

VISITOR SATISFACTION STUDY Q2 2023

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

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Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 2, 2023 report included survey results from: 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, Oceania, Korea. Samples collected for China were too limited to report.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	1,684	2.39	17.74
U.S. East	1,799	2.31	19.07
Japan	140	8.28	19.07
Canada	884	3.30	21.36
Oceania	414	4.82	18.23
China	37	16.11	4.74
Korea	529	4.26	43.77
All visitor markets	5,487	1.32	17.14

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-Flight and International Departure Intercept surveys. Selected U.S. visitors were sent an email invitation with a link to complete the survey online. Intercept surveys were also conducted by trained interviewers with departing visitors from Korea and Japan at the Daniel K. Inouye International Airport in Honolulu.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 2, 2023. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

Note: Some results are presented with very small sample sizes that produce statistics with sample error estimates greater than 10 points. Please exercise caution in interpreting results based on small bases.

Effect of COVID-19 Pandemic

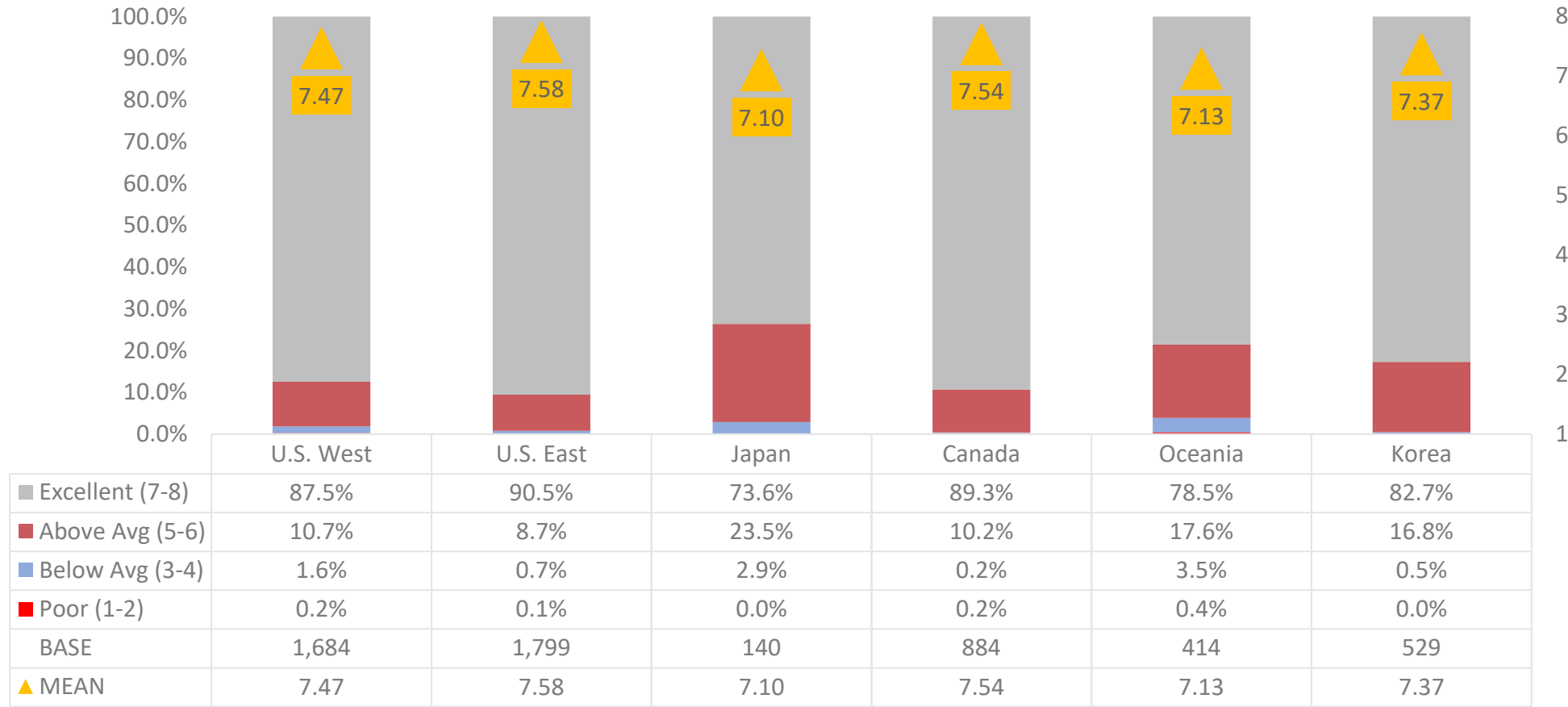
COVID-19 Travel Restrictions

At the time of the Quarter 2, 2023 VSAT Survey, there were no travel requirements for visitors who arrived to Hawai'i on domestic flights. In accordance with U.S. international arrival rules, travelers from foreign countries were no longer required to have a negative pre-travel test, regardless of vaccination status. However, foreign visitors (non-U.S. citizens) who arrived on international flights to Hawai'i were still required to show proof of full vaccination. There continued to be reduced direct flights to Hawai'i from Japan, Korea, and Oceania compared to pre-pandemic 2019 levels. There have been no direct flights from China since service ended in February 2020.

Section 1 – Visitor Satisfaction

Satisfaction - State of Hawai'i by Visitor Market

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

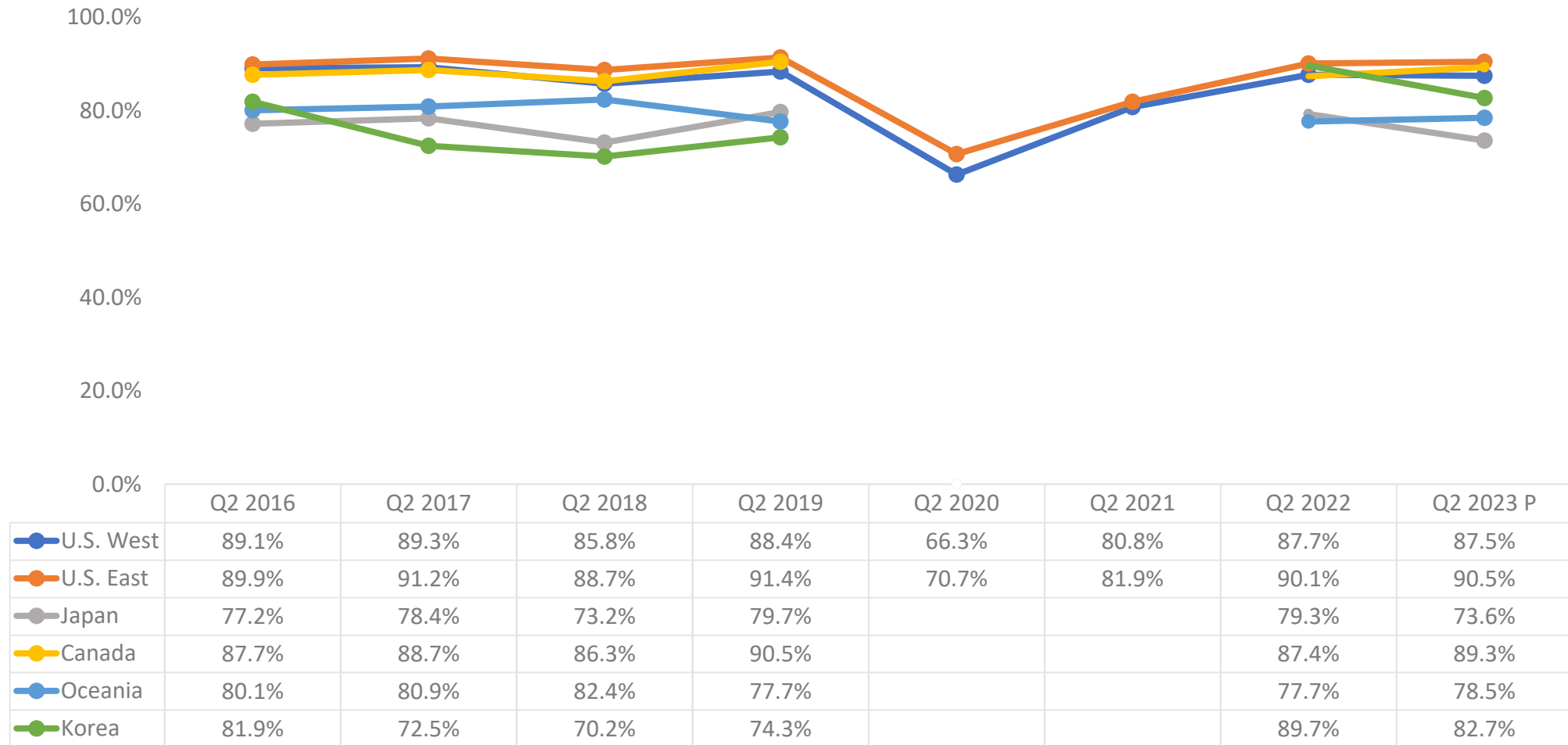


Satisfaction – State of Hawai‘i by Visitor Market

- **Gender:** Female respondents from U.S. West and U.S. East gave higher satisfaction scores than male respondents from these markets.
- **Age:** Younger travelers (18-34) from U.S. West and U.S. East gave statistically higher satisfaction scores compared to senior visitors (65+) from these visitor markets.
- **Islands visited:** Visitors from U.S. West whose trip consisted of visiting a single island were more satisfied with their stay compared to those who visited multiple islands during their visit. Conversely, Japanese visitors who stayed on multiple islands during their trip gave higher satisfaction scores compared to those whose trip consisted of visiting just a single island.

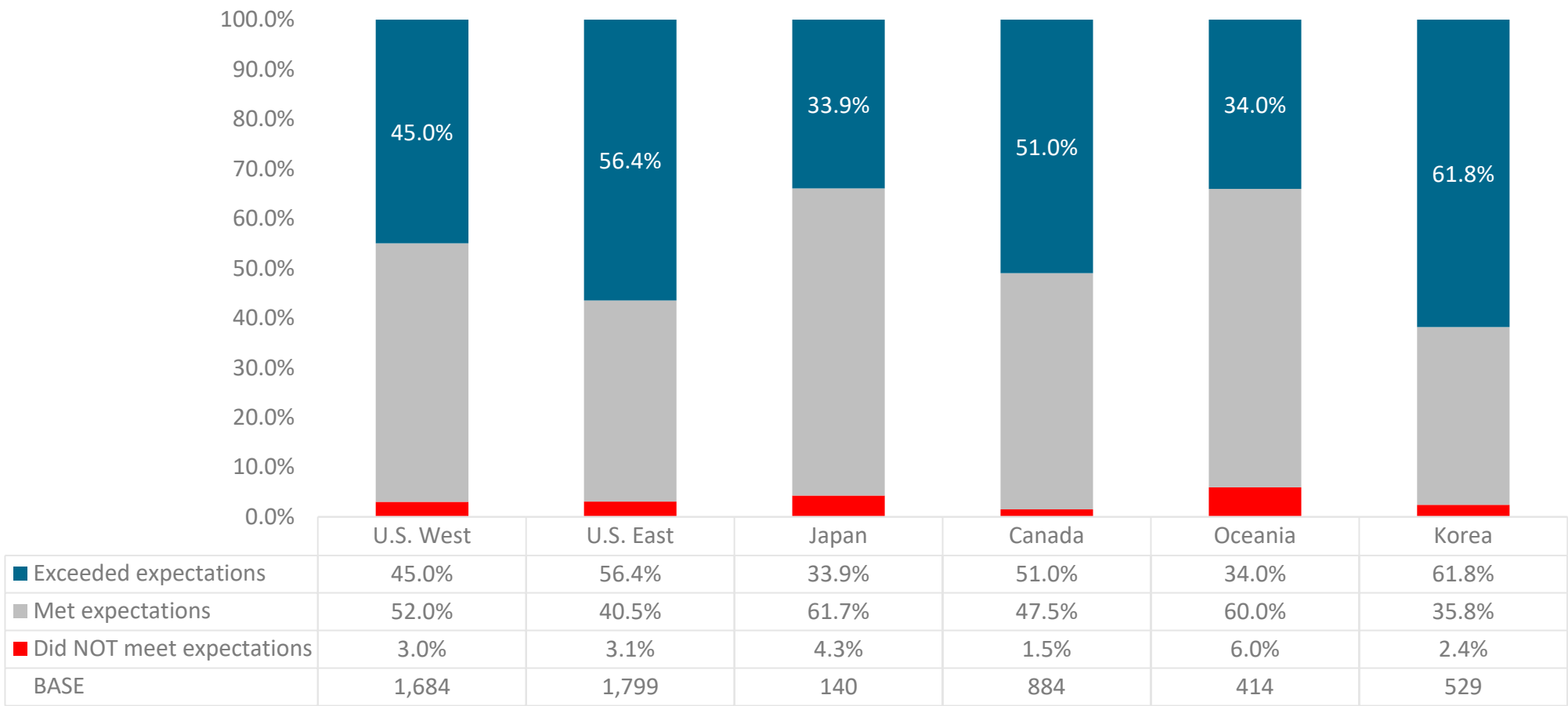
Satisfaction - State of Hawai'i by Visitor Market

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



P= Preliminary Data

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

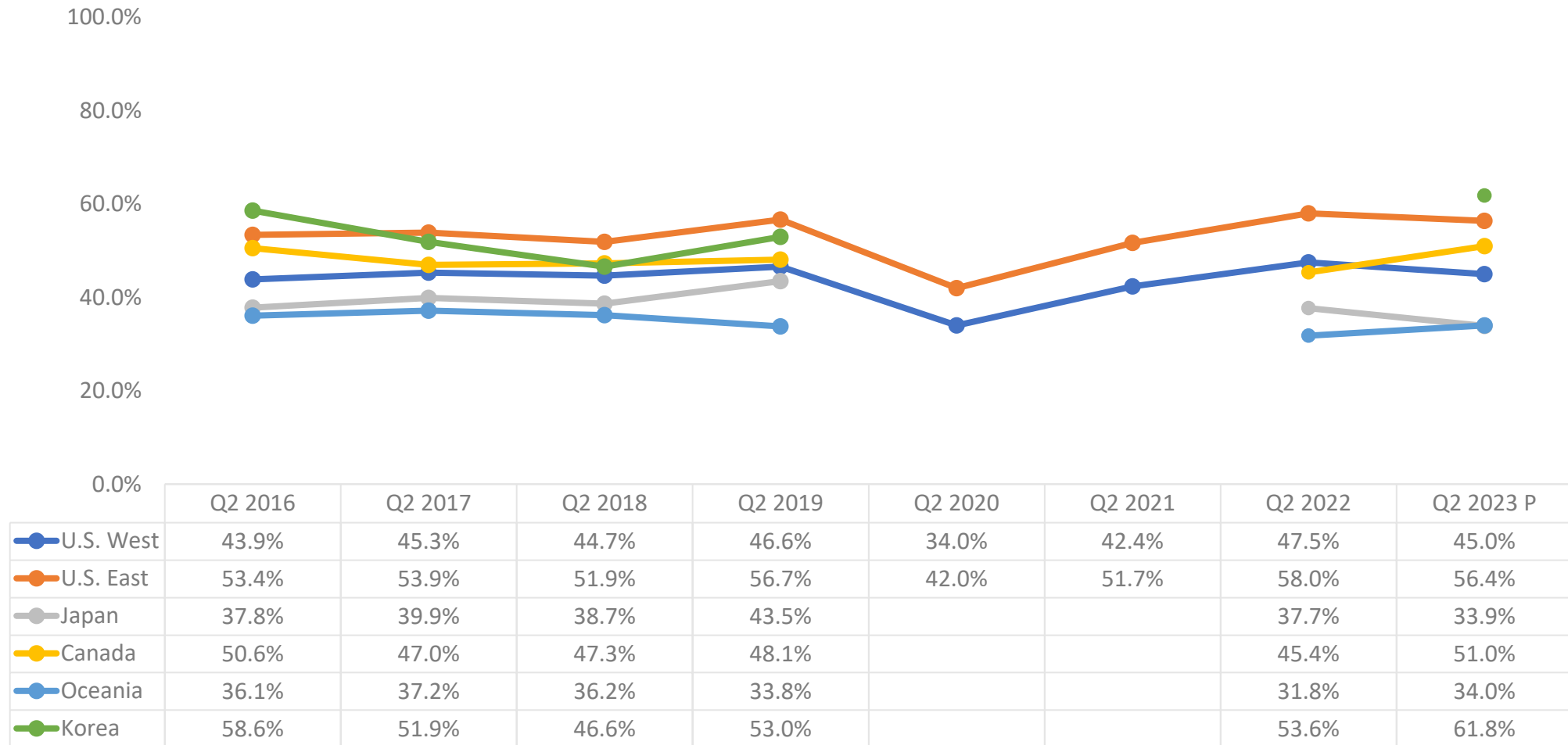


SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher mean scores than repeat visitors: U.S. West, U.S. East, Oceania, Japan, and Canada.
- ***Age:*** Younger respondents (between 18 – 34 years old) from U.S. West, U.S. East, Japan, and Canada were more likely to respond that their trip exceeded expectations compared to visitors from these markets in other age groups. Agreement with this sentiment tended to decline with age.
- ***Gender:*** Female visitors from U.S. West and U.S. East gave higher mean satisfaction scores compared to male visitors.
- ***Islands visited:*** Visitors from Japan whose stay consisted of visiting multiple islands were more likely to state that their trip exceeded their expectations compared to those whose trip was limited to visiting a single island.

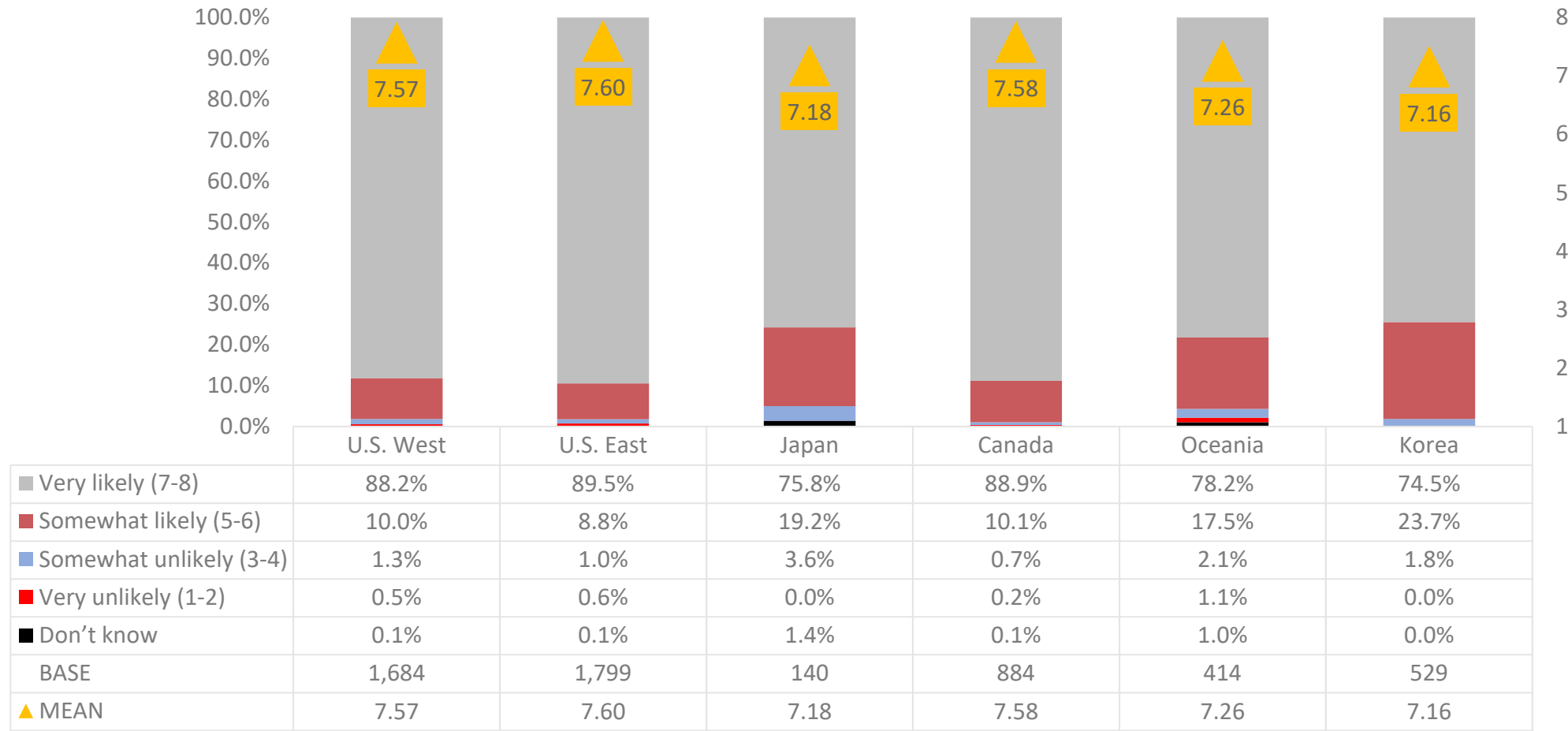
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



BRAND/ DESTINATION - ADVOCACY

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



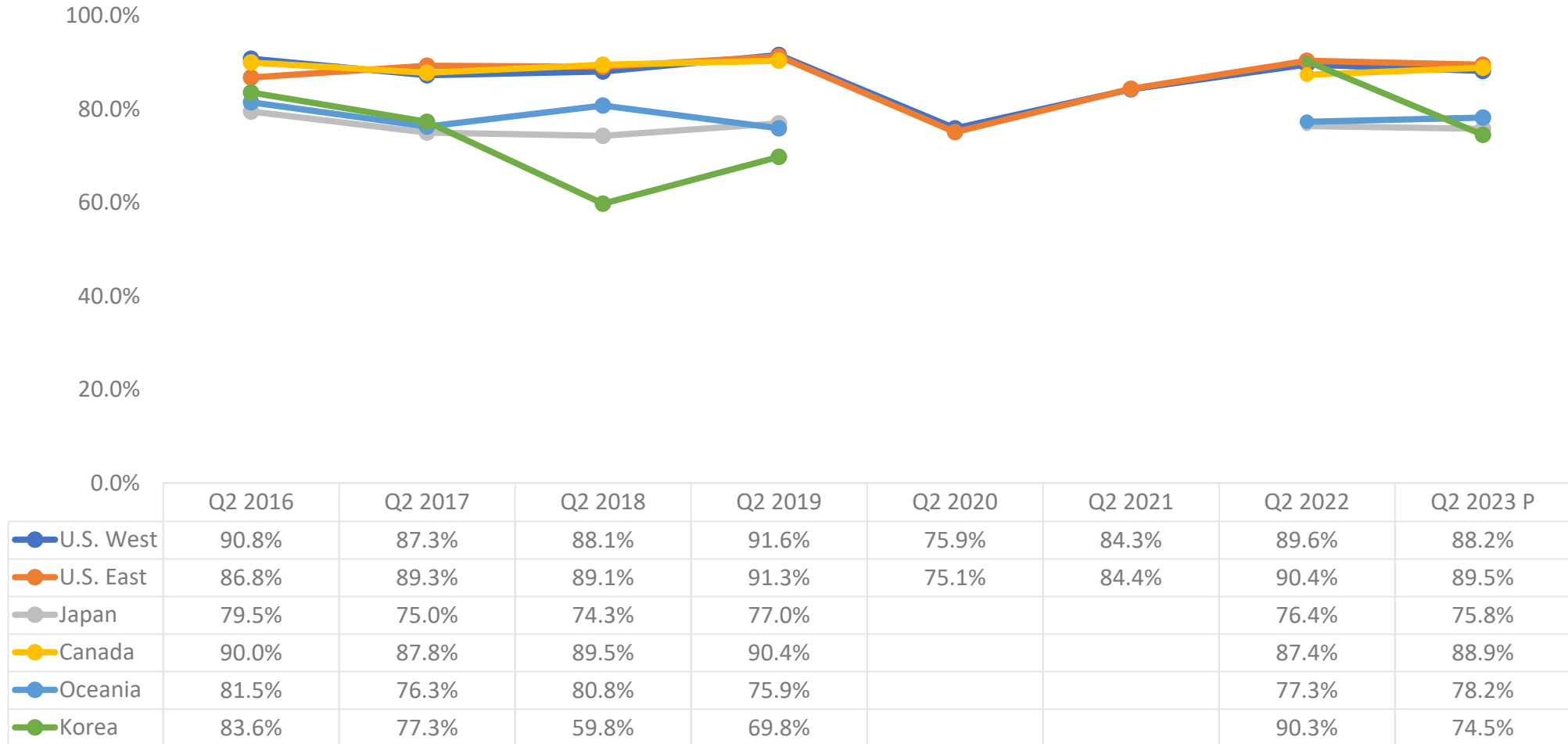
BRAND/ DESTINATION – ADVOCACY

- ***Islands visited:*** Those from U.S. West whose trip consisted of visiting a single island gave higher mean advocacy scores compared to those who visited multiple islands during their stay.
- ***Gender:*** Females from U.S. West and U.S. East were more likely to recommend the state to others than males from these visitor markets.

BRAND/ DESTINATION - ADVOCACY

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

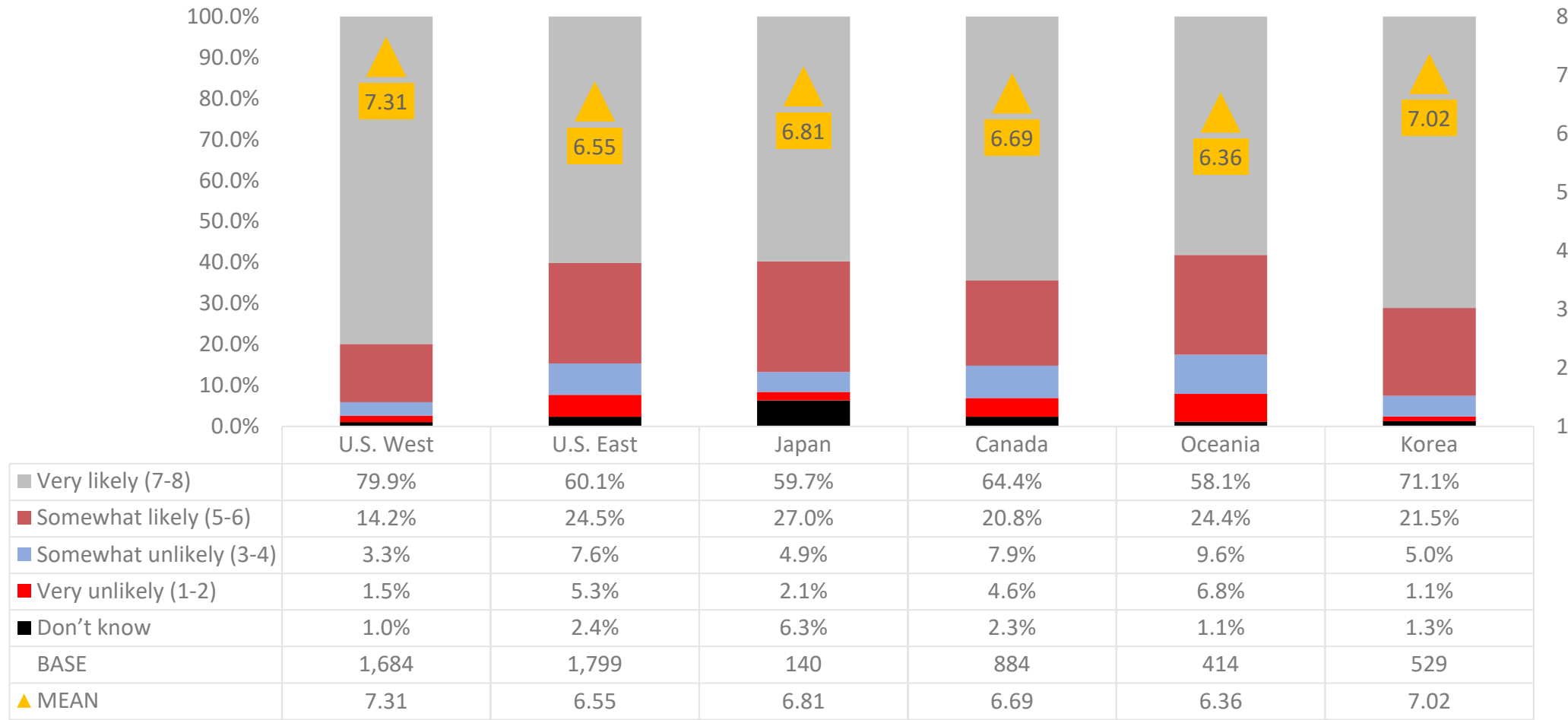
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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



LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets expressed a greater likelihood of returning to the state than first-time visitors: U.S. West, U.S. East, Japan, and Canada.
- ***Gender:*** Females from U.S. West expressed a stronger likelihood to return than males from this visitor market.
- ***Household income (U.S.\$):*** More affluent visitors from U.S. West and U.S. East expressed a greater likelihood of returning to the state than less affluent travelers from these visitor markets.
- ***Islands visited:*** Visitors from U.S. West, U.S. East, and Canada whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than those who visited multiple islands during their stay.
- ***Age:*** Travelers under the age of 50 from U.S. East were more likely to indicate a likelihood to return compared to seniors (65+).

LIKELIHOOD OF RETURN VISIT

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

100.0%

80.0%

60.0%

40.0%

20.0%

0.0%

	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	81.6%	72.1%	73.8%	83.1%	85.9%	79.0%	80.4%	79.9%
U.S. East	54.6%	54.3%	59.0%	61.2%	75.4%	63.3%	62.3%	60.1%
Japan	55.8%	55.1%	59.3%	62.9%			82.0%	59.7%
Canada	65.0%	61.0%	66.0%	70.0%			69.4%	64.4%
Oceania	58.0%	50.9%	60.6%	54.0%			67.9%	58.1%
Korea	78.4%	72.4%	58.4%	65.6%			87.9%	71.1%

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q2 2022	Q2 2023 P
56.0% Too expensive	61.6% Too expensive
36.4% Poor value	42.5% Want to go someplace new
32.0% Want to go someplace new	34.3% Poor value
26.6% Too commercialized/ overdeveloped	31.2% Too crowded/ congested/ traffic
25.3% Too crowded/ congested/ traffic	17.1% Too commercialized/ overdeveloped
19.4% No reason to return/ nothing new	15.2% Five years is too soon
14.6% Unfriendly people/ felt unwelcome	13.1% Unfriendly people/ felt unwelcome
	11.1% No compelling reason to return

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q2 2022	Q2 2023 P
55.0% Too expensive	59.6% Too expensive
41.9% Flight too long	44.5% Flight too long
39.7% Want to go someplace new	36.8% Want to go someplace new
19.4% Five years is too soon	21.0% Five years is too soon
14.0% Poor value	16.1% Poor value
13.3% Too crowded/ congested/ traffic	15.1% Too crowded/ congested/ traffic
11.8% Other financial obligations	10.4% Other financial obligations
10.3% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q2022*	Q2 2023 P**
50.0% Too expensive	79.3% Too expensive
50.0% Poor value	31.3% Want to go someplace new
50.0% Other financial obligations	25.8% Five years is too soon
50.0% No compelling reason to return	20.7% Other financial obligations
50.0% Overrated/ did not meet expectations	15.8% Poor value
	10.6% Poor health/ age
	10.3% Too crowded/ congested/ traffic
	10.3% No compelling reason to return

*Caution small base (n=2) in Q2 2022.

**Caution small base (n=19) in Q2 2023.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q2 2022	Q2 2023 P
60.3% Too expensive	54.7% Too expensive
44.9% Want to go someplace new	41.2% Want to go someplace new
36.4% Flight too long	35.7% Flight too long
22.0% Poor value	19.0% Five years is too soon
21.1% Five years is too soon	15.7% Poor value
18.2% Too crowded/ congested/ traffic	13.8% Other financial obligations
14.1% Other financial obligations	10.4% Too crowded/ congested/ traffic
13.5% No compelling reason to return	
11.0% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q2 2022*	Q2 2023 P
51.6% Too expensive	50.7% Too expensive
36.4% Want to go someplace new	36.5% Want to go someplace new
33.4% Poor value	27.1% Poor value
24.0% No compelling reason to return	22.5% Too commercialized/ overdeveloped
18.9% Too commercialized/ overdeveloped	17.2% No compelling reason to return
17.8% Too crowded/ congested/ traffic	12.3% Five years is too soon
15.6% Poor service	10.6% Too crowded/ congested/ traffic
12.3% Flight too long	10.0% Flight is too long

*Caution small base (n=37).

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q2 2022*	Q2 2023 P**
100.0% Too expensive	78.0% Too expensive
100.0% Want to go someplace new	36.7% Flight too long
100.0% Poor value	35.6% Poor value
100.0% Too crowded/ congested/ traffic	26.0% No compelling reason to return
100.0% Five years is too soon	24.8% Other financial obligations
	24.3% Five years is too soon
	21.5% Want to go someplace new
	13.0% Too crowded/ congested/ traffic

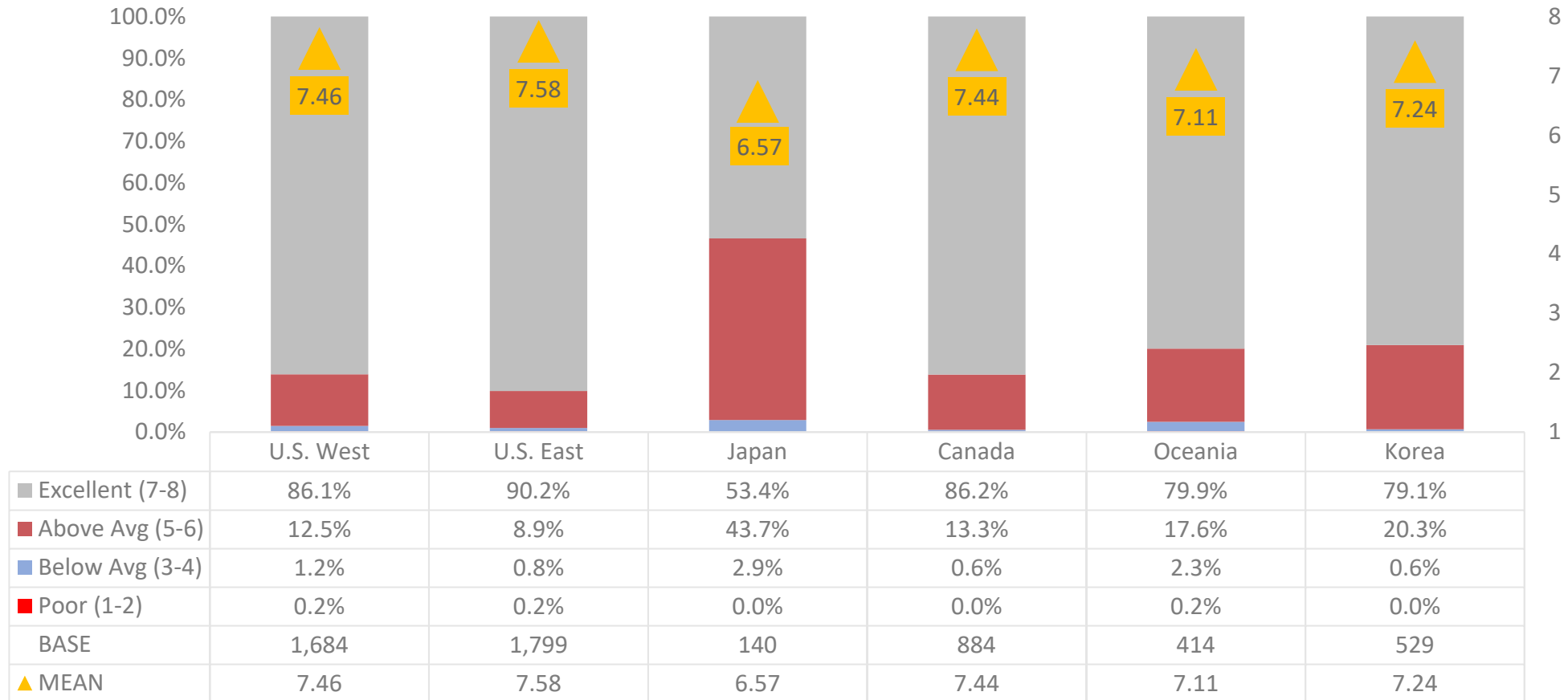
*Caution only 1 Korean visitors responded to this question in 2022.

**Caution small base (n=39).

P= Preliminary Data

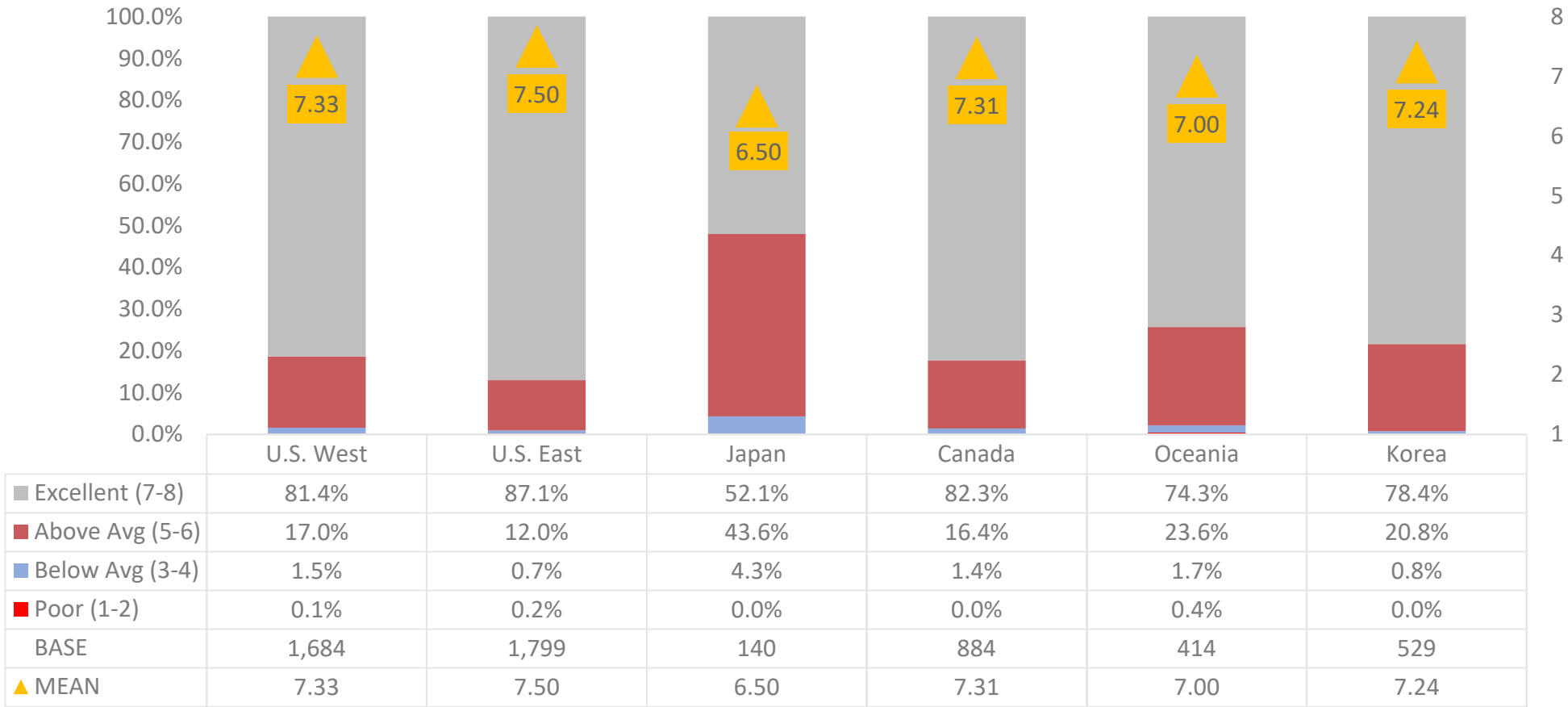
OFFERING A VARIETY OF EXPERIENCES

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



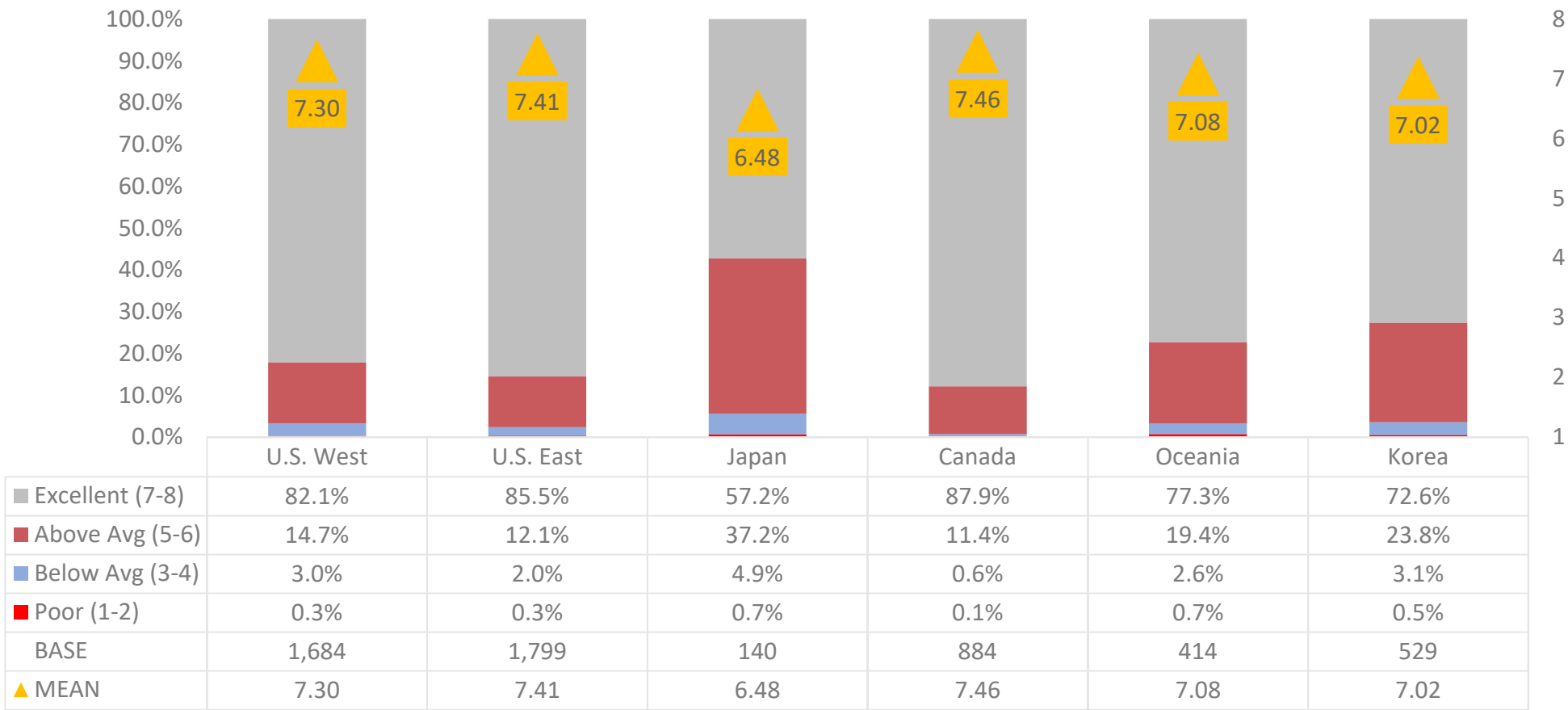
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



