

VISITOR SATISFACTION AND ACTIVITY STUDY

2021 ANNUAL REPORT

State of Hawai'i
Department of Business, Economic Development & Tourism

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Survey Methodology

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Due to COVID-19 pandemic travel restrictions and limited flights to Hawai'i from Canada, China, Japan, Korea and Oceania, only visitors from the United States were interviewed in 2021. The sampled visitor markets in 2021 included: 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.).

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	6,775	1.19%	18.87%
U.S. East	6,473	1.22%	18.54%
All visitor markets	13,248	0.85%	18.71%

Survey Methodology (cont.)

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

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

Effect of COVID-19 Pandemic

COVID-19 Travel Restrictions

As noted earlier, concerns around the continuing COVID-19 pandemic resulted in significant travel restrictions and limited flights to Hawai'i from Canada, China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey in 2021.

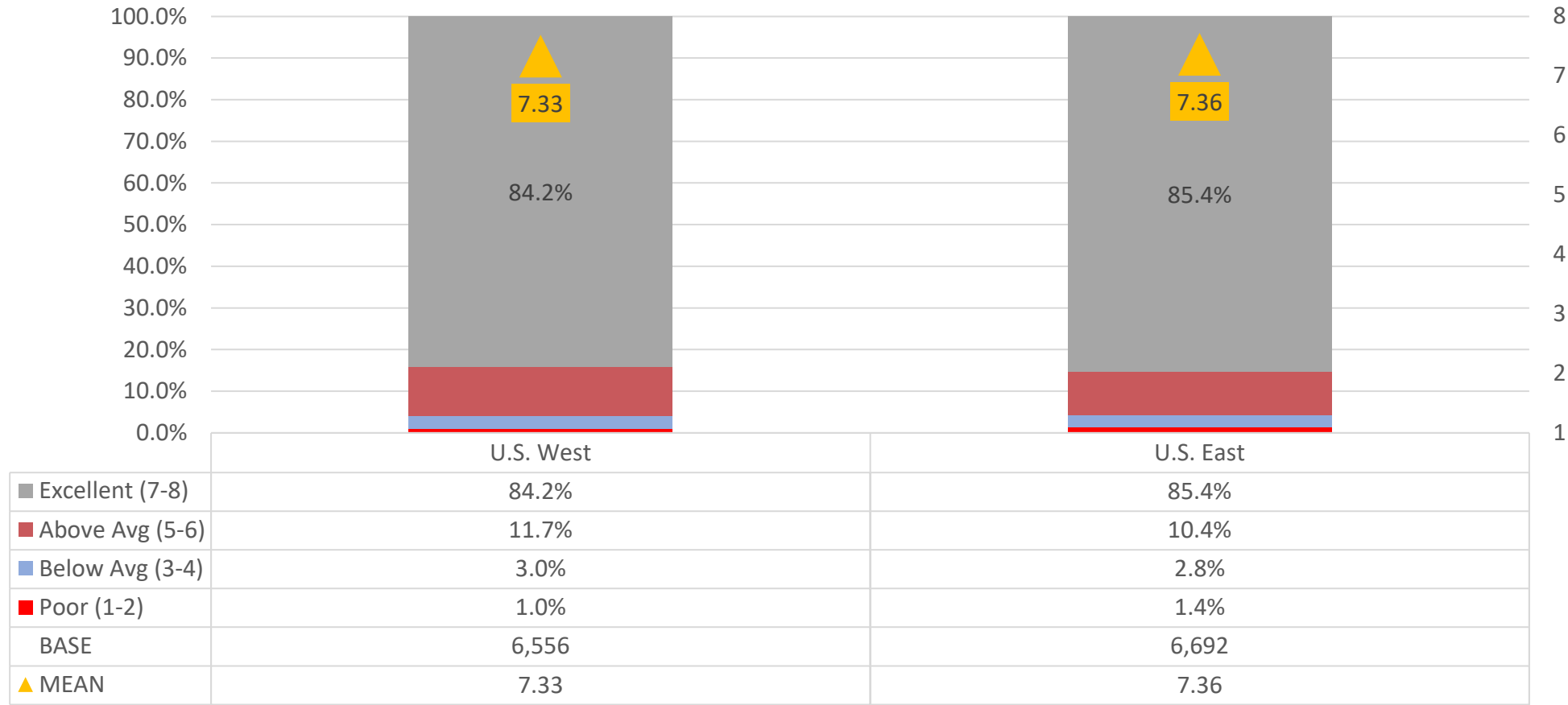
State of Hawai'i Safe Travels Program

Originally launched on March 26, 2020, the State of Hawai'i Safe Travels program continued to evolve over the course of the COVID-19 pandemic, originally requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. At the start of 2021, visitors and returning residents were required to show 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 or quarantine for 10 days. By July 8, 2021, the State of Hawai'i launched a vaccination exception program for domestic, Hawai'i-bound travelers vaccinated in the United States or U.S Territories that allowed these travelers to bypass the state's quarantine requirement with proof of vaccination.

Section – Visitor Satisfaction

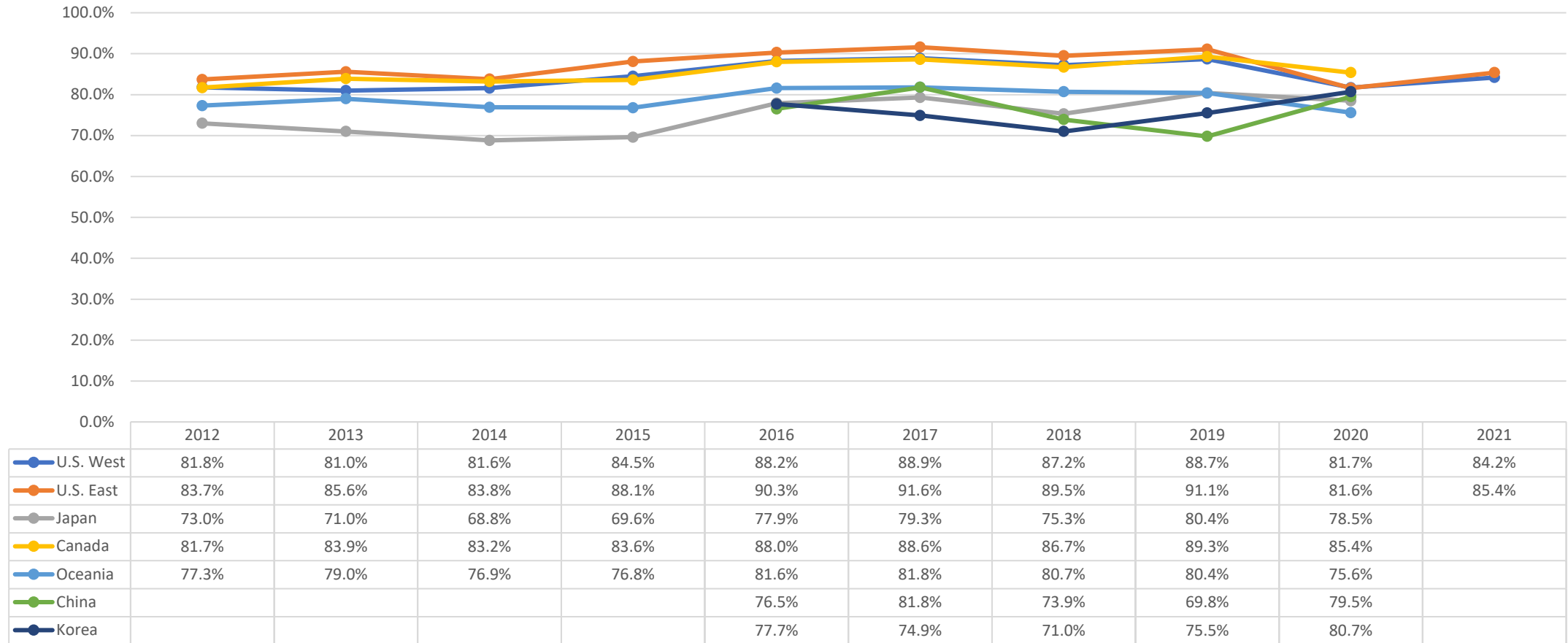
Satisfaction - State of Hawai'i by Visitor Market

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



Satisfaction - State of Hawai'i by Visitor Market

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

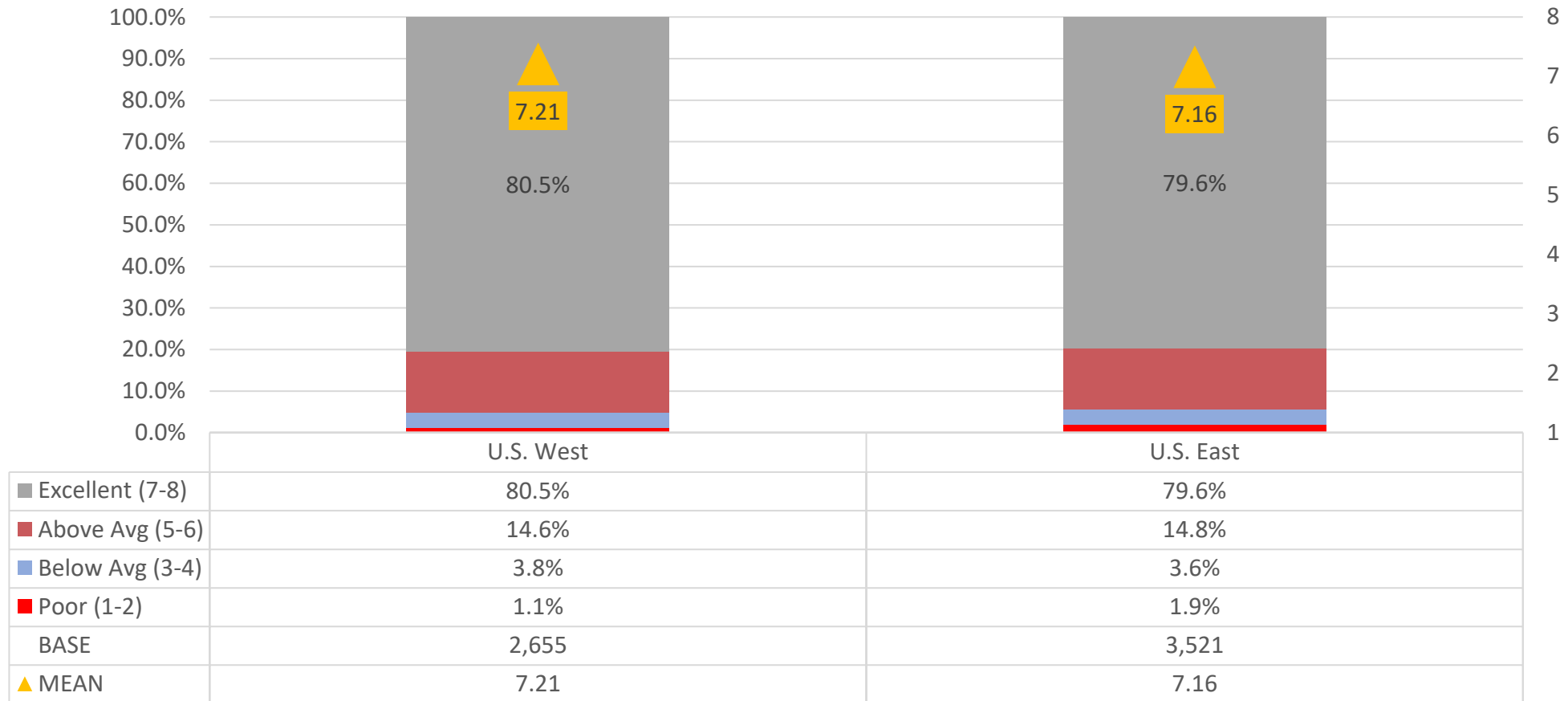


Satisfaction - State of Hawai'i by Visitor Market

- ***Trips to Hawai'i:*** First-time visitors from U.S. East were more satisfied with their most recent trip to Hawai'i compared to repeat visitors.
- ***Age:*** Amongst visitors from U.S. West and U.S. East, satisfaction was highest amongst younger travelers (those under the age of 35).
- ***Gender:*** Female travelers from both U.S. West and U.S. East were more satisfied than their male counterparts.
- ***Household income:*** Less affluent travelers from U.S. West and U.S. East gave higher satisfaction mean scores for their most recent trip.
- ***Islands visited:*** Visitors from U.S. West whose trip consisted of staying on a single island had higher overall satisfaction than those who stayed on multiple islands.

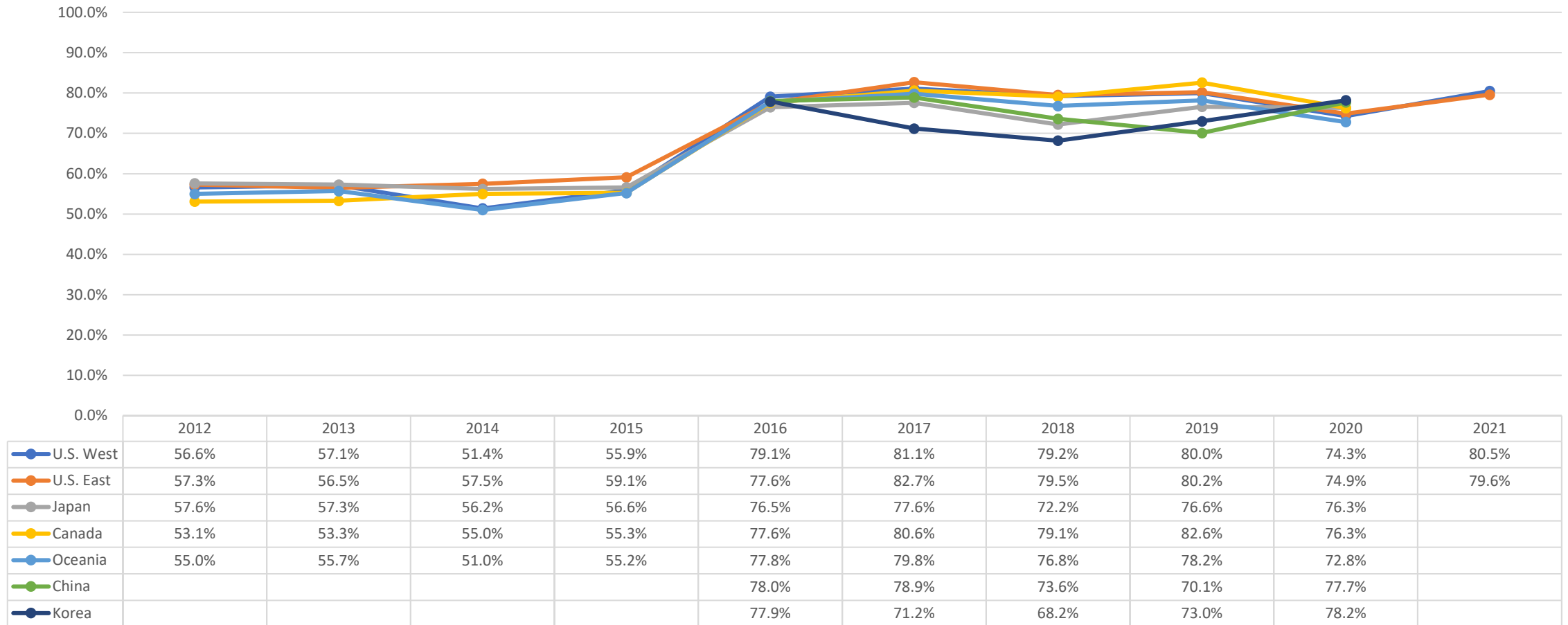
SATISFACTION - O'AHU

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



SATISFACTION - O'AHU

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

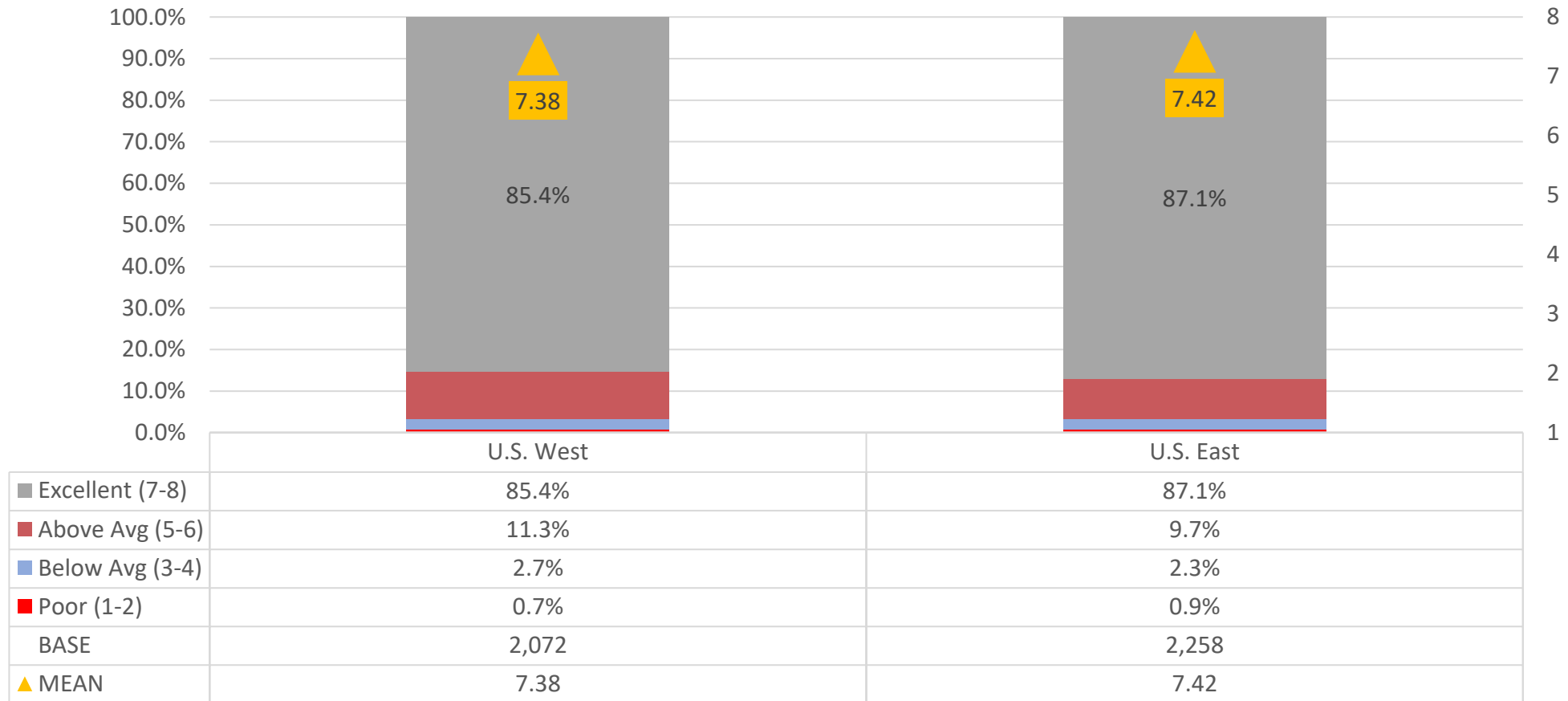


SATISFACTION - O'AHU

- **Islands visited:** Visitors from U.S. West and U.S. East who stayed entirely on O'ahu gave higher satisfaction scores to that island, compared to those who also visited a Neighbor Island.
- **Trips to Hawai'i:** First-time visitors from both U.S. West and U.S. East were more satisfied with their stay on O'ahu compared to repeat visitors.
- **Age:** When segmented by age, younger travelers from both U.S. West and U.S. East under the age of 35 were the most satisfied with their stay.
- **Gender:** Female visitors from both U.S. West and U.S. East gave higher satisfaction scores than male visitors.
- **Household income:** Visitors from U.S. East and U.S. West in the bottom incomes tier (<\$100K) expressed the highest levels of satisfaction compared to those in households with combined incomes in excess of \$150K.

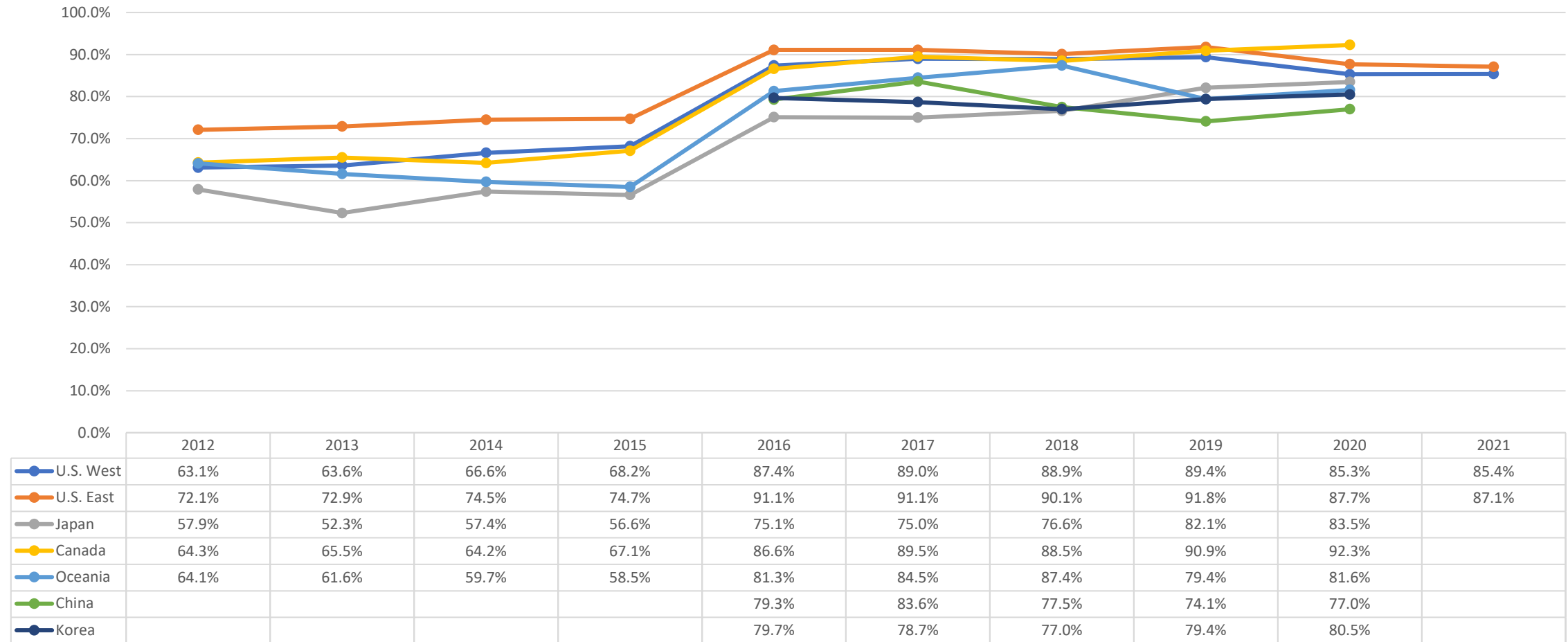
SATISFACTION - MAUI

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



SATISFACTION - MAUI

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

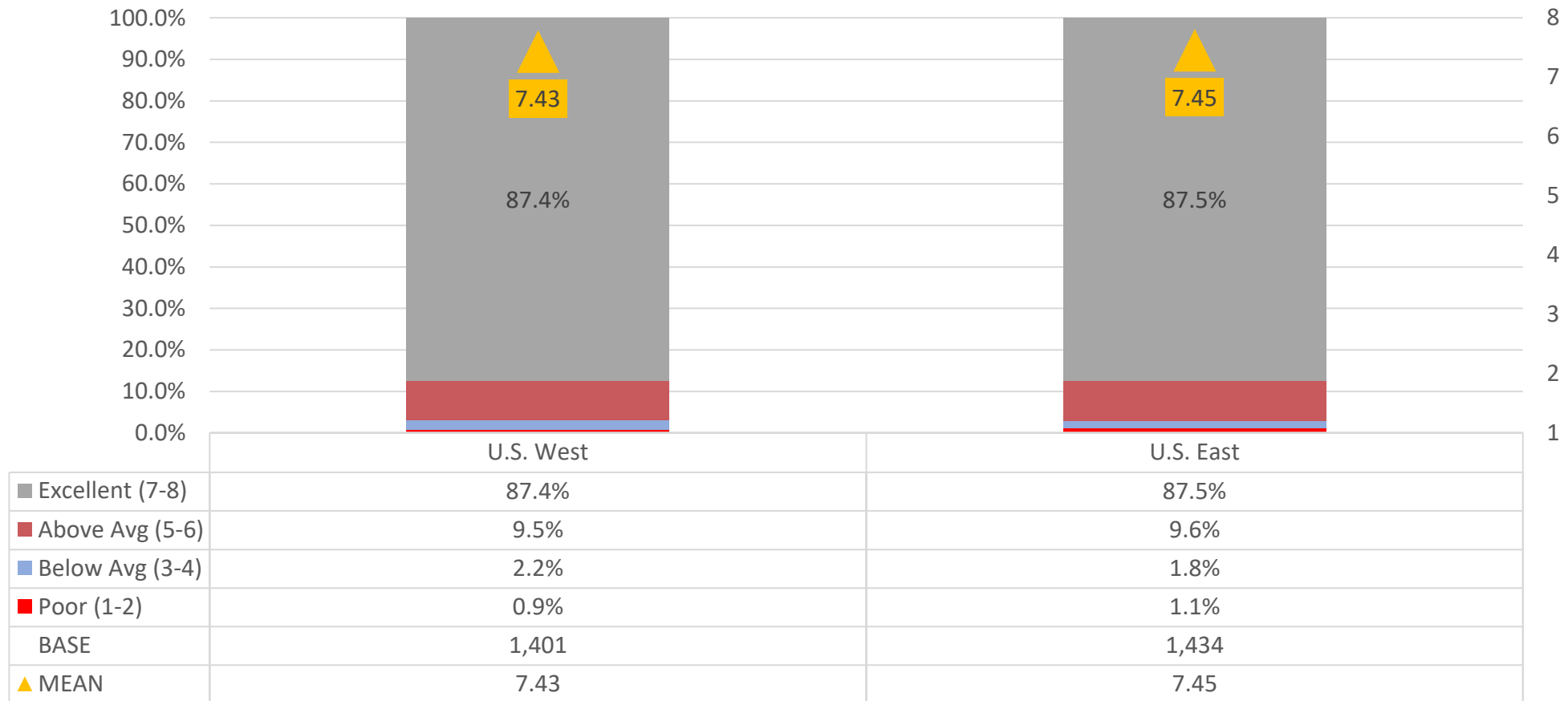


SATISFACTION - MAUI

- **Islands visited:** Visitors from U.S. West who stayed entirely on Maui gave higher satisfaction scores to that island compared to those who visited multiple islands.
- **Trips to Hawai'i:** First-time visitors to Maui from both U.S. West and U.S. East were more satisfied with their stay compared to repeat visitors.
- **Age:** Younger visitors to Maui, under the age of 35 expressed the highest degrees of satisfaction with their stay on the island.
- **Gender:** Female respondents from both U.S. West and U.S. East have higher satisfaction scores for their stay on Maui compared to male respondents.
- **Household income:** Visitors from U.S. East in the bottom income tier (<\$100K) expressed higher levels of satisfaction with their stay on Maui compared to those in households earning in excess of \$150K.

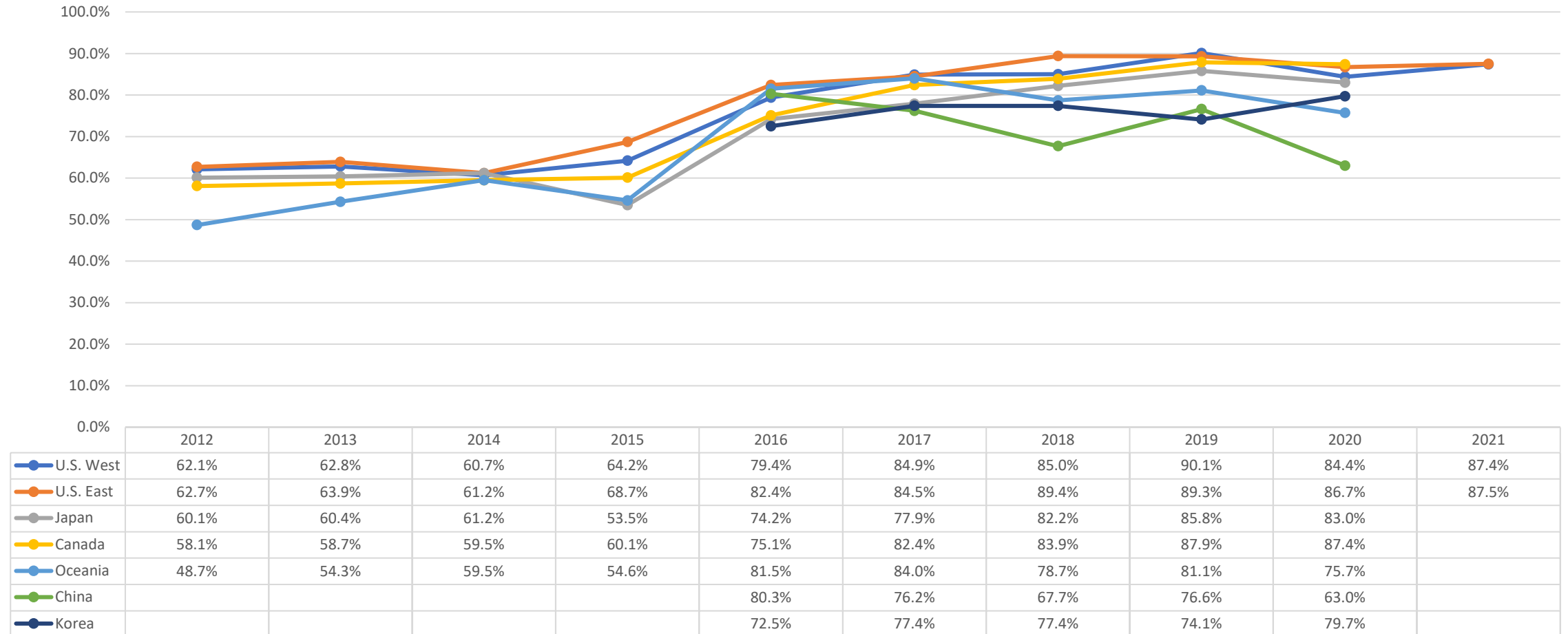
SATISFACTION - ISLAND OF HAWAI'I

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



SATISFACTION - ISLAND OF HAWAI'I

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

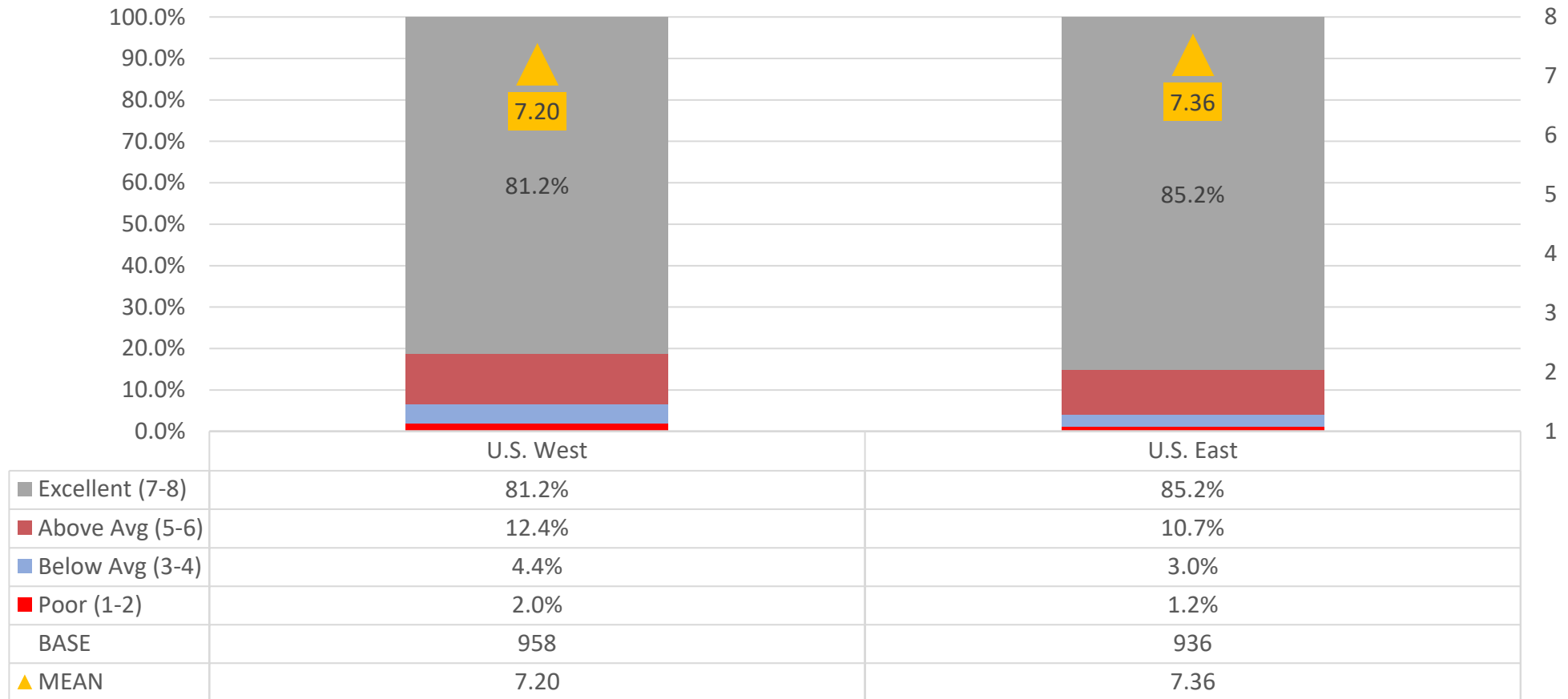


SATISFACTION - HAWAI'I ISLAND

- **Islands visited:** Visitors from U.S. West and U.S. East who stayed entirely on Hawai'i Island gave higher satisfaction scores to that island compared to those who visited multiple islands.
- **Gender:** Female respondents from both U.S. West and U.S. East gave higher satisfaction scores than male respondents.

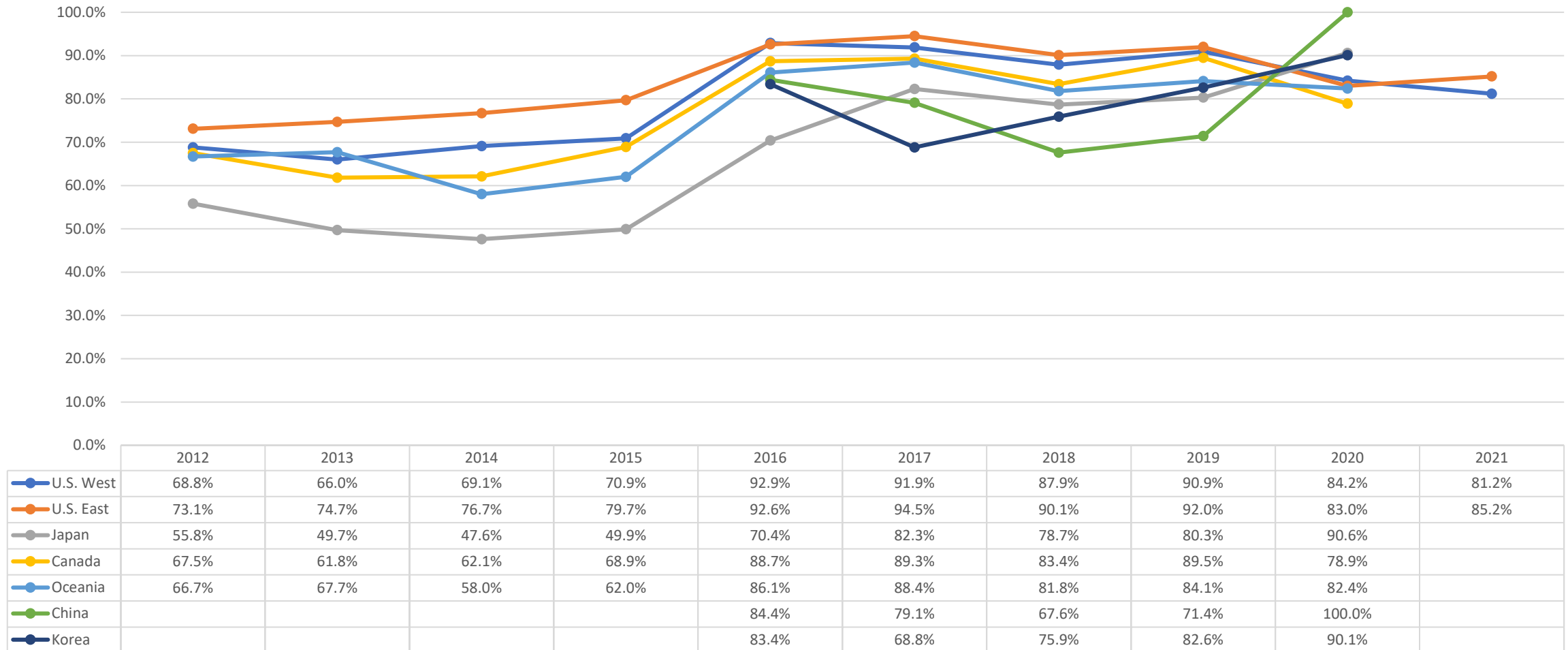
SATISFACTION - KAUA'I

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



SATISFACTION - KAUUA'I

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

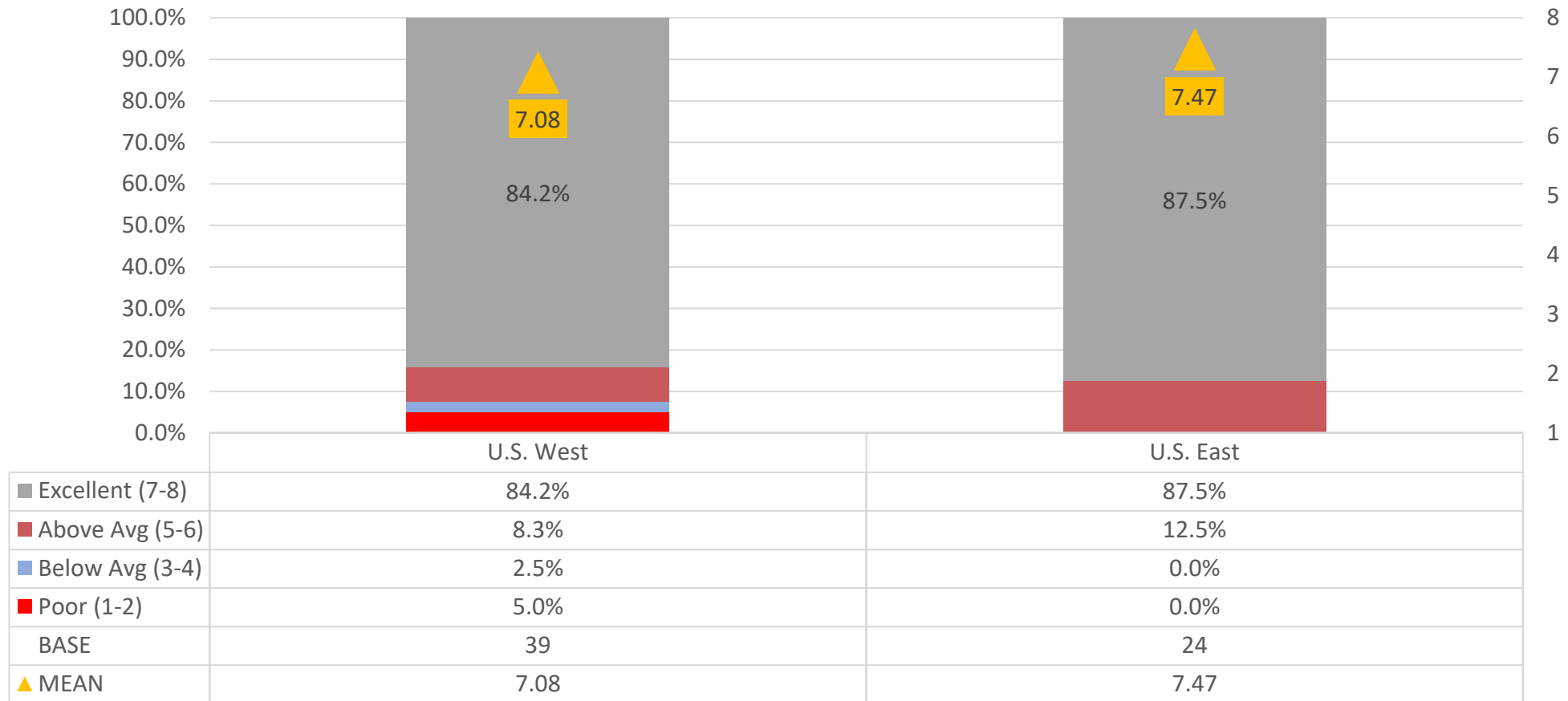


SATISFACTION - KAUA'I

- **Age:** Amongst respondents from U.S. East, satisfaction was highest amongst younger visitors under the age of 35. Amongst U.S. West visitors, the highest satisfaction mean scores were from those between 35 and 49 years old.
- **Trips to Hawai'i:** First-time visitors to Kaua'i from U.S. East were more satisfied with their stay on that island compared to repeat visitors.
- **Gender:** Female respondents from both U.S. West and U.S. East gave higher satisfaction scores compared to male respondents.

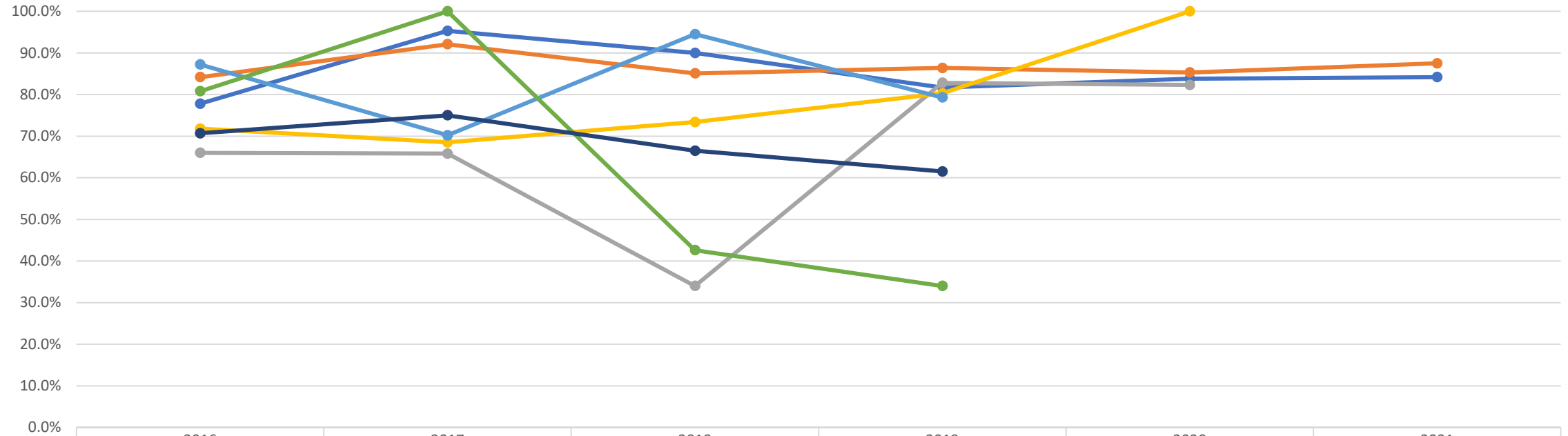
SATISFACTION - MOLOKA'I

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



SATISFACTION - MOLOKA'I

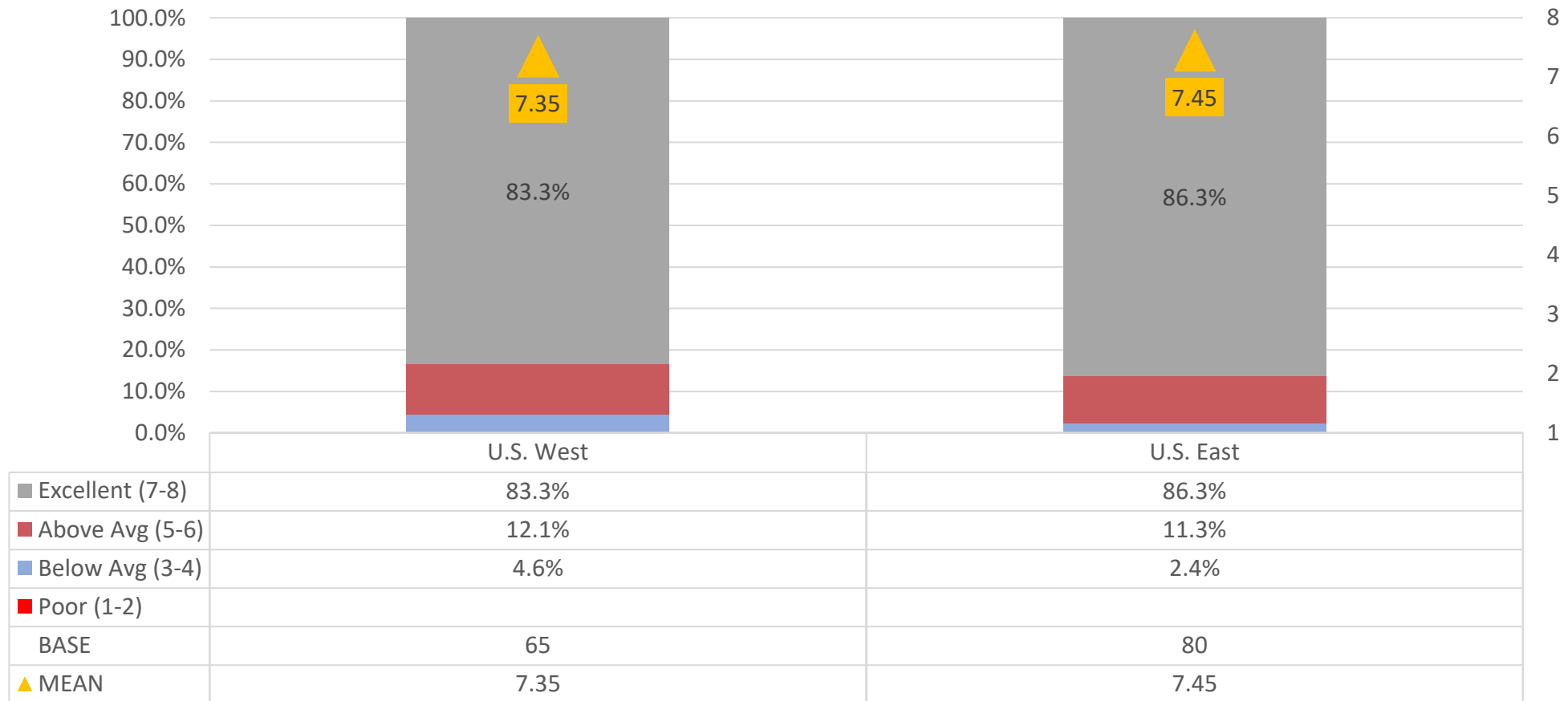
Tracking Data – Rating of “Excellent” (7-8)



	2016	2017	2018	2019	2020	2021
U.S. West	77.8%	95.3%	90.0%	81.7%	83.8%	84.2%
U.S. East	84.2%	92.1%	85.1%	86.4%	85.3%	87.5%
Japan	66.0%	65.8%	34.0%	82.8%	82.3%	
Canada	71.8%	68.5%	73.4%	80.3%	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%		

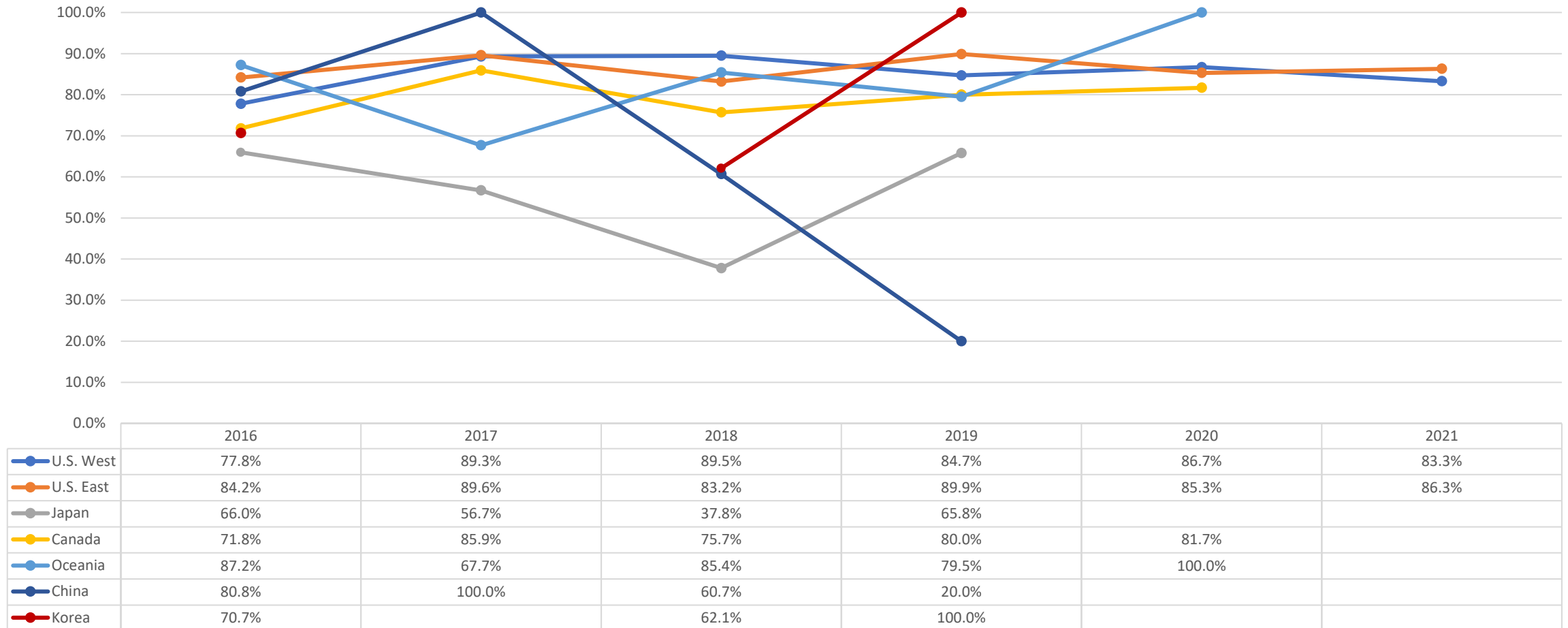
SATISFACTION - LANA'I

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



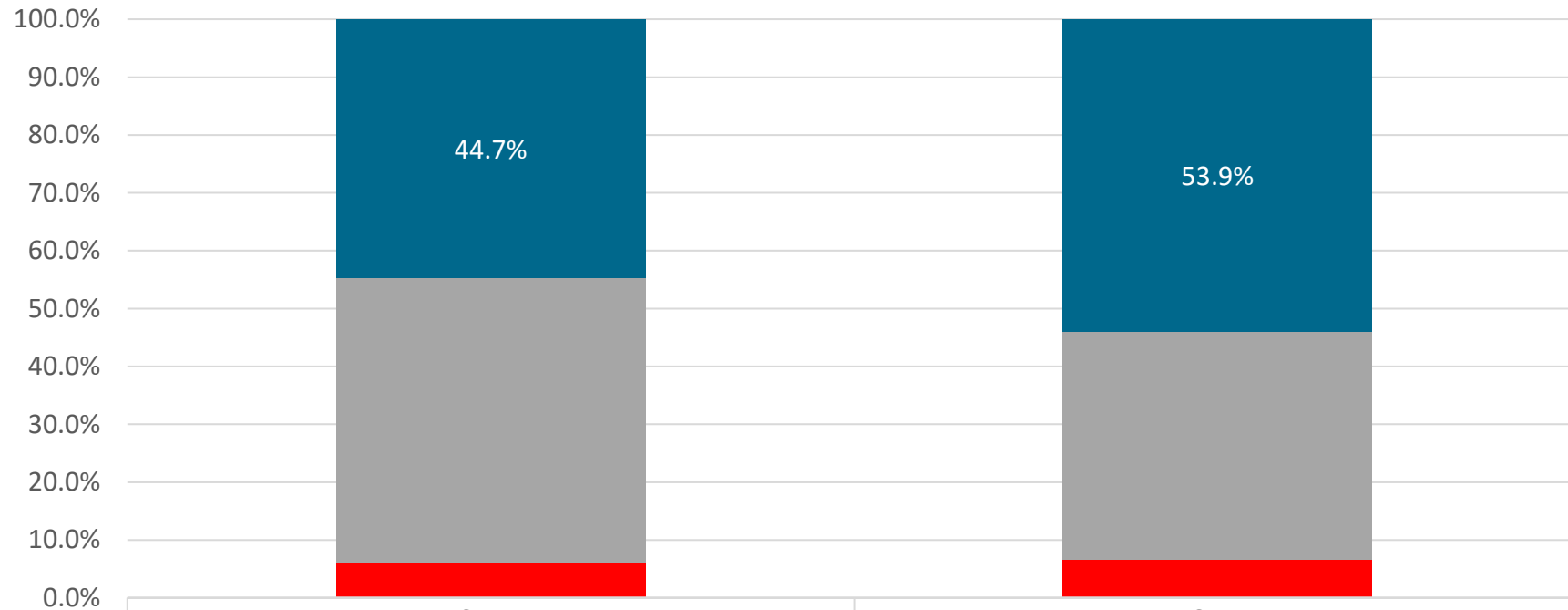
SATISFACTION - LANAI'I

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



Section – Trip Expectations

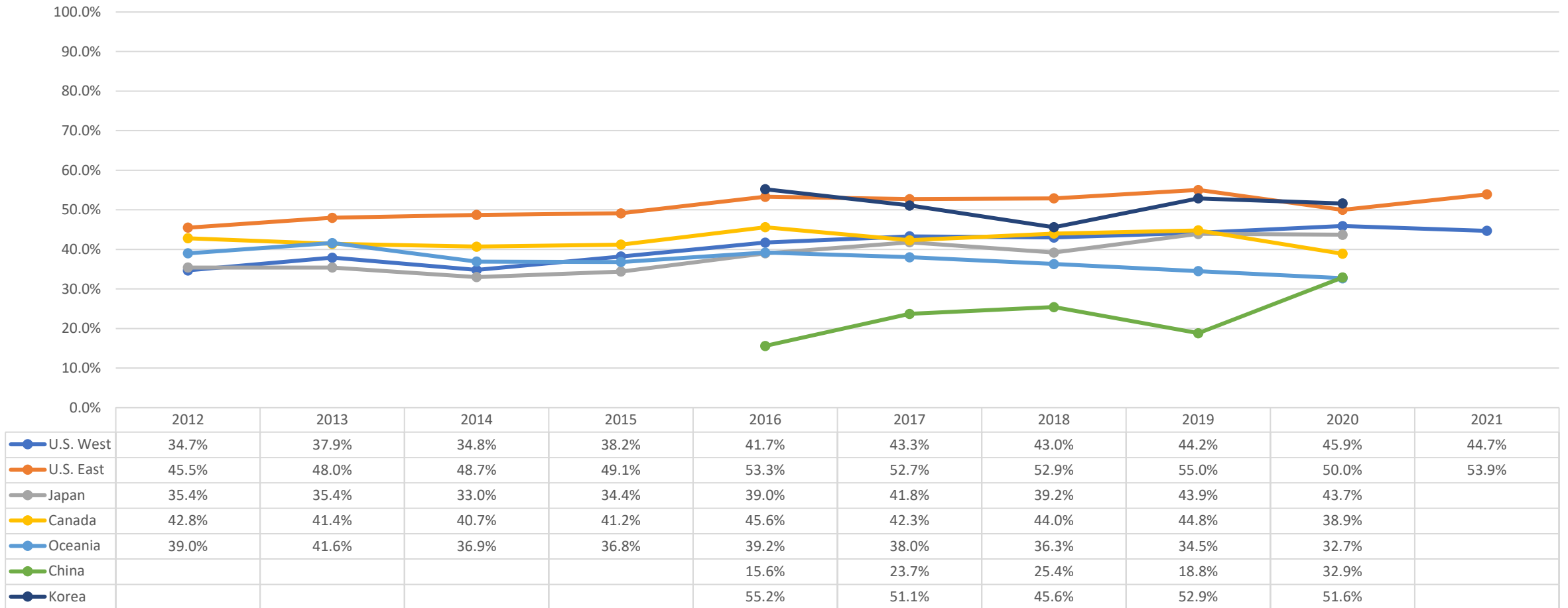
SATISFACTION - HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East
Exceeded expectations	44.7%	53.9%
Met expectations	49.4%	39.5%
Did NOT meet expectations	5.9%	6.6%
BASE	6,556	6,692

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



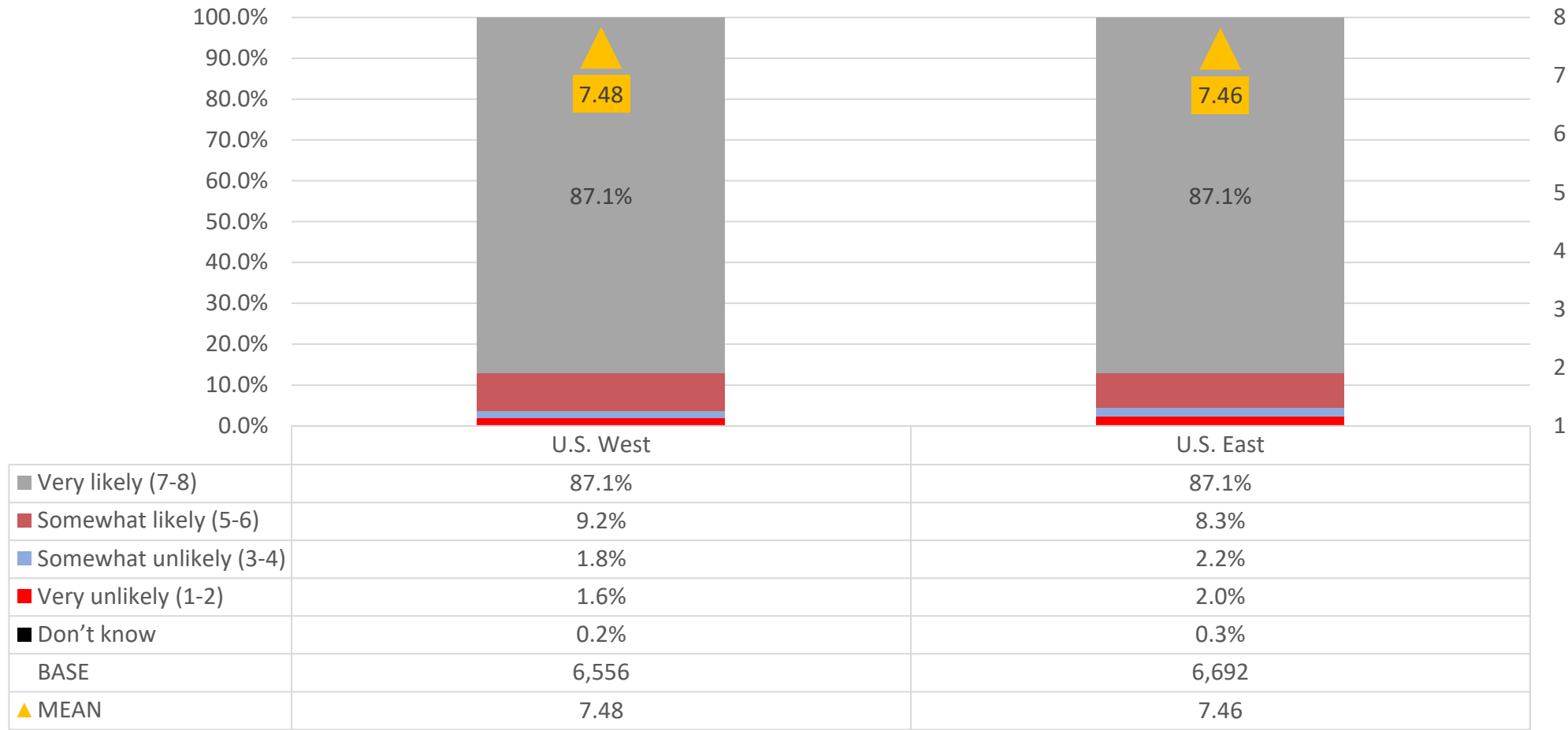
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- **Education:** Visitors with a college degree from U.S. East were more satisfied with their trip compared to those without a college degree.
- **Age:** For both U.S. East and U.S. West visitor markets, satisfaction in terms of expectations were lowest amongst seniors 65 and older. Conversely, scores were highest amongst younger visitors under the age of 35.
- **Gender:** Female respondents gave higher satisfaction scores compared to male respondents from both U.S. West and U.S. East.
- **Hawai'i trips:** First-time visitors from both U.S. visitor markets gave higher satisfaction scores than repeat visitors.
- **Household income:** Less affluent visitors or those in households with combined incomes below \$100K were the most satisfied when it came to trip expectations in both U.S. West and U.S. East markets.

Section – Brand/ Destination Advocacy

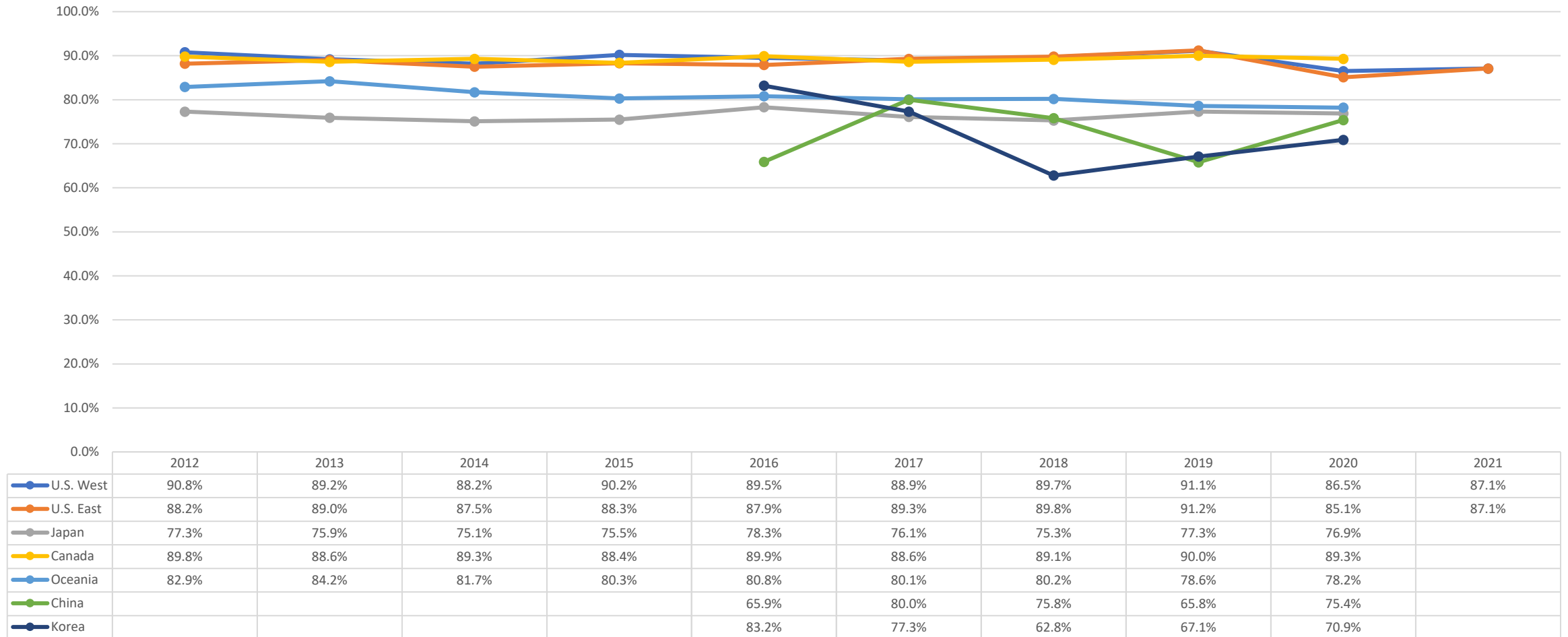
BRAND/ DESTINATION - ADVOCACY

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



BRAND/ DESTINATION - ADVOCACY

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



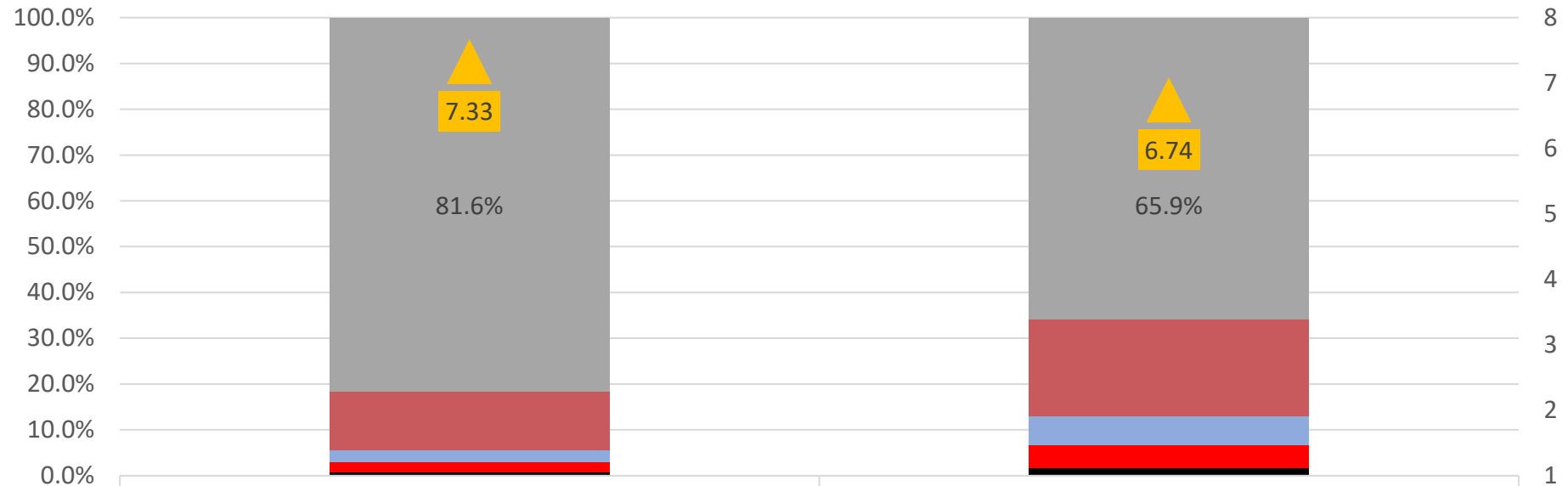
BRAND/ DESTINATION - ADVOCACY

- **Age:** Amongst respondents from U.S. East, younger visitors or those under the age of 35 were the strongest brand advocates for Hawai'i.
- **Household income:** Brand advocacy was higher amongst less affluent respondents. Visitors from both U.S. West and U.S. East in the bottom income tier (<\$100K) were the most likely to recommend travel to the state. Conversely, brand advocacy in both U.S. markets was lowest amongst affluent travelers or those in households with combined incomes greater than \$150K.
- **Gender:** Female visitors from U.S. West, U.S. East, gave higher scores indicating a greater likelihood to recommend travel to the state compared to male visitors.
- **Trips to Hawai'i:** Amongst respondents from U.S. East, first-time visitors were more likely to recommend travel here to others than repeat visitors.
- **Islands visited:** Respondents from U.S. West whose trip consisted of visiting a single island were more likely to recommend Hawai'i to others than those who visited multiple islands.

Section – Brand/ Destination Loyalty

LIKELIHOOD OF RETURN VISIT

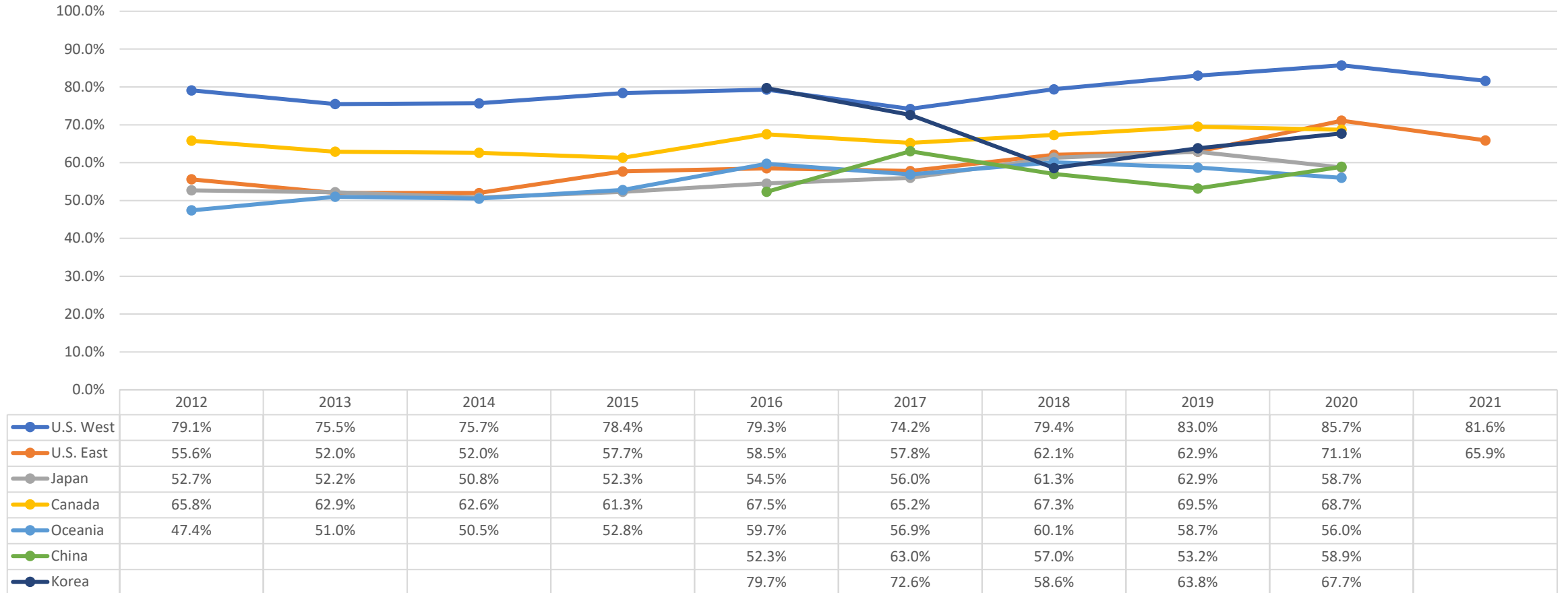
8-pt Rating Scale
8=Very likely / 1=Very unlikely



	U.S. West	U.S. East
Very likely (7-8)	81.6%	65.9%
Somewhat likely (5-6)	12.8%	21.1%
Somewhat unlikely (3-4)	2.5%	6.4%
Very unlikely (1-2)	2.3%	4.9%
Don't know	0.7%	1.7%
BASE	6,556	6,692
MEAN	7.33	6.74

LIKELIHOOD OF RETURN VISIT

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



LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from both U.S. West and U.S. East expressed a greater likelihood to return to the state than first-time visitors.
- ***Islands visited:*** Respondents from U.S. East whose trip consisted of a visit to a single island expressed a greater likelihood to return compared to those who visited multiple islands.
- ***Gender:*** Female respondents from both U.S. West and U.S. East were more likely to return compared to male respondents.
- ***Household income:*** Travelers from U.S. West in more affluent households expressed a higher likelihood of returning to the state than less affluent travelers. The opposite was true amongst visitors from U.S. East where those in less affluent households expressed a stronger likelihood to return to the state.
- ***College graduate:*** U.S. East visitors without a college degree gave higher mean scores than visitors with a college degree.
- ***Travel party size:*** In both U.S. East and U.S. West, those in smaller travel parties expressed a stronger likelihood of returning to the state.

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

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

2020	2021
31.5% COVID-19/ Pandemic	34.2% Too expensive
29.2% Too expensive	32.5% Want to go someplace new
22.3% Unfriendly people/ felt unwelcome	26.0% Poor value
18.5% Poor value	23.0% COVID-19/ Pandemic
17.5% Want to go someplace new	20.3% Too crowded/ congested/ traffic
13.9% No reason to return/ Nothing new	15.5% Unfriendly people/ felt unwelcome
10.6% Poor service	15.3% No reason to return/ nothing new
10.1% Too crowded/ congested/ traffic	11.3% Too commercialized/ overdeveloped
	10.5% Poor service

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

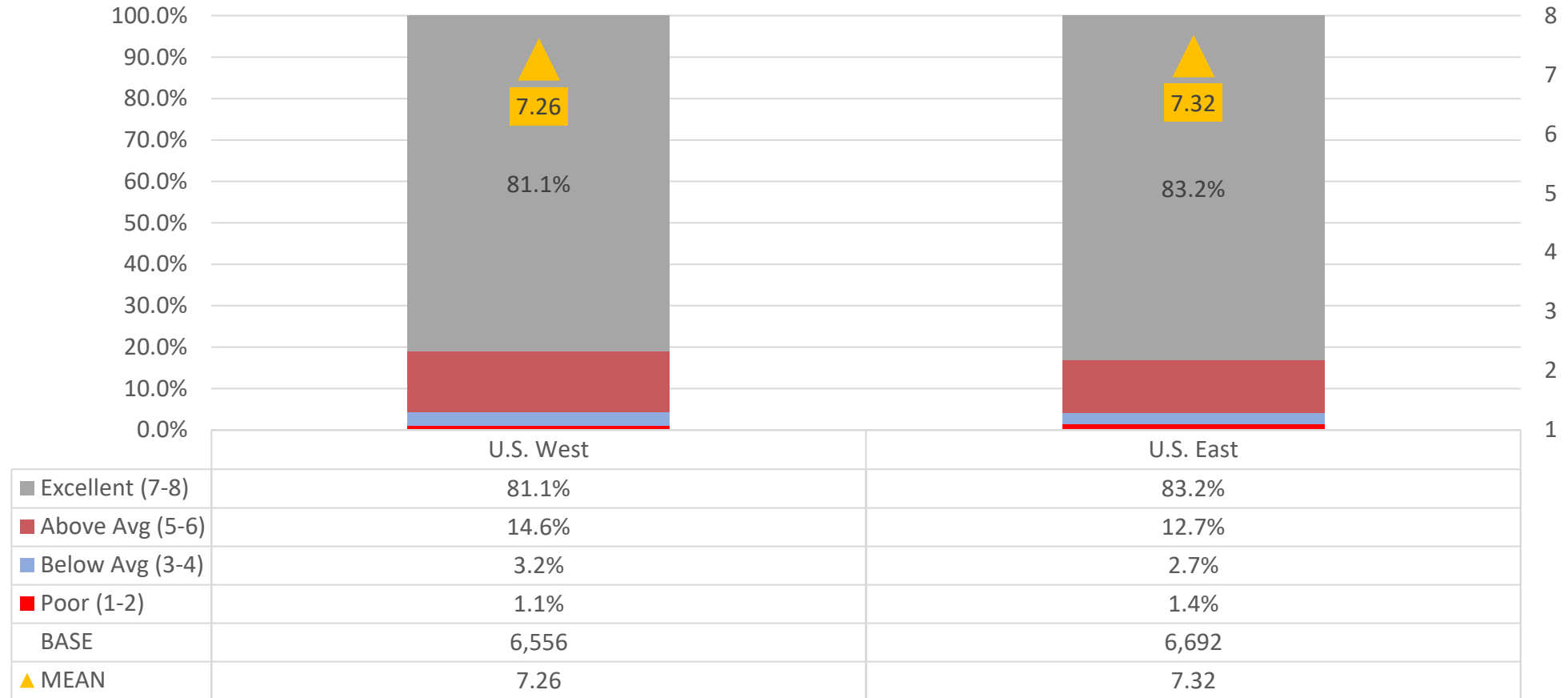
TOP RESPONSES 10%+
ITEMS HIGHLIGHTED IN RED + 5.0 OR GREATER VARIANCE
ITEMS HIGHLIGHTED IN YELLOW -5.0 OR GREATER VARIANCE

2020	2021
36.2% Too expensive	44.3% Too expensive
32.3% Want to go someplace new	31.4% Flight too long
27.3% Flight too long	31.0% Want to go someplace new
19.3% COVID-19/ pandemic	18.4% Poor value
14.4% Poor value	16.5% COVID-19/ pandemic
13.7% Unfriendly people/ felt unwelcome	14.9% Too crowded/ congested
12.2% Five years is too soon	12.7% Five years is too soon
11.6% Other financial obligations	12.0% Unfriendly people/ felt unwelcome
10.3% No reason to return/ nothing new	11.0% Other financial obligations
	10.2% Poor service

Section – Experiences

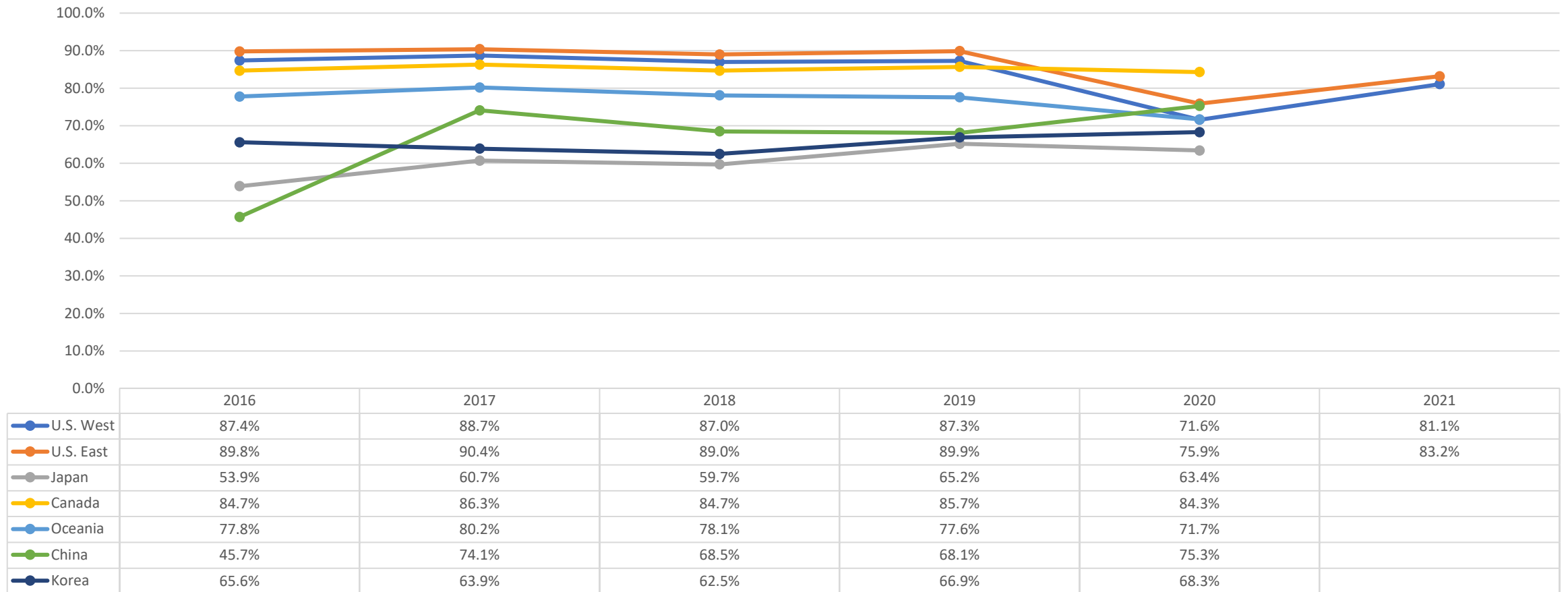
OFFERING A VARIETY OF EXPERIENCES

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



OFFERING A VARIETY OF EXPERIENCES

Tracking Data - Rating of "Excellent" (7-8)

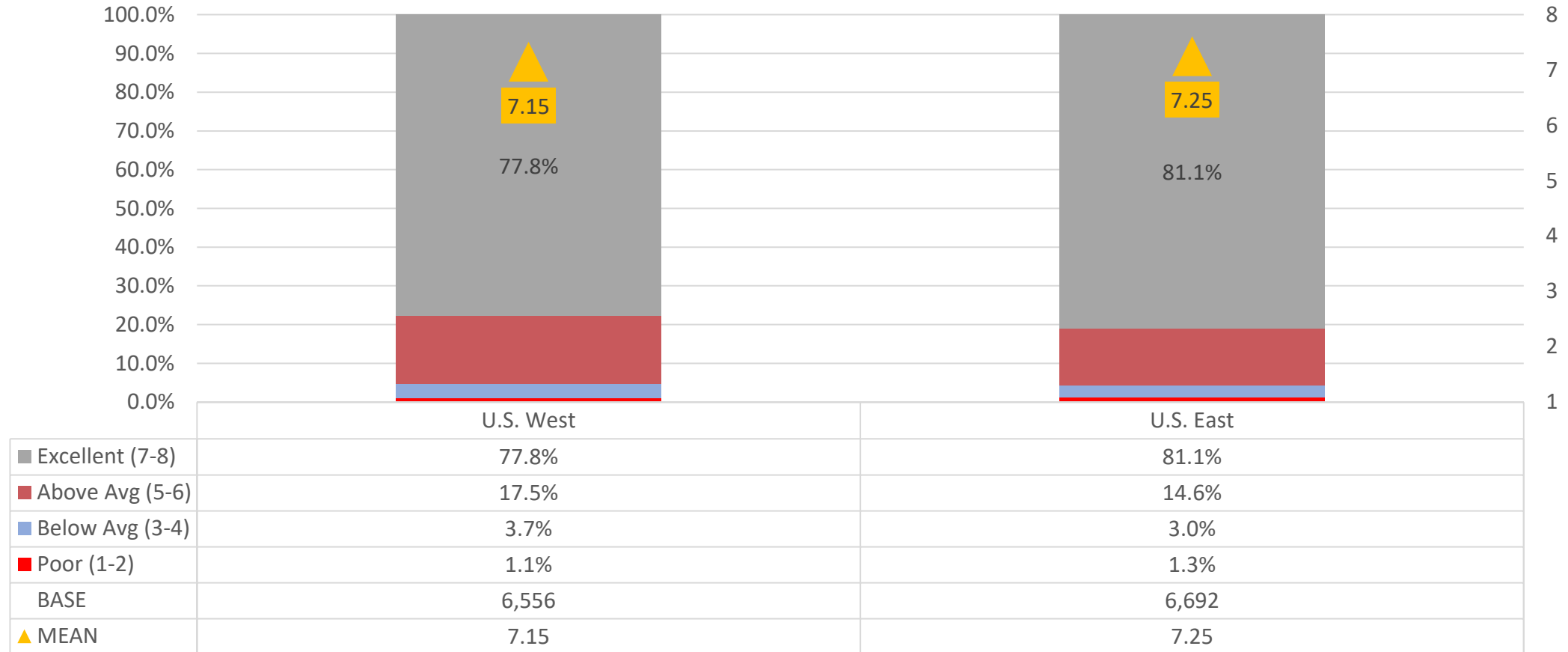


OFFERING A VARIETY OF EXPERIENCES

- **Age:** Younger visitors under the age of 35 from both U.S. West and U.S. East were the most pleased when evaluating their stay based on the variety of experiences offered.
- **Trips to Hawai'i:** First-time visitors from both U.S. West and U.S. East gave higher satisfaction score in this area than repeat visitors.
- **Islands visited:** Travelers from U.S. East whose trip included stays on multiple islands gave higher mean scores compared to those who stayed on a single island.
- **Gender:** Female respondents from both U.S. visitor markets were more satisfied with the variety of experiences than their male counterparts.
- **Household income:** Travelers from both U.S. visitor markets in the bottom income tier (<\$100K) were the most satisfied when it came to rating their satisfaction with the variety of experiences offered during their stay.
- **College graduate:** Visitors from U.S. East with a college degree were more satisfied in this area than those without a college degree.

