



VISITOR SATISFACTION AND ACTIVITY STUDY

2024 ANNUAL REPORT

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

Survey Methodology

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. The sampled visitor markets in 2024 included: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, China, Korea and Europe. Fielding was done in all four quarters for each market tested.

Visitor Market	Completed	Margin of Error \pm	Response Rate
U.S. West	6,006	1.26	16.8%
U.S. East	6,998	1.17	19.8%
Japan	1,410	2.61	17.0%
Canada	3,586	1.64	24.1%
Oceania	1,527	2.51	19.3%
China	193	7.05	6.0%
Korea	1,040	3.04	7.9%
Europe	2,427	1.99	17.7%
All visitor markets	23,187	0.64	18.5%

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 survey databases. Selected visitors from the U.S., Japan, Canada, Oceania, Korea, China and Europe 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 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 each quarter. Data from all visitor markets were reported as weighted data based on weights generated for 2024 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

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

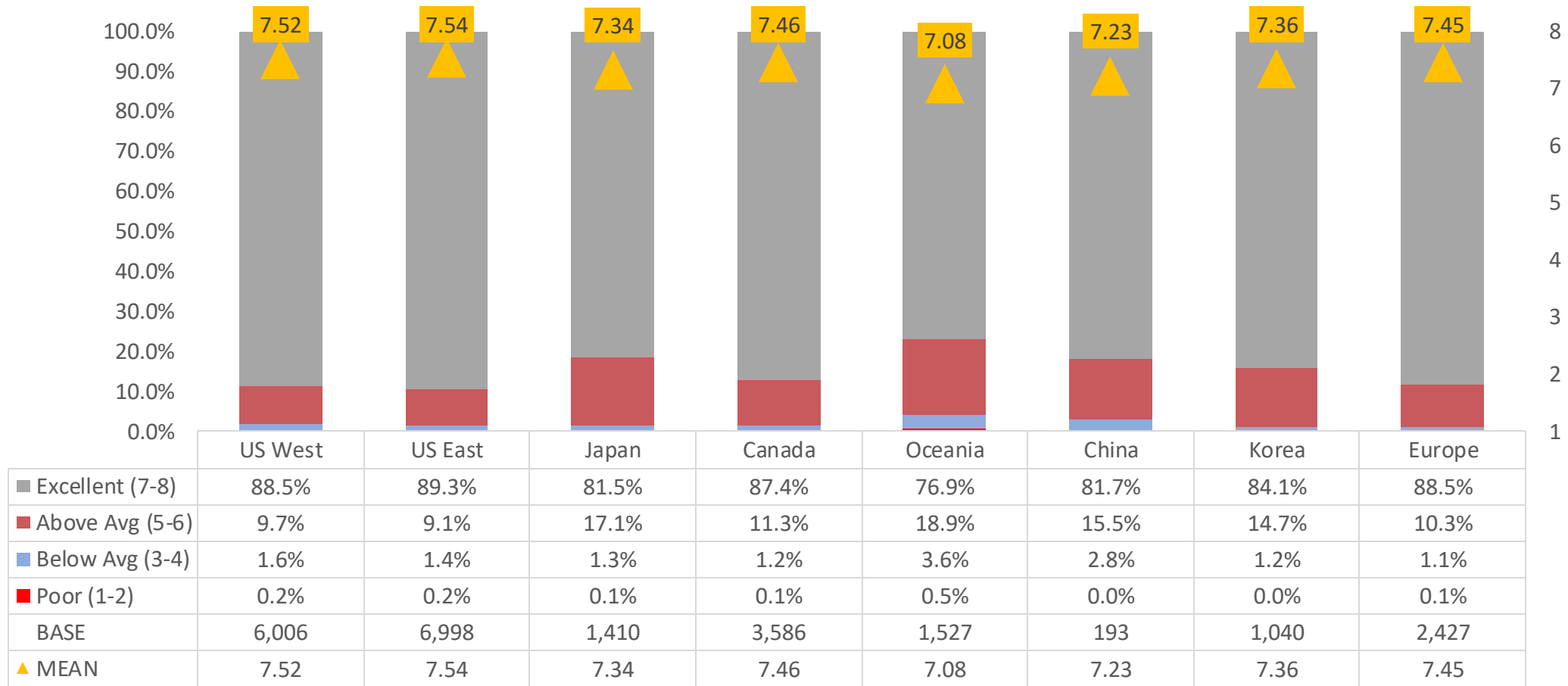
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Section 1 – Visitor Satisfaction

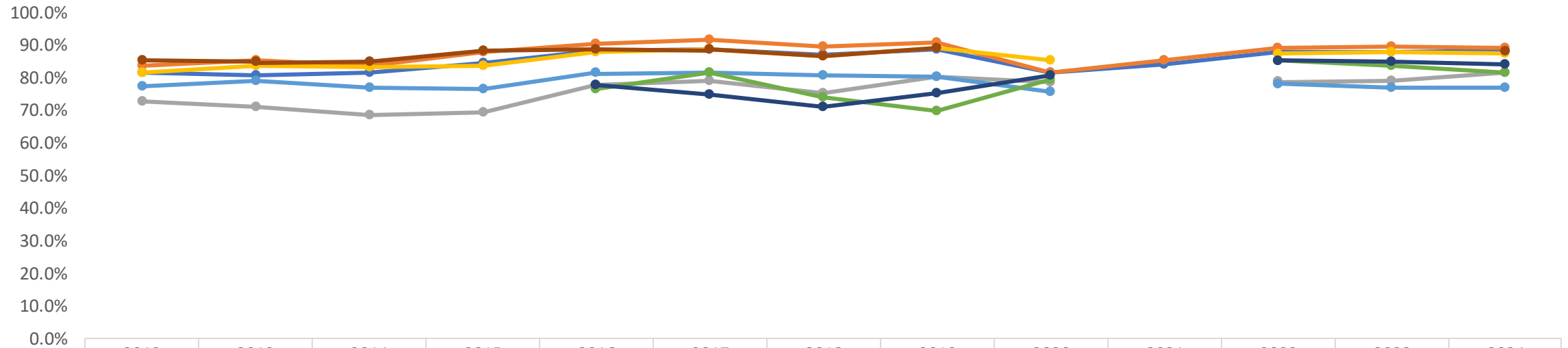
Satisfaction - State of Hawai'i by Visitor Market

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



Satisfaction - State of Hawai'i by Visitor Market

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	81.8%	81.0%	81.6%	84.5%	88.2%	88.9%	87.2%	88.7%	81.7%	84.2%	87.9%	87.9%	88.5%
U.S. East	83.7%	85.6%	83.8%	88.1%	90.3%	91.6%	89.5%	91.1%	81.6%	85.4%	89.4%	89.7%	89.3%
Japan	73.0%	71.0%	68.8%	69.6%	77.9%	79.3%	75.3%	80.4%	78.5%		79.0%	79.3%	81.5%
Canada	81.7%	83.9%	83.2%	83.6%	88.0%	88.6%	86.7%	89.3%	85.4%		87.4%	88.1%	87.4%
Oceania	77.3%	79.0%	76.9%	76.8%	81.6%	81.8%	80.7%	80.4%	75.6%		78.4%	76.9%	76.9%
China					76.5%	81.8%	73.9%	69.8%	79.5%		85.3%	83.9%	81.7%
Korea					77.7%	74.9%	71.0%	75.5%	80.7%		85.4%	84.9%	84.1%
Europe	85.6%	84.9%	85.2%	88.2%	88.7%	88.6%	86.7%	89.3%					88.5%

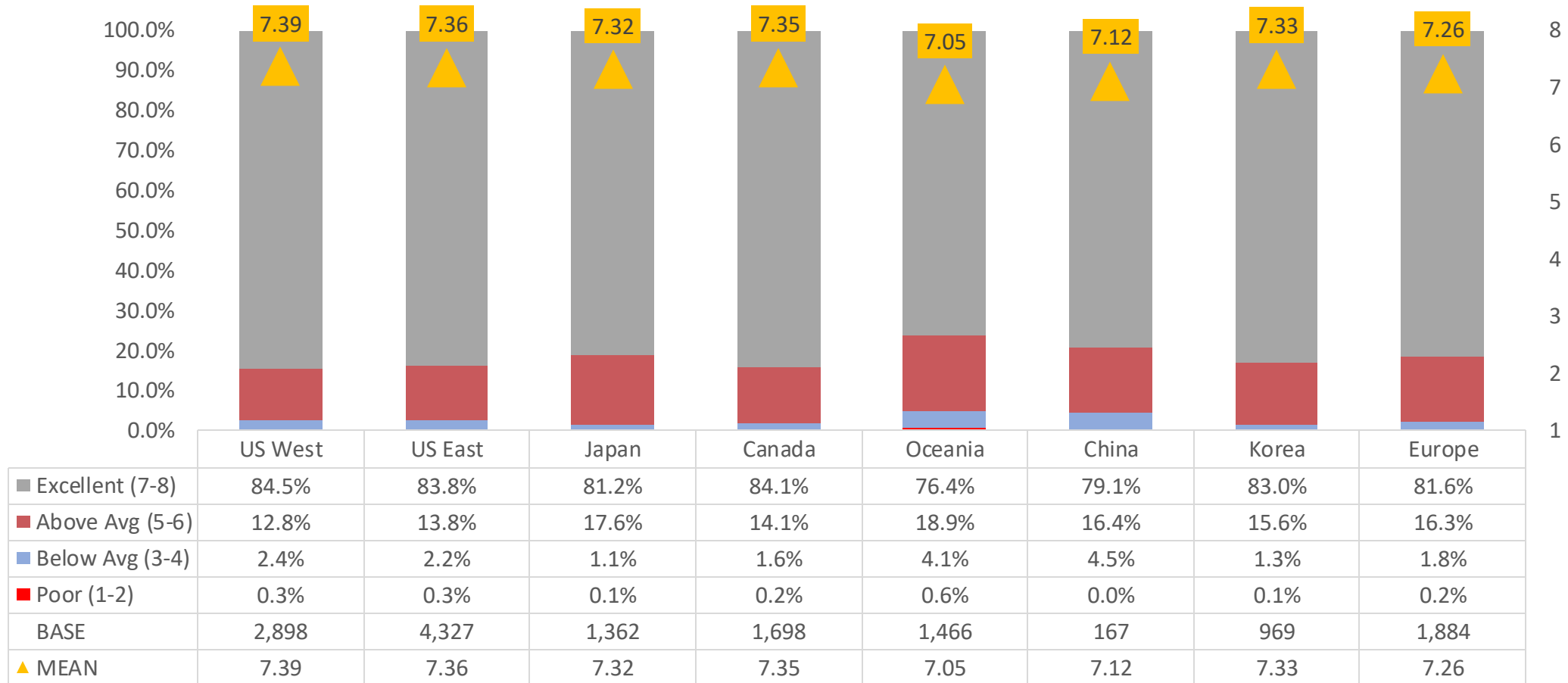
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

Satisfaction - State of Hawai'i by Visitor Market

- ***Trips to Hawai'i:*** First-time visitors from **Japan** were more satisfied with their stay compared to repeat visitors from this market.
- ***Age:*** Satisfaction was highest among younger respondents (<35 years old) among visitors from **U.S. West** and **Japan**.
- ***Gender:*** Female visitors from **U.S. West** and **U.S. East** were more satisfied compared to their male counterparts when rating their stay in Hawai'i.
- ***Household income:*** Less affluent (<\$100K) visitors from **U.S. West** gave higher satisfaction mean scores for their most recent trip compared to more affluent visitors (\$100K+) from this market.
- ***Travel party size:*** Visitors from **Japan** traveling by themselves gave statistically lower satisfaction scores compared to those visiting with at least one other individual.
- ***Education:*** Those without a college degree from **U.S. West** were more satisfied with their stay compared to more educated visitors from this market.

SATISFACTION - O'AHU

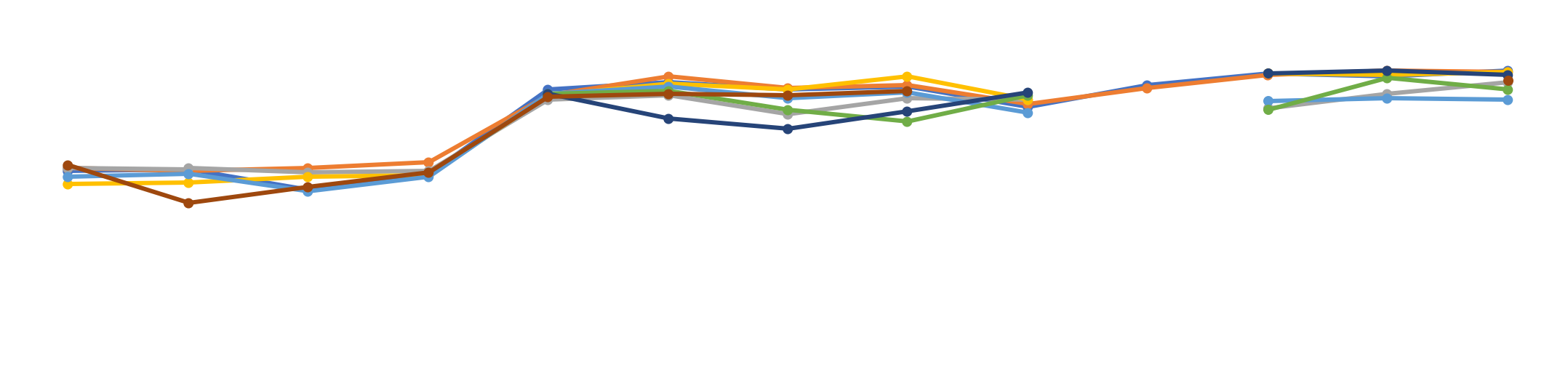
8-pt Rating Scale
8=Excellent/ 1=Poor



SATISFACTION - O‘AHU

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

100.0%
90.0%
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	56.6%	57.1%	51.4%	55.9%	79.1%	81.1%	79.2%	80.0%	74.3%	80.5%	83.4%	82.8%	84.5%
U.S. East	57.3%	56.5%	57.5%	59.1%	77.6%	82.7%	79.5%	80.2%	74.9%	79.6%	83.2%	84.5%	83.8%
Japan	57.6%	57.3%	56.2%	56.6%	76.5%	77.6%	72.2%	76.6%	76.3%		74.0%	78.1%	81.2%
Canada	53.1%	53.3%	55.0%	55.3%	77.6%	80.6%	79.1%	82.6%	76.3%		83.6%	83.3%	84.1%
Oceania	55.0%	55.7%	51.0%	55.2%	77.8%	79.8%	76.8%	78.2%	72.8%		75.8%	76.6%	76.4%
China					78.0%	78.9%	73.6%	70.1%	77.7%		73.5%	82.2%	79.1%
Korea					77.9%	71.2%	68.2%	73.0%	78.2%		83.7%	84.4%	83.0%
Europe	58.4%	47.7%	52.2%	56.1%	77.2%	78.1%	77.5%	78.7%					81.6%

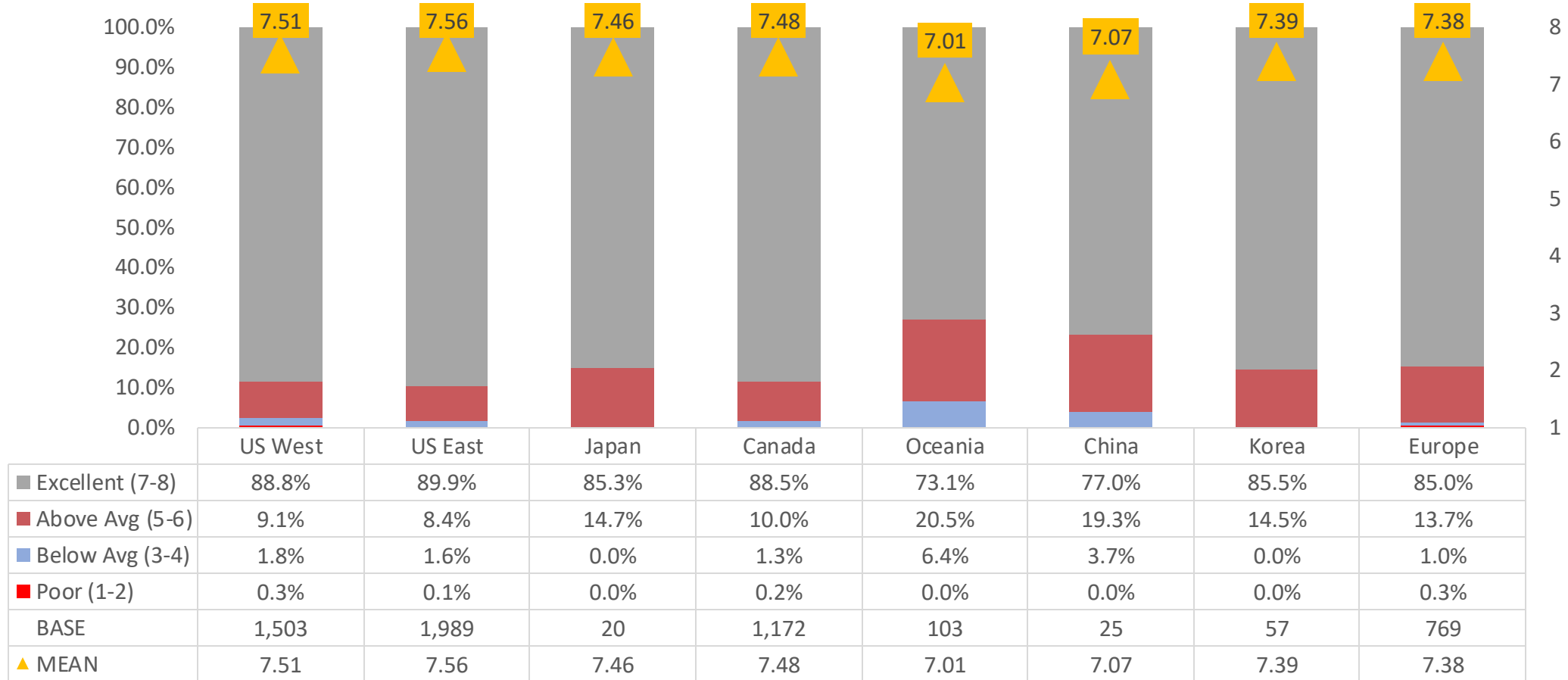
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

SATISFACTION – O‘AHU

- **Islands visited:** Visitors from **U.S. West, U.S. East, Canada, Japan, Europe** and **Korea** who stayed exclusively on O‘ahu gave higher satisfaction scores to the island compared to those who also visited another island during their trip.
- **Trips to Hawai‘i:** First-time visitors from **U.S. West** and **Japan** were more satisfied with their stay on O‘ahu than repeat visitors from these visitor markets.
- **Age:** Among visitors from **U.S. West, Japan** and **Korea**, those under the age of 35 were more satisfied with their stay compared to visitors in other age groups.
- **Gender:** Female visitors from both **U.S. West** and **U.S. East** gave higher satisfaction scores than male visitors from these markets.
- **Household income:** Visitors from **U.S. West** residing in households with annual income below \$100K expressed higher levels of satisfaction compared to those in households with combined income exceeding \$150K.
- **Travel party size:** Travelers from **Japan** in larger travel parties of at least two or more individuals gave higher satisfaction scores.
- **Education:** Visitors without a college degree from **U.S. West** and **U.S. East** gave higher satisfaction scores than visitors with college degrees from these visitor markets.

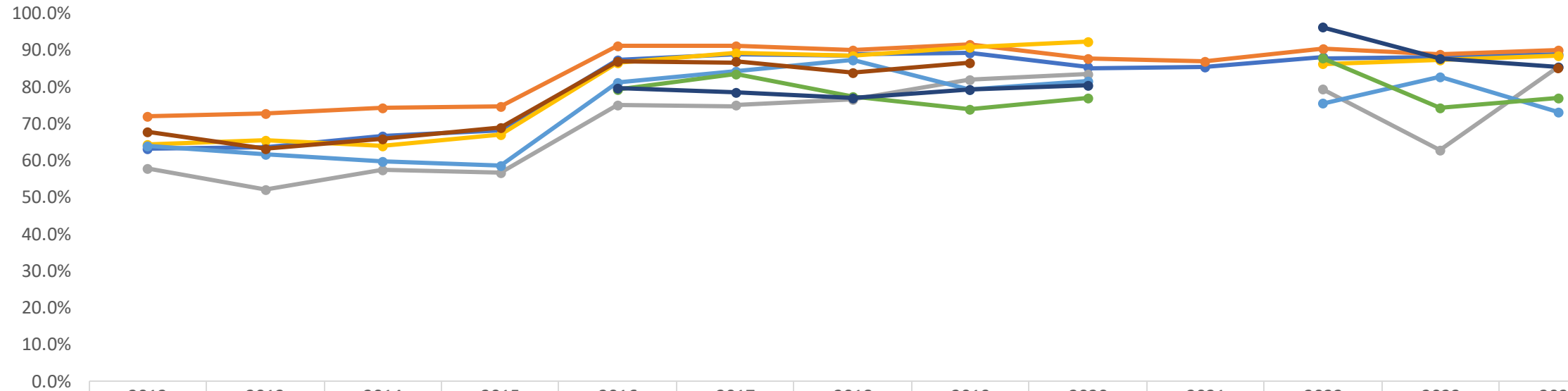
SATISFACTION - MAUI

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



SATISFACTION - MAUI

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	63.1%	63.6%	66.6%	68.2%	87.4%	89.0%	88.9%	89.4%	85.3%	85.4%	88.1%	88.3%	88.8%
U.S. East	72.1%	72.9%	74.5%	74.7%	91.1%	91.1%	90.1%	91.8%	87.7%	87.1%	90.6%	89.0%	89.9%
Japan	57.9%	52.3%	57.4%	56.6%	75.1%	75.0%	76.6%	82.1%	83.5%		79.2%	63.0%	85.3%
Canada	64.3%	65.5%	64.2%	67.1%	86.6%	89.5%	88.5%	90.9%	92.3%		86.3%	87.5%	88.5%
Oceania	64.1%	61.6%	59.7%	58.5%	81.3%	84.5%	87.4%	79.4%	81.6%		75.6%	82.9%	73.1%
China					79.3%	83.6%	77.5%	74.1%	77.0%		87.6%	74.3%	77.0%
Korea					79.7%	78.7%	77.0%	79.4%	80.5%		96.4%	87.7%	85.5%
Europe	67.7%	63.4%	66.0%	69.1%	87.2%	86.9%	84.1%	86.7%					85.0%

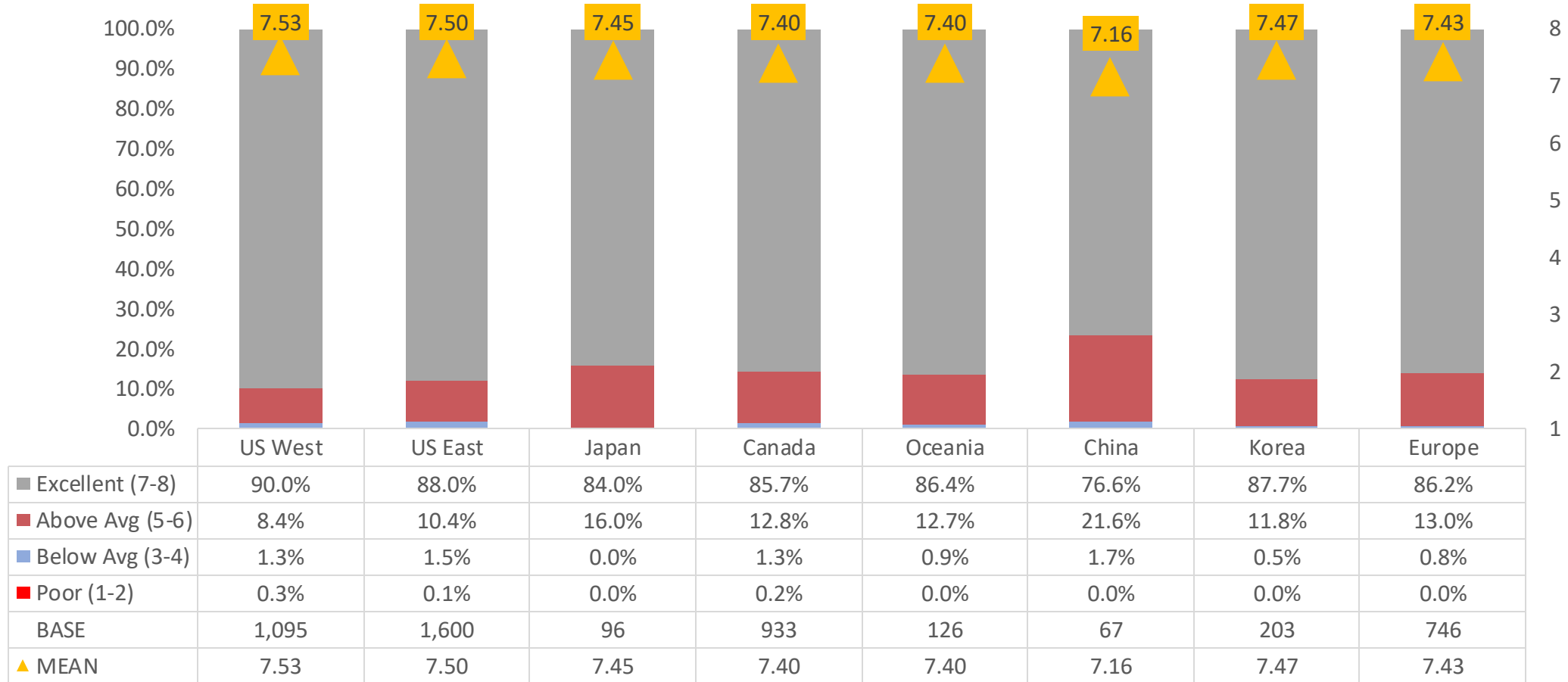
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

SATISFACTION - MAUI

- **Islands visited:** Visitors from **U.S. West** and **U.S. East** who stayed exclusively on Maui gave higher satisfaction scores to the island compared to those who also visited another island during their trip.
- **Age:** Visitors under the age of 35 from **U.S. East** were the most satisfied with their stay on Maui compared to older visitors from this market.
- **Gender:** Female visitors from **U.S. West** gave higher satisfaction scores for their stay on Maui compared to male visitors.
- **Education:** Visitors from **U.S. East** with a college degree were more satisfied with their stay on Maui than visitors without a college degree from this visitor market.

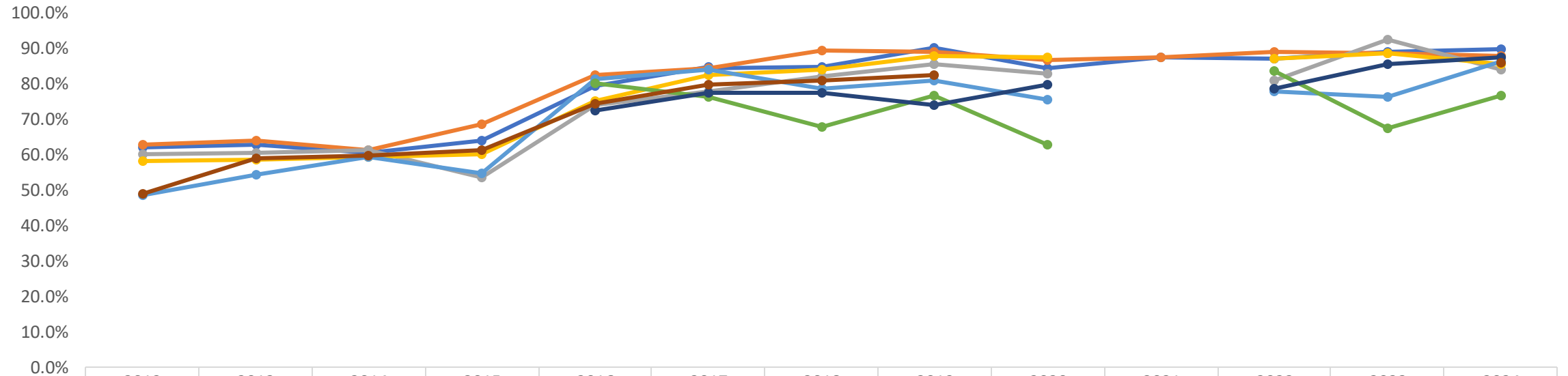
SATISFACTION - ISLAND OF HAWAI‘I

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



SATISFACTION - ISLAND OF HAWAI‘I

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	62.1%	62.8%	60.7%	64.2%	79.4%	84.9%	85.0%	90.1%	84.4%	87.4%	87.3%	89.2%	90.0%
U.S. East	62.7%	63.9%	61.2%	68.7%	82.4%	84.5%	89.4%	89.3%	86.7%	87.5%	89.3%	88.7%	88.0%
Japan	60.1%	60.4%	61.2%	53.5%	74.2%	77.9%	82.2%	85.8%	83.0%		81.1%	92.4%	84.0%
Canada	58.1%	58.7%	59.5%	60.1%	75.1%	82.4%	83.9%	87.9%	87.4%		87.2%	88.7%	85.7%
Oceania	48.7%	54.3%	59.5%	54.6%	81.5%	84.0%	78.7%	81.1%	75.7%		77.8%	76.2%	86.4%
China					80.3%	76.2%	67.7%	76.6%	63.0%		83.7%	67.6%	76.6%
Korea					72.5%	77.4%	77.4%	74.1%	79.7%		78.6%	85.7%	87.7%
Europe	49.1%	58.9%	59.7%	61.3%	74.3%	79.8%	81.1%	82.6%					86.2%

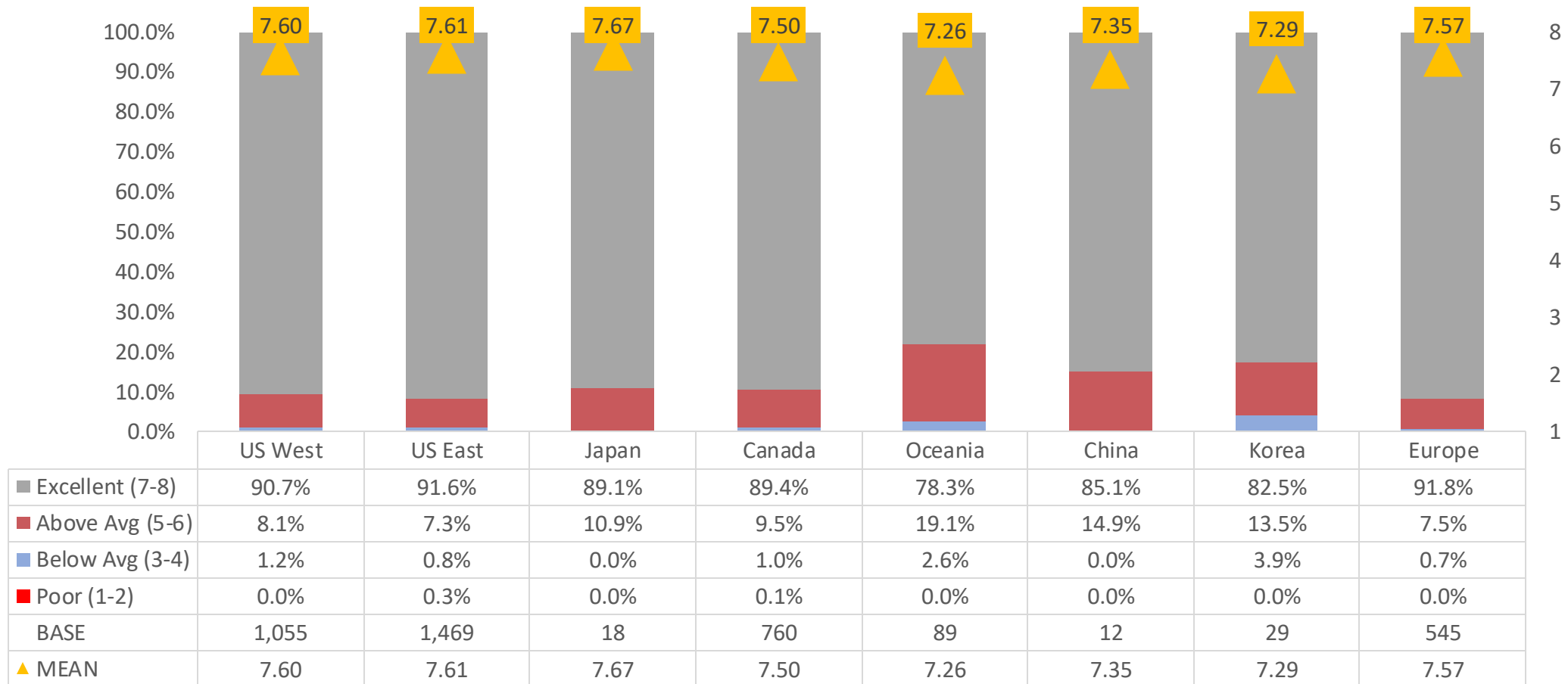
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

SATISFACTION - ISLAND OF HAWAI'I

- ***Trips to Hawai'i:*** First-time visitors from **Japan** gave higher satisfaction scores when rating their stay on the Island of Hawai'i compared to repeat visitors from this market.
- ***Gender:*** Female travelers from **U.S. West** and **U.S. East** were more satisfied with their stay than male travelers from these visitor markets.
- ***Islands visited:*** Visitors from **U.S. West** and **U.S. East** who stayed exclusively on the Island of Hawai'i gave higher satisfaction scores to the island compared to those who also visited another island during their trip. The opposite is true for visitors from **Japan** where those who visited multiple islands including the island of Hawai'i gave this island a higher score.
- ***Household income:*** Visitors from **U.S. West** in households with annual income below \$100K expressed higher levels of satisfaction with their stay on the Island of Hawai'i compared to those in households with combined income of more than \$150K.
- ***Travel party size:*** Travelers from **Japan** in larger groups of three or more were the most satisfied with their stay on this island.

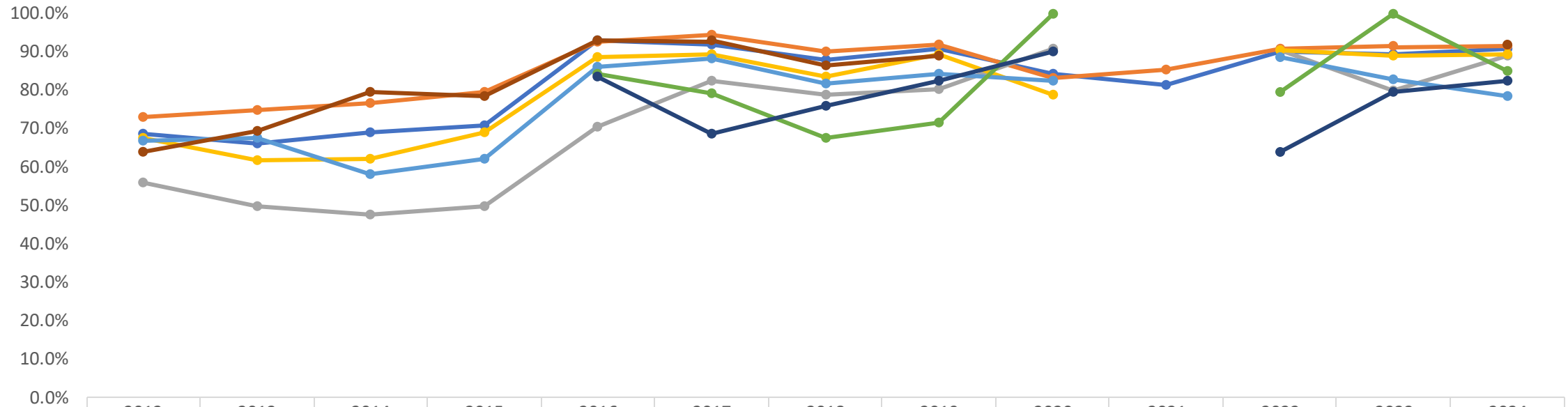
SATISFACTION - KAUAI

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



SATISFACTION - KAUA'I

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



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	68.8%	66.0%	69.1%	70.9%	92.9%	91.9%	87.9%	90.9%	84.2%	81.2%	89.9%	89.3%	90.7%
U.S. East	73.1%	74.7%	76.7%	79.7%	92.6%	94.5%	90.1%	92.0%	83.0%	85.2%	90.8%	91.4%	91.6%
Japan	55.8%	49.7%	47.6%	49.9%	70.4%	82.3%	78.7%	80.3%	90.6%		90.4%	80.0%	89.1%
Canada	67.5%	61.8%	62.1%	68.9%	88.7%	89.3%	83.4%	89.5%	78.9%		90.3%	89.1%	89.4%
Oceania	66.7%	67.7%	58.0%	62.0%	86.1%	88.4%	81.8%	84.1%	82.4%		88.6%	82.9%	78.3%
China					84.4%	79.1%	67.6%	71.4%	100.0%		79.7%	100.0%	85.1%
Korea					83.4%	68.8%	75.9%	82.6%	90.1%		63.9%	79.5%	82.5%
Europe	63.9%	69.5%	79.7%	78.6%	93.1%	93.0%	86.5%	88.8%					91.8%

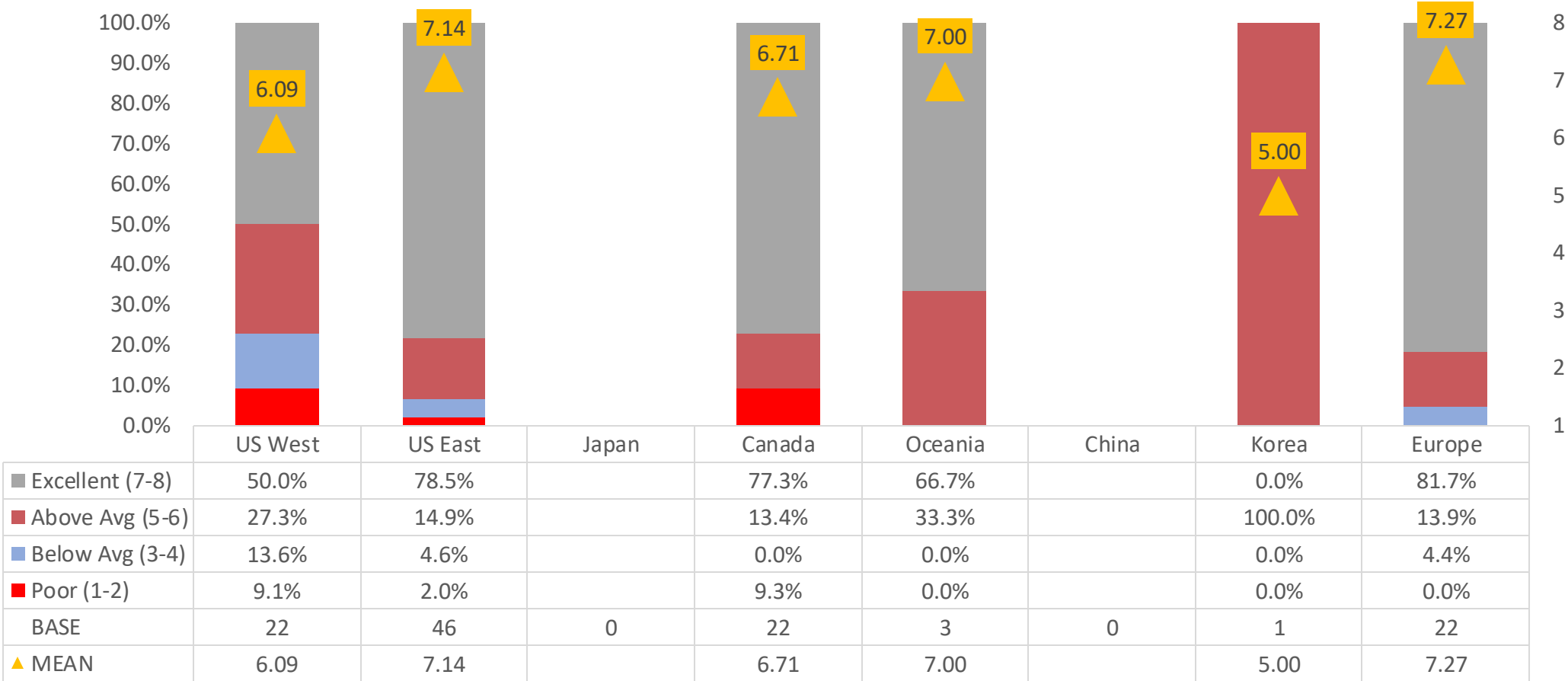
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

SATISFACTION - KAUA'I

- **Gender:** Female visitors from **U.S. West** gave higher satisfaction scores than male visitors.
- **Islands visited:** Visitors from **U.S. West** who stayed exclusively on Kaua'i gave higher satisfaction scores to the island compared to those who also visited another island during their trip.
- **Age:** Travelers from **U.S. West** between the ages of 35-49 were the most satisfied with their stay particularly when compared to older visitors from this market.

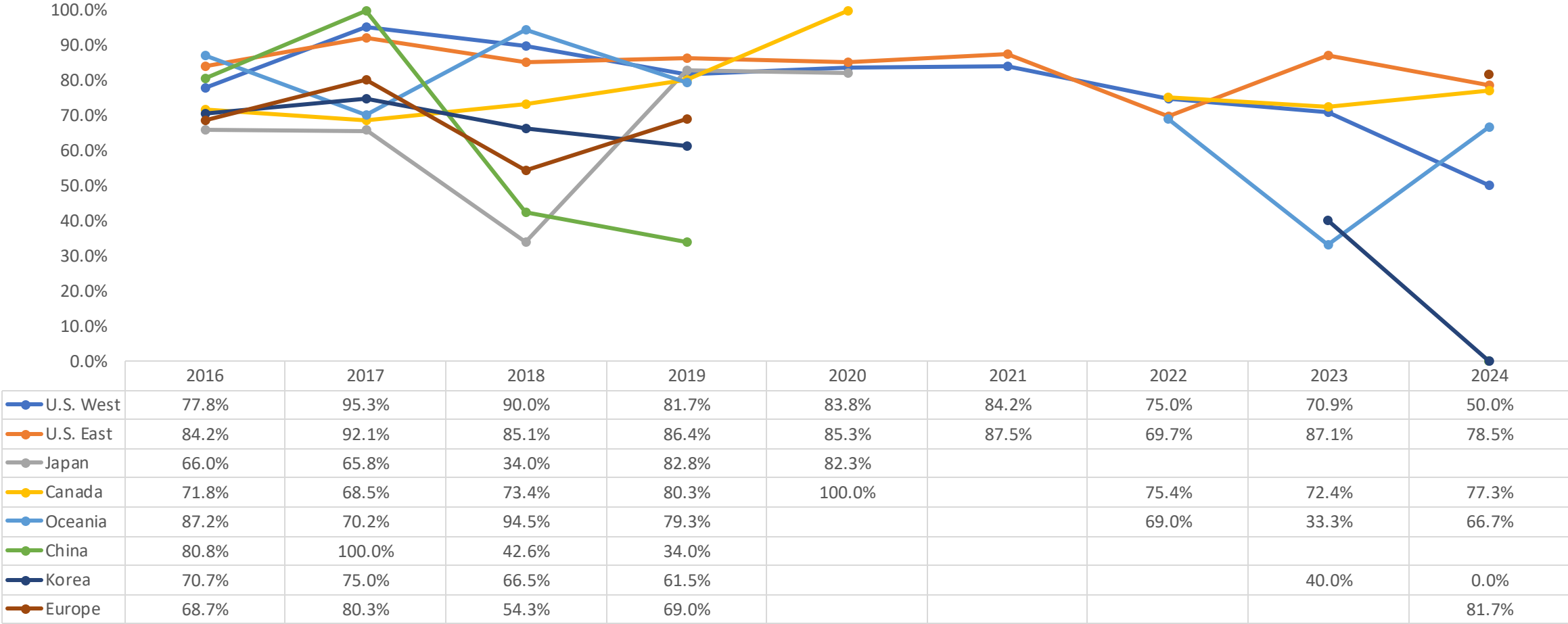
SATISFACTION - MOLOKA‘I

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



SATISFACTION - MOLOKA‘I

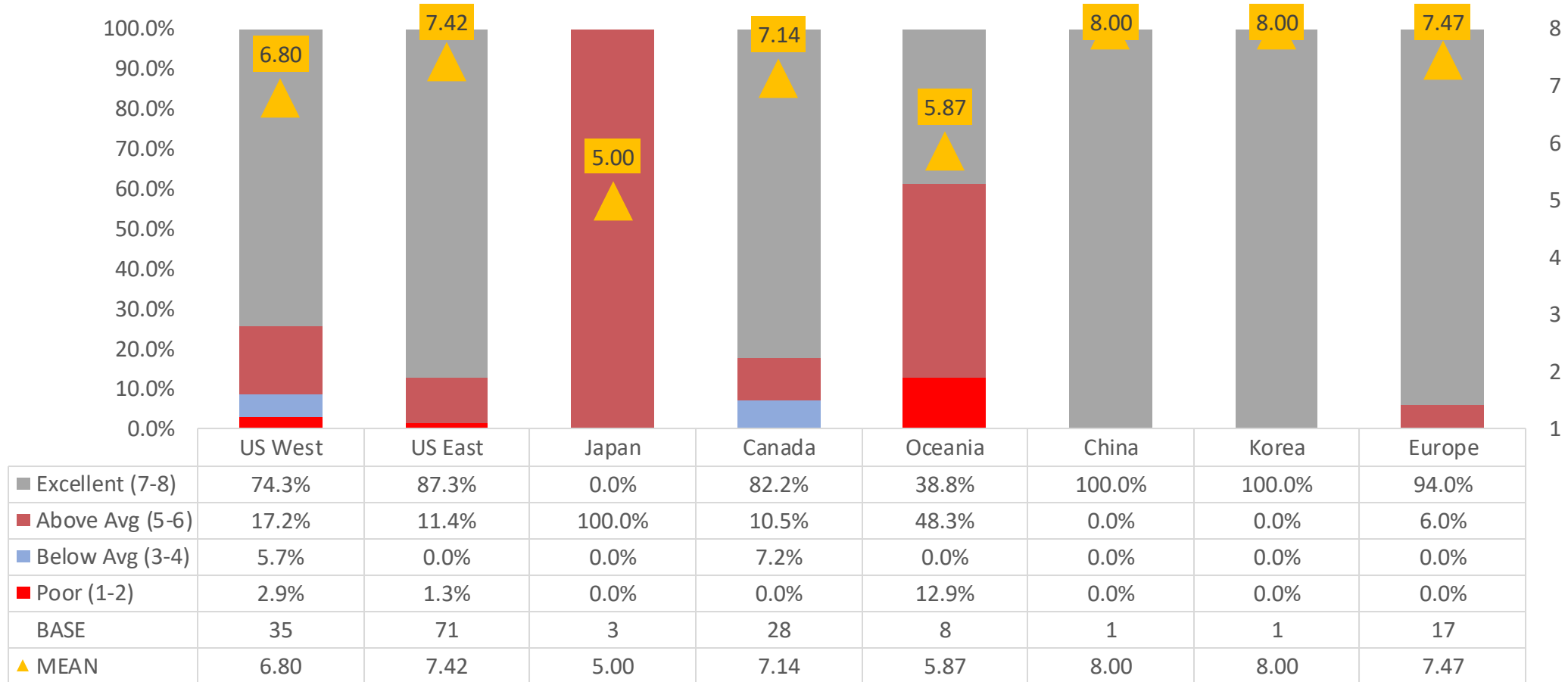
Tracking Data – Rating of “Excellent” (7-8)



Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

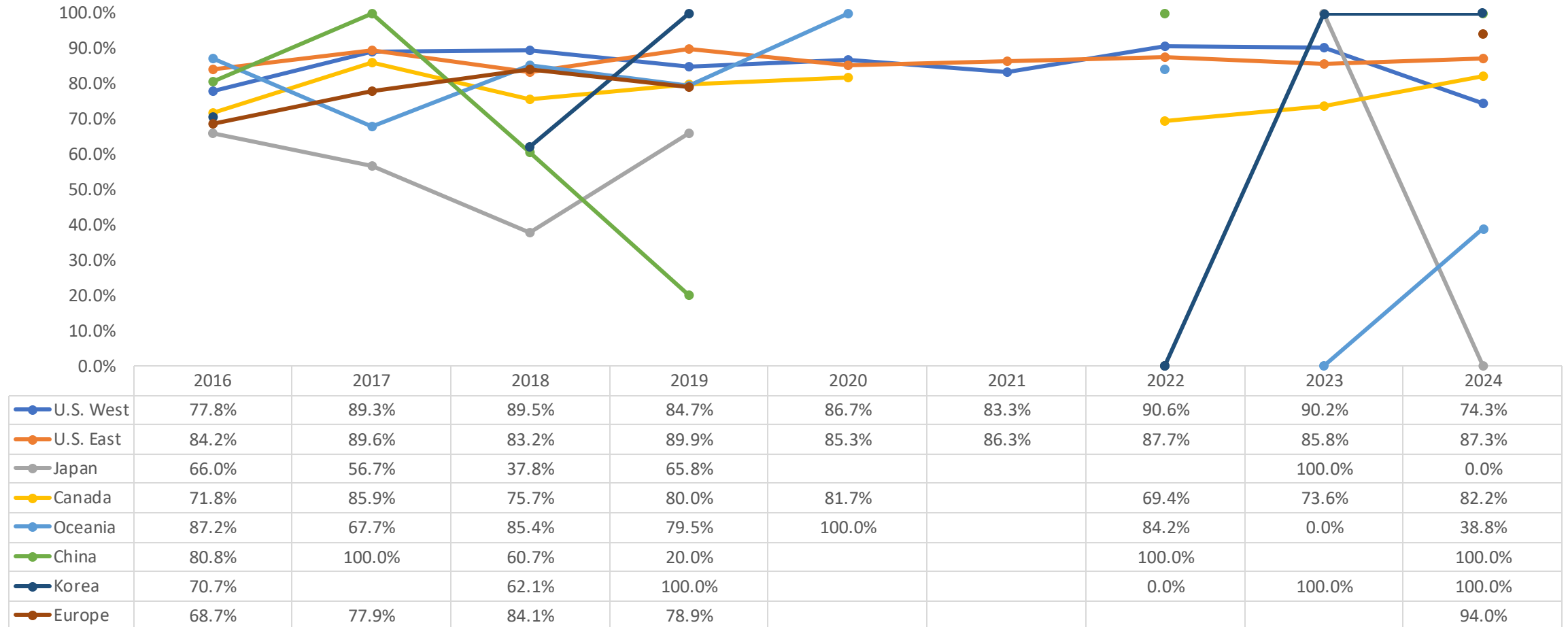
SATISFACTION - LĀNA‘I

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



SATISFACTION - LĀNA‘I

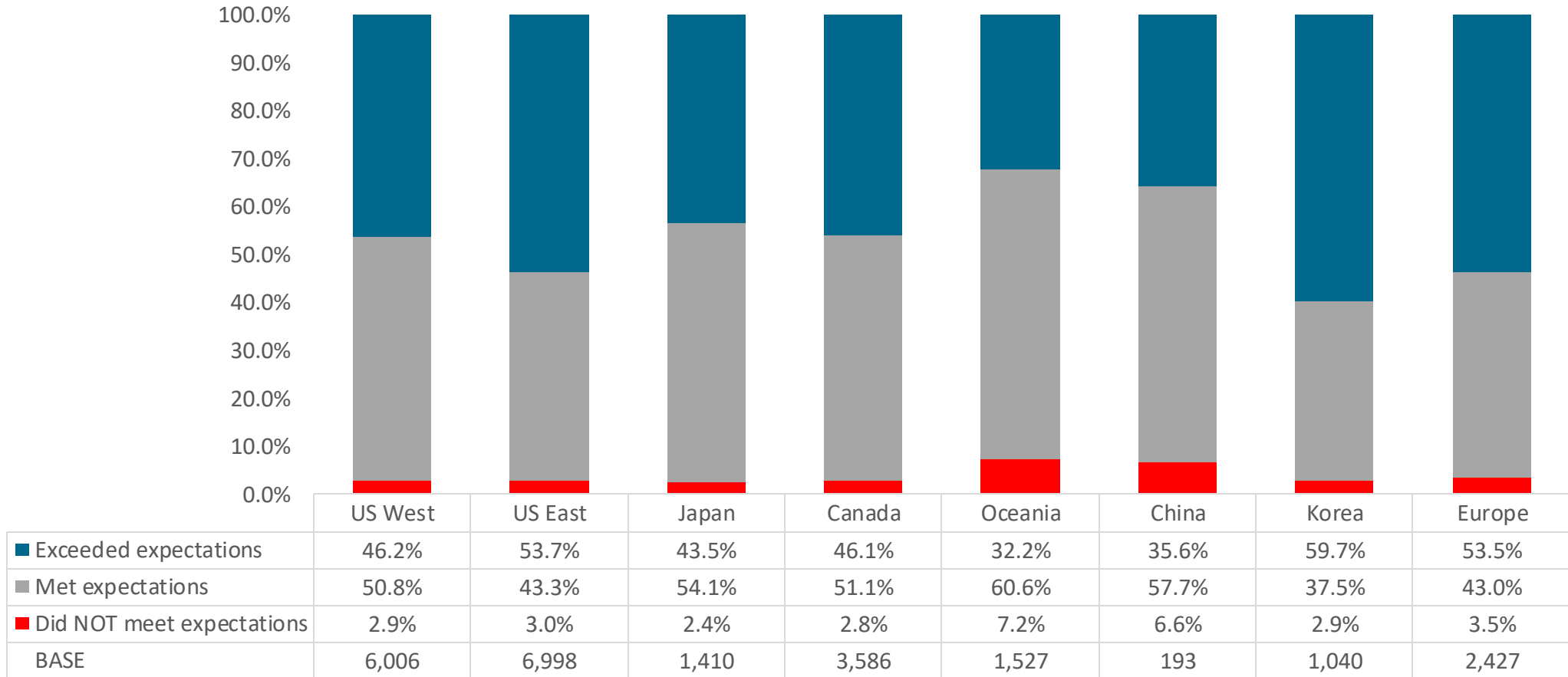
Tracking Data – Rating of “Excellent” (7-8)



Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

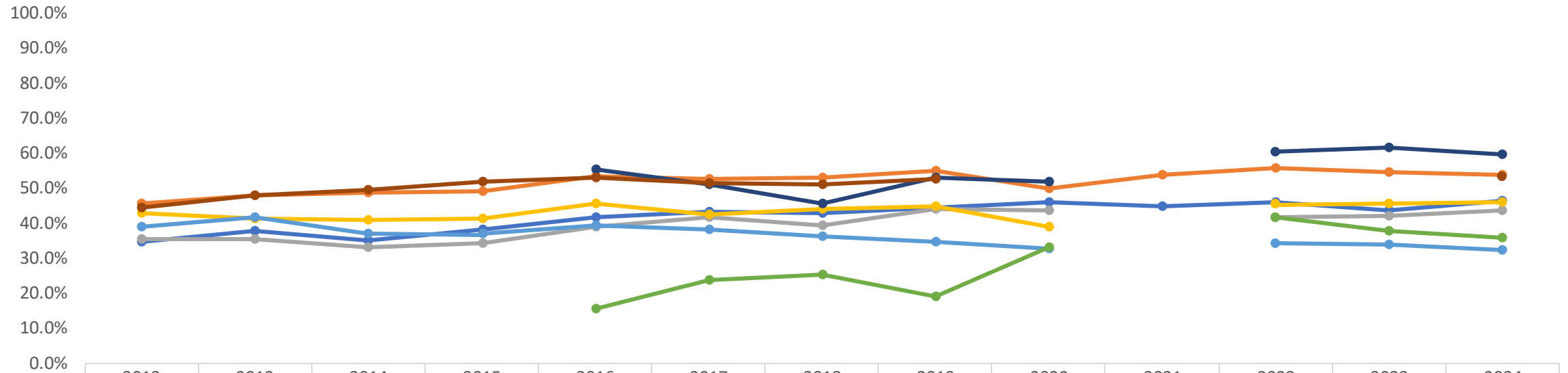
Section 2 – Trip Expectations

SATISFACTION - HAWAI'I TRIP EXPECTATIONS



SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
U.S. West	34.7%	37.9%	34.8%	38.2%	41.7%	43.3%	43.0%	44.2%	45.9%	44.7%	45.8%	43.7%	46.2%
U.S. East	45.5%	48.0%	48.7%	49.1%	53.3%	52.7%	52.9%	55.0%	50.0%	53.9%	55.7%	54.7%	53.7%
Japan	35.4%	35.4%	33.0%	34.4%	39.0%	41.8%	39.2%	43.9%	43.7%		41.5%	42.1%	43.5%
Canada	42.8%	41.4%	40.7%	41.2%	45.6%	42.3%	44.0%	44.8%	38.9%		45.5%	45.6%	46.1%
Oceania	39.0%	41.6%	36.9%	36.8%	39.2%	38.0%	36.3%	34.5%	32.7%		34.3%	34.0%	32.2%
China					15.6%	23.7%	25.4%	18.8%	32.9%		41.7%	37.9%	35.6%
Korea					55.2%	51.1%	45.6%	52.9%	51.6%		60.5%	61.6%	59.7%
Europe	44.3%	47.9%	49.5%	51.9%	53.0%	51.4%	51.0%	52.5%					53.5%

Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

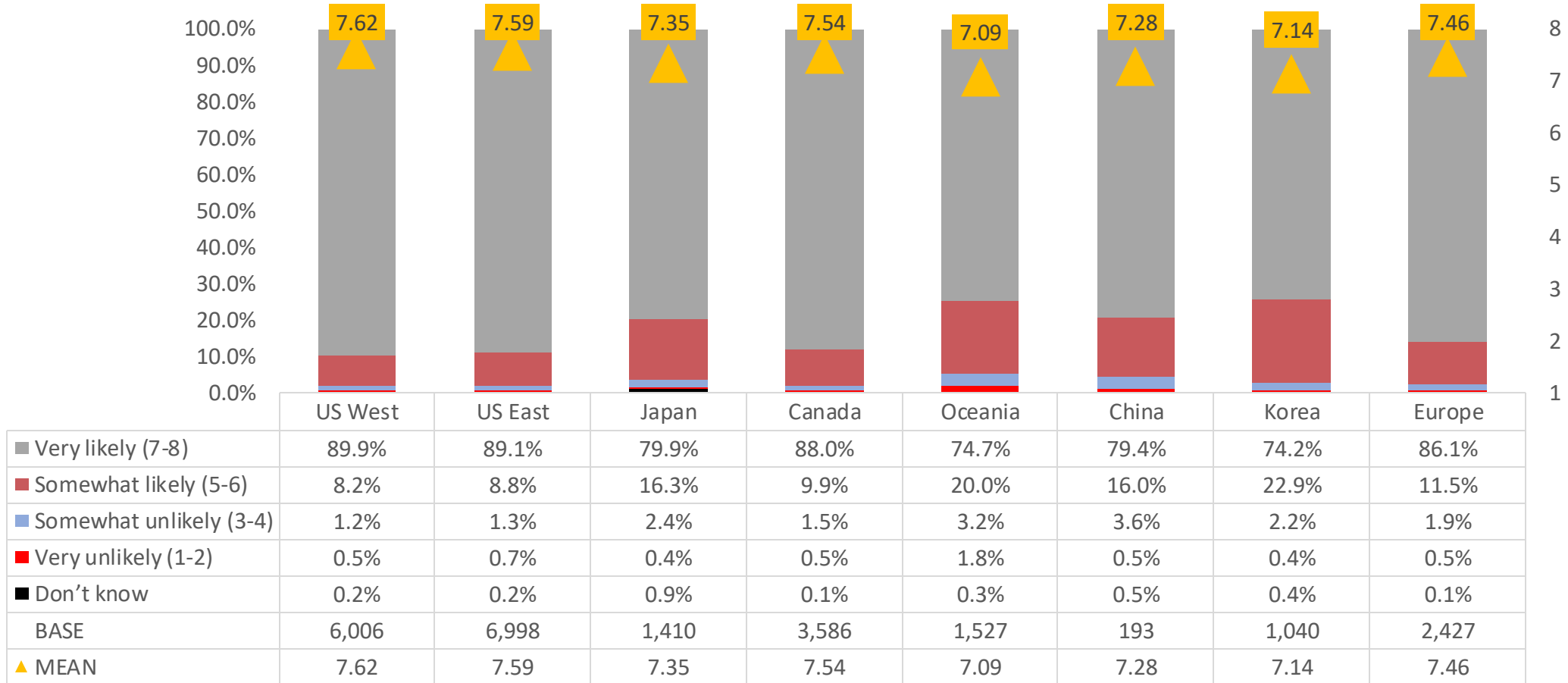
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- **Education:** Visitors from **Canada** with a college degree were more satisfied with their trip in terms of exceeding their expectations compared to those without a college degree.
- **Age:** Visitors from **U.S. East, U.S. West, Oceania, Japan, Canada,** and **Korea** under the age of 35 were more likely to feel that their stay exceeded expectations.
- **Gender:** Female visitors gave higher satisfaction scores when rating trip expectations compared to male visitors from **U.S. West** and **U.S. East**.
- **Trips to Hawai'i:** First-time visitors from **U.S. West, U.S. East, Korea, Japan, Europe, Canada,** and **Oceania** gave higher satisfaction scores than repeat visitors from these markets when rating their trip expectations.
- **Household income:** Visitors from **U.S. West** with annual household income below \$100K were the most satisfied when it came to trip expectations compared to more affluent visitors from this market.
- **Islands visited:** **U.S. West** respondents who visited just a single island were more likely to say their trip exceeded expectations compared to those whose trip included stops on multiple islands.
- **Travel party size:** Visitors from **U.S. East** and **Japan** who traveled alone gave lower satisfaction scores compared to those traveling with at least one other individual.

Section 3 – Brand/ Destination Advocacy

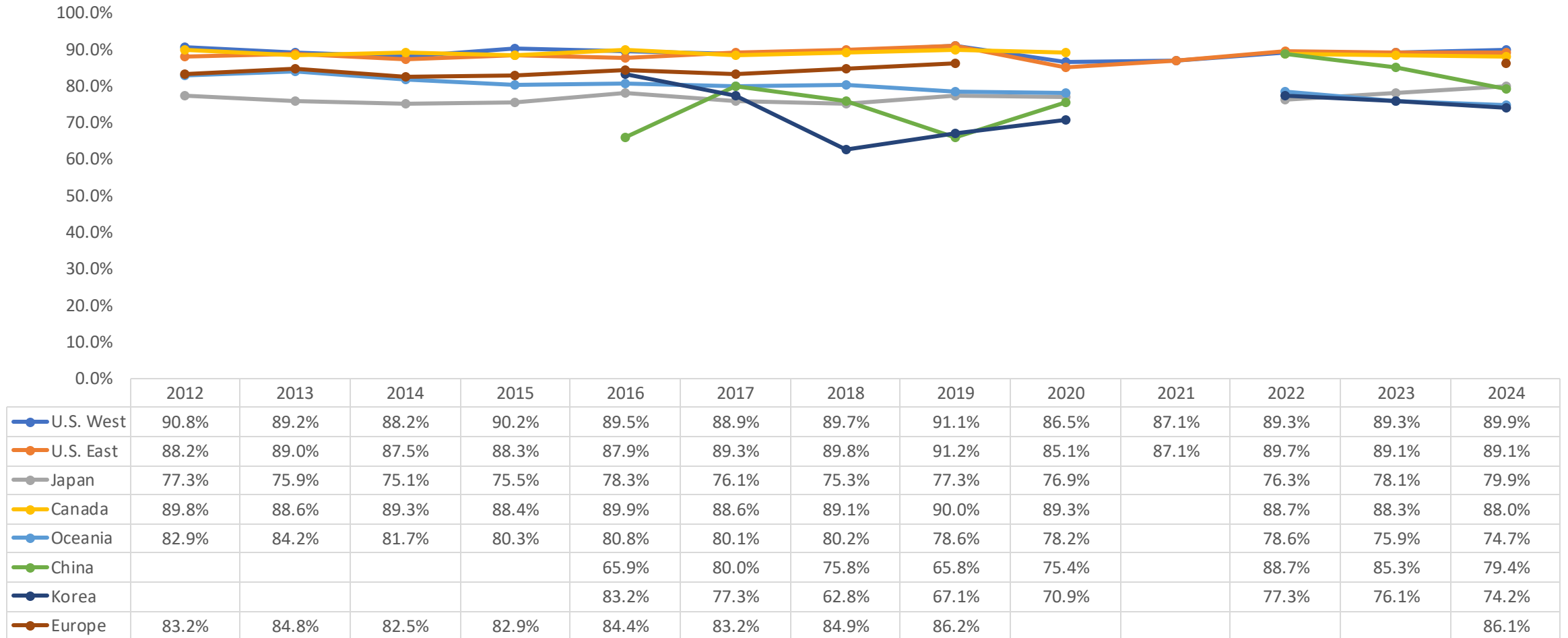
BRAND/ DESTINATION - ADVOCACY

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



BRAND/ DESTINATION - ADVOCACY

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



Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

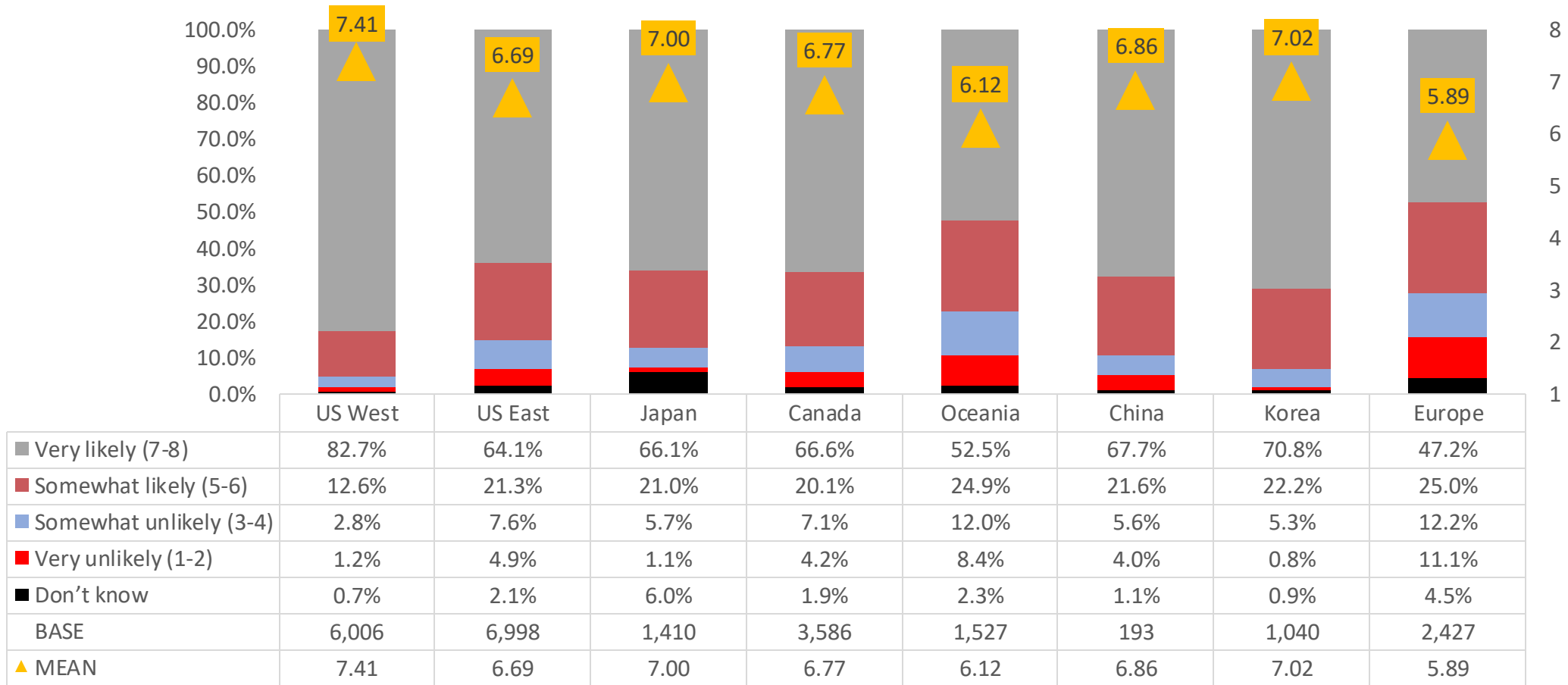
BRAND/ DESTINATION - ADVOCACY

- **Age:** Among visitors from **Japan**, younger respondents under the age of 35 were the strongest brand advocates for Hawai'i.
- **Gender:** Female visitors from **U.S. West**, **U.S. East**, and **Japan** all gave higher advocacy scores, indicating a greater likelihood to recommend travel to the state compared to male visitors from these markets.
- **Trips to Hawai'i:** Repeat visitors to the state from **U.S. West** and **U.S. East** were more likely to recommend the state to others than first-time visitors from these markets. Conversely, first-time visitors from **Japan** were more likely to recommend the state to others than repeat visitors.
- **Islands visited:** **U.S. West** respondents who visited just a single island were more likely to recommend the state to others compared to those who visited multiple islands during their stay.
- **Travel party size:** Those who traveled alone from **U.S. East** were less likely to recommend the state to others compared to those traveling with at least one other individual from this visitor market.

Section 4 – Brand/ Destination Loyalty

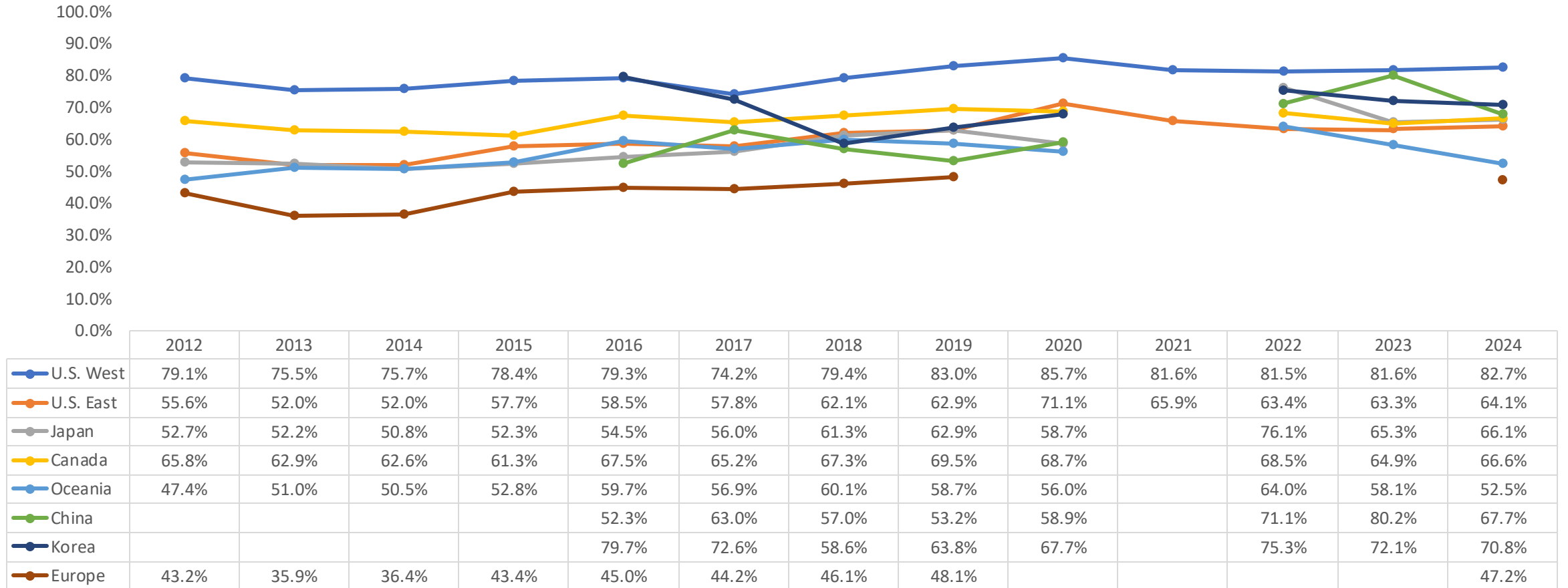
LIKELIHOOD OF RETURN VISIT

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



LIKELIHOOD OF RETURN VISIT

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



Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from **U.S. West, U.S. East, Japan, Europe, Canada** and **Oceania** expressed a greater likelihood to return to the state than first-time visitors from these markets.
- ***Islands visited:*** Among visitors from **U.S. West, U.S. East, Canada** and **Europe**, those who visited a single island expressed a greater likelihood to return to the state compared to those who went to multiple islands during their trip.
- ***Gender:*** Female visitors from **U.S. West** expressed a greater willingness to return to the state compared to male visitors from this market.
- ***Household income:*** Visitors from **U.S. West** and **U.S. East** who reside in more affluent households (\$150K+) anticipated a greater likelihood of returning to the state than less affluent visitors from these markets.
- ***Education:*** Visitors from **U.S. West** and **U.S. East** without a college degree gave higher mean scores (greater likelihood to return) compared to visitors from these markets with a college degree.
- ***Travel party size:*** Travelers from **U.S. West** and **U.S. East** who traveled here by themselves were more likely to return in the next five years compared to those who traveled here with at least one other individual.
- ***Age:*** Young adults under the age of 35 from **U.S. West** and **Japan** were the least likely to anticipate returning to the state in the next five years compared to older travelers. The opposite was true amongst travelers from **U.S. East**, where seniors (65+) were the least likely to return in the next five years.

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

TOP RESPONSES 10%+

2023 n=326	2024 n=284
52.9% Too expensive	57.0% Too expensive
34.3% Want to go someplace new	32.8% Want to go someplace new
33.1% Poor value	28.9% Poor value
25.6% Too crowded/ congested/ traffic	23.6% Too crowded/ congested/ traffic
17.4% Too commercialized/ overdeveloped	16.6% No reason to return/ nothing new
14.9% No reason to return/ nothing new	16.2% Too commercialized/ overdeveloped
12.9% Unfriendly people/ felt unwelcome	15.8% Five years is too soon
11.4% Five years is too soon	10.9% Flight is too long
10.2% Other financial obligations	

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

TOP RESPONSES 10%+

2023 n=972	2024 n=1,043
53.8% Too expensive	53.6% Too expensive
44.2% Flight too long	41.1% Flight too long
37.7% Want to go someplace new	40.1% Want to go someplace new
17.2% Poor value	18.8% Poor value
16.6% Five years is too soon	15.8% Five years is too soon
14.4% Too crowded/ congested/ traffic	15.7% Too crowded/ congested/ traffic
12.5% Other financial obligations	12.9% Other financial obligations
11.3% Too commercialized/ overdeveloped	

UNLIKELY TO RETURN - TOP REASONS JAPAN

TOP RESPONSES 10%+

2023 n=100	2024 n=174
65.1% Too expensive	67.3% Too expensive
22.9% Five years is too soon	33.5% Five years is too soon
21.9% Want to go someplace new	32.1% Want to go someplace new
17.9% Other financial obligations	22.1% Other financial obligations
10.0% Poor health/ old age	

UNLIKELY TO RETURN - TOP REASONS CANADA

TOP RESPONSES 10%+

2023 n=490	2024 n=494
59.6% Too expensive	62.1% Too expensive
39.5% Want to go someplace new	39.5% Want to go someplace new
33.3% Flight too long	30.5% Flight too long
22.5% Poor value	20.8% Poor value
15.6% Five years is too soon	20.6% Five years is too soon
13.3% Other financial obligations	13.3% Other financial obligations
10.6% Too crowded/ congested/ traffic	
10.1% Too commercialized/ overdeveloped	

UNLIKELY TO RETURN - TOP REASONS OCEANIA

TOP RESPONSES 10%+

2023 n=264	2024 n=331
60.2% Too expensive	54.6% Too expensive
40.5% Poor value	36.3% Want to go someplace new
33.9% Want to go someplace new	32.1% Poor value
24.4% Too commercialized/ overdeveloped	23.9% Too commercialized/ overdeveloped
18.4% Too crowded/ congested/ traffic	18.4% Too crowded/ congested/ traffic
13.9% No reason to return/ nothing new	17.7% No reason to return/ nothing new
13.3% Five years is too soon	13.3% Flight too long
11.2% Flight too long	11.3% Five years is too soon

UNLIKELY TO RETURN - TOP REASONS CHINA

TOP RESPONSES 10%+

2023 n=10	2024 n=21
52.9% Flight too long	47.7% Poor value
34.1% Too expensive	43.2% Too expensive
34.1% Unfriendly people/ felt unwelcome	29.5% No reason to return/ nothing new
24.7% Poor value	28.4% Want to go someplace new
24.7% Too commercialized/ overdeveloped	28.4% Flight too long
18.8% Airport/ immigration issue	19.3% Unfriendly people/ felt unwelcome
18.8% Crime/ safety concerns	19.3% Too crowded/ congested/ traffic
18.8% No reason to return/ nothing new	19.3% Five years is too soon
15.3% Too crowded/ congested/ traffic	10.2% Too commercialized/ overdeveloped

CAUTION SMALL BASES

UNLIKELY TO RETURN - TOP REASONS KOREA

TOP RESPONSES 10%+

2023 n=108	2024 n=74
68.3% Too expensive	76.3% Too expensive
35.0% Poor value	40.9% Poor value
27.4% Flight too long	25.3% Flight too long
24.7% Five years is too soon	25.0% Want to go someplace new
19.9% No reason to return/ nothing new	18.8% No reason to return/ nothing new
19.0% Other financial obligations	15.2% Five years is too soon
18.9% Want to go someplace new	14.6% Other financial obligations
12.8% Too crowded/ congested/ traffic	

UNLIKELY TO RETURN - TOP REASONS EUROPE

TOP RESPONSES 10%+

2019 n=462	2024 n=670
61.7% Flight too long	60.8% Flight too long
50.7% Too expensive	55.4% Too expensive
38.1% Want to go someplace new	35.5% Want to go someplace new
23.1% Five years is too soon	23.0% Five years is too soon
13.1% Too commercialized/ overdeveloped	15.2% Poor value
11.9% Poor value	12.2% Too commercialized/ overdeveloped
10.7% Other financial obligations	11.6% Other financial obligations

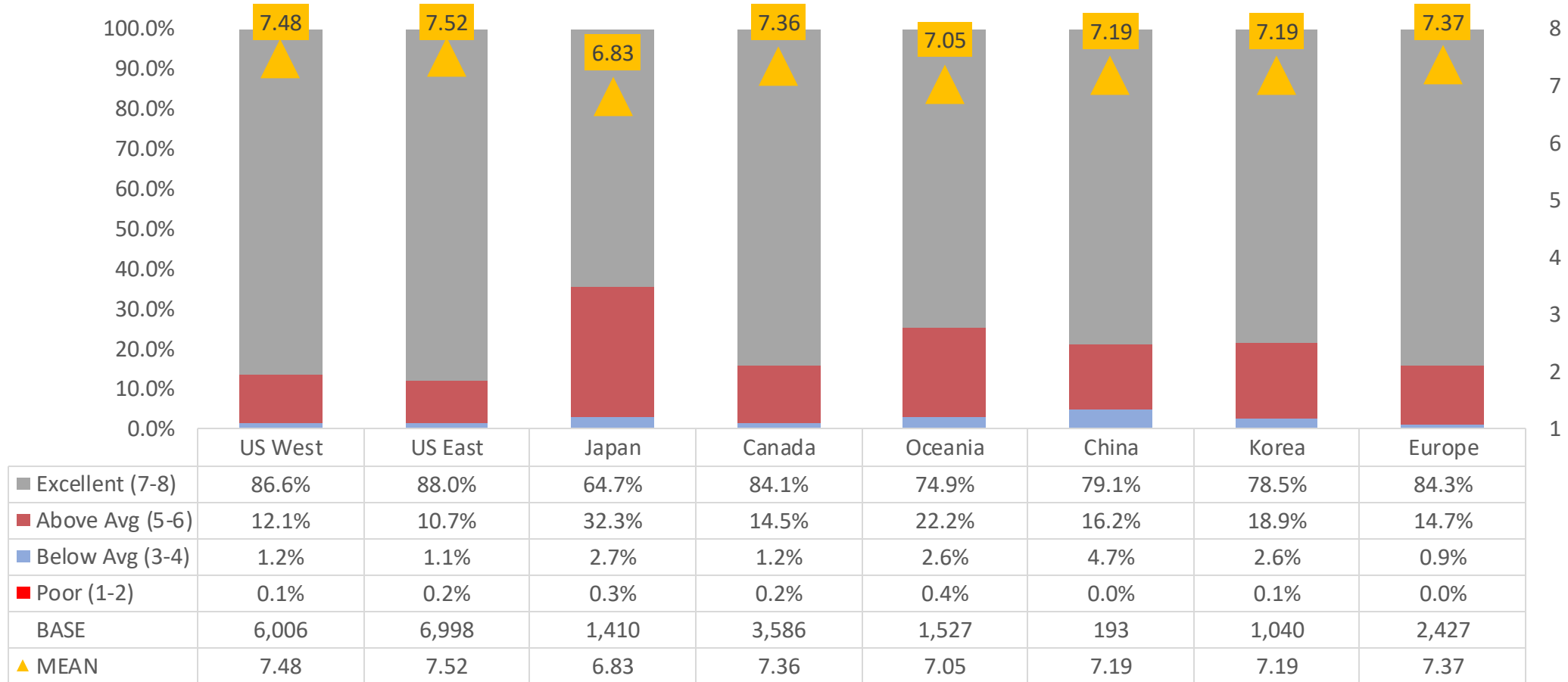
For Europe, the pandemic resulted in too few travelers in the second half of 2020.

Visitors from Europe were not surveyed in 2021 through 2023.

Section 5 – Experiences

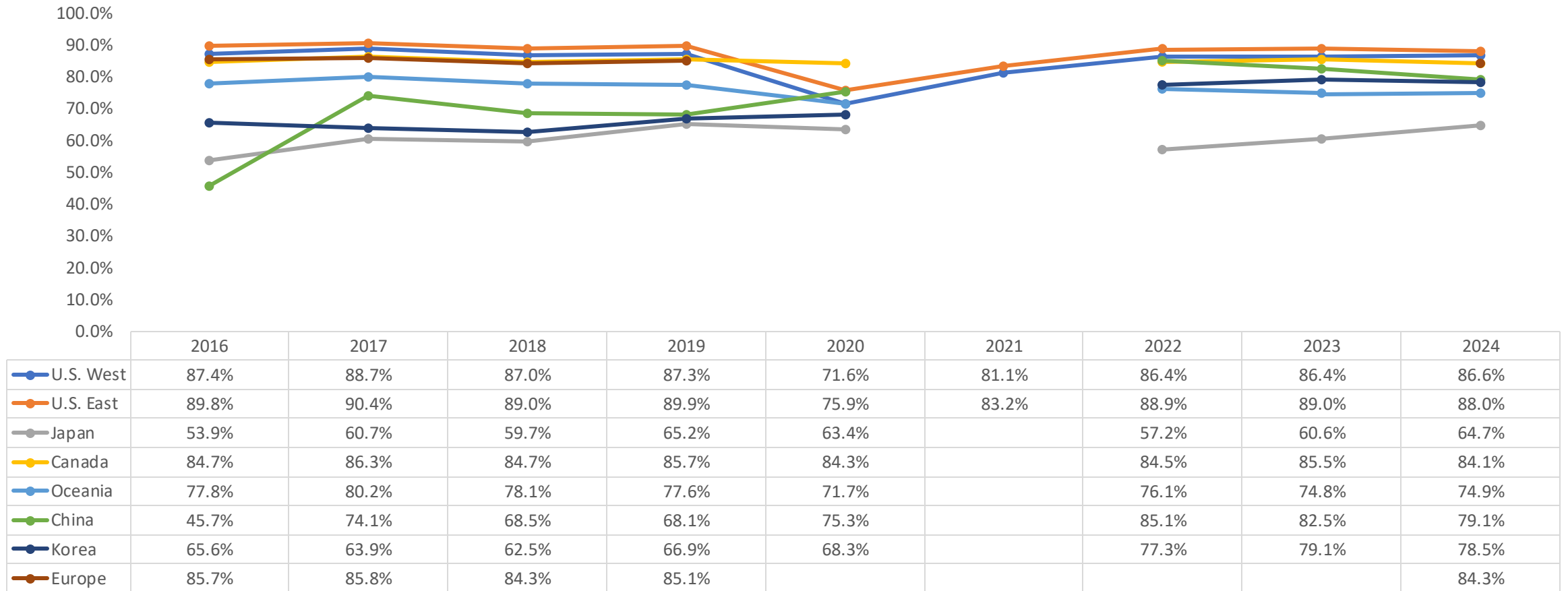
OFFERING A VARIETY OF EXPERIENCES

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



OFFERING A VARIETY OF EXPERIENCES

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



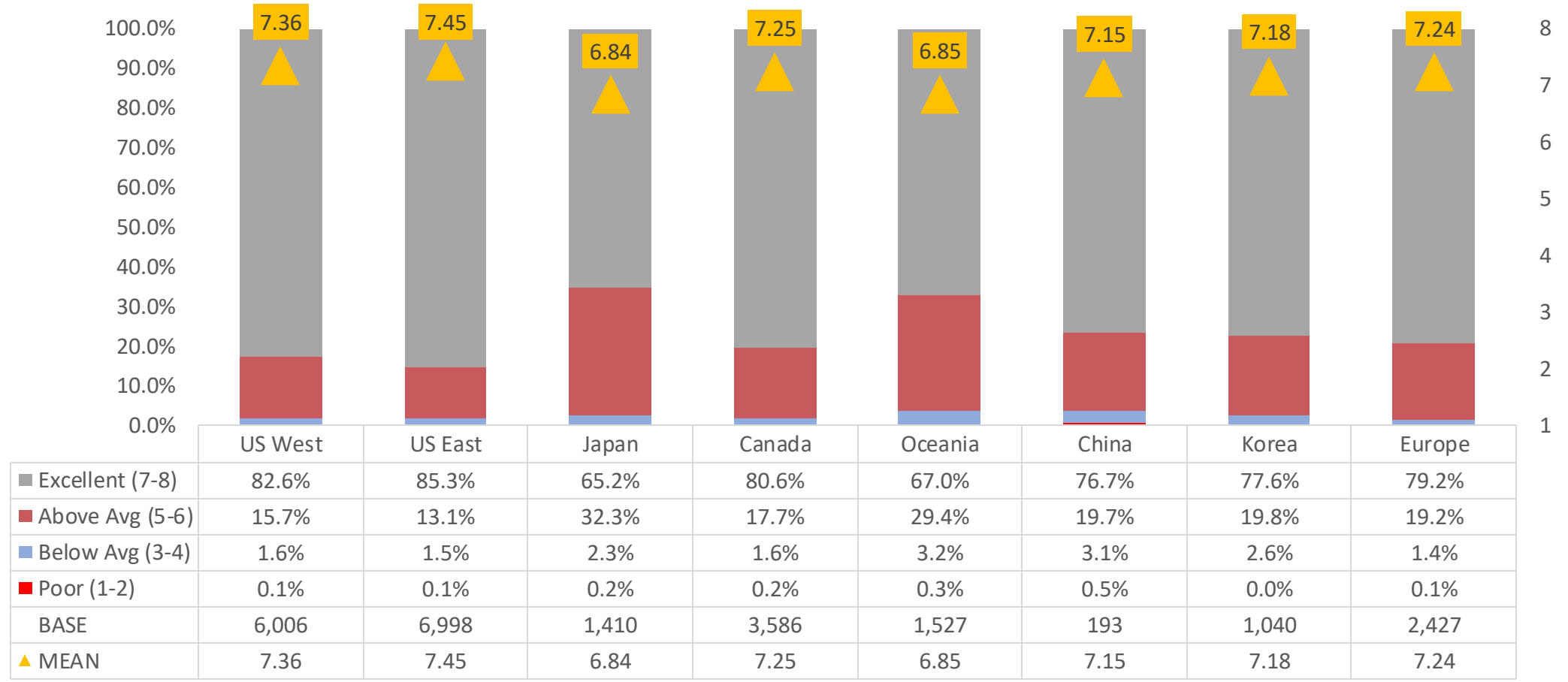
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

OFFERING A VARIETY OF EXPERIENCES

- **Age:** When evaluating their stay based on the variety of experiences offered, younger visitors under the age of 35 from **U.S. West, U.S. East, Korea** and **Japan** gave the highest satisfaction scores compared to those in other age groups.
- **Trips to Hawai'i:** First-time visitors from **Japan** gave higher satisfaction score in this area than repeat visitors from this market.
- **Islands visited:** **U.S. East** visitors whose trip included stays on multiple islands gave higher scores compared to visitors from this market whose stay consisted of visiting a single island.
- **Gender:** Female visitors from **U.S. West** and **U.S. East** were more satisfied with the variety of experiences than their male counterparts.
- **Household income:** **U.S. West** visitors with annual household income of less than \$100K were the more satisfied with the variety of experiences offered during their stay.
- **Travel party size:** Those who traveled by themselves from **U.S. West, U.S. East** and **Japan** gave lower satisfaction scores.
- **Education:** Travelers from **U.S. West** without a college degree were more satisfied in this area.

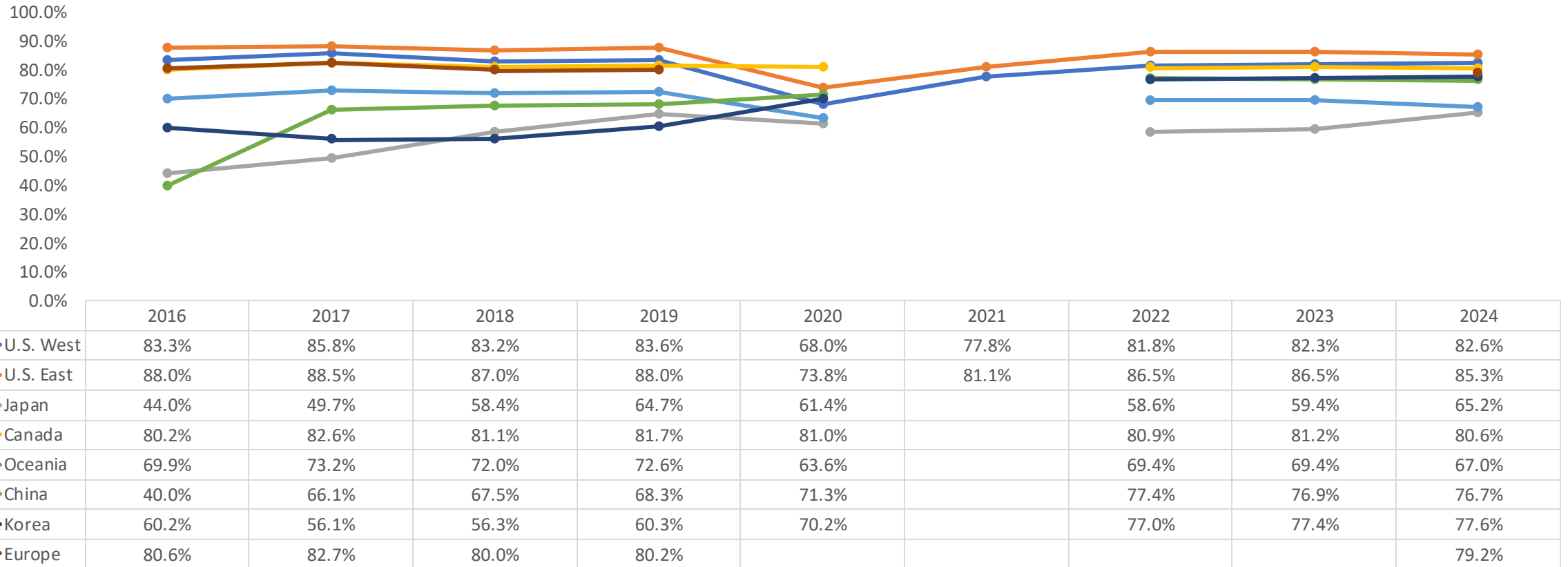
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

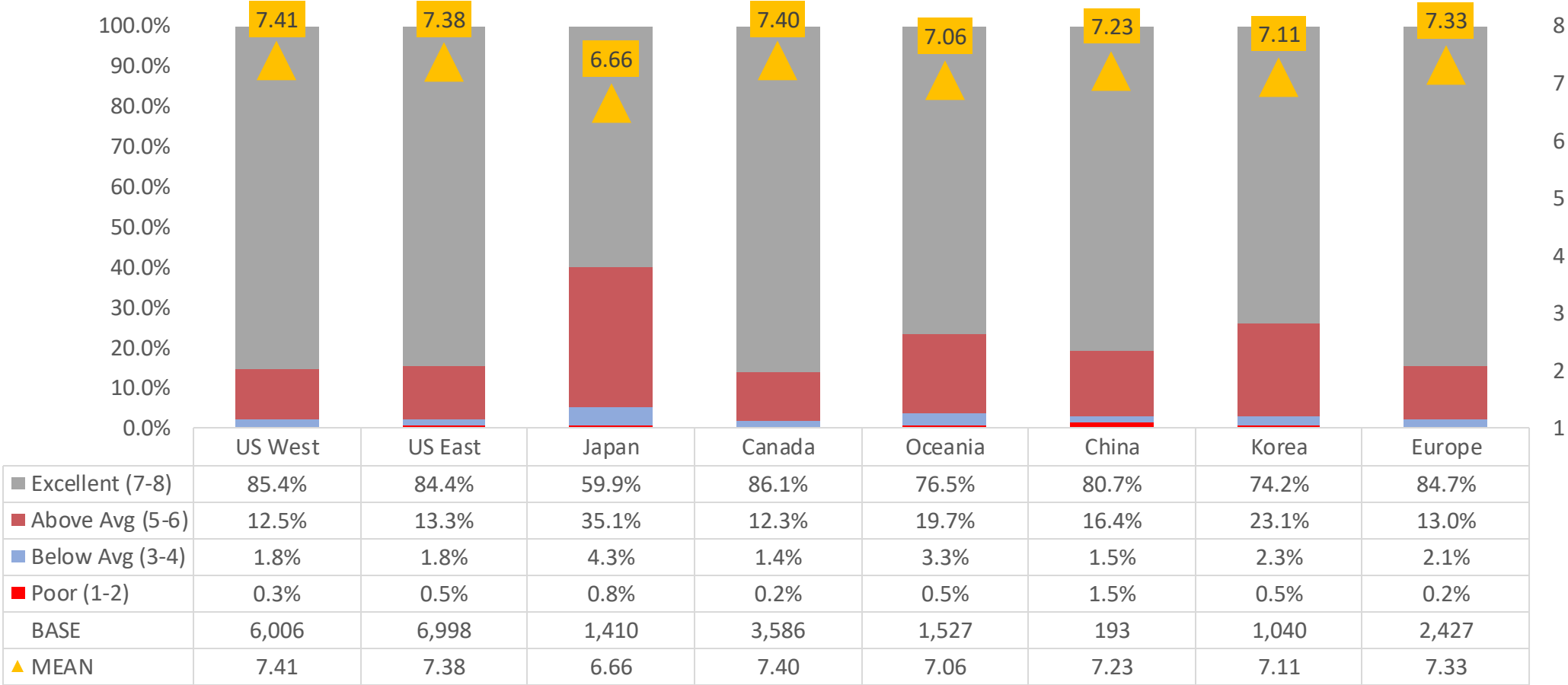


NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

- **Age:** When evaluating their stay based on the number of different and unique travel experiences, younger visitors under the age of 35 from **U.S. West, U.S. East, Korea** and **Japan** were the most pleased.
- **Trips to Hawai'i:** First-time visitors from **U.S. West** and **Japan** gave higher satisfaction scores in this area than repeat visitors from these visitor markets.
- **Islands visited:** Visitors from **U.S. East, Canada** and **Japan** whose trip included stays on multiple islands gave higher satisfaction scores compared to visitors from these markets who stayed on a single island.
- **Gender:** Female visitors from **U.S. West** were more satisfied with the number of different and unique experiences than their male counterparts.
- **Household income:** Visitors from **U.S. West** with annual household income of less than \$100K were the most satisfied when it came to rating their satisfaction with the number of different and unique experiences offered.
- **Travel party size:** Those who traveled by themselves from **U.S. East** and **Japan** gave lower satisfaction scores for the number of different and unique experiences offered.

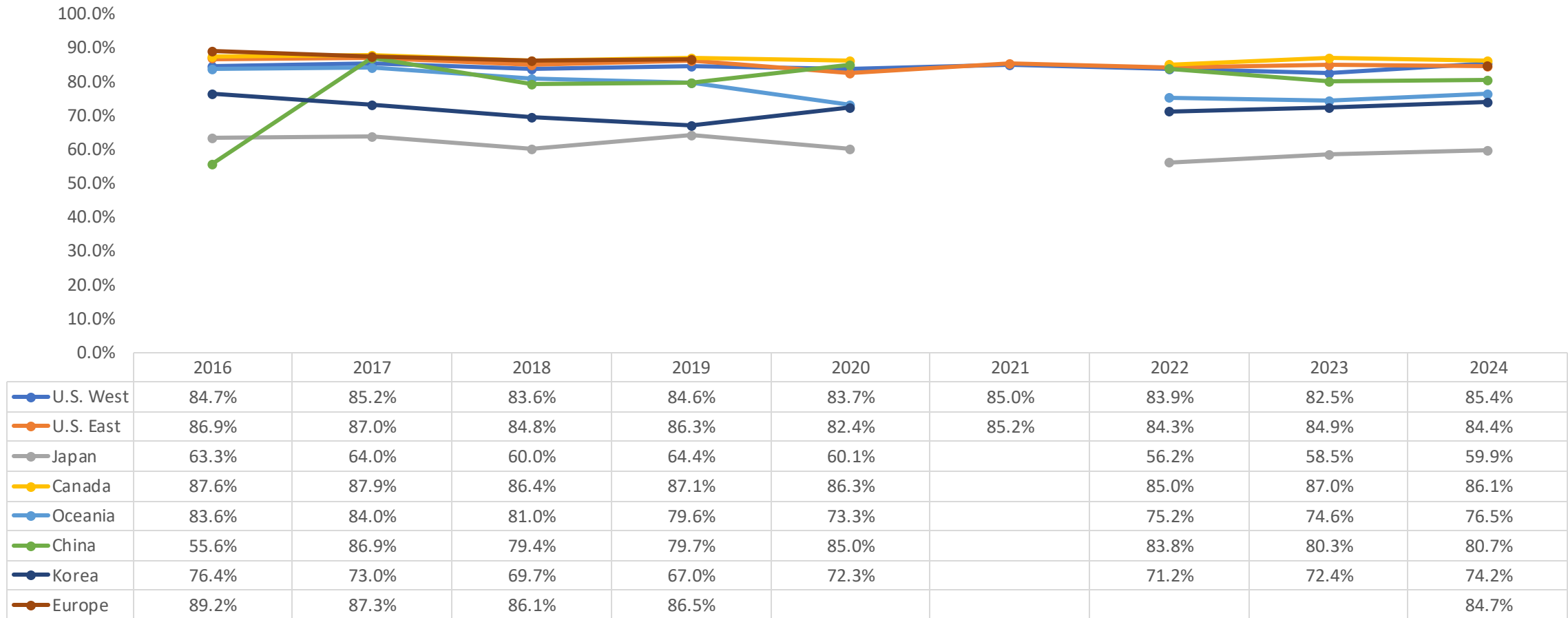
SAFE AND SECURE DESTINATION

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



SAFE AND SECURE DESTINATION

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



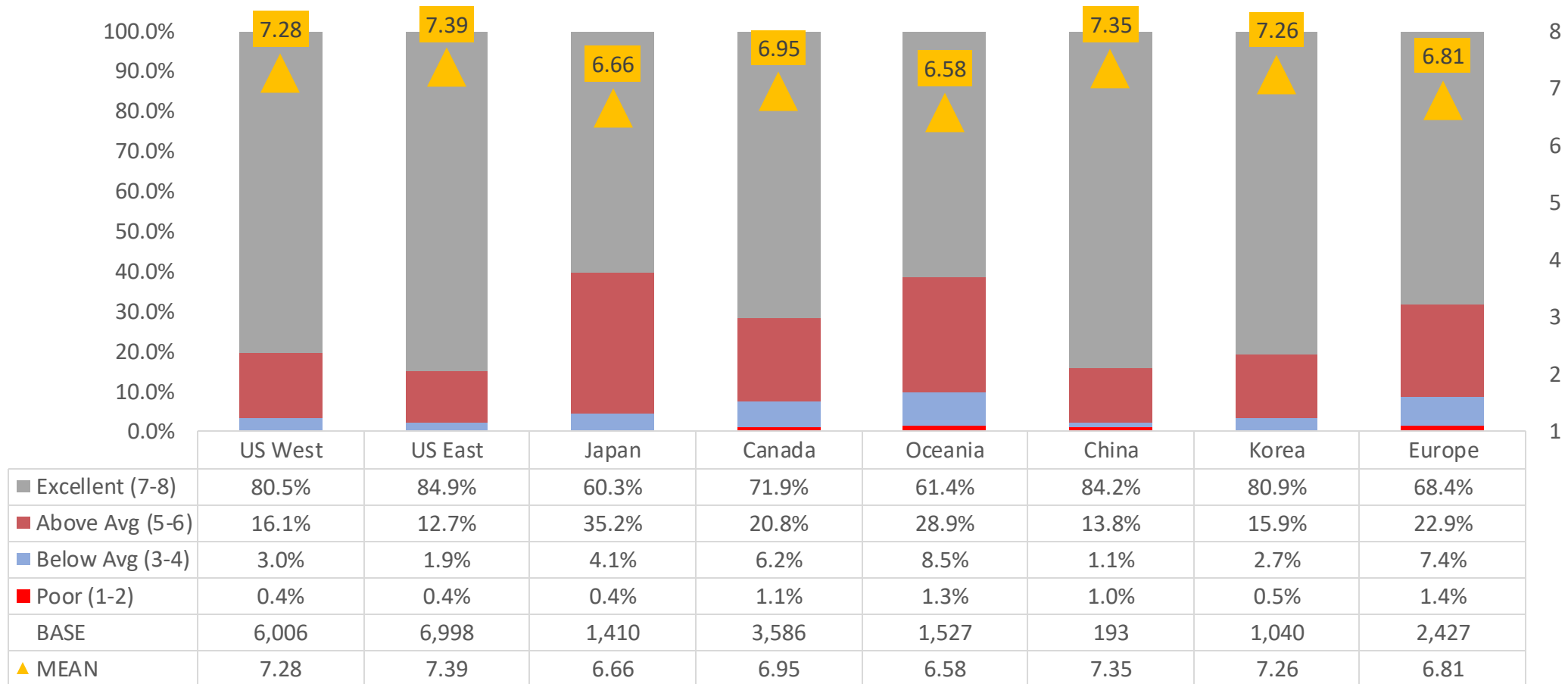
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

SAFE AND SECURE DESTINATION

- ***Trips to Hawai'i:*** First-time visitors from **U.S. West** and **Japan** gave higher satisfaction scores than repeat visitors when rating safety and security.
- ***Gender:*** Female visitors from **U.S. West** and **U.S. East** were more satisfied when asked if they felt safe and secure during their stay compared to male visitors from these visitor markets.
- ***Travel party size:*** Visitors traveling by themselves from **U.S. West** and **U.S. East** were the least satisfied with their stay when rating safety and security compared to those traveling with at least one other individual.
- ***Household income:*** Visitors from **U.S. West** with an annual household income of less than \$100K were the most satisfied when rating safety and security.

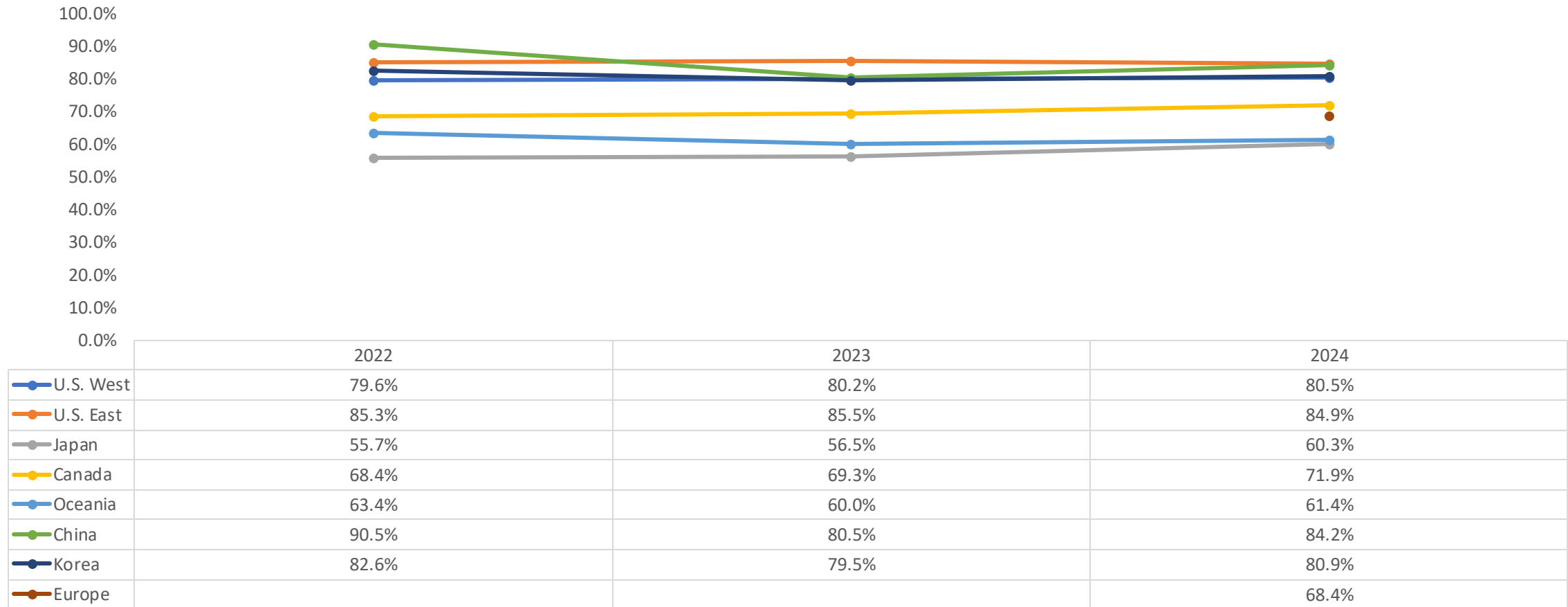
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



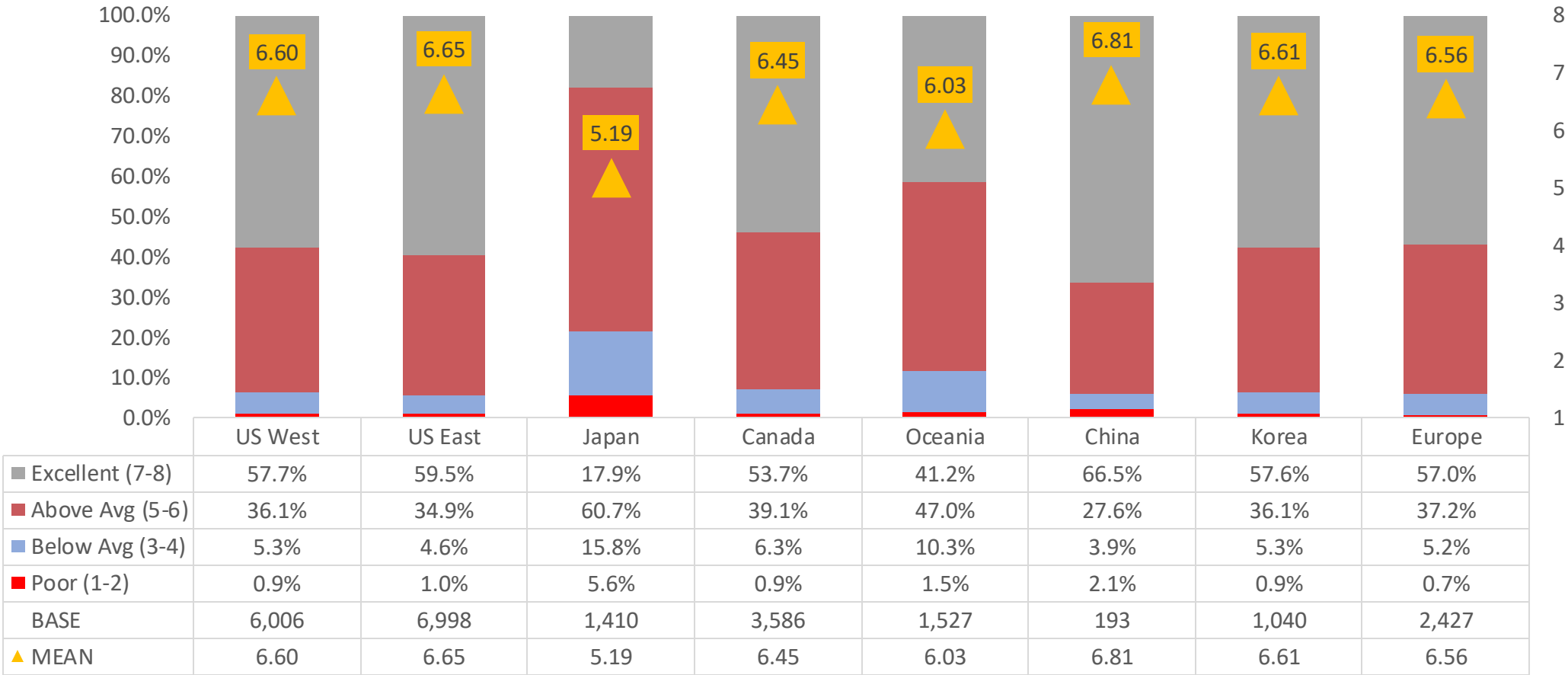
Visitors from Europe were not surveyed in 2021 through 2023.

ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

- ***Trips to Hawai'i:*** First-time visitors from **U.S. West, U.S. East, Canada** and **Japan** gave higher satisfaction scores for the state being environmentally friendly and sustainable compared to repeat visitors from these markets.
- ***Islands visited:*** Those visitors from **Canada** whose trip included stays on multiple islands gave higher satisfaction scores.
- ***Gender:*** Female visitors from **U.S. East** were more satisfied when rating the state on being environmentally friendly and sustainable than their male counterparts.
- ***Education:*** Among visitors from **U.S. West, U.S. East** and **Oceania**, those without a college degree were more satisfied in this area than those with a college degree.
- ***Travel party size:*** Visitors from **U.S. West** and **U.S. East** in larger travel parties (2+ individuals) were more satisfied with the state being environmentally friendly and sustainable compared to those who traveled alone.
- ***Household income:*** Less affluent visitors from **U.S. West** with an annual household income below \$100K were more satisfied than affluent visitors from this market.

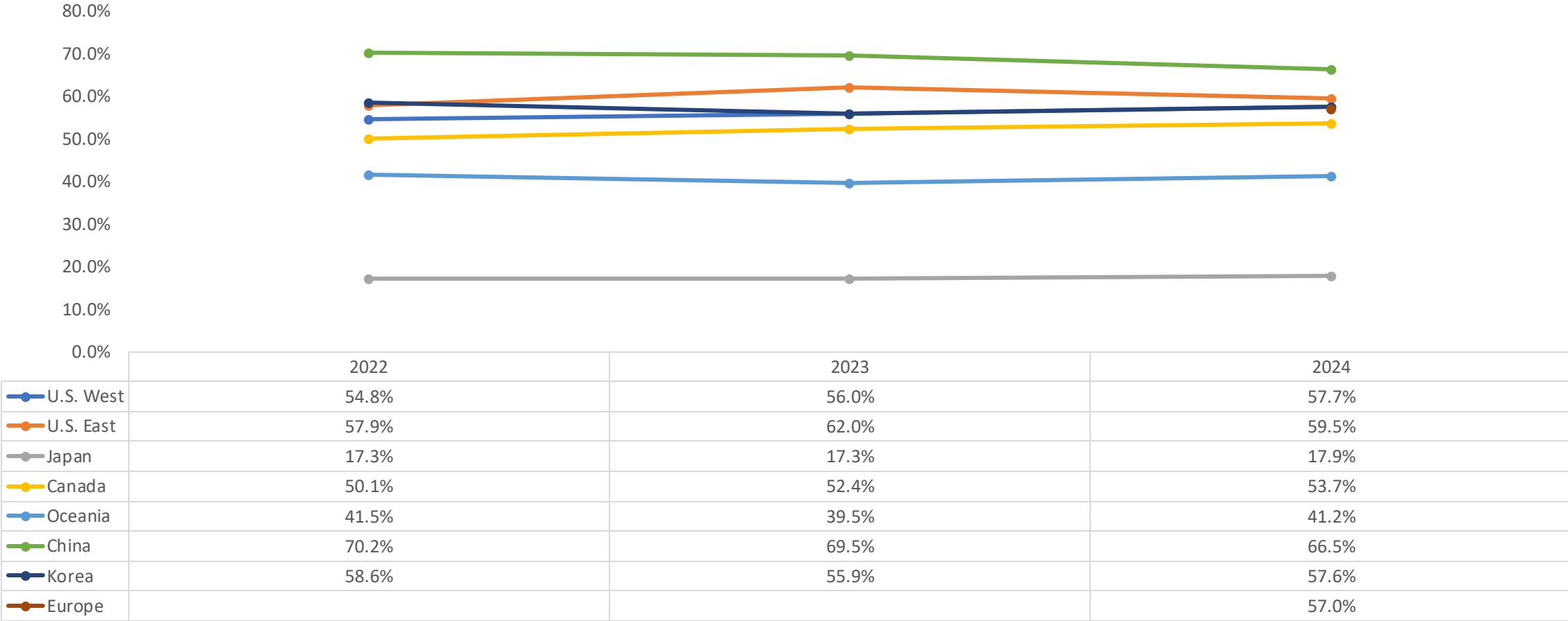
VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Visitors from Europe were not surveyed in 2021 through 2023.



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

- **Age:** When evaluating their stay based on whether they felt there were opportunities to volunteer and give-back, visitors between the ages of 35 to 49 from **U.S. West** were the most pleased compared to older visitors from this market. Younger visitors from **Japan** under the age of 35 were more satisfied in this area compared to older travelers from this market.
- **Trips to Hawai'i:** First-time visitors from **U.S. West, U.S. East** and **Canada** gave higher satisfaction scores when asked about volunteer opportunities compared to repeat visitors from these markets.
- **Gender:** Female visitors from **U.S. West** and **Japan** were more satisfied with the opportunities to volunteer and give-back during their stay than their male counterparts.
- **College graduate:** Among visitors from **U.S. West, U.S. East,** and **Oceania,** those without a college degree were more satisfied in this area than those with a college degree from these markets.
- **Household income:** Less affluent visitors (<\$100K) from **U.S. West** gave higher marks to the state for volunteer and give-back opportunities.

Section 6 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	97.2%	98.6%	97.4%	98.2%	92.8%	99.1%	99.3%	98.6%
On own (self-guided)/ driving around the island	84.3%	81.3%	73.0%	84.0%	48.2%	81.8%	73.5%	75.3%
Helicopter ride/ airplane tour	2.8%	6.1%	0.5%	4.1%	3.4%	4.8%	4.6%	12.1%
Boat tour/ submarine ride/ whale watching	24.1%	31.1%	8.6%	23.6%	18.1%	31.5%	31.3%	24.5%
Visiting towns/ communities	53.5%	54.7%	37.1%	57.1%	28.1%	37.4%	29.0%	44.8%
Private limousine/ van tour/ tour bus	6.9%	14.6%	14.5%	10.1%	30.7%	12.1%	11.9%	16.1%
Scenic views/ natural landmarks	59.0%	68.4%	22.5%	66.0%	50.9%	62.0%	71.4%	64.8%
Movie and TV filming location tours	4.8%	6.9%	5.6%	6.4%	8.8%	23.2%	13.2%	10.1%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.1%	95.9%	95.7%	98.0%	92.3%	98.0%	97.4%	96.0%
Beach/ sunbathing	85.0%	82.7%	74.5%	87.8%	76.0%	85.2%	83.0%	84.3%
Bodyboarding	9.6%	6.0%	0.9%	11.4%	3.5%	3.7%	5.0%	6.3%
Stand-up paddle boarding	4.1%	3.8%	2.5%	3.4%	2.8%	4.1%	3.9%	3.6%
Surfing	5.9%	5.9%	2.9%	8.1%	7.6%	11.7%	7.0%	12.8%
Canoe paddling	1.3%	1.3%	0.5%	2.2%	0.8%	3.1%	1.6%	2.0%
Kayaking	4.3%	4.5%	1.0%	4.0%	1.3%	4.3%	5.0%	3.4%
Swimming in the ocean	63.0%	60.1%	38.1%	70.0%	60.4%	52.9%	41.9%	67.7%
Snorkeling	41.3%	37.6%	11.9%	45.2%	23.3%	53.1%	34.7%	41.7%
Freediving	1.7%	1.0%	0.3%	1.4%	0.8%	1.3%	6.4%	1.7%
Windsurfing/ kitesurfing	0.3%	0.1%	0.1%	0.3%	0.2%	0.7%	1.1%	0.8%
Jet skiing/ parasailing	1.5%	1.5%	2.6%	1.0%	0.6%	1.9%	2.6%	0.7%
Scuba diving	2.3%	1.9%	1.1%	2.5%	0.6%	1.0%	2.6%	2.7%
Fishing	2.4%	2.8%	0.6%	1.7%	0.9%	0.7%	5.0%	0.9%
Golf	7.0%	5.9%	4.9%	7.3%	2.3%	5.8%	1.2%	2.6%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.1%	95.9%	95.7%	98.0%	92.3%	98.0%	97.4%	96.0%
Running/ jogging/ fitness/ walking	30.0%	28.5%	26.7%	32.7%	24.4%	19.3%	21.0%	20.7%
Cycling	2.6%	2.4%	3.3%	4.2%	1.5%	2.0%	3.5%	4.1%
Spa	7.6%	8.3%	3.9%	4.9%	5.8%	6.6%	1.6%	4.4%
Hiking	40.6%	46.1%	22.1%	45.9%	18.5%	24.2%	52.1%	47.0%
Backpacking/ camping	1.0%	1.5%	0.2%	1.7%	0.3%	1.5%	4.2%	2.5%
Agritourism	12.2%	14.5%	8.4%	11.1%	5.8%	18.6%	11.9%	9.7%
Sports event or tournament	2.0%	1.9%	1.4%	2.8%	1.6%	1.1%	0.7%	3.1%
Parks/ botanical gardens	34.6%	41.6%	24.8%	39.4%	27.8%	25.2%	31.3%	39.7%
Waterparks	1.8%	1.3%	2.2%	1.4%	1.1%	2.8%	4.6%	1.2%
Mountain tubing/ waterfall rappel	2.4%	2.3%	0.4%	1.9%	0.5%	0.9%	3.9%	3.6%
Zip-lining	4.1%	4.2%	0.6%	2.1%	1.1%	0.8%	3.2%	1.7%
Skydiving	0.2%	0.5%	1.2%	0.5%	0.0%	1.4%	4.5%	0.5%
All-terrain vehicle (ATV)	2.8%	4.3%	1.3%	2.7%	3.1%	9.5%	3.4%	2.8%
Horseback riding	0.9%	1.7%	2.3%	0.9%	0.6%	0.8%	5.9%	1.4%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	97.9%	97.2%	98.2%	97.7%	97.6%	99.0%	97.8%	97.1%
Lunch/ sunset/ dinner/ evening cruise	21.4%	25.7%	13.5%	21.9%	16.9%	34.4%	52.8%	27.1%
Live music/ stage show	27.9%	32.4%	18.2%	28.2%	21.6%	16.3%	18.0%	26.9%
Nightclub/ dancing/ bar/ karaoke	7.1%	6.6%	2.4%	6.3%	5.9%	2.8%	2.2%	6.5%
Fine dining	45.2%	45.6%	35.9%	38.7%	29.9%	49.9%	36.5%	27.4%
Family restaurant	62.5%	58.0%	26.3%	61.2%	65.2%	44.0%	22.5%	45.5%
Fast food	31.2%	32.1%	53.3%	40.5%	52.0%	57.9%	48.4%	43.6%
Food truck	45.0%	43.4%	26.6%	45.4%	34.2%	61.7%	33.7%	46.2%
Café/ coffee house	53.1%	49.7%	57.7%	56.9%	61.0%	65.6%	47.7%	55.3%
Ethnic dining	25.8%	29.5%	7.6%	21.3%	13.3%	26.1%	21.2%	13.0%
Farm-to-table cuisine	18.0%	18.8%	16.4%	13.2%	3.5%	2.9%	4.1%	8.4%
Prepared own meal	45.7%	36.8%	29.4%	56.9%	24.7%	17.5%	16.1%	39.1%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	95.6%	95.0%	97.8%	96.7%	95.1%	97.4%	94.2%	94.9%
Malls/ department stores	43.6%	42.3%	83.2%	55.4%	71.8%	79.9%	58.9%	56.3%
Designer boutiques	16.7%	18.3%	15.6%	16.9%	14.6%	4.3%	9.3%	12.2%
Hotel/ resort stores	33.8%	37.8%	33.5%	30.2%	32.7%	33.2%	24.7%	25.4%
Swap meet/ flea market	17.1%	14.7%	3.4%	15.5%	7.3%	3.6%	3.8%	6.4%
Discount/ outlet stores	12.3%	12.7%	26.7%	14.9%	32.7%	57.0%	8.5%	13.9%
Supermarkets	58.8%	51.0%	60.3%	63.5%	46.0%	48.0%	51.9%	63.6%
Farmer's market	37.6%	32.2%	21.3%	41.6%	17.3%	10.2%	21.8%	35.3%
Convenience stores	50.2%	49.3%	56.2%	52.5%	67.1%	57.6%	49.0%	38.2%
Duty-free stores	4.8%	4.8%	21.4%	6.7%	12.8%	35.9%	21.8%	7.5%
Hawai'i-made products	46.0%	49.4%	20.8%	45.4%	32.8%	29.4%	35.7%	44.5%
Local shops and artisans	54.8%	57.7%	12.5%	56.3%	39.8%	19.7%	27.4%	47.0%
Local fashion designers	7.5%	7.5%	3.2%	9.3%	8.4%	1.2%	5.8%	11.1%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	66.9%	76.3%	55.8%	72.1%	73.0%	65.5%	75.6%	74.1%
Historic military sites and museums	18.8%	29.8%	11.8%	19.2%	45.1%	22.3%	34.7%	34.9%
Historic Hawaiian sites and museums	30.4%	36.4%	16.3%	33.9%	25.6%	12.0%	29.0%	34.3%
Other historical sites, museums, and homes	13.3%	15.8%	6.8%	13.7%	10.9%	19.3%	15.6%	15.1%
Art museums	3.1%	2.8%	2.6%	2.6%	2.9%	4.9%	6.7%	3.5%
Art galleries and exhibitions	7.9%	8.3%	4.2%	9.4%	6.5%	2.2%	3.0%	7.0%
Lū'au/ Polynesian show/ hula show	25.0%	37.1%	16.6%	27.7%	23.4%	22.6%	15.8%	28.0%
Lesson- e.g. ukulele, hula, canoe, lei making	5.3%	6.4%	6.2%	5.6%	4.2%	5.4%	7.5%	5.3%
Play/ concert/ theatre	3.0%	2.5%	3.0%	3.2%	2.2%	3.2%	3.3%	3.0%
Art/ craft fair	11.4%	10.6%	3.2%	12.1%	5.5%	4.2%	7.4%	5.0%
Festival/ event	5.3%	4.8%	5.0%	5.9%	6.3%	4.1%	0.7%	4.4%

ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	91.8%	91.0%	96.7%	94.7%	96.2%	96.9%	92.9%	93.5%
Airport shuttle	12.1%	14.1%	20.8%	14.6%	28.6%	11.1%	13.9%	15.7%
Trolley	1.8%	2.5%	48.4%	3.3%	14.2%	21.6%	2.9%	3.9%
Public bus	4.4%	4.8%	26.3%	9.3%	24.5%	11.9%	17.0%	17.9%
Tour bus/ tour van	7.1%	14.4%	18.6%	11.3%	30.0%	26.1%	10.0%	15.5%
Taxi/ limo	6.0%	8.2%	29.6%	11.5%	33.2%	22.6%	11.6%	17.0%
Rental car	72.1%	68.1%	26.8%	71.3%	28.0%	56.5%	51.2%	61.0%
Ride share	19.6%	21.9%	23.7%	21.2%	44.5%	25.4%	35.3%	23.9%
Car share	4.6%	3.9%	1.2%	5.0%	3.2%	3.3%	2.9%	2.5%
Bicycle rental	1.9%	1.9%	3.6%	2.3%	1.5%	1.2%	3.1%	2.4%

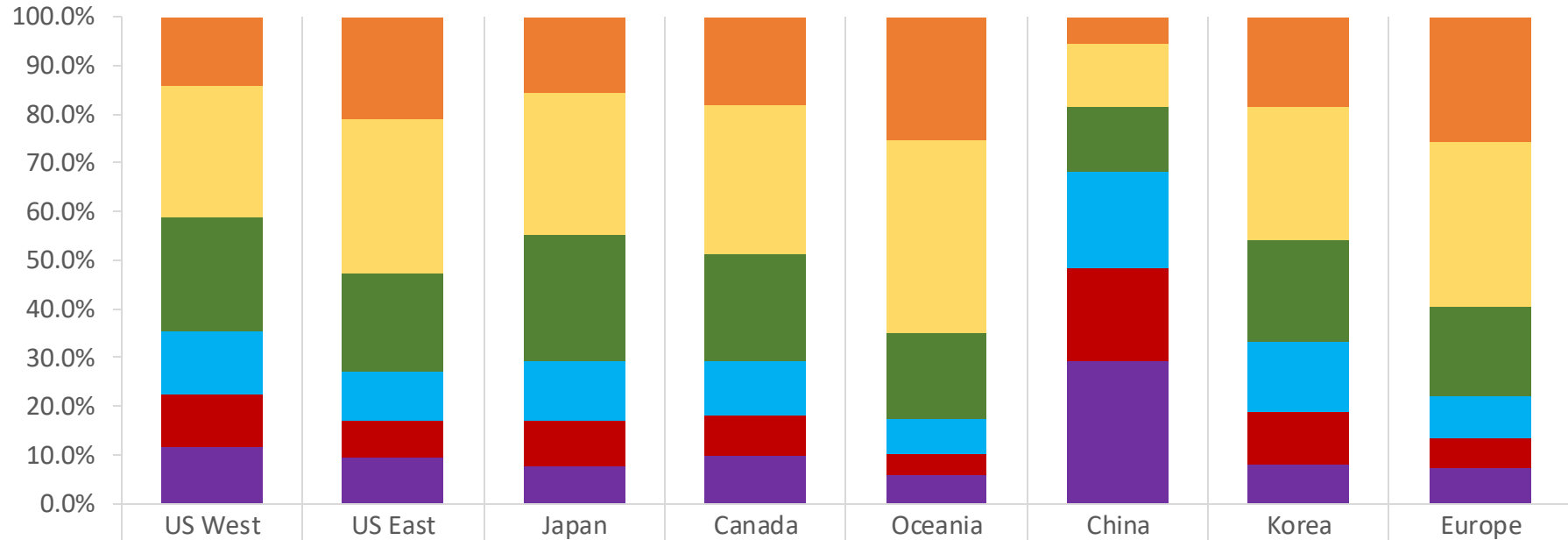
ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	31.3%	29.6%	16.6%	22.3%	11.8%	22.8%	16.7%	17.4%
Visiting friends/ relatives	29.7%	27.8%	15.0%	20.3%	10.6%	21.6%	15.5%	14.3%
Giving back to the local community	2.6%	2.7%	1.8%	2.7%	1.4%	1.7%	2.4%	3.7%

Section 7 – Travel Planning

TRAVEL PLANNING

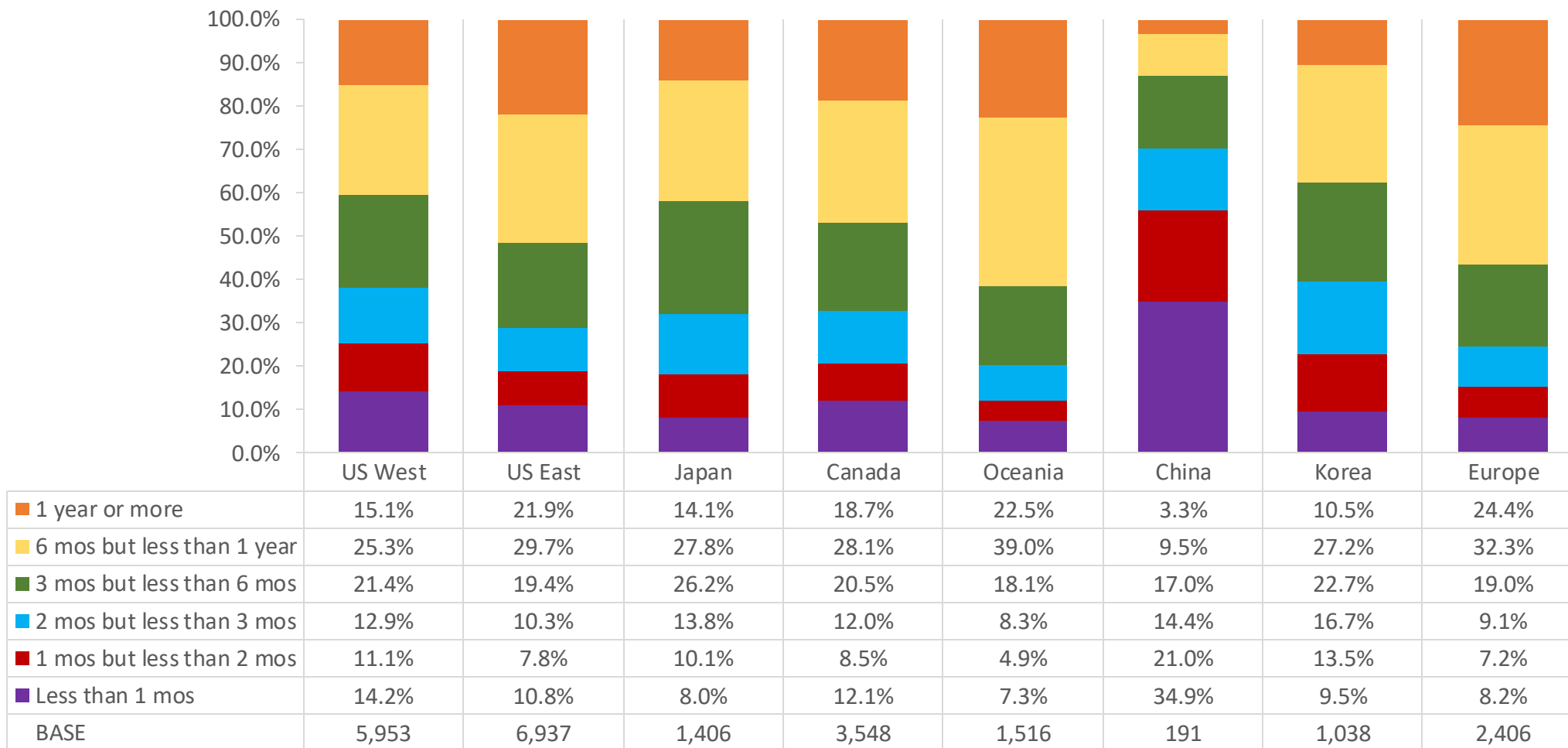
Decision to take vacation/ pleasure trip



	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
1 year or more	14.2%	21.0%	15.5%	18.3%	25.4%	5.4%	18.6%	25.6%
6 mos but less than 1 year	27.2%	31.5%	29.2%	30.4%	39.6%	13.3%	27.3%	33.8%
3 mos but less than 6 mos	23.2%	20.5%	26.0%	21.8%	17.5%	13.3%	20.8%	18.6%
2 mos but less than 3 mos	13.1%	10.0%	12.4%	11.4%	7.4%	19.6%	14.6%	8.7%
1 mos but less than 2 mos	10.6%	7.8%	9.4%	8.2%	4.2%	19.3%	10.9%	6.0%
Less than 1 mos	11.8%	9.3%	7.5%	9.8%	5.9%	29.2%	7.8%	7.3%
BASE	5,953	6,937	1,406	3,548	1,516	191	1,038	2,406

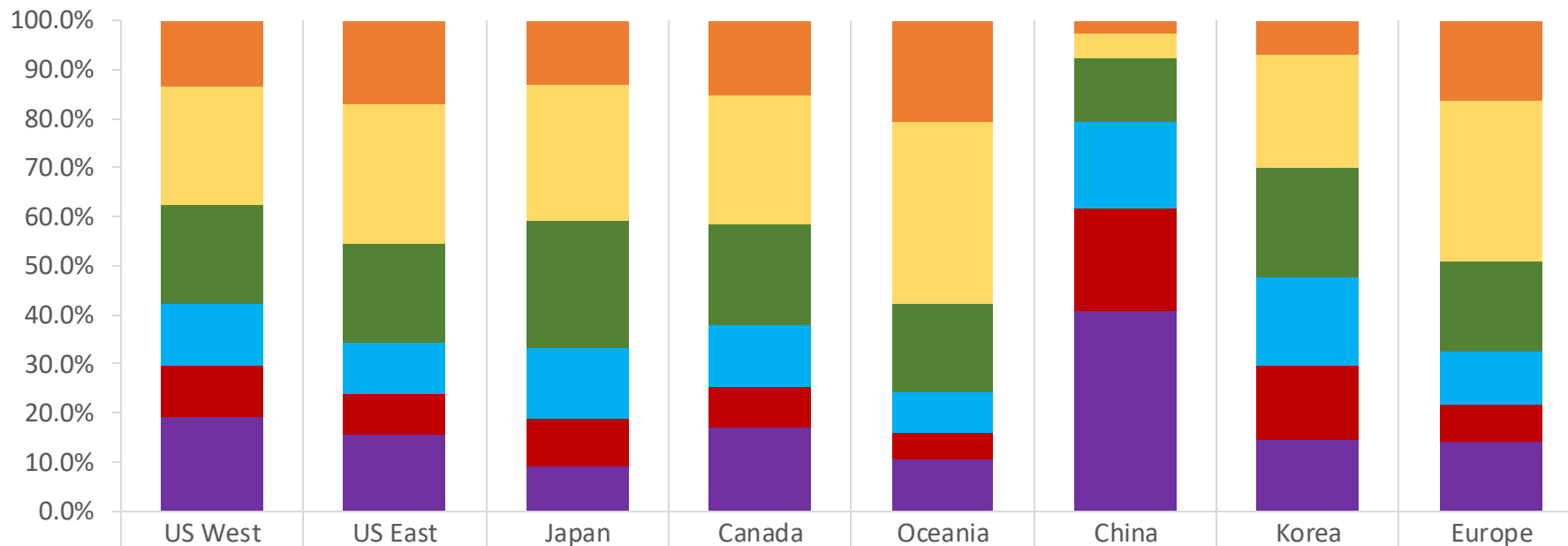
TRAVEL PLANNING

Decision to visit Hawai'i



TRAVEL PLANNING

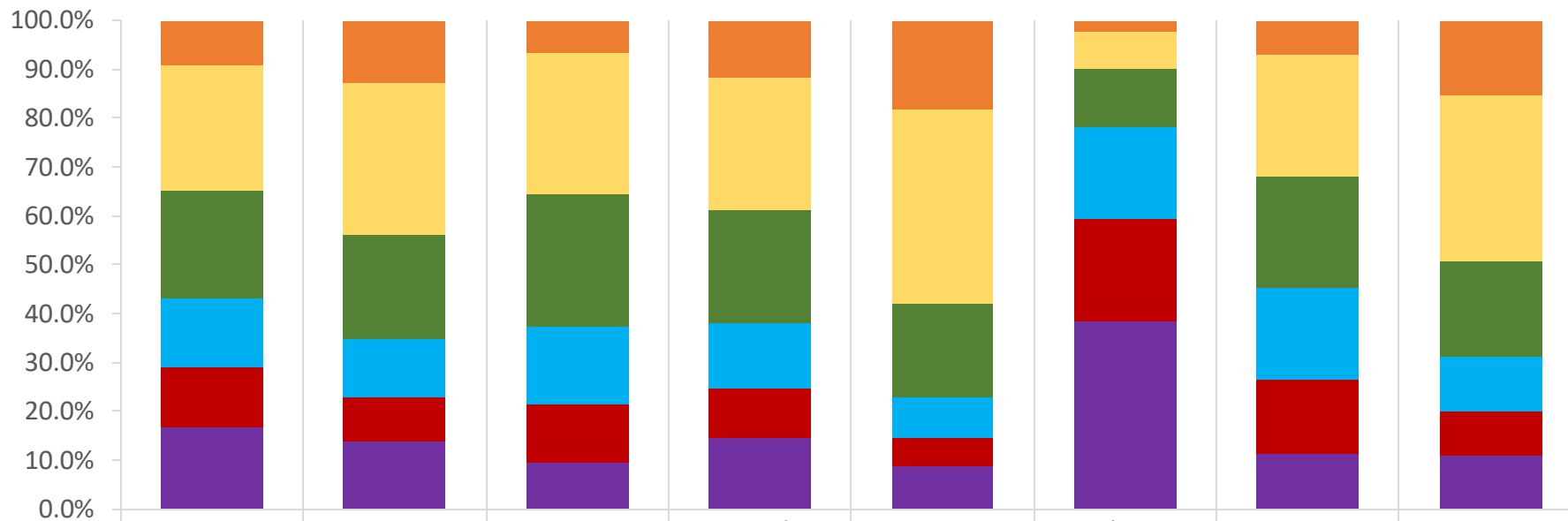
Decision on which island(s) to visit



	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
1 year or more	13.6%	16.9%	13.1%	15.2%	20.7%	2.7%	7.0%	16.3%
6 mos but less than 1 year	23.9%	28.7%	27.6%	26.2%	37.2%	5.0%	22.9%	32.7%
3 mos but less than 6 mos	20.5%	19.9%	26.2%	20.8%	18.0%	12.8%	22.3%	18.7%
2 mos but less than 3 mos	12.3%	10.6%	14.3%	12.5%	8.3%	17.7%	17.9%	10.6%
1 mos but less than 2 mos	10.5%	8.1%	9.9%	8.4%	5.1%	21.1%	15.3%	7.6%
Less than 1 mos	19.2%	15.7%	9.0%	16.9%	10.6%	40.7%	14.4%	14.2%
BASE	5,953	6,937	1,406	3,548	1,516	191	1,038	2,406

TRAVEL PLANNING

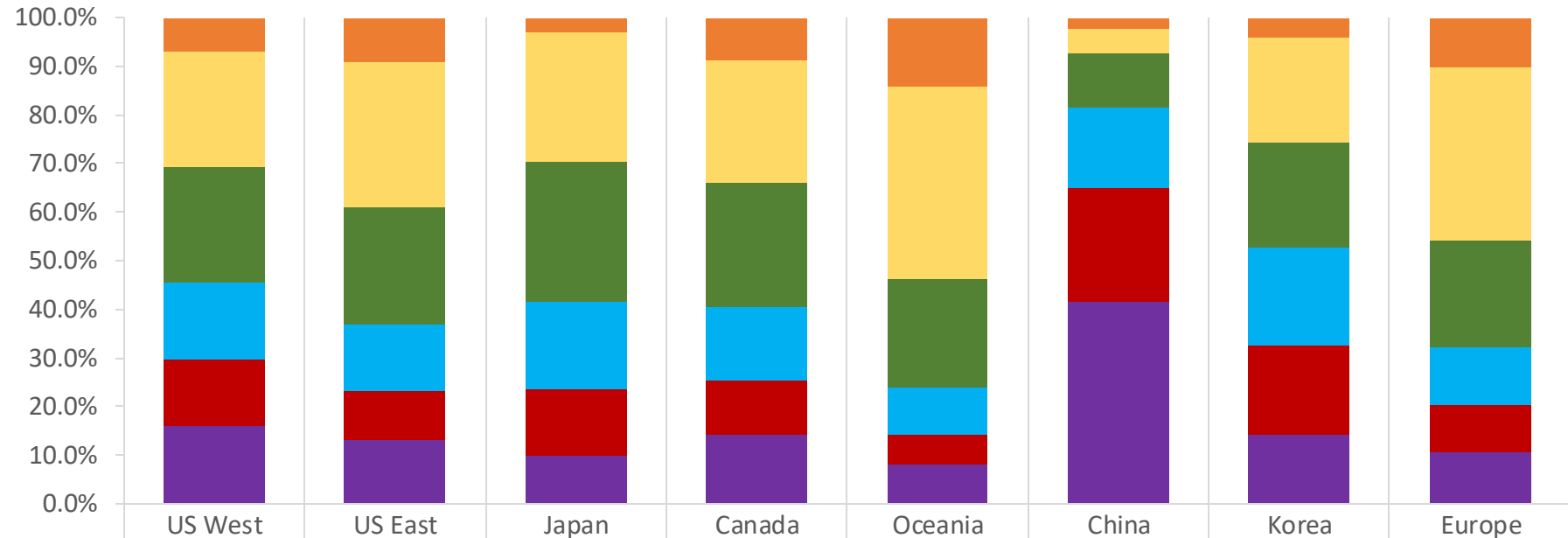
Determining the dates of your trip



	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
1 year or more	9.2%	12.9%	6.7%	11.8%	18.3%	2.2%	7.1%	15.2%
6 mos but less than 1 year	25.6%	30.8%	28.8%	27.0%	39.7%	7.6%	25.0%	34.1%
3 mos but less than 6 mos	22.0%	21.5%	27.1%	23.1%	19.1%	12.1%	22.5%	19.4%
2 mos but less than 3 mos	14.4%	12.0%	16.1%	13.6%	8.5%	18.8%	18.8%	11.2%
1 mos but less than 2 mos	12.1%	8.7%	11.6%	10.0%	5.7%	21.0%	15.1%	9.0%
Less than 1 mos	16.8%	13.9%	9.6%	14.7%	8.6%	38.4%	11.4%	11.0%
BASE	5,953	6,937	1,406	3,548	1,516	191	1,038	2,406

TRAVEL PLANNING

Begin booking your trip



	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
1 year or more	6.8%	9.0%	3.1%	8.7%	14.3%	2.2%	4.0%	10.3%
6 mos but less than 1 year	23.9%	30.0%	26.5%	25.3%	39.5%	5.0%	21.5%	35.6%
3 mos but less than 6 mos	23.9%	24.3%	28.7%	25.5%	22.2%	11.3%	21.7%	21.8%
2 mos but less than 3 mos	15.8%	13.5%	18.0%	15.3%	9.9%	16.6%	20.4%	12.1%
1 mos but less than 2 mos	13.6%	10.0%	14.0%	11.1%	6.1%	23.3%	18.1%	9.5%
Less than 1 mos	16.0%	13.1%	9.7%	14.1%	8.0%	41.6%	14.3%	10.7%
BASE	5,953	6,937	1,406	3,548	1,516	191	1,038	2,406

TRAVEL PLANNING Segmentation

- **Age:** Younger travelers from **U.S. West** and **U.S. East** had a shorter travel planning window.
- **Islands visited:** Among visitors from **U.S. West** and **U.S. East**, those who visited multiple islands during their trip planned over longer periods of time compared to those whose trip consisted of visiting a single island. **Canadian** visitors who stayed on just a single island had shorter planning windows.
- **Trips to Hawai'i:** First-time visitors from **Korea** had longer planning windows while repeat visitors from **Japan** had longer planning windows as well.
- **Household income:** Among **U.S. West** and **U.S. East** visitors, less affluent (<\$100K) respondents had shorter planning windows.
- **Travel party size:** Among visitors from **U.S. West**, **U.S. East**, **Oceania**, **Korea**, **Japan** and **Canada**, the travel planning window grew longer as travel party size increased.

TRAVEL PLANNING

Sources of Information

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Personal experience	48.5%	36.4%	37.6%	39.8%	33.3%	30.8%	20.1%	21.3%
Recommendations from friends/ family	31.8%	35.2%	16.7%	33.2%	26.7%	30.6%	17.3%	25.8%
Online travel booking site	21.2%	21.5%	14.4%	32.3%	27.6%	32.8%	17.3%	31.9%
Travel information website	16.0%	23.0%	9.7%	23.4%	26.5%	18.0%	12.5%	29.8%
Social media	13.7%	17.8%	33.4%	18.5%	16.5%	54.3%	33.1%	21.6%
Information direct from airline/ commercial carrier	13.8%	13.3%	11.6%	11.4%	8.8%	3.1%	2.3%	10.3%
Travel agents/ companies specializing in packaged tours	7.6%	13.7%	31.6%	12.4%	38.9%	12.3%	33.3%	27.9%
Travel blogs	9.6%	13.5%	16.7%	15.9%	7.8%	10.4%	35.4%	21.6%
Smartphone/ tablet app	11.9%	12.2%	8.3%	10.5%	9.3%	11.8%	23.2%	13.6%
Information direct from hotel/ resorts	11.3%	14.6%	7.8%	11.1%	8.9%	5.7%	2.0%	8.4%
Guidebooks	6.1%	9.9%	24.4%	9.7%	4.6%	12.0%	6.1%	20.3%
Hawai'i Destination website	7.1%	11.3%	8.1%	12.5%	10.2%	13.9%	3.4%	16.7%
Magazine/ newspaper article	1.7%	2.5%	4.8%	1.8%	1.3%	1.5%	0.7%	3.3%
Television	0.9%	1.7%	5.0%	1.7%	1.0%	1.0%	6.4%	1.6%

TRAVEL PLANNING - U.S. WEST

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on recommendations from others, online travel booking sites, travel information websites, social media, mobile apps, travel blogs, travel agents and the Hawai'i Destination website. Repeat visitors relied more on personal experience, information from the airline and information from the hotel.
- ***Age:*** Younger visitors under 50 were more likely to use recommendations from others, online travel booking sites, travel information sites, social media, mobile apps and travel blogs.
- ***Gender:*** Males were more likely to rely on personal experience while females used recommendations from others, social media, mobile apps and the Hawai'i Destination website in higher numbers.
- ***Household income:*** Less affluent travelers (<\$100K) were more likely to rely on recommendations from others, online booking sites and travel agents. Conversely, more affluent travelers (\$100K+) relied more on personal experience, travel information websites, information from the airline, information from the resort, travel blogs, the Hawai'i Destination website and guidebooks.

TRAVEL PLANNING - U.S. EAST

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on recommendations from others, online travel booking sites, travel information websites, social media, mobile apps, travel blogs, travel agents and the Hawai'i destination website. Repeat visitors relied more on personal experience and information from the airline.
- ***Age:*** Younger visitors under 50 were more likely to use recommendations from others, online travel booking, travel information sites, social media, mobile apps and travel blogs.
- ***Gender:*** Male visitors were more likely to rely on personal experience while female visitors used recommendations from others, social media and mobile apps in higher numbers.
- ***Household income:*** More affluent travelers (\$150K+) relied more on personal experience, recommendations from others, travel information websites, information from the airline, information from the resort, travel blogs, Hawai'i destination website and guidebooks.

TRAVEL PLANNING - CANADA

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on recommendations from others, online travel booking sites, travel information websites, social media, travel blogs, the Hawai'i Destination website and travel agents. Repeat visitors relied more on personal experience and information from the airline.
- ***Age:*** Younger visitors under 50 were more likely to use recommendations from others, social media, travel blogs and the Hawai'i Destination website.
- ***Gender:*** Males were more likely to rely on personal experience.
- ***Household income:*** More affluent travelers (\$100K+) relied more on travel information websites.

TRAVEL PLANNING - JAPAN

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on social media, travel agents, guidebooks and recommendations from others. Repeat visitors relied more on personal experience and information from the airline and resort.
- ***Age:*** Younger visitors under 50 were more likely to use recommendations from others and social media. Young adults under 35 are the most reliant on travel agent and companies that specialize in packaged tours.
- ***Gender:*** Females were more likely to rely on social media for trip information.

TRAVEL PLANNING - OCEANIA

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on travel agents, recommendations from others, travel information websites, social media, travel blogs, and guidebooks. Repeat visitors relied more on personal experience.
- ***Age:*** Recommendations from others, social media sites and travel blogs were relied upon more heavily by travelers under 35, with usage declining with age.
- ***Islands visited:*** Those whose trip included stays on multiple islands were more likely to have consulted with the Hawai'i Destination website compared to those whose trip consisted of a stay on a single island.
- ***Education:*** College graduates from this visitor market were more likely to have relied on recommendations from others and travel blogs for guidance while those without a college degree relied more heavily on travel agents.

TRAVEL PLANNING - EUROPE

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on travel information websites, travel blogs and social media for guidance while repeat visitors relied more on personal experience.
- ***Age:*** Travel blogs and social media were relied upon more heavily by travelers under 35 with usage declining with age.
- ***Islands visited:*** Those whose trip included stays on multiple islands were more likely to have consulted with the Hawai'i Destination website, travel blogs and guidebooks compared to those whose trip consisted of a stay on a single island.
- ***Education:*** College graduates from this visitor market were more likely to have relied on travel information websites.

TRAVEL PLANNING - KOREA

Sources of Information

- ***Trips to Hawai'i:*** First-time visitors were more likely to rely on travel blogs and travel agents for guidance while repeat visitors relied more on personal experience.
- ***Education:*** College graduates from this visitor market were more likely to have relied on travel blogs and social media while those without a college degree relied more heavily on travel agents for guidance.

Section 8 – Trip Purpose

PRIMARY TRIP PURPOSE

Top Responses

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Pleasure/ vacation	71.4%	64.2%	63.4%	77.7%	81.2%	70.3%	49.9%	68.3%
Visiting friends/ relatives	11.1%	13.4%	4.2%	5.9%	4.2%	4.5%	3.4%	8.4%
Honeymoon	1.9%	2.5%	13.2%	2.2%	1.5%	4.4%	33.3%	6.0%
Other business trip/ work in Hawai'i	3.4%	4.1%	2.3%	1.5%	0.8%	4.1%	5.7%	2.2%
Anniversary/ birthday	2.4%	3.8%	0.9%	2.1%	1.1%	1.2%	0.9%	1.9%
Convention/ conference	1.9%	2.4%	0.7%	2.7%	0.8%	5.4%	2.3%	3.5%
Attend/ participate in a wedding/ vow renewal	1.6%	1.5%	1.4%	1.4%	0.6%	1.1%	0.1%	0.9%
Sports event	0.9%	1.0%	1.7%	1.9%	1.1%	0.0%	0.4%	2.0%
Government/ military business	0.6%	1.5%	0.4%	0.2%	0.4%	0.6%	0.1%	0.4%
Incentive trip	0.3%	1.1%	2.0%	1.0%	0.1%	2.9%	1.3%	1.5%
To get married	0.5%	0.6%	2.6%	0.4%	0.2%	1.1%	0.2%	0.8%
Attend funeral/ memorial service	0.8%	0.5%	0.2%	0.2%	0.1%	0.0%	0.0%	0.1%
Layover/ break up long flight	0.2%	0.2%	1.9%	0.3%	6.5%	1.9%	0.4%	0.2%

PRIMARY + SECONDARY TRIP PURPOSE

Multiple Responses

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Pleasure/ vacation	87.9%	84.3%	80.6%	92.1%	90.9%	85.0%	78.0%	87.4%
Visiting friends/ relatives	20.3%	20.8%	10.0%	12.3%	8.4%	9.3%	7.8%	12.6%
Anniversary/ birthday	5.2%	6.7%	1.3%	4.4%	1.8%	1.2%	1.8%	3.5%
Other business trip/ work in Hawai'i	5.0%	5.6%	3.3%	2.2%	1.3%	6.2%	7.9%	3.1%
Honeymoon	2.6%	3.4%	15.1%	3.0%	1.8%	7.6%	34.9%	7.4%
Convention/ conference	2.4%	3.0%	1.2%	3.5%	1.2%	6.5%	4.1%	4.0%
Attend/ participate in a wedding/ vow renewal	1.9%	2.0%	1.8%	1.6%	0.6%	1.1%	0.1%	1.2%
Incentive trip	1.2%	2.2%	4.7%	2.0%	0.6%	7.8%	4.1%	2.9%
Sports event	1.3%	1.4%	2.6%	2.4%	1.7%	0.0%	2.6%	3.1%
Government/ military Business	0.8%	2.0%	0.5%	0.2%	0.5%	0.6%	0.3%	0.5%
To get married	0.7%	0.8%	4.1%	0.6%	0.3%	1.6%	3.3%	1.2%
Attend funeral/ memorial service	1.1%	0.8%	0.2%	0.4%	0.1%	0.0%	0.0%	0.2%
Layover/ break up long flight	0.3%	0.4%	2.3%	0.7%	14.5%	1.9%	0.5%	0.8%

PURPOSE OF TRIP - SEGMENTATION

U.S. WEST

- ***Trips to Hawai'i:*** First-time visitors were more likely to be traveling to the state to celebrate a birthday or anniversary, honeymoon, participate in a wedding/ vow renewal or attend a convention or conference. Repeat visitors were here visiting friends and family in greater numbers.
- ***Age:*** Younger visitors under 35 were the most likely to be here on their honeymoon. Seniors 65+ were the most likely to be traveling to the state to visit friends and family.
- ***Gender:*** Females were more likely to visit friends and family while males were more likely to be here for business.
- ***Household income:*** Less affluent travelers (<\$100K) were more likely to be here visiting friends and family or on a honeymoon. At the opposite end, those in the upper income tier (\$150K+) were more likely to be here on a vacation.

PURPOSE OF TRIP - SEGMENTATION

U.S. EAST

- ***Trips to Hawai'i:*** First-time visitors were more likely to be traveling to the state for a vacation, to celebrate a birthday or anniversary, honeymoon or incentive trip. Repeat visitors were more likely to be here visiting family and friends or here for business.
- ***Age:*** Younger visitors under 35 were the most likely to be here on their honeymoon.
- ***Gender:*** Females were more likely to be visiting friends and family or attending or participating in a wedding or vow renewal, while males were more likely to be here for business, military affairs or here for a convention or conference.
- ***Household income:*** Less affluent travelers (<\$100K) were more likely to be here visiting friends and family. At the opposite end, those in the upper income tier (\$150K+) were more likely to be visiting for a vacation.

PURPOSE OF TRIP - SEGMENTATION CANADA

- ***Trips to Hawai'i:*** First-time visitors were more likely to be traveling to the state to celebrate a birthday or anniversary, honeymoon or incentive trip. Repeat visitors were more likely to be here visiting family and friends or here for business.
- ***Age:*** Younger visitors under 35 were the most likely to be here on a honeymoon.
- ***Household income:*** Less affluent travelers (<\$100K) were more likely to be here visiting friends and family.

PURPOSE OF TRIP - SEGMENTATION JAPAN

- ***Trips to Hawai'i:*** First-time visitors were more likely to be traveling to the state for their honeymoon, incentive trips, to get married and/or for business. Repeat visitors were more likely to be traveling for vacation, visiting friends and family and/or attending a sporting event.
- ***Gender:*** Females were more likely to be visiting friends and family.
- ***Age:*** Younger visitors under 35 were more likely to be here on a honeymoon. Older respondents over 35 were more likely to be here on a vacation.
- ***Education:*** College graduates were more likely to be here on their honeymoon. Those without a college degree were more likely to be here for vacation, for an incentive trip or for an anniversary/birthday.

PURPOSE OF TRIP - SEGMENTATION OCEANIA

- **Education:** College graduates were more likely to be visiting friends and family compared to those without a college degree from this visitor market.
- **Age:** Seniors 65+ were the most likely to be in the state on a layover to break up a long flight.
- **Travel party size:** Those who were here in smaller travel parties of one or two individuals were the most likely to be here on a layover to break up a longer flight. Those in larger travel parties of at least one other individual were more likely to be here on vacation compared to those traveling alone.

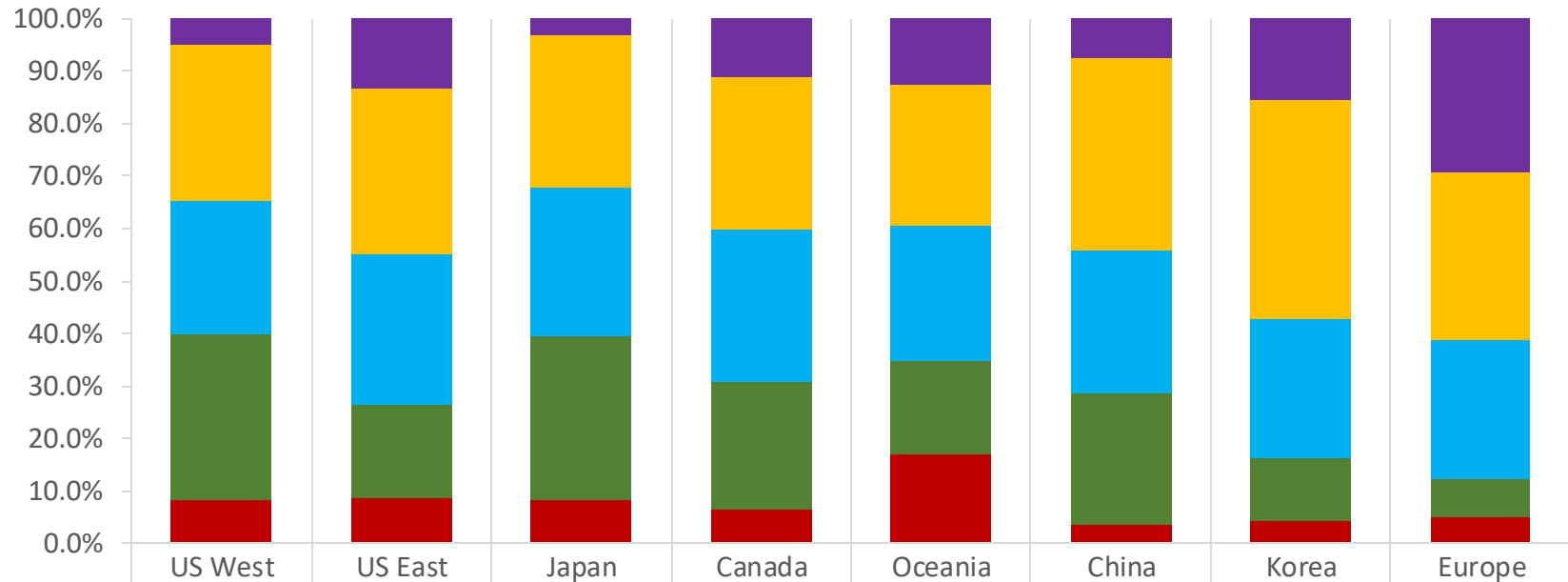
PURPOSE OF TRIP - SEGMENTATION EUROPE

- ***Trips to Hawai'i:*** Repeat visitors were more likely to be here to see friends and family.
- ***Age:*** Younger visitors under 35 were the most likely to be here on their honeymoon.
- ***Travel party size:*** Those traveling here alone were more likely to be visiting family and friends while those in larger travel parties of three or more were here on a vacation in greater numbers.

PURPOSE OF TRIP - SEGMENTATION KOREA

- ***Trips to Hawai'i:*** Repeat visitors were more likely to be here to see friends and family or for business. Half of the first-time visitors from this market were here for their honeymoon.
- ***Age:*** Younger visitors under 35 were the most likely to be here for their honeymoon.
- ***Travel party size:*** Those traveling here alone were more likely to be visiting family and friends or here for business while those in larger travel parties of three or more were here for a vacation or for an incentive trip in greater numbers.

VACATION TRIP DESCRIPTION



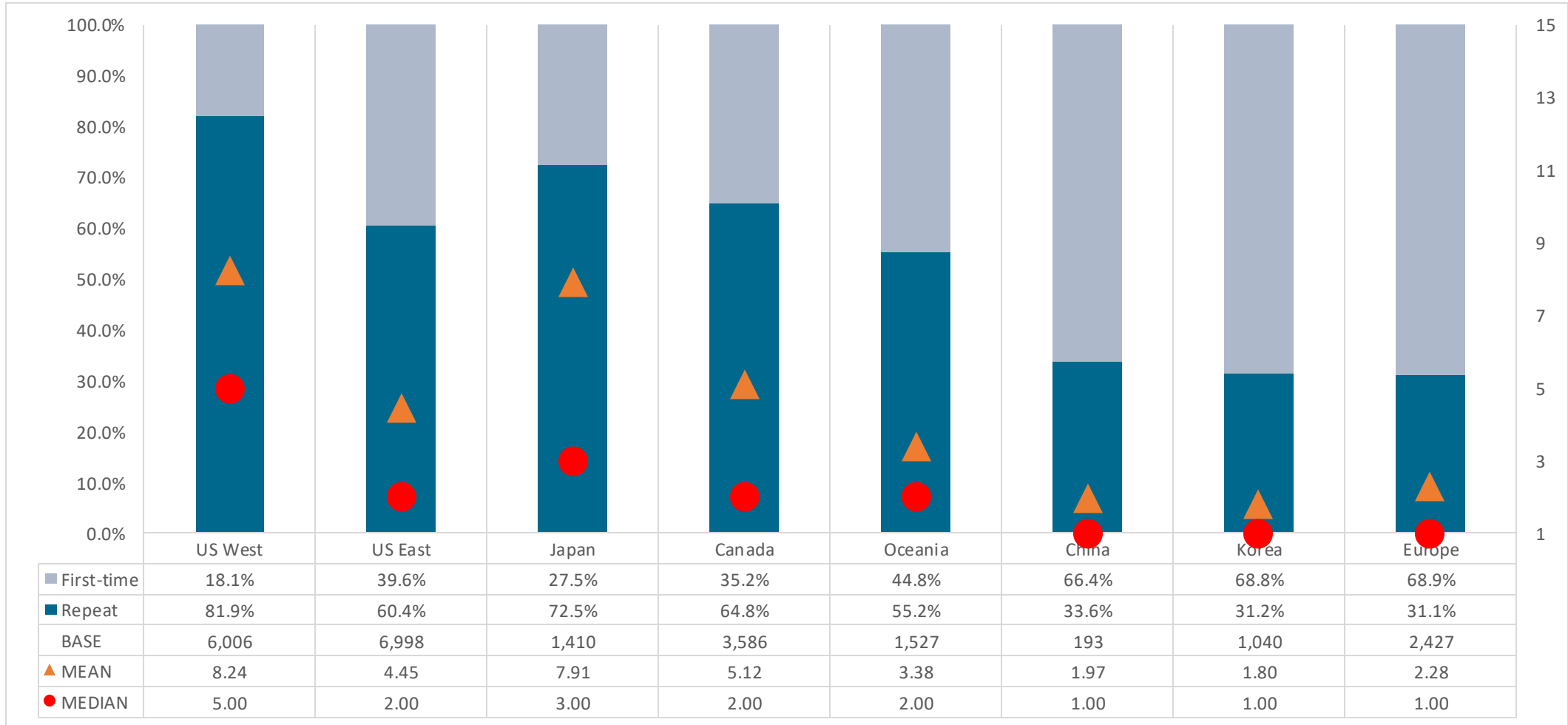
■ A once-in-a-lifetime trip	4.8%	13.2%	3.3%	11.1%	12.6%	7.4%	15.4%	29.4%
■ A special occasion	29.8%	31.7%	28.9%	29.0%	26.8%	36.7%	41.9%	32.0%
■ More special than most trips we take	25.6%	28.6%	28.2%	29.1%	25.9%	27.4%	26.6%	26.2%
■ A regular or semi-annual trip	31.6%	17.8%	31.3%	24.3%	17.8%	24.9%	12.0%	7.6%
■ Other	8.3%	8.7%	8.2%	6.5%	16.9%	3.6%	4.1%	4.8%
BASE	6,006	6,998	1,410	3,586	1,527	193	1,040	2,427

VACATION TRIP DESCRIPTION - SEGMENTATION

- **Age:** Younger visitors (<35) from **U.S. West, Korea** and **Japan** were more likely to view their trip as a once-in-a-lifetime experience or a special occasion.
- **Trips to Hawai'i:** First-time visitors to the state from **U.S. West, U.S. East, Japan, Canada, Oceania** and **Korea** were more likely to view their trip as a once-in-a-lifetime experience or a special occasion.
- **Gender:** More male visitors from **U.S. East** indicate that their trip was an annual or semi-annual trip compared to female visitors from this market. Females from **U.S. East** were more likely to view it as a once-in-a-lifetime experience or special occasion.
- **Household income:** Among visitors from **U.S. West, U.S. East, Oceania** and **Canada**, a higher percentage of respondents who reside in less affluent (<\$100K) households viewed their trip as a special occasion or a once-in-a-lifetime experience.
- **Islands visited:** Visitors from **U.S. East** who stayed on multiple islands were more likely to view their trip as a once-in-a-lifetime experience. Visitors from **China** and **Canada** visiting a single island were more likely to view their trip as a regular or semi-annual trip.
- **Education:** College graduates from **U.S. West** were more likely to classify their trip as a regular occurrence while less educated visitors from this market were more likely to view the trip as something more special.
- **Travel party size:** The trip became more special as the travel party size for visitors from the U.S. East increased.

Section 9 – Trips to Hawai‘i

1st TIME VS REPEAT VISITOR



1st TIME VS REPEAT VISITOR

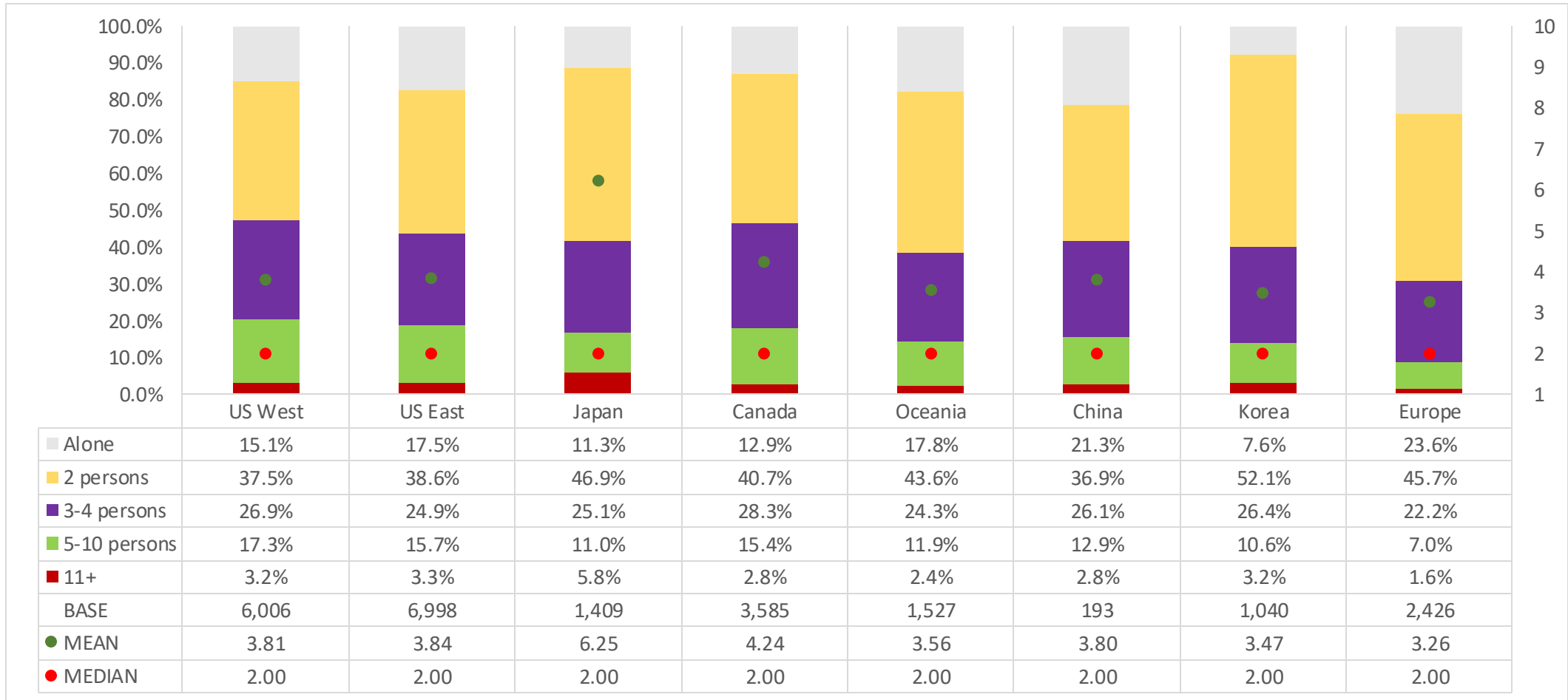
- **Travel party size:** **U.S. West** and **U.S. East** visitors who came in smaller travel parties (ranging from one to sometimes two individuals) have been to Hawai'i more often on average.
- **Household income:** The average number of trips one has taken to Hawai'i increases as visitors become more affluent. This was the case with visitors from **U.S. West** and **U.S. East**.
- **Gender:** Male visitors from **U.S. West**, **U.S. East** and **Canada** traveled to Hawai'i more often than female visitors from these markets.
- **Education:** Respondents from **Canada** without a college degree visited the state more often than college graduates from this visitor market. The opposite was true among **U.S. West** and **U.S. East** visitors, where college graduates were more frequent visitors.
- **Age:** The average number of trips to Hawai'i increases with age across most visitor markets.
- **Islands visited:** Single-island visitors from **Canada** had been to the state more often.

