

# Visitor Satisfaction Study

Q2 2019

Prepared for:  
Hawai'i Tourism Authority

# METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major market areas (MMAs) who recently completed a trip to Hawai'i. The sampled MMAs include: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Europe, Oceania, China and Korea.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	2,678	1.89	19.24
<b>U.S. East</b>	2,664	1.90	17.71
<b>Japan</b>	1,413	2.61	43.76
<b>Canada</b>	1,338	2.68	31.58
<b>Europe</b>	444	4.65	26.91
<b>Oceania</b>	618	3.94	25.25
<b>China</b>	83	10.76	8.07
<b>Korea</b>	279	5.87	27.87
<b>All MMAs</b>	9,517	1.00	22.36

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

## METHODOLOGY – OVERALL (cont.)

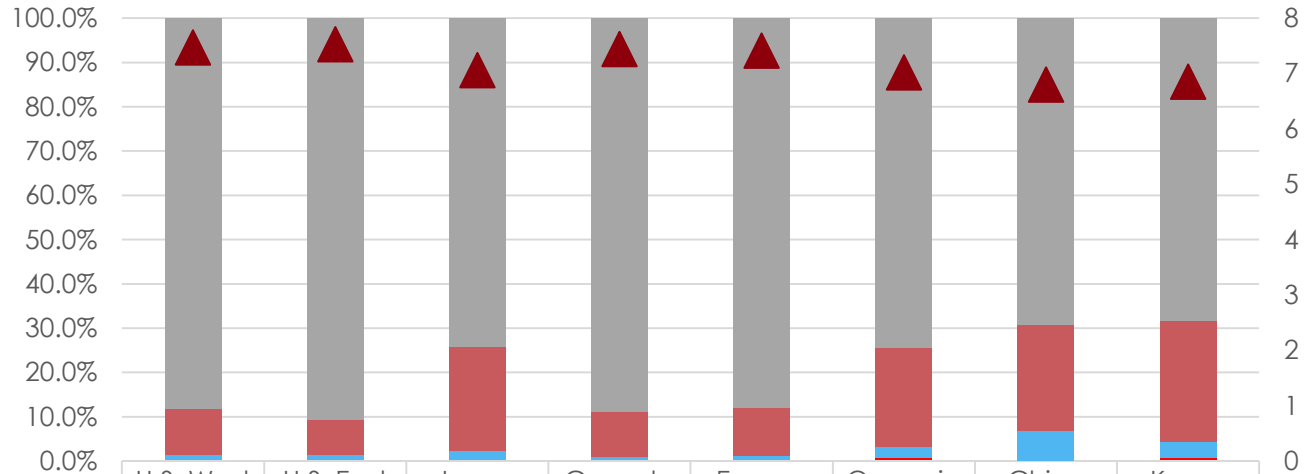
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also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

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and Departure Surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during each quarter. Data from all MMAs were reported as weighted data based on weights generated for 2019 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

# SECTION – VISITOR SATISFACTION

# OVERALL SATISFACTION – MOST RECENT VISIT

8-pt Rating Scale  
8=Extremely Satisfied / 1=Not Satisfied at All



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Extremely satisfied (7-8)	88.3%	90.8%	74.3%	89.0%	88.1%	74.6%	69.2%	68.2%
■ Somewhat satisfied (5-6)	10.3%	7.9%	23.4%	10.0%	10.8%	22.2%	24.1%	27.5%
■ Somewhat dissatisfied (3-4)	1.2%	1.0%	2.1%	0.9%	0.7%	2.6%	6.7%	3.5%
■ Not at all satisfied (1-2)	0.3%	0.3%	0.2%	0.2%	0.4%	0.7%	0.0%	0.8%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.47	7.53	7.06	7.44	7.41	7.02	6.80	6.85

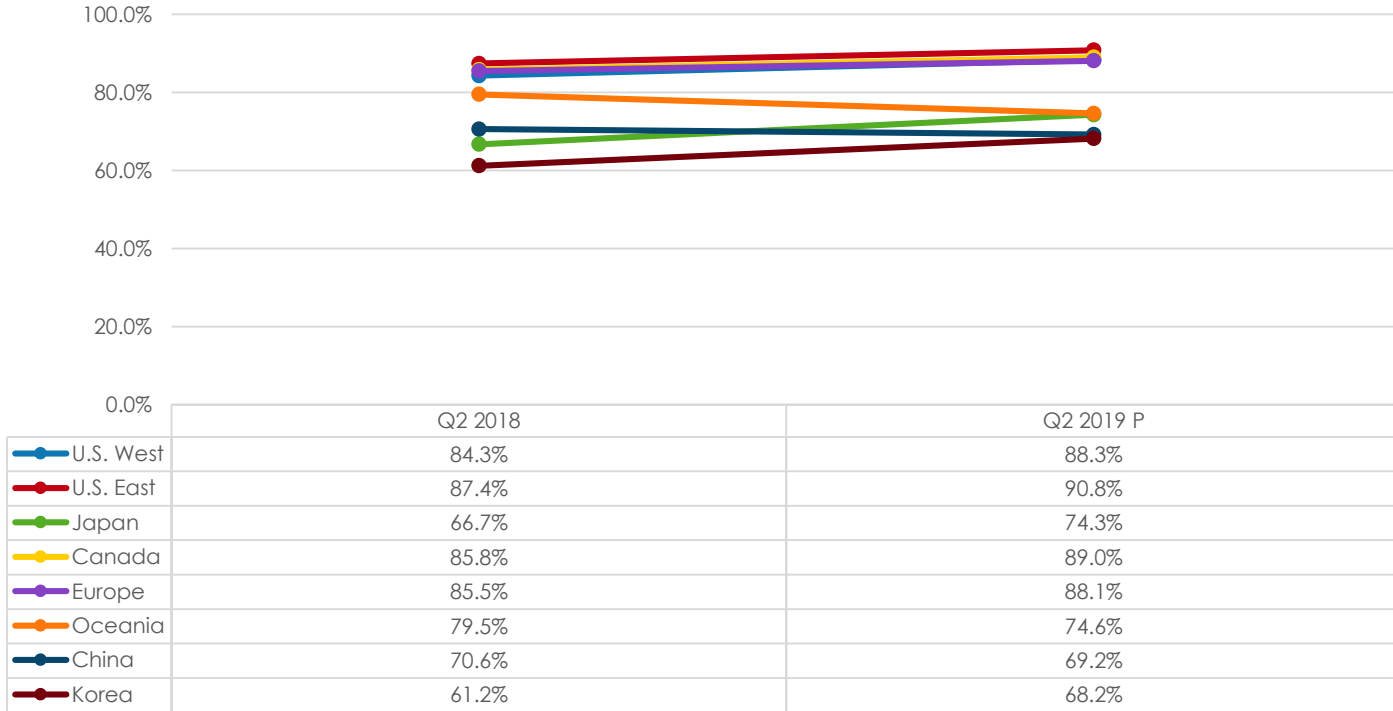
# OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S., Canada, and Europe tended to be the most satisfied with their most recent trip to the State.
- Those in smaller travel parties tended to provide lower satisfaction scores than those in groups of three or more.
- Female visitors on average give higher satisfaction scores than their male counterparts.
- The results show that visitors that travel to multiple islands during their trip generally are more satisfied than those who visited a single island.

# OVERALL SATISFACTION – MOST RECENT VISIT

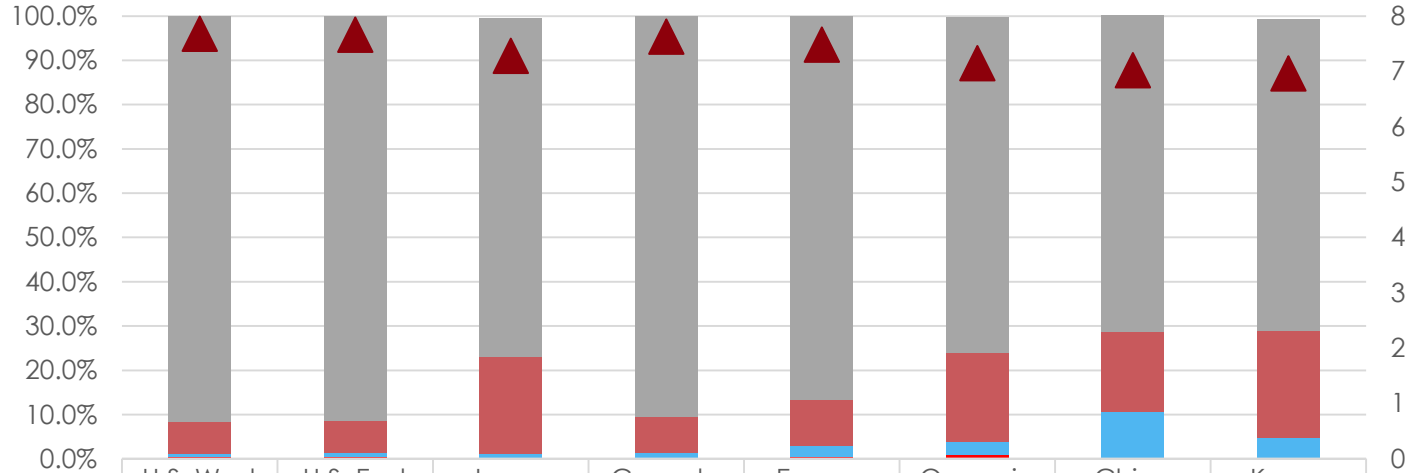
8-pt Rating Scale  
8=Extremely Satisfied / 1=Not Satisfied at All



P= Preliminary Data

# BRAND/DESTINATION – ADVOCACY

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	91.5%	91.4%	76.4%	90.4%	86.5%	75.8%	71.5%	70.4%
■ Somewhat likely (5-6)	7.2%	7.0%	21.8%	8.1%	10.6%	20.3%	18.0%	24.2%
■ Somewhat unlikely (3-4)	0.8%	1.0%	1.1%	1.1%	2.3%	2.7%	10.6%	4.7%
■ Very unlikely (1-2)	0.4%	0.5%	0.1%	0.3%	0.6%	1.0%	0.0%	0.0%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.68	7.66	7.28	7.63	7.48	7.15	7.02	6.96



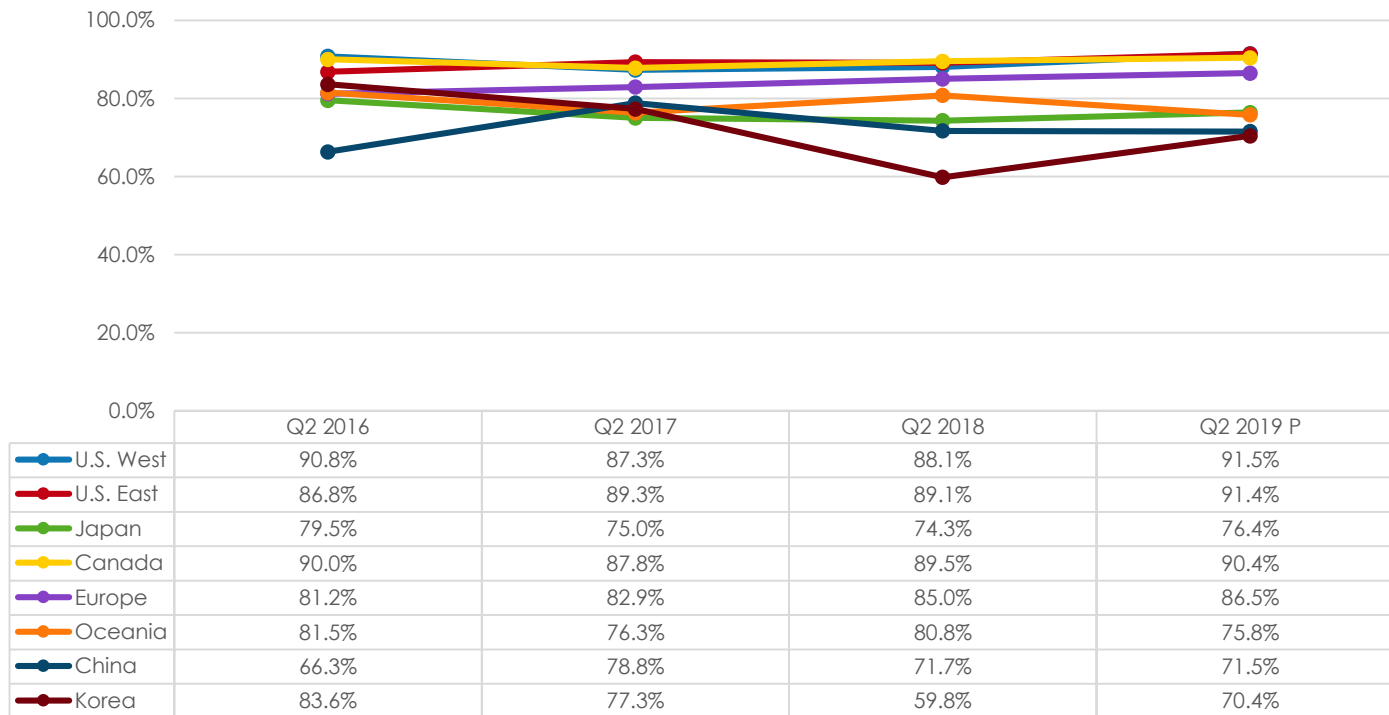
# BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from Asia were the least likely to recommend a trip to Hawai'i to others.
- Repeat visitors were more likely to recommend Hawai'i to others than were first-time visitors.
- Female visitors show a greater likelihood to recommend the destination to others.

# BRAND/DESTINATION – ADVOCACY

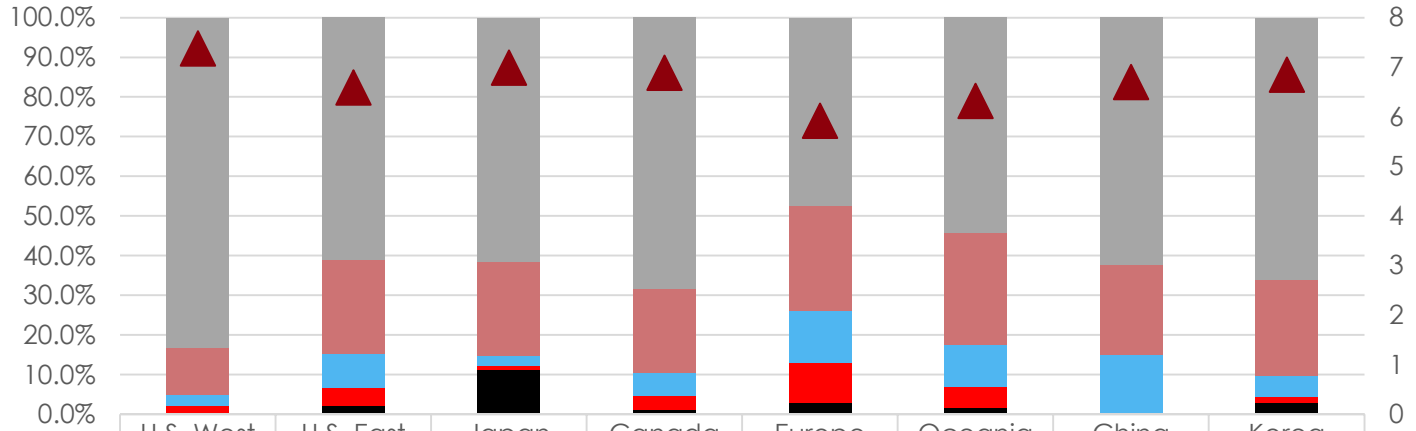
## TRACKING – TOP BOX “VERY LIKELY” (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	83.1%	61.1%	61.5%	68.4%	47.2%	54.2%	62.5%	66.0%
■ Somewhat likely (5-6)	11.8%	23.8%	23.7%	21.3%	26.6%	28.5%	22.5%	24.2%
■ Somewhat unlikely (3-4)	2.9%	8.4%	2.5%	5.7%	13.2%	10.4%	15.1%	5.4%
■ Very unlikely (1-2)	1.8%	4.6%	1.1%	3.5%	9.8%	5.4%	0.0%	1.5%
■ Not Sure	0.3%	2.2%	11.2%	1.2%	3.1%	1.6%	0.0%	2.9%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.38	6.59	6.99	6.89	5.92	6.32	6.70	6.85

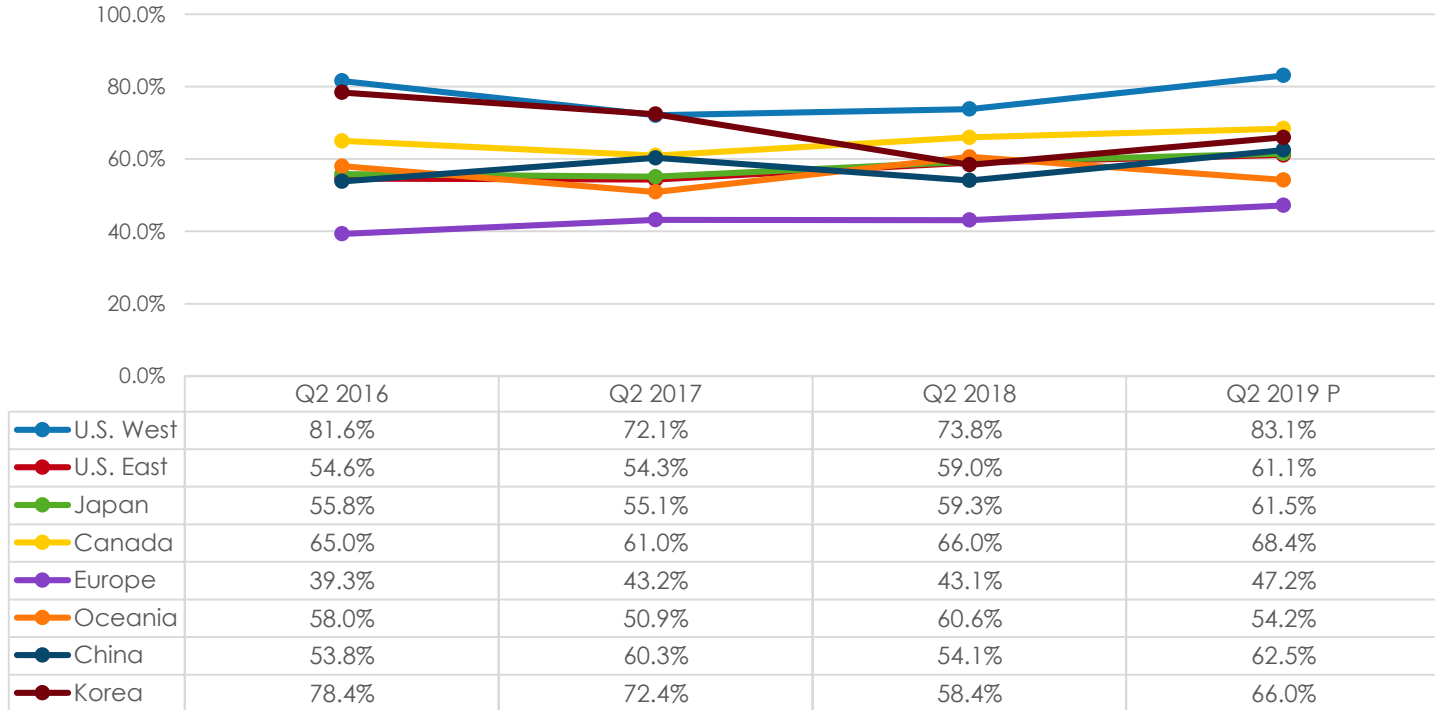
# LIKELIHOOD OF RETURN VISIT

## COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S. West were the most likely to return. Geography/ distance to Hawai'i impacts these results, as scores are lower for visitors from other markets.
- Those here on their honeymoon or to get married are the least likely to indicate a return visit in the next five years.
- More affluent segments (U.S. \$) of the visitor base are more likely to return in the next five years.
- Travelers who visited just a single island on their trip were more likely to express interest in returning in the next five years, more so than those who visited multiple islands during their stay.

# LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

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

Q2 2018	Q2 2019 P
53.7% Too expensive	40.1% Too expensive
31.7% Want to go someplace new	35.0% Want to go someplace new
23.9% Too crowded/ congested/ traffic	23.5% Too crowded/ congested/ traffic
18.2% Too commercialized/ overdeveloped	17.7% Too commercialized/ overdeveloped
26.9% Poor value	17.6% Poor value
13.4% No reason to return/ nothing new	17.5% Other financial obligations
14.5% Other financial obligations	16.8% Five years is too soon
17.5% Flight is too long	11.7% Unfriendly people
14.2% Five years is too soon	10.2% Flight is too long

P= Preliminary Data

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

Q2 2018	Q2 2019 P
47.3% Too expensive	52.6% Too expensive
45.5% Flight is too long	42.0% Want to go someplace new
39.2% Want to go someplace new	41.3% Flight is too long
18.3% Other financial obligations	19.2% Five years is too soon
16.3% Five years is too soon	17.1% Other financial obligations
15.2% Poor value	15.9% Poor value
15.0% Too crowded/ congested/ traffic	12.9% Too crowded/ congested/ traffic
12.3% Too commercialized/ overdeveloped	10.9% Too commercialized/ overdeveloped

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS JAPAN

Q2 2018	Q2 2019 P
45.5% Too expensive	41.1% Too expensive
27.6% Other financial obligations	28.2% Want to go someplace new
27.0% Flight is too long	27.1% Five years is too soon
26.9% Want to go someplace new	26.1% Other financial obligations
26.7% Five years is too soon	22.7% Flight is too long
10.8% No reason to return/ nothing new	

P= Preliminary Data



# UNLIKELY TO RETURN – TOP REASONS CANADA

Q2 2018	Q2 2019 P
44.3% Too expensive	53.6% Too expensive
43.8% Want to go someplace new	45.5% Want to go someplace new
33.9% Flight is too long	39.6% Flight is too long
22.0% Poor value	24.9% Five years is too soon
21.7% Five years is too soon	21.4% Poor value
14.4% Too crowded/ congested/ traffic	15.5% Too commercialized/ overdeveloped
12.9% Other financial obligations	12.5% Too crowded/ congested/ traffic
11.0% Too commercialized/ overdeveloped	11.9% Other financial obligations

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS EUROPE

Q2 2018	Q2 2019 P
65.2% Flight is too long	63.6% Flight is too long
52.0% Too expensive	52.3% Too expensive
33.6% Want to go someplace new	36.7% Want to go someplace new
22.4% Five years is too soon	15.7% Five years is too soon
14.9% Poor value	13.3% Poor value
14.0% Other financial obligations	13.2% Too commercialized/ overdeveloped
12.9% Too commercialized/ overdeveloped	12.4% No reason to return/ nothing new
	10.6% Other financial obligations

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q2 2018	Q2 2019 P
51.7% Want to go someplace new	37.6% Too expensive
45.3% Too expensive	35.6% Want to go someplace new
34.1% Poor value	31.0% Too commercialized/ overdeveloped
27.6% Too commercialized/ overdeveloped	29.9% Poor value
21.4% Too crowded/ congested/ traffic	20.5% Too crowded/ congested/ traffic
18.6% Flight is too long	19.4% No reason to return/ nothing new
17.9% Other financial obligations	18.2% Five years is too soon
17.3% No reason to return/ nothing new	16.7% Flight is too long
14.3% Five years is too soon	

P= Preliminary Data

# UNLIKELY TO RETURN – TOP REASONS CHINA

Q2 2018	Q2 2019 P
43.8% Flight is too long	47.8% Poor value
37.5% Too expensive	29.8% Too expensive
25.0% No reason to return/ Nothing new	
25.0% Poor value	
18.8% Want to go someplace new	
18.8% Too commercialized/ overdeveloped	
18.8% Five years is too soon	
12.5% Too crowded/ congested	

P= Preliminary Data

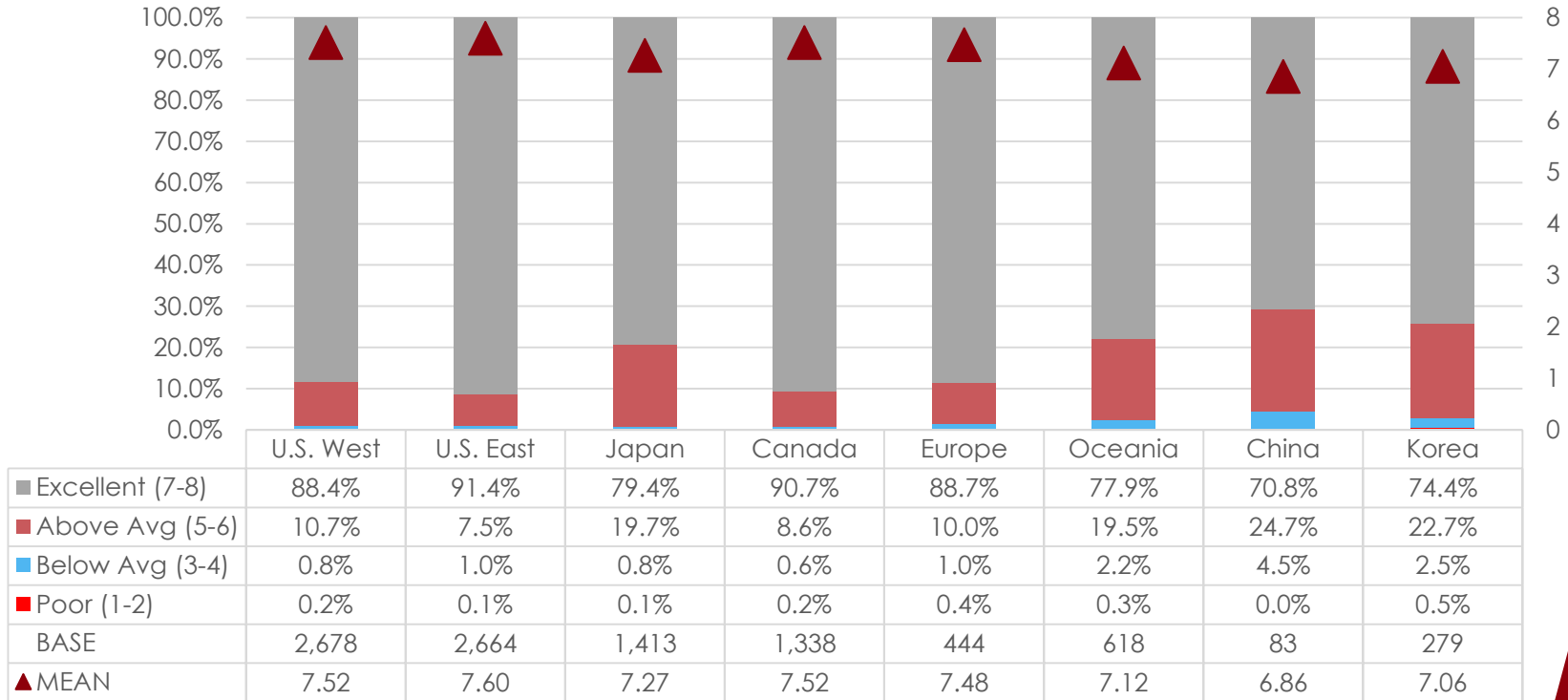
# UNLIKELY TO RETURN – TOP REASONS KOREA

Q2 2018	Q2 2019 P
63.1% Too expensive	72.1% Too expensive
44.5% Poor value	48.3% Flight is too long
41.9% Flight is too long	40.1% Poor value
34.3% No reason to return/ Nothing new	25.2% No reason to return/ Nothing new
29.3% Want to go someplace new	25.2% Other financial obligations
23.8% Five years is too soon	24.5% Too crowded/ congested
15.8% Other financial obligations	21.8% Five years is too soon
13.1% Too commercialized/ overdeveloped	17.7% Poor service
	16.3% Unfriendly people

P= Preliminary Data

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



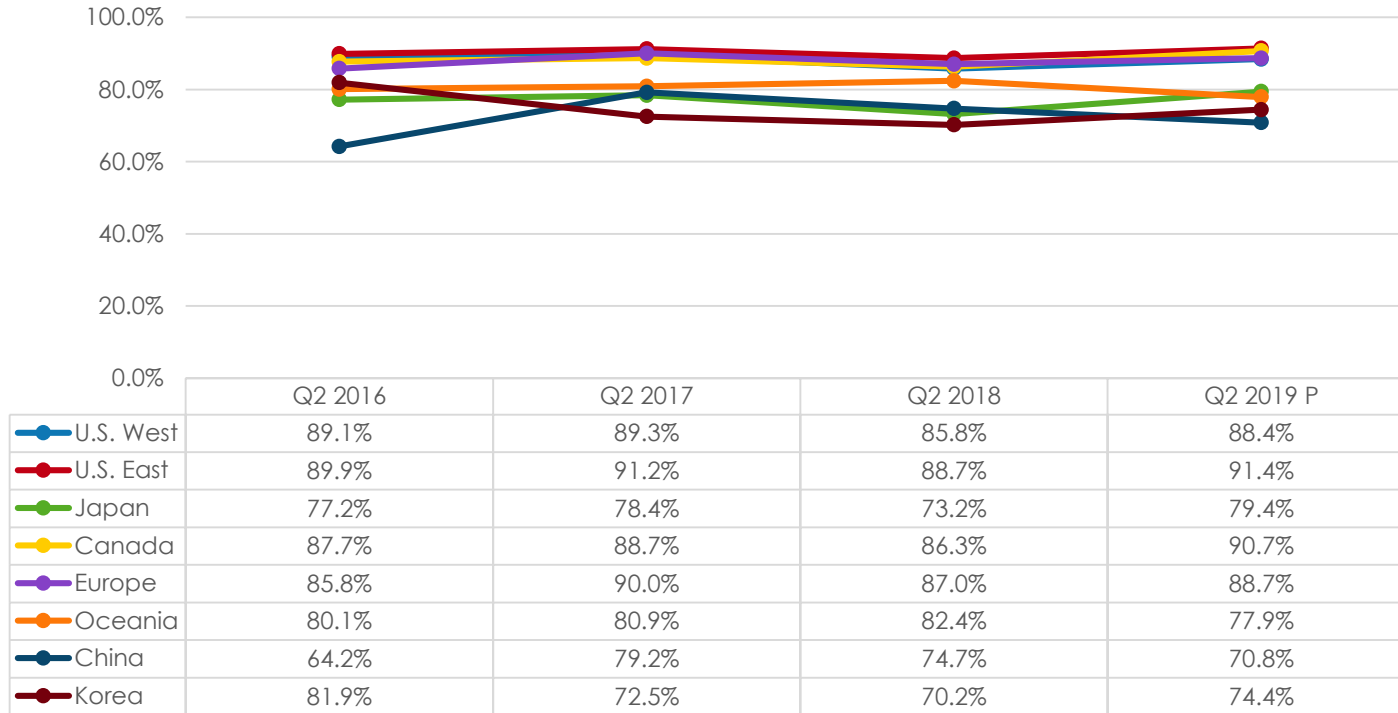
# SATISFACTION – STATE OF HAWAI‘I BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Overall satisfaction tends to be lower among visitors from Asia.
- Females tend to give higher satisfaction scores than their male counterparts.
- Those who visited multiple islands during their tended to give higher satisfaction scores compared to those who visited a single island.