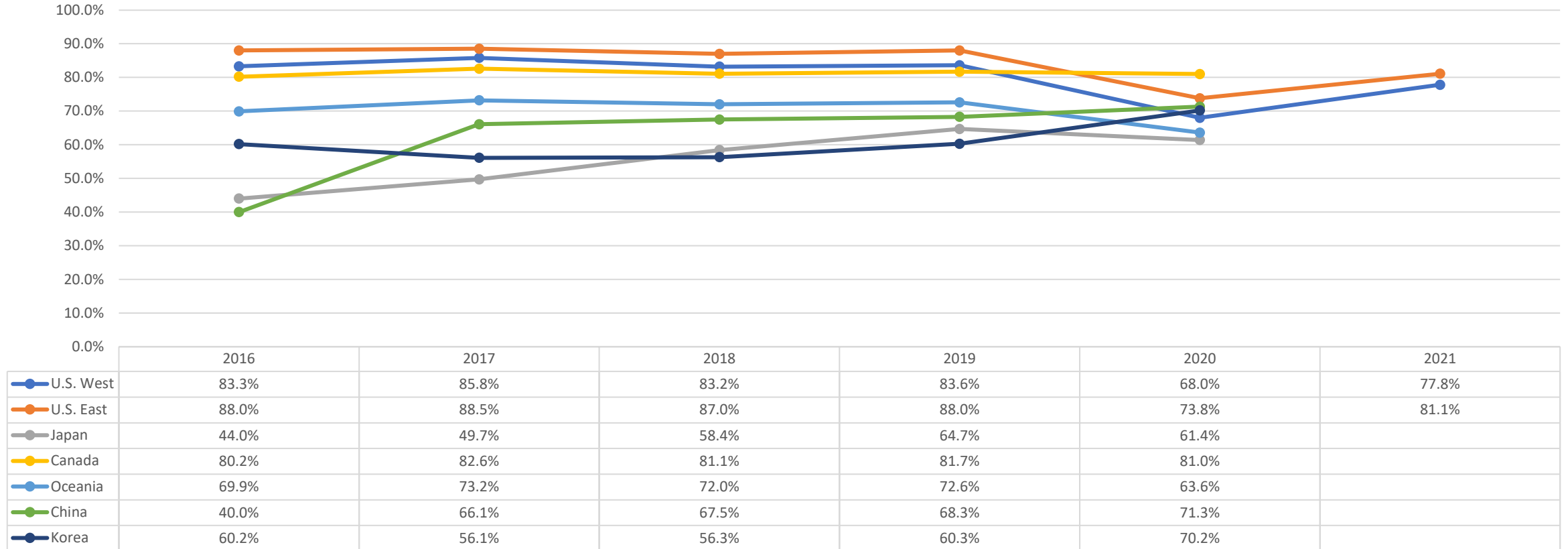
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

Tracking Data - Rating of "Excellent" (7-8)

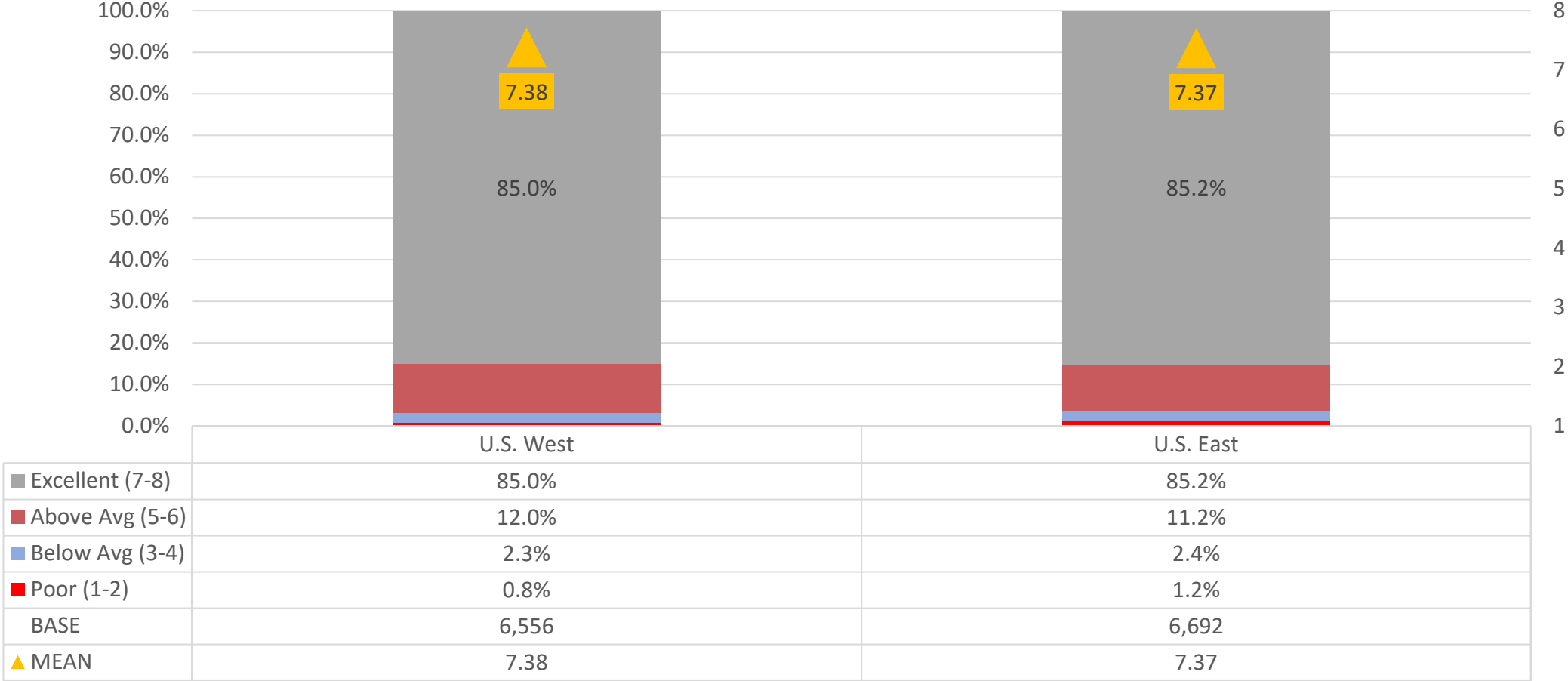


NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

- **Age:** Younger visitors under the age of 35 from both U.S. West and U.S. East were the most pleased when evaluating their stay based on the number of different and unique travel experiences.
- **Trips to Hawai'i:** First-time visitors from both U.S. West and U.S. East gave higher satisfaction score in this area than repeat visitors.
- **Islands visited:** Visitors from U.S. East whose trip included stays on multiple islands gave higher mean scores compared to those who stayed on a single island.
- **Gender:** Female respondents from both U.S. visitor markets were more satisfied with the number of different and unique experiences than their male counterparts.
- **Household income:** Respondents from both U.S. visitor markets in the bottom income tier (<\$100K) were the most satisfied with the number of different and unique experiences offered during their stay.
- **College graduate:** Visitors from U.S. East with a college degree were more satisfied in this area than those without a college degree.

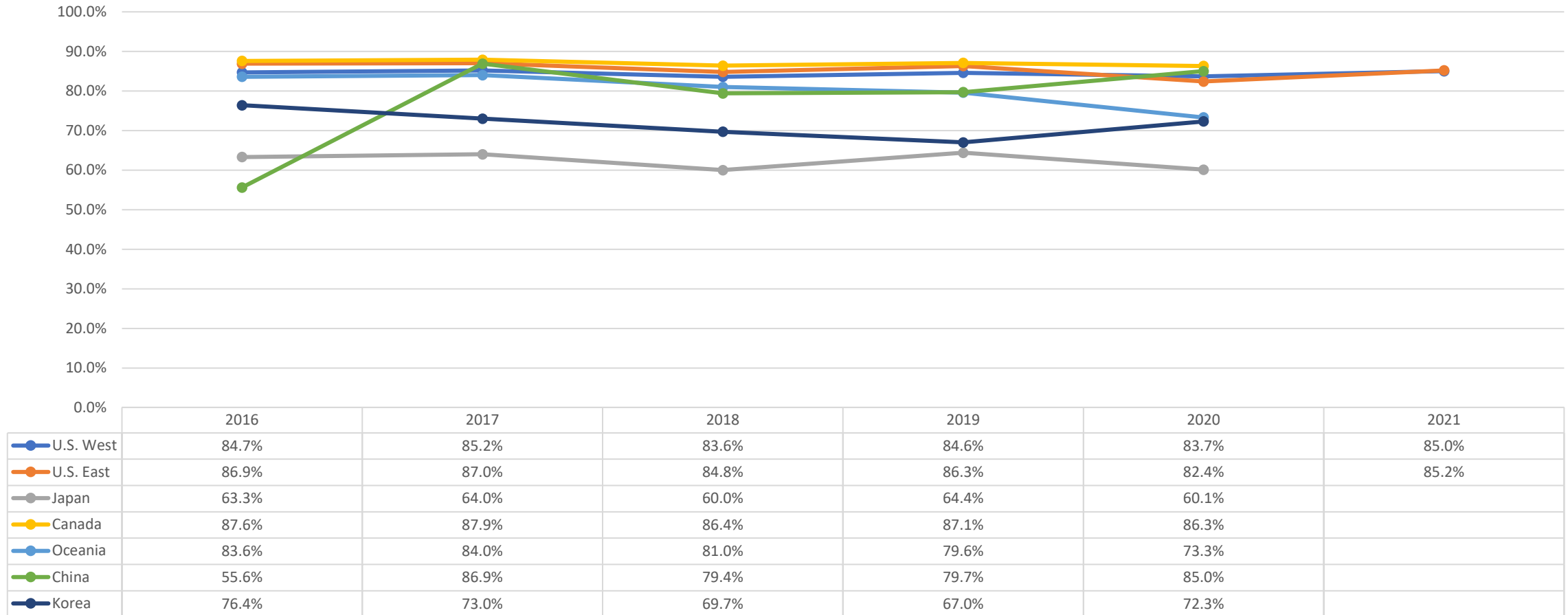
SAFE AND SECURE DESTINATION

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



SAFE AND SECURE DESTINATION

Tracking Data - Rating of "Excellent" (7-8)



SAFE AND SECURE DESTINATION

- **Age:** Younger visitors under the age of 35 from U.S. East were the most pleased when evaluating their stay based on whether or not they felt safe and secure.
- **Trips to Hawai'i:** First-time visitors from U.S. East gave higher satisfaction score in this area than repeat visitors.
- **Islands visited:** Visitors from U.S. East whose trip included stays on multiple islands gave higher mean scores compared to those who stayed on a single island.
- **Gender:** Female respondents from both U.S. visitor markets were more satisfied with feeling safe and secure during their stay than their male counterparts.
- **College graduate:** Visitors from U.S. East with a college degree were more satisfied in this area than those without a college degree.

Section – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	94.8%	96.4%
On own (self guided)	83.0%	83.2%
Helicopter/ airplane	3.3%	6.7%
Boat/ submarine/ whale	27.8%	35.4%
Visit towns	50.7%	53.8%
Limo/ van/ bus tour	5.9%	12.5%
Scenic views/ natural landmark	59.4%	68.9%
Movie/ TV/ film location	4.2%	6.2%

ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	88.6%	89.7%
Bodyboard	14.0%	9.2%
Stand up paddle board	7.4%	6.6%
Surfing	8.4%	9.0%
Canoeing/ kayak	8.5%	8.5%
Swim ocean	72.6%	72.1%
Snorkel	52.3%	49.5%
Freediving	1.8%	1.7%
Windsurf/ Kitesurf	0.3%	0.2%
Jet ski/ Parasail	1.9%	2.6%
Scuba	3.1%	3.5%
Fishing	3.1%	3.4%
Golf		

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	34.3%	31.9%
Spa	8.8%	9.8%
Hiking	47.7%	56.0%
Backpack/Camping	1.4%	2.1%
Agritourism	10.5%	13.5%
Sport event/ tournament	0.6%	0.6%
Park/ botanical garden	33.1%	41.8%
Waterpark	1.2%	1.2%
Mountain tube/ waterfall rappel	1.4%	1.6%
Zip lining	4.7%	4.9%
Skydiving	0.4%	0.7%
All terrain vehicle (ATV)	4.1%	5.4%
Horseback riding		

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.1%	99.0%
Lunch/ sunset/ dinner/ evening cruise	21.2%	27.2%
Live music/ stage show	20.4%	28.4%
Nightclub/ dancing/ bar/ karaoke	6.3%	6.3%
Fine dining	53.1%	55.2%
Family restaurant	61.1%	57.9%
Fast food	38.6%	40.5%
Food truck	40.9%	44.3%
Café/ coffee house	48.1%	48.6%
Ethnic dining	26.4%	31.2%
Prepared own meal	56.5%	48.2%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	97.1%	96.7%
Mall/ department store	40.0%	40.4%
Designer boutique	17.0%	18.9%
Hotel/ resort store	32.7%	37.7%
Swap meet/ flea market	14.8%	15.1%
Discount/ outlet store	13.0%	14.6%
Supermarket	71.0%	63.7%
Farmer's market	35.2%	31.8%
Convenience store	51.7%	53.3%
Duty free store	2.8%	3.3%
Local shop/ artisan	62.8%	66.0%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	60.4%	71.5%
Historic military site	16.8%	27.4%
Historic Hawaiian site	28.4%	34.3%
Other historical site	11.8%	13.1%
Art museum	2.1%	2.5%
Art galleries/ exhibitions	9.1%	9.1%
Luau/ Polynesian show/ hula show	19.8%	31.7%
Lesson ex. ukulele, hula, canoe, lei making	3.1%	4.4%
Play/ concert/ theatre	1.1%	1.4%
Art/ craft fair	7.9%	7.6%
Festival event	2.7%	2.2%

ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	91.8%	91.9%
Airport shuttle	14.4%	15.6%
Trolley	1.6%	2.1%
Public bus	4.1%	5.4%
Tour bus/ tour van	5.4%	11.2%
Taxi/ limo	10.0%	13.1%
Rental car	77.8%	75.3%
Ride share	16.7%	19.4%
Bicycle rental	3.0%	3.7%

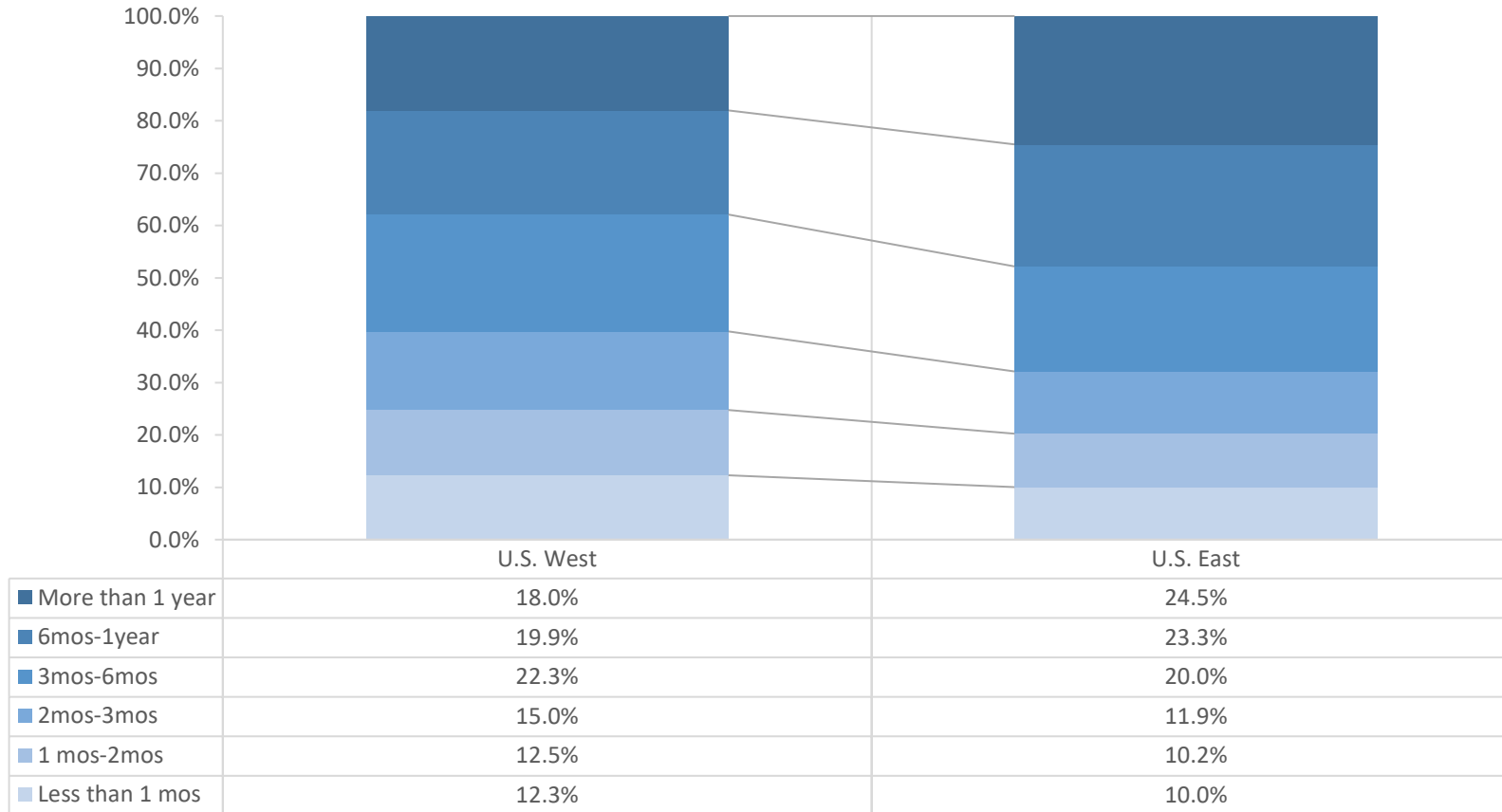
ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	31.7%	28.2%
Visit friends/ family	30.7%	27.3%
Volunteer non profit	1.5%	1.5%

Section – Travel Planning

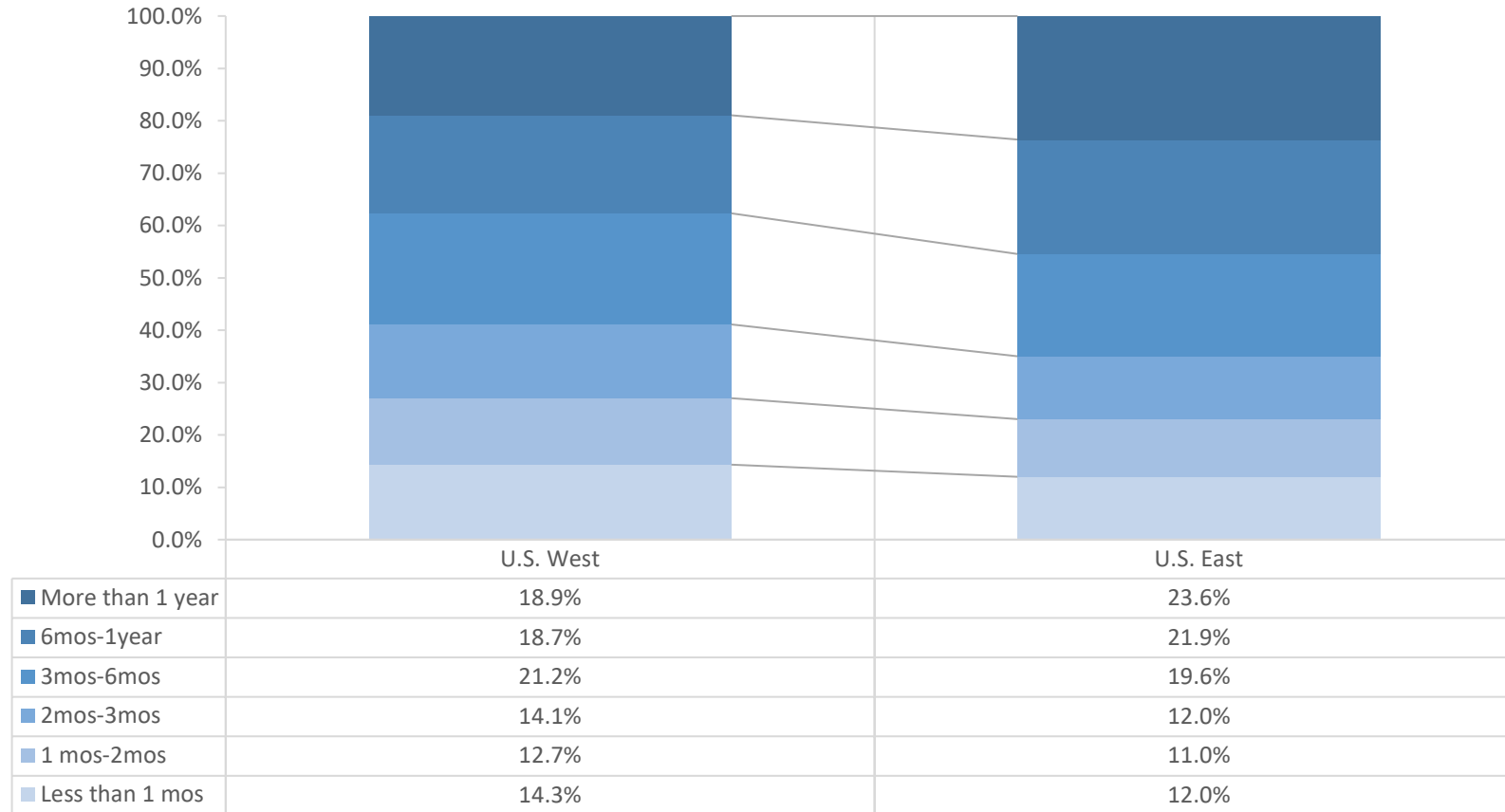
TRAVEL PLANNING

Decision to take vacation/ pleasure trip



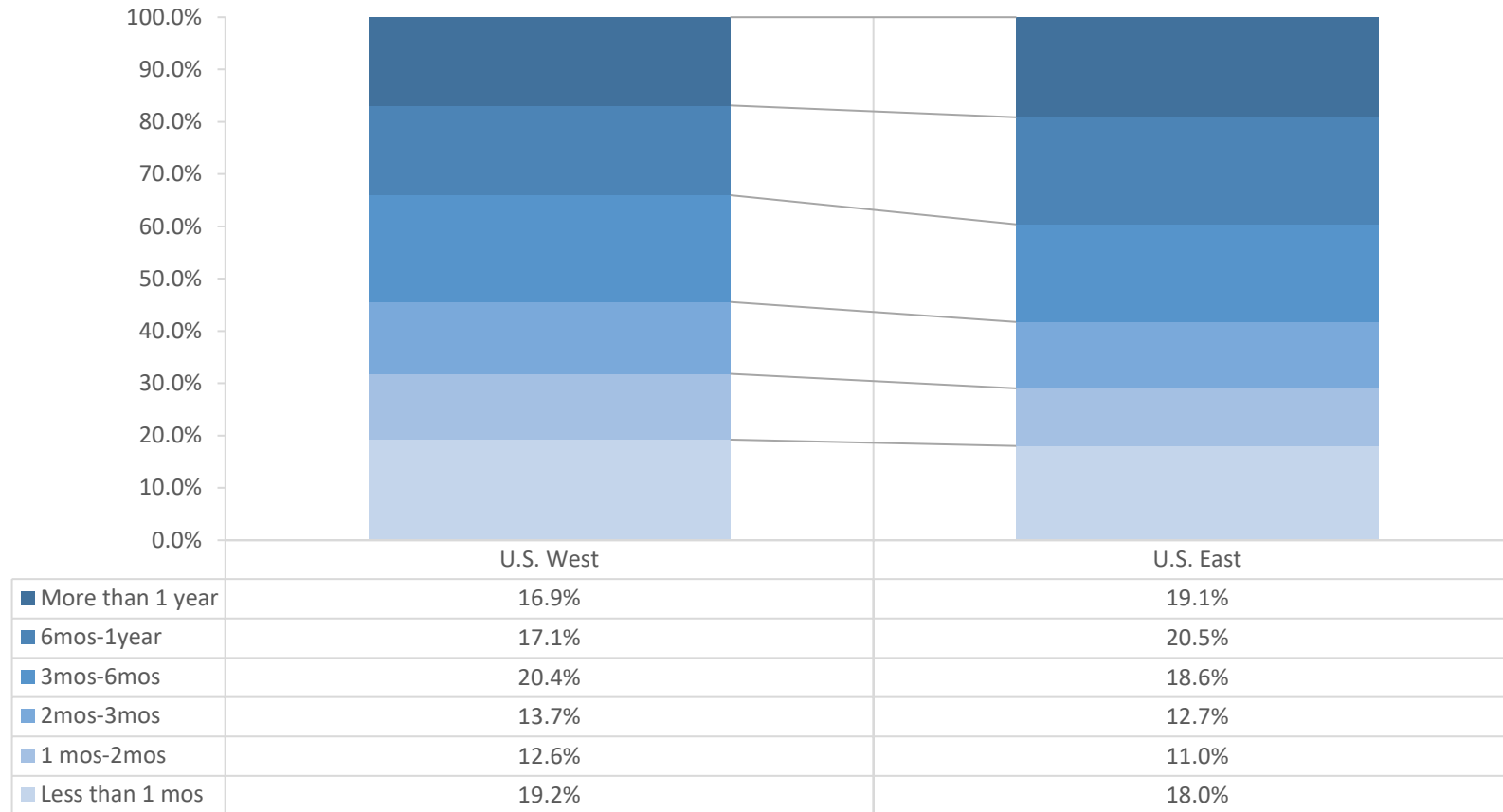
TRAVEL PLANNING

Decision to visit Hawai'i



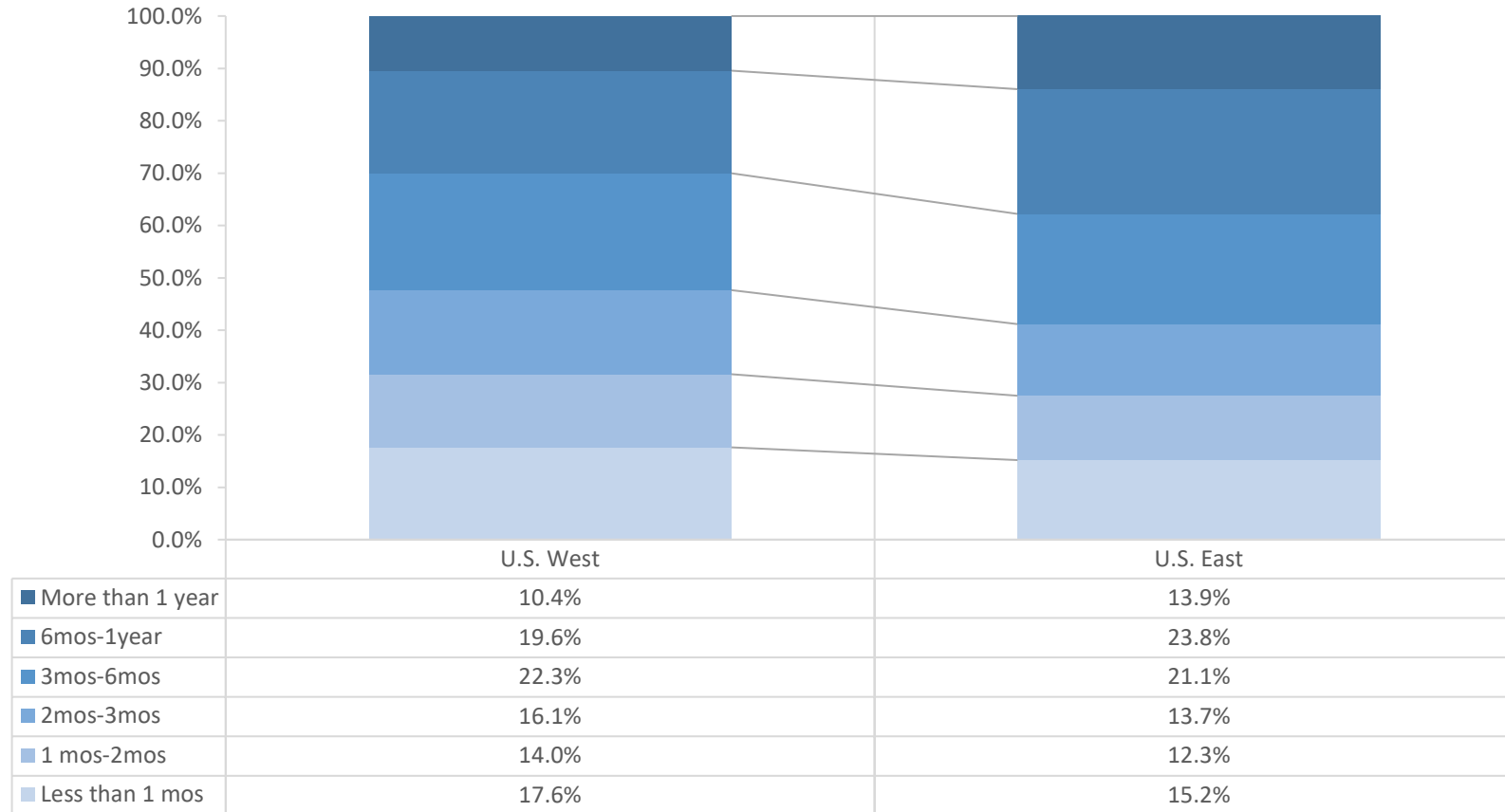
TRAVEL PLANNING

Decision on which islands to visit



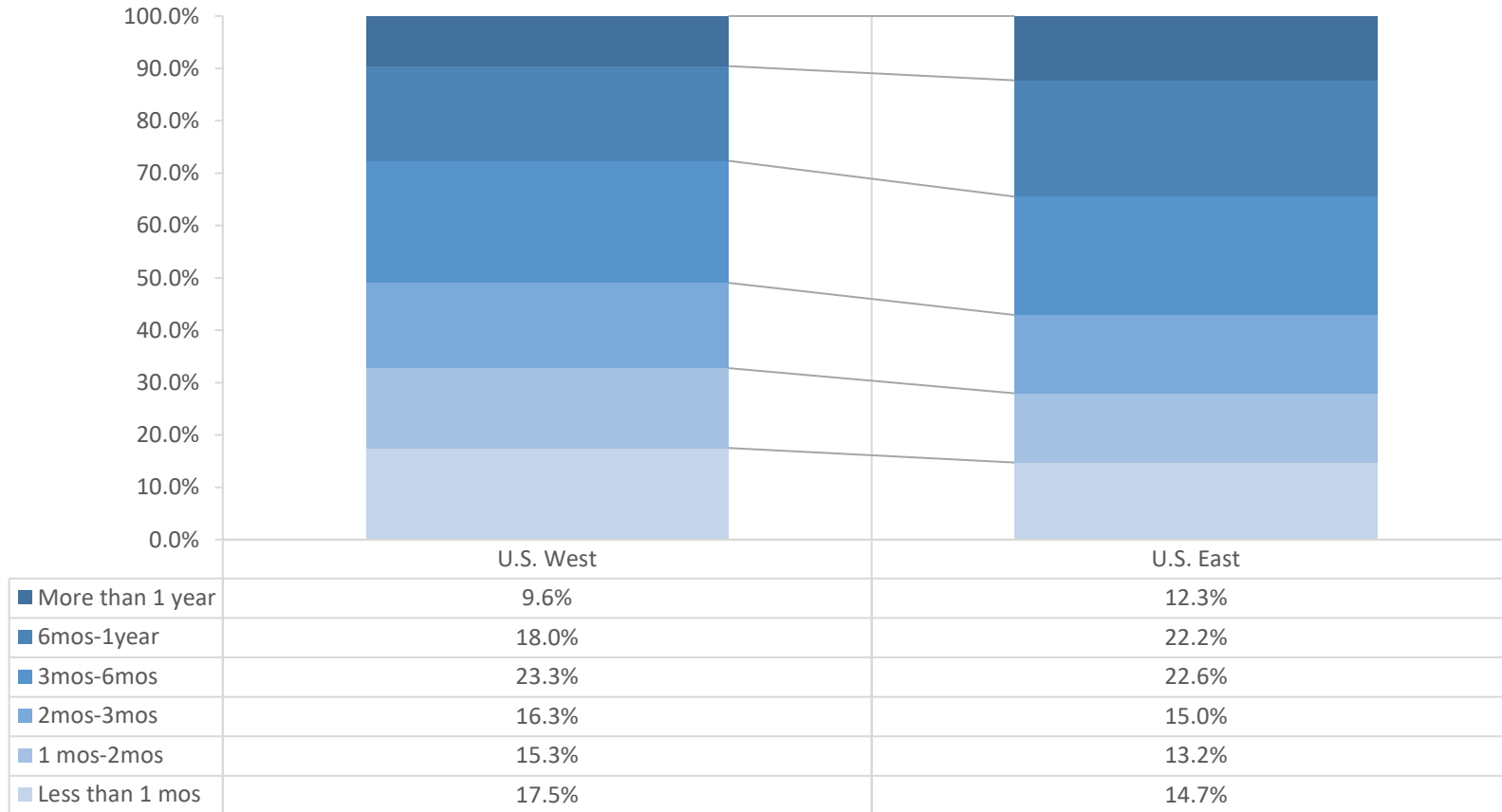
TRAVEL PLANNING

Determining the dates of your trip



TRAVEL PLANNING

Begin booking your trip



TRAVEL PLANNING SEGMENTATION

- **Age:** Older visitors from both U.S. West and U.S. East planned their trips to the state further out from their arrival date compared to younger visitors.
- **Islands visited:** Those who visited multiple islands during their stay tended to plan ahead over longer periods of time compared to those whose trip consisted of visiting a single island. This was true in both U.S. visitor markets.
- **Trips to Hawai'i:** Repeat visitors from U.S. West planned their trips to the state well before their arrival date compared to first-time visitors whose trip planning began much closer to their arrival.
- **Household income:** Amongst visitors from U.S. East, less affluent segments had a shorter planning window and appear more impulsive, while more affluent travelers planned their trip more in advance.
- **Travel party size:** The travel planning window is statistically longer as the travel party size increased in both U.S. visitor markets.

TRAVEL PLANNING

Sources of Information

	U.S. West	U.S. East
Personal experience		
Recommendations from friends/ family	37.3%	40.3%
Travel information website	29.6%	36.2%
HI destination website	20.9%	28.1%
Online travel booking site	20.2%	20.7%
Information direct from airline/ commercial carrier	19.5%	15.8%
Smartphone/ tablet app	15.8%	17.2%
Information direct from hotel/ resorts	15.4%	16.5%
Travel blogs	12.0%	17.6%
Social media	12.0%	15.9%
Travel agents/ companies specializing in packaged tours	7.8%	12.3%
Guidebooks	7.7%	11.5%
None	7.0%	6.7%
Magazine/ newspaper article	1.8%	3.2%
Television	0.8%	1.1%
Information direct from meeting planner/ convention sponsor		

TRAVEL PLANNING

Sources of Information

- ***Trips to Hawai'i:*** In general, more first-time visitors to the state from both U.S. markets relied on outside sources of information for trip planning compared to repeat visitors.
- ***Age:*** Younger respondents from both U.S. visitor markets were more likely to rely on digital sources for travel planning information. Conversely, older visitors showed a greater reliance on personal experience and information directly from the hotel.
- ***Gender:*** Female visitors from both U.S. West and U.S. East were more likely to rely on the Hawai'i travel destination website than male visitors.
- ***Household income:*** Visitors from U.S. West and U.S. East who were more affluent were more likely to rely on travel information websites, information directly from the airline, and information directly from the hotel. Conversely, less affluent visitors from U.S. West were the most likely to use apps for travel planning.
- ***College graduate:*** Those without a college degree from both U.S. visitor markets were less likely to rely on outside sources of information when travel planning. Visitors with a college degree appeared more active in seeking out information.

Section – Trip Purpose

PRIMARY TRIP PURPOSE

Top Responses

	U.S. West	U.S. East
Pleasure/Vacation		
Visiting Friends or Relatives	10.8%	14.3%
Honeymoon	2.1%	5.2%
Other Business	2.5%	2.6%
Anniversary/ birthday	2.2%	2.7%
Attend/ participate in a wedding/ vow renewal	0.9%	0.9%
Convention/Conference	0.5%	0.6%
Incentive Trip	0.3%	0.8%
Government or Military Business	0.4%	0.7%
To Get Married	0.3%	0.8%
Attend funeral/memorial service	0.4%	0.4%
To Attend School	0.4%	0.3%
Real estate purchase or viewing	0.4%	0.1%
Sports Event		

PRIMARY + SECONDARY TRIP PURPOSE

Multiple Responses

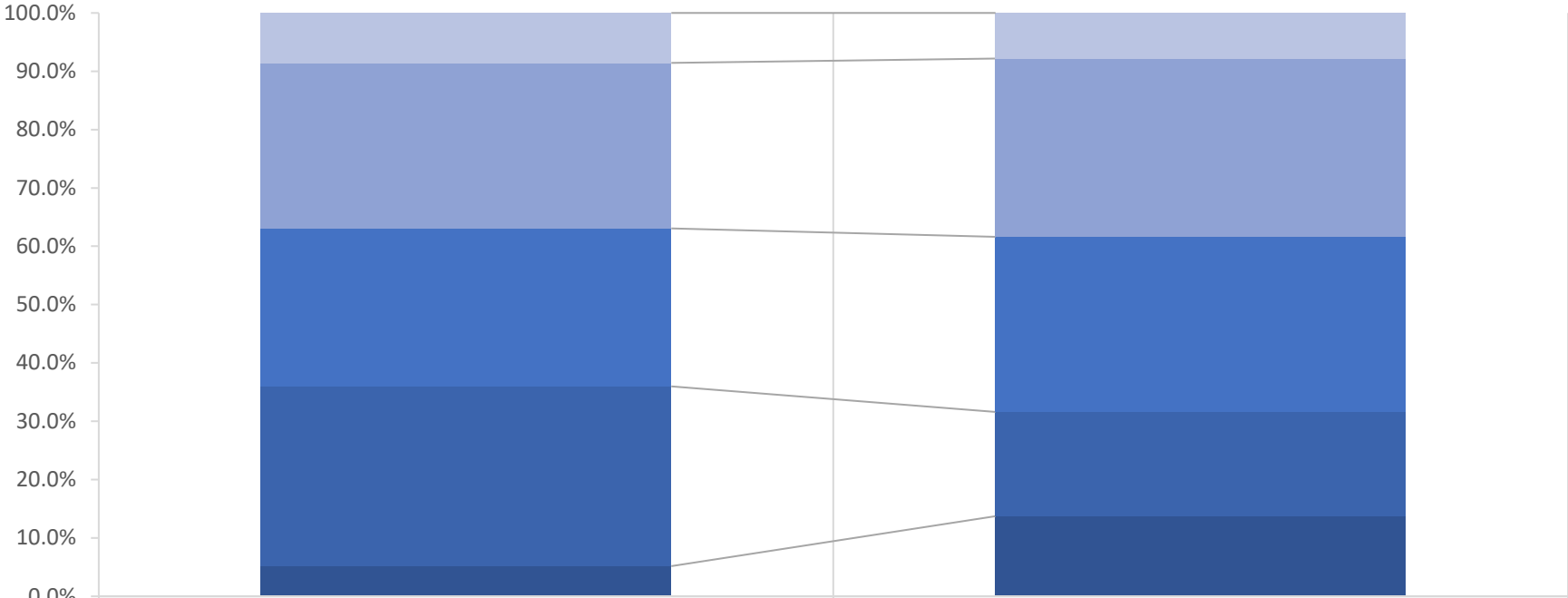
	U.S. West	U.S. East
Pleasure/Vacation	90.7%	87.9%
Visiting Friends or Relatives	20.8%	22.0%
Anniversary/ birthday	4.7%	5.6%
Other Business	4.4%	4.1%
Honeymoon	3.0%	6.3%
Incentive Trip	1.2%	1.8%
Attend/ participate in a wedding/ vow renewal	1.3%	1.4%
Other (please specify)	0.7%	0.9%
Convention/Conference	0.6%	0.9%
To Get Married	0.5%	1.0%
Government or Military Business	0.5%	1.0%
Real estate purchase or viewing	0.8%	0.2%
Attend funeral/memorial service	0.5%	0.5%
Attend graduation	0.5%	0.5%
To Attend School	0.5%	0.5%

70 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?

PURPOSE OF TRIP - SEGMENTATION

- **Age:** Traveling to the state for their honeymoon was the third most popular reason to visit Hawai'i amongst visitors under the age of 35.
- **Household income:** Visiting friends and family was a reason for travel cited more often by less affluent travelers from both U.S. West and U.S. East.
- **Gender:** Visiting friends and family was more likely to be cited as a reason for travel by female respondents in both U.S. visitor markets. Male visitors were statistically more likely to be here on business.
- **Trips to Hawai'i:** First-time visitors to the state were more likely to list special occasions like anniversary/ birthdays and honeymoon as reasons for travel from both U.S. visitor markets. Visiting friends and family was a reason cited more often by repeat visitors from both U.S. markets.
- **College graduate:** Those without a college degree from both U.S. visitor markets were more likely to list visiting friends and family as a reason for their trip.

VACATION TRIP DESCRIPTION



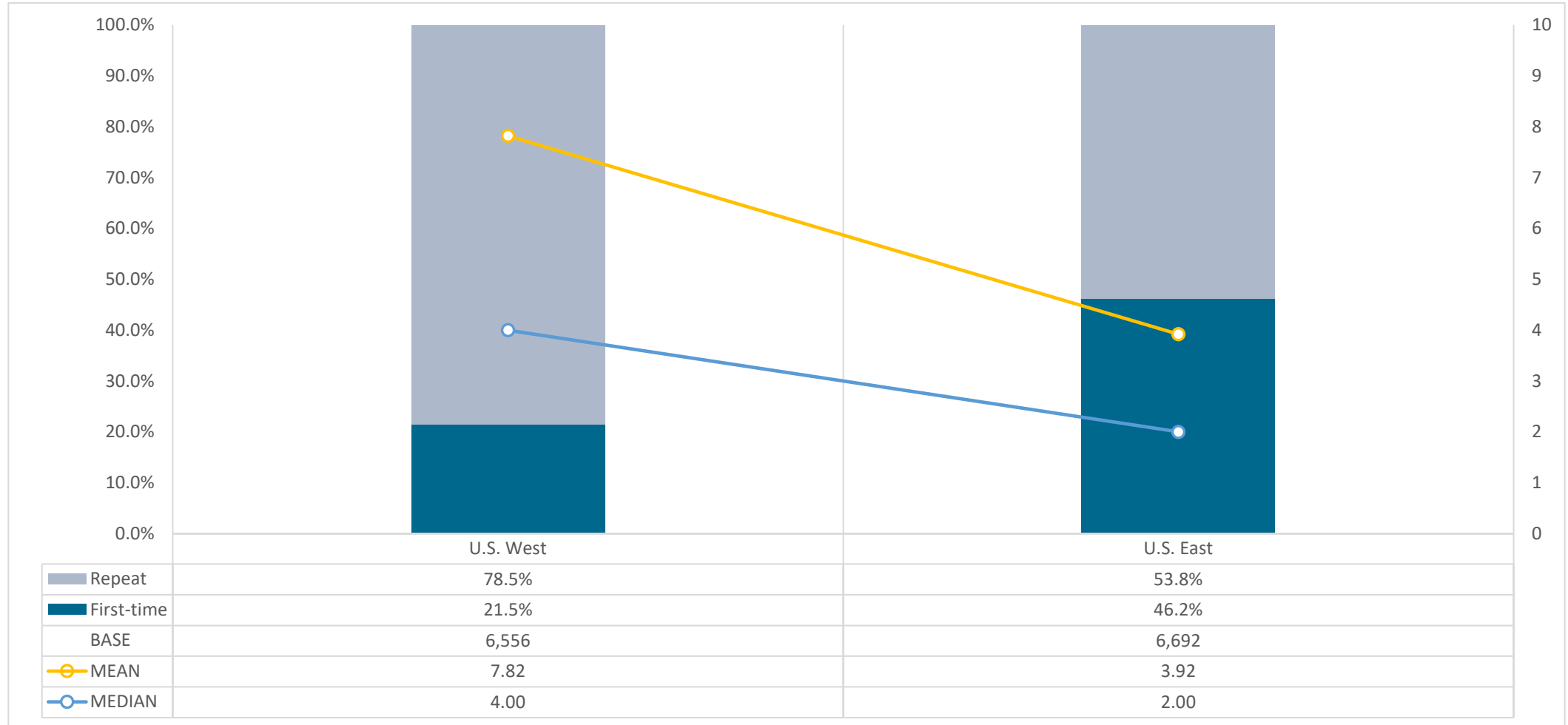
	U.S. West	U.S. East
Other	8.6%	7.8%
More special than most	28.4%	30.6%
Special occasion	27.1%	30.0%
Annual/ Semi-annual trip	30.8%	17.9%
Once in a lifetime	5.2%	13.7%

VACATION TRIP DESCRIPTION - SEGMENTATION

- **Age:** Younger visitors from both U.S. markets were more likely to view their trip as a once in a lifetime experiences or a special occasion. Conversely, older visitors were more likely to view their trip as a regular occurrence.
- **Trips to Hawai'i:** First-time visitors from both U.S. markets were more likely to view their trip as a once in a lifetime or special occasion.
- **Gender:** Male respondents from both U.S. West and U.S. East were more likely to classify their trip as an annual or semi-annual trip compared to female respondents.
- **Household income:** Less affluent visitors from both U.S. markets were more likely to view their trip as a special occasion or once in a lifetime experience. More affluent visitors saw their trip as a regular or semi-annual travel experience.
- **College graduate:** Those with a college degree from both U.S. visitor markets were more likely to view the trip as something more special than an average trip, compared to those without a degree. Those without a college degree were more likely to view their trip as a once in a lifetime experience.

Section – Trips to Hawai'i

1st TIME VS REPEAT VISITOR



1st TIME VS REPEAT VISITOR

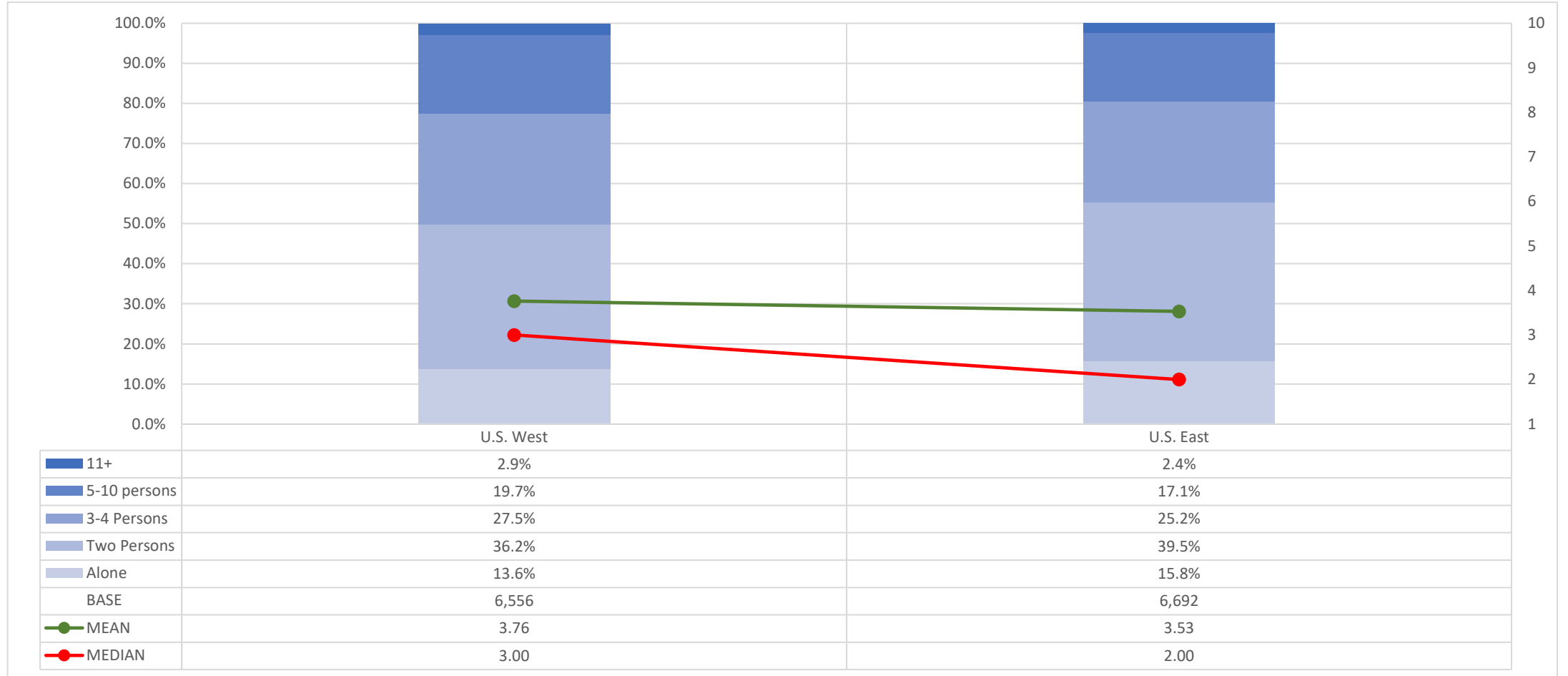
- **Travel party size:** Visitors from both U.S. West and U.S. East in smaller travel parties, particularly those who came alone, have been to Hawai'i more on average. As travel party size got larger the number of trips to Hawai'i declined.
- **Household income:** The number of times visitors came to the state increased as they become more affluent. This was the case for both U.S. travel markets.
- **Gender:** Male respondents from U.S. West and U.S. East have traveled to Hawai'i more often than female respondents.
- **Education:** Respondents from U.S. West and U.S. East without a college degree were more likely to be first-time visitors to the state, while repeat visitors included a higher proportion of college graduates.
- **Age:** In both U.S. visitor markets, the average number of trips to Hawai'i increased with age.

Section – Travel Party

TRAVEL PARTY MEMBERS

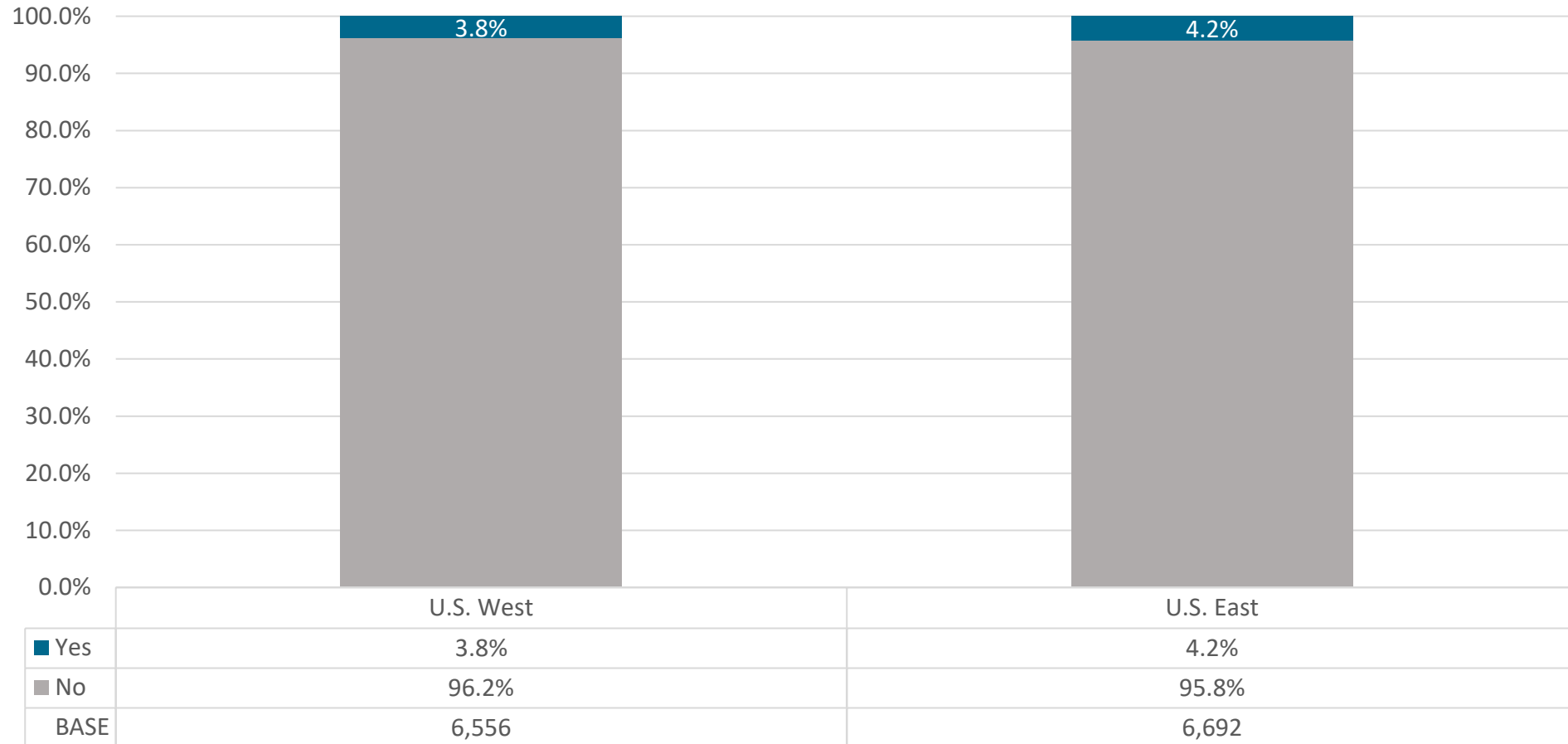
	U.S. West	U.S. East
My spouse	58.4%	56.0%
Other adult members of my family	29.0%	27.3%
My child(ren)/ grandchild(ren) under 18	27.9%	20.9%
My friends/ associates	18.5%	17.4%
Myself only (traveled alone/ no one else)	8.5%	10.2%
My girlfriend/ boyfriend	8.4%	8.1%
Same gender partner	1.1%	1.0%

TRAVEL PARTY MEMBERS



Section – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

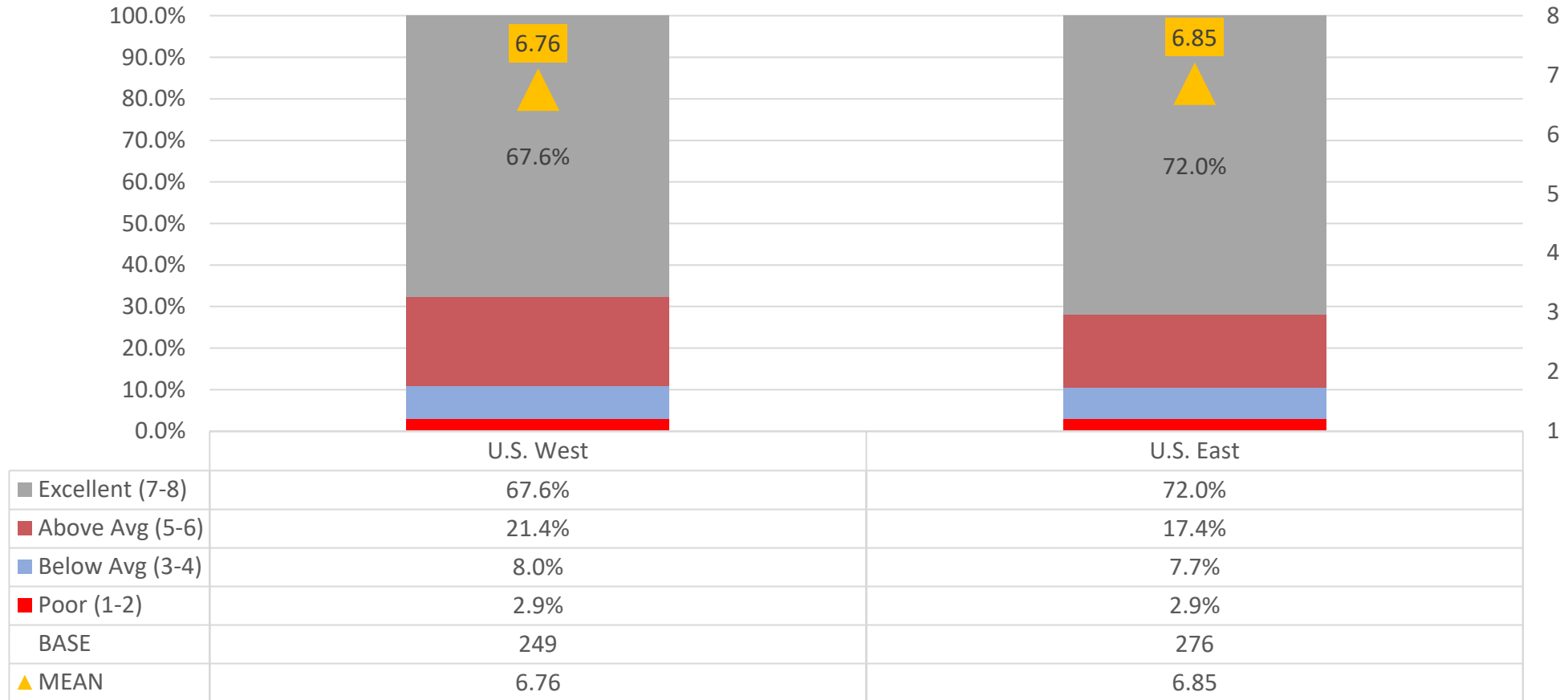


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane)	69.2%	78.0%
Personal assistance	25.5%	18.1%
Other	6.5%	4.5%
NA No one needed assistance	5.9%	5.0%
Orientation and Mobility Assistance	3.4%	2.4%
Lift equipped van	2.0%	0.7%
Ambulance/ Hospital/ Medical visit	2.0%	0.3%
ASL Interpreter/ texting/ captioning	0.8%	1.1%
Print material in alternate format	0.5%	0.7%
Respiratory equipment	0.4%	0.4%
Service/ assistance animal	0.4%	0.0%
No help was offered	0.0%	0.4%

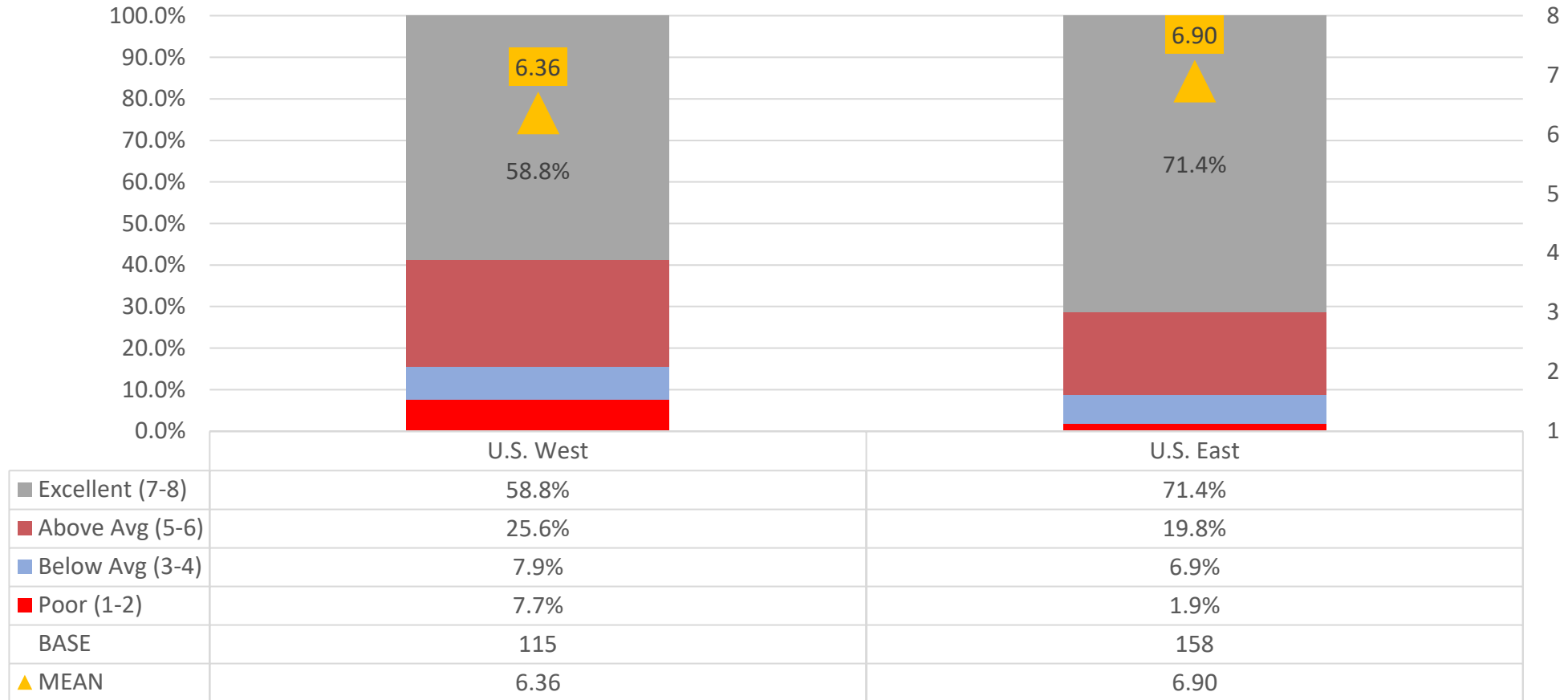
OVERALL ACCESSIBILITY - AIRPORTS

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



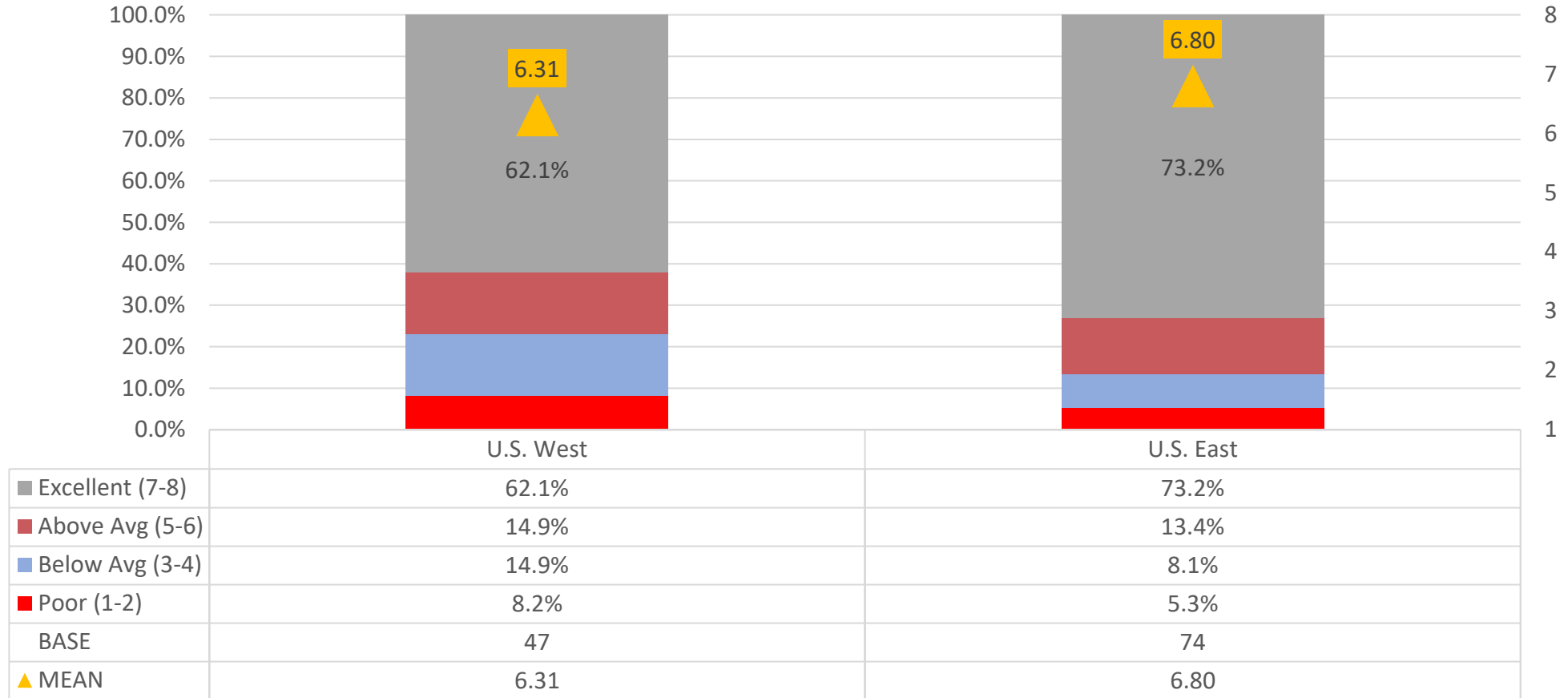
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



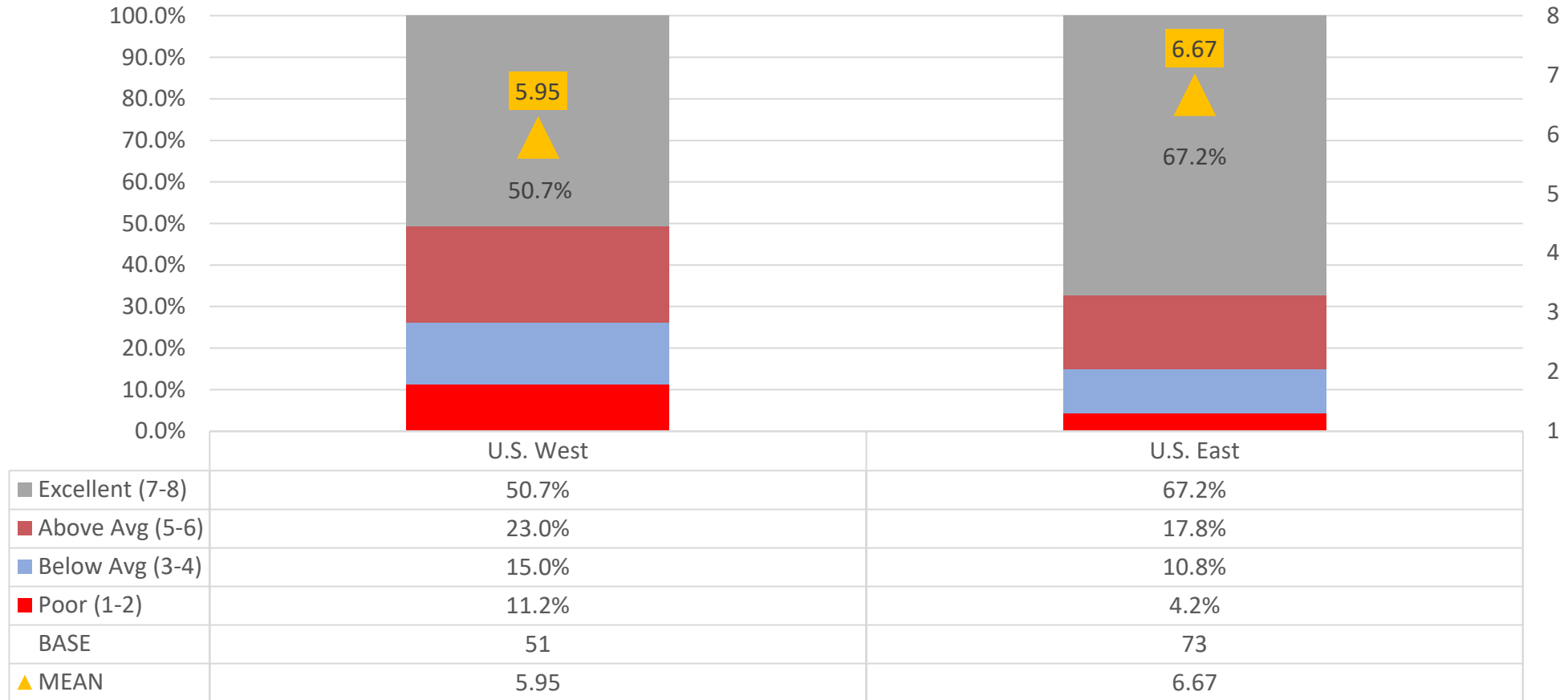
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



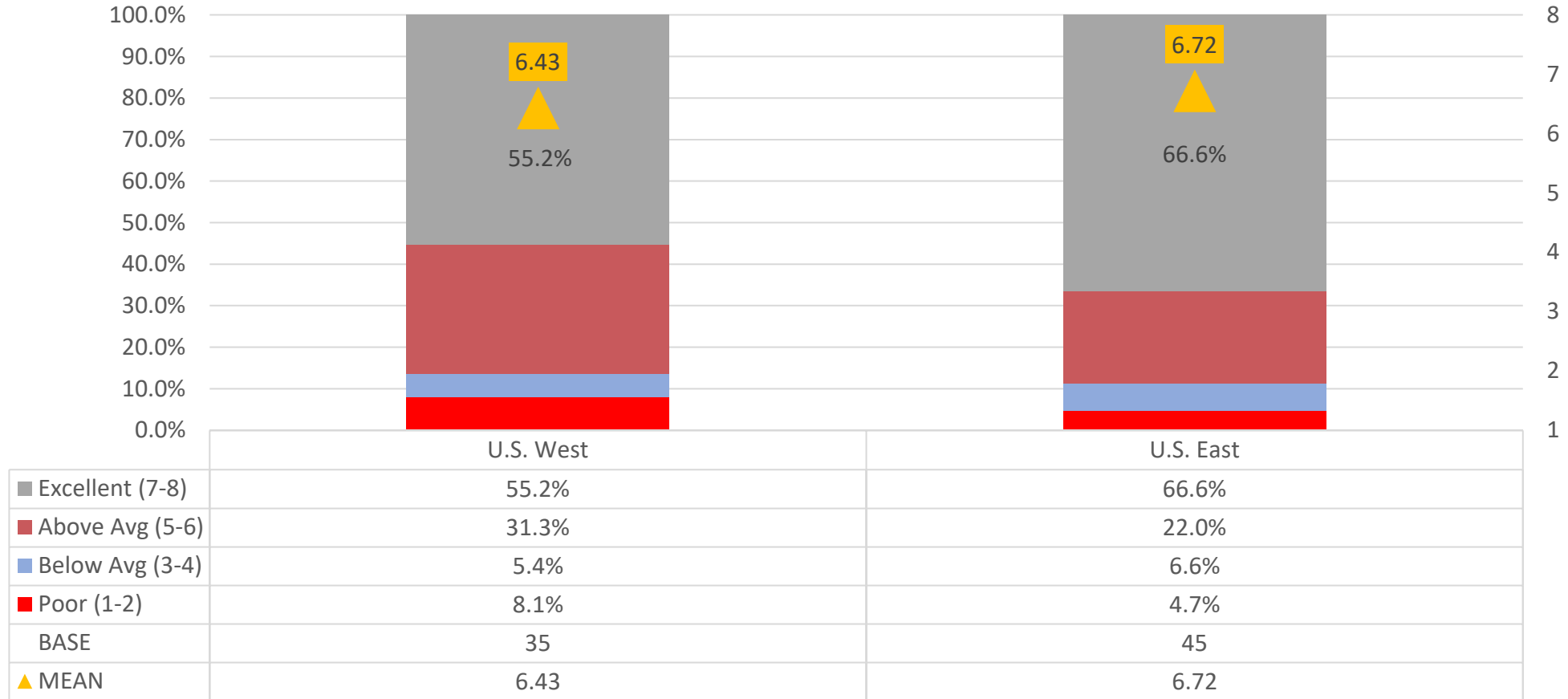
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



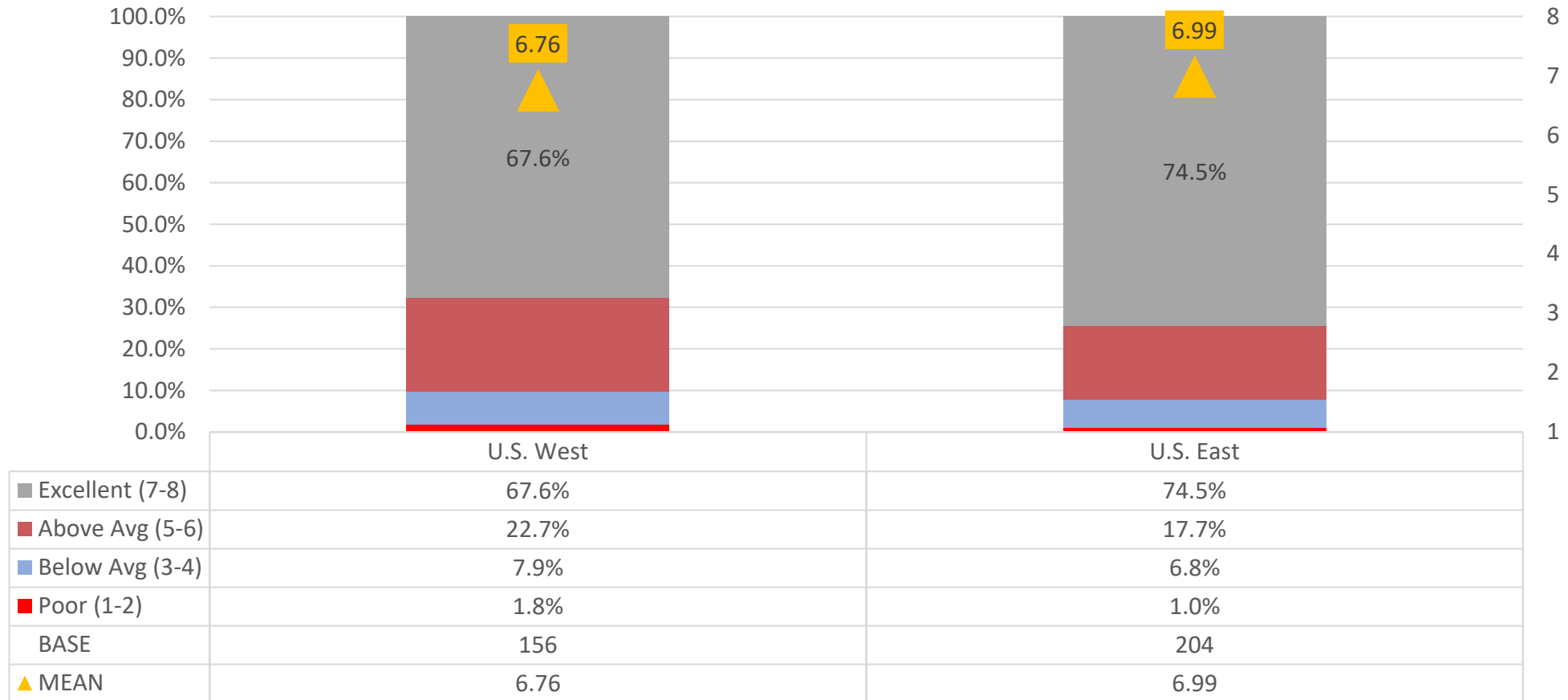
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



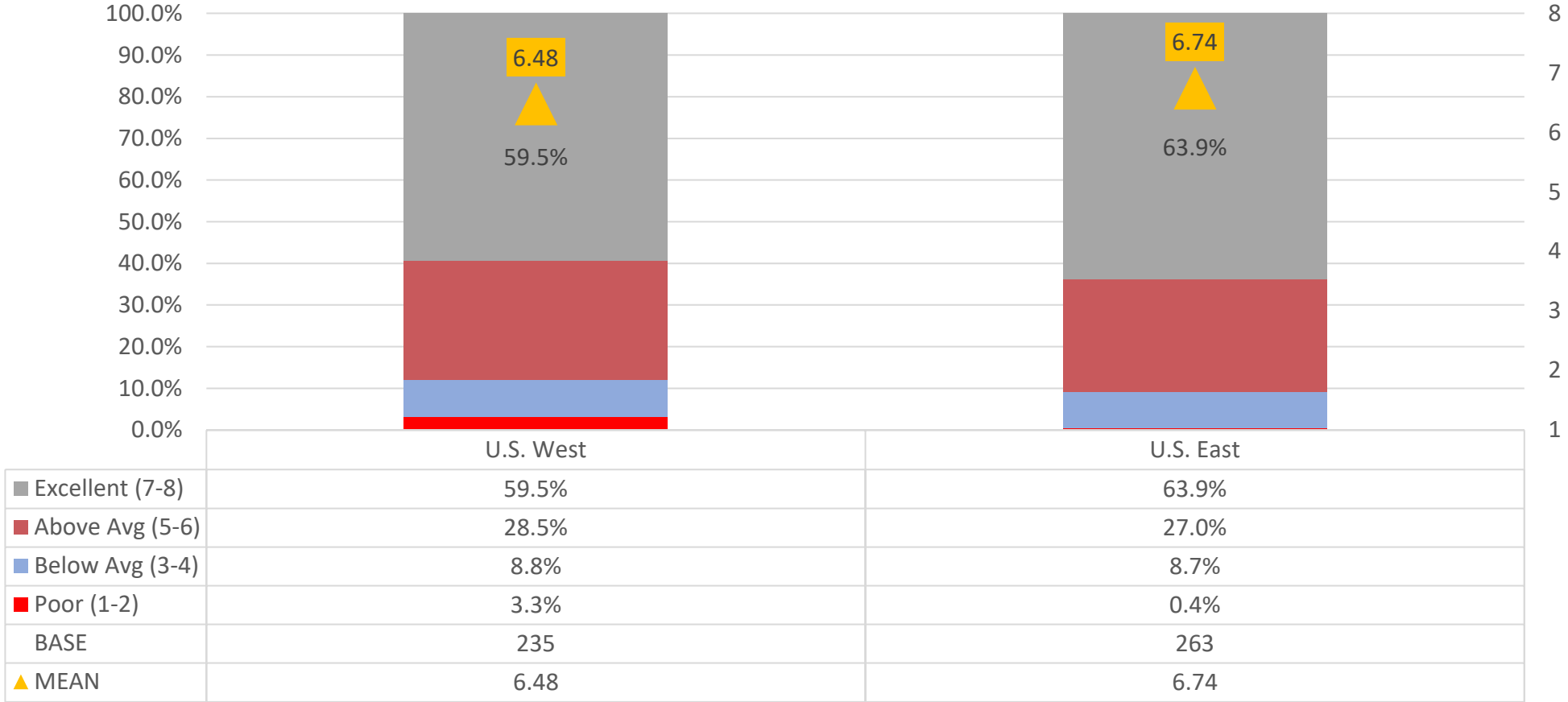
OVERALL ACCESSIBILITY - HOTELS

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



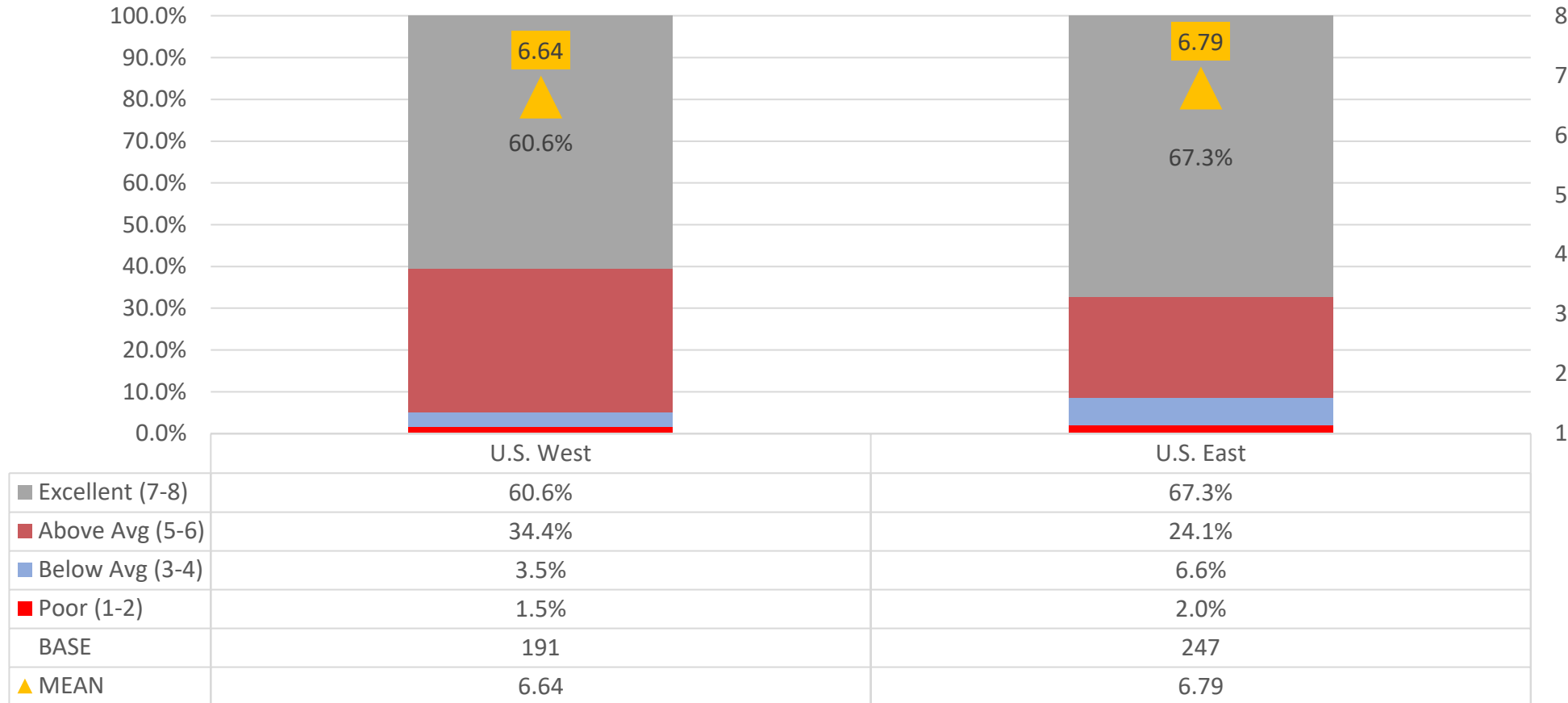
OVERALL ACCESSIBILITY - RESTAURANTS

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



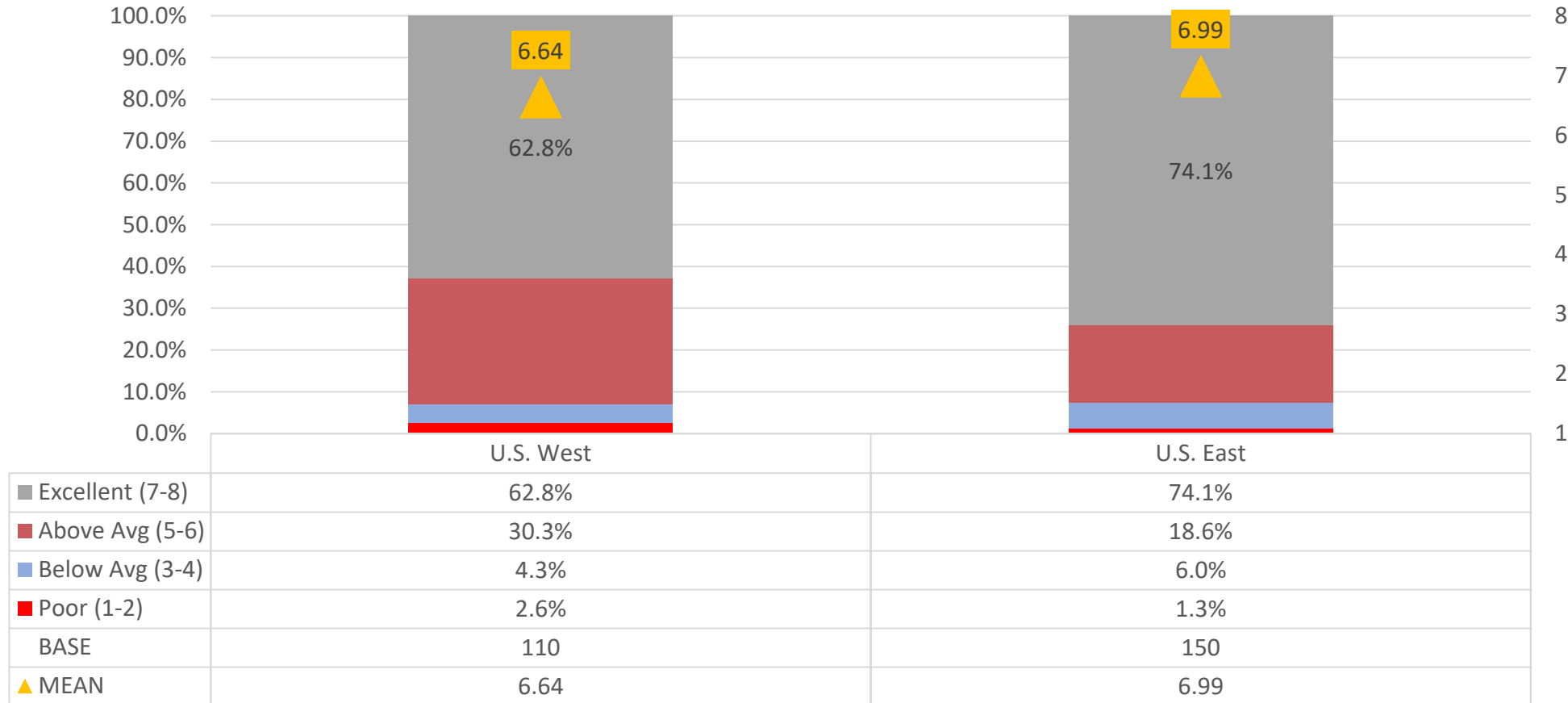
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



