



VISITOR SATISFACTION STUDY QUARTER 1, 2026

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

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Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 1, 2026 report include survey results from: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, Europe, Korea and China.

Visitor market	SURVEYS	Margin of Error \pm	Online Response Rate
U.S. West	967	3.15	10.7%
U.S. East	960	3.16	11.1%
Japan	261	6.07	10.4%
Canada	91	10.27	6.5%
Oceania	18	23.10	13.9%
China	21	21.39	6.8%
Korea	323	5.45	3.6%
Europe	35	16.56	5.8%
All visitor markets	2,676	1.89	10.5%

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from completed Domestic In-flight surveys and International Departure Intercept surveys. 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, Japan and China at the Daniel K. Inouye International Airport in Honolulu.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 1, 2026. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

Data for 2026 and 2025 are preliminary. Data for all other prior years reflect final visitor statistics from DBEDT Annual Visitor Satisfaction and Activity reports.

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.

Survey Methodology (cont.)

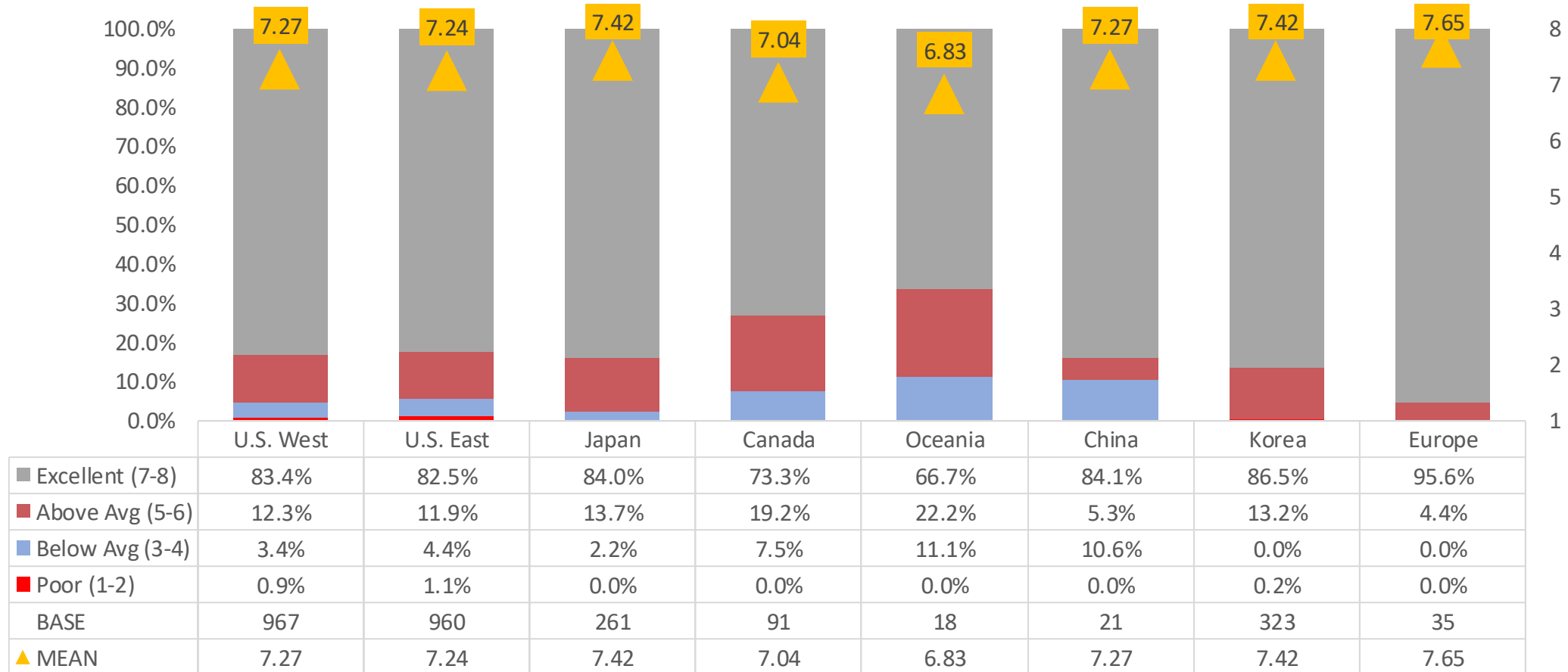
On March 1, 2025, the Hawai'i Department of Agriculture (HDOA) launched Akamai Arrival, a pilot program which allows passengers on Domestic flights from the U.S. Mainland to complete the mandatory Plant and Animals Declaration Form online. Akamai Arrival launched without the In-flight Tourism Survey, which historically served as a primary source for allowing visitors to opt-in to be contacted for the Visitor Satisfaction and Activity Survey (VSAT). Paper forms continued to be distributed on flights which were not participating in the pilot program.

The Digital Tourism Survey was launched on December 24, 2025, allowing passengers to complete a digital version of the In-flight Tourism Survey (Digital Tourism Survey) and opt-in to be contacted for VSAT. A link to the Digital Tourism Survey is provided to passengers who complete Akamai Arrival. Data and email addresses captured through the Digital Tourism Survey have been included in the sampling for this quarter.

Section 1 – Visitor Satisfaction

SATISFACTION - STATE OF HAWAI'I BY VISITOR MARKET

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



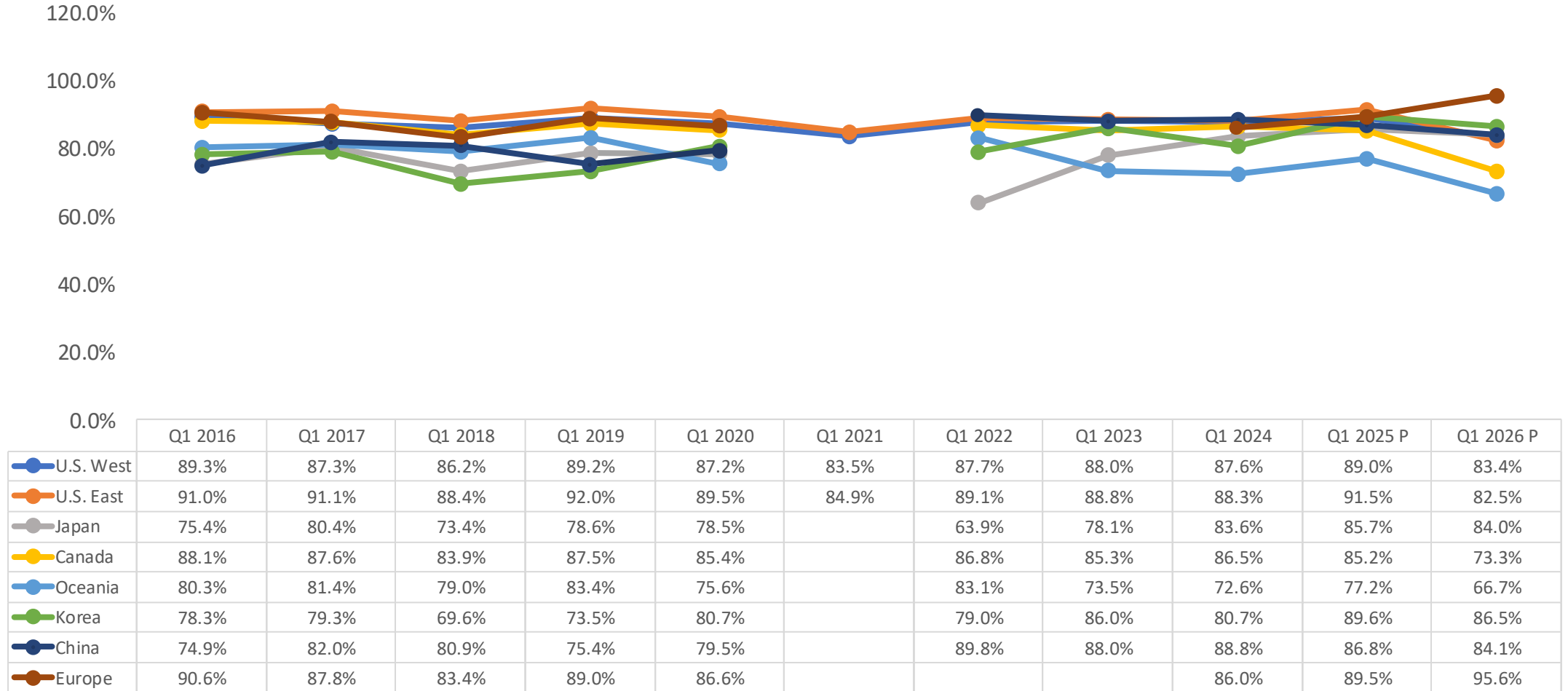
SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents from this visitor market.
- **Age:** Respondents from **U.S. West** (50-64) in this age group were more satisfied with their stay compared to seniors (65+) from this visitor market.
- **Household income:** Visitors from **Canada** (\$100K-\$150K) in this income bracket expressed a higher level of satisfaction with their stay than those in the upper income tier (\$150K+) from this visitor market.
- **Education:** College graduates from **U.S. West** were more satisfied with their trip than those without a college degree from this visitor market.
- **Travel party size:** Those who traveled to the state by themselves from **Canada** were more satisfied with their trip than were those in larger travel parties of three or more from this visitor market.

SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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

120.0%
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%



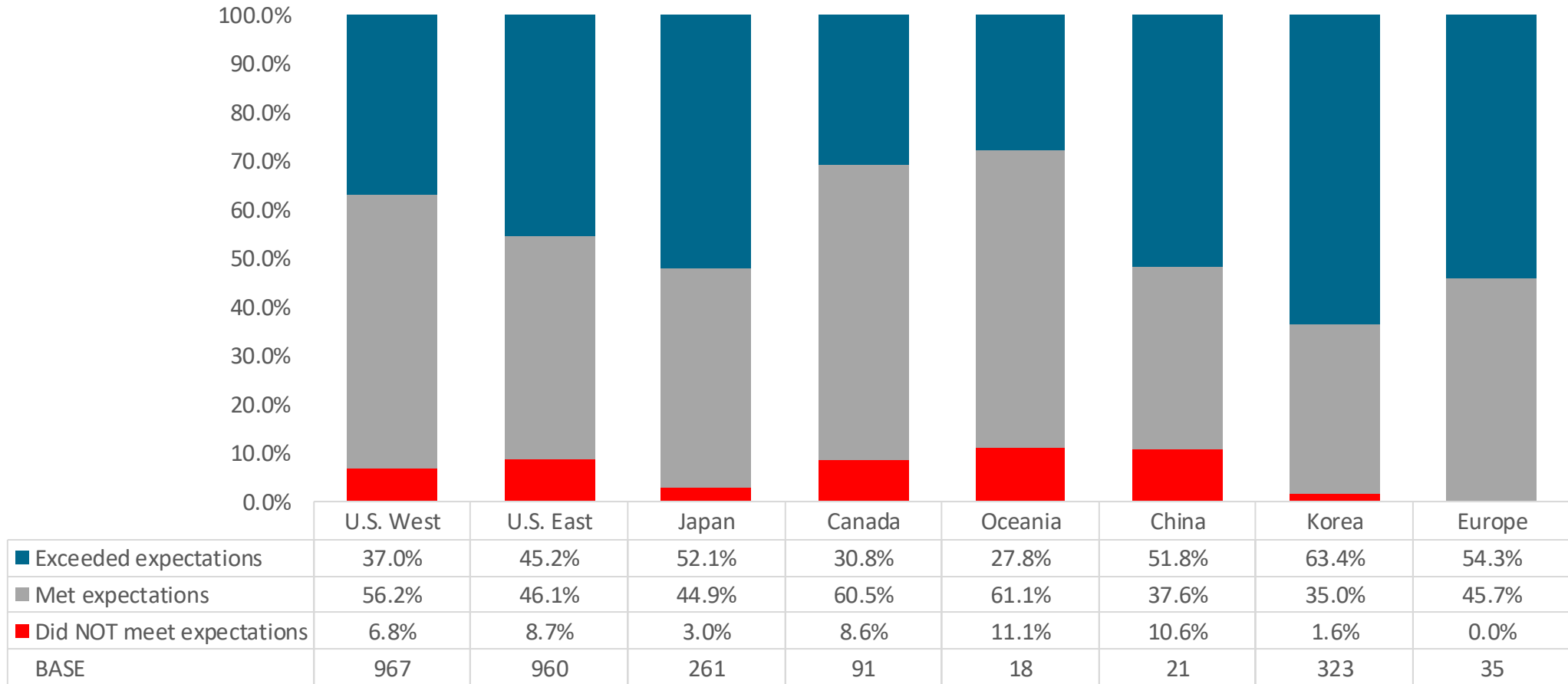
P= Preliminary Data

Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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



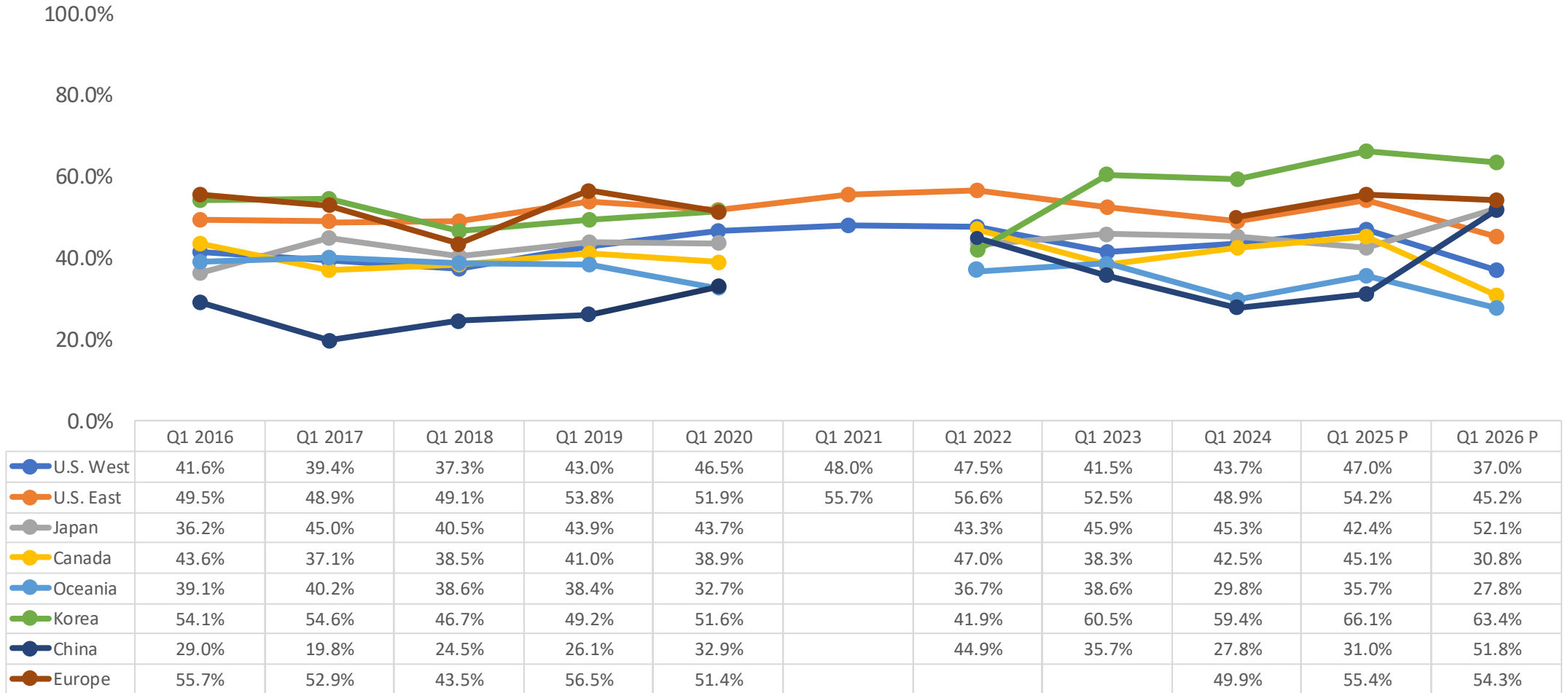
SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets were more likely to feel their trip exceeded their expectations than repeat visitors: **U.S. East** and **Japan**.
- ***Age:*** Younger respondents from **U.S. East** (<50) and **Japan** (18-34) were the most likely to respond that their trip exceeded expectations compared to visitors from these markets in older age groups. Seniors from **U.S. West** were the least likely to feel their trip exceeded expectations.
- ***Gender:*** Female visitors from **U.S. West** gave higher mean satisfaction scores compared to male visitors.
- ***Islands visited:*** Visitors from **U.S. West** whose trip was limited to a single island were more likely to feel their trip exceeded their expectations compared to those who stayed on multiple islands during their trip.
- ***Household income:*** Visitors from **U.S. West** who reside in homes in the lower income tier (<\$100K) were more likely to feel their trip exceeded their expectations than visitors that reside in more affluent households.

SATISFACTION - HAWAI‘I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

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



P= Preliminary Data

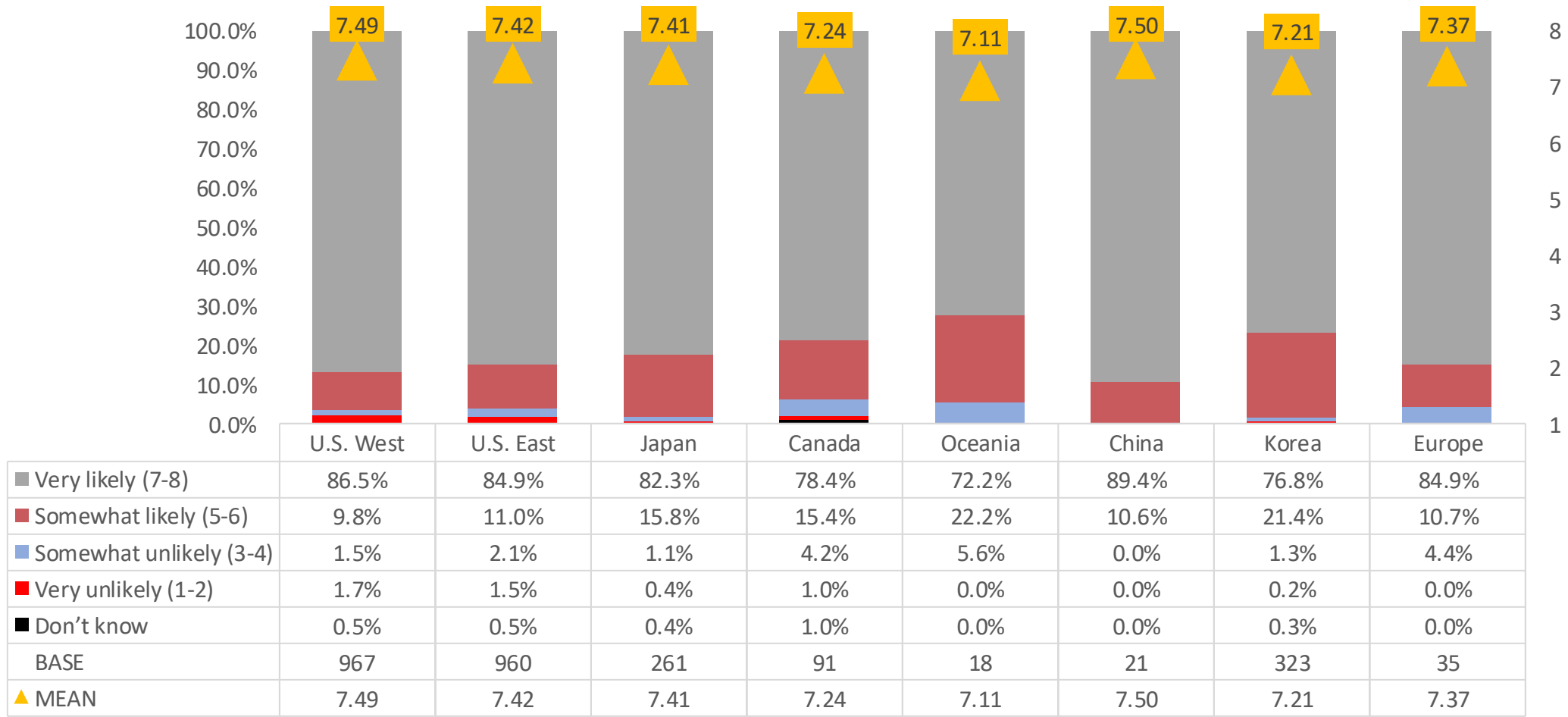
Q. Would you say this trip to Hawai‘i ___?

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

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

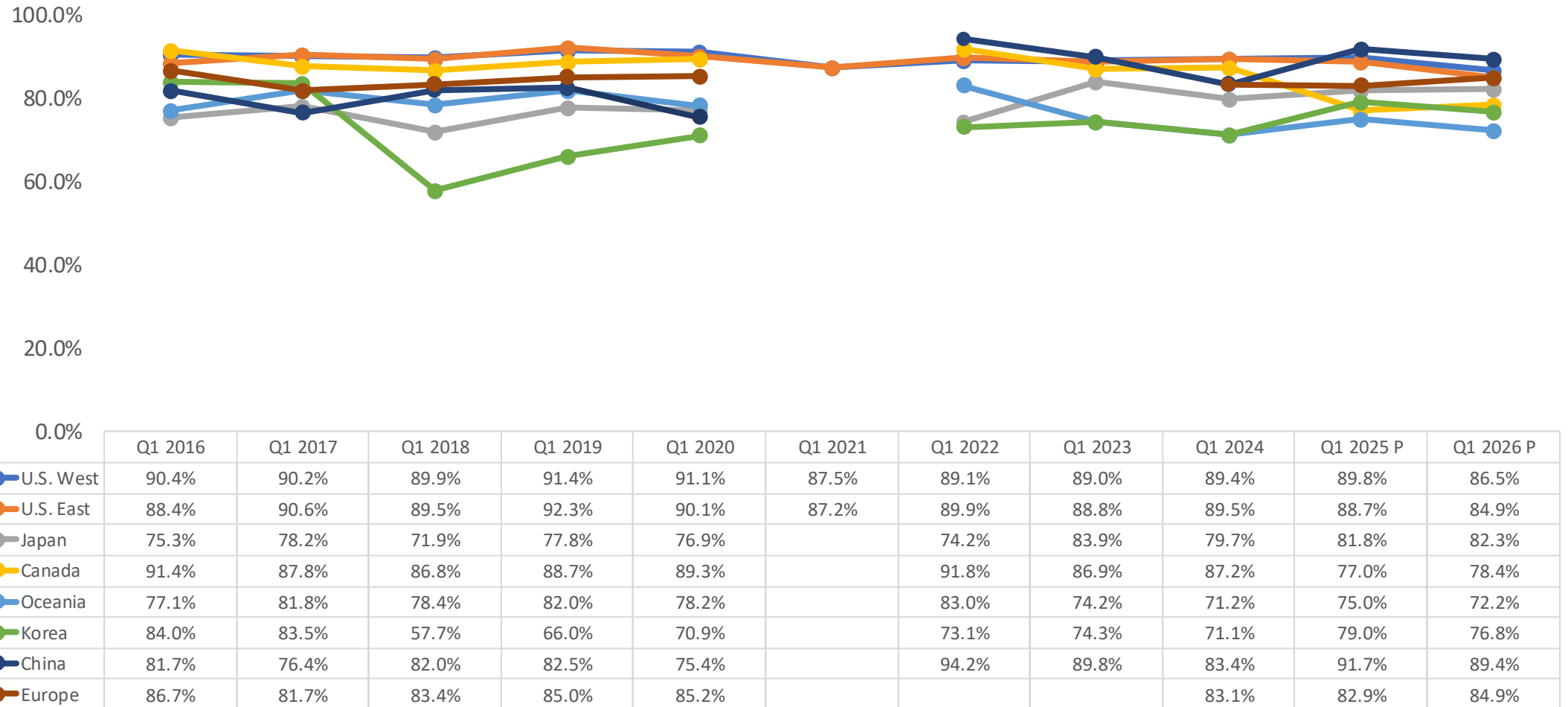


BRAND/ DESTINATION - ADVOCACY

- **Gender:** Females from **U.S. West** are more likely to recommend the state to others than males from this visitor market.
- **Trips to Hawai'i:** Repeat visitors from the following visitor markets expressed a greater likelihood of recommending the state than first-time visitors: **U.S. West** and **Canada**.
- **Household income:** Visitors from **U.S. West** who reside in homes in the bottom income tier (<\$100K) are the most likely to recommend the state to others.
- **Age:** Respondents from **Korea** (18-34) are the most likely to recommend the state to others compared to other age groups from this visitor market.

BRAND/ DESTINATION - ADVOCACY

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



P= Preliminary Data

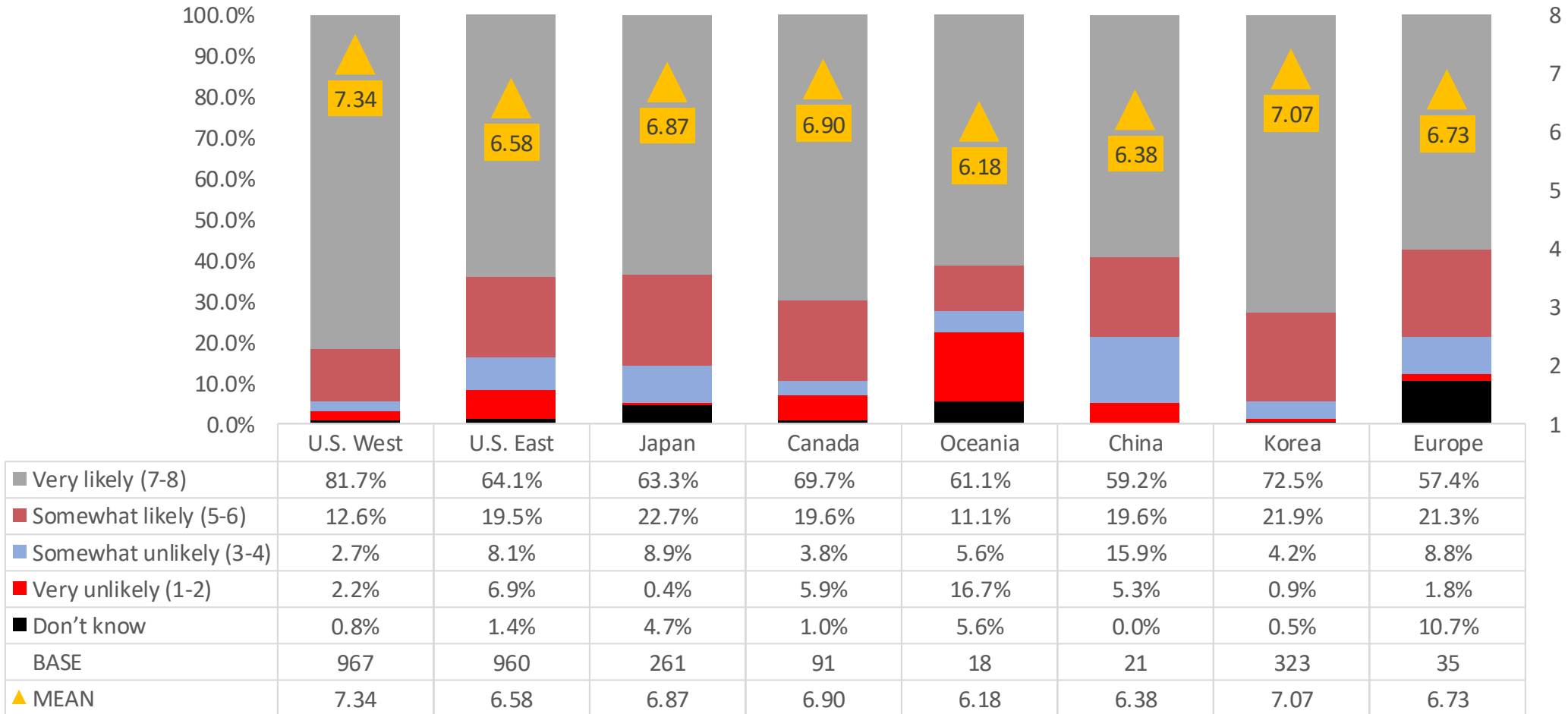
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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

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

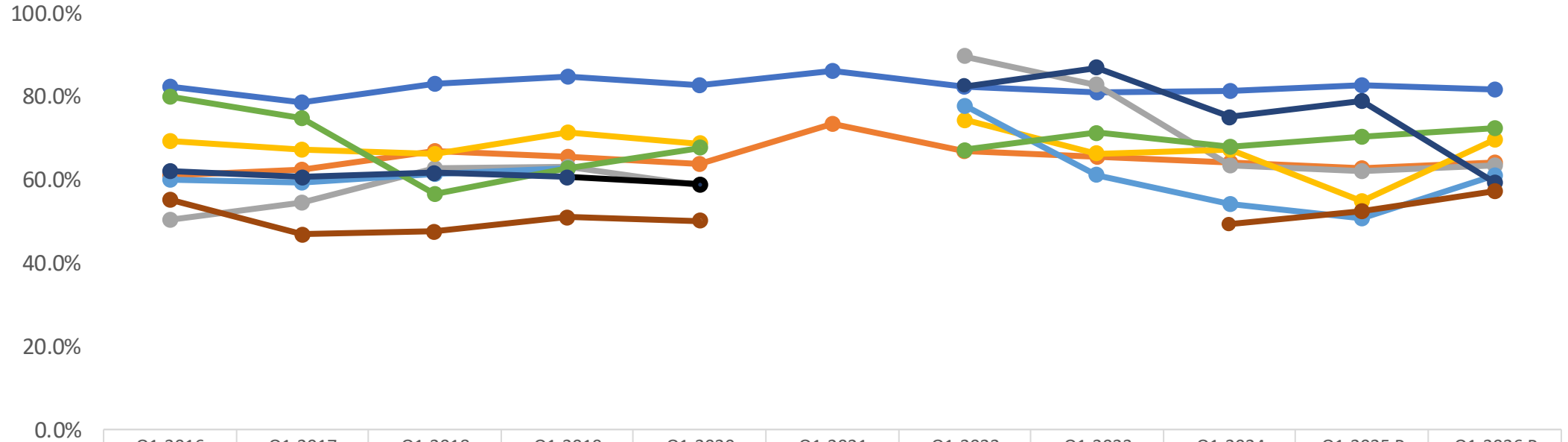


LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets expressed a greater likelihood of returning to the state in the next five years than first-time visitors: **U.S. West, U.S. East, Canada, and Japan.**
- ***Age:*** Visitors from **Japan** (50-64) in this age group expressed the greatest likelihood to return to the state in the next five years.
- ***Islands visited:*** Visitors from **U.S. West** and **U.S. East** whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than those who stayed on multiple islands during their stay.
- ***Household income:*** Visitors from **U.S. West** (\$150K+) who reside in homes in the upper income tier expressed a higher probability of returning to the state in the next five years than less affluent travelers from this market.

LIKELIHOOD OF RETURN VISIT

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	82.2%	78.5%	82.9%	84.7%	82.8%	86.2%	82.3%	81.1%	81.4%	82.7%	81.7%
U.S. East	61.0%	62.3%	66.8%	65.6%	63.8%	73.3%	66.8%	65.4%	64.3%	62.6%	64.1%
Japan	50.3%	54.4%	62.9%	63.0%	58.7%		89.7%	82.8%	63.3%	62.2%	63.3%
Canada	69.3%	67.1%	66.3%	71.5%	68.7%		74.3%	66.3%	67.4%	54.8%	69.7%
Oceania	60.1%	59.5%	61.5%	62.8%	56.0%		77.8%	61.1%	54.3%	50.7%	61.1%
Korea	79.9%	74.7%	56.5%	62.6%	67.7%		67.2%	71.2%	67.9%	70.4%	72.5%
China	62.2%	60.6%	61.6%	60.6%	58.9%		82.5%	86.9%	75.1%	78.9%	59.2%
Europe	55.1%	46.8%	47.5%	51.0%	50.2%				49.2%	52.4%	57.4%

P= Preliminary Data

Q. How likely are you to return to the state of Hawai'i in the next five years?

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.



UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Top Responses 10%+

Q1 2025 P	Q1 2026 P
47.9% High cost of travel 18.2% Preference for other destinations 11.8% Cultural and environmental concerns 10.4% Negative local interactions	51.6% High cost of travel 18.1% Unexpected events or conditions 18.1% Preference for other destinations

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Top Responses 10%+

Q1 2025 P	Q1 2026 P
41.5% High cost of travel 29.1% Preference for other destinations 24.9% Long travel distance 10.2% Health and personal limitations/ age	47.4% High cost of travel 23.9% Long travel distance 16.7% Preference for other destinations 16.6% Health and personal age limitations 11.4% Unexpected events or conditions

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Top Responses 10%+

Q1 2025*	Q1 2026 P**
34.2% High cost of travel 15.0% Financial constraints 15.0% Exchange rate	28.5% High cost of travel 11.2% Exchange rate

*Caution small base (n=21 respondents) in Q1 2025.

**Caution small base (n=35 respondents) in Q1 2026.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Top Responses 10%+

Q1 2025 P	Q1 2026 P*
45.2% Political climate 30.2% High cost of travel 12.0% Long travel distance 11.7% Travel restrictions or relations	45.2% High cost of travel 13.1% Unexpected events or conditions 13.1% Cultural and environmental concerns 13.1% Negative local interactions

*Caution small base (n=9 respondents) in Q1 2026.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Top Responses 10%+

Q1 2025 P*	Q1 2026 P**
48.4% High cost of travel 18.7% Preference for other destinations 13.1% Homeless and urban issues	80.0% High cost of travel 20.0% Health and personal limitations, age 20.0% Nothing new to see or do 20.0% Too commercialized and touristy

*Caution small base (n=28 respondents) in Q1 2025.

**Caution small base (n=5 respondents) in Q1 2026.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Top Responses 10%+

Q1 2025 P*	Q1 2026 P**
56.9% High cost of travel 16.5% Preference for other destinations	52.1% High cost of travel 14.7% Nothing new to see or do

*Caution small base (n=19 respondents) in Q1 2025.

**Caution small base (n=19 respondents) in Q1 2026.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Top Responses 10%+

Q1 2025 P*	Q1 2026 P**
100% No particular reason	25.0% High cost of travel 25.0% Health and personal limitations, age 25.0% Nothing new to see or do

*Caution small base (n=1 respondent) in Q1 2025.

**Caution small base (n=4) in Q1 2026.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

Top Responses 10%+

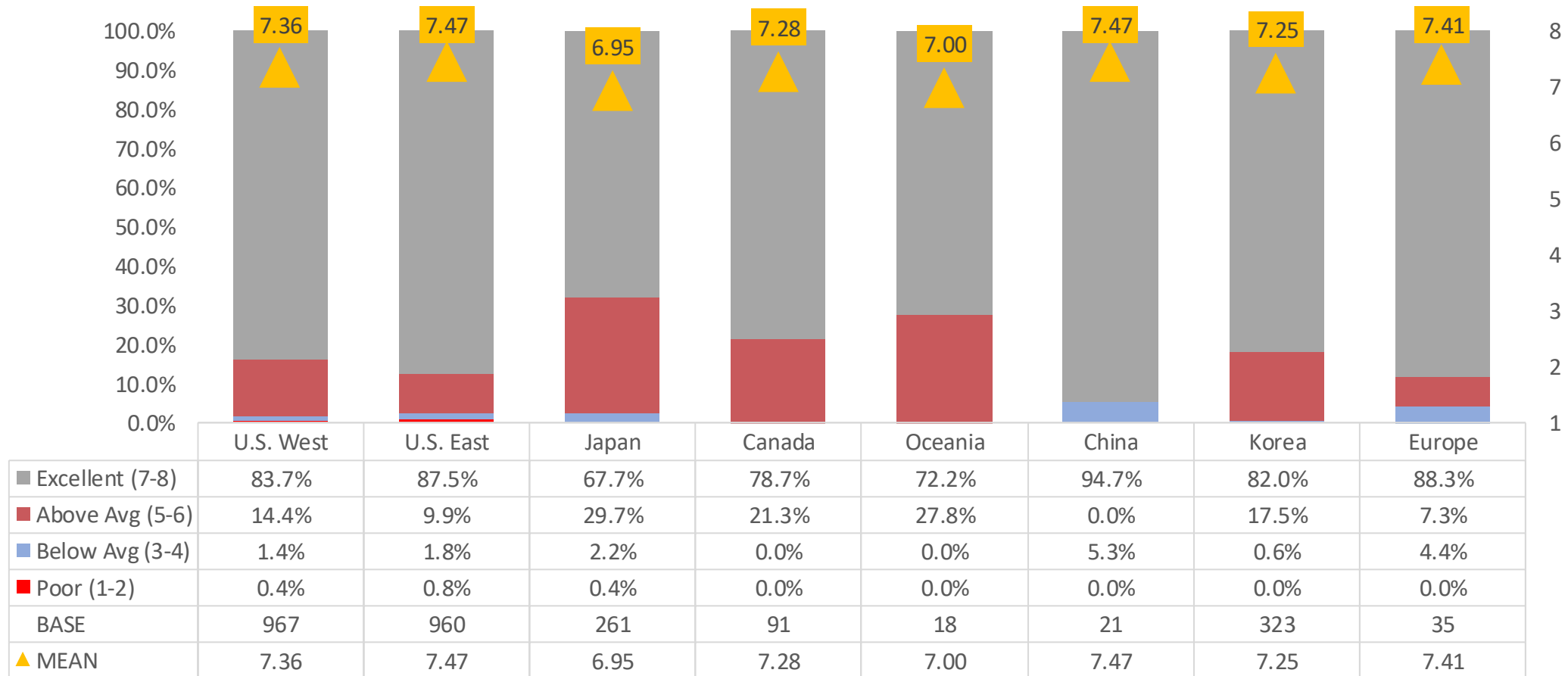
Q1 2025 P	Q1 2026 P*
44.7% Long travel distance 40.0% High cost of travel 15.2% Preference for other destinations	41.5% Long travel distance 29.3% High cost of travel 17.1% Travel restrictions or relations

*Caution small base (n=6 respondents) in Q1 2026.

P= Preliminary Data

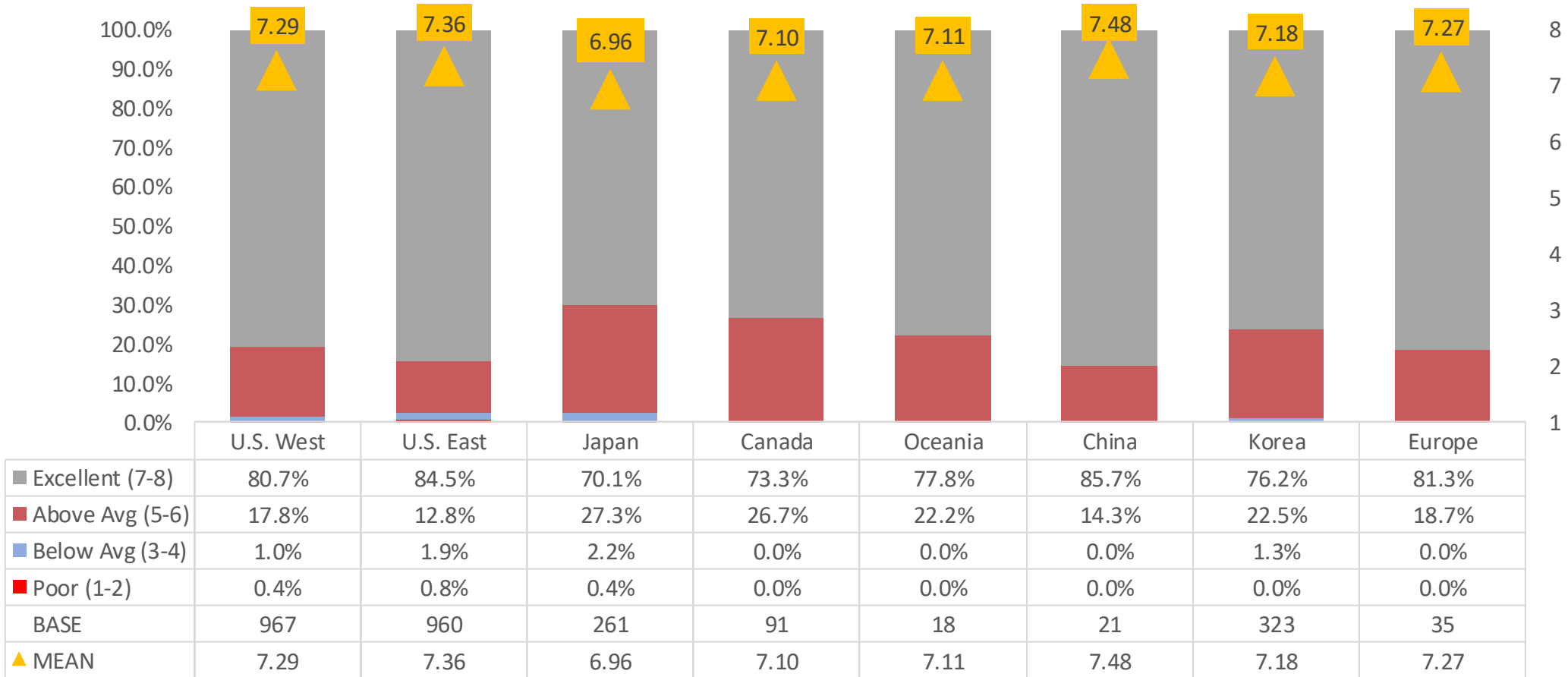
OFFERING A VARIETY OF EXPERIENCES

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



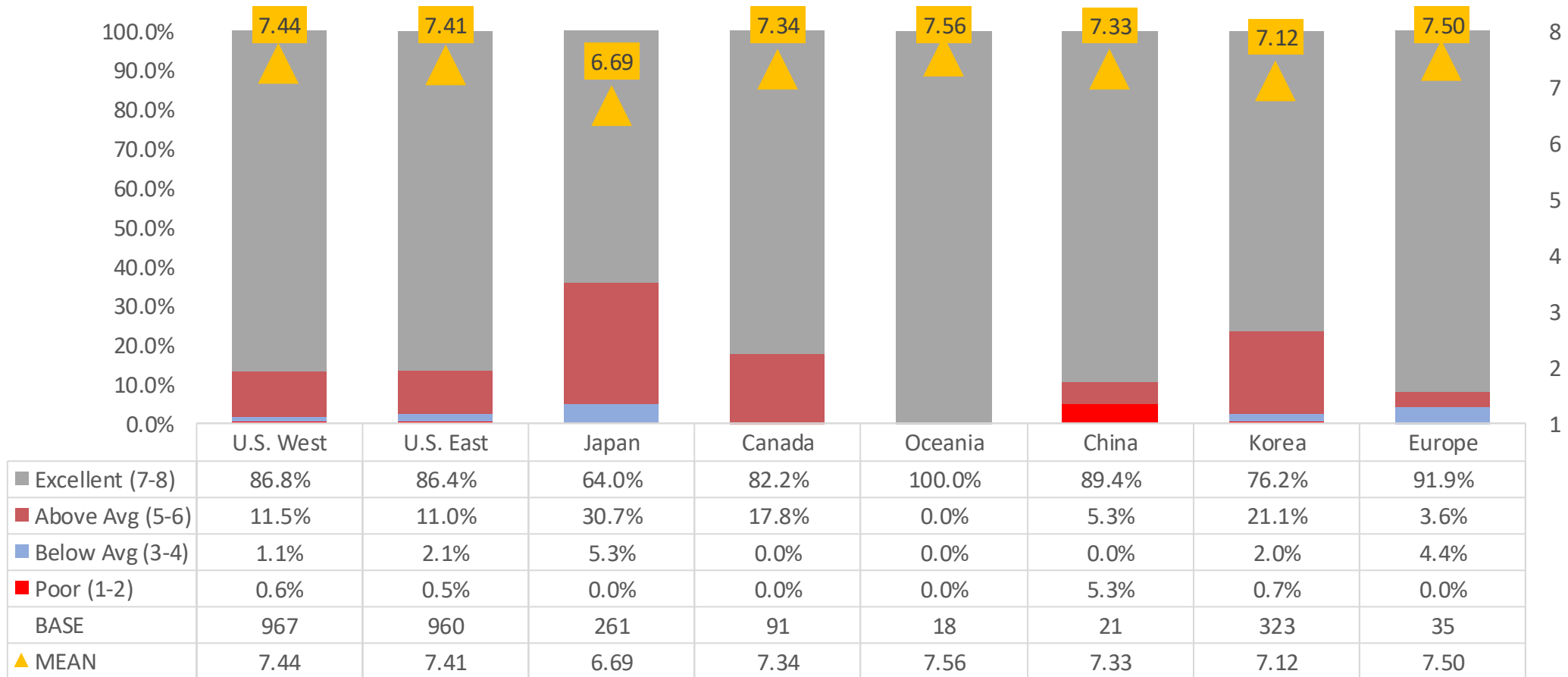
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



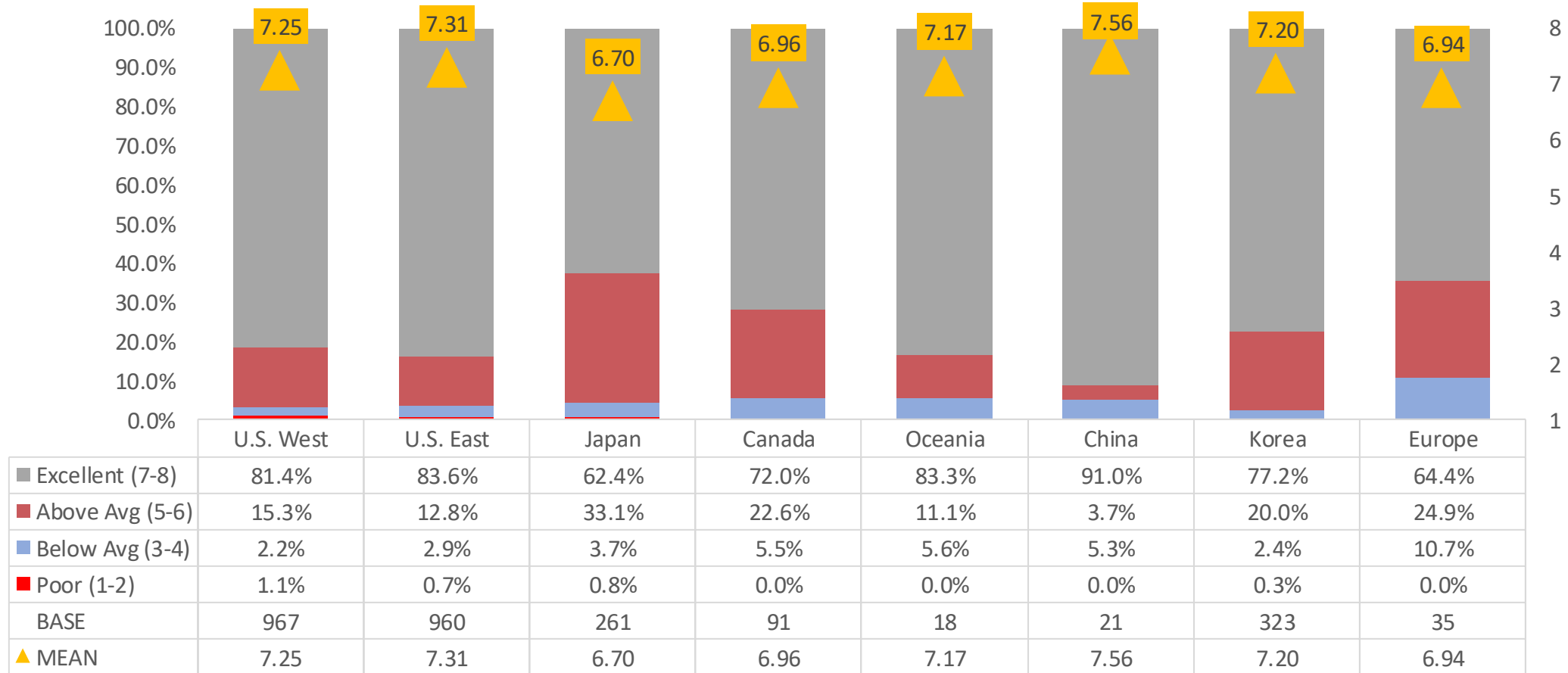
SAFE AND SECURE DESTINATION

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



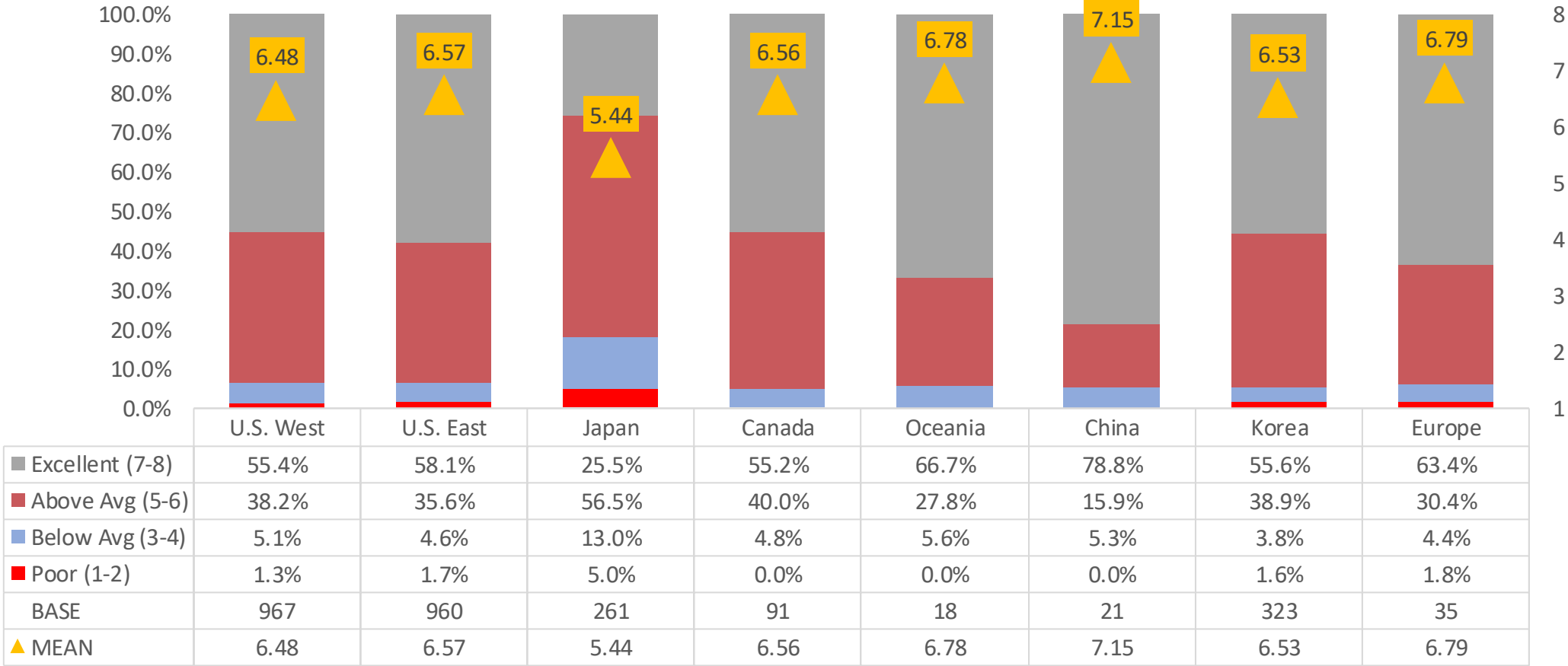
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Section 2 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.5%	98.5%	97.6%	97.5%	100.0%	100.0%	99.5%	100.0%
On own (self-guided)/ driving around island	84.1%	84.9%	80.2%	80.2%	58.8%	80.4%	82.2%	87.8%
Helicopter ride/ airplane tour	3.0%	5.7%	1.3%	1.1%	5.9%	0.0%	7.0%	20.5%
Boat tour/ submarine ride*/ whale watching	30.9%	41.4%	11.0%	27.0%	29.4%	62.4%	33.2%	45.7%
Visit towns/ communities	60.7%	62.8%	35.4%	59.3%	29.4%	50.2%	35.2%	67.4%
Private limousine/ van tour/ tour bus	7.3%	15.0%	13.1%	7.6%	35.3%	18.0%	13.8%	12.2%
Scenic views/ natural landmarks	68.5%	77.6%	21.5%	75.8%	70.6%	75.1%	65.1%	65.3%
Movie/ TV/ film location tours***	5.5%	8.9%	9.6%	9.0%	17.6%	27.0%	19.9%	4.2%
Train tours**	1.9%	1.1%	1.2%	0.0%	0.0%	9.0%	1.6%	0.0%

*This activity was not asked to Kaua'i visitors.

