

Visitor Satisfaction Study

Q1 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.

MMA	Completed	Margin of Error \pm	Response Rate
U.S. West	2,363	2.02	19.62%
U.S. East	2,252	2.07	18.79%
Japan	1,426	2.60	48.62%
Canada	1,608	2.44	32.04%
Europe	235	6.39	23.86%
Oceania	333	5.37	20.57%
China	197	6.98	18.58%
Korea	335	5.35	34.22%
All MMAs	8,749	1.05	23.89%

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

METHODOLOGY – OVERALL (cont.)

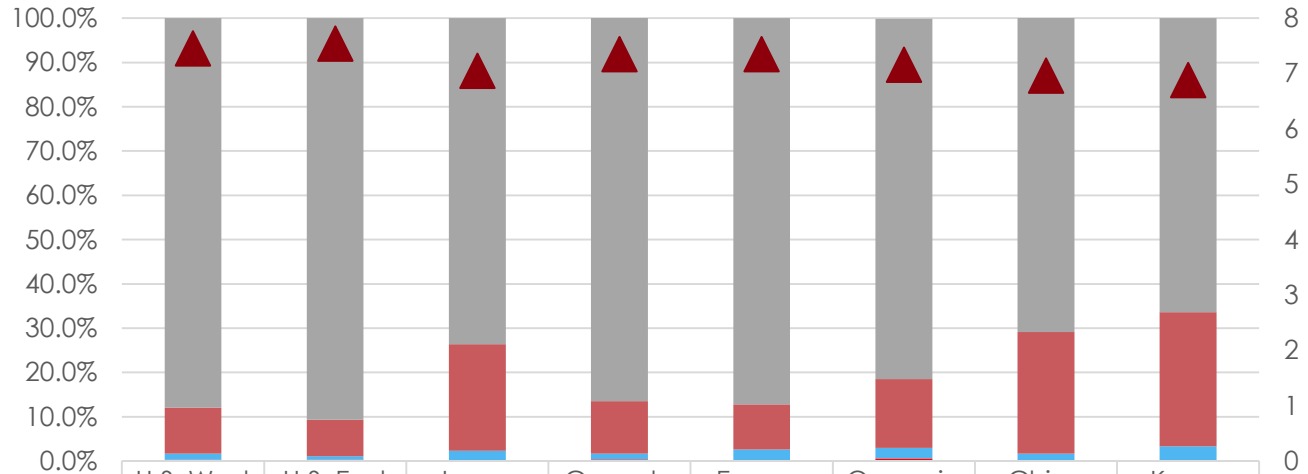
Monthly samples of visitors who stayed for at least two days are drawn from completed Domestic In-Flight and International Departure Survey databases. Selected U.S., Japanese, Canadian, European and Oceania visitors were sent an email invitation with a link to complete the survey online. Data were also 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)	87.9%	90.7%	73.6%	86.6%	87.2%	81.4%	71.0%	66.4%
■ Somewhat satisfied (5-6)	10.4%	8.2%	24.1%	11.8%	10.2%	15.5%	27.4%	30.3%
■ Somewhat dissatisfied (3-4)	1.4%	0.8%	2.3%	1.3%	2.6%	2.4%	1.7%	3.3%
■ Not at all satisfied (1-2)	0.3%	0.3%	0.0%	0.4%	0.0%	0.6%	0.0%	0.0%
BASE	2,363	2,252	1,426	1,608	235	333	197	335
▲ MEAN	7.45	7.54	7.05	7.35	7.35	7.16	6.96	6.88

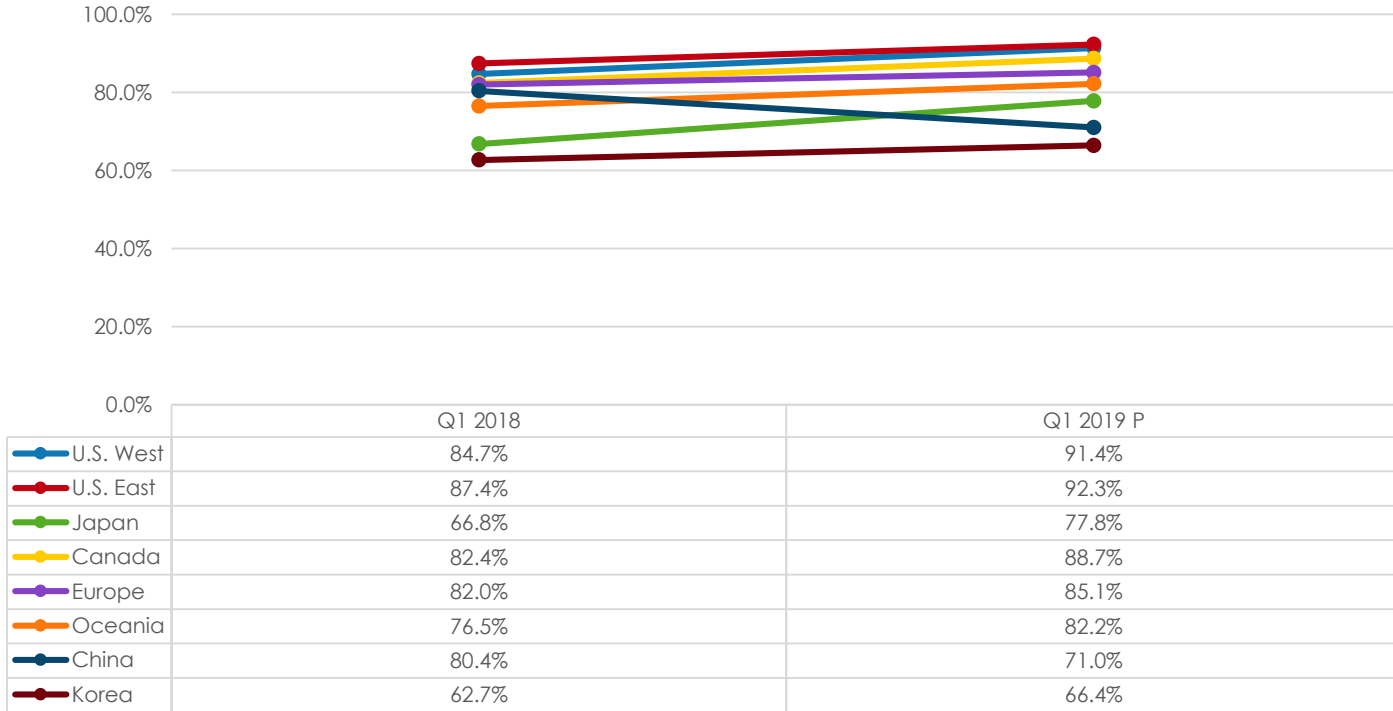
OVERALL SATISFACTION – MOST RECENT VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Satisfaction mean scores are lower among visitors from Asia compared to other MMAs. This is particularly true among visitors from China and Korea, who provide the lowest mean scores overall. Satisfaction scores tended to be higher among U.S., Canadian, and European visitors.
- Those who traveled with groups of three or more tended to give higher overall satisfaction scores.
- Females were more inclined to provide slightly higher satisfaction ratings compared to their male counterparts.
- Those who visited more than one island during their most recent trip provided higher satisfaction scores than those visiting a single island.

OVERALL SATISFACTION – MOST RECENT VISIT

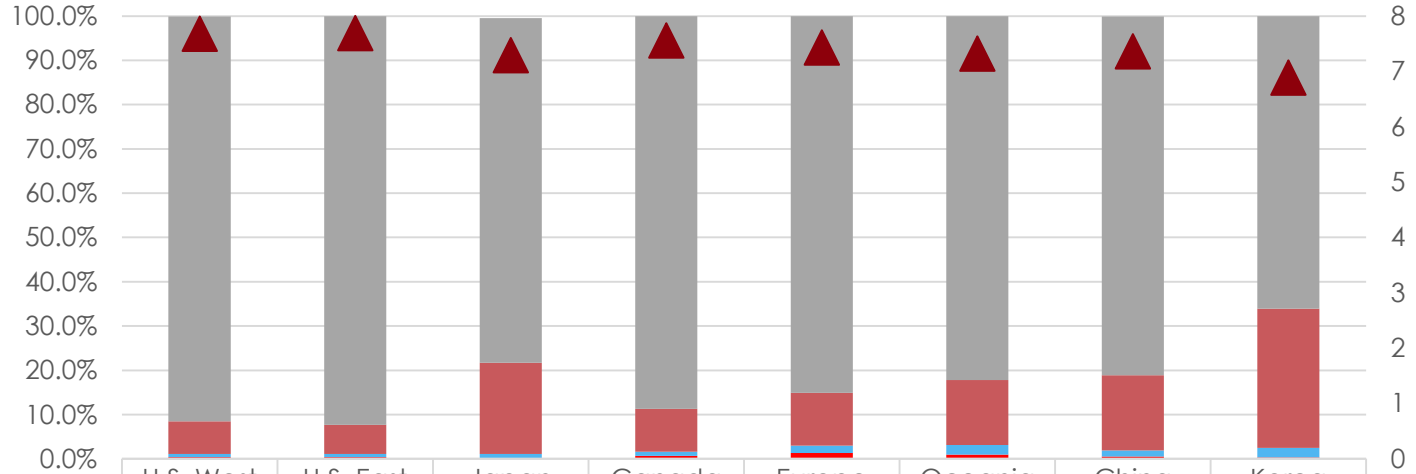
8-pt Rating Scale
8=Extremely Satisfied / 1=Not Satisfied at All



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)	91.4%	92.3%	77.8%	88.7%	85.1%	82.2%	81.0%	66.1%
■ Somewhat likely (5-6)	7.4%	6.6%	20.6%	9.7%	11.9%	14.7%	17.0%	31.4%
■ Somewhat unlikely (3-4)	0.7%	0.7%	1.1%	0.9%	1.7%	2.1%	1.4%	2.2%
■ Very unlikely (1-2)	0.4%	0.4%	0.0%	0.7%	1.3%	1.0%	0.5%	0.3%
BASE	2,263	2,252	1,426	1,608	235	333	197	335
▲ MEAN	7.68	7.69	7.29	7.56	7.43	7.32	7.36	6.89

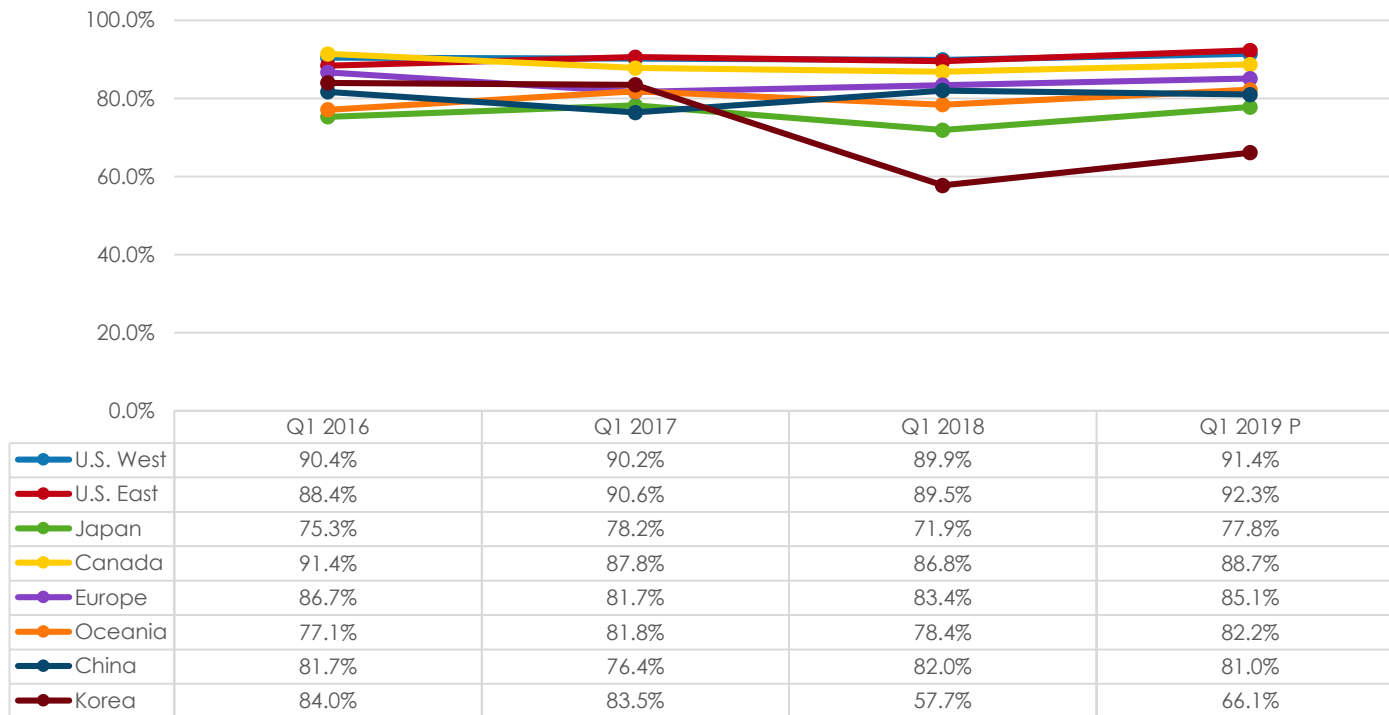
BRAND/DESTINATION – ADVOCACY

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Brand advocacy among Korean visitors continues to show large fluctuations.
- Korean visitors in particular were the least likely to recommend a trip to the islands to others.
- Repeat visitors were more likely to recommend Hawai'i to others than were first-time visitors.
- Those who visited multiple islands during their most recent trip to Hawai'i show a greater likelihood to recommend the destination to others.

BRAND/DESTINATION – ADVOCACY

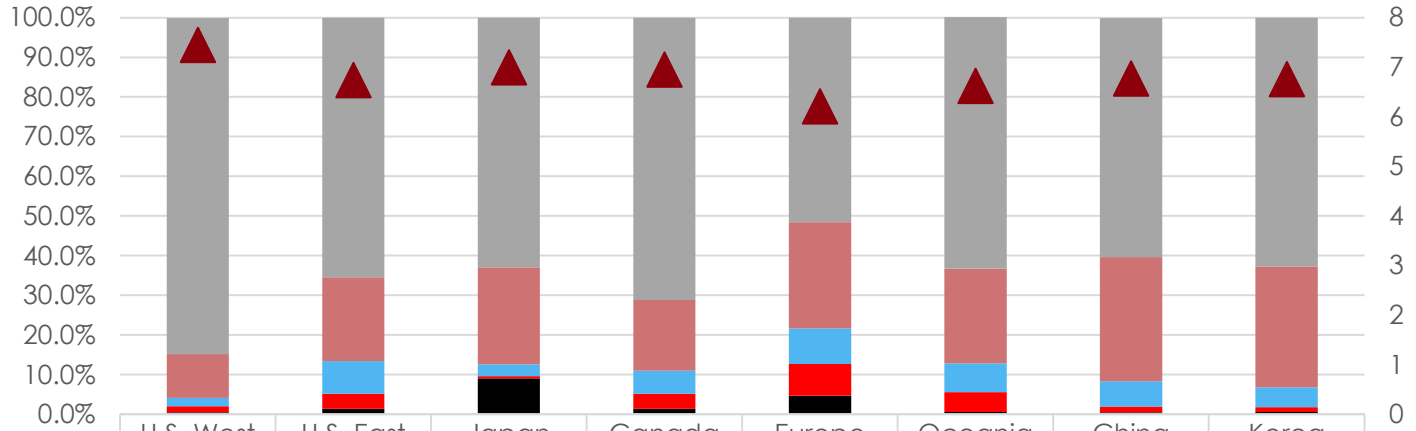
TRACKING – TOP BOX “VERY LIKELY” (7-8)



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)	84.7%	65.5%	63.0%	71.2%	51.6%	63.4%	60.3%	62.7%
■ Somewhat likely (5-6)	11.1%	21.1%	24.4%	17.8%	26.8%	23.9%	31.3%	30.5%
■ Somewhat unlikely (3-4)	2.1%	8.2%	3.0%	5.8%	8.9%	7.2%	6.4%	5.0%
■ Very unlikely (1-2)	1.5%	3.8%	0.6%	3.8%	8.0%	5.0%	1.4%	1.2%
■ Not Sure	0.5%	1.4%	9.0%	1.4%	4.7%	0.6%	0.5%	0.6%
BASE	2,363	2,252	1,426	1,608	235	333	197	335
▲ MEAN	7.45	6.74	7.00	6.95	6.21	6.62	6.77	6.76

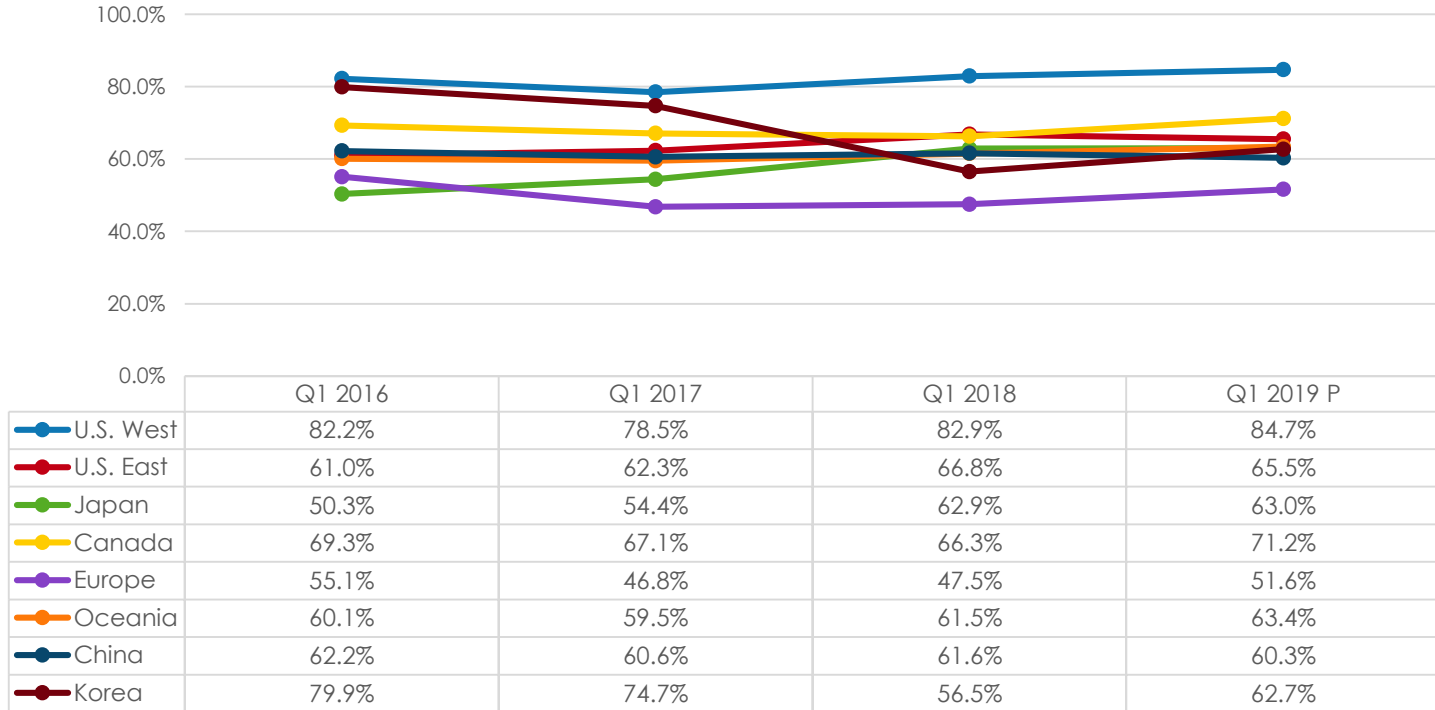
LIKELIHOOD OF RETURN VISIT

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Visitors from the U.S. West region along with Japanese visitors were the most likely to believe a return visit was likely.
- Geography/ distance to Hawai'i impacts these results, as scores are lower for visitors from areas other than the West Coast of the U.S. and to a slightly lesser extent Japan.
- 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 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.
- Younger travelers or those under the age of 35 were the least likely to indicate a return trip was in their plans in the near future.

LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. WEST

Q1 2018	Q1 2019 P
41.9% Too expensive	50.7% Too expensive
36.2% Want to go someplace new	48.0% Want to go someplace new
29.2% Too crowded/ congested/ traffic	30.9% Too crowded/ congested/ traffic
26.1% Too commercialized/ overdeveloped	27.9% Too commercialized/ overdeveloped
18.9% Poor value	20.1% Poor value
17.4% No reason to return/ Nothing new	19.7% Other financial obligations
13.2% Other financial obligations	16.1% Five years is too soon
13.1% Flight is too long	15.2% No reason to return/ Nothing new
11.8% Five years is too soon	14.1% Flight is too long

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q1 2018	Q1 2019 P
51.9% Too expensive	49.4% Too expensive
40.8% Flight is too long	46.6% Want to go someplace new
40.1% Want to go someplace new	44.9% Flight is too long
22.8% Too crowded/ congested/ traffic	21.6% Five years is too soon
16.8% Five years is too soon	15.1% Other financial obligations
16.6% Poor value	11.1% Poor value
16.2% Too commercialized/ overdeveloped	11.1% Too crowded/ congested/ traffic
13.4% Other financial obligations	
11.3% No reason to return/ Nothing new	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q1 2018	Q1 2019 P
36.5% Too expensive	37.6% Too expensive
33.9% Want to go someplace new	34.8% Want to go someplace new
24.5% Other financial obligations	23.6% Five years is too soon
23.9% Five years is too soon	21.9% Other financial obligations
23.8% Flight is too long	18.0% Flight is too long
13.4% Poor value	10.1% No reason to return/ Nothing new

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CANADA

Q1 2018	Q1 2019 P
53.2% Too expensive	58.6% Too expensive
46.5% Want to go someplace new	41.1% Want to go someplace new
35.1% Flight is too long	35.4% Flight is too long
28.3% Poor value	22.8% Poor value
20.4% Too crowded/ congested/ traffic	17.3% Five years is too soon
20.4% Too commercialized/ overdeveloped	16.7% Too commercialized/ overdeveloped
18.6% Five years is too soon	15.4% Too crowded/ congested/ traffic
12.5% No reason to return/ Nothing	10.7% Other financial obligations
10.0% Other financial obligations	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS EUROPE

Q1 2018	Q1 2019 P
70.7% Flight is too long	66.7% Flight is too long
46.6% Too expensive	52.9% Too expensive
45.3% Want to go someplace new	31.3% Want to go someplace new
18.3% Five years is too soon	21.5% Too commercialized/ overdeveloped
12.8% Poor value	15.7% Poor value
11.5% Too commercialized/ overdeveloped	11.7% Five years is too soon
10.5% Other financial obligations	11.7% Other financial obligations

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS OCEANIA

Q1 2018	Q1 2019 P
37.5% Poor value	69.4% Want to go someplace new
36.4% Too commercialized/ overdeveloped	43.3% Too expensive
33.0% Too expensive	30.3% Poor value
31.0% Want to go someplace new	22.1% Five years is too soon
24.8% Too crowded/ congested/ traffic	22.1% Too commercialized/ overdeveloped
20.2% No reason to return/ Nothing new	19.9% No reason to return/ Nothing new
12.8% Flight is too long	15.3% Flight is too long
12.8% Five years is too soon	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS CHINA

Q1 2018	Q1 2019 P
43.0% Want to go someplace new	63.8% Want to go someplace new
28.7% No reason to return/ Nothing new to see	53.6% Flight is too long
21.5% Too commercialized/ overdeveloped	34.8% Five years is too soon
21.5% Five years is too soon	34.8% Poor value
21.5% Poor value	23.2% No reason to return/ Nothing new
21.1% Flight is too long	23.2% Too expensive
14.3% People unfriendly	11.6% Old age/ poor health
	11.6% Too commercialized/ overdeveloped

P= Preliminary Data

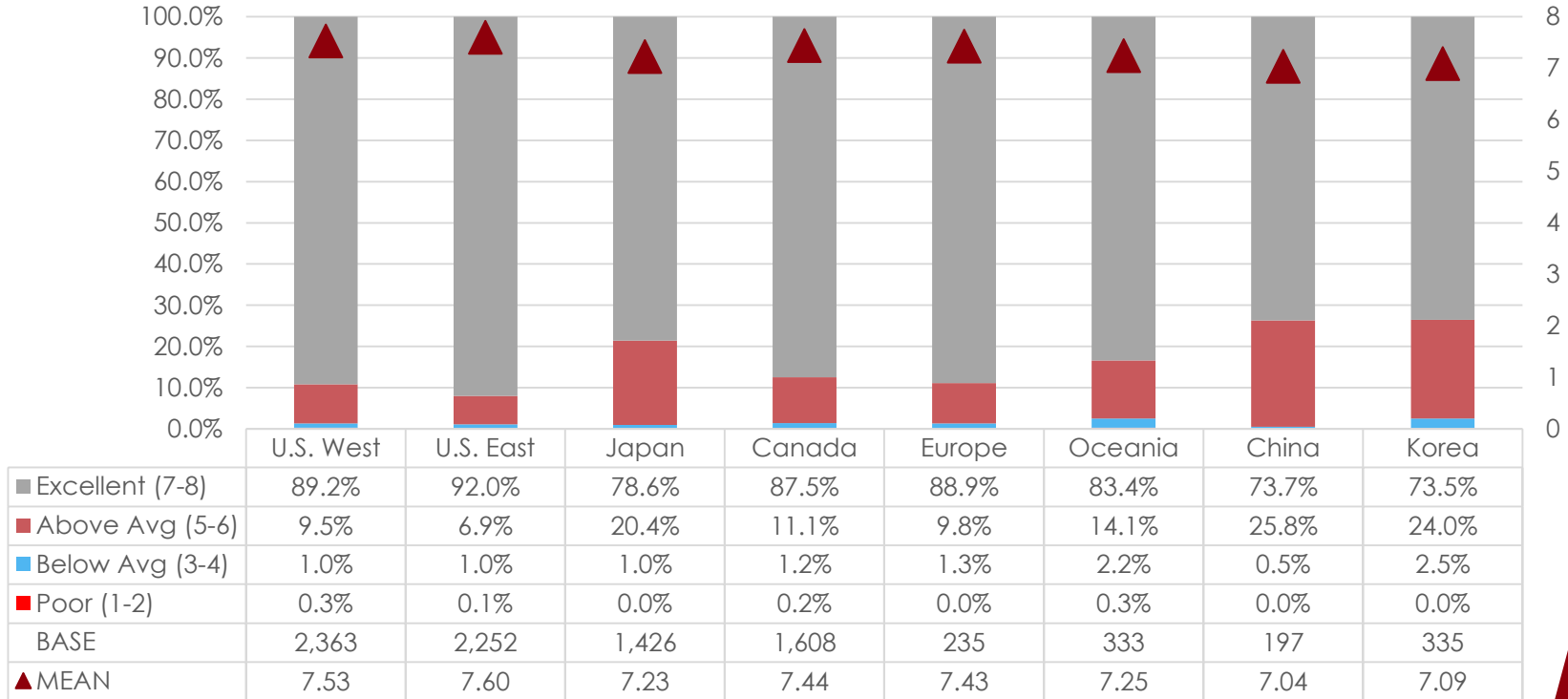
UNLIKELY TO RETURN – TOP REASONS KOREA

Q1 2018	Q1 2019 P
43.0% Too expensive	55.3% Too expensive
33.7% Want to go someplace new	48.9% Poor value
32.1% Poor value	21.9% Five years is too soon
29.6% No reason to return/ Nothing new	18.6% No reason to return/ Nothing new
29.5% Flight is too long	18.6% Unfriendly people
27.2% Five years is too soon	17.7% Want to go someplace new
13.7% Unfriendly people	17.7% Other financial obligations
13.6% Too crowded/ congested/ traffic	16.7% Flight is too long
13.5% Other financial obligations	13.5% Too crowded/ congested/ traffic
11.5% Too commercialized/ overdeveloped	13.5% Poor service

P= Preliminary Data

SATISFACTION – STATE OF HAWAI‘I BY MMA

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



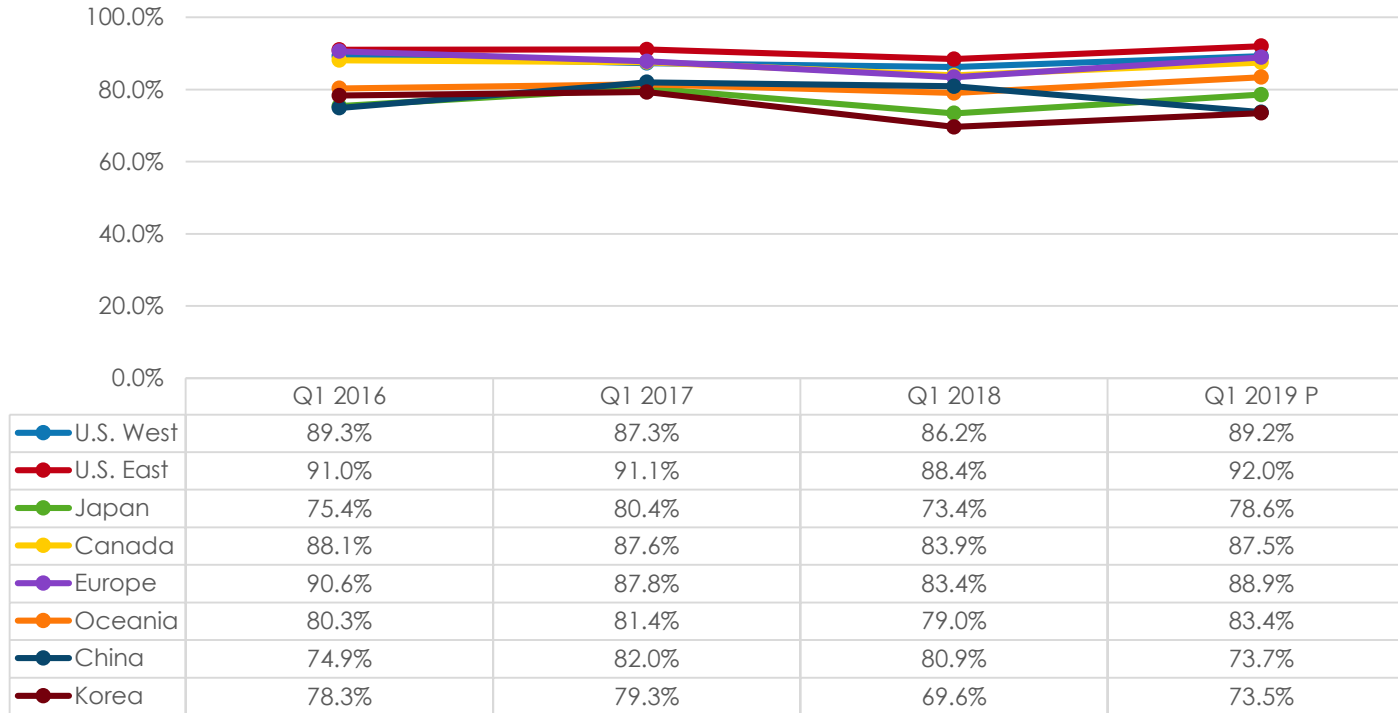
SATISFACTION – STATE OF HAWAI'I BY MMA

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Satisfaction among visitors have risen for each MMA with the exception of China.
- Overall satisfaction tends to be lower among Korean and Chinese visitors in particular.
- Females tend to give higher satisfaction scores than their male counterparts.
- More affluent visitors provided higher satisfaction scores.