Section 10 – Travel Party

TRAVEL PARTY MEMBERS

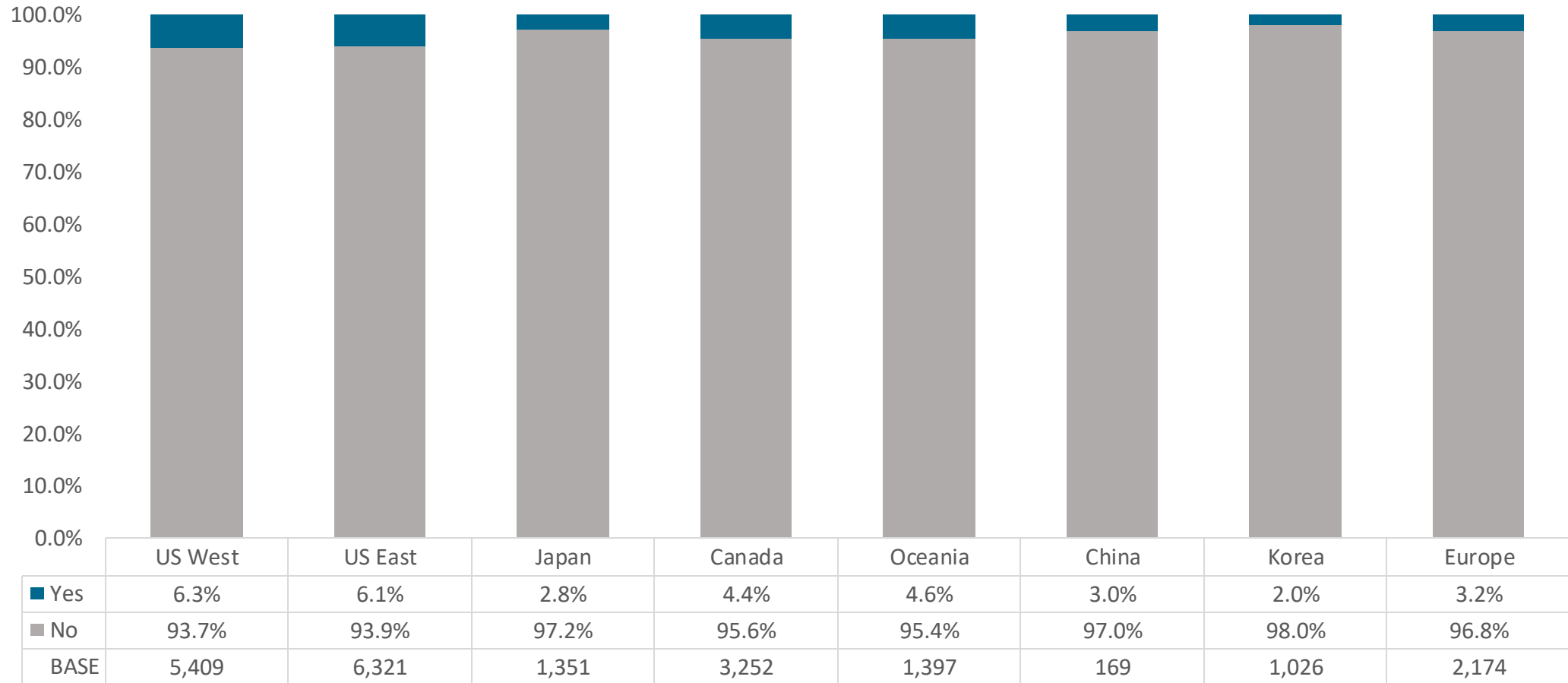
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
My spouse	58.0%	58.0%	60.0%	62.4%	61.9%	32.5%	65.2%	45.9%
Other adult members of my family	29.3%	28.8%	25.0%	28.0%	23.3%	24.1%	19.8%	18.1%
My child(ren)/ grandchild(ren) under 18	27.3%	22.0%	18.8%	23.3%	22.9%	15.8%	18.7%	15.1%
My friends/ associates	15.5%	14.9%	15.1%	16.2%	11.3%	22.7%	12.7%	15.2%
Myself only (traveled alone/ no one else)	9.8%	11.8%	11.5%	7.4%	12.6%	19.9%	6.6%	15.4%
My girlfriend/ boyfriend	7.0%	5.7%	1.9%	5.6%	3.3%	11.7%	1.8%	11.8%
Same gender partner	1.1%	1.0%	0.1%	0.9%	0.4%	1.6%	0.2%	1.4%

TRAVEL PARTY MEMBERS



Section 11 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

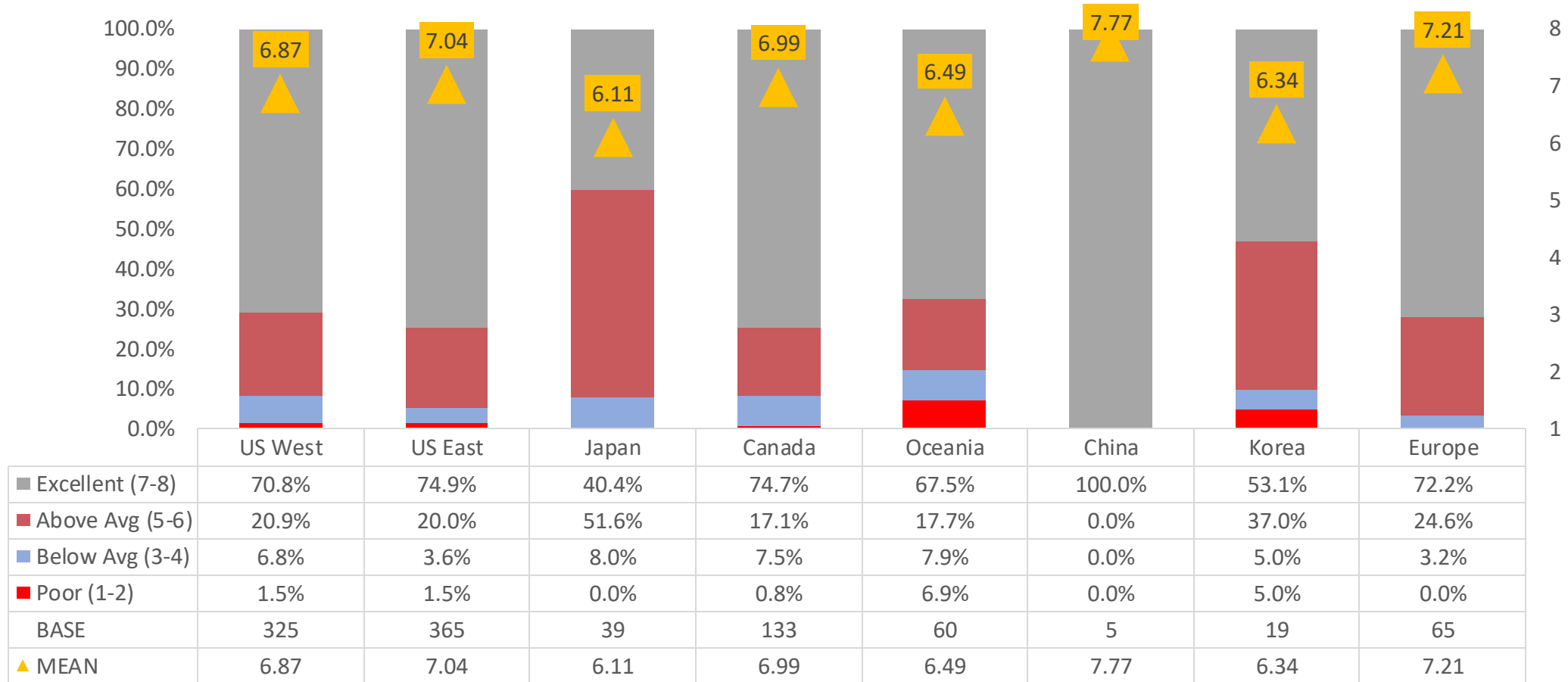


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Mobility aid	71.8%	71.1%	35.7%	63.6%	55.5%	59.1%	25.6%	52.8%
Personal assistance	30.0%	17.9%	7.6%	22.6%	33.2%	0.0%	9.3%	12.5%
NA- No one needed assistance	4.1%	7.6%	33.6%	10.5%	11.7%	40.9%	39.6%	21.6%
Other	6.8%	6.8%	2.5%	6.5%	1.9%	0.0%	0.0%	4.3%
Orientation and mobility Assistance	4.4%	3.6%	15.5%	6.4%	4.7%	0.0%	4.7%	10.0%
Lift-equipped van	1.2%	1.8%	7.6%	1.5%	0.0%	0.0%	0.0%	5.8%
ASL interpreter/ texting/ captioning	0.3%	1.6%	2.5%	1.4%	0.0%	0.0%	9.3%	0.0%
Disabled parking/ placard	0.6%	0.5%	2.5%	2.3%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	0.6%	0.7%	0.0%	0.0%	0.0%	0.0%	4.7%	1.4%
Ambulance/ hospital/ medical visit	0.0%	1.4%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Service/ assistance animal	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	5.8%	1.5%
No help was offered	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%
Respiratory equipment	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

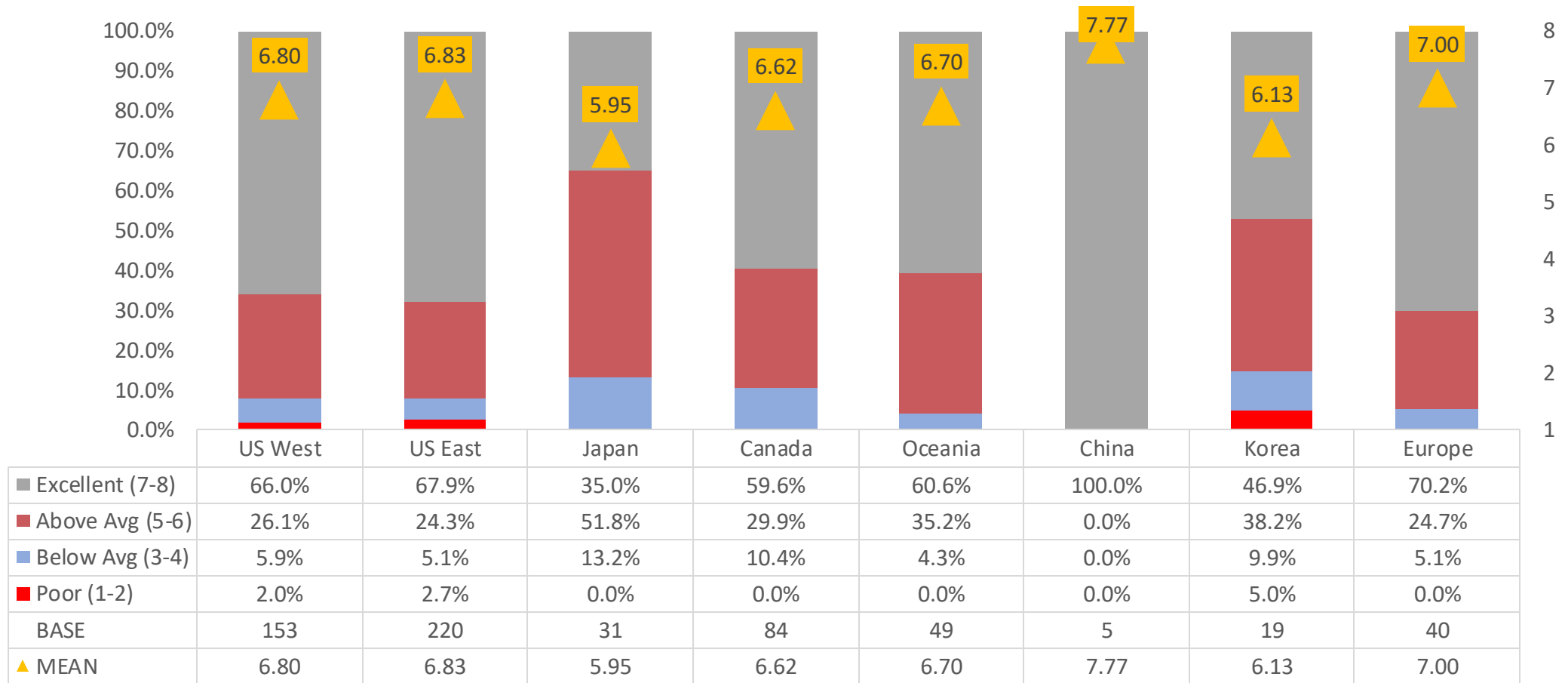
OVERALL ACCESSIBILITY - AIRPORTS

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



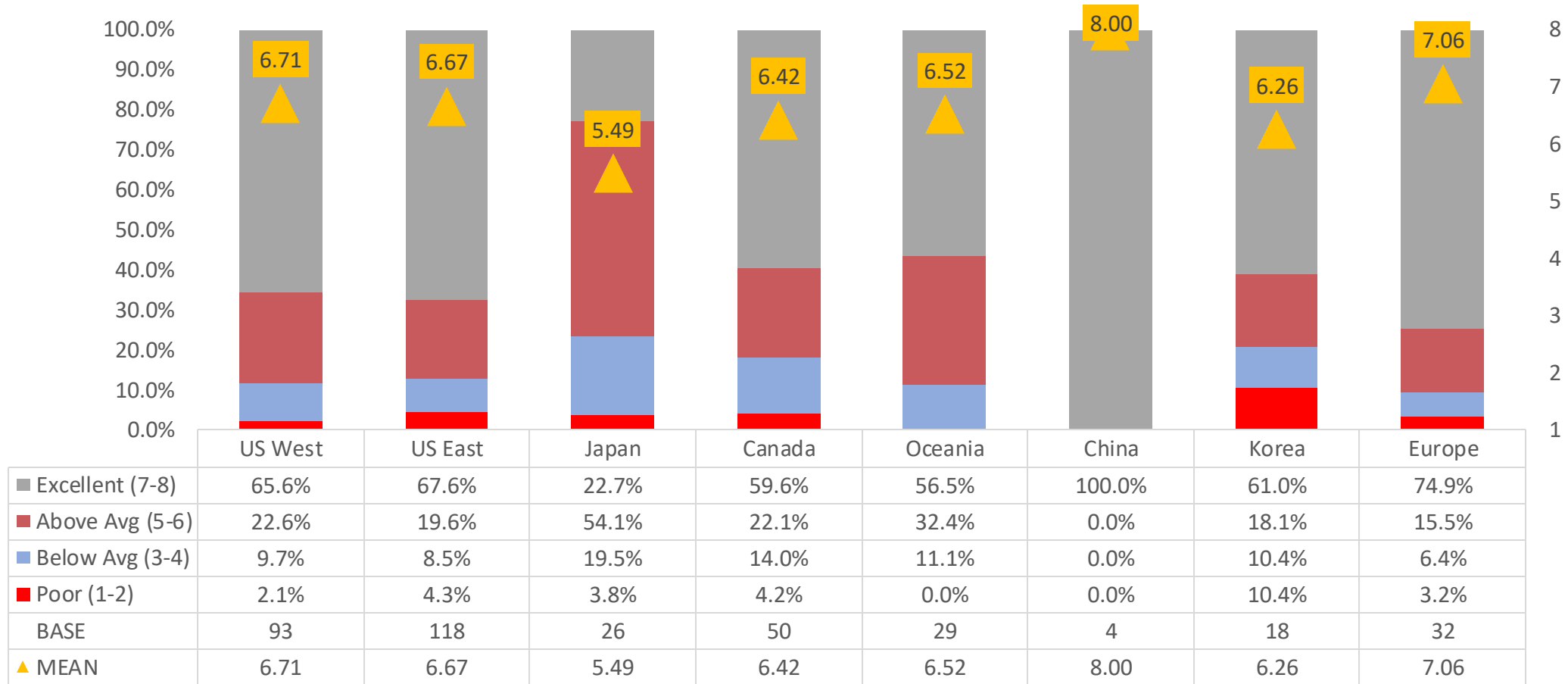
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



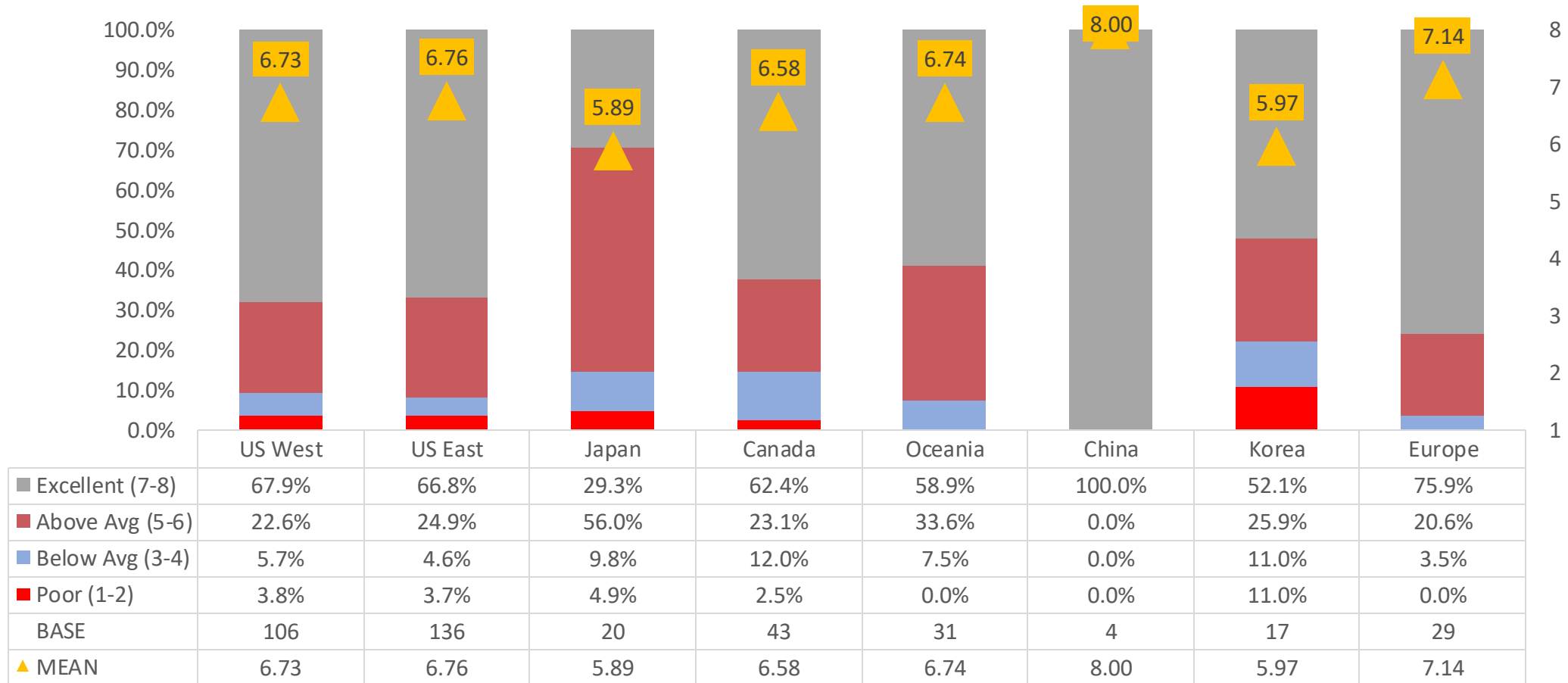
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



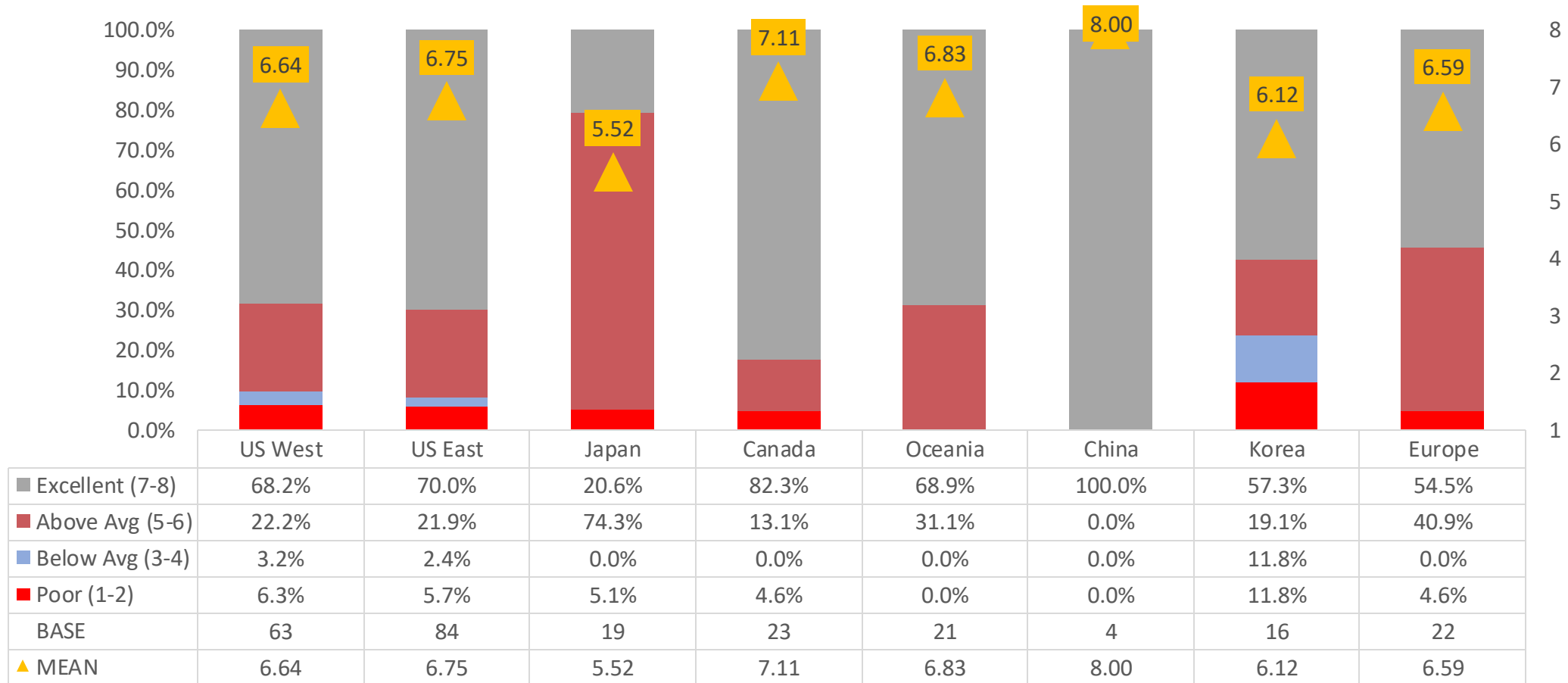
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



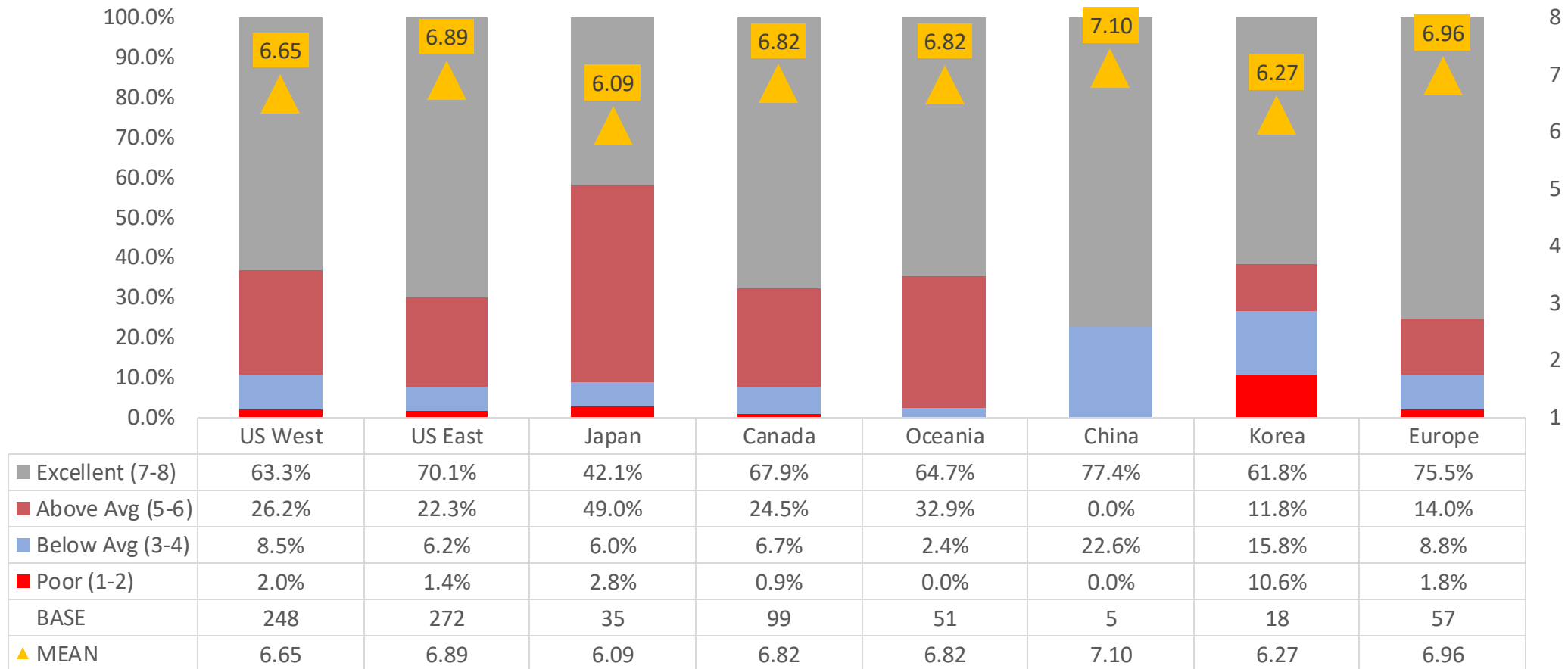
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



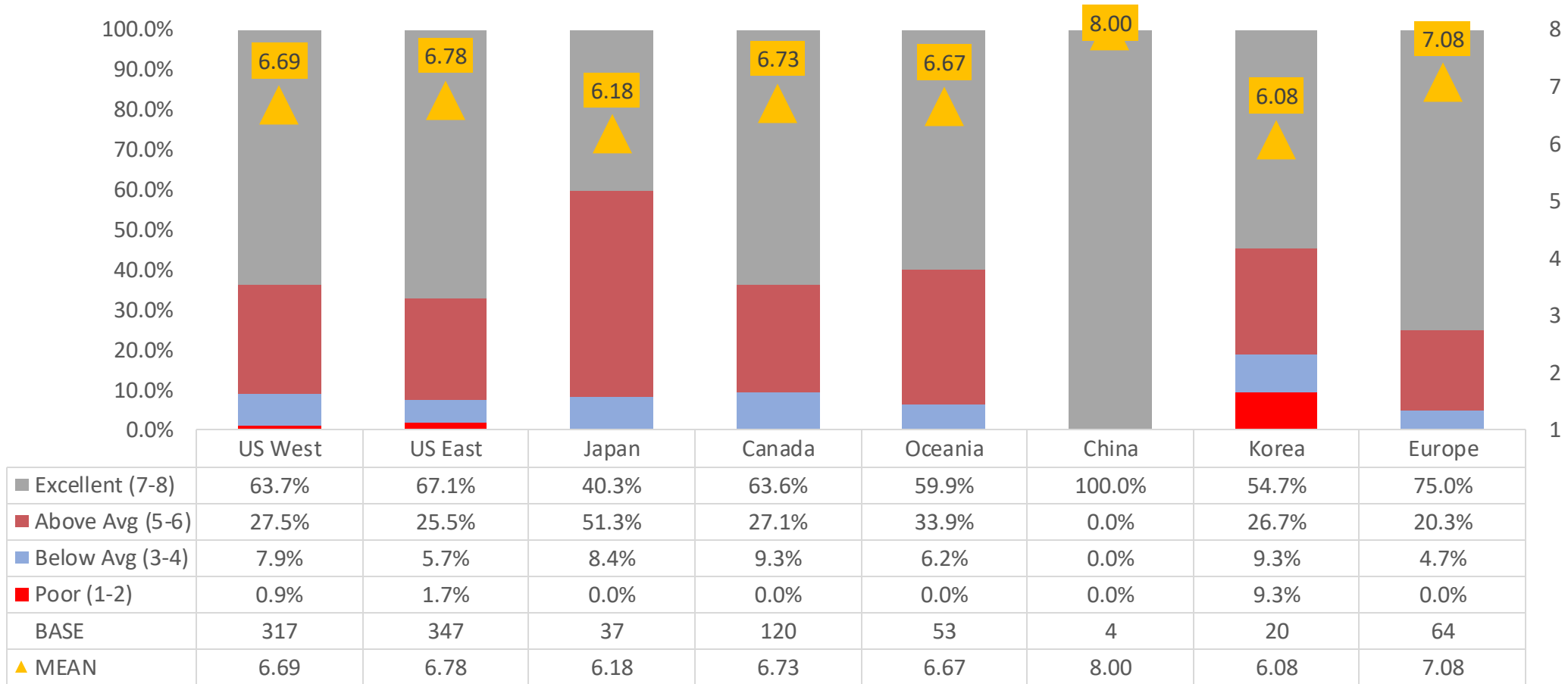
OVERALL ACCESSIBILITY - HOTELS

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



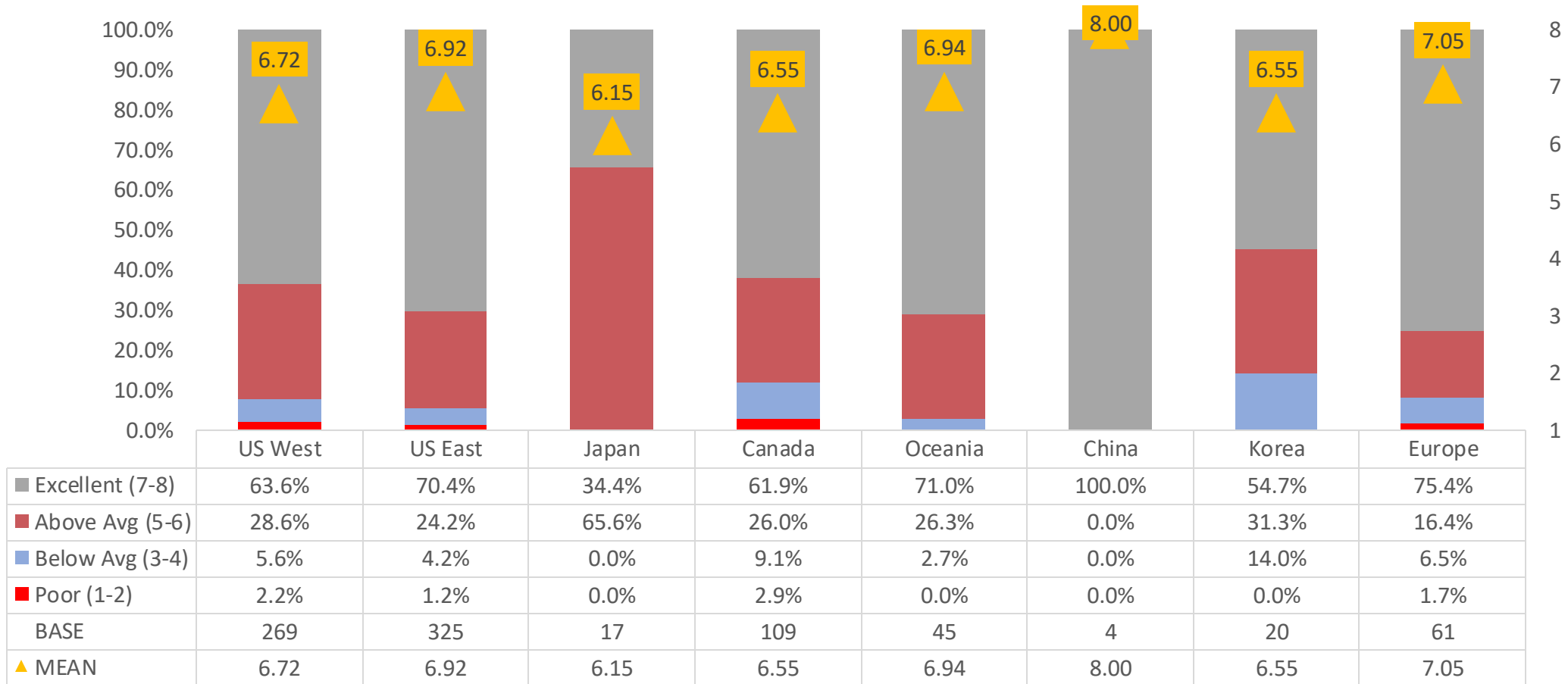
OVERALL ACCESSIBILITY - RESTAURANTS

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



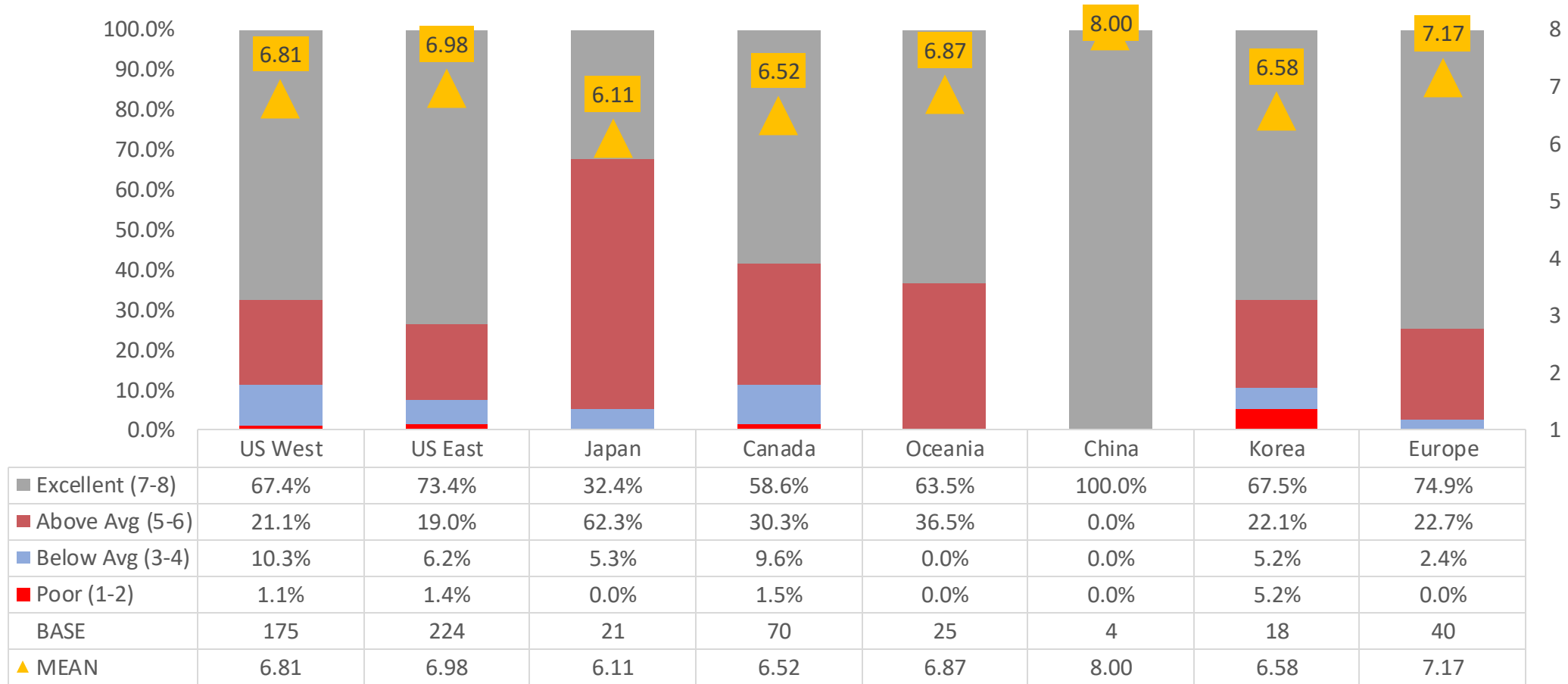
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



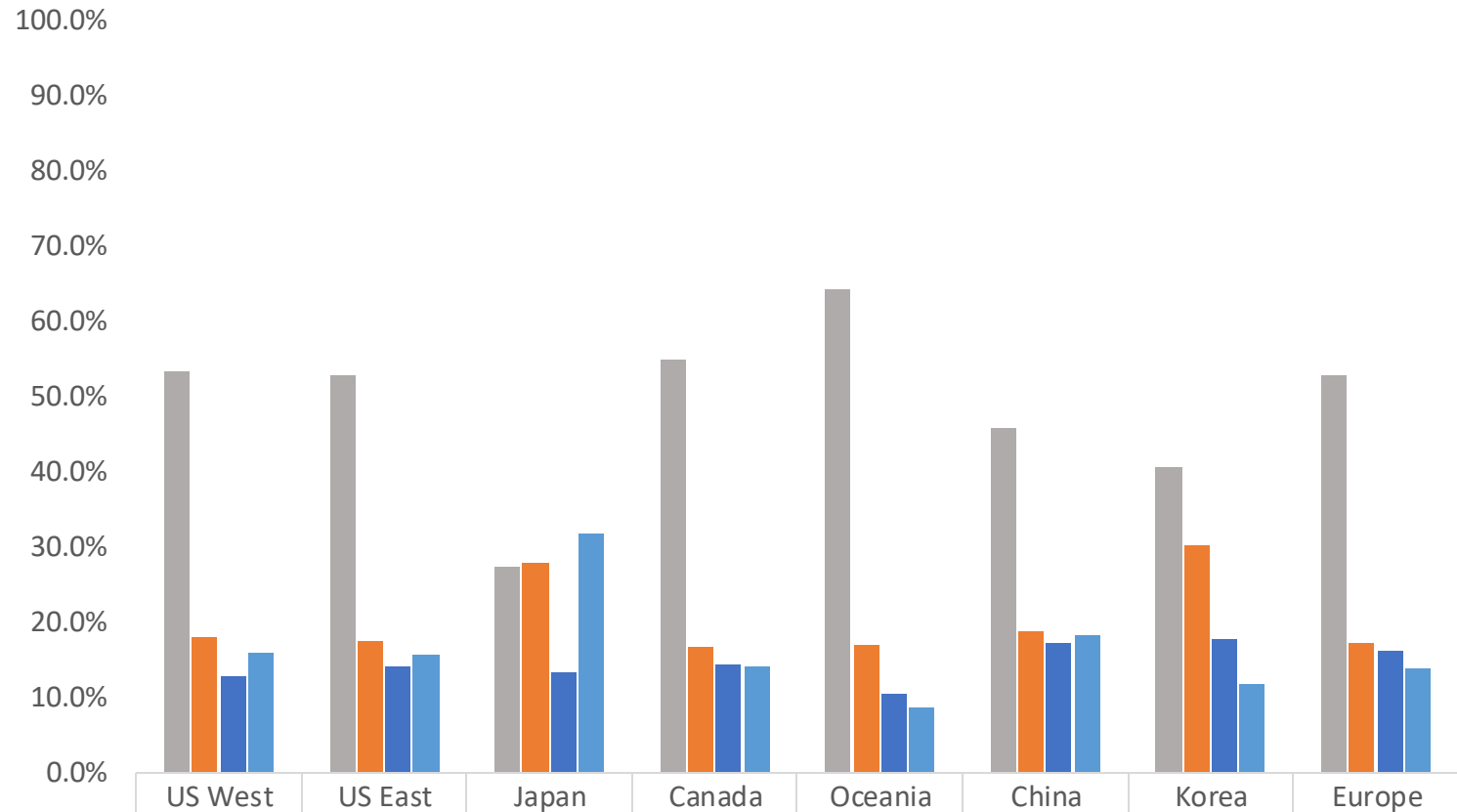
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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



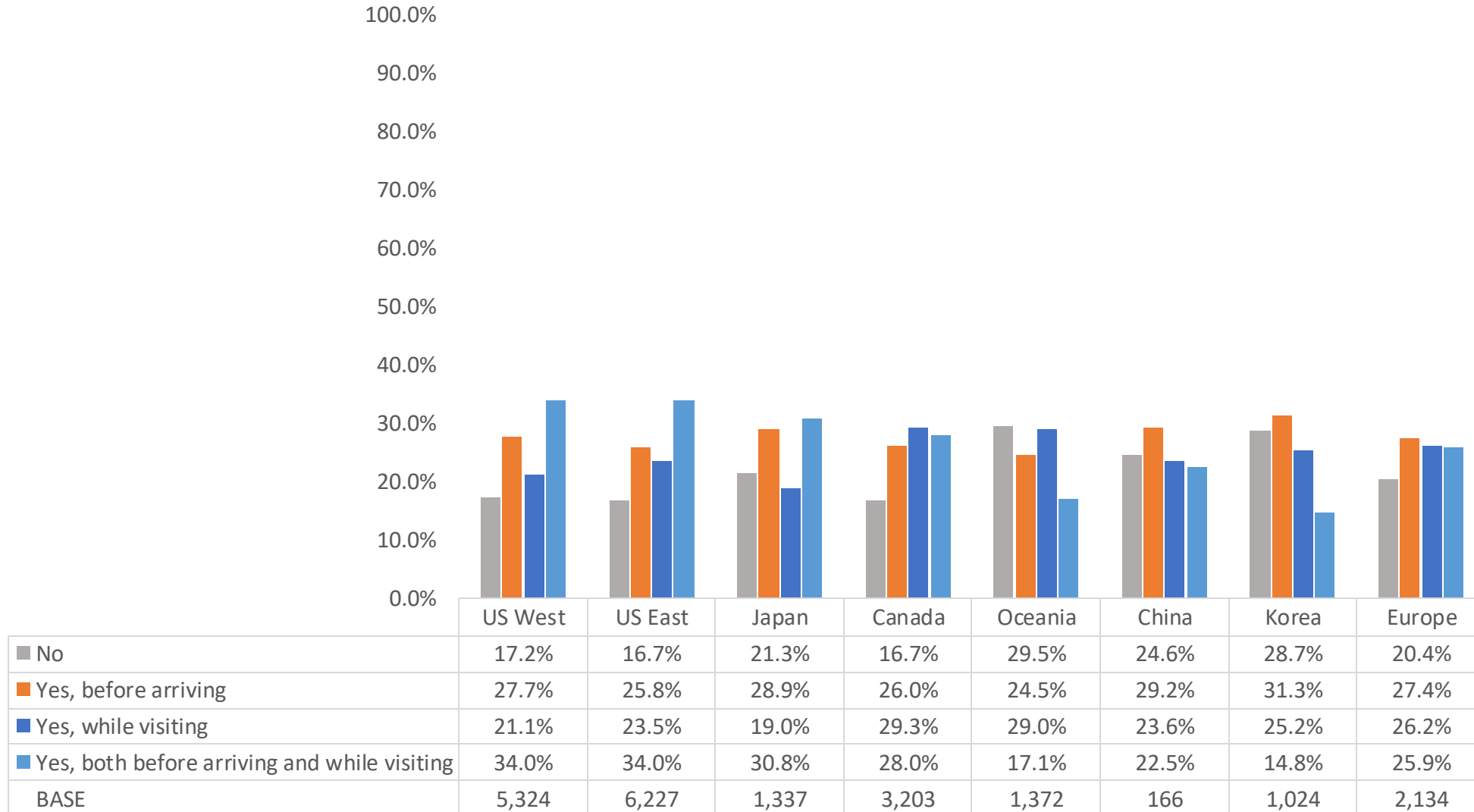
Section 12 – Alternative Messaging

SAFE AND RESPONSIBLE TRAVEL

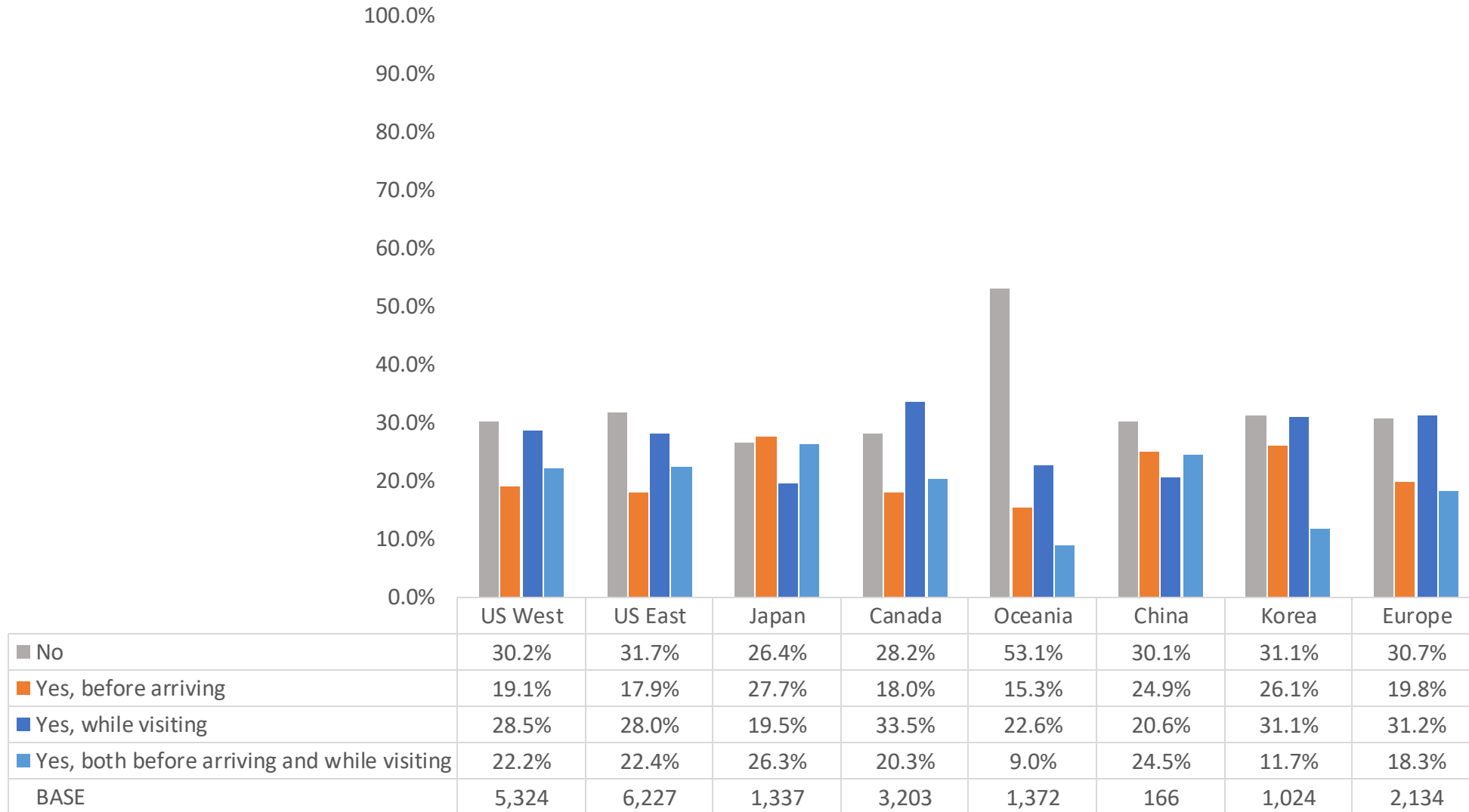


■ No	53.4%	52.9%	27.3%	54.9%	64.1%	45.9%	40.6%	52.9%
■ Yes, before arriving	17.8%	17.4%	27.8%	16.7%	16.8%	18.7%	30.1%	17.3%
■ Yes, while visiting	12.8%	14.0%	13.2%	14.3%	10.5%	17.1%	17.7%	16.1%
■ Yes, both before arriving and while visiting	15.9%	15.7%	31.8%	14.0%	8.6%	18.3%	11.6%	13.7%
BASE	5,324	6,227	1,337	3,203	1,372	166	1,024	2,134

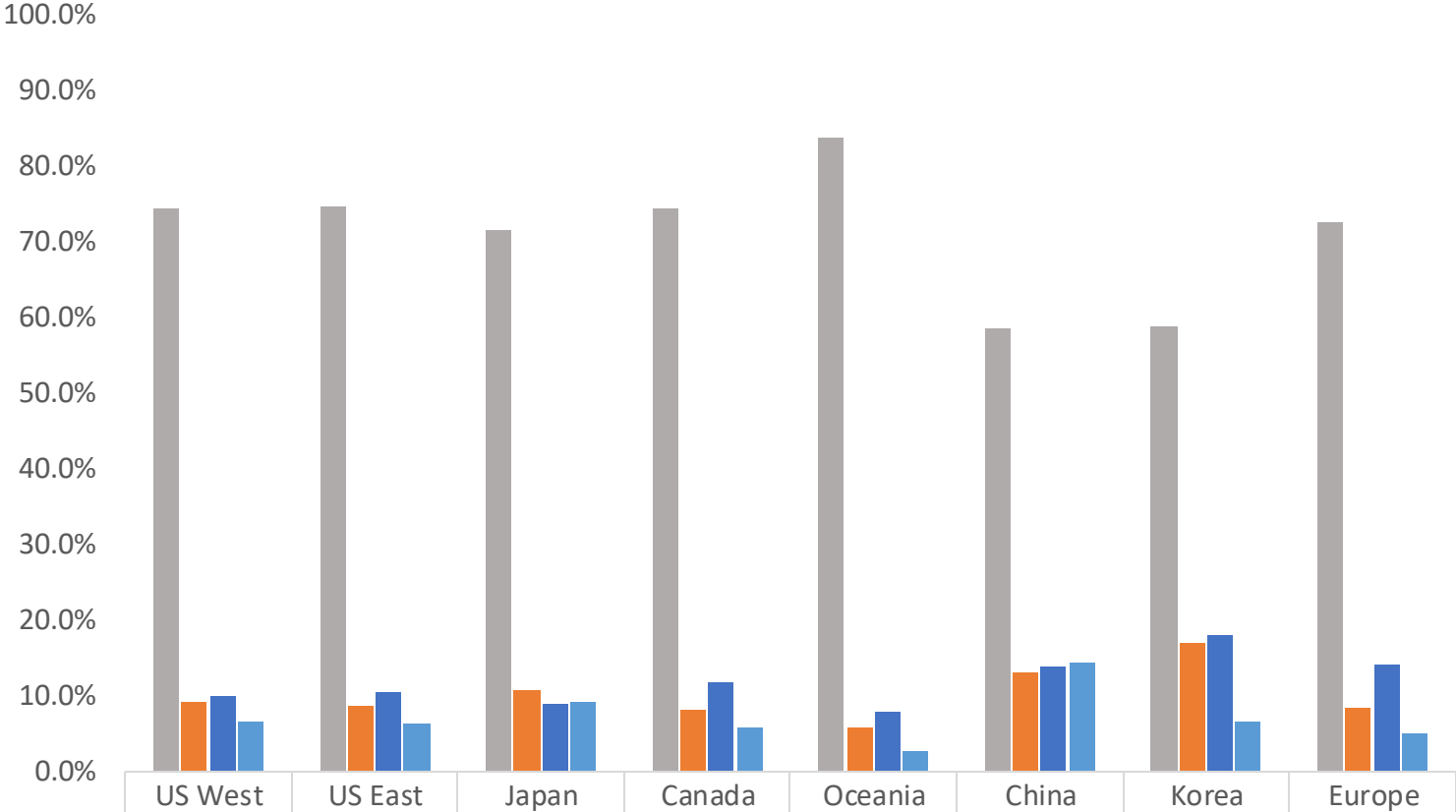
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE, AND ENVIRONMENT



OCEAN AND HIKING SAFETY

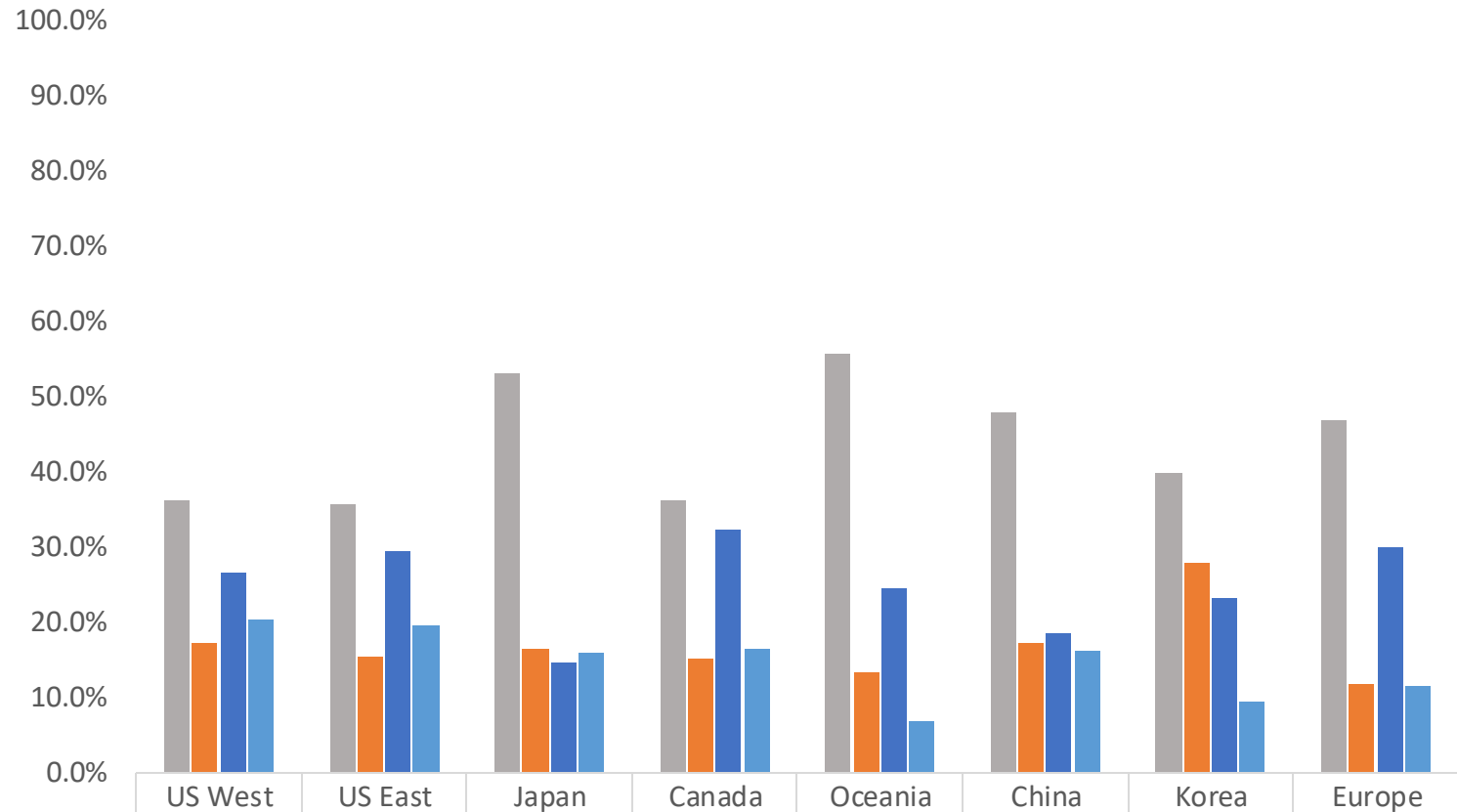


VOLUNTEER/ GIVE-BACK OPPORTUNITIES



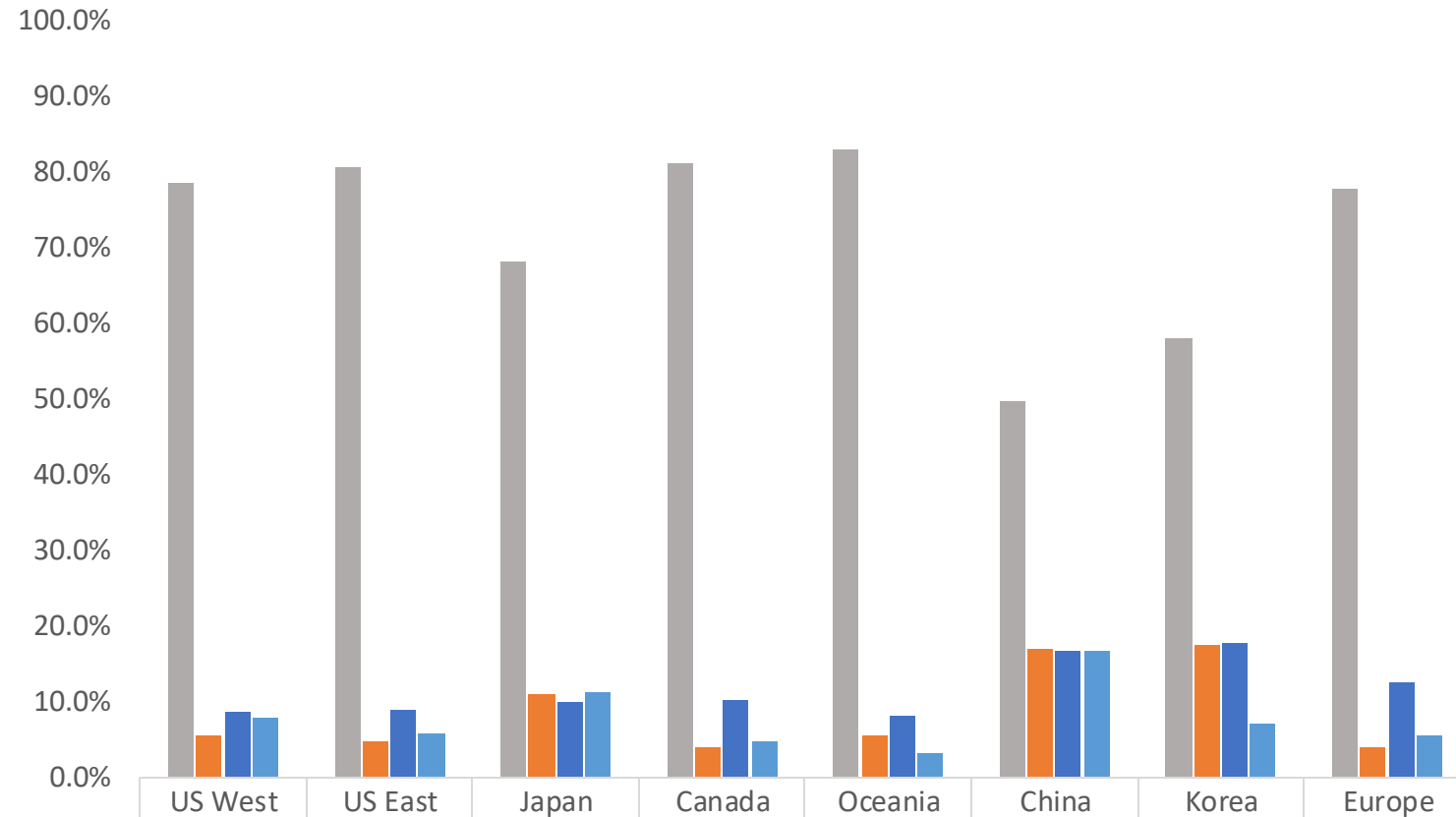
■ No	74.5%	74.6%	71.5%	74.4%	83.7%	58.6%	58.8%	72.6%
■ Yes, before arriving	9.0%	8.6%	10.6%	8.1%	5.9%	13.2%	16.9%	8.4%
■ Yes, while visiting	9.9%	10.5%	8.9%	11.7%	7.8%	13.8%	17.9%	14.0%
■ Yes, both before arriving and while visiting	6.6%	6.3%	9.0%	5.8%	2.6%	14.4%	6.4%	5.0%
BASE	5,324	6,227	1,337	3,203	1,372	166	1,024	2,134

SUPPORT LOCAL/ SHOP LOCAL



■ No	36.0%	35.6%	53.1%	36.2%	55.7%	48.0%	39.7%	46.9%
■ Yes, before arriving	17.2%	15.5%	16.4%	15.1%	13.2%	17.2%	27.9%	11.9%
■ Yes, while visiting	26.5%	29.5%	14.6%	32.3%	24.5%	18.6%	23.2%	29.8%
■ Yes, both before arriving and while visiting	20.2%	19.4%	15.9%	16.5%	6.7%	16.2%	9.3%	11.4%
BASE	5,324	6,227	1,337	3,203	1,372	166	1,024	2,134

MĀLAMA HAWAI‘I

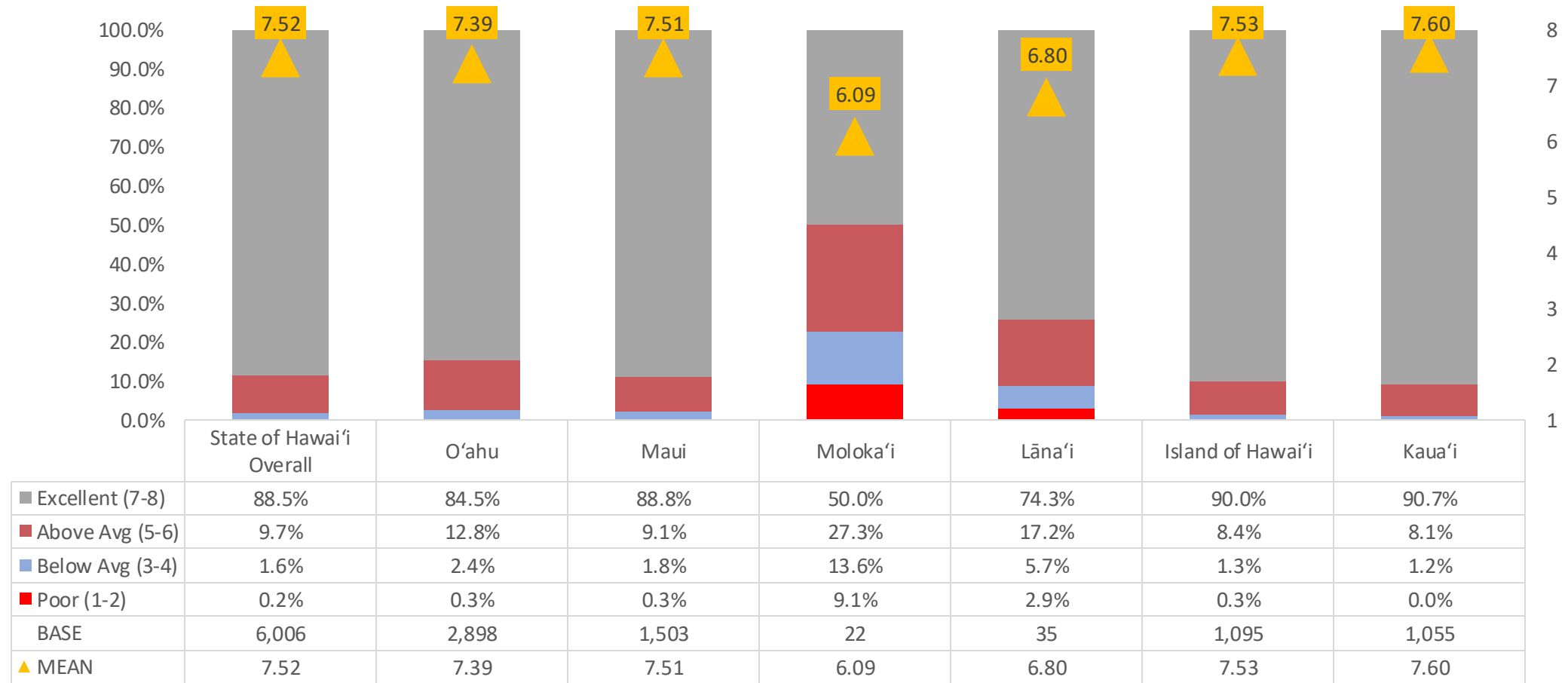


■ No	78.4%	80.7%	68.1%	81.0%	83.0%	49.6%	58.0%	77.9%
■ Yes, before arriving	5.4%	4.7%	10.9%	4.1%	5.6%	16.9%	17.4%	4.0%
■ Yes, while visiting	8.5%	8.8%	9.8%	10.2%	8.2%	16.7%	17.7%	12.6%
■ Yes, both before arriving and while visiting	7.7%	5.9%	11.2%	4.7%	3.2%	16.8%	7.0%	5.5%
BASE	5,324	6,227	1,337	3,203	1,372	166	1,024	2,134

Section 13 – U.S. West

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

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



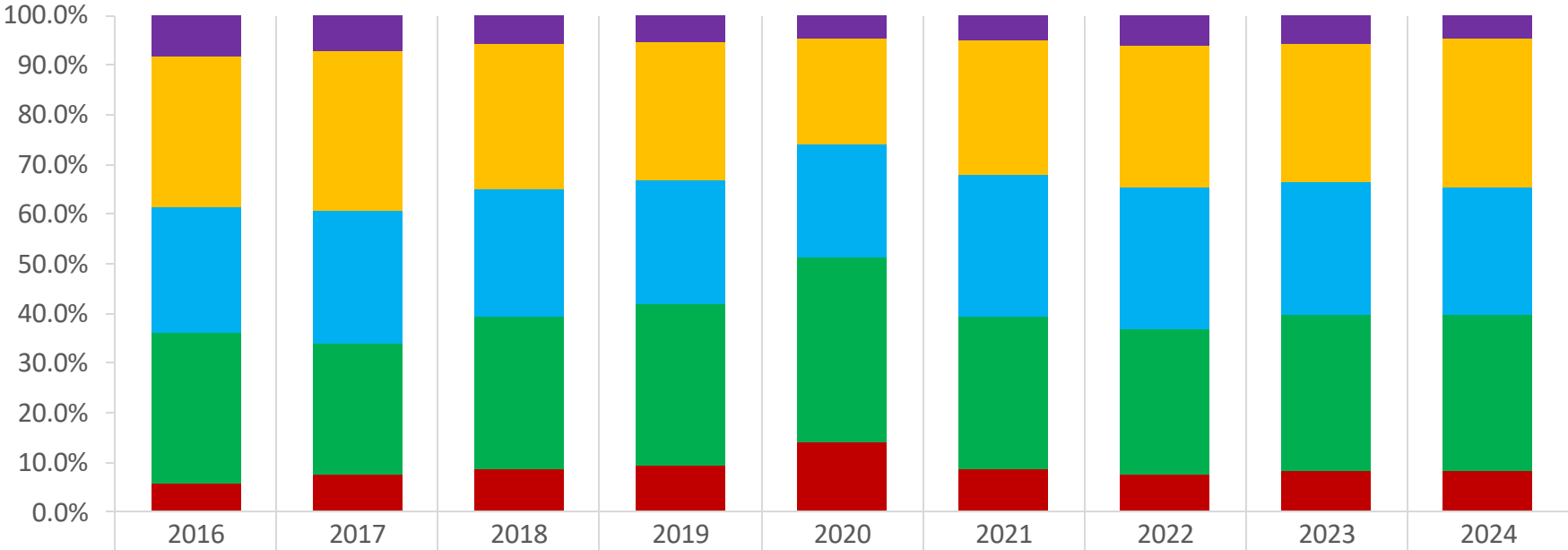
PRIMARY PURPOSE OF TRIP – U.S. WEST

	2018	2019	2020	2021	2022	2023	2024
Vacation	59.5%	61.5%	64.6%	76.3%	75.0%	71.7%	71.4%
Visit friends/ relatives	8.2%	7.7%	19.8%	10.8%	10.1%	10.8%	11.1%
Other business trip/ work in Hawai'i	3.9%	3.8%	4.3%	2.5%	2.1%	3.1%	3.4%
Anniversary/ birthday	7.8%	8.4%	1.6%	2.2%	3.0%	3.0%	2.4%
Convention/ conference	2.6%	1.8%	0.5%	0.5%	1.2%	1.7%	1.9%
Honeymoon	2.0%	1.6%	1.4%	2.1%	2.1%	1.6%	1.9%
Attend wedding/ vow renewal	3.2%	2.6%	0.4%	0.9%	1.3%	1.6%	1.6%

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

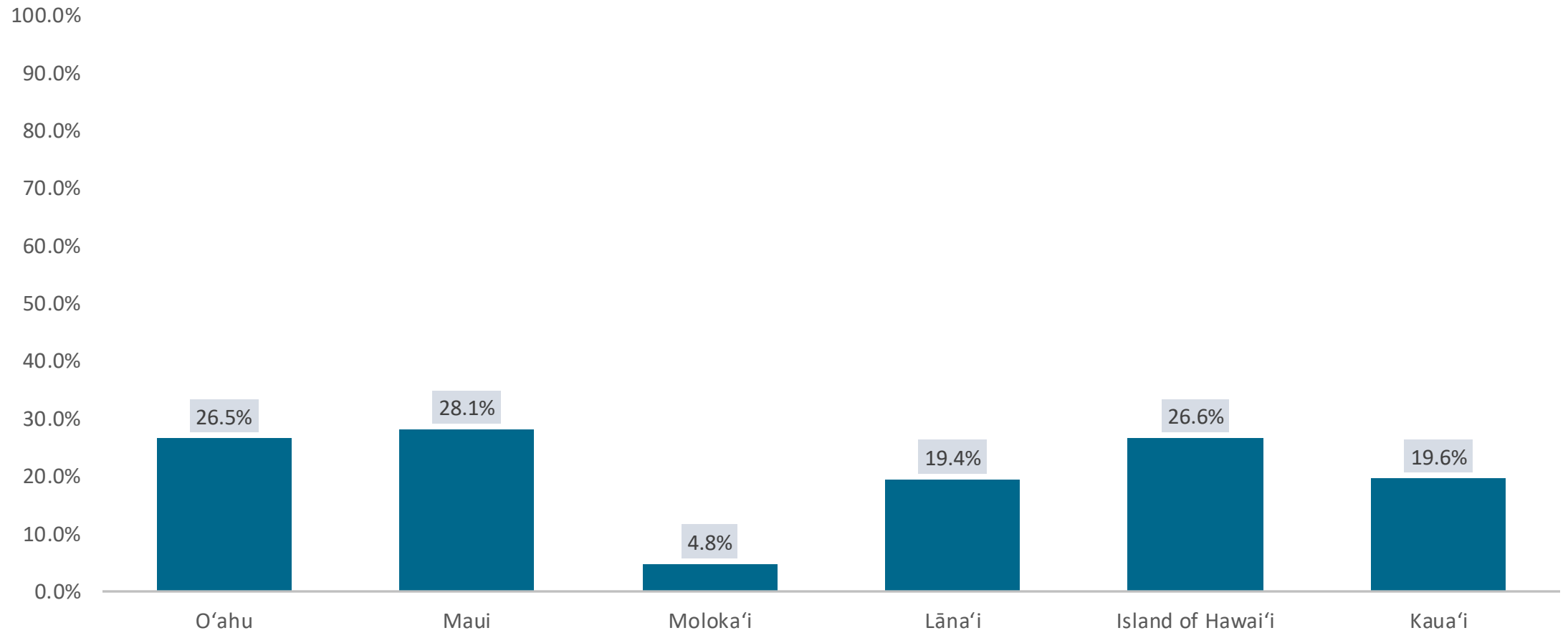
	2018	2019	2020	2021	2022	2023	2024
Vacation	82.8%	84.1%	81.5%	90.7%	90.2%	88.5%	87.9%
Visit friends/ relatives	16.6%	15.9%	28.8%	20.8%	20.3%	20.7%	20.3%
Anniversary/ birthday	14.1%	15.8%	3.5%	4.7%	5.7%	5.9%	5.2%
Other business trip/ work in Hawai'i	5.5%	5.4%	7.1%	4.4%	3.9%	4.8%	5.0%
Honeymoon	2.7%	2.3%	2.1%	3.0%	2.9%	2.5%	2.6%
Convention/ conference	3.3%	2.3%	0.8%	0.6%	1.6%	2.1%	2.4%
Attend wedding/ vow renewal	0.9%	3.1%	0.6%	1.3%	1.7%	2.0%	1.9%
Incentive trip	1.6%	1.9%	1.0%	1.2%	1.4%	1.5%	1.2%

VACATION TRIP DESCRIPTION - U.S. WEST

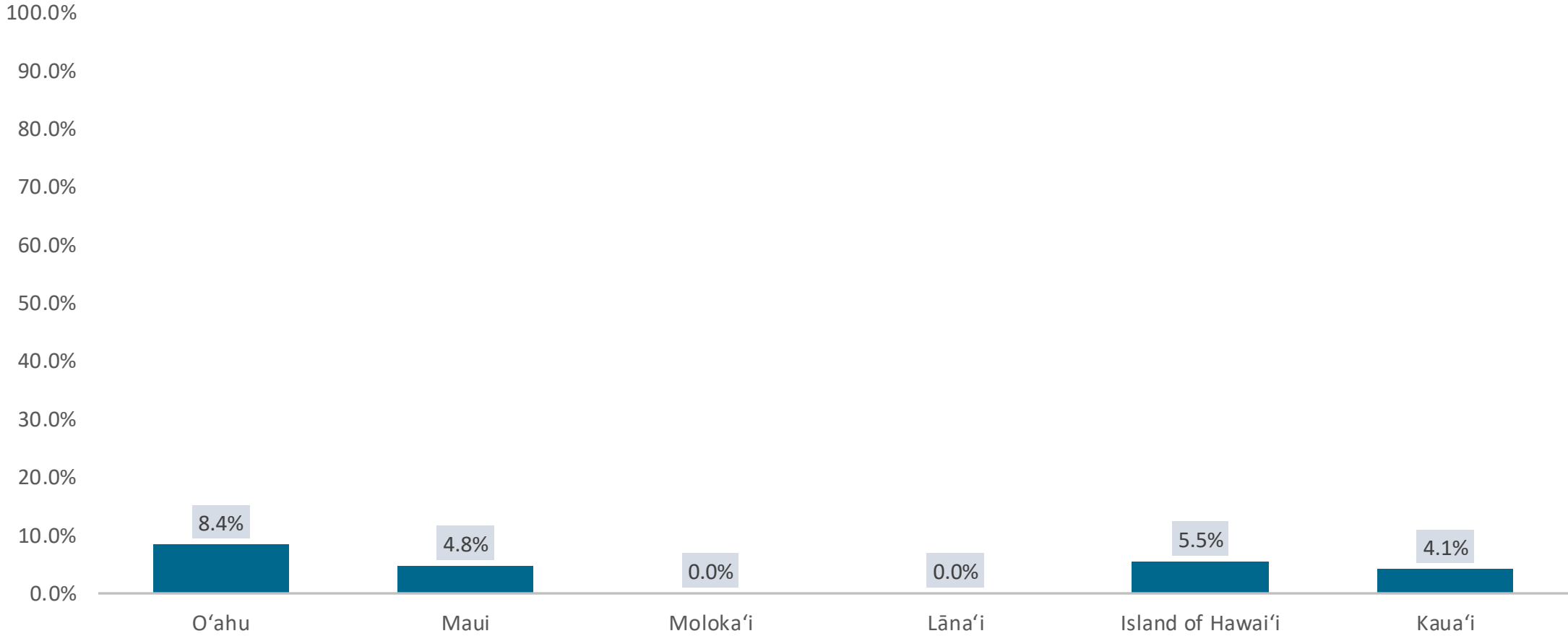


	2016	2017	2018	2019	2020	2021	2022	2023	2024
Once-in-a-lifetime	8.3%	7.2%	5.9%	5.4%	4.6%	5.2%	5.9%	5.6%	4.8%
Special occasion	30.3%	32.1%	29.2%	27.8%	21.2%	27.1%	28.8%	27.9%	29.8%
More special than most trips	25.3%	26.8%	25.4%	25.0%	22.9%	28.4%	28.5%	26.9%	25.6%
Annual/ Semi-annual trip	30.3%	26.2%	30.8%	32.6%	37.1%	30.8%	29.1%	31.2%	31.6%
Other	5.8%	7.7%	8.7%	9.2%	14.2%	8.6%	7.6%	8.4%	8.3%

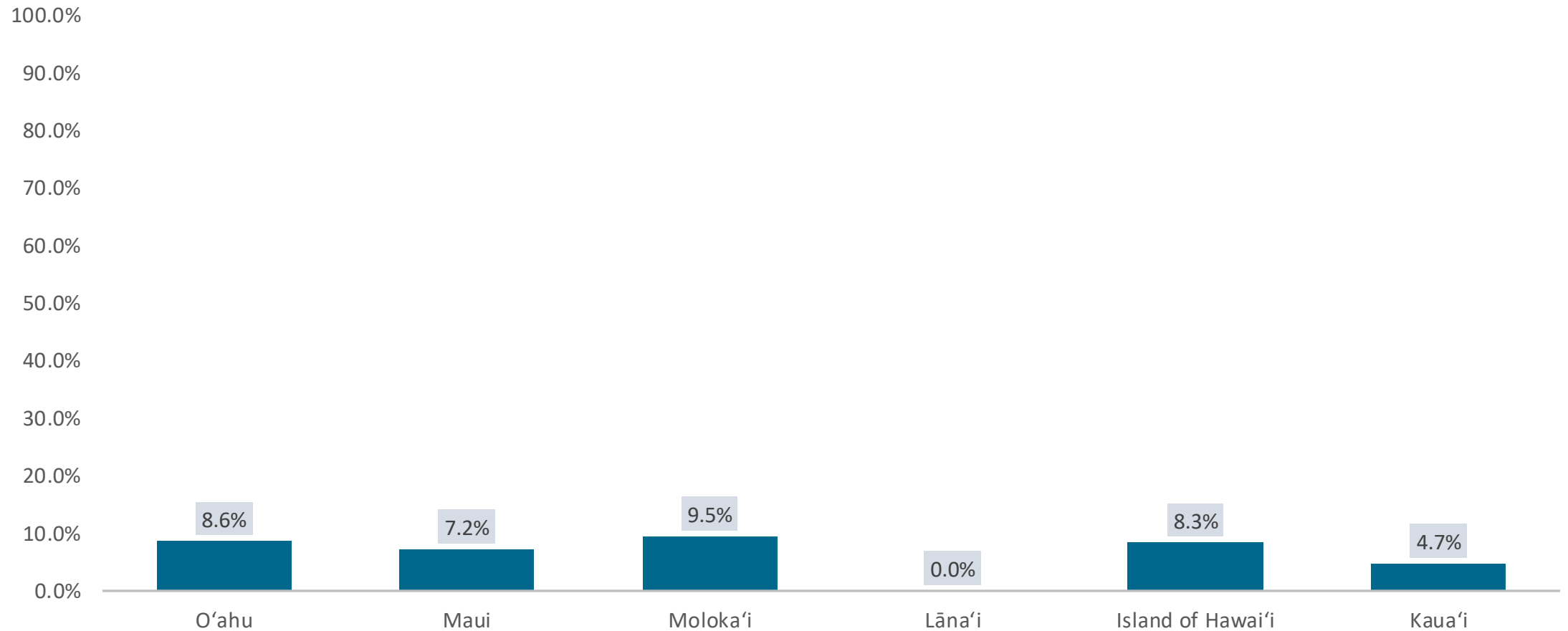
ADVERTISING AWARENESS - U.S. WEST



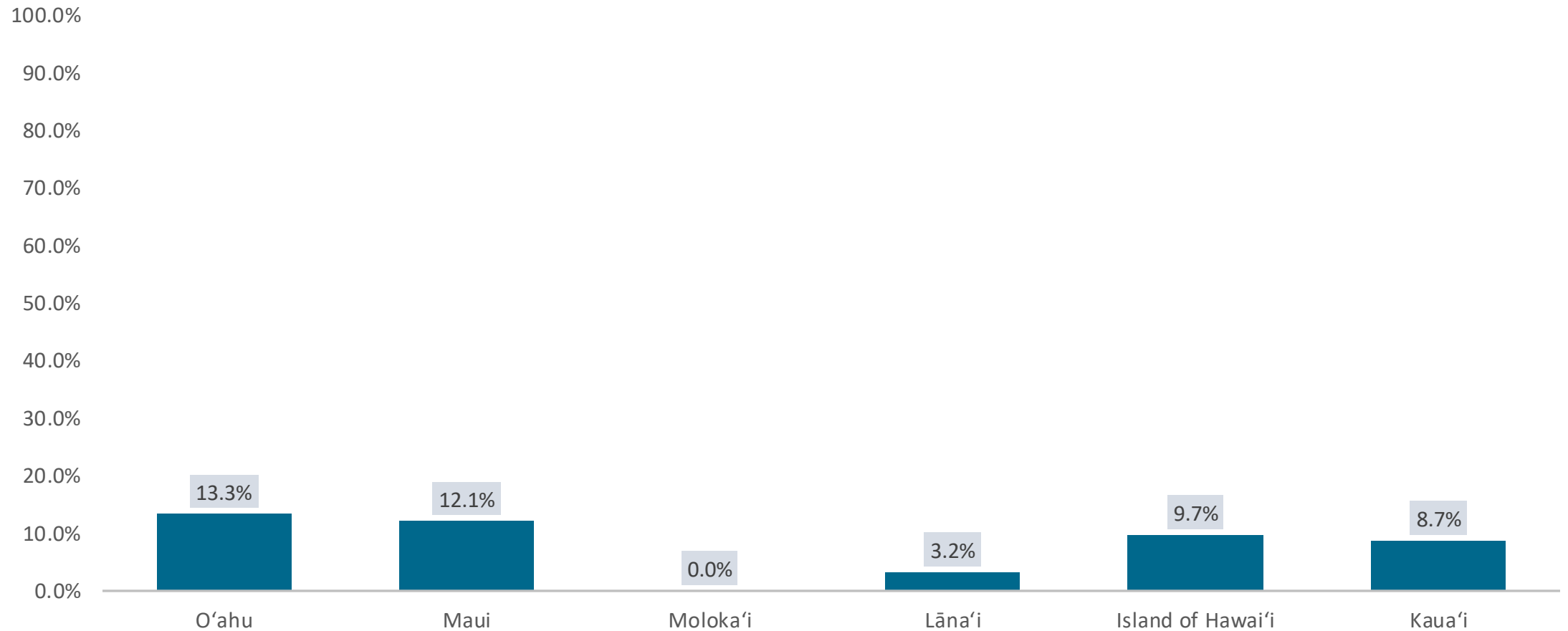
IMPACT OF LOCATION FILMING - U.S. WEST



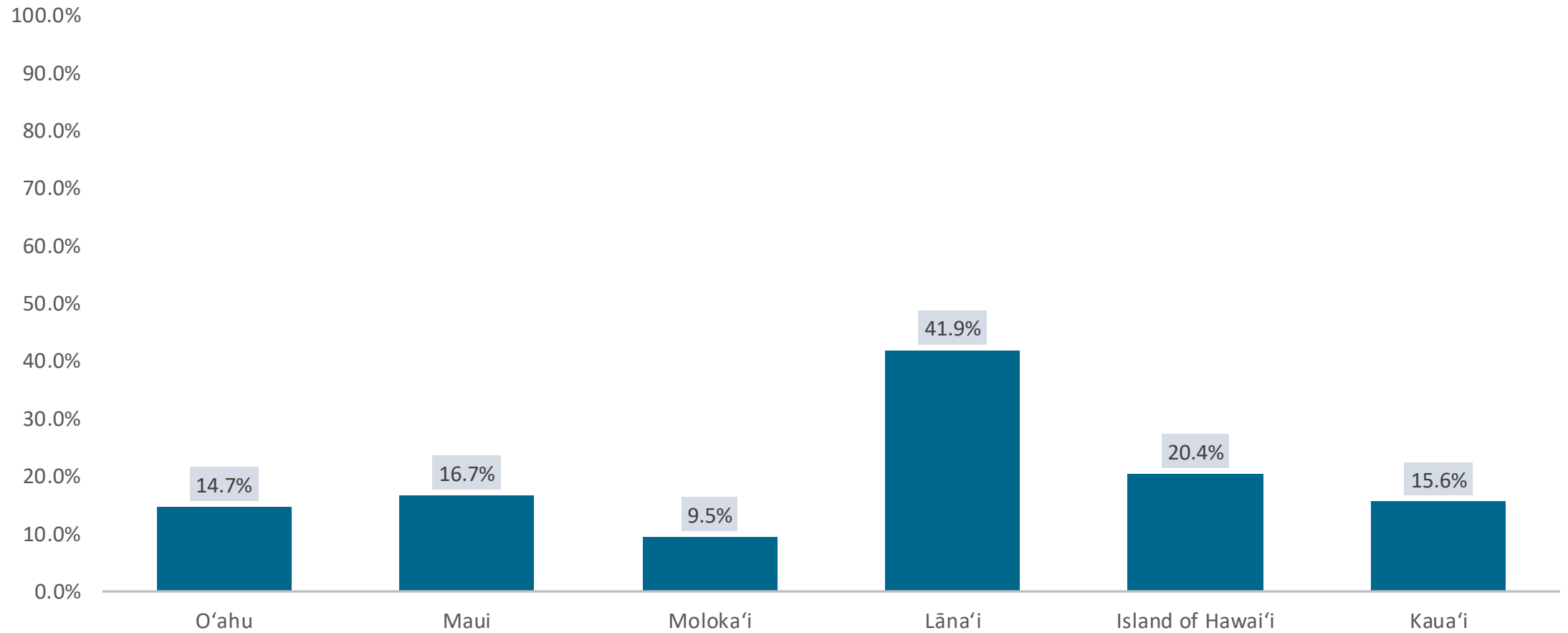
IMPACT OF HAWAIIAN MUSIC - U.S. WEST



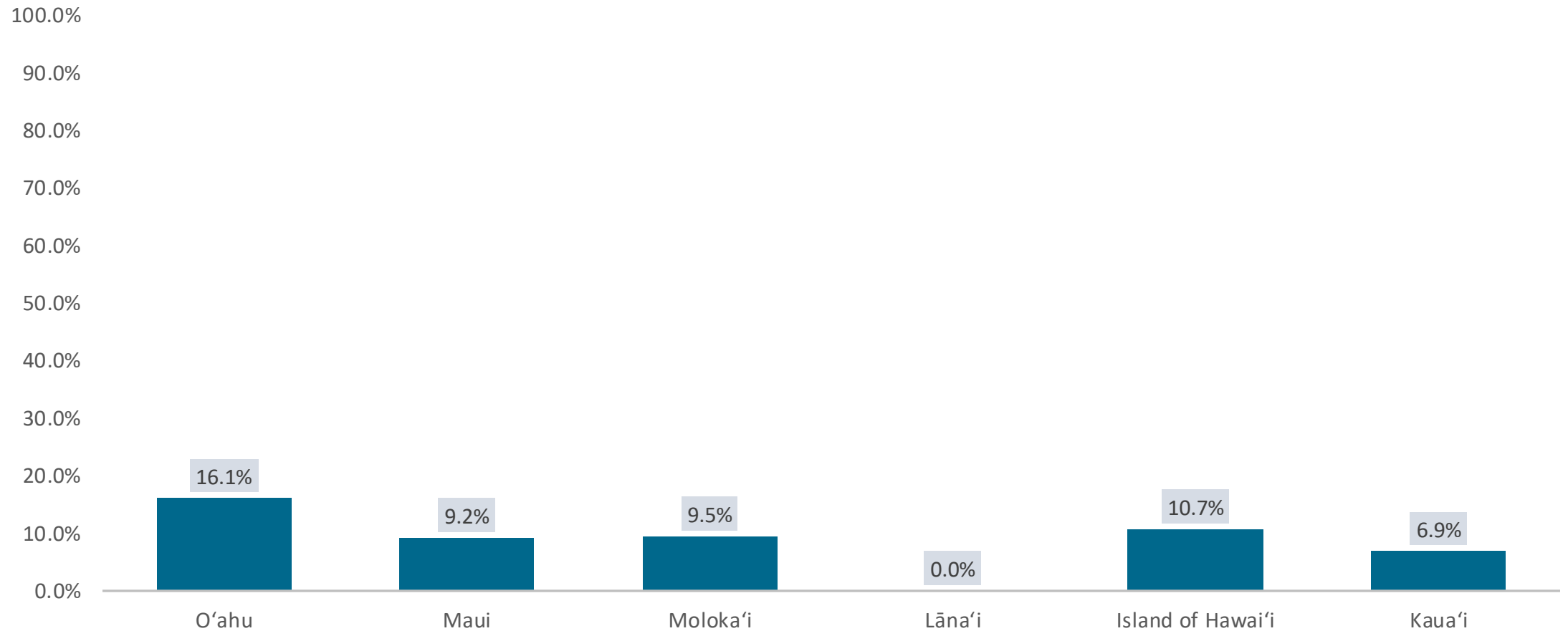
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS – U.S. WEST



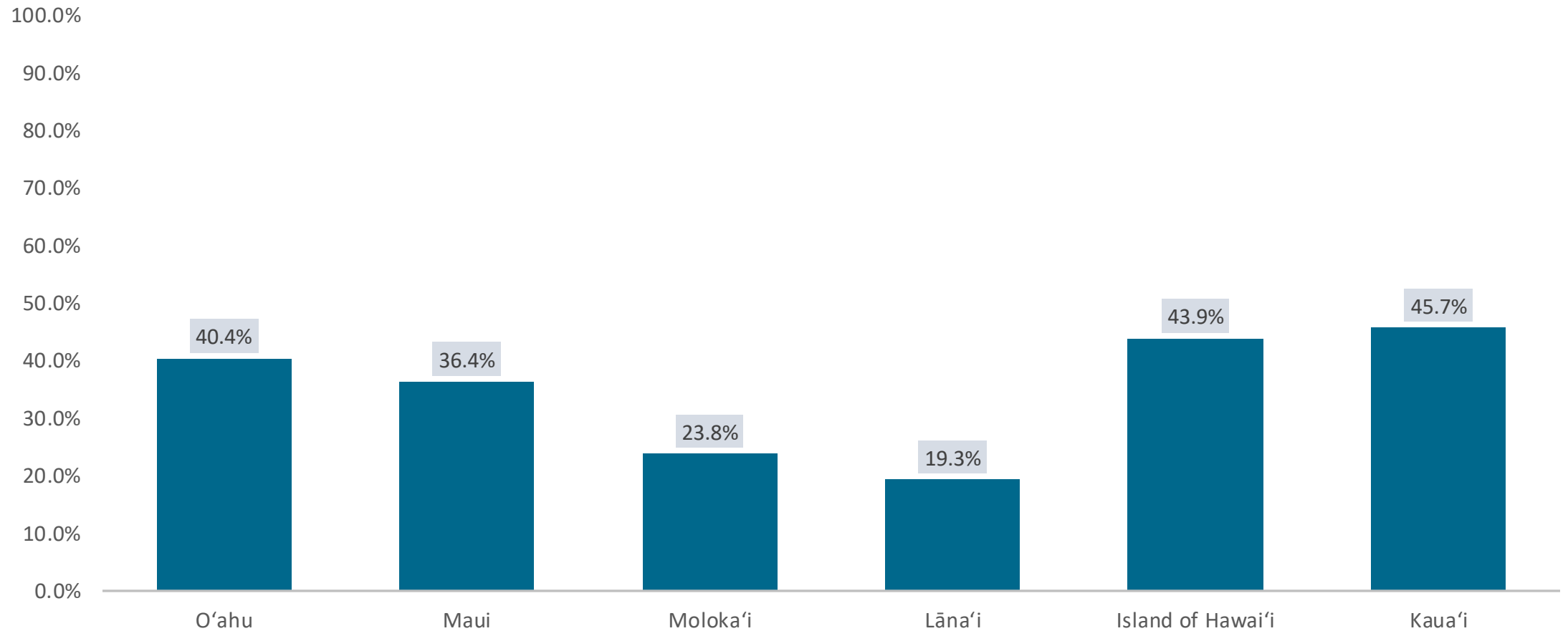
IMPACT OF OUTDOOR/ SPORTING EVENTS - U.S. WEST



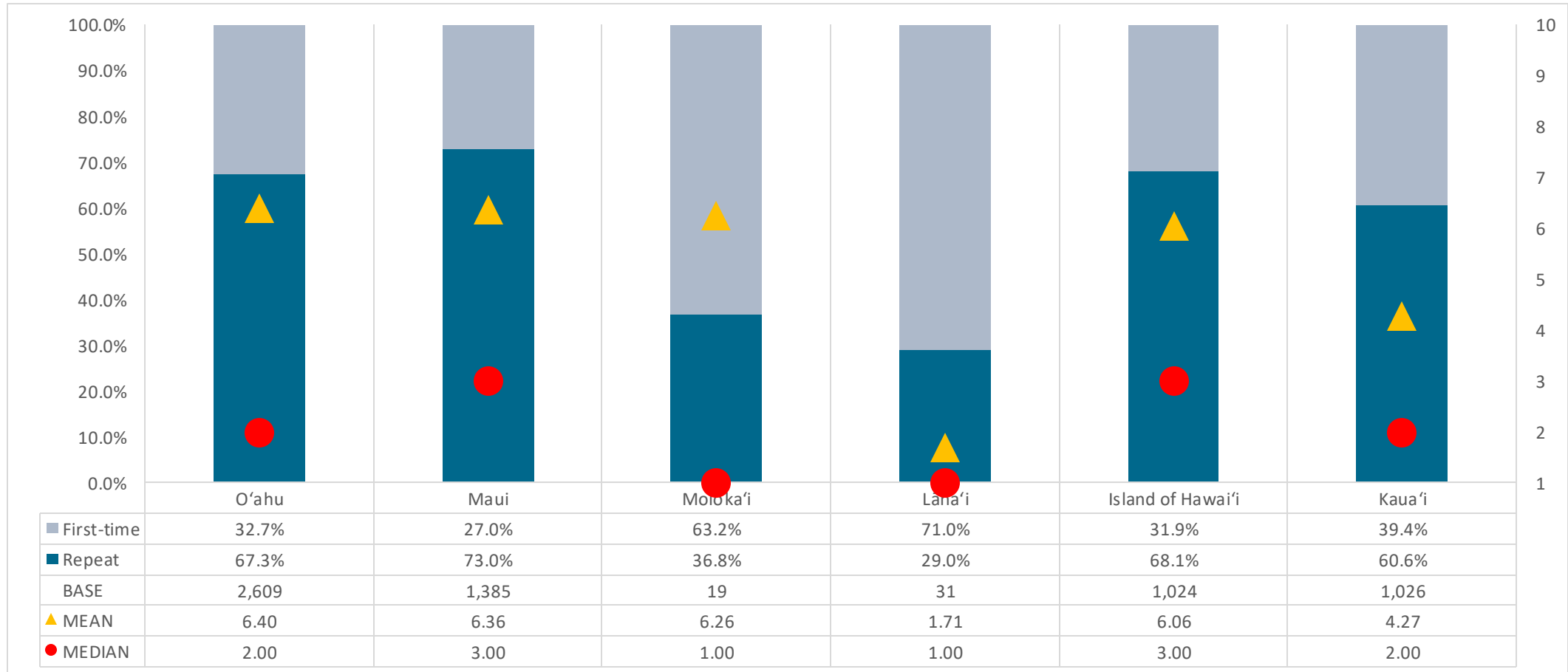
IMPACT OF HAWAIIAN CULTURAL EVENTS – U.S. WEST



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



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

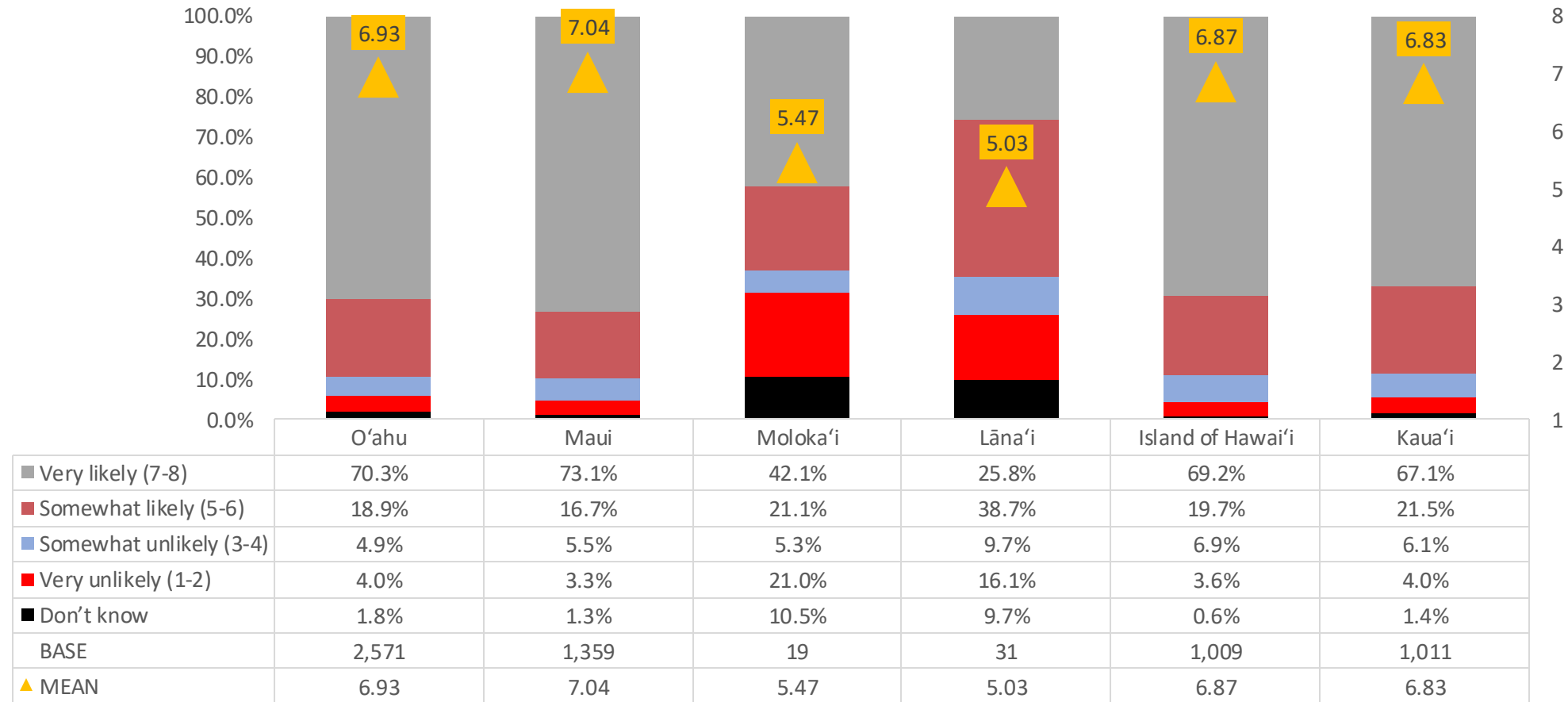


TRAVEL PARTY MEMBERS - U.S. WEST

	2016	2017	2018	2019	2020	2021	2022	2023	2024
My spouse	63.3%	64.5%	61.1%	60.8%	51.5%	58.4%	60.7%	59.5%	58.0%
Other adult members of my family	28.8%	29.1%	29.9%	28.7%	22.1%	29.0%	29.5%	29.7%	29.3%
My child(ren)/ grand child(ren) under 18	25.4%	22.9%	27.6%	25.2%	22.8%	27.9%	29.5%	28.1%	27.3%
My friends/ associates	16.5%	15.9%	15.7%	16.2%	15.5%	18.5%	16.0%	15.1%	15.5%
Myself only (traveled alone/ no one else)	10.7%	9.0%	9.0%	8.7%	17.2%	8.5%	8.2%	9.4%	9.8%
My girlfriend/ boyfriend	6.4%	5.5%	7.1%	7.6%	8.9%	8.4%	7.0%	7.1%	7.0%
Same-gender partner	0.6%	1.1%	1.2%	1.6%	1.1%	1.1%	1.1%	1.0%	1.1%

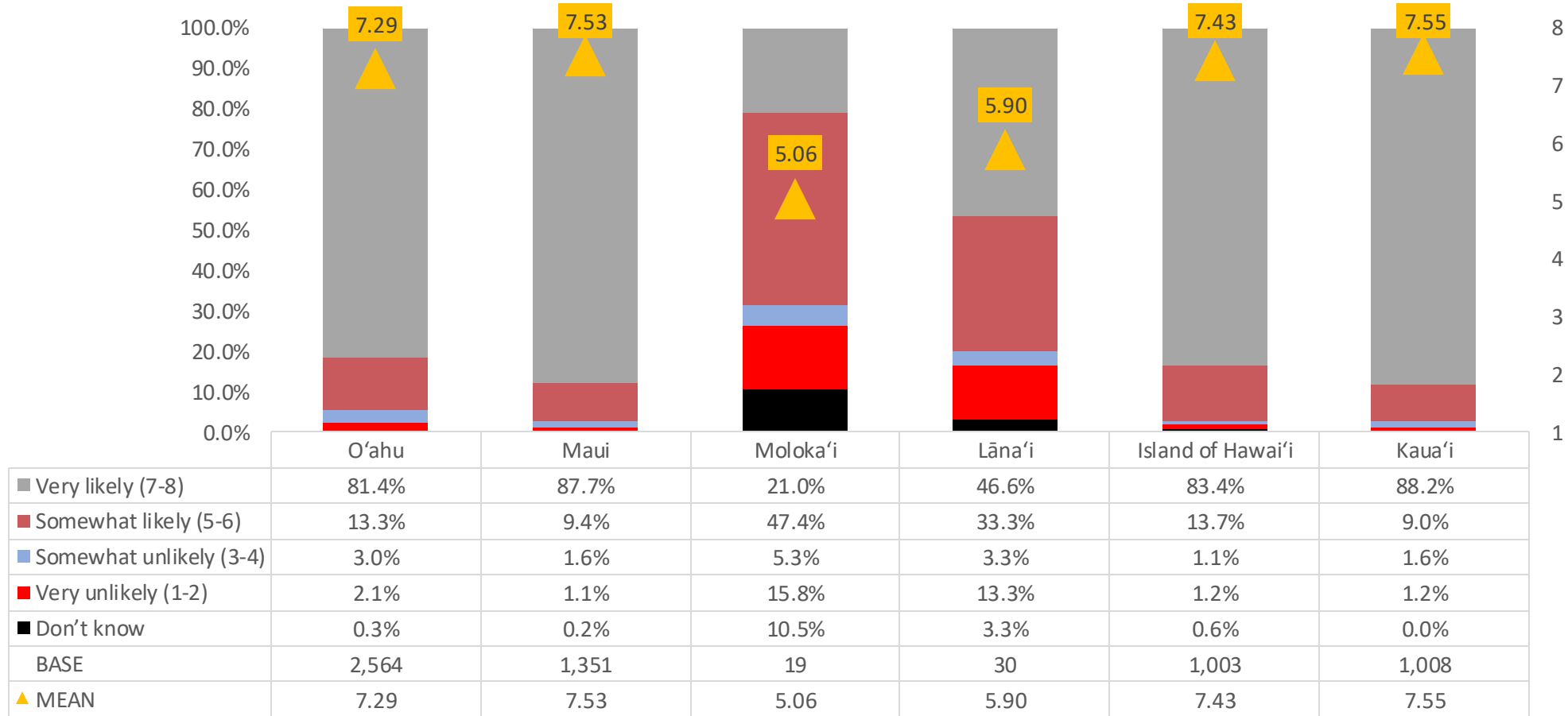
LIKELIHOOD OF RETURN VISIT - U.S. WEST

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



BRAND/ DESTINATION ADVOCACY – U.S. WEST

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



ACTIVITIES - SIGHTSEEING - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.0%	97.9%	94.5%	96.5%	97.9%	98.8%
On own (self-guided)/ driving around the island	78.4%	87.3%	77.7%	37.9%	88.4%	89.1%
Helicopter ride/ airplane tour	1.2%	2.1%	11.1%	3.4%	2.3%	7.8%
Boat tour/ submarine ride/ whale watching	17.3%	30.6%	5.5%	27.6%	27.1%	26.0%
Visiting towns/ communities	43.8%	55.6%	33.3%	31.0%	59.1%	67.1%
Private limousine/ van tour/ tour bus	10.4%	3.9%	0.0%	10.3%	5.3%	3.1%
Scenic views/ natural landmarks	52.1%	56.7%	44.4%	34.5%	63.4%	72.1%
Movie and TV filming location tours	8.8%	0.5%	0.0%	0.0%	0.6%	3.9%

ACTIVITIES - SIGHTSEEING - U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	96.7%	95.8%	95.0%	91.6%	94.8%	97.2%	97.5%	97.2%
On own (self-guided)/ driving around the island	86.7%	85.1%	83.2%	81.8%	83.0%	84.9%	84.1%	84.3%
Helicopter ride/ airplane tour	8.7%	6.6%	5.9%	2.8%	3.3%	3.3%	3.0%	2.8%
Boat tour/ submarine ride/ whale watching	29.8%	25.9%	24.5%	20.9%	27.8%	27.0%	25.8%	24.1%
Visiting towns/ communities	34.6%	56.3%	53.9%	45.4%	50.7%	54.6%	54.3%	53.5%
Private limousine/ van tour/ tour bus	9.5%	7.8%	7.5%	3.0%	5.9%	7.2%	7.4%	6.9%
Scenic views/ natural landmarks	70.3%	61.4%	58.9%	52.3%	59.4%	60.5%	59.9%	59.0%
Movie and TV filming location tours	5.4%	4.1%	4.2%	3.0%	4.2%	4.8%	4.8%	4.8%

ACTIVITIES - RECREATION - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	94.1%	96.9%	77.8%	86.2%	96.6%	96.9%
Beach/ sunbathing	82.6%	88.0%	55.5%	51.7%	81.6%	84.7%
Bodyboarding	6.9%	11.2%	5.5%	0.0%	9.3%	12.9%
Stand-up paddle boarding	4.3%	3.4%	5.5%	0.0%	5.0%	2.9%
Surfing	6.5%	4.5%	0.0%	0.0%	3.3%	8.0%
Canoe paddling	1.2%	1.0%	0.0%	0.0%	2.0%	1.1%
Kayaking	2.8%	2.3%	11.1%	0.0%	3.5%	10.5%
Swimming in the ocean	57.9%	68.1%	44.4%	44.8%	63.5%	62.3%
Snorkeling	29.3%	51.1%	22.2%	48.3%	49.9%	44.3%
Freediving	1.6%	2.1%	0.0%	3.4%	1.7%	1.1%
Windsurfing/ kitesurfing	0.2%	0.5%	0.0%	0.0%	0.1%	0.2%
Jet skiing/ parasailing	1.7%	2.1%	0.0%	0.0%	1.1%	0.0%
Scuba diving	1.4%	3.8%	0.0%	10.3%	3.1%	1.5%
Fishing	1.9%	1.5%	0.0%	0.0%	3.8%	3.1%
Golf	3.4%	9.5%	0.0%	0.0%	9.4%	9.5%

ACTIVITIES – RECREATION – U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	96.5%	97.0%	96.4%	93.7%	97.8%	97.7%	97.0%	96.1%
Beach/ sunbathing	85.3%	85.5%	84.7%	82.6%	88.6%	88.0%	85.2%	85.0%
Bodyboarding	20.3%	17.0%	14.0%	14.7%	14.0%	12.1%	10.4%	9.6%
Stand-up paddle boarding	*	*	*	8.2%	7.4%	6.6%	5.3%	4.1%
Surfing	7.1%	6.7%	6.3%	10.3%	8.4%	6.9%	6.2%	5.9%
Canoe paddling	10.2%	8.7%	8.0%	7.0%	8.5%	7.0%	6.4%	1.3%
Kayaking	**	**	**	**	**	**	**	4.3%
Swimming in the ocean	NA	68.3%	67.7%	66.5%	72.6%	69.2%	67.1%	63.0%
Snorkeling	NA	49.9%	48.1%	47.9%	52.3%	46.5%	44.1%	41.3%
Freediving	NA	NA	NA	2.1%	1.8%	1.9%	1.7%	1.7%
Windsurfing/ kitesurfing	0.4%	0.2%	0.3%	0.3%	0.3%	0.2%	0.1%	0.3%
Jet skiing/ parasailing	2.4%	2.3%	1.8%	1.4%	1.9%	1.6%	1.1%	1.5%
Scuba diving	4.1%	3.1%	3.4%	4.0%	3.1%	2.3%	2.6%	2.3%
Fishing	3.7%	3.4%	3.5%	3.9%	3.1%	2.9%	2.8%	2.4%
Golf	9.1%	7.4%	6.9%	8.3%	8.1%	6.3%	6.5%	7.0%

* Combined with bodyboarding

** Combined with canoe paddling

ACTIVITIES - RECREATION - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	94.1%	96.9%	77.8%	86.2%	96.6%	96.9%
Running/ jogging/ fitness walking	26.1%	36.5%	16.6%	3.4%	27.4%	30.7%
Cycling	1.7%	1.5%	0.0%	0.0%	2.8%	5.6%
Spa	6.5%	10.8%	5.5%	3.4%	6.6%	5.7%
Hiking	34.4%	39.3%	22.2%	27.6%	46.5%	49.3%
Backpacking/ camping	0.7%	1.0%	0.0%	0.0%	1.3%	1.5%
Agritourism	11.0%	9.5%	22.2%	6.9%	17.9%	11.4%
Sports event or tournament	2.9%	0.7%	0.0%	0.0%	2.3%	0.9%
Parks/ botanical gardens	32.5%	31.3%	16.6%	6.9%	40.4%	36.2%
Waterparks	2.4%	1.7%	0.0%	0.0%	0.9%	0.9%
Mountain tubing/ waterfall rappel	0.4%	0.5%	0.0%	0.0%	0.7%	10.8%
Zip-lining	2.5%	5.2%	0.0%	0.0%	4.2%	5.7%
Skydiving	0.3%	0.0%	0.0%	0.0%	0.1%	0.1%
All-terrain vehicle (ATV)	4.1%	1.1%	0.0%	0.0%	1.0%	2.8%
Horseback riding	1.0%	0.7%	0.0%	0.0%	1.1%	0.7%

ACTIVITIES - RECREATION - U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	96.5%	97.0%	96.4%	93.7%	97.8%	97.7%	97.0%	96.1%
Running/ jogging/ fitness walking	35.5%	30.8%	26.3%	38.8%	34.3%	28.9%	27.7%	30.0%
Cycling	NA	NA	NA	NA	NA	3.0%	2.8%	2.6%
Spa	9.2%	10.1%	9.6%	6.3%	8.8%	8.9%	8.3%	7.6%
Hiking	28.5%	32.4%	47.0%	45.5%	47.7%	46.3%	42.7%	40.6%
Backpacking/ camping	*	*	1.8%	1.8%	1.4%	1.7%	1.3%	1.0%
Agritourism	9.9%	13.6%	13.5%	8.1%	10.5%	12.3%	12.4%	12.2%
Sports event or tournament	1.9%	2.8%	2.8%	0.8%	0.6%	1.4%	1.9%	2.0%
Parks/ botanical gardens	40.7%	38.2%	35.4%	26.9%	33.1%	37.0%	36.6%	34.6%
Waterparks	NA	1.5%	1.4%	0.8%	1.2%	1.5%	1.6%	1.8%
Mountain tubing/ waterfall rappel	NA	2.0%	2.3%	1.3%	1.4%	1.6%	2.5%	2.4%
Zip-lining	NA	6.0%	6.1%	3.2%	4.7%	4.6%	4.2%	4.1%
Skydiving	NA	0.4%	0.6%	0.4%	0.4%	0.3%	0.2%	0.2%
All-terrain vehicle (ATV)	NA	2.9%	3.0%	2.7%	4.1%	3.3%	3.2%	2.8%
Horseback riding	NA	2.3%	2.1%	1.8%	1.7%	1.2%	1.4%	0.9%

* Combined with Hiking

ACTIVITIES - ENTERTAINMENT & DINING - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	97.7%	98.6%	77.8%	82.7%	97.6%	97.8%
Lunch/ sunset/ dinner/ evening cruise	20.7%	23.3%	5.5%	37.9%	19.4%	19.0%
Live music/ stage show	30.8%	26.2%	22.2%	0.0%	23.7%	22.9%
Nightclub/ dancing/ bar/ karaoke	9.4%	5.8%	5.5%	0.0%	5.4%	3.5%
Fine dining	41.9%	52.1%	16.6%	13.8%	42.4%	43.9%
Family restaurant	60.6%	61.2%	38.9%	24.1%	64.2%	64.0%
Fast food	40.8%	23.9%	5.5%	0.0%	24.8%	21.8%
Food truck	46.7%	49.5%	27.7%	0.0%	28.9%	46.9%
Café/ coffee house	50.1%	53.9%	16.6%	17.2%	55.0%	54.1%
Ethnic dining	29.5%	20.8%	5.5%	0.0%	22.8%	23.4%
Farm-to-table cuisine	13.8%	22.6%	11.1%	13.8%	19.9%	18.7%
Prepared own meal	29.2%	55.8%	50.0%	10.3%	55.9%	57.6%

ACTIVITIES - ENTERTAINMENT & DINING - U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	98.9%	98.4%	98.1%	97.7%	99.1%	99.3%	99.3%	97.9%
Lunch/ sunset/ dinner/ evening cruise	27.3%	23.0%	20.9%	16.4%	21.2%	22.8%	22.0%	21.4%
Live music/ stage show	31.6%	32.2%	30.3%	12.2%	20.4%	29.4%	28.5%	27.9%
Nightclub/ dancing/ bar/ karaoke	9.3%	9.4%	8.9%	4.7%	6.3%	7.4%	7.3%	7.1%
Fine dining	53.2%	53.6%	53.1%	44.0%	53.1%	48.4%	47.1%	45.2%
Family restaurant	70.8%	62.8%	61.8%	55.5%	61.1%	63.7%	62.5%	62.5%
Fast food	39.4%	36.5%	34.7%	37.4%	38.6%	36.3%	33.9%	31.2%
Food truck	NA	30.7%	30.6%	36.1%	40.9%	43.7%	42.8%	45.0%
Café/ coffee house	42.5%	46.6%	46.0%	41.6%	48.1%	51.4%	51.1%	53.1%
Ethnic dining	30.5%	31.9%	31.9%	23.2%	26.4%	27.9%	27.6%	25.8%
Farm-to-table cuisine	NA	NA	NA	NA	NA	17.2%	17.1%	18.0%
Prepared own meal	52.2%	55.1%	52.1%	64.6%	56.5%	49.0%	47.3%	45.7%

ACTIVITIES - SHOPPING - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	94.6%	96.9%	72.2%	48.3%	95.2%	94.9%
Malls/ department stores	55.7%	44.6%	0.0%	0.0%	27.3%	23.6%
Designer boutiques	16.8%	17.7%	0.0%	13.8%	13.4%	15.8%
Hotel/ resort stores	38.9%	34.3%	11.1%	10.3%	27.9%	22.6%
Swap meet/ flea market	19.2%	18.9%	16.7%	0.0%	15.9%	8.2%
Discount/ outlet stores	12.9%	13.0%	0.0%	0.0%	10.7%	9.5%
Supermarkets	45.3%	67.9%	44.4%	10.3%	66.6%	68.4%
Farmer's market	25.0%	38.6%	16.6%	3.4%	55.7%	46.7%
Convenience stores	53.6%	51.2%	33.3%	13.8%	42.9%	44.3%
Duty-free stores	7.6%	3.6%	5.6%	0.0%	1.3%	2.0%
Hawai'i-made products	42.3%	47.7%	27.7%	17.2%	46.2%	49.1%
Local shops and artisans	43.6%	60.2%	38.8%	37.9%	58.0%	68.2%
Local fashion designers	6.3%	7.0%	0.0%	10.3%	7.2%	9.9%

ACTIVITIES - SHOPPING - U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	97.0%	96.7%	95.9%	92.9%	97.1%	97.9%	97.2%	95.6%
Malls/ department stores	43.6%	42.4%	42.0%	34.8%	40.0%	44.2%	42.5%	43.6%
Designer boutiques	22.3%	17.5%	17.3%	13.9%	17.0%	17.9%	17.2%	16.7%
Hotel/ resort stores	33.0%	33.5%	33.1%	21.4%	32.7%	34.6%	34.4%	33.8%
Swap meet/ flea market	22.8%	17.4%	16.7%	10.2%	14.8%	17.4%	16.8%	17.1%
Discount/ outlet stores	20.9%	17.3%	15.9%	13.1%	13.0%	14.7%	14.1%	12.3%
Supermarkets	58.1%	68.2%	66.1%	71.8%	71.0%	65.2%	62.6%	58.8%
Farmer's market	33.0%	37.2%	37.0%	30.8%	35.2%	36.9%	36.8%	37.6%
Convenience stores	42.9%	46.5%	46.9%	44.2%	51.7%	51.5%	51.2%	50.2%
Duty-free stores	3.1%	3.7%	3.8%	1.7%	2.8%	4.2%	4.0%	4.8%
Hawai'i-made products	NA	NA	NA	NA	NA	47.9%	46.6%	46.0%
Local shops and artisans	68.4%	65.7%	64.7%	54.1%	62.8%	60.1%	59.4%	54.8%
Local fashion designers	NA	NA	NA	NA	NA	NA	NA	7.5%

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

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	72.5%	59.1%	49.9%	34.5%	67.9%	61.5%
Historic military sites and museums	35.3%	3.9%	11.1%	3.4%	9.3%	6.1%
Historic Hawaiian sites and museums	29.0%	21.4%	38.8%	20.7%	44.7%	29.1%
Other historical sites, museums, and homes	13.4%	8.2%	11.1%	6.9%	18.0%	13.3%
Art museums	4.2%	2.0%	0.0%	0.0%	2.5%	1.8%
Art galleries and exhibitions	5.3%	9.8%	0.0%	6.9%	10.9%	7.9%
Lū'au/ Polynesian show/ hula show	32.1%	19.3%	5.5%	0.0%	15.1%	21.5%
Lesson- e.g. ukulele, hula, canoe, lei making	6.4%	4.9%	5.5%	0.0%	3.2%	3.9%
Play/ concert/ theatre	3.8%	2.6%	0.0%	0.0%	2.2%	1.7%
Art/ craft fair	5.8%	16.0%	11.1%	0.0%	13.9%	15.6%
Festival/ event	7.3%	3.4%	11.1%	3.4%	4.5%	3.0%

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

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	74.1%	71.8%	68.7%	45.0%	60.4%	69.0%	69.3%	66.9%
Historic military sites and museums	27.5%	18.6%	15.6%	12.2%	16.8%	17.9%	18.7%	18.8%
Historic Hawaiian sites and museums	NA	NA	NA	NA	28.4%	30.0%	31.7%	30.4%
Other historical sites, museums, and homes	30.9%	29.2%	26.8%	19.9%	11.8%	12.8%	13.3%	13.3%
Art museums	*	*	*	*	2.1%	3.3%	2.8%	3.1%
Art galleries and exhibitions	*	*	*	*	9.1%	11.0%	10.4%	7.9%
Lū'au/ Polynesian show/ hula show	37.3%	32.0%	29.4%	8.0%	19.8%	27.8%	26.1%	25.0%
Lesson- e.g. ukulele, hula, canoe, lei making	4.8%	7.1%	6.8%	2.7%	3.1%	4.5%	5.1%	5.3%
Play/ concert/ theatre	4.5%	4.7%	4.5%	1.2%	1.1%	2.7%	3.0%	3.0%
Art/ craft fair	14.4%	15.0%	14.6%	6.9%	7.9%	11.3%	11.8%	11.4%
Festival/ event	10.1%	5.3%	5.6%	4.9%	2.7%	3.9%	5.8%	5.3%

* Combined Museum/ Art galleries as single option

ACTIVITIES – TRANSPORTATION – U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	90.5%	93.6%	61.1%	41.4%	91.6%	93.9%
Airport shuttle	12.3%	7.4%	0.0%	6.9%	14.7%	14.0%
Trolley	3.5%	0.0%	0.0%	0.0%	0.8%	0.8%
Public bus	8.0%	1.6%	16.6%	0.0%	1.9%	1.0%
Tour bus/ tour van	10.7%	3.4%	5.6%	3.4%	4.5%	4.8%
Taxi/ limo	9.2%	3.3%	5.5%	10.4%	4.6%	2.3%
Rental car	57.8%	83.6%	38.8%	17.2%	80.2%	82.7%
Ride share	33.1%	11.7%	0.0%	3.4%	10.5%	4.3%
Car share	4.7%	3.2%	11.1%	0.0%	3.6%	6.6%
Bicycle rental	1.6%	1.4%	0.0%	0.0%	1.2%	3.8%

ACTIVITIES – TRANSPORTATION – U.S. WEST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	95.1%	92.8%	92.3%	84.9%	91.8%	93.9%	93.6%	91.8%
Airport shuttle	19.6%	18.4%	15.6%	9.1%	14.4%	14.1%	13.4%	12.1%
Trolley	2.5%	2.3%	2.8%	1.3%	1.6%	3.3%	2.8%	1.8%
Public bus	5.2%	4.4%	3.9%	2.4%	4.1%	4.4%	4.2%	4.4%
Tour bus/ tour van	9.7%	8.9%	8.7%	2.8%	5.4%	6.9%	7.2%	7.1%
Taxi/ limo	13.4%	7.6%	6.2%	5.2%	10.0%	7.3%	6.5%	6.0%
Rental car	82.8%	80.0%	79.3%	74.8%	77.8%	74.5%	74.1%	72.1%
Ride share	NA	12.1%	15.1%	13.1%	16.7%	17.2%	18.3%	19.6%
Car share	NA	NA	NA	NA	NA	6.8%	6.0%	4.6%
Bicycle rental	NA	2.7%	2.2%	2.6%	3.0%	2.7%	1.9%	1.9%

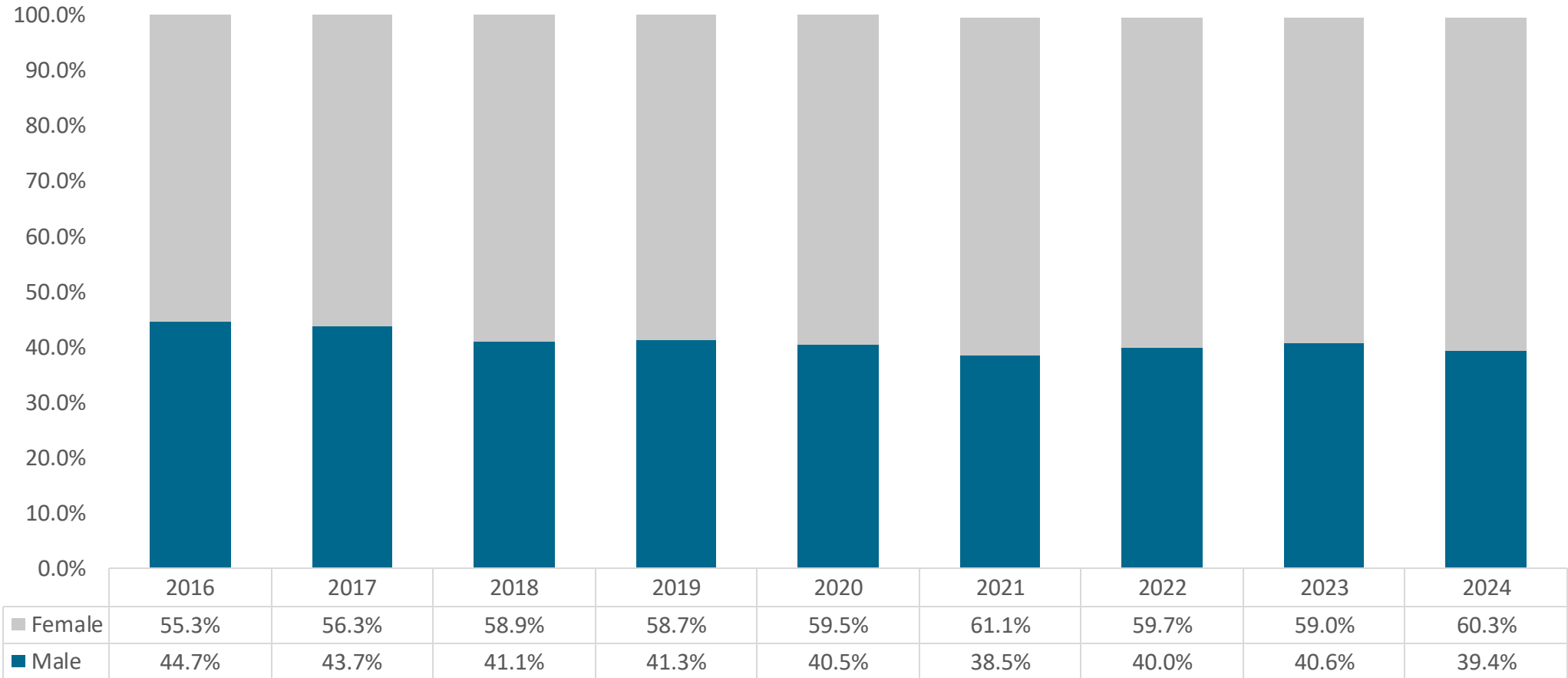
ACTIVITIES - OTHER - U.S. WEST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	35.4%	27.9%	22.2%	10.3%	33.8%	21.6%
Visiting friends/ relatives	34.1%	24.9%	22.2%	6.9%	32.9%	20.0%
Giving back to the local community	2.0%	4.1%	0.0%	3.4%	2.4%	2.1%

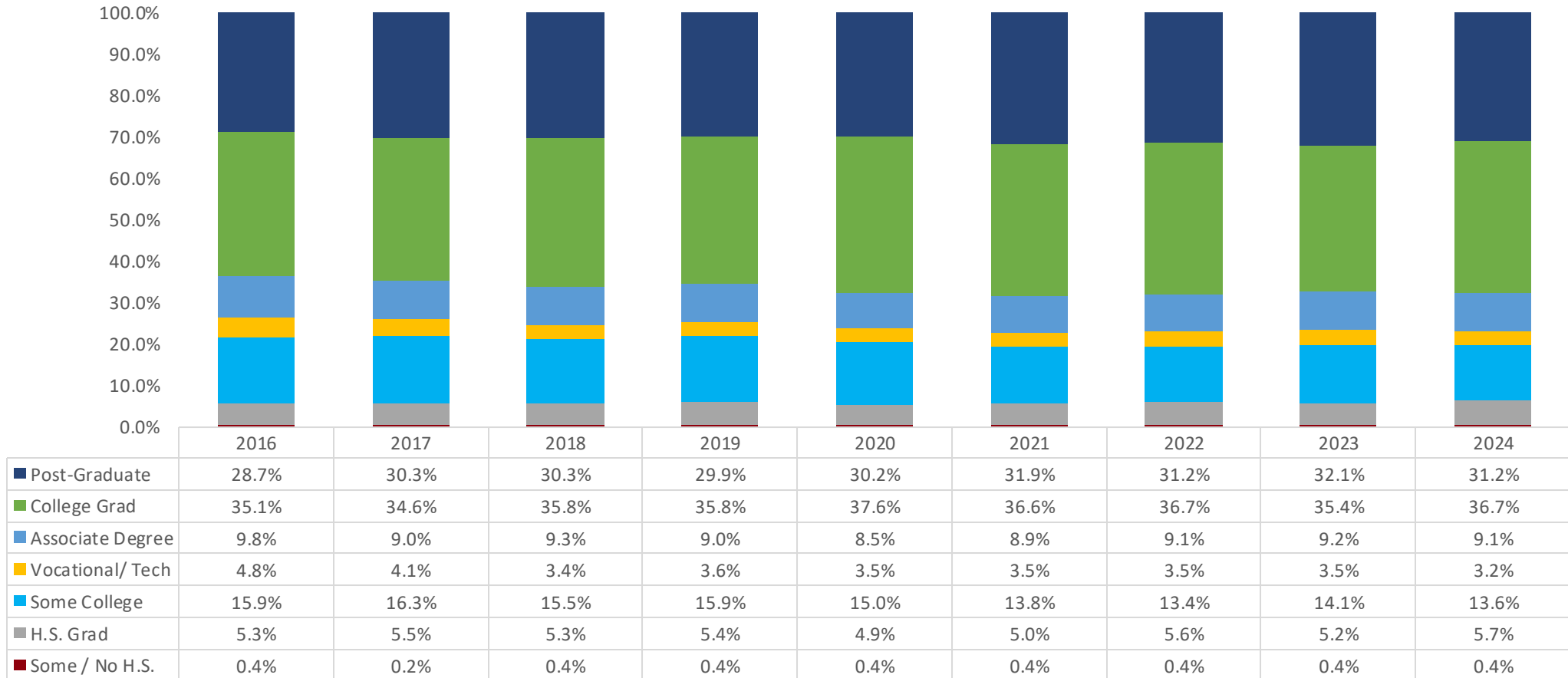
ACTIVITIES - OTHER - U.S. WEST

	2018	2019	2020	2021	2022	2023	2024
TOTAL	31.3%	29.7%	37.5%	31.7%	32.4%	34.2%	31.3%
Visiting friends/ relatives	30.5%	29.0%	37.0%	30.7%	30.3%	31.0%	29.7%
Giving back to the local community	1.5%	1.0%	1.0%	1.5%	2.9%	4.7%	2.6%

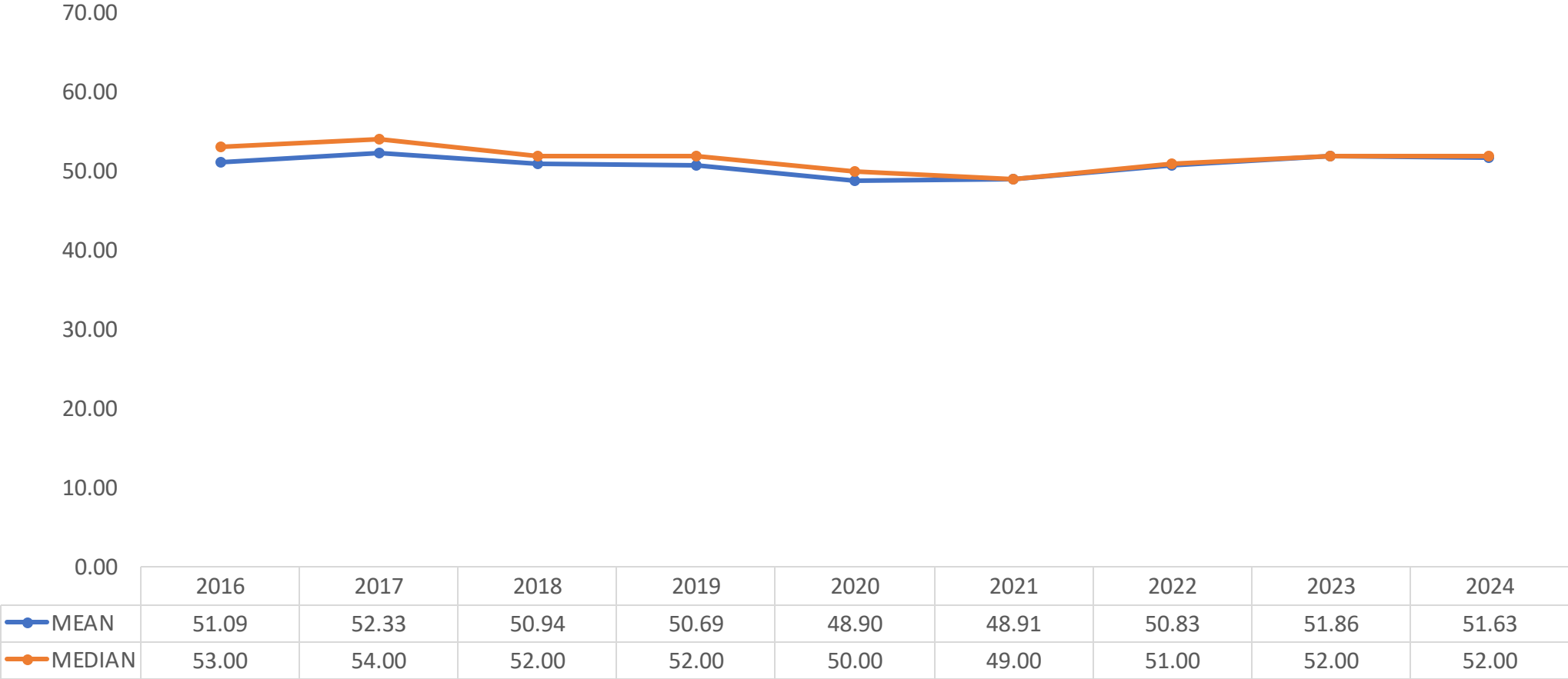
VISITOR PROFILE - GENDER - U.S. WEST



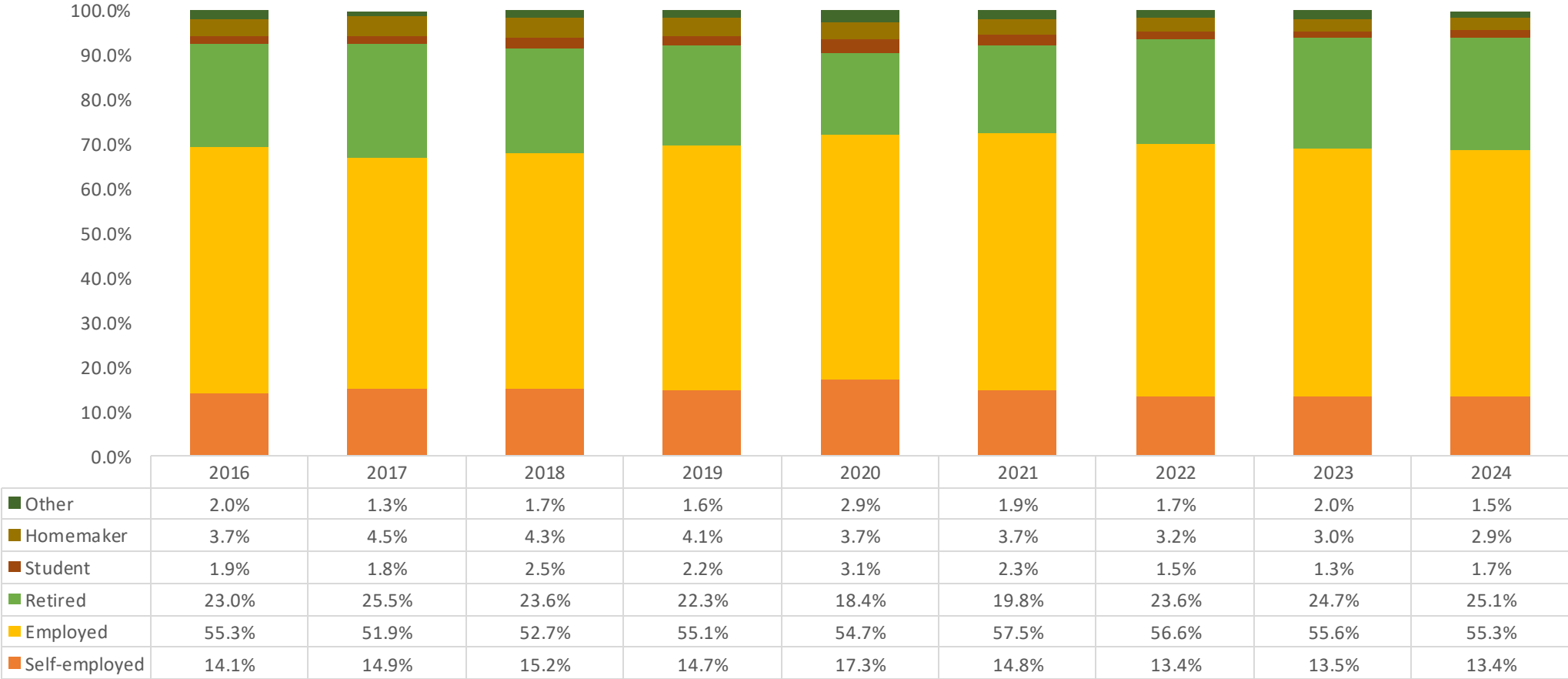
VISITOR PROFILE - EDUCATION - U.S. WEST



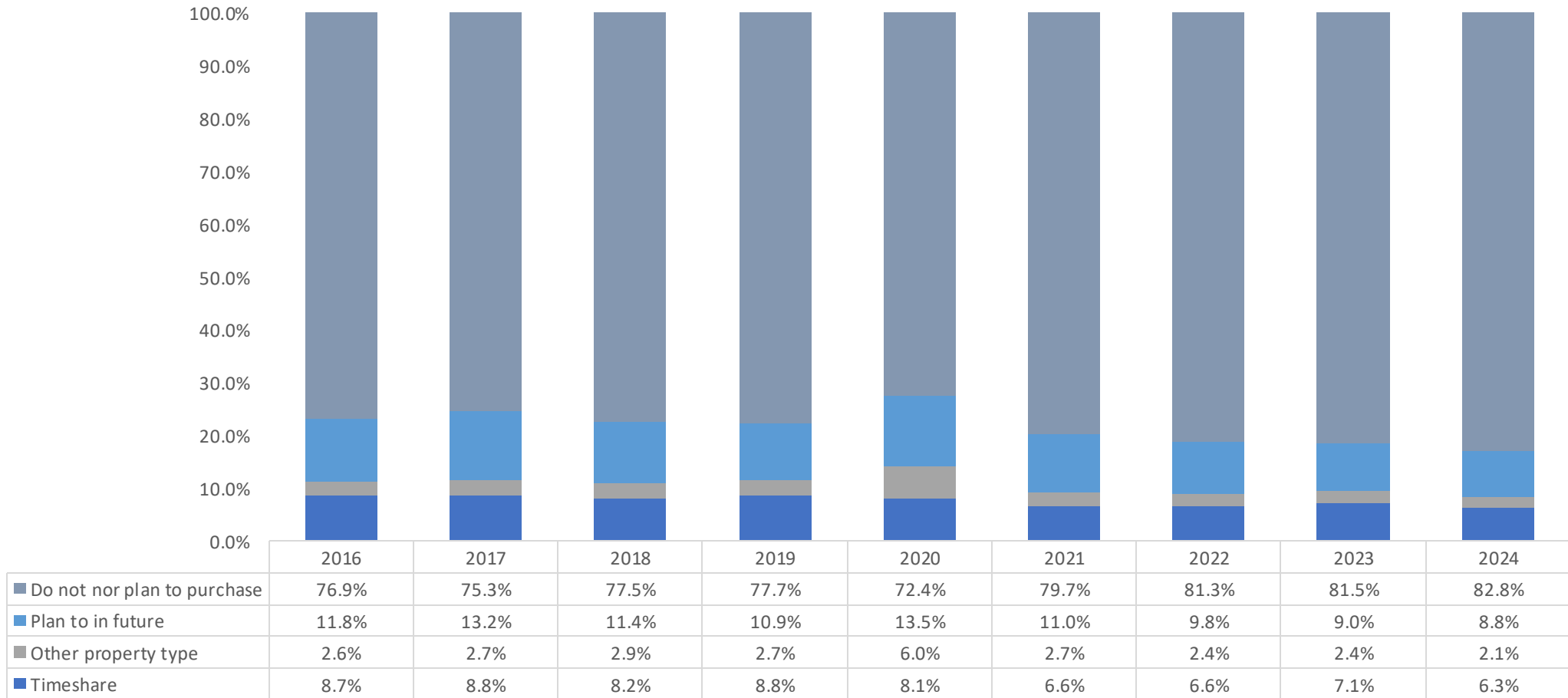
VISITOR PROFILE - AGE - U.S. WEST



VISITOR PROFILE - EMPLOYMENT STATUS - U.S. WEST



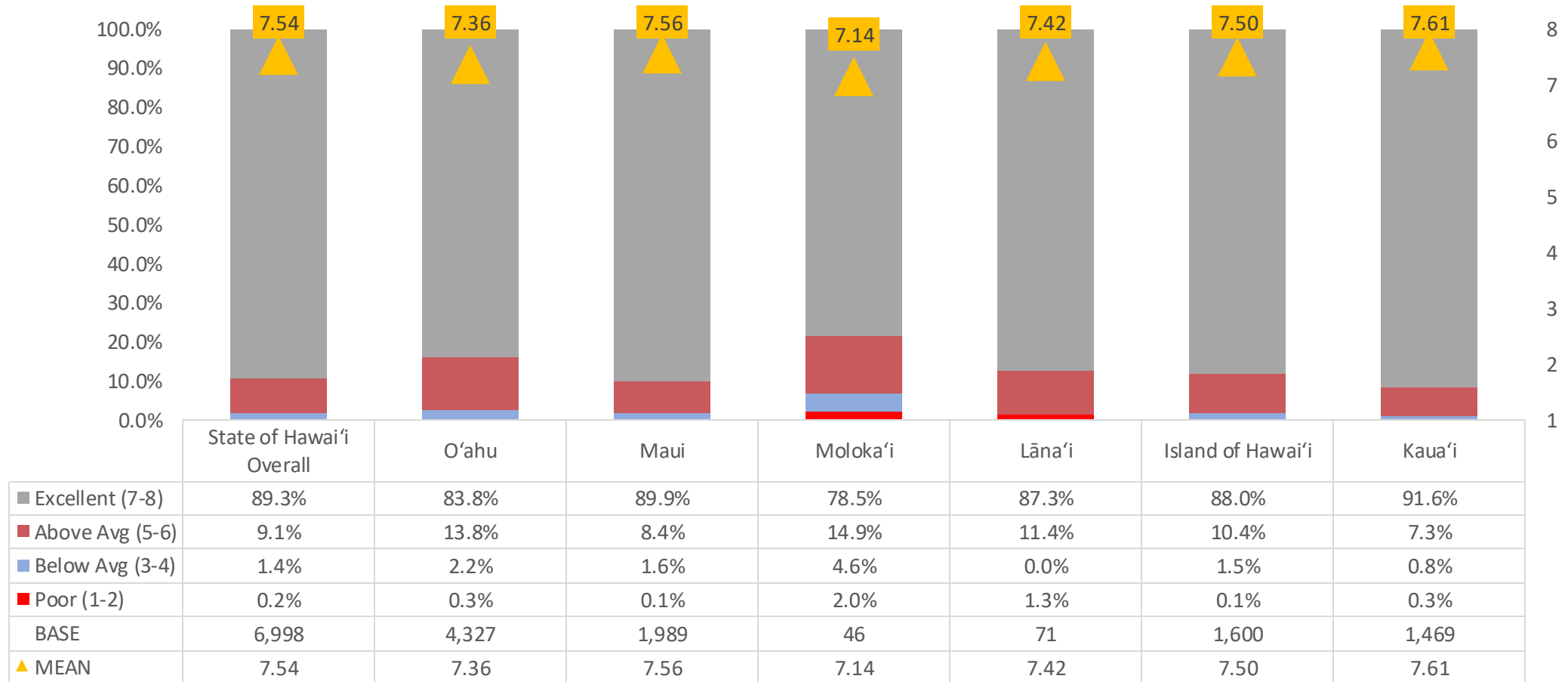
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - U.S. WEST



Section 14 – U.S. East

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

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



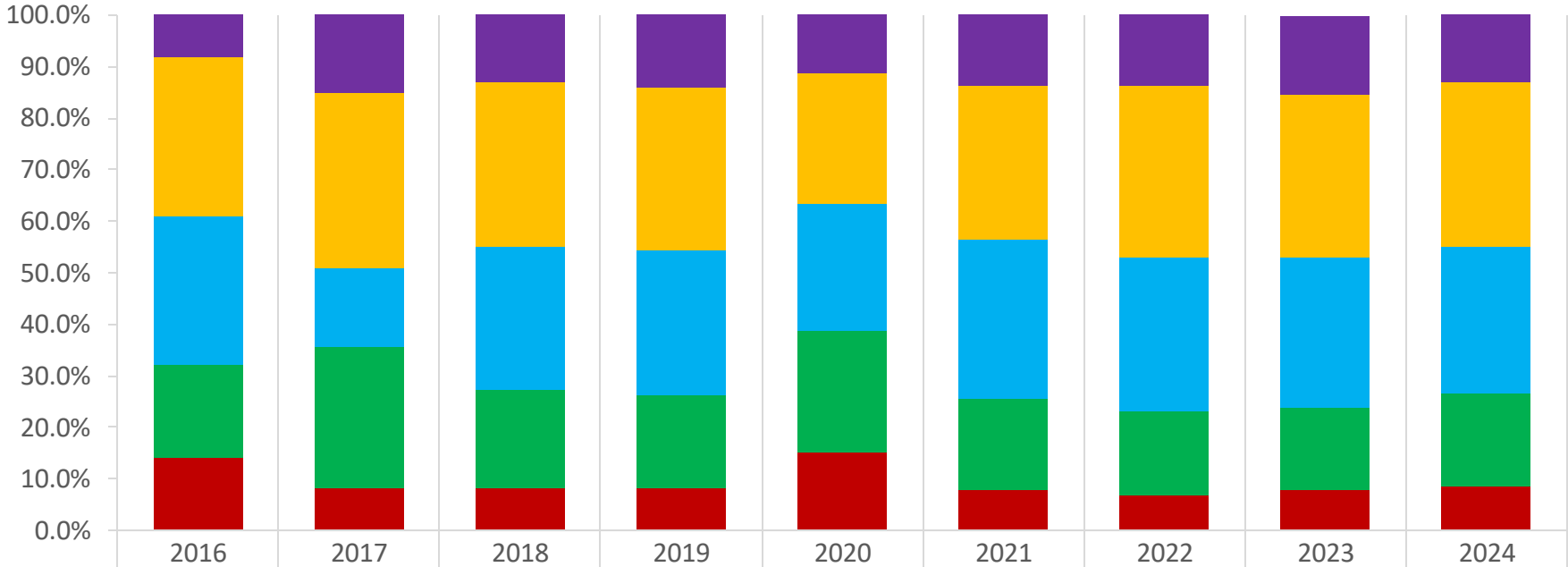
PRIMARY PURPOSE OF TRIP - U.S. EAST

	2018	2019	2020	2021	2022	2023	2024
Vacation	55.8%	56.2%	54.1%	68.8%	67.3%	64.9%	64.2%
Visit friends/ relatives	9.3%	8.6%	26.0%	14.3%	11.9%	13.0%	13.4%
Other business trip/ work in Hawai'i	4.7%	4.7%	4.3%	2.6%	2.6%	3.2%	4.1%
Anniversary/ birthday	9.0%	9.9%	2.2%	2.7%	3.7%	3.9%	3.8%
Honeymoon	3.8%	3.9%	2.9%	5.2%	3.8%	2.7%	2.5%
Convention/ conference	4.1%	2.9%	1.3%	0.6%	1.9%	2.9%	2.4%
Attend wedding/ vow renewal	2.8%	2.3%	0.5%	0.9%	1.7%	1.9%	1.5%
Government/ military	0.5%	0.3%	2.6%	0.7%	1.1%	1.4%	1.5%

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

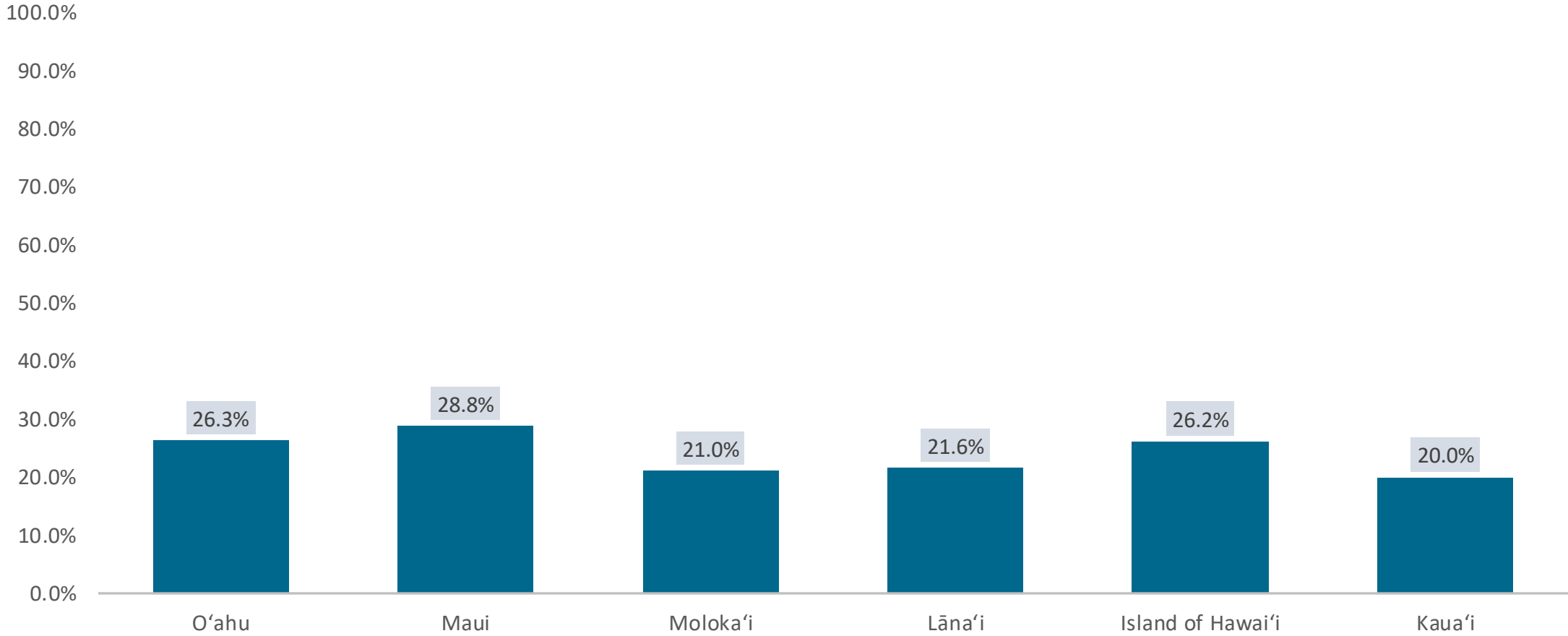
	2018	2019	2020	2021	2022	2023	2024
Vacation	82.6%	82.2%	76.7%	87.9%	87.3%	86.4%	84.3%
Visit friends/ relatives	16.1%	15.6%	33.6%	22.0%	18.8%	21.1%	20.8%
Anniversary/ birthday	16.0%	16.8%	3.7%	5.6%	6.6%	7.2%	6.7%
Other business trip/ work in Hawai'i	6.1%	6.1%	6.2%	4.1%	3.9%	4.5%	5.6%
Honeymoon	4.5%	4.6%	3.9%	6.3%	4.8%	3.6%	3.4%
Convention/ conference	5.1%	3.6%	1.7%	0.9%	2.5%	3.5%	3.0%

VACATION TRIP DESCRIPTION - U.S. EAST

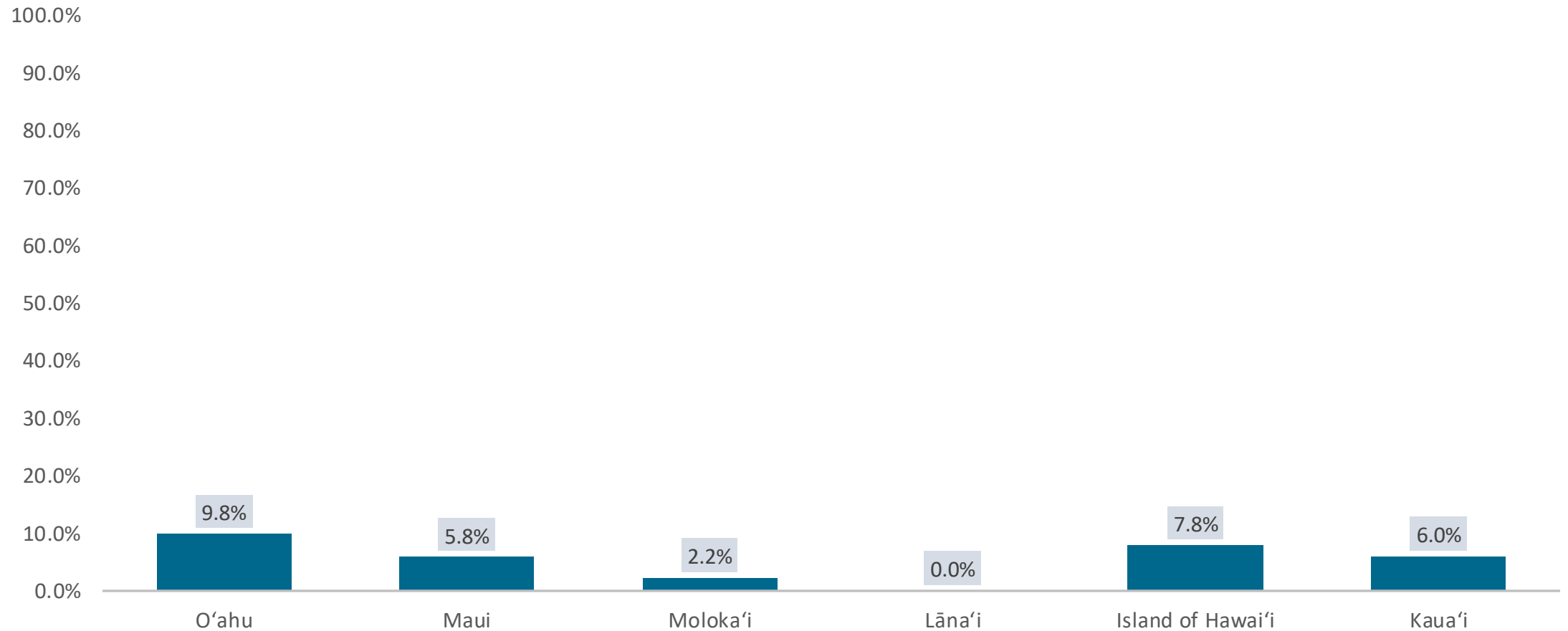


	2016	2017	2018	2019	2020	2021	2022	2023	2024
Once-in-a-lifetime	8.1%	15.0%	13.0%	14.0%	11.2%	13.7%	13.9%	15.3%	13.2%
Special occasion	31.1%	34.1%	32.1%	31.7%	25.3%	30.0%	33.1%	31.7%	31.7%
More special than most trips	28.7%	15.4%	27.7%	28.2%	24.7%	30.6%	30.0%	29.2%	28.6%
Annual/ Semi-annual trip	18.0%	27.2%	19.0%	17.8%	23.8%	17.9%	16.1%	16.0%	17.8%
Other	14.1%	8.3%	8.2%	8.3%	15.0%	7.8%	6.9%	7.7%	8.7%

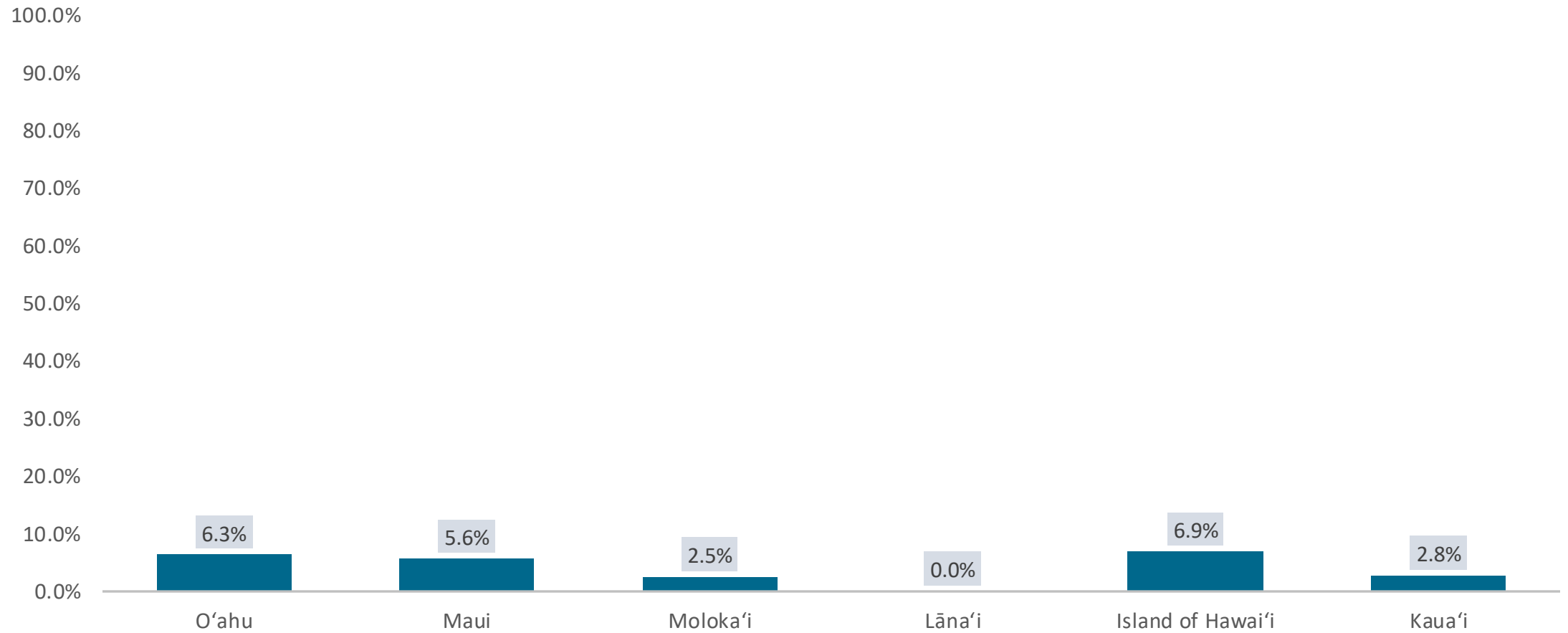
ADVERTISING AWARENESS - U.S. EAST



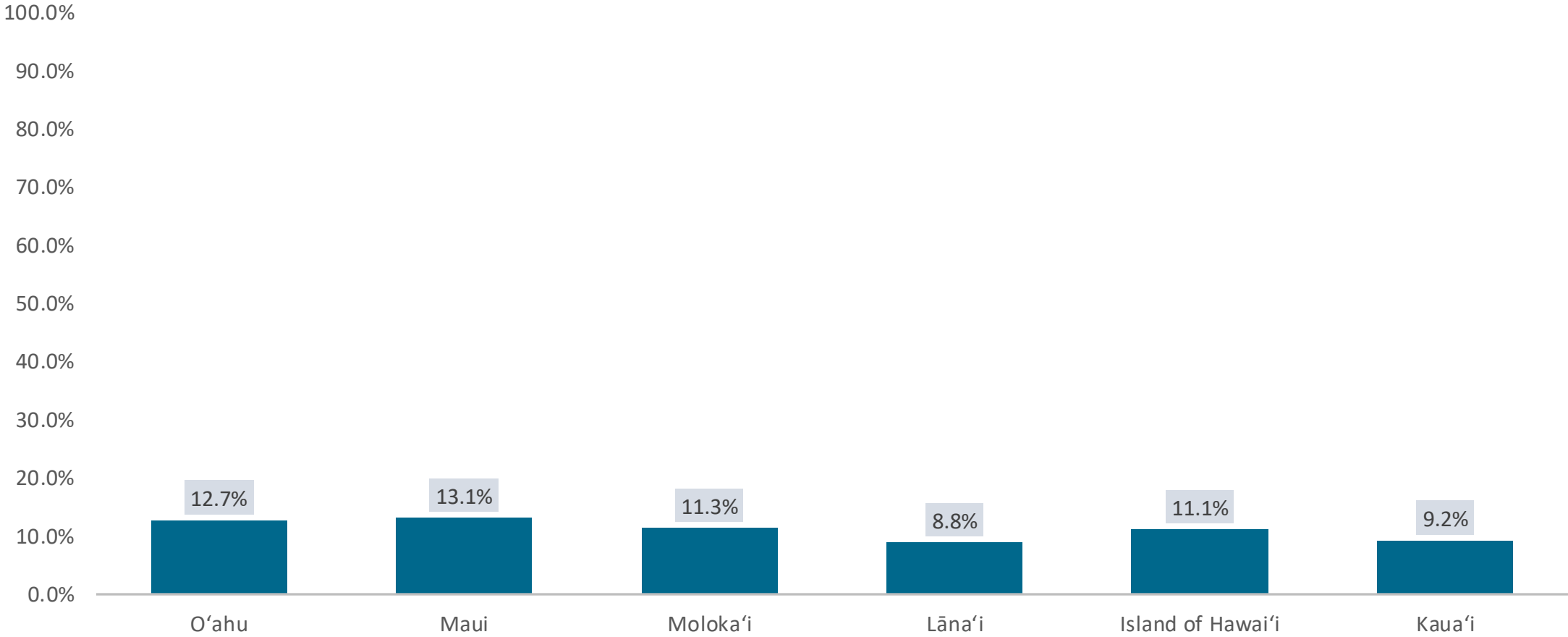
IMPACT OF LOCATION FILMING - U.S. EAST



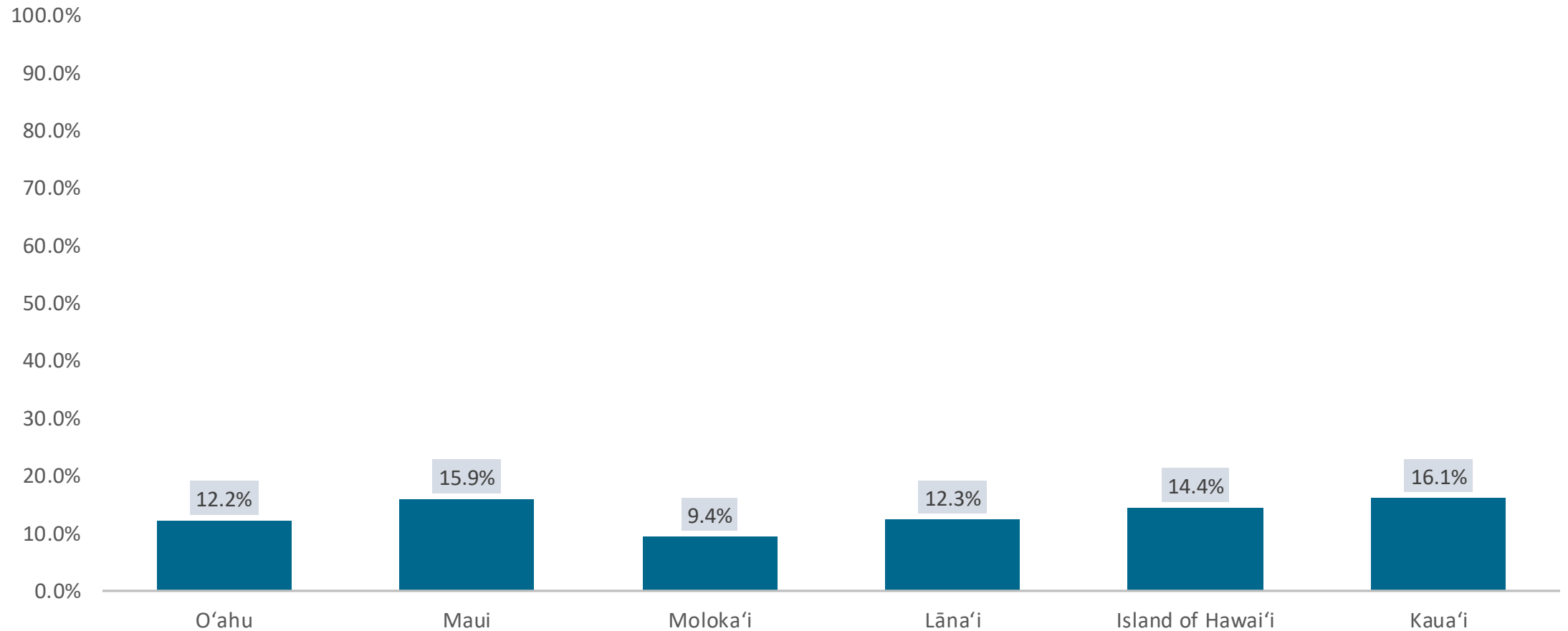
IMPACT OF HAWAIIAN MUSIC - U.S. EAST



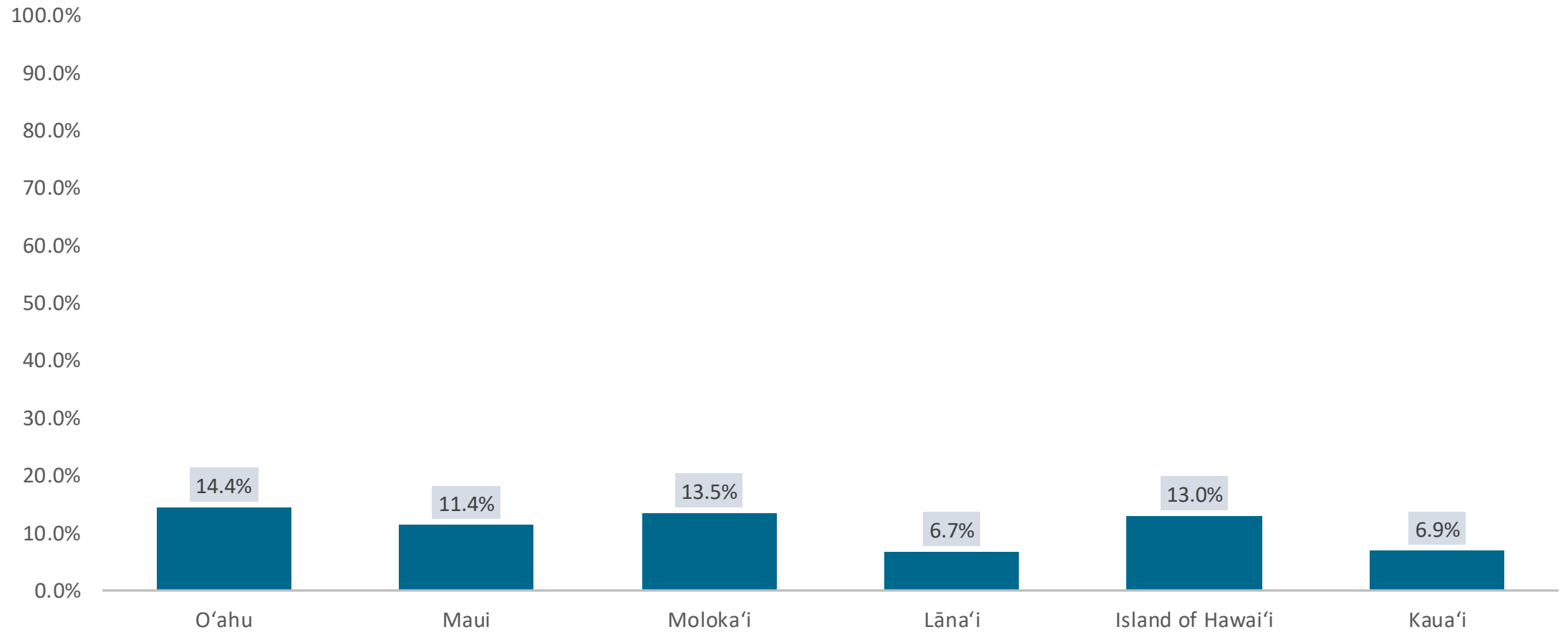
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - U.S. EAST



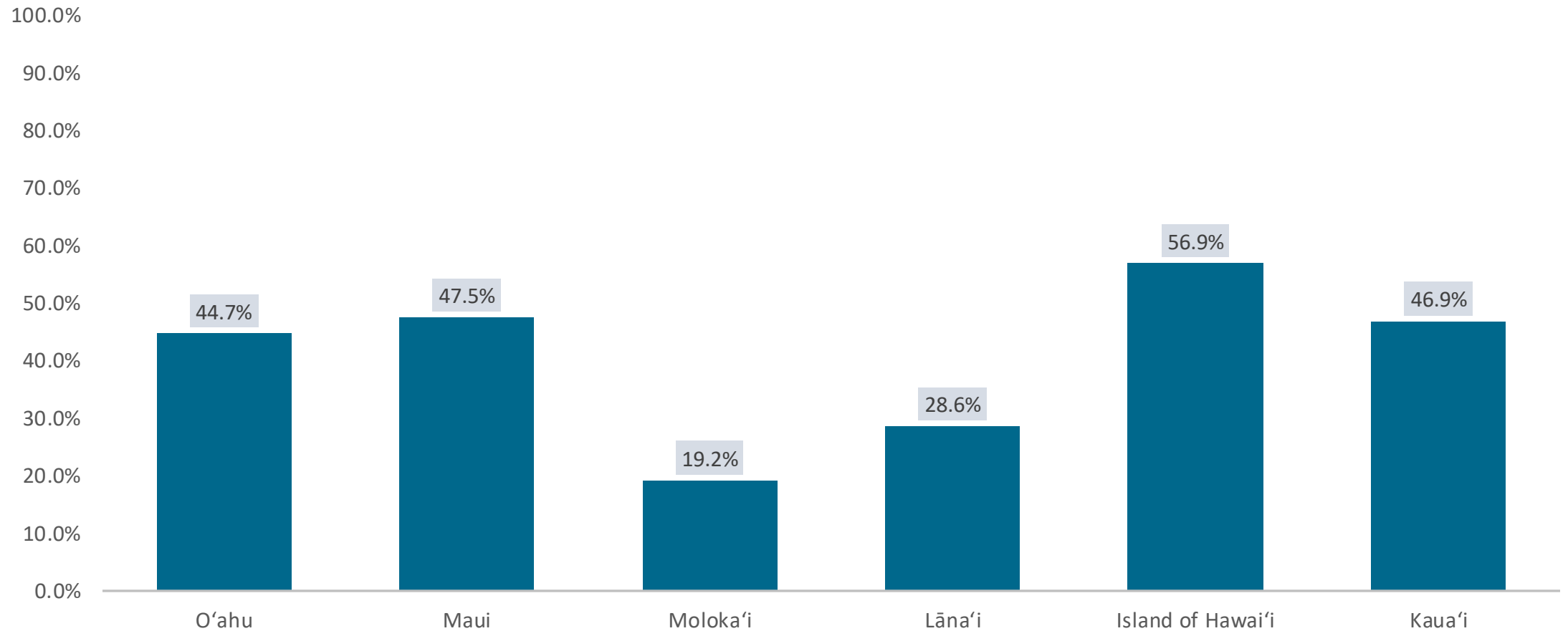
IMPACT OF OUTDOOR/ SPORTING EVENTS - U.S. EAST



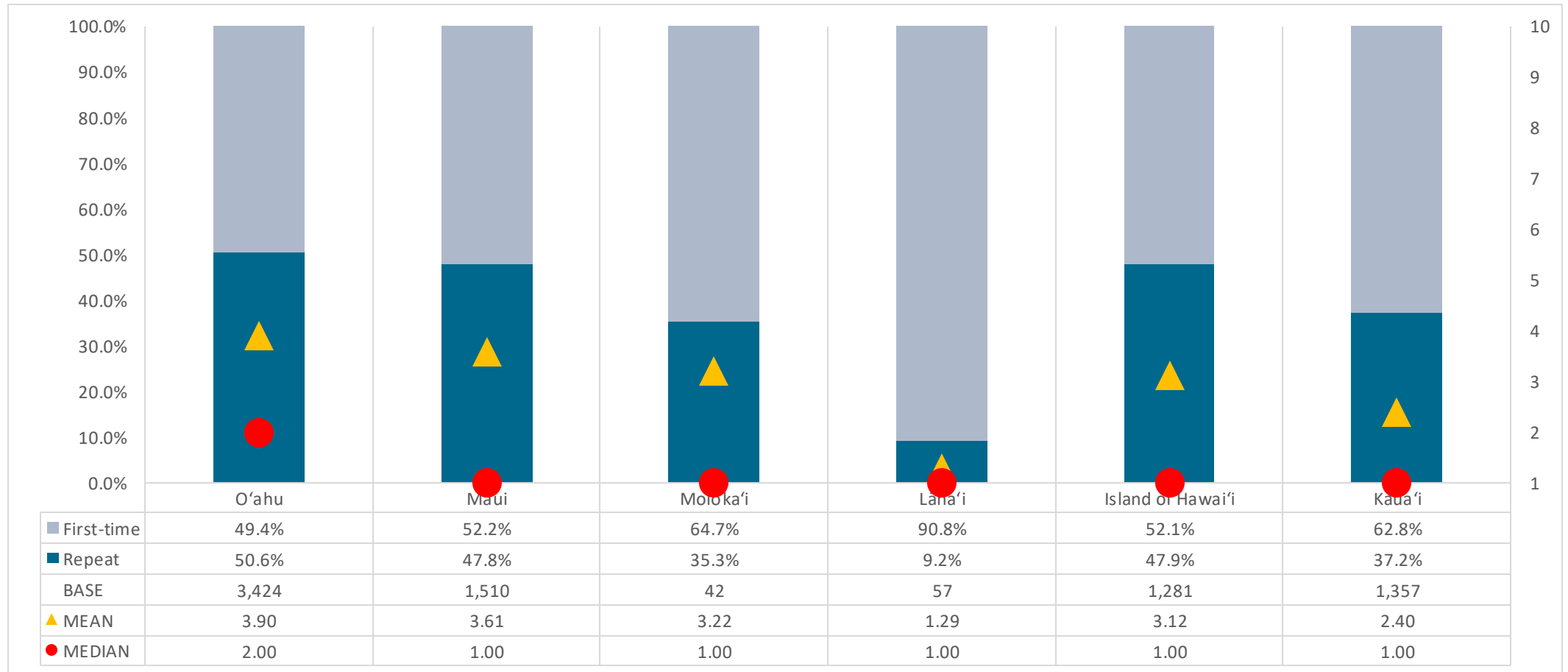
IMPACT OF HAWAIIAN CULTURAL EVENTS - U.S. EAST



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



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

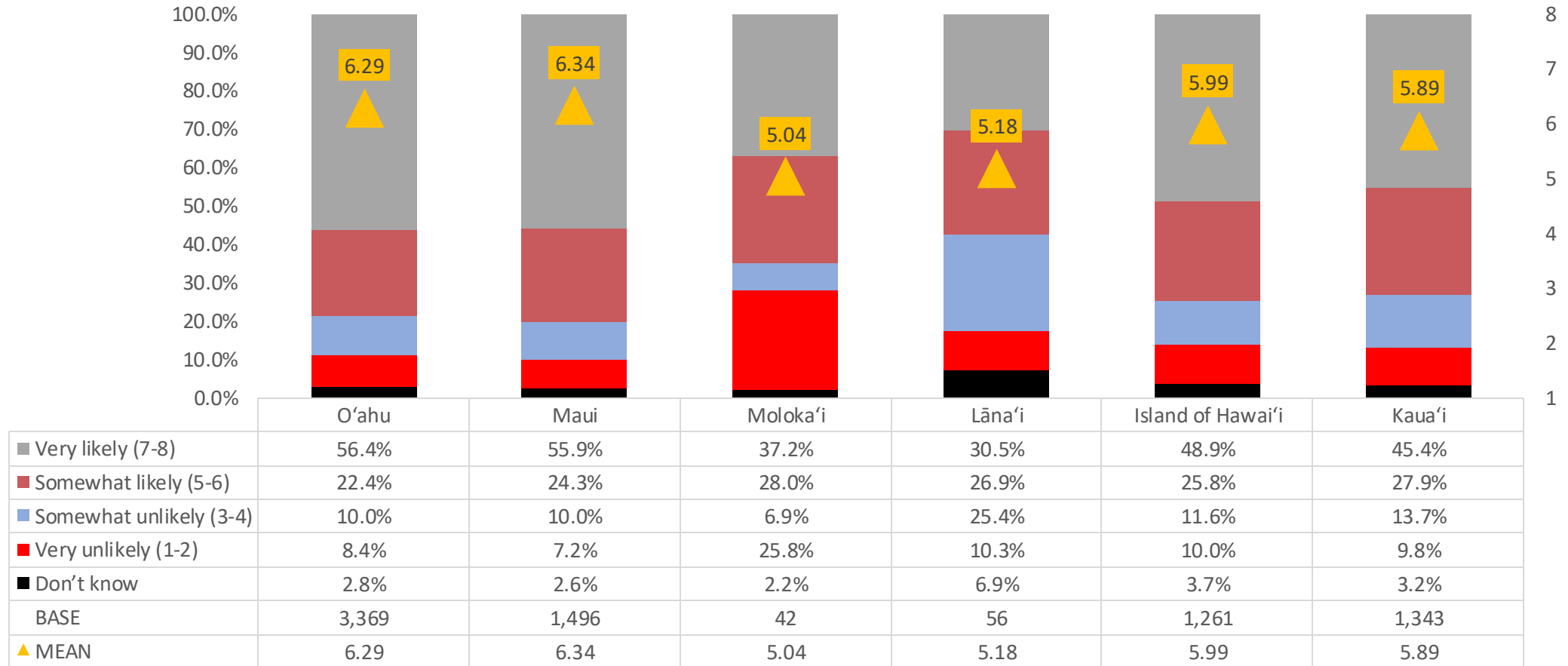


TRAVEL PARTY MEMBERS - U.S. EAST

	2016	2017	2018	2019	2020	2021	2022	2023	2024
My spouse	62.9%	60.9%	61.0%	62.0%	48.1%	56.0%	59.8%	59.7%	58.0%
Other adult members of my family	25.5%	24.6%	26.5%	27.6%	20.3%	27.3%	29.2%	28.8%	28.8%
My child(ren)/ grandchild(ren) under 18	18.1%	15.6%	19.5%	18.9%	14.9%	20.9%	22.6%	20.7%	22.0%
My friends/ associates	17.6%	14.9%	17.5%	16.6%	13.9%	17.4%	16.2%	14.7%	14.9%
Myself only (traveled alone/ no one else)	11.5%	12.3%	10.3%	9.9%	22.2%	10.2%	10.0%	10.6%	11.8%
My girlfriend/ boyfriend	5.7%	6.5%	6.6%	6.2%	7.6%	8.1%	6.5%	5.8%	5.7%
Same-gender partner	0.8%	1.2%	1.2%	1.2%	1.0%	1.0%	1.0%	1.1%	1.0%

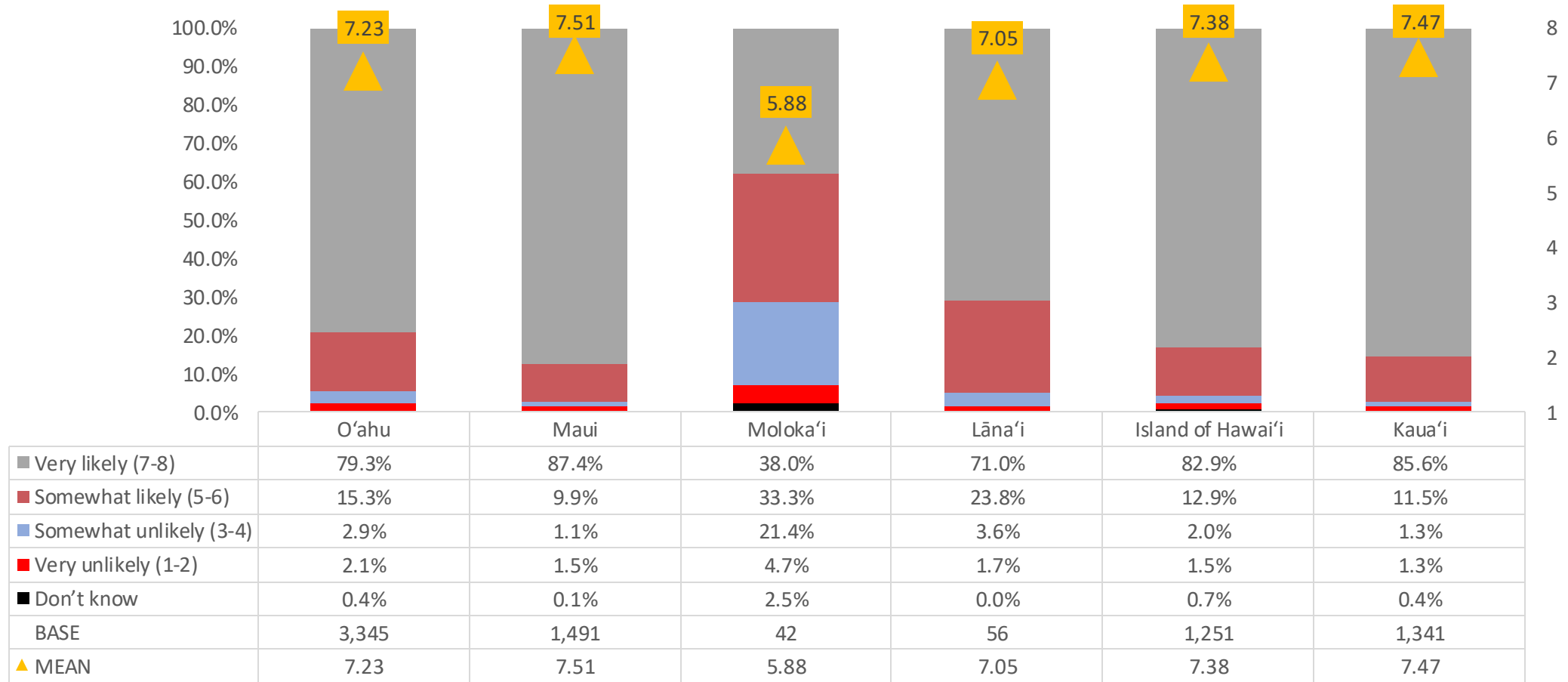
LIKELIHOOD OF RETURN VISIT - U.S. EAST

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



BRAND/ DESTINATION ADVOCACY – U.S. EAST

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



ACTIVITIES - SIGHTSEEING - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.6%	98.6%	100.0%	97.9%	99.0%	99.5%
On own (self-guided)/ driving around the island	76.7%	85.5%	62.5%	34.5%	84.5%	79.8%
Helicopter ride/ airplane tour	2.0%	4.2%	2.2%	4.2%	4.6%	16.6%
Boat tour/ submarine ride/ whale watching	21.8%	39.1%	12.6%	22.1%	30.5%	34.2%
Visiting towns/ communities	45.8%	55.1%	45.8%	31.9%	60.8%	62.7%
Private limousine/ van tour/ tour bus	16.6%	11.7%	16.4%	24.4%	13.9%	9.9%
Scenic views/ natural landmarks	62.4%	65.3%	61.8%	61.9%	73.5%	74.8%
Movie and TV filming location tours	11.2%	1.2%	2.2%	0.0%	2.3%	4.6%

ACTIVITIES - SIGHTSEEING - U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	97.4%	96.5%	96.6%	93.0%	96.4%	98.1%	98.8%	98.6%
On own (self-guided)/ driving around the island	82.0%	81.8%	81.1%	81.3%	83.2%	82.1%	80.9%	81.3%
Helicopter ride/ airplane tour	13.2%	12.1%	11.4%	3.9%	6.7%	7.2%	7.1%	6.1%
Boat tour/ submarine ride/ whale watching	33.2%	31.1%	31.7%	26.0%	35.4%	35.3%	33.0%	31.1%
Visiting towns/ communities	37.4%	57.0%	54.7%	47.9%	53.8%	55.4%	55.2%	54.7%
Private limousine/ van tour/ tour bus	19.9%	16.4%	16.9%	7.5%	12.5%	15.0%	15.3%	14.6%
Scenic views/ natural landmarks	77.7%	69.9%	67.2%	60.7%	68.9%	69.6%	70.1%	68.4%
Movie and TV filming location tours	8.3%	7.0%	6.0%	5.1%	6.2%	6.7%	7.1%	6.9%

ACTIVITIES - RECREATION - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	93.9%	96.8%	87.8%	90.5%	96.1%	94.2%
Beach/ sunbathing	81.0%	86.3%	53.2%	52.2%	77.4%	76.2%
Bodyboarding	4.6%	6.6%	2.6%	0.0%	6.5%	6.6%
Stand-up paddle boarding	3.9%	2.6%	0.0%	0.0%	5.0%	2.0%
Surfing	6.1%	6.2%	0.0%	0.0%	3.3%	5.4%
Canoe paddling	1.1%	1.3%	0.0%	1.8%	1.6%	0.5%
Kayaking	2.8%	2.8%	2.6%	2.1%	3.5%	9.3%
Swimming in the ocean	56.6%	64.4%	37.3%	28.8%	58.7%	53.2%
Snorkeling	27.8%	44.9%	17.4%	27.6%	46.1%	34.1%
Freediving	0.9%	1.5%	0.0%	0.0%	0.8%	0.6%
Windsurfing/ kitesurfing	0.2%	0.1%	0.0%	0.0%	0.1%	0.2%
Jet skiing/ parasailing	2.0%	1.2%	2.6%	0.0%	0.8%	0.3%
Scuba diving	1.3%	3.0%	2.6%	0.0%	2.1%	1.1%
Fishing	2.0%	2.5%	5.2%	0.0%	4.0%	2.4%
Golf	3.0%	9.0%	2.6%	6.3%	6.0%	6.6%

ACTIVITIES - RECREATION - U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	96.0%	96.2%	96.3%	92.9%	97.7%	97.7%	96.9%	95.9%
Beach/ sunbathing	84.8%	83.8%	83.0%	81.5%	89.7%	87.3%	85.5%	82.7%
Bodyboarding	13.8%	11.3%	10.4%	8.7%	9.2%	7.9%	7.0%	6.0%
Stand-up paddle boarding	*	*	*	6.6%	6.6%	5.1%	4.2%	3.8%
Surfing	7.8%	6.5%	6.3%	8.5%	9.0%	7.4%	6.4%	5.9%
Canoe paddling	9.1%	7.6%	7.4%	7.3%	8.5%	6.8%	6.0%	1.3%
Kayaking	**	**	**	**	**	**	**	4.5%
Swimming in the ocean	NA	65.1%	65.4%	62.3%	72.1%	68.1%	65.0%	60.1%
Snorkeling	NA	42.9%	43.4%	39.8%	49.5%	44.1%	39.7%	37.6%
Freediving	NA	NA	NA	1.8%	1.7%	1.6%	1.2%	1.0%
Windsurfing/ kitesurfing	0.4%	0.3%	0.3%	0.4%	0.2%	0.2%	0.1%	0.1%
Jet skiing/ parasailing	3.0%	1.8%	1.8%	1.5%	2.6%	2.0%	1.5%	1.5%
Scuba diving	4.0%	3.2%	3.4%	3.8%	3.5%	2.8%	2.2%	1.9%
Fishing	2.9%	3.1%	3.5%	3.6%	3.4%	2.9%	2.7%	2.8%
Golf	6.7%	6.7%	6.4%	7.4%	7.5%	6.8%	6.3%	5.9%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	93.9%	96.8%	87.8%	90.5%	96.1%	94.2%
Running/ jogging/ fitness walking	26.5%	32.8%	15.5%	12.1%	23.7%	25.3%
Cycling	1.8%	2.1%	0.0%	1.8%	2.0%	3.7%
Spa	8.1%	9.2%	2.2%	10.3%	6.5%	5.6%
Hiking	39.5%	45.2%	42.5%	31.9%	54.0%	47.3%
Backpacking/ camping	0.9%	1.8%	0.0%	0.0%	1.4%	2.2%
Agritourism	12.9%	10.8%	19.3%	7.3%	19.9%	12.0%
Sports event or tournament	2.5%	1.4%	2.6%	2.1%	1.1%	0.8%
Parks/ botanical gardens	37.7%	36.1%	21.2%	25.5%	49.3%	40.1%
Waterparks	1.6%	1.2%	0.0%	0.0%	1.0%	0.4%
Mountain tubing/ waterfall rappel	0.6%	0.8%	0.0%	0.0%	0.7%	8.2%
Zip-lining	3.4%	5.3%	0.0%	0.0%	3.8%	3.4%
Skydiving	0.7%	0.5%	0.0%	0.0%	0.3%	0.1%
All-terrain vehicle (ATV)	4.9%	2.4%	0.0%	0.0%	3.7%	3.4%
Horseback riding	1.9%	1.3%	2.2%	0.0%	1.9%	1.2%

ACTIVITIES - RECREATION - U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	96.0%	96.2%	96.3%	92.9%	97.7%	97.7%	96.9%	95.9%
Running/ jogging/ fitness walking	36.3%	28.5%	24.5%	35.5%	31.9%	27.6%	25.2%	28.5%
Cycling	NA	NA	NA	NA	NA	3.1%	3.5%	2.4%
Spa	11.6%	9.9%	10.0%	6.9%	9.8%	9.5%	8.8%	8.3%
Hiking	33.8%	36.0%	51.3%	49.1%	56.0%	52.9%	49.7%	46.1%
Backpacking/ camping	*	*	2.3%	2.6%	2.1%	1.8%	1.6%	1.5%
Agritourism	13.1%	17.1%	16.1%	10.8%	13.5%	15.5%	15.9%	14.5%
Sports event or tournament	2.3%	2.2%	2.9%	1.0%	0.6%	1.8%	1.6%	1.9%
Parks/ botanical gardens	47.6%	45.3%	43.0%	34.6%	41.8%	42.8%	42.3%	41.6%
Waterparks	NA	1.2%	1.3%	1.1%	1.2%	1.3%	1.3%	1.3%
Mountain tubing/ waterfall rappel	NA	1.7%	2.1%	1.3%	1.6%	1.9%	2.2%	2.3%
Zip-lining	NA	5.9%	5.6%	3.0%	4.9%	4.7%	3.9%	4.2%
Skydiving	NA	0.5%	0.6%	0.4%	0.7%	0.4%	0.3%	0.5%
All-terrain vehicle (ATV)	NA	3.8%	3.5%	4.0%	5.4%	4.4%	4.3%	4.3%
Horseback riding	NA	2.3%	2.5%	2.1%	2.8%	1.8%	1.4%	1.7%

* Combined with hiking

ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.6%	97.8%	80.7%	89.0%	97.0%	94.1%
Lunch/ sunset/ dinner/ evening cruise	23.8%	28.2%	11.2%	22.4%	20.1%	23.3%
Live music/ stage show	33.4%	29.4%	9.3%	7.6%	25.6%	27.1%
Nightclub/ dancing/ bar/ karaoke	8.7%	3.8%	0.0%	0.0%	5.1%	3.6%
Fine dining	41.6%	54.6%	7.7%	14.0%	41.3%	40.5%
Family restaurant	56.6%	57.4%	27.4%	22.7%	61.1%	52.2%
Fast food	37.7%	24.5%	14.5%	7.3%	29.4%	20.7%
Food truck	44.6%	46.8%	14.5%	12.1%	26.1%	41.3%
Café/ coffee house	45.8%	48.5%	32.2%	24.0%	52.6%	48.3%
Ethnic dining	32.9%	24.8%	4.8%	7.9%	25.7%	20.6%
Farm-to-table cuisine	14.0%	24.2%	2.6%	11.6%	20.2%	17.8%
Prepared own meal	25.4%	42.5%	40.3%	10.3%	46.0%	37.0%

ACTIVITIES – ENTERTAINMENT & DINING – U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	97.9%	97.7%	97.3%	96.9%	99.0%	98.8%	98.4%	97.2%
Lunch/ sunset/ dinner/ evening cruise	33.2%	26.1%	26.2%	20.7%	27.2%	27.9%	26.3%	25.7%
Live music/ stage show	39.6%	37.3%	35.9%	17.2%	28.4%	35.4%	34.6%	32.4%
Nightclub/ dancing/ bar/ karaoke	10.6%	10.0%	9.1%	6.0%	6.3%	7.3%	7.9%	6.6%
Fine dining	58.2%	55.7%	53.8%	44.0%	55.2%	51.6%	47.6%	45.6%
Family restaurant	65.8%	58.3%	58.4%	52.7%	57.9%	60.5%	58.2%	58.0%
Fast food	34.9%	35.7%	35.2%	39.8%	40.5%	34.7%	33.8%	32.1%
Food truck	NA	31.2%	31.4%	37.3%	44.3%	44.0%	43.5%	43.4%
Café/ coffee house	44.8%	43.9%	43.1%	40.3%	48.6%	48.9%	48.9%	49.7%
Ethnic dining	36.1%	34.0%	34.3%	27.0%	31.2%	31.9%	30.3%	29.5%
Farm-to-table cuisine	NA	NA	NA	NA	NA	19.2%	19.4%	18.8%
Prepared own meal	40.6%	43.6%	42.2%	55.9%	48.2%	40.7%	39.1%	36.8%

ACTIVITIES - SHOPPING - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	94.1%	96.0%	80.7%	69.2%	94.7%	92.8%
Malls/ department stores	51.6%	43.4%	0.0%	0.0%	26.2%	20.5%
Designer boutiques	16.4%	21.0%	0.0%	7.9%	17.3%	14.6%
Hotel/ resort stores	41.0%	38.5%	7.1%	16.1%	33.5%	24.2%
Swap meet/ flea market	16.8%	15.9%	7.4%	2.1%	12.1%	5.1%
Discount/ outlet stores	14.1%	11.1%	0.0%	0.0%	8.9%	10.6%
Supermarkets	37.7%	57.7%	42.5%	12.4%	60.6%	53.8%
Farmer's market	21.8%	29.5%	25.5%	13.4%	46.8%	35.6%
Convenience stores	53.4%	46.8%	22.5%	15.5%	43.5%	38.7%
Duty-free stores	7.1%	2.8%	4.5%	0.0%	2.1%	1.9%
Hawai'i-made products	44.5%	49.3%	29.3%	23.1%	50.4%	50.2%
Local shops and artisans	46.4%	60.8%	57.0%	36.7%	62.4%	66.8%
Local fashion designers	6.4%	8.2%	2.6%	0.0%	6.5%	7.9%

ACTIVITIES - SHOPPING - U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	95.9%	95.9%	95.4%	91.9%	96.7%	97.0%	96.7%	95.0%
Malls/ department stores	44.3%	43.1%	40.4%	36.5%	40.4%	40.8%	43.0%	42.3%
Designer boutiques	23.1%	18.6%	18.1%	15.3%	18.9%	19.7%	18.4%	18.3%
Hotel/ resort stores	39.5%	39.2%	37.9%	25.5%	37.7%	40.9%	40.5%	37.8%
Swap meet/ flea market	18.2%	15.6%	14.8%	11.8%	15.1%	14.7%	14.7%	14.7%
Discount/ outlet stores	19.1%	17.8%	16.2%	14.2%	14.6%	15.4%	14.8%	12.7%
Supermarkets	51.4%	59.2%	58.6%	62.8%	63.7%	56.2%	54.3%	51.0%
Farmer's market	28.2%	31.2%	30.3%	26.9%	31.8%	32.5%	31.0%	32.2%
Convenience stores	44.6%	48.1%	48.0%	45.4%	53.3%	51.8%	50.5%	49.3%
Duty-free stores	4.1%	4.6%	4.4%	2.8%	3.3%	4.7%	4.2%	4.8%
Hawai'i-made products	NA	NA	NA	NA	NA	49.4%	49.4%	49.4%
Local shops and artisans	67.6%	67.0%	66.9%	56.7%	66.0%	62.6%	61.0%	57.7%
Local fashion designers	NA	NA	NA	NA	NA	NA	NA	7.5%

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

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	80.6%	68.7%	68.2%	51.1%	77.4%	67.0%
Historic military sites and museums	50.9%	6.1%	11.9%	5.5%	17.5%	7.0%
Historic Hawaiian sites and museums	34.8%	27.3%	33.7%	27.4%	48.8%	32.1%
Other historical sites, museums, and homes	15.6%	11.4%	12.2%	10.3%	18.6%	13.1%
Art museums	3.8%	1.2%	0.0%	0.0%	2.0%	1.8%
Art galleries and exhibitions	5.2%	9.8%	0.0%	12.1%	10.7%	8.3%
Lū'au/ Polynesian show/ hula show	39.1%	32.4%	11.2%	0.0%	29.6%	30.8%
Lesson- e.g. ukulele, hula, canoe, lei making	7.3%	5.1%	2.6%	5.5%	5.1%	4.3%
Play/ concert/ theatre	3.2%	1.8%	4.5%	0.0%	2.1%	0.9%
Art/ craft fair	6.0%	14.0%	12.9%	3.9%	12.7%	11.9%
Festival/ event	5.3%	2.9%	4.8%	2.1%	4.3%	3.2%

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

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	81.3%	77.1%	75.6%	57.8%	71.5%	78.8%	78.8%	76.3%
Historic military sites and museums	42.9%	28.3%	27.2%	23.4%	27.4%	29.0%	30.3%	29.8%
Historic Hawaiian sites and museums	NA	NA	NA	NA	34.3%	36.6%	37.9%	36.4%
Other historical sites, museums, and homes	34.7%	31.4%	31.1%	23.9%	13.1%	14.6%	15.8%	15.8%
Art museums	*	*	*	*	2.5%	3.3%	3.1%	2.8%
Art galleries and exhibitions	*	*	*	*	9.1%	10.6%	9.8%	8.3%
Lū'au/ Polynesian show/ hula show	47.6%	42.0%	41.3%	16.1%	31.7%	42.2%	40.1%	37.1%
Lesson- e.g. ukulele, hula, canoe, lei making	6.3%	8.5%	8.1%	3.8%	4.4%	6.1%	6.9%	6.4%
Play/ concert/ theatre	4.7%	5.1%	4.3%	1.8%	1.4%	2.1%	3.2%	2.5%
Art/ craft fair	12.8%	13.5%	11.9%	7.0%	7.6%	10.3%	10.6%	10.6%
Festival/ event	9.8%	5.3%	5.2%	5.0%	2.2%	4.2%	5.3%	4.8%

* Combined Museum/ Art galleries as single option

ACTIVITIES - TRANSPORTATION - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	88.9%	94.1%	65.2%	68.4%	93.1%	93.8%
Airport shuttle	14.3%	8.8%	0.0%	16.1%	16.8%	13.1%
Trolley	4.0%	0.0%	0.0%	0.0%	1.5%	1.5%
Public bus	7.6%	2.1%	4.8%	1.8%	2.0%	1.5%
Tour bus/ tour van	16.0%	10.9%	25.0%	22.9%	13.3%	13.8%
Taxi/ limo	10.4%	5.5%	0.0%	6.1%	6.3%	4.4%
Rental car	55.9%	79.4%	32.9%	24.3%	76.9%	74.4%
Ride share	32.0%	12.8%	6.7%	7.6%	13.3%	8.6%
Car share	3.6%	3.4%	5.2%	3.9%	3.4%	4.3%
Bicycle rental	1.6%	1.1%	0.0%	1.8%	1.6%	3.3%

ACTIVITIES - TRANSPORTATION - U.S. EAST

	2017	2018	2019	2020	2021	2022	2023	2024
TOTAL	95.0%	92.4%	93.2%	81.2%	91.9%	93.7%	92.9%	91.0%
Airport shuttle	26.3%	20.2%	17.6%	10.2%	15.6%	14.9%	15.3%	14.1%
Trolley	4.5%	3.4%	3.7%	1.7%	2.1%	3.6%	4.1%	2.5%
Public bus	7.5%	5.7%	4.8%	3.4%	5.4%	4.7%	5.1%	4.8%
Tour bus/ tour van	20.6%	18.0%	18.6%	7.8%	11.2%	15.1%	15.8%	14.4%
Taxi/ limo	20.1%	12.4%	10.0%	7.1%	13.1%	10.3%	8.7%	8.2%
Rental car	75.3%	74.2%	74.4%	66.1%	75.3%	70.9%	68.8%	68.1%
Ride share	NA	14.9%	18.3%	16.5%	19.4%	20.4%	22.7%	21.9%
Car share	NA	NA	NA	NA	NA	5.9%	5.5%	3.9%
Bicycle rental	NA	2.2%	2.3%	2.5%	3.7%	2.3%	2.1%	1.9%

