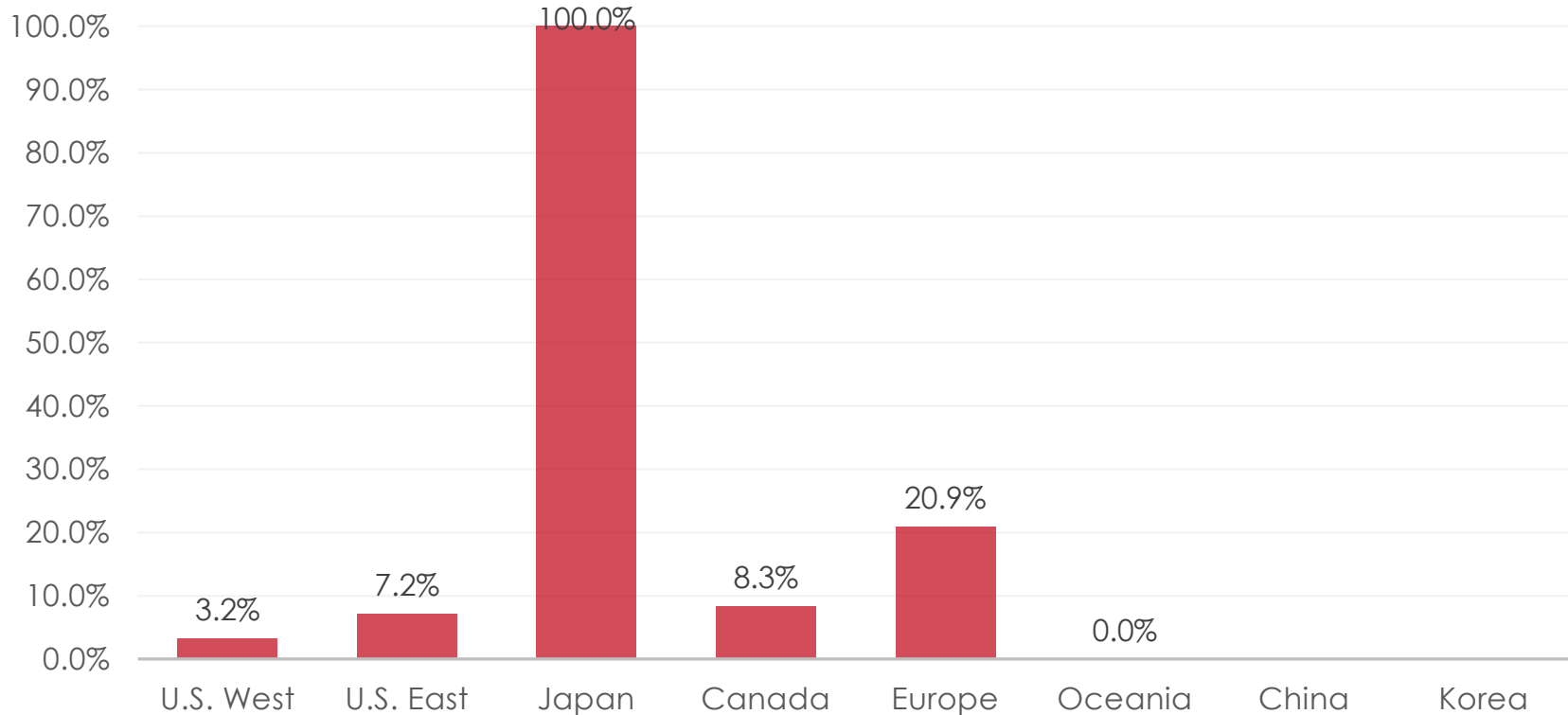
598 Q. Which of the following, if any, motivated you to visit the island of Lanai'i?

# IMPACT OF OUTDOOR/ SPORTING EVENT – LANAI 'I



Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

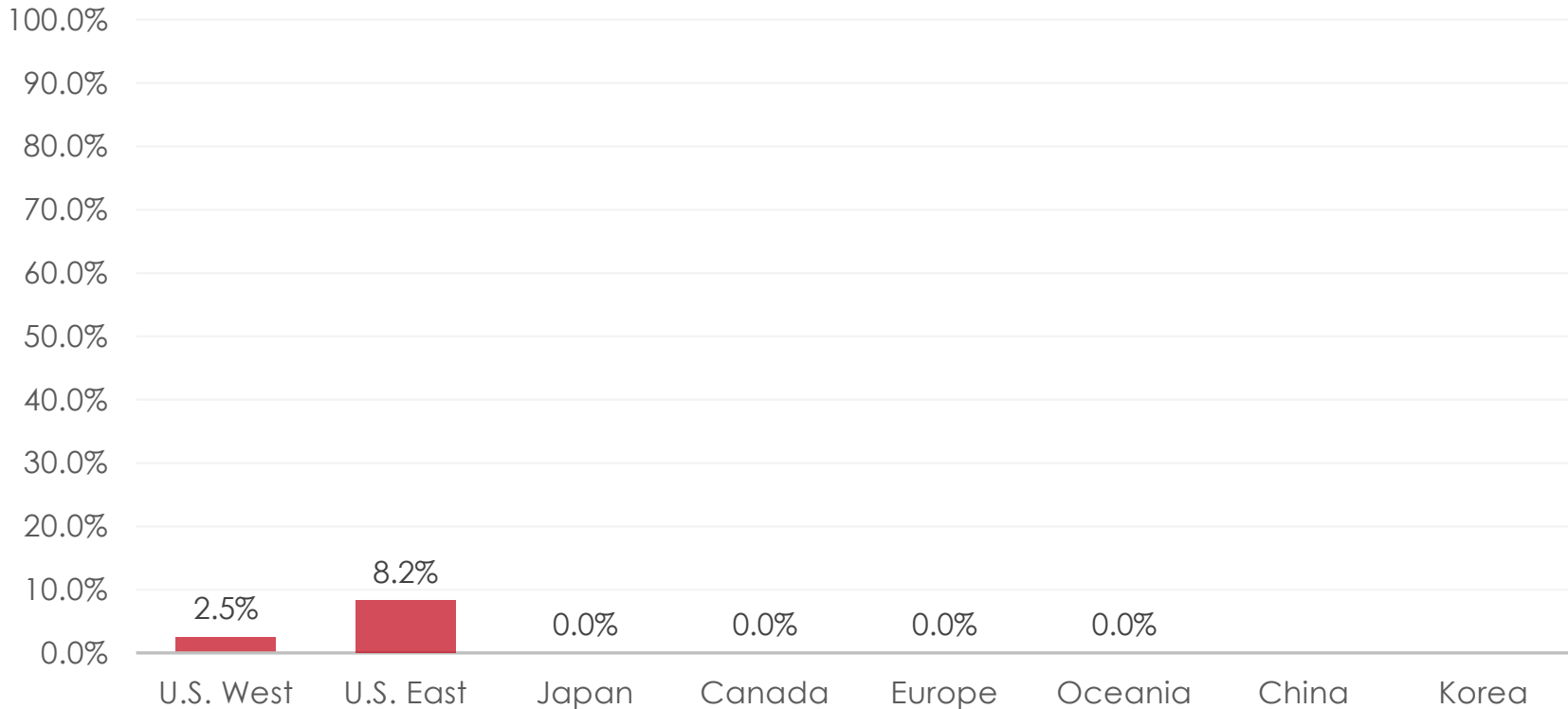
# IMPACT OF SOCIAL MEDIA POST/ VIDEO– LANAI‘I