SATISFACTION – STATE OF HAWAI‘I BY MMA

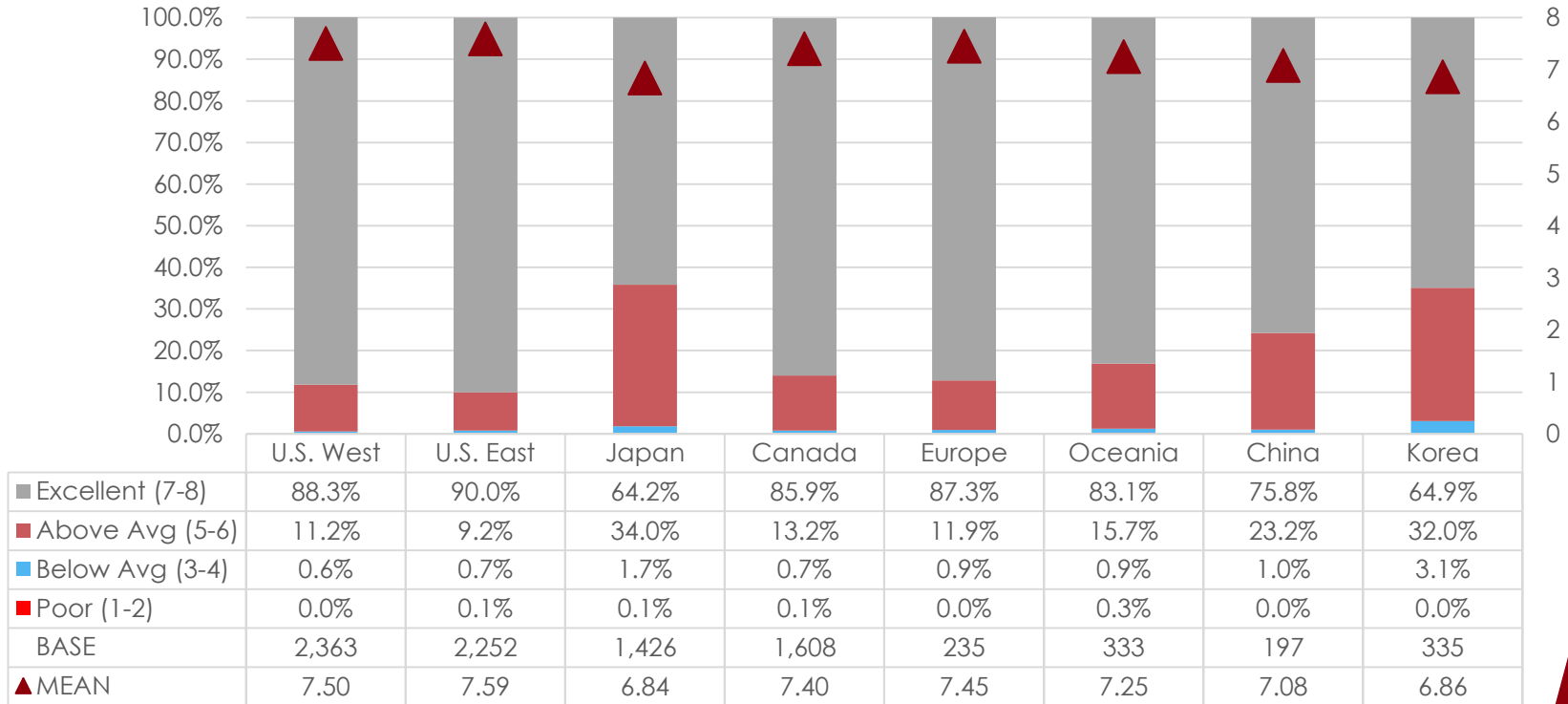
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

OFFERING A VARIETY OF EXPERIENCES

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



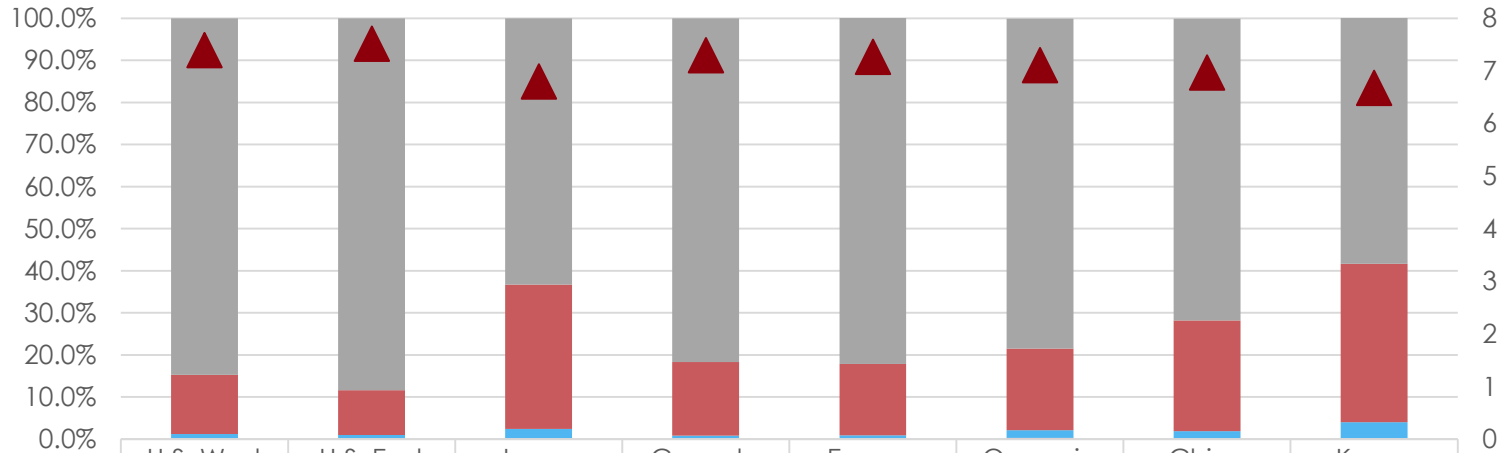
OFFERING A VARIETY OF EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- When segmented by MMA, mean scores are lower among Korean, Chinese and Japanese visitors.
- Female respondents gave higher mean scores than males when asked about this particular aspect of their trip experience.
- Those who visited multiple islands during their trip provided higher scores in this particular area compared to those who visited just a single island.

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)	84.7%	88.4%	63.3%	81.7%	82.2%	78.4%	71.7%	58.4%
■ Above Avg (5-6)	14.1%	10.6%	34.3%	17.5%	17.0%	19.4%	26.3%	37.7%
■ Below Avg (3-4)	1.1%	0.9%	2.4%	0.8%	0.9%	1.8%	1.9%	4.0%
■ Poor (1-2)	0.1%	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
BASE	2,363	2,252	1,426	1,608	235	333	197	335
▲ MEAN	7.40	7.52	6.80	7.30	7.27	7.11	6.97	6.68

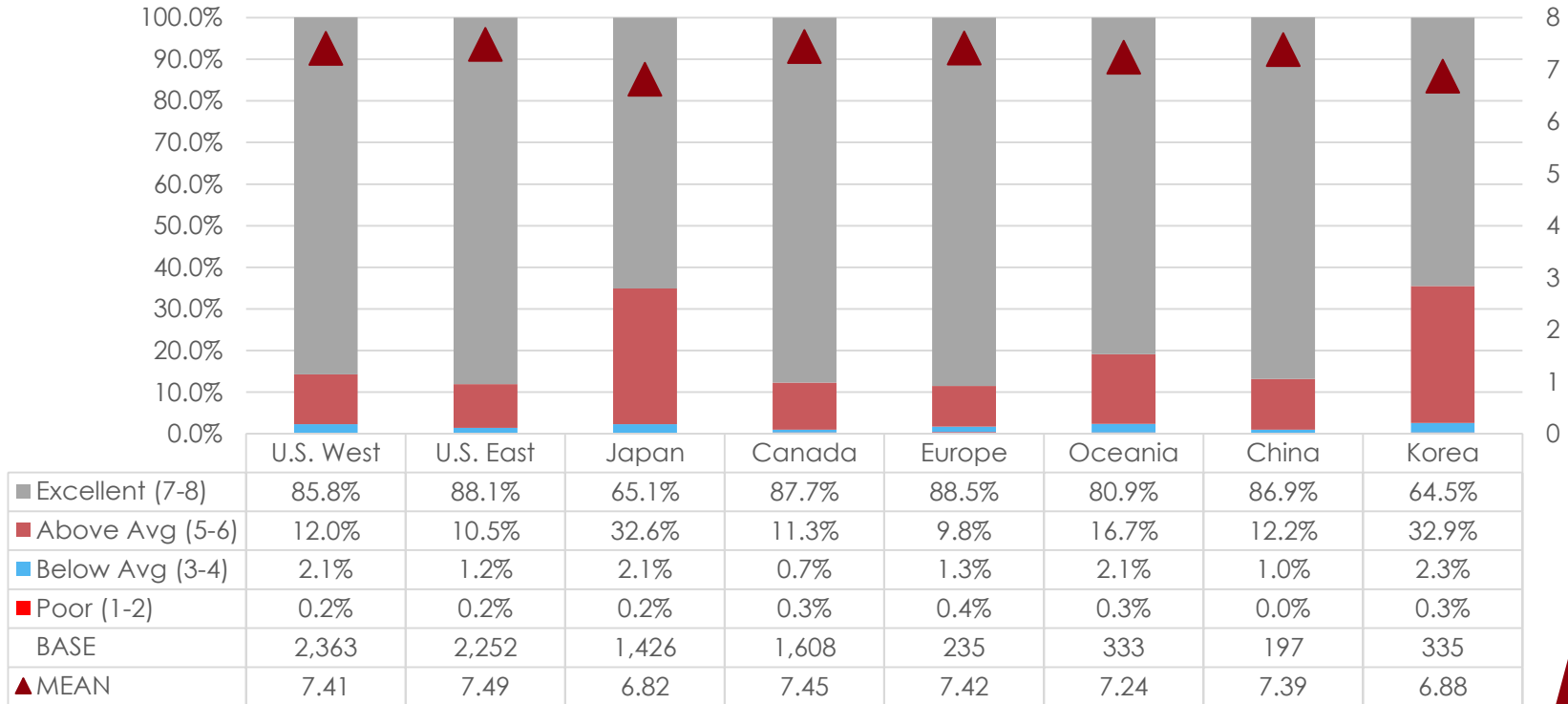
NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Mean scores are lower among visitors from Japan, Korea, and China.
- Seniors as well as families traveling with children reported higher satisfaction scores than younger segments of the sample.
- Respondents who visited multiple islands during their most recent trip provided higher mean scores when asked about unique and different experiences during their trip than those who visited a single island.

BEING A SAFE AND SECURE DESTINATION

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

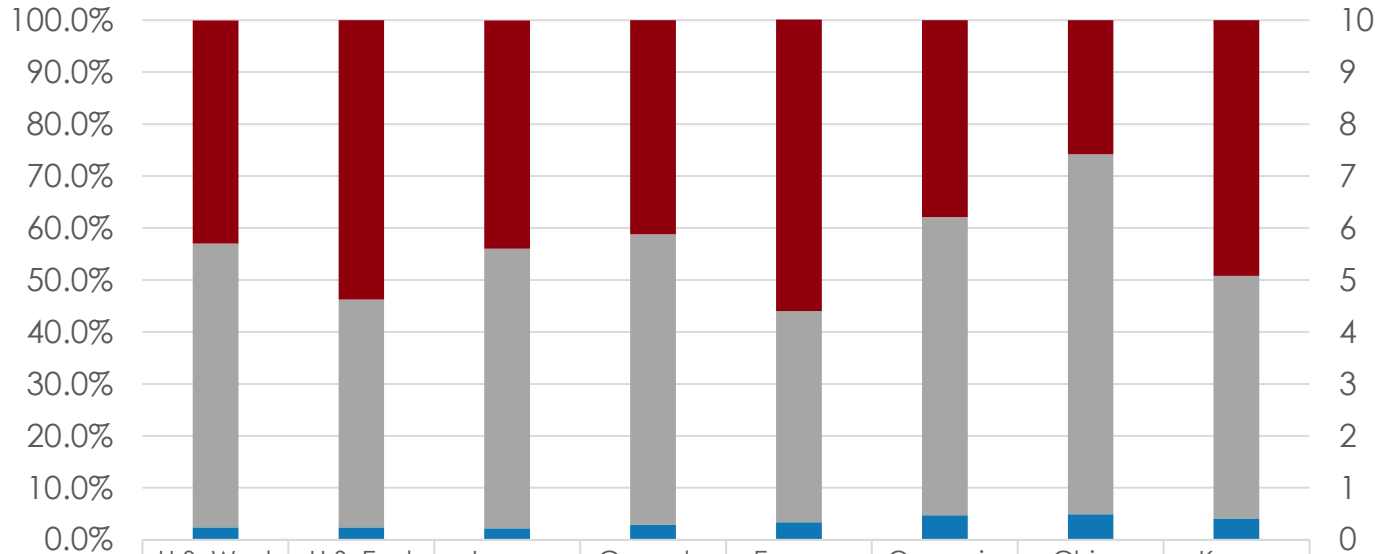


BEING A SAFE AND SECURE DESTINATION

COMPARISON OF MEAN SCORES REVEAL THE FOLLOWING:

- Comparing results by MMA shows Japanese and Korean visitors gave the lowest ratings when asked about their perceived level of safety.
- Seniors and those traveling to the islands with children felt the most safe among the different lifestage segments surveyed.
- Female respondents felt safer; they provided higher mean scores than males.
- Younger respondents (<35) provided lower mean scores when this question was posed to them.

SATISFACTION – HAWAI'I TRIP EXPECTATIONS



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Exceeded expectations	42.9%	53.8%	43.9%	41.2%	56.1%	37.9%	25.8%	49.2%
■ Met expectations	54.6%	43.8%	53.8%	55.9%	40.6%	57.4%	69.3%	46.7%
■ Did NOT meet expectations	2.4%	2.4%	2.2%	2.9%	3.4%	4.7%	4.9%	4.1%
BASE	2,363	2,252	1,426	1,608	235	333	197	335

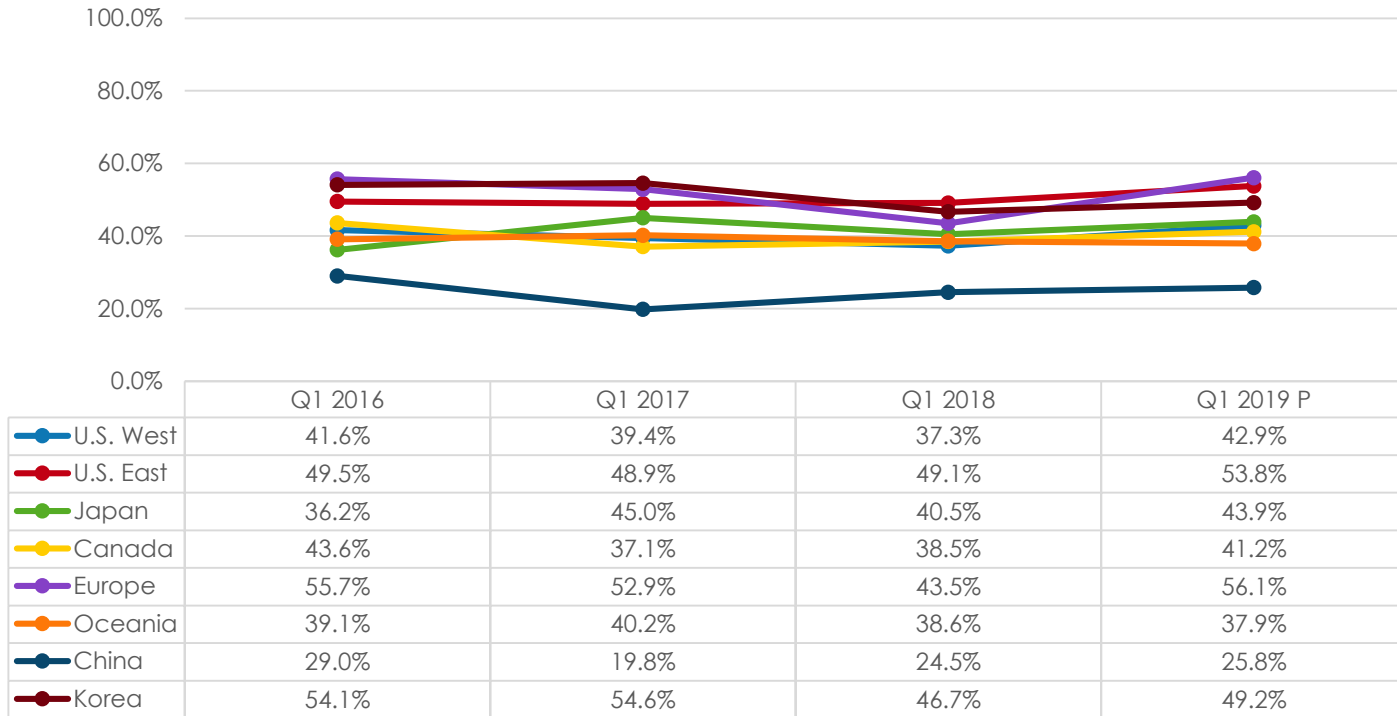
SATISFACTION – HAWAI'I TRIP EXPECTATIONS

COMPARISON OF PERCENTAGES REVEAL THE FOLLOWING:

- Among the lifestage segments surveyed, seniors were the least likely to indicate their trip exceeded their expectations while those here to get married or on their honeymoon were the most likely to report that it did.
- Respondents who were first-time visitors to the state were more likely to feel that the trip exceeded their expectations than repeat visitors.
- Female respondents were more likely than males to feel the trip exceeded their expectations.
- 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
TOTAL	92.2%	93.8%	94.2%	93.5%	88.5%	88.6%	92.8%	97.5%
On own (self-guided)	79.8%	78.9%	64.4%	82.3%	66.8%	51.7%	58.2%	78.7%
Helicopter/ airplane	6.5%	12.5%	2.2%	8.1%	15.8%	6.1%	24.8%	5.4%
Boat/ submarine/ whale	26.3%	38.7%	13.1%	27.5%	38.8%	17.3%	32.5%	15.9%
Visit towns	53.0%	55.1%	34.3%	57.7%	43.8%	30.2%	35.5%	37.8%
Limo/ van/ bus tour	6.5%	14.5%	23.6%	9.1%	18.2%	30.0%	11.8%	12.2%
Scenic views/ natural landmark	57.9%	65.7%	22.2%	64.6%	57.0%	49.7%	50.2%	50.5%
Movie/ TV/ film location	3.8%	5.4%	3.1%	5.0%	5.5%	12.6%	35.1%	15.4%

ACTIVITIES – RECREATION

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	93.1%	93.4%	93.2%	95.7%	88.9%	88.6%	89.9%	97.7%
Beach/ sunbathing	80.2%	80.3%	67.1%	88.0%	77.9%	72.2%	72.5%	75.7%
Bodyboard/ Standup paddle board	13.1%	9.8%	3.6%	18.3%	13.6%	9.8%	0.5%	7.2%
Surfing	5.9%	5.7%	3.1%	10.2%	10.2%	6.6%	3.9%	9.1%
Canoeing/ kayak	7.9%	6.5%	3.0%	6.5%	8.1%	3.0%	1.7%	3.2%
Swim- ocean	60.1%	58.6%	28.7%	72.4%	65.6%	57.4%	29.9%	41.8%
Snorkel	43.6%	38.8%	14.2%	49.6%	42.5%	21.4%	19.1%	40.2%
Windsurf/ Kitesurf	0.2%	0.2%	0.2%	0.2%	1.7%	0.0%	2.0%	0.3%
Jet ski/ Parasail	0.6%	1.0%	2.2%	0.6%	1.3%	1.8%	1.7%	4.3%
Scuba	3.0%	3.3%	1.9%	3.3%	5.1%	0.0%	1.0%	4.0%
Fishing	2.9%	3.9%	0.7%	2.5%	1.3%	0.0%	2.5%	1.3%
Golf	7.4%	8.7%	8.2%	8.0%	3.0%	2.0%	3.9%	4.1%

ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	93.1%	93.4%	93.2%	95.7%	88.9%	88.6%	89.9%	97.7%
Run/ Jog/ Fitness walk	30.0%	27.0%	12.5%	32.4%	18.4%	25.8%	14.1%	11.6%
Spa	9.0%	9.4%	6.7%	5.0%	7.2%	8.7%	3.6%	7.9%
Hiking	47.6%	51.8%	18.3%	49.9%	45.5%	21.8%	31.2%	29.3%
Backpack/ camp	1.5%	1.7%	0.1%	2.7%	2.1%	0.6%	3.2%	3.7%
Agritourism	12.2%	15.5%	13.8%	11.0%	9.4%	7.6%	18.8%	21.4%
Sport event/ tournament	3.2%	3.3%	1.1%	2.6%	0.4%	2.1%	0.5%	1.2%
Park/ botanical garden	33.4%	40.5%	21.5%	37.9%	33.6%	33.5%	35.4%	28.6%
Waterpark	1.0%	1.1%	1.8%	1.9%	0.8%	1.3%	7.7%	2.1%
Mountain tube/ waterfall rappel	2.3%	2.2%	0.6%	1.5%	4.2%	1.3%	1.1%	1.0%
Zip-lining	5.4%	5.0%	0.6%	3.2%	2.1%	3.0%	1.6%	1.5%
Skydiving	0.8%	0.4%	0.7%	0.5%	0.4%	0.3%	6.5%	3.9%
All terrain vehicle (ATV)	2.5%	3.2%	0.8%	2.0%	2.1%	4.7%	7.7%	10.7%
Horseback riding	2.4%	1.6%	4.1%	1.5%	2.6%	0.3%	12.3%	1.8%

ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	95.1%	95.2%	96.3%	95.9%	89.4%	93.5%	92.3%	97.0%
Lunch/ sunset/ dinner/ evening cruise	18.3%	24.7%	11.2%	17.8%	25.6%	20.1%	53.6%	36.4%
Live music/ stage show	28.2%	34.0%	17.5%	29.8%	28.5%	22.8%	17.2%	15.3%
Nightclub/ dancing/ bar/ karaoke	9.6%	9.5%	5.5%	5.9%	9.4%	7.5%	10.2%	6.3%
Fine dining	51.1%	55.8%	41.3%	45.0%	36.7%	33.3%	49.8%	47.3%
Family restaurant	59.0%	55.5%	22.3%	62.9%	46.3%	58.0%	17.7%	37.3%
Fast food	31.8%	32.9%	51.5%	42.7%	45.0%	50.2%	46.0%	54.6%
Food truck	29.4%	30.9%	13.5%	34.1%	31.9%	25.0%	23.1%	51.6%
Café/ coffee house	44.4%	42.9%	50.3%	49.4%	54.5%	60.2%	33.4%	59.8%
Ethnic dining	32.5%	33.2%	10.2%	24.5%	18.7%	15.1%	25.8%	30.3%
Prepared own meal	52.8%	46.2%	19.4%	66.8%	36.1%	27.2%	21.2%	17.8%

ACTIVITIES – SHOPPING

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	93.5%	92.6%	97.0%	94.1%	88.1%	90.7%	92.1%	95.9%
Mall/ department store	39.6%	37.9%	75.7%	54.8%	52.8%	73.6%	66.4%	71.4%
Designer boutique	16.6%	18.7%	19.0%	18.2%	14.9%	22.3%	9.1%	5.5%
Hotel/ resort store	29.6%	36.3%	34.5%	26.6%	24.7%	30.8%	29.1%	25.1%
Swap meet/ flea market	15.5%	14.7%	3.4%	17.2%	7.6%	8.5%	7.4%	4.2%
Discount/ outlet store	14.0%	14.0%	20.4%	22.6%	14.9%	36.4%	38.7%	60.9%
Supermarket	64.9%	60.5%	66.2%	71.0%	63.0%	52.1%	66.5%	58.1%
Farmer's market	38.8%	31.7%	18.0%	43.2%	30.3%	16.4%	15.0%	10.9%
Convenience store	43.9%	46.6%	38.2%	50.2%	33.6%	59.8%	51.7%	46.6%
Duty free store	2.6%	3.2%	31.9%	6.4%	6.4%	9.7%	54.1%	42.0%
Local shop/ artisan	62.7%	66.7%	11.0%	61.9%	57.9%	46.0%	25.5%	18.7%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS

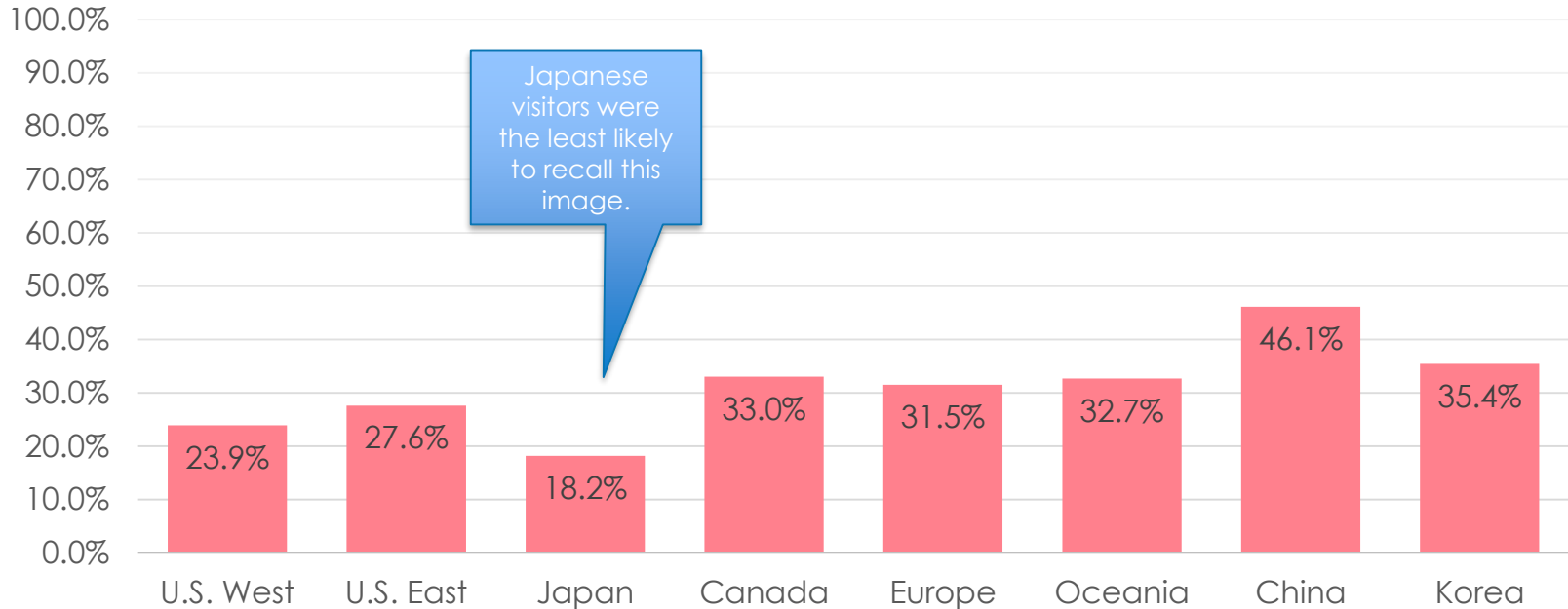
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	66.4%	72.7%	55.3%	66.8%	65.1%	71.6%	78.8%	69.1%
Historic military site	15.3%	24.4%	17.5%	17.1%	25.0%	39.0%	45.8%	20.4%
Other historical site	26.0%	29.2%	17.1%	27.2%	30.6%	27.6%	24.8%	32.0%
Museum/ art gallery	19.5%	17.8%	5.9%	17.0%	16.2%	16.1%	14.5%	8.4%
Luau/ Polynesian show/ hula show	24.4%	37.3%	12.2%	30.4%	28.1%	28.1%	19.6%	22.7%
Lesson- ex. ukulele, hula, canoe, lei making	5.6%	7.4%	6.6%	6.9%	8.1%	4.8%	8.4%	4.7%
Play/ concert/ theatre	5.6%	4.9%	3.6%	4.8%	4.3%	2.6%	1.9%	4.2%
Art/ craft fair	15.1%	13.8%	3.5%	14.6%	3.8%	6.8%	11.3%	4.8%
Festival event	4.4%	4.6%	2.6%	4.4%	3.4%	2.7%	3.6%	0.6%

ACTIVITIES – TRANSPORTATION

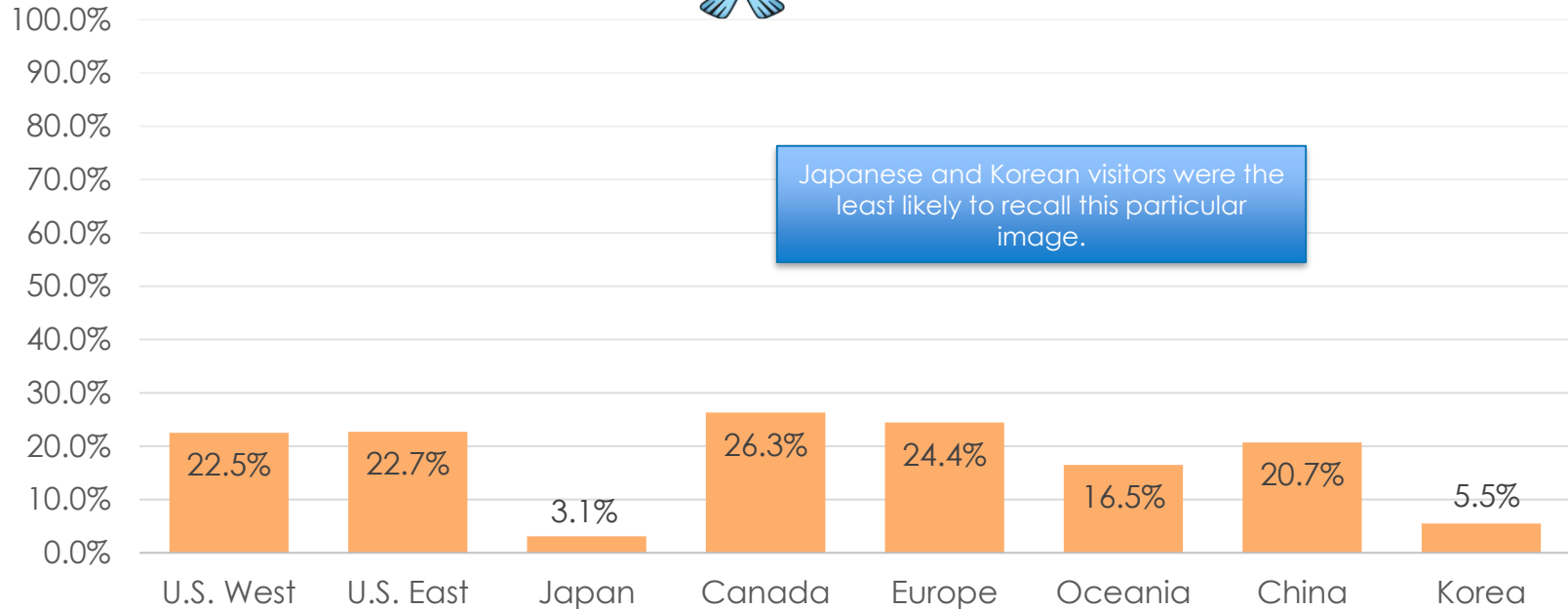
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
TOTAL	88.4%	90.5%	94.6%	93.3%	86.0%	91.4%	85.9%	92.3%
Airport shuttle	14.8%	15.8%	23.6%	20.7%	22.5%	43.5%	10.7%	15.3%
Trolley	2.2%	3.4%	39.6%	3.9%	5.9%	21.1%	6.7%	24.1%
Public bus	4.0%	4.2%	13.0%	13.7%	15.3%	28.8%	18.4%	9.6%
Tour bus/ tour van	7.6%	16.0%	30.2%	11.0%	20.4%	30.9%	23.4%	26.8%
Taxi/ limo	6.9%	11.3%	25.3%	14.1%	22.5%	31.4%	21.3%	20.1%
Rental car	74.8%	73.8%	34.5%	77.5%	56.2%	33.4%	48.3%	55.9%
Ride share	13.8%	15.4%	4.8%	12.9%	15.3%	20.9%	16.9%	9.2%
Bicycle rental	2.6%	2.5%	2.2%	3.4%	2.1%	1.8%	1.9%	1.5%