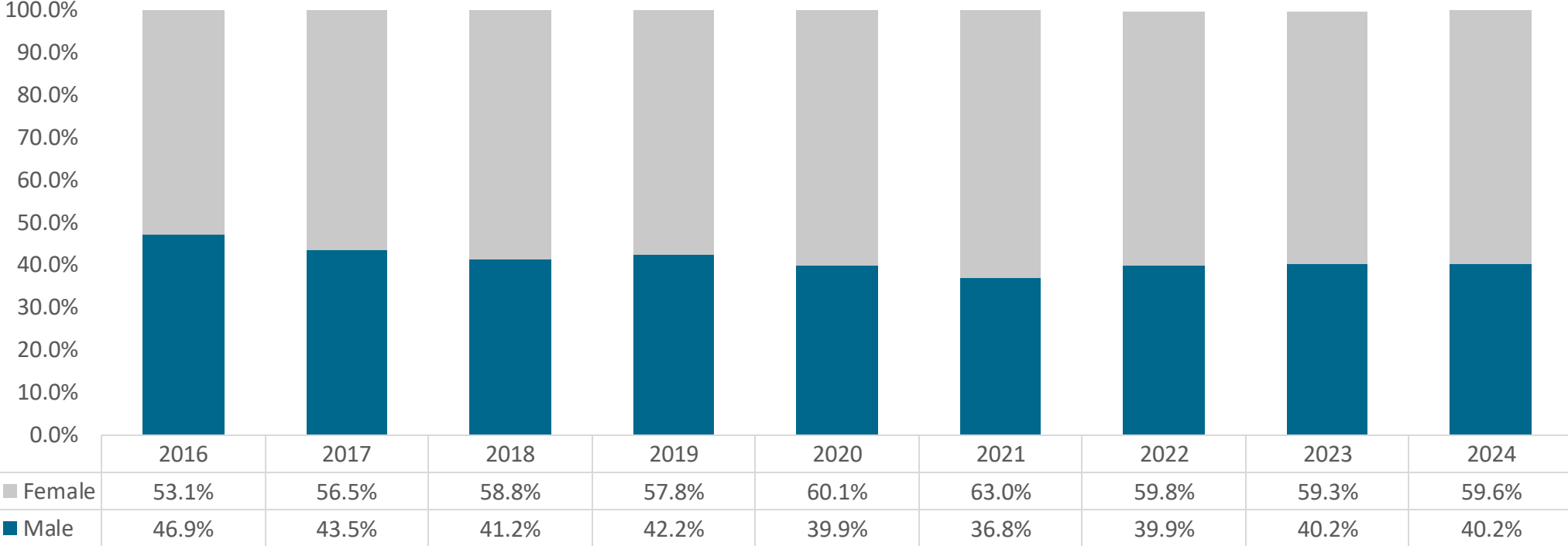
ACTIVITIES - OTHER - U.S. EAST

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	35.9%	20.9%	33.2%	9.7%	26.1%	16.3%
Visiting friends/ relatives	34.9%	17.3%	28.0%	7.9%	25.1%	14.4%
Giving back to the local community	1.9%	4.4%	5.2%	1.8%	1.3%	2.7%

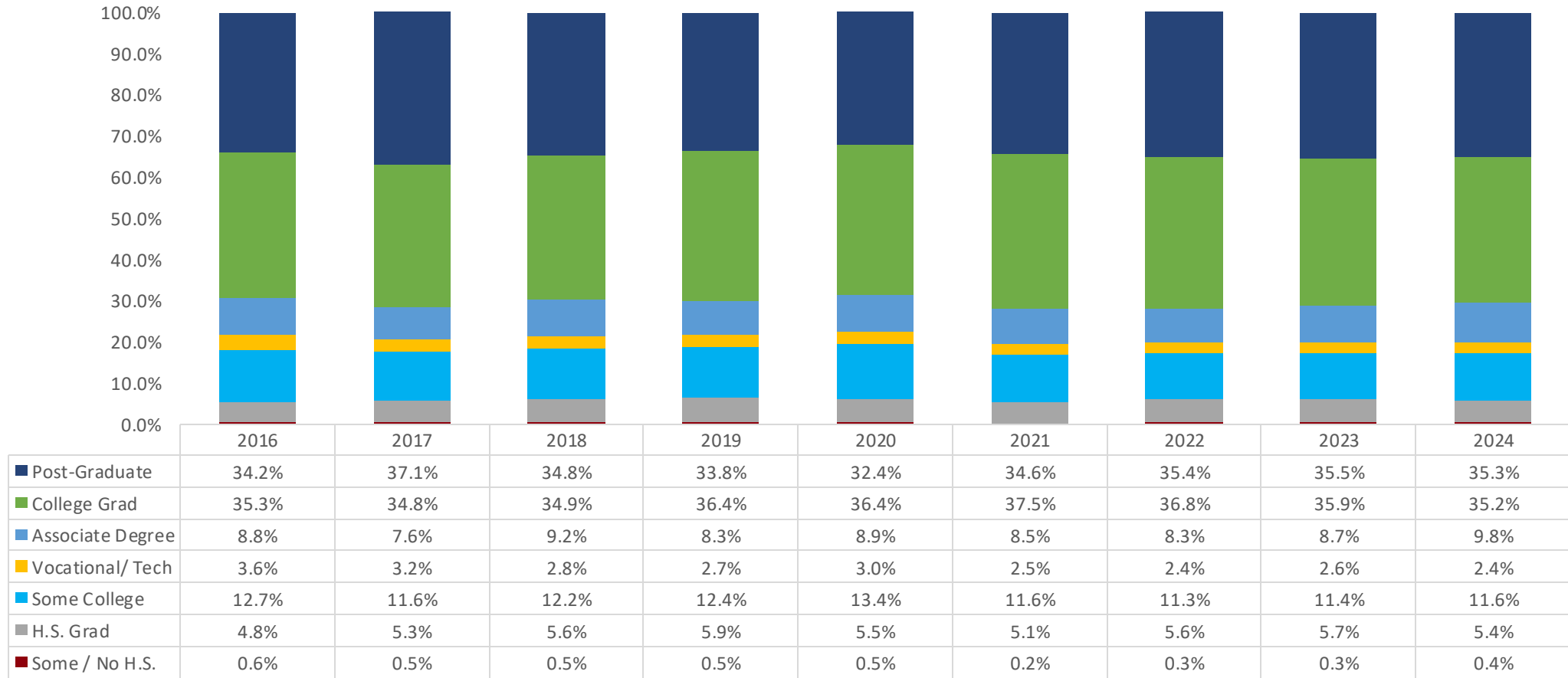
ACTIVITIES - OTHER - U.S. EAST

	2018	2019	2020	2021	2022	2023	2024
TOTAL	26.4%	25.2%	39.8%	28.2%	28.5%	32.3%	29.6%
Visiting friends/ relatives	25.6%	24.4%	39.2%	27.3%	26.0%	28.9%	27.8%
Giving back to the local community	1.3%	1.1%	1.1%	1.5%	3.3%	4.4%	2.7%

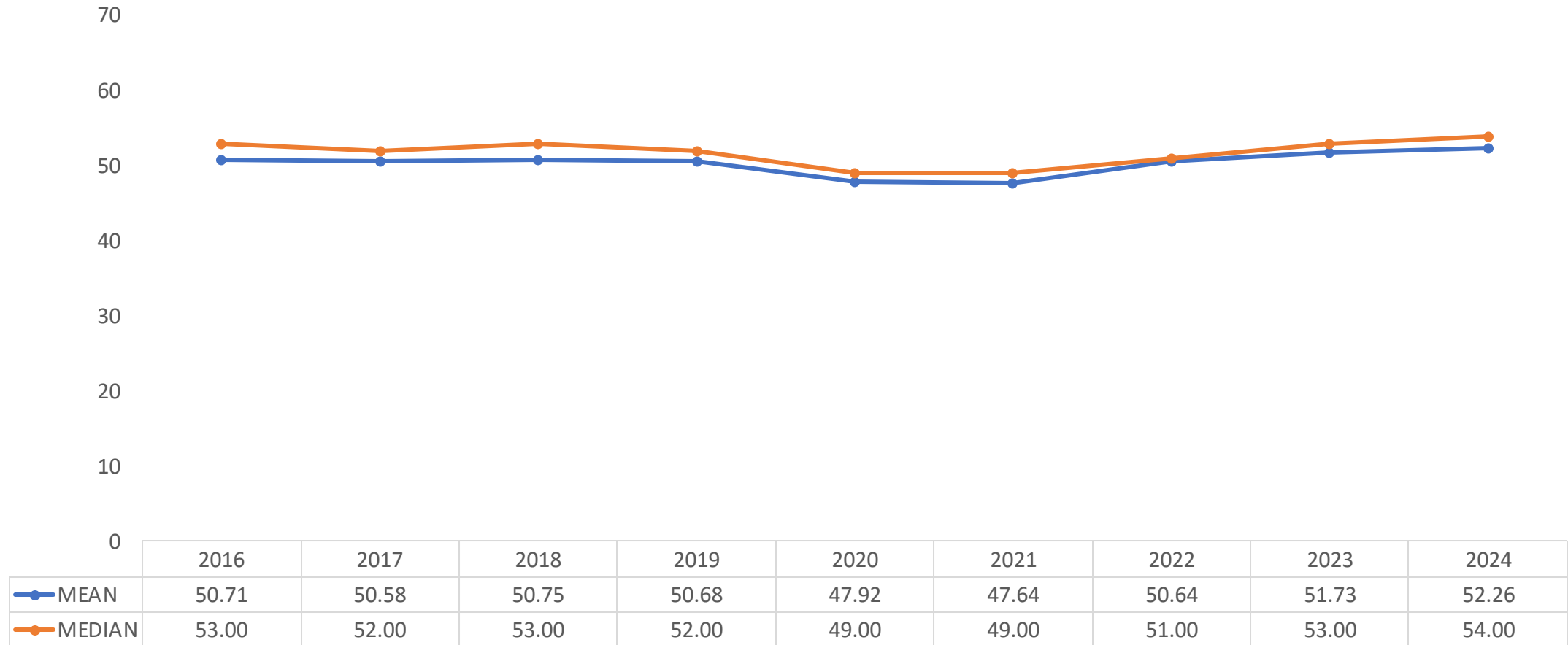
VISITOR PROFILE - GENDER - U.S. EAST



VISITOR PROFILE - EDUCATION - U.S. EAST



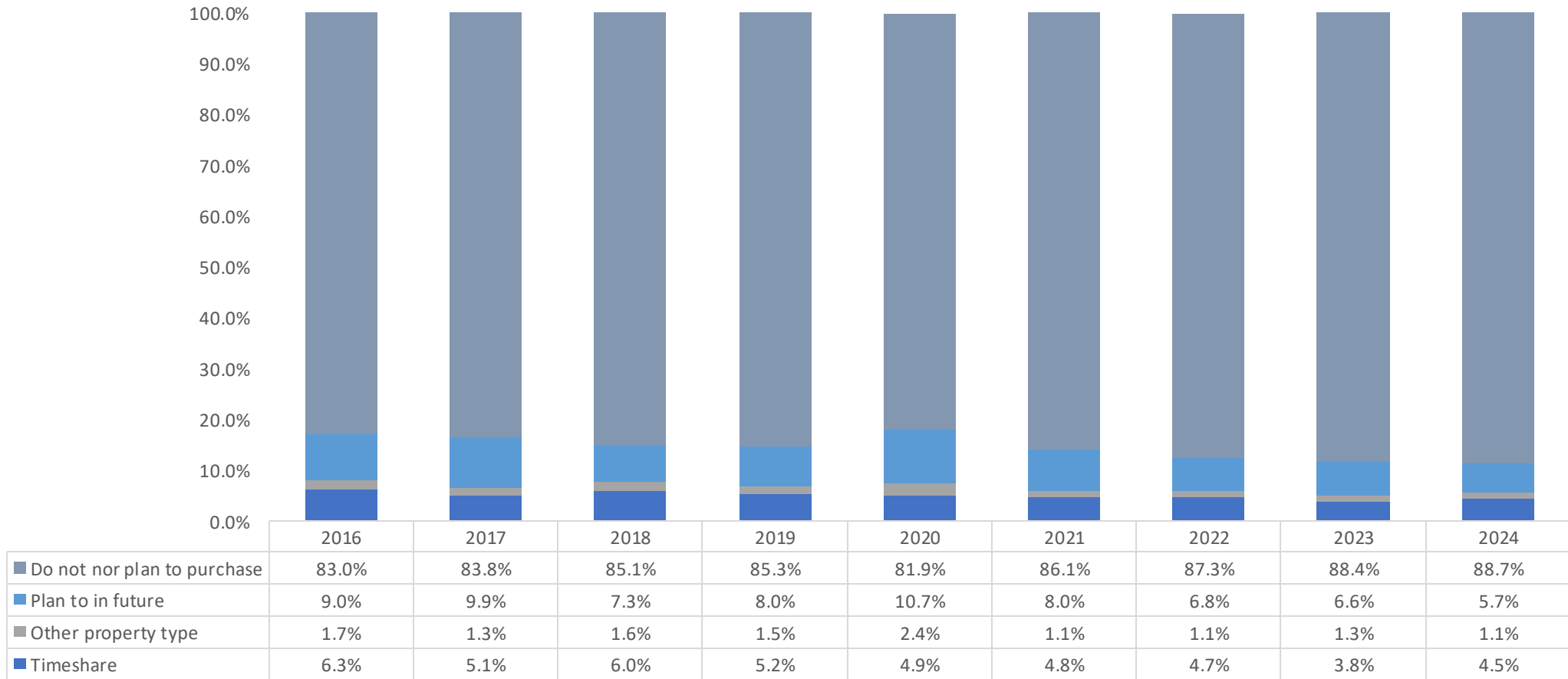
VISITOR PROFILE - AGE - U.S. EAST



VISITOR PROFILE - EMPLOYMENT STATUS - U.S. EAST



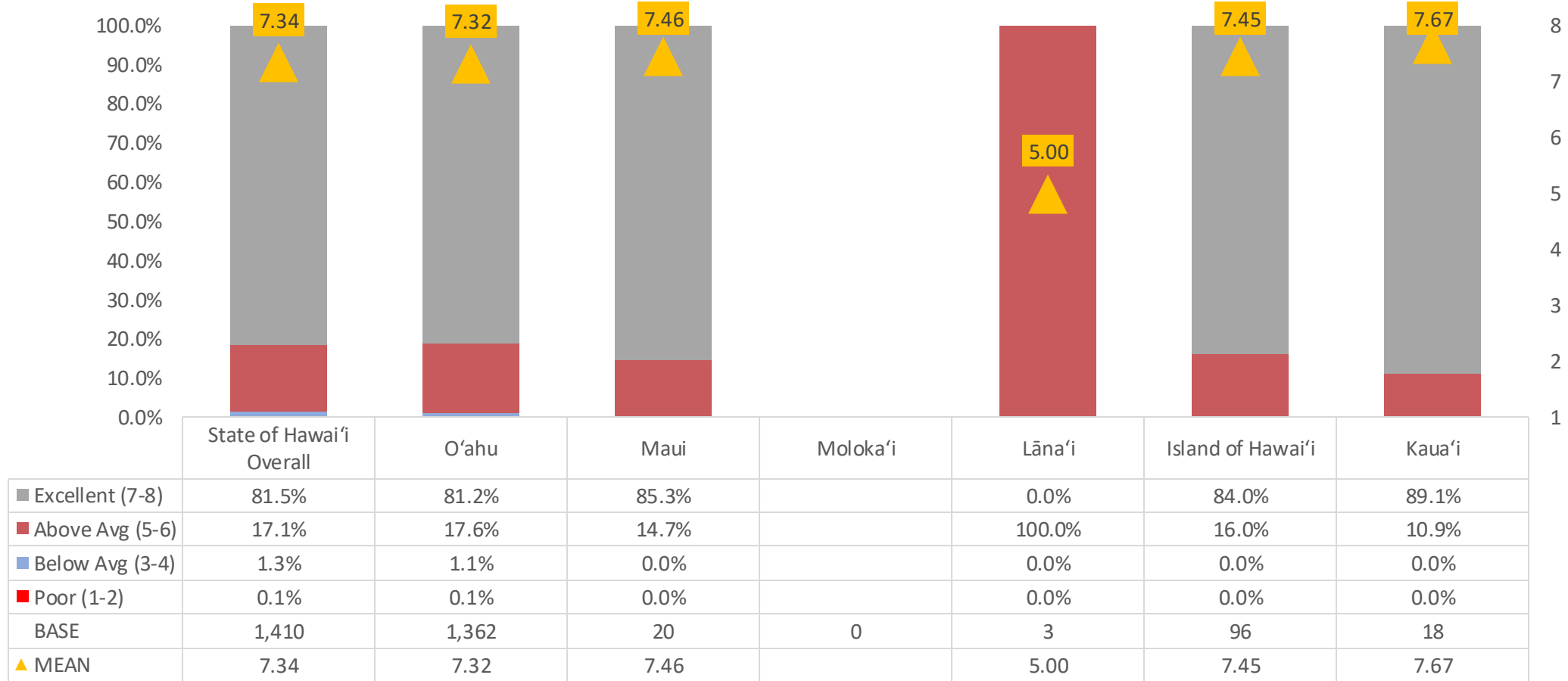
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - U.S. EAST



Section 15 – Japan

OVERALL SATISFACTION - MOST RECENT TRIP - JAPAN

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



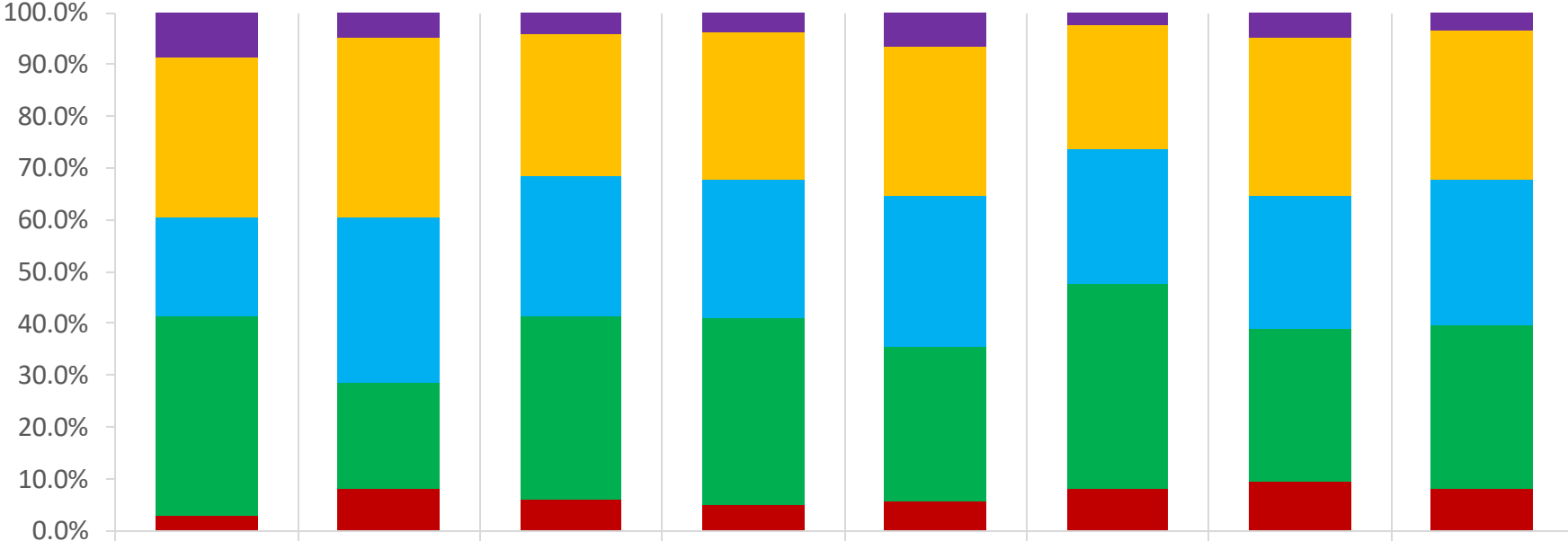
PRIMARY PURPOSE OF TRIP - JAPAN

	2018	2019	2020	2022	2023	2024
Vacation	65.4%	68.1%	68.8%	63.1%	61.6%	63.4%
Honeymoon	10.2%	10.1%	14.0%	4.9%	14.4%	13.2%
Visit friends/ relatives	1.2%	1.0%	2.1%	9.0%	7.0%	4.2%
To get married	2.6%	2.4%	2.8%	0.6%	1.3%	2.6%
Other business	2.4%	2.3%	1.5%	2.7%	0.7%	2.3%
Incentive trip	0.9%	1.0%	3.7%	1.0%	2.1%	2.0%
Layover/ break up long flight	0.4%	0.2%	0.2%	4.5%	3.4%	1.9%
Wedding/ vow renewal	4.5%	3.7%	1.3%	1.6%	1.7%	1.4%
Corporate meeting	0.0%	0.0%	0.9%	3.6%	2.0%	1.2%

PRIMARY + SECONDARY PURPOSE OF TRIP - JAPAN

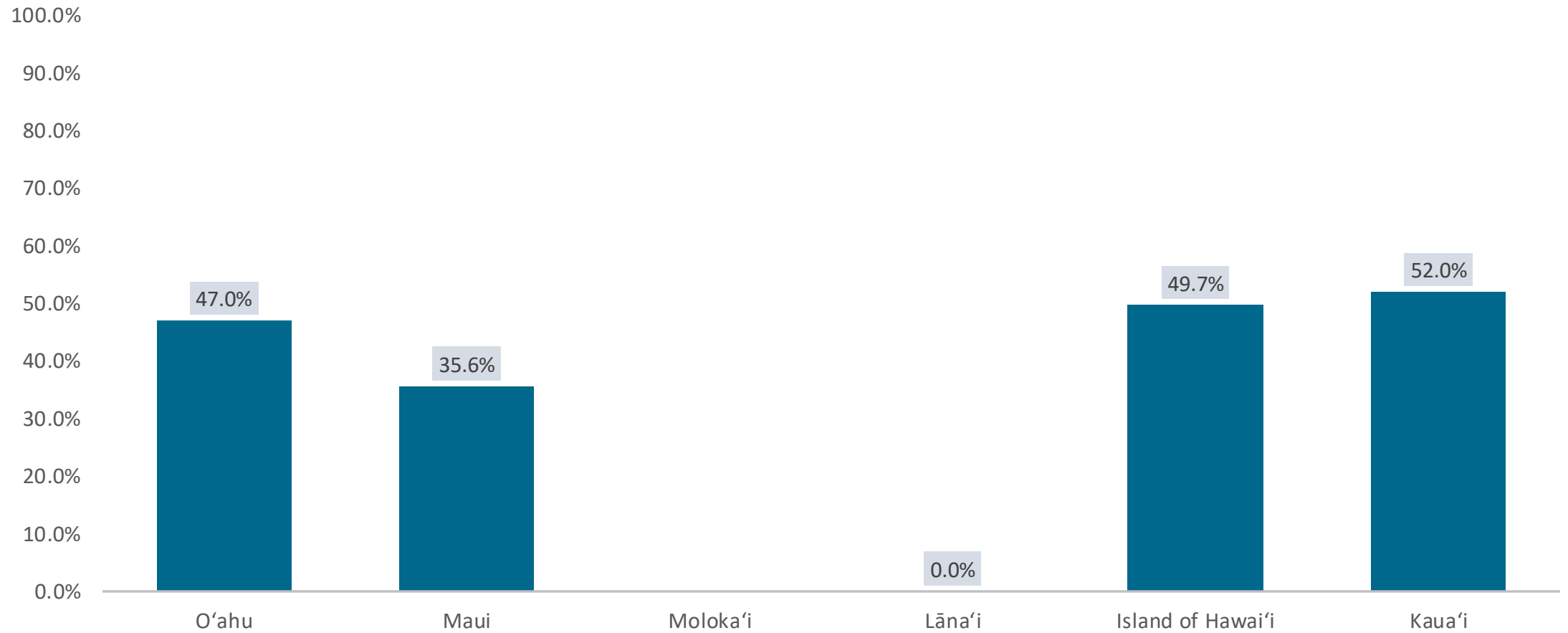
	2018	2019	2020	2022	2023	2024
Vacation	86.0%	87.7%	82.3%	81.8%	78.8%	80.6%
Honeymoon	12.9%	12.5%	16.1%	5.2%	15.9%	15.1%
Visit friends/ relatives	4.7%	3.6%	5.7%	21.6%	14.0%	10.0%
Incentive trip	2.0%	2.1%	7.6%	2.2%	3.8%	4.7%
To get married	3.5%	3.3%	4.6%	0.9%	2.2%	4.1%
Other business	3.3%	3.2%	2.1%	4.2%	1.8%	3.3%
Sports event	0.0%	0.0%	1.8%	3.0%	1.5%	2.6%
Layover/ break up long flight	0.0%	0.5%	0.2%	4.8%	3.9%	2.3%
Corporate meeting	0.0%	0.0%	2.2%	6.2%	2.4%	1.9%
Wedding/ vow renewal	5.2%	4.1%	1.3%	1.6%	1.8%	1.8%
Convention/ conference	0.0%	1.1%	1.2%	2.8%	2.1%	1.2%

VACATION TRIP DESCRIPTION - JAPAN



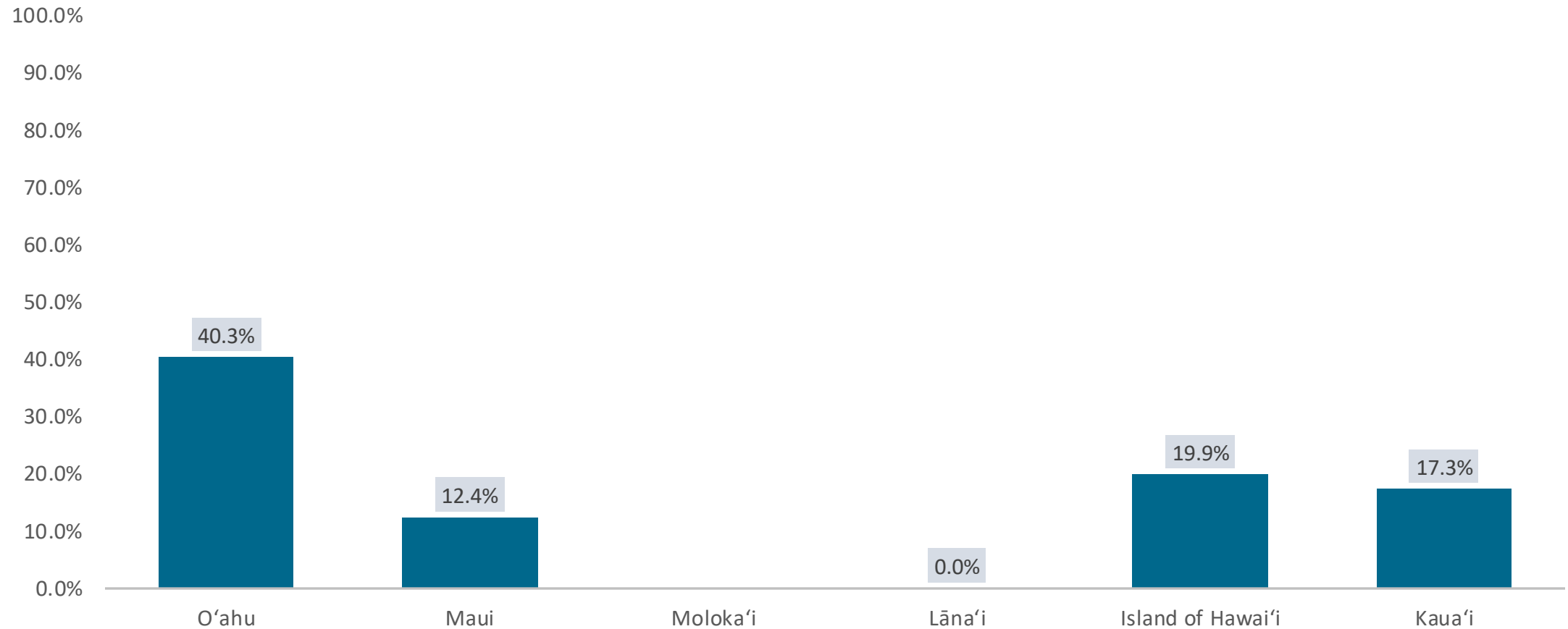
	2016	2017	2018	2019	2020	2022	2023	2024
Once-in-a-lifetime	8.7%	4.8%	4.0%	3.9%	6.5%	2.4%	4.7%	3.3%
Special occasion	30.8%	34.9%	27.7%	28.2%	28.9%	23.9%	30.7%	28.9%
More special than most trips	19.2%	32.0%	26.9%	26.7%	29.0%	26.1%	25.5%	28.2%
Annual/ Semi-annual trip	38.4%	20.2%	35.5%	36.1%	29.9%	39.5%	29.5%	31.3%
Other	2.9%	8.2%	5.9%	5.1%	5.7%	8.2%	9.6%	8.2%

ADVERTISING AWARENESS - JAPAN



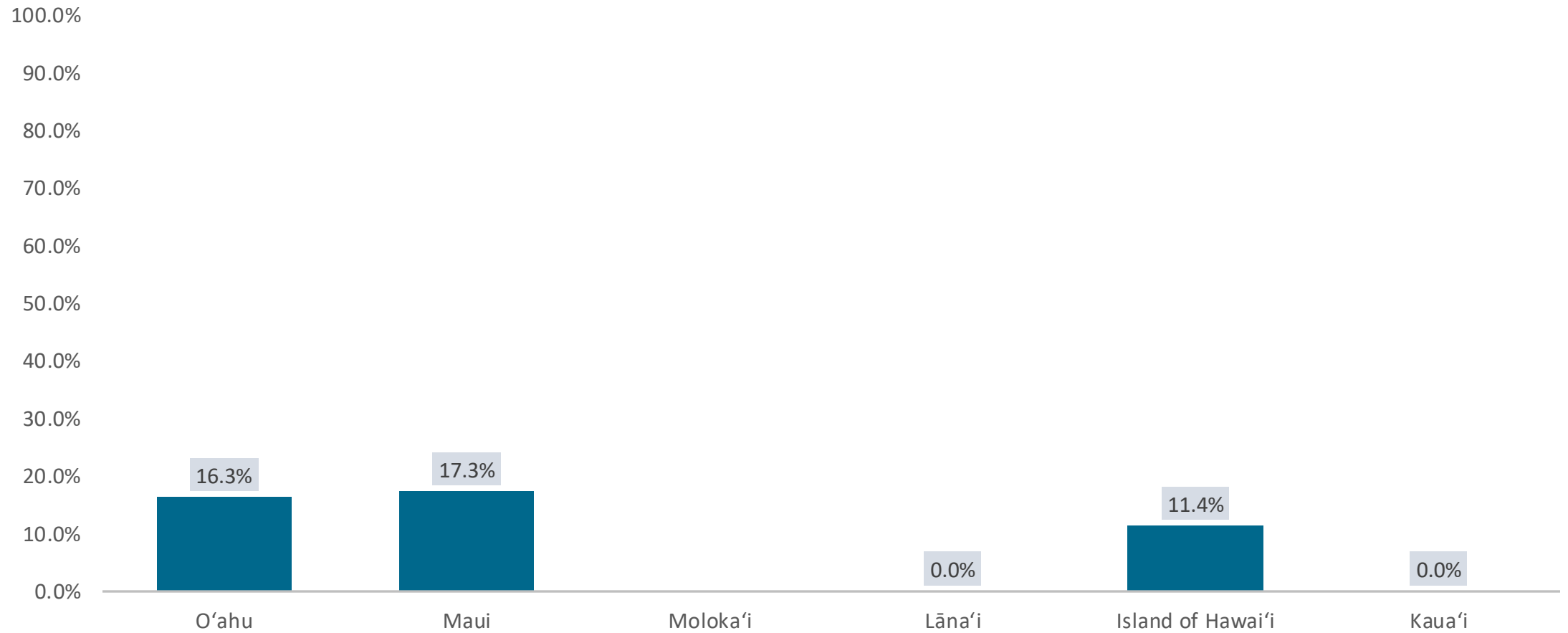
* There were no visitors from Japan who took part in the study who visited Moloka'i.

IMPACT OF LOCATION FILMING - JAPAN



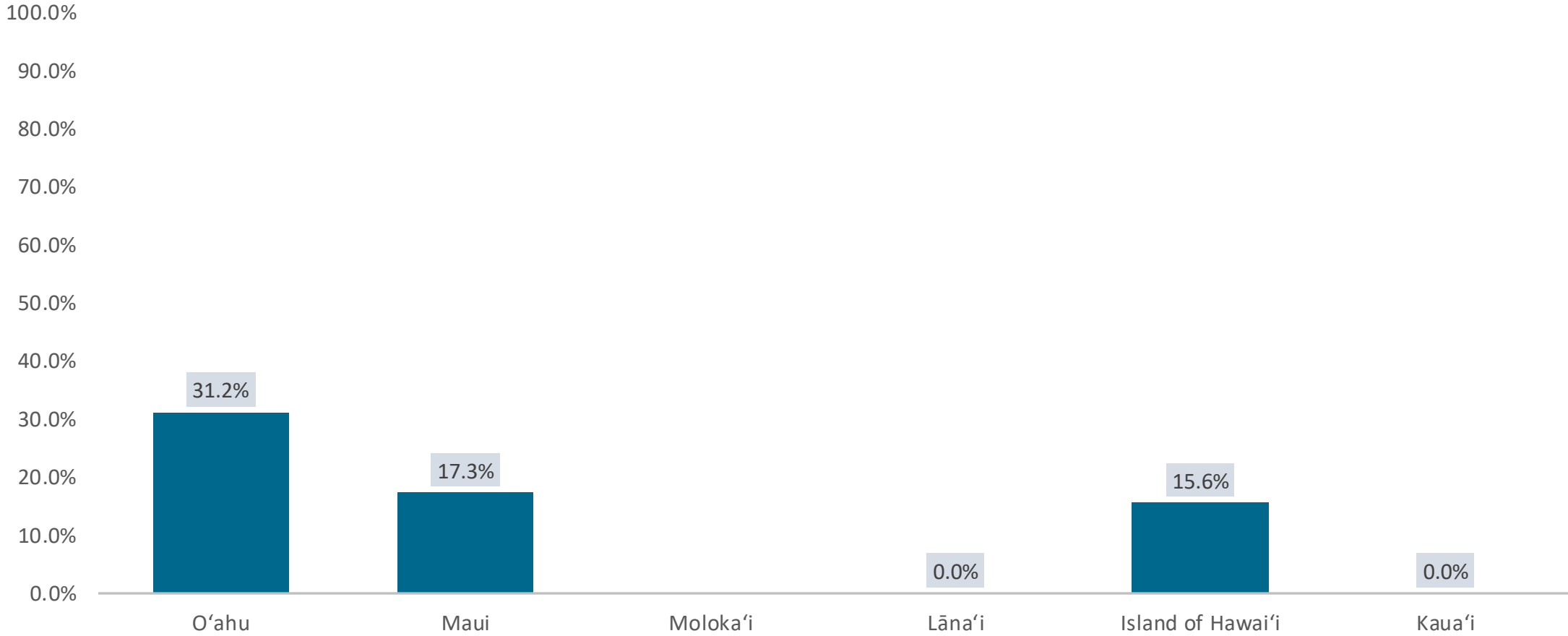
* There were no visitors from Japan who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN MUSIC - JAPAN



* There were no visitors from Japan who took part in the study who visited Moloka'i.

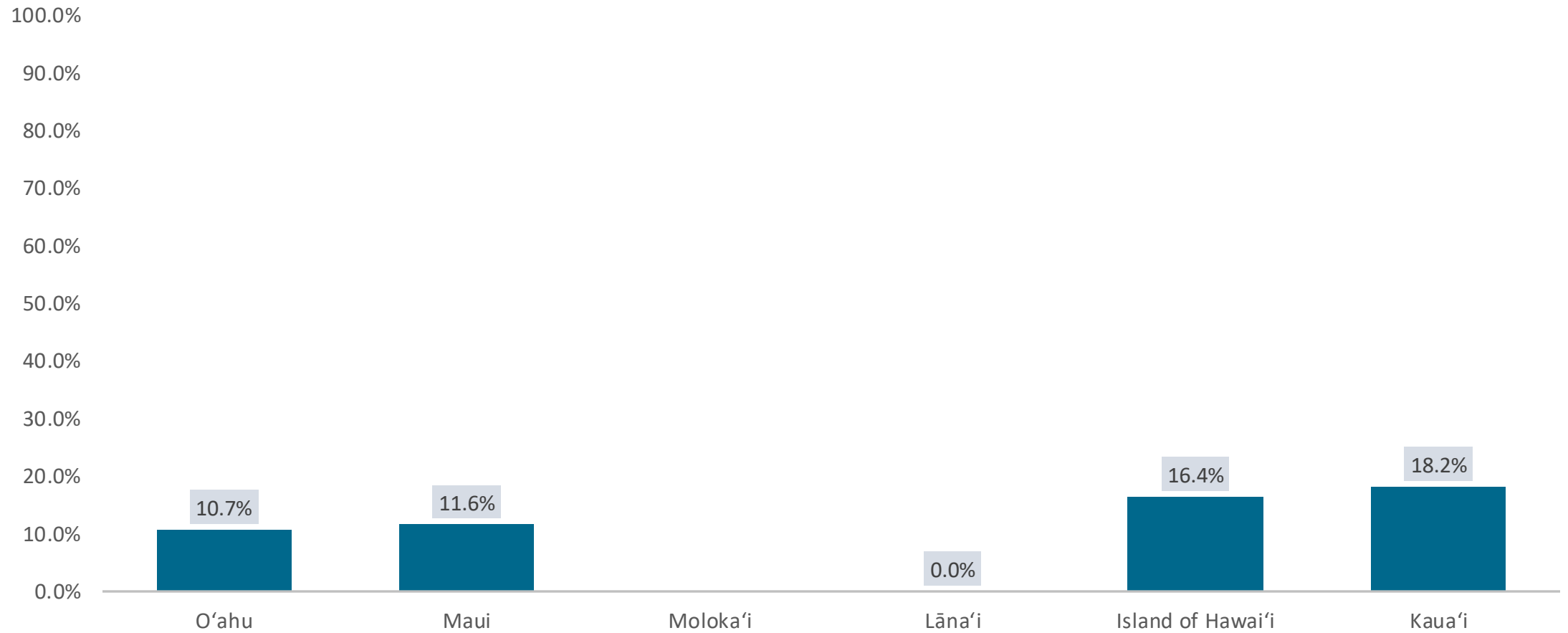
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - JAPAN



* There were no visitors from Japan who took part in the study who visited Moloka'i.

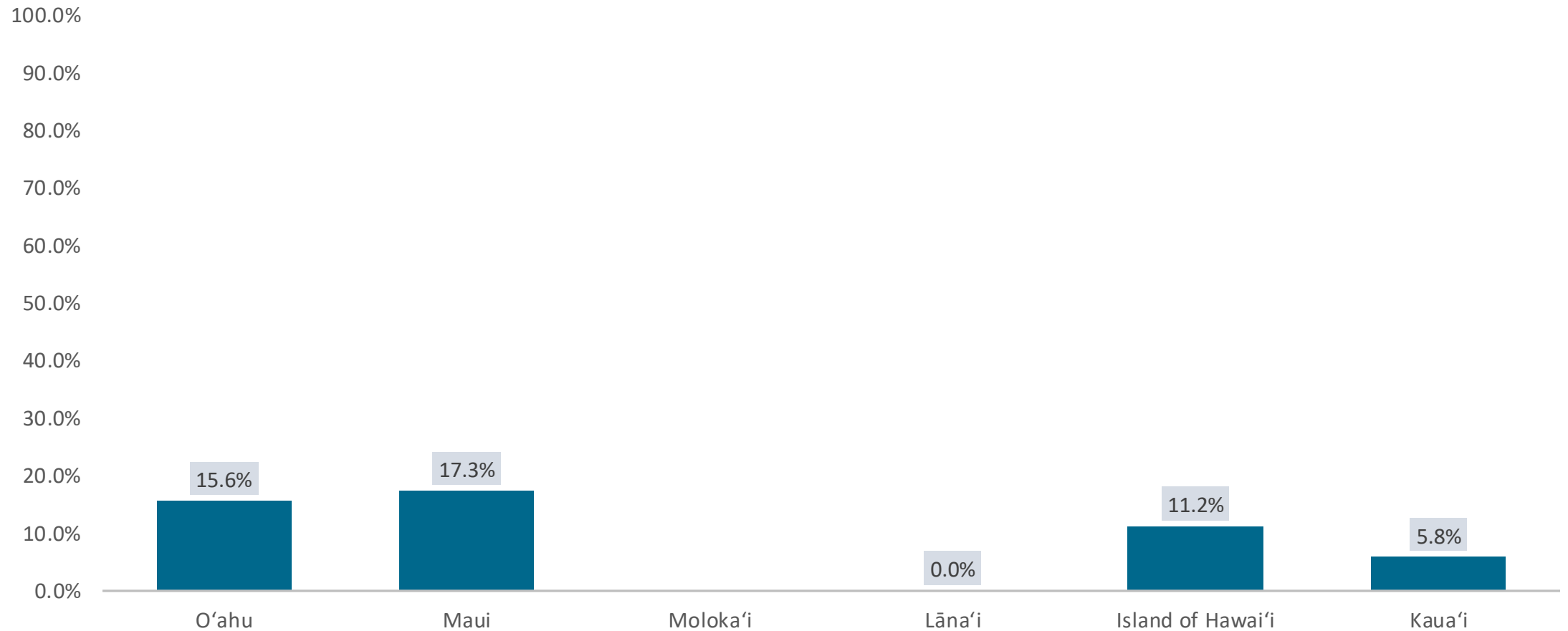


IMPACT OF OUTDOOR/ SPORTING EVENTS - JAPAN



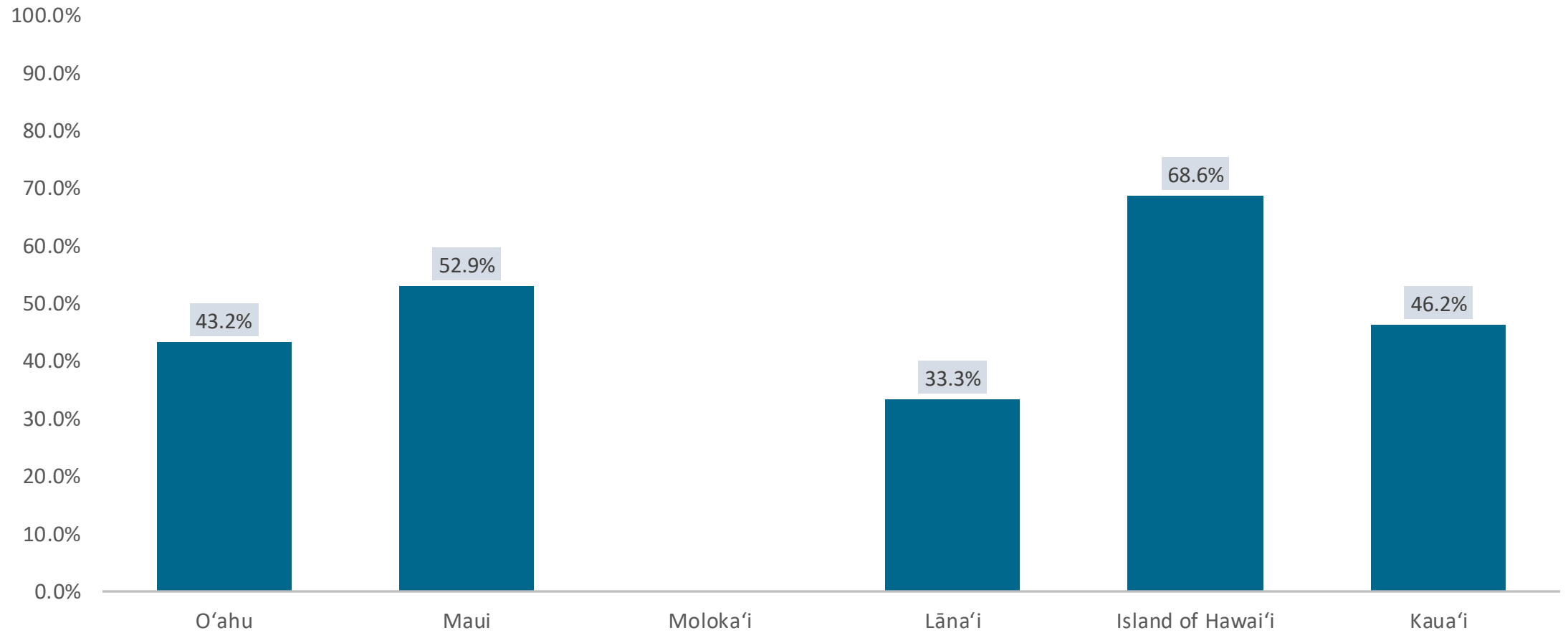
* There were no visitors from Japan who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN CULTURAL EVENTS - JAPAN



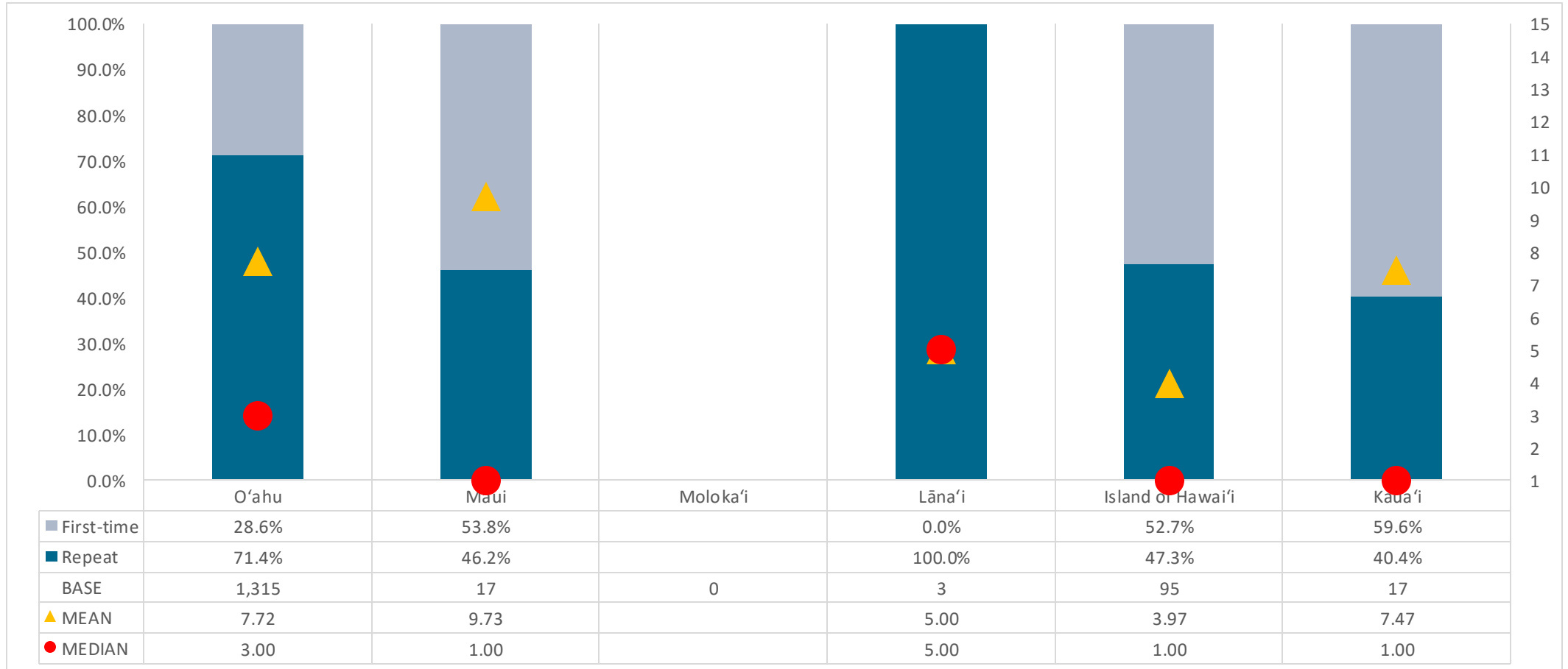
* There were no visitors from Japan who took part in the study who visited Moloka'i.

IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - JAPAN



* There were no visitors from Japan who took part in the study who visited Moloka'i.

1ST TIME VS REPEAT VISITORS - JAPAN

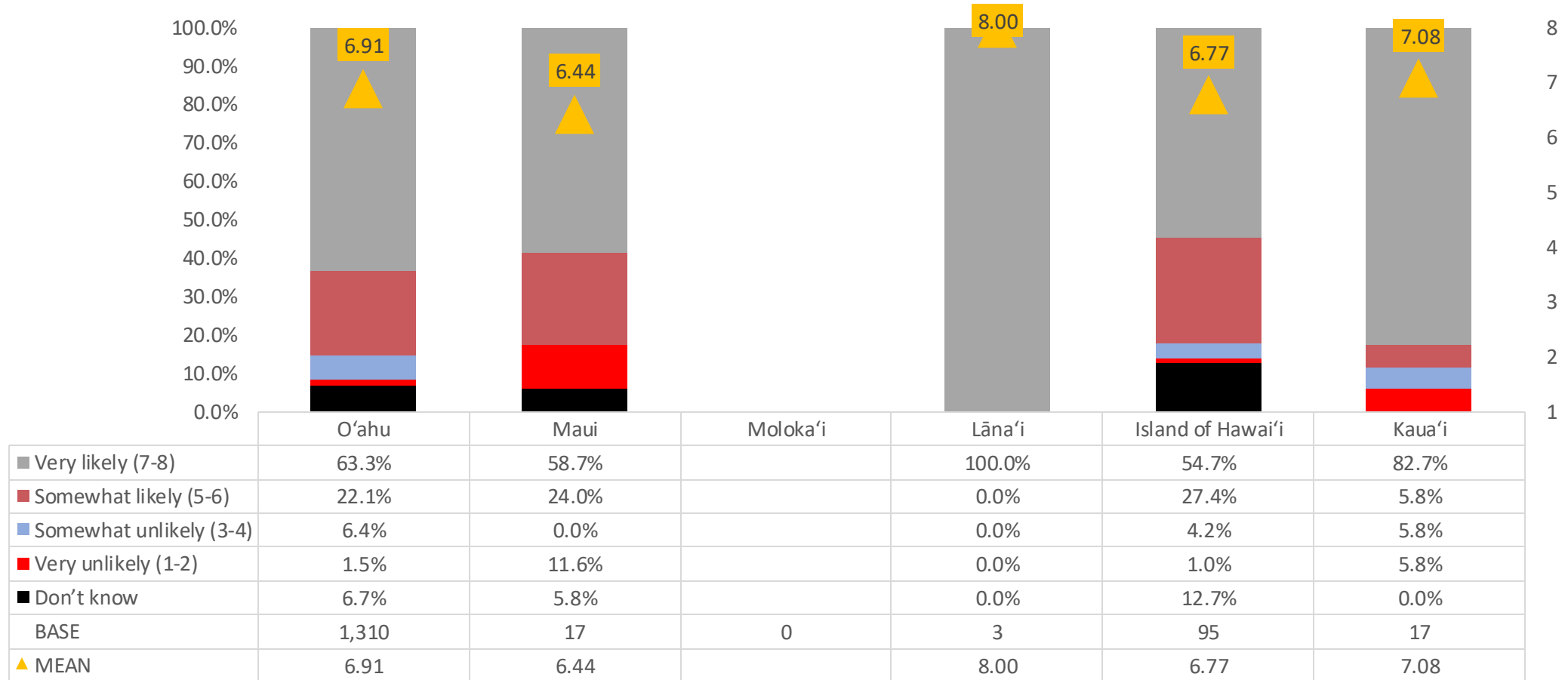


TRAVEL PARTY MEMBERS - JAPAN

	2016	2017	2018	2019	2020	2022	2023	2024
My spouse	65.0%	51.9%	50.6%	56.6%	46.5%	49.0%	54.5%	60.0%
Other adult members of my family	31.5%	26.2%	23.8%	23.6%	24.5%	14.0%	21.3%	25.0%
My child(ren)/ grandchild(ren) under 18	17.7%	15.0%	15.9%	17.0%	10.3%	11.0%	13.5%	18.8%
My friends/ associates	17.4%	21.7%	21.9%	21.2%	29.8%	16.8%	15.1%	15.1%
Myself only (traveled alone/ no one else)	4.9%	7.5%	7.1%	5.7%	4.9%	24.1%	16.7%	11.5%
My girlfriend/ boyfriend	2.5%	3.8%	6.9%	4.2%	3.9%	2.7%	2.7%	1.9%
Same-gender partner	0.2%	0.4%	0.3%	0.2%	0.2%	0.0%	0.1%	0.1%

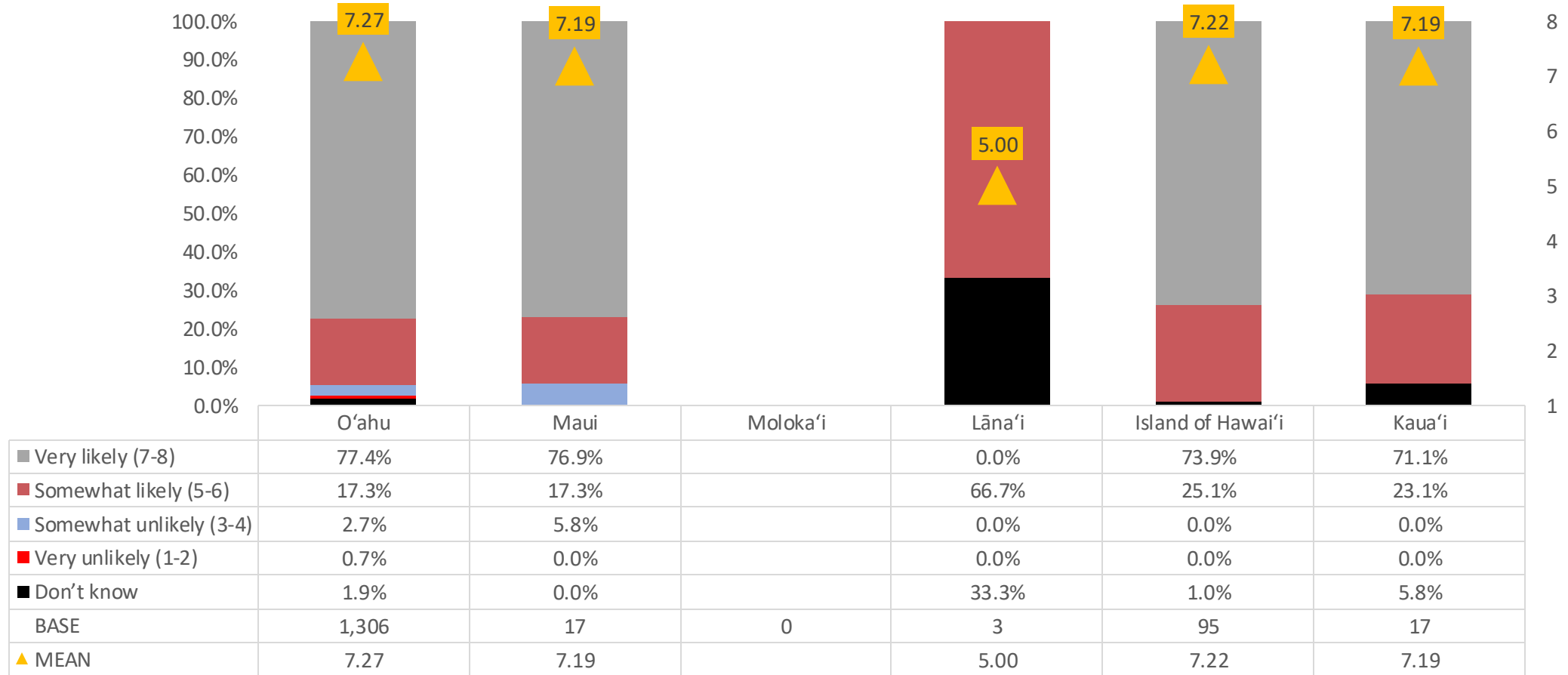
LIKELIHOOD OF RETURN VISIT - JAPAN

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



BRAND/ DESTINATION ADVOCACY – JAPAN

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



ACTIVITIES - SIGHTSEEING - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.0%	100.0%	0.0%	66.7%	99.0%	100.0%
On own (self-guided)/ driving around the island	72.1%	94.2%	0.0%	33.3%	73.4%	75.5%
Helicopter ride/ airplane tour	0.4%	0.0%	0.0%	0.0%	0.0%	6.1%
Boat tour/ submarine ride/ whale watching	8.7%	24.0%	0.0%	0.0%	2.2%	6.1%
Visiting towns/ communities	35.8%	34.7%	0.0%	66.7%	45.9%	37.7%
Private limousine/ van tour/ tour bus	14.0%	0.0%	0.0%	0.0%	21.6%	12.3%
Scenic views/ natural landmarks	21.3%	18.2%	0.0%	0.0%	38.4%	31.6%
Movie and TV filming location tours	5.9%	0.0%	0.0%	0.0%	1.0%	0.0%

ACTIVITIES - SIGHTSEEING - JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	86.1%	95.5%	95.5%	94.0%	93.6%	97.3%	97.4%
On own (self-guided)/ driving around the island	43.2%	68.8%	65.1%	63.3%	71.1%	72.7%	73.0%
Helicopter ride/ airplane tour	1.3%	2.3%	2.2%	1.1%	0.9%	0.6%	0.5%
Boat tour/ submarine ride/ whale watching	12.2%	9.7%	10.6%	12.7%	6.4%	8.6%	8.6%
Visiting towns/ communities	29.0%	31.2%	32.7%	29.0%	45.2%	39.3%	37.1%
Private limousine/ van tour/ tour bus	27.9%	19.5%	23.1%	21.2%	8.5%	11.4%	14.5%
Scenic views/ natural landmarks	25.4%	23.3%	20.8%	18.1%	31.6%	21.3%	22.5%
Movie and TV filming location tours	6.3%	4.1%	3.9%	4.5%	2.9%	4.1%	5.6%

ACTIVITIES - RECREATION - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	95.4%	94.2%	0.0%	100.0%	96.8%	80.7%
Beach/ sunbathing	74.8%	76.0%	0.0%	0.0%	55.3%	56.1%
Bodyboarding	0.8%	5.8%	0.0%	0.0%	1.0%	0.0%
Stand-up paddle boarding	2.5%	0.0%	0.0%	0.0%	2.0%	0.0%
Surfing	3.0%	5.8%	0.0%	0.0%	1.0%	6.1%
Canoe paddling	0.5%	5.8%	0.0%	0.0%	0.0%	0.0%
Kayaking	1.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Swimming in the ocean	38.4%	28.9%	0.0%	0.0%	25.2%	12.3%
Snorkeling	11.7%	17.3%	0.0%	0.0%	7.3%	13.2%
Freediving	0.2%	0.0%	0.0%	0.0%	0.0%	6.1%
Windsurfing/ kitesurfing	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Jet skiing/ parasailing	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Scuba diving	1.2%	0.0%	0.0%	0.0%	1.0%	0.0%
Fishing	0.3%	0.0%	0.0%	100.0%	1.0%	0.0%
Golf	4.3%	5.8%	0.0%	0.0%	12.2%	12.3%

ACTIVITIES - RECREATION - JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	88.5%	96.2%	96.0%	94.3%	93.9%	96.3%	95.7%
Beach/ sunbathing	68.3%	73.1%	71.6%	69.3%	71.9%	71.5%	74.5%
Bodyboarding	5.0%	3.7%	3.5%	1.5%	1.2%	2.4%	0.9%
Stand-up paddle boarding	*	*	*	1.5%	2.3%	4.5%	2.5%
Surfing	3.7%	3.6%	2.5%	2.9%	4.1%	4.9%	2.9%
Canoe paddling	2.8%	2.1%	2.7%	2.1%	1.0%	2.1%	0.5%
Kayaking	**	**	**	**	**	**	1.0%
Swimming in the ocean	NA	38.4%	34.2%	29.8%	34.7%	35.3%	38.1%
Snorkeling	NA	17.2%	19.3%	14.3%	11.9%	14.5%	11.9%
Freediving	NA	NA	NA	0.5%	0.6%	0.4%	0.3%
Windsurfing/ kitesurfing	0.5%	0.2%	0.2%	0.2%	0.7%	0.3%	0.1%
Jet skiing/ parasailing	3.7%	2.9%	2.4%	2.9%	0.0%	1.8%	2.6%
Scuba diving	3.0%	2.2%	1.7%	1.9%	0.3%	1.1%	1.1%
Fishing	1.2%	1.5%	0.8%	0.4%	0.3%	0.7%	0.6%
Golf	5.4%	7.5%	7.3%	6.9%	13.8%	6.1%	4.9%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	95.4%	94.2%	0.0%	100.0%	96.8%	80.7%
Running/ jogging/ fitness walking	26.8%	12.4%	0.0%	0.0%	24.4%	12.3%
Cycling	3.5%	0.0%	0.0%	0.0%	1.2%	0.0%
Spa	4.1%	0.0%	0.0%	0.0%	1.0%	0.0%
Hiking	21.6%	24.0%	0.0%	0.0%	24.7%	6.1%
Backpacking/ camping	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Agritourism	7.6%	11.6%	0.0%	0.0%	18.1%	6.1%
Sports event or tournament	1.4%	0.0%	0.0%	0.0%	2.0%	0.0%
Parks/ botanical gardens	24.1%	24.0%	0.0%	0.0%	30.6%	18.4%
Waterparks	1.9%	0.0%	0.0%	0.0%	5.3%	0.0%
Mountain tubing/ waterfall rappel	0.3%	0.0%	0.0%	0.0%	1.2%	0.0%
Zip-lining	0.5%	5.8%	0.0%	0.0%	0.0%	0.0%
Skydiving	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Horseback riding	2.2%	0.0%	0.0%	0.0%	3.1%	0.0%

ACTIVITIES - RECREATION - JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	88.5%	96.2%	96.0%	94.3%	93.9%	96.3%	95.7%
Running/ jogging/ fitness walking	14.9%	14.7%	12.0%	16.9%	28.2%	23.9%	26.7%
Cycling	NA	NA	NA	NA	5.8%	3.8%	3.3%
Spa	6.9%	6.5%	6.9%	6.8%	8.6%	3.7%	3.9%
Hiking	7.1%	7.4%	18.2%	18.4%	22.8%	24.1%	22.1%
Backpacking/ camping	*	*	0.2%	0.2%	0.3%	0.3%	0.2%
Agritourism	2.7%	12.2%	14.2%	11.5%	9.0%	6.1%	8.4%
Sports event or tournament	1.9%	1.8%	1.8%	1.3%	2.9%	0.7%	1.4%
Parks/ botanical gardens	20.1%	24.0%	21.3%	16.7%	25.8%	20.5%	24.8%
Waterparks	NA	3.5%	2.6%	1.8%	2.2%	2.1%	2.2%
Mountain tubing/ waterfall rappel	NA	0.7%	0.5%	0.5%	1.6%	0.0%	0.4%
Zip-lining	NA	0.7%	1.1%	0.9%	0.3%	0.6%	0.6%
Skydiving	NA	0.8%	0.7%	1.1%	1.4%	0.6%	1.2%
All-terrain vehicle (ATV)	NA	1.1%	1.0%	1.2%	0.3%	1.3%	1.3%
Horseback riding	NA	5.0%	4.3%	3.0%	1.5%	2.1%	2.3%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	98.3%	100.0%	0.0%	66.7%	95.8%	93.9%
Lunch/ sunset/ dinner/ evening cruise	13.5%	30.7%	0.0%	0.0%	6.6%	13.2%
Live music/ stage show	18.2%	23.1%	0.0%	0.0%	9.8%	19.3%
Nightclub/ dancing/ bar/ karaoke	2.4%	5.8%	0.0%	0.0%	1.0%	0.0%
Fine dining	37.1%	11.6%	0.0%	0.0%	12.7%	30.7%
Family restaurant	26.3%	24.0%	0.0%	0.0%	23.4%	0.0%
Fast food	54.2%	34.7%	0.0%	0.0%	35.7%	24.5%
Food truck	27.7%	17.3%	0.0%	0.0%	5.3%	19.3%
Café/ coffee house	58.4%	28.9%	0.0%	33.3%	44.0%	43.9%
Ethnic dining	7.8%	5.8%	0.0%	0.0%	3.4%	0.0%
Farm-to-table cuisine	15.6%	28.9%	0.0%	33.3%	24.8%	30.7%
Prepared own meal	28.3%	40.4%	0.0%	0.0%	43.4%	30.7%

ACTIVITIES - ENTERTAINMENT & DINING - JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	92.6%	98.3%	97.5%	97.0%	98.3%	98.0%	98.2%
Lunch/ sunset/ dinner/ evening cruise	46.6%	15.7%	13.4%	16.3%	8.4%	13.2%	13.5%
Live music/ stage show	17.4%	20.3%	17.9%	15.3%	18.8%	18.8%	18.2%
Nightclub/ dancing/ bar/ karaoke	4.1%	6.6%	4.8%	5.6%	3.3%	3.4%	2.4%
Fine dining	36.2%	45.4%	42.6%	35.4%	35.6%	34.2%	35.9%
Family restaurant	26.3%	23.4%	24.0%	25.9%	26.5%	26.2%	26.3%
Fast food	46.4%	53.0%	52.6%	56.2%	46.1%	52.6%	53.3%
Food truck	NA	14.6%	13.4%	15.5%	27.1%	23.9%	26.6%
Café/ coffee house	48.4%	53.8%	50.2%	49.9%	56.0%	56.6%	57.7%
Ethnic dining	7.0%	10.3%	8.6%	6.0%	12.6%	9.4%	7.6%
Farm-to-table cuisine	NA	NA	NA	NA	16.8%	16.3%	16.4%
Prepared own meal	16.7%	18.7%	19.5%	14.5%	43.9%	24.6%	29.4%

ACTIVITIES - SHOPPING - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	97.9%	94.2%	0.0%	66.7%	98.0%	92.9%
Malls/ department stores	85.6%	36.4%	0.0%	0.0%	44.8%	36.8%
Designer boutiques	16.4%	11.6%	0.0%	0.0%	1.2%	0.0%
Hotel/ resort stores	34.2%	17.3%	0.0%	0.0%	21.9%	12.3%
Swap meet/ flea market	3.4%	5.8%	0.0%	0.0%	1.0%	0.0%
Discount/ outlet stores	27.4%	24.0%	0.0%	0.0%	9.3%	12.3%
Supermarkets	59.7%	52.9%	0.0%	33.3%	65.8%	49.1%
Farmer's market	20.6%	23.1%	0.0%	0.0%	27.4%	12.3%
Convenience stores	58.5%	5.8%	0.0%	0.0%	17.2%	6.1%
Duty-free stores	22.6%	5.8%	0.0%	0.0%	1.0%	0.0%
Hawai'i-made products	20.7%	28.9%	0.0%	0.0%	21.3%	24.5%
Local shops and artisans	10.7%	46.2%	0.0%	33.3%	25.9%	43.9%
Local fashion designers	2.8%	11.6%	0.0%	0.0%	6.1%	6.1%

ACTIVITIES - SHOPPING - JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	96.6%	97.6%	98.0%	97.6%	98.8%	98.3%	97.8%
Malls/ department stores	82.2%	79.9%	78.2%	81.5%	74.6%	81.4%	83.2%
Designer boutiques	33.5%	25.1%	20.2%	25.0%	18.1%	16.8%	15.6%
Hotel/ resort stores	39.2%	35.4%	34.7%	33.8%	31.2%	31.2%	33.5%
Swap meet/ flea market	8.9%	3.6%	3.6%	3.1%	6.5%	4.7%	3.4%
Discount/ outlet stores	34.1%	23.7%	20.8%	25.3%	27.6%	25.4%	26.7%
Supermarkets	57.7%	65.7%	68.6%	69.1%	60.6%	56.9%	60.3%
Farmer's market	18.6%	18.1%	19.1%	15.1%	25.9%	19.5%	21.3%
Convenience stores	54.1%	45.6%	42.7%	47.4%	44.8%	53.9%	56.2%
Duty-free stores	43.6%	42.1%	32.1%	38.4%	8.3%	19.0%	21.4%
Hawai'i-made products	NA	NA	NA	NA	25.7%	20.2%	20.8%
Local shops and artisans	15.3%	10.7%	11.4%	11.8%	22.0%	14.6%	12.5%
Local fashion designers	NA	NA	NA	NA	NA	NA	3.2%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	55.5%	71.1%	0.0%	33.3%	59.2%	57.1%
Historic military sites and museums	11.4%	18.2%	0.0%	0.0%	12.5%	6.1%
Historic Hawaiian sites and museums	15.7%	28.9%	0.0%	0.0%	21.2%	18.4%
Other historical sites, museums, and homes	5.6%	24.0%	0.0%	33.3%	15.8%	19.3%
Art museums	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Art galleries and exhibitions	4.1%	5.8%	0.0%	0.0%	4.1%	6.1%
Lū'au/ Polynesian show/ hula show	16.8%	17.3%	0.0%	0.0%	9.5%	0.0%
Lesson- e.g. ukulele, hula, canoe, lei making	6.2%	5.8%	0.0%	0.0%	3.2%	7.1%
Play/ concert/ theatre	3.1%	5.8%	0.0%	0.0%	0.0%	0.0%
Art/ craft fair	3.1%	5.8%	0.0%	0.0%	2.2%	6.1%
Festival/ event	5.0%	0.0%	0.0%	0.0%	5.4%	0.0%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	39.9%	55.5%	55.2%	53.1%	51.7%	54.4%	55.8%
Historic military sites and museums	11.3%	18.1%	16.0%	14.7%	9.4%	12.6%	11.8%
Historic Hawaiian sites and museums	NA	NA	NA	NA	15.3%	16.3%	16.3%
Other historical sites, museums, and homes	10.6%	18.1%	17.5%	14.3%	6.9%	6.8%	6.8%
Art museums	*	*	*	*	1.9%	3.3%	2.6%
Art galleries and exhibitions	*	*	*	*	5.9%	3.8%	4.2%
Lū'au/ Polynesian show/ hula show	10.5%	12.9%	14.0%	13.3%	14.1%	14.3%	16.6%
Lesson- e.g. ukulele, hula, canoe, lei making	6.3%	6.4%	7.1%	7.0%	4.4%	5.1%	6.2%
Play/ concert/ theatre	2.3%	3.1%	3.6%	3.1%	1.5%	3.4%	3.0%
Art/ craft fair	2.2%	3.4%	3.4%	4.4%	4.8%	2.8%	3.2%
Festival/ event	3.2%	3.1%	2.6%	2.2%	5.4%	4.4%	5.0%

* Combined Museum/ Art galleries as single option

ACTIVITIES - TRANSPORTATION - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.8%	94.2%	0.0%	66.7%	95.8%	93.9%
Airport shuttle	21.1%	24.0%	0.0%	0.0%	11.8%	6.1%
Trolley	51.4%	0.0%	0.0%	0.0%	4.4%	0.0%
Public bus	27.2%	23.1%	0.0%	0.0%	5.6%	0.0%
Tour bus/ tour van	18.4%	5.8%	0.0%	0.0%	24.0%	12.3%
Taxi/ limo	30.5%	0.0%	0.0%	0.0%	18.3%	12.3%
Rental car	24.0%	52.9%	0.0%	66.7%	50.2%	75.5%
Ride share	24.3%	0.0%	0.0%	0.0%	13.9%	18.4%
Car share	1.2%	5.8%	0.0%	0.0%	0.0%	0.0%
Bicycle rental	3.7%	5.8%	0.0%	0.0%	0.0%	0.0%

ACTIVITIES – TRANSPORTATION – JAPAN

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.6%	95.9%	96.9%	96.8%	96.4%	96.2%	96.7%
Airport shuttle	32.0%	24.0%	25.5%	28.0%	12.7%	19.5%	20.8%
Trolley	56.1%	46.1%	44.1%	53.6%	19.6%	37.9%	48.4%
Public bus	19.2%	16.9%	13.3%	16.0%	24.8%	27.6%	26.3%
Tour bus/ tour van	31.2%	27.0%	31.1%	27.5%	8.6%	15.4%	18.6%
Taxi/ limo	33.2%	31.7%	28.5%	27.8%	33.4%	34.1%	29.6%
Rental car	23.4%	33.1%	32.8%	23.1%	45.3%	28.5%	26.8%
Ride share	NA	3.2%	5.2%	5.3%	22.9%	20.1%	23.7%
Car share	NA	NA	NA	NA	1.7%	1.3%	1.2%
Bicycle rental	NA	2.9%	2.8%	4.0%	4.7%	3.8%	3.6%

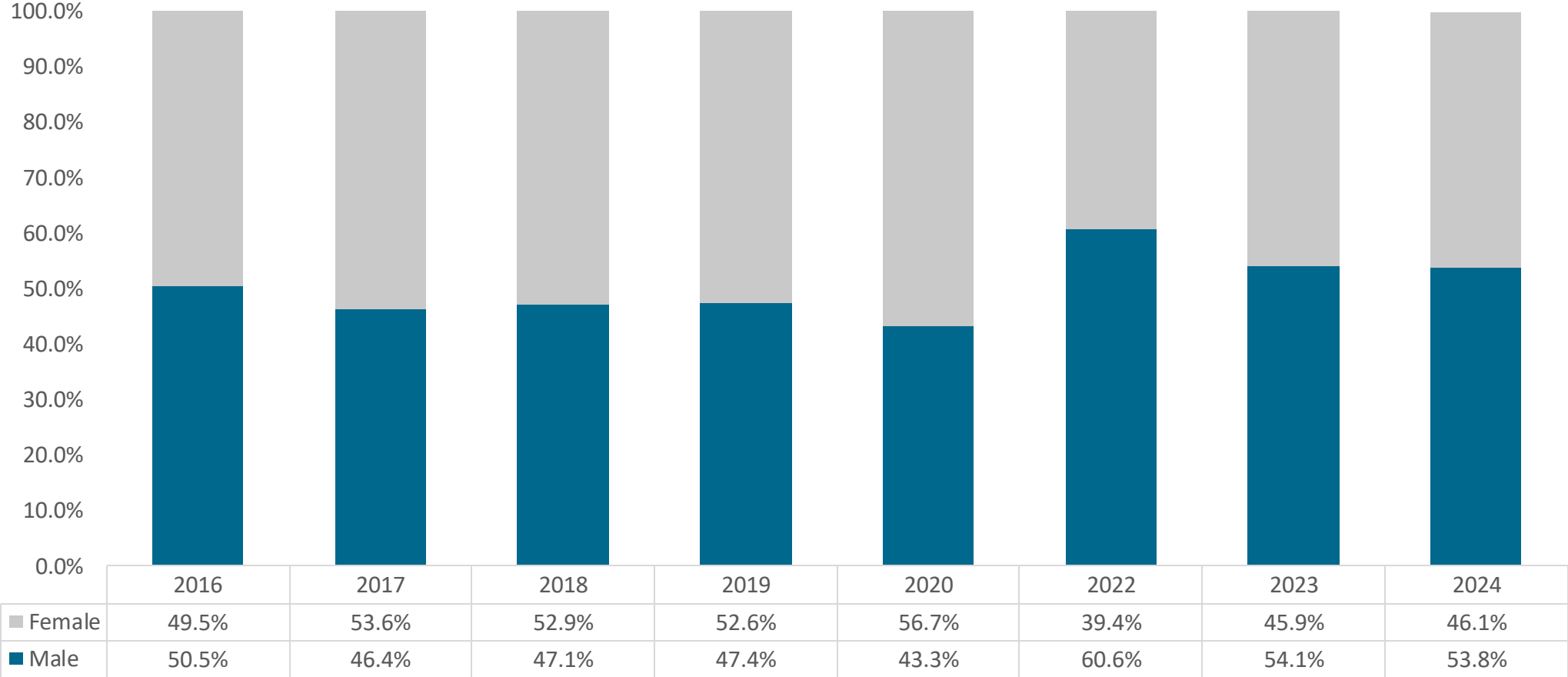
ACTIVITIES - OTHER - JAPAN

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	15.8%	70.2%	0.0%	0.0%	14.9%	43.9%
Visiting friends/ relatives	14.3%	64.4%	0.0%	0.0%	12.7%	43.9%
Giving back to the local community	1.6%	5.8%	0.0%	0.0%	3.2%	0.0%

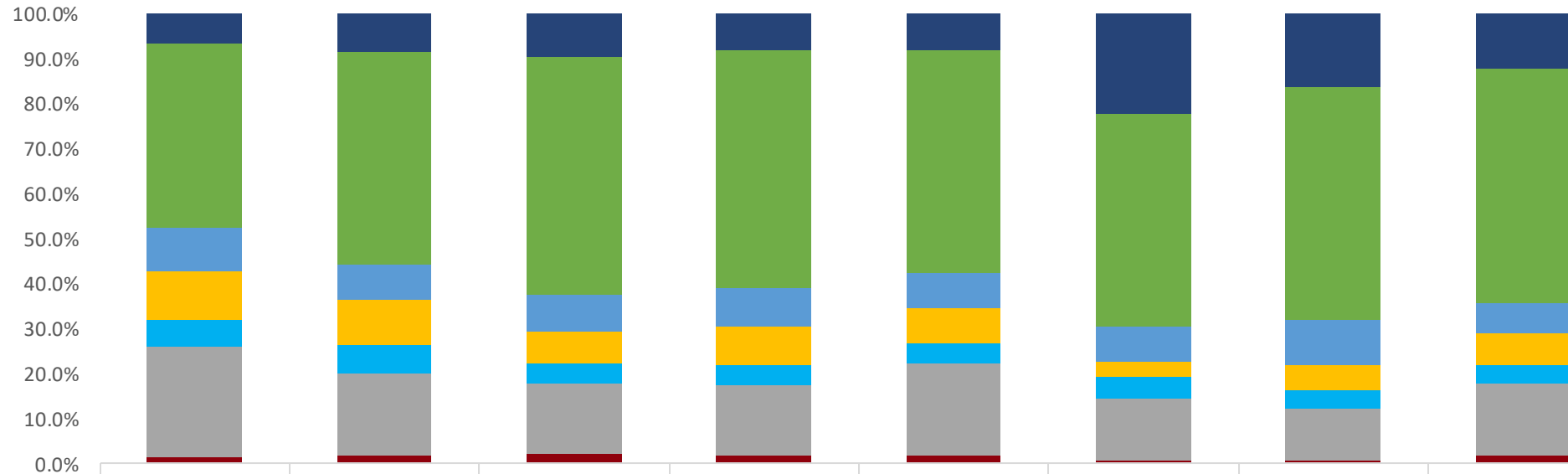
ACTIVITIES - OTHER - JAPAN

	2018	2019	2020	2022	2023	2024
TOTAL	12.6%	11.8%	13.5%	28.6%	19.1%	16.6%
Visiting friends/ relatives	11.9%	11.3%	12.4%	28.0%	18.4%	15.0%
Giving back to the local community	0.9%	0.7%	1.3%	1.2%	1.0%	1.8%

VISITOR PROFILE - GENDER - JAPAN

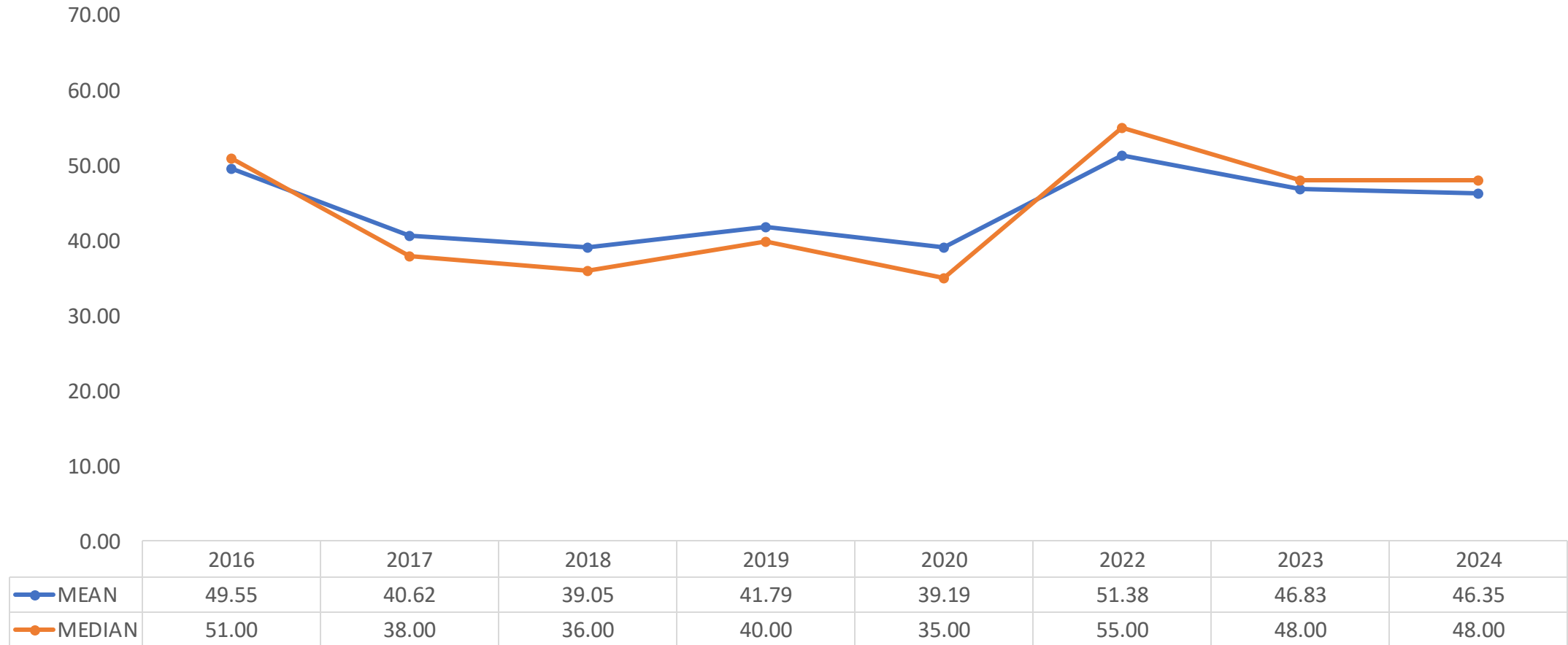


VISITOR PROFILE - EDUCATION - JAPAN

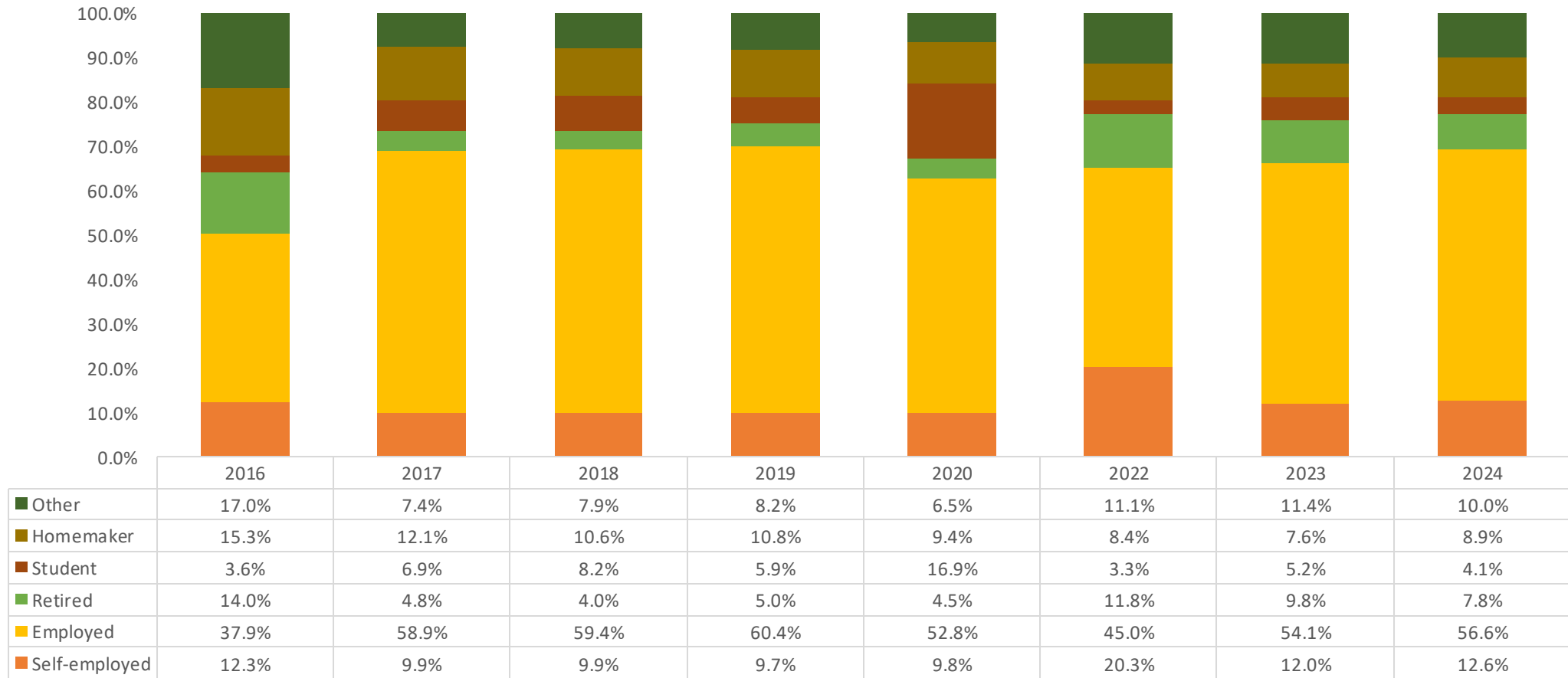


	2016	2017	2018	2019	2020	2022	2023	2024
■ Post-Graduate	6.5%	8.4%	9.8%	8.4%	8.1%	22.3%	16.3%	12.2%
■ College Grad	41.0%	47.5%	52.9%	52.6%	49.6%	47.4%	51.8%	52.2%
■ Associate Degree	9.9%	7.5%	8.0%	8.6%	7.7%	7.7%	10.0%	6.6%
■ Vocational/ Tech	10.7%	10.2%	7.3%	8.6%	8.1%	3.5%	5.6%	7.1%
■ Some College	5.8%	6.2%	4.4%	4.5%	4.3%	4.9%	4.1%	4.3%
■ H.S. Grad	24.6%	18.2%	15.6%	15.5%	20.6%	13.6%	11.5%	15.7%
■ Some / No H.S.	1.4%	1.9%	2.1%	1.9%	1.6%	0.6%	0.7%	1.9%

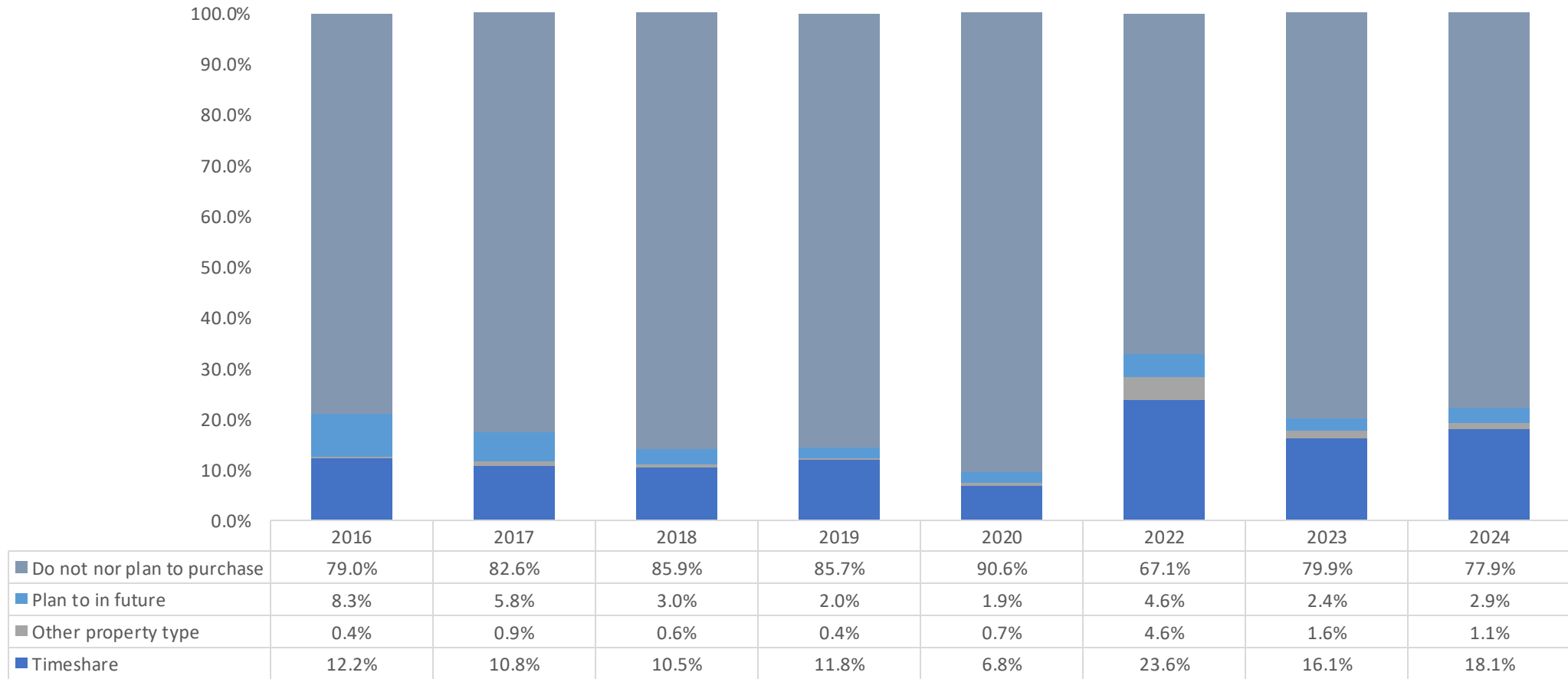
VISITOR PROFILE - AGE - JAPAN



VISITOR PROFILE - EMPLOYMENT STATUS - JAPAN



VISITOR PROFILE - HAWAI‘I PROPERTY OWNER - JAPAN



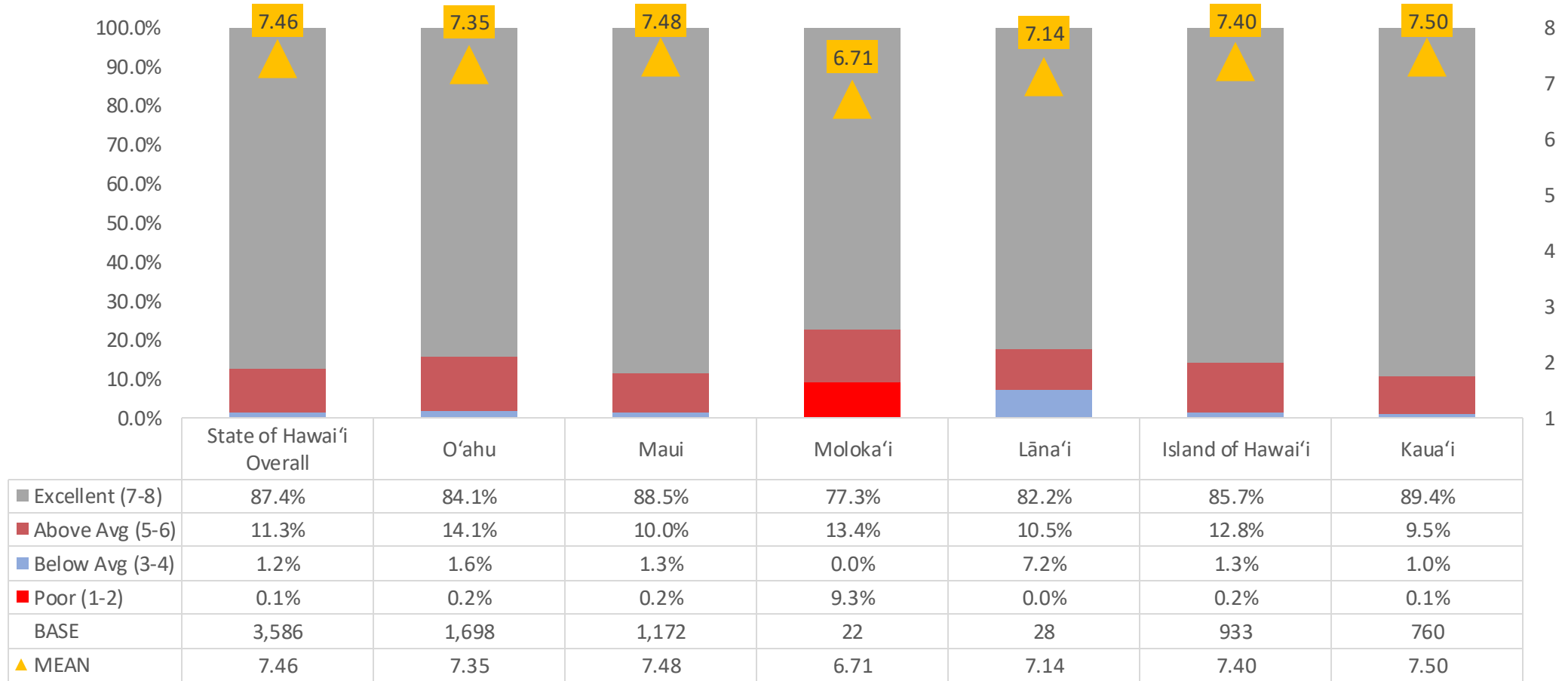
VISITOR PROFILE - HOUSEHOLD INCOME (YEN)

	2018	2019	2020	2022	2023	2024
< ¥3.5 million	21.2%	17.0%	23.3%	7.6%	11.1%	10.6%
¥3.5 - ¥4.5 million	14.1%	13.6%	12.8%	3.9%	9.5%	9.3%
¥4.5 - ¥5.5 million	10.8%	10.5%	10.0%	7.8%	9.8%	9.4%
¥5.5 - ¥6.5 million	7.4%	7.8%	7.5%	7.0%	7.8%	6.6%
¥6.5 - ¥7.5 million	7.0%	6.2%	5.2%	4.8%	5.9%	5.6%
¥7.5 - ¥8.5 million	6.8%	7.7%	9.2%	9.5%	8.6%	8.2%
¥8.5 - ¥10.0 million	8.7%	9.9%	9.5%	10.5%	11.7%	11.2%
¥10.0 - ¥15.0 million	13.3%	15.3%	13.1%	22.0%	14.7%	20.3%
¥15.0 - ¥20.0 million	4.7%	5.8%	3.9%	11.6%	9.2%	7.9%
¥20.0 million +	5.9%	6.4%	5.5%	15.3%	11.6%	10.9%

Section 16 – Canada

OVERALL SATISFACTION - MOST RECENT TRIP - CANADA

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



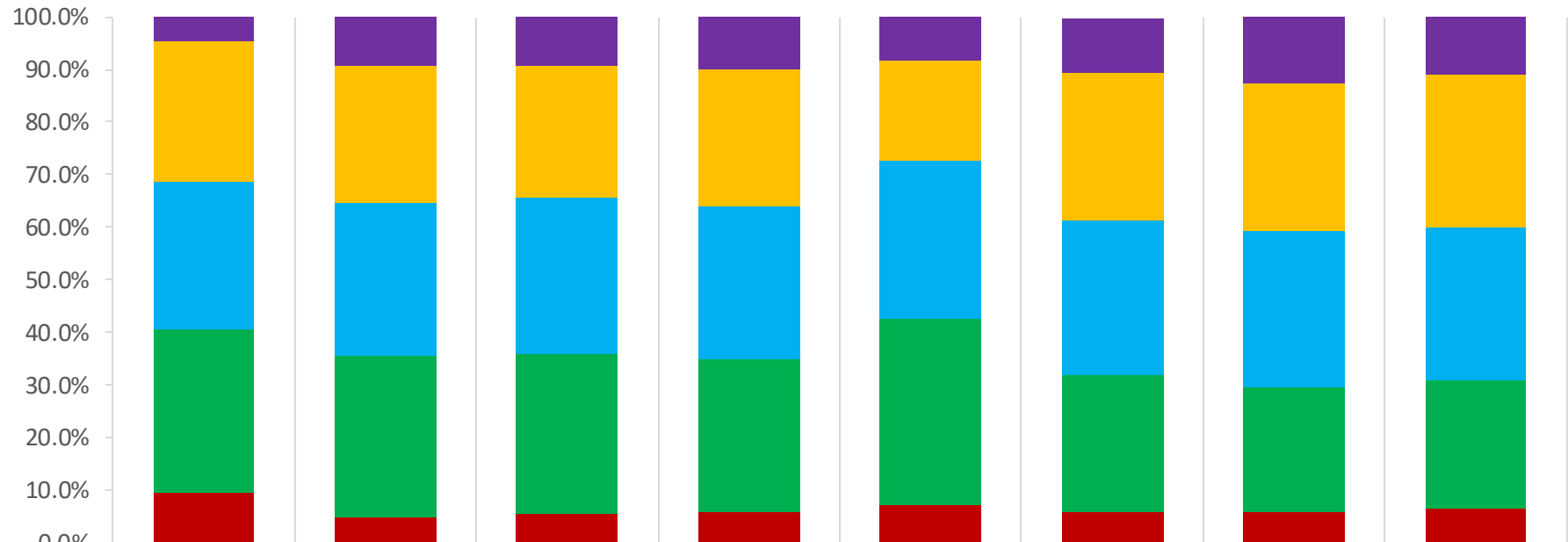
PRIMARY PURPOSE OF TRIP – CANADA

	2018	2019	2020	2022	2023	2024
Vacation	74.3%	74.5%	84.6%	79.8%	79.0%	77.7%
Visit friends/ relatives	3.1%	2.9%	4.3%	5.3%	6.0%	5.9%
Convention/ conference	1.8%	1.4%	1.8%	1.4%	2.9%	2.7%
Honeymoon	2.8%	2.6%	1.7%	3.3%	2.1%	2.2%
Anniversary/ birthday	5.7%	6.8%	1.6%	2.0%	2.3%	2.1%
Sports event	0.0%	0.0%	0.5%	1.4%	1.3%	1.9%

PRIMARY + SECONDARY PURPOSE OF TRIP - CANADA

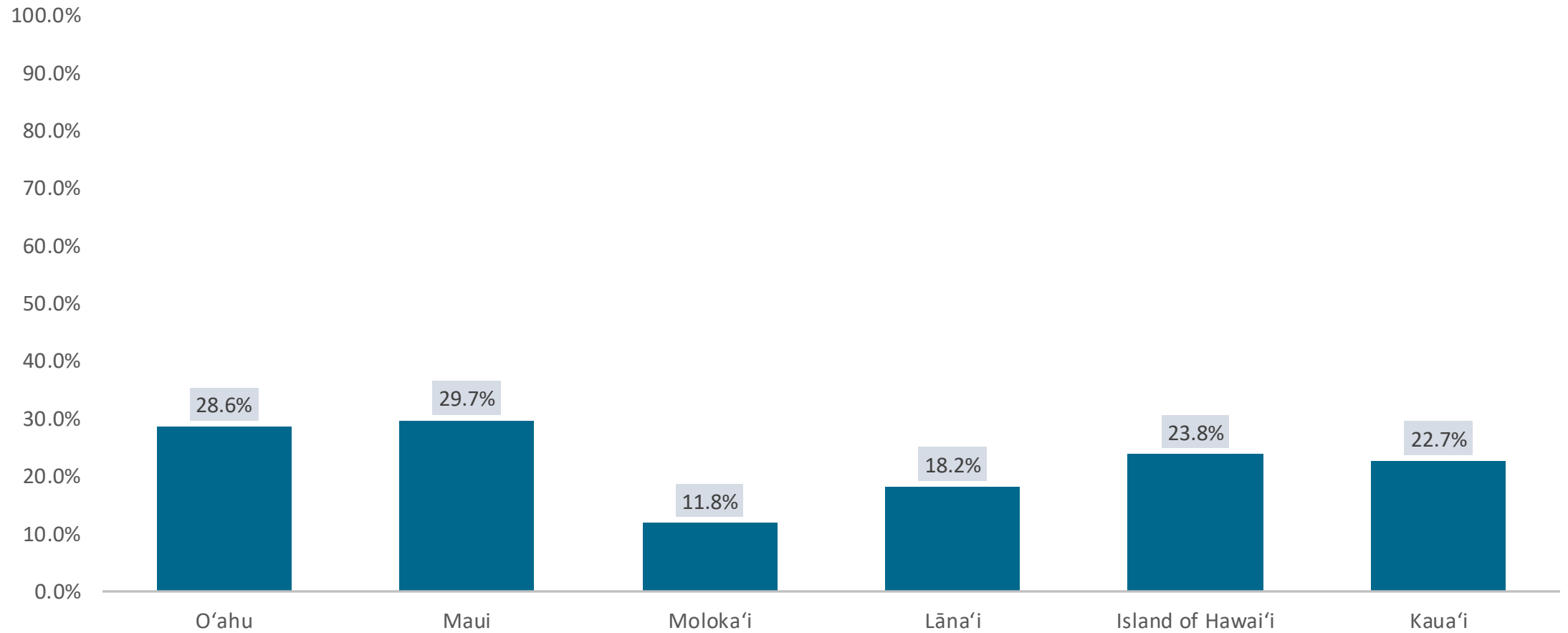
	2018	2019	2020	2022	2023	2024
Vacation	91.4%	91.7%	94.8%	92.7%	92.8%	92.1%
Visit friends/ relatives	8.4%	7.1%	11.7%	11.9%	12.3%	12.3%
Anniversary/ birthday	12.1%	13.6%	3.2%	4.1%	4.9%	4.4%
Convention/ conference	2.5%	2.1%	2.8%	1.9%	3.6%	3.5%
Honeymoon	2.9%	2.9%	2.0%	4.4%	2.7%	3.0%
Sports event	0.0%	0.0%	1.3%	1.8%	1.5%	2.4%
Other business	0.0%	0.0%	1.2%	1.9%	2.1%	2.2%
Incentive trip	1.5%	1.2%	1.8%	2.1%	2.1%	2.0%
Attend wedding/ vow renewal	3.2%	2.4%	0.8%	2.0%	1.4%	1.6%

VACATION TRIP DESCRIPTION - CANADA

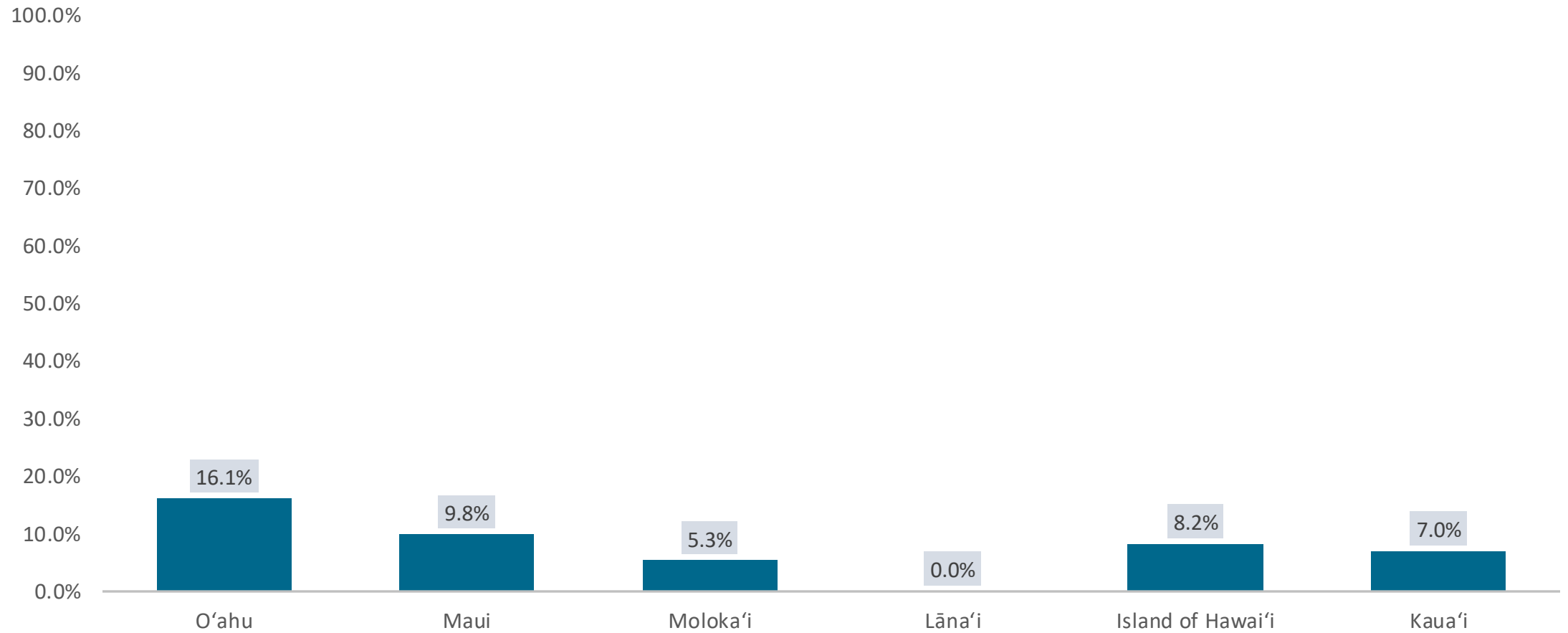


	2016	2017	2018	2019	2020	2022	2023	2024
Once-in-a-lifetime	4.6%	9.4%	9.3%	10.0%	8.2%	10.5%	12.6%	11.1%
Special occasion	26.8%	25.9%	25.3%	26.2%	19.1%	27.9%	28.2%	29.0%
More special than most trips	28.2%	29.1%	29.5%	29.1%	29.9%	29.5%	29.7%	29.1%
Annual/ Semi-annual trip	31.1%	30.8%	30.7%	29.0%	35.5%	26.1%	23.7%	24.3%
Other	9.3%	4.8%	5.3%	5.8%	7.2%	5.8%	5.9%	6.5%

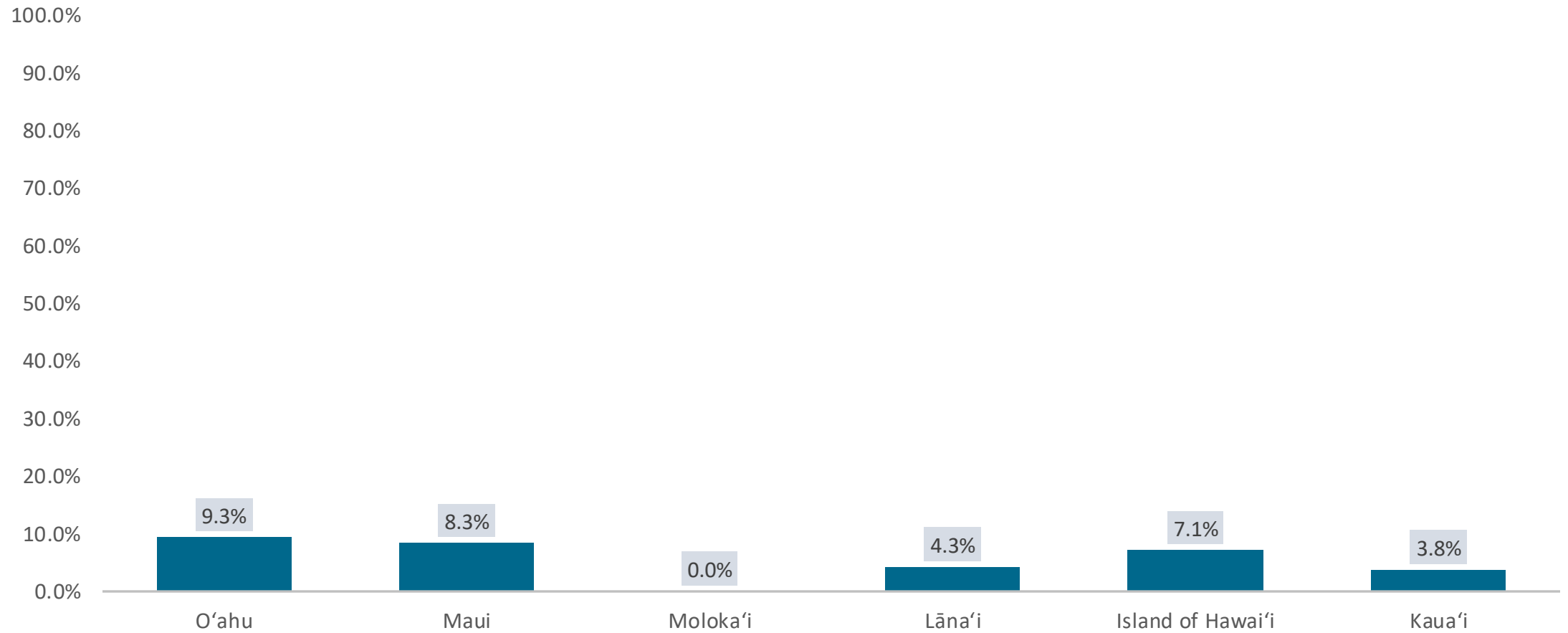
ADVERTISING AWARENESS - CANADA



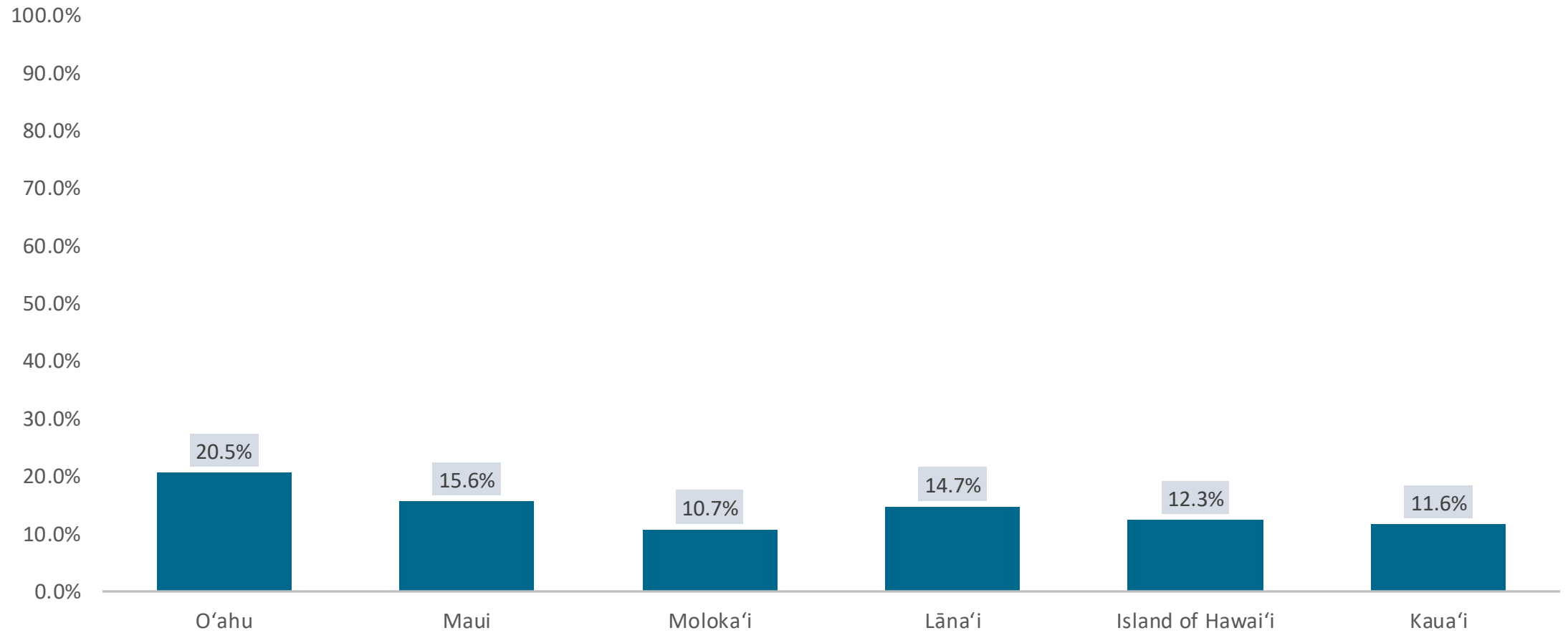
IMPACT OF LOCATION FILMING - CANADA



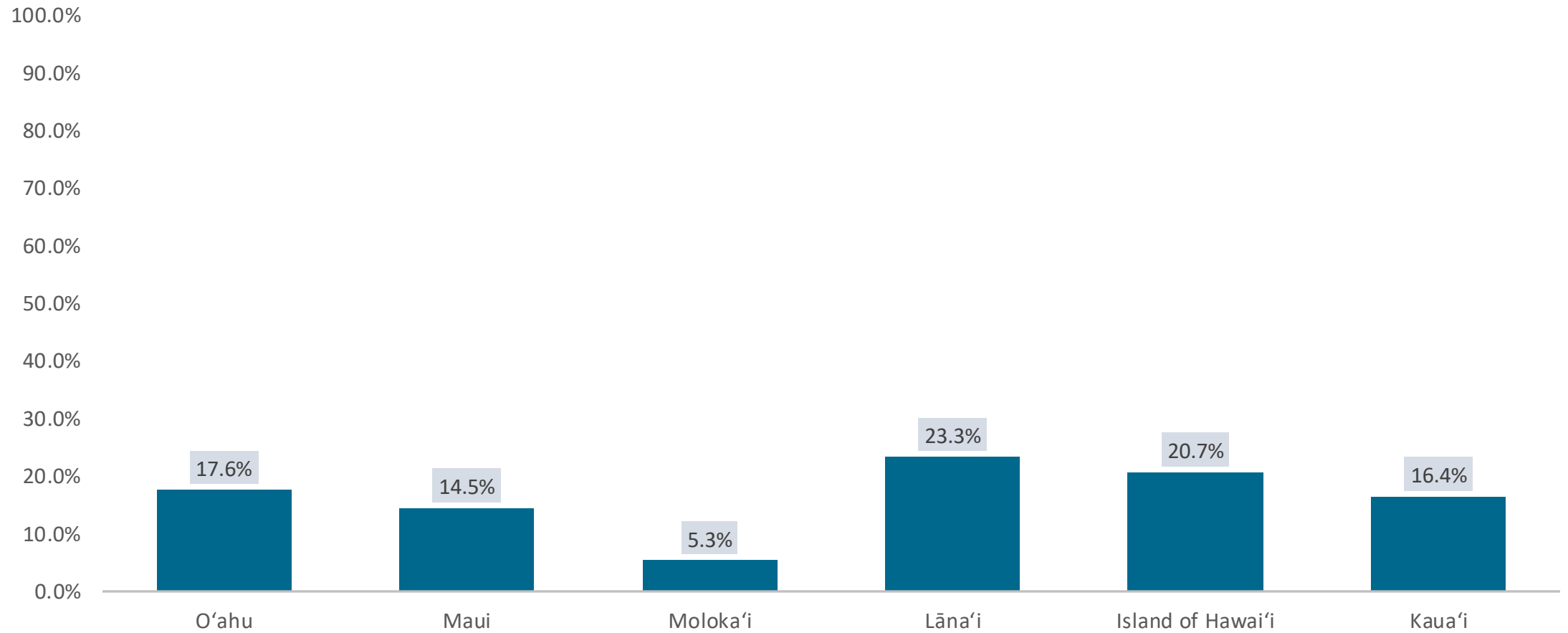
IMPACT OF HAWAIIAN MUSIC - CANADA



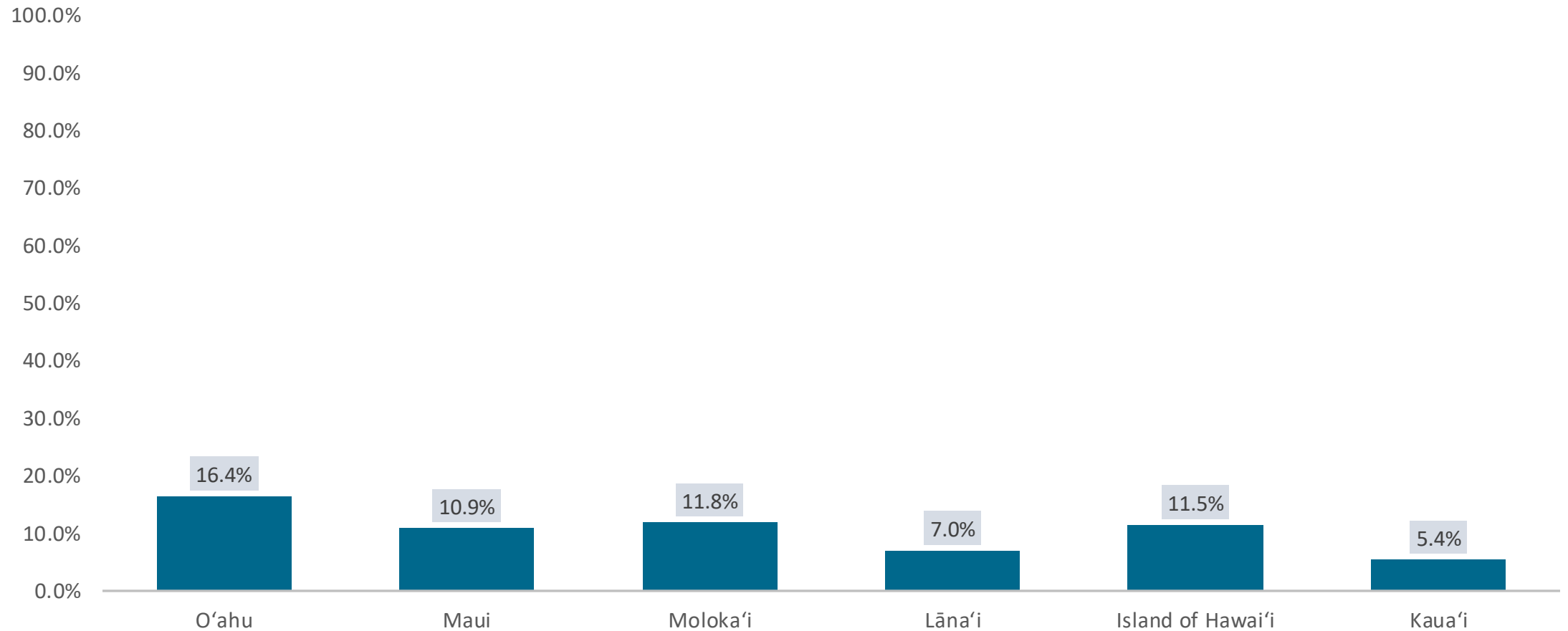
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - CANADA



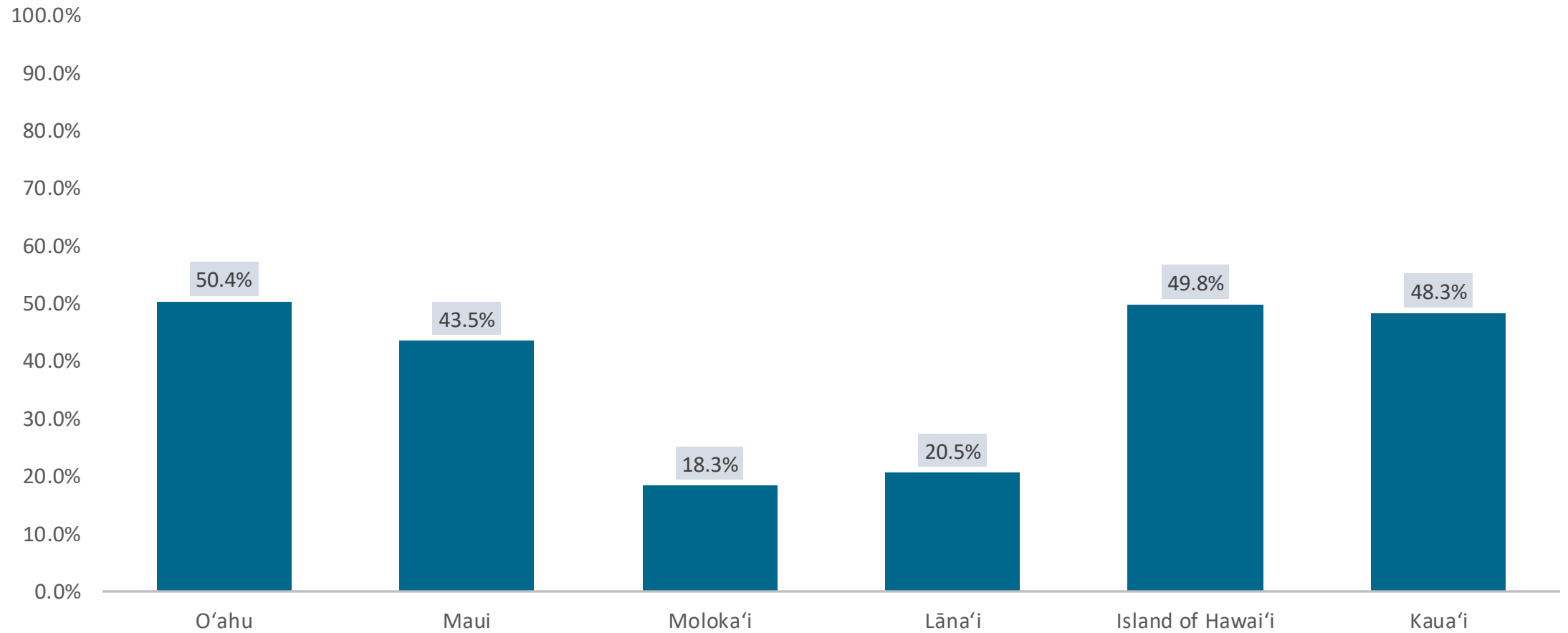
IMPACT OF OUTDOOR/ SPORTING EVENTS - CANADA



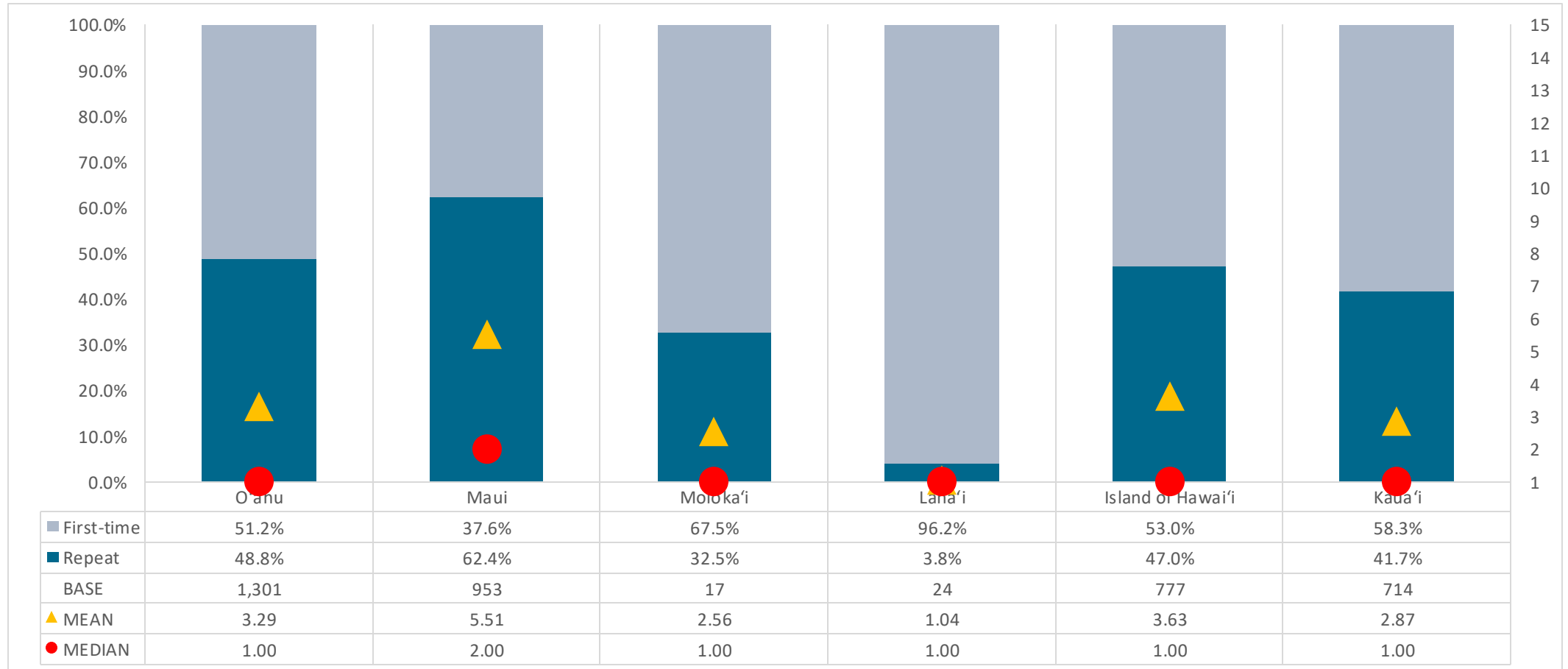
IMPACT OF HAWAIIAN CULTURAL EVENTS - CANADA



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - CANADA



1ST TIME VS REPEAT VISITORS - CANADA

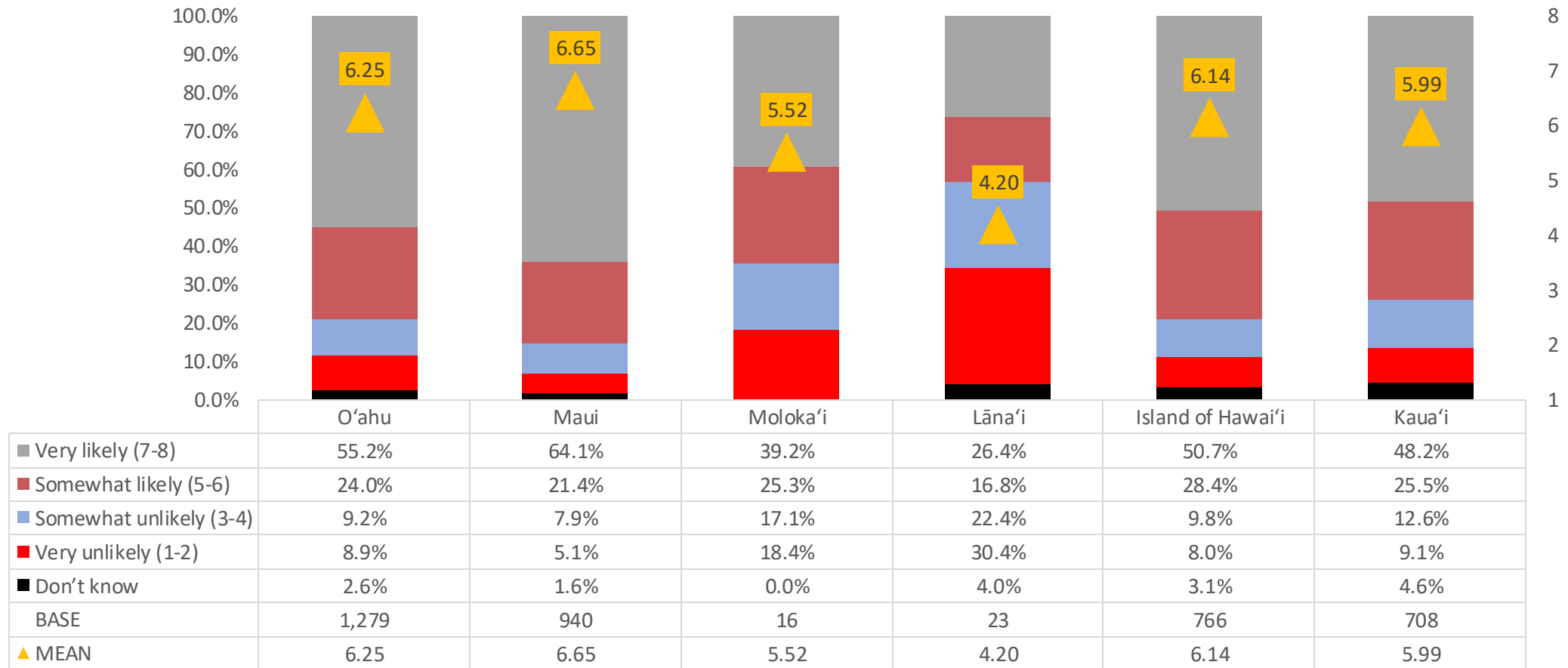


TRAVEL PARTY MEMBERS - CANADA

	2016	2017	2018	2019	2020	2022	2023	2024
My spouse	69.7%	66.6%	63.3%	62.1%	66.4%	64.2%	61.3%	62.4%
Other adult members of my family	27.2%	25.1%	28.6%	28.3%	27.3%	29.9%	27.7%	28.0%
My child(ren)/ grandchild(ren) under 18	23.2%	23.9%	22.9%	23.7%	17.7%	25.1%	23.9%	23.3%
My friends/ associates	18.6%	17.9%	18.2%	17.0%	17.9%	16.9%	16.0%	16.2%
Myself only (traveled alone/ no one else)	6.6%	6.4%	6.0%	6.0%	6.4%	6.0%	7.4%	7.4%
My girlfriend/ boyfriend	6.7%	7.0%	8.3%	8.6%	6.9%	7.1%	7.0%	5.6%
Same-gender partner	0.6%	0.9%	0.9%	1.2%	0.9%	0.5%	1.0%	0.9%

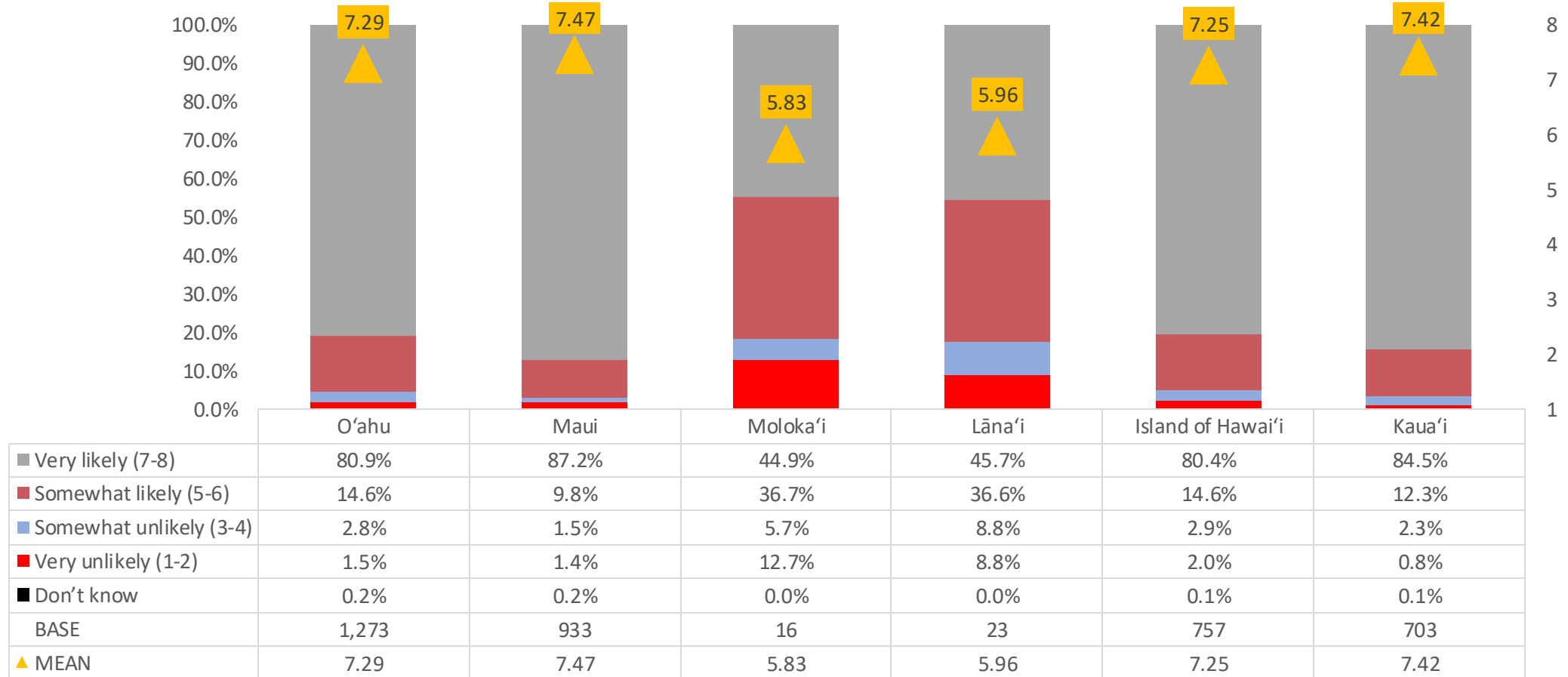
LIKELIHOOD OF RETURN VISIT - CANADA

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



BRAND/ DESTINATION ADVOCACY – CANADA

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



ACTIVITIES - SIGHTSEEING - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.0%	98.2%	100.0%	100.0%	99.0%	98.9%
On own (self-guided)/ driving around the island	75.9%	87.2%	87.9%	42.6%	89.5%	84.8%
Helicopter ride/ airplane tour	1.3%	3.2%	0.0%	0.0%	2.4%	10.6%
Boat tour/ submarine ride/ whale watching	18.6%	24.3%	7.4%	34.9%	22.5%	27.0%
Visiting towns/ communities	47.2%	59.8%	42.9%	38.3%	60.1%	62.3%
Private limousine/ van tour/ tour bus	16.1%	6.2%	6.1%	24.4%	7.6%	5.9%
Scenic views/ natural landmarks	63.6%	62.3%	61.0%	29.6%	67.8%	73.0%
Movie and TV filming location tours	13.5%	0.9%	0.0%	0.0%	1.8%	4.8%

ACTIVITIES - SIGHTSEEING - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.9%	96.7%	96.2%	95.7%	98.3%	98.5%	98.2%
On own (self-guided)/ driving around the island	87.5%	85.5%	84.0%	84.0%	85.6%	84.3%	84.0%
Helicopter ride/ airplane tour	10.1%	8.9%	7.6%	3.6%	6.3%	5.0%	4.1%
Boat tour/ submarine ride/ whale watching	29.6%	25.2%	25.7%	27.8%	26.5%	25.6%	23.6%
Visiting towns/ communities	40.0%	59.5%	57.0%	58.0%	59.7%	56.8%	57.1%
Private limousine/ van tour/ tour bus	11.2%	10.8%	9.7%	9.1%	9.5%	10.6%	10.1%
Scenic views/ natural landmarks	76.6%	68.0%	65.2%	63.4%	67.7%	66.5%	66.0%
Movie and TV filming location tours	5.9%	5.0%	5.1%	3.7%	5.9%	5.8%	6.4%

ACTIVITIES - RECREATION - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	97.3%	98.6%	93.9%	100.0%	98.3%	96.1%
Beach/ sunbathing	88.0%	91.1%	81.8%	87.0%	85.0%	82.7%
Bodyboarding	8.3%	13.9%	13.4%	0.0%	11.5%	11.6%
Stand-up paddle boarding	3.9%	3.3%	0.0%	0.0%	3.4%	1.9%
Surfing	10.7%	6.7%	6.1%	0.0%	5.5%	7.2%
Canoe paddling	1.3%	1.8%	0.0%	0.0%	3.9%	1.9%
Kayaking	2.4%	2.1%	0.0%	0.0%	3.8%	8.5%
Swimming in the ocean	69.2%	73.3%	41.6%	59.3%	69.0%	61.0%
Snorkeling	35.3%	49.9%	13.4%	30.6%	53.1%	43.9%
Freediving	1.3%	1.6%	6.1%	0.0%	1.6%	0.6%
Windsurfing/ kitesurfing	0.0%	1.0%	0.0%	0.0%	0.3%	0.0%
Jet skiing/ parasailing	1.8%	0.7%	0.0%	0.0%	0.9%	0.0%
Scuba diving	1.6%	2.5%	0.0%	0.0%	5.1%	1.7%
Fishing	1.1%	1.6%	0.0%	0.0%	2.7%	1.2%
Golf	3.4%	10.6%	0.0%	5.2%	9.4%	6.2%

ACTIVITIES - RECREATION - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.7%	98.2%	98.6%	98.2%	98.7%	98.3%	98.0%
Beach/ sunbathing	91.2%	90.6%	90.7%	89.9%	90.3%	89.1%	87.8%
Bodyboarding	23.9%	17.1%	17.2%	12.4%	14.9%	12.6%	11.4%
Stand-up paddle boarding	*	*	*	3.8%	5.6%	5.2%	3.4%
Surfing	12.0%	10.5%	10.3%	7.5%	10.3%	9.9%	8.1%
Canoe paddling	8.4%	7.0%	6.4%	5.9%	7.8%	5.5%	2.2%
Kayaking	**	**	**	**	**	**	4.0%
Swimming in the ocean	NA	76.5%	77.6%	69.7%	77.4%	74.6%	70.0%
Snorkeling	NA	54.0%	55.3%	46.8%	52.1%	49.4%	45.2%
Freediving	NA	NA	NA	1.0%	1.3%	1.2%	1.4%
Windsurfing/ kitesurfing	0.8%	0.5%	0.3%	0.3%	0.2%	0.4%	0.3%
Jet skiing/ parasailing	1.3%	1.2%	1.0%	0.5%	1.1%	1.0%	1.0%
Scuba diving	5.0%	3.6%	3.1%	3.3%	3.3%	2.4%	2.5%
Fishing	2.5%	2.4%	2.4%	2.2%	2.3%	2.4%	1.7%
Golf	9.5%	8.0%	7.5%	9.1%	9.6%	8.1%	7.3%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.3%	98.6%	93.9%	100.0%	98.3%	96.1%
Running/ jogging/ fitness walking	30.0%	39.1%	22.1%	13.0%	28.5%	28.7%
Cycling	2.2%	2.8%	7.4%	0.0%	5.4%	7.0%
Spa	5.4%	5.2%	0.0%	5.2%	4.3%	3.1%
Hiking	43.2%	42.1%	47.6%	9.6%	50.6%	49.4%
Backpacking/ camping	0.8%	1.7%	0.0%	0.0%	2.0%	3.1%
Agritourism	12.3%	7.9%	7.4%	0.0%	15.0%	6.7%
Sports event or tournament	3.2%	1.0%	0.0%	0.0%	5.0%	1.2%
Parks/ botanical gardens	40.1%	33.2%	34.2%	10.5%	42.1%	40.1%
Waterparks	2.0%	1.4%	0.0%	0.0%	1.2%	0.4%
Mountain tubing/ waterfall rappel	0.4%	0.5%	0.0%	0.0%	0.9%	6.8%
Zip-lining	1.5%	2.2%	0.0%	0.0%	2.3%	2.0%
Skydiving	0.7%	0.3%	0.0%	0.0%	0.6%	0.0%
All-terrain vehicle (ATV)	4.7%	0.5%	0.0%	0.0%	1.9%	2.6%
Horseback riding	1.1%	0.3%	0.0%	0.0%	1.4%	0.7%

ACTIVITIES - RECREATION - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.7%	98.2%	98.6%	98.2%	98.7%	98.3%	98.0%
Running/ jogging/ fitness walking	41.0%	33.1%	28.9%	37.1%	32.2%	29.9%	32.7%
Cycling	NA	NA	NA	NA	5.9%	5.3%	4.2%
Spa	6.6%	6.7%	6.4%	4.8%	5.5%	4.9%	4.9%
Hiking	29.3%	35.5%	52.2%	45.1%	52.4%	50.5%	45.9%
Backpacking/ camping	*	*	2.6%	3.0%	1.8%	2.2%	1.7%
Agritourism	9.5%	12.5%	12.1%	11.6%	11.5%	11.7%	11.1%
Sports event or tournament	3.2%	3.6%	2.8%	2.9%	2.5%	1.8%	2.8%
Parks/ botanical gardens	46.2%	43.4%	39.8%	39.7%	40.0%	41.4%	39.4%
Waterparks	NA	1.6%	1.7%	1.1%	1.7%	1.7%	1.4%
Mountain tubing/ waterfall rappel	NA	1.5%	1.8%	1.4%	1.5%	1.9%	1.9%
Zip-lining	NA	3.6%	3.2%	1.8%	3.2%	2.3%	2.1%
Skydiving	NA	0.4%	0.3%	0.3%	0.4%	0.1%	0.5%
All-terrain vehicle (ATV)	NA	2.3%	2.3%	2.0%	3.4%	2.5%	2.7%
Horseback riding	NA	1.9%	1.8%	1.5%	1.5%	0.9%	0.9%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	98.5%	98.5%	100.0%	87.0%	98.1%	94.4%
Lunch/ sunset/ dinner/ evening cruise	23.4%	18.9%	12.1%	44.4%	19.8%	20.6%
Live music/ stage show	33.4%	25.4%	47.6%	18.2%	24.2%	20.0%
Nightclub/ dancing/ bar/ karaoke	9.2%	4.4%	13.4%	0.0%	5.7%	2.6%
Fine dining	38.2%	42.0%	25.5%	9.6%	34.9%	34.2%
Family restaurant	64.3%	62.1%	36.8%	34.0%	57.7%	52.8%
Fast food	53.4%	35.7%	25.5%	8.6%	33.6%	28.2%
Food truck	52.6%	47.4%	40.3%	4.3%	29.1%	43.2%
Café/ coffee house	56.5%	54.9%	34.2%	9.6%	57.6%	53.7%
Ethnic dining	26.0%	16.8%	14.7%	9.6%	19.2%	17.8%
Farm-to-table cuisine	11.1%	14.6%	0.0%	5.2%	13.8%	12.9%
Prepared own meal	35.8%	66.4%	50.2%	5.2%	64.6%	63.7%

ACTIVITIES - ENTERTAINMENT & DINING - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	99.0%	98.6%	98.4%	98.9%	99.2%	98.5%	97.7%
Lunch/ sunset/ dinner/ evening cruise	27.4%	21.9%	21.2%	19.8%	21.0%	22.6%	21.9%
Live music/ stage show	33.0%	33.3%	30.7%	30.0%	28.8%	28.6%	28.2%
Nightclub/ dancing/ bar/ karaoke	8.3%	8.6%	7.2%	6.6%	6.1%	6.2%	6.3%
Fine dining	47.5%	48.1%	44.8%	46.2%	43.8%	40.2%	38.7%
Family restaurant	71.9%	63.4%	62.8%	64.2%	63.1%	63.1%	61.2%
Fast food	44.1%	47.1%	45.0%	45.4%	46.8%	43.4%	40.5%
Food truck	NA	35.2%	36.1%	32.4%	44.6%	43.2%	45.4%
Café/ coffee house	54.8%	52.4%	52.1%	52.4%	56.8%	55.6%	56.9%
Ethnic dining	26.5%	26.7%	25.6%	22.8%	23.4%	21.9%	21.3%
Farm-to-table cuisine	NA	NA	NA	NA	13.2%	14.0%	13.2%
Prepared own meal	69.3%	68.2%	66.8%	66.5%	61.0%	56.9%	56.9%

ACTIVITIES - SHOPPING - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.0%	96.9%	92.6%	60.8%	96.7%	94.0%
Malls/ department stores	71.7%	55.0%	0.0%	0.0%	40.3%	35.0%
Designer boutiques	18.9%	18.6%	0.0%	0.0%	12.2%	13.4%
Hotel/ resort stores	37.5%	29.1%	18.2%	4.3%	27.6%	16.3%
Swap meet/ flea market	16.7%	20.9%	7.4%	0.0%	11.7%	6.9%
Discount/ outlet stores	17.5%	15.2%	0.0%	0.0%	10.3%	11.4%
Supermarkets	52.1%	69.4%	47.6%	9.6%	67.5%	63.5%
Farmer's market	27.3%	39.7%	41.6%	8.6%	53.8%	48.7%
Convenience stores	64.1%	51.7%	13.4%	18.2%	45.1%	37.1%
Duty-free stores	13.5%	2.4%	0.0%	0.0%	4.9%	1.5%
Hawai'i-made products	44.4%	44.8%	35.5%	17.3%	42.9%	48.3%
Local shops and artisans	47.5%	58.2%	47.6%	33.0%	57.2%	62.9%
Local fashion designers	8.0%	9.6%	0.0%	5.2%	7.5%	10.8%

ACTIVITIES - SHOPPING - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.8%	97.4%	96.5%	97.5%	98.1%	98.0%	96.7%
Malls/ department stores	59.7%	59.1%	56.2%	54.8%	57.1%	55.8%	55.4%
Designer boutiques	25.4%	19.9%	18.4%	19.2%	20.8%	17.5%	16.9%
Hotel/ resort stores	27.5%	27.4%	28.8%	28.0%	31.8%	30.5%	30.2%
Swap meet/ flea market	23.0%	17.4%	16.7%	18.6%	13.7%	13.5%	15.5%
Discount/ outlet stores	25.6%	22.5%	22.6%	23.4%	19.8%	17.0%	14.9%
Supermarkets	66.0%	73.9%	72.3%	74.7%	68.7%	65.5%	63.5%
Farmer's market	42.4%	44.7%	43.1%	43.2%	42.8%	43.4%	41.6%
Convenience stores	50.0%	52.7%	51.9%	54.1%	55.8%	54.0%	52.5%
Duty-free stores	5.9%	7.4%	6.5%	4.8%	5.3%	5.3%	6.7%
Hawai'i-made products	NA	NA	NA	NA	47.2%	47.3%	45.4%
Local shops and artisans	71.7%	66.7%	64.7%	65.3%	61.1%	60.2%	56.3%
Local fashion designers	NA	NA	NA	NA	NA	NA	9.3%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	78.5%	62.5%	67.1%	52.2%	75.6%	65.9%
Historic military sites and museums	42.7%	3.6%	6.1%	0.0%	10.7%	4.3%
Historic Hawaiian sites and museums	32.5%	24.4%	26.8%	32.1%	45.4%	33.6%
Other historical sites, museums, and homes	13.8%	9.2%	28.1%	0.0%	17.1%	12.7%
Art museums	3.7%	1.4%	0.0%	0.0%	3.0%	1.0%
Art galleries and exhibitions	6.4%	10.5%	0.0%	4.3%	11.5%	9.7%
Lū'au/ Polynesian show/ hula show	34.5%	23.8%	6.1%	0.0%	22.5%	21.1%
Lesson- e.g. ukulele, hula, canoe, lei making	6.8%	5.3%	0.0%	4.3%	4.3%	3.2%
Play/ concert/ theatre	4.4%	2.6%	0.0%	0.0%	2.2%	2.0%
Art/ craft fair	6.8%	13.8%	7.4%	4.3%	13.0%	15.3%
Festival/ events	6.9%	4.4%	7.4%	15.7%	4.6%	5.2%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	74.7%	72.9%	69.7%	68.0%	70.2%	72.5%	72.1%
Historic military sites and museums	23.6%	16.8%	16.7%	16.3%	17.7%	20.3%	19.2%
Historic Hawaiian sites and museums	NA	NA	NA	NA	31.6%	34.3%	33.9%
Other historical sites, museums, and homes	33.1%	29.4%	26.5%	29.1%	12.9%	13.0%	13.7%
Art museums	*	*	*	*	3.4%	3.2%	2.6%
Art galleries and exhibitions	*	*	*	*	11.5%	10.4%	9.4%
Lū'au/ Polynesian show/ hula show	36.5%	34.4%	32.9%	28.4%	27.6%	29.0%	27.7%
Lesson- e.g. ukulele, hula, canoe, lei making	5.1%	8.2%	7.4%	7.0%	3.7%	5.2%	5.6%
Play/ concert/ theatre	6.1%	5.5%	4.4%	4.6%	2.7%	3.3%	3.2%
Art/ craft fair	14.2%	14.5%	13.7%	14.0%	10.7%	11.0%	12.1%
Festival/ events	10.4%	6.0%	5.0%	4.8%	3.6%	5.9%	5.9%

* Combined Museum/ Art galleries as single option

ACTIVITIES – TRANSPORTATION – CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'	KAUA'I
TOTAL	94.6%	96.2%	79.2%	67.0%	93.4%	95.1%
Airport shuttle	16.1%	11.0%	0.0%	4.3%	17.3%	11.0%
Trolley	6.5%	0.0%	0.0%	0.0%	2.7%	1.9%
Public bus	19.6%	3.0%	6.1%	0.0%	4.3%	2.9%
Tour bus/ tour van	17.3%	5.6%	24.2%	24.4%	6.8%	10.9%
Taxi/ limo	18.8%	7.1%	0.0%	14.8%	7.6%	5.4%
Rental car	53.1%	81.4%	47.6%	27.8%	80.3%	77.2%
Ride share	40.7%	13.3%	0.0%	9.6%	11.1%	5.7%
Car share	7.2%	3.4%	13.4%	4.3%	3.5%	4.3%
Bicycle rental	1.5%	1.6%	0.0%	0.0%	2.4%	3.9%

ACTIVITIES – TRANSPORTATION – CANADA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.8%	96.0%	95.3%	96.8%	95.7%	95.5%	94.7%
Airport shuttle	23.8%	22.2%	18.6%	19.6%	15.8%	15.4%	14.6%
Trolley	4.7%	4.5%	5.5%	6.6%	4.4%	4.8%	3.3%
Public bus	12.6%	11.1%	10.4%	12.0%	8.8%	11.0%	9.3%
Tour bus/ tour van	11.5%	12.4%	10.9%	11.6%	10.0%	11.4%	11.3%
Taxi/ limo	17.5%	15.3%	13.0%	14.6%	14.9%	13.6%	11.5%
Rental car	82.8%	81.1%	79.9%	79.8%	74.7%	71.8%	71.3%
Ride share	NA	9.1%	13.7%	12.5%	19.1%	19.9%	21.2%
Car share	NA	NA	NA	NA	5.8%	5.1%	5.0%
Bicycle rental	NA	3.4%	3.2%	3.7%	3.6%	2.7%	2.3%

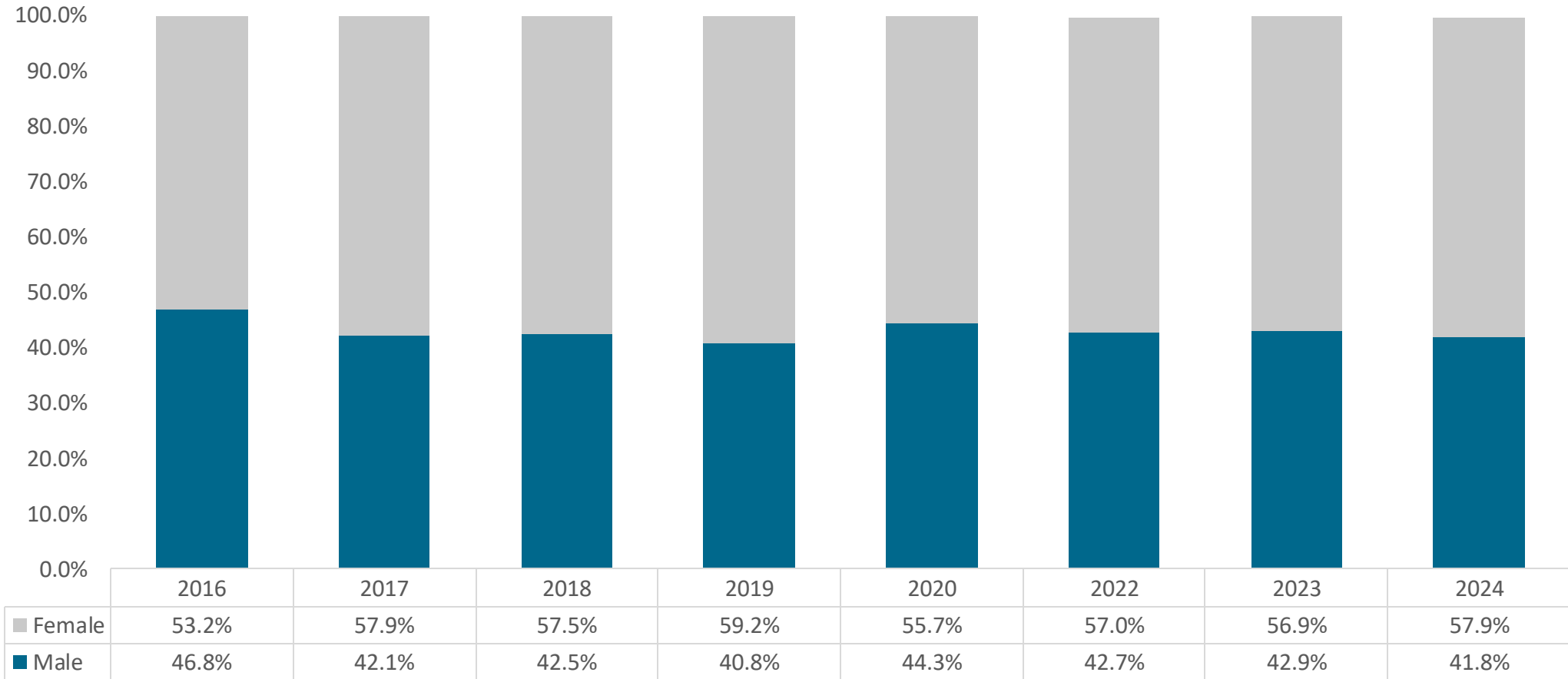
ACTIVITIES - OTHER - CANADA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	21.9%	22.5%	22.1%	9.6%	24.3%	15.1%
Visiting friends/ relatives	20.6%	20.0%	14.7%	9.6%	22.3%	13.1%
Giving back to the local community	2.0%	3.1%	7.4%	0.0%	2.6%	2.7%

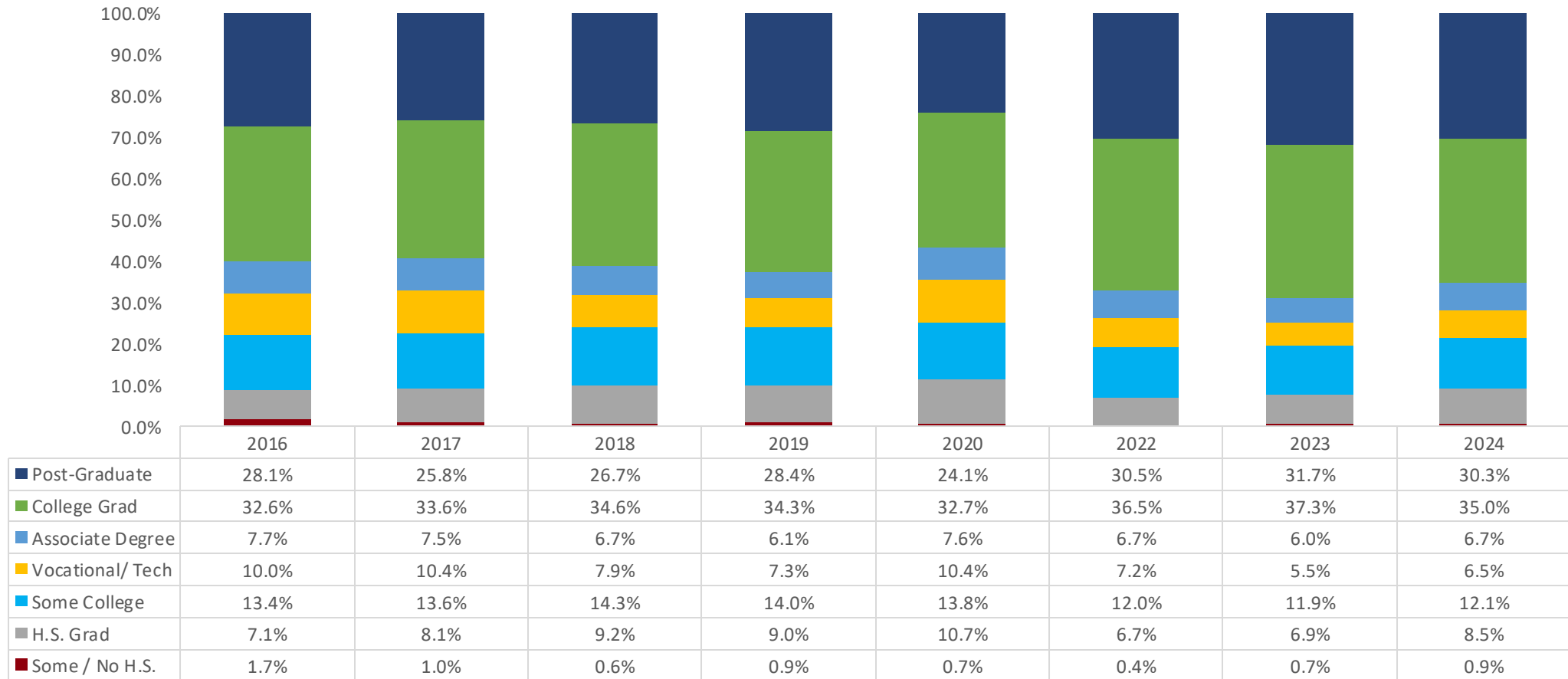
ACTIVITIES - OTHER - CANADA

	2018	2019	2020	2022	2023	2024
TOTAL	20.1%	18.6%	23.5%	23.5%	23.2%	22.3%
Visiting friends/ relatives	19.0%	17.9%	22.6%	21.1%	20.0%	20.3%
Giving back to the local community	1.3%	0.9%	1.3%	3.4%	4.1%	2.7%

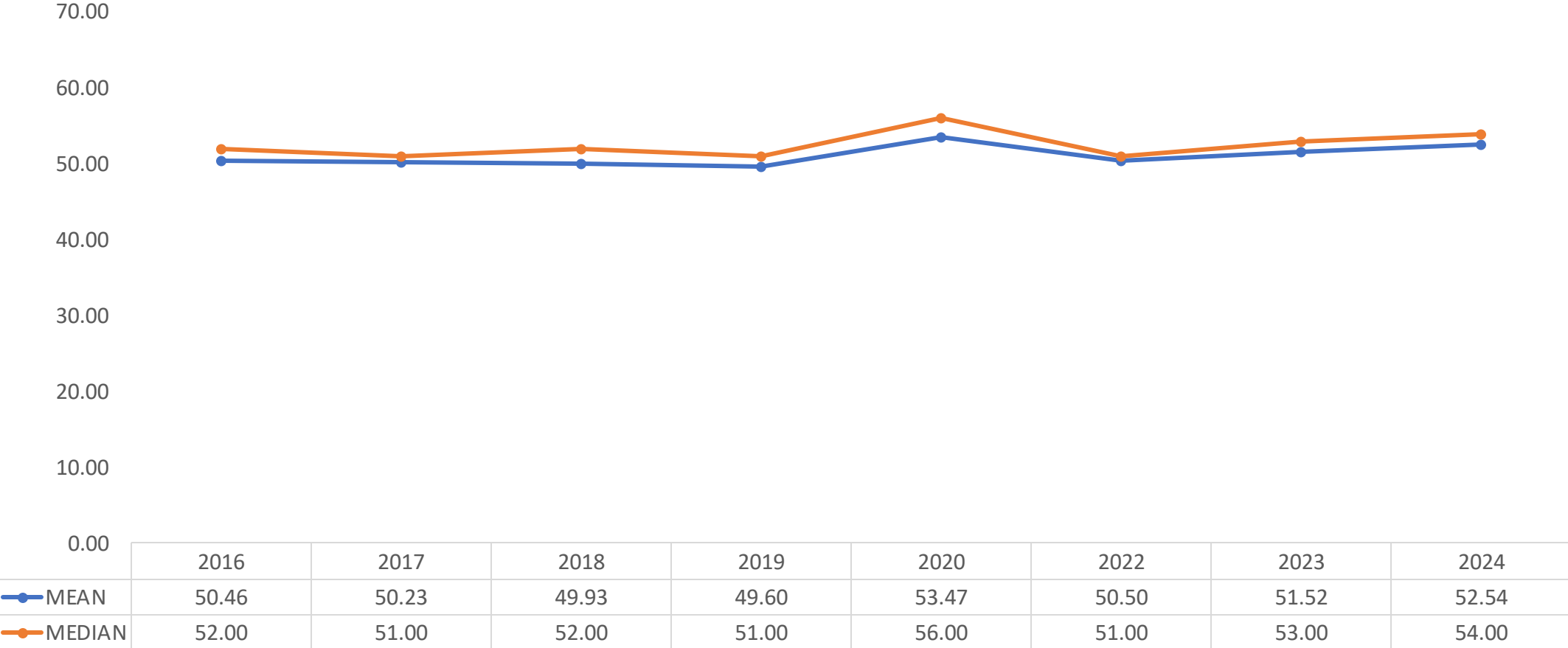
VISITOR PROFILE - GENDER - CANADA



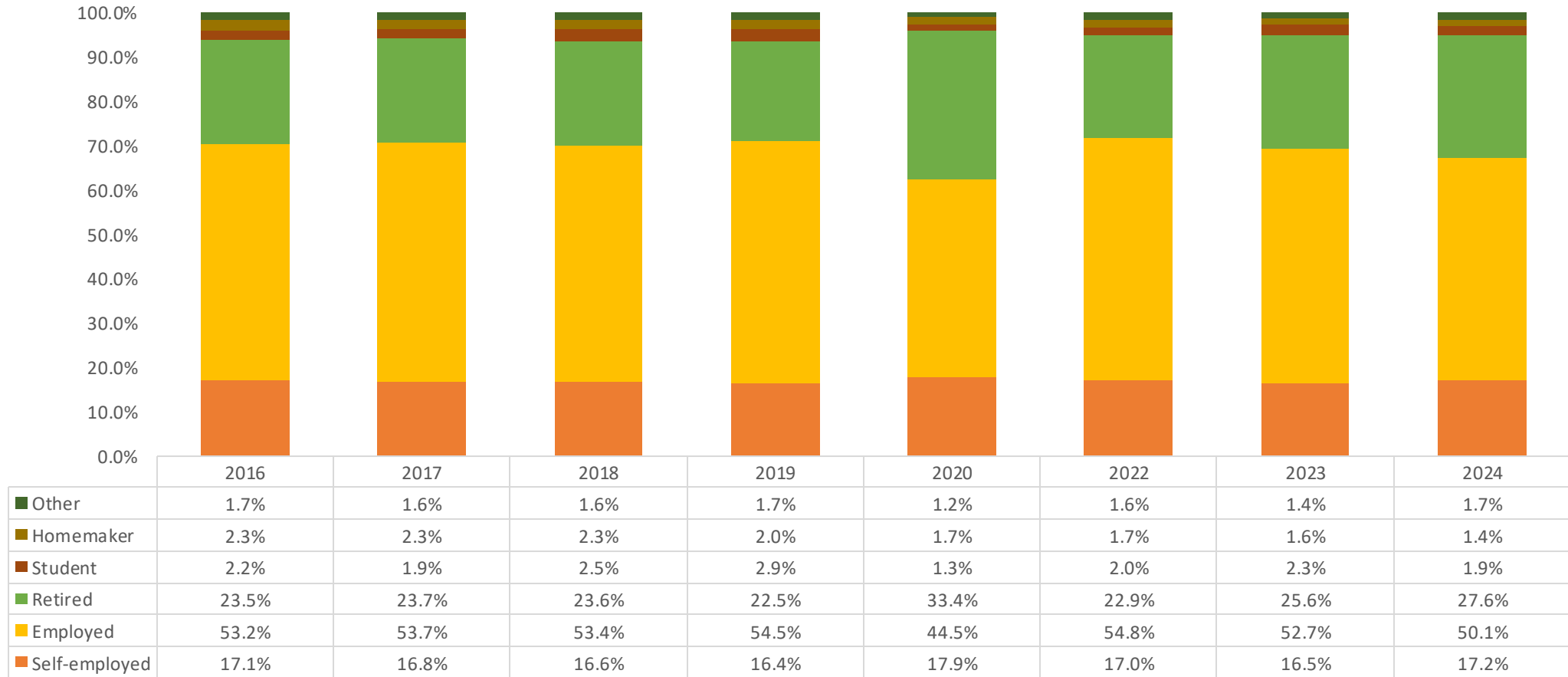
VISITOR PROFILE - EDUCATION - CANADA



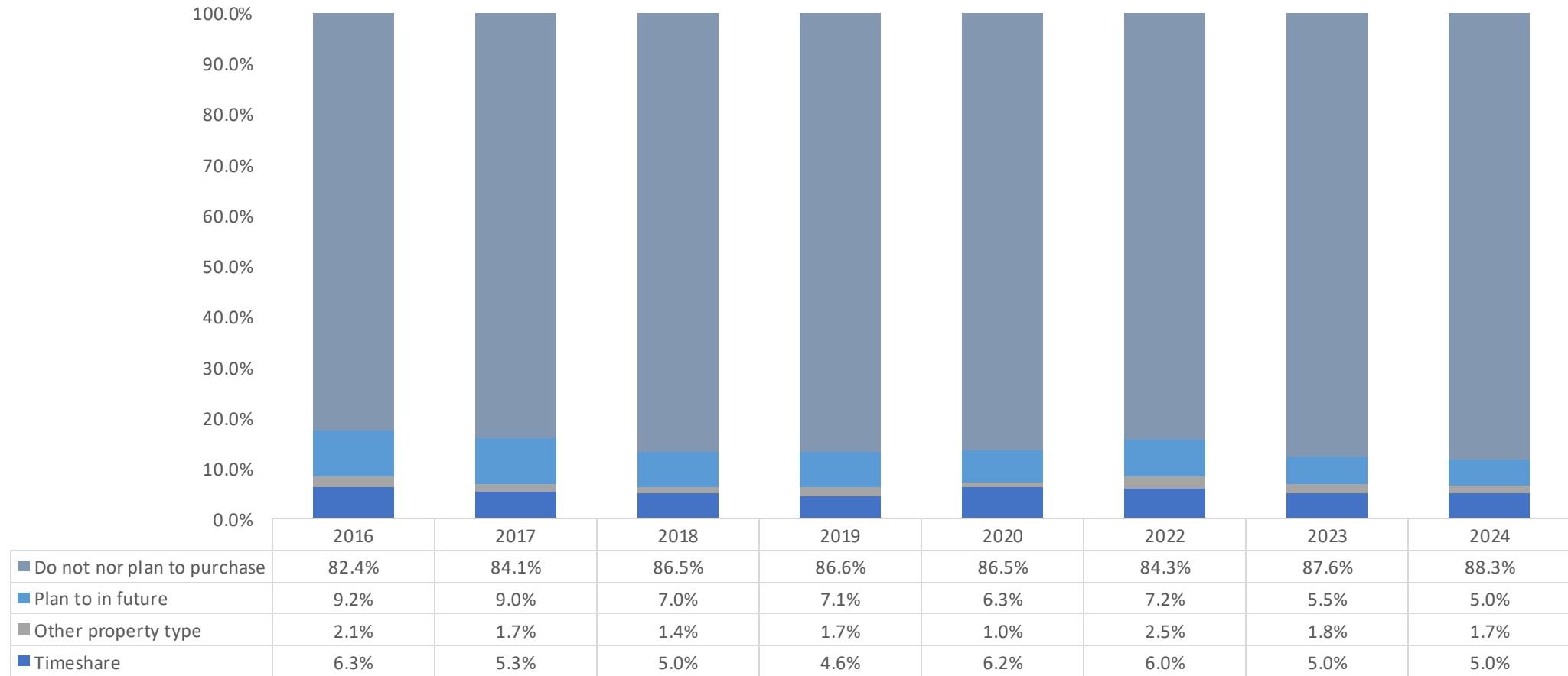
VISITOR PROFILE - AGE - CANADA



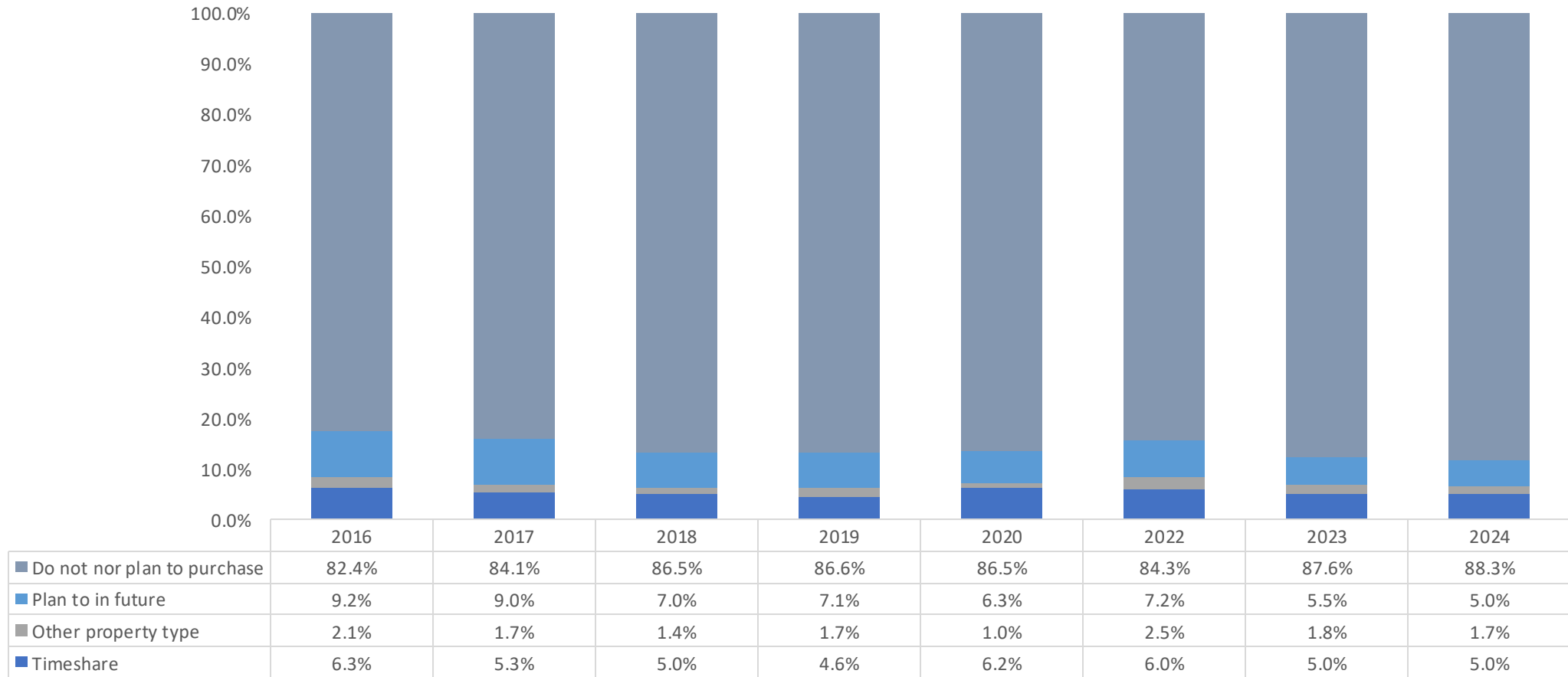
VISITOR PROFILE - EMPLOYMENT STATUS - CANADA



VISITOR PROFILE - HAWAI'I PROPERTY OWNER - CANADA



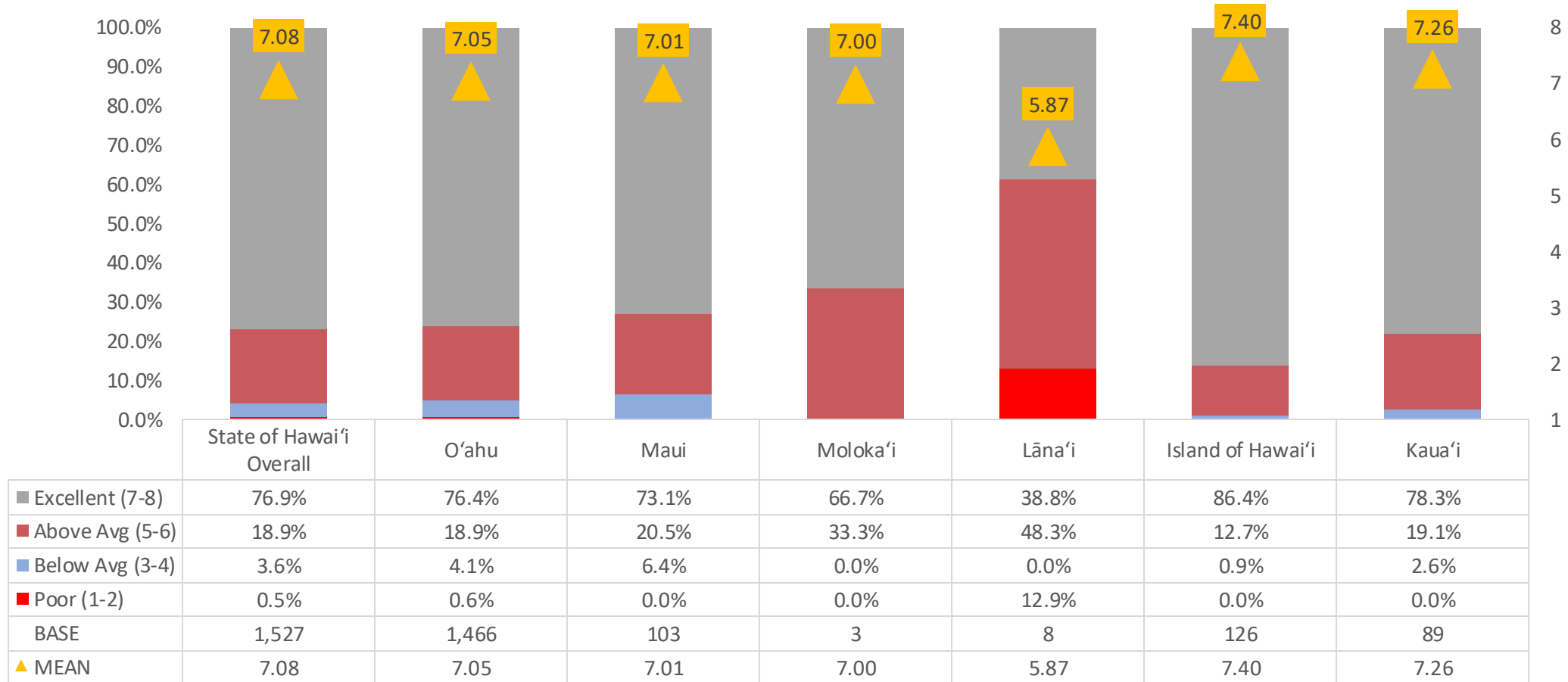
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - CANADA



Section 17 – Oceania

OVERALL SATISFACTION - MOST RECENT TRIP - OCEANIA

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



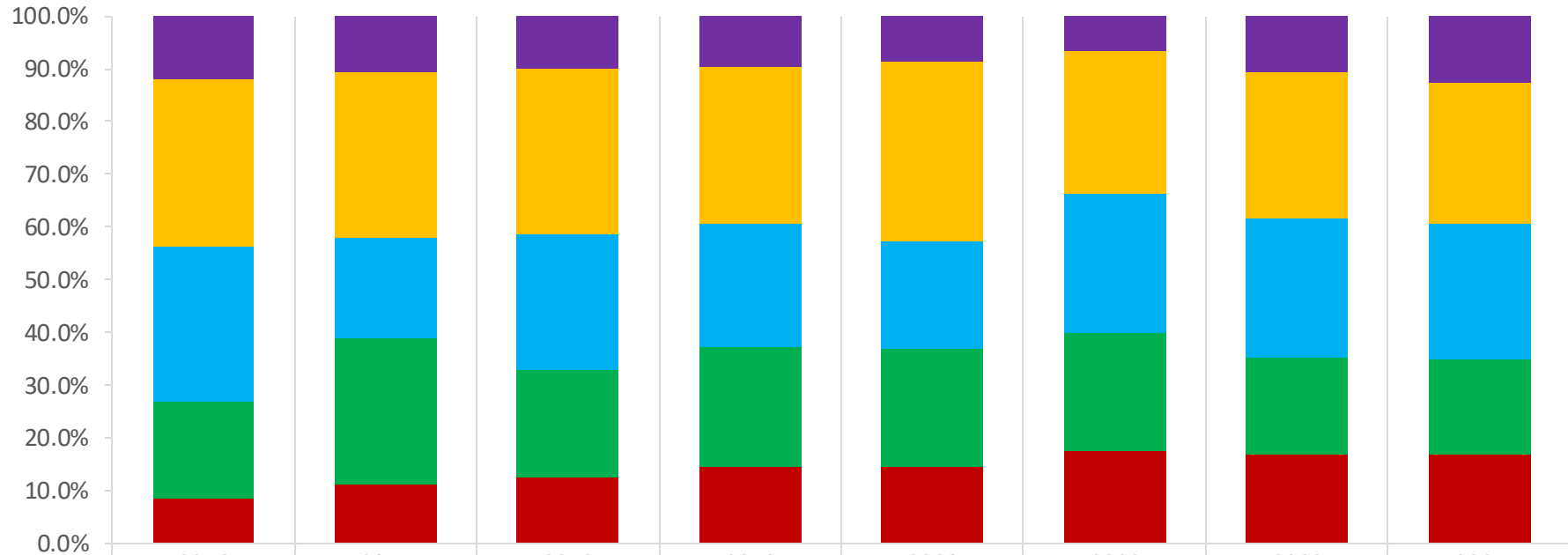
PRIMARY PURPOSE OF TRIP - OCEANIA

	2018	2019	2020	2022	2023	2024
Vacation	73.8%	71.8%	82.6%	77.7%	81.7%	81.2%
Layover/ break up long flight	9.9%	11.9%	3.9%	8.5%	7.3%	6.5%
Visiting friends/ relatives	2.2%	2.0%	2.1%	5.5%	3.8%	4.2%
Honeymoon	2.4%	1.9%	1.6%	1.7%	1.6%	1.5%
Anniversary/ birthday	5.7%	5.1%	5.0%	1.7%	1.1%	1.1%

PRIMARY + SECONDARY PURPOSE OF TRIP - OCEANIA

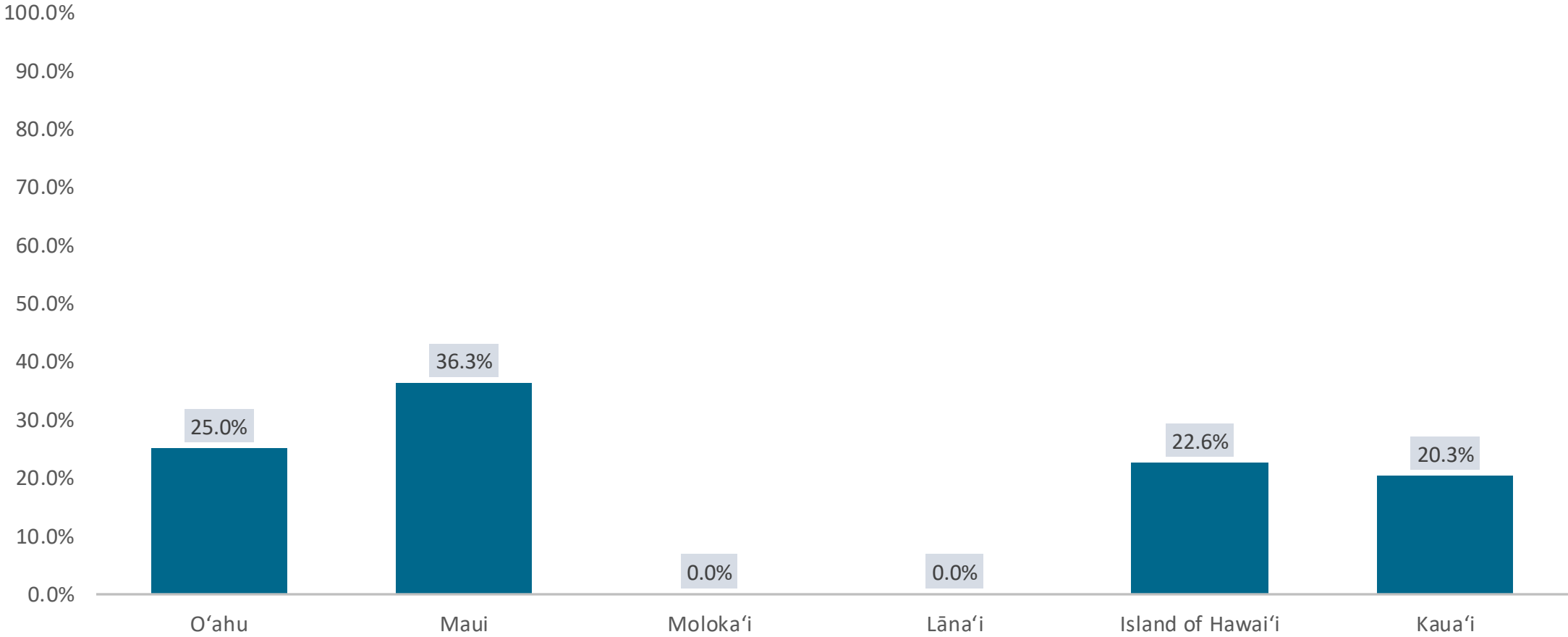
	2018	2019	2020	2022	2023	2024
Vacation	89.8%	88.9%	91.6%	88.5%	91.2%	90.9%
Layover/ break up long trip	20.5%	22.6%	7.9%	14.6%	14.3%	14.5%
Visit friends/ relatives	4.2%	4.1%	6.0%	10.6%	8.8%	8.4%
Anniversary/ birthday	12.1%	9.3%	7.1%	2.7%	2.3%	1.8%
Honeymoon	2.9%	2.2%	2.0%	2.4%	1.9%	1.8%
Other business trip/ work in Hawai'i	0.0%	0.0%	2.0%	2.4%	1.3%	1.3%

VACATION TRIP DESCRIPTION - OCEANIA

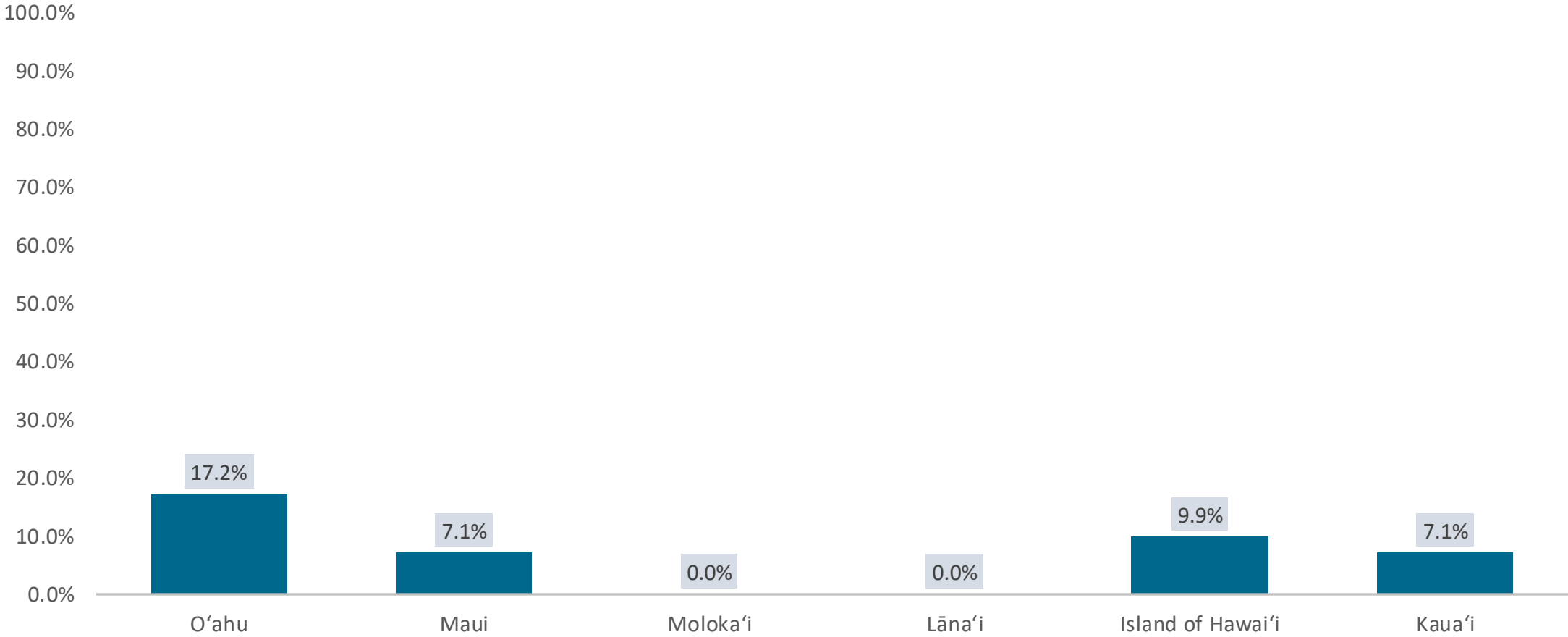


	2016	2017	2018	2019	2020	2022	2023	2024
Once-in-a-lifetime	11.9%	10.9%	10.1%	9.8%	8.8%	6.6%	10.5%	12.6%
Special occasion	31.8%	31.2%	31.4%	29.5%	33.8%	26.9%	27.9%	26.8%
More special than most trips	29.4%	19.2%	25.7%	23.6%	20.7%	26.5%	26.4%	25.9%
Annual/ Semi-annual trip	18.3%	27.7%	20.5%	22.6%	22.1%	22.6%	18.3%	17.8%
Other	8.6%	11.1%	12.3%	14.5%	14.6%	17.3%	16.9%	16.9%