**This activity was not asked to Maui, Lāna'i, Moloka'i and Hawai'i Island visitors.

***This activity was not asked to Hawai'i Island visitors.

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.1%	95.0%	96.1%	100.0%	100.0%	100.0%	98.9%	97.9%
Beach/ sunbathing	76.7%	75.6%	78.5%	92.1%	58.8%	80.4%	84.9%	81.6%
Bodyboarding	6.3%	5.0%	1.6%	8.6%	11.8%	5.3%	4.8%	9.2%
Stand-up paddle boarding	3.6%	2.7%	1.7%	6.8%	5.9%	0.0%	3.6%	0.0%
Surfing	3.9%	2.4%	1.2%	10.0%	0.0%	3.7%	8.4%	0.0%
Canoe paddling	1.5%	1.5%	2.0%	2.1%	5.9%	0.0%	2.3%	2.1%
Kayaking	3.8%	3.4%	0.0%	1.1%	5.9%	0.0%	1.8%	2.1%
Swimming in the ocean	55.2%	52.2%	32.3%	76.9%	58.8%	49.8%	49.9%	60.2%
Snorkeling	34.0%	29.3%	10.9%	36.3%	23.5%	49.8%	48.2%	17.5%
Freediving	1.1%	1.2%	0.8%	2.1%	0.0%	9.0%	2.6%	0.0%
Windsurfing/ kitesurfing	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Jet skiing/ parasailing*	0.7%	0.8%	4.6%	2.9%	0.0%	0.0%	1.2%	0.0%
Scuba diving	2.8%	2.6%	0.4%	0.0%	0.0%	0.0%	0.8%	0.0%
Fishing	2.0%	2.8%	1.6%	1.1%	5.9%	10.6%	0.6%	0.0%
Golf	8.5%	7.4%	4.0%	10.7%	5.9%	0.0%	5.1%	5.0%
Running/ jogging/ fitness/ walking	42.4%	36.5%	14.8%	49.3%	35.3%	21.7%	25.7%	34.7%

*This activity was not asked to Kaua'i and Lāna'i visitors.

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	94.1%	95.0%	96.1%	100.0%	100.0%	100.0%	98.9%	97.9%
Cycling	2.9%	2.5%	0.8%	3.2%	0.0%	3.7%	1.1%	9.2%
Spa/ wellness	10.8%	9.4%	1.6%	3.2%	5.9%	0.0%	3.0%	12.2%
Hiking	34.5%	39.1%	29.3%	37.5%	23.5%	64.1%	31.3%	38.9%
Backpacking/ camping	0.3%	1.2%	0.8%	2.1%	5.9%	7.4%	3.3%	5.0%
Agritourism	17.6%	23.5%	8.5%	14.3%	11.8%	18.0%	19.0%	25.2%
Sports event or tournament	1.6%	1.6%	0.4%	1.1%	0.0%	7.4%	1.3%	0.0%
Parks/ botanical gardens	36.4%	47.2%	24.9%	34.9%	23.5%	48.2%	25.3%	44.8%
Waterparks*	0.4%	1.2%	0.8%	0.0%	0.0%	0.0%	2.7%	5.0%
Mountain tubing**	1.4%	1.9%	0.4%	2.1%	0.0%	11.1%	1.4%	2.1%
Waterfall rappel**	0.7%	1.8%	0.4%	1.5%	0.0%	0.0%	0.4%	7.1%
Ziplining***	2.2%	2.3%	0.0%	1.1%	0.0%	3.7%	0.4%	0.0%
Skydiving***	0.2%	0.4%	1.7%	0.0%	0.0%	0.0%	1.0%	2.1%
All-terrain vehicle (ATV)**	2.6%	3.1%	2.4%	3.6%	5.9%	9.0%	5.7%	5.0%
Horseback riding	1.1%	0.6%	2.8%	1.1%	0.0%	9.0%	0.7%	4.2%
Tennis/ pickleball	3.4%	2.1%	0.0%	3.2%	0.0%	3.7%	0.4%	0.0%

*This activity was not asked to Hawai'i Island and Moloka'i visitors.

This activity was not asked to Lāna'i and Moloka'i visitors. *This activity was not asked to Moloka'i visitors

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	98.5%	98.6%	98.0%	100.0%	100.0%	100.0%	99.0%	95.0%
Lunch/ sunset/ dinner/ evening cruise	18.6%	25.2%	16.9%	17.4%	35.3%	60.8%	34.7%	31.7%
Concert/ Live music/ stage show	14.2%	19.1%	15.0%	18.1%	11.8%	14.3%	16.6%	19.3%
Nightclub/ dancing/ bar/ karaoke*	7.5%	8.9%	2.4%	4.3%	0.0%	9.0%	3.2%	14.2%
Fine dining	51.7%	54.5%	39.1%	50.3%	41.2%	35.9%	42.4%	41.8%
Family restaurant	73.1%	73.8%	29.9%	77.7%	94.1%	42.9%	50.1%	45.1%
Fast food	37.4%	39.0%	63.0%	51.0%	82.4%	67.7%	57.5%	33.8%
Food truck	42.5%	41.4%	26.1%	54.7%	35.3%	18.0%	56.7%	48.1%
Café/ coffee house	50.3%	47.7%	50.2%	62.2%	64.7%	39.2%	66.2%	61.1%
Ethnic dining	24.5%	31.0%	4.5%	19.5%	11.8%	23.3%	17.3%	4.2%
Farm-to-table cuisine	16.8%	17.7%	11.2%	16.2%	0.0%	10.6%	2.3%	2.1%
Prepared own meal	51.2%	40.4%	20.0%	63.9%	11.8%	32.3%	22.0%	43.0%

*This activity was not asked to Lānaʻi visitors.

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	97.8%	97.8%	98.4%	100.0%	100.0%	100.0%	98.9%	100.0%
Malls/ department stores**	47.0%	45.6%	86.9%	72.7%	70.6%	100.0%	78.3%	64.4%
Designer boutiques***	22.1%	26.1%	14.7%	28.8%	35.3%	21.7%	5.2%	21.4%
Hotel/ resort stores	45.2%	48.9%	38.0%	43.5%	52.9%	39.6%	45.0%	41.8%
Swap meet/ flea market*	17.9%	15.9%	4.8%	29.5%	35.3%	9.0%	7.4%	5.0%
Discount/ outlet stores**	22.0%	24.1%	26.7%	32.0%	70.6%	25.3%	54.8%	18.4%
Supermarkets	67.4%	63.3%	64.5%	77.3%	58.8%	59.2%	68.0%	78.6%
Farmer's market	34.8%	32.9%	13.5%	41.0%	23.5%	18.0%	8.9%	28.8%
Convenience stores	46.0%	51.0%	50.5%	59.7%	88.2%	60.8%	55.8%	35.9%
Duty-free stores*	1.8%	3.2%	16.4%	4.0%	5.9%	21.7%	21.0%	2.1%
Hawai'i-made products	51.8%	57.2%	16.4%	57.6%	29.4%	41.2%	28.9%	45.1%
Local shops and artisans	63.3%	65.5%	7.2%	62.9%	41.2%	48.2%	21.6%	64.4%
Local agriculture products	44.5%	51.5%	18.6%	47.8%	17.6%	35.9%	35.3%	63.2%
Local fashion designers	9.6%	9.6%	1.2%	11.5%	5.9%	0.0%	2.1%	11.3%

*This activity was not asked to Hawai'i Island and Lāna'i visitors.

**This activity was not asked to Lāna'i and Moloka'i visitors.

***This activity was not asked to Moloka'i visitors.

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	72.6%	84.2%	67.6%	79.1%	88.2%	85.7%	72.0%	88.7%
Historic military sites and museums*	17.3%	31.5%	11.3%	33.9%	52.9%	35.9%	24.0%	34.4%
Historic Hawaiian sites and museums	40.1%	50.8%	19.1%	41.0%	35.3%	71.4%	17.9%	50.1%
Other historical sites, museums, and homes	14.7%	20.2%	8.4%	15.8%	23.5%	35.5%	24.0%	22.6%
Art museums*	4.1%	4.0%	5.3%	2.1%	5.9%	24.9%	4.4%	9.2%
Art galleries and exhibitions***	16.5%	16.8%	6.4%	9.0%	11.8%	10.6%	5.7%	14.2%
Lū'au/ Polynesian show/ hula show**	19.1%	35.3%	8.7%	30.2%	41.2%	12.7%	20.6%	28.5%
Lesson- ex. ukulele, hula, canoe paddling, lei making	4.4%	5.8%	4.8%	5.4%	0.0%	9.0%	5.2%	2.1%
Play/ Theatre/ Performing arts	3.6%	4.4%	8.6%	4.7%	5.9%	0.0%	9.5%	0.0%
Art/ craft fair**	17.7%	15.4%	6.1%	8.6%	0.0%	30.2%	5.2%	6.2%
Public art****	10.9%	13.1%	7.3%	13.0%	5.9%	18.0%	7.7%	21.4%
Festival/ event	4.5%	5.3%	3.2%	4.3%	0.0%	0.0%	3.6%	0.0%

*This activity was not asked to Hawai'i Island and Moloka'i visitors.

**This activity was not asked to Lāna'i visitors.

This activity was not asked to Moloka'i visitors. *This activity was not asked to Lāna'i and Moloka'i visitors

ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	93.7%	95.1%	96.9%	97.5%	100.0%	100.0%	97.1%	97.9%
Airport shuttle***	14.2%	16.9%	19.8%	13.4%	64.7%	39.2%	18.8%	22.6%
Trolley**	2.2%	3.5%	47.6%	4.3%	11.8%	10.6%	23.6%	0.0%
Public bus	6.2%	7.3%	34.1%	19.0%	17.6%	39.6%	21.7%	19.3%
Tour bus/ tour van	8.7%	15.5%	16.3%	9.8%	29.4%	28.6%	28.8%	17.2%
Taxi/ limousine	7.6%	9.7%	28.7%	19.4%	47.1%	30.6%	27.3%	28.5%
Rental car	72.0%	73.2%	23.8%	68.0%	47.1%	69.4%	55.7%	59.3%
Ride share	20.2%	22.9%	20.6%	32.4%	47.1%	19.6%	19.9%	18.4%
Car share	4.4%	2.6%	2.9%	2.1%	5.9%	3.7%	2.5%	2.1%
Bicycle rental**	1.6%	2.0%	1.2%	3.6%	0.0%	5.3%	0.5%	4.2%
Skyline rail*	1.1%	0.7%	3.5%	3.2%	0.0%	5.3%	1.0%	0.0%

*Option shown only to O'ahu visitors.

**This activity was not asked to Hawai'i Island, Moloka'i and Lāna'i visitors.

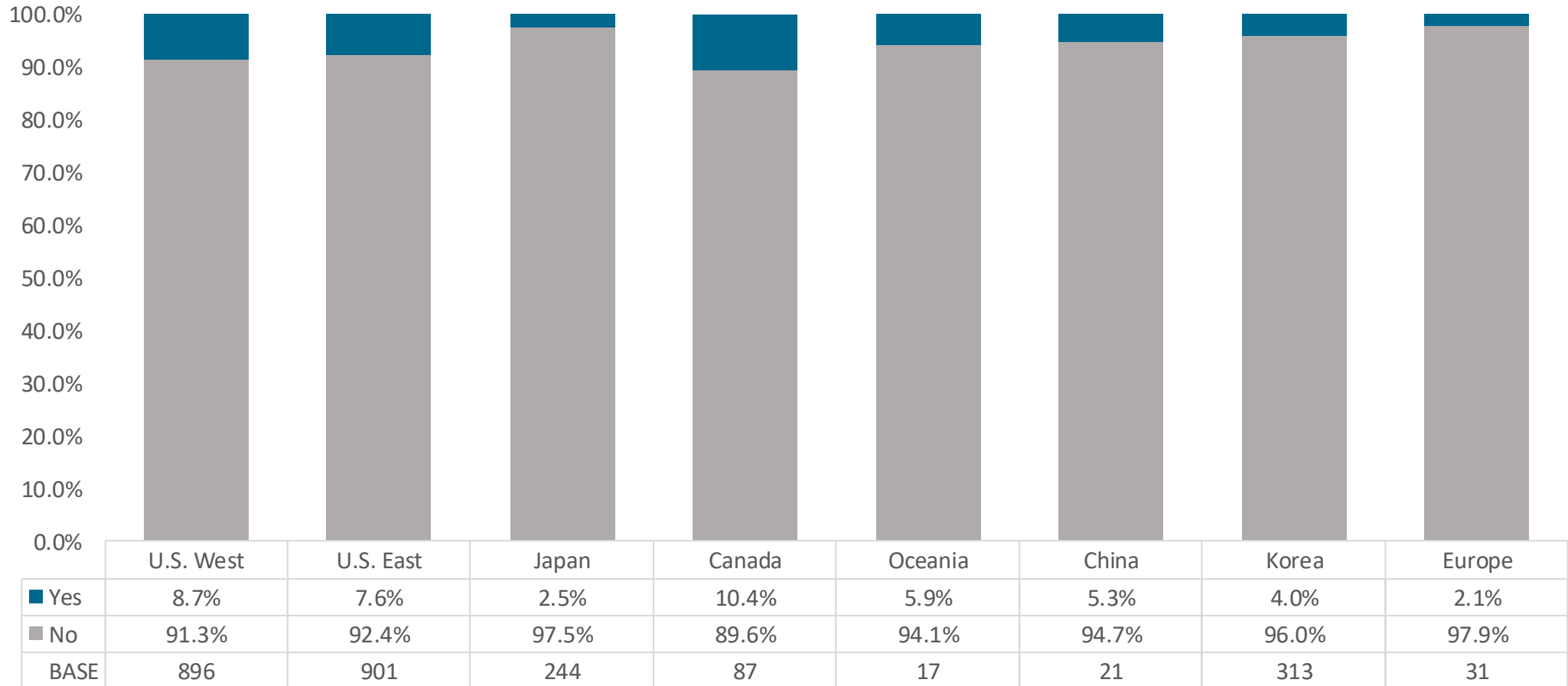
***This activity was not asked to Moloka'i visitors.

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
TOTAL	37.9%	32.6%	13.8%	39.5%	23.5%	7.4%	18.3%	19.6%
Visiting friends/ family	29.8%	24.1%	11.0%	29.7%	11.8%	3.7%	14.4%	15.4%
Volunteering/ giving back to the local community	3.4%	3.0%	0.4%	8.3%	0.0%	0.0%	1.4%	0.0%
Health and wellness activities	10.3%	10.6%	3.3%	6.8%	11.8%	3.7%	3.3%	15.4%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

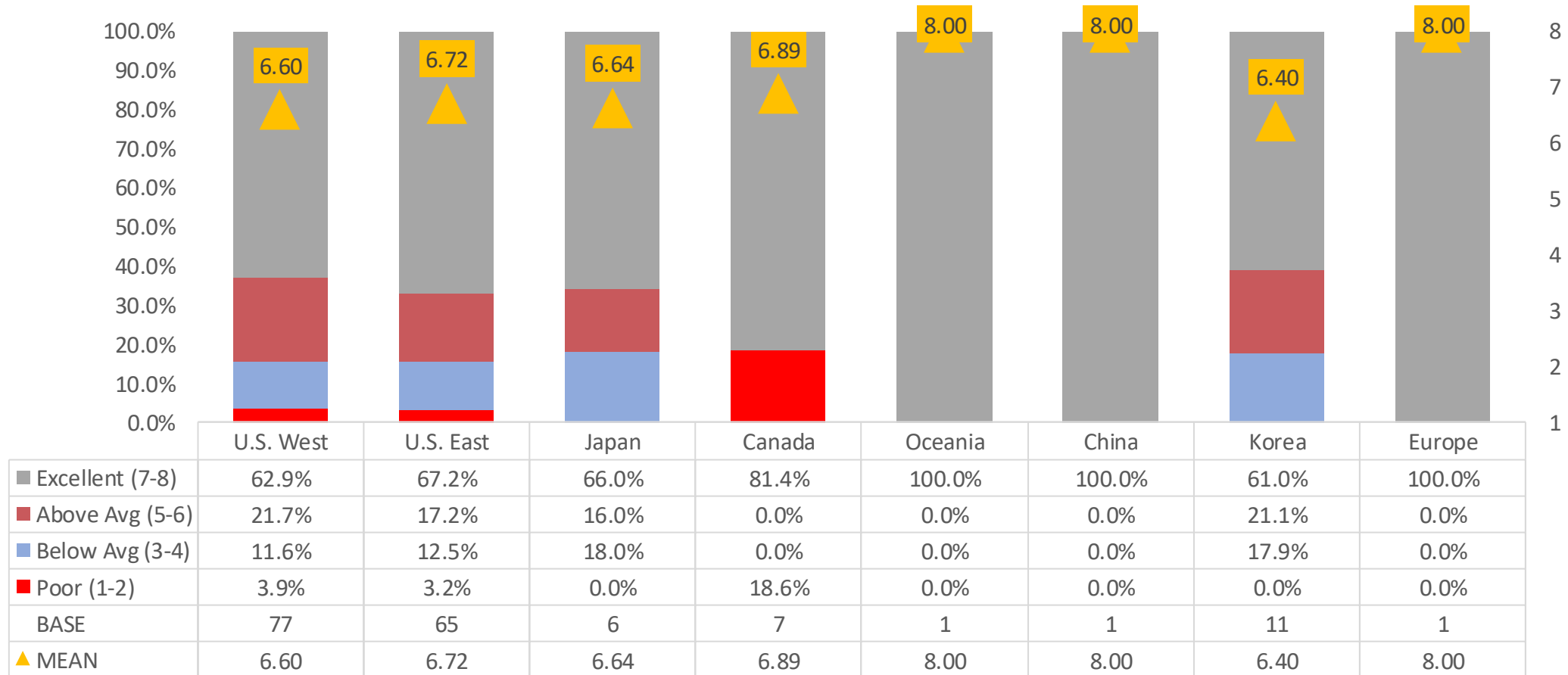


DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Mobility aid	73.5%	73.9%	0.0%	55.1%	100.0%	0.0%	27.6%	0.0%
Personal assistance	22.3%	21.7%	18.0%	24.3%	0.0%	0.0%	33.1%	100.0%
NA- No one needed assistance	4.3%	7.4%	63.9%	10.3%	0.0%	100.0%	30.4%	0.0%
Disabled parking/ placard	4.9%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Orientation and Mobility Assistance	3.7%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	3.7%	1.4%	0.0%	10.3%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	1.2%	4.4%	0.0%	0.0%	0.0%	0.0%	17.9%	0.0%
Service/ assistance animal	2.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Respiratory equipment	1.2%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lift equipped van	0.0%	2.8%	18.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Print material in alternate format	1.2%	0.0%	18.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ambulance/ Hospital/ Medical visit	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	80	69	6	9	1	1	13	1

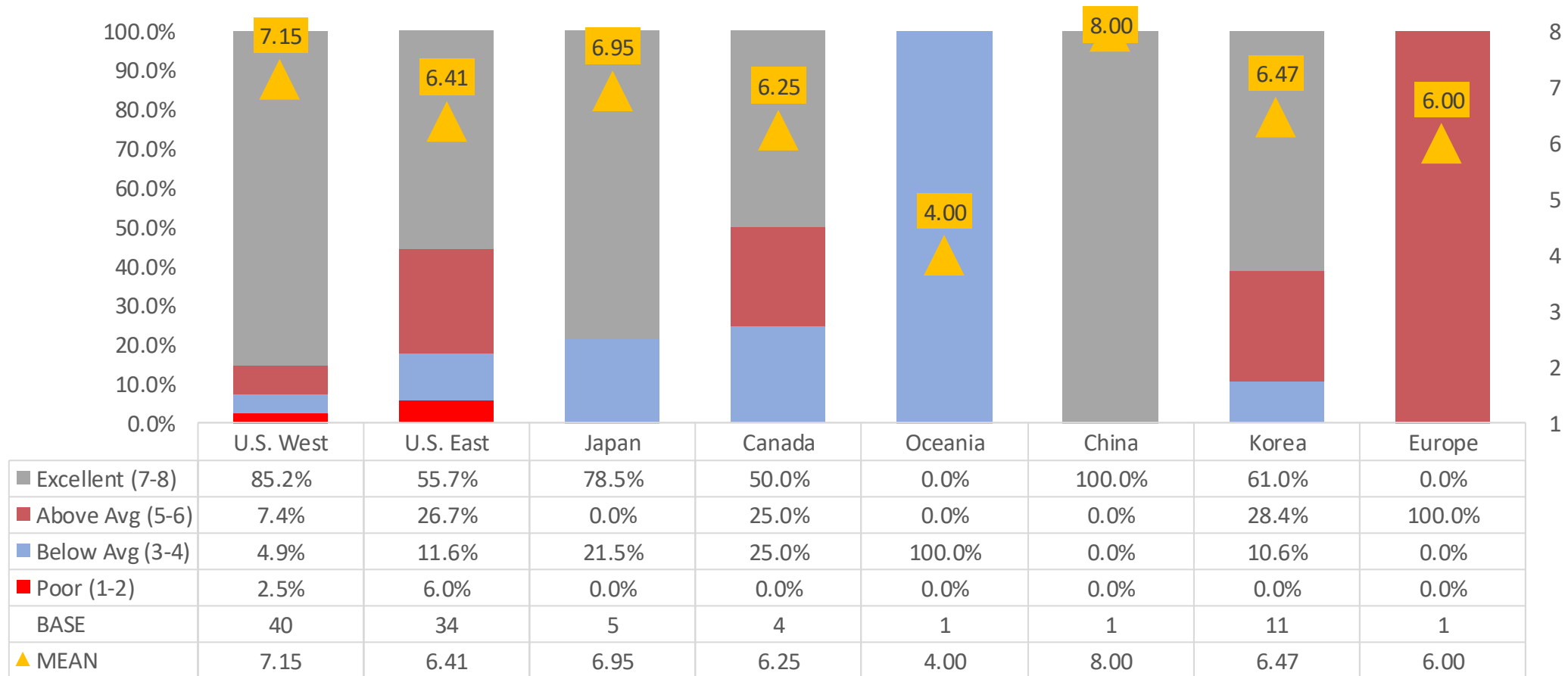
OVERALL ACCESSIBILITY - AIRPORTS

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



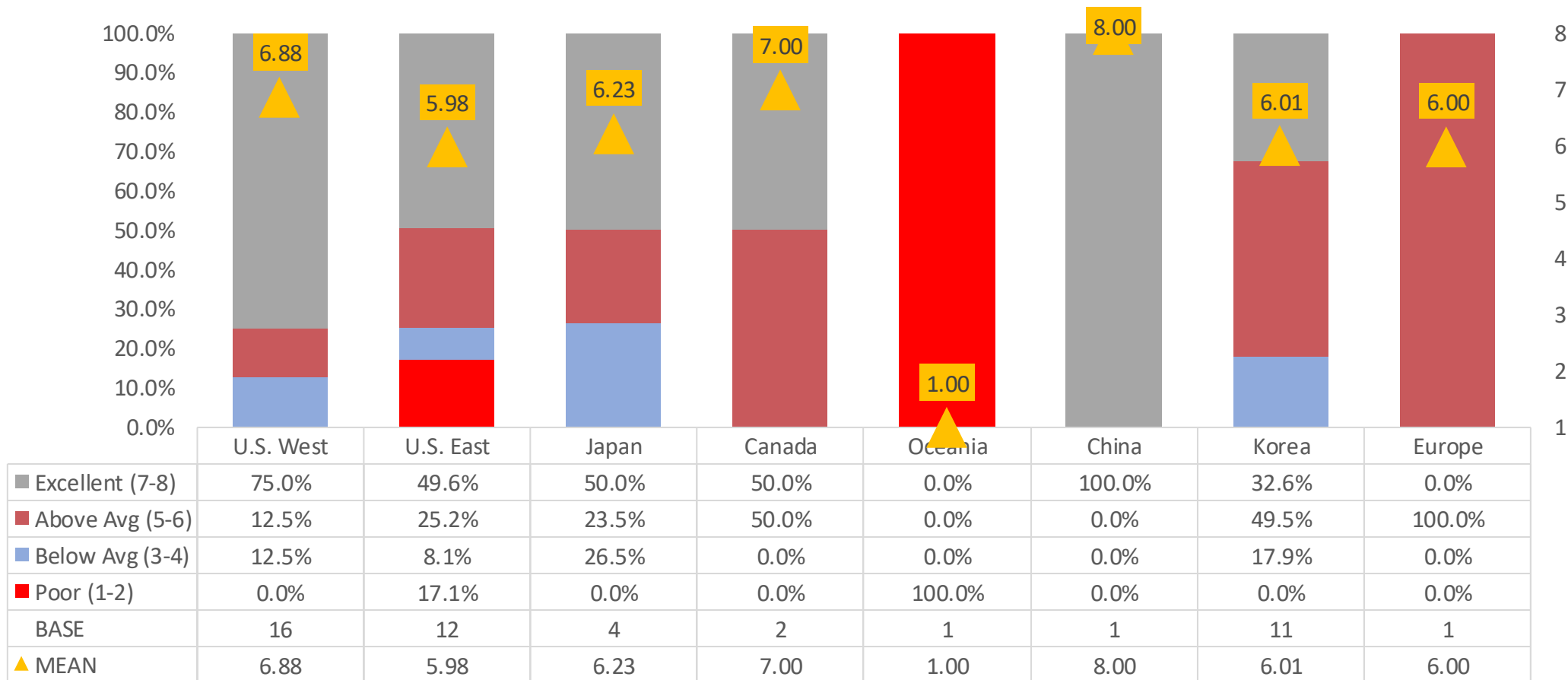
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



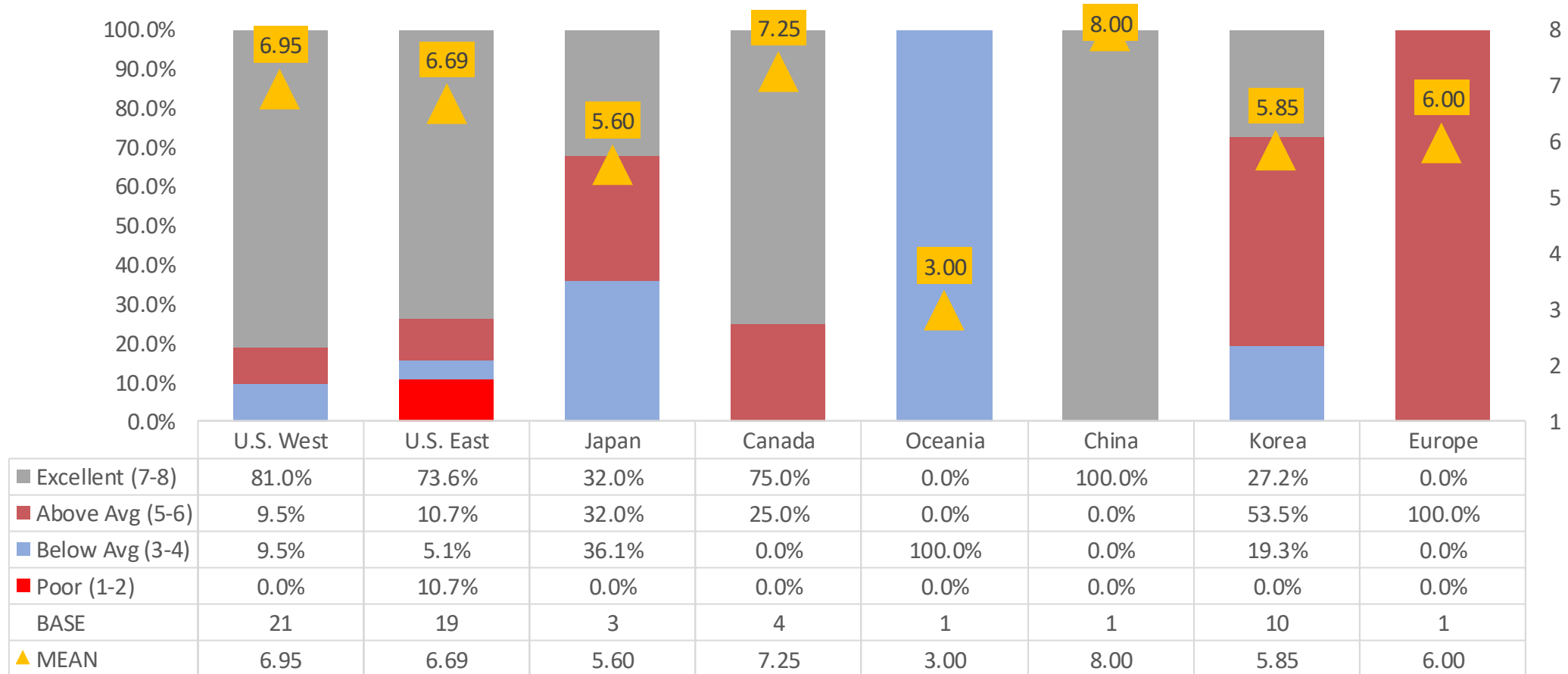
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



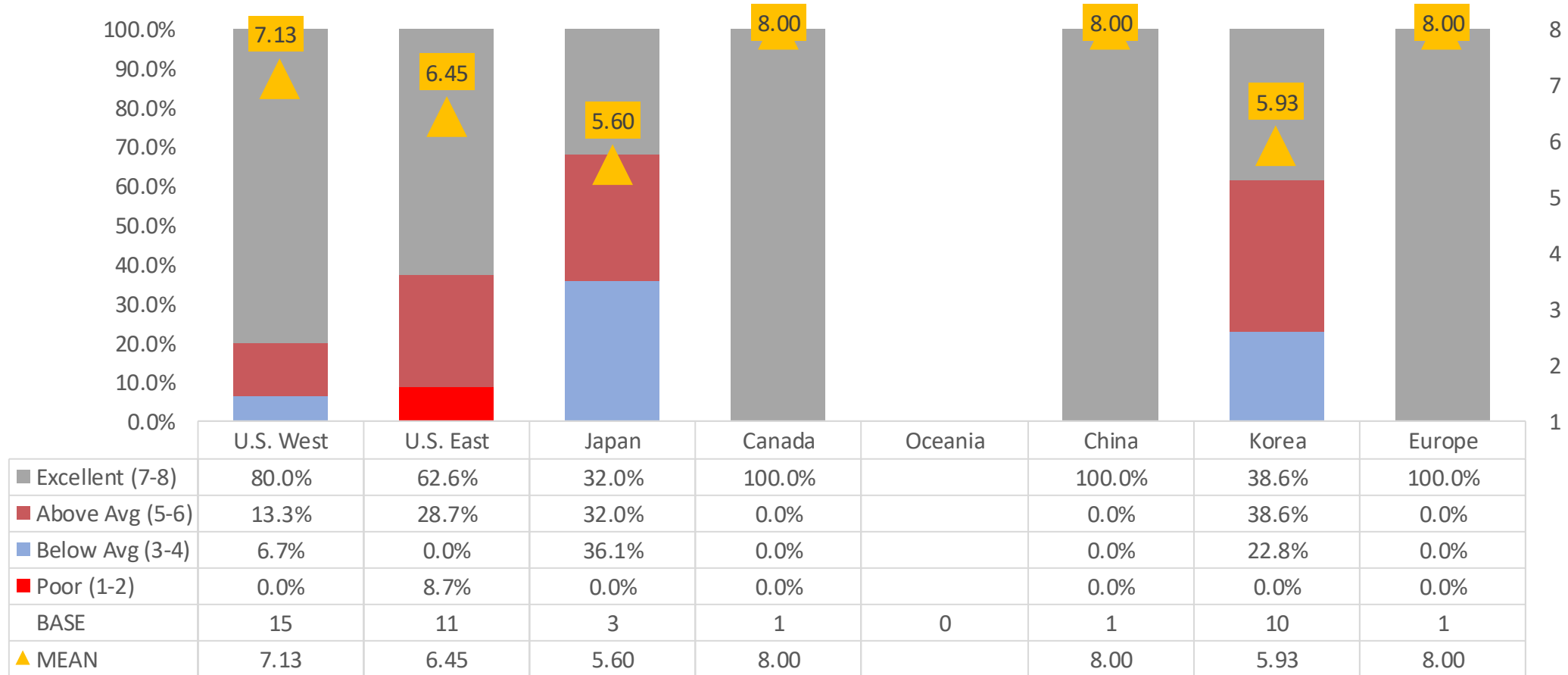
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



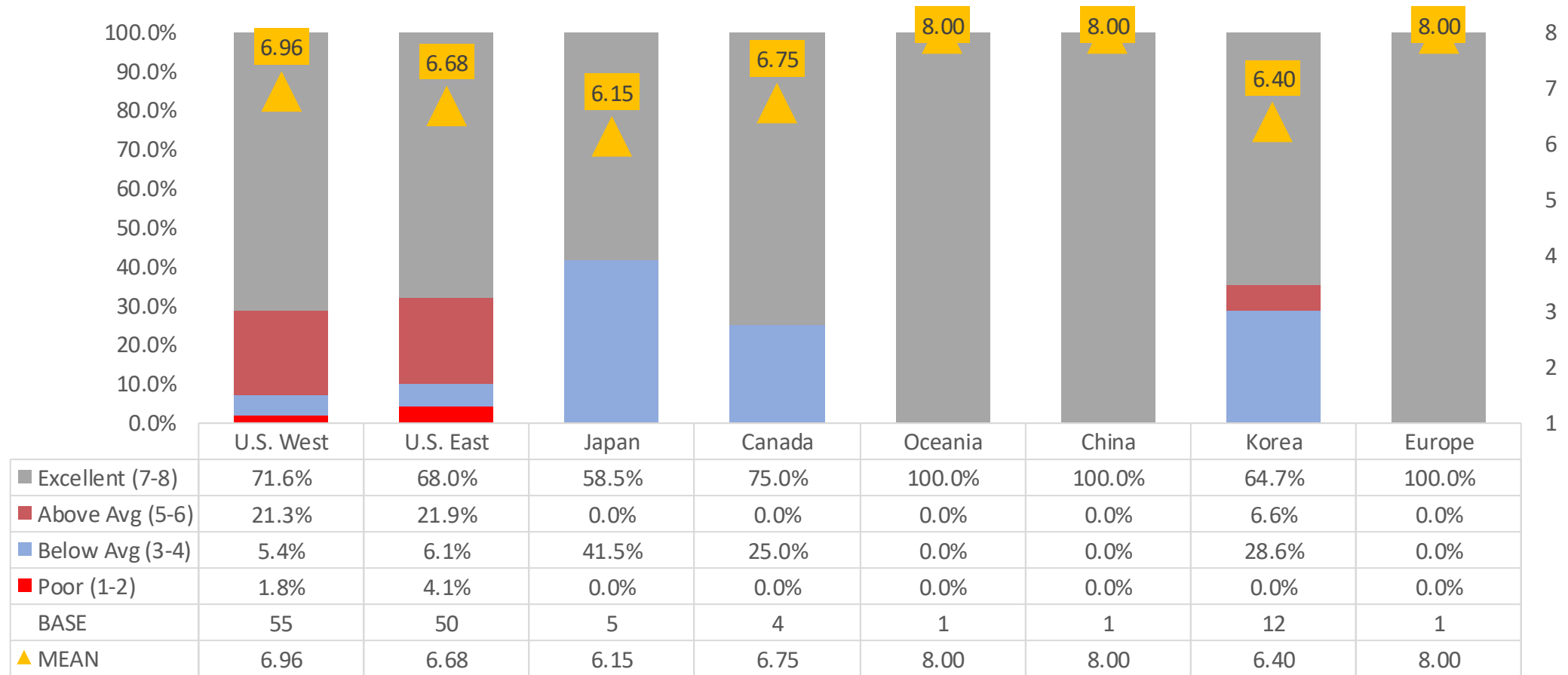
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



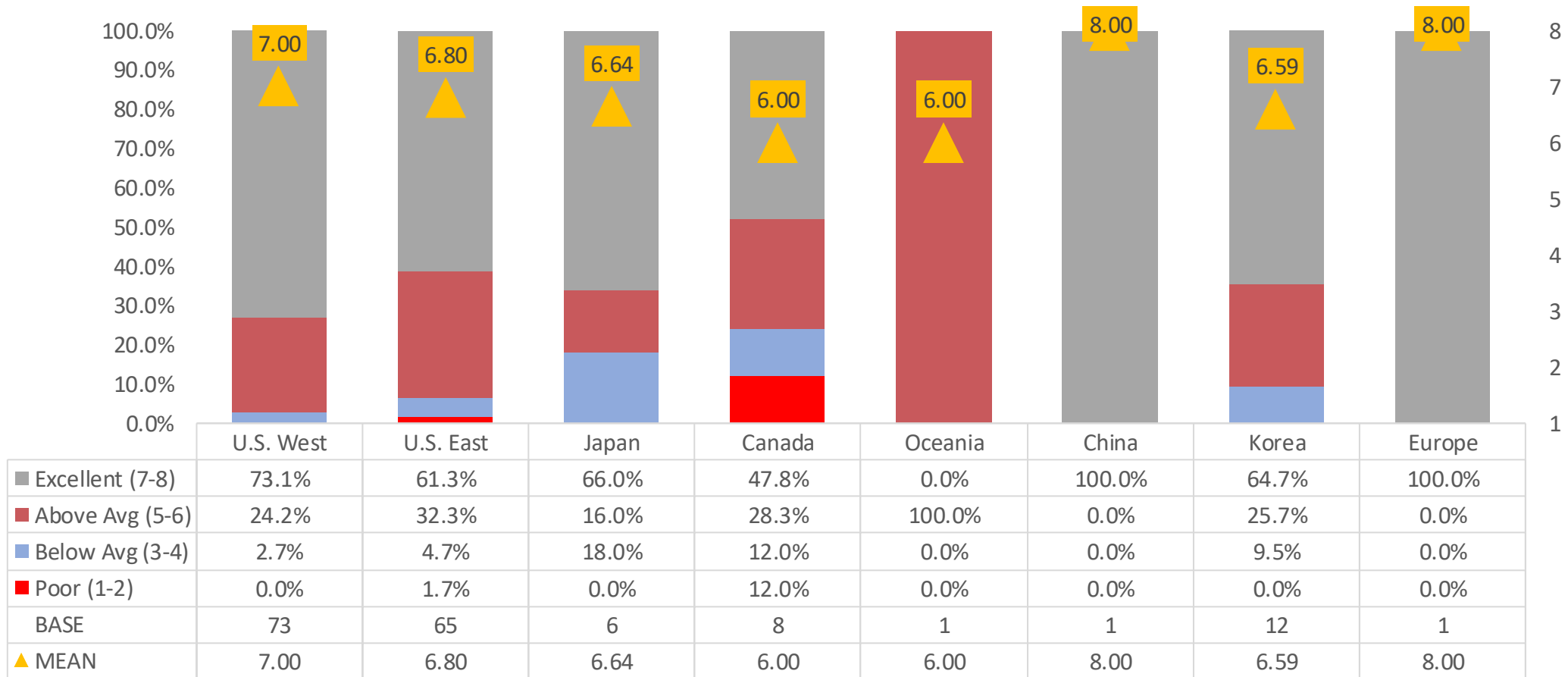
OVERALL ACCESSIBILITY - HOTELS

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



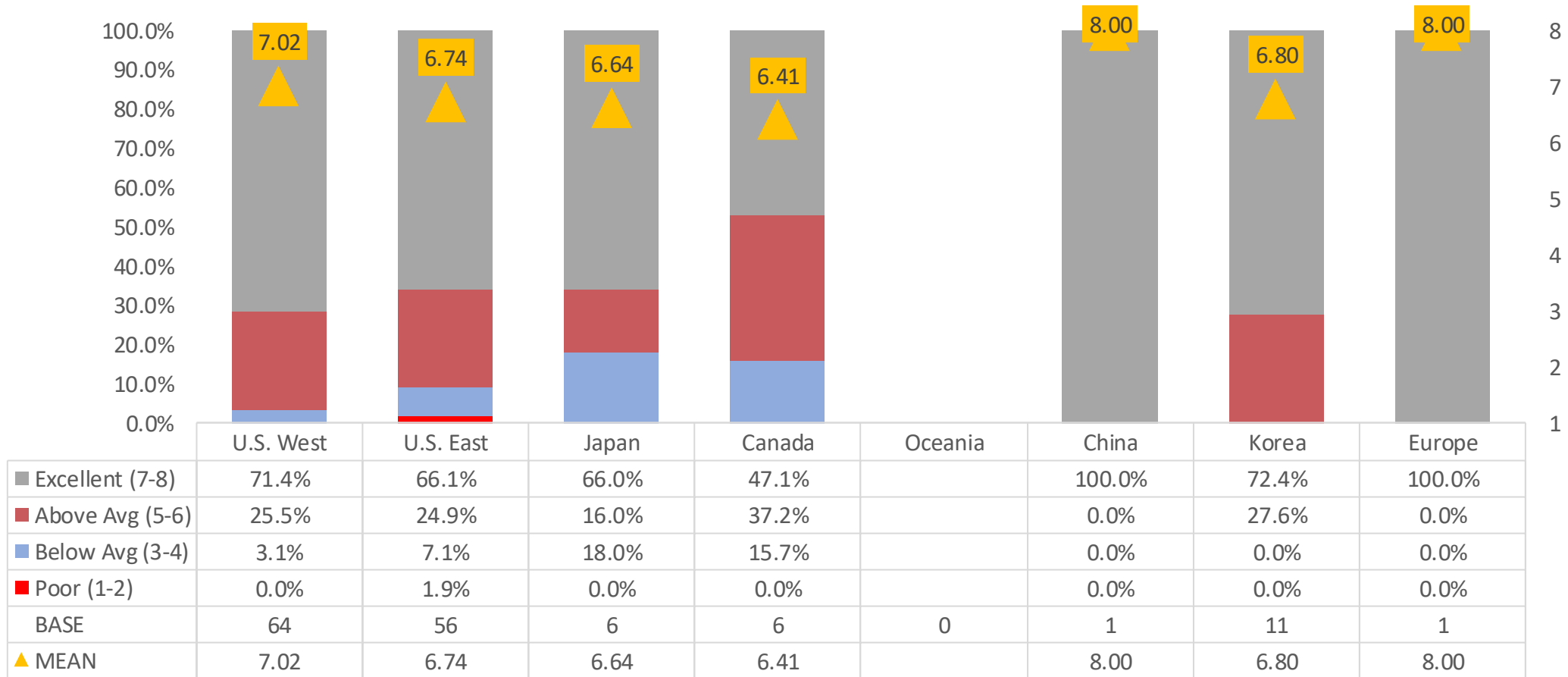
OVERALL ACCESSIBILITY - RESTAURANTS

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



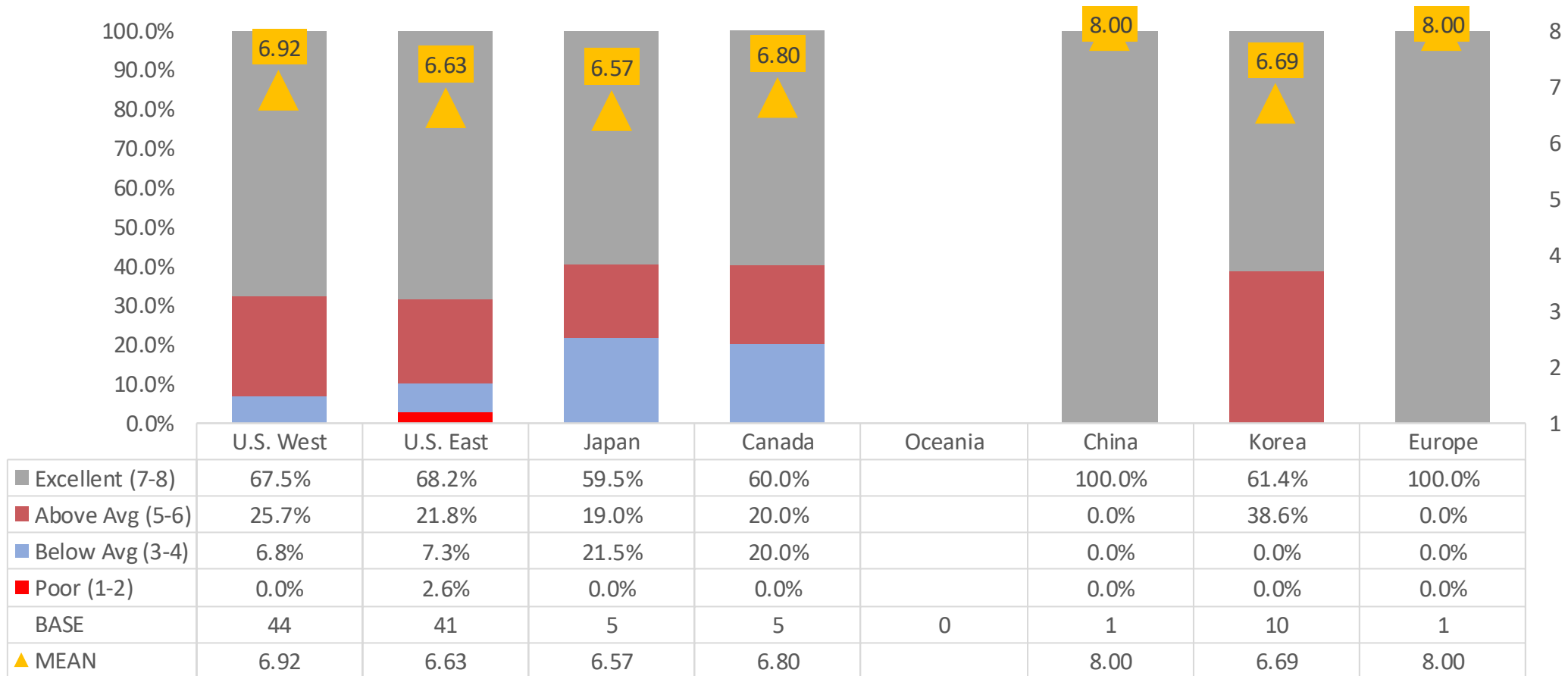
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