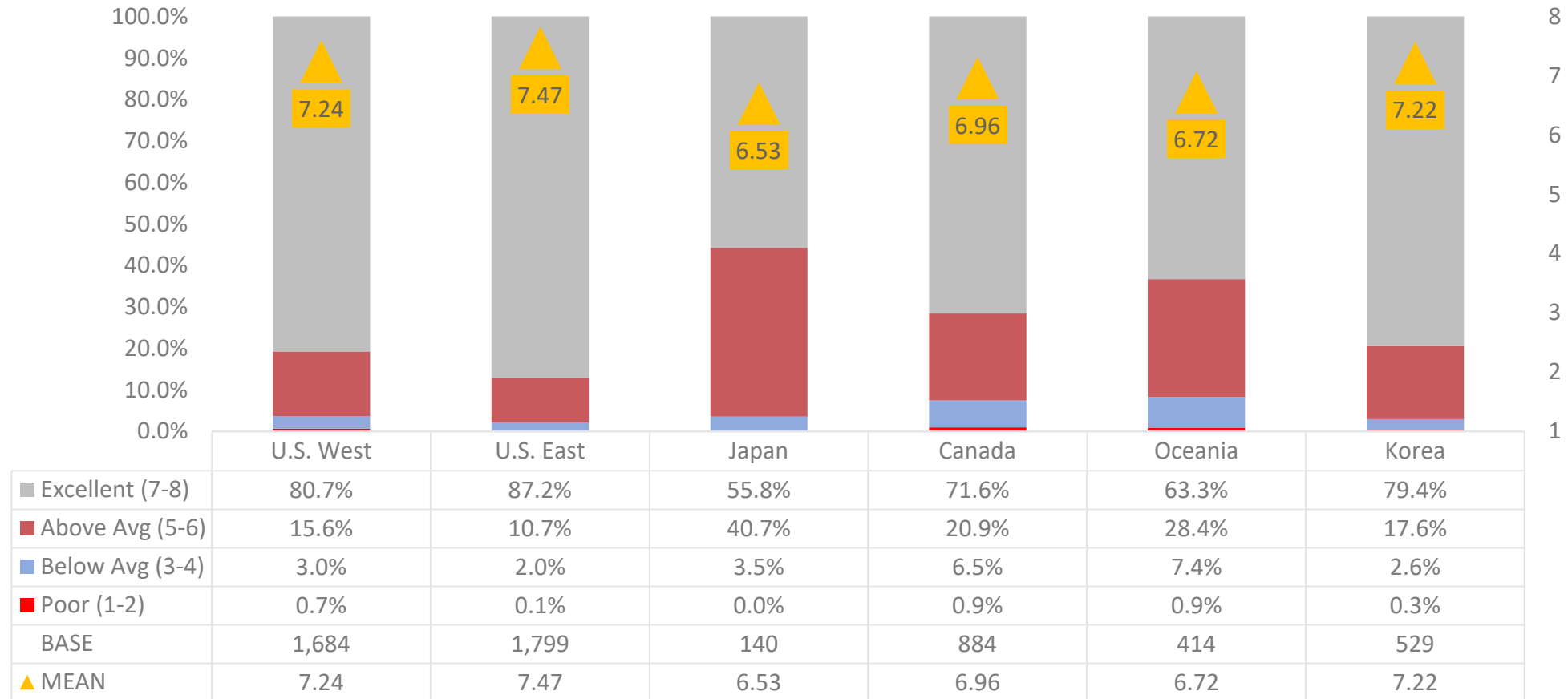
SAFE AND SECURE DESTINATION

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



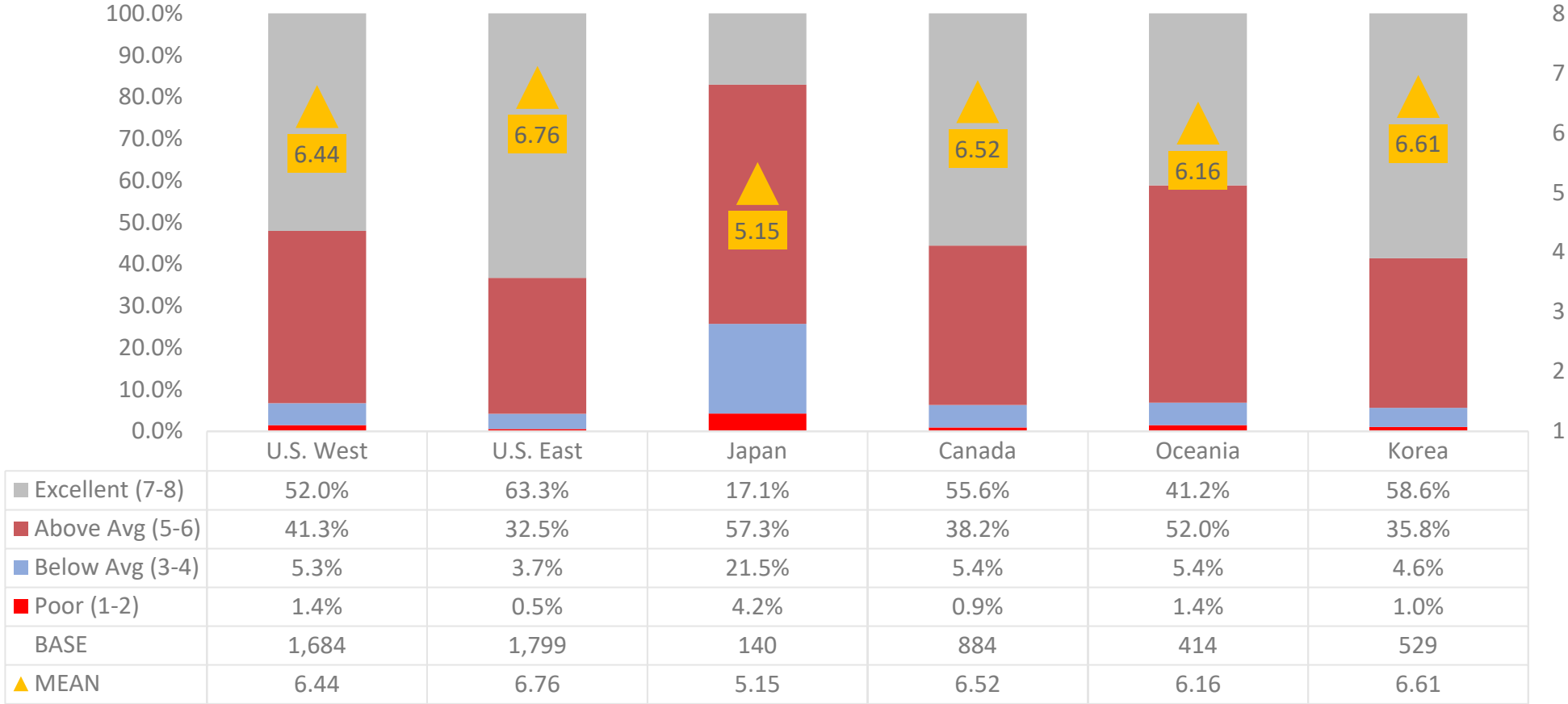
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Section 2 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.6%	99.2%	97.1%	98.1%	92.6%	100.0%
On own (self-guided)	83.3%	81.3%	72.8%	81.5%	46.3%	80.7%
Helicopter ride/ airplane tour	3.5%	7.3%	0.7%	4.9%	3.1%	4.1%
Boat tour/ submarine ride/ whale watching	26.8%	31.7%	7.8%	25.7%	16.6%	30.2%
Visit towns/communities	54.1%	54.1%	36.0%	52.1%	27.0%	36.2%
Private limousine/ van tour/ tour bus	7.9%	17.0%	5.0%	11.5%	26.0%	10.2%
Scenic views/ natural landmarks	60.1%	71.3%	19.3%	65.7%	45.5%	59.1%
Movie/ TV/ film location tours	5.3%	7.7%	3.5%	5.2%	8.9%	18.9%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	96.6%	97.3%	94.2%	97.9%	92.2%	98.9%
Beach/ sunbathing	85.6%	87.3%	66.1%	87.5%	77.1%	81.5%
Bodyboarding	11.5%	7.3%	2.2%	10.0%	3.0%	2.8%
Standup paddle boarding	5.2%	5.1%	4.2%	4.3%	3.2%	3.8%
Surfing	7.3%	6.2%	8.6%	9.5%	5.5%	13.0%
Canoeing/ kayaking	6.2%	5.9%	1.5%	6.2%	2.4%	5.5%
Swim in the ocean	68.8%	67.7%	31.4%	72.7%	61.2%	52.6%
Snorkeling	46.7%	43.7%	13.5%	47.9%	24.4%	56.6%
Freediving	2.4%	1.2%	0.7%	1.9%	0.0%	1.9%
Windsurfing/ Kitesurfing	0.2%	0.0%	0.0%	0.1%	0.0%	0.5%
Jet skiing/ Parasailing	1.6%	2.1%	1.4%	0.8%	0.5%	2.0%
Scuba diving	2.3%	2.3%	0.7%	2.4%	1.3%	2.3%
Fishing	2.3%	3.6%	0.7%	1.8%	0.8%	0.5%
Golf	6.0%	6.5%	5.1%	7.0%	3.6%	3.5%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	96.6%	97.3%	94.2%	97.9%	92.2%	98.9%
Running/ jogging/ fitness/ walking	26.8%	22.7%	19.5%	28.5%	20.9%	12.2%
Cycling	3.0%	3.4%	3.5%	4.4%	1.5%	2.3%
Spa	8.3%	8.6%	4.3%	4.7%	6.2%	5.6%
Hiking	45.1%	50.0%	20.6%	50.3%	19.4%	23.4%
Backpacking/ camping	1.5%	1.6%	0.7%	2.8%	0.3%	1.5%
Agritourism	12.0%	15.9%	2.8%	10.6%	6.9%	16.8%
Sports event or tournament	0.8%	0.8%	0.7%	1.2%	1.5%	0.9%
Parks/ botanical gardens	36.9%	44.6%	17.3%	41.6%	29.0%	18.7%
Waterparks	1.6%	1.4%	1.4%	1.6%	0.2%	2.7%
Mountain tubing/ waterfall rappel	2.8%	2.4%	0.0%	2.1%	0.4%	0.8%
Zip-lining	4.6%	4.5%	2.2%	1.9%	1.9%	1.6%
Skydiving	0.2%	0.2%	0.7%	0.2%	0.0%	1.3%
All-terrain vehicle (ATV)	3.4%	4.3%	0.7%	2.6%	2.6%	9.2%
Horseback riding	1.6%	1.8%	2.8%	1.3%	0.0%	0.5%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	99.3%	98.5%	97.8%	98.0%	99.6%	99.0%
Lunch/ sunset/ dinner/ evening cruise	22.3%	26.8%	10.7%	23.1%	16.2%	34.4%
Live music/ stage show	28.8%	37.0%	13.6%	30.2%	20.8%	11.8%
Nightclub/ dancing/ bar/ karaoke	6.9%	8.4%	4.3%	6.8%	5.6%	3.5%
Fine dining	45.9%	47.1%	30.8%	40.3%	26.8%	53.3%
Family restaurant	61.5%	58.3%	23.1%	58.0%	69.7%	47.1%
Fast food	36.1%	33.9%	43.5%	41.8%	52.7%	59.8%
Food truck	42.5%	45.4%	20.1%	39.7%	33.3%	66.6%
Café/ coffee house	51.4%	48.0%	48.1%	51.3%	61.6%	63.6%
Ethnic dining	27.8%	30.9%	7.2%	22.1%	12.6%	24.9%
Farm-to-table cuisine	17.2%	17.3%	9.5%	14.6%	3.9%	3.1%
Prepared own meal	47.1%	38.4%	25.5%	50.0%	24.8%	11.2%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.8%	96.9%	97.8%	97.6%	98.2%	98.4%
Malls/ department stores	41.0%	43.2%	79.1%	53.0%	66.5%	77.2%
Designer boutiques	18.4%	17.7%	11.6%	17.3%	16.3%	5.2%
Hotel/ resort stores	35.2%	42.2%	23.6%	29.5%	29.9%	35.6%
Swap meet/ flea market	16.6%	15.2%	7.2%	11.7%	8.7%	3.5%
Discount/ outlet stores	14.9%	15.1%	23.8%	15.1%	36.7%	59.5%
Supermarkets	63.6%	53.7%	51.9%	62.8%	44.4%	44.8%
Farmer's market	34.9%	30.6%	17.3%	40.1%	20.0%	12.6%
Convenience stores	51.3%	52.5%	50.2%	54.7%	63.8%	56.9%
Duty free stores	3.7%	3.8%	10.9%	5.5%	4.5%	35.2%
Hawai'i –made products	48.2%	49.6%	16.6%	45.1%	30.1%	25.7%
Local shops and artisans	60.0%	62.6%	11.5%	59.2%	39.7%	20.0%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	70.9%	80.8%	48.0%	70.3%	70.7%	60.0%
Historic military sites and museums	19.3%	31.4%	11.4%	18.9%	40.4%	19.3%
Historic Hawaiian sites and museums	32.9%	37.9%	10.6%	33.4%	22.3%	11.6%
Other historical sites, museums, and homes	13.3%	15.9%	5.7%	12.6%	9.4%	18.1%
Art museums	3.3%	2.7%	2.2%	3.4%	2.2%	3.5%
Art galleries and exhibitions	10.7%	9.2%	2.8%	9.7%	4.9%	1.1%
Lū'au/ Polynesian show/ hula show	29.0%	45.1%	13.6%	29.5%	22.8%	20.6%
Lesson- ex. ukulele, hula, canoe, lei making	5.3%	7.2%	5.8%	5.7%	5.0%	3.3%
Play/ concert/ theatre	3.1%	2.9%	1.5%	2.7%	3.2%	1.8%
Art/ craft fair	11.4%	9.6%	2.2%	10.3%	4.9%	3.5%
Festival /event	6.1%	4.6%	4.3%	5.3%	3.6%	4.1%

ACTIVITIES - TRANSPORTATION

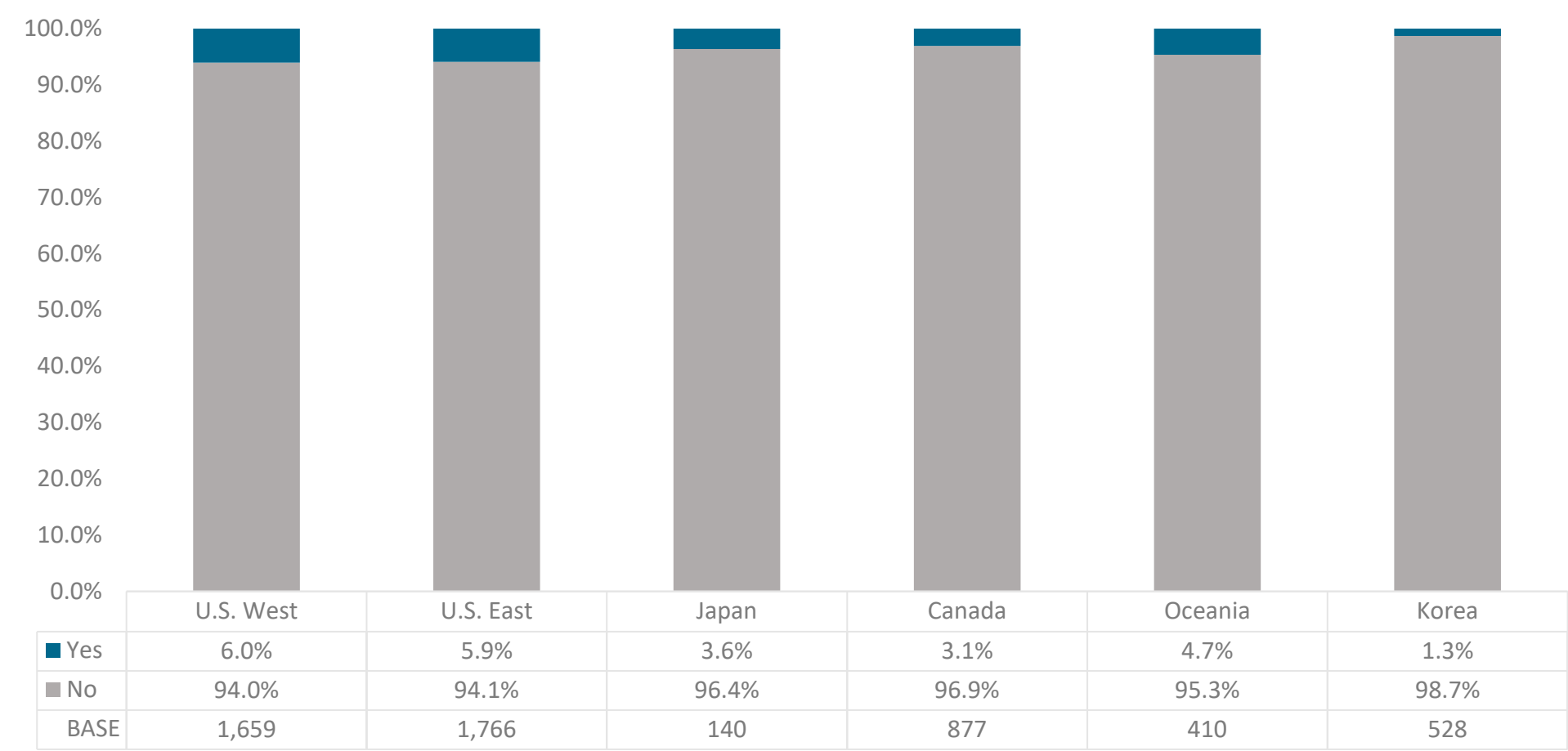
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	95.0%	93.7%	94.2%	94.5%	97.2%	98.6%
Airport shuttle	14.0%	16.6%	15.7%	16.5%	29.9%	13.8%
Trolley	2.9%	3.9%	32.2%	6.2%	11.3%	24.5%
Public bus	4.7%	5.4%	27.1%	12.1%	22.6%	14.4%
Tour bus/ tour van	7.7%	17.4%	11.3%	13.4%	30.4%	23.2%
Taxi/ limo	6.4%	8.7%	31.0%	15.7%	36.1%	23.3%
Rental car	74.9%	69.1%	30.5%	66.3%	26.4%	57.6%
Ride share	18.5%	23.3%	18.7%	20.6%	40.0%	21.2%
Car share (i.e. Hui, Turo)	6.0%	5.7%	0.0%	5.9%	2.6%	3.3%
Bicycle rental	2.0%	2.1%	3.5%	3.0%	1.0%	1.6%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	31.8%	29.8%	20.9%	21.3%	14.0%	19.3%
Visit friends/ family	28.4%	27.5%	20.2%	17.4%	11.3%	17.9%
Giving back to the local community	4.4%	3.1%	1.4%	4.5%	3.0%	1.5%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

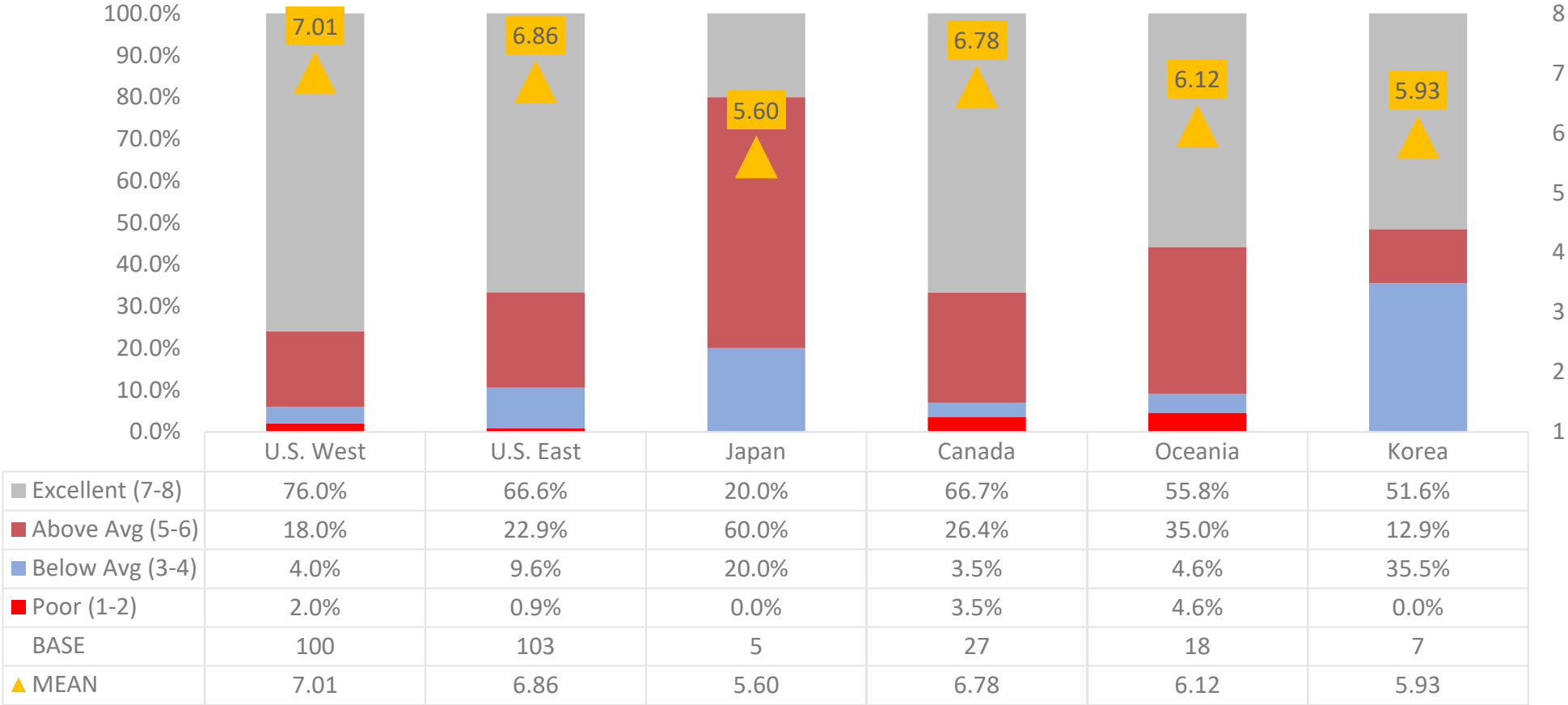


DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Mobility aid	73.0%	72.1%	0.0%	75.2%	82.0%	22.6%
Personal assistance	20.0%	18.8%	0.0%	18.2%	6.8%	0.0%
Other	15.0%	8.5%	20.0%	7.0%	6.8%	0.0%
NA- No one needed assistance	5.1%	2.6%	60.0%	7.4%	4.4%	51.6%
Orientation and Mobility Assistance	4.0%	7.8%	20.0%	7.4%	6.8%	12.9%
ASL Interpreter/ texting/ captioning	1.0%	0.0%	0.0%	7.0%	0.0%	0.0%
Print material in alternate format	1.0%	0.0%	0.0%	3.5%	0.0%	0.0%
Service/ assistance animal	0.0%	0.0%	20.0%	0.0%	0.0%	0.0%
Lift-equipped van	0.0%	1.9%	0.0%	0.0%	0.0%	12.9%
BASE	100	104	5	27	19	7

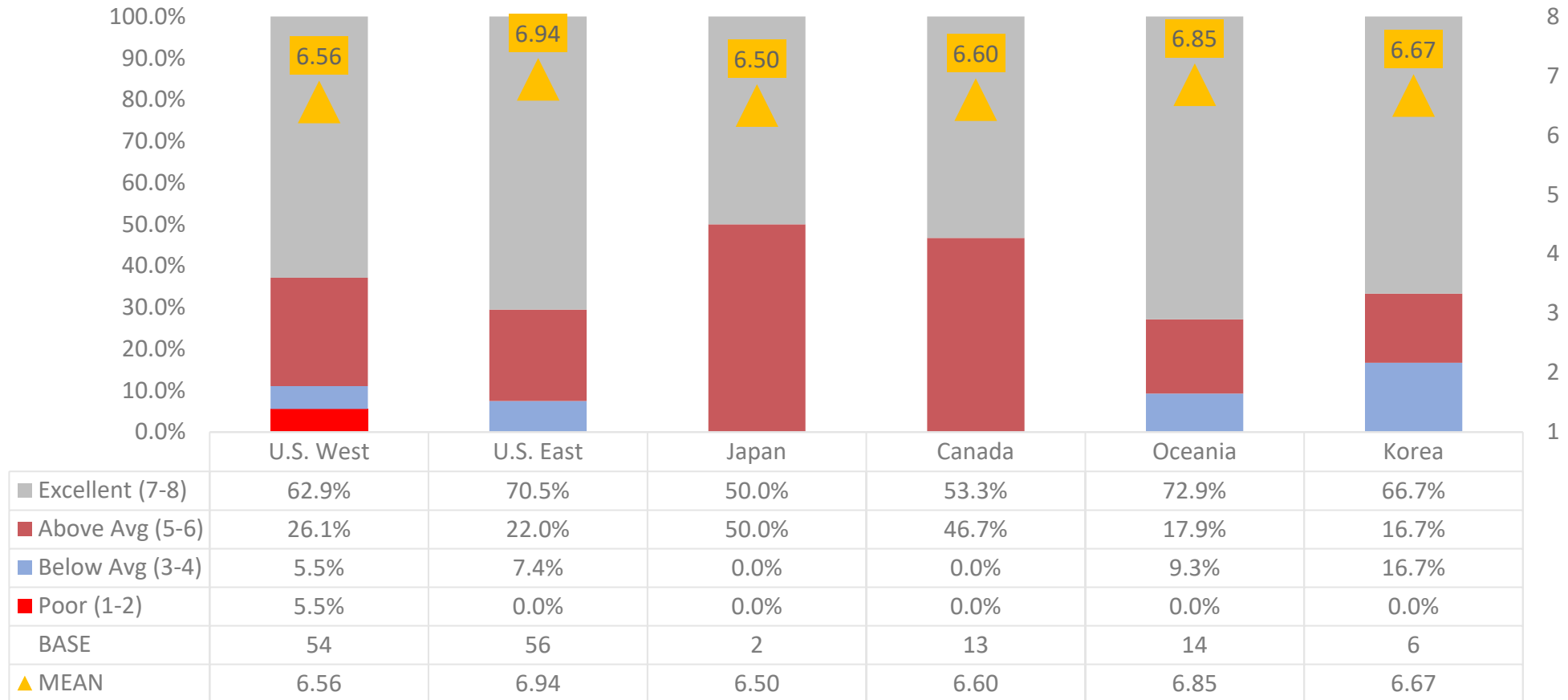
OVERALL ACCESSIBILITY - AIRPORTS

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



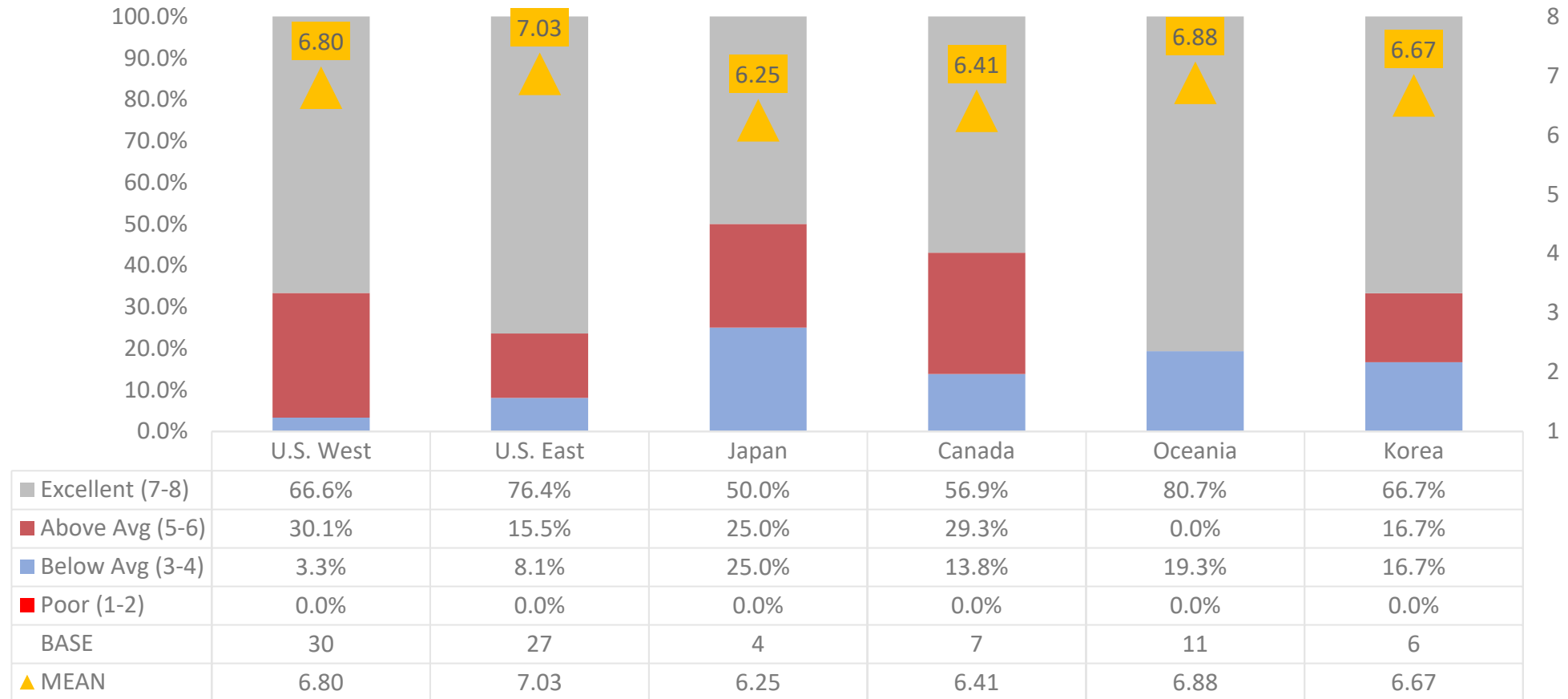
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



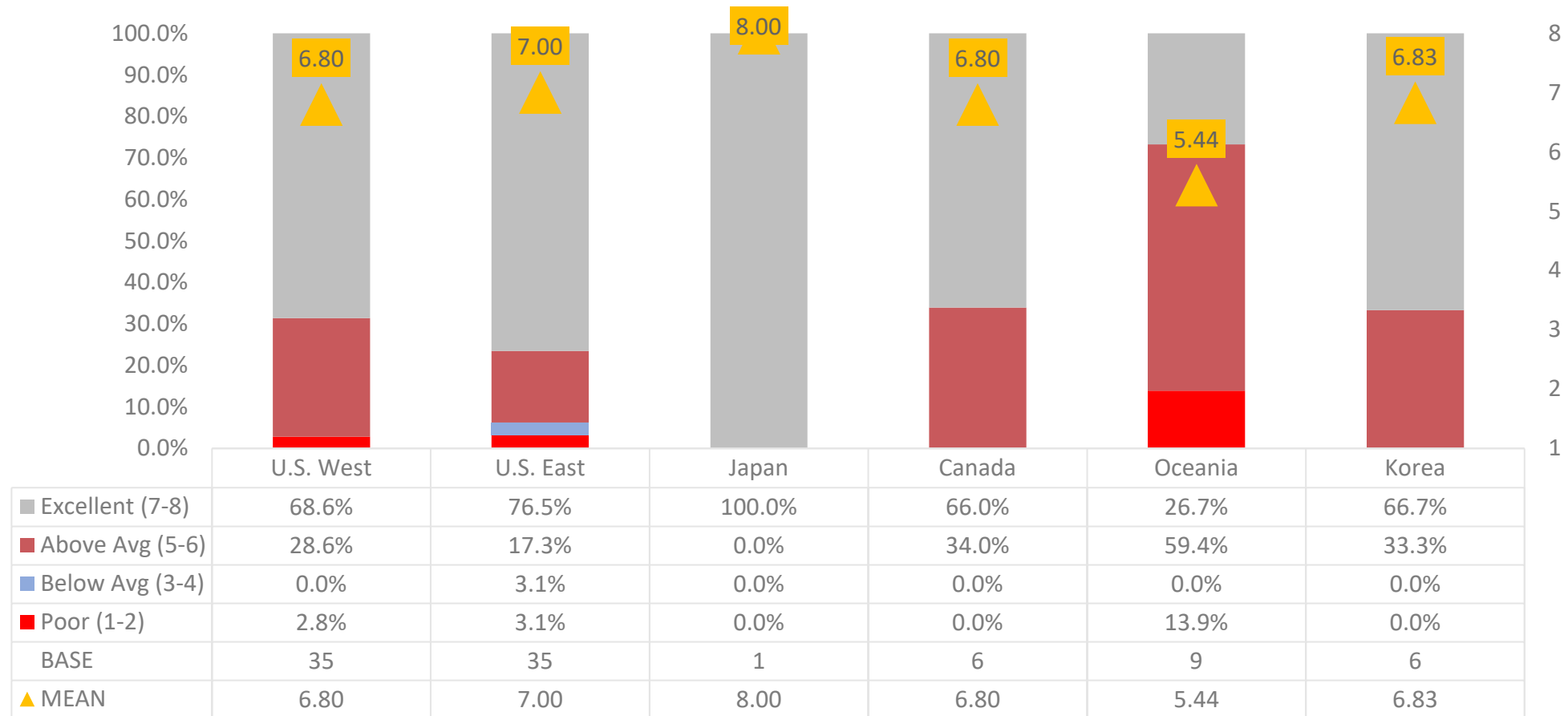
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



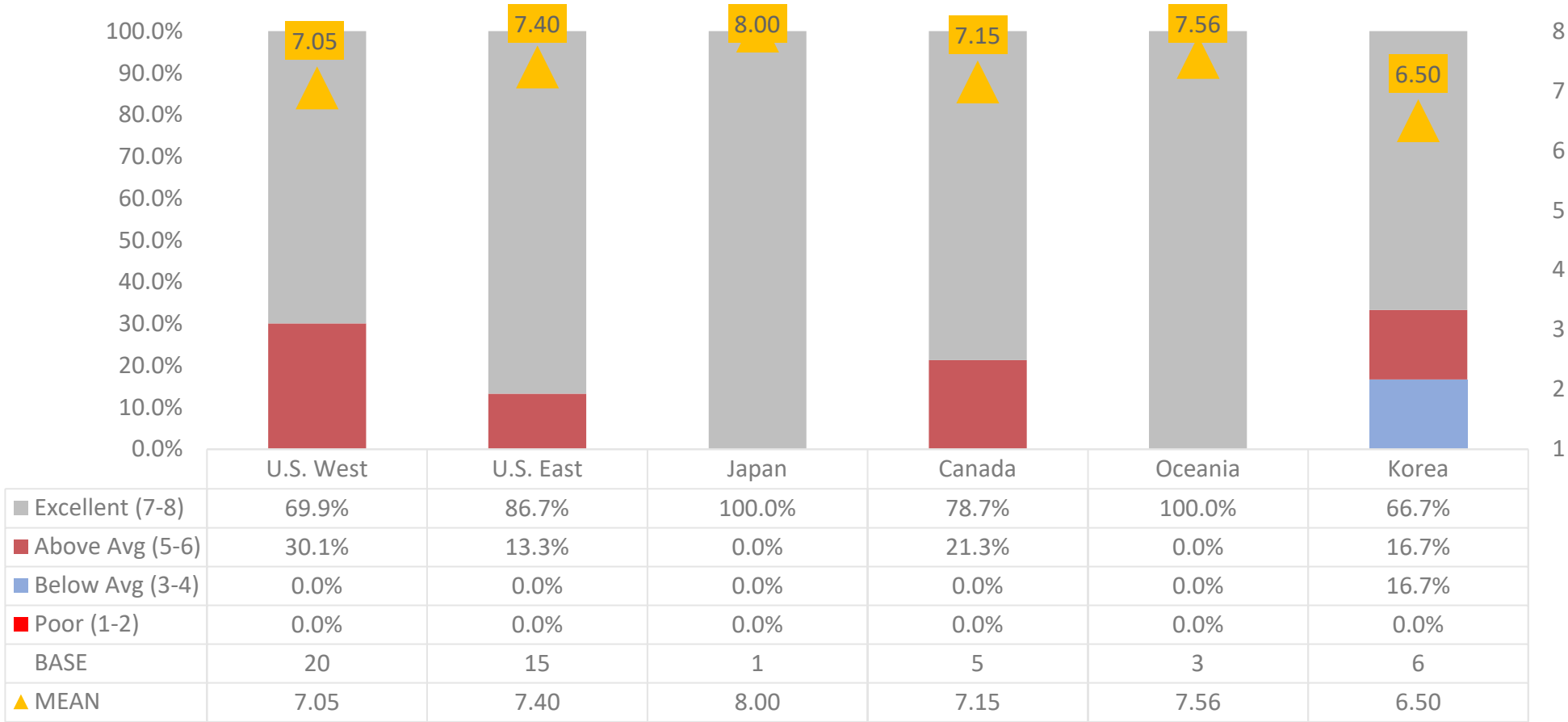
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



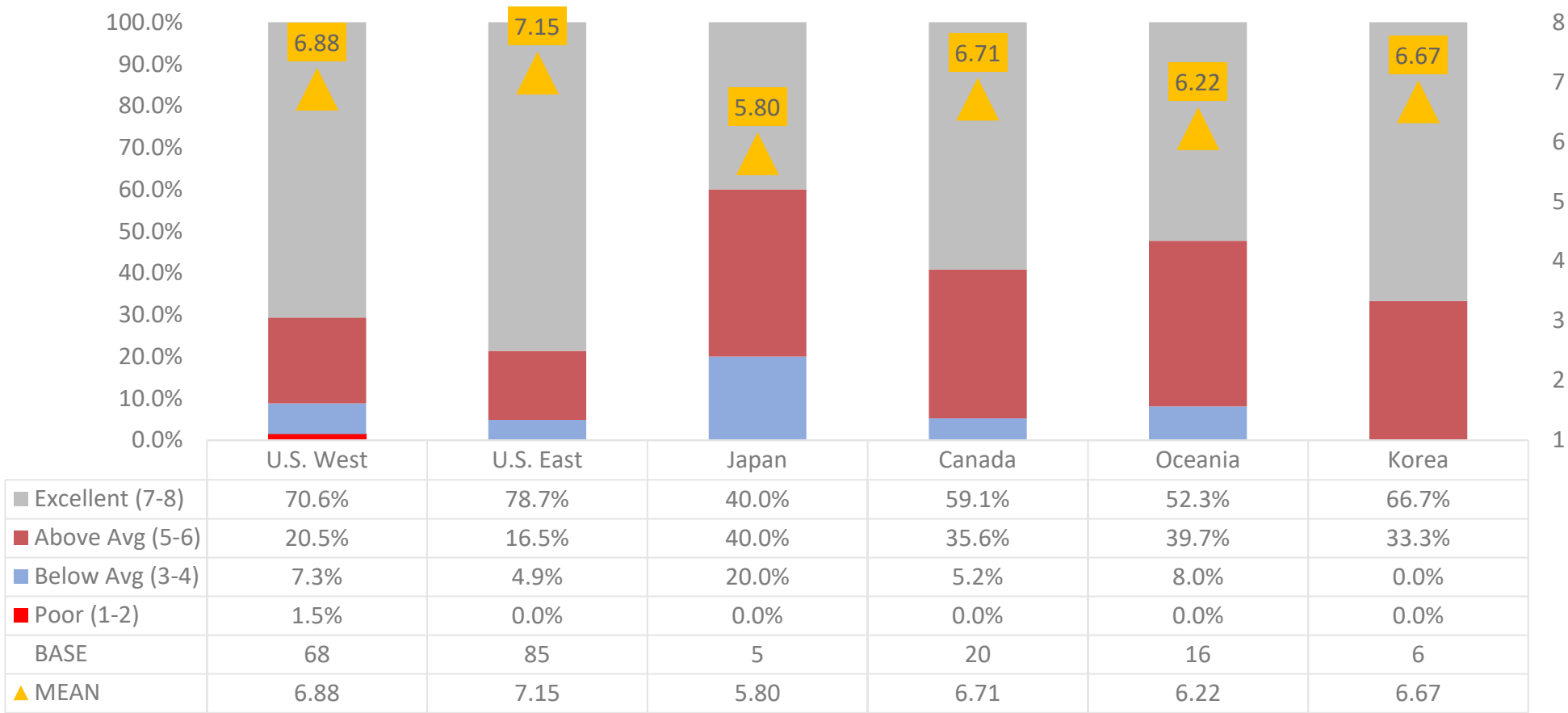
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