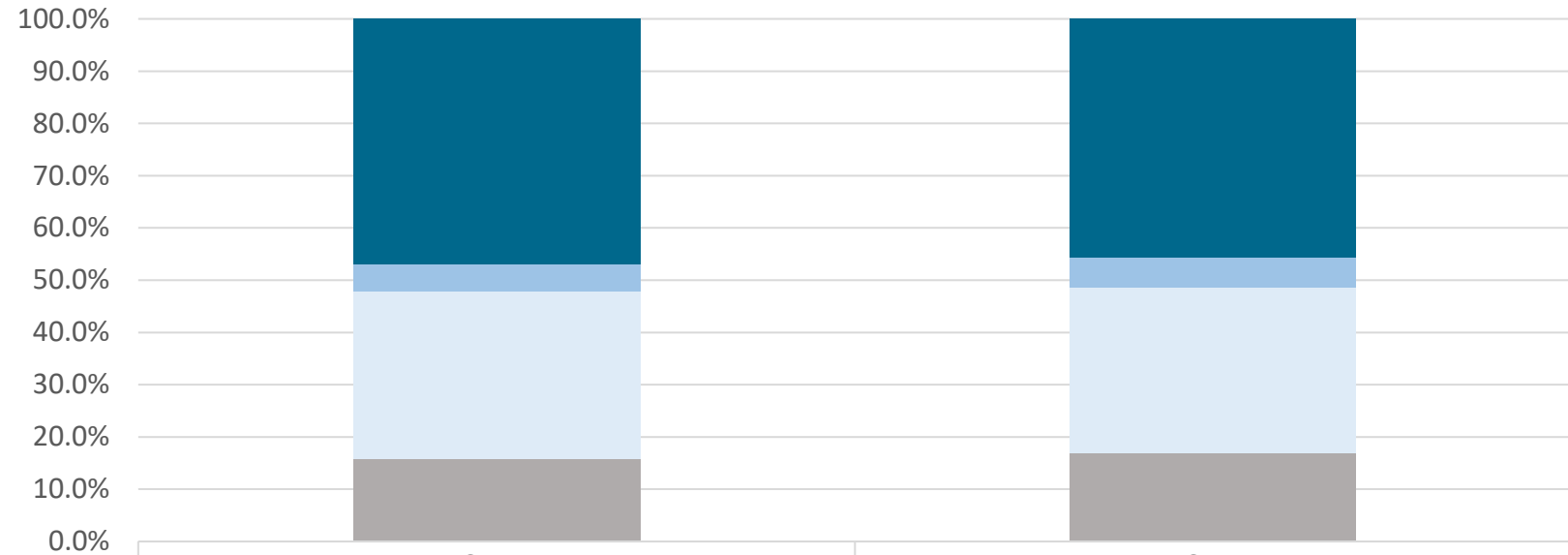
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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



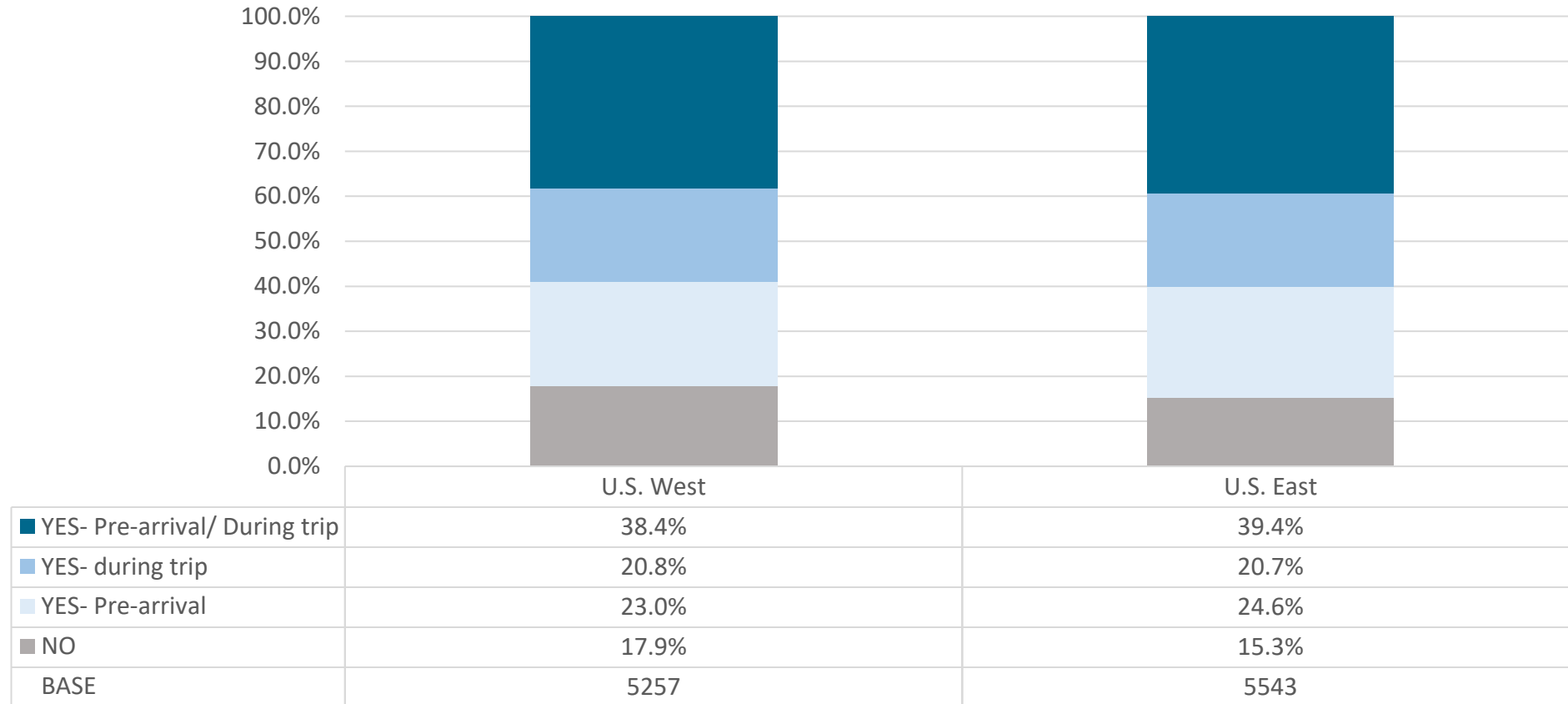
Section – Alternative Messaging

SAFE AND RESPONSIBLE TRAVEL

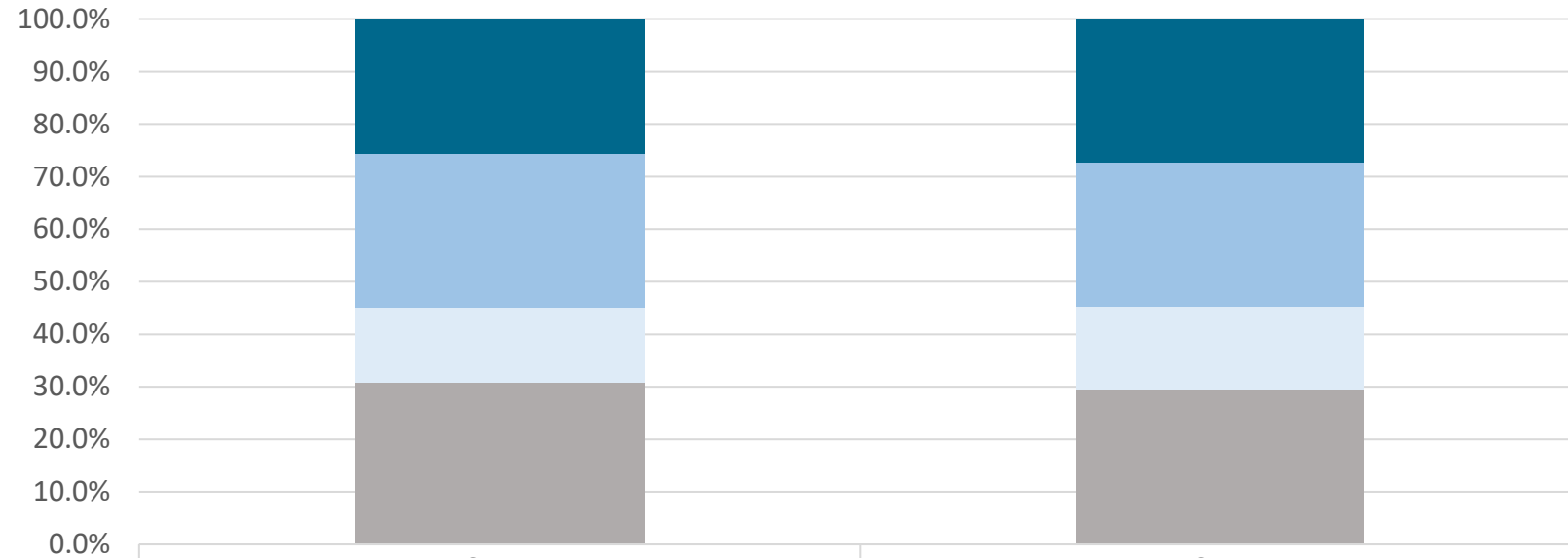


	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	47.1%	45.6%
■ YES- during trip	5.1%	5.8%
■ YES- Pre-arrival	32.2%	31.6%
■ NO	15.7%	17.0%
BASE	5257	5543

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



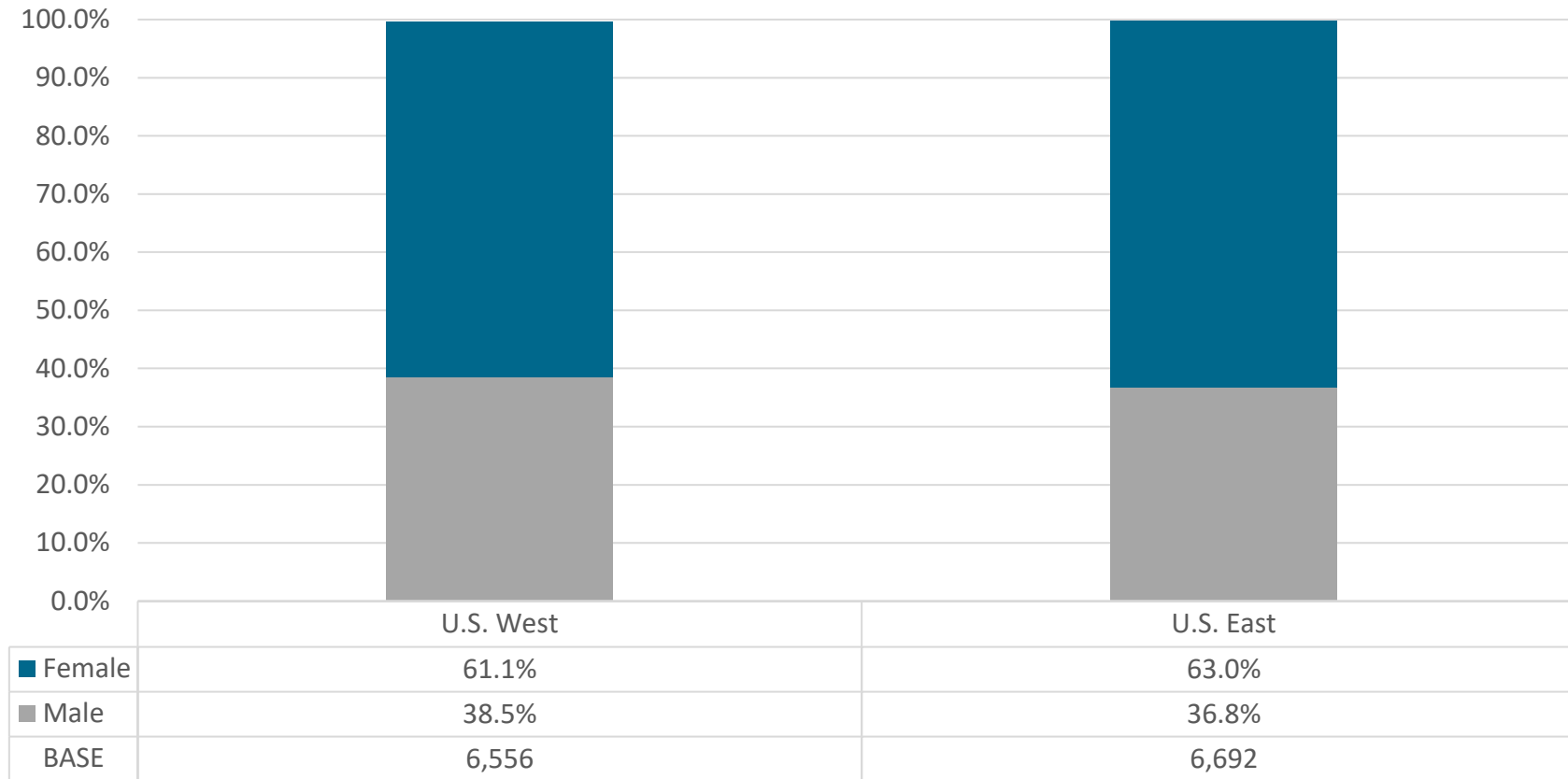
OCEAN AND HIKING SAFETY



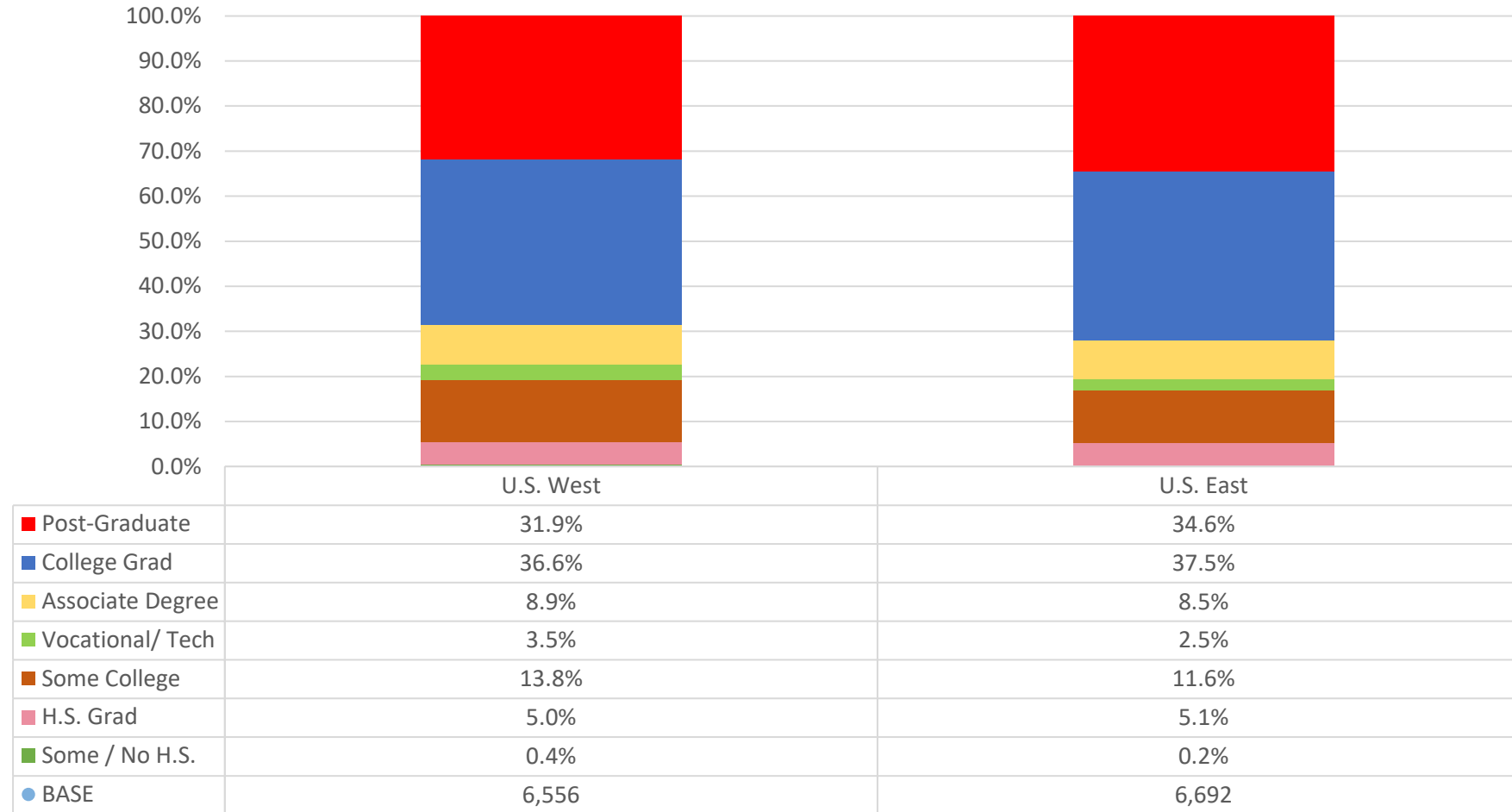
	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	25.6%	27.4%
■ YES- during trip	29.3%	27.4%
■ YES- Pre-arrival	14.3%	15.7%
■ NO	30.8%	29.5%
BASE	5257	5543

Section – Visitor Profile

VISITOR PROFILE - GENDER



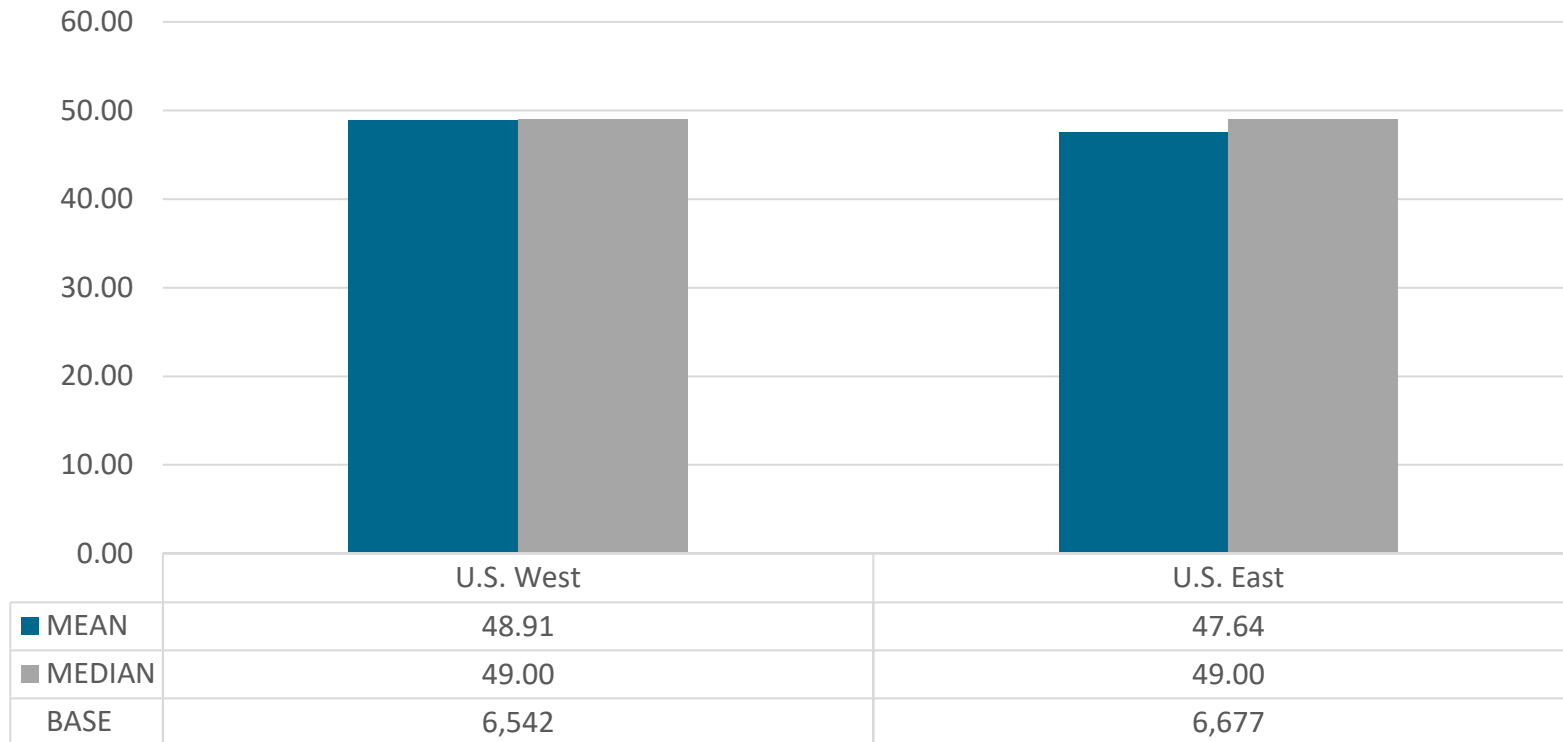
VISITOR PROFILE - EDUCATION



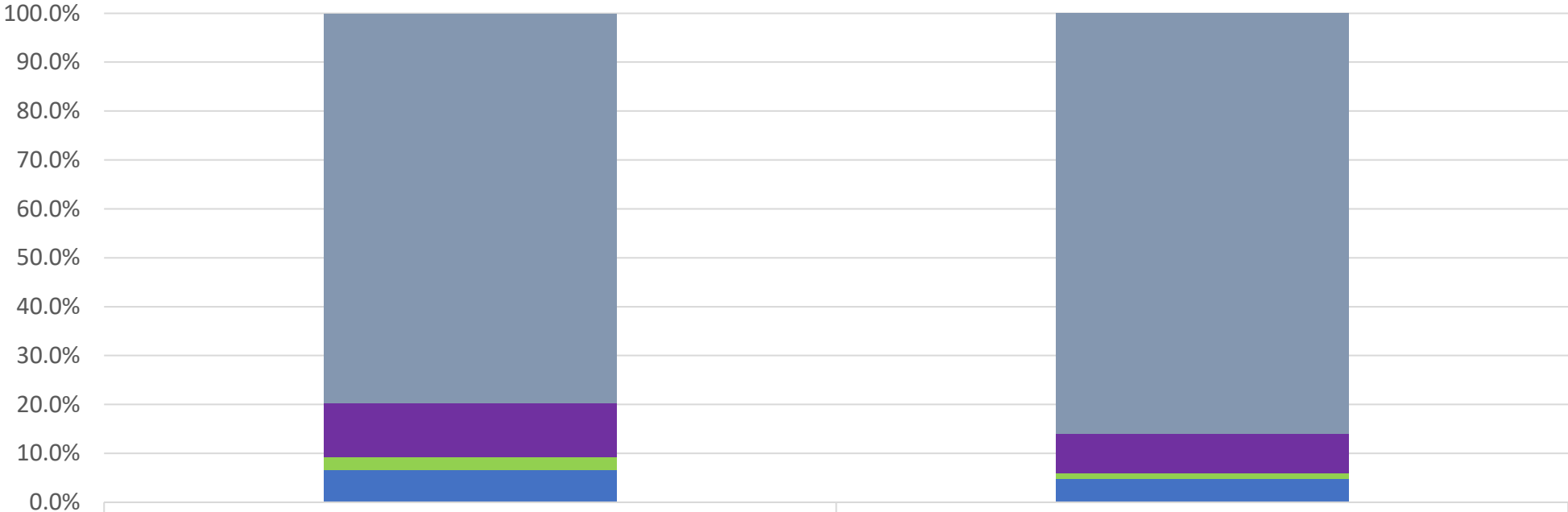
VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000		
\$40,000 to \$59,999	6.5%	7.2%
\$60,000 to \$79,999	8.8%	10.2%
\$80,000 to \$99,999	9.7%	9.4%
\$100,000 to \$124,999	12.3%	12.8%
\$125,000 to \$149,999	11.6%	11.1%
\$150,000 to \$174,999	10.1%	9.5%
\$175,000 to \$199,999	7.4%	6.4%
\$200,000 to \$249,999	8.6%	8.6%
\$250,000 +		

VISITOR PROFILE - AGE



VISITOR PROFILE - HAWAI'I PROPERTY OWNER



	U.S. West	U.S. East
■ Do not nor plan to purchase	79.7%	86.1%
■ Plan to in future	11.0%	8.0%
■ Other Property Type	2.7%	1.1%
■ Timeshare	6.6%	4.8%
BASE	6,556	6,692

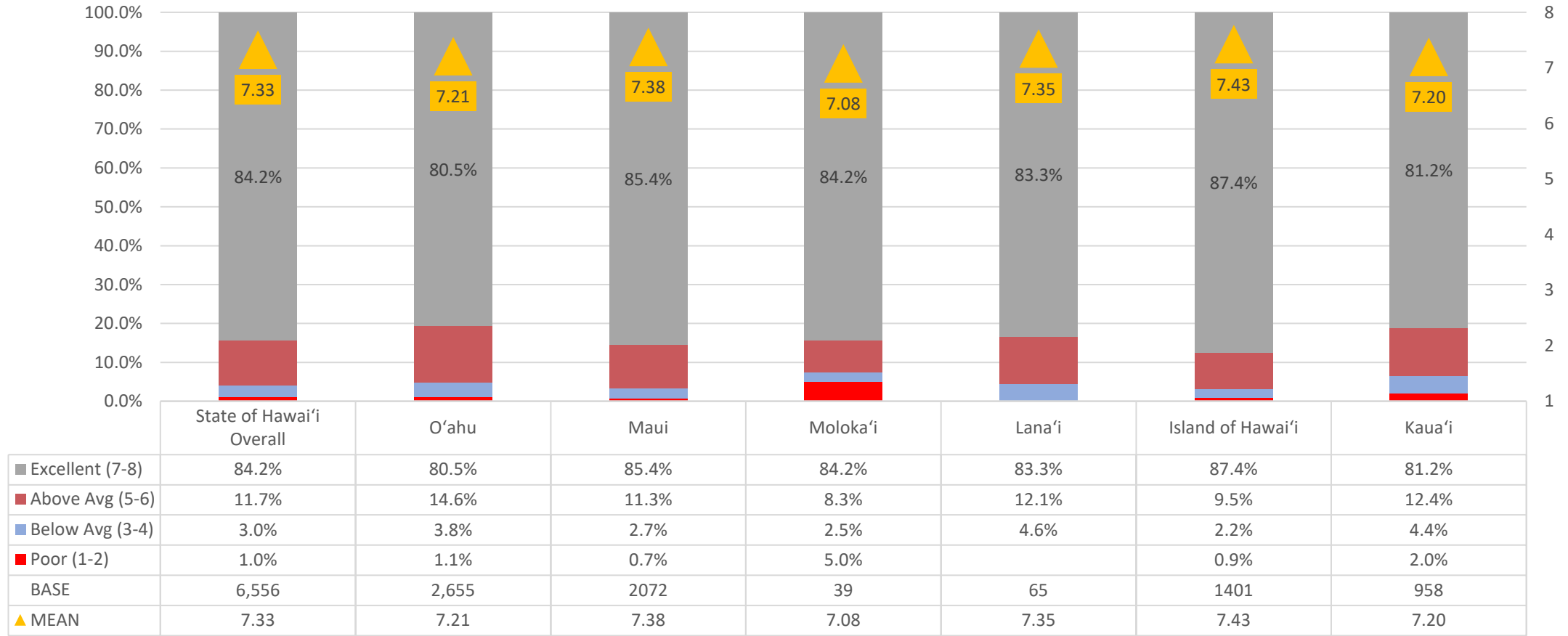
COMPETITIVE BRANDSET

	U.S. West	U.S. East
Other U.S. States		
California	64.4%	45.9%
Las Vegas	54.2%	37.6%
Florida	29.3%	60.3%
New York City	32.3%	47.6%
Mexico	38.1%	31.7%
Europe	35.5%	36.4%
Canada	25.0%	23.9%
Caribbean	17.8%	34.1%
Alaska	13.7%	9.1%
Central America	8.6%	10.1%
Japan	8.7%	6.1%
South America	7.3%	8.5%
Other Asia	8.3%	6.1%
Australia	6.3%	5.2%
China	6.3%	4.9%
Thailand	5.8%	4.3%
New Zealand	4.8%	3.5%
None of these	4.0%	3.8%
Korea	3.4%	2.7%
Vietnam	3.2%	1.8%
Bali	2.7%	1.8%
Tahiti	2.3%	1.3%
Fiji	1.6%	0.8%
Guam/ Saipan		

Section – U.S. West

OVERALL SATISFACTION - MOST RECENT TRIP - U.S. WEST

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



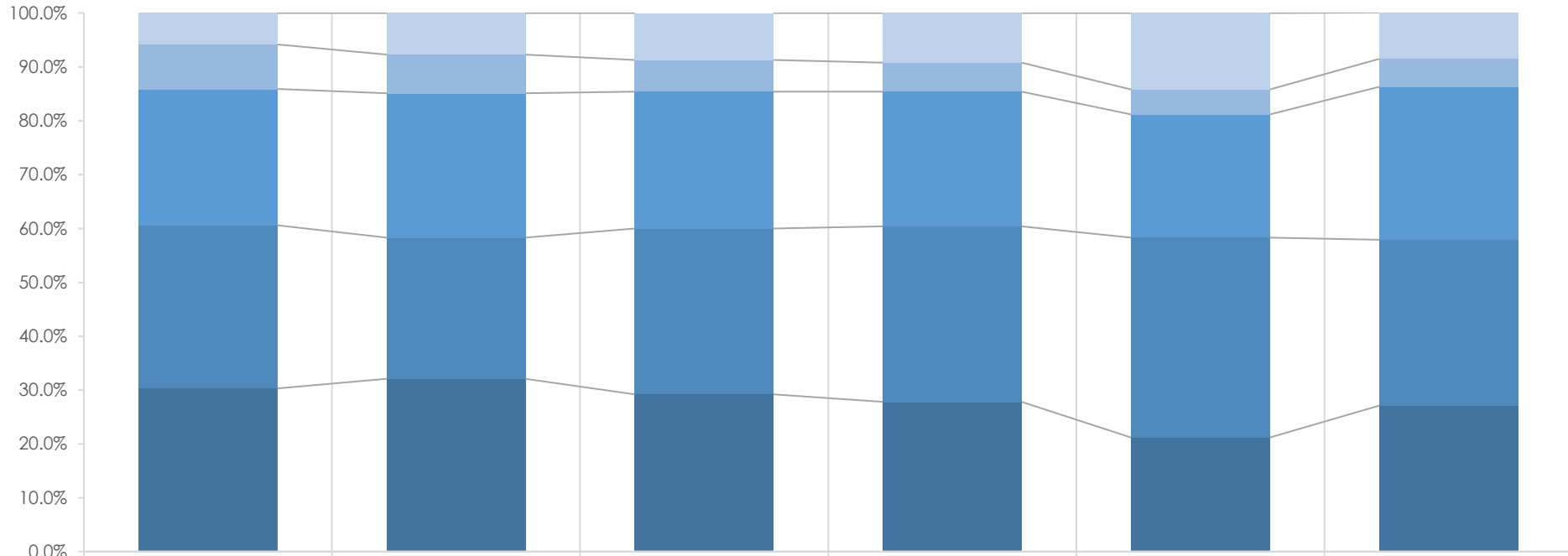
PRIMARY PURPOSE OF TRIP - U.S. WEST

	2018	2019	2020	2021
Vacation	59.5%	61.5%	64.6%	76.3%
Visit friends or relatives	8.2%	7.7%	19.8%	10.8%
Other business	3.9%	3.8%	4.3%	2.5%
Anniversary/ birthday	7.8%	8.4%	1.6%	2.2%
Honeymoon	2.0%	1.6%	1.4%	2.1%
Attend/ participate in a wedding/ vow renewal	3.2%	2.6%	0.4%	0.9%
Attend a convention, conference or seminar	2.6%	1.8%	0.5%	0.5%
Government/ Military	0.1%	0.1%	1.0%	0.4%
Have a vacation home/ timeshare	3.0%	2.8%	0.8%	0.2%
Family gathering/ reunion	2.5%	2.7%	0.1%	0.1%

PRIMARY + SECONDARY PURPOSE OF TRIP - U.S. WEST

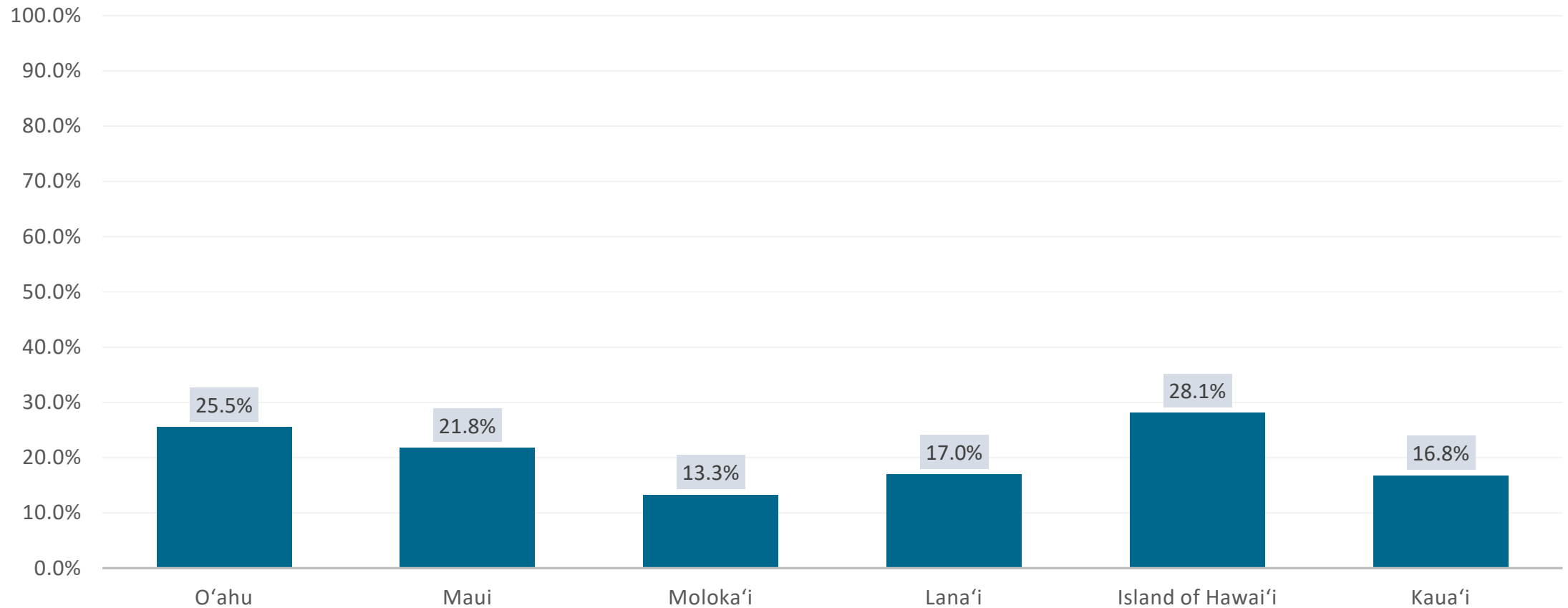
	2018	2019	2020	2021
Vacation	82.8%	84.1%	81.5%	90.7%
Visit friends/ relatives	16.6%	15.9%	28.8%	20.8%
Anniversary/ birthday	14.1%	15.8%	3.5%	4.7%
Business trip	5.5%	5.4%	7.1%	4.4%
Honeymoon	2.7%	2.3%	2.1%	3.0%
Attend wedding/ vow renewal	0.9%	3.1%	0.6%	1.3%
Incentive trip	1.6%	1.9%	1.0%	1.2%
Convention, conference, seminar	3.3%	2.3%	0.8%	0.6%
Government/ military	0.3%	0.2%	1.2%	0.5%
Vacation home/ timeshare	6.7%	6.3%	1.0%	0.5%
Family gathering/ reunion	7.1%	6.8%	0.1%	0.3%

VACATION DESCRIPTION - U.S. WEST

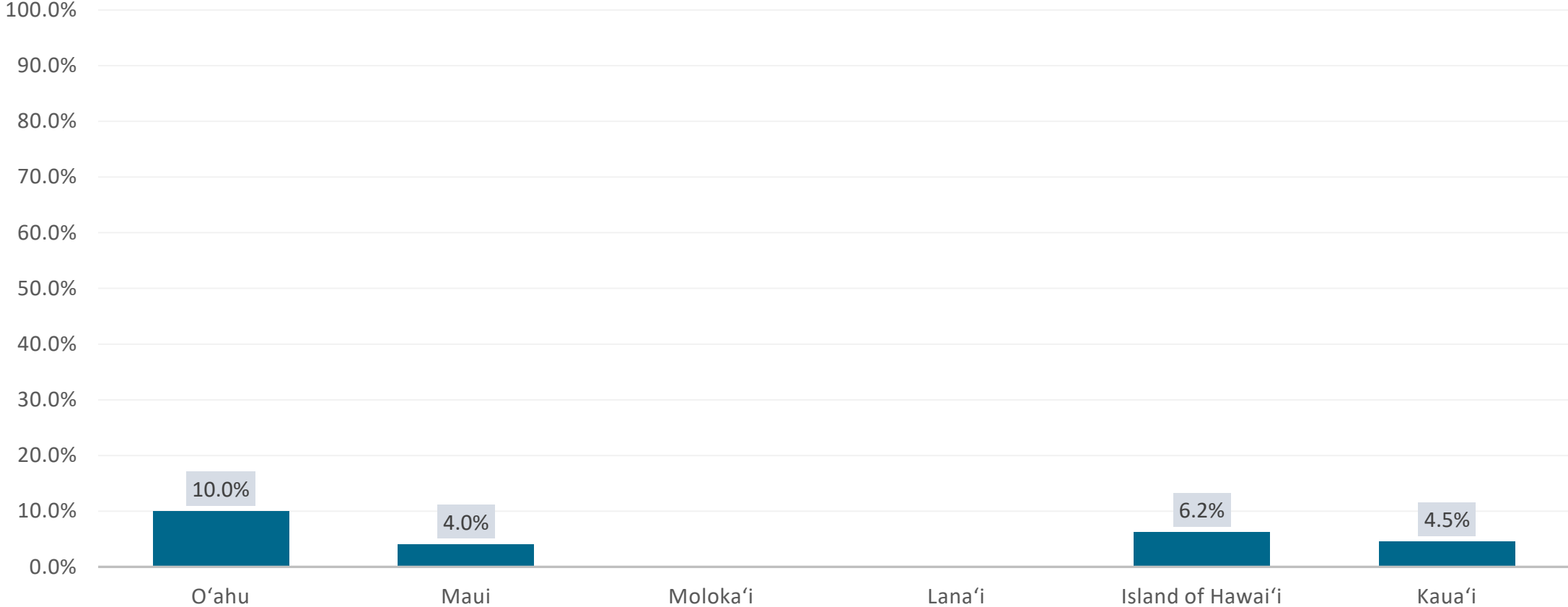


	2016	2017	2018	2019	2020	2021
Other	5.8%	7.7%	8.7%	9.2%	14.2%	8.6%
Once in a lifetime	8.3%	7.2%	5.9%	5.4%	4.6%	5.2%
More special than most trips	25.3%	26.8%	25.4%	25.0%	22.9%	28.4%
Annual/ Semi-annual trip	30.3%	26.2%	30.8%	32.6%	37.1%	30.8%
Special occasion	30.3%	32.1%	29.2%	27.8%	21.2%	27.1%

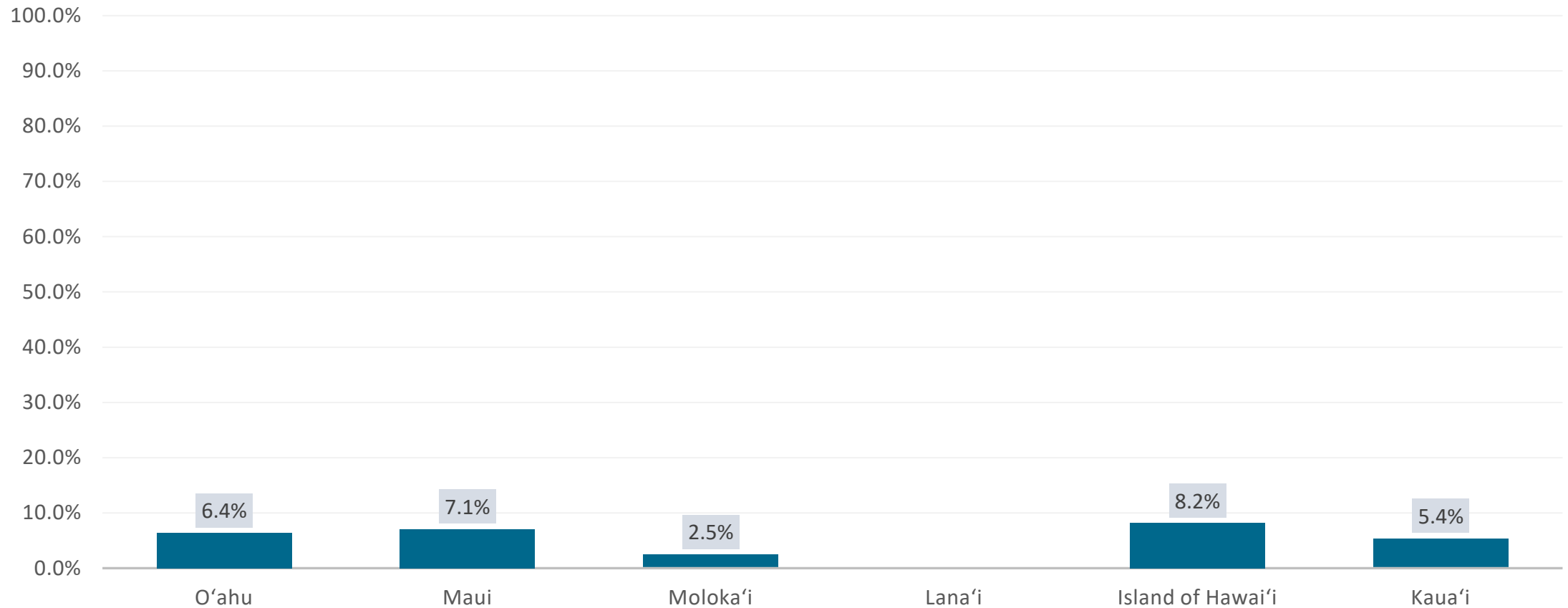
ADVERTISING AWARENES - U.S. WEST



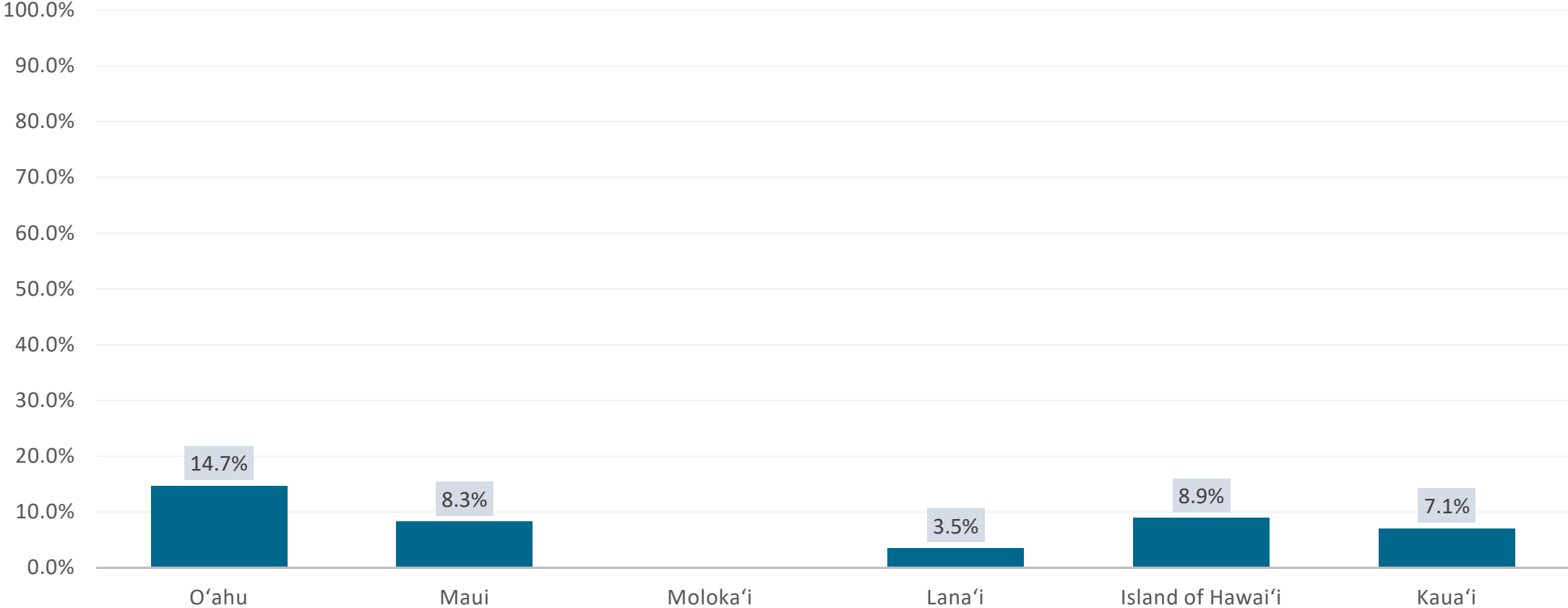
IMPACT OF LOCATION FILMING - U.S. WEST



IMPACT OF HAWAIIAN MUSIC - U.S. WEST

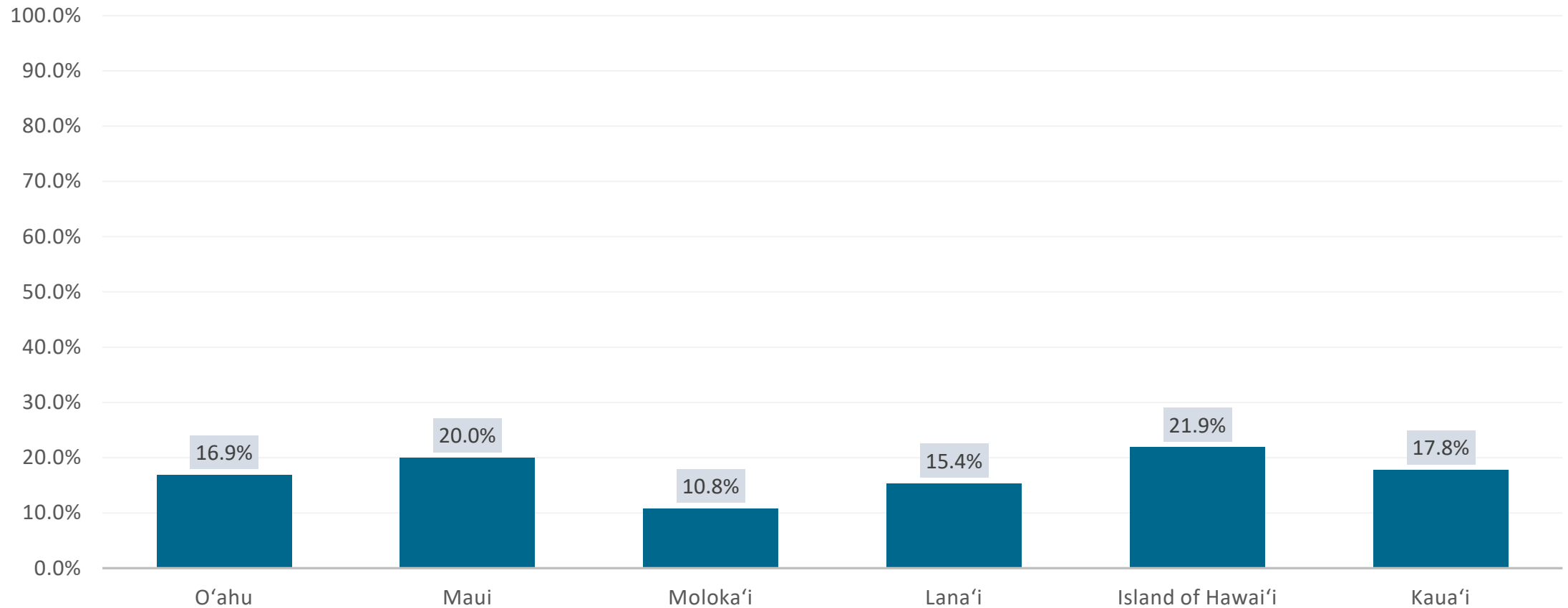


IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - U.S. WEST

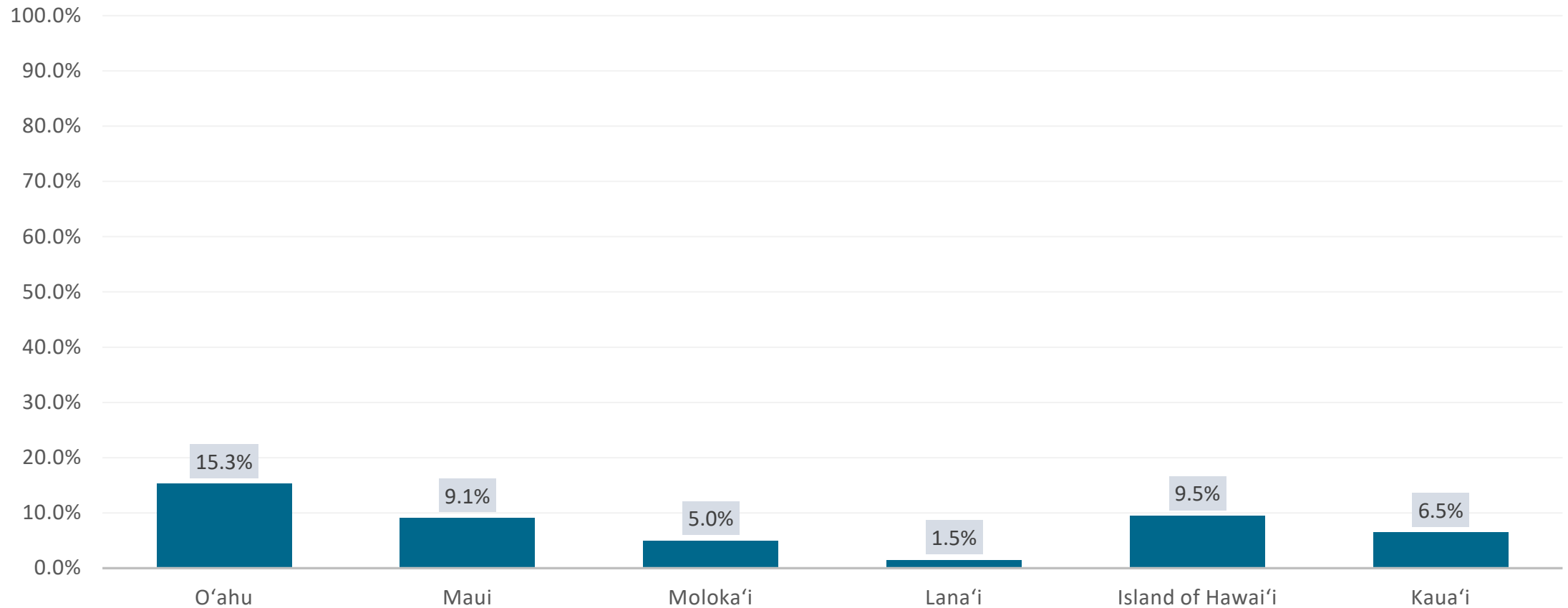


111 Q Which of the following, if any, motivated you to visit the island of _____?

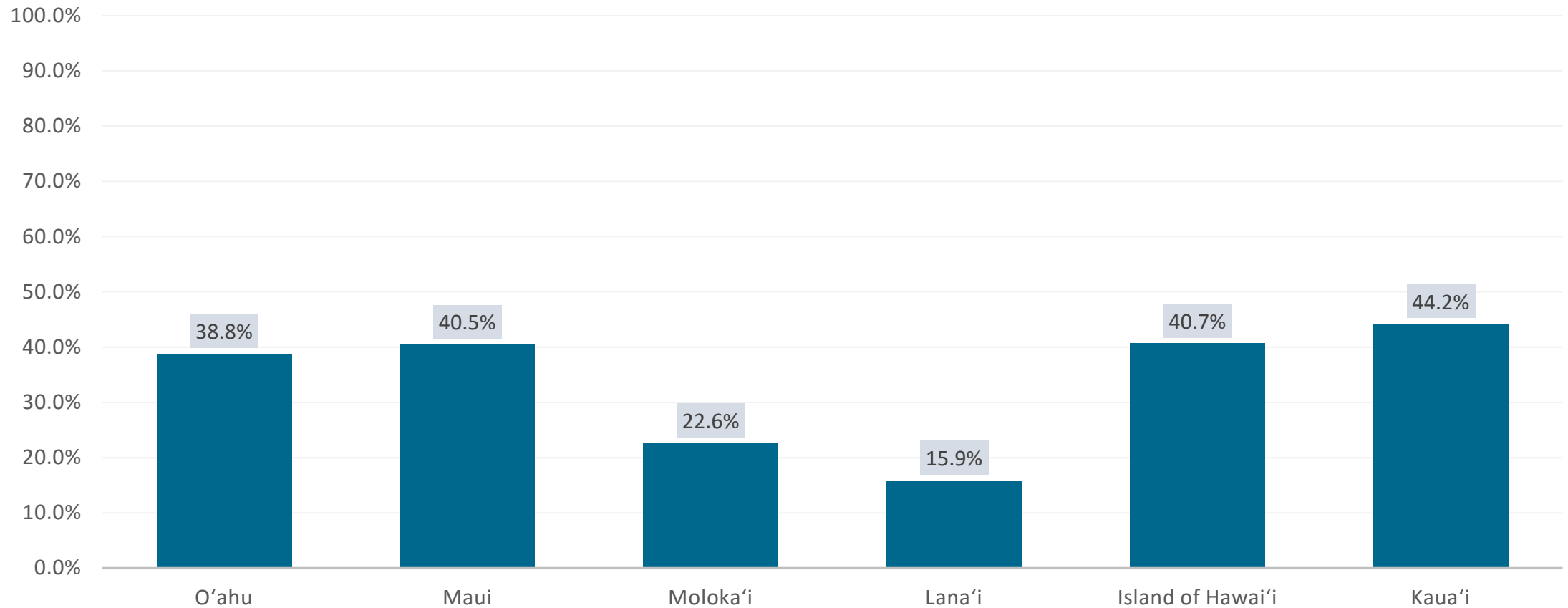
IMPACT OF OUTDOOR/ SPORTING EVENTS - U.S. WEST



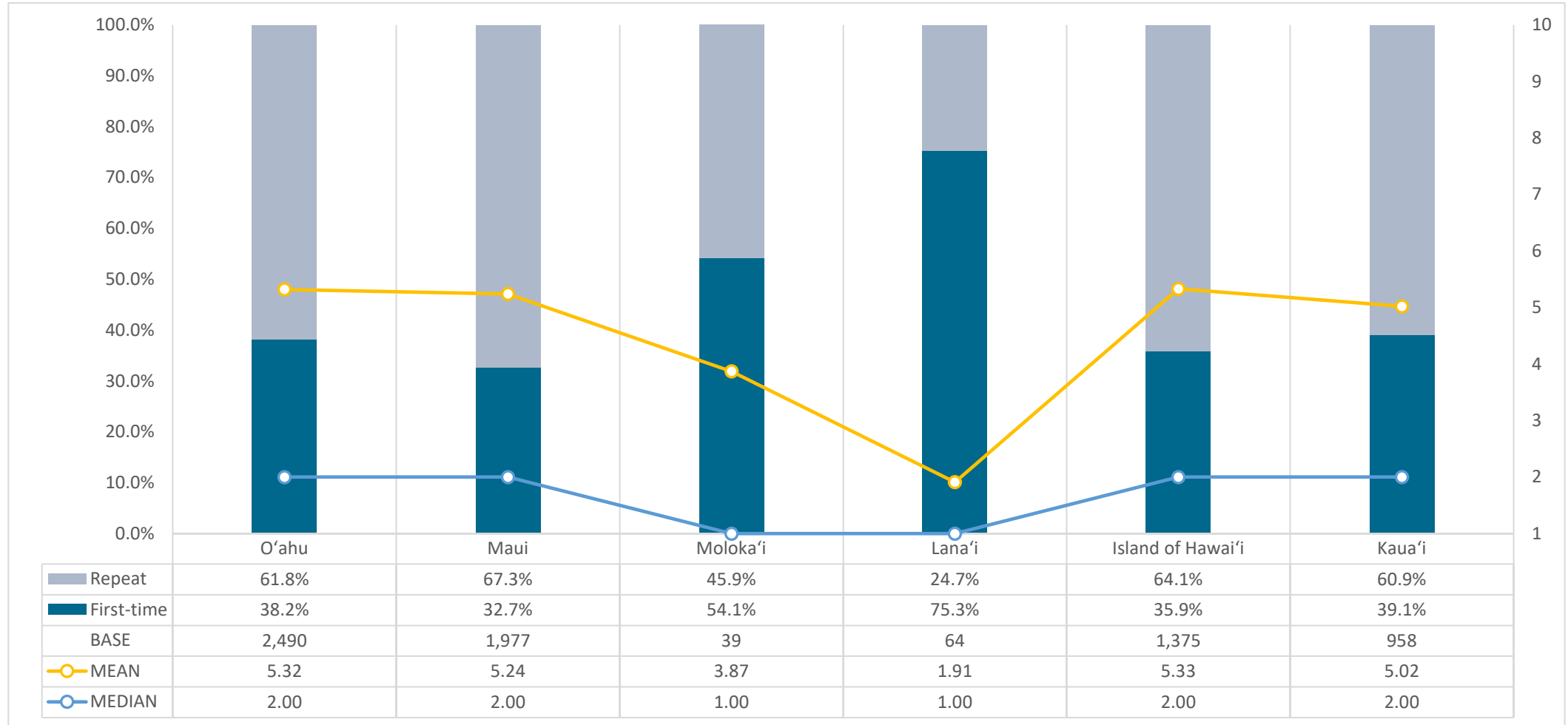
IMPACT OF HAWAIIAN CULTURAL EVENTS - U.S. WEST



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY- U.S. WEST



1ST TIME VS REPEAT VISITORS - U.S. WEST

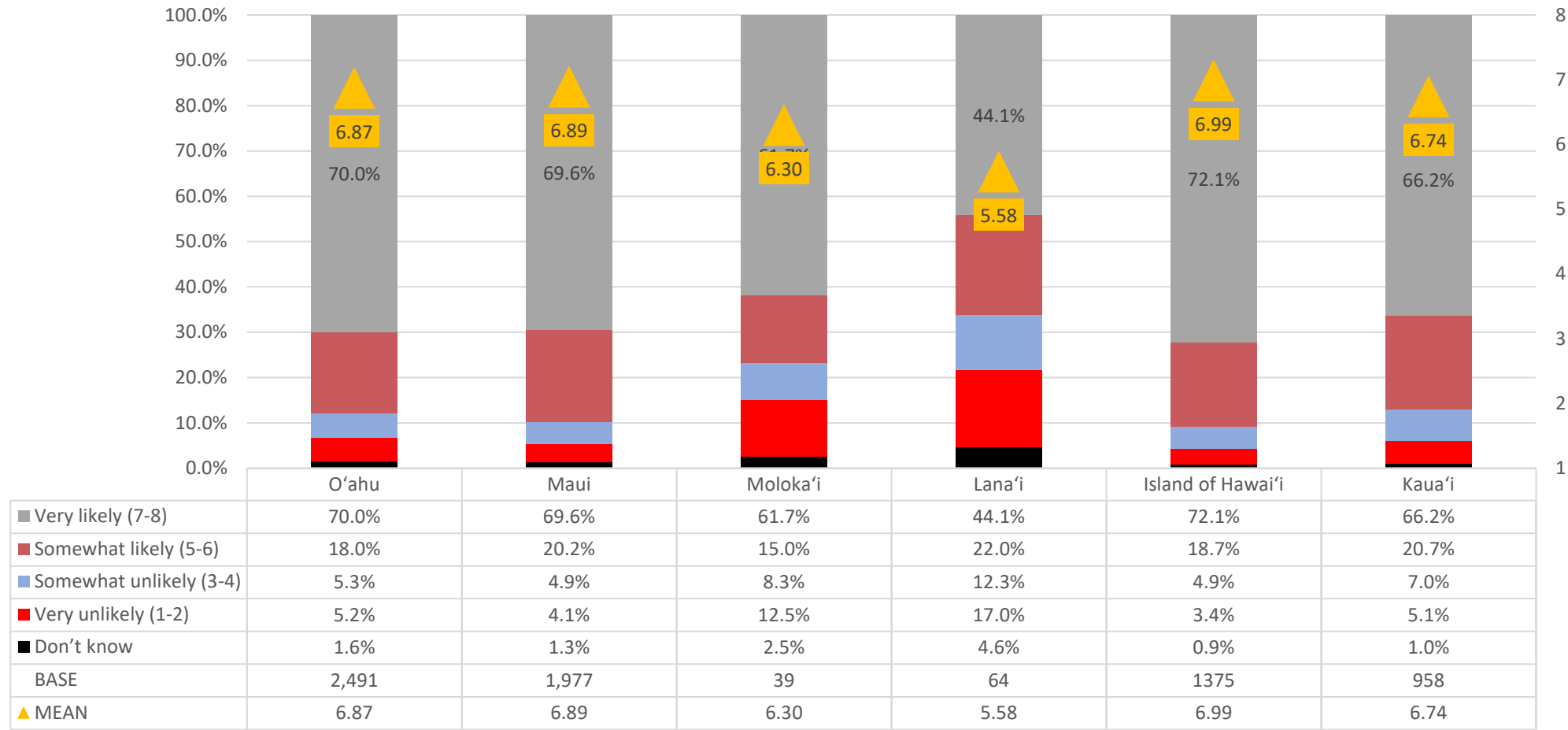


TRAVEL PARTY MEMBERS - U.S. WEST

	2016	2017	2018	2019	2020	2021
Spouse	63.3%	64.5%	61.1%	60.8%	51.5%	58.4%
Other adult family	28.8%	29.1%	29.9%	28.7%	22.1%	29.0%
Child under 18	25.4%	22.9%	27.6%	25.2%	22.8%	27.9%
Friends/ associates	16.5%	15.9%	15.7%	16.2%	15.5%	18.5%
Alone	10.7%	9.0%	9.0%	8.7%	17.2%	8.5%
Girlfriend/ boyfriend	6.4%	5.5%	7.1%	7.6%	8.9%	8.4%
Same sex partner	.6%	1.1%	1.2%	1.6%	1.1%	1.1%

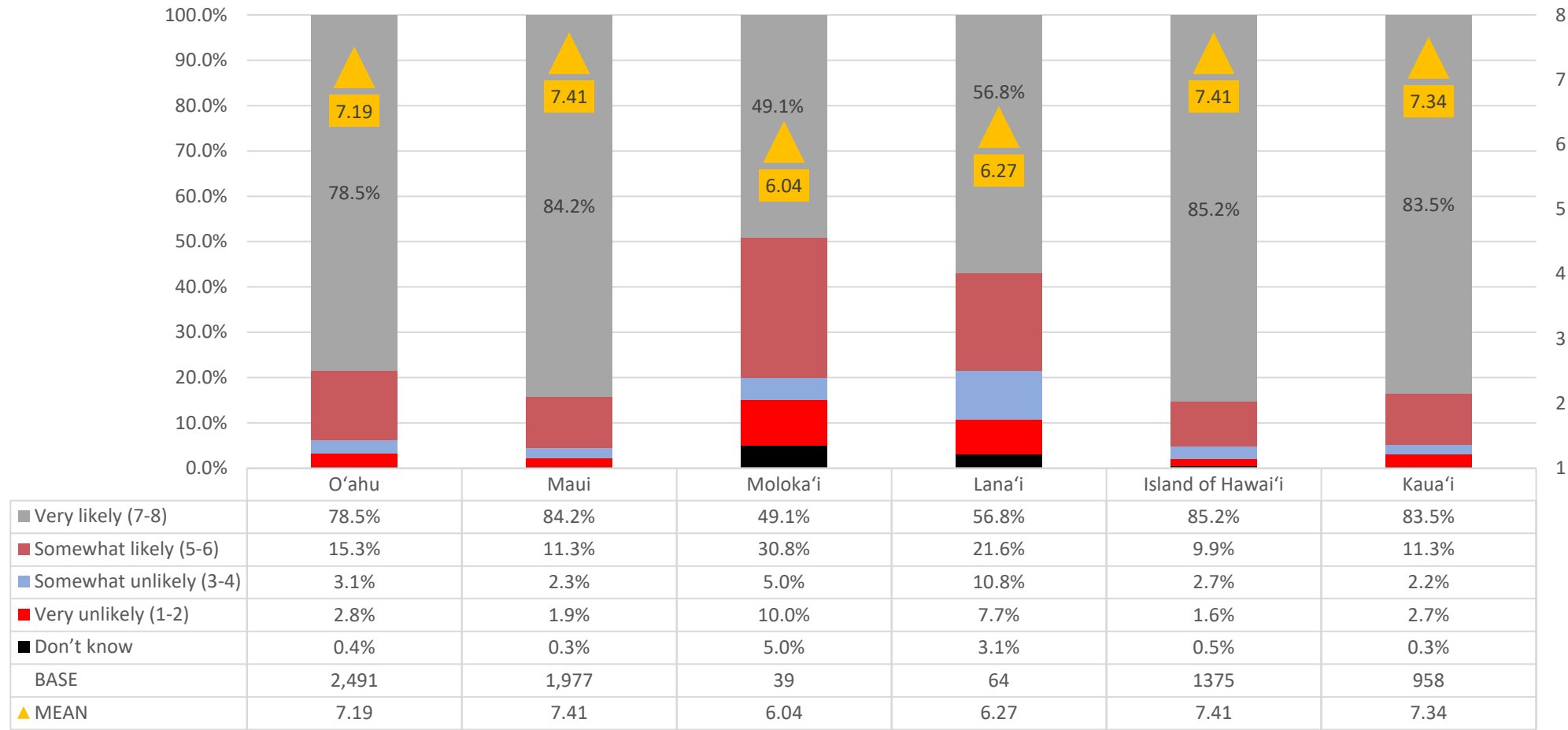
LIKELIHOOD OF RETURN VISIT - U.S. WEST

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



BRAND/ DESTINATION ADVOCACY – U.S. WEST

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



ACTIVITIES - SIGHTSEEING- U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	93.7%	94.5%	90.0%	87.2%	95.5%	96.1%
On own (self guided)	77.9%	83.3%	76.7%	33.9%	86.9%	88.9%
Helicopter/ airplane	1.9%	2.9%	8.3%	0.0%	3.1%	7.1%
Boat/ submarine/ whale watching	19.8%	35.8%	16.5%	31.7%	26.4%	27.3%
Visit towns/communities	41.4%	54.0%	36.6%	37.4%	53.8%	60.7%
Limo/ van/ bus tour	10.1%	2.9%	5.0%	13.9%	4.1%	1.2%
Scenic views/ natural landmark	54.9%	58.1%	39.1%	43.6%	61.9%	67.3%
Movie/ TV/ film location	8.9%	0.6%	0.0%	0.0%	0.8%	3.1%

ACTIVITIES - SIGHTSEEING- U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	96.7%	95.8%	95.0%	91.6%	94.8%
On own (self guided)	86.7%	85.1%	83.2%	81.8%	83.0%
Helicopter/ airplane	8.7%	6.6%	5.9%	2.8%	3.3%
Boat/ submarine/ whale	29.8%	25.9%	24.5%	20.9%	27.8%
Visit towns	34.6%	56.3%	53.9%	45.4%	50.7%
Limo/ van/ bus tour	9.5%	7.8%	7.5%	3.0%	5.9%
Scenic views/ natural landmark	70.3%	61.4%	58.9%	52.3%	59.4%
Movie/ TV/ film location	5.4%	4.1%	4.2%	3.0%	4.2%

ACTIVITIES - RECREATION - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.8%	98.3%	97.5%	89.2%	97.5%	97.0%
Beach/ sunbathing	87.8%	90.4%	71.7%	67.6%	85.5%	86.2%
Bodyboard	10.4%	16.6%	2.5%	10.8%	15.3%	13.2%
Stand Up Paddleboard	8.2%	7.0%	7.5%	0.0%	8.0%	3.9%
Surfing	10.3%	8.1%	0.0%	0.0%	4.1%	8.5%
Canoeing/ kayak	7.3%	5.1%	5.0%	0.0%	10.7%	13.9%
Swim ocean	70.1%	75.5%	54.1%	52.2%	72.1%	66.6%
Snorkel	39.8%	59.8%	31.6%	42.5%	61.6%	49.6%
Freediving	1.5%	1.9%	2.5%	0.0%	2.9%	0.4%
Windsurf/ Kitesurf	0.3%	0.5%	0.0%	0.0%	0.1%	0.2%
Jet ski/ Parasail	2.9%	1.8%	0.0%	0.0%	1.4%	0.1%
Scuba	2.2%	3.7%	0.0%	4.6%	3.9%	2.6%
Fishing	2.3%	2.6%	23.3%	1.5%	5.1%	1.5%
Golf	3.3%	9.0%	8.3%	17.4%	11.9%	11.4%

ACTIVITIES - RECREATION - U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	96.5%	97.0%	96.4%	93.7%	97.8%
Beach/ sunbathing	85.3%	85.5%	84.7%	82.6%	88.6%
Bodyboard	20.3%	17.0%	14.0%	14.7%	14.0%
Stand up Paddle Boarding	*	*	*	8.2%	7.4%
Surfing	7.1%	6.7%	6.3%	10.3%	8.4%
Canoeing/ kayak	10.2%	8.7%	8.0%	7.0%	8.5%
Swim ocean	NA	68.3%	67.7%	66.5%	72.6%
Snorkel	NA	49.9%	48.1%	47.9%	52.3%
Freediving	NA	NA	NA	2.1%	1.8%
Windsurf/ Kitesurf	0.4%	0.2%	0.3%	0.3%	0.3%
Jet ski/ Parasail	2.4%	2.3%	1.8%	1.4%	1.9%
Scuba	4.1%	3.1%	3.4%	4.0%	3.1%
Fishing	3.7%	3.4%	3.5%	3.9%	3.1%
Golf	9.1%	7.4%	6.9%	8.3%	8.1%

ACTIVITIES - RECREATION - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	96.8%	98.3%	97.5%	89.2%	97.5%	97.0%
Run/ Jog/ Fitness walk	30.1%	37.3%	43.4%	15.9%	32.9%	37.2%
Spa	6.7%	10.9%	2.5%	12.8%	9.0%	6.7%
Hiking	45.6%	43.8%	51.6%	34.4%	49.9%	51.2%
Backpack/Camping	0.8%	1.1%	8.3%	1.5%	1.3%	3.1%
Agritourism	11.4%	7.4%	10.0%	6.2%	12.6%	9.0%
Sport event/ tournament	0.7%	0.3%	2.5%	0.0%	1.1%	0.2%
Park/ botanical garden	35.6%	26.2%	10.0%	13.9%	35.9%	31.1%
Waterpark	1.9%	0.8%	0.0%	0.0%	0.8%	0.4%
Mountain tube/ waterfall rappel	0.4%	0.4%	0.0%	0.0%	0.4%	7.2%
Zip lining	4.8%	5.0%	0.0%	3.1%	3.7%	4.3%
Skydiving	0.6%	0.0%	0.0%	0.0%	0.6%	0.1%
All terrain vehicle (ATV)	5.9%	1.3%	2.5%	9.2%	2.9%	4.8%
Horseback riding	2.0%	0.8%	0.0%	3.1%	2.3%	1.2%

ACTIVITIES - RECREATION - U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	96.5%	97.0%	96.4%	93.7%	97.8%
Run/ Jog/ Fitness walk	35.5%	30.8%	26.3%	38.8%	34.3%
Spa	9.2%	10.1%	9.6%	6.3%	8.8%
Hiking	28.5%	32.4%	47.0%	45.5%	47.7%
Backpack/Camp	*	*	1.8%	1.8%	1.4%
Agritourism	9.9%	13.6%	13.5%	8.1%	10.5%
Sport event/ tournament	1.9%	2.8%	2.8%	0.8%	0.6%
Park/ botanical garden	40.7%	38.2%	35.4%	26.9%	33.1%
Waterpark	NA	1.5%	1.4%	0.8%	1.2%
Mountain tube/ waterfall rappel	NA	2.0%	2.3%	1.3%	1.4%
Zip lining	NA	6.0%	6.1%	3.2%	4.7%
Skydiving	NA	0.4%	0.6%	0.4%	0.4%
All terrain vehicle (ATV)	NA	2.9%	3.0%	2.7%	4.1%
Horseback riding	NA	2.3%	2.1%	1.8%	1.7%

ACTIVITIES - ENTERTAINMENT & DINING - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.9%	99.2%	100.0%	89.2%	99.3%	99.3%
Lunch/ sunset/ dinner/ evening cruise	20.3%	22.6%	5.7%	24.7%	18.7%	19.6%
Live music/ stage show	21.8%	20.4%	5.0%	7.7%	19.0%	14.1%
Nightclub/ dancing/ bar/ karaoke	7.3%	5.7%	2.5%	1.5%	5.6%	4.2%
Fine dining	48.9%	58.0%	18.3%	42.5%	51.0%	51.5%
Family restaurant	61.4%	60.9%	44.1%	17.0%	60.9%	57.1%
Fast food	51.7%	29.1%	22.6%	9.7%	30.4%	31.1%
Food truck	47.3%	43.8%	20.8%	1.5%	18.2%	44.2%
Café/ coffee house	46.4%	47.6%	23.3%	17.0%	49.6%	48.0%
Ethnic dining	30.7%	22.2%	15.0%	6.2%	24.9%	22.6%
Prepared own meal	37.0%	63.4%	90.0%	22.0%	66.9%	70.2%

ACTIVITIES - ENTERTAINMENT & DINING - U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	98.9%	98.4%	98.1%	97.7%	99.1%
Lunch/ sunset/ dinner/ evening cruise	27.3%	23.0%	20.9%	16.4%	21.2%
Live music/ stage show	31.6%	32.2%	30.3%	12.2%	20.4%
Nightclub/ dancing/ bar/ karaoke	9.3%	9.4%	8.9%	4.7%	6.3%
Fine dining	53.2%	53.6%	53.1%	44.0%	53.1%
Family restaurant	70.8%	62.8%	61.8%	55.5%	61.1%
Fast food	39.4%	36.5%	34.7%	37.4%	38.6%
Food truck	NA	30.7%	30.6%	36.1%	40.9%
Café/ coffee house	42.5%	46.6%	46.0%	41.6%	48.1%
Ethnic dining	30.5%	31.9%	31.9%	23.2%	26.4%
Prepared own meal	52.2%	55.1%	52.1%	64.6%	56.5%

ACTIVITIES - SHOPPING - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.2%	97.7%	95.0%	59.0%	96.9%	97.0%
Mall/ department store	54.7%	38.4%	2.5%	0.0%	24.0%	22.1%
Designer boutique	17.7%	18.3%	5.0%	4.6%	12.3%	16.4%
Hotel/ resort store	38.5%	31.3%	5.0%	18.5%	28.2%	22.2%
Swap meet/ flea market	21.1%	12.8%	5.0%	0.0%	10.9%	5.1%
Discount/ outlet store	12.7%	16.2%	5.7%	0.0%	9.1%	10.4%
Supermarket	57.4%	77.9%	56.6%	15.4%	76.2%	79.3%
Farmer's market	22.7%	30.1%	25.8%	3.1%	55.6%	44.0%
Convenience store	60.0%	50.5%	23.3%	12.3%	39.9%	43.4%
Duty free store	4.6%	2.3%	0.0%	0.0%	1.1%	1.2%
Local shop/ artisan	53.3%	68.2%	62.4%	34.4%	62.8%	72.1%

ACTIVITIES - SHOPPING - U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	97.0%	96.7%	95.9%	92.9%	97.1%
Mall/ department store	43.6%	42.4%	42.0%	34.8%	40.0%
Designer boutique	22.3%	17.5%	17.3%	13.9%	17.0%
Hotel/ resort store	33.0%	33.5%	33.1%	21.4%	32.7%
Swap meet/ flea market	22.8%	17.4%	16.7%	10.2%	14.8%
Discount/ outlet store	20.9%	17.3%	15.9%	13.1%	13.0%
Supermarket	58.1%	68.2%	66.1%	71.8%	71.0%
Farmer's market	33.0%	37.2%	37.0%	30.8%	35.2%
Convenience store	42.9%	46.5%	46.9%	44.2%	51.7%
Duty free store	3.1%	3.7%	3.8%	1.7%	2.8%
Local shop/ artisan	68.4%	65.7%	64.7%	54.1%	62.8%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	64.6%	54.8%	54.1%	35.9%	62.0%	52.3%
Historic military site	35.7%	3.7%	5.0%	6.2%	6.6%	5.0%
Historic Hawaiian site	27.0%	22.1%	40.9%	13.9%	37.7%	26.9%
Other historical site	12.2%	9.6%	10.0%	1.5%	14.7%	8.7%
Art museums	3.0%	1.4%	0.0%	1.5%	2.0%	1.4%
Art gallery and exhibition	3.9%	14.1%	3.2%	9.2%	9.3%	9.6%
Luau/ Polynesian show/ hula show	24.9%	19.1%	5.0%	6.2%	15.3%	9.4%
Lesson ex. ukulele, hula, canoe, lei making	3.7%	2.6%	3.2%	2.0%	2.4%	2.9%
Play/ concert/ theatre	1.3%	0.8%	0.0%	0.0%	0.9%	1.3%
Art/ craft fair	3.2%	10.8%	0.0%	1.5%	10.1%	9.7%
Festival event	3.2%	2.2%	7.5%	3.1%	2.2%	2.9%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	74.1%	71.8%	68.7%	45.0%	60.4%
Historic military site	27.5%	18.6%	15.6%	12.2%	16.8%
Historic Hawaiian site	*	*	*	*	28.4%
Other historical site	30.9%	29.2%	26.8%	19.9%	11.8%
Museum/ art gallery	22.9%	19.2%	18.4%	9.6%	NA
Art museum	*	*	*	*	2.1%
Art gallery	*	*	*	*	9.1%
Luau/ Polynesian show/ hula show	37.3%	32.0%	29.4%	8.0%	19.8%
Lesson ex. ukulele, hula, canoe, lei making	4.8%	7.1%	6.8%	2.7%	3.1%
Play/ concert/ theatre	4.5%	4.7%	4.5%	1.2%	1.1%
Art/ craft fair	14.4%	15.0%	14.6%	6.9%	7.9%
Festival event	10.1%	5.3%	5.6%	4.9%	2.7%

ACTIVITIES - TRANSPORTATION- U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	89.5%	94.6%	79.2%	67.2%	91.3%	92.0%
Airport shuttle	17.2%	7.7%	10.0%	31.3%	13.2%	18.5%
Trolley	1.6%	3.1%	0.0%	0.0%	0.3%	0.1%
Public bus	8.2%	2.3%	5.0%	0.0%	0.5%	1.5%
Tour bus/ tour van	9.4%	2.4%	2.5%	12.3%	3.4%	2.0%
Taxi/ limo	13.9%	6.1%	2.5%	22.5%	6.3%	9.2%
Rental car	64.0%	86.3%	66.7%	13.9%	85.0%	84.8%
Ride share	29.6%	10.0%	2.5%	1.5%	6.4%	8.2%
Bicycle rental	3.5%	1.8%	2.5%	0.0%	2.3%	4.4%

ACTIVITIES - TRANSPORTATION- U.S. WEST

	2017	2018	2019	2020	2021
TOTAL	95.1%	92.8%	92.3%	84.9%	91.8%
Airport shuttle	19.6%	18.4%	15.6%	9.1%	14.4%
Trolley	2.5%	2.3%	2.8%	1.3%	1.6%
Public bus	5.2%	4.4%	3.9%	2.4%	4.1%
Tour bus/ tour van	9.7%	8.9%	8.7%	2.8%	5.4%
Taxi/ limo	13.4%	7.6%	6.2%	5.2%	10.0%
Rental car	82.8%	80.0%	79.3%	74.8%	77.8%
Ride share	NA	12.1%	15.1%	13.1%	16.7%
Bicycle rental	NA	2.7%	2.2%	2.6%	3.0%

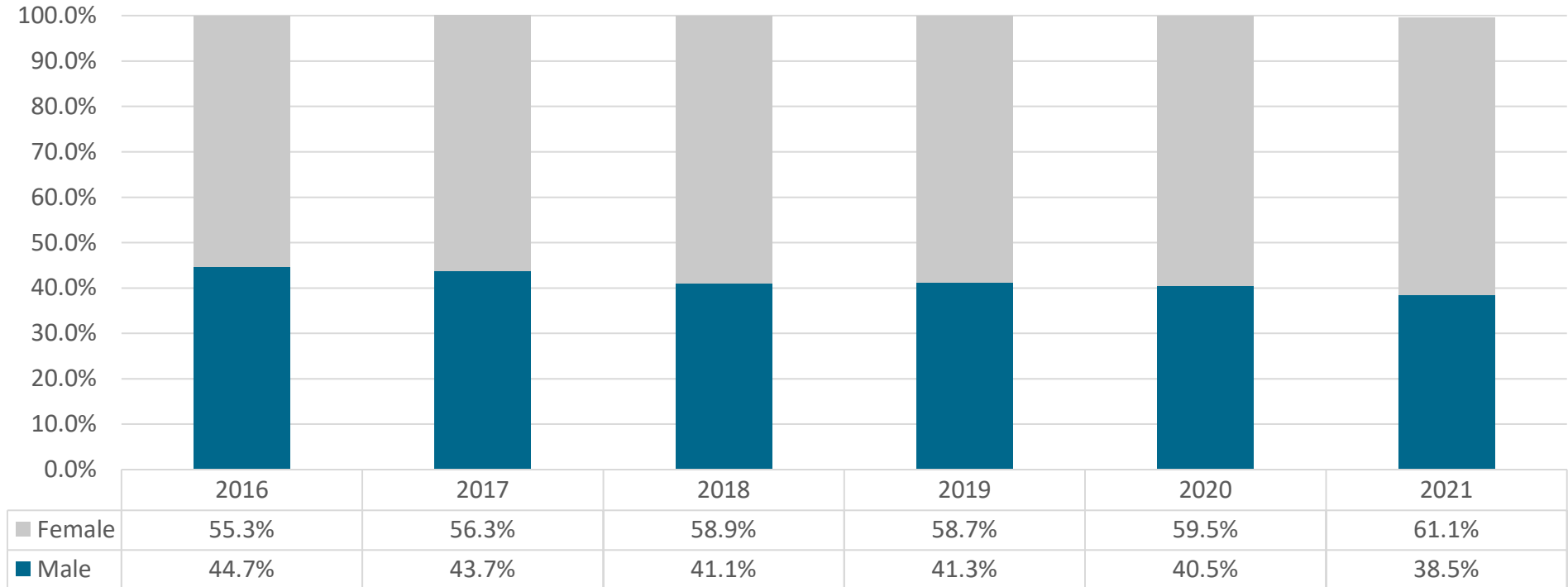
ACTIVITIES - OTHER - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	37.9%	23.7%	45.9%	4.6%	33.4%	24.1%
Visit friends/ family	37.1%	22.6%	43.4%	3.1%	32.5%	22.7%
Volunteer non profit	1.3%	1.5%	10.0%	1.5%	1.2%	2.1%

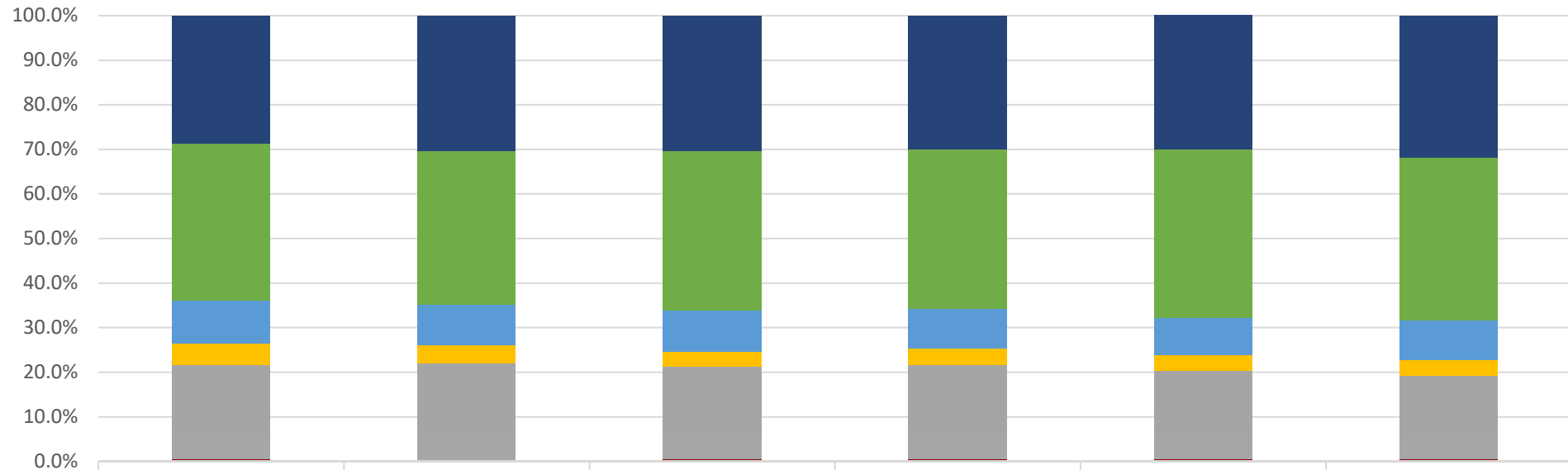
ACTIVITIES - OTHER - U.S. WEST

	2018	2019	2020	2021
TOTAL	31.3%	29.7%	37.5%	31.7%
Visit friends/ family	30.5%	29.0%	37.0%	30.7%
Volunteer non profit	1.5%	1.0%	1.0%	1.5%