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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

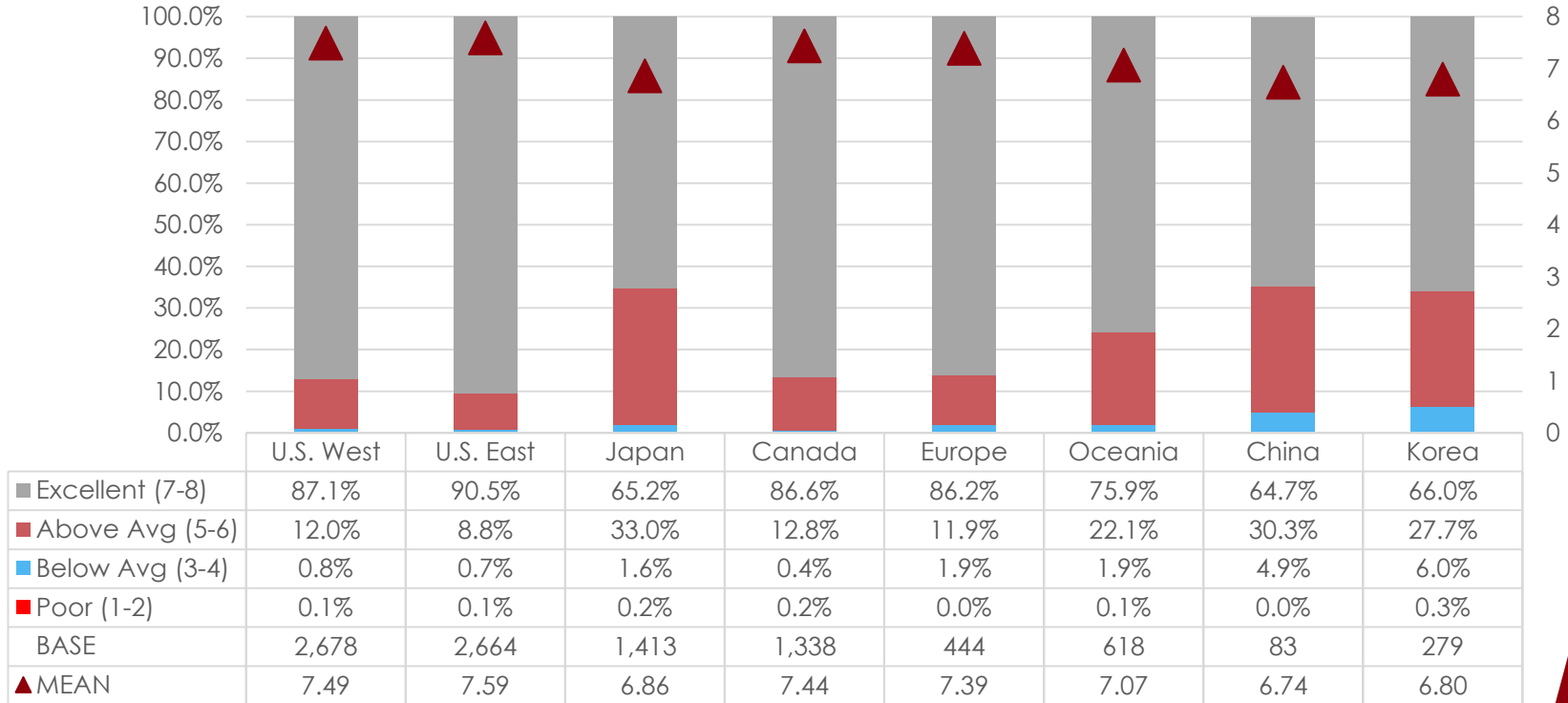


P= Preliminary Data



# OFFERING A VARIETY OF EXPERIENCES

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



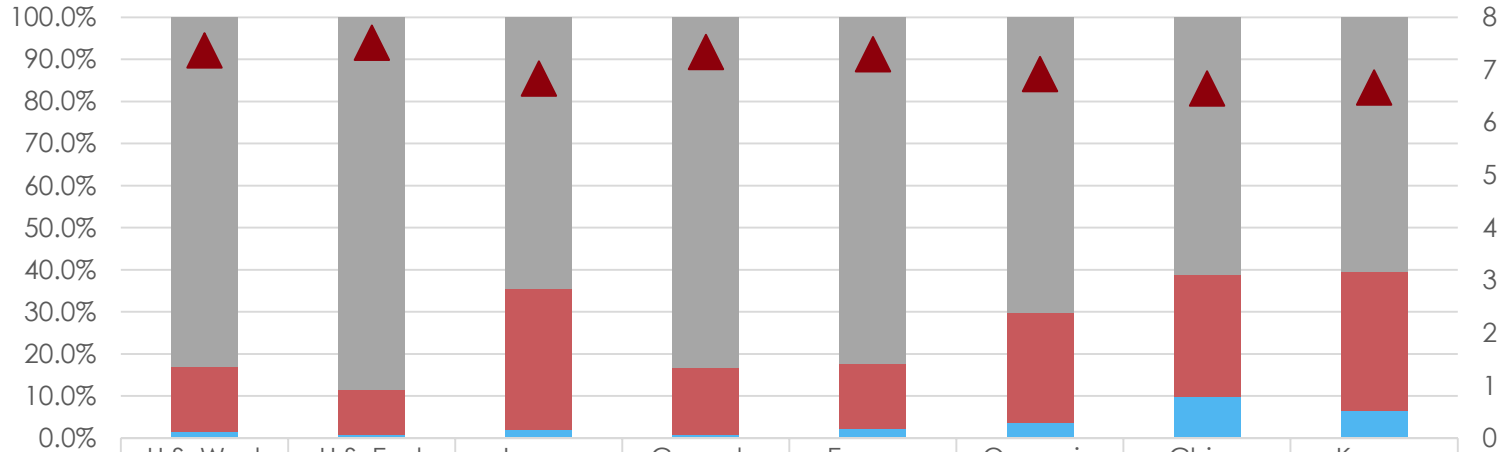
# OFFERING A VARIETY OF EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Satisfaction in this particular area is highest among visitors from the U.S., Canada, and Europe.
- Male respondents appear less satisfied with variety of experiences on their most recent trip.
- The results indicate that visiting multiple islands increases the level of satisfaction with the variety of experiences during their stay.

# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	83.0%	88.5%	64.4%	83.3%	82.4%	70.1%	61.3%	60.4%
■ Above Avg (5-6)	15.6%	10.6%	33.6%	15.8%	15.5%	26.3%	28.8%	33.1%
■ Below Avg (3-4)	1.3%	0.7%	1.6%	0.8%	2.1%	3.6%	9.9%	6.2%
■ Poor (1-2)	0.1%	0.1%	0.4%	0.1%	0.0%	0.0%	0.0%	0.3%
BASE	2,678	2,664	1,413	1,338	444	618	83	279
▲ MEAN	7.37	7.52	6.84	7.34	7.30	6.92	6.65	6.67

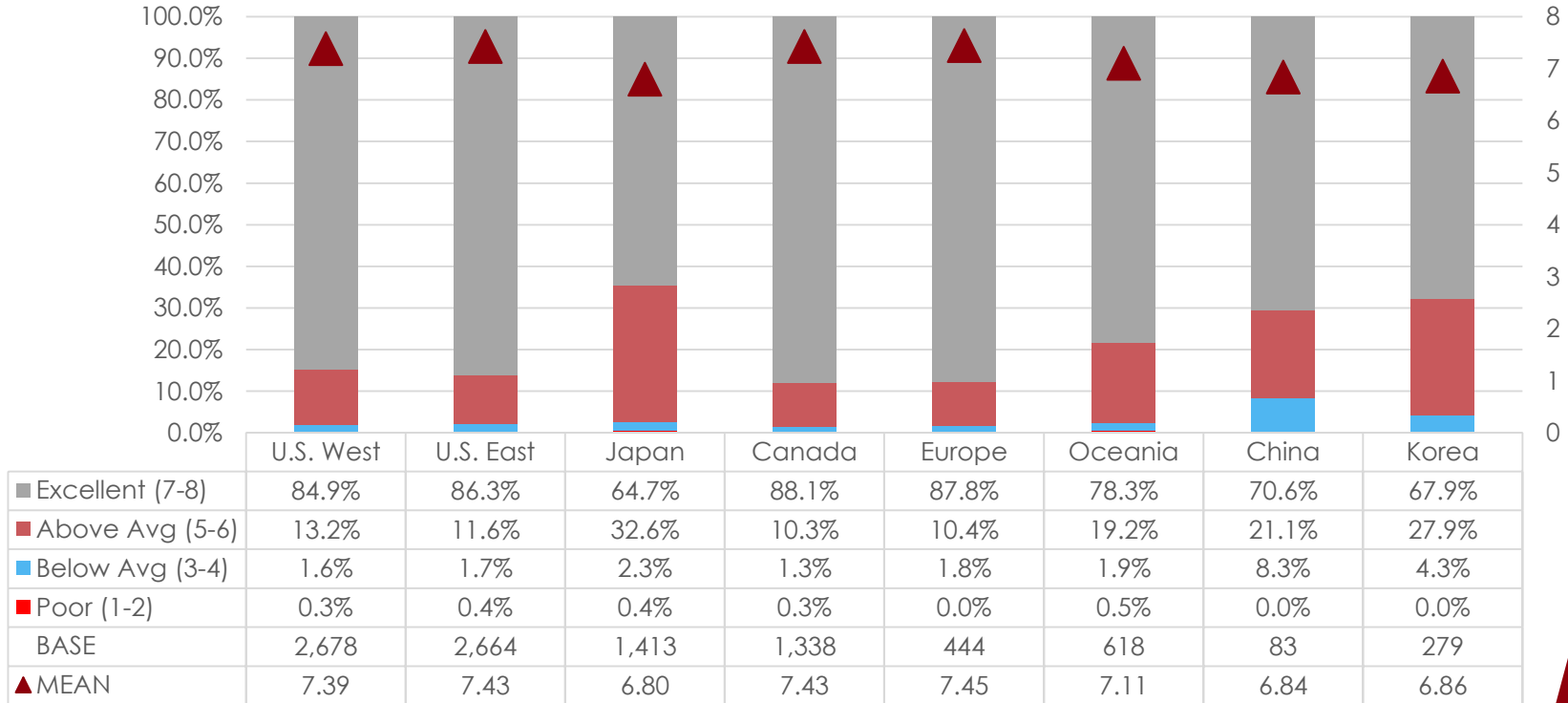
# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Mean scores are lower among visitors from Japan, Korea, and China.
- Those who were traveling in larger travel parties provided higher satisfaction scores in this area.
- Respondents who visited multiple islands during their most recent trip provided higher mean scores when asked about unique and different experiences compare to those who visited a single island.

# BEING A SAFE AND SECURE DESTINATION

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

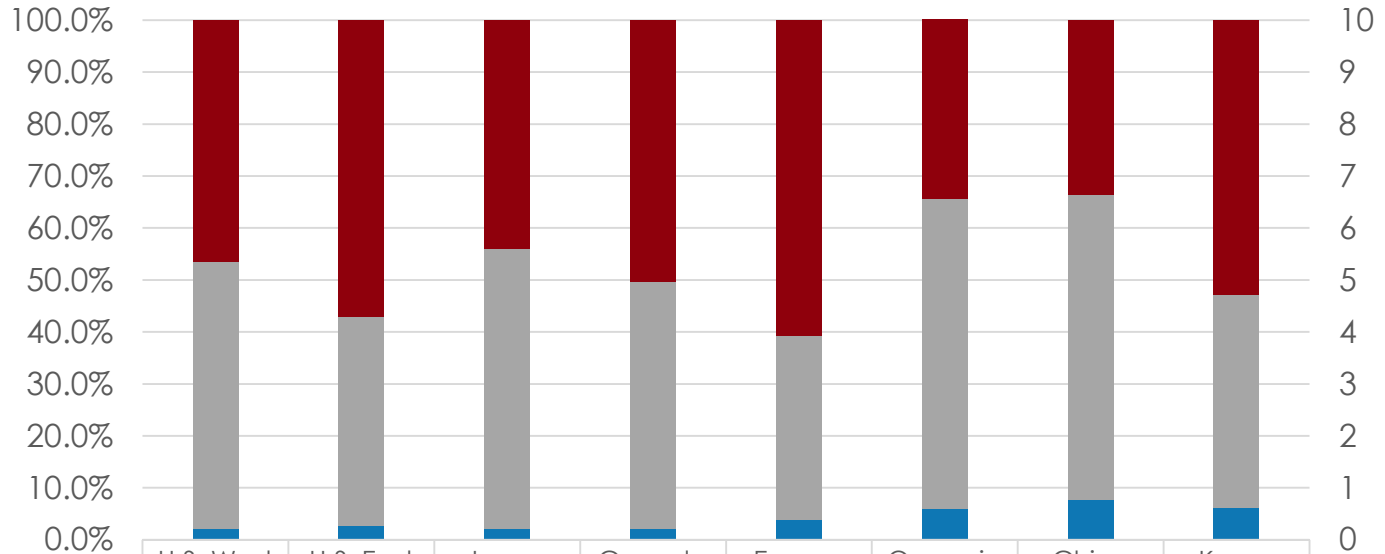


# BEING A SAFE AND SECURE DESTINATION

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S., Canada, and Europe tend to give higher marks as far as feel safe and secure on their most recent trip than do those visitors from other MMAs.
- Younger travelers tend to give lower scores in this area compared to seniors as well as those traveling with families.
- Female visitors generally felt safer during their trip than did male visitors.

# SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Exceeded expectations	46.5%	57.1%	44.0%	50.3%	60.7%	34.5%	33.5%	52.8%
Met expectations	51.3%	40.2%	54.0%	47.7%	35.4%	59.7%	58.9%	41.0%
Did NOT meet expectations	2.2%	2.7%	2.0%	2.0%	3.9%	5.9%	7.6%	6.2%
BASE	2,678	2,664	1,413	1,338	444	618	83	279

# SATISFACTION – HAWAI‘I TRIP EXPECTATIONS

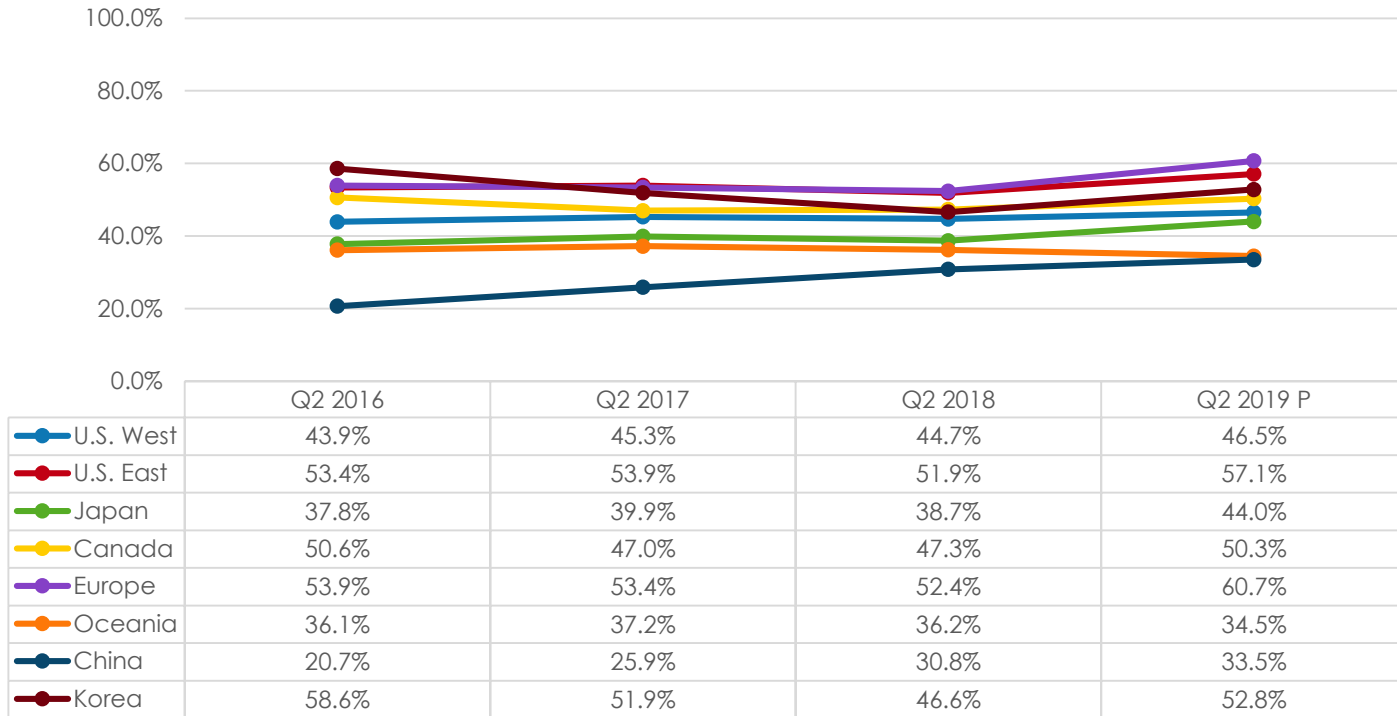
COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

- Visitors from Europe were the most likely to indicate their trip exceeded their expectations while Chinese visitors were the least likely to feel this way.
- Those respondents that went to multiple islands were more likely to indicate the trip exceeded their expectations.



# SATISFACTION – HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX “EXCEEDED EXPECTATIONS”



P= Preliminary Data

# SECTION – ACTIVITIES

## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.1%	94.7%	95.4%	94.9%	95.9%	91.0%	93.9%	95.8%
<b>On own (self guided)</b>	80.9%	78.5%	62.5%	80.8%	70.6%	42.5%	56.0%	71.9%
<b>Helicopter/ airplane</b>	6.0%	10.5%	2.7%	7.5%	16.0%	7.3%	26.5%	5.1%
<b>Boat/ submarine/ whale</b>	23.2%	28.2%	9.9%	25.4%	24.6%	17.1%	30.3%	16.9%
<b>Visit towns/communities</b>	53.3%	52.6%	33.4%	54.1%	46.4%	29.8%	34.4%	38.9%
<b>Limo/ van/ bus tour</b>	7.1%	18.4%	23.8%	11.5%	17.1%	34.5%	18.0%	13.7%
<b>Scenic views/ natural landmark</b>	56.4%	66.7%	20.6%	63.5%	63.8%	48.0%	53.3%	53.1%
<b>Movie/ TV/ film location</b>	4.1%	6.6%	3.4%	6.3%	8.3%	6.3%	29.0%	14.1%

# ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	94.0%	94.3%	96.1%	97.0%	95.8%	90.7%	95.7%	97.1%
<b>Beach/ sunbathing</b>	84.0%	82.0%	72.2%	88.8%	82.5%	70.7%	79.3%	75.7%
<b>Bodyboard/ Standup paddle board</b>	13.9%	10.7%	2.8%	14.8%	9.2%	7.3%	3.8%	9.1%
<b>Surfing</b>	5.8%	6.1%	2.2%	10.5%	10.3%	7.5%	5.4%	11.0%
<b>Canoeing/ kayak</b>	8.5%	7.6%	2.2%	6.6%	8.4%	4.1%	4.5%	3.8%
<b>Swim in the ocean</b>	68.0%	65.4%	31.8%	75.1%	67.8%	56.8%	33.7%	46.7%
<b>Snorkel</b>	48.9%	44.8%	17.7%	54.6%	44.2%	26.2%	29.4%	42.4%
<b>Windsurf/ Kitesurf</b>	0.5%	0.3%	0.1%	0.6%	0.9%	0.1%	1.1%	0.5%
<b>Jet ski/ Parasail</b>	1.9%	2.2%	1.9%	0.9%	0.7%	1.1%	3.4%	4.3%
<b>Scuba diving</b>	3.2%	3.3%	1.7%	2.0%	2.5%	0.2%	1.1%	3.1%
<b>Fishing</b>	3.7%	3.4%	1.2%	1.9%	1.0%	0.8%	2.2%	1.0%
<b>Golf</b>	6.4%	5.9%	8.5%	5.8%	3.3%	3.5%	0.0%	2.3%

## ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	94.0%	94.3%	96.1%	97.0%	95.8%	90.7%	95.7%	97.1%
<b>Run/ Jog/ Fitness walk</b>	24.5%	23.0%	11.1%	25.8%	16.6%	19.9%	16.4%	5.6%
<b>Spa</b>	8.8%	10.4%	6.6%	5.7%	5.4%	5.5%	8.3%	5.0%
<b>Hiking</b>	46.3%	49.9%	16.3%	54.1%	47.5%	18.7%	41.1%	21.0%
<b>Backpack/ camp</b>	1.7%	2.0%	0.1%	2.2%	2.5%	0.7%	6.1%	1.1%
<b>Agritourism</b>	13.1%	17.4%	15.9%	11.7%	10.3%	7.9%	16.2%	18.0%
<b>Sport event/ tournament</b>	1.5%	1.1%	1.6%	1.6%	2.0%	1.9%	0.0%	1.8%
<b>Park/ botanical garden</b>	34.8%	43.9%	22.8%	41.7%	42.5%	30.1%	38.4%	19.7%
<b>Waterpark</b>	1.8%	1.4%	2.0%	1.4%	1.9%	1.2%	4.5%	2.3%
<b>Mountain tube/ waterfall rappel</b>	2.1%	1.8%	0.7%	2.1%	4.4%	1.6%	1.6%	0.0%
<b>Zip lining</b>	6.8%	5.4%	0.9%	3.0%	2.0%	3.7%	1.1%	1.7%
<b>Skydiving</b>	0.7%	0.6%	1.0%	0.4%	1.4%	0.2%	4.5%	3.8%
<b>All terrain vehicle (ATV)</b>	2.7%	3.7%	0.9%	2.1%	3.5%	3.0%	9.9%	9.2%
<b>Horseback riding</b>	1.8%	3.1%	5.0%	1.6%	1.8%	0.8%	2.2%	0.3%

## ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	95.5%	95.3%	97.1%	96.7%	96.2%	96.3%	95.1%	96.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.2%	25.6%	12.3%	24.7%	30.0%	15.4%	62.9%	38.1%
<b>Live music/ stage show</b>	30.2%	36.8%	19.0%	29.9%	32.7%	21.8%	16.9%	12.9%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.8%	9.5%	5.9%	9.0%	8.1%	7.7%	4.5%	4.1%
<b>Fine dining</b>	51.0%	51.7%	44.4%	42.1%	39.5%	36.7%	42.0%	49.4%
<b>Family restaurant</b>	60.9%	59.2%	22.3%	60.0%	43.2%	65.4%	16.0%	33.3%
<b>Fast food</b>	32.3%	35.7%	50.4%	45.9%	43.0%	47.2%	51.9%	53.8%
<b>Food truck</b>	28.8%	31.0%	14.7%	35.5%	33.8%	20.1%	23.1%	44.4%
<b>Café/ coffee house</b>	44.9%	41.8%	48.5%	51.3%	51.3%	59.0%	32.1%	54.2%
<b>Ethnic dining</b>	30.2%	34.3%	9.6%	25.1%	20.9%	11.5%	17.1%	26.5%
<b>Prepared own meal</b>	50.9%	38.5%	18.3%	63.4%	34.5%	21.4%	17.1%	11.8%

## ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	92.9%	93.7%	97.4%	94.9%	94.5%	95.8%	95.1%	95.4%
<b>Mall/ department store</b>	39.8%	40.4%	75.4%	54.9%	50.5%	72.3%	66.3%	72.8%
<b>Designer boutique</b>	16.2%	16.9%	17.1%	16.9%	13.8%	17.4%	16.0%	4.1%
<b>Hotel/ resort store</b>	32.1%	37.2%	36.3%	26.5%	26.8%	31.9%	24.7%	26.3%
<b>Swap meet/ flea market</b>	15.7%	14.8%	3.3%	17.0%	5.0%	8.4%	1.6%	2.1%
<b>Discount/ outlet store</b>	15.5%	16.3%	20.4%	21.4%	18.3%	46.0%	38.0%	57.2%
<b>Supermarket</b>	64.7%	55.3%	67.6%	67.9%	66.0%	48.5%	64.9%	53.7%
<b>Farmer's market</b>	35.2%	27.8%	21.3%	40.0%	29.1%	15.3%	13.7%	8.9%
<b>Convenience store</b>	44.7%	47.5%	39.8%	50.1%	34.3%	60.3%	38.4%	46.6%
<b>Duty free store</b>	3.3%	3.9%	30.8%	6.3%	5.0%	10.1%	45.2%	45.8%
<b>Local shop/ artisan</b>	63.8%	65.3%	13.3%	65.5%	58.5%	49.3%	32.6%	16.4%

## ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	66.8%	74.9%	55.7%	69.0%	70.1%	70.3%	79.3%	55.0%
<b>Historic military site</b>	14.0%	28.8%	15.7%	17.5%	29.6%	41.3%	48.5%	15.1%
<b>Other historical site</b>	24.8%	31.5%	18.0%	25.0%	26.3%	18.3%	30.8%	19.4%
<b>Museum/ art gallery</b>	16.2%	15.8%	4.9%	15.8%	16.0%	16.0%	18.2%	5.8%
<b>Luau/ Polynesian show/ hula show</b>	30.6%	43.7%	15.3%	34.1%	32.8%	28.7%	17.3%	23.8%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	7.1%	8.5%	6.9%	7.4%	9.4%	5.9%	8.3%	5.7%
<b>Play/ concert/ theatre</b>	4.1%	3.6%	3.2%	3.9%	2.8%	3.4%	1.1%	4.5%
<b>Art/ craft fair</b>	14.2%	11.6%	3.1%	11.6%	7.0%	4.7%	6.1%	4.9%
<b>Festival event</b>	5.2%	5.1%	2.7%	4.9%	5.4%	4.5%	1.6%	2.1%

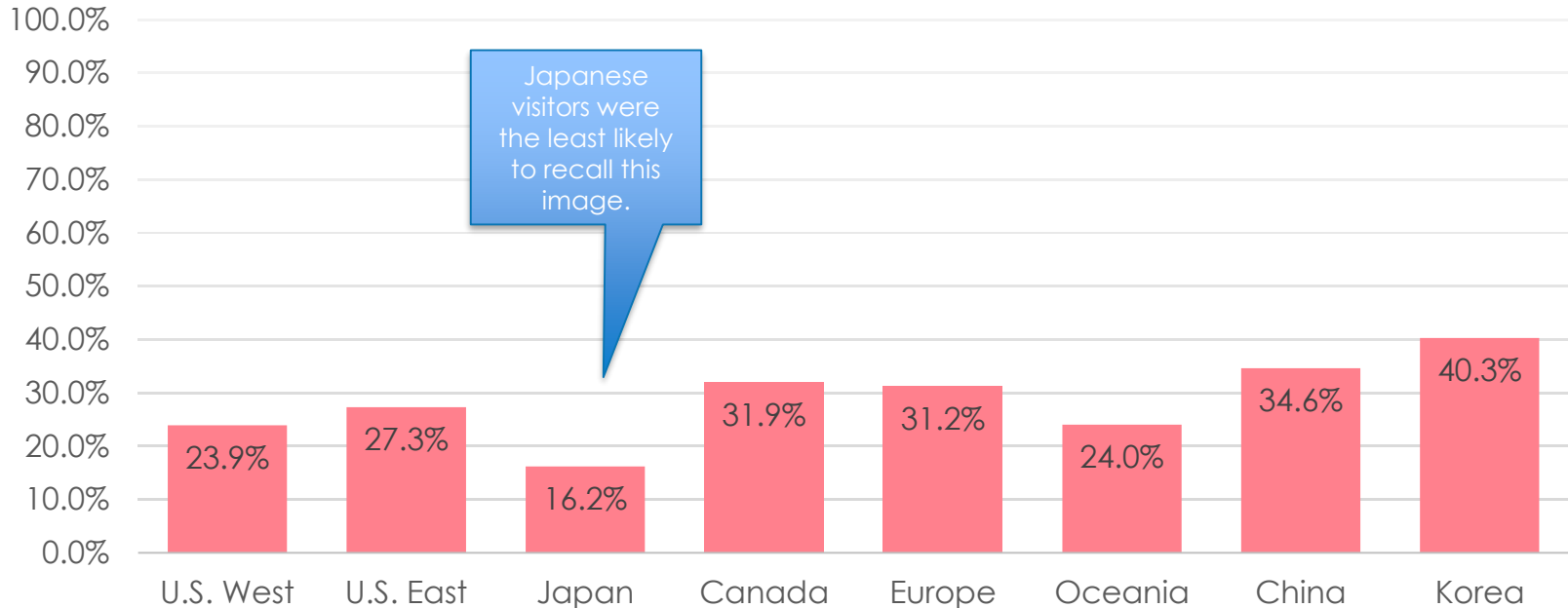


# ACTIVITIES – TRANSPORTATION

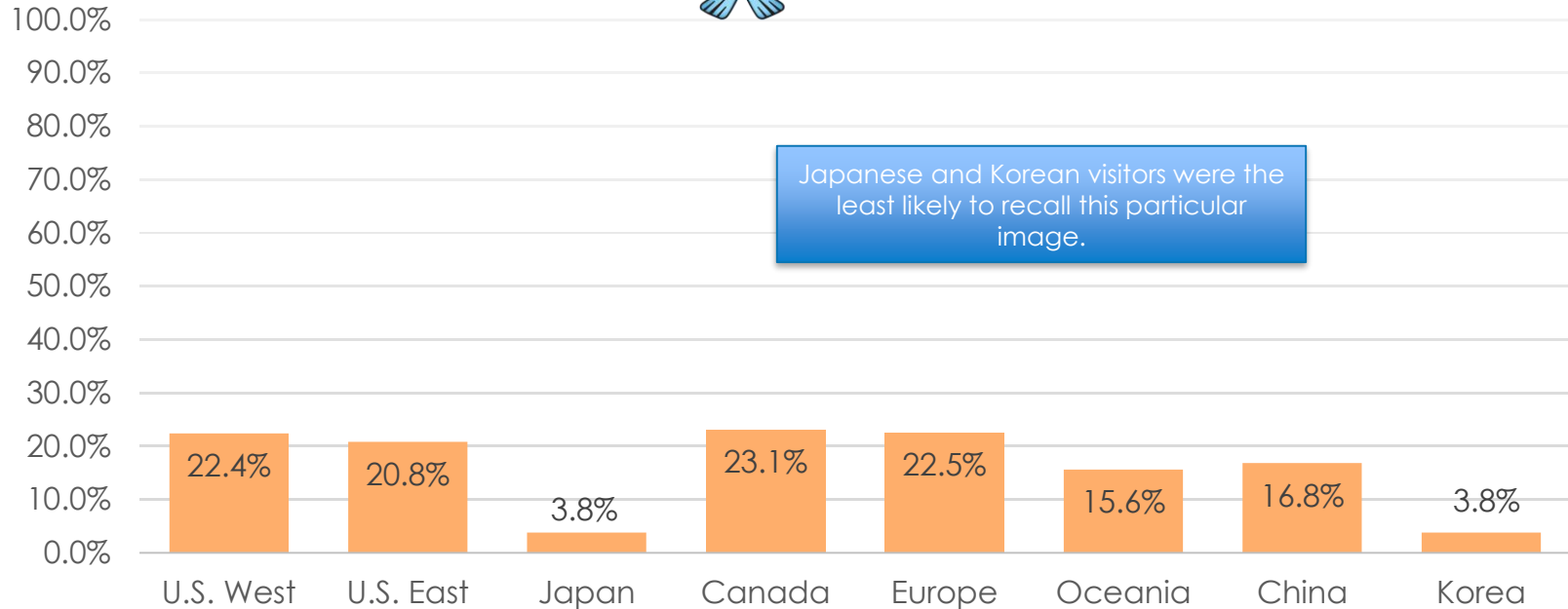
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>TOTAL</b>	90.1%	91.5%	96.3%	94.6%	93.9%	95.5%	91.5%	92.5%
<b>Airport shuttle</b>	15.7%	18.6%	23.4%	21.1%	20.8%	50.4%	9.9%	13.9%
<b>Trolley</b>	2.6%	3.8%	41.8%	5.7%	5.6%	22.3%	3.4%	20.9%
<b>Public bus</b>	3.2%	5.2%	12.9%	10.3%	13.9%	31.1%	13.3%	11.7%
<b>Tour bus/ tour van</b>	7.7%	20.1%	32.7%	11.7%	18.0%	39.1%	24.0%	30.8%
<b>Taxi/ limo</b>	5.3%	9.5%	27.3%	13.7%	21.5%	35.4%	19.3%	23.2%
<b>Rental car</b>	78.7%	72.3%	34.7%	76.9%	61.9%	29.8%	53.3%	57.3%
<b>Ride share</b>	13.8%	19.0%	5.4%	13.7%	18.6%	20.1%	15.5%	12.6%
<b>Bicycle rental</b>	2.7%	2.2%	2.5%	2.7%	3.8%	1.7%	3.4%	0.8%