Sample sizes for Lanai are small with none of the markets exceeding 100 visitors.



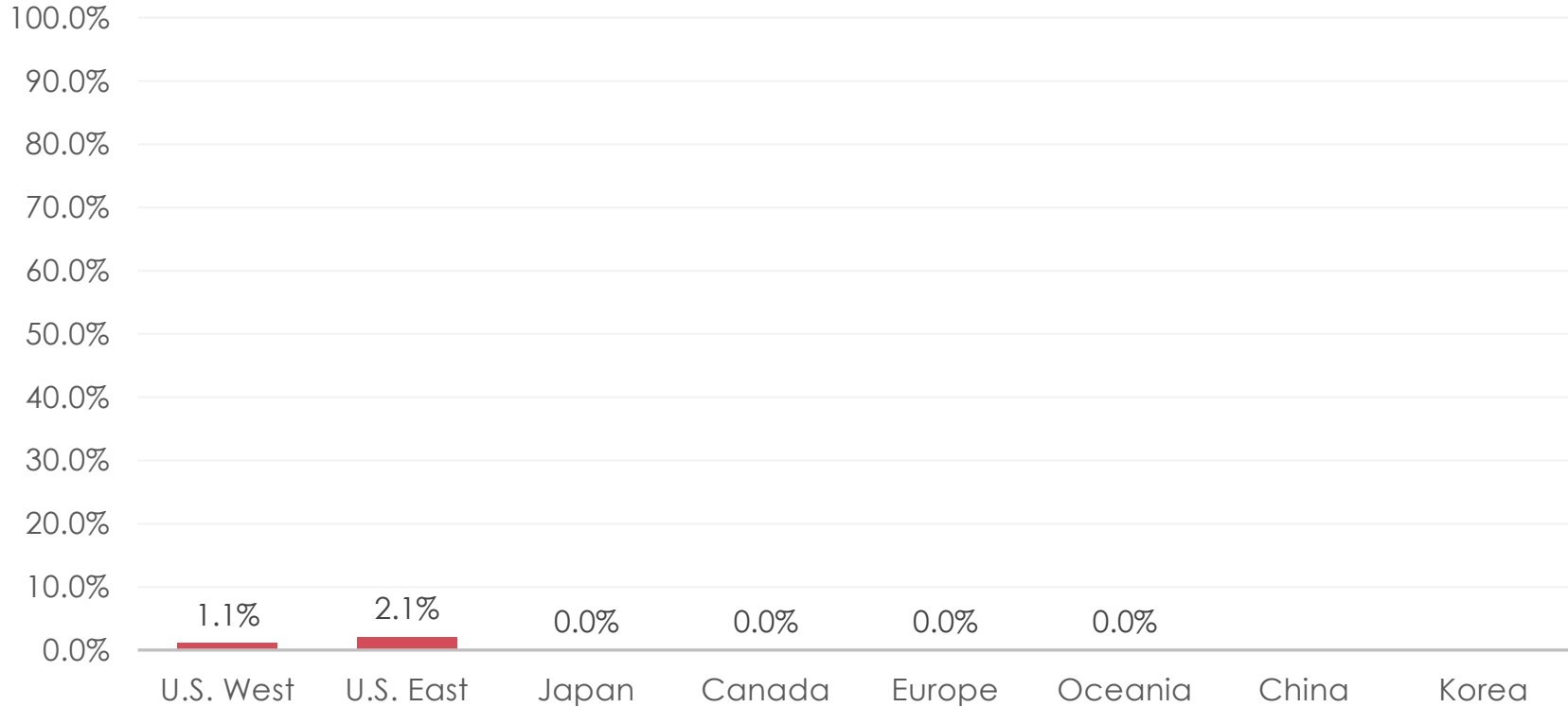
# IMPACT OF HAWAIIAN CULTURAL EVENT – LANAI‘I



Sample sizes for Lāna‘i are small with none of the markets exceeding 100 visitors.