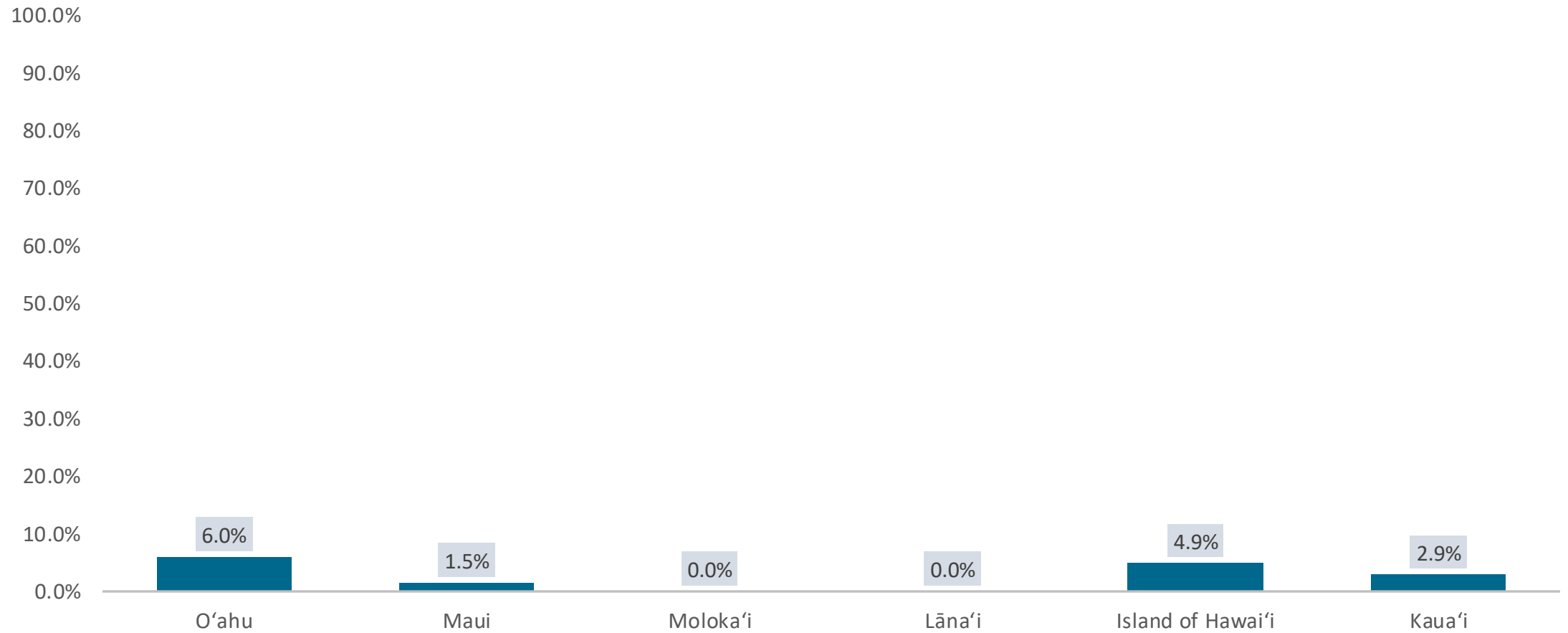
ADVERTISING AWARENESS - OCEANIA



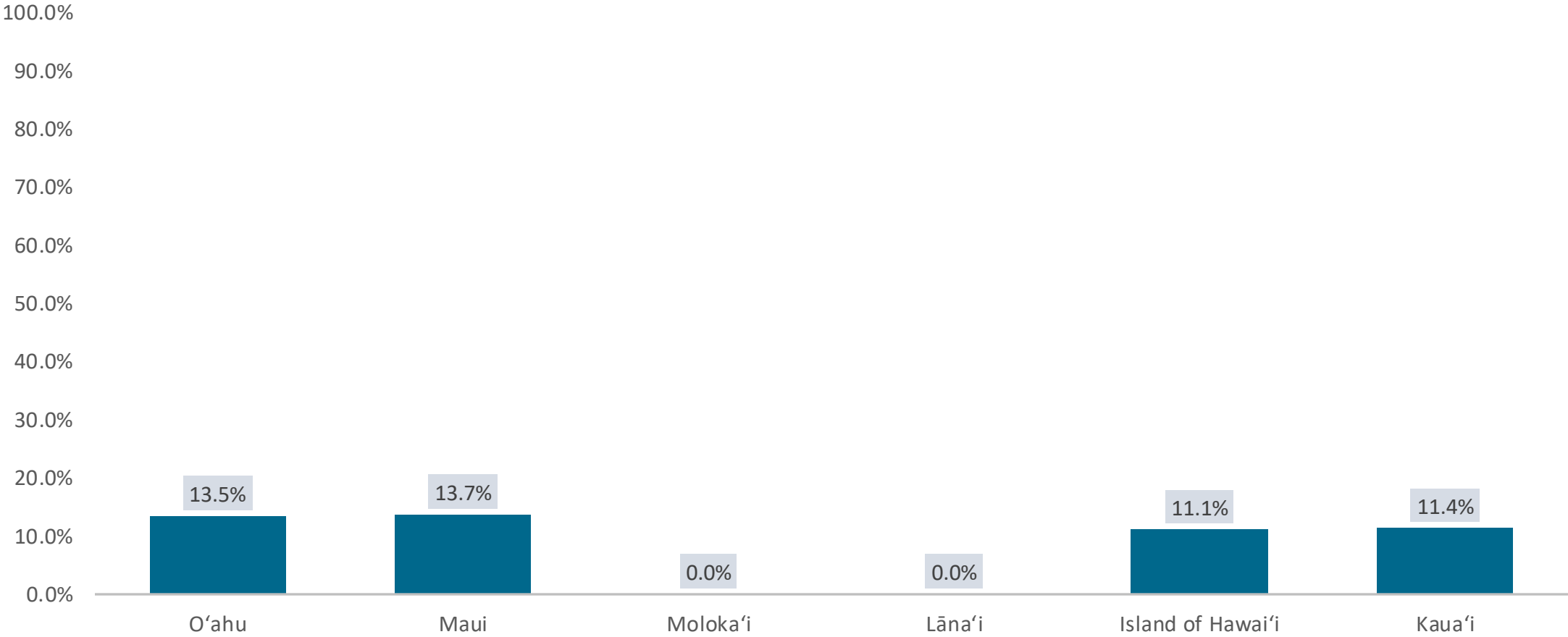
IMPACT OF LOCATION FILMING - OCEANIA



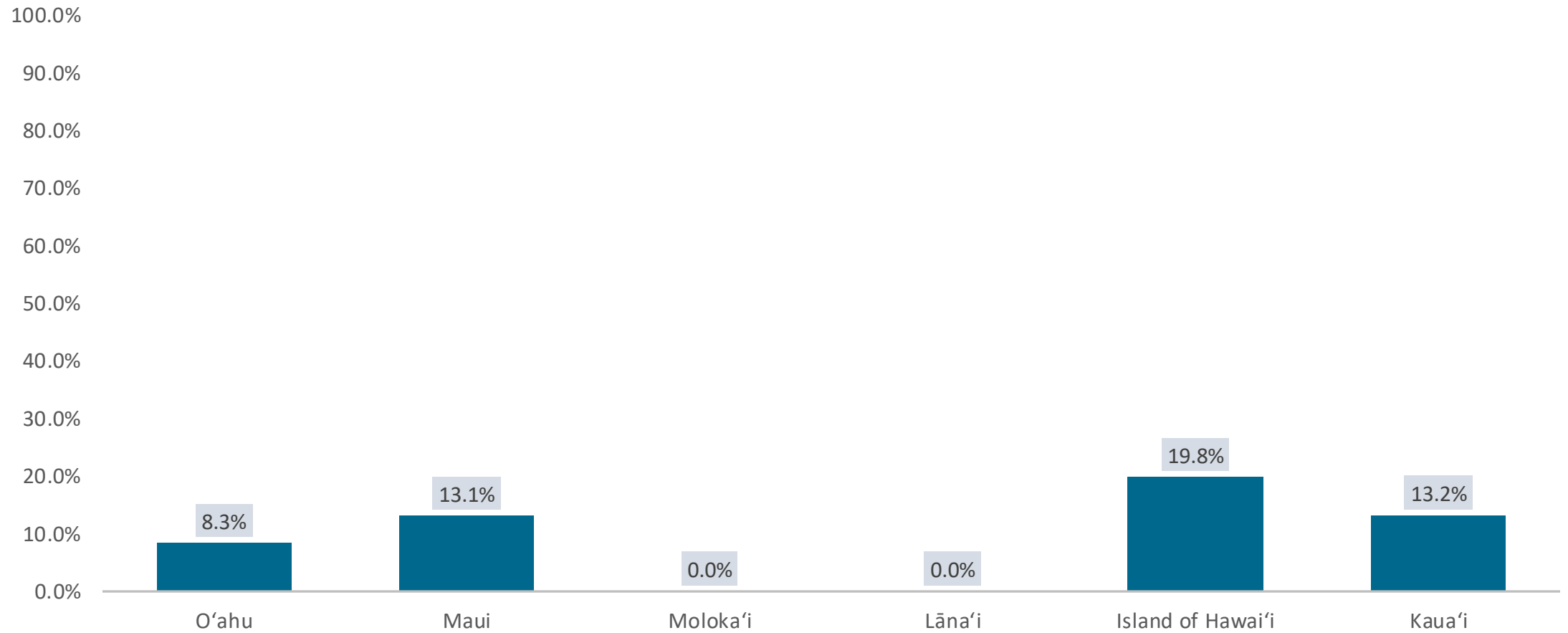
IMPACT OF HAWAIIAN MUSIC - OCEANIA



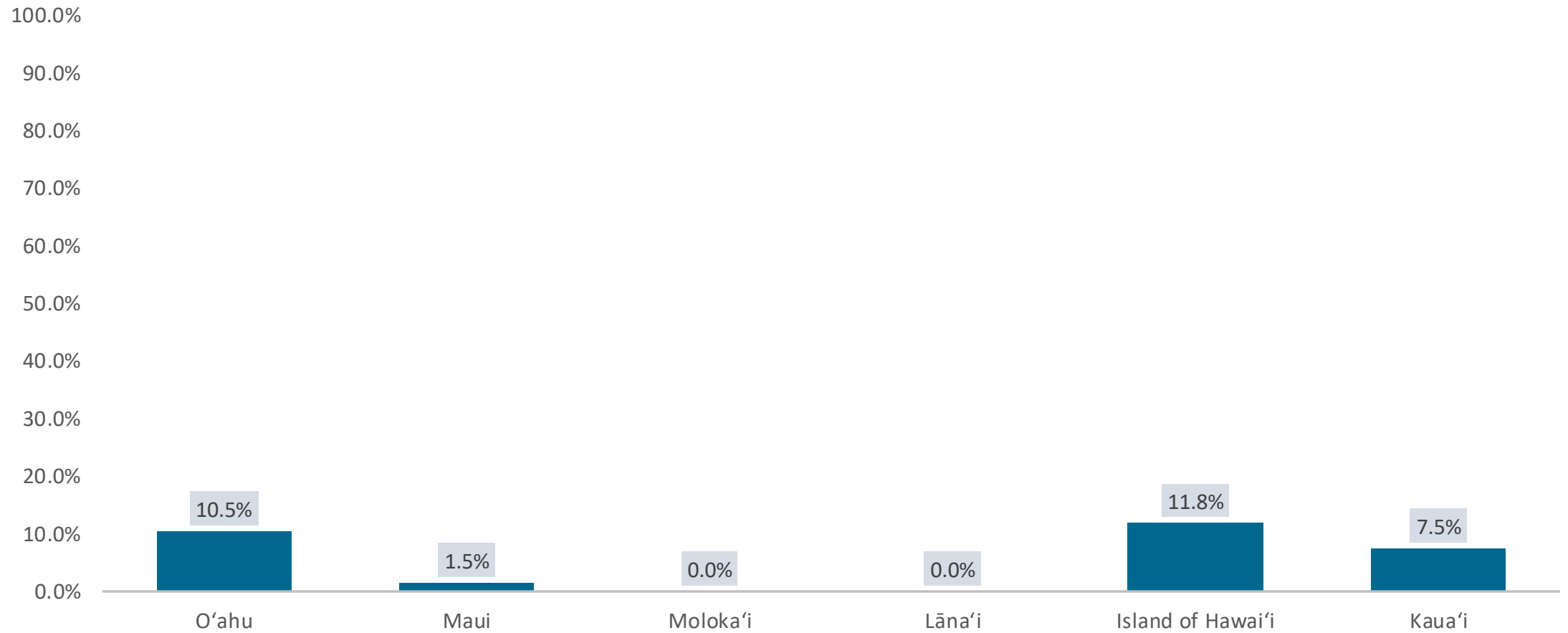
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - OCEANIA



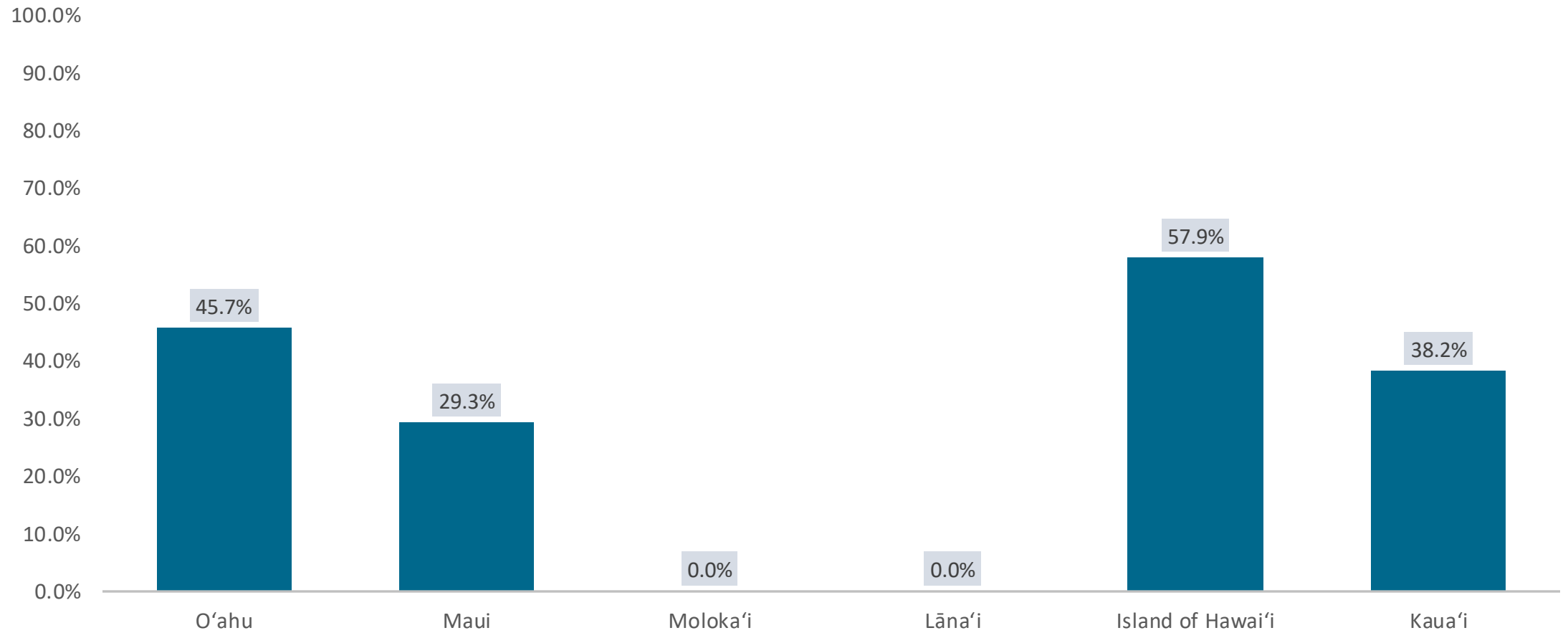
IMPACT OF OUTDOOR/ SPORTING EVENTS - OCEANIA



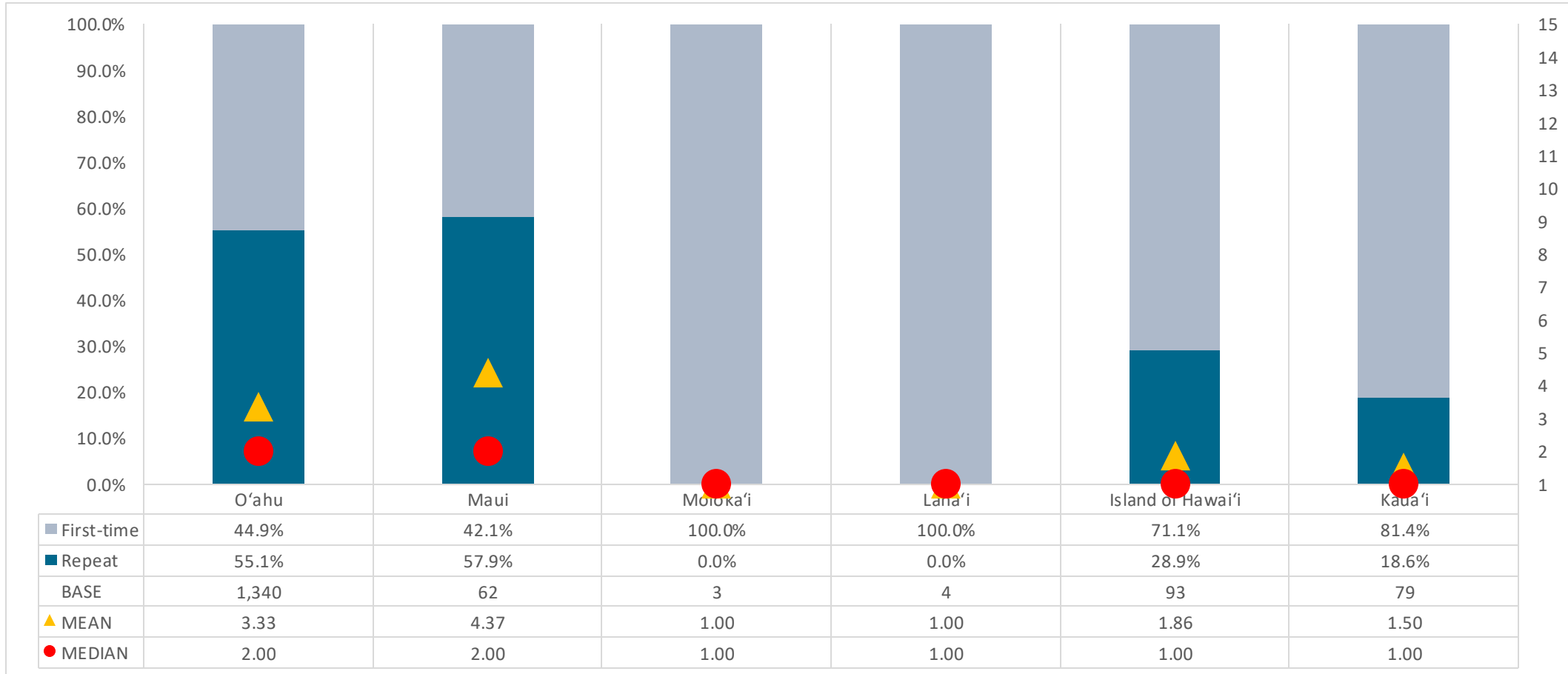
IMPACT OF HAWAIIAN CULTURAL EVENTS - OCEANIA



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - OCEANIA



1ST TIME VS REPEAT VISITORS - OCEANIA

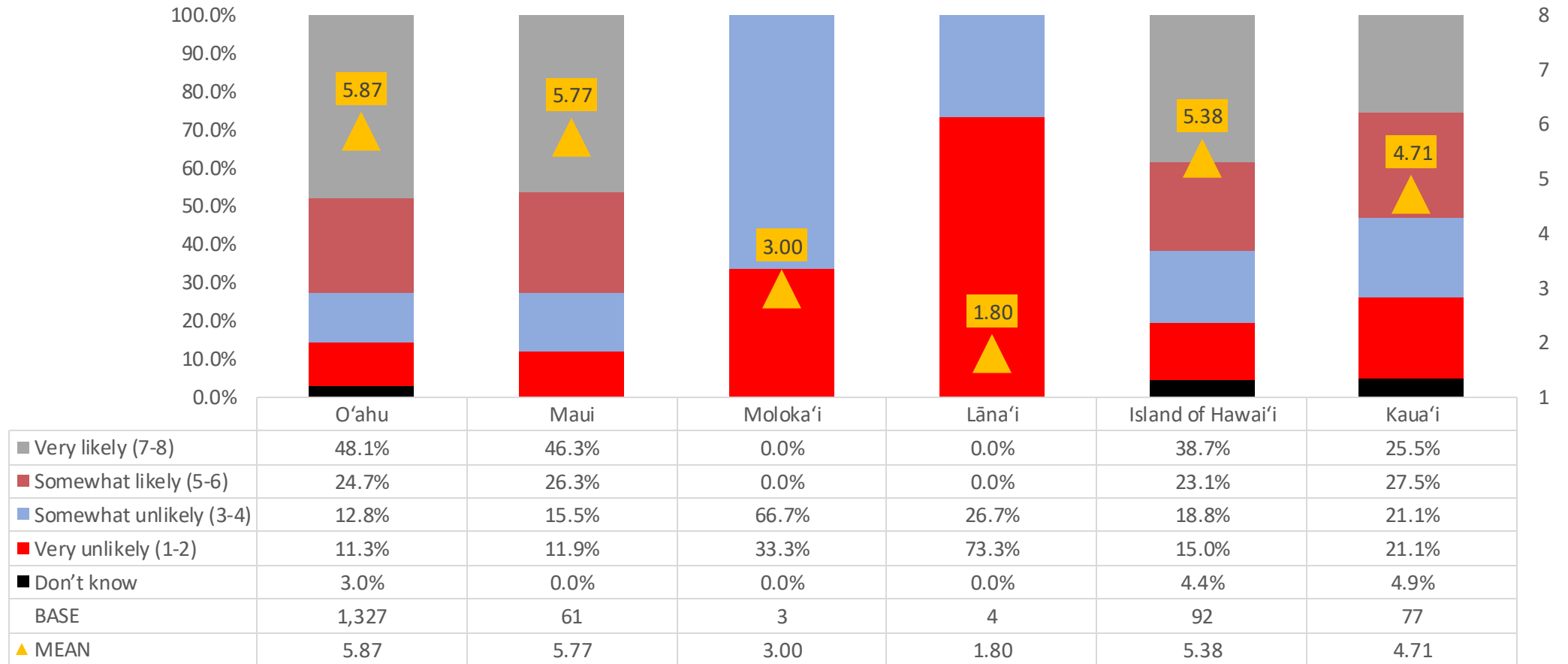


TRAVEL PARTY MEMBERS - OCEANIA

	2016	2017	2018	2019	2020	2022	2023	2024
My spouse	67.5%	67.7%	66.8%	62.8%	56.2%	55.4%	60.0%	61.9%
My child(ren)/ grandchild(ren) under 18	22.4%	25.2%	23.1%	21.3%	27.7%	17.4%	25.3%	22.9%
Other adult members of my family	21.5%	22.2%	22.3%	23.9%	30.0%	21.7%	21.3%	23.3%
Myself only (traveled alone/ no one else)	7.0%	7.2%	7.1%	7.7%	9.9%	15.7%	13.9%	12.6%
My friends/ associates	16.0%	15.9%	15.7%	16.4%	11.8%	12.6%	12.3%	11.3%
My girlfriend/ boyfriend	4.7%	4.5%	4.1%	4.9%	5.6%	4.8%	3.3%	3.3%
Same-gender partner	1.1%	1.0%	1.1%	1.1%	0.9%	1.1%	0.4%	0.4%

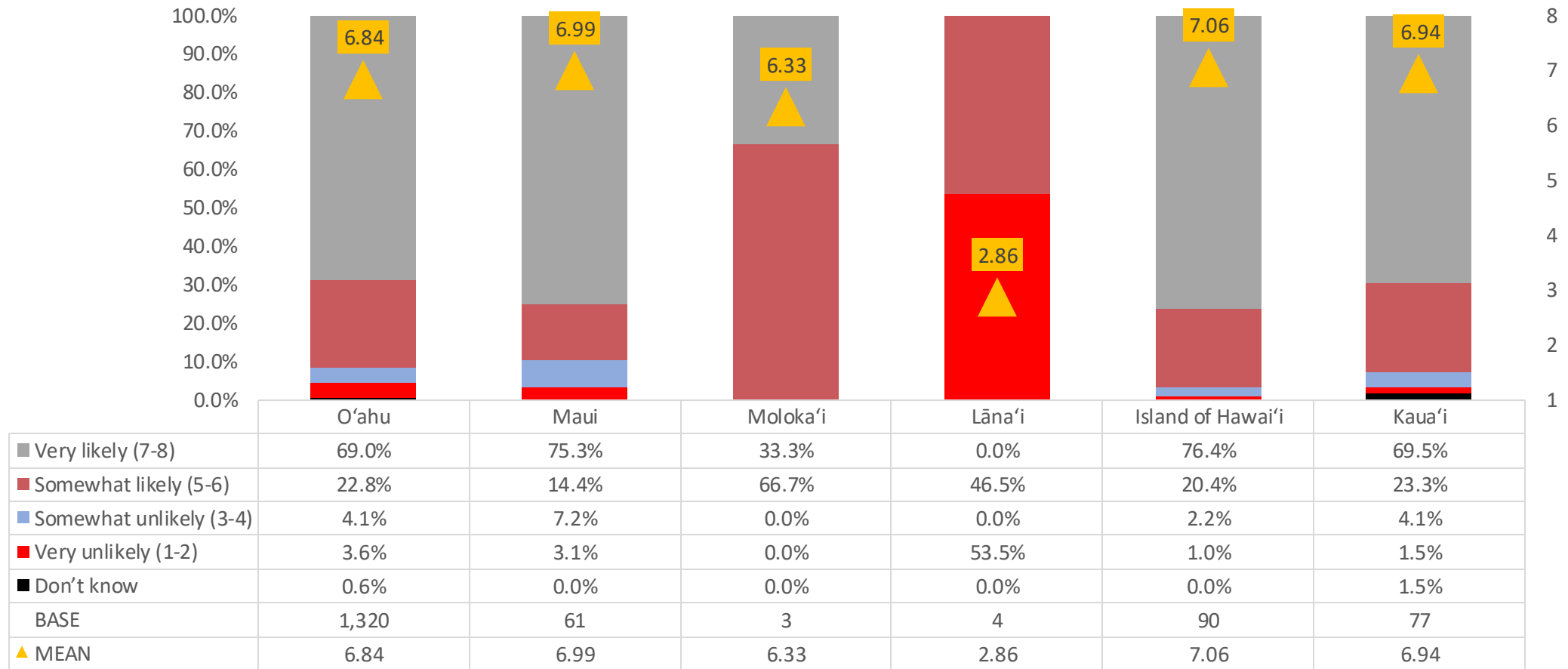
LIKELIHOOD OF RETURN VISIT - OCEANIA

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



BRAND/ DESTINATION ADVOCACY – OCEANIA

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



ACTIVITIES - SIGHTSEEING - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	91.7%	95.2%	100.0%	100.0%	97.4%	97.3%
On own (self-guided)/ driving around the island	45.0%	66.9%	0.0%	26.7%	64.7%	63.3%
Helicopter ride/ airplane tour	1.7%	10.2%	0.0%	0.0%	12.0%	12.2%
Boat tour/ submarine ride/ whale watching	16.6%	15.5%	0.0%	0.0%	26.9%	18.0%
Visiting towns/ communities	26.0%	32.6%	0.0%	19.8%	40.2%	42.0%
Private limousine/ van tour/ tour bus	31.8%	13.9%	50.0%	53.5%	23.7%	14.5%
Scenic views/ natural landmarks	49.6%	39.6%	50.0%	0.0%	64.1%	64.9%
Movie and TV filming location tours	9.5%	0.0%	0.0%	0.0%	3.6%	2.7%

ACTIVITIES – SIGHTSEEING – OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	92.9%	92.3%	92.0%	91.0%	91.2%	91.2%	92.8%
On own (self-guided)/ driving around the island	46.8%	48.7%	48.2%	54.9%	55.2%	48.8%	48.2%
Helicopter ride/ airplane tour	7.2%	8.2%	7.1%	1.5%	3.5%	2.7%	3.4%
Boat tour/ submarine ride/ whale watching	20.0%	18.7%	16.4%	19.3%	18.1%	15.8%	18.1%
Visiting towns/ communities	20.2%	31.4%	29.4%	31.0%	32.3%	26.7%	28.1%
Private limousine/ van tour/ tour bus	35.9%	35.9%	32.4%	27.6%	22.5%	25.1%	30.7%
Scenic views/ natural landmarks	62.9%	51.7%	50.3%	47.3%	48.9%	47.1%	50.9%
Movie and TV filming location tours	8.4%	9.6%	10.2%	9.5%	7.6%	7.9%	8.8%

ACTIVITIES - RECREATION - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	92.3%	86.6%	100.0%	46.5%	90.9%	85.1%
Beach/ sunbathing	77.0%	66.8%	0.0%	0.0%	57.0%	59.6%
Bodyboarding	3.5%	2.2%	0.0%	0.0%	2.6%	2.3%
Stand-up paddle boarding	3.0%	1.6%	0.0%	0.0%	1.0%	0.0%
Surfing	7.6%	6.4%	0.0%	0.0%	3.6%	4.9%
Canoe paddling	0.6%	0.0%	0.0%	0.0%	3.2%	1.1%
Kayaking	1.0%	2.2%	0.0%	0.0%	2.6%	2.7%
Swimming in the ocean	60.2%	59.8%	0.0%	19.8%	52.4%	45.1%
Snorkeling	21.1%	24.6%	0.0%	0.0%	35.9%	32.1%
Freediving	0.9%	1.6%	0.0%	0.0%	1.3%	0.0%
Windsurfing/ kitesurfing	0.1%	3.2%	0.0%	0.0%	0.0%	0.0%
Jet skiing/ parasailing	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Scuba diving	0.6%	0.0%	0.0%	0.0%	1.3%	0.0%
Fishing	0.8%	1.6%	0.0%	0.0%	1.0%	0.0%
Golf	1.8%	6.4%	0.0%	0.0%	4.5%	4.9%

ACTIVITIES - RECREATION - OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	92.2%	94.1%	93.4%	94.3%	94.3%	93.5%	92.3%
Beach/ sunbathing	78.7%	78.4%	75.8%	74.3%	79.5%	78.3%	76.0%
Bodyboarding	12.1%	9.6%	8.1%	3.9%	4.5%	3.7%	3.5%
Stand-up paddle boarding	*	*	*	6.1%	5.8%	5.5%	2.8%
Surfing	9.3%	9.4%	7.5%	7.7%	8.8%	8.3%	7.6%
Canoe paddling	4.2%	4.0%	3.5%	2.2%	2.3%	2.1%	0.8%
Kayaking	**	**	**	**	**	**	1.3%
Swimming in the ocean	NA	64.1%	64.2%	62.4%	64.2%	62.9%	60.4%
Snorkeling	NA	27.7%	27.2%	28.2%	24.4%	22.2%	23.3%
Freediving	NA	NA	NA	0.0%	0.8%	0.4%	0.8%
Windsurfing/ kitesurfing	0.3%	0.2%	0.0%	0.4%	0.3%	0.0%	0.2%
Jet skiing/ parasailing	1.4%	1.4%	1.3%	1.7%	0.8%	1.2%	0.6%
Scuba diving	1.5%	1.1%	0.6%	0.0%	1.2%	0.8%	0.6%
Fishing	1.1%	1.1%	0.7%	2.3%	0.7%	0.9%	0.9%
Golf	3.2%	3.1%	2.8%	1.9%	2.5%	2.5%	2.3%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	92.3%	86.6%	100.0%	46.5%	90.9%	85.1%
Running/ jogging/ fitness walking	24.1%	26.7%	0.0%	26.7%	27.5%	16.4%
Cycling	1.5%	3.2%	0.0%	0.0%	0.0%	1.1%
Spa	5.3%	10.7%	0.0%	0.0%	8.1%	2.7%
Hiking	17.2%	12.3%	50.0%	0.0%	31.0%	20.6%
Backpacking/ camping	0.1%	0.0%	0.0%	0.0%	0.0%	4.2%
Agritourism	5.6%	2.2%	0.0%	0.0%	9.4%	5.3%
Sports event or tournament	1.3%	1.6%	0.0%	0.0%	5.8%	0.0%
Parks/ botanical gardens	26.5%	17.7%	50.0%	0.0%	43.1%	34.8%
Waterparks	1.0%	2.2%	0.0%	0.0%	1.9%	1.1%
Mountain tubing/ waterfall rappel	0.2%	0.0%	0.0%	0.0%	0.0%	6.8%
Zip-lining	0.9%	2.2%	0.0%	0.0%	0.0%	2.7%
Skydiving	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	3.3%	0.0%	0.0%	0.0%	0.0%	2.3%
Horseback riding	0.5%	0.0%	0.0%	0.0%	0.0%	2.7%

ACTIVITIES – RECREATION – OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	92.2%	94.1%	93.4%	94.3%	94.3%	93.5%	92.3%
Running/ jogging/ fitness walking	28.2%	22.8%	20.1%	26.0%	24.1%	25.6%	24.4%
Cycling	NA	NA	NA	NA	2.7%	1.3%	1.5%
Spa	7.4%	7.7%	6.1%	5.7%	6.4%	6.1%	5.8%
Hiking	9.1%	10.8%	22.9%	21.7%	23.5%	21.6%	18.5%
Backpacking/ camping	*	*	0.6%	1.0%	0.5%	0.6%	0.3%
Agritourism	5.1%	8.1%	8.6%	9.6%	6.8%	6.6%	5.8%
Sports event or tournament	1.9%	2.0%	2.5%	2.0%	1.2%	1.2%	1.6%
Parks/ botanical gardens	29.7%	32.9%	30.4%	27.1%	29.3%	28.6%	27.8%
Waterparks	NA	2.0%	1.4%	0.9%	1.3%	0.9%	1.1%
Mountain tubing/ waterfall rappel	NA	0.9%	1.2%	0.9%	0.8%	0.6%	0.5%
Zip-lining	NA	2.4%	3.1%	2.4%	2.2%	1.7%	1.1%
Skydiving	NA	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%
All-terrain vehicle (ATV)	NA	3.3%	4.1%	3.8%	3.3%	2.7%	3.1%
Horseback riding	NA	1.6%	1.0%	0.7%	0.5%	0.4%	0.6%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.3%	96.8%	100.0%	46.5%	94.2%	84.3%
Lunch/ sunset/ dinner/ evening cruise	16.6%	18.2%	0.0%	0.0%	16.9%	11.0%
Live music/ stage show	22.2%	8.6%	0.0%	0.0%	19.1%	6.9%
Nightclub/ dancing/ bar/ karaoke	5.8%	8.0%	0.0%	0.0%	4.2%	1.5%
Fine dining	29.6%	44.3%	0.0%	0.0%	21.0%	16.4%
Family restaurant	67.3%	45.4%	0.0%	0.0%	54.1%	29.7%
Fast food	54.4%	23.5%	0.0%	19.8%	35.3%	16.4%
Food truck	34.0%	26.7%	0.0%	0.0%	33.7%	28.6%
Café/ coffee house	61.4%	59.4%	50.0%	46.5%	59.3%	40.4%
Ethnic dining	13.9%	7.0%	0.0%	0.0%	11.6%	1.5%
Farm-to-table cuisine	3.0%	7.5%	0.0%	0.0%	6.8%	3.1%
Prepared own meal	21.3%	38.5%	50.0%	0.0%	38.5%	45.5%

ACTIVITIES - ENTERTAINMENT & DINING - OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.6%	98.2%	97.9%	98.4%	98.8%	99.1%	97.6%
Lunch/ sunset/ dinner/ evening cruise	24.2%	21.0%	18.6%	17.0%	18.8%	17.3%	16.9%
Live music/ stage show	23.9%	25.3%	23.2%	20.1%	20.4%	20.9%	21.6%
Nightclub/ dancing/ bar/ karaoke	9.0%	9.4%	8.0%	6.4%	9.1%	6.4%	5.9%
Fine dining	39.0%	38.3%	34.7%	35.1%	33.6%	29.1%	29.9%
Family restaurant	75.3%	67.7%	66.3%	69.6%	64.8%	68.0%	65.2%
Fast food	48.6%	49.9%	48.9%	51.5%	51.2%	54.3%	52.0%
Food truck	NA	23.9%	23.8%	24.0%	32.7%	31.4%	34.2%
Café/ coffee house	58.0%	58.8%	58.8%	64.4%	59.3%	62.3%	61.0%
Ethnic dining	16.5%	14.5%	15.5%	15.4%	15.1%	11.7%	13.3%
Farm-to-table cuisine	NA	NA	NA	NA	5.3%	3.8%	3.5%
Prepared own meal	23.5%	25.2%	25.5%	25.0%	23.9%	22.9%	24.7%

ACTIVITIES - SHOPPING - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	95.9%	91.4%	50.0%	46.5%	86.4%	87.8%
Malls/ department stores	75.0%	49.2%	0.0%	0.0%	42.7%	29.7%
Designer boutiques	15.1%	7.5%	0.0%	0.0%	15.5%	2.7%
Hotel/ resort stores	33.6%	24.1%	0.0%	0.0%	23.6%	11.5%
Swap meet/ flea market	7.1%	5.9%	0.0%	0.0%	8.1%	3.8%
Discount/ outlet stores	34.6%	12.8%	0.0%	0.0%	20.1%	6.5%
Supermarkets	44.6%	50.2%	0.0%	0.0%	50.8%	45.8%
Farmer's market	14.4%	22.0%	0.0%	0.0%	44.6%	23.7%
Convenience stores	69.4%	38.0%	0.0%	26.7%	51.8%	41.2%
Duty-free stores	13.2%	6.4%	0.0%	0.0%	9.7%	3.1%
Hawai'i-made products	32.6%	24.1%	0.0%	19.8%	32.4%	29.0%
Local shops and artisans	38.2%	36.3%	50.0%	19.8%	40.8%	42.0%
Local fashion designers	8.1%	7.0%	0.0%	0.0%	12.3%	8.4%

ACTIVITIES - SHOPPING - OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.0%	96.9%	96.7%	96.2%	97.6%	97.4%	95.1%
Malls/ department stores	81.9%	78.0%	75.1%	75.6%	71.0%	71.1%	71.8%
Designer boutiques	26.1%	23.8%	19.6%	22.0%	19.7%	17.5%	14.6%
Hotel/ resort stores	35.1%	35.2%	33.9%	30.3%	30.2%	32.7%	32.7%
Swap meet/ flea market	13.7%	9.2%	9.8%	8.8%	7.9%	7.2%	7.3%
Discount/ outlet stores	53.3%	49.4%	44.6%	41.3%	35.7%	31.7%	32.7%
Supermarkets	45.0%	54.0%	50.6%	54.1%	46.3%	45.0%	46.0%
Farmer's market	15.1%	17.0%	18.1%	16.7%	18.4%	16.3%	17.3%
Convenience stores	62.0%	65.1%	64.1%	66.6%	63.3%	62.2%	67.1%
Duty-free stores	11.9%	12.5%	10.8%	7.0%	7.1%	8.5%	12.8%
Hawai'i-made products	NA	NA	NA	NA	32.9%	32.0%	32.8%
Local shops and artisans	53.2%	51.3%	50.8%	46.6%	41.3%	41.9%	39.8%
Local fashion designers	NA	NA	NA	NA	NA	NA	8.4%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	74.0%	58.3%	50.0%	19.8%	66.0%	43.5%
Historic military sites and museums	48.7%	3.8%	0.0%	0.0%	19.1%	10.3%
Historic Hawaiian sites and museums	25.3%	11.8%	0.0%	0.0%	28.8%	21.3%
Other historical sites, museums, and homes	10.1%	11.8%	0.0%	19.8%	16.2%	7.6%
Art museums	3.0%	0.0%	0.0%	0.0%	1.3%	3.1%
Art galleries and exhibitions	6.5%	6.4%	0.0%	0.0%	3.2%	5.7%
Lū'au/ Polynesian show/ hula show	23.7%	14.5%	50.0%	0.0%	12.3%	11.8%
Lesson- e.g. ukulele, hula, canoe, lei making	4.1%	3.2%	0.0%	0.0%	5.8%	1.1%
Play/ concert/ theatre	2.3%	0.0%	0.0%	0.0%	1.3%	0.0%
Art/ craft fair	4.3%	15.0%	0.0%	0.0%	13.9%	6.9%
Festival/ events	6.0%	7.0%	0.0%	0.0%	8.8%	1.5%

ACTIVITIES – HISTORY, CULTURE, FINE ARTS – OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	74.0%	74.6%	71.6%	69.1%	66.9%	68.9%	73.0%
Historic military sites and museums	52.8%	45.5%	41.8%	40.5%	31.4%	38.5%	45.1%
Historic Hawaiian sites and museums	NA	NA	NA	NA	26.0%	22.3%	25.6%
Other historical sites, museums, and homes	23.7%	21.7%	21.7%	20.3%	10.2%	9.7%	10.9%
Art museums	*	*	*	*	4.7%	3.6%	2.9%
Art galleries and exhibitions	*	*	*	*	8.0%	6.0%	6.5%
Lū'au/ Polynesian show/ hula show	34.3%	31.5%	28.1%	26.2%	22.6%	21.8%	23.4%
Lesson- e.g. ukulele, hula, canoe, lei making	4.0%	6.6%	6.1%	8.3%	3.2%	4.5%	4.2%
Play/ concert/ theatre	3.2%	4.4%	3.4%	3.0%	3.3%	2.5%	2.2%
Art/ craft fair	5.4%	5.6%	6.9%	5.4%	4.4%	4.5%	5.5%
Festival/ events	6.8%	4.1%	4.8%	2.3%	3.8%	4.8%	6.3%

* Combined Museum/ Art galleries as single option

ACTIVITIES – TRANSPORTATION – OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	96.7%	89.3%	100.0%	46.5%	95.5%	91.2%
Airport shuttle	29.6%	8.6%	0.0%	0.0%	23.3%	13.4%
Trolley	15.3%	0.0%	0.0%	0.0%	5.5%	2.7%
Public bus	25.8%	4.8%	0.0%	0.0%	16.9%	5.7%
Tour bus/ tour van	30.3%	8.6%	100.0%	46.5%	26.9%	22.9%
Taxi/ limo	34.8%	9.6%	0.0%	0.0%	21.4%	13.8%
Rental car	23.4%	52.4%	0.0%	0.0%	51.8%	50.3%
Ride share	47.0%	24.1%	0.0%	0.0%	29.5%	15.3%
Car share	3.1%	1.6%	0.0%	0.0%	3.6%	5.7%
Bicycle rental	1.5%	0.0%	0.0%	0.0%	1.3%	1.1%

ACTIVITIES – TRANSPORTATION – OCEANIA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.7%	96.9%	96.6%	96.7%	97.1%	97.4%	96.2%
Airport shuttle	60.8%	53.1%	48.5%	40.2%	29.8%	30.4%	28.6%
Trolley	23.7%	22.6%	22.8%	21.9%	11.2%	13.5%	14.2%
Public bus	27.7%	30.1%	29.4%	23.4%	24.9%	23.3%	24.5%
Tour bus/ tour van	35.8%	37.0%	35.3%	35.2%	20.7%	24.9%	30.0%
Taxi/ limo	43.2%	39.0%	35.9%	34.8%	36.8%	36.2%	33.2%
Rental car	31.8%	31.0%	32.5%	38.8%	34.1%	28.2%	28.0%
Ride share	NA	20.6%	24.7%	27.1%	37.6%	42.3%	44.5%
Car share	NA	NA	NA	NA	3.2%	3.1%	3.2%
Bicycle rental	NA	1.7%	1.7%	1.6%	2.1%	1.0%	1.5%

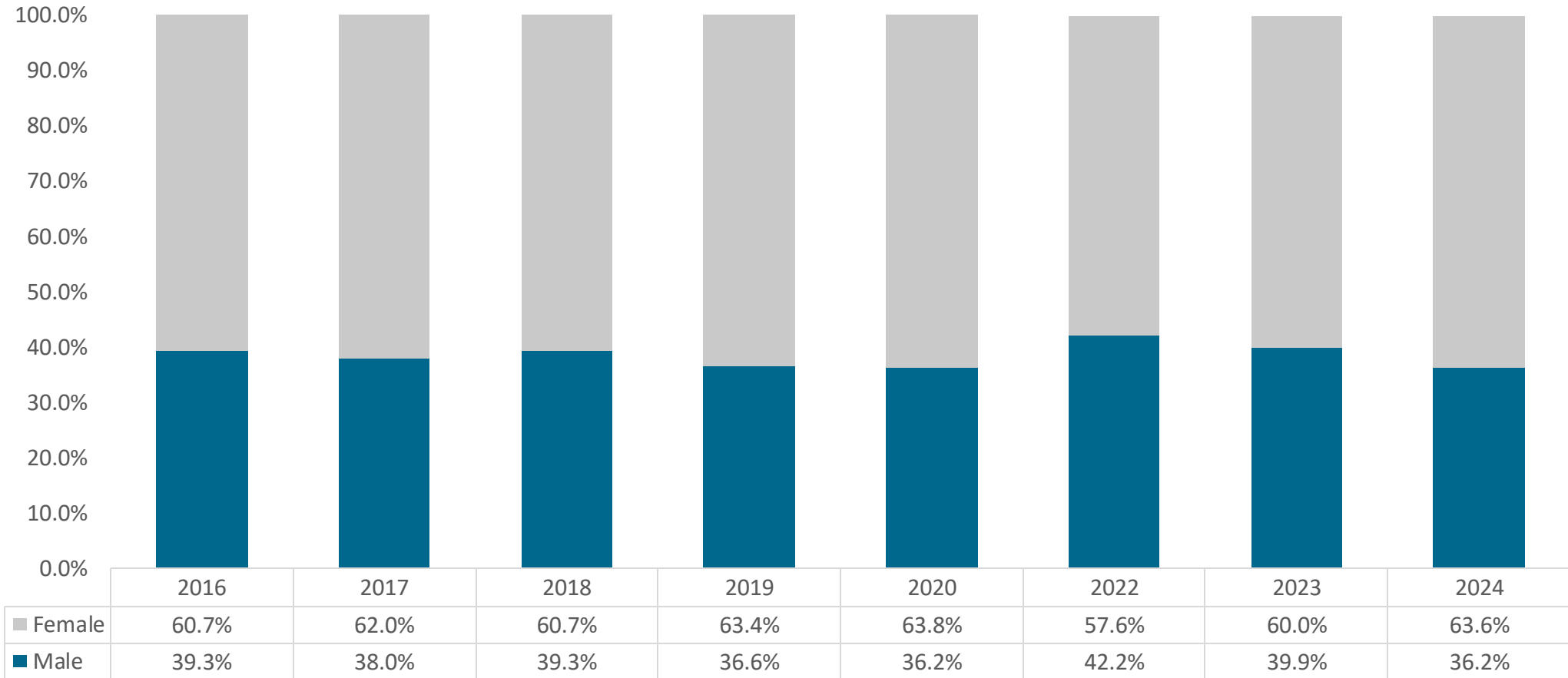
ACTIVITIES - OTHER - OCEANIA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	10.8%	13.4%	0.0%	0.0%	18.1%	13.4%
Visiting friends/ relatives	9.6%	13.4%	0.0%	0.0%	15.5%	13.4%
Giving back to the local community	1.3%	1.6%	0.0%	0.0%	2.6%	0.0%

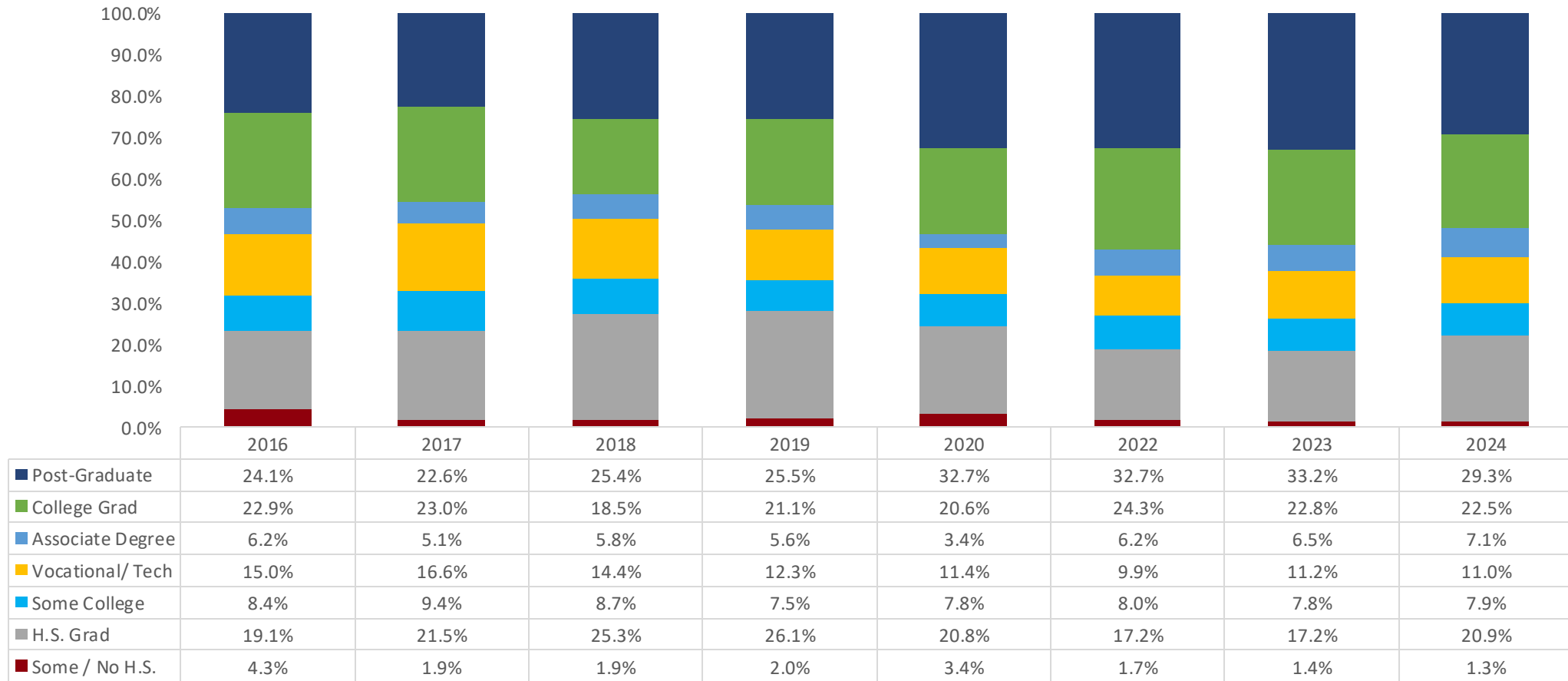
ACTIVITIES - OTHER - OCEANIA

	2018	2019	2020	2022	2023	2024
TOTAL	9.1%	9.2%	6.3%	15.6%	12.6%	11.8%
Visiting friends/ relatives	8.4%	8.8%	6.3%	13.7%	11.0%	10.6%
Giving back to the local community	0.9%	0.7%	0.7%	2.3%	1.8%	1.4%

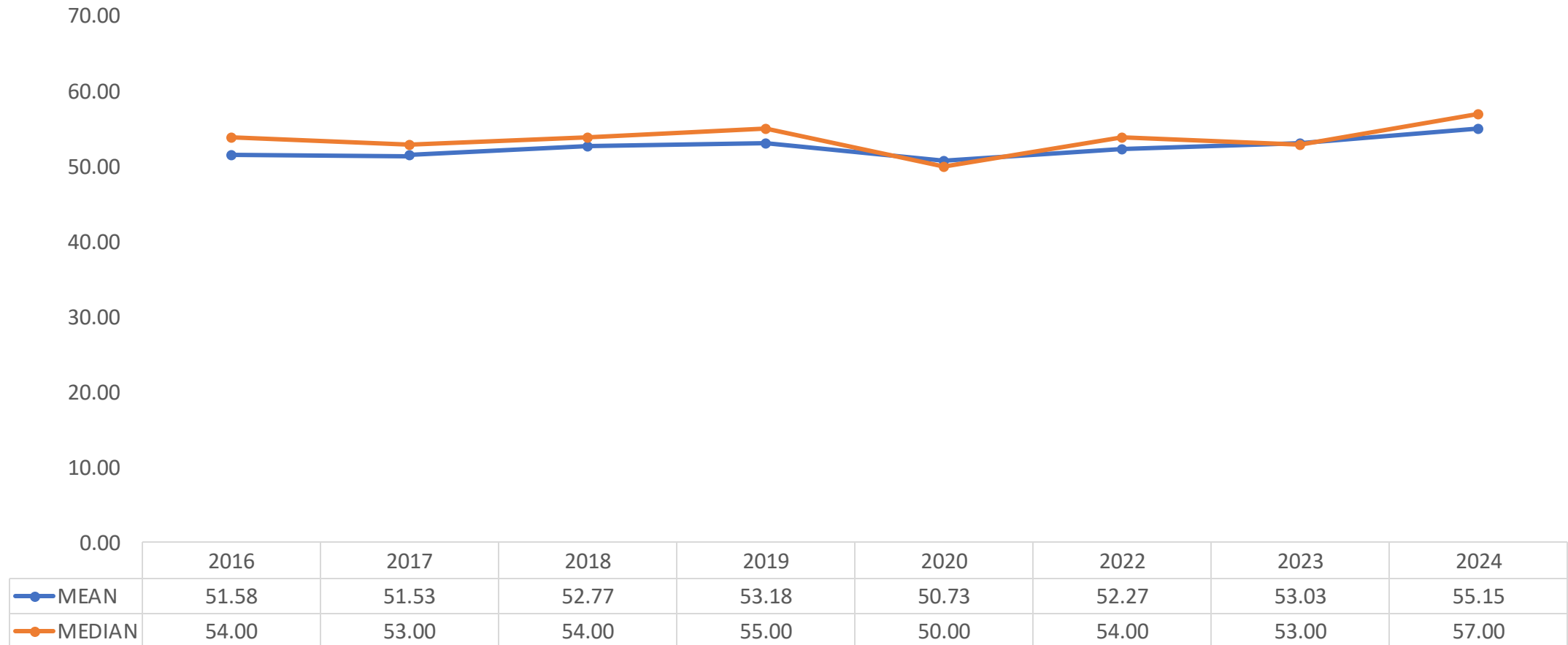
VISITOR PROFILE - GENDER - OCEANIA



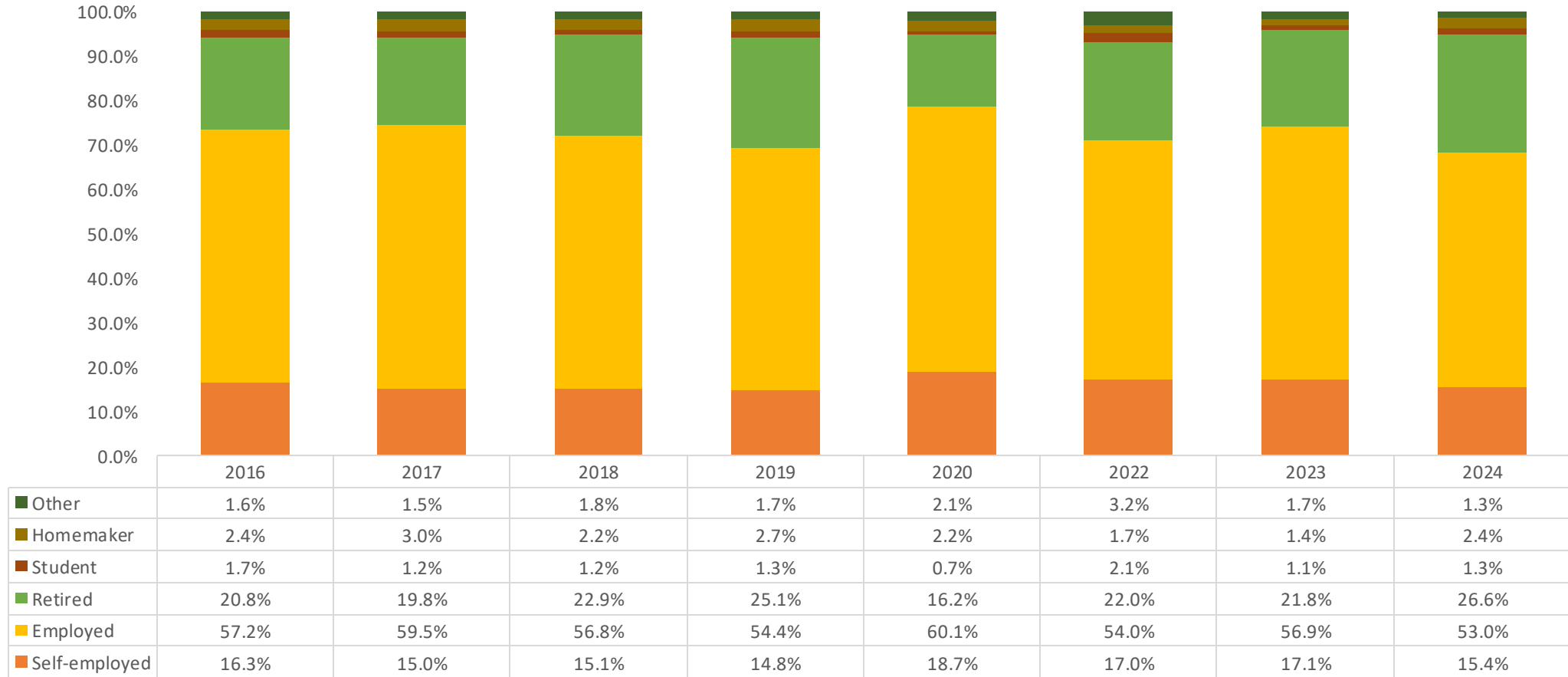
VISITOR PROFILE - EDUCATION - OCEANIA



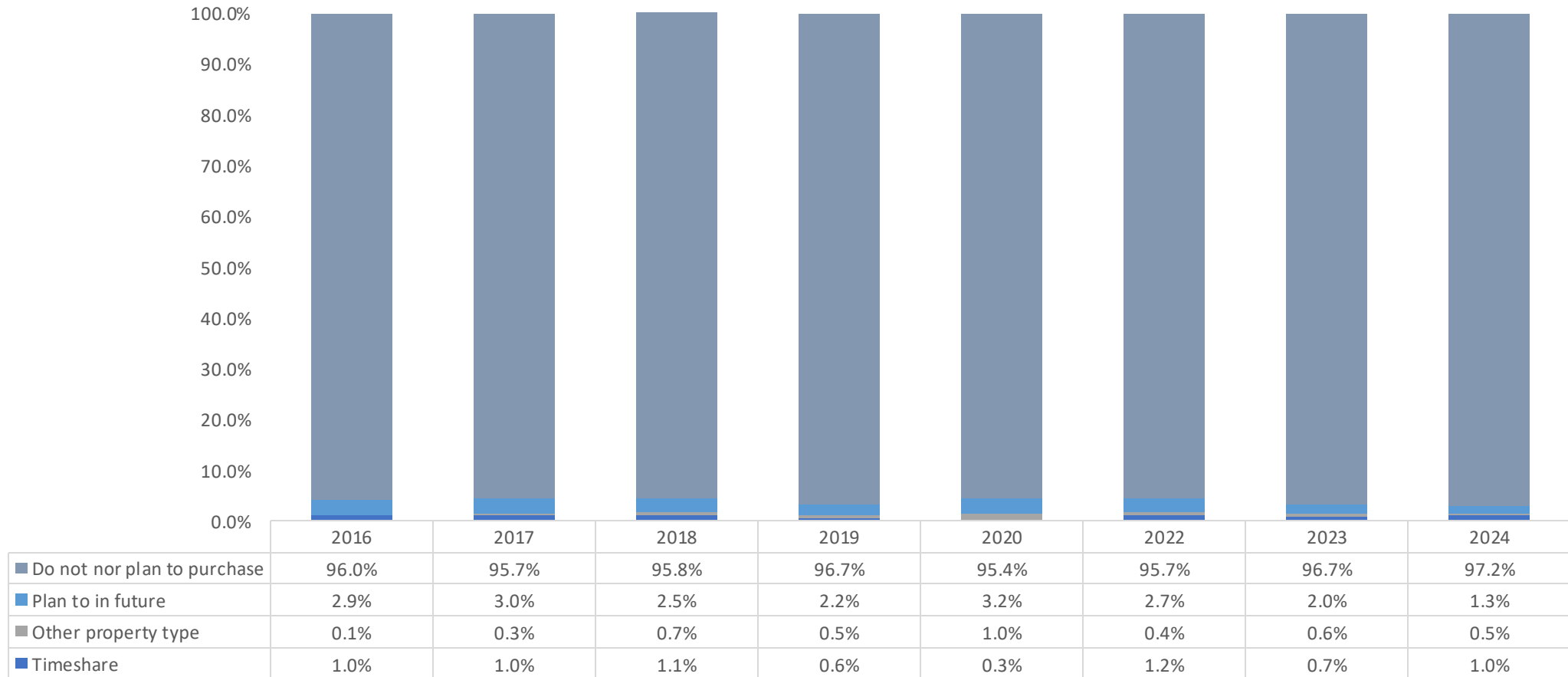
VISITOR PROFILE - AGE - OCEANIA



VISITOR PROFILE - EMPLOYMENT STATUS - OCEANIA



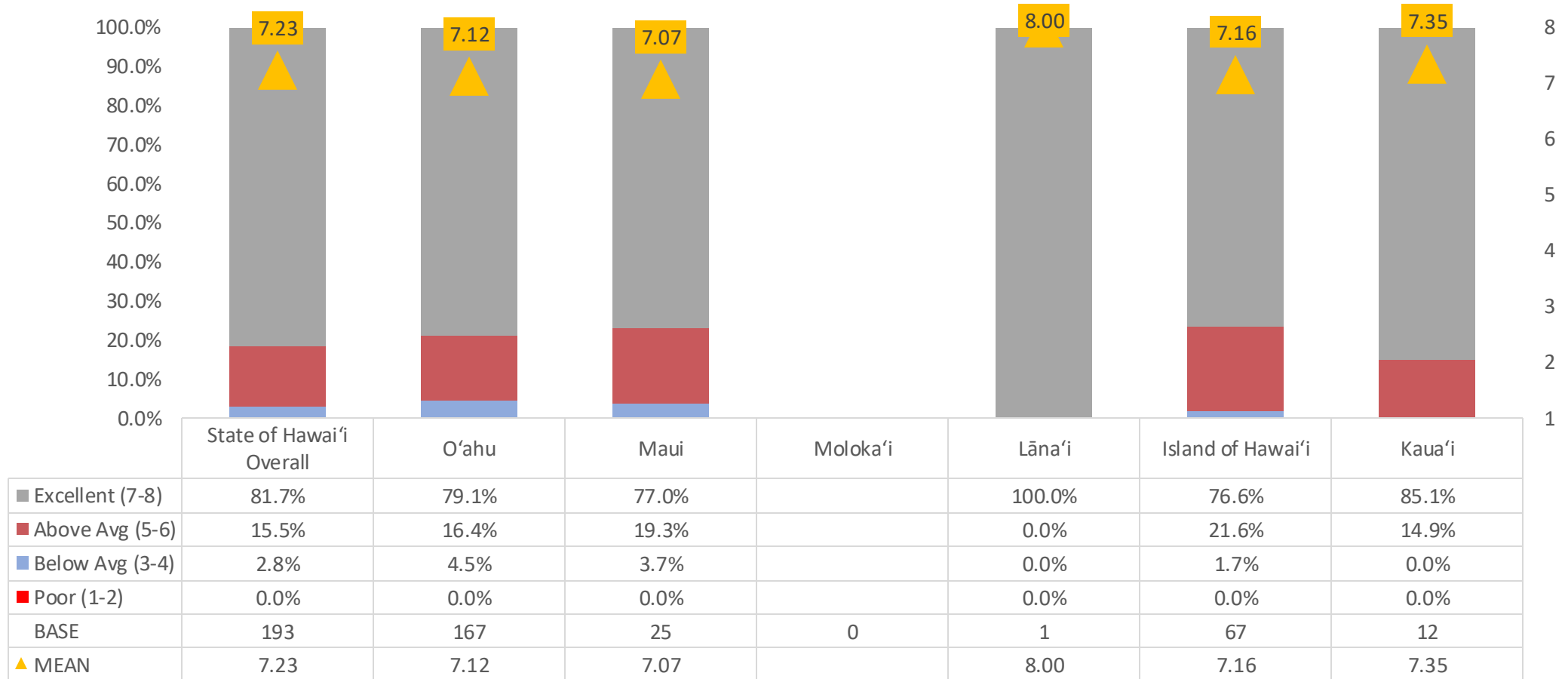
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - OCEANIA



Section 18 – China

OVERALL SATISFACTION - MOST RECENT TRIP - CHINA

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



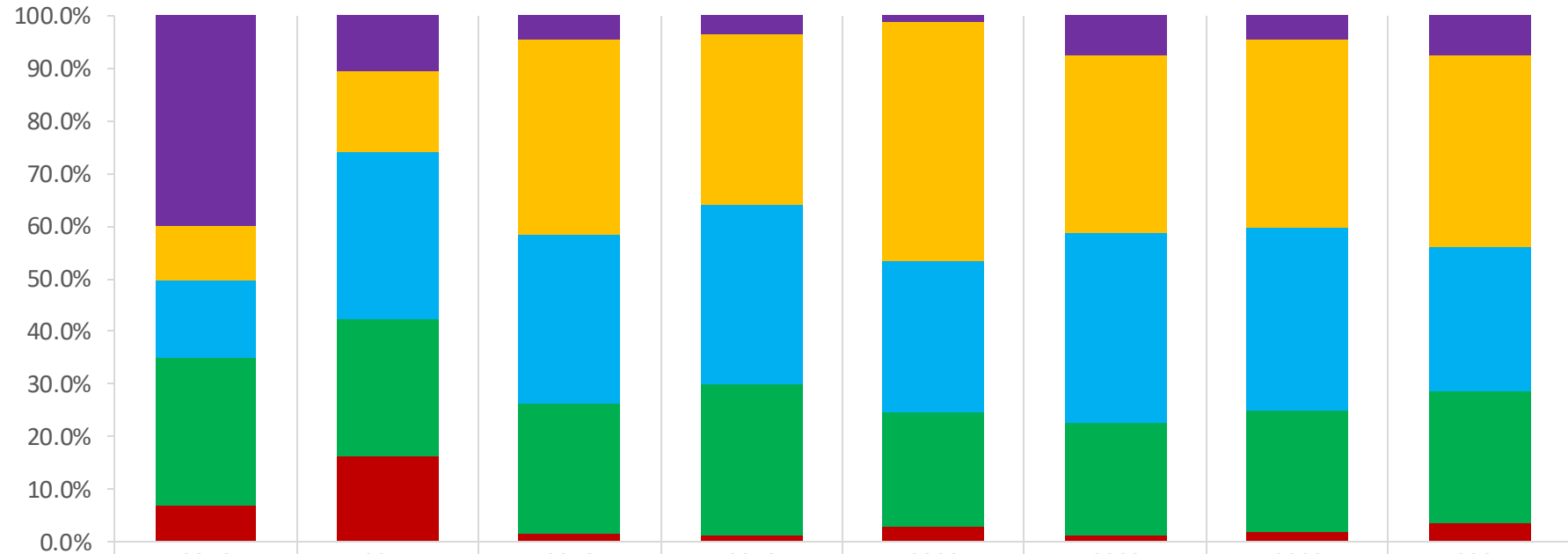
PRIMARY PURPOSE OF TRIP - CHINA

	2018	2019	2020	2022	2023	2024
Vacation	71.2%	72.6%	79.5%	76.7%	71.5%	70.3%
Convention/ conference	2.9%	4.2%	2.7%	4.7%	6.0%	5.4%
Visit friends/ relatives	3.2%	2.4%	4.1%	4.7%	6.4%	4.5%
Honeymoon	3.7%	2.3%	6.8%	5.1%	6.0%	4.4%
Other business trip/ work in Hawai'i	3.8%	5.3%	1.4%	3.2%	1.1%	4.1%
Incentive trip	2.3%	1.1%	2.8%	3.7%	2.0%	2.9%

PRIMARY + SECONDARY PURPOSE OF TRIP - CHINA

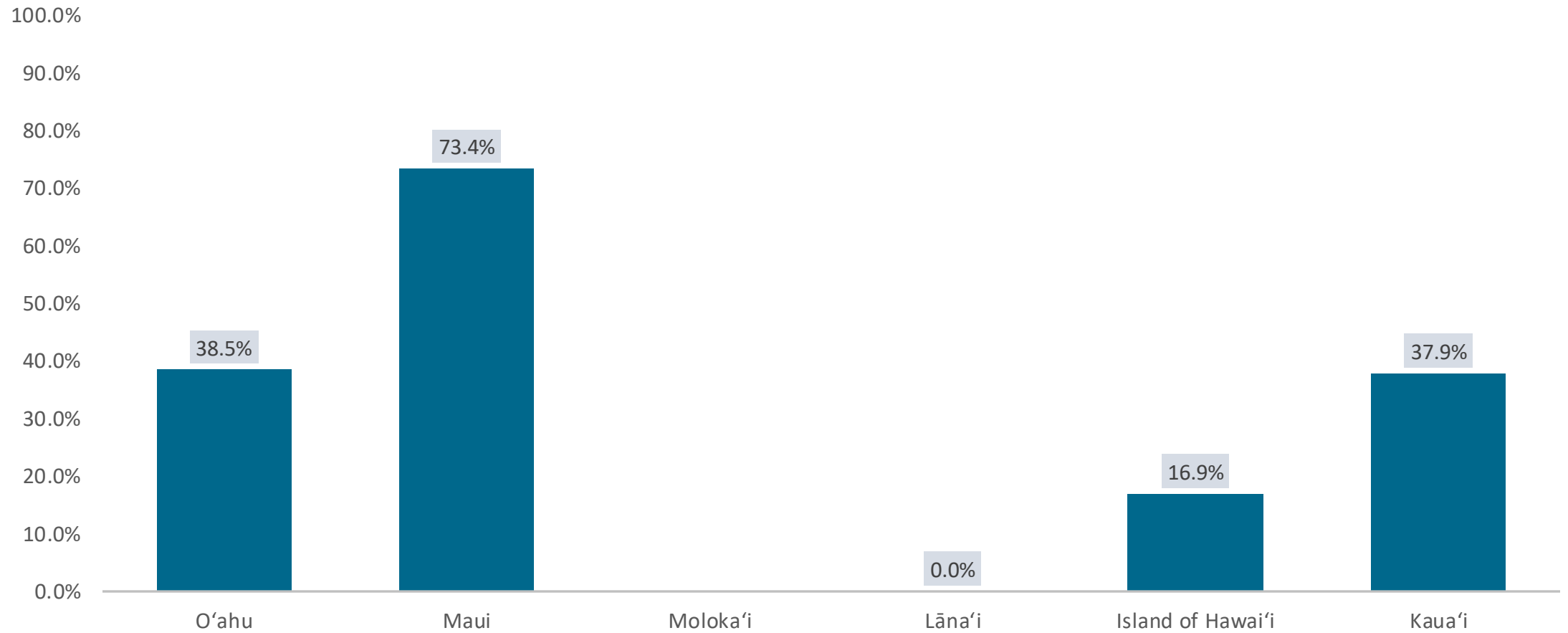
	2018	2019	2020	2022	2023	2024
Vacation	89.0%	88.1%	85.0%	86.6%	86.7%	85.0%
Visit friends/ relatives	6.4%	4.4%	8.2%	8.4%	8.8%	9.3%
Incentive trip	3.5%	2.3%	11.0%	8.1%	5.6%	7.8%
Honeymoon	5.1%	3.0%	8.2%	7.9%	7.9%	7.6%
Convention/ conference	4.0%	5.0%	2.7%	5.8%	7.1%	6.5%
Other business trip/ work in Hawai'i	5.1%	6.3%	9.6%	4.4%	3.1%	6.2%

VACATION TRIP DESCRIPTION - CHINA



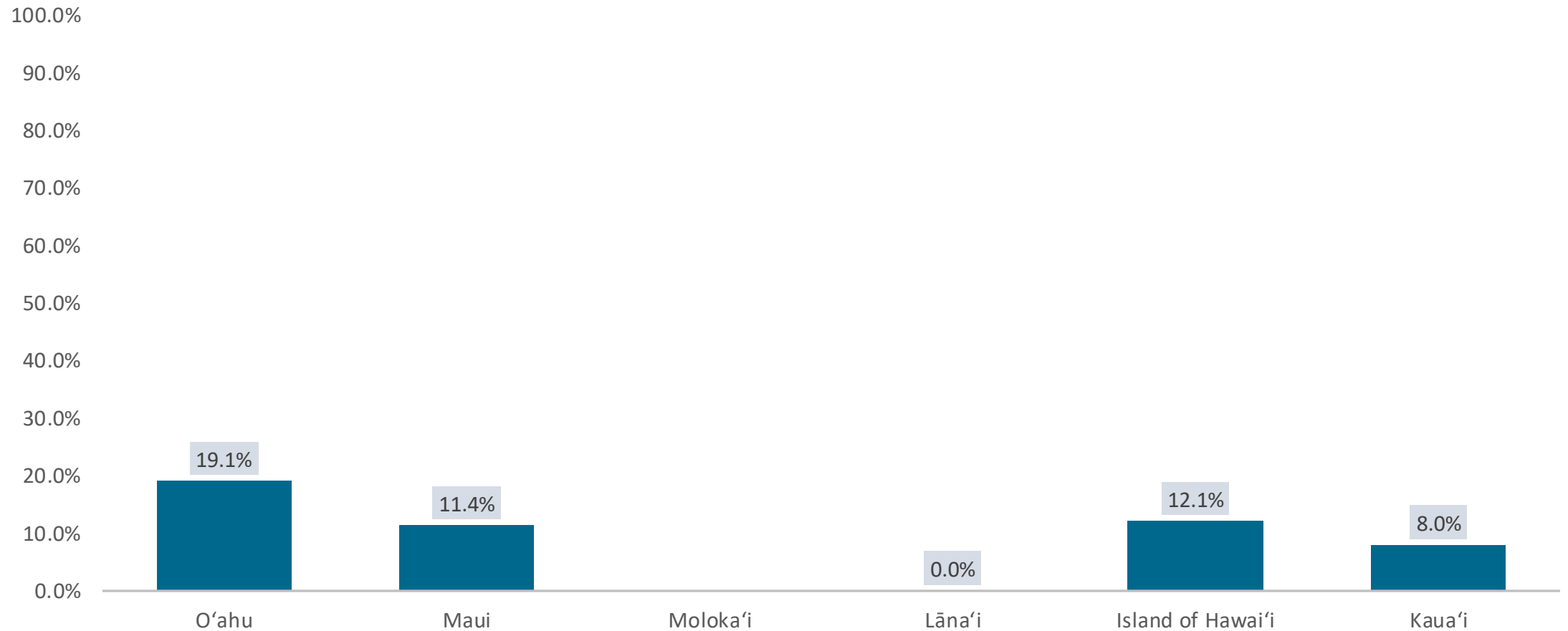
	2016	2017	2018	2019	2020	2022	2023	2024
Once-in-a-lifetime	39.9%	10.4%	4.6%	3.6%	1.4%	7.7%	4.5%	7.4%
Special occasion	10.4%	15.6%	36.9%	32.3%	45.2%	33.7%	35.8%	36.7%
More special than most trips	14.7%	31.8%	32.1%	34.2%	28.9%	36.1%	35.0%	27.4%
Annual/ Semi-annual trip	28.1%	25.9%	24.8%	28.6%	21.9%	21.4%	22.8%	24.9%
Other	6.9%	16.3%	1.6%	1.3%	2.7%	1.2%	2.0%	3.6%

ADVERTISING AWARENESS - CHINA



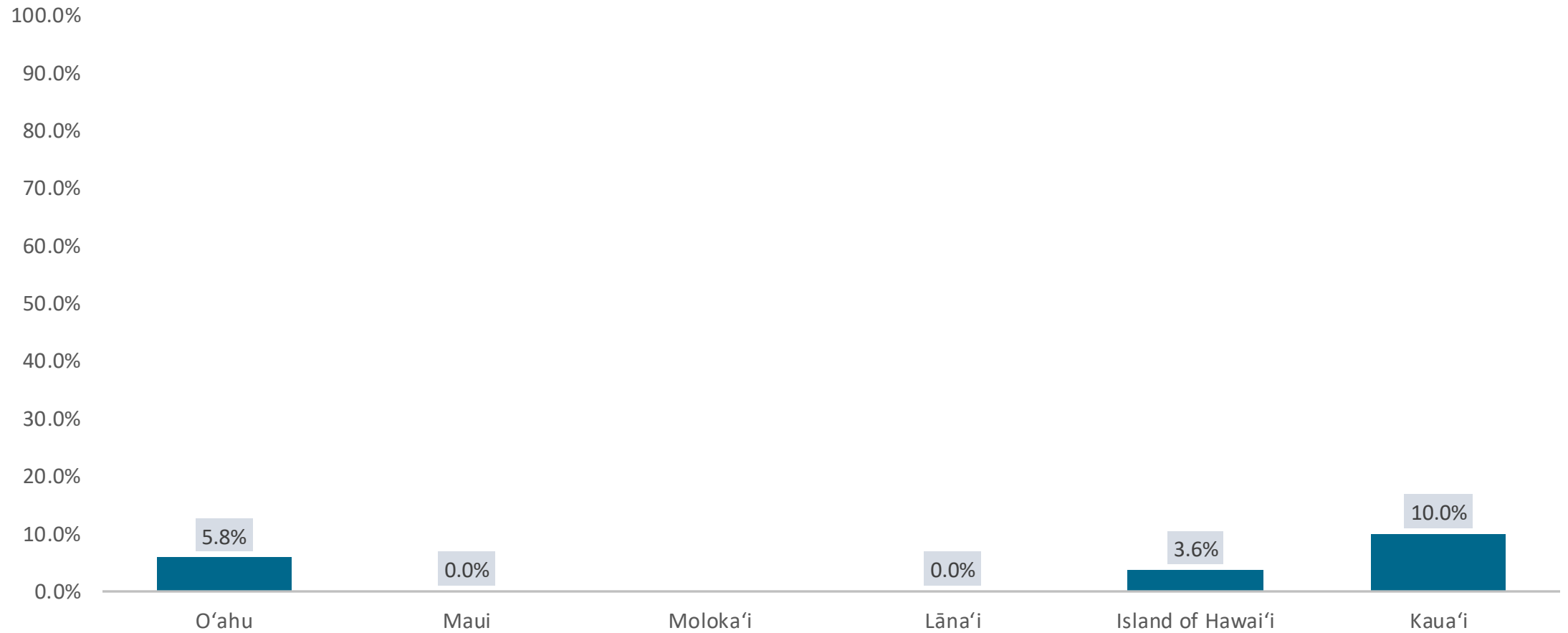
* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF LOCATION FILMING - CHINA



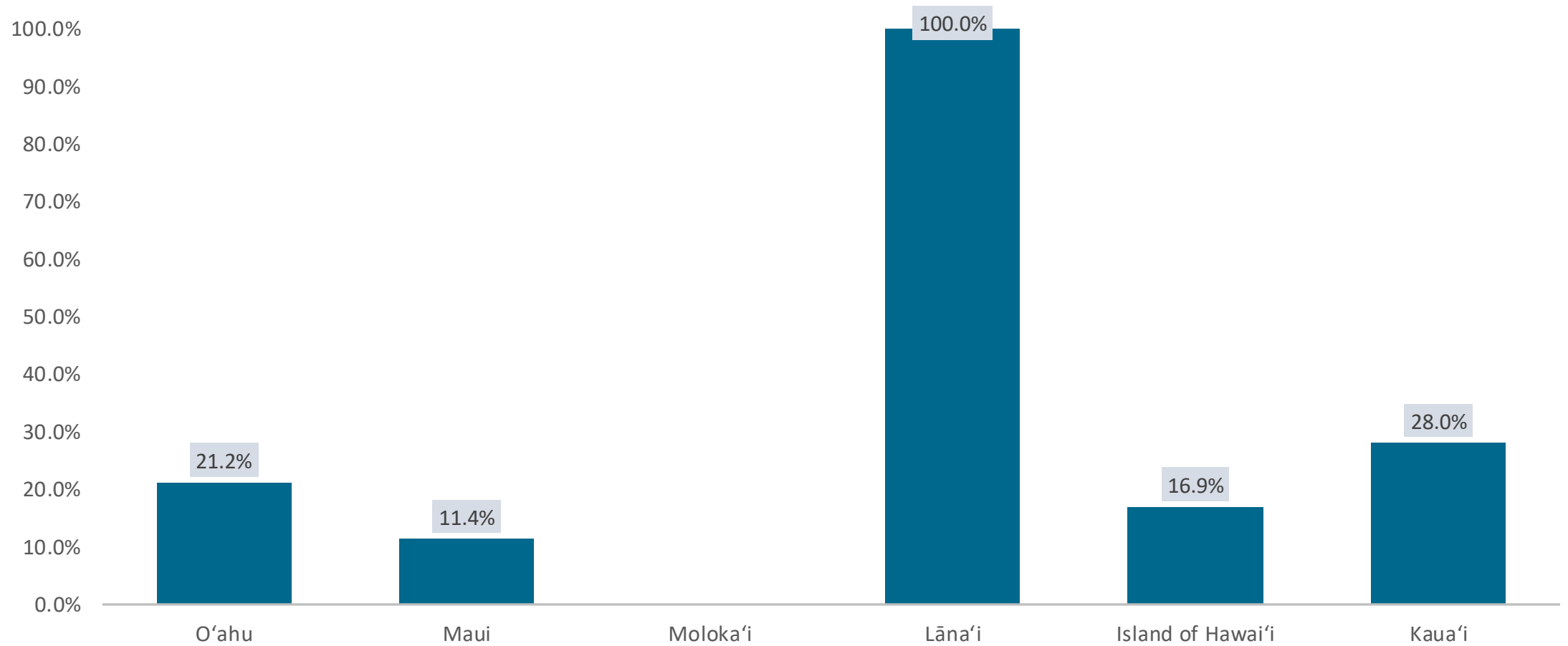
* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN MUSIC - CHINA



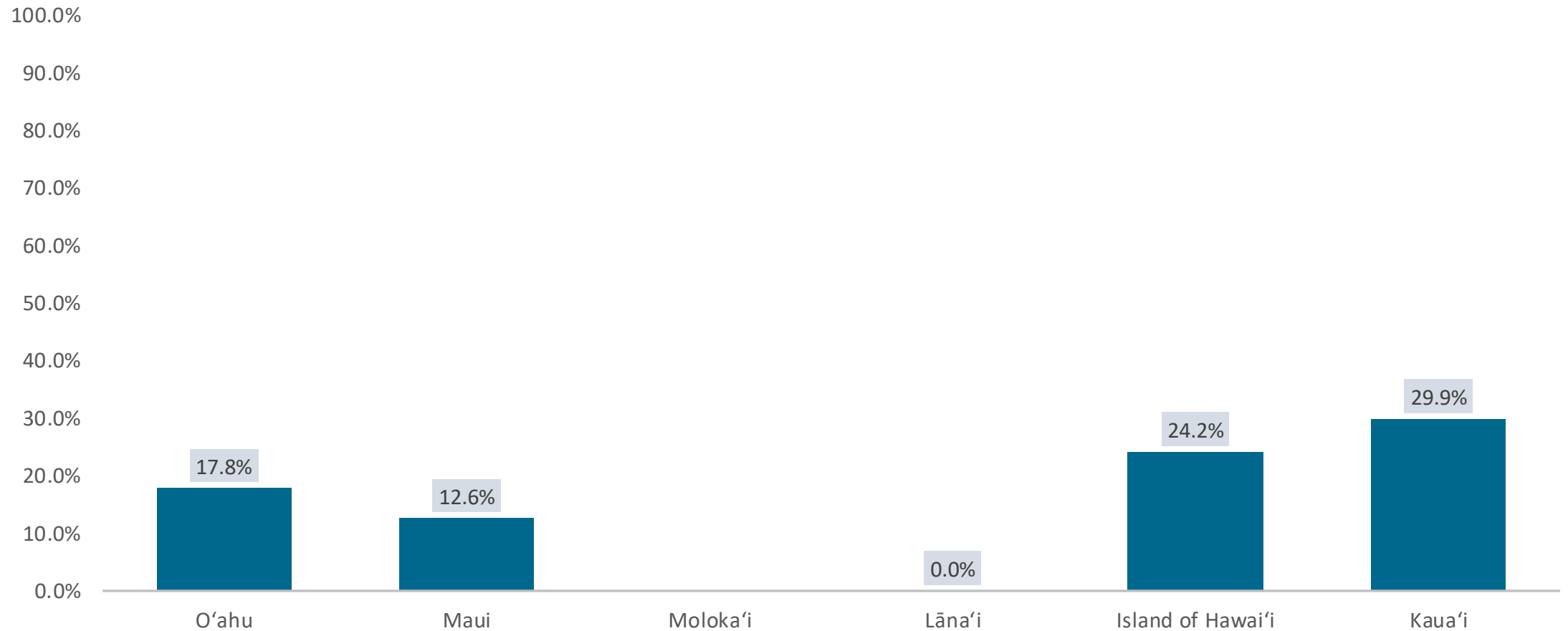
* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - CHINA



* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF OUTDOOR/ SPORTING EVENTS - CHINA



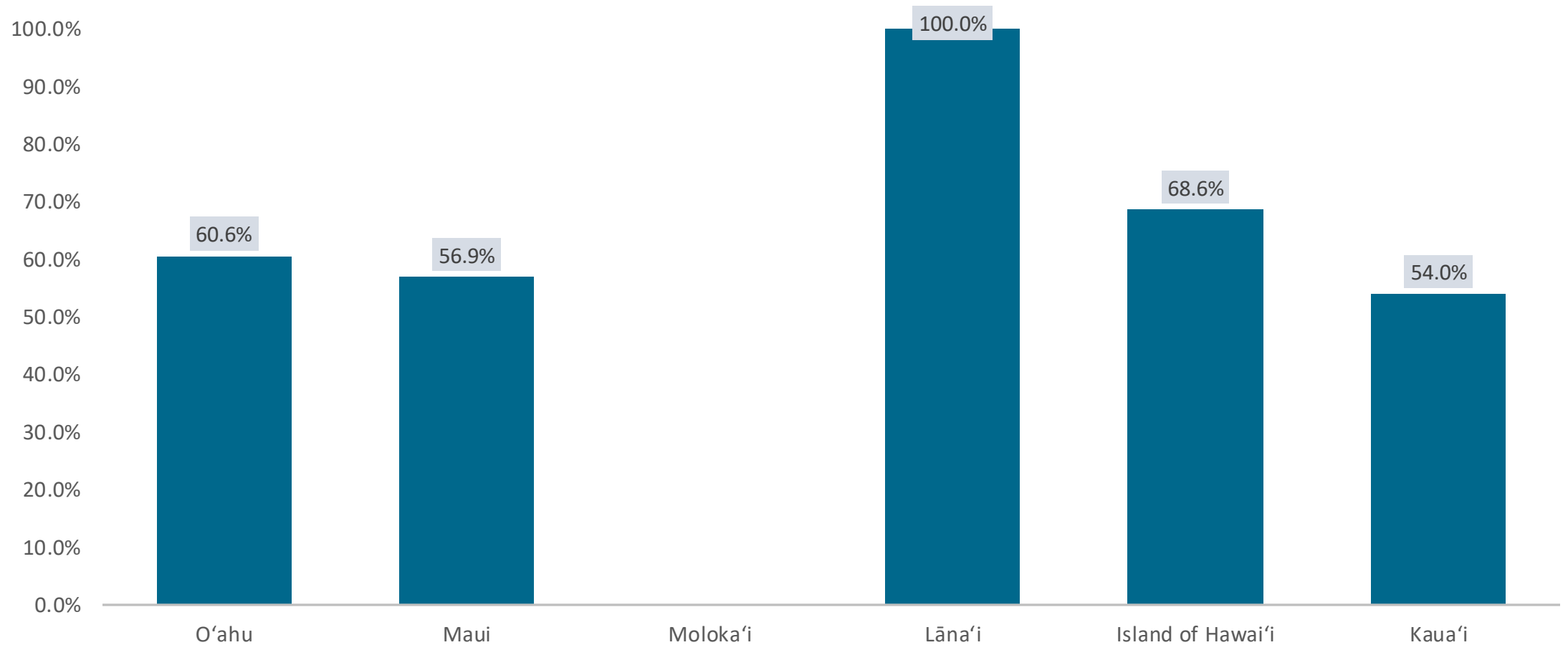
* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN CULTURAL EVENTS - CHINA



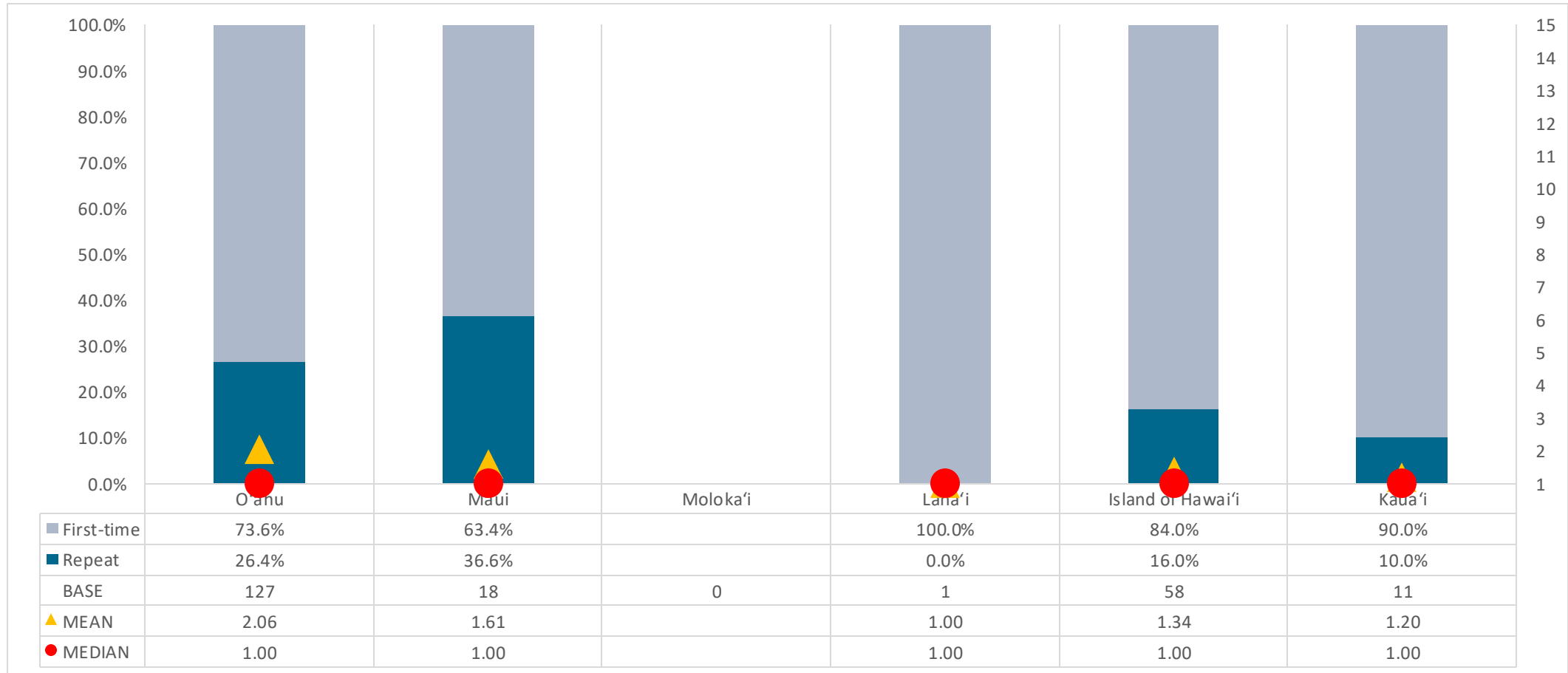
* There were no visitors from China who took part in the study who visited Moloka'i.

IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - CHINA



* There were no visitors from China who took part in the study who visited Moloka'i.

1ST TIME VS REPEAT VISITORS - CHINA

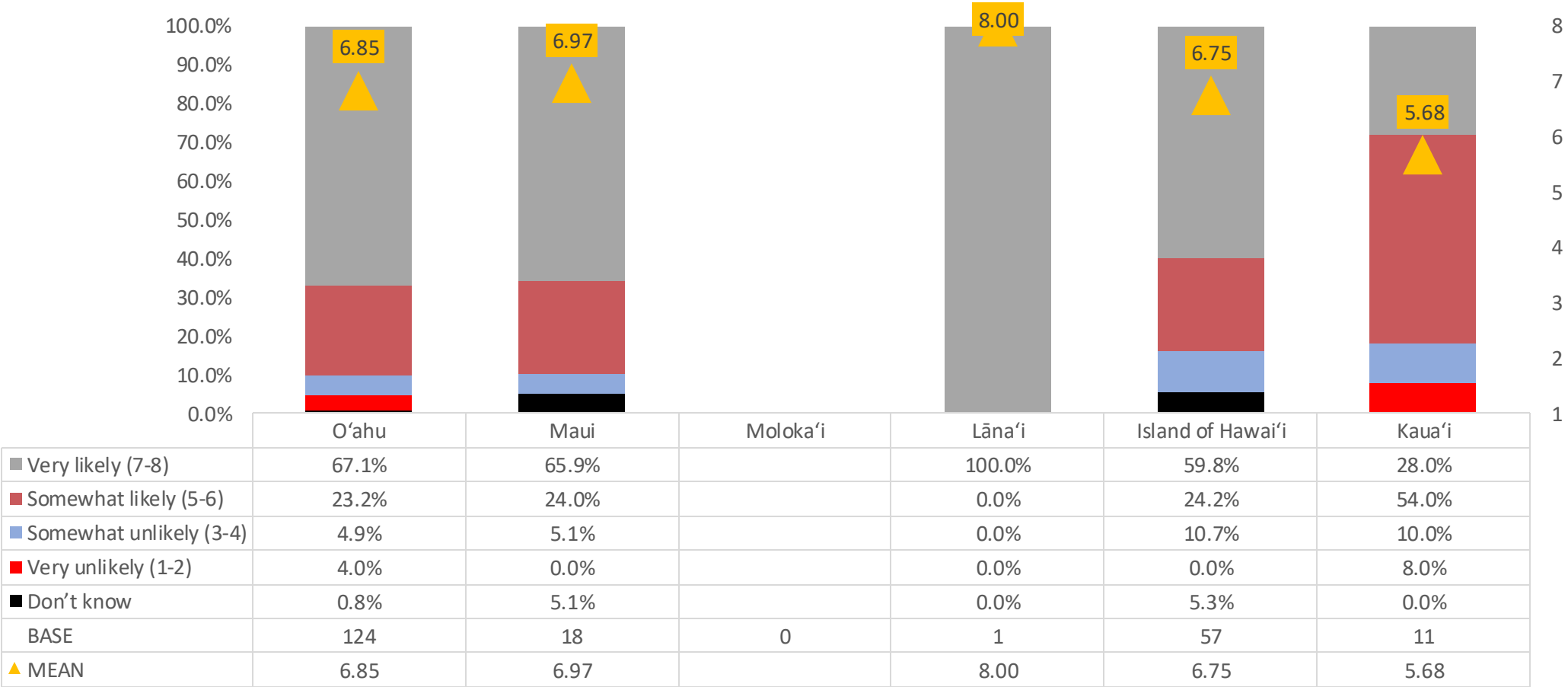


TRAVEL PARTY MEMBERS - CHINA

	2016	2017	2018	2019	2020	2022	2023	2024
My spouse	47.6%	50.4%	45.3%	37.8%	57.5%	29.3%	22.9%	32.5%
Other adult members of my family	21.0%	21.0%	25.0%	20.3%	31.5%	7.9%	16.1%	24.1%
My child(ren)/ grandchild(ren) under 18	15.0%	14.2%	22.4%	15.9%	27.3%	14.2%	14.9%	15.8%
My friends/ associates	21.5%	25.2%	24.3%	29.8%	20.5%	42.0%	29.9%	22.7%
Myself only (traveled alone/ no one else)	13.9%	10.7%	8.5%	11.0%	5.5%	11.0%	20.3%	19.9%
My girlfriend/ boyfriend	4.1%	3.1%	9.7%	9.7%	6.9%	16.4%	12.8%	11.7%
Same-gender partner	1.8%	1.8%	2.2%	1.5%	0.0%	2.7%	2.0%	1.6%

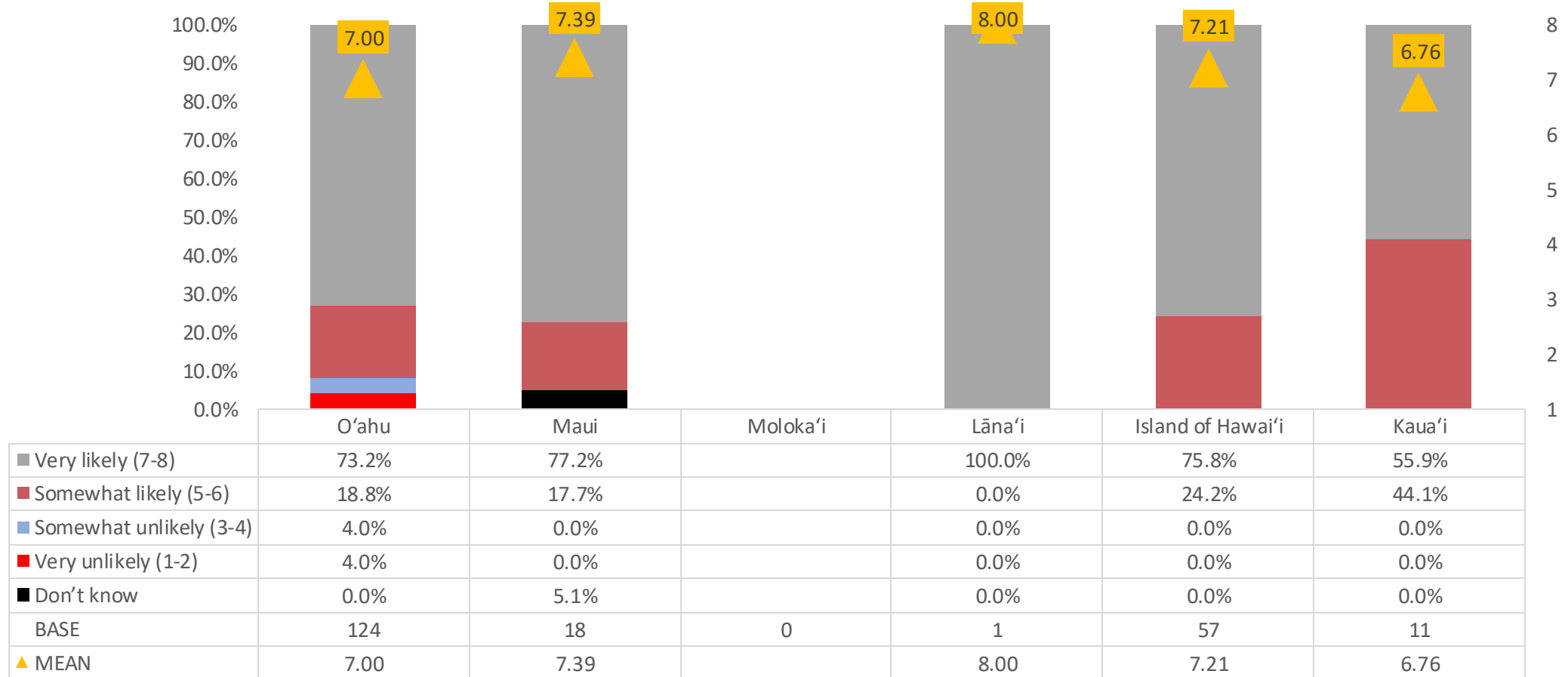
LIKELIHOOD OF RETURN VISIT - CHINA

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



BRAND/ DESTINATION ADVOCACY - CHINA

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



ACTIVITIES - SIGHTSEEING - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	99.0%	100.0%	0.0%	0.0%	100.0%	100.0%
On own (self-guided)/ driving around the island	67.7%	72.2%	0.0%	0.0%	84.6%	80.1%
Helicopter ride/ airplane tour	0.8%	10.2%	0.0%	0.0%	5.4%	19.9%
Boat tour/ submarine ride/ whale watching	29.9%	5.1%	0.0%	0.0%	40.0%	18.0%
Visiting towns/ communities	25.9%	24.0%	0.0%	0.0%	27.1%	37.9%
Private limousine/ van tour/ tour bus	12.9%	5.1%	0.0%	0.0%	10.0%	10.0%
Scenic views/ natural landmarks	74.9%	83.5%	0.0%	0.0%	66.6%	37.9%
Movie and TV filming location tours	17.2%	0.0%	0.0%	0.0%	13.8%	0.0%

ACTIVITIES - SIGHTSEEING - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.2%	95.7%	96.0%	94.5%	99.5%	97.3%	99.3%
On own (self-guided)/ driving around the island	63.5%	59.6%	55.6%	56.2%	71.4%	64.3%	73.5%
Helicopter ride/ airplane tour	14.3%	22.8%	20.8%	27.4%	5.2%	5.5%	4.6%
Boat tour/ submarine ride/ whale watching	30.4%	27.6%	27.4%	27.3%	46.3%	27.5%	31.3%
Visiting towns/ communities	20.7%	31.3%	30.9%	28.7%	31.9%	26.9%	29.0%
Private limousine/ van tour/ tour bus	22.0%	18.4%	14.8%	20.5%	10.9%	12.6%	11.9%
Scenic views/ natural landmarks	65.5%	56.3%	46.3%	60.2%	71.1%	67.6%	71.4%
Movie and TV filming location tours	21.3%	29.6%	28.4%	39.7%	16.4%	8.6%	13.2%

ACTIVITIES - RECREATION - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.4%	100.0%	0.0%	0.0%	95.0%	100.0%
Beach/ sunbathing	86.3%	73.4%	0.0%	0.0%	77.5%	37.9%
Bodyboarding	6.7%	0.0%	0.0%	0.0%	1.7%	0.0%
Stand-up paddle boarding	5.1%	0.0%	0.0%	0.0%	3.3%	0.0%
Surfing	7.7%	11.4%	0.0%	0.0%	2.1%	0.0%
Canoe paddling	2.4%	0.0%	0.0%	0.0%	3.3%	0.0%
Kayaking	5.7%	0.0%	0.0%	0.0%	2.1%	8.0%
Swimming in the ocean	42.7%	40.4%	0.0%	0.0%	34.2%	19.9%
Snorkeling	33.9%	21.5%	0.0%	0.0%	29.1%	28.0%
Freediving	8.9%	0.0%	0.0%	0.0%	1.7%	0.0%
Windsurfing/ kitesurfing	0.0%	5.1%	0.0%	0.0%	1.7%	0.0%
Jet skiing/ parasailing	3.2%	5.1%	0.0%	0.0%	1.7%	0.0%
Scuba diving	3.0%	0.0%	0.0%	0.0%	4.1%	0.0%
Fishing	5.9%	0.0%	0.0%	0.0%	5.4%	0.0%
Golf	1.0%	5.1%	0.0%	0.0%	0.0%	0.0%

ACTIVITIES - RECREATION - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	94.7%	94.1%	93.5%	95.9%	98.3%	96.8%	97.4%
Beach/ sunbathing	81.9%	75.1%	71.3%	78.0%	80.2%	75.6%	83.0%
Bodyboarding	6.2%	4.0%	2.4%	2.8%	7.6%	5.5%	5.0%
Stand-up paddle boarding	*	*	*	2.8%	10.9%	4.8%	3.9%
Surfing	7.6%	7.9%	6.7%	5.5%	13.7%	11.2%	7.0%
Canoe paddling	3.9%	3.8%	3.1%	0.0%	12.0%	9.0%	1.6%
Kayaking	**	**	**	**	**	**	5.0%
Swimming in the ocean	NA	39.2%	34.3%	27.4%	47.6%	38.7%	41.9%
Snorkeling	NA	21.0%	22.6%	21.9%	45.3%	29.3%	34.7%
Freediving	NA	NA	NA	9.6%	2.3%	2.6%	6.4%
Windsurfing/ kitesurfing	1.3%	1.9%	0.9%	0.0%	0.0%	0.9%	1.1%
Jet skiing/ parasailing	2.3%	1.1%	1.1%	1.4%	2.7%	4.1%	2.6%
Scuba diving	4.5%	3.6%	4.1%	1.4%	3.2%	4.1%	2.6%
Fishing	4.1%	4.9%	3.5%	2.7%	0.7%	4.4%	5.0%
Golf	2.8%	5.7%	4.2%	2.7%	1.3%	3.5%	1.2%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	98.4%	100.0%	0.0%	0.0%	95.0%	100.0%
Running/ jogging/ fitness walking	22.8%	22.8%	0.0%	0.0%	9.2%	10.0%
Cycling	3.6%	0.0%	0.0%	0.0%	1.7%	10.0%
Spa	0.8%	5.1%	0.0%	0.0%	1.7%	0.0%
Hiking	42.8%	60.8%	0.0%	0.0%	58.8%	72.0%
Backpacking/ camping	4.8%	5.1%	0.0%	0.0%	1.7%	0.0%
Agritourism	15.5%	5.1%	0.0%	0.0%	6.7%	0.0%
Sports event or tournament	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Parks/ botanical gardens	33.3%	20.3%	0.0%	0.0%	28.3%	19.9%
Waterparks	4.4%	0.0%	0.0%	0.0%	3.3%	10.0%
Mountain tubing/ waterfall rappel	1.0%	15.2%	0.0%	0.0%	3.7%	8.0%
Zip-lining	2.4%	5.1%	0.0%	0.0%	5.0%	0.0%
Skydiving	6.7%	0.0%	0.0%	0.0%	1.7%	0.0%
All-terrain vehicle (ATV)	3.6%	0.0%	0.0%	0.0%	3.3%	0.0%
Horseback riding	7.3%	0.0%	0.0%	0.0%	5.0%	0.0%

ACTIVITIES - RECREATION - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	94.7%	94.1%	93.5%	95.9%	98.3%	96.8%	97.4%
Running/ jogging/ fitness walking	22.4%	20.6%	13.7%	20.5%	15.0%	16.1%	21.0%
Cycling	NA	NA	NA	NA	3.5%	5.3%	3.5%
Spa	2.6%	5.5%	6.4%	2.7%	7.0%	7.5%	1.6%
Hiking	20.4%	13.7%	31.7%	38.4%	55.0%	53.2%	52.1%
Backpacking/ camping	*	*	4.3%	6.9%	4.4%	5.0%	4.2%
Agritourism	24.5%	17.3%	17.1%	26.0%	16.3%	14.7%	11.9%
Sports event or tournament	2.2%	1.7%	1.3%	0.0%	0.5%	2.6%	0.7%
Parks/ botanical gardens	50.2%	41.1%	32.1%	42.4%	38.5%	36.4%	31.3%
Waterparks	NA	13.1%	9.9%	9.6%	3.0%	4.4%	4.6%
Mountain tubing/ waterfall rappel	NA	1.5%	0.8%	0.0%	4.9%	0.0%	3.9%
Zip-lining	NA	1.9%	1.3%	0.0%	2.7%	1.7%	3.2%
Skydiving	NA	10.9%	5.4%	2.8%	6.2%	1.5%	4.5%
All-terrain vehicle (ATV)	NA	7.3%	7.9%	12.3%	6.1%	4.8%	3.4%
Horseback riding	NA	11.1%	6.6%	5.5%	5.3%	2.9%	5.9%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.6%	94.9%	0.0%	0.0%	98.3%	92.0%
Lunch/ sunset/ dinner/ evening cruise	56.8%	39.2%	0.0%	0.0%	44.1%	16.1%
Live music/ stage show	21.8%	11.4%	0.0%	0.0%	7.5%	0.0%
Nightclub/ dancing/ bar/ karaoke	1.8%	0.0%	0.0%	0.0%	3.3%	0.0%
Fine dining	39.8%	21.5%	0.0%	0.0%	29.6%	28.0%
Family restaurant	23.1%	0.0%	0.0%	0.0%	16.2%	37.9%
Fast food	46.6%	44.3%	0.0%	0.0%	45.5%	34.1%
Food truck	33.4%	30.3%	0.0%	0.0%	20.0%	55.9%
Café/ coffee house	47.9%	35.4%	0.0%	0.0%	36.2%	37.9%
Ethnic dining	23.6%	21.5%	0.0%	0.0%	17.1%	0.0%
Farm-to-table cuisine	5.3%	5.1%	0.0%	0.0%	0.0%	0.0%
Prepared own meal	11.3%	17.7%	0.0%	0.0%	21.3%	26.0%

ACTIVITIES - ENTERTAINMENT & DINING - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	95.5%	96.1%	95.9%	95.9%	97.3%	98.0%	97.8%
Lunch/ sunset/ dinner/ evening cruise	56.3%	60.7%	56.6%	54.9%	52.1%	47.8%	52.8%
Live music/ stage show	24.3%	16.2%	14.9%	15.1%	12.2%	23.3%	18.0%
Nightclub/ dancing/ bar/ karaoke	6.7%	9.7%	10.7%	1.4%	5.2%	3.5%	2.2%
Fine dining	52.3%	47.6%	47.4%	42.5%	33.0%	44.7%	36.5%
Family restaurant	21.6%	19.1%	23.4%	31.5%	24.0%	23.8%	22.5%
Fast food	48.9%	43.5%	43.5%	49.3%	44.7%	42.2%	48.4%
Food truck	NA	18.4%	22.9%	15.1%	37.6%	36.6%	33.7%
Café/ coffee house	28.6%	37.3%	35.5%	30.1%	48.8%	48.0%	47.7%
Ethnic dining	20.4%	18.5%	22.1%	30.1%	16.2%	18.3%	21.2%
Farm-to-table cuisine	NA	NA	NA	NA	7.5%	6.1%	4.1%
Prepared own meal	21.3%	18.0%	20.7%	24.7%	16.8%	18.2%	16.1%

ACTIVITIES - SHOPPING - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.0%	89.8%	0.0%	0.0%	93.3%	83.9%
Malls/ department stores	68.5%	45.5%	0.0%	0.0%	32.1%	19.9%
Designer boutiques	12.4%	0.0%	0.0%	0.0%	3.3%	0.0%
Hotel/ resort stores	27.1%	25.2%	0.0%	0.0%	10.8%	10.0%
Swap meet/ flea market	5.0%	0.0%	0.0%	0.0%	1.7%	0.0%
Discount/ outlet stores	10.5%	0.0%	0.0%	0.0%	6.7%	0.0%
Supermarkets	52.9%	34.1%	0.0%	0.0%	48.3%	37.9%
Farmer's market	15.8%	5.1%	0.0%	0.0%	30.4%	28.0%
Convenience stores	56.2%	17.7%	0.0%	0.0%	37.1%	19.9%
Duty-free stores	31.3%	0.0%	0.0%	0.0%	6.7%	0.0%
Hawai'i-made products	38.4%	27.8%	0.0%	0.0%	20.4%	37.9%
Local shops and artisans	28.3%	21.5%	0.0%	0.0%	15.8%	46.0%
Local fashion designers	7.9%	5.1%	0.0%	0.0%	0.0%	0.0%

ACTIVITIES - SHOPPING - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.2%	93.9%	93.2%	95.9%	91.8%	93.0%	94.2%
Malls/ department stores	78.7%	66.5%	62.3%	68.5%	52.7%	63.9%	58.9%
Designer boutiques	13.7%	9.0%	11.8%	4.1%	10.7%	15.9%	9.3%
Hotel/ resort stores	18.6%	24.7%	22.8%	20.5%	21.6%	21.2%	24.7%
Swap meet/ flea market	6.6%	4.4%	5.3%	1.4%	3.5%	4.6%	3.8%
Discount/ outlet stores	34.0%	40.7%	41.7%	34.2%	4.6%	8.8%	8.5%
Supermarkets	40.6%	62.2%	59.9%	69.8%	50.2%	44.1%	51.9%
Farmer's market	13.3%	13.1%	13.3%	15.1%	35.2%	24.4%	21.8%
Convenience stores	44.3%	42.2%	42.2%	45.2%	52.6%	43.9%	49.0%
Duty-free stores	61.4%	50.7%	54.8%	48.0%	6.5%	17.8%	21.8%
Hawai'i-made products	NA	NA	NA	NA	23.6%	36.4%	35.7%
Local shops and artisans	29.7%	24.8%	29.4%	23.3%	29.2%	32.4%	27.4%
Local fashion designers	NA	NA	NA	NA	NA	NA	5.8%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	79.8%	39.2%	0.0%	0.0%	73.3%	47.9%
Historic military sites and museums	48.1%	0.0%	0.0%	0.0%	17.1%	0.0%
Historic Hawaiian sites and museums	29.7%	10.2%	0.0%	0.0%	30.8%	29.9%
Other historical sites, museums, and homes	15.4%	6.3%	0.0%	0.0%	15.4%	8.0%
Art museums	7.7%	0.0%	0.0%	0.0%	5.0%	0.0%
Art galleries and exhibitions	3.7%	0.0%	0.0%	0.0%	1.7%	0.0%
Lū'au/ Polynesian show/ hula show	16.0%	16.5%	0.0%	0.0%	13.8%	10.0%
Lesson- e.g. ukulele, hula, canoe, lei making	7.9%	0.0%	0.0%	0.0%	7.1%	0.0%
Play/ concert/ theatre	4.2%	0.0%	0.0%	0.0%	1.7%	0.0%
Art/ craft fair	6.7%	11.4%	0.0%	0.0%	5.0%	10.0%
Festival/ events	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	84.6%	80.9%	78.7%	78.0%	61.4%	68.0%	75.6%
Historic military sites and museums	67.6%	51.9%	43.0%	52.0%	23.4%	29.9%	34.7%
Historic Hawaiian sites and museums	NA	NA	NA	NA	19.9%	20.5%	29.0%
Other historical sites, museums, and homes	23.1%	28.6%	27.3%	28.8%	13.1%	12.5%	15.6%
Art museums	*	*	*	*	6.4%	7.0%	6.7%
Art galleries and exhibitions	*	*	*	*	6.4%	5.2%	3.0%
Lū'au/ Polynesian show/ hula show	17.9%	13.2%	16.4%	9.6%	10.8%	14.8%	15.8%
Lesson- e.g. ukulele, hula, canoe, lei making	3.5%	10.7%	11.7%	5.5%	5.0%	9.0%	7.5%
Play/ concert/ theatre	5.2%	3.8%	3.8%	2.7%	1.8%	5.2%	3.3%
Art/ craft fair	7.0%	11.7%	11.6%	13.7%	9.6%	6.6%	7.4%
Festival/ events	3.6%	1.8%	1.8%	2.7%	1.7%	3.5%	0.7%

* Combined Museum/ Art galleries as a single option

ACTIVITIES - TRANSPORTATION - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'	KAUA'I
TOTAL	91.1%	94.9%	0.0%	0.0%	95.0%	82.0%
Airport shuttle	10.9%	12.6%	0.0%	0.0%	15.4%	8.0%
Trolley	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Public bus	22.0%	0.0%	0.0%	0.0%	10.4%	10.0%
Tour bus/ tour van	10.5%	6.3%	0.0%	0.0%	8.8%	10.0%
Taxi/ limo	12.5%	10.2%	0.0%	0.0%	7.1%	0.0%
Rental car	39.0%	72.2%	0.0%	0.0%	68.7%	62.1%
Ride share	47.2%	0.0%	0.0%	0.0%	15.8%	0.0%
Car share	3.6%	5.1%	0.0%	0.0%	0.0%	0.0%
Bicycle rental	3.7%	0.0%	0.0%	0.0%	0.0%	10.0%

ACTIVITIES - TRANSPORTATION - CHINA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.1%	92.7%	84.4%	84.9%	96.9%	94.1%	92.9%
Airport shuttle	31.9%	19.5%	13.5%	11.0%	17.9%	13.2%	13.9%
Trolley	3.4%	8.0%	4.9%	5.5%	0.7%	3.5%	2.9%
Public bus	18.6%	18.8%	15.0%	16.5%	13.0%	16.6%	17.0%
Tour bus/ tour van	35.6%	24.6%	21.8%	12.3%	7.7%	6.5%	10.0%
Taxi/ limo	23.2%	24.6%	21.0%	20.5%	8.6%	17.6%	11.6%
Rental car	44.8%	51.9%	46.9%	54.8%	66.9%	57.3%	51.2%
Ride share	NA	14.7%	14.4%	15.1%	33.2%	43.2%	35.3%
Car share	NA	NA	NA	NA	5.2%	1.8%	2.9%
Bicycle rental	NA	3.2%	2.4%	1.4%	2.9%	2.4%	3.1%

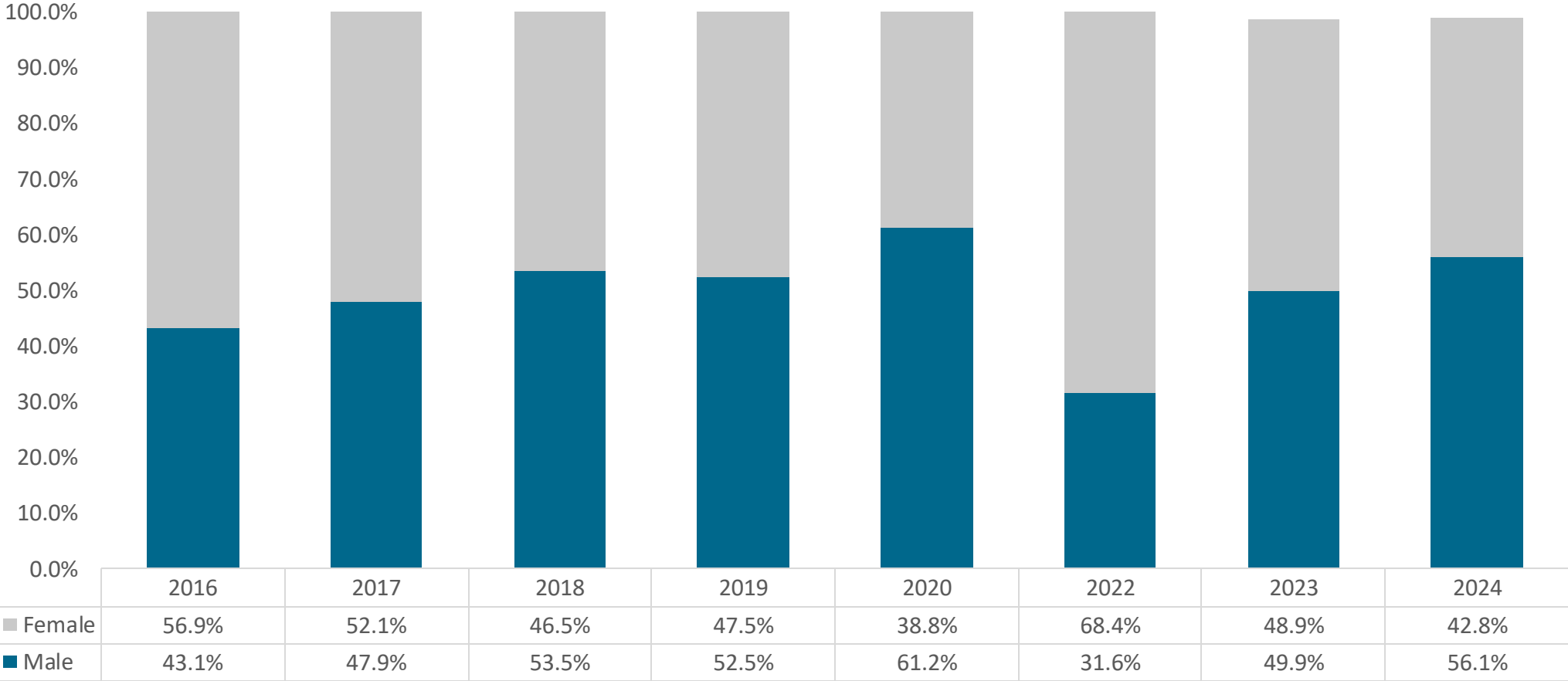
ACTIVITIES - OTHER - CHINA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	19.7%	10.2%	0.0%	0.0%	7.9%	10.0%
Visiting friends/ relatives	18.0%	10.2%	0.0%	0.0%	7.9%	10.0%
Giving back to the local community	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%

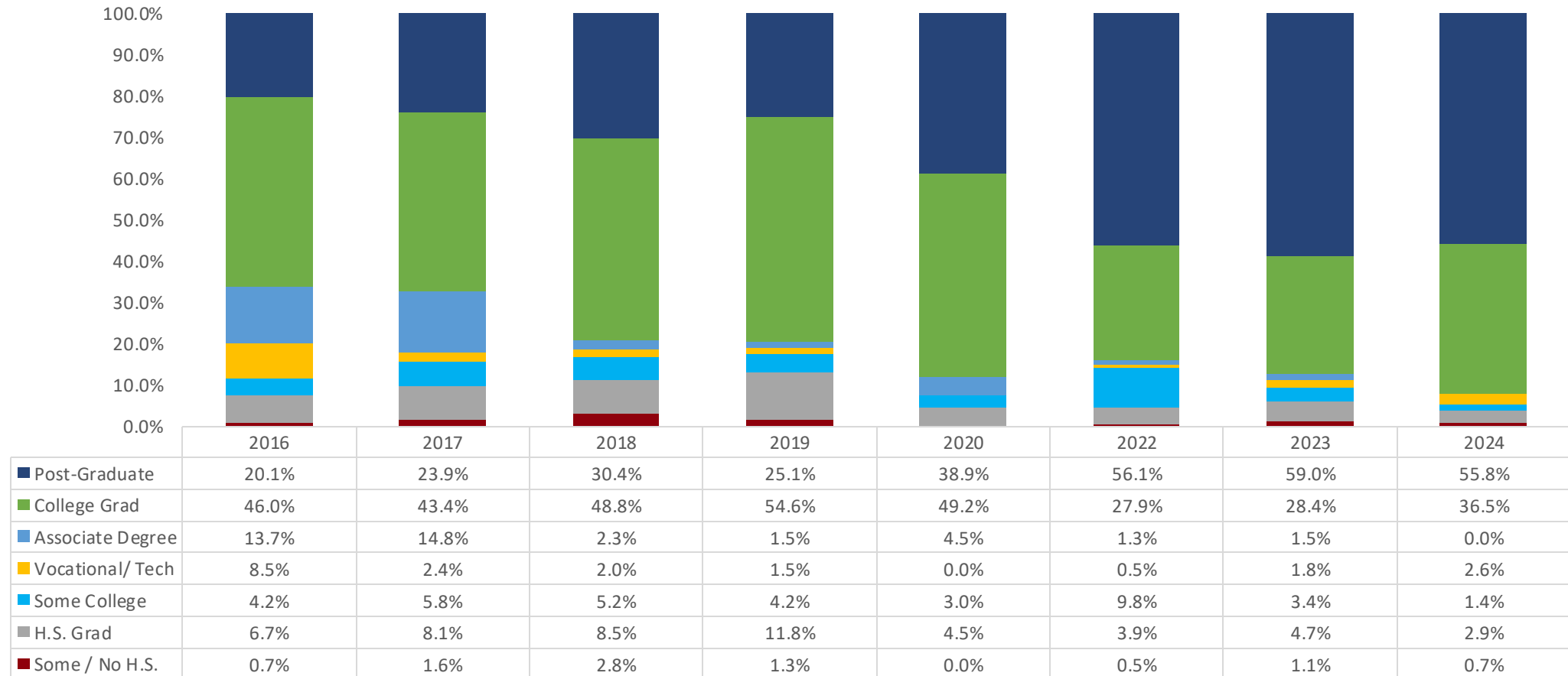
ACTIVITIES - OTHER - CHINA

	2018	2019	2020	2022	2023	2024
TOTAL	19.6%	19.0%	15.1%	15.0%	15.3%	16.7%
Visiting friends/ relatives	17.7%	16.9%	15.1%	10.2%	14.1%	15.5%
Giving back to the local community	2.5%	2.8%	0.0%	5.4%	2.9%	2.4%

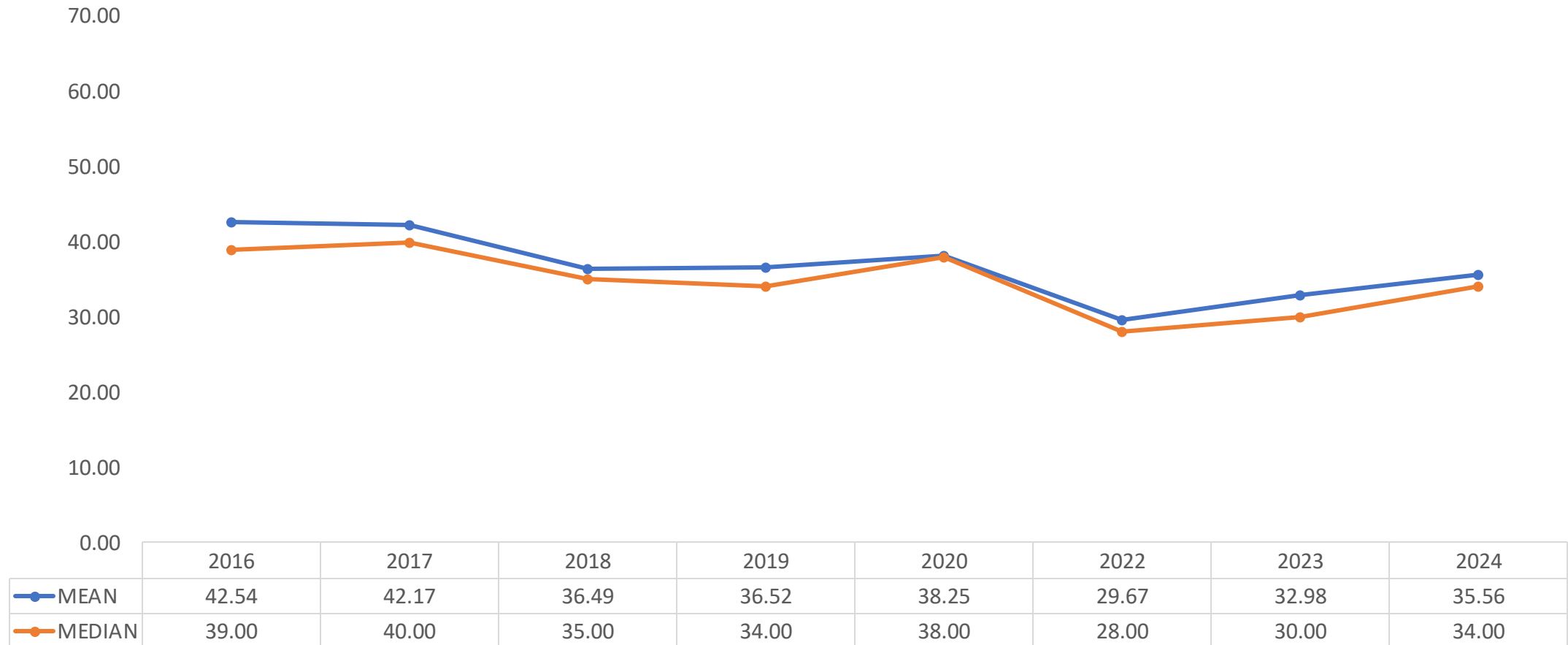
VISITOR PROFILE - GENDER - CHINA



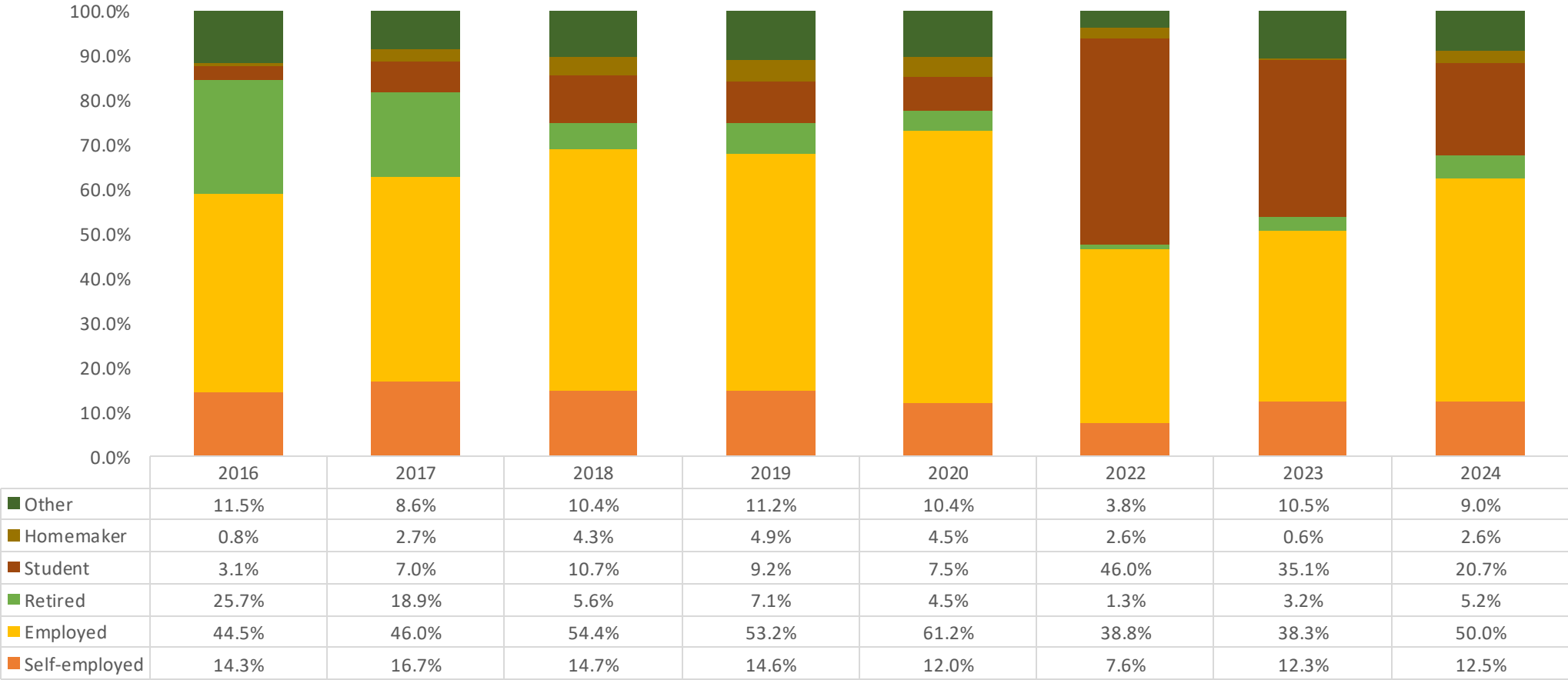
VISITOR PROFILE - EDUCATION - CHINA



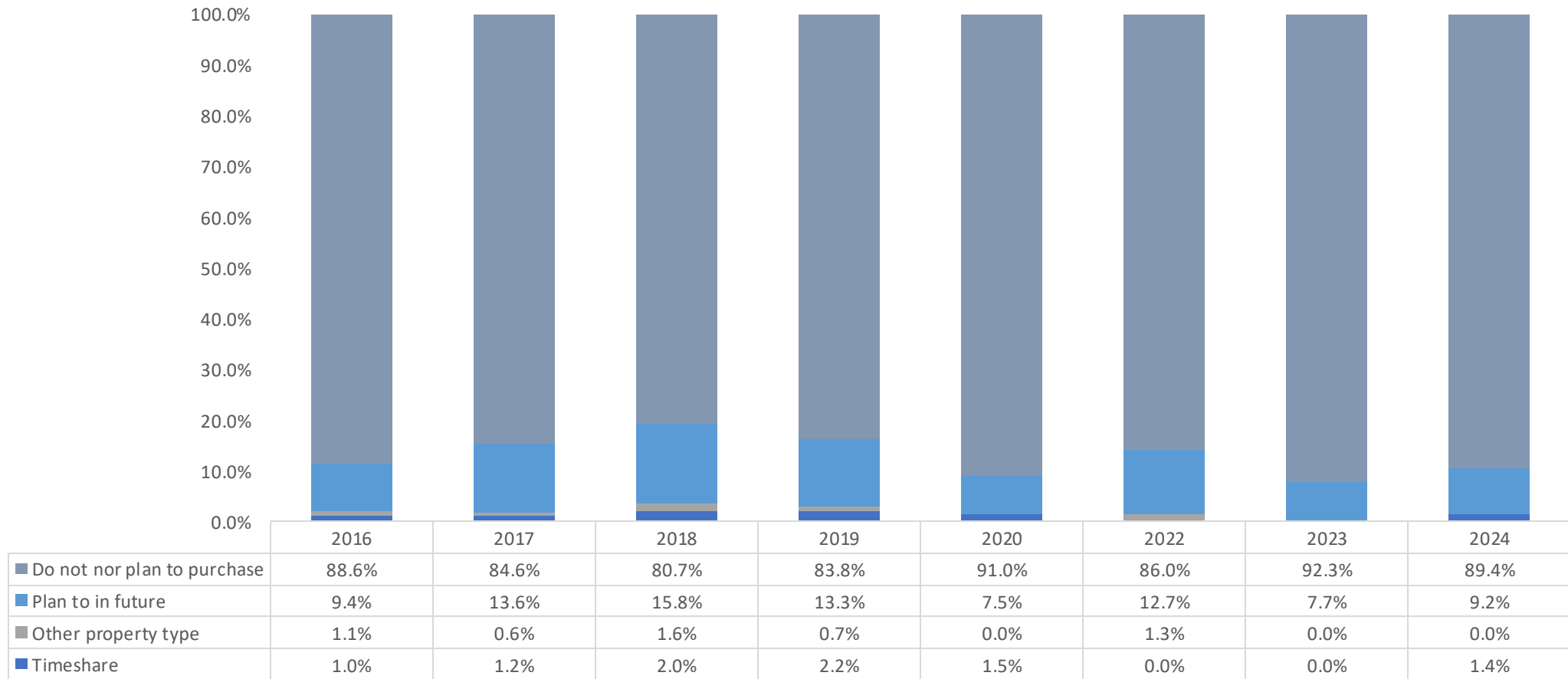
VISITOR PROFILE - AGE - CHINA



VISITOR PROFILE - EMPLOYMENT STATUS - CHINA



VISITOR PROFILE - HAWAI'I PROPERTY OWNER - CHINA



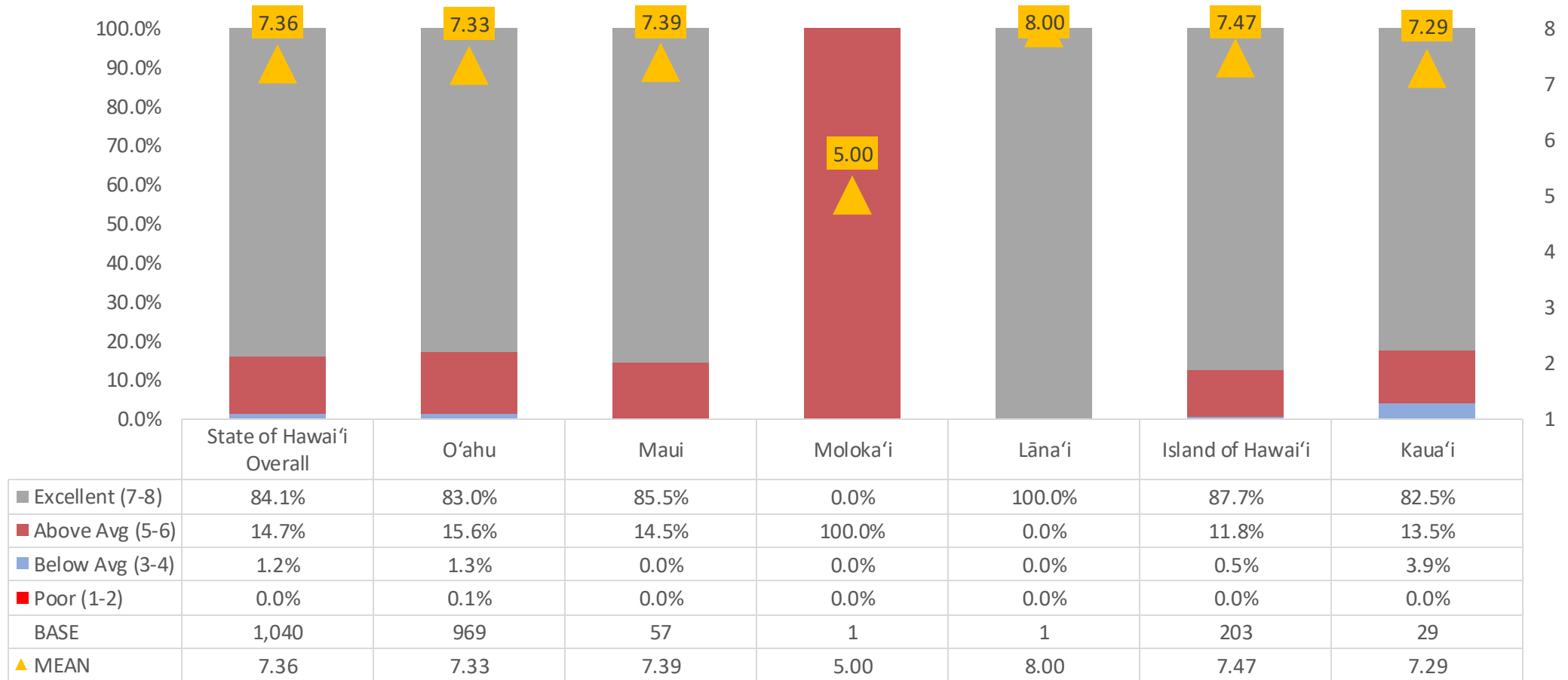
VISITOR PROFILE - HOUSEHOLD INCOME - CHINESE YUAN

	2018	2019	2020	2022	2023	2024
< ¥250,799	30.4%	33.1%	13.8%	9.9%	16.3%	7.7%
¥250,800 - ¥376,099	23.0%	23.1%	24.6%	23.4%	16.3%	21.3%
¥376,100 - ¥501,399	15.4%	15.5%	13.9%	14.0%	8.1%	9.2%
¥501,400 - ¥626,799	8.0%	7.7%	9.2%	4.2%	4.4%	11.2%
¥626,800 - ¥783,499	5.4%	4.4%	12.3%	7.0%	10.2%	4.8%
¥783,500 - ¥940,199	6.3%	5.6%	7.7%	12.1%	8.6%	8.8%
¥940,200 - ¥1,096,899	2.8%	2.8%	4.6%	5.7%	4.6%	7.4%
¥1,096,900 - ¥1,253,599	3.2%	2.2%	0.0%	3.6%	9.3%	5.1%
¥1,253,600 - ¥1,560,799	1.8%	1.5%	4.6%	2.9%	2.5%	5.9%
¥1,560,800+	3.7%	4.3%	9.2%	17.3%	19.7%	18.7%

Section 19 – Korea

OVERALL SATISFACTION - MOST RECENT TRIP - KOREA

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



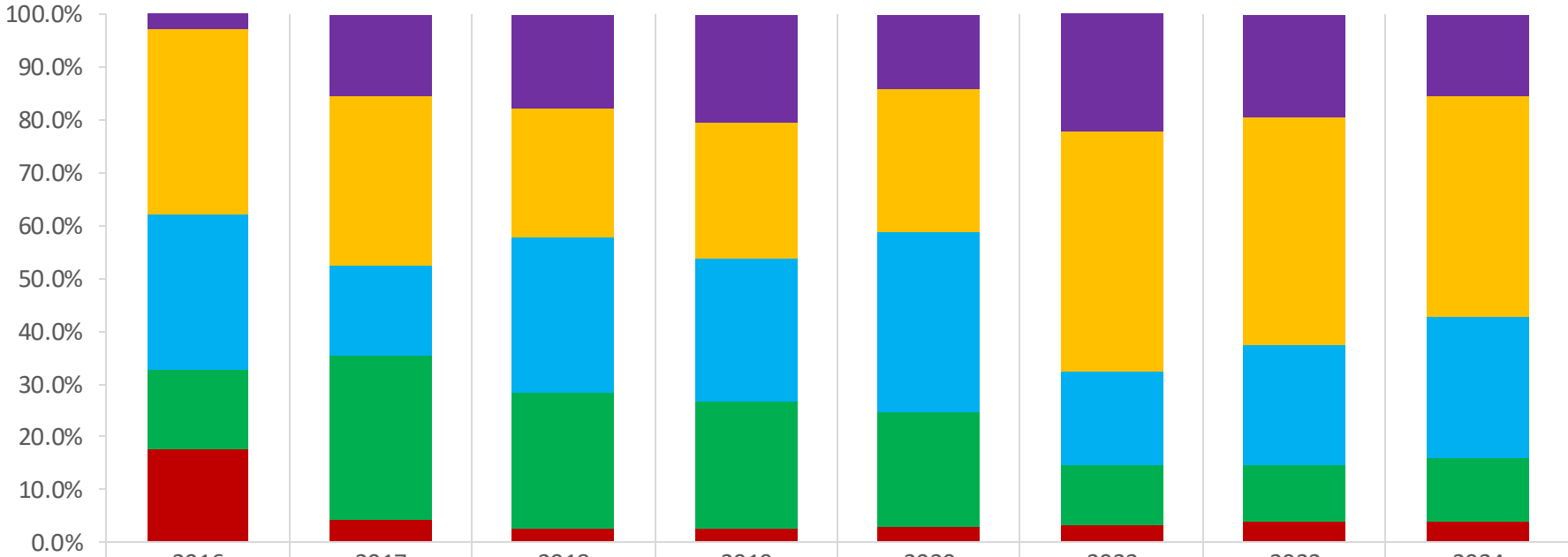
PRIMARY PURPOSE OF TRIP - KOREA

	2018	2019	2020	2022	2023	2024
Vacation	52.7%	52.3%	61.2%	31.0%	38.6%	49.9%
Honeymoon	28.9%	32.8%	27.0%	53.5%	48.2%	33.3%
Other business trip/ work in Hawai'i	0.0%	0.0%	0.0%	3.1%	3.4%	5.7%
Visit friends/ relatives	3.1%	1.0%	2.3%	5.7%	2.8%	3.4%
Convention/ conference	2.0%	1.1%	2.0%	1.8%	1.6%	2.3%

PRIMARY + SECONDARY PURPOSE OF TRIP - KOREA

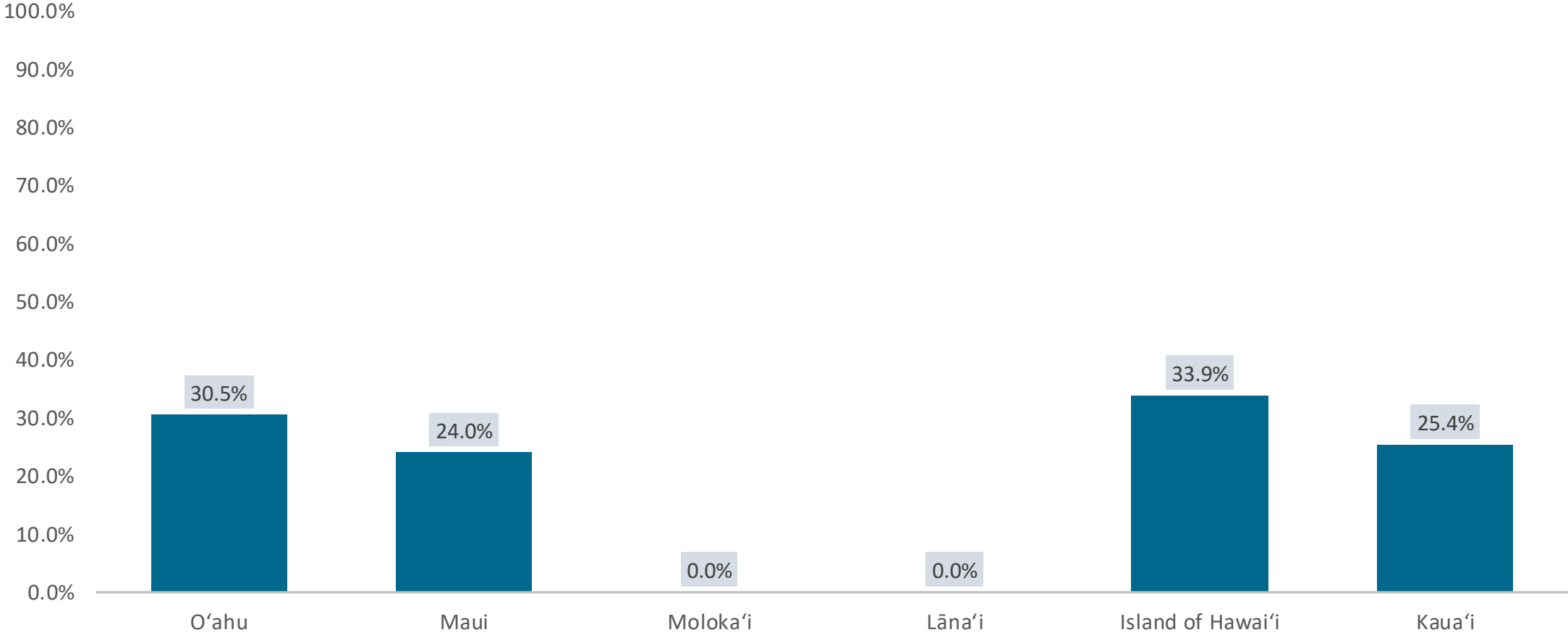
	2018	2019	2020	2022	2023	2024
Vacation	80.0%	77.5%	82.7%	69.2%	75.5%	78.0%
Honeymoon	31.6%	36.2%	28.0%	55.0%	49.0%	34.9%
Other business trip/ work in Hawai'i	2.7%	1.6%	0.3%	5.3%	4.9%	7.9%
Visit friends/ relatives	2.7%	2.5%	5.9%	9.6%	6.2%	7.8%
Incentive trip	6.9%	4.0%	2.3%	2.8%	3.1%	4.1%
Convention/ conference	2.7%	1.4%	2.0%	2.8%	2.4%	4.1%
To get married	5.8%	7.6%	1.4%	7.7%	3.7%	3.3%

VACATION TRIP DESCRIPTION - KOREA

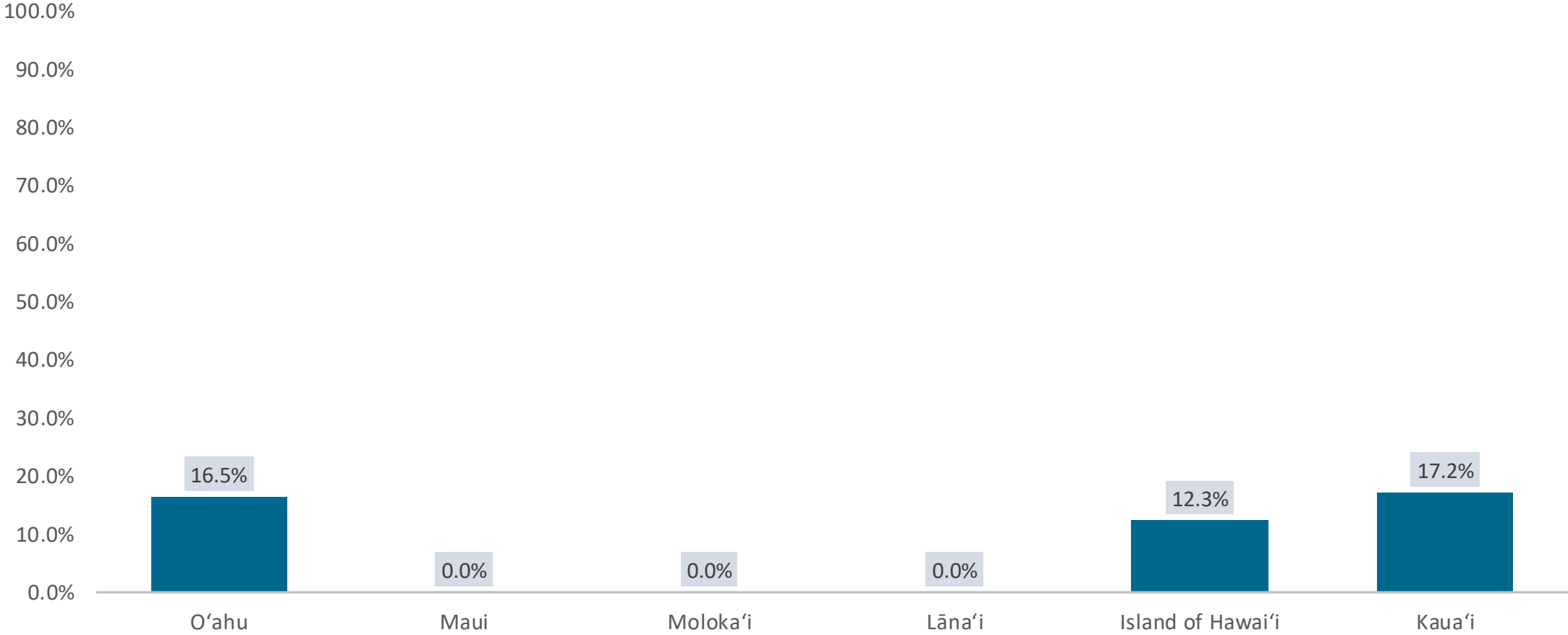


	2016	2017	2018	2019	2020	2022	2023	2024
Once-in-a-lifetime	2.9%	15.5%	17.9%	20.6%	14.0%	22.4%	19.5%	15.4%
Special occasion	35.0%	32.1%	24.4%	25.7%	27.1%	45.5%	43.0%	41.9%
More special than most trips	29.5%	17.2%	29.4%	27.0%	34.3%	17.5%	23.0%	26.6%
Annual/ Semi-annual trip	15.1%	30.9%	25.6%	24.2%	21.7%	11.6%	10.7%	12.0%
Other	17.6%	4.3%	2.7%	2.5%	2.9%	3.1%	3.8%	4.1%

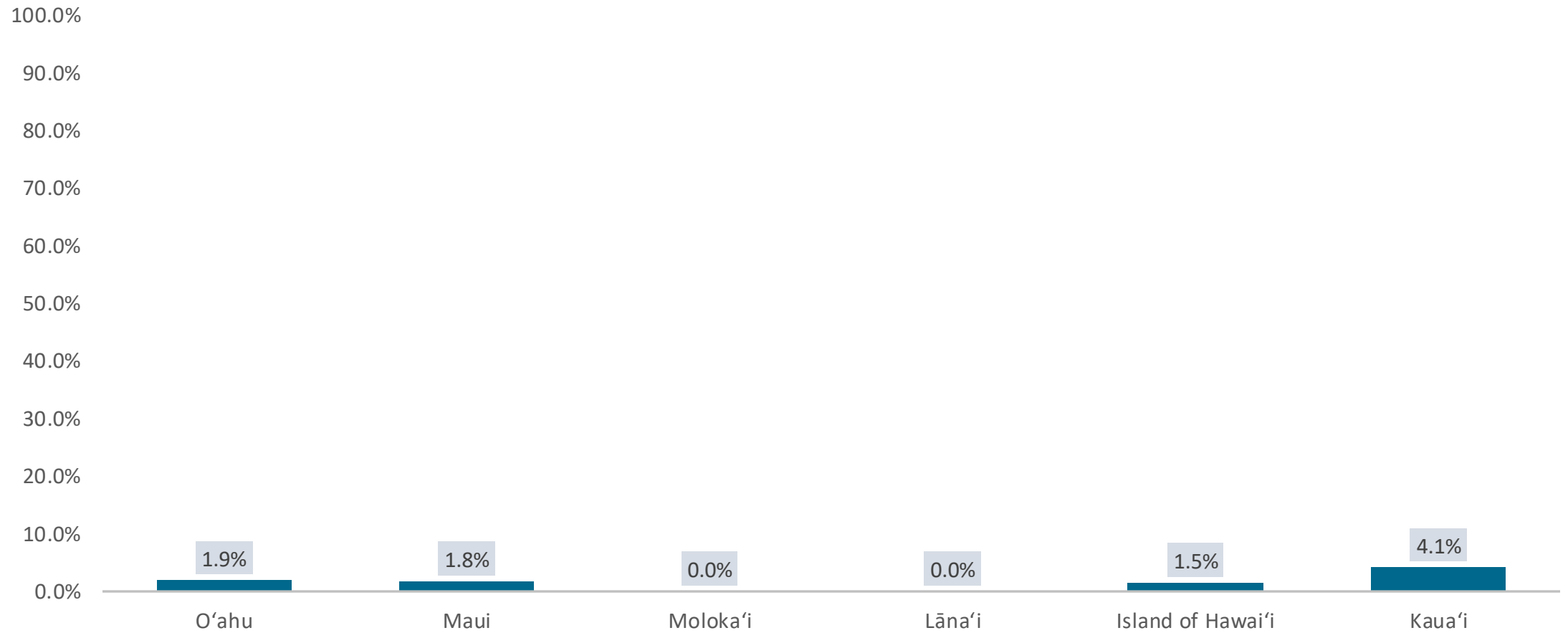
ADVERTISING AWARENESS - KOREA



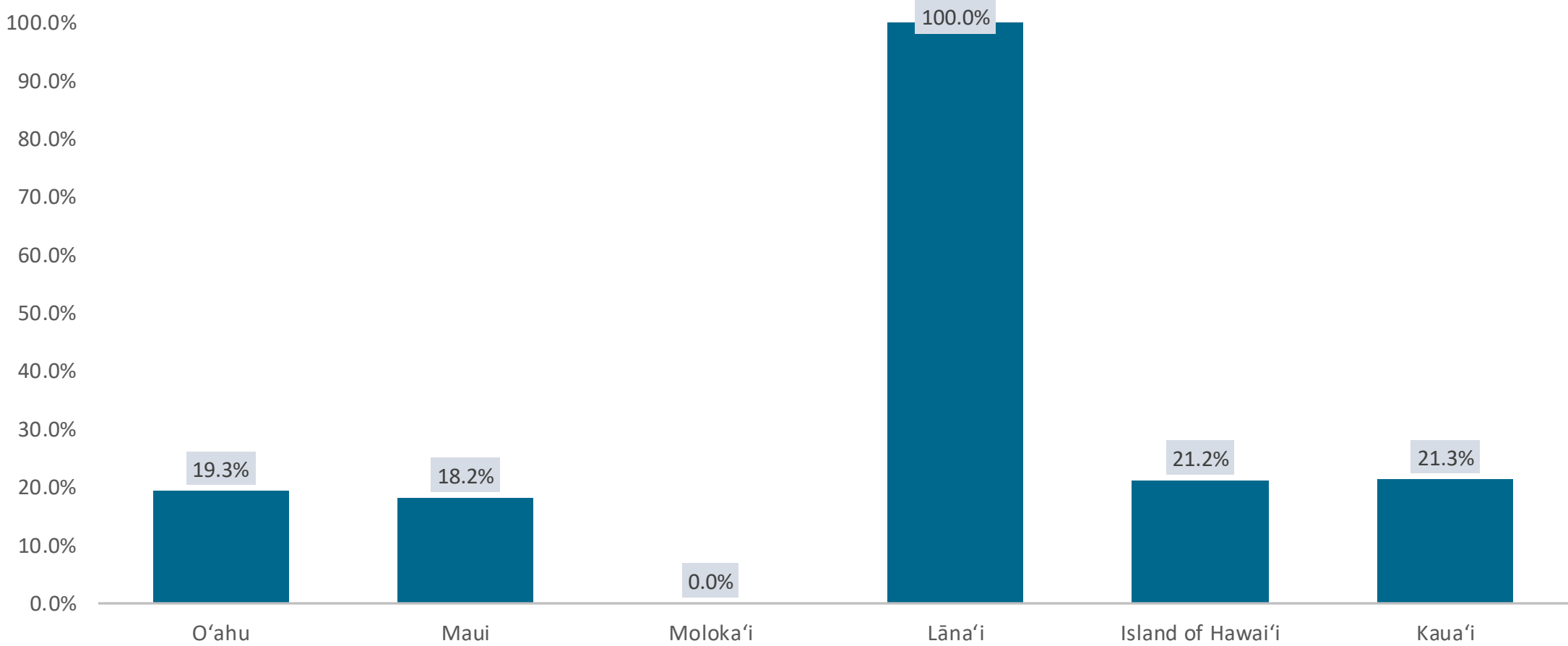
IMPACT OF LOCATION FILMING - KOREA



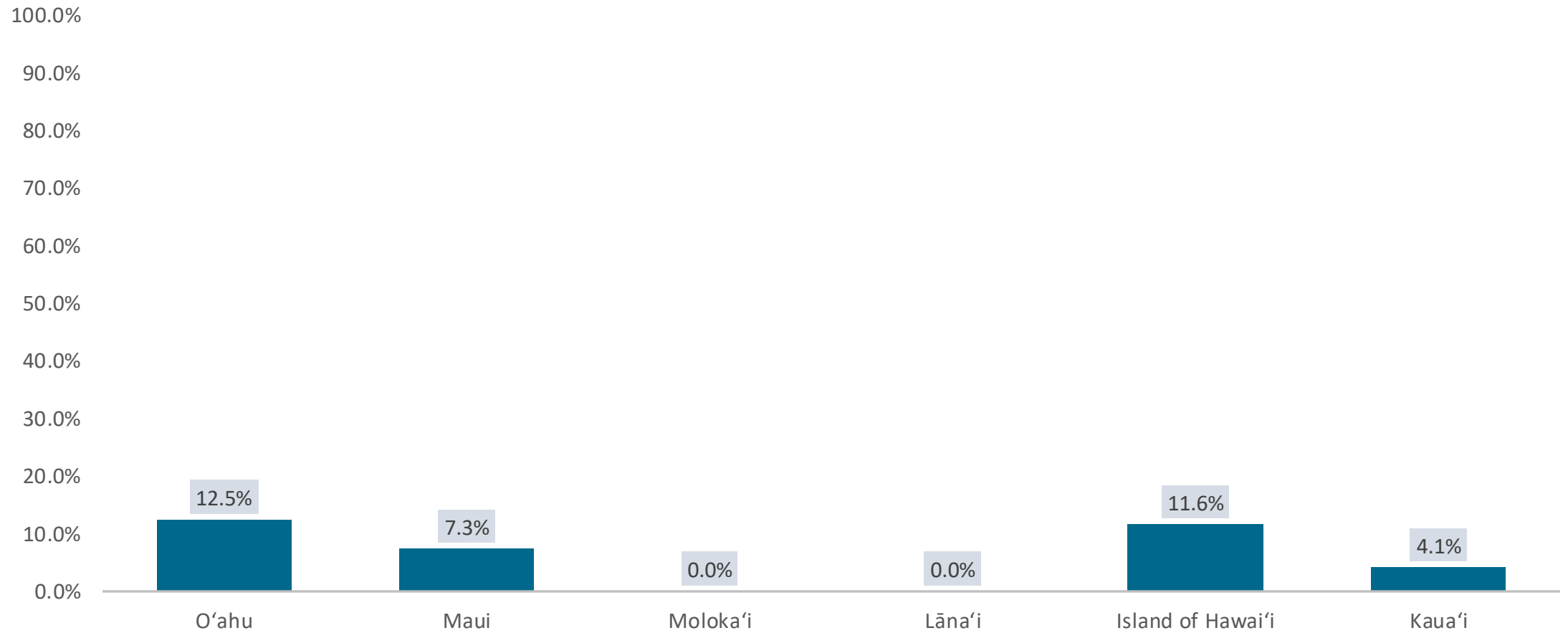
IMPACT OF HAWAIIAN MUSIC - KOREA



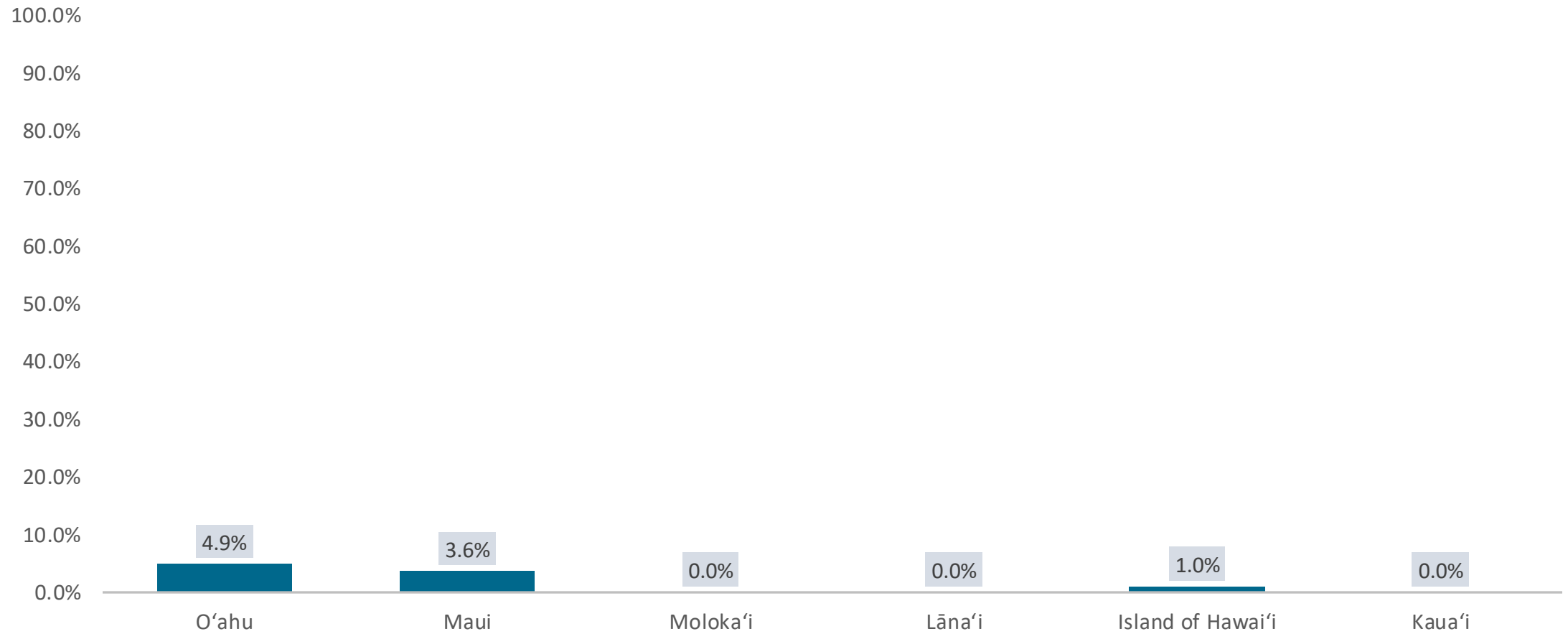
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - KOREA



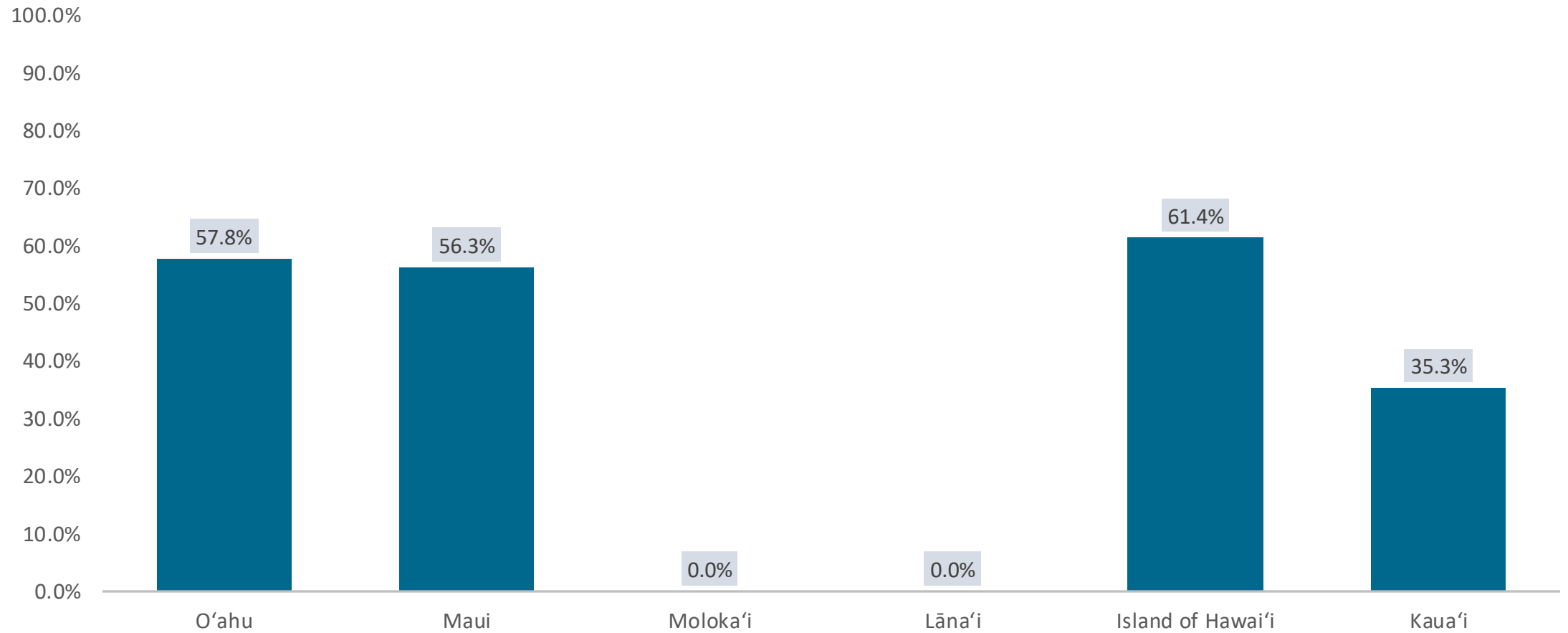
IMPACT OF OUTDOOR/ SPORTING EVENTS - KOREA



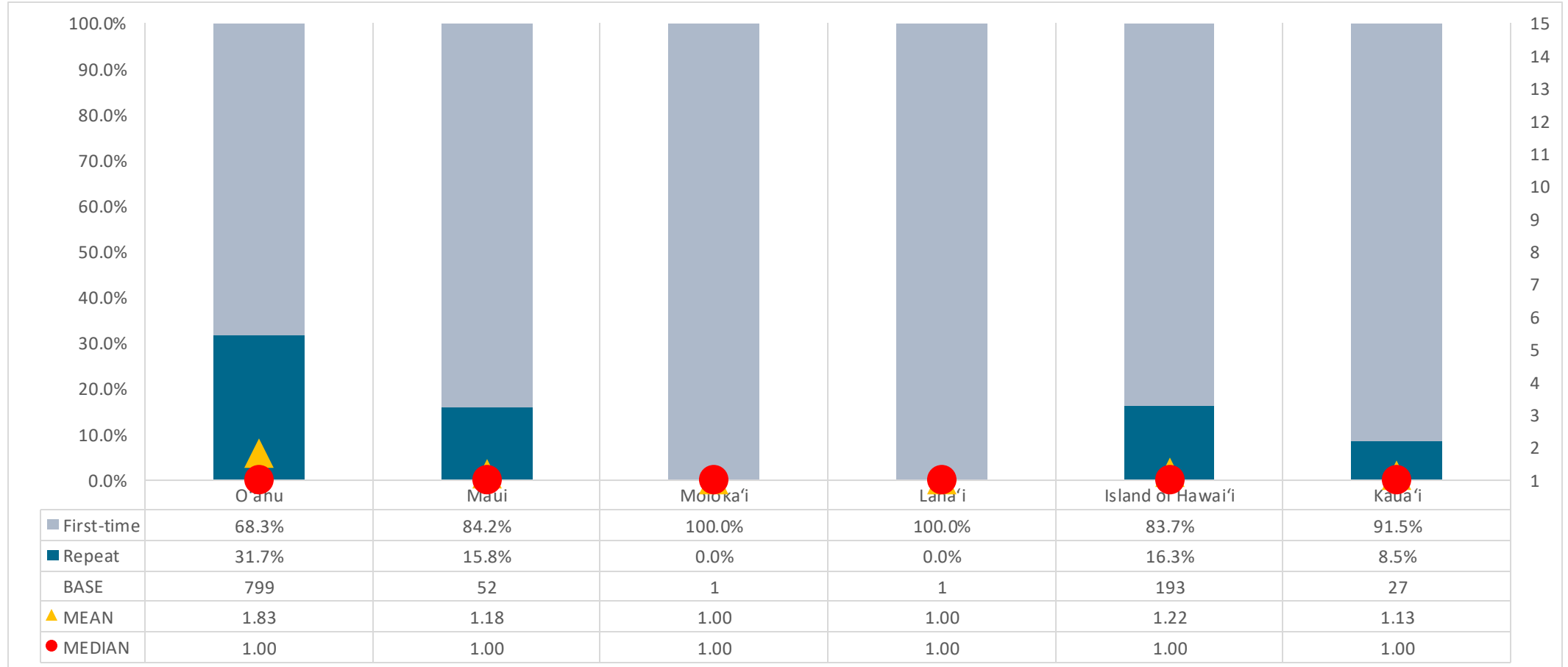
IMPACT OF HAWAIIAN CULTURAL EVENTS - KOREA



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - KOREA



1ST TIME VS REPEAT VISITORS - KOREA

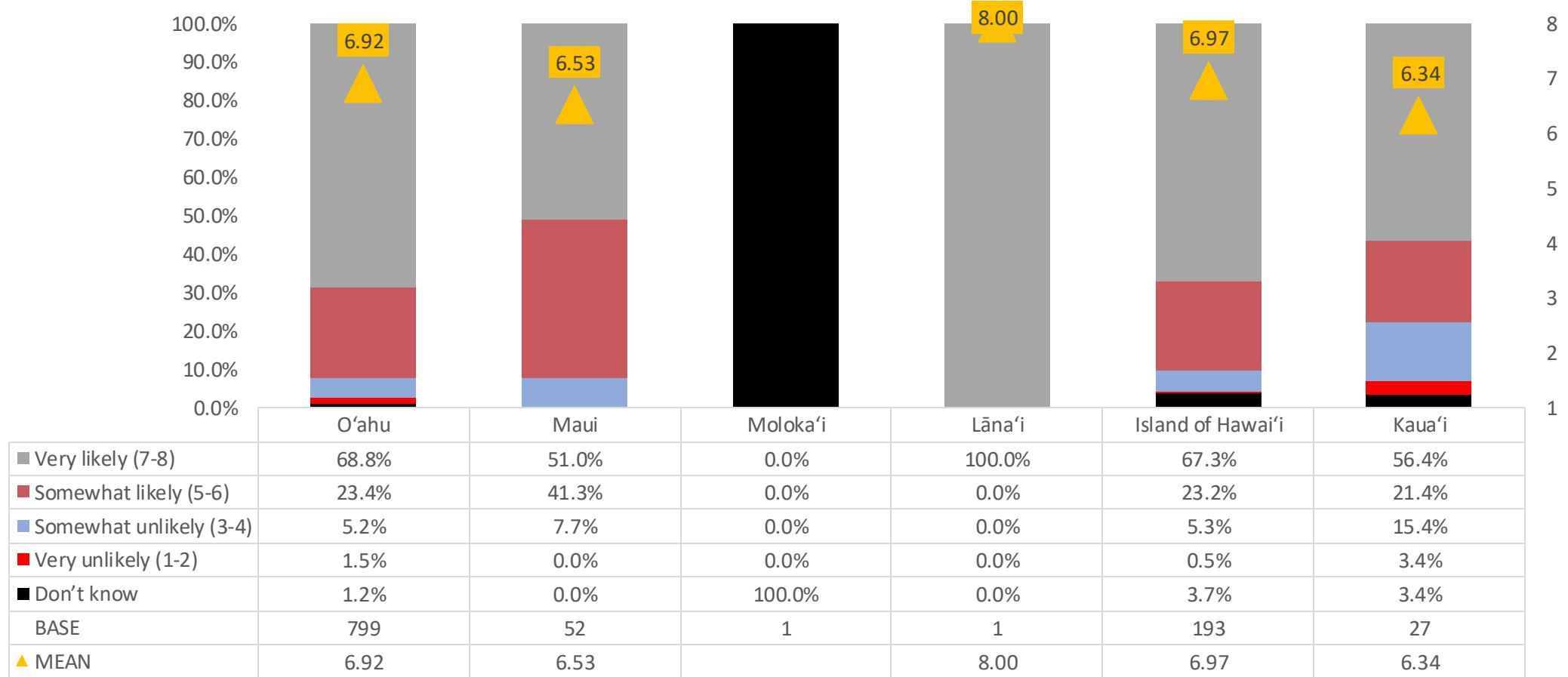


TRAVEL PARTY MEMBERS – KOREA

	2016	2017	2018	2019	2020	2022	2023	2024
My spouse	65.0%	68.7%	62.0%	66.6%	56.2%	72.1%	71.7%	65.2%
Other adult members of my family	18.2%	17.2%	16.4%	20.8%	34.3%	12.0%	16.9%	19.8%
My child(ren)/ grandchild(ren) under 18	11.6%	17.4%	14.6%	13.3%	18.7%	8.1%	16.4%	18.7%
My friends/ associates	13.8%	12.2%	14.2%	11.2%	9.8%	10.1%	7.7%	12.7%
Myself only (traveled alone/ no one else)	4.5%	4.7%	3.1%	3.4%	4.6%	5.4%	5.7%	6.6%
My girlfriend/ boyfriend	3.5%	2.5%	7.4%	2.1%	0.3%	3.9%	1.6%	1.8%
Same-gender partner	0.3%	0.3%	0.2%	0.0%	0.0%	0.2%	0.1%	0.2%

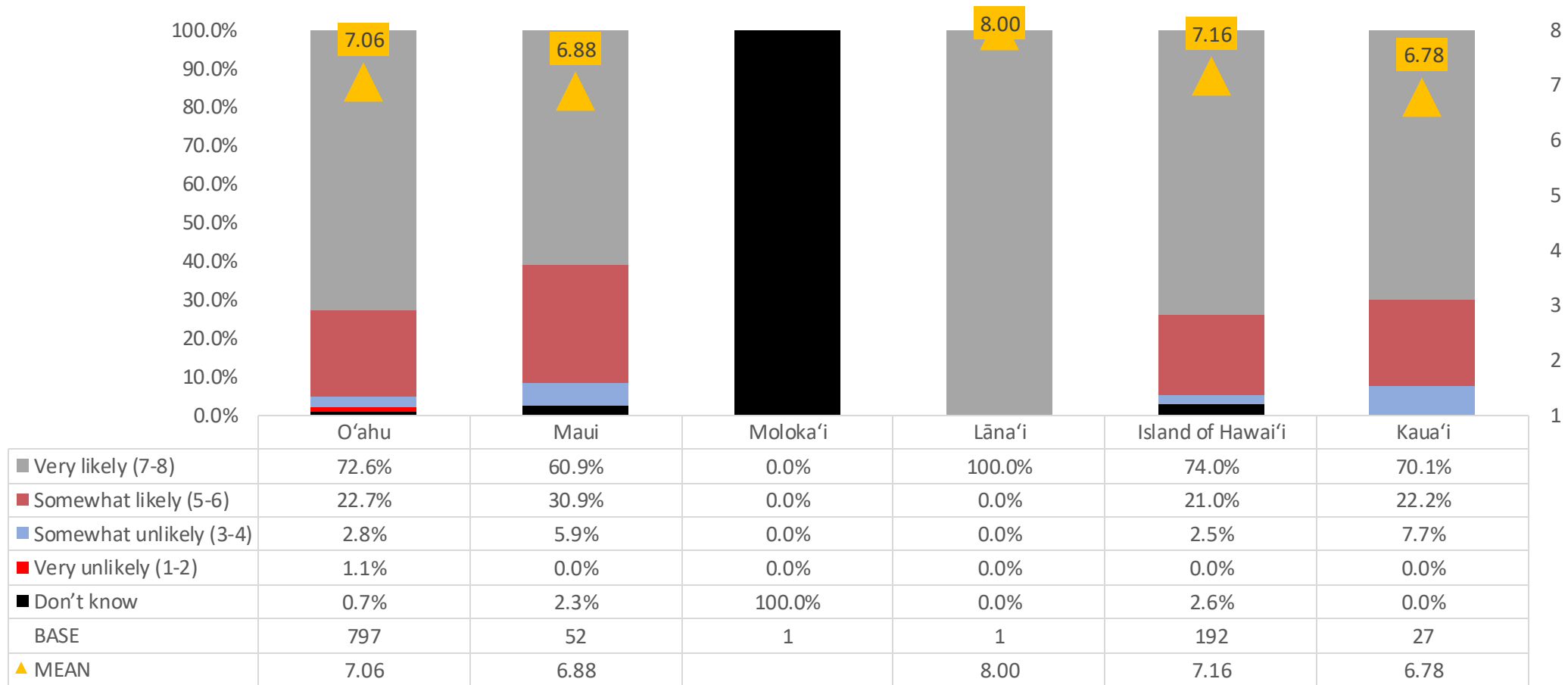
LIKELIHOOD OF RETURN VISIT - KOREA

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



BRAND/ DESTINATION ADVOCACY - KOREA

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



ACTIVITIES - SIGHTSEEING - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.8%	100.0%	100.0%	100.0%	100.0%	100.0%
On own (self-guided)/ driving around the island	81.8%	79.1%	100.0%	0.0%	81.8%	61.4%
Helicopter ride/ airplane tour	4.1%	3.6%	0.0%	0.0%	7.0%	11.1%
Boat tour/ submarine ride/ whale watching	32.0%	22.7%	0.0%	0.0%	30.5%	15.4%
Visiting towns/ communities	38.2%	25.0%	0.0%	0.0%	37.9%	23.0%
Private limousine/ van tour/ tour bus	12.2%	6.3%	0.0%	0.0%	12.8%	24.0%
Scenic views/ natural landmarks	61.2%	50.0%	0.0%	100.0%	69.1%	59.8%
Movie and TV filming location tours	25.8%	7.3%	0.0%	0.0%	17.1%	14.5%

ACTIVITIES – SIGHTSEEING – KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.6%	95.6%	97.3%	97.4%	98.7%	99.8%	99.1%
On own (self-guided)/ driving around the island	72.7%	76.9%	76.0%	77.7%	73.6%	80.8%	81.8%
Helicopter ride/ airplane tour	8.2%	5.4%	3.8%	2.3%	9.2%	4.5%	4.8%
Boat tour/ submarine ride/ whale watching	13.4%	16.2%	16.9%	20.3%	31.1%	30.8%	31.5%
Visiting towns/ communities	14.4%	35.3%	34.9%	36.4%	42.1%	37.7%	37.4%
Private limousine/ van tour/ tour bus	20.3%	15.3%	15.8%	18.3%	9.7%	10.8%	12.1%
Scenic views/ natural landmarks	53.1%	53.3%	53.3%	61.0%	58.2%	61.4%	62.0%
Movie and TV filming location tours	13.0%	12.8%	16.1%	21.9%	21.7%	20.6%	23.2%

ACTIVITIES – RECREATION – KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	98.3%	94.5%	100.0%	100.0%	98.0%	93.1%
Beach/ sunbathing	86.8%	77.3%	0.0%	100.0%	82.7%	64.1%
Bodyboarding	3.5%	0.0%	0.0%	0.0%	5.2%	0.0%
Stand-up paddle boarding	4.3%	0.0%	0.0%	0.0%	4.0%	4.3%
Surfing	12.2%	8.2%	0.0%	0.0%	11.3%	4.3%
Canoe paddling	3.1%	2.3%	0.0%	0.0%	3.2%	0.0%
Kayaking	4.7%	0.0%	0.0%	0.0%	2.5%	7.7%
Swimming in the ocean	53.8%	40.0%	100.0%	100.0%	55.3%	23.9%
Snorkeling	53.4%	35.9%	0.0%	100.0%	59.0%	22.2%
Freediving	1.4%	1.8%	0.0%	0.0%	0.5%	3.4%
Windsurfing/ kitesurfing	0.6%	0.0%	0.0%	0.0%	0.6%	4.3%
Jet skiing/parasailing	1.9%	0.0%	0.0%	0.0%	2.1%	3.4%
Scuba diving	1.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Fishing	0.8%	0.0%	0.0%	0.0%	0.6%	0.0%
Golf	4.5%	7.7%	0.0%	0.0%	10.4%	8.5%

ACTIVITIES – RECREATION – KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	94.7%	97.9%	98.4%	99.0%	96.1%	98.2%	98.0%
Beach/ sunbathing	71.8%	78.5%	75.2%	82.3%	74.1%	82.3%	85.2%
Bodyboarding	9.5%	6.7%	7.0%	2.0%	5.5%	3.0%	3.7%
Stand-up paddle boarding	*	*	*	6.2%	8.7%	5.6%	4.1%
Surfing	11.6%	10.7%	12.3%	9.2%	17.3%	12.7%	11.7%
Canoe paddling	6.1%	4.7%	5.8%	3.3%	6.3%	4.9%	3.1%
Kayaking	**	**	**	**	**	**	4.3%
Swimming in the ocean	NA	49.0%	45.3%	49.2%	53.8%	53.5%	52.9%
Snorkeling	NA	45.4%	45.5%	44.8%	46.7%	55.7%	53.1%
Freediving	NA	NA	NA	1.3%	4.2%	1.3%	1.3%
Windsurfing/ kitesurfing	1.0%	1.3%	0.7%	0.3%	0.8%	0.2%	0.7%
Jet skiing/ parasailing	7.7%	5.7%	5.2%	4.9%	4.1%	2.8%	1.9%
Scuba diving	3.9%	3.9%	3.5%	2.3%	2.7%	1.6%	1.0%
Fishing	2.2%	1.6%	1.5%	1.3%	2.3%	0.5%	0.7%
Golf	3.5%	3.6%	3.0%	7.3%	3.5%	5.0%	5.8%

*Combined with bodyboarding

**Combined with canoe paddling

ACTIVITIES - RECREATION - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.3%	94.5%	100.0%	100.0%	98.0%	93.1%
Running/ jogging/ fitness walking	20.5%	15.5%	0.0%	100.0%	14.4%	11.9%
Cycling	2.2%	0.0%	0.0%	0.0%	0.5%	8.5%
Spa	6.5%	4.1%	0.0%	100.0%	6.2%	4.3%
Hiking	23.4%	19.1%	0.0%	0.0%	26.8%	25.7%
Backpacking/ camping	1.0%	1.8%	0.0%	0.0%	3.4%	0.0%
Agritourism	18.8%	7.7%	0.0%	0.0%	19.5%	24.8%
Sports event or tournament	1.3%	1.8%	0.0%	0.0%	0.0%	0.0%
Parks/ botanical gardens	26.0%	11.4%	0.0%	0.0%	23.2%	30.7%
Waterparks	2.8%	4.1%	0.0%	0.0%	2.1%	0.0%
Mountain tubing/ waterfall rappel	0.5%	0.0%	0.0%	0.0%	2.6%	0.0%
Zip-lining	0.5%	2.3%	0.0%	0.0%	1.5%	0.0%
Skydiving	1.6%	0.0%	0.0%	0.0%	0.5%	0.0%
All-terrain vehicle (ATV)	10.7%	1.8%	0.0%	0.0%	7.0%	0.0%
Horseback riding	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%

ACTIVITIES – RECREATION – KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	94.7%	97.9%	98.4%	99.0%	96.1%	98.2%	98.0%
Running/ jogging/ fitness walking	6.8%	8.7%	9.2%	11.8%	16.6%	13.3%	19.3%
Cycling	NA	NA	NA	NA	1.4%	2.8%	2.0%
Spa	6.4%	6.0%	7.7%	3.6%	9.3%	6.2%	6.6%
Hiking	13.9%	13.5%	21.6%	25.3%	22.9%	24.5%	24.2%
Backpacking/ camping	*	*	1.8%	0.7%	3.1%	2.3%	1.5%
Agritourism	18.8%	19.3%	21.3%	26.6%	15.1%	17.2%	18.6%
Sports event or tournament	2.3%	2.1%	1.5%	1.6%	0.7%	1.0%	1.1%
Parks/ botanical gardens	23.6%	25.3%	24.9%	26.6%	22.8%	21.1%	25.2%
Waterparks	NA	3.9%	2.9%	3.6%	6.5%	4.2%	2.8%
Mountain tubing/ waterfall rappel	NA	1.4%	0.8%	1.6%	1.8%	1.1%	0.9%
Zip-lining	NA	1.6%	1.2%	1.6%	1.6%	1.2%	0.8%
Skydiving	NA	3.5%	2.9%	1.6%	5.1%	1.6%	1.4%
All-terrain vehicle (ATV)	NA	6.6%	10.8%	9.8%	10.5%	9.1%	9.5%
Horseback riding	NA	3.4%	1.0%	1.6%	6.3%	0.4%	0.8%