# SECTION – SIGNAGE

# HVCB POST-ARRIVAL EXPERIENCE LOGO



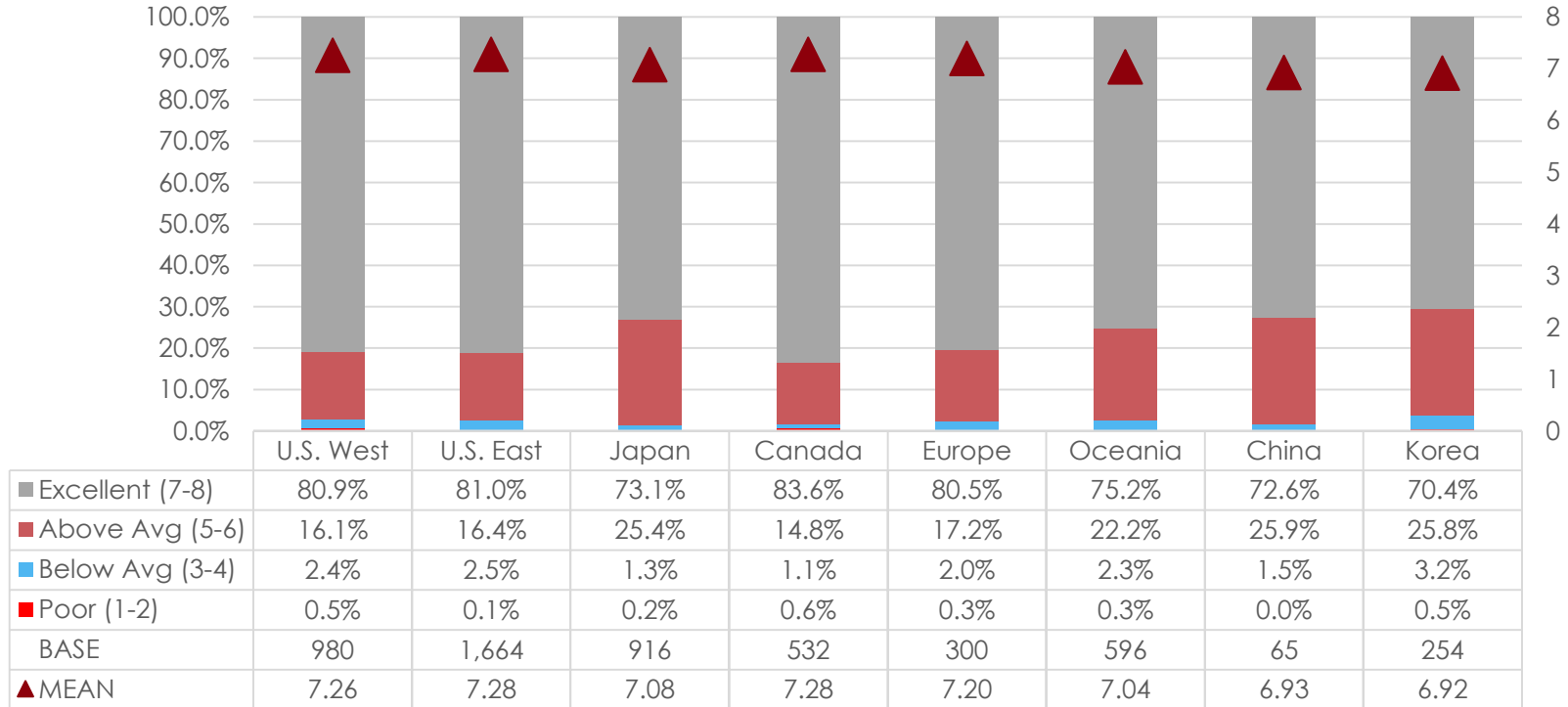
# OCEAN SAFETY LOGO



# SECTION – O'AHU

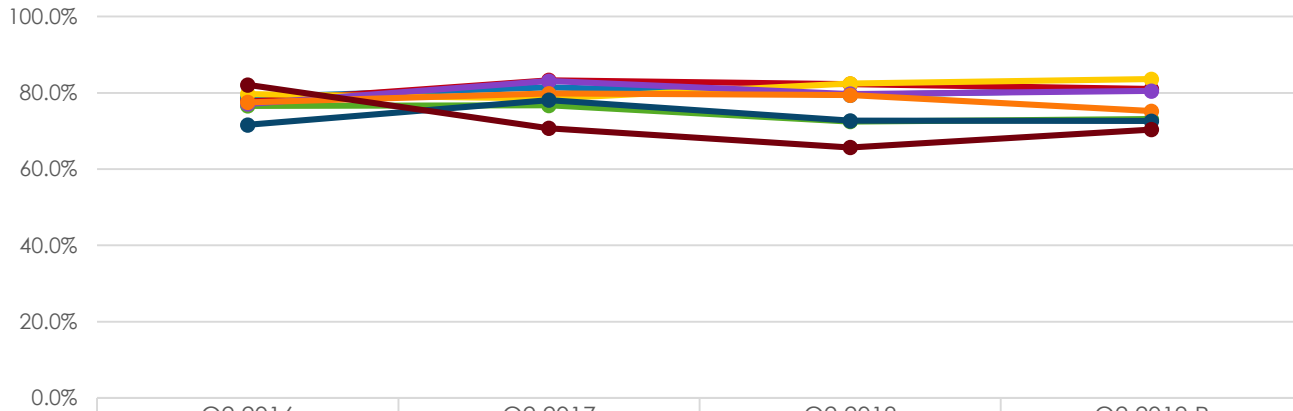
# SATISFACTION – O‘AHU

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



# SATISFACTION – O‘AHU

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

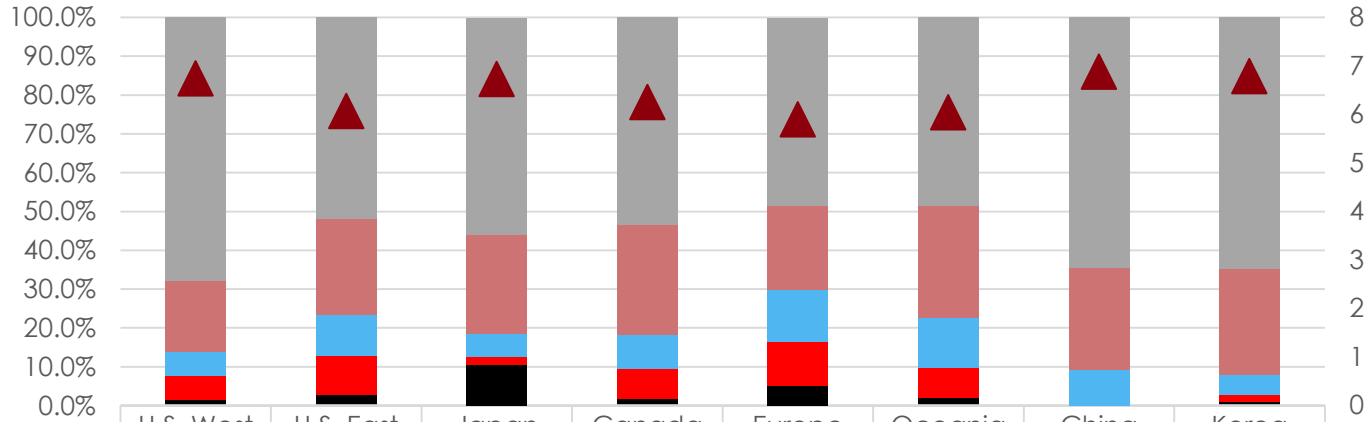


	Q2 2016	Q2 2017	Q2 2018	Q2 2019 P
U.S. West	78.8%	81.4%	79.4%	80.9%
U.S. East	77.7%	83.3%	82.3%	81.0%
Japan	76.6%	76.7%	72.5%	73.1%
Canada	79.7%	78.5%	82.4%	83.6%
Europe	77.1%	83.1%	79.7%	80.5%
Oceania	77.5%	79.8%	79.4%	75.2%
China	71.6%	78.1%	72.7%	72.6%
Korea	82.1%	70.7%	65.7%	70.4%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – O‘AHU

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

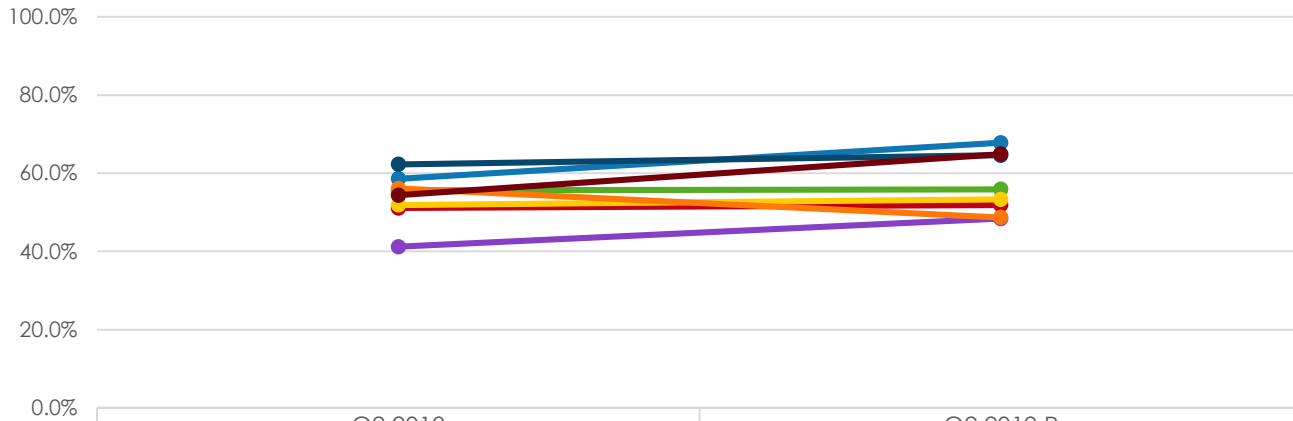


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	67.8%	51.9%	55.9%	53.3%	48.4%	48.7%	64.6%	64.9%
■ Somewhat likely (5-6)	18.3%	24.7%	25.6%	28.4%	21.7%	29.0%	26.2%	27.3%
■ Somewhat unlikely (3-4)	6.4%	10.5%	5.8%	8.9%	13.3%	12.7%	9.2%	5.1%
■ Very unlikely (1-2)	6.1%	10.1%	2.1%	7.5%	11.5%	7.8%	0.0%	1.6%
■ Not sure	1.4%	2.8%	10.5%	1.9%	5.0%	2.0%	0.0%	1.1%
BASE	855	1,216	882	426	190	512	51	198
▲ MEAN	6.74	6.07	6.73	6.25	5.90	6.04	6.88	6.79



# LIKELIHOOD OF RETURN VISIT – O‘AHU

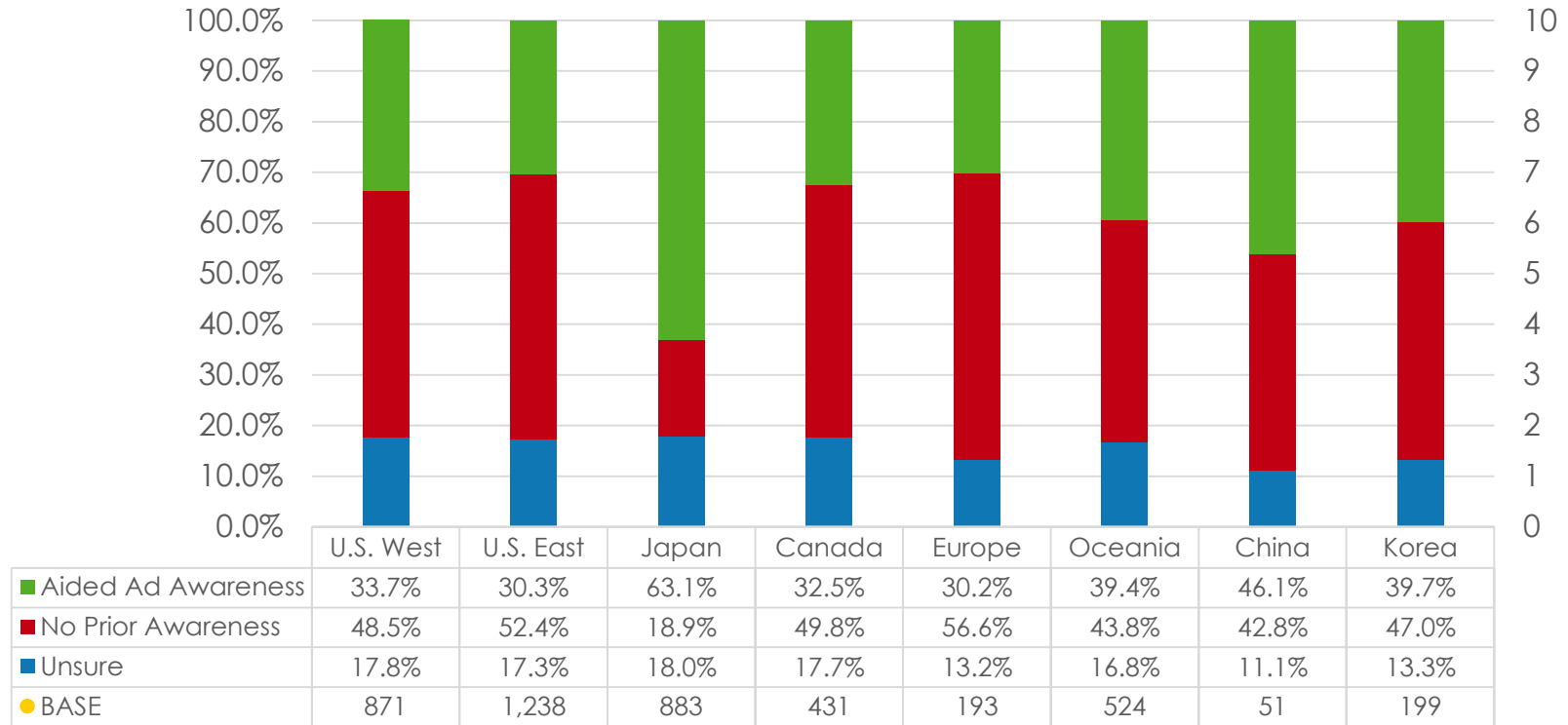
TOP BOX – VERY LIKELY (7-8)



	Q2 2018	Q2 2019 P
U.S. West	58.6%	67.8%
U.S. East	51.1%	51.9%
Japan	55.6%	55.9%
Canada	51.9%	53.3%
Europe	41.2%	48.4%
Oceania	56.1%	48.7%
China	62.3%	64.6%
Korea	54.4%	64.9%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – O‘AHU



# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Atlantis Submarine &amp; Cruises</b>	2.8%	3.5%	10.7%	2.3%	3.0%	5.2%	25.1%	6.9%
<b>Bernice P. Bishop Museum</b>	3.3%	2.8%	2.5%	2.2%	2.2%	1.4%	1.5%	0.4%
<b>Byodo In Temple</b>	6.6%	7.1%	0.8%	8.9%	7.4%	5.6%	7.9%	0.4%
<b>Chinatown &amp; Honolulu Art District</b>	9.6%	9.8%	20.4%	13.5%	14.5%	7.5%	38.2%	9.5%
<b>Diamond Head State Monument</b>	22.9%	30.5%	22.5%	41.5%	26.1%	30.1%	14.6%	31.0%
<b>Dole Plantation</b>	30.2%	30.0%	14.4%	29.7%	20.2%	23.0%	32.4%	30.5%
<b>Haleiwa</b>	22.6%	17.9%	26.0%	20.3%	15.3%	10.2%	13.7%	15.8%
<b>Hanauma Bay Nature Reserve</b>	17.8%	17.4%	19.1%	28.4%	15.6%	14.2%	46.9%	27.1%
<b>Harold L. Lyon Arboretum</b>	0.7%	0.9%	0.8%	0.6%	0.7%	0.2%	0.0%	3.5%
<b>Hawaii State Art Museum or Honolulu Museum of Art</b>	2.1%	1.8%	3.0%	2.8%	2.0%	1.9%	7.0%	0.4%
<b>Hawaiian Mission Houses, Historic Site and Archive</b>	1.4%	1.2%	0.2%	1.5%	1.3%	1.8%	0.0%	2.0%
<b>Hawaii s Plantation Village</b>	1.6%	1.3%	2.1%	1.7%	3.3%	1.8%	2.9%	2.6%
<b>Honolulu Zoo</b>	5.2%	6.2%	6.1%	7.7%	7.3%	6.4%	5.5%	8.5%

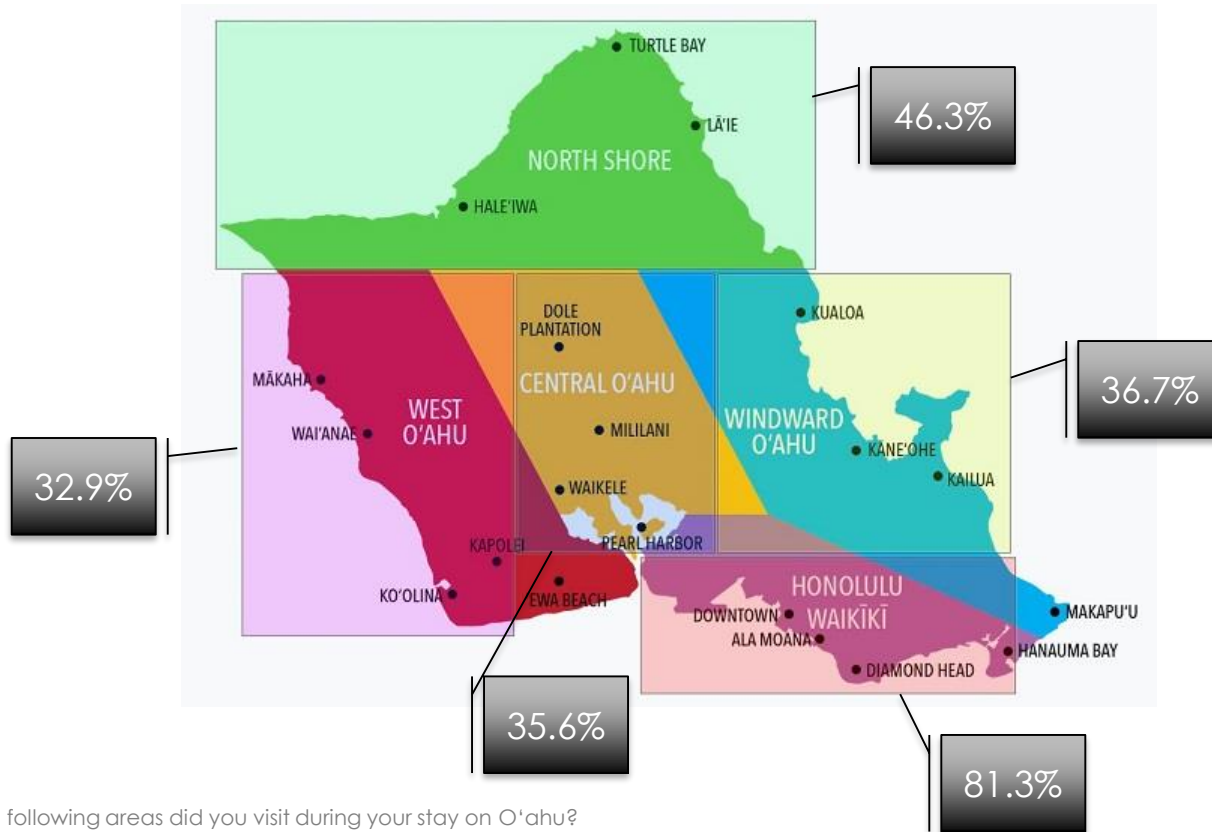
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Ho‘omaluhia Botanical Garden</b>	4.3%	3.5%	1.6%	6.2%	4.3%	1.5%	3.5%	3.8%
<b>Iolani Palace State Monument</b>	4.0%	7.3%	13.4%	8.8%	13.0%	6.4%	13.1%	12.8%
<b>Kaiwi State Scenic Shoreline/ Makapuu Trail</b>	3.8%	6.1%	5.6%	7.5%	6.0%	1.7%	7.3%	1.6%
<b>Kakaako Street Art</b>	1.6%	1.7%	16.5%	1.7%	2.7%	0.7%	9.9%	5.0%
<b>Koko Head Crater Trail</b>	5.8%	7.1%	4.7%	11.8%	7.8%	3.7%	7.0%	5.8%
<b>Kualoa Private Nature Reserve</b>	8.8%	9.2%	7.6%	14.2%	11.4%	8.4%	24.8%	9.3%
<b>Lanikai or Kailua Beach</b>	26.9%	22.6%	23.6%	29.8%	20.2%	11.7%	23.3%	20.4%
<b>Manoa Falls &amp; Trail</b>	11.4%	12.0%	3.4%	17.3%	12.3%	2.3%	2.9%	2.0%
<b>National Memorial Cemetery of the Pacific</b>	6.7%	13.2%	1.7%	7.3%	10.7%	10.7%	10.8%	1.5%
<b>Nuuanu Pali Lookout</b>	5.1%	6.9%	4.1%	9.8%	5.1%	4.4%	23.6%	5.4%
<b>North Shore Beaches</b>	46.0%	40.0%	16.5%	43.7%	30.3%	32.9%	21.0%	21.9%

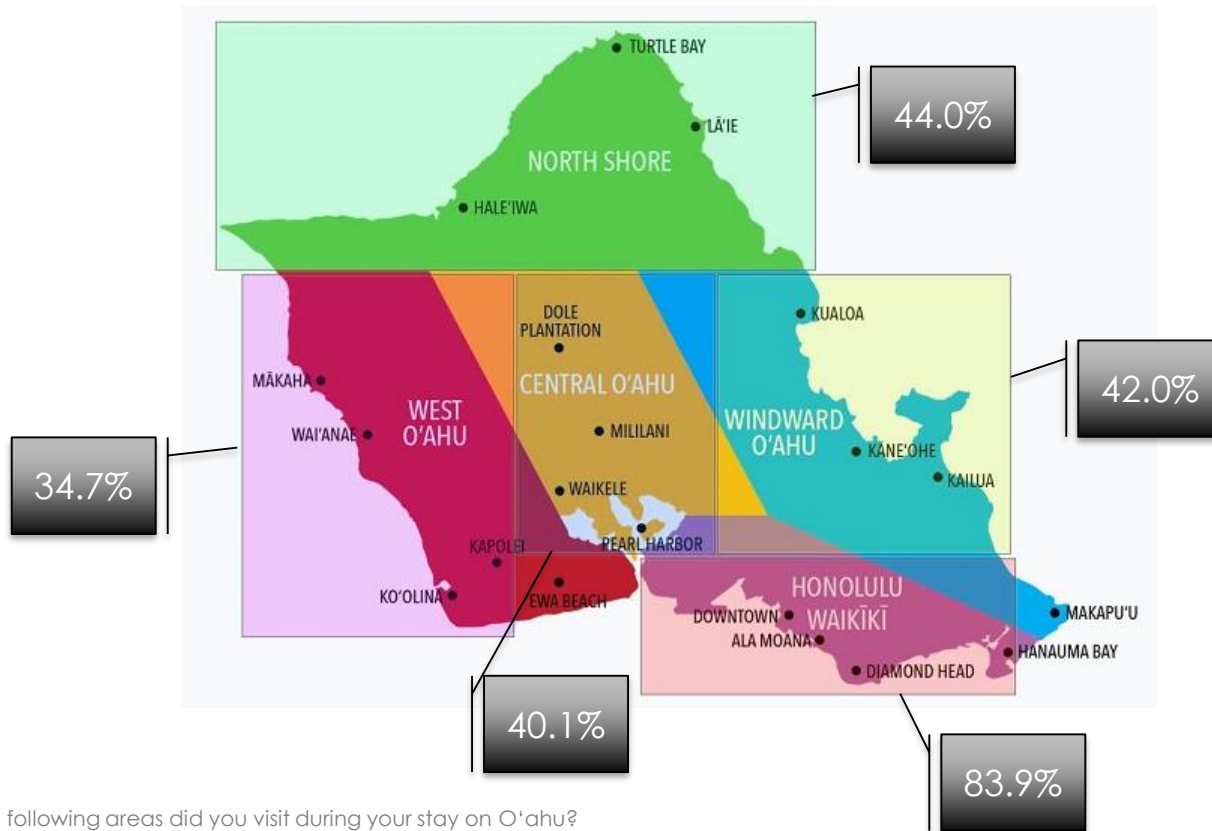
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Pearl Harbor</b>	26.8%	38.1%	11.2%	31.0%	38.2%	40.0%	46.1%	13.5%
<b>Polynesian Cultural Center</b>	16.1%	15.6%	3.4%	16.6%	7.6%	10.1%	16.0%	12.1%
<b>Queen Emma’s Summer Palace</b>	1.6%	2.2%	2.0%	1.3%	4.0%	2.6%	2.9%	1.5%
<b>Sea Life Park Hawaii</b>	3.8%	4.3%	4.0%	4.5%	3.1%	2.2%	0.0%	0.9%
<b>Waikiki Aquarium</b>	5.5%	5.0%	5.8%	5.8%	3.0%	3.7%	0.0%	3.0%
<b>Waimanalo Beach Park</b>	9.0%	10.4%	5.7%	16.9%	9.7%	6.3%	4.4%	7.5%
<b>Waimea Valley</b>	17.5%	16.2%	3.8%	16.9%	14.8%	10.5%	2.9%	3.9%