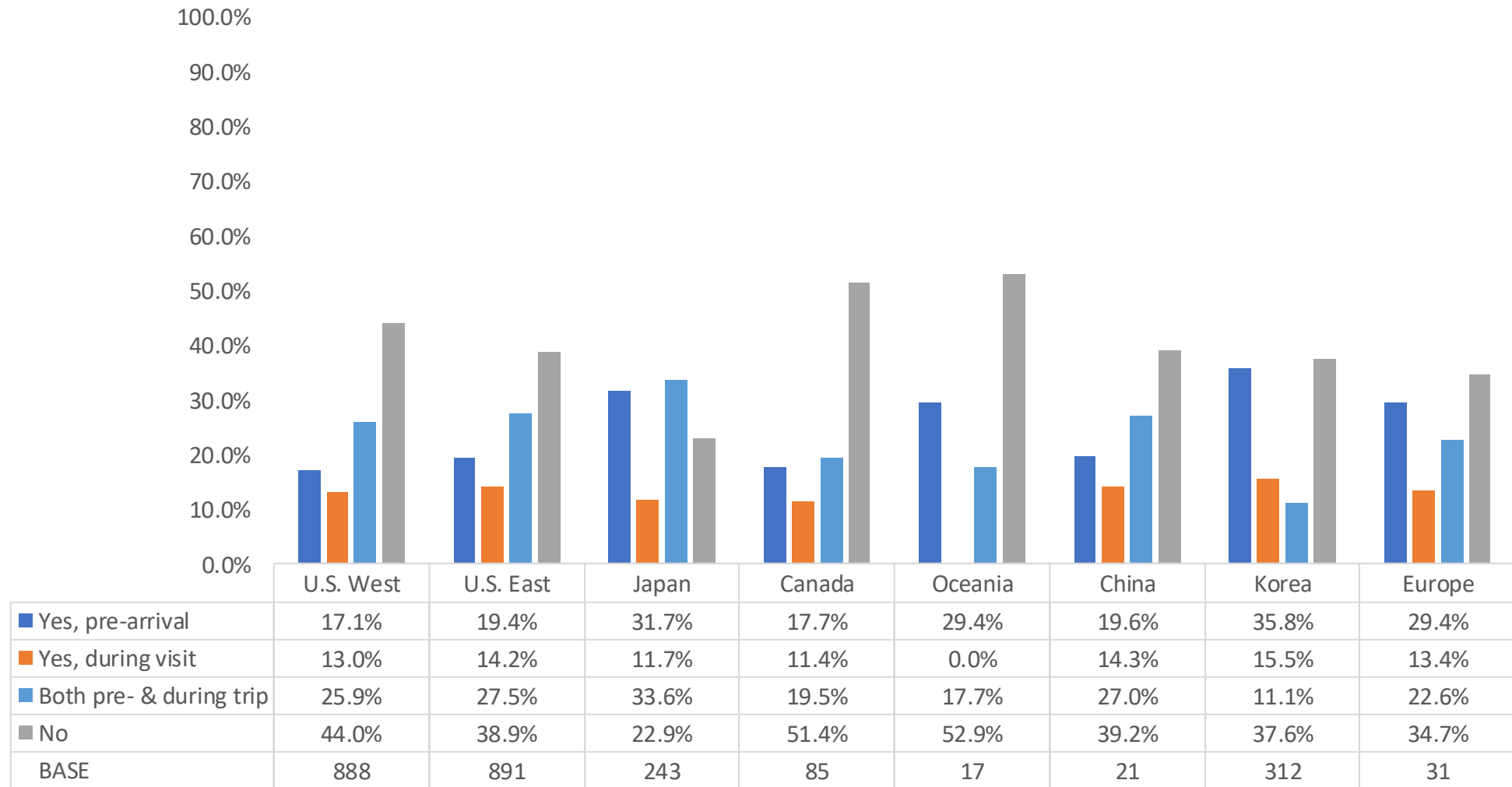
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

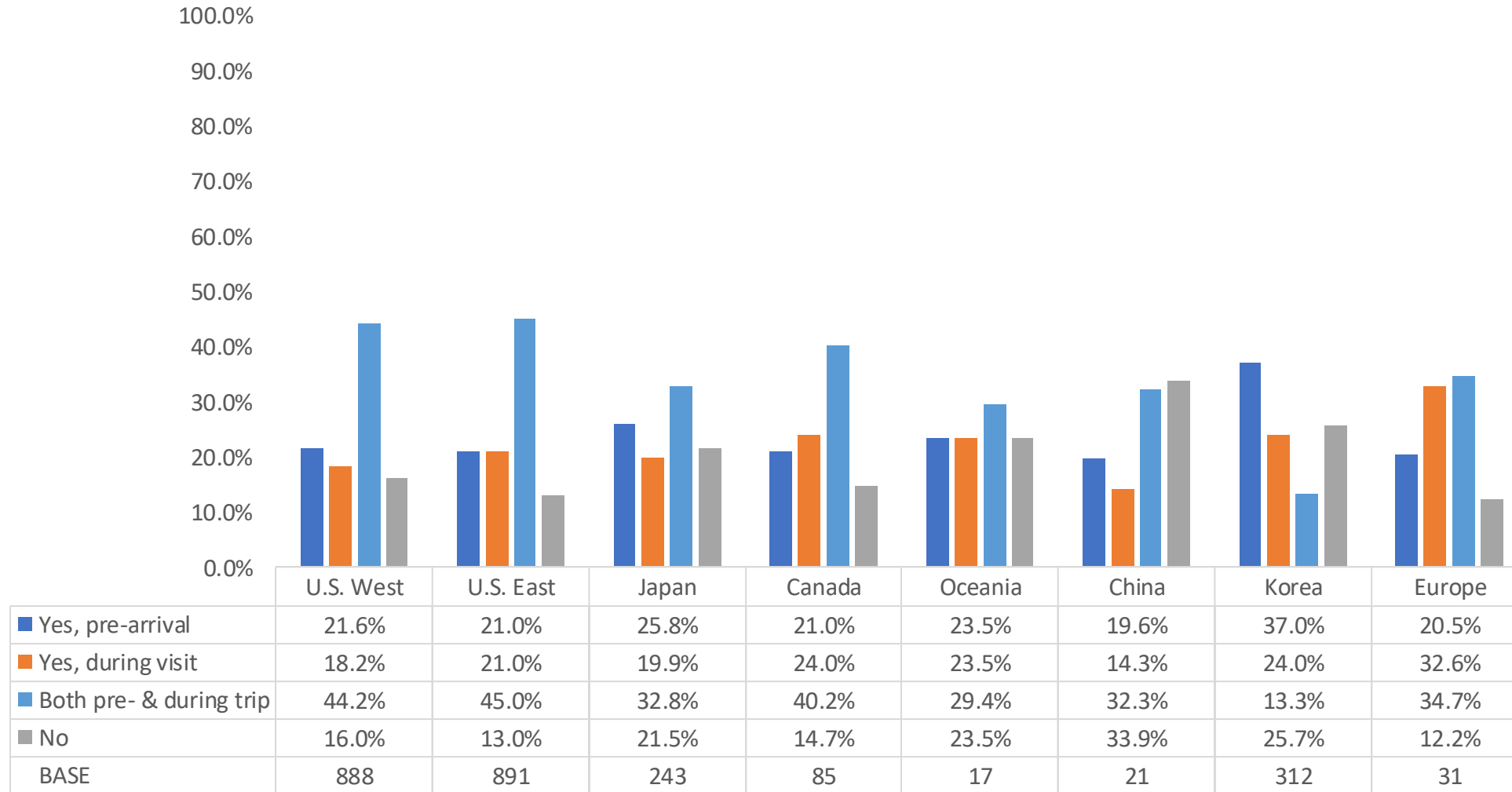


Section 4 – Messaging

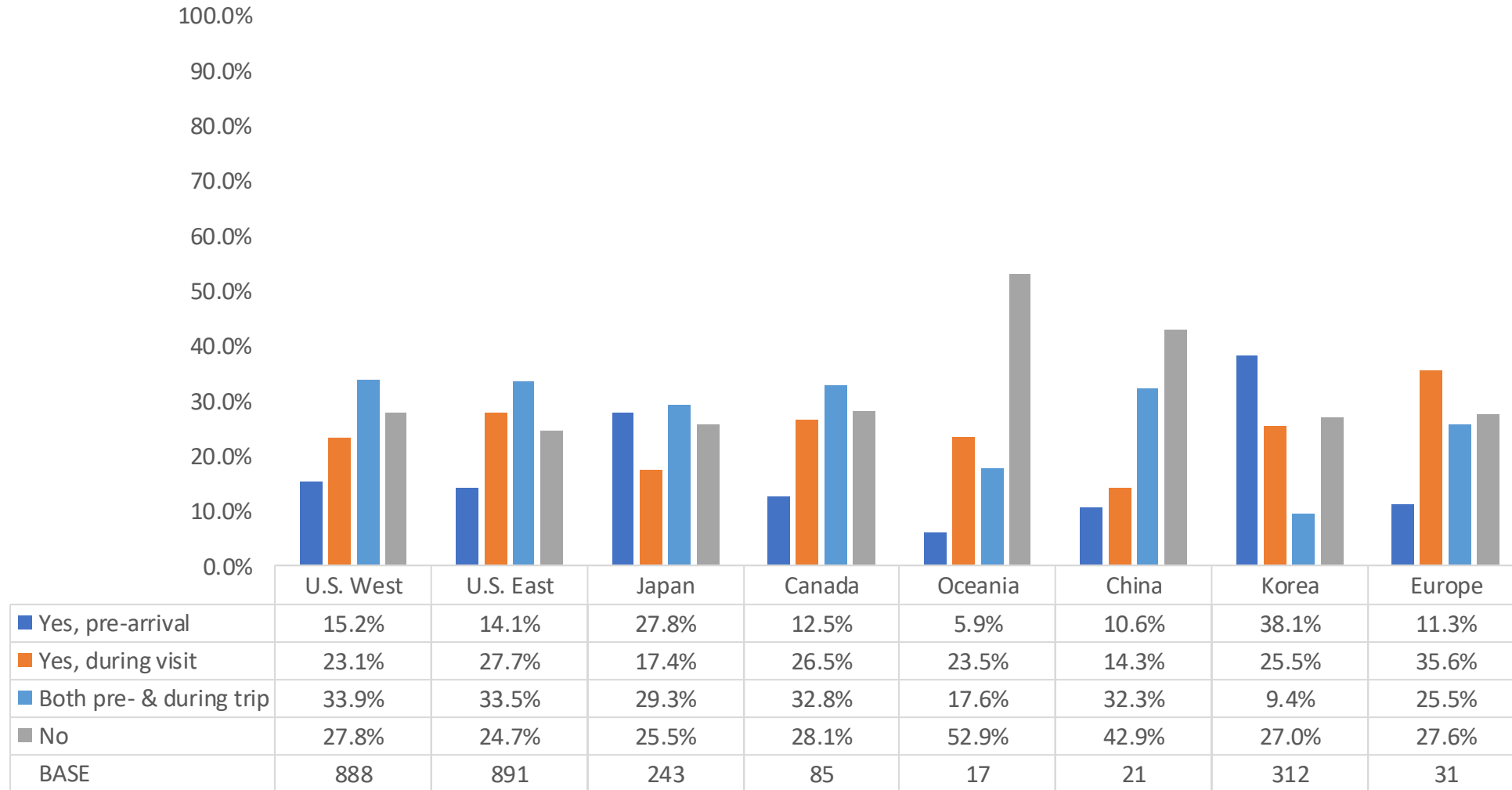
SAFE AND RESPONSIBLE TRAVEL



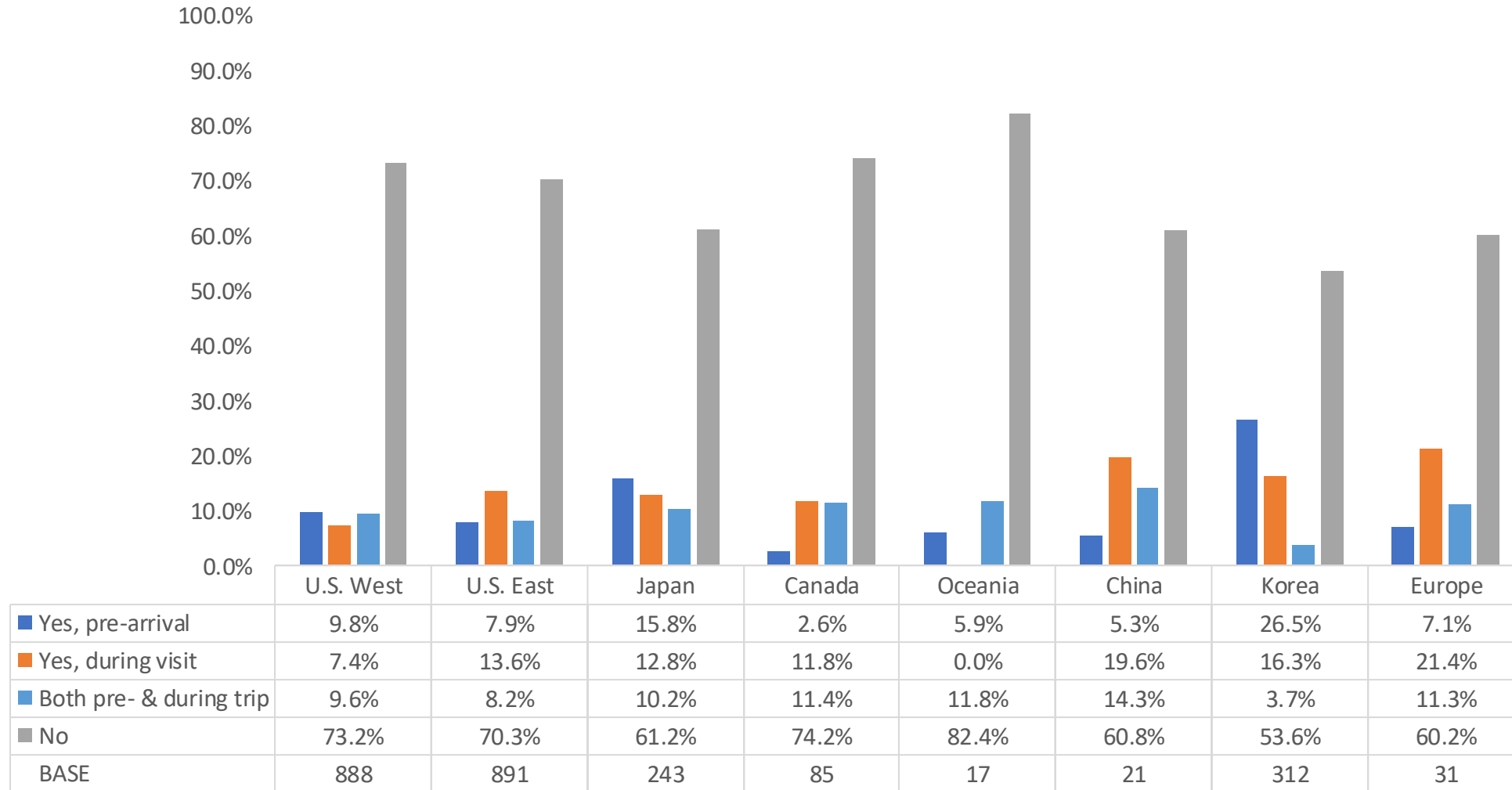
CARING FOR AND RESPECTING HAWAI‘I’S CULTURE, PEOPLE AND ENVIRONMENT



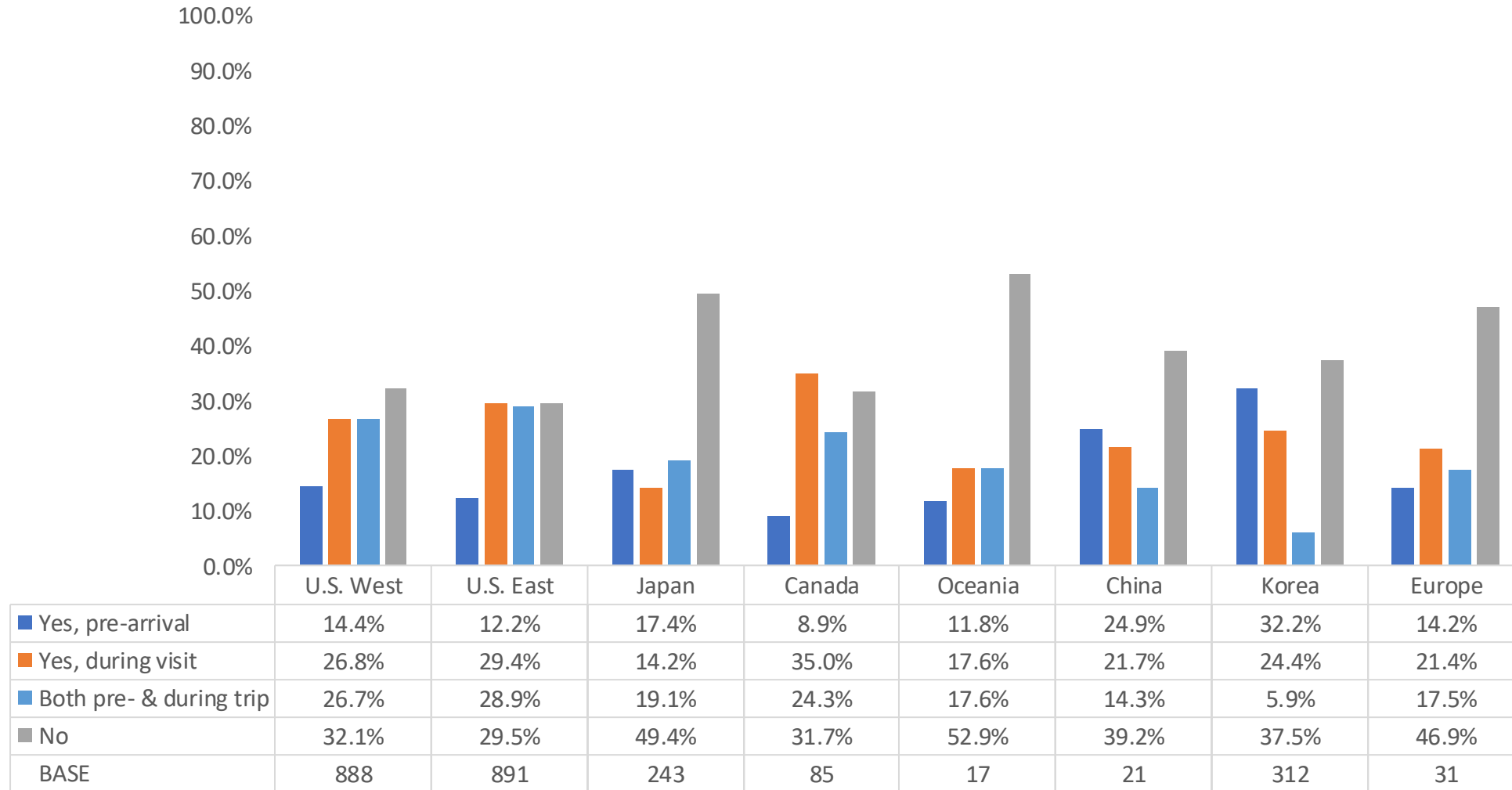
OCEAN AND HIKING SAFETY



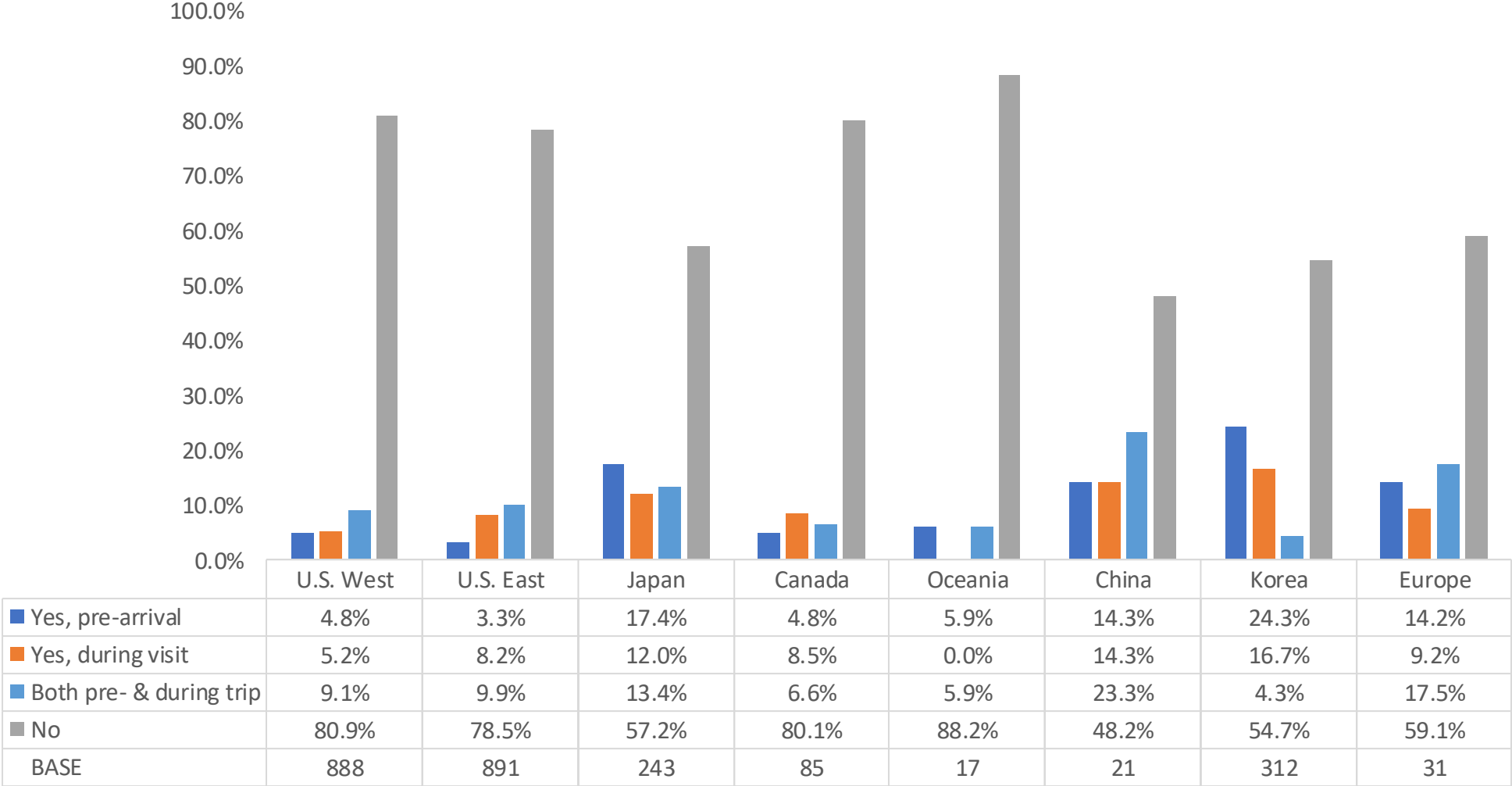
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL

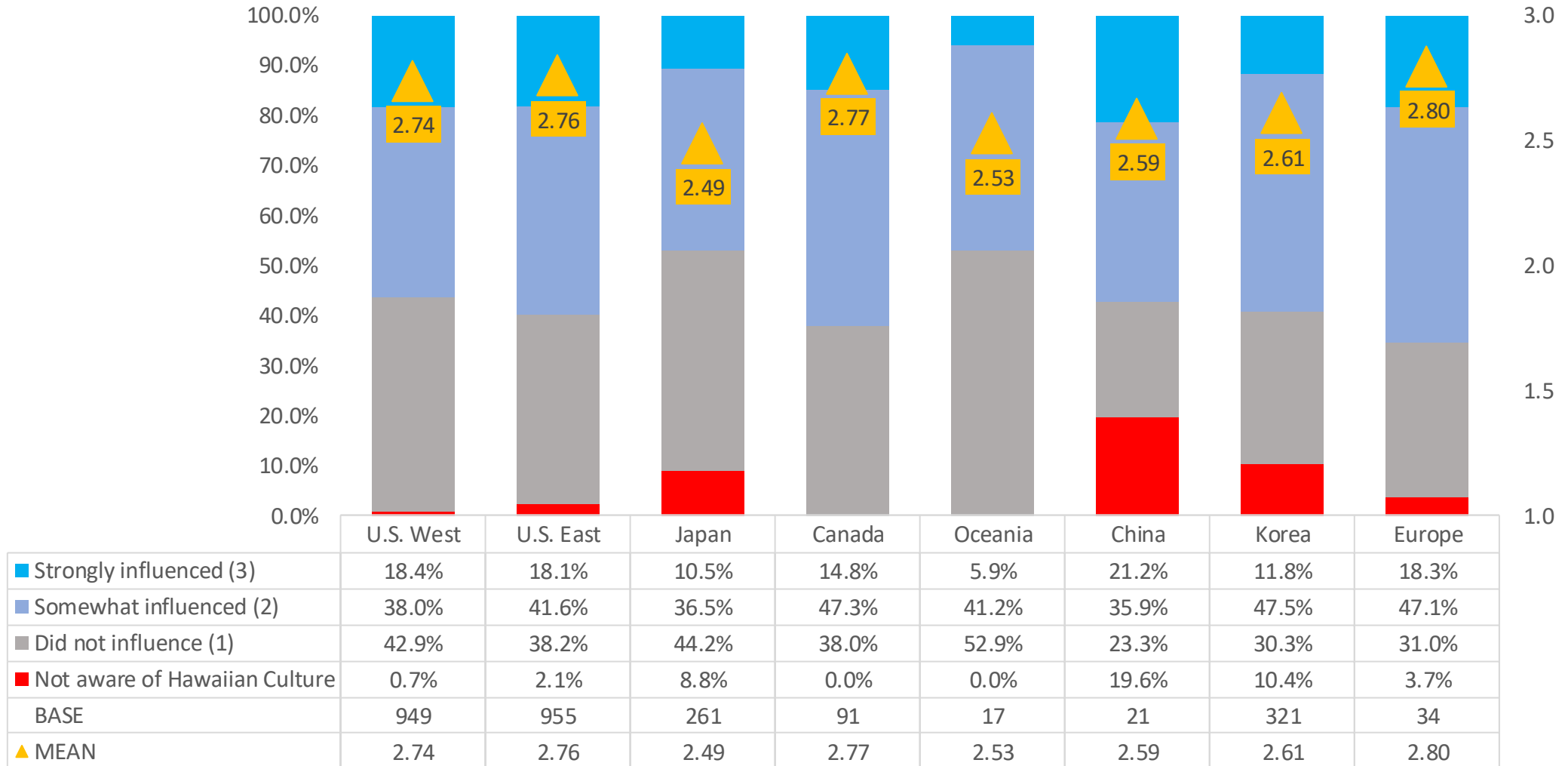


MĀLAMA HAWAI‘I



Section 5 – Hawaiian Culture

HAWAIIAN CULTURE IMPACT ON TRIP PLANNING



Section 6 – Destination Drivers

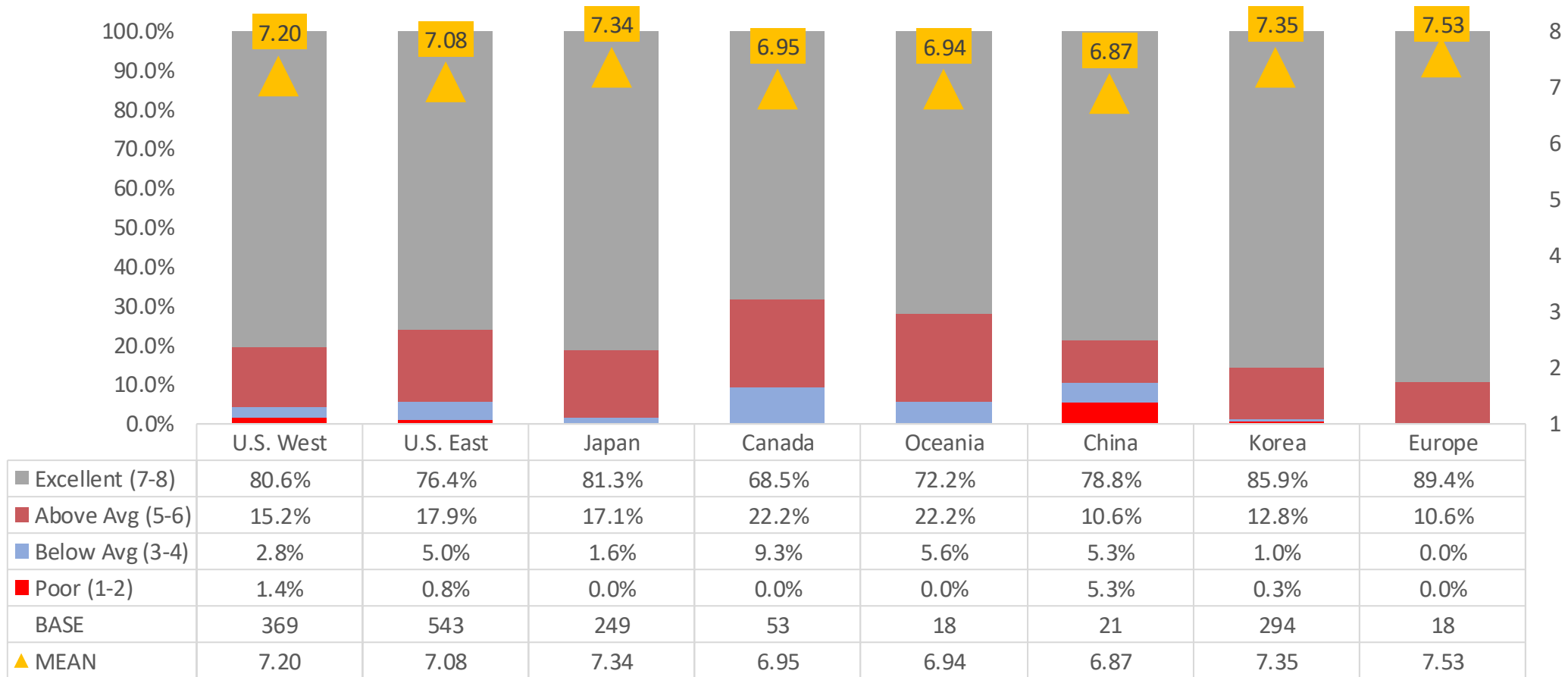
DESTINATION DRIVERS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Personal connection, repeat visitor	16.8%	13.2%	9.0%	14.3%	5.9%	1.9%	0.0%	3.6%
Personal preference, love Hawaii	15.2%	10.9%	15.5%	9.6%	17.6%	3.1%	5.3%	16.1%
Weather, climate	14.0%	11.7%	7.4%	10.2%	0.0%	14.1%	5.3%	1.8%
Time with family and friends, influence of family/ friends	12.2%	13.4%	5.6%	9.6%	17.6%	3.4%	3.7%	14.3%
Natural beauty and scenery	10.3%	10.9%	5.0%	14.8%	5.9%	17.3%	18.0%	6.2%
First-time visitor, wanted to experience HI	6.9%	13.7%	5.0%	4.8%	11.8%	4.2%	10.6%	4.4%
Special event or occasion, incl honeymoon	6.9%	6.3%	2.7%	2.4%	5.9%	3.5%	0.0%	3.6%
Other	2.8%	3.3%	30.3%	8.3%	0.0%	26.8%	41.2%	6.2%
Convenience, proximity, location	7.5%	2.5%	2.3%	8.2%	23.5%	1.8%	3.7%	4.4%
Vacation, leisure	5.7%	5.0%	3.7%	6.1%	5.9%	9.7%	5.3%	3.6%
Unique experiences/ attractions	5.1%	6.7%	0.8%	2.4%	0.0%	2.5%	5.3%	3.6%

Section 7 – O‘ahu

SATISFACTION - O'AHU

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



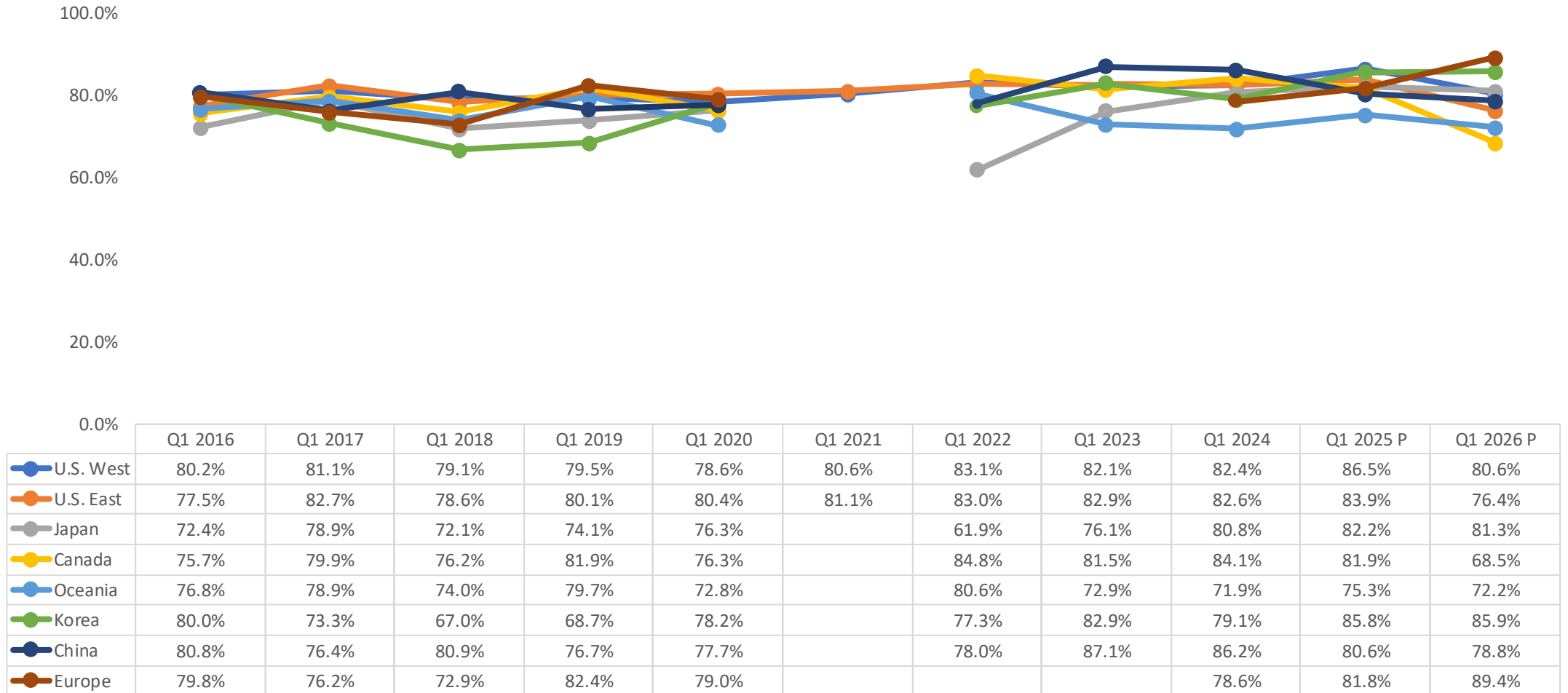
SATISFACTION - O'AHU

- **Islands visited:** Visitors from **U.S. West** and **U.S. East** whose trip was limited to staying just on O'ahu gave higher mean satisfaction scores compared to those whose visited multiple islands.
- **Education: Canadian** visitors without a college degree were more satisfied with their trip than college graduates from this visitor market.
- **Age:** Senior (65+) travelers from **U.S. West** were the least satisfied with their stay compared to younger travelers.
- **Gender:** Female visitors from **U.S. West** were more satisfied with their stay on O'ahu than male visitors.

SATISFACTION - O'AHU

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

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



P= Preliminary Data

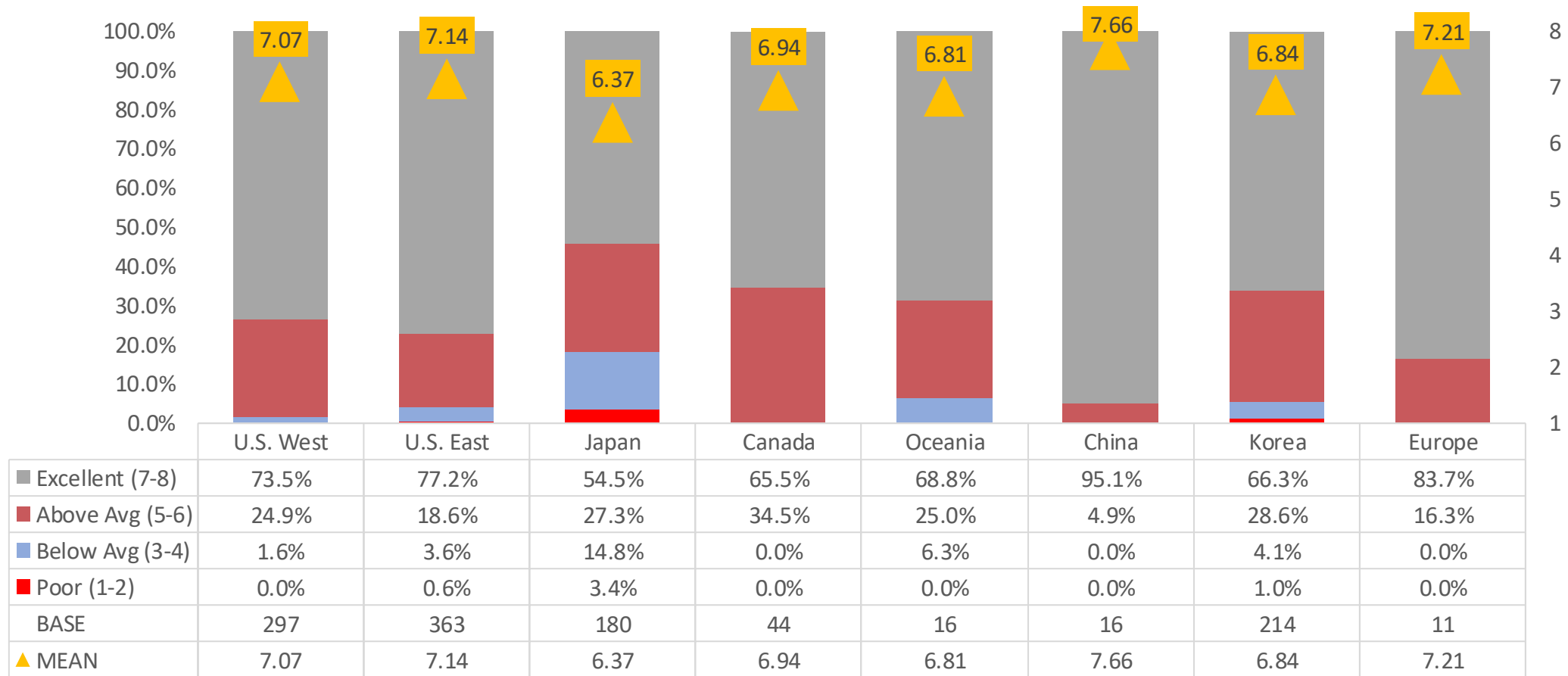
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



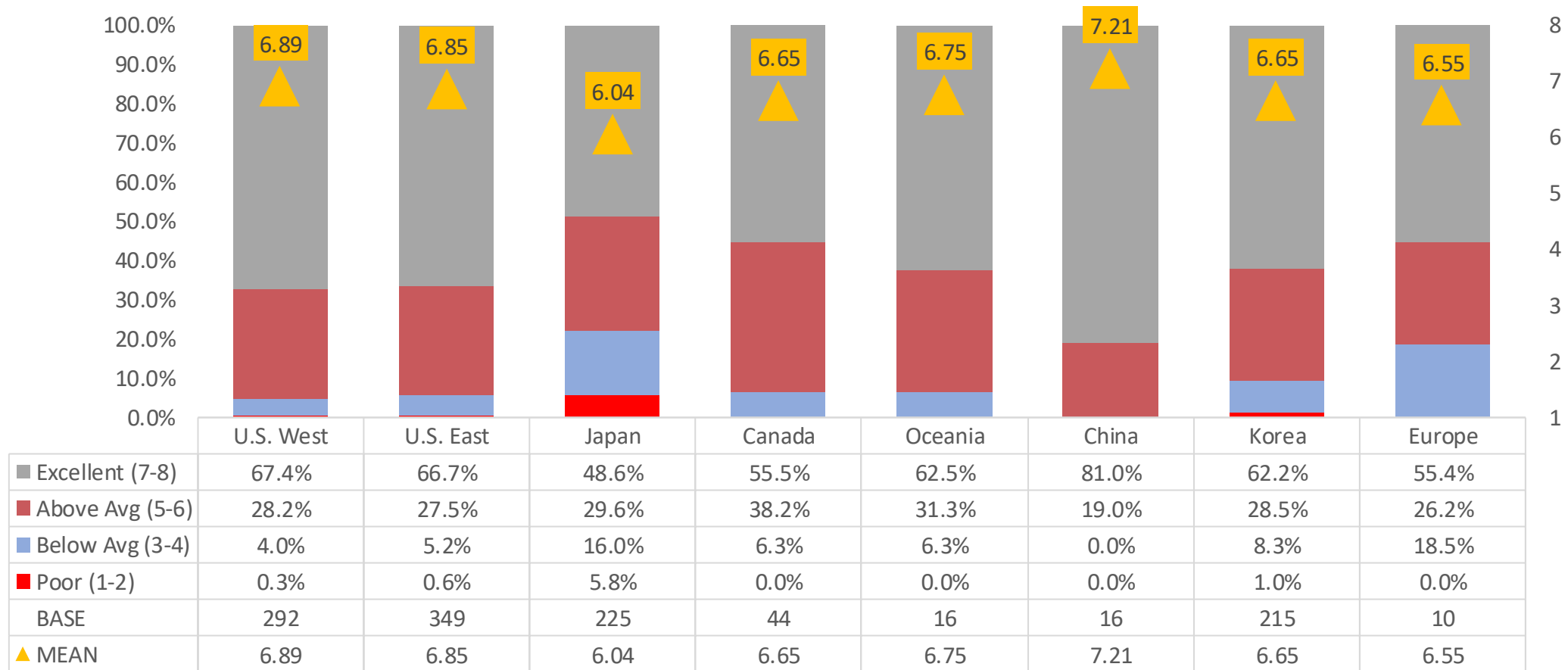
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