* Combined with hiking

ACTIVITIES - ENTERTAINMENT & DINING - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	99.4%	98.2%	100.0%	100.0%	99.0%	86.3%
Lunch/ sunset/ dinner/ evening cruise	33.1%	38.6%	0.0%	0.0%	37.4%	28.3%
Live music/ stage show	17.0%	9.5%	0.0%	0.0%	13.1%	11.9%
Nightclub/ dancing/ bar/ karaoke	3.1%	0.0%	0.0%	0.0%	3.1%	0.0%
Fine dining	52.6%	28.2%	100.0%	100.0%	47.7%	6.9%
Family restaurant	47.7%	18.1%	100.0%	0.0%	37.7%	8.5%
Fast food	60.5%	40.5%	0.0%	0.0%	54.8%	20.4%
Food truck	64.7%	45.9%	0.0%	0.0%	55.8%	34.2%
Café/ coffee house	68.1%	47.7%	0.0%	0.0%	62.9%	42.7%
Ethnic dining	26.6%	15.0%	0.0%	0.0%	23.7%	22.2%
Farm-to-table cuisine	2.6%	5.5%	100.0%	0.0%	2.5%	0.0%
Prepared own meal	14.8%	17.7%	0.0%	0.0%	27.1%	32.4%

ACTIVITIES - ENTERTAINMENT & DINING - KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.5%	98.8%	98.0%	98.7%	97.7%	98.7%	99.0%
Lunch/ sunset/ dinner/ evening cruise	47.5%	37.0%	35.8%	35.7%	44.7%	33.9%	34.4%
Live music/ stage show	15.3%	15.1%	14.5%	14.4%	20.2%	13.8%	16.3%
Nightclub/ dancing/ bar/ karaoke	6.4%	9.0%	4.0%	4.9%	3.8%	3.2%	2.8%
Fine dining	49.7%	55.2%	48.3%	44.6%	51.4%	53.0%	49.9%
Family restaurant	50.0%	37.6%	37.0%	47.9%	37.2%	44.3%	44.0%
Fast food	54.8%	50.2%	57.4%	62.6%	49.8%	57.2%	57.9%
Food truck	NA	47.5%	52.1%	60.0%	52.8%	64.9%	61.7%
Café/ coffee house	48.6%	54.4%	56.0%	59.7%	57.8%	66.5%	65.6%
Ethnic dining	25.6%	24.6%	26.3%	25.0%	26.6%	23.9%	26.1%
Farm-to-table cuisine	NA	NA	NA	NA	3.5%	2.9%	2.9%
Prepared own meal	16.3%	11.3%	13.8%	21.3%	10.1%	14.1%	17.5%

ACTIVITIES - SHOPPING - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.3%	94.5%	100.0%	0.0%	96.4%	82.8%
Malls/ department stores	84.5%	60.0%	0.0%	0.0%	70.5%	26.5%
Designer boutiques	4.3%	0.0%	0.0%	0.0%	6.1%	0.0%
Hotel/ resort stores	35.4%	13.6%	100.0%	0.0%	28.9%	4.3%
Swap meet/ flea market	3.4%	0.0%	0.0%	0.0%	5.2%	0.0%
Discount/ outlet stores	60.7%	32.7%	0.0%	0.0%	52.7%	18.8%
Supermarkets	47.9%	44.5%	0.0%	0.0%	51.5%	45.3%
Farmer's market	10.1%	20.0%	0.0%	0.0%	9.0%	7.7%
Convenience stores	61.1%	30.9%	0.0%	0.0%	55.9%	11.1%
Duty-free stores	39.2%	9.5%	100.0%	0.0%	30.8%	8.5%
Hawai'i-made products	31.1%	21.3%	100.0%	0.0%	25.5%	6.9%
Local shops and artisans	18.8%	7.7%	100.0%	0.0%	23.2%	27.3%
Local fashion designers	1.4%	0.0%	0.0%	0.0%	0.5%	0.0%

ACTIVITIES - SHOPPING - KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	97.7%	97.1%	97.4%	96.1%	95.8%	97.7%	97.4%
Malls/ department stores	77.8%	77.2%	76.7%	82.3%	73.8%	78.1%	79.9%
Designer boutiques	4.4%	4.6%	4.3%	5.9%	6.5%	4.7%	4.3%
Hotel/ resort stores	26.4%	30.2%	28.8%	24.9%	34.5%	34.1%	33.2%
Swap meet/ flea market	6.2%	3.6%	2.9%	3.0%	5.4%	3.3%	3.6%
Discount/ outlet stores	72.4%	61.6%	62.1%	63.3%	54.2%	60.2%	57.0%
Supermarkets	52.5%	57.1%	57.5%	63.9%	38.9%	46.6%	48.0%
Farmer's market	7.2%	10.3%	9.1%	12.2%	13.4%	12.8%	10.2%
Convenience stores	48.9%	43.3%	49.4%	61.0%	46.0%	55.7%	57.6%
Duty-free stores	40.1%	45.8%	43.7%	41.6%	37.0%	34.7%	35.9%
Hawai'i-made products	NA	NA	NA	NA	25.6%	27.6%	29.4%
Local shops and artisans	16.0%	14.7%	15.5%	19.7%	23.3%	20.4%	19.7%
Local fashion designers	NA	NA	NA	NA	NA	NA	1.2%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	65.6%	60.9%	100.0%	0.0%	67.5%	50.5%
Historic military sites and museums	23.0%	16.8%	0.0%	0.0%	21.9%	10.3%
Historic Hawaiian sites and museums	12.0%	6.3%	100.0%	0.0%	10.1%	22.2%
Other historical sites, museums, and homes	18.5%	13.6%	0.0%	0.0%	25.9%	6.9%
Art museums	5.1%	2.3%	0.0%	0.0%	4.7%	3.4%
Art galleries and exhibitions	2.5%	1.8%	0.0%	0.0%	0.5%	3.4%
Lū'au/ Polynesian show/ hula show	23.8%	18.1%	0.0%	0.0%	21.8%	0.0%
Lesson- e.g. ukulele, hula, canoe, lei making	5.2%	11.8%	0.0%	0.0%	4.6%	0.0%
Play/ concert/ theatre	3.1%	4.1%	0.0%	0.0%	3.0%	3.4%
Art/ craft fair	3.5%	3.6%	0.0%	0.0%	5.3%	11.1%
Festival/ events	4.0%	4.1%	0.0%	0.0%	4.4%	6.9%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	60.9%	66.4%	64.6%	66.2%	61.4%	62.1%	65.5%
Historic military sites and museums	18.0%	18.9%	15.5%	16.4%	20.8%	22.6%	22.3%
Historic Hawaiian sites and museums	NA	NA	NA	NA	13.1%	11.2%	12.0%
Other historical sites, museums, and homes	28.6%	28.6%	28.9%	25.6%	17.0%	18.1%	19.3%
Art museums	*	*	*	*	5.4%	3.2%	4.9%
Art galleries and exhibitions	*	*	*	*	1.2%	1.5%	2.2%
Lū'au/ Polynesian show/ hula show	24.1%	21.9%	22.6%	29.8%	18.1%	19.5%	22.6%
Lesson- e.g. ukulele, hula, canoe, lei making	2.9%	5.2%	5.4%	6.9%	2.8%	4.7%	5.4%
Play/ concert/ theatre	3.0%	4.7%	4.9%	4.6%	6.2%	2.2%	3.2%
Art/ craft fair	5.8%	5.9%	4.3%	4.6%	5.0%	3.8%	4.2%
Festival/ events	1.1%	2.7%	1.5%	1.6%	2.9%	4.1%	4.1%

* Combined Museum/ Art galleries as single option

ACTIVITIES - TRANSPORTATION - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	97.2%	94.5%	100.0%	100.0%	96.6%	95.7%
Airport shuttle	11.5%	3.6%	0.0%	100.0%	11.1%	4.3%
Trolley	23.7%	0.0%	0.0%	0.0%	21.4%	0.0%
Public bus	13.4%	7.3%	0.0%	0.0%	9.8%	0.0%
Tour bus/ tour van	26.4%	14.1%	0.0%	0.0%	26.2%	41.2%
Taxi/ limo	23.8%	14.1%	100.0%	0.0%	22.3%	0.0%
Rental car	54.1%	75.4%	0.0%	0.0%	61.3%	50.3%
Ride share	26.8%	9.5%	100.0%	0.0%	25.6%	4.3%
Care share	3.1%	1.8%	0.0%	0.0%	4.9%	0.0%
Bicycle rental	1.1%	0.0%	0.0%	0.0%	1.5%	0.0%

ACTIVITIES - TRANSPORTATION - KOREA

	2017	2018	2019	2020	2022	2023	2024
TOTAL	98.8%	95.5%	95.0%	98.0%	92.9%	97.7%	96.9%
Airport shuttle	18.8%	15.9%	16.2%	15.1%	14.3%	13.0%	11.1%
Trolley	30.2%	21.8%	23.4%	27.2%	17.5%	23.8%	21.6%
Public bus	15.5%	12.2%	11.3%	14.1%	13.1%	14.4%	11.9%
Tour bus/ tour van	35.0%	30.7%	33.4%	30.5%	22.9%	23.5%	26.1%
Taxi/ limo	21.5%	20.7%	21.3%	24.9%	16.1%	24.2%	22.6%
Rental car	61.1%	62.0%	54.6%	61.3%	55.8%	58.2%	56.5%
Ride share	NA	7.4%	12.0%	17.7%	21.6%	21.0%	25.4%
Car share	NA	NA	NA	NA	2.0%	2.3%	3.3%
Bicycle rental	NA	1.3%	1.3%	1.6%	3.2%	1.8%	1.2%

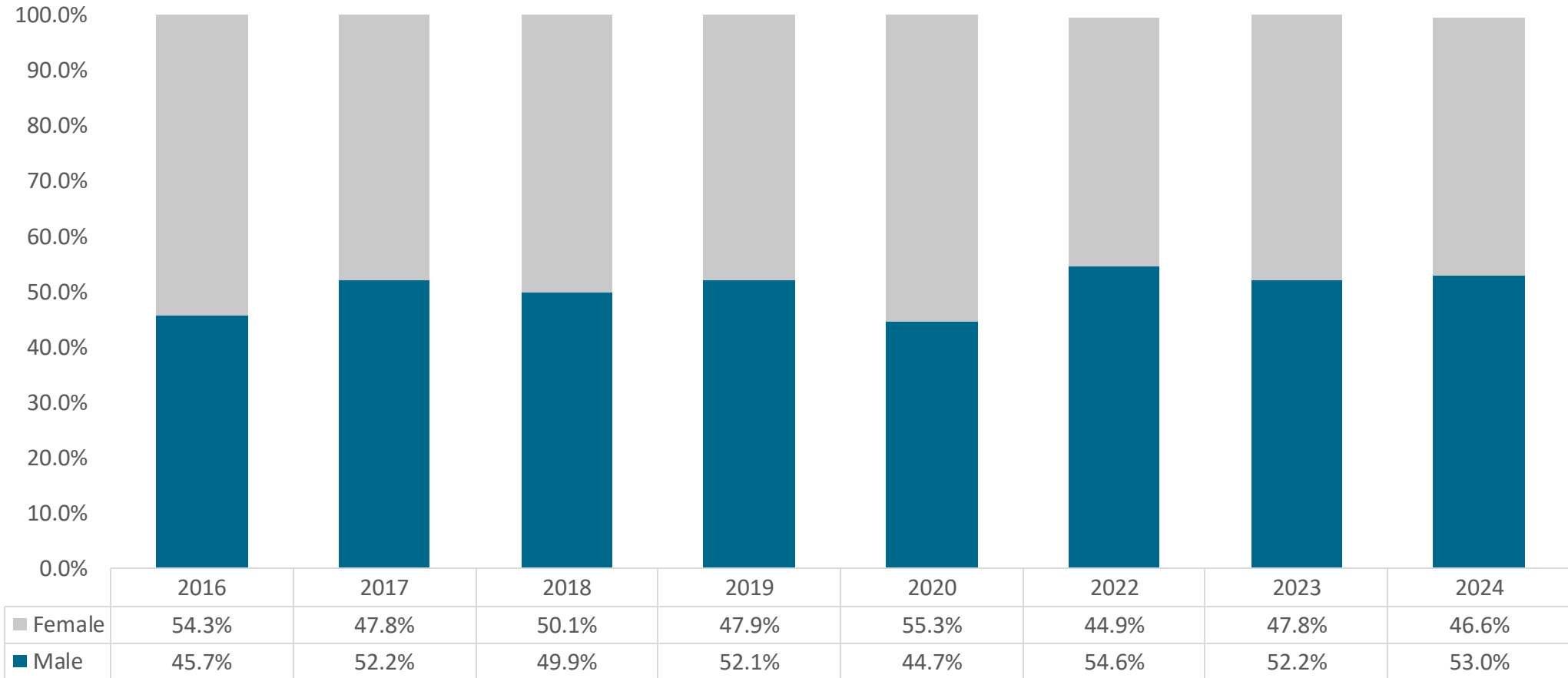
ACTIVITIES - OTHER - KOREA

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	22.6%	26.4%	100.0%	0.0%	21.8%	16.2%
Visiting friends/ relatives	22.0%	26.4%	100.0%	0.0%	18.4%	11.9%
Giving back to the local community	1.1%	0.0%	0.0%	0.0%	4.5%	4.3%

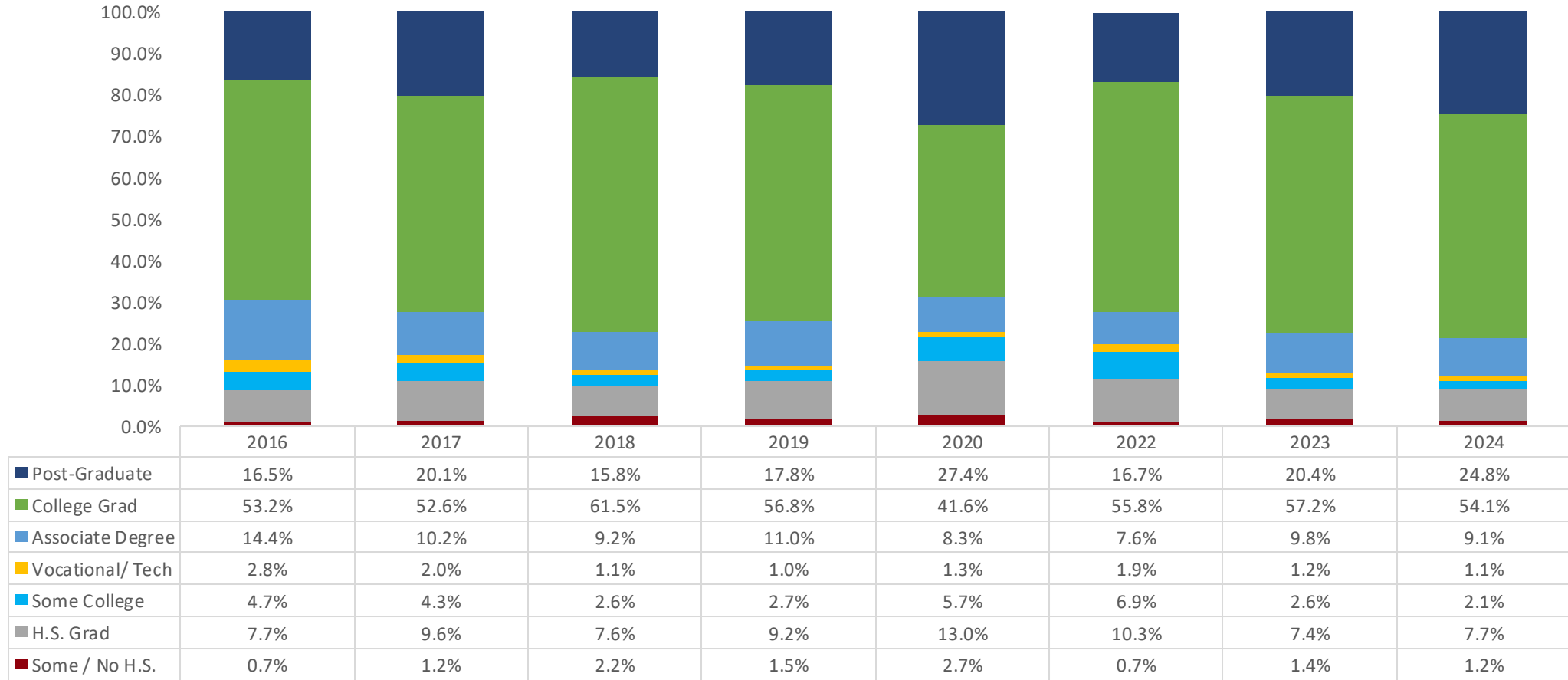
ACTIVITIES - OTHER - KOREA

	2018	2019	2020	2022	2023	2024
TOTAL	16.2%	18.7%	19.4%	27.8%	20.2%	22.8%
Visiting friends/ relatives	14.6%	17.7%	19.4%	24.6%	19.0%	21.6%
Giving back to the local community	1.8%	1.0%	0.3%	3.6%	1.4%	1.7%

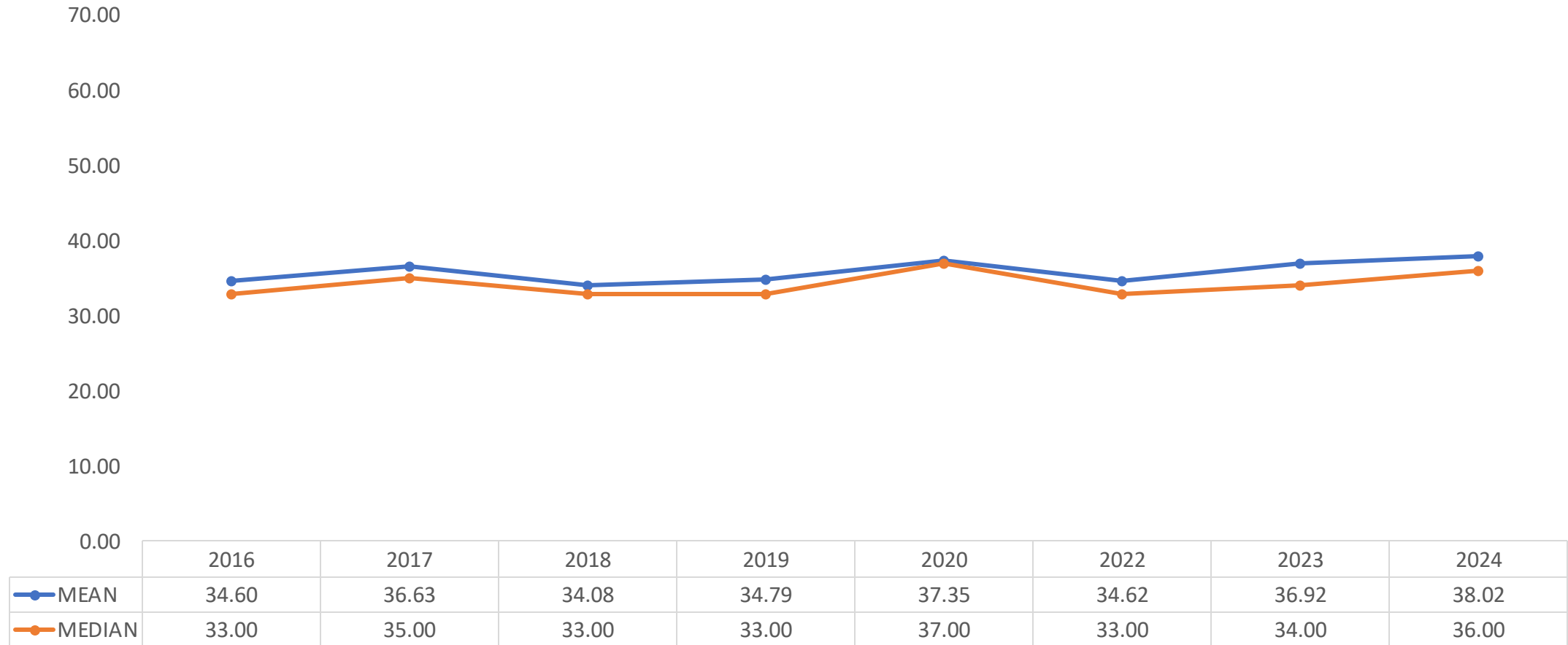
VISITOR PROFILE - GENDER - KOREA



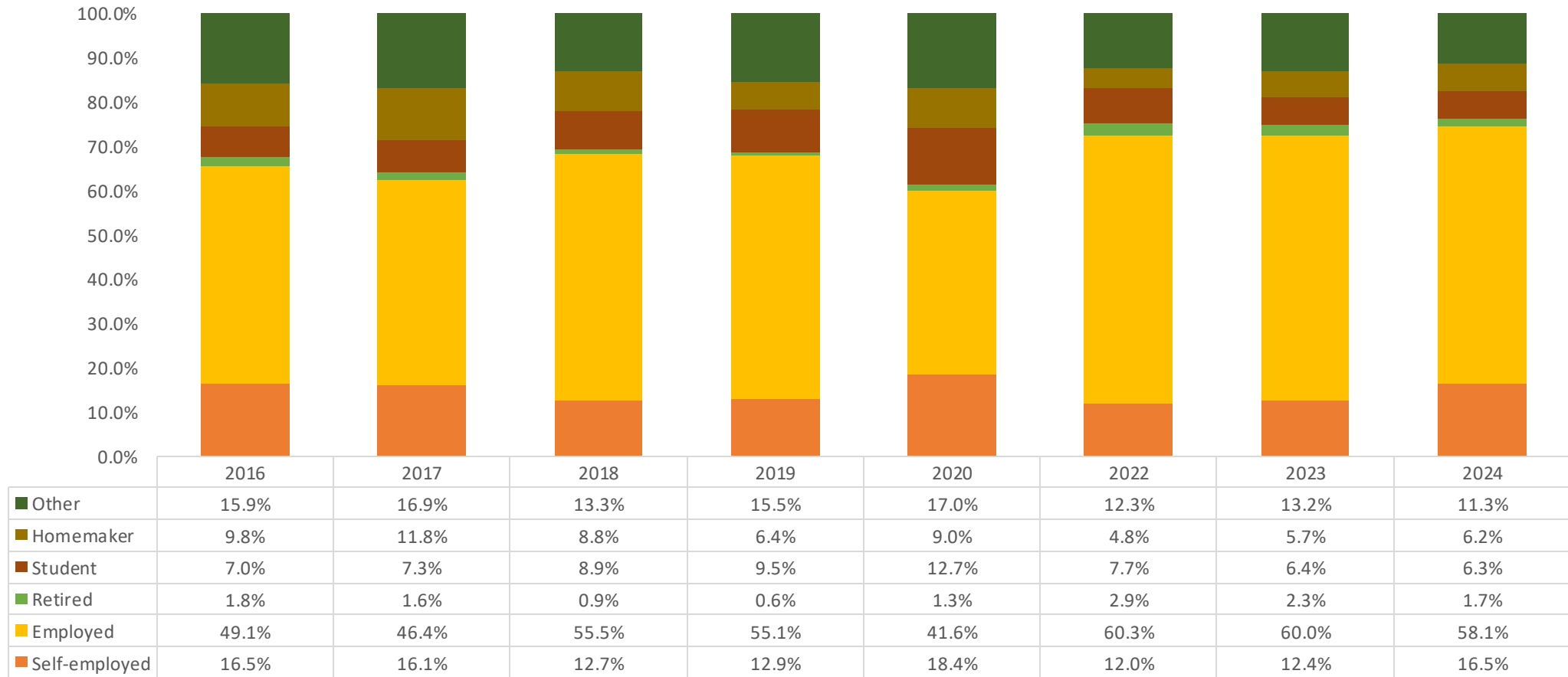
VISITOR PROFILE - EDUCATION - KOREA



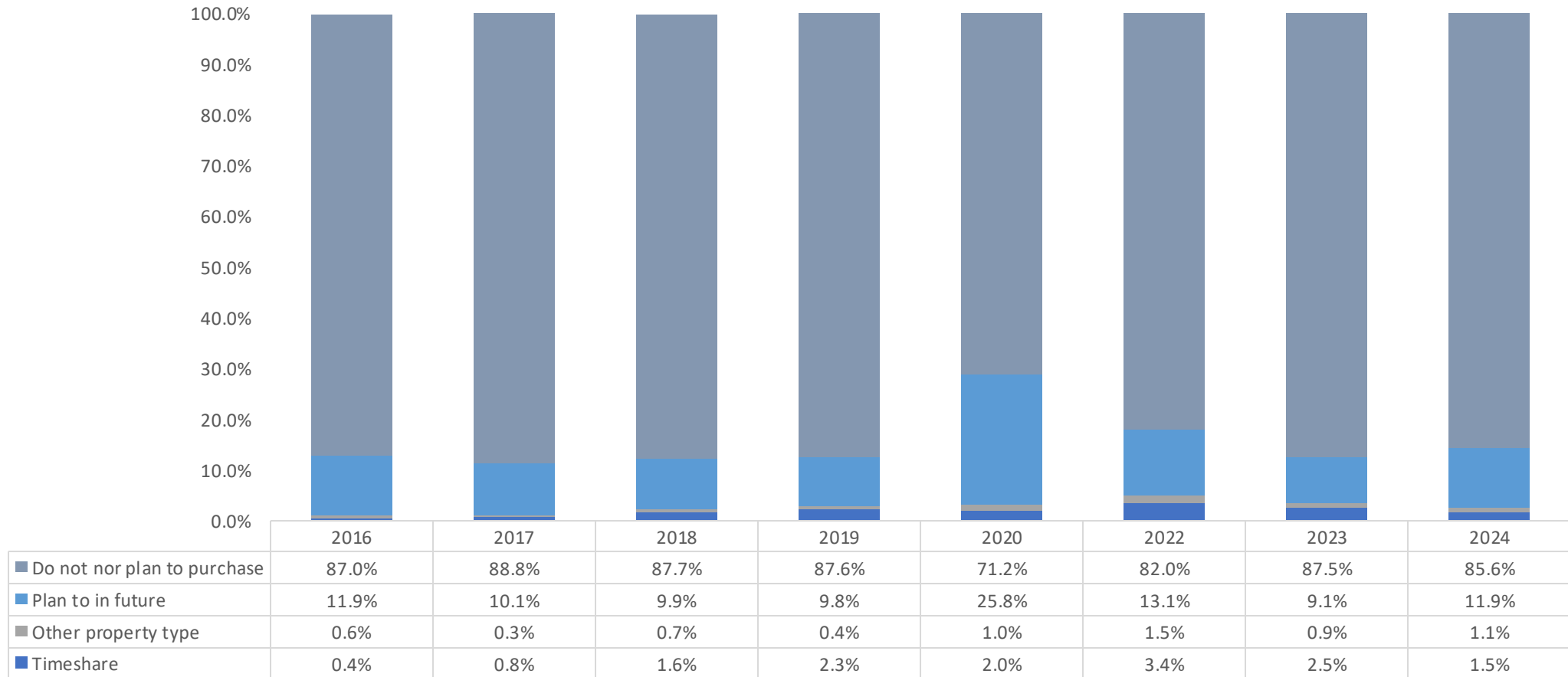
VISITOR PROFILE - AGE - KOREA



VISITOR PROFILE - EMPLOYMENT STATUS - KOREA



VISITOR PROFILE - HAWAI'I PROPERTY OWNER - KOREA



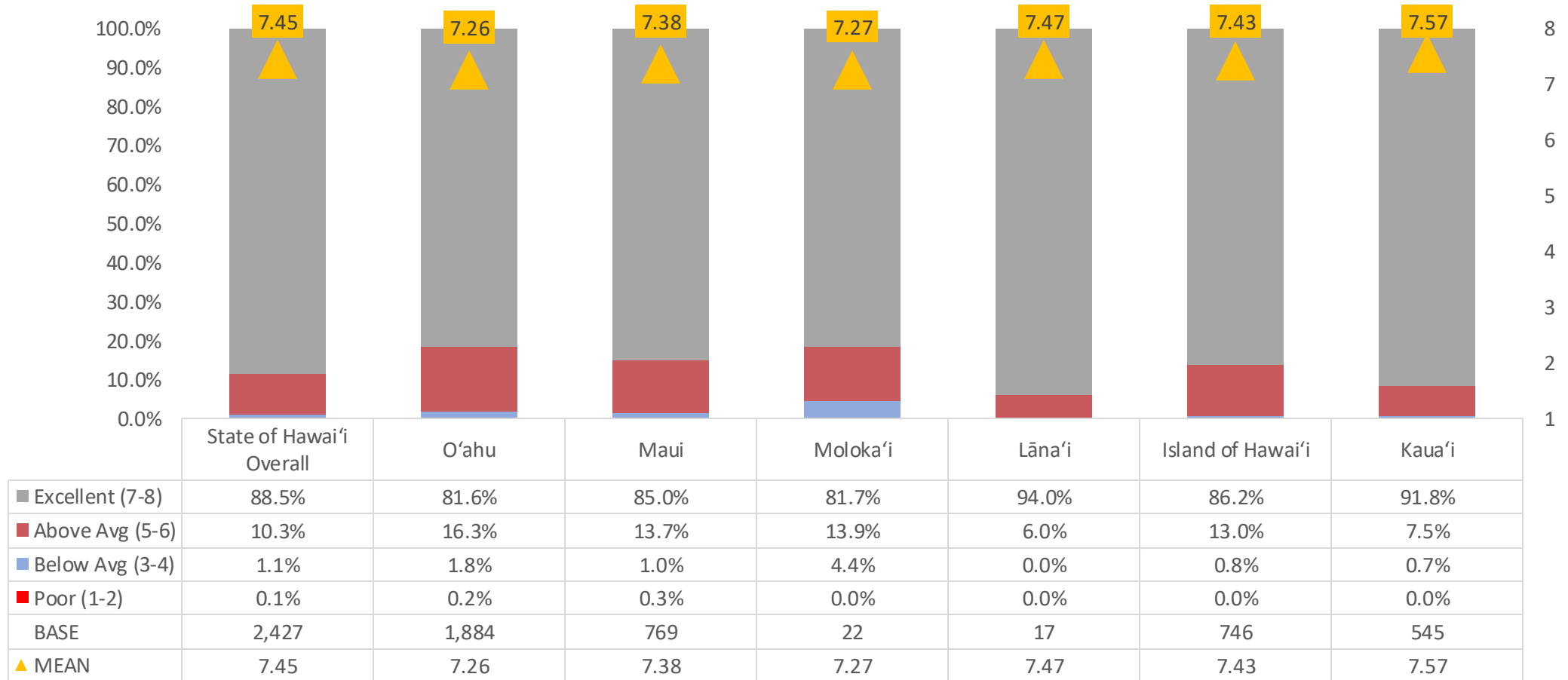
VISITOR PROFILE - HOUSEHOLD INCOME - KOREAN WON

	2018	2019	2020	2022	2023	2024
< ₩16,305,000	16.0%	13.0%	10.2%	5.4%	9.1%	8.6%
₩16,305,000 - ₩21,171,999	9.3%	9.6%	7.3%	5.5%	5.0%	5.4%
₩27,174,000 - ₩38,041,999	16.6%	13.7%	8.4%	14.3%	10.3%	7.0%
₩38,044,000 - ₩48,911,999	10.2%	10.9%	11.7%	10.1%	11.4%	9.2%
₩48,912,000 - ₩59,781,999	10.4%	9.3%	10.9%	10.3%	8.8%	8.6%
₩59,782,000 - ₩70,652,999	11.9%	10.8%	12.8%	7.6%	8.7%	9.2%
₩70,653,000 - ₩81,520,999	7.1%	7.5%	6.9%	9.3%	8.4%	11.2%
₩81,521,000 - ₩92,390,999	3.5%	5.3%	6.9%	7.2%	5.0%	7.2%
₩92,391,000 - ₩103,259,999	4.3%	4.5%	6.2%	6.3%	6.7%	7.9%
₩103,260,000+	10.9%	15.4%	18.7%	24.2%	26.5%	25.7%

Section 19 – Europe

OVERALL SATISFACTION - MOST RECENT TRIP - EUROPE

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



PRIMARY PURPOSE OF TRIP - EUROPE

	2018	2019	2024
Vacation	66.6%	67.2%	68.3%
Visit friends/ relatives	4.2%	4.6%	8.4%
Honeymoon	8.3%	8.2%	6.0%
Convention, conference, seminar	3.4%	1.7%	3.5%
Anniversary/ birthday	5.7%	6.3%	1.9%

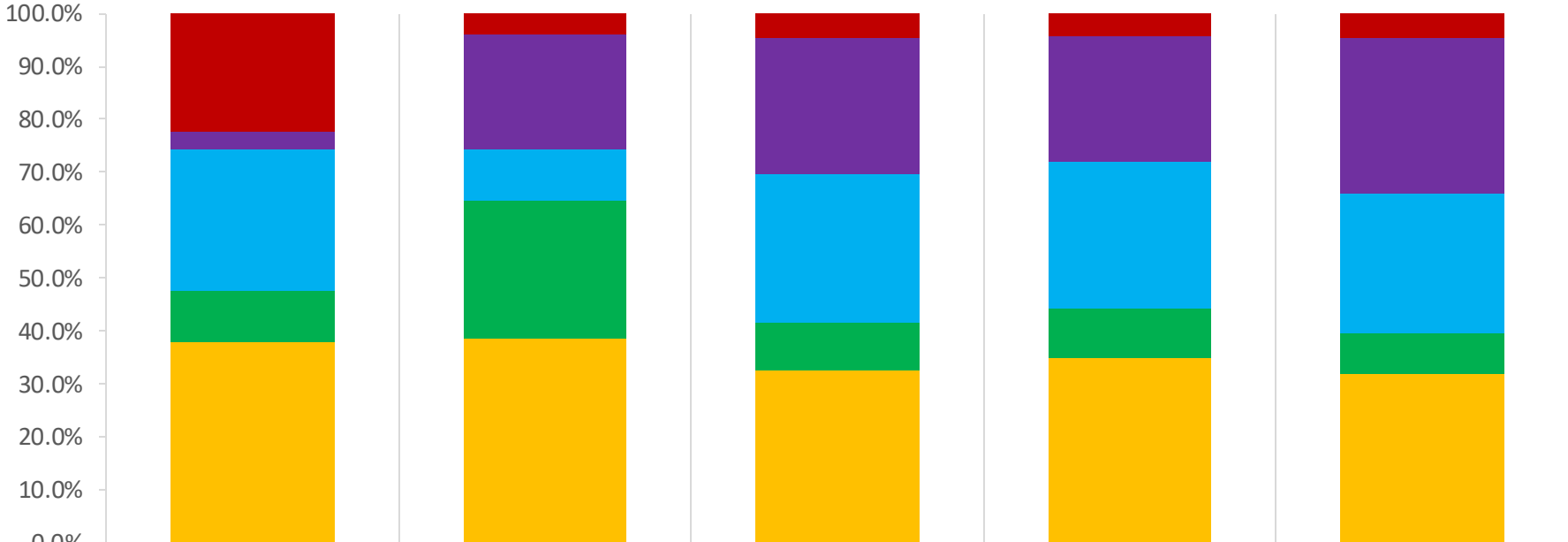
For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

PRIMARY + SECONDARY PURPOSE OF TRIP - EUROPE

	2018	2019	2024
Vacation	86.5%	87.9%	87.4%
Visit friends/ relatives	8.7%	8.7%	12.6%
Honeymoon	9.8%	9.2%	7.4%
Convention, conference, seminar	4.1%	2.2%	4.0%
Anniversary/ birthday	12.4%	13.2%	3.5%
Sporting event	2.2%	2.6%	3.1%
Other business trip/ work in Hawai'i	2.2%	1.8%	3.1%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

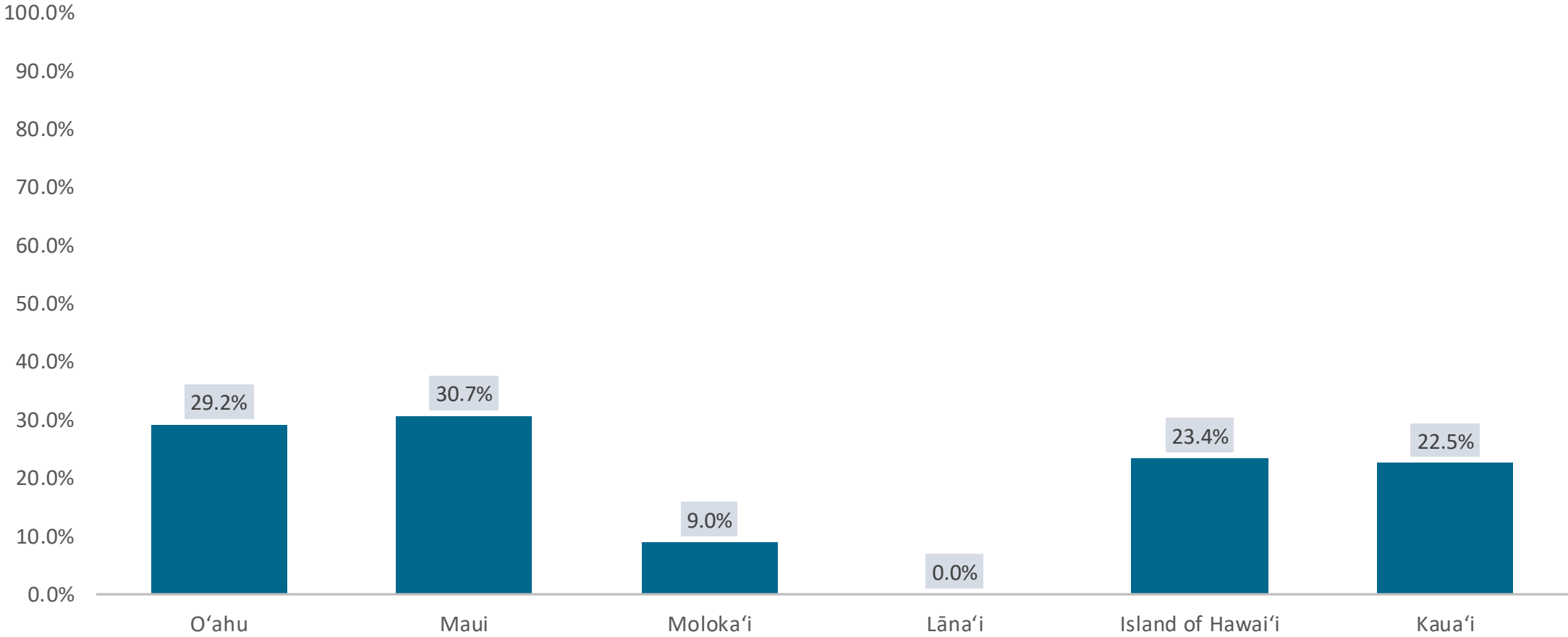
VACATION TRIP DESCRIPTION - EUROPE



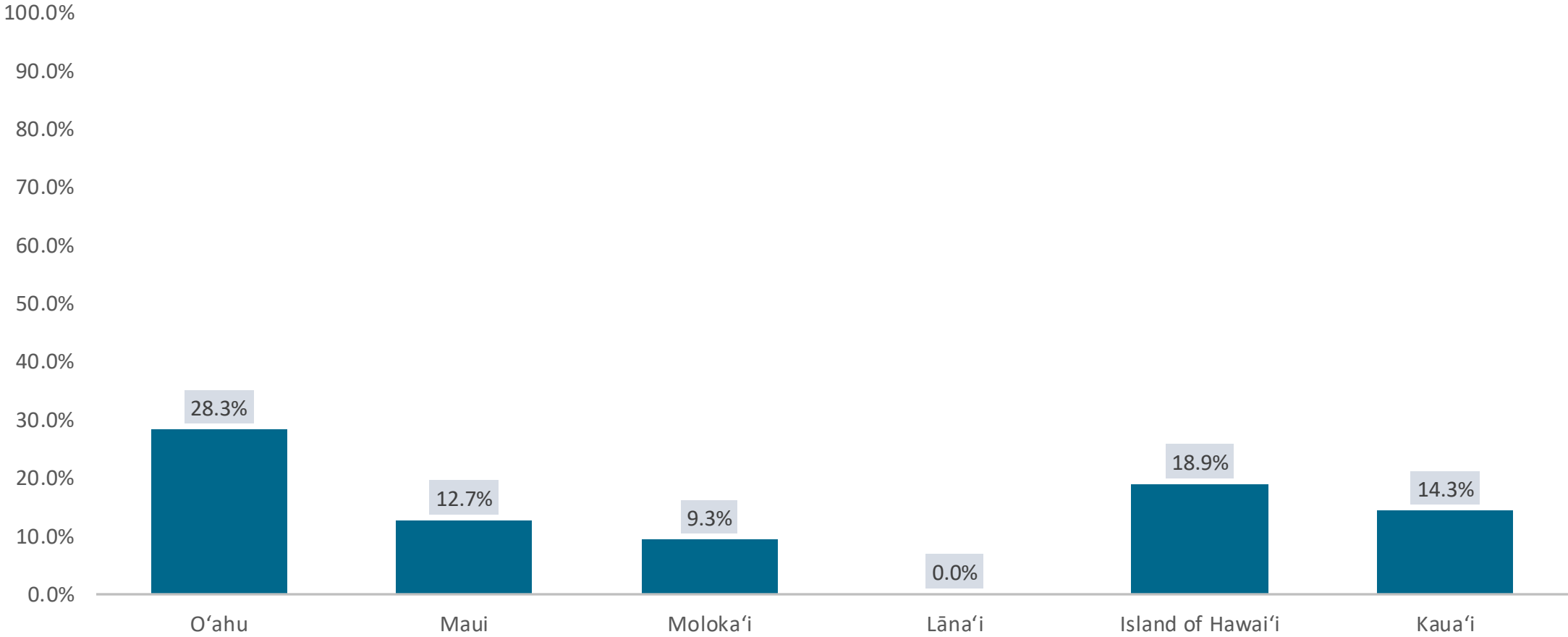
	2016	2017	2018	2019	2024
Other	22.4%	3.8%	4.5%	4.3%	4.8%
Once-in-a-lifetime	3.3%	21.8%	25.7%	23.8%	29.4%
More special than most trips	26.9%	9.8%	28.3%	27.7%	26.2%
Annual/ Semi-annual trip	9.7%	26.1%	8.8%	9.6%	7.6%
Special occasion	37.7%	38.4%	32.6%	34.7%	32.0%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

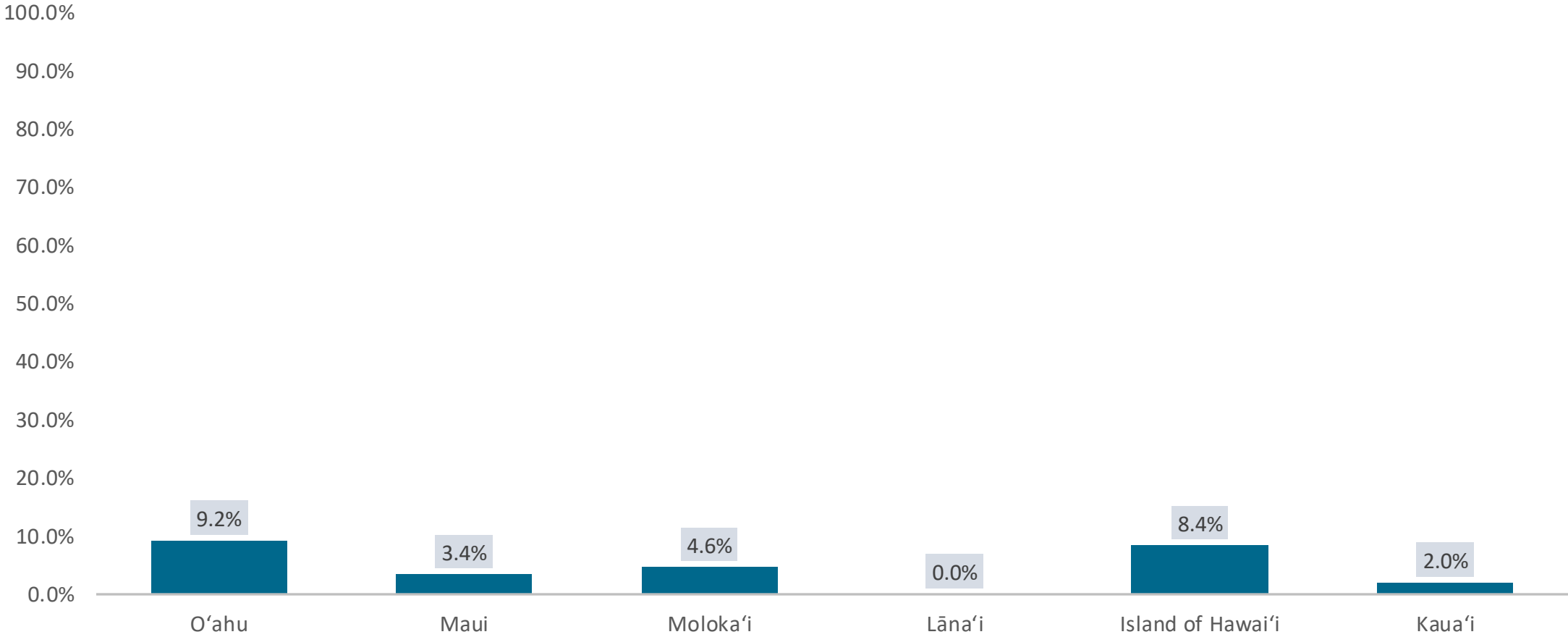
ADVERTISING AWARENESS - EUROPE



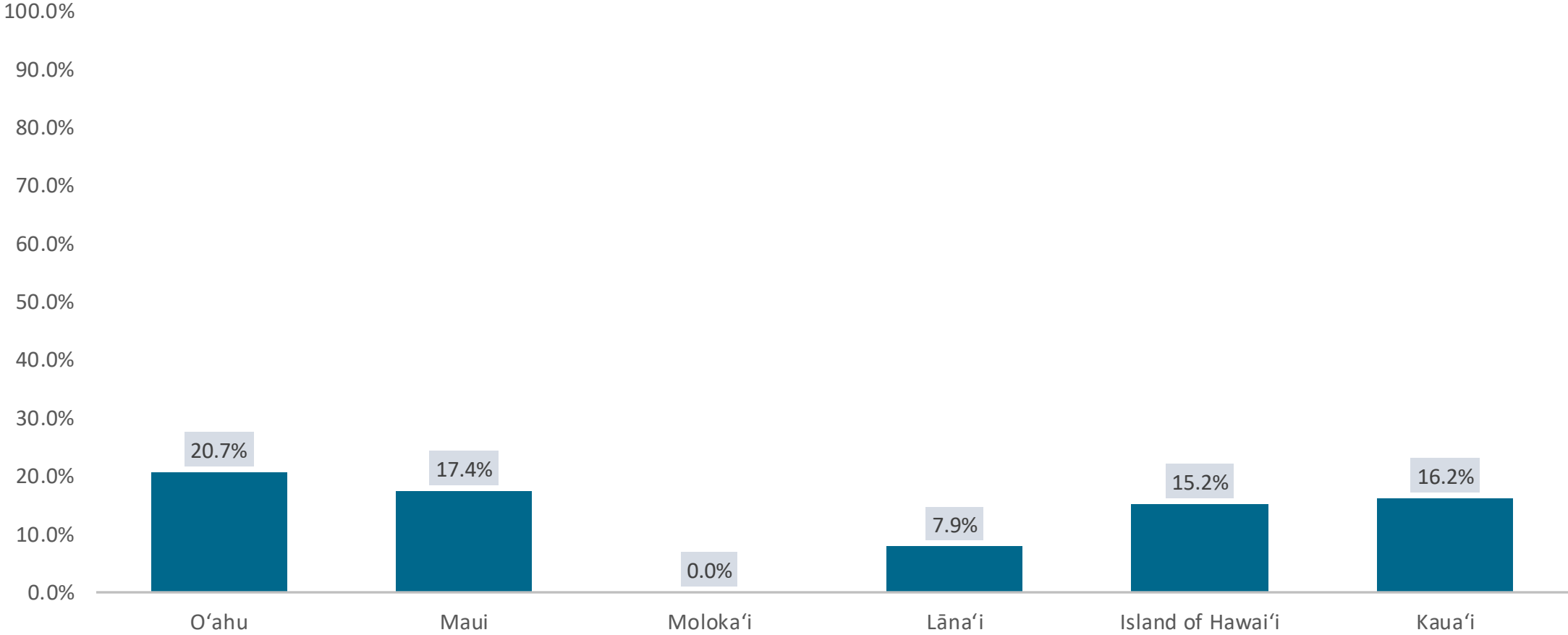
IMPACT OF LOCATION FILMING - EUROPE



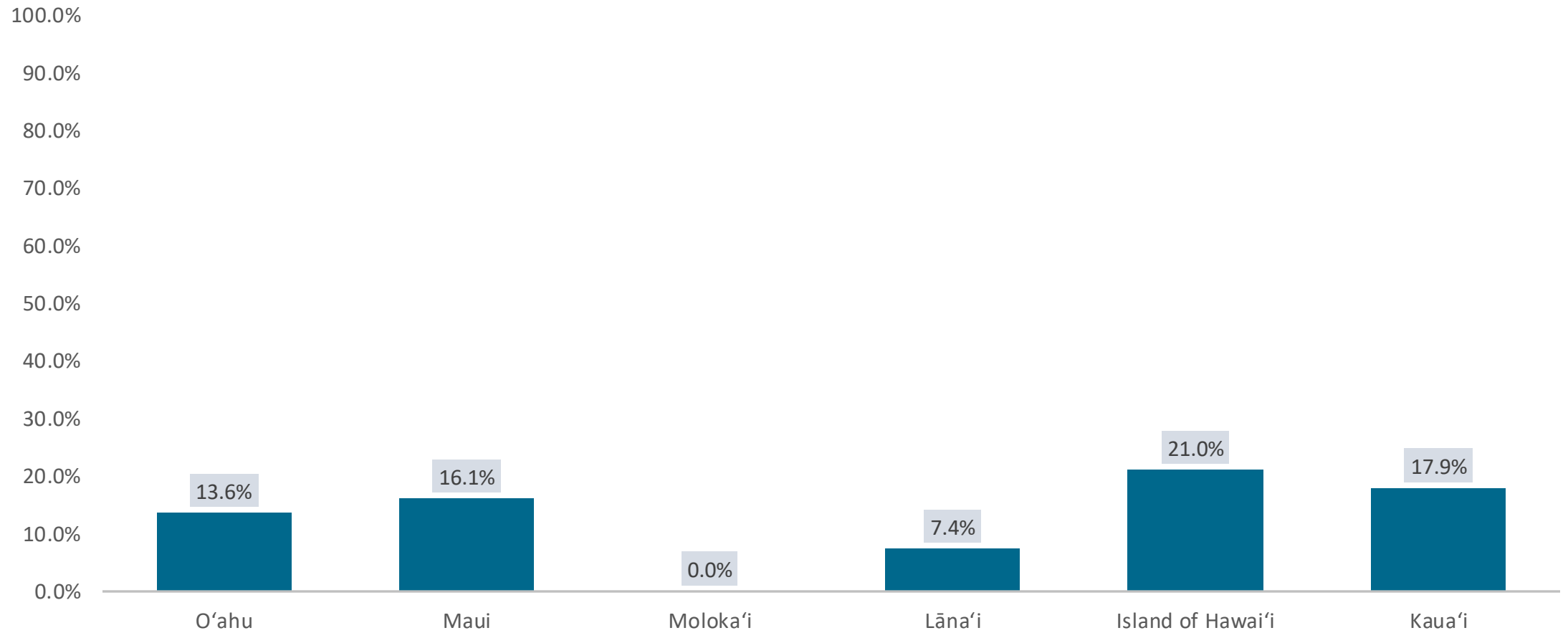
IMPACT OF HAWAIIAN MUSIC - EUROPE



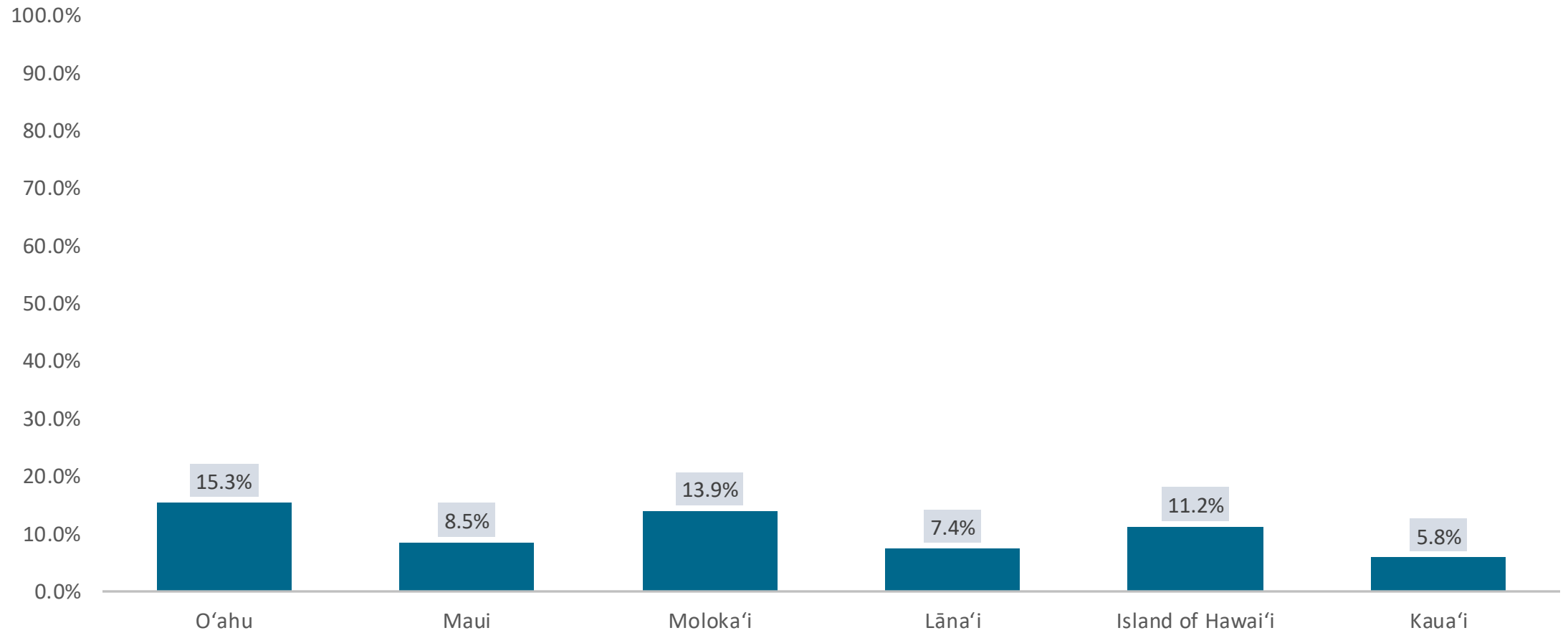
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - EUROPE



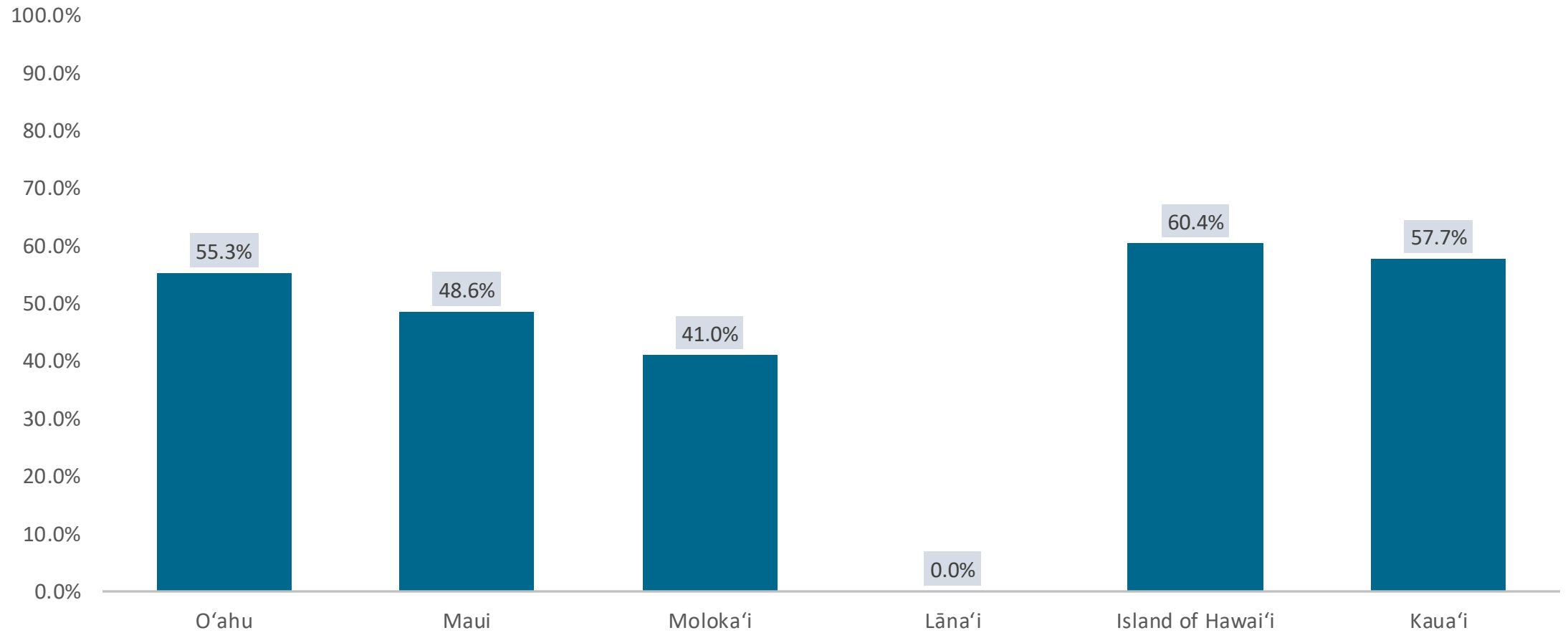
IMPACT OF OUTDOOR/ SPORTING EVENTS - EUROPE



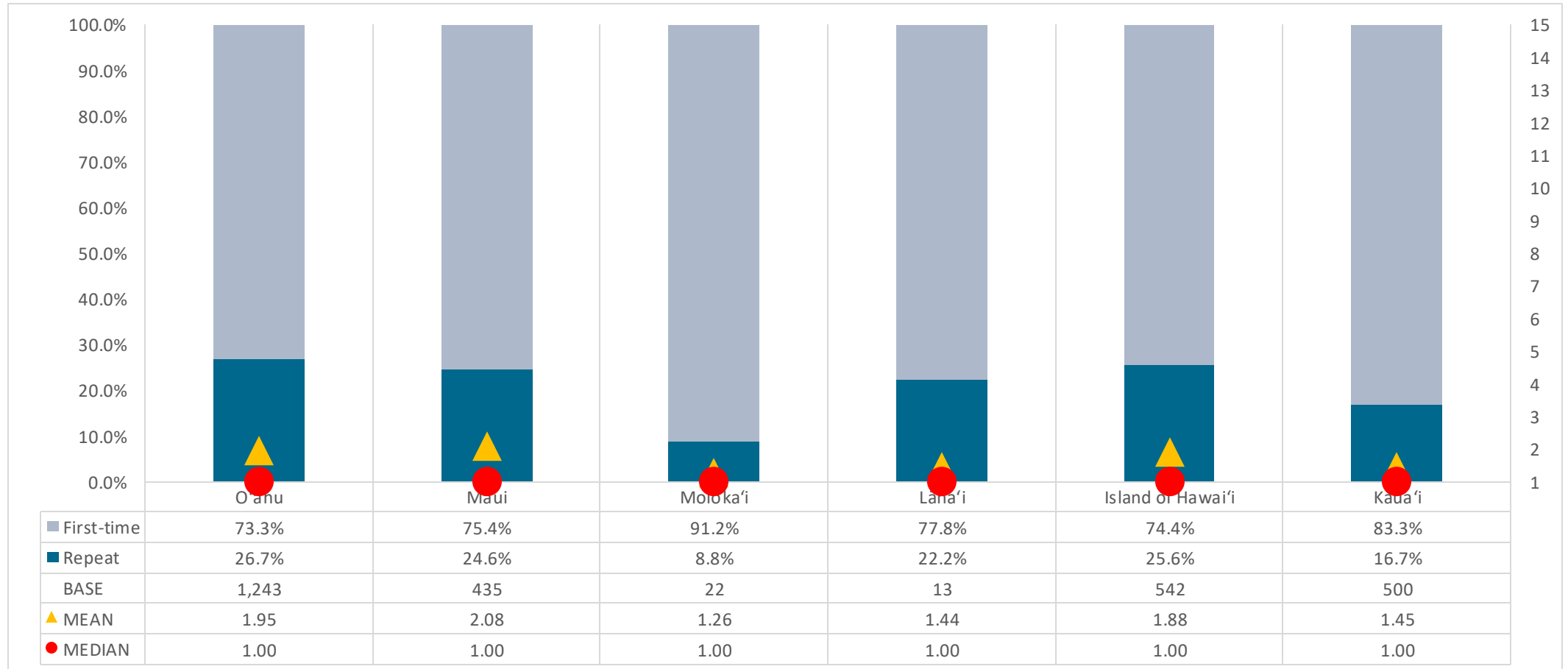
IMPACT OF HAWAIIAN CULTURAL EVENTS - EUROPE



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - EUROPE



1ST TIME VS REPEAT VISITORS - EUROPE



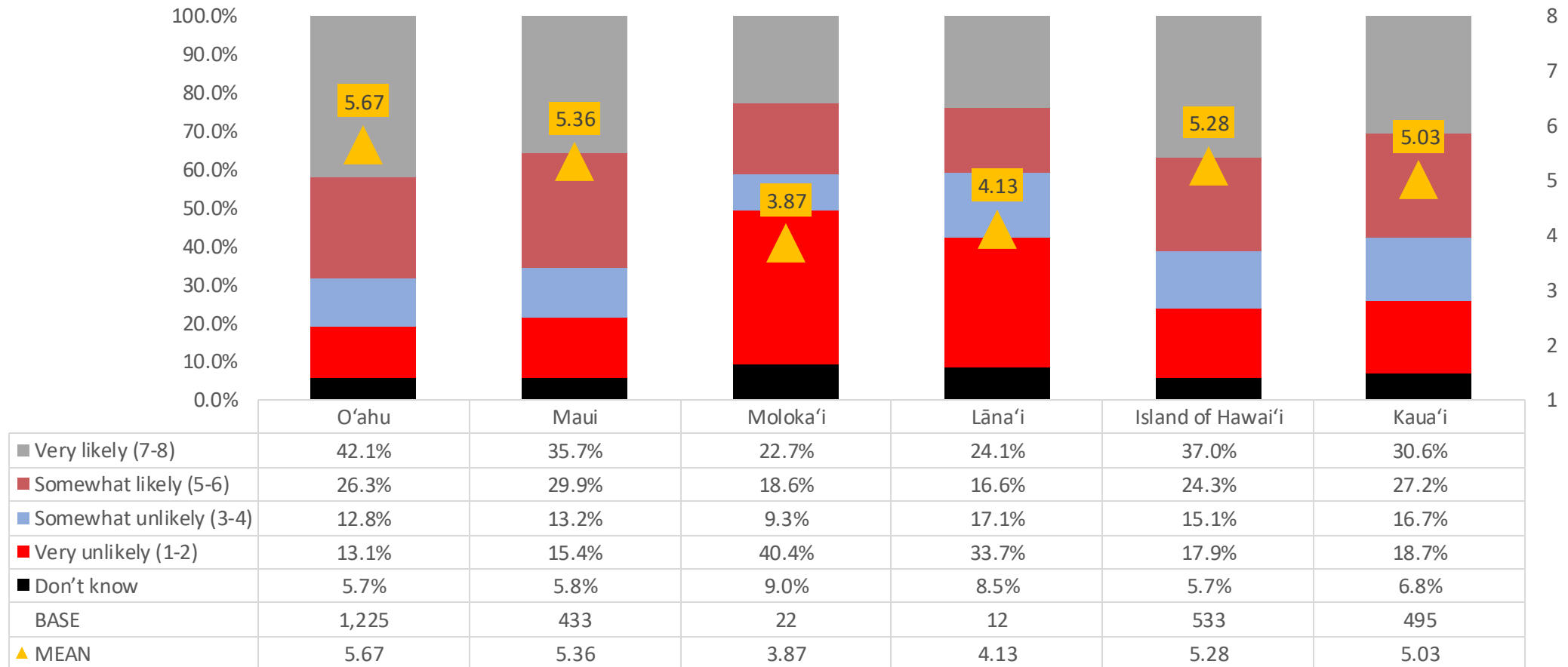
TRAVEL PARTY MEMBERS - EUROPE

	2016	2017	2018	2019	2024
My spouse	55.5%	52.8%	51.4%	50.7%	45.9%
Other adult members of my family	14.7%	16.7%	17.1%	19.3%	18.1%
My child(ren)/ grandchild(ren) under 18	12.8%	11.6%	14.1%	14.7%	15.1%
My friends/ associates	15.3%	15.5%	14.1%	15.7%	15.2%
Myself only (traveled alone/ no one else)	13.8%	13.4%	13.4%	11.8%	15.4%
My girlfriend/ boyfriend	11.5%	11.1%	12.0%	13.8%	11.8%
Same-gender partner	0.6%	1.6%	1.7%	1.5%	1.4%

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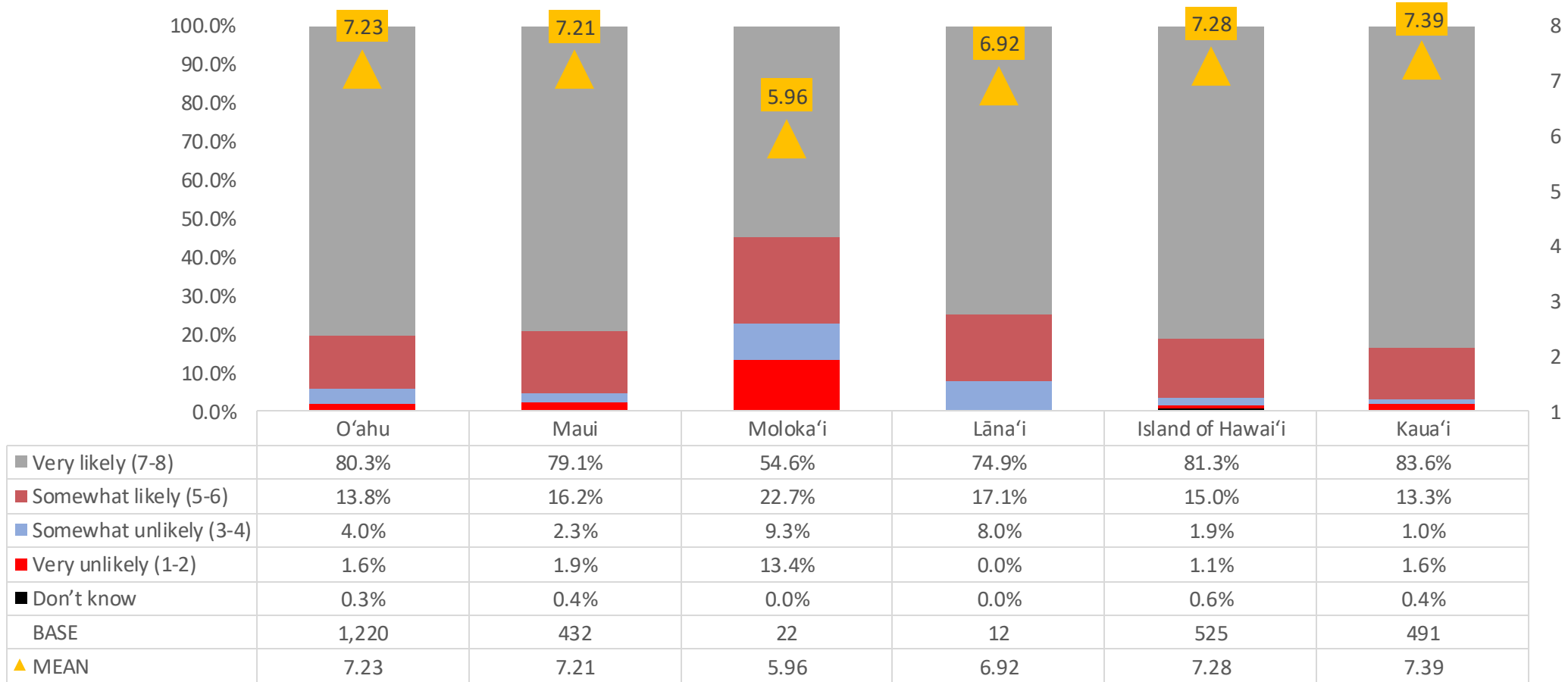
LIKELIHOOD OF RETURN VISIT - EUROPE

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



BRAND/ DESTINATION ADVOCACY - EUROPE

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



ACTIVITIES - SIGHTSEEING - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	97.8%	98.3%	100.0%	100.0%	99.1%	99.8%
On own (self-guided)/ driving around the island	66.6%	79.3%	68.3%	35.7%	86.2%	79.1%
Helicopter ride/ airplane tour	4.9%	7.2%	9.0%	0.0%	8.3%	32.6%
Boat tour/ submarine ride/ whale watching	18.2%	28.8%	9.0%	27.5%	25.1%	24.2%
Visiting towns/ communities	39.2%	42.7%	27.1%	18.1%	50.6%	45.1%
Private limousine/ van tour/ tour bus	21.0%	8.0%	22.4%	9.3%	11.1%	9.4%
Scenic views/ natural landmarks	59.2%	61.3%	50.0%	54.9%	71.4%	68.2%
Movie and TV filming location tours	15.0%	1.4%	0.0%	9.3%	3.6%	6.8%

ACTIVITIES - SIGHTSEEING - EUROPE

	2017	2018	2019	2024
TOTAL	98.0%	95.7%	96.0%	98.6%
On own (self-guided)/ driving around the island	75.5%	72.3%	73.2%	75.3%
Helicopter ride/ airplane tour	16.8%	15.0%	14.1%	12.1%
Boat tour/ submarine ride/ whale watching	32.1%	26.6%	26.7%	24.5%
Visiting towns/ communities	26.7%	46.3%	43.9%	44.8%
Private limousine/ van tour/ tour bus	23.1%	21.3%	17.8%	16.1%
Scenic views/ natural landmarks	75.8%	64.4%	62.6%	64.8%
Movie and TV filming location tours	9.9%	7.8%	7.5%	10.1%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

ACTIVITIES - RECREATION - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII	KAUA'I
TOTAL	96.6%	96.4%	77.1%	91.2%	95.7%	93.8%
Beach/ sunbathing	85.4%	84.9%	54.4%	81.9%	78.3%	77.6%
Bodyboarding	5.8%	7.2%	0.0%	0.0%	5.0%	6.0%
Stand-up paddle boarding	4.2%	2.8%	0.0%	8.8%	3.3%	1.0%
Surfing	15.2%	9.3%	0.0%	9.3%	7.9%	8.3%
Canoe paddling	1.2%	1.7%	0.0%	0.0%	2.5%	2.7%
Kayaking	1.4%	2.2%	0.0%	9.3%	3.7%	6.8%
Swimming in the ocean	66.6%	71.4%	45.6%	18.1%	66.2%	57.7%
Snorkeling	30.3%	46.7%	8.8%	54.9%	54.7%	40.8%
Freediving	1.2%	2.2%	0.0%	0.0%	2.7%	0.6%
Windsurfing/ kitesurfing	0.6%	2.1%	0.0%	0.0%	0.2%	0.2%
Jet skiing/parasailing	0.8%	1.0%	0.0%	0.0%	0.2%	0.0%
Scuba diving	2.0%	3.2%	4.6%	0.0%	2.7%	2.7%
Fishing	0.5%	0.7%	0.0%	0.0%	1.2%	1.2%
Golf	1.9%	3.6%	0.0%	0.0%	3.2%	2.3%

ACTIVITIES - RECREATION - EUROPE

	2017	2018	2019	2024
TOTAL	97.5%	96.5%	96.9%	96.0%
Beach/ sunbathing	88.5%	86.3%	85.2%	84.3%
Bodyboarding	15.5%	12.5%	12.7%	6.3%
Stand-up paddle boarding	*	*	*	3.6%
Surfing	12.9%	12.1%	12.3%	12.8%
Canoe paddling	7.1%	7.9%	6.9%	2.0%
Kayaking	**	**	**	3.4%
Swimming in the ocean	NA	69.5%	72.0%	67.7%
Snorkeling	NA	43.8%	47.1%	41.7%
Freediving	NA	NA	NA	1.7%
Windsurfing/ kitesurfing	1.5%	1.1%	1.2%	0.8%
Jet skiing/ parasailing	0.9%	0.7%	0.9%	0.7%
Scuba diving	5.7%	3.8%	3.6%	2.7%
Fishing	1.3%	1.3%	0.9%	0.9%
Golf	4.4%	2.4%	3.0%	2.6%

*Combined with bodyboarding

**Combined with Canoe paddling

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ACTIVITIES - RECREATION - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAII'I	KAUA'I
TOTAL	96.6%	96.4%	77.1%	91.2%	95.7%	93.8%
Running/ jogging/ fitness walking	19.6%	19.9%	9.3%	0.0%	20.2%	17.3%
Cycling	2.3%	2.4%	0.0%	0.0%	6.6%	4.6%
Spa	3.5%	7.0%	0.0%	0.0%	3.7%	3.1%
Hiking	41.6%	43.9%	27.1%	26.9%	51.4%	56.3%
Backpacking/ camping	0.9%	2.4%	0.0%	0.0%	3.9%	4.1%
Agritourism	10.5%	4.6%	0.0%	0.0%	13.7%	4.2%
Sports event or tournament	2.7%	1.0%	0.0%	0.0%	6.9%	0.2%
Parks/ botanical gardens	37.1%	32.5%	31.2%	0.0%	46.5%	34.1%
Waterparks	0.9%	1.5%	0.0%	0.0%	1.0%	1.3%
Mountain tubing/ waterfall rappel	2.4%	4.1%	0.0%	0.0%	2.7%	4.7%
Zip-lining	1.2%	1.2%	0.0%	0.0%	2.7%	1.4%
Skydiving	0.9%	0.0%	0.0%	0.0%	0.2%	0.0%
All-terrain vehicle (ATV)	2.8%	1.9%	0.0%	0.0%	4.3%	1.0%
Horseback riding	1.5%	1.0%	0.0%	8.8%	1.6%	0.4%

ACTIVITIES - RECREATION - EUROPE

	2017	2018	2019	2024
TOTAL	97.5%	96.5%	96.9%	96.0%
Running/ jogging/ fitness walking	29.4%	19.1%	17.0%	20.7%
Cycling	NA	NA	NA	4.1%
Spa	8.0%	5.6%	6.2%	4.4%
Hiking	26.3%	26.9%	47.0%	47.0%
Backpacking/ camping	*	*	3.1%	2.5%
Agritourism	8.4%	10.5%	9.2%	9.7%
Sports event or tournament	3.7%	2.4%	2.5%	3.1%
Parks/ botanical gardens	43.3%	40.9%	39.3%	39.7%
Waterparks	NA	3.1%	1.7%	1.2%
Mountain tubing/ waterfall rappel	NA	3.8%	3.6%	3.6%
Zip-lining	NA	3.0%	2.3%	1.7%
Skydiving	NA	0.8%	0.8%	0.5%
All-terrain vehicle (ATV)	NA	3.3%	2.3%	2.8%
Horseback riding	NA	1.7%	1.8%	1.4%

* Combined with hiking

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ACTIVITIES - ENTERTAINMENT & DINING - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	98.5%	97.5%	82.0%	81.9%	97.5%	92.9%
Lunch/ sunset/ dinner/ evening cruise	26.0%	27.2%	18.0%	17.6%	21.8%	23.6%
Live music/ stage show	31.4%	23.1%	4.6%	27.5%	18.4%	13.5%
Nightclub/ dancing/ bar/ karaoke	8.9%	3.8%	0.0%	0.0%	3.5%	2.7%
Fine dining	28.1%	27.0%	9.0%	18.7%	24.3%	20.2%
Family restaurant	46.8%	40.5%	22.9%	18.1%	47.9%	33.2%
Fast food	52.4%	31.0%	26.8%	9.3%	39.5%	26.9%
Food truck	46.5%	49.2%	4.6%	0.0%	36.9%	43.9%
Café/ coffee house	54.0%	50.4%	27.1%	27.5%	62.1%	48.2%
Ethnic dining	14.4%	10.1%	0.0%	0.0%	10.9%	8.5%
Farm-to-table cuisine	6.8%	9.5%	4.4%	0.0%	8.6%	8.6%
Prepared own meal	28.7%	44.3%	63.7%	8.8%	49.4%	38.0%

ACTIVITIES - ENTERTAINMENT & DINING - EUROPE

	2017	2018	2019	2024
TOTAL	98.5%	97.1%	97.3%	97.1%
Lunch/ sunset/ dinner/ evening cruise	35.7%	29.9%	29.6%	27.1%
Live music/ stage show	31.8%	30.7%	29.0%	26.9%
Nightclub/ dancing/ bar/ karaoke	10.3%	8.1%	8.3%	6.5%
Fine dining	44.6%	40.6%	39.7%	27.4%
Family restaurant	55.5%	48.8%	47.8%	45.5%
Fast food	46.6%	46.4%	45.2%	43.6%
Food truck	NA	25.9%	32.3%	46.2%
Café/ coffee house	54.1%	53.0%	52.3%	55.3%
Ethnic dining	21.2%	18.6%	20.7%	13.0%
Farm-to-table cuisine	NA	NA	NA	8.4%
Prepared own meal	42.9%	37.6%	39.7%	39.1%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

ACTIVITIES - SHOPPING - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	96.6%	95.6%	77.3%	63.7%	95.7%	90.6%
Malls/ department stores	68.6%	49.1%	0.0%	0.0%	41.1%	30.2%
Designer boutiques	14.4%	10.4%	0.0%	9.3%	8.5%	5.8%
Hotel/ resort stores	30.3%	23.7%	9.0%	9.3%	17.8%	12.6%
Swap meet/ flea market	7.8%	5.0%	8.8%	0.0%	4.4%	2.5%
Discount/ outlet stores	17.1%	9.0%	0.0%	0.0%	12.2%	7.4%
Supermarkets	59.6%	64.7%	54.9%	18.1%	70.1%	59.5%
Farmer's market	29.1%	30.6%	22.4%	0.0%	47.4%	32.0%
Convenience stores	44.0%	32.0%	13.1%	18.1%	31.9%	22.1%
Duty-free stores	10.3%	4.4%	0.0%	0.0%	5.3%	2.1%
Hawai'i-made products	43.9%	39.9%	13.1%	0.0%	46.3%	38.0%
Local shops and artisans	42.3%	48.9%	22.4%	26.9%	48.9%	47.6%
Local fashion designers	11.3%	9.5%	4.4%	9.3%	10.2%	10.1%

ACTIVITIES – SHOPPING – EUROPE

	2017	2018	2019	2024
TOTAL	96.7%	95.6%	95.9%	94.9%
Malls/ department stores	63.5%	58.6%	55.5%	56.3%
Designer boutiques	19.6%	17.7%	14.2%	12.2%
Hotel/ resort stores	29.0%	30.7%	27.0%	25.4%
Swap meet/ flea market	11.9%	6.7%	6.0%	6.4%
Discount/ outlet stores	24.5%	20.0%	17.9%	13.9%
Supermarkets	64.1%	70.2%	69.5%	63.6%
Farmer’s market	29.9%	28.9%	30.5%	35.3%
Convenience stores	33.4%	36.0%	35.6%	38.2%
Duty-free stores	6.4%	6.9%	6.0%	7.5%
Hawai’i-made products	NA	NA	NA	44.5%
Local shops and artisans	62.8%	59.1%	58.9%	47.0%
Local fashion designers	NA	NA	NA	11.1%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	83.5%	58.1%	44.8%	54.9%	75.1%	52.3%
Historic military sites and museums	55.3%	4.3%	0.0%	0.0%	25.2%	5.4%
Historic Hawaiian sites and museums	31.6%	26.6%	36.1%	9.3%	48.3%	25.1%
Other historical sites, museums, and homes	15.0%	10.3%	17.8%	8.8%	18.4%	8.5%
Art museums	4.1%	2.1%	0.0%	0.0%	2.9%	2.5%
Art galleries and exhibitions	5.5%	5.2%	0.0%	0.0%	9.9%	7.7%
Lū'au/ Polynesian show/ hula show	31.7%	23.5%	0.0%	0.0%	19.7%	18.0%
Lesson- e.g. ukulele, hula, canoe, lei making	5.1%	6.9%	0.0%	9.3%	3.3%	3.3%
Play/ concert/ theatre	3.6%	2.4%	0.0%	0.0%	2.1%	1.5%
Art/ craft fair	4.2%	4.7%	0.0%	9.3%	5.8%	3.5%
Festival/ events	4.3%	3.1%	4.4%	18.1%	4.2%	2.7%

ACTIVITIES - HISTORY, CULTURE, FINE ARTS - EUROPE

	2017	2018	2019	2024
TOTAL	77.3%	74.8%	71.1%	74.1%
Historic military sites and museums	43.2%	33.2%	30.3%	34.9%
Historic Hawaiian sites and museums	NA	NA	NA	34.3%
Other historical sites, museums, and homes	34.1%	29.5%	28.5%	15.1%
Art museums	*	*	*	3.5%
Art galleries and exhibitions	*	*	*	7.0%
Lū'au/ Polynesian show/ hula show	36.2%	34.2%	30.4%	28.0%
Lesson- e.g. ukulele, hula, canoe, lei making	5.7%	8.1%	7.4%	5.3%
Play/ concert/ theatre	4.8%	5.5%	3.6%	3.0%
Art/ craft fair	7.6%	9.0%	7.1%	5.0%
Festival/ events	8.1%	4.7%	4.4%	4.4%

* Combined Museum/ Art galleries as single option

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

ACTIVITIES - TRANSPORTATION - EUROPE

	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	95.6%	92.8%	72.9%	73.6%	94.0%	91.9%
Airport shuttle	16.3%	10.3%	0.0%	36.3%	18.9%	9.5%
Trolley	5.9%	0.0%	0.0%	0.0%	4.1%	0.8%
Public bus	26.8%	6.1%	4.6%	0.0%	13.1%	3.4%
Tour bus/ tour van	19.7%	8.0%	9.0%	9.3%	11.0%	10.8%
Taxi/ limo	24.5%	8.4%	4.4%	9.3%	9.7%	5.6%
Rental car	45.0%	72.4%	41.0%	8.8%	78.2%	74.9%
Ride share	32.7%	18.6%	4.6%	18.7%	14.4%	6.6%
Care share	3.0%	2.9%	9.3%	0.0%	1.6%	1.0%
Bicycle rental	1.2%	1.9%	0.0%	0.0%	3.1%	3.4%

ACTIVITIES - TRANSPORTATION - EUROPE

	2017	2018	2019	2024
TOTAL	98.0%	94.4%	95.2%	93.5%
Airport shuttle	31.7%	26.8%	21.4%	15.7%
Trolley	7.8%	7.2%	5.5%	3.9%
Public bus	19.8%	18.7%	15.7%	17.9%
Tour bus/ tour van	18.2%	20.3%	18.0%	15.5%
Taxi/ limo	31.6%	25.9%	21.8%	17.0%
Rental car	66.5%	62.4%	64.8%	61.0%
Ride share	NA	11.9%	17.6%	23.9%
Car share	NA	NA	NA	2.5%
Bicycle rental	NA	3.3%	3.2%	2.4%

For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

ACTIVITIES - OTHER - EUROPE

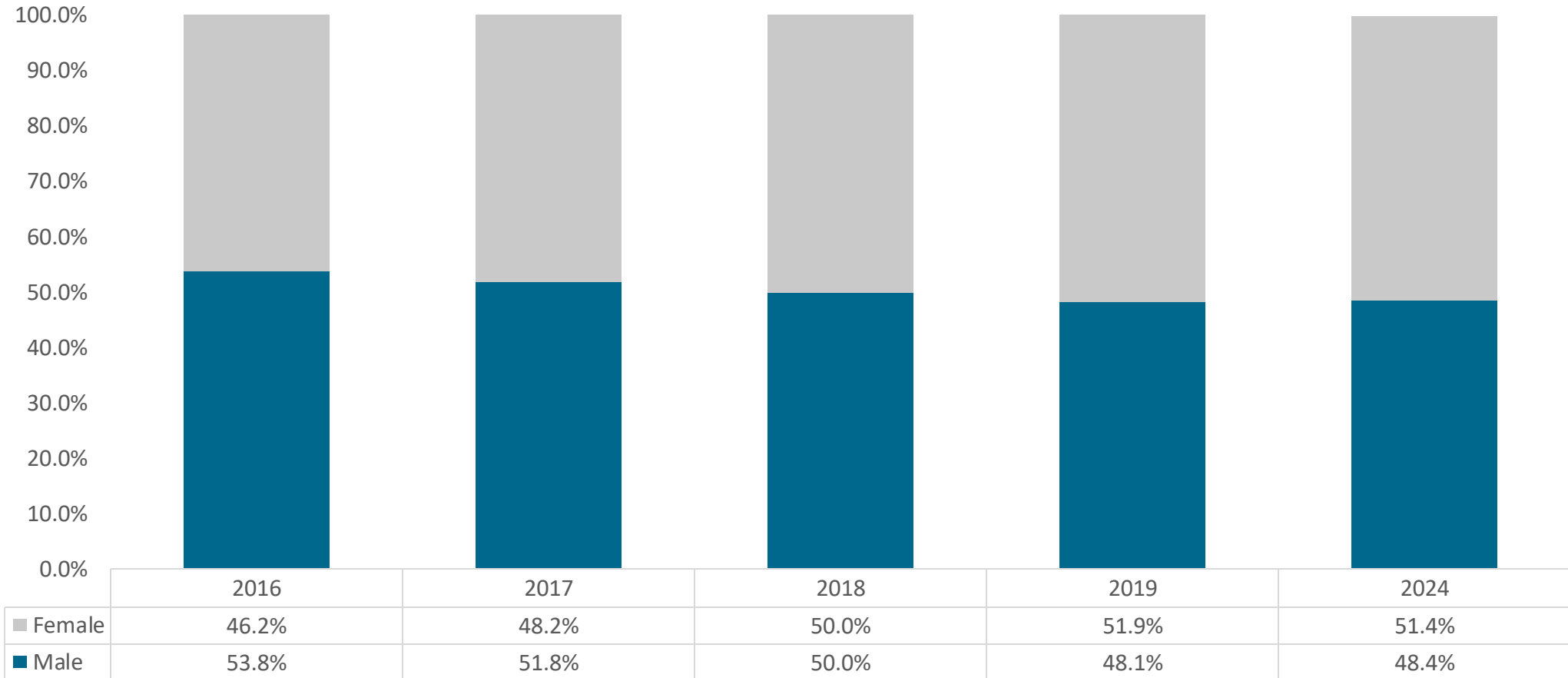
	O'AHU	MAUI	MOLOKA'I	LĀNA'I	ISLAND OF HAWAI'I	KAUA'I
TOTAL	16.7%	17.8%	9.0%	18.1%	18.7%	10.3%
Visiting friends/ relatives	14.1%	14.9%	4.4%	18.1%	15.8%	6.9%
Giving back to the local community	3.2%	3.1%	4.6%	0.0%	3.9%	3.7%

ACTIVITIES - OTHER - EUROPE

	2018	2019	2024
TOTAL	15.5%	14.9%	17.4%
Visiting friends/ relatives	13.4%	12.9%	14.3%
Giving back to the local community	2.3%	2.1%	3.7%

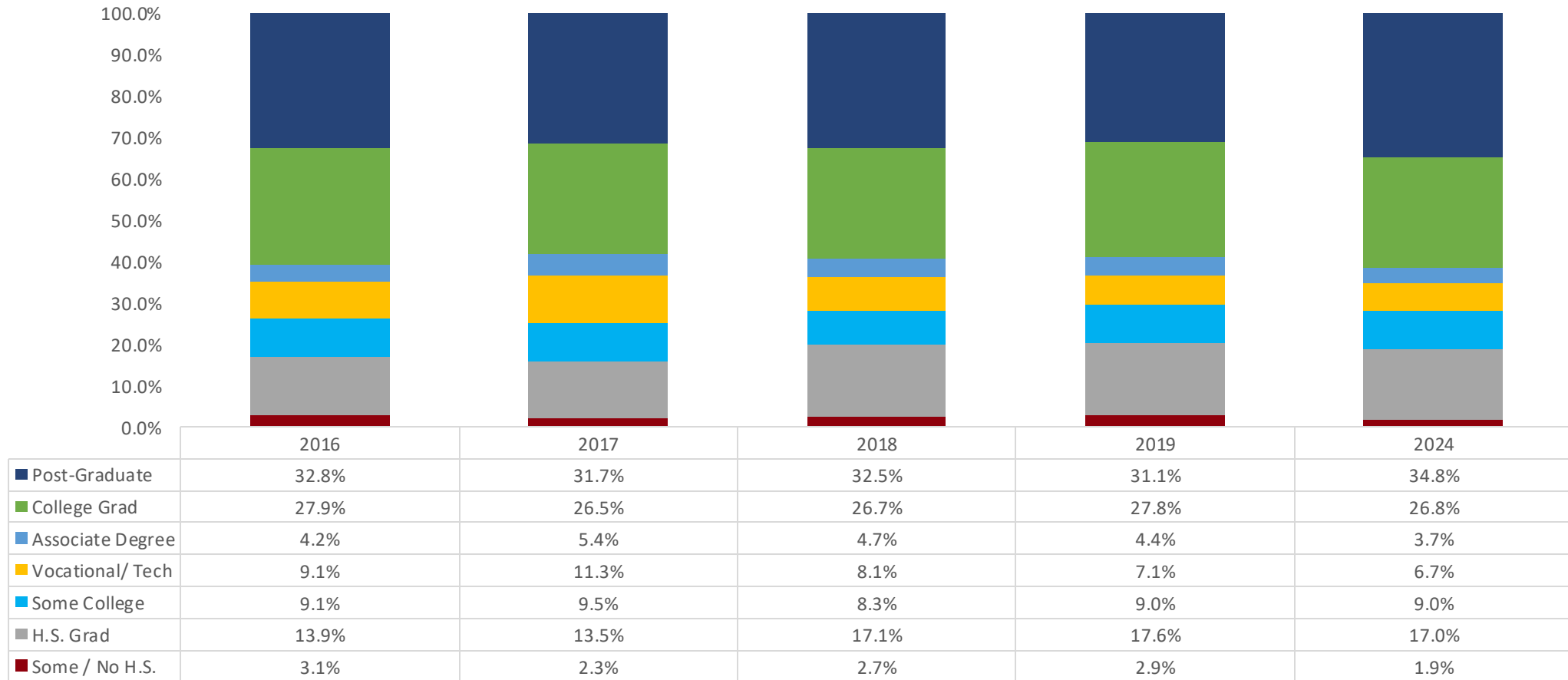
For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

VISITOR PROFILE - GENDER - EUROPE



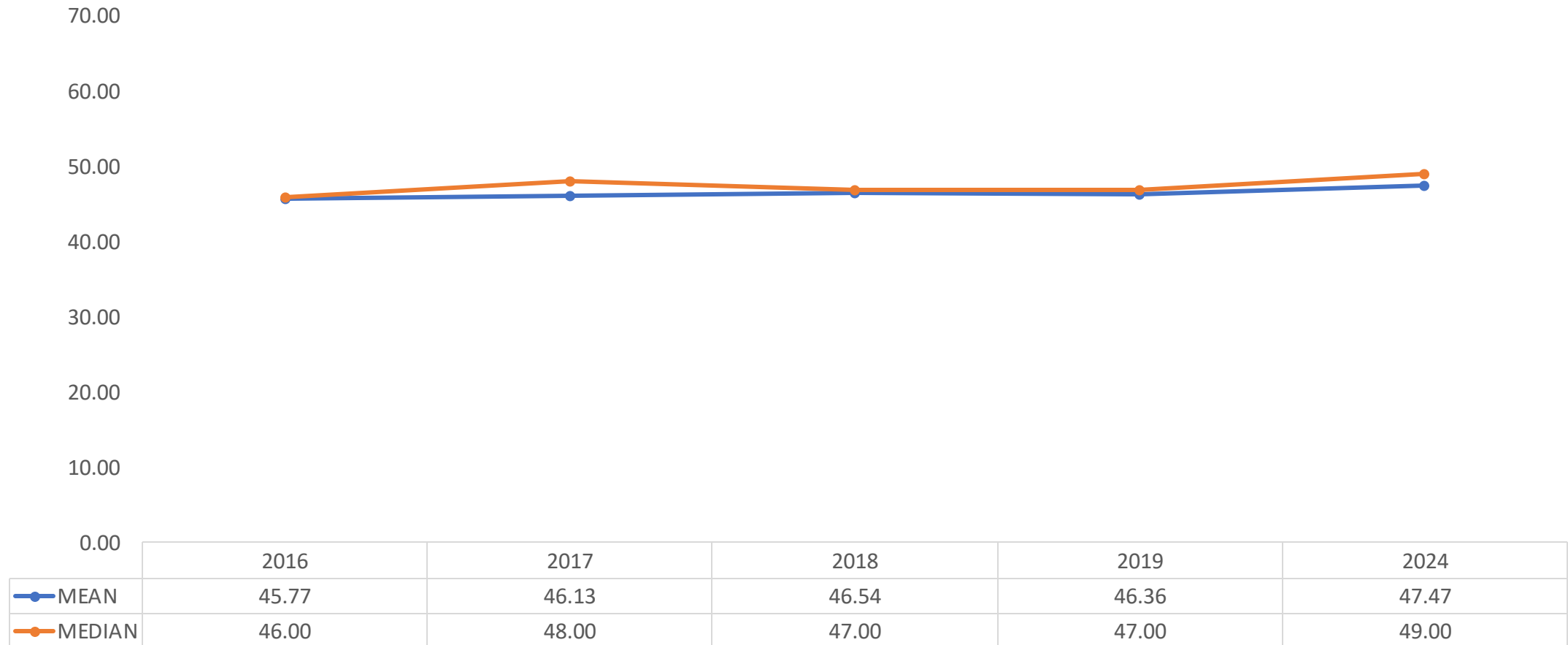
For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

VISITOR PROFILE - EDUCATION - EUROPE



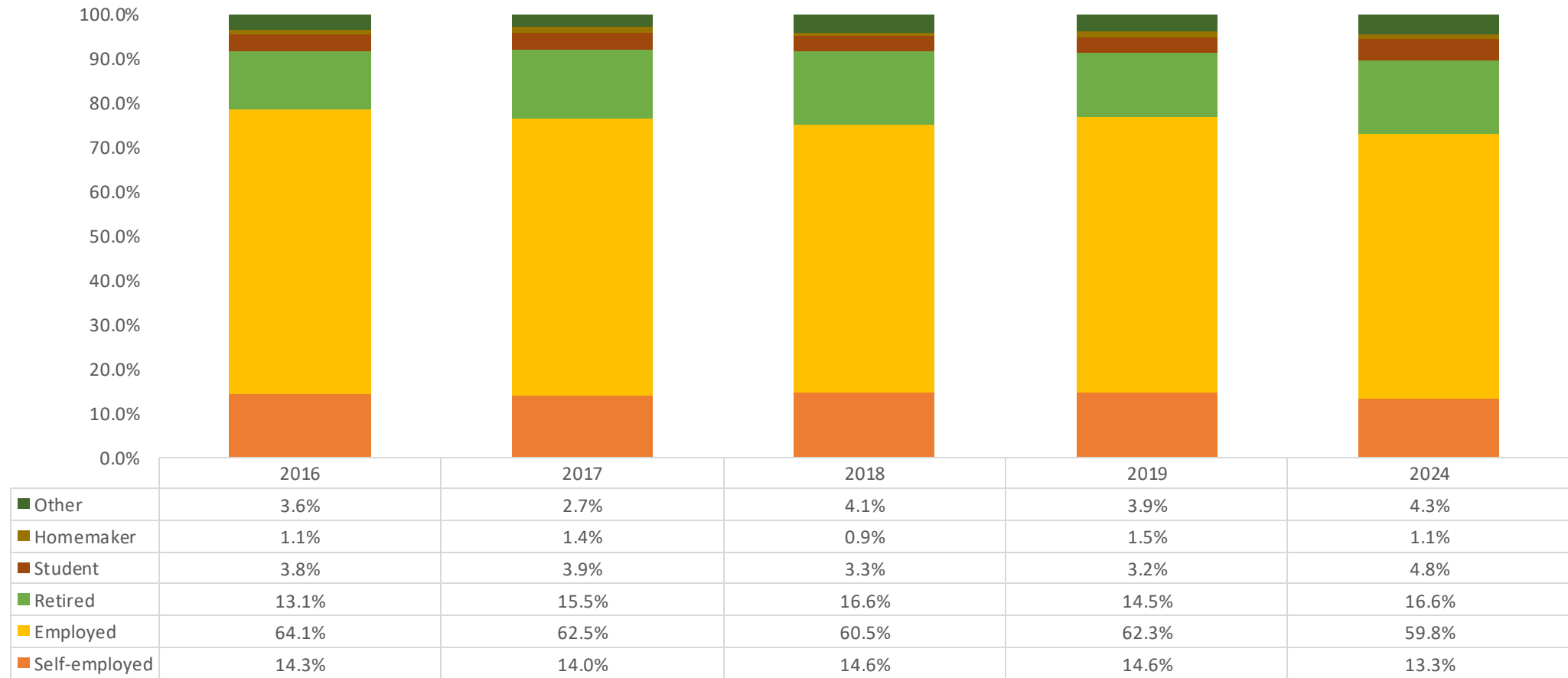
For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

VISITOR PROFILE - AGE - EUROPE



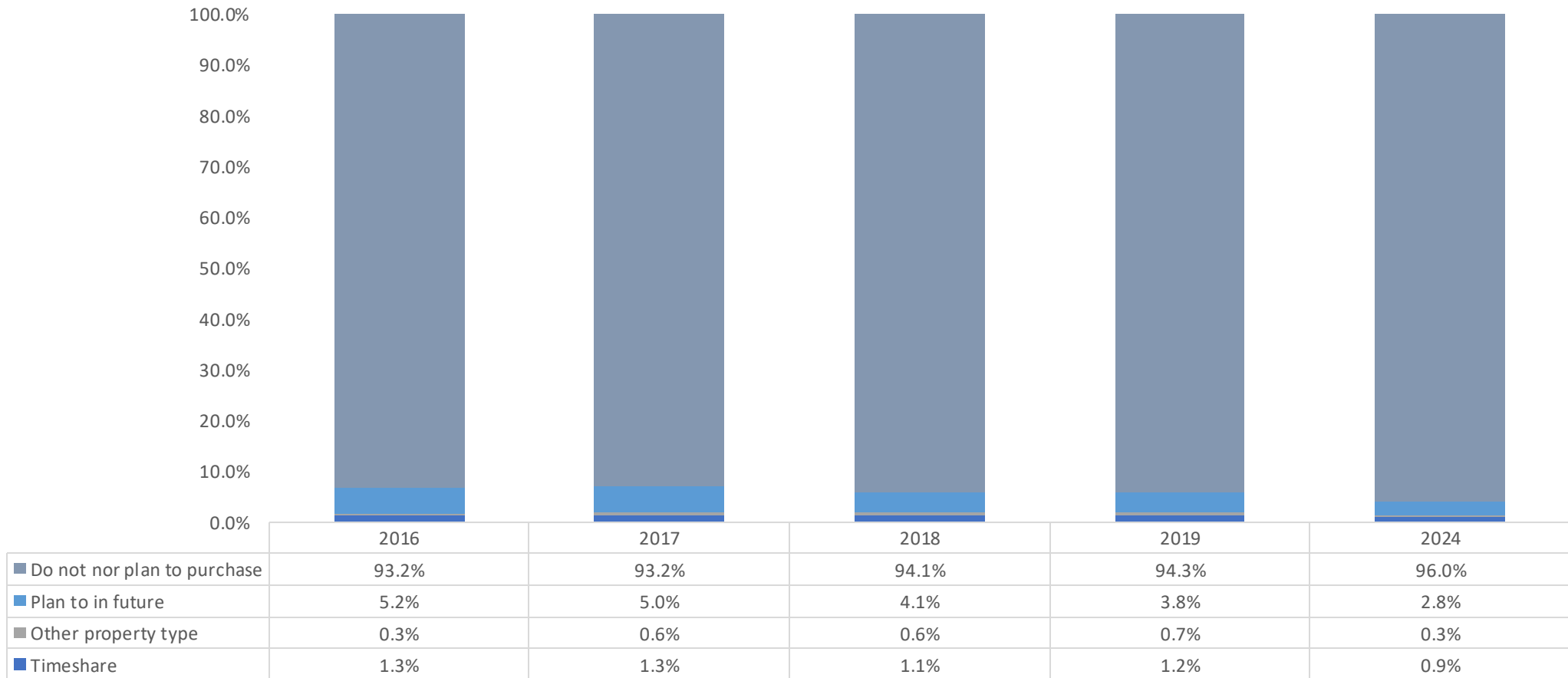
For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

VISITOR PROFILE - EMPLOYMENT STATUS - EUROPE



For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

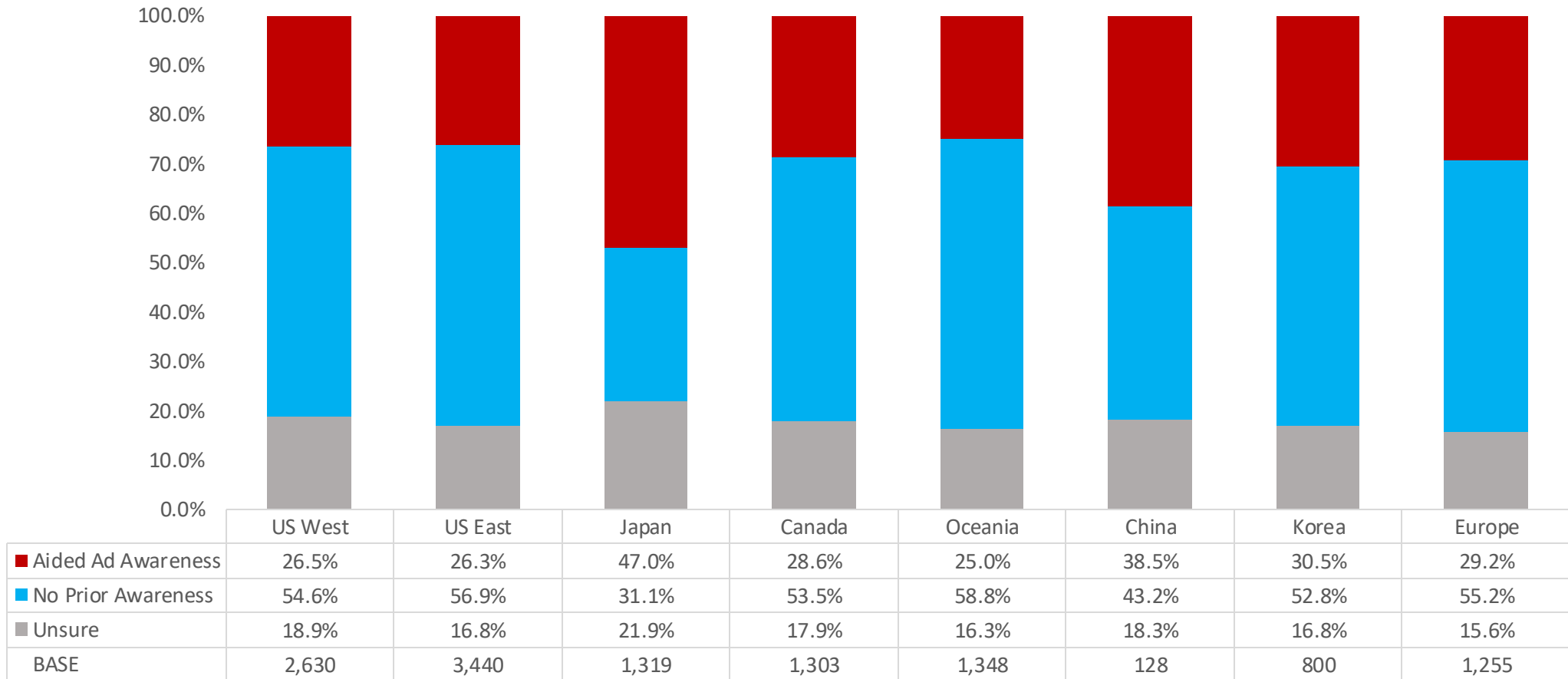
VISITOR PROFILE - HAWAI'I PROPERTY OWNER - EUROPE



For Europe, the pandemic resulted in too few travelers in the second half of 2020. Visitors from Europe were not surveyed in 2021 through 2023.

Section 21 – O'ahu

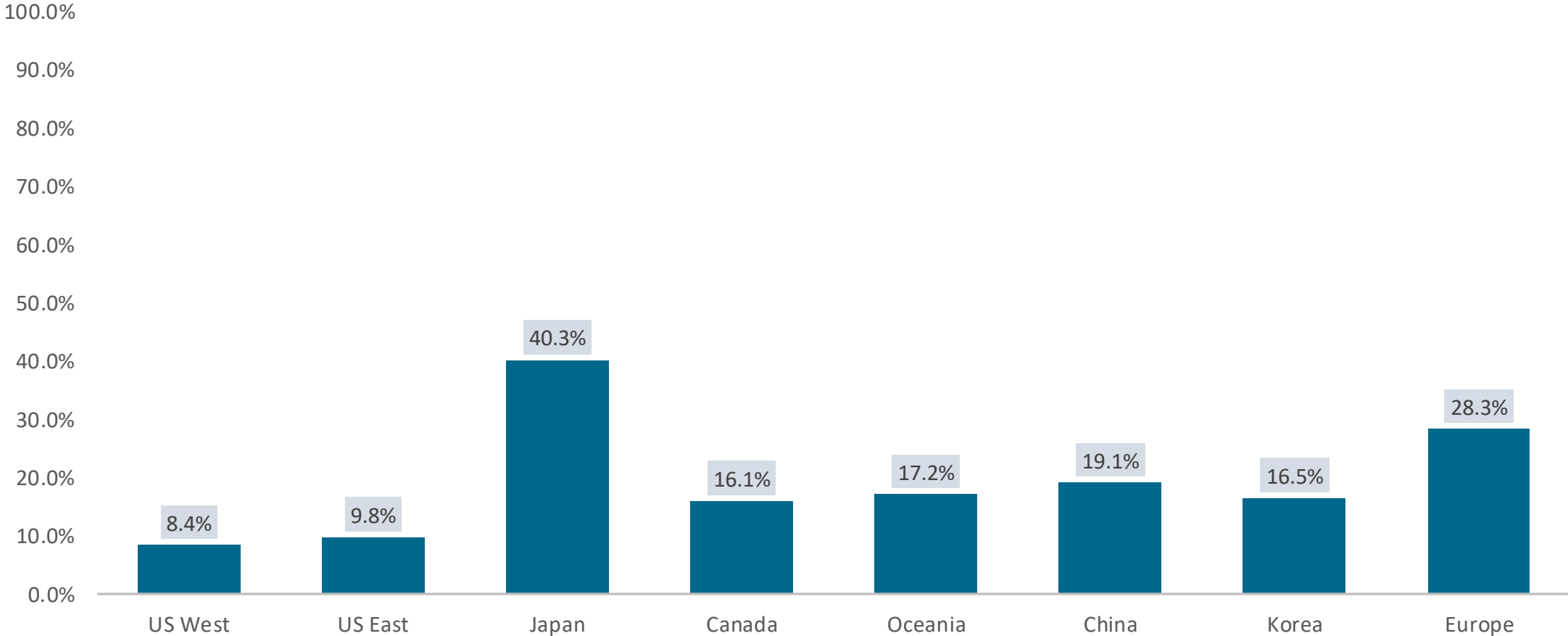
AIDED ADVERTISING AWARENESS - O'AHU



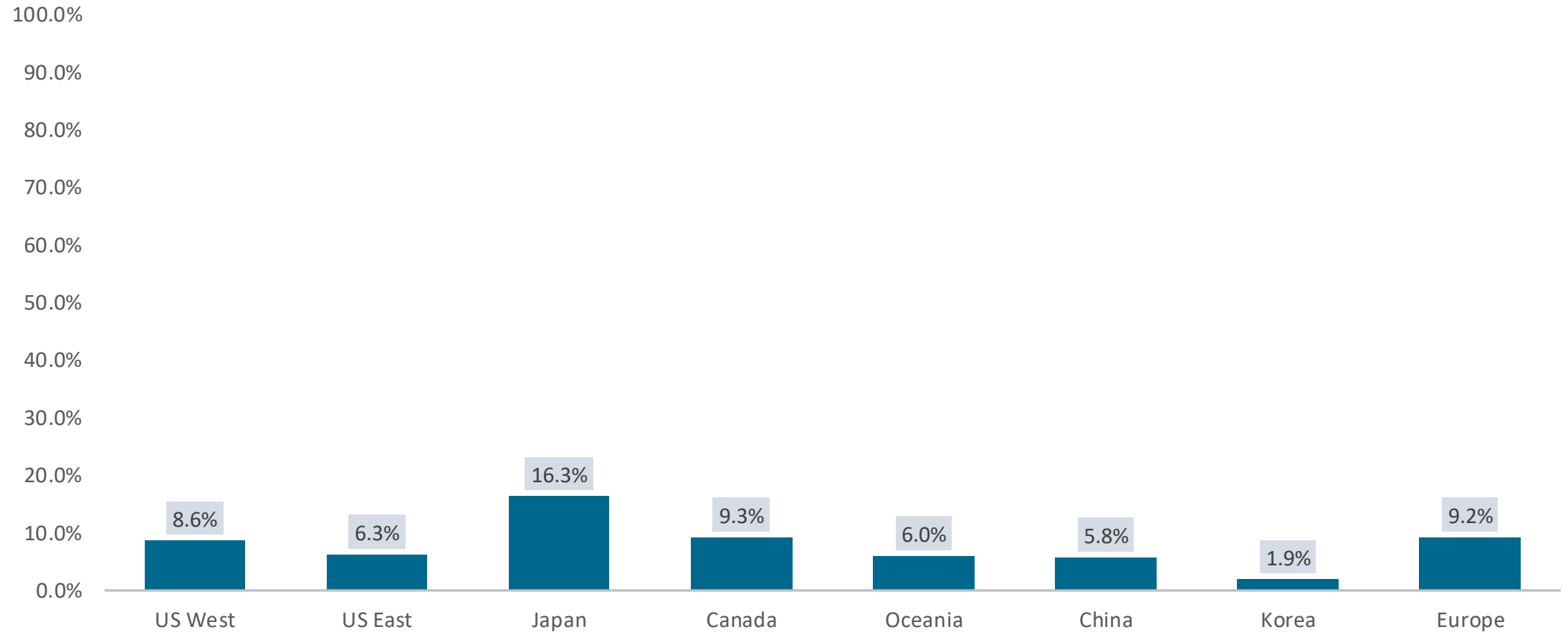
AIDED ADVERTISING AWARENESS - O'AHU

- **Islands visited:** Visitors from **U.S. West, U.S. East, Oceania, Korea, Japan, Europe** and **Canada** who stayed on multiple islands during their trip were more likely to have been exposed to advertising for O'ahu compared to visitors whose trip was limited to only O'ahu.
- **Age:** Advertising awareness for O'ahu was higher among respondents over 50 from **U.S. West, U.S. East** and **Japan**. Young adults under 35 from these markets were the least likely to recall marketing.
- **Trip to Hawai'i:** Repeat visitors from **Japan** and **Korea** were more likely to recall advertising for O'ahu than first-time visitors from these markets.
- **Education:** Visitors from **U.S. West** without a college degree were more likely to recall advertising for O'ahu than college graduates from this market.

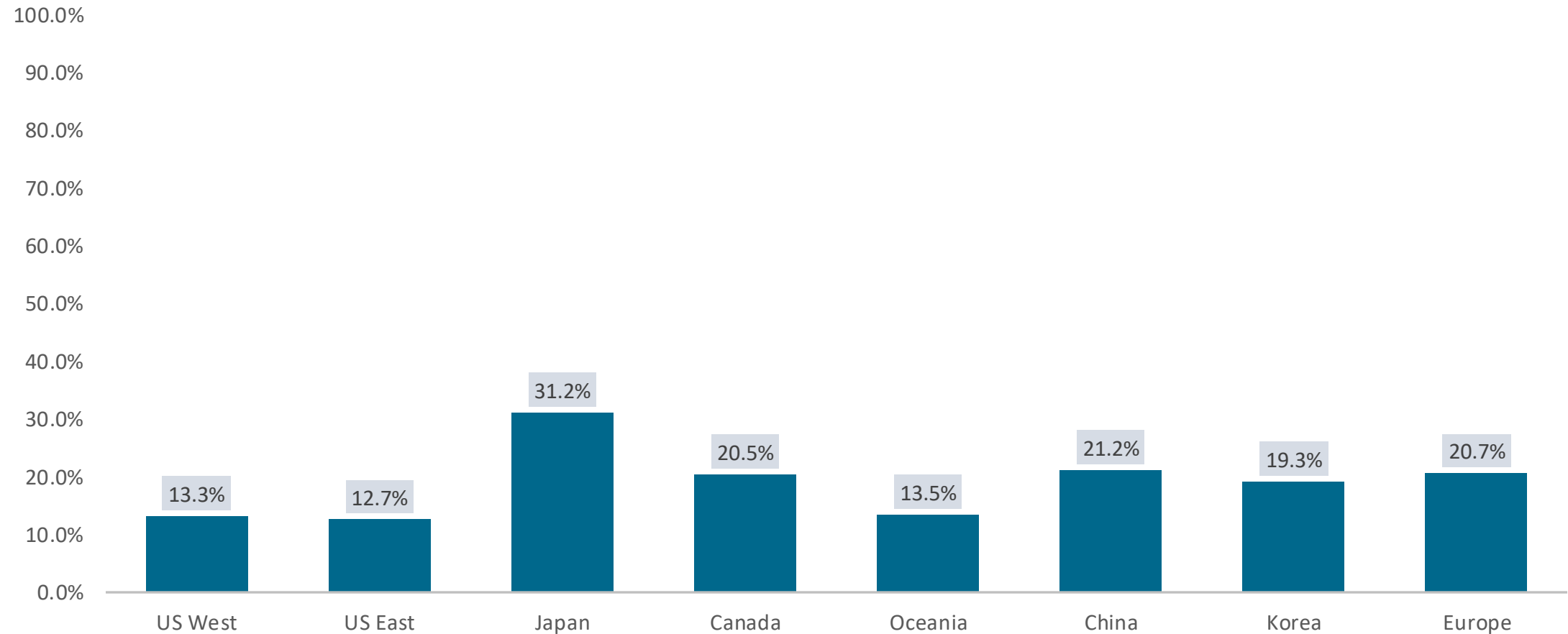
IMPACT OF LOCATION FILMING - O'AHU



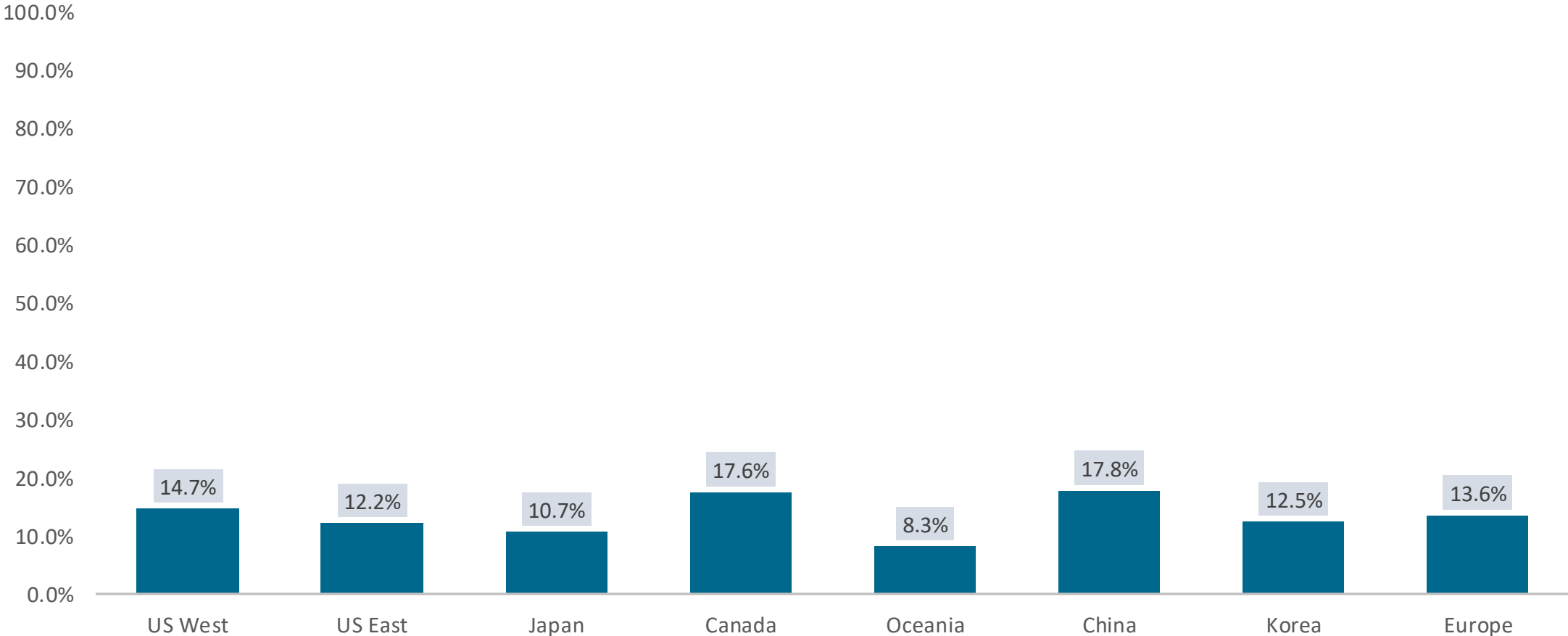
IMPACT OF HAWAIIAN MUSIC - O'AHU



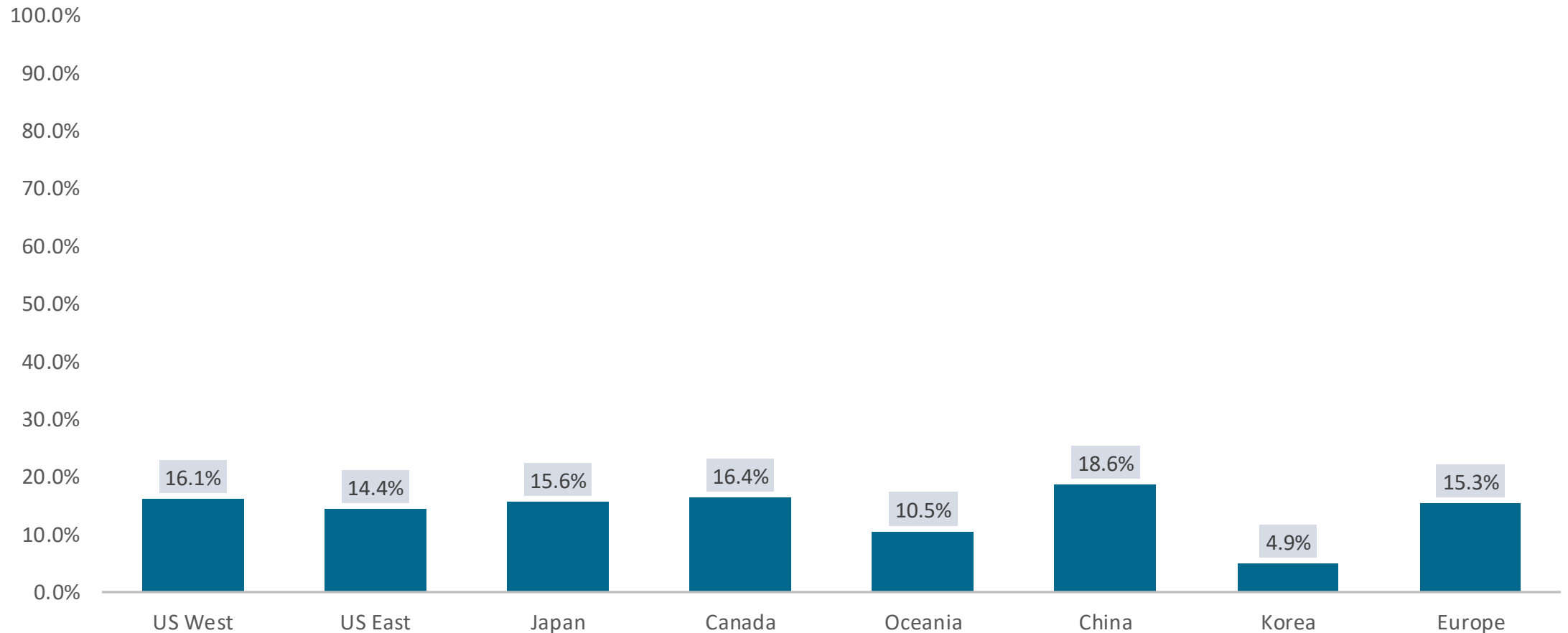
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - O'AHU



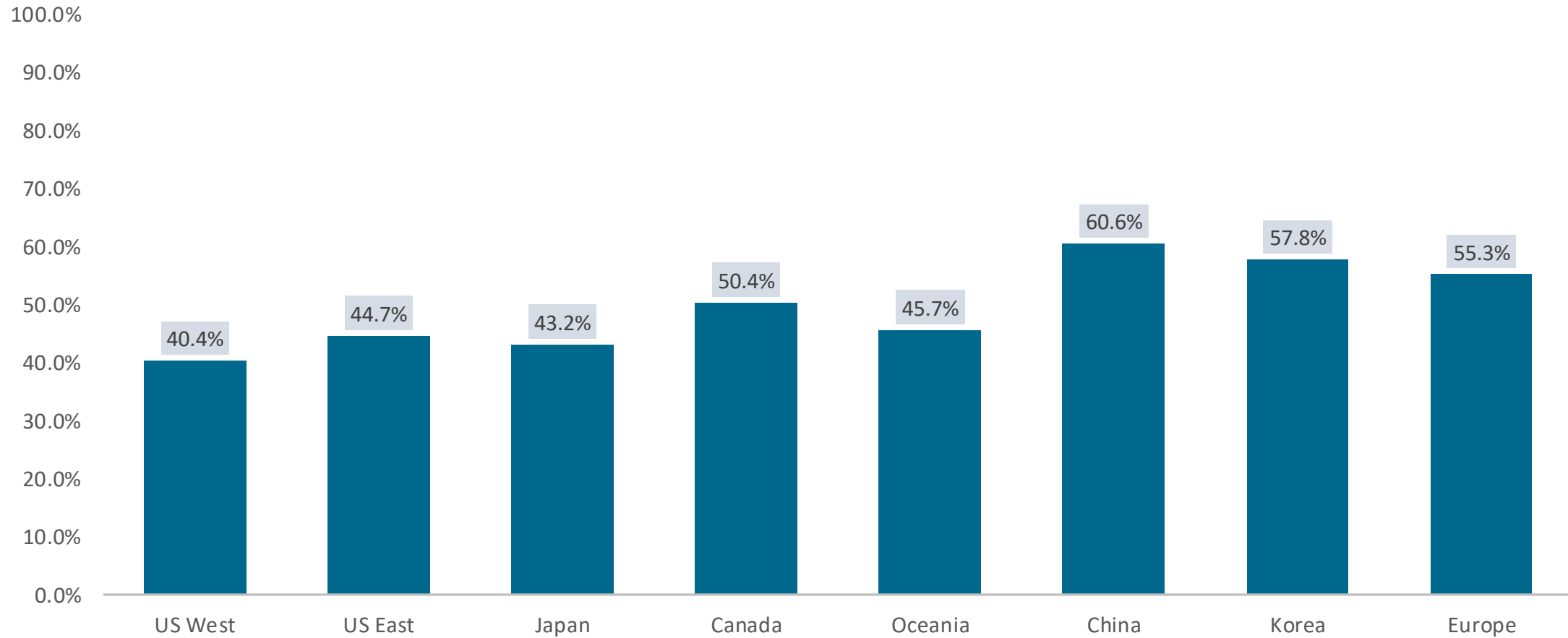
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - O'AHU



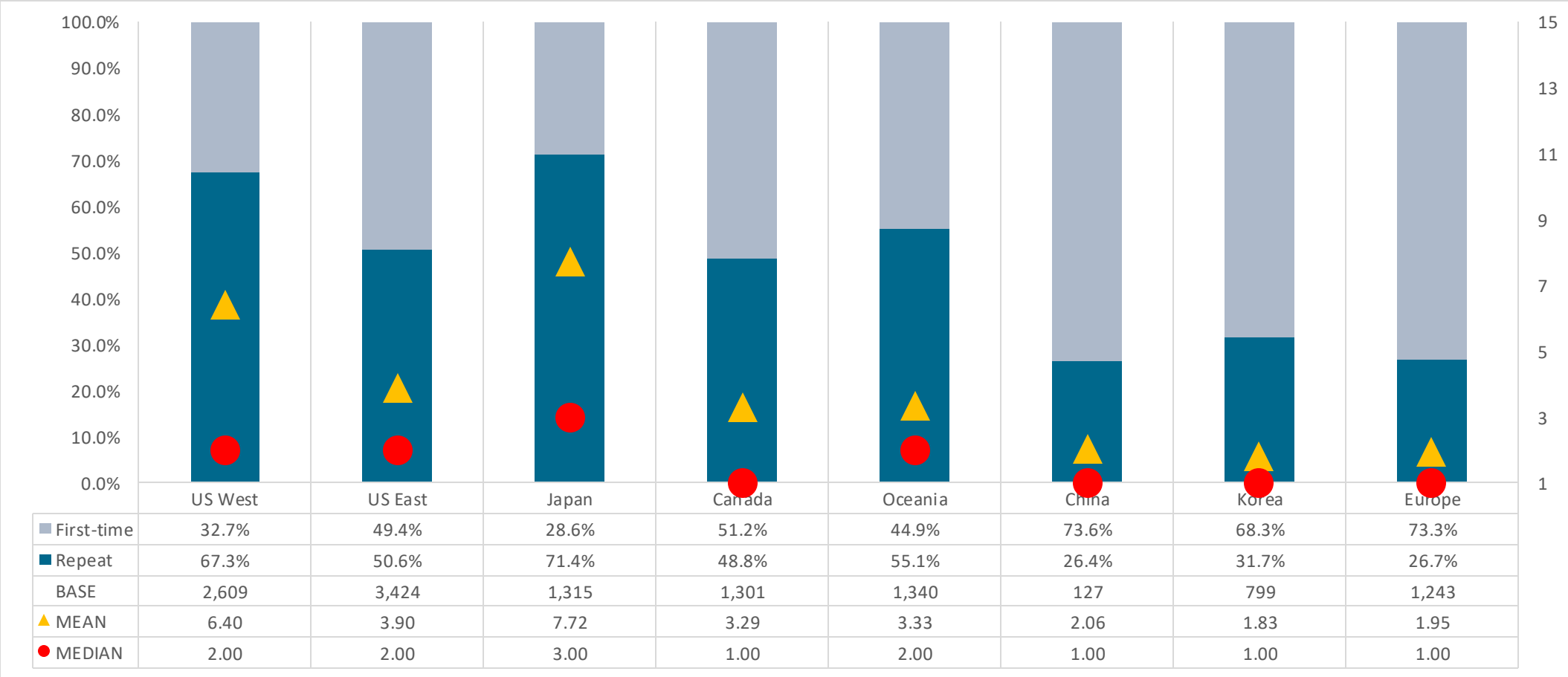
IMPACT OF HAWAIIAN CULTURAL EVENTS - O'AHU



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - O'AHU



1st TIME VS REPEAT VISITOR - O'AHU



1st TIME VS REPEAT VISITOR - O'AHU

- **Gender:** Male visitors from **U.S. West** and **U.S. East** had traveled to O'ahu more often than females from these visitor markets.
- **Age:** Senior visitors 65 and older from **U.S. West, U.S. East, Japan, Korea, Canada** and **Oceania** had visited O'ahu more often than younger visitors.
- **Education:** Among visitors from **U.S. West** and **Canada**, those with a college degree had been to O'ahu more often than those without a college degree.
- **Household income:** Among visitors from **U.S. West** and **U.S. East**, the number of trips to O'ahu increased as respondents became more affluent.
- **Travel party size:** Among visitors from **U.S. West**, those who traveled to O'ahu alone had visited the most often. **Japanese** visitors traveling in pairs had been to O'ahu the most often.

STRENGTHS/ POSITIVE ASPECTS - O'AHU

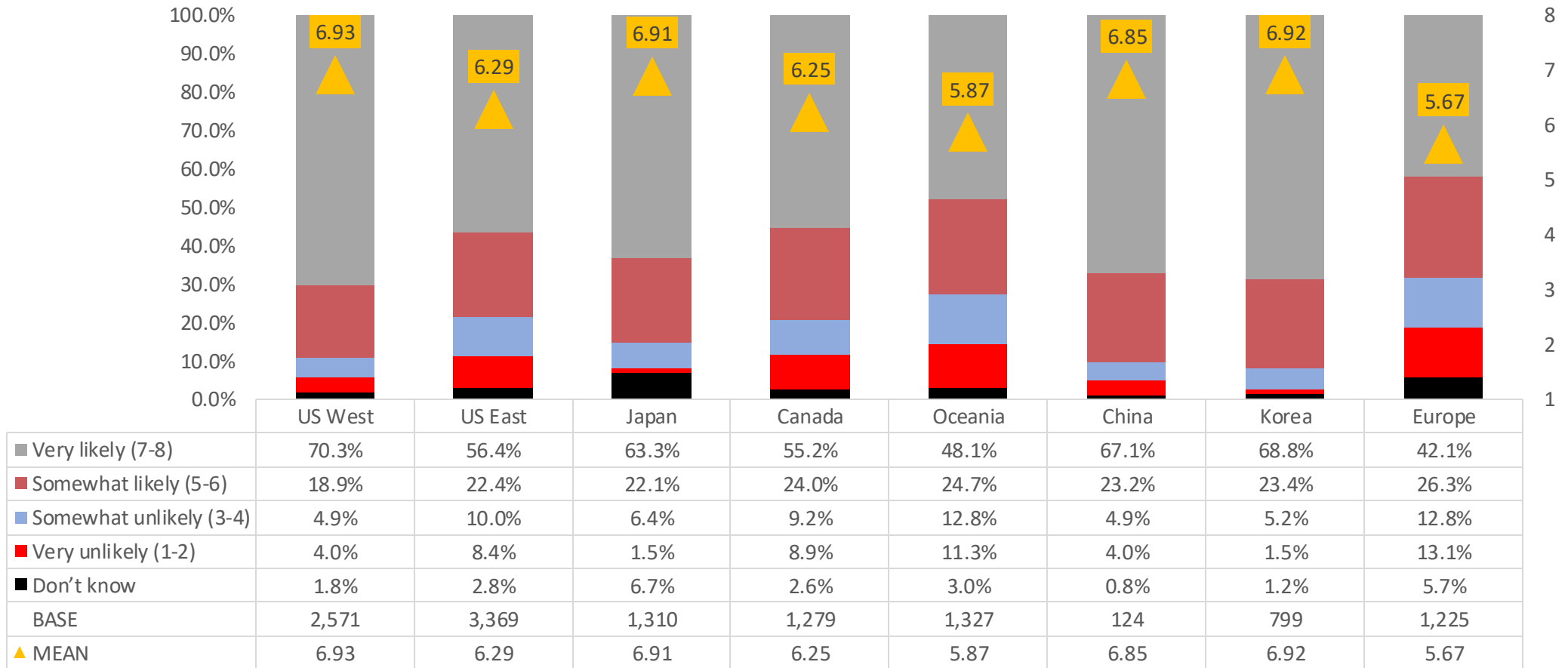
	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
Beach/ ocean	18.3%	12.6%	23.3%	19.2%	17.0%	15.7%	18.8%	14.6%
Variety of activities/ attractions/ many choices	16.1%	18.6%	10.2%	17.7%	13.2%	25.3%	29.7%	15.1%
Nature/ natural beauty/ scenery	10.3%	12.2%	14.9%	12.6%	8.7%	17.8%	19.6%	17.0%
Feeling of the "Aloha Spirit"	9.1%	9.2%	3.9%	12.8%	11.1%	3.9%	3.0%	15.5%
Friendliness of the local people	6.8%	7.5%	4.3%	7.4%	11.6%	7.5%	6.9%	11.2%
Events/ celebrations with friends/ family	7.2%	6.5%	2.5%	2.9%	2.4%	2.4%	1.5%	2.2%
Food/ restaurant/ good service	6.4%	4.8%	6.0%	4.9%	3.6%	7.7%	0.4%	2.9%
Local culture/ people/ music	4.8%	3.8%	3.0%	3.7%	3.4%	2.8%	3.2%	3.5%
Accommodations/ was as promised	2.0%	3.4%	8.8%	2.7%	3.8%	0.0%	0.9%	1.2%
Overall customer service/ hospitality/ the people	3.1%	3.7%	2.8%	3.1%	5.2%	0.8%	1.5%	2.5%
Military historical sites	2.2%	5.1%	0.7%	1.5%	3.8%	0.8%	0.2%	3.7%
Food/ restaurant variety/ dining options	2.6%	1.8%	1.1%	2.2%	1.7%	0.9%	0.9%	1.1%
Shopping	0.5%	0.7%	8.0%	0.8%	2.6%	4.1%	3.3%	0.5%

AREAS OF OPPORTUNITIES - O'AHU

	US West	US East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	37.4%	35.8%	33.1%	36.1%	38.8%	29.1%	33.4%	38.3%
Traffic (congested/ slow)	21.2%	23.3%	7.4%	15.0%	7.8%	9.9%	4.7%	9.9%
Would like to experience more local culture	5.8%	5.9%	5.1%	7.0%	6.0%	3.2%	6.3%	9.1%
Cost/ expensive (specific/ non-specific)	4.0%	4.1%	5.7%	8.1%	7.4%	2.3%	6.9%	5.1%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	2.6%	2.6%	14.4%	3.5%	3.7%	6.5%	4.2%	6.5%
Driving experience (signage, road surface, traffic violations, bad drivers)	4.4%	3.8%	3.3%	2.8%	2.2%	4.4%	1.1%	2.9%
Food/ restaurant variety/ dining options	2.7%	2.6%	2.5%	3.4%	4.5%	5.7%	6.7%	4.2%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	2.7%	2.2%	3.7%	2.4%	1.5%	3.2%	5.4%	1.5%
Homelessness	2.9%	3.3%	0.9%	3.1%	2.4%	0.8%	2.3%	2.5%
Food/ restaurant quality	2.3%	1.7%	4.7%	1.5%	3.3%	5.3%	6.8%	3.1%
Accommodations/ cleanliness/ upkeep	1.7%	2.5%	2.6%	3.4%	2.9%	0.9%	6.4%	2.3%

LIKELIHOOD OF RETURN VISIT - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

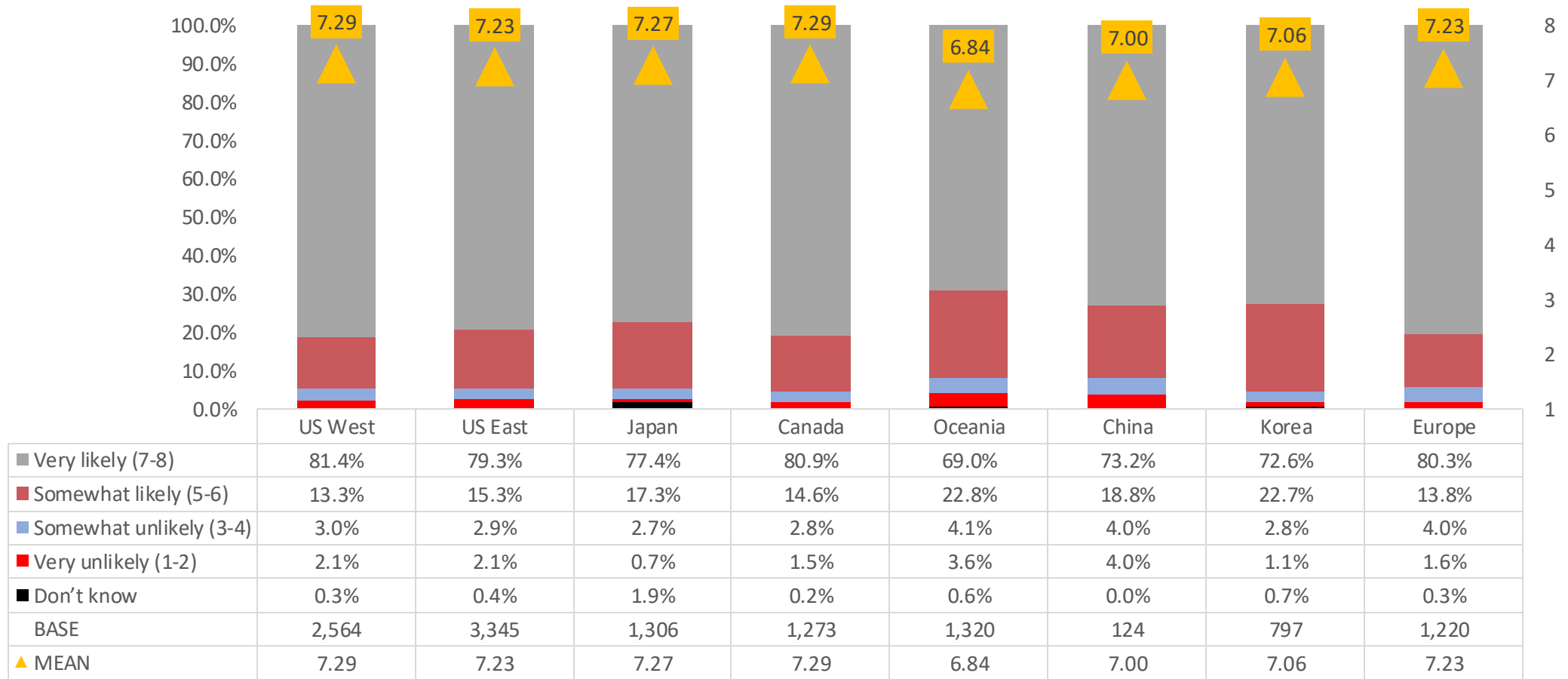
- **Education:** **U.S. East** visitors without a college degree expressed a higher likelihood of returning to O'ahu in the next five years compared to those with a college degree.
- **Age:** Visitors from **U.S. West** and **Japan** between the ages of 50-64 were the most likely to return to O'ahu in the next five years. Seniors (65+) from **U.S. East** were the least likely to indicate a possible return.
- **Islands visited:** Among visitors from **U.S. West** and **Canada**, those who only visited O'ahu showed a greater likelihood of returning to the island than those who visited multiple islands during their trip.
- **Travel party size:** Visitors who came to O'ahu in smaller travel parties (ranging from one to sometimes two individuals) from **U.S. East** were the most likely to return in the next five years compared to those from this visitor market who traveled here with at least one other individual.

REASONS FOR NOT RETURNING - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Too expensive/ cost	36.6%	40.7%	64.5%	53.9%	46.0%	43.1%	68.1%	51.1%
Want to go someplace new	40.2%	38.9%	24.1%	42.0%	37.8%	7.9%	28.2%	29.1%
Too crowded/ congested/ traffic	30.4%	23.3%	1.5%	18.7%	12.6%	17.6%	6.1%	12.5%
Too commercial/ overdeveloped	22.8%	20.5%	6.8%	15.9%	18.0%	7.9%	7.6%	16.5%
Flight too long	5.8%	27.4%	13.0%	20.7%	13.4%	7.9%	22.1%	53.5%
Not enough value for the price	16.7%	13.5%	5.7%	18.1%	25.6%	45.0%	25.1%	13.3%
No reason to return/ nothing new	16.7%	10.7%	7.4%	12.1%	15.9%	9.7%	9.5%	7.3%
Other financial obligations	6.2%	9.7%	23.5%	9.2%	7.8%	0.0%	15.2%	10.3%
Poor health/ age restriction	2.5%	4.6%	4.2%	5.3%	10.2%	0.0%	0.0%	4.4%
Unfriendly people/ felt unwelcome	4.0%	3.2%	0.0%	1.9%	2.4%	31.5%	3.0%	2.9%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	1.5%	2.1%	1.1%	4.7%	3.1%	15.7%	0.0%	3.1%

BRAND/ DESTINATION ADVOCACY - O'AHU

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

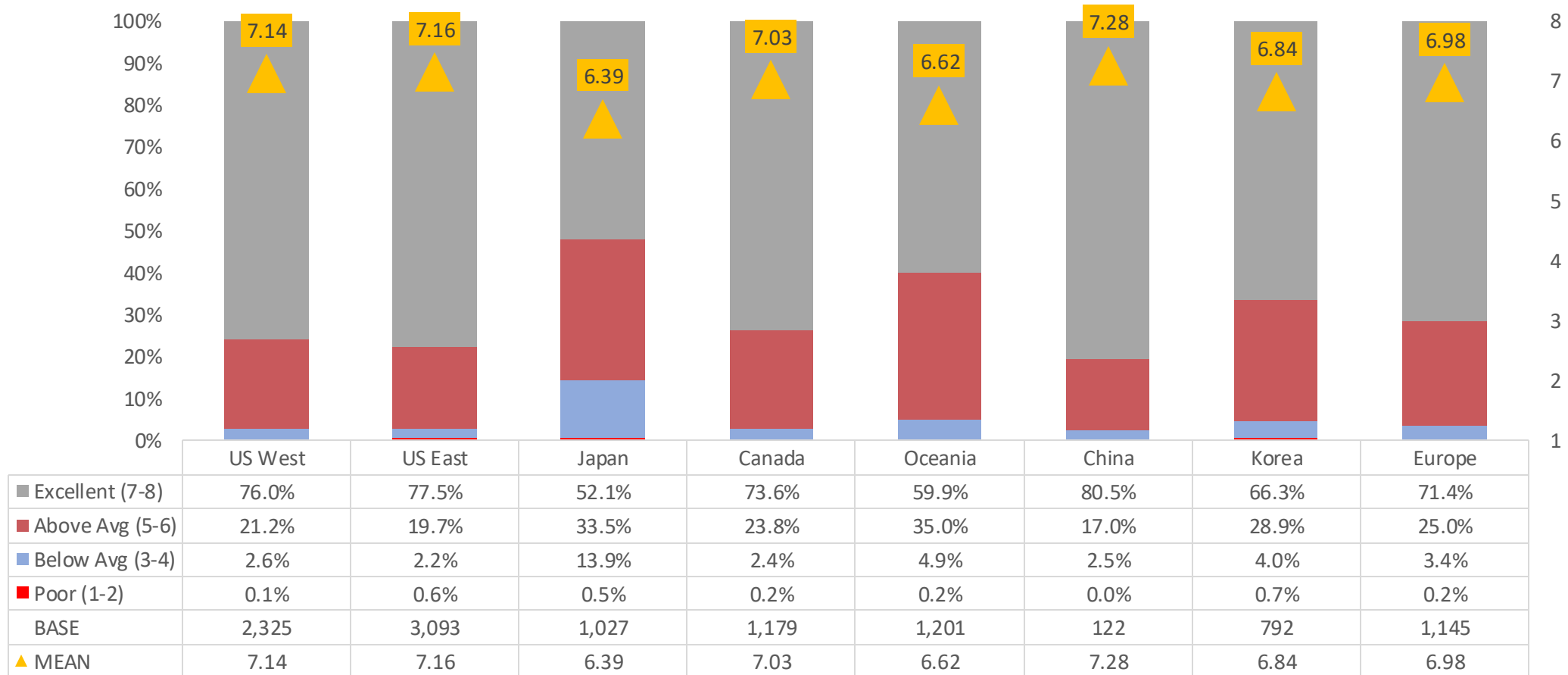


BRAND/ DESTINATION ADVOCACY - O'AHU

- **Islands visited:** Visitors from **U.S. West** and **U.S. East**, who only stayed on O'ahu, were more likely to recommend the island to others compared to those who visited multiple islands during their trip.
- **Age:** **U.S. West**, **U.S. East** and **Japan** visitors under the age of 35 were the strongest advocates for O'ahu compared to older visitors from these markets.
- **Gender:** Female visitors from **U.S. West**, **U.S. East**, and **Japan** were more likely to recommend O'ahu compared to male visitors from these markets.
- **Household income:** Among **U.S. West** visitors, those residing in homes with a combined income of less than \$100K were the most likely to recommend O'ahu compared to more affluent visitors.
- **Education:** Those visitors without a college degree from **U.S. East** were stronger advocates for the state than those who were college graduates from this visitor market.

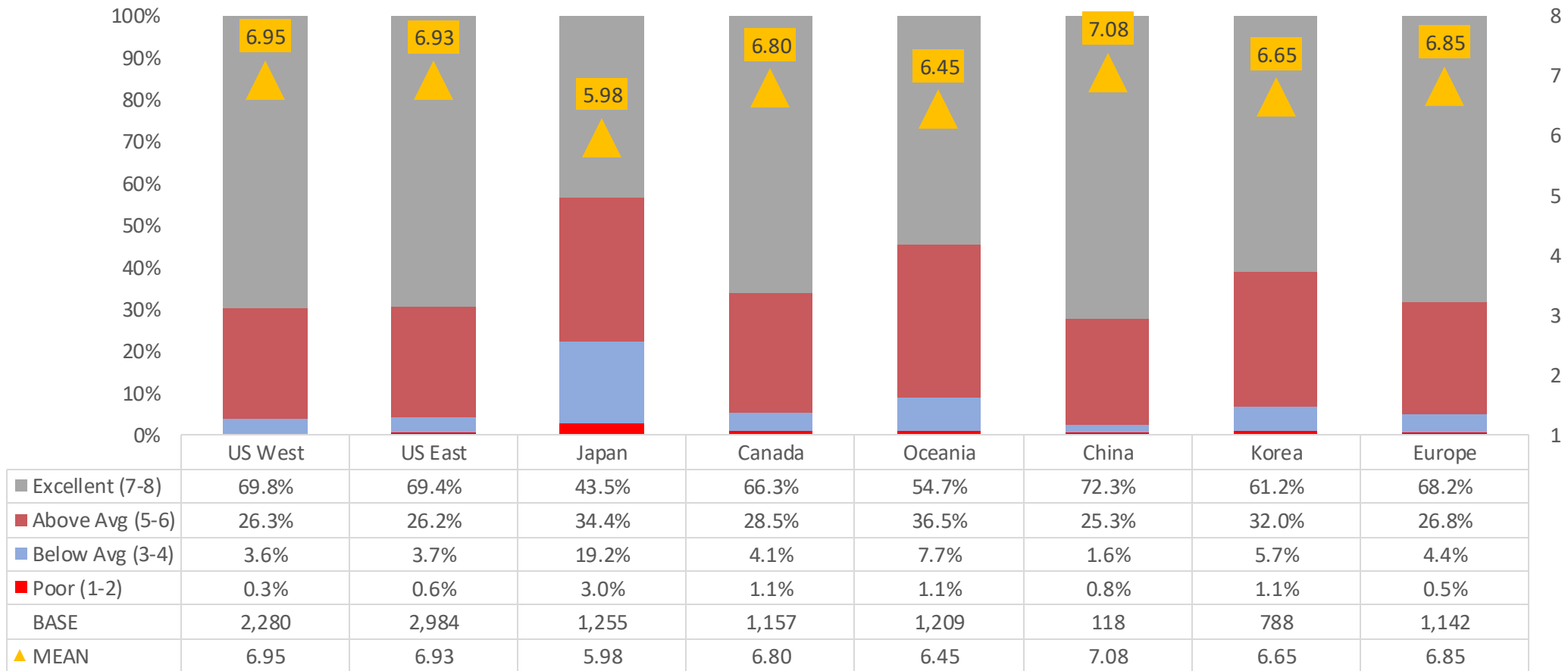
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



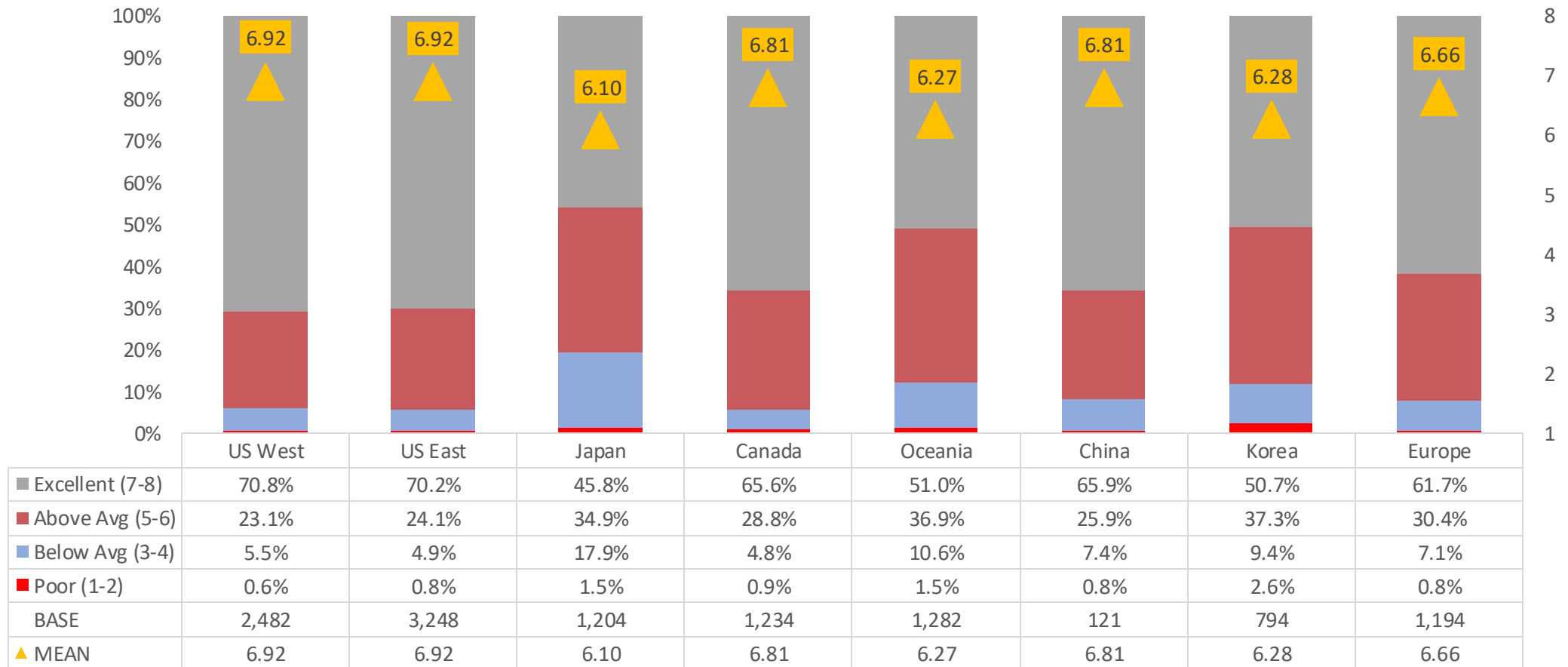
SHOPPING - O'AHU

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



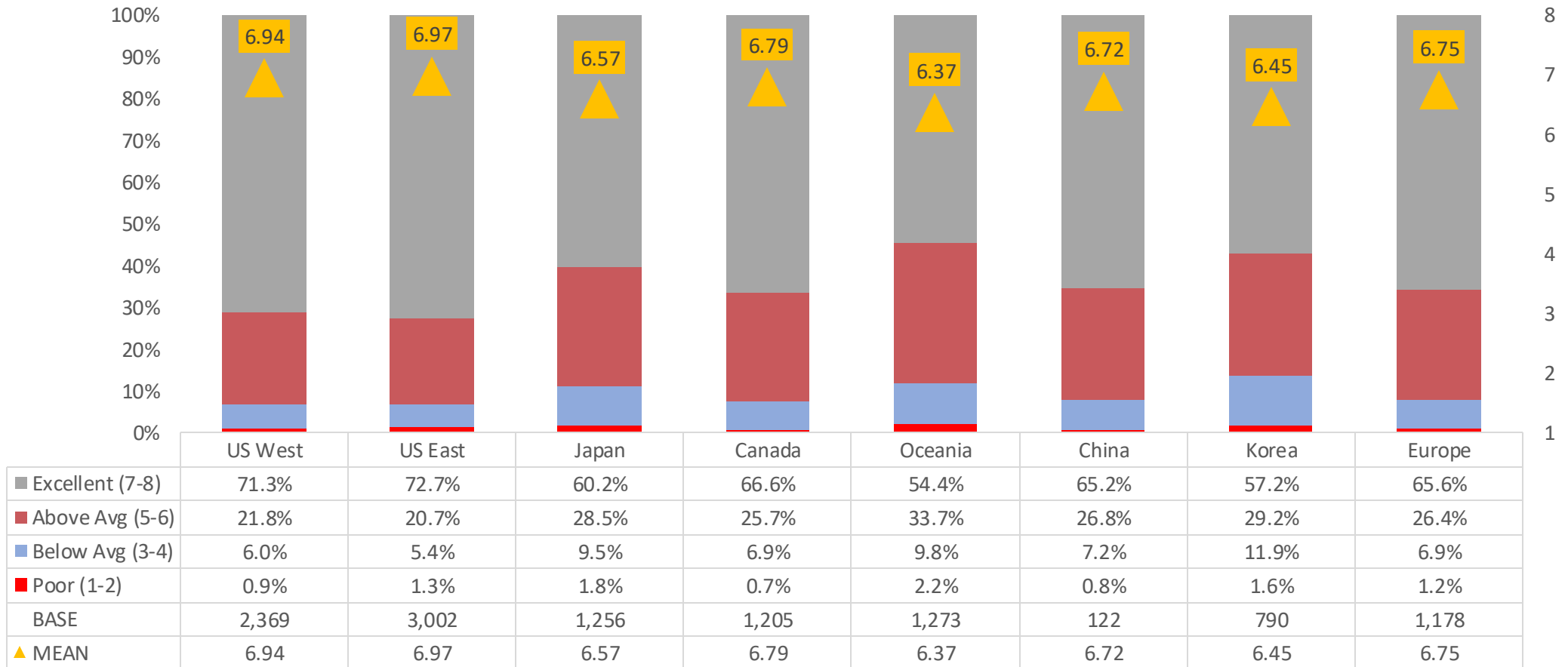
DINING/ FOOD & BEVERAGE - O'AHU

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



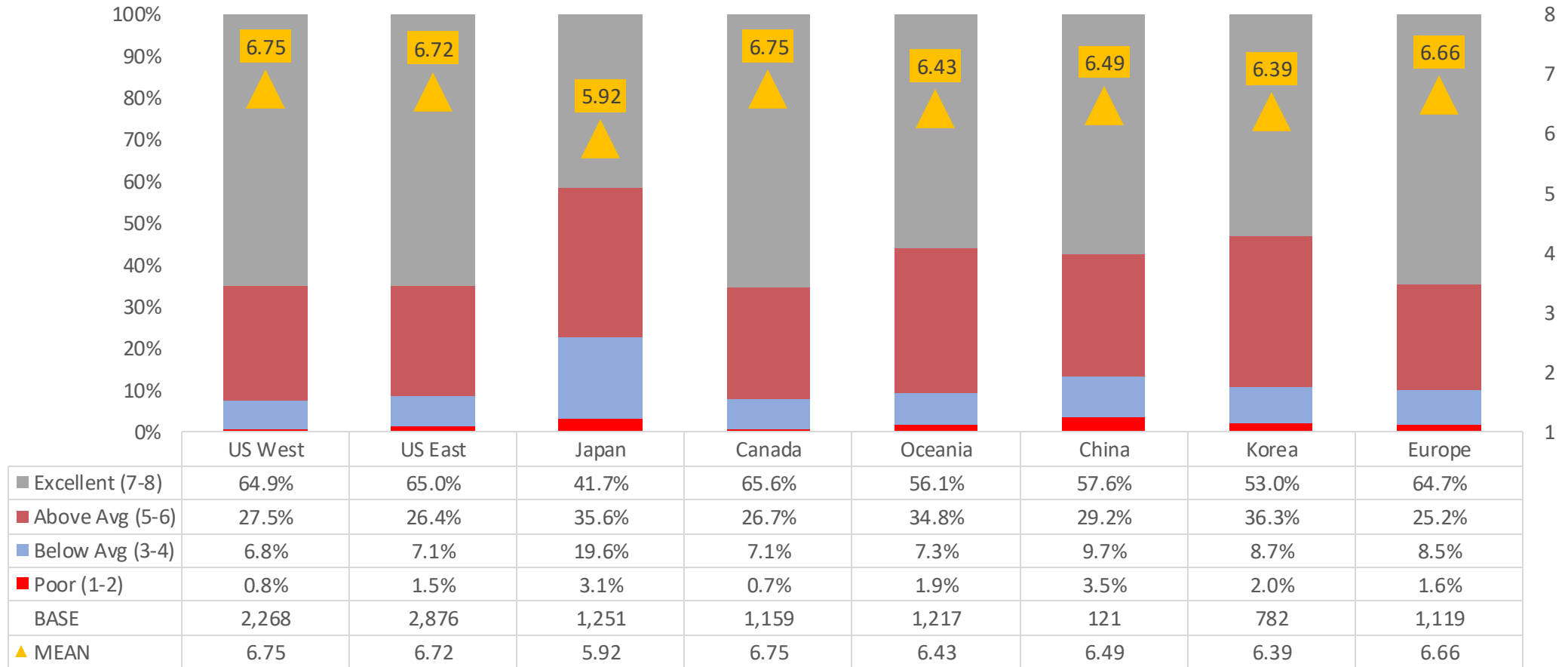
LODGING/ ACCOMMODATIONS - O'AHU

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



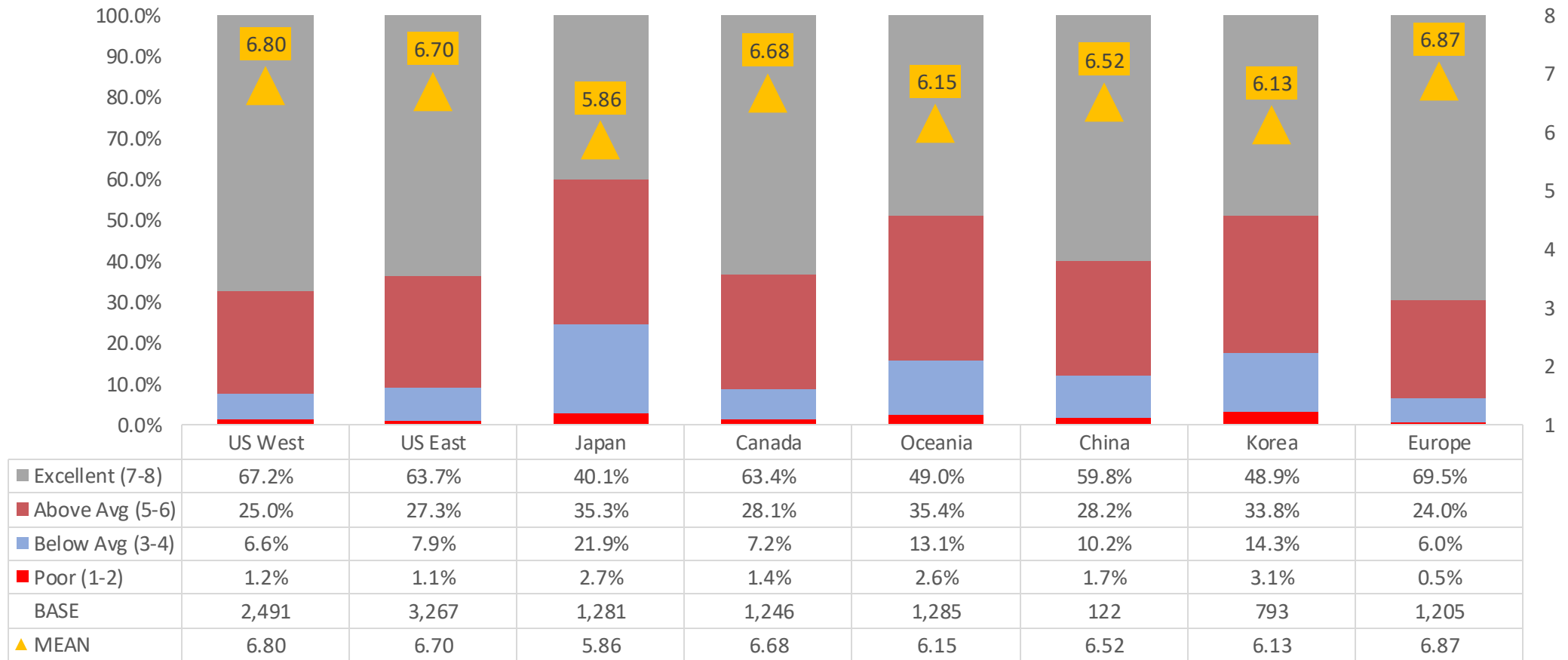
TRANSPORTATION ON ISLAND - O'AHU

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



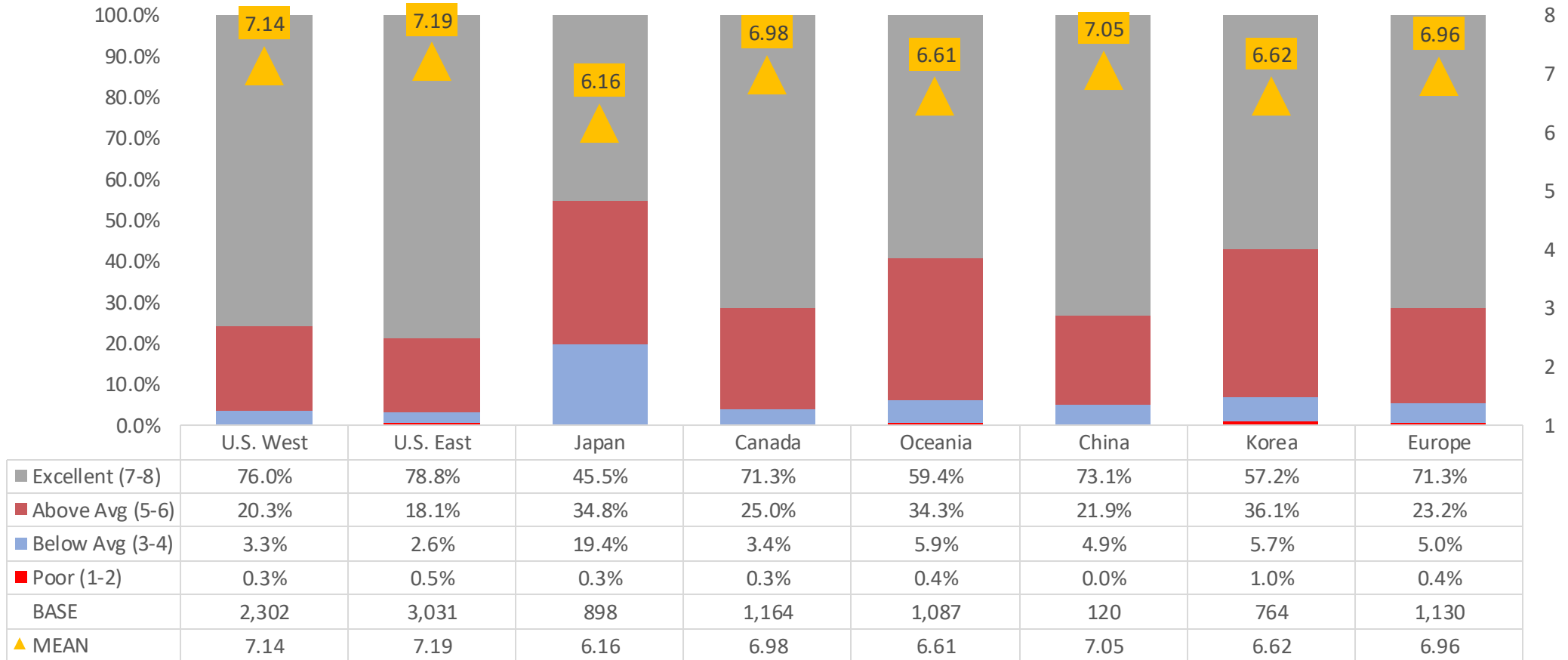
AIRPORT - O'AHU

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



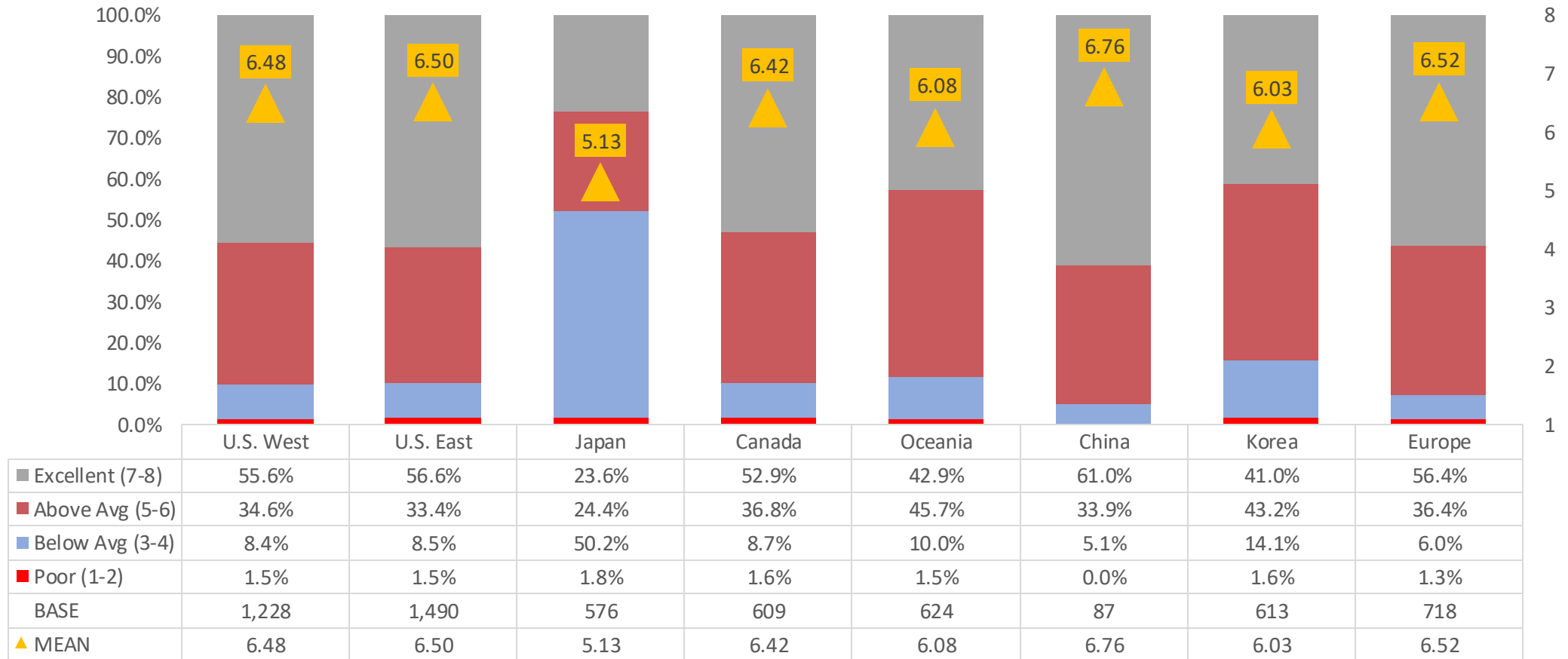
CULTURAL EXPERIENCES - O'AHU

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



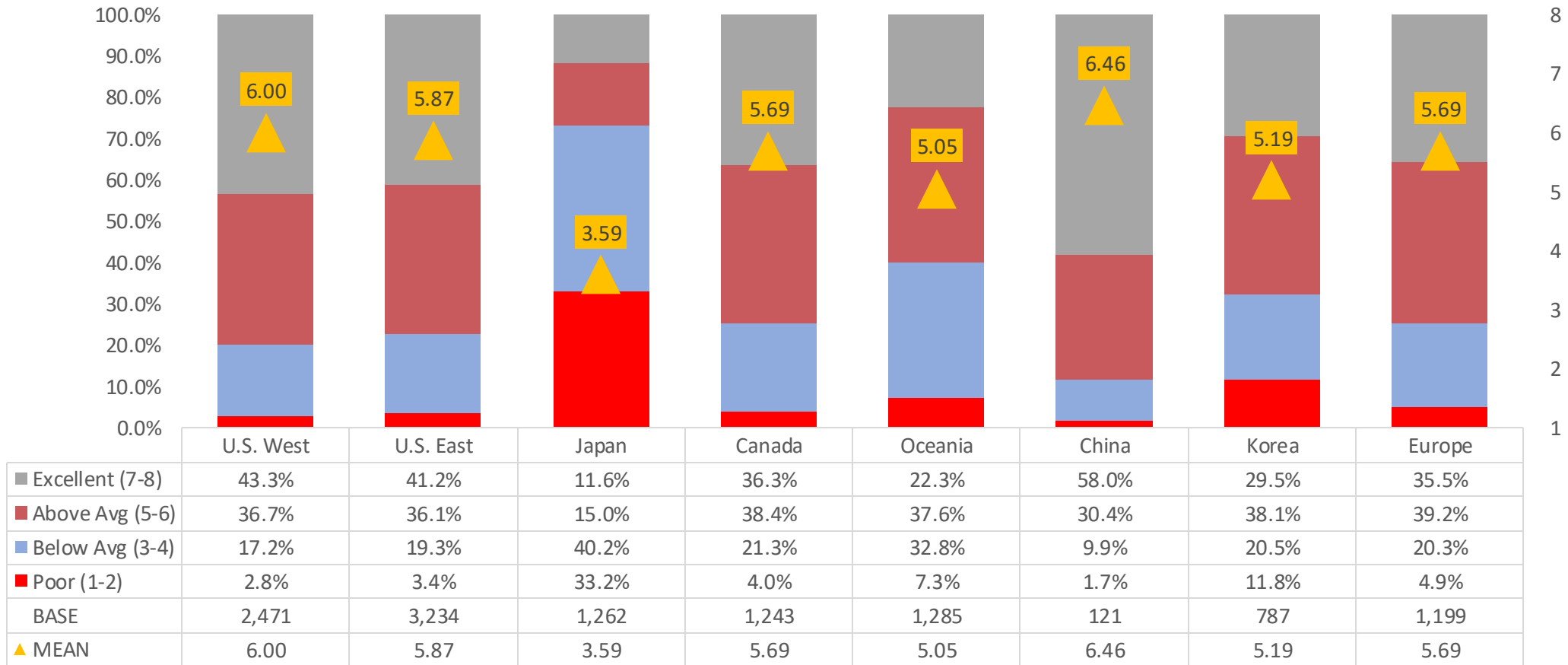
VOLUNTEER EXPERIENCES - O'AHU

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



OVERALL VALUE FOR THE MONEY - O'AHU

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



O'AHU ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.0%	97.6%	97.0%	97.0%	91.7%	99.0%	98.8%	97.8%
On own (self-guided)/ driving around the island	78.4%	76.7%	72.1%	75.9%	45.0%	67.7%	81.8%	66.6%
Helicopter ride/ airplane tour	1.2%	2.0%	0.4%	1.3%	1.7%	0.8%	4.1%	4.9%
Boat tour/ submarine ride/ whale watching	17.3%	21.8%	8.7%	18.6%	16.6%	29.9%	32.0%	18.2%
Visiting towns/ communities	43.8%	45.8%	35.8%	47.2%	26.0%	25.9%	38.2%	39.2%
Private limousine/ van tour/ tour bus	10.4%	16.6%	14.0%	16.1%	31.8%	12.9%	12.2%	21.0%
Scenic views/ natural landmarks	52.1%	62.4%	21.3%	63.6%	49.6%	74.9%	61.2%	59.2%
Movie and TV filming location tours	8.8%	11.2%	5.9%	13.5%	9.5%	17.2%	25.8%	15.0%

O'AHU ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.1%	93.9%	95.4%	97.3%	92.3%	98.4%	98.3%	96.6%
Beach/ sunbathing	82.6%	81.0%	74.8%	88.0%	77.0%	86.3%	86.8%	85.4%
Bodyboarding	6.9%	4.6%	0.8%	8.3%	3.5%	6.7%	3.5%	5.8%
Stand up paddle boarding	4.3%	3.9%	2.5%	3.9%	3.0%	5.1%	4.3%	4.2%
Surfing	6.5%	6.1%	3.0%	10.7%	7.6%	7.7%	12.2%	15.2%
Canoe paddling	1.2%	1.1%	0.5%	1.3%	0.6%	2.4%	3.1%	1.2%
Kayaking	2.8%	2.8%	1.0%	2.4%	1.0%	5.7%	4.7%	1.4%
Swimming in the ocean	57.9%	56.6%	38.4%	69.2%	60.2%	42.7%	53.8%	66.6%
Snorkeling	29.3%	27.8%	11.7%	35.3%	21.1%	33.9%	53.4%	30.3%
Freediving	1.6%	0.9%	0.2%	1.3%	0.9%	8.9%	1.4%	1.2%
Windsurfing/ kitesurfing	0.2%	0.2%	0.1%	0.0%	0.1%	0.0%	0.6%	0.6%
Jet skiing/ parasailing	1.7%	2.0%	2.8%	1.8%	0.7%	3.2%	1.9%	0.8%
Scuba diving	1.4%	1.3%	1.2%	1.6%	0.6%	3.0%	1.0%	2.0%
Fishing	1.9%	2.0%	0.3%	1.1%	0.8%	5.9%	0.8%	0.5%
Golf	3.4%	3.0%	4.3%	3.4%	1.8%	1.0%	4.5%	1.9%

O'AHU ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.1%	93.9%	95.4%	97.3%	92.3%	98.4%	98.3%	96.6%
Running/ jogging/ fitness walking	26.1%	26.5%	26.8%	30.0%	24.1%	22.8%	20.5%	19.6%
Cycling	1.7%	1.8%	3.5%	2.2%	1.5%	3.6%	2.2%	2.3%
Spa	6.5%	8.1%	4.1%	5.4%	5.3%	0.8%	6.5%	3.5%
Hiking	34.4%	39.5%	21.6%	43.2%	17.2%	42.8%	23.4%	41.6%
Backpacking/ camping	0.7%	0.9%	0.2%	0.8%	0.1%	4.8%	1.0%	0.9%
Agritourism	11.0%	12.9%	7.6%	12.3%	5.6%	15.5%	18.8%	10.5%
Sports event or tournament	2.9%	2.5%	1.4%	3.2%	1.3%	1.0%	1.3%	2.7%
Parks/ botanical gardens	32.5%	37.7%	24.1%	40.1%	26.5%	33.3%	26.0%	37.1%
Waterparks	2.4%	1.6%	1.9%	2.0%	1.0%	4.4%	2.8%	0.9%
Mountain tubing/ waterfall rappel	0.4%	0.6%	0.3%	0.4%	0.2%	1.0%	0.5%	2.4%
Zip-lining	2.5%	3.4%	0.5%	1.5%	0.9%	2.4%	0.5%	1.2%
Skydiving	0.3%	0.7%	1.3%	0.7%	0.0%	6.7%	1.6%	0.9%
All-terrain vehicle (ATV)	4.1%	4.9%	1.4%	4.7%	3.3%	3.6%	10.7%	2.8%
Horseback riding	1.0%	1.9%	2.2%	1.1%	0.5%	7.3%	1.0%	1.5%

O'AHU ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.7%	97.6%	98.3%	98.5%	98.3%	96.6%	99.4%	98.5%
Lunch/ sunset/ dinner/ evening cruise	20.7%	23.8%	13.5%	23.4%	16.6%	56.8%	33.1%	26.0%
Live music/ stage show	30.8%	33.4%	18.2%	33.4%	22.2%	21.8%	17.0%	31.4%
Nightclub/ dancing/ bar/ karaoke	9.4%	8.7%	2.4%	9.2%	5.8%	1.8%	3.1%	8.9%
Fine dining	41.9%	41.6%	37.1%	38.2%	29.6%	39.8%	52.6%	28.1%
Family restaurant	60.6%	56.6%	26.3%	64.3%	67.3%	23.1%	47.7%	46.8%
Fast food	40.8%	37.7%	54.2%	53.4%	54.4%	46.6%	60.5%	52.4%
Food truck	46.7%	44.6%	27.7%	52.6%	34.0%	33.4%	64.7%	46.5%
Café/ coffee house	50.1%	45.8%	58.4%	56.5%	61.4%	47.9%	68.1%	54.0%
Ethnic dining	29.5%	32.9%	7.8%	26.0%	13.9%	23.6%	26.6%	14.4%
Farm-to-table cuisine	13.8%	14.0%	15.6%	11.1%	3.0%	5.3%	2.6%	6.8%
Prepared own meal	29.2%	25.4%	28.3%	35.8%	21.3%	11.3%	14.8%	28.7%

O'AHU ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.6%	94.1%	97.9%	97.0%	95.9%	96.0%	98.3%	96.6%
Malls/ department stores	55.7%	51.6%	85.6%	71.7%	75.0%	68.5%	84.5%	68.6%
Designer boutiques	16.8%	16.4%	16.4%	18.9%	15.1%	12.4%	4.3%	14.4%
Hotel/ resort stores	38.9%	41.0%	34.2%	37.5%	33.6%	27.1%	35.4%	30.3%
Swap meet/ flea market	19.2%	16.8%	3.4%	16.7%	7.1%	5.0%	3.4%	7.8%
Discount/ outlet stores	12.9%	14.1%	27.4%	17.5%	34.6%	10.5%	60.7%	17.1%
Supermarkets	45.3%	37.7%	59.7%	52.1%	44.6%	52.9%	47.9%	59.6%
Farmer's market	25.0%	21.8%	20.6%	27.3%	14.4%	15.8%	10.1%	29.1%
Convenience stores	53.6%	53.4%	58.5%	64.1%	69.4%	56.2%	61.1%	44.0%
Duty-free stores	7.6%	7.1%	22.6%	13.5%	13.2%	31.3%	39.2%	10.3%
Hawai'i-made products	42.3%	44.5%	20.7%	44.4%	32.6%	38.4%	31.1%	43.9%
Local shops and artisans	43.6%	46.4%	10.7%	47.5%	38.2%	28.3%	18.8%	42.3%
Local fashion designers	6.3%	6.4%	2.8%	8.0%	8.1%	7.9%	1.4%	11.3%

O'AHU ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	72.5%	80.6%	55.5%	78.5%	74.0%	79.8%	65.6%	83.5%
Historic military sites and museums	35.3%	50.9%	11.4%	42.7%	48.7%	48.1%	23.0%	55.3%
Historic Hawaiian sites and museums	29.0%	34.8%	15.7%	32.5%	25.3%	29.7%	12.0%	31.6%
Other historical sites, museums, and homes	13.4%	15.6%	5.6%	13.8%	10.1%	15.4%	18.5%	15.0%
Art museums	4.2%	3.8%	2.8%	3.7%	3.0%	7.7%	5.1%	4.1%
Art galleries and exhibitions	5.3%	5.2%	4.1%	6.4%	6.5%	3.7%	2.5%	5.5%
Lū'au/ Polynesian show/ hula show	32.1%	39.1%	16.8%	34.5%	23.7%	16.0%	23.8%	31.7%
Lesson- e.g. ukulele, hula, canoe, lei making	6.4%	7.3%	6.2%	6.8%	4.1%	7.9%	5.2%	5.1%
Play/ concert/ theatre	3.8%	3.2%	3.1%	4.4%	2.3%	4.2%	3.1%	3.6%
Art/ craft fair	5.8%	6.0%	3.1%	6.8%	4.3%	6.7%	3.5%	4.2%
Festival/ event	7.3%	5.3%	5.0%	6.9%	6.0%	1.0%	4.0%	4.3%

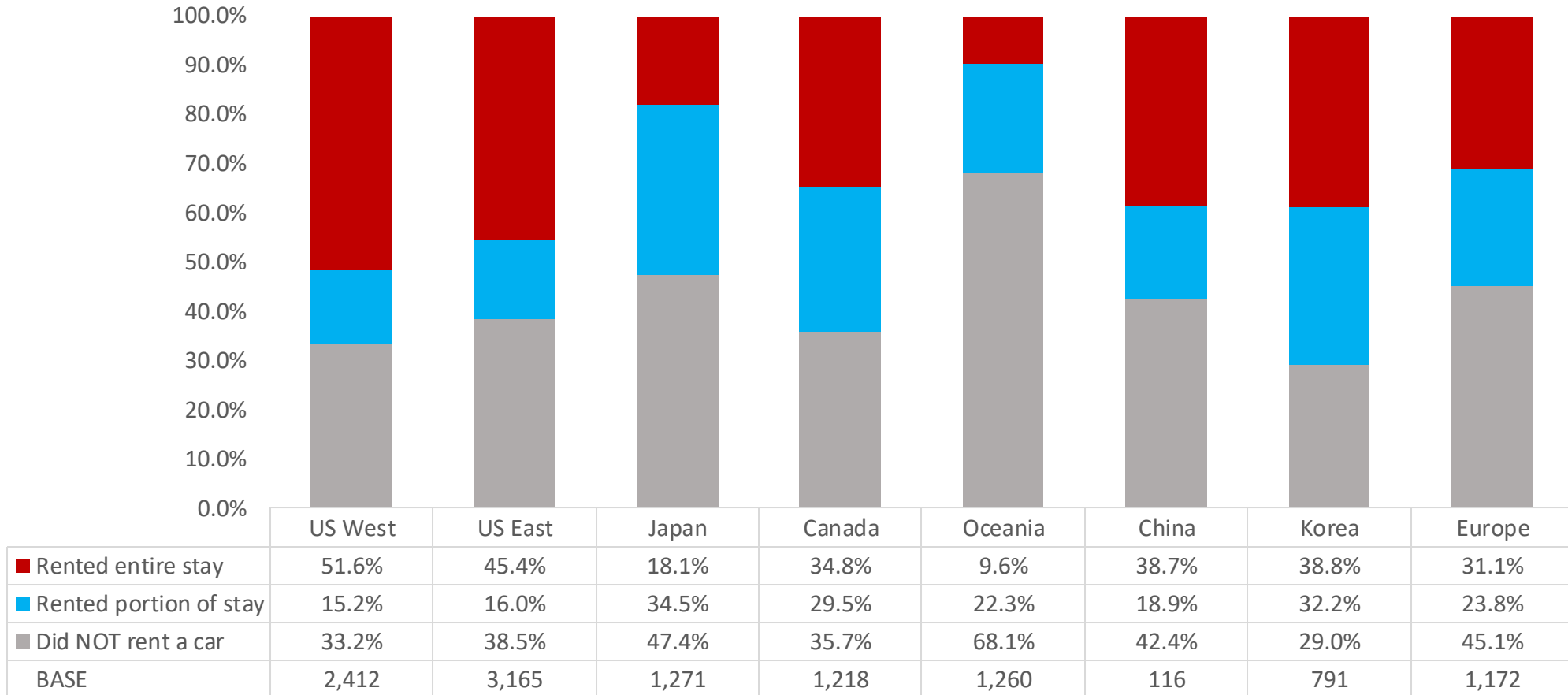
O'AHU ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	90.5%	88.9%	96.8%	94.6%	96.7%	91.1%	97.2%	95.6%
Airport shuttle	12.3%	14.3%	21.1%	16.1%	29.6%	10.9%	11.5%	16.3%
Trolley	3.5%	4.0%	51.4%	6.5%	15.3%	4.4%	23.7%	5.9%
Public bus	8.0%	7.6%	27.2%	19.6%	25.8%	22.0%	13.4%	26.8%
Tour bus/ tour van	10.7%	16.0%	18.4%	17.3%	30.3%	10.5%	26.4%	19.7%
Taxi/ limo	9.2%	10.4%	30.5%	18.8%	34.8%	12.5%	23.8%	24.5%
Rental car	57.8%	55.9%	24.0%	53.1%	23.4%	39.0%	54.1%	45.0%
Ride share	33.1%	32.0%	24.3%	40.7%	47.0%	47.2%	26.8%	32.7%
Car share	4.7%	3.6%	1.2%	7.2%	3.1%	3.6%	3.1%	3.0%
Bicycle rental	1.6%	1.6%	3.7%	1.5%	1.5%	3.7%	1.1%	1.2%