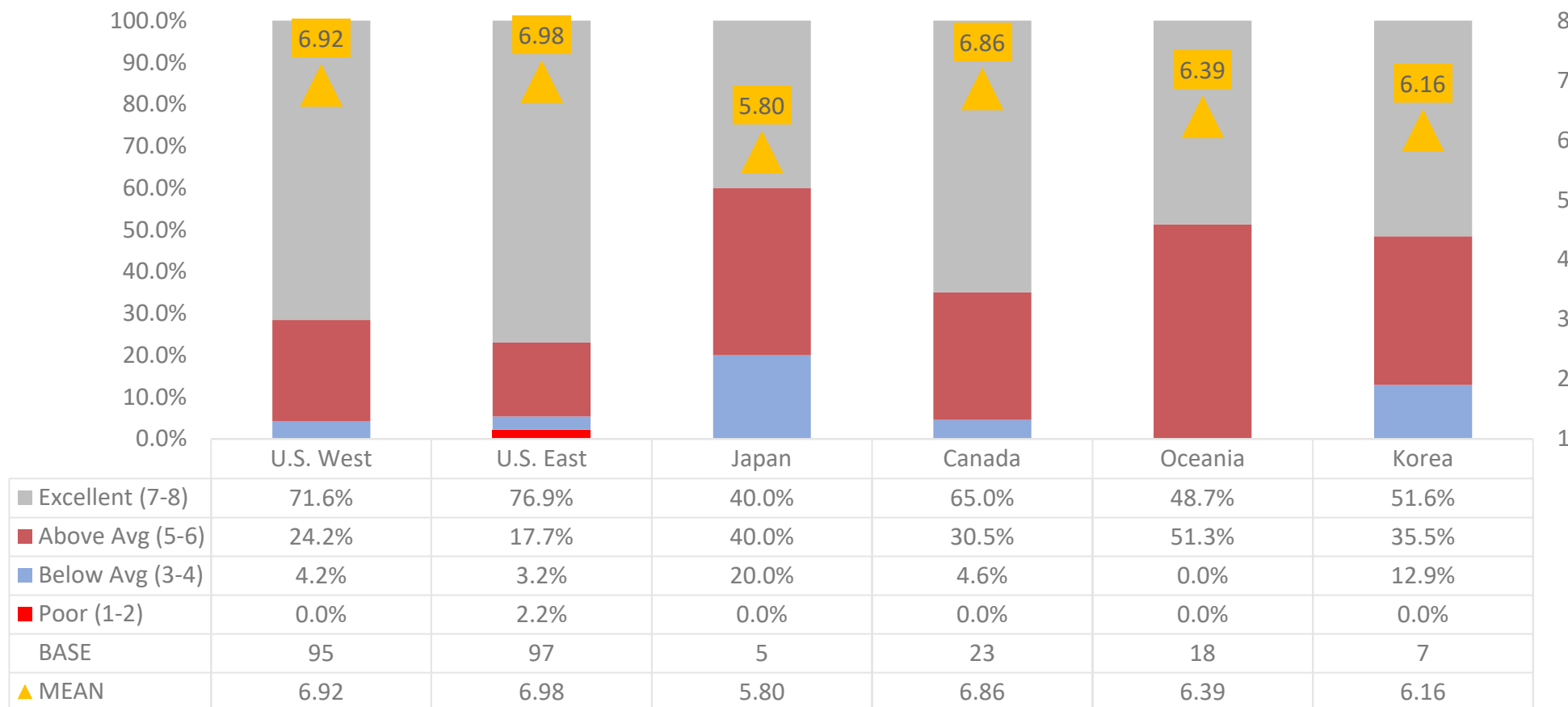
OVERALL ACCESSIBILITY - HOTELS

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



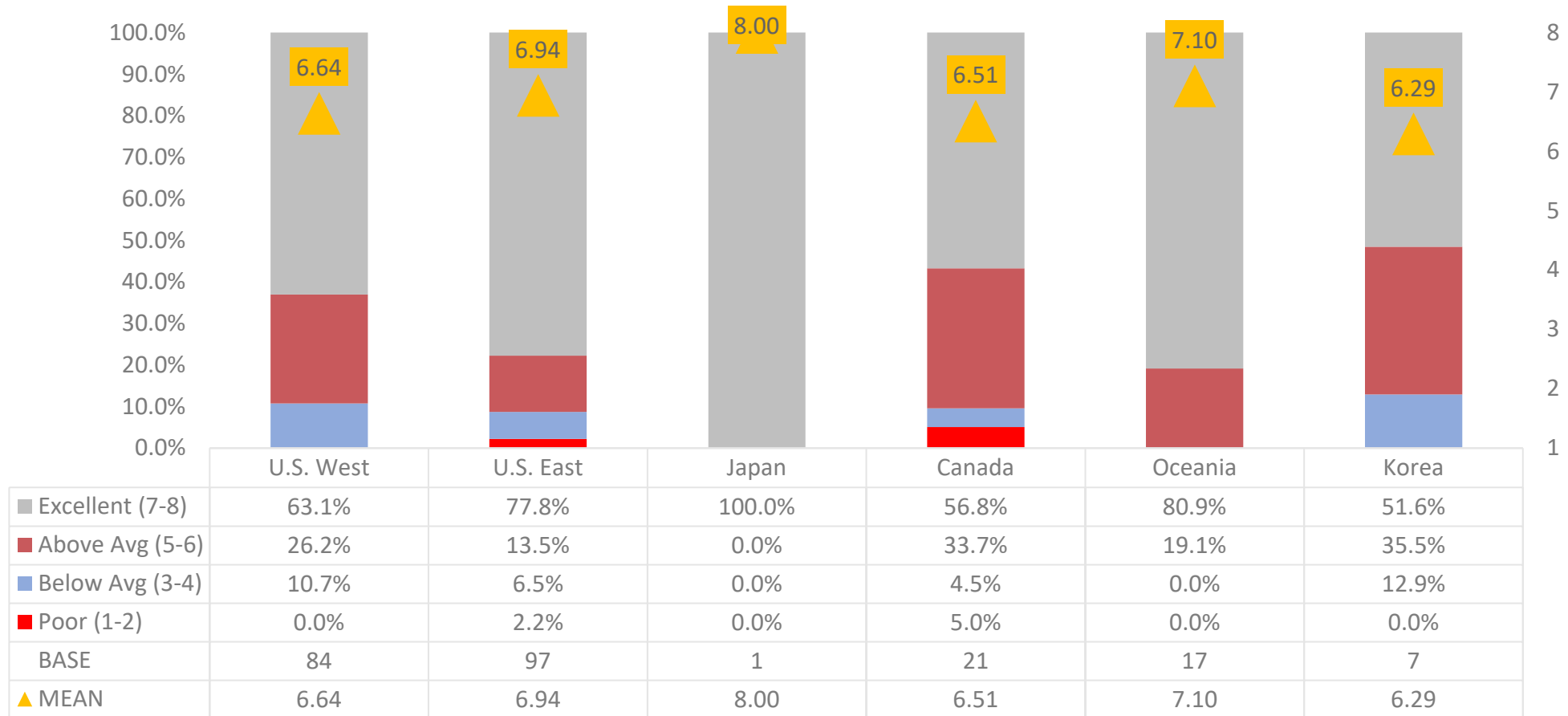
OVERALL ACCESSIBILITY – RESTAURANTS

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



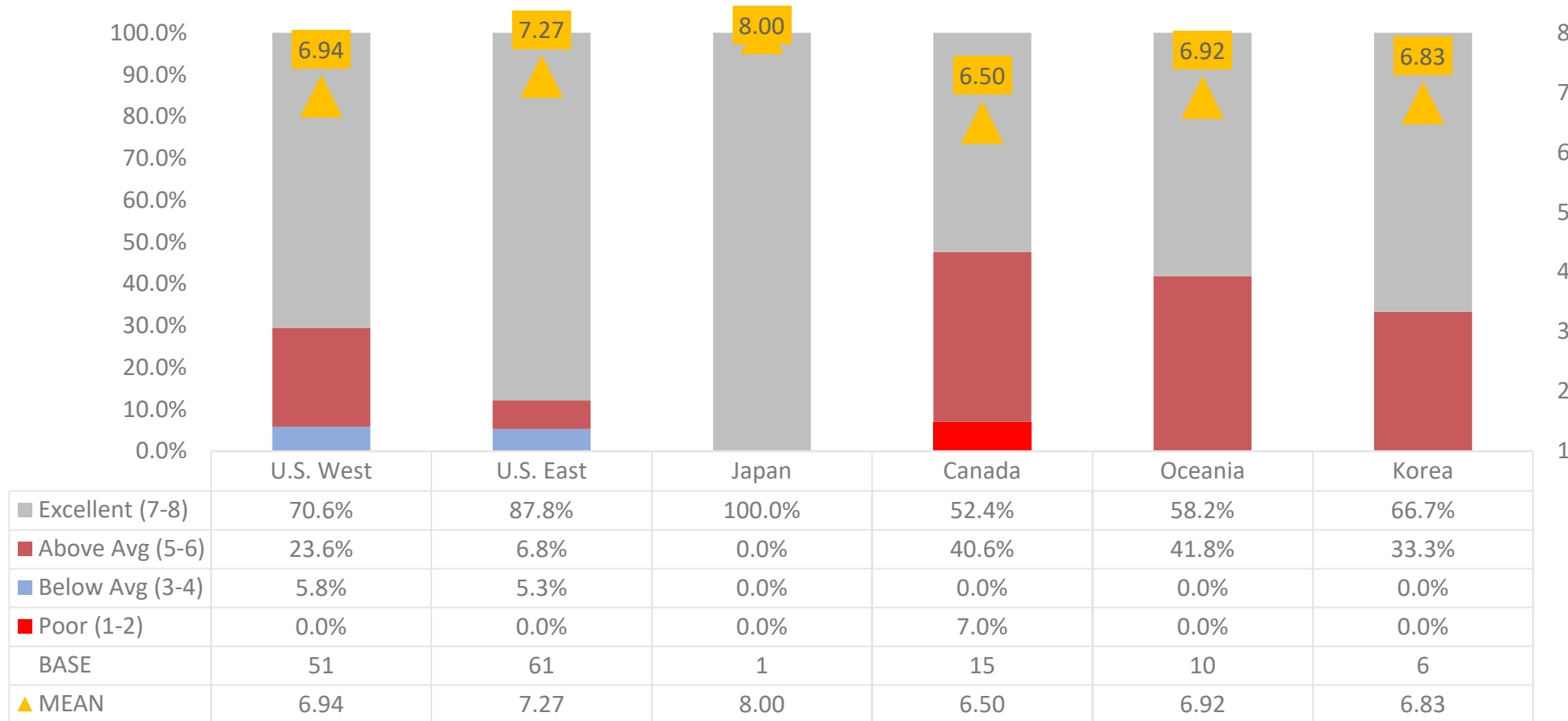
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



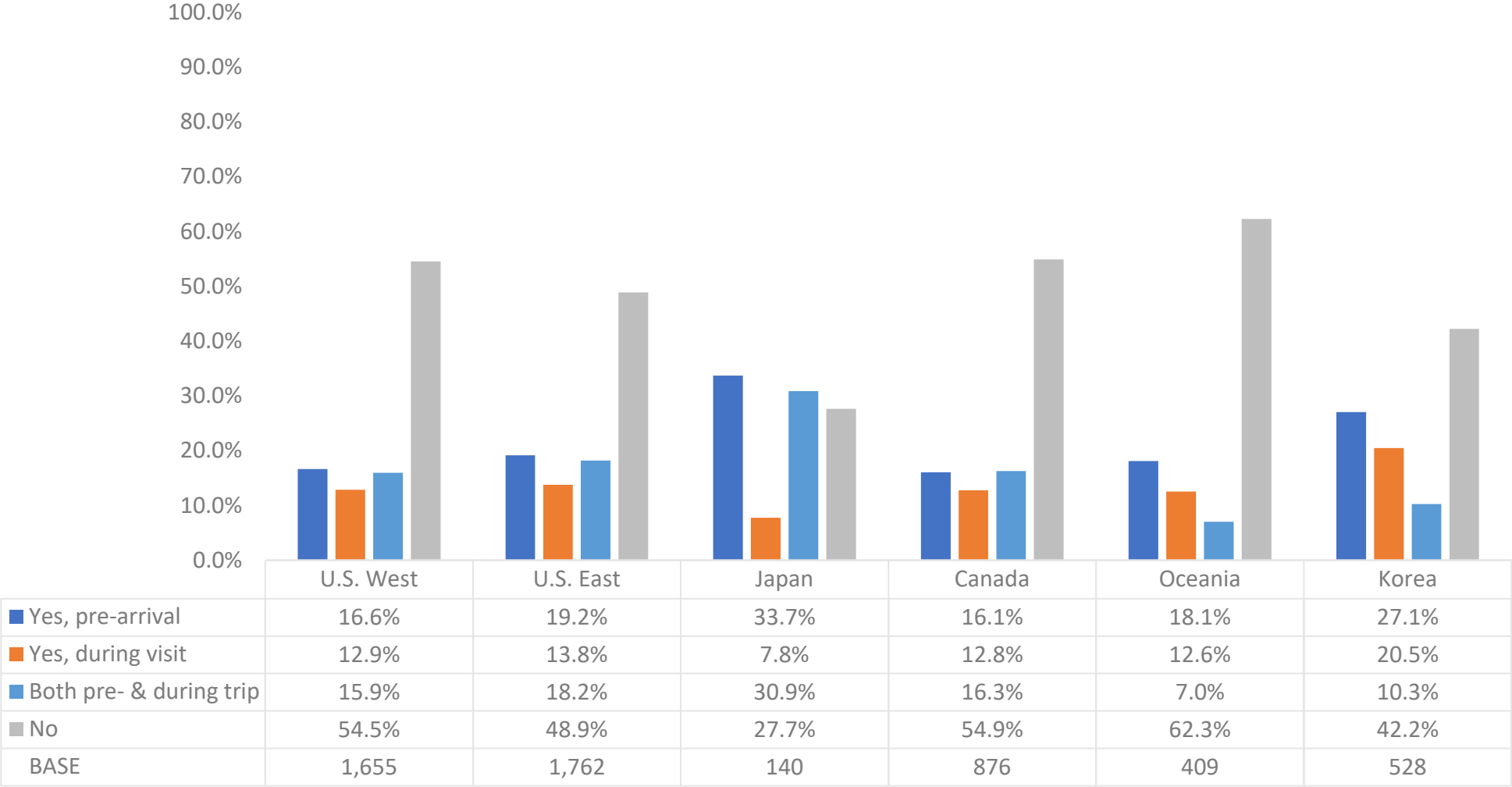
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

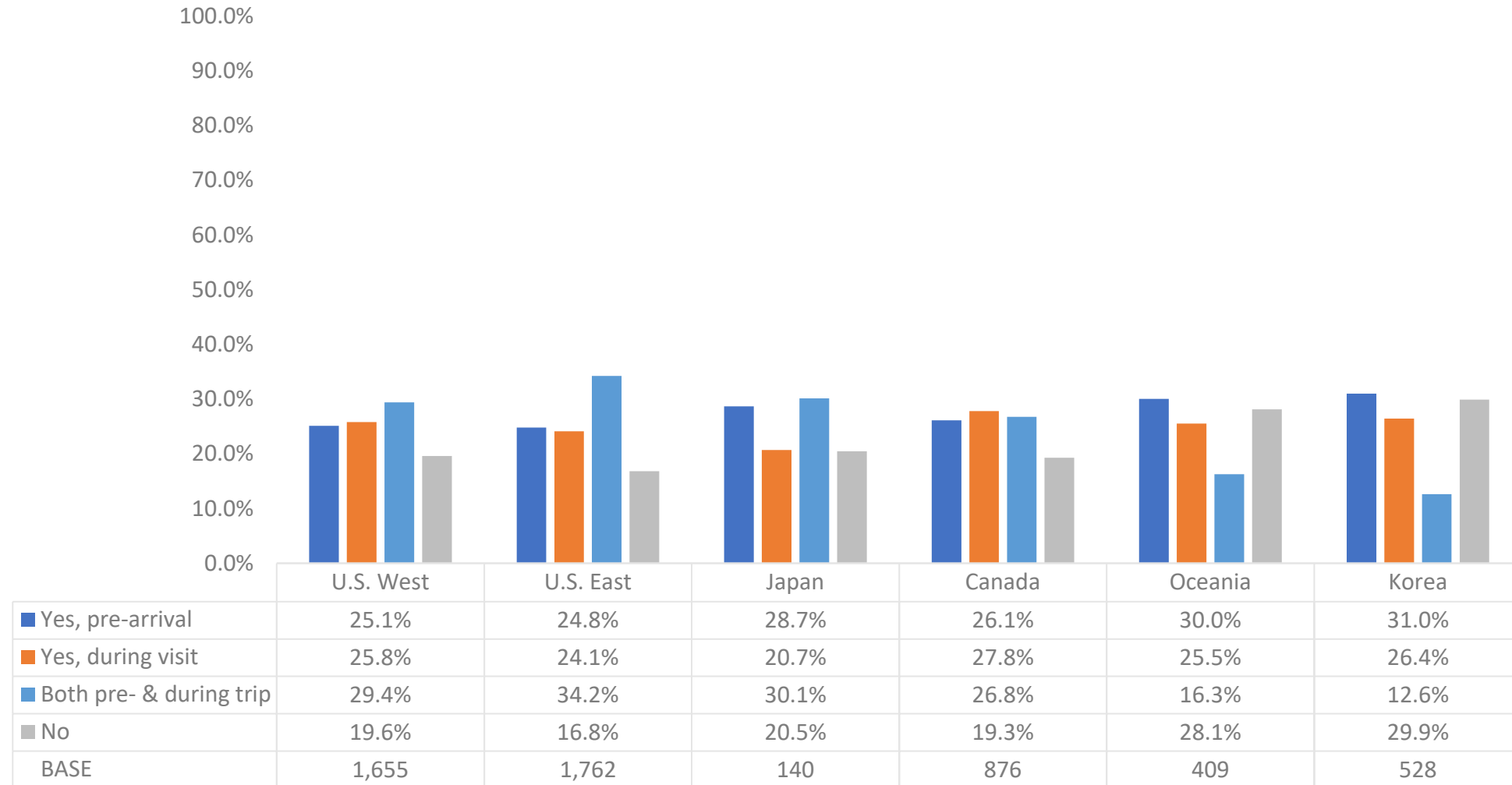


Section 4 – Alternative Messaging

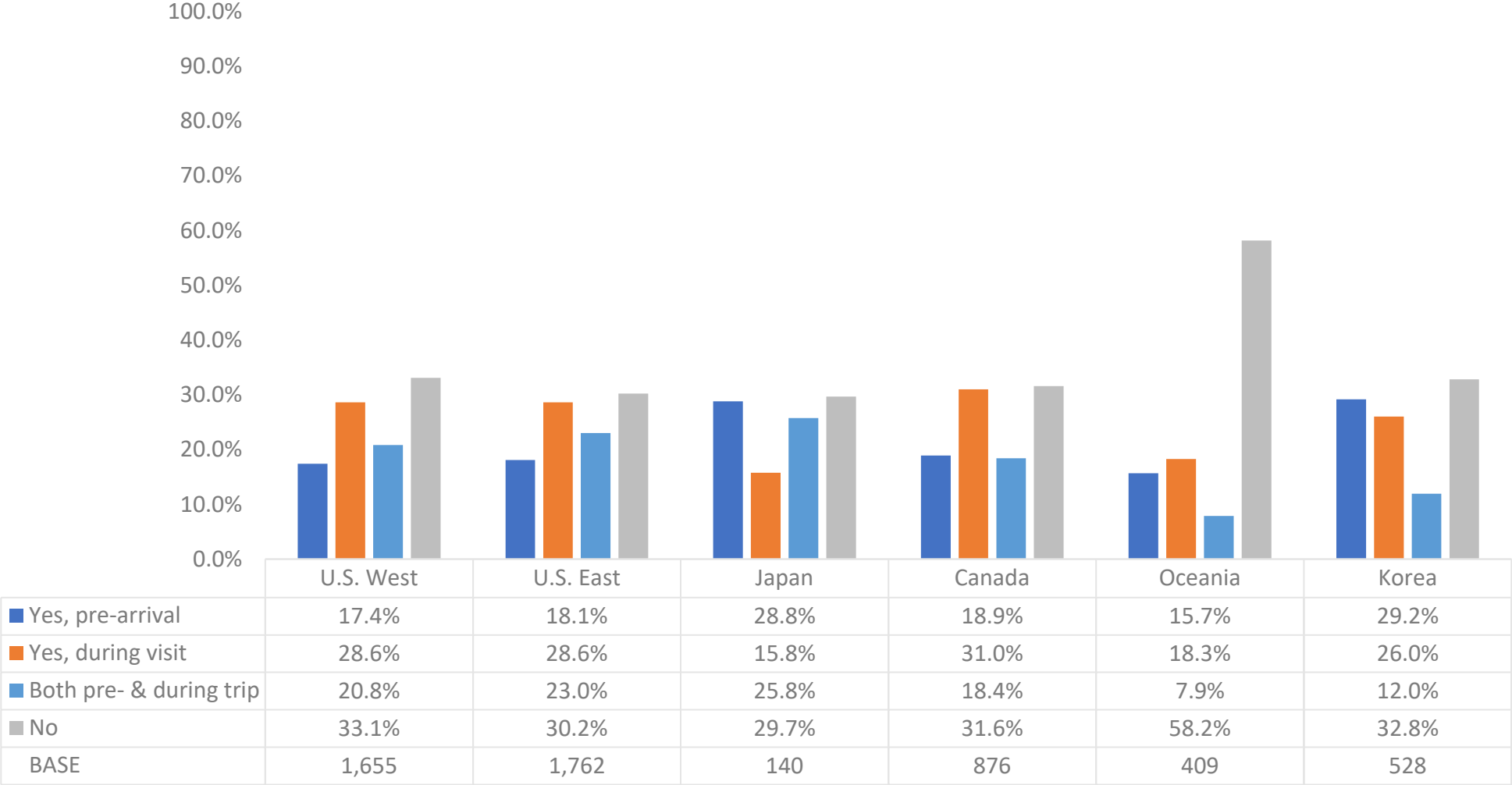
SAFE AND RESPONSIBLE TRAVEL



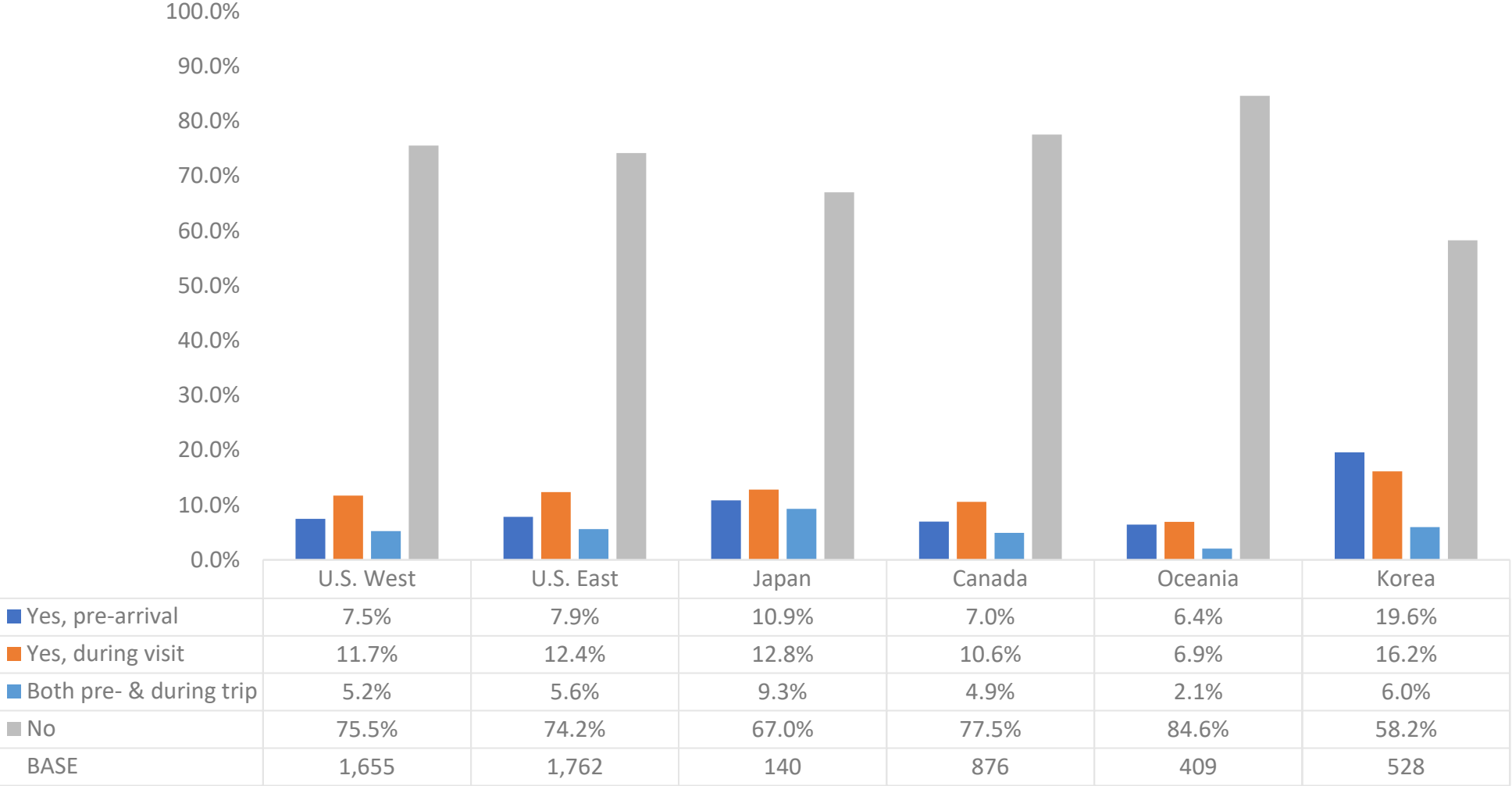
CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE, AND ENVIRONMENT



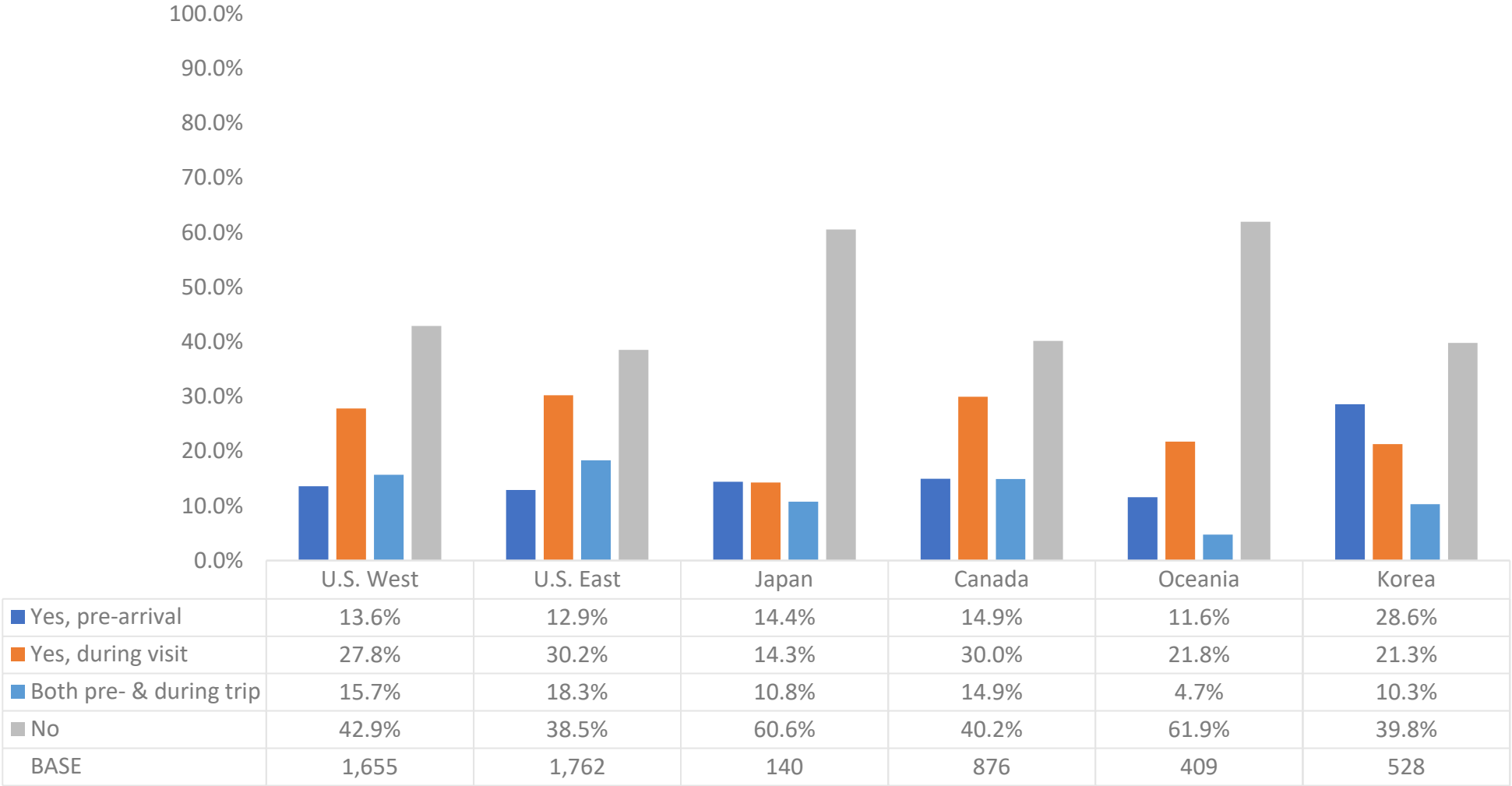
OCEAN AND HIKING SAFETY



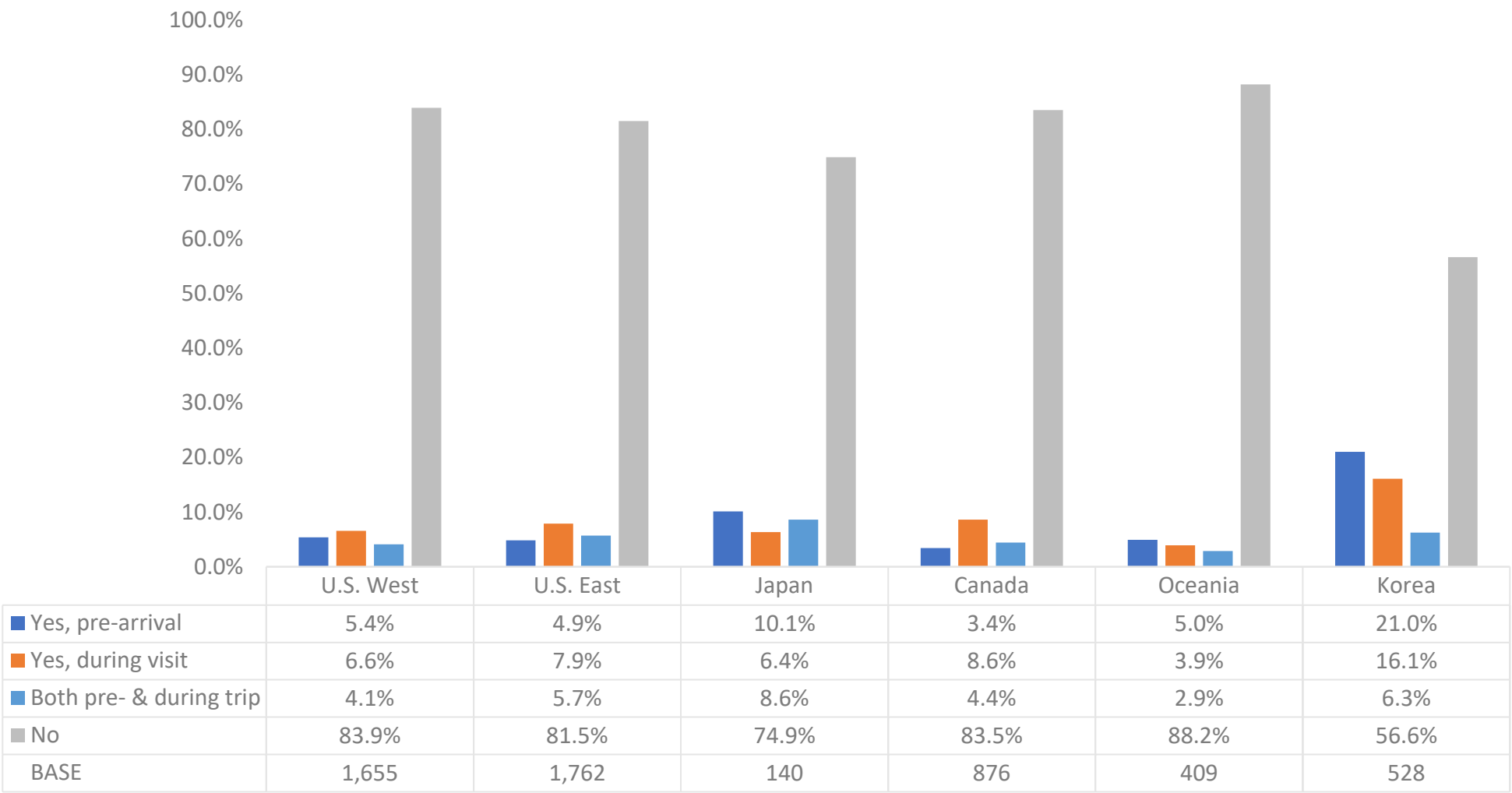
VOLUNTEER/ GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL/ SHOP LOCAL



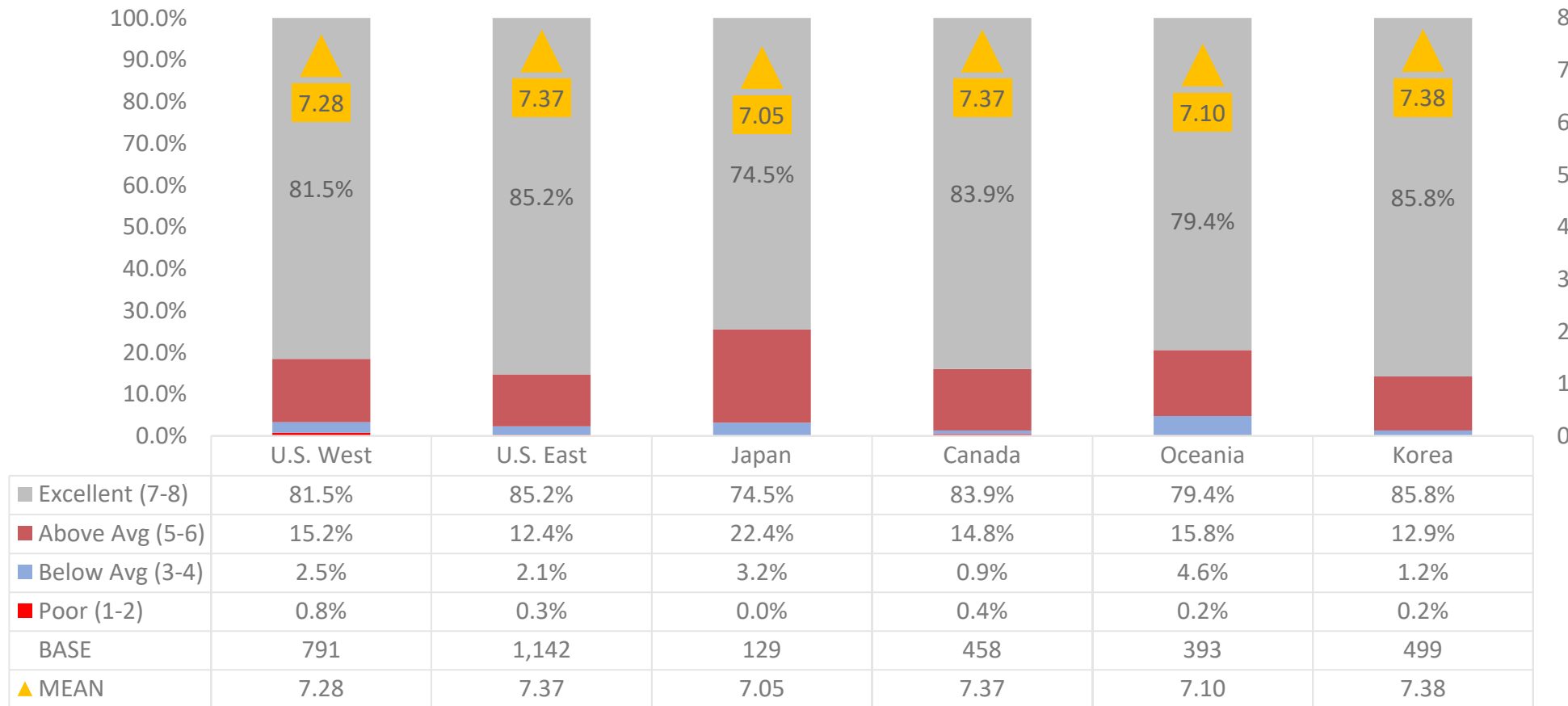
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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



SATISFACTION – O‘AHU

- **Gender:** Females from U.S. West and U.S. East expressed higher levels of satisfaction compared to males.
- **Islands visited:** Visitors from U.S. West and U.S. East whose trip consisted of staying on just O‘ahu gave the island a higher mean satisfaction score than those who also visited one of the Neighbor Islands during their stay.
- **Travel party size:** Those visiting from the U.S. West in larger travel parties of three or more individuals gave higher satisfaction scores compared to smaller travel parties from this market.
- **Age:** Younger travelers under the age of 35 from U.S. West gave statistically higher satisfaction scores than older visitors (65+) from these visitor markets.
- **Education:** Visitors from U.S. East without a college degree gave higher satisfaction scores compared to those visitors with a college degree.

SATISFACTION - O‘AHU

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

100.0%

80.0%

60.0%

40.0%

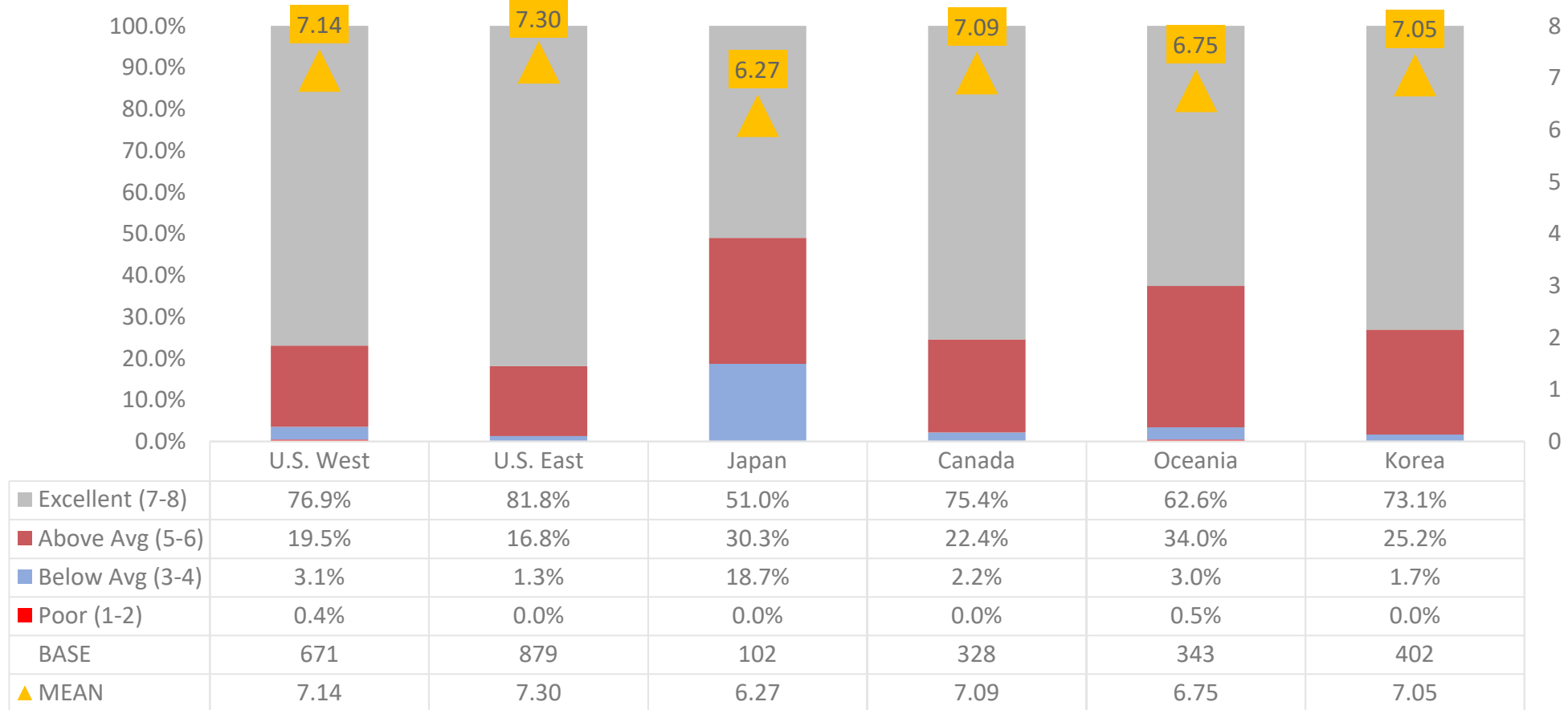
20.0%

0.0%

	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	78.8%	81.4%	79.4%	81.0%	63.3%	77.7%	82.0%	81.5%
U.S. East	77.7%	83.3%	82.3%	81.1%	70.7%	75.8%	83.8%	85.2%
Japan	76.6%	76.7%	72.5%	73.3%			74.5%	74.5%
Canada	79.7%	78.5%	82.4%	83.5%			82.7%	83.9%
Oceania	77.5%	79.8%	79.4%	75.1%			75.6%	79.4%
Korea	82.1%	70.7%	65.7%	70.7%			83.9%	85.8%

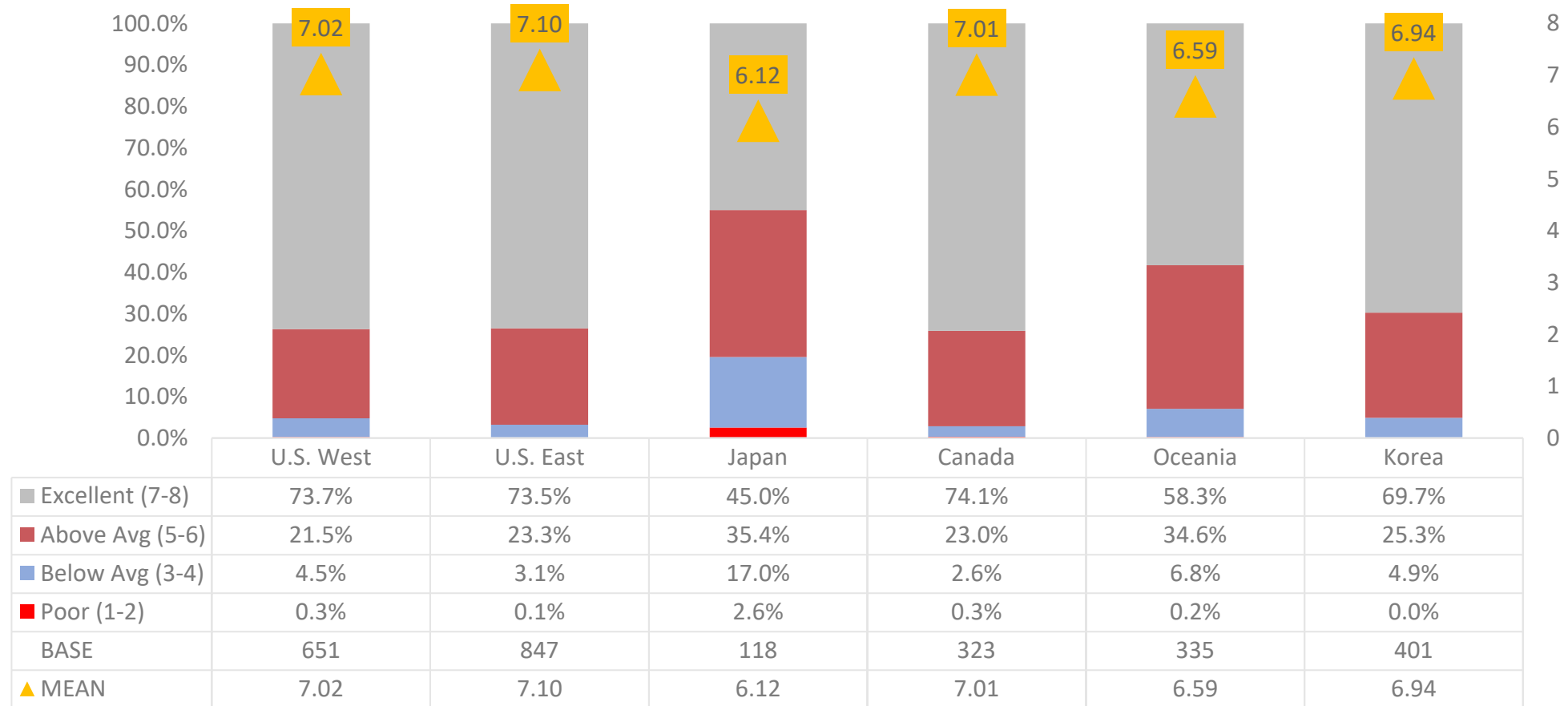
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