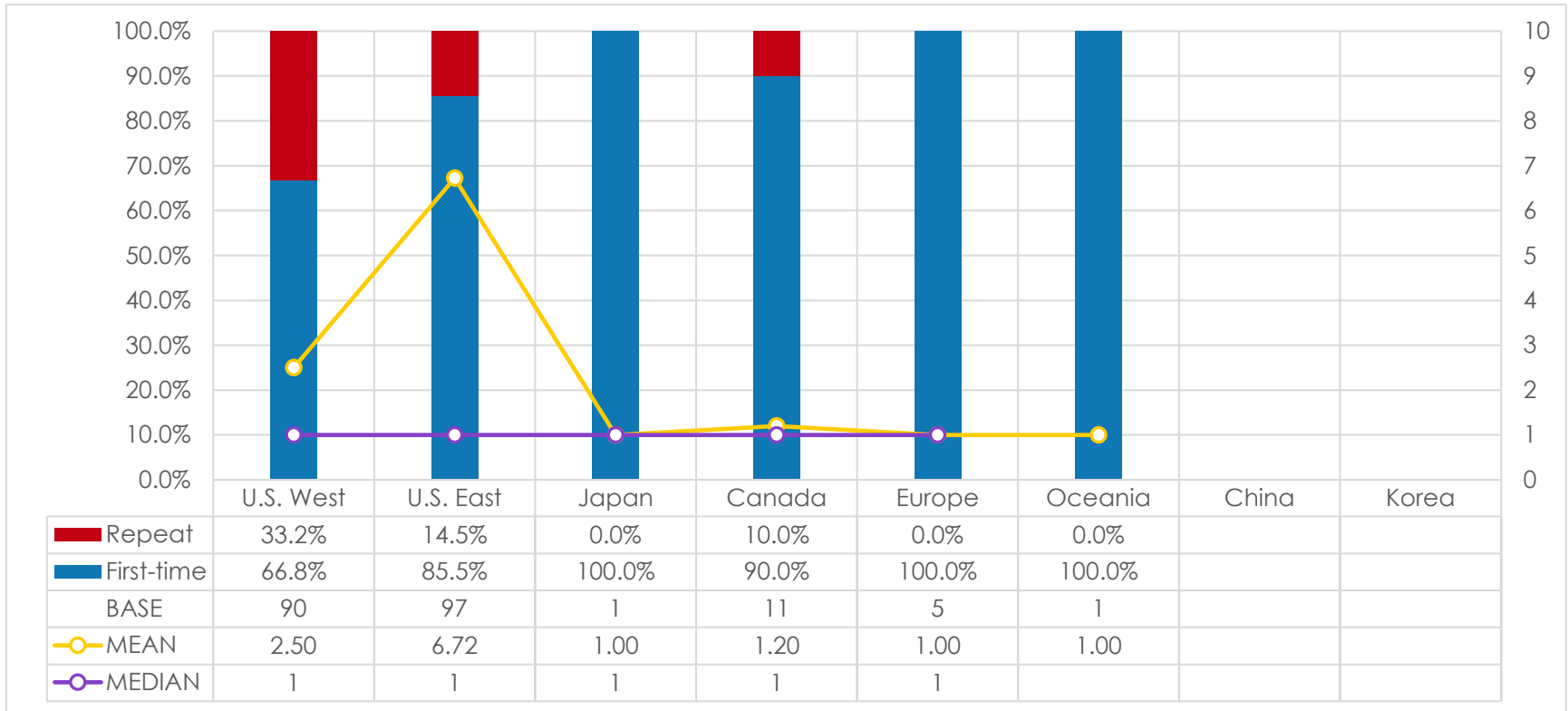
601 Q. Which of the following, if any, motivated you to visit the island of Lanai‘i?

# IMPACT OF HAWAIIAN MUSIC – LANAI‘I



Sample sizes for Lāna‘i are small with none of the markets exceeding 100 visitors.

# 1<sup>ST</sup> TIME VS REPEAT VISITOR –LANA'I



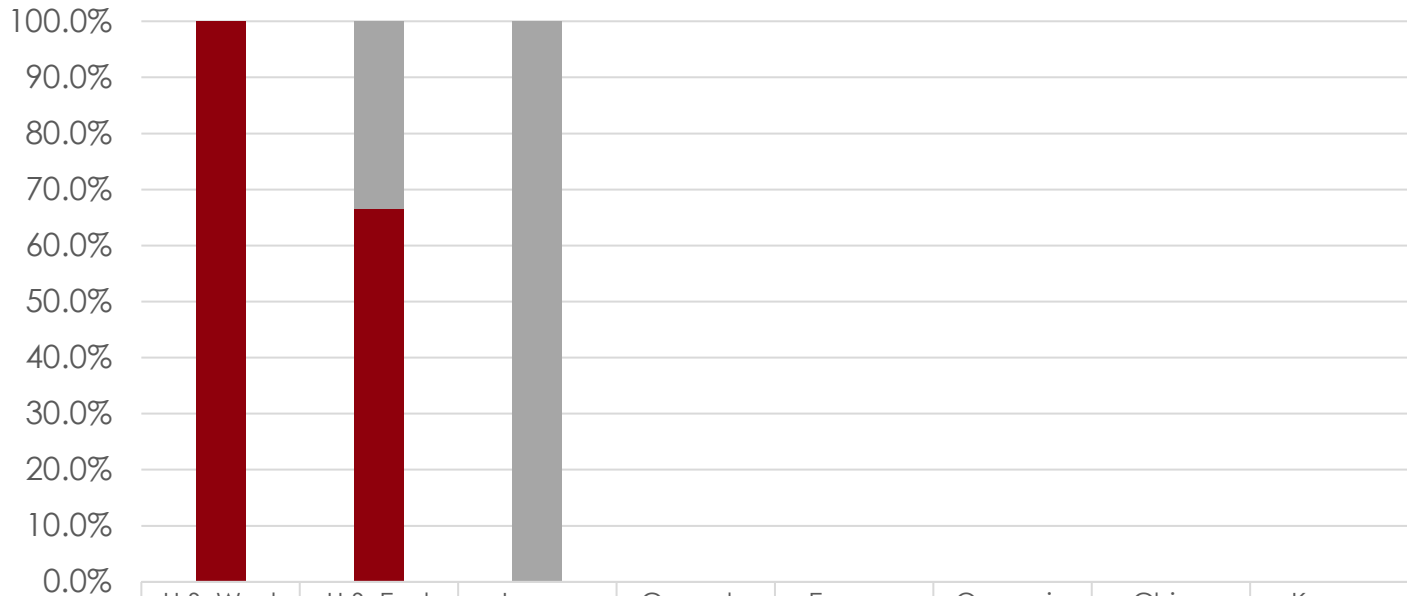
# ACCOMMODATIONS – LANA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Day trip/ Did not stay overnight	53.9%	42.3%	0.0%	75.1%	20.9%	100.0%	0.0%	0.0%
Hotel/ resort/ villa	28.6%	32.0%	0.0%	8.3%	37.3%	0.0%	0.0%	0.0%
Cruise Ship	2.1%	13.4%	0.0%	16.6%	41.8%	0.0%	0.0%	0.0%
Stayed with friends or relatives	7.9%	7.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Condominium	4.6%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Vacation rental (includes Airbnb, VRBO, etc.)	2.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Own property/ 2nd home	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Private Room in Private Home	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Timeshare Unit	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