O'AHU ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	35.4%	35.9%	15.8%	21.9%	10.8%	19.7%	22.6%	16.7%
Visiting friends/ relatives	34.1%	34.9%	14.3%	20.6%	9.6%	18.0%	22.0%	14.1%
Giving back to the local community	2.0%	1.9%	1.6%	2.0%	1.3%	3.6%	1.1%	3.2%

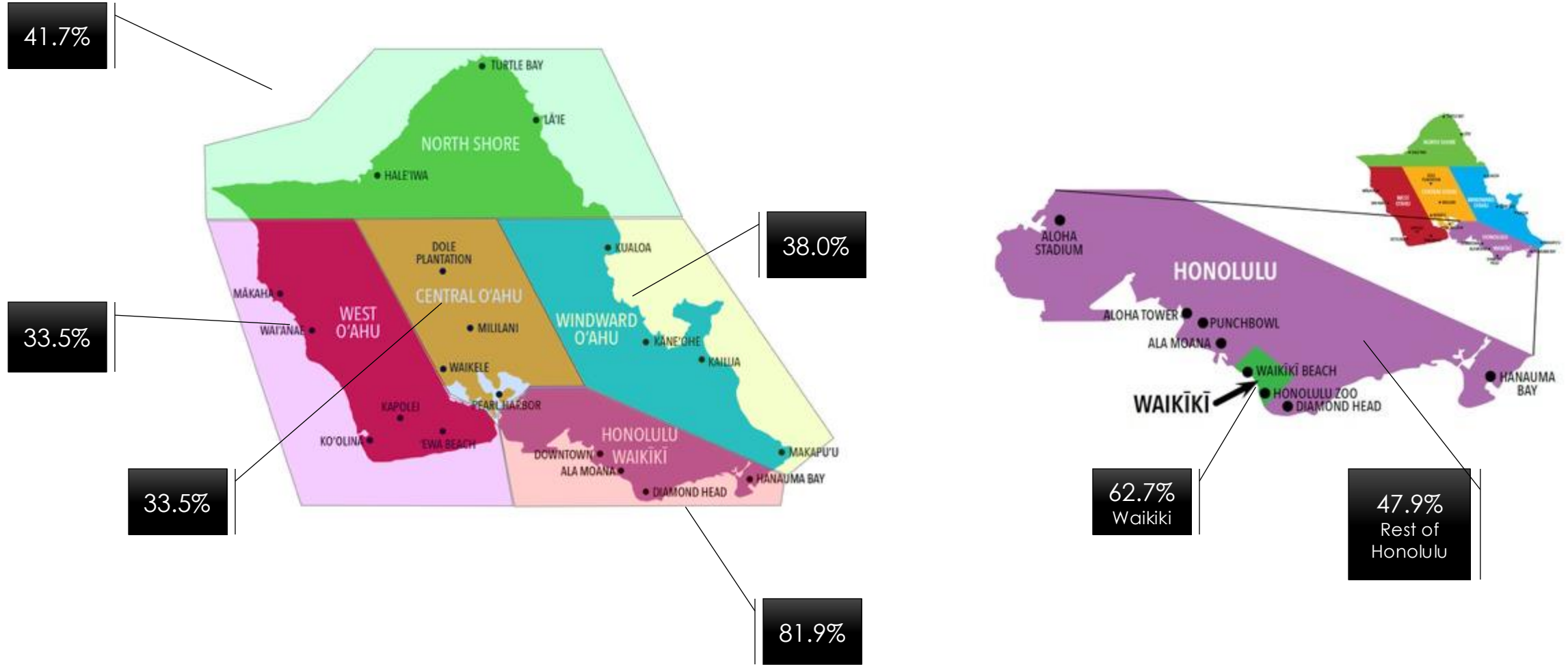
CAR RENTAL - O'AHU



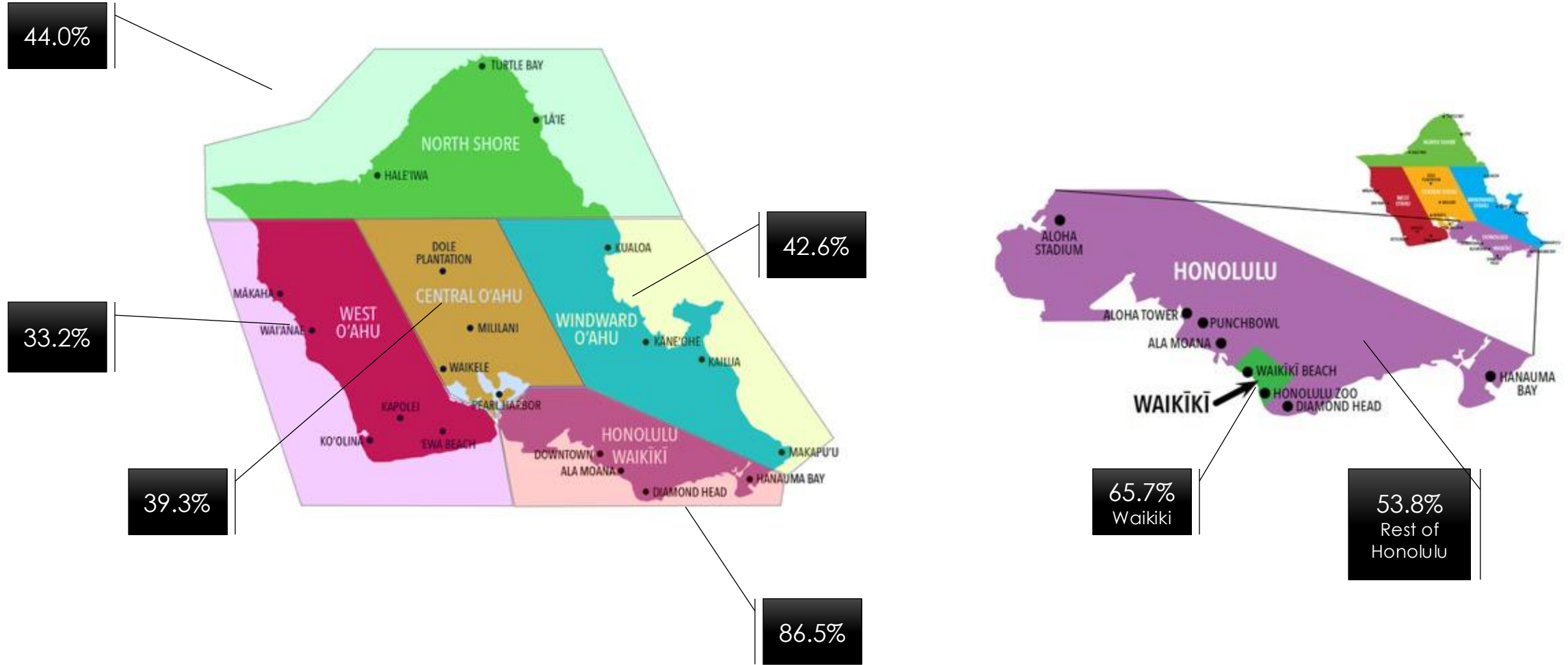
REASONS FOR PARTIAL CAR RENTAL - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	71.9%	78.8%	78.0%	74.4%	78.0%	50.6%	58.9%	71.8%
Parking was too expensive at my hotel/ lodging	42.7%	38.0%	13.0%	44.7%	27.4%	28.1%	46.1%	34.4%
Car rental rates were too expensive	20.9%	16.0%	20.1%	28.4%	21.1%	13.5%	29.9%	18.2%
Wanted to reduce my carbon footprint	11.3%	7.1%	2.4%	8.1%	7.4%	10.1%	6.2%	15.8%
Vehicles were not available for all of my trip dates	2.2%	1.8%	4.0%	1.3%	2.5%	20.2%	6.9%	3.7%
BASE	363	501	437	355	276	21	257	273

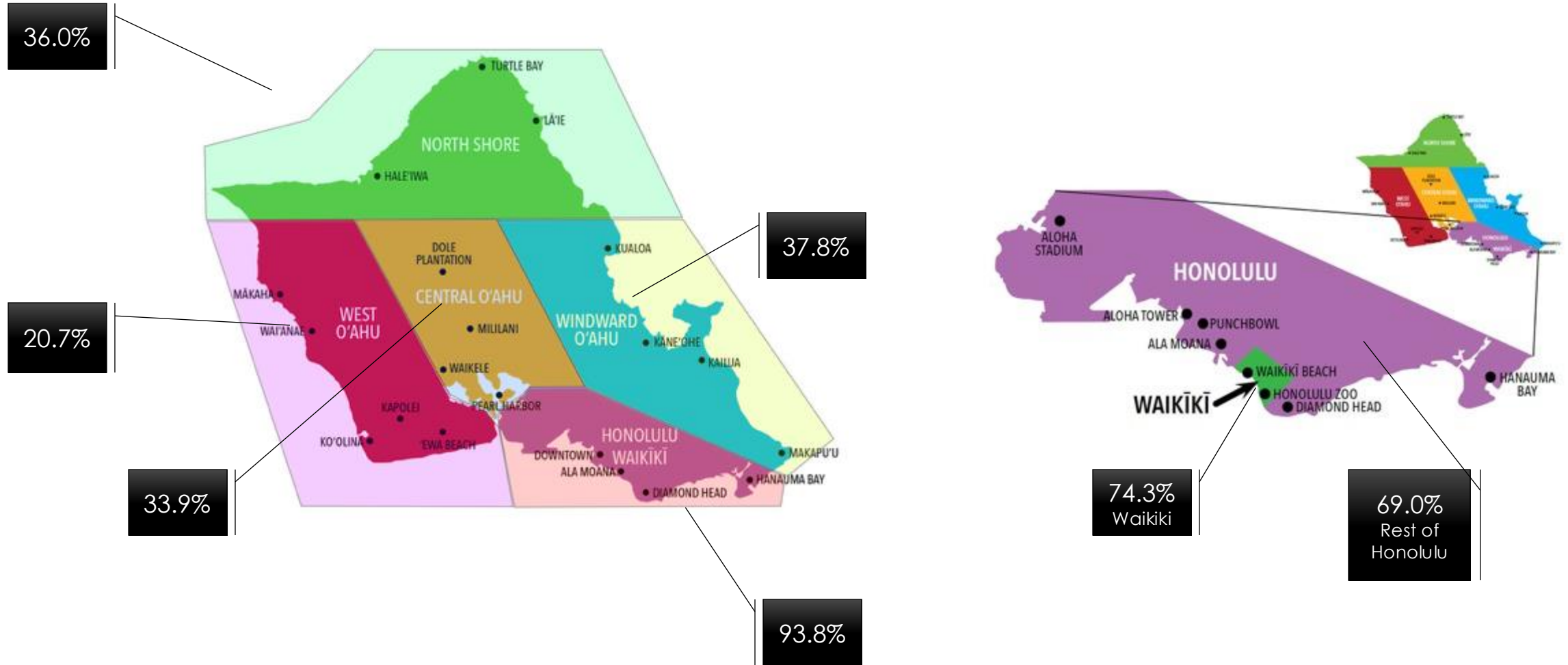
AREAS VISITED - O'AHU U.S. WEST



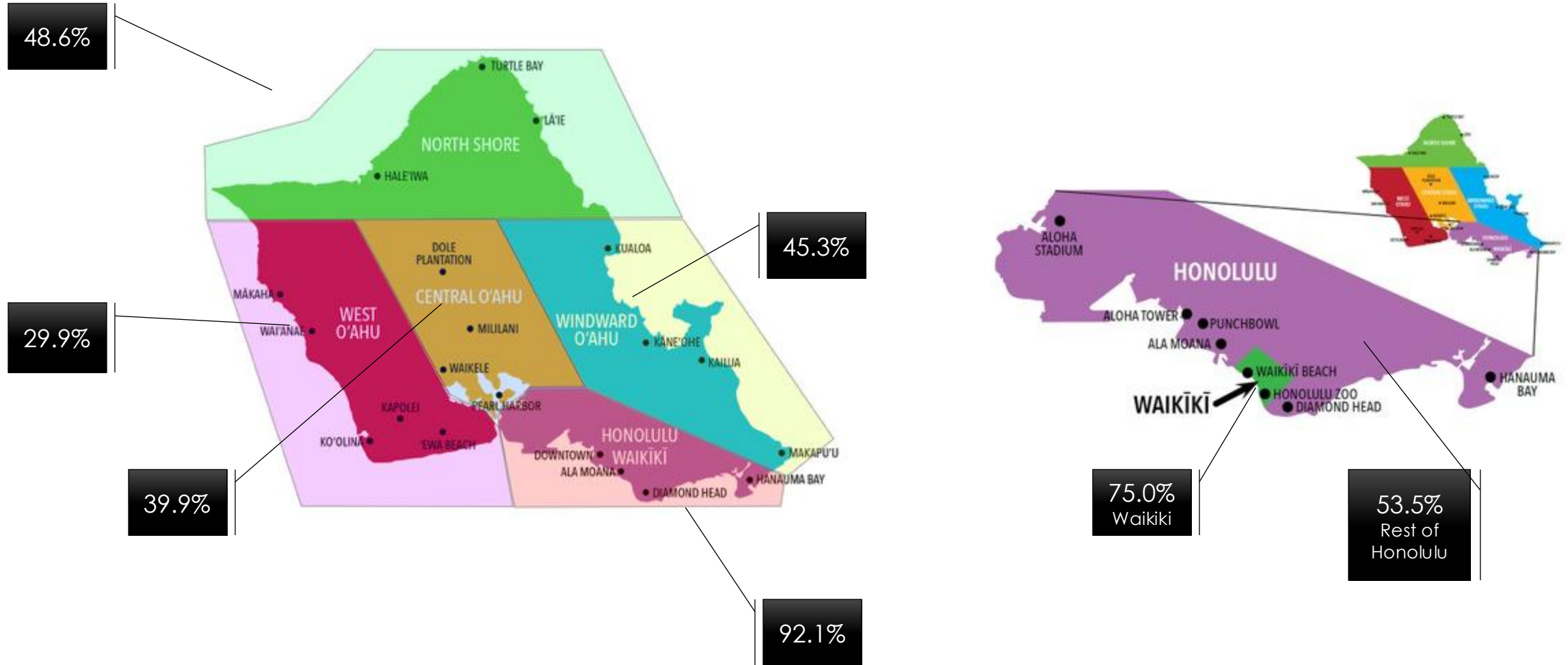
AREAS VISITED - O'AHU U.S. EAST



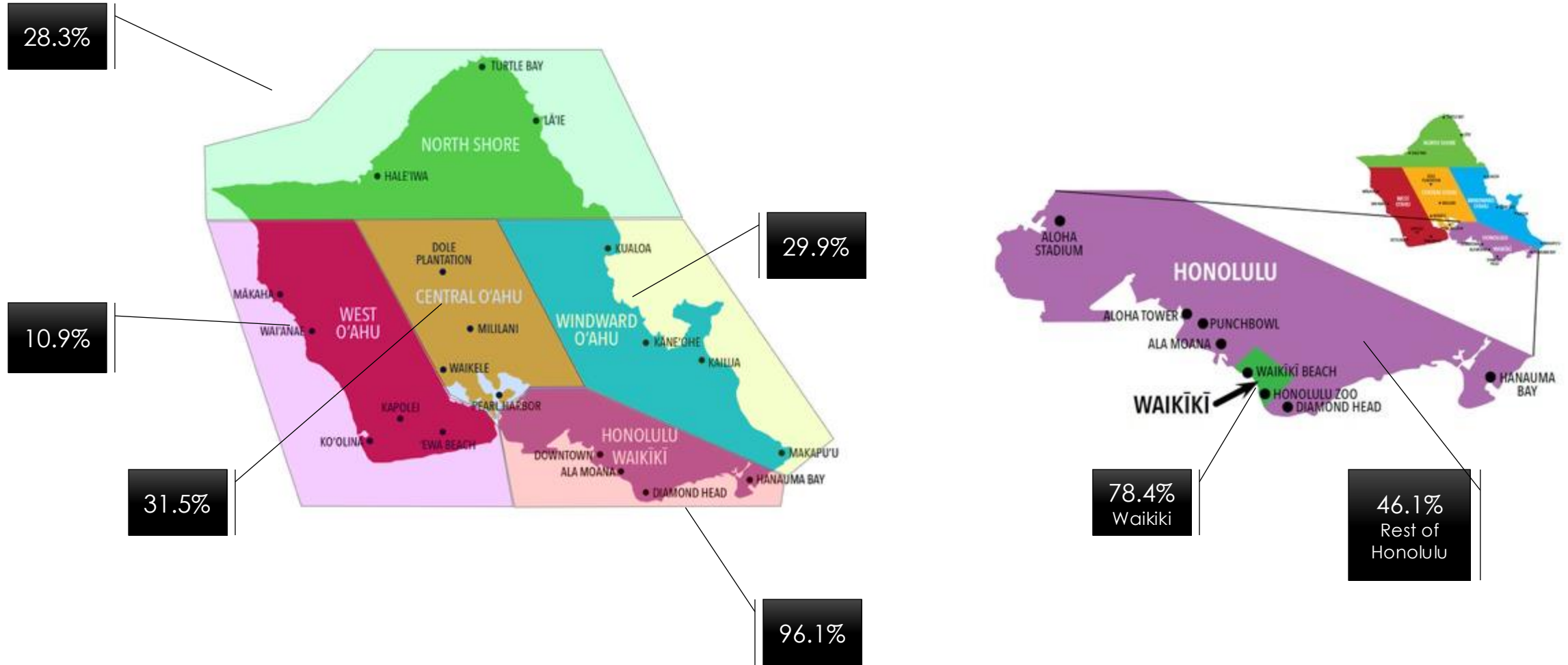
AREAS VISITED - O'AHU JAPAN



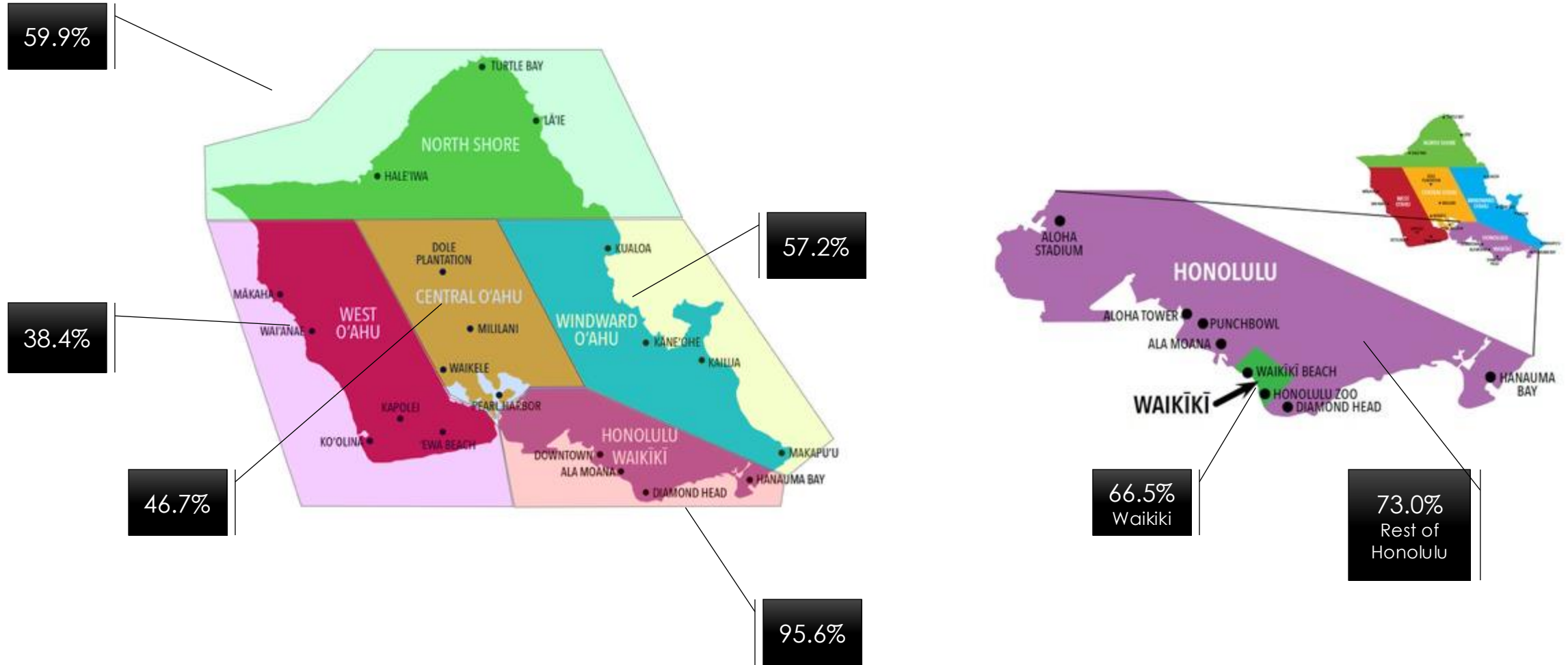
AREAS VISITED - O'AHU CANADA



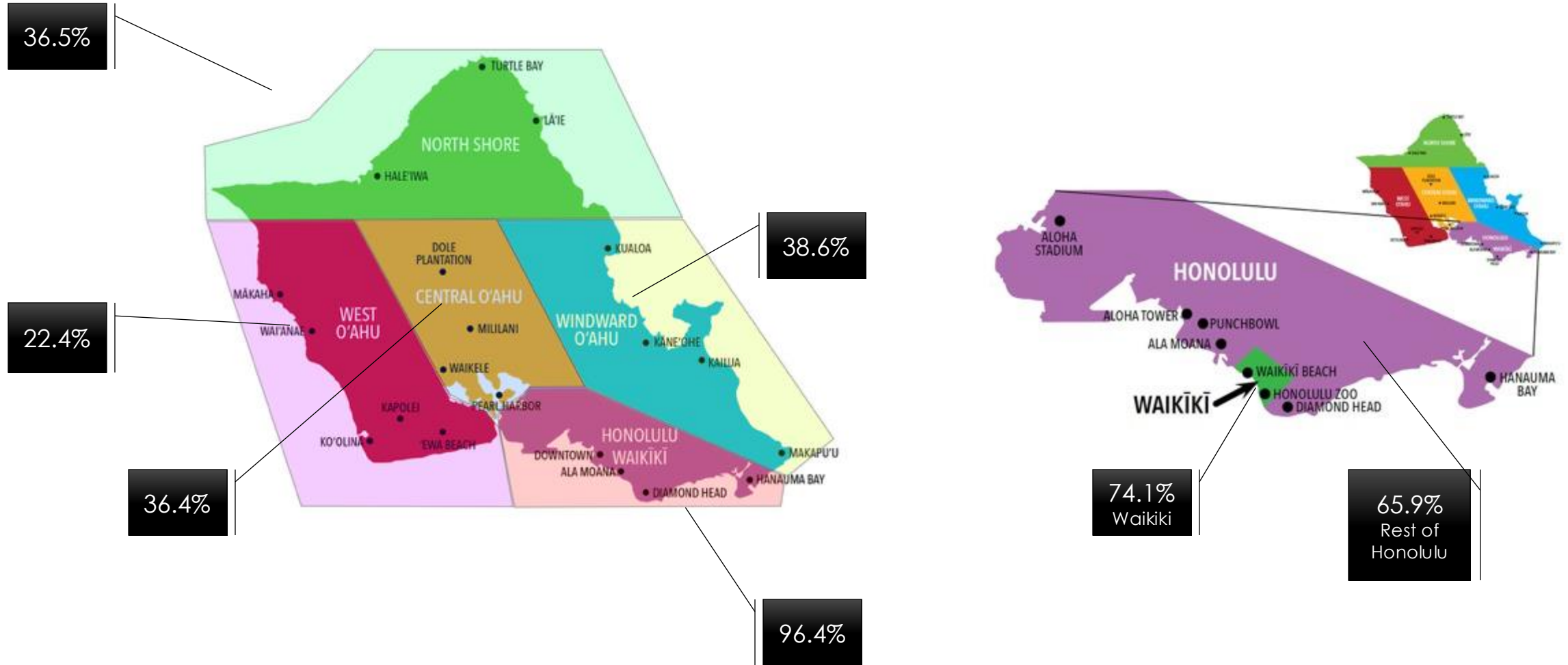
AREAS VISITED - O'AHU OCEANIA



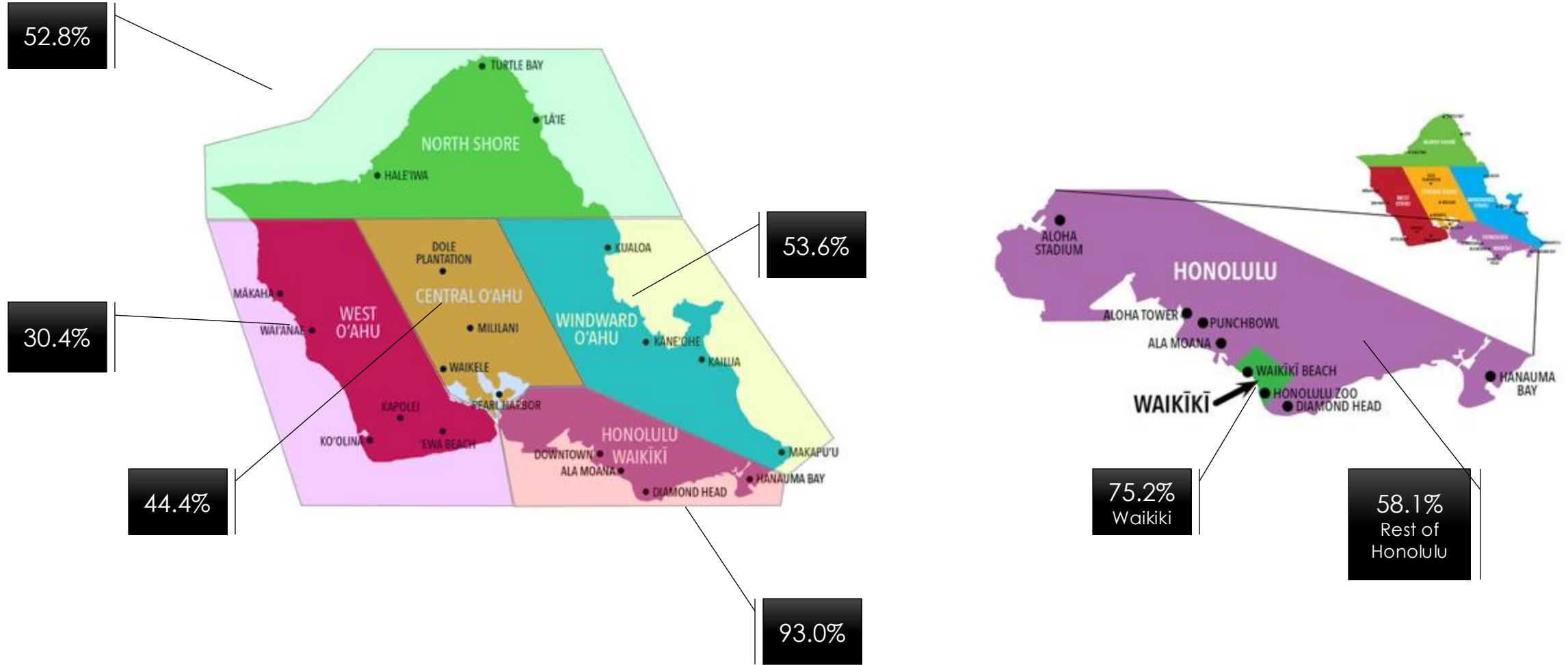
AREAS VISITED - O'AHU CHINA



AREAS VISITED - O'AHU KOREA

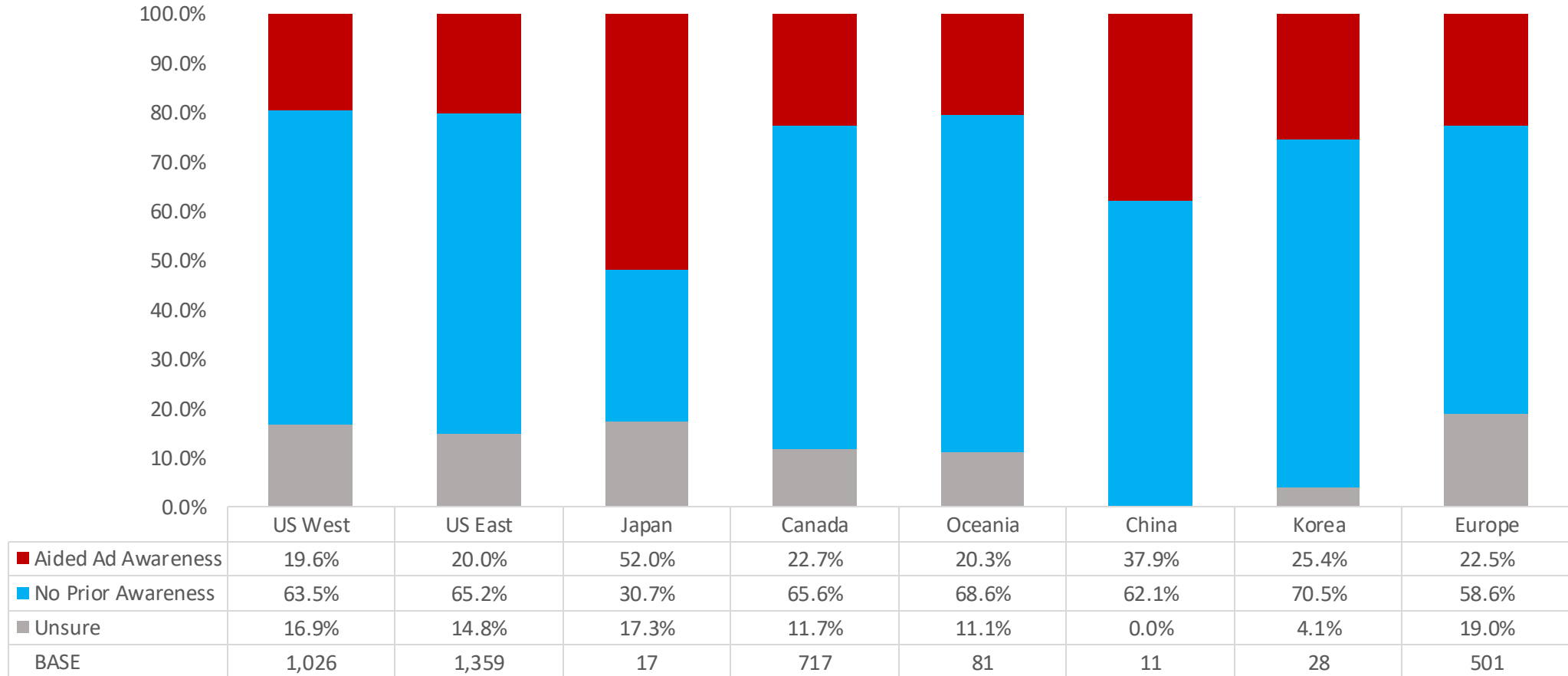


AREAS VISITED - O'AHU EUROPE



Section 22 – Kaua'i

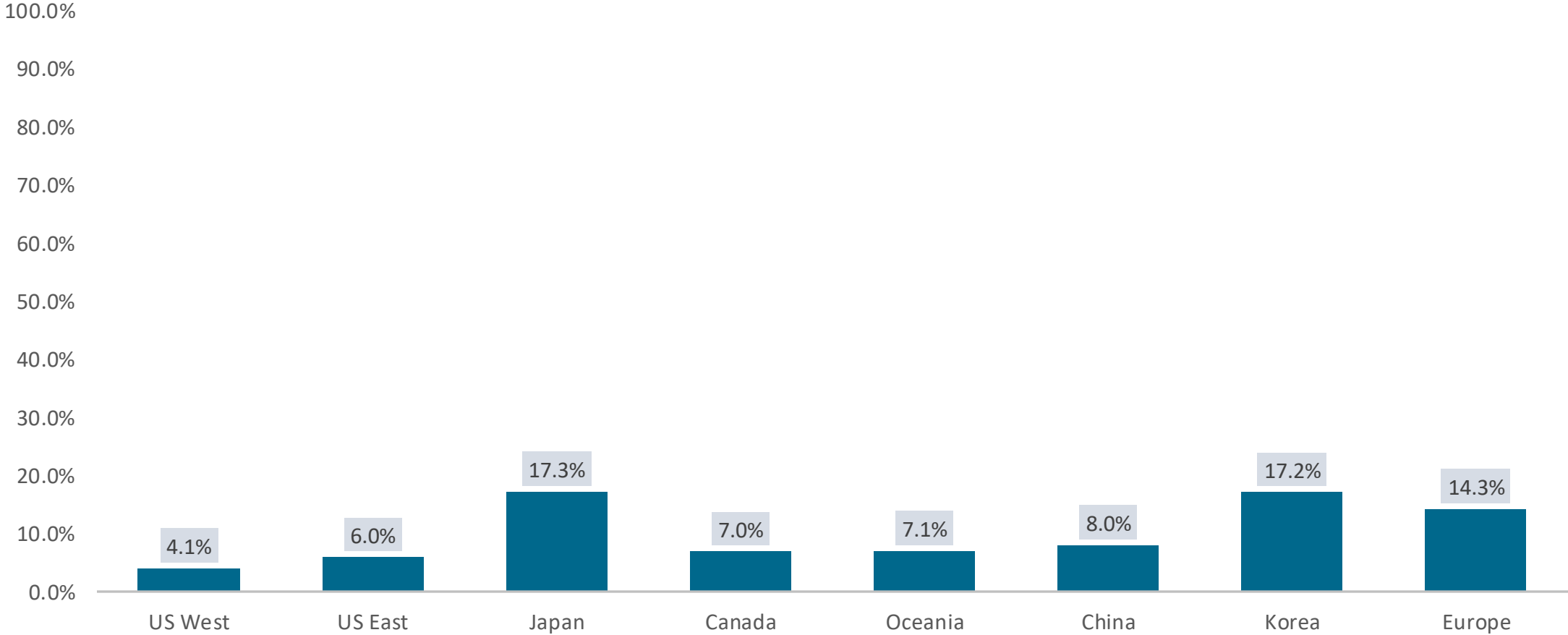
AIDED ADVERTISING AWARENESS - KAUA'I



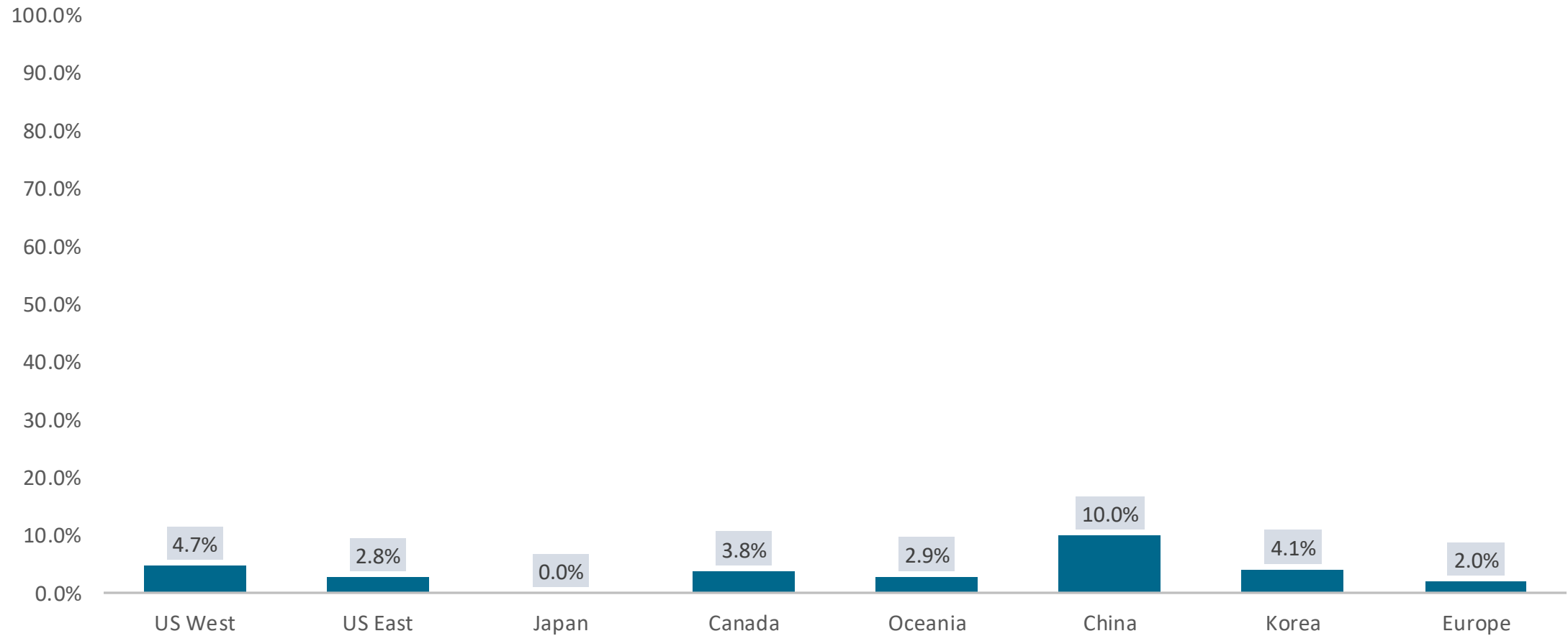
AIDED ADVERTISING AWARENESS – KAUA‘I

- **Age:** Among **U.S. West** visitors, advertising awareness for Kaua‘i was highest among seniors (65+) compared to visitors from other age groups.
- **Household income:** Respondents who reside in homes in the bottom income tier (<\$100K) from **U.S. West** were more likely to recall advertising than more affluent travelers from this market.
- **Islands visited:** Visitors from **U.S. East** who visited multiple islands, including Kaua‘i, were more likely to recall advertising for Kaua‘i than those whose trip was limited to just Kaua‘i.

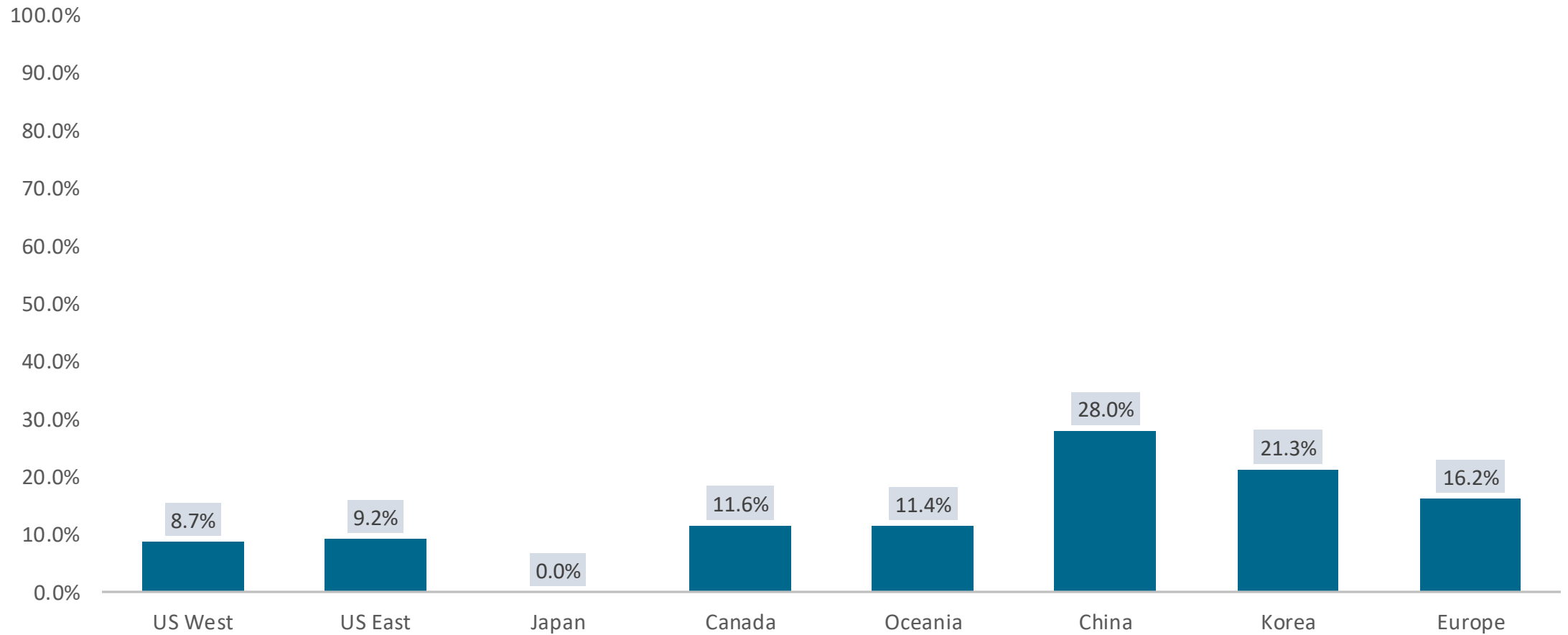
IMPACT OF LOCATION FILMING - KAUA'I



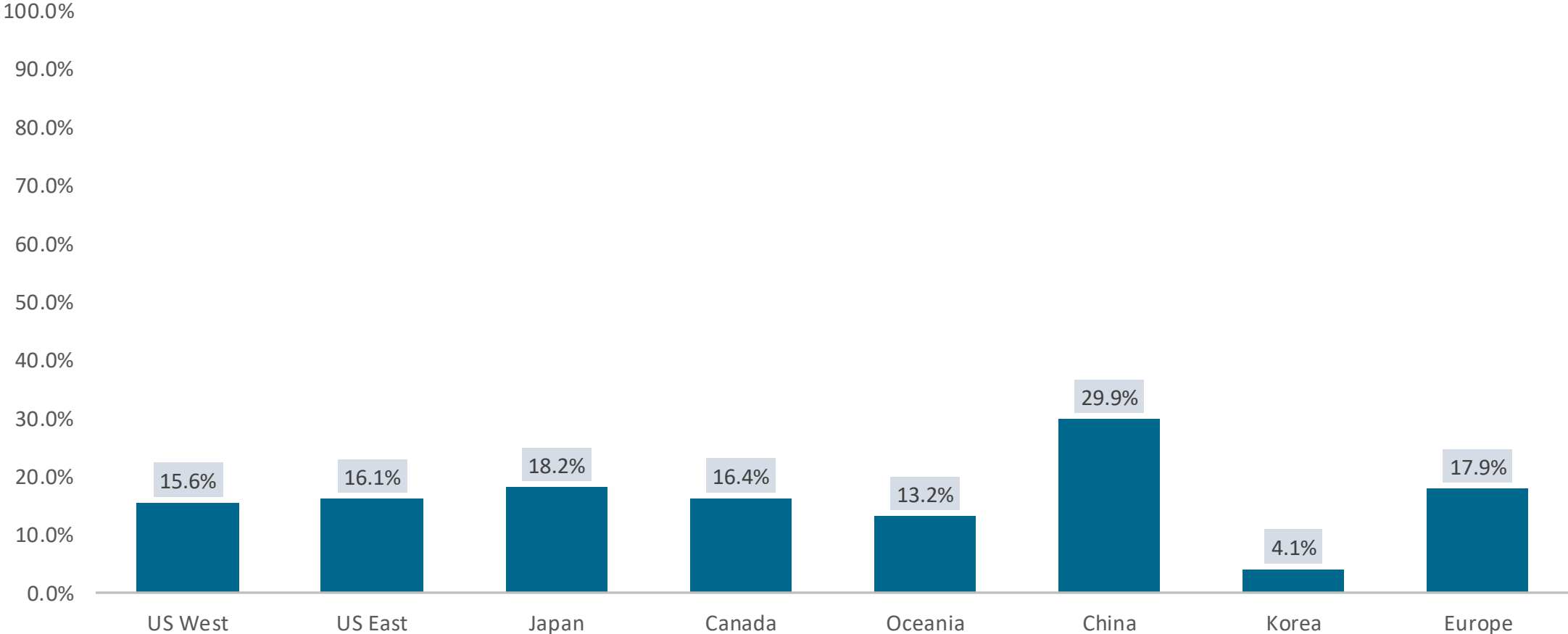
IMPACT OF HAWAIIAN MUSIC - KAUA'I



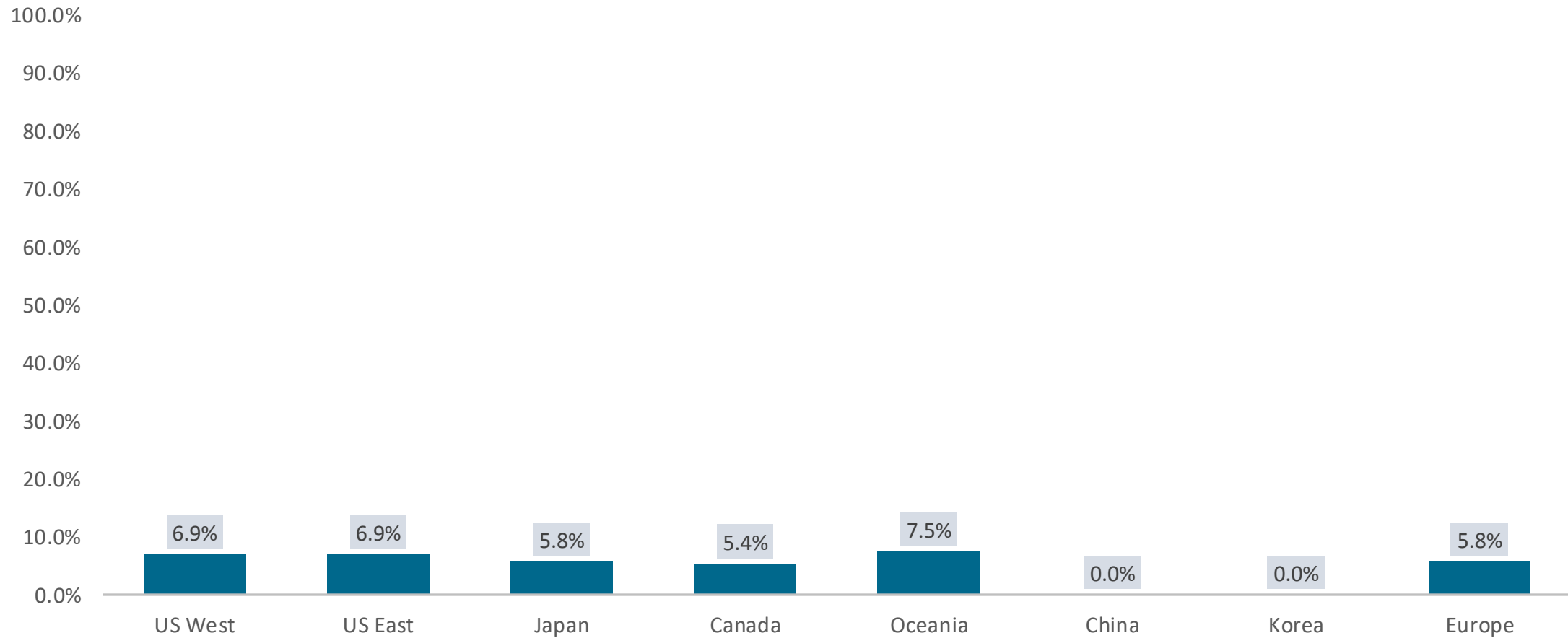
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - KAUA'I



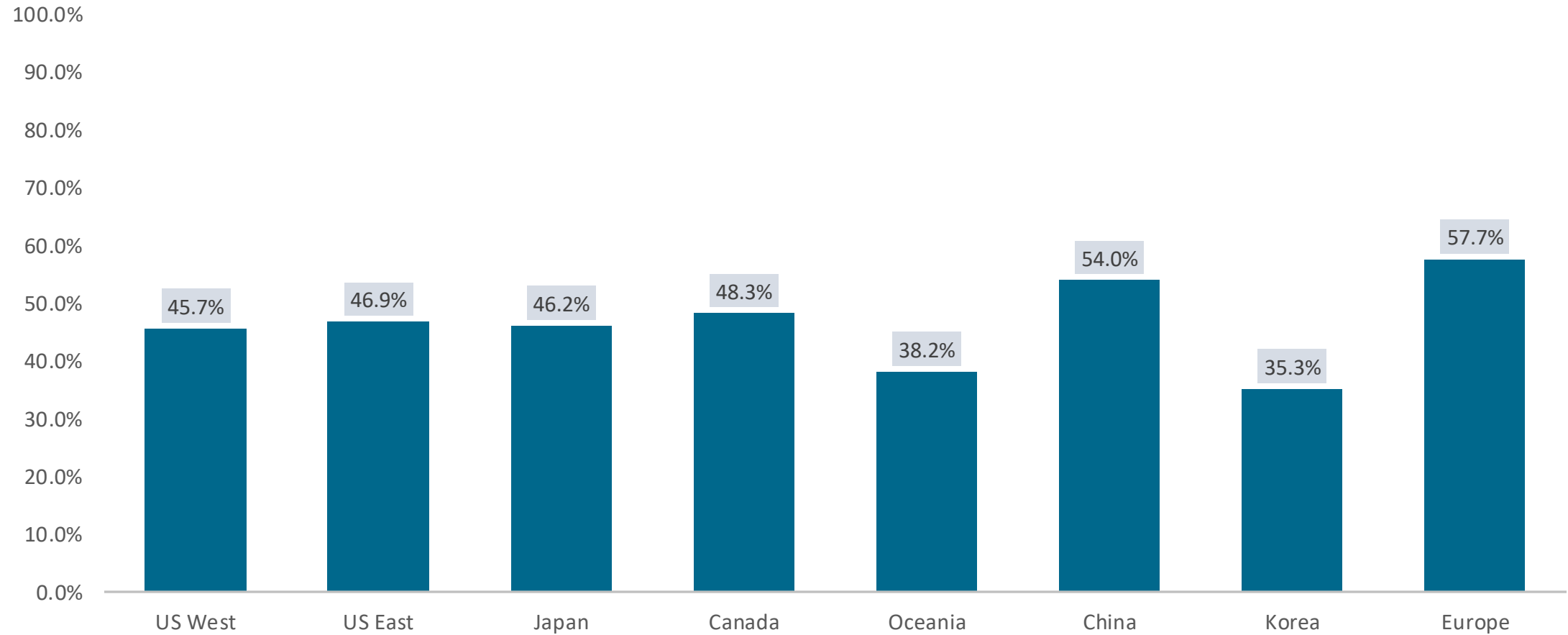
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - KAUA'I



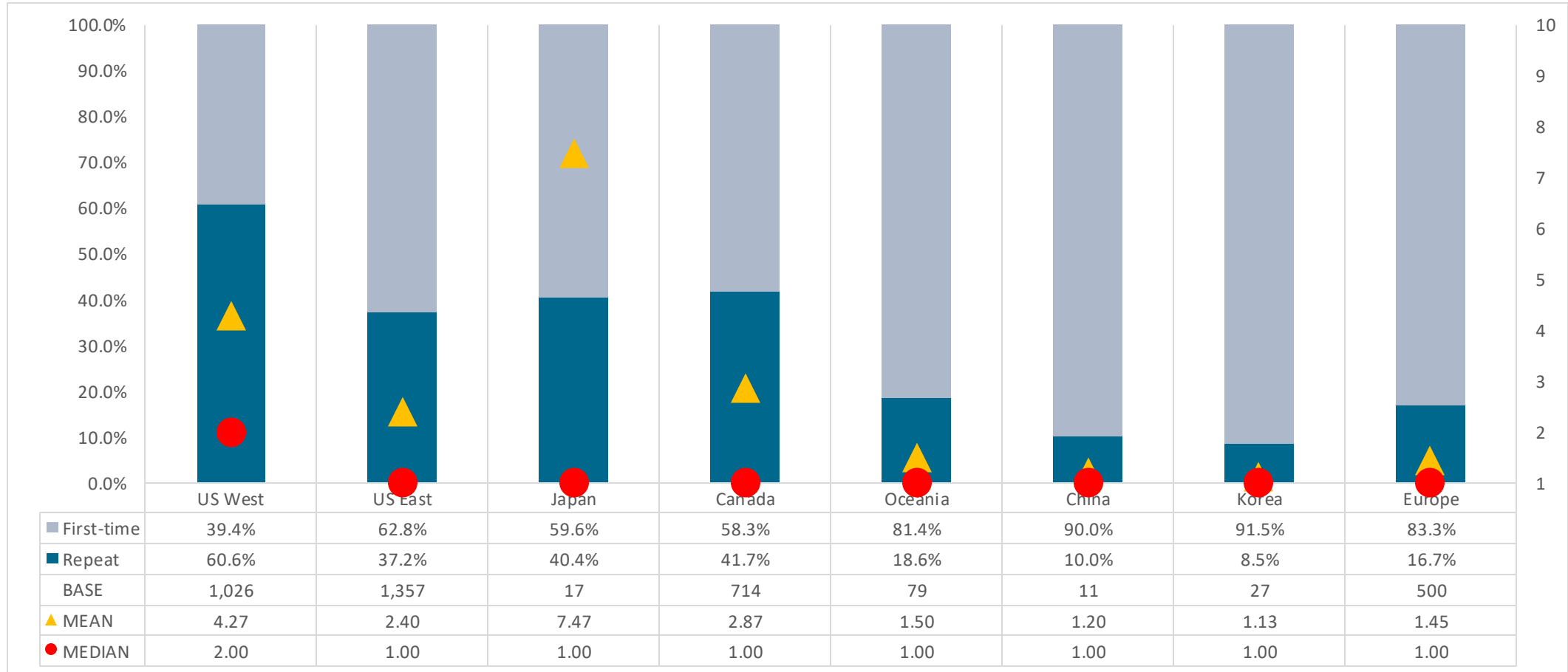
IMPACT OF HAWAIIAN CULTURAL EVENTS - KAUA'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - KAUA'I



1st TIME VS REPEAT VISITOR - KAUA'I



1st TIME VS REPEAT VISITOR - KAUA'I

- **Islands visited:** Among visitors from **U.S. East** and **Canada**, those who stayed exclusively on Kaua'i had been to the island on a more frequent basis compared to those who visited multiple islands during their trip.
- **Age:** Senior visitors from **U.S. West**, **U.S. East** and **Canada** had traveled to Kaua'i on a more frequent basis compared to younger visitors from other age groups from these markets.
- **Gender:** Male visitors from **U.S. East** had been to Kaua'i more often than female visitors.
- **Travel party size:** Respondents from **U.S. West** who traveled by themselves had been to Kaua'i more often than visitors in larger travel parties.

STRENGTHS/ POSITIVE ASPECTS - KAUA'I

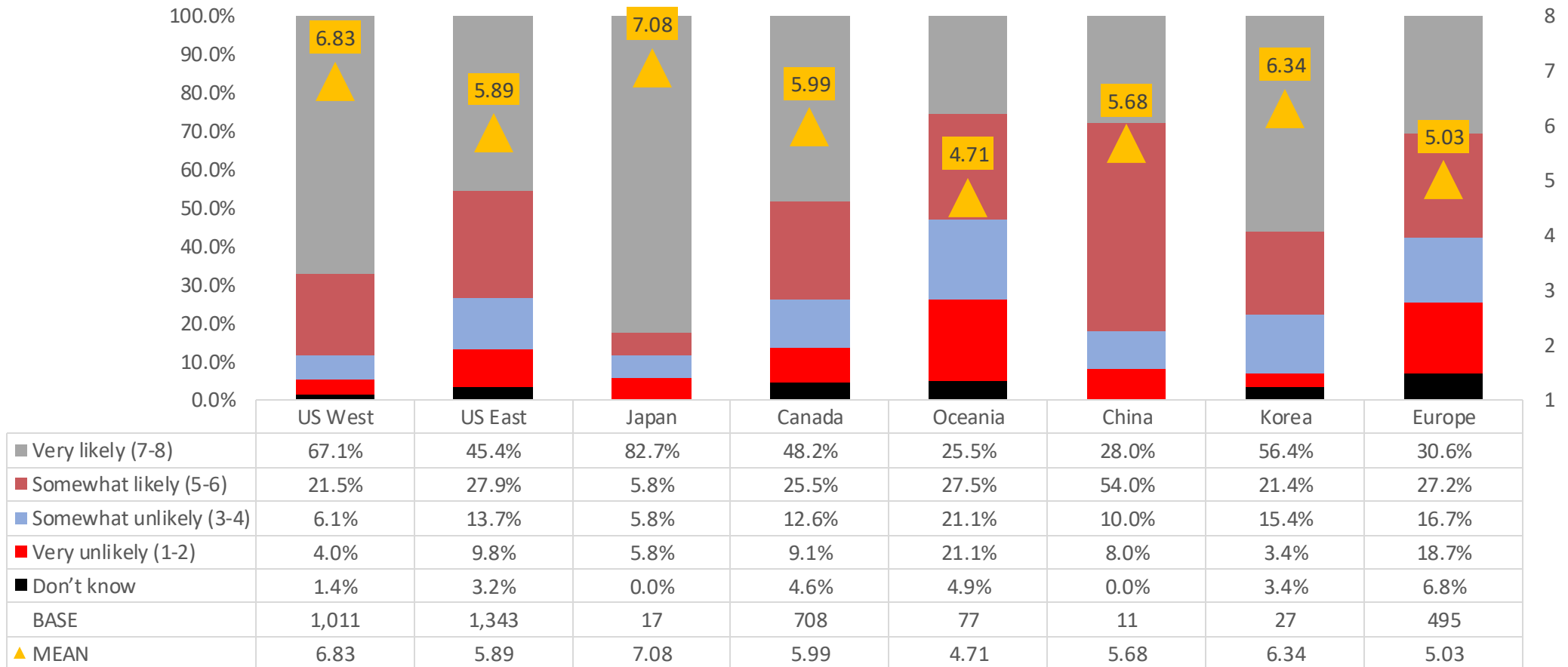
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Nature/ natural beauty/ scenery	32.2%	38.8%	17.3%	39.6%	35.9%	52.1%	47.1%	50.5%
Variety of activities/ attractions/ many choices	10.8%	16.2%	6.7%	14.3%	8.9%	18.0%	18.0%	13.6%
Beach/ ocean	13.8%	7.1%	17.3%	10.0%	8.9%	10.0%	11.9%	7.3%
Feeling of the "Aloha Spirit"	9.7%	9.0%	5.8%	9.0%	4.1%	19.9%	0.0%	7.8%
Friendliness of the local people	6.8%	6.4%	0.0%	6.7%	11.1%	0.0%	0.0%	7.1%
Local culture/ people/ music	4.3%	2.6%	5.8%	3.0%	1.5%	0.0%	0.0%	0.8%
Events/ celebrations with friends/ family	3.8%	3.1%	23.1%	1.5%	1.5%	0.0%	0.0%	1.0%
Accommodations/ was as promised	3.8%	2.5%	12.4%	4.3%	2.6%	0.0%	0.0%	2.2%

AREAS OF OPPORTUNITIES - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	40.5%	45.7%	40.4%	43.7%	50.8%	36.0%	35.1%	49.3%
Traffic (congested/ slow)	12.9%	13.3%	5.8%	9.1%	6.8%	10.0%	11.9%	4.2%
Food/ restaurant variety/ dining options	8.3%	5.7%	0.0%	4.0%	0.0%	0.0%	13.7%	5.7%
Would like to experience more local culture	5.7%	5.8%	6.7%	5.3%	4.9%	0.0%	4.3%	5.6%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	6.2%	3.9%	5.8%	3.9%	0.0%	8.0%	0.0%	3.1%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	3.3%	4.6%	11.6%	4.2%	6.8%	10.0%	8.5%	5.5%
Cost/Expensive (specific/ non-specific)	3.3%	2.8%	0.0%	5.6%	4.9%	0.0%	4.3%	4.6%
Driving experience (signage, road surface, traffic violations, bad drivers)	3.0%	2.8%	0.0%	2.6%	7.9%	8.0%	4.3%	1.2%
Food/ restaurant quality	2.4%	1.7%	5.8%	2.5%	1.1%	0.0%	10.3%	5.0%
Variety of activities/ attractions	2.0%	1.0%	6.7%	2.7%	2.6%	10.0%	4.3%	2.2%

LIKELIHOOD OF RETURN VISIT - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

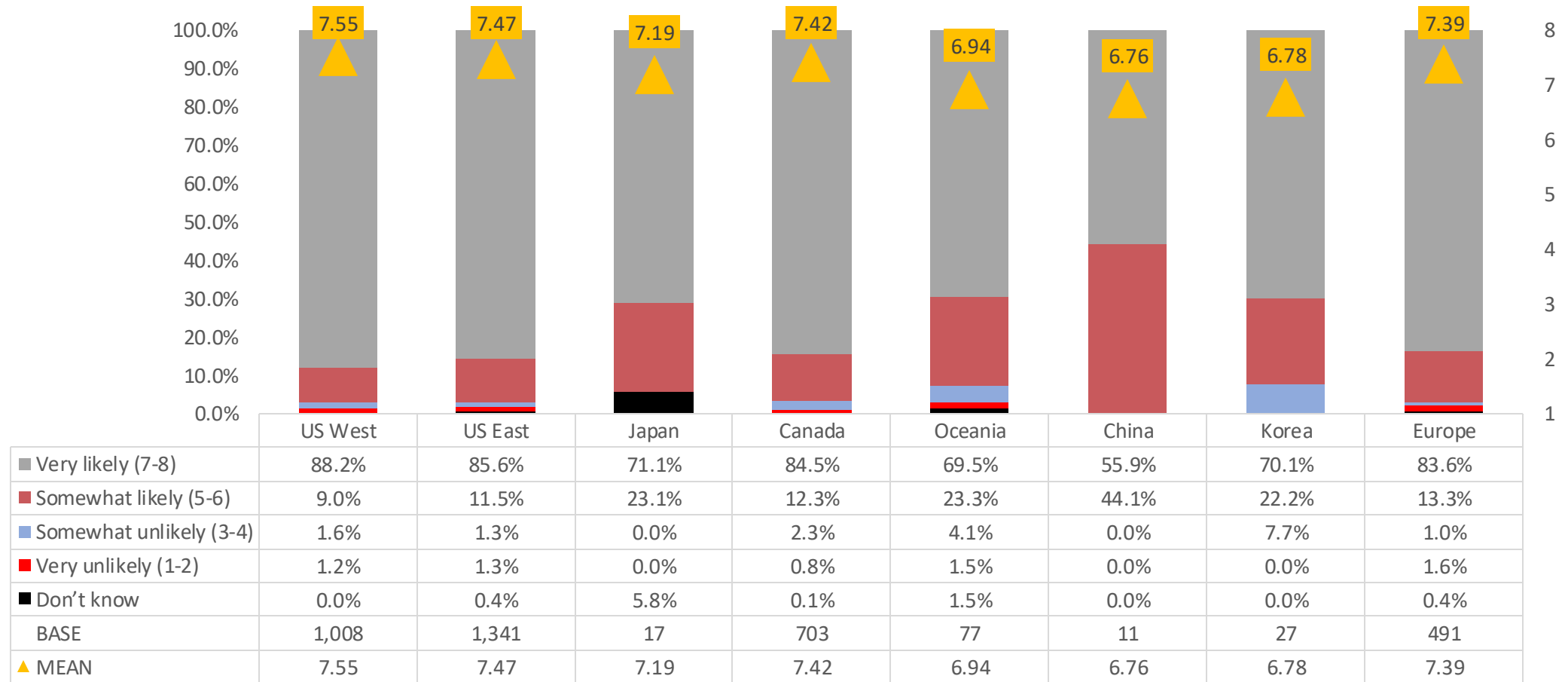
- **Gender:** Female visitors from **U.S. East** expressed a greater likelihood of returning to Kaua'i in the next five years than male visitors.
- **Islands visited:** Visitors from **U.S. West, U.S. East** and **Canada** who stayed exclusively on Kaua'i expressed a stronger likelihood of returning to the island in the next five years than visitors from these markets whose trip included stays on multiple islands.
- **Travel party size:** **U.S. West** and **U.S. East** visitors who came alone were the most likely to indicate a possible return in the next five years compared to those from these markets who came in larger travel parties.
- **Household income:** Those residing in homes in the upper income tier (\$150K+) from **U.S. East** were more likely to return than those residing in less affluent homes.
- **Age:** Seniors (65+) from **U.S. East** were the least likely to anticipate a return trip to Kaua'i in the next five years.

REASONS FOR NOT RETURNING - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Want to go someplace new	51.7%	46.7%	100.0%	49.0%	47.3%	0.0%	65.4%	41.6%
Too expensive/cost	26.7%	33.1%	0.0%	48.1%	19.3%	55.3%	19.1%	44.1%
Flight too long	5.2%	33.6%	0.0%	25.0%	2.4%	0.0%	15.4%	55.2%
No reason to return/ nothing new	16.4%	14.7%	0.0%	10.0%	15.9%	0.0%	0.0%	11.0%
Not enough value for the price	13.8%	6.4%	0.0%	8.0%	12.9%	0.0%	15.4%	9.2%
Other financial obligations	7.8%	8.6%	0.0%	6.5%	5.6%	0.0%	0.0%	8.2%
Poor health/ age restriction	6.9%	6.1%	50.0%	3.8%	11.2%	0.0%	0.0%	2.0%
Too crowded/ congested/ traffic	8.6%	4.4%	0.0%	3.2%	5.6%	0.0%	0.0%	1.4%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	4.3%	4.9%	0.0%	5.9%	0.0%	0.0%	0.0%	1.0%
Other (please specify)	5.2%	3.1%	0.0%	1.4%	5.6%	44.7%	0.0%	1.4%
Unfriendly people/ felt unwelcome	5.2%	1.4%	0.0%	1.6%	0.0%	0.0%	0.0%	1.0%

BRAND/ DESTINATION ADVOCACY - KAUA'I

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



KAUA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	98.8%	99.5%	100.0%	98.9%	97.3%	100.0%	100.0%	99.8%
On own (self-guided)/ driving around the island	89.1%	79.8%	75.5%	84.8%	63.3%	80.1%	61.4%	79.1%
Helicopter ride/ airplane tour	7.8%	16.6%	6.1%	10.6%	12.2%	19.9%	11.1%	32.6%
Boat tour/ submarine ride/ whale watching	26.0%	34.2%	6.1%	27.0%	18.0%	18.0%	15.4%	24.2%
Visiting towns/ communities	67.1%	62.7%	37.7%	62.3%	42.0%	37.9%	23.0%	45.1%
Private limousine/ van tour/ tour bus	3.1%	9.9%	12.3%	5.9%	14.5%	10.0%	24.0%	9.4%
Scenic views/ natural landmarks	72.1%	74.8%	31.6%	73.0%	64.9%	37.9%	59.8%	68.2%
Movie and TV filming location tours	3.9%	4.6%	0.0%	4.8%	2.7%	0.0%	14.5%	6.8%

KAUA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.9%	94.2%	80.7%	96.1%	85.1%	100.0%	93.1%	93.8%
Beach/ sunbathing	84.7%	76.2%	56.1%	82.7%	59.6%	37.9%	64.1%	77.6%
Bodyboarding	12.9%	6.6%	0.0%	11.6%	2.3%	0.0%	0.0%	6.0%
Stand-up paddle boarding	2.9%	2.0%	0.0%	1.9%	0.0%	0.0%	4.3%	1.0%
Surfing	8.0%	5.4%	6.1%	7.2%	4.9%	0.0%	4.3%	8.3%
Canoe paddling	1.1%	0.5%	0.0%	1.9%	1.1%	0.0%	0.0%	2.7%
Kayaking	10.5%	9.3%	0.0%	8.5%	2.7%	8.0%	7.7%	6.8%
Swimming in the ocean	62.3%	53.2%	12.3%	61.0%	45.1%	19.9%	23.9%	57.7%
Snorkeling	44.3%	34.1%	13.2%	43.9%	32.1%	28.0%	22.2%	40.8%
Freediving	1.1%	0.6%	6.1%	0.6%	0.0%	0.0%	3.4%	0.6%
Windsurfing/ kitesurfing	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	4.3%	0.2%
Jet skiing/ parasailing	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Scuba diving	1.5%	1.1%	0.0%	1.7%	0.0%	0.0%	0.0%	2.7%
Fishing	3.1%	2.4%	0.0%	1.2%	0.0%	0.0%	0.0%	1.2%
Golf	9.5%	6.6%	12.3%	6.2%	4.9%	0.0%	8.5%	2.3%

KAUA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.9%	94.2%	80.7%	96.1%	85.1%	100.0%	93.1%	93.8%
Running/ jogging/ fitness walking	30.7%	25.3%	12.3%	28.7%	16.4%	10.0%	11.9%	17.3%
Cycling	5.6%	3.7%	0.0%	7.0%	1.1%	10.0%	8.5%	4.6%
Spa	5.7%	5.6%	0.0%	3.1%	2.7%	0.0%	4.3%	3.1%
Hiking	49.3%	47.3%	6.1%	49.4%	20.6%	72.0%	25.7%	56.3%
Backpacking/ camping	1.5%	2.2%	0.0%	3.1%	4.2%	0.0%	0.0%	4.1%
Agritourism	11.4%	12.0%	6.1%	6.7%	5.3%	0.0%	24.8%	4.2%
Sports event or tournament	0.9%	0.8%	0.0%	1.2%	0.0%	0.0%	0.0%	0.2%
Parks/ botanical gardens	36.2%	40.1%	18.4%	40.1%	34.8%	19.9%	30.7%	34.1%
Waterparks	0.9%	0.4%	0.0%	0.4%	1.1%	10.0%	0.0%	1.3%
Mountain tubing/ waterfall rappel	10.8%	8.2%	0.0%	6.8%	6.8%	8.0%	0.0%	4.7%
Zip-lining	5.7%	3.4%	0.0%	2.0%	2.7%	0.0%	0.0%	1.4%
Skydiving	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	2.8%	3.4%	0.0%	2.6%	2.3%	0.0%	0.0%	1.0%
Horseback riding	0.7%	1.2%	0.0%	0.7%	2.7%	0.0%	0.0%	0.4%

KAUA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.8%	94.1%	93.9%	94.4%	84.3%	92.0%	86.3%	92.9%
Lunch/ sunset/ dinner/ evening cruise	19.0%	23.3%	13.2%	20.6%	11.0%	16.1%	28.3%	23.6%
Live music/ stage show	22.9%	27.1%	19.3%	20.0%	6.9%	0.0%	11.9%	13.5%
Nightclub/ dancing/ bar/ karaoke	3.5%	3.6%	0.0%	2.6%	1.5%	0.0%	0.0%	2.7%
Fine dining	43.9%	40.5%	30.7%	34.2%	16.4%	28.0%	6.9%	20.2%
Family restaurant	64.0%	52.2%	0.0%	52.8%	29.7%	37.9%	8.5%	33.2%
Fast food	21.8%	20.7%	24.5%	28.2%	16.4%	34.1%	20.4%	26.9%
Food truck	46.9%	41.3%	19.3%	43.2%	28.6%	55.9%	34.2%	43.9%
Café/ coffee house	54.1%	48.3%	43.9%	53.7%	40.4%	37.9%	42.7%	48.2%
Ethnic dining	23.4%	20.6%	0.0%	17.8%	1.5%	0.0%	22.2%	8.5%
Farm-to-table cuisine	18.7%	17.8%	30.7%	12.9%	3.1%	0.0%	0.0%	8.6%
Prepared own meal	57.6%	37.0%	30.7%	63.7%	45.5%	26.0%	32.4%	38.0%

KAUA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.9%	92.8%	92.9%	94.0%	87.8%	83.9%	82.8%	90.6%
Malls/ department stores	23.6%	20.5%	36.8%	35.0%	29.7%	19.9%	26.5%	30.2%
Designer boutiques	15.8%	14.6%	0.0%	13.4%	2.7%	0.0%	0.0%	5.8%
Hotel/ resort stores	22.6%	24.2%	12.3%	16.3%	11.5%	10.0%	4.3%	12.6%
Swap meet/ flea market	8.2%	5.1%	0.0%	6.9%	3.8%	0.0%	0.0%	2.5%
Discount/ outlet stores	9.5%	10.6%	12.3%	11.4%	6.5%	0.0%	18.8%	7.4%
Supermarkets	68.4%	53.8%	49.1%	63.5%	45.8%	37.9%	45.3%	59.5%
Farmer's market	46.7%	35.6%	12.3%	48.7%	23.7%	28.0%	7.7%	32.0%
Convenience stores	44.3%	38.7%	6.1%	37.1%	41.2%	19.9%	11.1%	22.1%
Duty-free stores	2.0%	1.9%	0.0%	1.5%	3.1%	0.0%	8.5%	2.1%
Hawai'i-made products	49.1%	50.2%	24.5%	48.3%	29.0%	37.9%	6.9%	38.0%
Local shops and artisans	68.2%	66.8%	43.9%	62.9%	42.0%	46.0%	27.3%	47.6%
Local fashion designers	9.9%	7.9%	6.1%	10.8%	8.4%	0.0%	0.0%	10.1%

KAUA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	61.5%	67.0%	57.1%	65.9%	43.5%	47.9%	50.5%	52.3%
Historic military sites and museums	6.1%	7.0%	6.1%	4.3%	10.3%	0.0%	10.3%	5.4%
Historic Hawaiian sites and museums	29.1%	32.1%	18.4%	33.6%	21.3%	29.9%	22.2%	25.1%
Other historical sites, museums, and homes	13.3%	13.1%	19.3%	12.7%	7.6%	8.0%	6.9%	8.5%
Art museums	1.8%	1.8%	0.0%	1.0%	3.1%	0.0%	3.4%	2.5%
Art galleries and exhibitions	7.9%	8.3%	6.1%	9.7%	5.7%	0.0%	3.4%	7.7%
Lū'au/ Polynesian show/ hula show	21.5%	30.8%	0.0%	21.1%	11.8%	10.0%	0.0%	18.0%
Lesson- e.g. ukulele, hula, canoe, lei making	3.9%	4.3%	7.1%	3.2%	1.1%	0.0%	0.0%	3.3%
Play/ concert/ theatre	1.7%	0.9%	0.0%	2.0%	0.0%	0.0%	3.4%	1.5%
Art/ craft fair	15.6%	11.9%	6.1%	15.3%	6.9%	10.0%	11.1%	3.5%
Festival/ event	3.0%	3.2%	0.0%	5.2%	1.5%	0.0%	6.9%	2.7%

KAUA'I ACTIVITIES - TRANSPORTATION

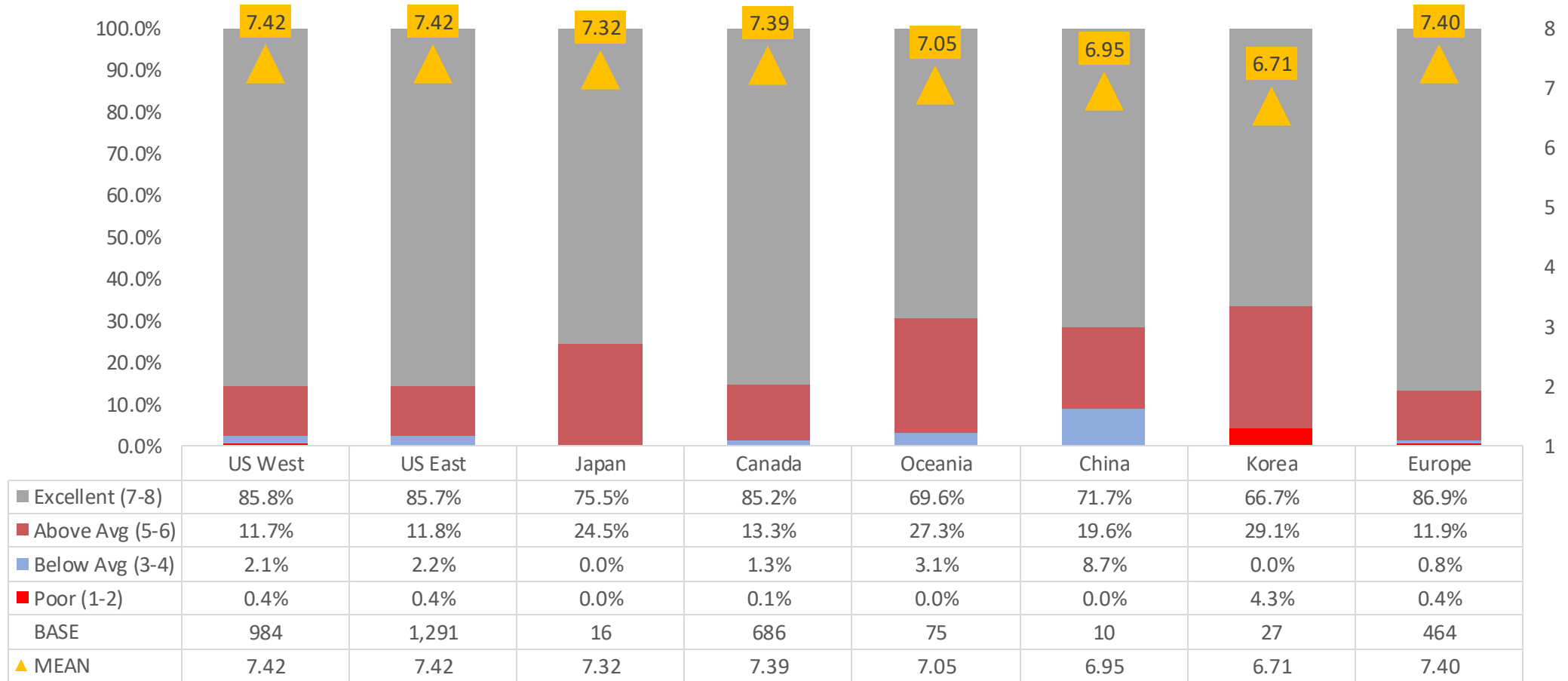
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	93.9%	93.8%	93.9%	95.1%	91.2%	82.0%	95.7%	91.9%
Airport shuttle	14.0%	13.1%	6.1%	11.0%	13.4%	8.0%	4.3%	9.5%
Trolley	0.8%	1.5%	0.0%	1.9%	2.7%	0.0%	0.0%	0.8%
Public bus	1.0%	1.5%	0.0%	2.9%	5.7%	10.0%	0.0%	3.4%
Tour bus/ tour van	4.8%	13.8%	12.3%	10.9%	22.9%	10.0%	41.2%	10.8%
Taxi/ limo	2.3%	4.4%	12.3%	5.4%	13.8%	0.0%	0.0%	5.6%
Rental car	82.7%	74.4%	75.5%	77.2%	50.3%	62.1%	50.3%	74.9%
Ride share	4.3%	8.6%	18.4%	5.7%	15.3%	0.0%	4.3%	6.6%
Car share	6.6%	4.3%	0.0%	4.3%	5.7%	0.0%	0.0%	1.0%
Bicycle rental	3.8%	3.3%	0.0%	3.9%	1.1%	10.0%	0.0%	3.4%

KAUA'I ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	21.6%	16.3%	43.9%	15.1%	13.4%	10.0%	16.2%	10.3%
Visiting friends/ relatives	20.0%	14.4%	43.9%	13.1%	13.4%	10.0%	11.9%	6.9%
Giving back to the local community	2.1%	2.7%	0.0%	2.7%	0.0%	0.0%	4.3%	3.7%

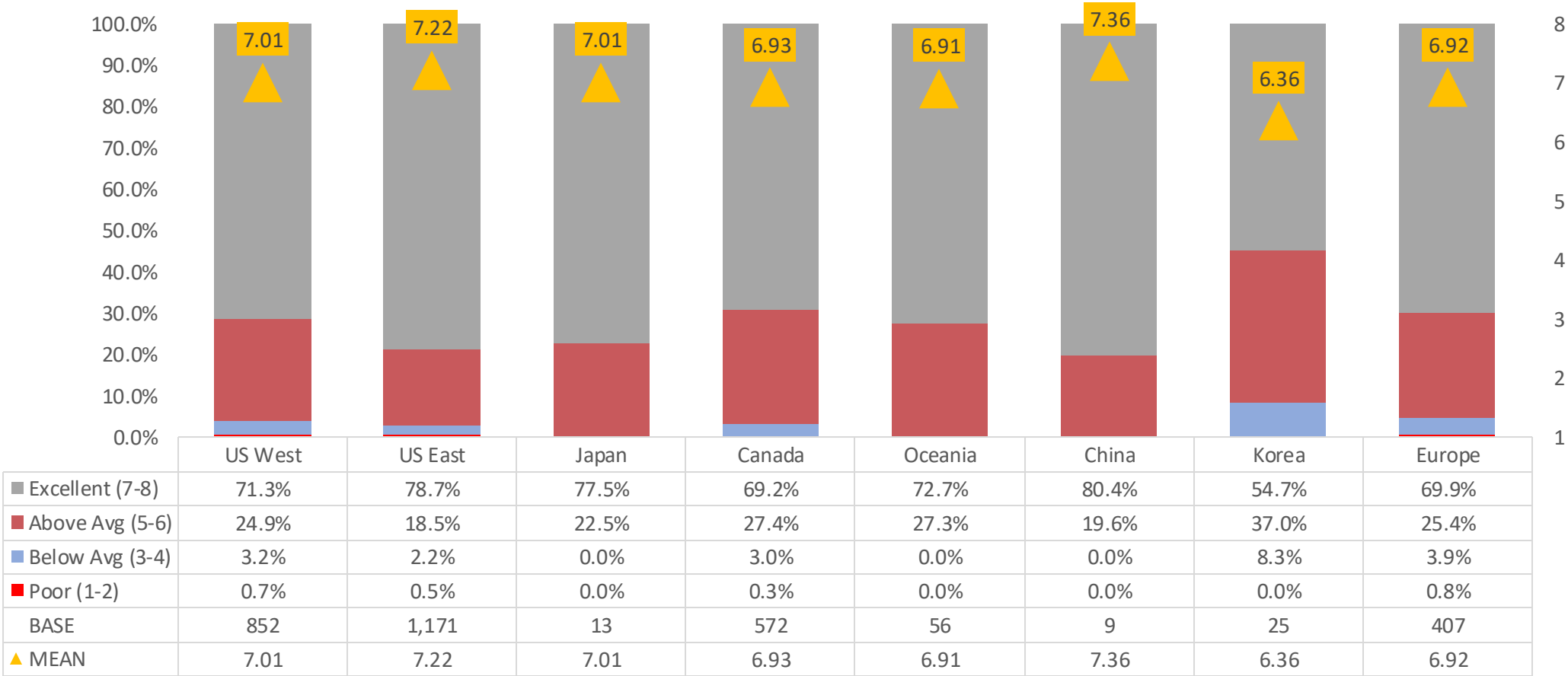
FRIENDLINESS OF KAUA'I RESIDENTS

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



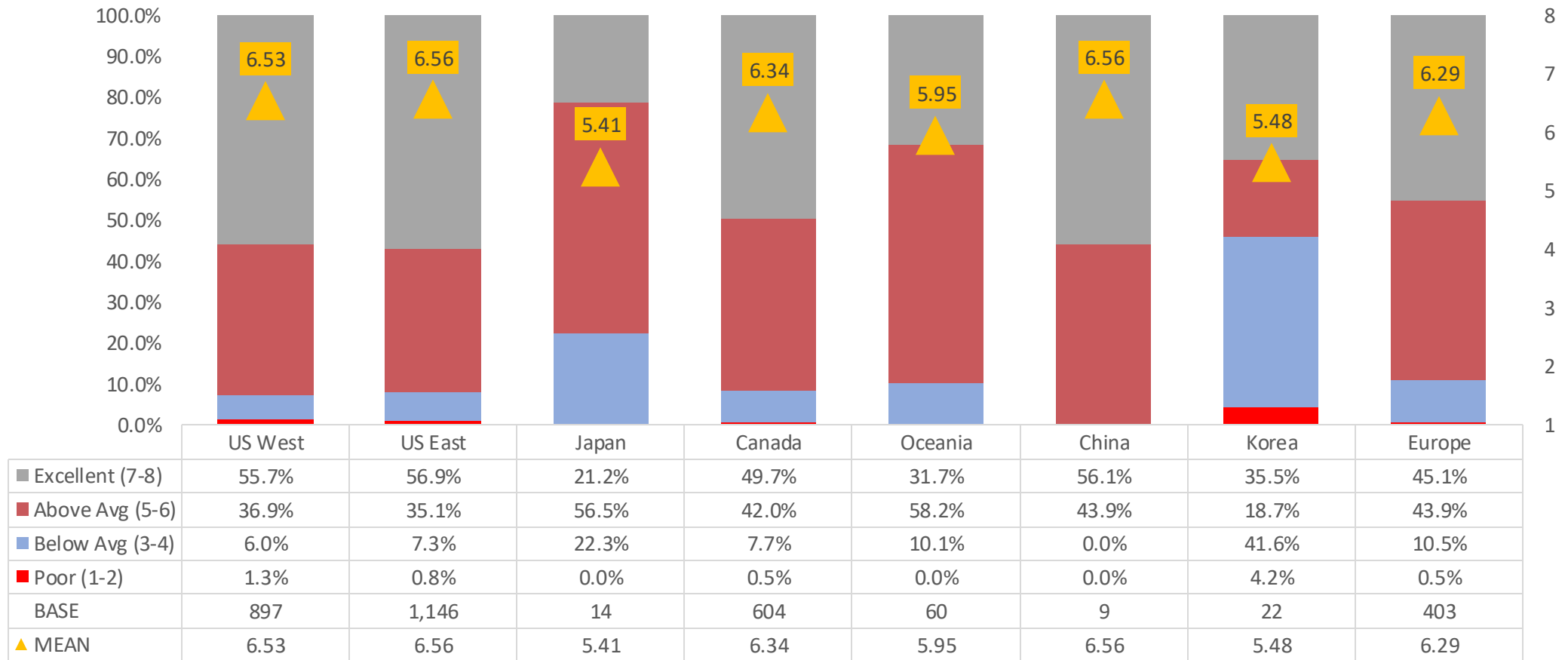
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



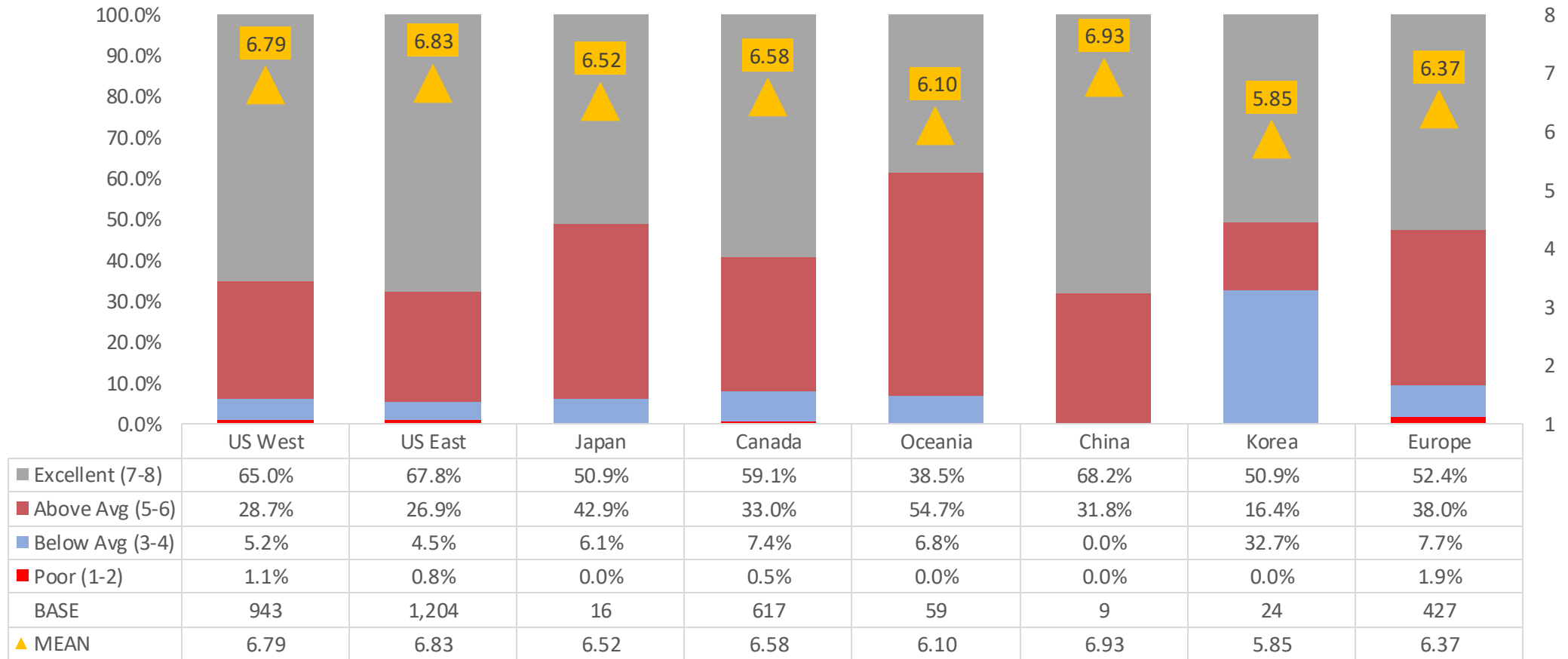
SHOPPING - KAUA'I

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



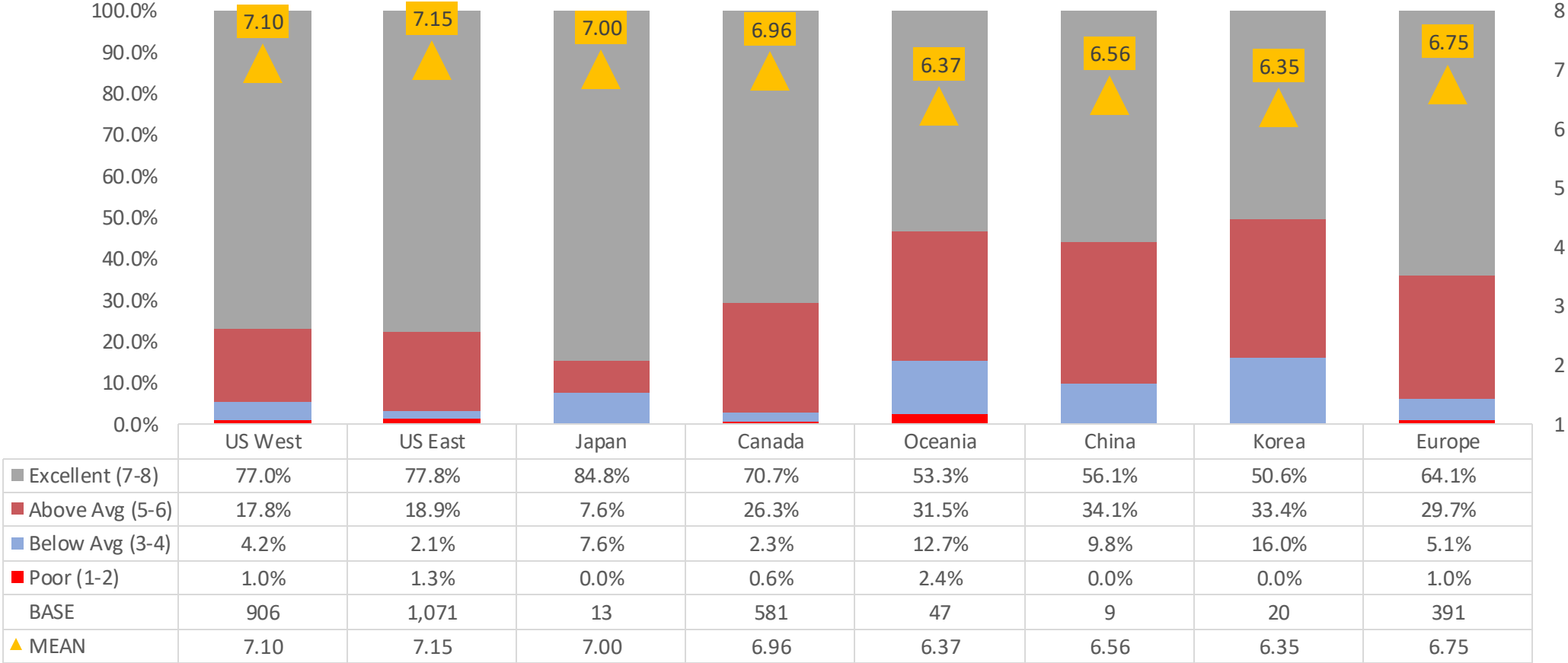
DINING/ FOOD & BEVERAGE - KAUA'I

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



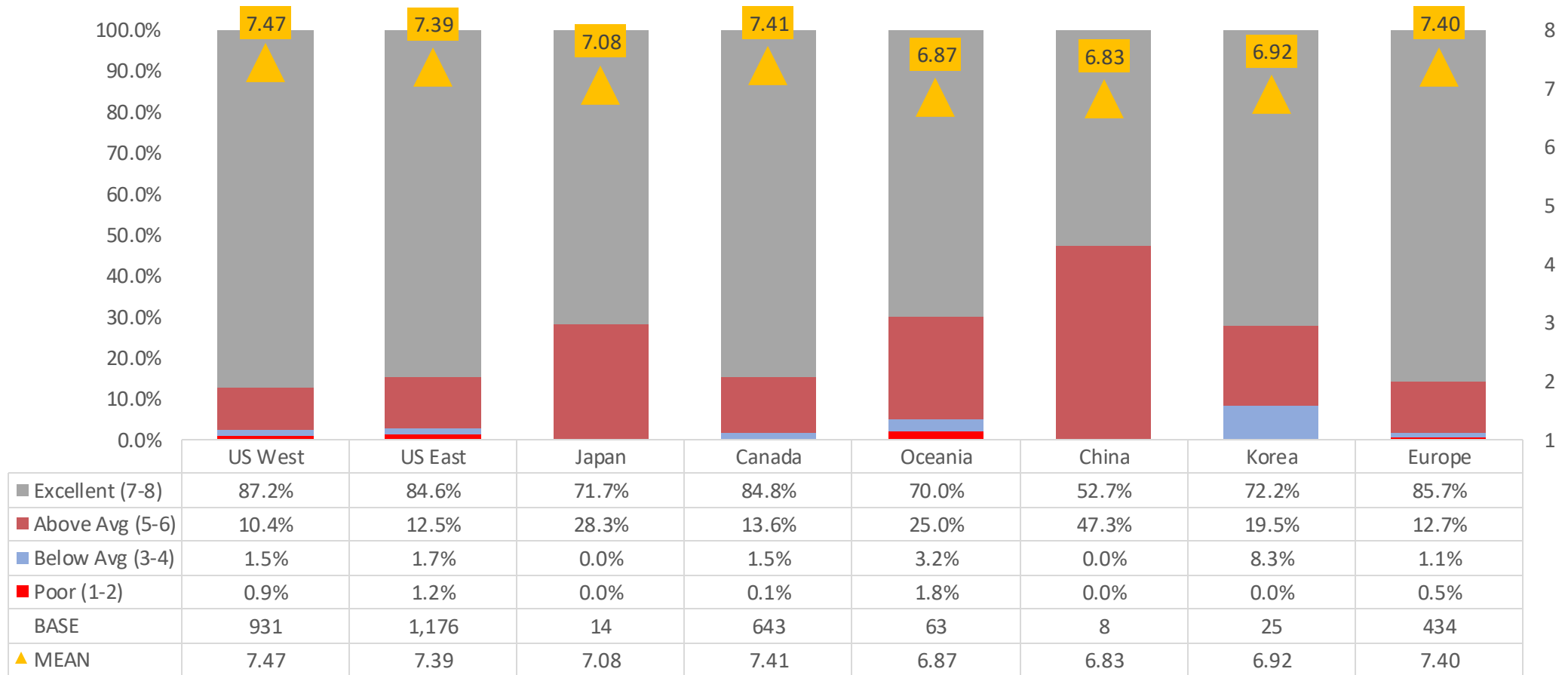
LODGING/ ACCOMMODATIONS - KAUA'I

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



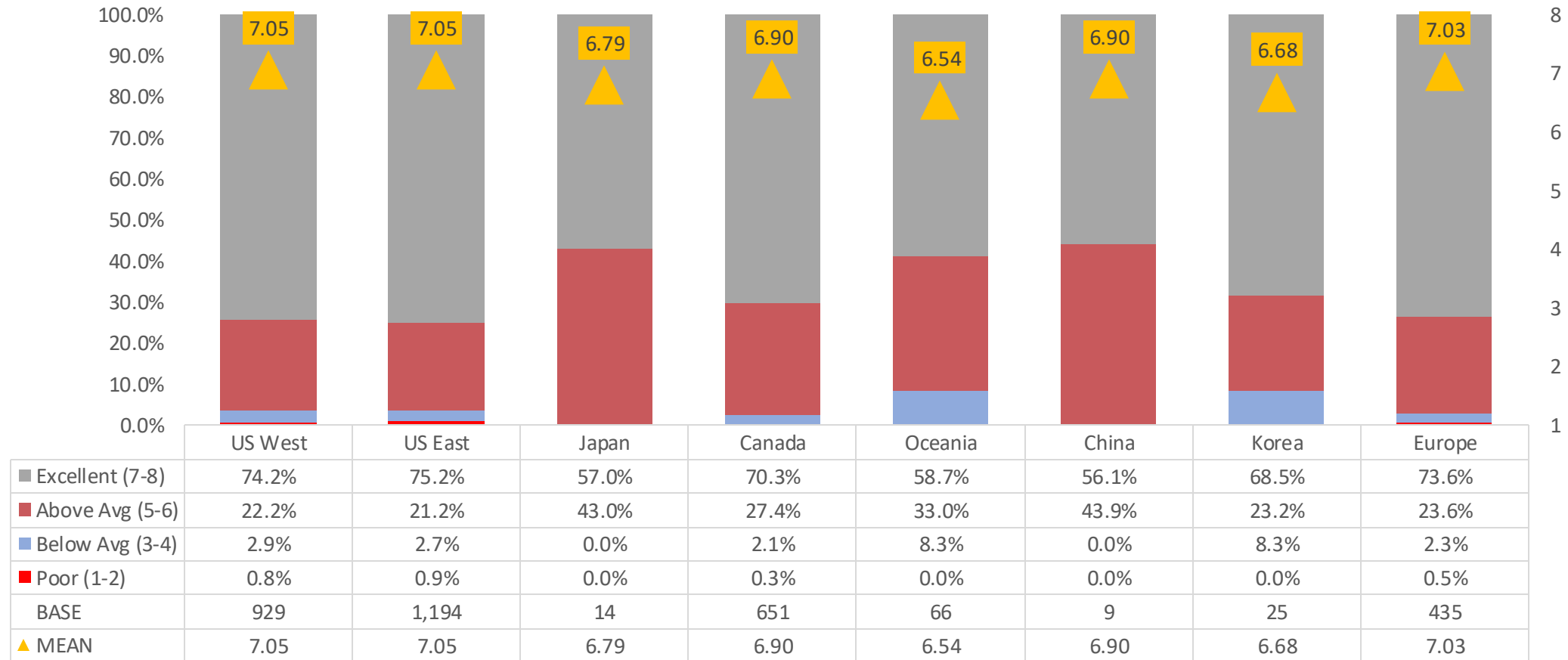
BEACHES - KAUA'I

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



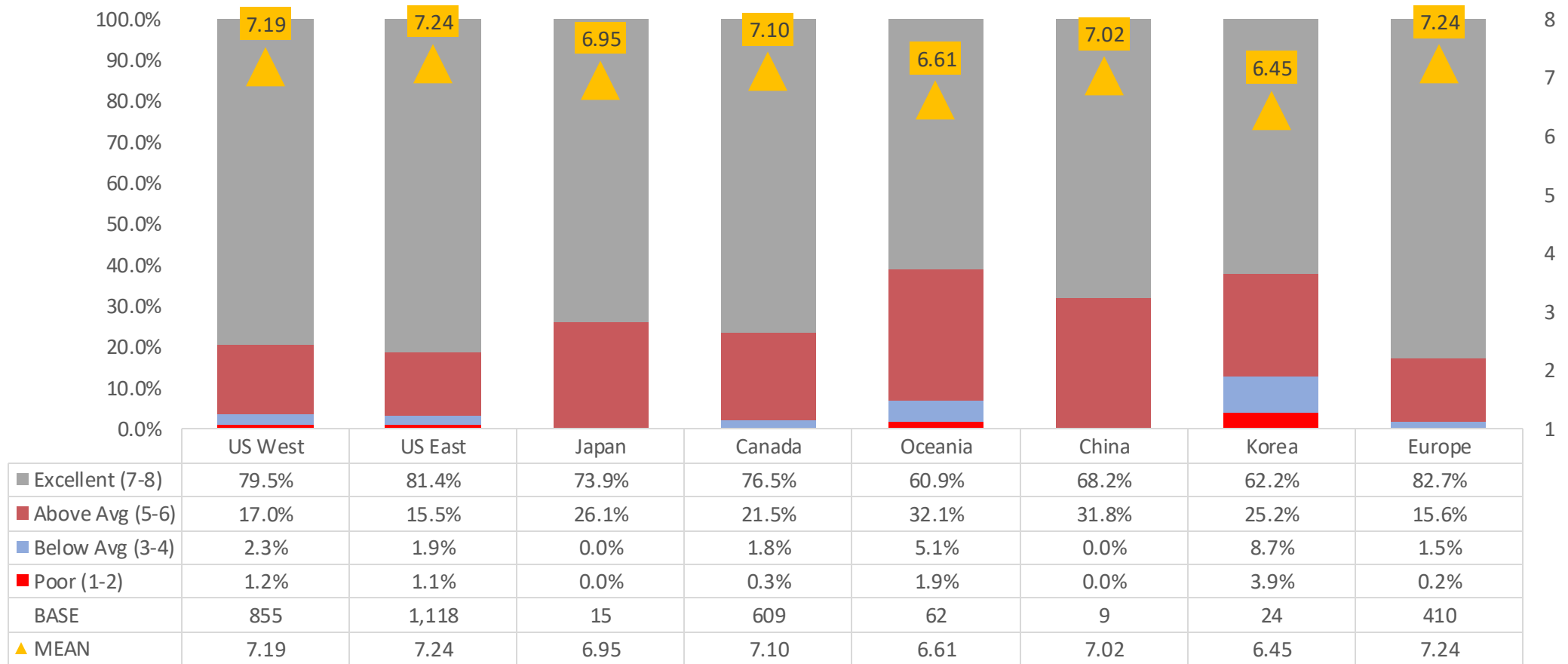
PUBLIC AREAS - KAUA'I

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



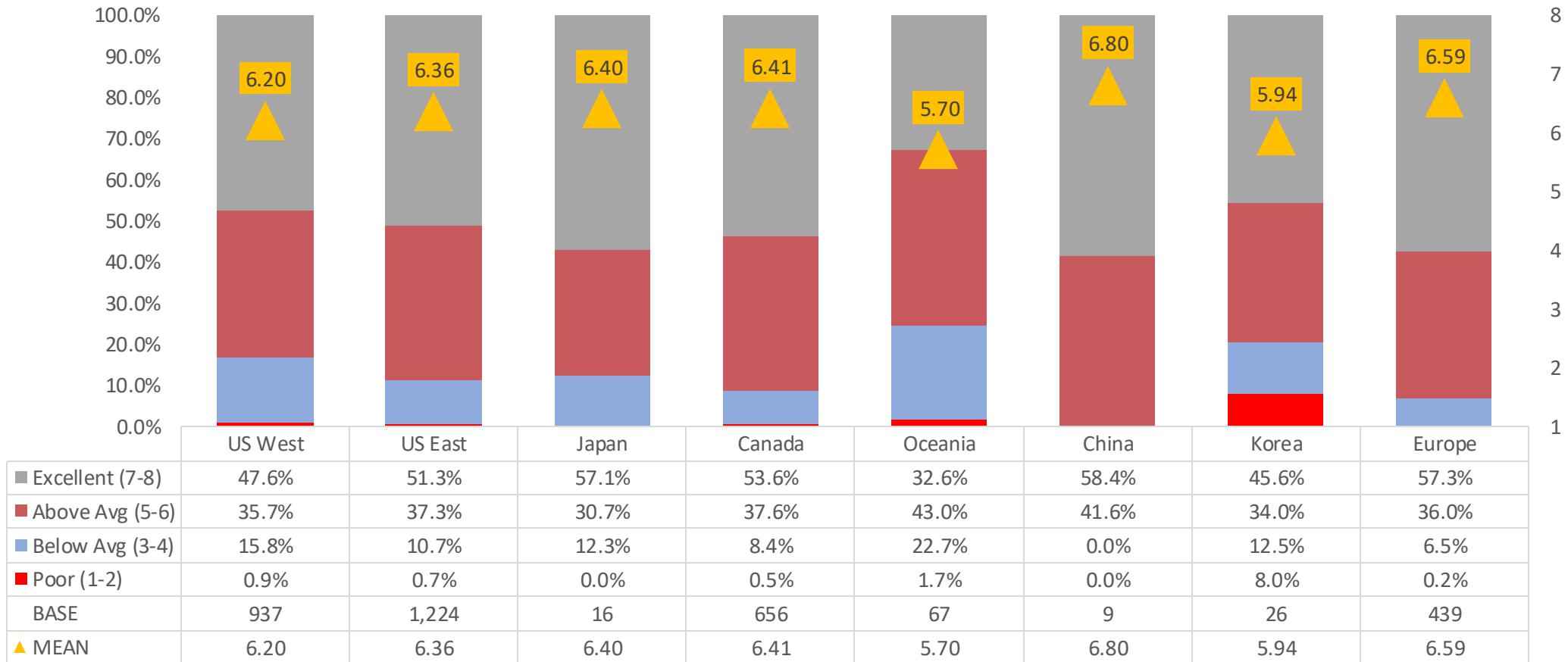
PARKS - KAUA'I

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



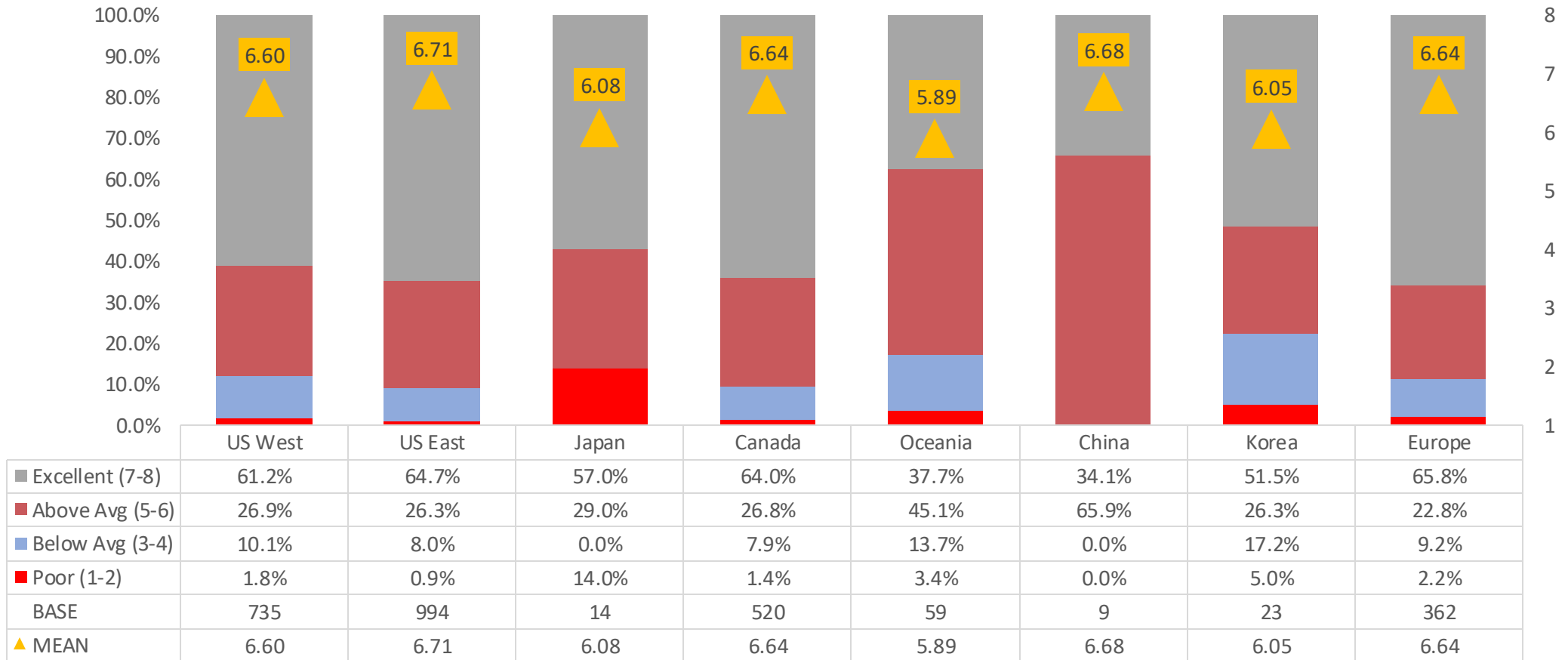
ROADS - KAUA'I

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



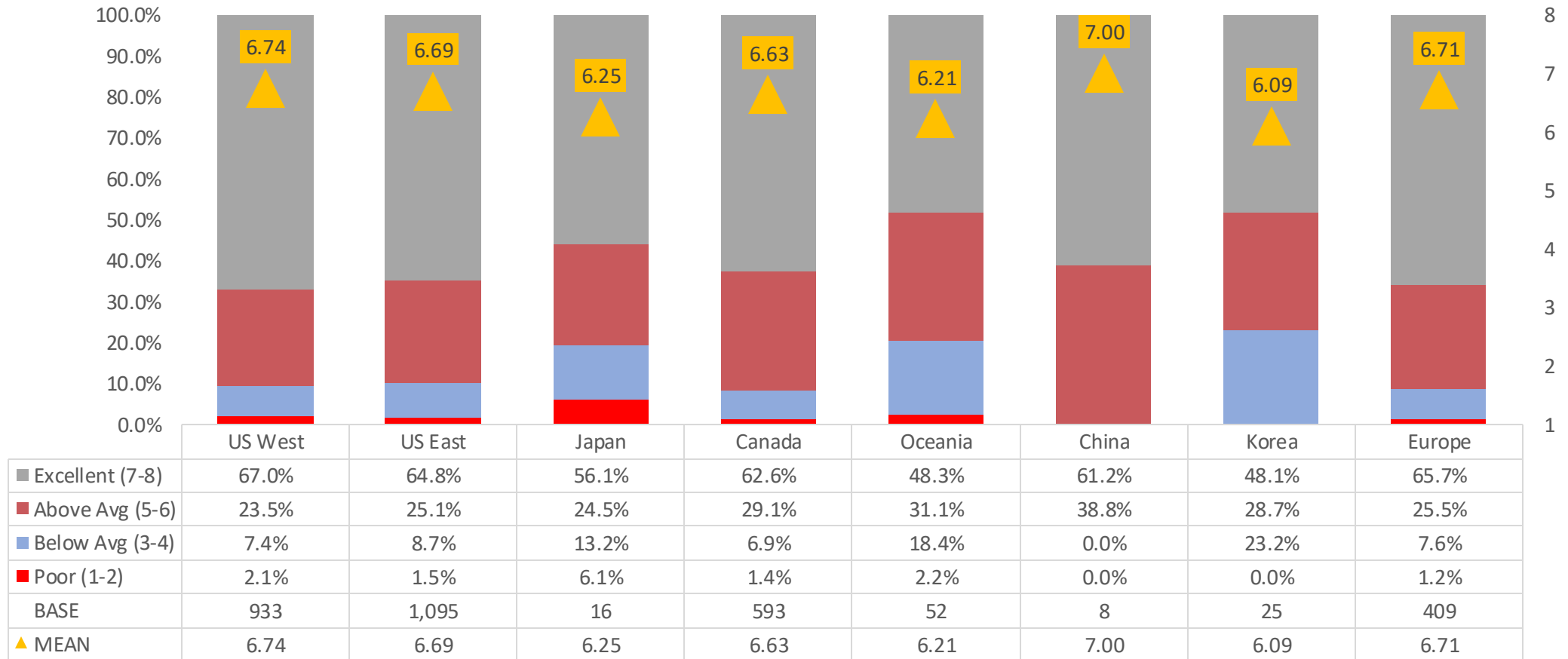
TRANSPORTATION ON ISLAND - KAUA'I

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



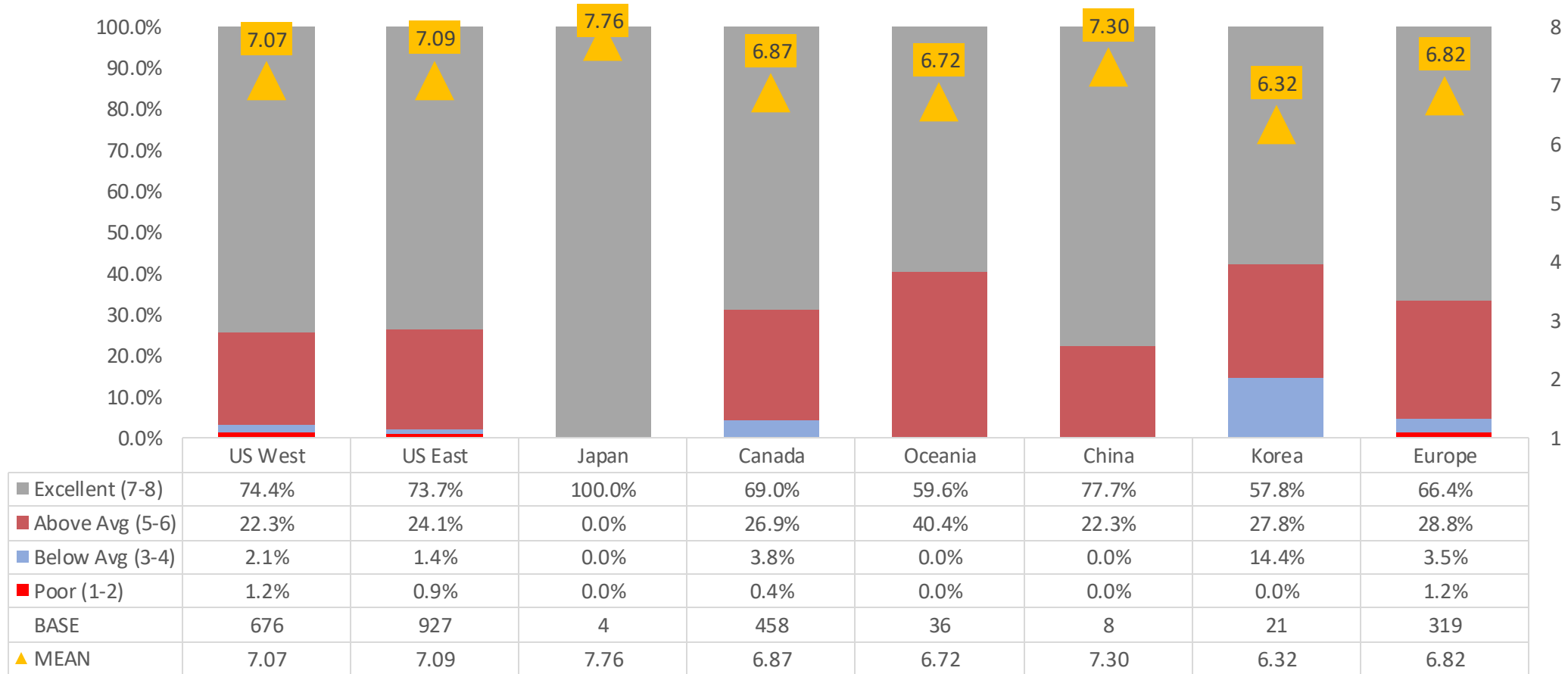
AIRPORT- KAUA'I

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



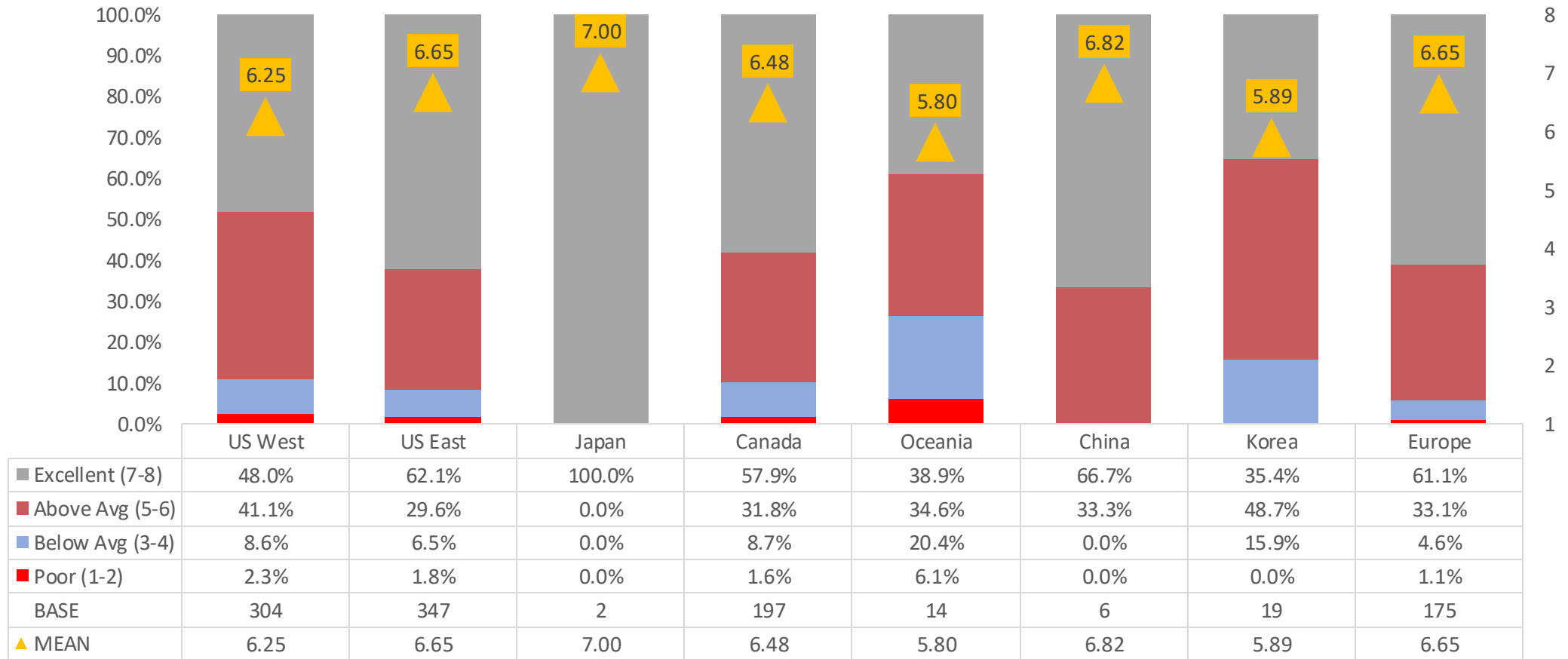
CULTURAL ACTIVITIES - KAUAI

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



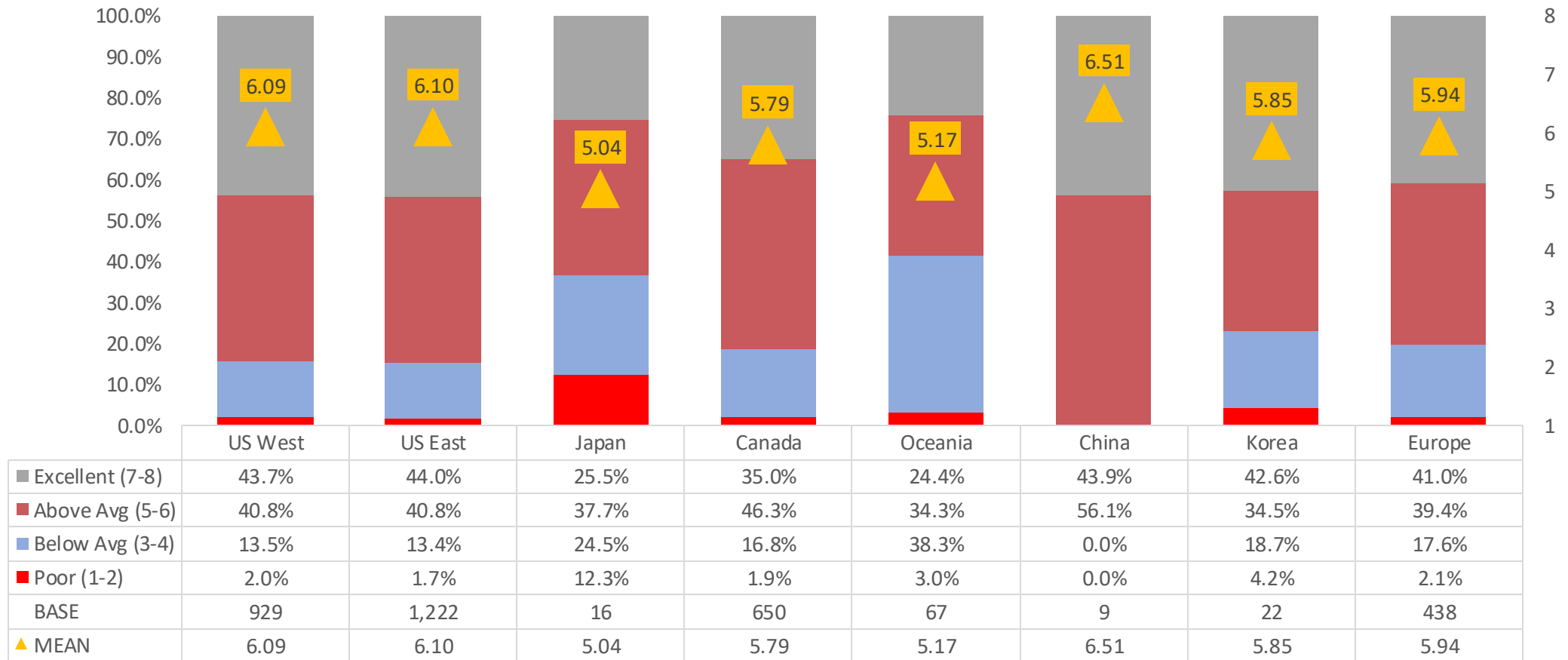
VOLUNTEER ACTIVITIES - KAUAI

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



VALUE FOR THE MONEY - KAUA'I

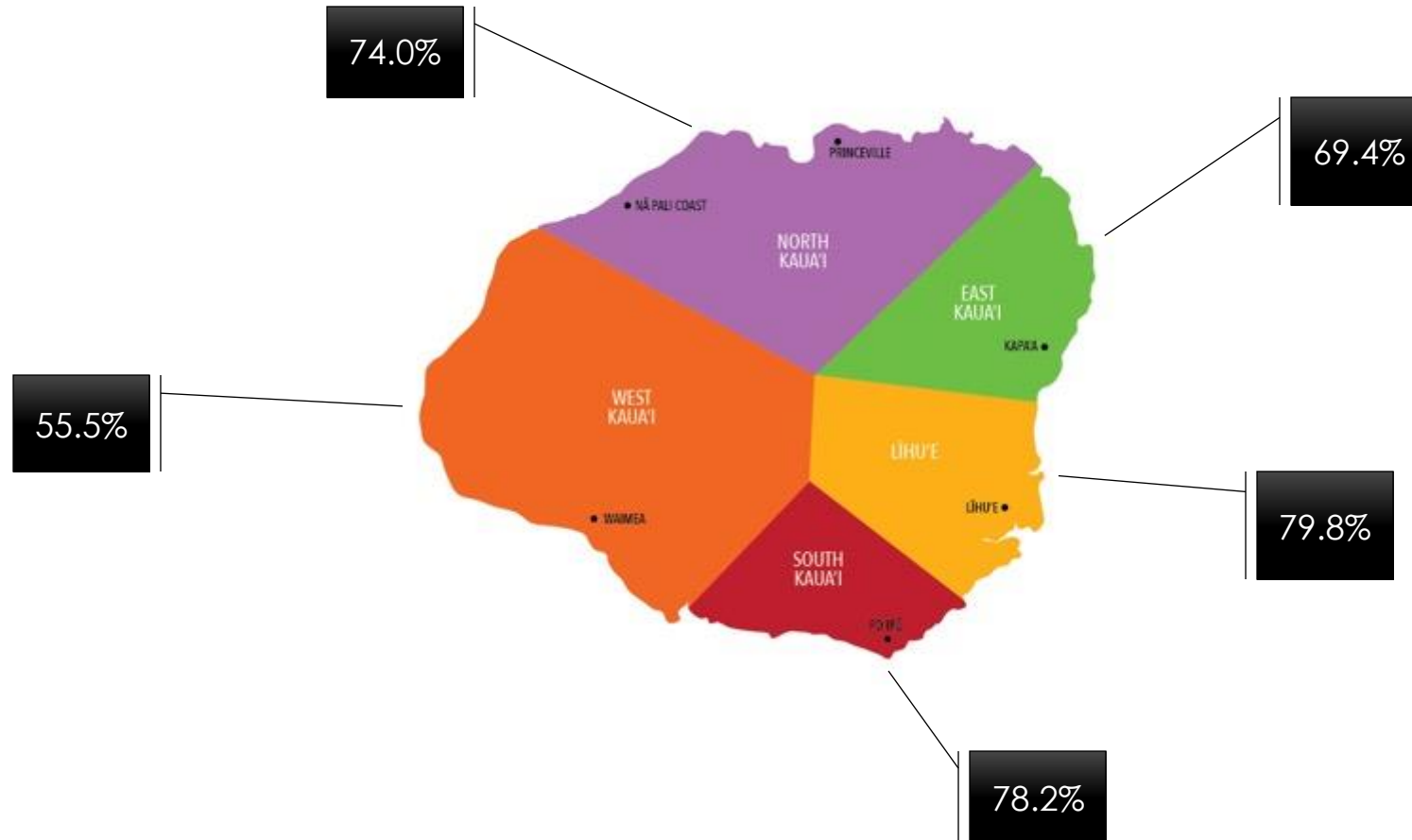
8-pt Rating Scale
8 = Excellent / 1 = Poor



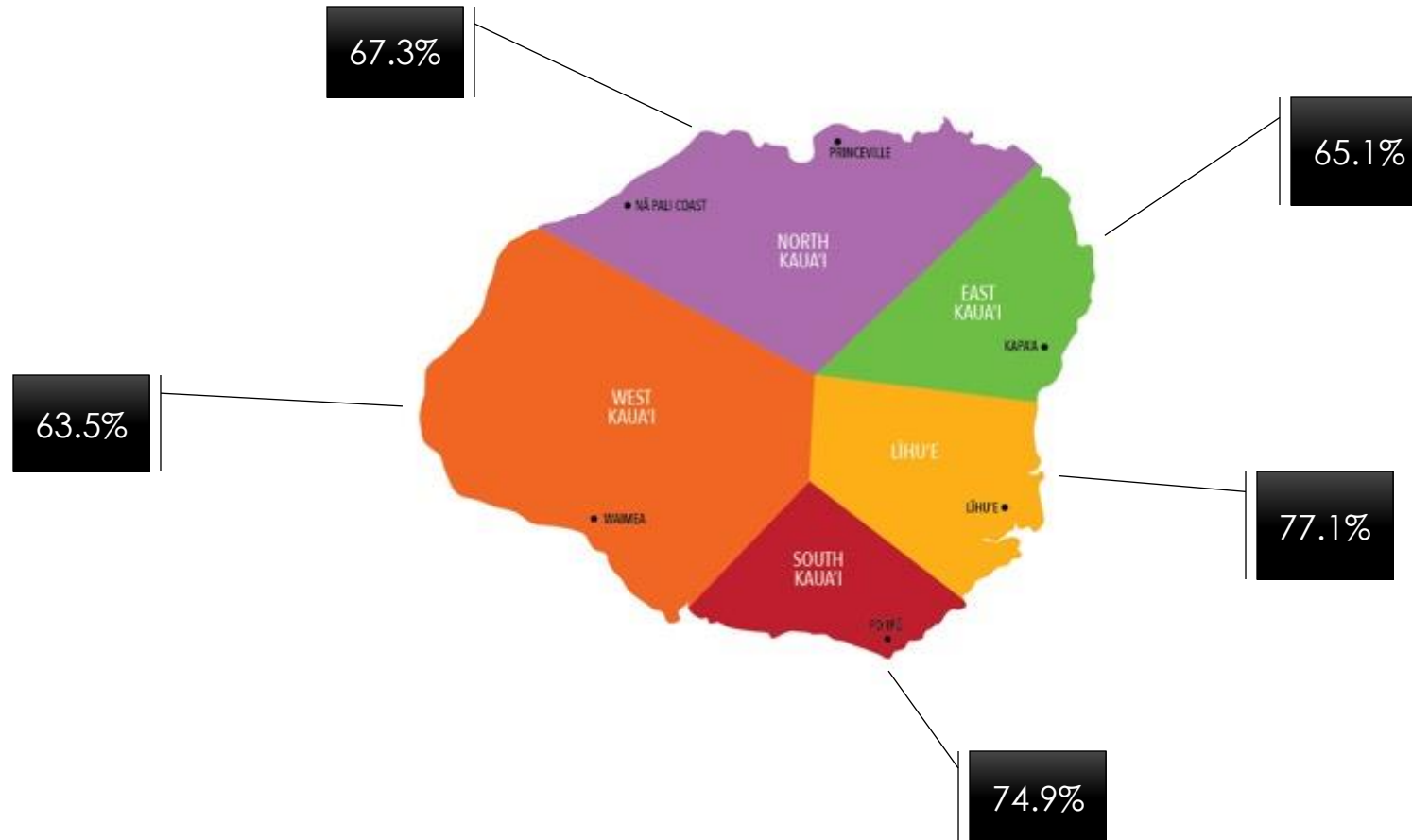
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	47.6%	28.5%	24.5%	32.5%	11.6%	9.8%	4.3%	11.8%
Friend recommendation	25.2%	27.8%	37.7%	29.4%	26.2%	22.0%	31.5%	25.4%
Cruise line stop/ part of tour	1.6%	12.8%	0.0%	10.4%	28.8%	22.0%	0.0%	9.9%
Visiting friends/ relatives	5.7%	4.2%	6.1%	2.9%	4.3%	0.0%	7.7%	2.4%
Social media post	2.6%	2.9%	6.1%	2.9%	2.7%	34.1%	13.7%	7.0%
Article/ blog	1.6%	3.6%	12.3%	4.2%	8.9%	0.0%	6.9%	15.3%
Attending conference/ event	2.4%	2.3%	7.1%	4.4%	1.6%	0.0%	4.3%	1.1%
Location/ never been, but went to other islands	2.2%	2.7%	6.1%	2.5%	2.3%	0.0%	0.0%	1.8%
Travel agent	1.4%	3.0%	0.0%	1.2%	4.7%	0.0%	20.6%	12.9%

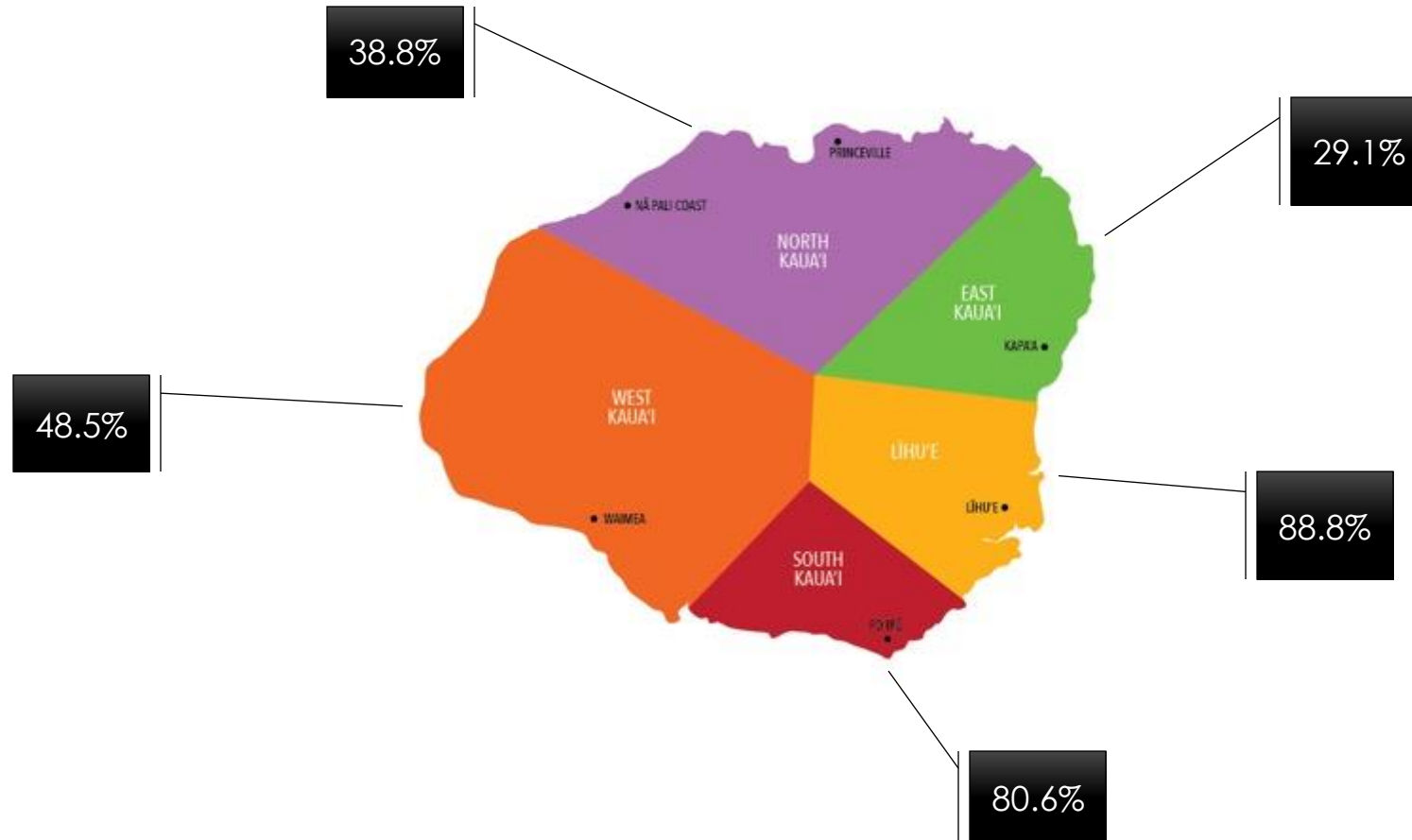
AREAS VISITED - KAUA'I U.S. WEST



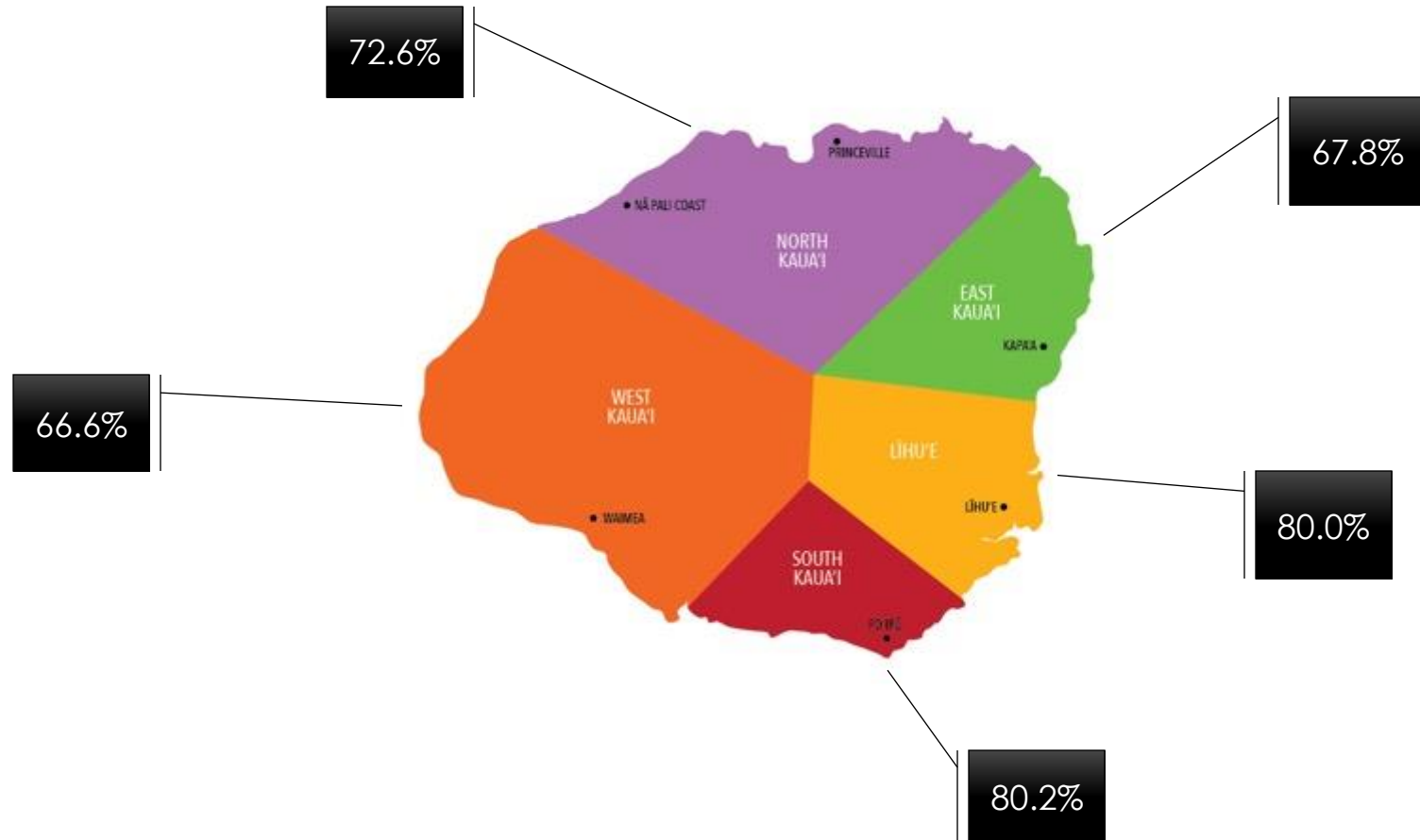
AREAS VISITED - KAUA'I U.S. EAST



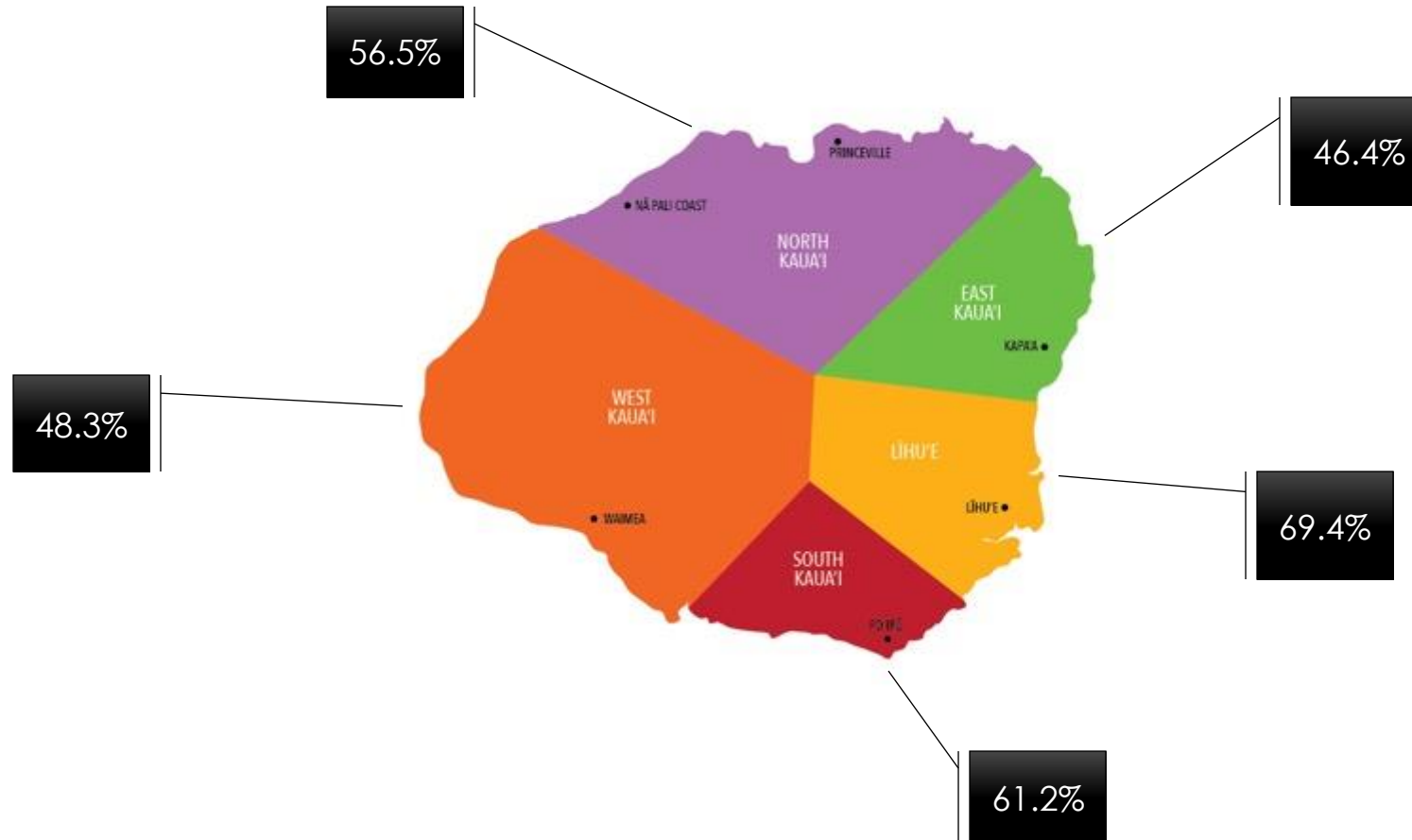
AREAS VISITED - KAUA'I JAPAN



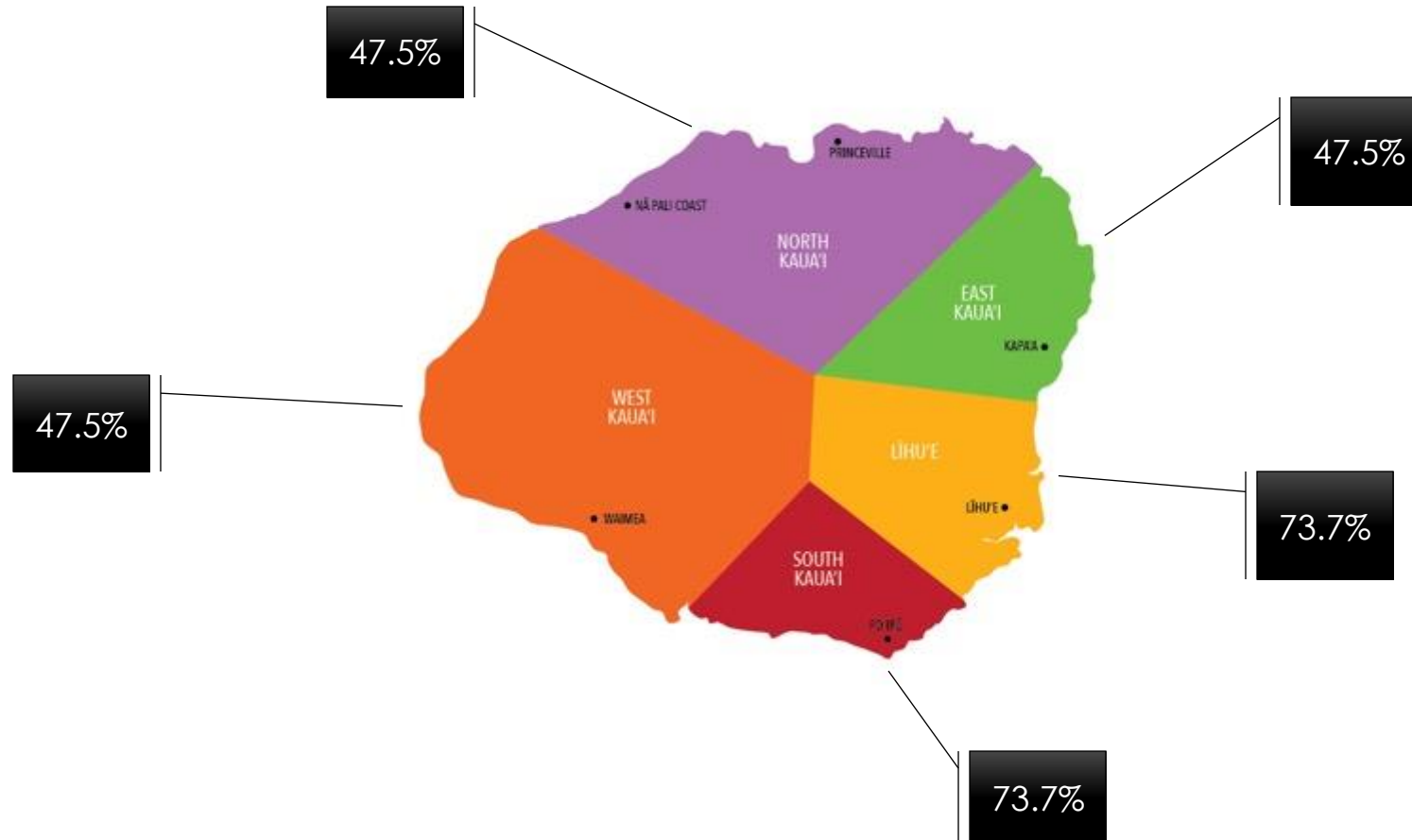
AREAS VISITED - KAUA'I CANADA



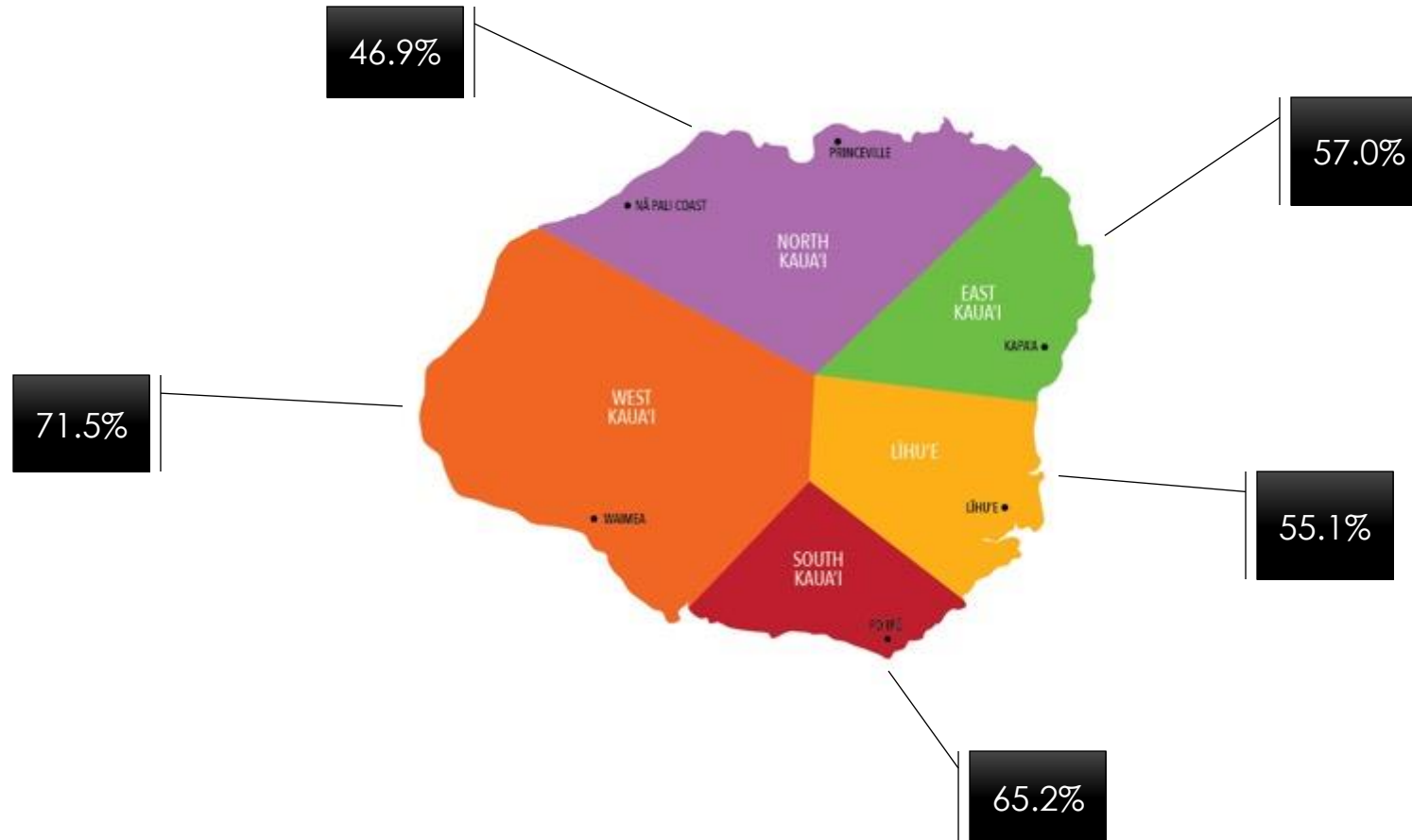
AREAS VISITED - KAUA'I OCEANIA



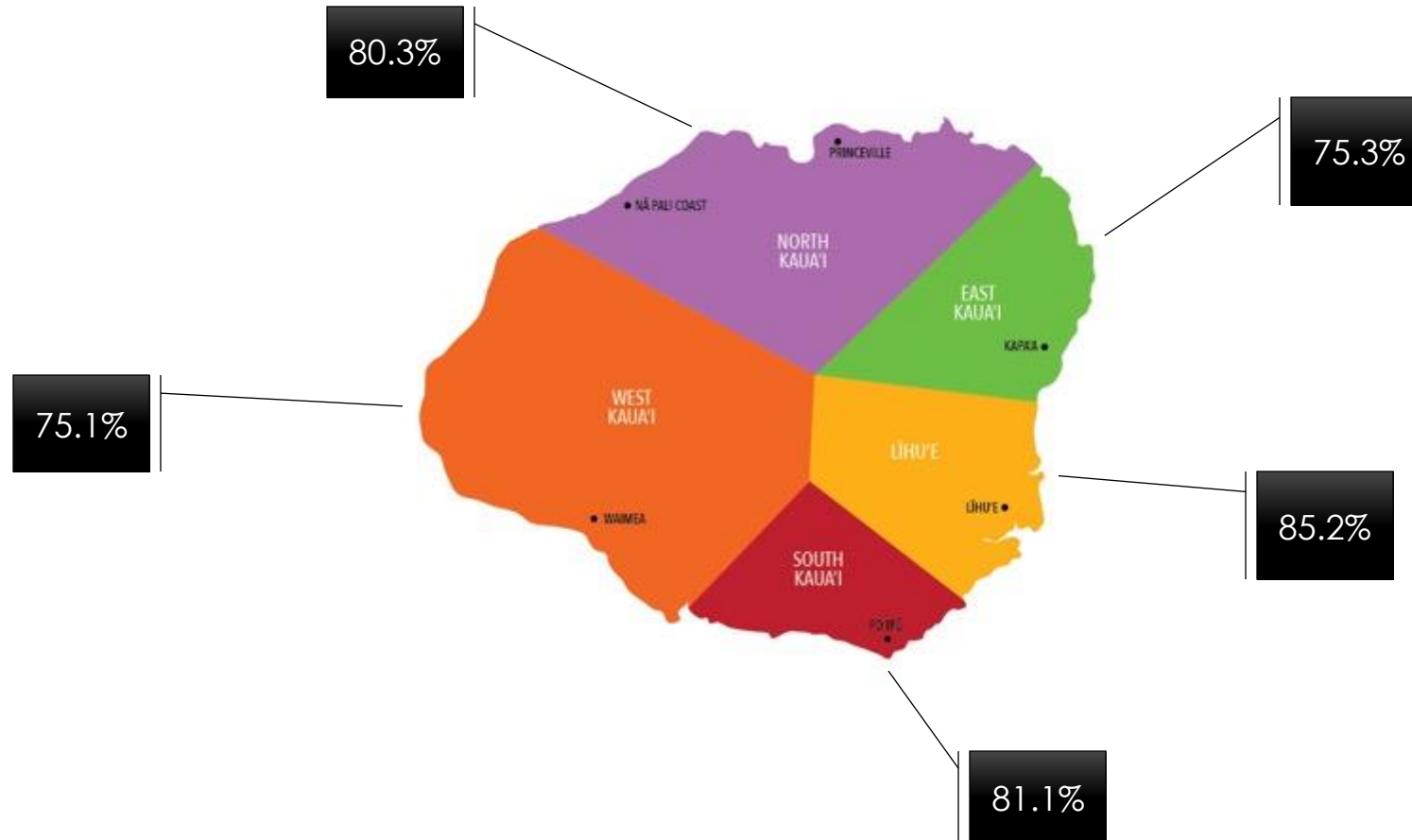
AREAS VISITED - KAUA'I CHINA



AREAS VISITED - KAUA'I KOREA

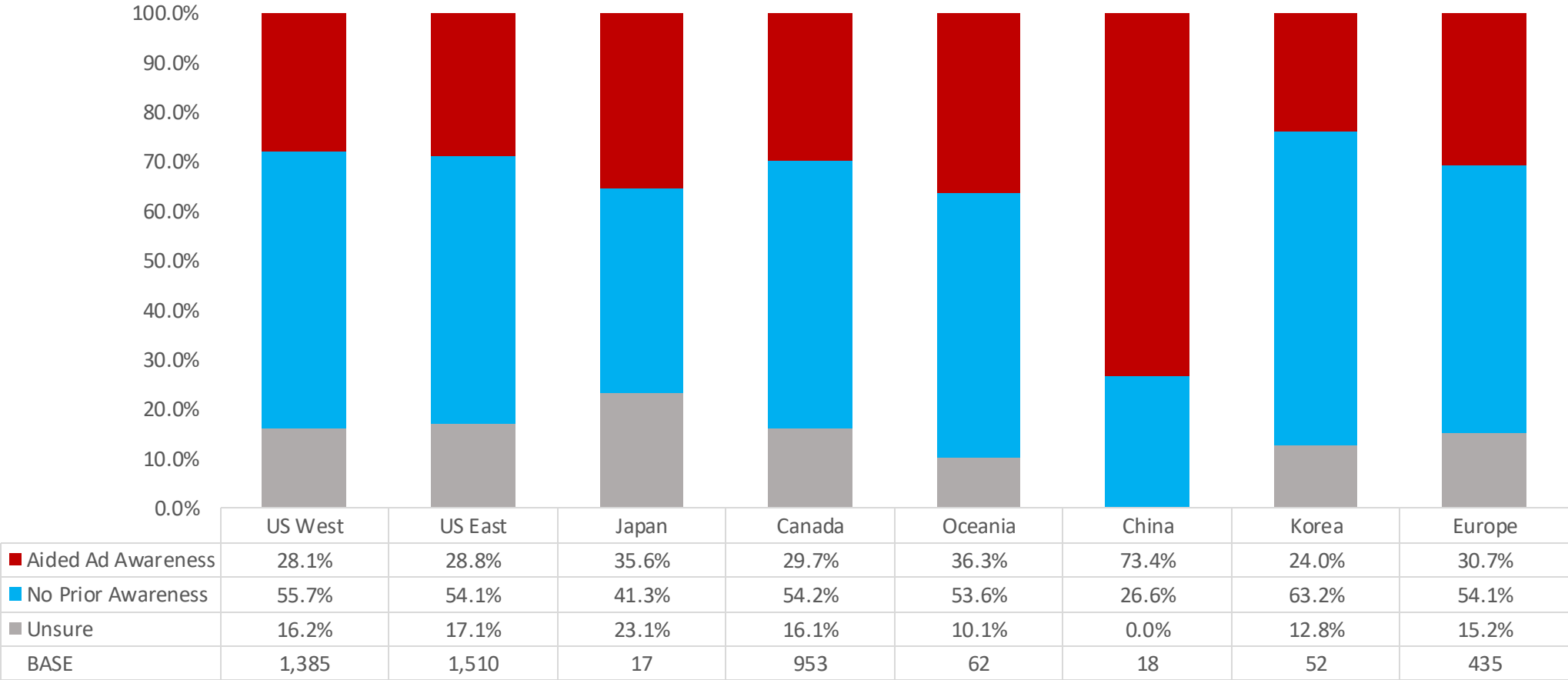


AREAS VISITED - KAUA'I EUROPE



Section 23 – Maui

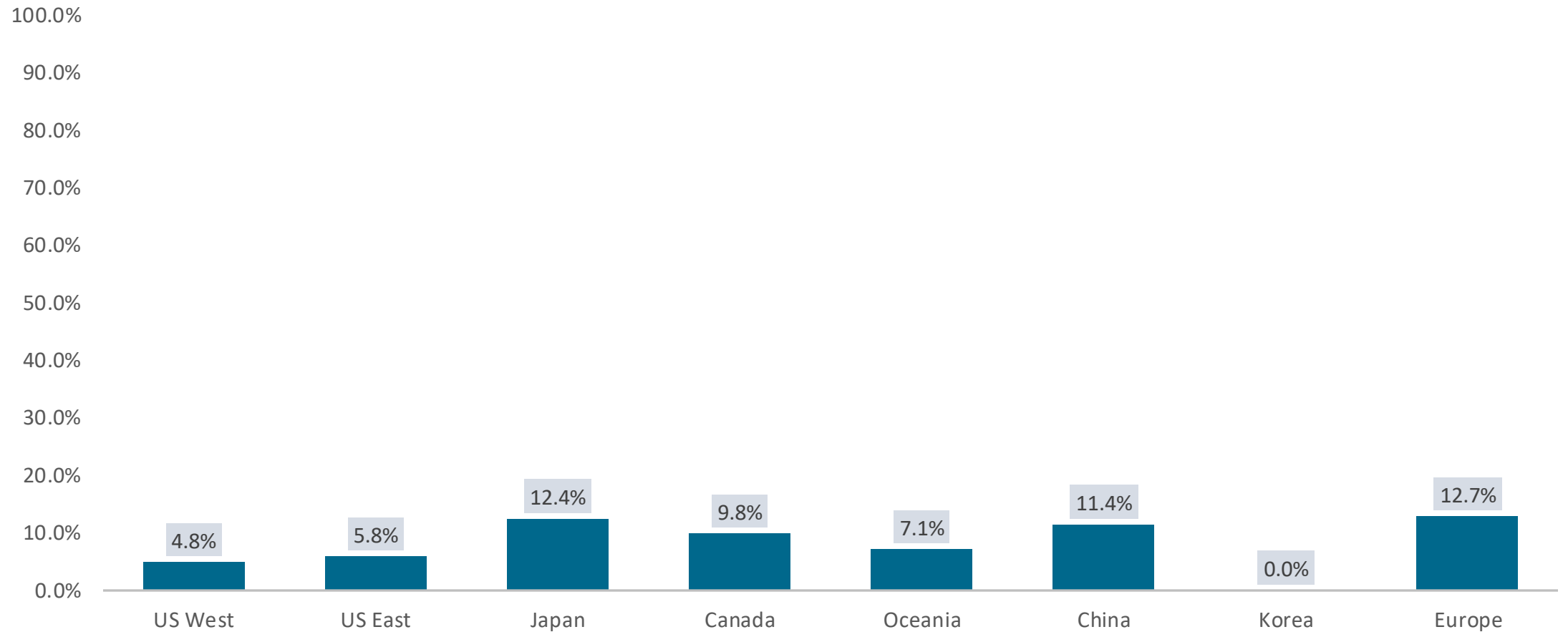
AIDED ADVERTISING AWARENESS - MAUI



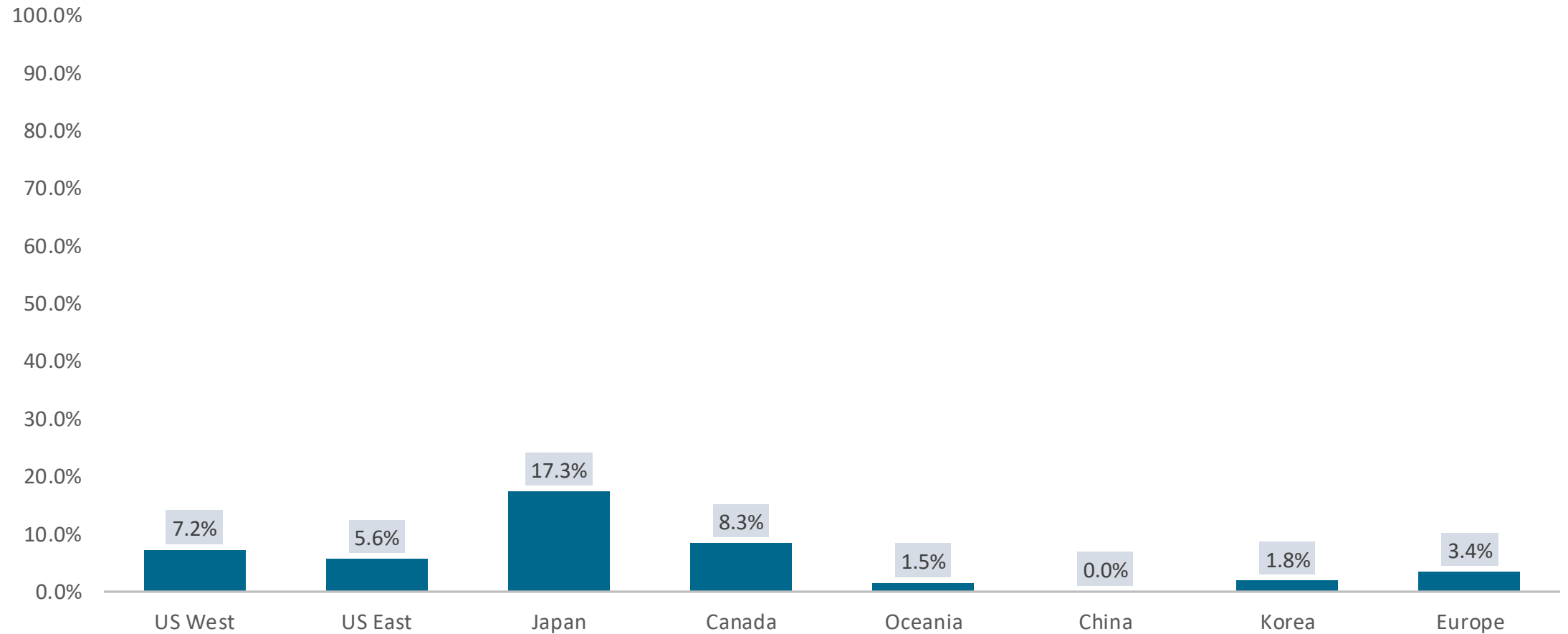
AIDED ADVERTISING AWARENESS - MAUI

- ***Trips to Hawai'i:*** Repeat visitors from **U.S. West** were more likely to recall advertising for Maui compared to first-time visitors from this market.
- ***Age:*** Advertising awareness for Maui was highest among older visitors (seniors 65+) from **U.S. West** and **U.S. East**.
- ***Islands visited:*** Visitors from **U.S. West**, **U.S. East** and **Canada** who stayed on multiple islands were more likely to be exposed to advertising related to Maui than those who spent their entire trip on Maui.
- ***Gender:*** Female respondents from **U.S. West** were more likely to recall marketing for Maui than males from this visitor market.
- ***Household income:*** Advertising awareness among visitors from **U.S. West** and **U.S. East** was highest among those with household income in the bottom tier (<\$100K). Advertising awareness declined among more affluent visitors.
- ***Education:*** Respondents without a college degree from **U.S. West** were more likely to recall advertising for Maui than those with a college degree.

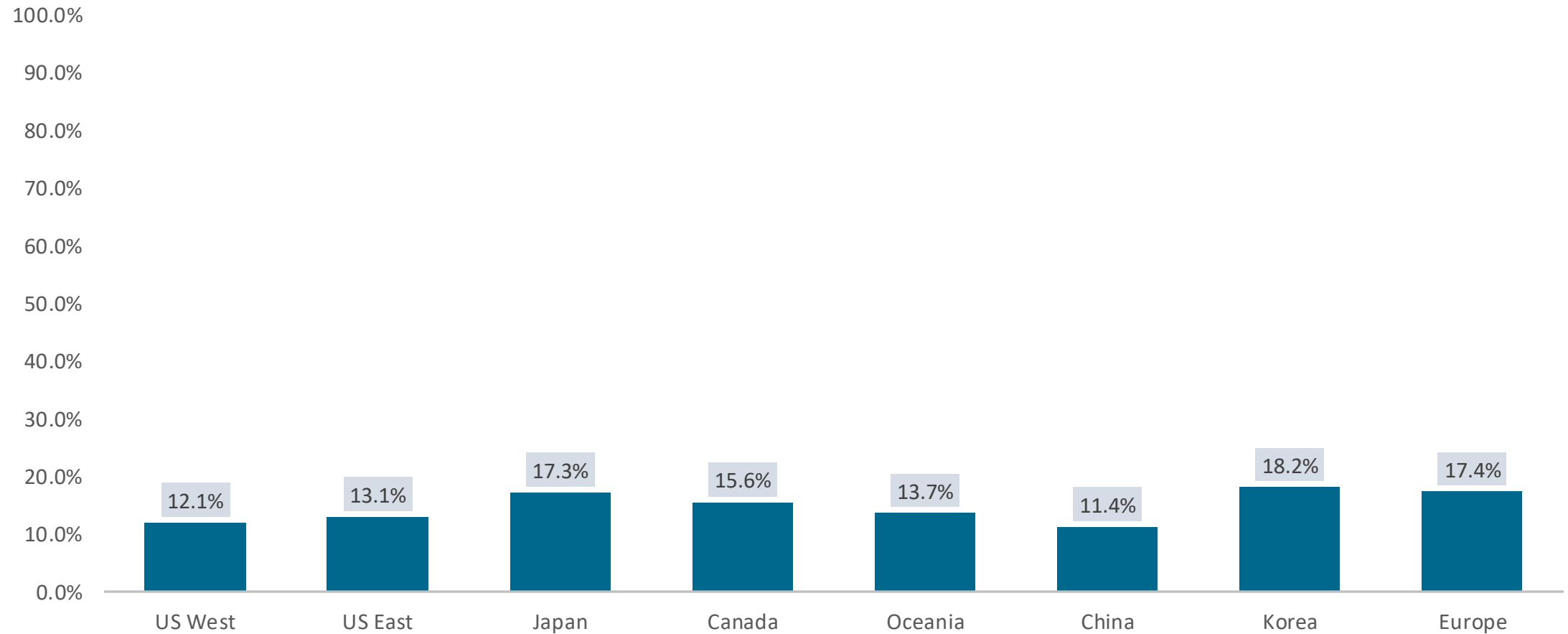
IMPACT OF LOCATION FILMING - MAUI



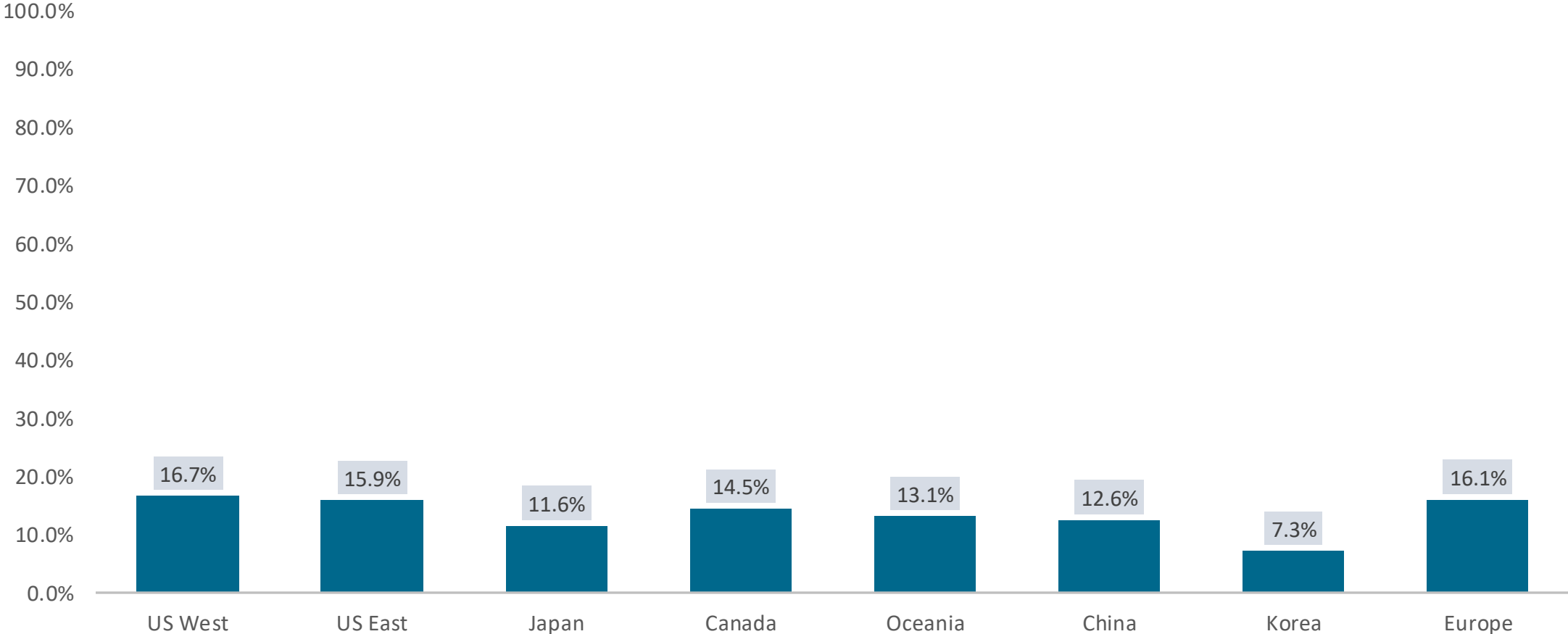
IMPACT OF HAWAIIAN MUSIC - MAUI



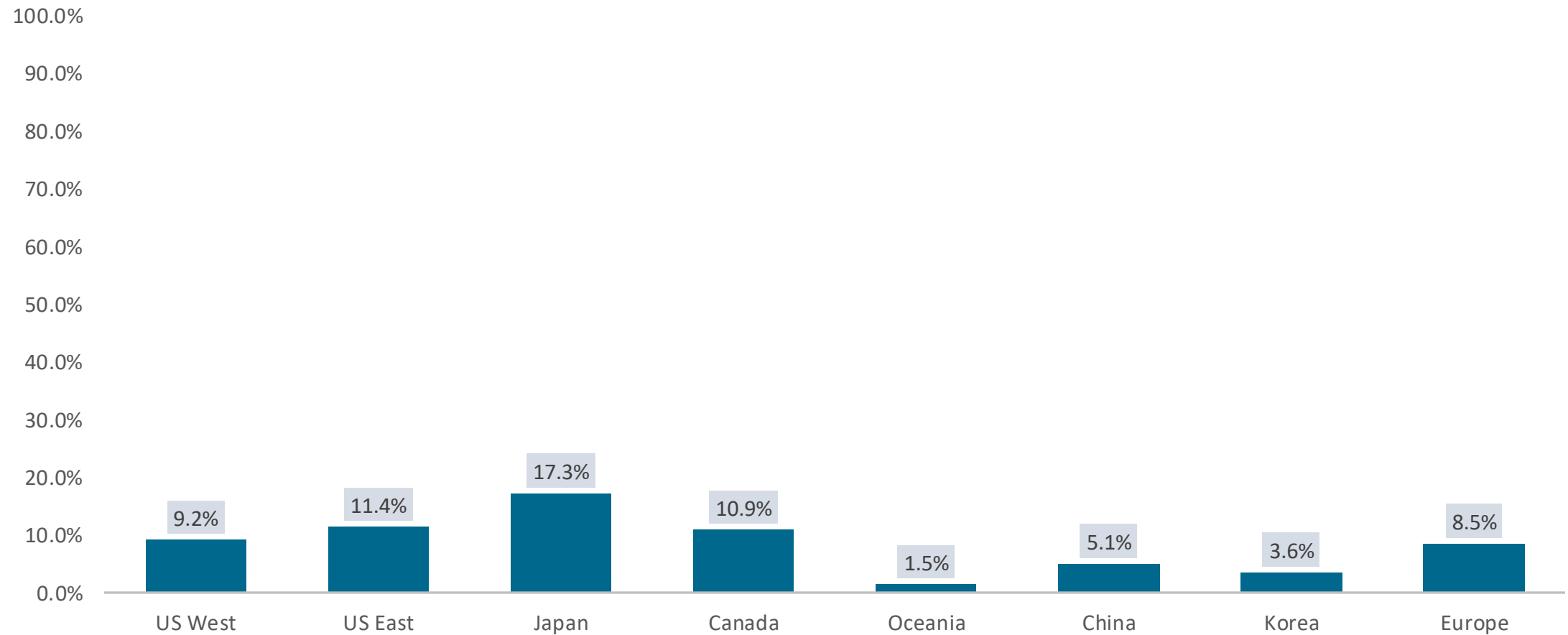
IMPACT OF SOCIAL MEDIA POSTS/ VIDEOS - MAUI



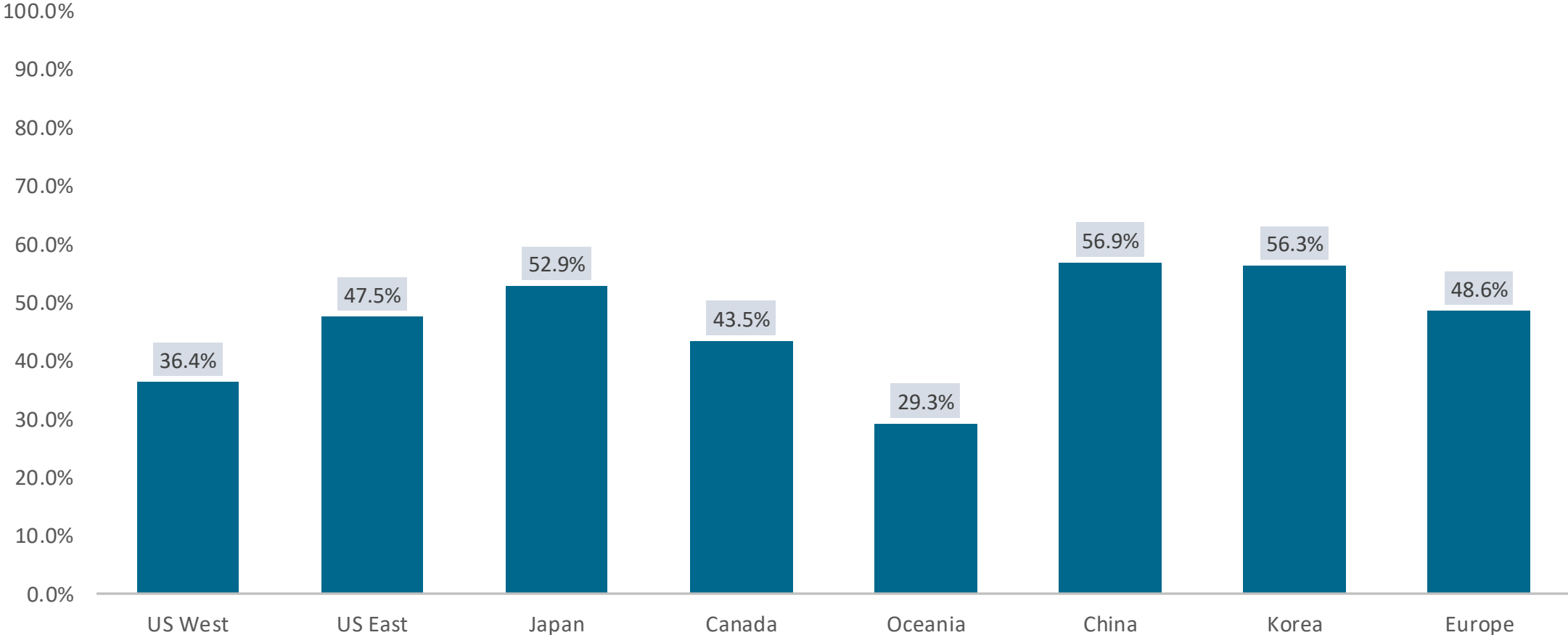
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - MAUI



IMPACT OF HAWAIIAN CULTURAL EVENTS - MAUI



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - MAUI



1st TIME VS REPEAT VISITOR - MAUI



1st TIME VS REPEAT VISITOR - MAUI

- **Gender:** Male visitors from **U.S. West** had traveled to Maui more often than females from this market.
- **Age:** The number of trips to Maui by visitors from **U.S. West, U.S. East** and **Canada** increased among older respondents, especially with seniors, 65+.
- **Islands visited:** **U.S. West, U.S. East,** and **Canada** visitors who spent their entire time on Maui had been to the island more often in the past, compared to those whose most recent trip also included stops on other islands.
- **Household income:** Among **U.S. East** visitors, the number of trips to Maui increased as respondents became more affluent.
- **Travel party size:** Those in smaller travel parties (1-2 persons) from **U.S. West** and **U.S. East** had visited Maui more often.
- **Education:** College graduates from **U.S. West** had been to Maui more often compared to those without a college degree from this visitor market.

STRENGTHS/ POSITIVE ASPECTS - MAUI

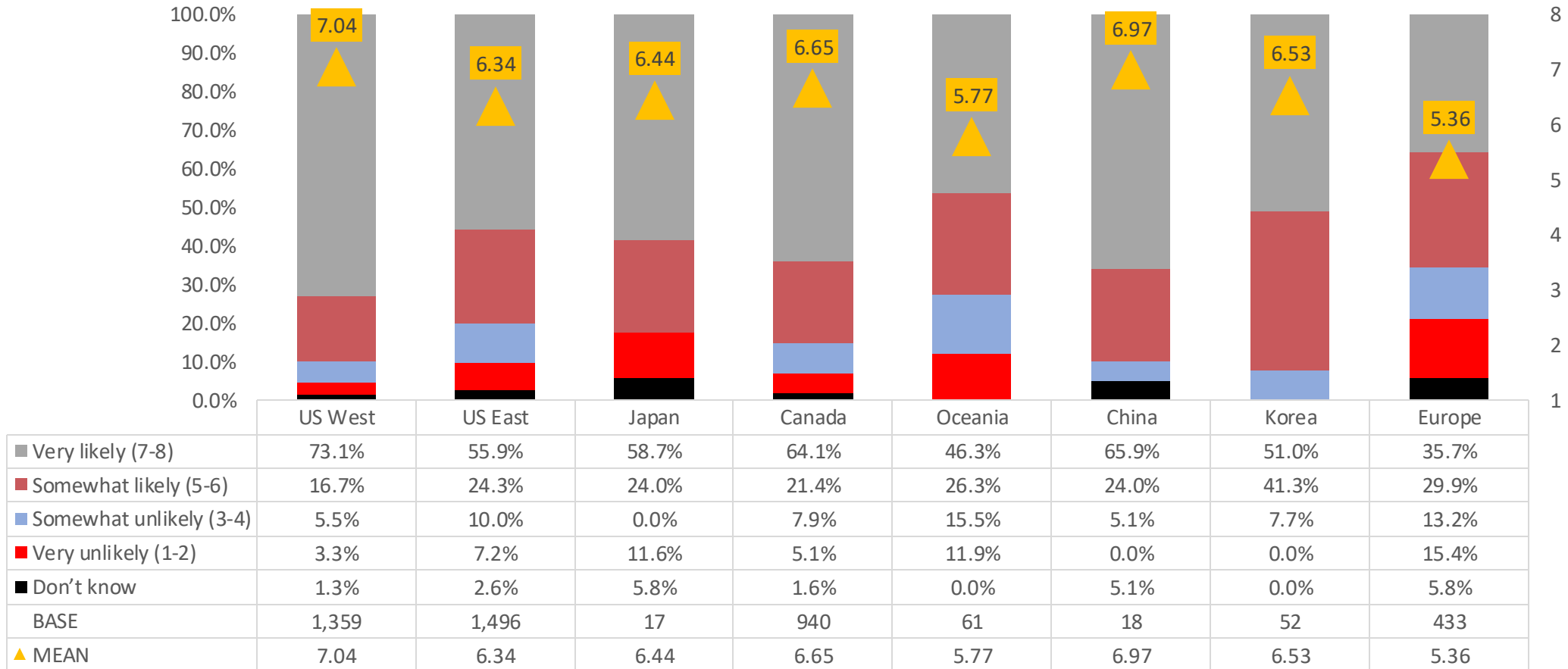
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Beach/ ocean	21.8%	15.6%	17.3%	24.7%	17.5%	12.6%	15.5%	17.5%
Nature/ natural beauty/ scenery	16.3%	22.7%	28.9%	17.3%	15.0%	32.9%	39.1%	28.7%
Feeling of the "Aloha Spirit"	13.3%	10.4%	0.0%	12.2%	5.7%	11.4%	4.1%	13.1%
Variety of activities/ attractions/ many choices	9.8%	12.8%	12.4%	11.2%	9.3%	15.2%	13.2%	11.4%
Friendliness of the local people	7.1%	7.4%	17.3%	6.9%	10.8%	0.0%	7.3%	8.8%
Accommodations/ was as promised	4.1%	4.0%	12.4%	4.1%	5.2%	11.4%	0.0%	2.3%
Events/ celebrations with friends/ family	4.1%	4.4%	0.0%	2.9%	4.6%	0.0%	1.8%	3.0%
Food/ restaurant/ good service	4.6%	3.0%	0.0%	3.3%	6.7%	5.1%	0.0%	2.1%
Overall customer service/ hospitality/ the people	3.8%	4.6%	5.8%	2.7%	7.7%	0.0%	0.0%	1.2%
Local culture/ people/ music	2.6%	3.5%	5.8%	2.1%	0.0%	6.3%	1.8%	3.7%

AREAS OF OPPORTUNITIES - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	48.0%	49.5%	47.1%	43.2%	43.3%	45.5%	27.3%	42.4%
Would like to experience more local culture	7.1%	6.9%	5.8%	7.2%	8.2%	6.3%	10.0%	7.2%
Traffic (congested/slow)	6.5%	6.5%	0.0%	4.8%	4.6%	0.0%	7.7%	2.1%
Cost/Expensive (specific/non-specific)	5.1%	4.3%	11.6%	11.9%	7.7%	0.0%	1.8%	7.8%
Food/ restaurant variety/ dining options	5.1%	4.9%	5.8%	5.1%	3.1%	10.2%	7.7%	7.5%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	3.6%	3.6%	0.0%	2.9%	0.0%	0.0%	3.6%	2.5%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	2.4%	3.2%	6.7%	3.1%	6.2%	0.0%	10.9%	7.2%

LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

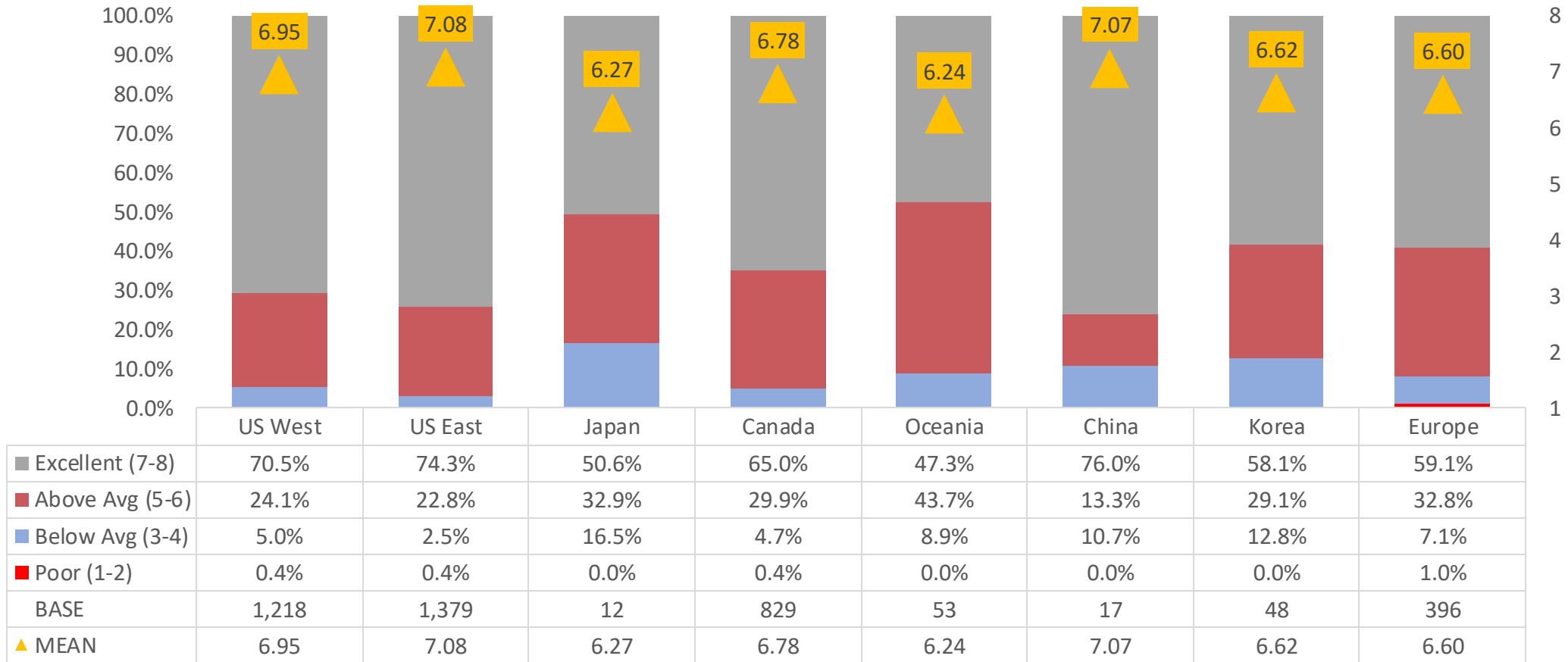
- **Gender:** Female visitors from **U.S. West** were more likely to return to Maui in the next five years compared to males.
- **Age:** Young adults under the age of 35 from **U.S. West** were the least likely to return to Maui in the next five years than older travelers from this visitor market.
- **Islands visited:** Visitors from **U.S. East** who stayed exclusively on Maui expressed a greater likelihood of returning compared to those who also visited other islands during their trip.
- **Travel party size:** The likelihood of return was highest among **U.S. West** and **U.S. East** visitors who traveled to Maui alone.
- **Education:** Visitors from **U.S. West** without a college degree were more likely to return to Maui in the next five years than travelers from this visitor market with a college degree.