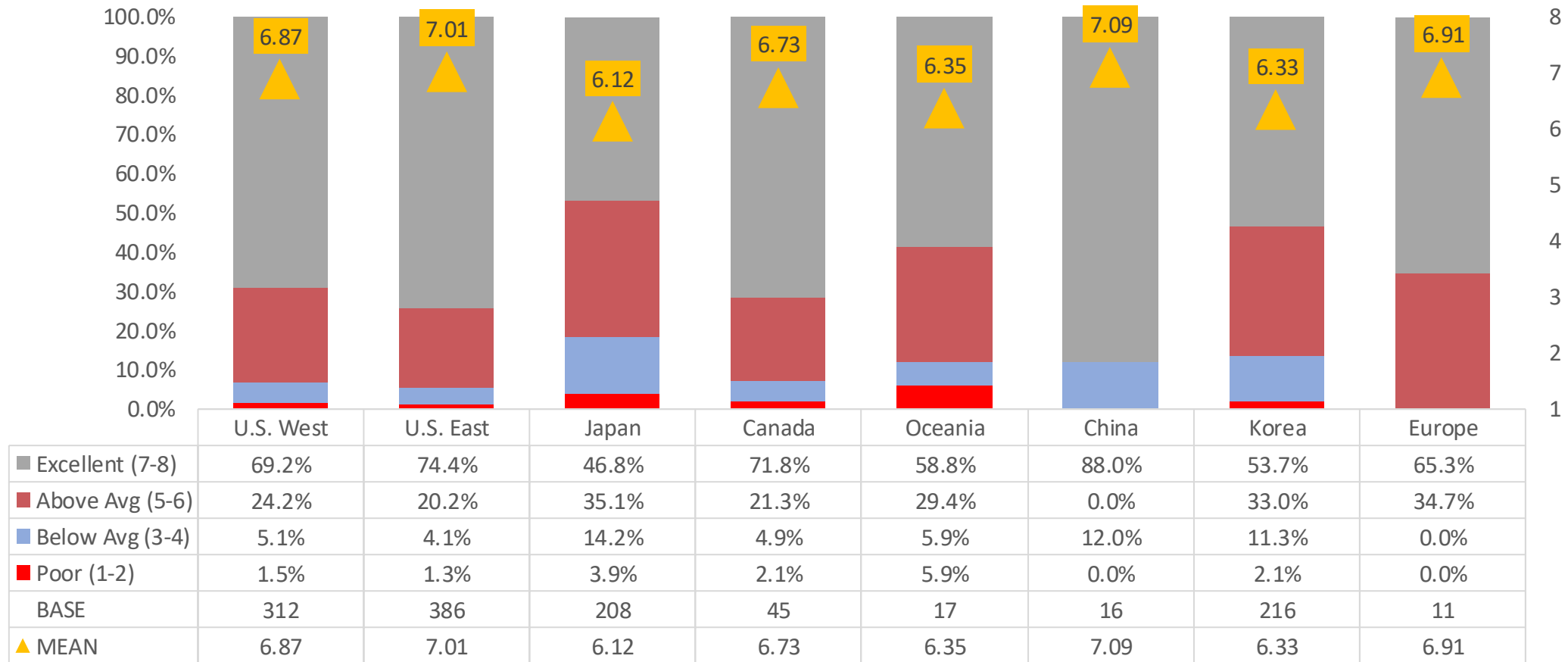
SHOPPING - O'AHU

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



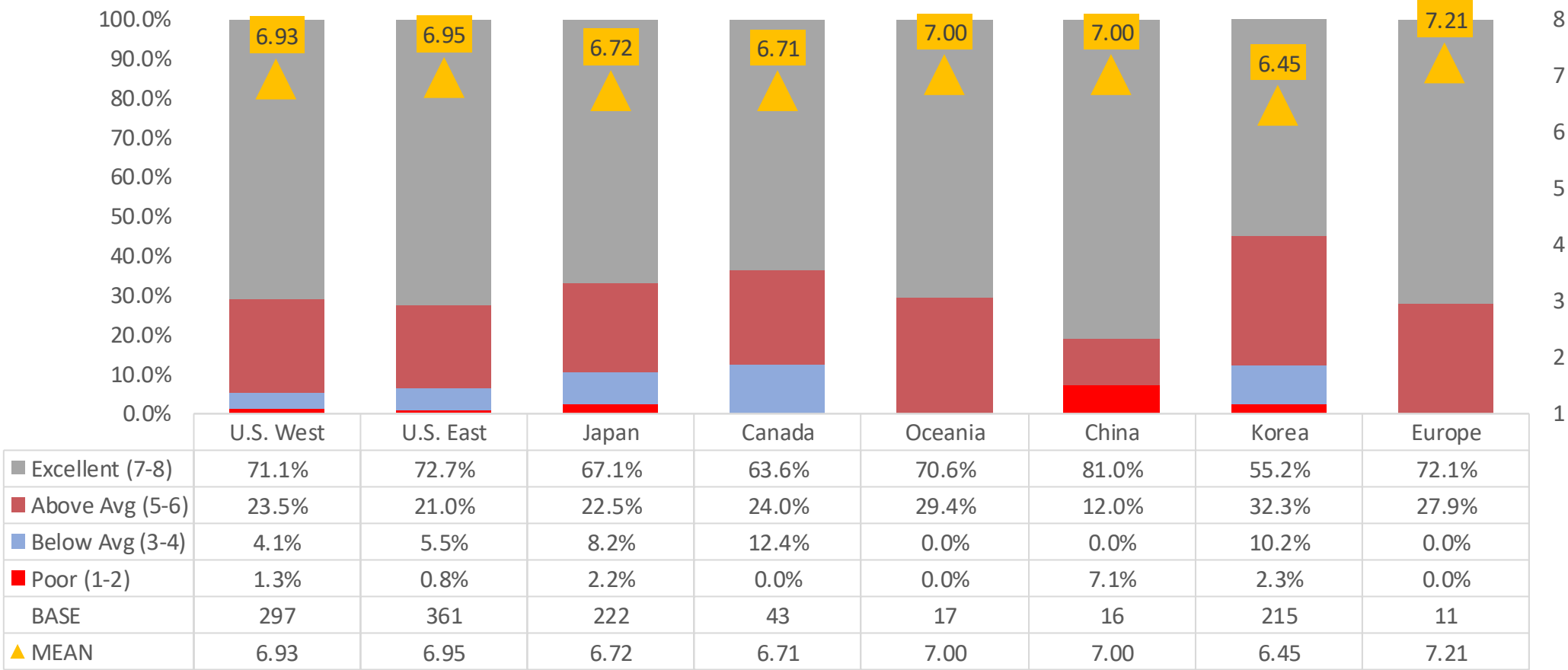
DINING/ FOOD & BEVERAGES - O'AHU

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



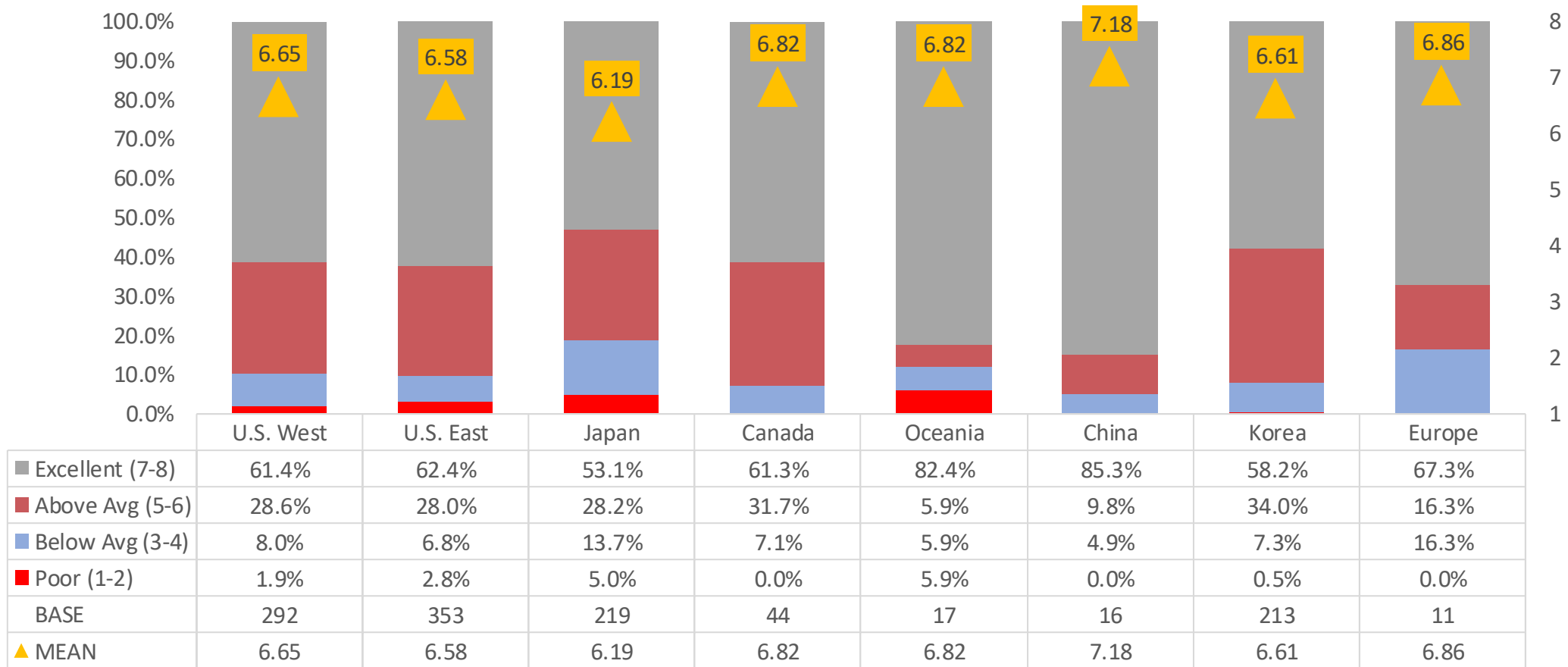
LODGING/ ACCOMMODATIONS - O‘AHU

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



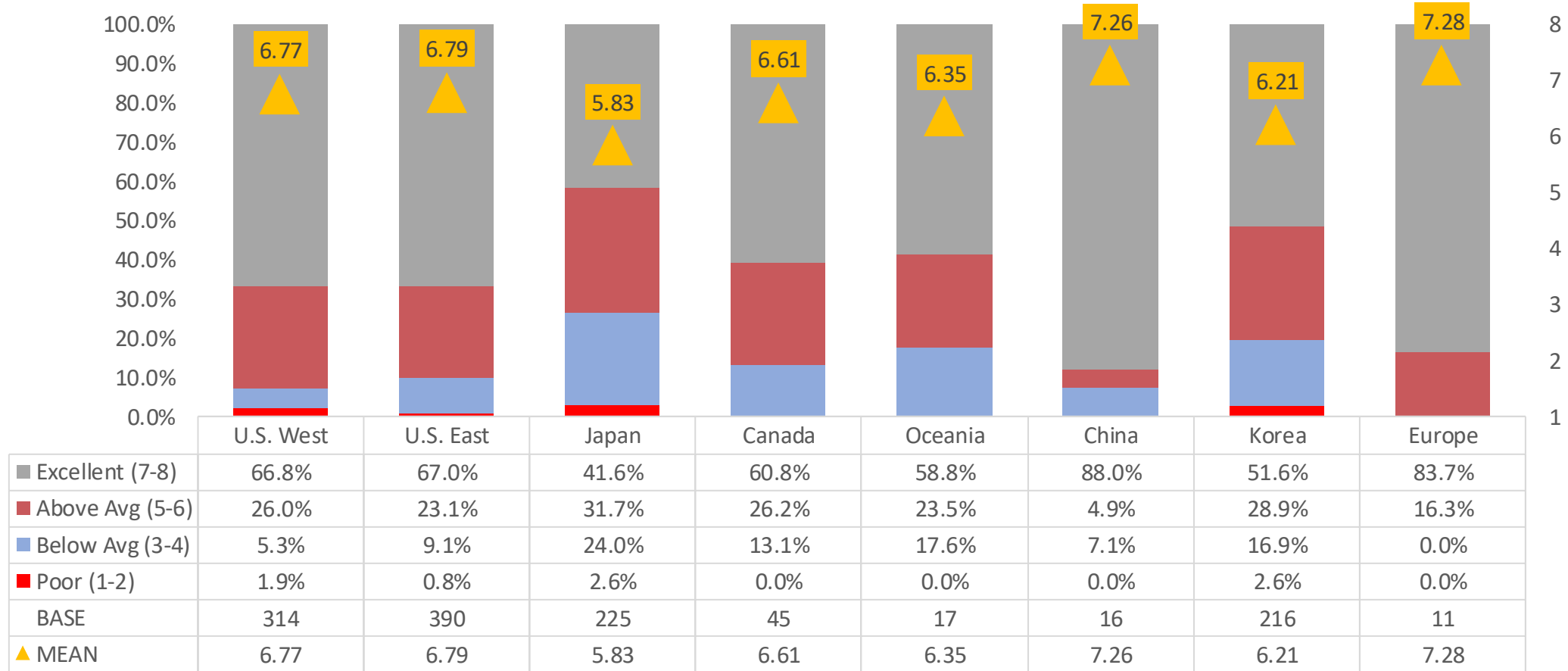
TRANSPORTATION ON ISLAND - O‘AHU

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



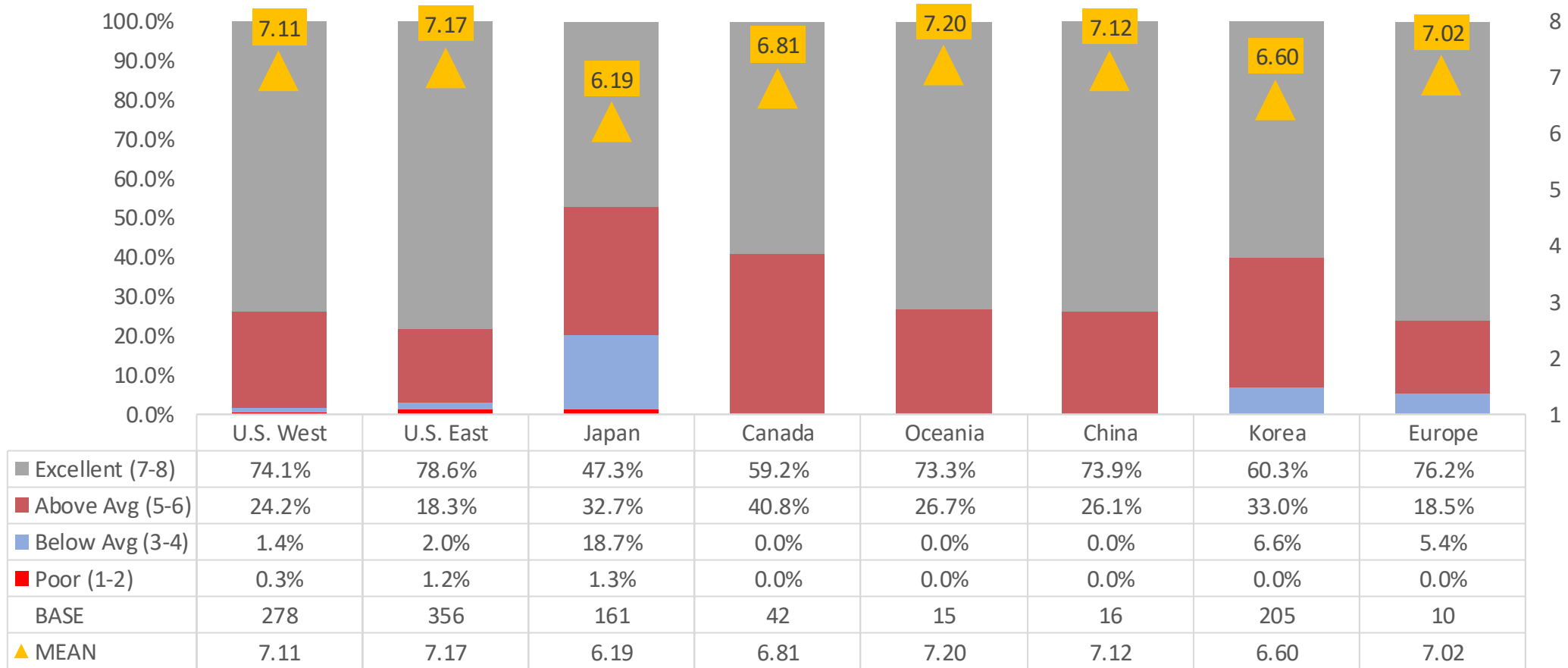
AIRPORT - O'AHU

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



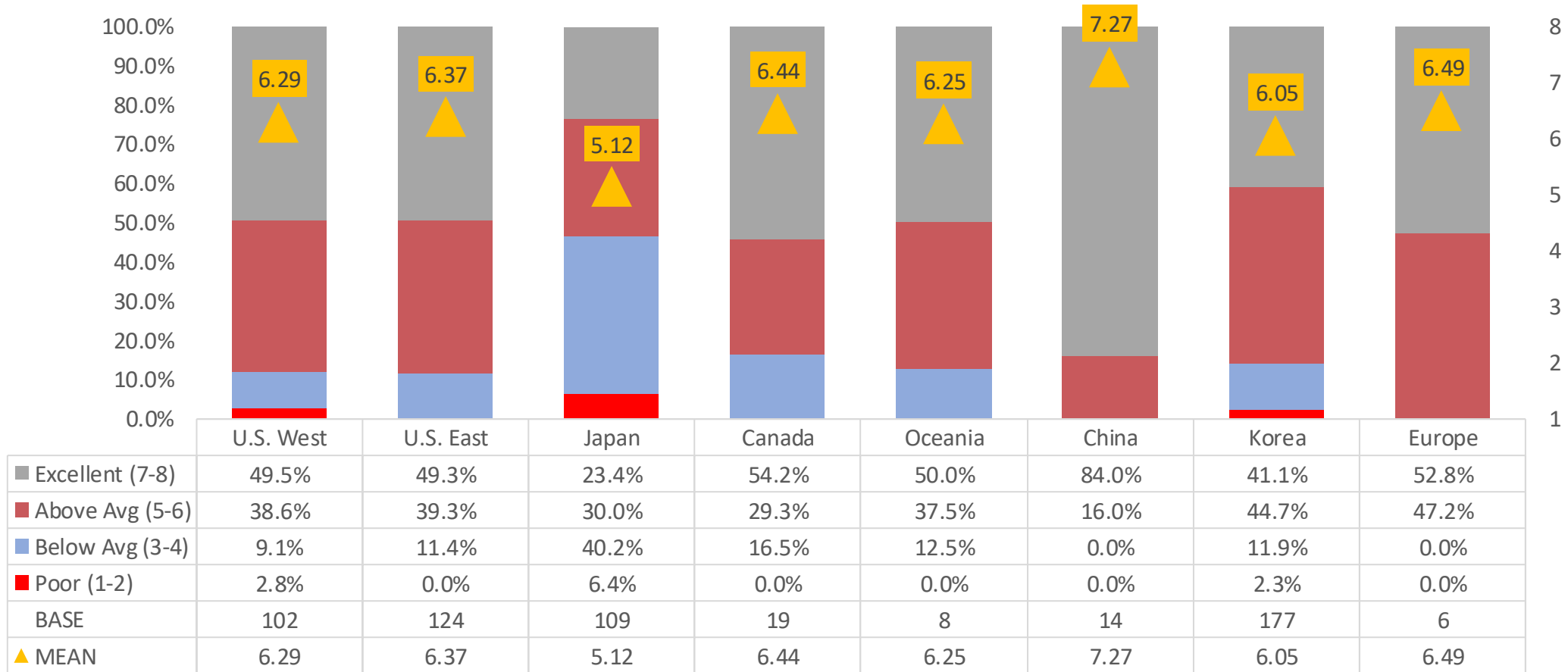
CULTURAL EXPERIENCES - O'AHU

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



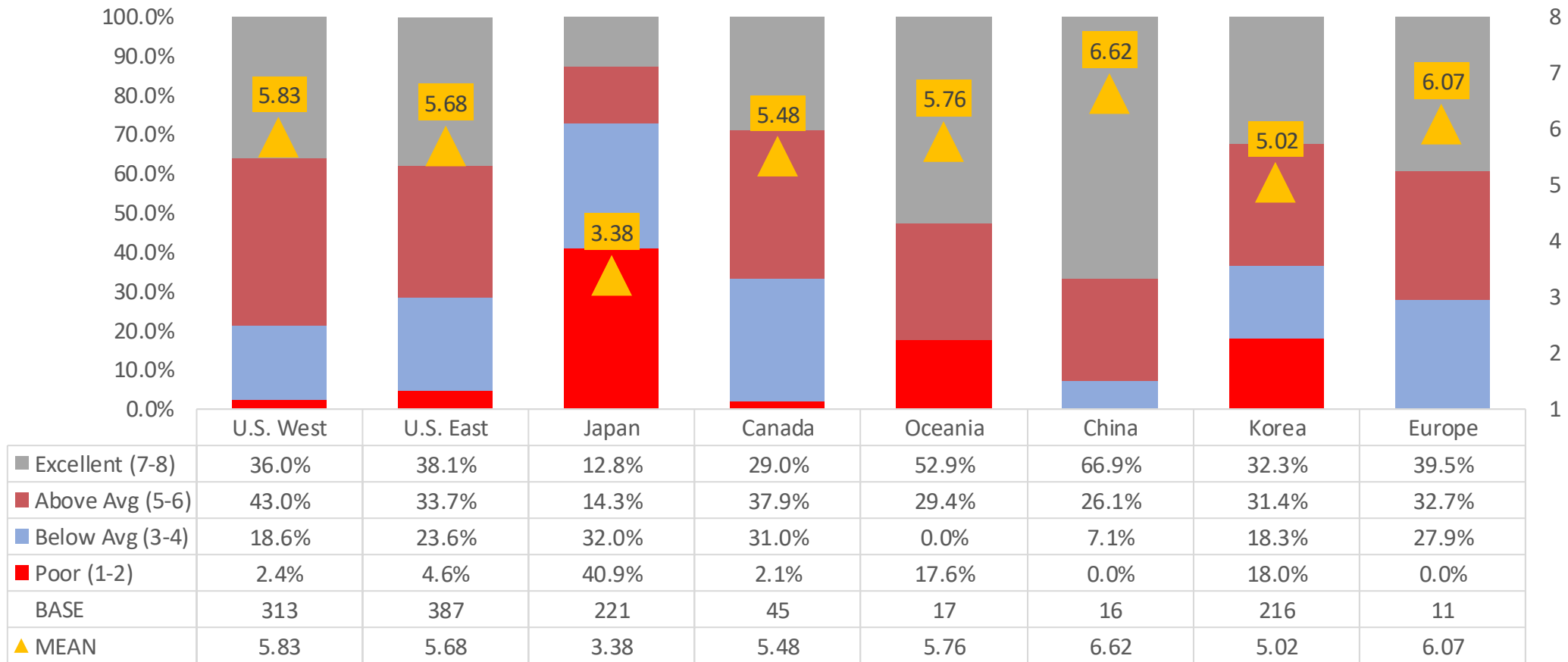
VOLUNTEER EXPERIENCES - O'AHU

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



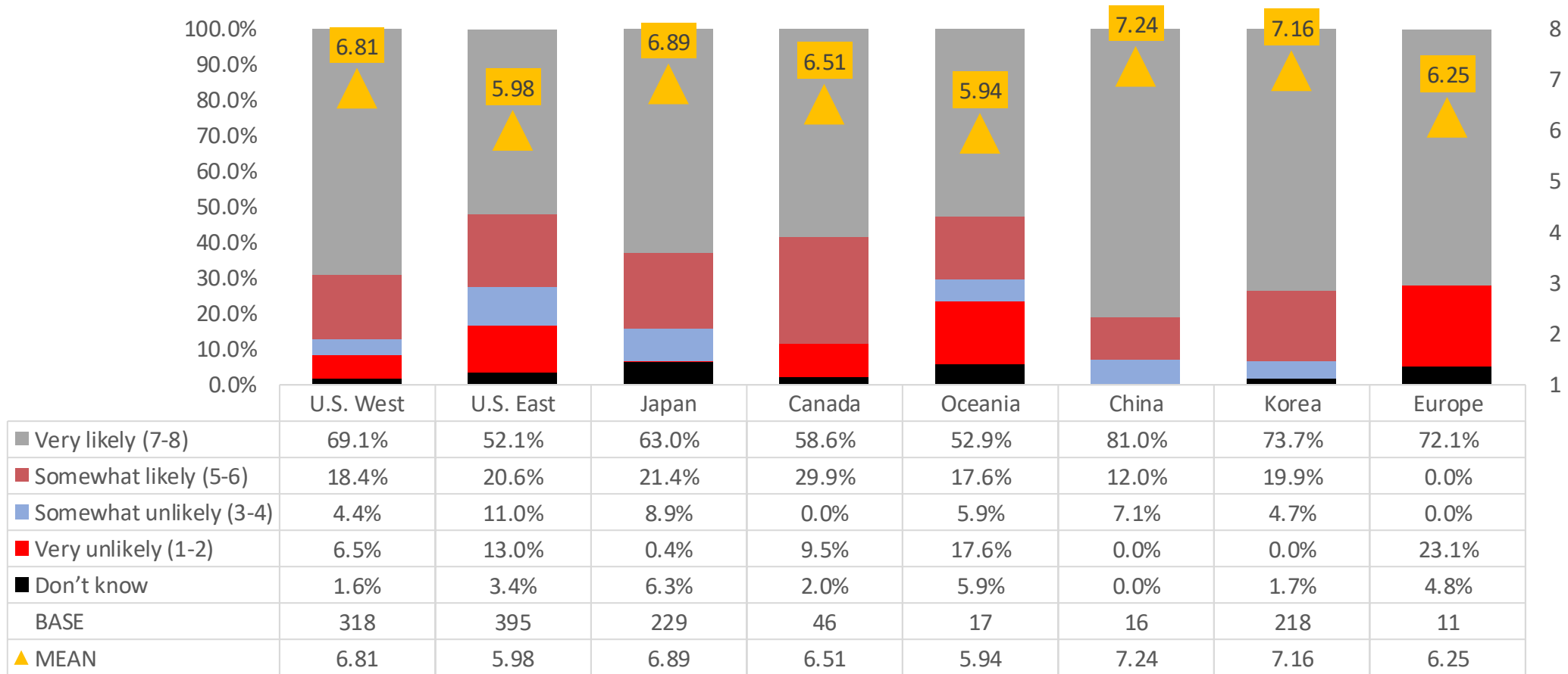
OVERALL VALUE FOR THE MONEY - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

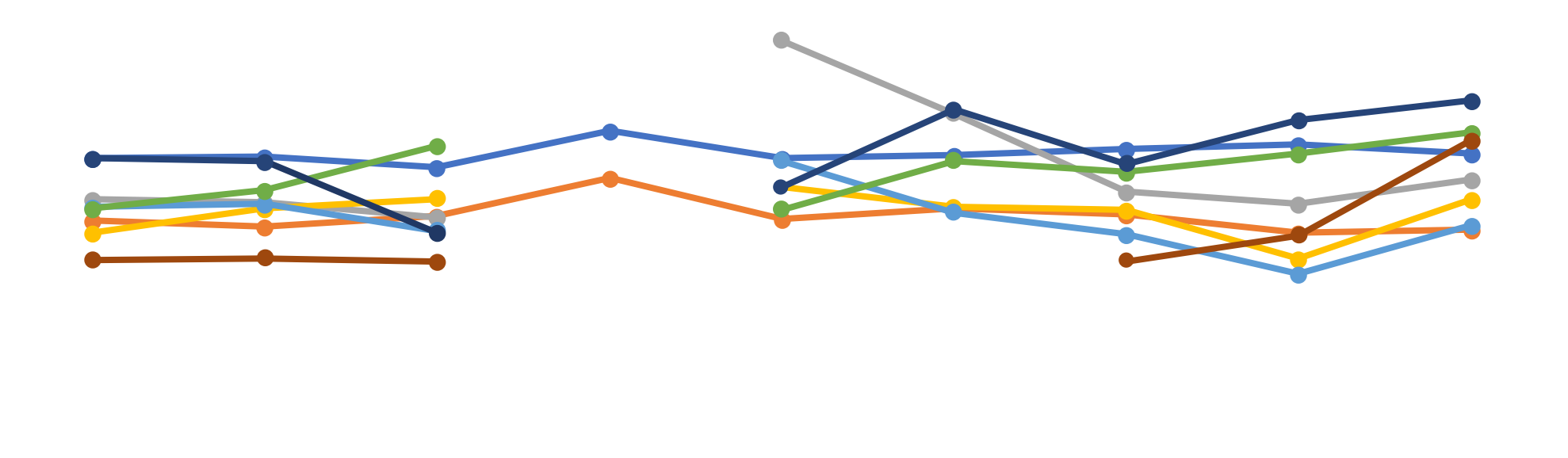
8-pt Rating Scale
8 = Excellent / 1 = Poor



LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)

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



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	67.9%	68.2%	66.0%	74.0%	68.1%	68.6%	70.0%	71.0%	69.1%
U.S. East	54.1%	52.5%	55.1%	63.4%	54.2%	56.6%	55.2%	51.3%	52.1%
Japan	58.8%	58.0%	54.6%		94.2%	77.9%	60.3%	57.7%	63.0%
Canada	51.2%	56.6%	58.8%		61.5%	56.9%	56.5%	45.3%	58.6%
Oceania	56.9%	57.6%	51.6%		67.4%	55.7%	50.8%	42.0%	52.9%
Korea	56.7%	60.8%	70.5%		56.5%	67.3%	65.0%	68.9%	73.7%
China	68.1%	67.2%	51.1%		61.4%	78.7%	66.7%	76.4%	81.0%
Europe	45.5%	45.6%	44.7%				44.8%	50.7%	72.1%

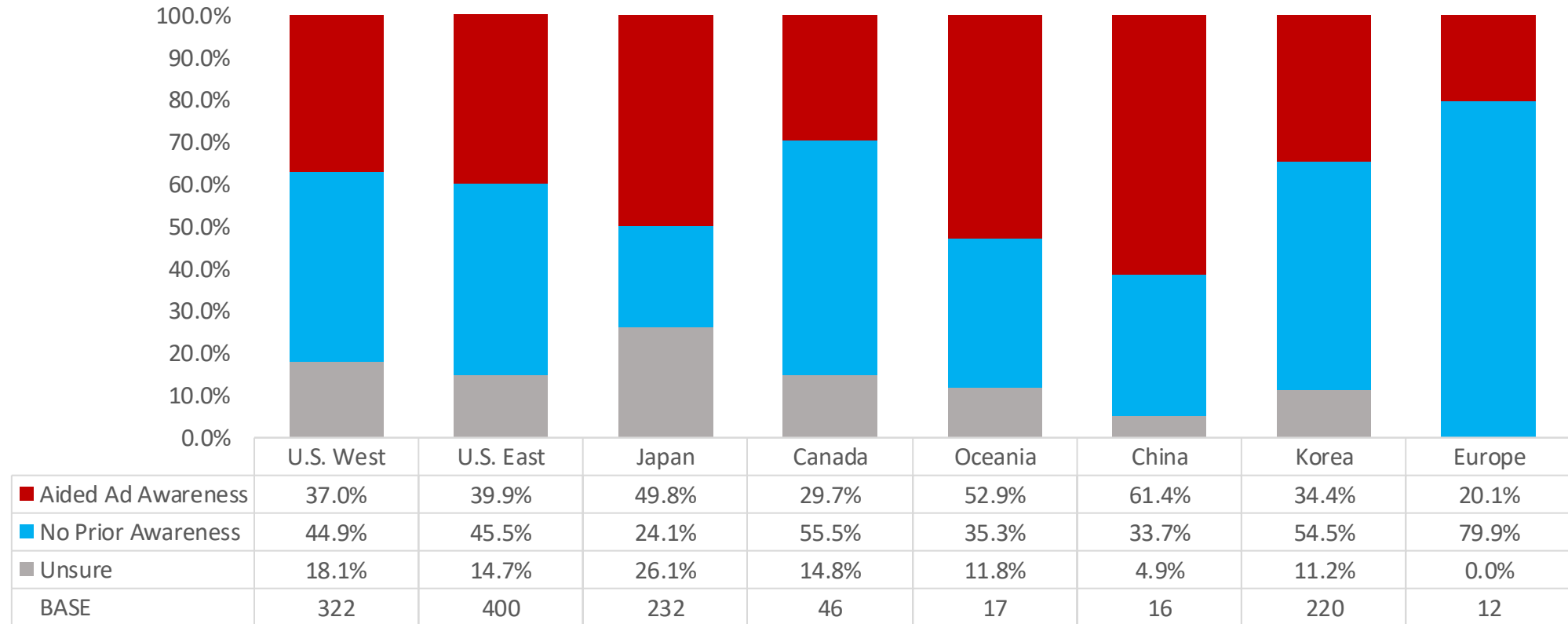
P= Preliminary Data

Q. How likely are you to visit O‘ahu again in the next five years?

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.



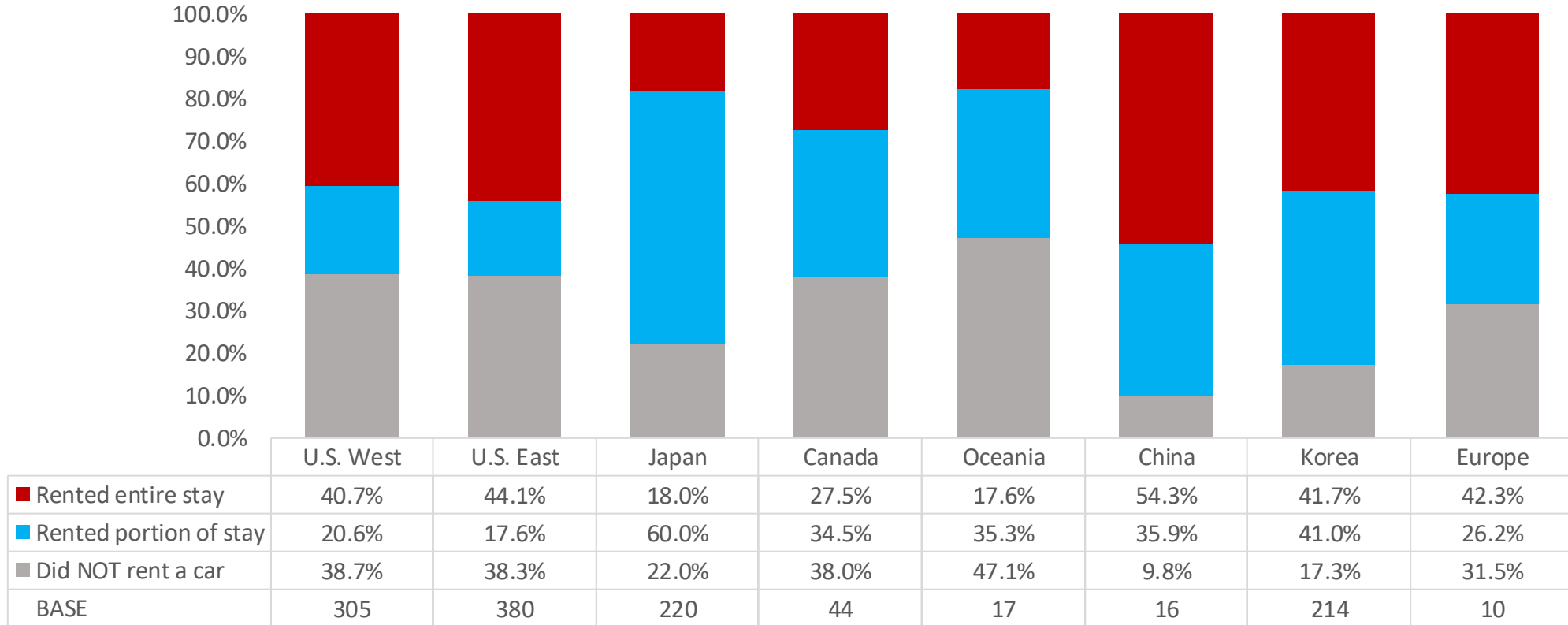
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai'i	13.8%	17.4%	40.5%	21.6%	23.5%	38.0%	15.6%	46.8%
Hawaiian music	12.4%	12.7%	17.4%	23.1%	11.8%	38.0%	5.8%	22.1%
Social media posts and videos	15.9%	20.2%	44.9%	18.3%	29.4%	26.1%	28.4%	33.1%
Outdoor or sporting activities and events	10.1%	10.3%	8.6%	15.6%	17.6%	19.0%	14.0%	0.0%
Hawaiian cultural experience and Hawaiian cultural events	20.7%	28.4%	12.9%	18.3%	17.6%	26.1%	9.0%	44.2%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	41.4%	52.6%	38.8%	52.8%	35.3%	62.0%	50.5%	64.3%
Attend a festival or other event	5.6%	5.3%	2.5%	2.0%	0.0%	7.1%	1.6%	0.0%
BASE	322	400	232	46	17	16	220	12

CAR RENTAL - O'AHU

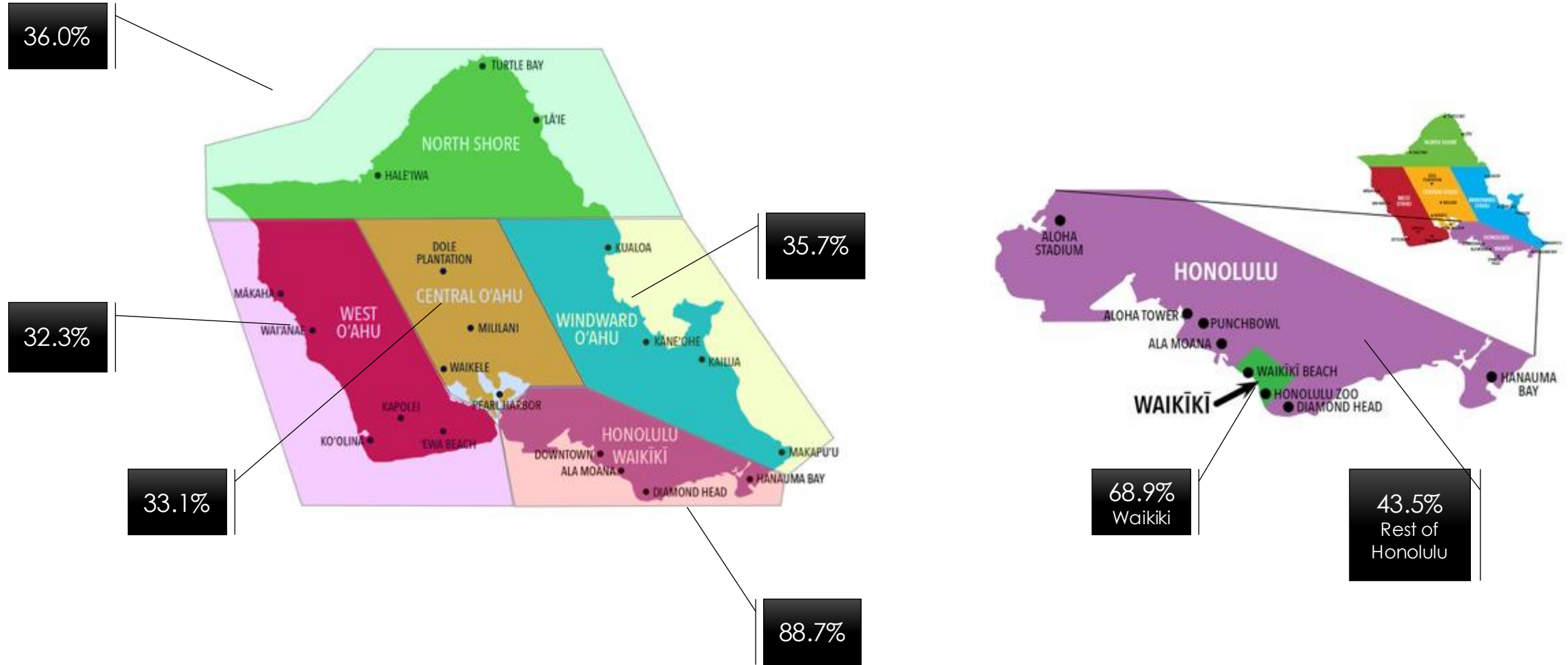


REASONS FOR PARTIAL RENTAL CAR - O'AHU

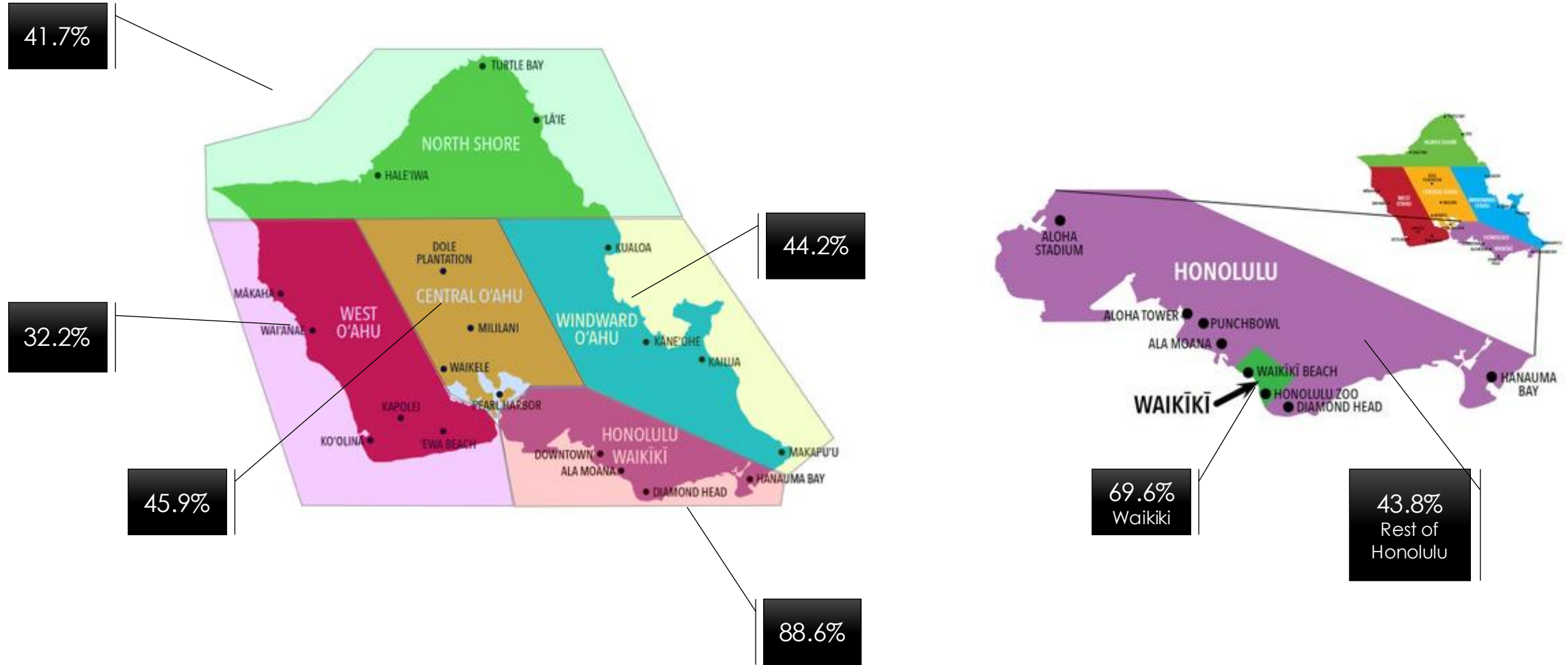
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	63.9%	69.8%	88.5%	73.5%	83.3%	47.0%	51.7%	50.0%
Parking was too expensive at my hotel/ lodging	43.6%	43.6%	3.7%	67.4%	16.7%	13.7%	33.8%	0.0%
Car rental rates were too expensive	27.0%	20.9%	9.3%	32.6%	0.0%	47.0%	44.5%	0.0%
Wanted to reduce my carbon footprint	17.9%	7.3%	2.2%	18.2%	16.7%	33.3%	3.8%	50.0%
BASE	64	67	132	15	6	6	86	2