SECTION – SIGNAGE

HVCB POST-ARRIVAL EXPERIENCE LOGO



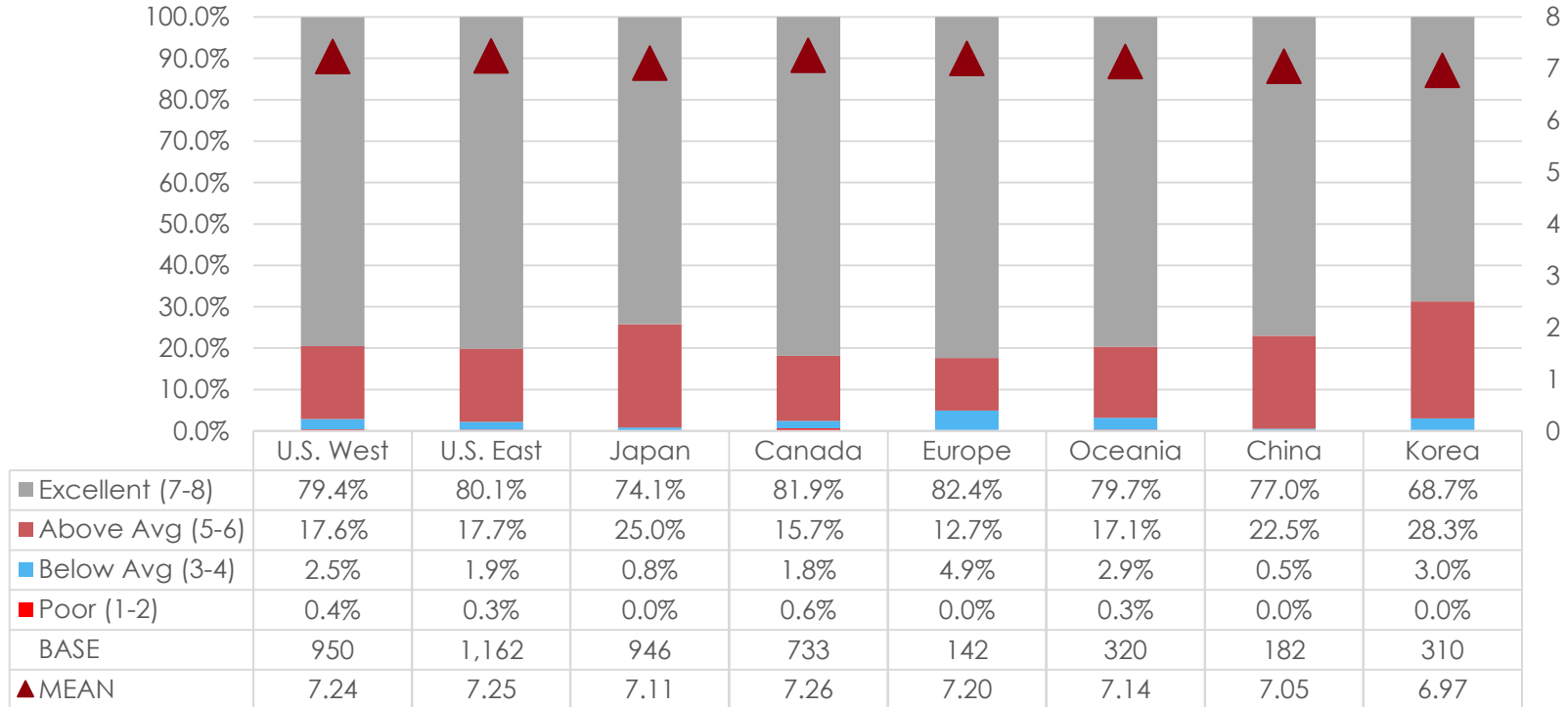
OCEAN SAFETY LOGO



SECTION – O'AHU

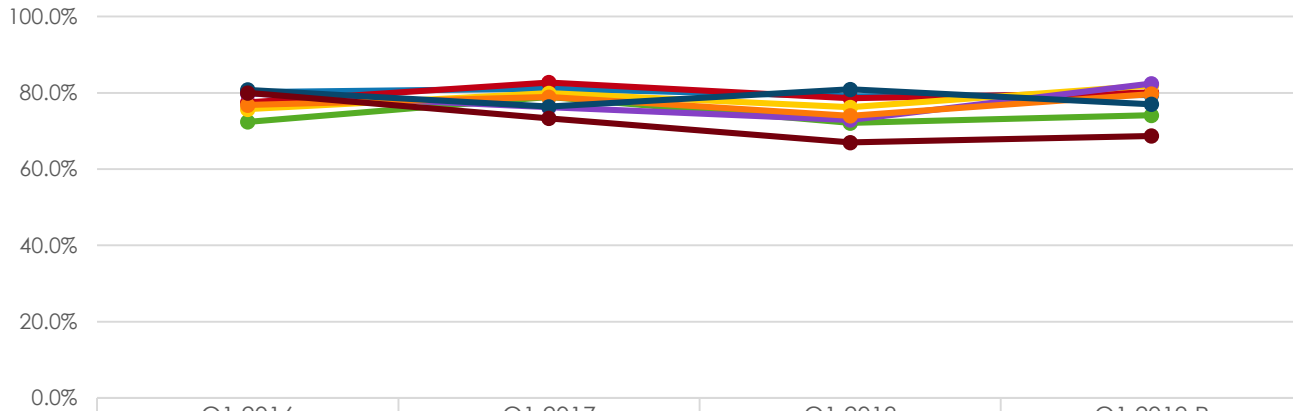
SATISFACTION – O‘AHU

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



SATISFACTION – O‘AHU

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

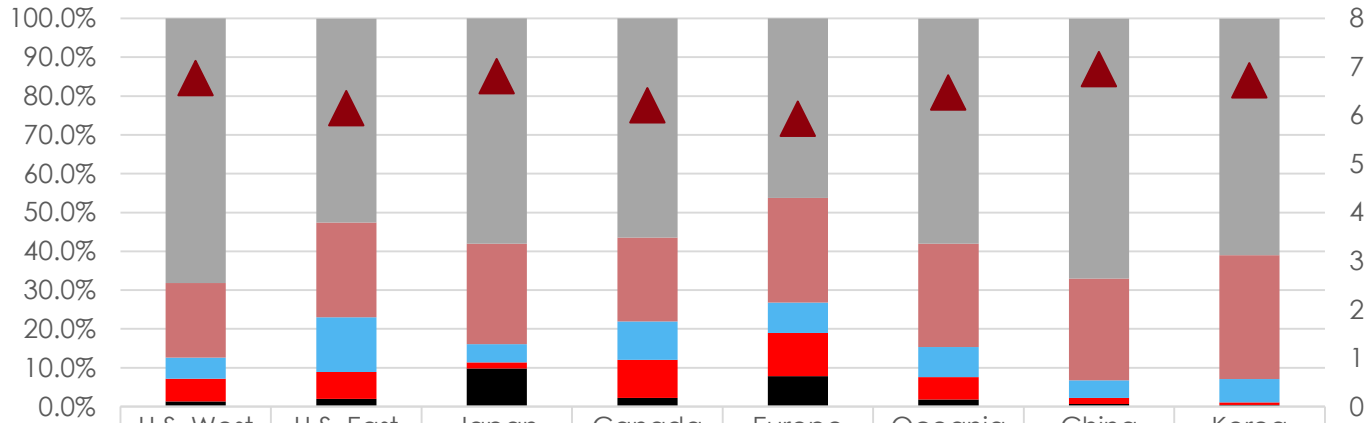


	Q1 2016	Q1 2017	Q1 2018	Q1 2019 P
U.S. West	80.2%	81.1%	79.1%	79.4%
U.S. East	77.5%	82.7%	78.6%	80.1%
Japan	72.4%	78.9%	72.1%	74.1%
Canada	75.7%	79.9%	76.2%	81.9%
Europe	79.8%	76.2%	72.9%	82.4%
Oceania	76.8%	78.9%	74.0%	79.7%
China	80.8%	76.4%	80.9%	77.0%
Korea	80.0%	73.3%	67.0%	68.7%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT – O‘AHU

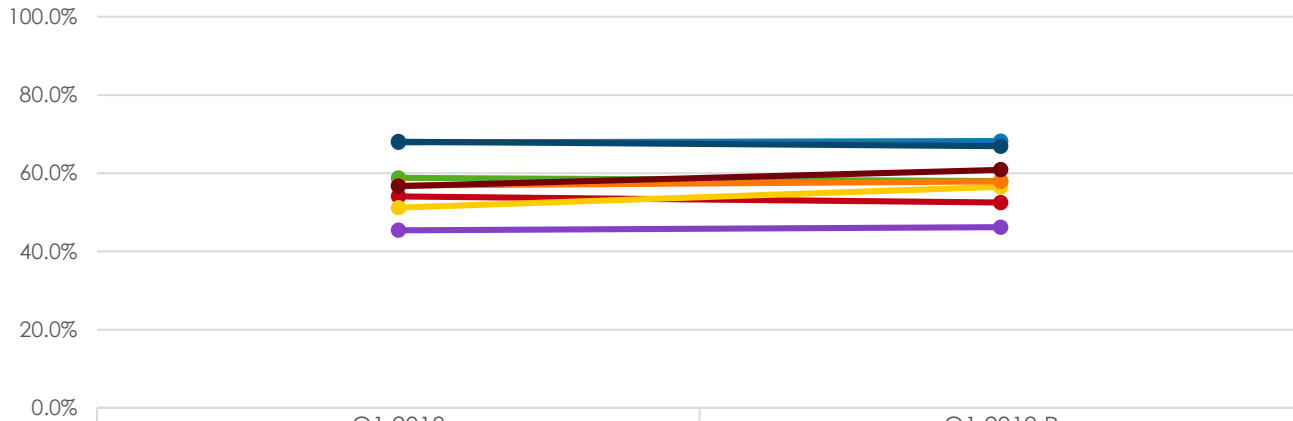
8-pt Rating Scale
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Very likely (7-8)	68.2%	52.5%	58.0%	56.5%	46.2%	57.9%	66.9%	60.9%
■ Somewhat likely (5-6)	19.2%	24.4%	25.9%	21.6%	27.0%	26.7%	26.2%	31.9%
■ Somewhat unlikely (3-4)	5.4%	14.1%	4.7%	9.9%	7.8%	7.7%	4.6%	6.0%
■ Very unlikely (1-2)	5.9%	6.9%	1.6%	9.8%	11.2%	5.8%	1.5%	0.7%
■ Not sure	1.3%	2.0%	9.8%	2.2%	7.8%	1.8%	0.7%	0.4%
BASE	835	882	898	614	89	284	128	260
▲ MEAN	6.77	6.15	6.81	6.21	5.93	6.47	6.95	6.72

LIKELIHOOD OF RETURN VISIT – O‘AHU

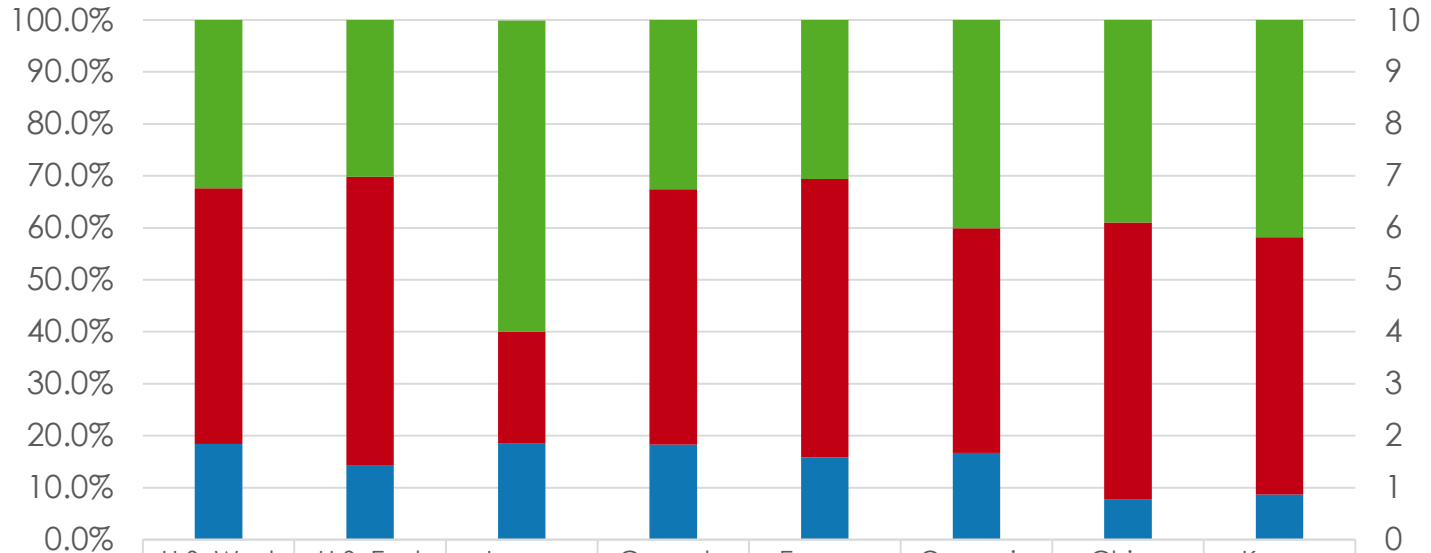
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019 P
U.S. West	67.9%	68.2%
U.S. East	54.1%	52.5%
Japan	58.8%	58.0%
Canada	51.2%	56.5%
Europe	45.4%	46.2%
Oceania	56.9%	57.9%
China	68.1%	66.9%
Korea	56.7%	60.9%

P= Preliminary Data

AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	32.4%	30.2%	59.9%	32.6%	30.6%	40.1%	39.0%	41.8%
No Prior Awareness	49.2%	55.6%	21.5%	49.1%	53.6%	43.2%	53.3%	49.5%
Unsure	18.4%	14.2%	18.5%	18.3%	15.8%	16.7%	7.7%	8.7%
BASE	851	891	904	624	95	290	129	260

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Atlantis Submarine & Cruises	2.1%	3.0%	5.0%	2.9%	5.7%	4.1%	20.1%	4.8%
Bernice P. Bishop Museum	3.9%	3.3%	1.5%	3.7%	1.4%	2.2%	1.8%	1.7%
Byodo-In Temple	6.0%	6.0%	1.4%	9.6%	9.9%	5.0%	3.4%	0.4%
Chinatown & Honolulu Art District	11.1%	9.3%	11.7%	14.7%	14.8%	9.7%	23.1%	8.6%
Diamond Head State Monument	24.5%	29.8%	18.2%	40.1%	32.4%	34.3%	16.5%	41.6%
Dole Plantation	23.8%	27.4%	13.4%	31.7%	19.7%	20.3%	26.8%	43.5%
Haleiwa	17.8%	19.9%	20.1%	26.0%	18.4%	9.6%	8.6%	16.2%
Hanauma Bay Nature Reserve	16.4%	16.4%	18.1%	30.2%	19.7%	13.9%	35.7%	35.9%
Harold L. Lyon Arboretum	1.1%	1.0%	2.7%	1.6%	1.4%	0.3%	3.4%	3.8%
Hawaii State Art Museum or Honolulu Museum of Art	2.7%	2.3%	4.1%	2.9%	3.5%	5.8%	6.2%	3.2%
Hawaiian Mission Houses, Historic Site and Archive	1.0%	1.2%	1.0%	1.5%	0.0%	2.2%	1.6%	1.0%
Hawaii’s Plantation Village	1.5%	1.5%	1.4%	1.8%	2.1%	3.4%	6.1%	1.8%
Honolulu Zoo	5.9%	5.3%	8.8%	10.5%	4.2%	9.5%	6.1%	7.3%

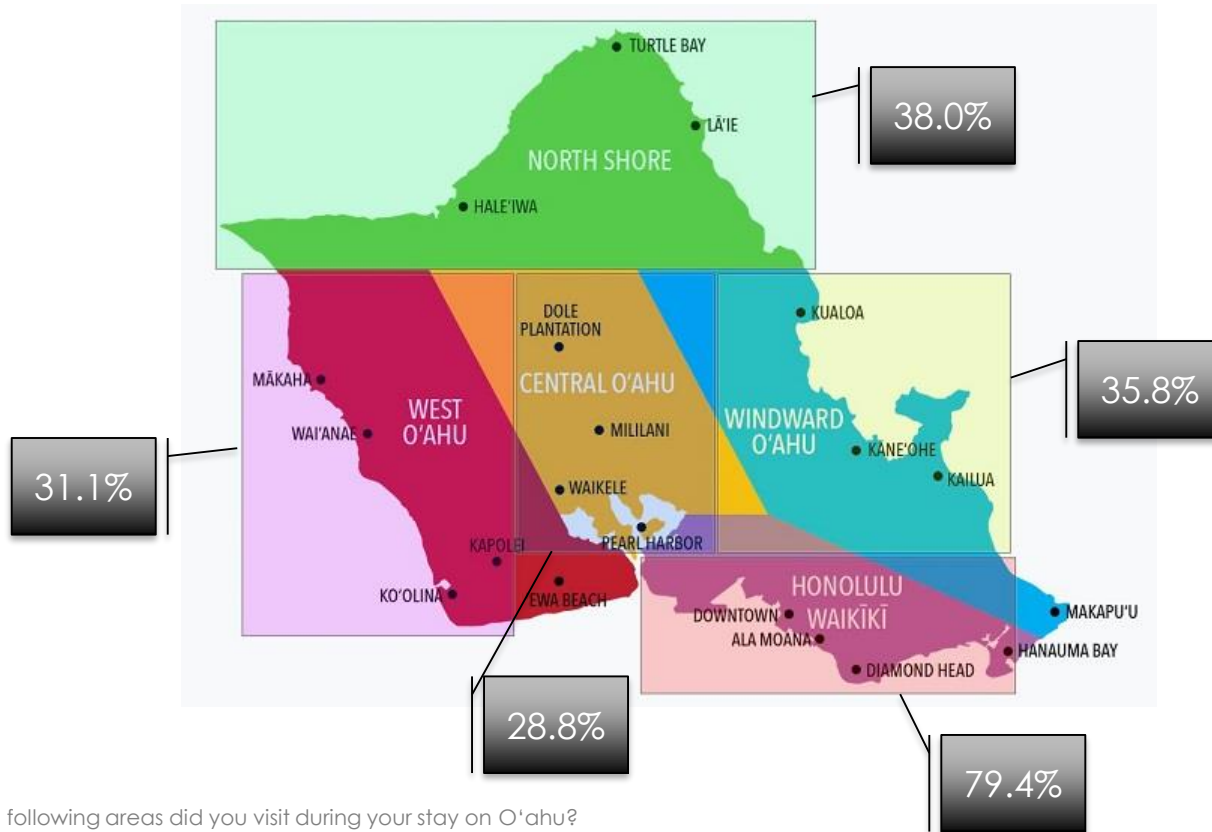
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Ho‘omaluhia Botanical Garden	3.6%	3.4%	3.8%	4.7%	6.3%	1.9%	1.8%	5.1%
Iolani Palace State Monument	6.4%	7.0%	13.9%	7.6%	7.1%	6.0%	14.5%	13.9%
Kaiwi State Scenic Shoreline/ Makapuu Trail	4.9%	6.8%	4.4%	9.9%	4.2%	2.9%	4.8%	1.9%
Kakaako Street Art	0.8%	1.3%	11.2%	1.9%	2.1%	1.0%	3.8%	1.7%
Koko Head Crater Trail	6.4%	6.1%	1.4%	9.4%	12.7%	6.0%	4.4%	3.0%
Kualoa Private Nature Reserve	7.1%	7.2%	5.6%	11.7%	9.1%	10.4%	16.7%	13.0%
Lanikai or Kailua Beach	24.0%	21.6%	19.6%	32.8%	21.8%	11.3%	12.5%	22.9%
Manoa Falls & Trail	8.4%	10.8%	3.2%	15.8%	19.0%	6.1%	4.5%	6.1%
National Memorial Cemetery of the Pacific	8.6%	14.0%	1.7%	9.3%	6.4%	9.4%	10.0%	5.0%
Nuuanu Pali Lookout	8.7%	10.9%	7.1%	12.2%	10.5%	6.6%	24.0%	8.7%
North Shore Beaches	40.4%	39.0%	17.4%	49.7%	37.4%	34.1%	19.4%	32.8%

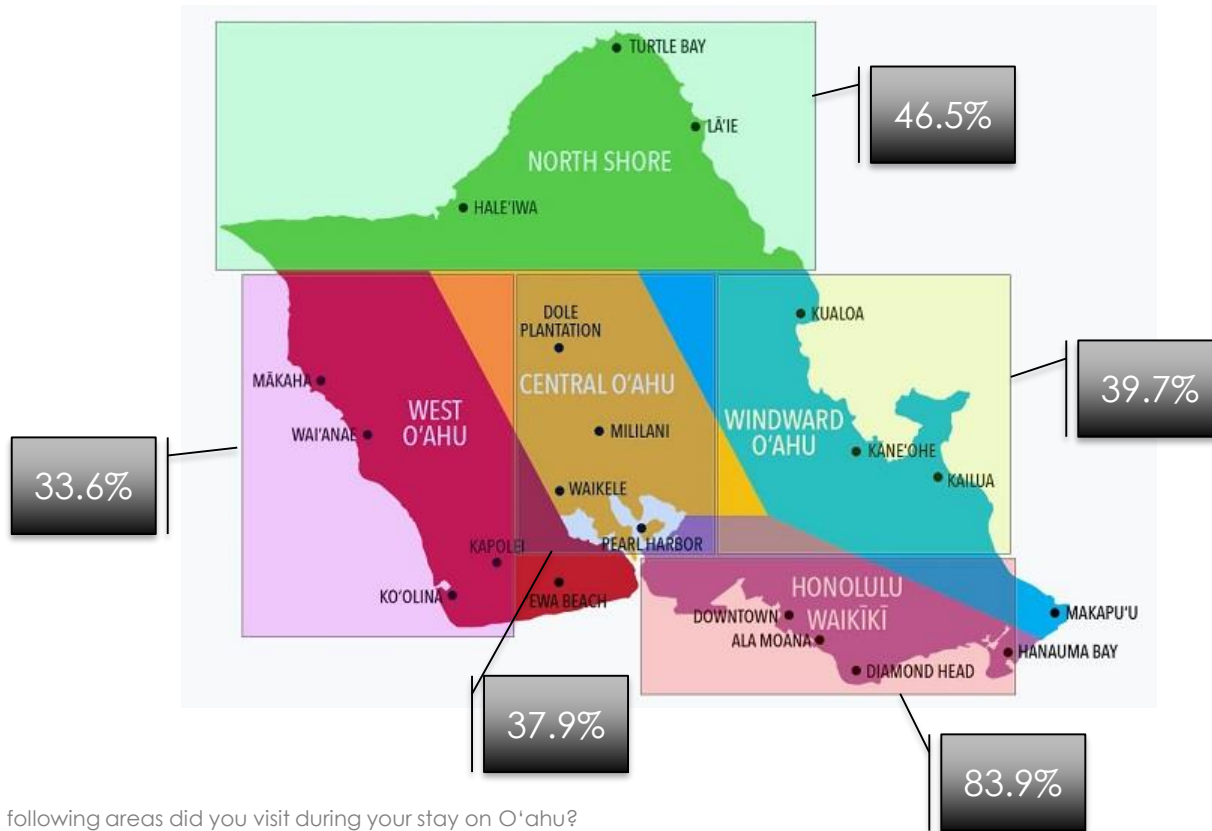
ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Pearl Harbor	24.8%	37.7%	11.8%	31.9%	35.8%	37.6%	36.4%	18.1%
Polynesian Cultural Center	15.3%	13.2%	2.6%	18.9%	12.0%	11.3%	23.2%	17.1%
Queen Emma’s Summer Palace	2.6%	1.9%	1.3%	2.5%	2.8%	2.1%	4.9%	1.4%
Sea Life Park Hawaii	3.5%	3.6%	2.8%	4.8%	2.1%	3.5%	2.9%	1.7%
Waikiki Aquarium	5.5%	4.1%	6.8%	7.4%	5.6%	3.2%	4.9%	2.4%
Waimanalo Beach Park	8.0%	8.9%	2.0%	16.4%	12.7%	7.1%	4.4%	8.3%
Waimea Valley	13.4%	14.0%	1.8%	18.8%	15.5%	10.9%	1.7%	4.6%