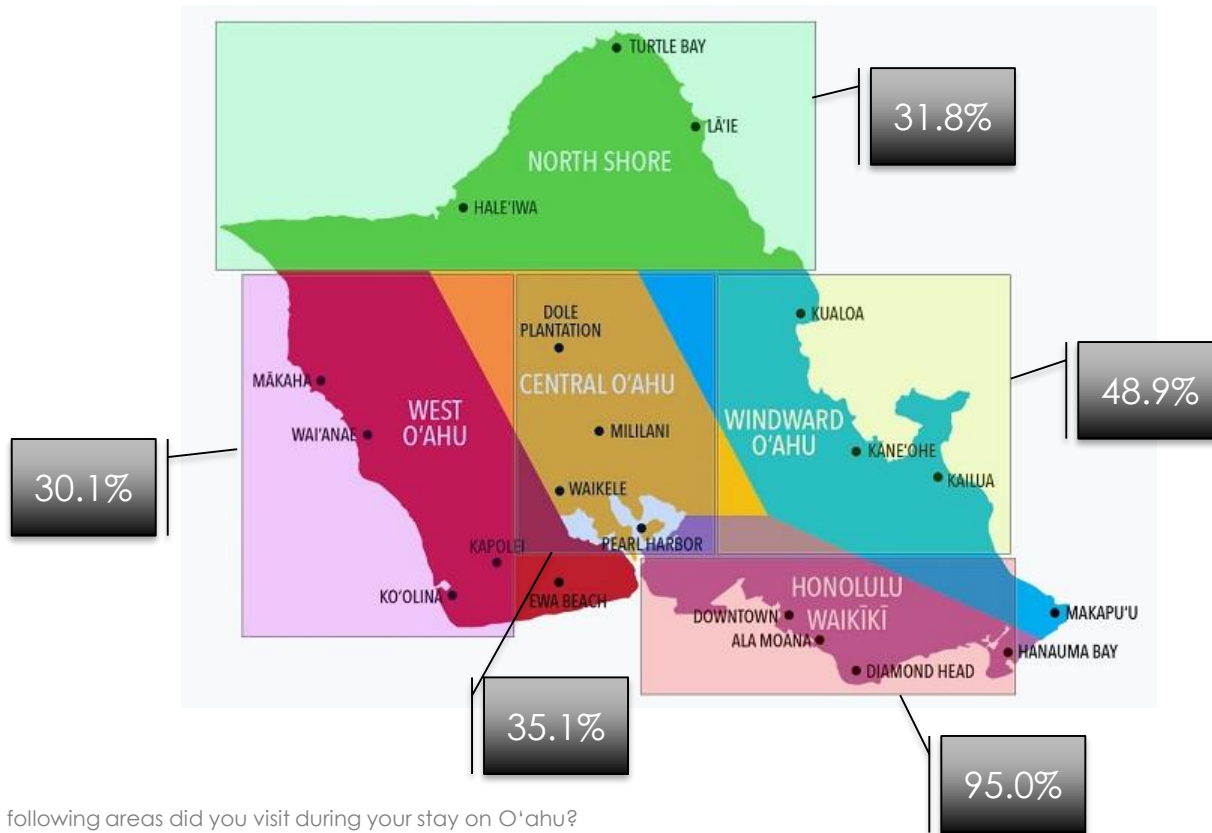
# AREAS VISITED U.S. WEST



# AREAS VISITED U.S. EAST

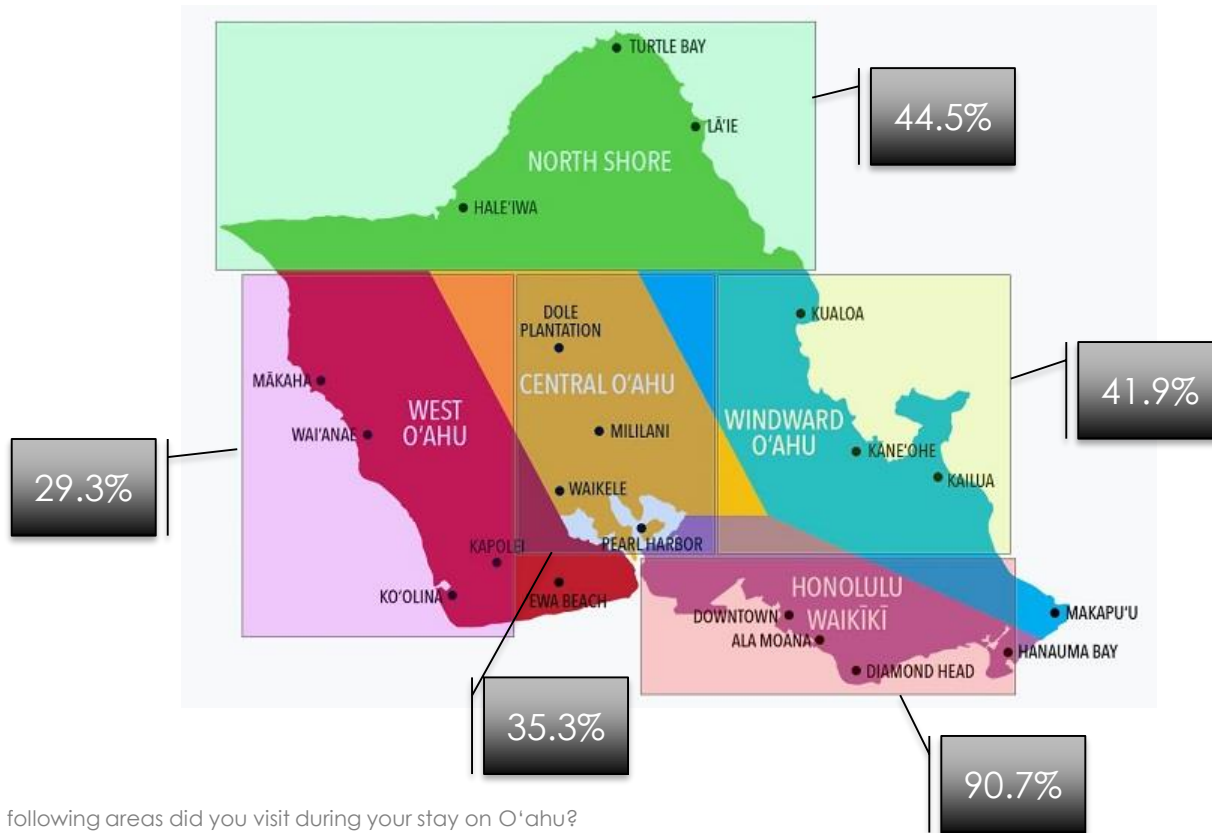


# AREAS VISITED JAPAN

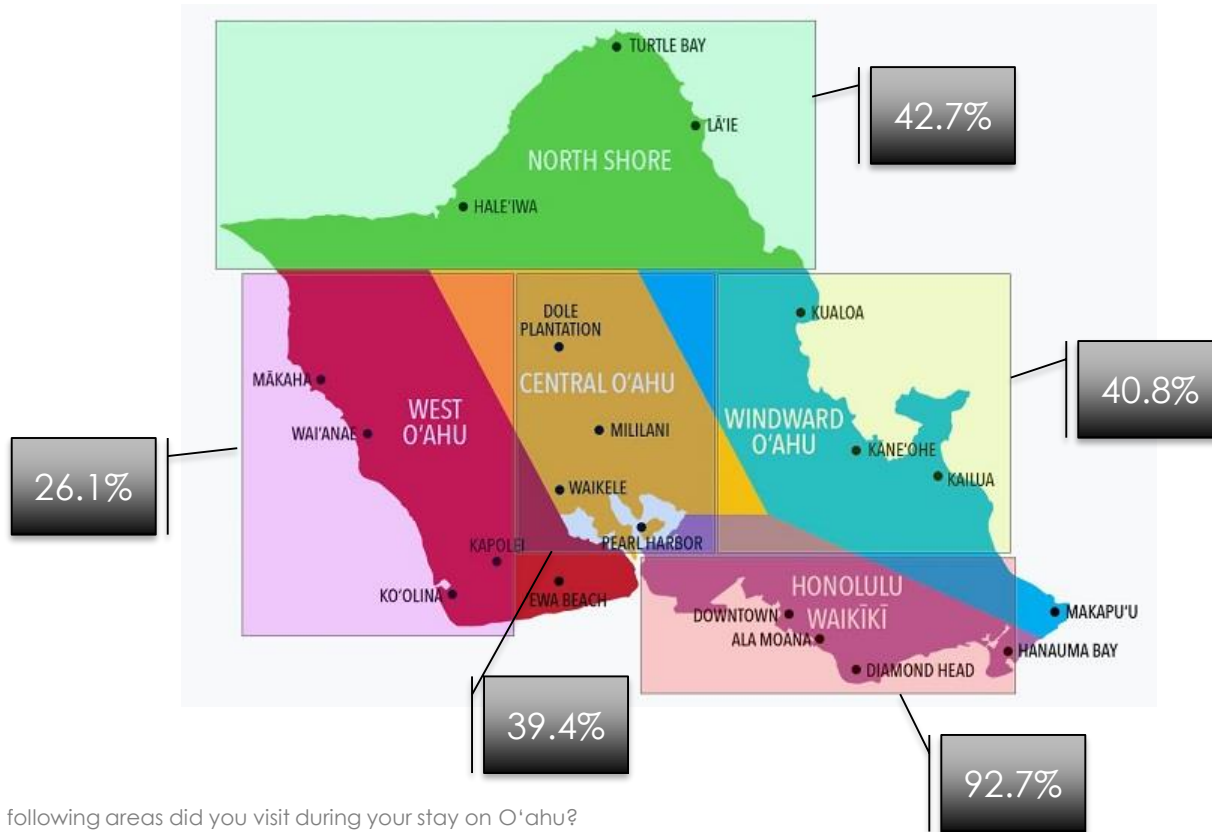




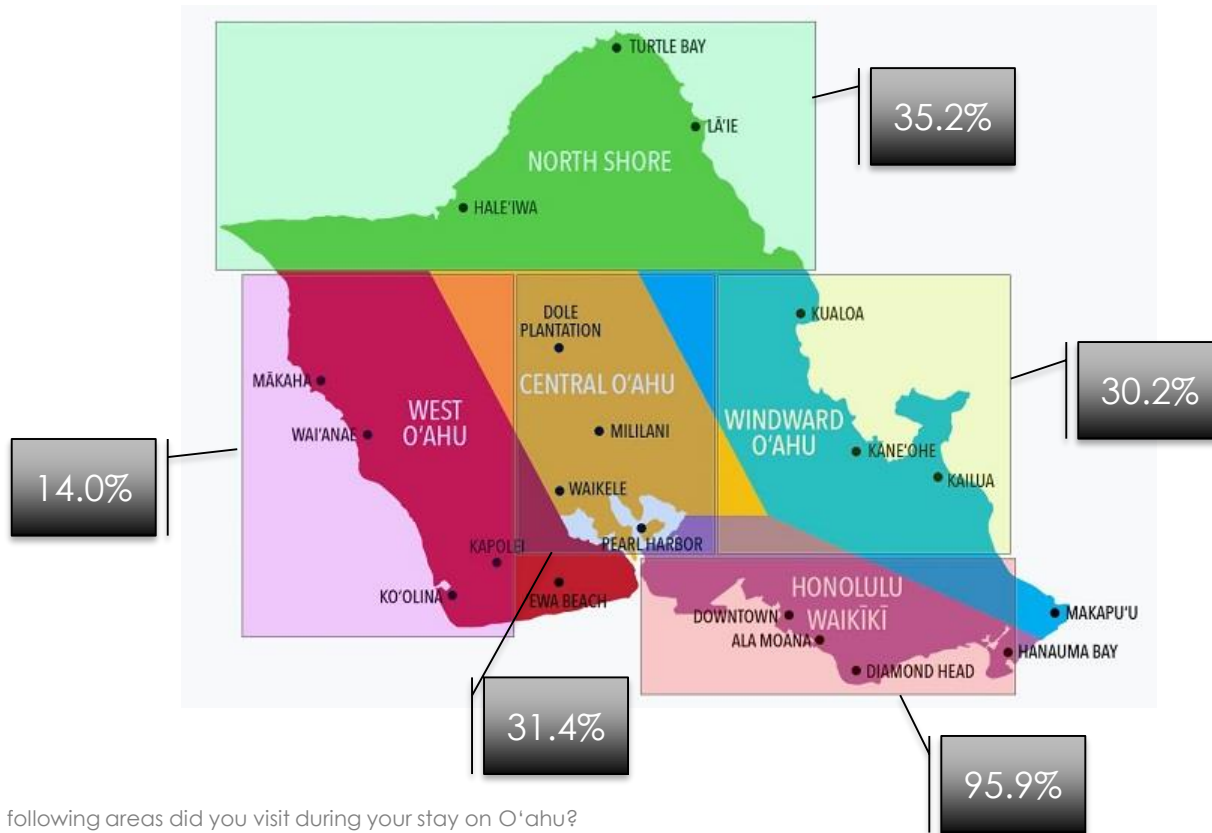
# AREAS VISITED CANADA



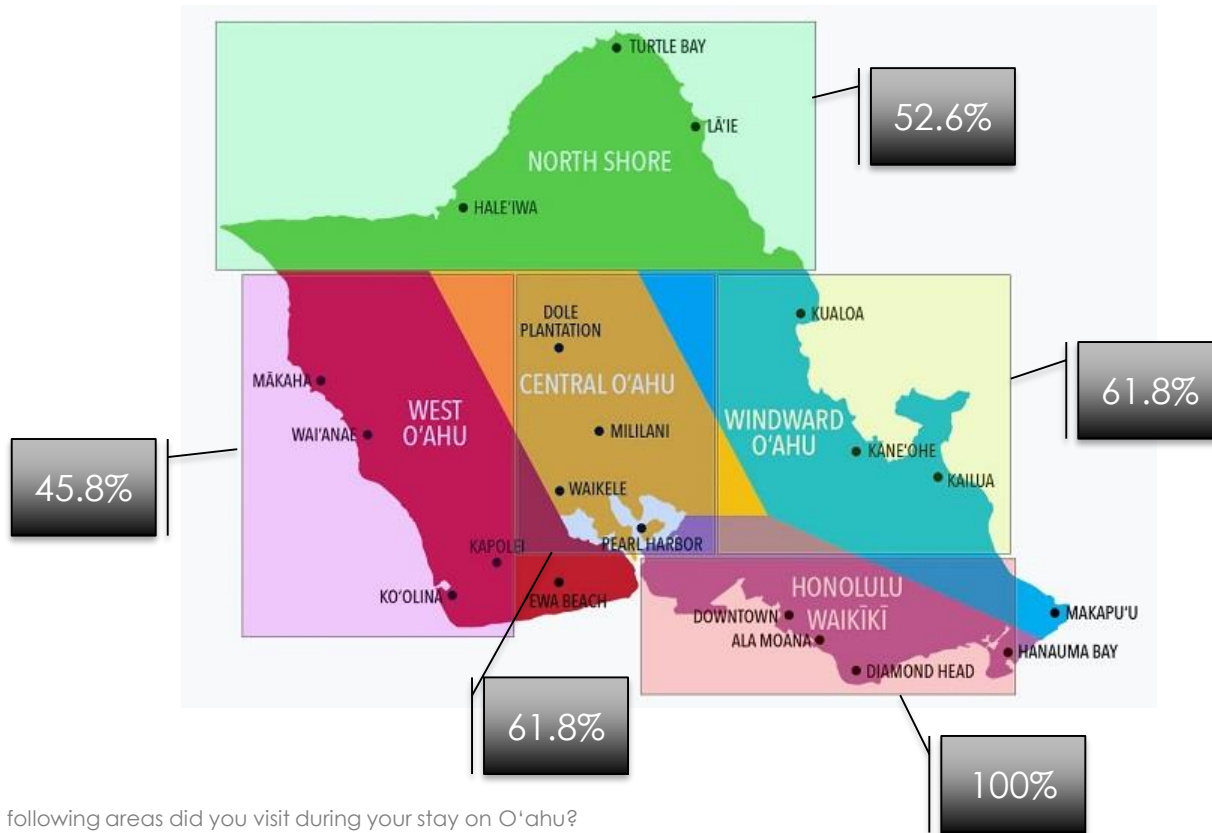
# AREAS VISITED EUROPE



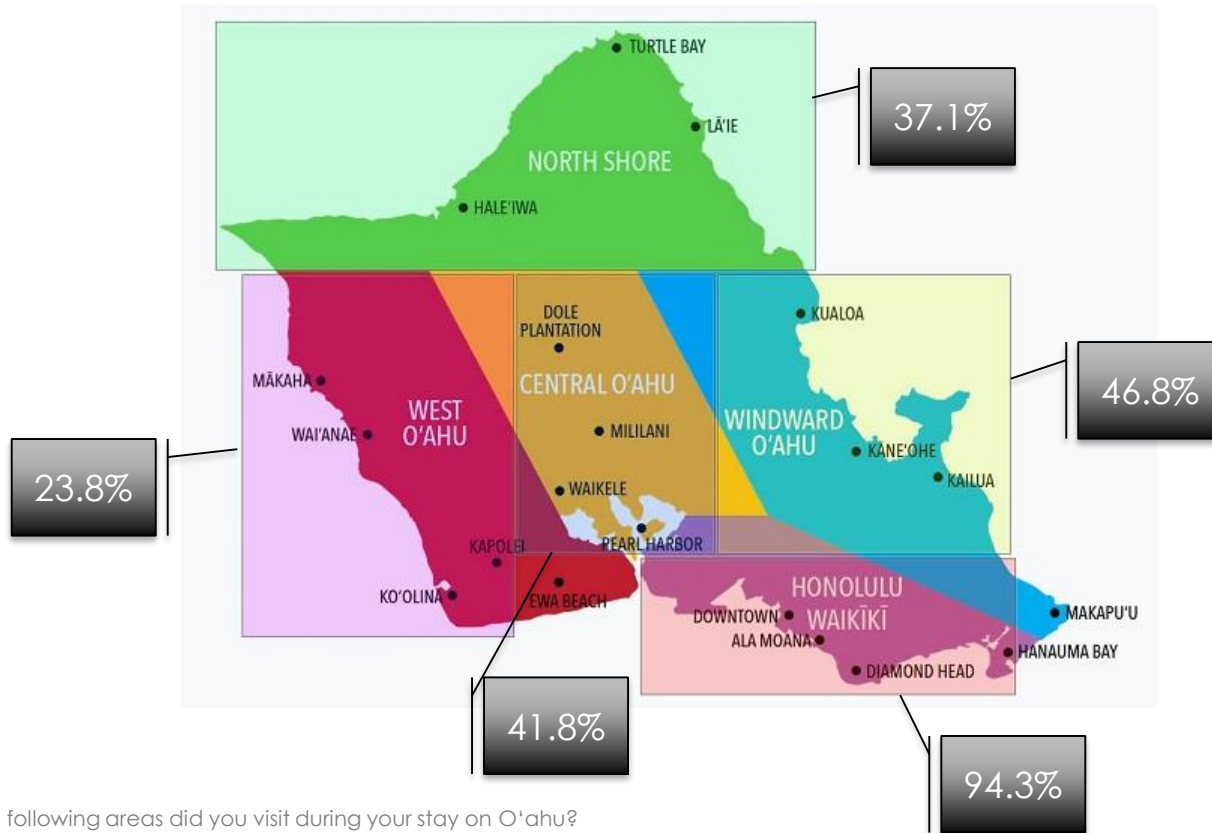
# AREAS VISITED OCEANIA



# AREAS VISITED CHINA

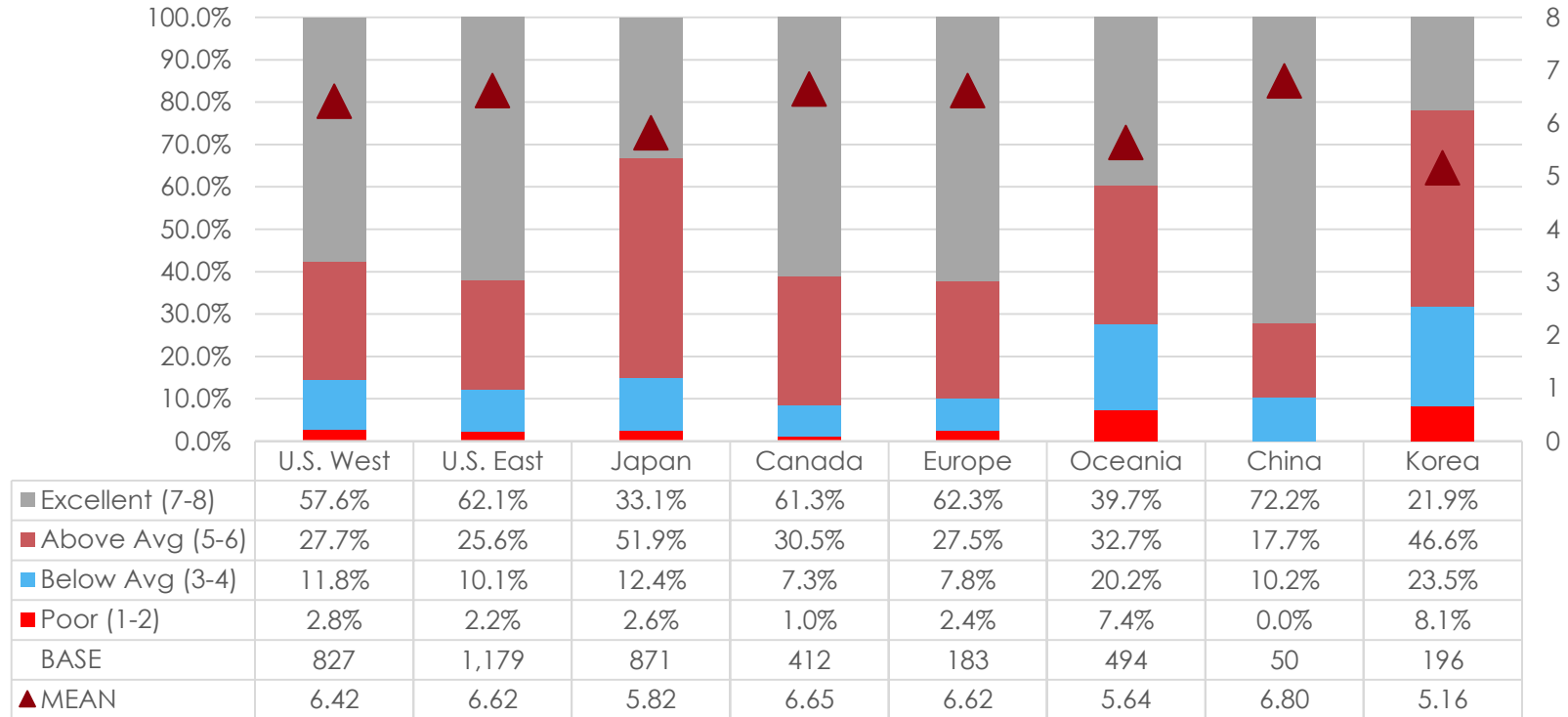


# AREAS VISITED KOREA



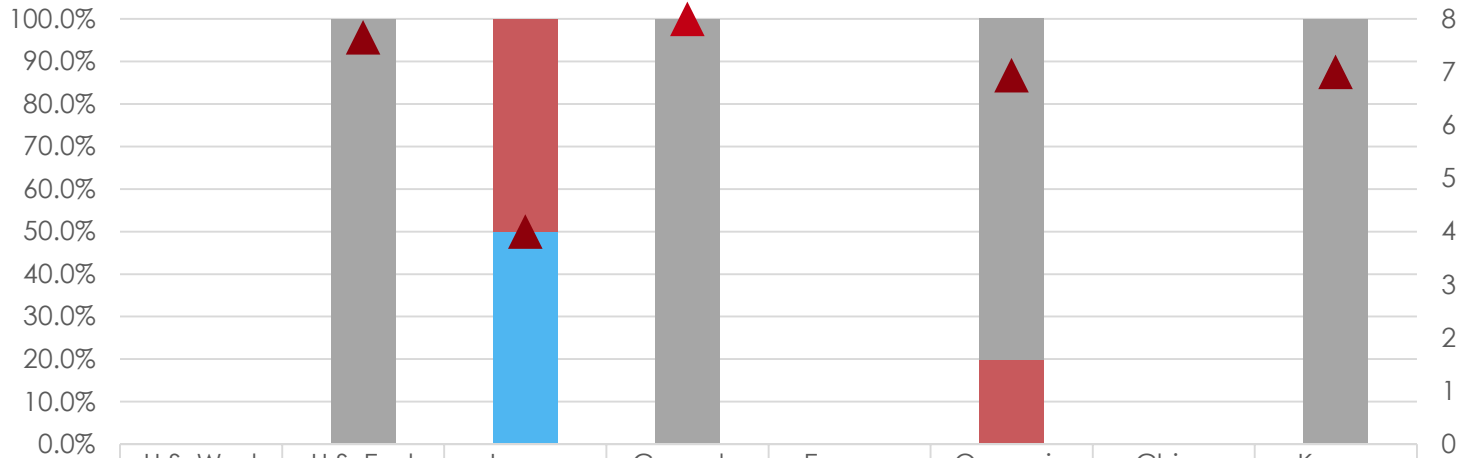
# SATISFACTION – Daniel K. Inouye International Airport

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



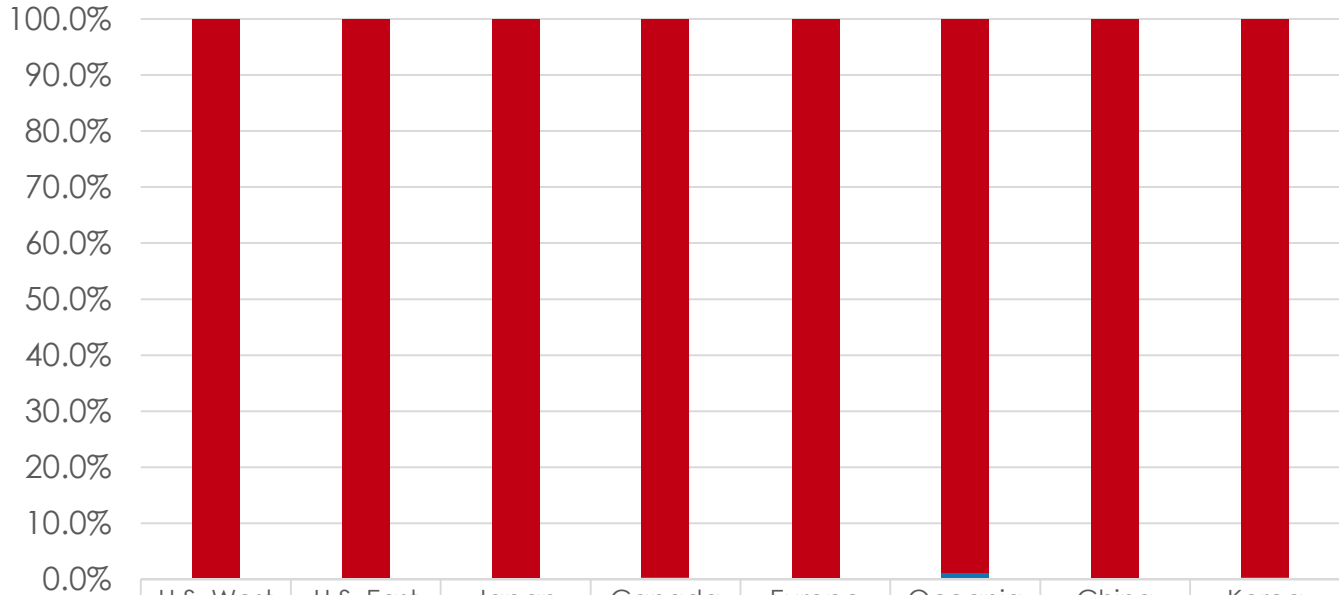
# SATISFACTION – Honolulu Harbor

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Excellent (7-8)	0.0%	100.0%	0.0%	100.0%	0.0%	80.2%	0.0%	100.0%
■ Above Avg (5-6)	0.0%	0.0%	50.0%	0.0%	0.0%	19.8%	0.0%	0.0%
■ Below Avg (3-4)	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%
■ Poor (1-2)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	0	3	2	2	0	6	0	1
▲ MEAN	0.00	7.65	4.00	8.00	0.00	6.94	0.00	7.00

# TRANSPAC TRAVEL OPTIONS – O‘AHU



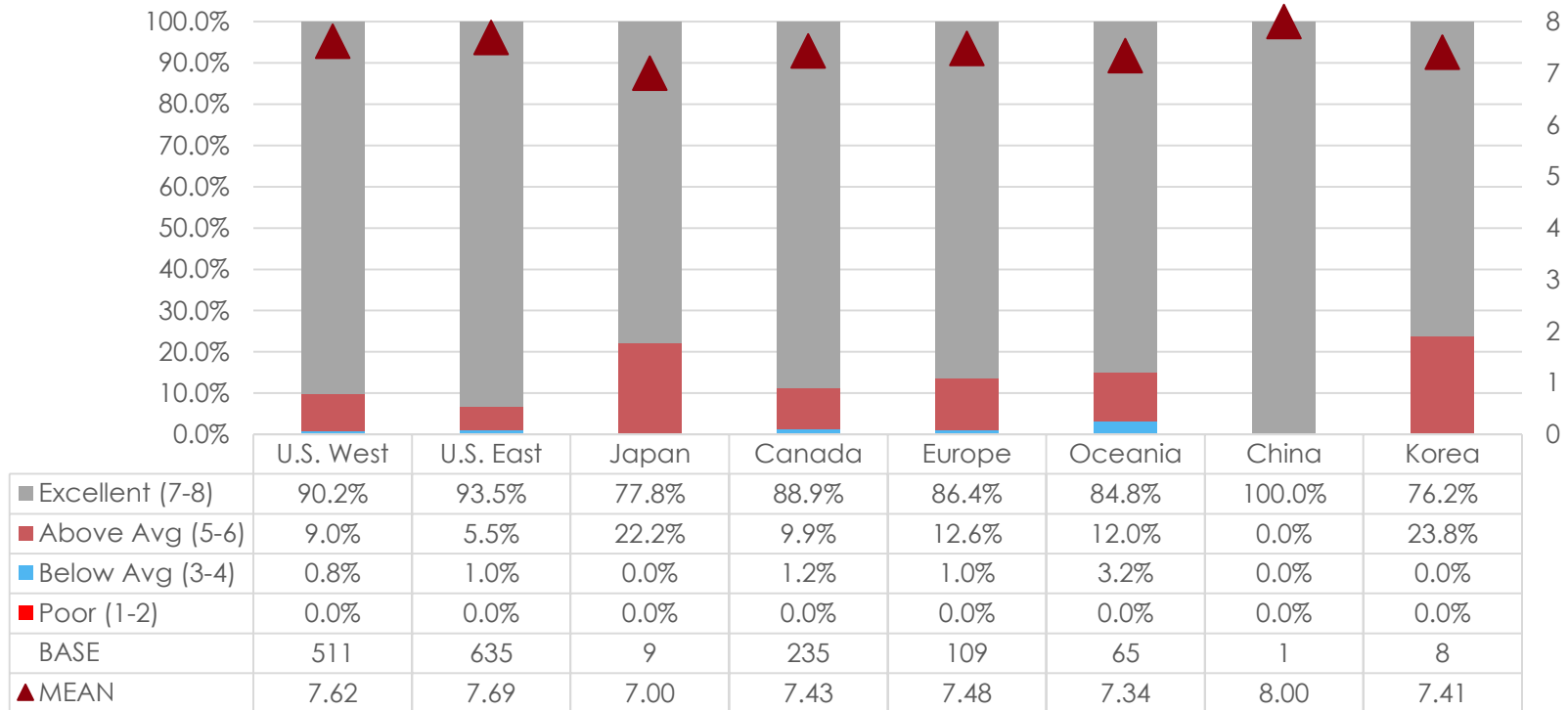
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Air/ Flight	100.0%	99.7%	99.8%	99.5%	100.0%	98.8%	100.0%	99.5%
Cruise Ship/ Ocean Vessel	0.0%	0.3%	0.2%	0.5%	0.0%	1.2%	0.0%	0.5%
BASE	828	1188	873	414	183	500	50	197



# SECTION – KAUA‘I

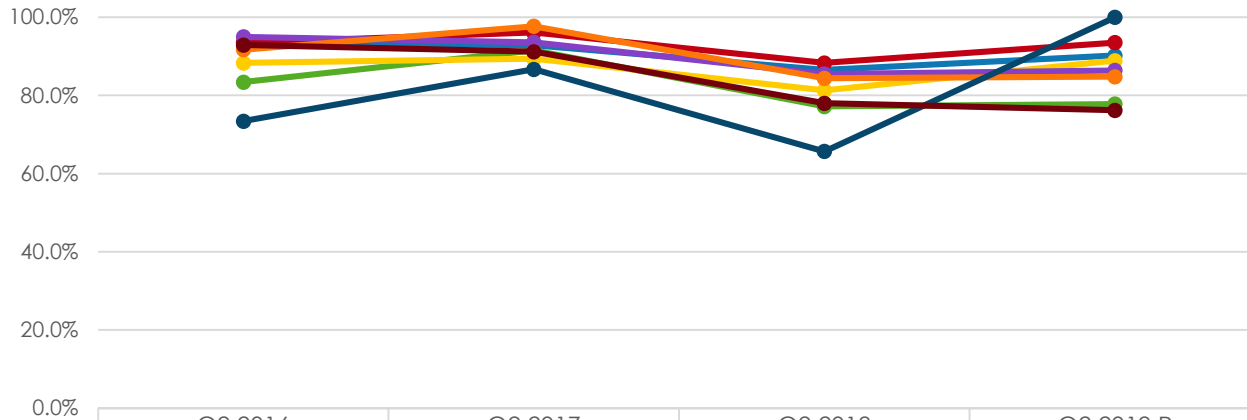
# SATISFACTION – KAUA‘I

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



# SATISFACTION – KAUA‘I

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

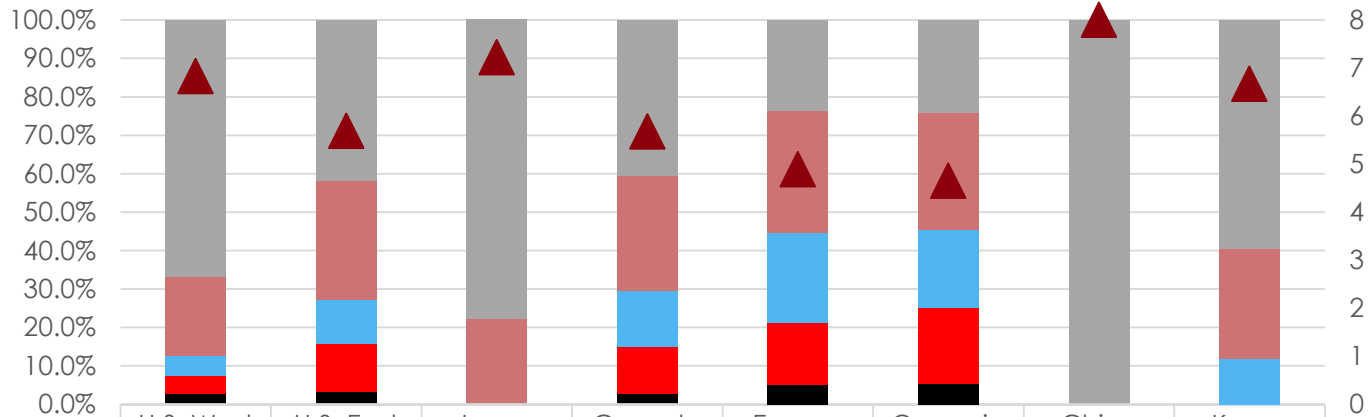


	Q2 2016	Q2 2017	Q2 2018	Q2 2019 P
U.S. West	93.6%	92.8%	86.5%	90.2%
U.S. East	93.5%	96.1%	88.3%	93.5%
Japan	83.4%	91.5%	77.2%	77.8%
Canada	88.3%	89.4%	81.3%	88.9%
Europe	95.0%	93.6%	85.5%	86.4%
Oceania	91.7%	97.7%	84.4%	84.8%
China	73.4%	86.7%	65.7%	100.0%
Korea	92.9%	91.2%	78.0%	76.2%