VISITOR PROFILE - GENDER - U.S. WEST

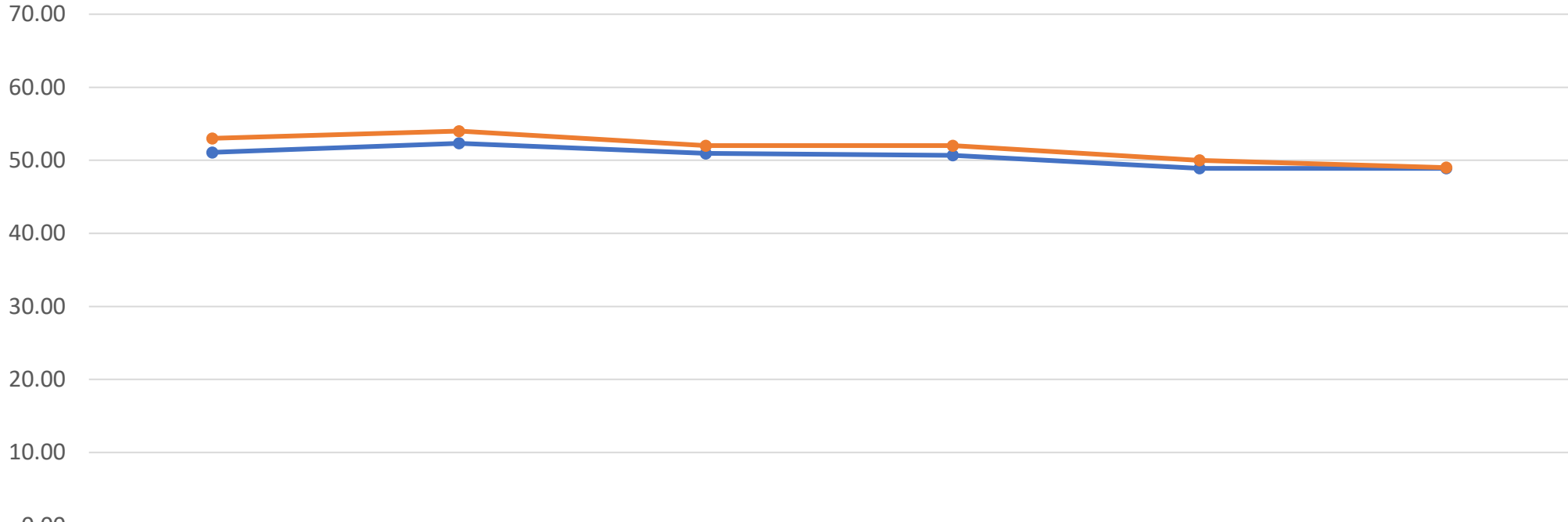


VISITOR PROFILE - EDUCATION - U.S. WEST



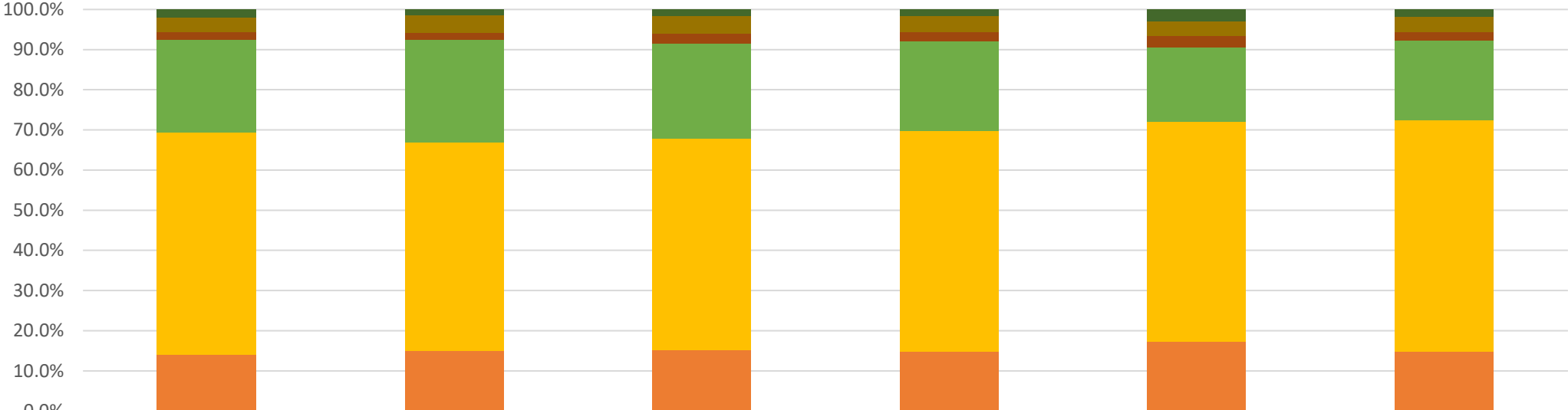
	2016	2017	2018	2019	2020	2021
■ Post-Graduate	28.7%	30.3%	30.3%	29.9%	30.2%	31.9%
■ College Grad	35.1%	34.6%	35.8%	35.8%	37.6%	36.6%
■ Associate Degree	9.8%	9.0%	9.3%	9.0%	8.5%	8.9%
■ Vocational/ Tech	4.8%	4.1%	3.4%	3.6%	3.5%	3.5%
■ Some College	15.9%	16.3%	15.5%	15.9%	15.0%	13.8%
■ H.S. Grad	5.3%	5.5%	5.3%	5.4%	4.9%	5.0%
■ Some / No H.S.	0.4%	0.2%	0.4%	0.4%	0.4%	0.4%

VISITOR PROFILE - AGE - U.S. WEST



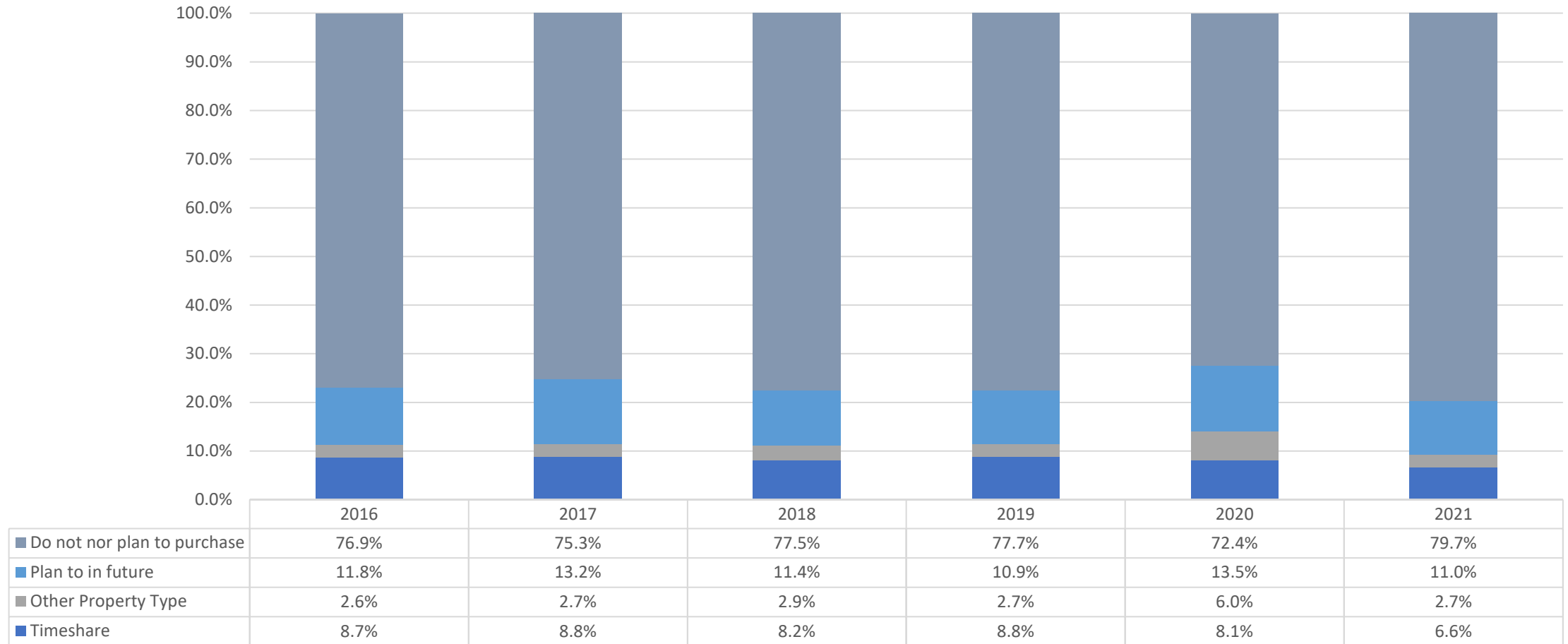
	2016	2017	2018	2019	2020	2021
MEAN	51.09	52.33	50.94	50.69	48.90	48.91
MEDIAN	53.00	54.00	52.00	52.00	50.00	49.00

VISITOR PROFILE - EMPLOYMENT STATUS - U.S. WEST



	2016	2017	2018	2019	2020	2021
Other	2.0%	1.3%	1.7%	1.6%	2.9%	1.9%
Homemaker	3.7%	4.5%	4.3%	4.1%	3.7%	3.7%
Student	1.9%	1.8%	2.5%	2.2%	3.1%	2.3%
Retired	23.0%	25.5%	23.6%	22.3%	18.4%	19.8%
Employed	55.3%	51.9%	52.7%	55.1%	54.7%	57.5%
Self-employed	14.1%	14.9%	15.2%	14.7%	17.3%	14.8%

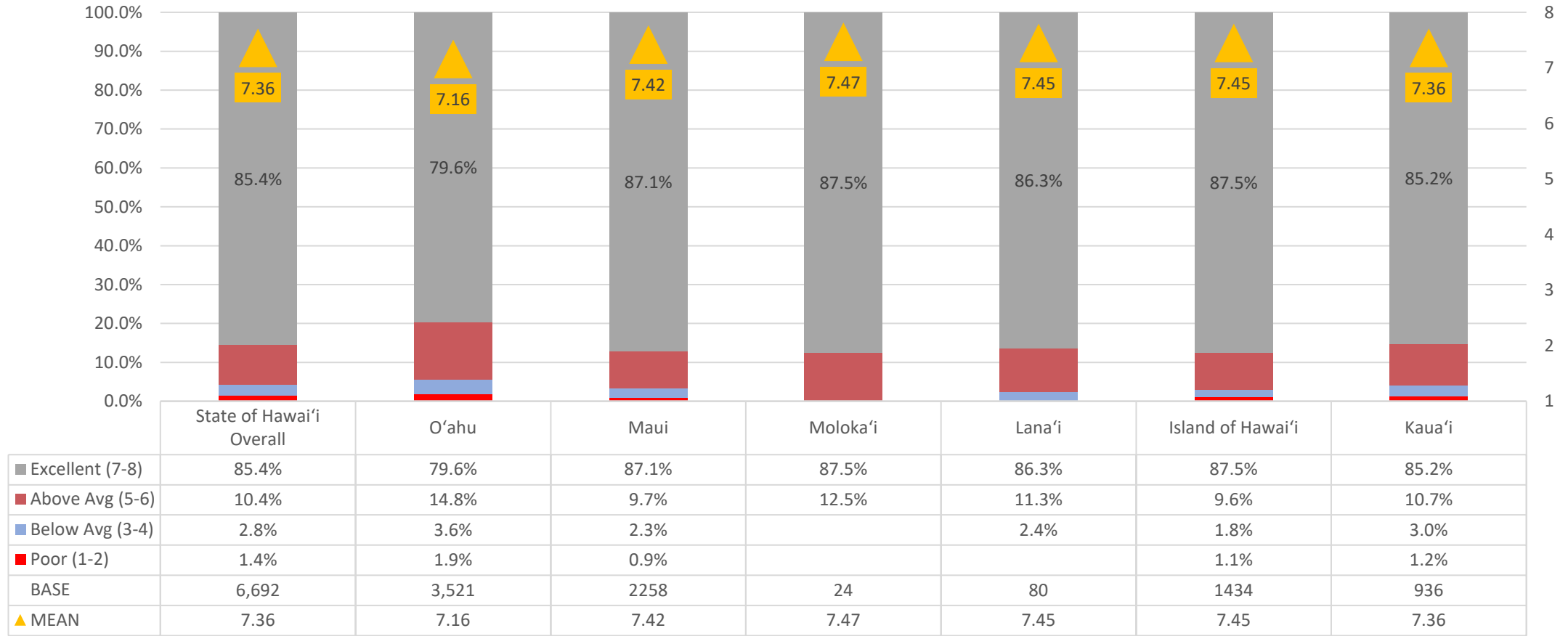
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - U.S. WEST



Section – U.S. East

OVERALL SATISFACTION - MOST RECENT TRIP - U.S. EAST

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



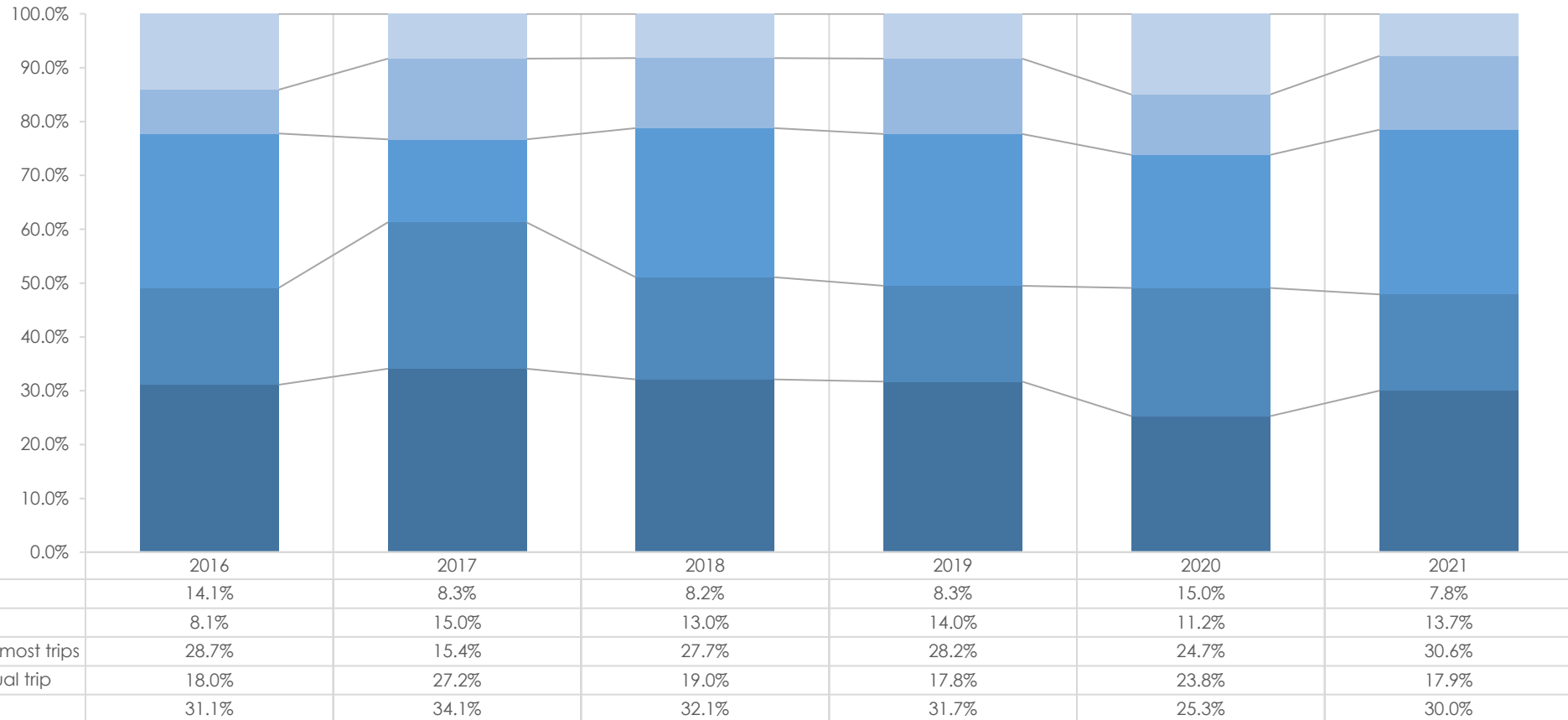
PRIMARY PURPOSE OF TRIP - U.S. EAST

	2018	2019	2020	2021
Vacation	55.8%	56.2%	54.1%	68.8%
Visit friends/ relatives	9.3%	8.6%	26.0%	14.3%
Honeymoon	3.8%	3.9%	2.9%	5.2%
Anniversary/ birthday	9.0%	9.9%	2.2%	2.7%
Other business	4.7%	4.7%	4.3%	2.6%
Attend wedding/ vow renewal	2.8%	2.3%	0.5%	0.9%
To get married	0.7%	0.9%	1.1%	0.8%
Government/ military	0.5%	0.3%	2.6%	0.7%
Convention, conference, seminar	4.1%	2.9%	1.3%	0.6%
Vacation home/ timeshare	2.2%	2.0%	0.2%	0.1%
Family gathering/ reunion	1.6%	2.0%	-	0.0%

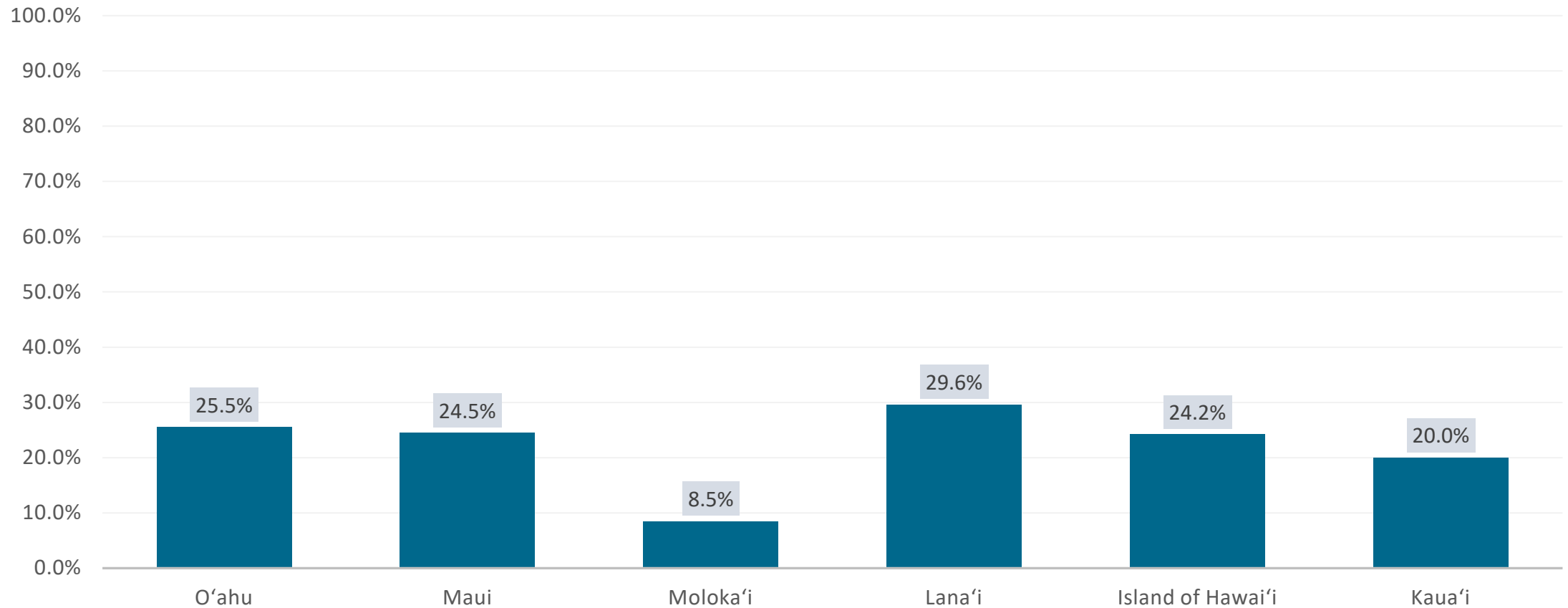
PRIMARY + SECONDARY PURPOSE OF TRIP - U.S. EAST

	2018	2019	2020	2021
Vacation	82.6%	82.2%	76.7%	87.9%
Visit friends/ relatives	16.1%	15.6%	33.6%	22.0%
Honeymoon	4.5%	4.6%	3.9%	6.3%
Anniversary/ birthday	16.0%	16.8%	3.7%	5.6%
Other business	6.1%	6.1%	6.2%	4.1%
Incentive trip	1.9%	2.6%	1.4%	1.8%
Government/ military	0.6%	0.5%	3.0%	1.0%
Convention, conference, seminar	5.1%	3.6%	1.7%	0.9%
Vacation home/ timeshare	4.8%	4.4%	0.3%	0.3%
Family gathering/ reunion	5.2%	5.5%	-	0.2%

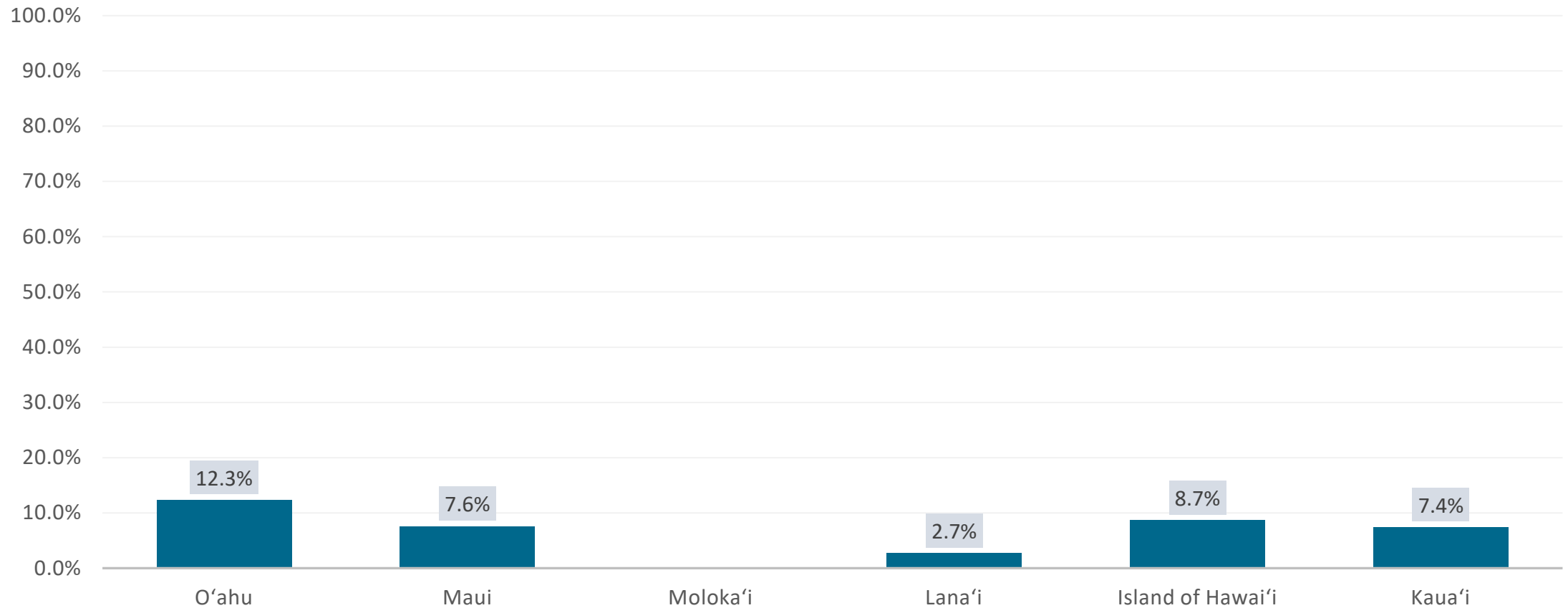
VACATION TRIP DESCRIPTION - U.S. EAST



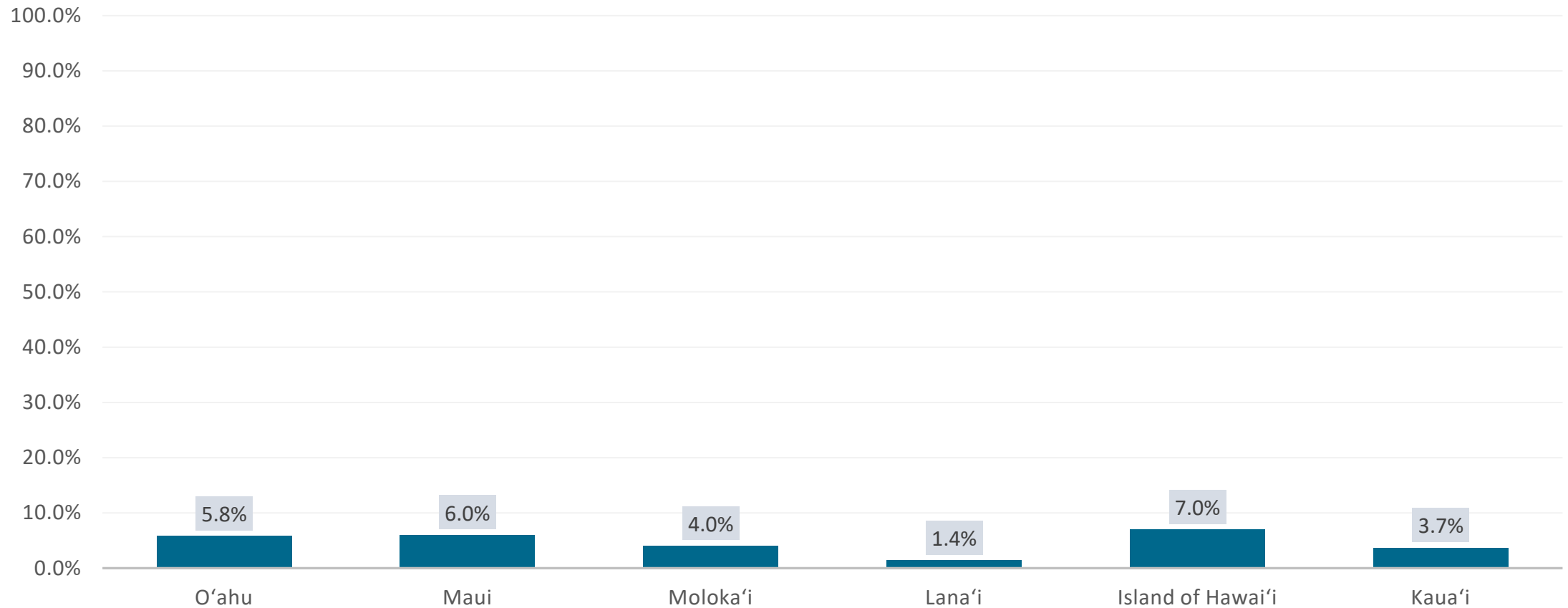
ADVERTISING AWARENES - U.S. EAST



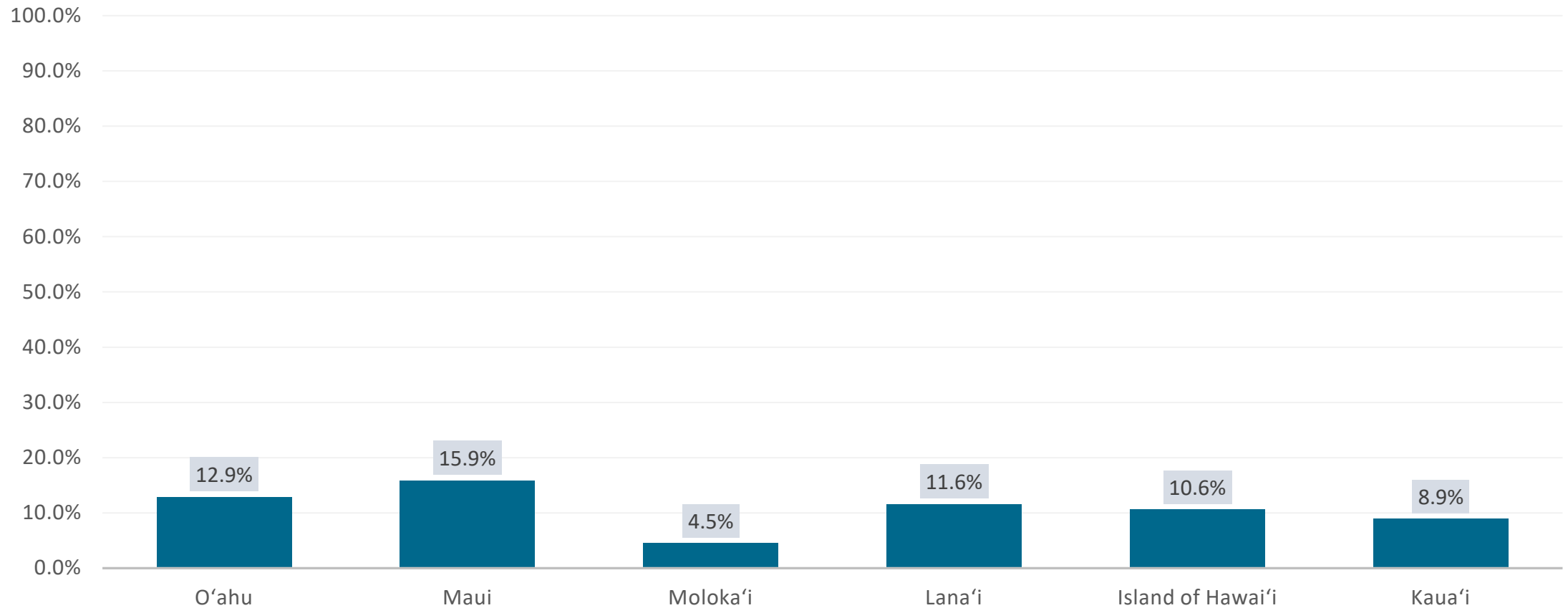
IMPACT OF LOCATION FILMING - U.S. EAST



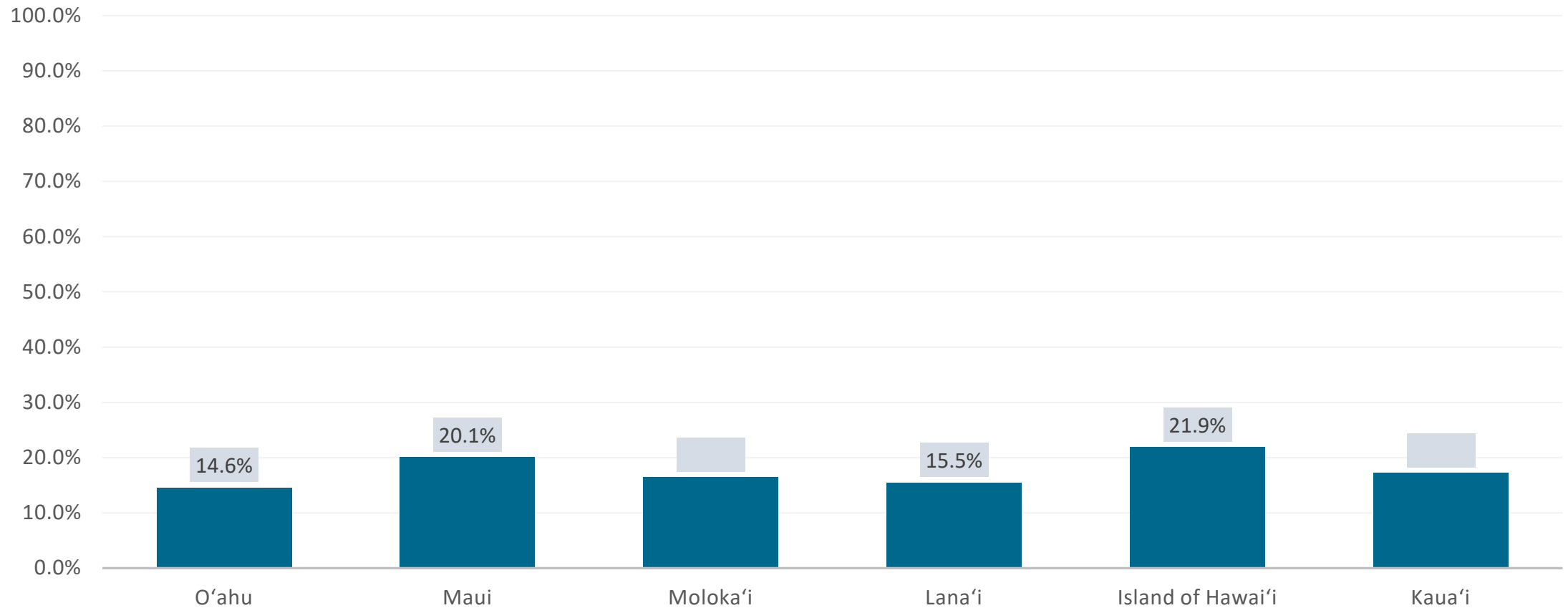
IMPACT OF HAWAIIAN MUSIC - U.S. EAST



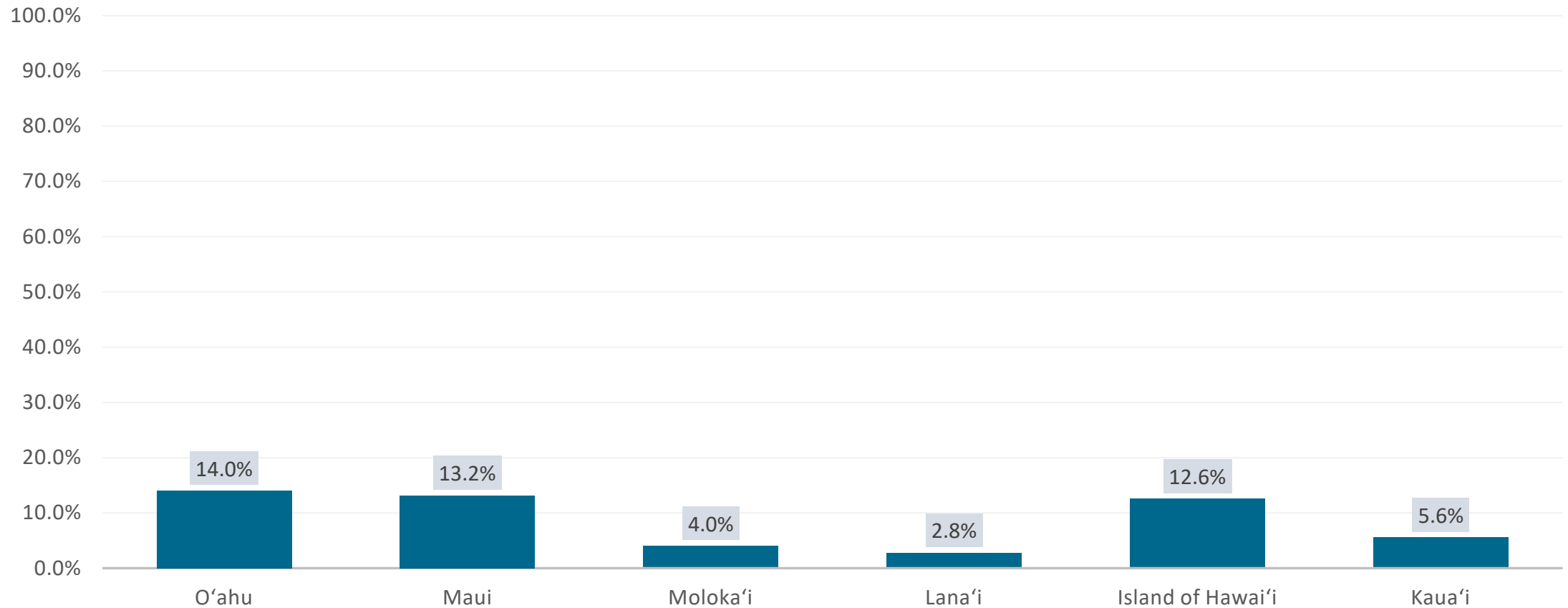
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - U.S. EAST



IMPACT OF OUTDOOR/ SPORTING EVENTS - U.S. EAST

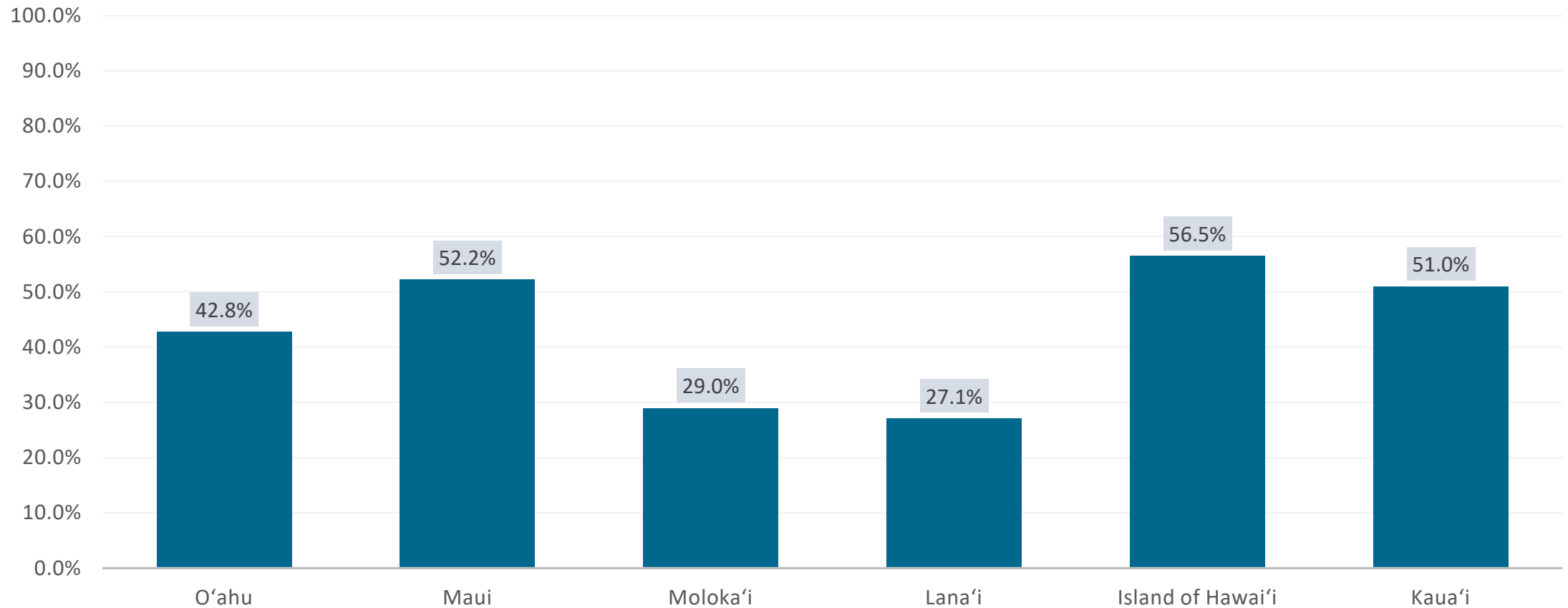


IMPACT OF HAWAIIAN CULTUREAL EVENTS - U.S. EAST

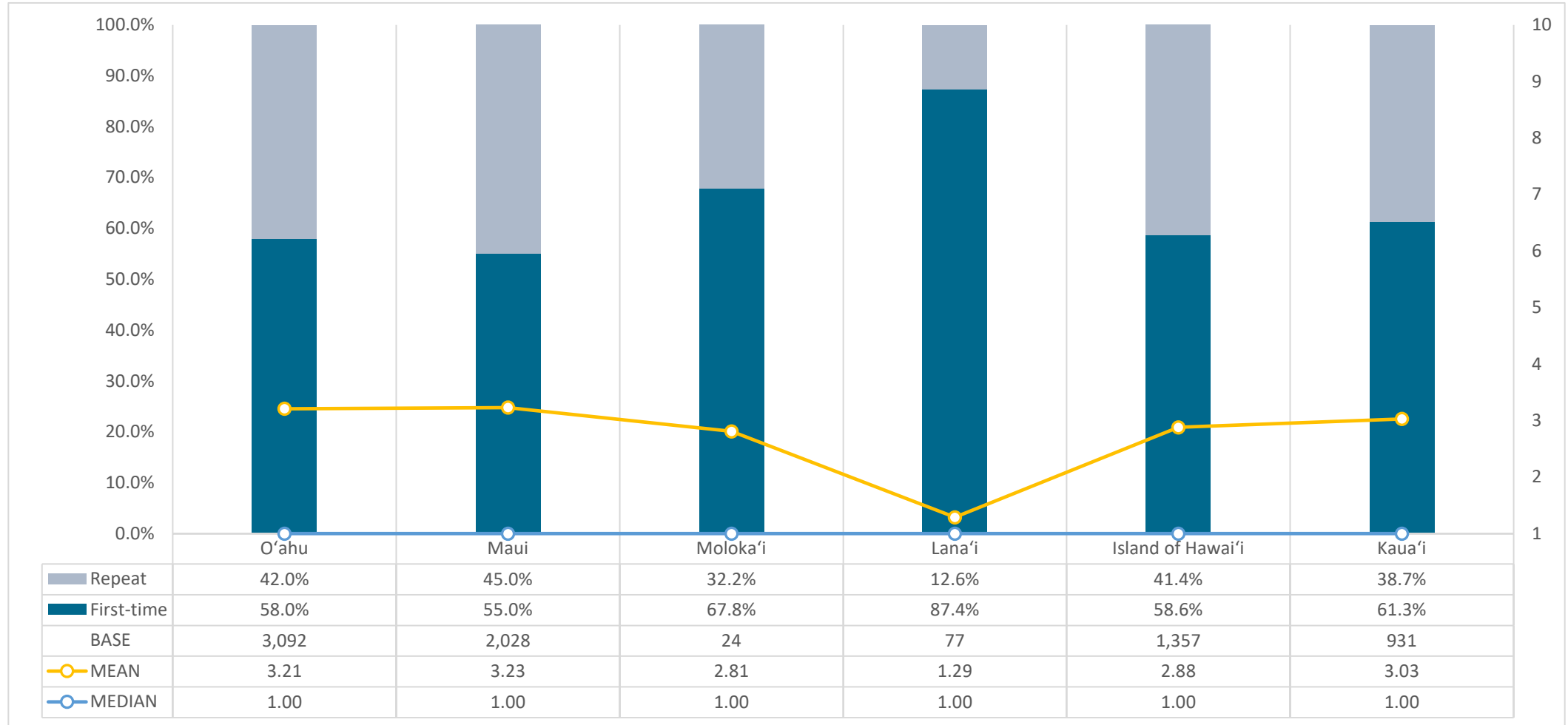


150 Q Which of the following, if any, motivated you to visit the island of _____?

IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - U.S. EAST



1ST TIME VS REPEAT VISITORS - U.S. EAST

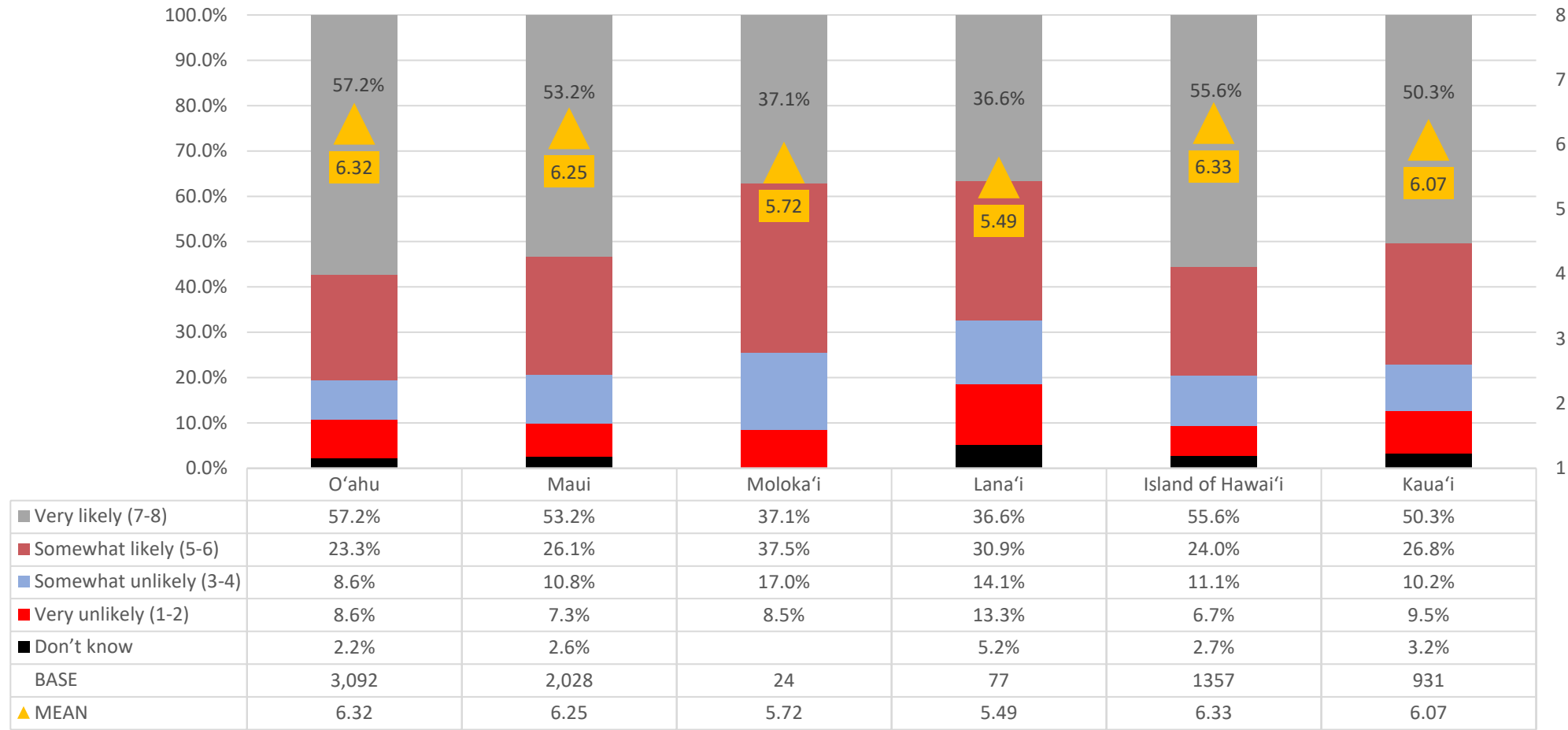


TRAVEL PARTY MEMBERS - U.S. EAST

	2016	2017	2018	2019	2020	2021
Spouse	62.9%	60.9%	61.0%	62.0%	48.1%	56.0%
Other adult family	25.5%	24.6%	26.5%	27.6%	20.3%	27.3%
Child under 18	18.1%	15.6%	19.5%	18.9%	14.9%	20.9%
Friends/ associates	17.6%	14.9%	17.5%	16.6%	13.9%	17.4%
Alone	11.5%	12.3%	10.3%	9.9%	22.2%	10.2%
Girlfriend/ boyfriend	5.7%	6.5%	6.6%	6.2%	7.6%	8.1%
Same sex partner	.8%	1.2%	1.2%	1.2%	1.0%	1.0%

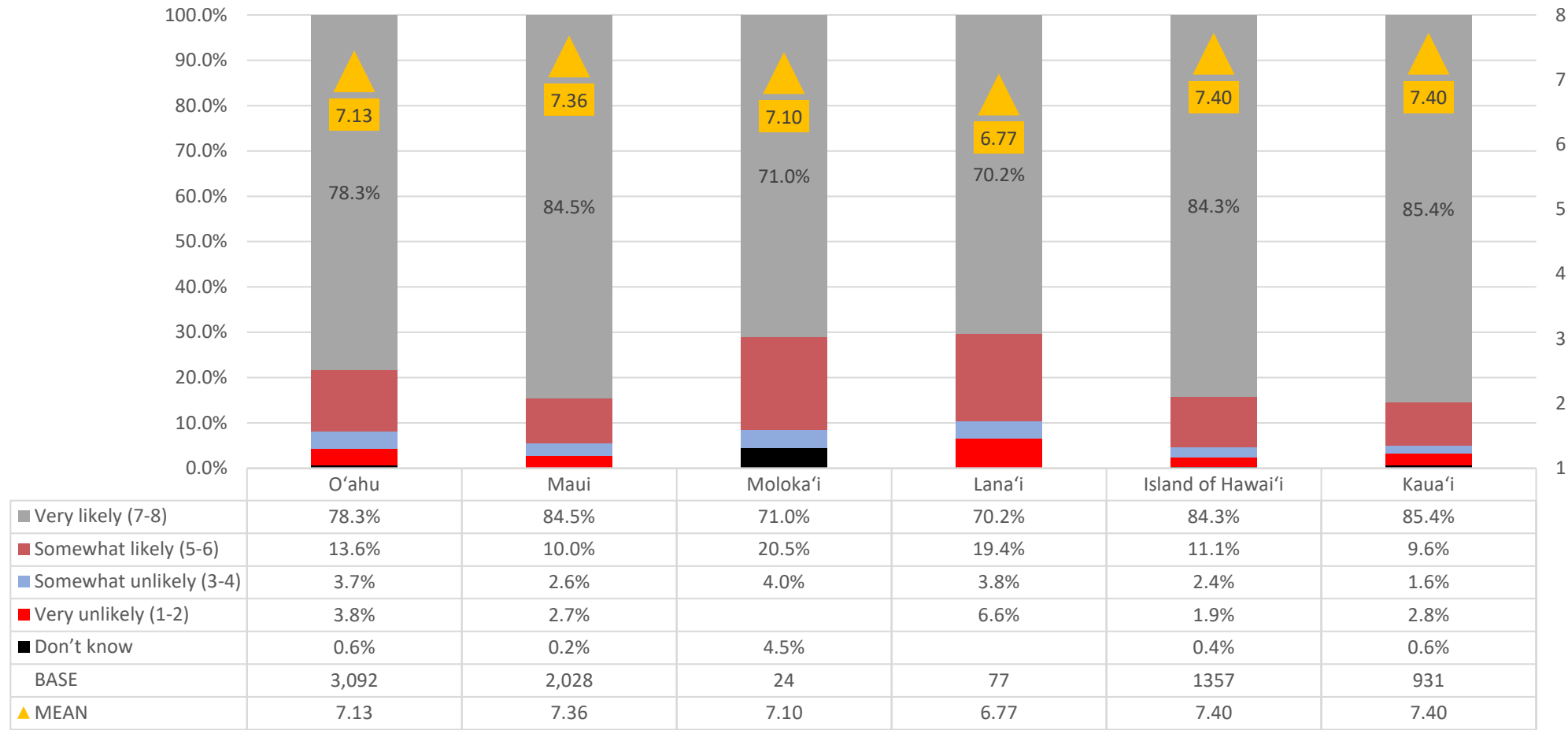
LIKELIHOOD OF RETURN VISIT - U.S. EAST

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



BRAND/ DESTINATION ADVOCACY - U.S. EAST

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



ACTIVITIES - SIGHTSEEING- U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	94.5%	96.7%	100.0%	95.0%	97.2%	97.0%
On own (self guided)	76.7%	84.6%	65.6%	45.4%	87.8%	86.1%
Helicopter/ airplane	2.8%	6.2%	12.9%	2.7%	6.5%	16.4%
Boat/ submarine/ whale watching	23.8%	42.3%	21.4%	49.9%	32.9%	39.6%
Visit towns/communities	42.9%	57.5%	44.7%	34.1%	57.4%	60.0%
Limo/ van/ bus tour	15.8%	9.8%	4.5%	13.0%	10.7%	2.9%
Scenic views/ natural landmark	63.2%	67.6%	53.1%	54.5%	73.0%	74.1%
Movie/ TV/ film location	11.0%	0.8%	0.0%	0.0%	1.0%	5.5%

ACTIVITIES - SIGHTSEEING- U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	97.4%	96.5%	96.6%	93.0%	96.4%
On own (self guided)	82.0%	81.8%	81.1%	81.3%	83.2%
Helicopter/ airplane	13.2%	12.1%	11.4%	3.9%	6.7%
Boat/ submarine/ whale	33.2%	31.1%	31.7%	26.0%	35.4%
Visit towns	37.4%	57.0%	54.7%	47.9%	53.8%
Limo/ van/ bus tour	19.9%	16.4%	16.9%	7.5%	12.5%
Scenic views/ natural landmark	77.7%	69.9%	67.2%	60.7%	68.9%
Movie/ TV/ film location	8.3%	7.0%	6.0%	5.1%	6.2%

ACTIVITIES - RECREATION - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	95.8%	98.4%	79.0%	93.6%	97.6%	97.7%
Beach/ sunbathing	86.9%	91.6%	66.5%	79.2%	85.9%	85.0%
Bodyboard	7.4%	8.9%	0.0%	2.5%	10.6%	8.8%
Stand Up Paddleboard	7.3%	5.7%	0.0%	0.0%	5.8%	4.1%
Surfing	10.3%	7.9%	0.0%	0.0%	4.5%	8.3%
Canoeing/ kayak	7.2%	6.1%	4.5%	0.0%	8.1%	13.6%
Swim ocean	67.1%	75.9%	41.1%	60.1%	69.2%	66.2%
Snorkel	36.2%	56.4%	21.0%	53.8%	57.5%	45.9%
Freediving	1.4%	1.9%	0.0%	1.3%	1.9%	0.8%
Windsurf/ Kitesurf	0.2%	0.3%	0.0%	0.0%	0.2%	0.0%
Jet ski/ Parasail	3.2%	2.8%	0.0%	0.0%	1.7%	0.0%
Scuba	2.4%	4.0%	12.9%	1.3%	4.6%	2.9%
Fishing	2.1%	2.9%	0.0%	6.7%	5.1%	3.7%
Golf	3.5%	10.6%	0.0%	12.9%	7.2%	10.4%

ACTIVITIES - RECREATION - U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	96.0%	96.2%	96.3%	92.9%	97.7%
Beach/ sunbathing	84.8%	83.8%	83.0%	81.5%	89.7%
Bodyboard	13.8%	11.3%	10.4%	8.7%	9.2%
Stand up Paddle Boarding	*	*	*	6.6%	6.6%
Surfing	7.8%	6.5%	6.3%	8.5%	9.0%
Canoeing/ kayak	9.1%	7.6%	7.4%	7.3%	8.5%
Swim ocean	NA	65.1%	65.4%	62.3%	72.1%
Snorkel	NA	42.9%	43.4%	39.8%	49.5%
Freediving	NA	NA	NA	1.8%	1.7%
Windsurf/ Kitesurf	0.4%	0.3%	0.3%	0.4%	0.2%
Jet ski/ Parasail	3.0%	1.8%	1.8%	1.5%	2.6%
Scuba	4.0%	3.2%	3.4%	3.8%	3.5%
Fishing	2.9%	3.1%	3.5%	3.6%	3.4%
Golf	6.7%	6.7%	6.4%	7.4%	7.5%

* Combined with bodyboarding

ACTIVITIES - RECREATION - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	95.8%	98.4%	79.0%	93.6%	97.6%	97.7%
Run/ Jog/ Fitness walk	28.4%	33.1%	12.5%	24.7%	28.3%	35.7%
Spa	7.6%	12.1%	4.0%	29.2%	7.5%	6.6%
Hiking	49.8%	51.8%	33.0%	51.8%	63.3%	58.6%
Backpack/Camping	1.2%	1.9%	0.0%	0.0%	2.8%	3.4%
Agritourism	13.5%	8.5%	8.5%	2.5%	18.8%	9.5%
Sport event/ tournament	0.6%	0.4%	0.0%	0.0%	0.6%	0.4%
Park/ botanical garden	39.3%	35.5%	12.5%	16.1%	48.5%	37.9%
Waterpark	1.8%	0.3%	0.0%	0.0%	1.4%	0.0%
Mountain tube/ waterfall rappel	0.7%	0.7%	0.0%	0.0%	0.4%	7.2%
Zip lining	4.2%	6.1%	0.0%	2.7%	3.1%	3.8%
Skydiving	1.0%	0.2%	0.0%	0.0%	0.4%	0.8%
All terrain vehicle (ATV)	6.3%	3.0%	0.0%	5.3%	3.0%	6.9%
Horseback riding	2.7%	1.6%	0.0%	10.5%	3.2%	2.5%

ACTIVITIES - RECREATION - U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	96.0%	96.2%	96.3%	92.9%	97.7%
Run/ Jog/ Fitness walk	36.3%	28.5%	24.5%	35.5%	31.9%
Spa	11.6%	9.9%	10.0%	6.9%	9.8%
Hiking	33.8%	36.0%	51.3%	49.1%	56.0%
Backpack/Camp	*	*	2.3%	2.6%	2.1%
Agritourism	13.1%	17.1%	16.1%	10.8%	13.5%
Sport event/ tournament	2.3%	2.2%	2.9%	1.0%	0.6%
Park/ botanical garden	47.6%	45.3%	43.0%	34.6%	41.8%
Waterpark	NA	1.2%	1.3%	1.1%	1.2%
Mountain tube/ waterfall rappel	NA	1.7%	2.1%	1.3%	1.6%
Zip lining	NA	5.9%	5.6%	3.0%	4.9%
Skydiving	NA	0.5%	0.6%	0.4%	0.7%
All terrain vehicle (ATV)	NA	3.8%	3.5%	4.0%	5.4%
Horseback riding	NA	2.3%	2.5%	2.1%	2.8%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.6%	99.2%	78.6%	87.4%	99.3%	98.6%
Lunch/ sunset/ dinner/ evening cruise	23.6%	30.0%	4.0%	34.6%	20.8%	27.0%
Live music/ stage show	25.4%	29.7%	29.5%	11.7%	26.0%	20.1%
Nightclub/ dancing/ bar/ karaoke	6.8%	5.5%	4.0%	0.0%	5.9%	3.8%
Fine dining	50.4%	62.5%	16.1%	53.8%	47.3%	53.2%
Family restaurant	55.8%	55.1%	36.6%	22.1%	59.5%	55.8%
Fast food	49.3%	30.8%	20.5%	3.9%	33.1%	30.0%
Food truck	47.4%	47.1%	29.0%	3.9%	24.5%	41.8%
Café/ coffee house	45.6%	46.2%	12.5%	26.4%	52.8%	46.2%
Ethnic dining	33.2%	27.2%	20.1%	5.2%	29.4%	24.3%
Prepared own meal	34.6%	51.0%	45.5%	11.6%	56.1%	55.9%

ACTIVITIES - ENTERTAINMENT & DINING - U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	97.9%	97.7%	97.3%	96.9%	99.0%
Lunch/ sunset/ dinner/ evening cruise	33.2%	26.1%	26.2%	20.7%	27.2%
Live music/ stage show	39.6%	37.3%	35.9%	17.2%	28.4%
Nightclub/ dancing/ bar/ karaoke	10.6%	10.0%	9.1%	6.0%	6.3%
Fine dining	58.2%	55.7%	53.8%	44.0%	55.2%
Family restaurant	65.8%	58.3%	58.4%	52.7%	57.9%
Fast food	34.9%	35.7%	35.2%	39.8%	40.5%
Food truck	NA	31.2%	31.4%	37.3%	44.3%
Café/ coffee house	44.8%	43.9%	43.1%	40.3%	48.6%
Ethnic dining	36.1%	34.0%	34.3%	27.0%	31.2%
Prepared own meal	40.6%	43.6%	42.2%	55.9%	48.2%

ACTIVITIES - SHOPPING - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	95.8%	96.8%	70.5%	56.0%	96.5%	95.7%
Mall/ department store	50.3%	36.9%	4.0%	0.0%	22.4%	20.0%
Designer boutique	17.1%	21.4%	0.0%	5.2%	13.8%	17.1%
Hotel/ resort store	40.1%	36.3%	8.0%	26.4%	32.7%	27.3%
Swap meet/ flea market	18.6%	11.9%	4.0%	3.9%	12.2%	6.1%
Discount/ outlet store	15.0%	15.7%	0.0%	1.4%	9.9%	11.1%
Supermarket	48.9%	70.1%	54.0%	13.0%	68.5%	71.4%
Farmer's market	19.5%	27.0%	25.4%	3.9%	51.0%	38.4%
Convenience store	58.3%	49.7%	17.0%	8.9%	44.7%	43.7%
Duty free store	4.9%	1.9%	0.0%	0.0%	1.5%	1.3%
Local shop/ artisan	54.9%	71.9%	37.5%	32.4%	68.0%	73.3%

ACTIVITIES - SHOPPING - U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	95.9%	95.9%	95.4%	91.9%	96.7%
Mall/ department store	44.3%	43.1%	40.4%	36.5%	40.4%
Designer boutique	23.1%	18.6%	18.1%	15.3%	18.9%
Hotel/ resort store	39.5%	39.2%	37.9%	25.5%	37.7%
Swap meet/ flea market	18.2%	15.6%	14.8%	11.8%	15.1%
Discount/ outlet store	19.1%	17.8%	16.2%	14.2%	14.6%
Supermarket	51.4%	59.2%	58.6%	62.8%	63.7%
Farmer's market	28.2%	31.2%	30.3%	26.9%	31.8%
Convenience store	44.6%	48.1%	48.0%	45.4%	53.3%
Duty free store	4.1%	4.6%	4.4%	2.8%	3.3%
Local shop/ artisan	67.6%	67.0%	66.9%	56.7%	66.0%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	75.1%	65.3%	54.5%	50.8%	71.5%	57.8%
Historic military site	50.2%	4.9%	4.5%	2.5%	13.0%	6.9%
Historic Hawaiian site	33.2%	25.3%	42.0%	20.7%	45.4%	30.7%
Other historical site	12.8%	8.9%	21.4%	5.3%	16.1%	11.8%
Art museums	2.9%	2.3%	0.0%	1.4%	2.0%	0.8%
Art gallery and exhibition	3.9%	14.5%	0.0%	14.1%	8.9%	9.7%
Luau/ Polynesian show/ hula show	30.7%	35.0%	8.0%	15.9%	25.3%	15.6%
Lesson ex. ukulele, hula, canoe, lei making	4.5%	3.9%	4.5%	5.4%	4.1%	2.5%
Play/ concert/ theatre	1.5%	1.4%	0.0%	1.3%	1.0%	1.0%
Art/ craft fair	4.0%	9.2%	4.0%	3.9%	8.7%	10.1%
Festival event	2.1%	1.4%	0.0%	1.3%	1.7%	2.9%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	81.3%	77.1%	75.6%	57.8%	71.5%
Historic military site	42.9%	28.3%	27.2%	23.4%	27.4%
Historic Hawaiian site	*	*	*	*	34.3%
Other historical site	34.7%	31.4%	31.1%	23.9%	13.1%
Museum/ art gallery	21.9%	18.3%	17.2%	11.3%	NA
Art museum	*	*	*	*	2.5%
Art gallery	*	*	*	*	9.1%
Luau/ Polynesian show/ hula show	47.6%	42.0%	41.3%	16.1%	31.7%
Lesson ex. ukulele, hula, canoe, lei making	6.3%	8.5%	8.1%	3.8%	4.4%
Play/ concert/ theatre	4.7%	5.1%	4.3%	1.8%	1.4%
Art/ craft fair	12.8%	13.5%	11.9%	7.0%	7.6%
Festival event	9.8%	5.3%	5.2%	5.0%	2.2%

ACTIVITIES - TRANSPORTATION- U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAII'	KAUA'I
TOTAL	88.3%	95.8%	75.0%	71.6%	93.3%	94.8%
Airport shuttle	17.1%	9.5%	4.0%	31.8%	14.4%	16.1%
Trolley	2.2%	2.8%	0.0%	1.3%	1.3%	0.1%
Public bus	9.0%	2.3%	4.0%	0.0%	1.3%	2.6%
Tour bus/ tour van	14.7%	7.6%	4.5%	13.1%	9.3%	4.4%
Taxi/ limo	15.8%	8.9%	0.0%	19.6%	8.5%	13.1%
Rental car	59.3%	85.8%	62.1%	27.4%	86.0%	85.7%
Ride share	29.4%	11.6%	4.5%	1.3%	9.3%	8.0%
Bicycle rental	4.7%	2.4%	0.0%	1.3%	1.8%	3.8%

ACTIVITIES - TRANSPORTATION- U.S. EAST

	2017	2018	2019	2020	2021
TOTAL	95.0%	92.4%	93.2%	81.2%	91.9%
Airport shuttle	26.3%	20.2%	17.6%	10.2%	15.6%
Trolley	4.5%	3.4%	3.7%	1.7%	2.1%
Public bus	7.5%	5.7%	4.8%	3.4%	5.4%
Tour bus/ tour van	20.6%	18.0%	18.6%	7.8%	11.2%
Taxi/ limo	20.1%	12.4%	10.0%	7.1%	13.1%
Rental car	75.3%	74.2%	74.4%	66.1%	75.3%
Ride share	NA	14.9%	18.3%	16.5%	19.4%
Bicycle rental	NA	2.2%	2.3%	2.5%	3.7%

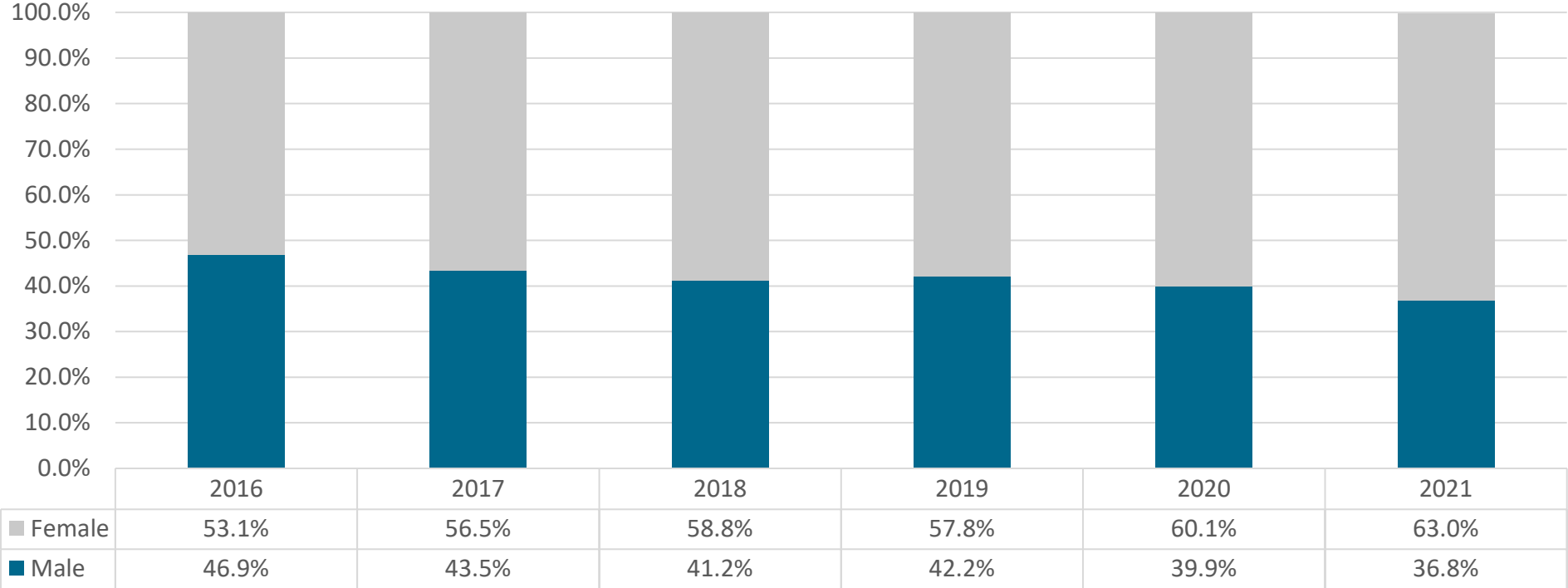
ACTIVITIES - OTHER - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LANA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	34.9%	17.1%	28.6%	3.9%	26.2%	18.5%
Visit friends/ family	34.2%	16.3%	24.6%	2.7%	25.2%	17.5%
Volunteer non profit	1.3%	1.2%	4.0%	1.3%	1.4%	1.9%

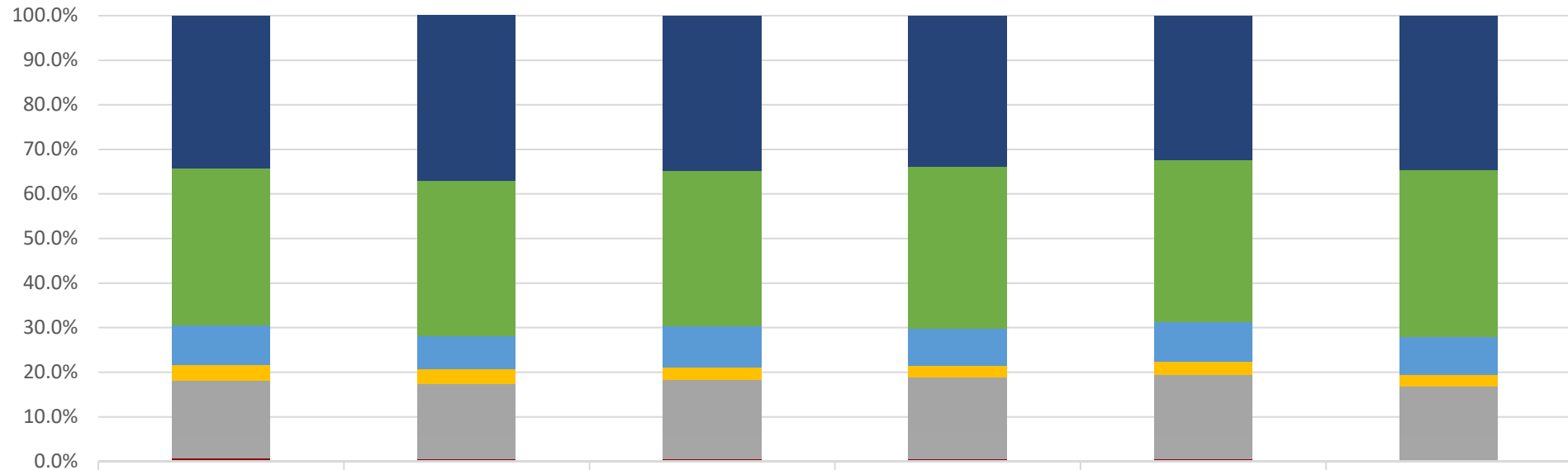
ACTIVITIES - OTHER - U.S. EAST

	2018	2019	2020	2021
TOTAL	26.4%	25.2%	39.8%	28.2%
Visit friends/ family	25.6%	24.4%	39.2%	27.3%
Volunteer non profit	1.3%	1.1%	1.1%	1.5%

VISITOR PROFILE - GENDER - U.S. EAST

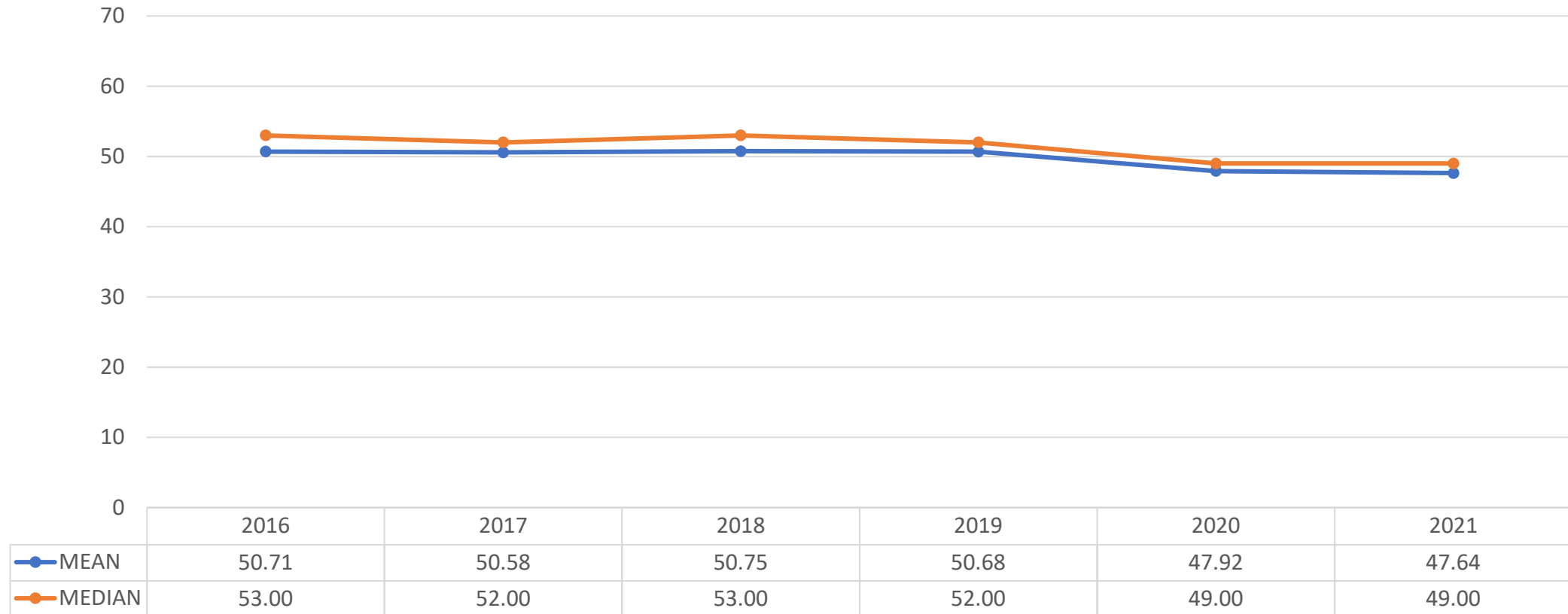


VISITOR PROFILE - EDUCATION - U.S. EAST

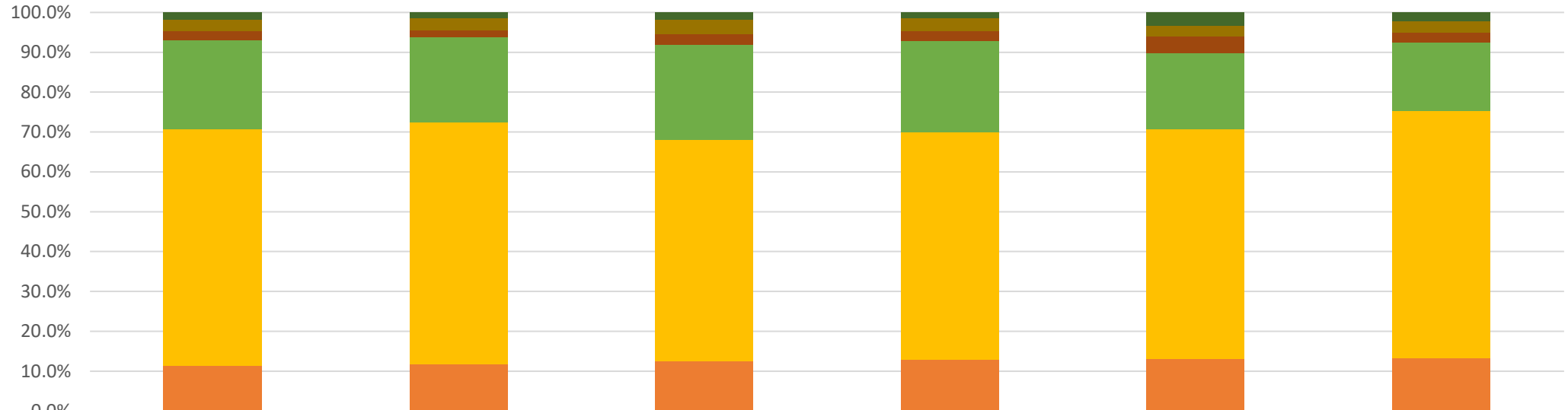


	2016	2017	2018	2019	2020	2021
Post-Graduate	34.2%	37.1%	34.8%	33.8%	32.4%	34.6%
College Grad	35.3%	34.8%	34.9%	36.4%	36.4%	37.5%
Associate Degree	8.8%	7.6%	9.2%	8.3%	8.9%	8.5%
Vocational/ Tech	3.6%	3.2%	2.8%	2.7%	3.0%	2.5%
Some College	12.7%	11.6%	12.2%	12.4%	13.4%	11.6%
H.S. Grad	4.8%	5.3%	5.6%	5.9%	5.5%	5.1%
Some / No H.S.	0.6%	0.5%	0.5%	0.5%	0.5%	0.2%

VISITOR PROFILE - AGE - U.S. EAST

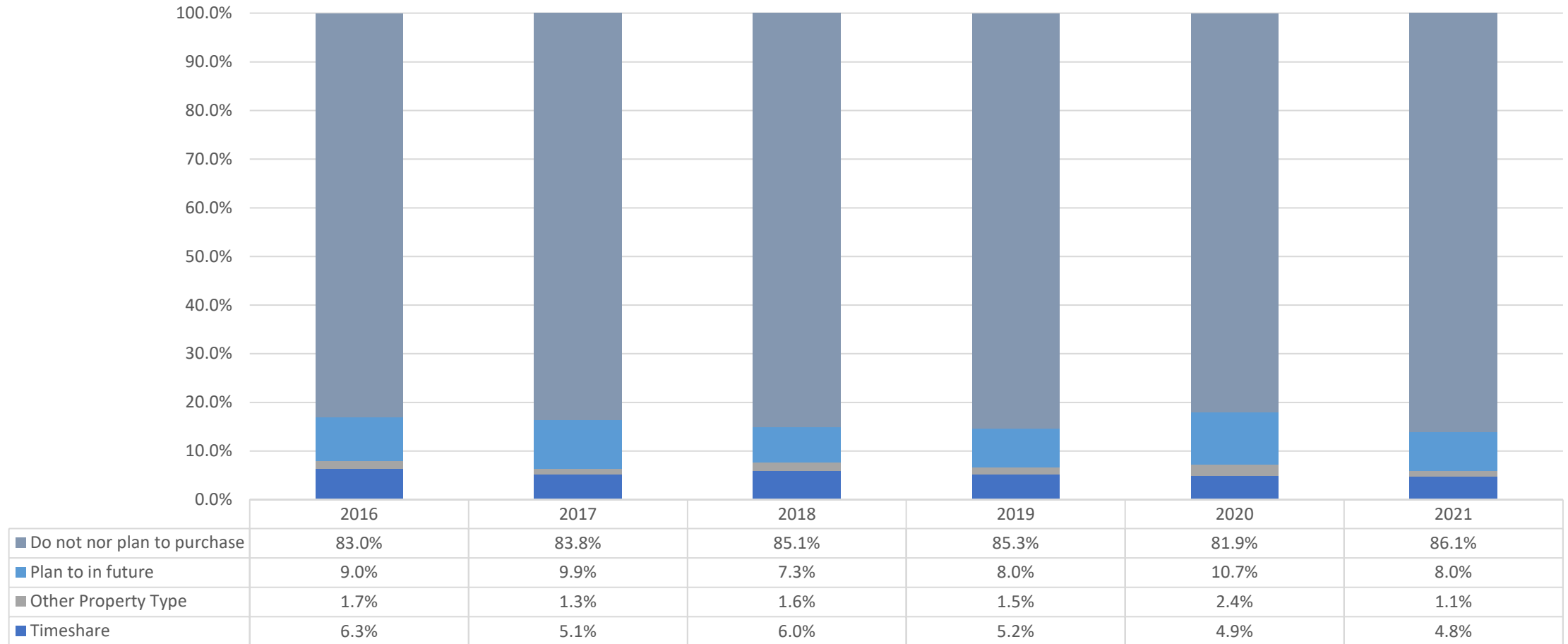


VISITOR PROFILE - EMPLOYMENT STATUS - U.S. EAST



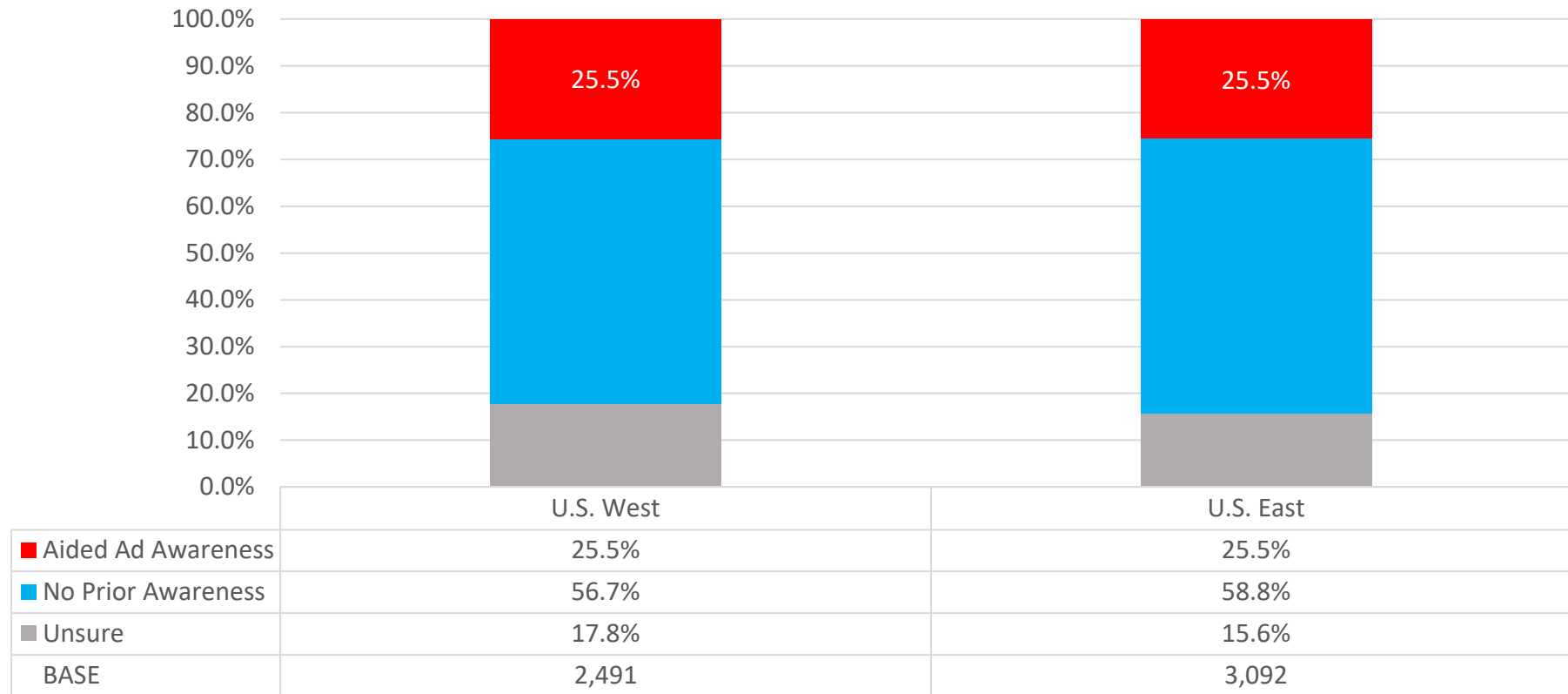
	2016	2017	2018	2019	2020	2021
Other	1.8%	1.4%	1.8%	1.5%	3.4%	2.1%
Homemaker	3.0%	3.1%	3.6%	3.1%	2.7%	2.8%
Student	2.1%	1.9%	2.5%	2.5%	4.2%	2.5%
Retired	22.5%	21.3%	24.0%	23.0%	19.1%	17.1%
Employed	59.2%	60.5%	55.5%	56.9%	57.5%	62.1%
Self-employed	11.4%	11.9%	12.5%	13.0%	13.2%	13.3%

VISITOR PROFILE - HAWAI'I PROPERTY OWNER - U.S. EAST



Section – O'ahu

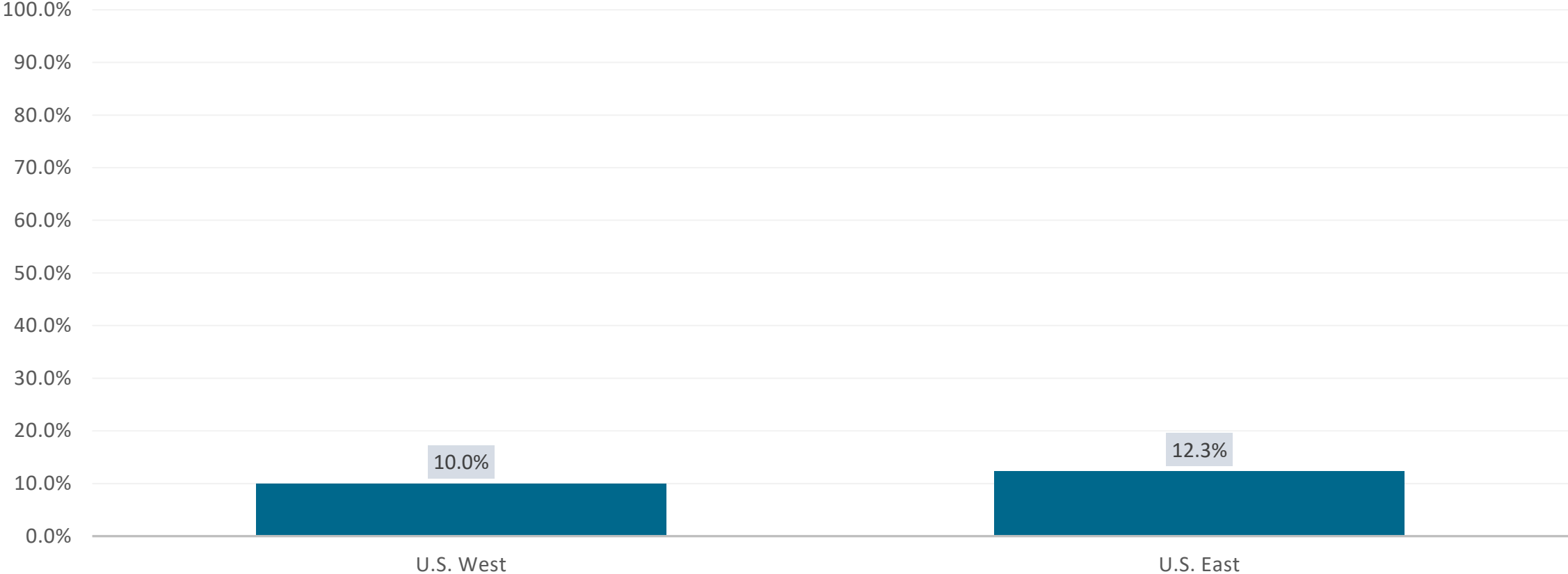
AIDED ADVERTISING AWARENESS - O'AHU



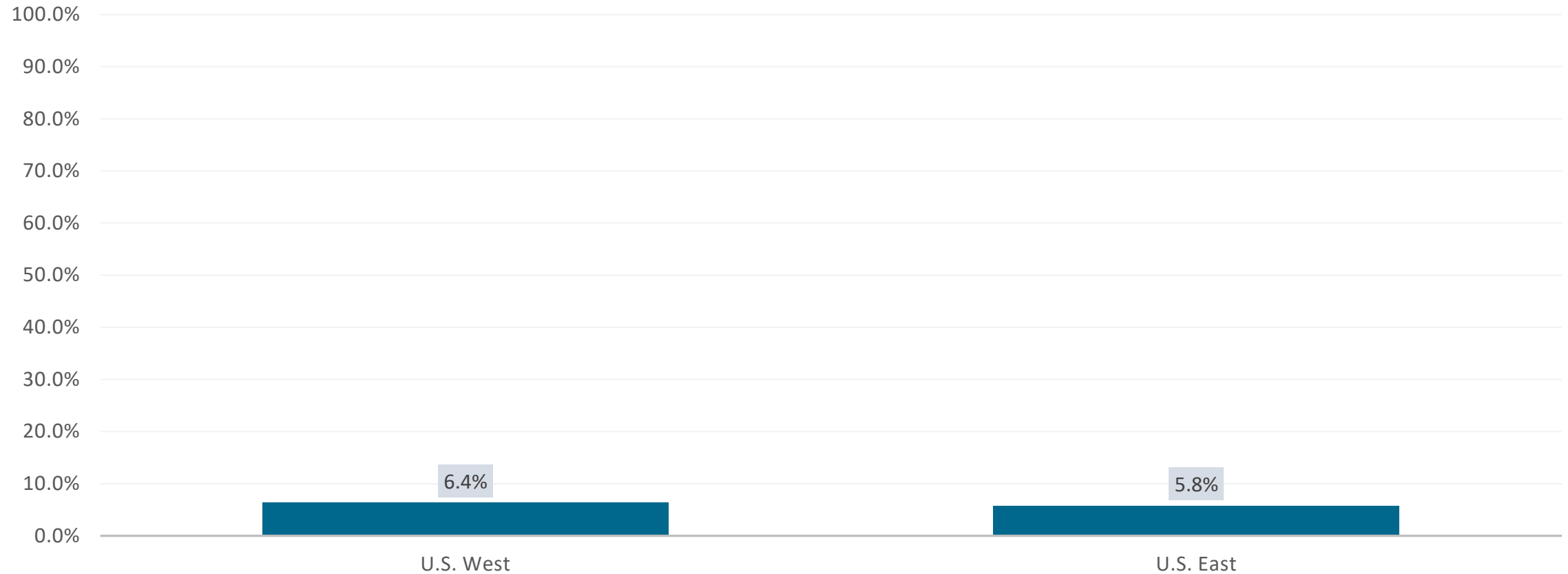
AIDED ADVERTISING AWARENESS - O'AHU

- **Islands visited:** Visitors from both U.S. West and U.S. East who stayed on multiple islands were more likely to have been exposed to advertising for O'ahu than those whose trip was limited to just O'ahu.
- **Age:** Aided ad awareness for O'ahu was highest amongst seniors in both U.S. visitor markets.
- **Travel party size:** Visitors from U.S. East in larger travel parties of three or more individuals were the most likely to have been exposed to marketing for O'ahu than those here in smaller groups.