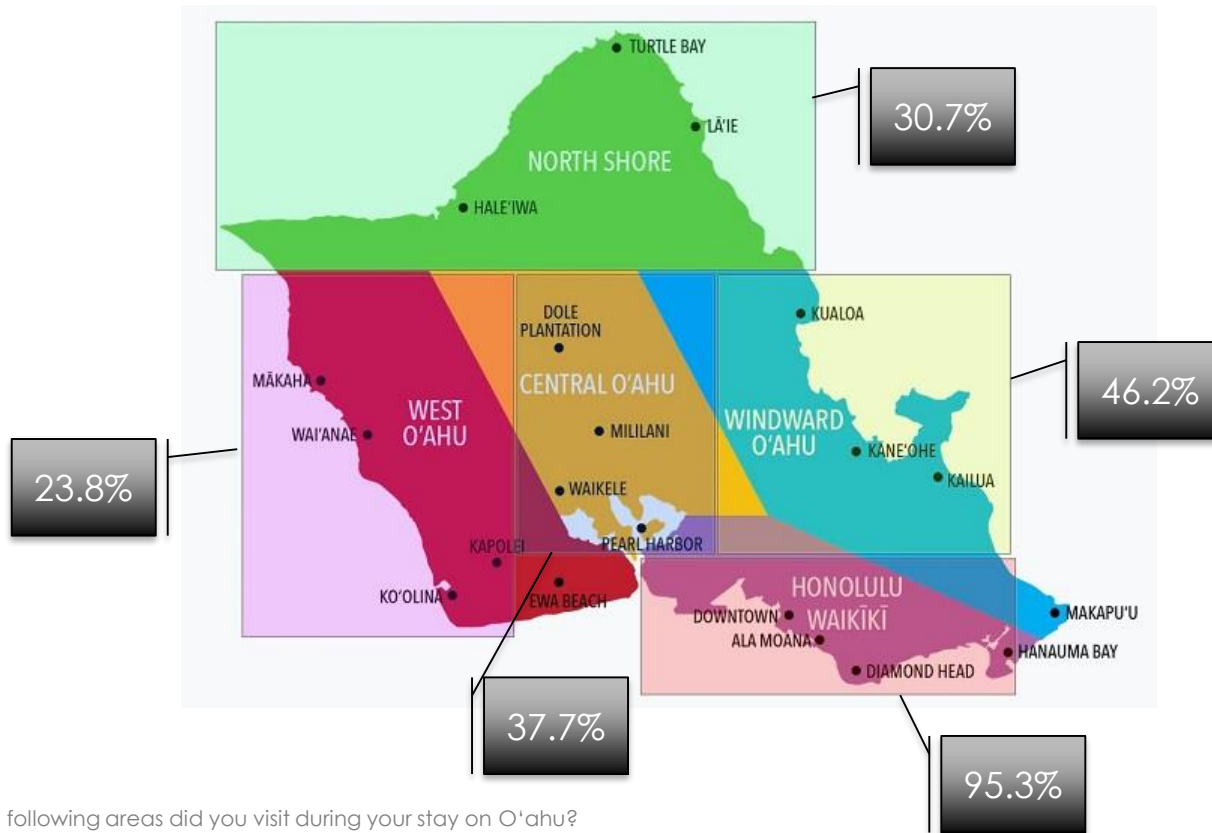
AREAS VISITED U.S. WEST



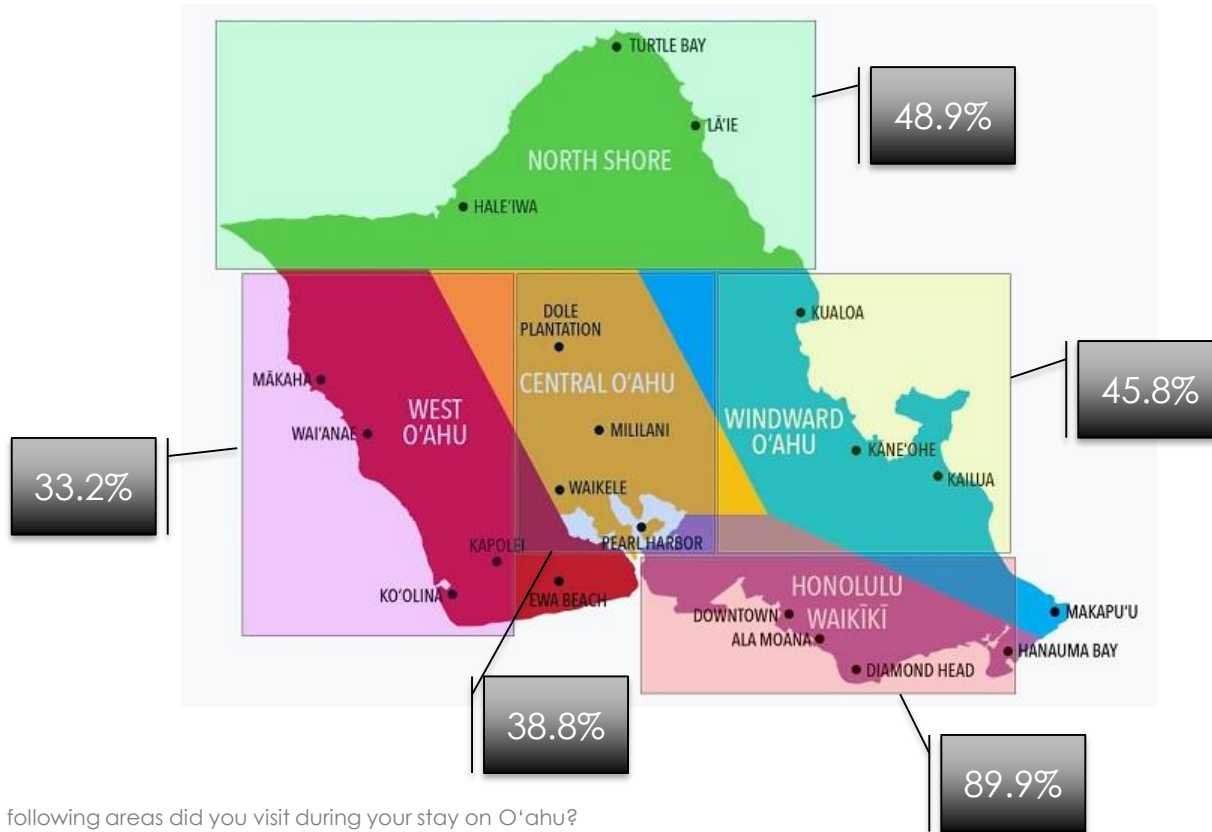
AREAS VISITED U.S. EAST



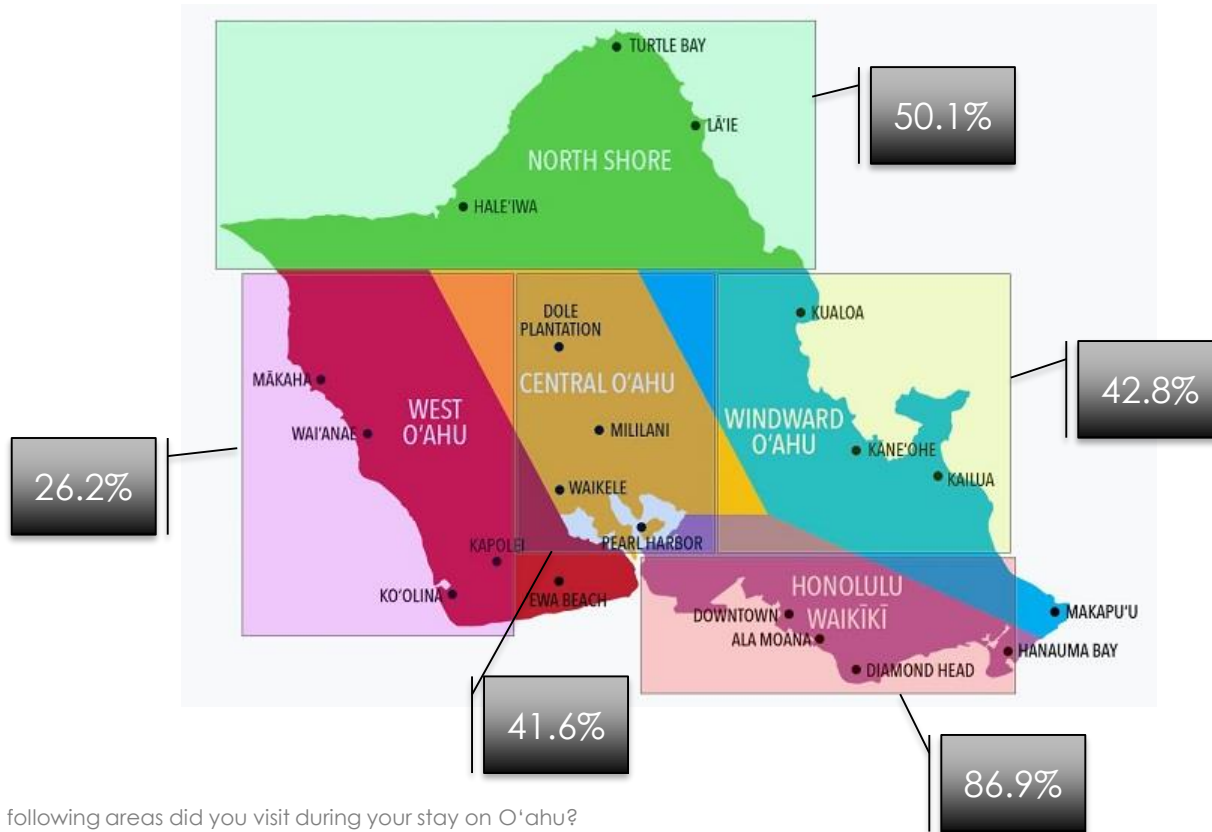
AREAS VISITED JAPAN



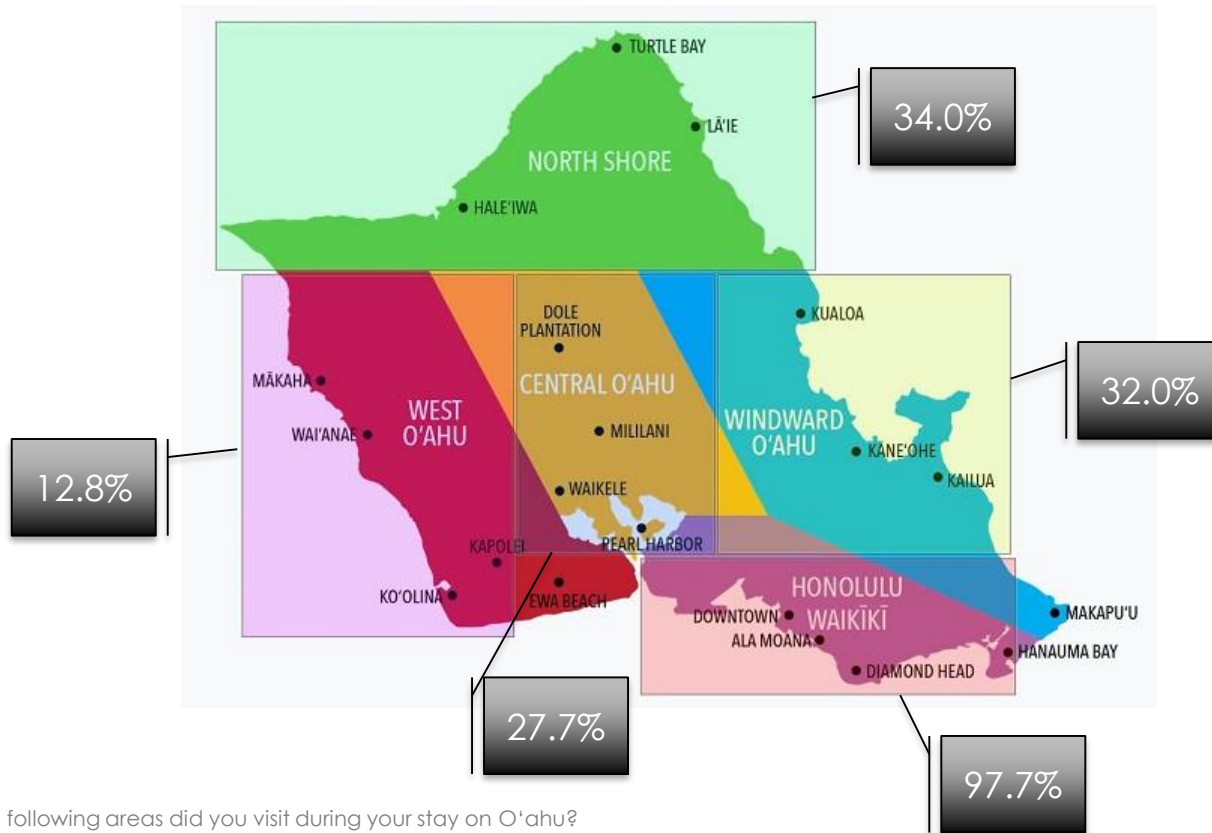
AREAS VISITED CANADA



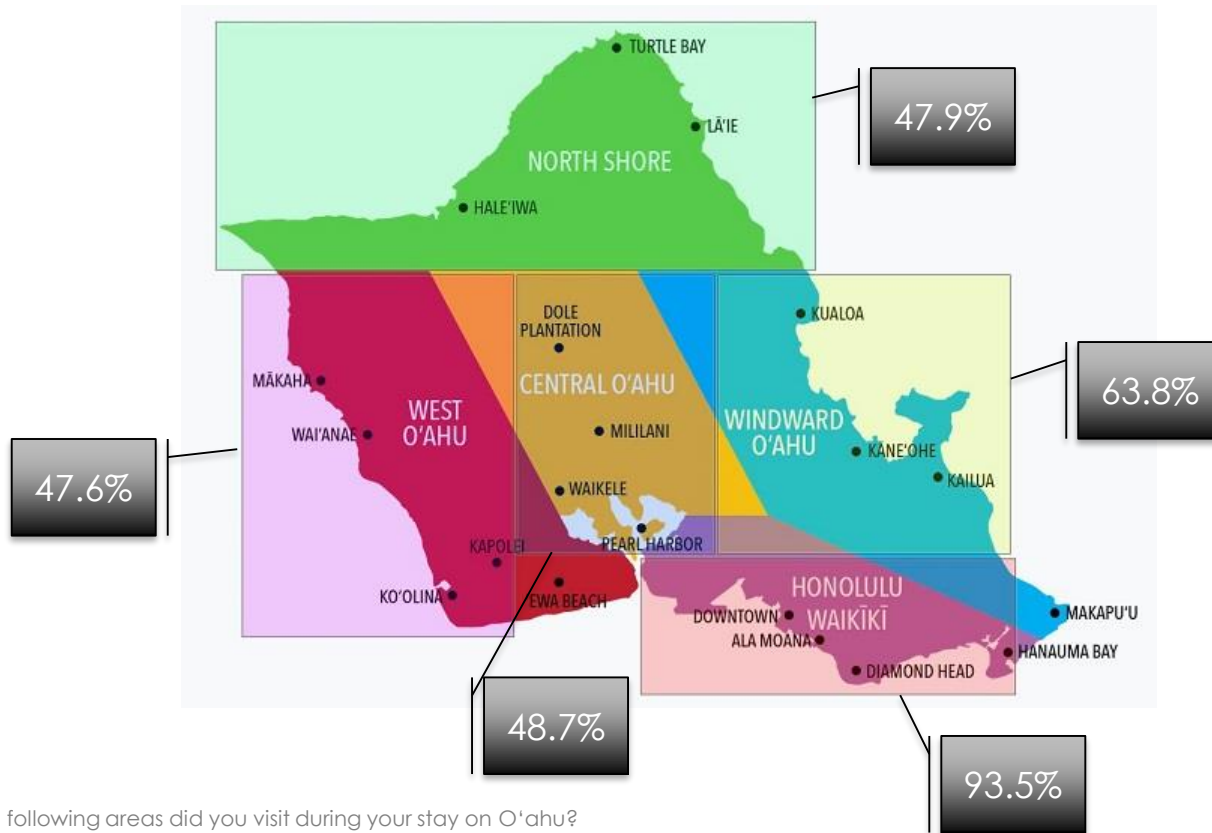
AREAS VISITED EUROPE



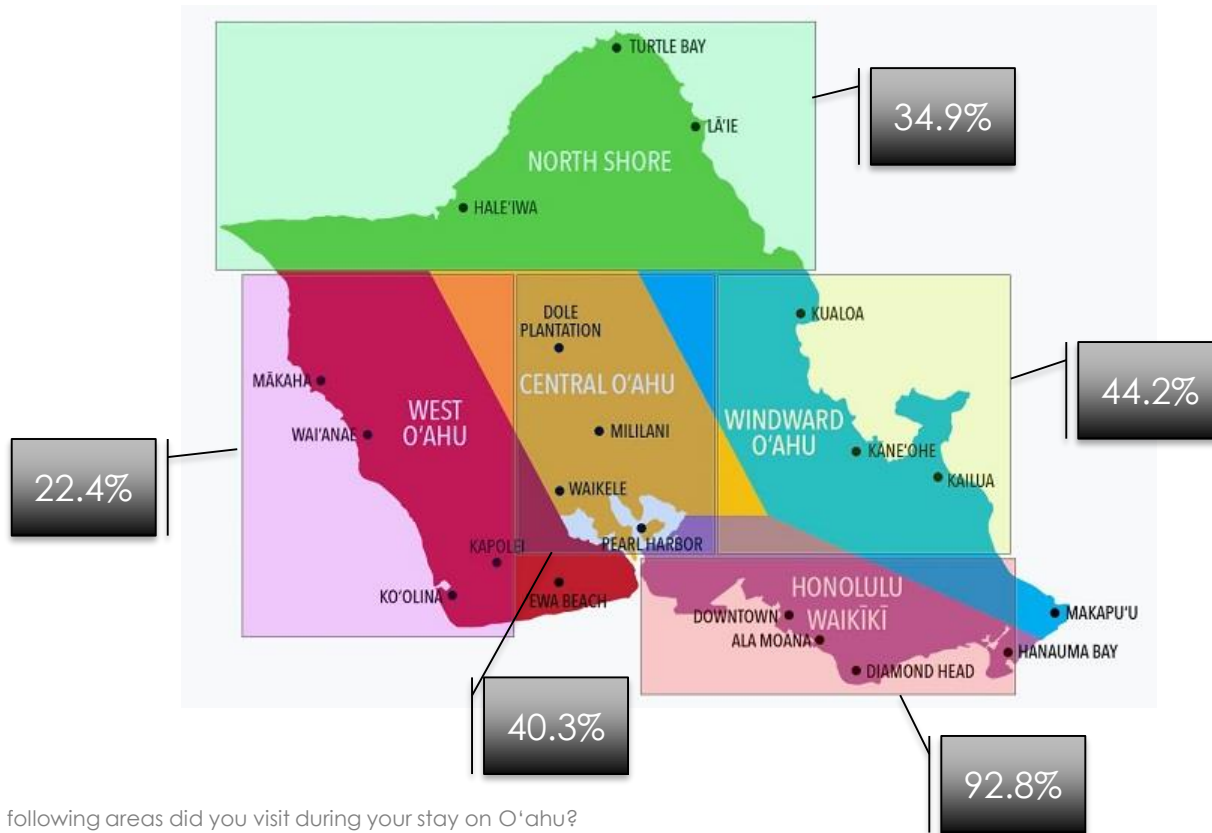
AREAS VISITED OCEANIA



AREAS VISITED CHINA

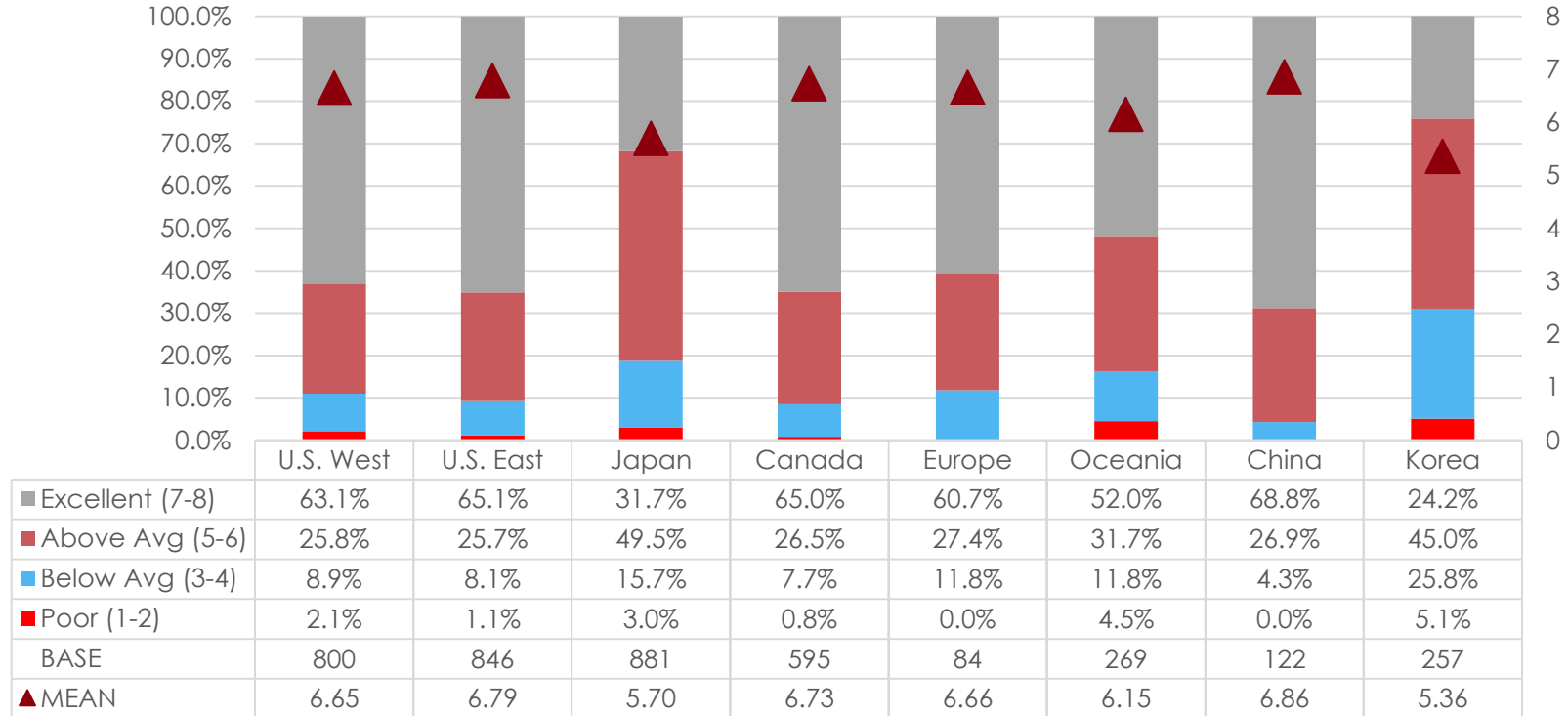


AREAS VISITED KOREA



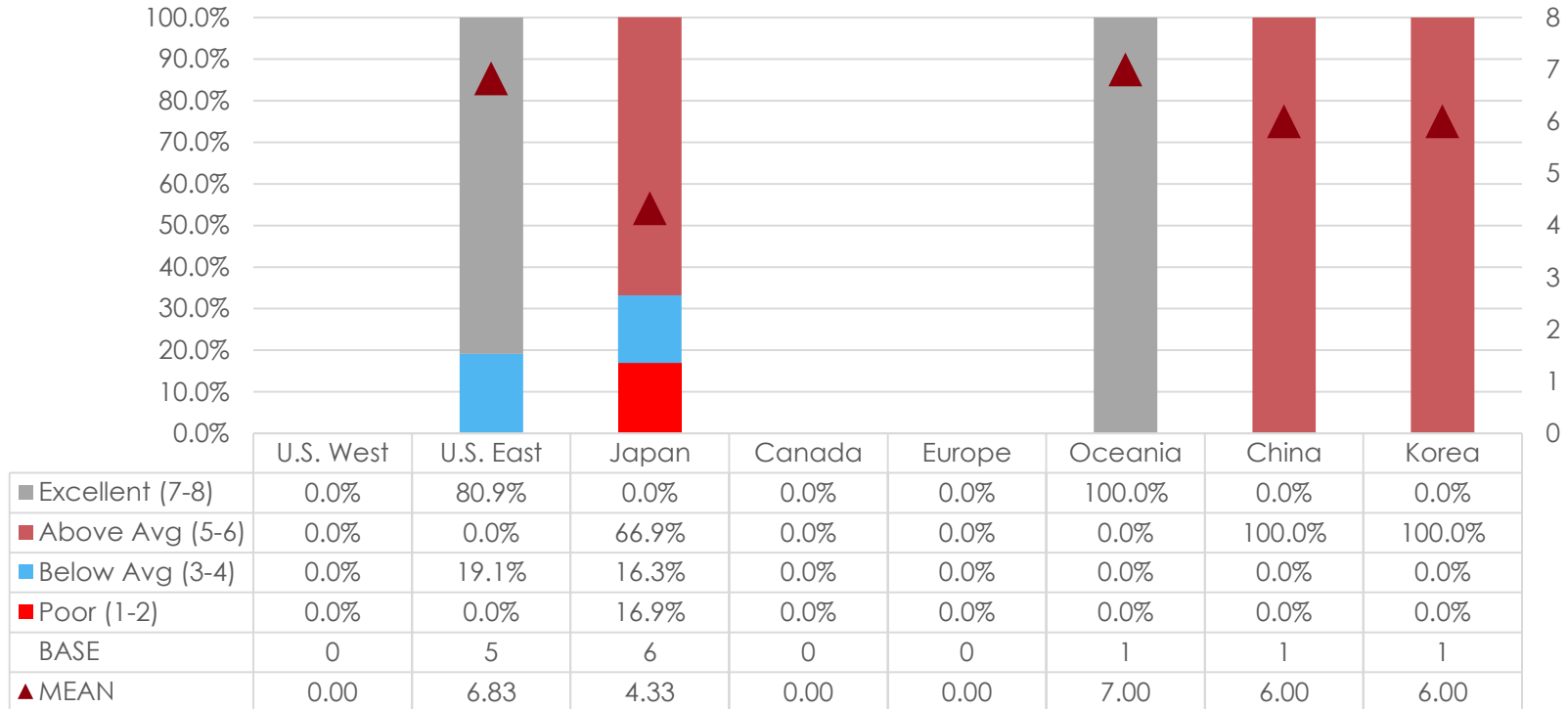
SATISFACTION – Daniel K. Inouye International Airport

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

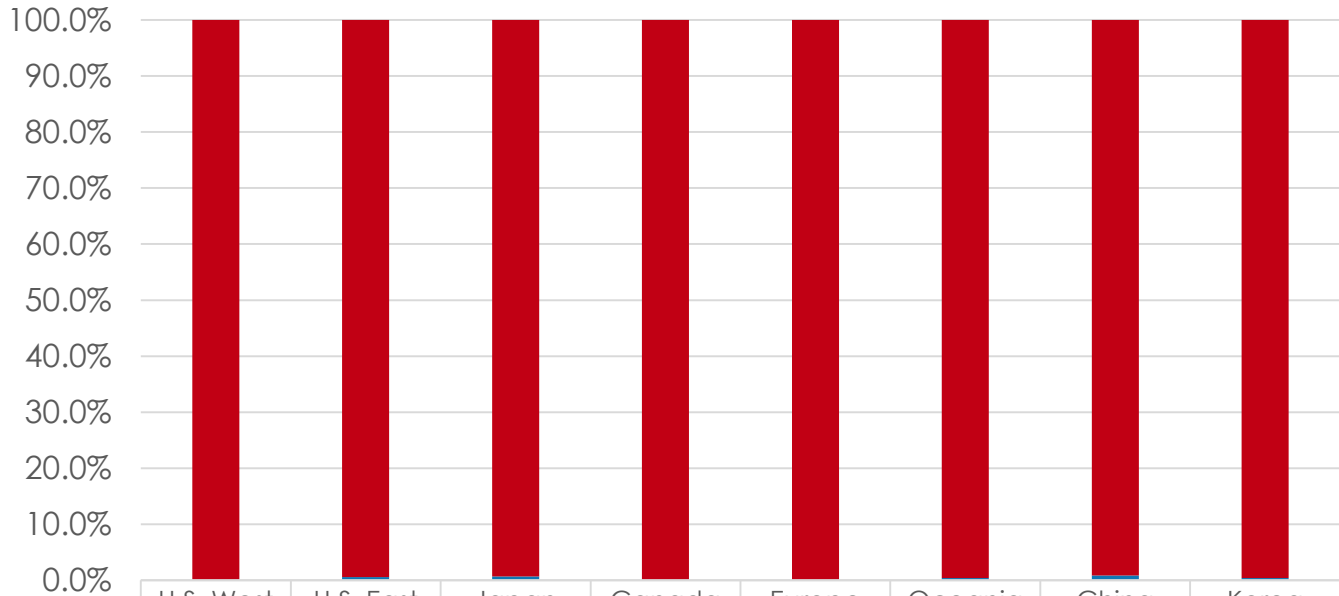


SATISFACTION – Honolulu Harbor

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



TRANSPAC TRAVEL OPTIONS – O‘AHU

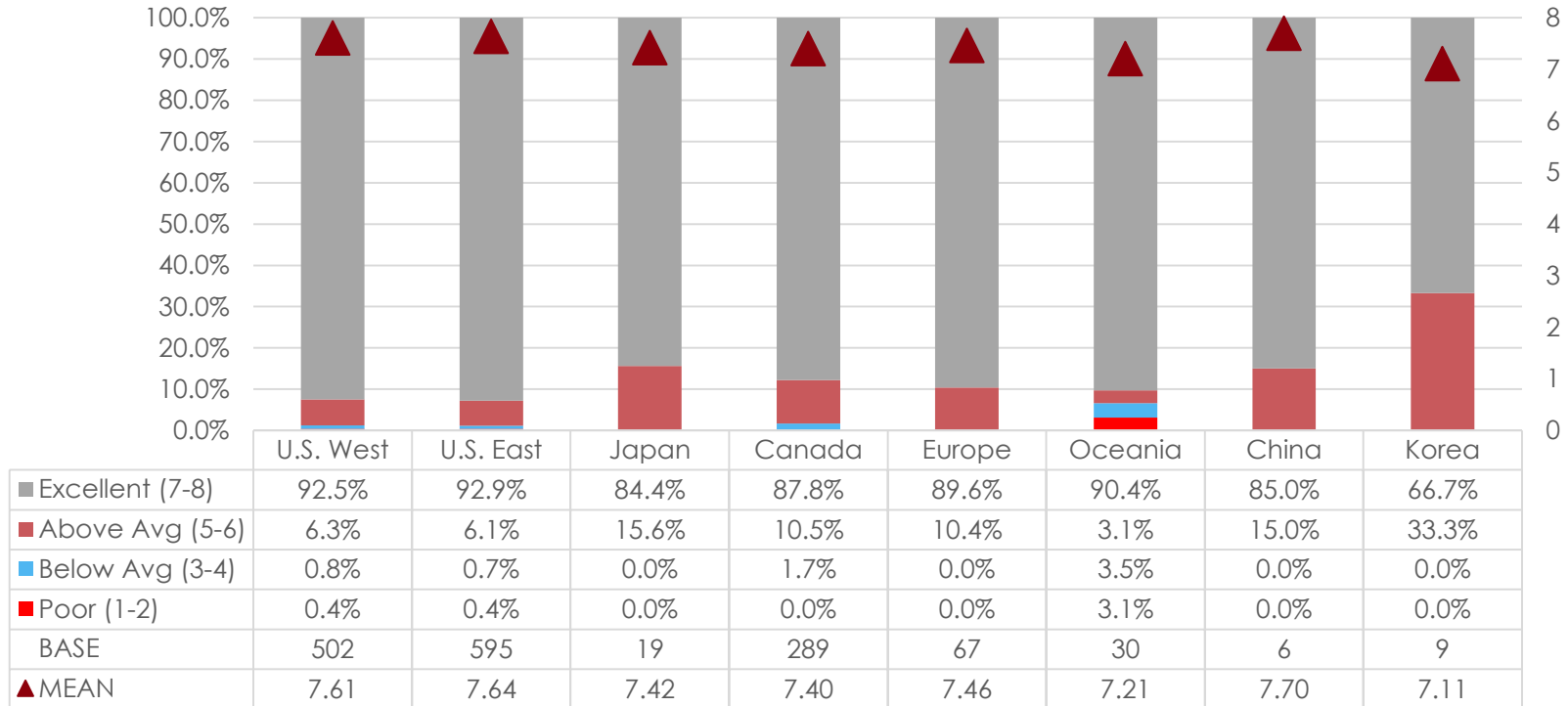


	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
■ Air/ Flight	100.0%	99.4%	99.3%	100.0%	100.0%	99.6%	99.1%	99.6%
■ Cruise Ship/ Ocean Vessel	0.0%	0.6%	0.7%	0.0%	0.0%	0.4%	0.9%	0.4%
BASE	803	854	888	595	85	270	123	258

SECTION – KAUA‘I

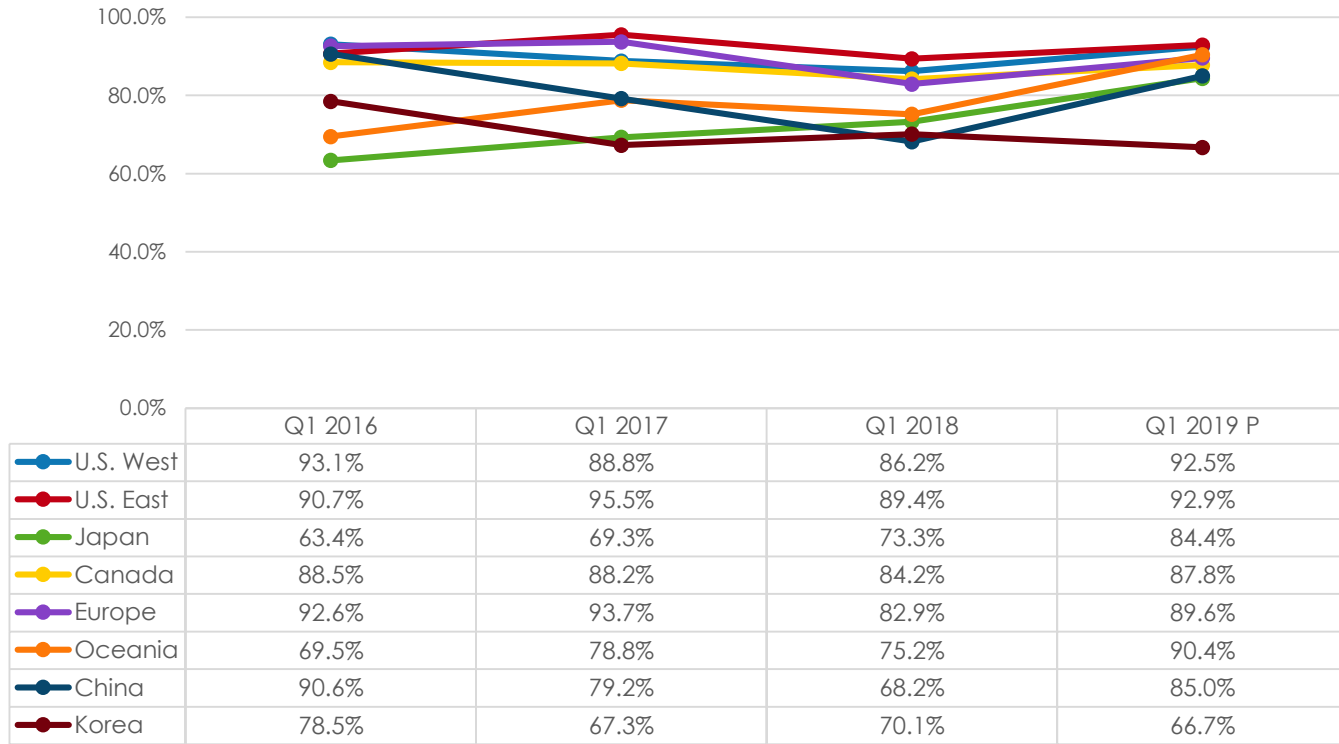
SATISFACTION – KAUA‘I

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



SATISFACTION – KAUA‘I

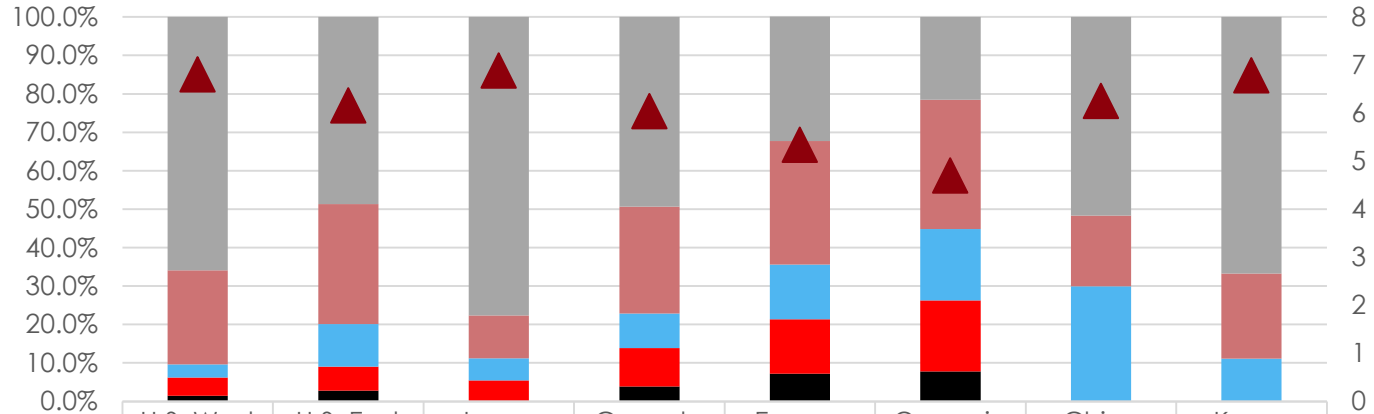
Tracking Data – Rating of “Excellent” (7-8)