# ACCOMMODATIONS - LANA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Visitor area	0.0%	33.5%	100.0%					
Residential Neighborhood	100.0%	66.5%	0.0%					
BASE	4	3	1					

# ACCOMMODATIONS - LANA'I

## Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Location	0.0%	66.5%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Owned by self, friend or relative	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Recommended friends/family	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Availability	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ability to have travel party members stay together	0.0%	33.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lana'i are small with none of the markets exceeding 100 visitors surveyed.

# STRENGTHS/ POSITIVE ASPECTS – LANAI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Beach/ ocean	23.2%	12.5%	0.0%	26.6%	20.9%	0.0%	0.0%	0.0%
Nature/ natural beauty/ scenery	16.8%	17.7%	0.0%	18.3%	20.9%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	11.1%	14.6%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
Feeling of the "Aloha Spirit"	7.9%	7.3%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%
Variety of activities/ attractions/ many choices	2.5%	9.4%	0.0%	10.0%	20.9%	100.0%	0.0%	0.0%
Activities/Attractions (not specified as part of a package)	6.8%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local culture/ people/ music	3.2%	7.3%	0.0%	0.0%	20.9%	0.0%	0.0%	0.0%
Accommodations/ good service from staff	6.8%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Accommodations/ was as promised	1.1%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Feeling safe (able to walk at night)	2.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Food/ restaurant/ good service	2.1%	1.0%	0.0%	8.3%	16.5%	0.0%	0.0%	0.0%

Sample sizes for Lanai are small with none of the markets exceeding 100 visitors.

# AREAS OF OPPORTUNITIES – LANAI

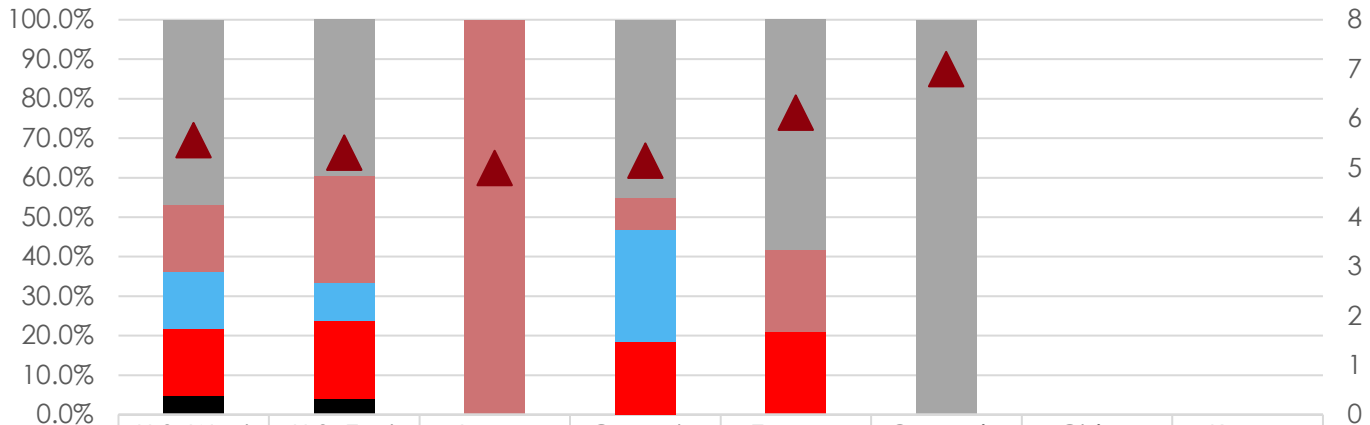
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No negatives/ everything was great	55.4%	65.6%	0.0%	45.0%	79.1%	100.0%	0.0%	0.0%
Food/ restaurant variety/ dining options	11.4%	7.3%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
Variety of activities/ attractions	5.7%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	4.3%	3.1%	0.0%	18.3%	0.0%	0.0%	0.0%	0.0%
Would like to experience more local culture	3.2%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	3.6%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Food/ restaurant quality	3.2%	1.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lanai are small with none of the markets exceeding 100 visitors.



# LIKELIHOOD OF RETURN VISIT – LANAI

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	46.8%	39.6%	0.0%	45.0%	58.2%	100.0%		
■ Somewhat likely (5-6)	17.1%	27.1%	100.0%	8.3%	20.9%	0.0%		
■ Somewhat unlikely (3-4)	14.3%	9.4%	0.0%	28.4%	0.0%	0.0%		
■ Very unlikely (1-2)	17.1%	19.7%	0.0%	18.3%	20.9%	0.0%		
■ Not sure	4.6%	4.1%	0.0%	0.0%	0.0%	0.0%		
BASE	90	96	1	11	5	1		
▲ MEAN	5.56	5.31	5.00	5.15	6.12	7.00		