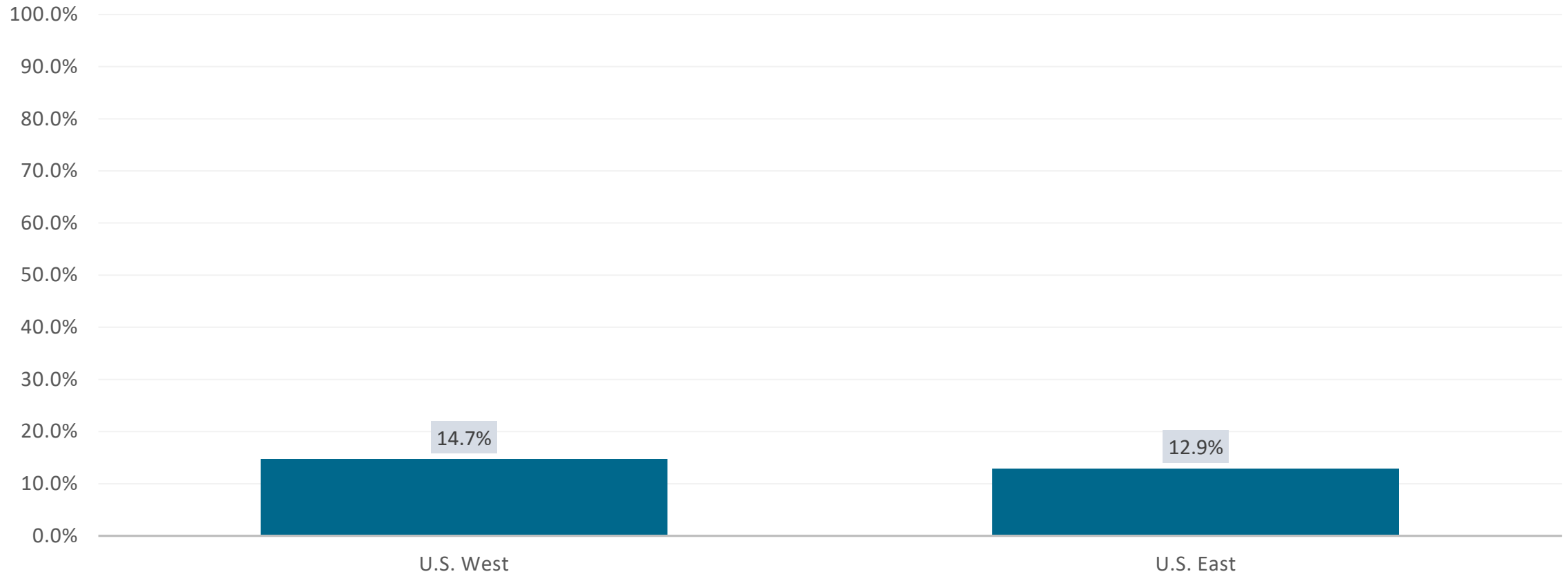
IMPACT OF LOCATION FILMING - O'AHU



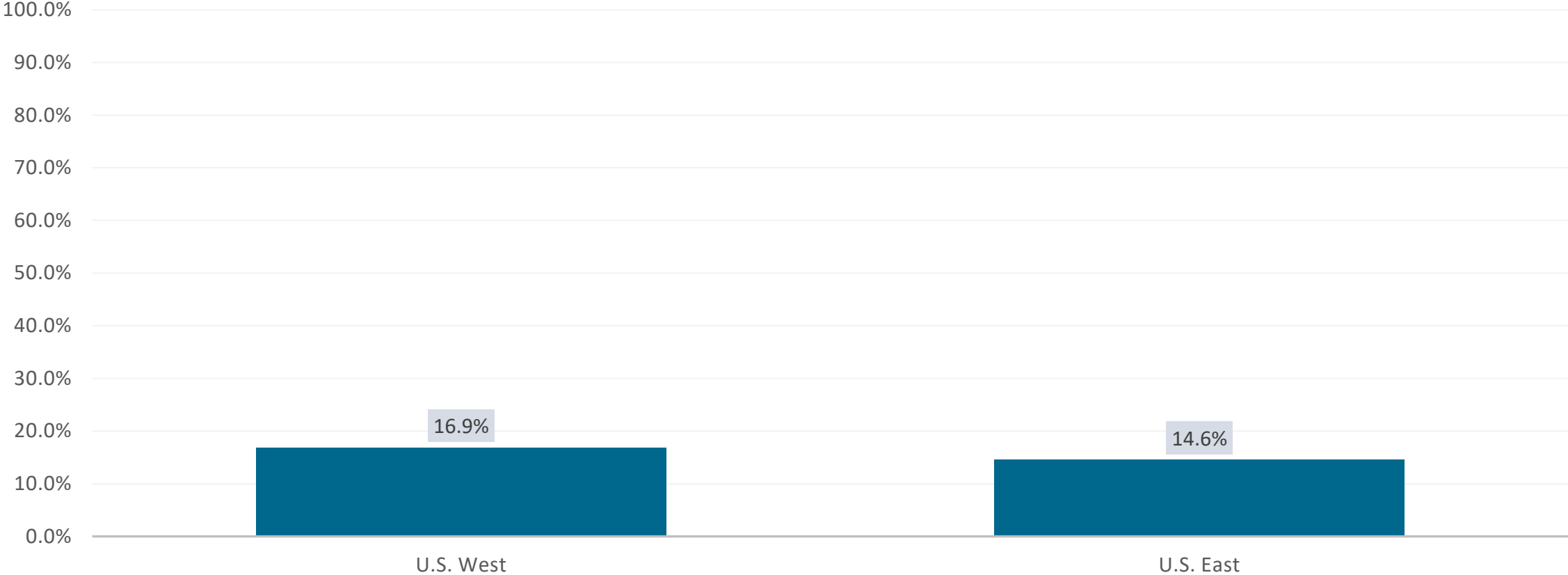
IMPACT OF HAWAIIAN MUSIC - O'AHU



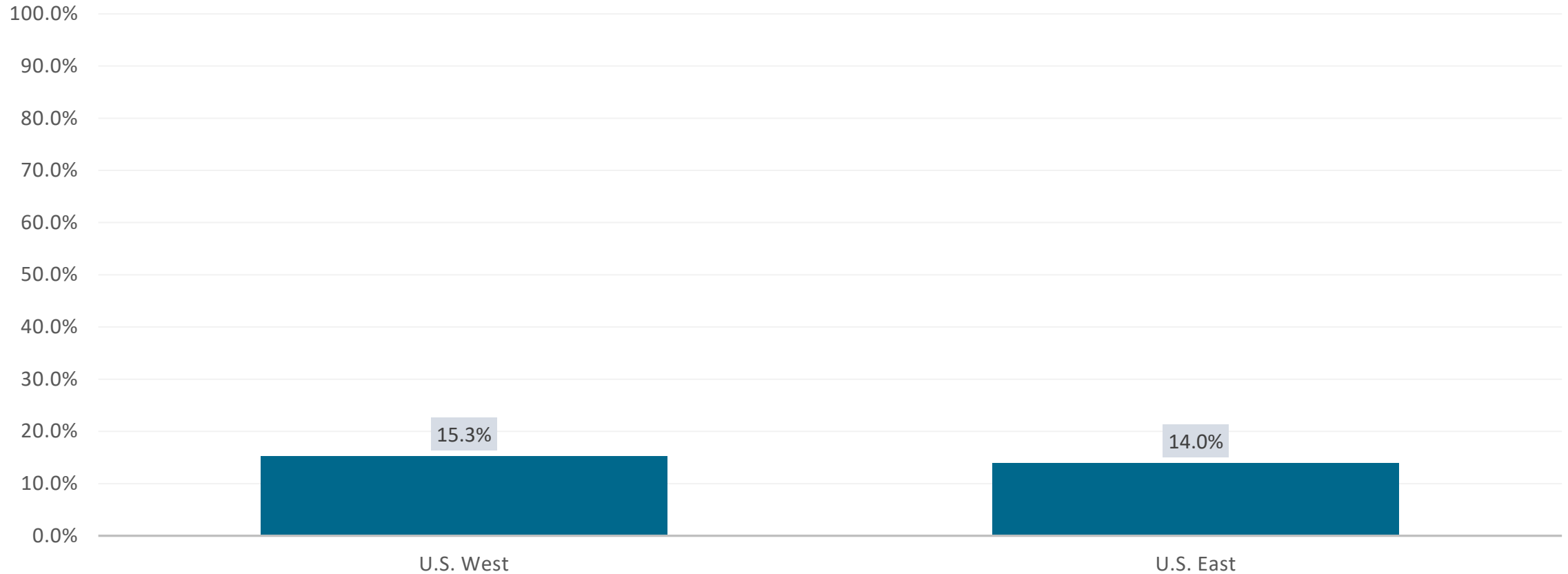
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - O'AHU



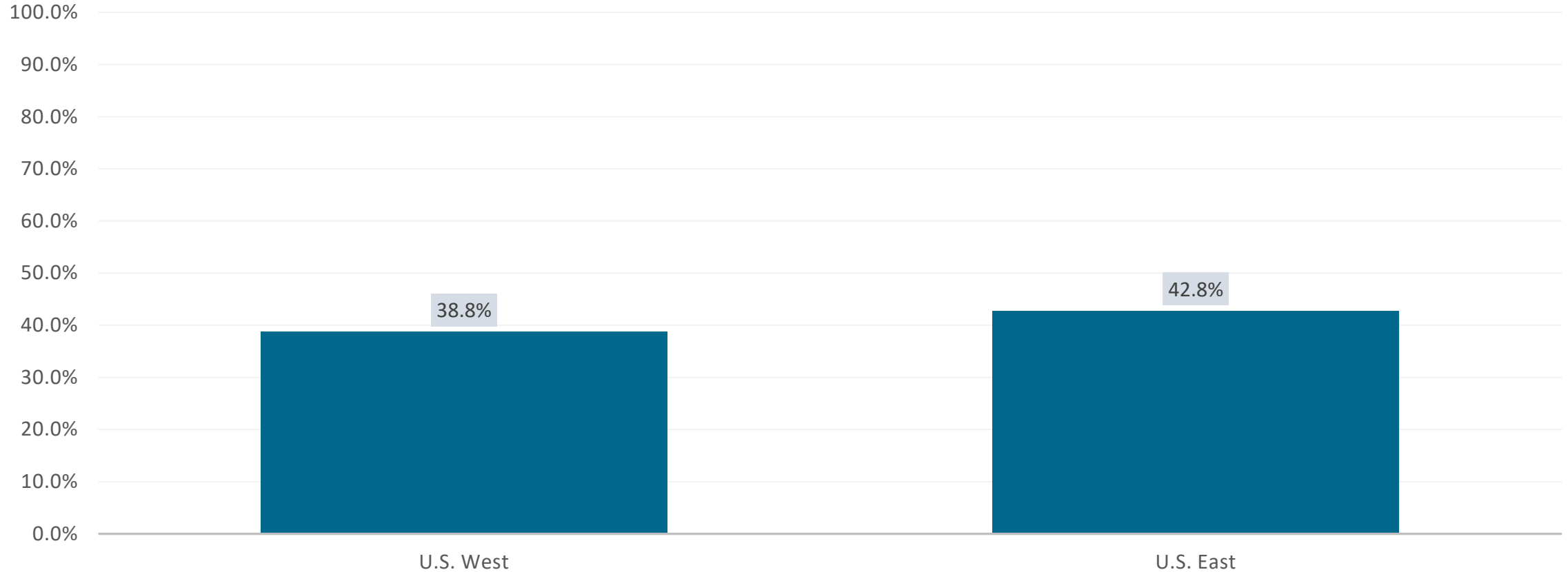
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - O'AHU



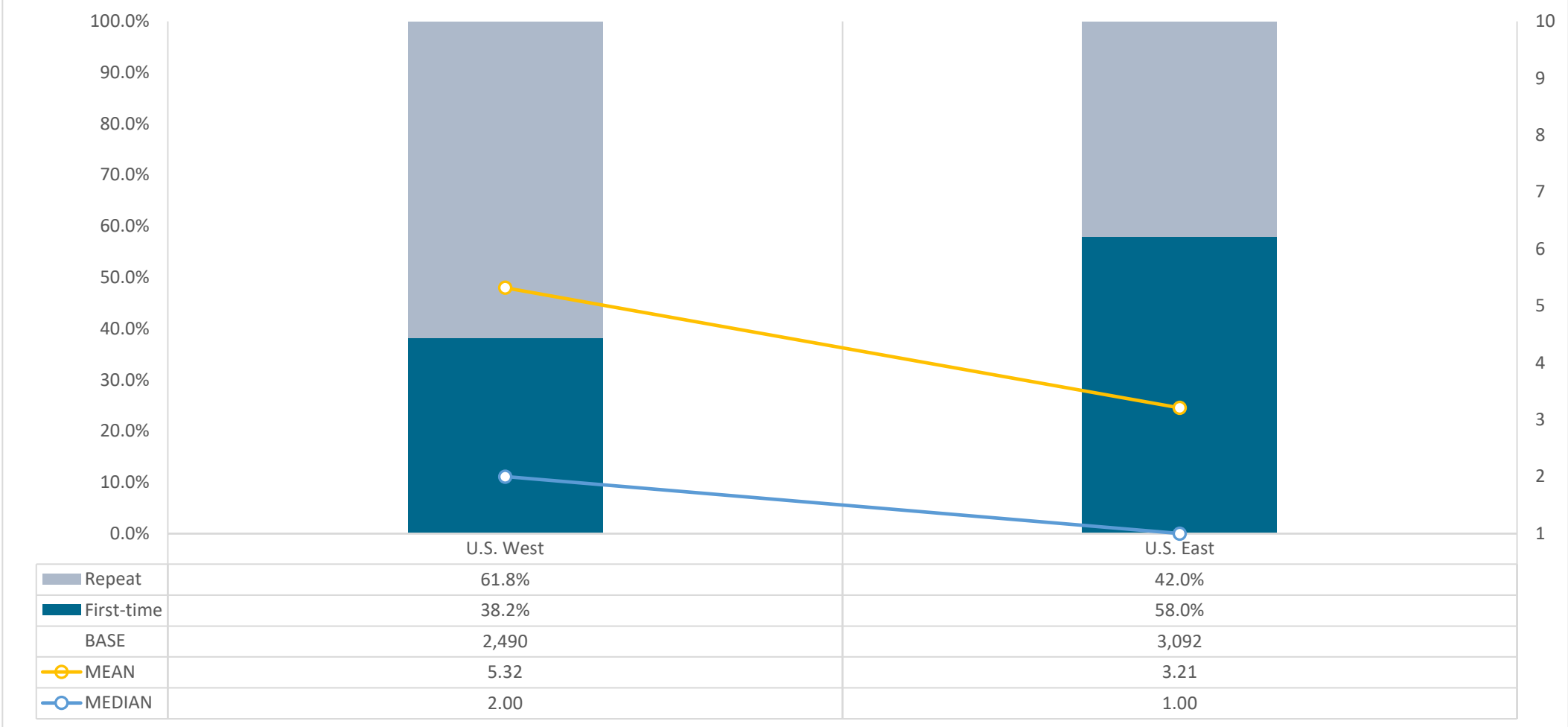
IMPACT OF HAWAIIAN CULTURAL EVENTS - O'AHU



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - O'AHU



1st TIME VS REPEAT VISITOR - O'AHU



1st TIME VS REPEAT VISITOR - O'AHU

- **Gender:** Male visitors from U.S. East have been to O'ahu more often compared to females from this visitor market.
- **Age:** The likelihood of being a repeat visitor to O'ahu increased with age in both U.S. visitor markets.
- **Education:** Amongst visitors from U.S. West, those with a college degree have been to O'ahu more often than those without a college degree.
- **Household income:** The number of trips to O'ahu increased as respondents become more affluent. This trend existed in both U.S. visitor markets.
- **Travel party size:** Amongst visitors from U.S. West, those who traveled to O'ahu alone have visited the most often.

ACCOMMODATIONS - O'AHU

	U.S. West	U.S. East
Hotel/ resort/ villa		
Stayed with friends or relatives	13.2%	15.3%
Vacation rental (includes AirBnB, VRBO, etc.)	13.2%	11.0%
Condominium/ apartment	8.8%	6.9%
Timeshare Unit	8.3%	7.0%
Military housing/ accommodations	2.1%	3.3%
Private Room in Private Home	2.4%	2.5%
Rental House	1.9%	1.2%
Day trip/ Did not stay overnight	1.3%	1.8%
Hostel	0.6%	1.3%
Own property/ second home	1.1%	0.3%
Shared Room/ Space in Private Home		

ACCOMMODATIONS - O'AHU

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	46.8%	43.5%
■ Residential Neighborhood	53.2%	56.5%
BASE	438	472

ACCOMMODATIONS - O'AHU

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Location	36.1%	36.4%
Price/ value/ best deal	25.5%	21.7%
Owned by self, friend or relative	13.6%	19.1%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	11.6%	10.4%
Ability to have travel party members stay together	5.9%	5.1%
Availability	2.6%	4.0%
Recommendation from friends or family	3.3%	2.1%
Other (please specify)	0.9%	0.6%
No choice/ part of package	0.2%	0.6%
Previous Experience	0.2%	0.0%

STRENGTHS/ POSITIVE ASPECTS - O'AHU

	U.S. West	U.S. East
Beach/ ocean	22.4%	15.8%
Variety of activities/ attractions/ many choices	17.6%	20.2%
Nature/ natural beauty/ scenery	14.0%	18.4%
Feeling of the "Aloha Spirit"	8.5%	8.6%
Friendliness of the local people	6.0%	7.2%
Food/ restaurant variety/ dining options	7.0%	4.7%
Events/ celebrations with friends/ family	5.2%	6.0%
Overall customer service/ hospitality/ the people	3.7%	3.1%
Local culture/ people/ music	2.4%	2.8%
Military historical sites	1.3%	3.1%
Accommodations/ was as promised	1.8%	1.9%
Food/ restaurant/ good service	1.9%	1.0%
Food/ restaurant quality	1.5%	1.0%

STRENGTHS/ POSITIVE ASPECTS - O'AHU

- ***Trips to Hawai'i:*** First-time visitors to O'ahu were more likely to list the variety of activities and attractions as facets of their stay that made it more enjoyable. Repeat visitors were more likely to list the beach and ocean as drivers of trip satisfaction. The island's natural beauty also had more of an impact on first-time visitors to O'ahu.
- ***Age:*** Younger visitors from both U.S. markets were more likely to be positively impacted by O'ahu's natural beauty and also the variety of dining options. Older visitors were more happy to be here on the island spending time with loved ones.
- ***Travel party size:*** Visitors from both U.S. visitor markets who were here in larger travel parties of three or more were the most likely to list the variety of activities and attractions as things that made their stay more enjoyable.
- ***Household income:*** More affluent visitors from U.S. West were the most likely identify the beach and ocean as reasons that drove satisfaction.

AREAS OF OPPORTUNITIES - O'AHU

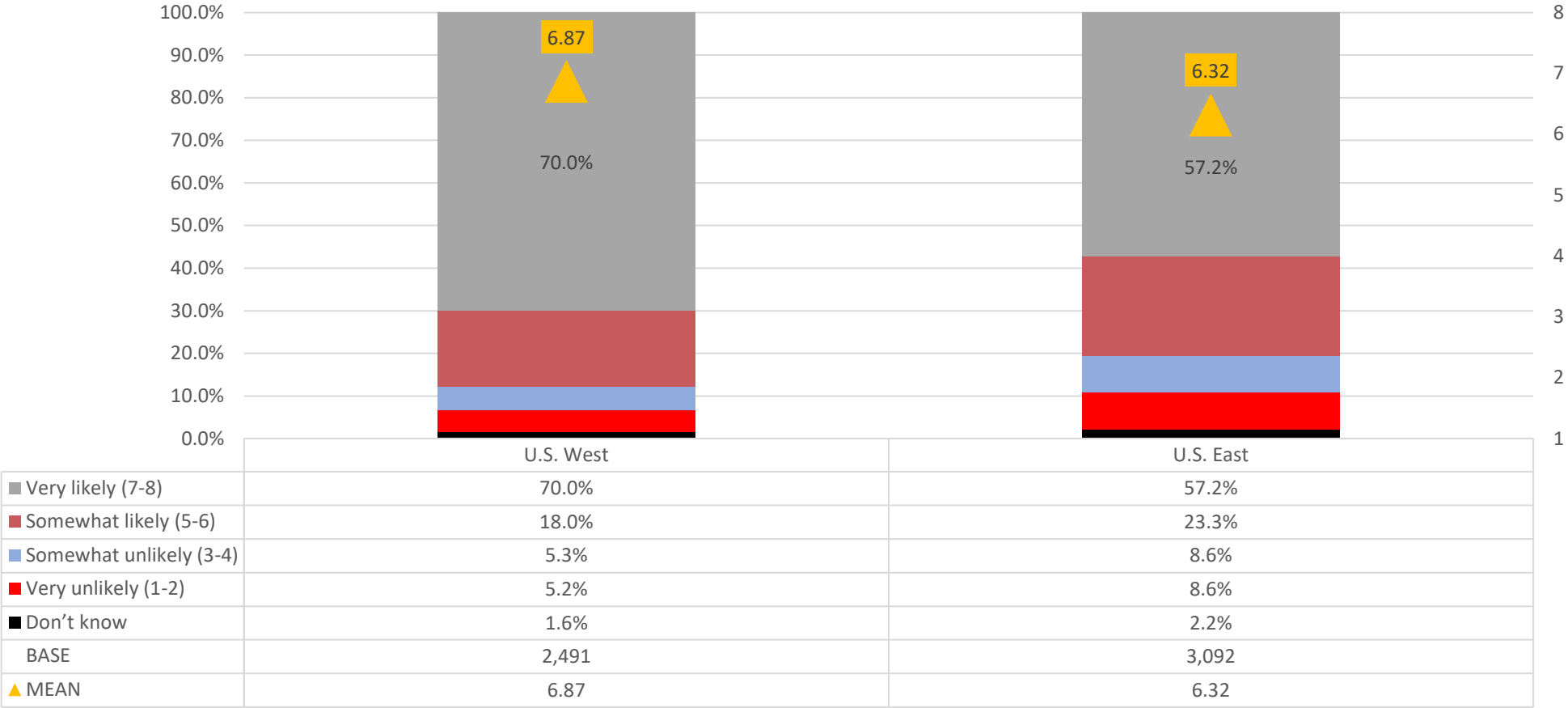
	U.S. West	U.S. East
No negatives/ everything was great	31.8%	34.1%
Traffic (congested/slow)	10.4%	10.6%
Would like to experience more local culture	7.4%	7.8%
Coronavirus / COVID 19 pandemic	5.6%	6.9%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	6.5%	5.0%
Food/ restaurant variety/ dining options	5.6%	6.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	4.7%	3.9%
Concerns about safety	4.5%	4.2%
Driving experience (signage, road surface, traffic violations, bad drivers)	3.9%	3.2%
Variety of activities/ attractions	2.6%	2.6%
Homelessness	2.2%	2.2%

AREAS OF OPPORTUNITIES - O'AHU

- **Travel party size:** Visitors from U.S. West and U.S. East in larger travel parties of three or more individuals were more likely to mention the variety of food options as an area that could be improved upon.
- **Education:** Those without a college degree from both U.S. visitor markets were less likely to identify anything about their stay on O'ahu that could specifically be improved upon.
- **Gender:** Female respondents from both U.S. visitor markets were less likely to identify anything in particular about their stay on O'ahu that could be improved upon compared to male respondents.
- **Household income:** Visitors from U.S. West and U.S. East in the bottom income tier (<\$100K) were less likely to identify things they didn't like about their stay on O'ahu. Comments were more prevalent from more affluent visitors.

LIKELIHOOD OF RETURN VISIT - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

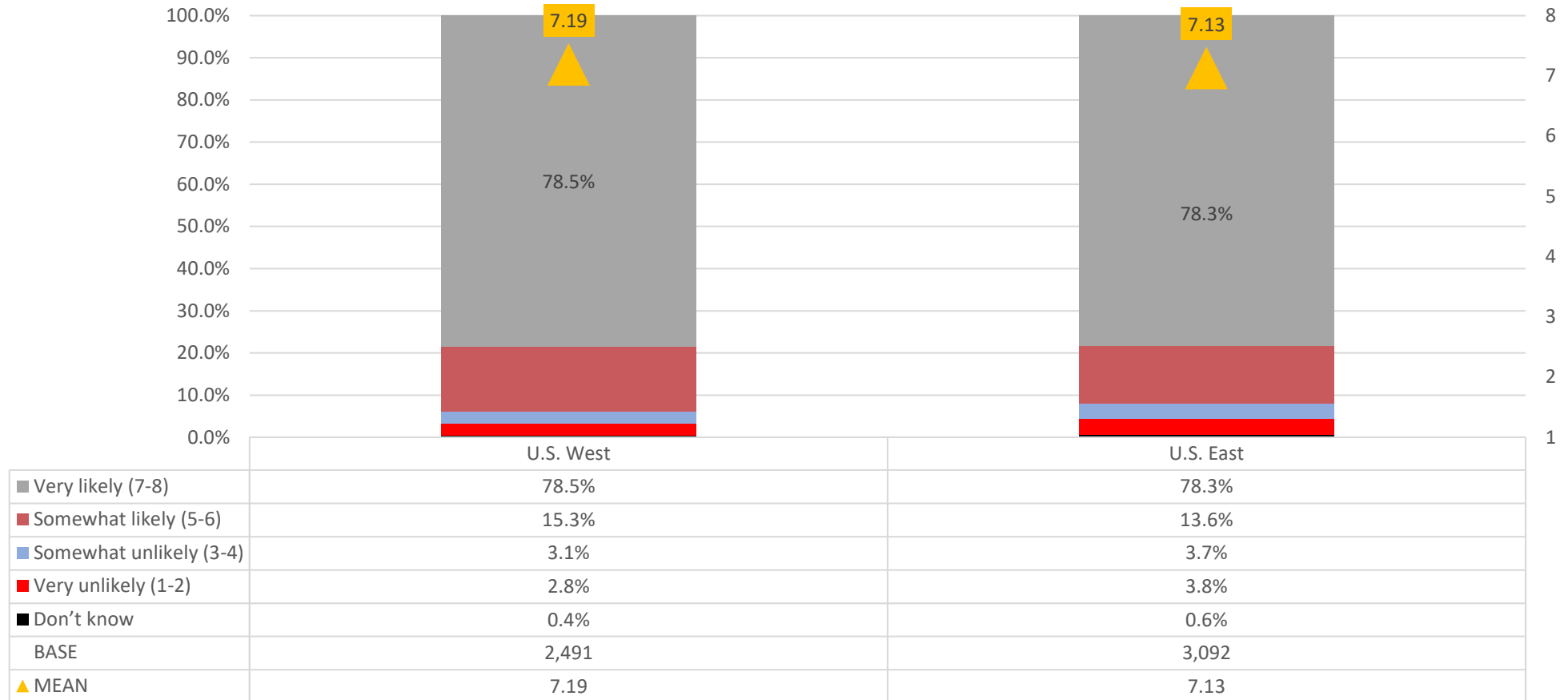
- **Education:** Visitors from U.S. West who did not have a college degree expressed a higher likelihood of returning to O'ahu compared to those with a college degree.
- **Age:** Amongst visitors from U.S. East, younger respondents under the age of 35 appeared to be the most likely to return to O'ahu.
- **Gender:** Female respondents from both U.S. visitor markets gave a higher mean score than their male counterparts.
- **Household income:** Visitors from both U.S. West and U.S. East in the lower income tier (<\$100K) expressed a stronger desire or likelihood of returning to O'ahu compared to more affluent visitors.
- **Islands visited:** Visitors from both U.S. visitor markets who stayed entirely on O'ahu showed a greater likelihood of returning compared to those who visited multiple islands.

REASONS FOR NOT RETURNING - O'AHU

	U.S. West	U.S. East
Want to go someplace new		
Too crowded/ congested/ traffic	29.6%	24.7%
Too expensive/cost	23.4%	31.8%
Too commercial/ overdeveloped	29.6%	22.1%
Not enough value for the price	16.6%	14.3%
No reason to return/ nothing new	14.2%	13.5%
Flight too long	3.0%	17.1%
Unfriendly people/ felt unwelcome	9.1%	8.1%
Coronavirus / COVID 19 pandemic	6.6%	6.3%
Poor service		

BRAND/ DESTINATION ADVOCACY - O'AHU

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



BRAND/ DESTINATION ADVOCACY - O'AHU

- **Islands visited:** Visitors from U.S. West and U.S. East who stayed entirely on O'ahu were more likely to recommend the island compared to those who also visited a Neighbor Island.
- **Age:** Among visitors from U.S. East, younger respondents under the age of 35 were the strongest advocates for the state compared to older visitors.
- **Gender:** Female respondents from both U.S. visitor markets were more likely to recommend O'ahu to others compared to male respondents.
- **Education:** Visitors from U.S. West without a college degree were stronger advocates for the state than visitors with a college degree.
- **Household income:** Less affluent travelers (<\$100K) from both U.S. West and U.S. East were likely to give stronger recommendations to visit O'ahu compared to more affluent travelers.

O'AHU ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	93.7%	94.5%
On own (self guided)	77.9%	76.7%
Helicopter/ airplane	1.9%	2.8%
Boat/ submarine/ whale	19.8%	23.8%
Visit towns	41.4%	42.9%
Limo/ van/ bus tour	10.1%	15.8%
Scenic views/ natural landmark	54.9%	63.2%
Movie/ TV/ film location	8.9%	11.0%

O'AHU ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	87.8%	86.9%
Bodyboard	10.4%	7.4%
Stand up paddle board	8.2%	7.3%
Surfing	10.3%	10.3%
Canoeing/ kayak	7.3%	7.2%
Swim ocean	70.1%	67.1%
Snorkel	39.8%	36.2%
Freediving	1.5%	1.4%
Windsurf/ Kitesurf	0.3%	0.2%
Jet ski/ Parasail	2.9%	3.2%
Scuba	2.2%	2.4%
Fishing	2.3%	2.1%
Golf		

O'AHU ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	30.1%	28.4%
Spa	6.7%	7.6%
Hiking	45.6%	49.8%
Backpack/Camping	0.8%	1.2%
Agritourism	11.4%	13.5%
Sport event/ tournament	0.7%	0.6%
Park/ botanical garden	35.6%	39.3%
Waterpark	1.9%	1.8%
Mountain tube/ waterfall rappel	0.4%	0.7%
Zip lining	4.8%	4.2%
Skydiving	0.6%	1.0%
All terrain vehicle (ATV)	5.9%	6.3%
Horseback riding		

O'AHU ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	98.9%	98.6%
Lunch/ sunset/ dinner/ evening cruise	20.3%	23.6%
Live music/ stage show	21.8%	25.4%
Nightclub/ dancing/ bar/ karaoke	7.3%	6.8%
Fine dining	48.9%	50.4%
Family restaurant	61.4%	55.8%
Fast food	51.7%	49.3%
Food truck	47.3%	47.4%
Café/ coffee house	46.4%	45.6%
Ethnic dining	30.7%	33.2%
Prepared own meal	37.0%	34.6%

O'AHU ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	96.2%	95.8%
Mall/ department store	54.7%	50.3%
Designer boutique	17.7%	17.1%
Hotel/ resort store	38.5%	40.1%
Swap meet/ flea market	21.1%	18.6%
Discount/ outlet store	12.7%	15.0%
Supermarket	57.4%	48.9%
Farmer's market	22.7%	19.5%
Convenience store	60.0%	58.3%
Duty free store	4.6%	4.9%
Local shop/ artisan	53.3%	54.9%

O'AHU ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	64.6%	75.1%
Historic military site	35.7%	50.2%
Historic Hawaiian site	27.0%	33.2%
Other historical site	12.2%	12.8%
Art museum	3.0%	2.9%
Art galleries/ exhibition	3.9%	3.9%
Luau/ Polynesian show/ hula show	24.9%	30.7%
Lesson ex. ukulele, hula, canoe, lei making	3.7%	4.5%
Play/ concert/ theatre	1.3%	1.5%
Art/ craft fair	3.2%	4.0%
Festival event	3.2%	2.1%

O'AHU ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	89.5%	88.3%
Airport shuttle	17.2%	17.1%
Trolley	1.6%	2.2%
Public bus	8.2%	9.0%
Tour bus/ tour van	9.4%	14.7%
Taxi/ limo	13.9%	15.8%
Rental car	64.0%	59.3%
Ride share	29.6%	29.4%
Bicycle rental	3.5%	4.7%

O'AHU ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	37.9%	34.9%
Visit friends/ family	37.1%	34.2%
Volunteer non profit	1.3%	1.3%

ATTRACTIONS- O'AHU

	U.S. West	U.S. East
Atlantis Submarine & Cruises	2.2%	3.1%
Bernice P. Bishop Museum	3.6%	3.9%
Byodo In Temple	11.3%	12.4%
Chinatown/ Hnl Arts District	12.7%	12.2%
Diamond Head State Monument	30.7%	39.0%
Dole Plantation	32.8%	34.9%
Haleiwa	29.1%	27.4%
Hanauma Bay Nature Reserve	14.2%	14.2%
Harold L. Lyon Arboretum	1.0%	0.9%
Hawaii State Art Museum	1.2%	0.8%
Honolulu Museum of Art	1.8%	1.9%
Hawaiian Mission Houses, Historic site and Archives	0.8%	1.2%
Hawaii's Plantation Village	1.8%	2.1%

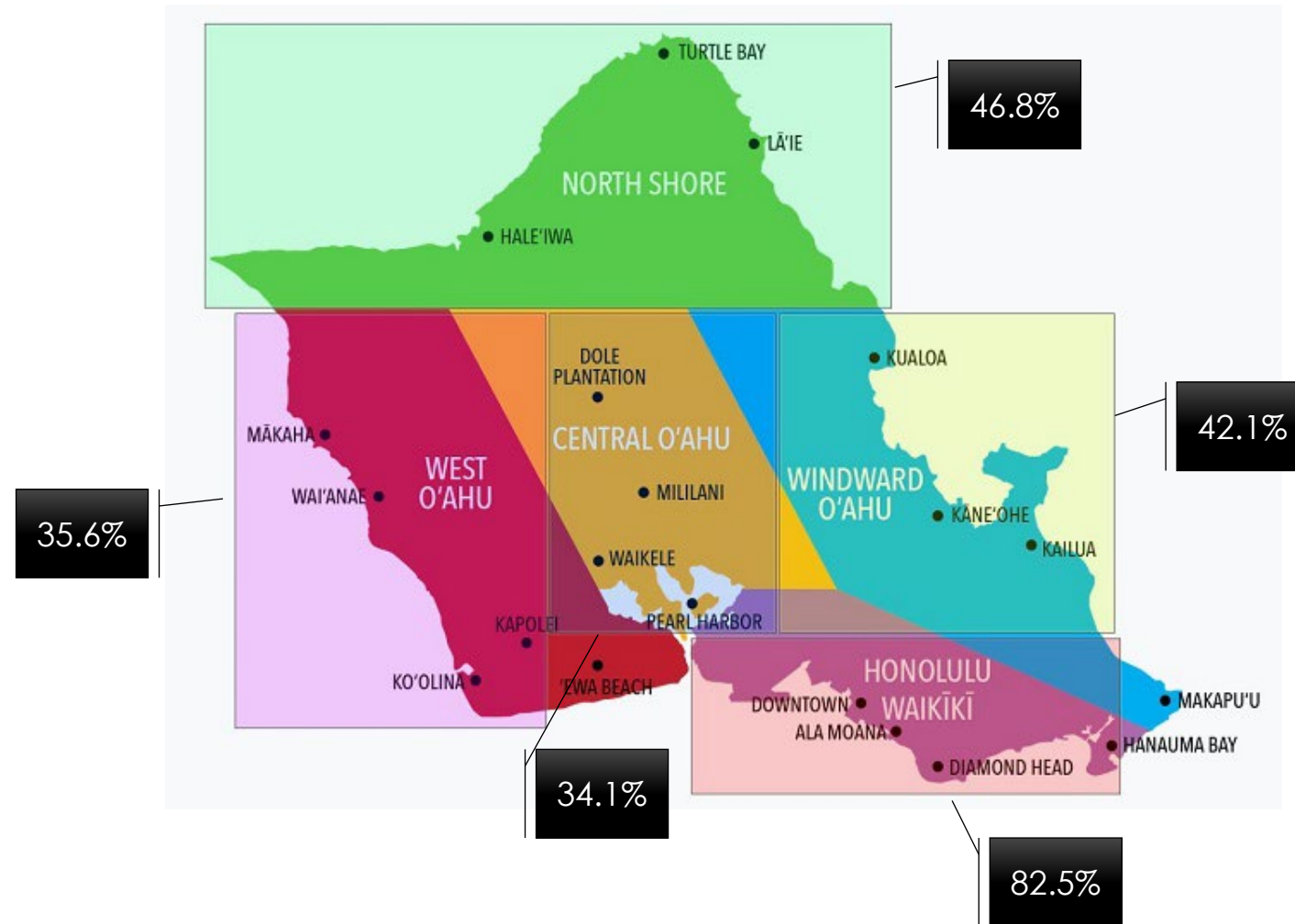
ATTRACTIONS- O'AHU

	U.S. West	U.S. East
Honolulu Zoo	7.1%	8.0%
Ho'omaluhia Botanical Garden	7.9%	8.9%
'Iolani Palace State Monument	4.3%	7.2%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	5.5%	9.6%
Kaka'ako Street Art	2.6%	1.8%
Koko Head Crater Trail	7.9%	10.9%
Kualoa Private Nature Reserve	15.5%	15.6%
Lanikai or Kailua Beach	34.0%	35.2%
Manoa Falls & Trail	10.6%	11.9%
National Memorial Cemetery of the Pacific	7.0%	11.8%
Nu'uuanu Pali Lookout	12.9%	15.3%

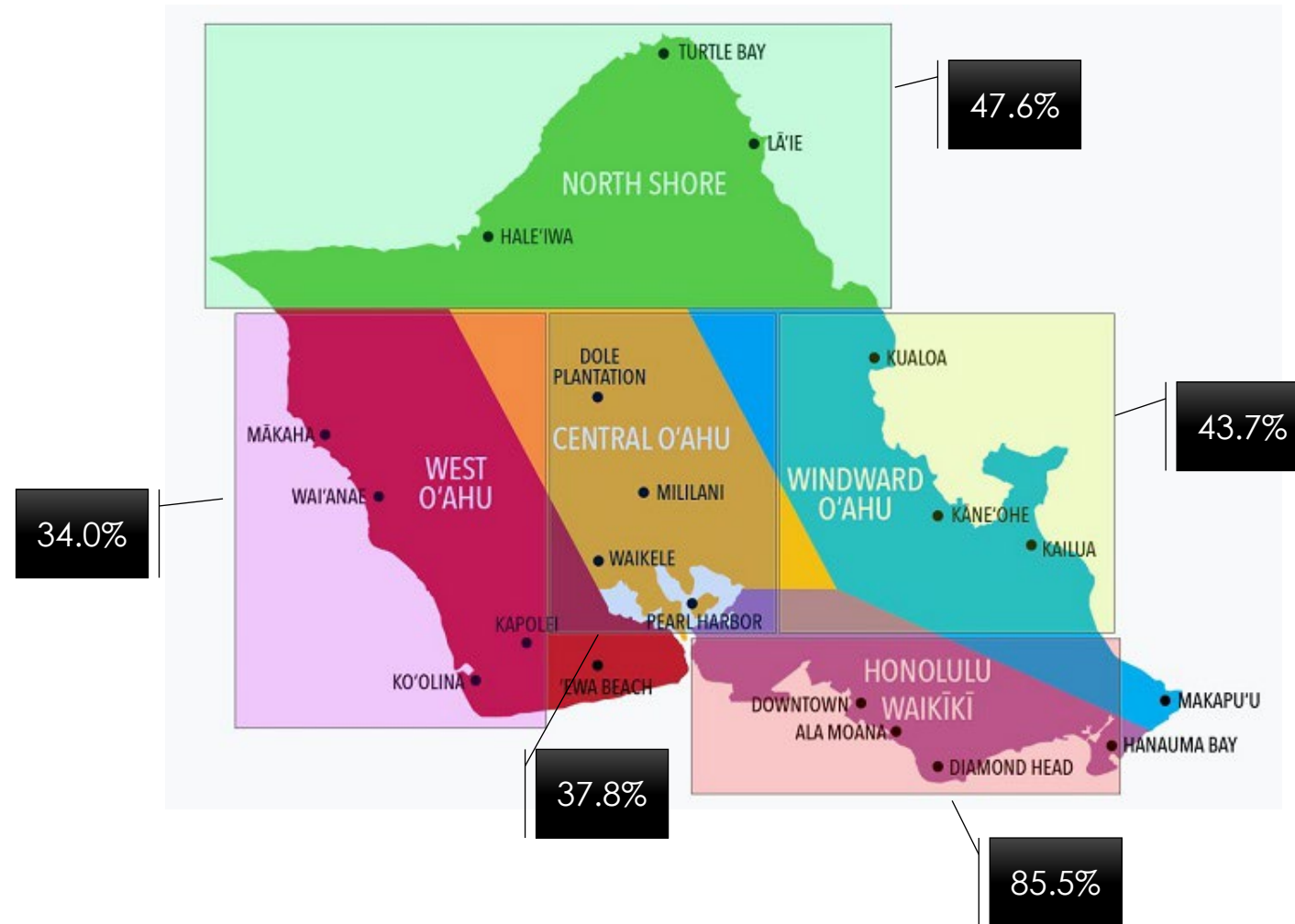
ATTRACTIONS- O'AHU

	U.S. West	U.S. East
North Shore Beaches		
Pearl Harbor	32.9%	47.6%
Polynesian Cultural Center	14.6%	13.1%
Queen Emma's Summer Palace	1.4%	1.6%
Sea Life Park Hawaii	3.5%	3.9%
Waikiki Aquarium	3.1%	2.6%
Waimanalo Beach Park	14.2%	15.6%
Waimea Valley		

AREAS VISITED - U.S. WEST

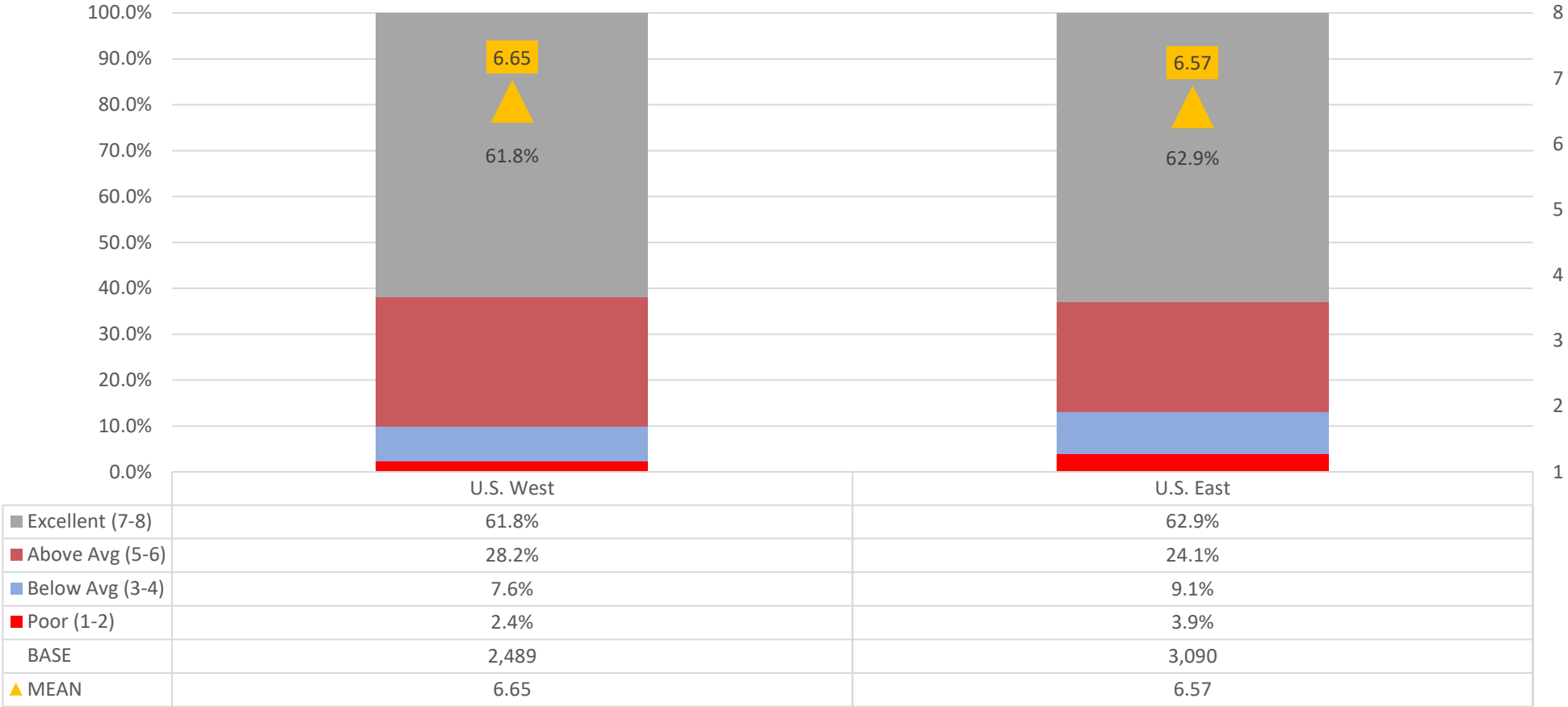


AREAS VISITED - U.S. EAST

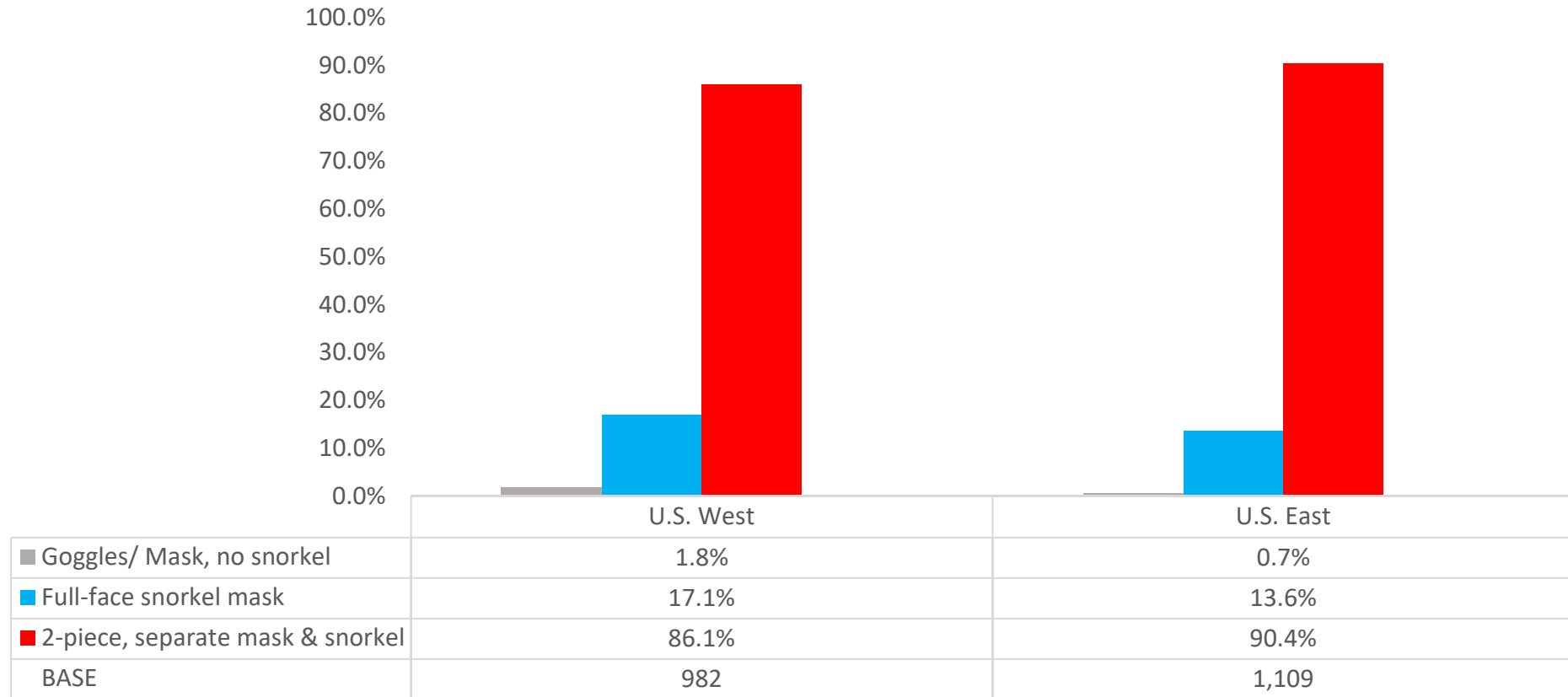


DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



SNORKELING EQUIPMENT USED - O'AHU

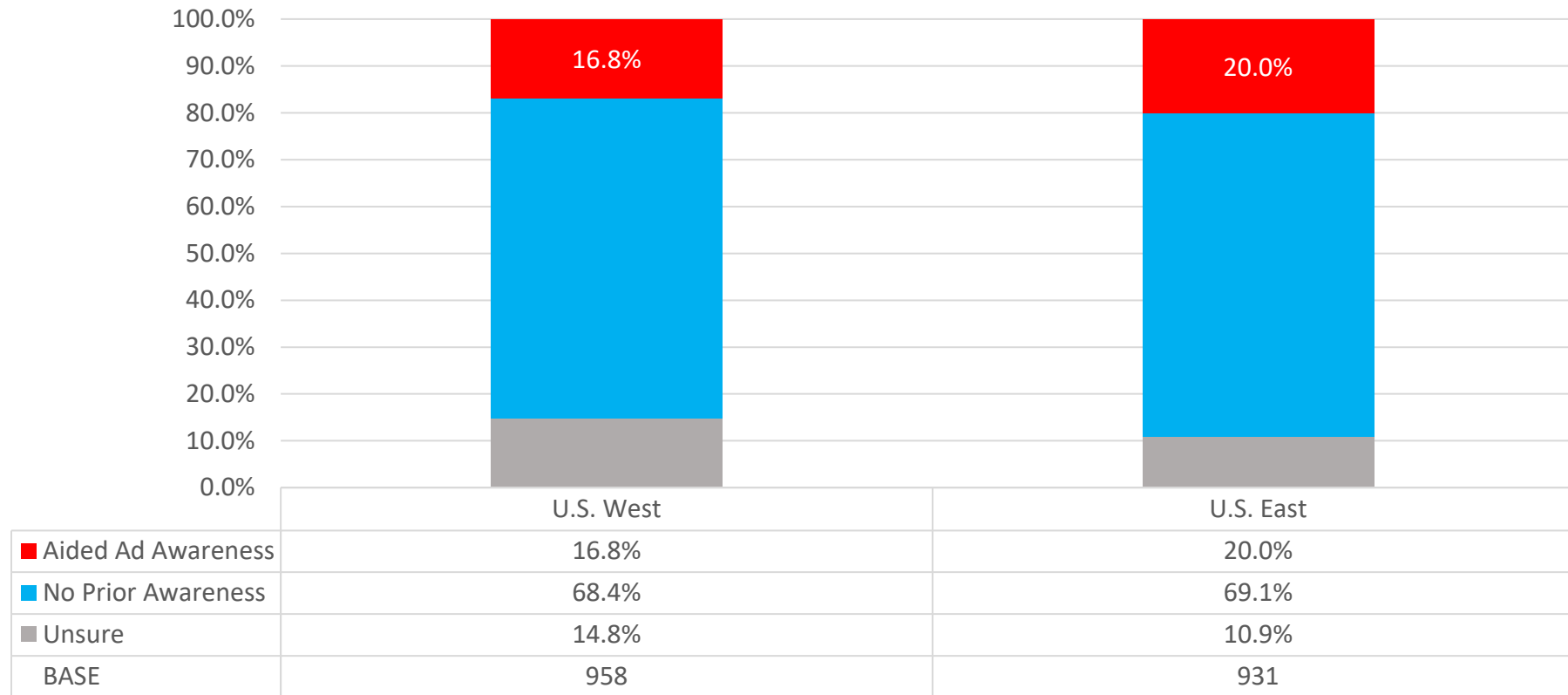


SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.2%	98.2%
Yes, needed assistance using 2 piece mask & snorkel	1.5%	1.4%
Yes, while snorkeling using a full face snorkel mask	0.3%	0.4%
BASE	964	1101

Section – Kaua'i

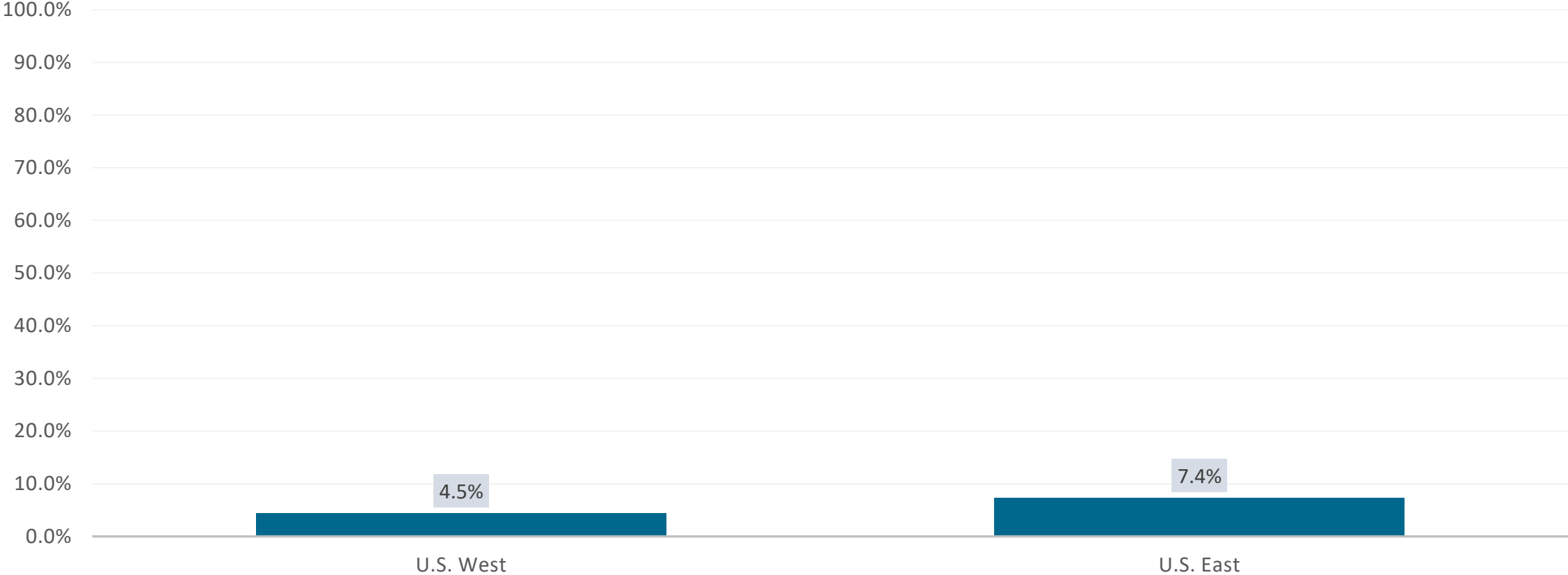
AIDED ADVERTISING AWARENESS - KAUA'I



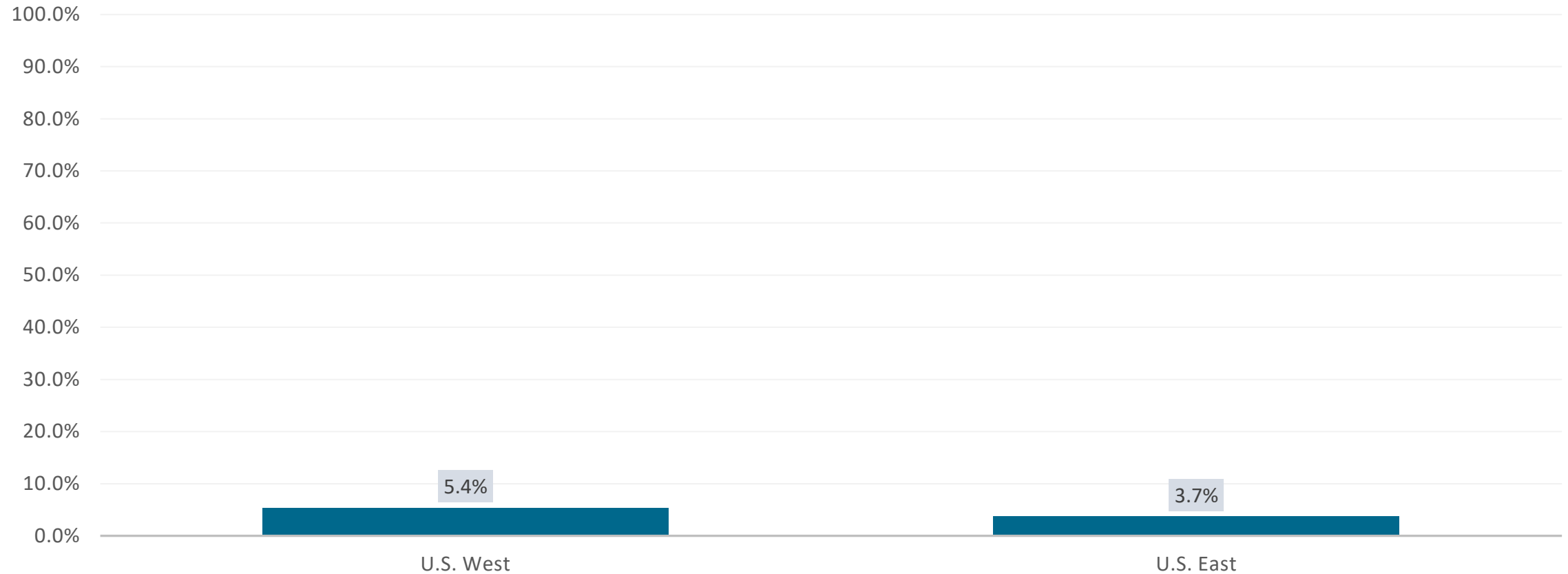
AIDED ADVERTISING AWARENESS - KAUA'I

- ***Trips to Hawai'i:*** Repeat visitors from U.S. West were more likely to have been exposed to recent marketing for Kaua'i than first-time visitors.
- ***Age:*** Aided advertising awareness for the island of Kaua'i was highest amongst seniors (65+) from both U.S. West and U.S. East.
- ***Gender:*** Male visitors from U.S. West were more likely to have been exposed to ads related to Kaua'i than female visitors.

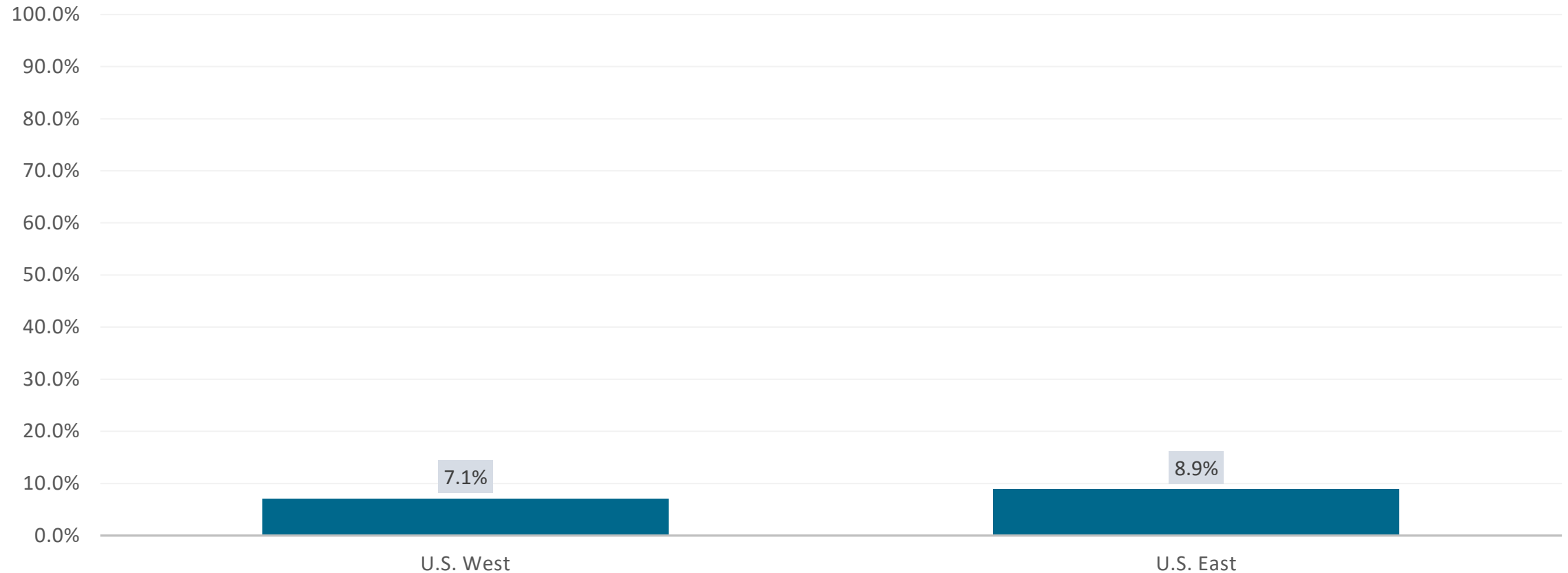
IMPACT OF LOCATION FILMING - KAUA'I



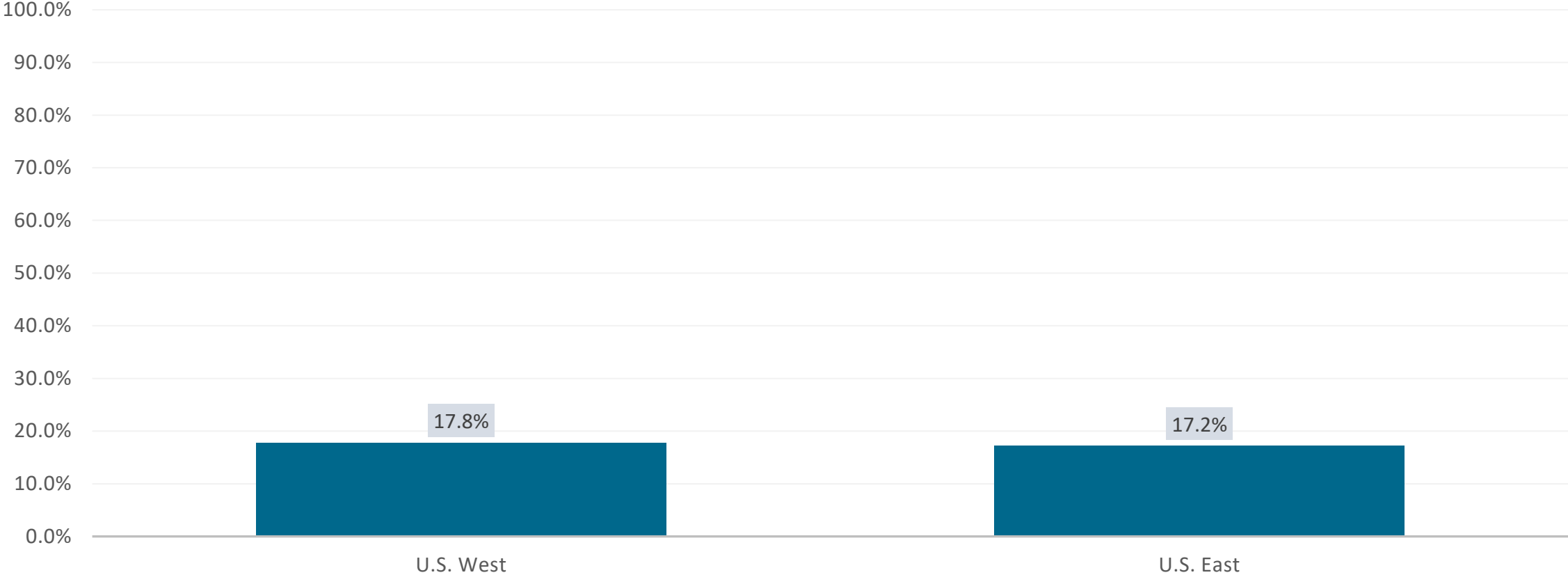
IMPACT OF HAWAIIAN MUSIC- KAUA'I



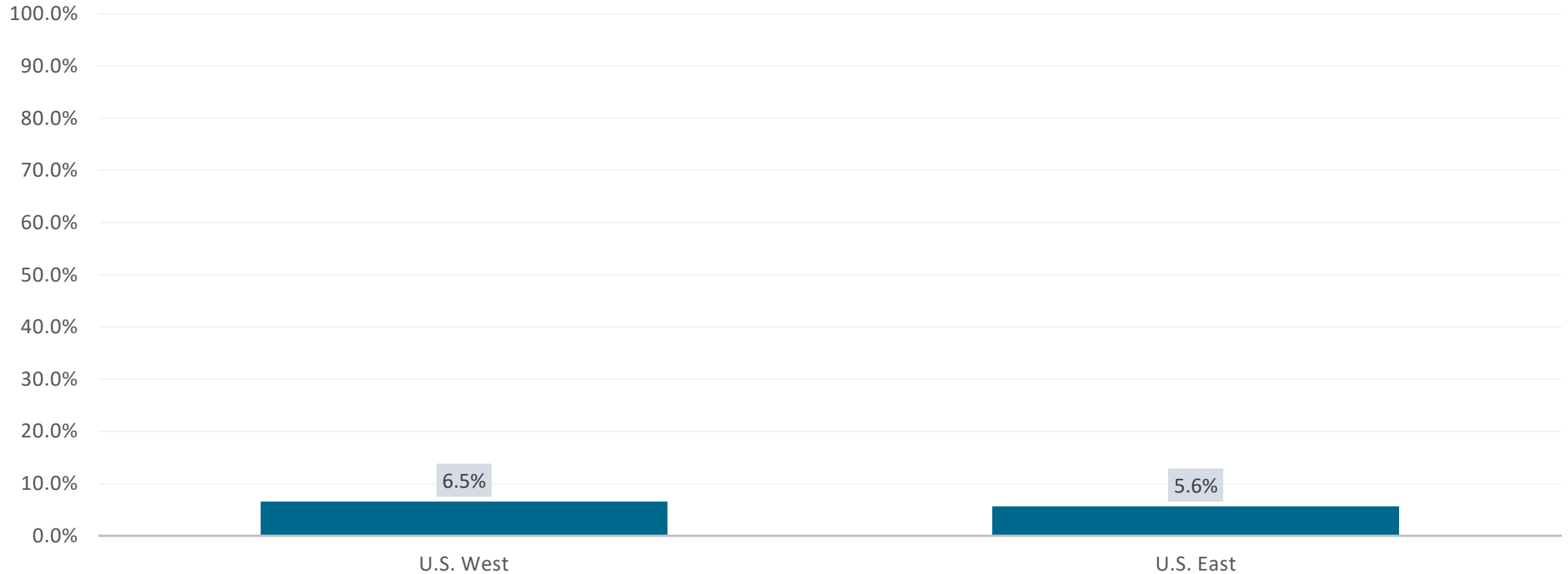
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - KAUA'I



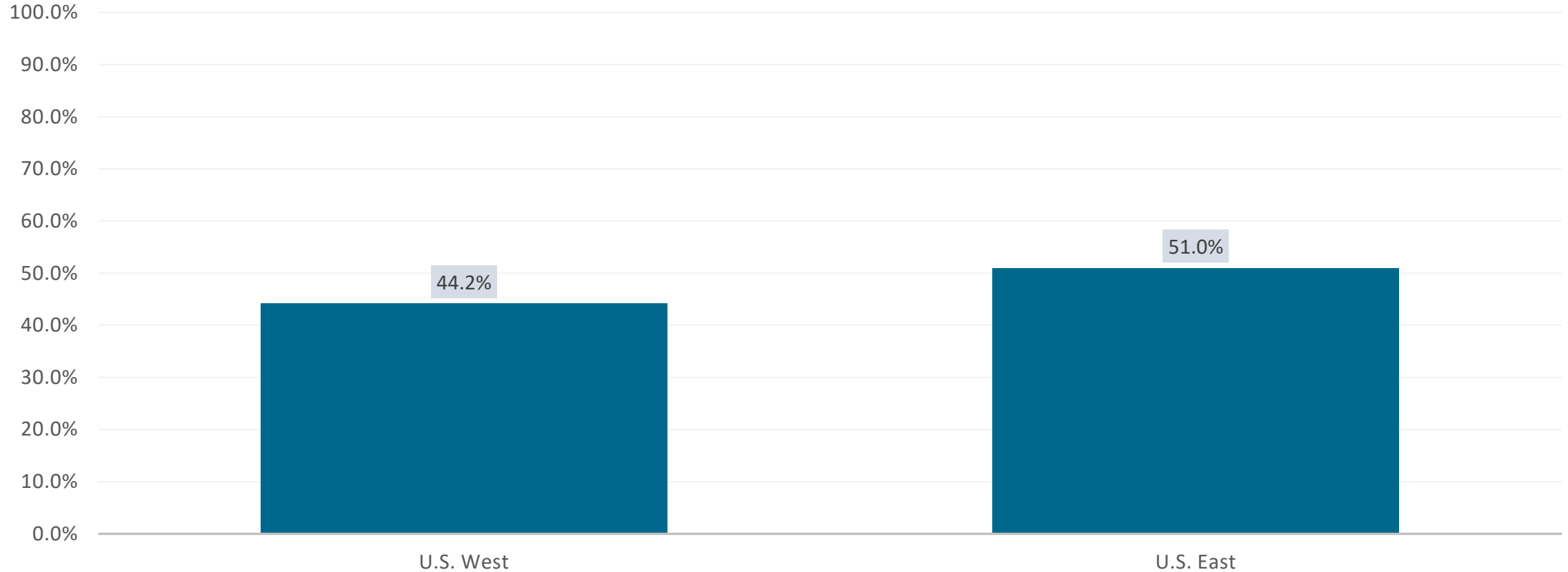
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - KAUA'I



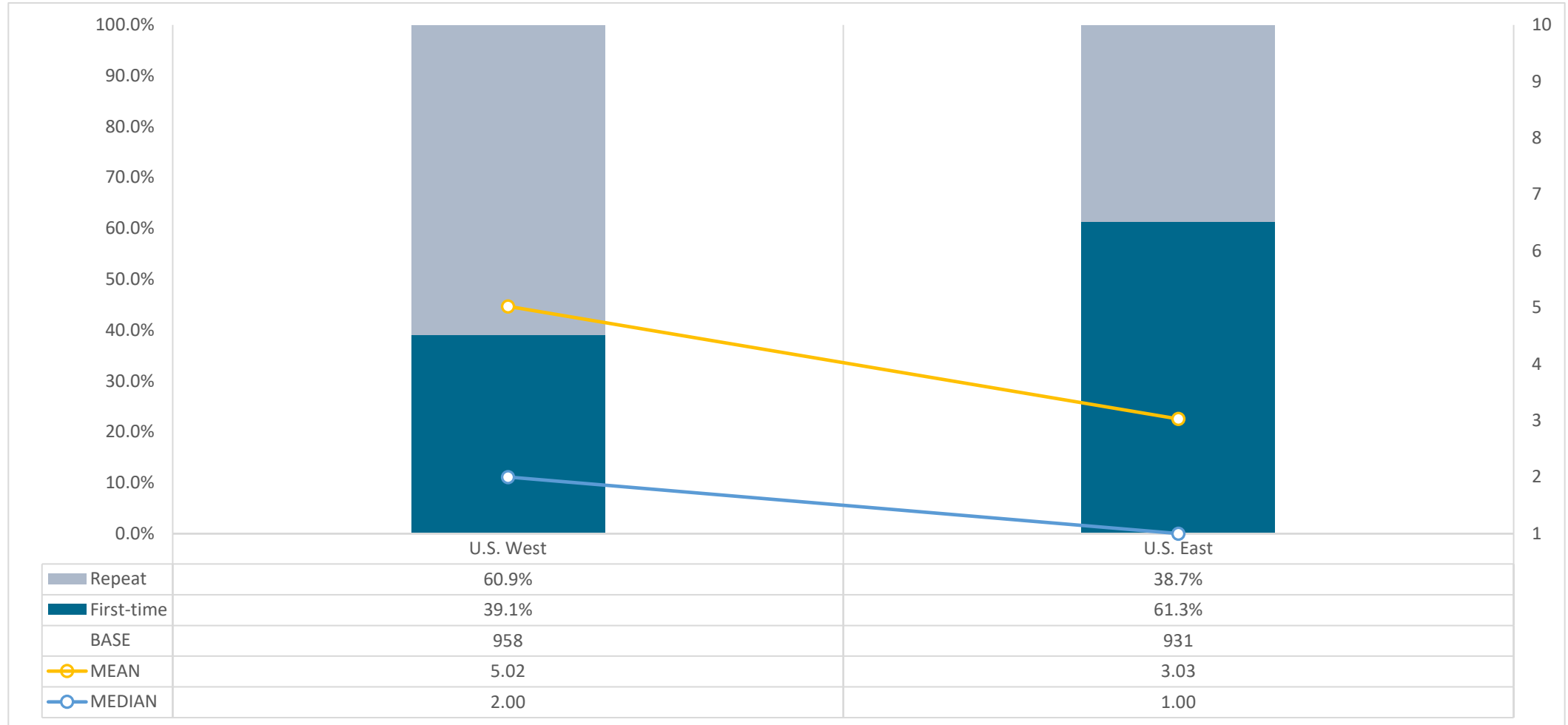
IMPACT OF HAWAIIAN CULTURAL EVENTS - KAUA'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - KAUA'I



1st TIME VS REPEAT VISITOR - KAUA'I



1st TIME VS REPEAT VISITOR - KAUA'I

- **Islands visited:** Visitors from U.S. East whose trip was entirely on Kaua'i have been to the state on a more frequent basis compared to those who stayed on other islands in addition to Kaua'i.
- **Age:** Older visitors have traveled to Kaua'i (those 50+) on a more frequent basis amongst both U.S. visitor markets.
- **Gender:** Male visitors from both U.S. West and U.S. East have been to Kaua'i more often than female visitors.

ACCOMMODATIONS - KAUA'I

	U.S. West	U.S. East
Hotel/ resort/ villa		
Timeshare Unit	23.1%	20.0%
Vacation rental (includes AirBnB, VRBO, etc.)	21.2%	19.5%
Condominium/ apartment	19.3%	13.9%
Stayed with friends or relatives	6.9%	5.2%
Rental House	4.8%	4.2%
Own property/ second home	3.0%	1.1%
Private Room in Private Home	1.9%	1.4%
Campsite, Beach	1.4%	1.1%
Day trip/ Did not stay overnight		

ACCOMMODATIONS - KAUA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	39.0%	33.6%
■ Residential Neighborhood	61.0%	66.4%
BASE	249	231

ACCOMMODATIONS - KAUA'I

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Location	42.2%	36.6%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	17.1%	15.9%
Price/ value/ best deal	12.9%	20.2%
Owned by self, friend or relative	9.6%	7.3%
Ability to have travel party members stay together	8.9%	7.7%
Availability	5.0%	6.1%
Recommendation from friends or family	2.7%	5.4%
Previous Experience	0.8%	0.0%
No choice/ part of package	0.8%	0.0%

STRENGTHS/ POSITIVE ASPECTS - KAUA'I

	U.S. West	U.S. East
Nature/ natural beauty/ scenery	34.8%	48.6%
Beach/ ocean	17.2%	8.7%
Variety of activities/ attractions/ many choices	8.9%	12.6%
Feeling of the "Aloha Spirit"	8.1%	6.5%
Friendliness of the local people	6.9%	6.7%
Accommodations/ was as promised	4.2%	3.4%
Events/ celebrations with friends/ family	4.1%	2.7%
Overall customer service/ hospitality/ the people	3.0%	1.5%
Food/ restaurant variety/ dining options	2.2%	1.9%
Local culture/ people/ music	1.5%	1.6%
Accommodations/ good service from staff	1.5%	0.7%

STRENGTHS/ POSITIVE ASPECTS - KAUA'I

- **Education:** Visitors from both U.S. West and U.S. East who were college graduates were more likely to cite Kaua'i's natural beauty as a driver of trip satisfaction compared to those without a college degree.
- **Age:** Kaua'i's natural beauty was more a driver of trip satisfaction amongst younger visitors from U.S. West.
- **Gender:** Female visitors from U.S. East gave higher satisfaction scores compared to male visitors.
- **Islands visited:** Respondents from both U.S visitor markets who stayed entirely on Kaua'i were more likely to list the beach/ ocean as a driver of satisfaction, more so than those who stayed on multiple islands.
- **Travel party size:** Those who traveled to Kaua'i on their own from U.S. West were more likely to include the "Aloha spirit" as a driver of satisfaction than those who traveled with others on their trip.
- **Trips to Hawai'i:** Kaua'i's natural beauty was a stronger driver of satisfaction amongst first-time visitors from U.S. West than it was for repeat visitors.

AREAS OF OPPORTUNITIES - KAUA'I

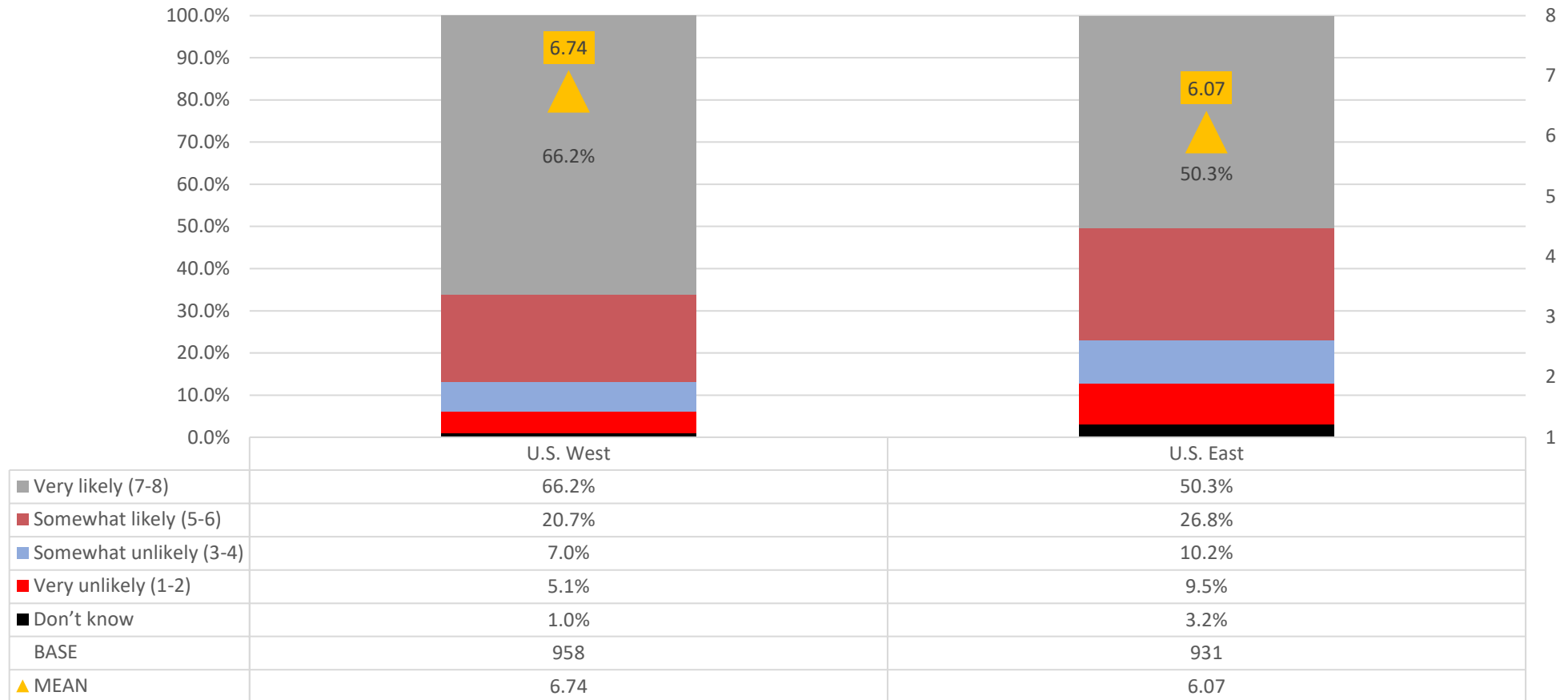
	U.S. West	U.S. East
No negatives/ everything was great	28.7%	32.1%
Traffic (congested/slow)	14.6%	13.8%
Food/ restaurant variety/ dining options	10.4%	9.7%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	9.8%	8.5%
Coronavirus / COVID 19 pandemic	8.1%	7.3%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	4.7%	6.7%
Would like to experience more local culture	4.9%	5.7%
Driving experience (signage, road surface, traffic violations, bad drivers)	3.8%	2.5%
Food/ restaurant quality	2.3%	2.2%
Variety of activities/ attractions	2.1%	2.1%

AREAS OF OPPORTUNITIES - KAUA'I

- **Education:** Those without a college degree from both U.S. visitor markets were less likely to identify anything specific about their stay that they felt could be improved upon.
- **Age:** Amongst visitors from U.S. West, dissatisfaction with their rental car experience was more of an issue with senior respondents.
- **Gender:** Traffic was more of an issue amongst male respondents from U.S. East than it was for female respondents.
- **Household income:** Wealthier visitors from U.S. West were more likely to be dissatisfied with dining options than less affluent visitors.
- **Trips to Hawai'i:** Repeat visitors from U.S. West were more likely to take issue with the variety of food options on Kaua'i compared to those who visited the island for the first time.