P= Preliminary Data

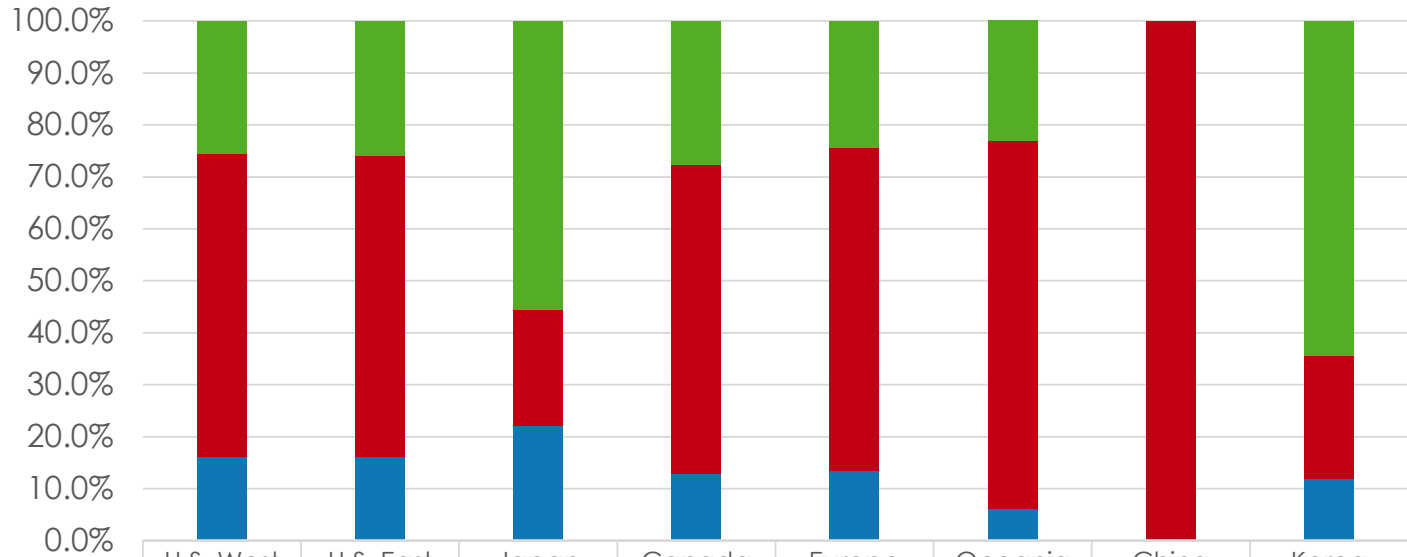
# LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	66.8%	41.9%	77.8%	40.4%	23.6%	23.9%	100.0%	59.5%
Somewhat likely (5-6)	20.5%	30.9%	22.2%	30.1%	31.6%	30.6%	0.0%	28.6%
Somewhat unlikely (3-4)	5.3%	11.7%	0.0%	14.5%	23.6%	20.1%	0.0%	11.9%
Very unlikely (1-2)	4.5%	12.4%	0.0%	12.2%	16.0%	20.1%	0.0%	0.0%
Not sure	2.9%	3.2%	0.0%	2.8%	5.1%	5.2%	0.0%	0.0%
BASE	487	571	9	223	102	55	1	8
MEAN	6.83	5.69	7.22	5.68	4.89	4.65	8.00	6.67

# AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	25.5%	25.9%	55.6%	27.7%	24.3%	23.2%	0.0%	64.3%
No Prior Awareness	58.5%	58.0%	22.2%	59.5%	62.2%	70.8%	100.0%	23.8%
Unsure	16.0%	16.1%	22.2%	12.8%	13.5%	6.1%	0.0%	11.9%
BASE	495	578	9	227	104	55	1	8

# ATTRACTIONS – KAUA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Fern Grotto</b>	11.0%	12.1%	33.3%	10.6%	8.4%	16.4%	0.0%	11.9%
<b>Hanalei Town</b>	53.1%	39.3%	33.3%	47.8%	51.0%	34.8%	0.0%	11.9%
<b>Hanalei Beach</b>	47.7%	37.1%	33.3%	48.1%	50.6%	27.8%	100.0%	11.9%
<b>Kalalau Trail</b>	6.6%	7.7%	0.0%	14.0%	16.9%	4.4%	0.0%	11.9%
<b>Kalapaki Beach</b>	24.5%	22.9%	22.2%	28.0%	22.8%	10.8%	100.0%	0.0%
<b>Bike Path in Kapaa</b>	11.7%	6.7%	0.0%	9.6%	5.4%	4.4%	0.0%	11.9%
<b>Kaua'i Museum</b>	5.1%	2.2%	11.1%	1.6%	3.3%	0.0%	100.0%	0.0%
<b>Ke e Beach</b>	7.0%	3.8%	0.0%	6.8%	7.1%	1.9%	0.0%	0.0%
<b>Kilauea Lighthouse</b>	34.2%	29.4%	11.1%	29.0%	33.0%	21.5%	100.0%	11.9%
<b>Koke e</b>	8.0%	8.9%	0.0%	14.1%	22.8%	2.6%	0.0%	0.0%

## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Koke e Museum</b>	3.7%	2.9%	0.0%	4.3%	7.3%	1.3%	0.0%	0.0%
<b>Na Aina Kai Gardens</b>	2.4%	1.3%	0.0%	0.5%	1.0%	0.0%	0.0%	0.0%
<b>Napali Coast</b>	42.4%	50.5%	11.1%	46.2%	50.4%	34.8%	100.0%	28.6%
<b>Allerton Garden</b>	10.0%	8.5%	11.1%	7.2%	15.1%	2.6%	100.0%	0.0%
<b>Limahuli Garden</b>	2.3%	3.1%	0.0%	2.9%	5.7%	1.3%	0.0%	0.0%
<b>Old Koloa Town</b>	41.4%	25.9%	0.0%	30.6%	30.5%	20.9%	100.0%	0.0%
<b>Opaeka'a Falls</b>	28.3%	27.9%	22.2%	33.2%	37.2%	20.8%	0.0%	0.0%
<b>Po ipu Beach</b>	63.8%	43.3%	44.4%	54.8%	50.8%	27.2%	0.0%	40.5%
<b>Smith's Tropical Paradise Gardens</b>	11.3%	9.4%	0.0%	4.3%	7.1%	1.9%	0.0%	0.0%
<b>Spouting Horn</b>	40.7%	34.6%	0.0%	41.9%	36.0%	20.2%	0.0%	11.9%
<b>Wailua Falls</b>	41.6%	39.5%	33.3%	47.5%	55.0%	24.7%	0.0%	35.7%

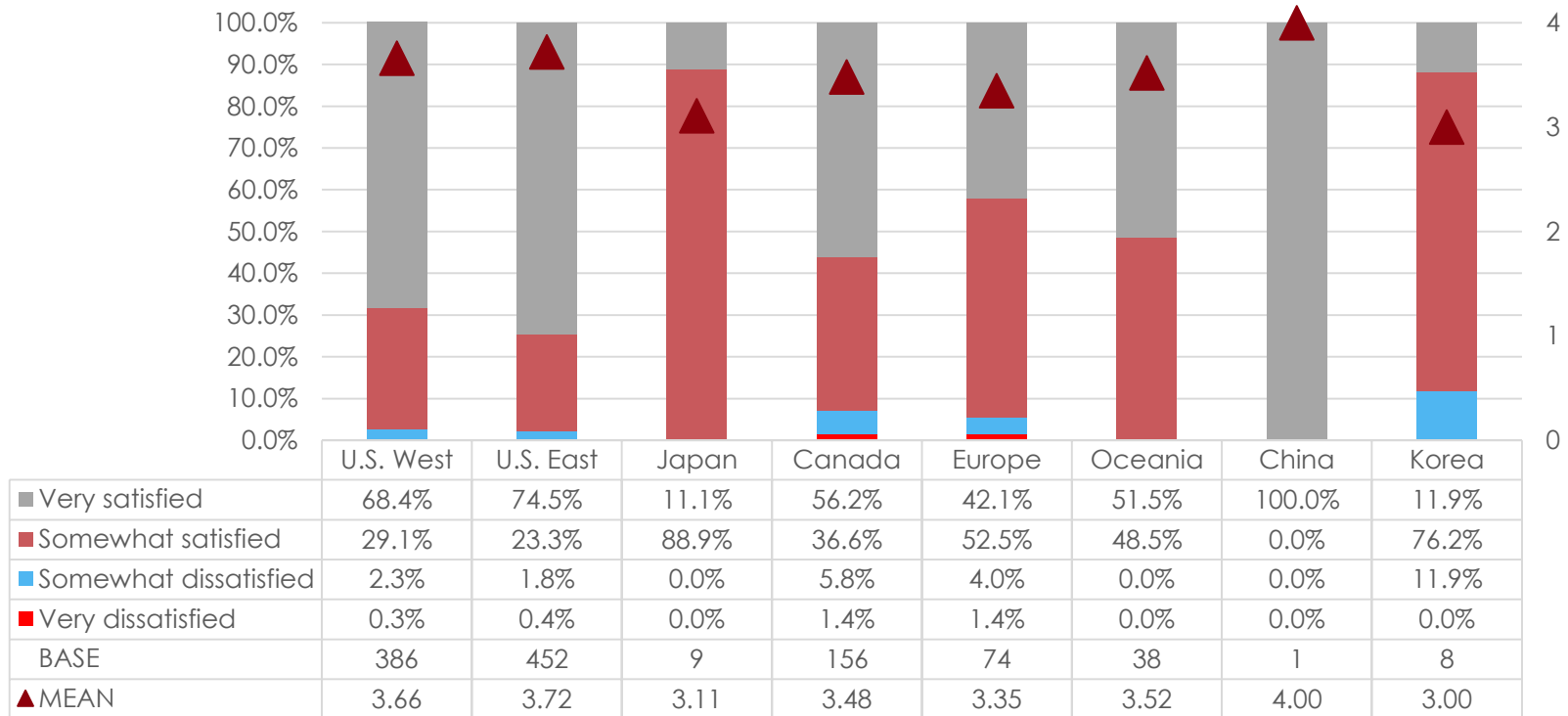
## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Wailua River</b>	29.3%	23.1%	22.2%	26.1%	29.3%	21.5%	0.0%	0.0%
<b>Waimea Canyon</b>	50.8%	56.0%	66.7%	62.7%	67.8%	43.7%	100.0%	52.4%
<b>Disc Golf</b>	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Mini Golf</b>	2.5%	1.7%	0.0%	4.6%	0.8%	1.9%	0.0%	0.0%