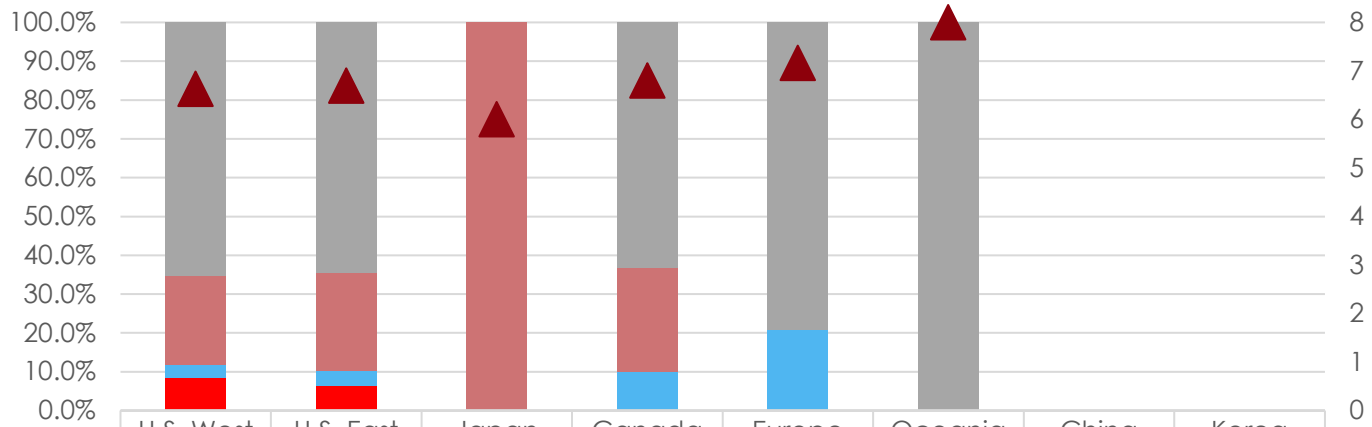
# REASONS FOR NOT RETURNING – LANA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No reason to return/ nothing new	31.7%	37.6%	0.0%	82.2%	0.0%	0.0%	0.0%	0.0%
Want to go someplace new	31.7%	31.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Too expensive/cost	11.9%	21.9%	0.0%	17.8%	100.0%	0.0%	0.0%	0.0%
Nothing to do/ boring	17.8%	9.4%	0.0%	21.5%	0.0%	0.0%	0.0%	0.0%
Other (please specify)	8.9%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Flight too long	0.0%	15.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor service	4.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hotel negative	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Not enough value for the price	3.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor health/ age restriction	3.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Five years too soon to revisit	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna‘i are small with none of the markets exceeding 100 visitors.

# LANA'I - BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	65.4%	64.6%	0.0%	63.3%	79.1%	100.0%		
■ Somewhat likely (5-6)	22.9%	25.0%	100.0%	26.6%	0.0%	0.0%		
■ Somewhat unlikely (3-4)	3.2%	4.2%	0.0%	10.0%	20.9%	0.0%		
■ Very unlikely (1-2)	8.6%	6.2%	0.0%	0.0%	0.0%	0.0%		
■ Not sure	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
BASE	90	96	1	11	5	1		
▲ MEAN	6.63	6.70	6.00	6.80	7.16	8.00		

# LANA'I - ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	91.0%	90.6%	100.0%	81.7%	83.5%	100.0%	0.0%	0.0%
<b>On own (self guided)</b>	41.5%	37.5%	0.0%	35.0%	20.9%	0.0%	0.0%	0.0%
<b>Helicopter/ airplane</b>	1.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Boat/ submarine/ whale</b>	24.5%	37.5%	0.0%	0.0%	41.8%	100.0%	0.0%	0.0%
<b>Visit towns</b>	36.5%	30.3%	100.0%	8.3%	0.0%	0.0%	0.0%	0.0%
<b>Limo/ van/ bus tour</b>	7.9%	9.4%	0.0%	28.4%	20.9%	0.0%	0.0%	0.0%
<b>Scenic views/ natural landmark</b>	50.5%	43.7%	0.0%	36.7%	0.0%	100.0%	0.0%	0.0%
<b>Movie/ TV/ film location</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

# LANA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.9%	90.7%	100.0%	75.1%	100.0%	100.0%	0.0%	0.0%
<b>Beach/ sunbathing</b>	67.1%	65.7%	0.0%	56.7%	58.2%	100.0%	0.0%	0.0%
<b>Bodyboard</b>	1.4%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Standup paddle board</b>	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Surfing</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Canoeing/ kayak</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Swim ocean</b>	49.5%	56.2%	0.0%	10.0%	20.9%	100.0%	0.0%	0.0%
<b>Snorkel</b>	46.6%	47.9%	0.0%	0.0%	37.3%	100.0%	0.0%	0.0%
<b>Freediving</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Windsurf/ Kitesurf</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Jet ski/ Parasail</b>	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Scuba</b>	3.2%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fishing</b>	1.4%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Golf</b>	7.9%	15.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

613 Q During this trip, which of the following activities did you participate in?

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.



# LANA'I - ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	89.9%	90.7%	100.0%	75.1%	100.0%	100.0%	0.0%	0.0%
<b>Run/ Jog/ Fitness walk</b>	20.6%	12.5%	100.0%	18.3%	0.0%	0.0%	0.0%	0.0%
<b>Spa</b>	15.9%	15.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Hiking</b>	35.0%	29.2%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
<b>Backpack/Camping</b>	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Agritourism</b>	2.2%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sport event/ tournament</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Park/ botanical garden</b>	8.3%	9.4%	0.0%	28.4%	20.9%	0.0%	0.0%	0.0%
<b>Waterpark</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Mountain tube/ waterfall rappel</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Zip lining</b>	3.6%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Skydiving</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>All terrain vehicle (ATV)</b>	5.4%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Horseback riding</b>	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

# LANA'I - ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	84.5%	89.6%	100.0%	73.4%	79.1%	100.0%	0.0%	0.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	22.0%	41.7%	0.0%	28.4%	58.2%	0.0%	0.0%	0.0%
<b>Live music/ stage show</b>	4.3%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Fine dining</b>	35.7%	36.4%	0.0%	16.6%	0.0%	0.0%	0.0%	0.0%
<b>Family restaurant</b>	25.3%	15.7%	100.0%	18.3%	0.0%	100.0%	0.0%	0.0%
<b>Fast food</b>	1.1%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Food truck</b>	2.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Café/ coffee house</b>	19.1%	12.5%	0.0%	8.3%	20.9%	0.0%	0.0%	0.0%
<b>Ethnic dining</b>	1.1%	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Prepared own meal</b>	27.1%	14.6%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