LIKELIHOOD OF RETURN VISIT - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

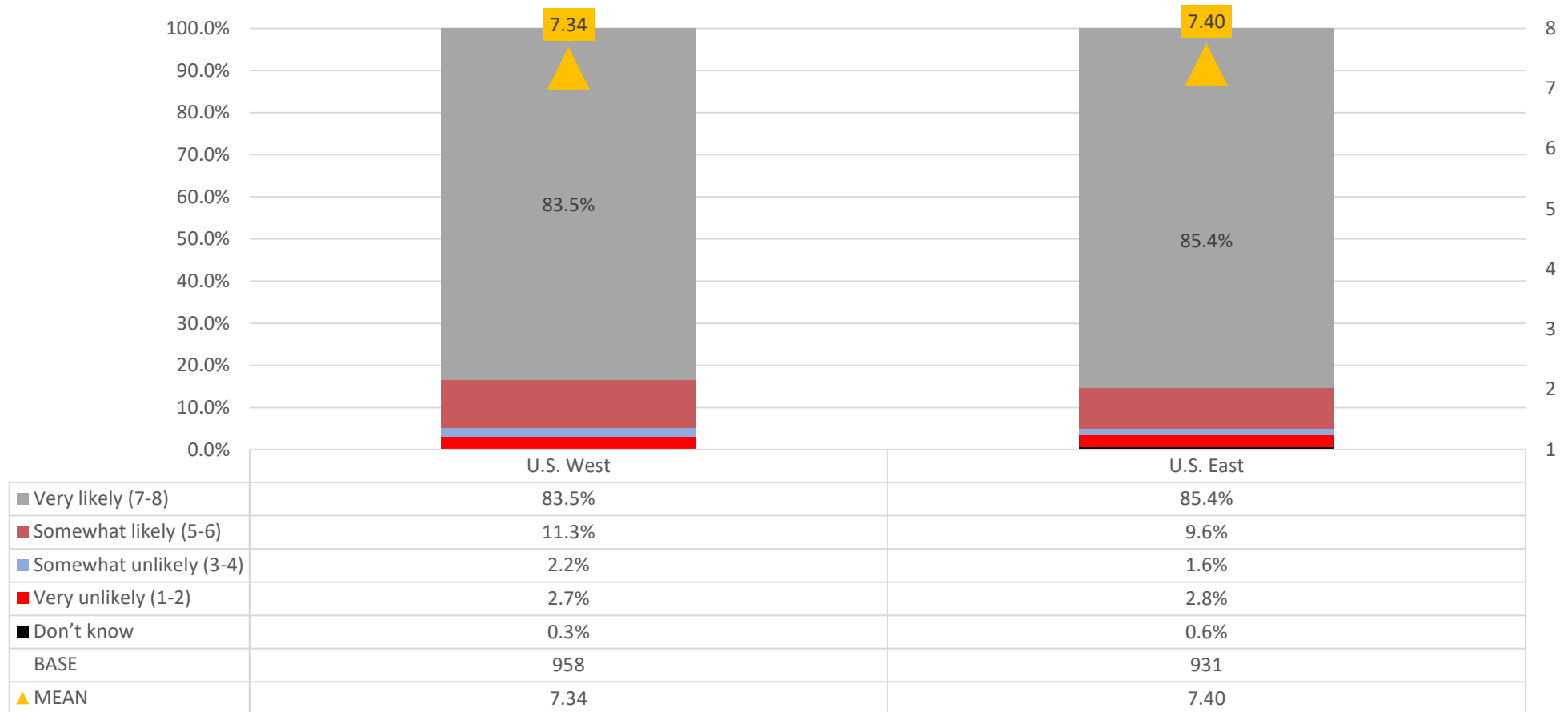
- **Islands visited:** Visitors from both U.S. markets who stayed entirely on Kaua'i expressed a stronger likelihood of returning to the island than those who stayed on multiple islands.
- **Travel party size:** Those who traveled to Kaua'i alone from U.S. West expressed a stronger likelihood of returning to the island compared to those who traveled with others.

REASONS FOR NOT RETURNING - KAUA'I

	U.S. West	U.S. East
Want to go someplace new		
Too expensive/cost	17.3%	27.0%
Not enough value for the price	15.6%	8.9%
Flight too long	2.5%	25.6%
No reason to return/ nothing new	12.2%	8.5%
Coronavirus / COVID 19 pandemic	9.5%	6.2%
Unfriendly people/ felt unwelcome	10.7%	4.2%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	6.4%	9.8%
Too crowded/ congested/ traffic	7.9%	3.7%
Nothing to do/ boring	5.1%	2.9%
Other financial obligations	0.0%	9.6%
Poor health/ age restriction	3.1%	2.2%
Poor service		

BRAND/ DESTINATION ADVOCACY – KAUA’I

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



BRAND/ DESTINATION ADVOCACY – KAUA'I

- **Islands visited:** Visitors from U.S. West who stayed entirely on Kaua'i were more likely to recommend the island to others compared to those who visited multiple islands.
- **Gender:** Female respondents from both U.S. visitor markets were stronger advocates for Kaua'i than their male counterparts.

KAUA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	96.1%	97.0%
On own (self guided)	88.9%	86.1%
Helicopter/ airplane	7.1%	16.4%
Boat/ submarine/ whale	27.3%	39.6%
Visit towns	60.7%	60.0%
Limo/ van/ bus tour	1.2%	2.9%
Scenic views/ natural landmark	67.3%	74.1%
Movie/ TV/ film location	3.1%	5.5%

KAUA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	86.2%	85.0%
Bodyboard	13.2%	8.8%
Stand up paddle board	3.9%	4.1%
Surfing	8.5%	8.3%
Canoeing/ kayak	13.9%	13.6%
Swim ocean	66.6%	66.2%
Snorkel	49.6%	45.9%
Freediving	0.4%	0.8%
Windsurf/ Kitesurf	0.2%	0.0%
Jet ski/ Parasail	0.1%	0.0%
Scuba	2.6%	2.9%
Fishing	1.5%	3.7%
Golf		

KAUA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	37.2%	35.7%
Spa	6.7%	6.6%
Hiking	51.2%	58.6%
Backpack/Camping	3.1%	3.4%
Agritourism	9.0%	9.5%
Sport event/ tournament	0.2%	0.4%
Park/ botanical garden	31.1%	37.9%
Waterpark	0.4%	0.0%
Mountain tube/ waterfall rappel	7.2%	7.2%
Zip lining	4.3%	3.8%
Skydiving	0.1%	0.8%
All terrain vehicle (ATV)	4.8%	6.9%
Horseback riding		

KAUA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.3%	98.6%
Lunch/ sunset/ dinner/ evening cruise	19.6%	27.0%
Live music/ stage show	14.1%	20.1%
Nightclub/ dancing/ bar/ karaoke	4.2%	3.8%
Fine dining	51.5%	53.2%
Family restaurant	57.1%	55.8%
Fast food	31.1%	30.0%
Food truck	44.2%	41.8%
Café/ coffee house	48.0%	46.2%
Ethnic dining	22.6%	24.3%
Prepared own meal	70.2%	55.9%

KAUA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	97.0%	95.7%
Mall/ department store	22.1%	20.0%
Designer boutique	16.4%	17.1%
Hotel/ resort store	22.2%	27.3%
Swap meet/ flea market	5.1%	6.1%
Discount/ outlet store	10.4%	11.1%
Supermarket	79.3%	71.4%
Farmer's market	44.0%	38.4%
Convenience store	43.4%	43.7%
Duty free store	1.2%	1.3%
Local shop/ artisan	72.1%	73.3%

KAUA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	52.3%	57.8%
Historic military site	5.0%	6.9%
Historic Hawaiian site	26.9%	30.7%
Other historical site	8.7%	11.8%
Art museum	1.4%	0.8%
Art galleries/ exhibitions	9.6%	9.7%
Luau/ Polynesian show/ hula show	9.4%	15.6%
Lesson ex. ukulele, hula, canoe, lei making	2.9%	2.5%
Play/ concert/ theatre	1.3%	1.0%
Art/ craft fair	9.7%	10.1%
Festival event	2.9%	2.9%

KAUA'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	92.0%	94.8%
Airport shuttle	18.5%	16.1%
Trolley	0.1%	0.1%
Public bus	1.5%	2.6%
Tour bus/ tour van	2.0%	4.4%
Taxi/ limo	9.2%	13.1%
Rental car	84.8%	85.7%
Ride share	8.2%	8.0%
Bicycle rental	4.4%	3.8%

KAUA'I ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	24.1%	18.5%
Visit friends/ family	22.7%	17.5%
Volunteer non profit	2.1%	1.9%

ATTRACTIONS- KAUA'I

	U.S. West	U.S. East
Fern Grotto		
Hanalei Town	47.2%	47.1%
Hanalei Beach	45.0%	45.0%
Kalapaki Beach	22.1%	30.7%
Kalalau Trail	13.8%	19.6%
Bike Path in Kapa'a	10.9%	10.1%
Kaua'i Museum	2.0%	3.2%
Ke'e Beach	11.0%	12.7%
Kilauea Lighthouse	26.8%	30.3%
Koke'e		

ATTRACTIONS- KAUA'I

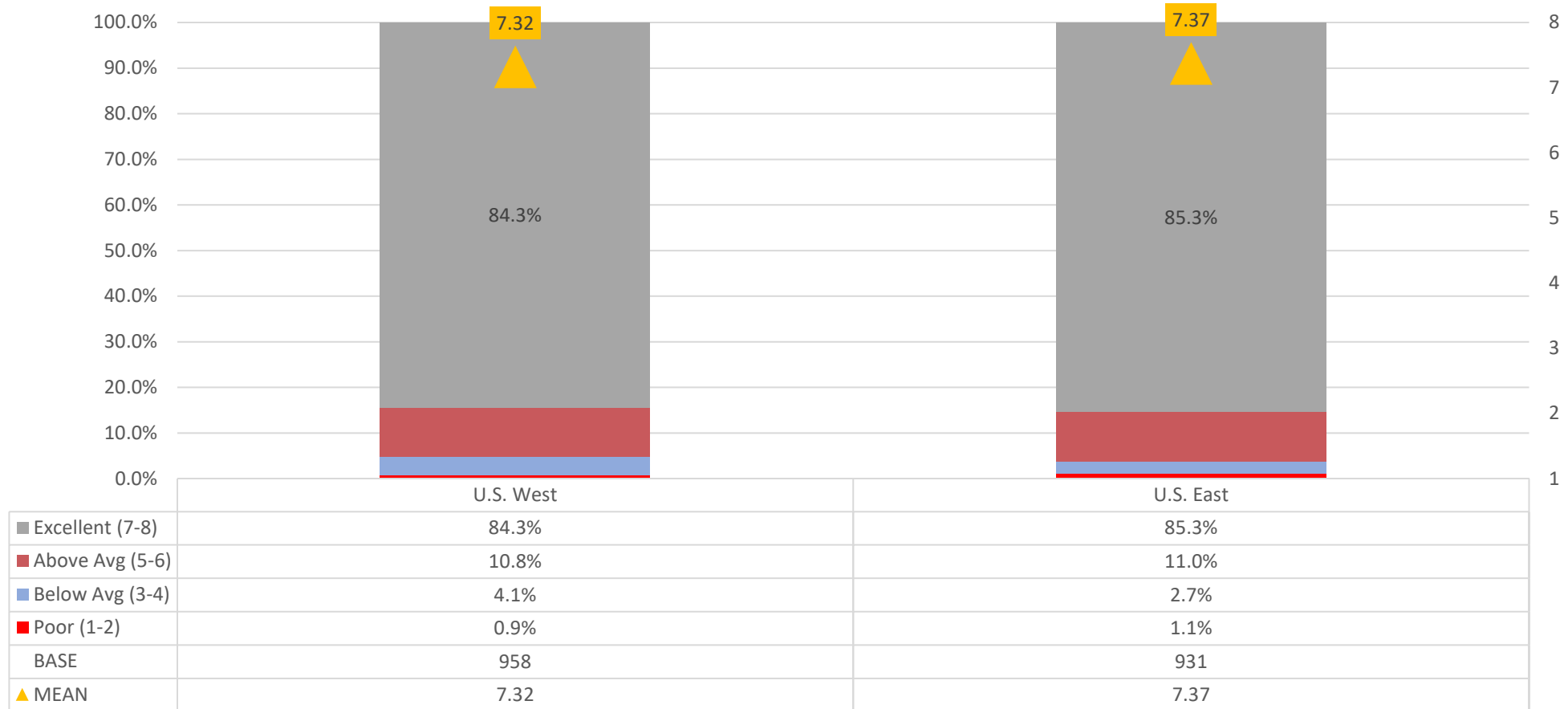
	U.S. West	U.S. East
Koke'e Museum	4.0%	4.4%
Na 'Aina Kai Gardens	2.3%	2.1%
Napali Coast	38.2%	55.2%
Allerton Gardens	6.3%	6.7%
Limahuli Gardens	4.4%	5.8%
Old Koloa Town	43.0%	34.7%
Opaeka'a Falls	19.3%	27.3%

ATTRACTIONS- KAUA'I

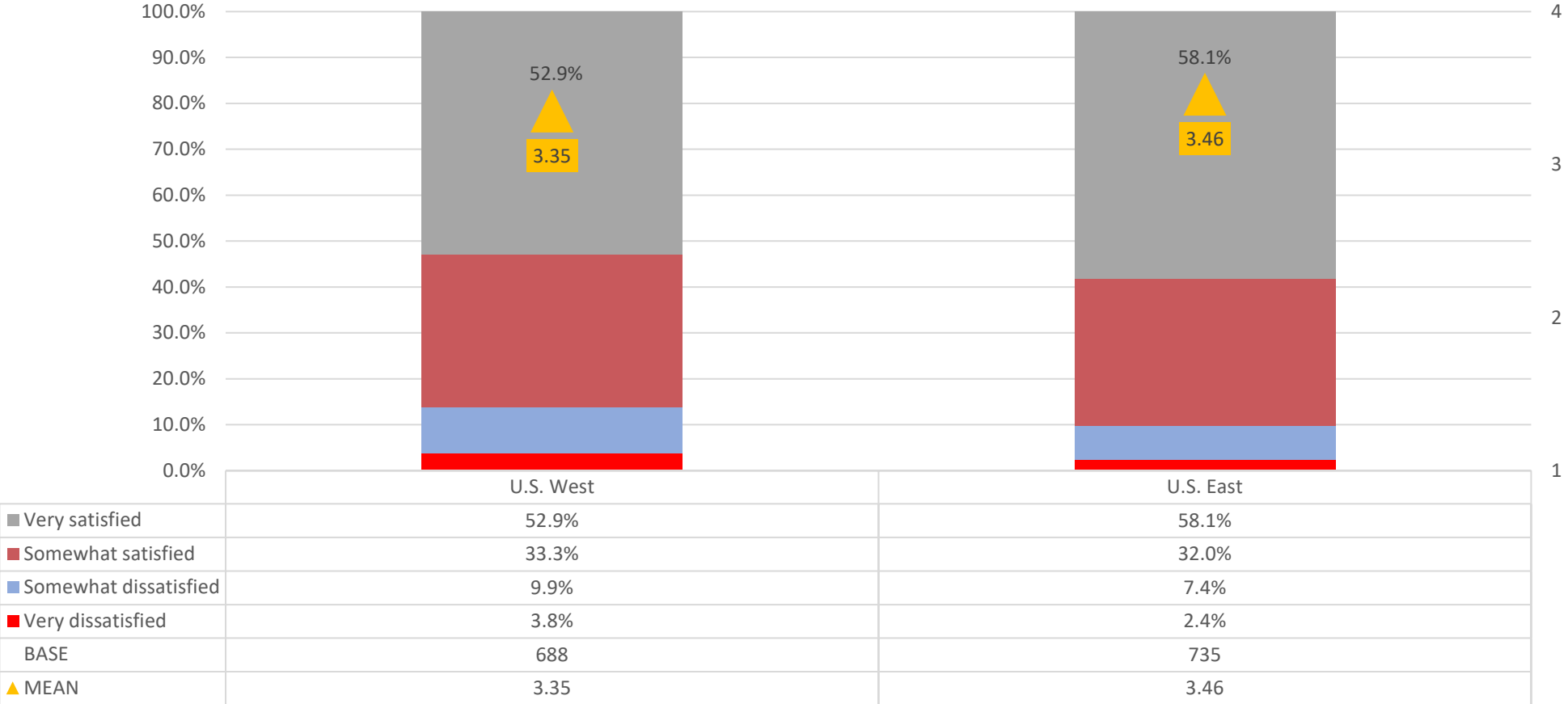
	U.S. West	U.S. East
Po'ipu Beach		
Smith's Tropical Paradise Gardens	4.8%	5.6%
Spouting Horn	39.5%	33.7%
Wailua Falls	35.4%	46.8%
Wailua River	22.1%	25.6%
Waimea Canyon	50.4%	62.4%
Disc Golf	0.9%	0.9%
Mini Golf		

FRIENDLINESS OF KAUA'I RESIDENTS

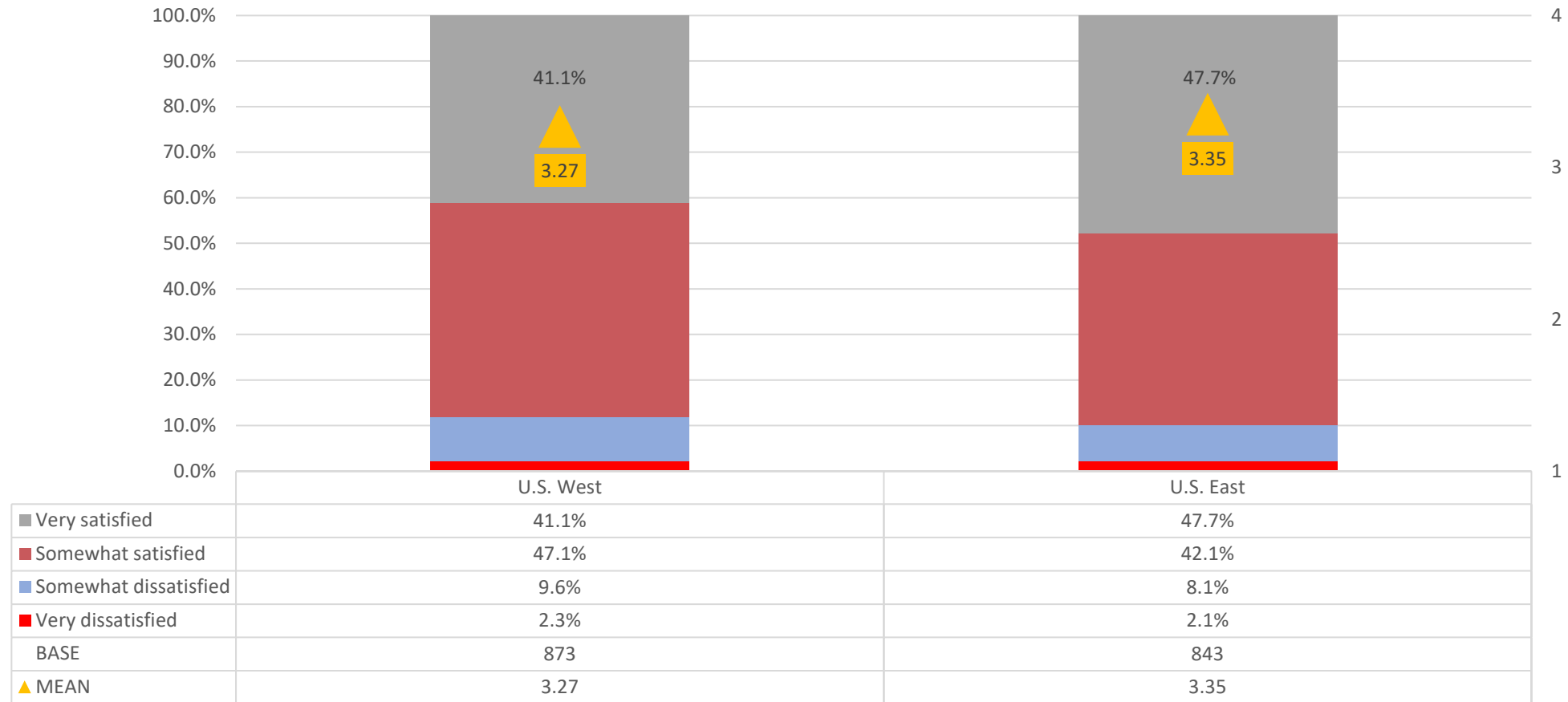
8-pt Rating Scale
8=Excellent/ 1=Poor



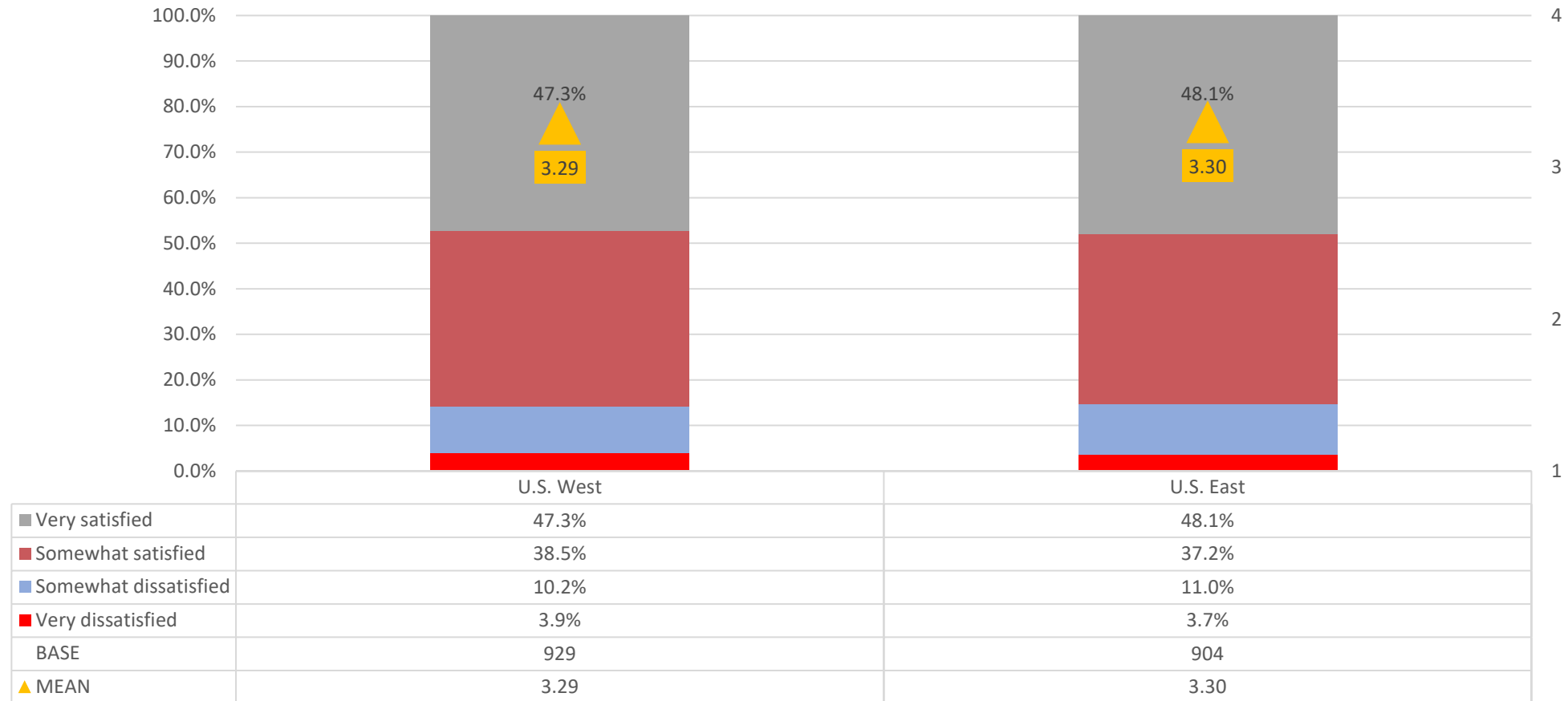
ENTERTAINMENT - KAUA'I



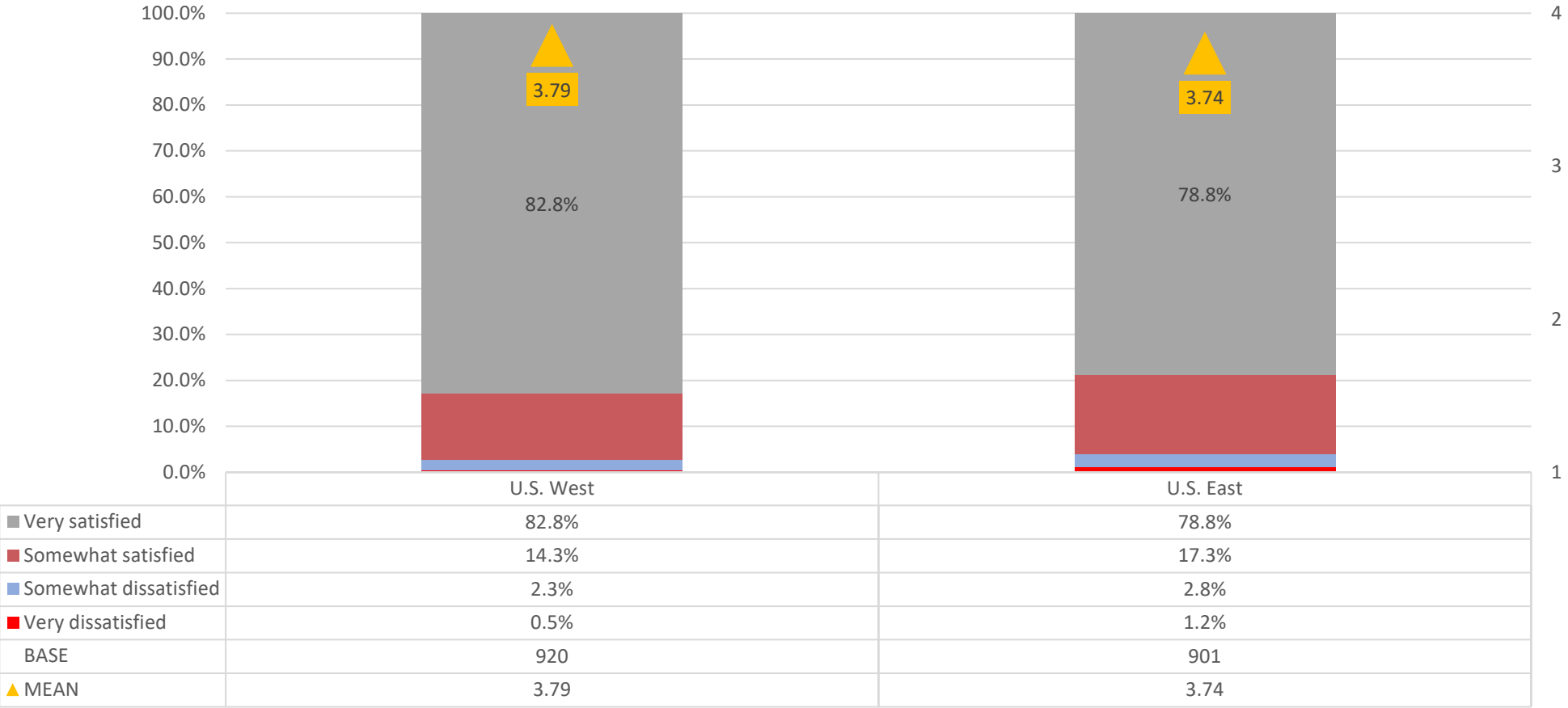
SHOPPING - KAUA'I



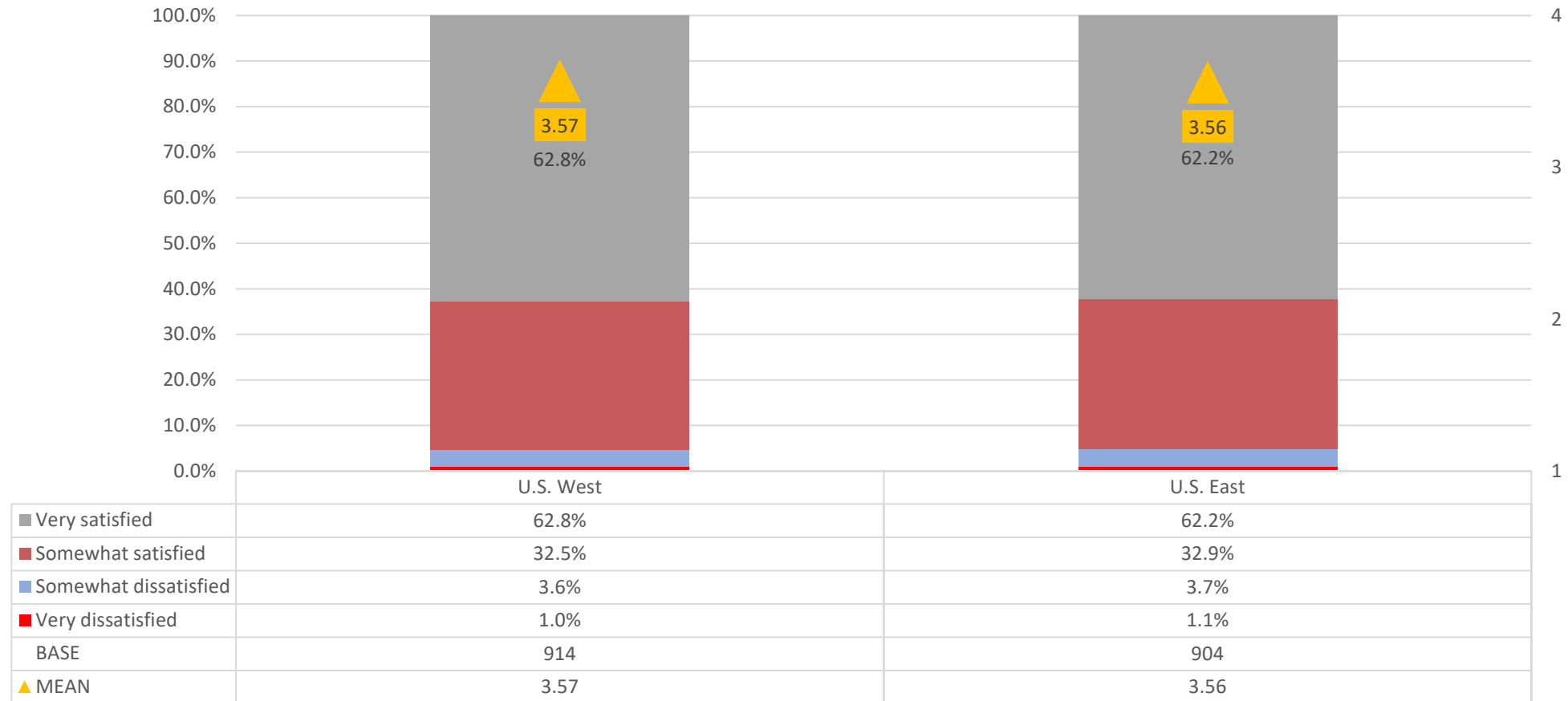
DINING - KAUA'I



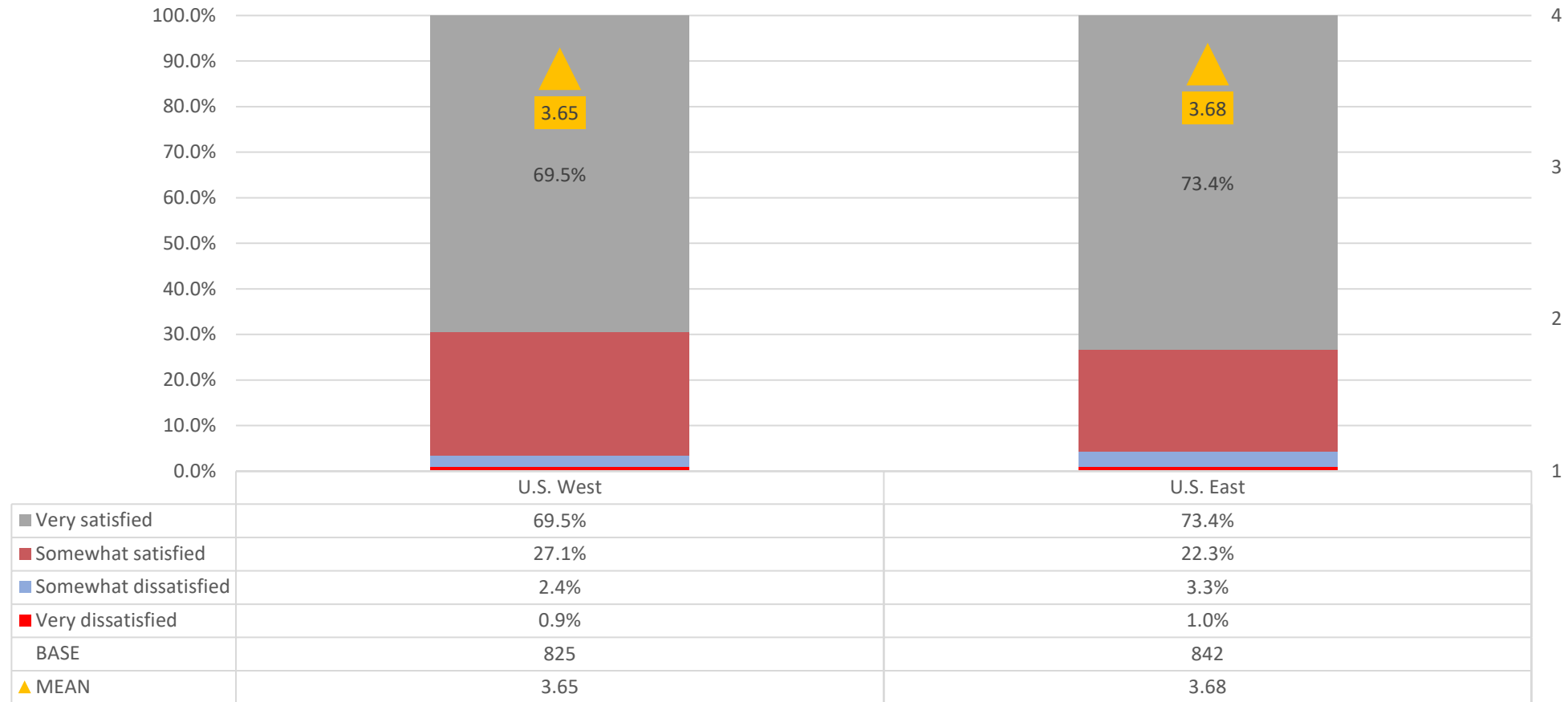
BEACHES - KAUA'I



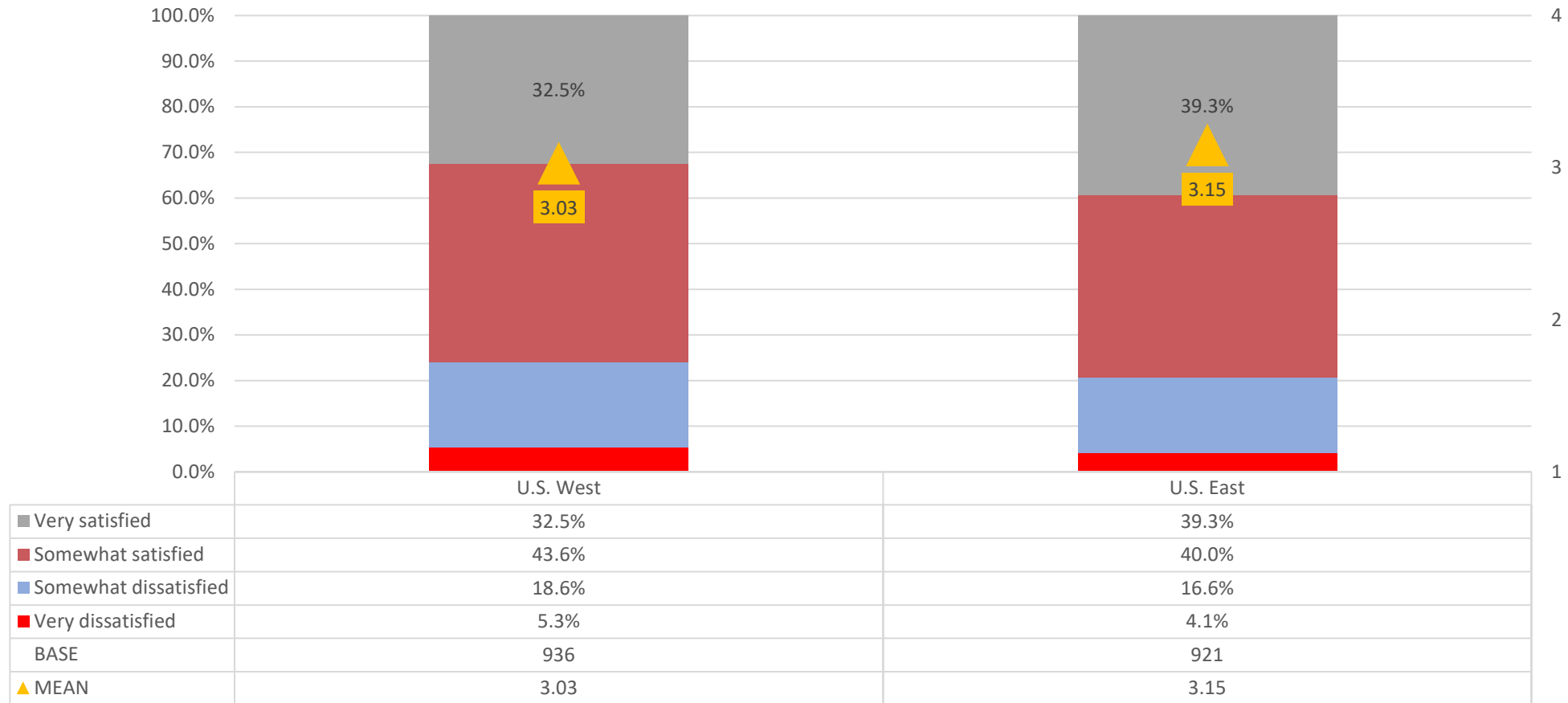
PUBLIC AREAS - KAUA'I



PARKS - KAUA'I



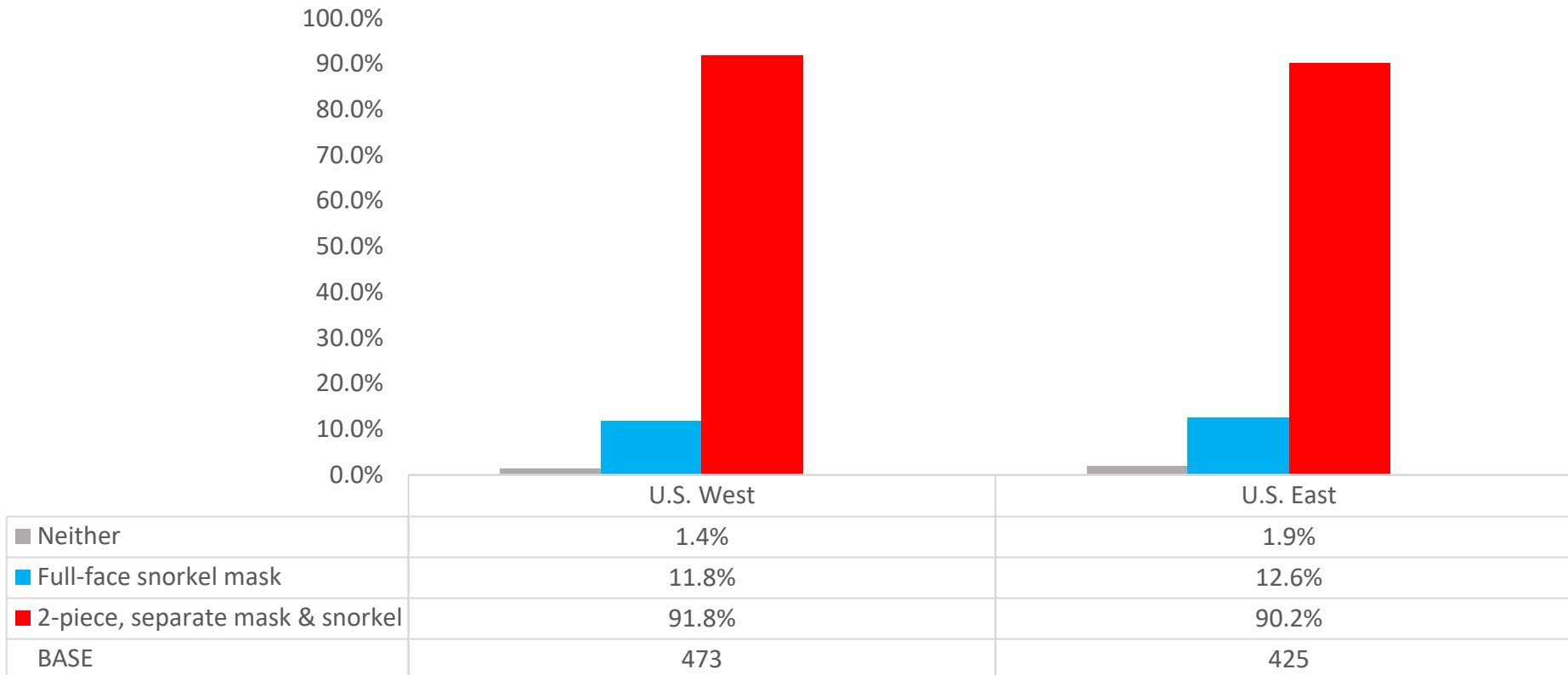
ROADS - KAUA'I



TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East
Been here before		
Friend recommendation	26.4%	36.6%
Visiting Family/ Friends	4.9%	5.6%
Article/ Blog	2.8%	5.4%
Own a timeshare	3.2%	2.5%
Location/ Never been, but went to other islands	3.3%	1.6%
Business related	1.8%	1.4%
Nature/ Beauty/ Scenery	1.3%	2.0%
Social Media Post	1.0%	2.6%
Travel Agent	0.8%	3.1%
Attending Conference/ Event	1.4%	1.5%
Have timeshare/Have property/Renting		

SNORKELING EQUIPMENT USED - KAUA'I

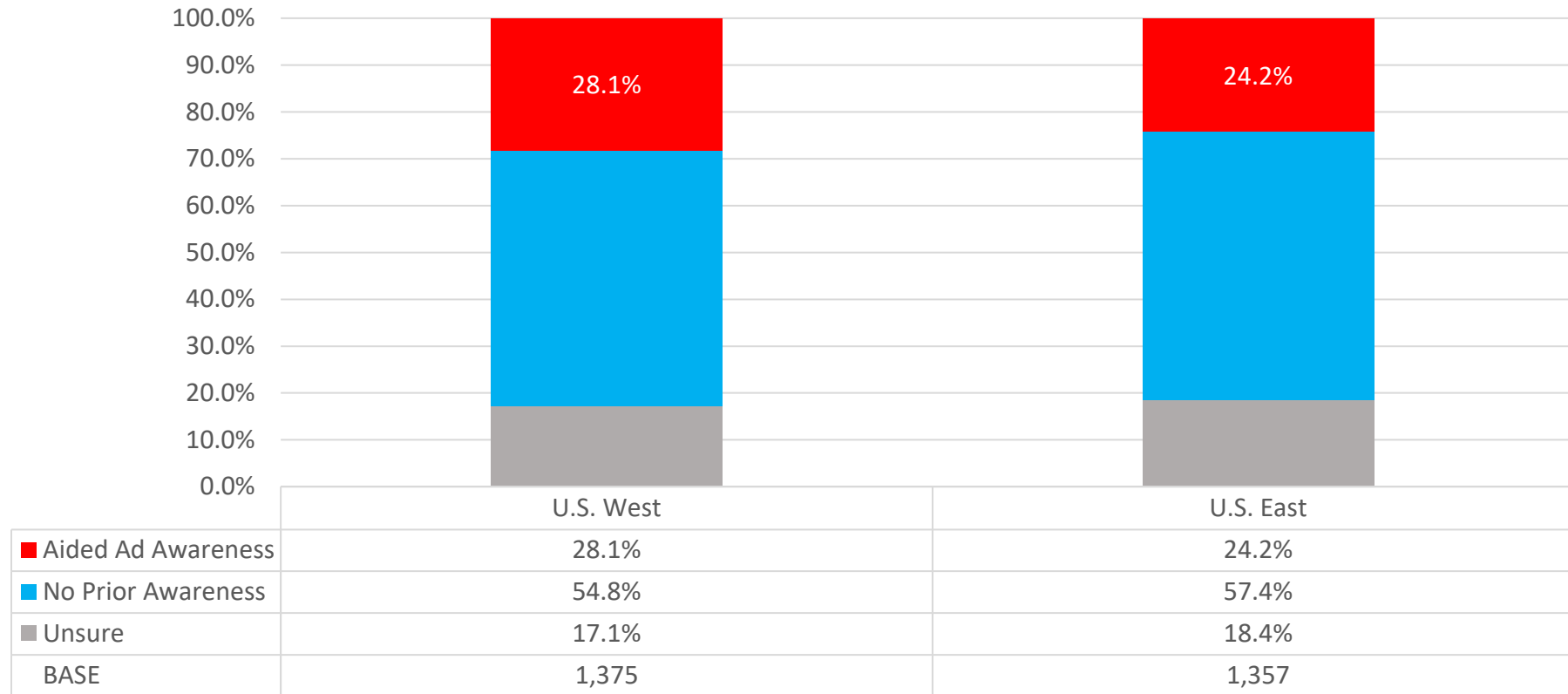


SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.5%	98.3%
Yes, needed assistance using 2 piece mask & snorkel	1.3%	1.5%
Yes, while snorkeling using a full face snorkel mask	0.2%	0.2%
BASE	466	417

Section – Island of Hawai'i

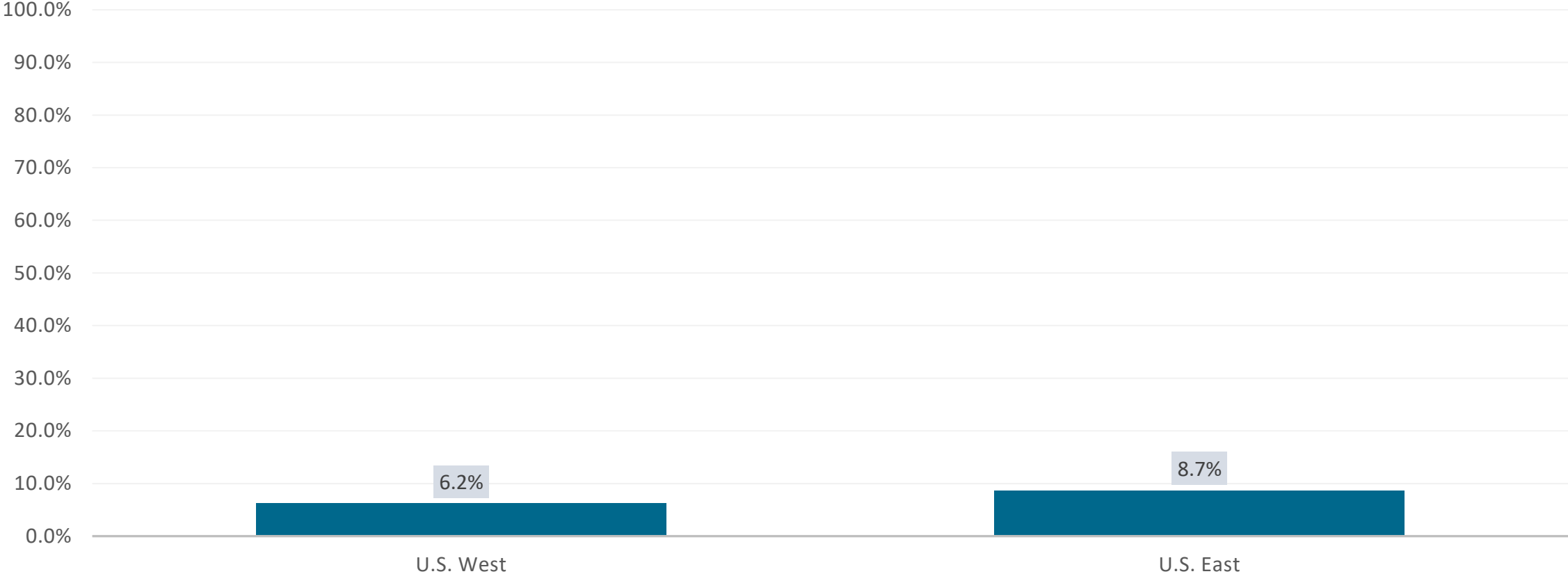
AIDED ADVERTISING AWARENESS ISLAND OF HAWAI'I



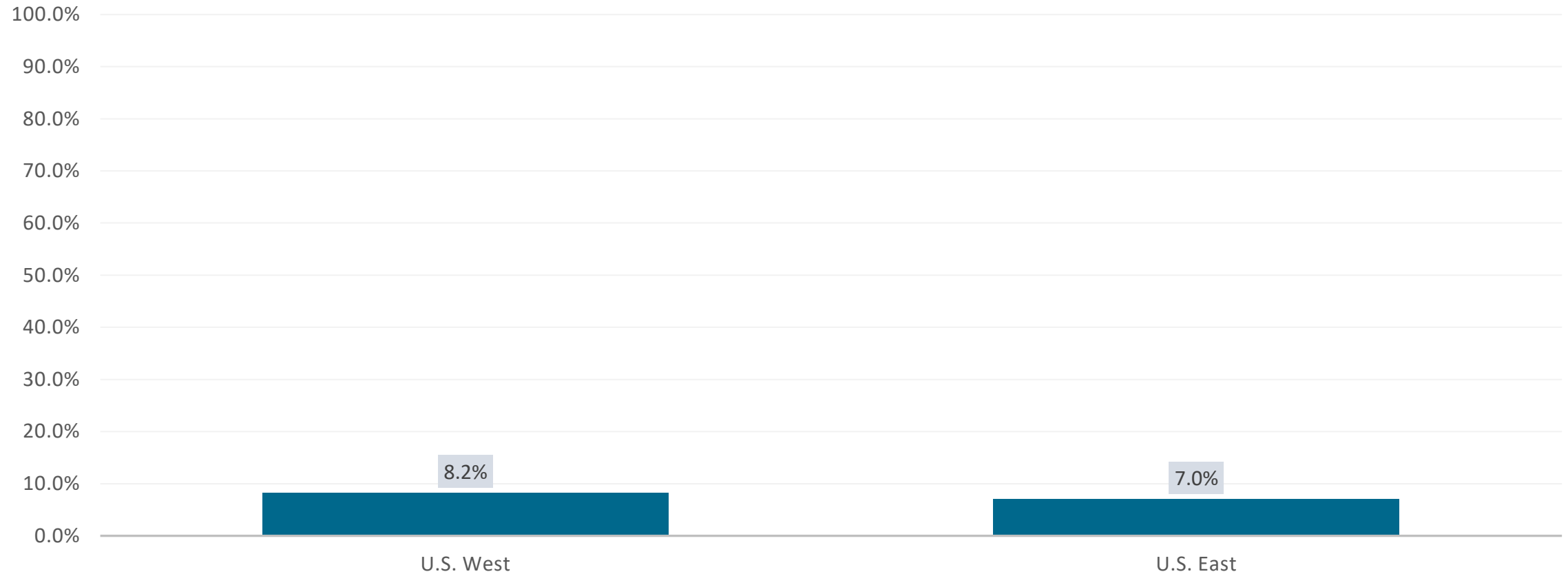
AIDED ADVERTISING AWARENESS ISLAND OF HAWAI'I

- **Islands visited:** Visitors from U.S. East who went to multiple islands were more likely to have been exposed to ads related to Hawai'i Island compared to those who stayed entirely on Hawai'i Island.
- **Age:** Amongst visitors from U.S. West, aided advertising awareness for Hawai'i Island was highest amongst senior respondents.

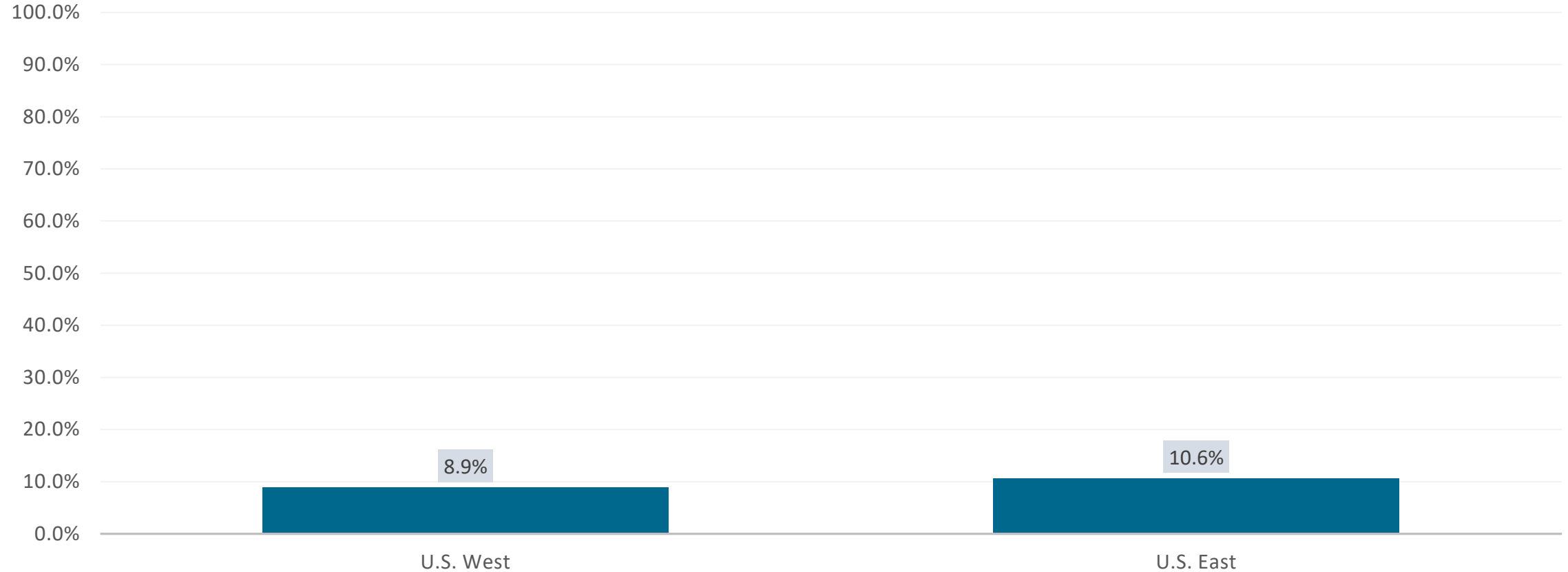
IMPACT OF LOCATION FILMING ISLAND OF HAWAI'I



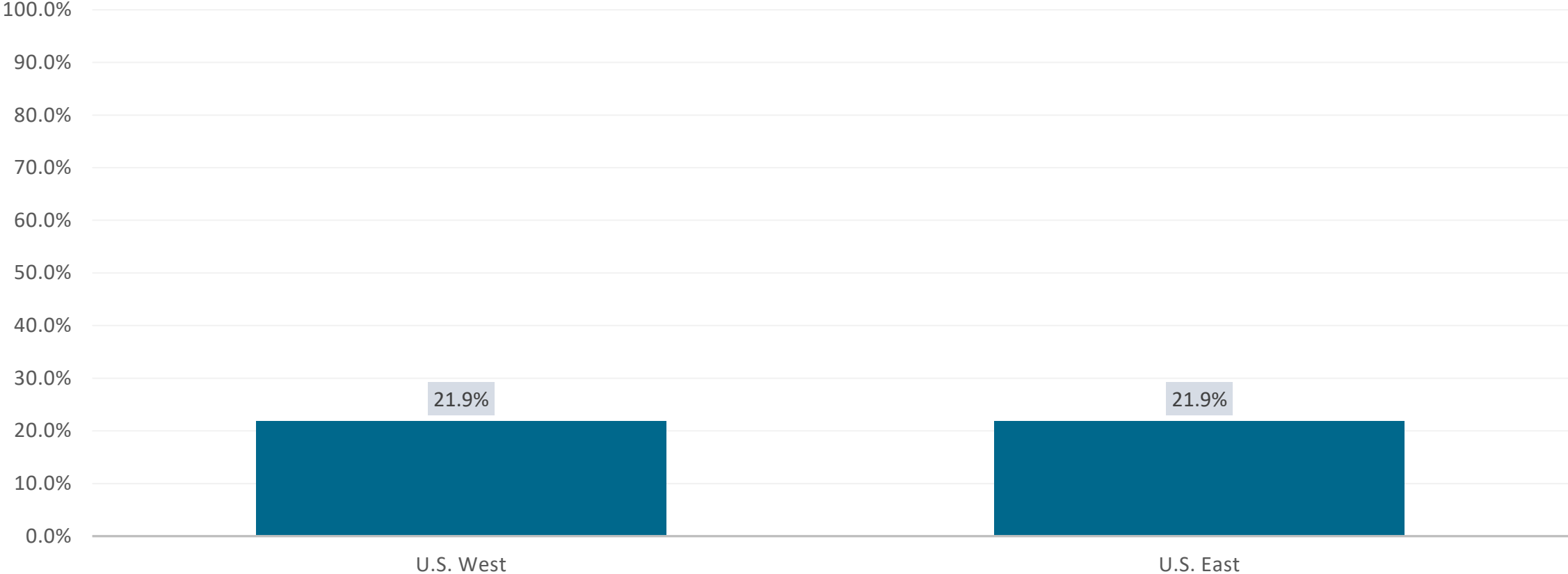
IMPACT OF HAWAIIAN MUSIC ISLAND OF HAWAI'I



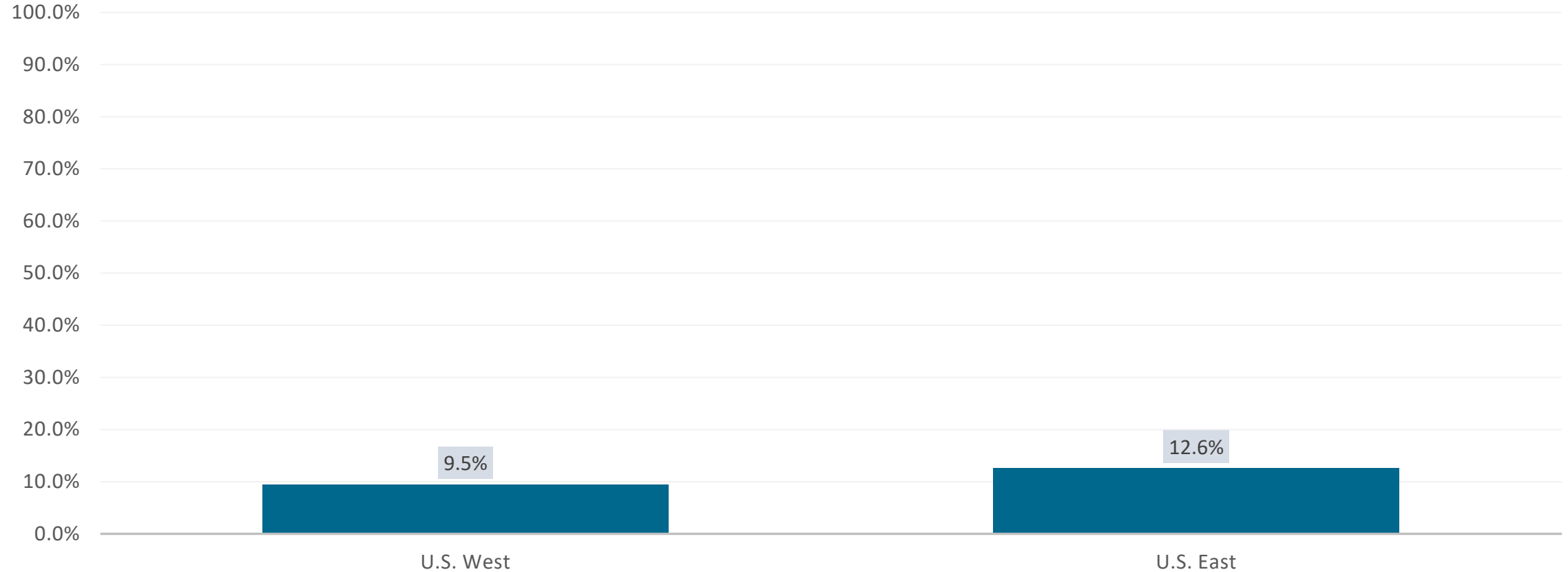
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS ISLAND OF HAWAI'I



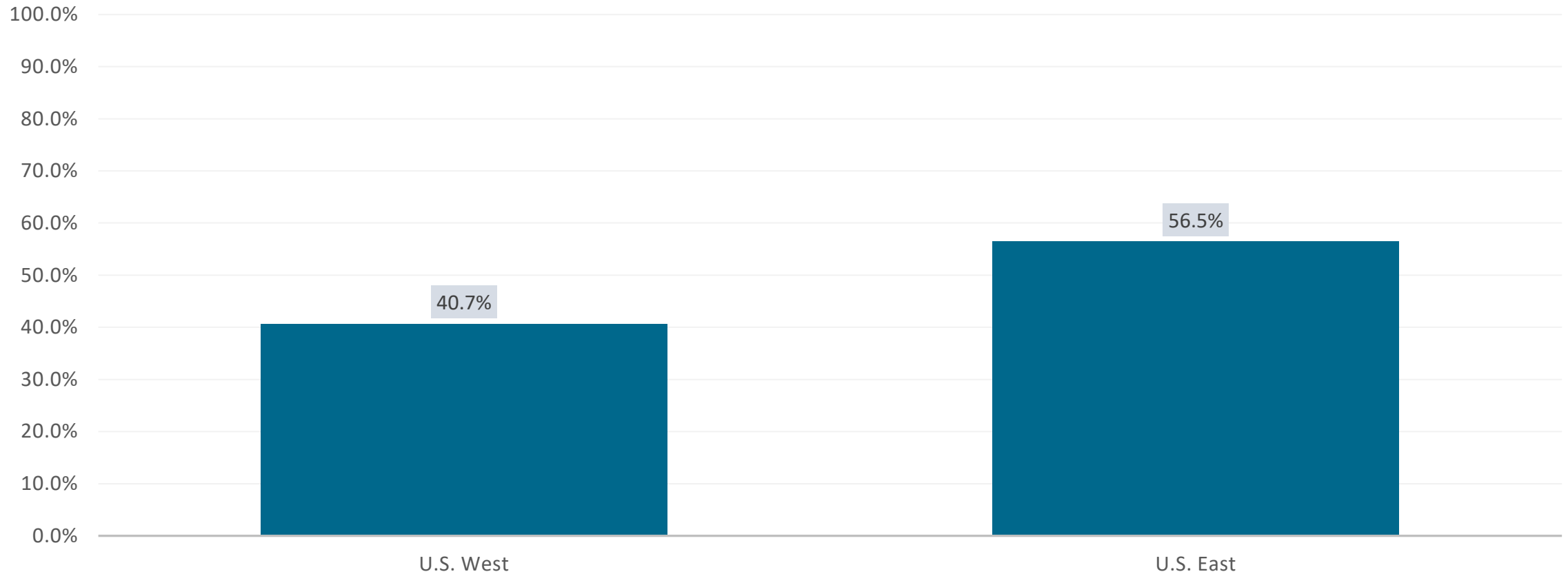
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - ISLAND OF HAWAI'I



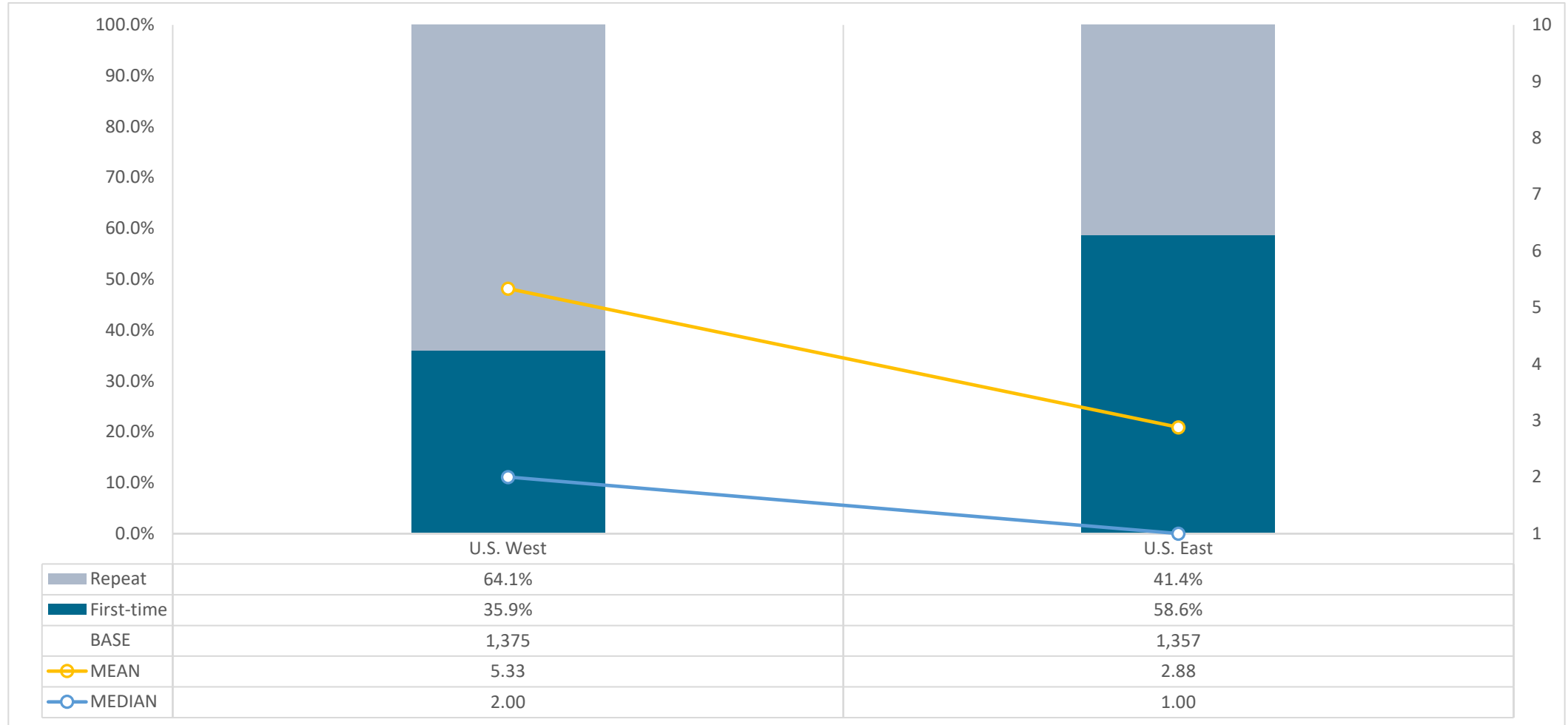
IMPACT OF HAWAIIAN CULTURAL EVENTS ISLAND OF HAWAI'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - ISLAND OF HAWAI'I



1st TIME VS REPEAT VISITOR - ISLAND OF HAWAI'I



1st TIME VS REPEAT VISITOR - ISLAND OF HAWAI'I

- **Age:** The average number of trips to Hawai'i Island increased amongst travelers as they got older. This trend was evident in both U.S. visitor markets.
- **Travel party size:** Visitors from U.S. West who came alone have visited Hawai'i Island the most, compared to those who were on their trip with other travel companions.
- **Household income:** Amongst visitors from U.S. West, the average number of trips to Hawai'i Island was highest amongst those in the upper income tier (\$150K+).

ACCOMMODATIONS - ISLAND OF HAWAI'I

	U.S. West	U.S. East
Hotel/ resort/ villa		
Vacation rental (includes AirBnB, VRBO, etc.)	29.1%	25.6%
Condominium/ apartment	18.7%	12.3%
Timeshare Unit	13.7%	14.4%
Stayed with friends or relatives	12.2%	9.9%
Rental House	5.0%	4.4%
Private Room in Private Home	3.0%	2.3%
Bed & Breakfast	2.2%	3.6%
Own property/ second home	2.4%	1.3%
Day trip/ Did not stay overnight	0.8%	2.3%
Shared Room/ Space in Private Home	1.3%	1.0%
Campsite, Beach	0.6%	1.0%
Hostel	0.4%	0.7%
Military housing/ accommodations		

ACCOMMODATIONS - ISLAND OF HAWAI'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	32.0%	33.1%
■ Residential Neighborhood	68.0%	66.9%
BASE	492	437

ACCOMMODATIONS - ISLAND OF HAWAI'I

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Location	38.5%	34.0%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	21.8%	16.0%
Price/ value/ best deal	16.0%	23.6%
Ability to have travel party members stay together	8.5%	9.0%
Owned by self, friend or relative	8.4%	7.4%
Recommendation from friends or family	3.5%	4.6%
Availability	2.2%	4.1%
No choice/ part of package	0.6%	0.5%

STRENGTHS/ POSITIVE ASPECTS ISLAND OF HAWAI'I

	U.S. West	U.S. East
Nature/ natural beauty/ scenery	23.5%	32.9%
Beach/ ocean	21.5%	12.5%
Variety of activities/ attractions/ many choices	16.2%	21.5%
Feeling of the "Aloha Spirit"	9.7%	8.5%
Friendliness of the local people	6.7%	5.5%
Events/ celebrations with friends/ family	5.0%	4.0%
Accommodations/ was as promised	3.0%	2.6%
Food/ restaurant variety/ dining options	3.0%	2.0%
Overall customer service/ hospitality/ the people	2.3%	2.1%
Local culture/ people/ music	1.9%	2.5%
Accommodations/ cleanliness/ upkeep	1.5%	0.7%
Food/ restaurant/ good service	0.8%	0.6%
Accommodations/ good service from staff	0.8%	0.4%

STRENGTHS/ POSITIVE ASPECTS ISLAND OF HAWAI'I

- **Education:** Visitors from U.S. West with a college degree were more likely to identify Hawai'i Island's natural beauty as a driver of trip satisfaction than visitors without a degree. College graduates from U.S. West were also more impacted by the variety of attractions and activities.
- **Age:** Younger visitors from U.S. West (<35 years old) were more impacted positively by Hawai'i Island's natural beauty.
- **Gender:** Female respondents from both U.S. visitor markets listed the "aloha spirit" in higher proportions than male respondents when asked to identify drivers of trip satisfaction. Male visitors from U.S. East mentioned the island's natural beauty in higher numbers.
- **Household income:** More affluent visitors from U.S. West were more positively impacted by the "aloha spirit" compared to less affluent visitors.
- **Islands visited:** Visitors from U.S. West and U.S. East whose trip was spent entirely on Hawai'i Island were more likely to list the beach and ocean as a satisfaction driver. Conversely those who visited multiple islands during their trip were more likely to name the island's natural beauty as a driver of trip satisfaction.
- **Trips to Hawai'i:** First-time visitors to Hawai'i Island from U.S. West were more positively impacted by the island's natural beauty and the variety of activities. Repeat visitors from U.S. West were more likely to list the beach and ocean as a driver of trip satisfaction.

AREAS OF OPPORTUNITIES - ISLAND OF HAWAI'I

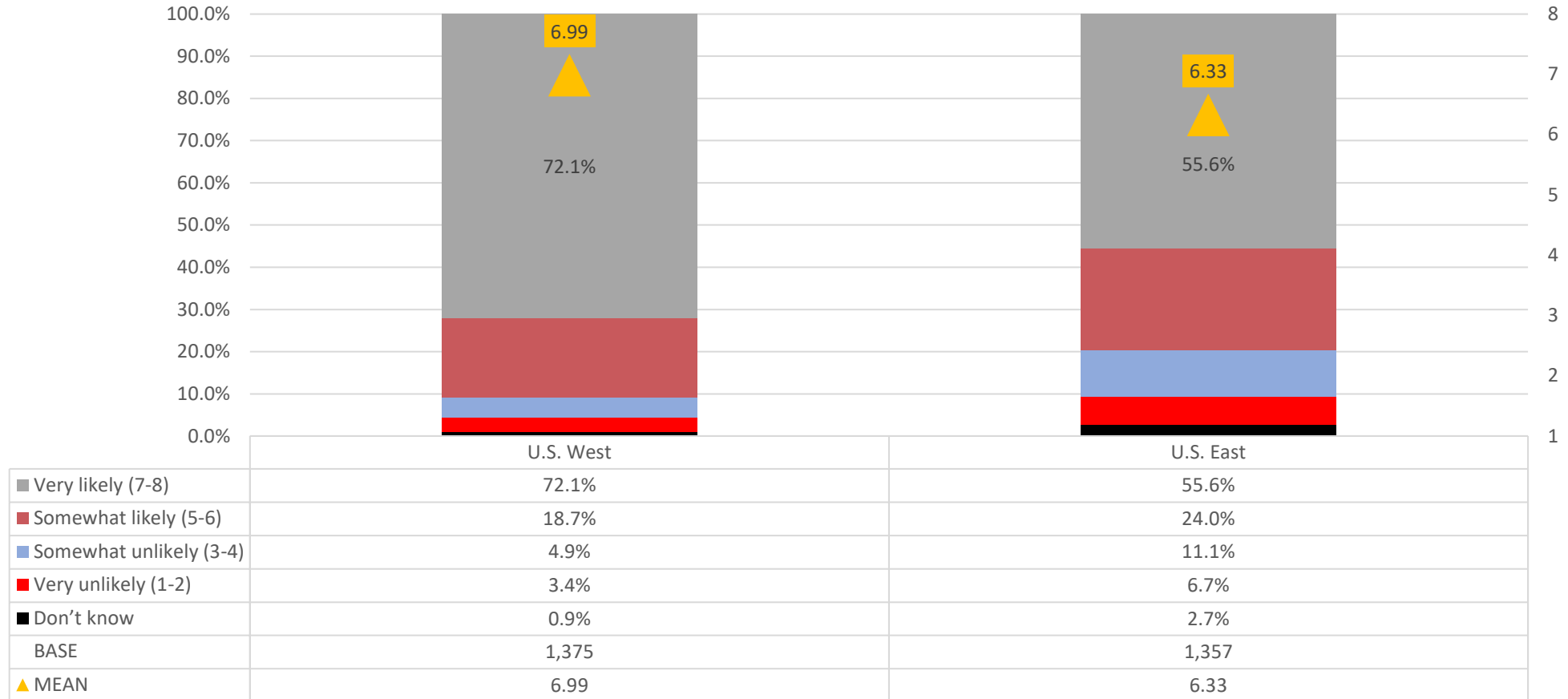
	U.S. West	U.S. East
No negatives/ everything was great	39.7%	39.5%
Food/ restaurant variety/ dining options	10.7%	9.8%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	7.2%	8.3%
Coronavirus / COVID 19 pandemic	6.5%	6.6%
Would like to experience more local culture	5.9%	6.9%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	5.6%	5.9%
Traffic (congested/slow)	4.9%	3.6%
Food/ restaurant quality	2.7%	2.9%
Variety of activities/ attractions	2.2%	2.1%

AREAS OF OPPORTUNITIES - ISLAND OF HAWAI'I

- **Education:** Respondents from both U.S. visitor markets without a college degree were less likely to identify any aspect of their stay on Hawai'i Island that they took issue with.
- **Age:** The availability of ground transportation was also a concern for younger respondents from both U.S. visitor markets.
- **Gender:** Male visitors from U.S. West listed traffic more often as an inconvenience during their stay than females from this visitor market. Conversely, female visitors from U.S. West were less likely to identify issues with their stay than male visitors.
- **Household income:** More affluent respondents from both U.S. visitor markets were more likely to have had issues regarding the lack of variety in restaurant and dining options on island as well as having a negative rental car experience overall.
- **Trips to Hawai'i:** First-time visitors from U.S. East were more likely to have complaints related to their rental car experience than repeat visitors. Disappointment in the ability to experience more of the local culture was also more of an issue for first-time visitors.

LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

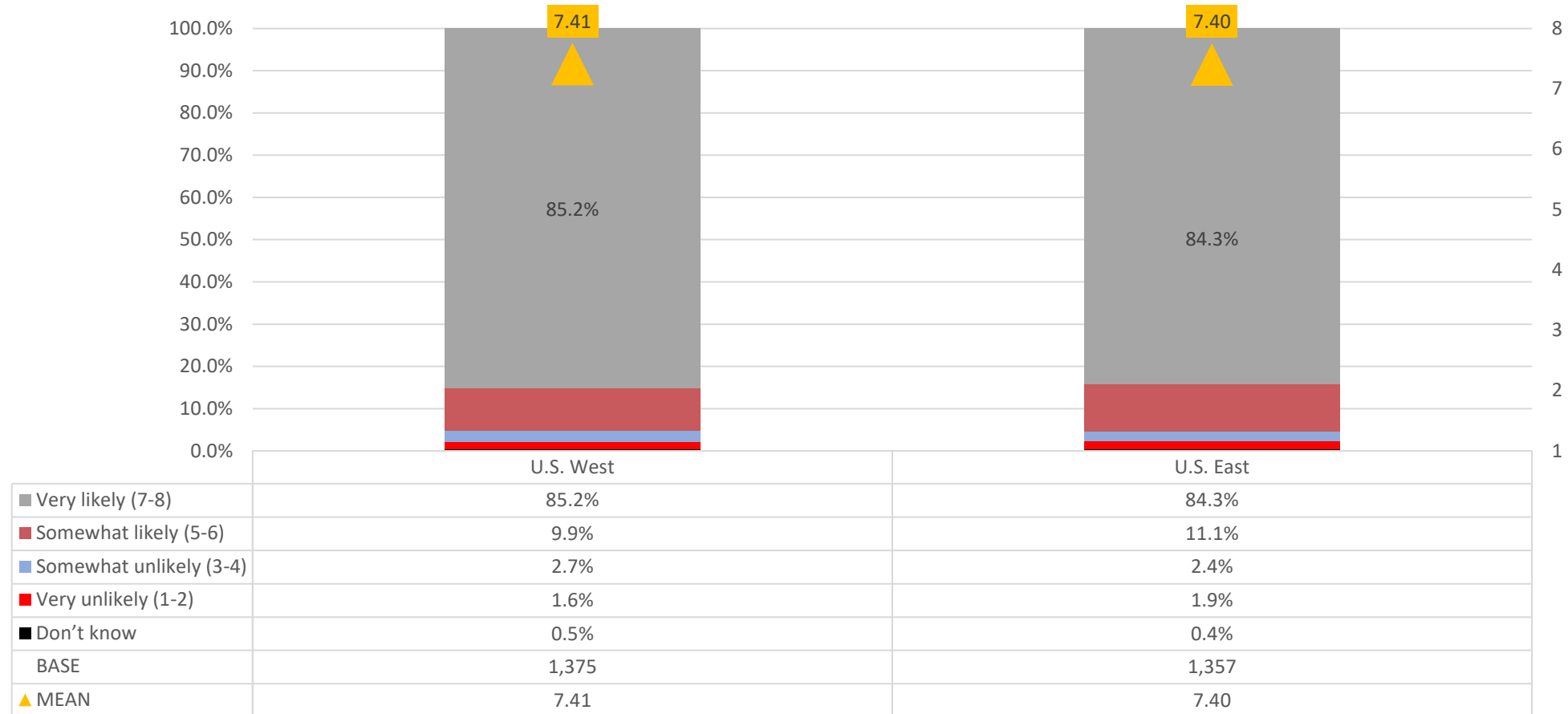
- **Education:** Visitors from U.S. East without a college degree expressed a stronger likelihood to return compared to those with a college degree.
- **Age:** Amongst visitors from U.S. West, the likelihood of return was highest amongst visitors between the ages of 50-64.
- **Trips to Hawai'i:** Respondents from both U.S. visitor markets who stayed entirely on Hawai'i Island expressed a stronger likelihood to return compared to those who visited multiple islands.
- **Travel party size:** Respondents from both U.S. visitor markets who came alone were more likely to return to Hawai'i Island than those who came with others in their travel party.

REASONS FOR NOT RETURNING ISLAND OF HAWAI'I

	U.S. West	U.S. East
Want to go someplace new	57.3%	52.0%
Too expensive/cost	9.5%	22.8%
No reason to return/ nothing new	17.8%	10.4%
Flight too long	1.5%	18.1%
Coronavirus / COVID 19 pandemic	12.4%	5.7%
Unfriendly people/ felt unwelcome	6.3%	6.5%
Not enough value for the price	4.8%	6.9%
Other financial obligations	2.7%	8.9%
Nothing to do/ boring	6.3%	2.9%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	2.3%	3.6%
Poor service	2.7%	2.5%

BRAND/ DESTINATION ADVOCACY ISLAND OF HAWAI'I

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



BRAND/ DESTINATION ADVOCACY ISLAND OF HAWAI'I

- **Islands visited:** Visitors from U.S. West who stayed entirely on Hawai'i Island gave higher brand advocacy scores compared to those whose trip also included stays on other islands.
- **Gender:** Female respondents from U.S. West gave higher mean advocacy scores than male respondents.