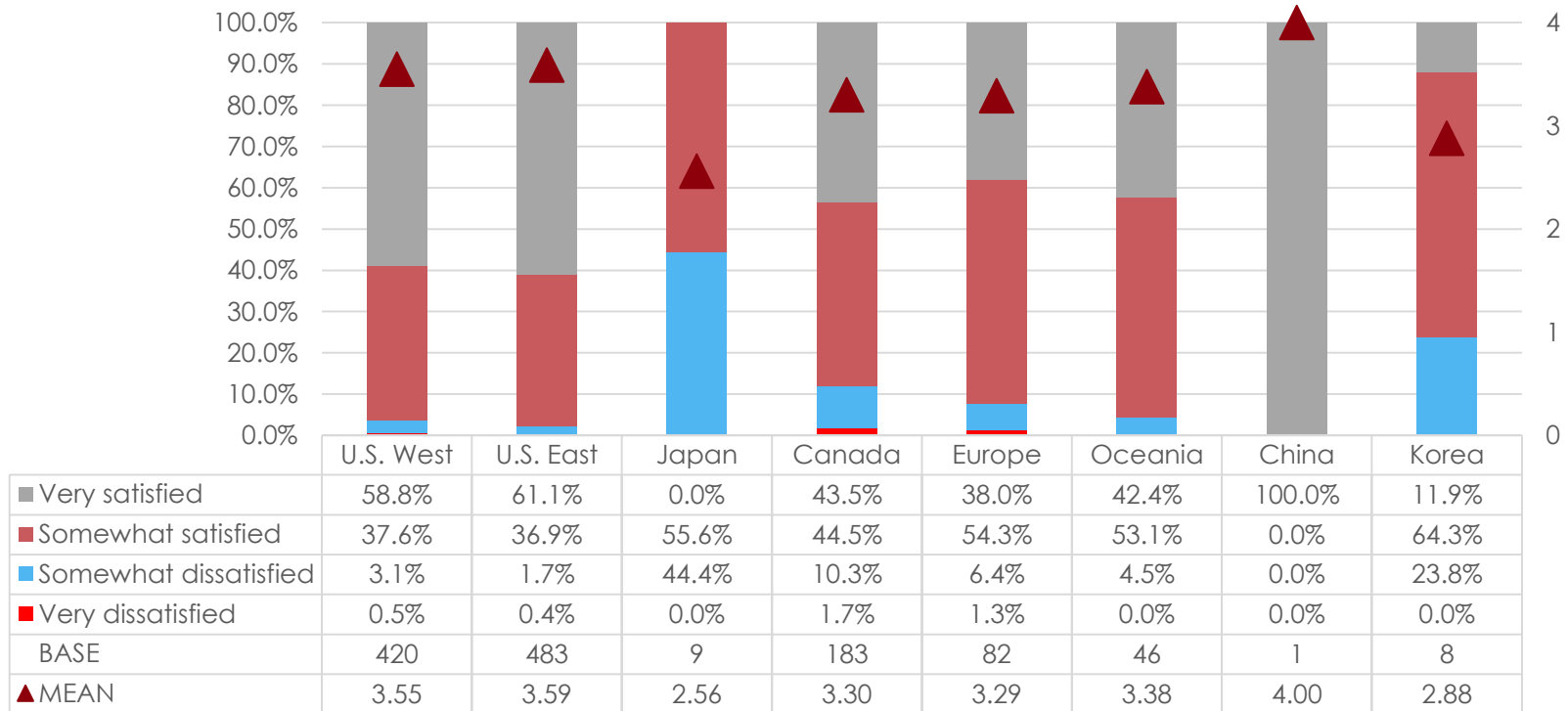
# SATISFACTION – ENTERTAINMENT

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



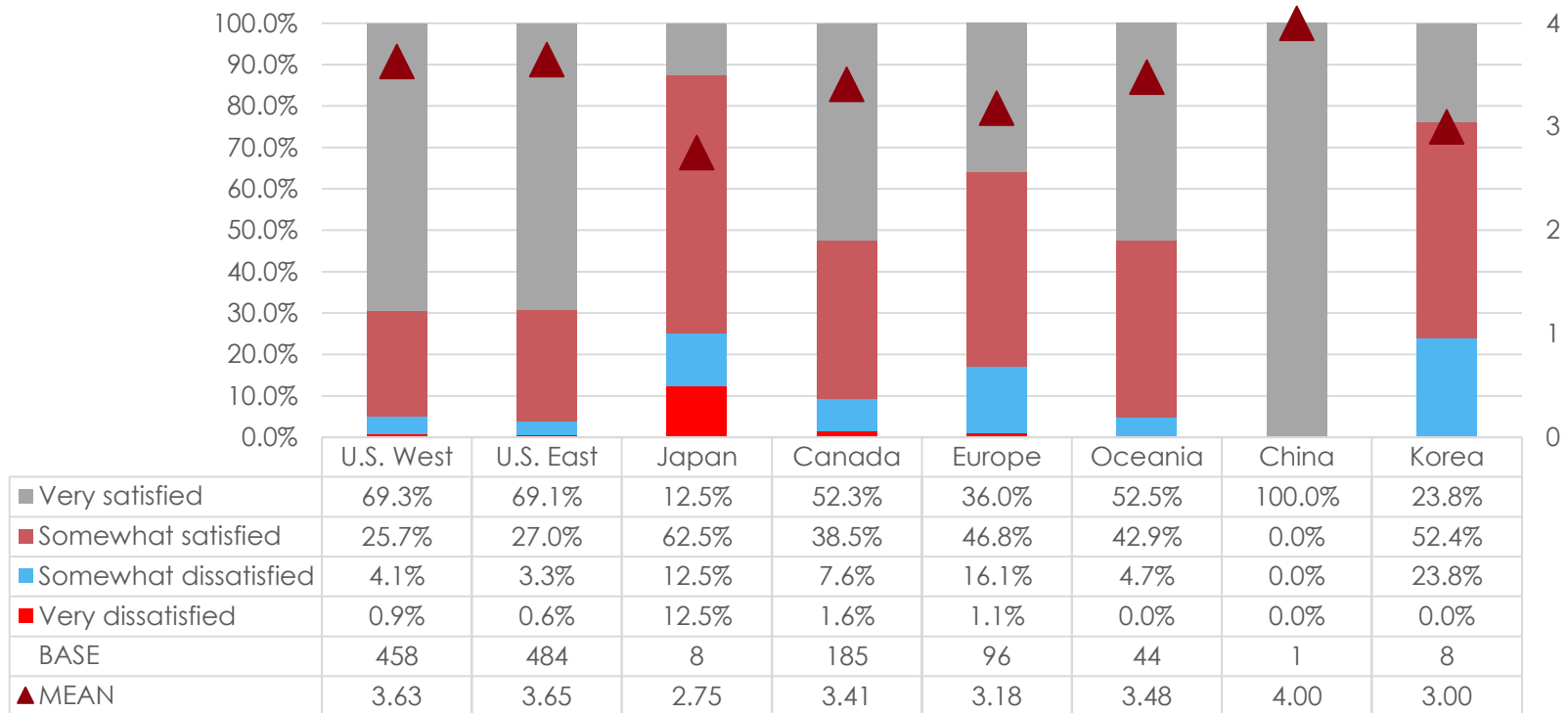
# SATISFACTION – SHOPPING

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



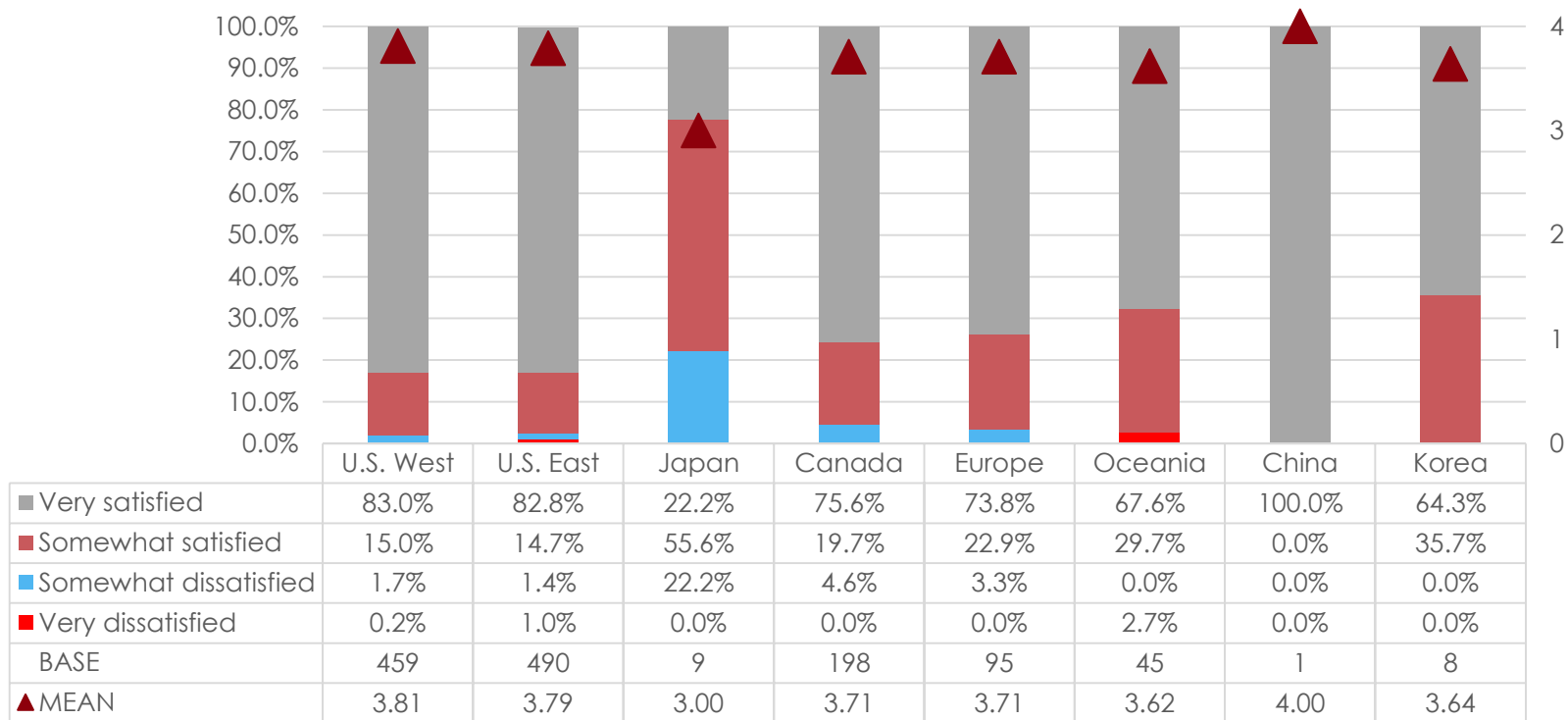
# SATISFACTION – DINING

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



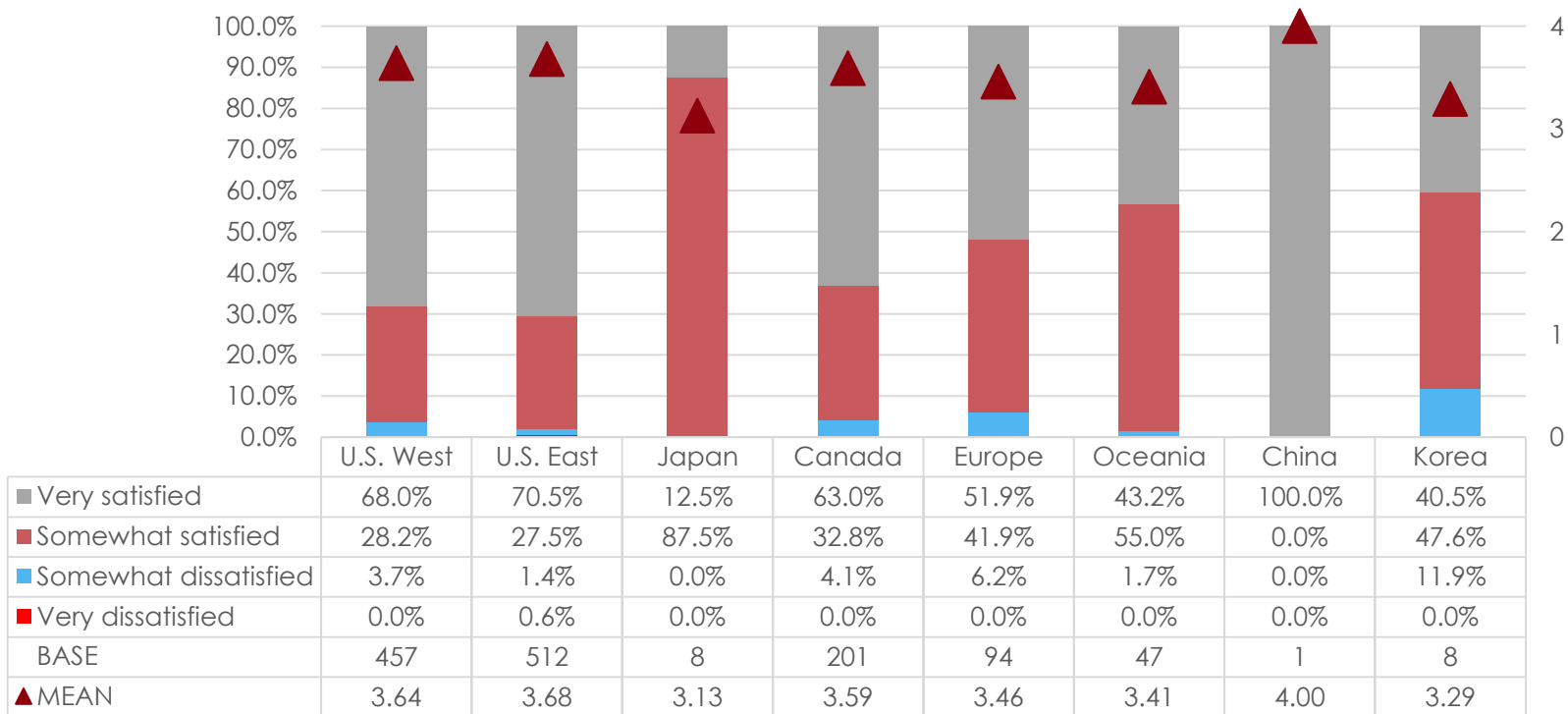
# SATISFACTION – BEACHES

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



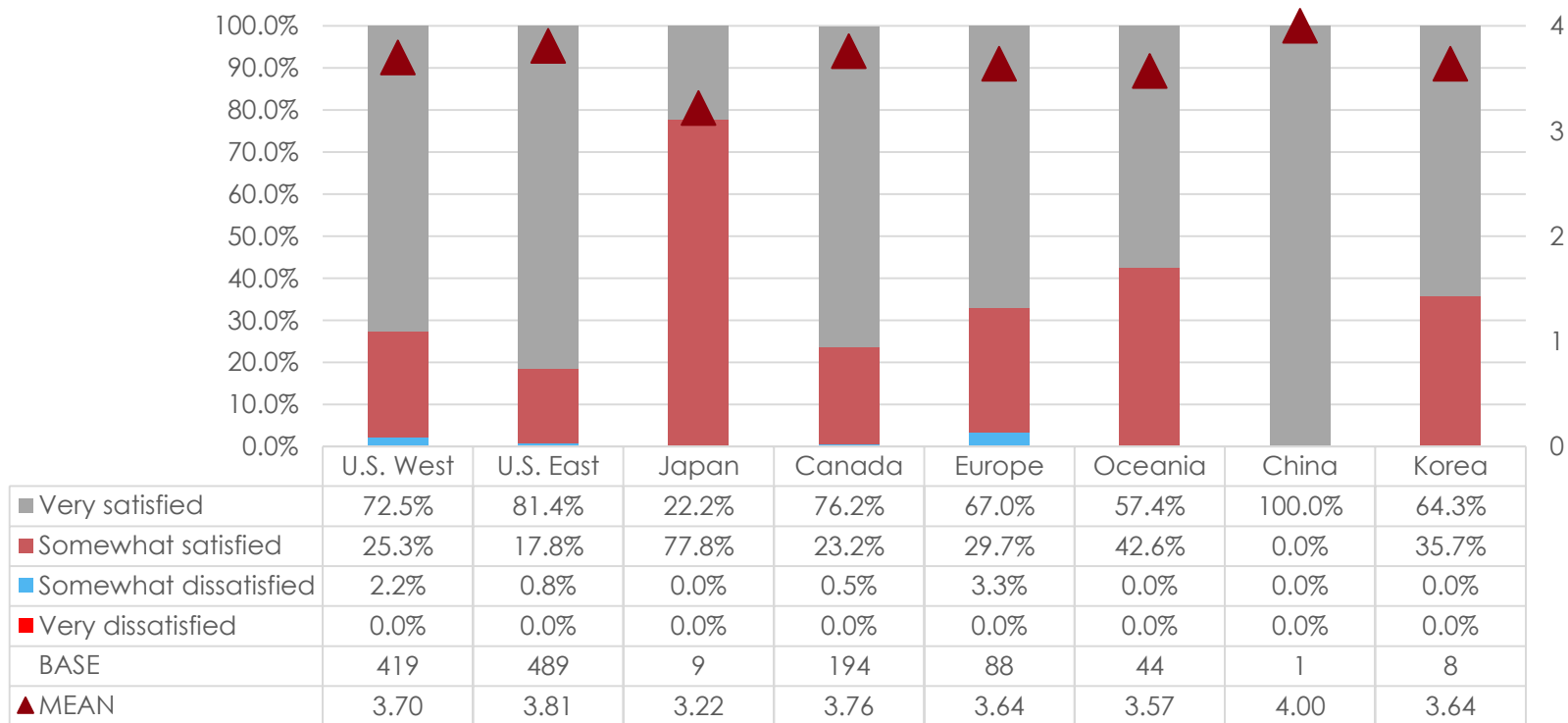
# SATISFACTION – PUBLIC AREAS

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



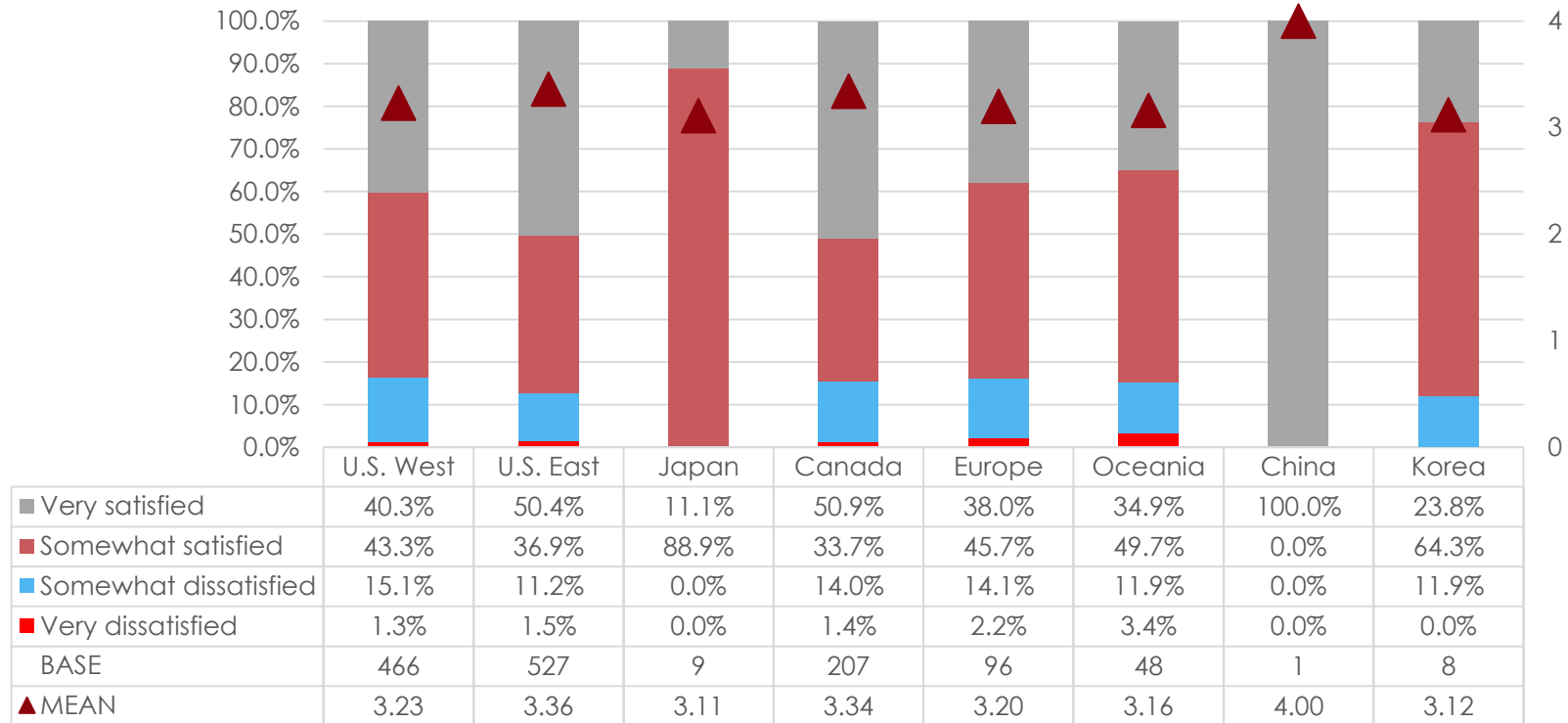
# SATISFACTION – PARKS

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



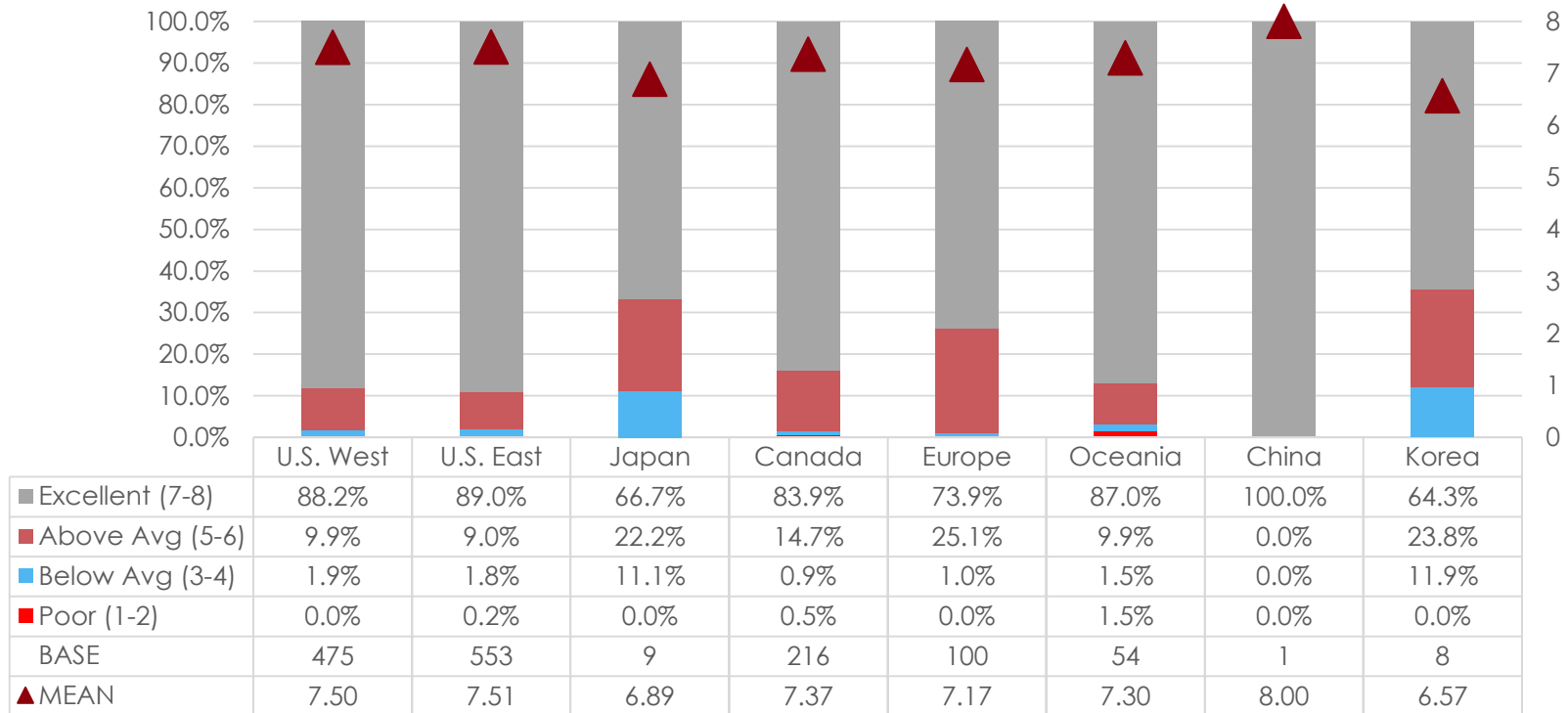
# SATISFACTION – ROADS

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



# FRIENDLINESS OF KAUA'I RESIDENTS

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





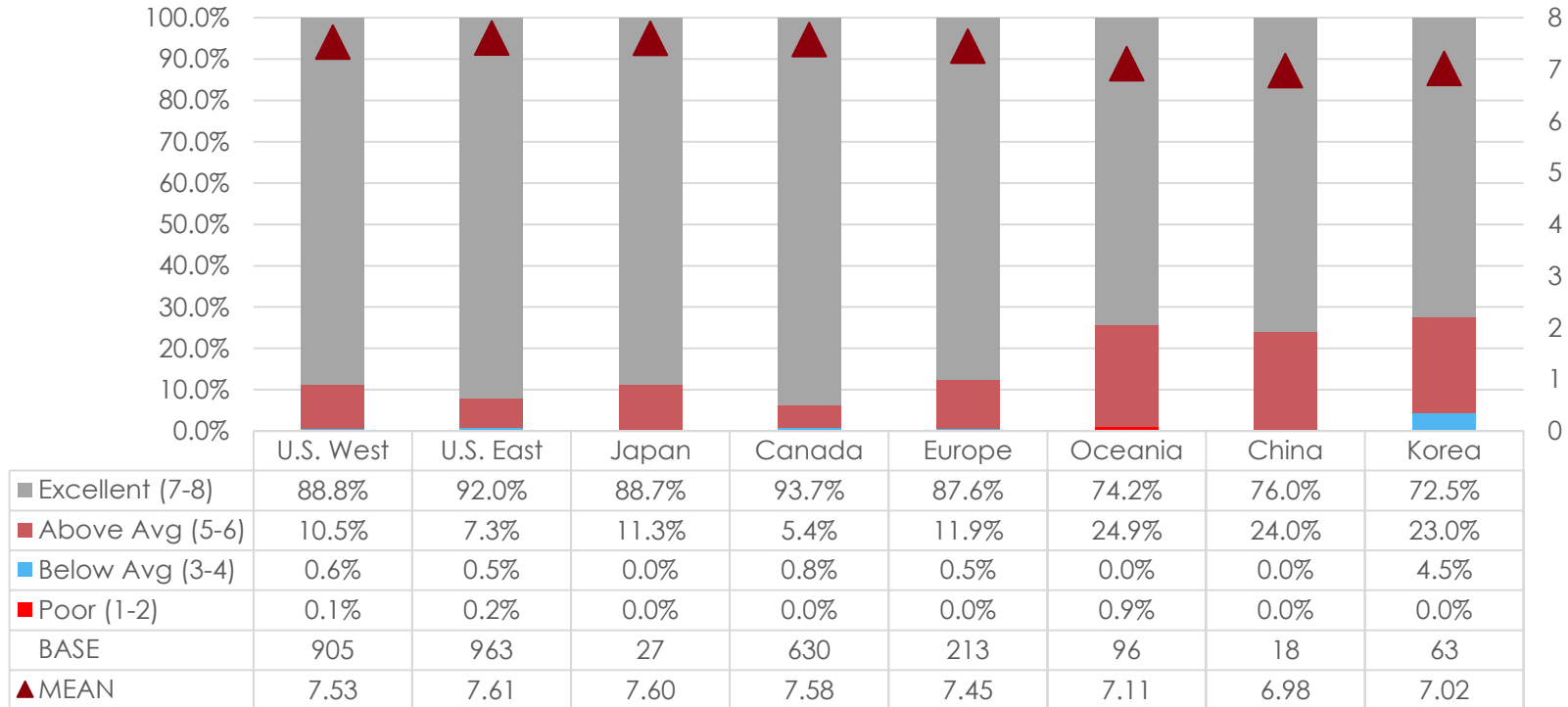
## TOP INFLUENCERS – KAUA'I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Been here before</b>	46.1%	25.5%	22.2%	21.2%	9.4%	12.4%	0.0%	0.0%
<b>Friend recommendation</b>	31.8%	27.5%	22.2%	29.0%	30.3%	21.4%	100.0%	16.7%
<b>Cruise line stop</b>	1.5%	21.0%	0.0%	15.5%	10.0%	34.3%	0.0%	0.0%
<b>Attending conference/ Event</b>	3.2%	3.5%	22.2%	2.4%	1.0%	2.3%	0.0%	0.0%
<b>Article/ blog</b>	2.1%	3.6%	22.2%	6.3%	13.2%	1.5%	0.0%	0.0%
<b>Travel agent</b>	1.0%	3.8%	0.0%	2.4%	12.1%	14.4%	0.0%	47.6%
<b>Never been to</b>	2.4%	2.8%	0.0%	2.3%	1.0%		0.0%	0.0%
<b>Visit friends/ family</b>	1.7%	1.5%	0.0%	3.4%	1.0%	3.8%	0.0%	0.0%
<b>Social media post</b>	0.8%	1.3%	0.0%	4.3%	7.3%	6.1%	0.0%	0.0%
<b>Natural beauty</b>	1.3%	1.1%	0.0%	1.0%	3.1%	1.5%	0.0%	11.9%

# SECTION – MAUI

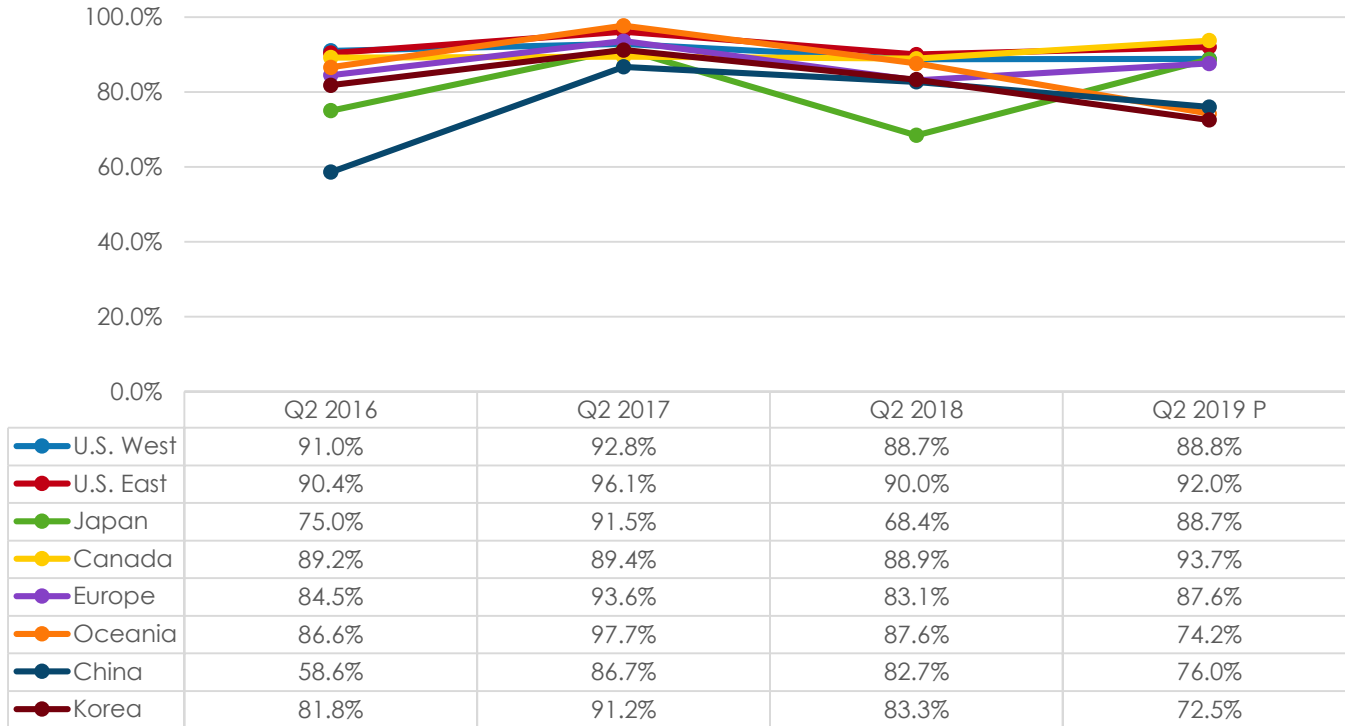
# SATISFACTION – MAUI

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



# SATISFACTION – MAUI

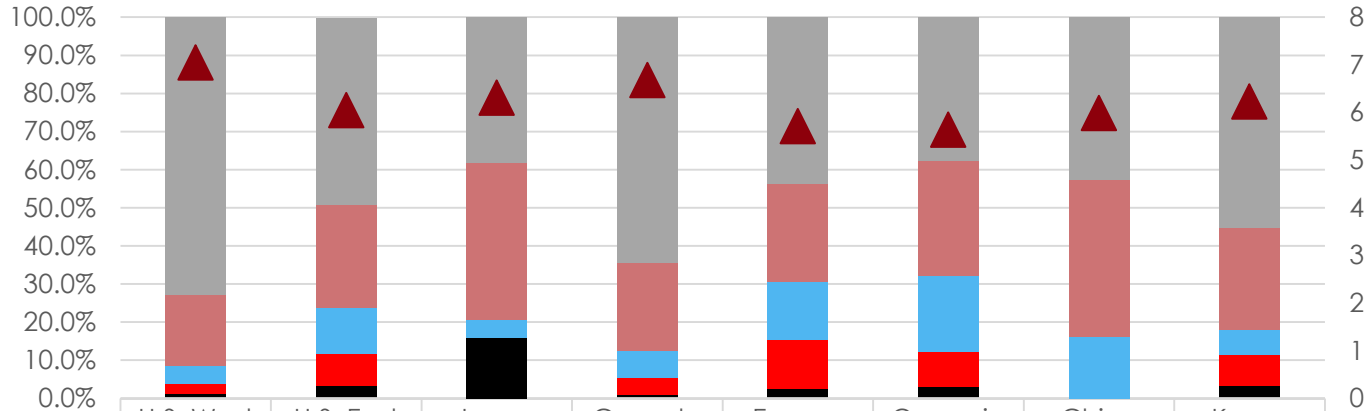
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

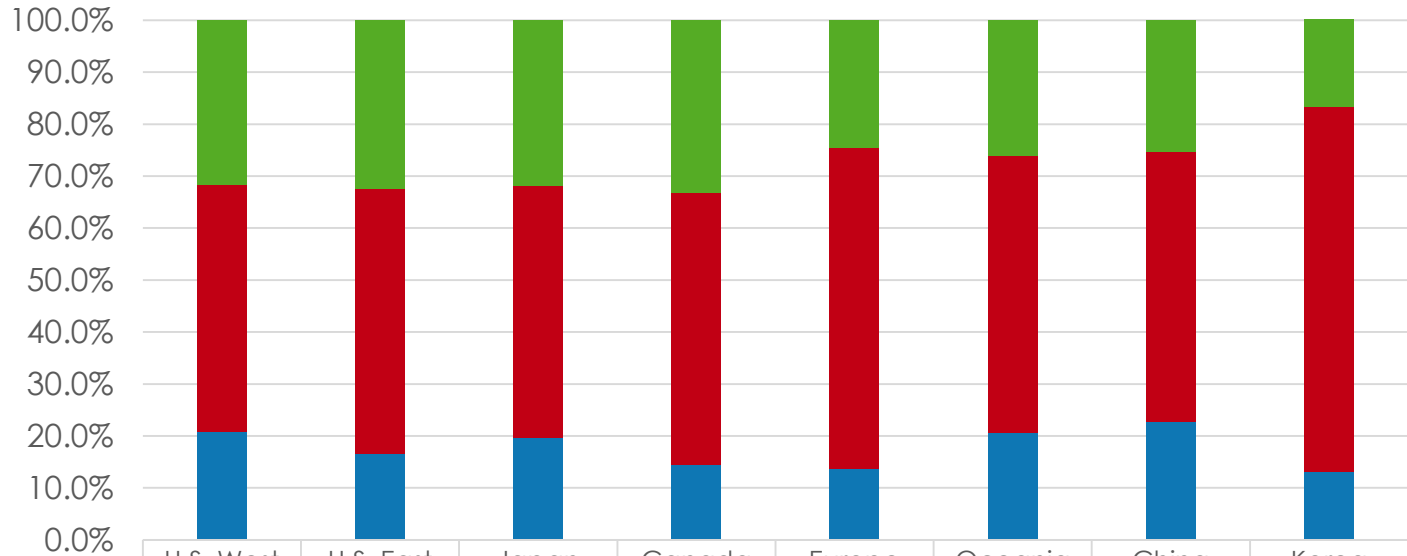
# LIKELIHOOD OF RETURN VISIT – MAUI

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



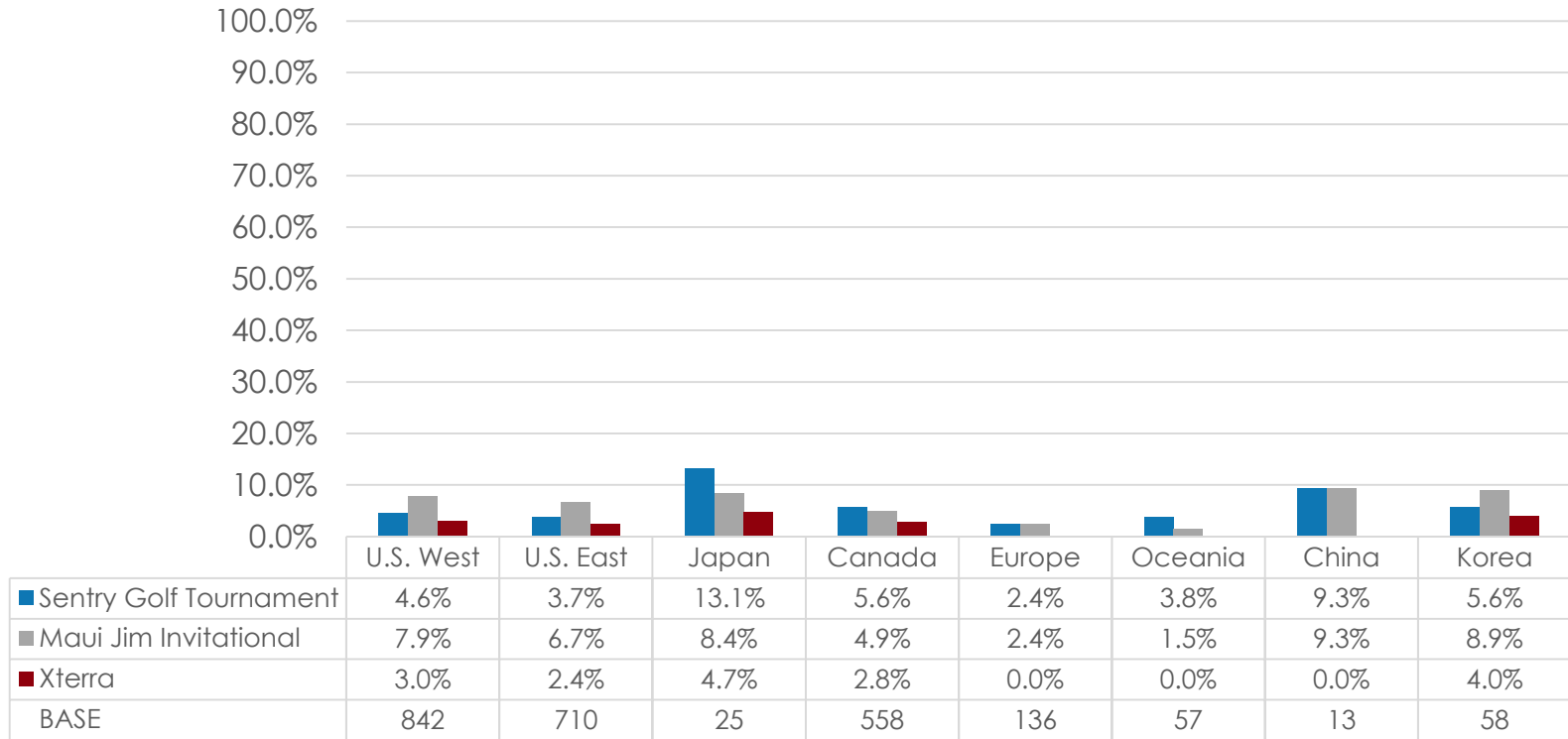
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	72.8%	49.1%	38.2%	64.3%	43.7%	37.6%	42.6%	55.3%
Somewhat likely (5-6)	18.6%	27.2%	41.2%	23.2%	25.8%	30.4%	41.4%	26.7%
Somewhat unlikely (3-4)	4.9%	11.8%	4.7%	7.1%	15.0%	19.8%	16.0%	6.6%
Very unlikely (1-2)	2.5%	8.6%	0.0%	4.4%	13.1%	9.1%	0.0%	8.2%
Not sure	1.2%	3.2%	15.9%	0.9%	2.4%	3.1%	0.0%	3.3%
BASE	829	707	25	552	134	57	13	58
MEAN	7.05	6.05	6.31	6.68	5.71	5.64	5.99	6.23

# AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	31.6%	32.5%	31.8%	33.2%	24.5%	26.0%	25.3%	16.8%
No Prior Awareness	47.7%	51.1%	48.6%	52.4%	61.8%	53.4%	52.0%	70.1%
Unsure	20.7%	16.5%	19.6%	14.4%	13.7%	20.6%	22.7%	13.2%
BASE	842	710	25	558	136	57	13	58

# AIDED ADVERTISING AWARENESS – MAUI EVENTS



## MOTIVATING FACTORS – MAUI

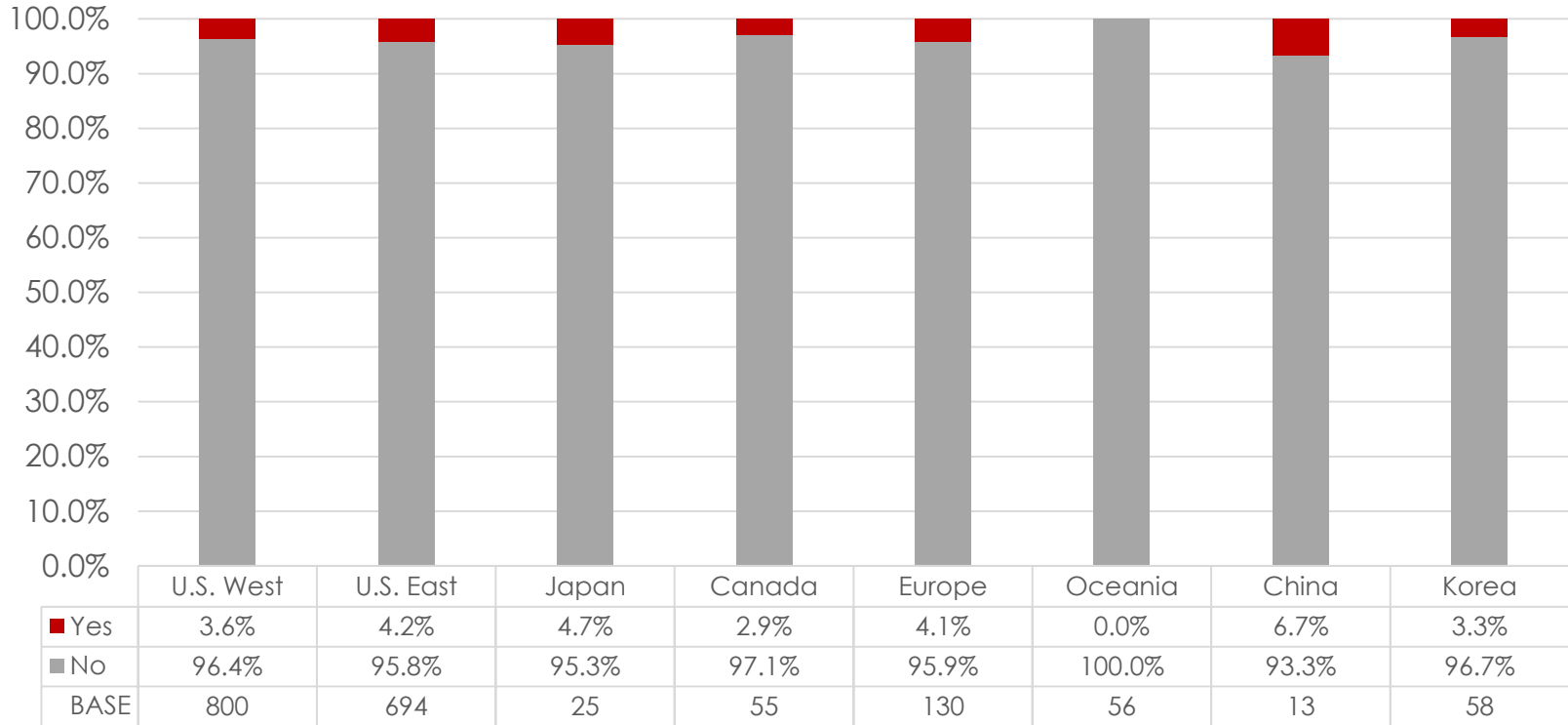
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>None of these</b>	67.2%	65.5%	45.7%	57.4%	54.9%	77.9%	41.4%	53.9%
<b>Hawaiian cultural events</b>	12.9%	13.3%	17.8%	10.8%	16.8%	6.9%	6.7%	3.3%
<b>Outdoor or sporting activities and events</b>	17.3%	16.4%	13.1%	18.9%	21.1%	5.3%	25.3%	11.5%
<b>Social media posts and videos</b>	9.4%	12.3%	8.4%	18.9%	15.7%	6.1%	26.6%	26.7%
<b>Hawaiian Music</b>	8.8%	7.2%	9.4%	7.4%	5.3%	1.5%	6.7%	1.6%
<b>TV programs/ Movies filmed in Hawaii</b>	5.7%	8.2%	18.6%	11.8%	14.9%	8.3%	32.0%	15.8%



## ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	2.7%	2.2%	3.5%	3.1%	0.9%	0.0%	5.0%	1.5%
Aquarium Maui /Maui Ocean Center	16.8%	11.5%	4.4%	21.3%	6.1%	4.0%	19.0%	7.3%
Baldwin Missionary Home Museum	4.1%	3.6%	0.0%	3.8%	1.8%	3.1%	0.0%	0.0%
Hale Pa'i Printing House	0.0%	0.2%	0.0%	0.3%	0.8%	0.9%	0.0%	0.0%
Haleakala National Park	26.2%	32.3%	41.8%	40.8%	27.5%	11.8%	39.0%	52.6%
Haleki'i Pihana Heiau State Monument	0.9%	2.4%	3.5%	2.4%	0.0%	0.9%	0.0%	0.0%
Hana Cultural Center	6.8%	12.6%	0.0%	12.4%	10.9%	6.1%	31.0%	3.6%
Iao Valley State Monument	13.8%	9.5%	7.8%	18.5%	12.6%	1.3%	0.0%	4.5%
Kepaniwai Park & Heritage Gardens	2.2%	3.6%	0.0%	3.7%	3.7%	2.7%	0.0%	5.1%
Kula Botanical Garden	5.9%	5.3%	6.9%	7.9%	5.9%	1.8%	12.0%	3.0%
Maui Historical Society Bailey House Museum	2.7%	1.6%	3.5%	2.9%	0.9%	2.7%	0.0%	1.5%
Whaler's Village Museum	13.6%	9.5%	10.4%	11.0%	7.4%	6.6%	15.0%	3.0%
Wo Hing Temple Museum	1.5%	1.0%	3.5%	1.9%	0.8%	0.0%	20.0%	0.0%

# VISITED MAUI FOR SPECIFIC EVENT



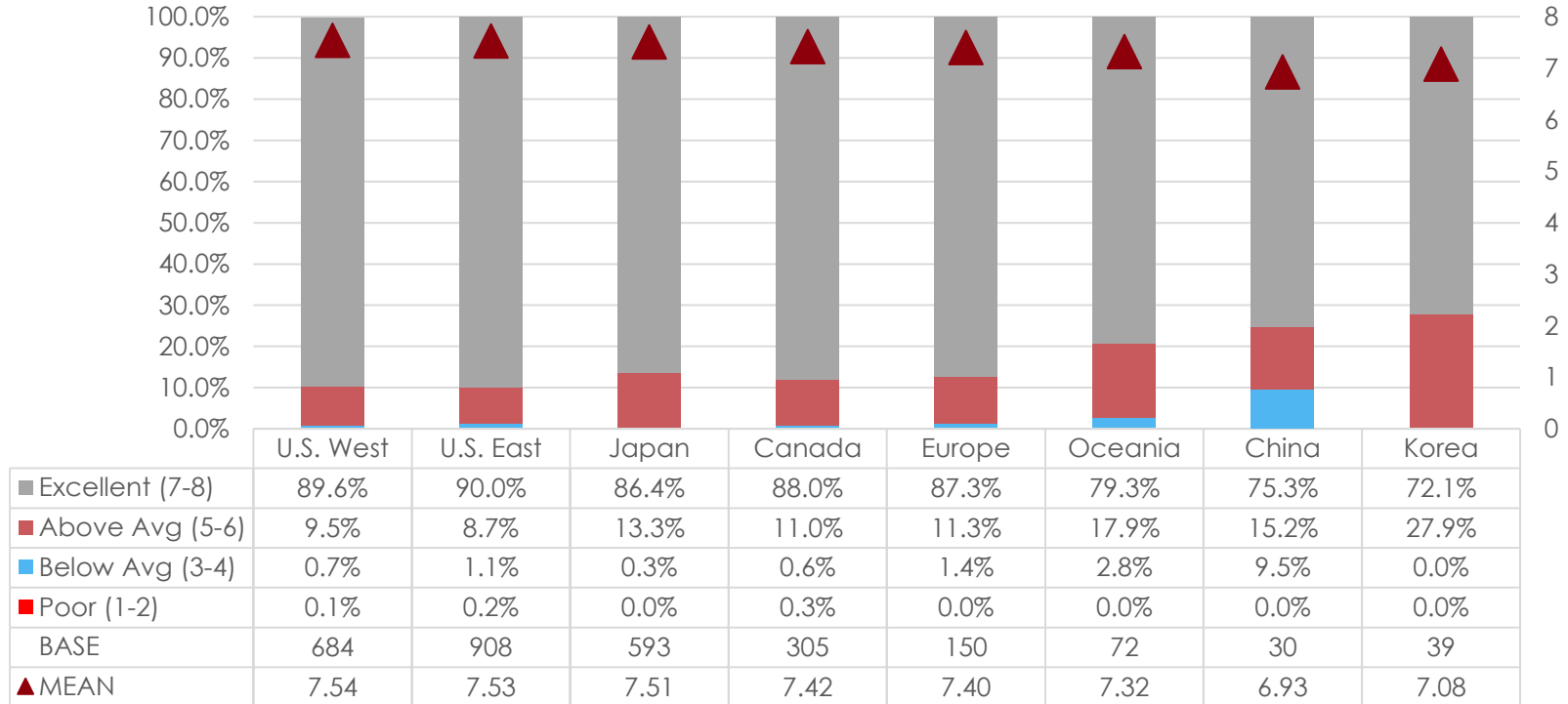
## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Wedding/ honeymoon, anniversary/ birthday/ funeral</b>	42.9%	25.1%	0.0%	56.8%	20.0%	0.0%	0.0%	37.1%
<b>Other</b>	14.3%	24.6%	0.0%	21.2%	40.0%	100.0%	0.0%	17.7%
<b>Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training</b>	3.6%	28.8%	0.0%	7.5%	20.0%	0.0%	50.0%	11.8%
<b>Other Festival/ concert</b>	17.9%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	13.2%
<b>Other sporting event</b>	10.6%	0.0%	0.0%	14.4%	0.0%	0.0%	0.0%	7.2%
<b>Hawaii Food &amp; Wine Festival</b>	3.6%	7.3%	100.0%	0.0%	0.0%	0.0%	50.0%	4.8%
<b>Maui Film Festival</b>	7.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%
<b>Whale Watching</b>	0.0%	3.6%	0.0%	0.0%	20.0%	0.0%	0.0%	1.2%
<b>Maui Marathon</b>	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%