REASONS FOR NOT RETURNING - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Want to go someplace new	43.5%	48.0%	33.3%	42.4%	45.4%	50.0%	29.2%	36.8%
Too expensive/cost	33.3%	48.3%	0.0%	53.4%	30.1%	50.0%	47.2%	53.9%
Flight too long	8.0%	30.1%	33.3%	21.3%	5.6%	0.0%	47.2%	57.9%
Not enough value for the price	18.1%	13.6%	66.7%	13.5%	22.5%	0.0%	29.2%	13.5%
No reason to return/ nothing new	13.0%	10.2%	0.0%	11.4%	35.8%	0.0%	0.0%	6.2%
Other financial obligations	5.1%	8.9%	66.7%	13.1%	0.0%	0.0%	0.0%	8.8%
Unfriendly people/ felt unwelcome	8.7%	5.4%	0.0%	4.3%	11.3%	0.0%	0.0%	5.5%
Poor health/ age restriction	3.6%	6.1%	33.3%	4.5%	11.3%	0.0%	0.0%	2.0%
Too crowded/ congested/ traffic	6.5%	3.0%	0.0%	2.9%	13.2%	0.0%	0.0%	2.7%
Too commercial/ overdeveloped	5.1%	3.4%	0.0%	2.1%	11.3%	0.0%	0.0%	5.4%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	1.4%	4.8%	0.0%	2.4%	5.6%	0.0%	0.0%	4.0%
Nothing to do/ boring	3.6%	1.7%	0.0%	0.0%	11.3%	0.0%	29.2%	1.3%

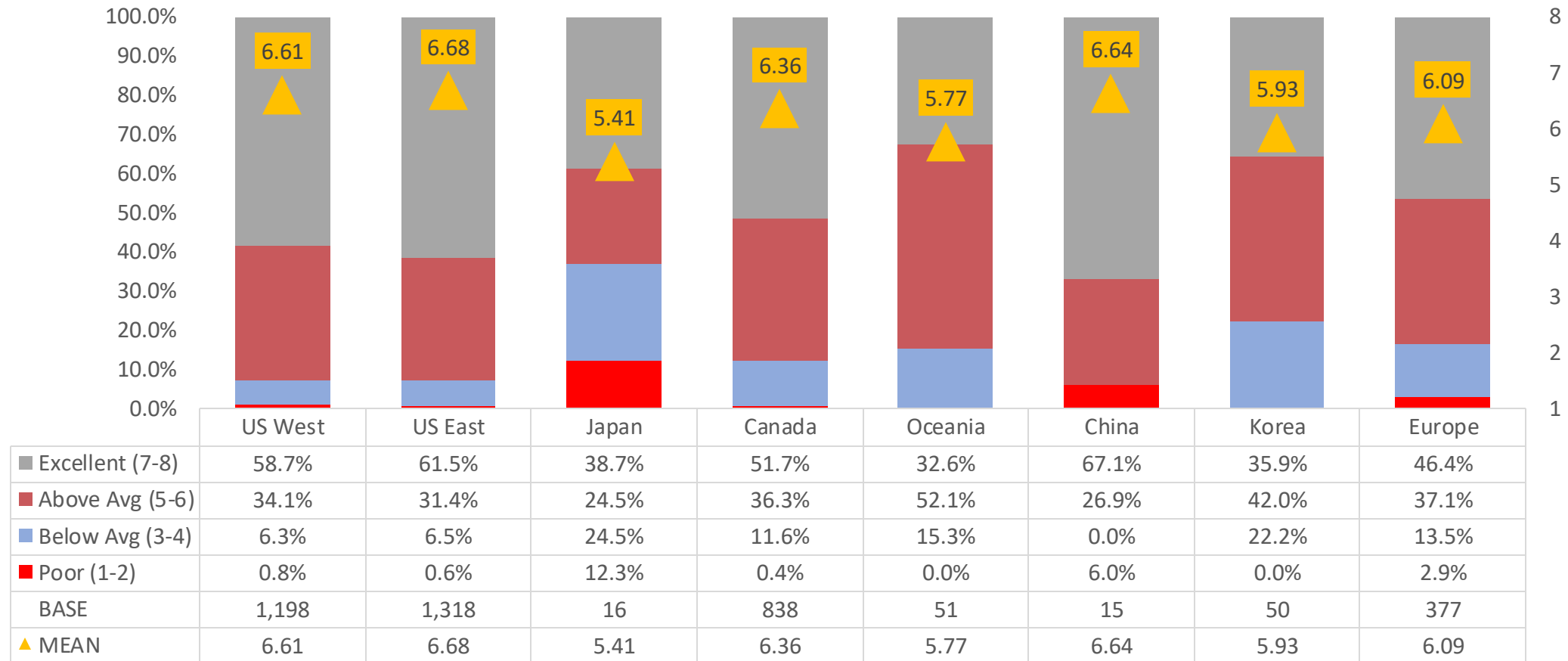
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



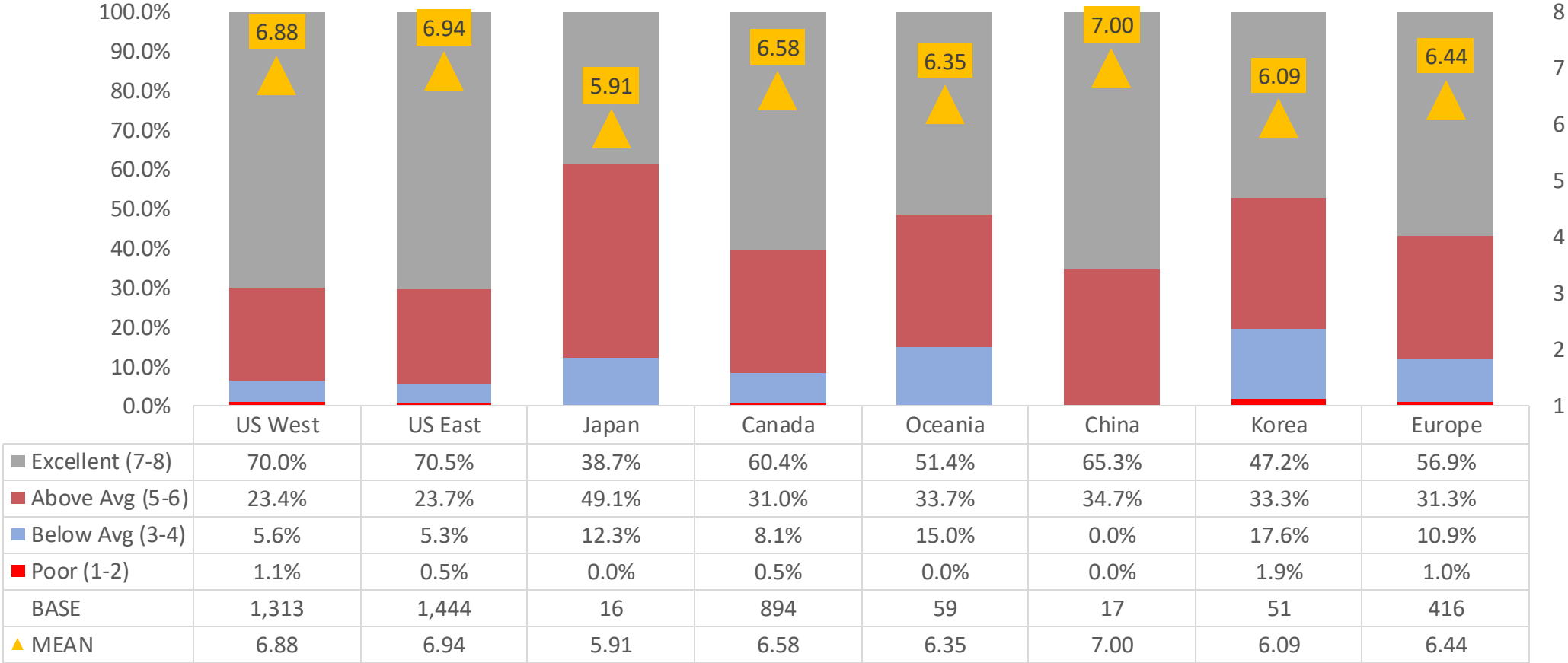
SHOPPING - MAUI

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



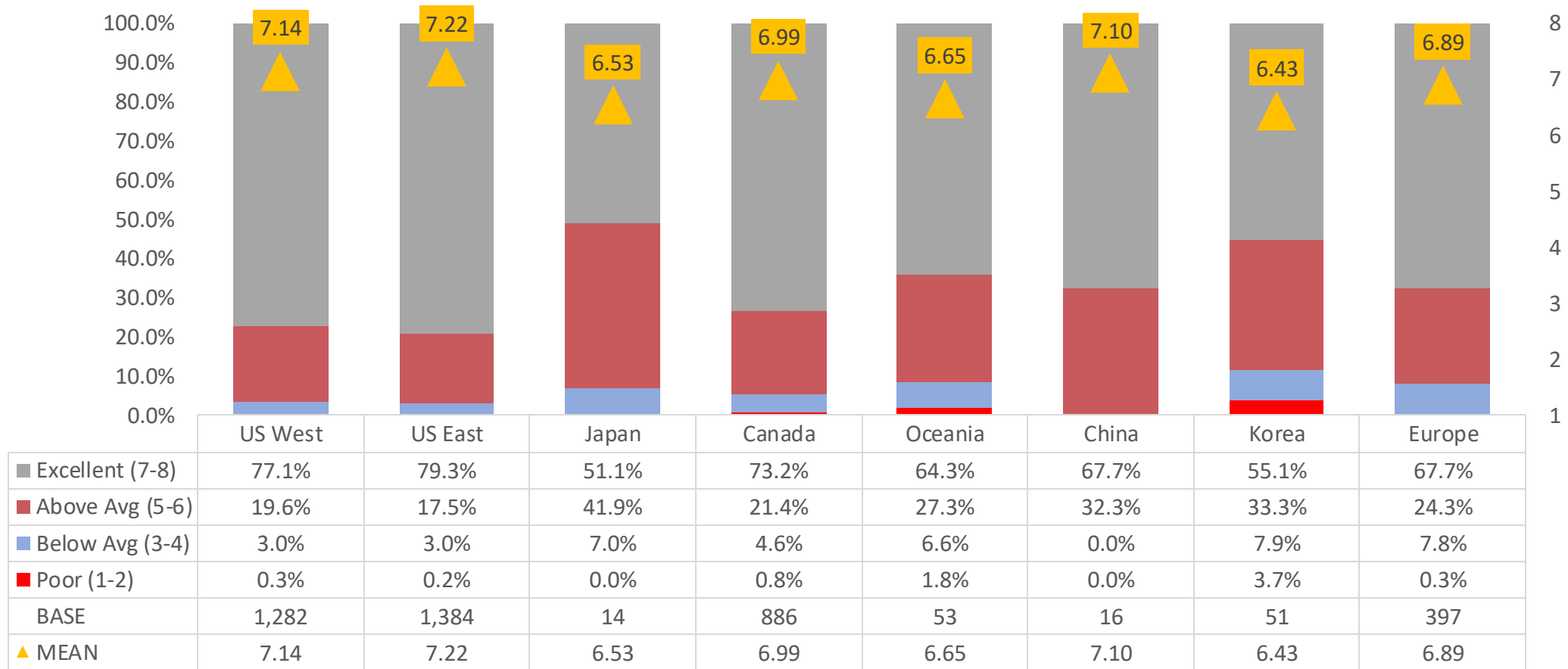
DINING/ FOOD & BEVERAGE - MAUI

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



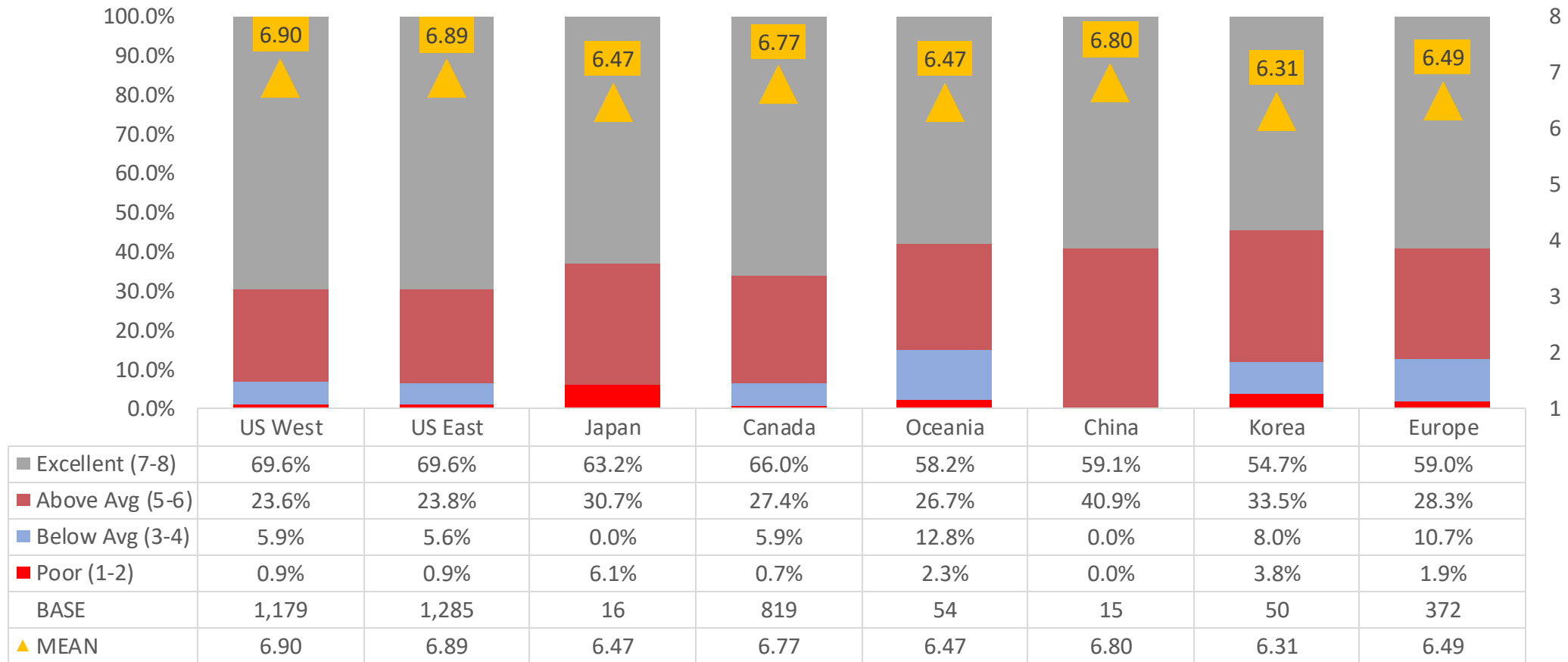
LODGING/ ACCOMMODATIONS - MAUI

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



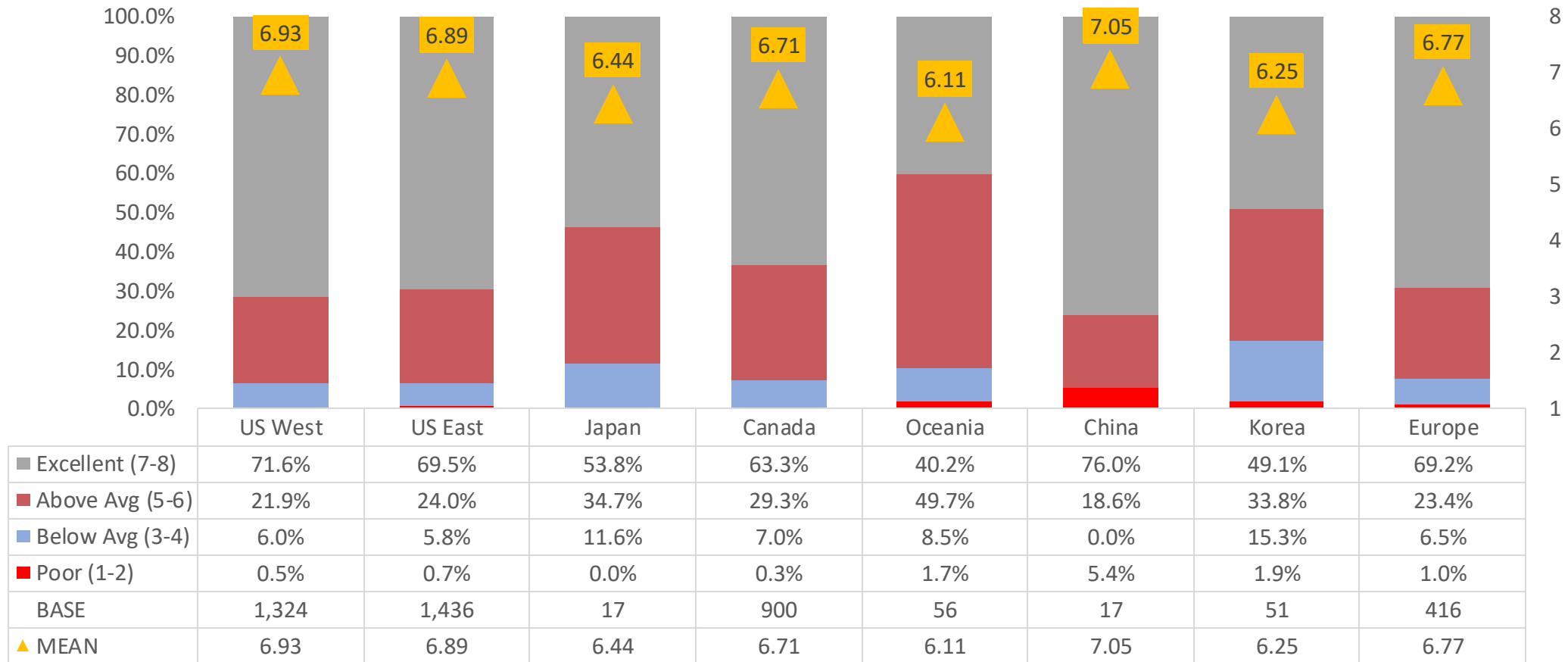
TRANSPORTATION ON ISLAND - MAUI

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



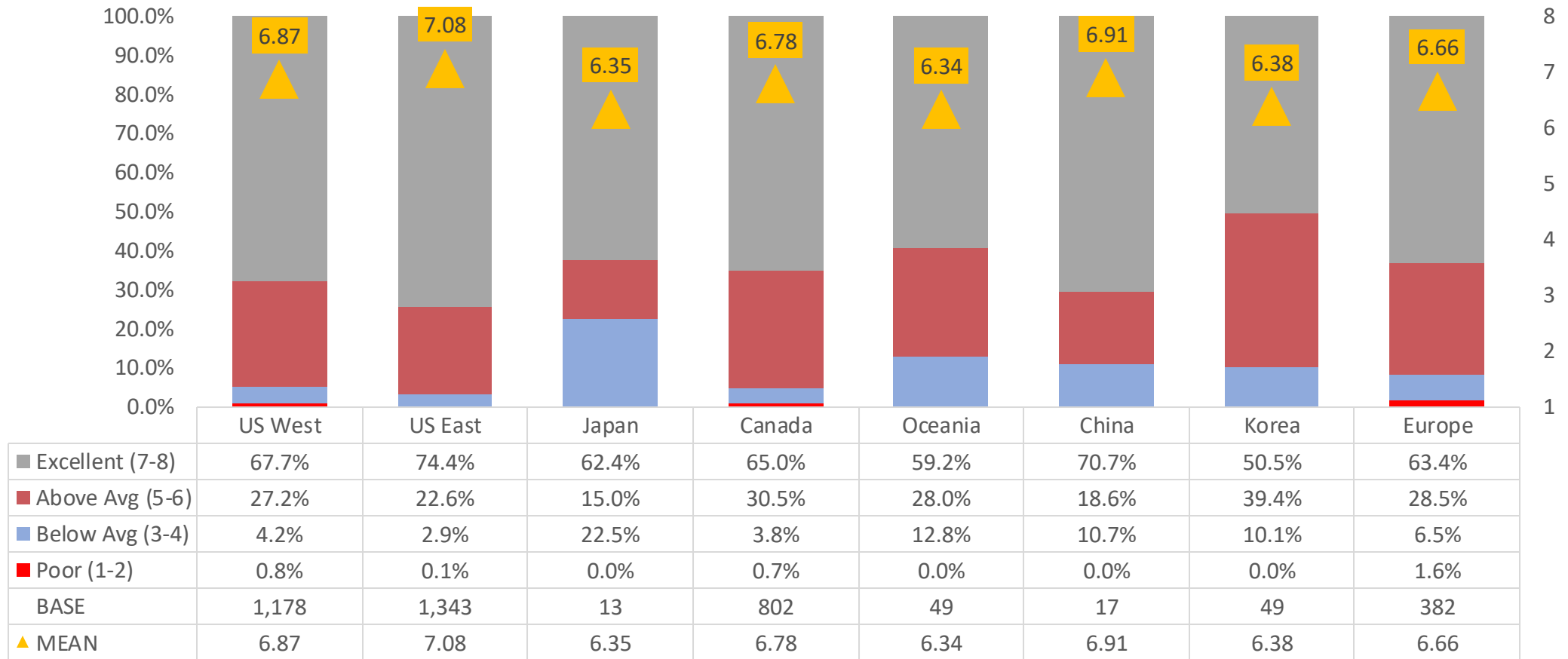
AIRPORT - MAUI

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



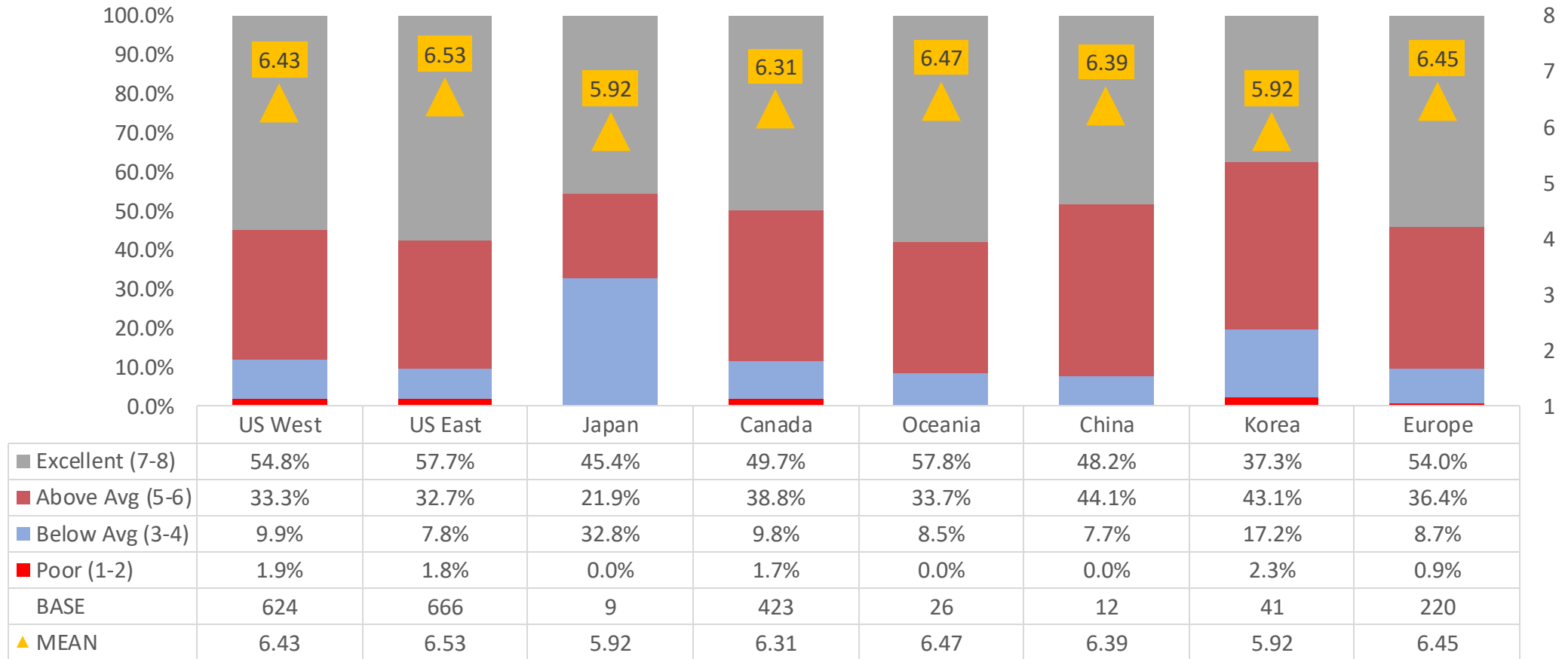
CULTURAL EXPERIENCES - MAUI

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



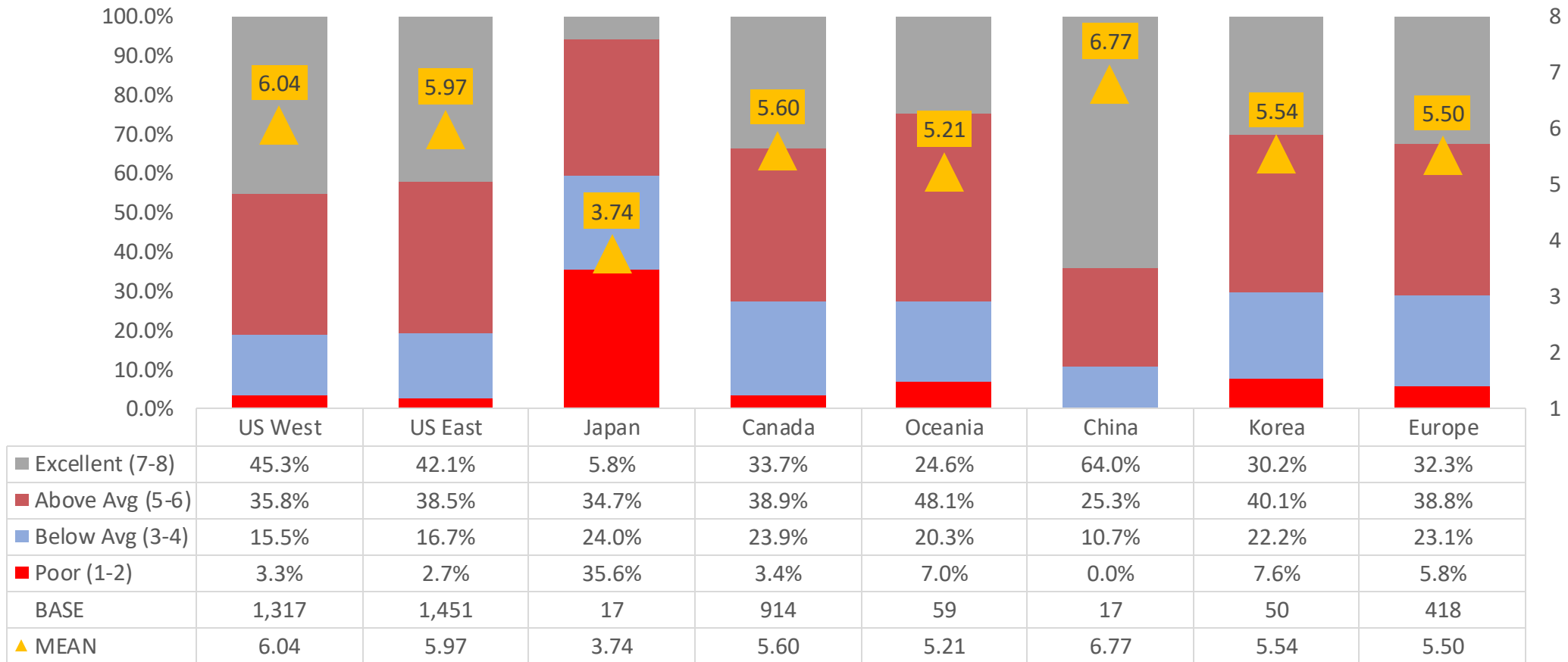
VOLUNTEER EXPERIENCES - MAUI

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



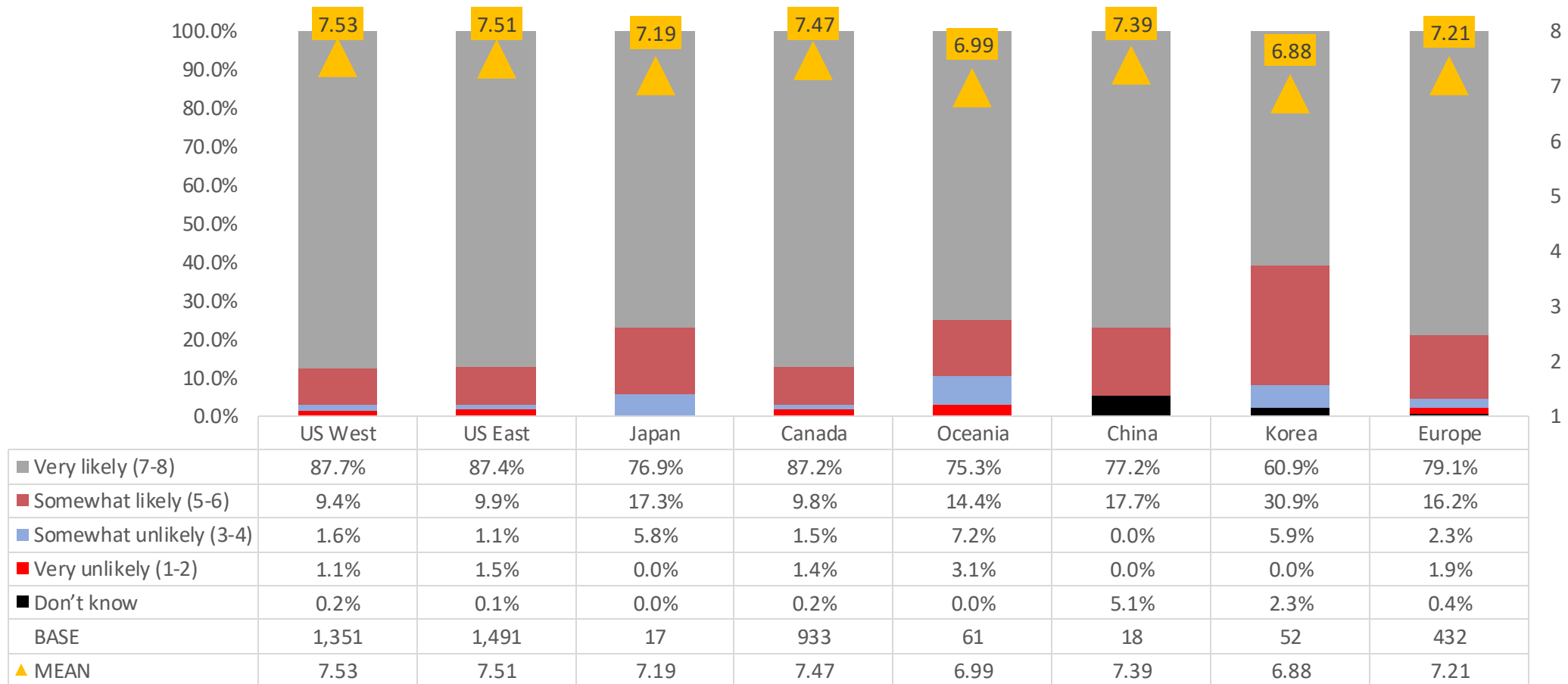
VALUE FOR THE MONEY - MAUI

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



BRAND/ DESTINATION ADVOCACY - MAUI

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



BRAND/ DESTINATION ADVOCACY - MAUI

- **Age:** Visitors from **U.S. West** between the ages of 35-49 expressed the strongest brand advocacy tendencies compared to other age group from this visitor market.
- **Gender:** Female respondents from **U.S. West** and **U.S. East** were more likely to recommend Maui to others than male respondents from these visitor markets.

MAUI ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.9%	98.6%	100.0%	98.2%	95.2%	100.0%	100.0%	98.3%
On own (self-guided)/ driving around the island	87.3%	85.5%	94.2%	87.2%	66.9%	72.2%	79.1%	79.3%
Helicopter ride/ airplane tour	2.1%	4.2%	0.0%	3.2%	10.2%	10.2%	3.6%	7.2%
Boat tour/ submarine ride/ whale watching	30.6%	39.1%	24.0%	24.3%	15.5%	5.1%	22.7%	28.8%
Visiting towns/ communities	55.6%	55.1%	34.7%	59.8%	32.6%	24.0%	25.0%	42.7%
Private limousine/ van tour/ tour bus	3.9%	11.7%	0.0%	6.2%	13.9%	5.1%	6.3%	8.0%
Scenic views/ natural landmarks	56.7%	65.3%	18.2%	62.3%	39.6%	83.5%	50.0%	61.3%
Movie and TV filming location tours	0.5%	1.2%	0.0%	0.9%	0.0%	0.0%	7.3%	1.4%

MAUI ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.9%	96.8%	94.2%	98.6%	86.6%	100.0%	94.5%	96.4%
Beach/ sunbathing	88.0%	86.3%	76.0%	91.1%	66.8%	73.4%	77.3%	84.9%
Bodyboarding	11.2%	6.6%	5.8%	13.9%	2.2%	0.0%	0.0%	7.2%
Stand-up paddle boarding	3.4%	2.6%	0.0%	3.3%	1.6%	0.0%	0.0%	2.8%
Surfing	4.5%	6.2%	5.8%	6.7%	6.4%	11.4%	8.2%	9.3%
Canoe paddling	1.0%	1.3%	5.8%	1.8%	0.0%	0.0%	2.3%	1.7%
Kayaking	2.3%	2.8%	0.0%	2.1%	2.2%	0.0%	0.0%	2.2%
Swimming in the ocean	68.1%	64.4%	28.9%	73.3%	59.8%	40.4%	40.0%	71.4%
Snorkeling	51.1%	44.9%	17.3%	49.9%	24.6%	21.5%	35.9%	46.7%
Freediving	2.1%	1.5%	0.0%	1.6%	1.6%	0.0%	1.8%	2.2%
Windsurfing/ kitesurfing	0.5%	0.1%	0.0%	1.0%	3.2%	5.1%	0.0%	2.1%
Jet skiing/ parasailing	2.1%	1.2%	0.0%	0.7%	0.0%	5.1%	0.0%	1.0%
Scuba diving	3.8%	3.0%	0.0%	2.5%	0.0%	0.0%	0.0%	3.2%
Fishing	1.5%	2.5%	0.0%	1.6%	1.6%	0.0%	0.0%	0.7%
Golf	9.5%	9.0%	5.8%	10.6%	6.4%	5.1%	7.7%	3.6%

MAUI ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.9%	96.8%	94.2%	98.6%	86.6%	100.0%	94.5%	96.4%
Running/ jogging/ fitness walking	36.5%	32.8%	12.4%	39.1%	26.7%	22.8%	15.5%	19.9%
Cycling	1.5%	2.1%	0.0%	2.8%	3.2%	0.0%	0.0%	2.4%
Spa	10.8%	9.2%	0.0%	5.2%	10.7%	5.1%	4.1%	7.0%
Hiking	39.3%	45.2%	24.0%	42.1%	12.3%	60.8%	19.1%	43.9%
Backpacking/ camping	1.0%	1.8%	0.0%	1.7%	0.0%	5.1%	1.8%	2.4%
Agritourism	9.5%	10.8%	11.6%	7.9%	2.2%	5.1%	7.7%	4.6%
Sports event or tournament	0.7%	1.4%	0.0%	1.0%	1.6%	0.0%	1.8%	1.0%
Parks/ botanical gardens	31.3%	36.1%	24.0%	33.2%	17.7%	20.3%	11.4%	32.5%
Waterparks	1.7%	1.2%	0.0%	1.4%	2.2%	0.0%	4.1%	1.5%
Mountain tubing/ waterfall rappel	0.5%	0.8%	0.0%	0.5%	0.0%	15.2%	0.0%	4.1%
Zip-lining	5.2%	5.3%	5.8%	2.2%	2.2%	5.1%	2.3%	1.2%
Skydiving	0.0%	0.5%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	1.1%	2.4%	0.0%	0.5%	0.0%	0.0%	1.8%	1.9%
Horseback riding	0.7%	1.3%	0.0%	0.3%	0.0%	0.0%	0.0%	1.0%

MAUI ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	98.6%	97.8%	100.0%	98.5%	96.8%	94.9%	98.2%	97.5%
Lunch/ sunset/ dinner/ evening cruise	23.3%	28.2%	30.7%	18.9%	18.2%	39.2%	38.6%	27.2%
Live music/ stage show	26.2%	29.4%	23.1%	25.4%	8.6%	11.4%	9.5%	23.1%
Nightclub/ dancing/ bar/ karaoke	5.8%	3.8%	5.8%	4.4%	8.0%	0.0%	0.0%	3.8%
Fine dining	52.1%	54.6%	11.6%	42.0%	44.3%	21.5%	28.2%	27.0%
Family restaurant	61.2%	57.4%	24.0%	62.1%	45.4%	0.0%	18.1%	40.5%
Fast food	23.9%	24.5%	34.7%	35.7%	23.5%	44.3%	40.5%	31.0%
Food truck	49.5%	46.8%	17.3%	47.4%	26.7%	30.3%	45.9%	49.2%
Café/ coffee house	53.9%	48.5%	28.9%	54.9%	59.4%	35.4%	47.7%	50.4%
Ethnic dining	20.8%	24.8%	5.8%	16.8%	7.0%	21.5%	15.0%	10.1%
Farm-to-table cuisine	22.6%	24.2%	28.9%	14.6%	7.5%	5.1%	5.5%	9.5%
Prepared own meal	55.8%	42.5%	40.4%	66.4%	38.5%	17.7%	17.7%	44.3%

MAUI ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.9%	96.0%	94.2%	96.9%	91.4%	89.8%	94.5%	95.6%
Malls/ department stores	44.6%	43.4%	36.4%	55.0%	49.2%	45.5%	60.0%	49.1%
Designer boutiques	17.7%	21.0%	11.6%	18.6%	7.5%	0.0%	0.0%	10.4%
Hotel/ resort stores	34.3%	38.5%	17.3%	29.1%	24.1%	25.2%	13.6%	23.7%
Swap meet/ flea market	18.9%	15.9%	5.8%	20.9%	5.9%	0.0%	0.0%	5.0%
Discount/ outlet stores	13.0%	11.1%	24.0%	15.2%	12.8%	0.0%	32.7%	9.0%
Supermarkets	67.9%	57.7%	52.9%	69.4%	50.2%	34.1%	44.5%	64.7%
Farmer's market	38.6%	29.5%	23.1%	39.7%	22.0%	5.1%	20.0%	30.6%
Convenience stores	51.2%	46.8%	5.8%	51.7%	38.0%	17.7%	30.9%	32.0%
Duty-free stores	3.6%	2.8%	5.8%	2.4%	6.4%	0.0%	9.5%	4.4%
Hawai'i-made products	47.7%	49.3%	28.9%	44.8%	24.1%	27.8%	21.3%	39.9%
Local shops and artisans	60.2%	60.8%	46.2%	58.2%	36.3%	21.5%	7.7%	48.9%
Local fashion designers	7.0%	8.2%	11.6%	9.6%	7.0%	5.1%	0.0%	9.5%

MAUI ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	59.1%	68.7%	71.1%	62.5%	58.3%	39.2%	60.9%	58.1%
Historic military sites and museums	3.9%	6.1%	18.2%	3.6%	3.8%	0.0%	16.8%	4.3%
Historic Hawaiian sites and museums	21.4%	27.3%	28.9%	24.4%	11.8%	10.2%	6.3%	26.6%
Other historical sites, museums, and homes	8.2%	11.4%	24.0%	9.2%	11.8%	6.3%	13.6%	10.3%
Art museum	2.0%	1.2%	0.0%	1.4%	0.0%	0.0%	2.3%	2.1%
Art galleries/ exhibitions	9.8%	9.8%	5.8%	10.5%	6.4%	0.0%	1.8%	5.2%
Lū'au/ Polynesian show/ hula show	19.3%	32.4%	17.3%	23.8%	14.5%	16.5%	18.1%	23.5%
Lesson- e.g. ukulele, hula, canoe, lei making	4.9%	5.1%	5.8%	5.3%	3.2%	0.0%	11.8%	6.9%
Play/ concert/ theatre	2.6%	1.8%	5.8%	2.6%	0.0%	0.0%	4.1%	2.4%
Art/ craft fair	16.0%	14.0%	5.8%	13.8%	15.0%	11.4%	3.6%	4.7%
Festival/ events	3.4%	2.9%	0.0%	4.4%	7.0%	0.0%	4.1%	3.1%

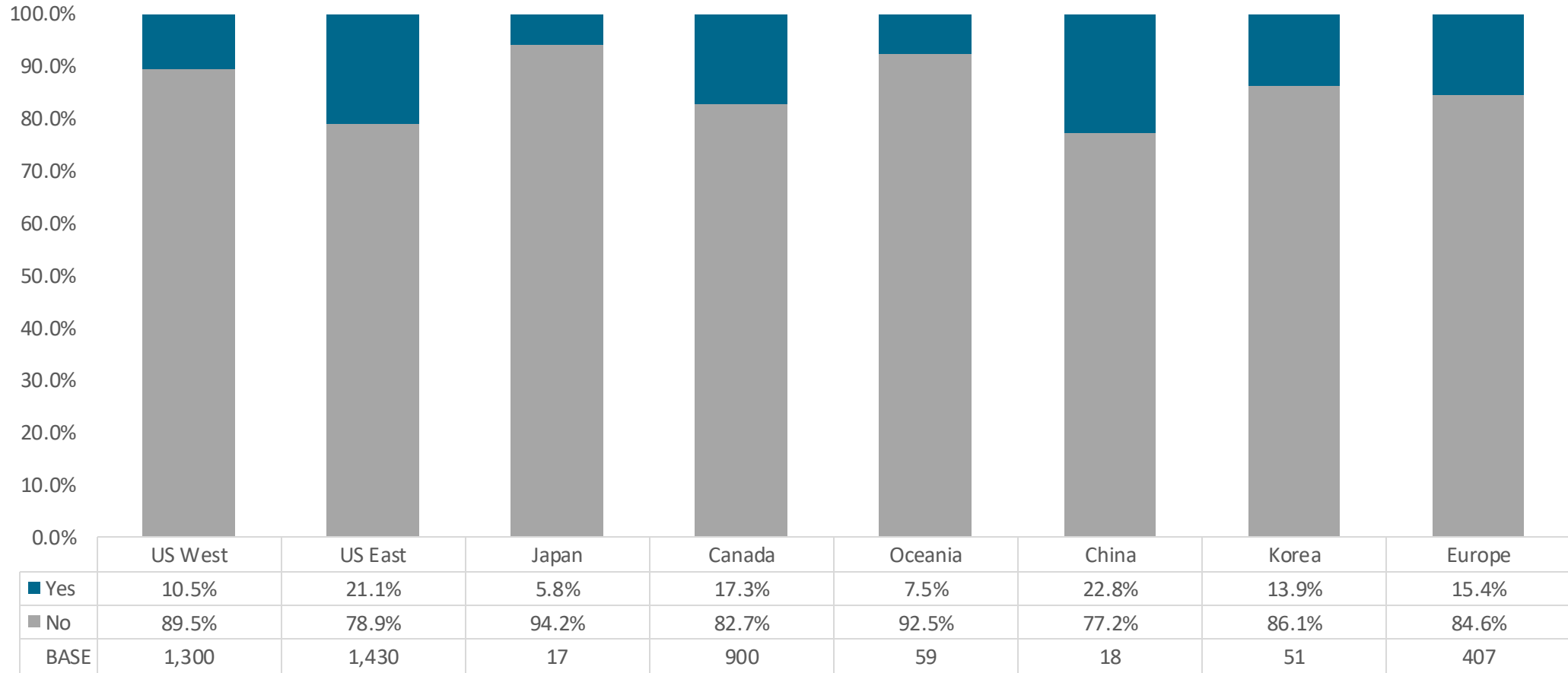
MAUI ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	93.6%	94.1%	94.2%	96.2%	89.3%	94.9%	94.5%	92.8%
Airport shuttle	7.4%	8.8%	24.0%	11.0%	8.6%	12.6%	3.6%	10.3%
Trolley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Public bus	1.6%	2.1%	23.1%	3.0%	4.8%	0.0%	7.3%	6.1%
Tour bus/ tour van	3.4%	10.9%	5.8%	5.6%	8.6%	6.3%	14.1%	8.0%
Taxi/ limo	3.3%	5.5%	0.0%	7.1%	9.6%	10.2%	14.1%	8.4%
Rental car	83.6%	79.4%	52.9%	81.4%	52.4%	72.2%	75.4%	72.4%
Ride share	11.7%	12.8%	0.0%	13.3%	24.1%	0.0%	9.5%	18.6%
Car share	3.2%	3.4%	5.8%	3.4%	1.6%	5.1%	1.8%	2.9%
Bicycle rental	1.4%	1.1%	5.8%	1.6%	0.0%	0.0%	0.0%	1.9%

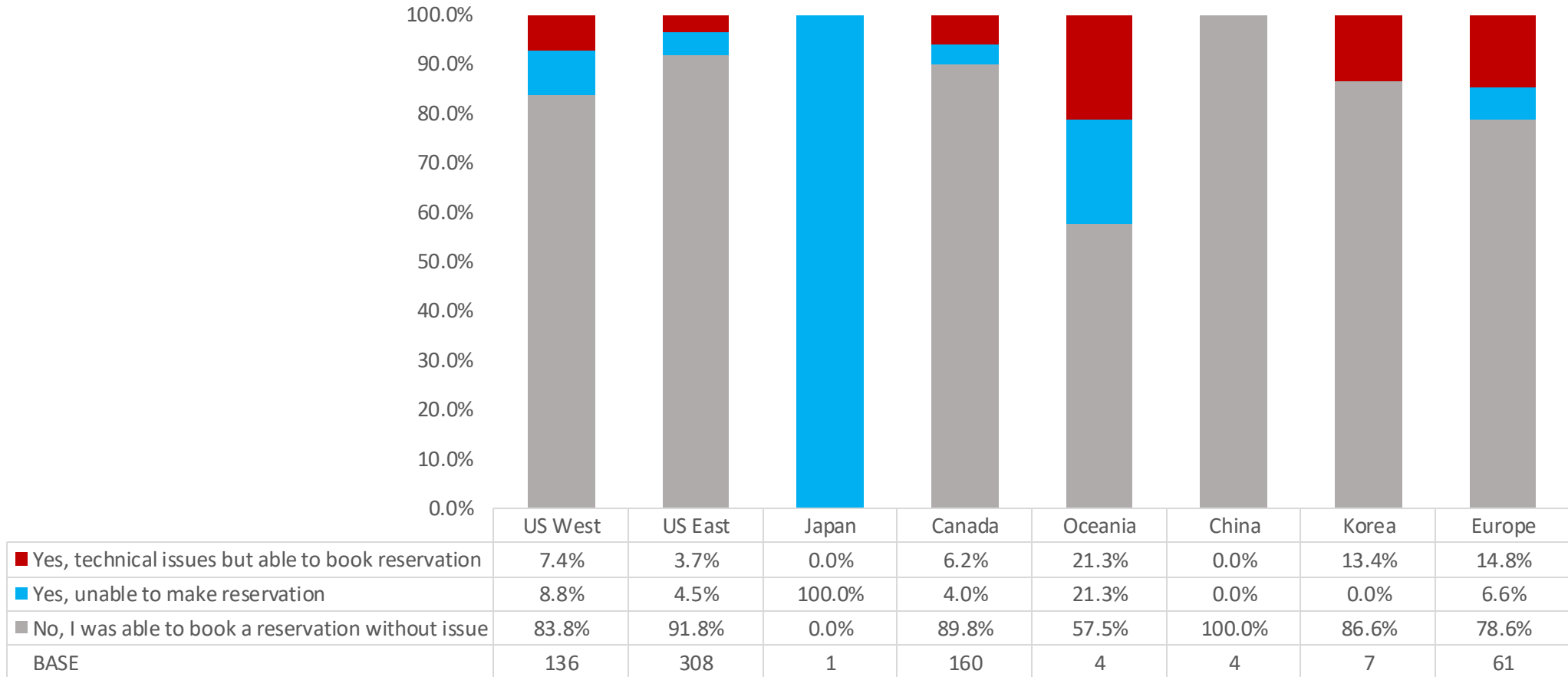
MAUI ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	27.9%	20.9%	70.2%	22.5%	13.4%	10.2%	26.4%	17.8%
Visiting friends/ relatives	24.9%	17.3%	64.4%	20.0%	13.4%	10.2%	26.4%	14.9%
Giving back to the local community	4.1%	4.4%	5.8%	3.1%	1.6%	0.0%	0.0%	3.1%

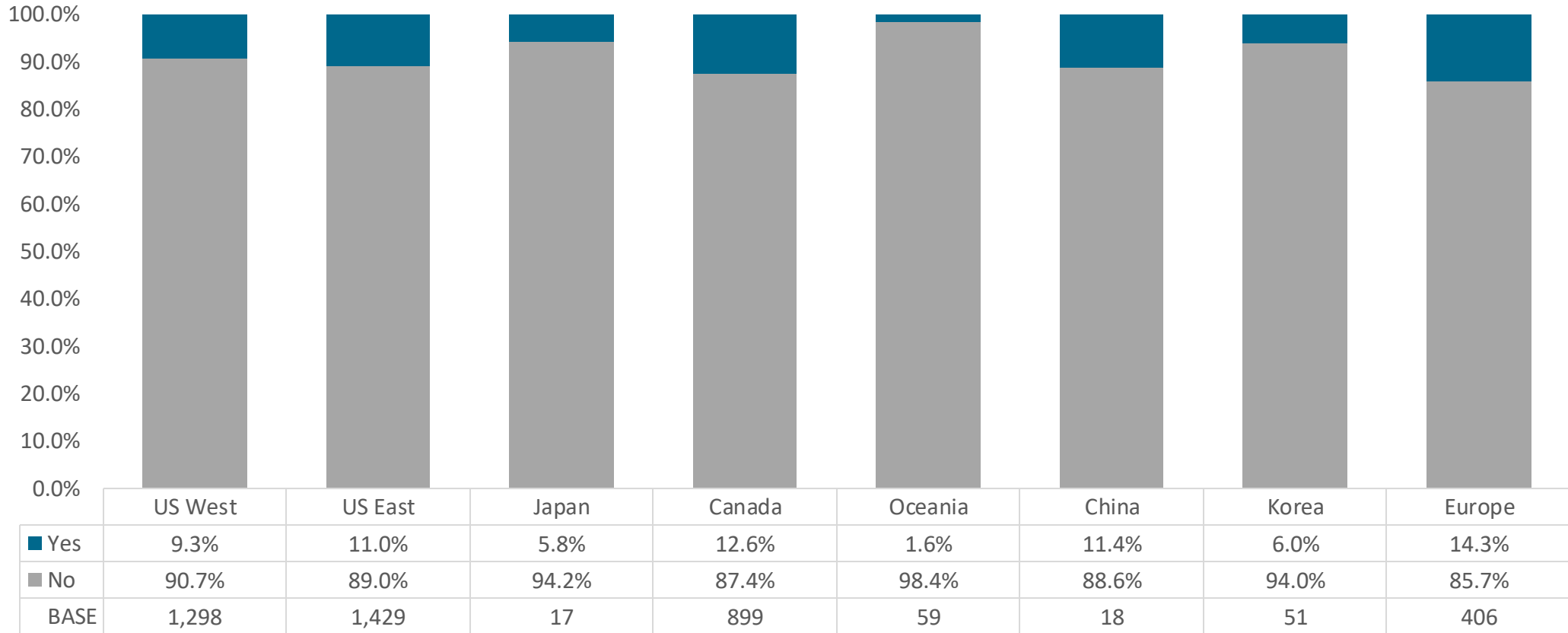
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



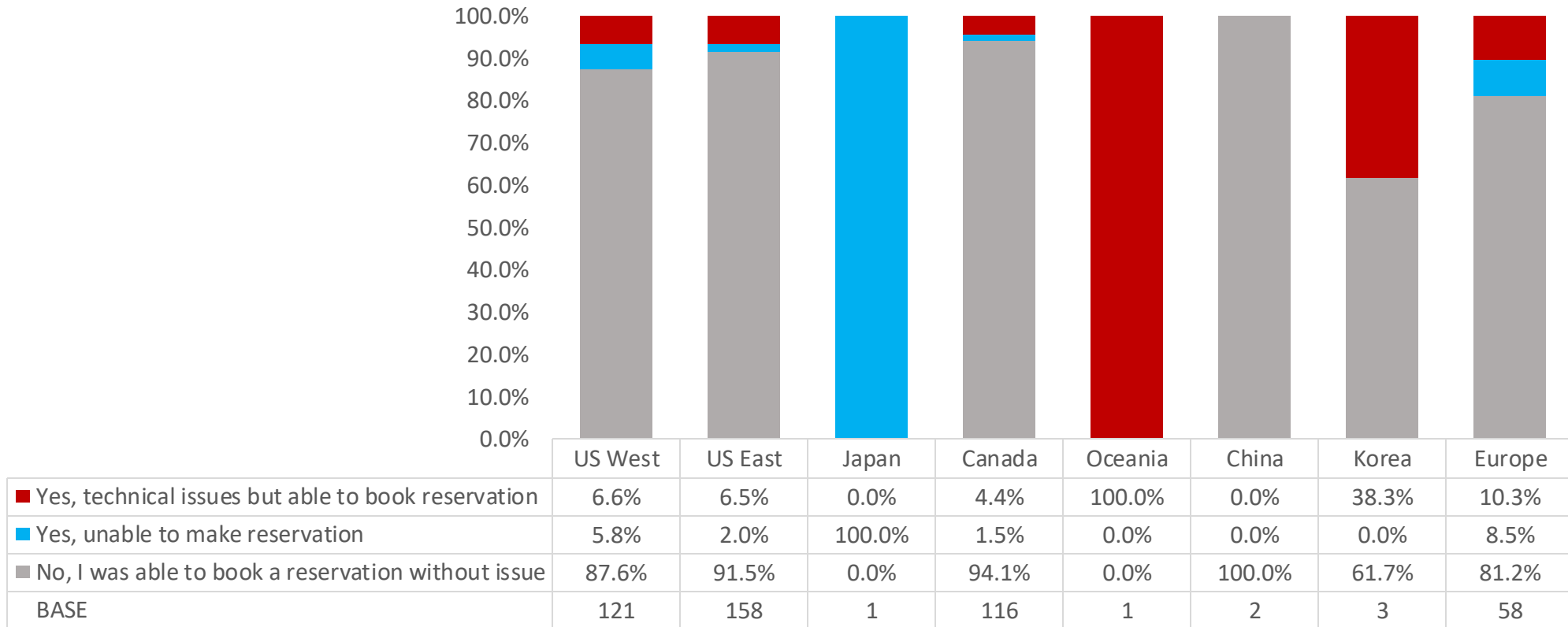
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



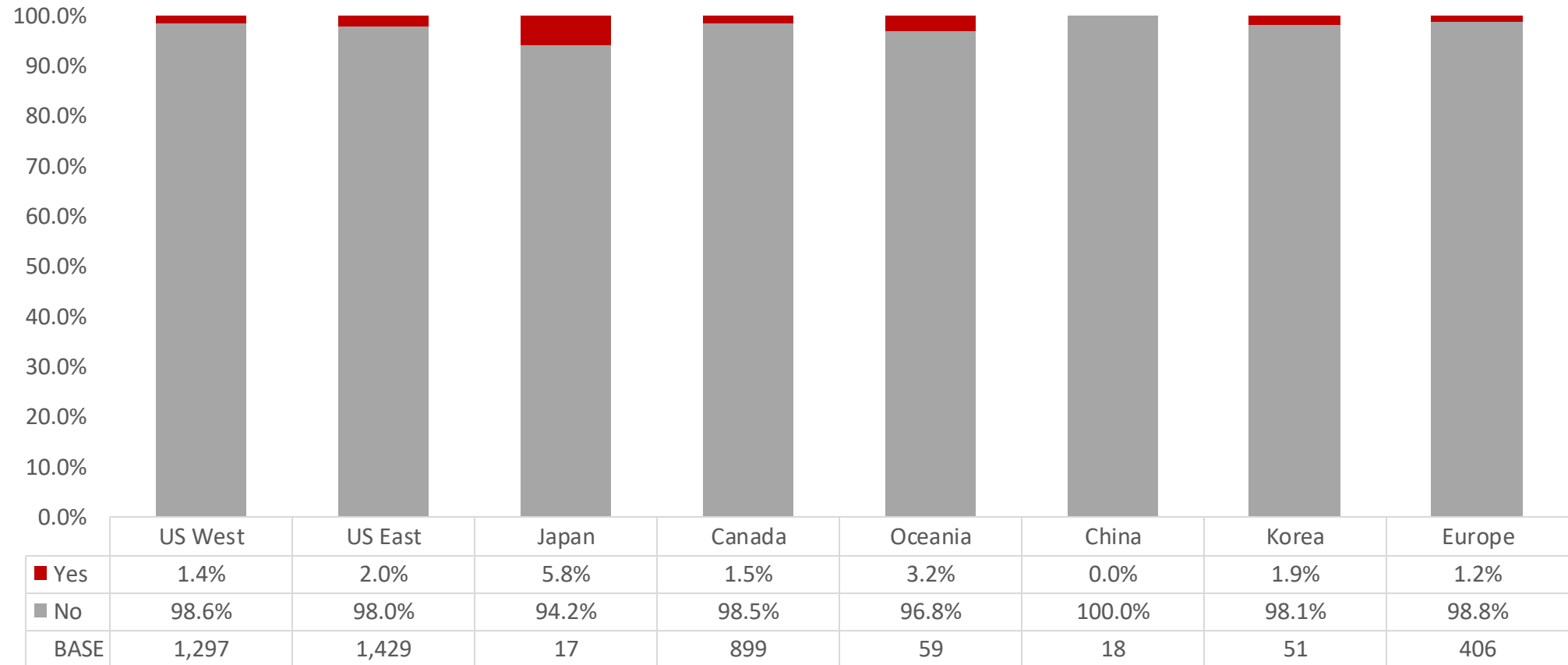
ʻĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



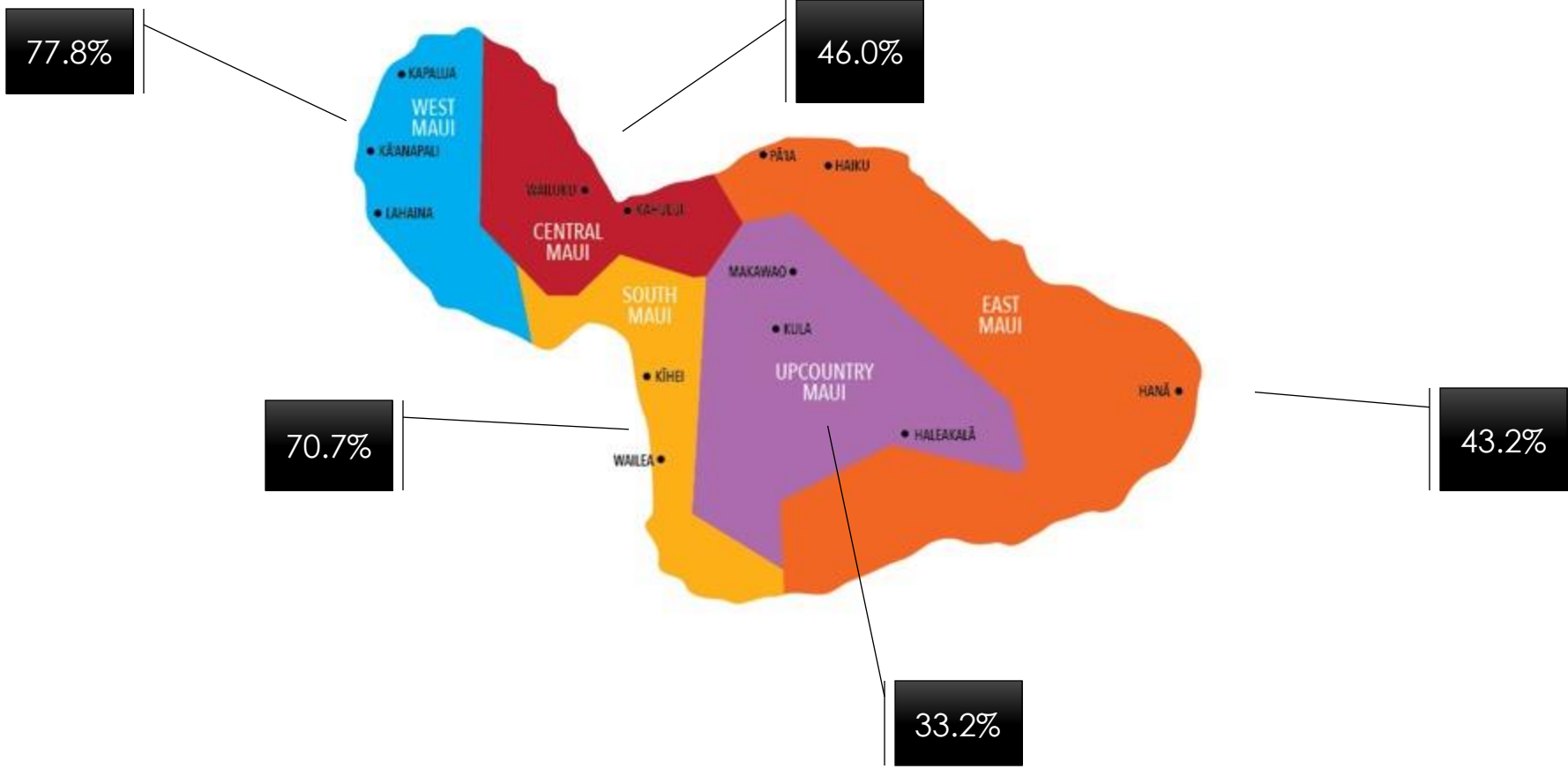
VISITED MAUI FOR SPECIFIC FESTIVAL OR SPORTING EVENT



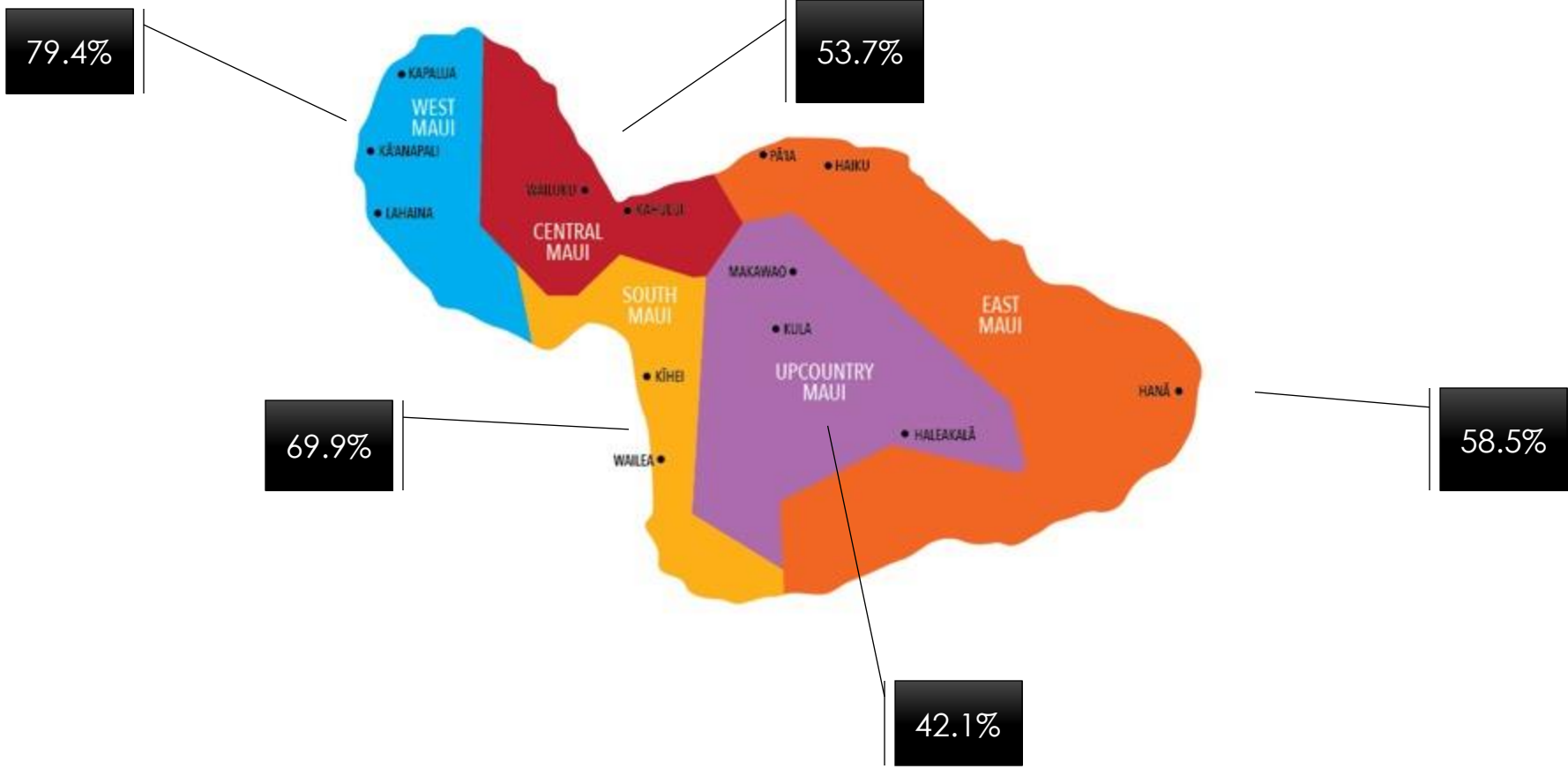
VISITED MAUI FOR SPECIFIC FESTIVAL OR SPORTING EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Maui Invitational	22.2%	44.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wedding/ honeymoon/ anniversary/ birthday/ funeral/ graduation	5.6%	7.2%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%
Sentry Tournament of Golf Champions	5.6%	10.4%	0.0%	24.1%	50.0%	0.0%	0.0%	0.0%
Hawaii Food and Wine Festival	5.6%	0.0%	0.0%	8.0%	0.0%	0.0%	100.0%	0.0%
Maui Marathon	5.6%	17.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other (please specify festival/event name)	5.6%	3.6%	0.0%	22.6%	0.0%	0.0%	0.0%	0.0%
Convention/ conference/ retreat/ seminar/ meeting/ workshop/ training/ work event	11.1%	0.0%	0.0%	14.6%	0.0%	0.0%	0.0%	39.0%
Whale watching	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other festival/ concert	27.8%	10.4%	100.0%	8.0%	0.0%	0.0%	0.0%	20.7%
Other sporting event	11.1%	3.6%	0.0%	16.0%	50.0%	0.0%	0.0%	40.2%
BASE	18	29	1	13	2	0	1	6

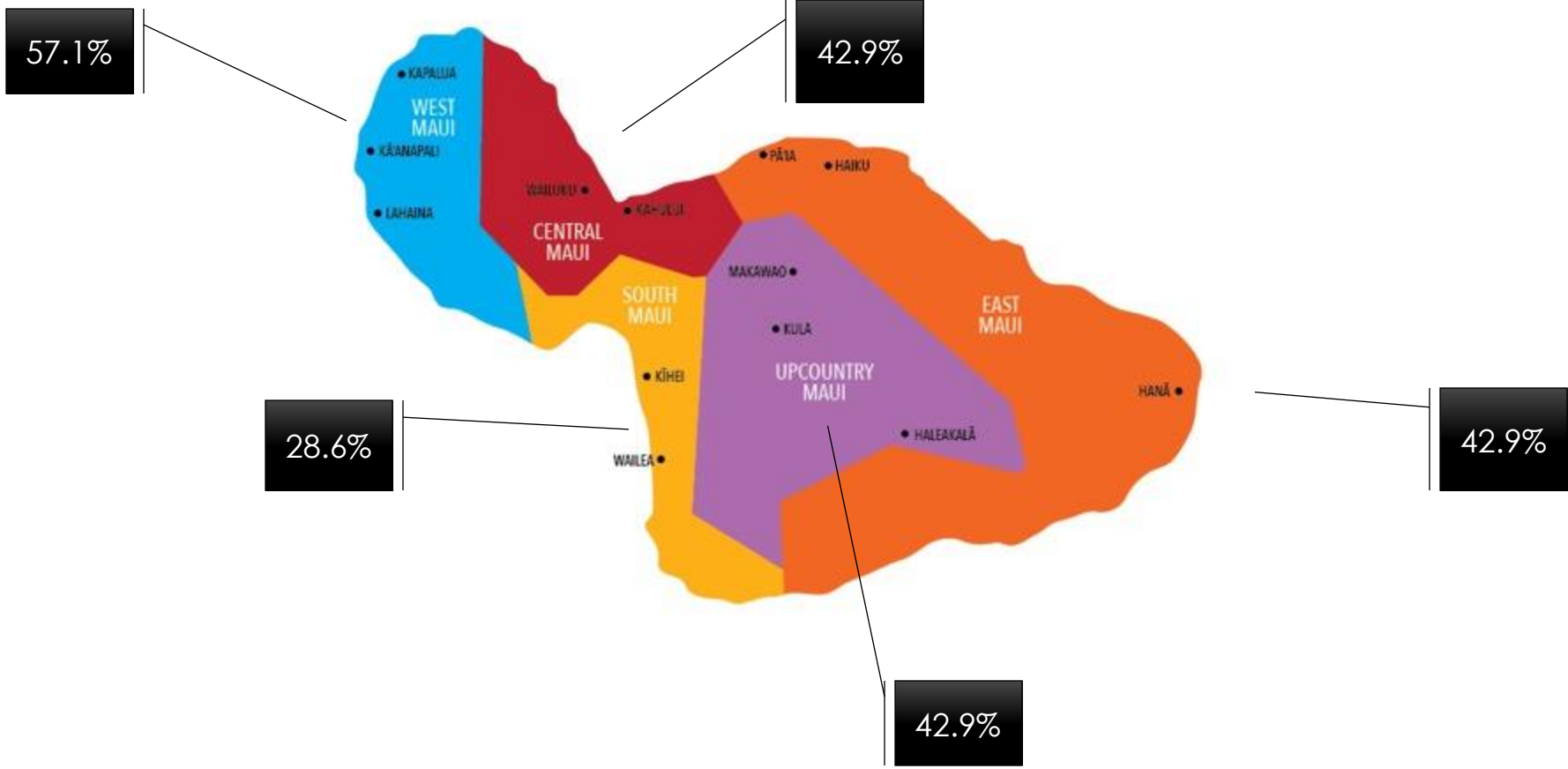
AREAS VISITED - MAUI U.S. WEST



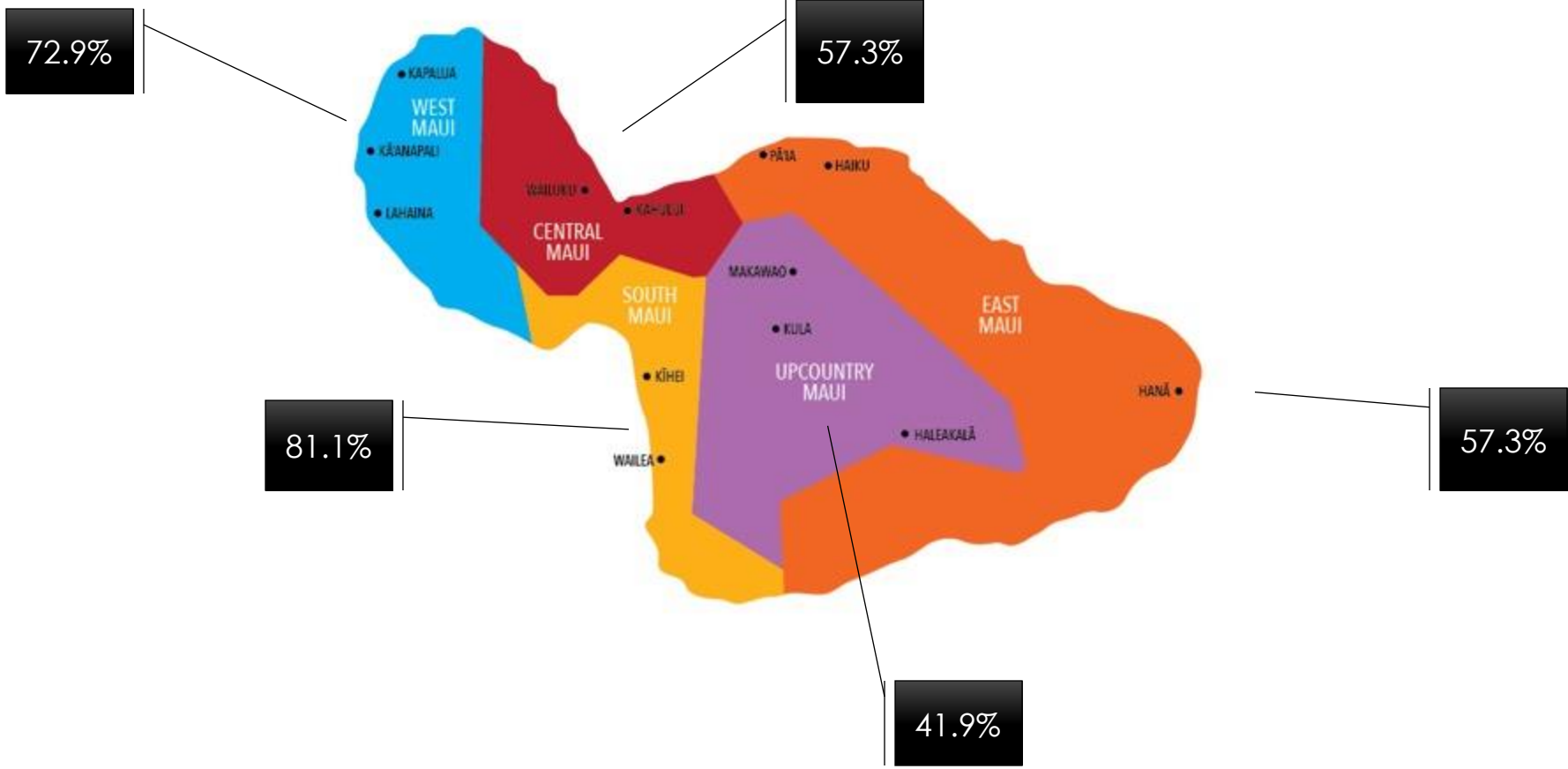
AREAS VISITED - MAUI U.S. EAST



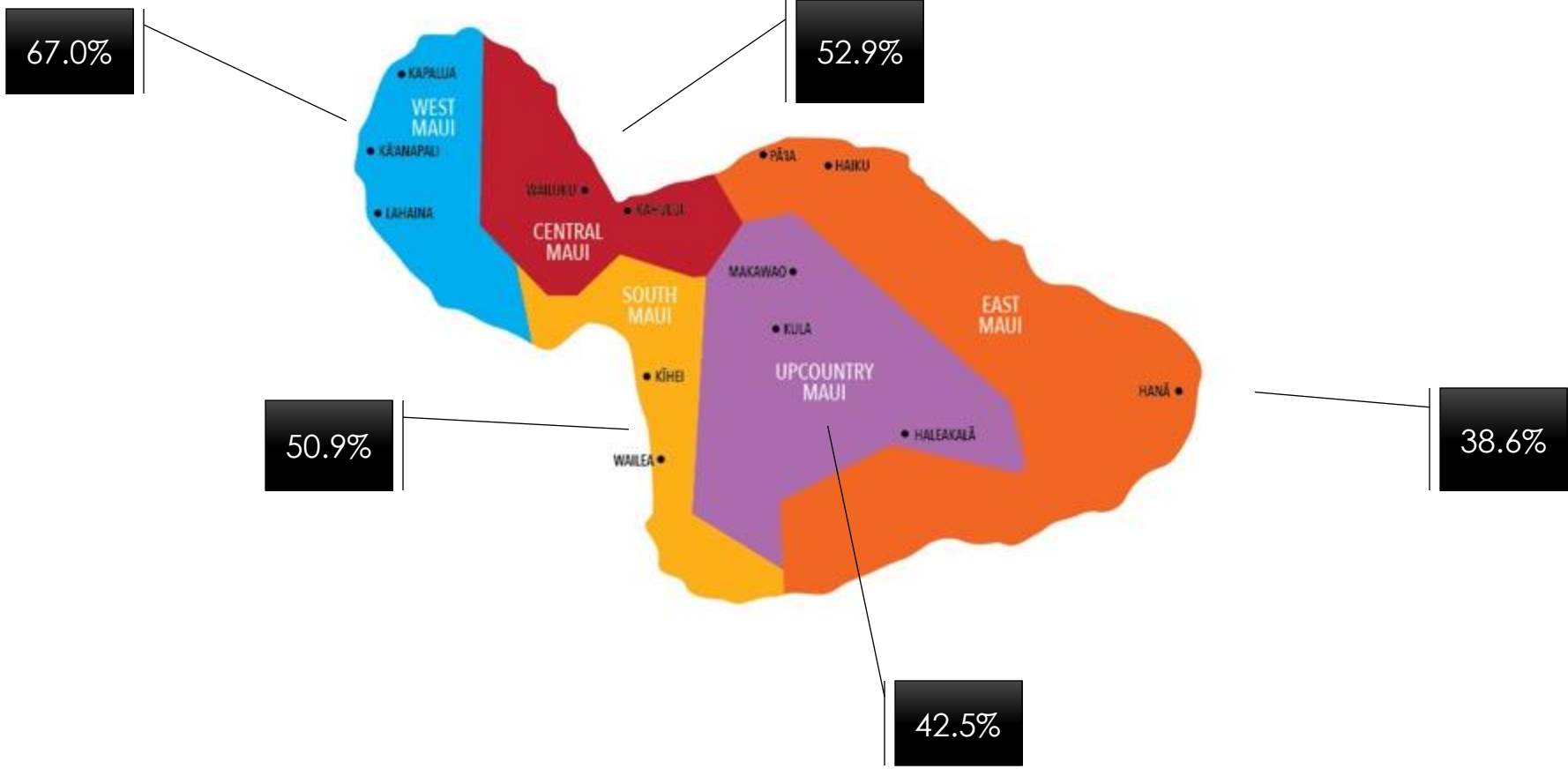
AREAS VISITED - MAUI JAPAN



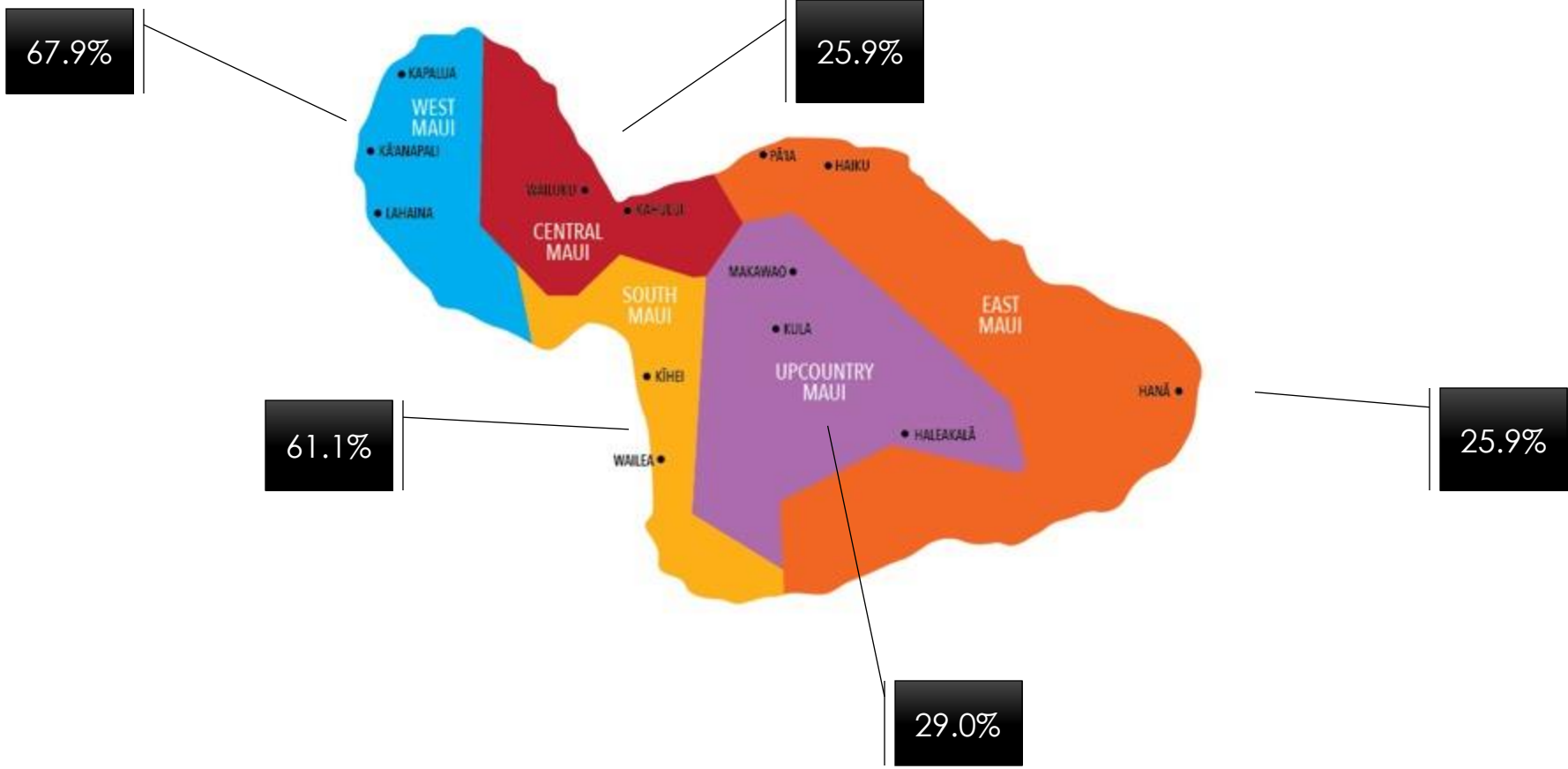
AREAS VISITED - MAUI CANADA



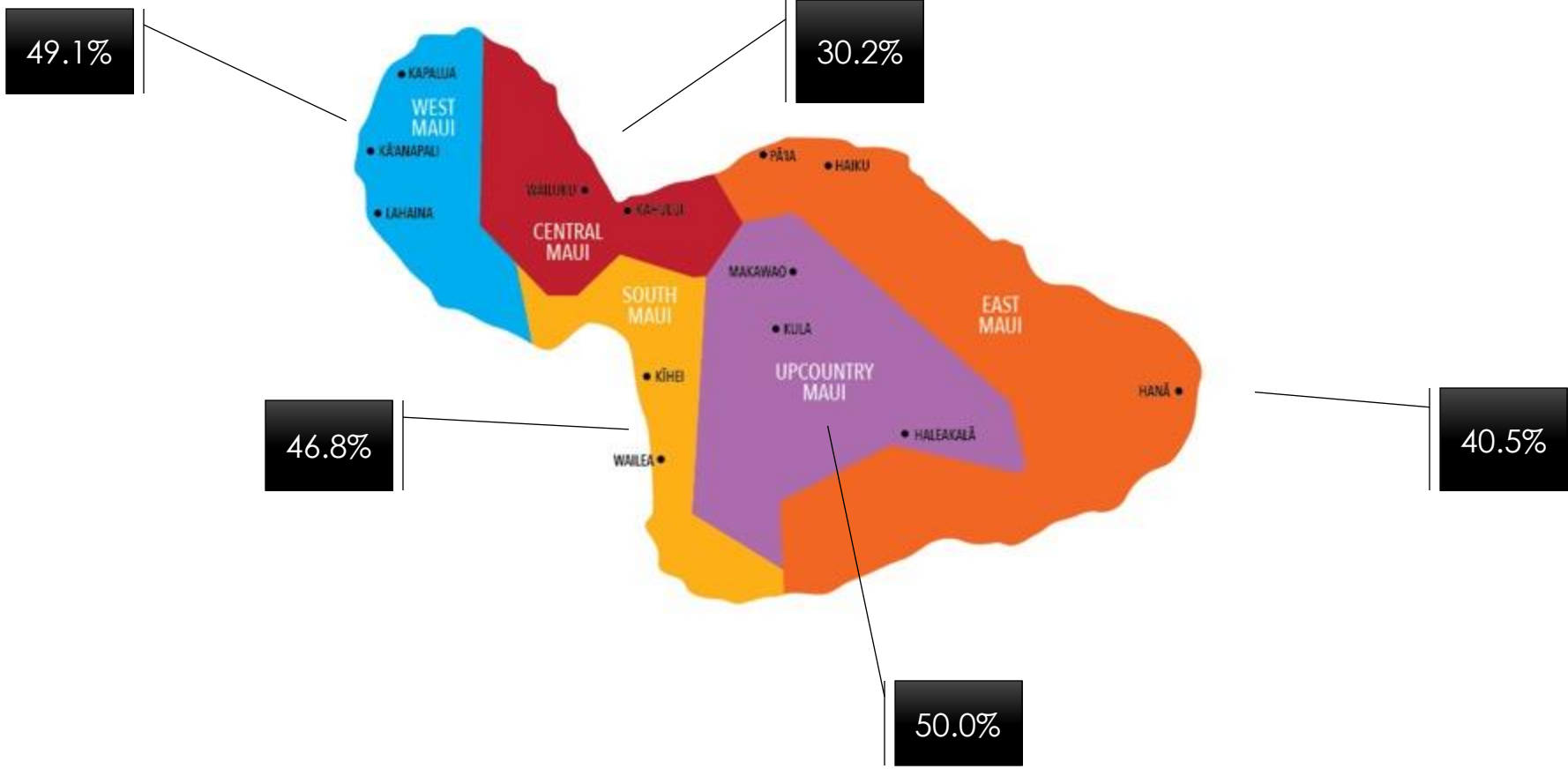
AREAS VISITED - MAUI OCEANIA



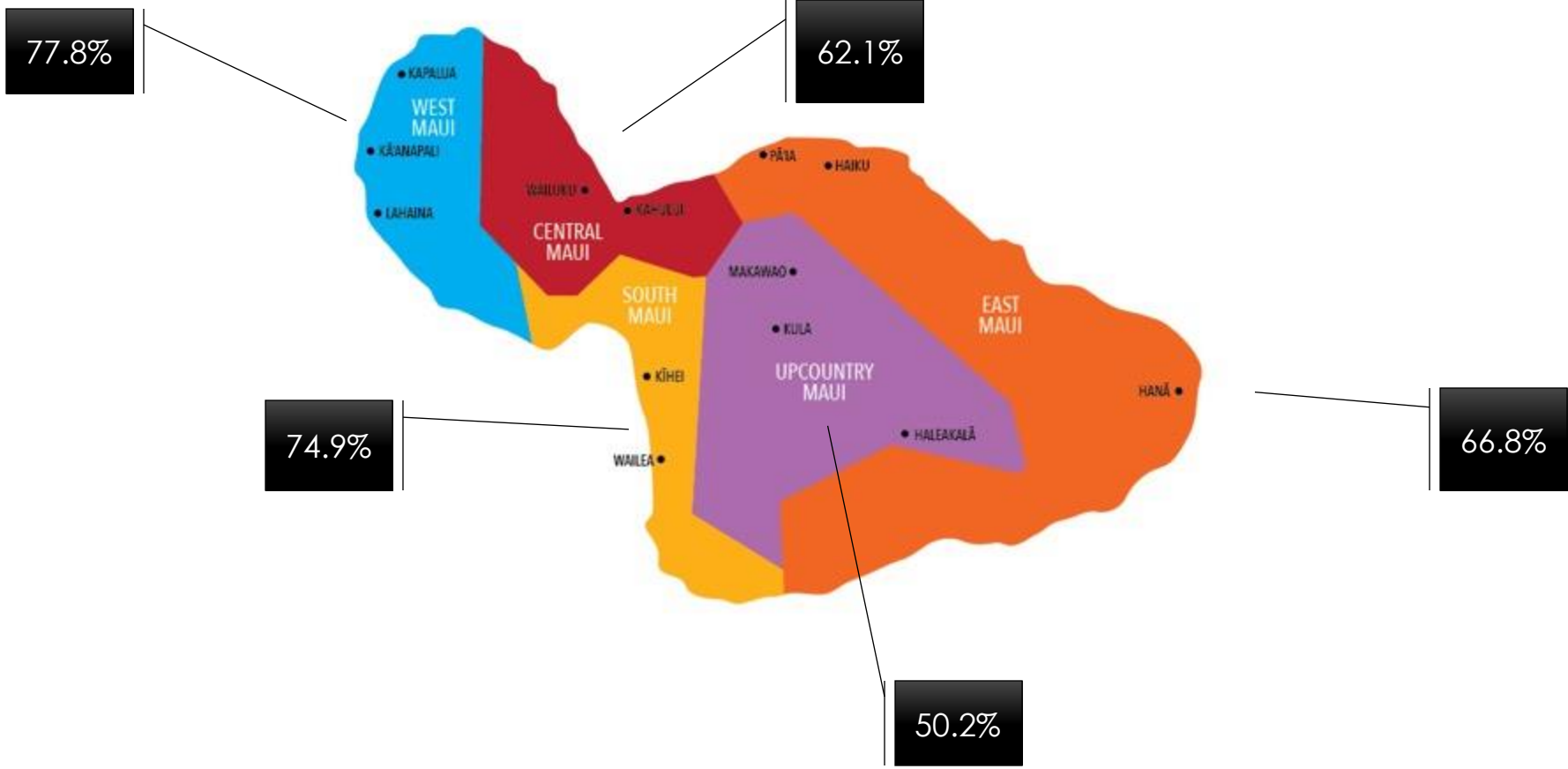
AREAS VISITED - MAUI CHINA



AREAS VISITED - MAUI KOREA

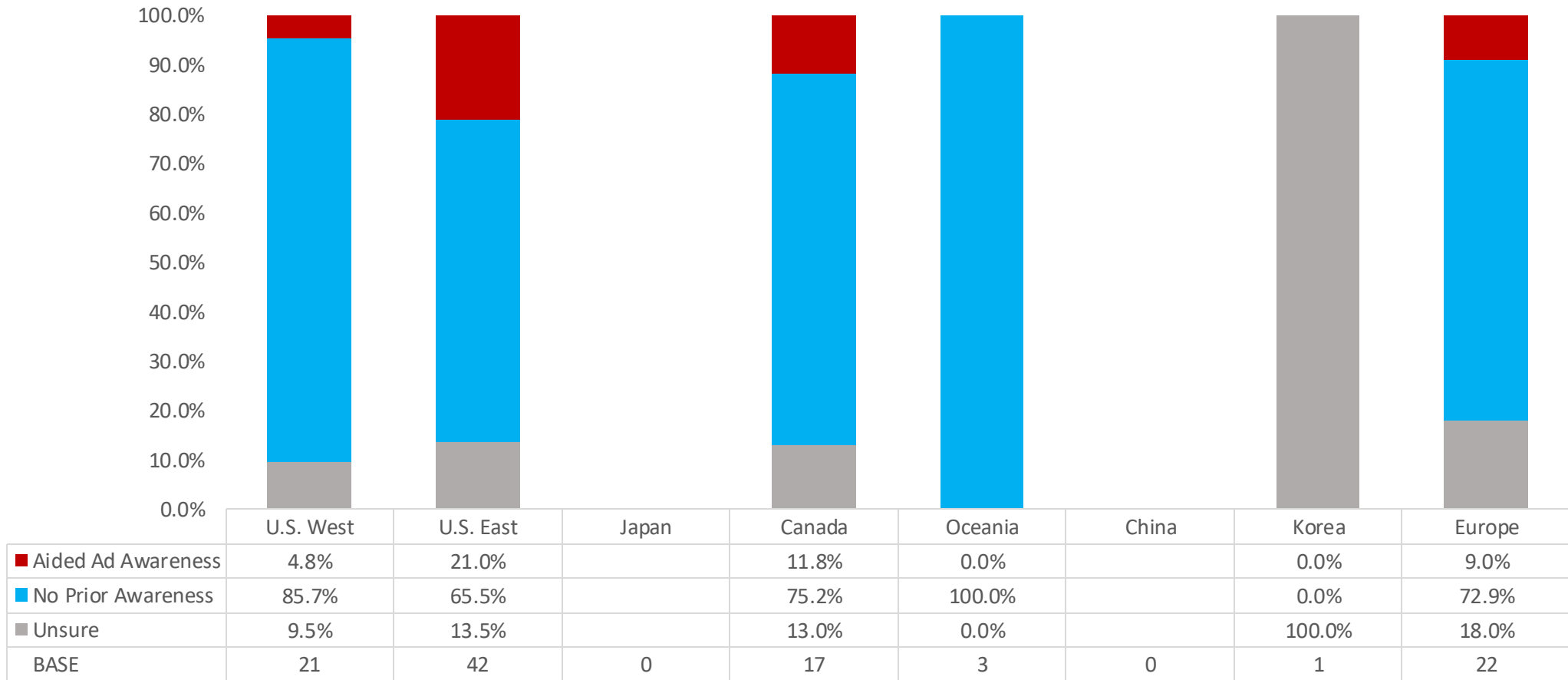


AREAS VISITED - MAUI EUROPE

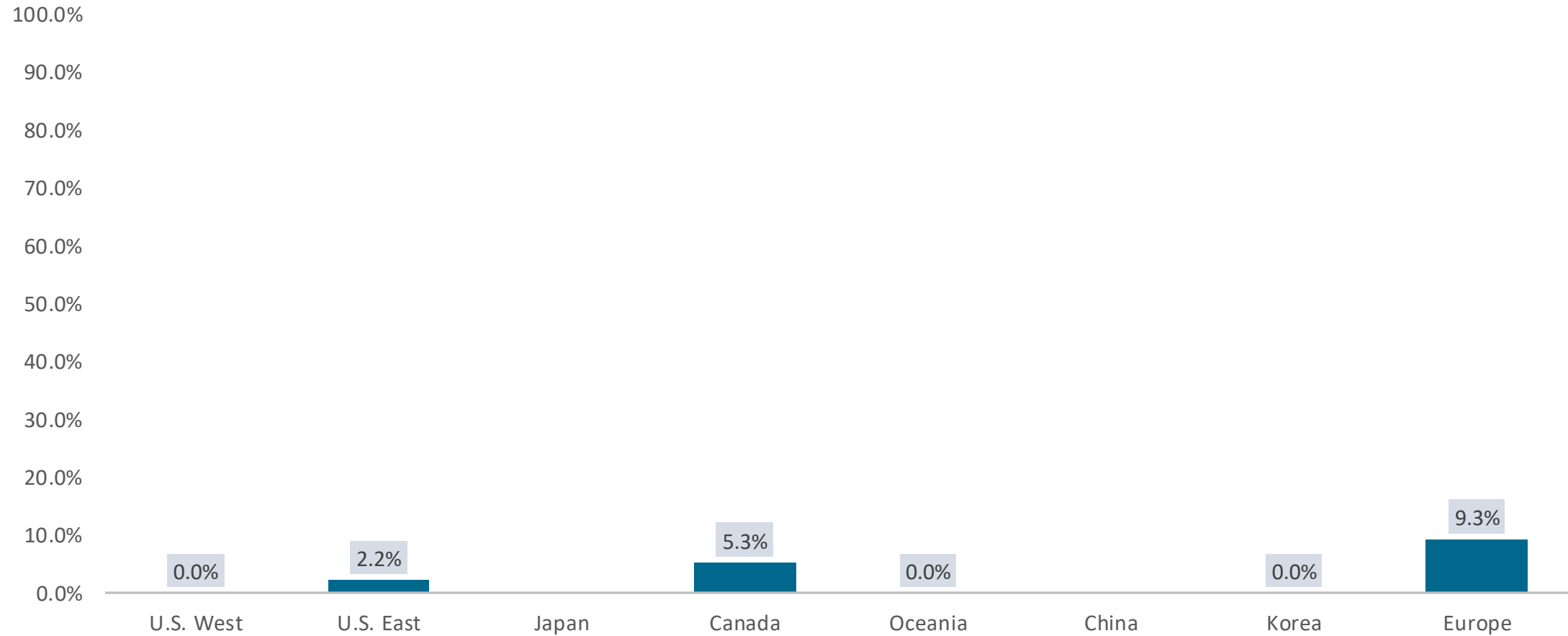


Section 24 – Molokaʻi

AIDED ADVERTISING AWARENESS - MOLOKA'I



IMPACT OF LOCATION FILMING - MOLOKA'I



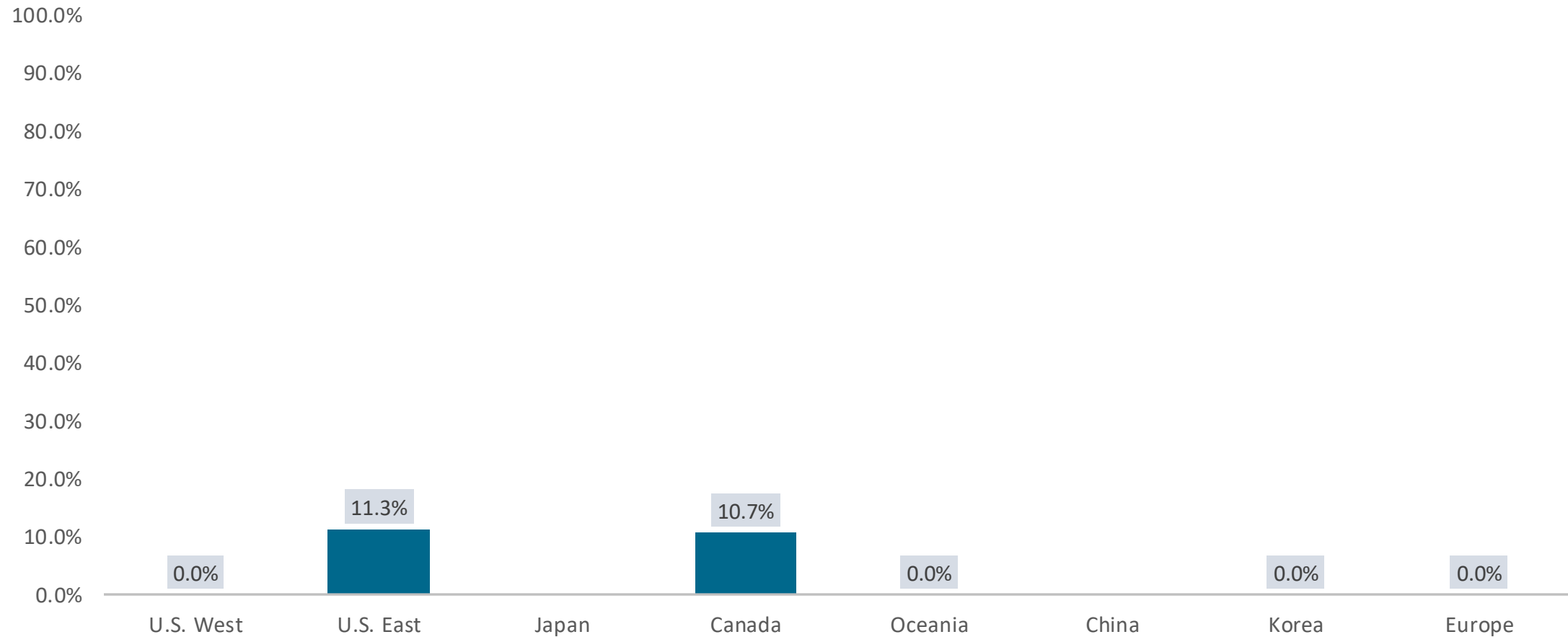
* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN MUSIC - MOLOKA'I



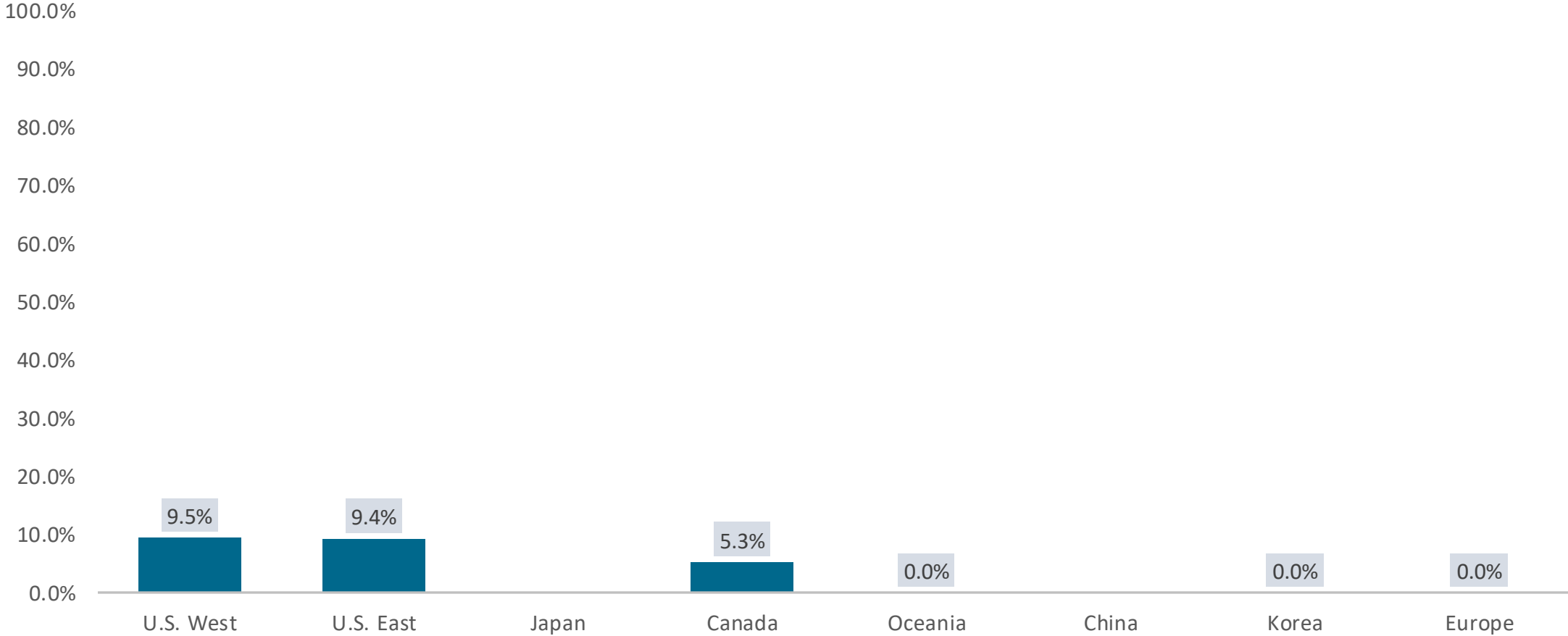
* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

IMPACT OF SOCIAL MEDIA POSTS/VIDEOS - MOLOKA'I



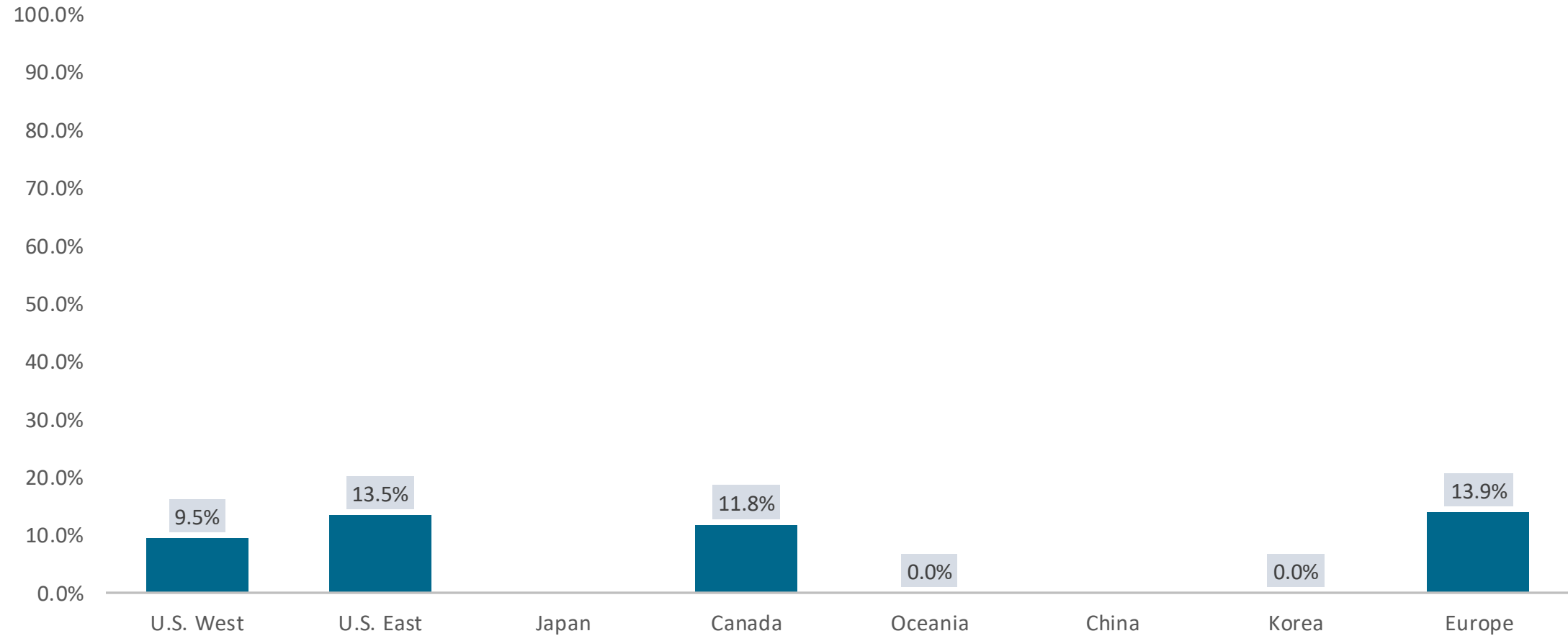
* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

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



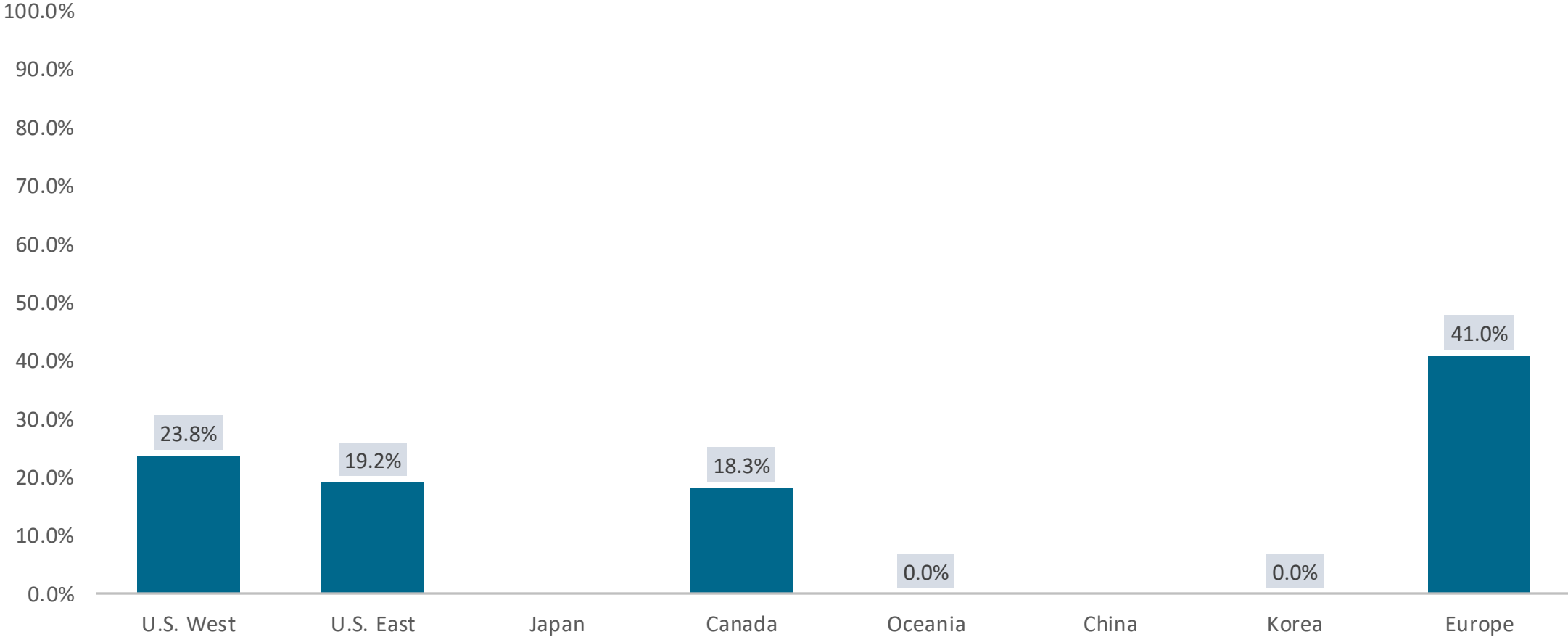
* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

IMPACT OF HAWAIIAN CULTURAL EVENTS - MOLOKA'I



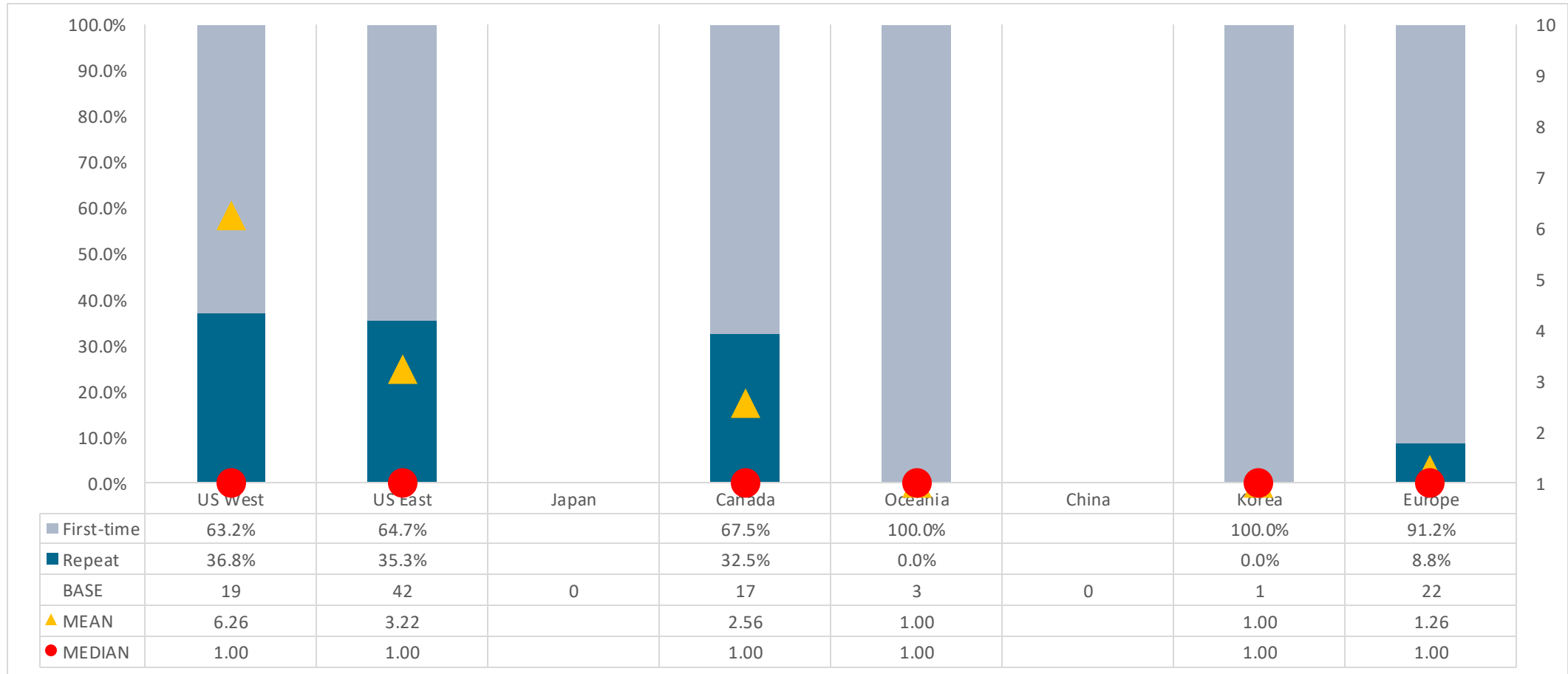
* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - MOLOKA'I



* There were no visitors from Japan and China who took part in the study who visited Moloka'i.

1st TIME VS REPEAT VISITOR – MOLOKA'I



STRENGTHS/ POSITIVE ASPECTS - MOLOKA'I

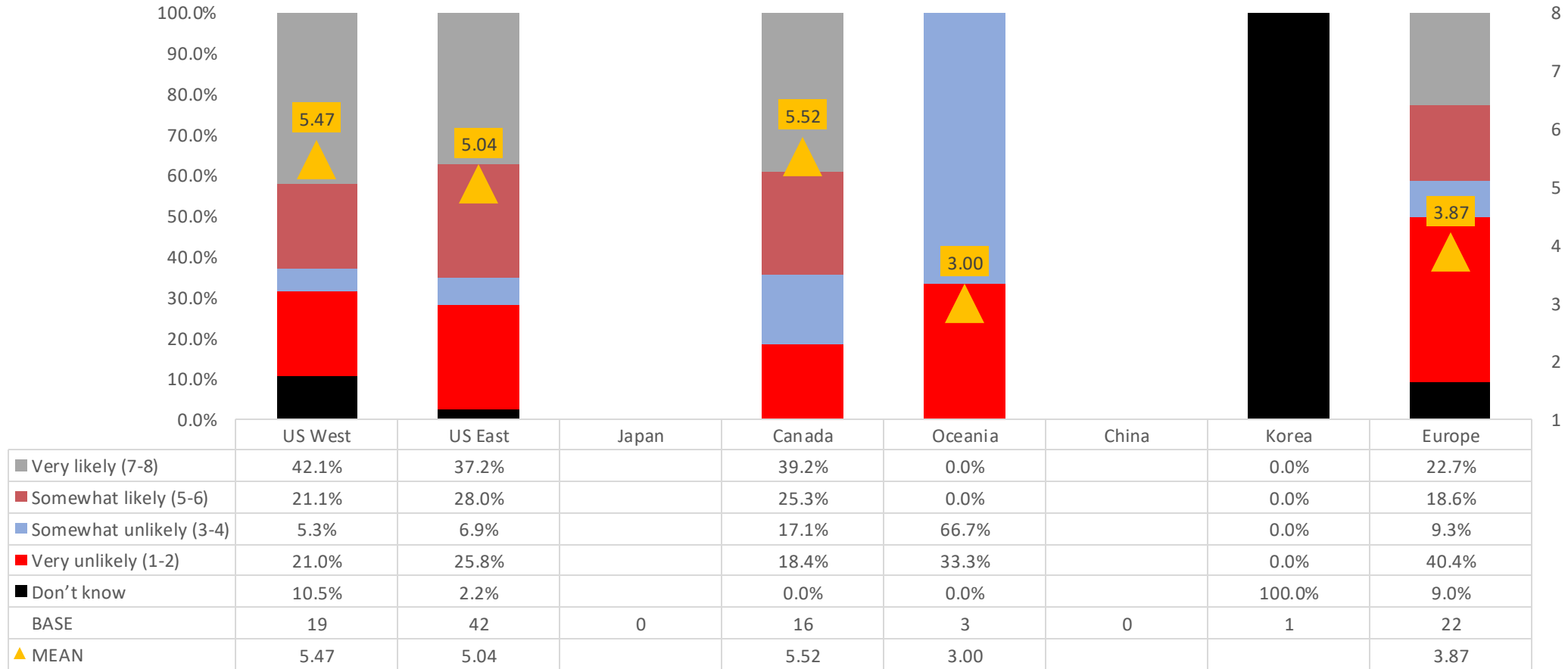
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Nature/ natural beauty/ scenery	10.5%	19.2%	0.0%	19.6%	0.0%	0.0%	0.0%	32.0%
Friendliness of the local people	21.1%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
Beach/ ocean	15.8%	2.5%	0.0%	6.9%	0.0%	0.0%	0.0%	9.0%
Variety of activities/ attractions/ many choices	0.0%	18.2%	0.0%	17.1%	0.0%	0.0%	0.0%	13.9%
Feeling of the "Aloha Spirit"	5.3%	10.1%	0.0%	11.4%	0.0%	0.0%	0.0%	0.0%
Activities/ attractions (not specified as part of a package)	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
Events/ celebrations with friends/ family	0.0%	7.6%	0.0%	12.7%	0.0%	0.0%	100.0%	0.0%
Not crowded/ few tourists	5.3%	2.5%	0.0%	12.7%	0.0%	0.0%	0.0%	8.8%

AREAS OF OPPORTUNITIES - MOLOKA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	31.6%	45.0%	0.0%	34.3%	100.0%	0.0%	0.0%	68.0%
Food/ restaurant variety/ dining options	10.5%	4.7%	0.0%	13.9%	0.0%	0.0%	0.0%	9.3%
Friendliness of local people	10.6%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Accommodations/ cleanliness/ upkeep	10.5%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
Variety of activities/ attractions	0.0%	9.4%	0.0%	5.7%	0.0%	0.0%	0.0%	9.0%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	0.0%	6.6%	0.0%	19.6%	0.0%	0.0%	0.0%	4.6%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	5.3%	2.5%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%
Commercialization/ urbanization/ crowds/ loss of Local Culture)	5.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Driving experience (signage, road surface, traffic violations, bad drivers)	5.3%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Would like to experience more local culture	5.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

LIKELIHOOD OF RETURN VISIT - MOLOKA'I

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

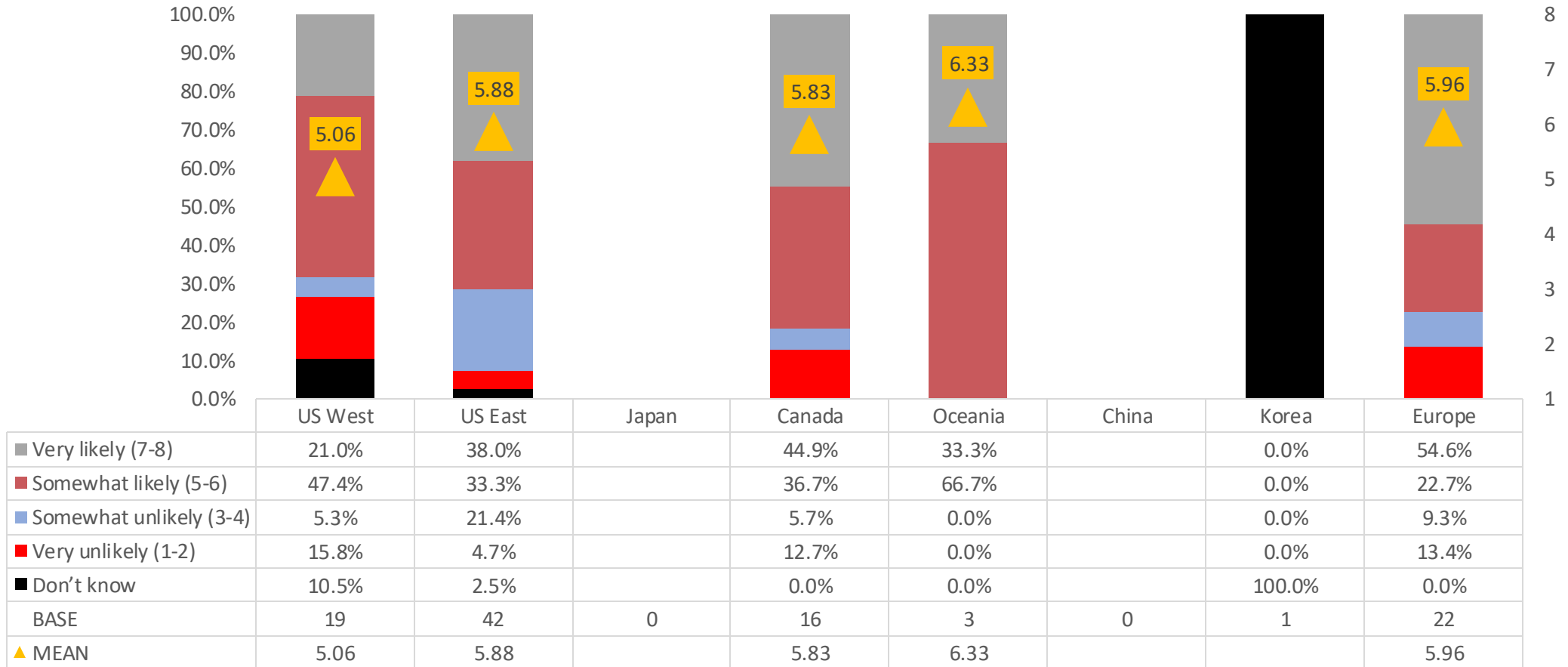


REASONS FOR NOT RETURNING - MOLOKA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Nothing to do/ boring	28.5%	25.1%	0.0%	0.0%	0.0%	0.0%	0.0%	23.3%
Want to go someplace new	28.5%	7.2%	0.0%	48.3%	100.0%	0.0%	0.0%	7.9%
Too expensive/ cost	14.3%	26.1%	0.0%	32.2%	0.0%	0.0%	0.0%	31.2%
Flight too long	0.0%	37.7%	0.0%	16.1%	0.0%	0.0%	0.0%	46.0%
Not enough value for the price	14.4%	12.6%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
No reason to return/ nothing new	0.0%	28.0%	0.0%	16.1%	0.0%	0.0%	0.0%	15.3%
Other (please specify)	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%
Too crowded/ congested/ traffic	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Too commercial/ overdeveloped	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Not enough flight options to Moloka'i	0.0%	14.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%

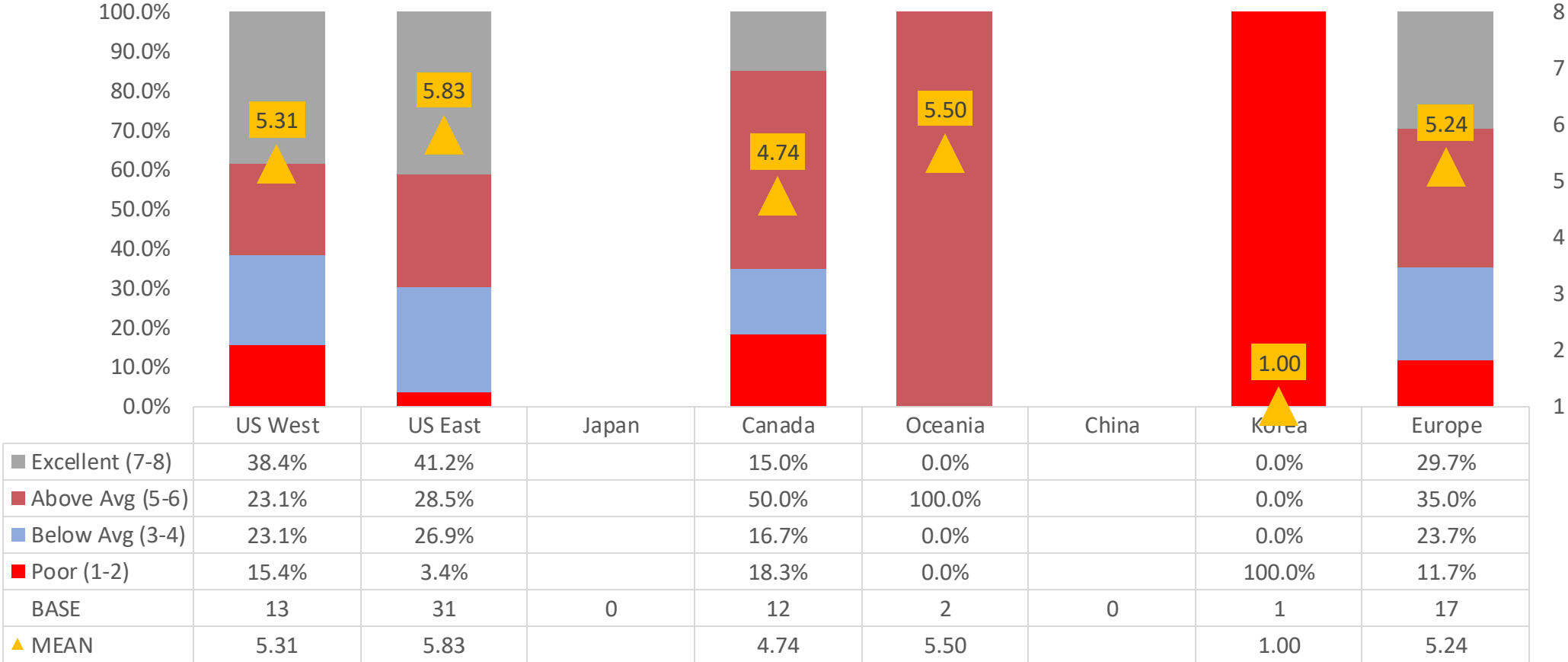
BRAND/ DESTINATION ADVOCACY - MOLOKA'I

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



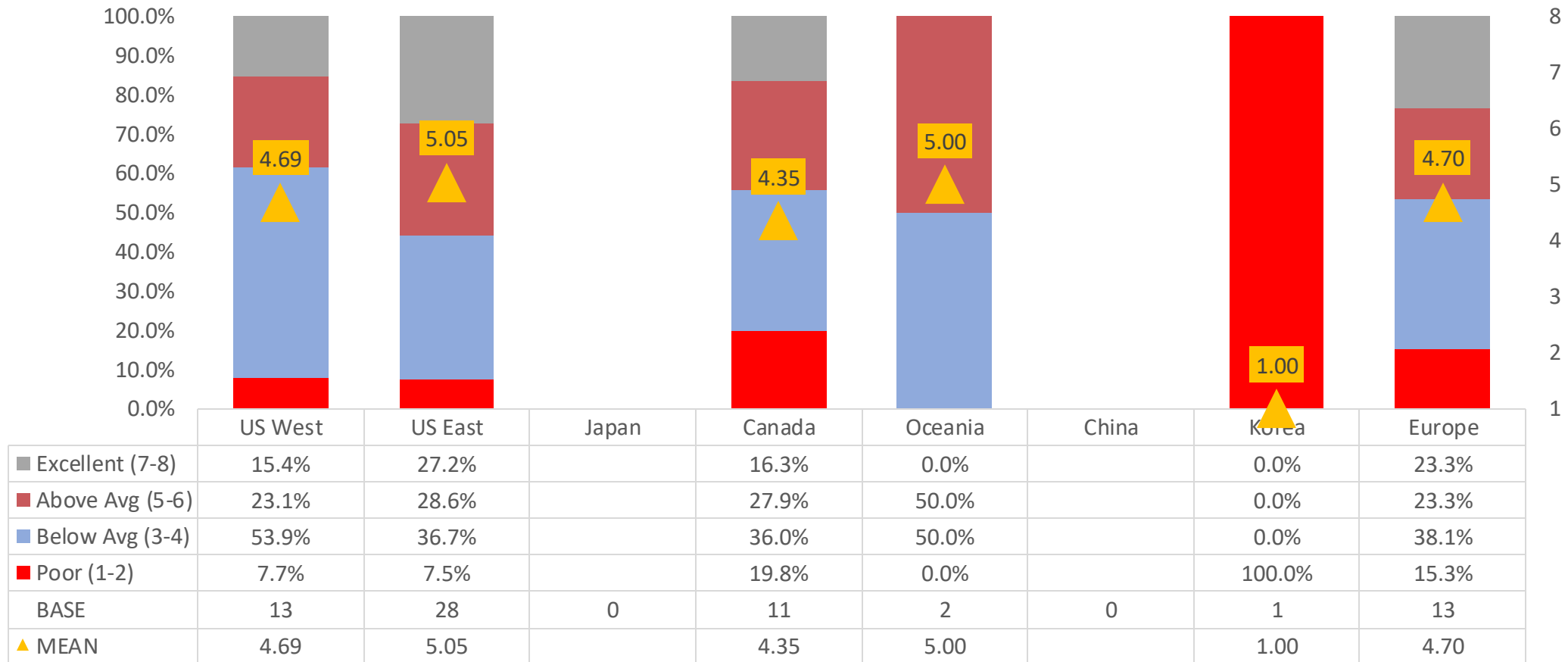
ENTERTAINMENT/ ATTRACTIONS - MOLOKA'I

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



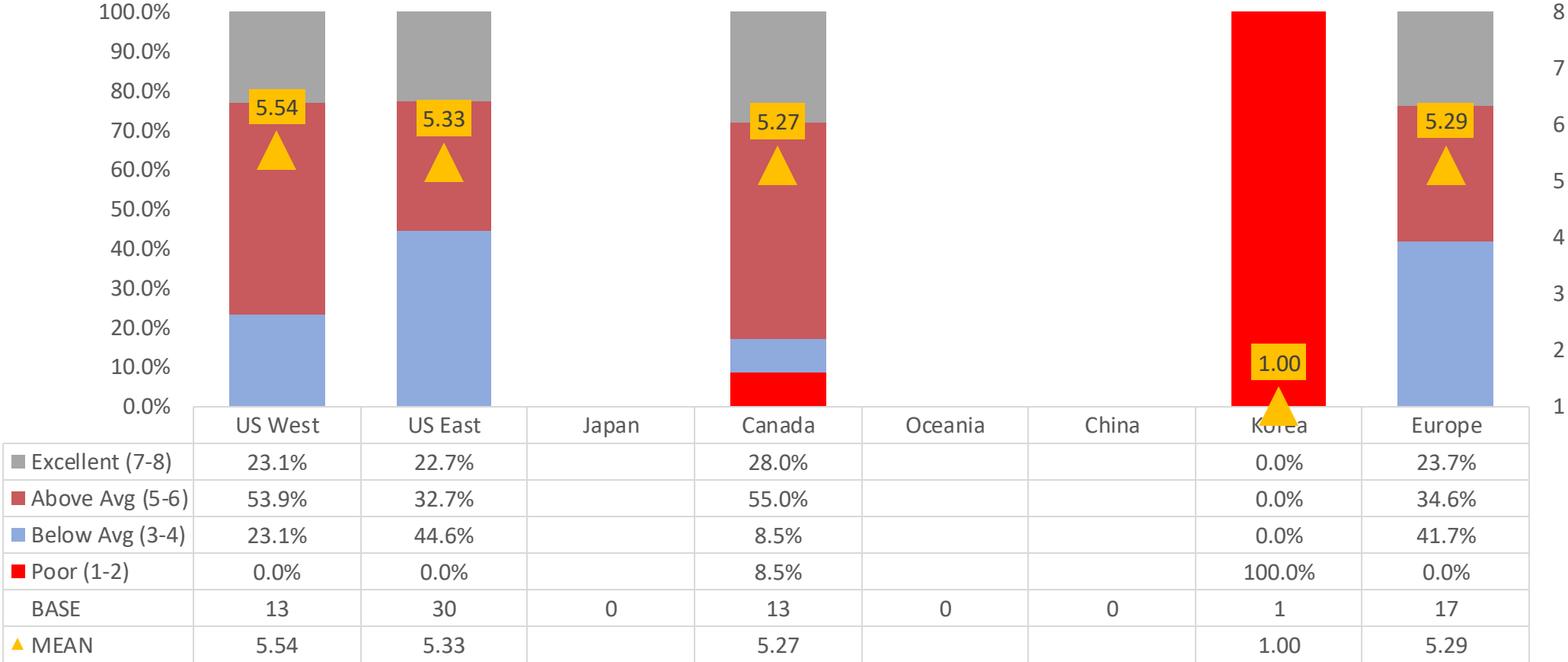
SHOPPING - MOLOKA'I

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



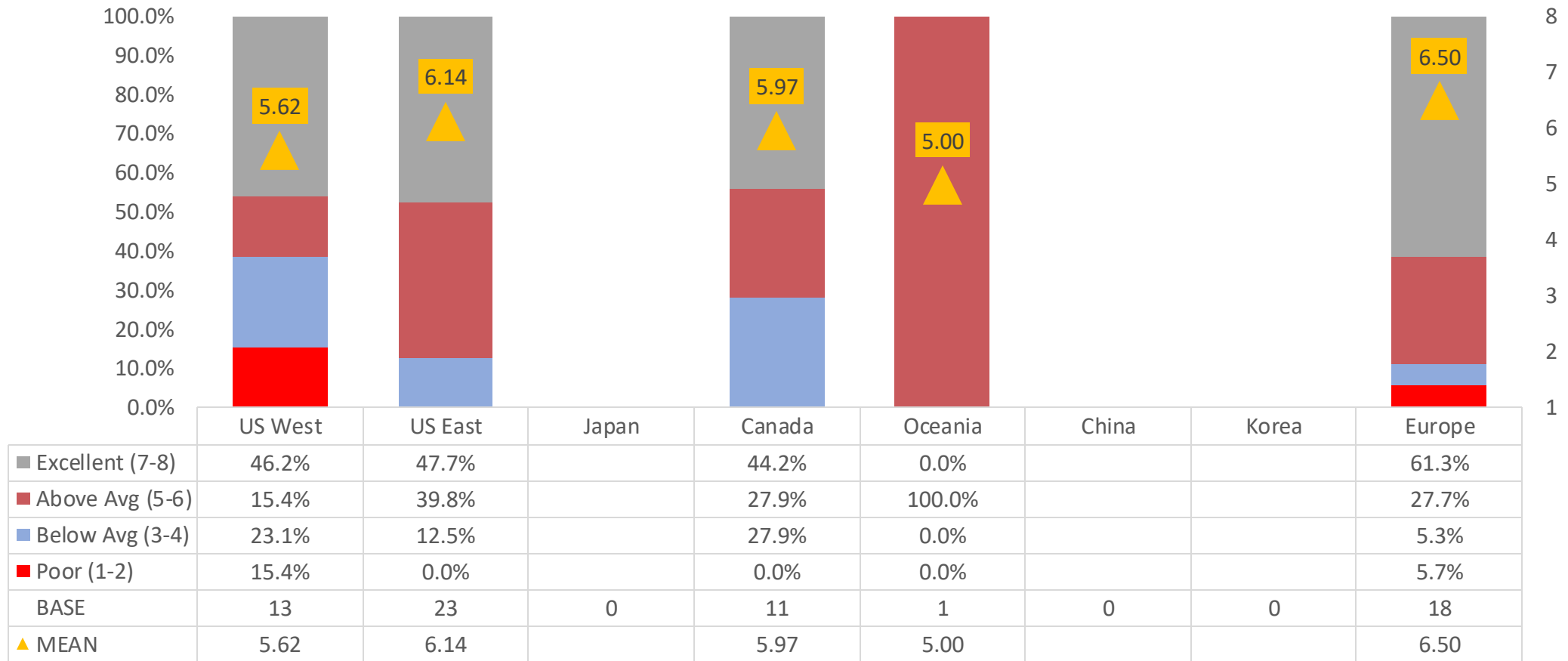
DINING/ FOOD & BEVERAGE - MOLOKA'I

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



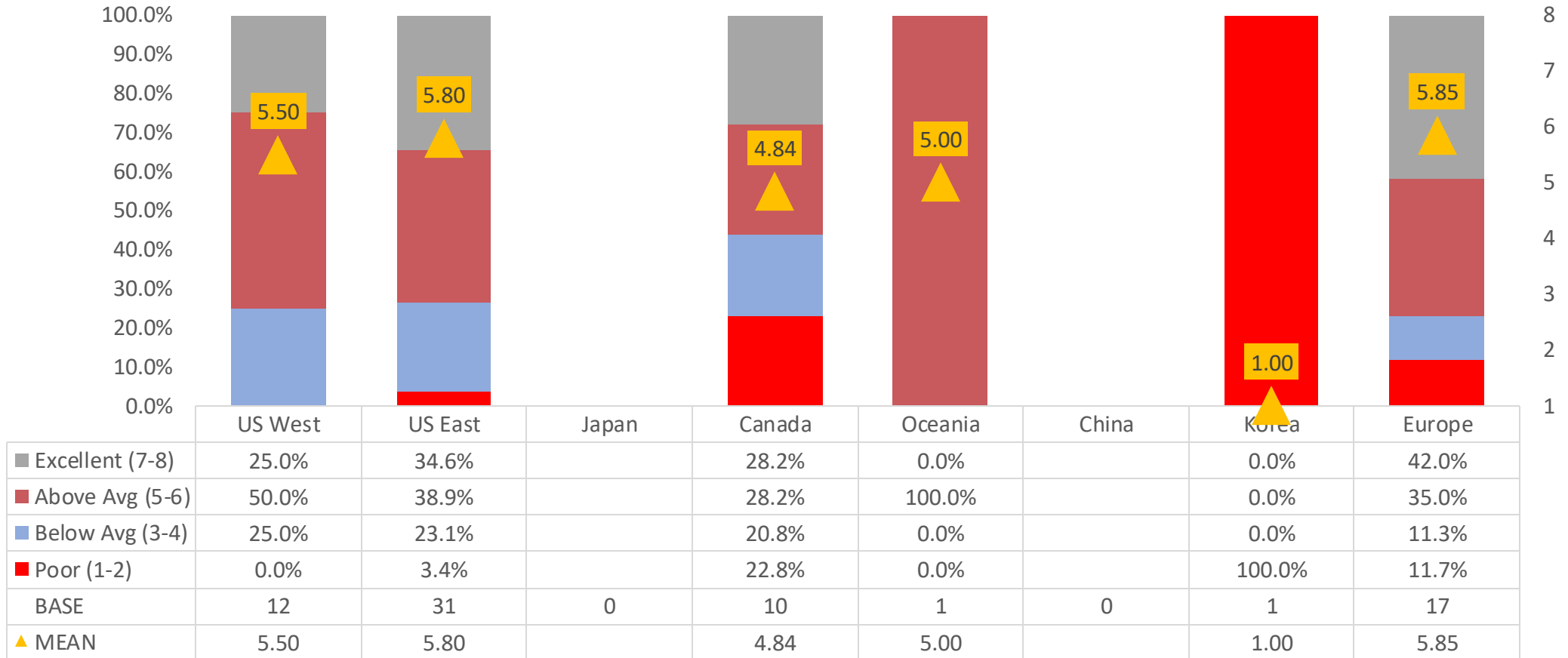
LODGING/ ACCOMMODATIONS - MOLOKA'I

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



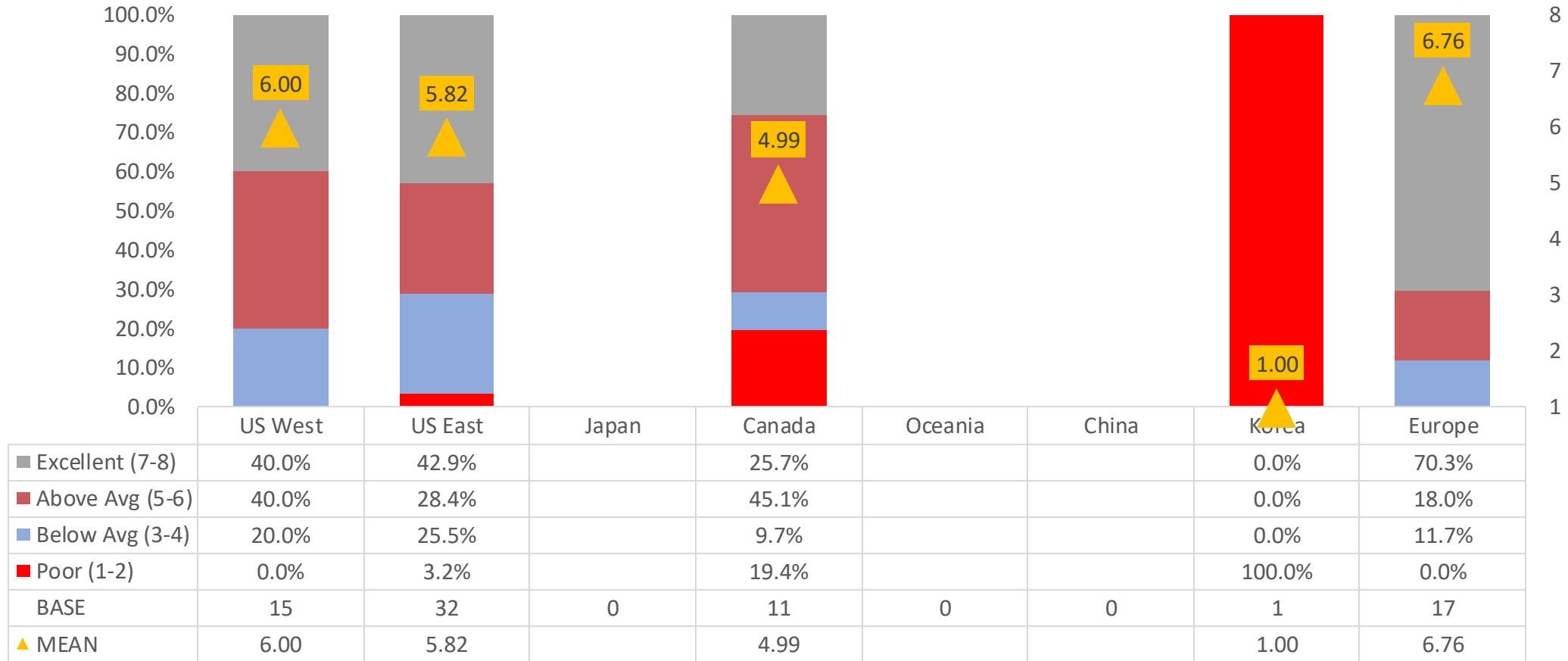
TRANSPORTATION ON ISLAND - MOLOKA'I

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



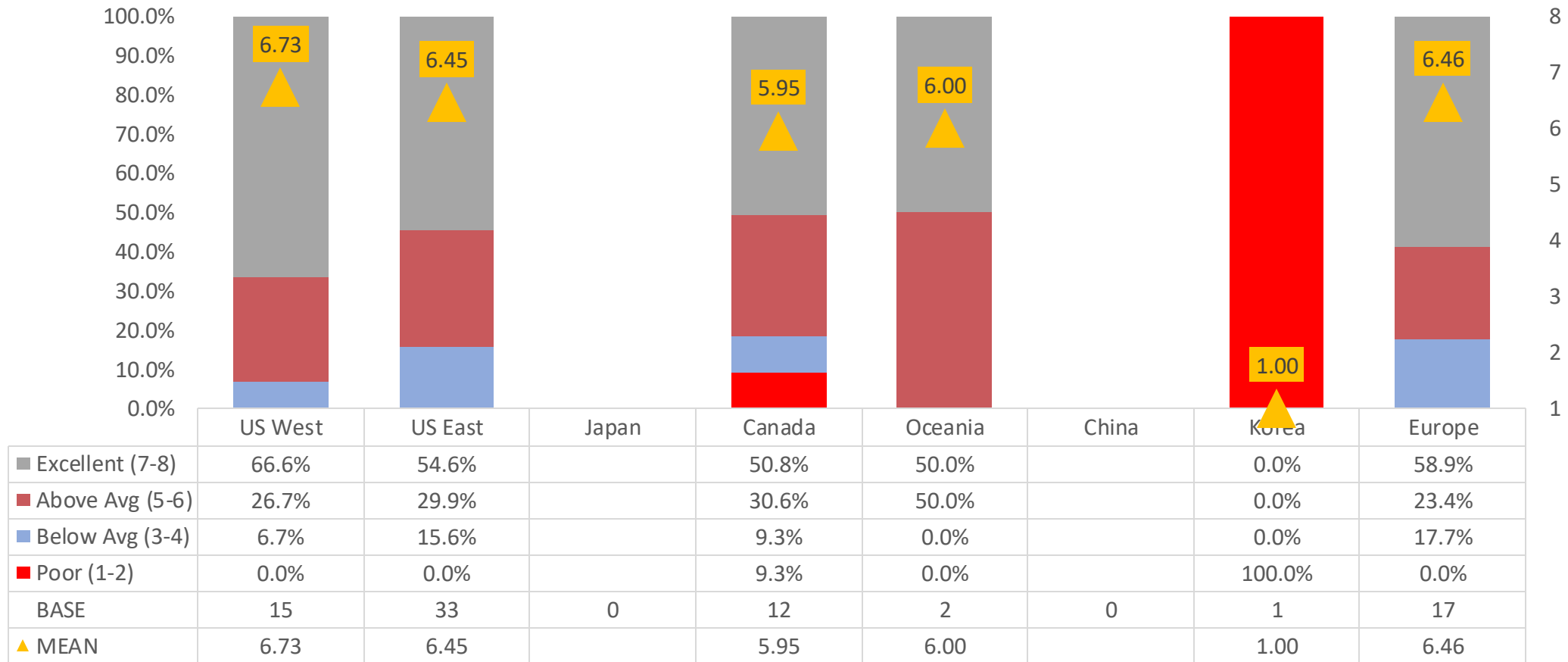
AIRPORT - MOLOKA'I

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



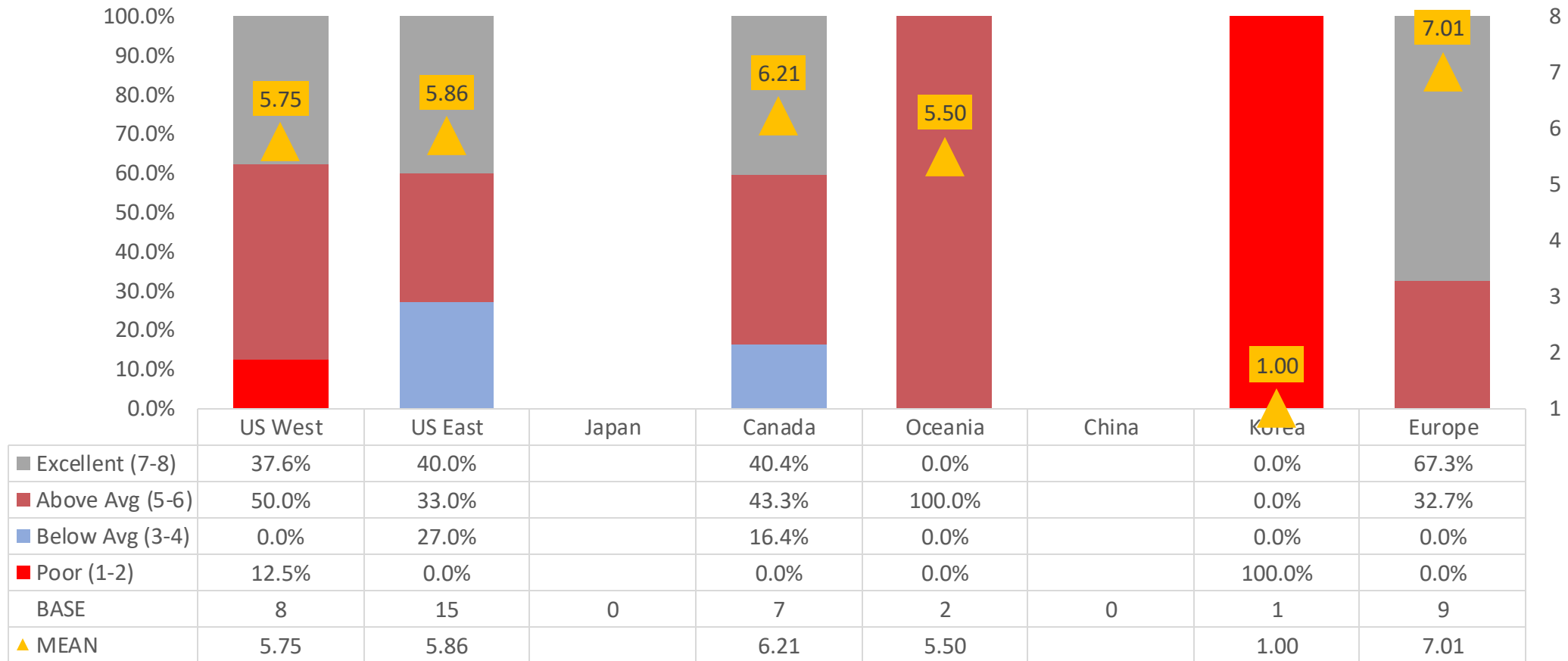
CULTURAL EXPERIENCES - MOLOKA'I

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



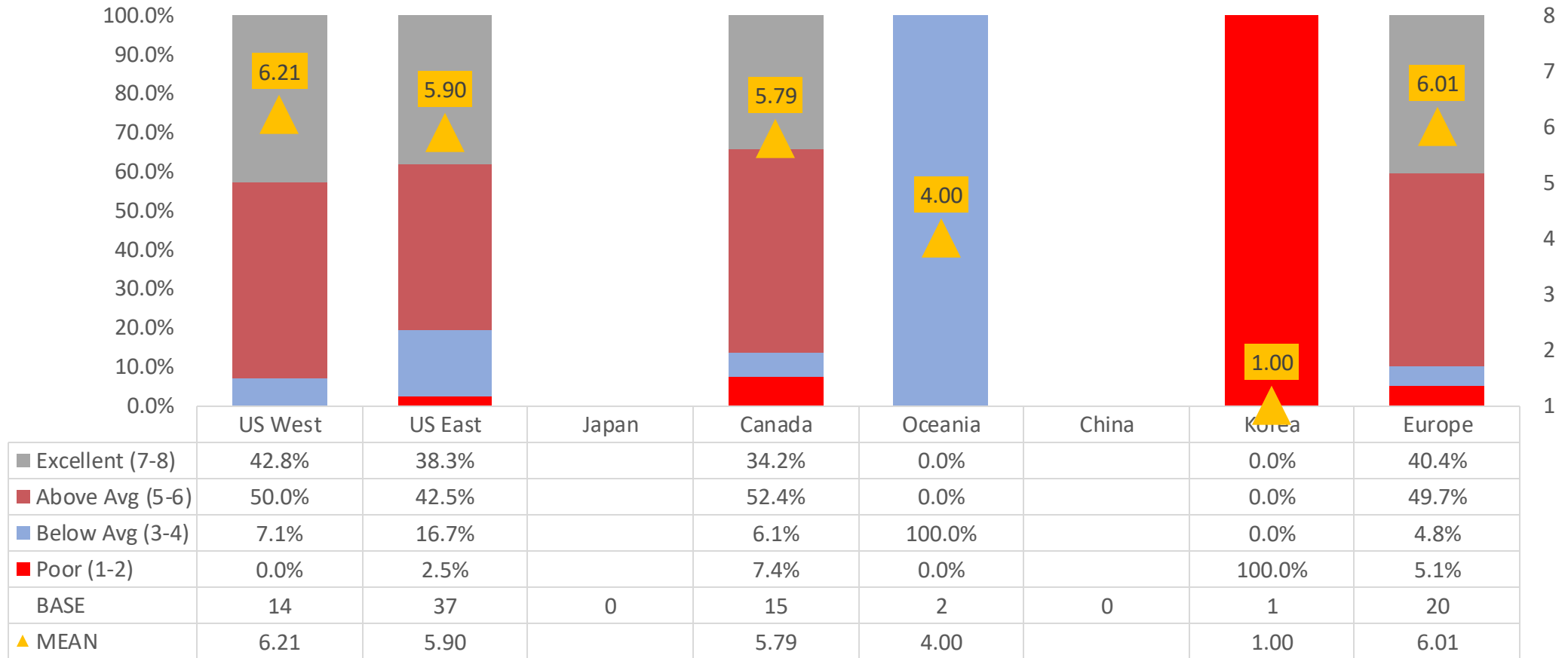
VOLUNTEER EXPERIENCES - MOLOKA'I

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



VALUE FOR THE MONEY - MOLOKA'I

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



MOLOKA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.5%	100.0%	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%
On own (self-guided)/ driving around the island	77.7%	62.5%	0.0%	87.9%	0.0%	0.0%	100.0%	68.3%
Helicopter ride/ airplane tour	11.1%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%
Boat tour/ submarine ride/ whale watching	5.5%	12.6%	0.0%	7.4%	0.0%	0.0%	0.0%	9.0%
Visiting towns/ communities	33.3%	45.8%	0.0%	42.9%	0.0%	0.0%	0.0%	27.1%
Private limousine/ van tour/ tour bus	0.0%	16.4%	0.0%	6.1%	50.0%	0.0%	0.0%	22.4%
Scenic views/ natural landmarks	44.4%	61.8%	0.0%	61.0%	50.0%	0.0%	0.0%	50.0%
Movie and TV filming location tours	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

MOLOKA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	77.8%	87.8%	0.0%	93.9%	100.0%	0.0%	100.0%	77.1%
Beach/ sunbathing	55.5%	53.2%	0.0%	81.8%	0.0%	0.0%	0.0%	54.4%
Bodyboarding	5.5%	2.6%	0.0%	13.4%	0.0%	0.0%	0.0%	0.0%
Stand-up paddle boarding	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Surfing	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%
Canoe paddling	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kayaking	11.1%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Swimming in the ocean	44.4%	37.3%	0.0%	41.6%	0.0%	0.0%	100.0%	45.6%
Snorkeling	22.2%	17.4%	0.0%	13.4%	0.0%	0.0%	0.0%	8.8%
Freediving	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%
Windsurfing/ kitesurfing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Jet skiing/ parasailing	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scuba diving	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
Fishing	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Golf	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

MOLOKA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	77.8%	87.8%	0.0%	93.9%	100.0%	0.0%	100.0%	77.1%
Running/ jogging/ fitness walking	16.6%	15.5%	0.0%	22.1%	0.0%	0.0%	0.0%	9.3%
Cycling	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%
Spa	5.5%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hiking	22.2%	42.5%	0.0%	47.6%	50.0%	0.0%	0.0%	27.1%
Backpacking/ camping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agritourism	22.2%	19.3%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%
Sports event or tournament	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Parks/ botanical gardens	16.6%	21.2%	0.0%	34.2%	50.0%	0.0%	0.0%	31.2%
Waterparks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mountain tubing/ waterfall rappel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zip-lining	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Skydiving	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Horseback riding	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

MOLOKA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Korea
TOTAL	77.8%	80.7%	0.0%	100.0%	100.0%	0.0%	100.0%	82.0%
Lunch/ sunset/ dinner/ evening cruise	5.5%	11.2%	0.0%	12.1%	0.0%	0.0%	0.0%	18.0%
Live music/ stage show	22.2%	9.3%	0.0%	47.6%	0.0%	0.0%	0.0%	4.6%
Nightclub/ dancing/ bar/ karaoke	5.5%	0.0%	0.0%	13.4%	0.0%	0.0%	0.0%	0.0%
Fine dining	16.6%	7.7%	0.0%	25.5%	0.0%	0.0%	100.0%	9.0%
Family restaurant	38.9%	27.4%	0.0%	36.8%	0.0%	0.0%	100.0%	22.9%
Fast food	5.5%	14.5%	0.0%	25.5%	0.0%	0.0%	0.0%	26.8%
Food truck	27.7%	14.5%	0.0%	40.3%	0.0%	0.0%	0.0%	4.6%
Café/ coffee house	16.6%	32.2%	0.0%	34.2%	50.0%	0.0%	0.0%	27.1%
Ethnic dining	5.5%	4.8%	0.0%	14.7%	0.0%	0.0%	0.0%	0.0%
Farm-to-table cuisine	11.1%	2.6%	0.0%	0.0%	0.0%	0.0%	100.0%	4.4%
Prepared own meal	50.0%	40.3%	0.0%	50.2%	50.0%	0.0%	0.0%	63.7%

MOLOKA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	72.2%	80.7%	0.0%	92.6%	50.0%	0.0%	100.0%	77.3%
Malls/ department stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Designer boutiques	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hotel/ resort stores	11.1%	7.1%	0.0%	18.2%	0.0%	0.0%	100.0%	9.0%
Swap meet/ flea market	16.7%	7.4%	0.0%	7.4%	0.0%	0.0%	0.0%	8.8%
Discount/ outlet stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supermarkets	44.4%	42.5%	0.0%	47.6%	0.0%	0.0%	0.0%	54.9%
Farmer's market	16.6%	25.5%	0.0%	41.6%	0.0%	0.0%	0.0%	22.4%
Convenience stores	33.3%	22.5%	0.0%	13.4%	0.0%	0.0%	0.0%	13.1%
Duty-free stores	5.6%	4.5%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
Hawai'i-made products	27.7%	29.3%	0.0%	35.5%	0.0%	0.0%	100.0%	13.1%
Local shops and artisans	38.8%	57.0%	0.0%	47.6%	50.0%	0.0%	100.0%	22.4%
Local fashion designers	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%

MOLOKA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	49.9%	68.2%	0.0%	67.1%	50.0%	0.0%	100.0%	44.8%
Historic military sites and museums	11.1%	11.9%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%
Historic Hawaiian sites and museums	38.8%	33.7%	0.0%	26.8%	0.0%	0.0%	100.0%	36.1%
Other historical sites, museums, and homes	11.1%	12.2%	0.0%	28.1%	0.0%	0.0%	0.0%	17.8%
Art museums	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Art galleries and exhibitions	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lū'au/ Polynesian show/ hula show	5.5%	11.2%	0.0%	6.1%	50.0%	0.0%	0.0%	0.0%
Lesson- e.g. ukulele, hula, canoe, lei making	5.5%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Play/ concert/ theatre	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Art/ craft fair	11.1%	12.9%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%
Festival/ event	11.1%	4.8%	0.0%	7.4%	0.0%	0.0%	0.0%	4.4%

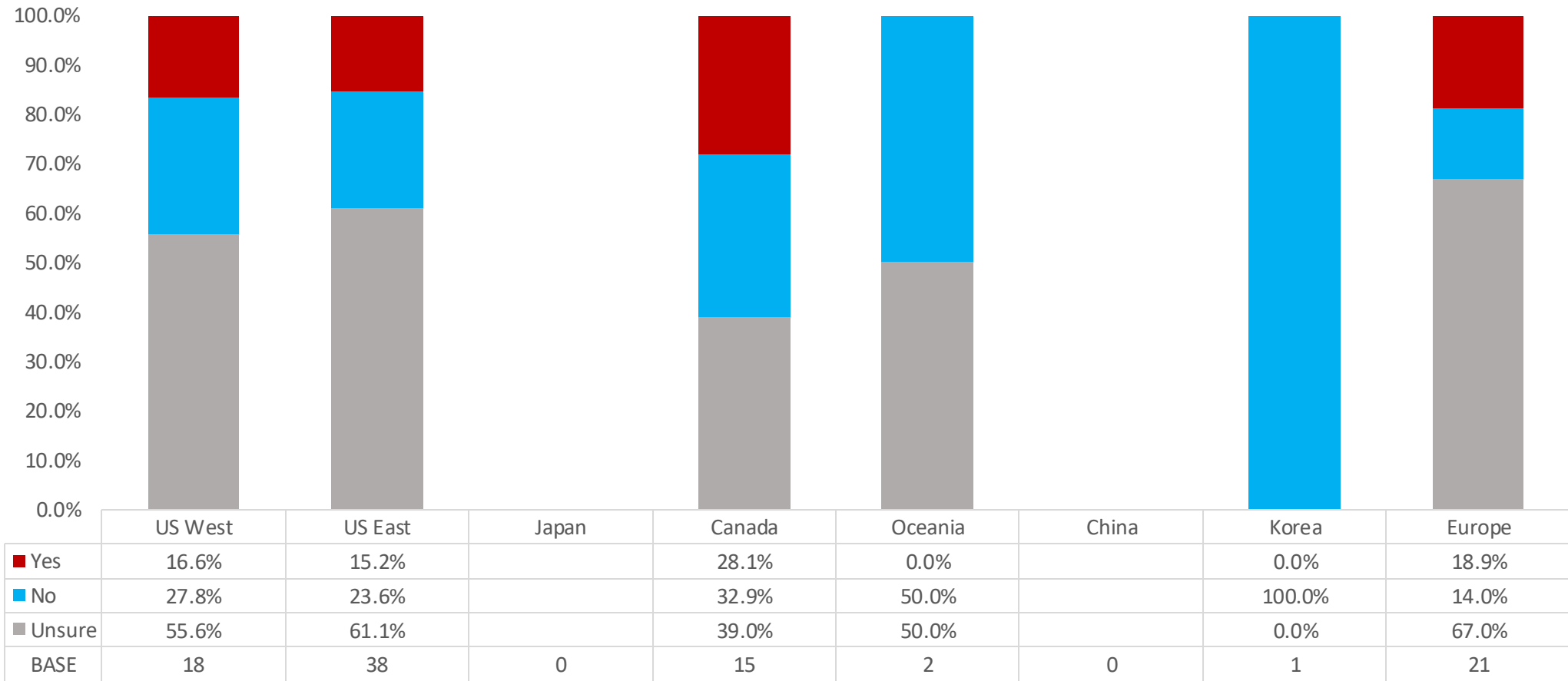
MOLOKA'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	61.1%	65.2%	0.0%	79.2%	100.0%	0.0%	100.0%	72.9%
Airport shuttle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Trolley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Public bus	16.6%	4.8%	0.0%	6.1%	0.0%	0.0%	0.0%	4.6%
Tour bus/ tour van	5.6%	25.0%	0.0%	24.2%	100.0%	0.0%	0.0%	9.0%
Taxi/ limo	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	4.4%
Rental car	38.8%	32.9%	0.0%	47.6%	0.0%	0.0%	0.0%	41.0%
Ride share	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	100.0%	4.6%
Car share	11.1%	5.2%	0.0%	13.4%	0.0%	0.0%	0.0%	9.3%
Bicycle rental	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

MOLOKA'I ACTIVITIES - OTHER

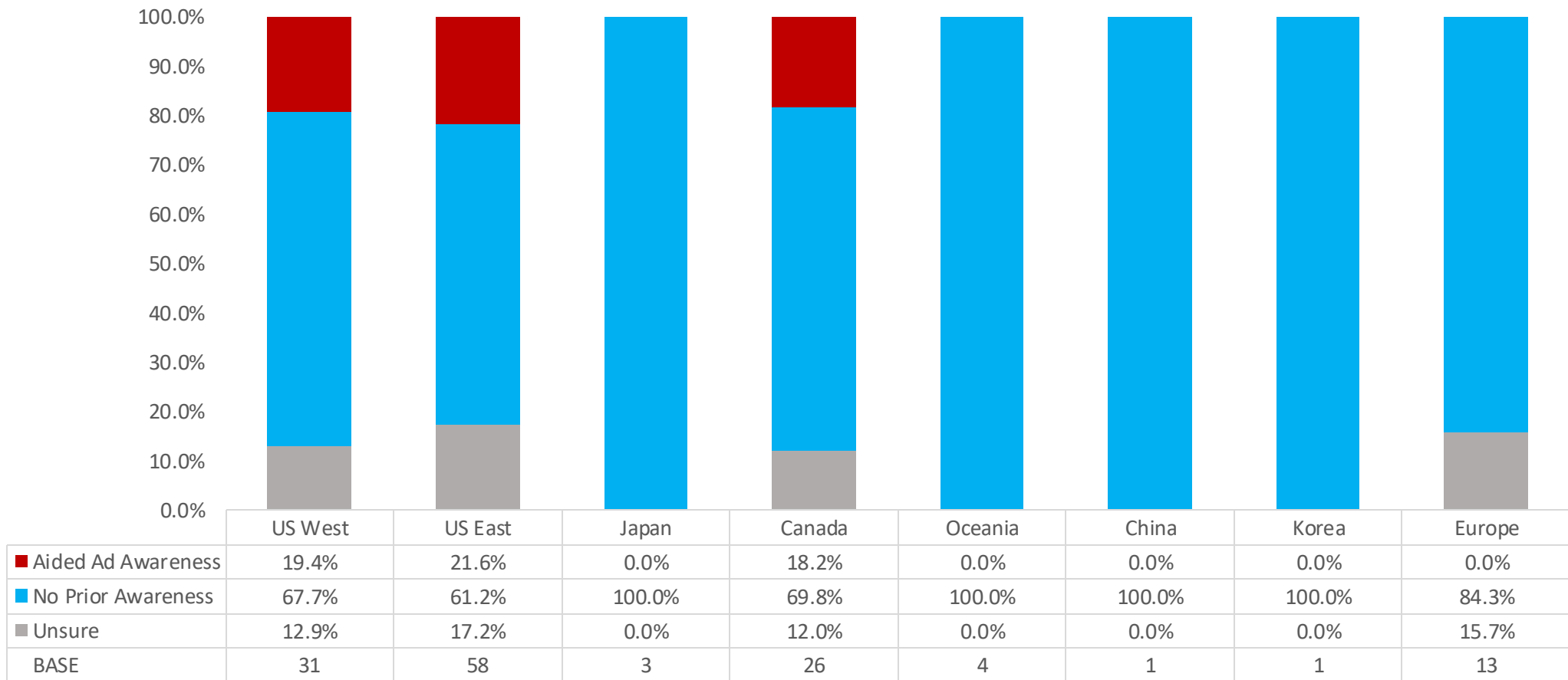
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	22.2%	33.2%	0.0%	22.1%	0.0%	0.0%	100.0%	9.0%
Visiting friends/ relatives	22.2%	28.0%	0.0%	14.7%	0.0%	0.0%	100.0%	4.4%
Giving back to the local community	0.0%	5.2%	0.0%	7.4%	0.0%	0.0%	0.0%	4.6%

MOLOKA'I VISITOR KIOSK

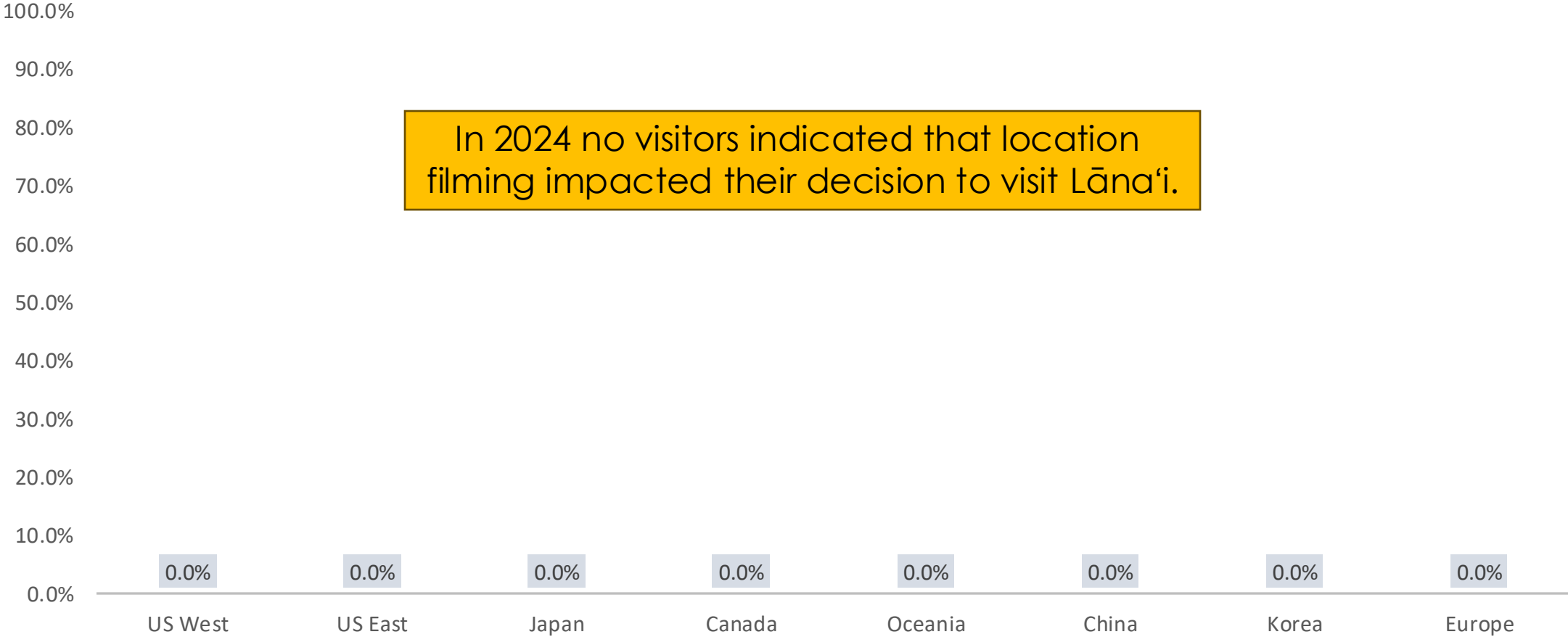


Section 25 - Lānaʻi

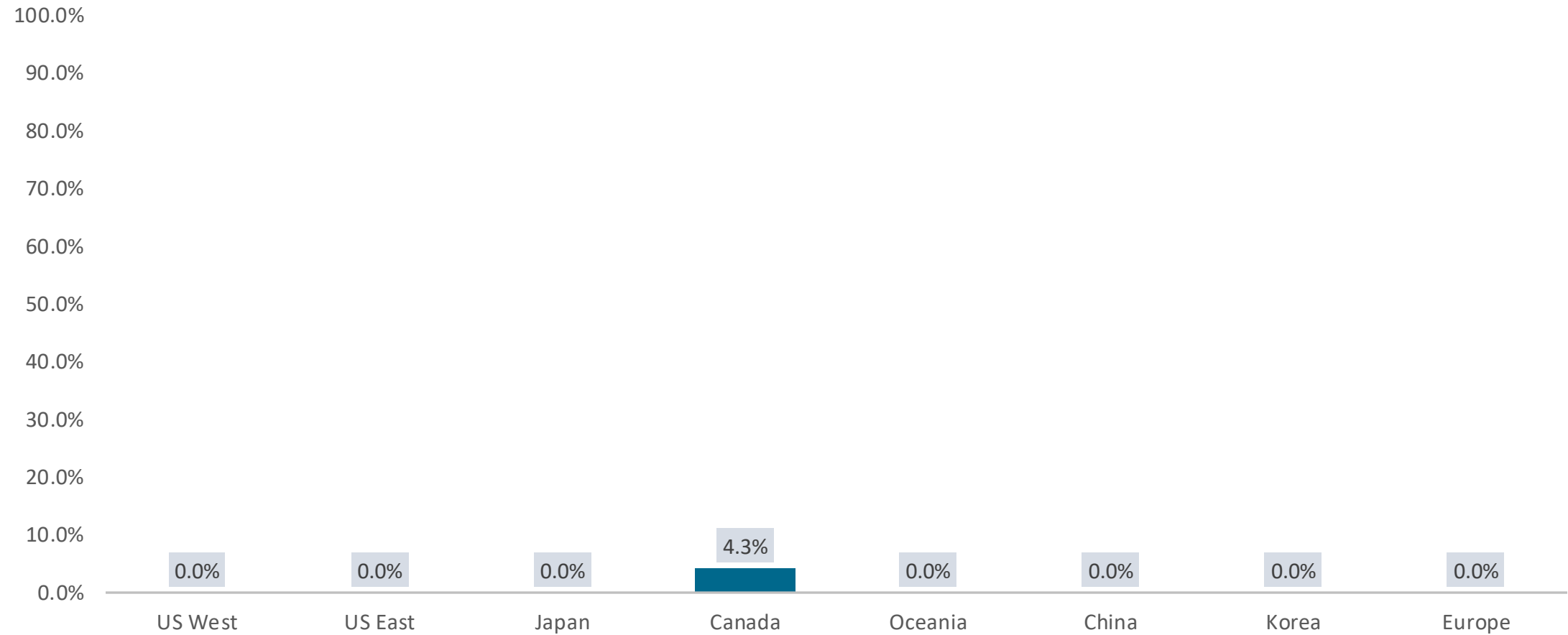
AIDED ADVERTISING AWARENESS - LĀNA'I



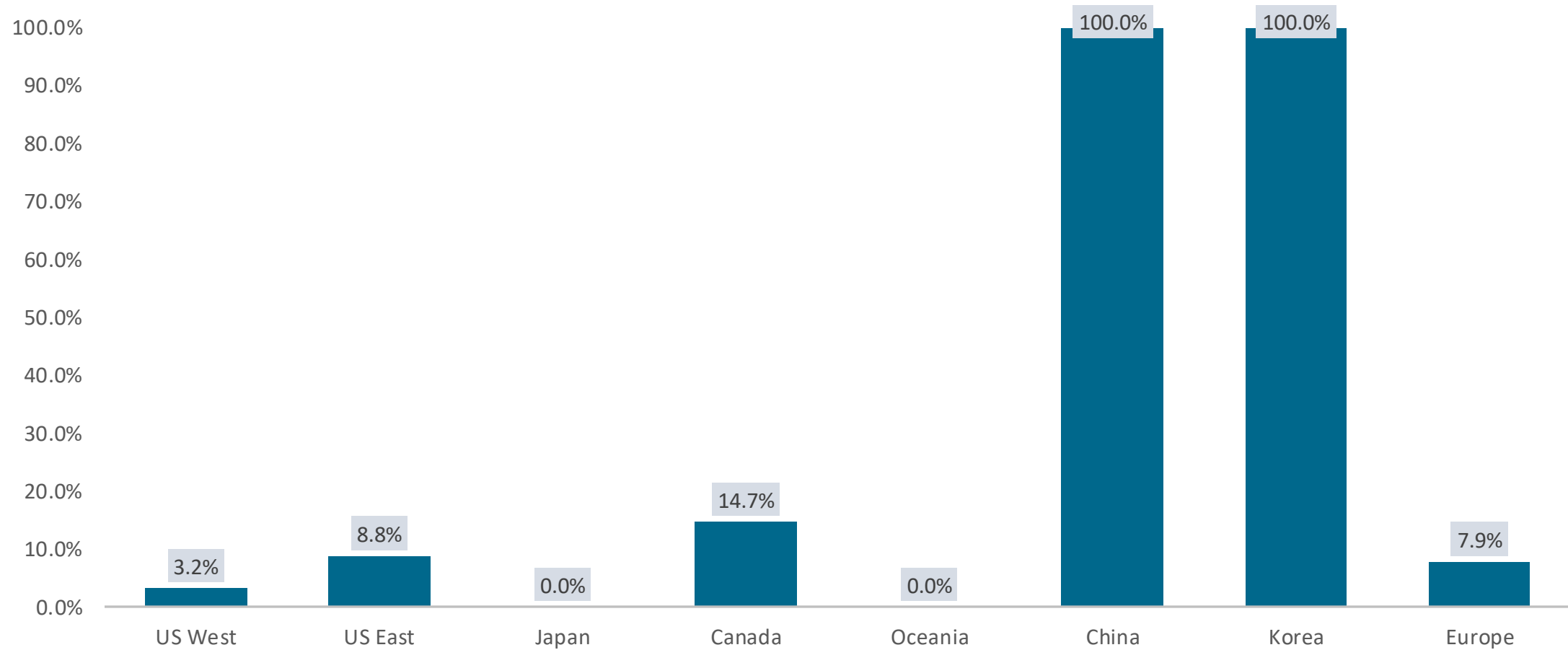
IMPACT OF LOCATION FILMING - LĀNA'I



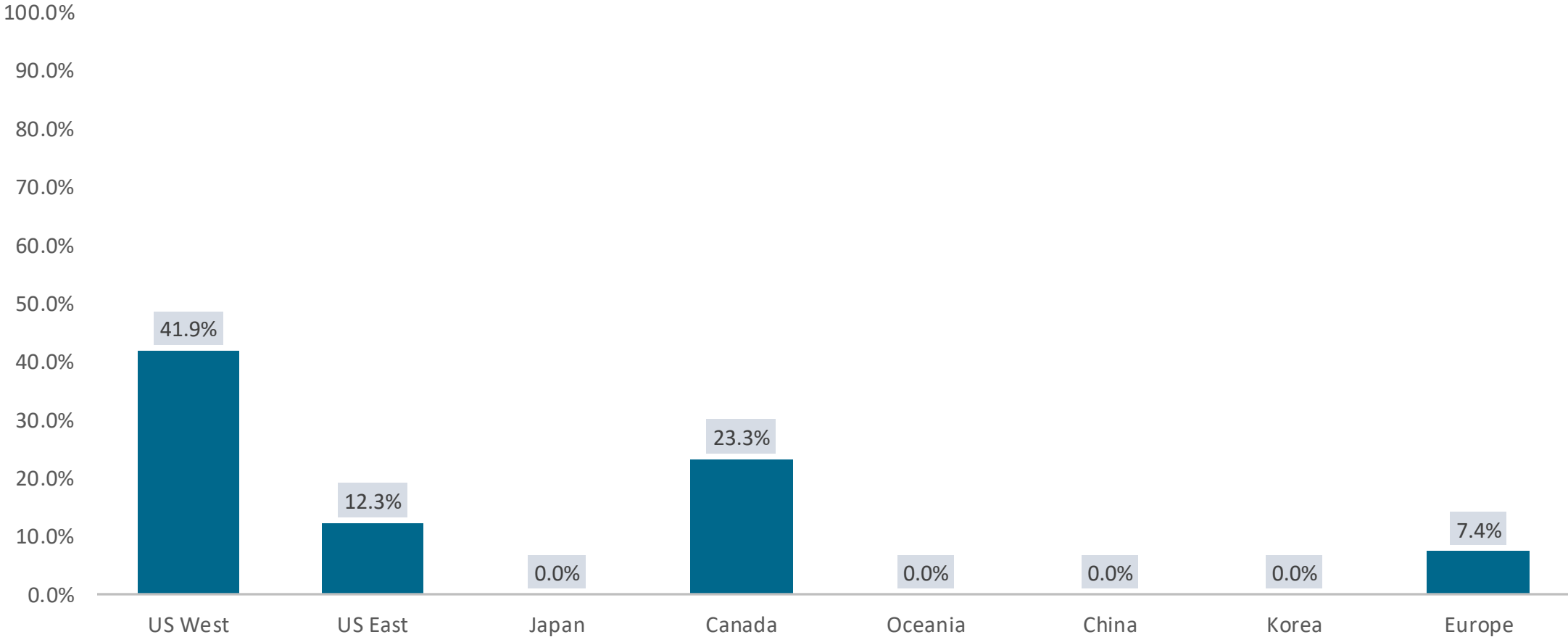
IMPACT OF HAWAIIAN MUSIC - LĀNA'I



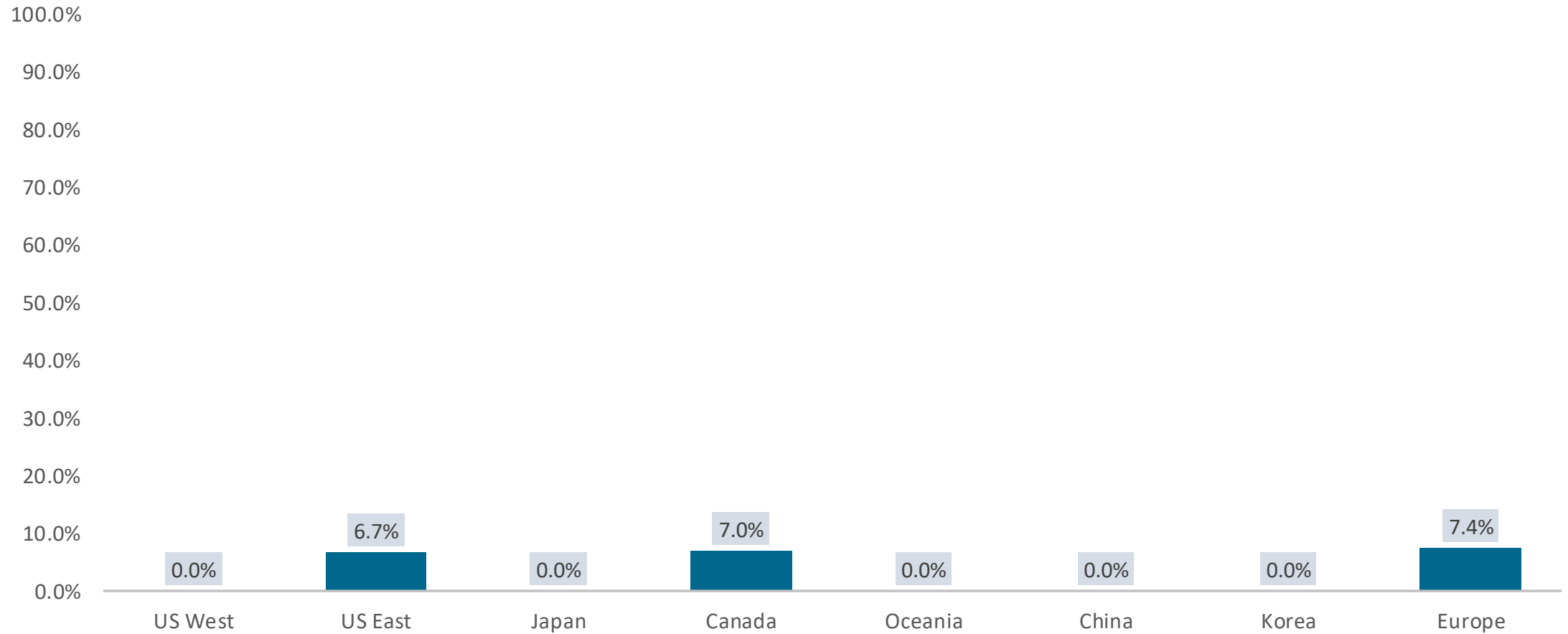
IMPACT OF SOCIAL MEDIA POSTS/VIDEOS - LĀNA'I