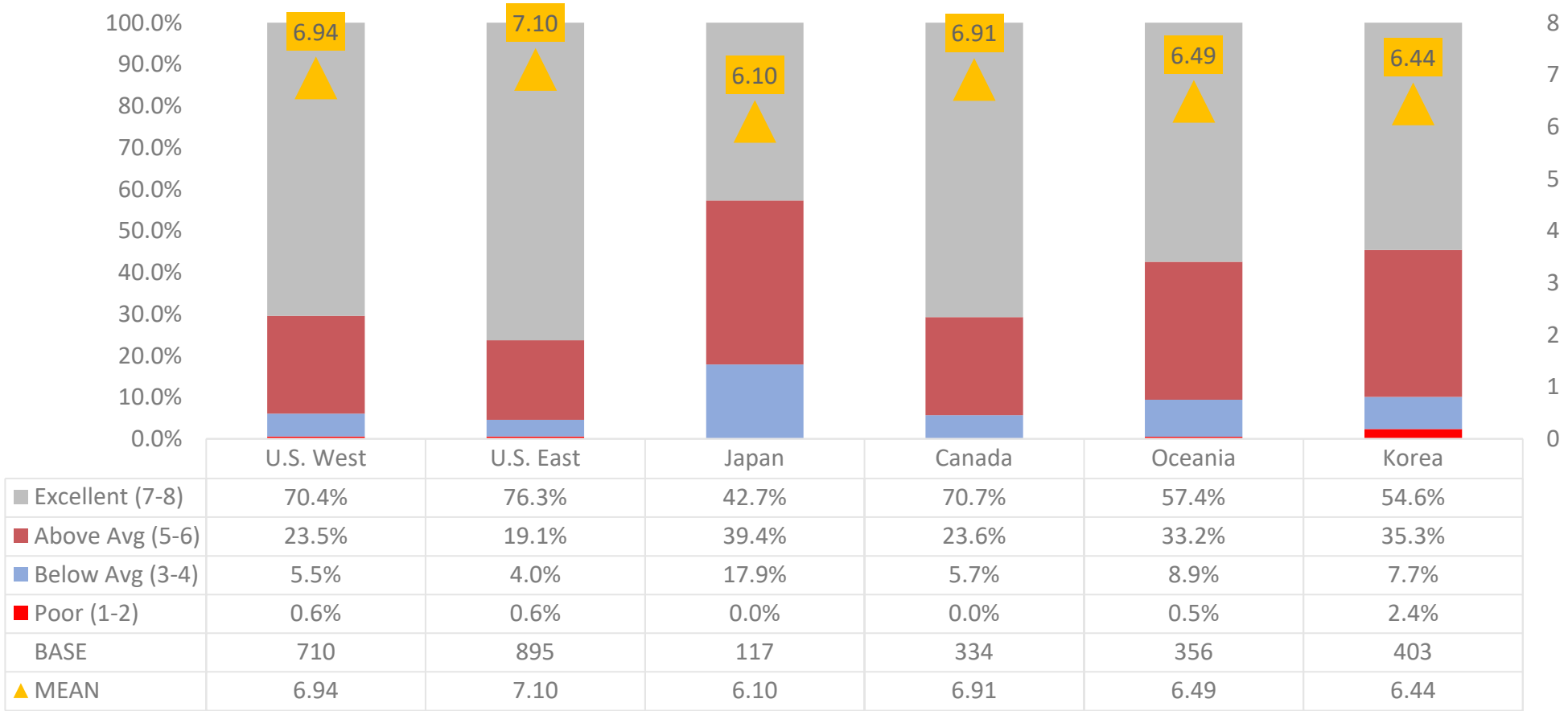
SHOPPING - O‘AHU

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



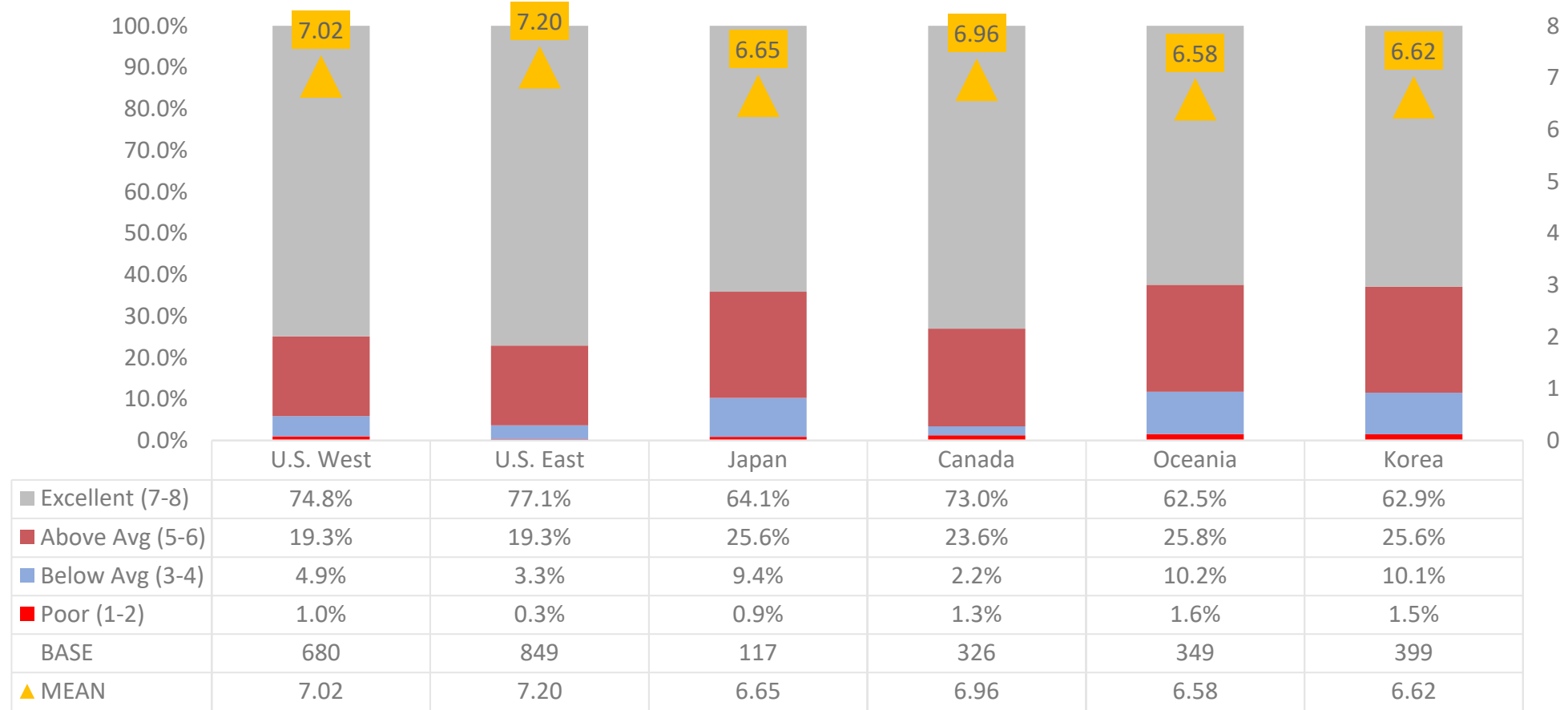
DINING/ FOOD & BEVERAGES - O'AHU

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



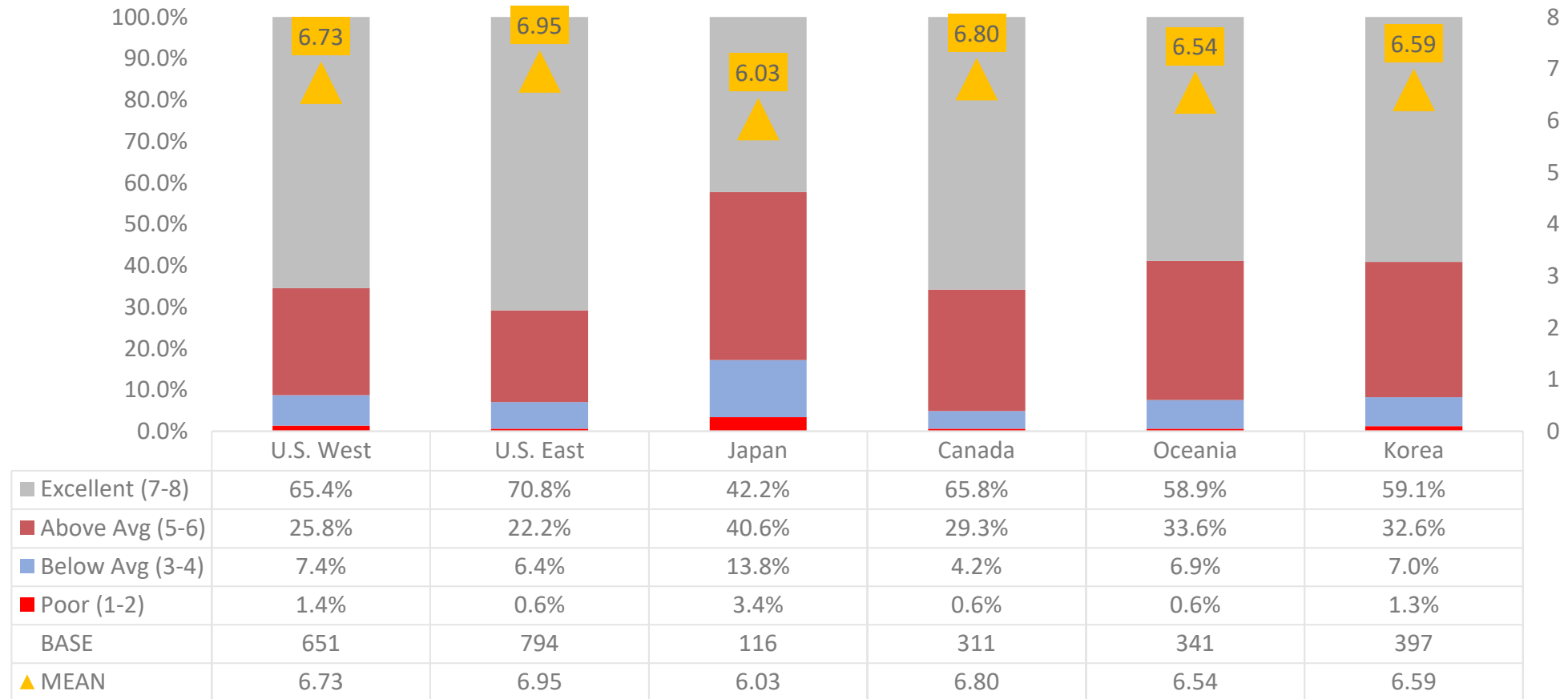
LODGING/ ACOMMODATIONS - O‘AHU

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



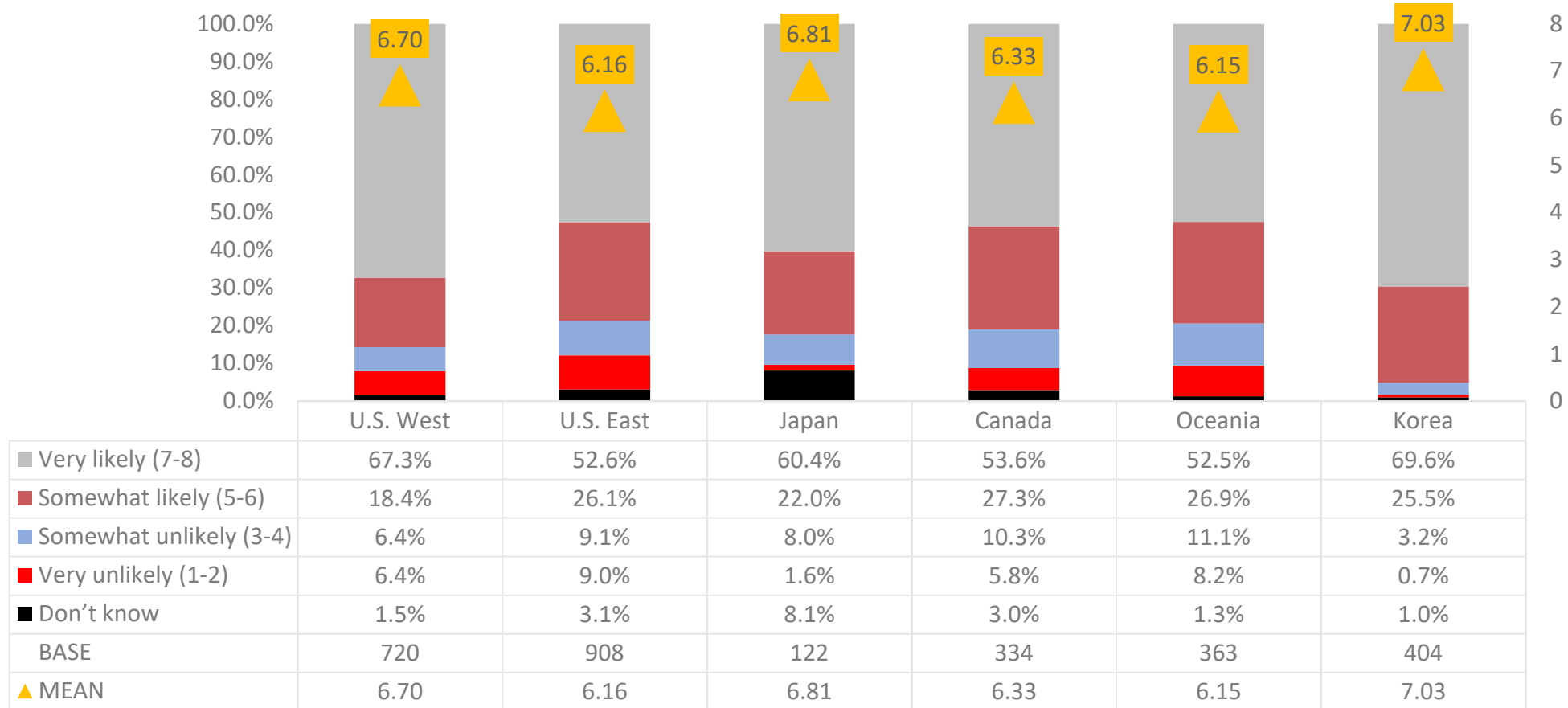
TRANSPORTATION ON ISLAND - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

100.0%

80.0%

60.0%

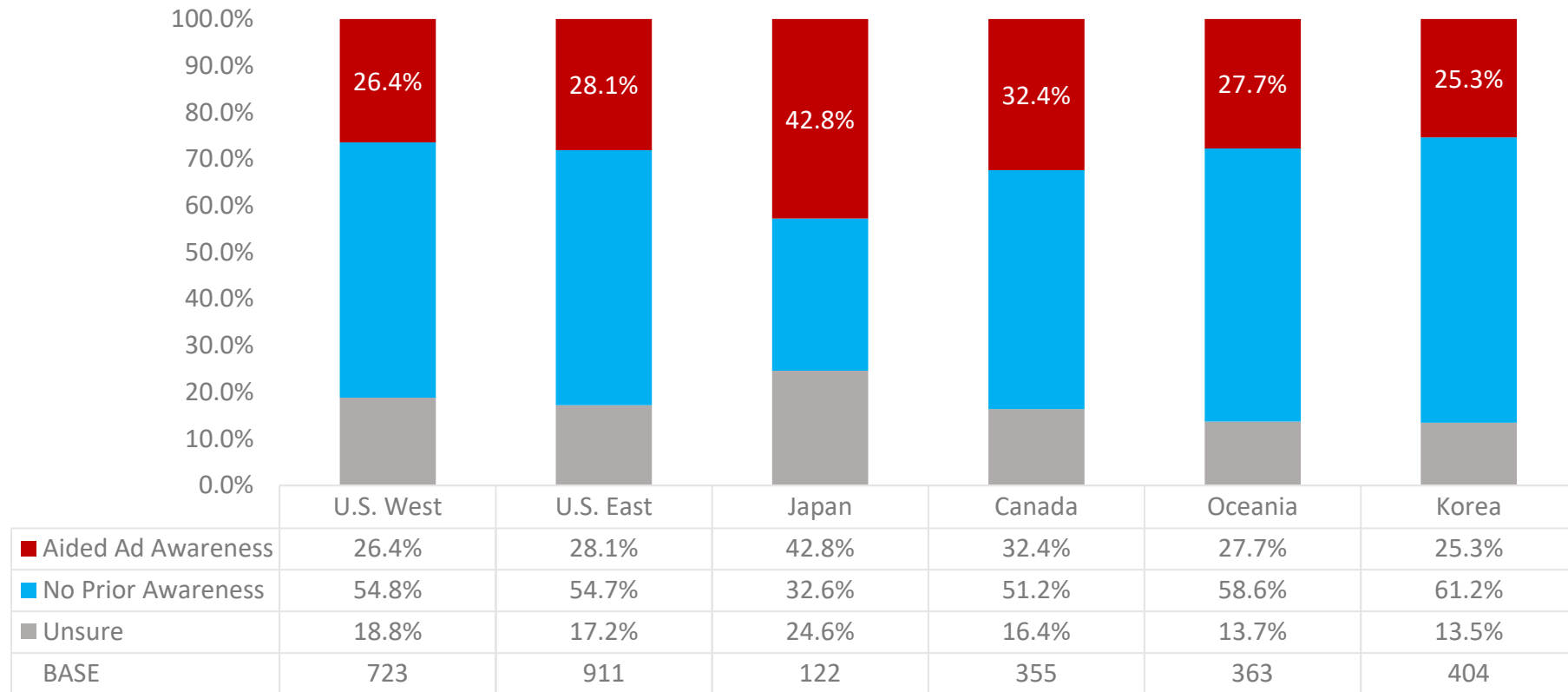
40.0%

20.0%

0.0%

	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	58.6%	67.8%	79.9%	67.4%	67.8%	67.3%
U.S. East	51.1%	52.0%	72.6%	54.7%	54.1%	52.6%
Japan	55.6%	57.5%			80.8%	60.4%
Canada	51.9%	54.4%			55.6%	53.6%
Oceania	56.1%	48.9%			63.2%	52.5%
Korea	54.4%	64.4%			86.0%	69.6%

AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	38.2%	44.9%	32.0%	48.8%	35.9%	54.5%
Hawaiian cultural events	19.3%	16.2%	12.4%	18.2%	9.6%	3.9%
Outdoor or sporting activities and events	15.8%	9.9%	9.9%	15.8%	6.6%	13.9%
Social media posts and videos	12.5%	10.9%	27.0%	22.2%	9.8%	19.5%
Hawaiian music	9.7%	5.0%	16.5%	8.8%	3.5%	2.1%
Television programs or movies filmed in Hawai‘i	8.6%	12.0%	36.1%	16.7%	17.5%	14.4%
BASE	721	910	122	335	363	404

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Atlantis Submarine & Cruises	1.8%	3.6%	1.6%	2.9%	1.5%	4.3%
Bernice P. Bishop Museum	4.0%	3.8%	0.8%	2.7%	2.4%	1.8%
Byodo-In Temple	12.9%	12.0%	0.0%	16.0%	7.5%	0.6%
Chinatown & Honolulu Art District	11.2%	11.2%	7.5%	9.6%	5.8%	4.1%
Diamond Head State Monument	23.1%	34.6%	24.6%	39.0%	25.2%	42.7%
Dole Plantation	31.2%	38.3%	10.8%	36.0%	20.6%	40.4%
Foster Botanical Garden	2.7%	3.1%	0.0%	3.1%	1.1%	2.1%
Hale‘iwa	22.3%	21.3%	18.2%	21.4%	10.6%	6.5%
Hanauma Bay Nature Reserve	10.2%	11.3%	4.9%	12.2%	4.3%	23.3%
Harold L. Lyon Arboretum	0.7%	0.7%	0.0%	1.2%	0.2%	1.7%
Hawai‘i State Art Museum	1.5%	0.6%	1.6%	2.7%	1.1%	0.4%
Honolulu Museum of Art	3.1%	1.8%	2.5%	2.7%	1.3%	1.5%
Hawaiian Mission Houses, Historic Site and Archive	1.3%	1.2%	0.0%	1.1%	0.4%	0.4%
Hawai‘i’s Plantation Village	2.5%	1.9%	0.0%	2.1%	0.6%	1.9%
Honolulu Zoo	6.7%	7.2%	4.9%	12.7%	7.8%	7.9%

ATTRACTIONS - O'AHU

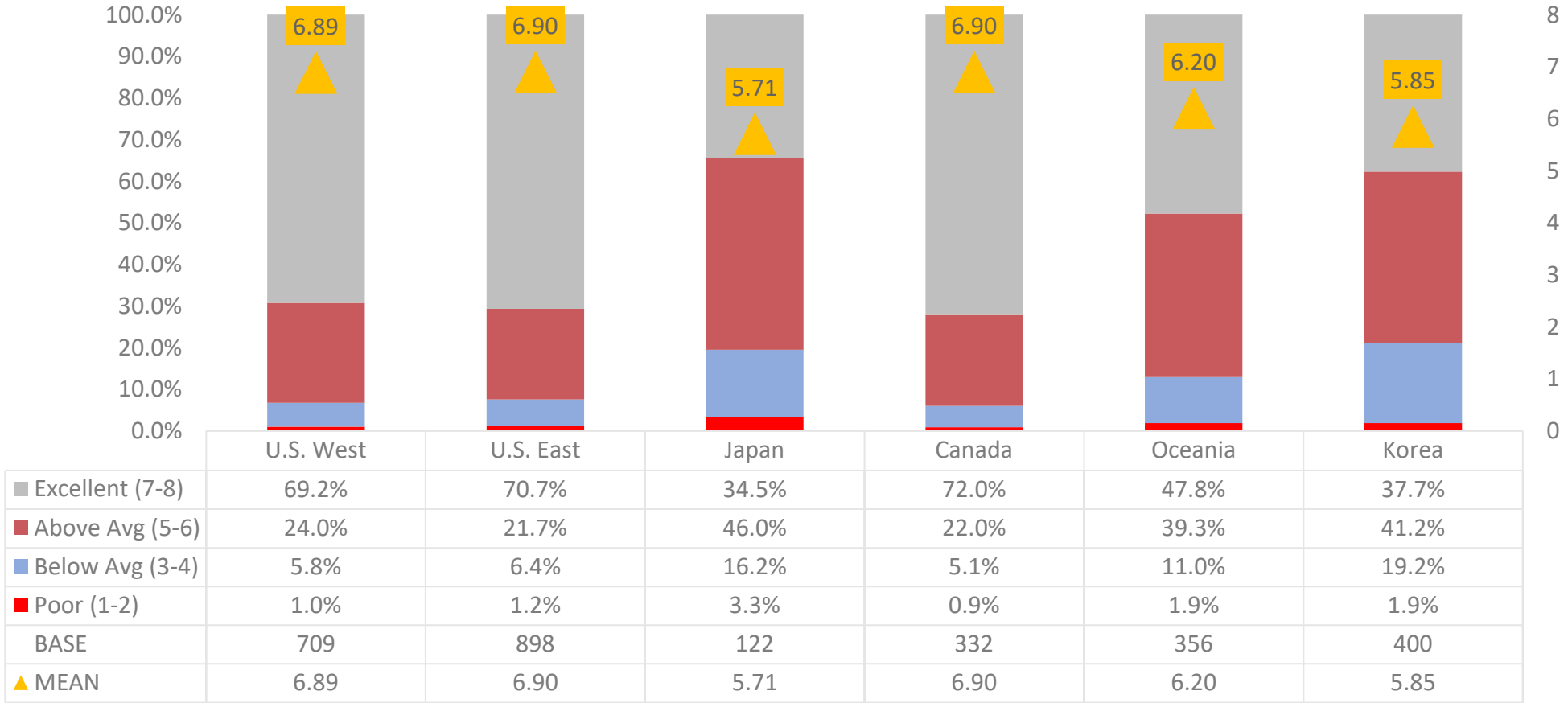
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Ho'omaluhia Botanical Garden	6.3%	5.8%	0.0%	8.9%	1.9%	2.2%
'Iolani Palace State Monument	5.3%	8.2%	6.6%	5.9%	4.1%	15.4%
Kailua Town	13.0%	12.5%	13.3%	16.3%	6.8%	4.5%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	4.9%	8.0%	0.8%	6.3%	1.9%	0.8%
Kaka'ako Street Art	2.5%	1.8%	10.7%	1.9%	1.4%	3.6%
Koko Head Crater Trail	6.6%	6.8%	3.4%	11.2%	2.0%	5.1%
Kualoa Private Nature Reserve	13.9%	18.2%	6.4%	19.4%	11.0%	16.9%
Lanikai or Kailua Beach	26.6%	24.7%	21.6%	31.0%	9.8%	19.1%
Mānoa Falls & Trail	11.2%	10.9%	5.8%	14.7%	4.3%	2.1%
National Memorial Cemetery of the Pacific	7.3%	13.1%	1.7%	6.8%	7.1%	1.5%
Nu'uanu Pali Lookout	10.8%	15.0%	2.5%	10.9%	4.6%	5.1%
North Shore Beaches	43.4%	48.1%	14.0%	44.0%	28.5%	21.7%

ATTRACTIONS - O'AHU

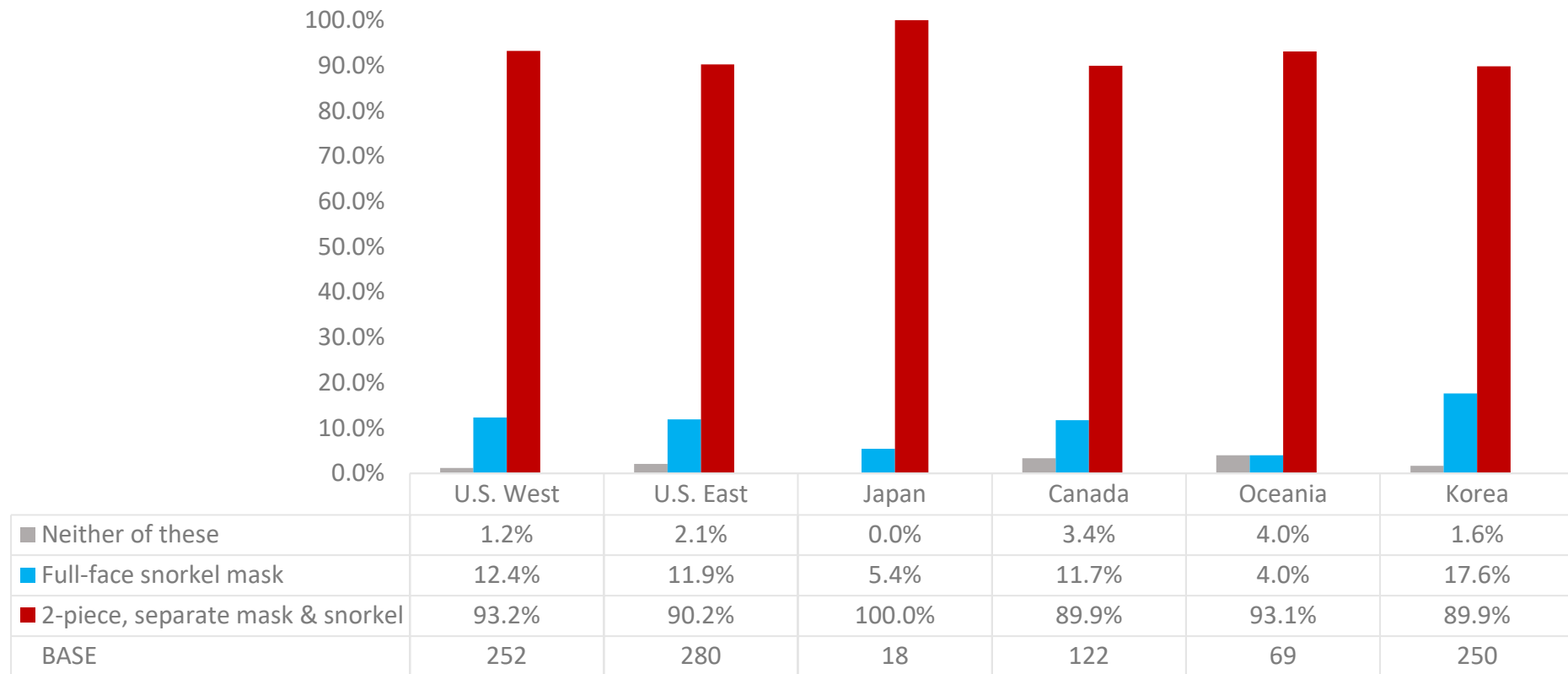
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Pearl Harbor National Memorial	33.5%	49.3%	4.1%	32.7%	39.5%	8.8%
Battleship Missouri Memorial	13.8%	22.0%	6.6%	12.5%	22.7%	3.3%
Pearl Harbor Aviation Museum	11.4%	18.5%	5.8%	12.5%	13.7%	1.3%
Pacific Fleet Submarine Museum	5.6%	8.5%	0.0%	3.5%	5.7%	0.2%
Polynesian Cultural Center	17.1%	15.4%	0.8%	14.7%	6.9%	7.6%
Queen Emma's Summer Palace	1.7%	3.0%	0.0%	1.2%	1.6%	0.0%
Sea Life Park Hawai'i	4.1%	3.8%	1.7%	3.0%	1.8%	2.6%
Waikiki Aquarium	5.0%	5.1%	3.3%	5.0%	4.2%	3.8%
Waimanalo Beach Park	9.1%	8.5%	1.7%	16.2%	4.6%	4.7%
Waimea Valley	16.8%	20.4%	0.0%	19.0%	8.4%	2.0%

DANIEL K. INOUE INTERNATIONAL AIRPORT

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



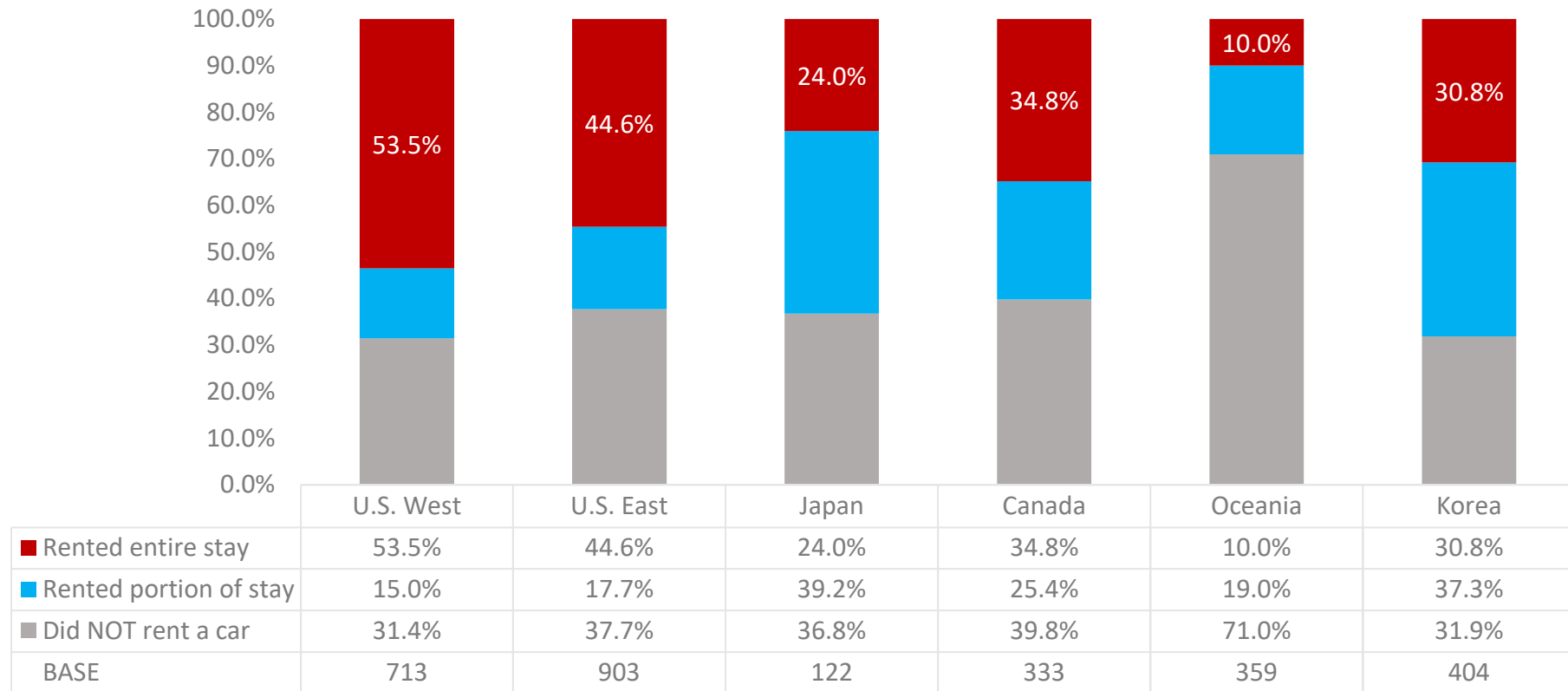
SNORKELING EQUIPMENT USED - O‘AHU



SNORKELING OCEAN SAFETY - O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	96.4%	98.2%	94.3%	98.4%	100.0%	97.0%
Yes, needed assistance – using 2-piece mask & snorkel	3.2%	1.8%	5.7%	1.6%	0.0%	2.6%
Yes, while snorkeling using a full-face snorkel mask	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%
BASE	249	274	18	118	66	247

CAR RENTAL - O'AHU



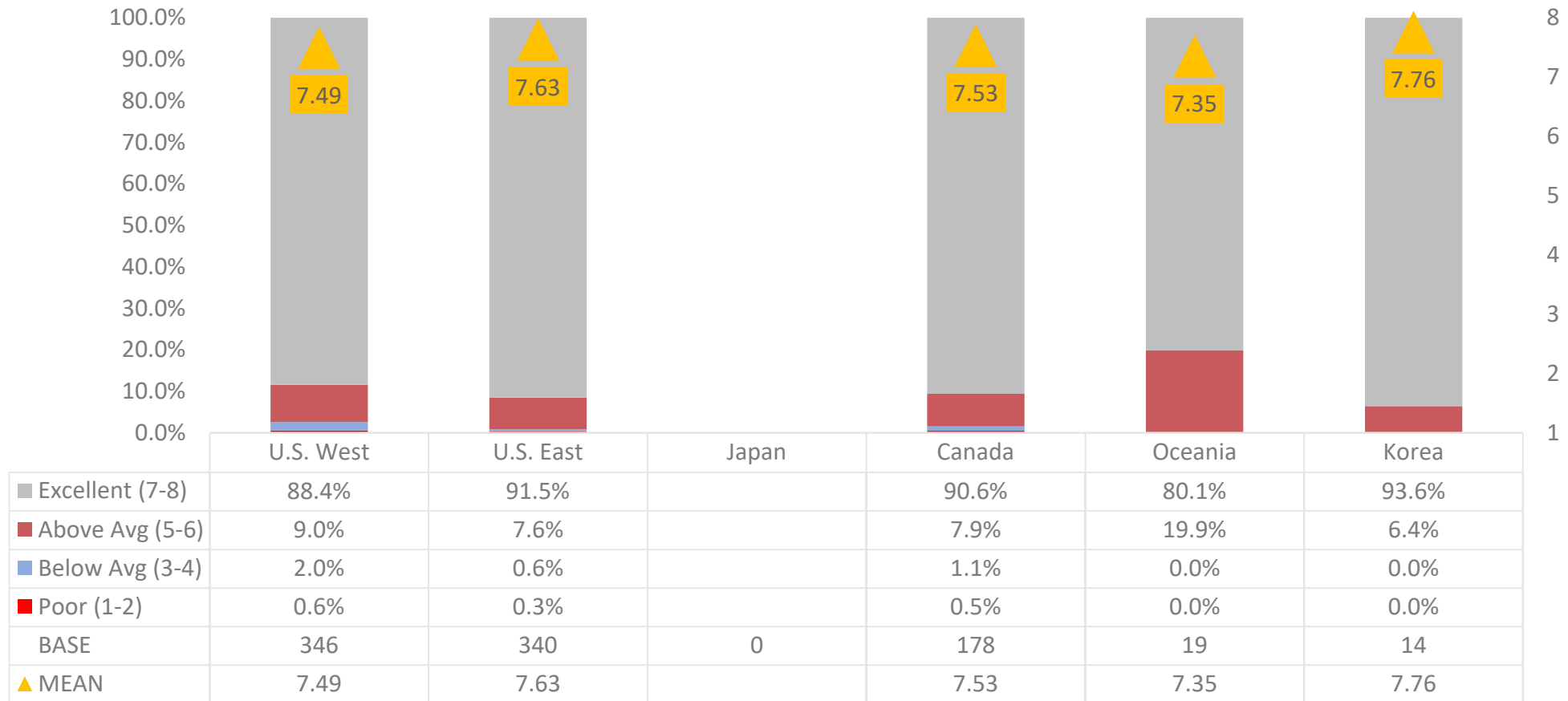
REASONS FOR PARTIAL RENTAL CAR – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Parking was too expensive at my hotel/ lodging	48.6%	39.7%	12.8%	43.1%	27.7%	48.5%
Car rental rates were too expensive	31.9%	19.8%	12.6%	28.8%	22.8%	36.0%
I only needed a vehicle on certain dates	71.0%	72.7%	87.5%	66.0%	75.3%	58.5%
Vehicles were not available for all of my trip dates	0.9%	1.2%	4.1%	2.4%	4.3%	6.5%
BASE	107	159	48	83	70	158

Section 6 – Kauaʻi

SATISFACTION - KAUAI

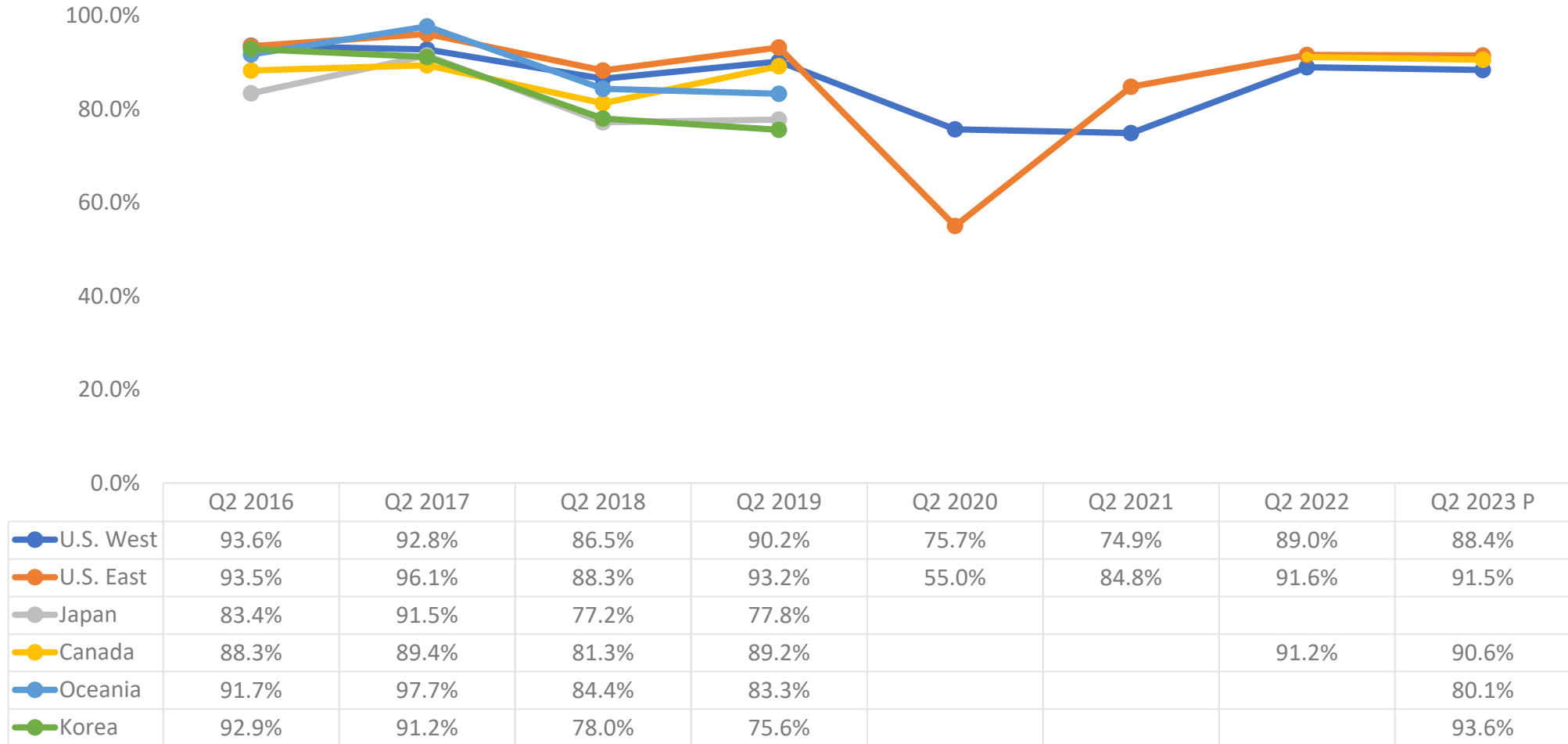
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION – KAUAI

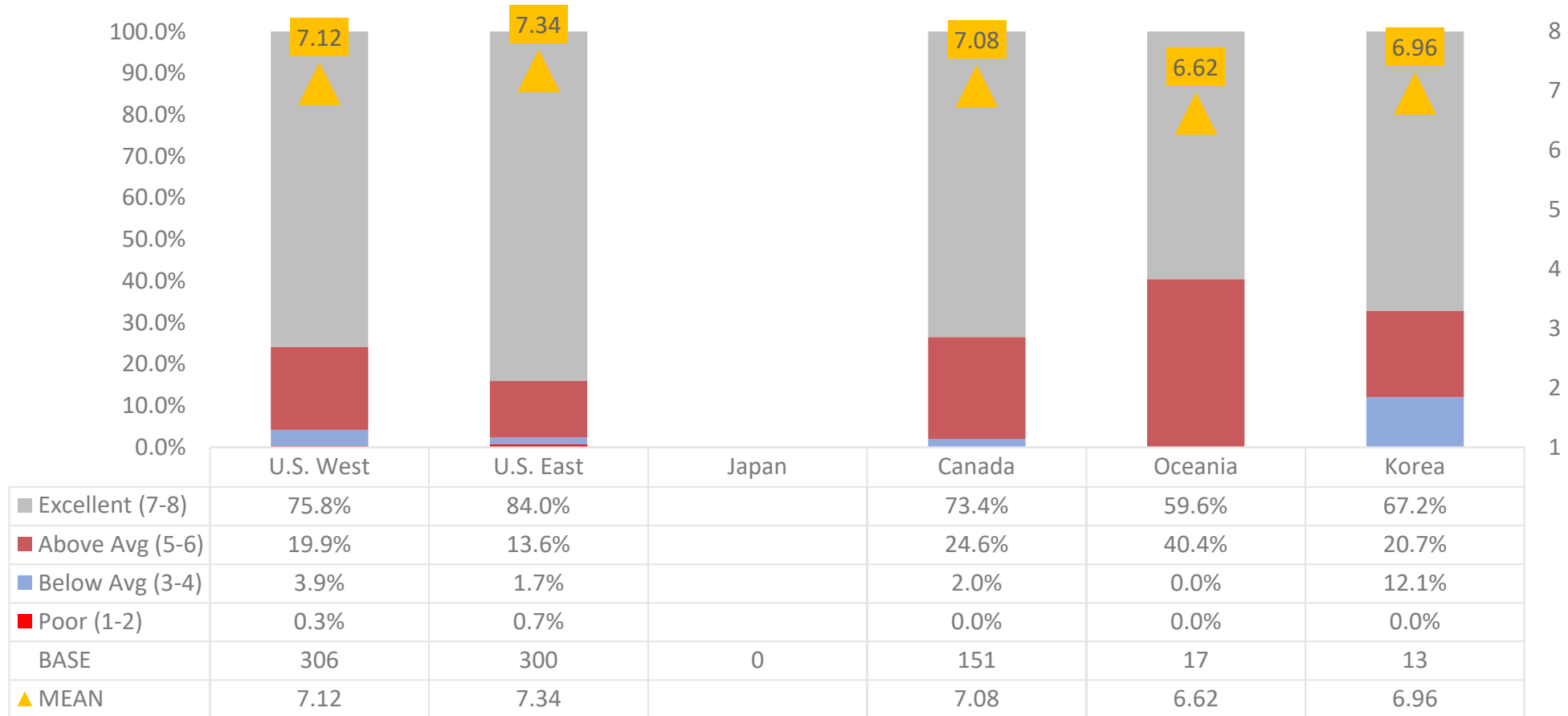
Tracking Data – Rating of “Excellent” (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