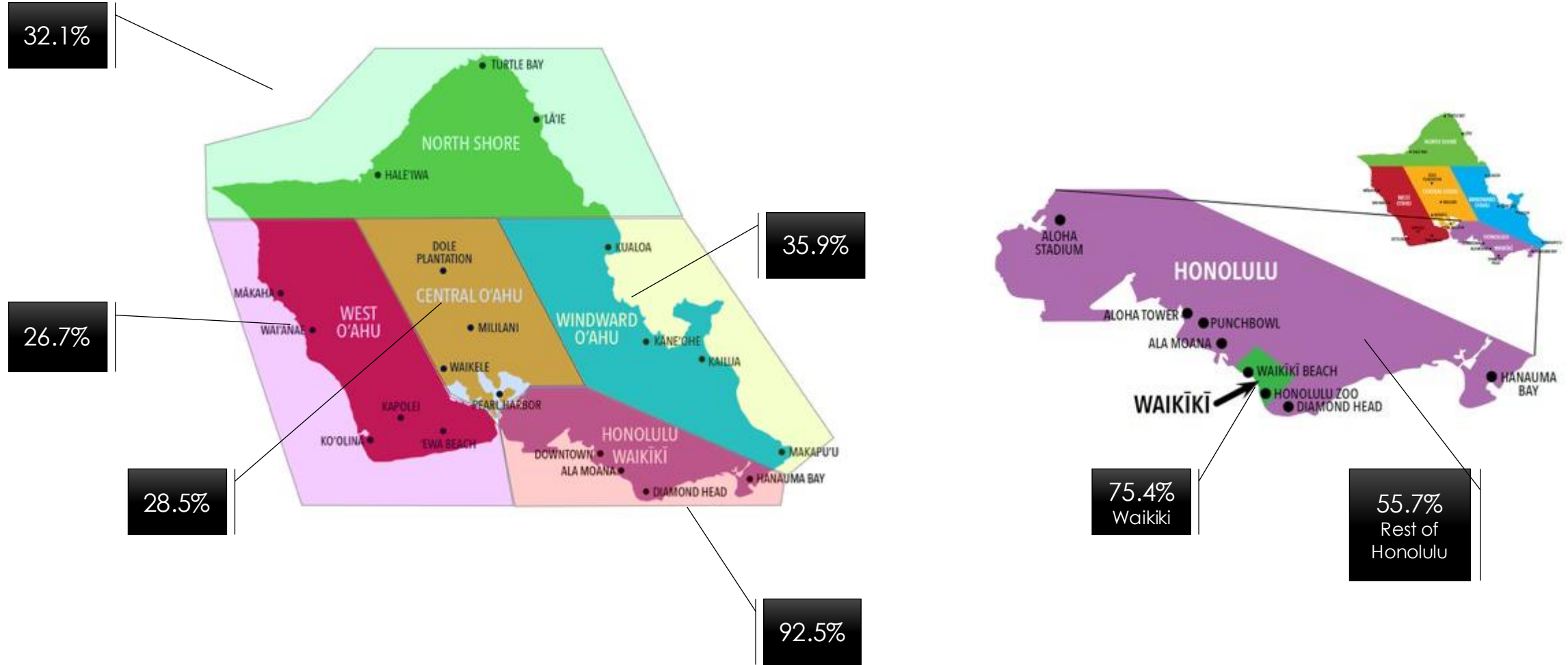
AREAS VISITED - O'AHU U.S. WEST



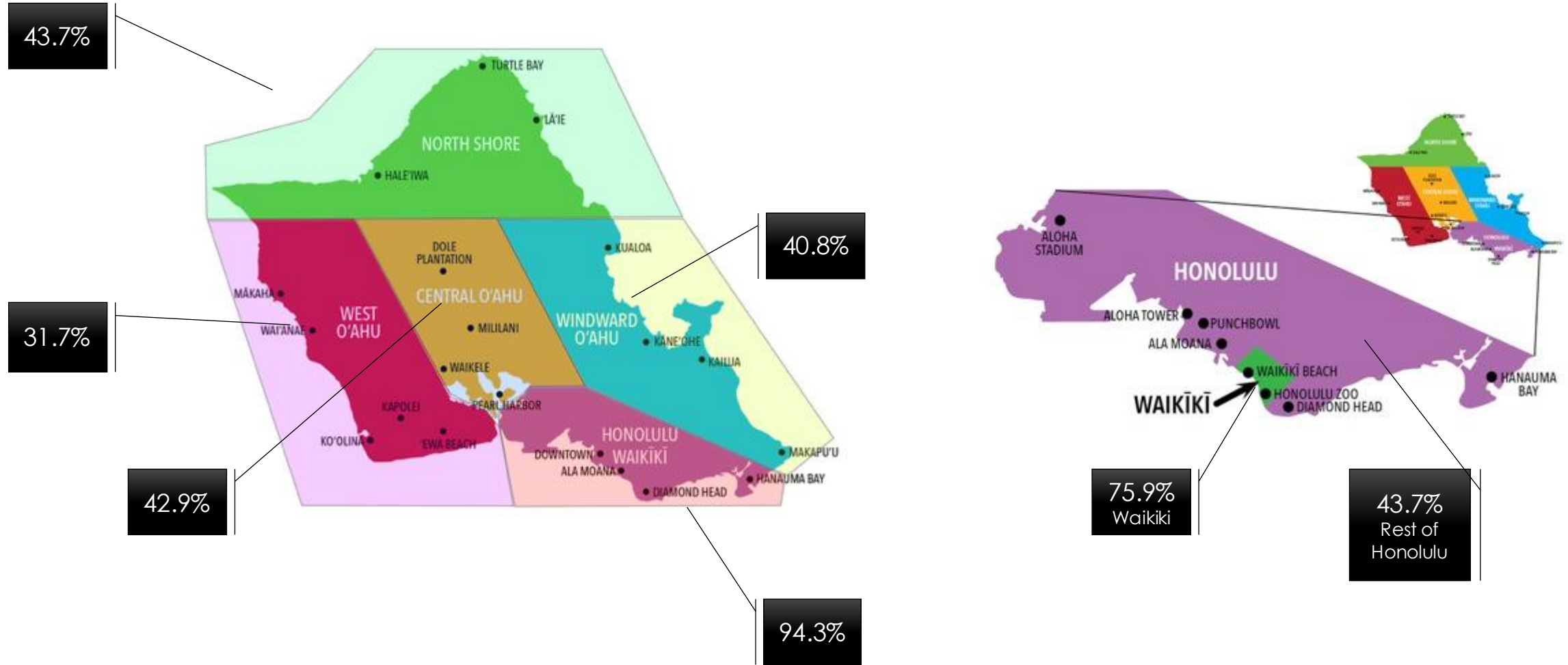
AREAS VISITED - O'AHU U.S. EAST



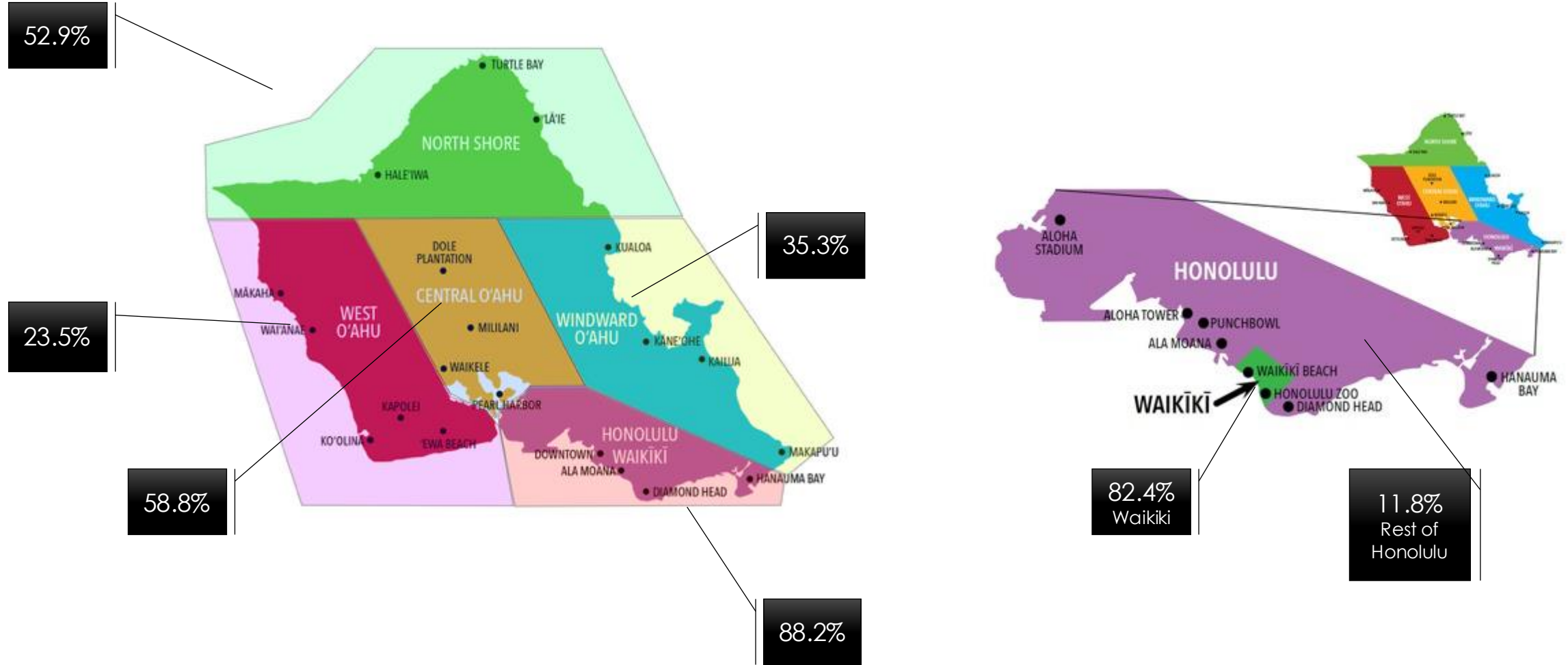
AREAS VISITED - O'AHU JAPAN



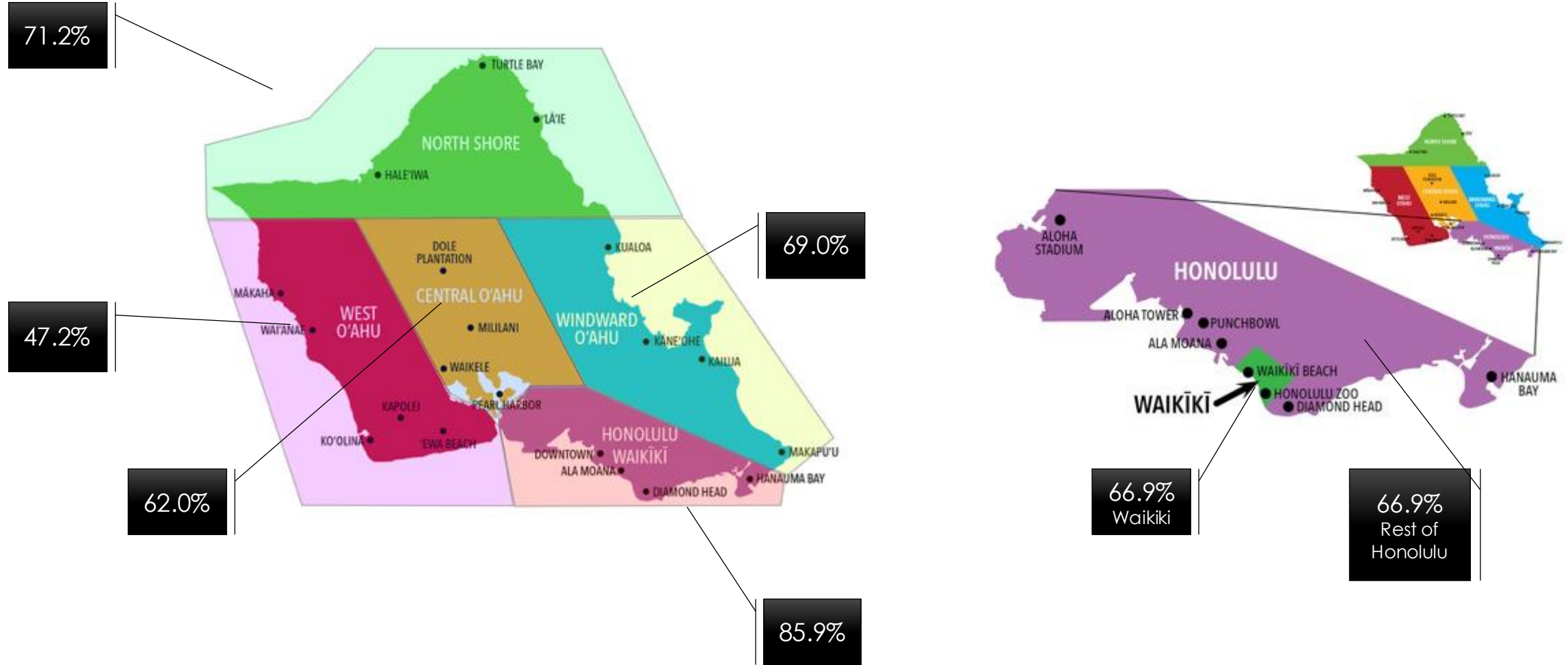
AREAS VISITED - O'AHU CANADA



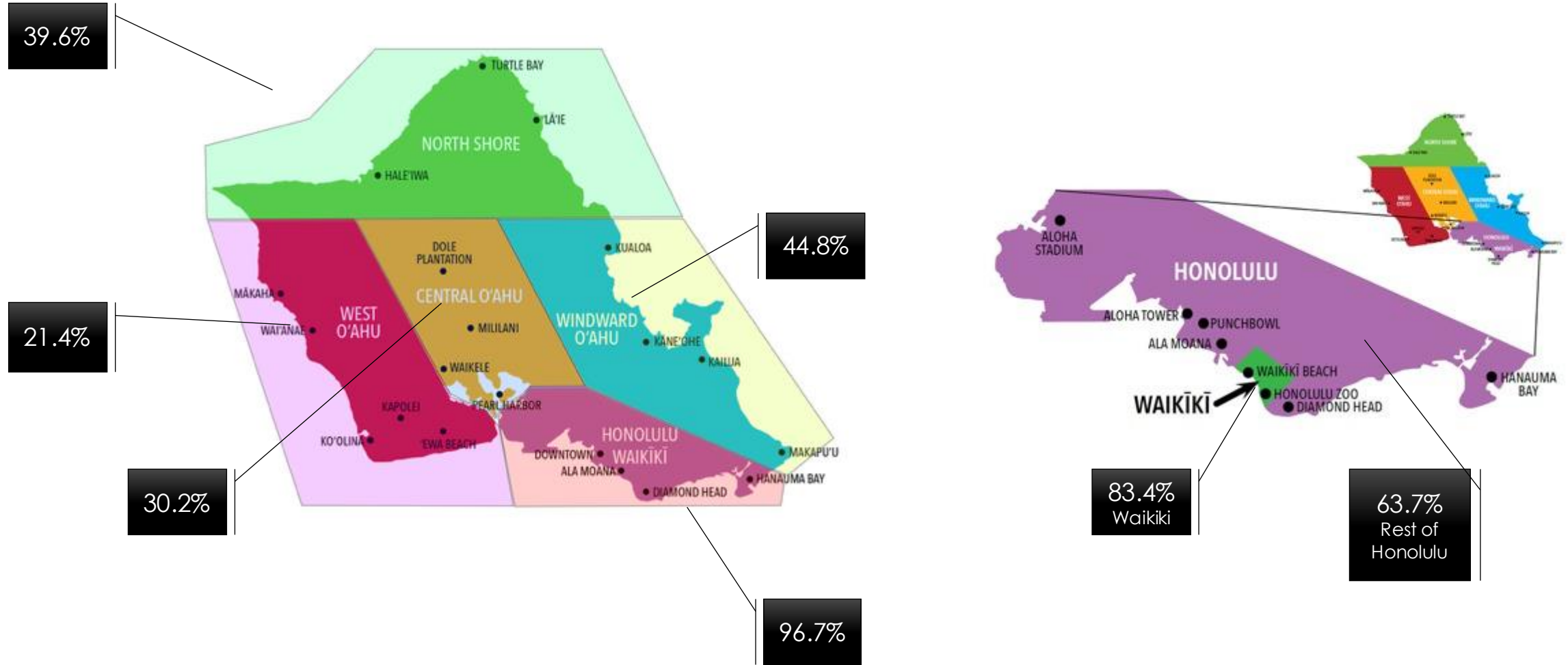
AREAS VISITED - O'AHU OCEANIA



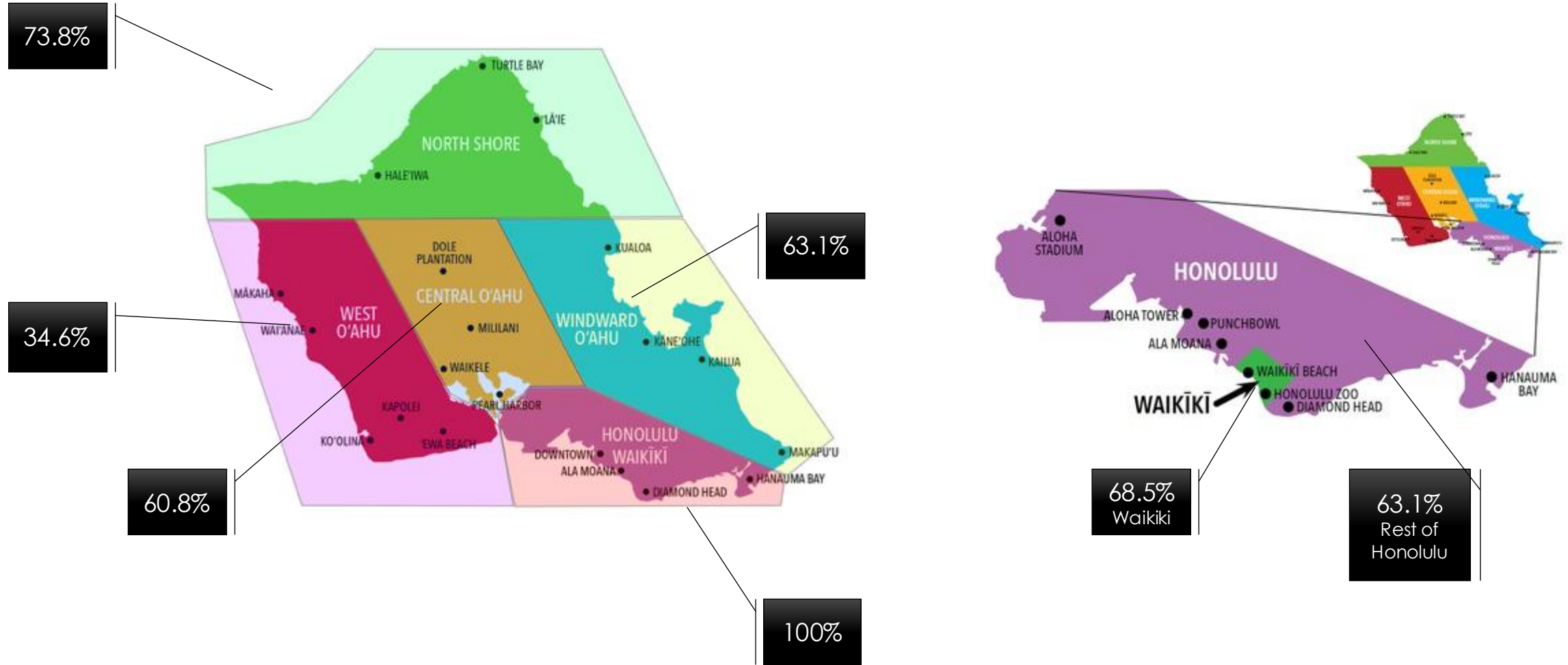
AREAS VISITED - O'AHU CHINA



AREAS VISITED - O'AHU KOREA



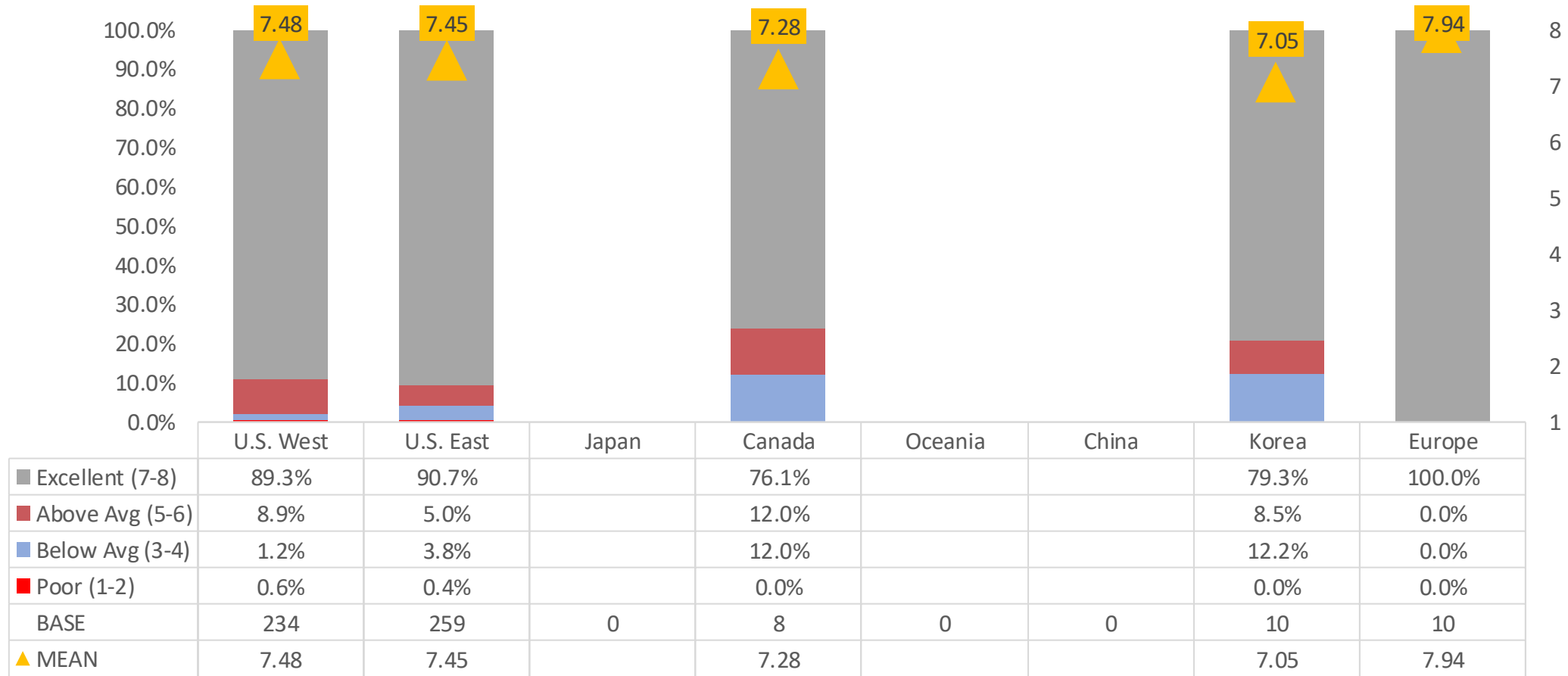
AREAS VISITED - O'AHU EUROPE



Section 8 – Kaua‘i

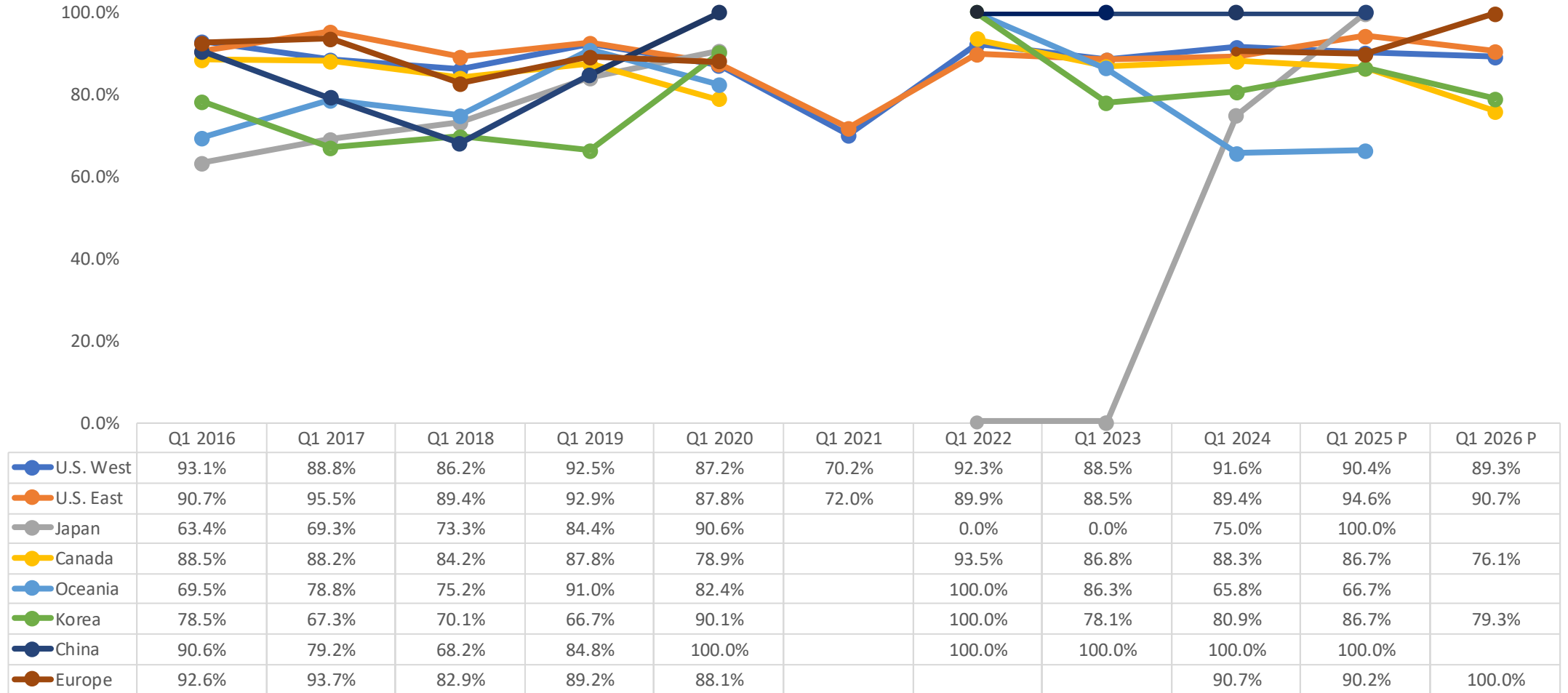
SATISFACTION - KAUA'I

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



SATISFACTION - KAUA'I

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



P= Preliminary Data

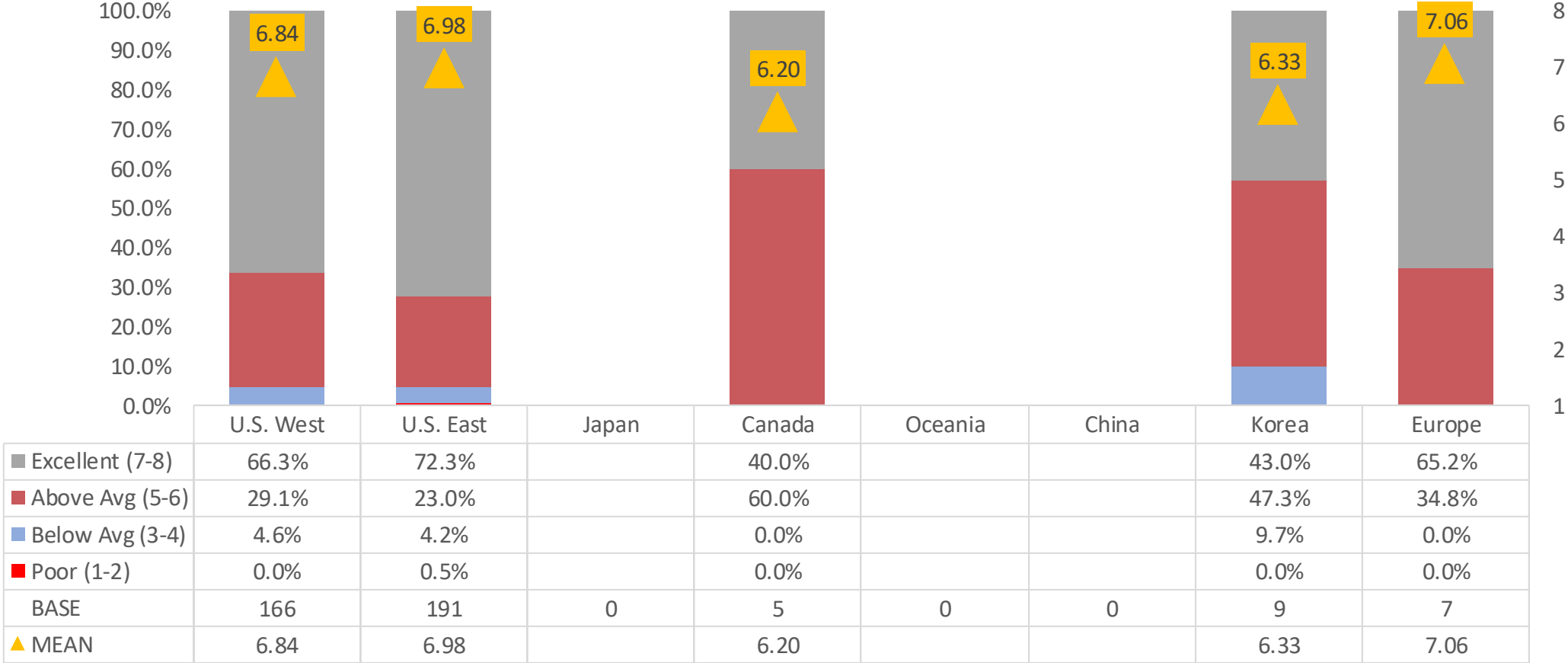
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?



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.

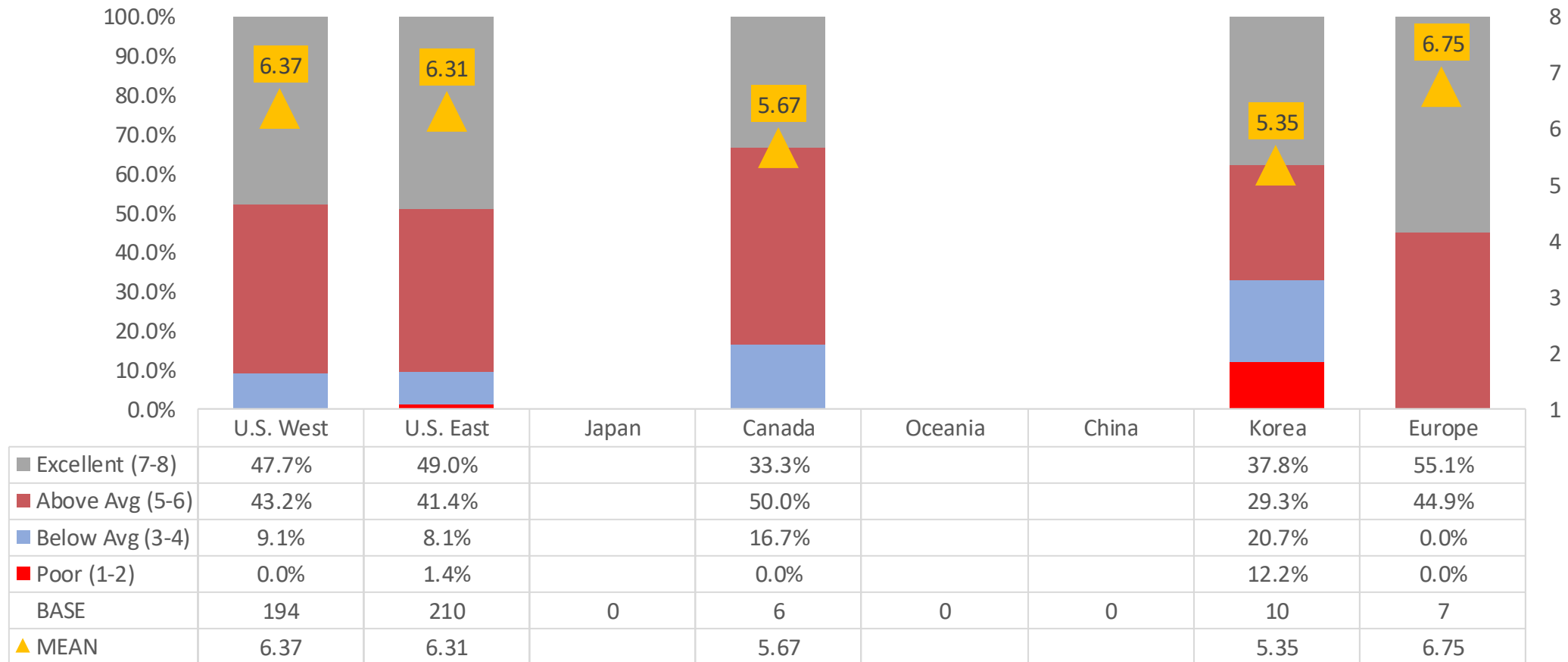
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