# LANA'I - ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	58.8%	59.4%	100.0%	53.3%	20.9%	0.0%	0.0%	0.0%
<b>Mall/ department store</b>	1.1%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Designer boutique</b>	6.9%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Hotel/ resort store</b>	14.8%	14.6%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%
<b>Swap meet/ flea market</b>	1.1%	2.1%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%
<b>Discount/ outlet store</b>	1.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Supermarket</b>	18.8%	19.8%	100.0%	8.3%	20.9%	0.0%	0.0%	0.0%
<b>Farmer's market</b>	7.9%	4.2%	0.0%	0.0%	20.9%	0.0%	0.0%	0.0%
<b>Convenience store</b>	17.3%	11.5%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
<b>Duty free store</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Local shop/ artisan</b>	26.4%	33.3%	0.0%	26.6%	20.9%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.



# LANA'I – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	36.8%	36.5%	100.0%	10.0%	20.9%	0.0%	0.0%	0.0%
<b>Historic military site</b>	1.1%	2.1%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Other historical site</b>	20.2%	14.6%	0.0%	10.0%	20.9%	0.0%	0.0%	0.0%
<b>Museum/ art gallery</b>	14.1%	9.4%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
<b>Luau/ Polynesian show/ hula show</b>	0.0%	10.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	1.1%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Play/ concert/ theatre</b>	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Art/ craft fair</b>	3.2%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Festival event</b>	4.7%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

# LANA'I - ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	65.7%	61.5%	100.0%	53.3%	79.1%	100.0%	0.0%	0.0%
<b>Airport shuttle</b>	24.5%	19.8%	0.0%	8.3%	16.5%	0.0%	0.0%	0.0%
<b>Trolley</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Public bus</b>	2.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Tour bus/ tour van</b>	16.2%	20.8%	0.0%	8.3%	41.8%	100.0%	0.0%	0.0%
<b>Taxi/ limo</b>	11.9%	9.3%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
<b>Rental car</b>	18.1%	19.8%	100.0%	26.6%	20.9%	0.0%	0.0%	0.0%
<b>Ride share</b>	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Bicycle rental</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

## LANA'I - ACTIVITIES – OTHER

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	15.9%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Visit friends/ family	12.3%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Volunteer non profit	3.6%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

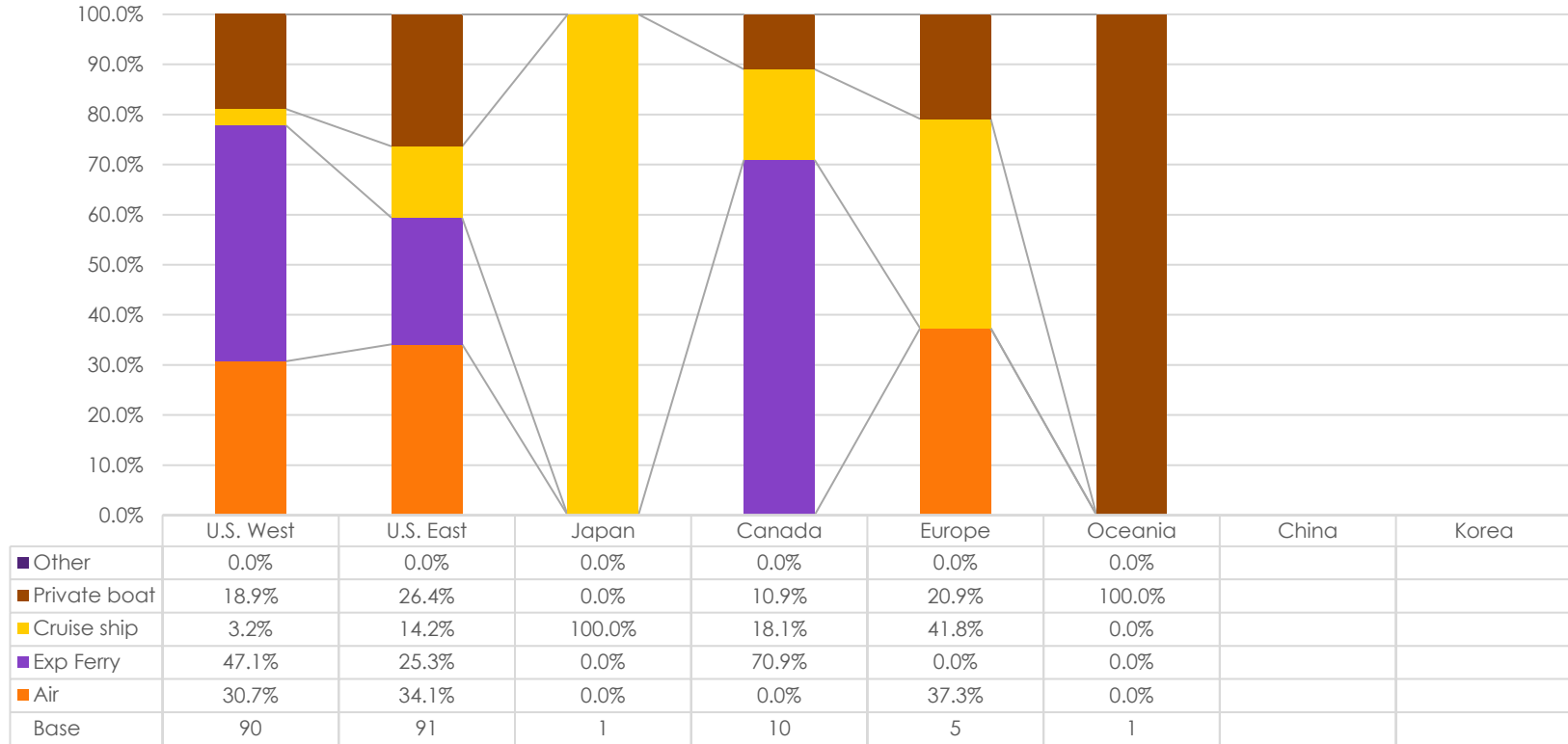
619 Q During this trip, which of the following activities did you participate in?