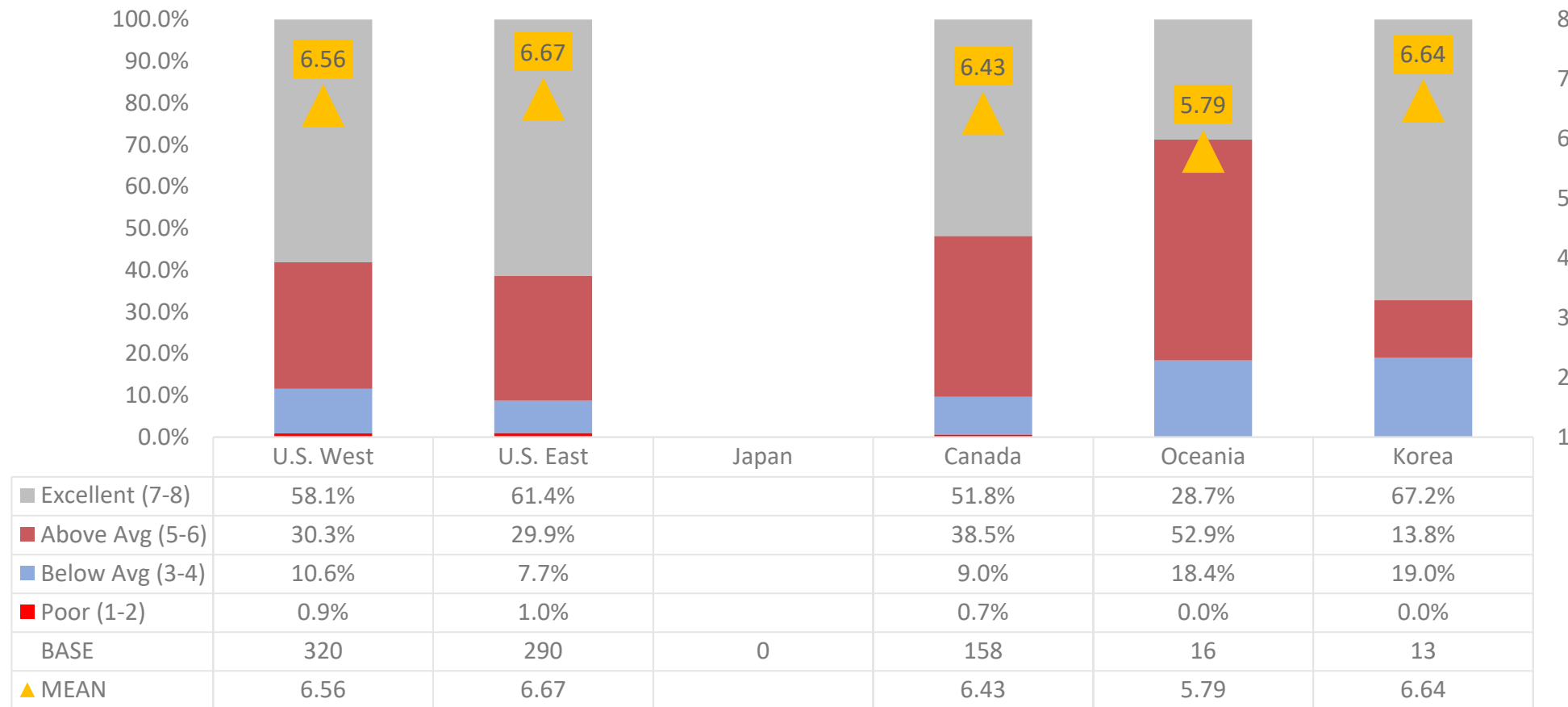
ENTERTAINMENT/ ATTRACTIONS – KAUA‘I

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



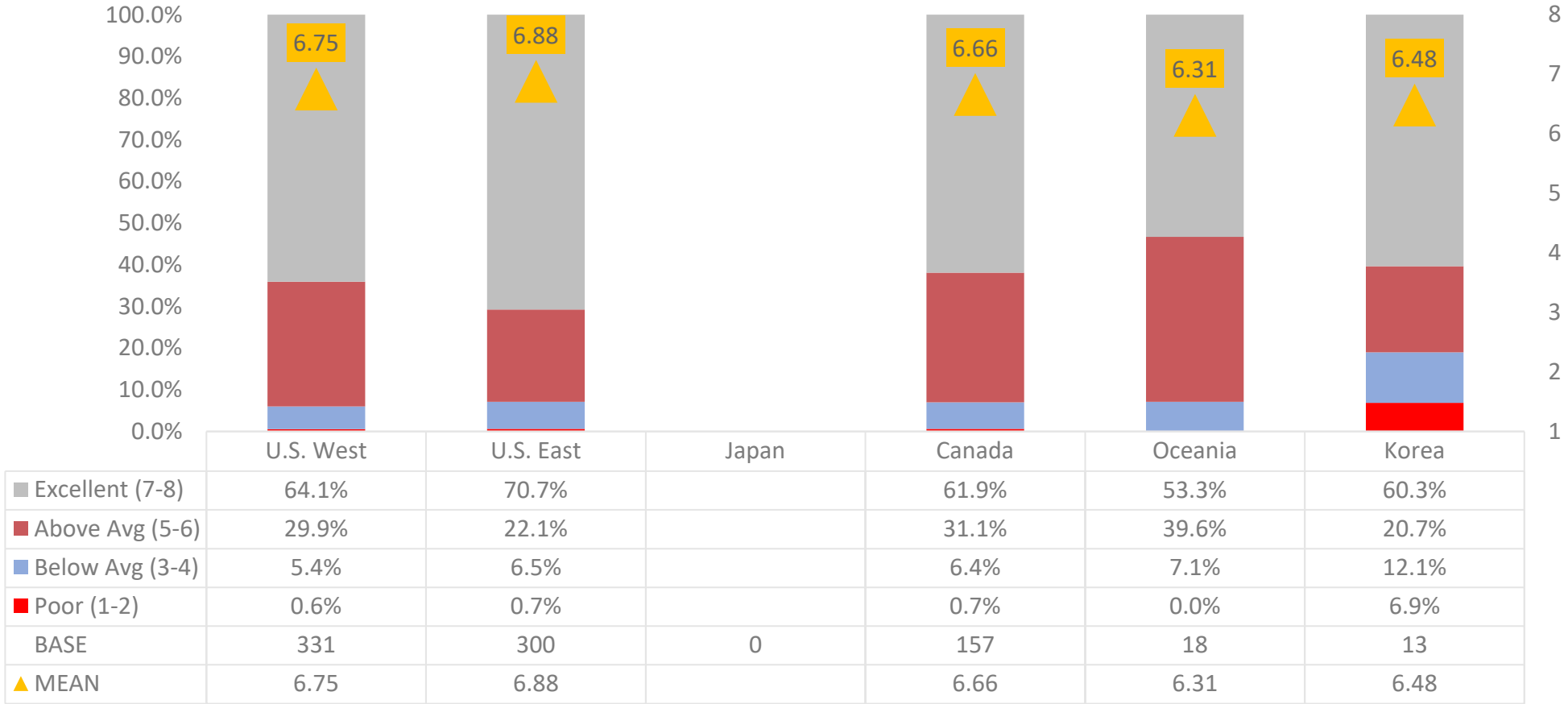
SHOPPING - KAUA'I

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

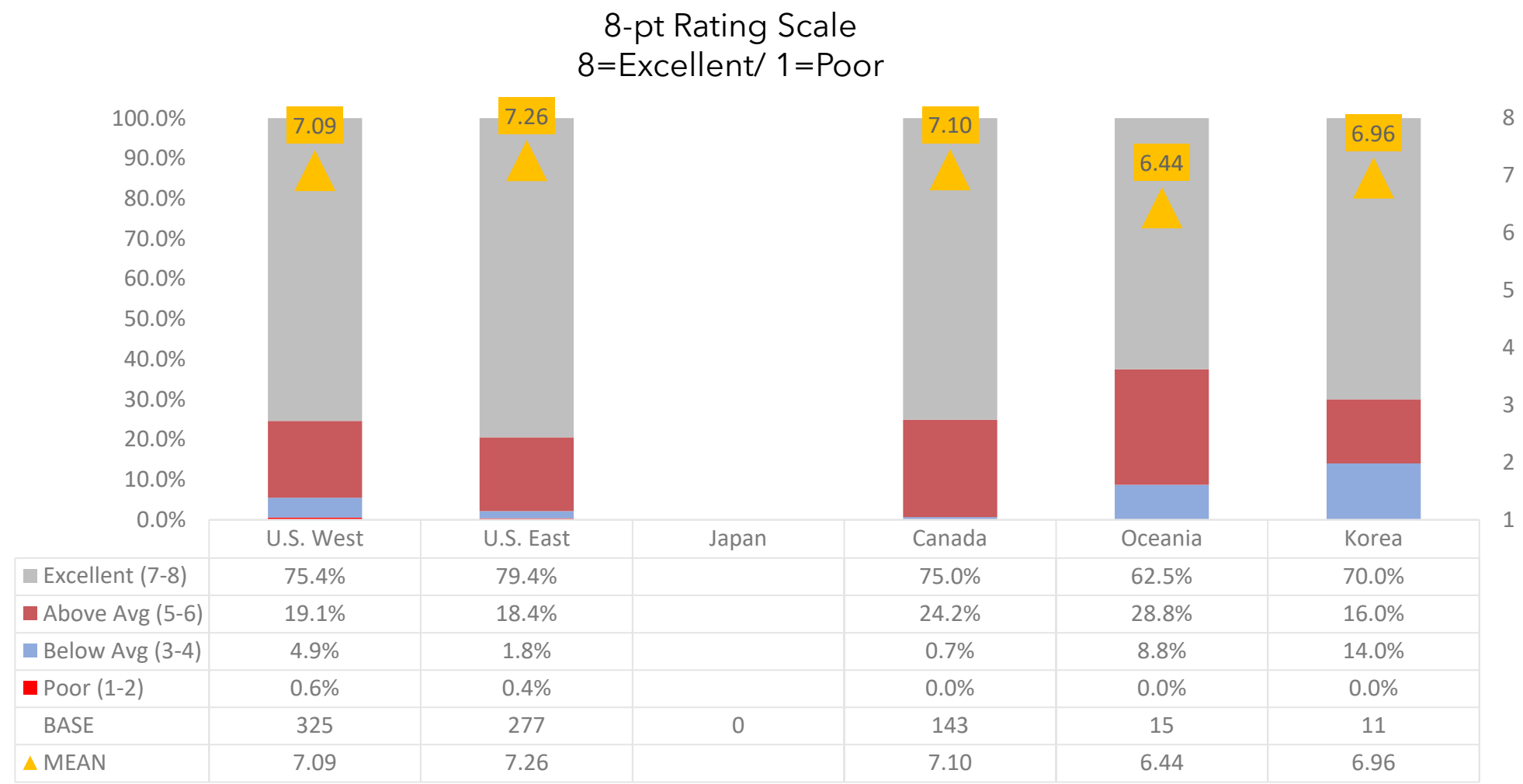


DINING/ FOOD & BEVERAGE - KAUA'I

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

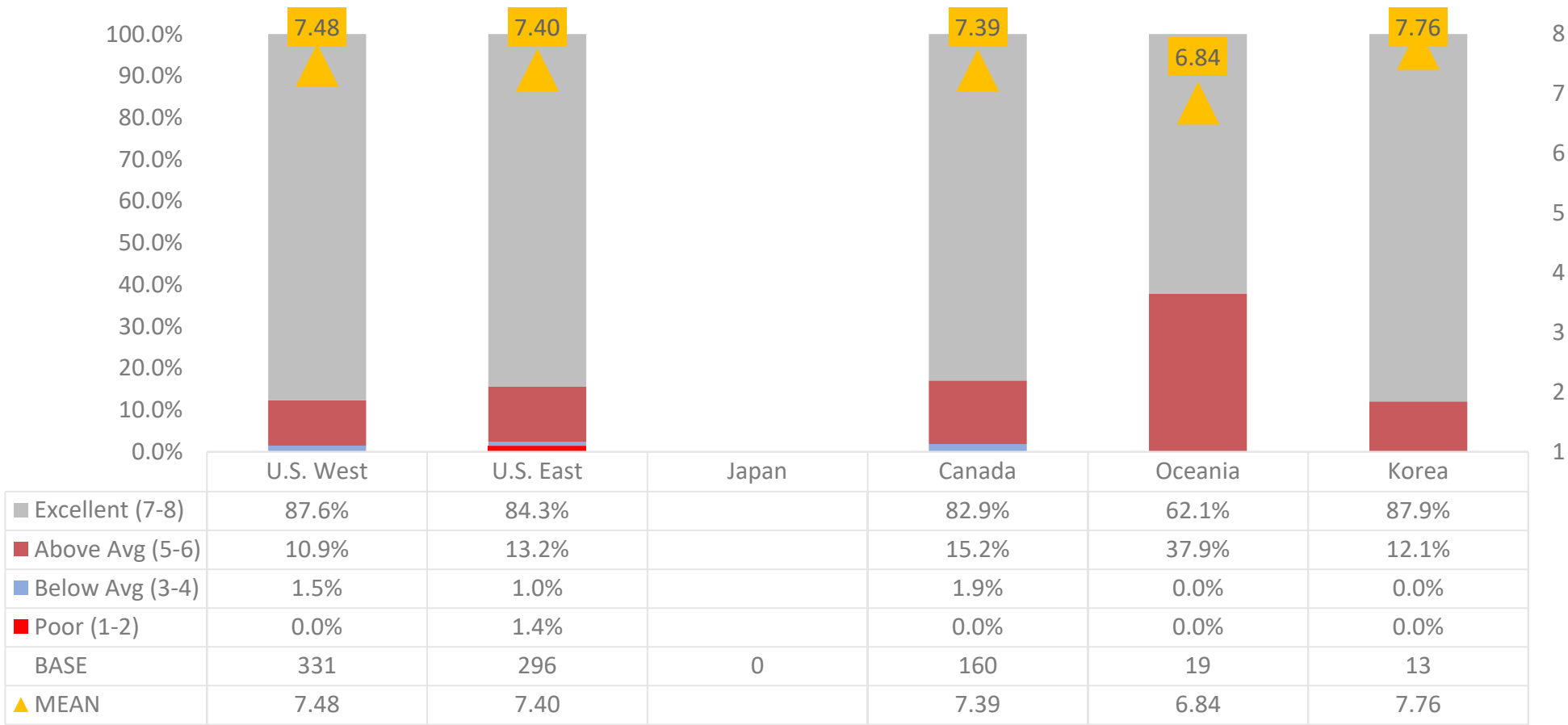


LODGING/ ACCOMMODATIONS – KAUA‘I



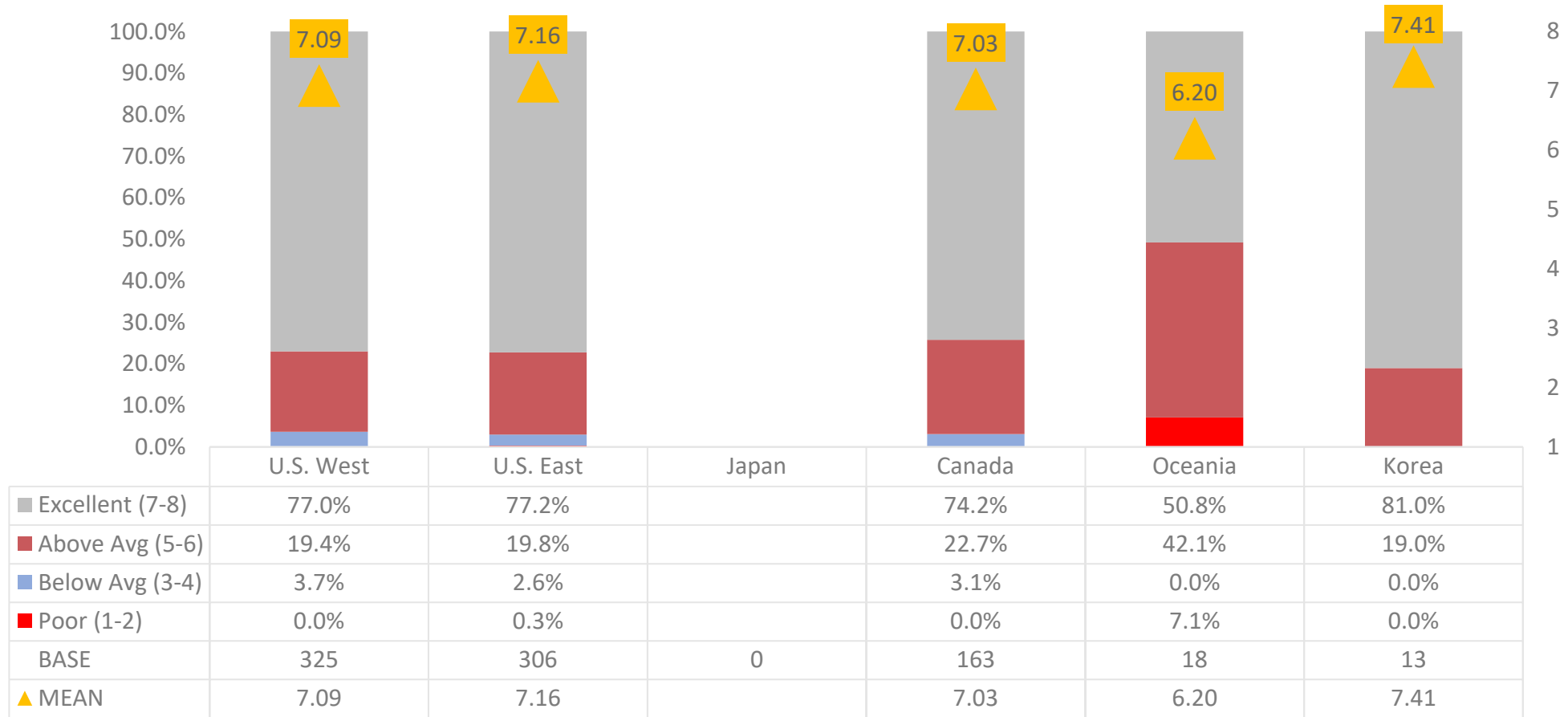
BEACHES - KAUA'I

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



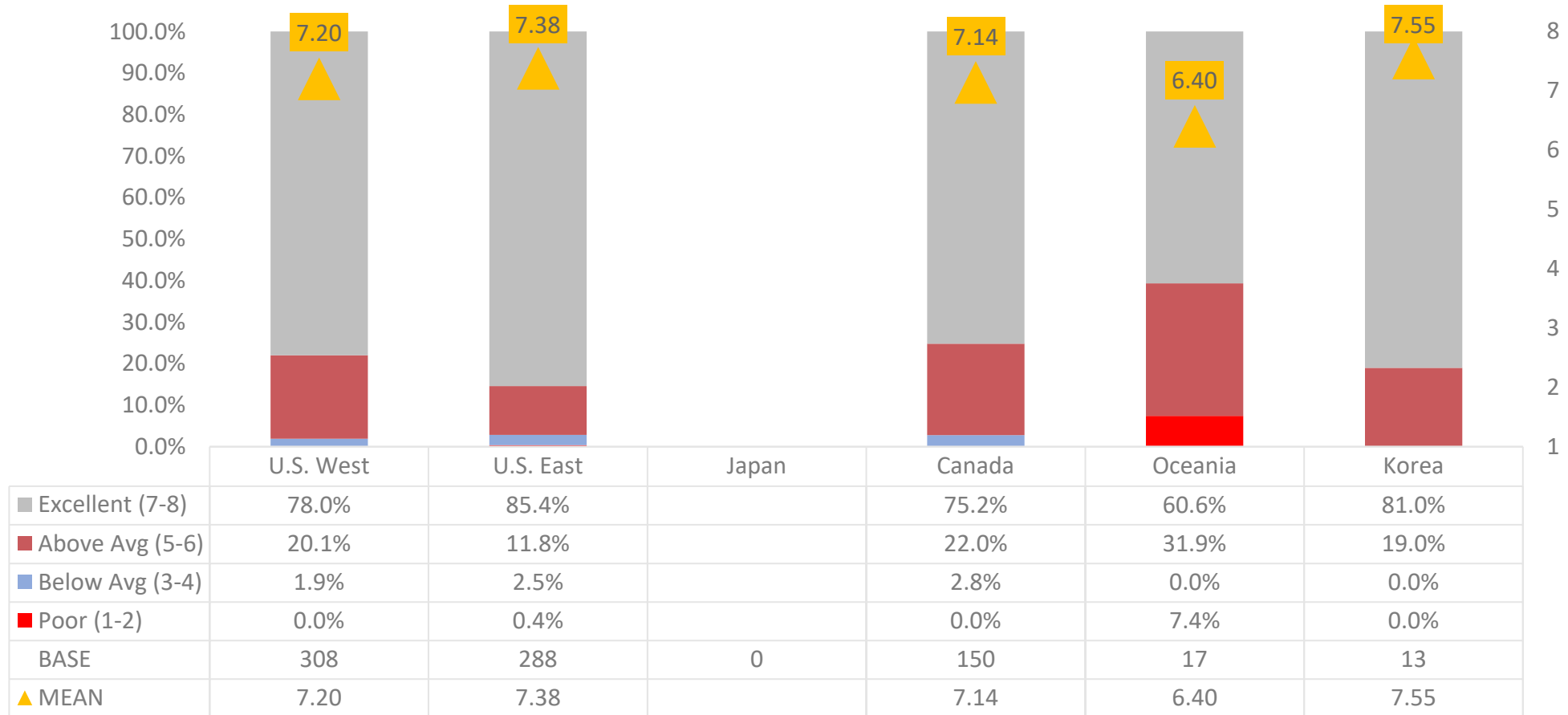
PUBLIC AREAS - KAUA'I

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



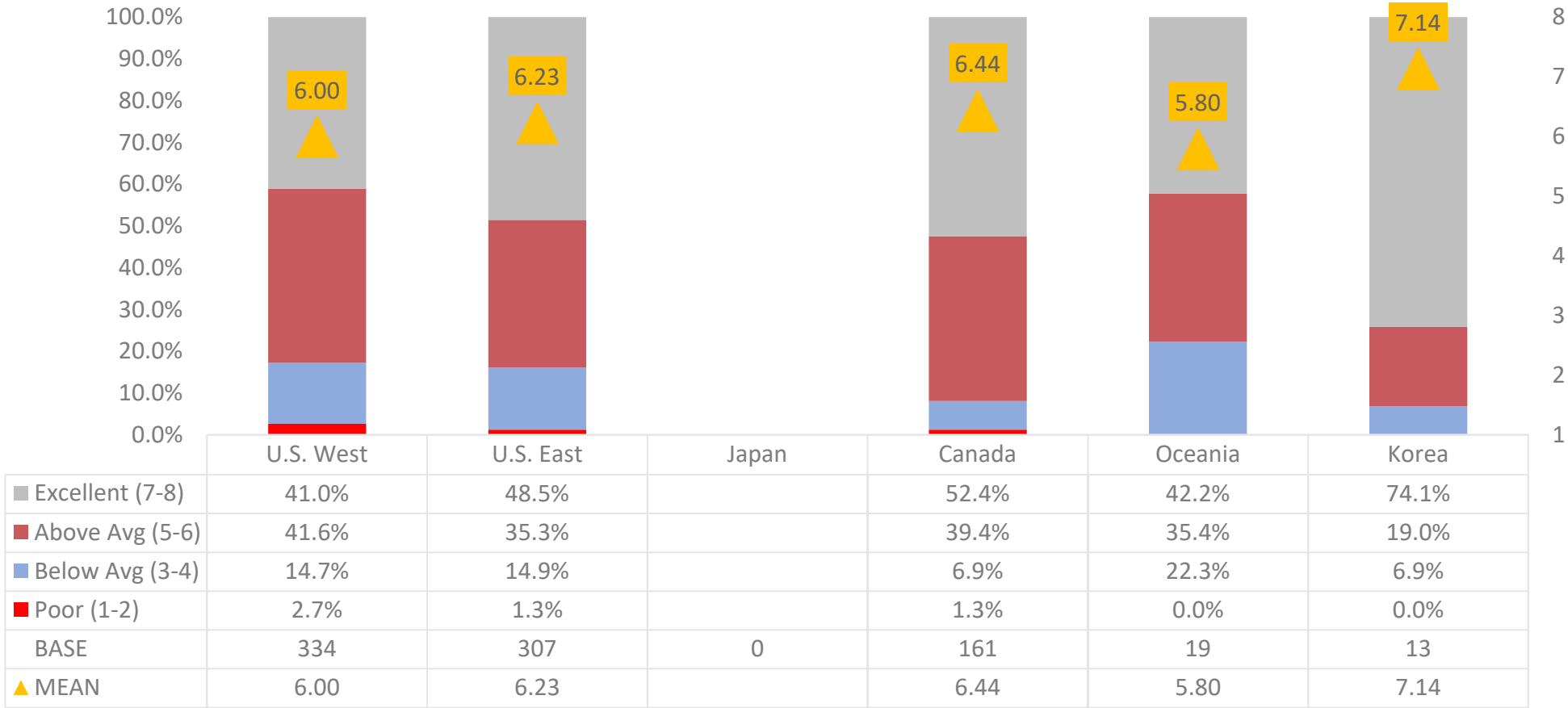
PARKS - KAUAI

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



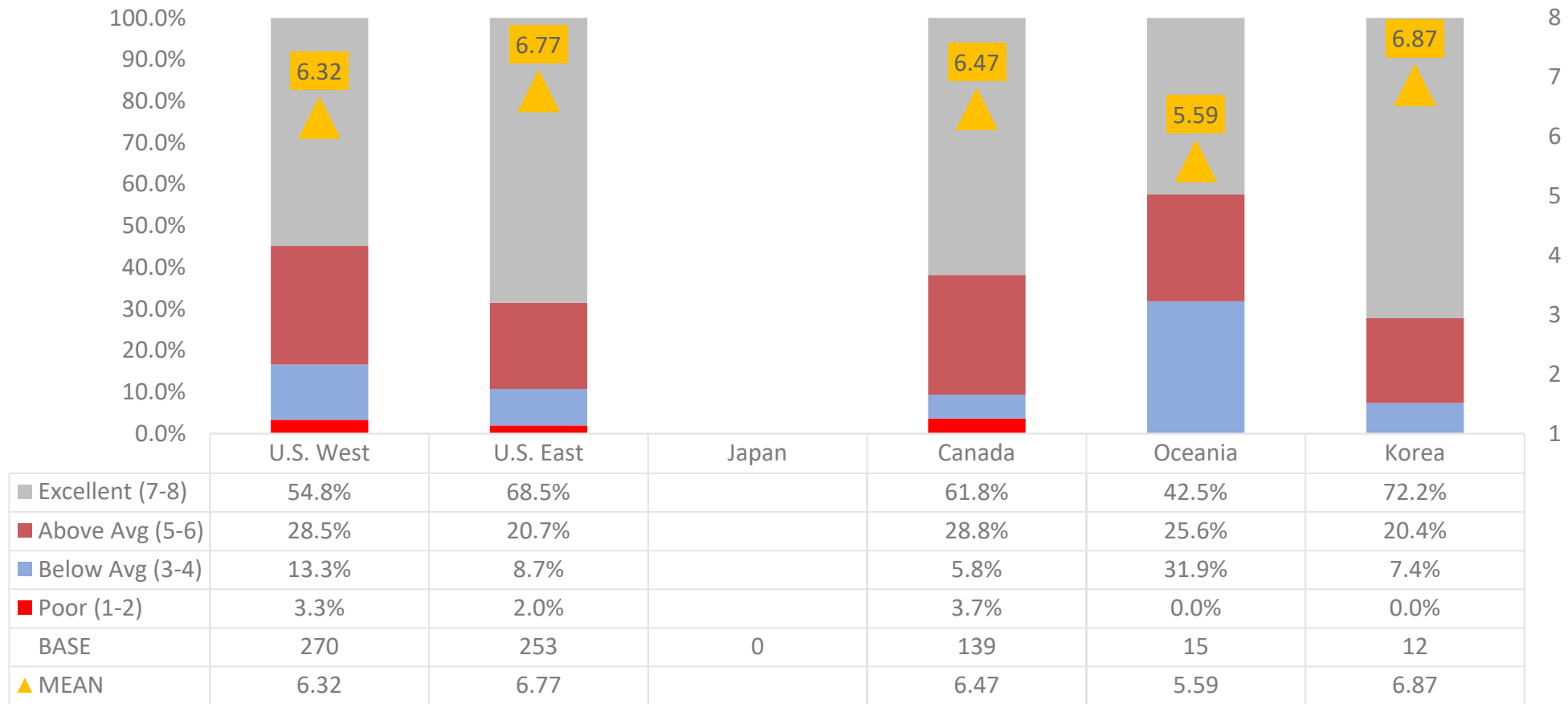
ROADS – KAUA‘I

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



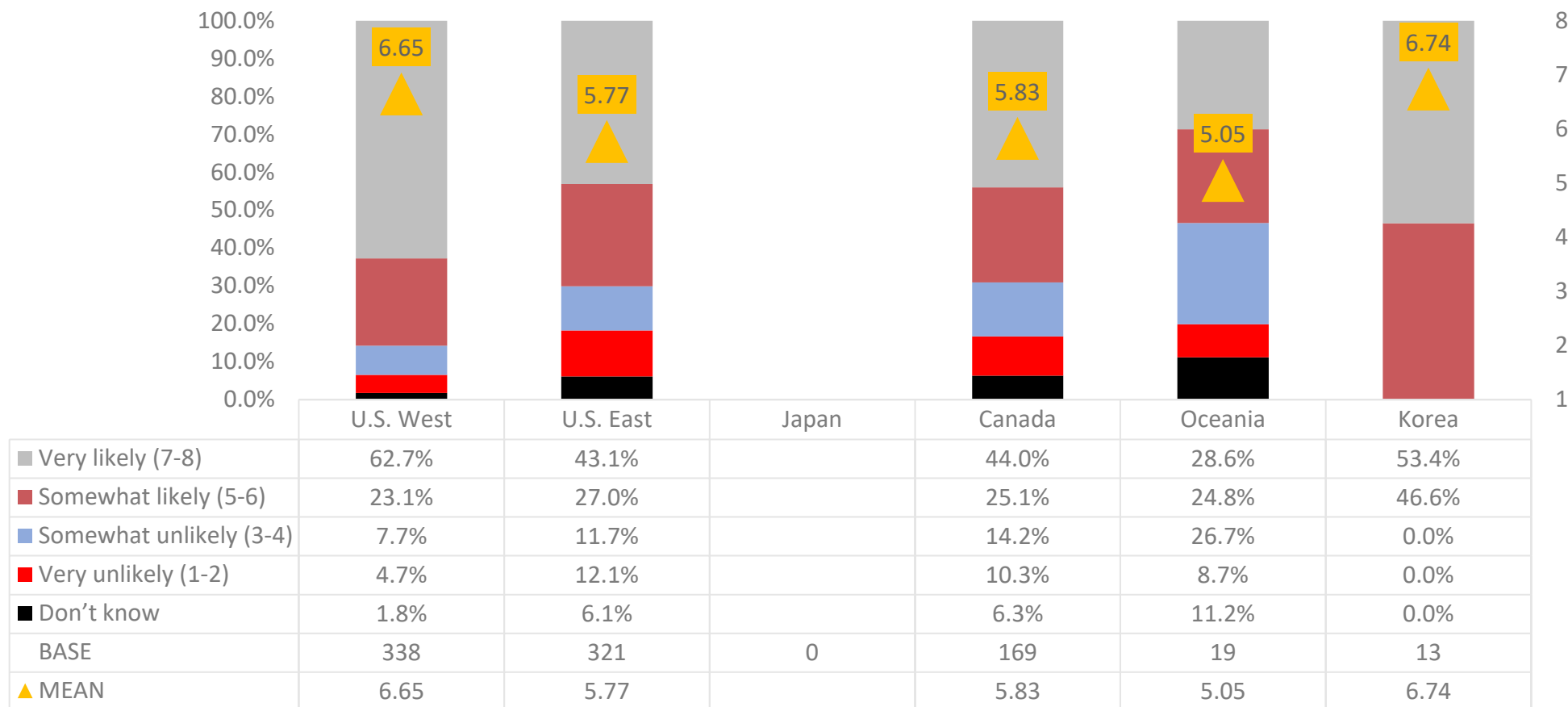
TRANSPORTATION ON ISLAND - KAUA'I

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



LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

100.0%

80.0%

60.0%

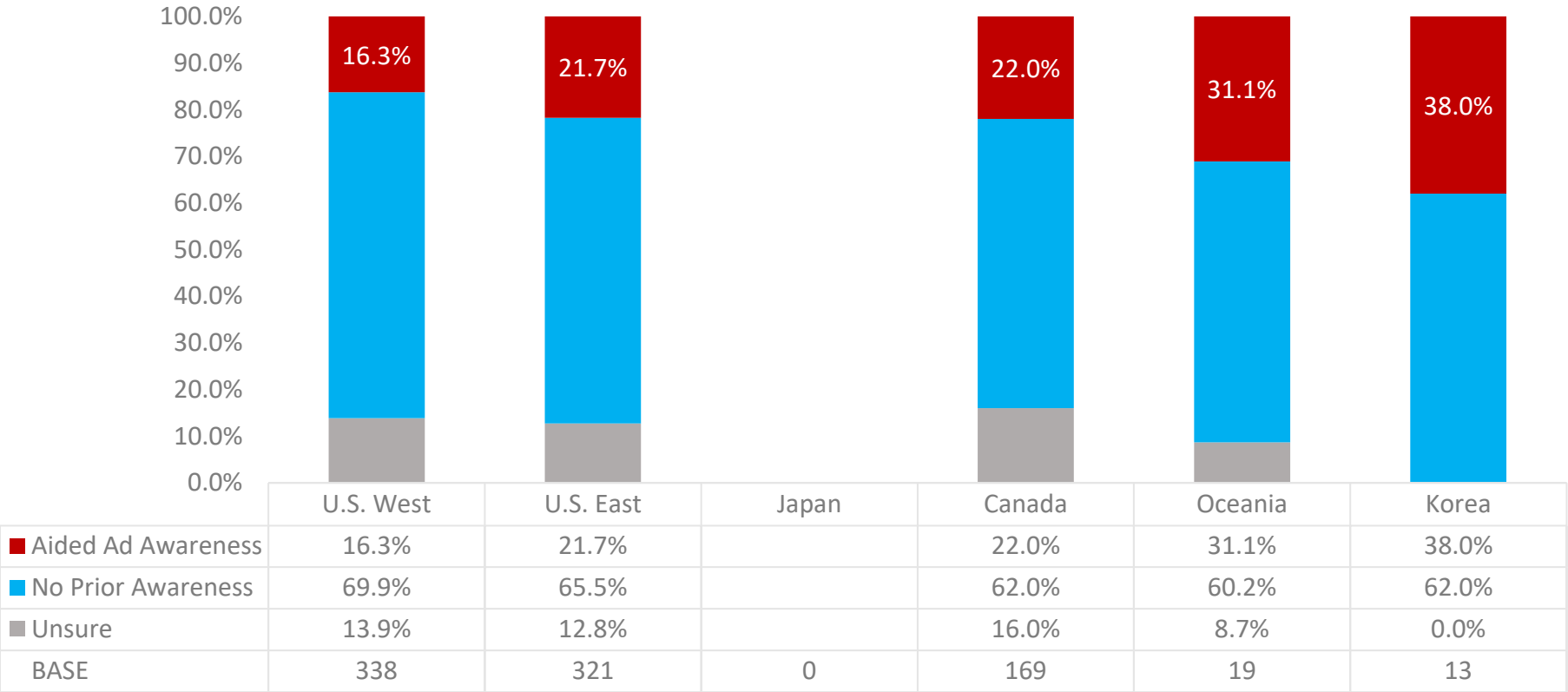
40.0%

20.0%

0.0%

	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	53.4%	66.9%	83.1%	63.3%	67.7%	62.7%
U.S. East	34.8%	41.8%	55.0%	47.3%	40.7%	43.1%
Japan	75.8%	77.8%				
Canada	42.1%	41.6%			48.3%	44.0%
Oceania	34.2%	23.8%				28.6%
Korea	45.1%	61.0%				53.4%

AIDED ADVERTISING AWARENESS - KAUA'I



MOTIVATING FACTORS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	42.0%	51.2%	0.0%	47.3%	37.9%	58.7%
Hawaiian cultural events	5.3%	9.0%	0.0%	5.7%	0.0%	6.9%
Outdoor or sporting activities and events	15.7%	16.4%	0.0%	17.1%	11.2%	0.0%
Social media posts and videos	6.8%	7.9%	0.0%	8.7%	0.0%	13.8%
Hawaiian music	4.1%	3.5%	0.0%	4.2%	0.0%	6.9%
Television programs or movies filmed in Hawai‘i	3.9%	8.2%	0.0%	5.1%	4.4%	0.0%
BASE	338	321	0	169	19	13

ATTRACTIONS – KAUAI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Fern Grotto	8.0%	9.6%	0.0%	6.5%	24.3%	0.0%
Hanalei Town	60.6%	50.3%	0.0%	54.8%	42.2%	19.0%
Hanalei Beach	50.9%	44.5%	0.0%	53.9%	49.0%	25.9%
Kalapaki Beach	19.5%	23.1%	0.0%	24.6%	24.3%	6.9%
Kalalau Trail	13.6%	14.6%	0.0%	17.8%	11.2%	12.1%
Bike Path in Kapa'a	9.5%	10.3%	0.0%	9.0%	0.0%	0.0%
Kaua'i Museum	4.1%	4.0%	0.0%	2.9%	4.4%	0.0%
Ke'e Beach	14.8%	12.8%	0.0%	12.3%	13.6%	6.9%
Kīlauea Lighthouse	27.8%	30.0%	0.0%	28.2%	15.5%	19.0%
Koke'e	8.6%	9.8%	0.0%	10.2%	8.7%	6.9%

ATTRACTIONS – KAUAI

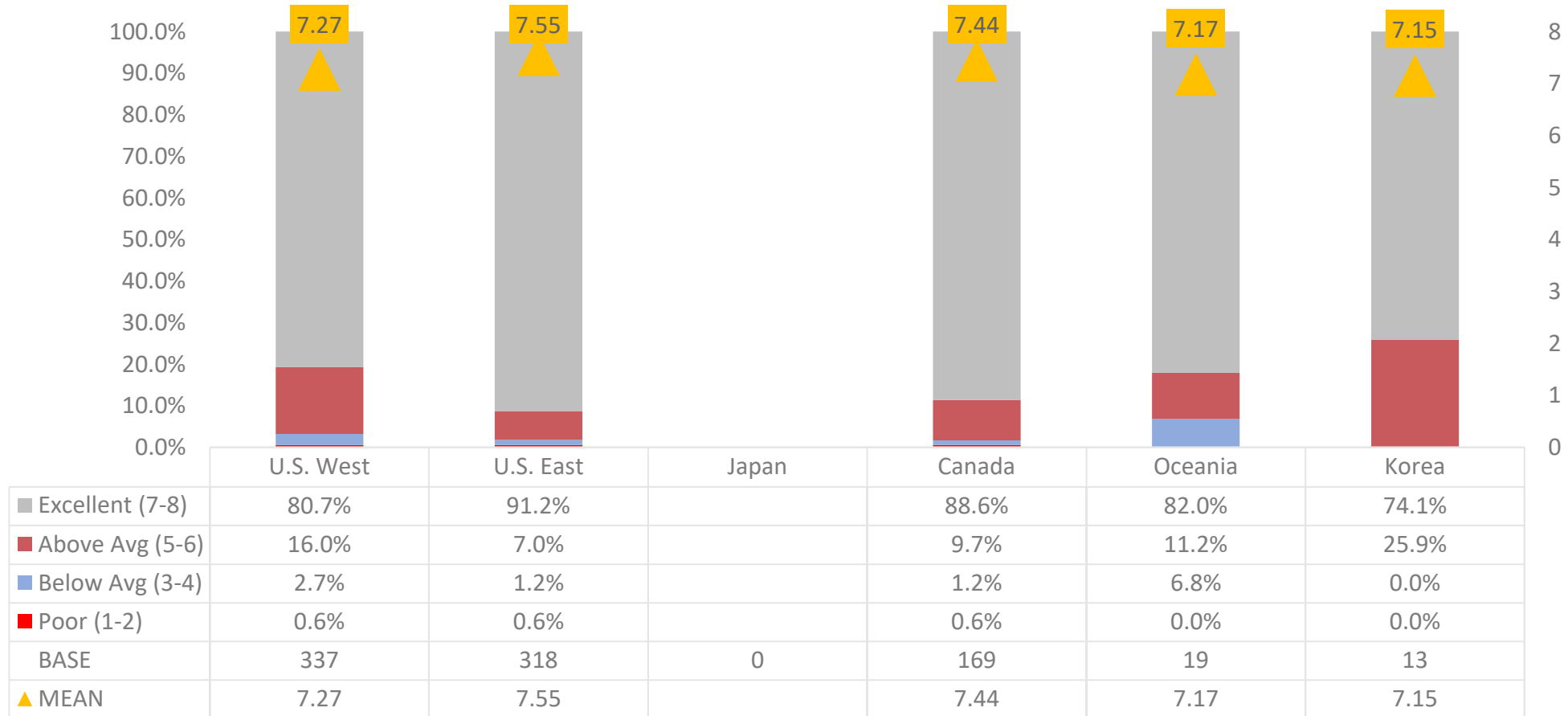
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Koke'e Museum	5.3%	4.2%	0.0%	5.3%	8.7%	6.9%
Na 'Āina Kai Gardens	0.9%	3.1%	0.0%	1.7%	4.4%	0.0%
Nāpali Coast	45.3%	60.7%	0.0%	49.5%	53.4%	13.8%
Allerton Garden	7.7%	8.6%	0.0%	5.4%	8.7%	6.9%
Limahuli Garden	5.3%	6.9%	0.0%	5.9%	0.0%	6.9%
Old Kōloa Town	46.4%	25.8%	0.0%	32.5%	24.3%	12.1%
Opaeka'a Falls	20.1%	23.5%	0.0%	19.6%	11.2%	6.9%
Po'ipū Beach	65.3%	55.5%	0.0%	57.2%	44.7%	58.7%
Smith's Tropical Paradise Gardens	8.9%	9.1%	0.0%	2.9%	4.4%	0.0%
Spouting Horn	33.1%	33.4%	0.0%	30.0%	19.9%	25.9%
Wailua Falls	37.9%	42.8%	0.0%	30.8%	35.4%	39.7%

ATTRACTIONS – KAUUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Wailua River	21.0%	19.3%	0.0%	14.1%	15.5%	0.0%
Waimea Canyon	51.8%	59.1%	0.0%	59.3%	53.4%	41.3%
Disc Golf	1.2%	0.6%	0.0%	0.0%	0.0%	0.0%
Mini Golf	3.2%	0.9%	0.0%	1.9%	0.0%	0.0%

FRIENDLINESS OF KAUA'I RESIDENTS

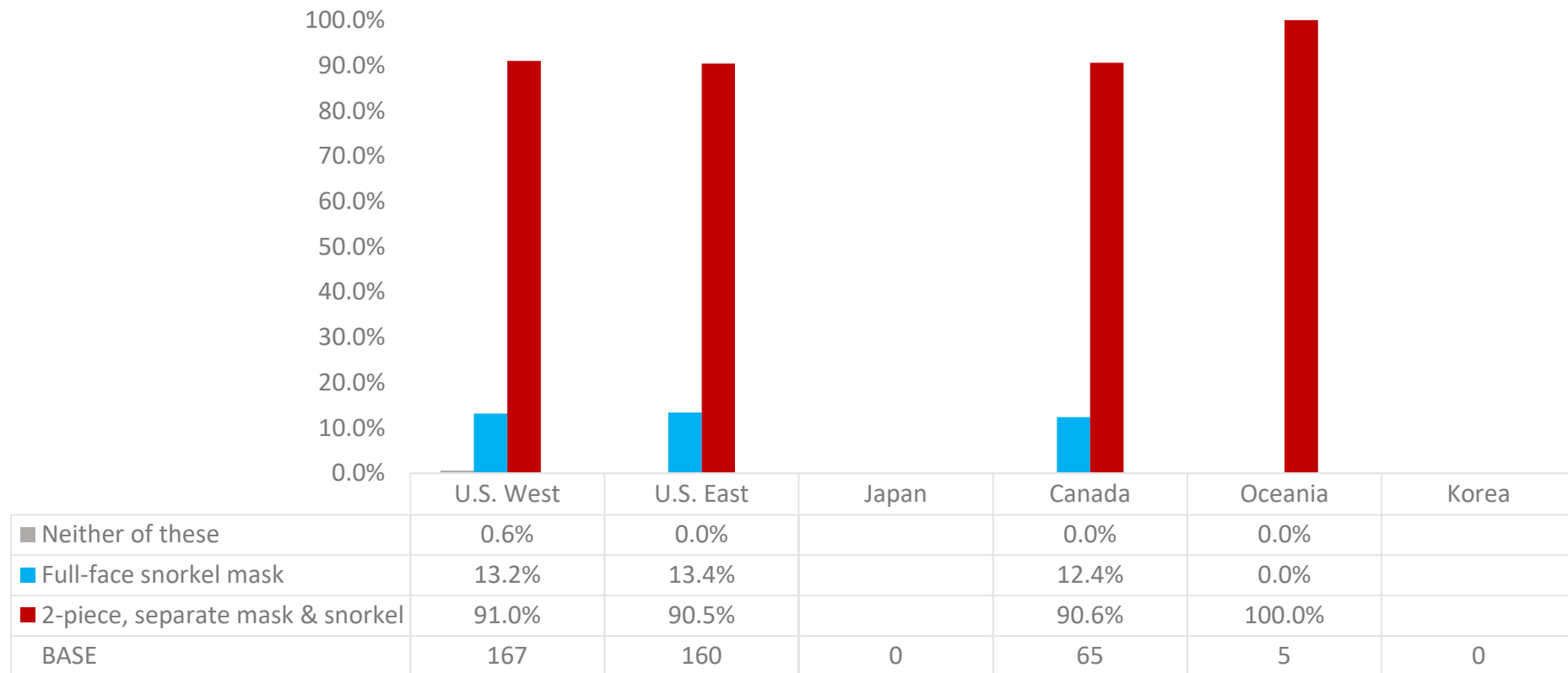
8-pt Rating Scale
8=Excellent/ 1=Poor



TOP TRIP INFLUENCERS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Been here before	40.5%	27.7%	0.0%	27.8%	21.8%	12.1%
Friend recommendation	31.5%	29.8%	0.0%	26.5%	8.7%	13.8%
Cruise line stop/ part of tour	3.3%	13.4%	0.0%	9.6%	24.3%	0.0%
Article/ Blog	3.9%	5.5%	0.0%	3.4%	6.8%	0.0%
Visiting Family/ Friends	3.9%	2.9%	0.0%	2.8%	0.0%	0.0%
Attending Conference/ Event	2.4%	4.3%	0.0%	6.7%	0.0%	0.0%
Own a timeshare	3.3%	2.1%	0.0%	2.4%	0.0%	0.0%
Social Media Post	2.4%	3.4%	0.0%	4.6%	6.8%	13.8%
Nature/ Beauty/ Scenery	1.8%	1.5%	0.0%	2.3%	6.8%	0.0%
Location/ Never been, but went to other islands	1.8%	1.3%	0.0%	3.0%	4.4%	0.0%
Travel Agent	0.3%	2.1%	0.0%	4.4%	6.8%	48.2%