P= Preliminary Data

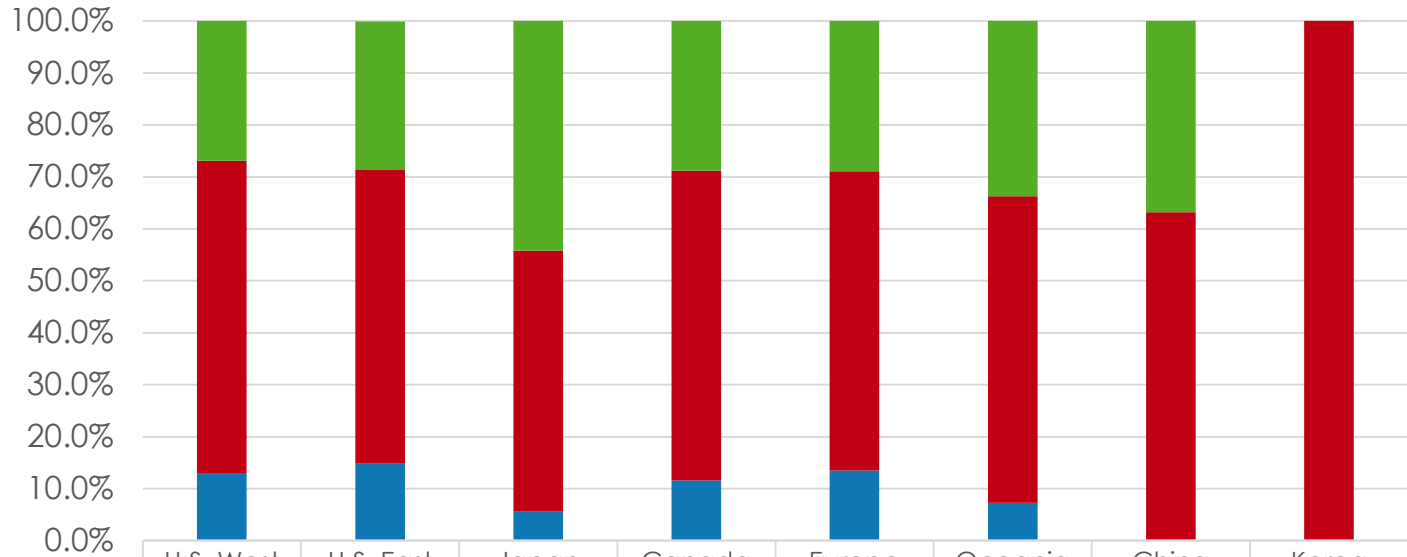
LIKELIHOOD OF RETURN VISIT – KAUA‘I

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)	65.9%	48.7%	77.6%	49.3%	32.4%	21.5%	51.7%	66.7%
Somewhat likely (5-6)	24.5%	31.2%	11.2%	27.8%	32.1%	33.7%	18.4%	22.2%
Somewhat unlikely (3-4)	3.4%	11.1%	5.7%	9.0%	14.2%	18.5%	29.9%	11.1%
Very unlikely (1-2)	4.7%	6.2%	5.5%	10.0%	14.2%	18.5%	0.0%	0.0%
Not sure	1.5%	2.8%	0.0%	3.9%	7.2%	7.8%	0.0%	0.0%
BASE	467	505	18	275	56	27	6	9
MEAN	6.80	6.16	6.88	6.04	5.34	4.70	6.25	6.78

AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	26.9%	28.6%	44.2%	28.8%	28.9%	33.7%	36.8%	0.0%
No Prior Awareness	60.1%	56.4%	50.1%	59.6%	57.6%	59.0%	63.2%	100.0%
Unsure	13.0%	14.9%	5.7%	11.6%	13.5%	7.3%	0.0%	0.0%
BASE	475	508	18	277	59	27	6	9

ATTRACTIONS – KAUA'I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Fern Grotto	7.2%	10.4%	42.1%	11.2%	7.4%	3.1%	0.0%	11.1%
Hanalei Town	52.5%	42.5%	5.2%	52.4%	41.8%	36.7%	0.0%	0.0%
Hanalei Beach	44.5%	37.9%	0.0%	52.4%	41.9%	36.2%	18.4%	11.1%
Kalalau Trail	7.0%	6.7%	0.0%	10.5%	10.4%	10.0%	0.0%	0.0%
Kalapaki Beach	22.7%	22.8%	0.0%	25.9%	32.9%	23.6%	33.3%	0.0%
Bike Path in Kapaa	12.0%	8.6%	0.0%	15.7%	6.0%	3.1%	0.0%	0.0%
Kaua'i Museum	6.0%	3.4%	5.2%	6.0%	3.0%	6.6%	18.4%	0.0%
Ke'e Beach	3.8%	3.1%	0.0%	6.1%	4.5%	3.5%	0.0%	0.0%
Kilauea Lighthouse	33.9%	33.9%	0.0%	40.7%	32.7%	26.6%	51.7%	33.3%
Koke'e	6.2%	7.4%	5.2%	13.4%	10.4%	3.1%	0.0%	0.0%

ATTRACTIONS – KAUA‘I (cont.)

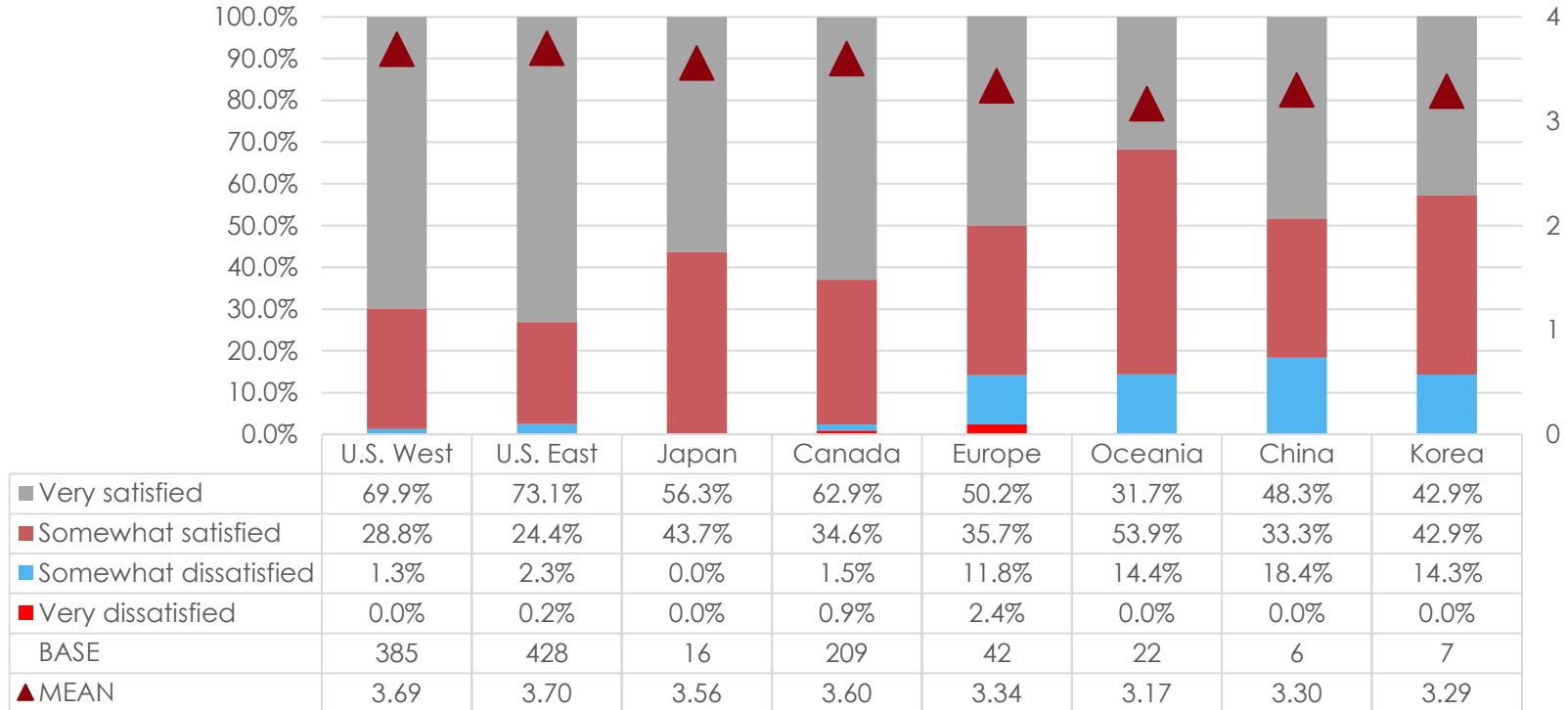
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Koke'e Museum	3.8%	3.4%	0.0%	3.8%	1.5%	0.0%	0.0%	0.0%
Na Aina Kai Gardens	3.4%	2.3%	0.0%	2.4%	3.0%	0.0%	0.0%	0.0%
Napali Coast	35.2%	41.5%	10.6%	41.2%	44.8%	42.8%	33.3%	0.0%
Allerton Garden	10.0%	8.8%	5.2%	8.2%	6.0%	3.5%	0.0%	0.0%
Limahuli Garden	3.2%	3.5%	5.2%	2.9%	3.0%	6.6%	15.0%	0.0%
Old Koloa Town	37.3%	33.0%	0.0%	44.3%	24.0%	13.5%	18.4%	11.1%
Opaeka'a Falls	28.1%	28.6%	21.0%	38.6%	41.6%	29.7%	36.8%	11.1%
Po'ipu Beach	61.5%	50.0%	21.0%	65.0%	44.8%	26.2%	33.3%	22.2%
Smith's Tropical Paradise Gardens	8.7%	9.6%	0.0%	7.8%	4.5%	0.0%	18.4%	0.0%
Spouting Horn	40.0%	36.0%	5.2%	48.9%	34.4%	29.3%	33.3%	11.1%
Wailua Falls	40.0%	39.5%	26.3%	50.0%	52.2%	50.2%	0.0%	22.2%

ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Wailua River	23.1%	23.5%	31.5%	30.2%	31.1%	27.1%	0.0%	0.0%
Waimea Canyon	53.9%	55.5%	41.9%	66.3%	52.1%	66.4%	66.7%	33.3%
Disc Golf	0.8%	0.7%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%
Mini Golf	2.8%	1.9%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%