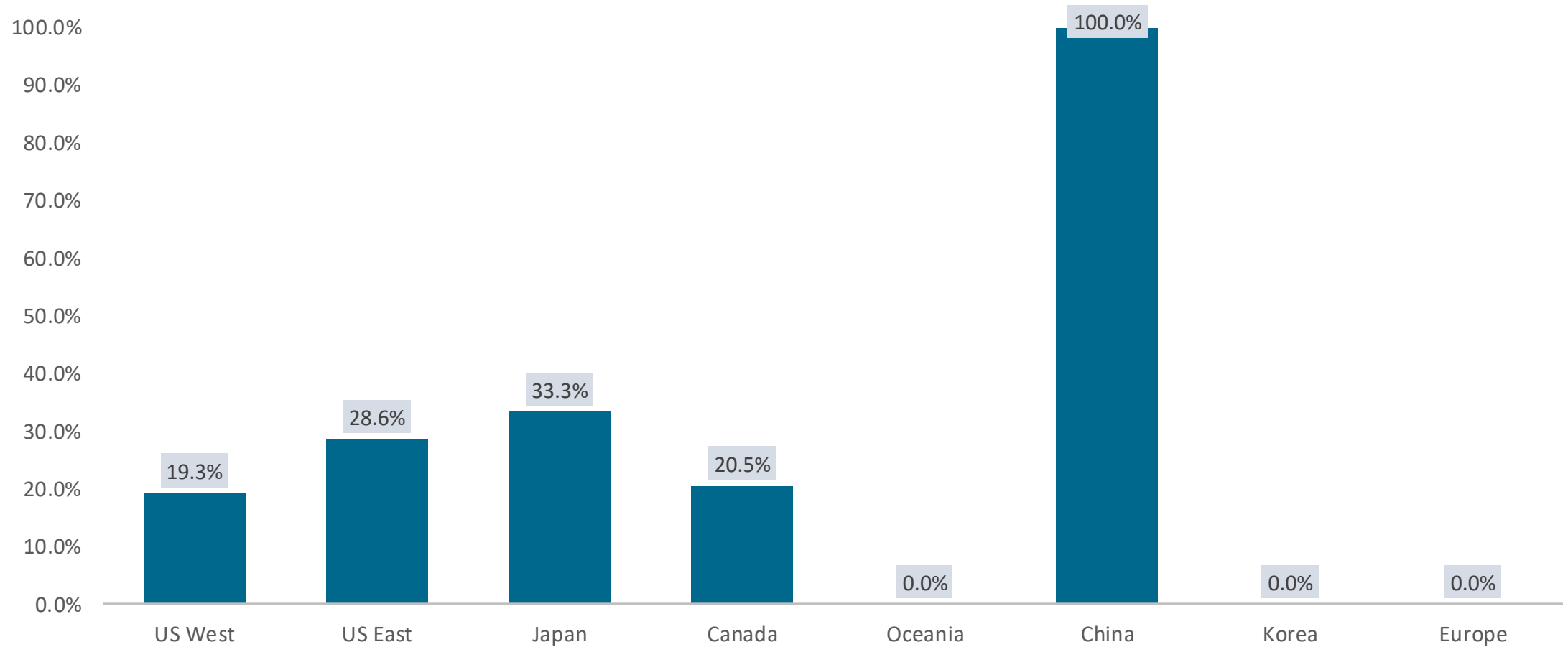
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - LĀNA'I



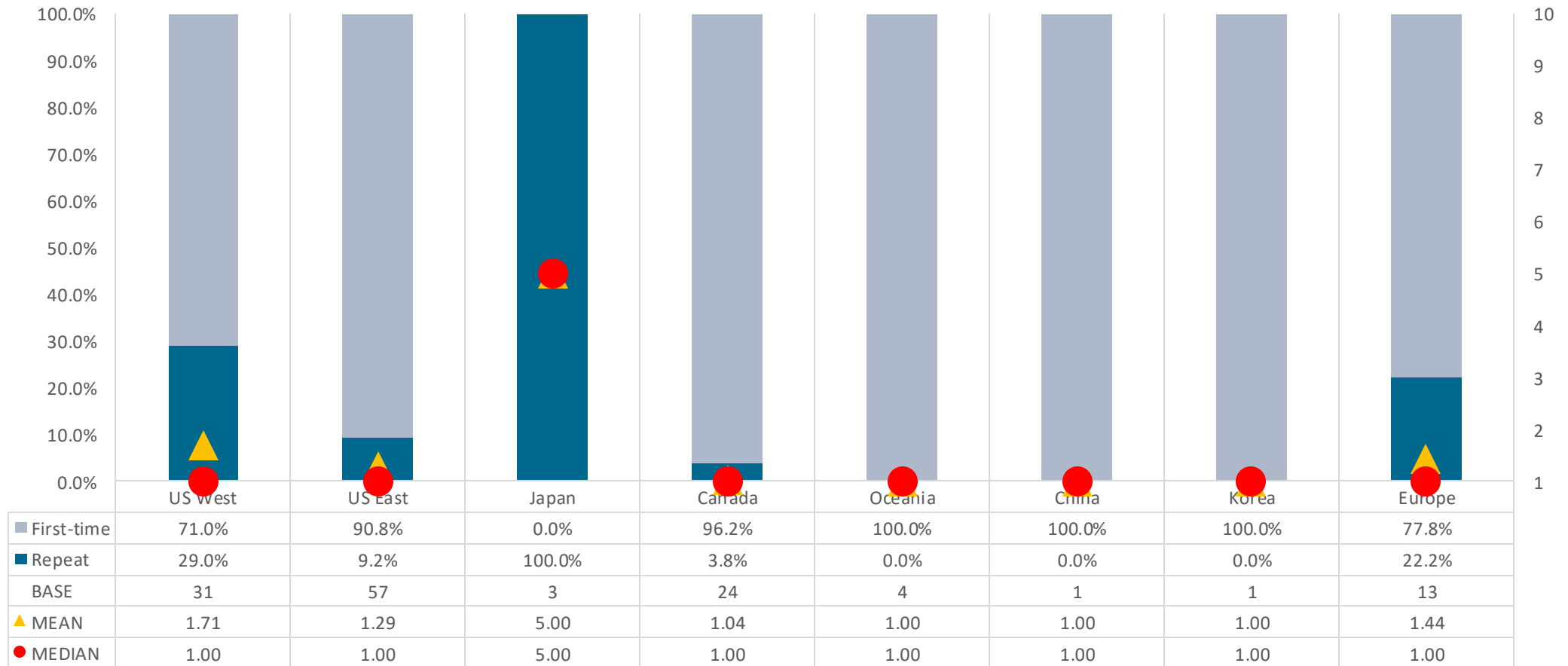
IMPACT OF HAWAIIAN CULTURAL EVENTS - LĀNA'I



IMPACT OF FAMOUS LANDMARKS/ NATURAL BEAUTY - LĀNA'I



1st TIME VS REPEAT VISITOR - LĀNA'I



STRENGTHS/ POSITIVE ASPECTS - LĀNA'I

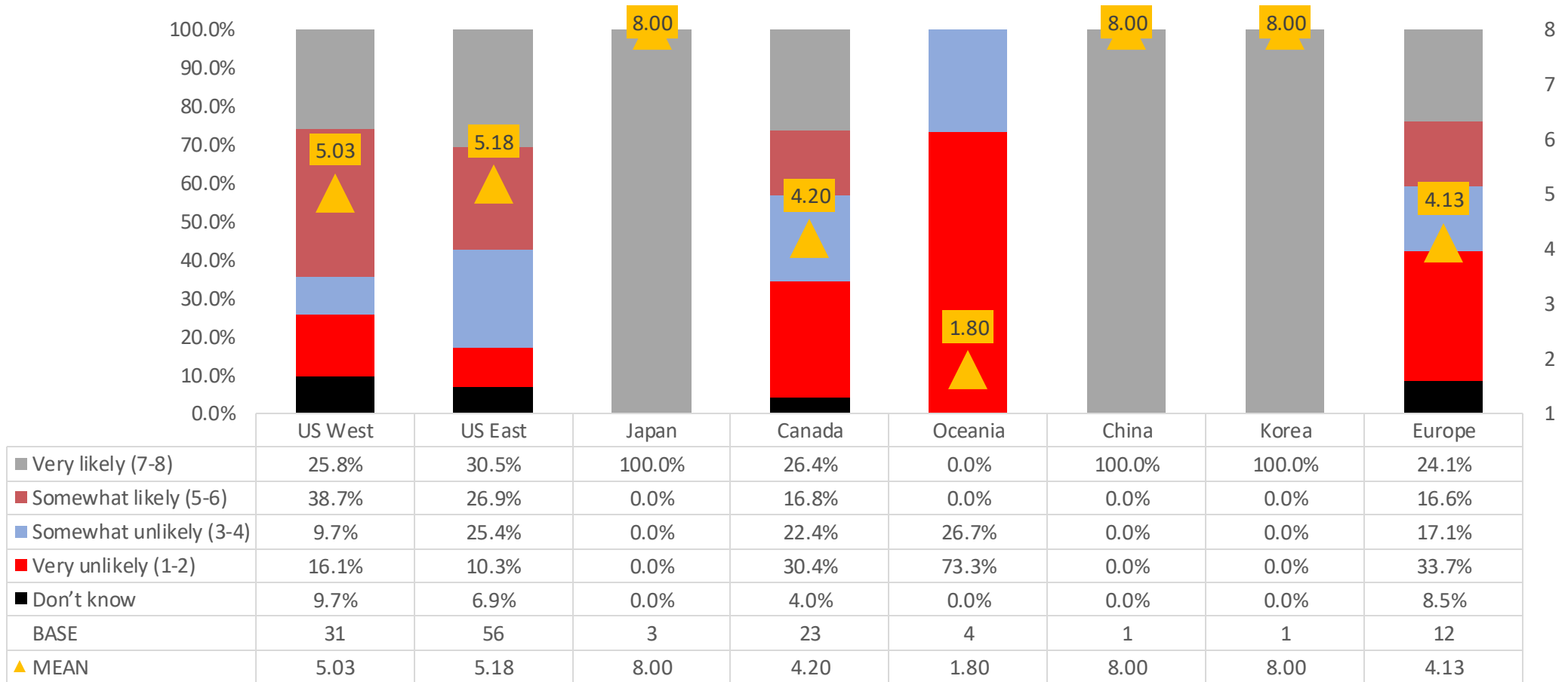
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Beach/ ocean	25.8%	15.8%	0.0%	26.4%	26.7%	0.0%	0.0%	16.1%
Nature/ natural beauty/ scenery	9.7%	16.1%	66.7%	17.6%	0.0%	0.0%	100.0%	41.7%
Friendliness of the local people	9.7%	16.6%	0.0%	0.0%	26.7%	0.0%	0.0%	8.5%
Variety of activities/ attractions/ many choices	9.7%	8.6%	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%
Feeling of the "Aloha Spirit"	12.9%	1.7%	0.0%	0.0%	19.8%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	3.2%	10.8%	0.0%	4.0%	0.0%	0.0%	0.0%	8.5%
Location	3.2%	3.9%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Accommodations/ good service from staff	3.2%	3.3%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%
Availability of ground transportation/ tour buses/ limos, availability of taxi cabs, ride share options etc.	3.2%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

AREAS OF OPPORTUNITIES - LĀNA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	45.2%	70.7%	33.3%	69.6%	26.7%	0.0%	0.0%	50.2%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	16.1%	13.0%	0.0%	13.6%	0.0%	0.0%	0.0%	8.5%
Food/ restaurant variety/ dining options	9.7%	3.9%	66.7%	4.8%	0.0%	100.0%	100.0%	8.5%
Weather	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Would like to experience more local culture	3.2%	3.6%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%
Variety of activities/ attractions	3.2%	1.7%	0.0%	0.0%	46.5%	0.0%	0.0%	0.0%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	3.2%	1.9%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%
Overall customer service/ hospitality/ the people	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%
Better Planning/ more information (signage, maps, research)	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

LIKELIHOOD OF RETURN VISIT - LĀNA'I

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

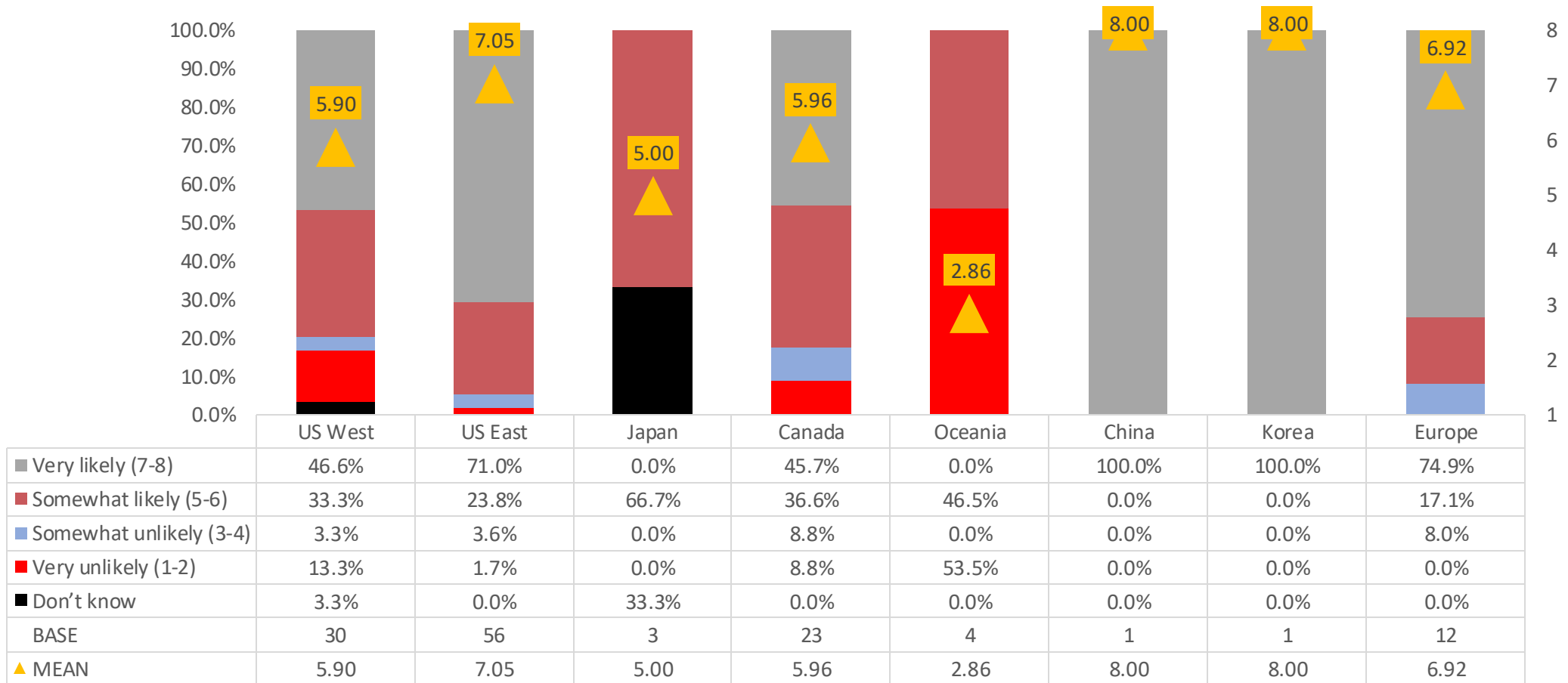


REASONS FOR NOT RETURNING LĀNA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Want to go someplace new	20.0%	46.1%	0.0%	31.0%	0.0%	0.0%	0.0%	42.4%
Too expensive/cost	10.0%	33.1%	0.0%	15.5%	0.0%	0.0%	0.0%	14.4%
No reason to return/ nothing new	20.0%	17.5%	0.0%	15.5%	46.5%	0.0%	0.0%	28.8%
Nothing to do/ boring	20.0%	8.4%	0.0%	8.5%	26.7%	0.0%	0.0%	0.0%
Not enough value for the price	20.0%	3.9%	0.0%	0.0%	26.7%	0.0%	0.0%	0.0%
Poor health/ age restriction	20.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	14.4%
Other (please specify)	10.0%	3.9%	0.0%	14.0%	26.7%	0.0%	0.0%	0.0%
Flight too long	0.0%	8.4%	0.0%	21.0%	0.0%	0.0%	0.0%	28.8%
Unfriendly people/ felt unwelcome	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Poor service	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other financial obligations	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	14.4%
Politics/ Trump/ Immigration	0.0%	0.0%	0.0%	8.5%	0.0%	0.0%	0.0%	0.0%

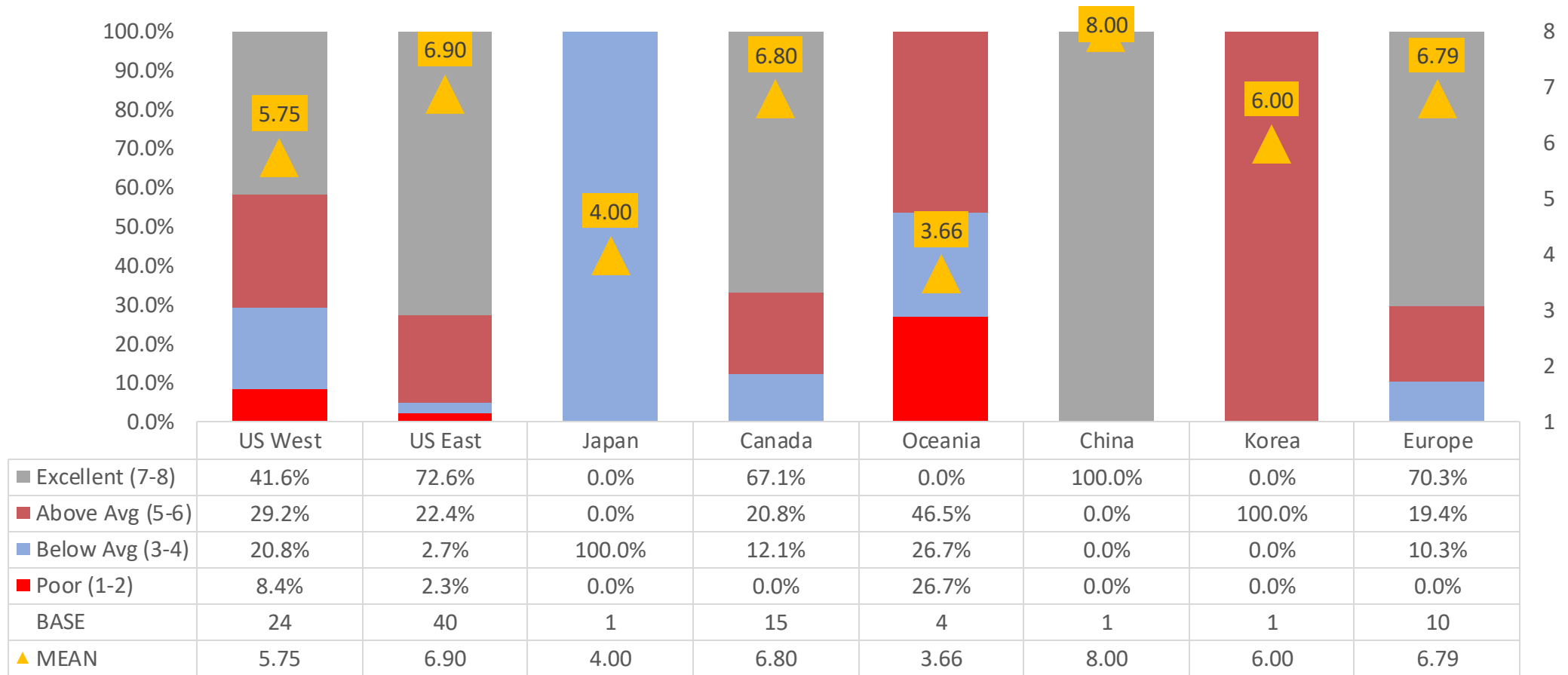
BRAND/ DESTINATION ADVOCACY - LĀNA'I

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



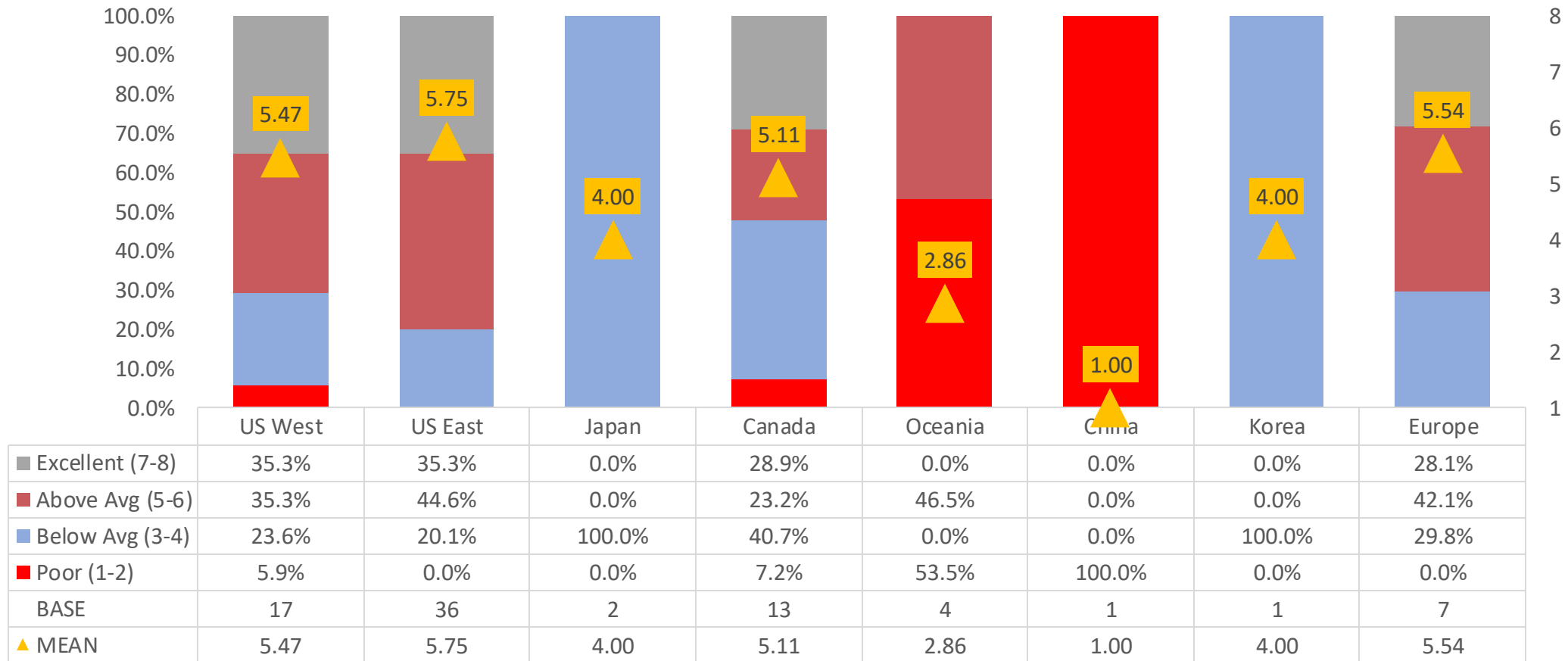
ENTERTAINMENT/ ATTRACTIONS - LĀNA'I

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



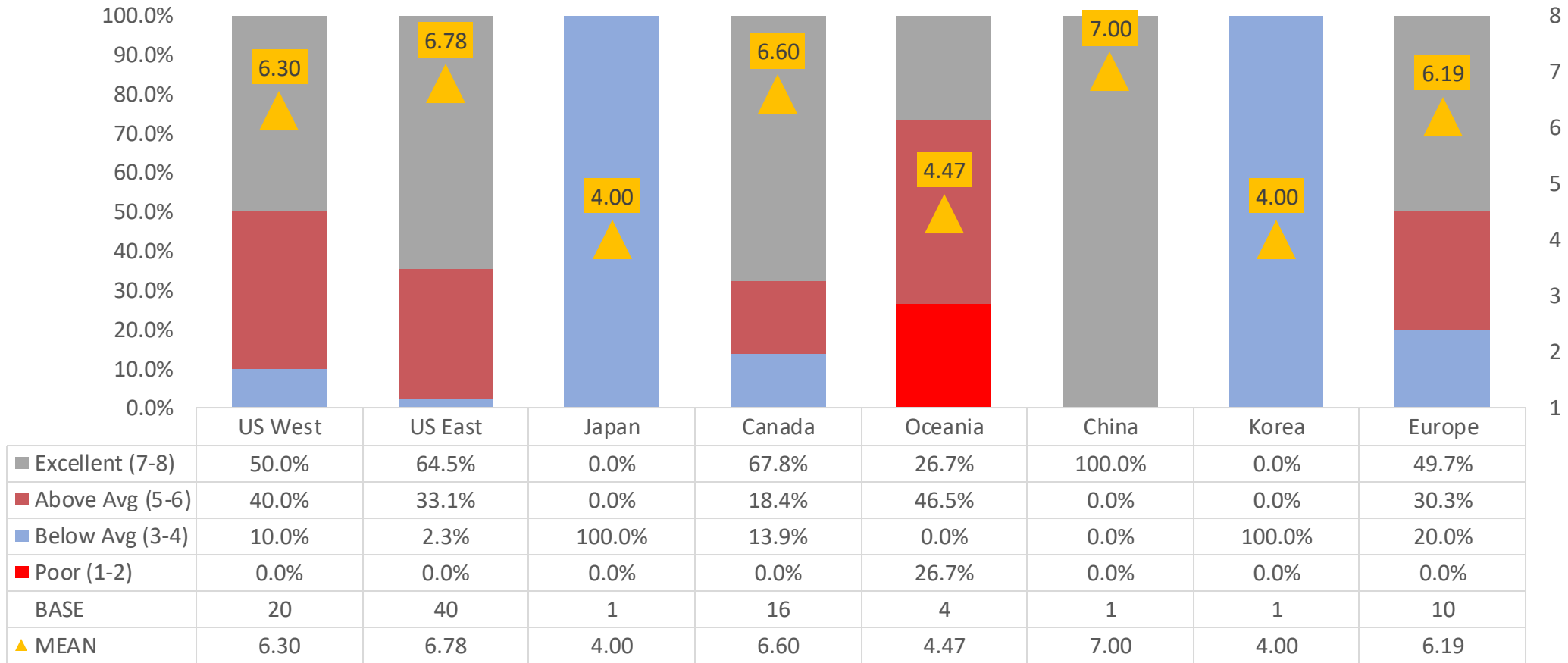
SHOPPING - LĀNA'I

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



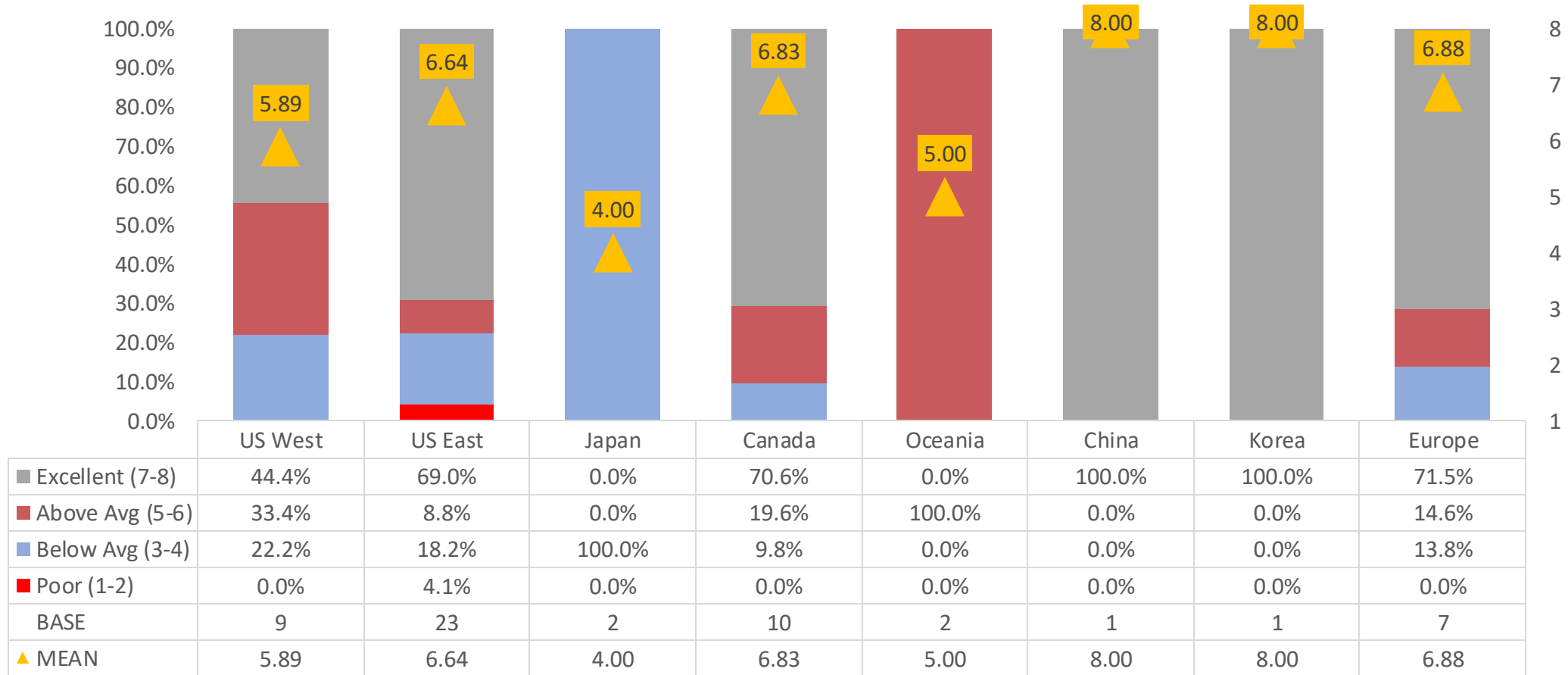
DINING/ FOOD & BEVERAGE - LĀNA'I

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



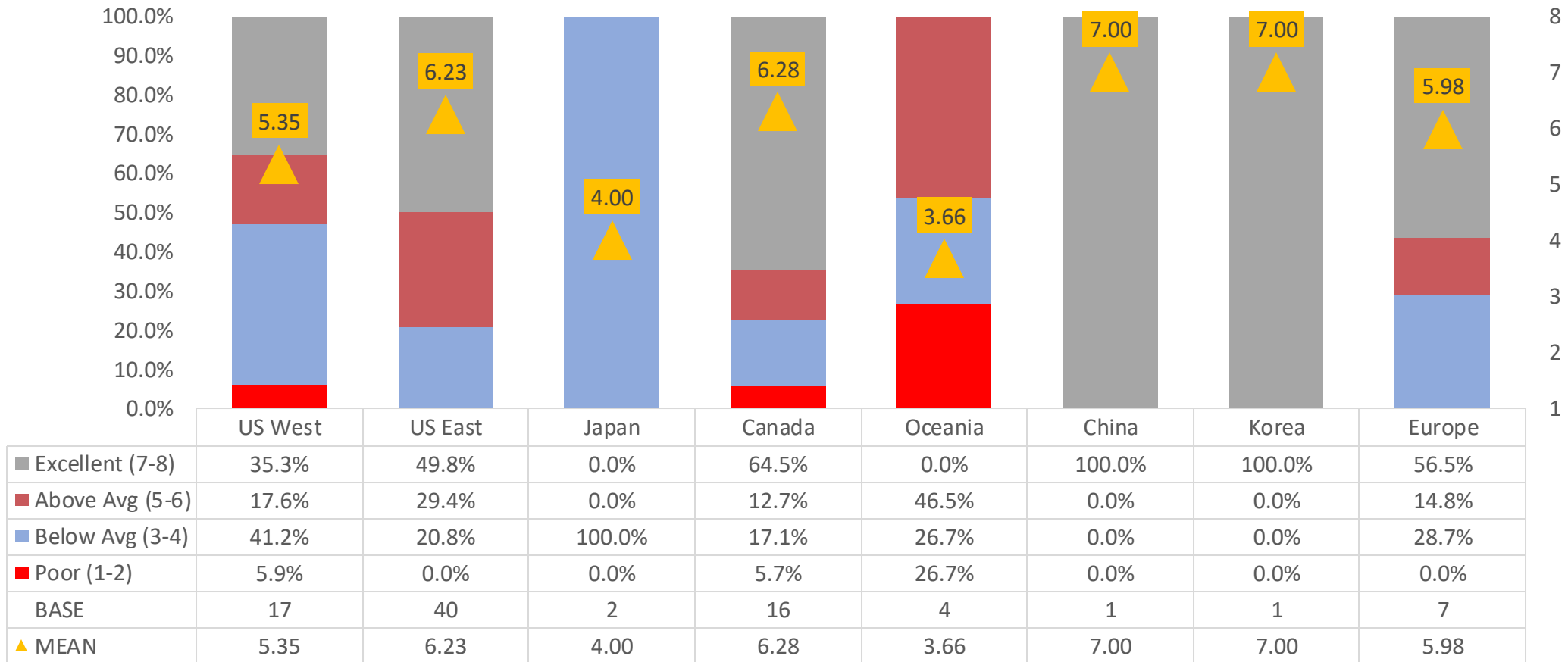
LODGING/ ACCOMMODATIONS - LĀNA'I

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



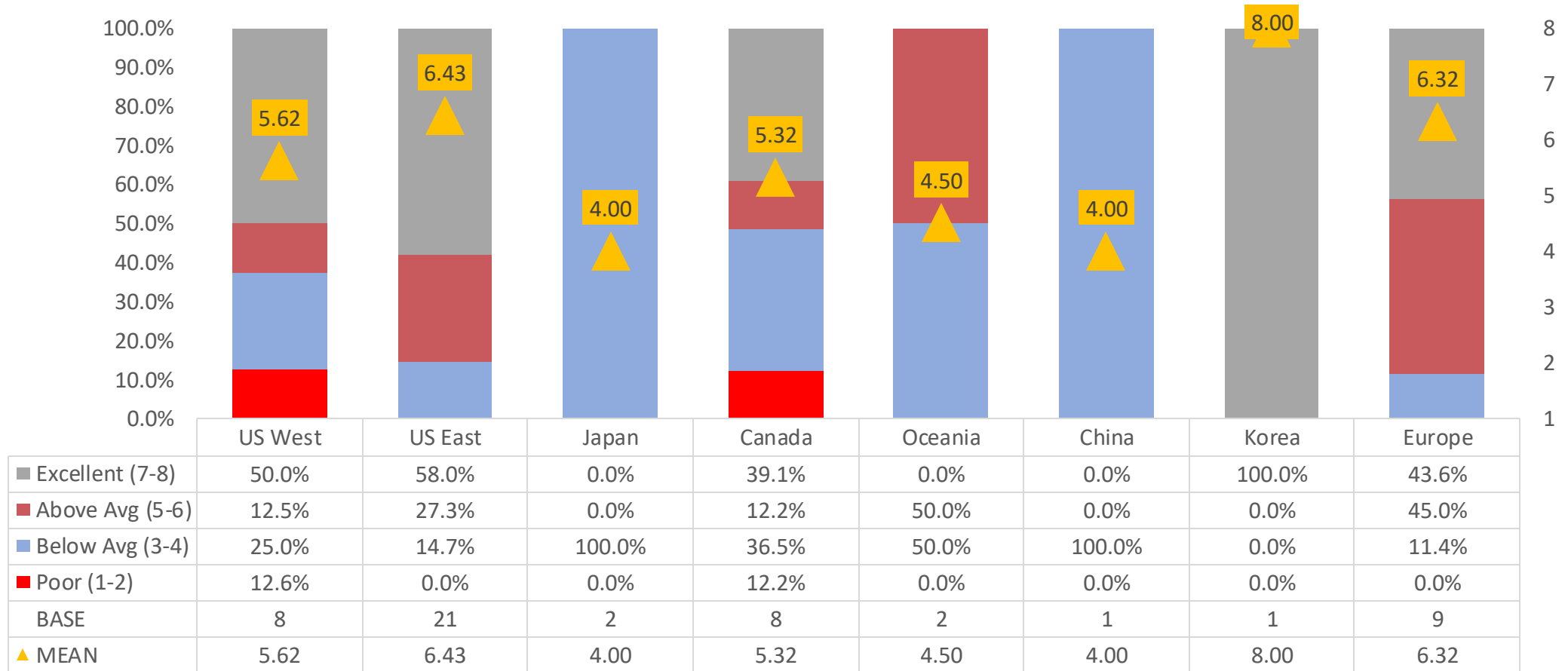
TRANSPORTATION ON ISLAND - LĀNA'I

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



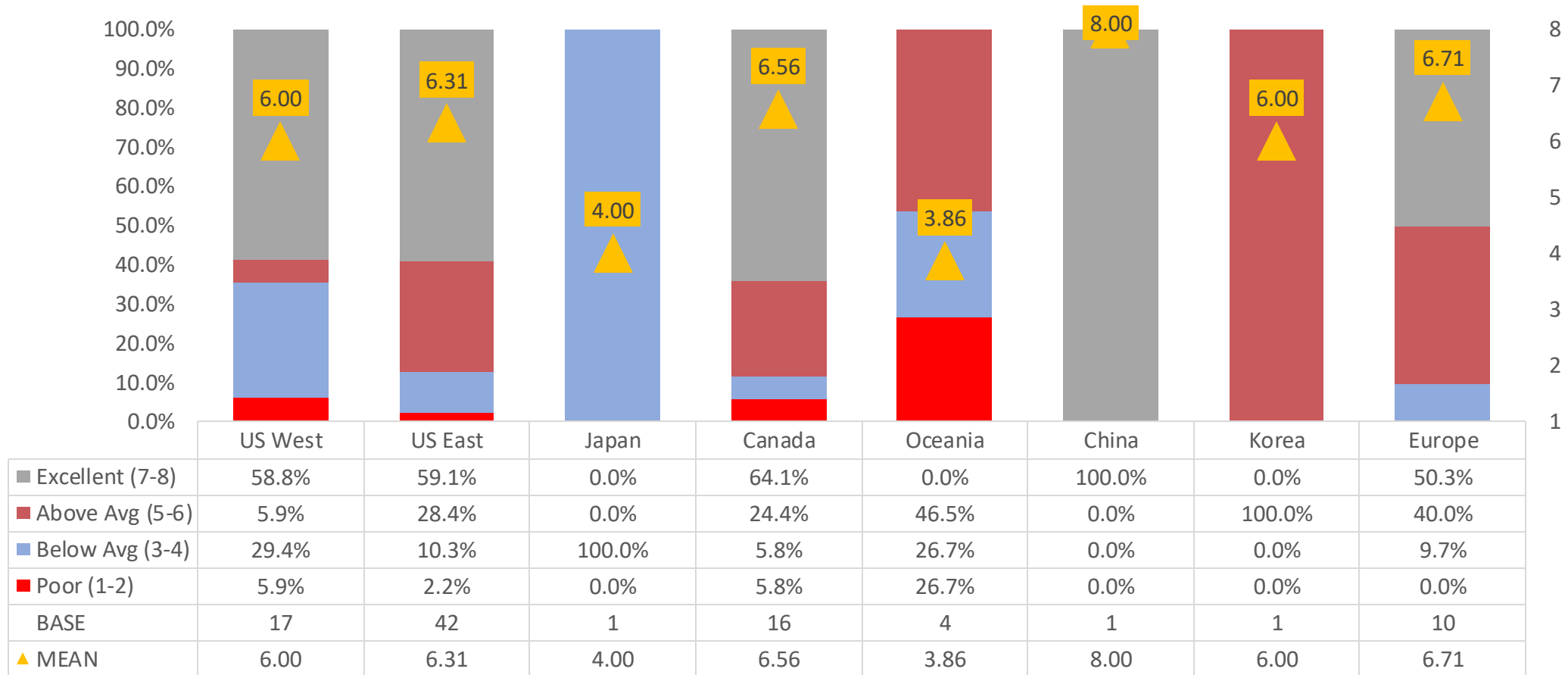
AIRPORT - LĀNA'I

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



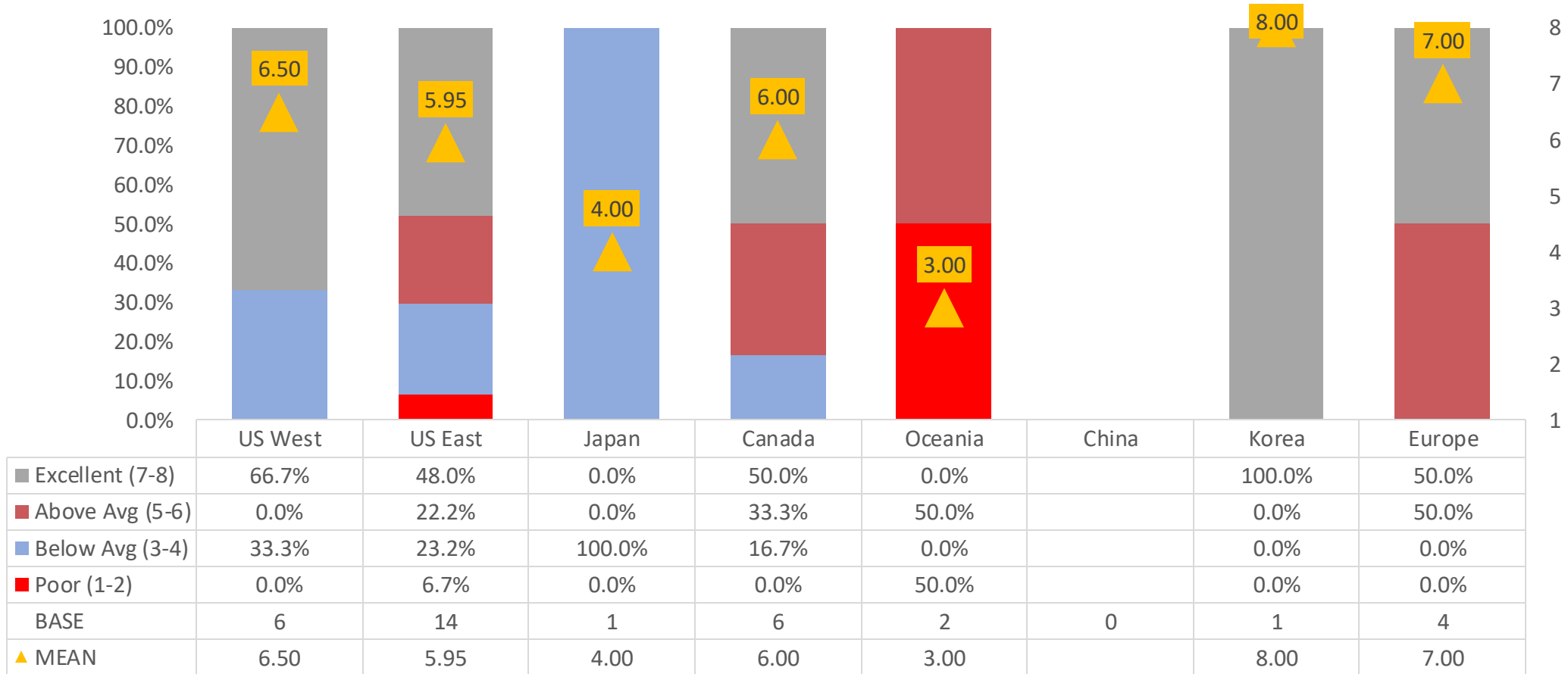
CULTURAL EXPERIENCES - LĀNA'I

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



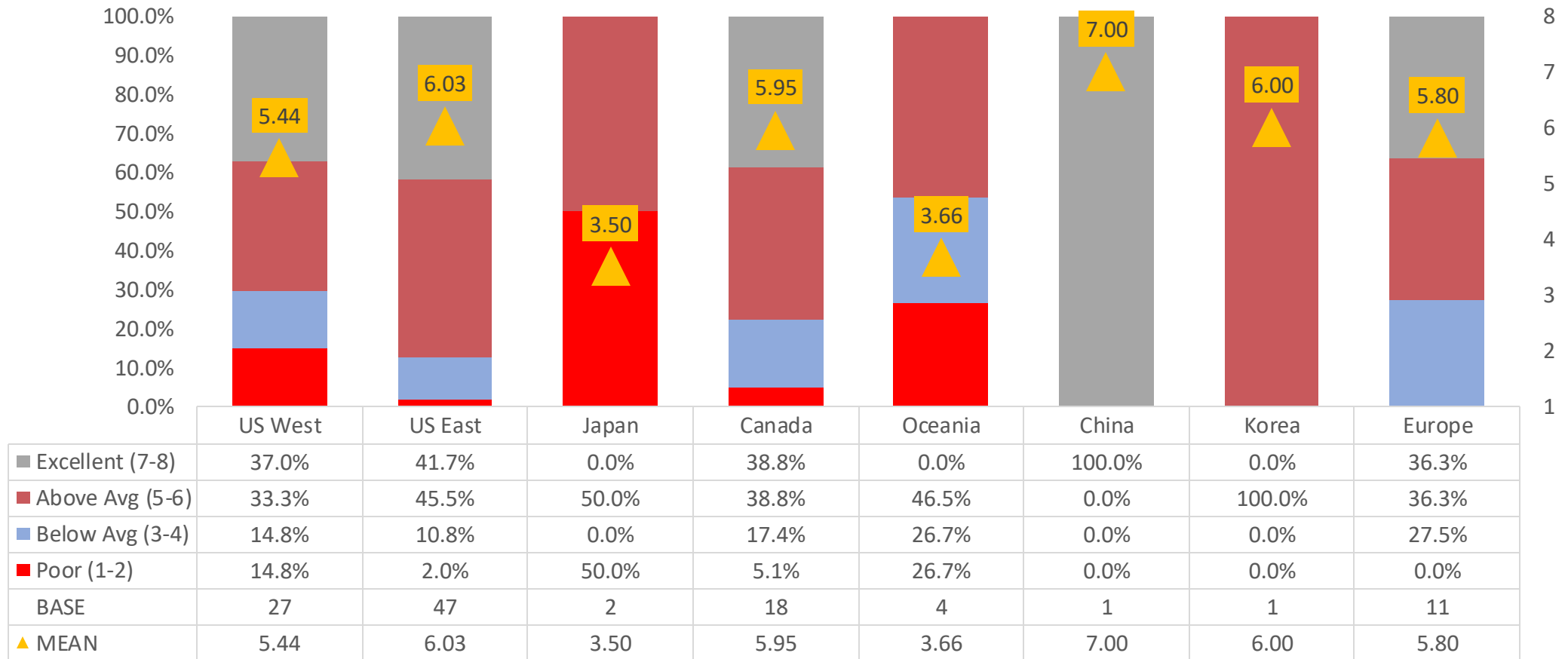
VOLUNTEER EXPERIENCES - LĀNA'I

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



VALUE FOR THE MONEY - LĀNA'I

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



LĀNA'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.5%	97.9%	66.7%	100.0%	100.0%	0.0%	100.0%	100.0%
On own (self-guided)/ driving around the island	37.9%	34.5%	33.3%	42.6%	26.7%	0.0%	0.0%	35.7%
Helicopter ride/ airplane tour	3.4%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Boat tour/ submarine ride/ whale watching	27.6%	22.1%	0.0%	34.9%	0.0%	0.0%	0.0%	27.5%
Visiting towns/ communities	31.0%	31.9%	66.7%	38.3%	19.8%	0.0%	0.0%	18.1%
Private limousine/ van tour/ tour bus	10.3%	24.4%	0.0%	24.4%	53.5%	0.0%	0.0%	9.3%
Scenic views/ natural landmarks	34.5%	61.9%	0.0%	29.6%	0.0%	0.0%	100.0%	54.9%
Movie and TV filming location tours	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%

LĀNA'I ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	86.2%	90.5%	100.0%	100.0%	46.5%	0.0%	100.0%	91.2%
Beach/ sunbathing	51.7%	52.2%	0.0%	87.0%	0.0%	0.0%	100.0%	81.9%
Bodyboarding	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stand-up paddle boarding	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%
Surfing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%
Canoe paddling	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kayaking	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%
Swimming in the ocean	44.8%	28.8%	0.0%	59.3%	19.8%	0.0%	100.0%	18.1%
Snorkeling	48.3%	27.6%	0.0%	30.6%	0.0%	0.0%	100.0%	54.9%
Freediving	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Windsurfing/ kitesurfing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Jet skiing/ parasailing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Scuba diving	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fishing	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Golf	0.0%	6.3%	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%

LĀNA'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	86.2%	90.5%	100.0%	100.0%	46.5%	0.0%	100.0%	91.2%
Running/ jogging/ fitness walking	3.4%	12.1%	0.0%	13.0%	26.7%	0.0%	100.0%	0.0%
Cycling	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Spa	3.4%	10.3%	0.0%	5.2%	0.0%	0.0%	100.0%	0.0%
Hiking	27.6%	31.9%	0.0%	9.6%	0.0%	0.0%	0.0%	26.9%
Backpacking/ camping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Agritourism	6.9%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sports event or tournament	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Parks/ botanical gardens	6.9%	25.5%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%
Waterparks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mountain tubing/ waterfall rappel	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zip-lining	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Skydiving	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All-terrain vehicle (ATV)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Horseback riding	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%

LĀNA'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	82.7%	89.0%	66.7%	87.0%	46.5%	0.0%	100.0%	81.9%
Lunch/ sunset/ dinner/ evening cruise	37.9%	22.4%	0.0%	44.4%	0.0%	0.0%	0.0%	17.6%
Live music/ stage show	0.0%	7.6%	0.0%	18.2%	0.0%	0.0%	0.0%	27.5%
Nightclub/ dancing/ bar/ karaoke	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fine dining	13.8%	14.0%	0.0%	9.6%	0.0%	0.0%	100.0%	18.7%
Family restaurant	24.1%	22.7%	0.0%	34.0%	0.0%	0.0%	0.0%	18.1%
Fast food	0.0%	7.3%	0.0%	8.6%	19.8%	0.0%	0.0%	9.3%
Food truck	0.0%	12.1%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%
Café/ coffee house	17.2%	24.0%	33.3%	9.6%	46.5%	0.0%	0.0%	27.5%
Ethnic dining	0.0%	7.9%	0.0%	9.6%	0.0%	0.0%	0.0%	0.0%
Farm-to-table cuisine	13.8%	11.6%	33.3%	5.2%	0.0%	0.0%	0.0%	0.0%
Prepared own meal	10.3%	10.3%	0.0%	5.2%	0.0%	0.0%	0.0%	8.8%

LĀNA'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	48.3%	69.2%	66.7%	60.8%	46.5%	0.0%	0.0%	63.7%
Malls/ department stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Designer boutiques	13.8%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%
Hotel/ resort stores	10.3%	16.1%	0.0%	4.3%	0.0%	0.0%	0.0%	9.3%
Swap meet/ flea market	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Discount/ outlet stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Supermarkets	10.3%	12.4%	33.3%	9.6%	0.0%	0.0%	0.0%	18.1%
Farmer's market	3.4%	13.4%	0.0%	8.6%	0.0%	0.0%	0.0%	0.0%
Convenience stores	13.8%	15.5%	0.0%	18.2%	26.7%	0.0%	0.0%	18.1%
Duty-free stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hawai'i-based products	17.2%	23.1%	0.0%	17.3%	19.8%	0.0%	0.0%	0.0%
Local shops and artisans	37.9%	36.7%	33.3%	33.0%	19.8%	0.0%	0.0%	26.9%
Local fashion designers	10.3%	0.0%	0.0%	5.2%	0.0%	0.0%	0.0%	9.3%

LĀNA'I ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	34.5%	51.1%	33.3%	52.2%	19.8%	0.0%	0.0%	54.9%
Historic military sites and museums	3.4%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Historic Hawaiian sites and museums	20.7%	27.4%	0.0%	32.1%	0.0%	0.0%	0.0%	9.3%
Other historical sites, museums, and homes	6.9%	10.3%	33.3%	0.0%	19.8%	0.0%	0.0%	8.8%
Art museum	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Art galleries/ exhibitions	6.9%	12.1%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%
Lū'au/ Polynesian show/ hula show	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lesson- e.g. ukulele, hula, canoe, lei making	0.0%	5.5%	0.0%	4.3%	0.0%	0.0%	0.0%	9.3%
Play/ concert/ theatre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Art/ craft fair	0.0%	3.9%	0.0%	4.3%	0.0%	0.0%	0.0%	9.3%
Festival/ event	3.4%	2.1%	0.0%	15.7%	0.0%	0.0%	0.0%	18.1%

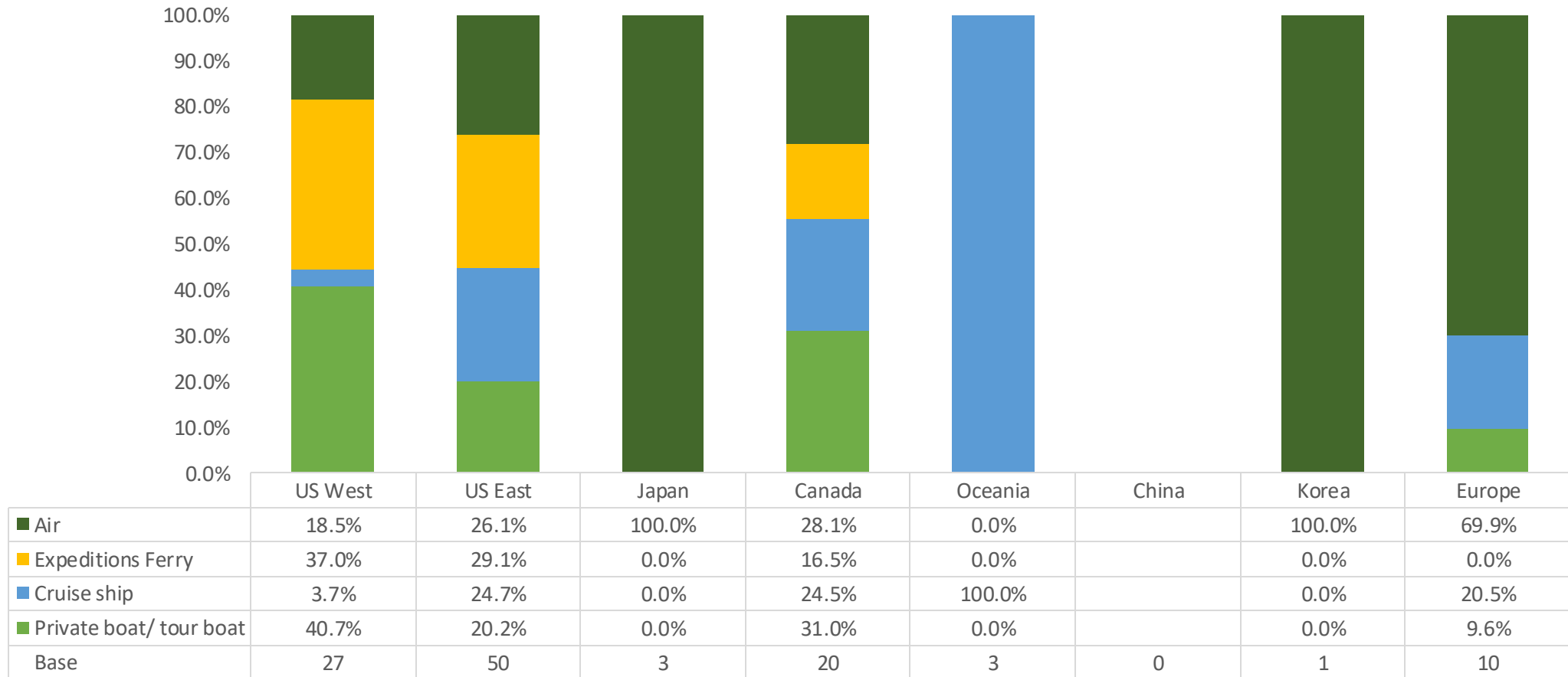
LĀNA'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	41.4%	68.4%	66.7%	67.0%	46.5%	0.0%	100.0%	73.6%
Airport shuttle	6.9%	16.1%	0.0%	4.3%	0.0%	0.0%	100.0%	36.3%
Trolley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Public bus	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tour bus/ tour van	3.4%	22.9%	0.0%	24.4%	46.5%	0.0%	0.0%	9.3%
Taxi/ limo	10.4%	6.1%	0.0%	14.8%	0.0%	0.0%	0.0%	9.3%
Rental car	17.2%	24.3%	66.7%	27.8%	0.0%	0.0%	0.0%	8.8%
Ride share	3.4%	7.6%	0.0%	9.6%	0.0%	0.0%	0.0%	18.7%
Car share	0.0%	3.9%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%
Bicycle rental	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

LĀNA'I ACTIVITIES - OTHER

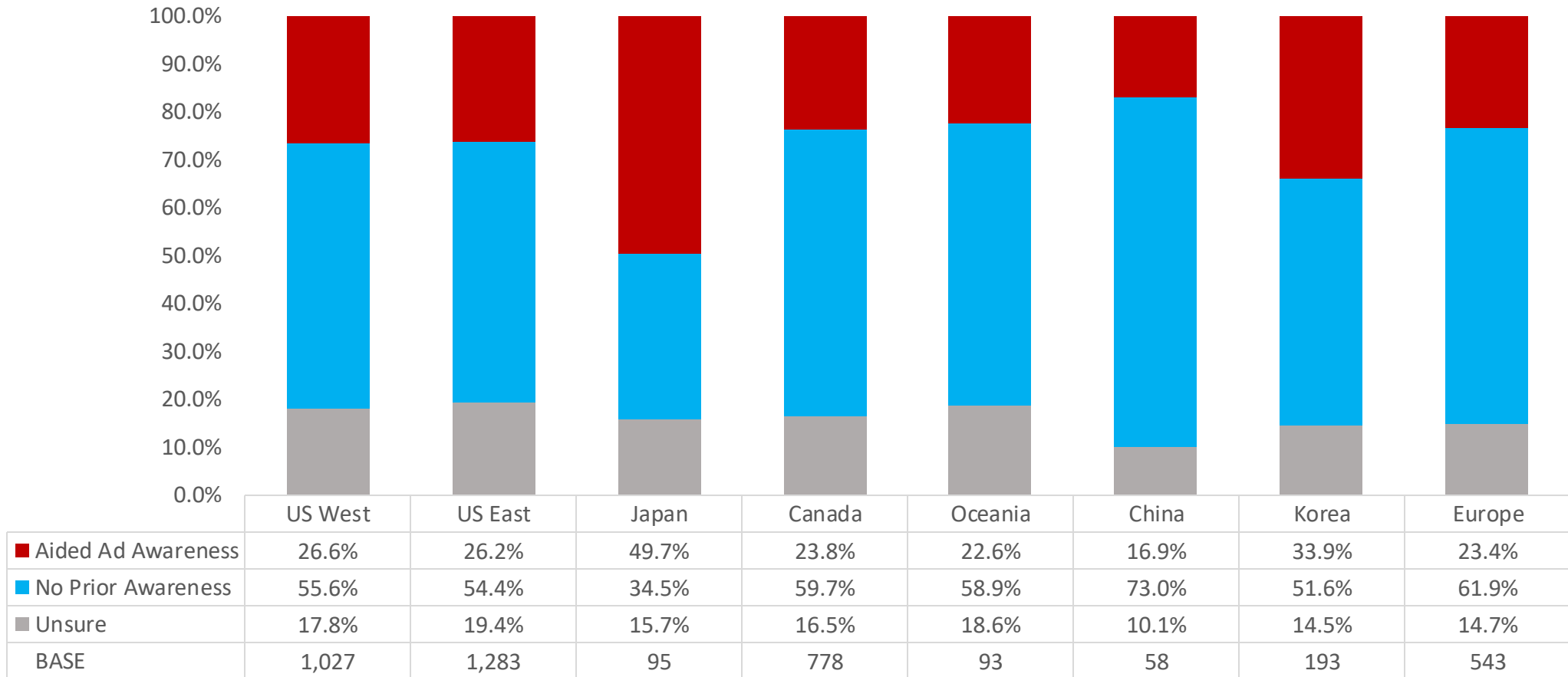
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	10.3%	9.7%	0.0%	9.6%	0.0%	0.0%	0.0%	18.1%
Visiting friends/ relatives	6.9%	7.9%	0.0%	9.6%	0.0%	0.0%	0.0%	18.1%
Giving back to the local community	3.4%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

TRANSPORTATION TO LĀNA'I



Section 26 – Island of Hawai'i

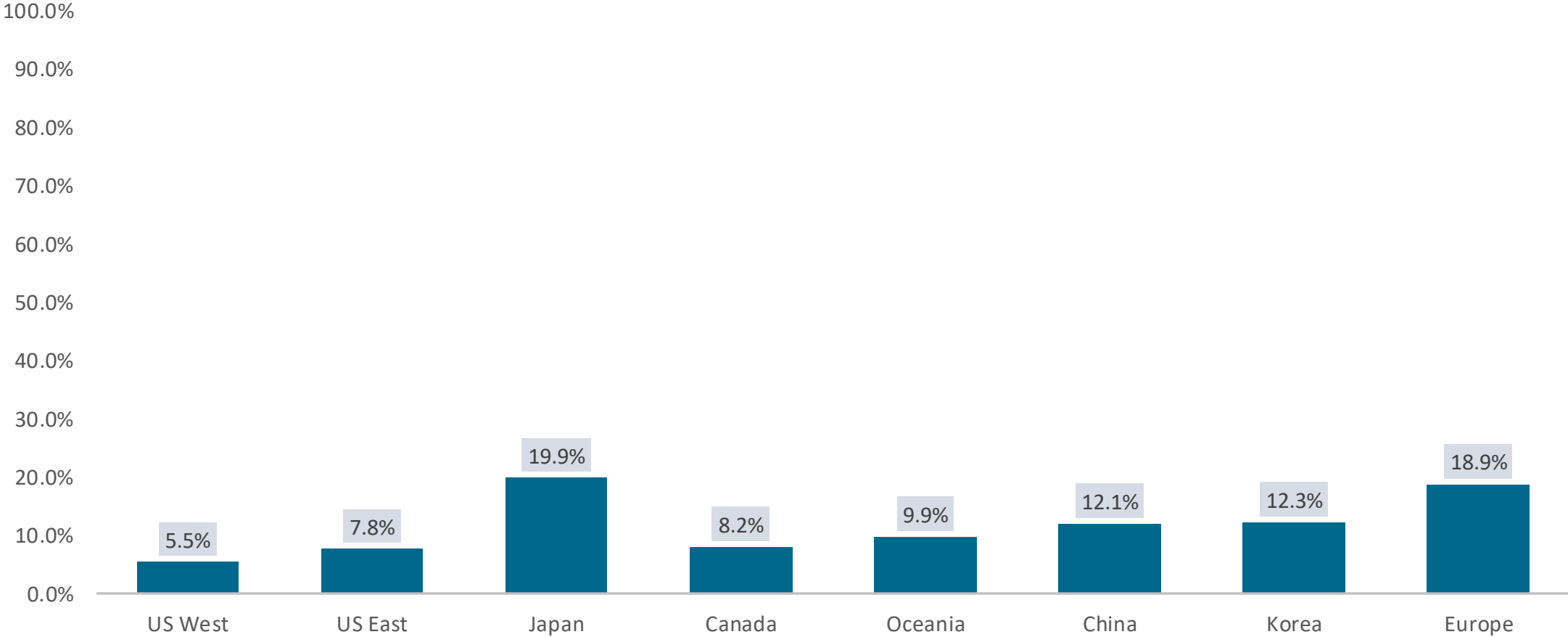
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



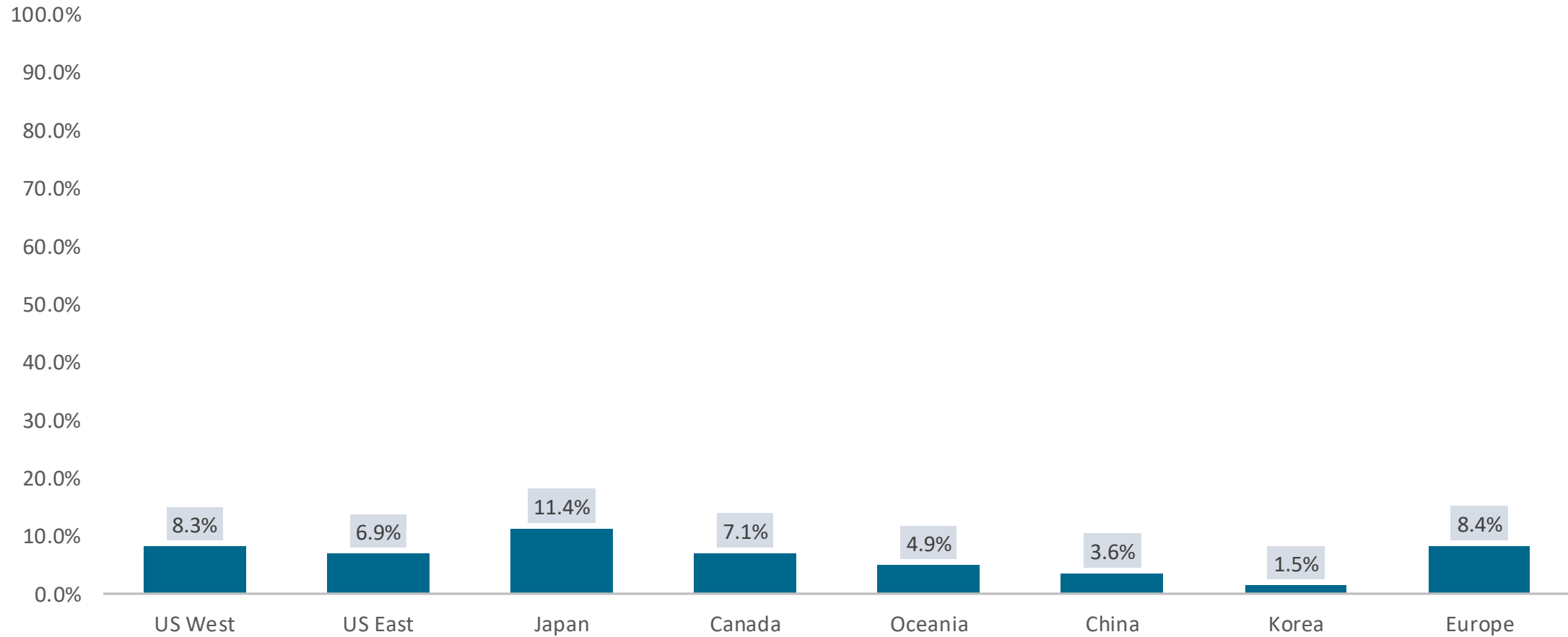
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I

- **Gender:** Male visitors from **U.S. West** were more likely to recall advertising for the Island of Hawai'i than females from this visitor market.
- **Trips to Hawai'i:** Repeat visitors from **U.S. West** were more likely to recall advertising for the Island of Hawai'i than first-time visitors from this market.
- **Household income:** Aided advertising awareness was highest among visitors from **U.S. West** with household income in the bottom tier (<\$100K). Advertising awareness declined as they became more affluent.
- **Education:** Visitors from **U.S. West** without a college degree were more likely to recall advertising than travelers from this visitor market with a college degree.
- **Islands visited:** Visitors from **U.S. West** and **U.S. East** whose trip included stays on multiple islands were more likely to recall advertising from the Island of Hawai'i than visitors whose trip was spent entirely on the Island of Hawai'i.

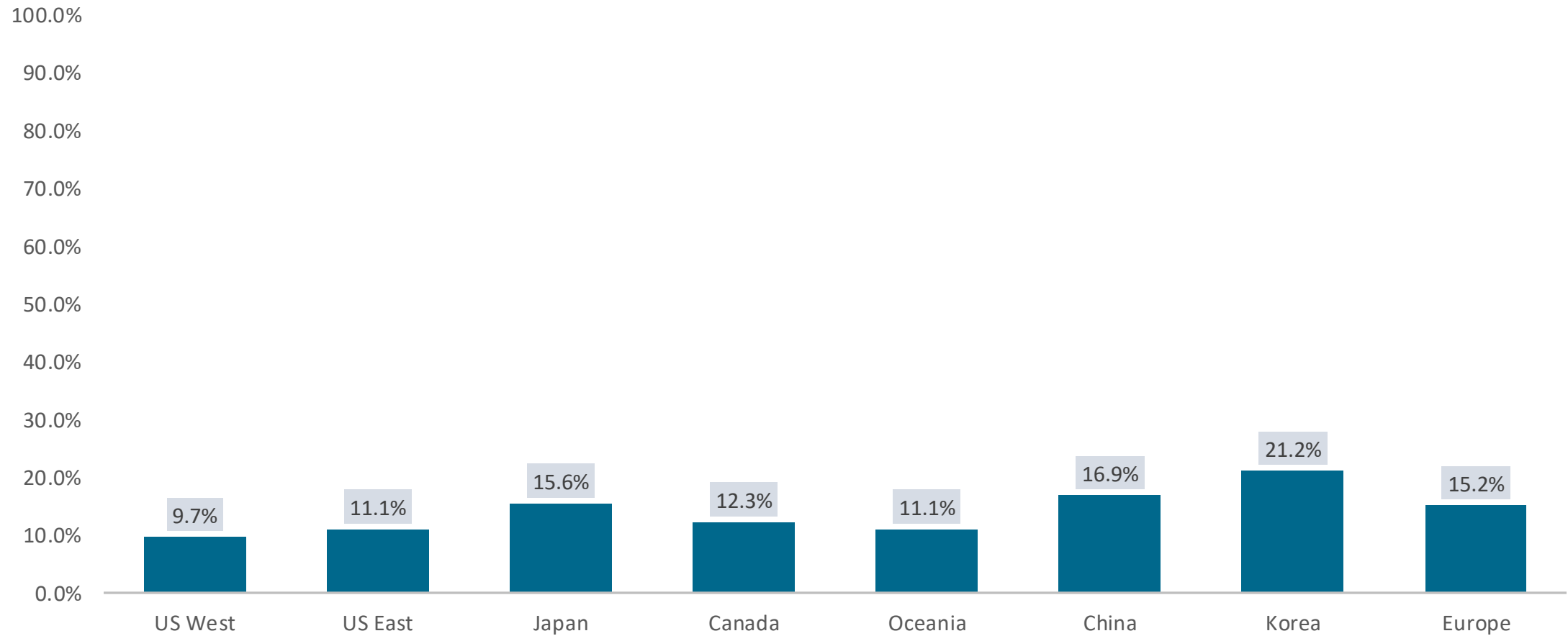
IMPACT OF LOCATION FILMING - ISLAND OF HAWAI'I



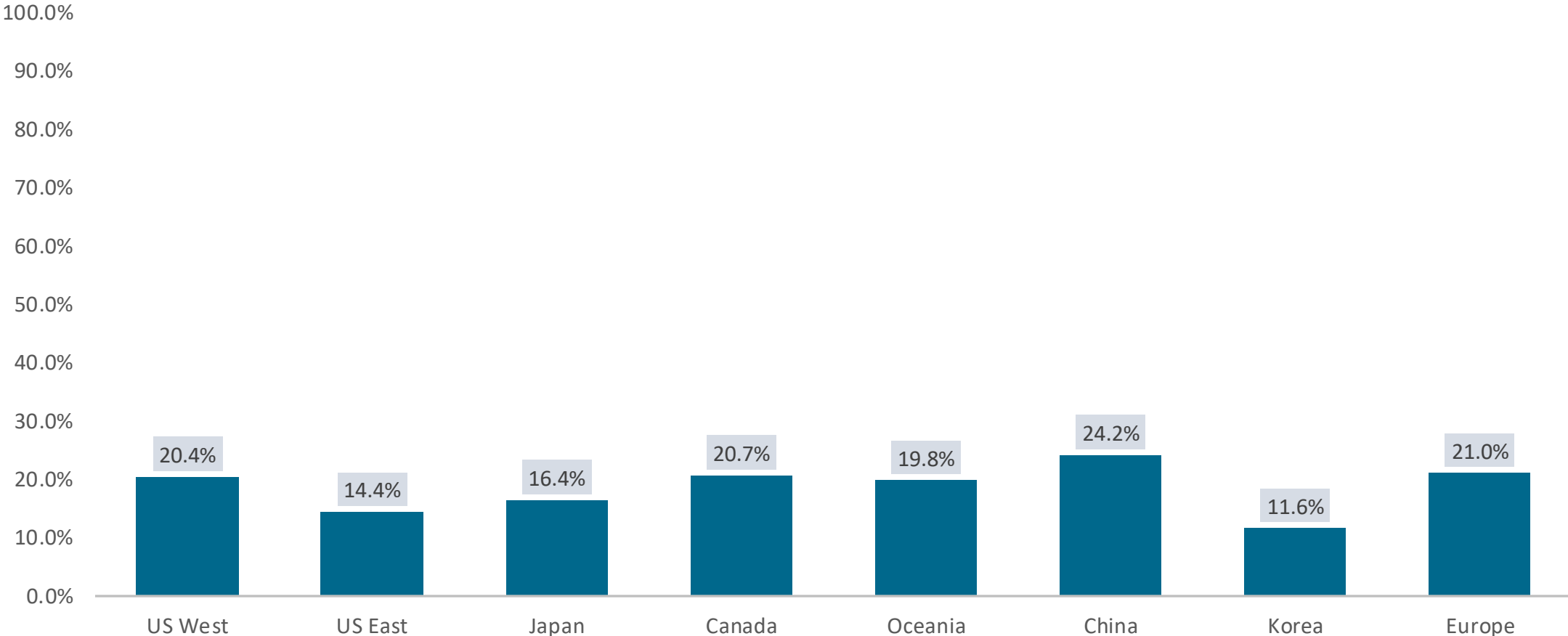
IMPACT OF HAWAIIAN MUSIC - ISLAND OF HAWAI'I



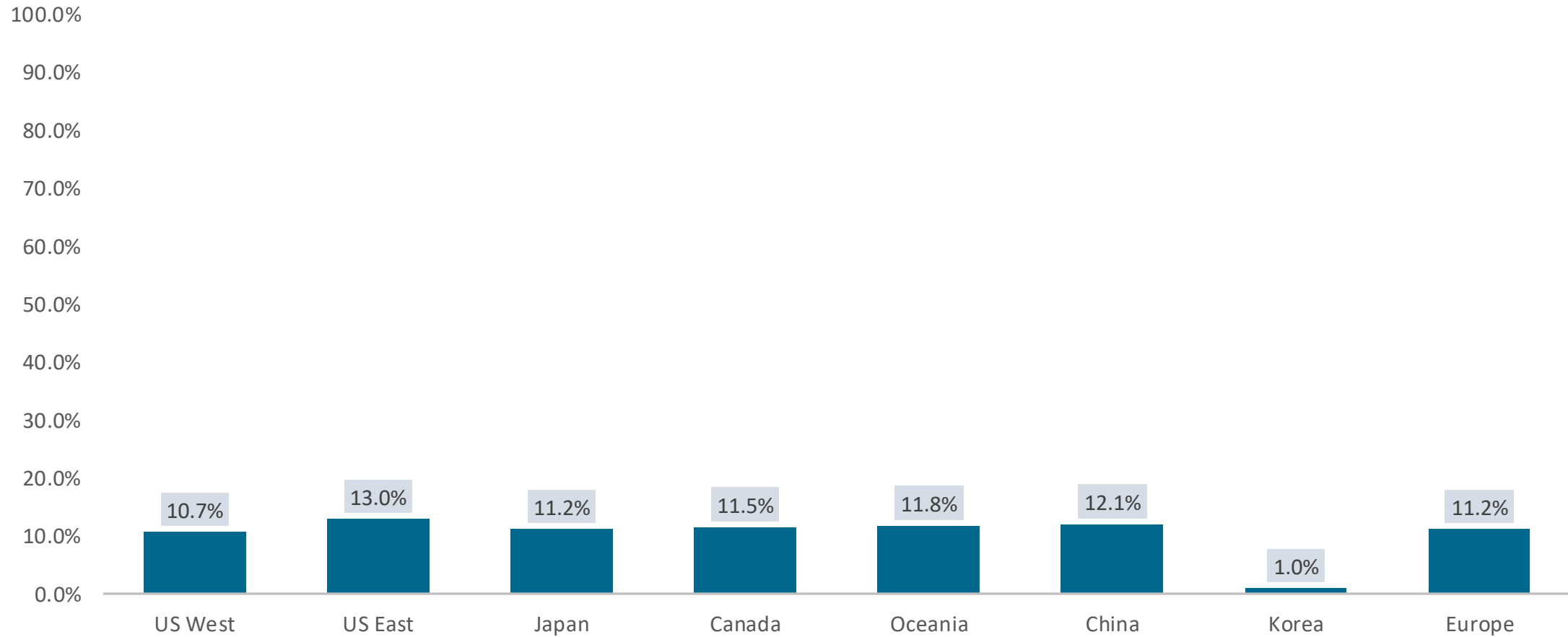
IMPACT OF SOCIAL MEDIA POSTS/VIDEOS - ISLAND OF HAWAI'I



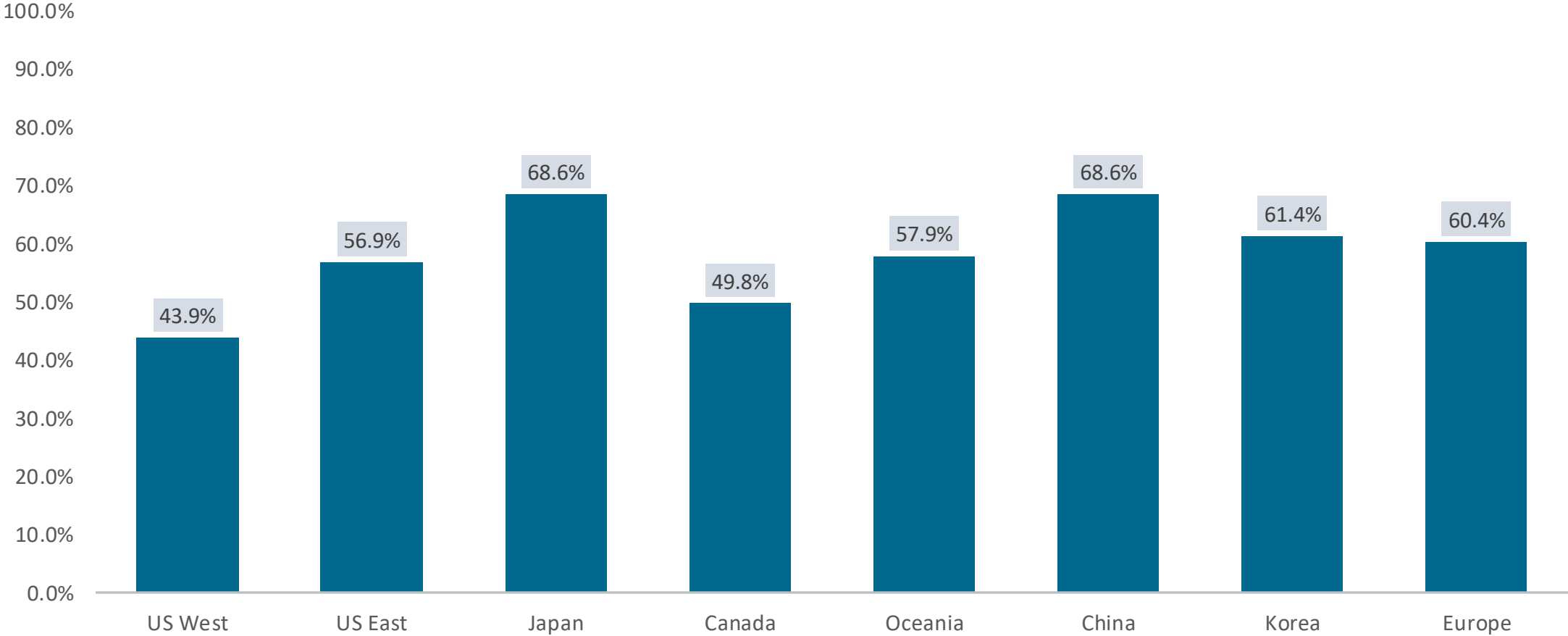
IMPACT OF OUTDOOR/ SPORTING ACTIVITIES/ EVENTS - ISLAND OF HAWAI'I



IMPACT OF HAWAIIAN CULTURAL EVENTS - ISLAND OF HAWAI'I



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



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



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

- **Age:** Amongst visitors from **U.S. West** and **U.S. East**, the average number of trips to the Island of Hawai'i increased as they got older.
- **Household income:** The number of trips to the Island of Hawai'i was highest among more affluent respondents or those with household income in the upper tier (\$150K+) from **U.S. West**.
- **Gender:** Male visitors from **U.S. East** had visited the Island of Hawai'i more often in the past than females from this visitor market.
- **Islands visited:** Visitors from **U.S. East** whose trip was spent entirely on the Island of Hawai'i had visited the island more often than those who included stops on multiple islands.
- **Travel party size:** Among U.S. East visitors, those who came alone had visited Hawai'i Island more often than those who traveled here with at least one other individual.

STRENGTHS/ POSITIVE ASPECTS - ISLAND OF HAWAI'I

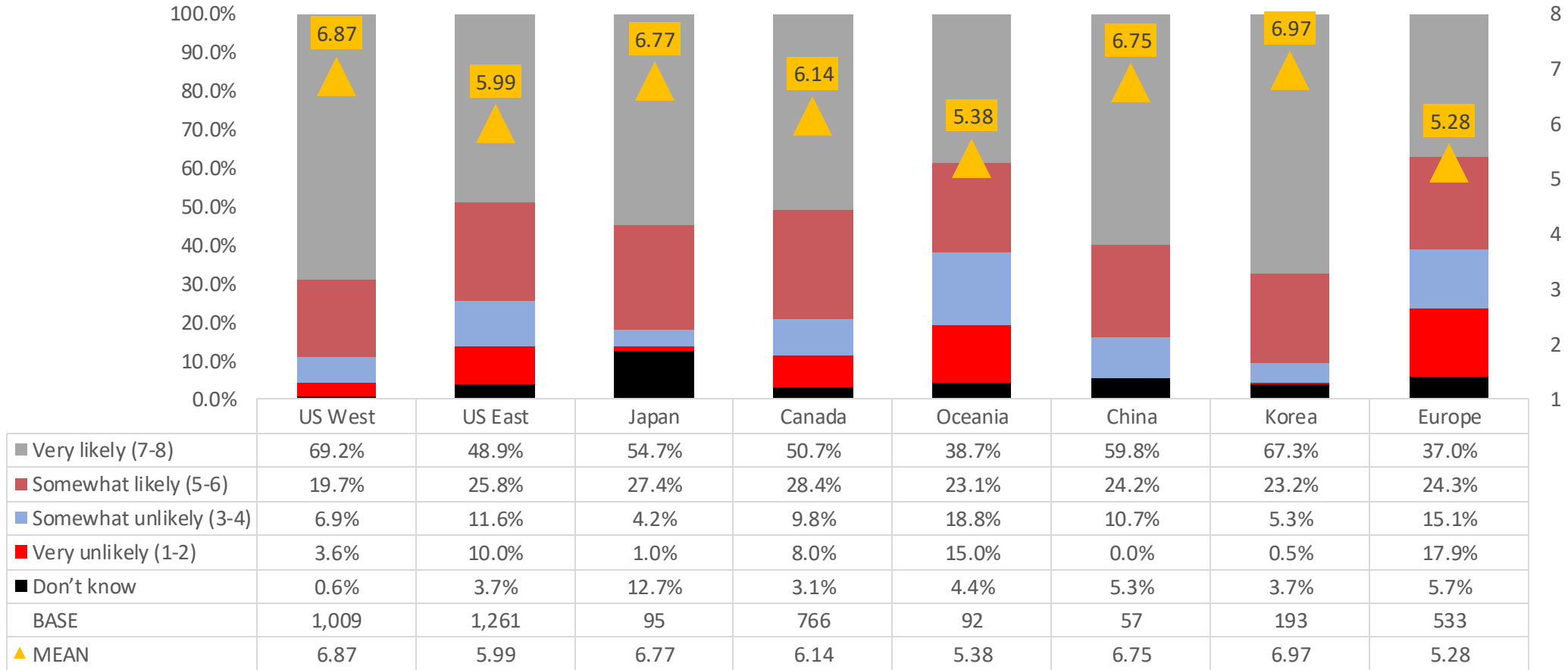
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Nature/ natural beauty/ scenery	20.0%	26.8%	41.3%	24.8%	32.5%	31.0%	31.2%	35.7%
Variety of activities/ attractions/ many choices	17.3%	20.2%	11.7%	19.6%	12.2%	17.3%	28.5%	14.4%
Beach/ ocean	16.0%	10.0%	9.5%	12.2%	8.1%	15.3%	12.8%	8.5%
Feeling of the "Aloha Spirit"	8.6%	9.5%	3.0%	10.4%	8.8%	10.5%	3.0%	14.3%
Friendliness of the local people	7.0%	6.1%	4.3%	7.9%	8.8%	2.0%	5.4%	8.5%
Events/ celebrations with friends/ family	6.5%	6.1%	0.0%	2.5%	4.0%	0.0%	1.5%	1.8%
Accommodations/ was as promised	4.3%	3.4%	12.5%	4.2%	0.0%	0.0%	1.0%	2.4%
Local culture/ people/ music	3.3%	2.6%	2.0%	2.3%	4.0%	1.6%	3.6%	1.3%

AREAS OF OPPORTUNITIES - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
No negatives/ everything was great	41.9%	44.5%	34.9%	39.1%	50.3%	30.2%	28.5%	38.8%
Food/ restaurant variety/ dining options	6.6%	6.0%	6.0%	6.3%	3.4%	12.1%	14.2%	8.0%
Traffic (congested/slow)	6.0%	6.3%	0.0%	5.9%	1.9%	6.9%	2.0%	4.5%
Would like to experience more local culture	5.2%	6.3%	3.2%	7.2%	6.6%	0.0%	6.4%	6.8%
Availability of ground transportation/ tour busses/ limos, availability of taxi cabs, ride share options, etc.	4.3%	3.8%	25.8%	5.4%	10.7%	6.9%	8.0%	9.6%
Cost/Expensive (specific/non-specific)	4.9%	4.7%	1.0%	6.6%	4.0%	3.6%	6.3%	6.0%
Rental car experience (long waits in line, condition of rental car, bad check in or out service/ rental car company service)	5.5%	3.8%	4.2%	4.7%	5.0%	2.0%	3.7%	2.8%
Food/ restaurant quality	3.6%	2.8%	4.2%	2.3%	0.9%	8.1%	11.2%	5.6%

LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

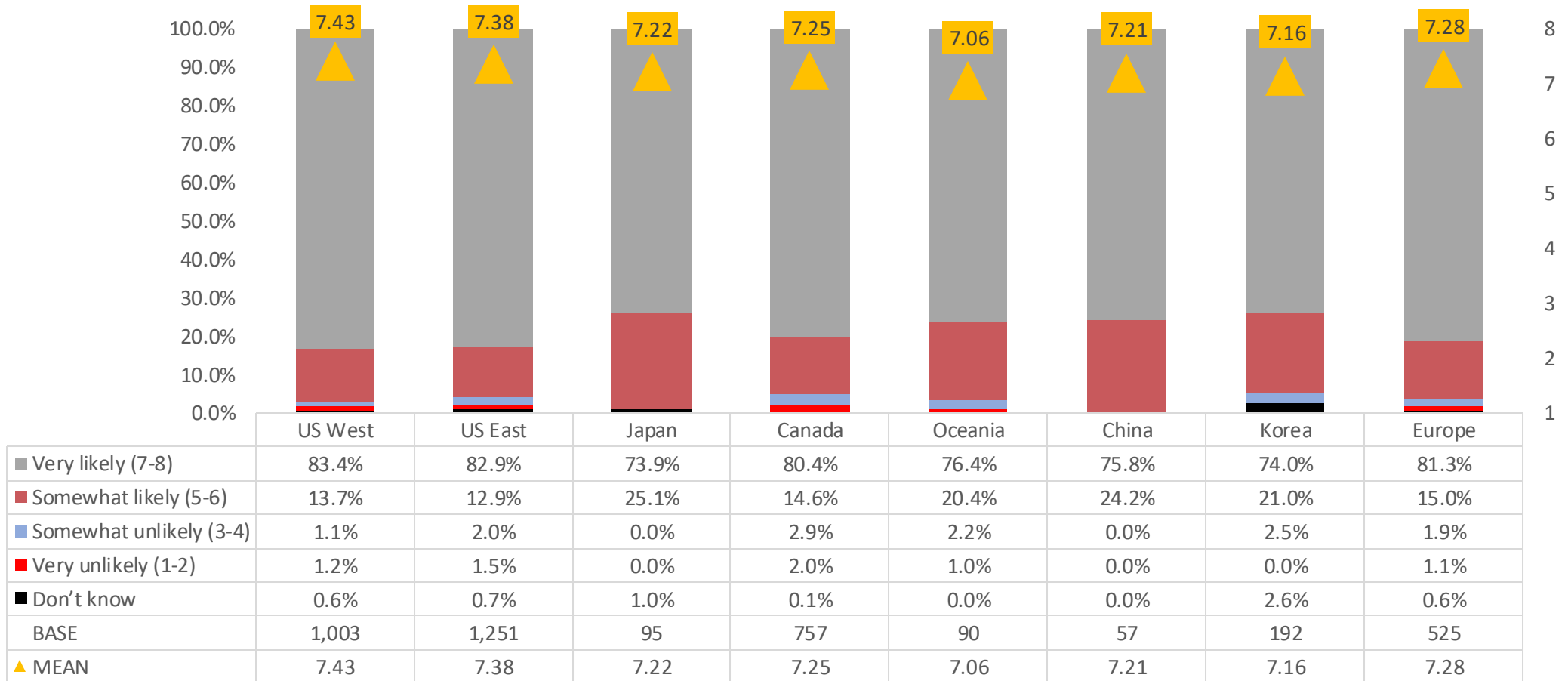
- **Education:** Visitors from **U.S. West** and **U.S. East** without a college degree expressed a stronger likelihood to return to the Island of Hawai'i in the next five years compared to those with a college degree from these visitor market.
- **Islands visited:** **U.S. West** and **U.S. East** visitors whose stay was limited to just the Island of Hawai'i expressed a stronger likelihood to return in the next five years compared to those whose stay included stops on multiple islands.
- **Travel party size:** Visitors from **U.S. West** and **U.S. East** who traveled alone were more likely to return to the Island of Hawai'i than those who came in a larger travel party (3+ individuals).
- **Age:** Visitors from **U.S. West** between the ages of 50 and 64 were the most likely to indicate a possible return in the next five years compared to other age groups from this visitor market.

REASONS FOR NOT RETURNING - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Want to go someplace new	55.9%	52.5%	35.5%	48.4%	60.9%	64.2%	35.0%	39.0%
Too expensive/cost	19.8%	40.0%	29.9%	40.8%	23.4%	23.0%	42.9%	50.3%
Flight too long	8.1%	33.7%	0.0%	21.4%	6.1%	43.6%	16.9%	62.1%
No reason to return/ nothing new	12.6%	12.4%	11.3%	10.5%	18.3%	10.3%	0.0%	10.9%
Not enough value for the price	7.2%	10.0%	0.0%	14.1%	14.8%	20.6%	10.4%	7.8%
Other financial obligations	3.6%	9.9%	12.1%	8.5%	6.1%	0.0%	15.6%	10.4%
Poor health/ age restriction	4.5%	6.9%	5.6%	2.7%	0.0%	0.0%	6.5%	3.8%
Inconvenient travel connections (long layovers, couldn't get the flight we wanted)	2.7%	2.6%	5.6%	6.6%	3.5%	10.3%	5.2%	3.4%
Nothing to do/ boring	4.5%	2.2%	0.0%	3.8%	2.6%	0.0%	10.4%	0.0%
Too crowded/ congested/ traffic	2.7%	2.8%	0.0%	1.1%	0.0%	0.0%	0.0%	3.4%
Too commercial/ overdeveloped	2.7%	1.5%	0.0%	3.4%	3.5%	0.0%	0.0%	5.4%

BRAND/ DESTINATION ADVOCACY - ISLAND OF HAWAI'I

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

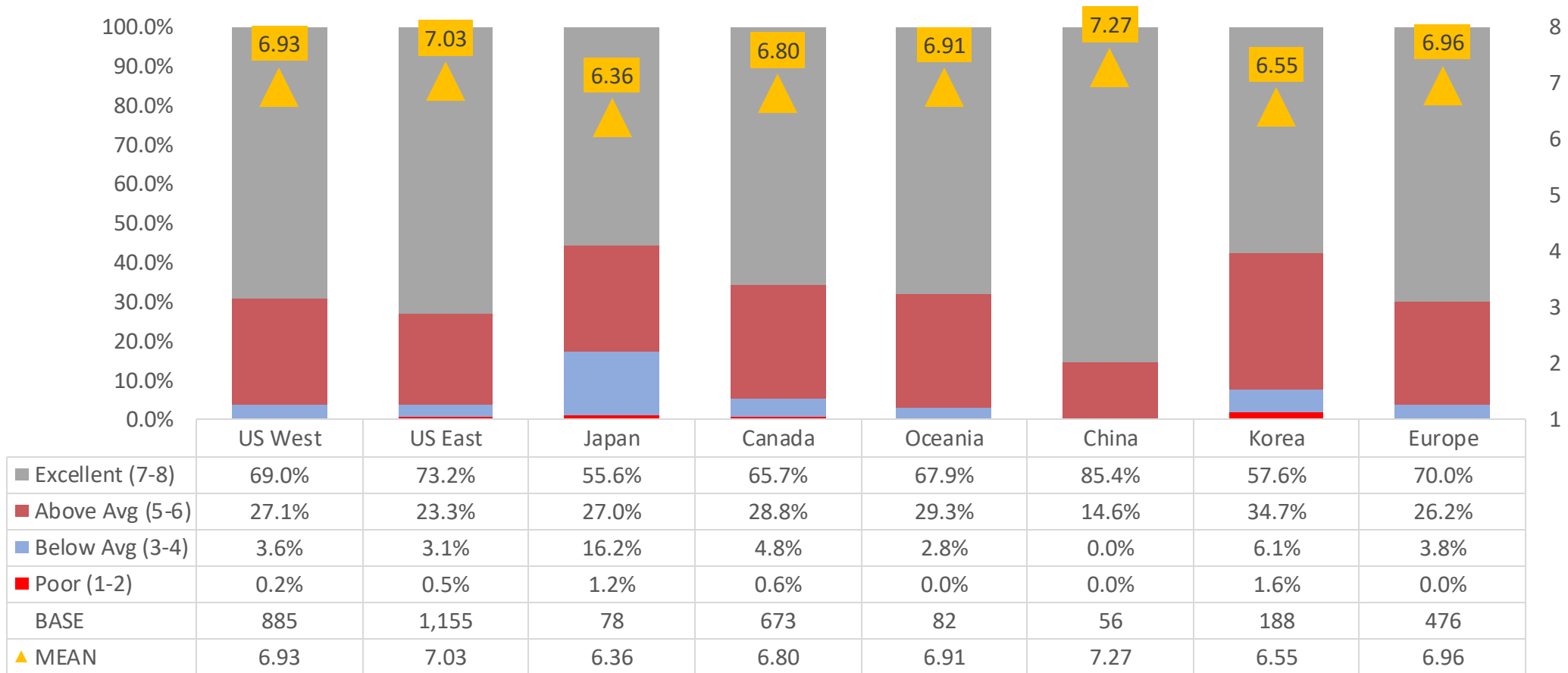


BRAND/ DESTINATION ADVOCACY - ISLAND OF HAWAI'I

- **Islands visited:** Visitors from **U.S. West** whose trip was limited to just the Island of Hawai'i were more likely to recommend it to others compared to those whose trip included stops on multiple islands.
- **Gender:** Female visitors from **U.S. West** and **U.S. East** were more likely to recommend the Island of Hawai'i than male travelers from these visitor markets.

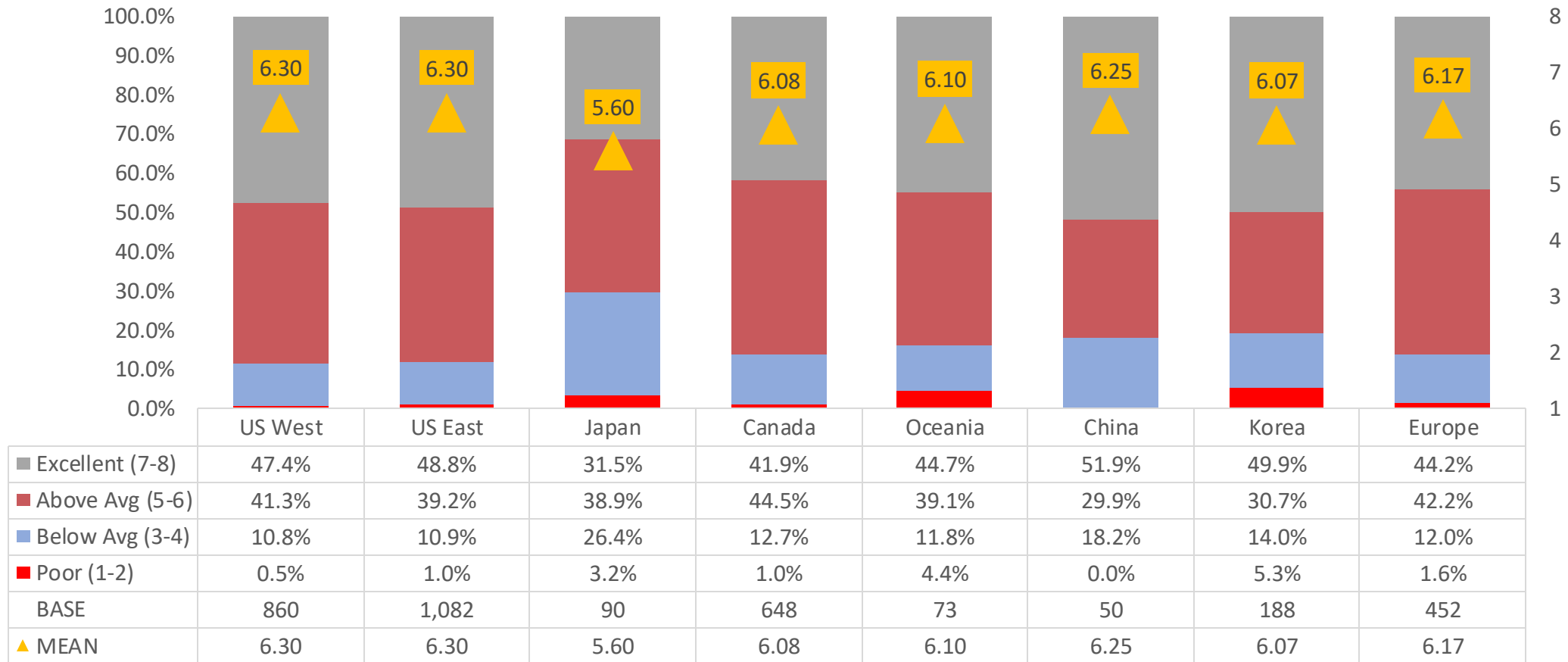
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



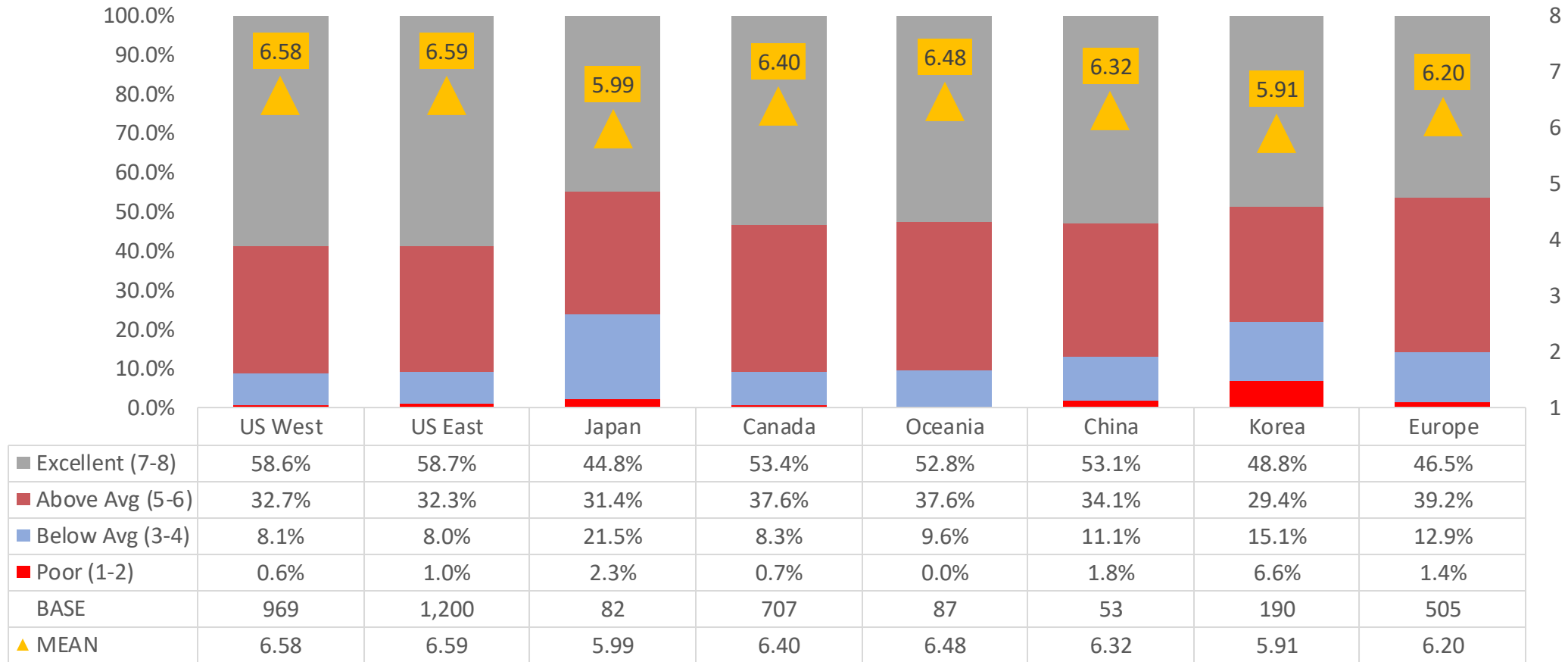
SHOPPING - ISLAND OF HAWAII

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



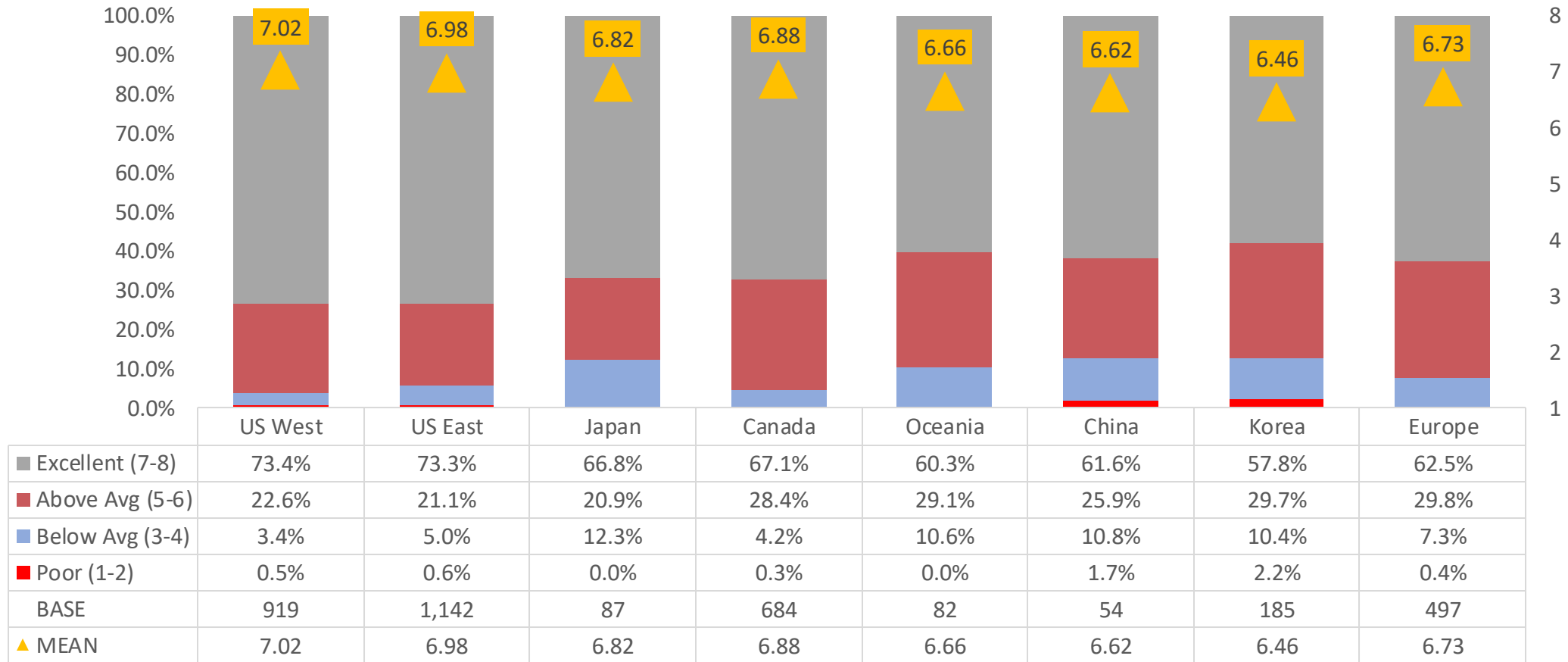
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



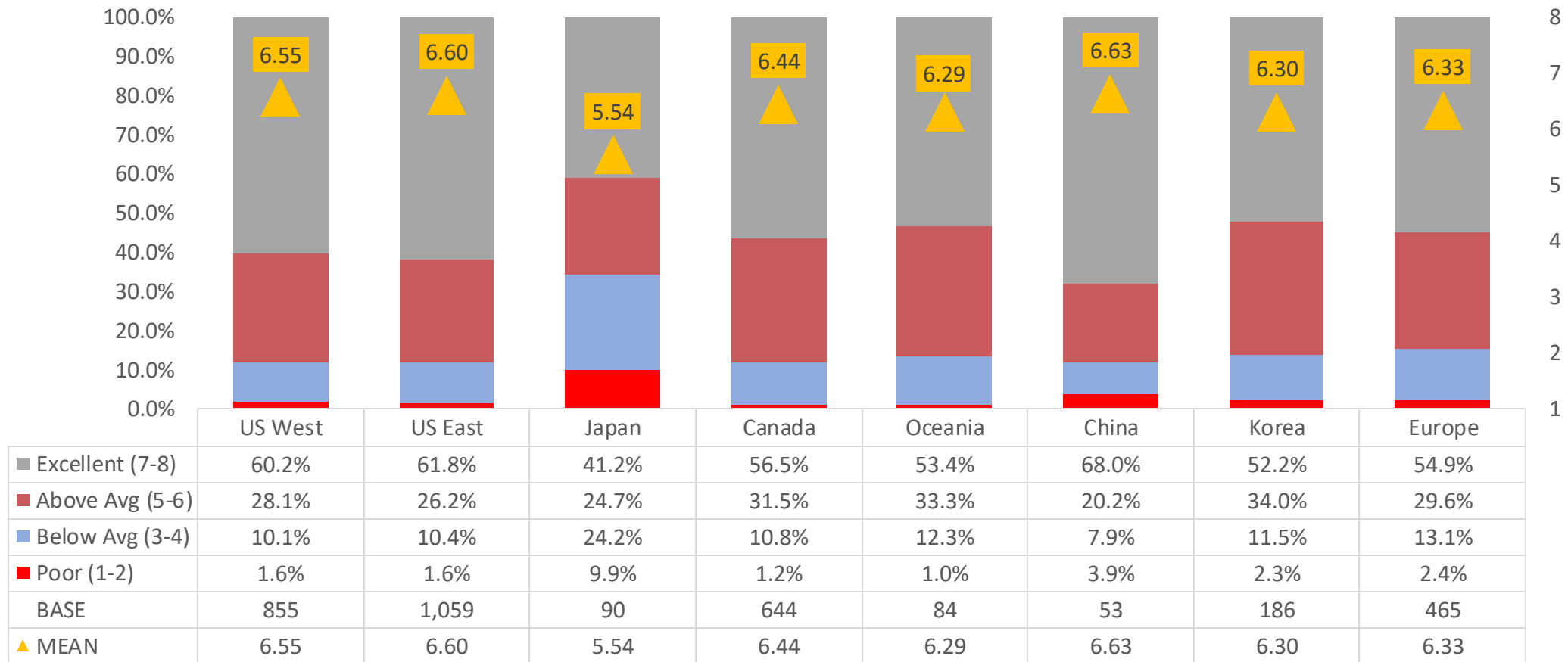
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



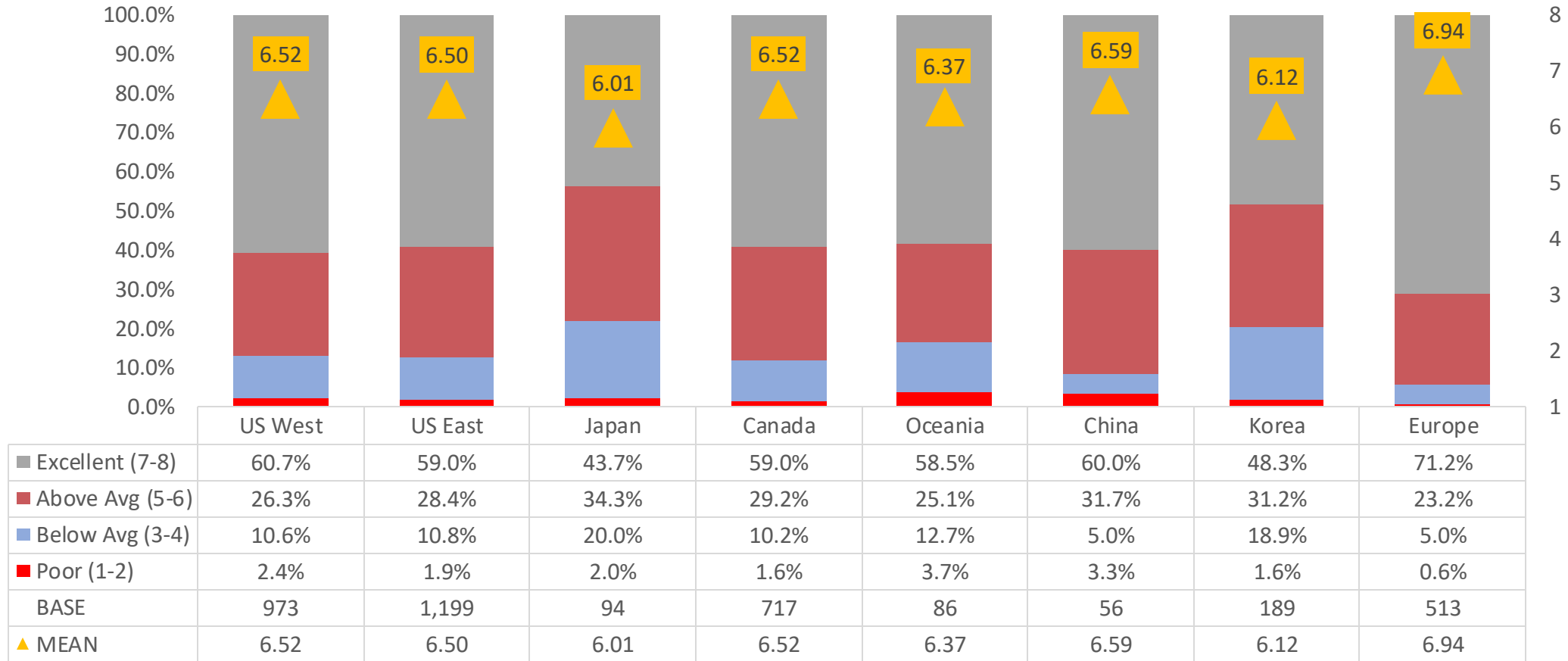
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



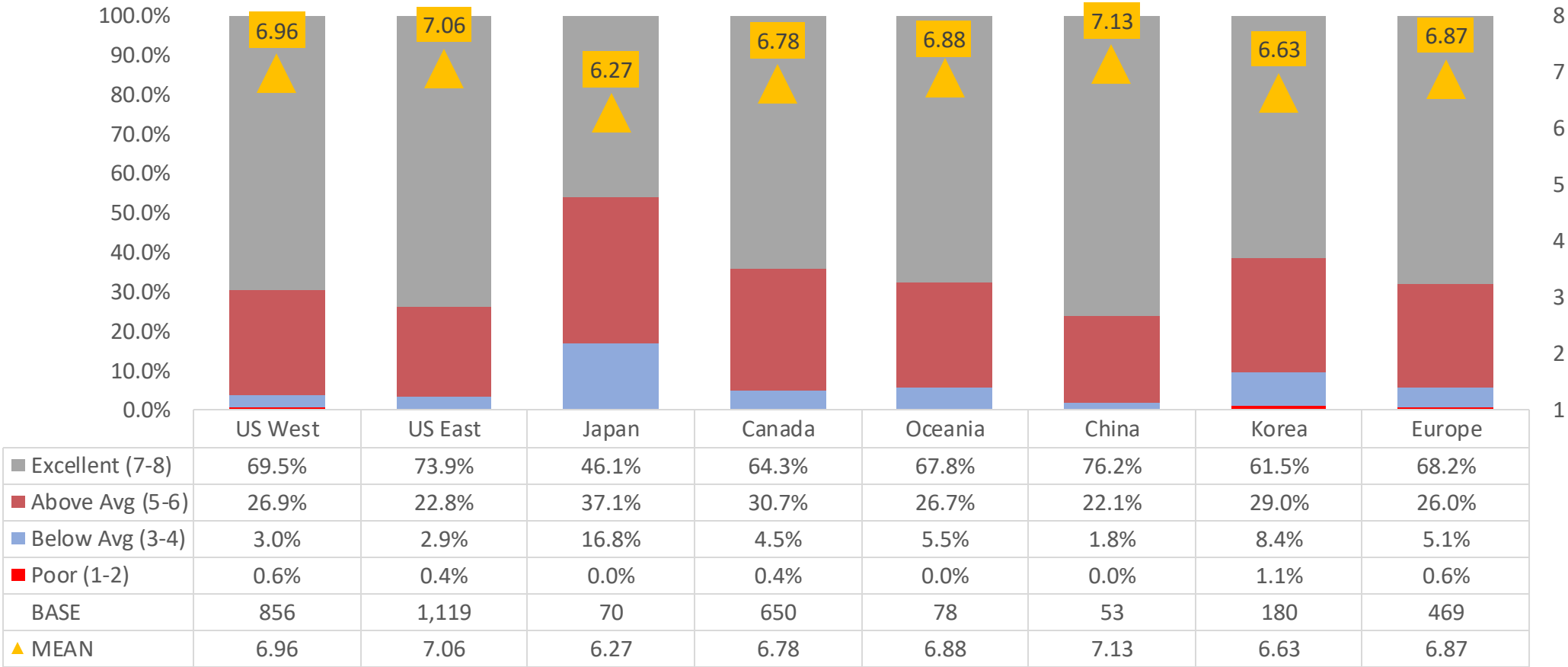
AIRPORT- ISLAND OF HAWAI'I

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



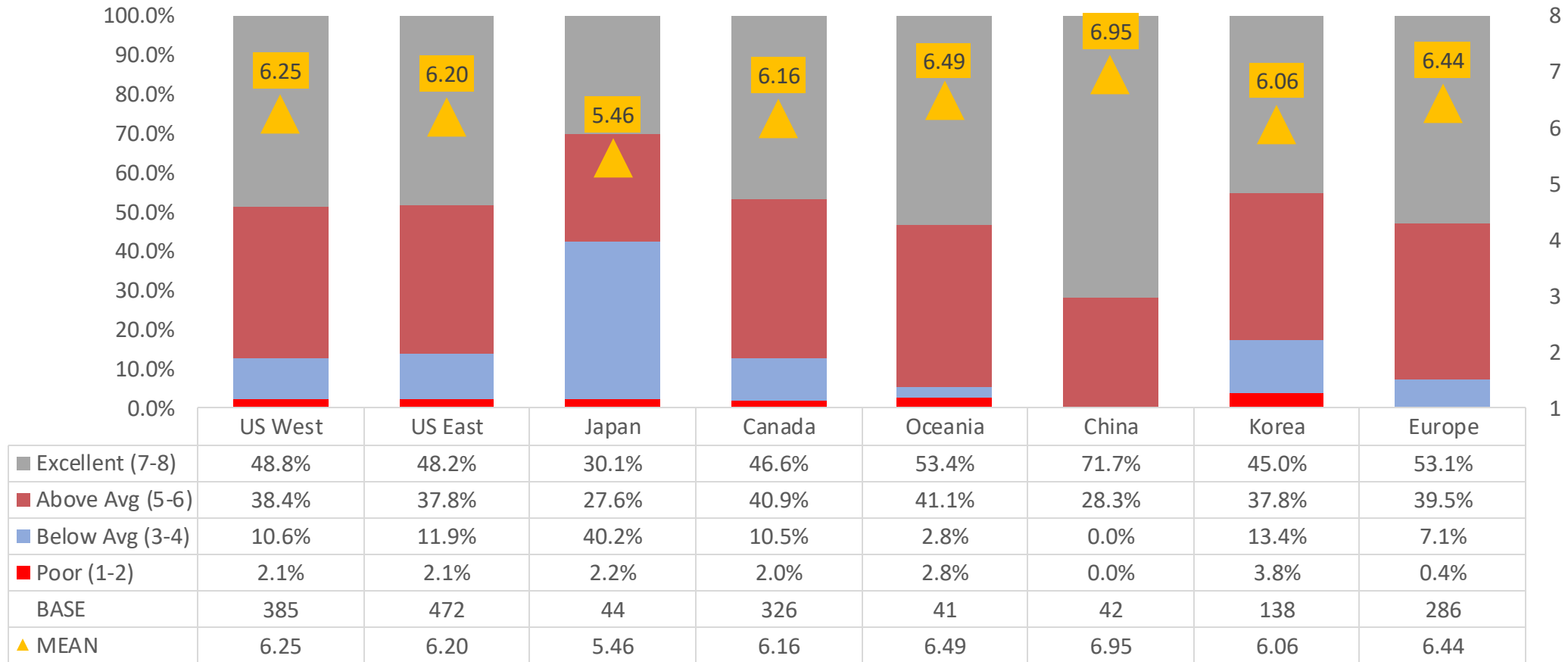
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



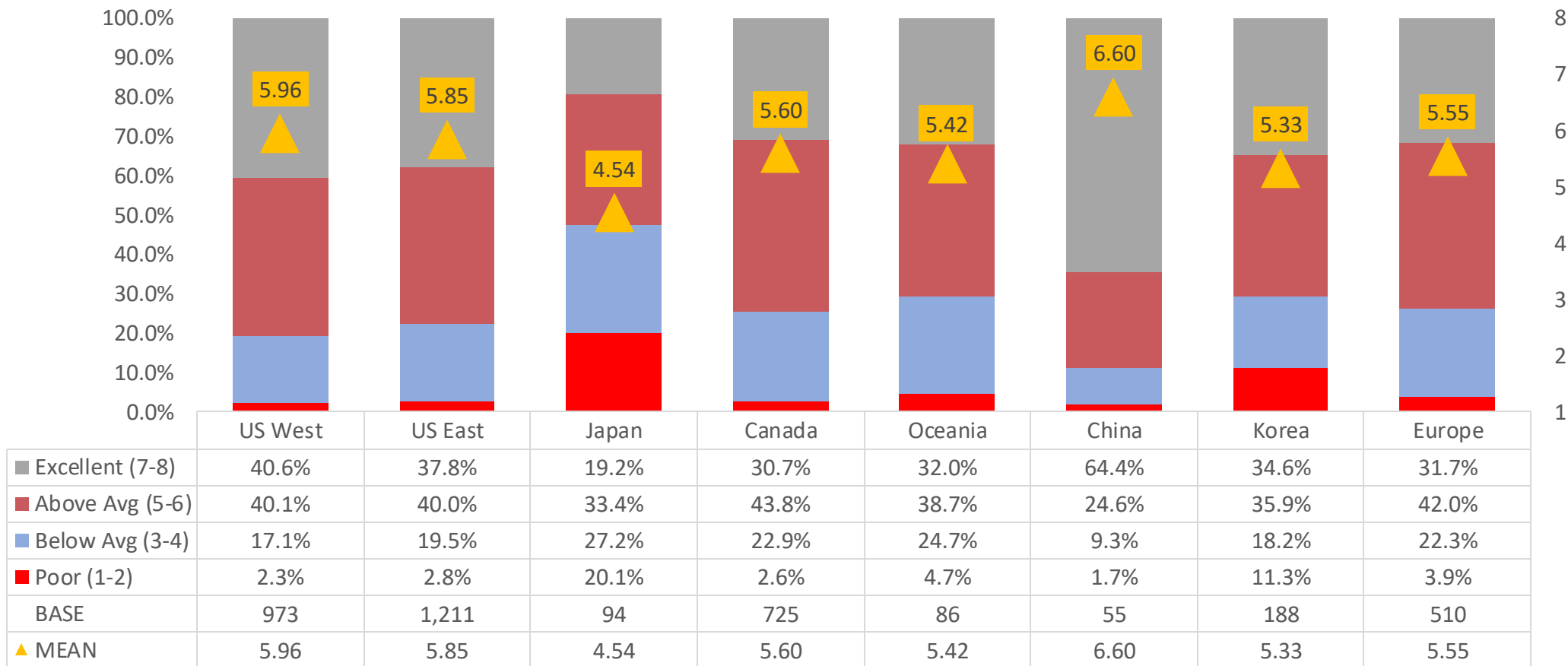
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



ISLAND OF HAWAI'I ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.9%	99.0%	99.0%	99.0%	97.4%	100.0%	100.0%	99.1%
On own (self-guided)/ driving around the island	88.4%	84.5%	73.4%	89.5%	64.7%	84.6%	81.8%	86.2%
Helicopter ride/ airplane tour	2.3%	4.6%	0.0%	2.4%	12.0%	5.4%	7.0%	8.3%
Boat tour/ submarine ride/ whale watching	27.1%	30.5%	2.2%	22.5%	26.9%	40.0%	30.5%	25.1%
Visiting towns/ communities	59.1%	60.8%	45.9%	60.1%	40.2%	27.1%	37.9%	50.6%
Private limousine/ van tour/ tour bus	5.3%	13.9%	21.6%	7.6%	23.7%	10.0%	12.8%	11.1%
Scenic views/ natural landmarks	63.4%	73.5%	38.4%	67.8%	64.1%	66.6%	69.1%	71.4%
Movie and TV filming location tours	0.6%	2.3%	1.0%	1.8%	3.6%	13.8%	17.1%	3.6%

ISLAND OF HAWAI'I ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.6%	96.1%	96.8%	98.3%	90.9%	95.0%	98.0%	95.7%
Beach/ sunbathing	81.6%	77.4%	55.3%	85.0%	57.0%	77.5%	82.7%	78.3%
Bodyboarding	9.3%	6.5%	1.0%	11.5%	2.6%	1.7%	5.2%	5.0%
Stand-up paddle boarding	5.0%	5.0%	2.0%	3.4%	1.0%	3.3%	4.0%	3.3%
Surfing	3.3%	3.3%	1.0%	5.5%	3.6%	2.1%	11.3%	7.9%
Canoe paddling	2.0%	1.6%	0.0%	3.9%	3.2%	3.3%	3.2%	2.5%
Kayaking	3.5%	3.5%	1.0%	3.8%	2.6%	2.1%	2.5%	3.7%
Swimming in the ocean	63.5%	58.7%	25.2%	69.0%	52.4%	34.2%	55.3%	66.2%
Snorkeling	49.9%	46.1%	7.3%	53.1%	35.9%	29.1%	59.0%	54.7%
Freediving	1.7%	0.8%	0.0%	1.6%	1.3%	1.7%	0.5%	2.7%
Windsurfing/ kitesurfing	0.1%	0.1%	0.0%	0.3%	0.0%	1.7%	0.6%	0.2%
Jet skiing/ parasailing	1.1%	0.8%	0.0%	0.9%	0.0%	1.7%	2.1%	0.2%
Scuba diving	3.1%	2.1%	1.0%	5.1%	1.3%	4.1%	1.0%	2.7%
Fishing	3.8%	4.0%	1.0%	2.7%	1.0%	5.4%	0.6%	1.2%
Golf	9.4%	6.0%	12.2%	9.4%	4.5%	0.0%	10.4%	3.2%

ISLAND OF HAWAI'I ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	96.6%	96.1%	96.8%	98.3%	90.9%	95.0%	98.0%	95.7%
Running/ jogging/ fitness walking	27.4%	23.7%	24.4%	28.5%	27.5%	9.2%	14.4%	20.2%
Cycling	2.8%	2.0%	1.2%	5.4%	0.0%	1.7%	0.5%	6.6%
Spa	6.6%	6.5%	1.0%	4.3%	8.1%	1.7%	6.2%	3.7%
Hiking	46.5%	54.0%	24.7%	50.6%	31.0%	58.8%	26.8%	51.4%
Backpacking/ camping	1.3%	1.4%	0.0%	2.0%	0.0%	1.7%	3.4%	3.9%
Agritourism	17.9%	19.9%	18.1%	15.0%	9.4%	6.7%	19.5%	13.7%
Sports event or tournament	2.3%	1.1%	2.0%	5.0%	5.8%	0.0%	0.0%	6.9%
Parks/ botanical gardens	40.4%	49.3%	30.6%	42.1%	43.1%	28.3%	23.2%	46.5%
Waterparks	0.9%	1.0%	5.3%	1.2%	1.9%	3.3%	2.1%	1.0%
Mountain tubing/ waterfall rappel	0.7%	0.7%	1.2%	0.9%	0.0%	3.7%	2.6%	2.7%
Zip-lining	4.2%	3.8%	0.0%	2.3%	0.0%	5.0%	1.5%	2.7%
Skydiving	0.1%	0.3%	0.0%	0.6%	0.0%	1.7%	0.5%	0.2%
All-terrain vehicle (ATV)	1.0%	3.7%	0.0%	1.9%	0.0%	3.3%	7.0%	4.3%
Horseback riding	1.1%	1.9%	3.1%	1.4%	0.0%	5.0%	0.0%	1.6%

ISLAND OF HAWAI'I ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.6%	97.0%	95.8%	98.1%	94.2%	98.3%	99.0%	97.5%
Lunch/ sunset/ dinner/ evening cruise	19.4%	20.1%	6.6%	19.8%	16.9%	44.1%	37.4%	21.8%
Live music/ stage show	23.7%	25.6%	9.8%	24.2%	19.1%	7.5%	13.1%	18.4%
Nightclub/ dancing/ bar/ karaoke	5.4%	5.1%	1.0%	5.7%	4.2%	3.3%	3.1%	3.5%
Fine dining	42.4%	41.3%	12.7%	34.9%	21.0%	29.6%	47.7%	24.3%
Family restaurant	64.2%	61.1%	23.4%	57.7%	54.1%	16.2%	37.7%	47.9%
Fast food	24.8%	29.4%	35.7%	33.6%	35.3%	45.5%	54.8%	39.5%
Food truck	28.9%	26.1%	5.3%	29.1%	33.7%	20.0%	55.8%	36.9%
Café/ coffee house	55.0%	52.6%	44.0%	57.6%	59.3%	36.2%	62.9%	62.1%
Ethnic dining	22.8%	25.7%	3.4%	19.2%	11.6%	17.1%	23.7%	10.9%
Farm-to-table cuisine	19.9%	20.2%	24.8%	13.8%	6.8%	0.0%	2.5%	8.6%
Prepared own meal	55.9%	46.0%	43.4%	64.6%	38.5%	21.3%	27.1%	49.4%

ISLAND OF HAWAI'I ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	95.2%	94.7%	98.0%	96.7%	86.4%	93.3%	96.4%	95.7%
Malls/ department stores	27.3%	26.2%	44.8%	40.3%	42.7%	32.1%	70.5%	41.1%
Designer boutiques	13.4%	17.3%	1.2%	12.2%	15.5%	3.3%	6.1%	8.5%
Hotel/ resort stores	27.9%	33.5%	21.9%	27.6%	23.6%	10.8%	28.9%	17.8%
Swap meet/ flea market	15.9%	12.1%	1.0%	11.7%	8.1%	1.7%	5.2%	4.4%
Discount/ outlet stores	10.7%	8.9%	9.3%	10.3%	20.1%	6.7%	52.7%	12.2%
Supermarkets	66.6%	60.6%	65.8%	67.5%	50.8%	48.3%	51.5%	70.1%
Farmer's market	55.7%	46.8%	27.4%	53.8%	44.6%	30.4%	9.0%	47.4%
Convenience stores	42.9%	43.5%	17.2%	45.1%	51.8%	37.1%	55.9%	31.9%
Duty-free stores	1.3%	2.1%	1.0%	4.9%	9.7%	6.7%	30.8%	5.3%
Hawai'i-made products	46.2%	50.4%	21.3%	42.9%	32.4%	20.4%	25.5%	46.3%
Local shops and artisans	58.0%	62.4%	25.9%	57.2%	40.8%	15.8%	23.2%	48.9%
Local fashion designers	7.2%	6.5%	6.1%	7.5%	12.3%	0.0%	0.5%	10.2%

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

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	67.9%	77.4%	59.2%	75.6%	66.0%	73.3%	67.5%	75.1%
Historic military sites and museums	9.3%	17.5%	12.5%	10.7%	19.1%	17.1%	21.9%	25.2%
Historic Hawaiian sites and museums	44.7%	48.8%	21.2%	45.4%	28.8%	30.8%	10.1%	48.3%
Other historical sites, museums, and homes	18.0%	18.6%	15.8%	17.1%	16.2%	15.4%	25.9%	18.4%
Art museums	2.5%	2.0%	0.0%	3.0%	1.3%	5.0%	4.7%	2.9%
Art galleries and exhibitions	10.9%	10.7%	4.1%	11.5%	3.2%	1.7%	0.5%	9.9%
Lū'au/ Polynesian show/ hula show	15.1%	29.6%	9.5%	22.5%	12.3%	13.8%	21.8%	19.7%
Lesson- e.g. ukulele, hula, canoe, lei making	3.2%	5.1%	3.2%	4.3%	5.8%	7.1%	4.6%	3.3%
Play/ concert/ theatre	2.2%	2.1%	0.0%	2.2%	1.3%	1.7%	3.0%	2.1%
Art/ craft fair	13.9%	12.7%	2.2%	13.0%	13.9%	5.0%	5.3%	5.8%
Festival/ event	4.5%	4.3%	5.4%	4.6%	8.8%	0.0%	4.4%	4.2%

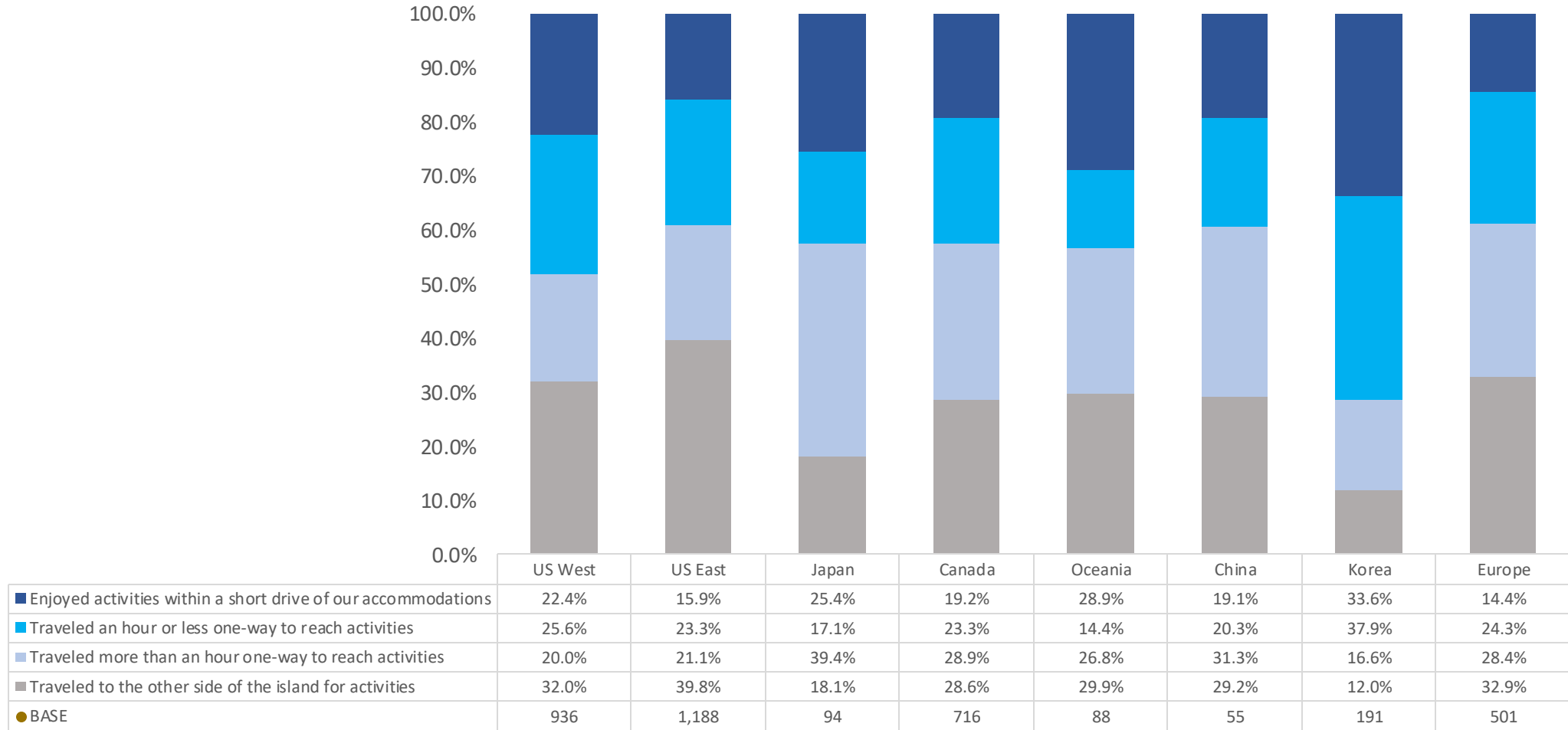
ISLAND OF HAWAI'I ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	91.6%	93.1%	95.8%	93.4%	95.5%	95.0%	96.6%	94.0%
Airport shuttle	14.7%	16.8%	11.8%	17.3%	23.3%	15.4%	11.1%	18.9%
Trolley	0.8%	1.5%	4.4%	2.7%	5.5%	0.0%	21.4%	4.1%
Public bus	1.9%	2.0%	5.6%	4.3%	16.9%	10.4%	9.8%	13.1%
Tour bus/ tour van	4.5%	13.3%	24.0%	6.8%	26.9%	8.8%	26.2%	11.0%
Taxi/ limo	4.6%	6.3%	18.3%	7.6%	21.4%	7.1%	22.3%	9.7%
Rental car	80.2%	76.9%	50.2%	80.3%	51.8%	68.7%	61.3%	78.2%
Ride share	10.5%	13.3%	13.9%	11.1%	29.5%	15.8%	25.6%	14.4%
Car share	3.6%	3.4%	0.0%	3.5%	3.6%	0.0%	4.9%	1.6%
Bicycle rental	1.2%	1.6%	0.0%	2.4%	1.3%	0.0%	1.5%	3.1%

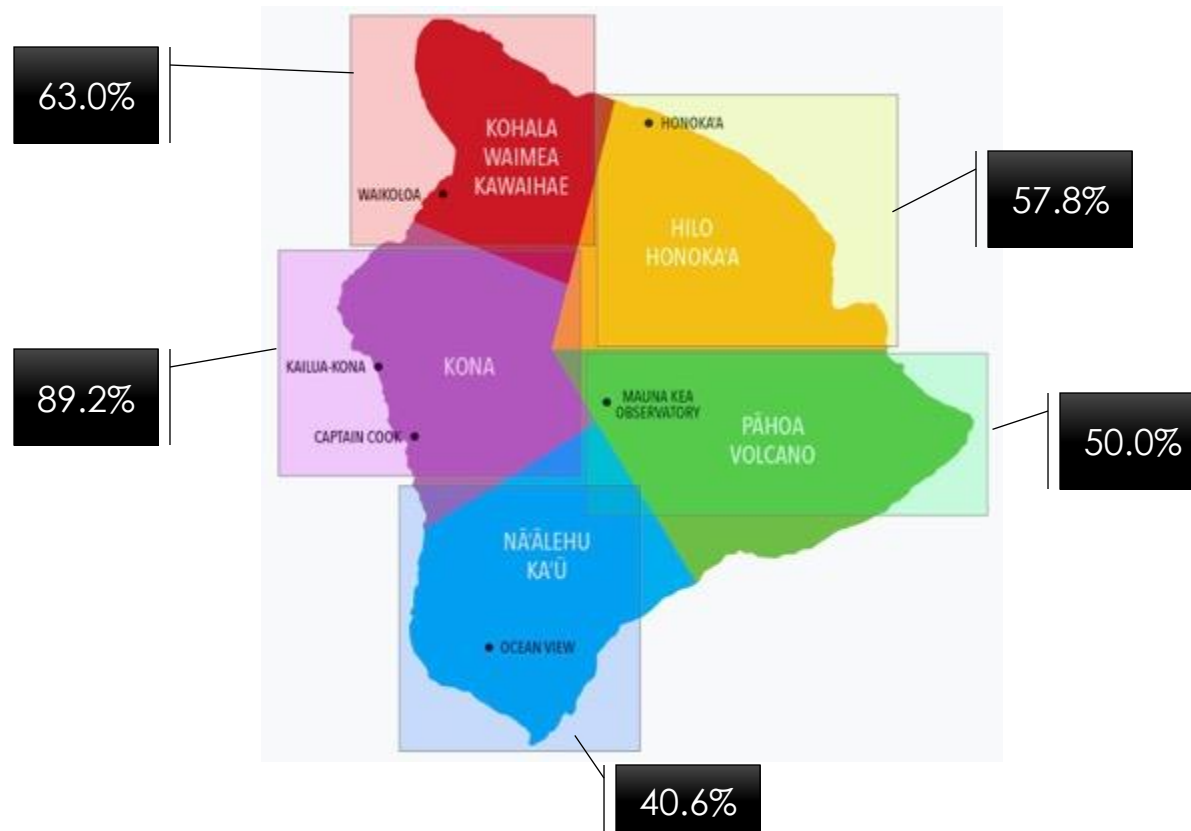
ISLAND OF HAWAI'I ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	33.8%	26.1%	14.9%	24.3%	18.1%	7.9%	21.8%	18.7%
Visiting friends/ relatives	32.9%	25.1%	12.7%	22.3%	15.5%	7.9%	18.4%	15.8%
Giving back to the local community	2.4%	1.3%	3.2%	2.6%	2.6%	0.0%	4.5%	3.9%

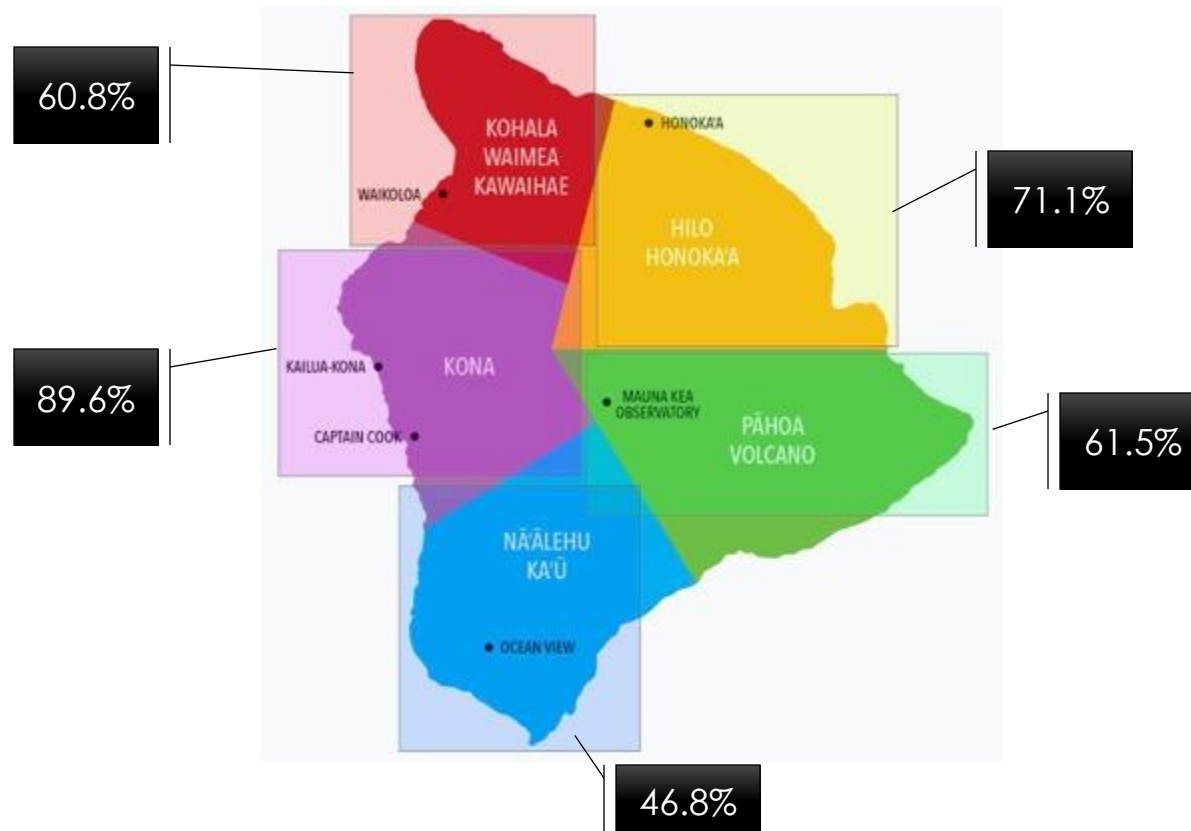
TRAVEL ON ISLAND OF HAWAI'I



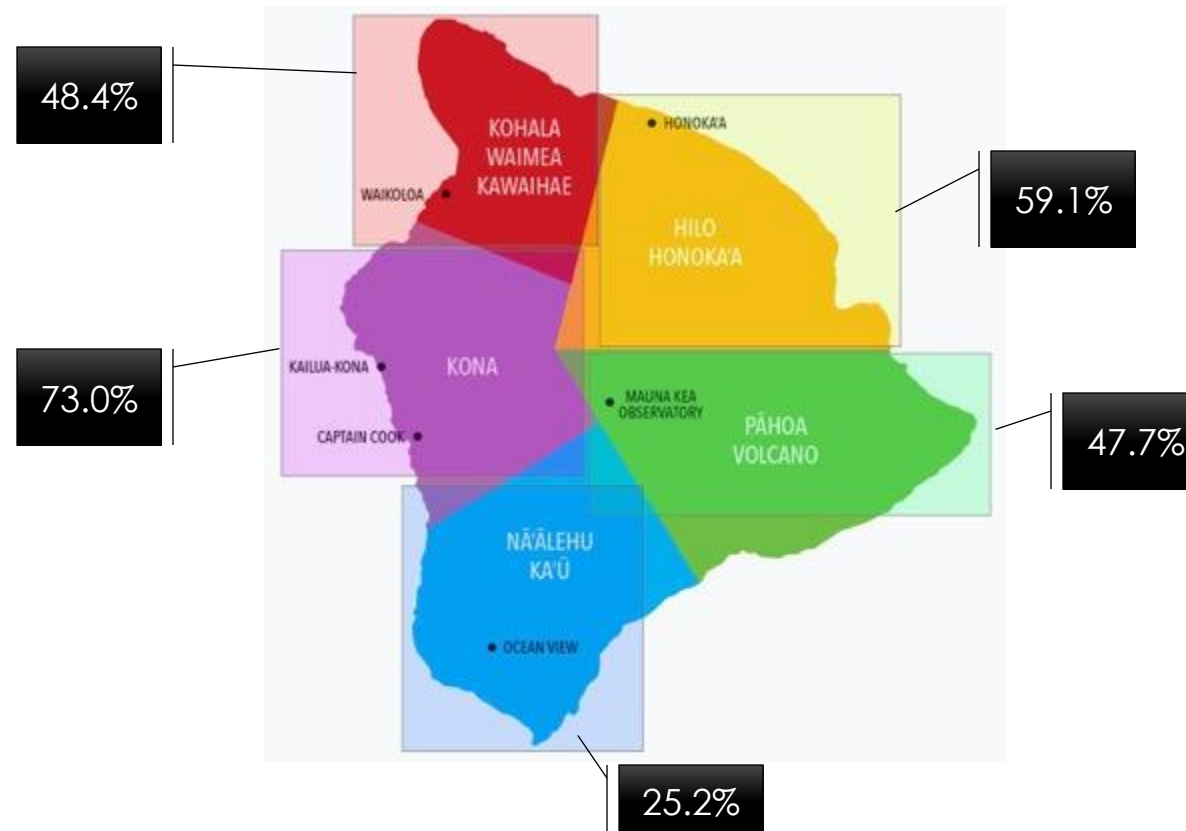
AREAS VISITED - ISLAND OF HAWAI'I U.S. WEST



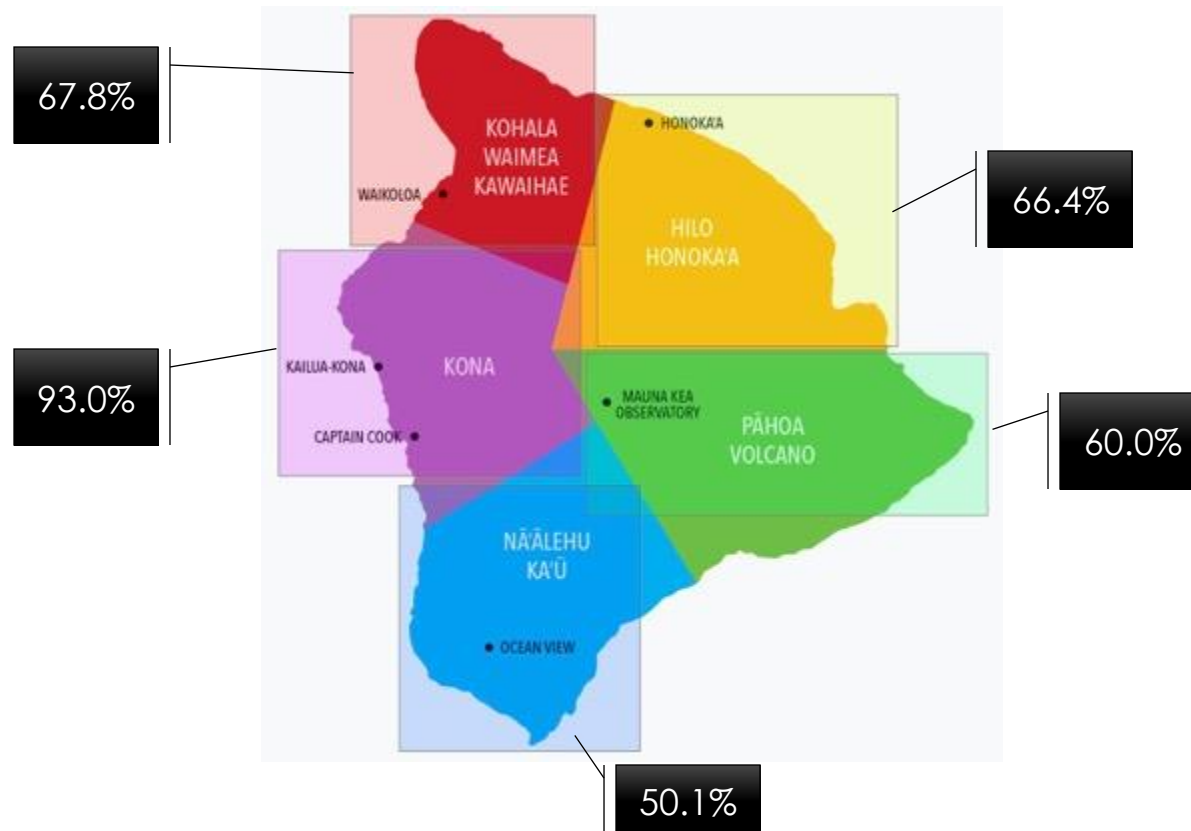
AREAS VISITED - ISLAND OF HAWAI'I U.S. EAST



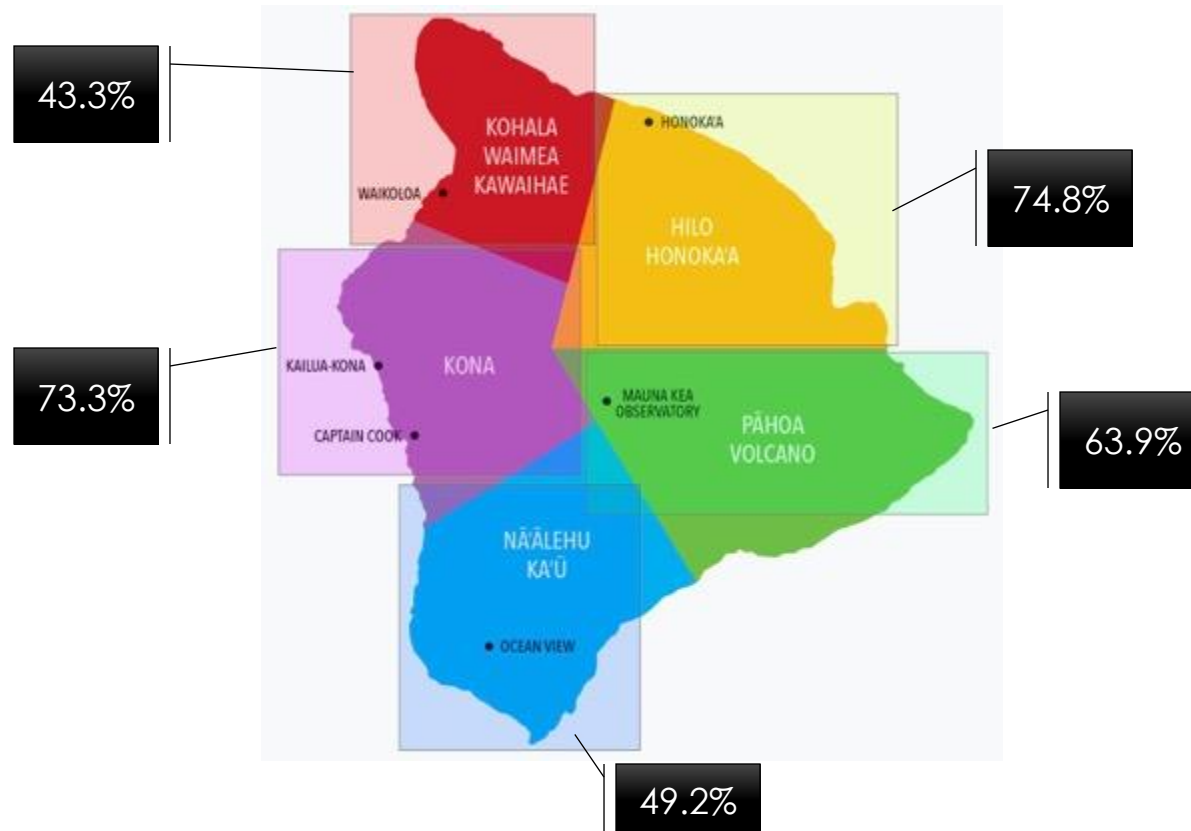
AREAS VISITED - ISLAND OF HAWAI'I JAPAN



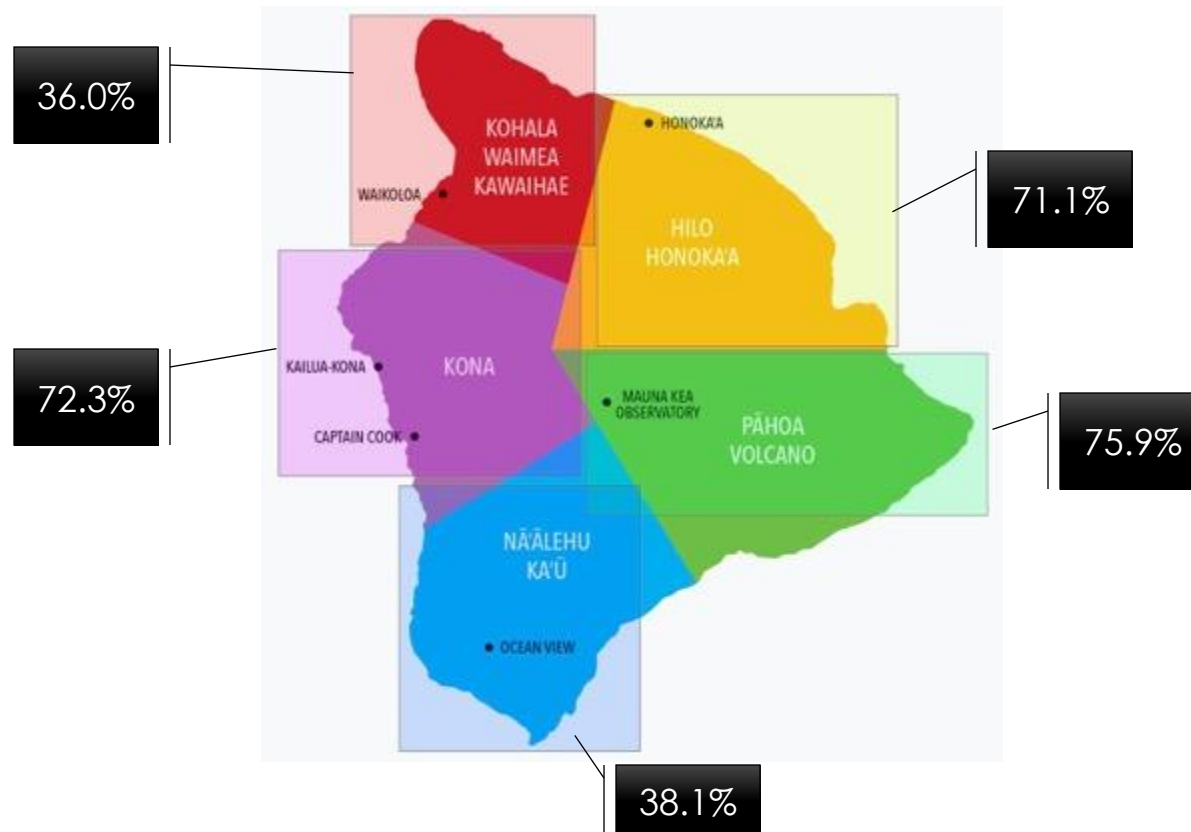
AREAS VISITED - ISLAND OF HAWAI'I CANADA



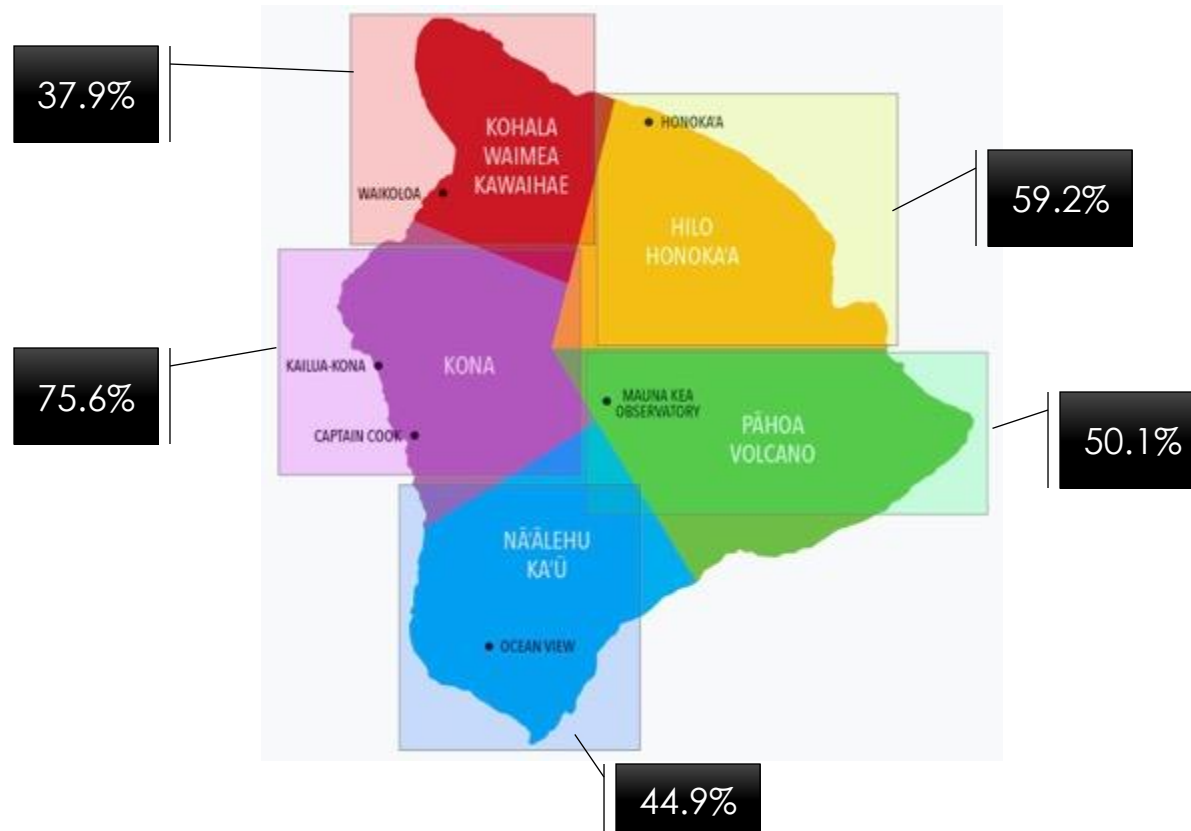
AREAS VISITED - ISLAND OF HAWAI'I OCEANIA



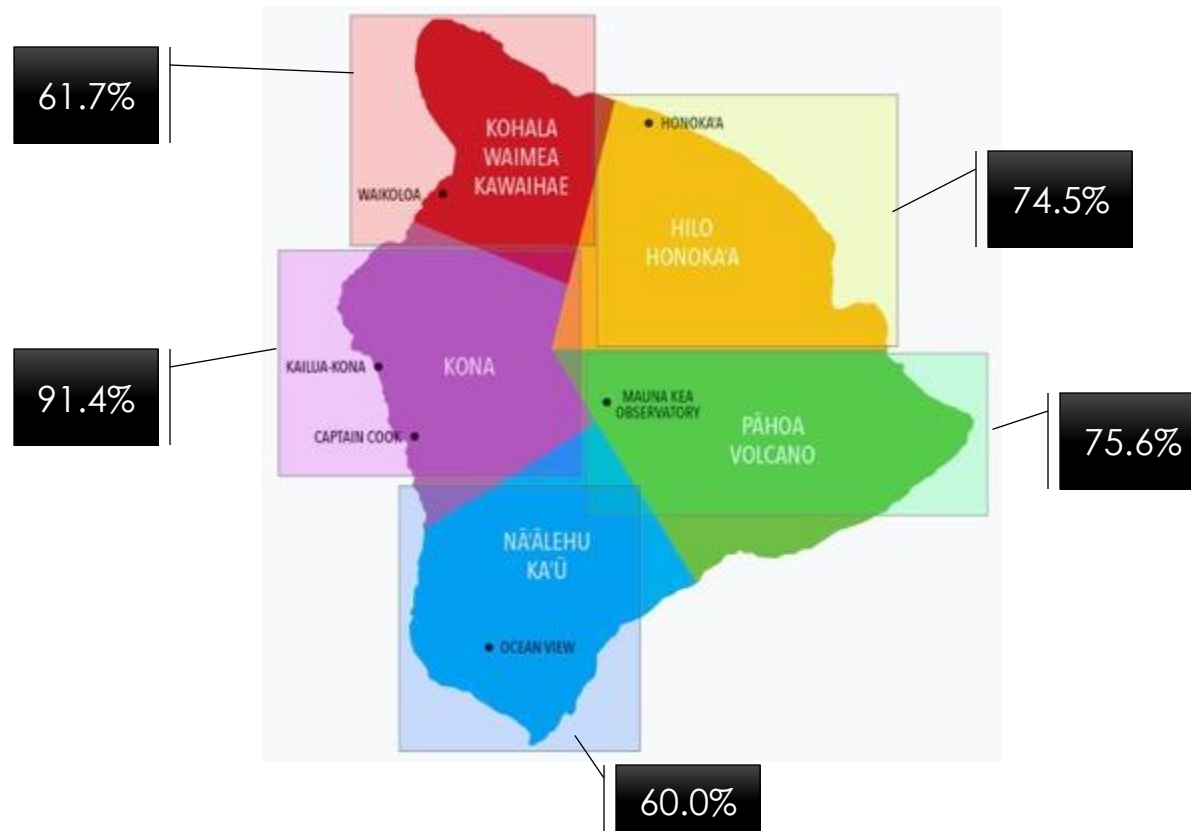
AREAS VISITED - ISLAND OF HAWAI'I CHINA



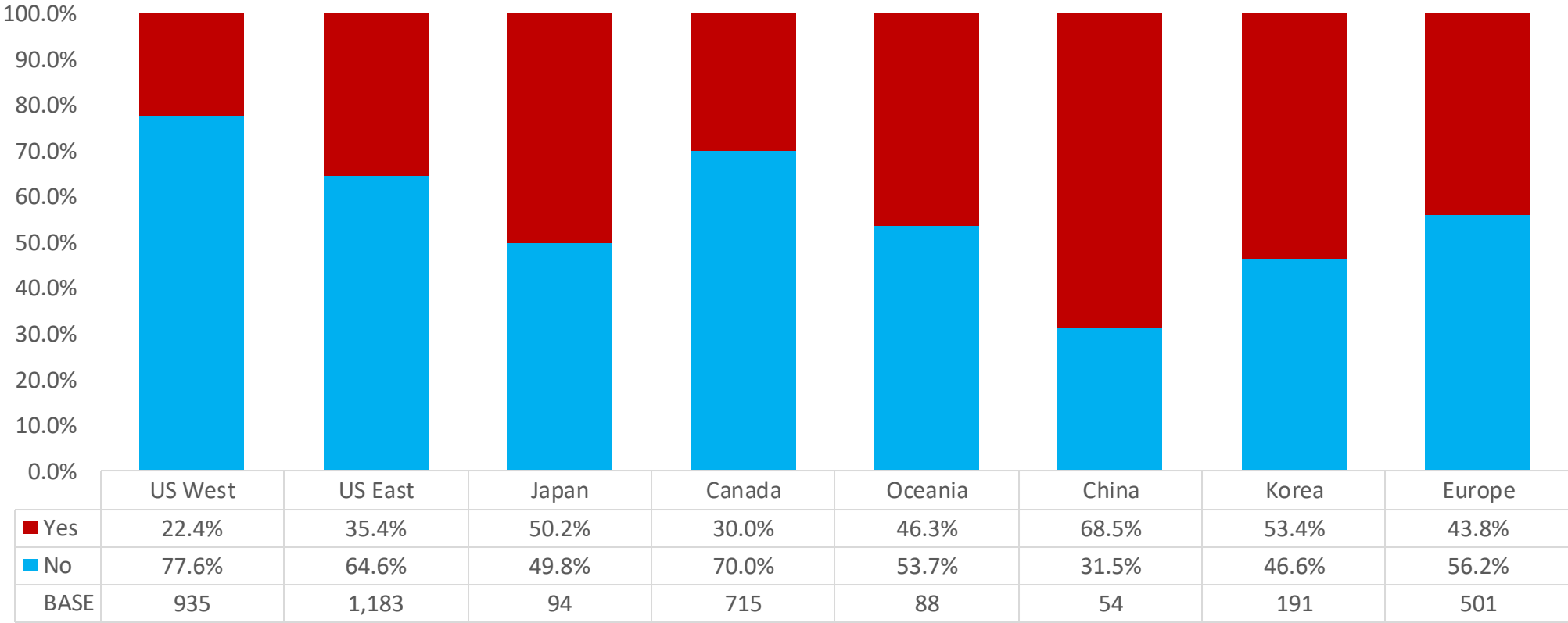
AREAS VISITED - ISLAND OF HAWAI'I KOREA



AREAS VISITED - ISLAND OF HAWAI'I EUROPE

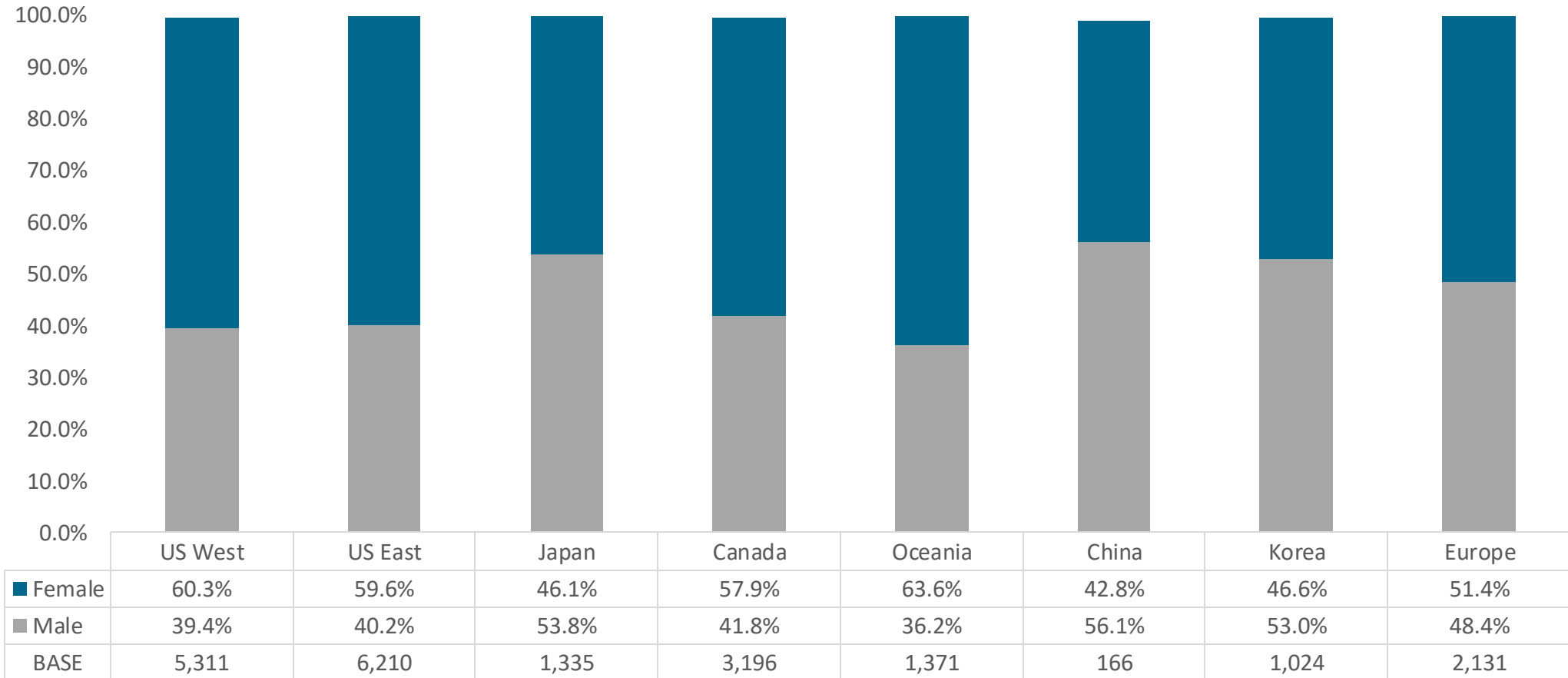


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

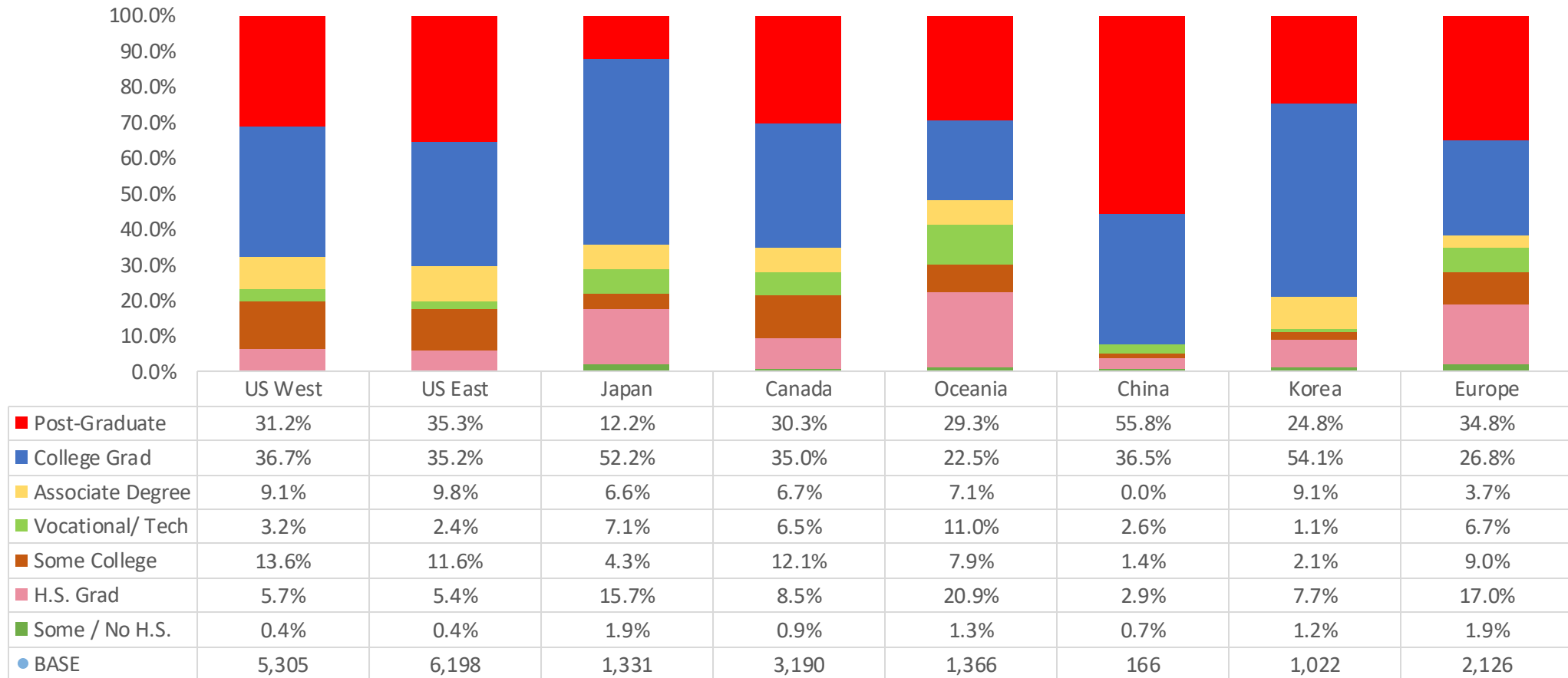


Section 27 – Visitor Profile

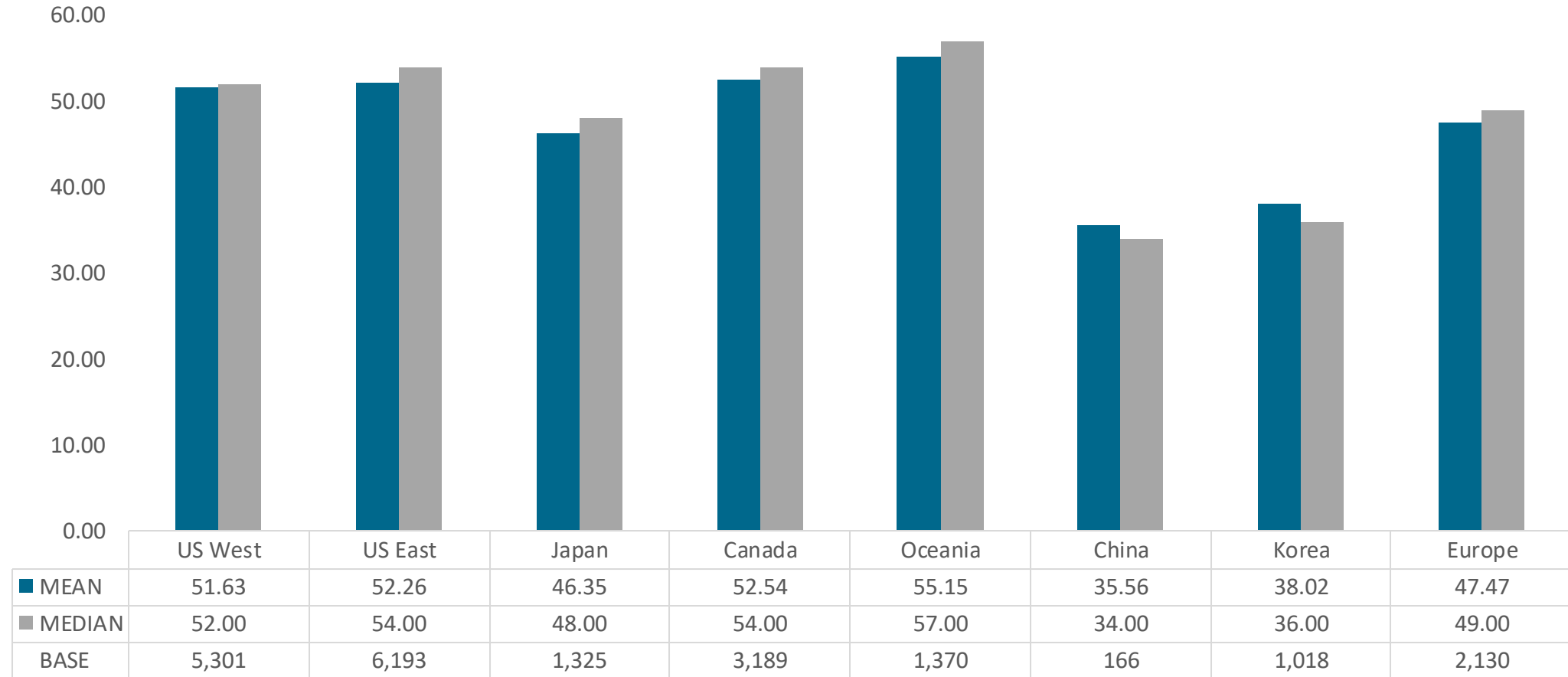
VISITOR PROFILE - GENDER



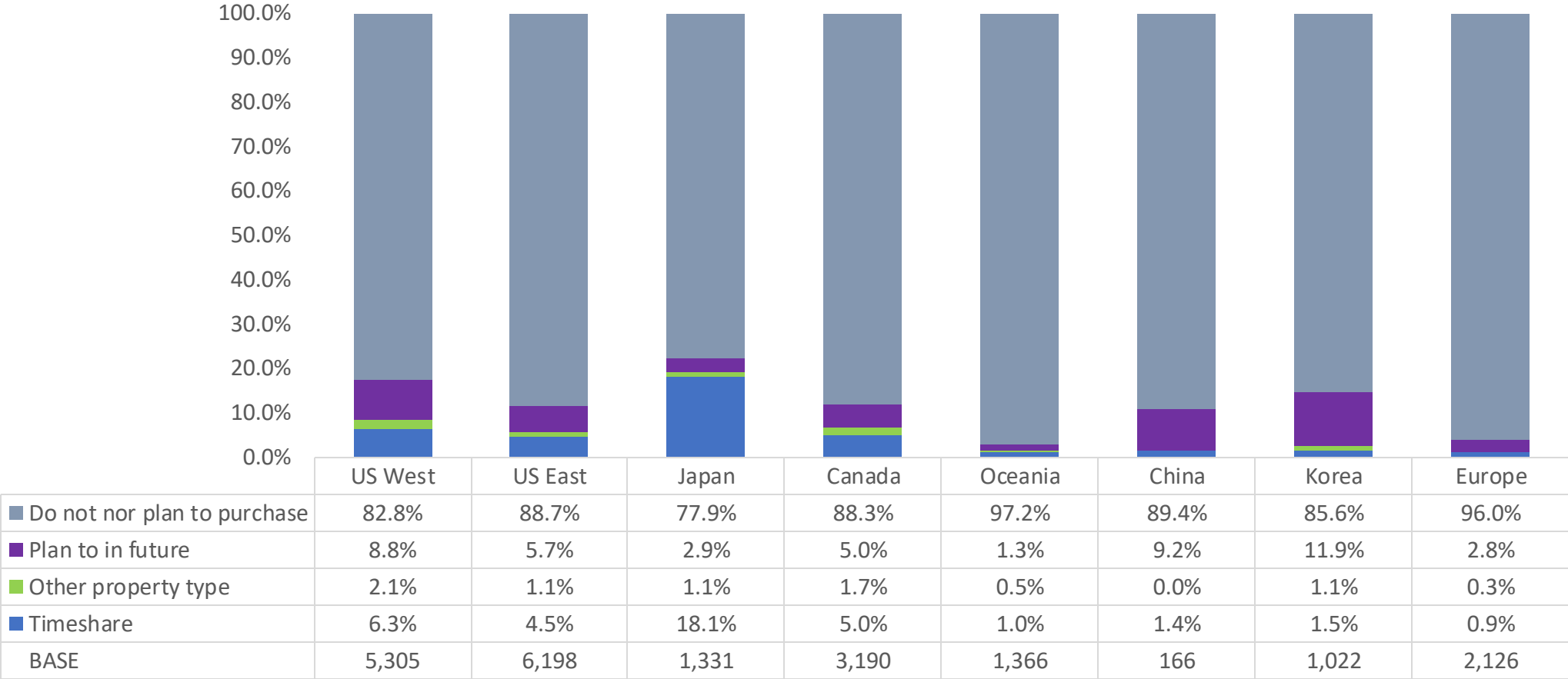
VISITOR PROFILE - EDUCATION



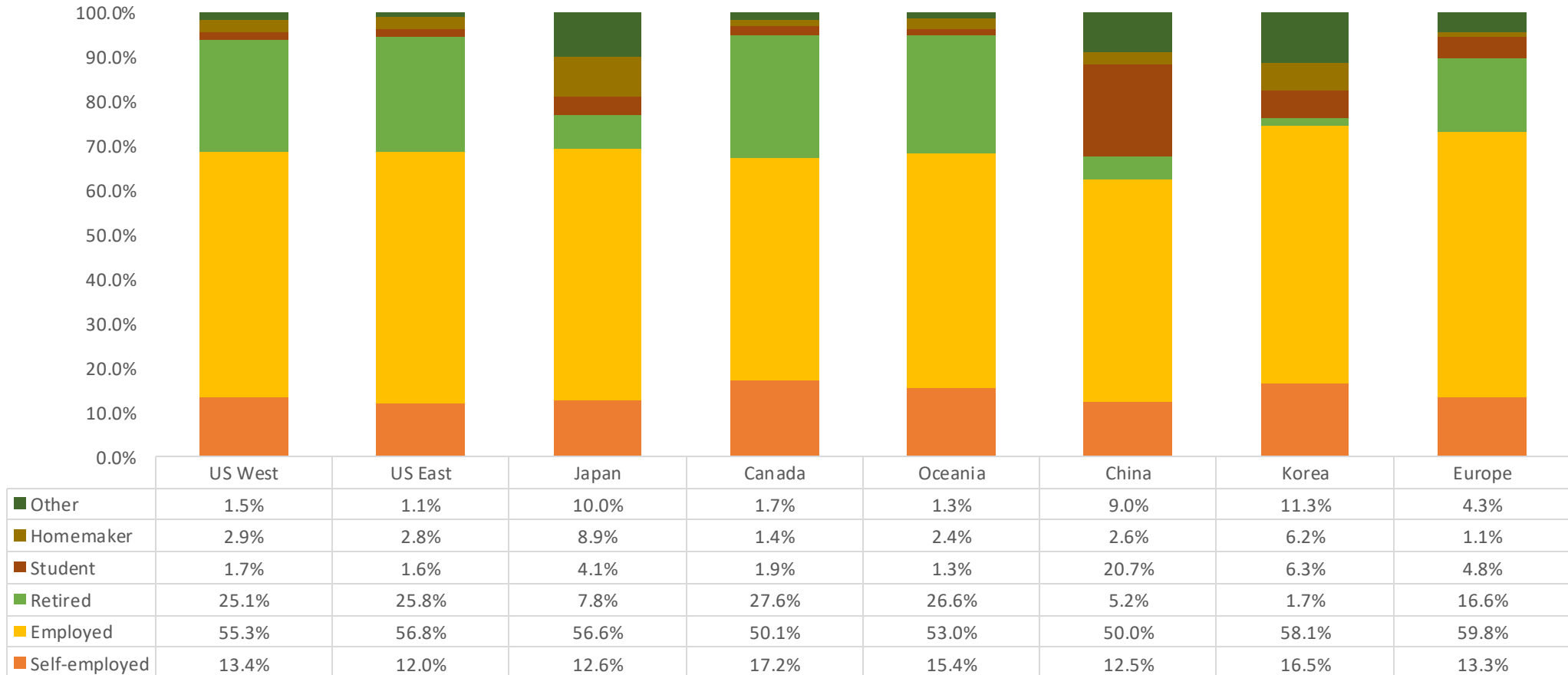
VISITOR PROFILE - AGE



VISITOR PROFILE - HAWAI'I PROPERTY OWNER



EMPLOYMENT STATUS



COMPETITIVE BRANDSET

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Other U.S. States	74.5%	81.9%	18.0%	64.2%	56.3%	60.3%	19.2%	48.1%
California	62.8%	43.2%	9.3%	36.3%	37.7%	44.9%	12.4%	42.4%
Las Vegas	51.2%	34.6%	6.1%	28.9%	30.6%	34.1%	11.0%	29.1%
Europe	34.3%	34.4%	14.2%	39.4%	32.6%	21.8%	22.4%	87.4%
Florida	27.6%	59.0%	3.8%	29.4%	11.9%	18.7%	2.5%	23.7%
New York City	28.5%	42.9%	7.8%	25.3%	31.6%	48.2%	10.6%	36.3%
Mexico	35.3%	26.5%	1.6%	33.6%	8.2%	9.8%	2.0%	13.4%
Canada	24.6%	24.3%	3.8%	63.9%	24.2%	16.3%	5.0%	18.6%
Caribbean	14.5%	29.9%	1.1%	26.3%	5.4%	3.0%	0.4%	16.8%
Japan	8.4%	5.6%	44.7%	7.4%	12.1%	40.8%	47.8%	10.2%
Alaska	14.2%	11.4%	0.6%	7.3%	11.4%	8.8%	1.3%	3.9%
Other Asia	6.4%	4.5%	15.2%	6.5%	14.6%	19.1%	19.2%	12.5%
Central America	7.6%	8.5%	1.3%	7.6%	3.4%	2.4%	1.4%	7.0%
Australia	4.6%	4.3%	8.0%	7.4%	67.1%	11.7%	9.6%	13.1%
South America	5.9%	6.4%	1.2%	6.8%	4.4%	4.0%	1.4%	9.2%
Korea	3.5%	2.5%	17.4%	3.2%	2.3%	21.6%	43.7%	2.9%
None of these	4.1%	3.7%	12.9%	5.0%	2.9%	1.4%	14.7%	3.2%
Thailand	3.5%	2.4%	11.4%	4.0%	12.7%	14.7%	18.3%	12.0%
China	3.5%	2.7%	7.4%	4.3%	6.0%	66.1%	11.4%	4.7%
New Zealand	3.5%	2.8%	1.5%	4.6%	41.0%	6.7%	2.8%	6.7%
Vietnam	2.0%	1.6%	6.9%	2.8%	8.8%	6.0%	27.7%	5.3%
Bali	1.8%	1.1%	5.4%	2.0%	15.6%	8.4%	6.4%	6.8%
Tahiti	1.9%	1.1%	0.4%	1.7%	2.7%	0.7%	0.4%	2.5%
Guam/ Saipan	0.8%	1.0%	5.8%	0.3%	0.4%	1.3%	14.4%	0.2%
Fiji	1.3%	0.9%	0.1%	1.4%	17.9%	0.0%	0.1%	1.6%

Section 28 – 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 \pm
U.S. West	2,898	1.82
U.S. East	4,327	1.49
Japan	1,362	2.66
Canada	1,698	2.38
Oceania	1,466	2.56
China	167	7.58
Korea	969	3.15
Europe	1,884	2.26
All MMAs	14,771	0.81

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 \pm
U.S. West	1,055	3.02
U.S. East	1,469	2.56
Japan	18	23.10
Canada	760	3.55
Oceania	89	10.39
China	12	28.29
Korea	29	18.20
Europe	545	4.20
All MMAs	3,977	1.55

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 \pm
U.S. West	1,503	2.53
U.S. East	1,989	2.20
Japan	20	21.91
Canada	1,172	2.86
Oceania	103	9.66
China	25	19.60
Korea	57	12.98
Europe	769	3.53
All MMAs	5,638	1.31

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 \pm
U.S. West	1,095	2.96
U.S. East	1,600	2.45
Japan	96	10.00
Canada	933	3.21
Oceania	126	8.73
China	67	11.97
Korea	203	6.88
Europe	746	3.59
All MMAs	4,866	1.40

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT LĀNA‘Ī

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 Lāna‘i.

MMA	Completed	Margin of Error \pm
U.S. West	35	16.56
U.S. East	71	11.63
Japan	3	56.58
Canada	28	18.52
Oceania	8	34.65
China	1	98.00
Korea	1	98.00
Europe	17	23.77
All MMAs	164	7.65

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MOLOKA'I

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

MMA	Completed	Margin of Error \pm
U.S. West	22	20.89
U.S. East	46	14.45
Japan	0	
Canada	22	20.89
Oceania	3	56.58
China	0	
Korea	1	98.00
Europe	22	20.89
All MMAs	116	9.10