SNORKELING EQUIPMENT USED - KAUA'I



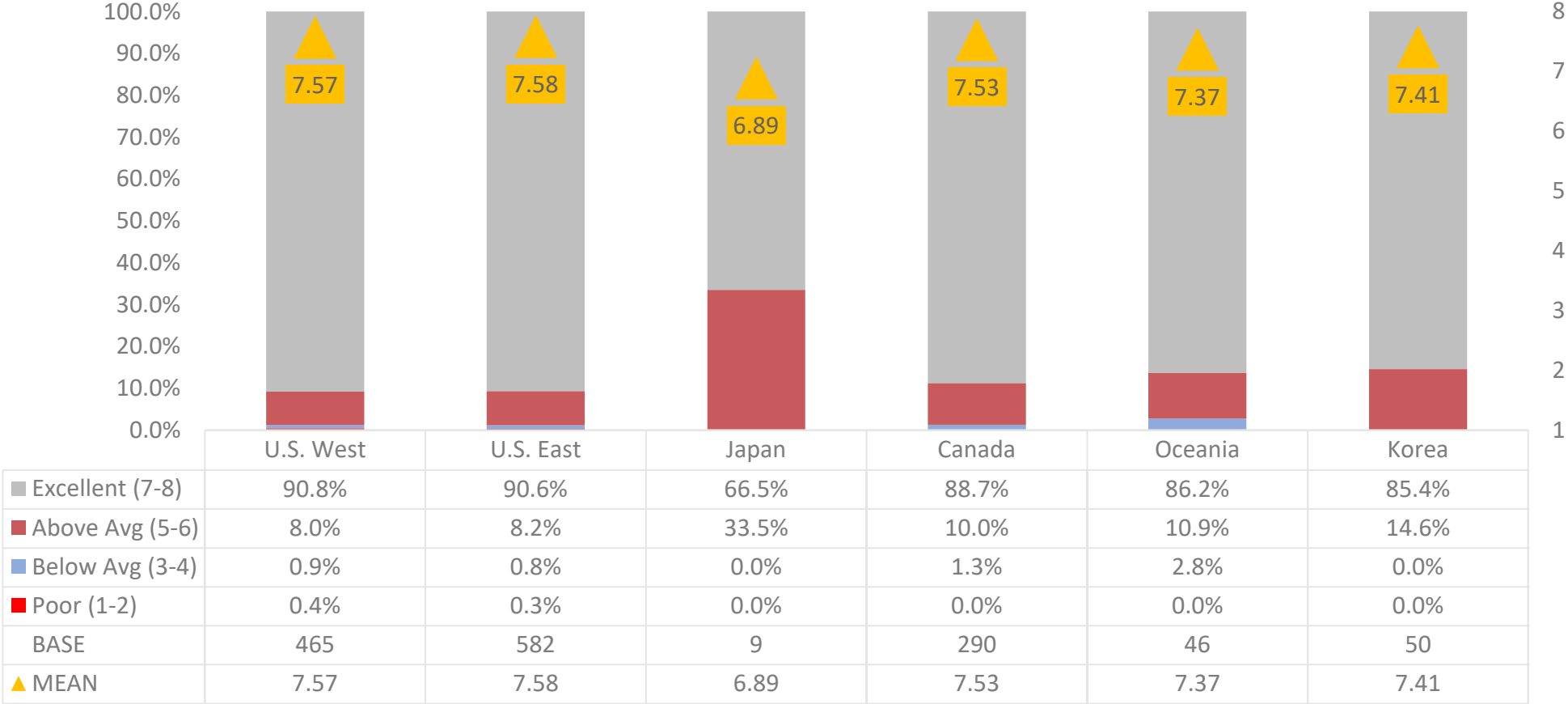
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	100.0%	98.7%	0.0%	97.0%	100.0%	0.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.0%	1.3%	0.0%	1.4%	0.0%	0.0%
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%
BASE	165	160	0	65	5	0

Section 7 – Maui

SATISFACTION - MAUI

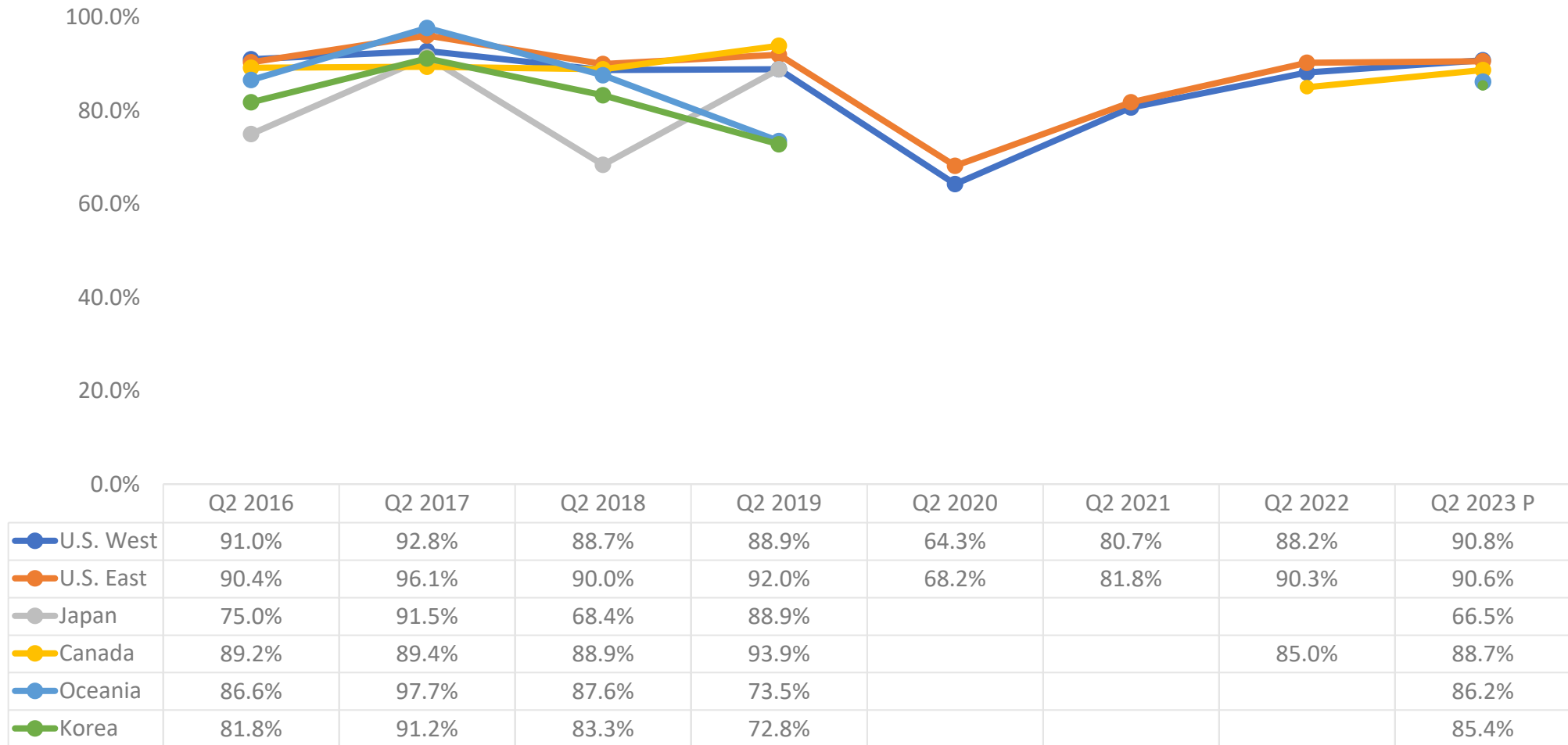
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION – MAUI

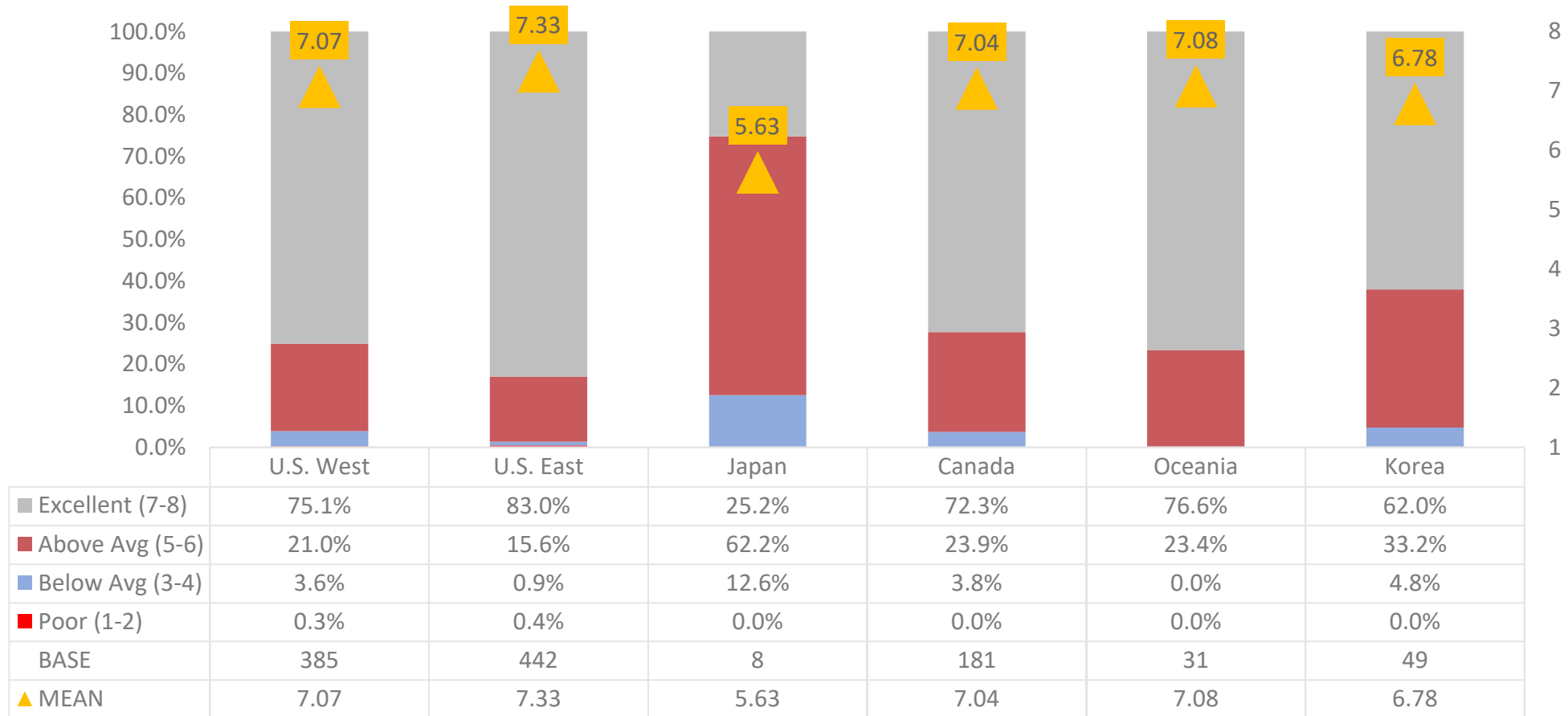
Tracking Data – Rating of “Excellent” (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



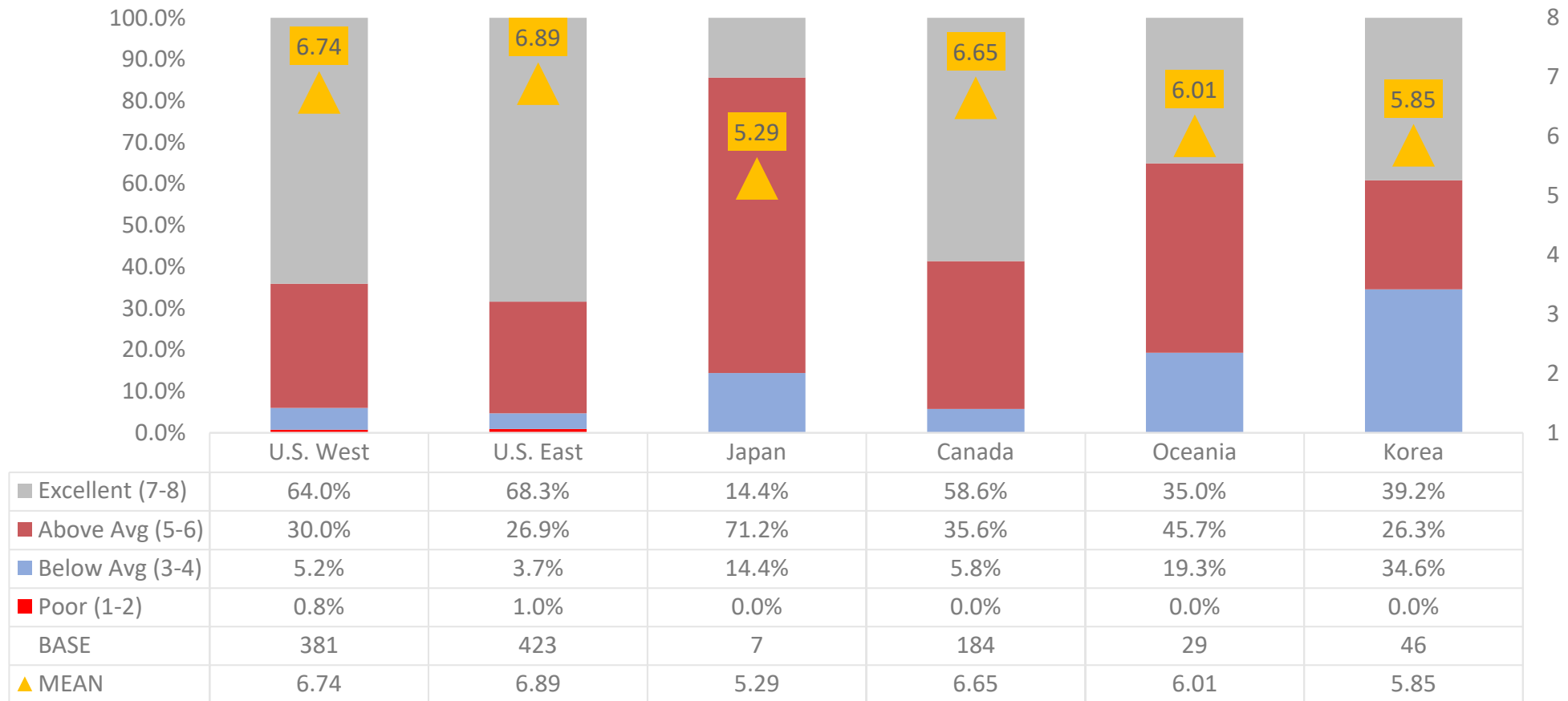
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



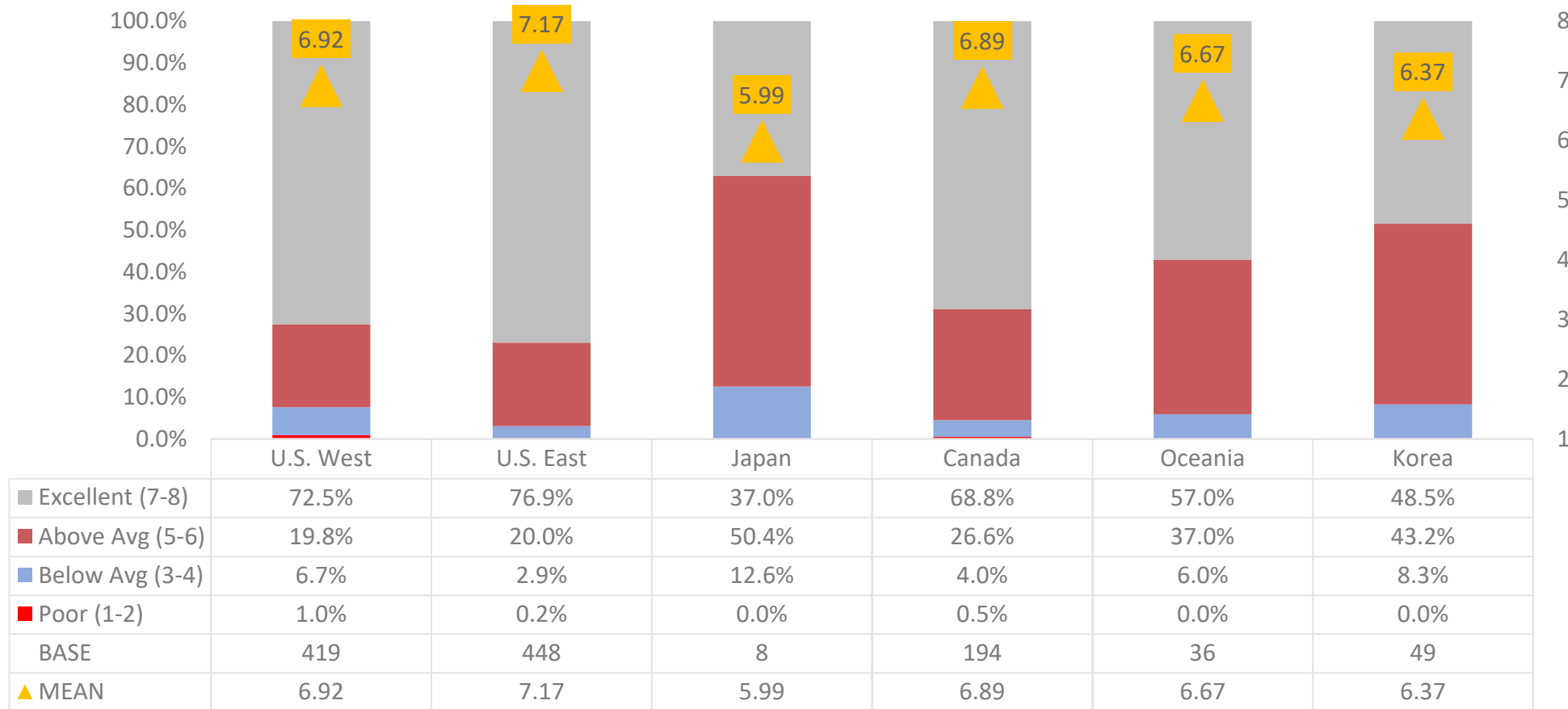
SHOPPING - MAUI

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



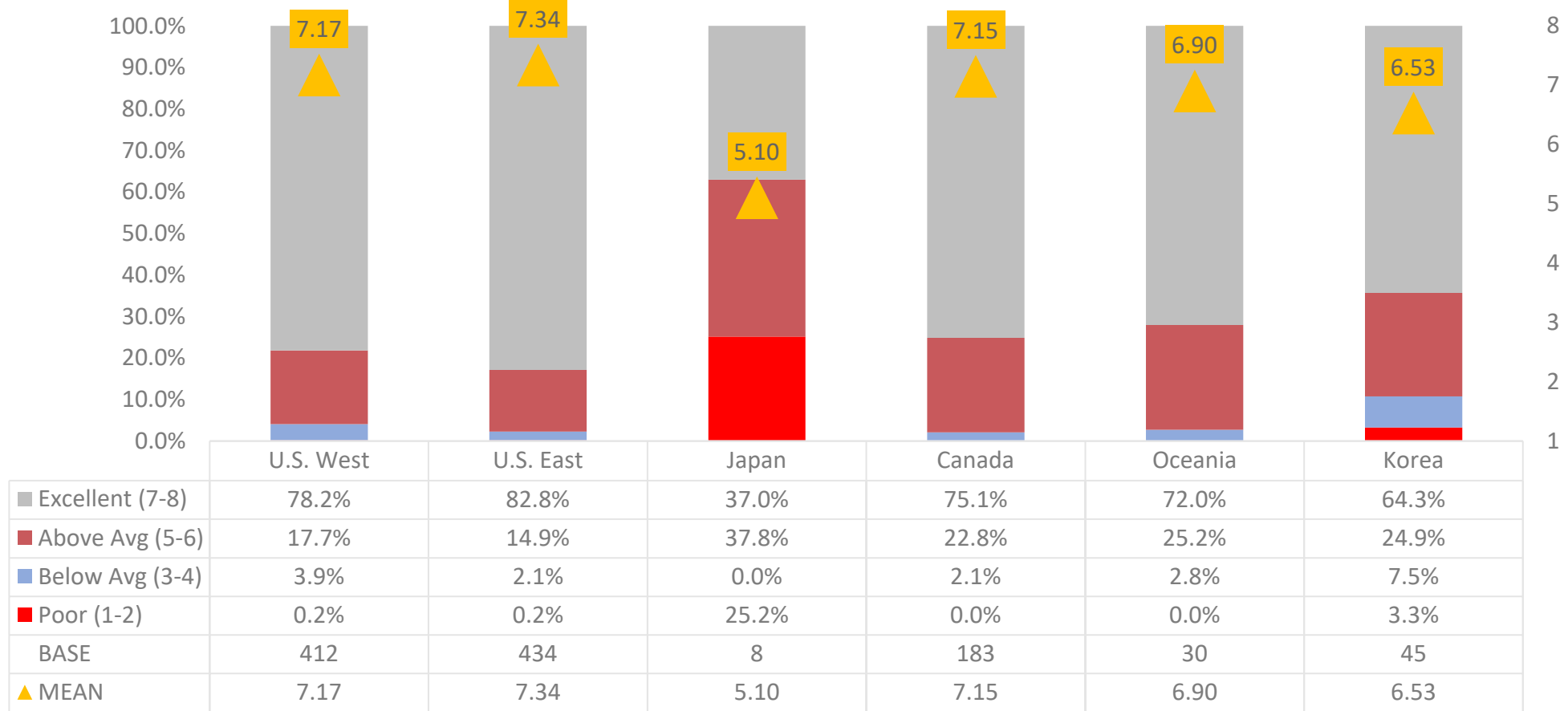
DINING/ FOOD & BEVERAGE - MAUI

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



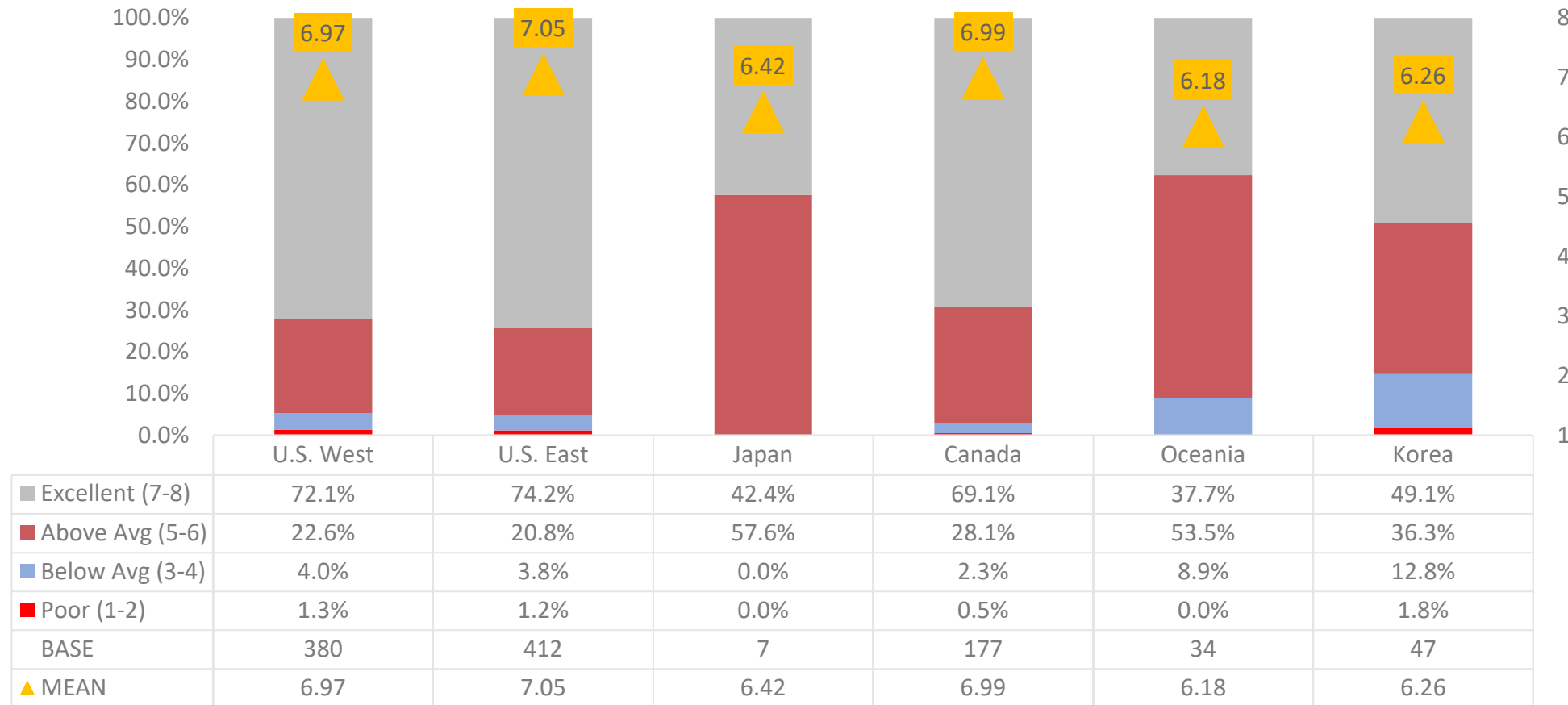
LODGING/ ACCOMMODATIONS - MAUI

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



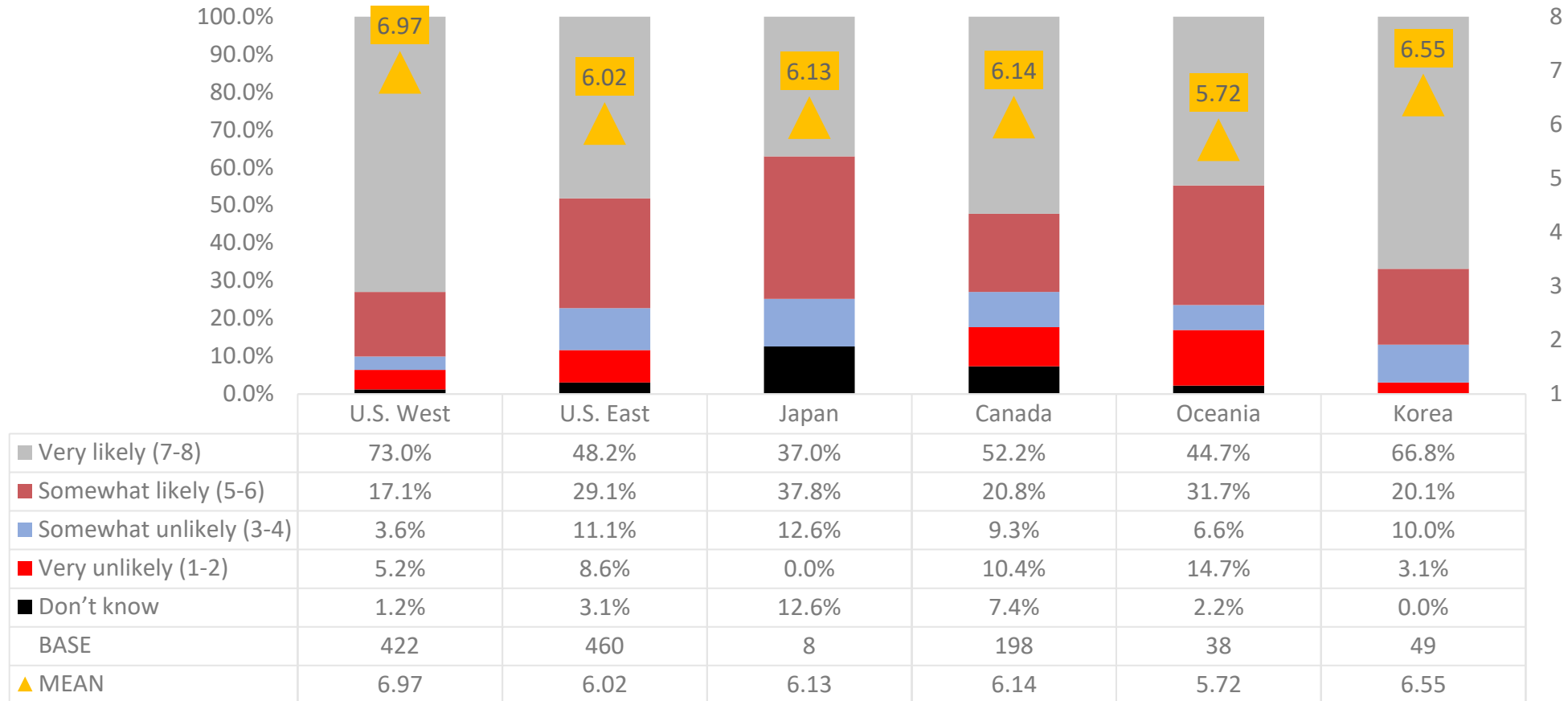
TRANSPORTATION ON ISLAND - MAUI

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



LIKELIHOOD OF RETURN VISIT – MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

100.0%

80.0%

60.0%

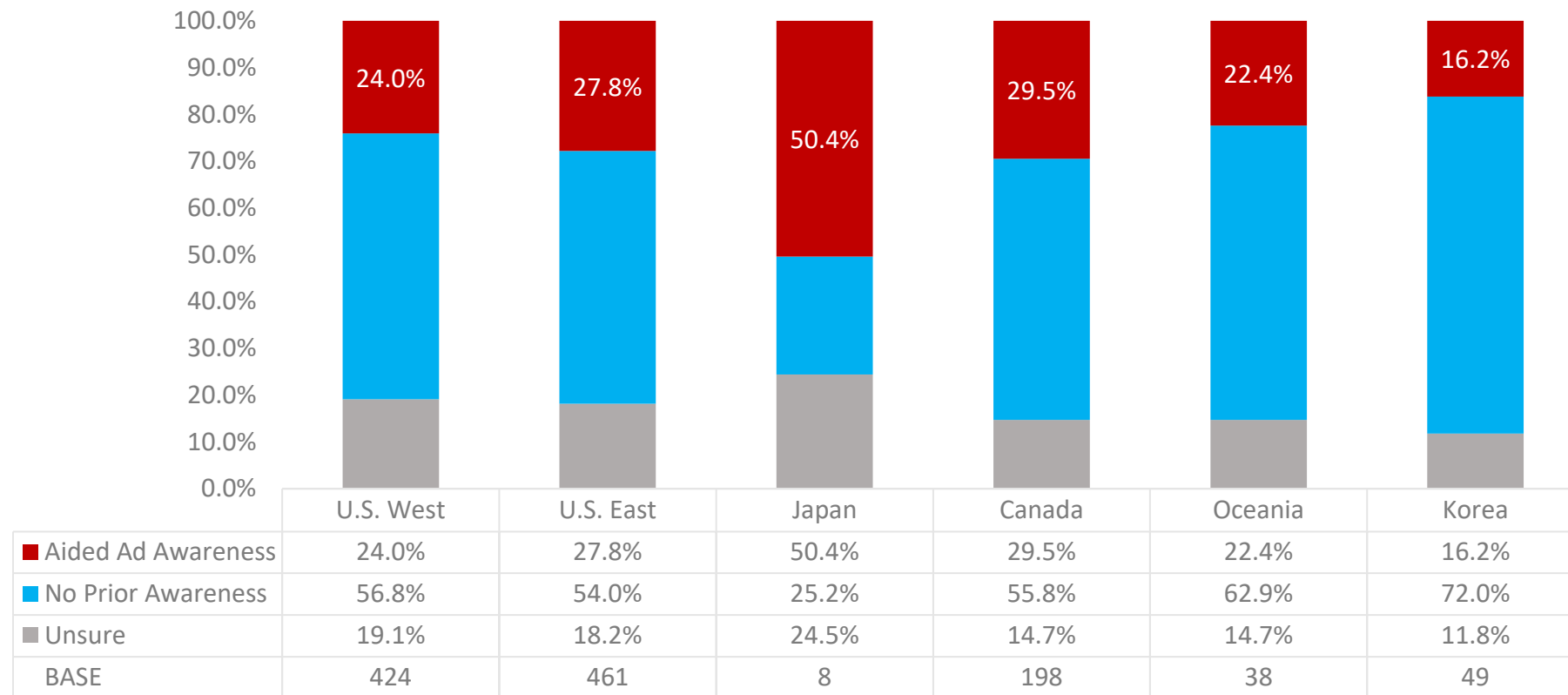
40.0%

20.0%

0.0%

	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	66.1%	72.7%	82.8%	69.2%	66.0%	73.0%
U.S. East	50.4%	49.3%	75.6%	49.1%	52.1%	48.2%
Japan	51.8%	39.7%				37.0%
Canada	54.4%	66.6%			61.6%	52.2%
Oceania	45.9%	38.5%				44.7%
Korea	50.8%	55.2%				66.8%

AIDED ADVERTISING AWARENESS - MAUI



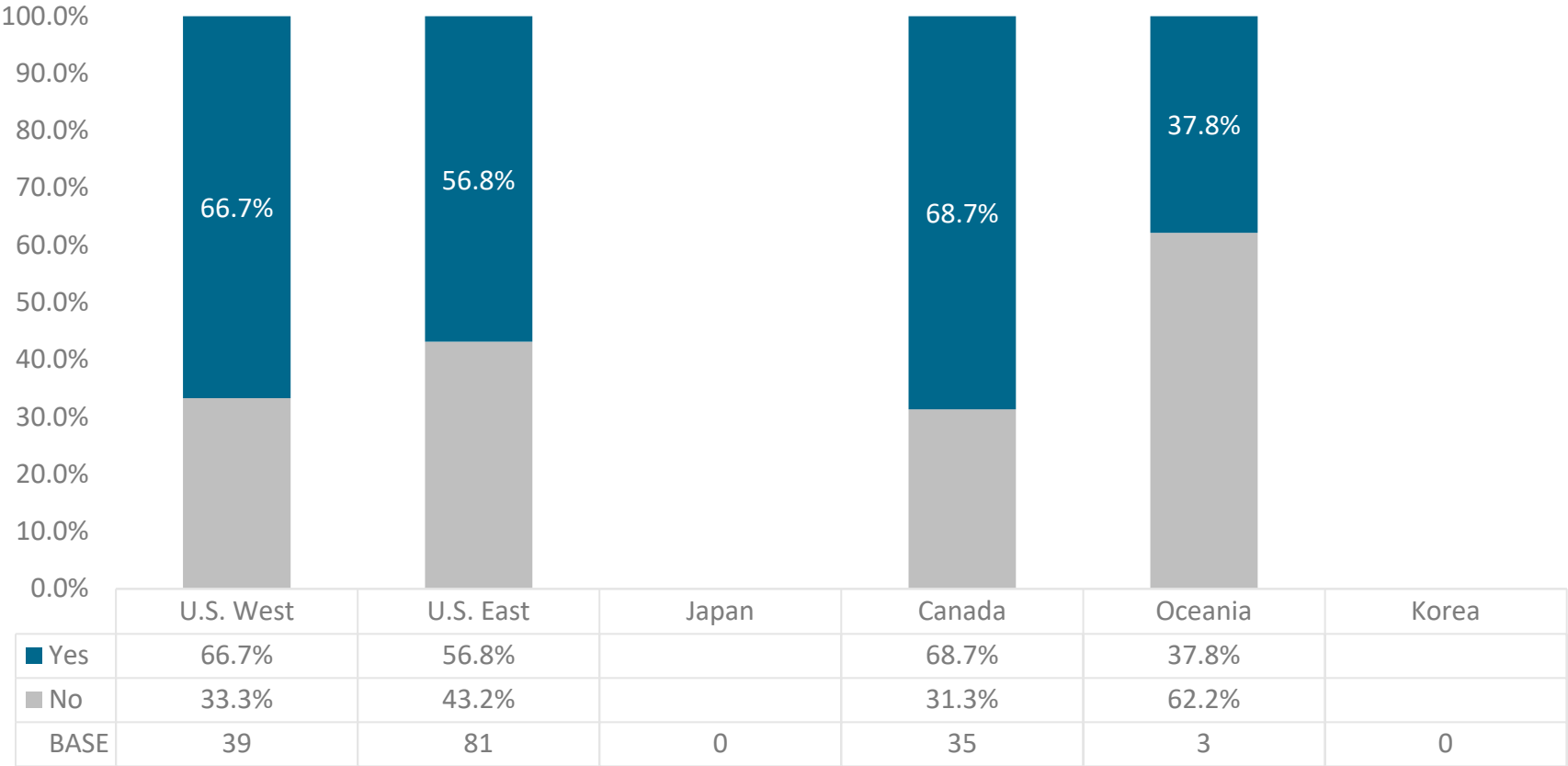
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	33.3%	41.0%	12.6%	42.7%	24.8%	48.0%
Hawaiian cultural events	10.1%	11.8%	0.0%	10.2%	12.5%	0.0%
Outdoor or sporting activities and events	16.3%	12.2%	12.6%	13.2%	6.6%	9.6%
Social media posts and videos	12.0%	15.5%	12.6%	18.0%	18.2%	30.6%
Hawaiian music	6.4%	6.3%	12.6%	6.2%	4.4%	0.0%
Television programs or movies filmed in Hawai'i	5.2%	7.9%	25.2%	8.6%	10.1%	6.6%
BASE	424	461	8	198	38	49

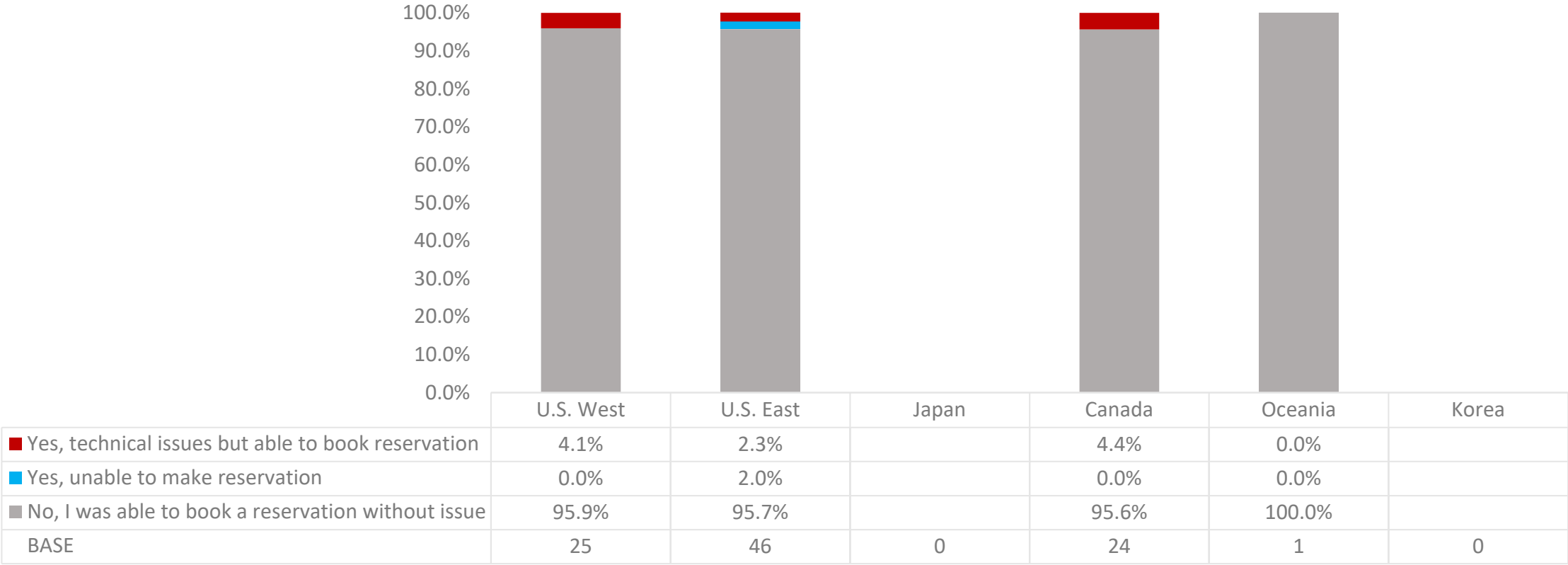
ATTRACTIONS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Alexander & Baldwin Sugar Museum	1.2%	1.3%	0.0%	1.6%	3.4%	5.2%
Aquarium Maui/ Maui Ocean Center	17.6%	15.3%	37.0%	18.5%	13.5%	4.8%
Baldwin Missionary Home Museum	3.8%	3.7%	0.0%	5.8%	5.7%	1.7%
Hale Pa'i Printing House	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Haleakalā National Park	25.4%	43.8%	12.6%	46.1%	28.3%	66.4%
Haleki'i-Pihana Heiau State Monument	1.9%	3.2%	0.0%	2.7%	5.7%	3.1%
Hana Cultural Center	8.3%	11.1%	0.0%	10.6%	12.5%	0.0%
'Iao Valley State Monument	8.3%	14.3%	12.6%	11.0%	3.4%	3.5%
Kepaniwai Park & Heritage Gardens	2.9%	3.8%	12.6%	6.1%	7.9%	3.1%
Kula Botanical Garden	10.2%	7.5%	0.0%	6.6%	5.7%	3.1%
Maui Historical Society Bailey House Museum	1.9%	1.7%	0.0%	0.5%	3.4%	0.0%
Wai'ānapanapa State Park	9.3%	17.6%	0.0%	17.6%	9.1%	0.0%
Whaler's Village Museum	14.2%	15.7%	0.0%	14.5%	19.2%	1.7%
Wo Hing Temple Museum	2.4%	1.3%	0.0%	1.1%	3.4%	0.0%

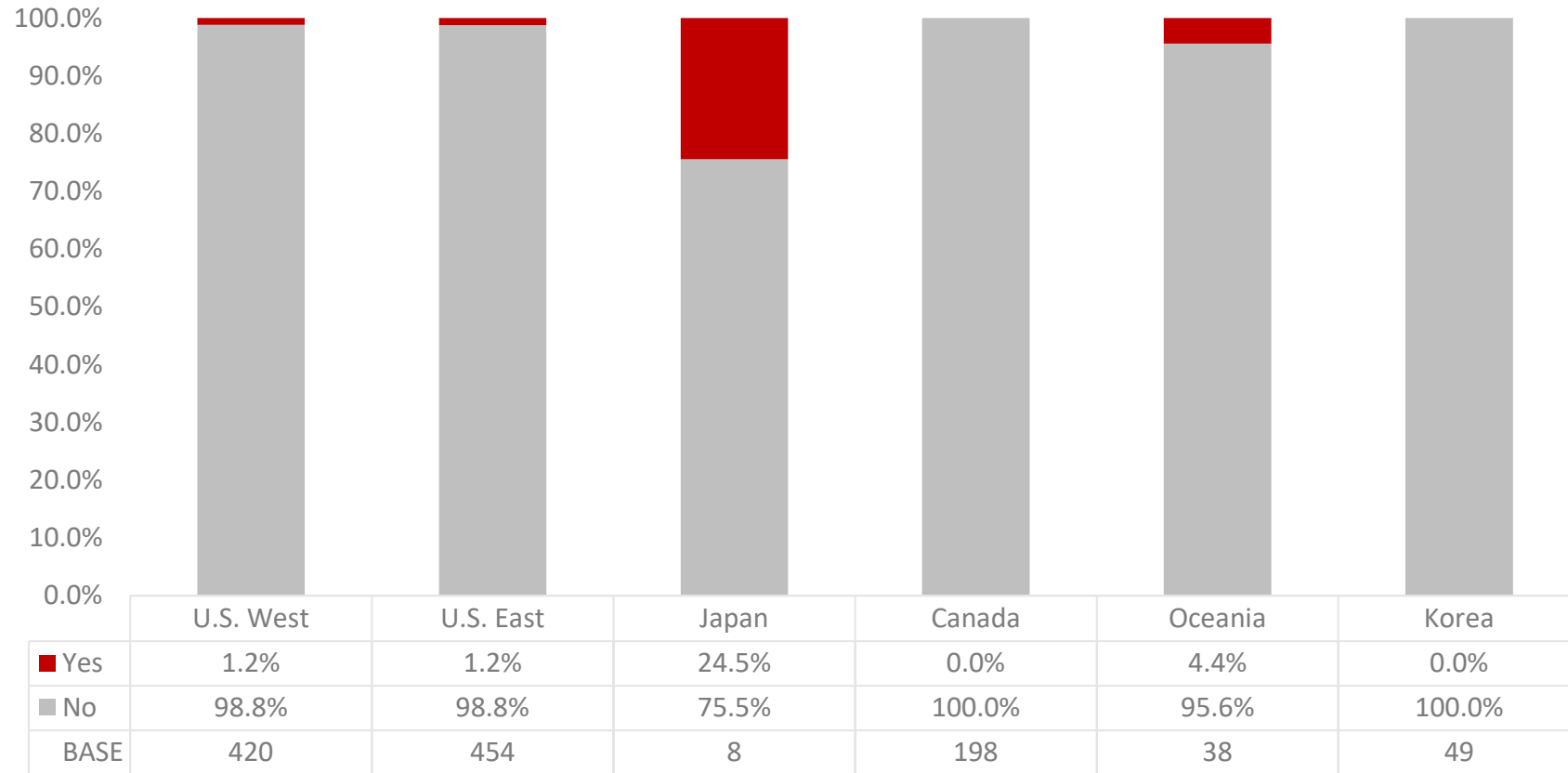
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