# SECTION – ISLAND OF HAWAI‘I

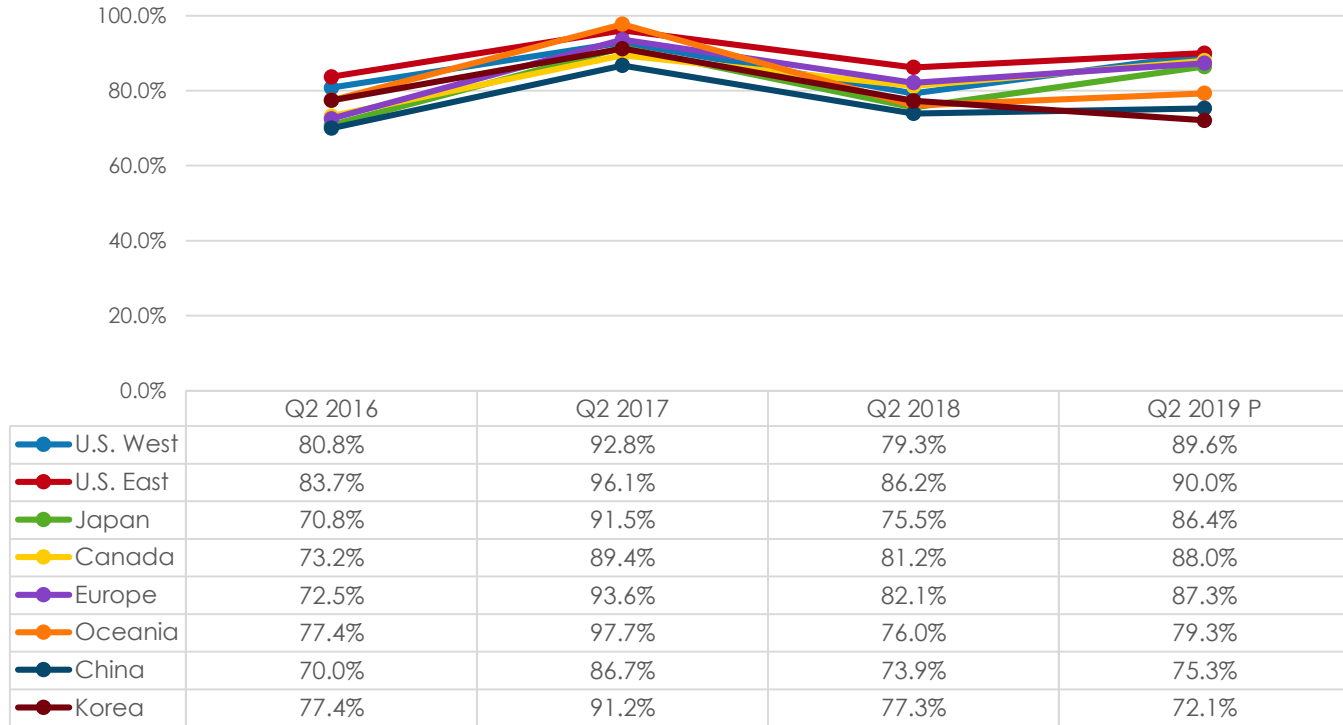
# SATISFACTION – ISLAND OF HAWAI‘I

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



# SATISFACTION – ISLAND OF HAWAI‘I

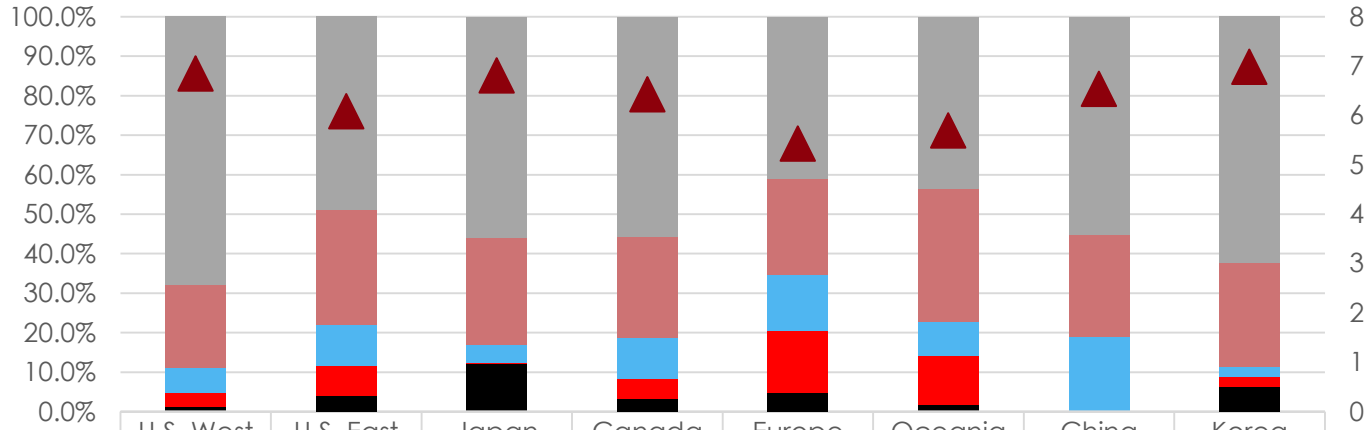
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

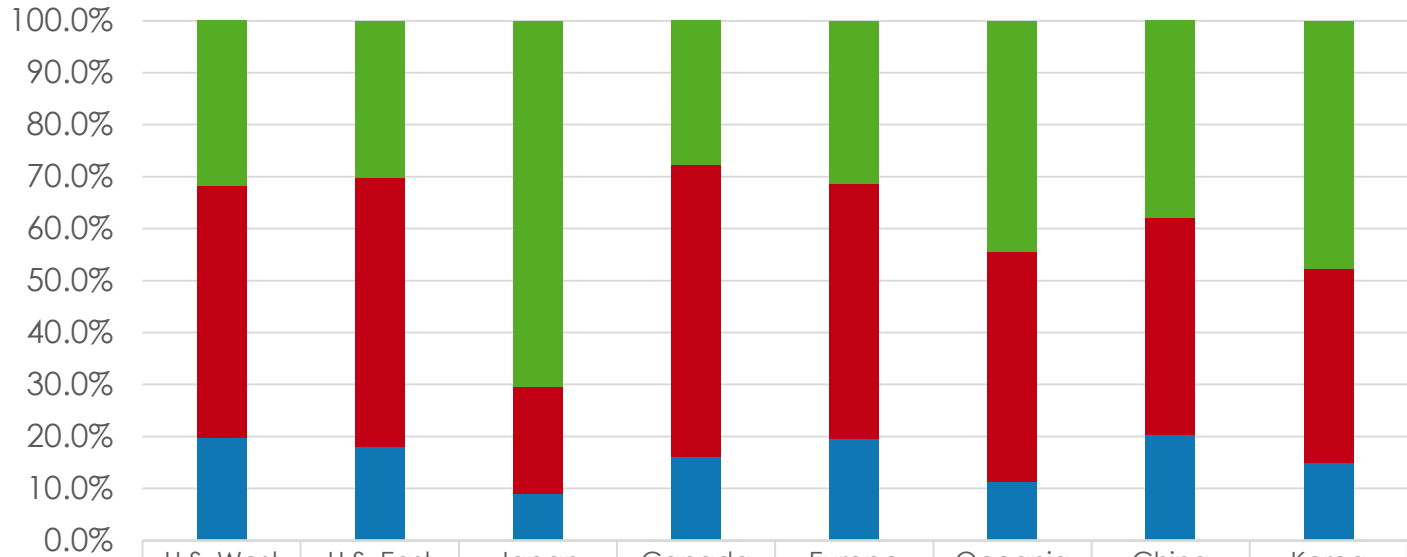
# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	68.1%	49.0%	55.9%	55.6%	40.8%	43.4%	55.2%	62.6%
Somewhat likely (5-6)	20.8%	29.1%	27.2%	25.7%	24.6%	33.9%	25.9%	26.2%
Somewhat unlikely (3-4)	6.6%	10.3%	4.4%	10.4%	14.1%	8.5%	18.9%	2.6%
Very unlikely (1-2)	3.5%	7.9%	0.5%	5.1%	15.6%	12.2%	0.0%	2.6%
Not sure	1.1%	3.8%	12.0%	3.2%	4.8%	1.9%	0.0%	6.2%
BASE	635	652	559	256	104	43	27	35
MEAN	6.85	6.09	6.81	6.43	5.43	5.70	6.54	6.99

# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI'I



■ Aided Ad Awareness	31.8%	30.2%	70.4%	27.8%	31.3%	44.3%	37.9%	47.7%
■ No Prior Awareness	48.4%	51.8%	20.6%	56.2%	49.1%	44.3%	41.9%	37.4%
■ Unsure	19.8%	18.0%	9.0%	16.1%	19.6%	11.3%	20.3%	14.9%
BASE	644	667	559	261	104	43	28	35



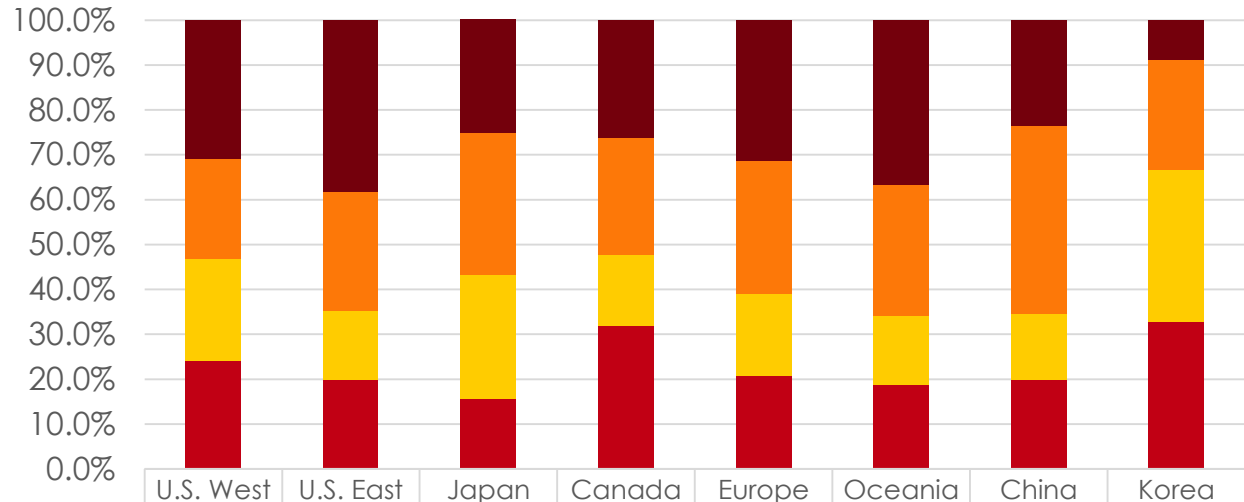
# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Akaka Falls</b>	25.5%	27.2%	21.2%	29.4%	33.8%	20.8%	13.9%	28.8%
<b>Botanical Gardens</b>	16.4%	14.2%	3.8%	17.9%	20.2%	11.2%	10.8%	4.6%
<b>H.N. Greenwell Store</b>	2.3%	2.9%	0.7%	3.8%	1.3%			4.6%
<b>Hawaii Volcanoes National Park</b>	42.8%	45.5%	53.5%	50.8%	49.0%	42.0%	61.4%	33.8%
<b>Hilo Farmers Market</b>	22.6%	18.4%	13.8%	21.6%	22.1%	13.5%	7.6%	7.8%
<b>Hulihe e Palace</b>	6.3%	4.9%	10.1%	7.6%	8.1%	3.3%	9.5%	10.0%
<b>Imiloa Astronomy Ctr</b>	2.3%	2.8%	2.5%	3.0%	4.6%	6.1%	15.8%	4.6%
<b>Kaloko Honokohau National Historical Park</b>	10.5%	9.5%	2.2%	10.2%	7.9%	6.1%	12.7%	5.5%
<b>Kona Coffee Living History Farm</b>	13.7%	14.9%	25.6%	15.5%	12.1%	17.4%	9.5%	36.5%
<b>Lili uokalani Park and Garden</b>	8.3%	7.9%	3.9%	4.6%	6.5%	2.3%	0.0%	10.0%

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

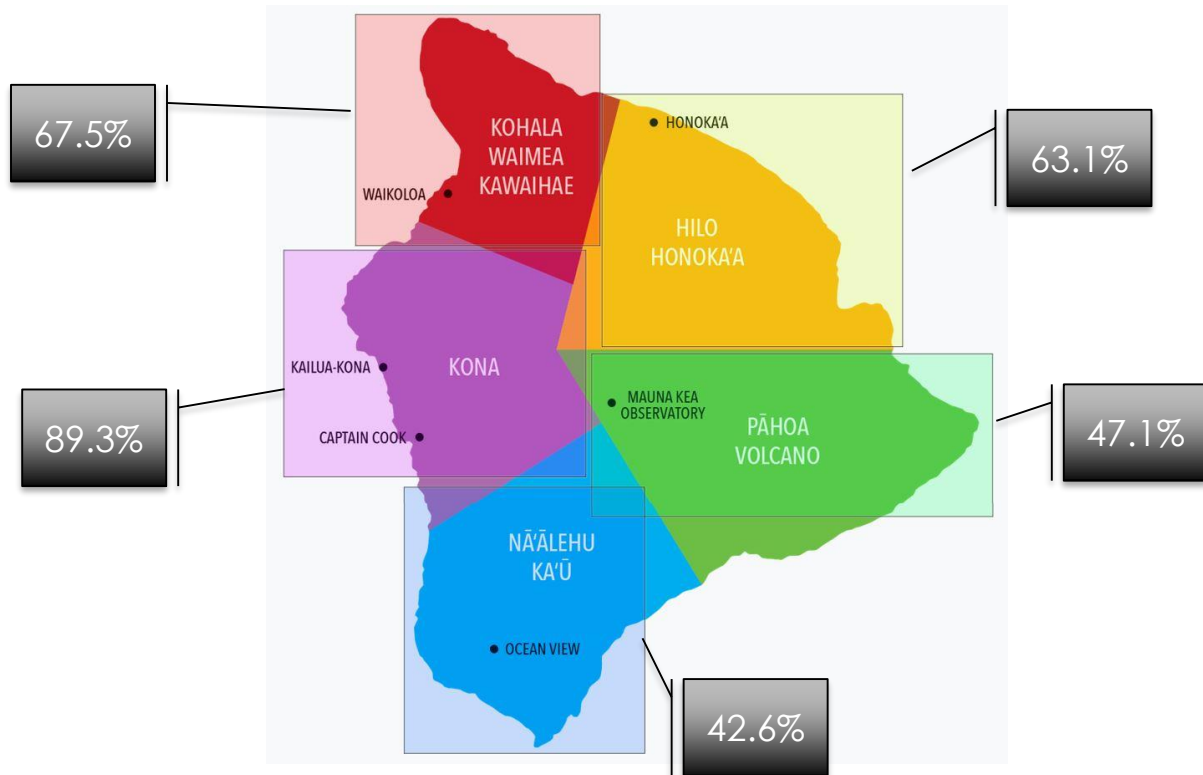
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Lyman House Memorial Museum</b>	1.3%	1.1%	0.6%	2.3%	0.7%	0.0%	0.0%	2.3%
<b>Maunakea</b>	15.2%	15.3%	48.7%	22.1%	29.8%	9.6%	45.6%	30.1%
<b>Orchid Farm</b>	3.4%	2.9%	0.2%	2.3%	4.5%	5.0%	9.5%	3.2%
<b>Pacific Tsunami Museum</b>	3.5%	2.2%	1.0%	3.2%	2.6%	2.8%	6.3%	3.2%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	6.0%	3.7%	1.1%	6.7%	3.8%	3.3%	0.0%	0.0%
<b>Pu'uhonua o Honaunau National Historical Park</b>	19.4%	16.1%	5.4%	19.9%	19.8%	6.1%	15.8%	7.8%
<b>Pu'ukohola Heia National Historical Site</b>	9.6%	8.5%	3.5%	8.2%	5.8%	4.5%	0.0%	2.3%
<b>Punalu u Black Sand Beach</b>	28.7%	30.4%	23.8%	41.0%	33.5%	21.2%	45.6%	13.2%
<b>Rainbow Falls</b>	26.1%	29.3%	19.4%	26.2%	33.7%	25.2%	25.3%	16.0%
<b>Volcano Art Center</b>	8.6%	7.7%	11.0%	6.2%	12.5%	12.8%	12.7%	4.6%

# TRAVEL ON ISLAND OF HAWAI'I

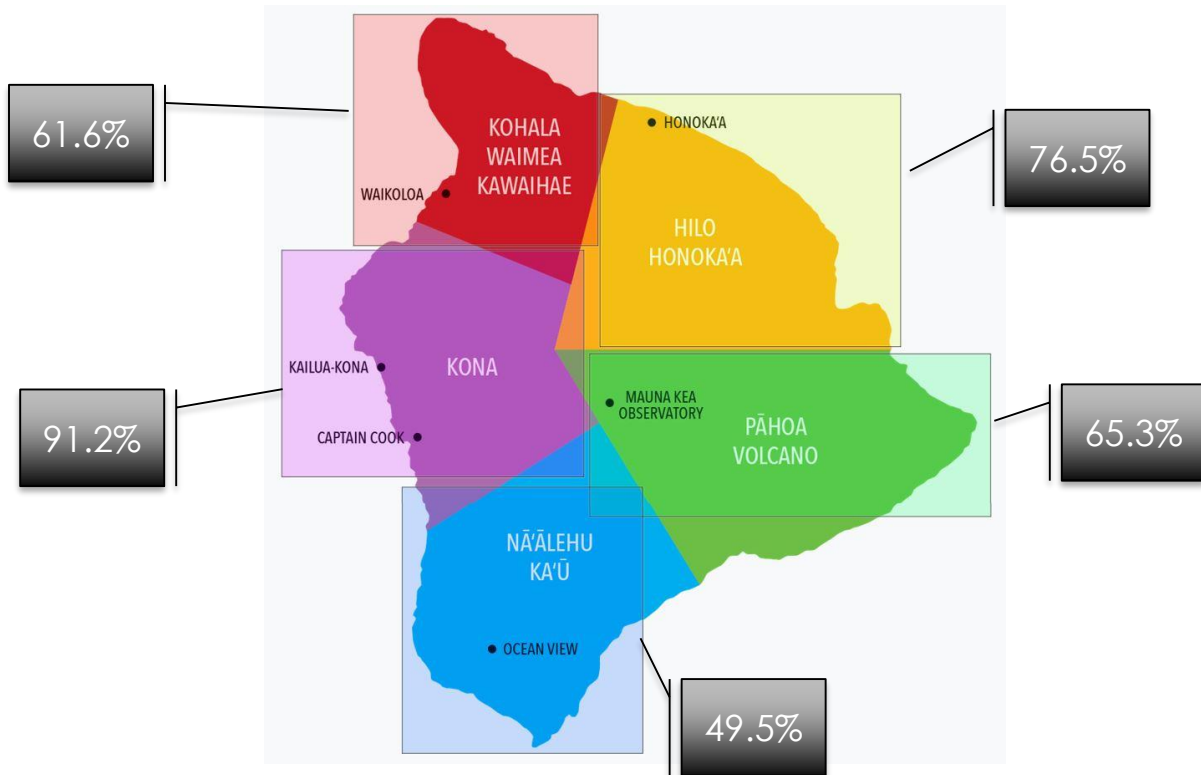


Traveled to other side of island	30.9%	38.3%	25.3%	26.1%	31.4%	36.7%	23.5%	8.7%
Traveled more than 1 hour	22.3%	26.4%	31.5%	26.2%	29.5%	29.3%	41.9%	24.6%
Traveled 1 hour or less one way to reach activity	22.7%	15.4%	27.6%	15.7%	18.3%	15.2%	14.7%	33.8%
Enjoy activities- short drive from accommodations	24.1%	19.9%	15.7%	32.0%	20.8%	18.9%	19.9%	32.8%
BASE	610	636	557	253	103	43	26	35