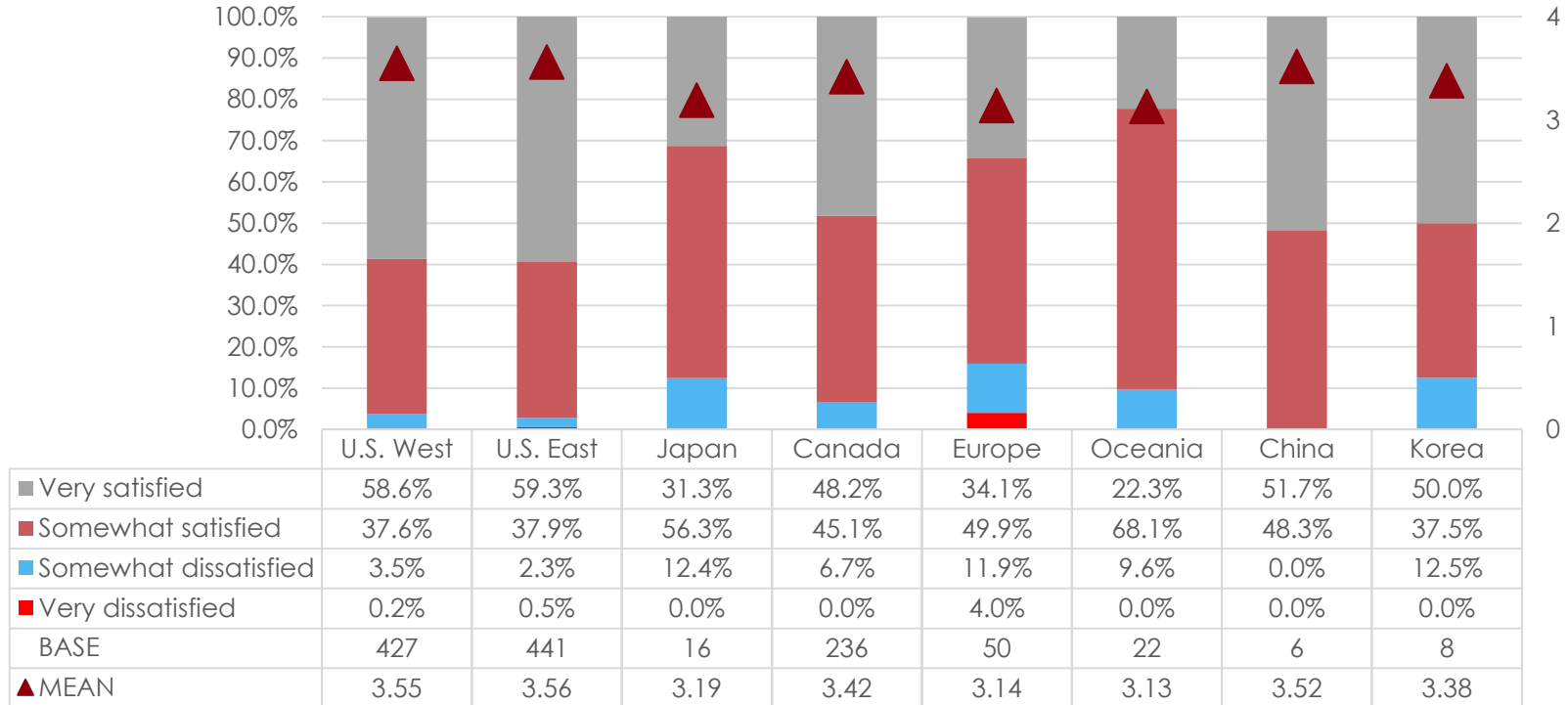
SATISFACTION – ENTERTAINMENT

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



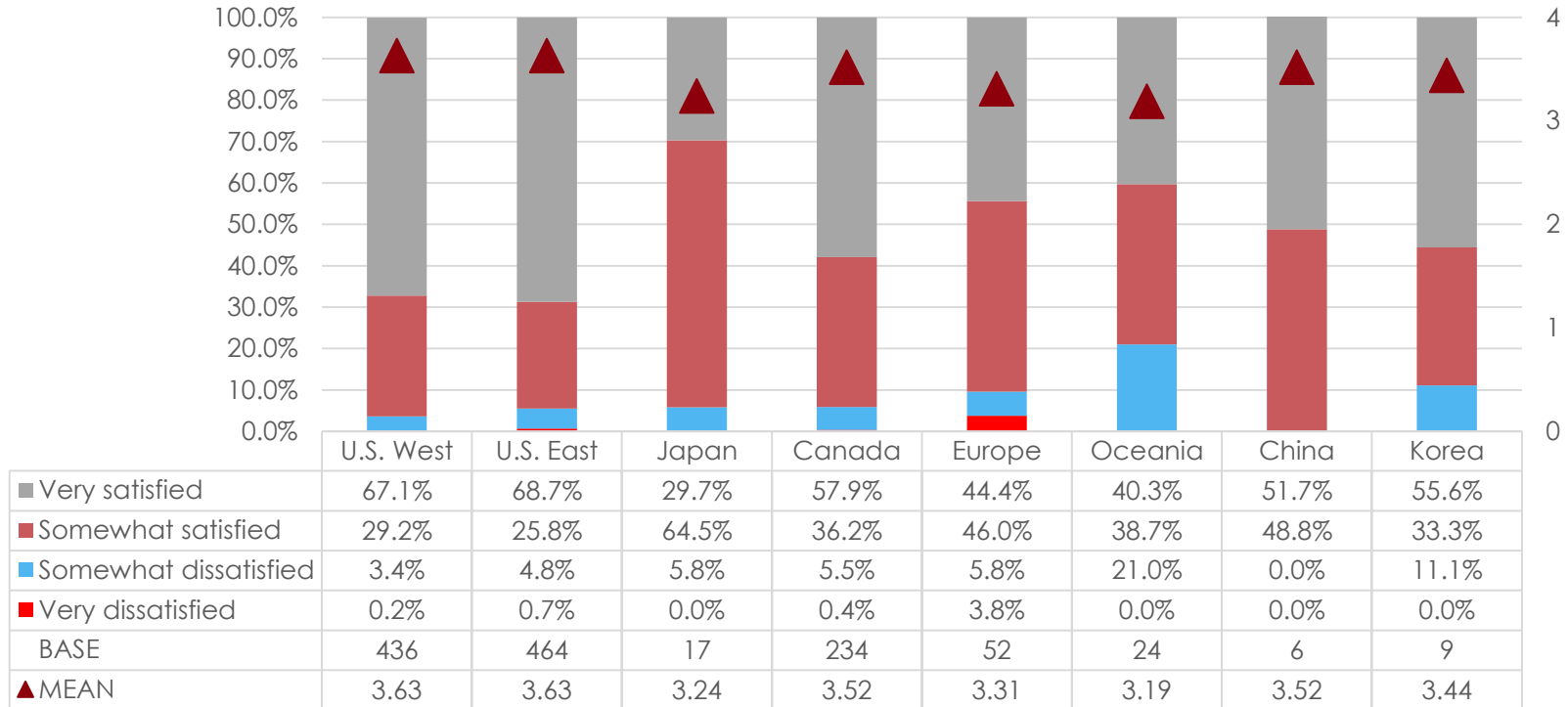
SATISFACTION – SHOPPING

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



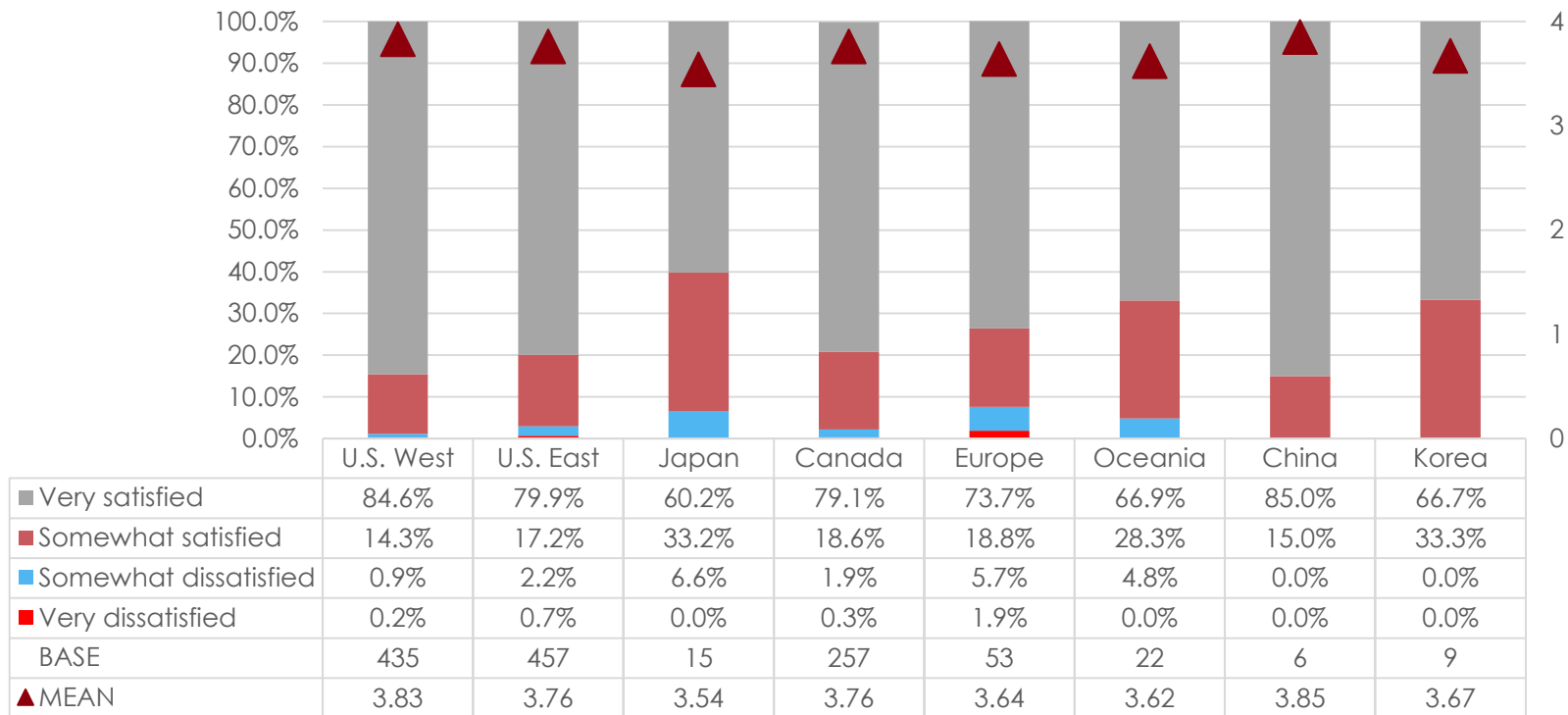
SATISFACTION – DINING

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



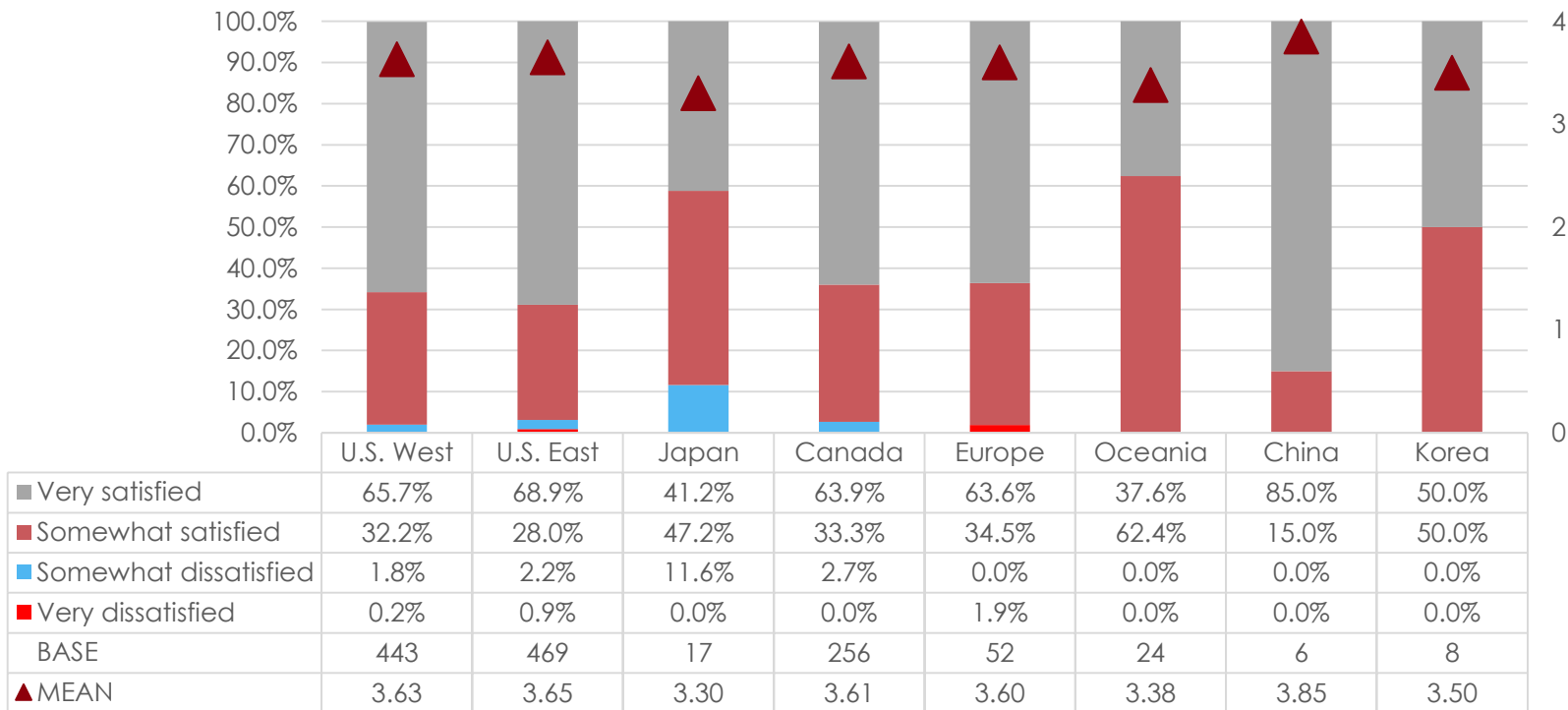
SATISFACTION – BEACHES

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



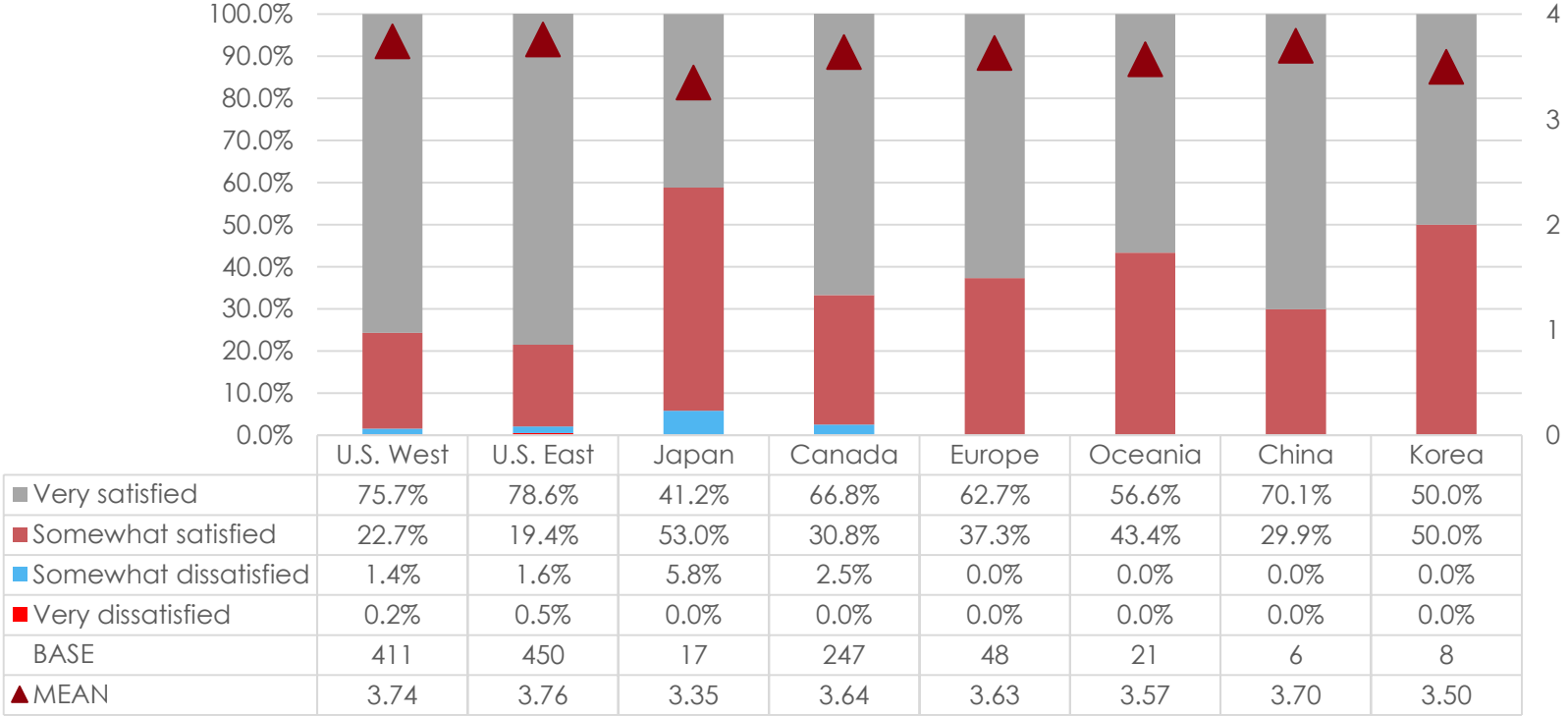
SATISFACTION – PUBLIC AREAS

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



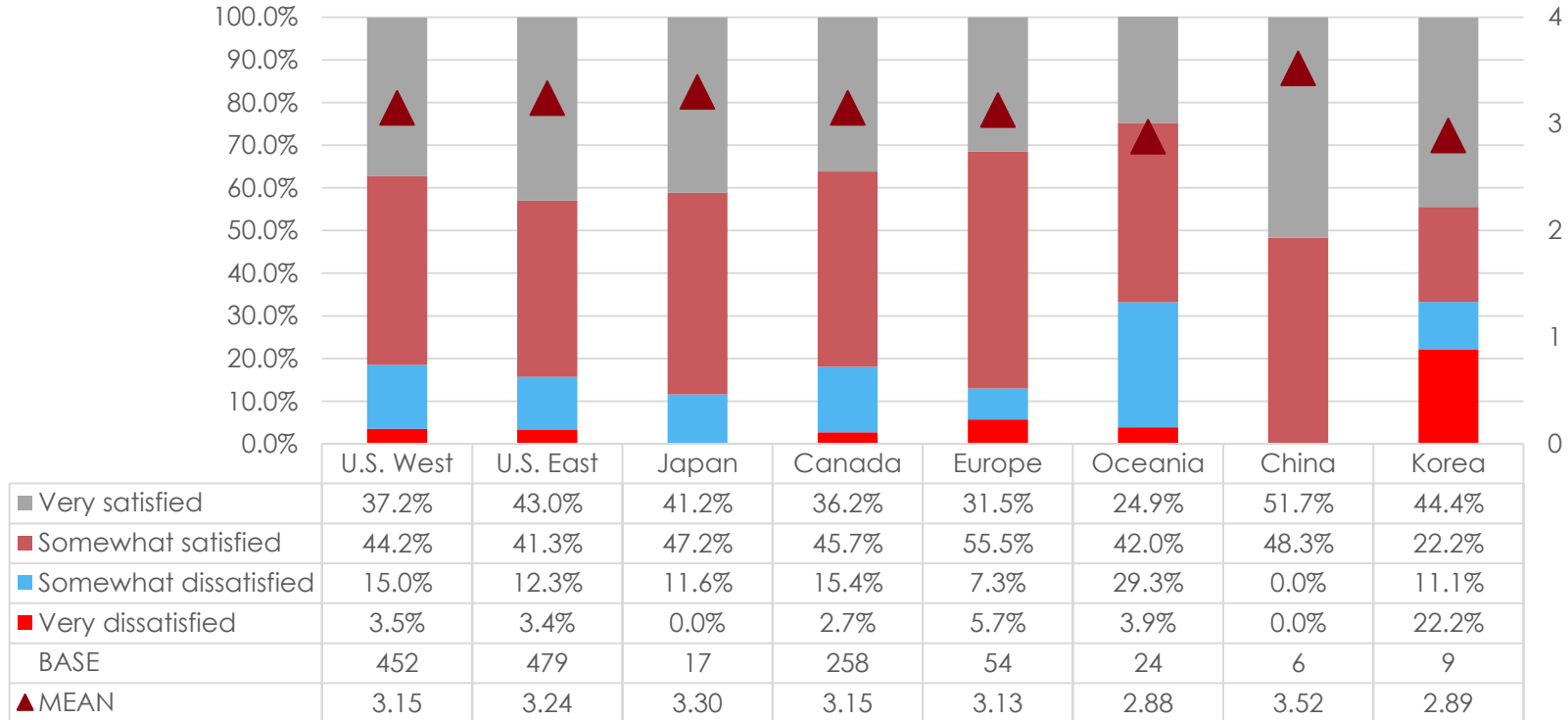
SATISFACTION – PARKS

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



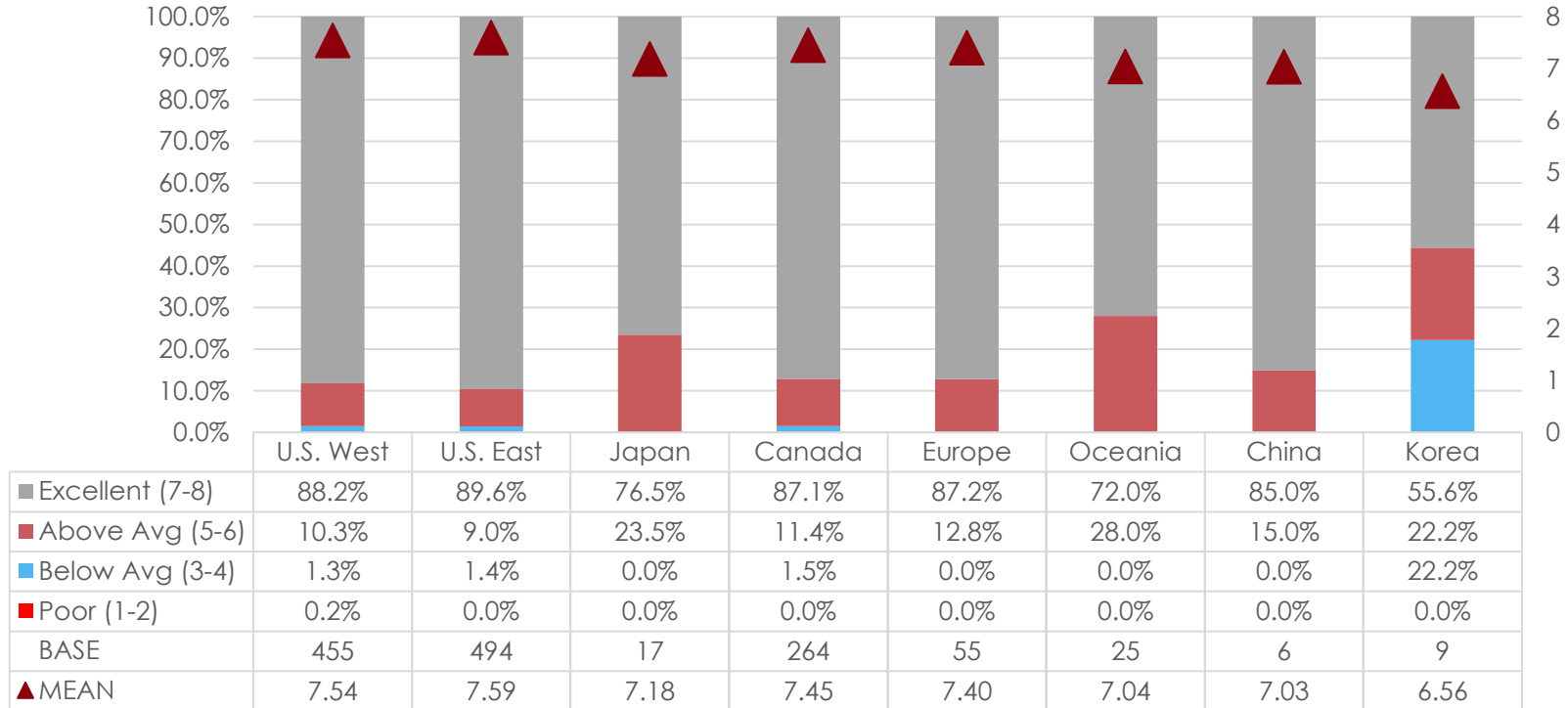
SATISFACTION – ROADS

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



FRIENDLINESS OF KAUA'I RESIDENTS

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



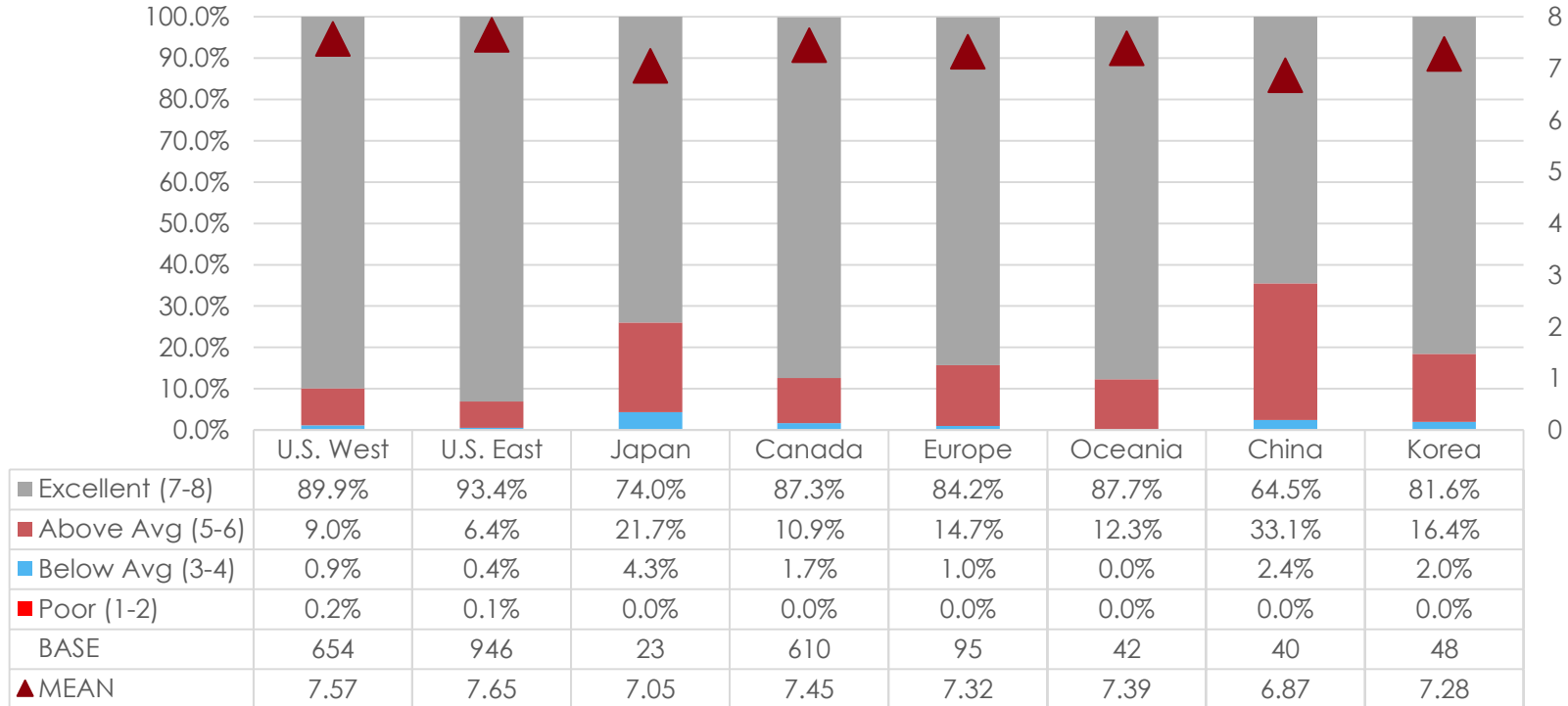
TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Been here before	46.9%	33.2%	0.0%	37.6%	11.1%	7.4%	0.0%	0.0%
Friend recommendation	27.0%	27.3%	47.0%	27.3%	34.5%	28.0%	36.8%	55.6%
Cruise line stop	3.9%	12.1%	6.0%	8.6%	7.3%	16.4%	29.9%	0.0%
Attending conference/ Event	3.7%	3.9%	0.0%	1.1%	5.5%	0.0%	0.0%	0.0%
Travel agent	1.7%	4.3%	11.6%	1.1%	19.9%	20.1%	0.0%	22.2%
Article/ blog	2.0%	3.2%	23.7%	3.6%	9.0%	7.9%	0.0%	0.0%
Visit friends/ family	2.2%	3.2%	0.0%	1.5%	1.8%	0.0%	0.0%	0.0%
Other	1.7%	2.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%
Own timeshare	2.2%	1.2%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%

SECTION – MAUI

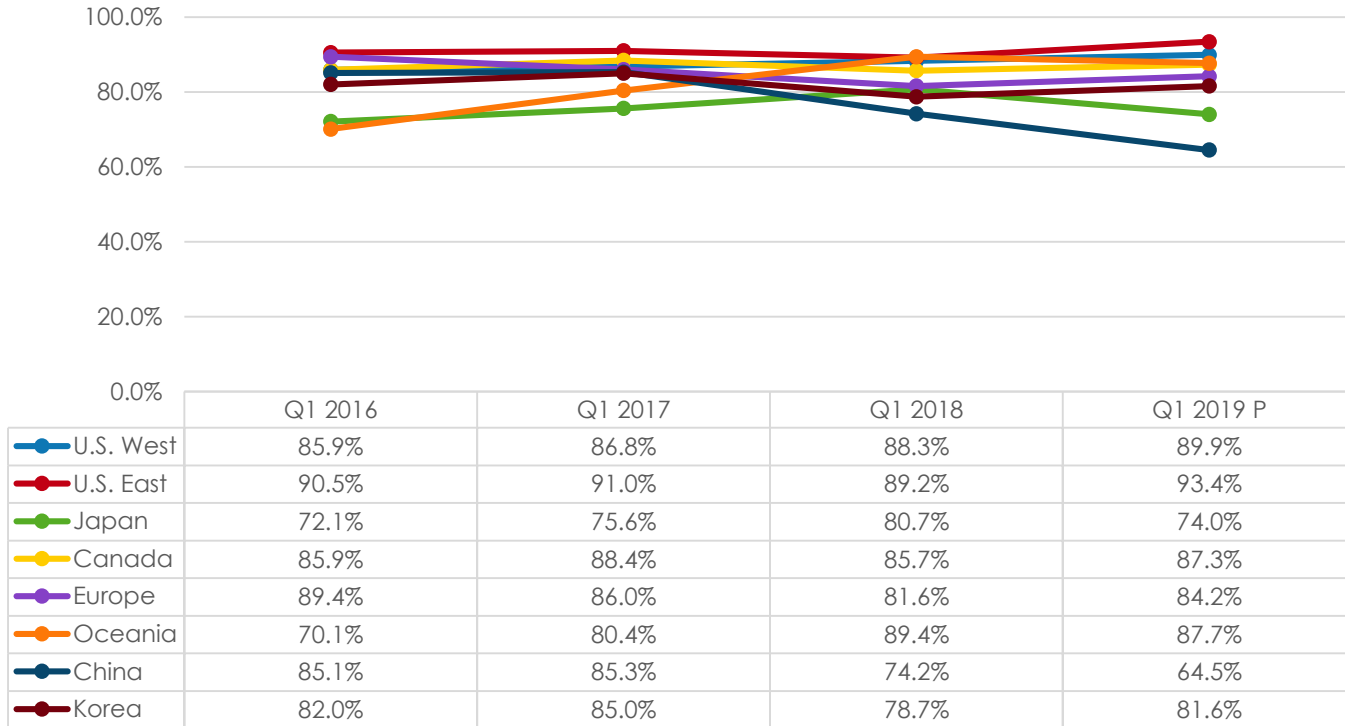
SATISFACTION – MAUI

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



SATISFACTION – MAUI

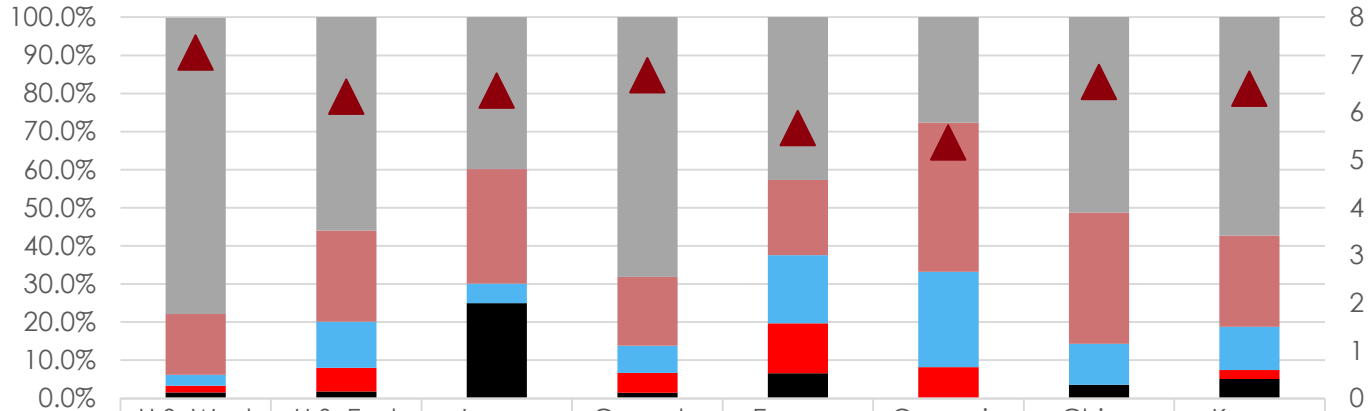
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

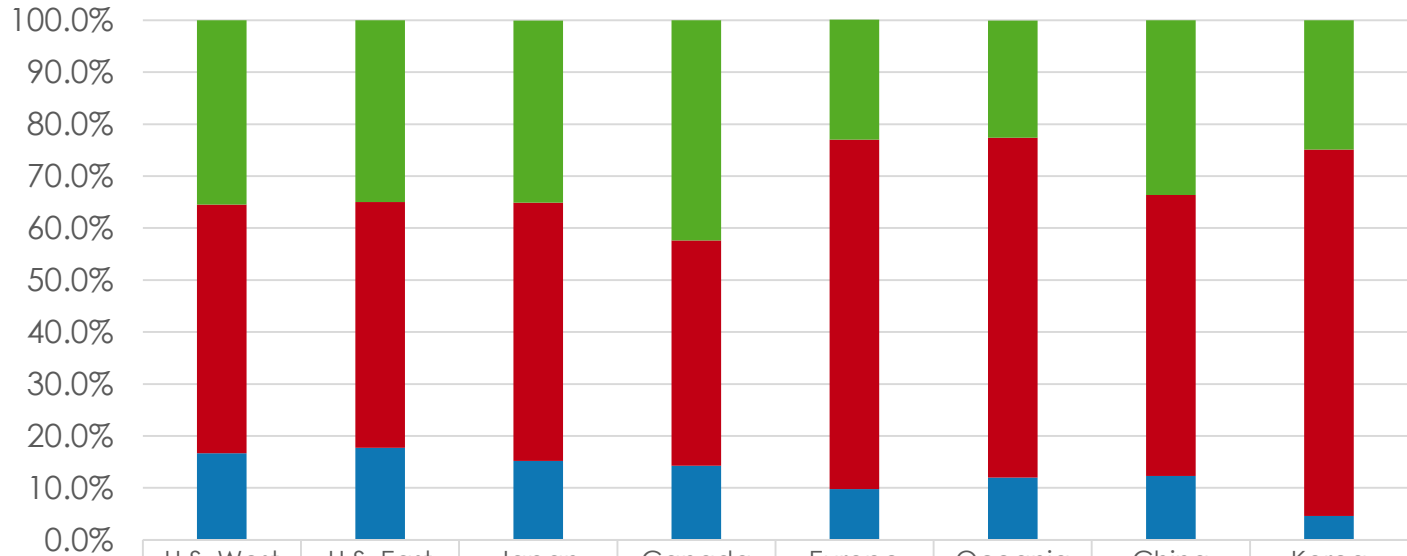
LIKELIHOOD OF RETURN VISIT – MAUI

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



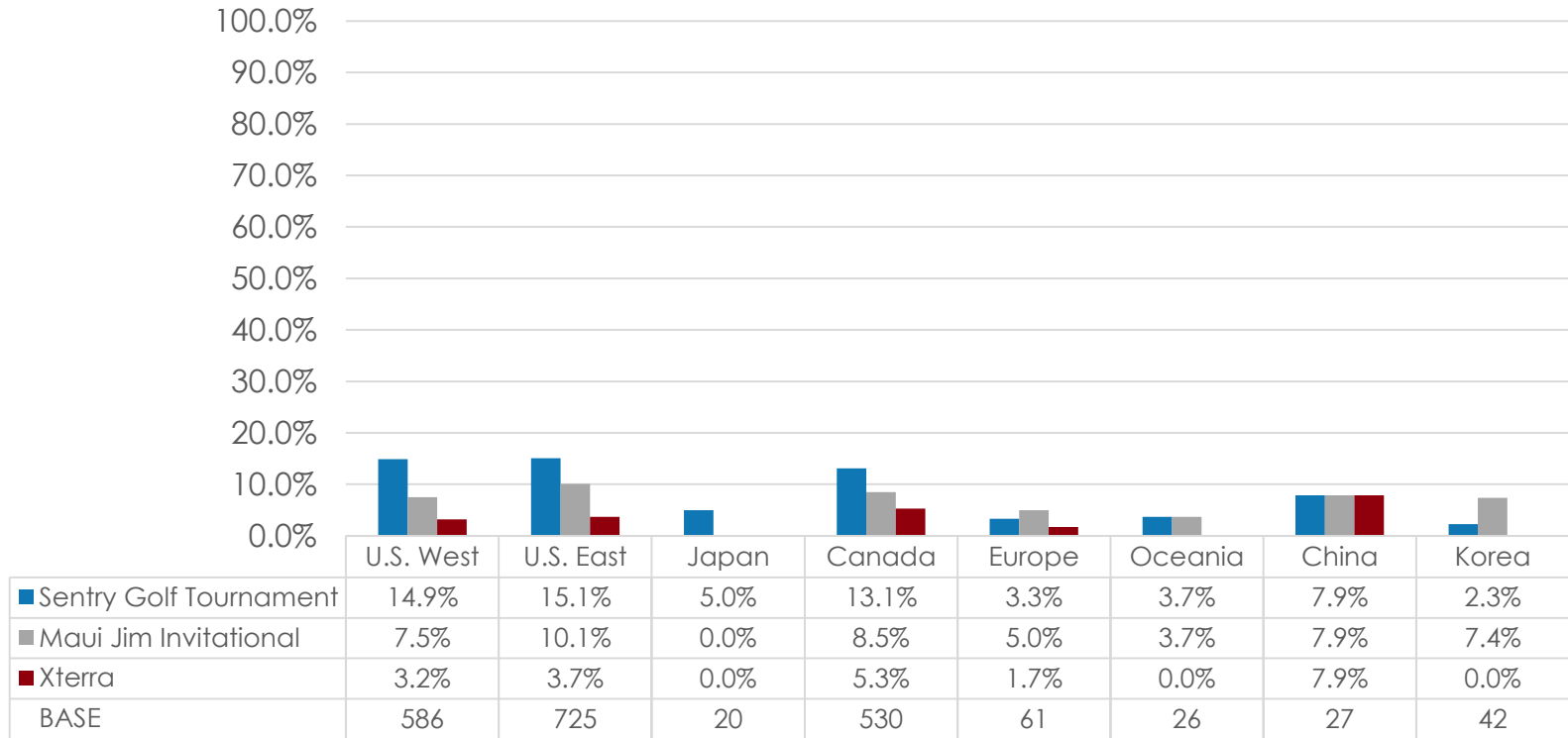
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Very likely (7-8)	77.8%	56.1%	39.8%	68.1%	42.7%	27.7%	51.4%	57.4%
Somewhat likely (5-6)	15.9%	23.9%	30.1%	18.1%	19.7%	39.1%	34.4%	23.9%
Somewhat unlikely (3-4)	2.9%	12.1%	5.1%	7.1%	17.9%	25.0%	10.7%	11.4%
Very unlikely (1-2)	1.7%	6.2%	0.0%	5.2%	13.1%	8.2%	0.0%	2.3%
Not sure	1.6%	1.8%	25.0%	1.5%	6.6%	0.0%	3.6%	5.1%
BASE	576	712	20	524	61	25	27	42
MEAN	7.26	6.33	6.46	6.78	5.67	5.37	6.64	6.50

AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Aided Ad Awareness	35.5%	35.0%	35.0%	42.4%	23.1%	22.5%	33.6%	24.9%
No Prior Awareness	47.8%	47.3%	49.7%	43.3%	67.2%	65.4%	54.1%	70.5%
Unsure	16.7%	17.7%	15.2%	14.3%	9.8%	12.0%	12.3%	4.6%
BASE	586	725	20	530	61	26	27	42

AIDED ADVERTISING AWARENESS – MAUI EVENTS



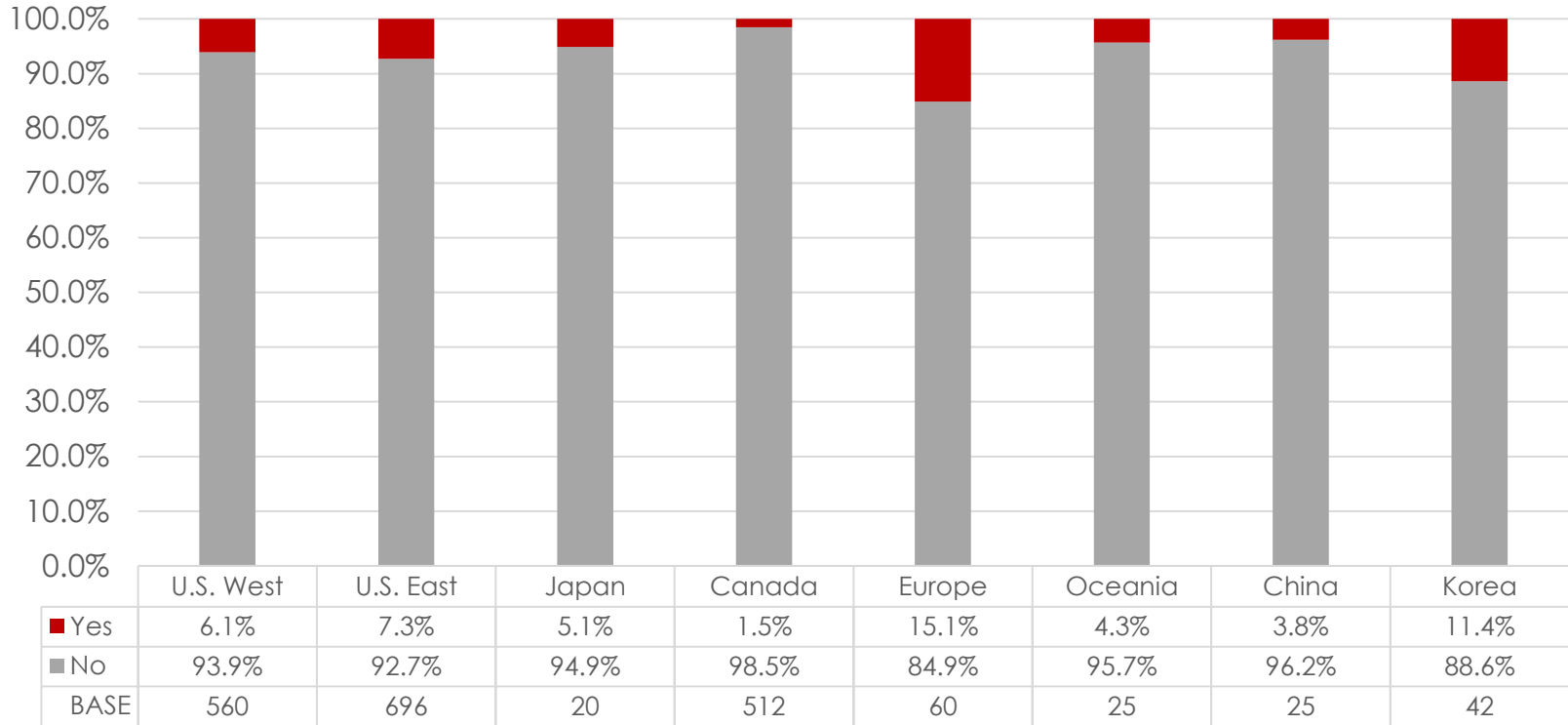
MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
None of these	69.7%	67.4%	49.7%	63.6%	63.9%	61.8%	38.0%	27.9%
Outdoor or sporting activities and events	20.1%	18.0%	15.0%	16.2%	21.3%	11.5%	30.1%	33.0%
Hawaiian cultural events	10.4%	10.4%	9.9%	11.5%	6.6%	14.7%	28.4%	9.1%
Social media posts and videos	7.8%	8.9%	10.1%	13.6%	9.8%	19.9%	22.1%	29.5%
TV programs/ Movies filmed in Hawaii	4.2%	8.9%	25.1%	11.0%	11.4%	14.7%	18.6%	24.4%
Hawaiian Music	7.0%	4.9%	5.1%	9.4%	4.9%	3.7%	3.6%	0.0%

ATTRACTIONS – MAUI

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Alexander & Baldwin Sugar Museum	3.7%	1.9%	4.3%	3.3%	1.1%	0.0%	0.0%	4.5%
Aquarium Maui /Maui Ocean Center	15.2%	12.4%	4.3%	21.7%	7.4%	4.7%	10.8%	4.5%
Baldwin Missionary Home Museum	5.1%	2.9%	0.0%	5.0%	5.3%	2.5%	0.0%	4.5%
Hale Pa'i Printing House	0.2%	0.5%	0.0%	0.3%	0.0%	0.0%	2.4%	0.0%
Haleakala National Park	23.3%	29.1%	17.2%	27.1%	26.4%	19.0%	24.2%	51.1%
Haleki'i-Pihana Heiau State Monument	1.4%	2.1%	0.0%	2.1%	1.1%	2.5%	5.4%	4.9%
Hana Cultural Center	5.6%	9.9%	0.0%	10.1%	15.9%	7.3%	30.7%	6.4%
'Iao Valley State Monument	14.3%	13.5%	12.9%	13.0%	11.6%	2.5%	3.0%	19.8%
Kepaniwai Park & Heritage Gardens	2.0%	3.5%	0.0%	4.0%	2.1%	7.3%	2.4%	0.0%
Kula Botanical Garden	4.1%	4.7%	13.1%	7.5%	9.6%	7.3%	7.3%	8.9%
Maui Historical Society Bailey House Museum	3.4%	2.6%	0.0%	1.4%	2.1%	0.0%	0.0%	2.5%
Whaler's Village Museum	13.3%	11.3%	4.3%	12.2%	8.4%	9.5%	30.1%	6.9%
Wo Hing Temple Museum	2.4%	1.5%	0.0%	1.5%	2.1%	5.1%	2.4%	2.0%