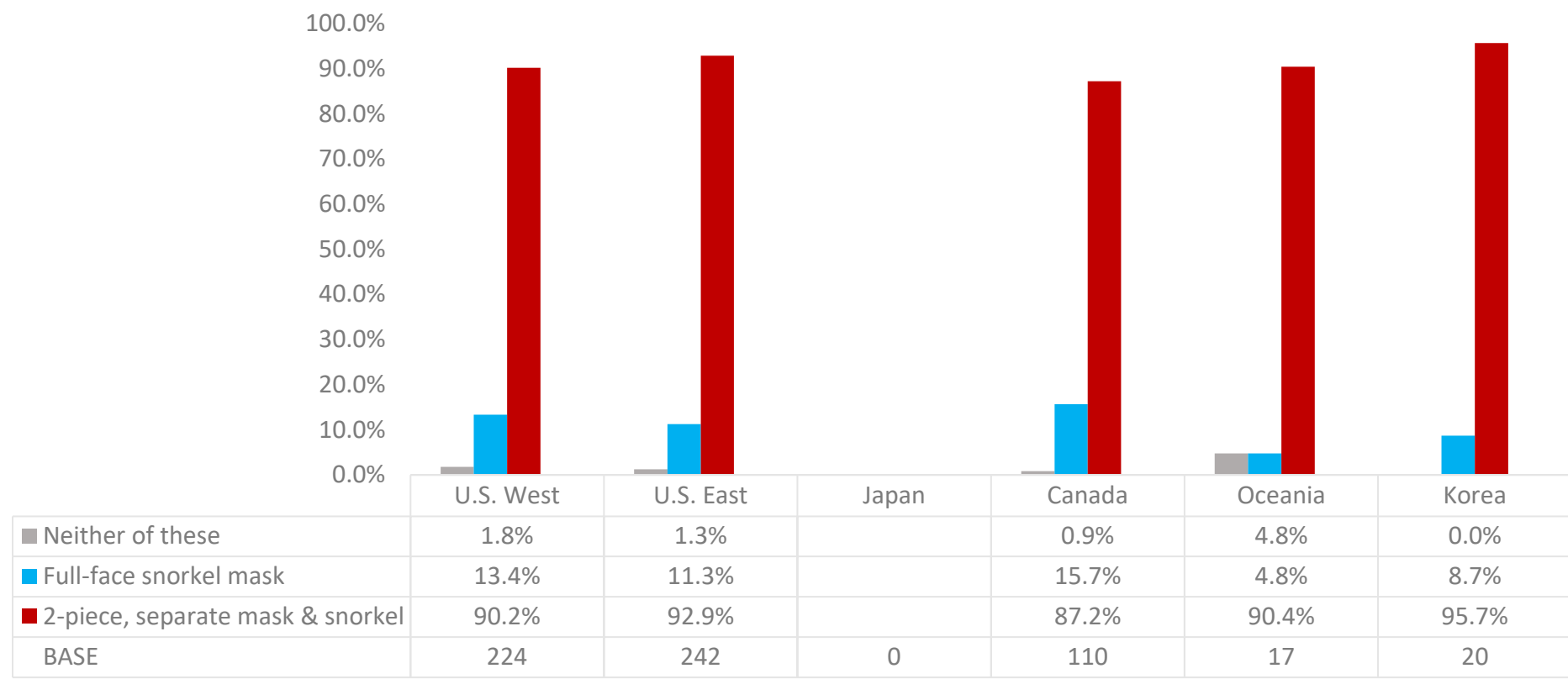
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Other (please specify festival/event name)	40.0%	32.4%	100.0%	0.0%	50.0%	0.0%
Kapalua Food & Wine Festival	40.0%	0.0%	0.0%	0.0%	50.0%	0.0%
Maui Marathon	20.0%	18.9%	0.0%	0.0%	0.0%	0.0%
Hawai'i Food and Wine Festival	0.0%	32.4%	0.0%	0.0%	0.0%	0.0%
Maui Film Festival	0.0%	16.2%	0.0%	0.0%	0.0%	0.0%
BASE	5	6	2	0	2	0

SNORKELING EQUIPMENT USED - MAUI



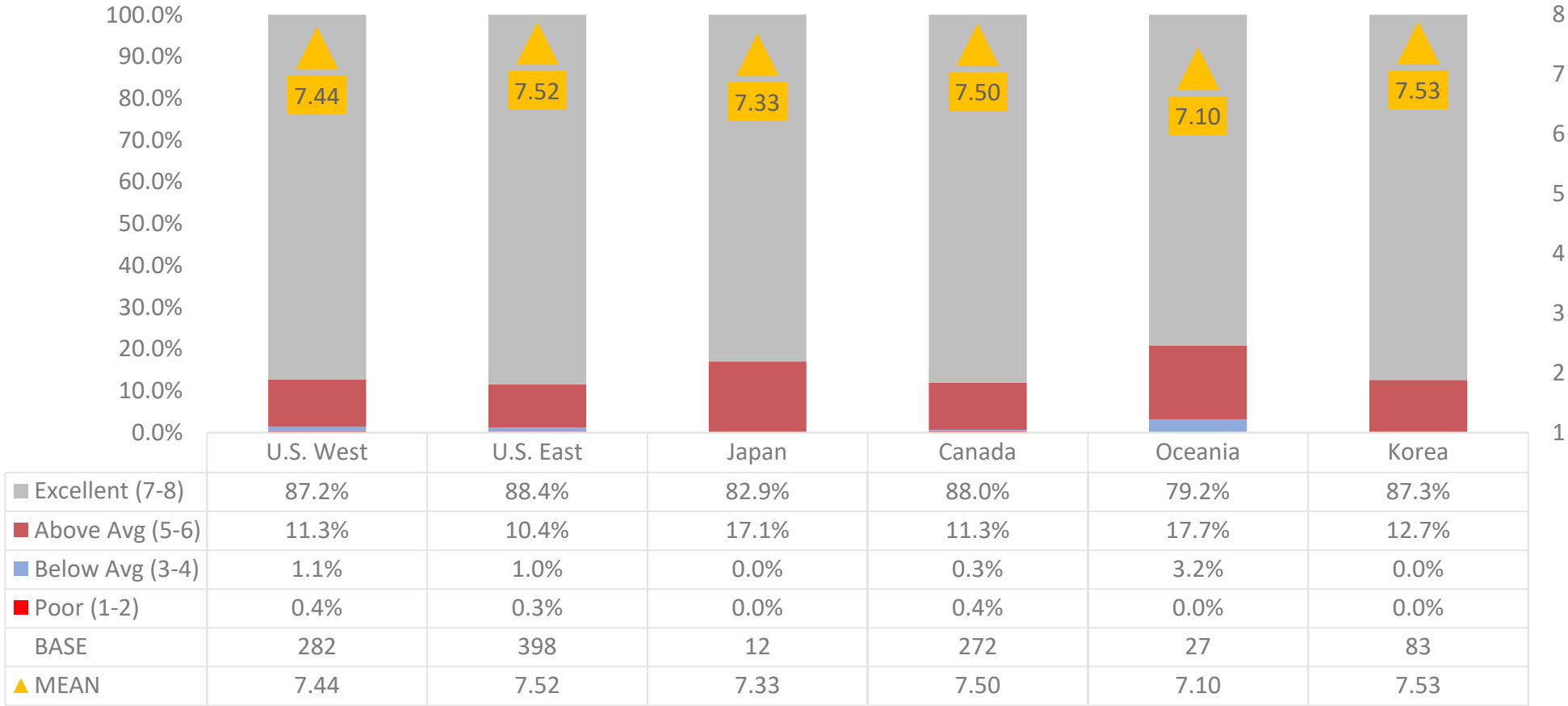
SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	97.3%	98.7%	0.0%	99.1%	100.0%	95.7%
Yes, needed assistance – using 2-piece mask & snorkel	2.7%	0.9%	0.0%	0.9%	0.0%	4.3%
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
BASE	220	239	0	109	16	20

Section 8 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAII

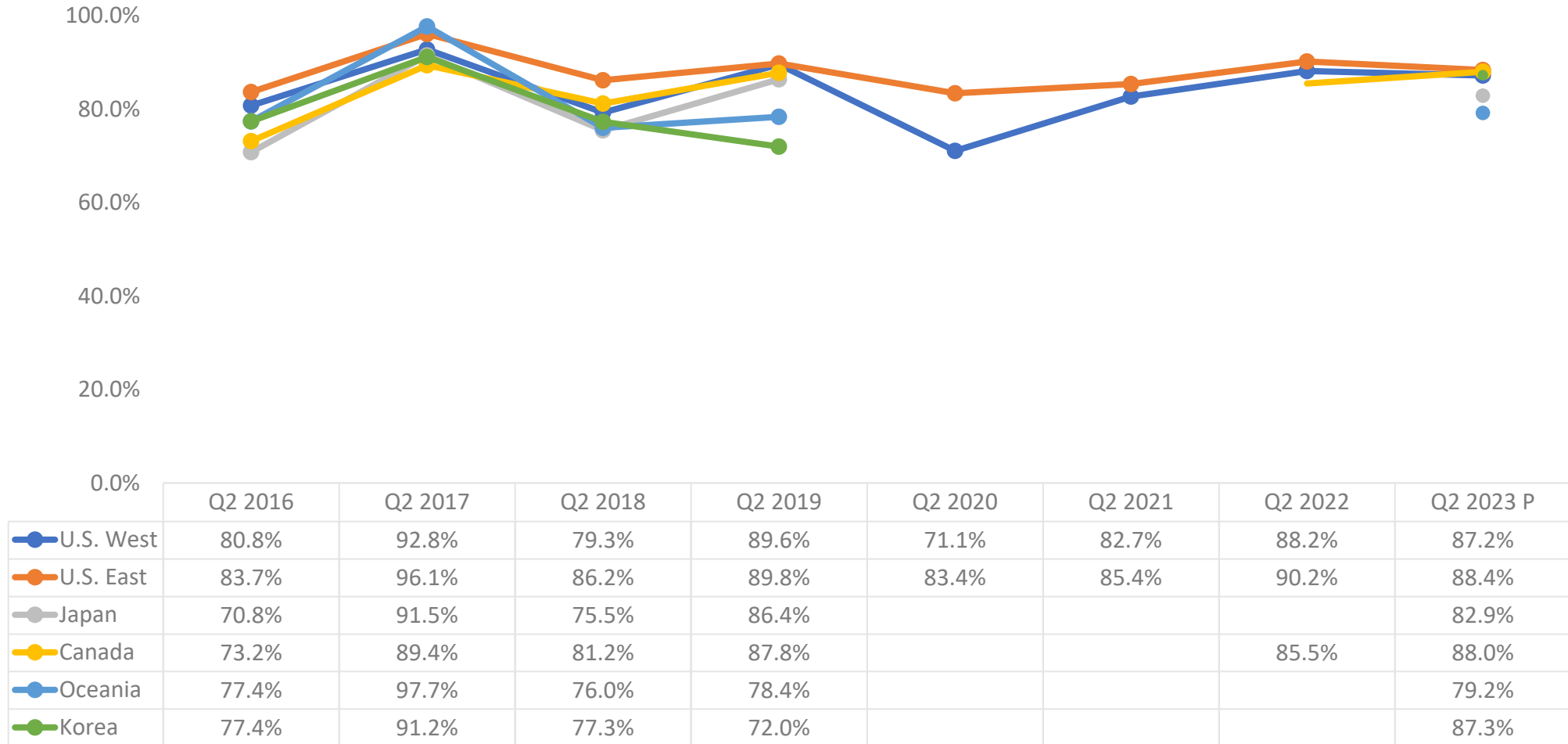
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION - ISLAND OF HAWAI‘I

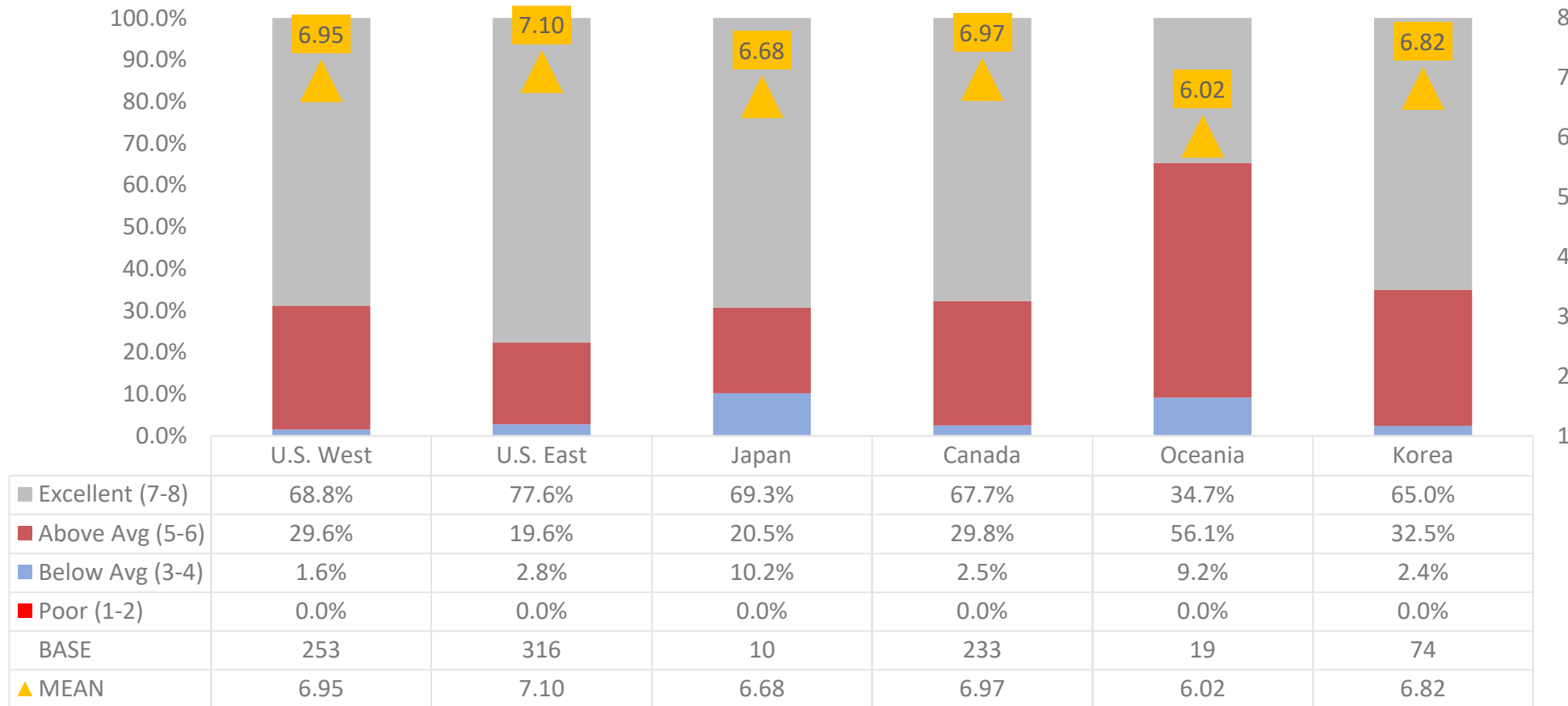
Tracking Data – Rating of “Excellent” (7-8)

100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



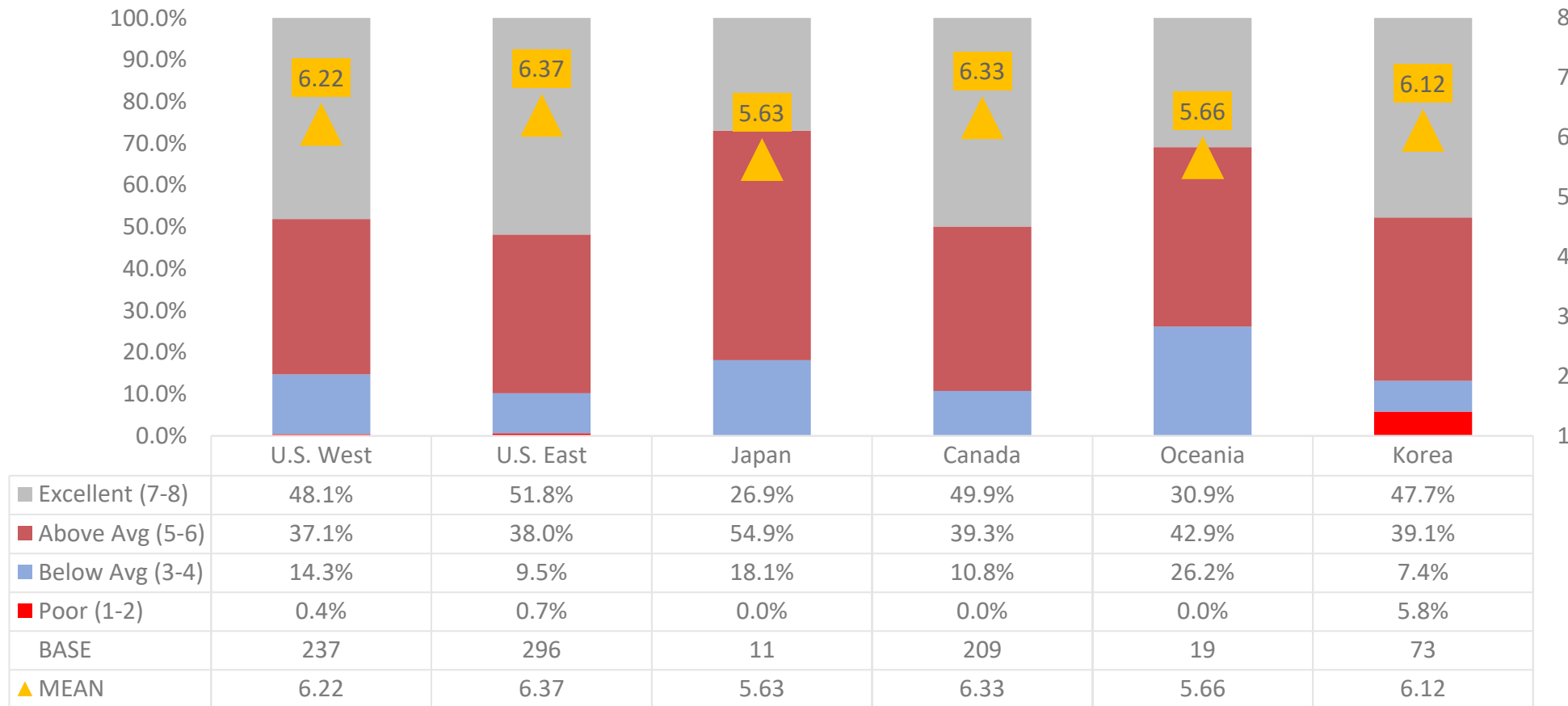
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



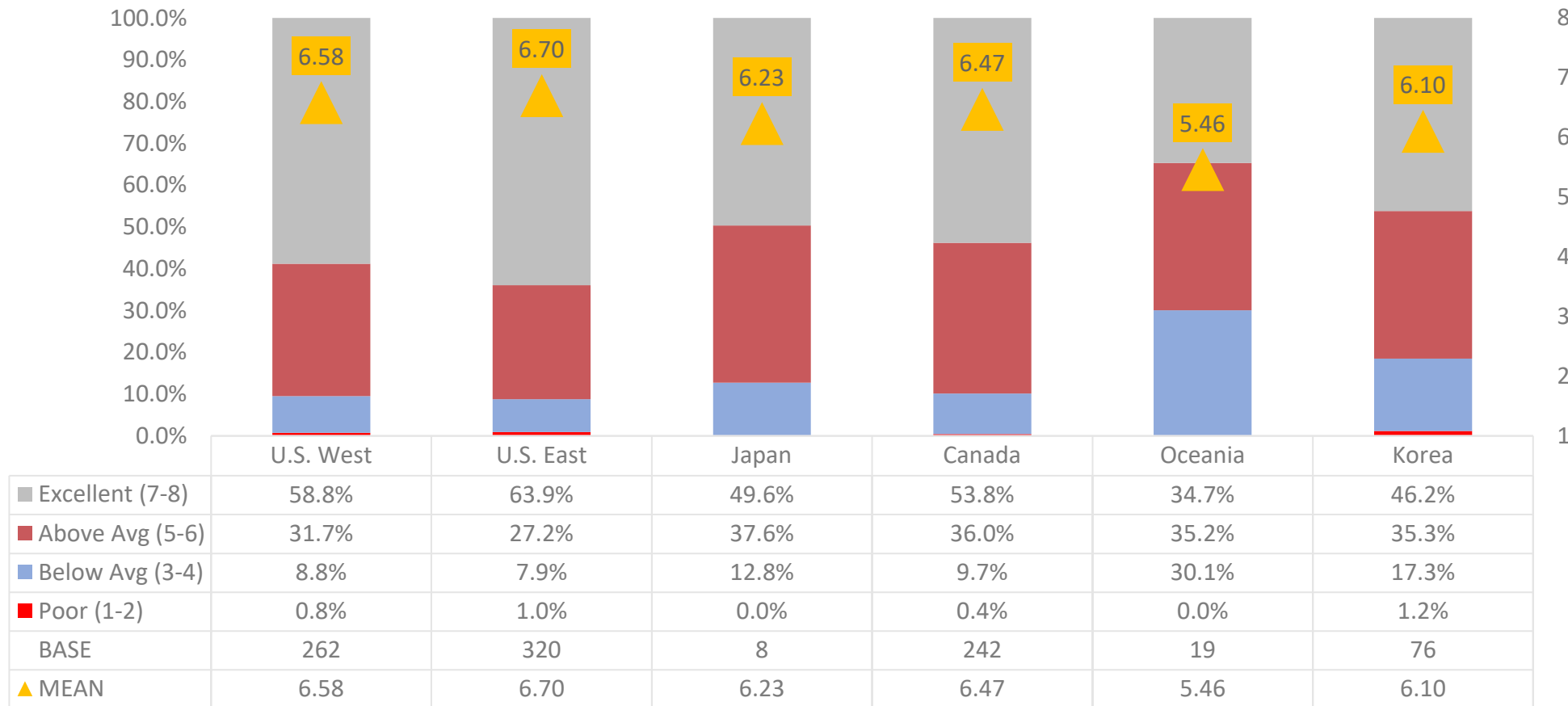
SHOPPING - ISLAND OF HAWAII

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



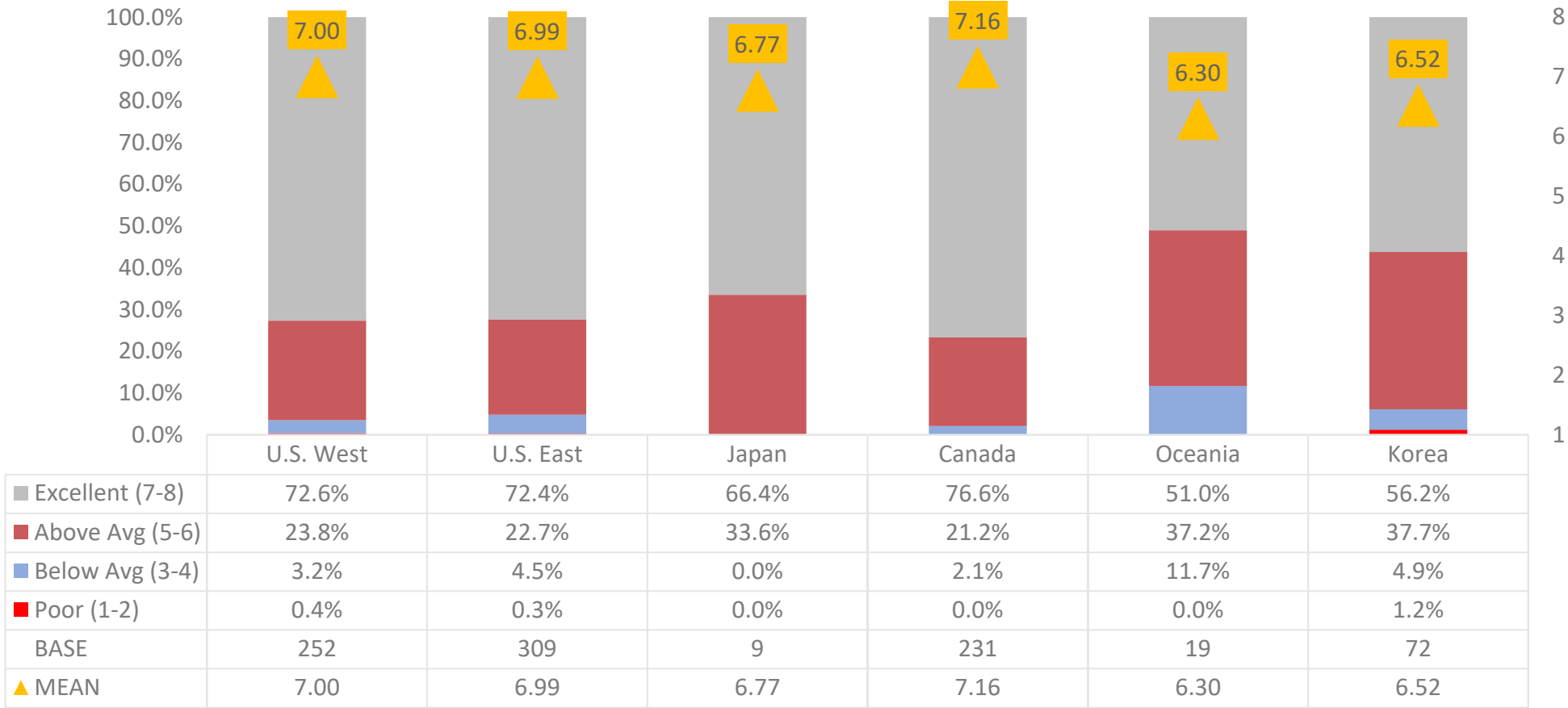
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



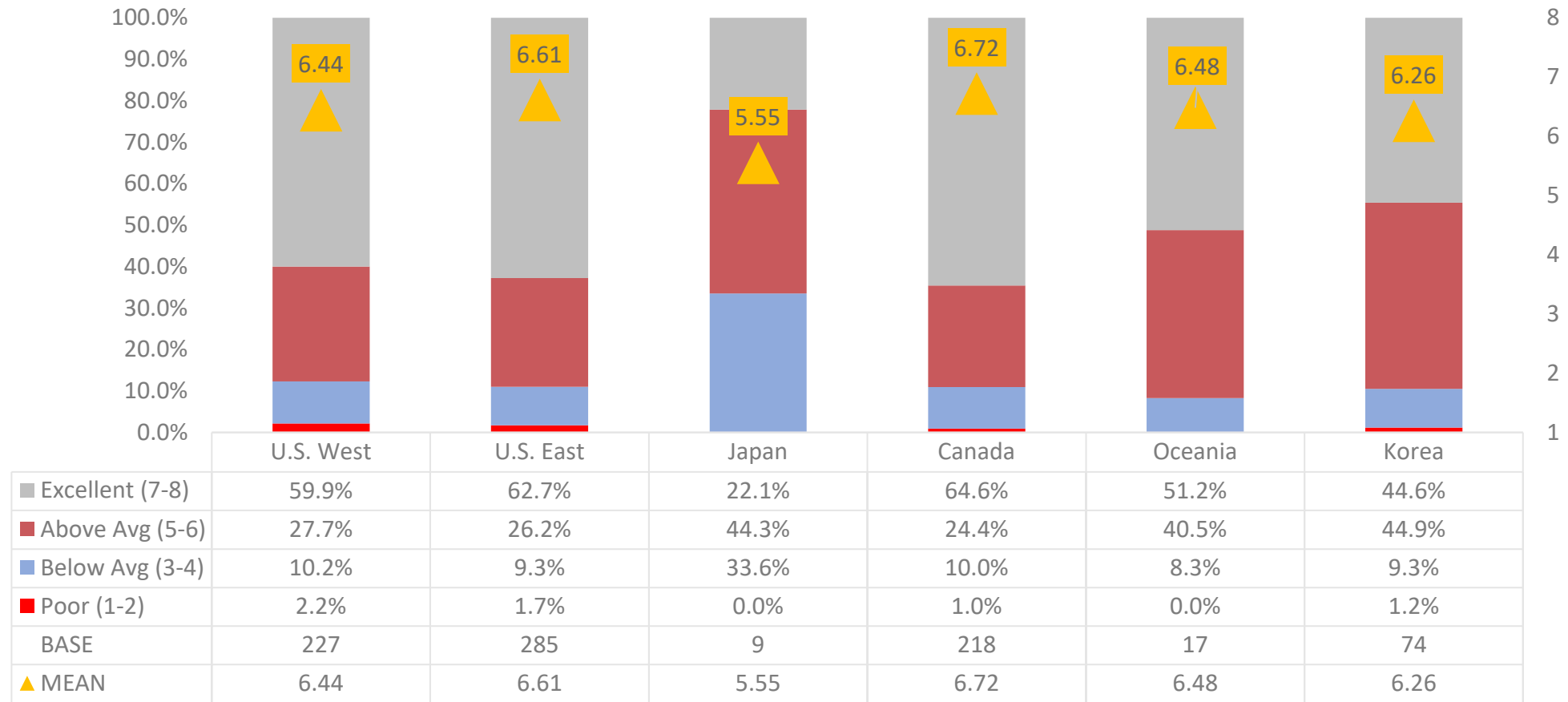
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI‘I

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



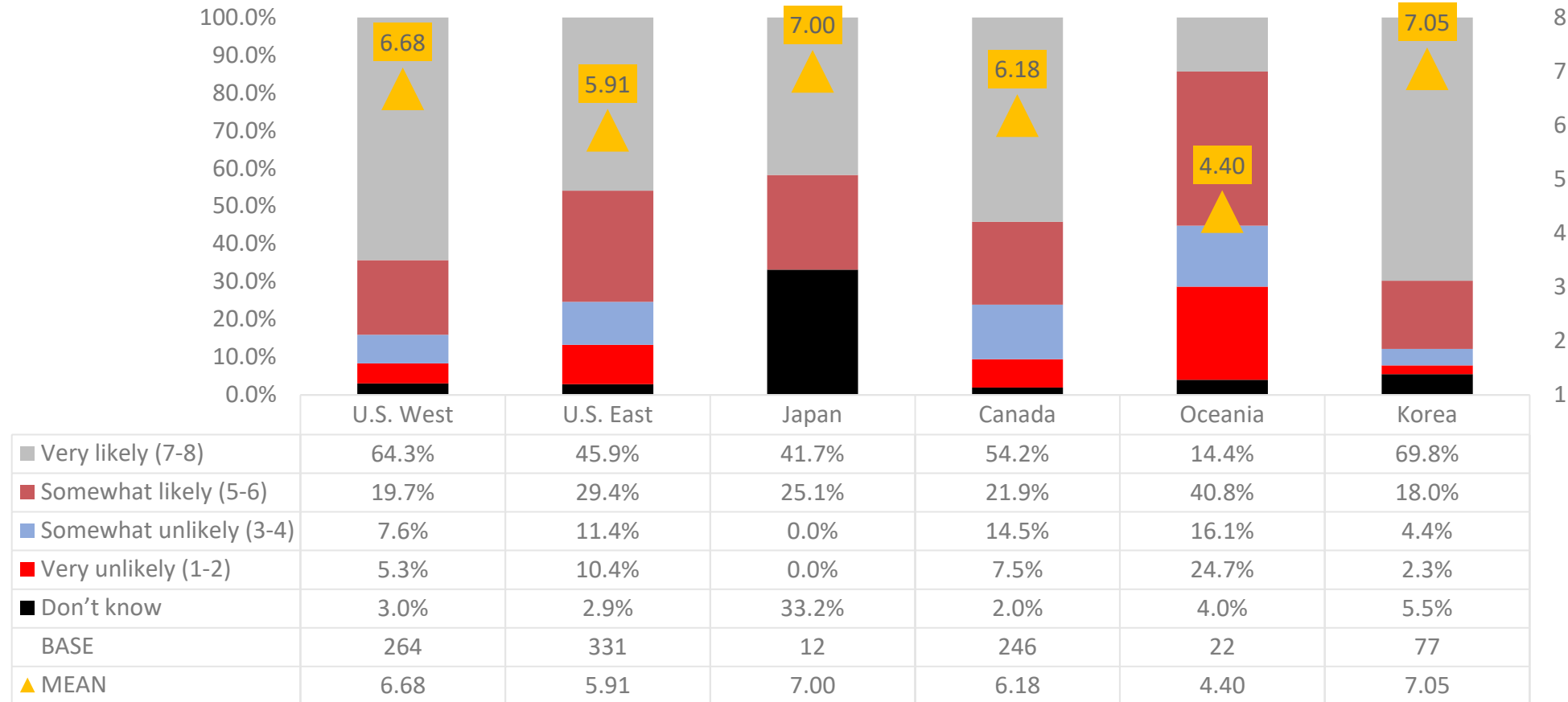
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI‘I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

100.0%

80.0%

60.0%

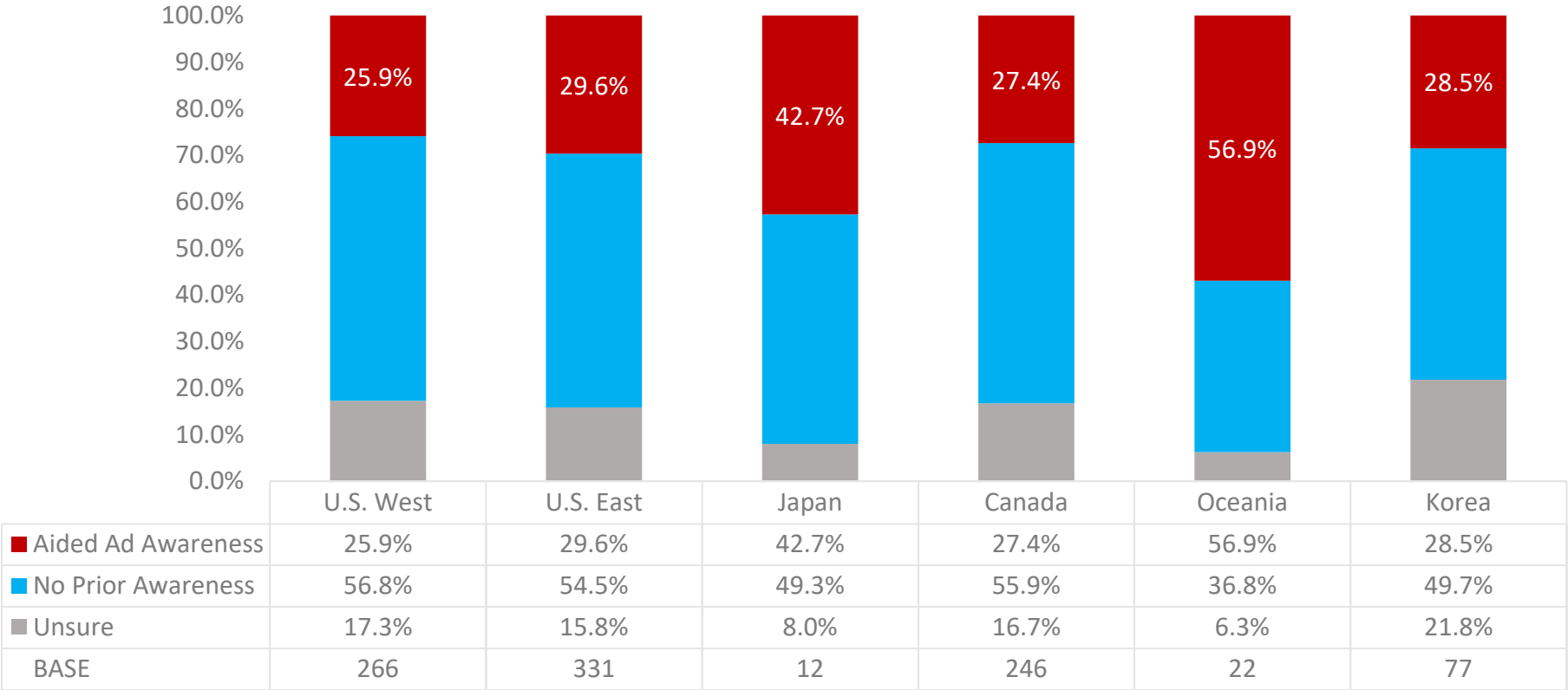
40.0%

20.0%

0.0%

	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023 P
U.S. West	61.8%	68.0%	89.3%	66.3%	63.6%	64.3%
U.S. East	43.5%	49.0%	82.7%	53.8%	48.3%	45.9%
Japan	43.7%	56.3%				41.7%
Canada	51.4%	58.1%			51.0%	54.2%
Oceania	34.6%	43.7%				14.4%
Korea	62.1%	62.7%				69.8%

AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



MOTIVATING FACTORS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	46.3%	62.4%	74.9%	48.0%	63.2%	49.7%
Outdoor or sporting activities and events	20.7%	20.0%	8.0%	17.9%	6.3%	11.3%
Hawaiian cultural events	13.1%	16.8%	0.0%	11.7%	6.3%	4.6%
Hawaiian music	13.9%	7.5%	8.5%	9.4%	6.3%	1.2%
Television programs or movies filmed in Hawai‘i	8.6%	7.7%	16.6%	9.1%	12.6%	14.5%
Social media posts and videos	6.8%	8.0%	16.6%	13.6%	4.0%	27.0%
BASE	266	331	12	246	22	77

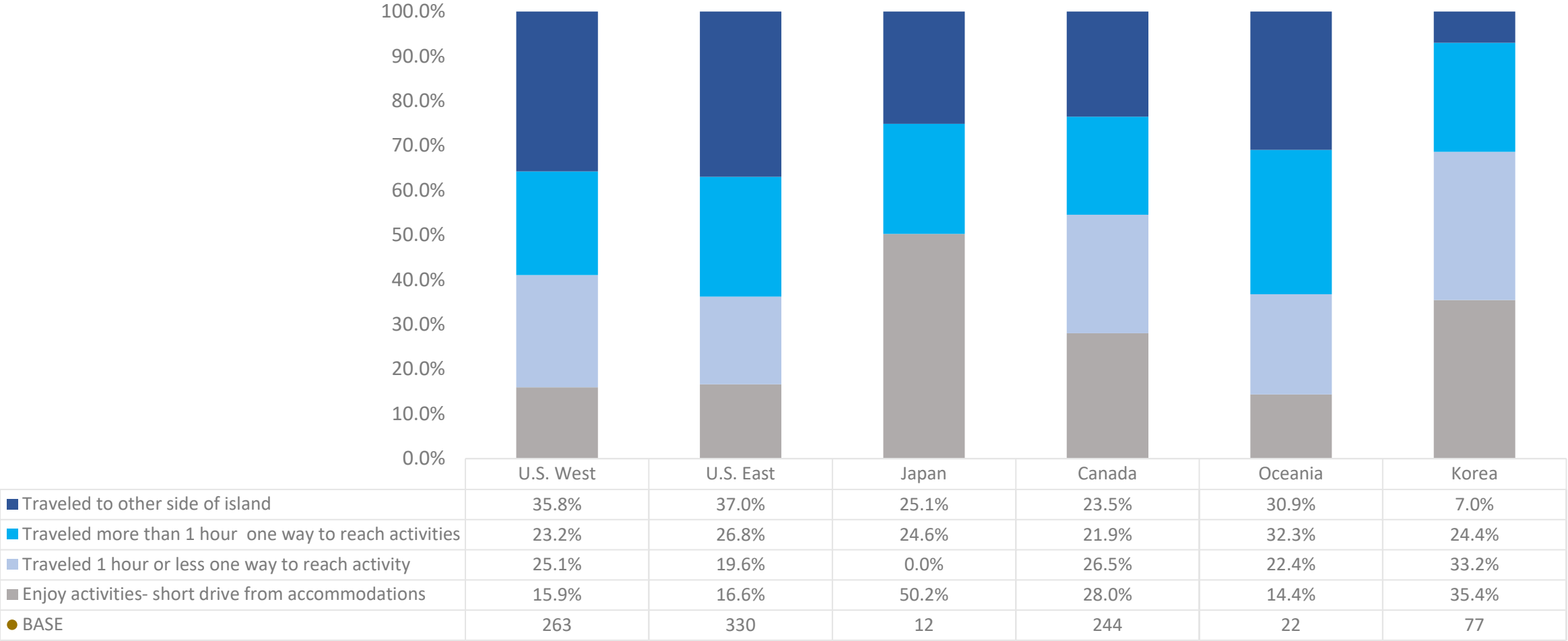
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
‘Akaka Falls	25.1%	35.5%	0.0%	30.2%	8.4%	22.4%
Botanical Gardens	19.8%	22.0%	0.0%	17.6%	15.0%	3.5%
H.N. Greenwell Store	3.0%	3.0%	0.0%	3.3%	0.0%	1.2%
Hawai‘i Volcanoes National Park	53.7%	70.2%	40.7%	49.4%	61.7%	50.3%
Hilo Farmers Market	26.3%	27.3%	25.1%	25.2%	19.2%	9.3%
Hulihe‘e Palace	5.3%	5.7%	0.0%	3.5%	15.0%	4.6%
‘Imiloa Astronomy Ctr	3.4%	2.5%	8.0%	2.8%	8.4%	1.2%
Kaloko-Honokōhau National Historical Park	8.8%	11.7%	0.0%	8.4%	4.2%	2.3%
Kona Coffee Living History Farm	14.5%	16.6%	0.0%	14.6%	10.8%	27.0%
Lili‘uokalani Park and Garden	6.9%	12.7%	16.6%	8.4%	4.2%	5.8%