# LANA'I - ACTIVITIES – ATTRACTIONS

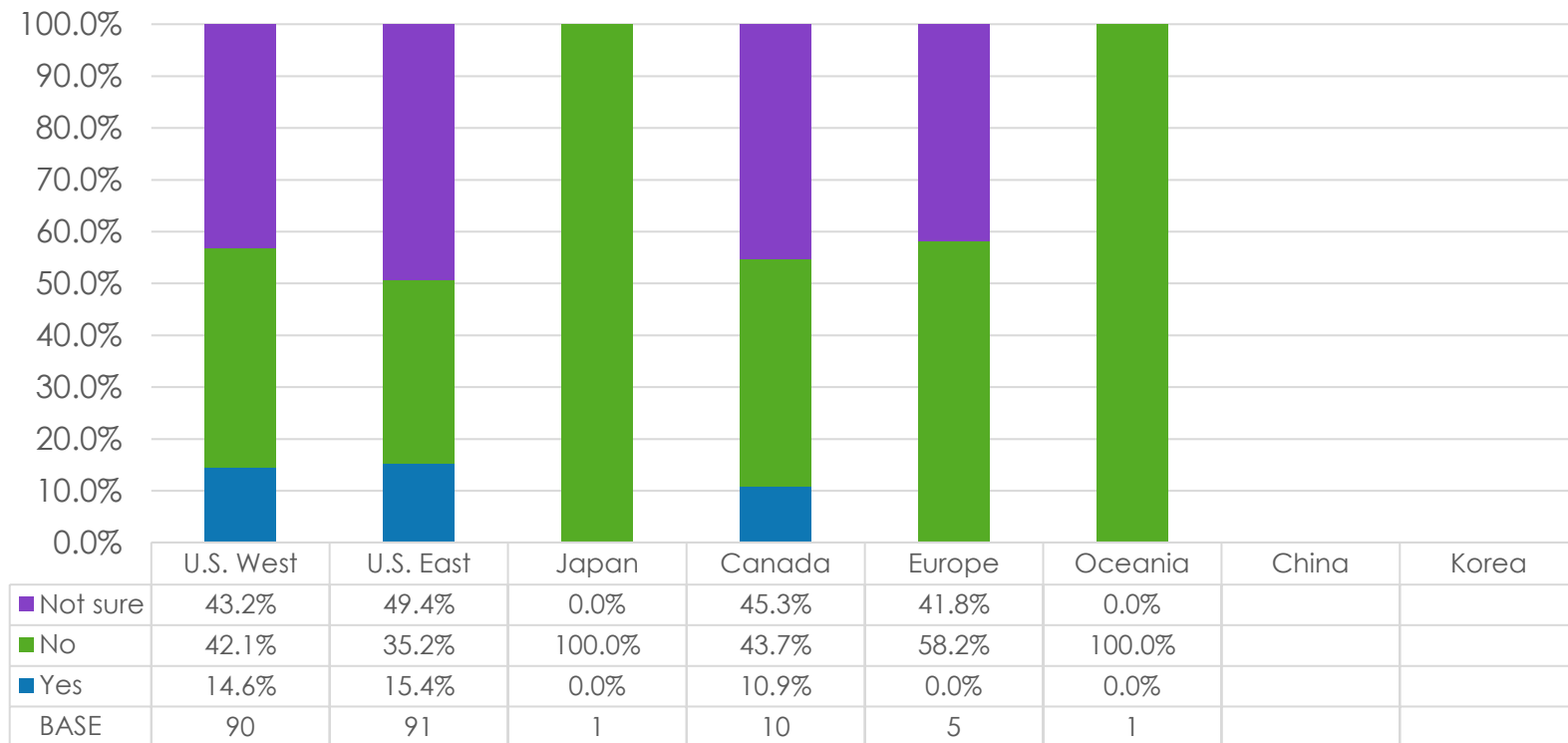
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Hawaiian Village at Kaunolu Fishing Village</b>	3.6%	6.3%	0.0%	8.3%	20.9%	0.0%	0.0%	0.0%
<b>Hulopoe Bay</b>	43.3%	36.5%	0.0%	48.4%	20.9%	100.0%	0.0%	0.0%
<b>Kaiolohia</b>	23.8%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Kanepuu Preserve</b>	2.5%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Keahiakawelo</b>	14.1%	14.6%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
<b>Manele Golf Course</b>	10.1%	12.5%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
<b>Munro Trail</b>	9.4%	8.3%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Polihua Beach</b>	10.8%	10.4%	0.0%	26.6%	0.0%	0.0%	0.0%	0.0%
<b>Puu Pehe</b>	27.1%	28.1%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna'i are small with none of the markets exceeding 100 visitors.