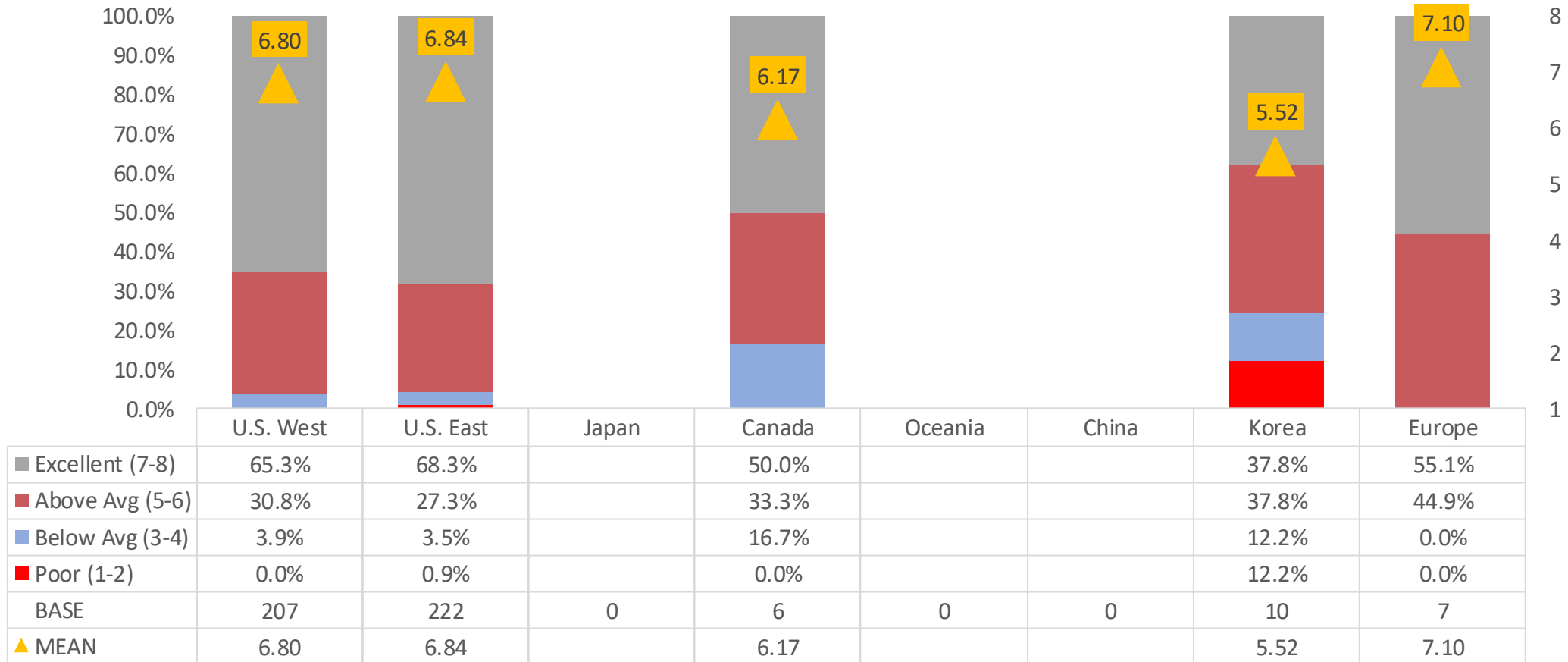
SHOPPING - KAUA'I

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



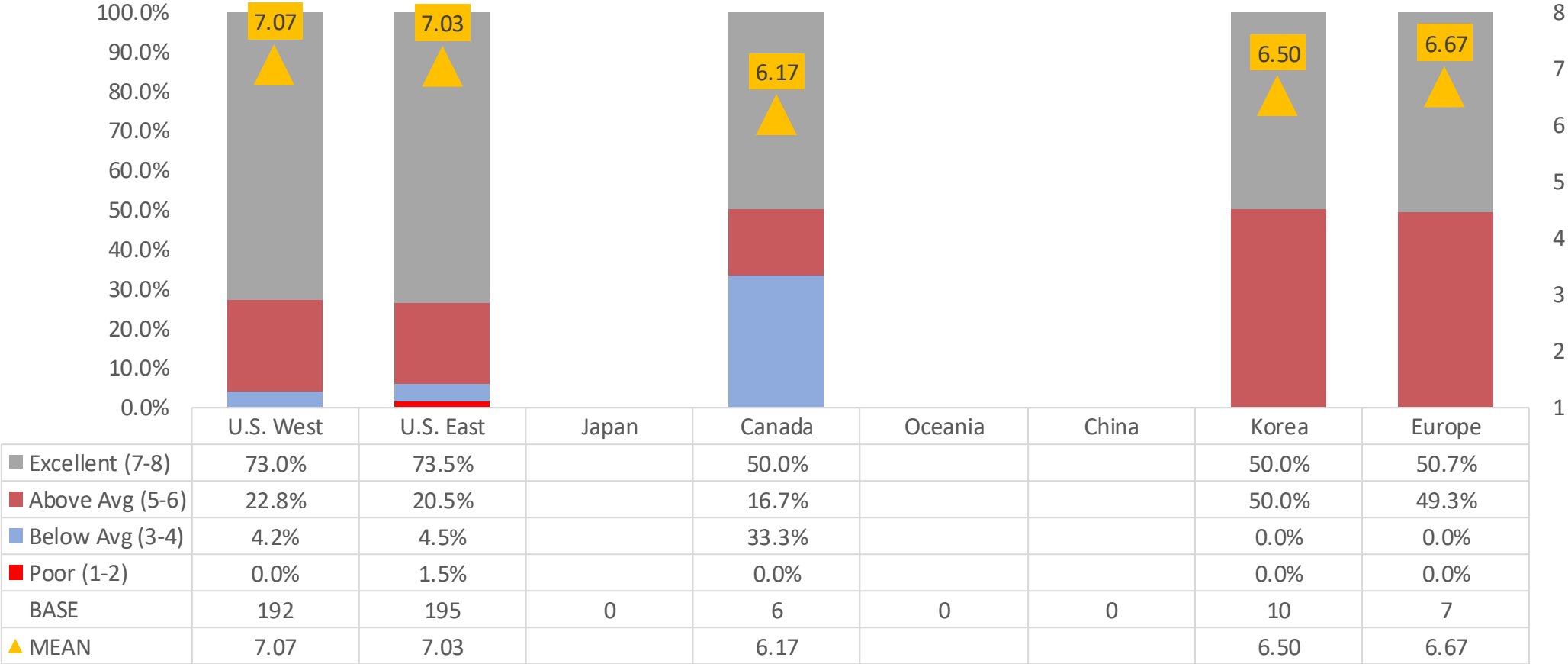
DINING/ FOOD & BEVERAGE - KAUA'I

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



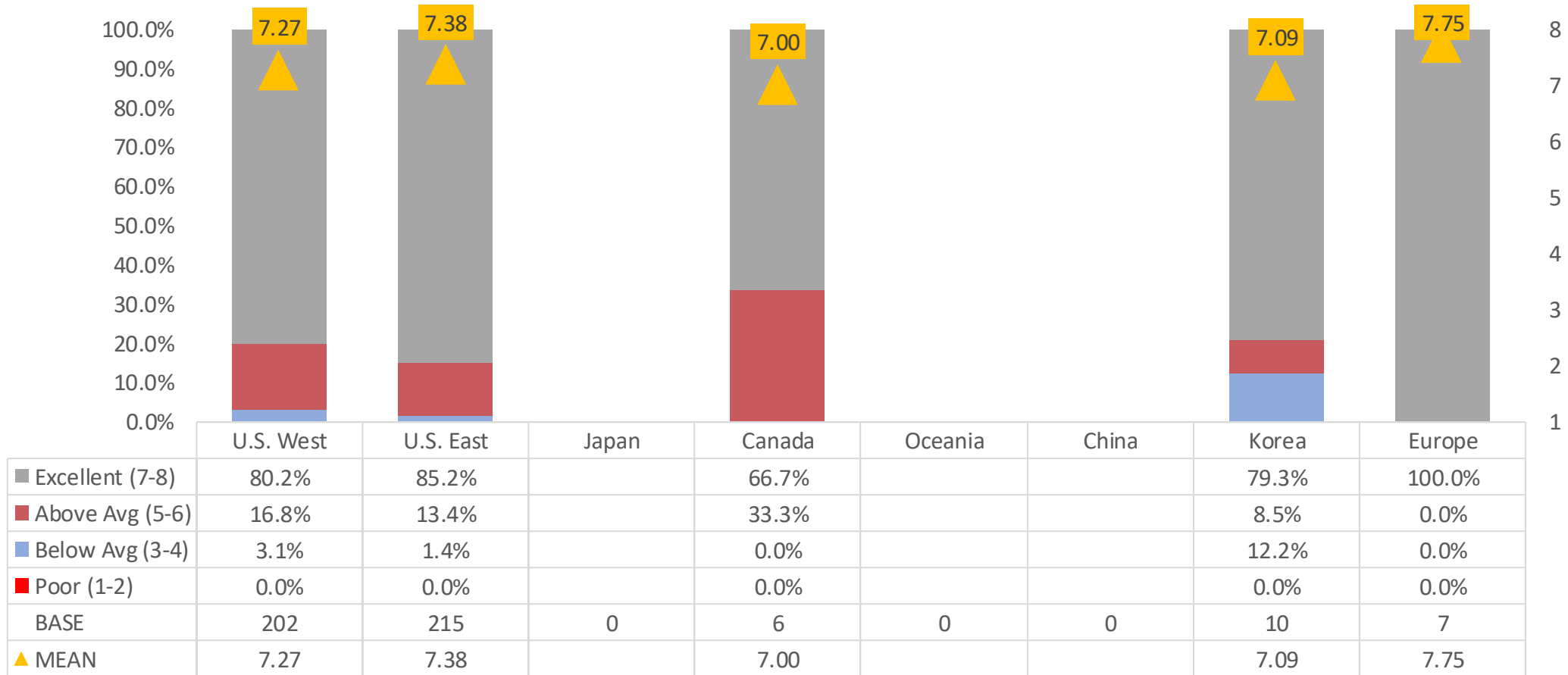
LODGING/ ACCOMMODATIONS - KAUA'I

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



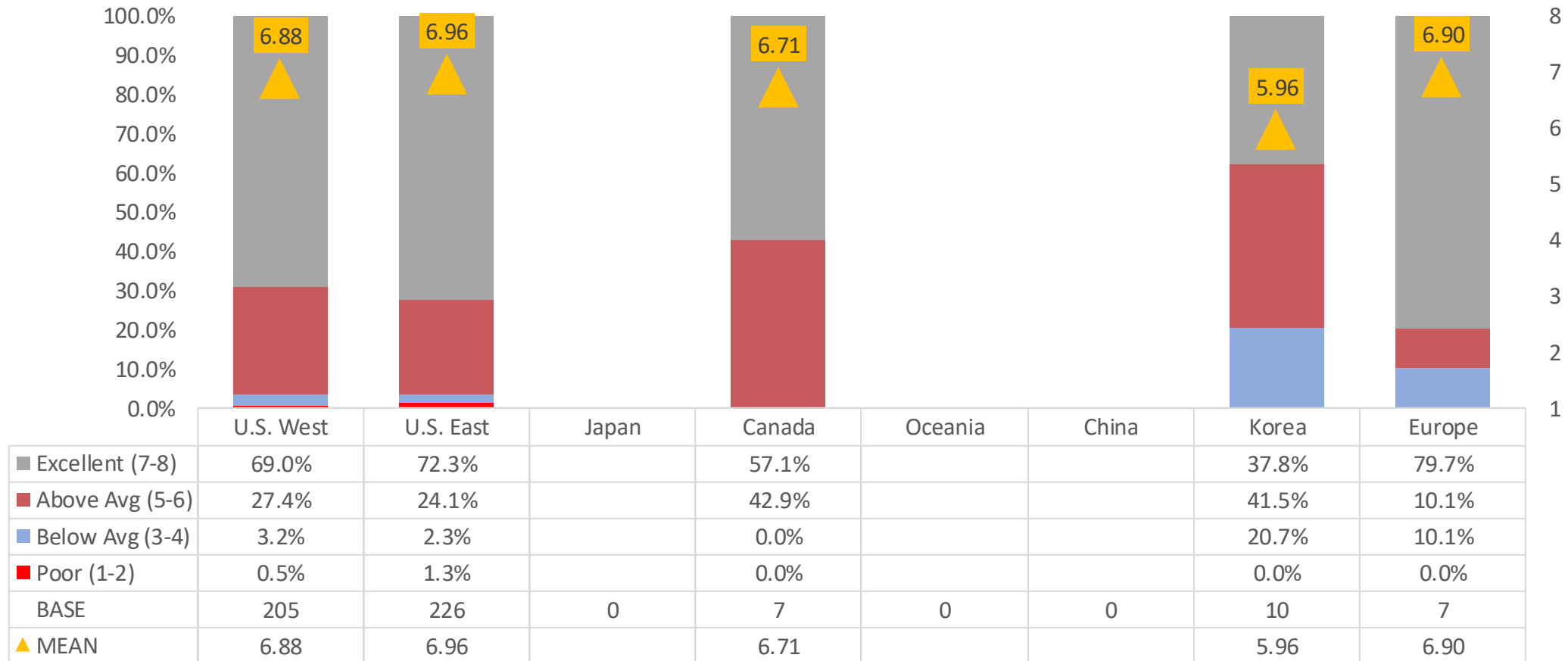
BEACHES - KAUA'I

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



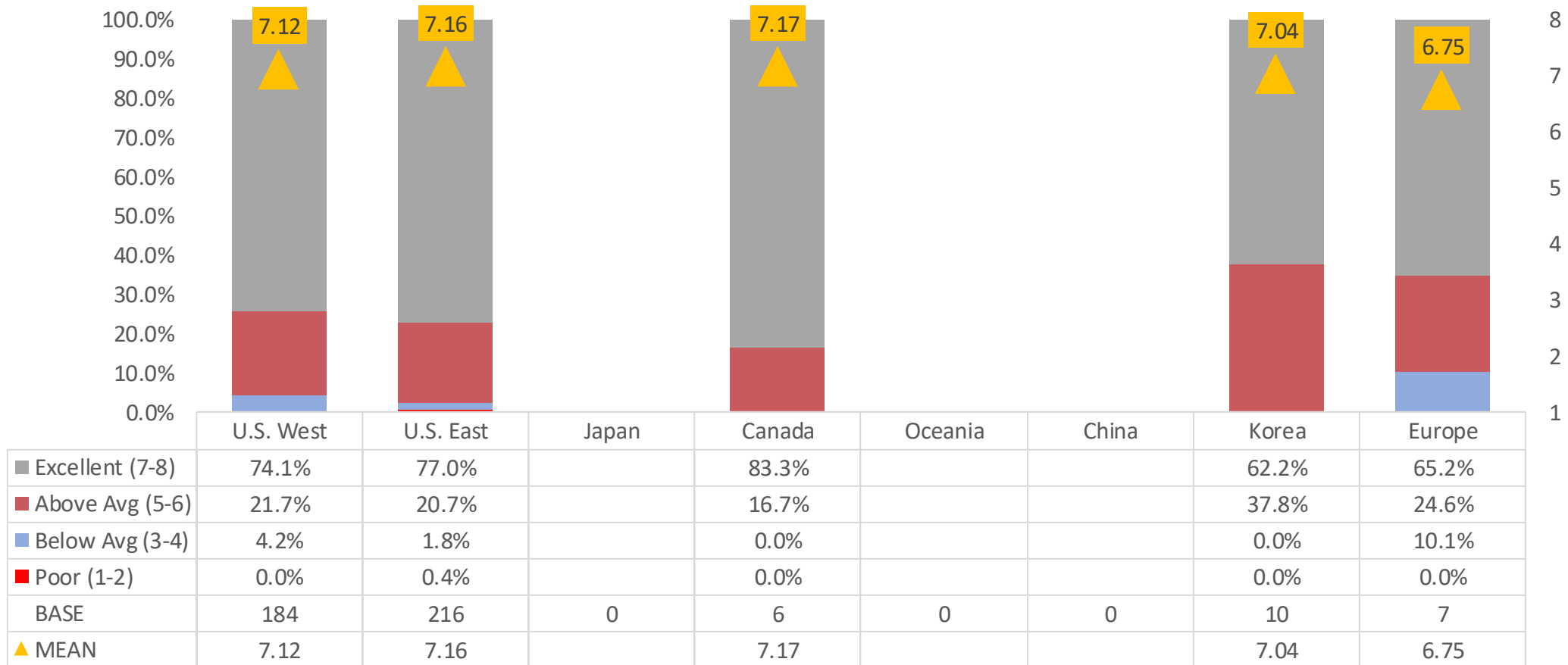
PUBLIC AREAS - KAUA'I

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



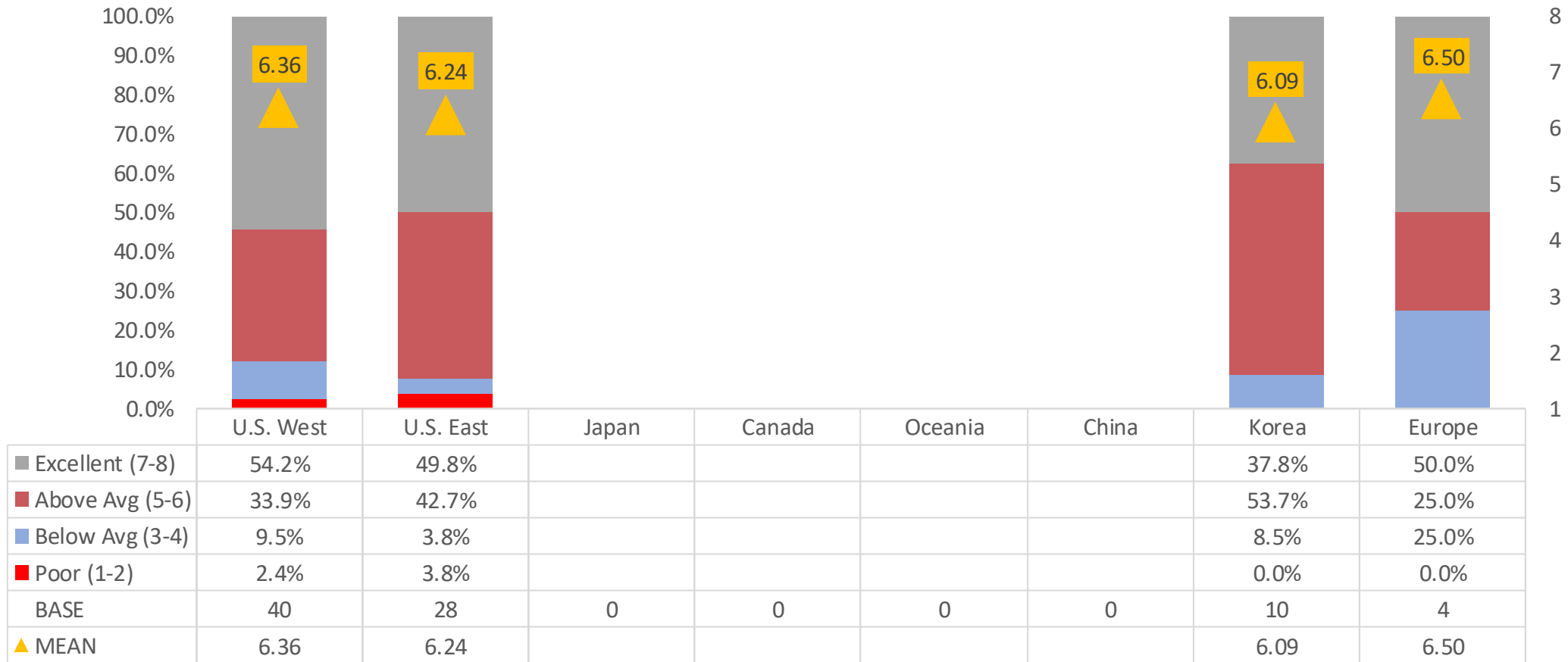
PARKS - KAUA'I

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



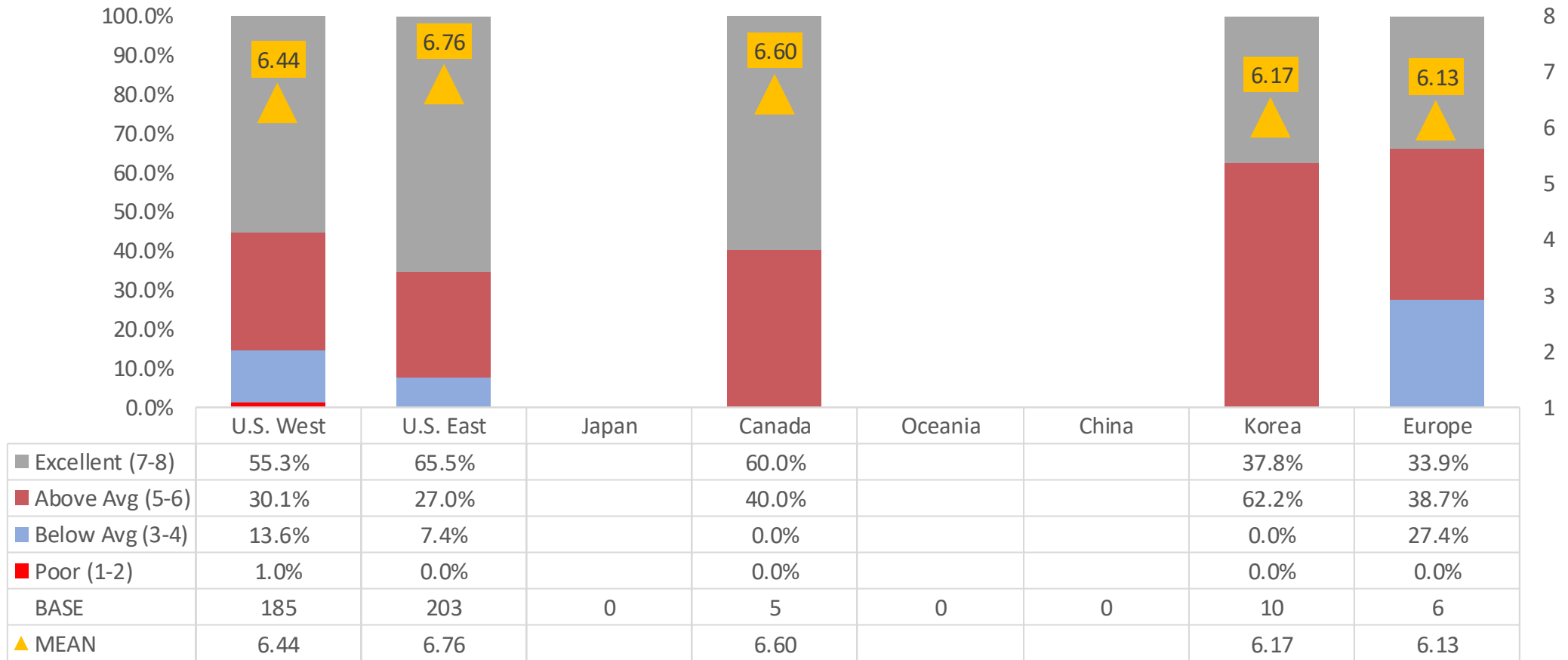
ROADS - KAUA'I

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



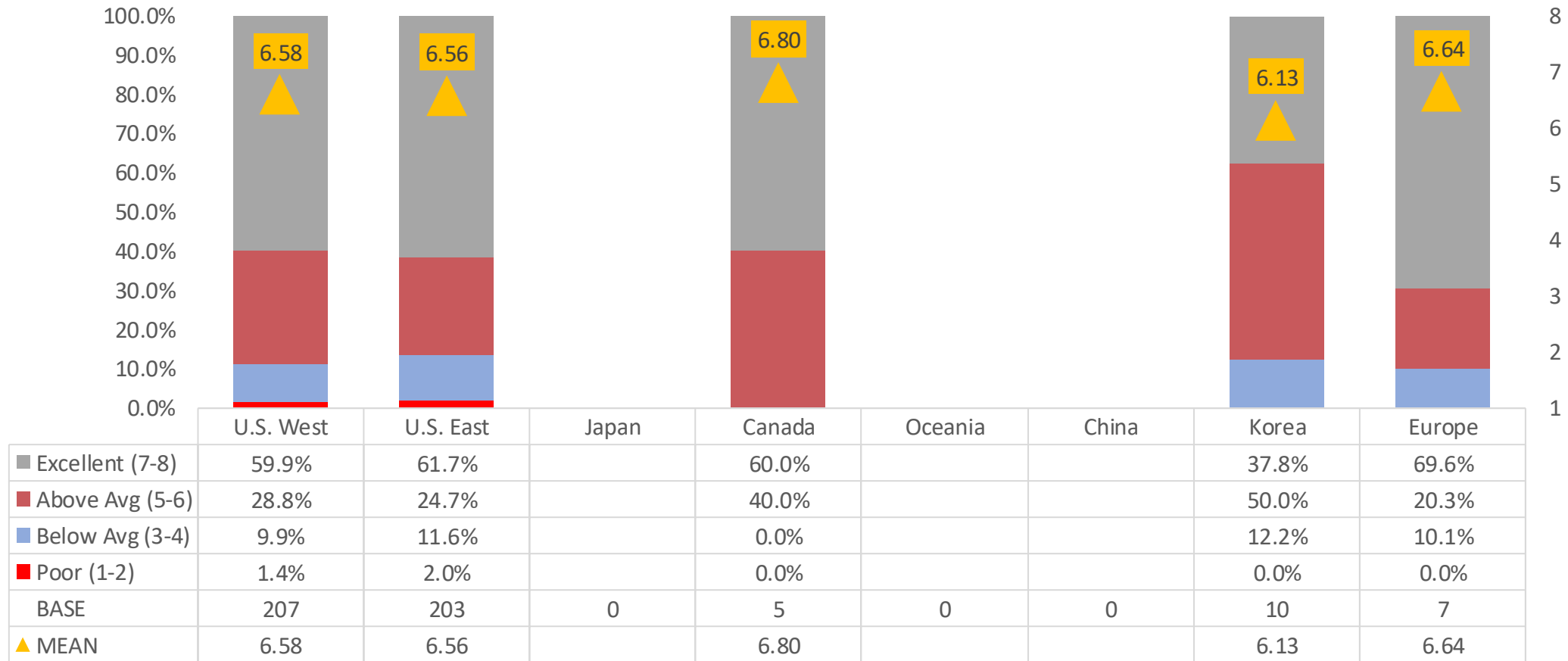
TRANSPORTATION ON ISLAND - KAUA'I

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



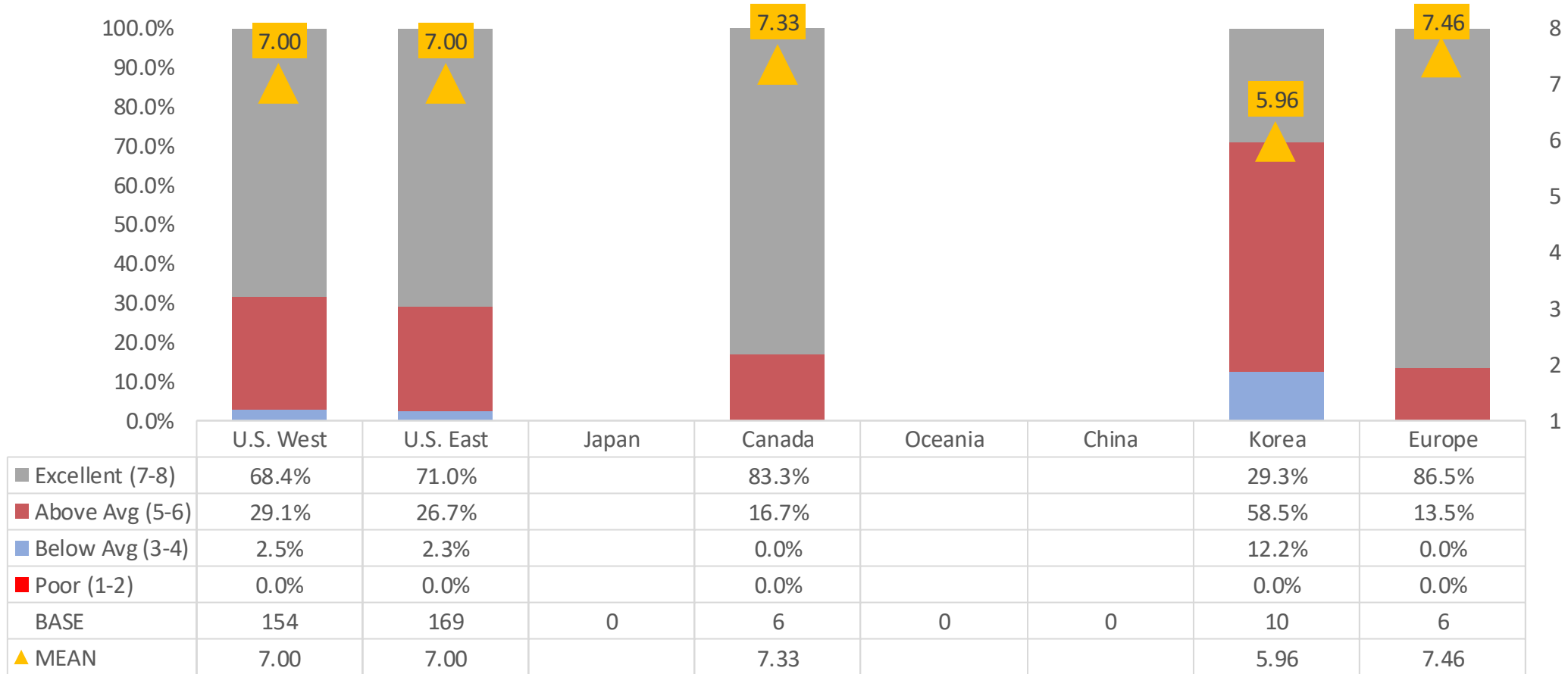
AIRPORT - KAUA'I

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



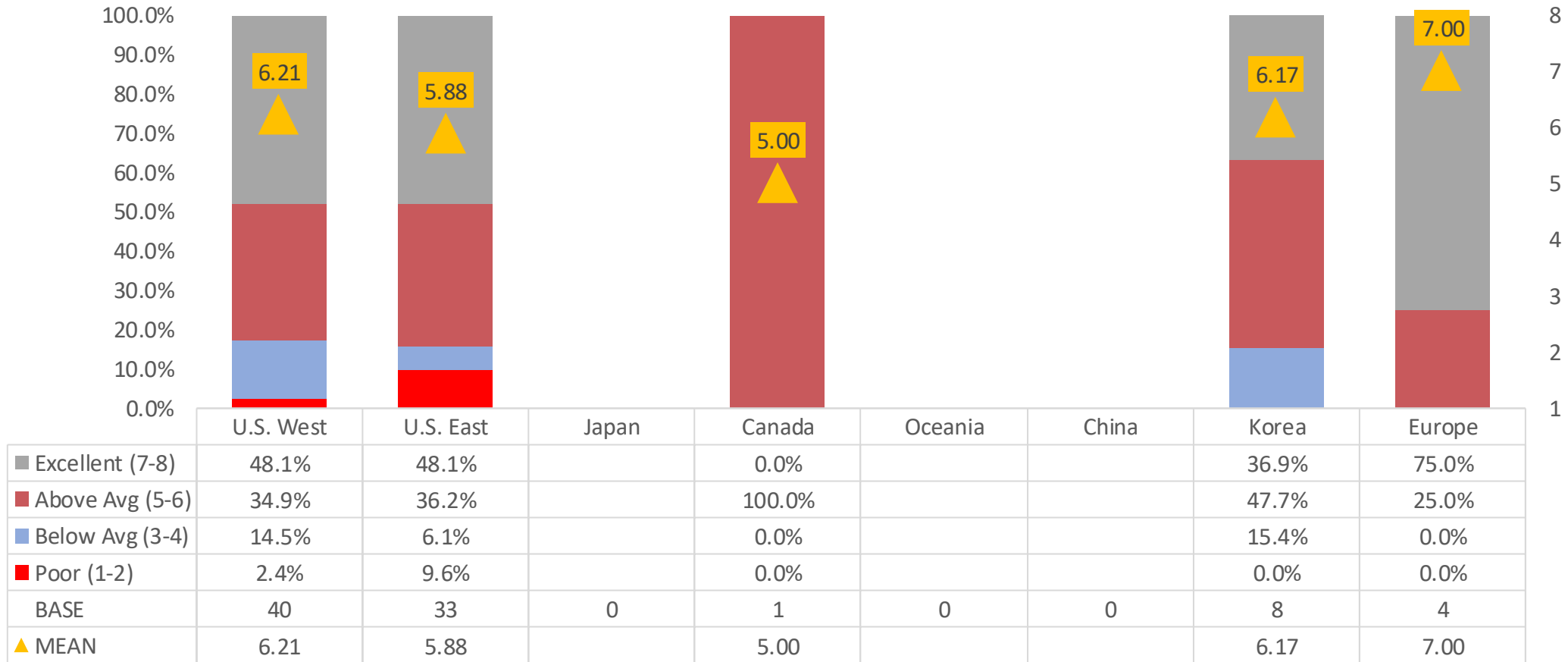
CULTURAL ACTIVITIES - KAUA'I

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



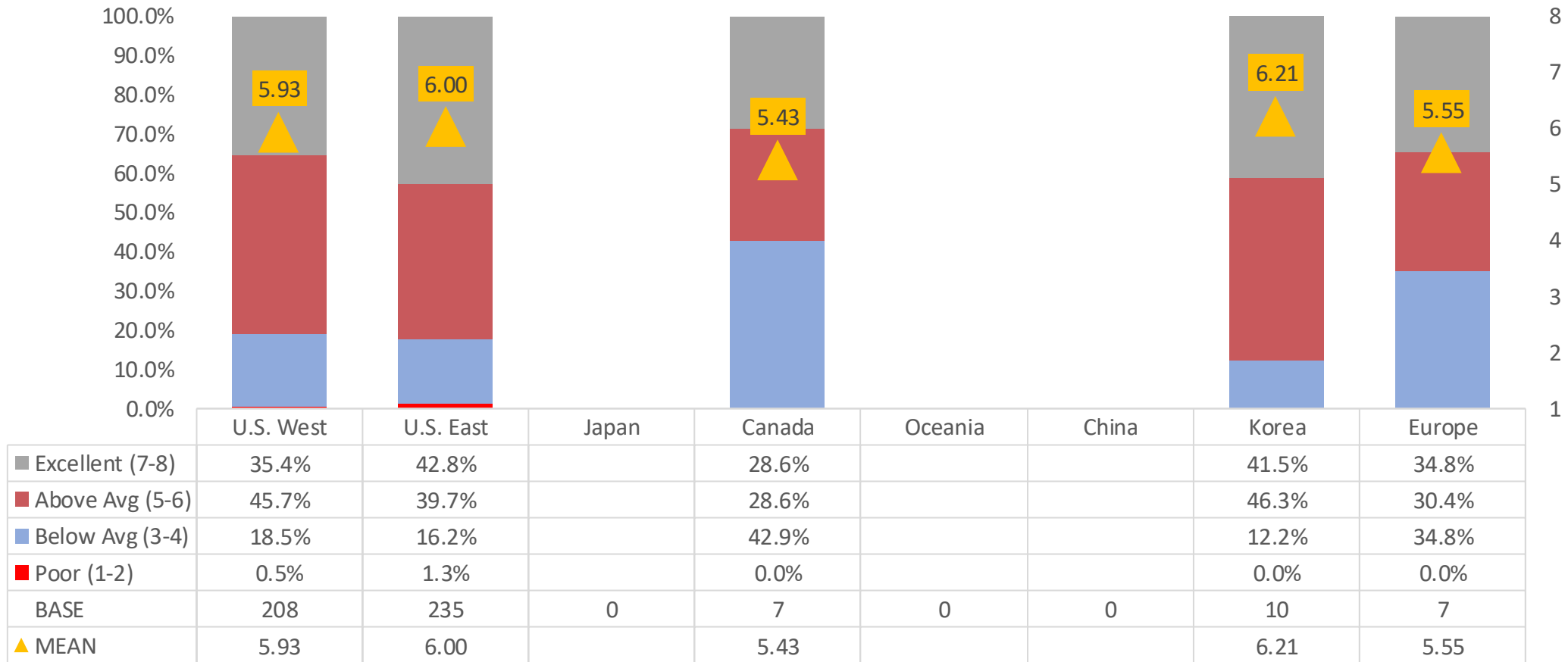
VOLUNTEER ACTIVITIES - KAUA'I

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



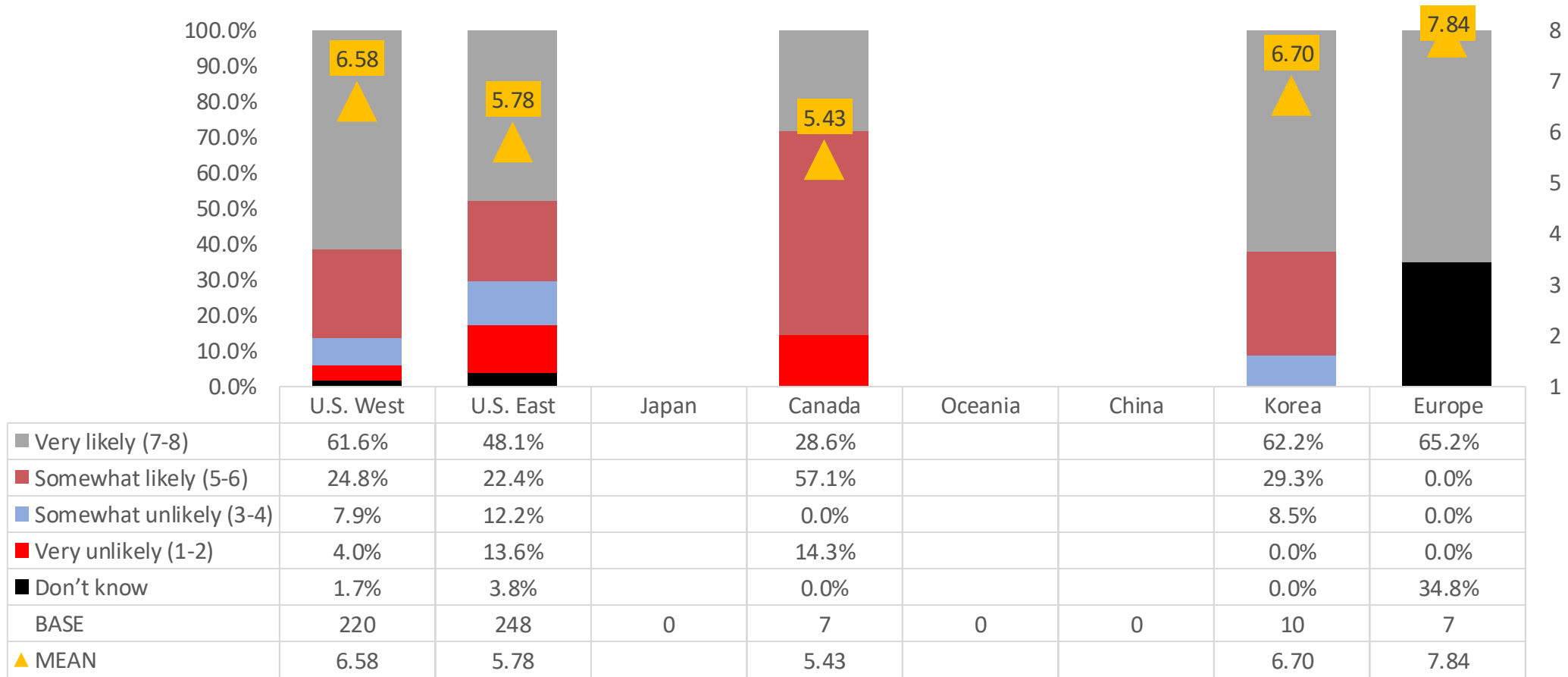
VALUE FOR THE MONEY - KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

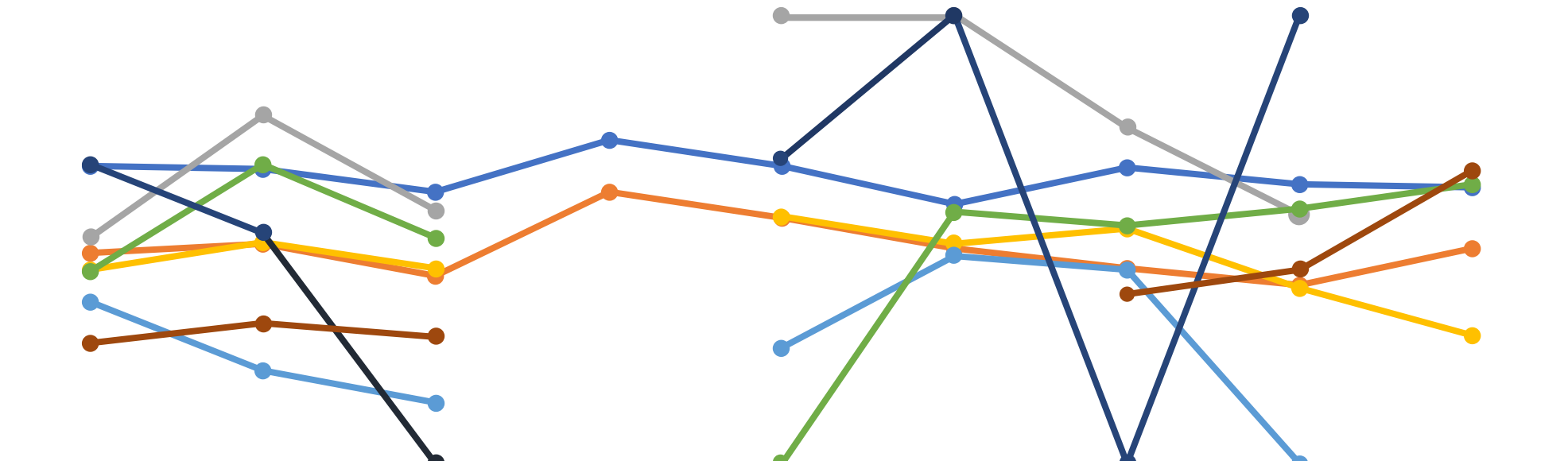
8-pt Rating Scale
8 = Very likely / 1 = Very unlikely



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

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



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	66.3%	65.8%	60.5%	72.2%	66.2%	57.8%	66.0%	62.2%	61.6%
U.S. East	46.8%	48.8%	41.9%	60.7%	54.6%	47.8%	43.5%	39.9%	48.1%
Japan	50.4%	77.6%	56.4%		100.0%	100.0%	75.0%	55.4%	
Canada	43.1%	49.3%	43.5%		55.0%	49.0%	52.3%	39.0%	28.6%
Oceania	35.9%	20.7%	13.4%		25.7%	46.3%	43.1%	0.0%	
Korea	42.8%	66.7%	50.3%		0.0%	56.1%	53.2%	56.9%	62.2%
China	66.7%	51.5%	0.0%		67.9%	100.0%	0.0%	100.0%	
Europe	26.7%	31.1%	28.3%				37.7%	43.3%	65.2%

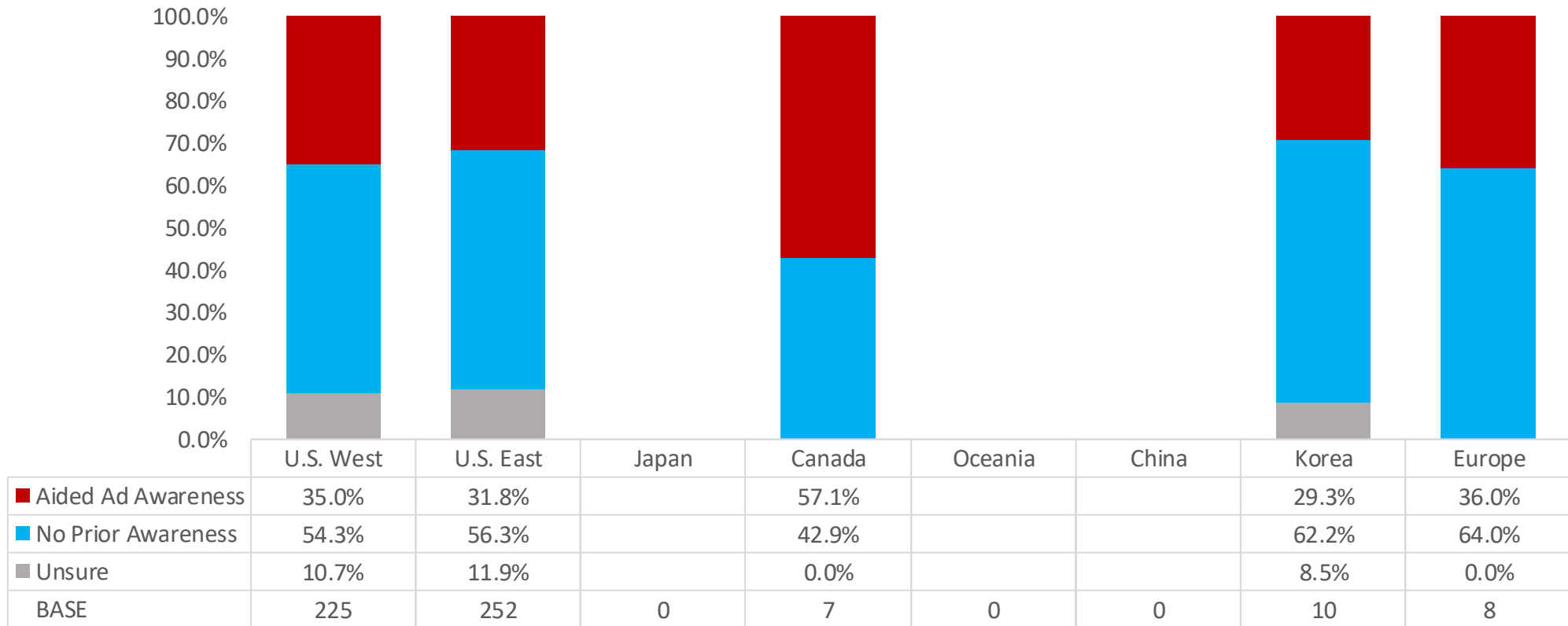
P= Preliminary Data

Q. How likely are you to visit Kaua'i again in the next five years?

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.



AIDED ADVERTISING AWARENESS - KAUA'I

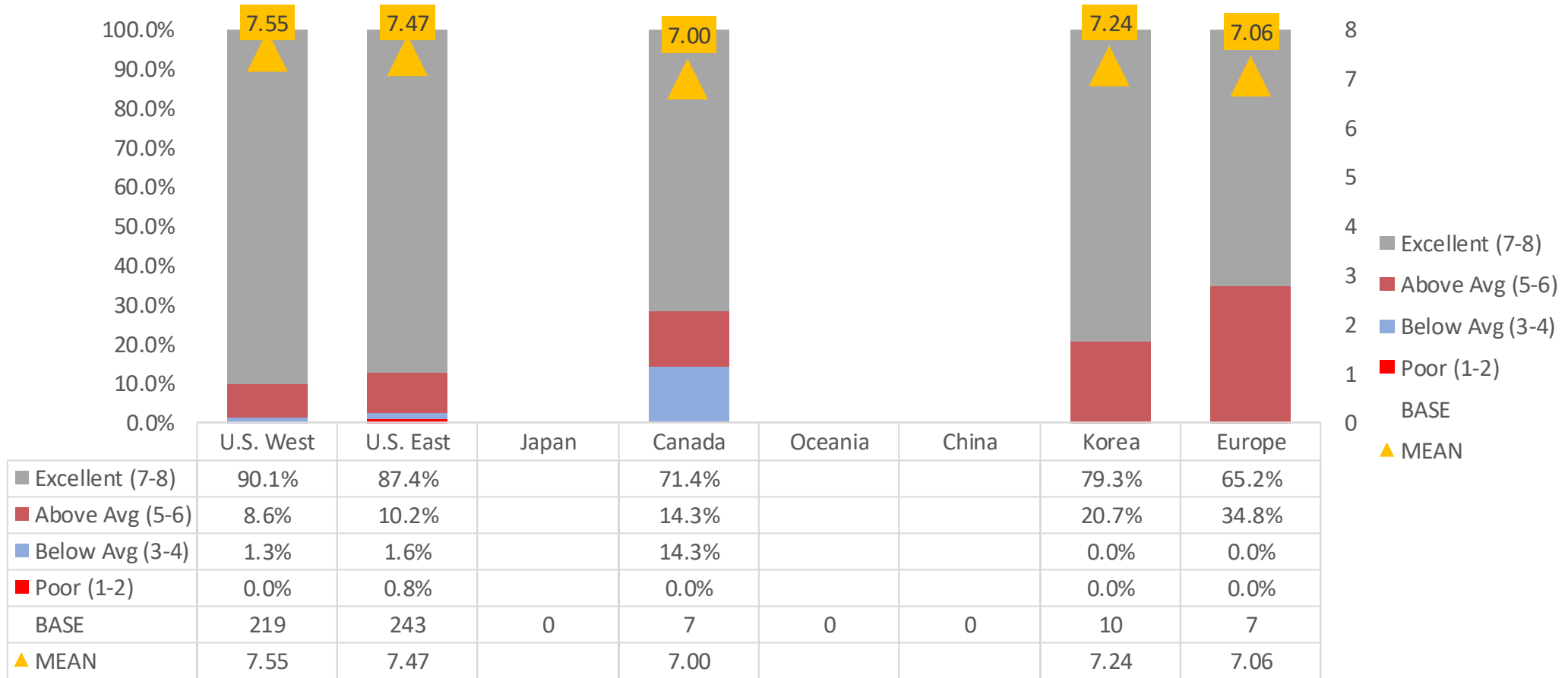


MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai'i	8.0%	12.0%		14.3%			41.5%	10.1%
Hawaiian music	7.6%	10.6%		0.0%			8.5%	44.9%
Social media posts and videos	14.4%	17.3%		28.6%			17.0%	20.3%
Outdoor or sporting activities and events	11.4%	9.5%		0.0%			17.0%	0.0%
Hawaiian cultural experiences and Hawaiian cultural events	16.0%	19.8%		14.3%			20.7%	30.4%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	40.4%	58.3%		14.3%			20.7%	65.2%
Attend a festival or other event	2.9%	2.7%		0.0%			0.0%	0.0%
BASE	225	251	0	7	0	0	10	7

FRIENDLINESS OF KAUA‘I RESIDENTS

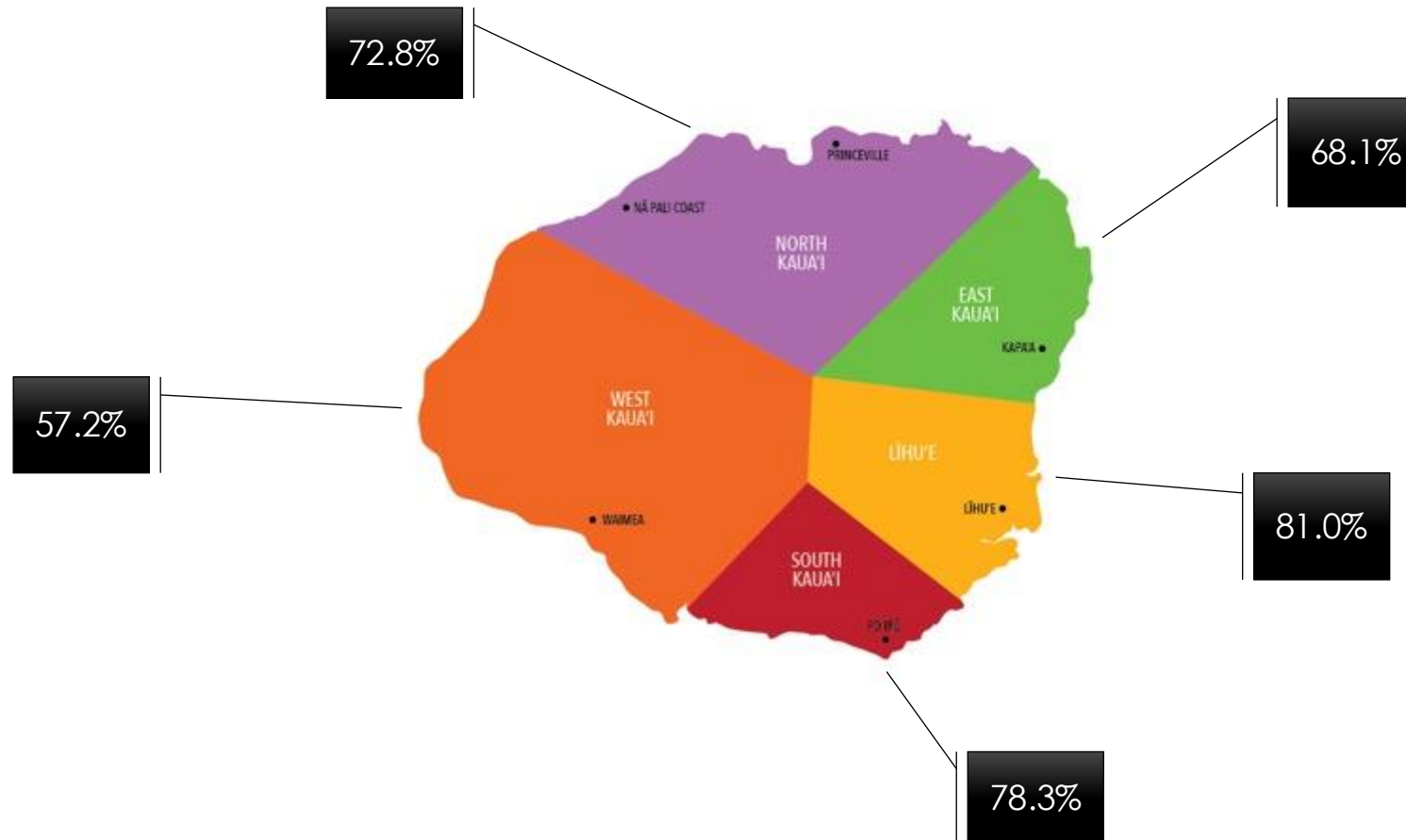
8-pt Rating Scale
8=Excellent / 1=Poor



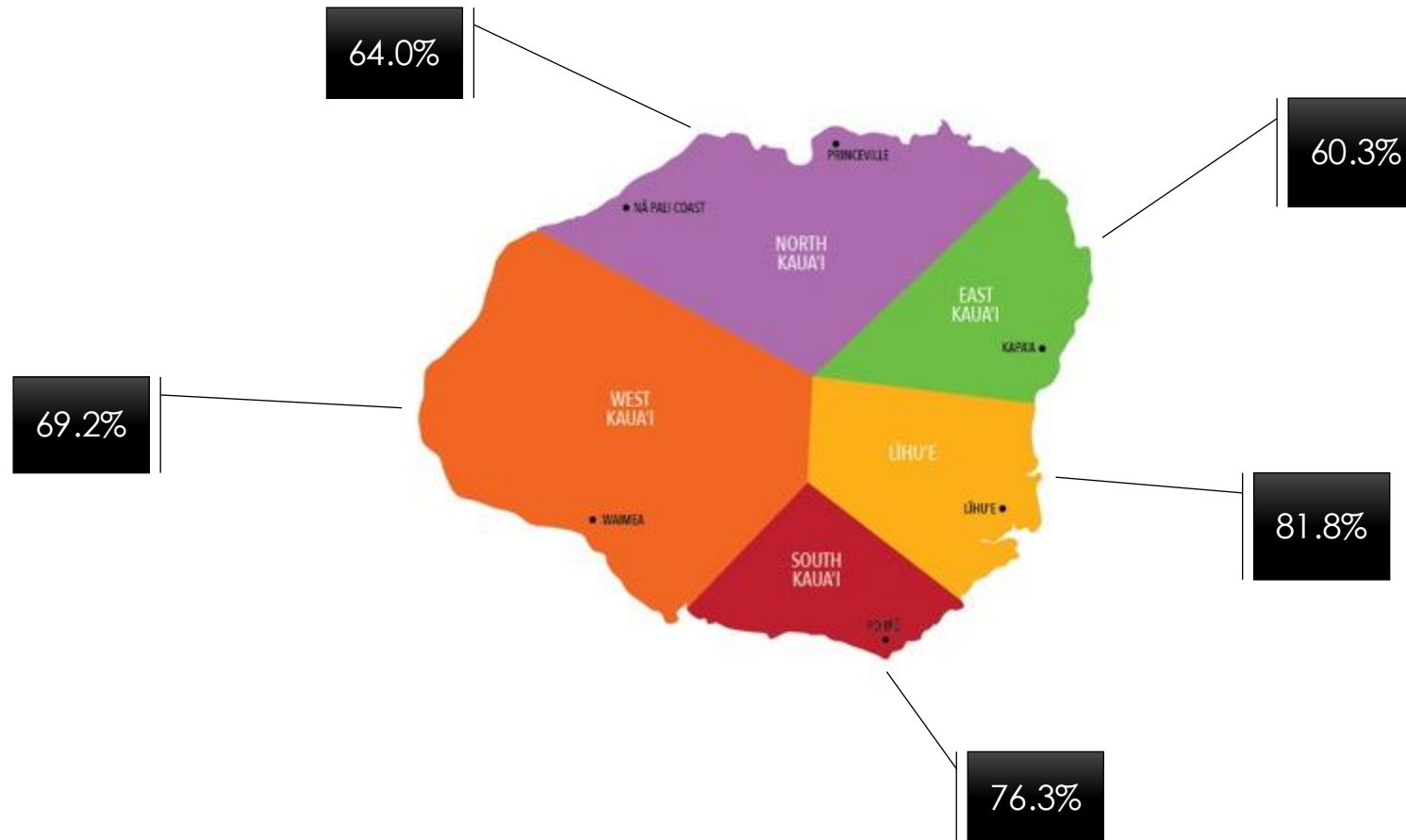
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Repeat Visitor	51.3%	34.4%		57.1%			0.0%	20.3%
Friend recommendation	19.1%	20.4%		0.0%			29.3%	20.3%
Cruise line stop/layover	4.4%	13.4%		28.6%			0.0%	0.0%
Attending Conference/ Event	4.8%	2.0%		0.0%			0.0%	0.0%
Travel Agent	2.6%	4.9%		0.0%			20.7%	0.0%
Visiting Family/ Friends	3.8%	3.0%		0.0%			0.0%	0.0%
BASE	214	237	0	7	0	0	10	7