VISITED MAUI FOR SPECIFIC EVENT



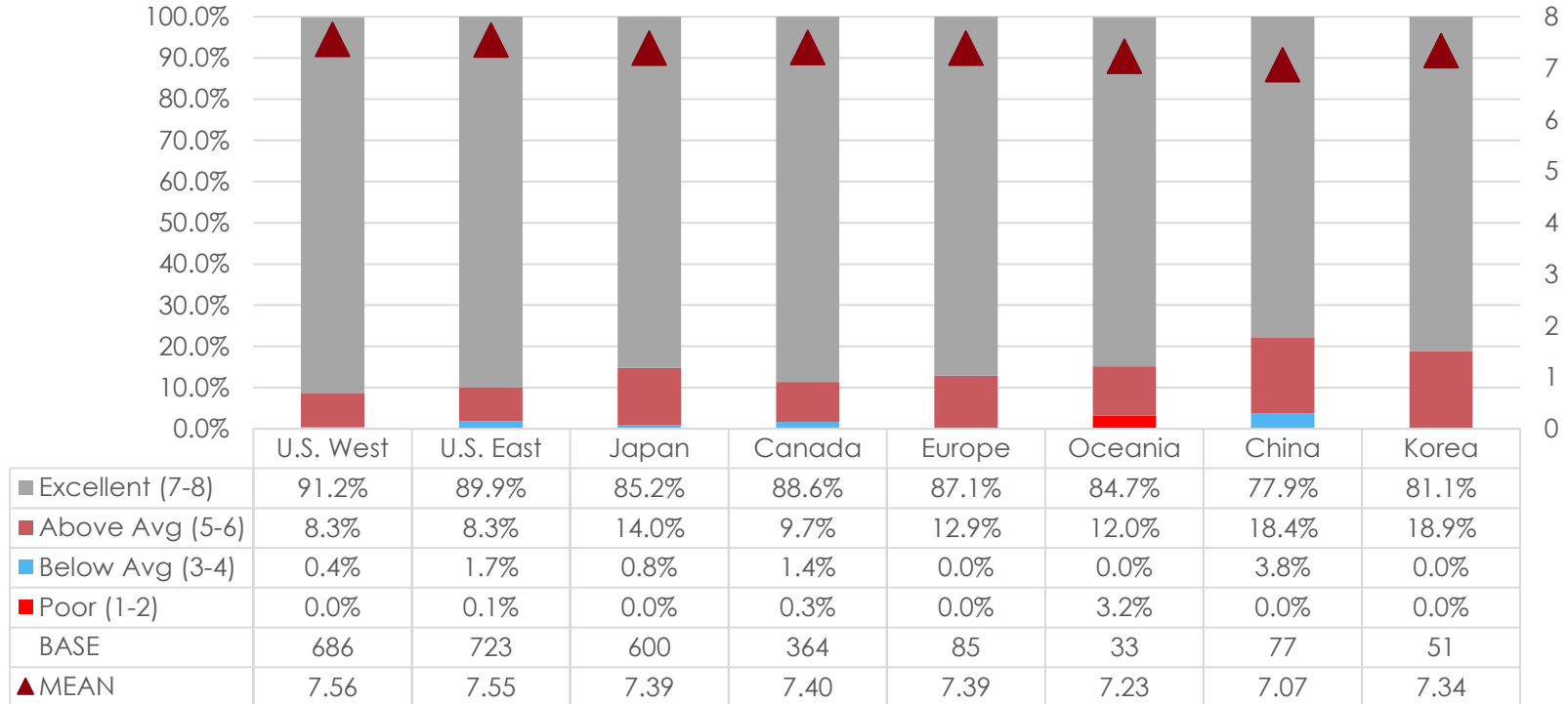
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training	23.3%	31.7%	0.0%	50.9%	44.3%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	29.6%	10.2%	0.0%	0.0%	11.2%	0.0%	0.0%	0.0%
Maui Marathon	11.7%	27.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wedding/ honeymoon, anniversary/ birthday/ funeral	20.6%	8.2%	0.0%	13.2%	22.1%	100.0%	0.0%	20.0%
Other	5.9%	5.9%	0.0%	0.0%	11.2%	0.0%	0.0%	40.0%
Other sporting event	3.0%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whale watching	5.9%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hawaii Food & Wine Festival	0.0%	2.0%	0.0%	11.3%	0.0%	0.0%	0.0%	40.0%
Other Festival/ concert	0.0%	1.8%	0.0%	11.3%	11.2%	0.0%	0.0%	0.0%

SECTION – ISLAND OF HAWAI‘I

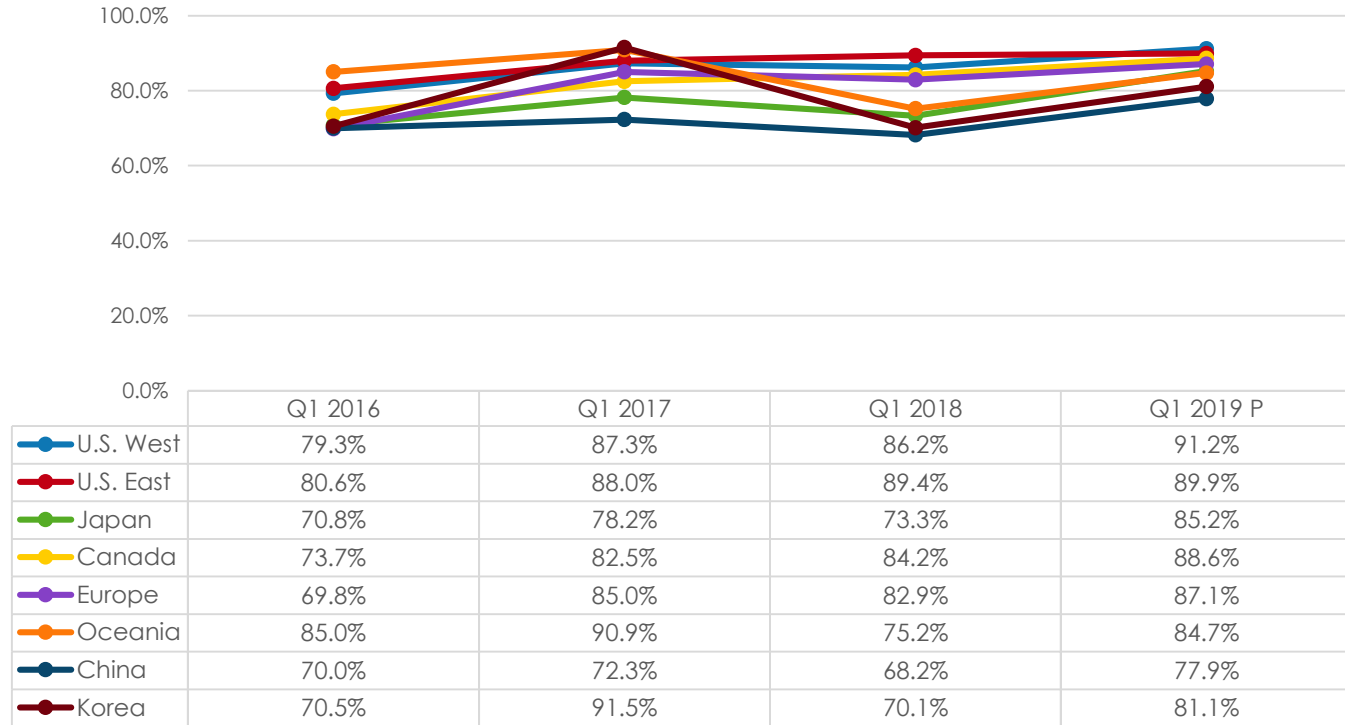
SATISFACTION – ISLAND OF HAWAI‘I

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



SATISFACTION – ISLAND OF HAWAI‘I

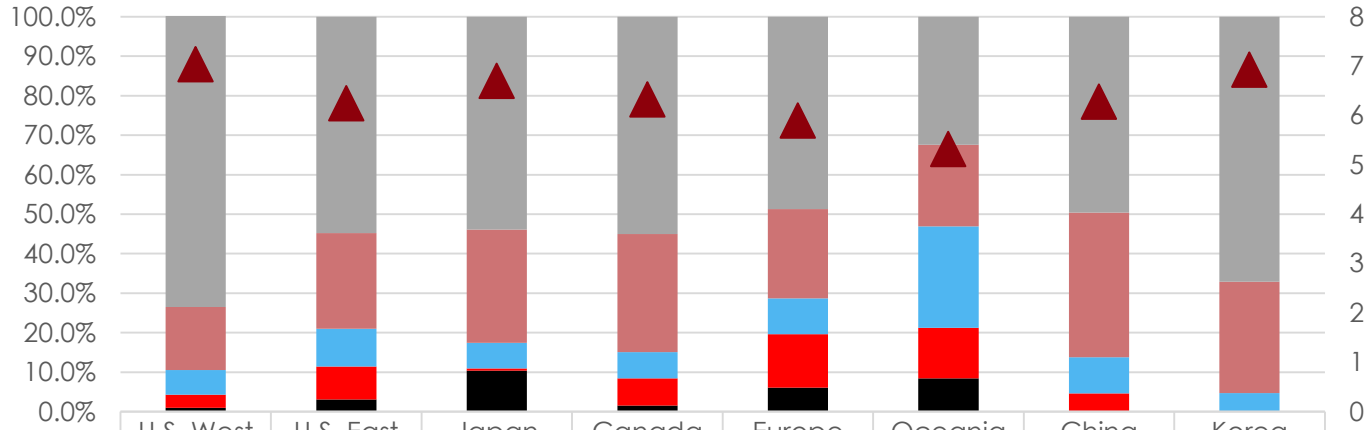
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

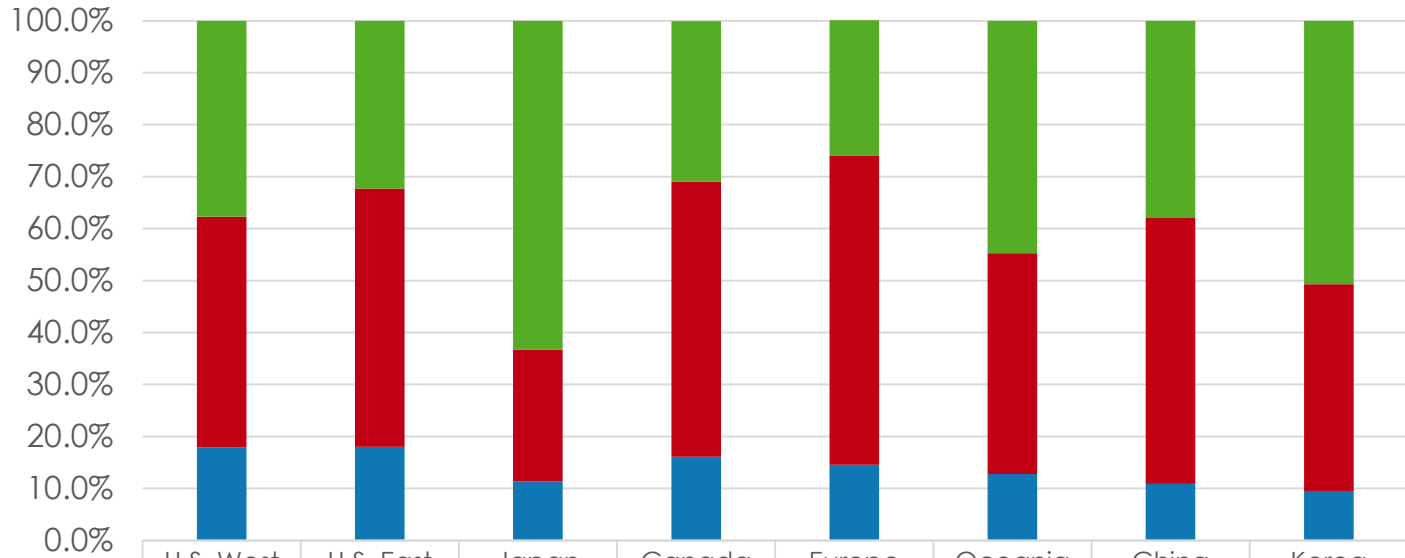
LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

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)	73.7%	54.8%	53.9%	55.0%	48.7%	32.4%	49.6%	67.1%
■ Somewhat likely (5-6)	16.0%	24.2%	28.7%	29.9%	22.6%	20.7%	36.6%	28.2%
■ Somewhat unlikely (3-4)	6.2%	9.6%	6.5%	6.7%	9.1%	25.7%	9.2%	4.7%
■ Very unlikely (1-2)	3.3%	8.3%	0.5%	6.9%	13.5%	12.8%	4.6%	0.0%
■ Not sure	1.0%	3.1%	10.4%	1.5%	6.1%	8.4%	0.0%	0.0%
BASE	613	540	558	313	66	24	63	44
▲ MEAN	7.04	6.25	6.70	6.33	5.90	5.32	6.28	6.93

AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



■ Aided Ad Awareness	37.7%	32.3%	63.3%	30.9%	26.1%	44.7%	37.8%	50.7%
■ No Prior Awareness	44.4%	49.7%	25.3%	52.9%	59.4%	42.5%	51.3%	39.8%
■ Unsure	17.9%	18.0%	11.4%	16.1%	14.6%	12.8%	10.9%	9.5%
BASE	616	547	562	316	69	24	66	44

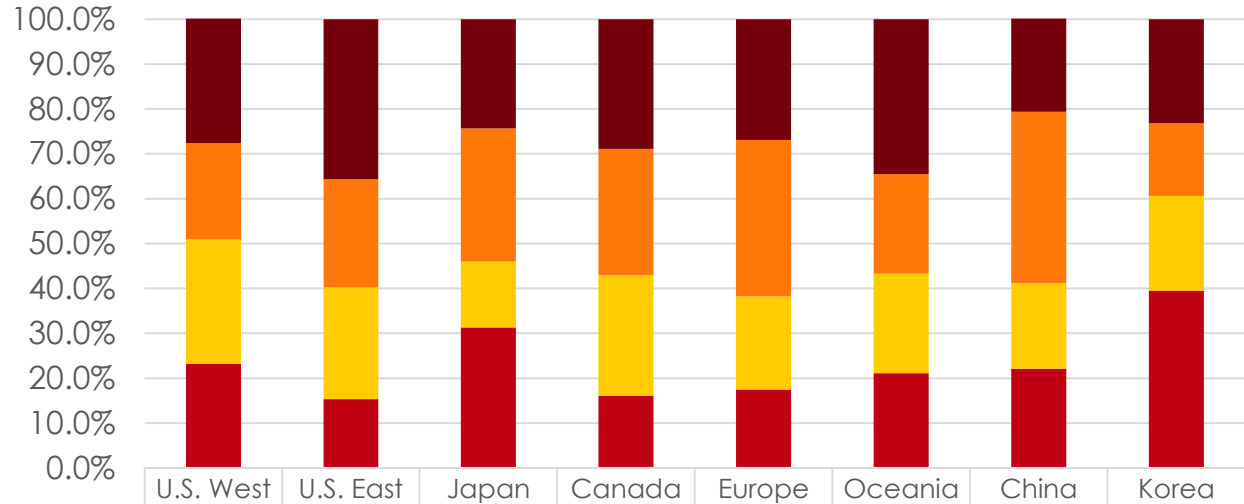
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
‘Akaka Falls	23.6%	27.9%	17.8%	31.8%	35.2%	18.1%	17.8%	42.7%
Botanical Gardens	18.1%	13.6%	1.5%	18.3%	17.6%	14.1%	14.6%	21.6%
H.N. Greenwell Store	3.5%	3.7%	1.0%	4.5%	1.2%	0.0%	2.5%	3.7%
Hawaii Volcanoes National Park	40.7%	47.1%	36.3%	55.1%	52.9%	53.8%	65.8%	55.5%
Hilo Farmers Market	23.1%	17.9%	11.3%	21.9%	18.8%	6.0%	20.3%	19.7%
Hulihe‘e Palace	6.7%	5.3%	5.2%	7.6%	9.4%	9.2%	2.5%	7.4%
‘Imiloa Astronomy Ctr	2.3%	1.7%	1.2%	4.8%	2.3%	2.8%	12.5%	13.8%
Kaloko-Honokohau National Historical Park	7.7%	8.9%	1.3%	13.7%	12.9%	2.8%	12.8%	4.1%
Kona Coffee Living History Farm	10.5%	16.3%	16.1%	14.3%	11.7%	17.7%	19.3%	36.6%
Lili‘uokalani Park and Garden	7.4%	9.0%	1.7%	6.8%	3.5%	5.6%	1.3%	13.8%

ATTRACTIONS – ISLAND OF HAWAI'I (cont.)

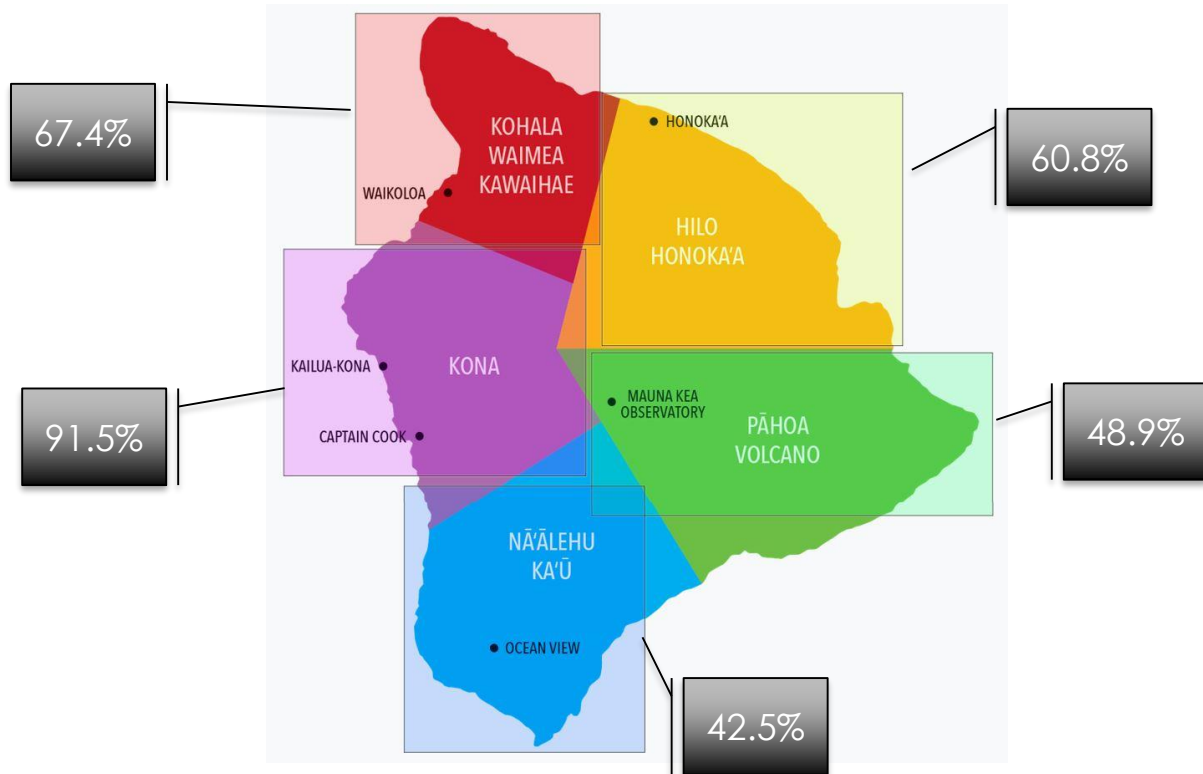
	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Lyman House Memorial Museum	2.3%	0.7%	0.3%	1.2%	0.0%	2.8%	3.8%	0.0%
Maunakea	11.6%	16.8%	32.6%	22.0%	29.3%	15.3%	34.3%	27.9%
Orchid Farm	4.2%	3.8%	0.5%	4.8%	1.2%	8.8%	13.1%	7.8%
Pacific Tsunami Museum	4.1%	2.9%	0.8%	2.6%	2.3%	6.0%	1.3%	2.3%
Pana'ewa Rainforest Zoo & Garden	5.0%	3.2%	0.5%	4.7%	2.3%	2.8%	3.8%	3.7%
Pu'uhonua o Honaunau National Historical Park	18.5%	17.2%	2.8%	24.8%	24.7%	15.3%	6.3%	13.8%
Pu'ukohola Heia National Historical Site	7.3%	9.5%	1.3%	14.0%	16.4%	5.6%	5.0%	1.8%
Punalu'u Black Sand Beach	29.5%	33.2%	13.0%	39.0%	32.9%	26.5%	44.3%	23.8%
Rainbow Falls	23.7%	25.6%	13.3%	28.2%	34.0%	17.7%	37.7%	12.3%
Volcano Art Center	6.8%	10.4%	8.2%	7.7%	9.4%	14.5%	4.0%	13.3%

TRAVEL ON ISLAND OF HAWAI'I

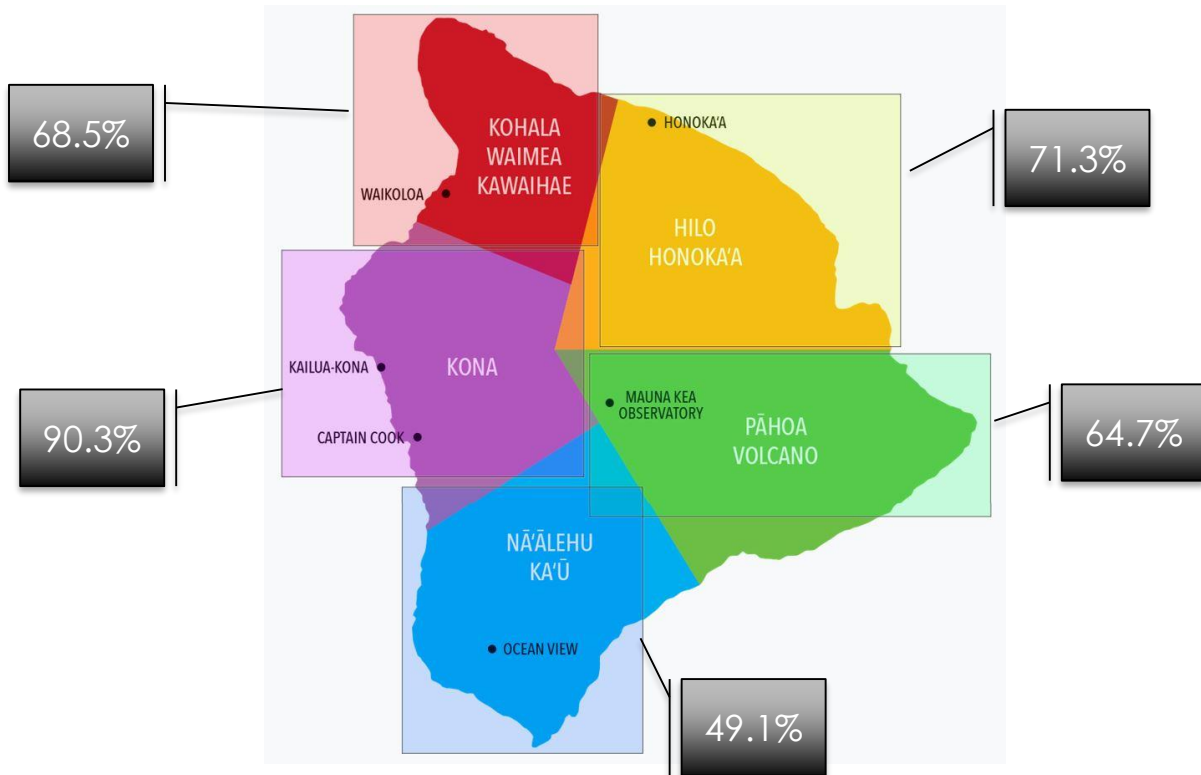


■ Traveled to other side of island	27.7%	35.7%	24.3%	28.9%	26.9%	34.5%	20.7%	23.2%
■ Traveled more than 1 hour	21.5%	24.0%	29.7%	28.1%	34.9%	22.2%	38.2%	16.2%
■ Traveled 1 hour or less one way to reach activity	27.7%	25.0%	14.7%	26.9%	20.7%	22.2%	19.1%	21.1%
■ Enjoy activities- short drive from accommodations	23.2%	15.3%	31.3%	16.1%	17.5%	21.1%	22.1%	39.5%
● BASE	590	525	552	301	63	23	62	43