ATTRACTIONS – ISLAND OF HAWAI‘I

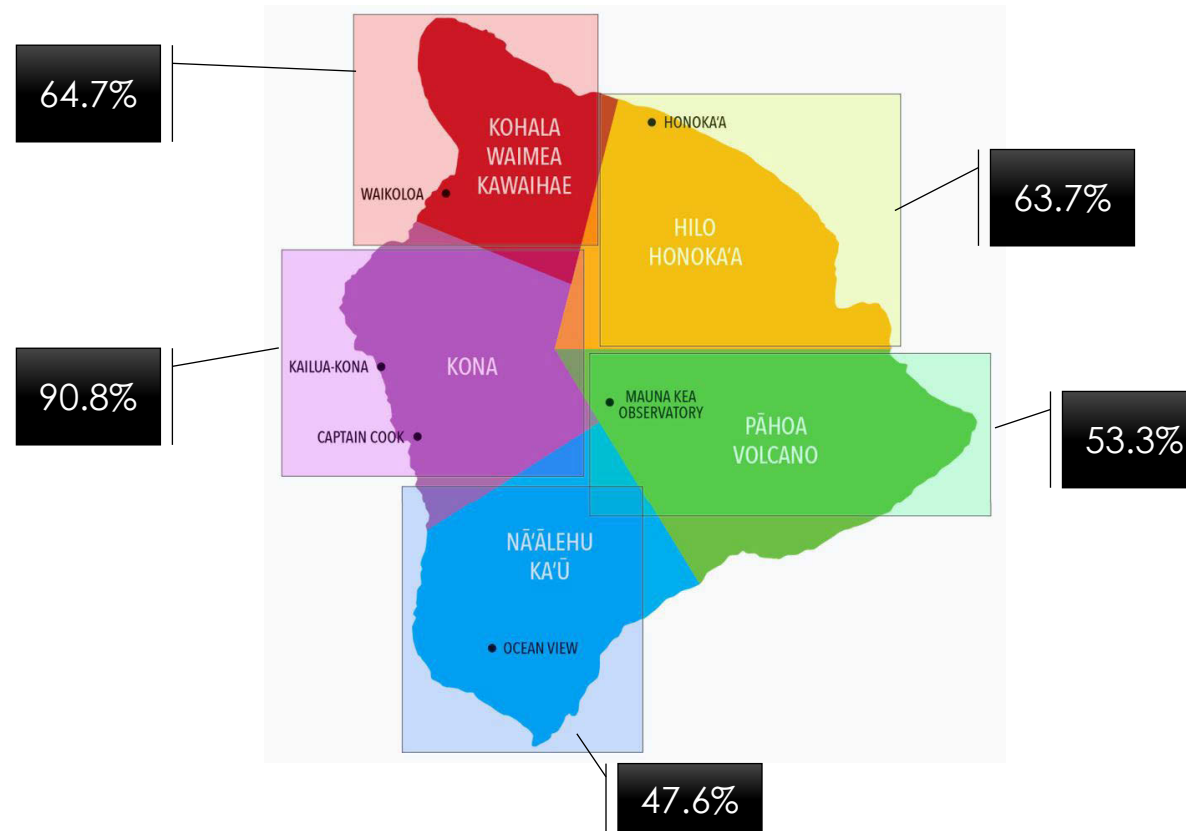
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Lyman House Memorial Museum	1.5%	1.5%	0.0%	2.4%	4.2%	5.5%
Maunakea Visitor Ctr/ Summit	11.1%	17.4%	24.6%	16.9%	10.8%	36.6%
Orchid Farm	1.5%	2.4%	0.0%	1.2%	0.0%	1.2%
Pacific Tsunami Museum	2.6%	3.2%	0.0%	2.0%	4.2%	2.3%
Pana‘ewa Rainforest Zoo & Garden	6.1%	5.9%	0.0%	3.3%	0.0%	1.2%
Pu‘uhonua o Hōnaunau National Historical Park	20.2%	19.1%	0.0%	17.7%	10.8%	4.6%
Pu‘ukoholā Heiau National Historical Site	11.4%	9.5%	0.0%	8.0%	6.5%	1.2%
Punalu‘u Black Sand Beach	33.9%	38.4%	8.5%	31.5%	28.0%	30.0%
Rainbow Falls	28.9%	41.7%	24.6%	28.4%	19.2%	12.5%
Volcano Art Center	11.1%	10.1%	0.0%	7.9%	10.8%	7.0%

TRAVEL ON ISLAND OF HAWAI‘I

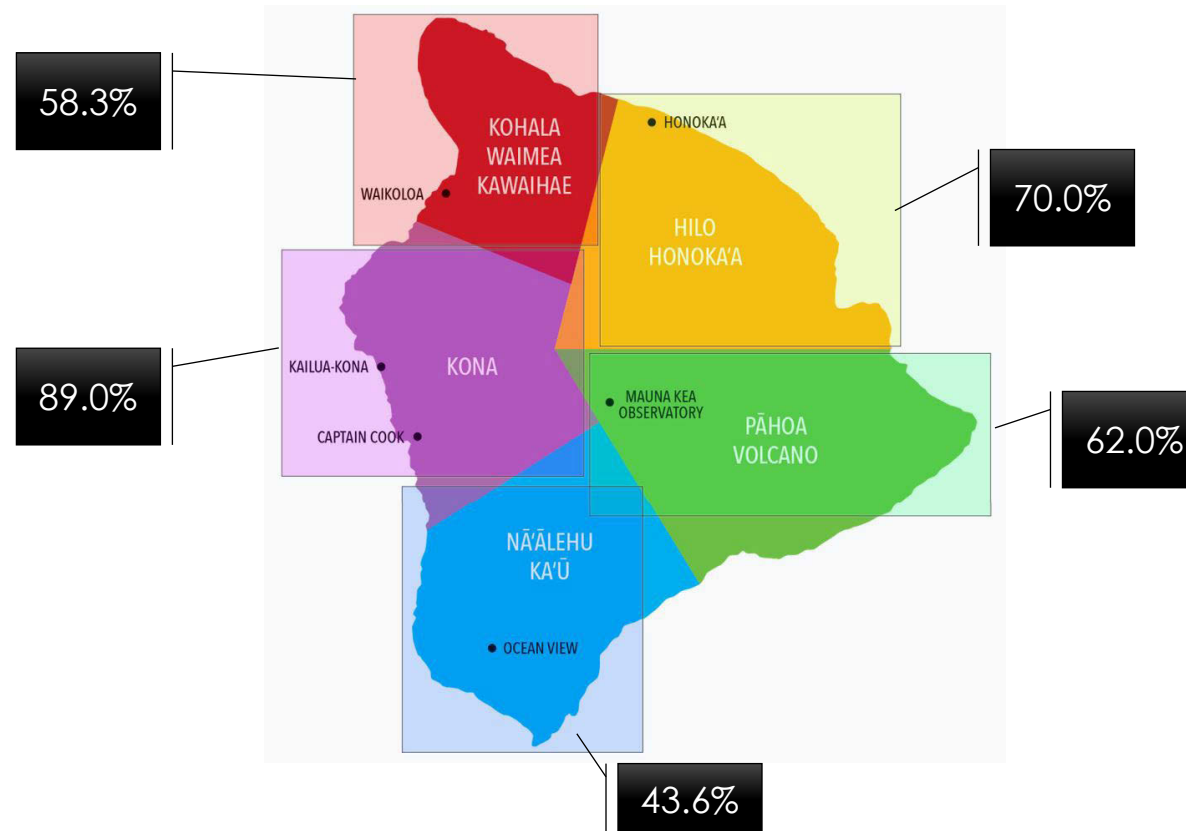


AREAS VISITED ISLAND OF HAWAI'I

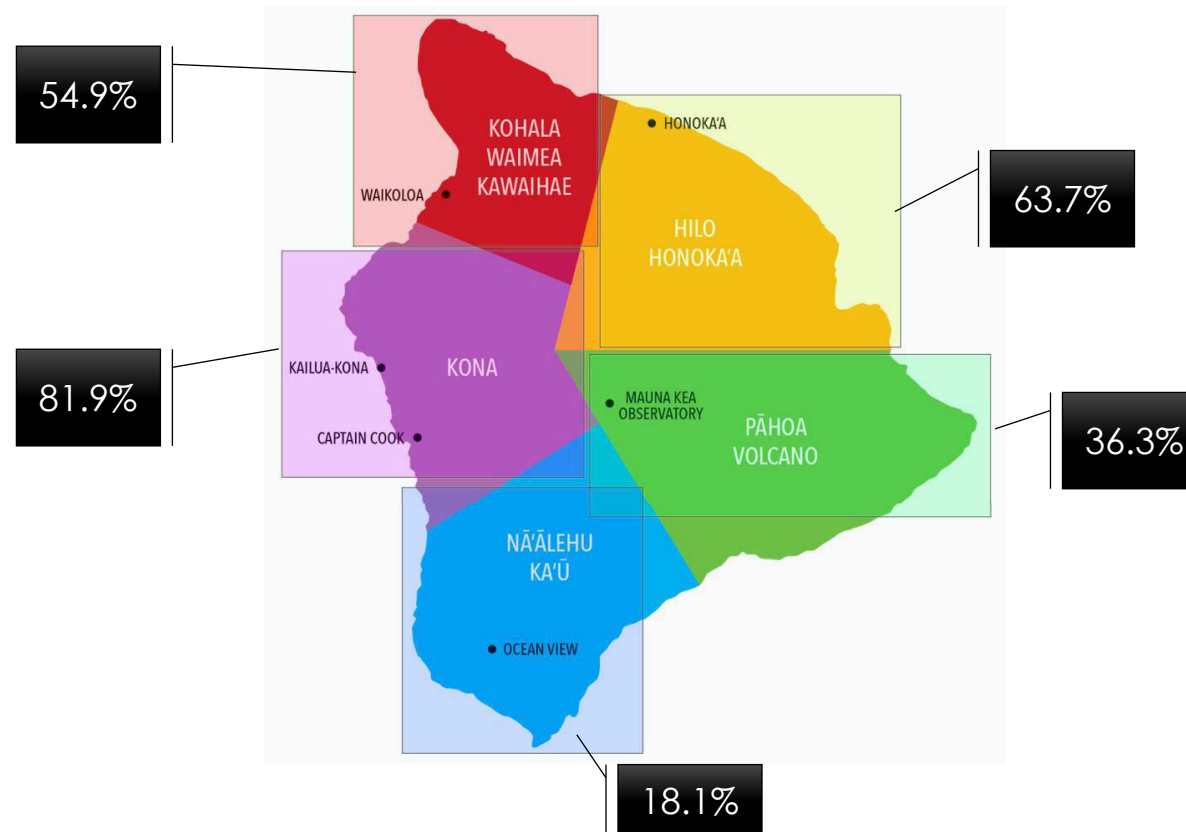
U.S. WEST



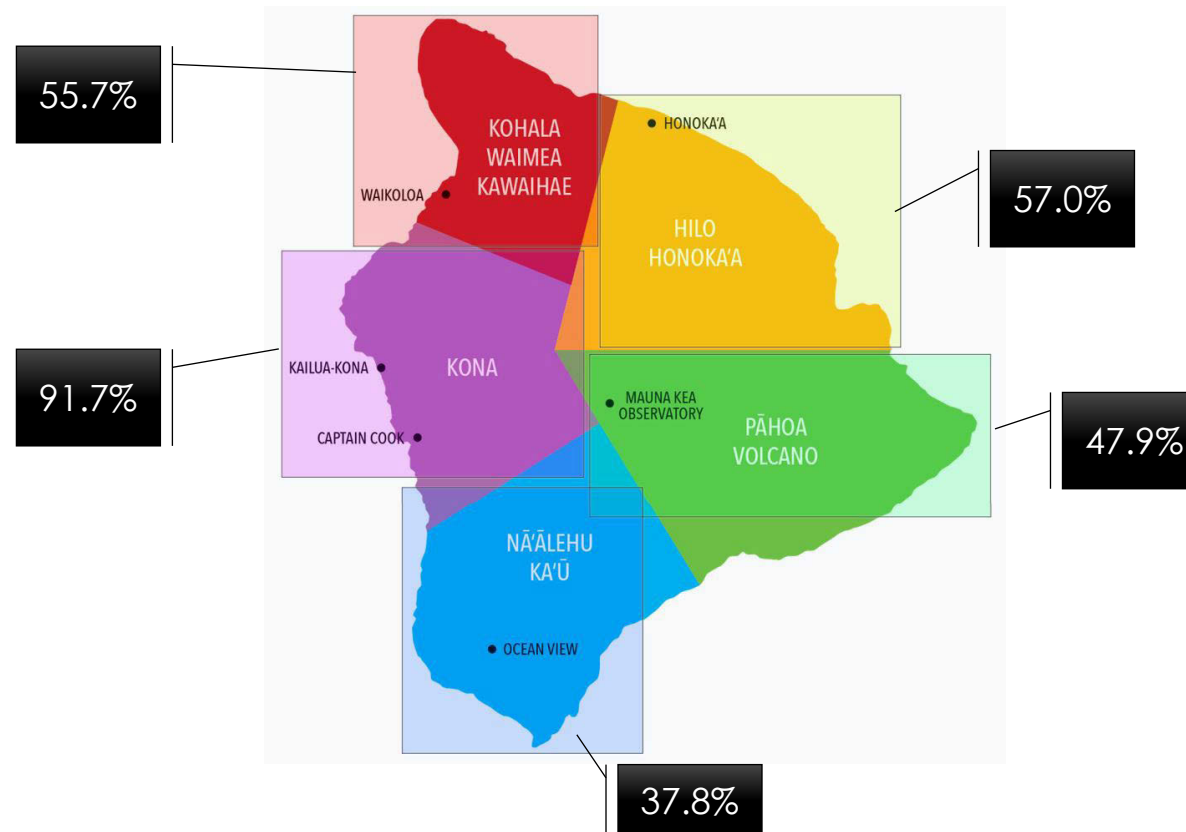
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



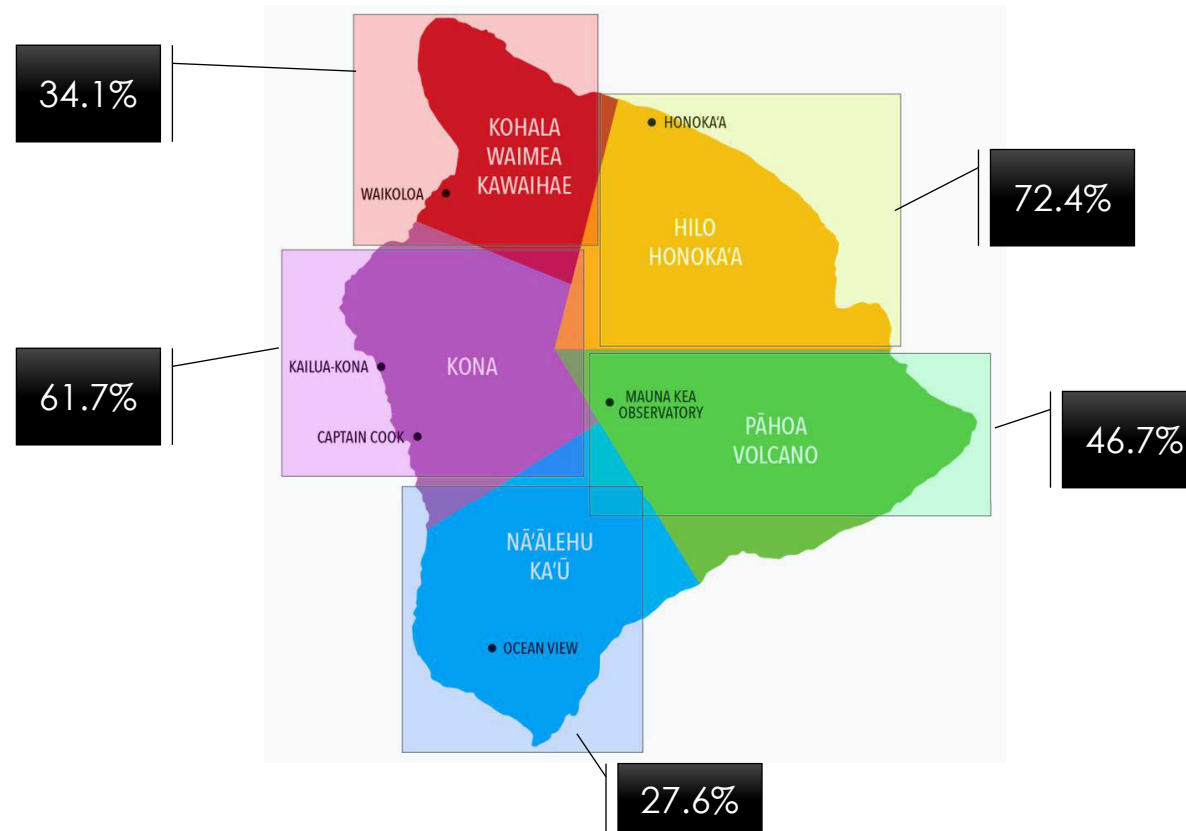
AREAS VISITED ISLAND OF HAWAI'I JAPAN



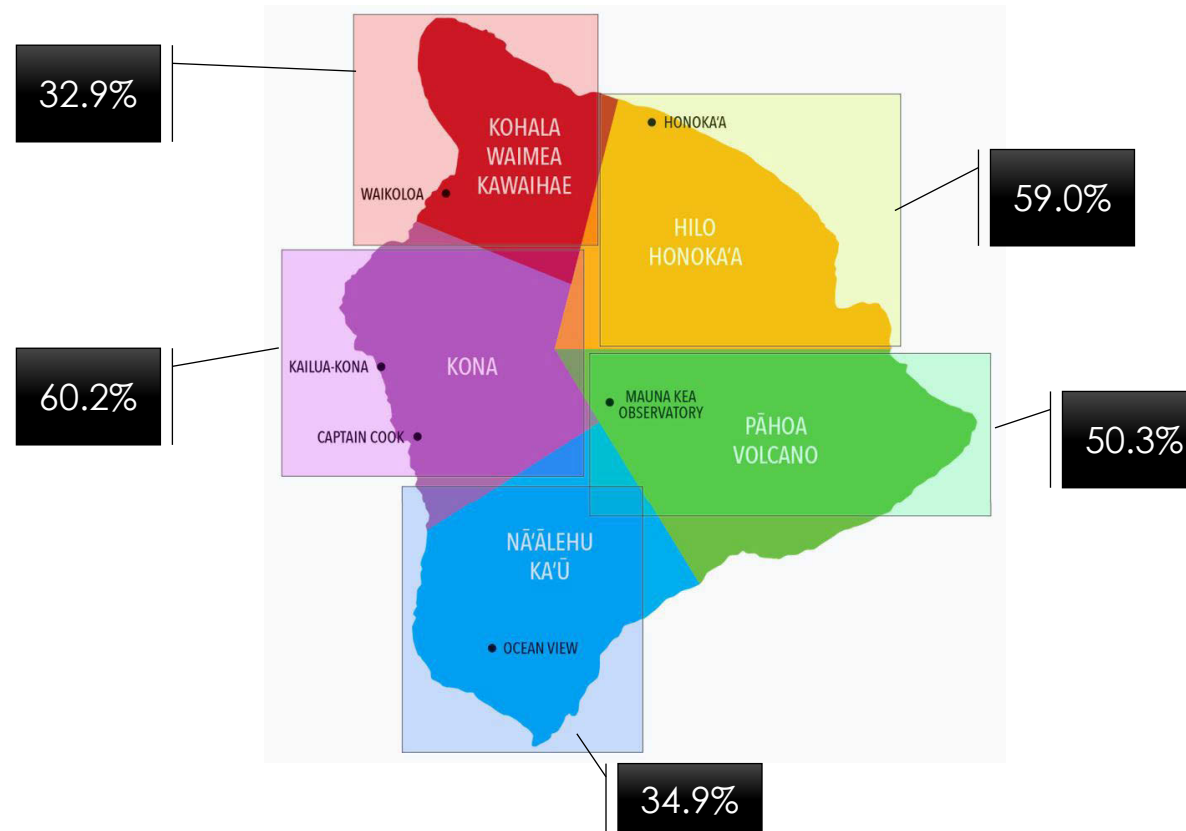
AREAS VISITED ISLAND OF HAWAI'I CANADA



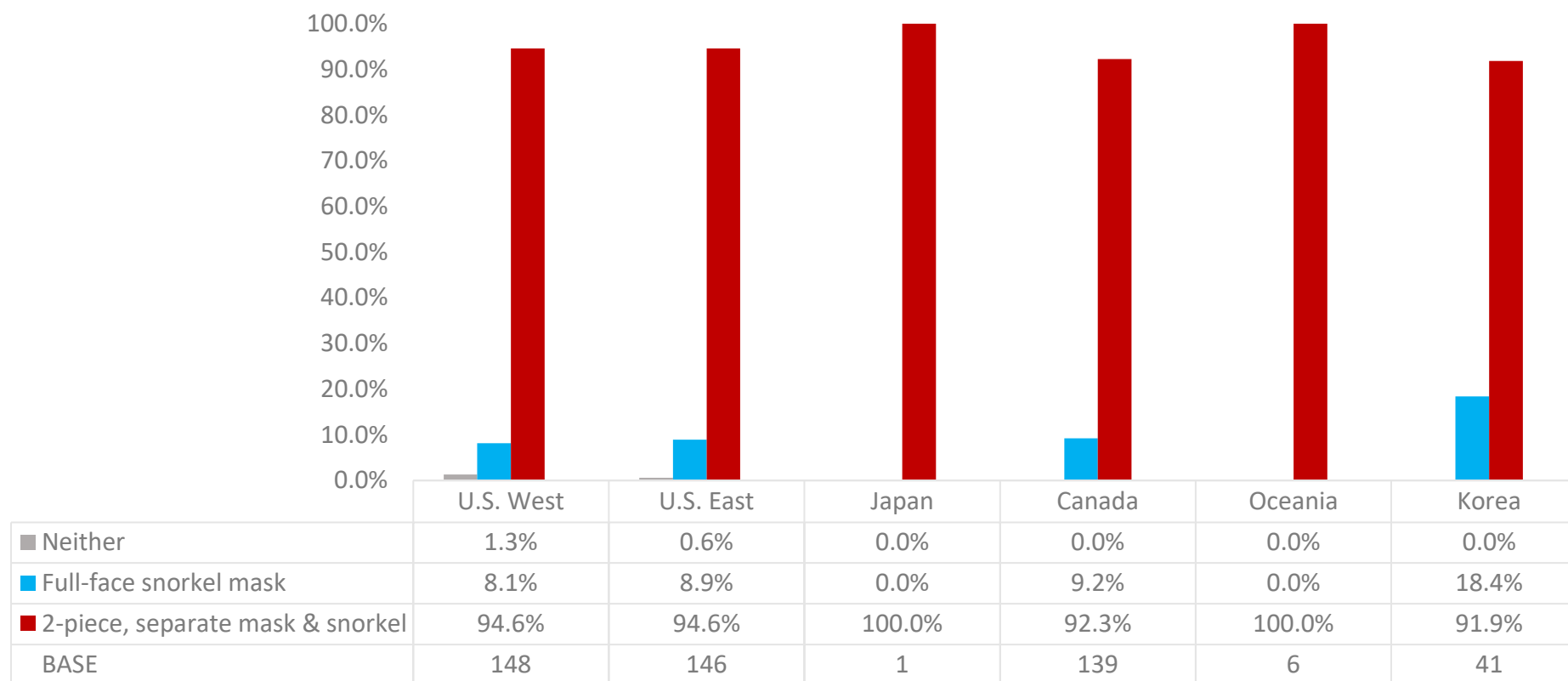
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



AREAS VISITED ISLAND OF HAWAI'I KOREA



SNORKELING EQUIPMENT USED - ISLAND OF HAWAI‘I

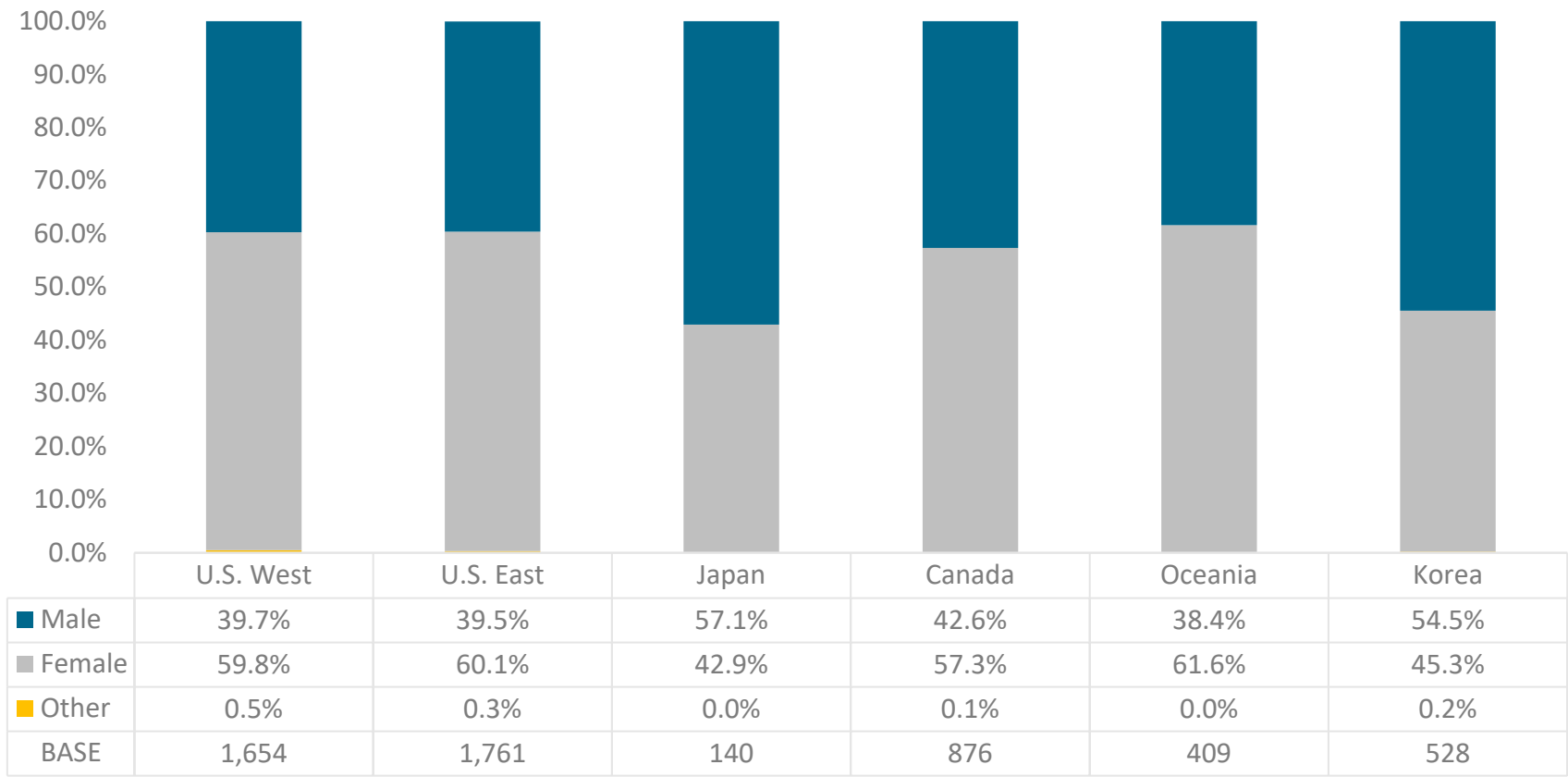


SNORKELING OCEAN SAFETY – ISLAND OF HAWAII

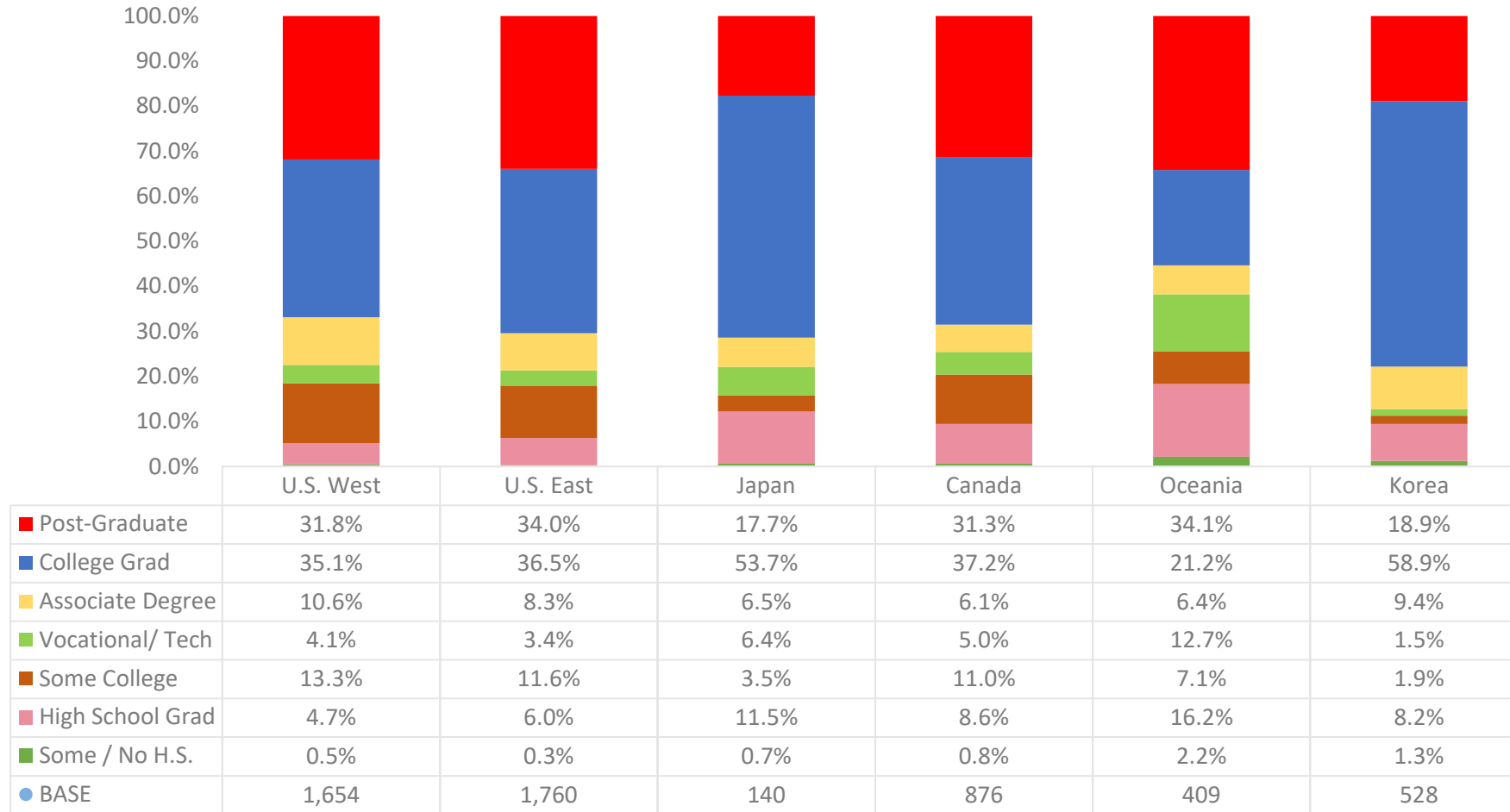
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	100.0%	98.1%	100.0%	97.2%	100.0%	97.8%
Yes, needed assistance – using 2-piece mask & snorkel	0.0%	1.9%	0.0%	2.8%	0.0%	2.2%
Yes, while doing another type of ocean activity	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	146	145	1	139	6	41

Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania
< \$40,000	4.5%	4.8%	5.5%	5.7%
\$40,000 to \$59,999	5.2%	6.9%	8.0%	9.3%
\$60,000 to \$79,999	7.9%	9.4%	12.2%	8.3%
\$80,000 to \$99,999	8.5%	8.3%	11.1%	8.3%
\$100,000 to \$124,999	13.3%	14.1%	10.3%	16.0%
\$125,000 to \$149,999	12.2%	12.0%	13.7%	10.6%
\$150,000 to \$174,999	10.1%	9.7%	8.5%	11.9%
\$175,000 to \$199,999	6.8%	7.4%	8.2%	5.5%
\$200,000 to \$249,999	10.3%	8.8%	9.1%	8.3%
\$250,000 +	21.1%	18.6%	13.5%	16.0%

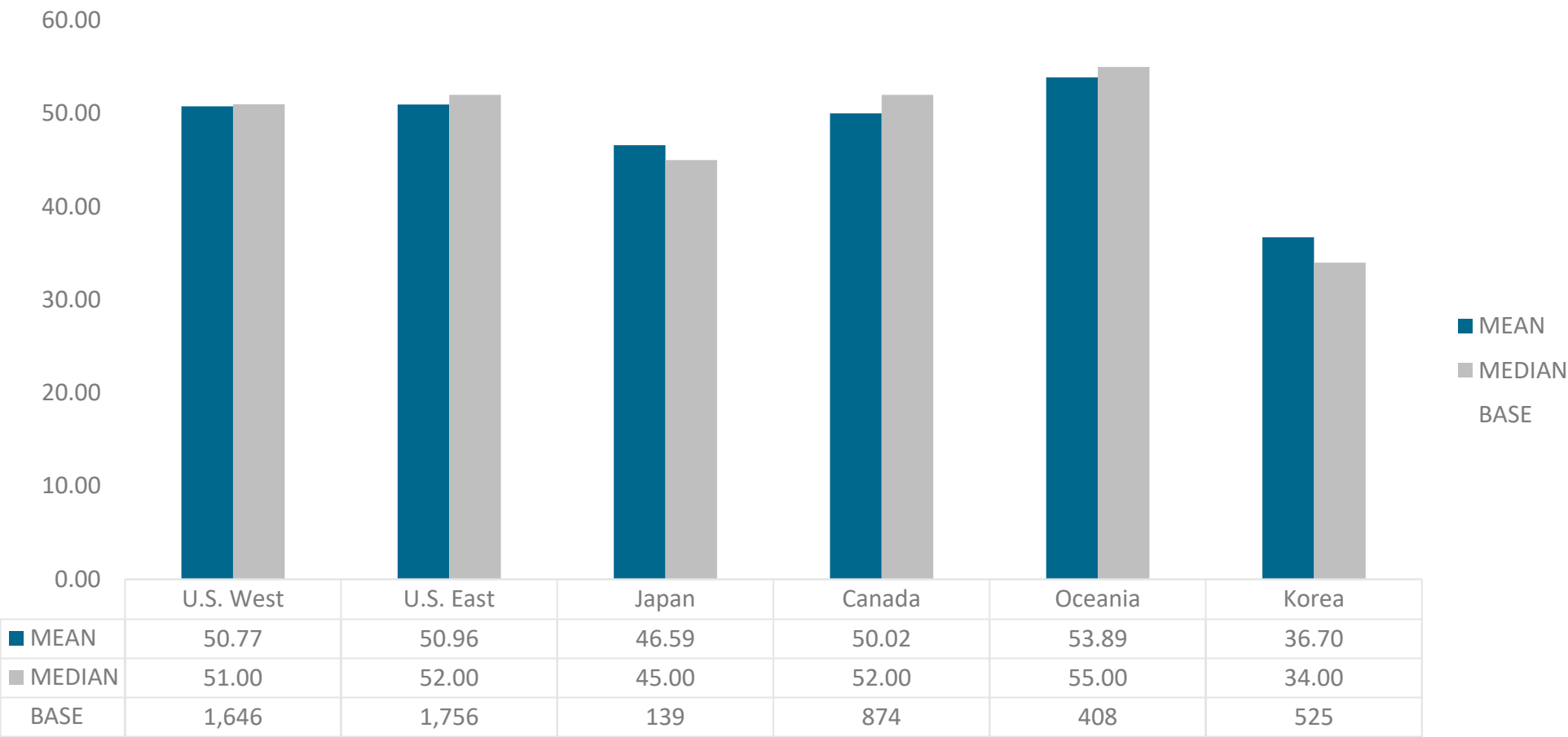
VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	6.0%
¥3.5 - ¥4.5 million	8.4%
¥4.5 - ¥5.5 million	10.7%
¥5.5 - ¥6.5 million	7.6%
¥6.5 - ¥7.5 million	6.2%
¥7.5 - ¥8.5 million	10.8%
¥8.5 - ¥10.0 million	13.0%
¥10.0 - ¥15.0 million	14.7%
¥15.0 - ¥20.0 million	7.0%
¥20.0 million +	15.6%

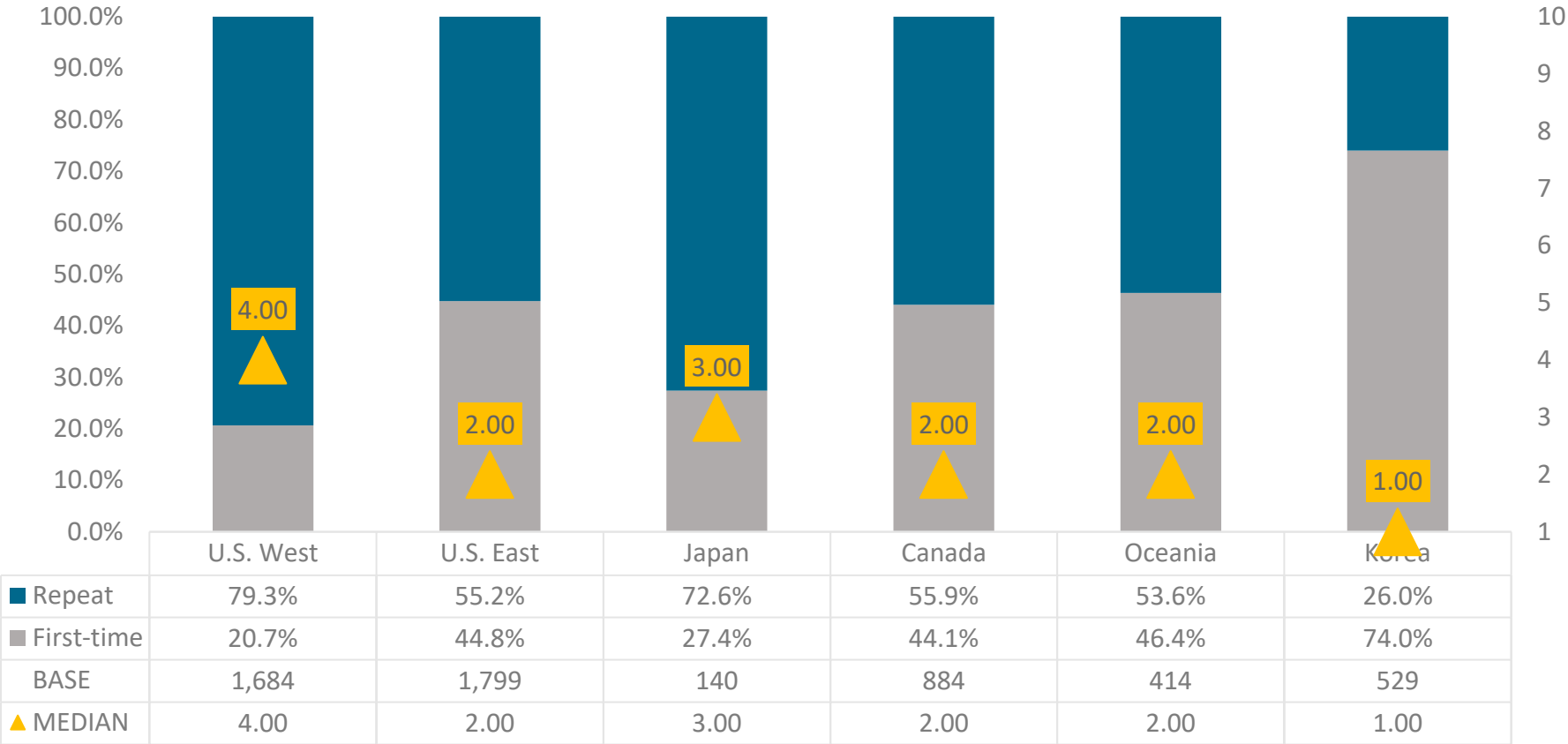
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	7.8%
₩16,305,000-27,173,999	5.0%
₩27,174,000-38,041,999	10.4%
₩38,042,000-48,911,999	12.9%
₩48,912,000-59,781,999	9.0%
₩59,782,000-70,652,999	8.7%
₩70,653,000-81,520,999	8.4%
₩81,521,000-92,390,999	5.1%
₩92,391,000-103,259,999	8.2%
₩103,260,000-149,999,999	12.2%
₩150,000,000-199,999,999	4.9%
₩200,000,000+	7.4%

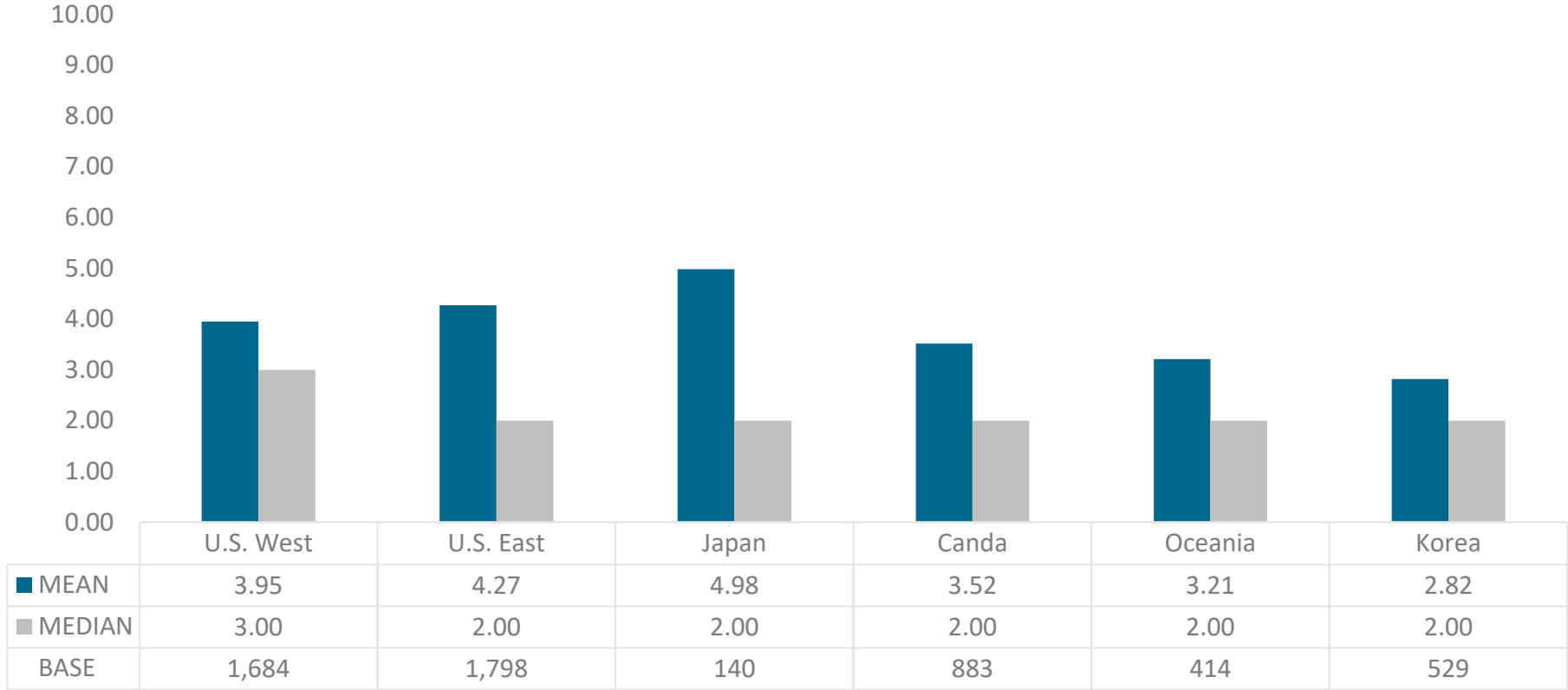
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
My spouse	61.0%	59.3%	50.0%	58.1%	60.4%	75.5%
Other adult members of my family	29.6%	33.0%	14.2%	28.7%	18.5%	14.5%
My child(ren)/ grandchild(ren) under 18	32.1%	24.3%	10.1%	16.9%	22.6%	14.1%
My friends/ associates	15.4%	14.5%	18.6%	16.7%	15.0%	6.6%
Myself only (traveled alone/ no one else)	8.2%	9.2%	21.5%	7.7%	14.0%	5.4%
My girlfriend/ boyfriend	6.3%	5.1%	2.1%	8.1%	2.9%	1.5%
Same gender partner	0.8%	1.1%	0.0%	1.2%	0.7%	0.2%

Section 10 – Island Survey Methodology

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT O‘AHU

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

MMA	Completed	Margin of Error±
U.S. West	791	3.48
U.S. East	1,142	2.90
Japan	129	8.63
Canada	458	4.58
Oceania	393	4.94
Korea	499	4.39
China	30	17.89
All MMAs	3,442	1.67

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 table summarizes the number of surveys completed for the island of Kaua'i.

MMA	Completed	Margin of Error +
U.S. West	346	5.29
U.S. East	340	5.31
Japan	0	
Canada	178	7.35
Oceania	19	22.48
Korea	14	26.19
China	2	69.30
All MMAs	899	3.27

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 table summarizes the number of surveys completed for the island of Maui.

MMA	Completed	Margin of Error +
U.S. West	465	4.54
U.S. East	582	4.06
Japan	9	32.67
Canada	290	5.75
Oceania	46	14.45
Korea	50	13.86
China	1	98.00
All MMAs	1,443	2.58

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 table summarizes the number of surveys completed for the island of Hawai‘i.

MMA	Completed	Margin of Error +
U.S. West	282	5.84
U.S. East	398	4.91
Japan	12	28.29
Canada	272	5.94
Oceania	27	18.86
Korea	83	10.76
China	9	32.67
All MMAs	1,083	2.98