AREAS VISITED - KAUA'I U.S. WEST

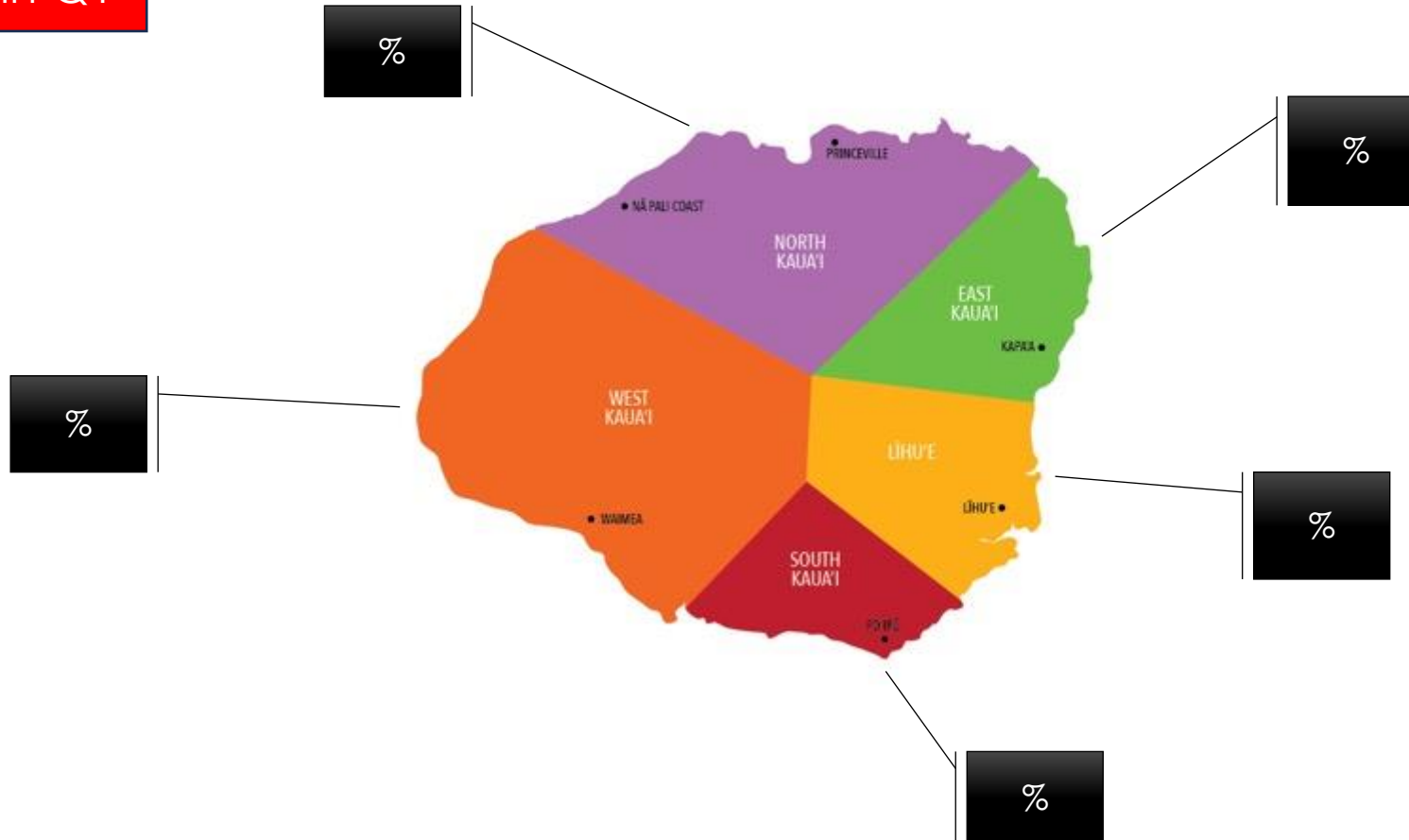


AREAS VISITED - KAUA'I U.S. EAST

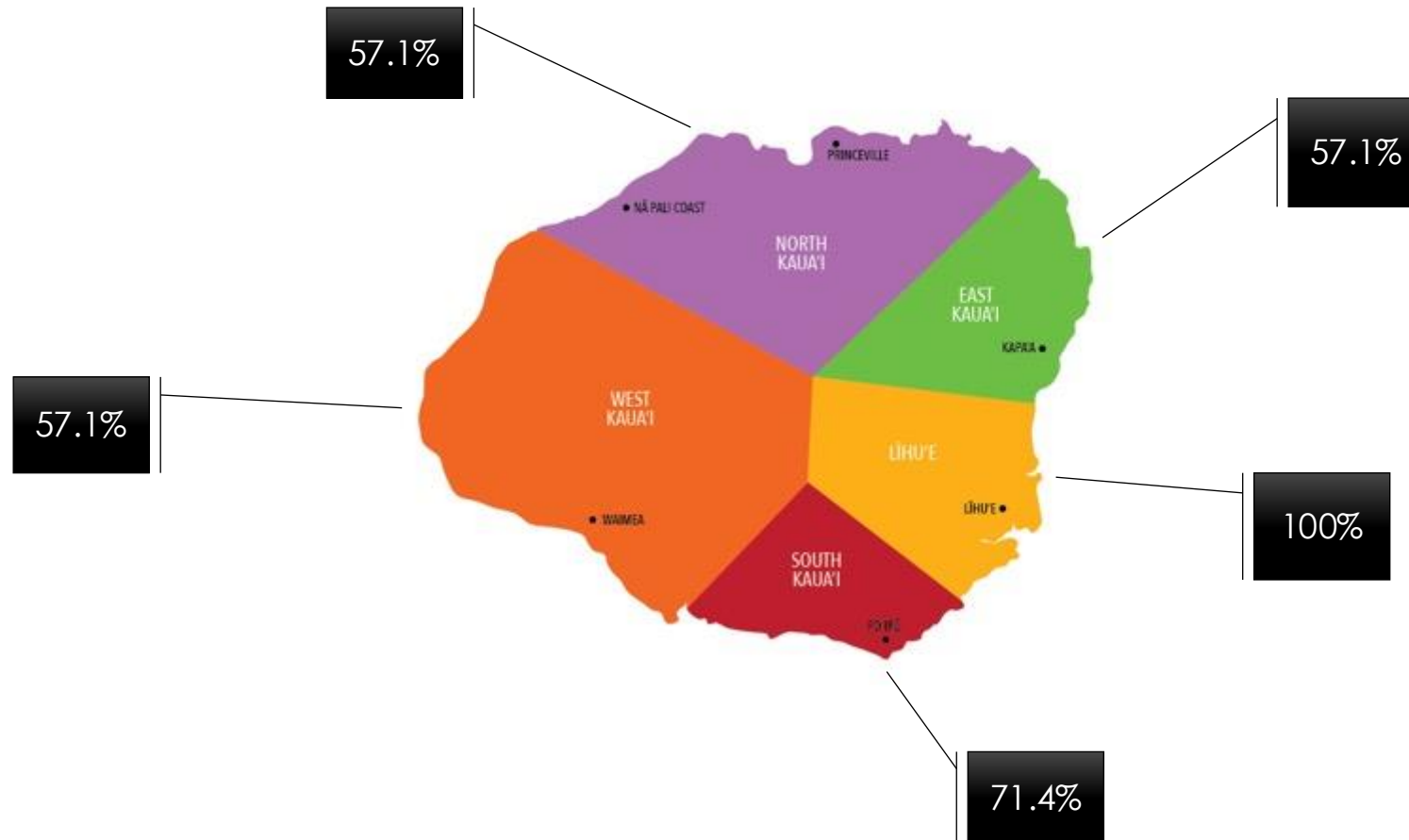


AREAS VISITED - KAUA'I JAPAN

No visitors surveyed in Q1

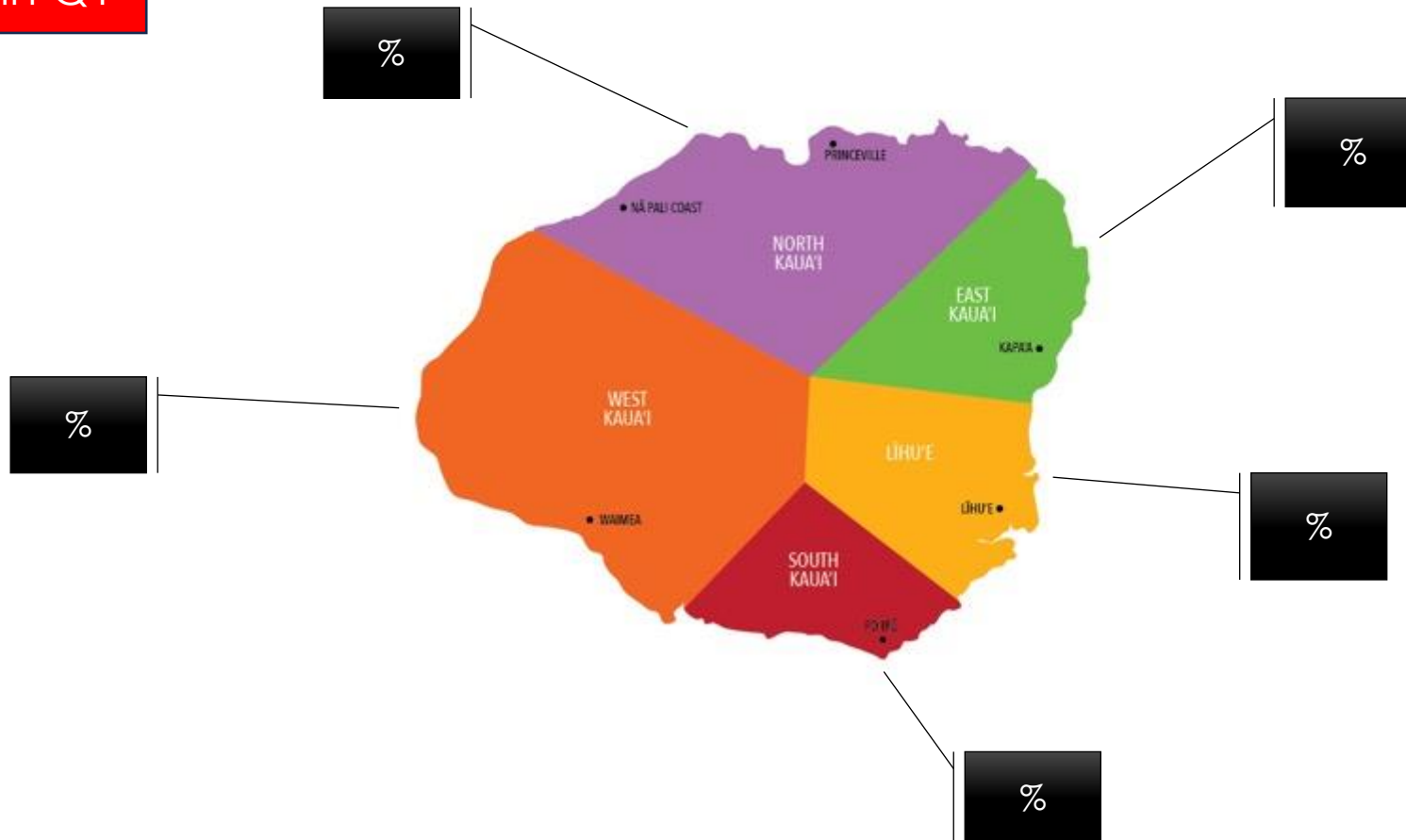


AREAS VISITED - KAUA'I CANADA



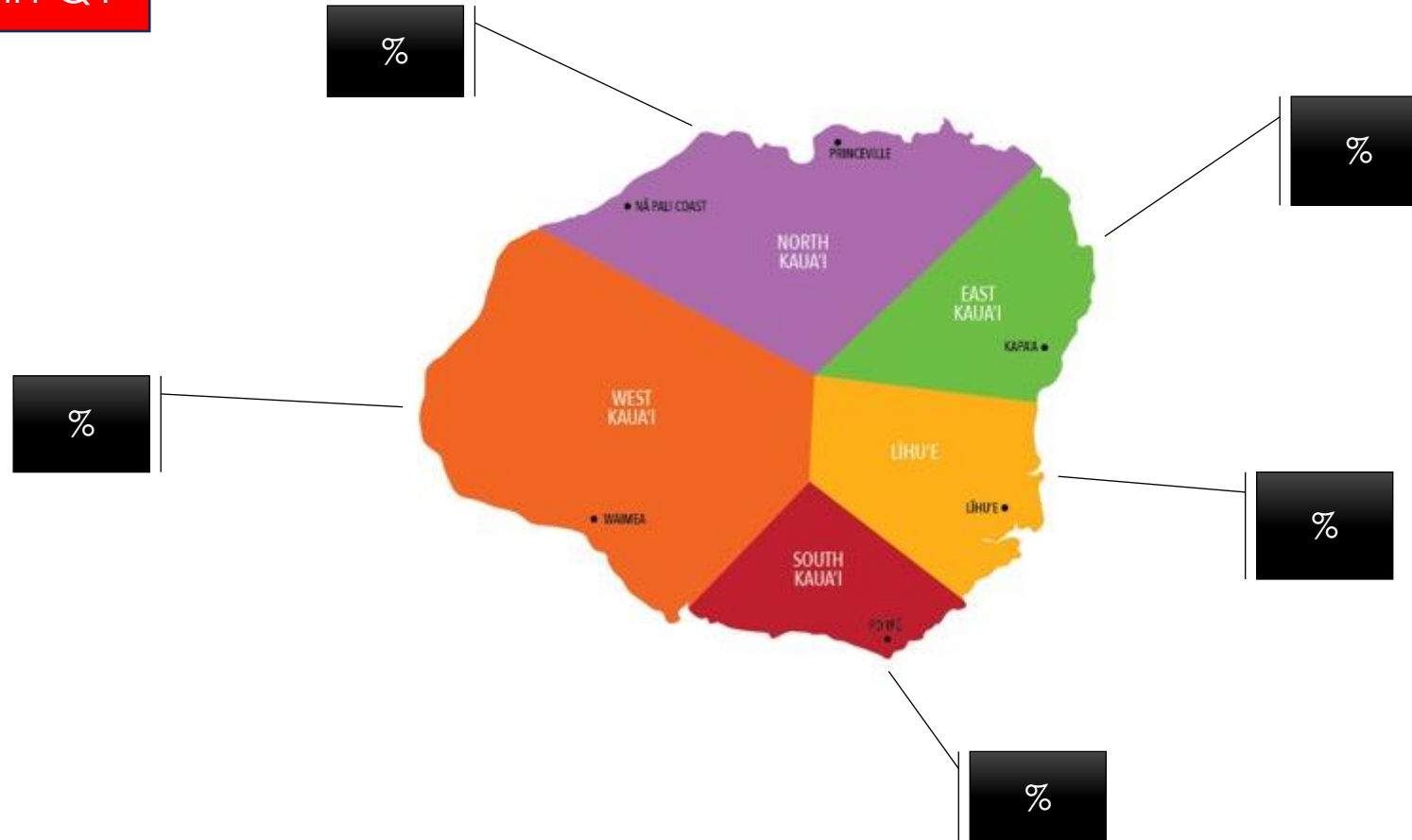
AREAS VISITED - KAUA'I OCEANIA

No visitors surveyed in Q1

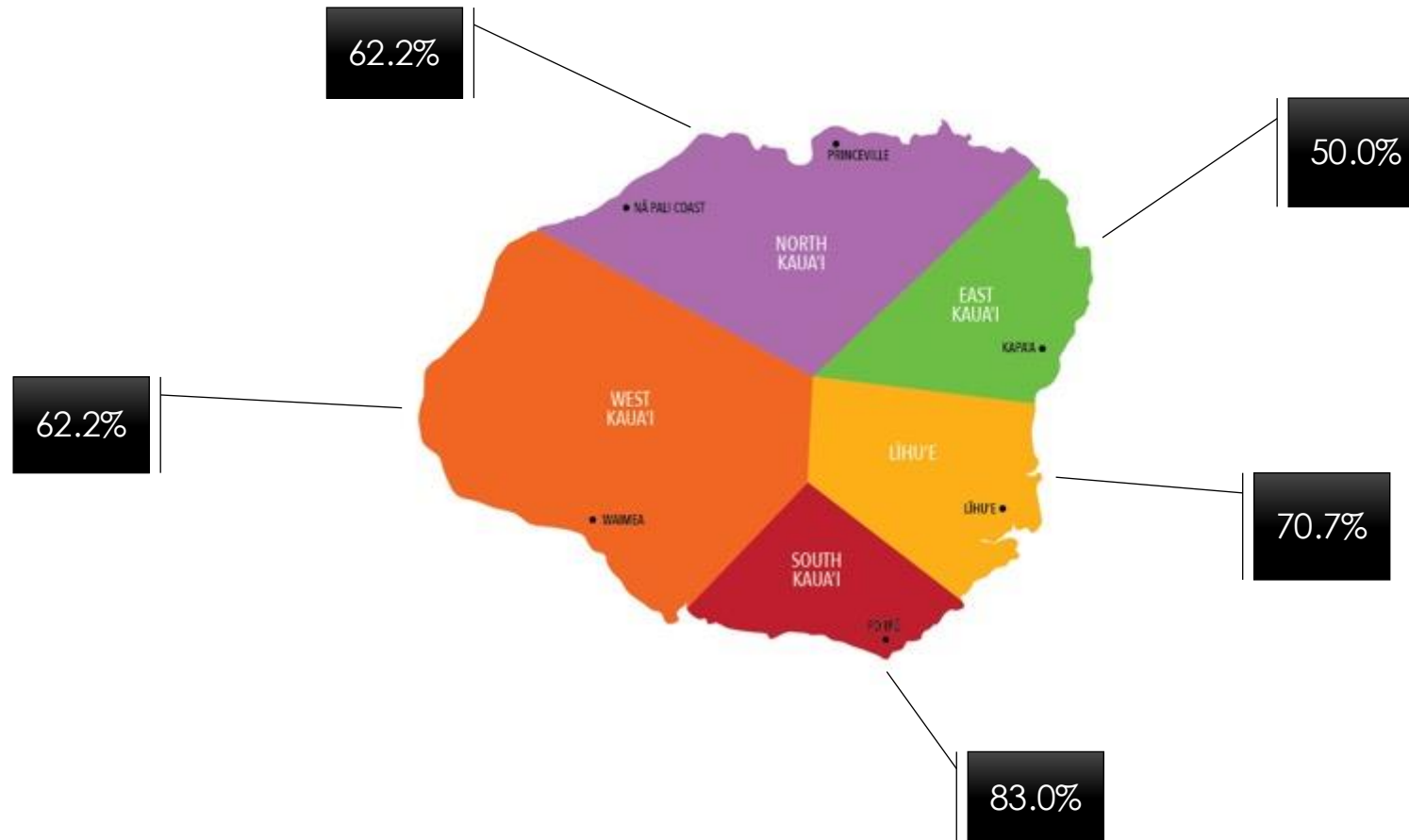


AREAS VISITED - KAUA'I CHINA

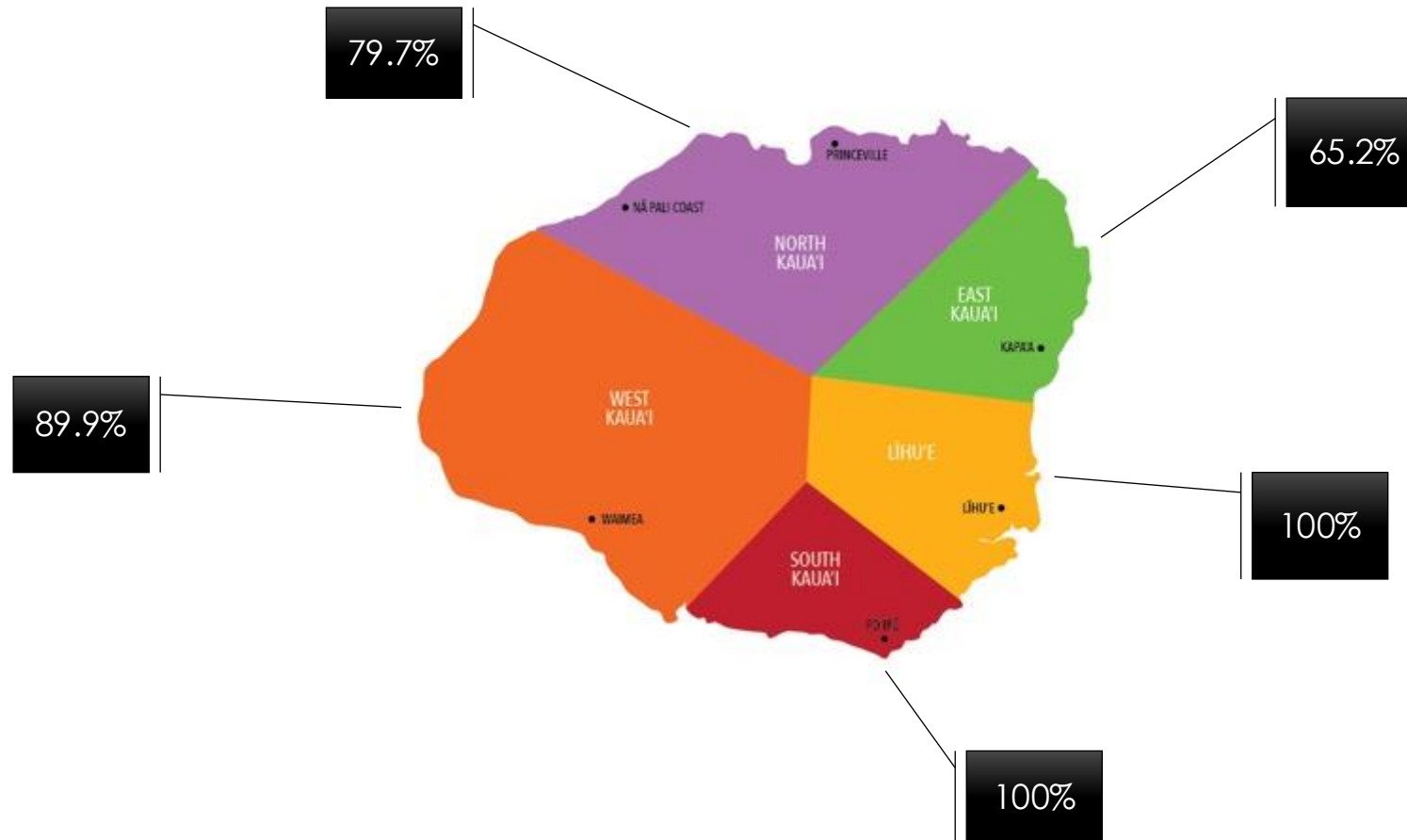
No visitors surveyed in Q1



AREAS VISITED - KAUA'I KOREA



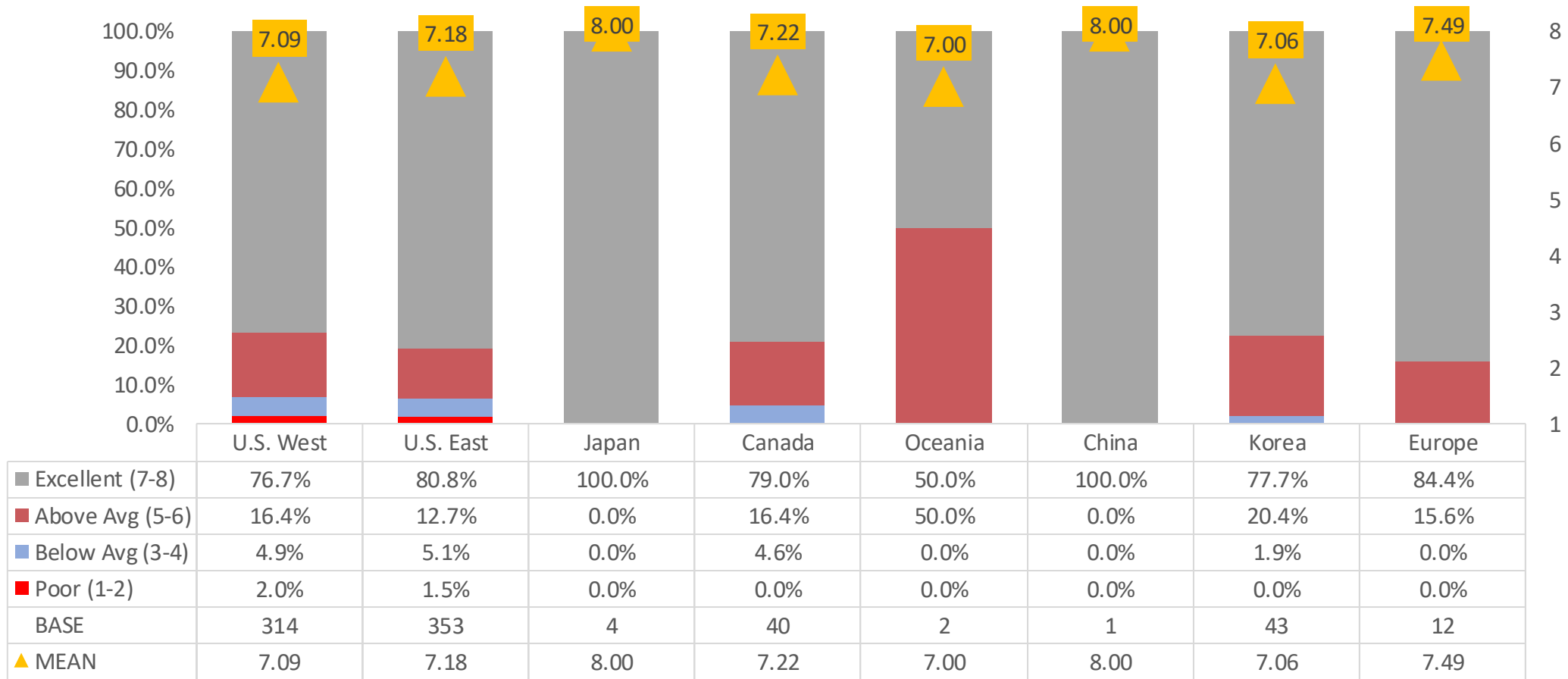
AREAS VISITED - KAUA'I EUROPE



Section 9 – Maui

SATISFACTION - MAUI

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

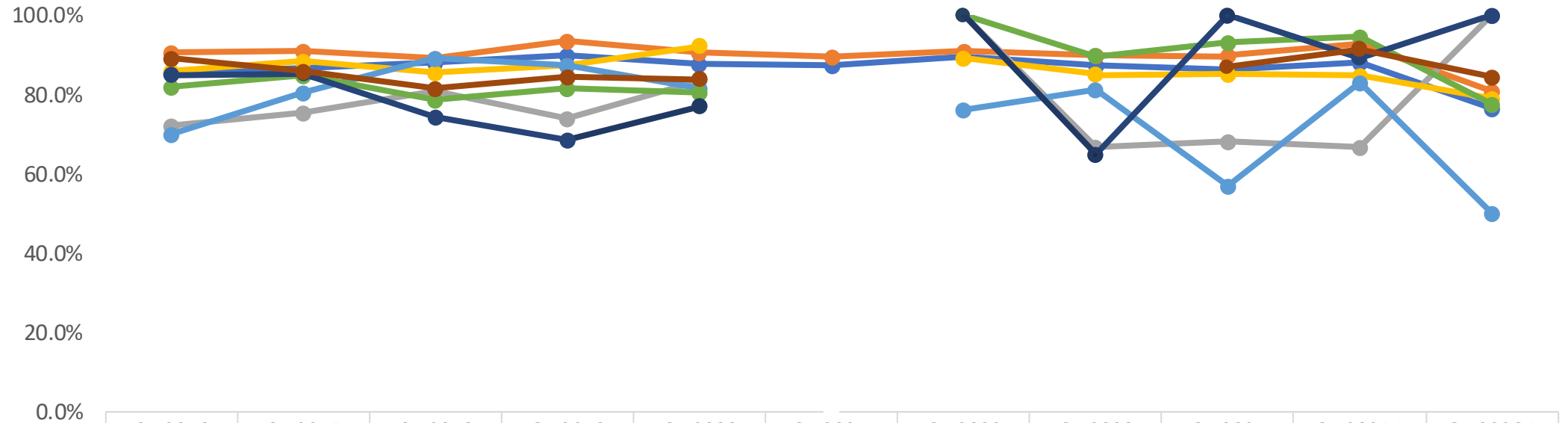


SATISFACTION - MAUI

- **Gender:** Female visitors from **U.S. West** were more satisfied with Maui overall compared to their male counterparts.
- **Trips to Hawaii:** Repeat visitors from **U.S. West** were more satisfied with their stay on Maui than first-time visitors.
- **Household Income:** Respondents from **U.S. West** that reside in homes in the bottom income tier (<\$100) were more satisfied with their stay on Maui than more affluent travelers from this visitor market.

SATISFACTION - MAUI

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	85.6%	86.8%	88.3%	89.9%	87.6%	87.5%	89.5%	87.3%	86.3%	88.2%	76.7%
U.S. East	90.5%	91.0%	89.2%	93.4%	90.8%	89.7%	91.1%	89.9%	89.8%	92.7%	80.8%
Japan	72.1%	75.6%	80.7%	74.1%	83.5%		100.0%	66.7%	68.3%	66.7%	100.0%
Canada	85.9%	88.4%	85.7%	87.4%	92.3%		89.2%	85.2%	85.3%	84.7%	79.0%
Oceania	70.1%	80.4%	89.4%	87.5%	81.6%		76.1%	81.1%	57.1%	83.0%	50.0%
Korea	82.0%	85.0%	78.7%	81.5%	80.5%		100.0%	89.7%	93.2%	94.6%	77.7%
China	85.1%	85.3%	74.2%	68.4%	77.0%		100.0%	64.9%	100.0%	89.4%	100.0%
Europe	89.4%	86.0%	81.6%	84.4%	83.8%				86.9%	91.4%	84.4%

P= Preliminary Data

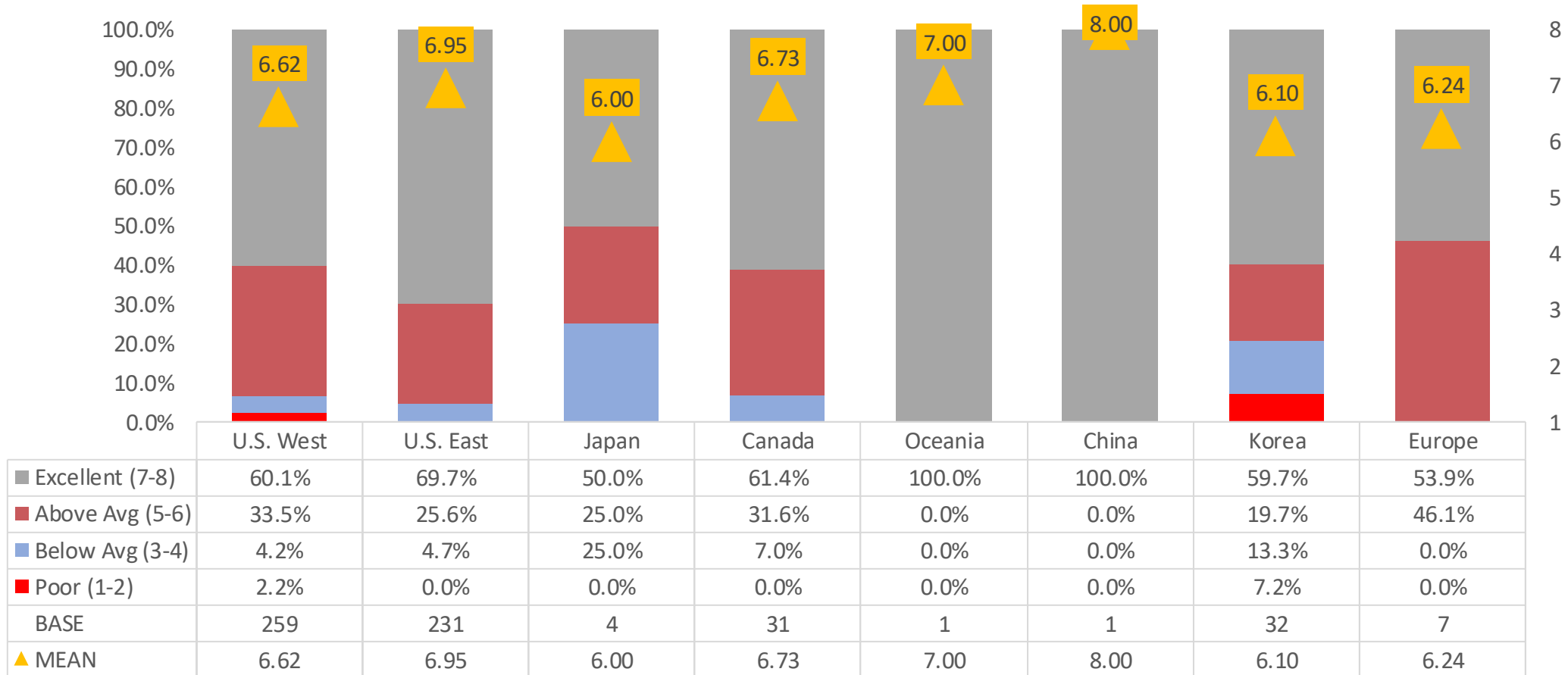
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on Maui?

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.



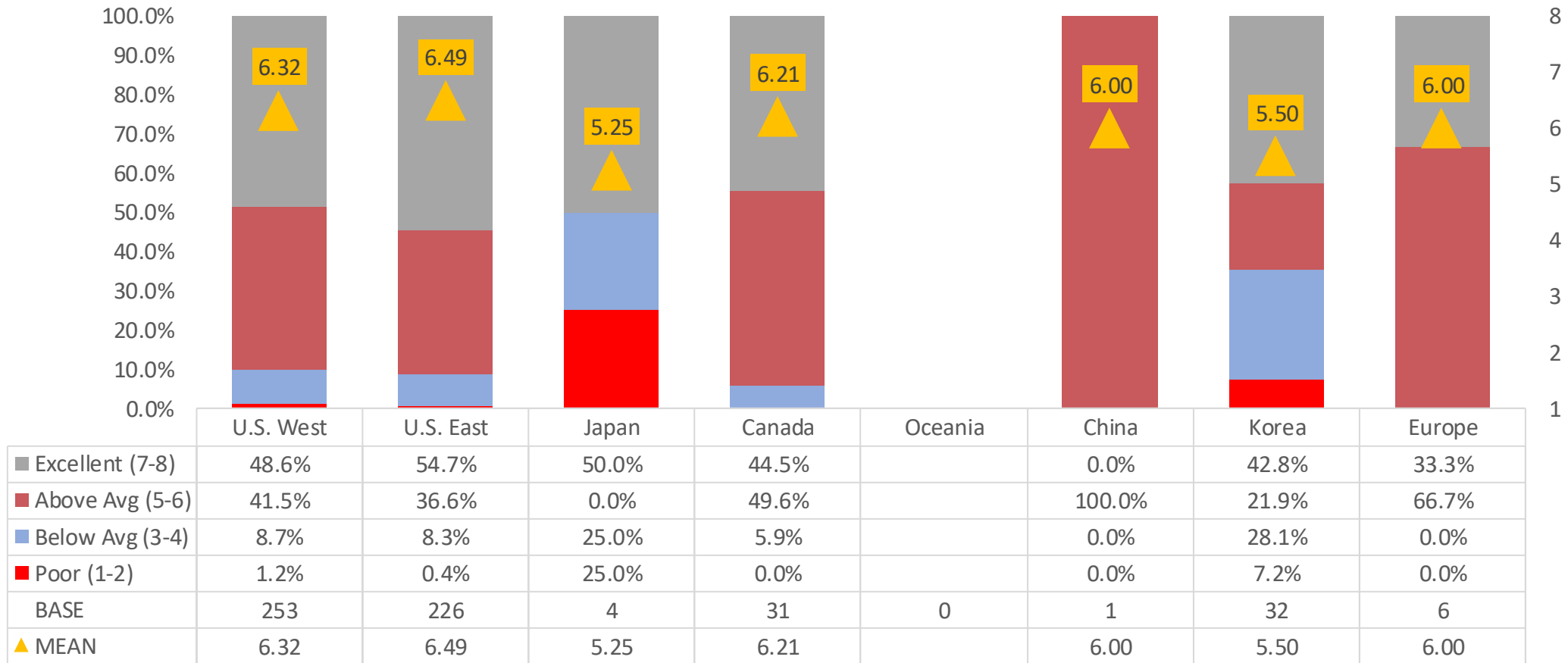
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



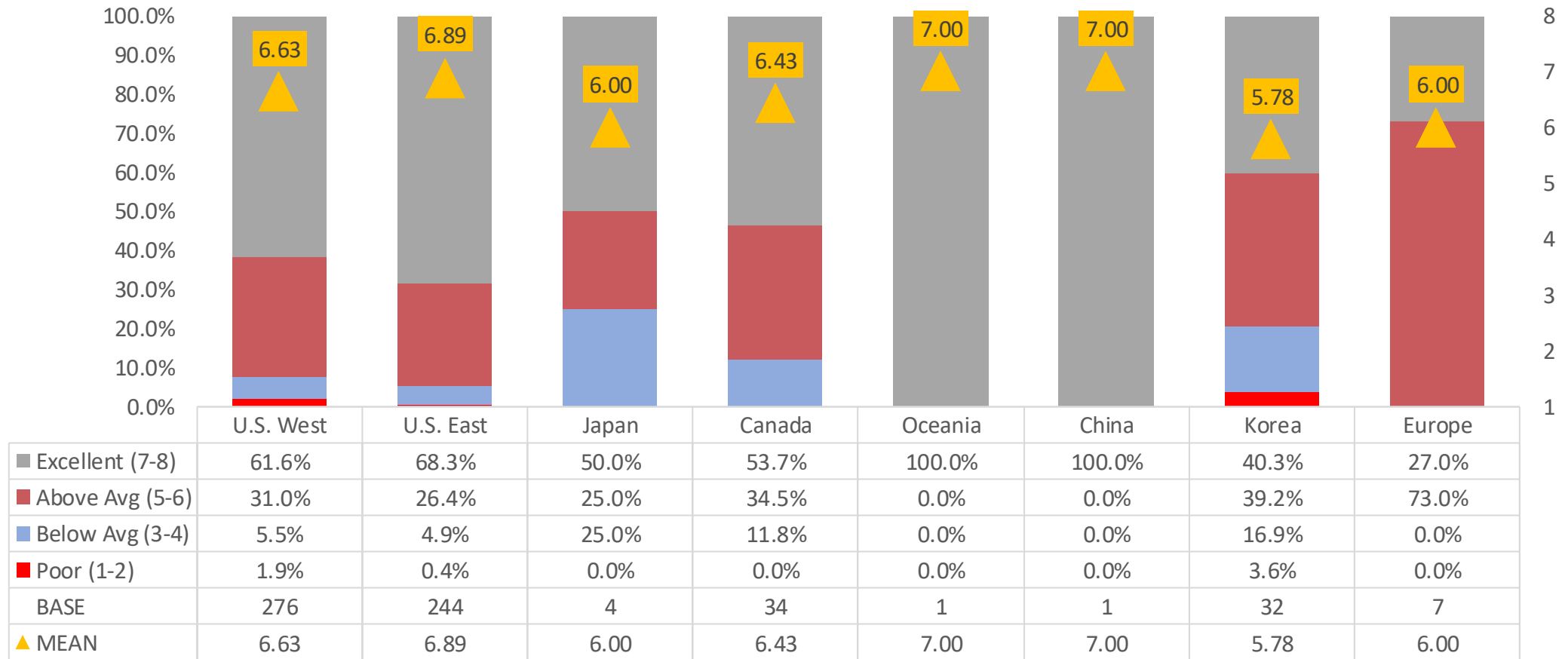
SHOPPING - MAUI

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



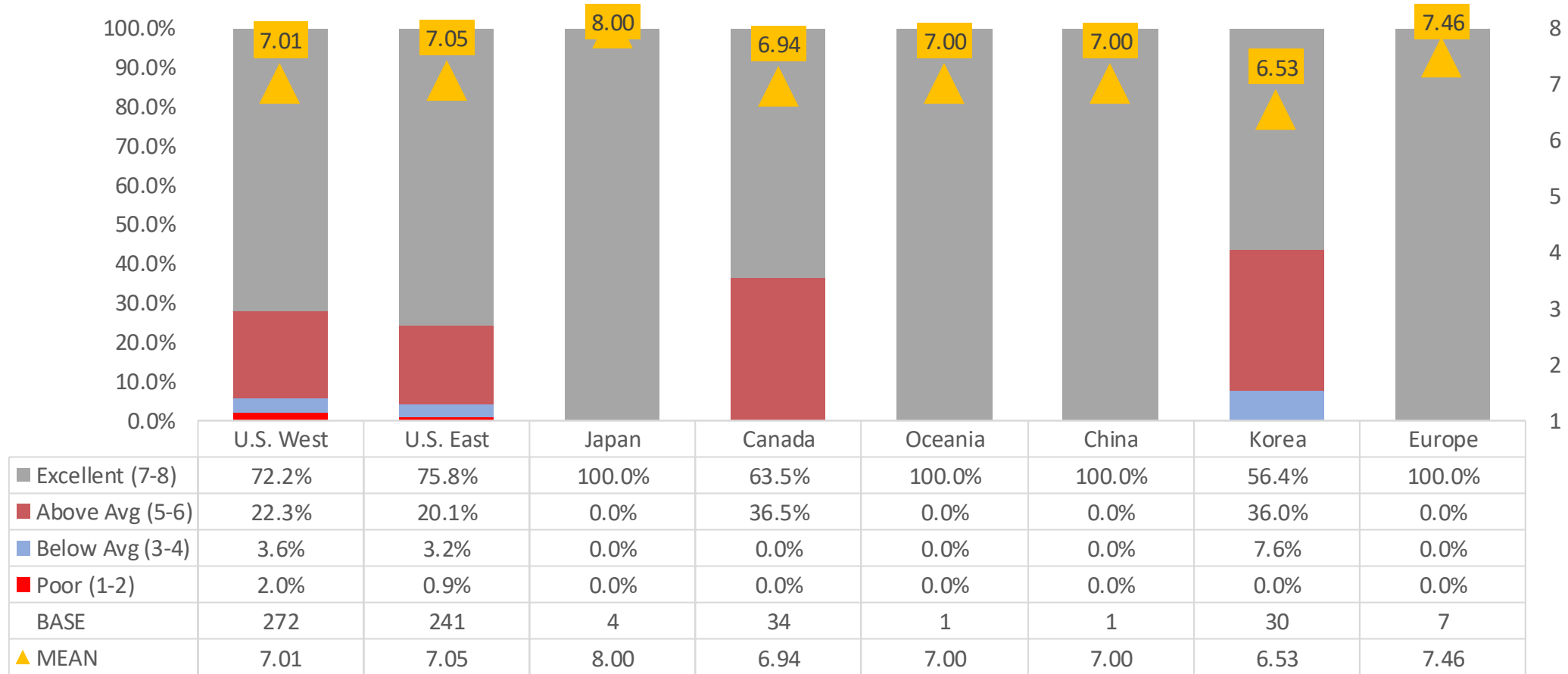
DINING/ FOOD & BEVERAGE - MAUI

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



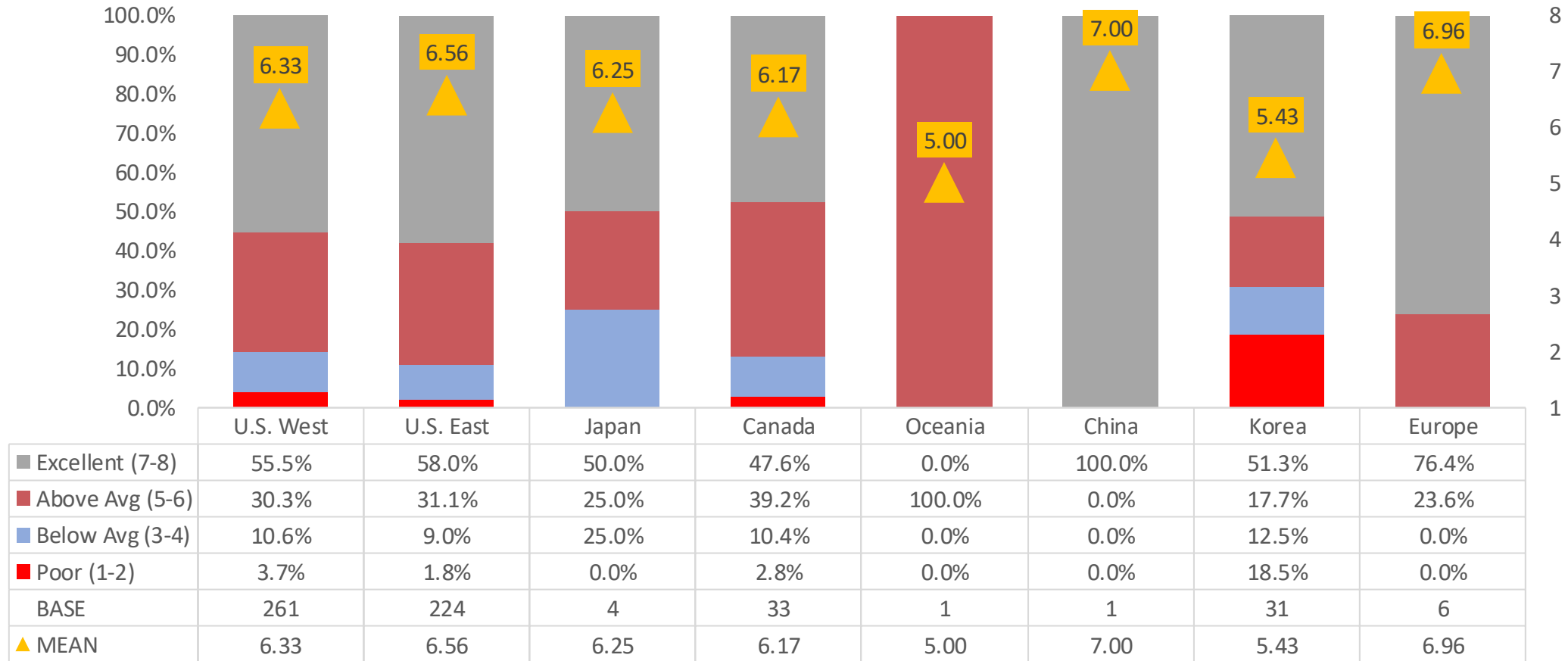
LODGING/ ACCOMMODATIONS - MAUI

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



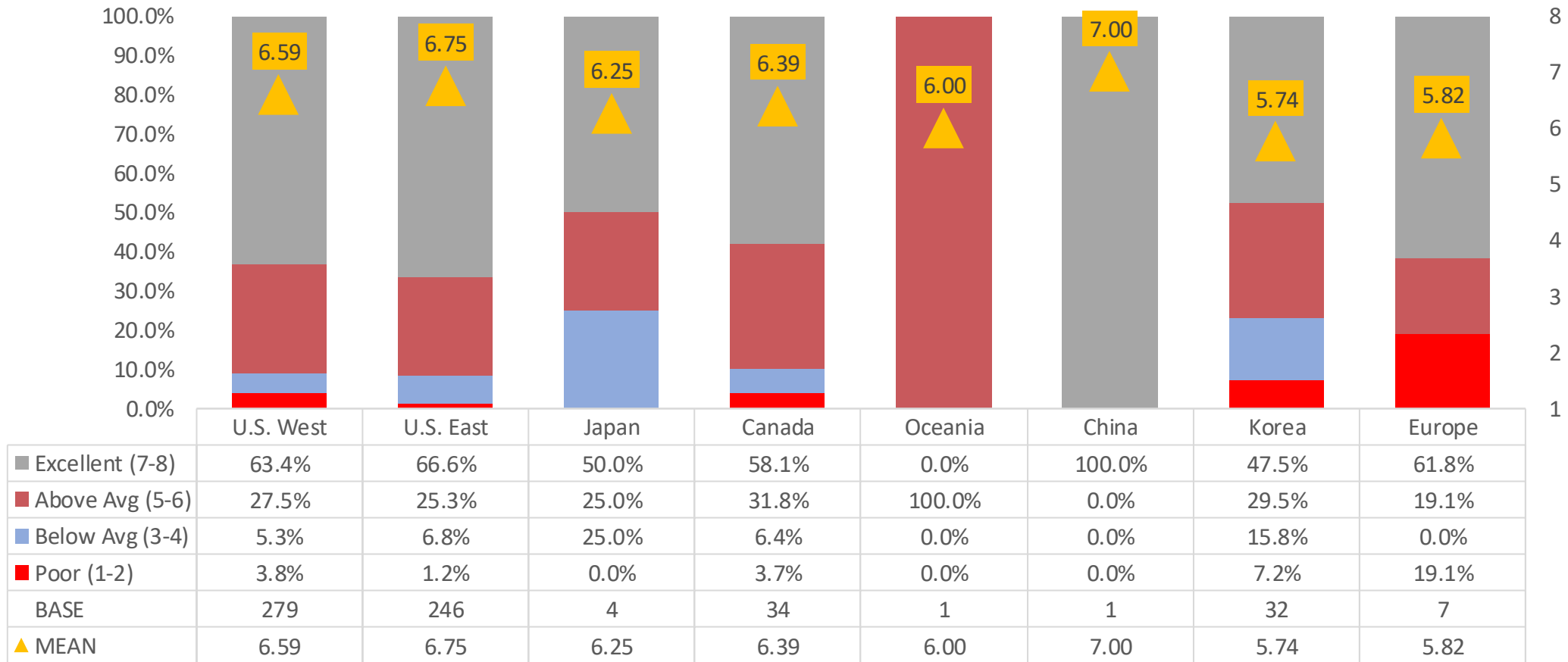
TRANSPORTATION ON ISLAND - MAUI

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



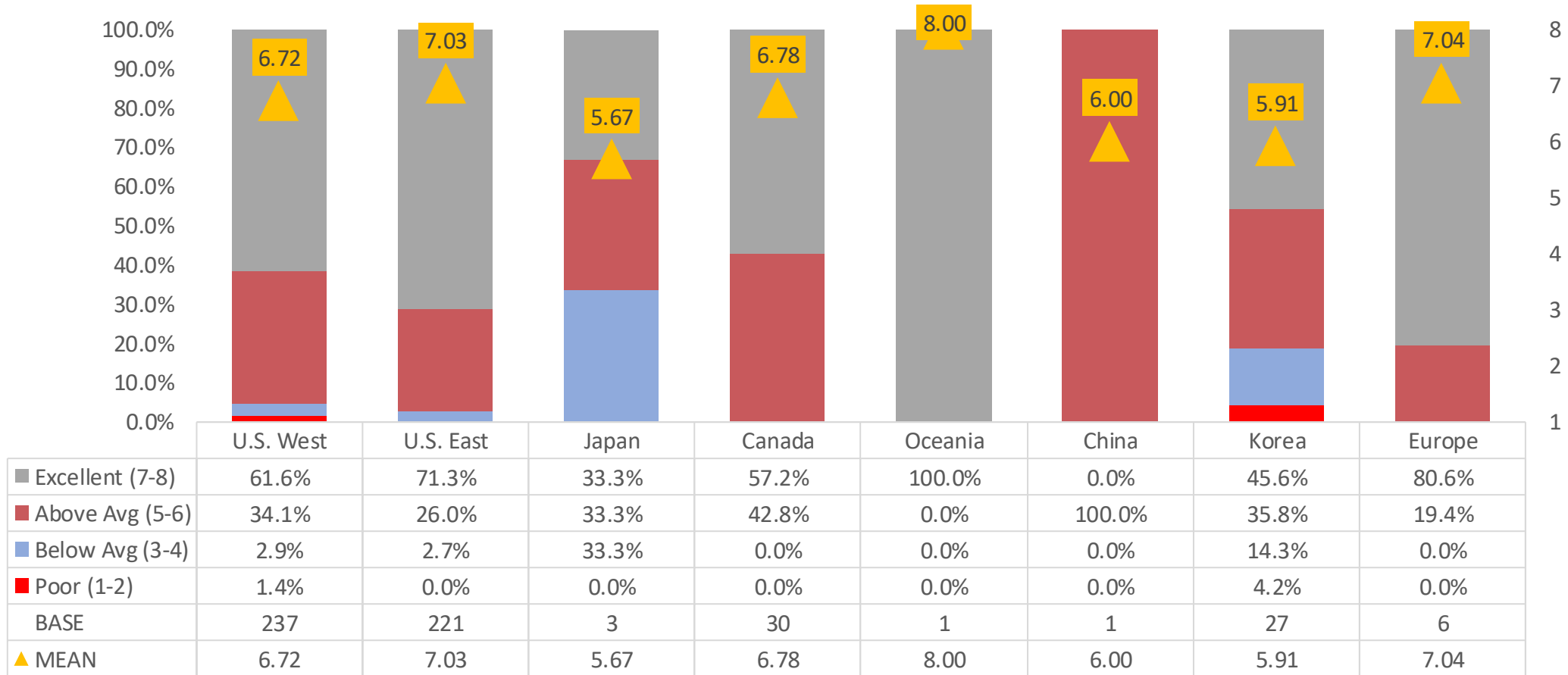
AIRPORT - MAUI

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



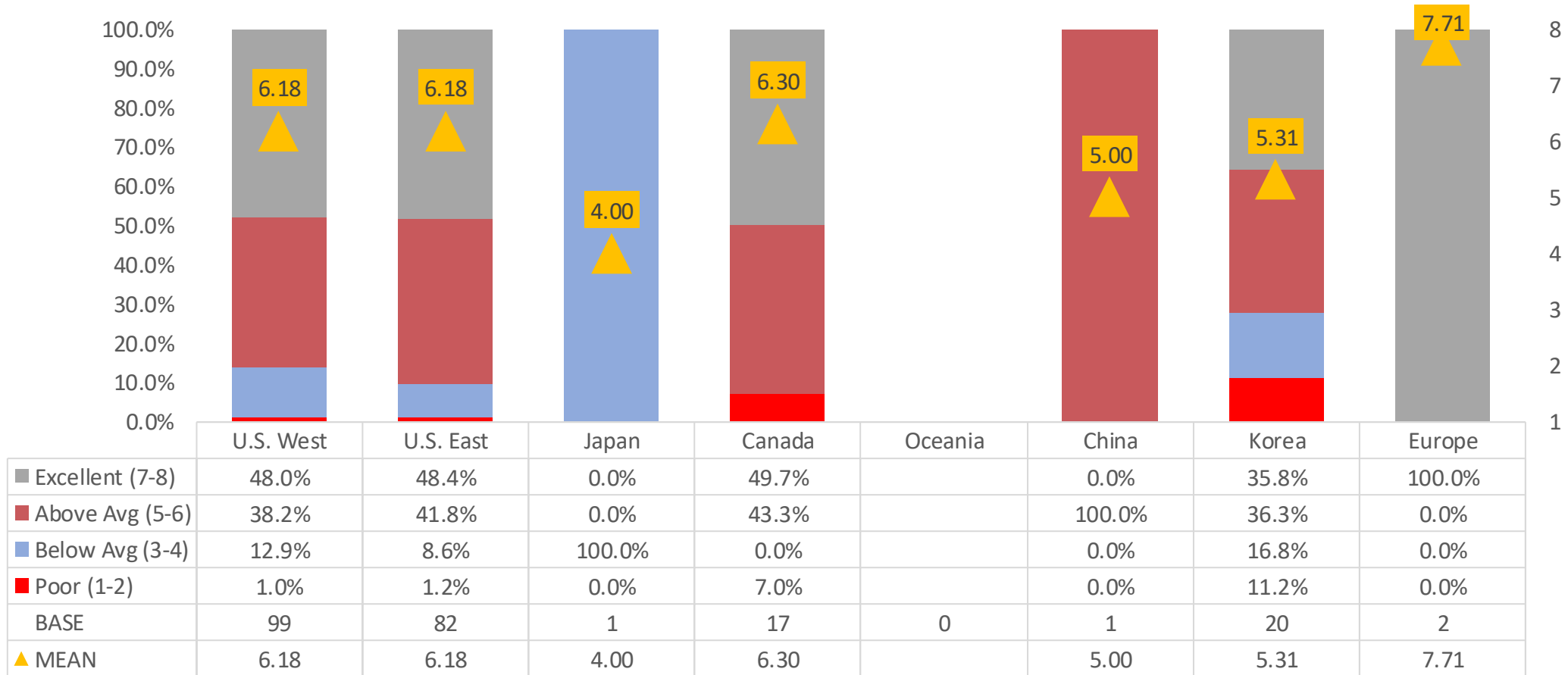
CULTURAL EXPERIENCES - MAUI

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



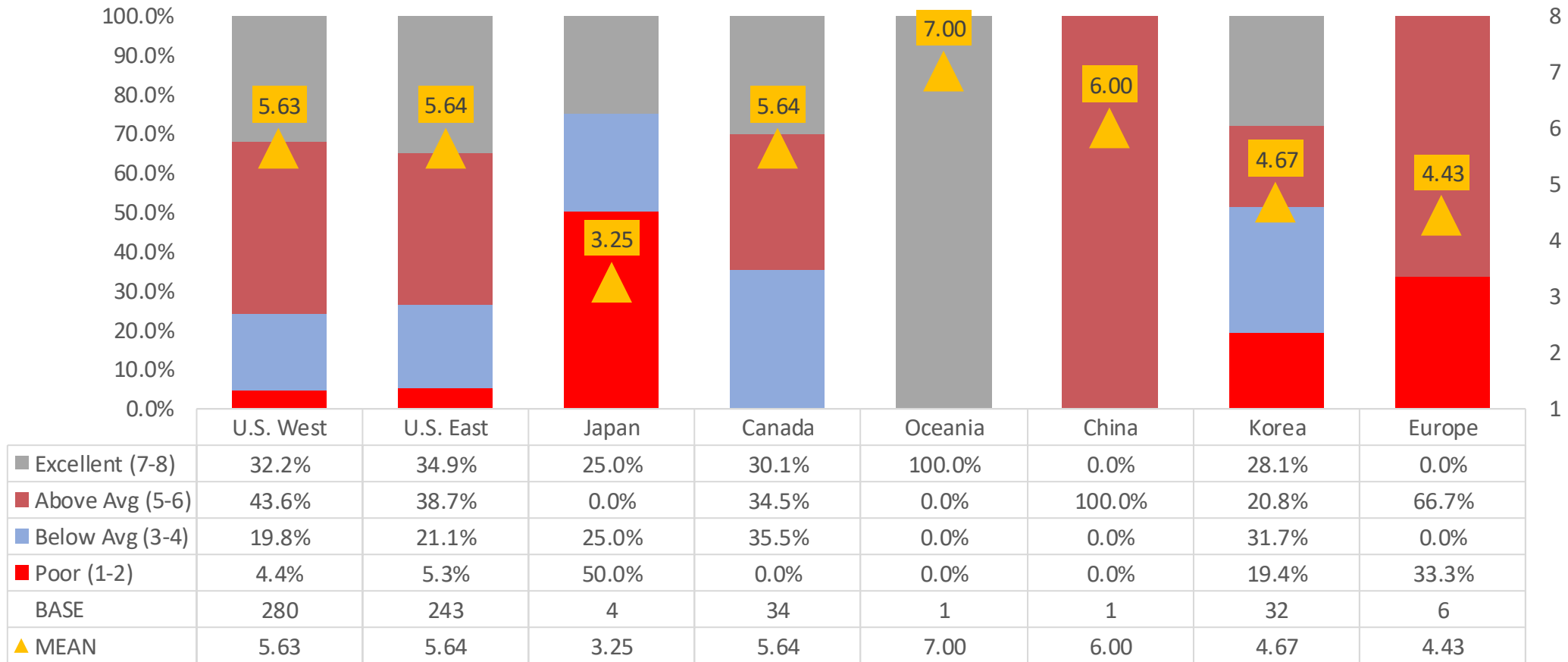
VOLUNTEER EXPERIENCES - MAUI

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



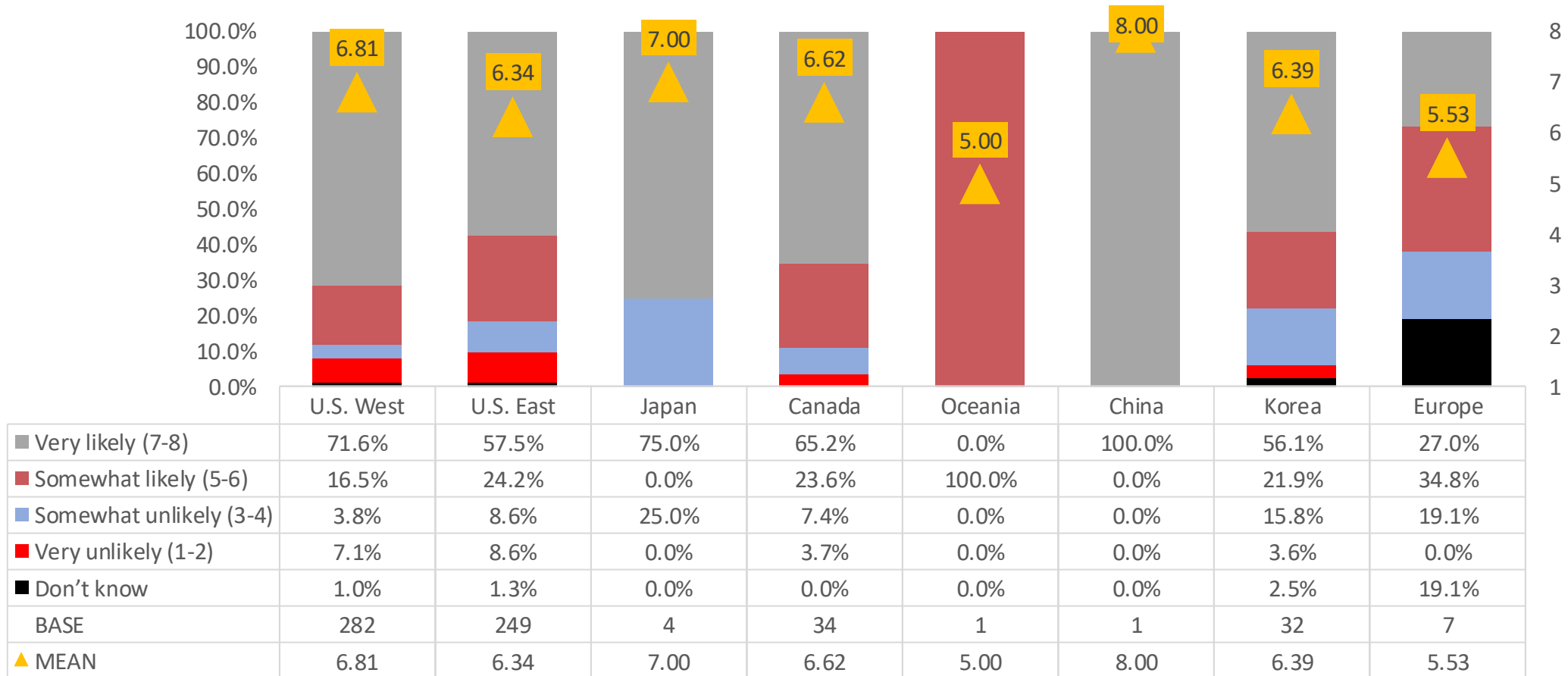
VALUE FOR THE MONEY - MAUI

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



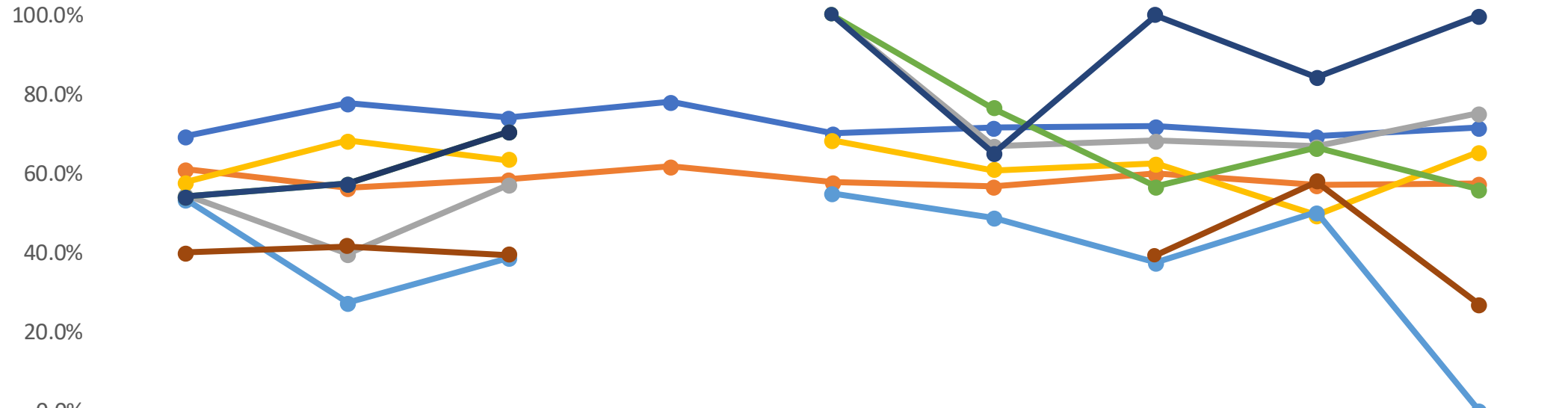
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

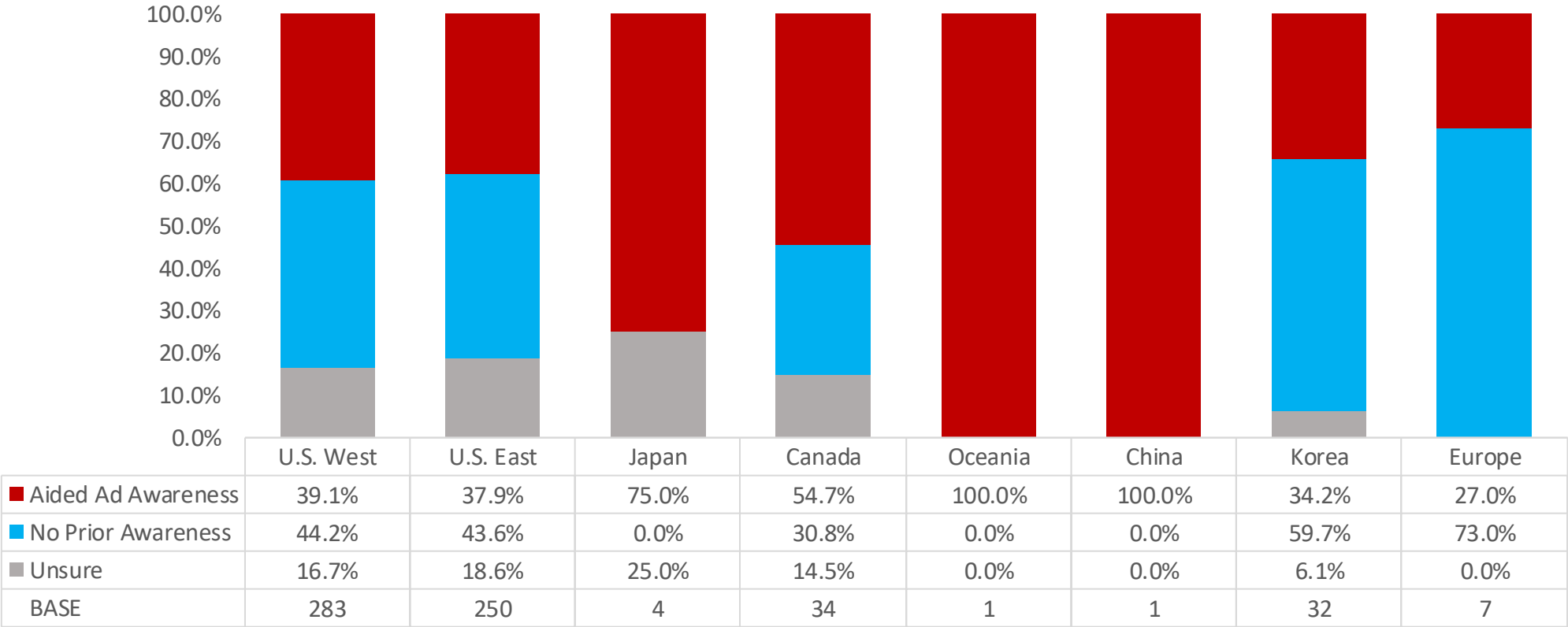


	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	69.5%	77.8%	74.0%	78.2%	70.0%	71.6%	71.9%	69.4%	71.6%
U.S. East	60.9%	56.2%	58.5%	61.8%	57.9%	56.7%	59.9%	57.1%	57.5%
Japan	54.5%	39.8%	57.0%		100.0%	66.7%	68.3%	66.7%	75.0%
Canada	57.8%	68.4%	63.3%		68.2%	60.8%	62.4%	49.4%	65.2%
Oceania	53.5%	27.4%	38.4%		54.7%	48.7%	37.4%	50.0%	0.0%
Korea	54.3%	57.3%	70.3%		100.0%	76.3%	56.7%	66.4%	56.1%
China	54.3%	57.3%	70.3%		100.0%	64.9%	100.0%	84.2%	100.0%
Europe	40.0%	41.5%	39.4%				39.1%	57.8%	27.0%