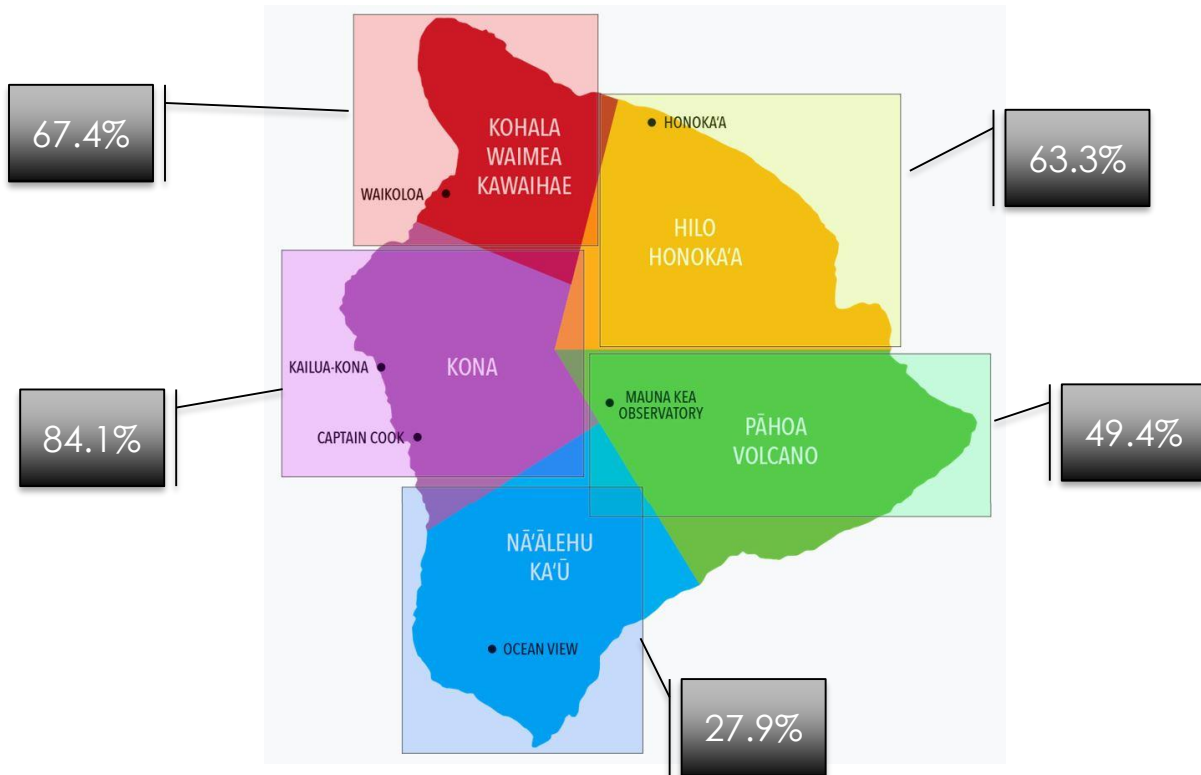
AREAS VISITED U.S. WEST



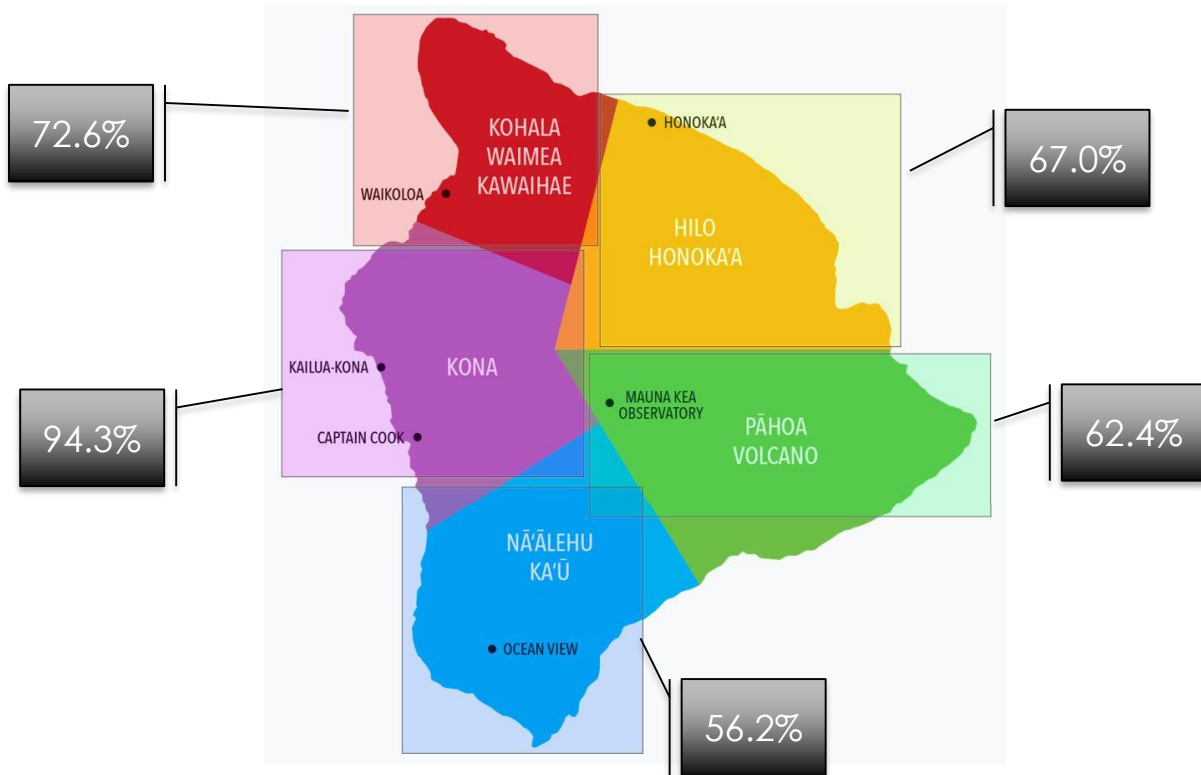
AREAS VISITED U.S. EAST



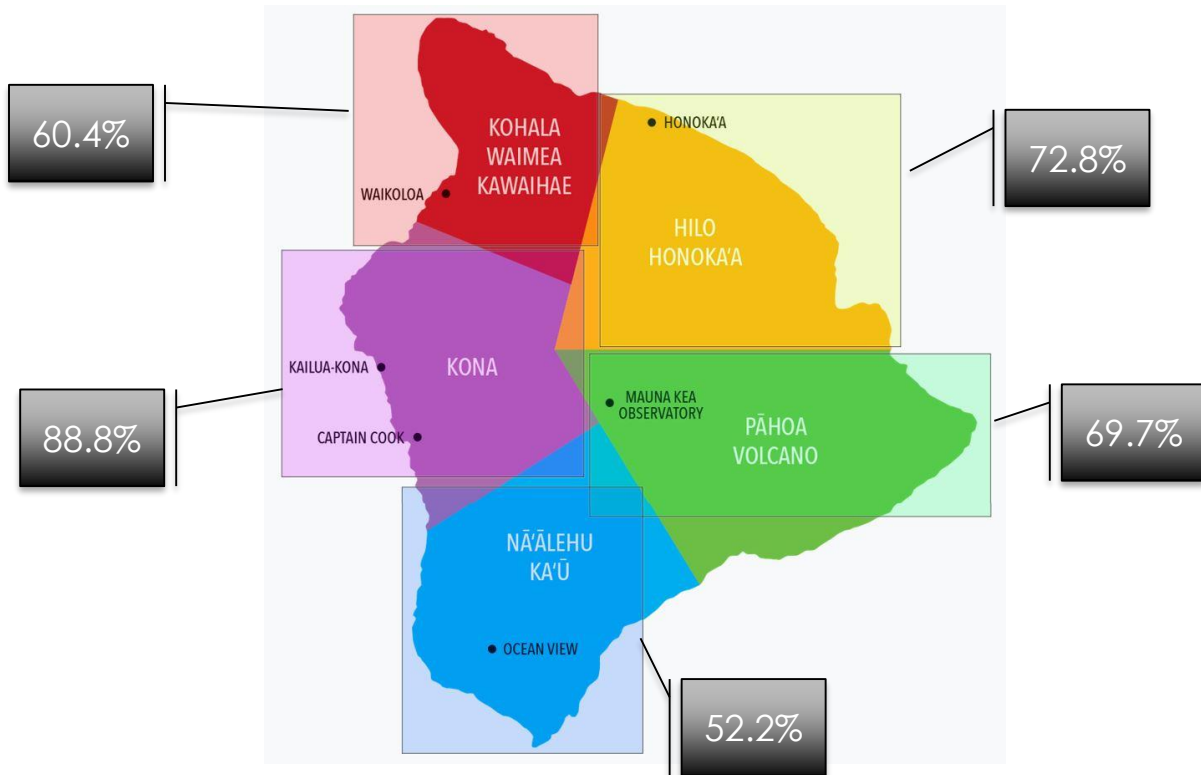
AREAS VISITED JAPAN



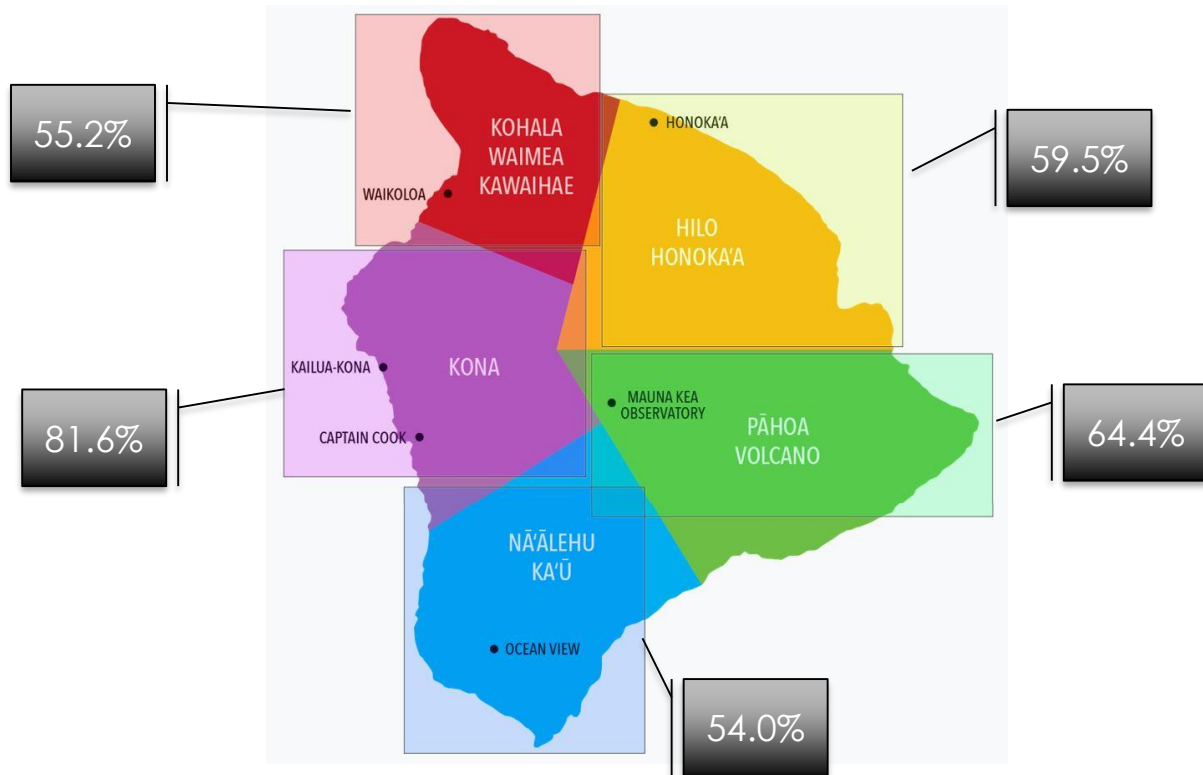
AREAS VISITED CANADA



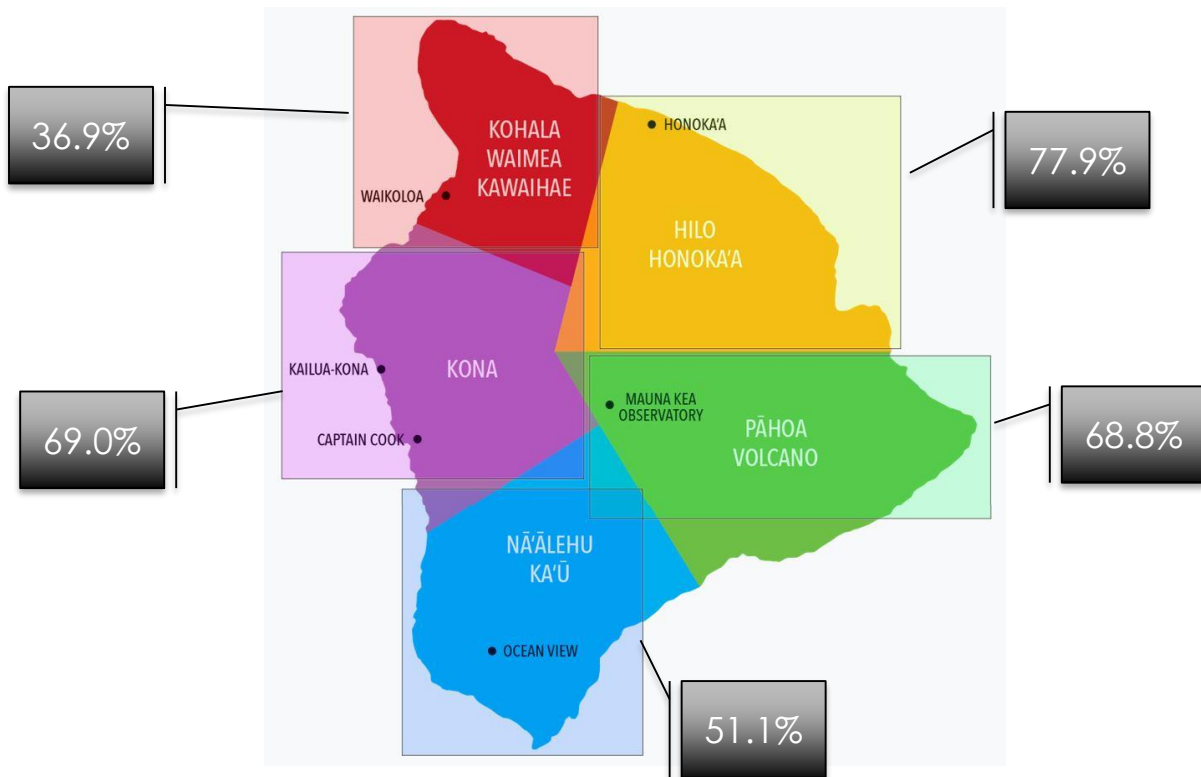
AREAS VISITED EUROPE



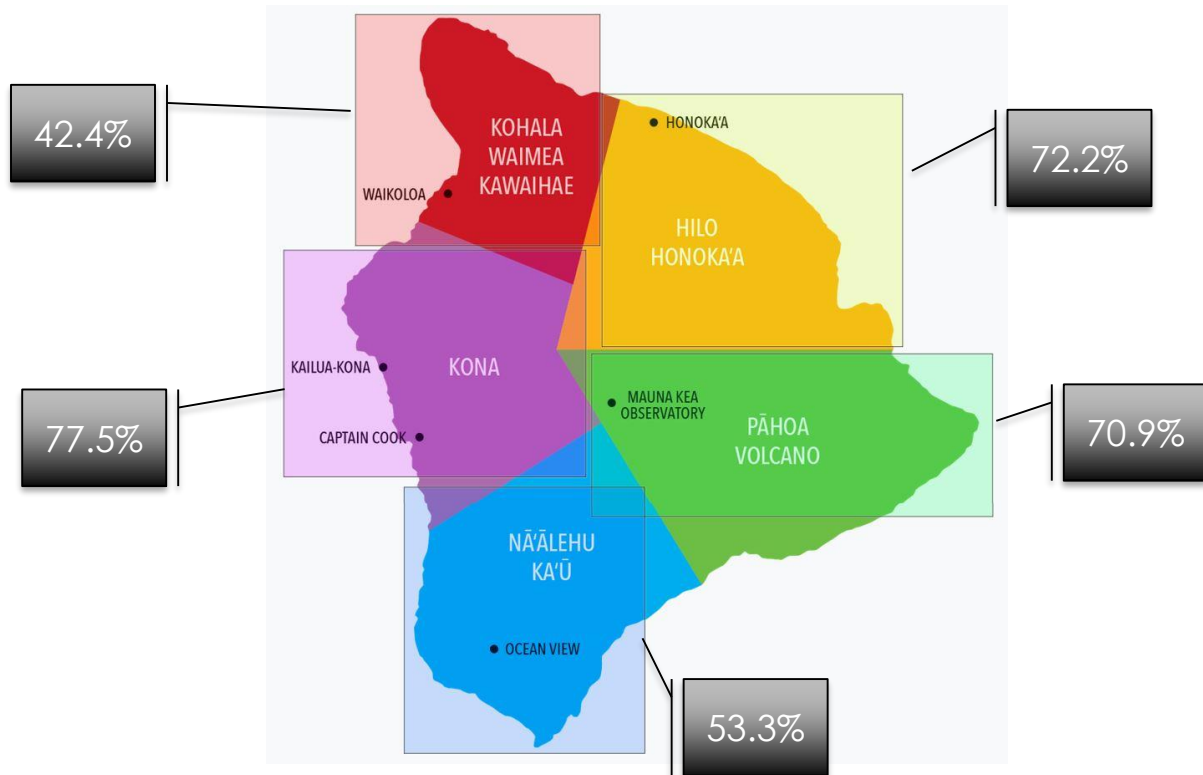
AREAS VISITED OCEANIA



AREAS VISITED CHINA

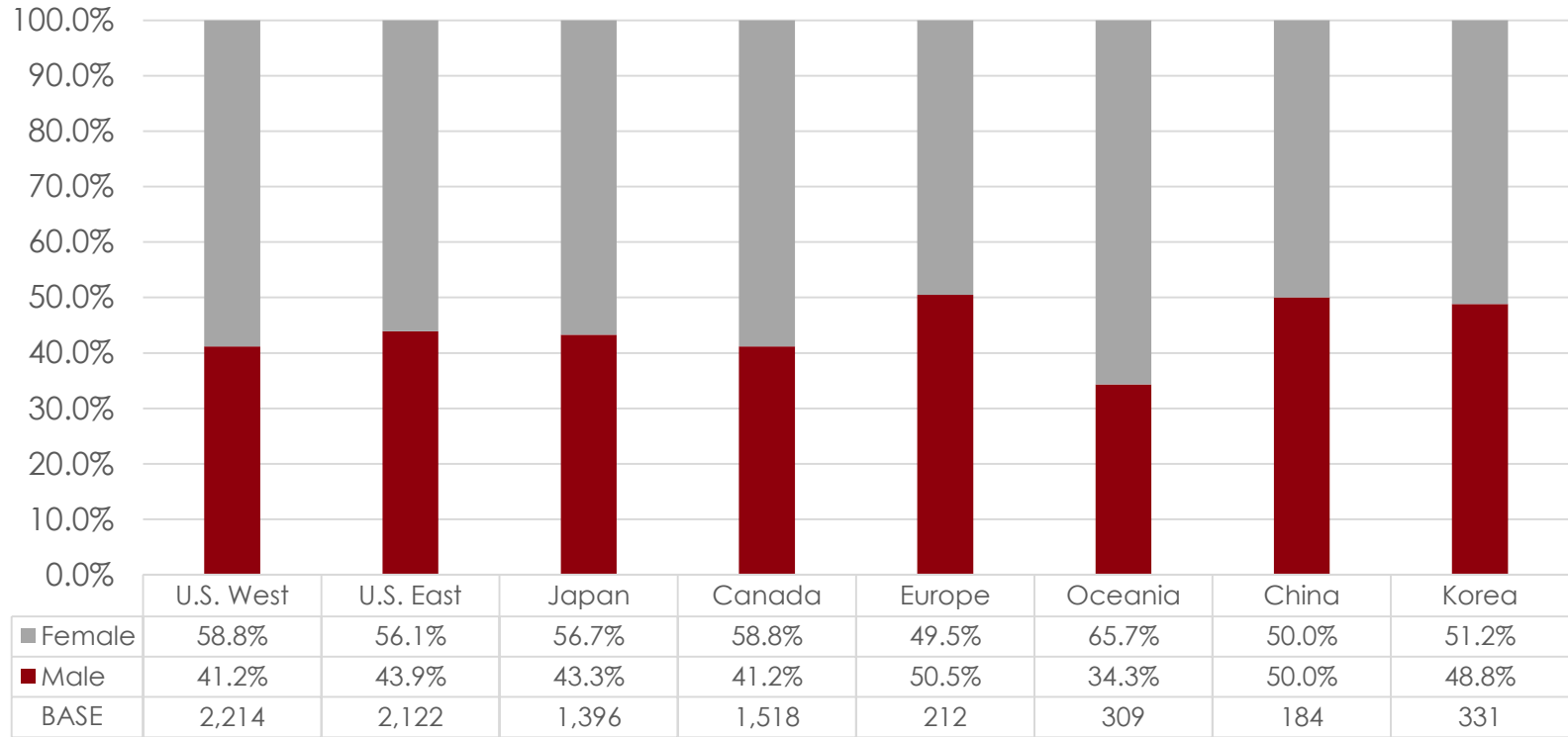


AREAS VISITED KOREA

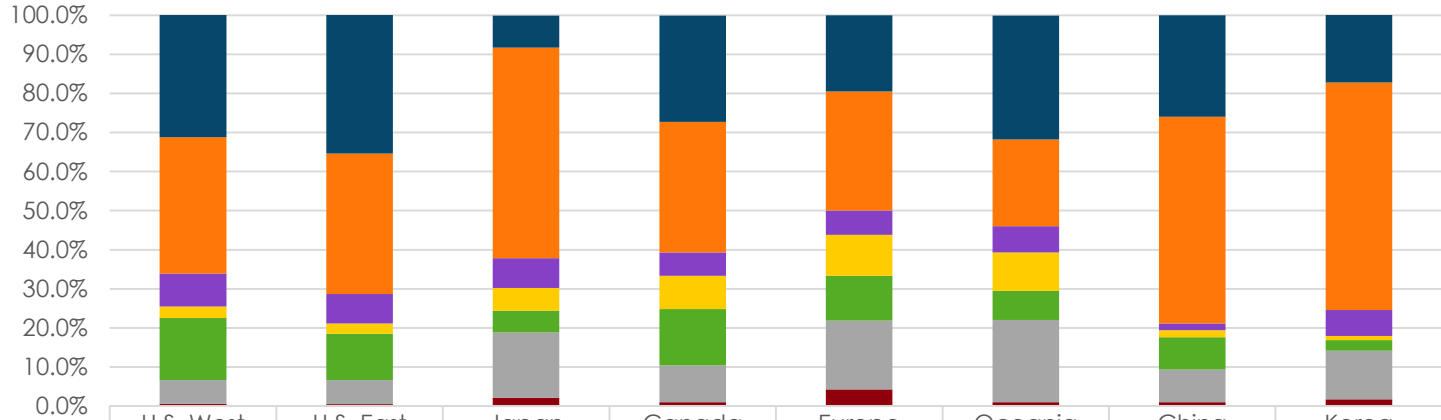


SECTION – VISITOR PROFILE

VISITOR PROFILE – GENDER



VISITOR PROFILE – EDUCATION



	U.S. West	U.S. East	Japan	Canada	Europe	Oceania	China	Korea
Post-Graduate	31.3%	35.5%	8.2%	27.2%	19.5%	31.7%	26.0%	17.3%
College Grad	34.9%	35.9%	53.9%	33.4%	30.5%	22.2%	52.9%	58.2%
Associate Degree	8.4%	7.6%	7.6%	6.0%	6.2%	6.7%	1.7%	6.7%
Vocational/ Tech	3.0%	2.6%	5.8%	8.5%	10.5%	9.8%	1.8%	1.0%
Some College	15.9%	11.9%	5.6%	14.4%	11.4%	7.5%	8.3%	2.7%
H.S. Grad	6.0%	6.1%	16.7%	9.4%	17.6%	21.0%	8.3%	12.5%
Some / No H.S.	0.6%	0.5%	2.1%	1.0%	4.3%	1.0%	1.0%	1.7%
BASE	2,210	2,119	1,395	1,518	210	309	184	331

VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Europe	Oceania
< \$40,000	6.7%	6.5%	7.3%	17.3%	10.6%
\$40,000 to \$59,999	7.1%	7.6%	7.7%	19.7%	9.3%
\$60,000 to \$79,999	10.1%	9.2%	10.6%	11.5%	14.1%
\$80,000 to \$99,999	9.8%	9.6%	11.5%	9.2%	10.5%
\$100,000 to \$124,999	12.6%	14.6%	14.3%	10.4%	13.5%
\$125,000 to \$149,999	12.9%	11.1%	12.5%	7.5%	13.2%
\$150,000 to \$174,999	9.5%	9.0%	8.4%	5.8%	7.1%
\$175,000 to \$199,999	7.0%	6.0%	7.0%	5.2%	6.1%
\$200,000 to \$249,999	8.1%	8.1%	8.1%	4.1%	7.6%
\$250,000 +	16.2%	18.4%	12.5%	9.3%	8.0%

VISITOR PROFILE – HOUSEHOLD INCOME (YEN)

	Japanese
< ¥3.5 million	19.6%
¥3.5 - ¥4.5 million	12.7%
¥4.5 - ¥5.5 million	10.0%
¥5.5 - ¥6.5 million	7.7%
¥6.5 - ¥7.5 million	5.1%
¥7.5 - ¥8.5 million	6.7%
¥8.5 - ¥10.0 million	9.5%
¥10.0 - ¥15.0 million	16.5%
¥15.0 - ¥20.0 million	5.4%
¥20.0 million +	6.8%

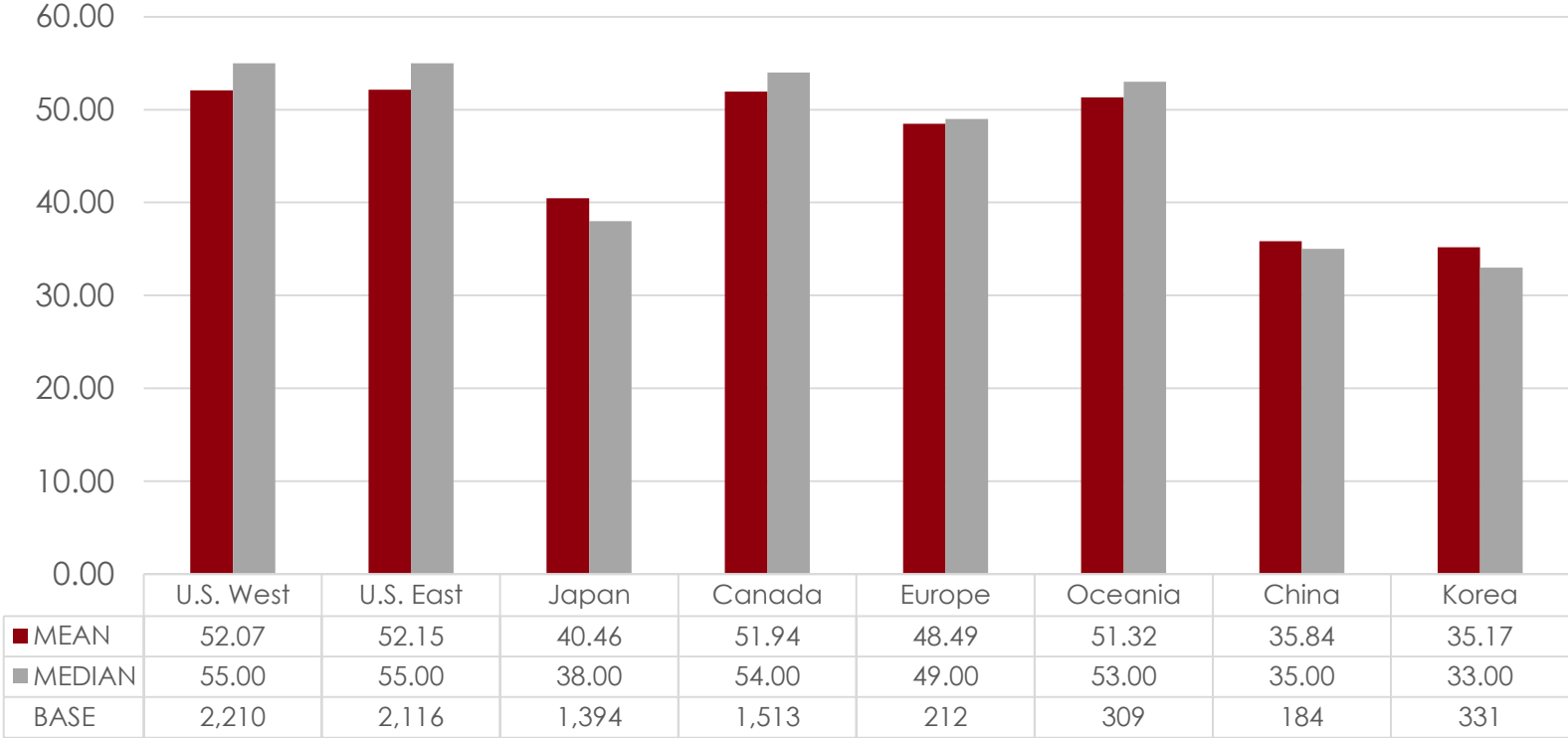
VISITOR PROFILE – HOUSEHOLD INCOME (KOREAN WON)

	Korean
< ₩16,305,000	19.1%
₩16,305,000-21,171,999	7.3%
₩27,174,000-38,041,999	8.0%
₩38,044,000-48,911,999	9.7%
₩48,912,000-59,781,999	9.6%
₩59,782,000-70,652,999	8.3%
₩70,653,000-81,520,999	7.9%
₩81,521,000-92,390,999	6.1%
₩92,391,000-103,259,999	6.0%
₩103,260,000+	18.0%

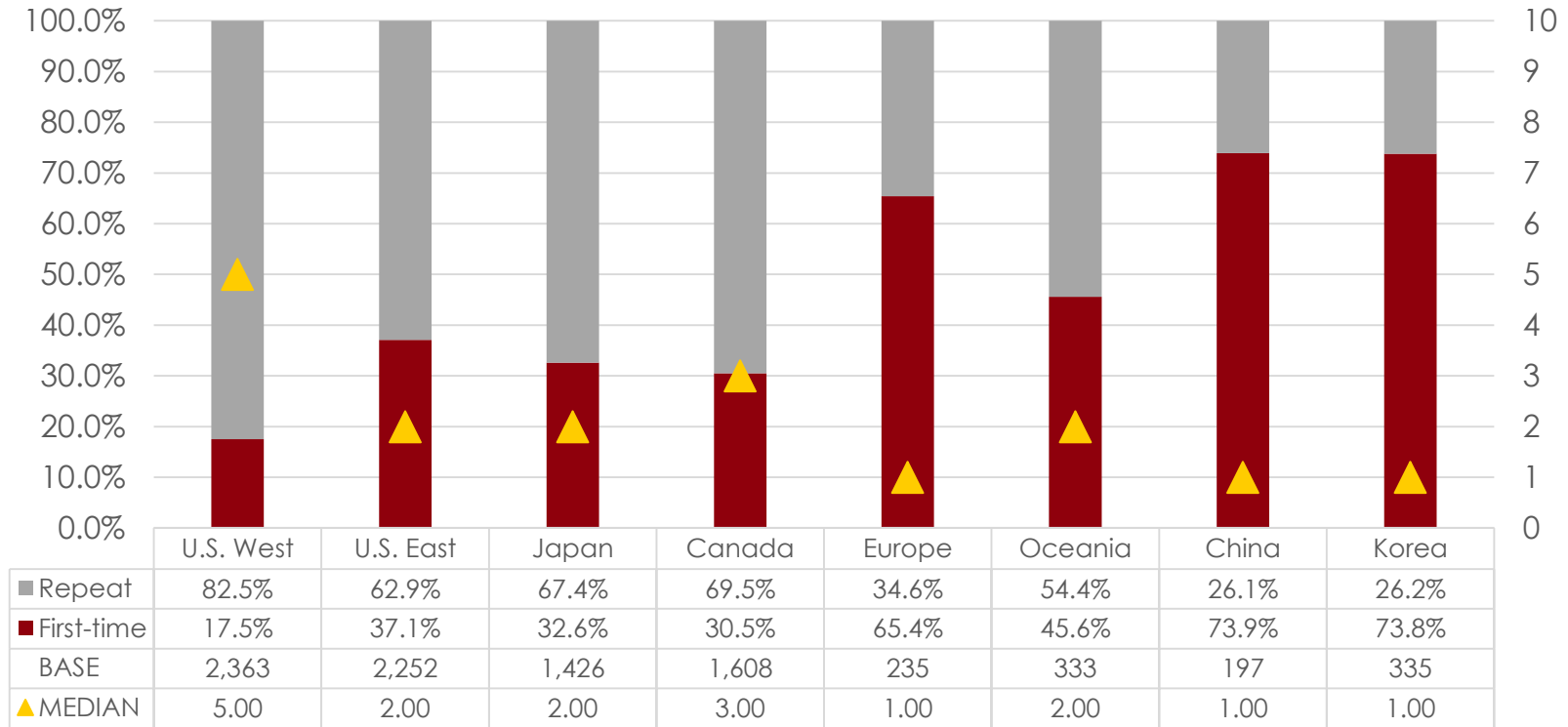
VISITOR PROFILE – HOUSEHOLD INCOME (Chinese Yuan)

	Chinese
< ¥250,799	22.9%
¥250,800 - ¥376,099	24.3%
¥376,100 - ¥501,399	14.9%
¥501,400 - ¥626,799	9.7%
¥626,800 - ¥783,499	9.0%
¥783,500 - ¥940,199	4.1%
¥940,200 - ¥1,096,899	2.6%
¥1,096,900 - ¥1,253,599	3.5%
¥1,253,600 - ¥1,560,799	2.2%
¥1,560,800+	6.8%

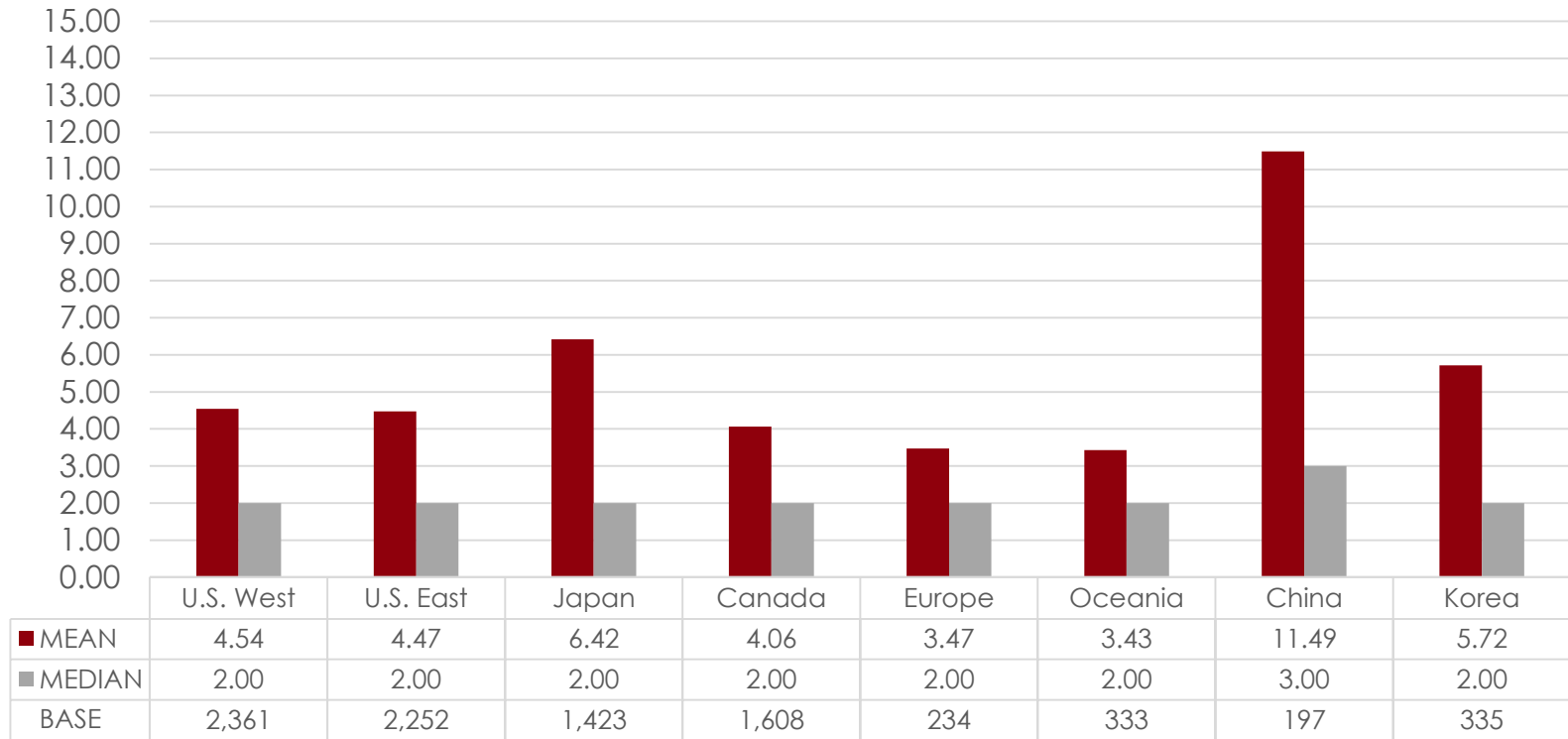
VISITOR PROFILE – AGE



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
Spouse	60.5%	62.2%	49.6%	64.9%	44.7%	61.8%	44.4%	55.8%
Other adult family	27.3%	27.2%	26.3%	27.4%	19.6%	29.7%	23.8%	29.0%
Friends	19.5%	19.9%	23.7%	16.8%	17.4%	13.6%	22.5%	11.4%
Child <18	20.4%	15.0%	15.9%	25.9%	9.4%	27.7%	24.5%	14.4%
Alone	9.6%	9.9%	6.1%	6.0%	19.6%	8.4%	8.1%	6.0%
Girlfriend/ boyfriend	7.4%	6.3%	4.2%	6.9%	13.2%	5.3%	8.1%	2.6%
Same-sex partner	1.8%	1.2%	0.4%	1.5%	0.4%	0.6%	1.4%	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.

MMA	Completed	Margin of Error \pm
US West	950	3.18
US East	1,162	2.87
Japan	946	3.19
Canada	733	3.62
Europe	142	8.22
Oceania	320	5.48
China	182	7.26
Korea	310	5.57
All MMAs	4,745	1.42

*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.

MMA	Completed	Margin of Error \pm
US West	502	4.37
US East	595	4.02
Japan	19	22.48
Canada	289	5.76
Europe	67	11.97
Oceania	30	17.89
China	6	40.01
Korea	9	32.67
All MMAs	1,517	2.52

*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.

MMA	Completed	Margin of Error \pm
US West	654	3.83
US East	946	3.19
Japan	23	20.43
Canada	610	3.97
Europe	95	10.05
Oceania	42	15.12
China	40	15.50
Korea	48	14.15
All MMAs	2,458	1.98

*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.

MMA	Completed	Margin of Error \pm
US West	686	3.74
US East	723	3.64
Japan	600	5.14
Canada	364	4.00
Europe	85	10.63
Oceania	33	17.06
China	77	11.17
Korea	51	13.72
All MMAs	2,619	1.91

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