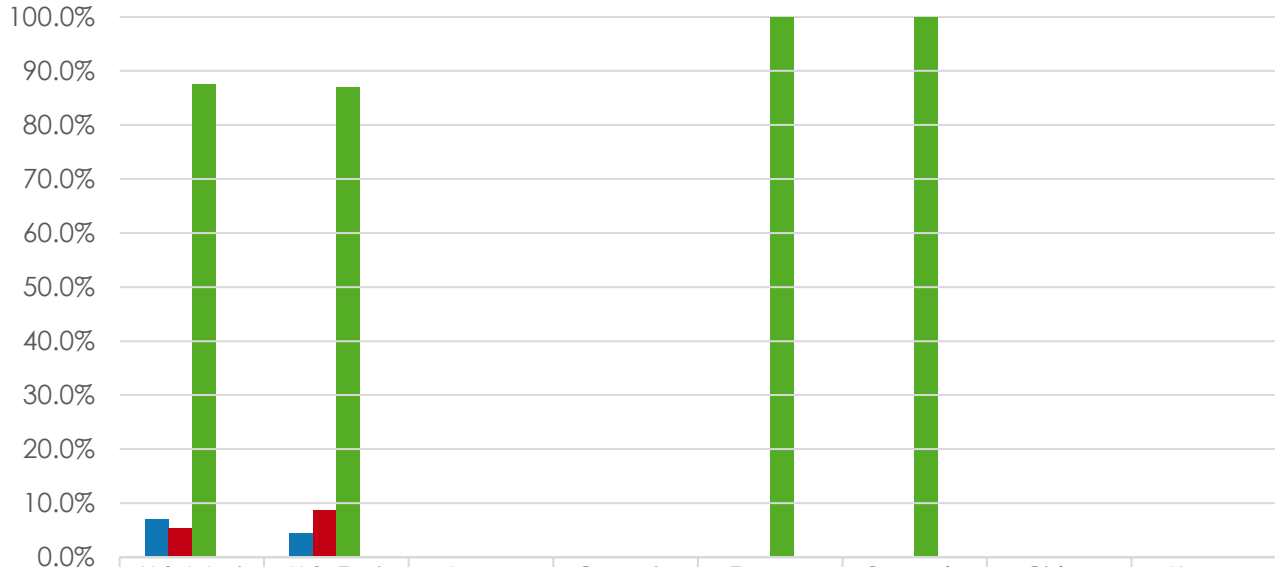
# TRANSPORTATION TO LANA'I



# AIRPORT VISITORS CENTER



# SNORKELING EQUIPMENT USED – LANA '1



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Other Response	7.0%	4.4%			0.0%	0.0%		
Full-face snorkel mask	5.4%	8.7%			0.0%	0.0%		
2-Piece, separate mask & snorkel	87.6%	86.9%			100.0%	100.0%		
BASE	41	46			2	1		

# SNORKELING EQUIPMENT USED – LANA‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
No, I did not have to be assisted or rescued	97.7%	97.8%	0.0%	0.0%	100.0%	100.0%	0.0%	0.0%
Yes, while using a 2 piece mask & snorkel	2.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while using a full face snorkel mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sample sizes for Lāna‘i are small with none of the markets exceeding 100 visitors.



Note: Due to fielding limitations related to the COVID-19 pandemic, data were not available for the full year 2020 for all surveyed markets. All eight visitor markets were included in data for Q1 2020; only data from the U.S. West and U.S. East were available for all four quarters of 2020. Therefore, some results are presented with relatively small sample sizes compared to prior years and these small sample sizes produced statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

## SECTION – 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.

Visitor Market	Completed	Margin of Error $\pm$
US West	4,685	1.43
US East	4,312	1.49
Japan <sup>1</sup>	1,913	2.24
Canada <sup>1</sup>	727	3.63
Europe <sup>1</sup>	218	6.64
Oceania <sup>1</sup>	310	5.57
China <sup>1</sup>	67	11.97
Korea <sup>1</sup>	289	5.76
<b>All visitor markets</b>	12,521	0.88

<sup>1</sup>Includes data collected in Q1 2020 only.

\*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.

Visitor Market	Completed	Margin of Error $\pm$
US West	1,784	2.32
US East	963	3.16
Japan <sup>1</sup>	13	27.18
Canada <sup>1</sup>	270	5.96
Europe <sup>1</sup>	49	14.00
Oceania <sup>1</sup>	29	18.20
China <sup>1</sup>	1	98.00
Korea <sup>1</sup>	10	30.99
<b>All visitor markets</b>	<b>3,119</b>	<b>1.75</b>

<sup>1</sup>Includes data collected in Q1 2020 only.

\*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.

Visitor Market	Completed	Margin of Error $\pm$
US West	4,183	1.52
US East	2,231	2.07
Japan <sup>1</sup>	34	16.81
Canada <sup>1</sup>	567	4.12
Europe <sup>1</sup>	144	8.17
Oceania <sup>1</sup>	35	16.56
China <sup>1</sup>	13	27.18
Korea <sup>1</sup>	41	15.31
<b>All visitor markets</b>	<b>7,338</b>	<b>1.14</b>

<sup>1</sup>Includes data collected in Q1 2020 only.  
\*Margins of error are presented at the 95 percent level of confidence.

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MOLOKA‘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 Moloka‘i.

Visitor Market	Completed	Margin of Error $\pm$
US West	100	9.80
US East	102	9.70
Japan <sup>1</sup>	6	40.01
Canada <sup>1</sup>	8	34.65
Europe <sup>1</sup>	4	49.00
Oceania <sup>1</sup>	0	-
China <sup>1</sup>	0	-
Korea <sup>1</sup>	0	-
<b>All visitor markets</b>	<b>220</b>	<b>6.61</b>

<sup>1</sup>Includes data collected in Q1 2020 only.

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (LANA‘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 Lana‘i.

Visitor Market	Completed	Margin of Error $\pm$
US West	92	10.22
US East	109	9.39
Japan <sup>1</sup>	1	98.00
Canada <sup>1</sup>	11	29.55
Europe <sup>1</sup>	6	40.01
Oceania <sup>1</sup>	1	98.00
China <sup>1</sup>	0	-
Korea <sup>1</sup>	0	-
<b>All visitor markets</b>	220	

<sup>1</sup>Includes data collected in Q1 2020 only.

\*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.

Visitor Market	Completed	Margin of Error $\pm$
US West	2,391	2.00
US East	1,422	2.60
Japan <sup>1</sup>	408	4.85
Canada <sup>1</sup>	503	4.37
Europe <sup>1</sup>	111	9.30
Oceania <sup>1</sup>	36	16.33
China <sup>1</sup>	27	18.86
Korea <sup>1</sup>	64	12.25
<b>All visitor markets</b>	<b>4,962</b>	<b>1.39</b>

<sup>1</sup>Includes data collected in Q1 2020 only.

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