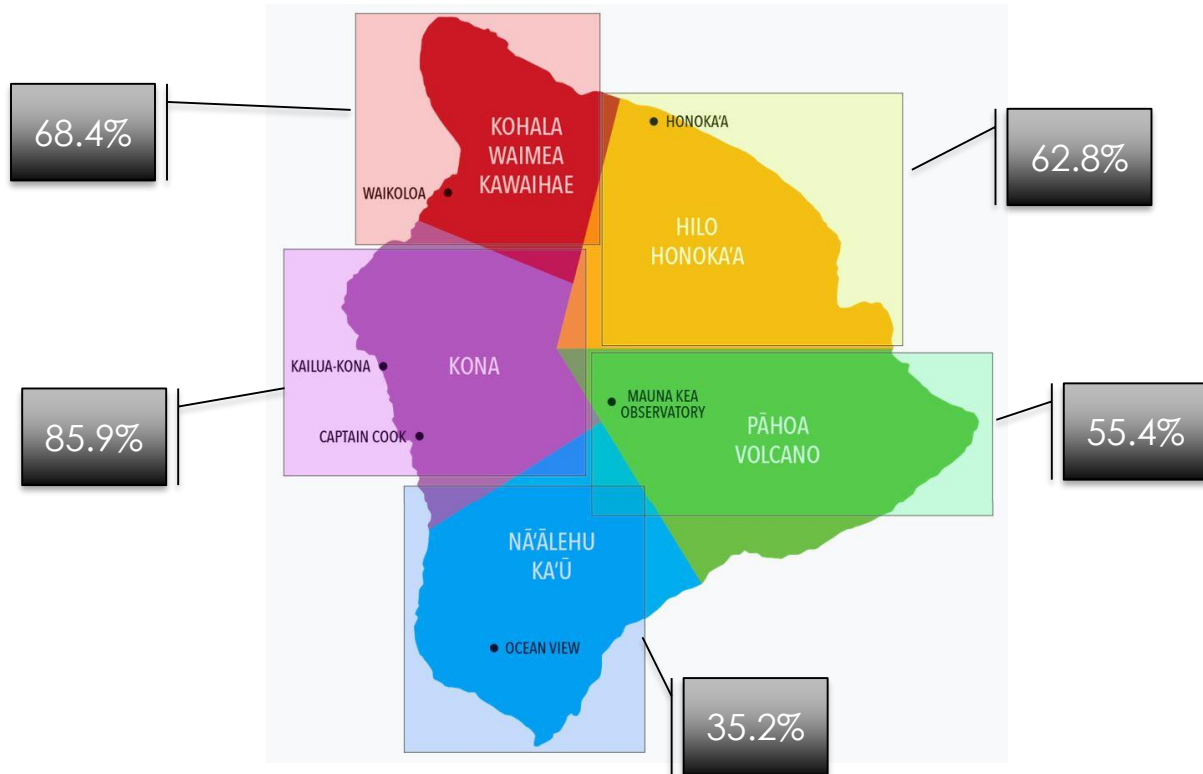
# AREAS VISITED U.S. WEST



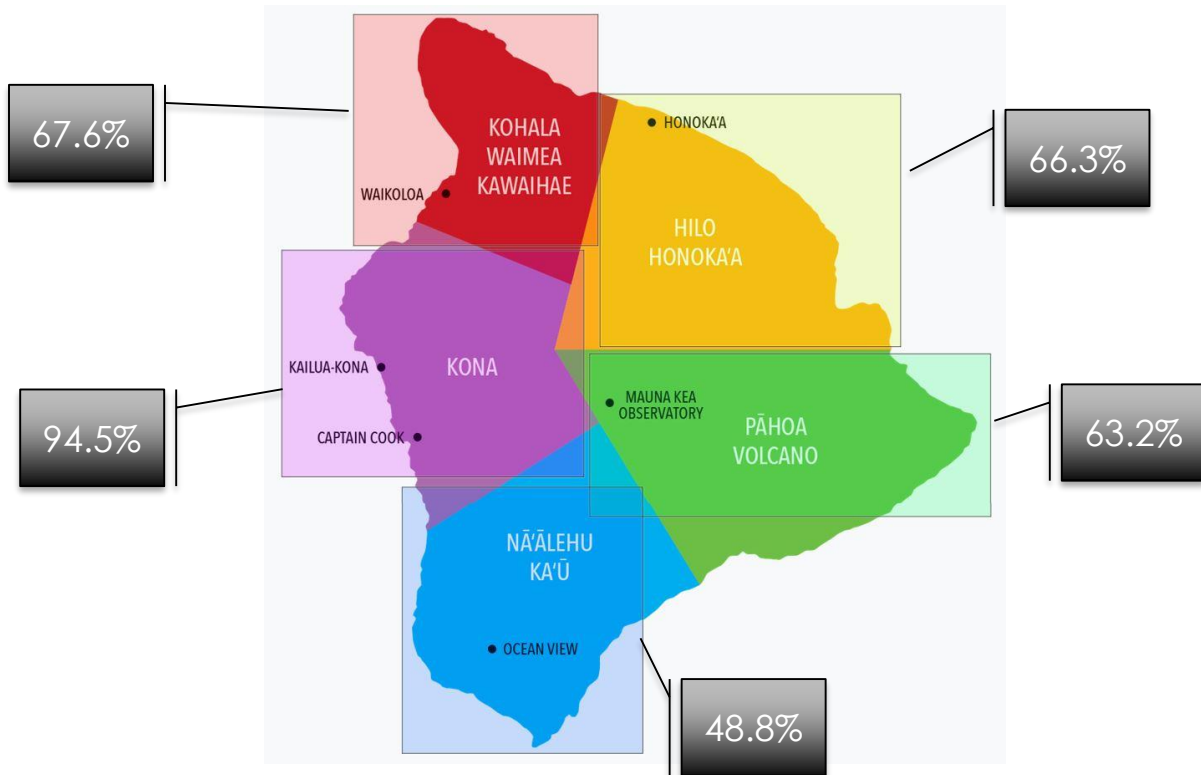
# AREAS VISITED U.S. EAST



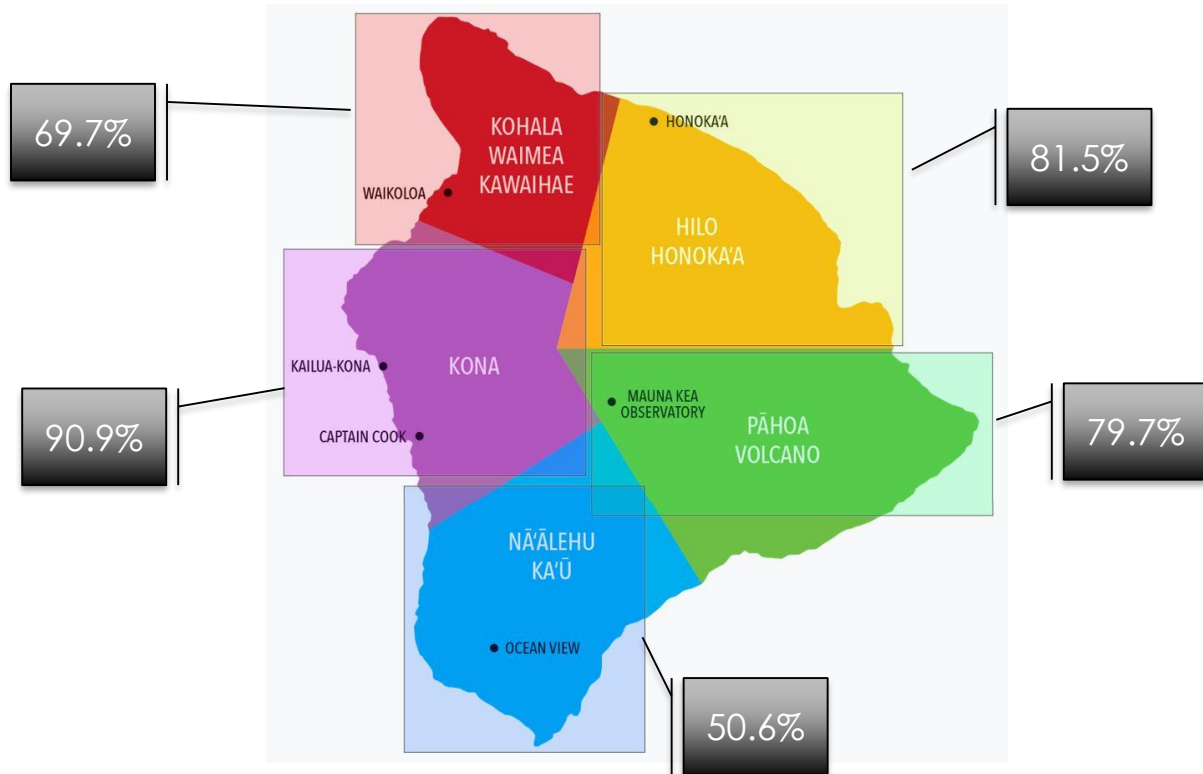
# AREAS VISITED JAPAN



# AREAS VISITED CANADA

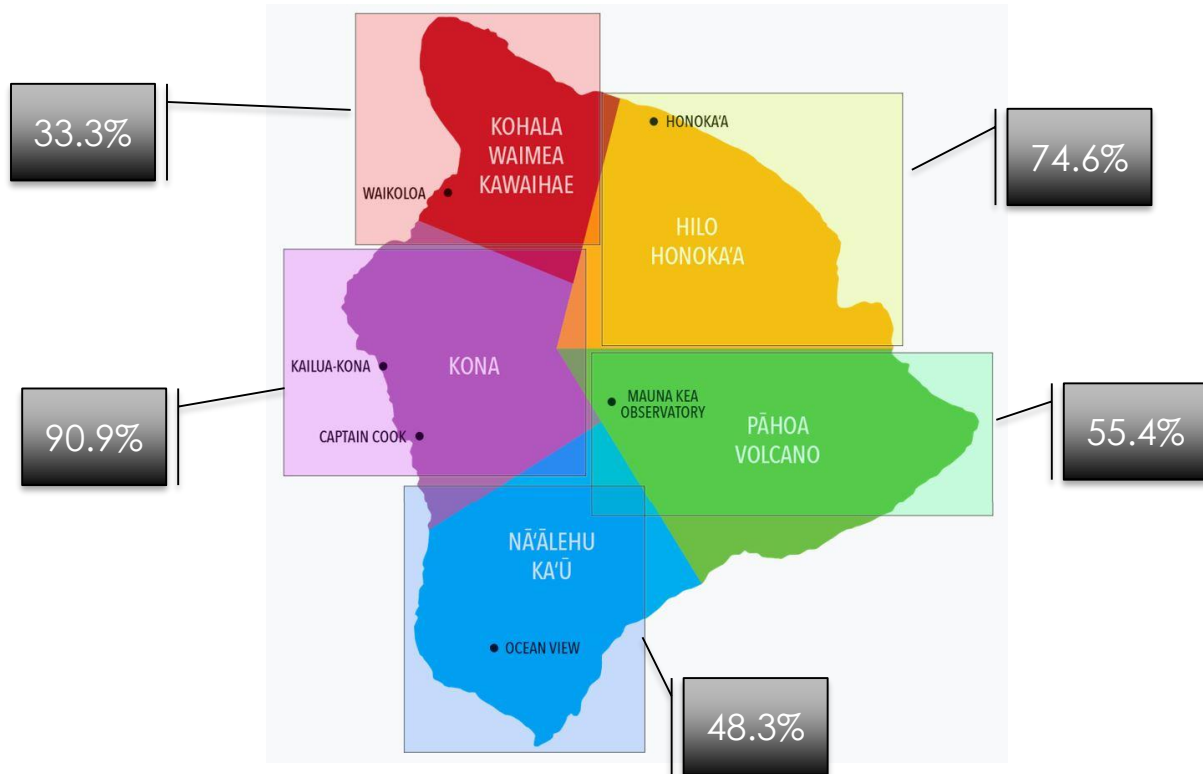


# AREAS VISITED EUROPE

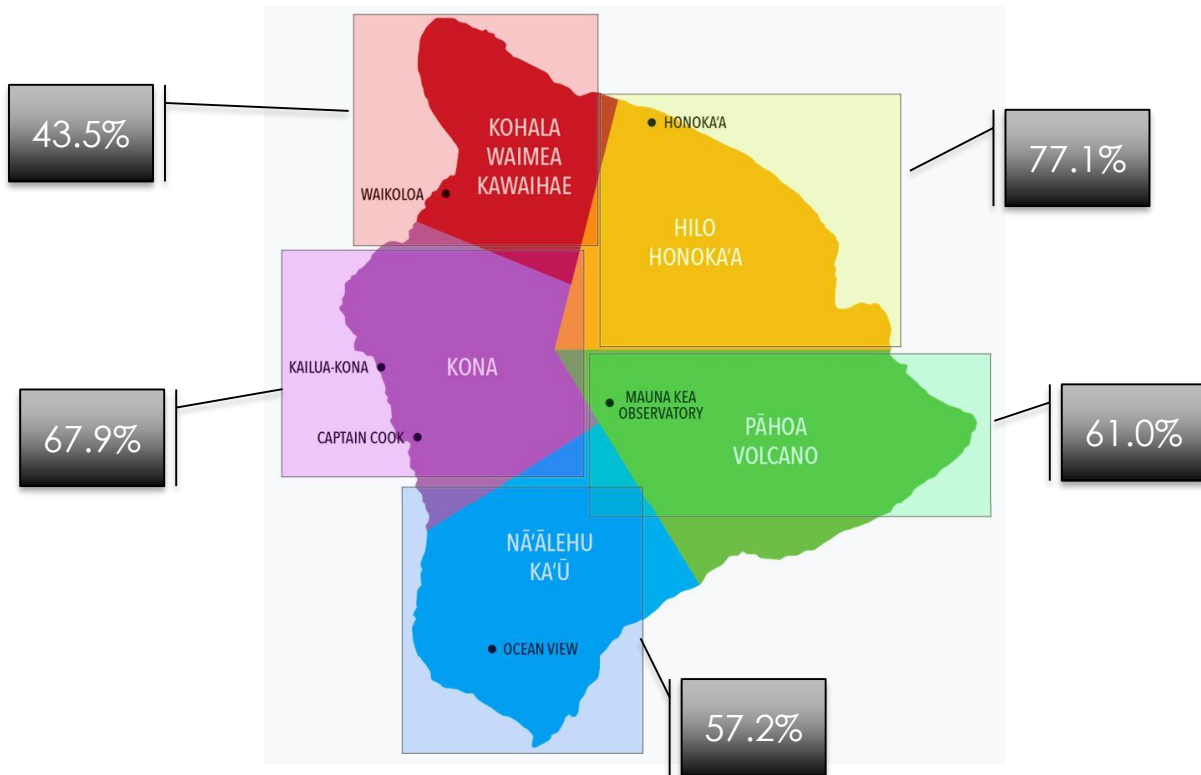




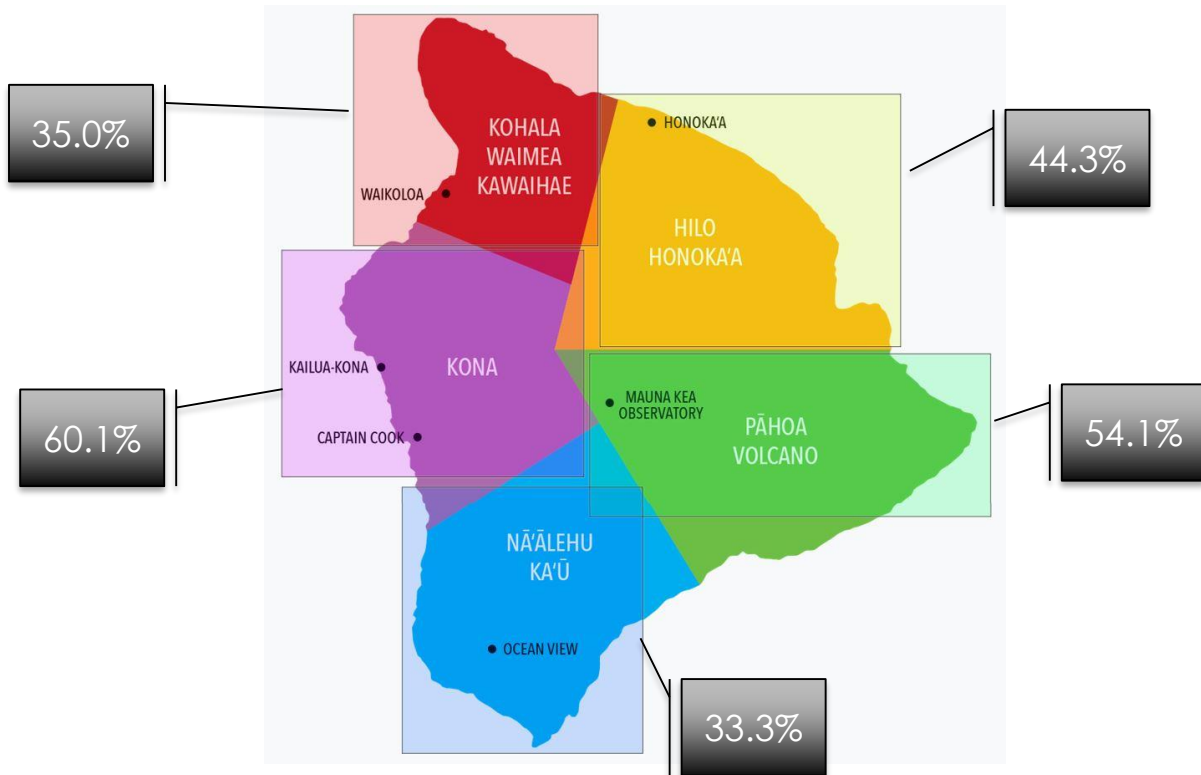
# AREAS VISITED OCEANIA



# AREAS VISITED CHINA

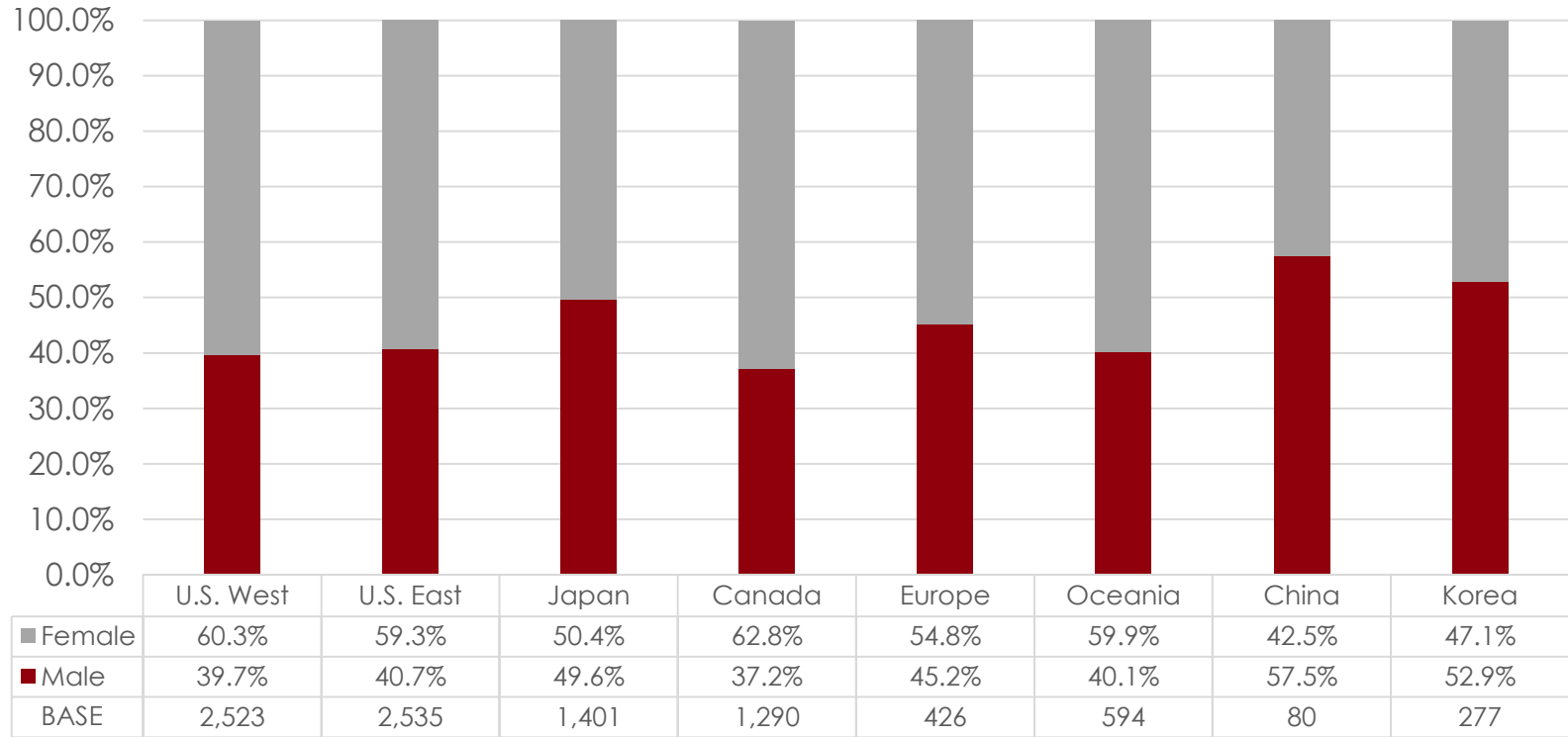


# AREAS VISITED KOREA

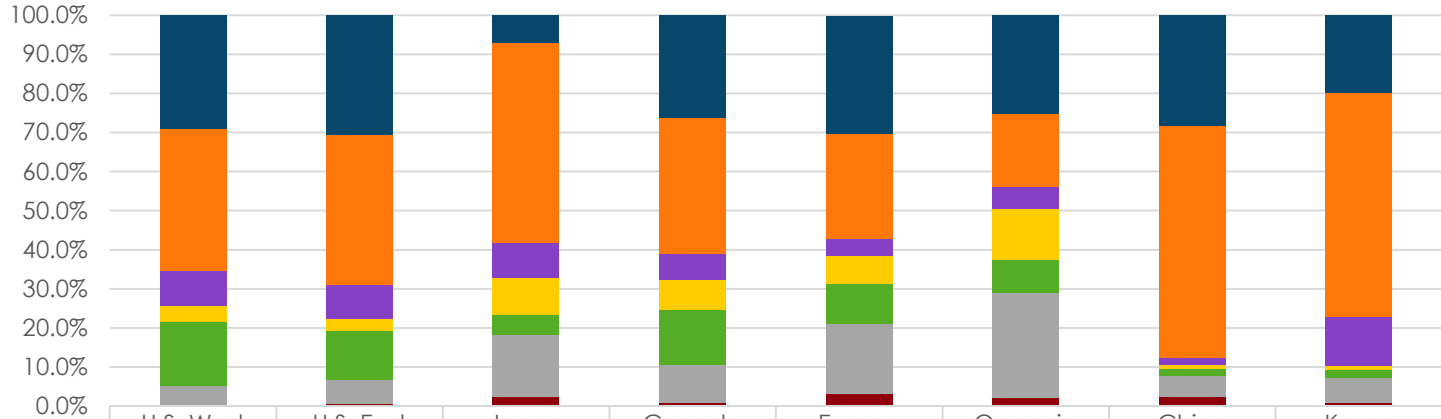


# SECTION – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Post-Graduate	29.1%	30.6%	7.1%	26.2%	30.1%	25.1%	28.3%	19.9%
College Grad	36.2%	38.3%	51.1%	34.6%	27.1%	18.6%	59.3%	57.2%
Associate Degree	9.1%	8.7%	8.9%	6.8%	4.2%	5.8%	1.6%	12.6%
Vocational/ Tech	4.0%	3.0%	9.6%	7.5%	7.2%	12.9%	1.2%	1.1%
Some College	16.4%	12.7%	5.0%	14.1%	10.3%	8.5%	1.6%	2.0%
H.S. Grad	4.9%	6.1%	15.9%	9.7%	17.7%	26.8%	5.6%	6.2%
Some / No H.S.	0.3%	0.5%	2.4%	1.0%	3.3%	2.2%	2.3%	1.0%
BASE	2,516	2,530	1,398	1,286	426	594	80	277

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

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	5.6%	5.5%	7.3%	17.7%	10.7%
\$40,000 to \$59,999	6.9%	9.4%	10.2%	12.6%	10.0%
\$60,000 to \$79,999	10.4%	11.1%	11.8%	11.4%	10.4%
\$80,000 to \$99,999	8.8%	11.1%	11.0%	16.1%	11.8%
\$100,000 to \$124,999	15.6%	15.5%	15.3%	10.8%	11.1%
\$125,000 to \$149,999	12.1%	11.2%	12.8%	8.8%	14.9%
\$150,000 to \$174,999	9.7%	8.4%	8.5%	6.7%	9.8%
\$175,000 to \$199,999	6.9%	5.5%	6.3%	3.4%	6.5%
\$200,000 to \$249,999	9.4%	8.0%	4.8%	4.1%	6.1%
\$250,000 +	14.6%	14.3%	11.9%	8.4%	8.5%

## VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	16.8%
¥3.5 ¥4.5 million	15.0%
¥4.5 ¥5.5 million	11.8%
¥5.5 ¥6.5 million	8.3%
¥6.5 ¥7.5 million	7.0%
¥7.5 ¥8.5 million	8.0%
¥8.5 ¥10.0 million	8.6%
¥10.0 ¥15.0 million	12.7%
¥15.0 ¥20.0 million	5.5%
¥20.0 million +	6.4%



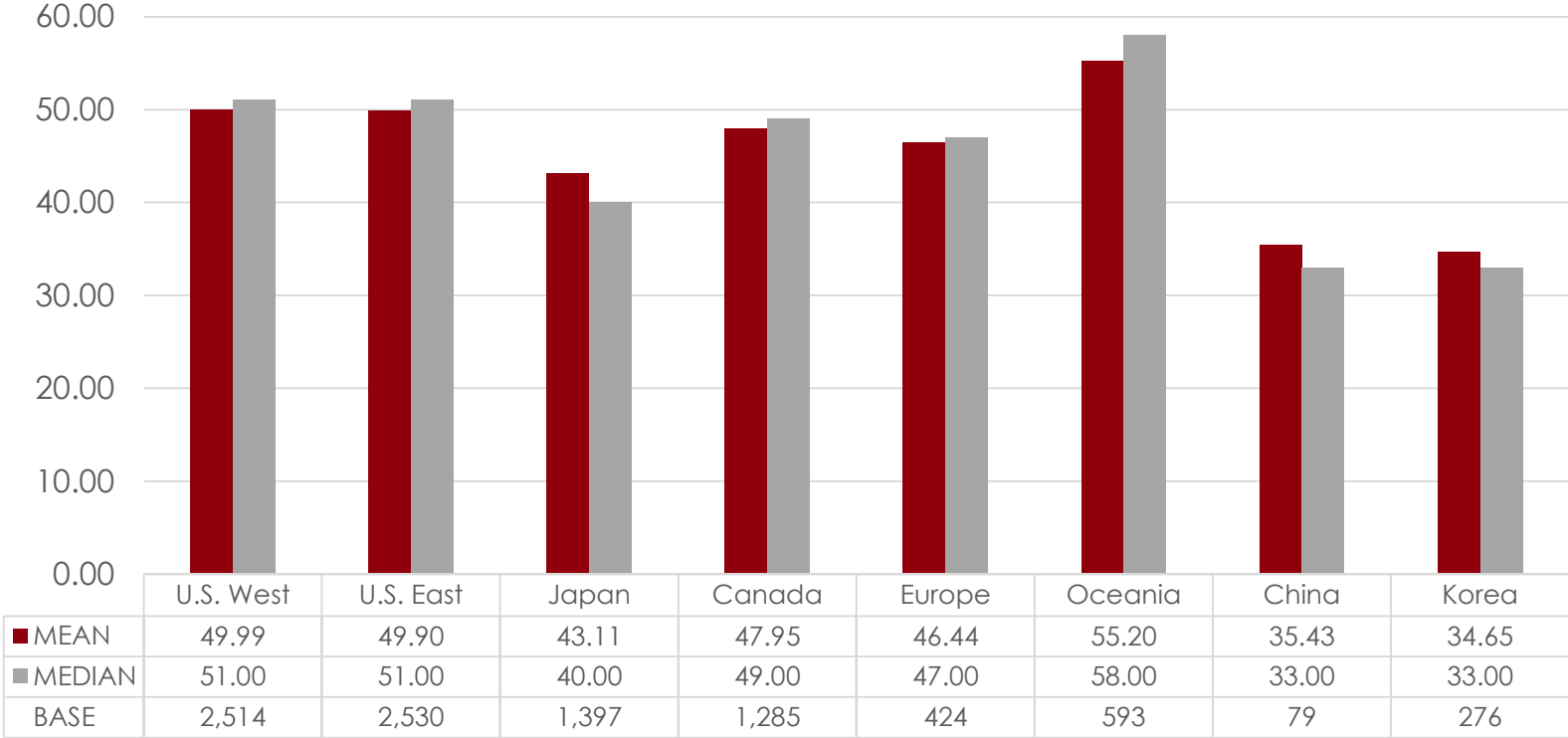
# VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	8.9%
₩16,305,000 21,171,999	9.4%
₩27,174,000 38,041,999	15.7%
₩38,044,000 48,911,999	14.2%
₩48,912,000 59,781,999	10.3%
₩59,782,000 70,652,999	11.5%
₩70,653,000 81,520,999	5.9%
₩81,521,000 92,390,999	3.7%
₩92,391,000 103,259,999	3.7%
₩103,260,000+	16.5%

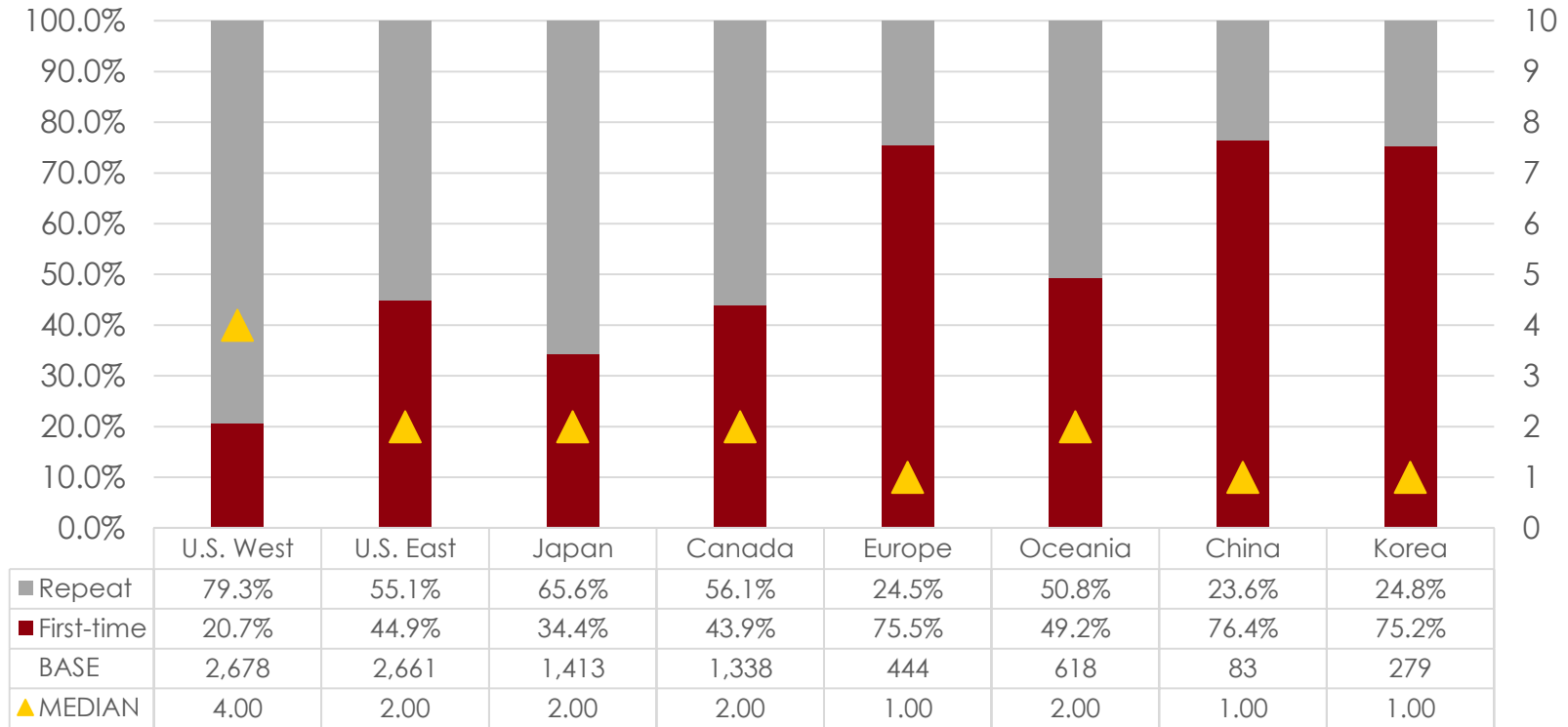
## VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	25.4%
¥250,800 ¥376,099	23.6%
¥376,100 ¥501,399	16.3%
¥501,400 ¥626,799	8.6%
¥626,800 ¥783,499	5.4%
¥783,500 ¥940,199	6.7%
¥940,200 ¥1,096,899	2.5%
¥1,096,900 ¥1,253,599	2.5%
¥1,253,600 ¥1,560,799	2.5%
¥1,560,800+	6.7%

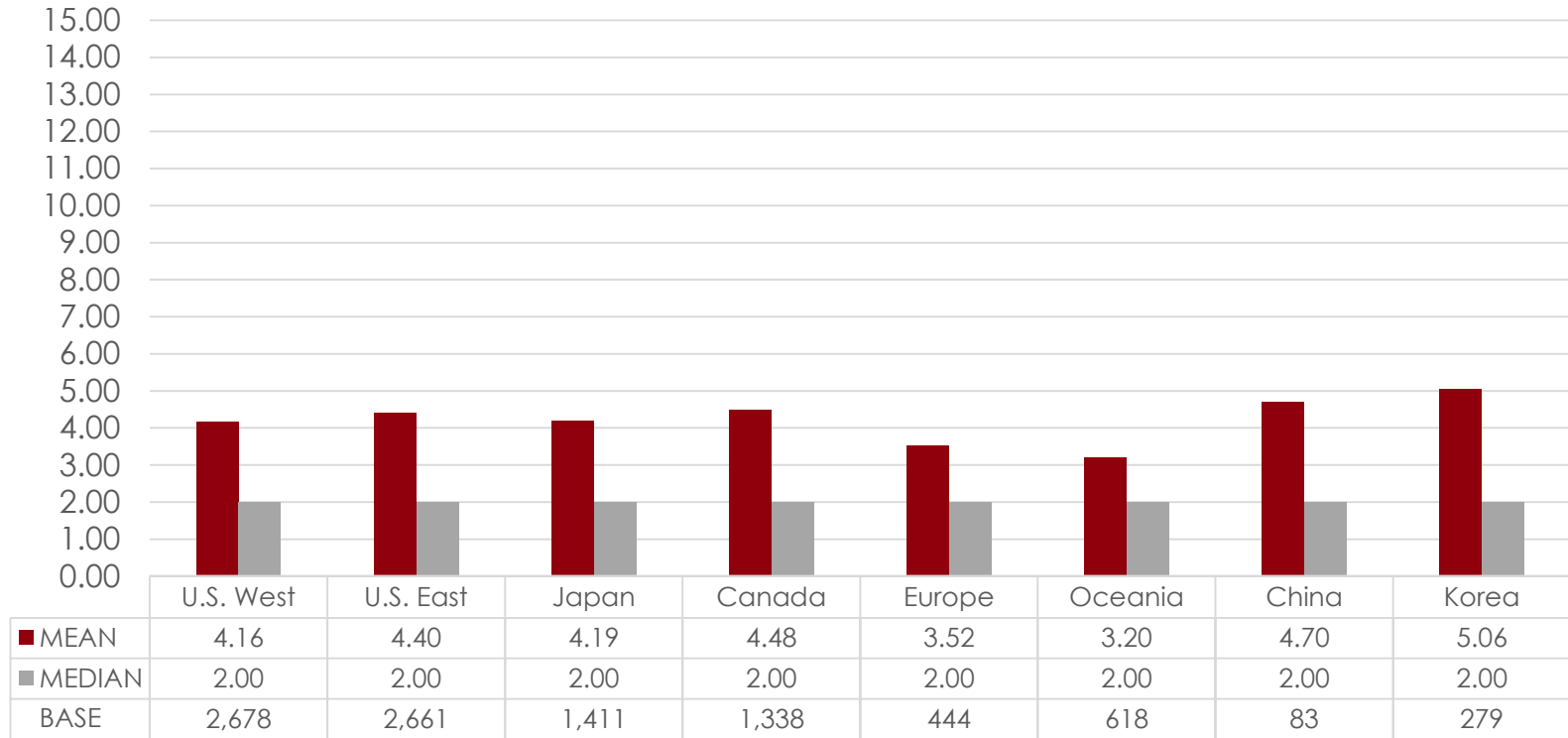
# VISITOR PROFILE – AGE



# VISITOR PROFILE – TRIPS TO HAWAI‘I



# VISITOR PROFILE – TRAVEL PARTY SIZE



## VISITOR PROFILE – Travel Party

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
<b>Spouse</b>	61.2%	61.6%	62.5%	58.7%	52.9%	68.7%	38.2%	67.5%
<b>Other adult family</b>	29.2%	29.0%	19.8%	29.0%	17.1%	20.9%	22.9%	17.2%
<b>Child &lt;18</b>	28.4%	19.7%	14.2%	18.4%	11.6%	15.4%	10.6%	14.7%
<b>Friend/ Associate</b>	15.7%	16.0%	17.1%	19.2%	15.6%	16.9%	22.0%	11.1%
<b>Alone</b>	8.5%	9.4%	6.0%	5.1%	10.1%	5.8%	14.4%	3.3%
<b>Girlfriend/ boyfriend</b>	6.9%	6.4%	5.4%	11.7%	15.1%	4.5%	12.6%	2.3%
<b>Same sex partner</b>	1.3%	1.2%	0.1%	1.1%	2.3%	1.8%	3.8%	0.0%

# 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.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	980	3.13
<b>US East</b>	1664	2.40
<b>Japan</b>	916	3.24
<b>Canada</b>	532	4.25
<b>Europe</b>	300	5.66
<b>Oceania</b>	596	4.01
<b>China</b>	65	12.16
<b>Korea</b>	254	6.15
<b>All MMAs</b>	5,307	1.35

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



# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (KAUA‘I)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai‘i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarizes the number of surveys completed for the island of Kaua‘i.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	511	4.34
<b>US East</b>	635	3.89
<b>Japan</b>	9	32.67
<b>Canada</b>	235	6.39
<b>Europe</b>	109	9.39
<b>Oceania</b>	65	12.16
<b>China</b>	1	98.00
<b>Korea</b>	8	34.65
<b>All MMAs</b>	1,573	2.47

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai'i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarizes the number of surveys completed for the island of Maui.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	905	3.26
<b>US East</b>	963	3.16
<b>Japan</b>	27	18.86
<b>Canada</b>	630	3.90
<b>Europe</b>	213	6.71
<b>Oceania</b>	96	10.00
<b>China</b>	18	23.10
<b>Korea</b>	63	12.35
<b>All MMAs</b>	2,915	1.82

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (ISLAND OF HAWAI'I)

The Visitor Satisfaction and Activity Survey is a survey of visitors who recently completed a trip to Hawai'i. As part of the survey, each respondent is asked a series of questions specific to one of the islands visited during their stay. Respondents have the opportunity to complete up to two island specific surveys. The following tables summarizes the number of surveys completed for the island of Hawai'i.

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>US West</b>	684	3.75
<b>US East</b>	908	3.25
<b>Japan</b>	593	4.02
<b>Canada</b>	305	5.61
<b>Europe</b>	150	8.00
<b>Oceania</b>	72	11.55
<b>China</b>	30	17.89
<b>Korea</b>	39	15.69
<b>All MMAs</b>	2,781	1.86

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