ISLAND OF HAWAI'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	95.5%	97.2%
On own (self guided)	86.9%	87.8%
Helicopter/ airplane	3.1%	6.5%
Boat/ submarine/ whale	26.4%	32.9%
Visit towns	53.8%	57.4%
Limo/ van/ bus tour	4.1%	10.7%
Scenic views/ natural landmark	61.9%	73.0%
Movie/ TV/ film location	0.8%	1.0%

ISLAND OF HAWAI'I ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	85.5%	85.9%
Bodyboard	15.3%	10.6%
Stand up paddle board	8.0%	5.8%
Surfing	4.1%	4.5%
Canoeing/ kayak	10.7%	8.1%
Swim ocean	72.1%	69.2%
Snorkel	61.6%	57.5%
Freediving	2.9%	1.9%
Windsurf/ Kitesurf	0.1%	0.2%
Jet ski/ Parasail	1.4%	1.7%
Scuba	3.9%	4.6%
Fishing	5.1%	5.1%
Golf		

ISLAND OF HAWAI'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	32.9%	28.3%
Spa	9.0%	7.5%
Hiking	49.9%	63.3%
Backpack/Camping	1.3%	2.8%
Agritourism	12.6%	18.8%
Sport event/ tournament	1.1%	0.6%
Park/ botanical garden	35.9%	48.5%
Waterpark	0.8%	1.4%
Mountain tube/ waterfall rappel	0.4%	0.4%
Zip lining	3.7%	3.1%
Skydiving	0.6%	0.4%
All terrain vehicle (ATV)	2.9%	3.0%
Horseback riding		

ISLAND OF HAWAI'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.3%	99.3%
Lunch/ sunset/ dinner/ evening cruise	18.7%	20.8%
Live music/ stage show	19.0%	26.0%
Nightclub/ dancing/ bar/ karaoke	5.6%	5.9%
Fine dining	51.0%	47.3%
Family restaurant	60.9%	59.5%
Fast food	30.4%	33.1%
Food truck	18.2%	24.5%
Café/ coffee house	49.6%	52.8%
Ethnic dining	24.9%	29.4%
Prepared own meal	66.9%	56.1%

ISLAND OF HAWAI'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	96.9%	96.5%
Mall/ department store	24.0%	22.4%
Designer boutique	12.3%	13.8%
Hotel/ resort store	28.2%	32.7%
Swap meet/ flea market	10.9%	12.2%
Discount/ outlet store	9.1%	9.9%
Supermarket	76.2%	68.5%
Farmer's market	55.6%	51.0%
Convenience store	39.9%	44.7%
Duty free store	1.1%	1.5%
Local shop/ artisan	62.8%	68.0%

ISLAND OF HAWAI'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	62.0%	71.5%
Historic military site	6.6%	13.0%
Historic Hawaiian site	37.7%	45.4%
Other historical site	14.7%	16.1%
Art museum	2.0%	2.0%
Art galleries/ exhibitions	9.3%	8.9%
Luau/ Polynesian show/ hula show	15.3%	25.3%
Lesson ex. ukulele, hula, canoe, lei making	2.4%	4.1%
Play/ concert/ theatre	0.9%	1.0%
Art/ craft fair	10.1%	8.7%
Festival event	2.2%	1.7%

ISLAND OF HAWAI'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	91.3%	93.3%
Airport shuttle	13.2%	14.4%
Trolley	0.3%	1.3%
Public bus	0.5%	1.3%
Tour bus/ tour van	3.4%	9.3%
Taxi/ limo	6.3%	8.5%
Rental car	85.0%	86.0%
Ride share	6.4%	9.3%
Bicycle rental	2.3%	1.8%

ISLAND OF HAWAI'I ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	33.4%	26.2%
Visit friends/ family	32.5%	25.2%
Volunteer non profit	1.2%	1.4%

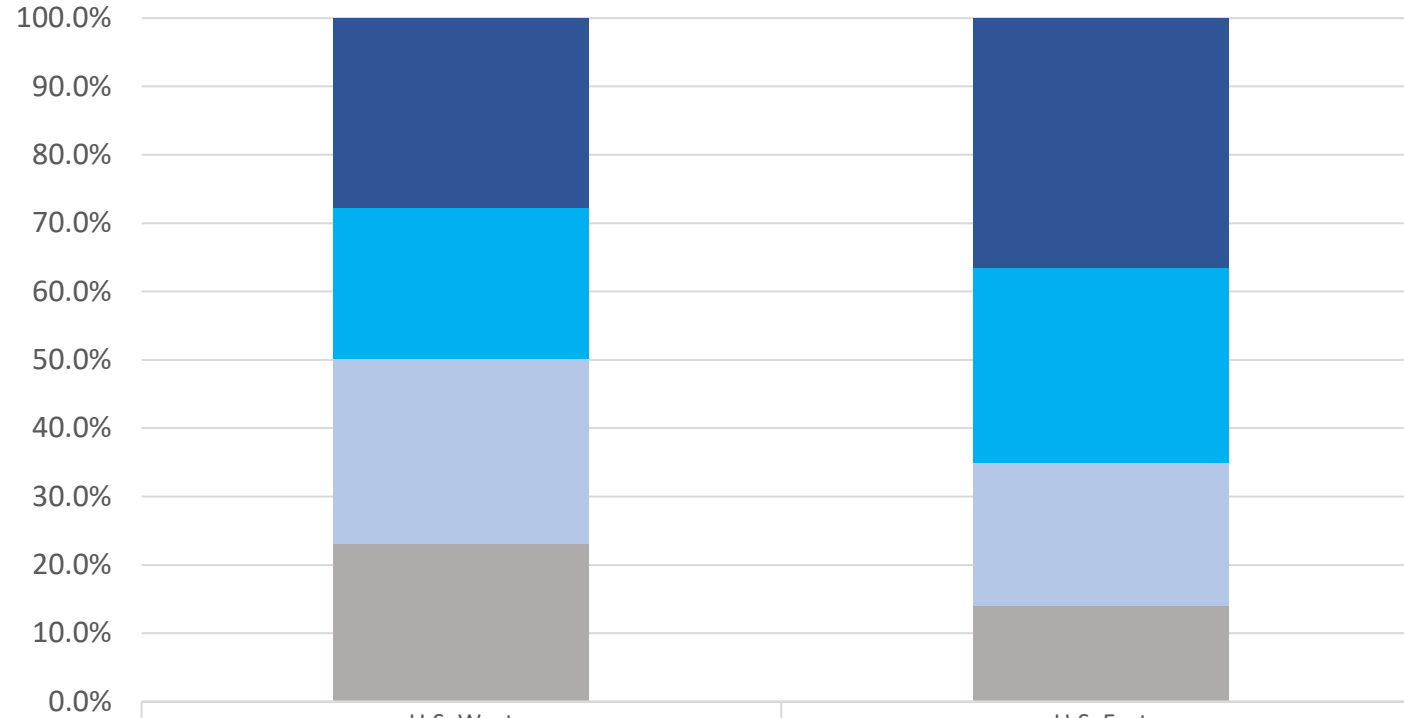
ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East
'Akaka Falls		
Botanical Gardens	13.5%	17.7%
H.N. Greenwell Store	3.4%	5.4%
Hawai'i Volcanoes National Park	52.2%	71.3%
Hilo Farmers Market	26.6%	25.9%
Hulihe'e Palace	3.2%	3.8%
'Imiloa Astronomy Ctr	1.1%	1.5%
Kaloko Honokohau National Historical Park	9.9%	12.0%
Kona Coffee Living History Farm	9.4%	12.4%
Lili'uokalani Park and Gardens		

ATTRACTIONS- ISLAND OF HAWAI'I

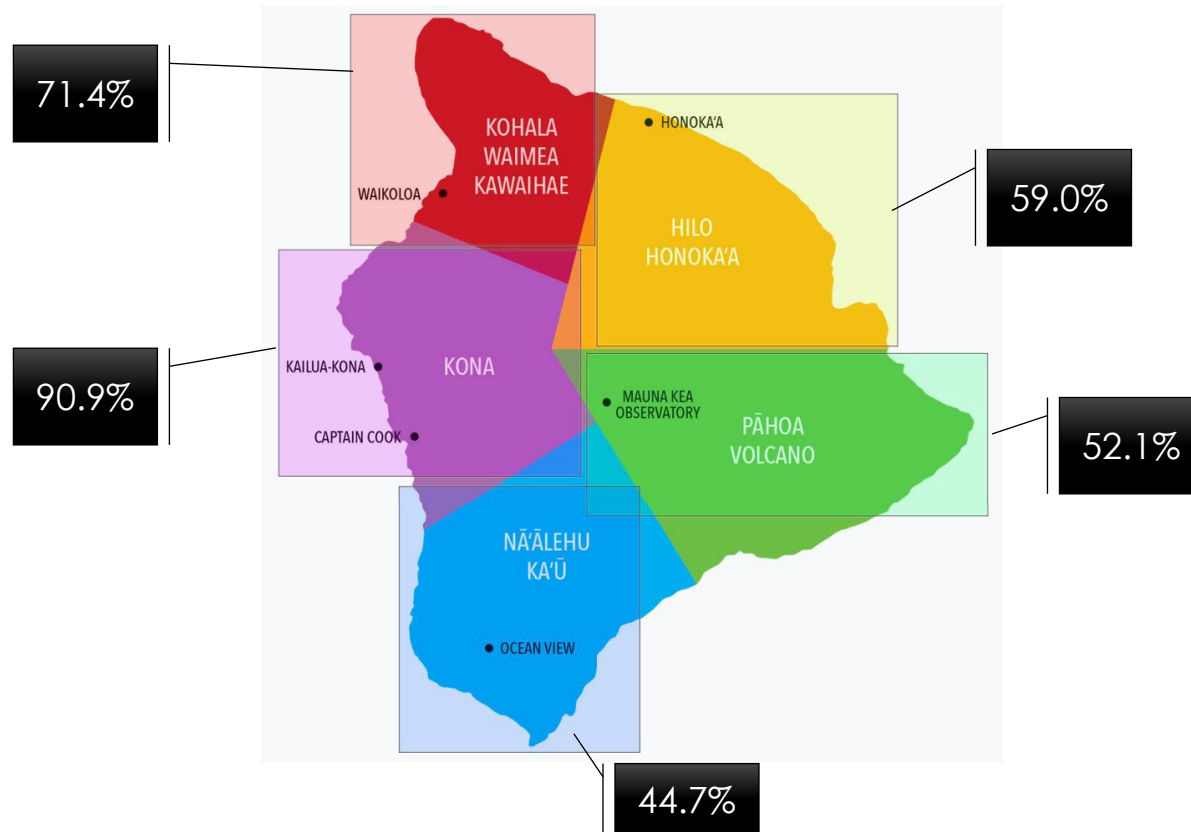
	U.S. West	U.S. East
Lyman House Memorial Museum		
Maunakea	17.2%	25.6%
Orchid Farm	2.0%	2.5%
Pacific Tsunami Museum	1.3%	1.3%
Pana'ewa Rainforest Zoo & Gardens	1.6%	1.8%
Pu'uhonua o Honaunau National Historical Park	21.1%	24.6%
Pu'ukohola Heia National Historical Site	10.6%	11.6%
Punalu'u Black Sand Beach	34.4%	44.0%
Rainbow Falls	27.1%	41.0%
Volcano Art Center		

TRAVEL ON ISLAND OF HAWAI'I

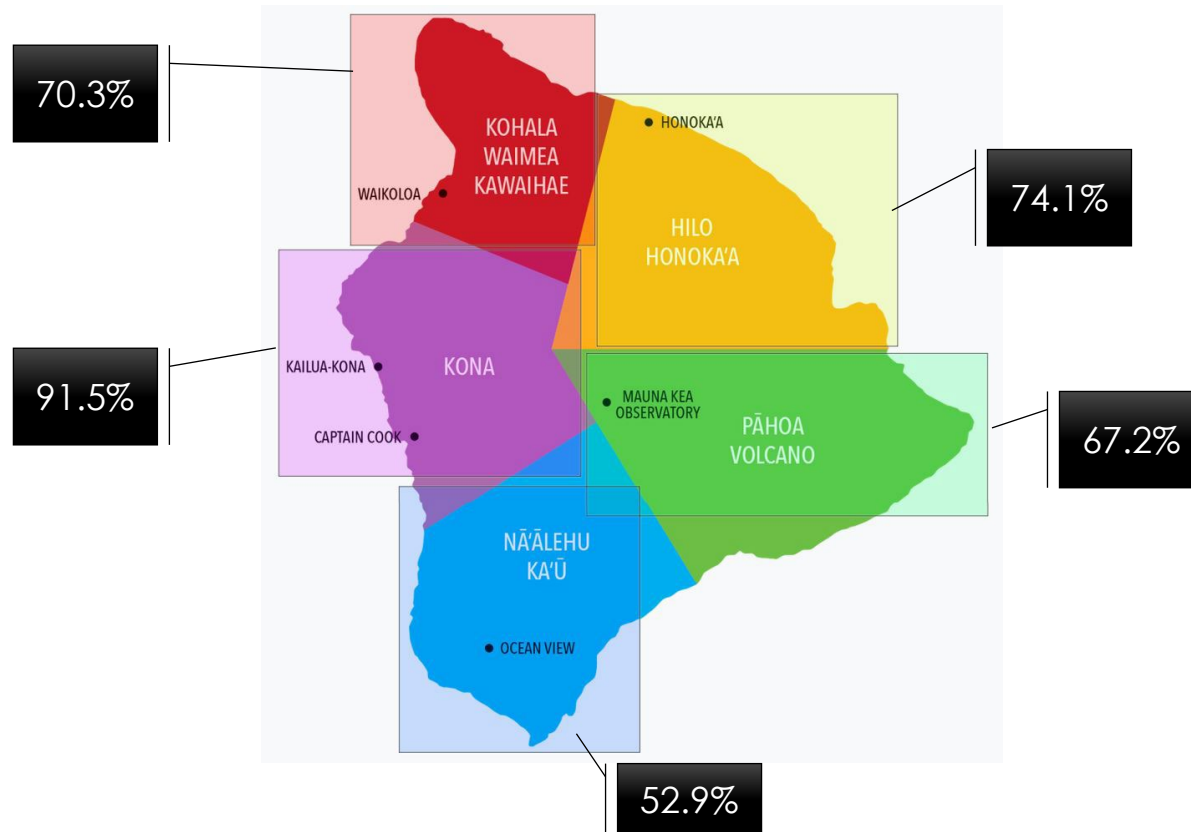


	U.S. West	U.S. East
Traveled to other side of island	27.7%	36.6%
Traveled more than 1 hour one way to reach activities	22.1%	28.4%
Traveled 1 hour or less one way to reach activity	27.1%	20.9%
Enjoy activities- short drive from accommodations	23.1%	14.1%
BASE	1,375	1,357

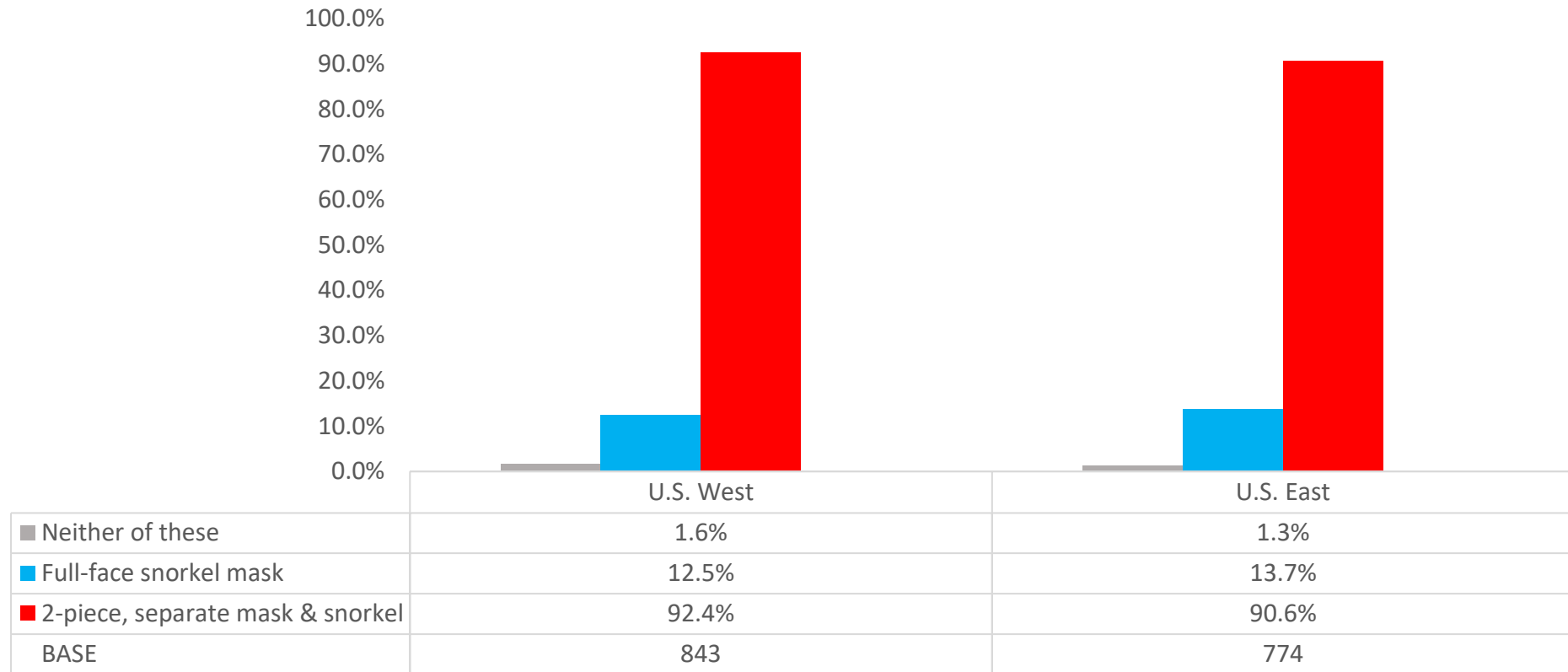
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



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



SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I

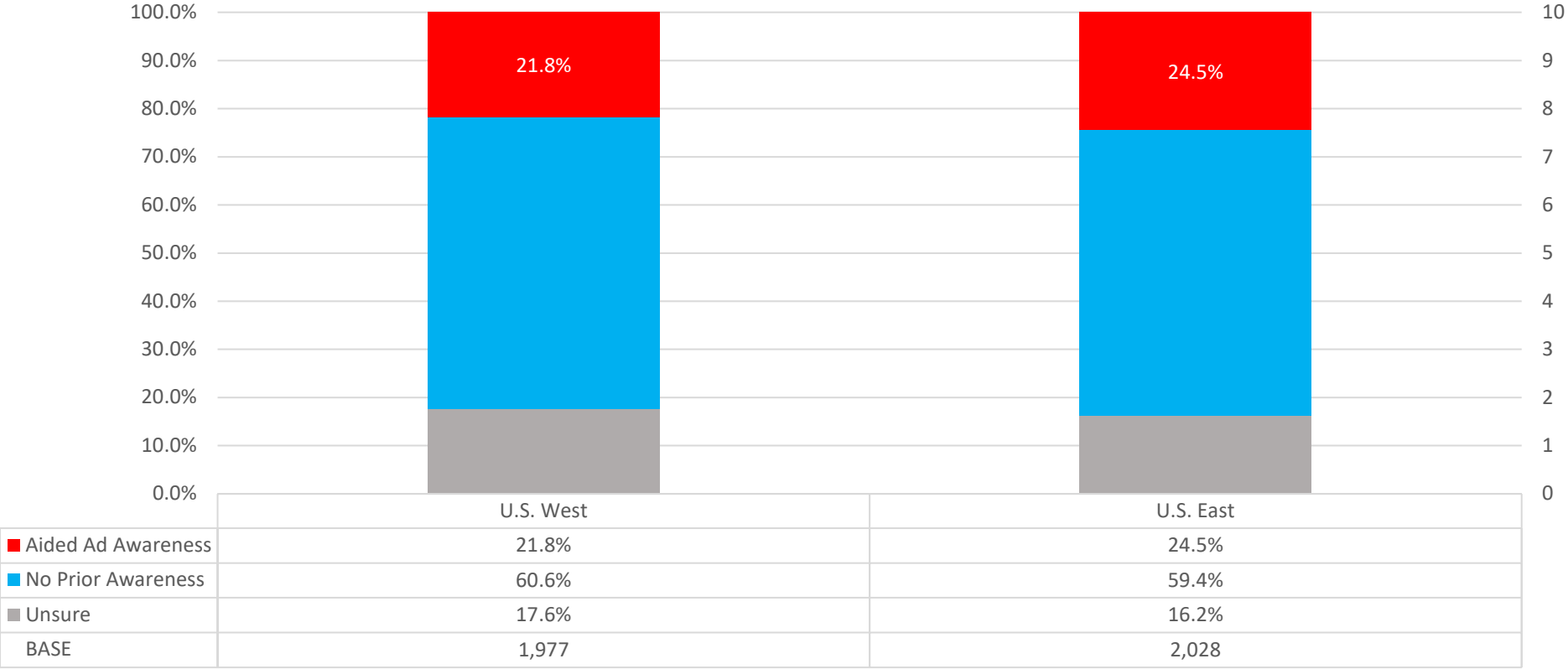


SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.8%	98.6%
Yes, needed assistance using 2 piece mask & snorkel	1.2%	1.2%
Yes, while using a full face snorkel mask	0.0%	0.2%
BASE	829	764

Section – Maui

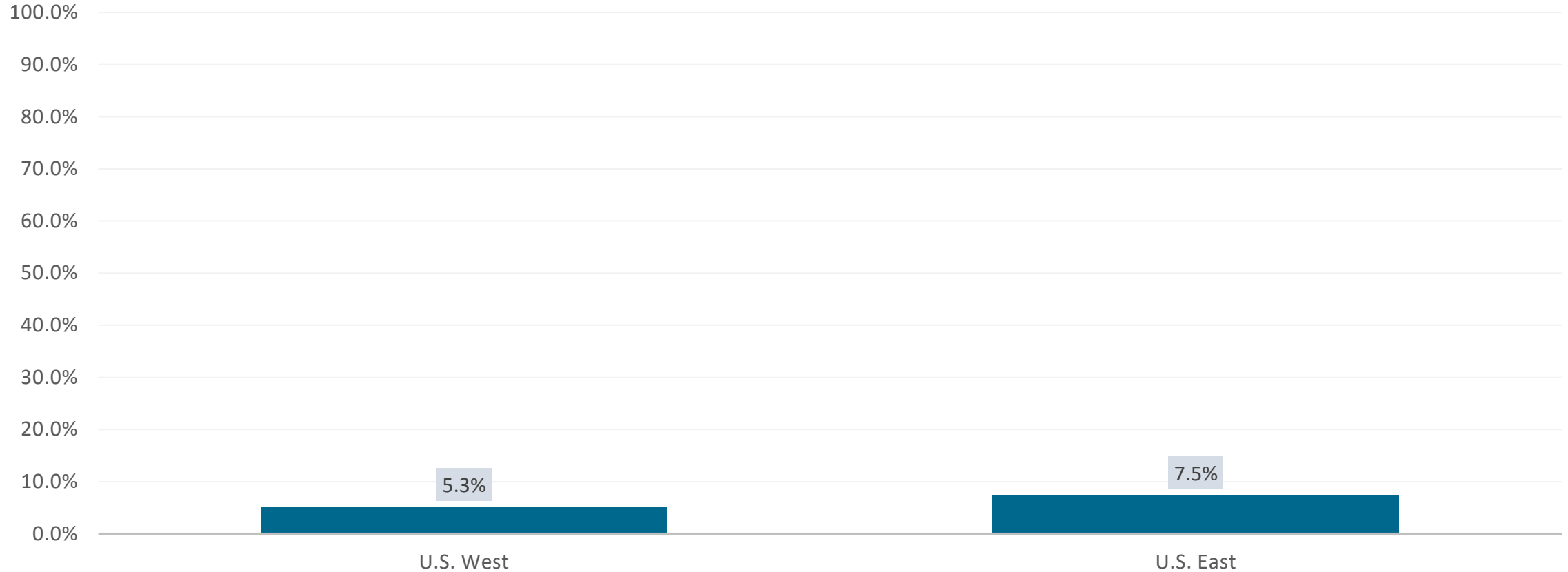
AIDED ADVERTISING AWARENESS - MAUI



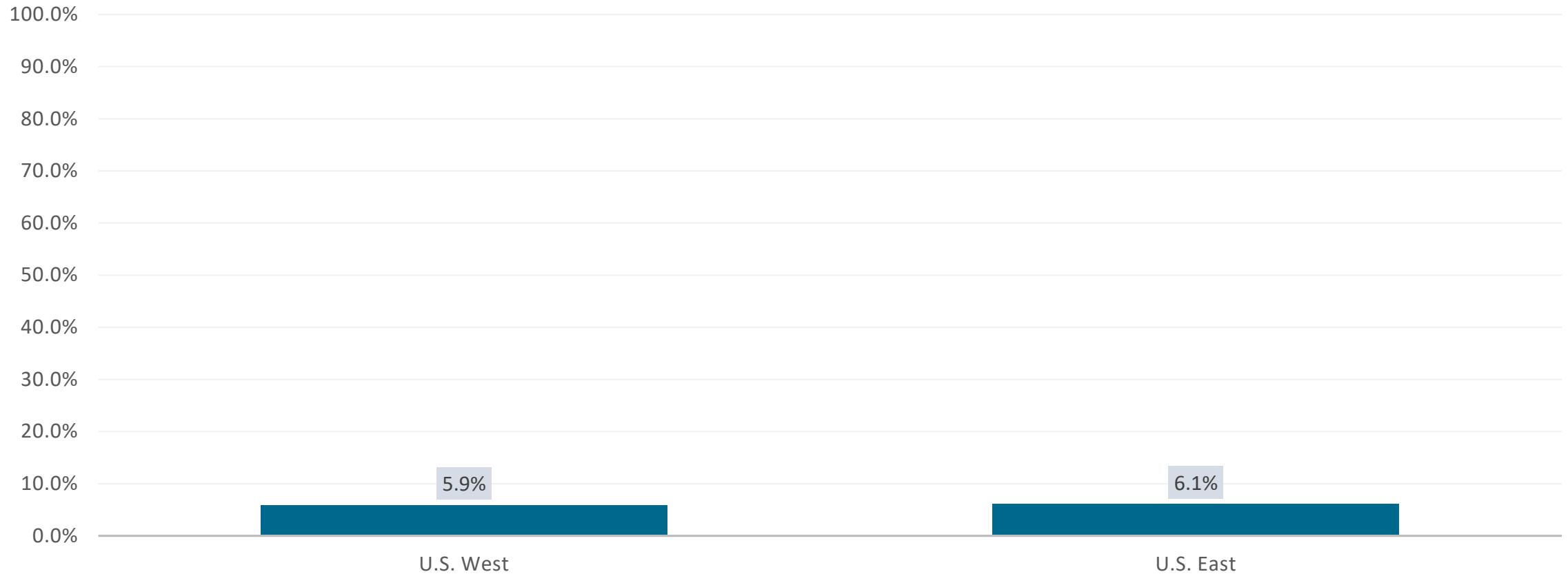
AIDED ADVERTISING AWARENESS - MAUI

- **Education:** Visitors from U.S. East without a college degree were more likely to have been exposed to advertising related to Maui compared to visitors with a college degree.
- **Age:** Aided advertising awareness for Maui was higher amongst older respondents from both U.S. visitor markets, more specifically, those 50 and older.
- **Islands visited:** Visitors from both U.S. markets who went to multiple islands were more likely to have been exposed to advertising related to Maui compared to those who stayed entirely on Maui.

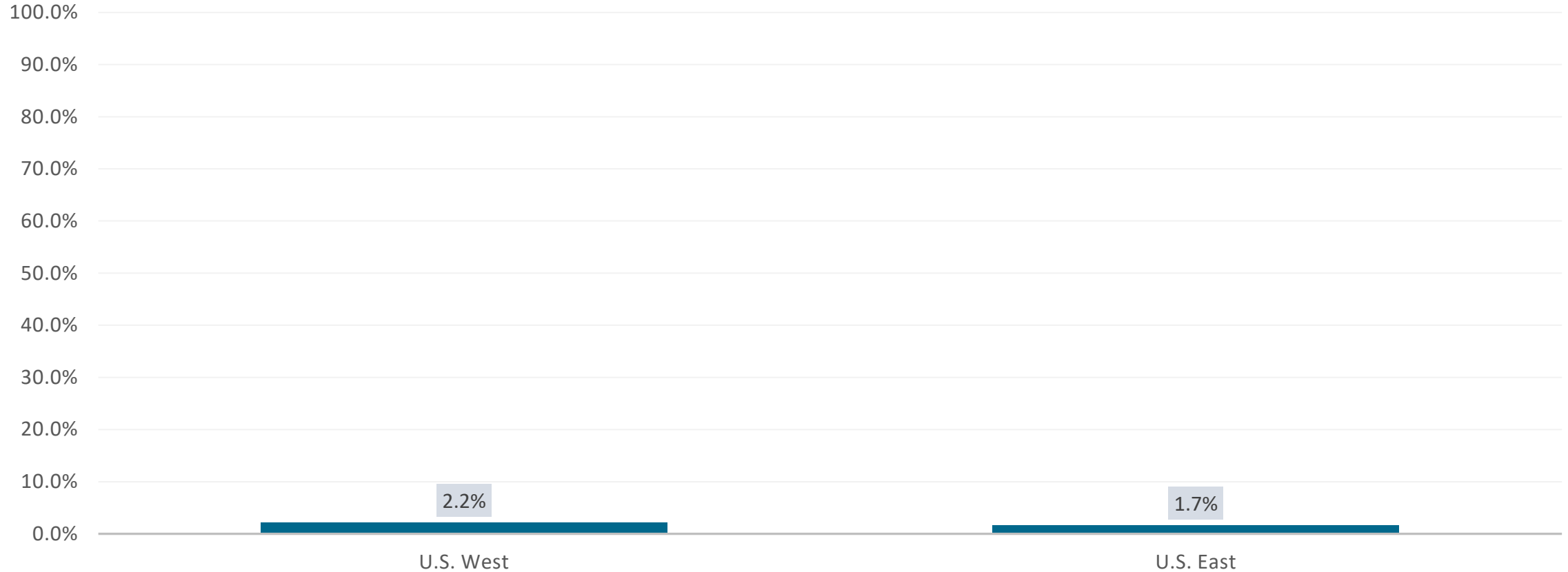
AIDED ADVERTISING AWARENESS SENTRY GOLF TOURNAMENT



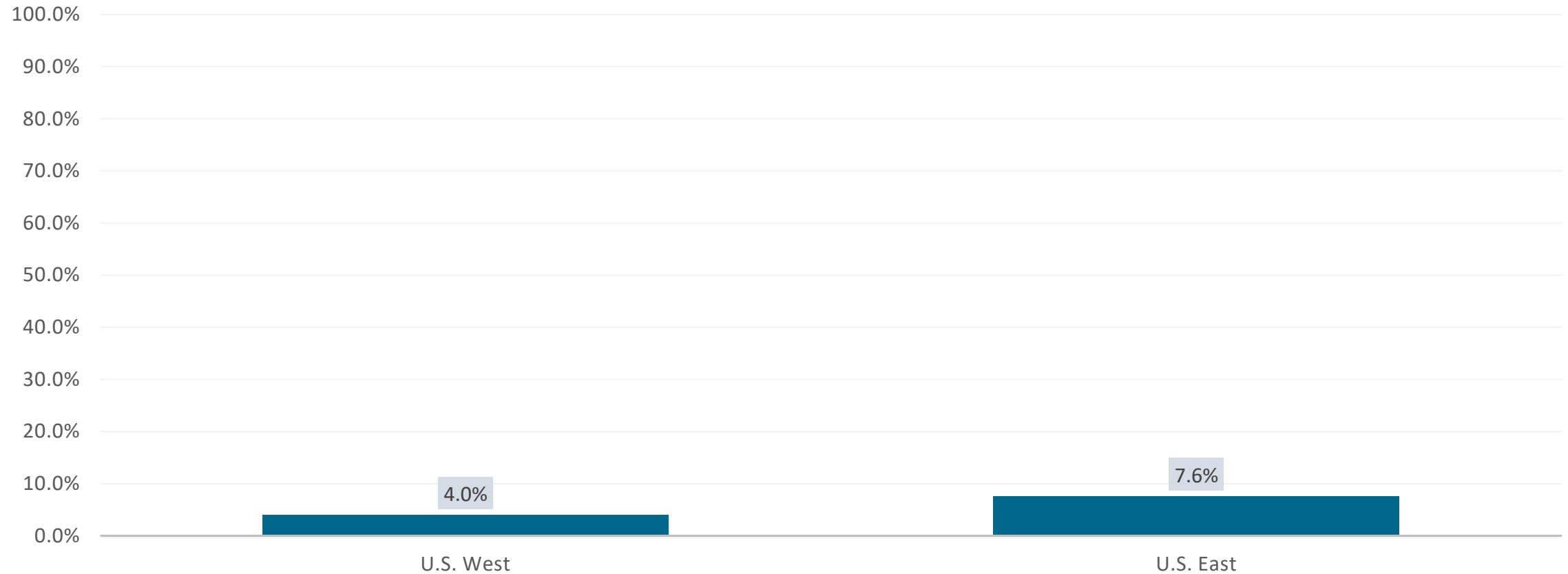
AIDED ADVERTISING AWARENESS MAUI JIM INVITATIONAL



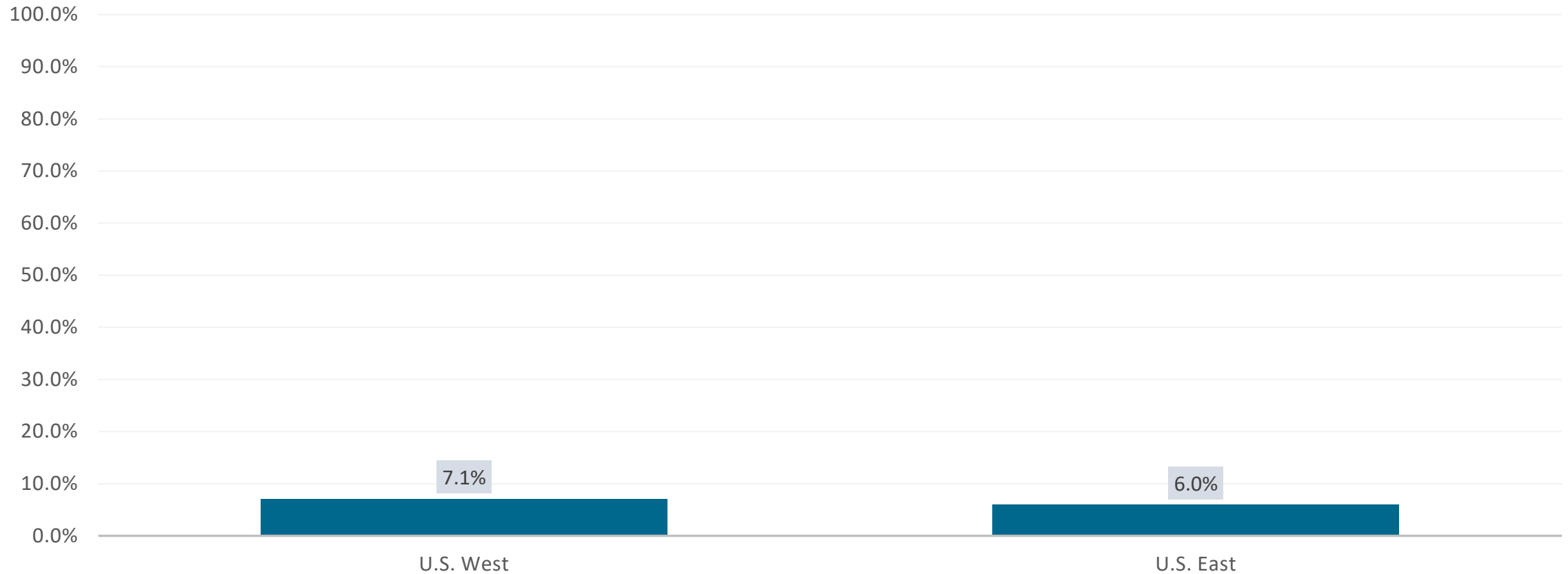
AIDED ADVERTISING AWARENESS XTERRA



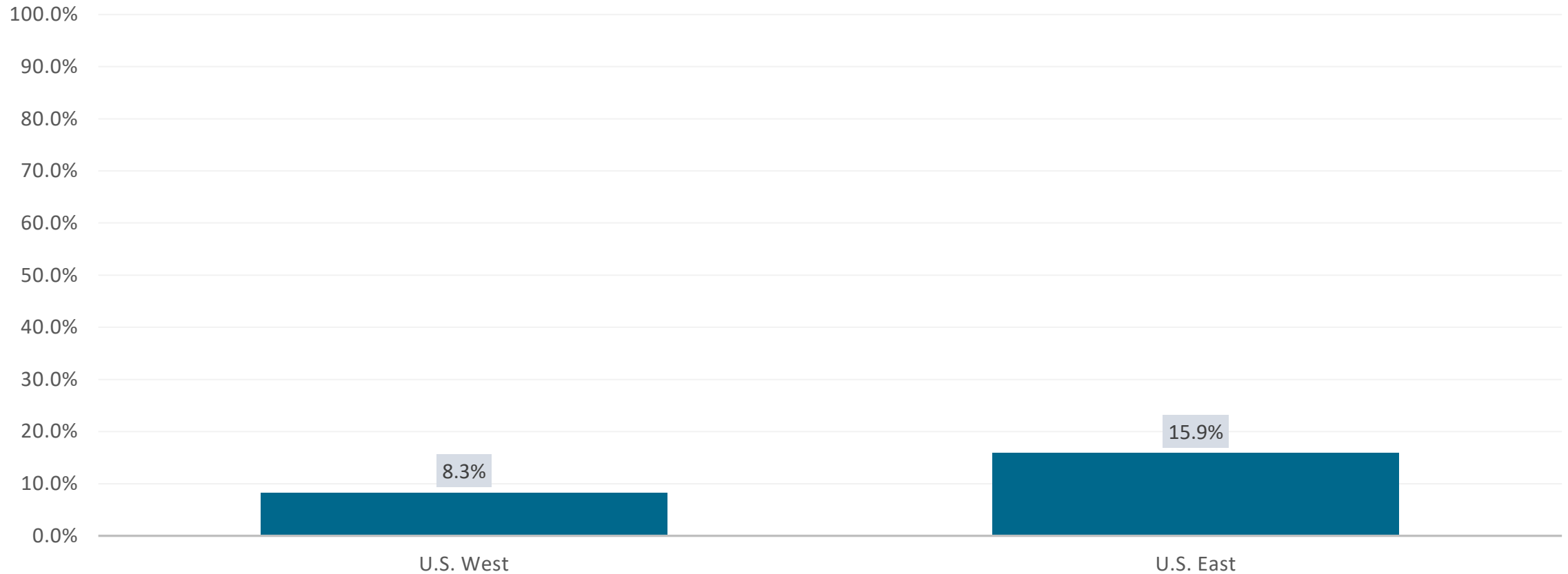
IMPACT OF LOCATION FILMING - MAUI



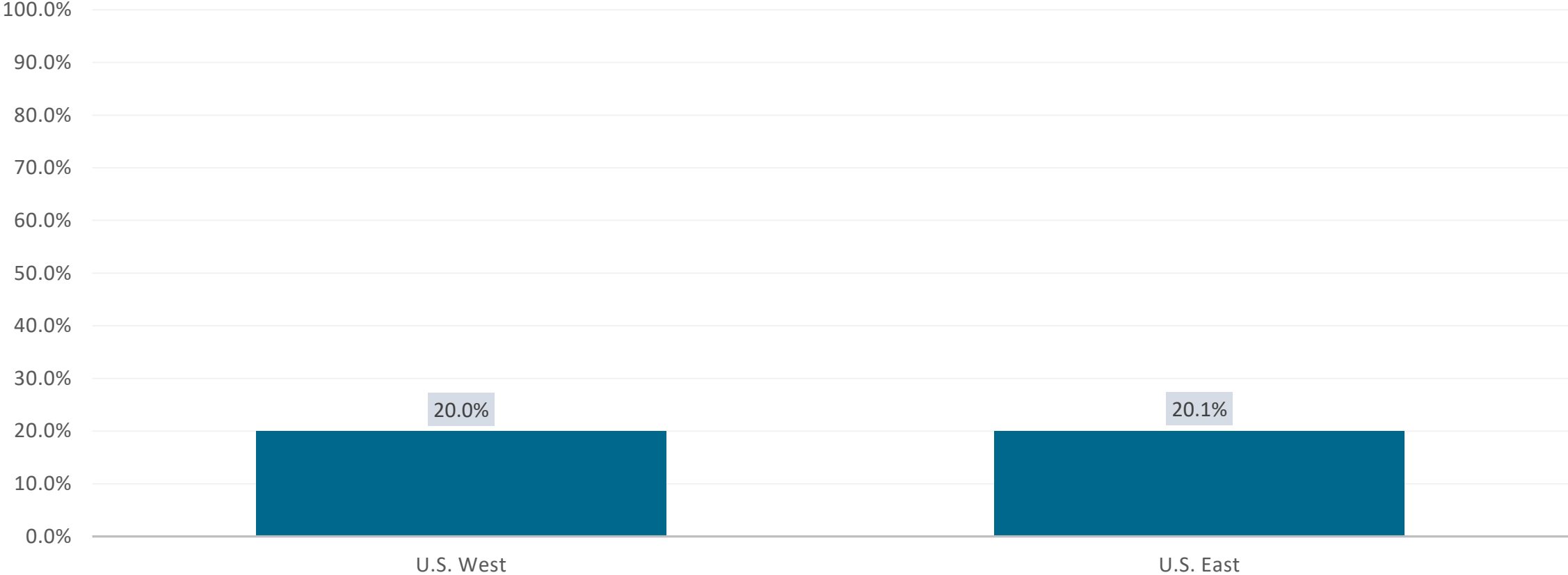
IMPACT OF HAWAIIAN MUSIC- MAUI



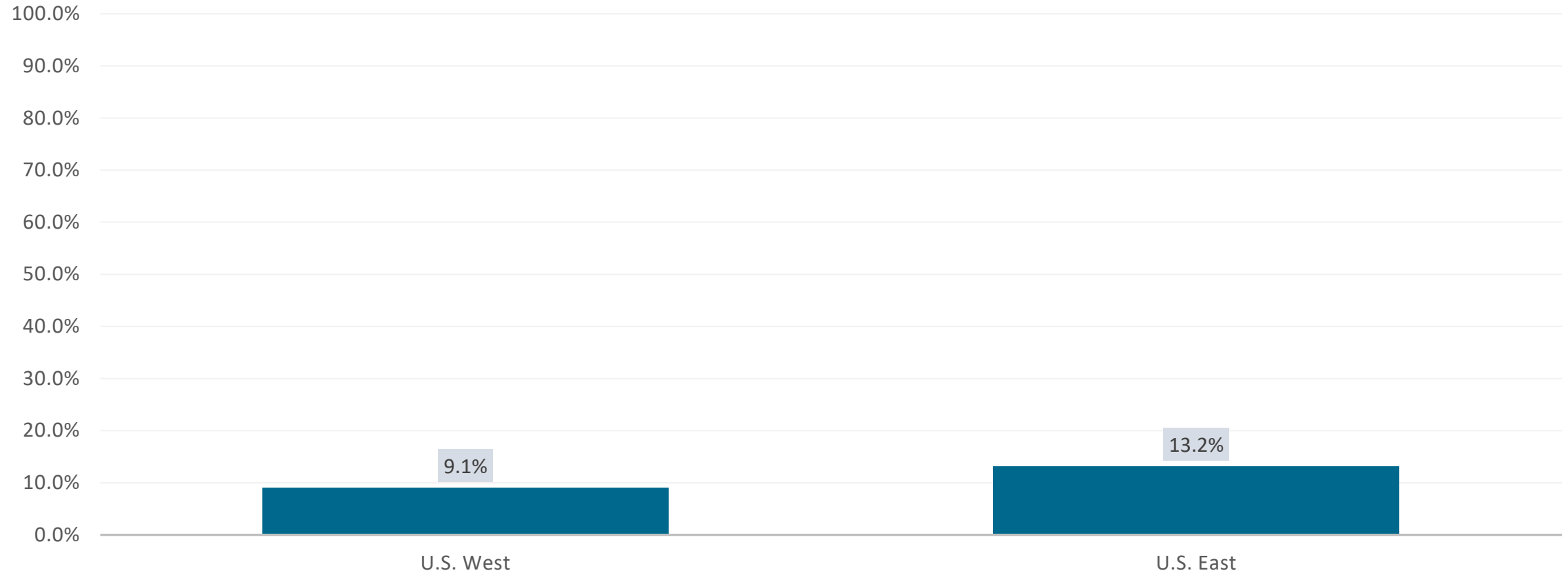
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - MAUI



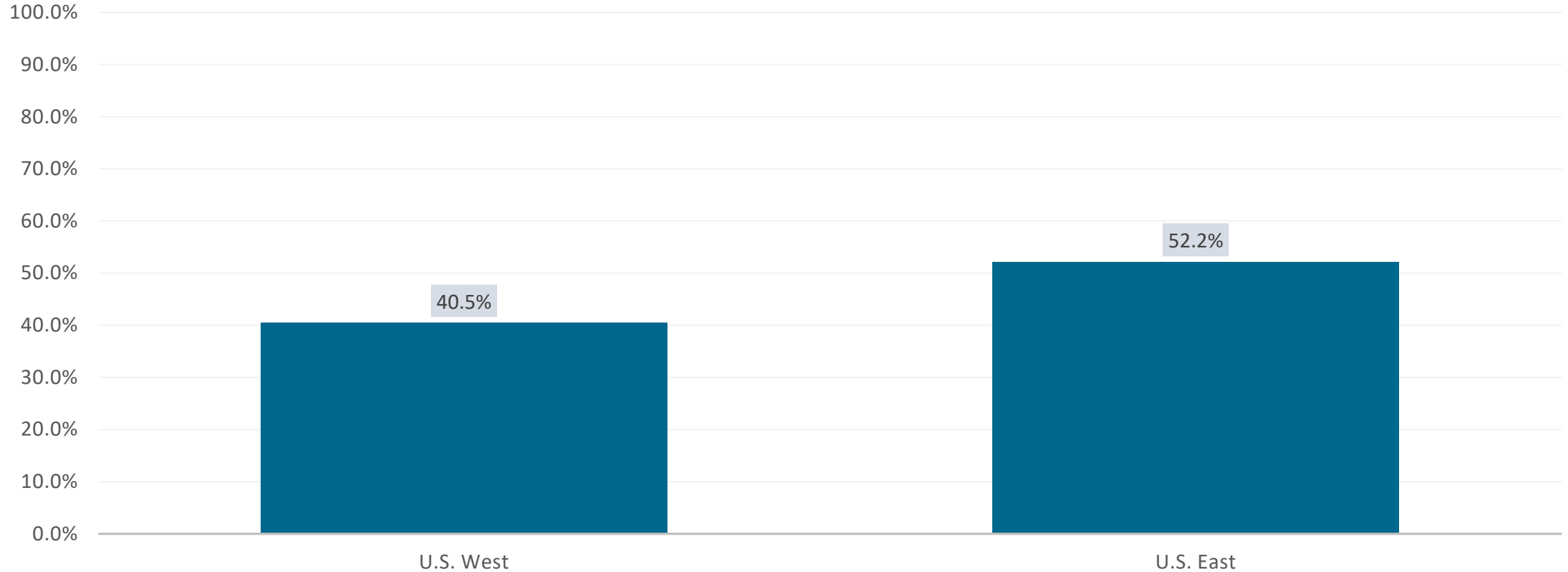
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - MAUI



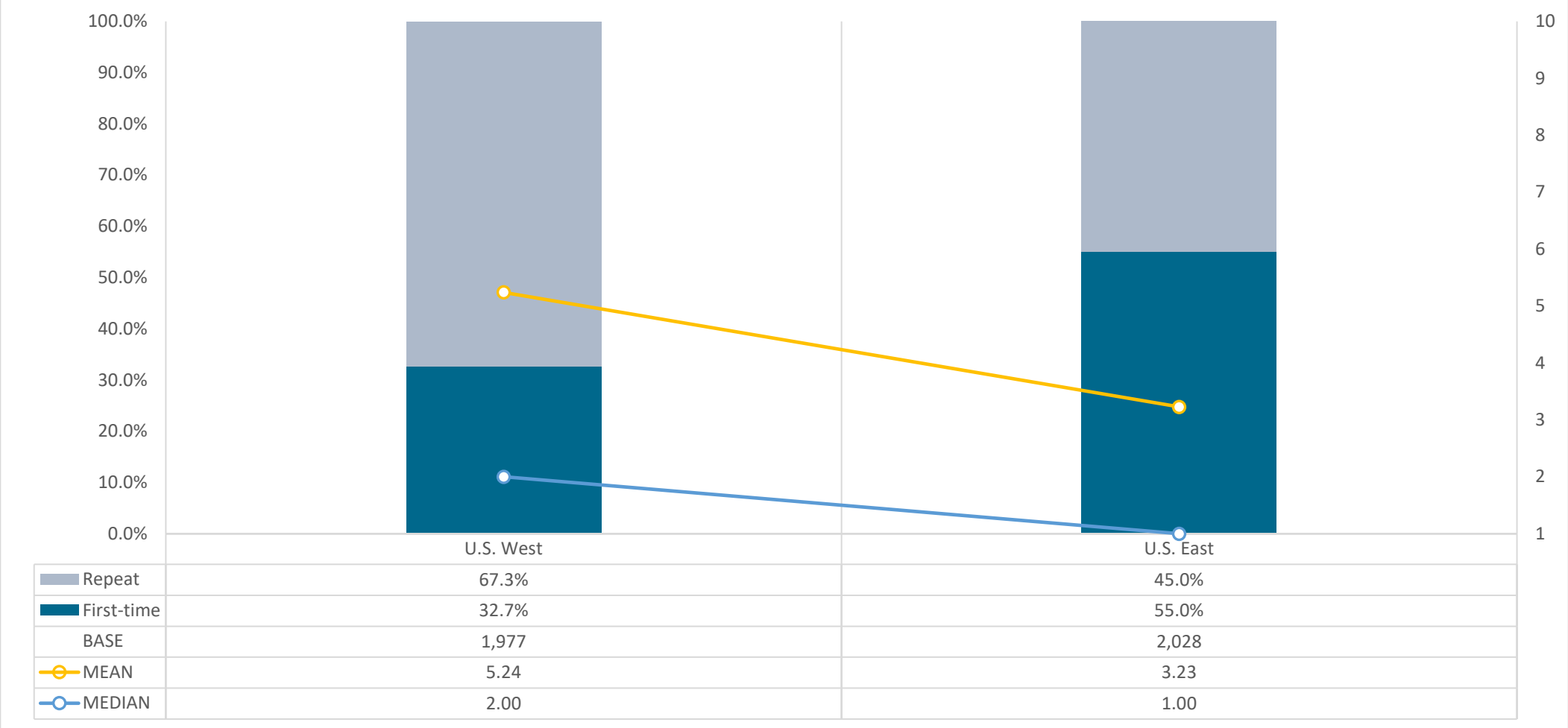
IMPACT OF HAWAIIAN CULTURAL EVENTS - MAUI



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - MAUI



1st TIME VS REPEAT VISITOR - MAUI



1st TIME VS REPEAT VISITOR - MAUI

- **Travel party:** Respondents from both U.S. visitor markets who traveled to Maui alone have visited Maui most often on average.
- **Age:** In both U.S. visitor markets, the average number of visits to Maui was highest amongst senior respondents.
- **Gender:** Male visitors from U.S. West have been to Maui more often on average compared to female visitors.
- **Household income:** Amongst travelers from U.S. West the number of trips to Maui increased as visitors became more affluent.

ACCOMMODATIONS - MAUI

	U.S. West	U.S. East
Hotel/ resort/ villa	40.6%	51.8%
Condominium/ apartment	33.2%	23.2%
Vacation rental (includes AirBnB, VRBO, etc.)	21.2%	21.1%
Timeshare Unit	16.5%	11.4%
Stayed with friends or relatives	5.1%	5.3%
Rental House	1.2%	2.2%
Private Room in Private Home	1.5%	1.3%
Own property/ second home	1.3%	0.4%
Bed & Breakfast	0.9%	1.0%
Hostel	0.7%	1.0%
Camp Site, Beach	0.5%	0.8%
Day trip/ Did not stay overnight	0.5%	0.7%
Shared Room/ Space in Private Home	0.7%	0.3%

ACCOMMODATIONS - MAUI

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	66.0%	53.2%
■ Residential Neighborhood	34.0%	46.8%
BASE	470	494

ACCOMMODATIONS - MAUI

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Location	40.6%	36.9%
Price/ value/ best deal	21.0%	23.6%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	16.5%	18.8%
Ability to have travel party members stay together	6.3%	6.4%
Owned by self, friend or relative	6.5%	4.7%
Availability	3.7%	4.5%
Recommendation from friends or family	3.5%	3.2%

STRENGTHS/ POSITIVE ASPECTS – MAUI

	U.S. West	U.S. East
Beach/ ocean	29.9%	19.5%
Nature/ natural beauty/ scenery	19.1%	28.8%
Variety of activities/ attractions/ many choices	11.8%	19.0%
Feeling of the “Aloha Spirit”	9.1%	7.5%
Friendliness of the local people	4.4%	4.2%
Accommodations/ was as promised	4.5%	3.0%
Food/ restaurant variety/ dining options	3.7%	2.7%
Overall customer service/ hospitality/ the people	3.3%	2.6%
Events/ celebrations with friends/ family	2.5%	2.5%
Local culture/ people/ music	2.0%	2.2%
Food/ restaurant/ good service	1.5%	1.4%
Accommodations/ good service from staff	1.3%	1.5%
Accommodations/ cleanliness/ upkeep	1.1%	0.8%

STRENGTHS/ POSITIVE ASPECTS - MAUI

- **Islands visited:** Visitors from U.S. West and U.S. East who stayed entirely on Maui were more likely to name the beach and ocean as a driver of satisfaction than those who visited another island in addition to Maui.
- **Education:** Amongst visitors from U.S. East, those with a college degree were more likely to include the variety of activities and attractions on Maui as a driver of satisfaction than those without a college degree.
- **Gender:** Female respondents from U.S. West were more likely to cite the “Aloha Spirit” as a driver of satisfaction than male respondents. Conversely, males from U.S. West were more likely to identify the variety of attractions and activities as a driver of trip satisfaction.
- **Household income:** Travelers from U.S. East in the bottom income tier were more likely to list Maui’s natural beauty as a driver of satisfaction than more affluent visitors.
- **Trips to Hawai‘i:** First-time visitors to Maui from both U.S. visitor markets were more likely to identify the variety of activities and attractions as well as the island’s natural beauty as drivers of satisfaction. Repeat visitors to the state from U.S. West were more likely to name beaches and the ocean as a driver of satisfaction than first-time visitors.

AREAS OF OPPORTUNITIES - MAUI

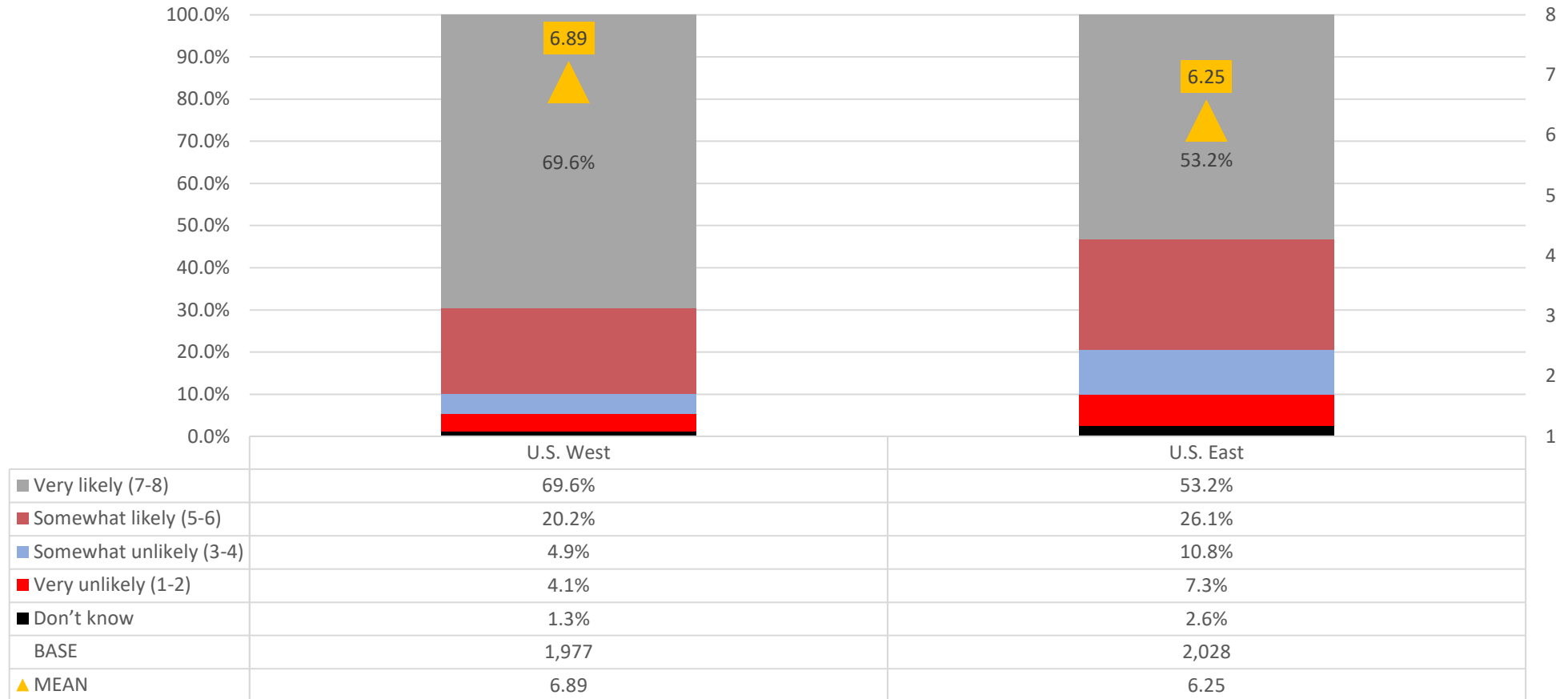
	U.S. West	U.S. East
No negatives/ everything was great	39.6%	40.4%
Food/ restaurant variety/ dining options	8.6%	8.7%
Coronavirus / COVID 19 pandemic	7.6%	7.2%
Would like to experience more local culture	7.2%	7.5%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	6.1%	5.1%
Traffic (congested/slow)	5.4%	5.4%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	3.1%	3.9%

AREAS OF OPPORTUNITIES - MAUI

- **Education:** Those with a college degree from both U.S. visitor markets were more likely to express dissatisfaction with the variety of food and dining options on the island. Amongst travelers from U.S. East specifically, college graduates were also more dissatisfied with the traffic situation.
- **Trips to Hawai'i:** First-time visitors from both U.S. markets were more disappointed in the lack of exposure to local culture compared to repeat visitors. First-time visitors from U.S. West were also more dissatisfied with ground transportation options than repeat visitors. Conversely, repeat visitors from U.S. West were more likely to have issues with their rental car experience.
- **Gender:** Female visitors from U.S. West were more likely to express dissatisfaction with their rental car experience on Maui than male visitors. Female visitors from U.S. West were more likely to express disappointment with their ability to experience more of the local culture. Male visitors from U.S. East were more dissatisfied with the traffic on island than female visitors.
- **Household income:** Less affluent visitors from U.S. West were more likely to identify the lack or availability of ground transportation than more affluent visitors. Amongst respondents from U.S. East, the perceived lack of variety of dining options were more of a concern with more affluent visitors.

LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

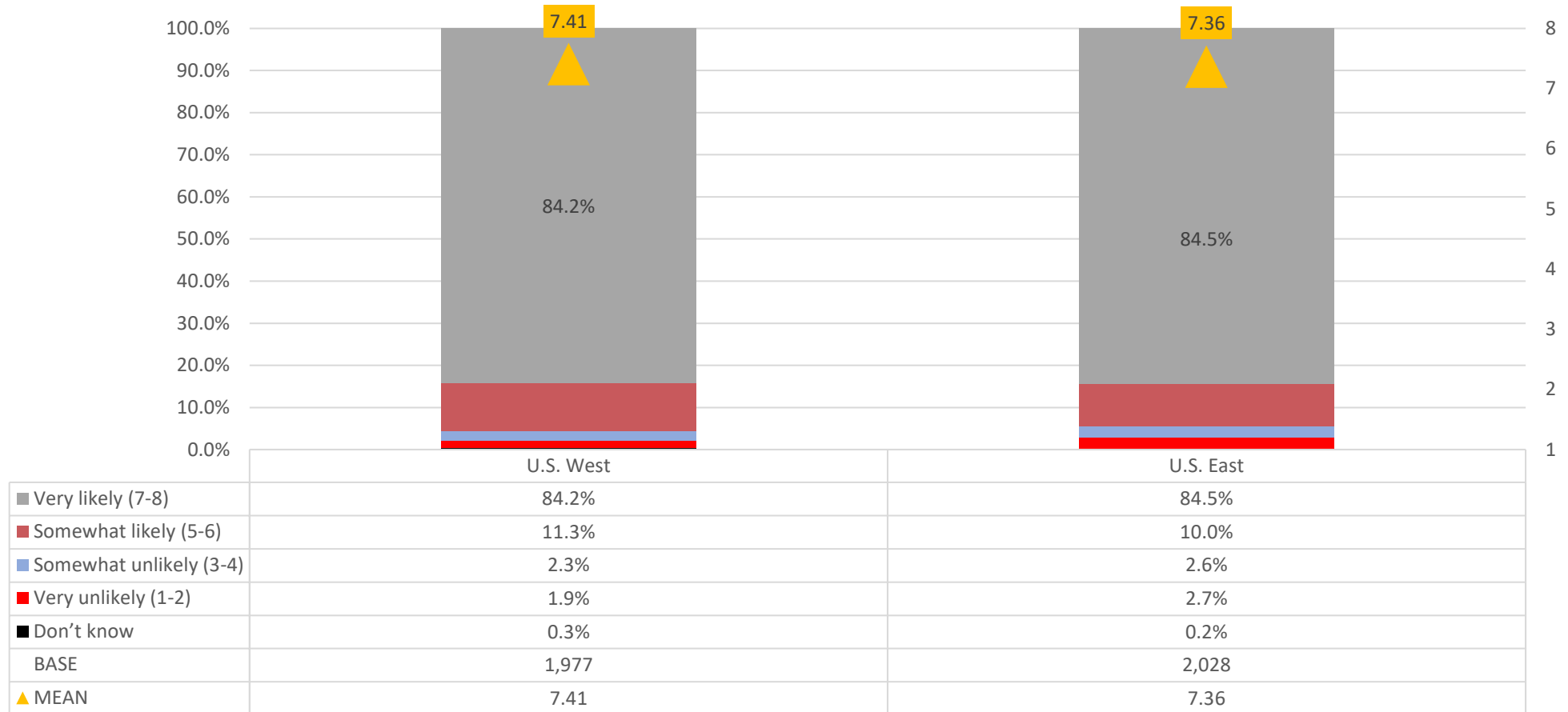
- **Islands visited:** Visitors from U.S. West and U.S. East whose trip was entirely on Maui expressed a greater likelihood of return compared to those who also visited another island during their stay.
- **Travel party size:** The likelihood of return was highest amongst those who traveled to Maui on their own, and declined as travel party size increases. This was true for both U.S. visitor markets.
- **Gender:** Female visitors from U.S. West provide higher mean scores, signifying a greater likelihood of return to Maui, compared to male visitors.

REASONS FOR NOT RETURNING - MAUI

	U.S. West	U.S. East
Want to go someplace new		
Too expensive/cost	27.6%	37.4%
Flight too long	5.3%	27.6%
Not enough value for the price	17.9%	12.4%
No reason to return/ nothing new	13.0%	12.7%
Too crowded/ congested/ traffic	13.5%	6.5%
Unfriendly people/ felt unwelcome	8.9%	7.6%
Too commercial/ overdeveloped	10.4%	5.4%
Coronavirus / COVID 19 pandemic	6.9%	7.1%
Other financial obligations	3.7%	9.3%
Nothing to do/ boring	6.1%	2.2%
Poor service		

BRAND/ DESTINATION ADVOCACY - MAUI

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



BRAND/ DESTINATION ADVOCACY - MAUI

- **Islands visited:** Visitors from U.S. West whose stay was entirely on Maui expressed a greater likelihood of suggesting Maui to others compared to those who also visited another island in addition to Maui.
- **Age:** Brand advocacy for Maui was highest amongst younger respondents under the age of 35 from both U.S. visitor markets.
- **Gender:** Female respondents from both U.S. visitor markets were more likely to recommend Maui to others compared to male respondents.

MAUI ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	94.5%	96.7%
On own (self guided)	83.3%	84.6%
Helicopter/ airplane	2.9%	6.2%
Boat/ submarine/ whale	35.8%	42.3%
Visit towns	54.0%	57.5%
Limo/ van/ bus tour	2.9%	9.8%
Scenic views/ natural landmarks	58.1%	67.6%
Movie/ TV/ film location	0.6%	0.8%

MAUI ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	90.4%	91.6%
Bodyboard	16.6%	8.9%
Stand up paddle board	7.0%	5.7%
Surfing	8.1%	7.9%
Canoeing/ kayak	5.1%	6.1%
Swim ocean	75.5%	75.9%
Snorkel	59.8%	56.4%
Freediving	1.9%	1.9%
Windsurf/ Kitesurf	0.5%	0.3%
Jet ski/ Parasail	1.8%	2.8%
Scuba	3.7%	4.0%
Fishing	2.6%	2.9%
Golf		

MAUI ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	37.3%	33.1%
Spa	10.9%	12.1%
Hiking	43.8%	51.8%
Backpack/Camping	1.1%	1.9%
Agritourism	7.4%	8.5%
Sport event/ tournament	0.3%	0.4%
Park/ botanical garden	26.2%	35.5%
Waterpark	0.8%	0.3%
Mountain tube/ waterfall rappel	0.4%	0.7%
Zip lining	5.0%	6.1%
Skydiving	0.0%	0.2%
All terrain vehicle (ATV)	1.3%	3.0%
Horseback riding		

MAUI ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	99.2%	99.2%
Lunch/ sunset/ dinner/ evening cruise	22.6%	30.0%
Live music/ stage show	20.4%	29.7%
Nightclub/ dancing/ bar/ karaoke	5.7%	5.5%
Fine dining	58.0%	62.5%
Family restaurant	60.9%	55.1%
Fast food	29.1%	30.8%
Food truck	43.8%	47.1%
Café/ coffee house	47.6%	46.2%
Ethnic dining	22.2%	27.2%
Prepared own meal	63.4%	51.0%

MAUI ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	97.7%	96.8%
Mall/ department store	38.4%	36.9%
Designer boutique	18.3%	21.4%
Hotel/ resort store	31.3%	36.3%
Swap meet/ flea market	12.8%	11.9%
Discount/ outlet store	16.2%	15.7%
Supermarket	77.9%	70.1%
Farmer's market	30.1%	27.0%
Convenience store	50.5%	49.7%
Duty free store	2.3%	1.9%
Local shop/ artisan	68.2%	71.9%

MAUI ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	54.8%	65.3%
Historic military site	3.7%	4.9%
Historic Hawaiian site	22.1%	25.3%
Other historical site	9.6%	8.9%
Art museum	1.4%	2.3%
Art galleries/ exhibitions	14.1%	14.5%
Luau/ Polynesian show/ hula show	19.1%	35.0%
Lesson ex. ukulele, hula, canoe, lei making	2.6%	3.9%
Play/ concert/ theatre	0.8%	1.4%
Art/ craft fair	10.8%	9.2%
Festival event	2.2%	1.4%

MAUI ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	94.6%	95.8%
Airport shuttle	7.7%	9.5%
Trolley	3.1%	2.8%
Public bus	2.3%	2.3%
Tour bus/ tour van	2.4%	7.6%
Taxi/ limo	6.1%	8.9%
Rental car	86.3%	85.8%
Ride share	10.0%	11.6%
Bicycle rental	1.8%	2.4%

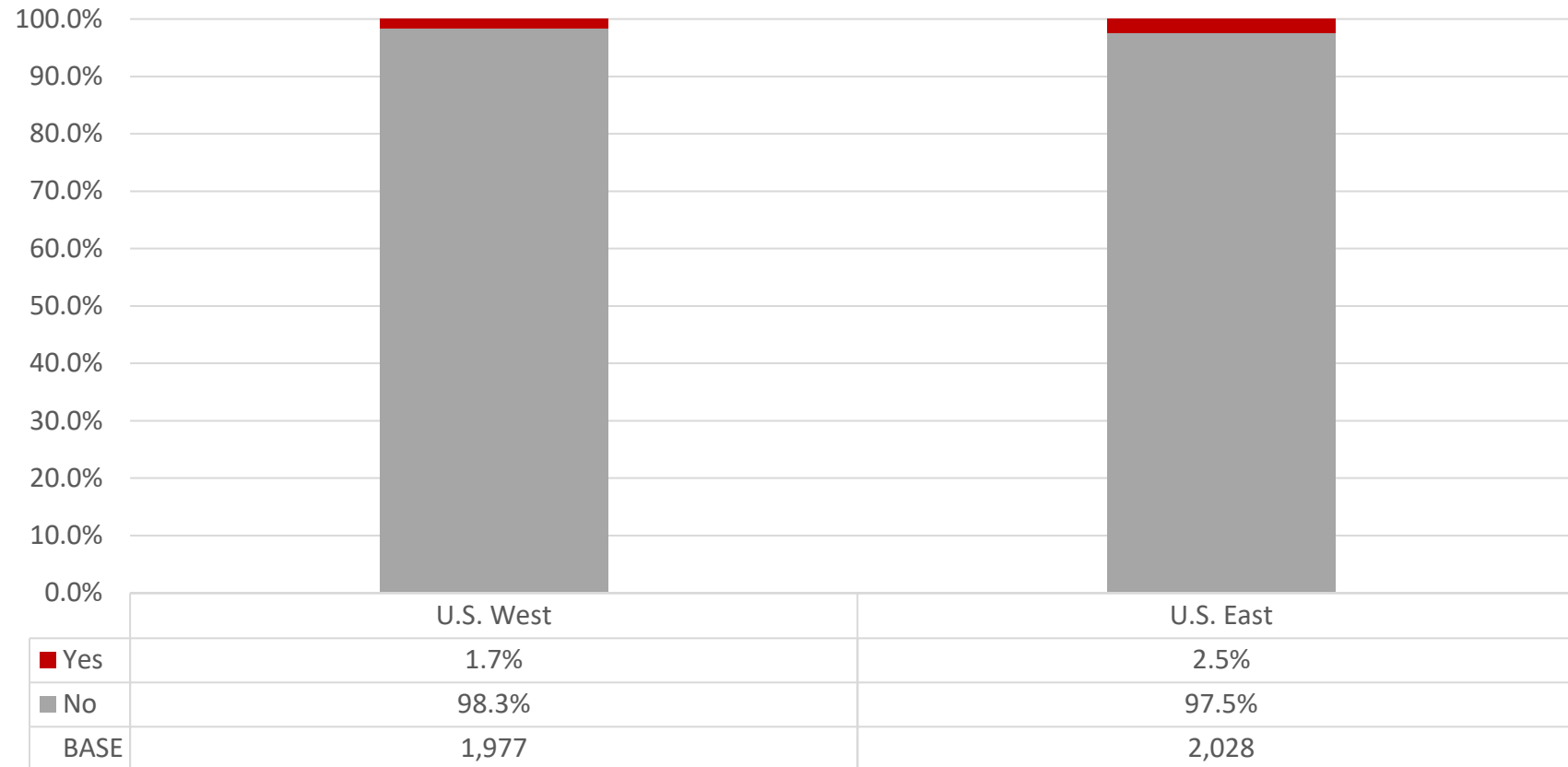
MAUI ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	23.7%	17.1%
Visit friends/ family	22.6%	16.3%
Volunteer non profit	1.5%	1.2%

ATTRACTIONS- MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	1.2%	1.2%
Aquarium Maui /Maui Ocean Center	13.5%	14.3%
Baldwin Missionary Home Museum	3.5%	3.2%
Hale Pa'i Printing House	0.1%	0.1%
Haleakala National Park	29.9%	47.2%
Haleki'i Pihana Heiau State Monument	1.7%	2.1%
Hana Cultural Center	7.1%	10.4%
'Iao Valley State Monument	14.5%	16.2%
Kepanaiwai Park/ Heritage Gardens	3.0%	4.7%
Kula Botanical Garden	6.1%	7.4%
Maui Historical Society Bailey House Museum	1.2%	1.1%
Whaler's Village Museum	12.8%	11.5%
Wo Hing Temple Museum	1.1%	0.8%

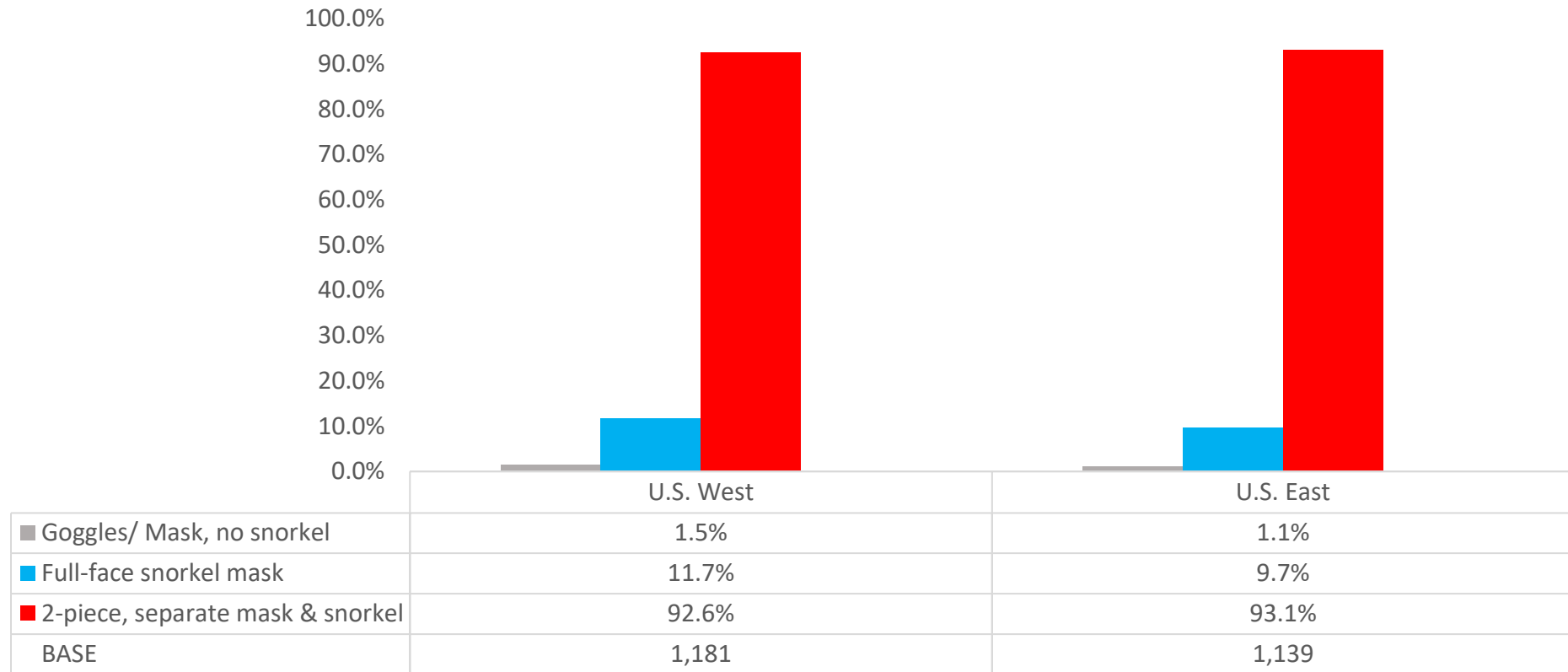
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Other festival/ concert		
Hawai'i Food and Wine Festival	0.0%	1.9%
Kapalua Food & Wine Festival	0.0%	1.9%
Maui Marathon	0.0%	0.0%
Maui Jim Maui Invitational	2.9%	0.0%
Sentry Tournament of Golf Champions	5.7%	1.9%
Xterra	0.0%	2.1%
American Windsurfing Tour	0.0%	0.0%
Maui Film Festival	0.0%	0.0%
Other (please specify festival/event name)	24.5%	20.7%
Convention/Conference/Retreat/Seminar/Meeting/Workshop/Training/Work event	20.8%	9.7%
Wedding/ Honeymoon/ Anniversary/ Birthday/ Funeral/ Graduation	43.3%	57.8%
Other sporting event	2.9%	1.9%
BASE		

SNORKELING EQUIPMENT USED - MAUI

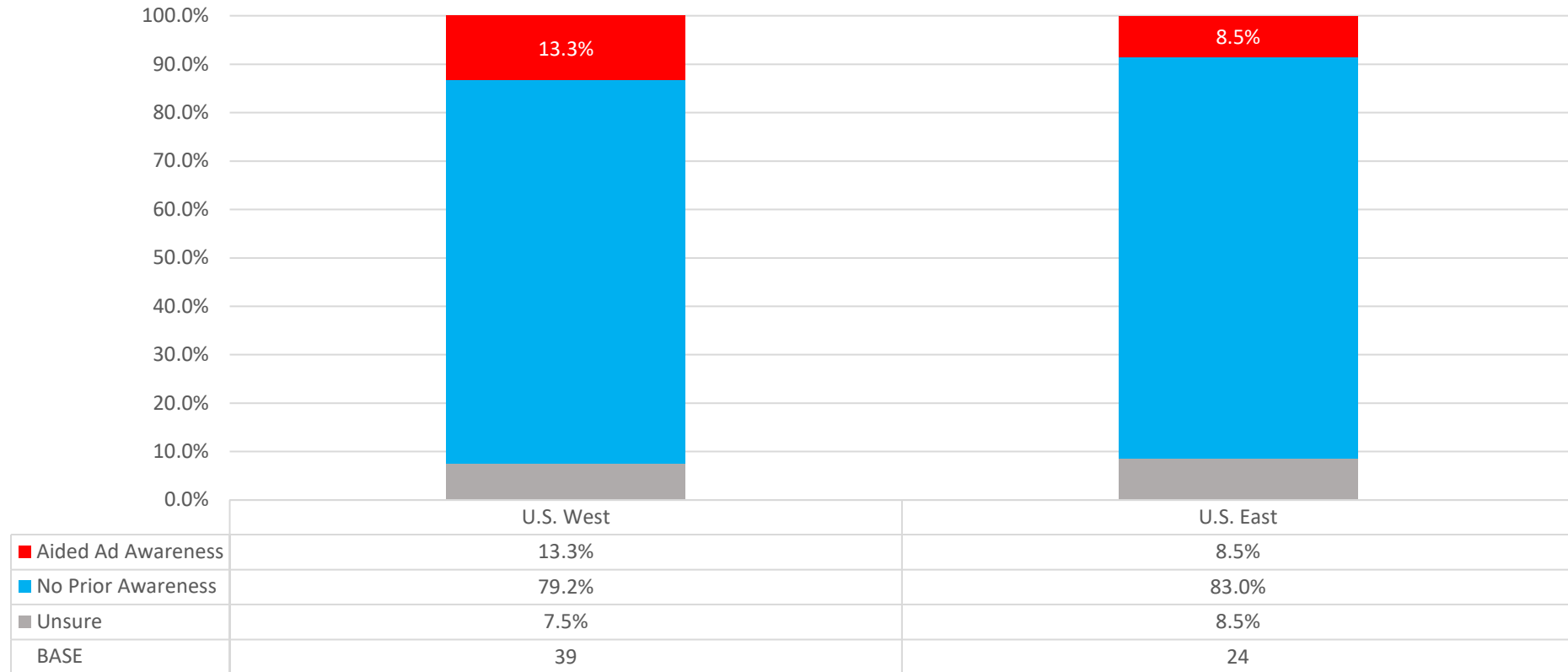


SNORKELING OCEAN SAFETY- MAUI

	U.S. West	U.S. East
Did not have to be assisted or rescued	98.0%	98.0%
Yes, needed assistance using 2 piece mask & snorkel	1.7%	2.0%
Yes, while using a full face snorkel mask	0.3%	0.0%
BASE	1,164	1,127

Section – Molokaʻi

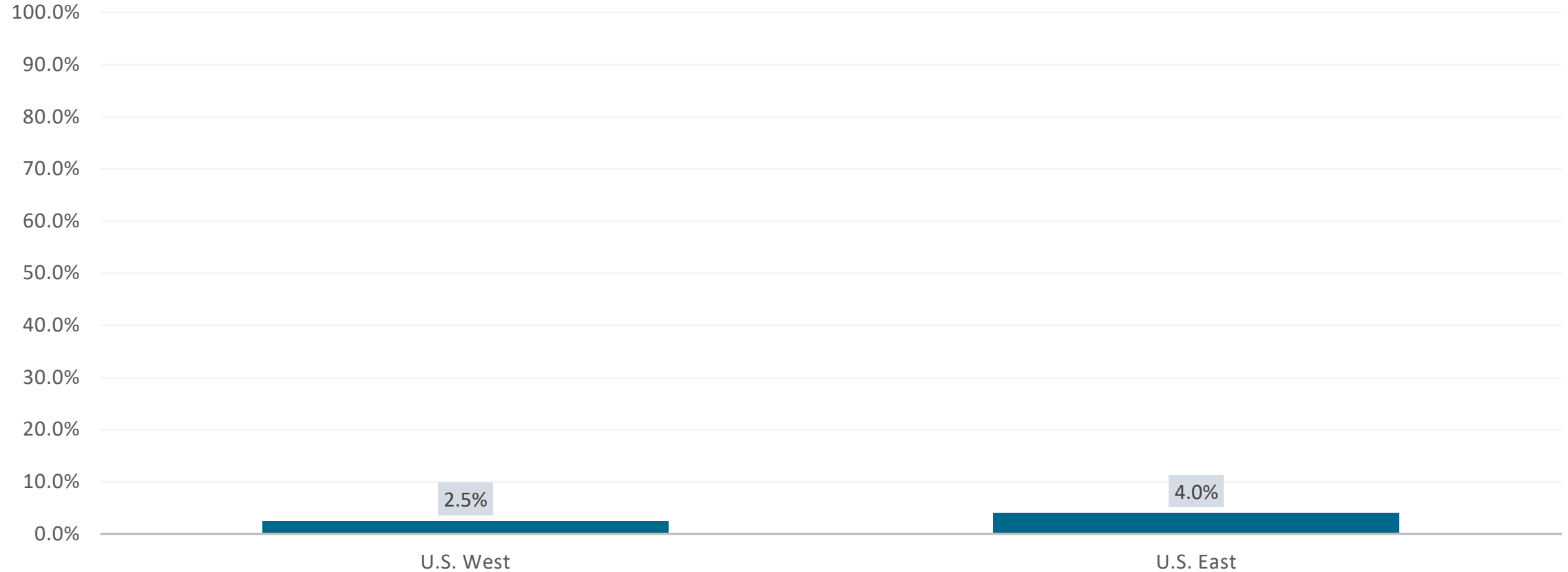
AIDED ADVERTISING AWARENESS MOLOKAI'I



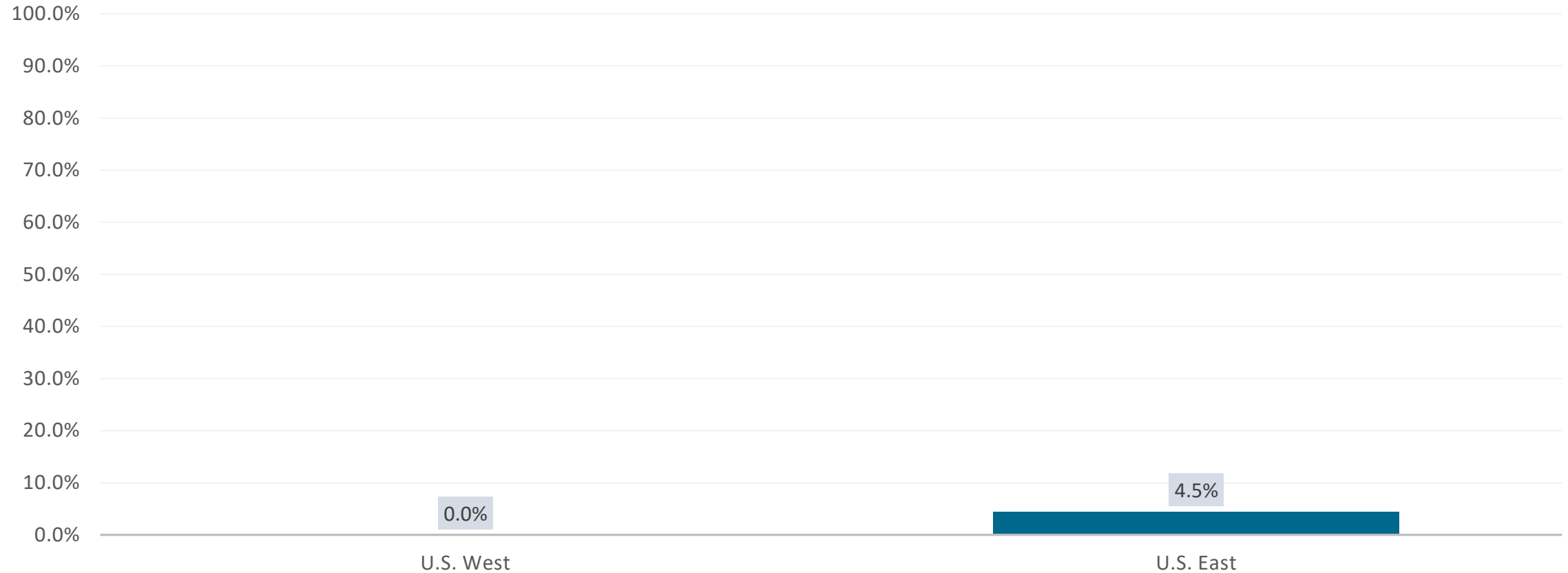
IMPACT OF LOCATION FILMING MOLOKA'I



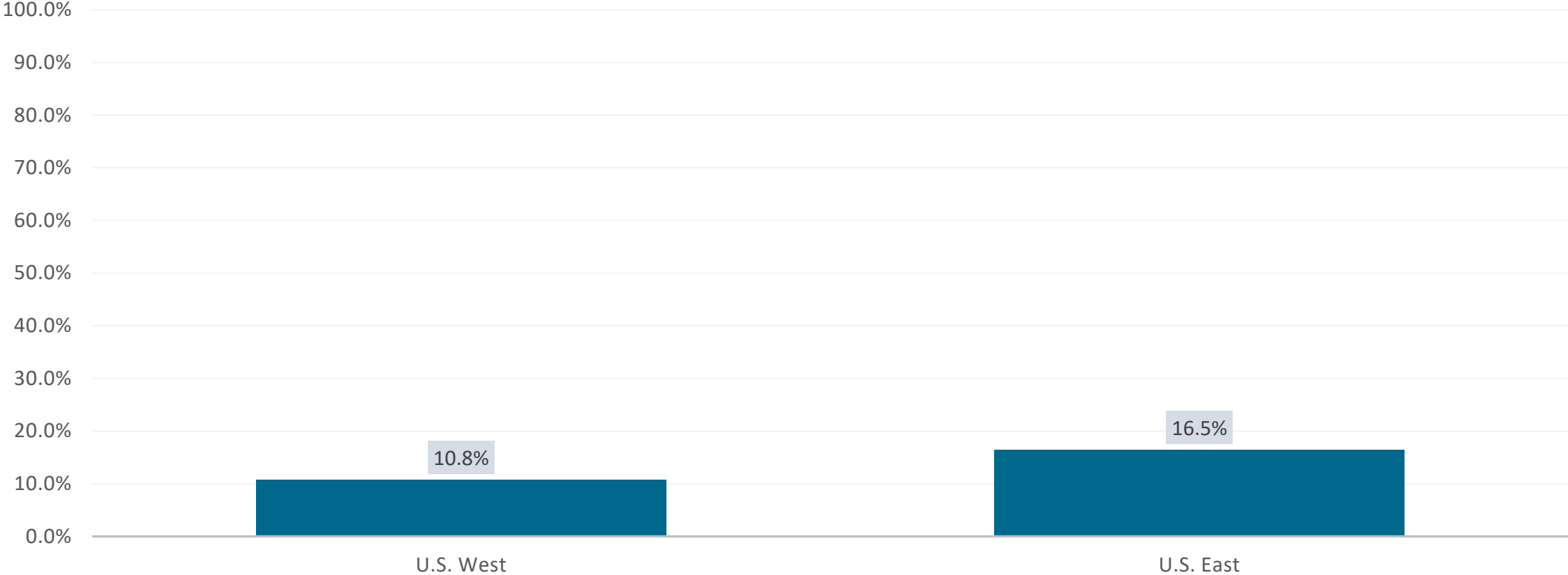
IMPACT OF HAWAIIAN MUSIC MOLOKA'I



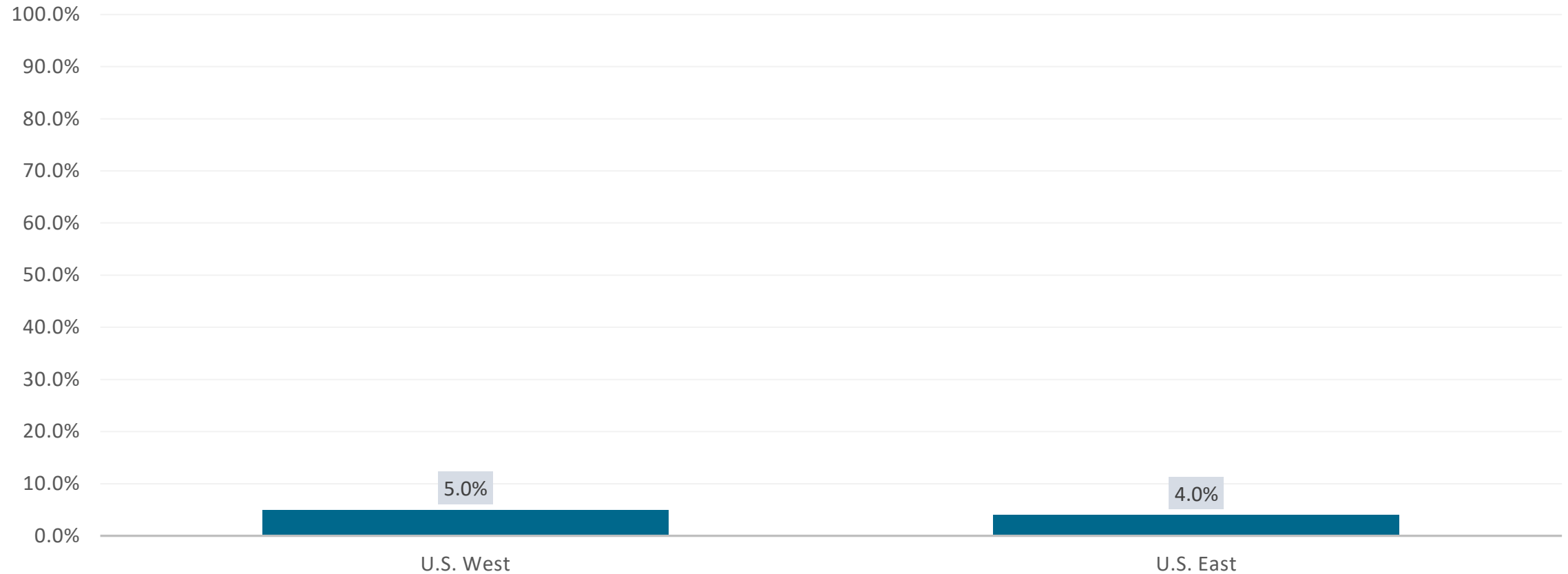
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS MOLOKA'I



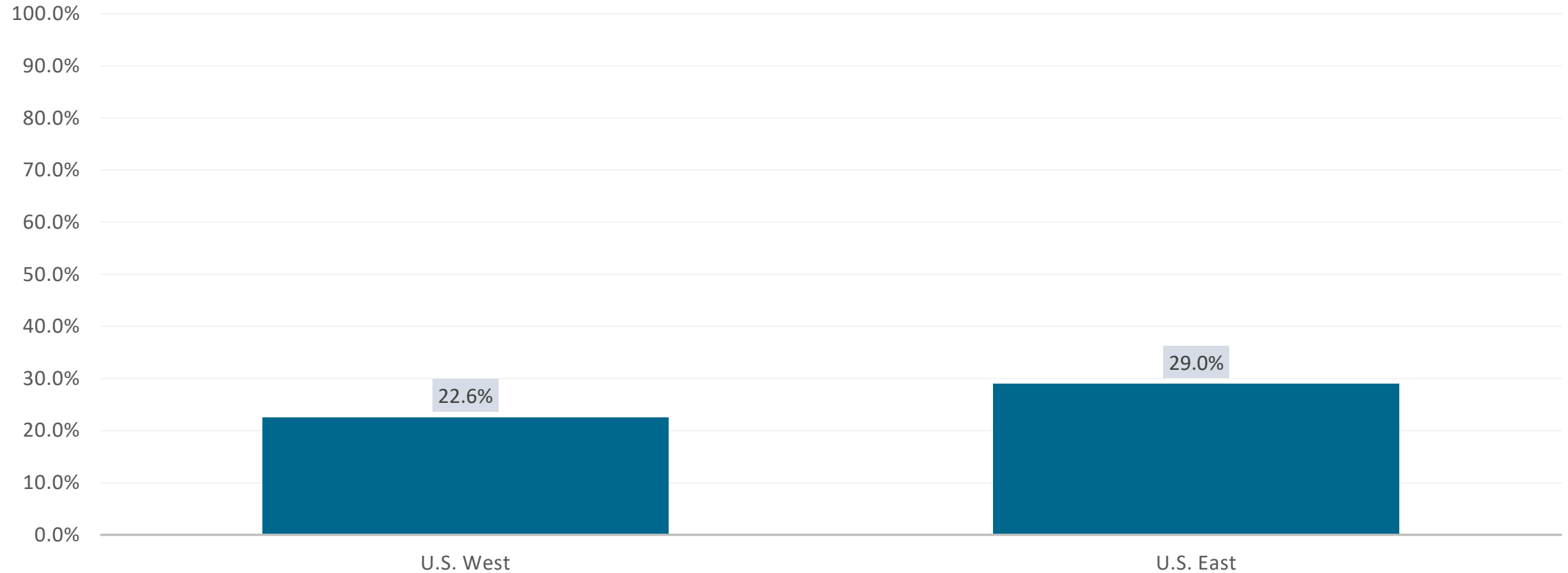
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - MOLOKA'I



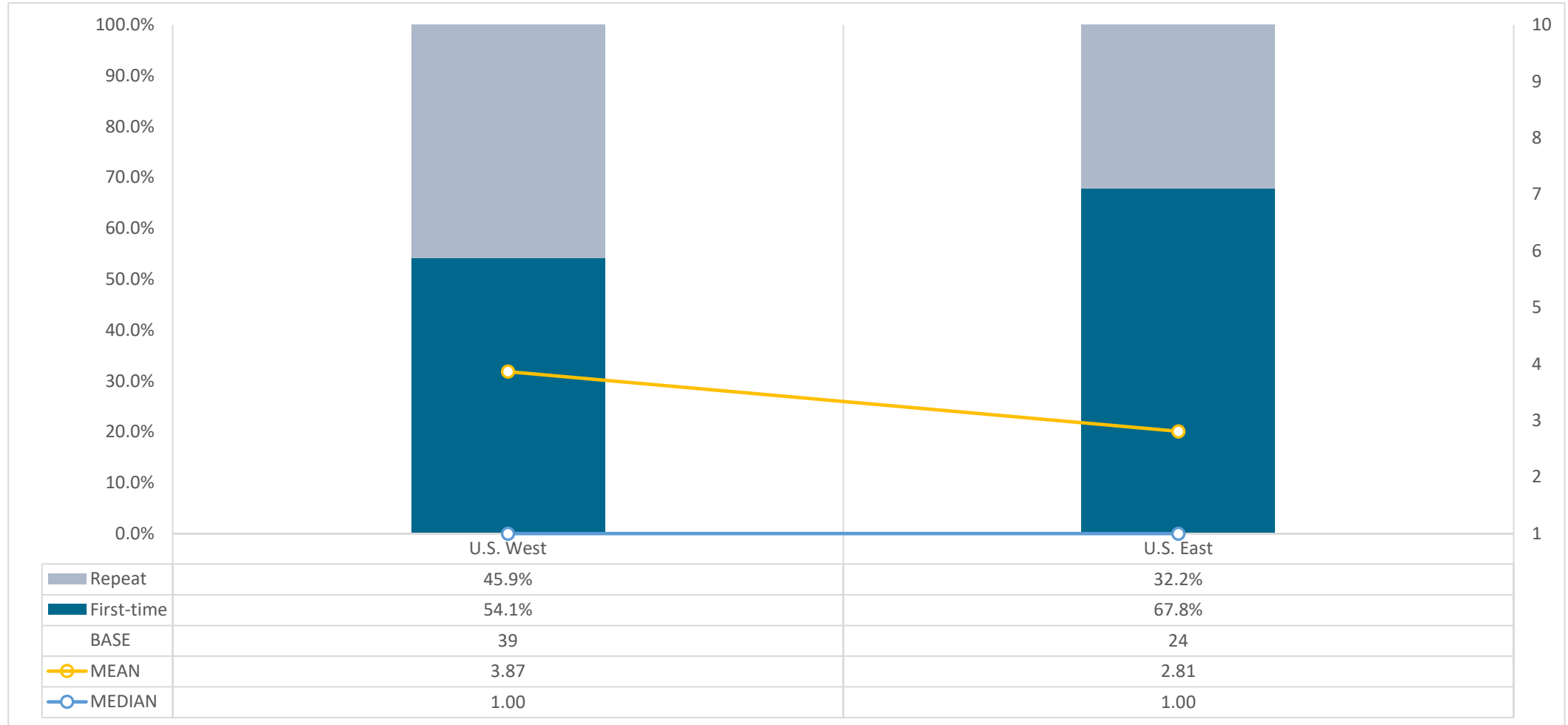
IMPACT OF HAWAIIAN CULTURAL EVENTS MOLOKA'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - MOLOKA'I



1st TIME VS REPEAT VISITOR - MOLOKA'I



ACCOMMODATIONS - MOLOKA'I

	U.S. West	U.S. East
Condominium/ apartment	20.1%	28.1%
Vacation rental (includes AirBnB, VRBO, etc.)	18.3%	25.4%
Stayed with friends or relatives	22.6%	8.5%
Hotel/ resort/ villa	12.5%	17.0%
Day trip/ Did not stay overnight	10.8%	21.0%
Private Room in Private Home	12.5%	0.0%
Shared Room/ Space in Private Home	5.7%	4.0%
Own property/ second home	5.0%	4.0%
Camp Site, Beach	5.0%	0.0%
Hostel	2.5%	0.0%
Timeshare Unit	2.5%	0.0%

ACCOMMODATIONS - MOLOKA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	29.4%	27.3%
■ Residential Neighborhood	70.6%	72.7%
BASE	14	7

ACCOMMODATIONS - MOLOKA'I

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Owned by self, friend or relative	43.1%	0.0%
Price/ value/ best deal	22.6%	42.4%
Availability	13.7%	13.6%
Recommendation from friends or family	13.7%	0.0%
Previous Experience	6.9%	0.0%
Ability to have travel party members stay together	0.0%	15.1%
Amenities like home (such as kitchen, gathering space, outdoor space, etc.)	0.0%	15.1%
Location	0.0%	13.6%

STRENGTHS/ POSITIVE ASPECTS MOLOKA'I

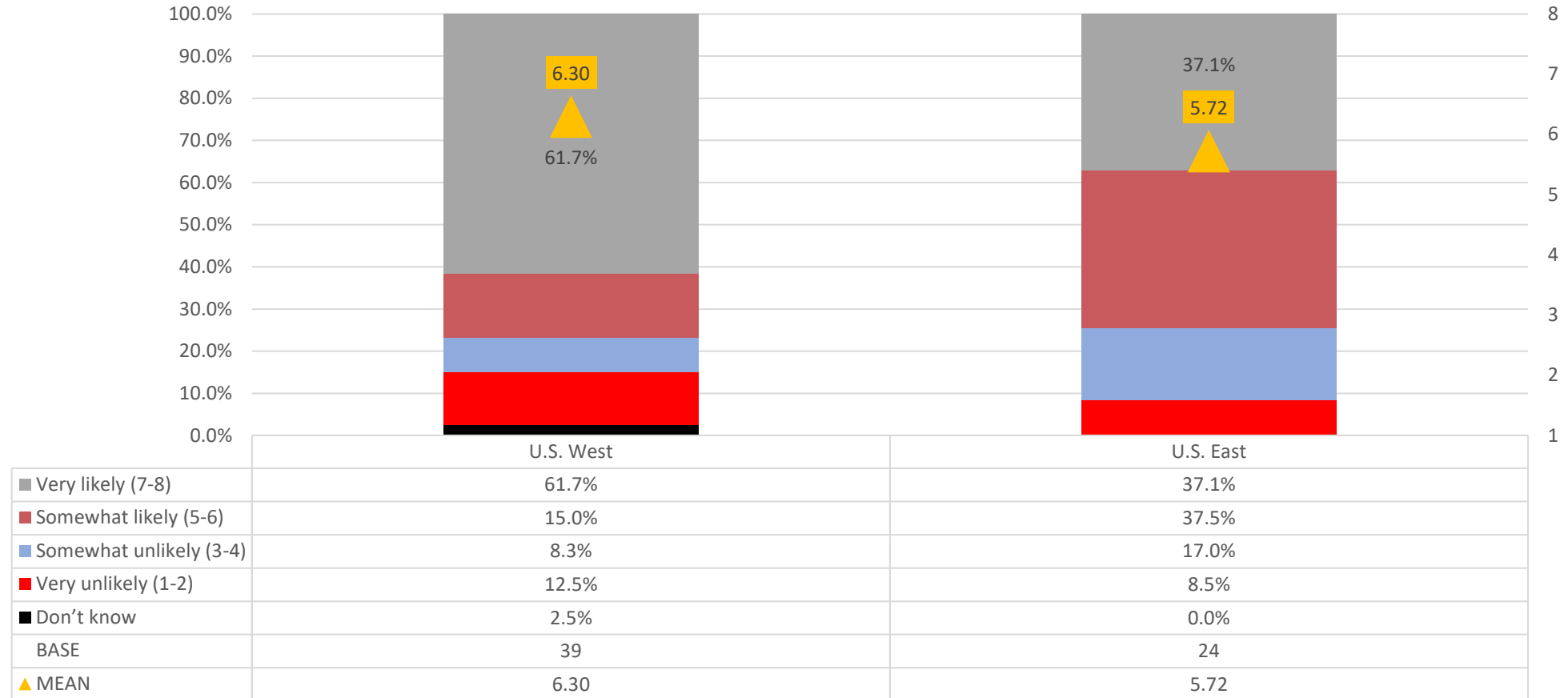
	U.S. West	U.S. East
Beach/ ocean		
Nature/ natural beauty/ scenery	13.3%	28.6%
Friendliness of the local people	10.0%	12.5%
Local culture/ people/ music	10.0%	8.5%
Feeling of the "Aloha Spirit"	10.0%	0.0%
Events/ celebrations with friends/ family	7.5%	4.0%
Activities/Attractions (not specified as part of a package)	5.0%	4.5%
Accommodations/ was as promised	5.0%	0.0%
Overall customer service/ hospitality/ the people	2.5%	4.5%
Variety of activities/ attractions/ many choices	2.5%	4.5%
Not crowded/ few tourists	2.5%	0.0%
Location	2.5%	0.0%
Food/ restaurant variety/ dining options	0.0%	8.0%
Accommodations/ good service from staff	0.0%	4.5%
Food/ restaurant/ good service	0.0%	4.5%
Feeling safe (able to walk at night)		

AREAS OF OPPORTUNITIES - MOLOKA'I

	U.S. West	U.S. East
No negatives/ everything was great	33.3%	46.4%
Food/ restaurant variety/ dining options	20.8%	4.0%
Variety of activities/ attractions	13.3%	4.5%
Food/ restaurant quality	5.0%	8.5%
Friendliness of local people	5.0%	8.0%
Overall customer service/ hospitality/ the people	5.0%	0.0%
Accommodations/ cleanliness/ upkeep	2.5%	8.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	2.5%	4.0%
Coronavirus / COVID 19 pandemic	2.5%	0.0%
Beach issues/access/damage	2.5%	0.0%
Nuisances (dirty or unavailable public restrooms, litter, bugs, animals, noise, shabby)	2.5%	0.0%
Would like to experience more local culture	2.5%	0.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	2.5%	0.0%
Unfriendly/Felt Unwelcome/Japanese Catered to	0.0%	4.5%
Better Planning/More Information (signage, maps, research)	0.0%	4.0%
Other	4.0%	0.0%
Traffic	0.0%	4.0%

LIKELIHOOD OF RETURN VISIT MOLOKA'I

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

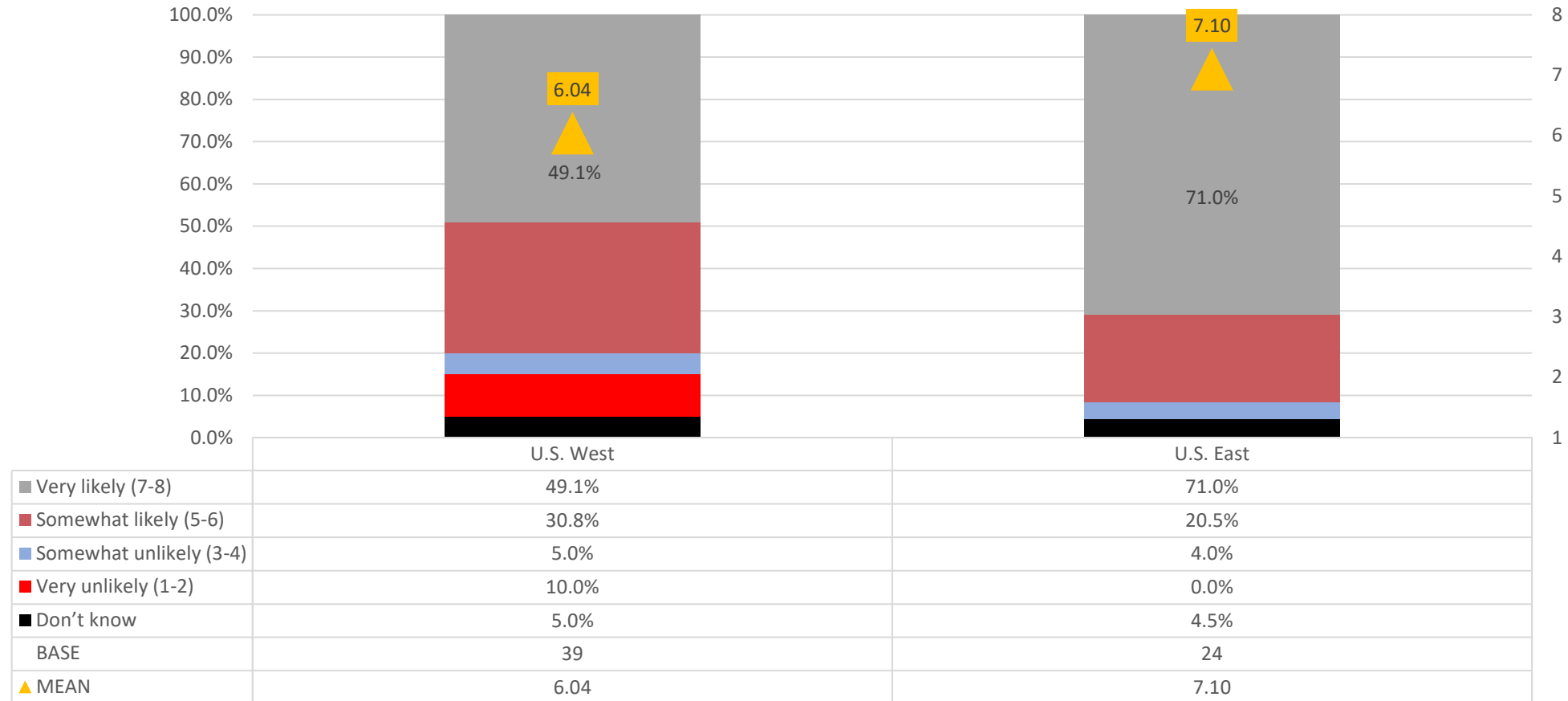


REASONS FOR NOT RETURNING MOLOKA'I

	U.S. West	U.S. East
Want to go someplace new		
Unfriendly people/ felt unwelcome	32.3%	15.8%
No reason to return/ nothing new	32.3%	0.0%
Nothing to do/ boring	10.8%	15.8%
Five years too soon to revisit	10.8%	0.0%
Politics/ Trump/ Immigration	10.8%	0.0%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	10.8%	0.0%
Other financial obligations	0.0%	17.5%
Already visited/ been there several times	0.0%	15.8%
Flight too long		

BRAND/ DESTINATION ADVOCACY MOLOKA'I

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



MOLOKA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	90.0%	100.0%
On own (self guided)	76.7%	65.6%
Helicopter/ airplane	8.3%	12.9%
Boat/ submarine/ whale	16.5%	21.4%
Visit towns	36.6%	44.7%
Limo/ van/ bus tour	5.0%	4.5%
Scenic views/ natural landmark	39.1%	53.1%
Movie/ TV/ film location	0.0%	0.0%

MOLOKA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	71.7%	66.5%
Bodyboard	2.5%	0.0%
Stand up paddle board	7.5%	0.0%
Surfing	0.0%	0.0%
Canoeing/ kayak	5.0%	4.5%
Swim ocean	54.1%	41.1%
Snorkel	31.6%	21.0%
Freediving	2.5%	0.0%
Windsurf/ Kitesurf	0.0%	0.0%
Jet ski/ Parasail	0.0%	0.0%
Scuba	0.0%	12.9%
Fishing	23.3%	0.0%
Golf		

MOLOKA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	43.4%	12.5%
Spa	2.5%	4.0%
Hiking	51.6%	33.0%
Backpack/Camping	8.3%	0.0%
Agritourism	10.0%	8.5%
Sport event/ tournament	2.5%	0.0%
Park/ botanical garden	10.0%	12.5%
Waterpark	0.0%	0.0%
Mountain tube/ waterfall rappel	0.0%	0.0%
Zip lining	0.0%	0.0%
Skydiving	0.0%	0.0%
All terrain vehicle (ATV)	2.5%	0.0%
Horseback riding		

MOLOKA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	100.0%	78.6%
Lunch/ sunset/ dinner/ evening cruise	5.7%	4.0%
Live music/ stage show	5.0%	29.5%
Nightclub/ dancing/ bar/ karaoke	2.5%	4.0%
Fine dining	18.3%	16.1%
Family restaurant	44.1%	36.6%
Fast food	22.6%	20.5%
Food truck	20.8%	29.0%
Café/ coffee house	23.3%	12.5%
Ethnic dining	15.0%	20.1%
Prepared own meal	90.0%	45.5%

MOLOKA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	95.0%	70.5%
Mall/ department store	2.5%	4.0%
Designer boutique	5.0%	0.0%
Hotel/ resort store	5.0%	8.0%
Swap meet/ flea market	5.0%	4.0%
Discount/ outlet store	5.7%	0.0%
Supermarket	56.6%	54.0%
Farmer's market	25.8%	25.4%
Convenience store	23.3%	17.0%
Duty free store	0.0%	0.0%
Local shop/ artisan	62.4%	37.5%

MOLOKA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	54.1%	54.5%
Historic military site	5.0%	4.5%
Historic Hawaiian site	40.9%	42.0%
Other historical site	10.0%	21.4%
Art museum	0.0%	0.0%
Art galleries/ exhibitions	3.2%	0.0%
Luau/ Polynesian show/ hula show	5.0%	8.0%
Lesson ex. ukulele, hula, canoe, lei making	3.2%	4.5%
Play/ concert/ theatre	0.0%	0.0%
Art/ craft fair	0.0%	4.0%
Festival event	7.5%	0.0%

MOLOKA'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	79.2%	75.0%
Airport shuttle	10.0%	4.0%
Trolley	0.0%	0.0%
Public bus	5.0%	4.0%
Tour bus/ tour van	2.5%	4.5%
Taxi/ limo	2.5%	0.0%
Rental car	66.7%	62.1%
Ride share	2.5%	4.5%
Bicycle rental	2.5%	0.0%

MOLOKA'I ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	45.9%	28.6%
Visit friends/ family	43.4%	24.6%
Volunteer non profit	10.0%	4.0%

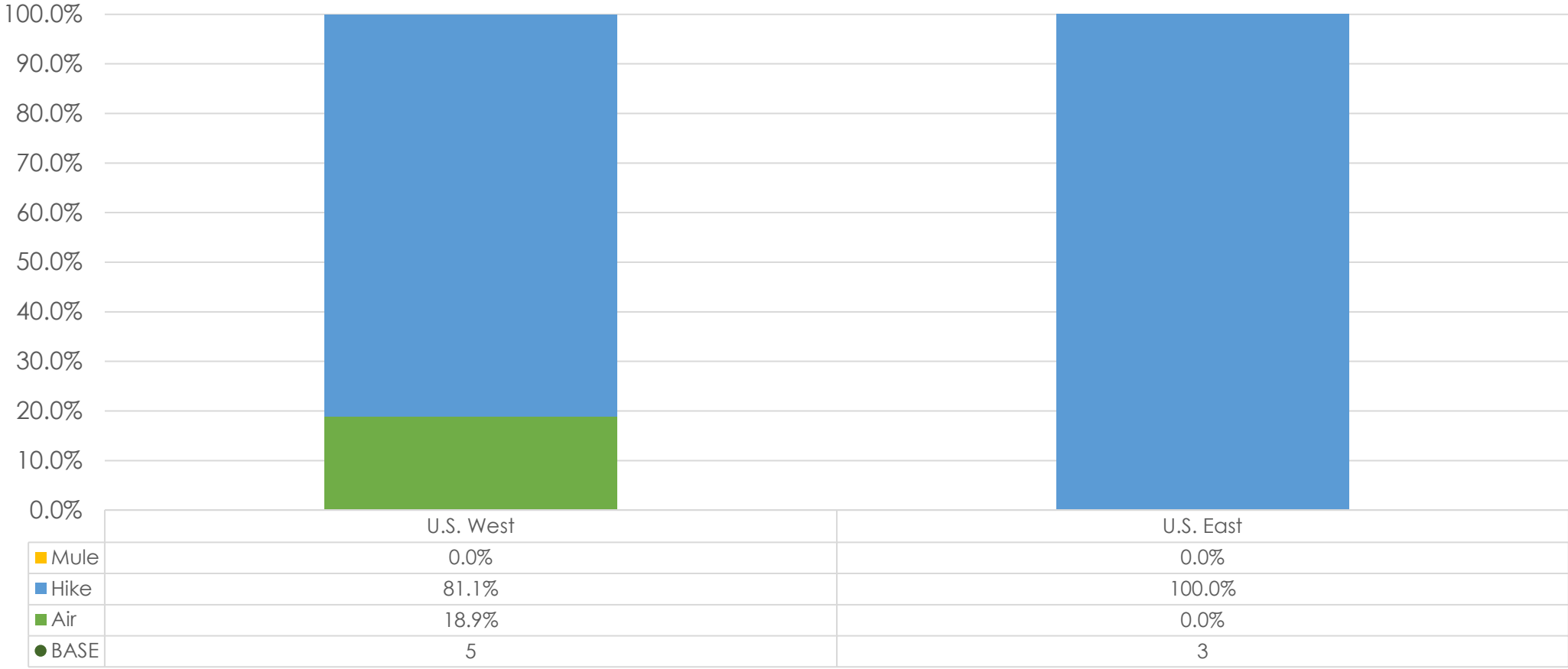
MOLOKA'I ATTRACTIONS

	U.S. West	U.S. East
Ali'i Fishpond		
Halawa Beach Park	27.6%	29.5%
Halawa Valley	28.3%	37.5%
Kalaupapa National Historic Park	13.3%	12.1%
Kamakou	3.2%	4.5%
Kapuaiwa Coconut Grove	7.5%	16.5%
Kapukahehu Beach	26.5%	12.5%
Kumimi Beach Park		

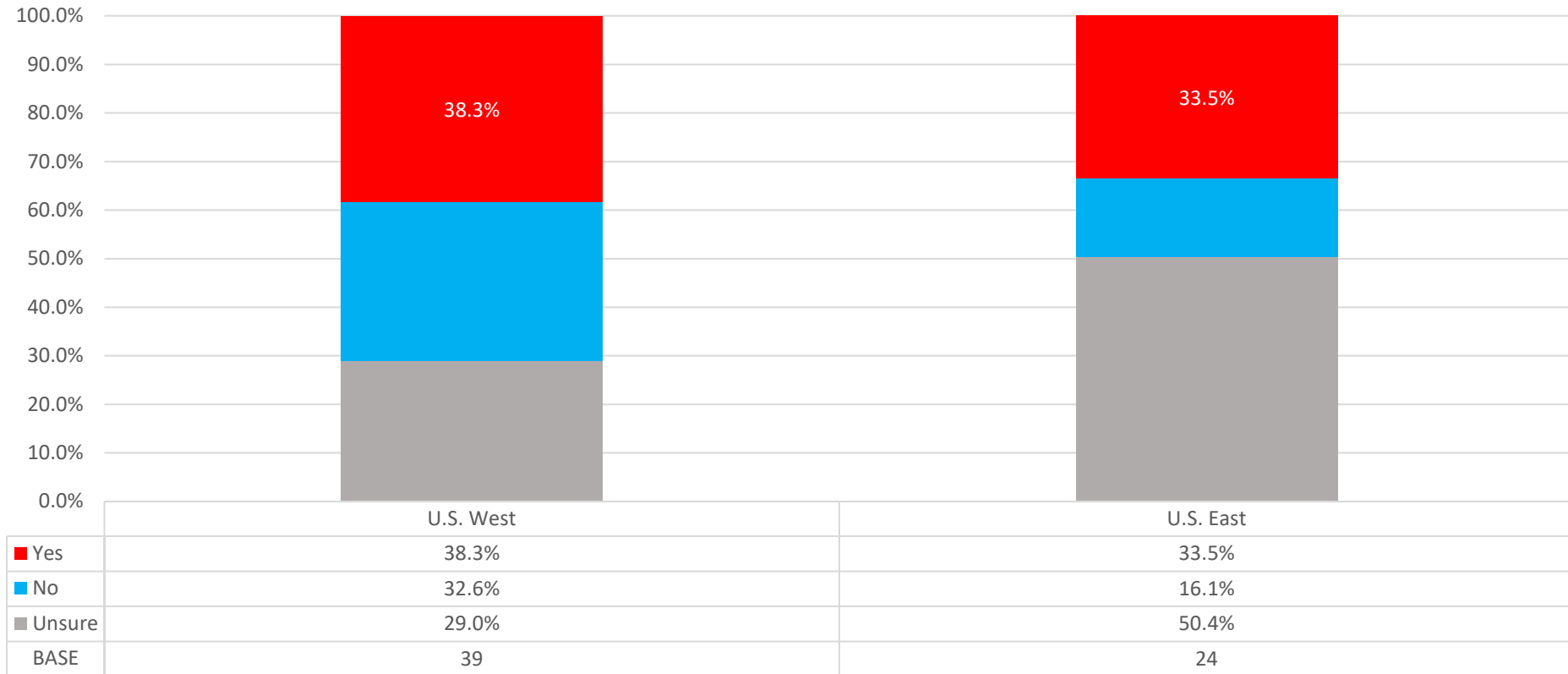
MOLOKA'I ATTRACTIONS

	U.S. West	U.S. East
Moloka'i Mule Ride	0.0%	0.0%
Moloka'i Museum & Cultural Center	7.5%	8.0%
Olo'upena Falls	2.5%	12.5%
One Ali'i Beach Park	25.1%	16.5%
Pala'au State Park	23.3%	33.5%
Papohaku Beach	61.7%	28.6%
Wailau Valley	10.8%	8.5%

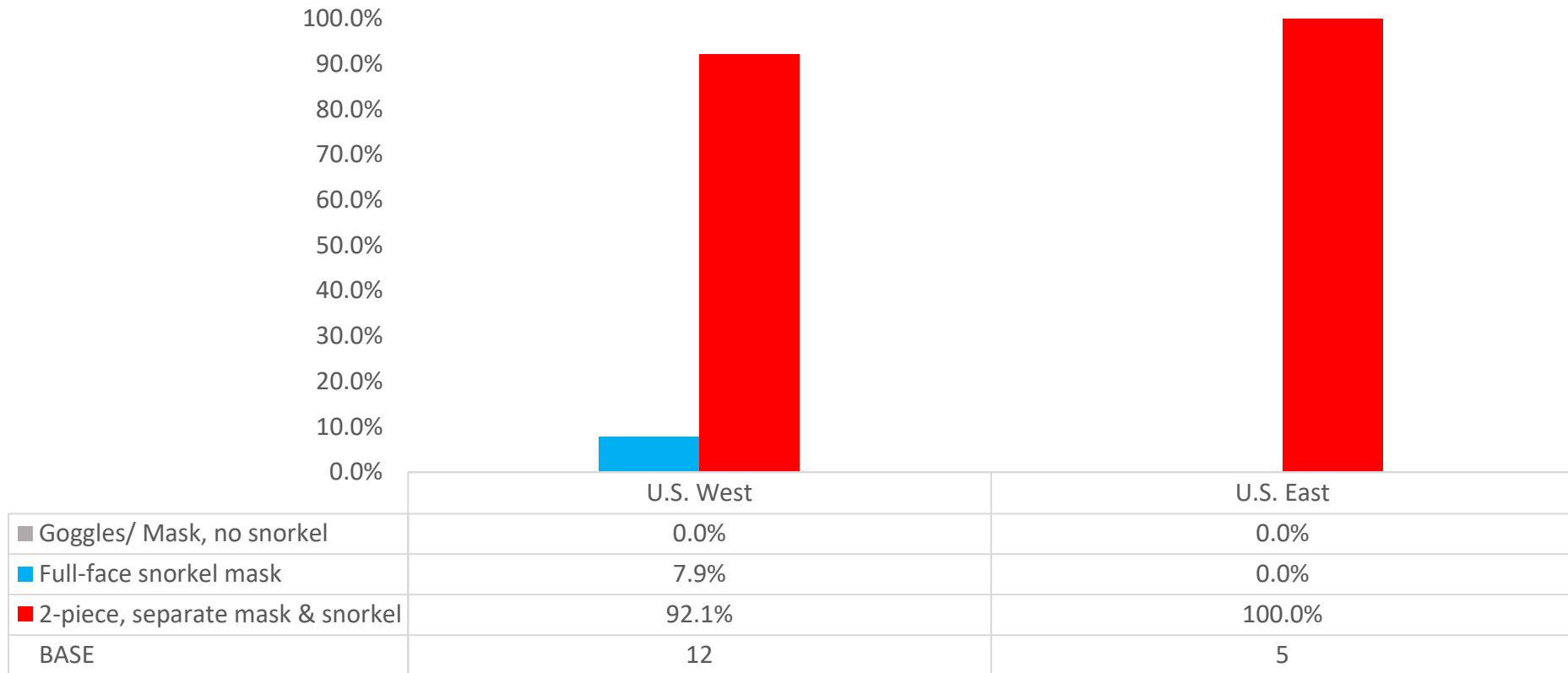
KALAUPAPA NATIONAL HISTORIC PARK EXPERIENCE



MOLOKA'I VISITOR CENTER



SNORKELING EQUIPMENT USED MOLOKA'I

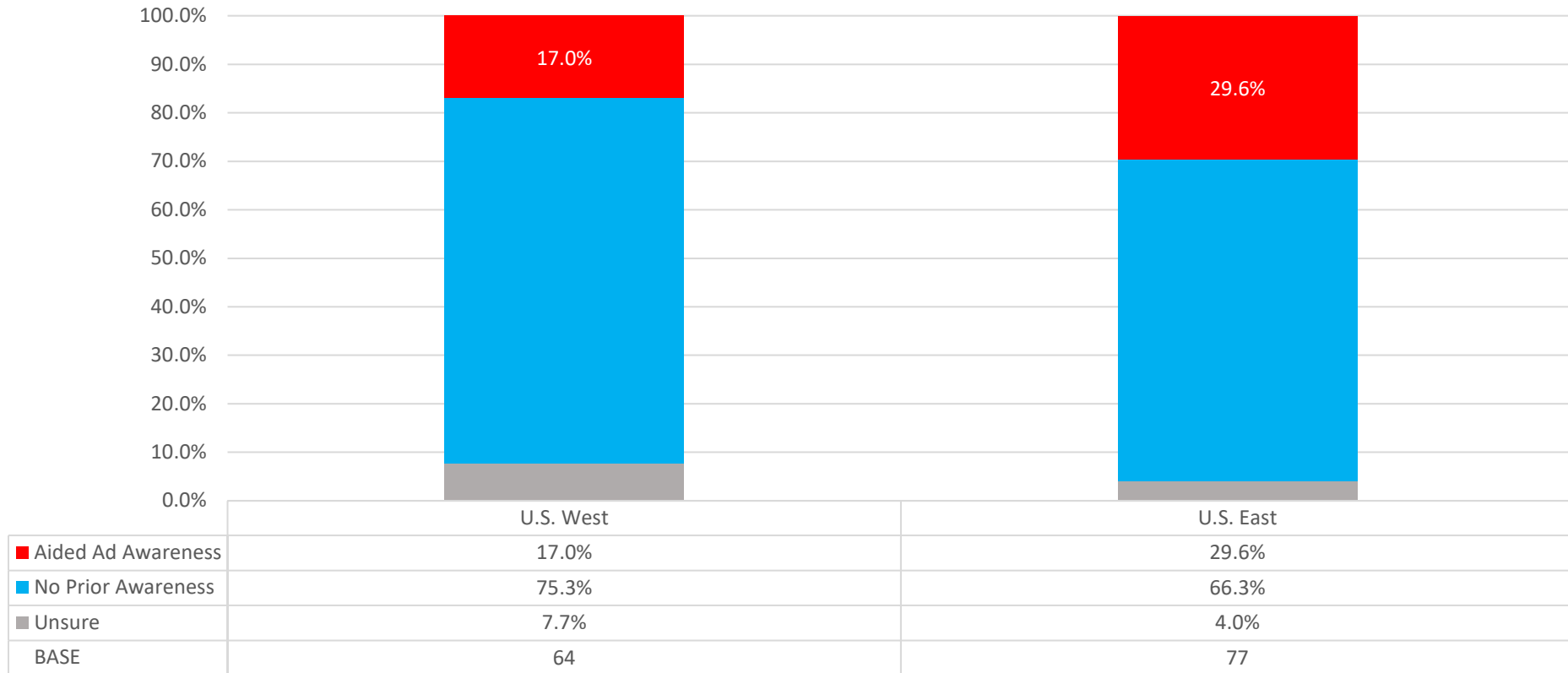


SNORKELING OCEAN SAFETY- MOLOKA'I

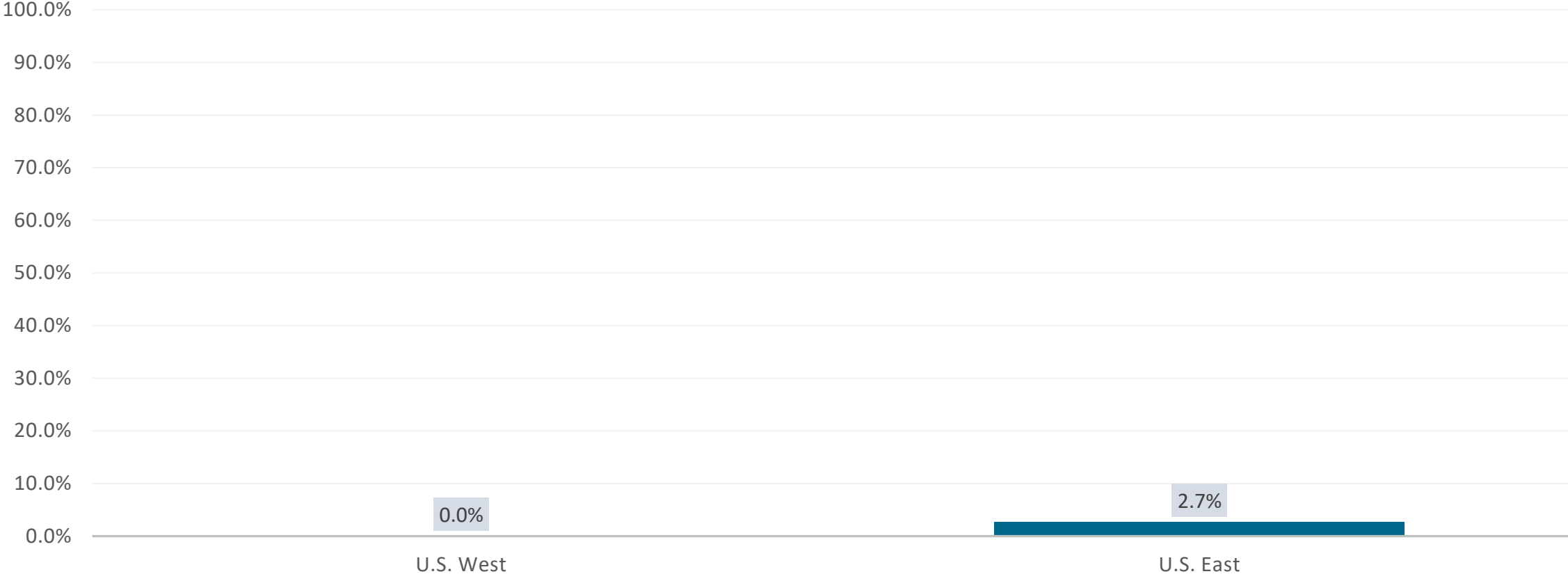
	U.S. West	U.S. East
Did not have to be assisted or rescued	100.0%	100.0%
Yes, needed assistance using 2 piece mask & snorkel	0.0%	0.0%
Yes, while doing another type of ocean activity	0.0%	0.0%
BASE	12	5

Section – Lana‘i

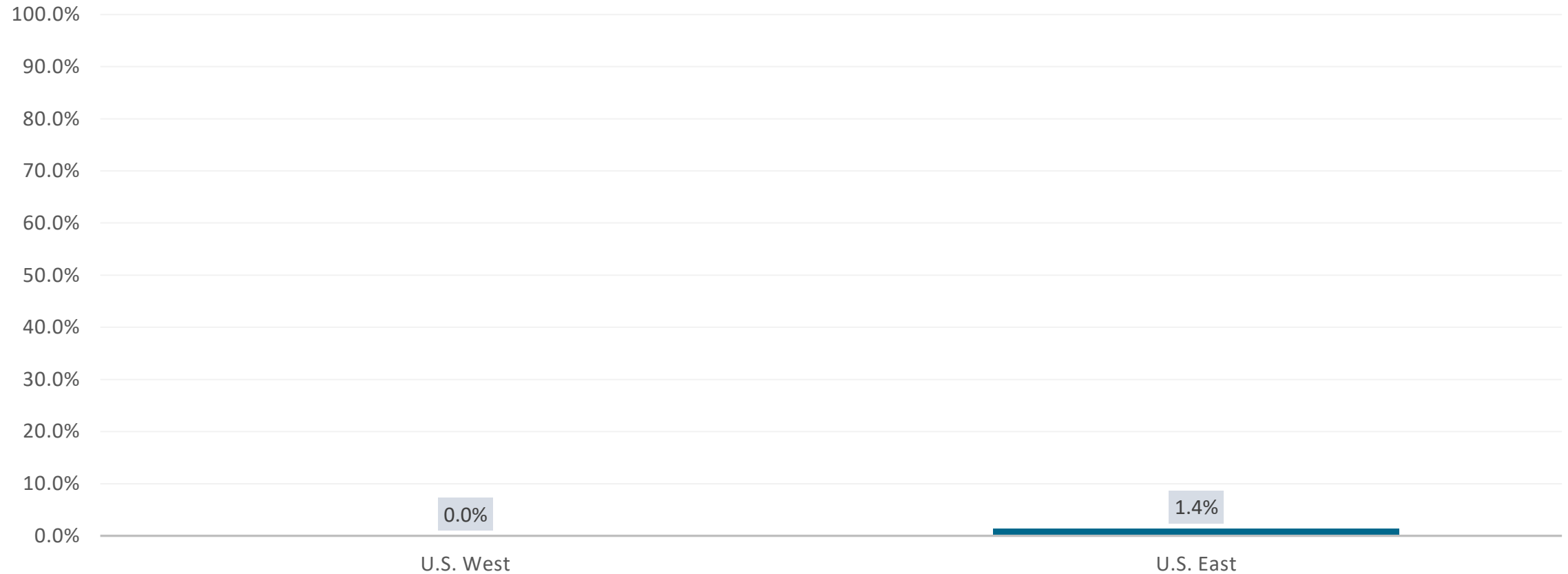
AIDED ADVERTISING AWARENESS LANA'I



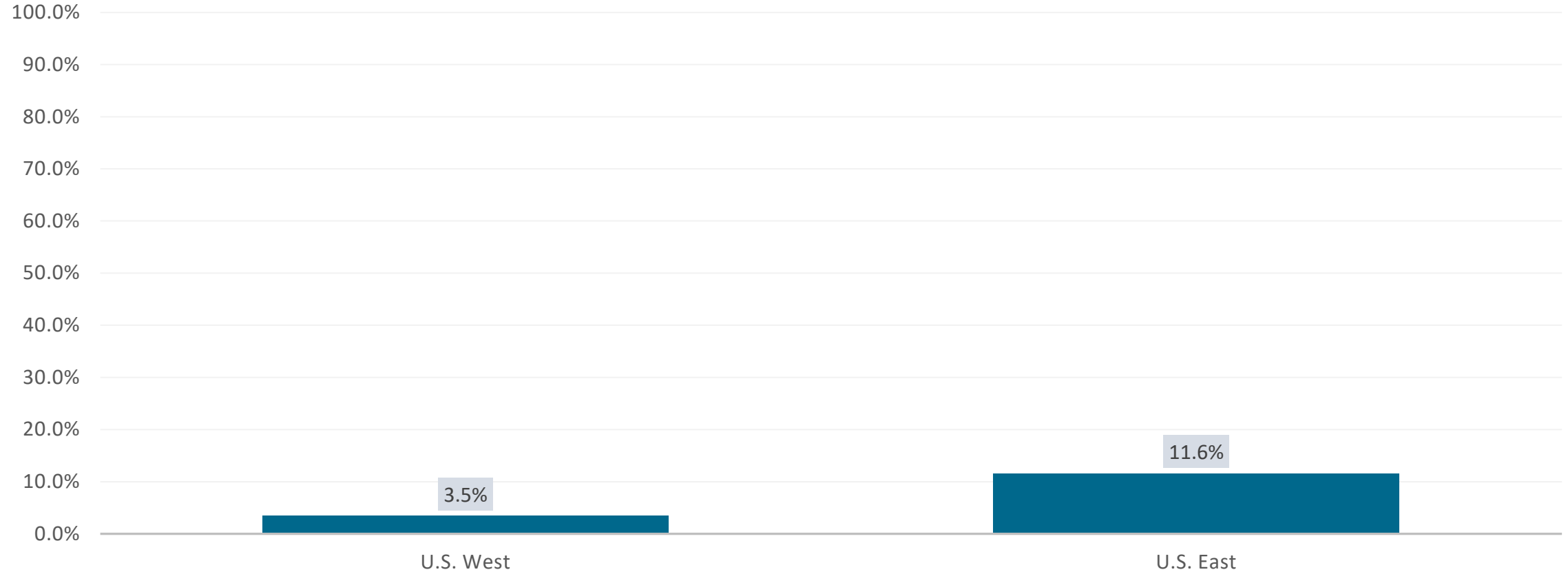
IMPACT OF LOCATION FILMING LANA'I



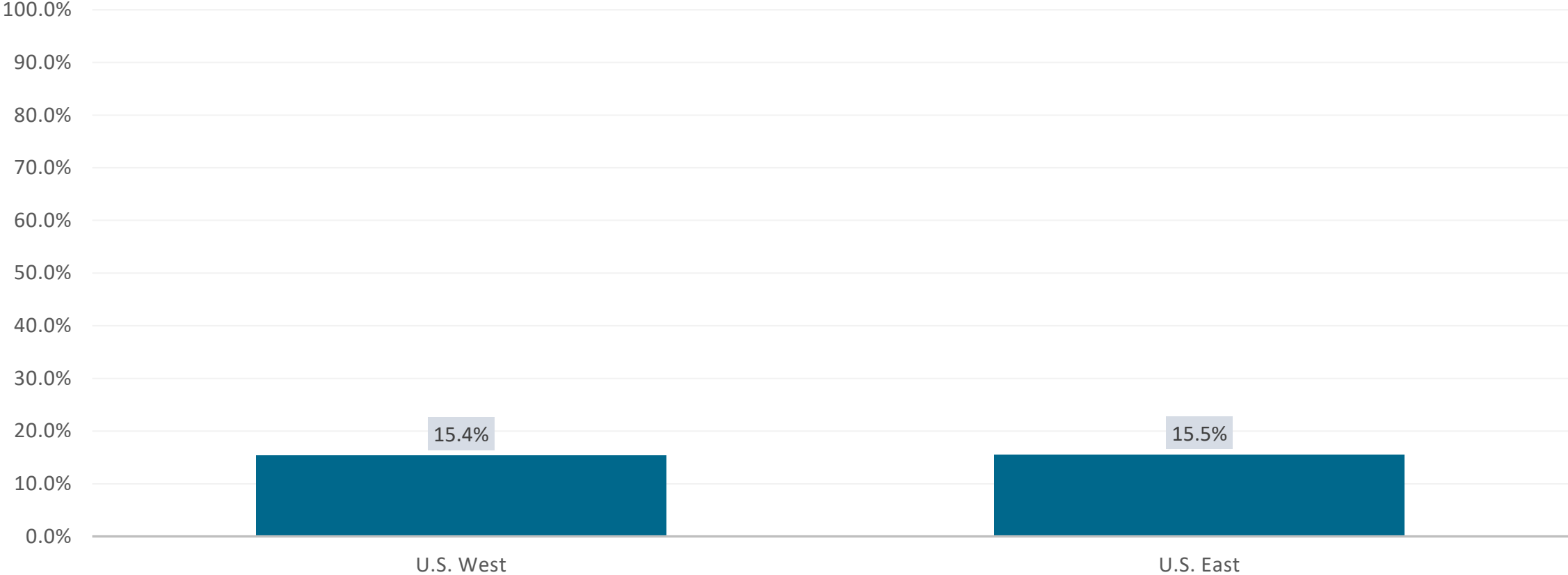
IMPACT OF HAWAIIAN MUSIC LANA'I



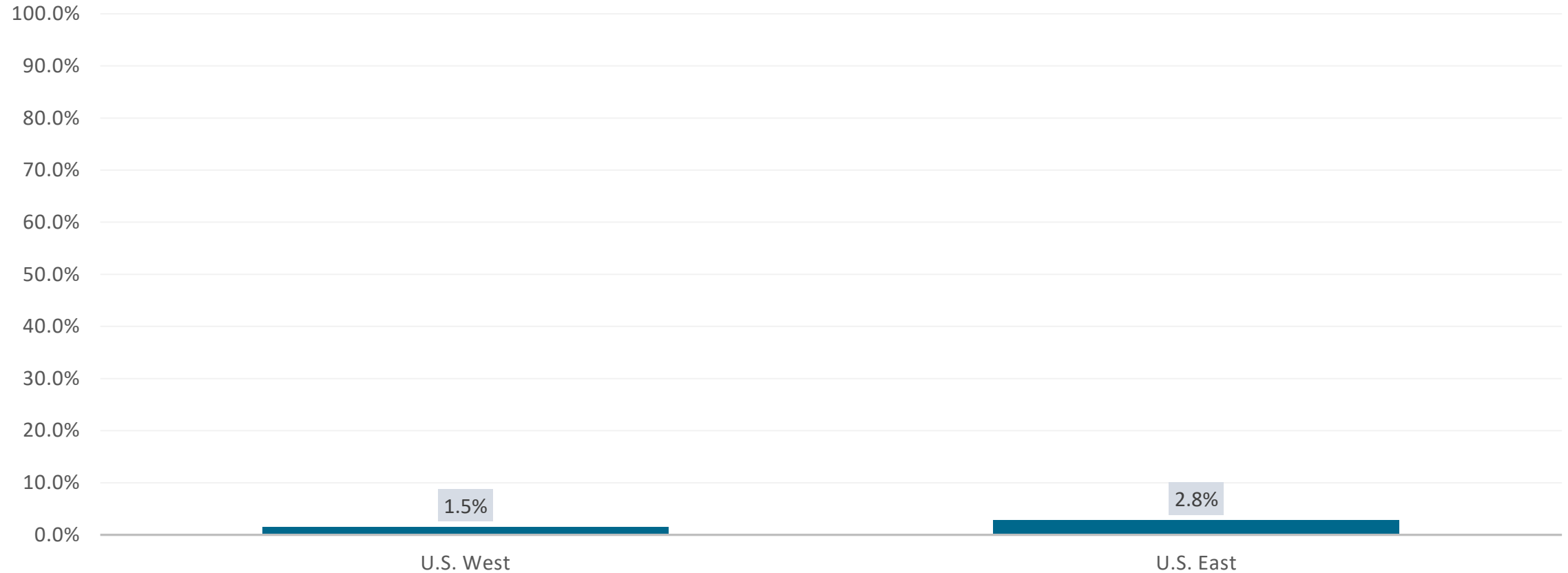
IMPACT OF SOCIAL MEDIA POSTS/VIDEOS LANA'I



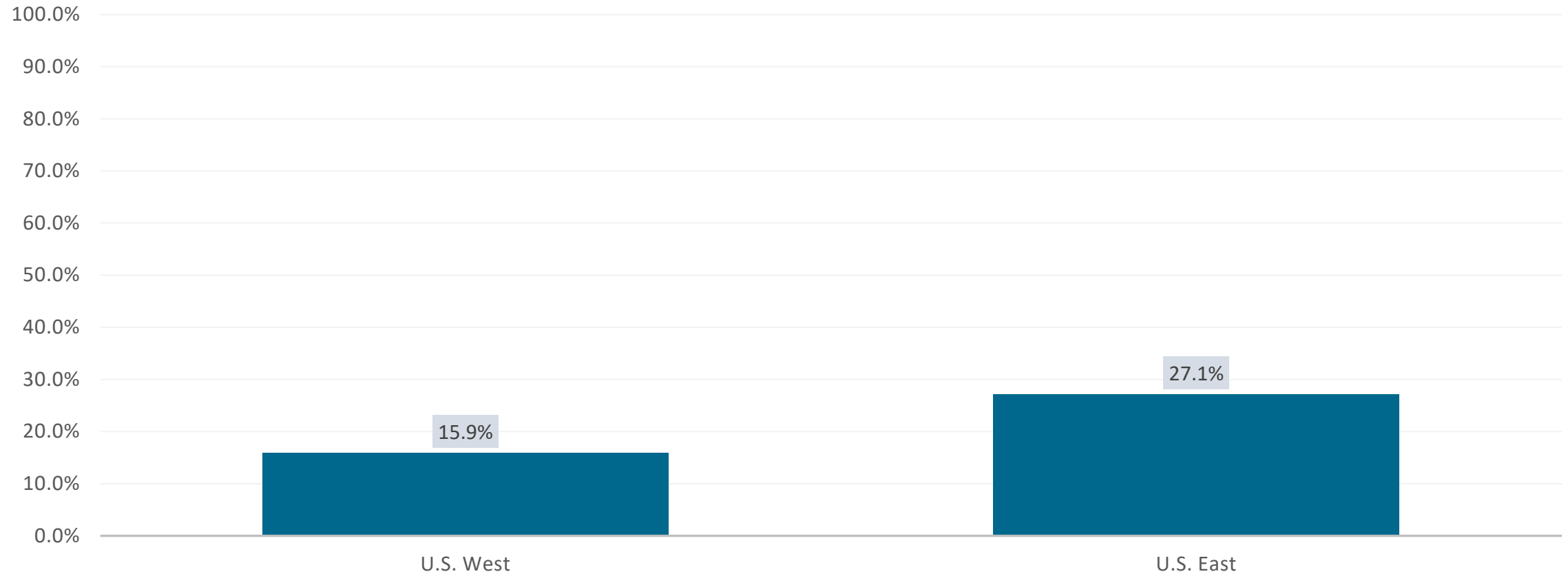
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - LANA'I



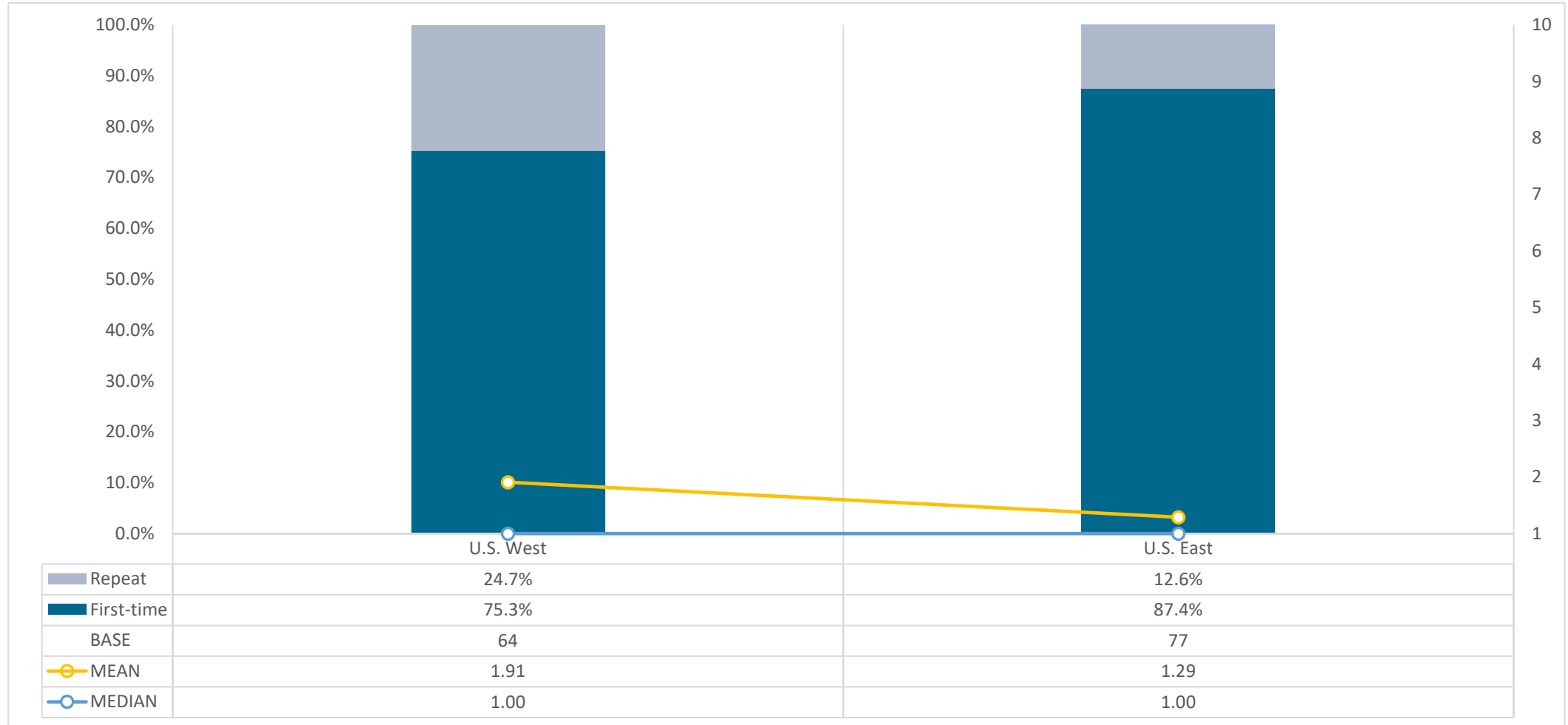
IMPACT OF HAWAIIAN CULTURAL EVENTS LANA'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - LANA'I



1st TIME VS REPEAT VISITOR - LANA'I



ACCOMMODATIONS - LANA'I

	U.S. West	U.S. East
Day trip/ Did not stay overnight	49.8%	45.0%
Hotel/ resort/ villa	44.1%	52.4%
Condominium/ apartment	1.5%	1.4%
Stayed with friends or relatives	1.5%	1.3%
Own property/ second home	1.5%	0.0%
Private Room in Private Home	1.5%	0.0%
Timeshare Unit	1.5%	0.0%
Rental House	0.0%	1.4%
Vacation rental (includes AirBnB, VRBO, etc.)	0.0%	1.3%
Camp Site, Beach	0.0%	1.3%
Hostel	0.0%	1.3%

ACCOMMODATIONS - LANA'I

Vacation rental/ Rental house/ Private room/ Shared room



	U.S. West	U.S. East
■ Visitor area	100.0%	0.0%
■ Residential Neighborhood	0.0%	100.0%
BASE	1	2

ACCOMMODATIONS - LANA'I

Vacation rental/ Rental house/ Private room/ Shared room

	U.S. West	U.S. East
Location	100.0%	0.0%
Availability	0.0%	52.6%
Ability to have travel party members stay together	0.0%	47.4%

STRENGTHS/ POSITIVE ASPECTS LANA'I

	U.S. West	U.S. East
Beach/ ocean		
Nature/ natural beauty/ scenery	17.4%	14.4%
Friendliness of the local people	10.8%	7.7%
Overall customer service/ hospitality/ the people	12.8%	3.8%
Accommodations/ good service from staff	3.1%	14.4%
Accommodations/ was as promised	6.2%	6.6%
Location	6.2%	5.0%
Variety of activities/ attractions/ many choices	4.6%	7.8%
Feeling of the "Aloha Spirit"	3.1%	7.8%
Local culture/ people/ music	3.1%	2.7%
Availability of ground transportation/ tour buses/ limos, availability of taxi cabs etc.	3.1%	1.4%
Food/ restaurant/ good service		

STRENGTHS/ POSITIVE ASPECTS LANA'I

- **Education:** Visitors from U.S. West without a college degree were more pleased with the variety of activities and attractions than those with a college degree.
- **Islands visited:** Visitors from U.S. West whose trip was entirely on Lana'i were more likely to include customer service as a driver of satisfaction. Visitors from U.S. East whose trip was spent entirely on Lana'i were more likely to mention the “aloha spirit” as a driver of trip satisfaction.
- **Household income:** Less affluent (<\$100K) visitors from U.S. West were the most likely to name the beach and ocean as a driver of satisfaction than more affluent visitors.

AREAS OF OPPORTUNITIES - LANA'I

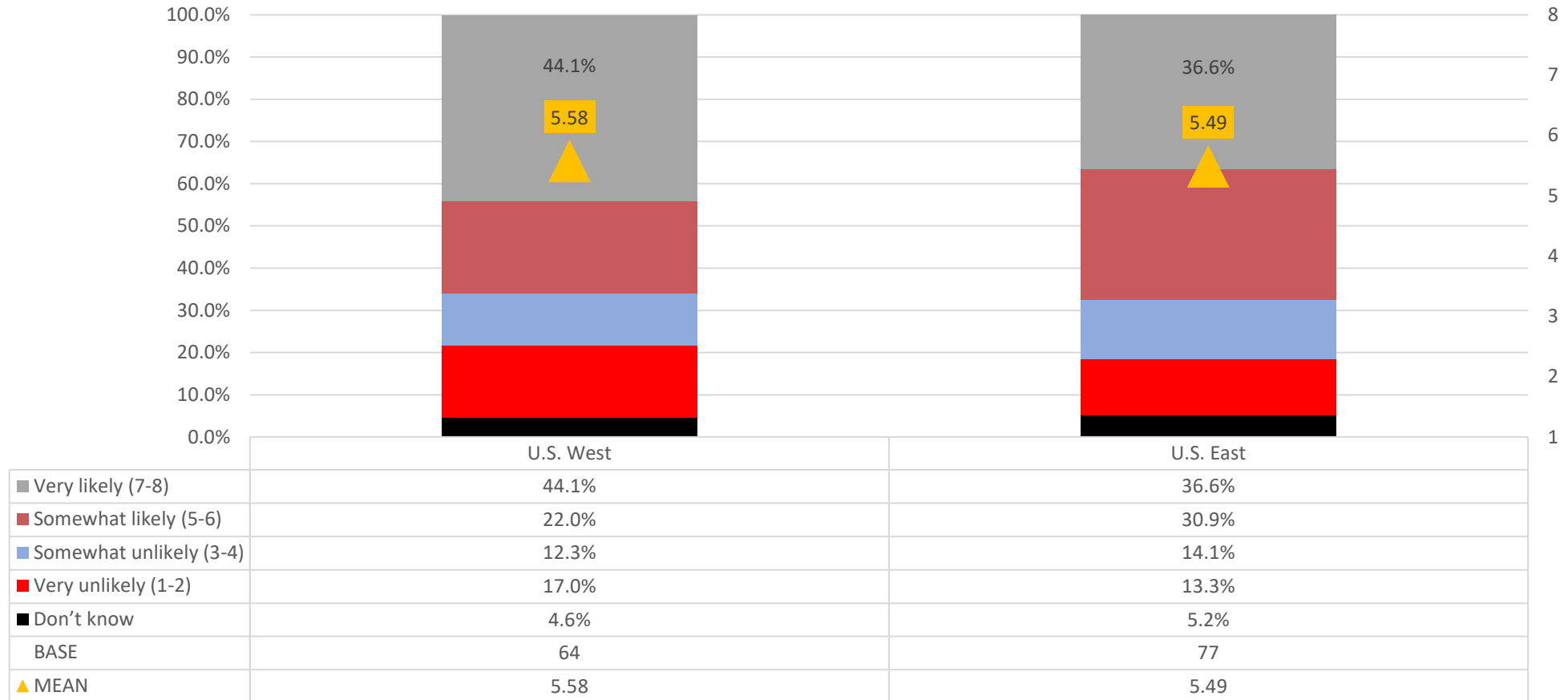
	U.S. West	U.S. East
No negatives/ everything was great		
Food/ restaurant variety/ dining options	20.0%	15.6%
Variety of activities/ attractions	7.7%	8.0%
Would like to experience more local culture	8.2%	2.7%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs etc.	4.6%	6.3%
Coronavirus / COVID 19 pandemic	4.6%	1.3%
Food/ restaurant quality	4.6%	0.0%
Other (please specify)	1.5%	1.3%
Overall customer service/ hospitality/ the people	0.0%	3.9%
Unfriendly/Felt Unwelcome/Japanese Catered to		

AREAS OF OPPORTUNITIES - LANAI

- ***Trips to Hawai'i:*** First-time visitors to Lanai from U.S. West were more likely to include the lack of local culture during their stay as a driver of negative satisfaction.
- ***Age:*** Younger visitors from U.S. West (<35) were more disappointed in not being able to experience more of the local culture during their stay.
- ***Gender:*** Male visitors from U.S. West were less likely to identify any negatives from their stay on island compared to female visitors.
- ***Travel party size:*** Visitors from U.S. West who came by themselves were more likely to have complaints regarding the quality of food and the lack of variety of activities and attractions.

LIKELIHOOD OF RETURN VISIT LANA'I

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



LIKELIHOOD OF RETURN VISIT LANA'I

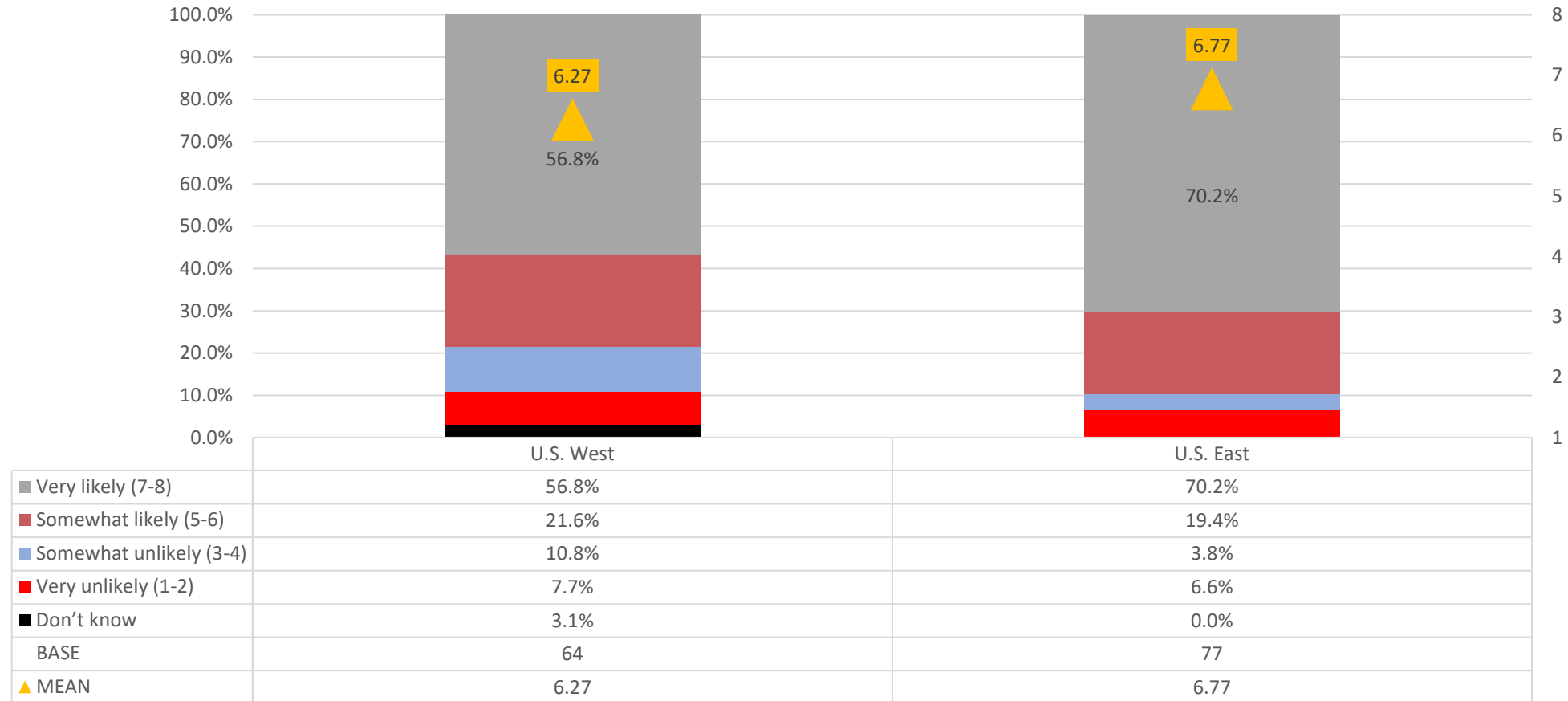
- **Age:** Younger visitors from U.S. West (<35) gave the highest mean scores signifying the greatest likelihood of returning.
- **Gender:** Female visitors from U.S. West expressed a greater likelihood of returning in the next five years than male visitors.

REASONS FOR NOT RETURNING LANA'I

	U.S. West	U.S. East
No reason to return/ nothing new		
Want to go someplace new	31.8%	48.5%
Nothing to do/ boring	13.6%	12.4%
Too expensive/cost	9.1%	19.7%
Not enough value for the price	9.1%	12.0%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	9.1%	3.9%
Flight too long	0.0%	16.3%
Unfriendly people/ felt unwelcome	4.5%	3.9%
Other financial obligations	0.0%	7.7%
Hotel negative	0.0%	3.9%
Poor service		

BRAND/ DESTINATION ADVOCACY LANA'I

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



BRAND/ DESTINATION ADVOCACY LANA'I

- **Islands visited:** Visitors from U.S. West who stayed entirely on Lana'i gave higher mean scores compared to those who also visited other islands during their trip.
- **Age:** Visitors from U.S. West under the age of 50 were stronger brand advocates for Lana'i compared to those over 50 years old.
- **Gender:** Female visitors from U.S. West are more likely to strongly recommend Lana'i than male visitors.

LANA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East
TOTAL	87.2%	95.0%
On own (self guided)	33.9%	45.4%
Helicopter/ airplane	0.0%	2.7%
Boat/ submarine/ whale	31.7%	49.9%
Visit towns	37.4%	34.1%
Limo/ van/ bus tour	13.9%	13.0%
Scenic views/ natural landmark	43.6%	54.5%
Movie/ TV/ film location	0.0%	0.0%

LANA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East
TOTAL		
Beach/ sunbathing	67.6%	79.2%
Bodyboard	10.8%	2.5%
Stand up paddle board	0.0%	0.0%
Surfing	0.0%	0.0%
Canoeing/ kayak	0.0%	0.0%
Swim ocean	52.2%	60.1%
Snorkel	42.5%	53.8%
Freediving	0.0%	1.3%
Windsurf/ Kitesurf	0.0%	0.0%
Jet ski/ Parasail	0.0%	0.0%
Scuba	4.6%	1.3%
Fishing	1.5%	6.7%
Golf		

LANA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East
TOTAL		
Run/ Jog/ Fitness walk	15.9%	24.7%
Spa	12.8%	29.2%
Hiking	34.4%	51.8%
Backpack/Camping	1.5%	0.0%
Agritourism	6.2%	2.5%
Sport event/ tournament	0.0%	0.0%
Park/ botanical garden	13.9%	16.1%
Waterpark	0.0%	0.0%
Mountain tube/ waterfall rappel	0.0%	0.0%
Zip lining	3.1%	2.7%
Skydiving	0.0%	0.0%
All terrain vehicle (ATV)	9.2%	5.3%
Horseback riding		

LANA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East
TOTAL	89.2%	87.4%
Lunch/ sunset/ dinner/ evening cruise	24.7%	34.6%
Live music/ stage show	7.7%	11.7%
Nightclub/ dancing/ bar/ karaoke	1.5%	0.0%
Fine dining	42.5%	53.8%
Family restaurant	17.0%	22.1%
Fast food	9.7%	3.9%
Food truck	1.5%	3.9%
Café/ coffee house	17.0%	26.4%
Ethnic dining	6.2%	5.2%
Prepared own meal	22.0%	11.6%

LANA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East
TOTAL	59.0%	56.0%
Mall/ department store	0.0%	0.0%
Designer boutique	4.6%	5.2%
Hotel/ resort store	18.5%	26.4%
Swap meet/ flea market	0.0%	3.9%
Discount/ outlet store	0.0%	1.4%
Supermarket	15.4%	13.0%
Farmer's market	3.1%	3.9%
Convenience store	12.3%	8.9%
Duty free store	0.0%	0.0%
Local shop/ artisan	34.4%	32.4%

LANA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East
TOTAL	35.9%	50.8%
Historic military site	6.2%	2.5%
Historic Hawaiian site	13.9%	20.7%
Other historical site	1.5%	5.3%
Art museum	1.5%	1.4%
Art galleries/ exhibitions	9.2%	14.1%
Luau/ Polynesian show/ hula show	6.2%	15.9%
Lesson ex. ukulele, hula, canoe, lei making	2.0%	5.4%
Play/ concert/ theatre	0.0%	1.3%
Art/ craft fair	1.5%	3.9%
Festival event	3.1%	1.3%

LANA'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East
TOTAL	67.2%	71.6%
Airport shuttle	31.3%	31.8%
Trolley	0.0%	1.3%
Public bus	0.0%	0.0%
Tour bus/ tour van	12.3%	13.1%
Taxi/ limo	22.5%	19.6%
Rental car	13.9%	27.4%
Ride share	1.5%	1.3%
Bicycle rental	0.0%	1.3%

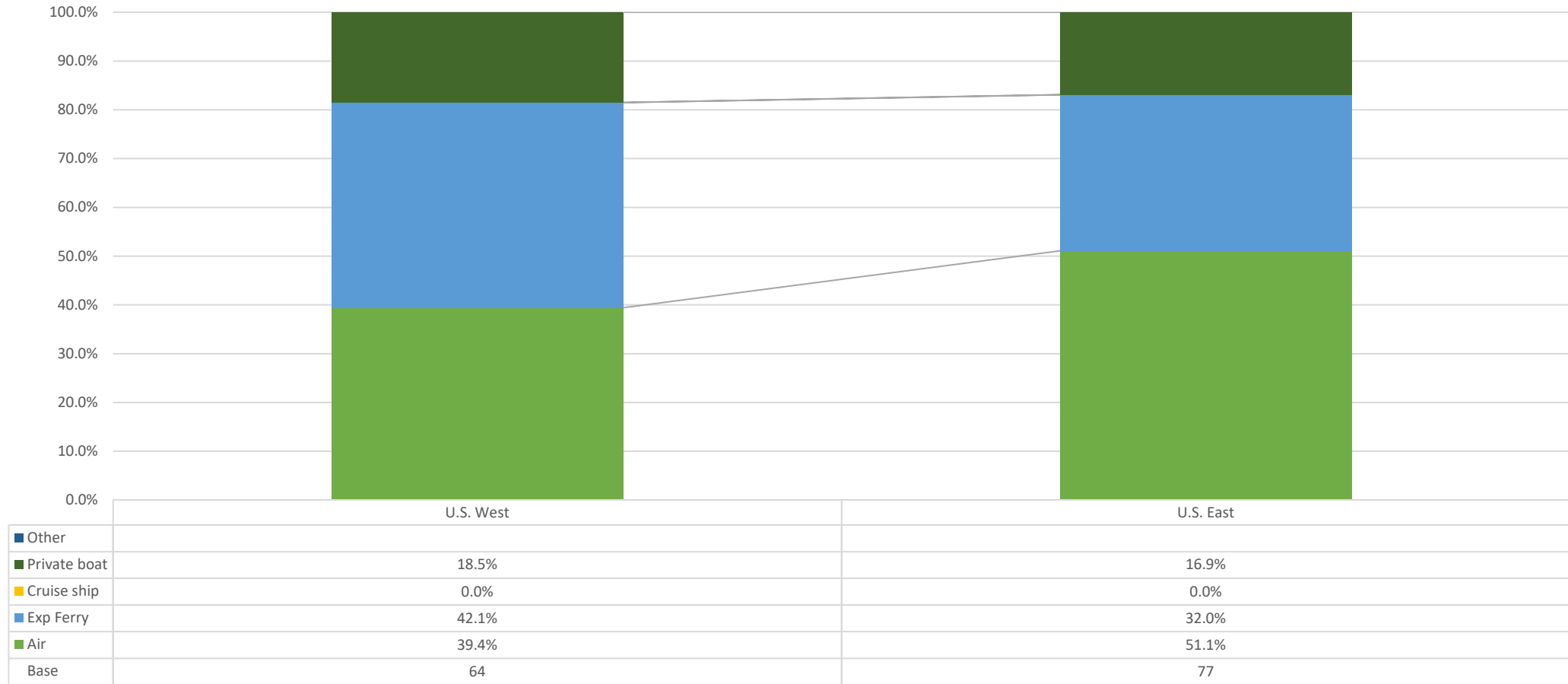
LANA'I ACTIVITIES - OTHER

	U.S. West	U.S. East
TOTAL	4.6%	3.9%
Visit friends/ family	3.1%	2.7%
Volunteer non profit	1.5%	1.3%

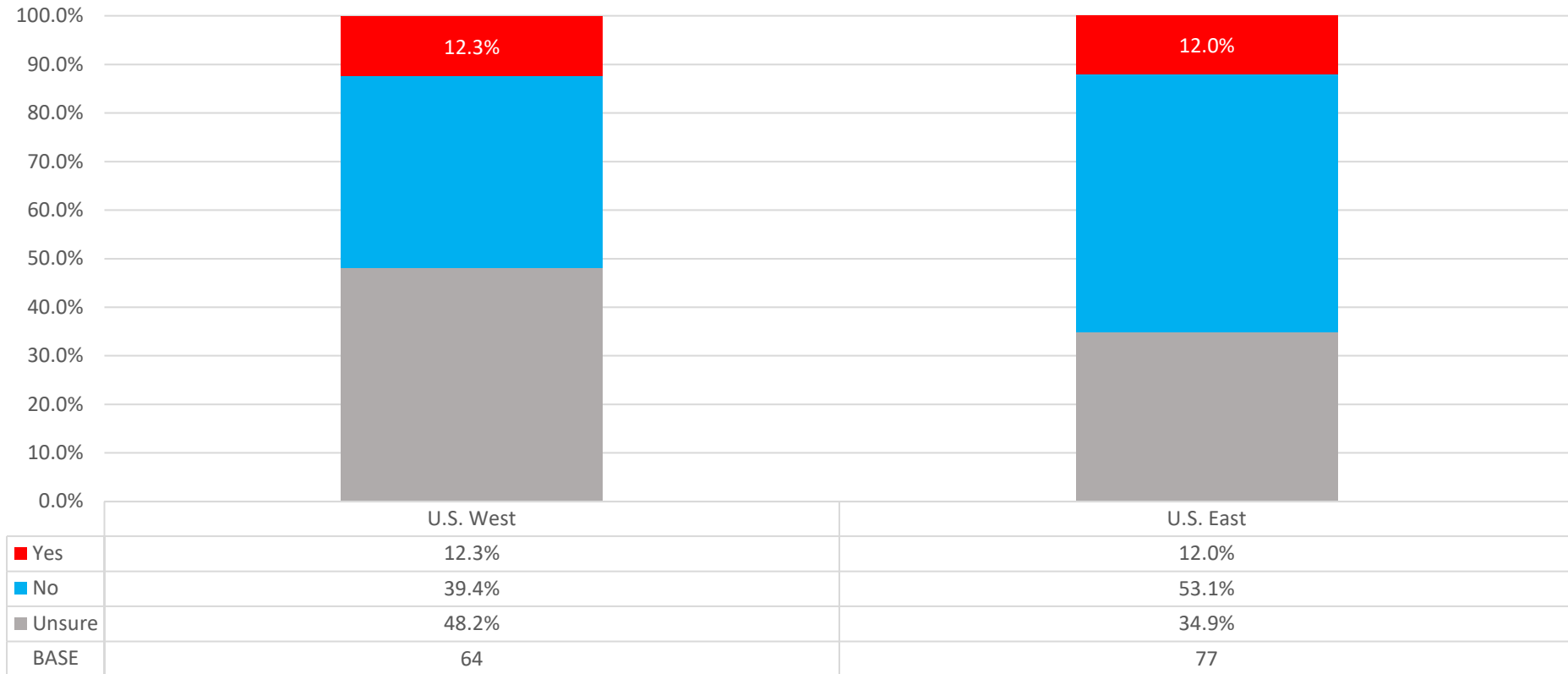
LANA'I ATTRACTIONS

	U.S. West	U.S. East
Hawaiian Village at Kaunolu Fishing Village	3.1%	3.8%
Hulopo'e Bay	39.0%	46.4%
Kaiolohia	24.7%	27.4%
Kanepu'u Preserve	7.7%	4.0%
Keahiakawelo	17.0%	23.7%
Manele Golf Course	28.2%	14.1%
Munro Trail	4.6%	6.6%
Polihua Beach	7.7%	18.0%
Pu'u Pehe	29.3%	38.7%

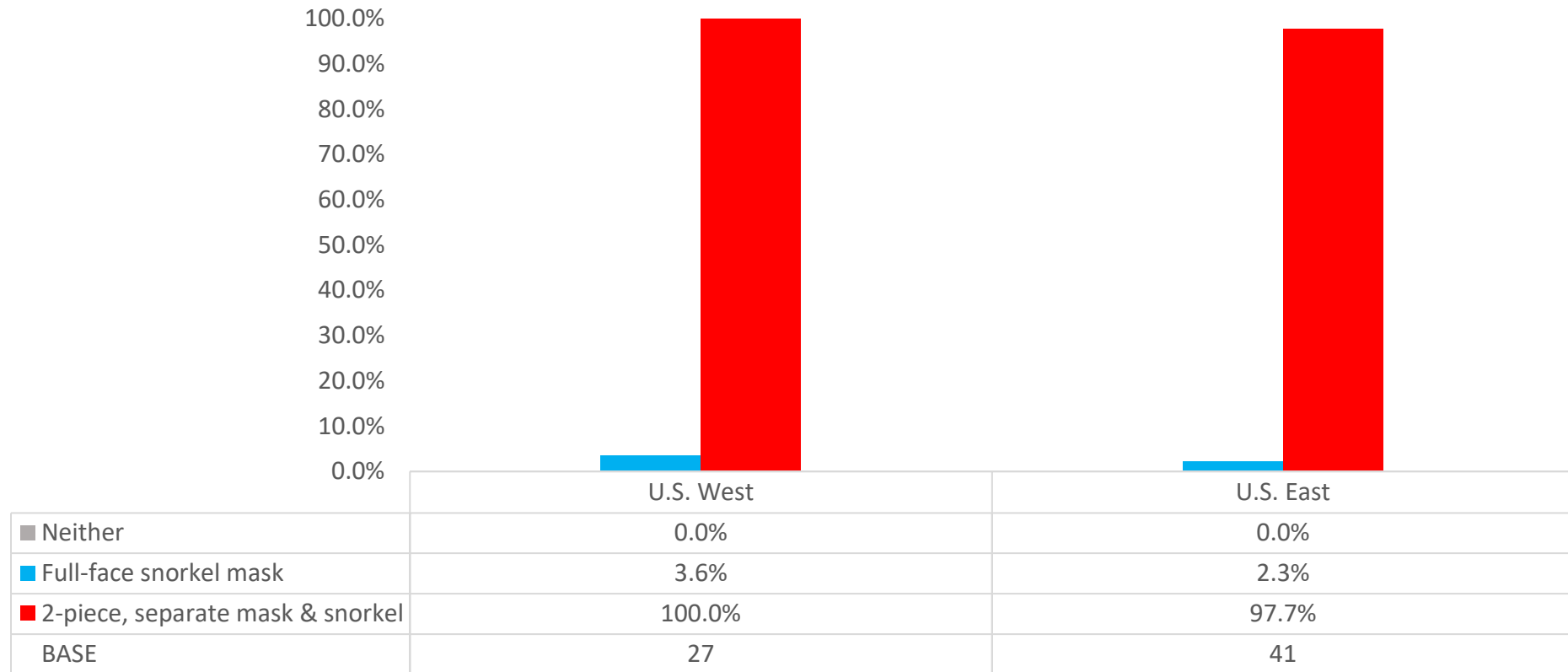
TRANSPORTATION TO LANAI



LANA'I VISITOR CENTER



SNORKELING EQUIPMENT USED LANA'I



SNORKELING OCEAN SAFETY- LANA'I

	U.S. West	U.S. East
Did not have to be assisted or rescued	100.0%	95.1%
Yes, needed assistance using 2 piece mask & snorkel	0.0%	4.9%
Yes, while while using a full face snorkel mask	0.0%	0.0%
BASE	27	41

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.

MMA	Completed	Margin of Error ±
U.S. West	2,655	1.48%
U.S. East	3,521	1.65%
All MMAs	6,176	1.25%

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.

MMA	Completed	Margin of Error ±
U.S. West	958	3.17%
U.S. East	936	3.20%
All MMAs	1,894	2.25%

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.

MMA	Completed	Margin of Error ±
U.S. West	2,072	2.15%
U.S. East	2,258	2.06%
All MMAs	4,330	1.49%

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.

MMA	Completed	Margin of Error ±
U.S. West	1,401	2.62%
U.S. East	1,434	2.59%
All MMAs	2,835	1.84%

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.

MMA	Completed	Margin of Error ±
U.S. West	65	12.16%
U.S. East	80	10.96%
All MMAs	145	8.14%

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.

MMA	Completed	Margin of Error ±
U.S. West	39	15.69%
U.S. East	24	20.00%
All MMAs	63	12.35%