P= Preliminary Data

Q. How likely are you to visit Maui again in the next five years?

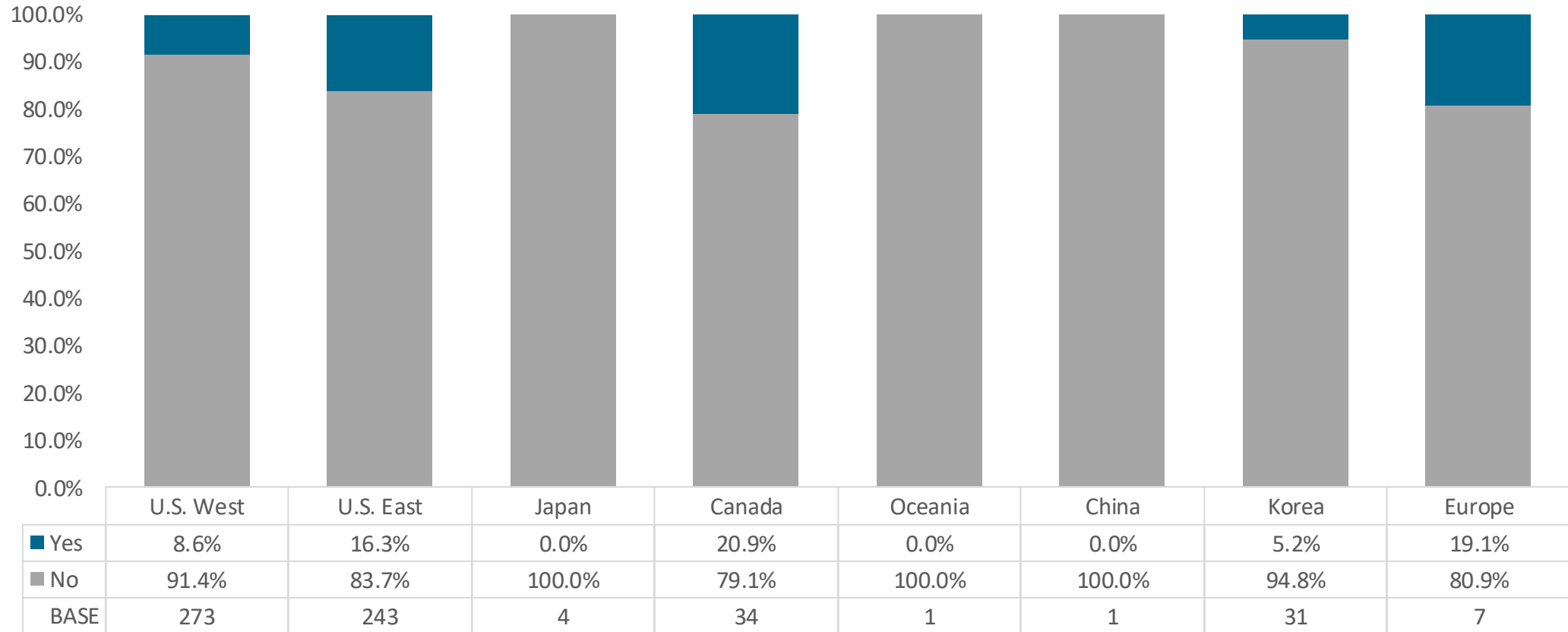
AIDED ADVERTISING AWARENESS - MAUI



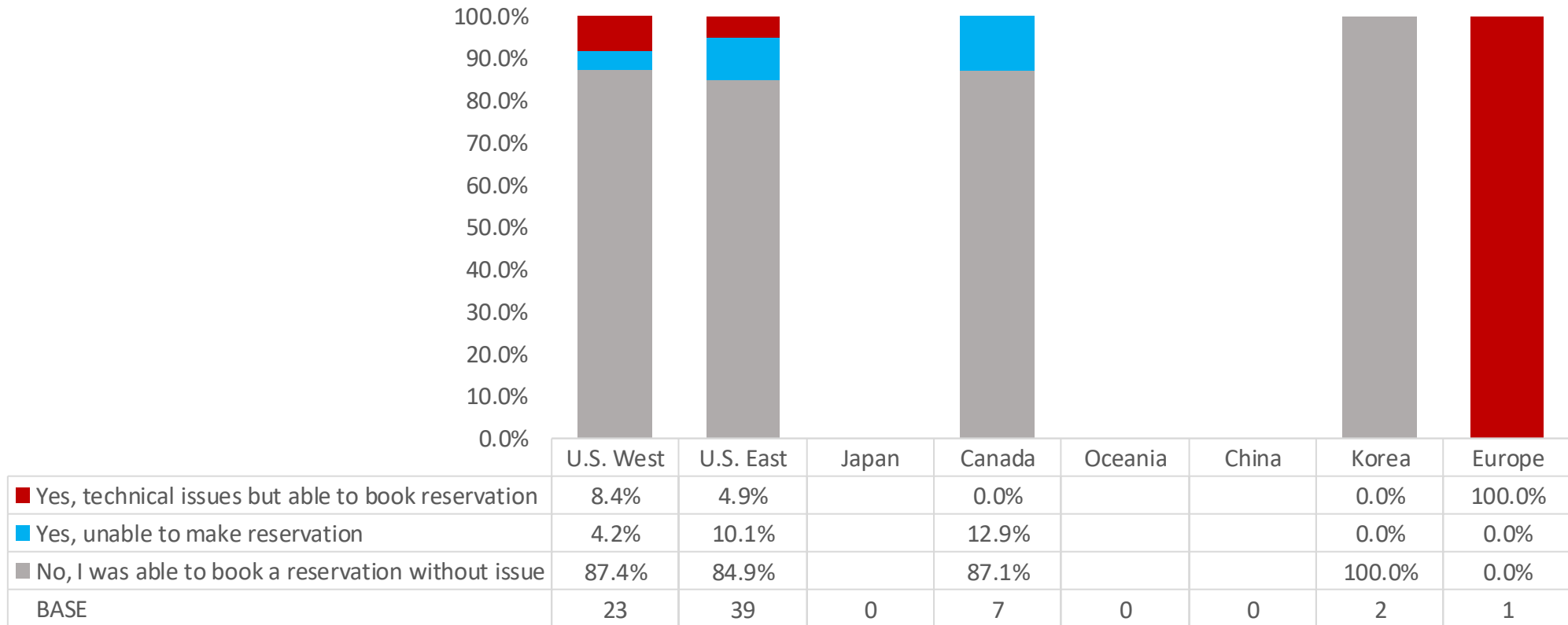
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai'i	6.9%	11.3%	25.0%	10.8%	0.0%	0.0%	6.1%	19.1%
Hawaiian music	16.0%	12.6%	25.0%	22.7%	0.0%	0.0%	0.0%	7.9%
Social media posts and videos	16.3%	17.6%	75.0%	19.9%	0.0%	100.0%	18.0%	7.9%
Outdoor or sporting activities and events	18.3%	13.9%	50.0%	20.9%	100.0%	0.0%	7.5%	0.0%
Hawaiian cultural experiences and Hawaiian cultural events	19.0%	29.6%	25.0%	29.1%	100.0%	0.0%	3.6%	27.0%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	45.0%	56.5%	25.0%	39.9%	100.0%	0.0%	37.8%	53.9%
Attend a festival or other event	3.5%	4.0%	0.0%	6.4%	0.0%	0.0%	6.1%	0.0%
BASE	283	250	4	34	1	1	32	7

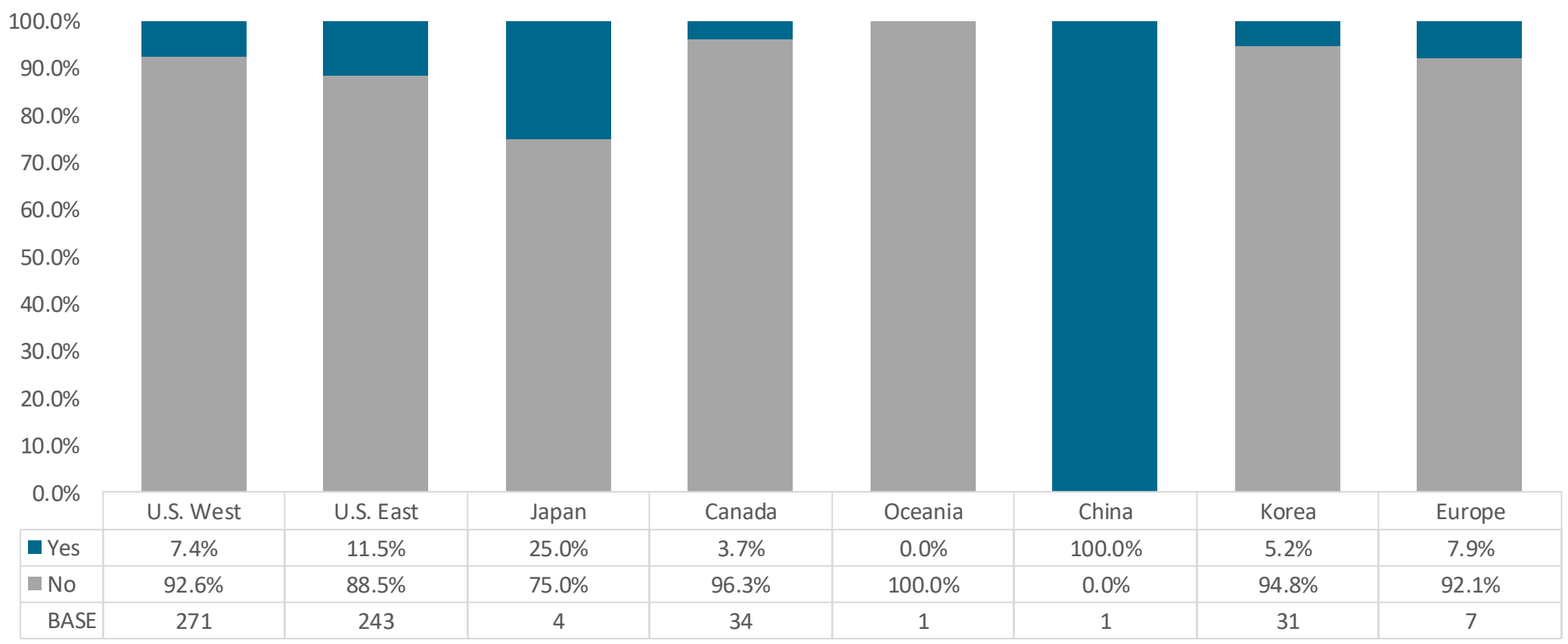
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



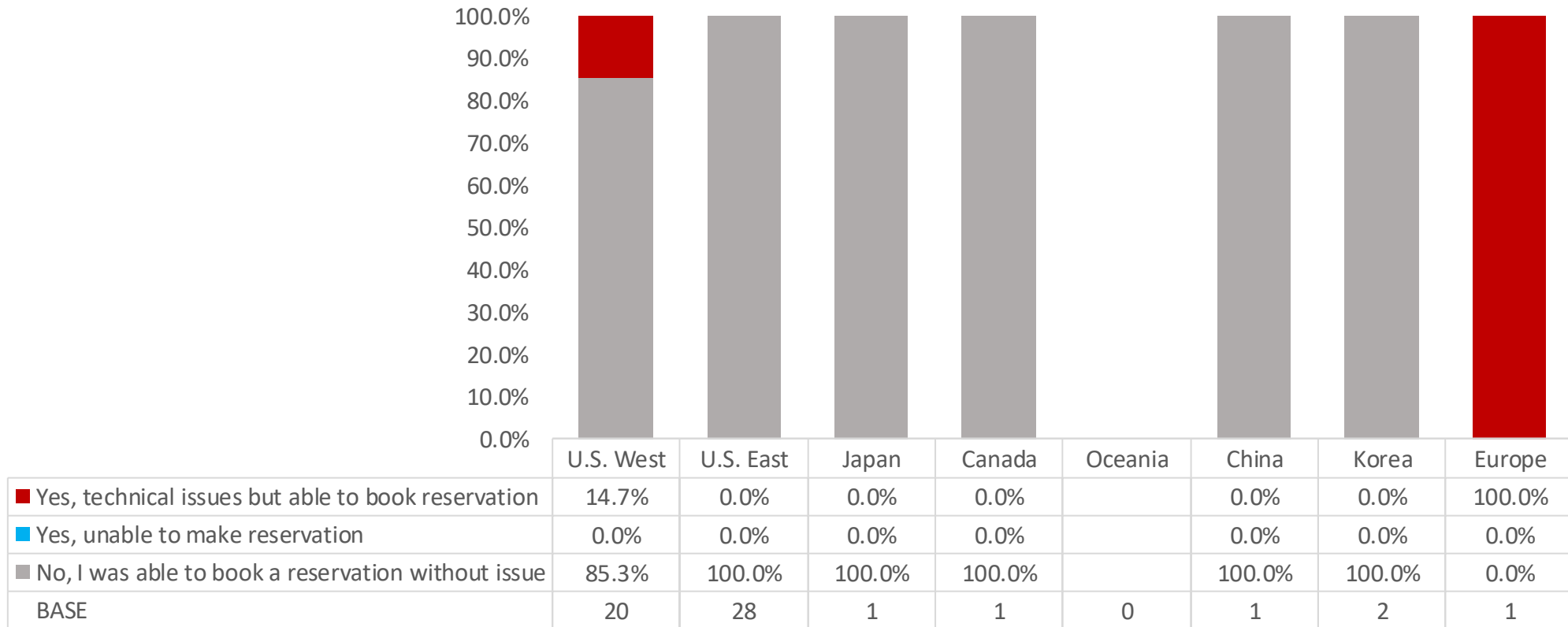
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



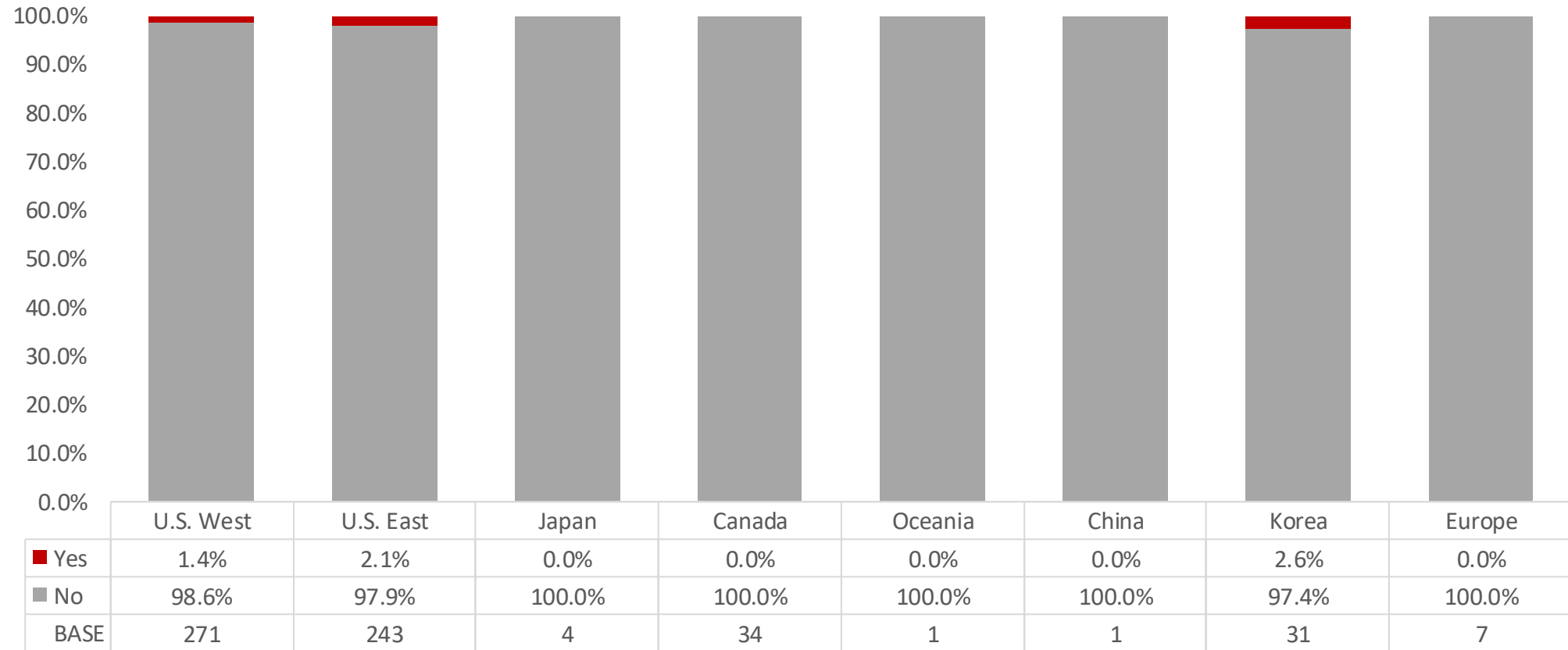
‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



‘ĪAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



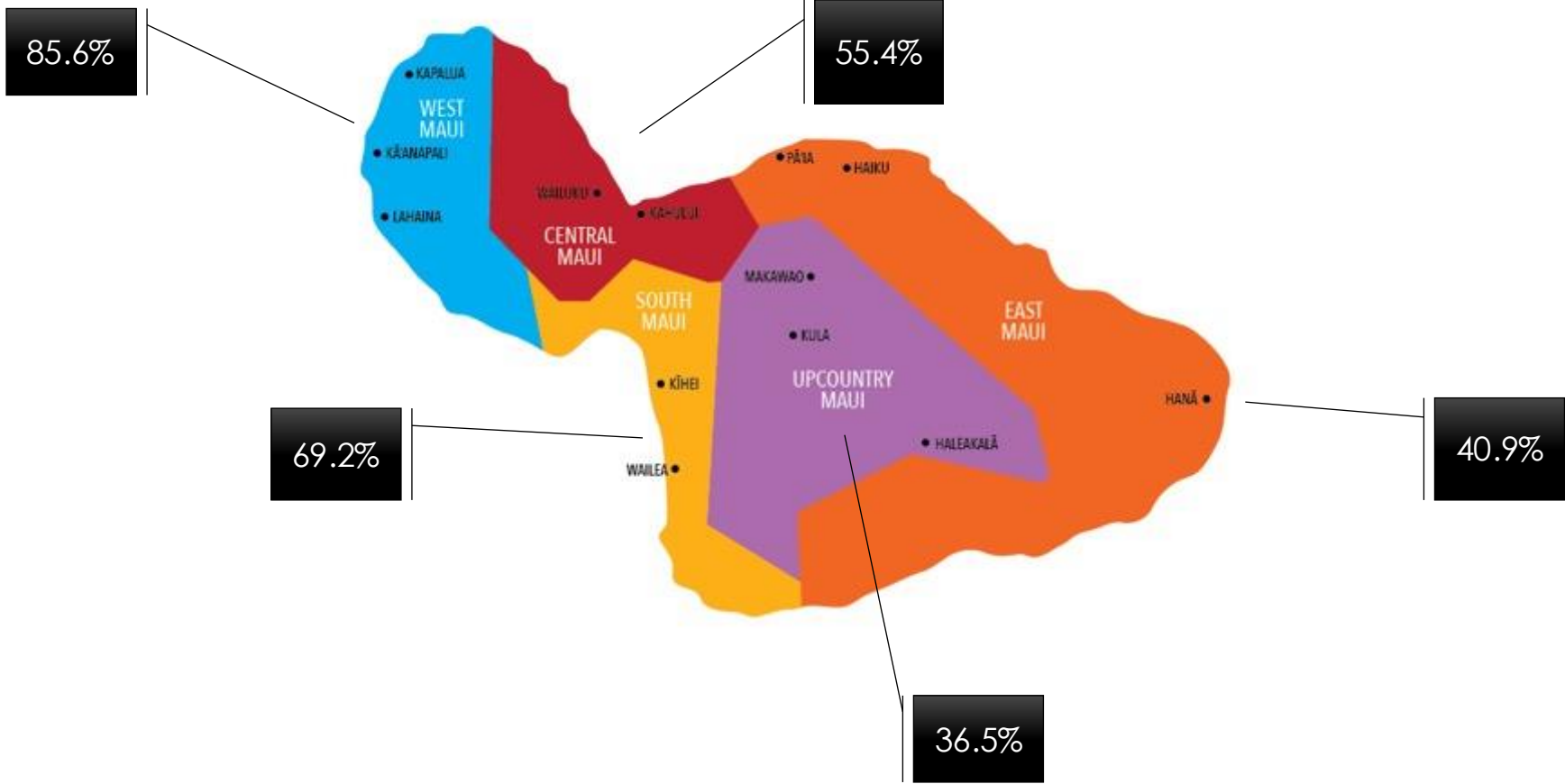
VISITED MAUI FOR SPECIFIC EVENT



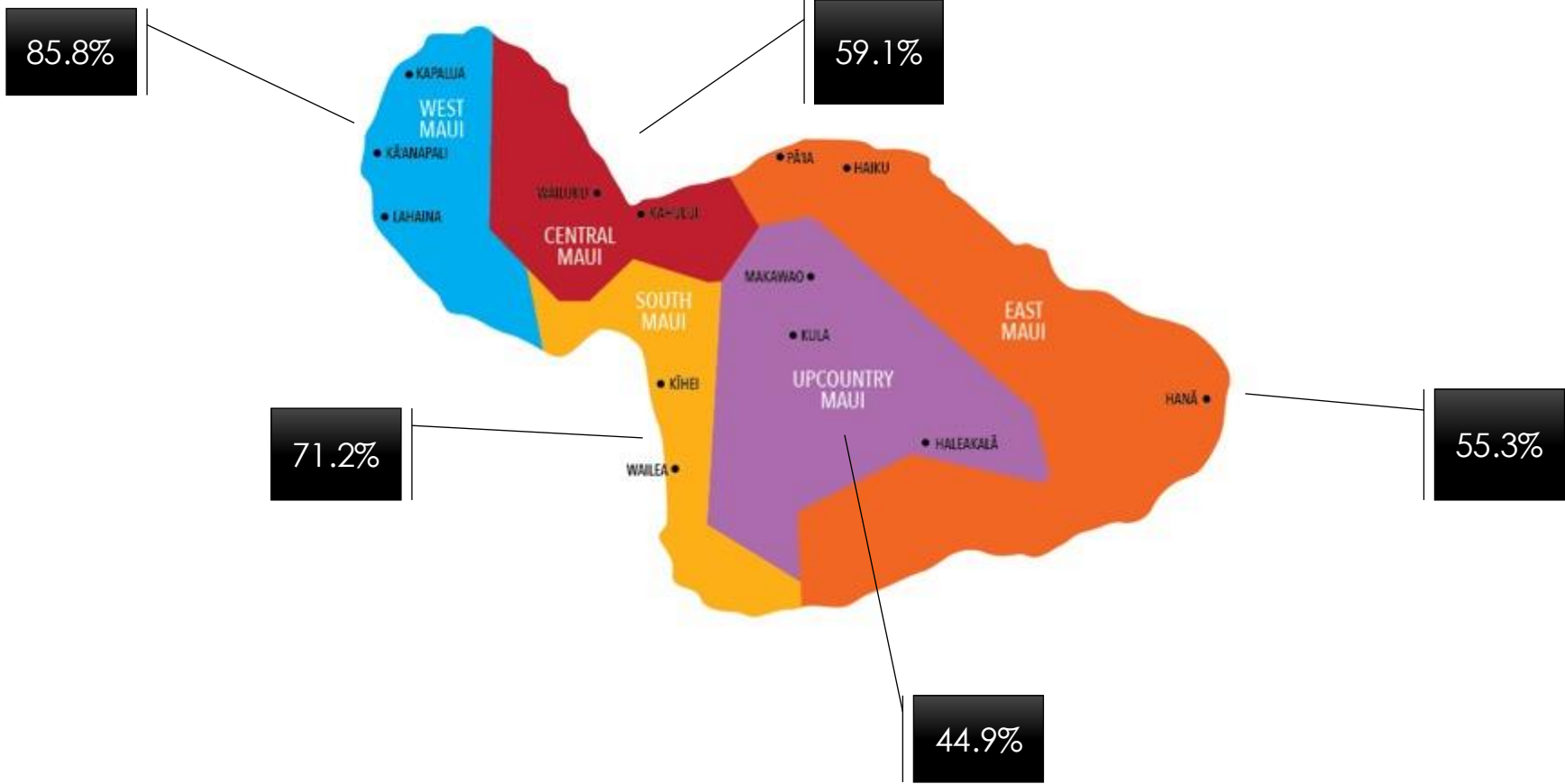
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Sentry Tournament of Golf Champions	25.0%	19.6%				0.0%		
Maui Marathon	0.0%	19.6%				0.0%		
Other	75.0%	60.8%				100%		
BASE	4	5	0	0	0	1	0	0

AREAS VISITED - MAUI U.S. WEST



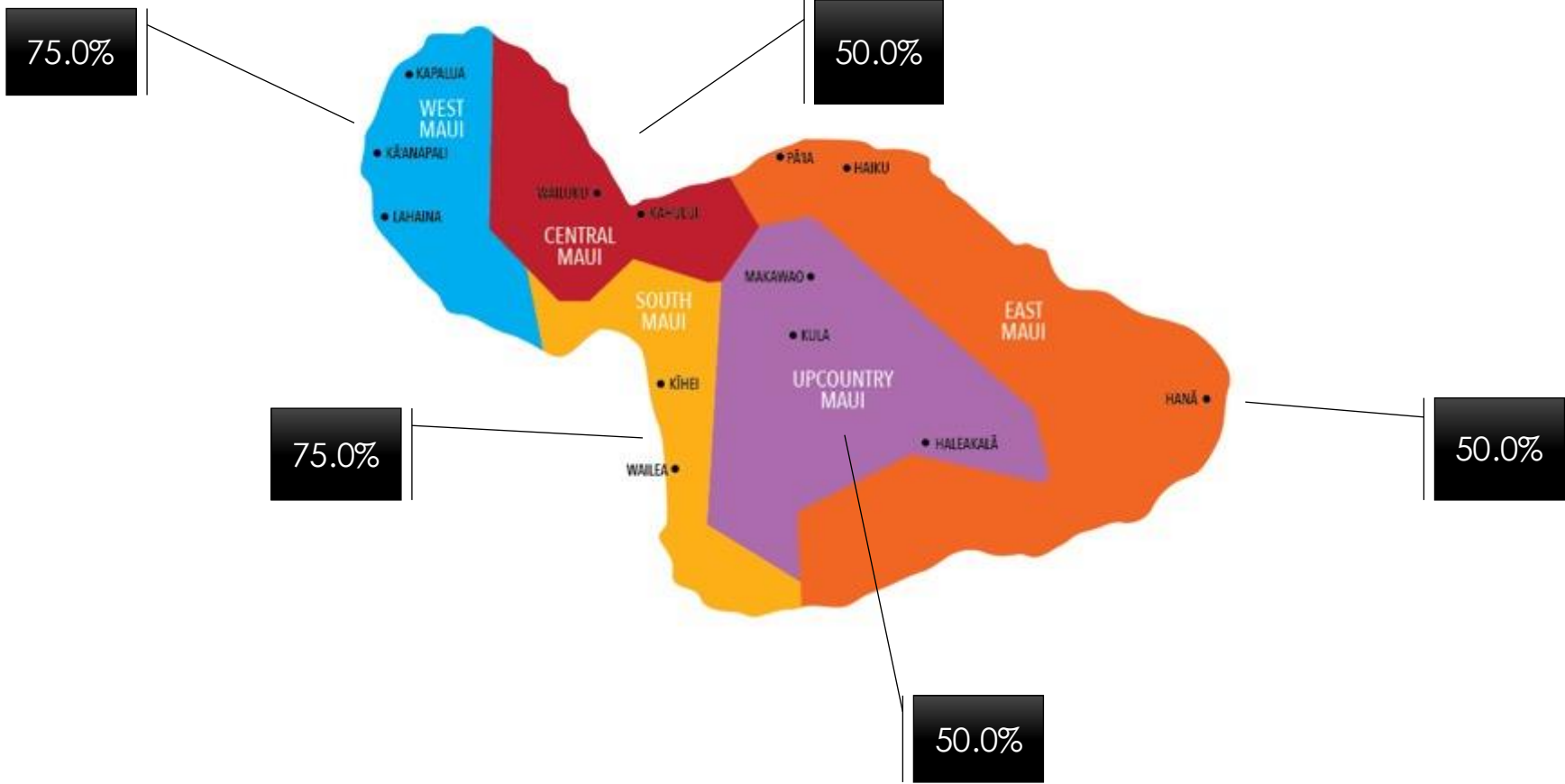
AREAS VISITED - MAUI U.S. EAST



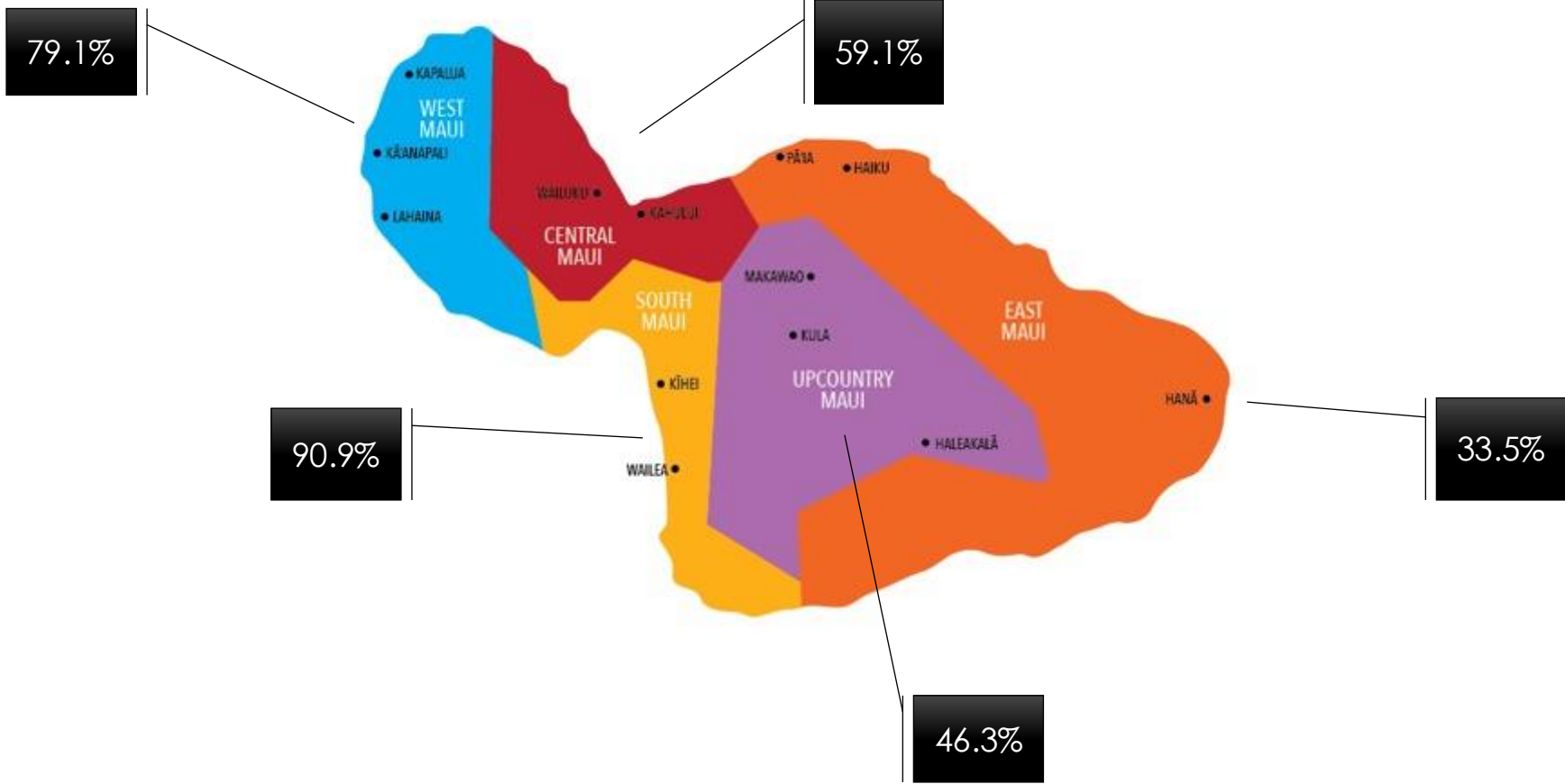
145 Q. Which of the following areas did you visit during your stay on Maui?



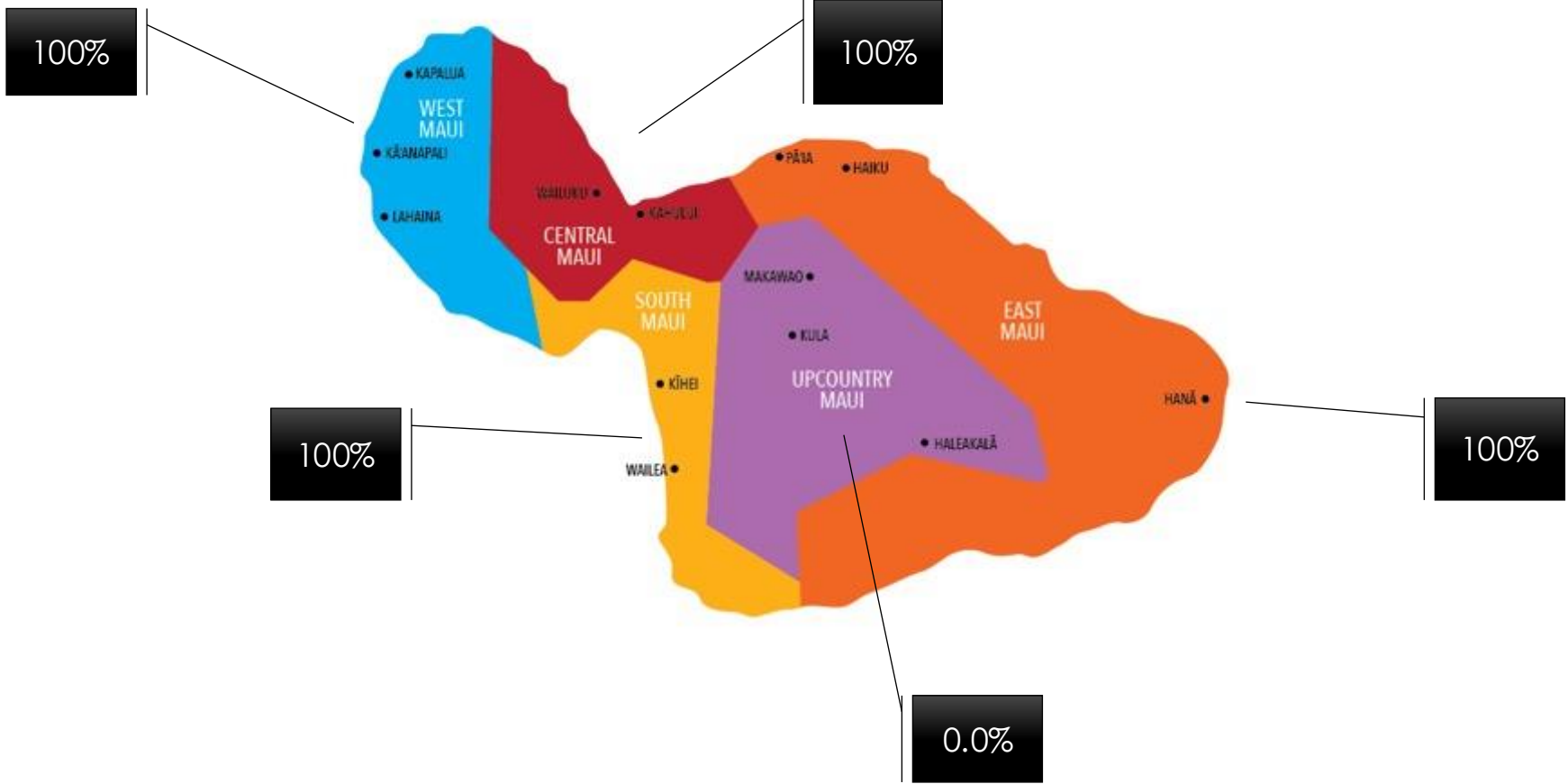
AREAS VISITED - MAUI JAPAN



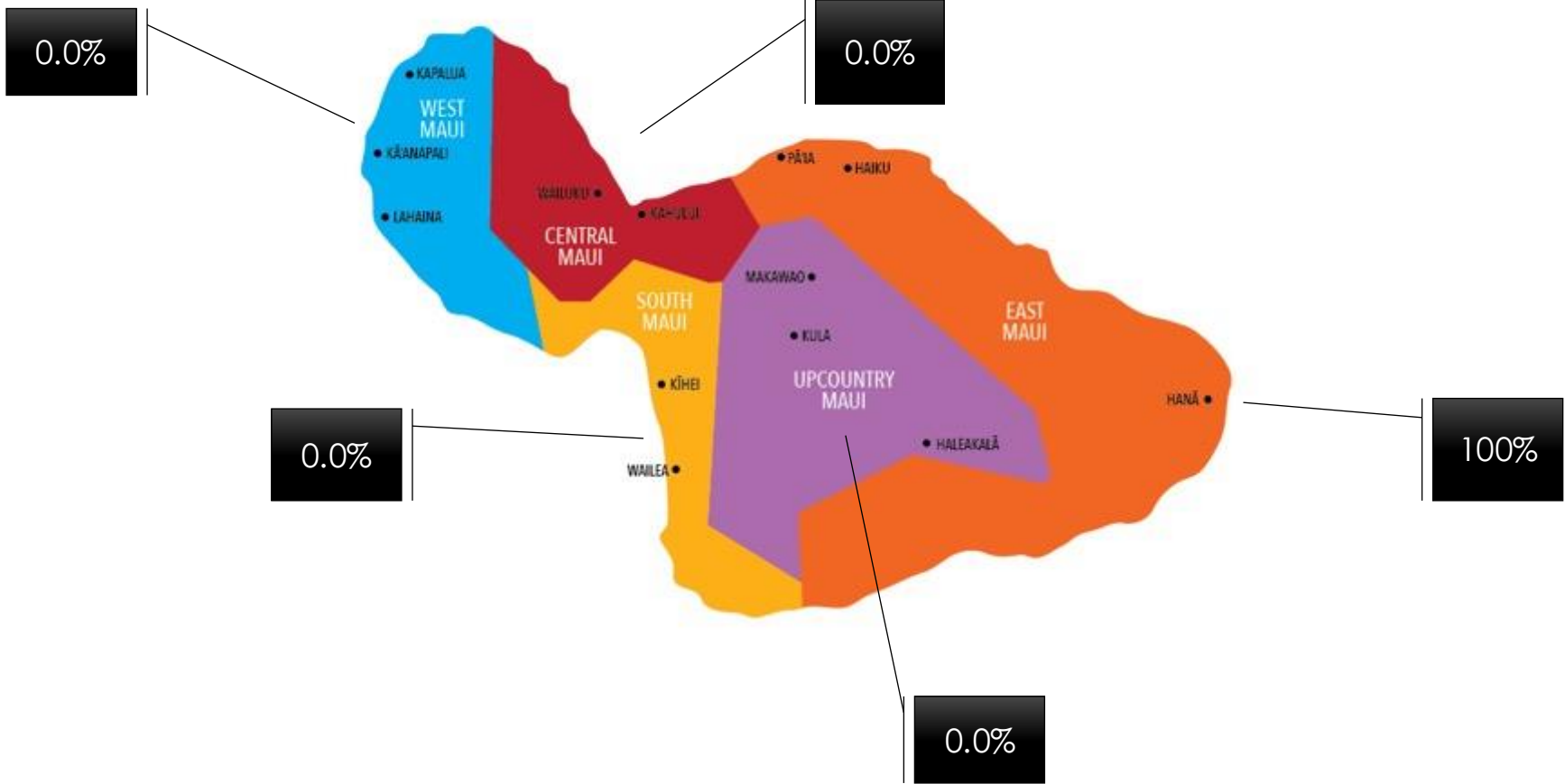
AREAS VISITED - MAUI CANADA



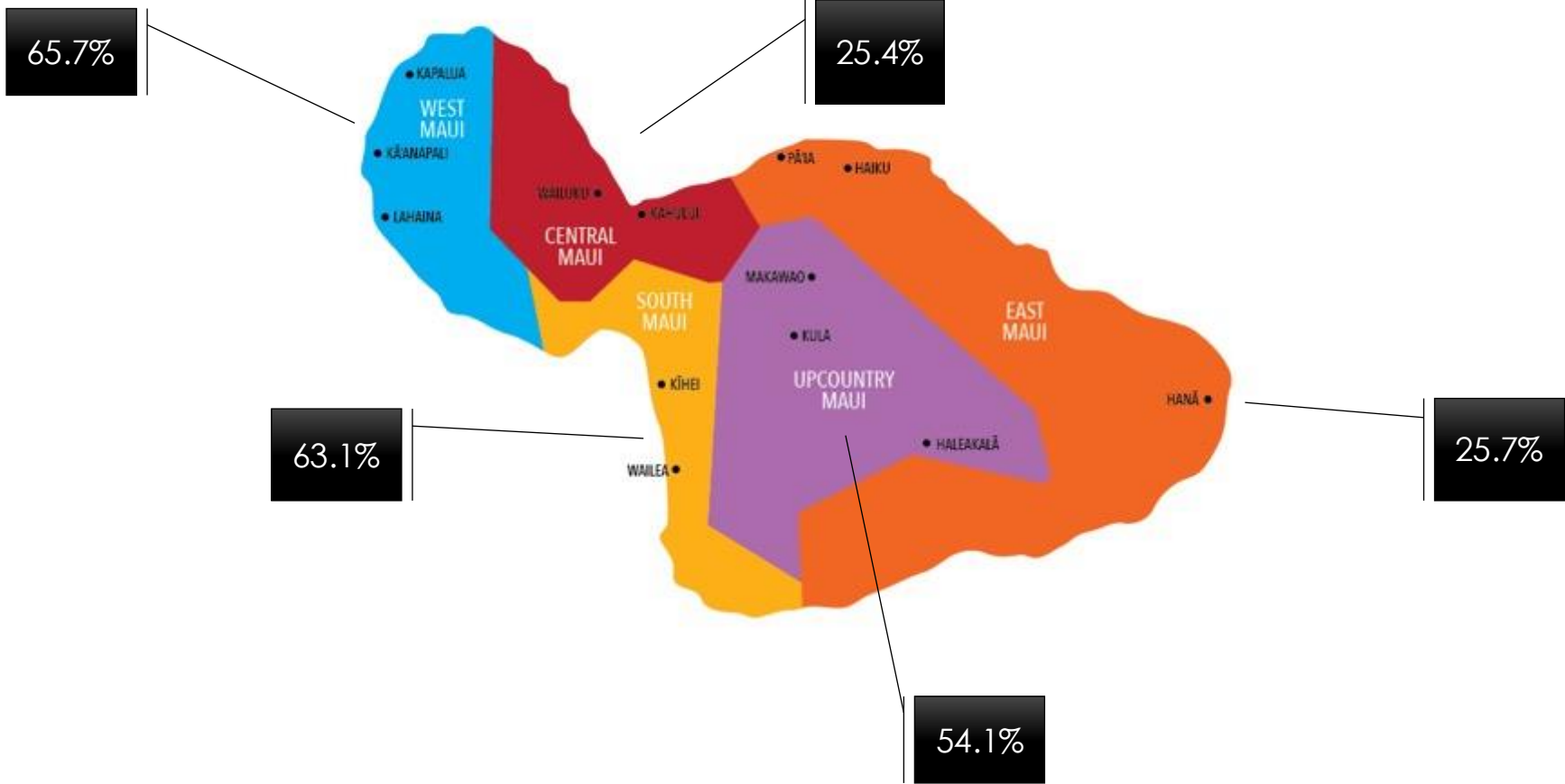
AREAS VISITED - MAUI OCEANIA



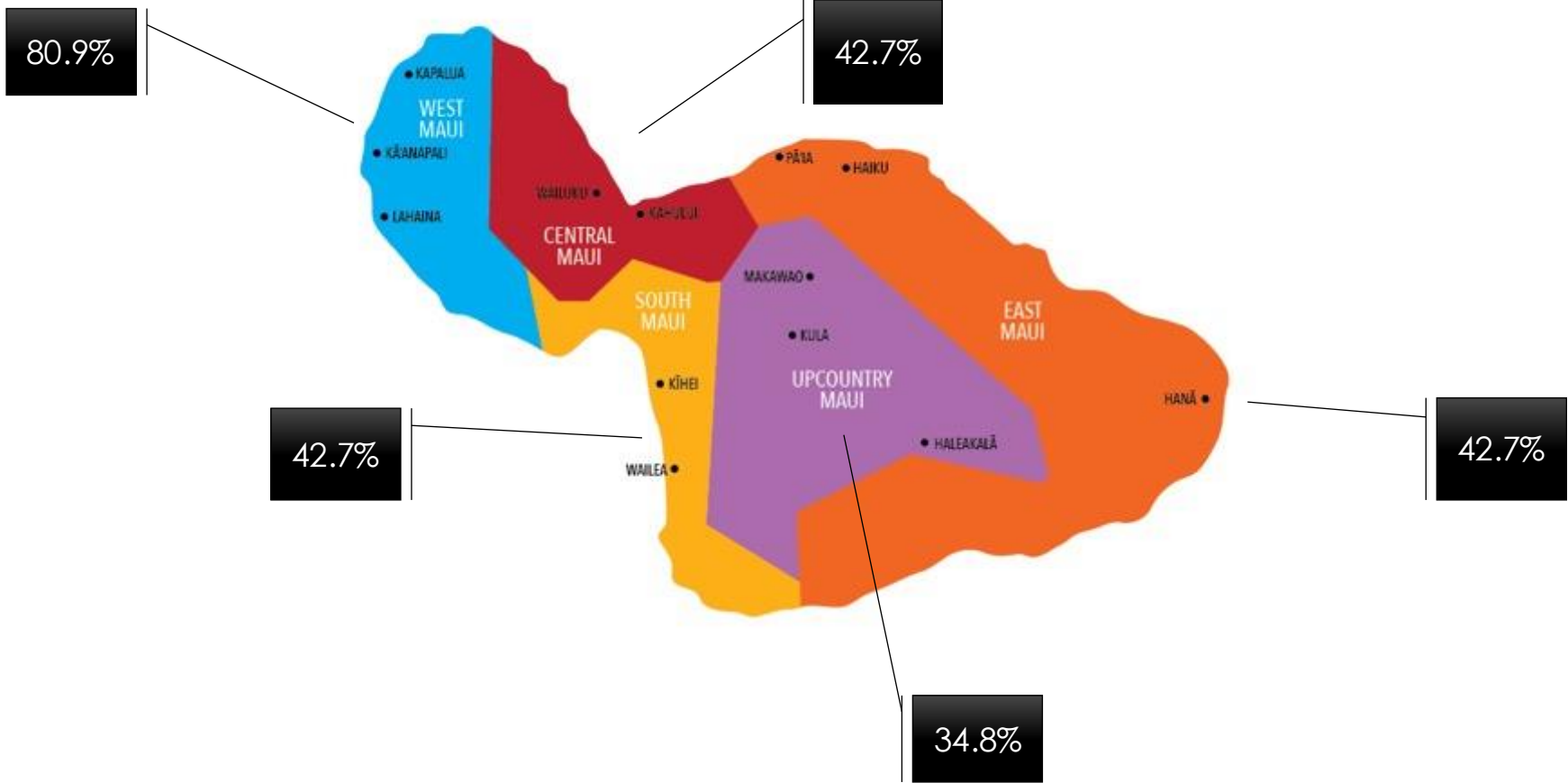
AREAS VISITED - MAUI CHINA



AREAS VISITED - MAUI KOREA



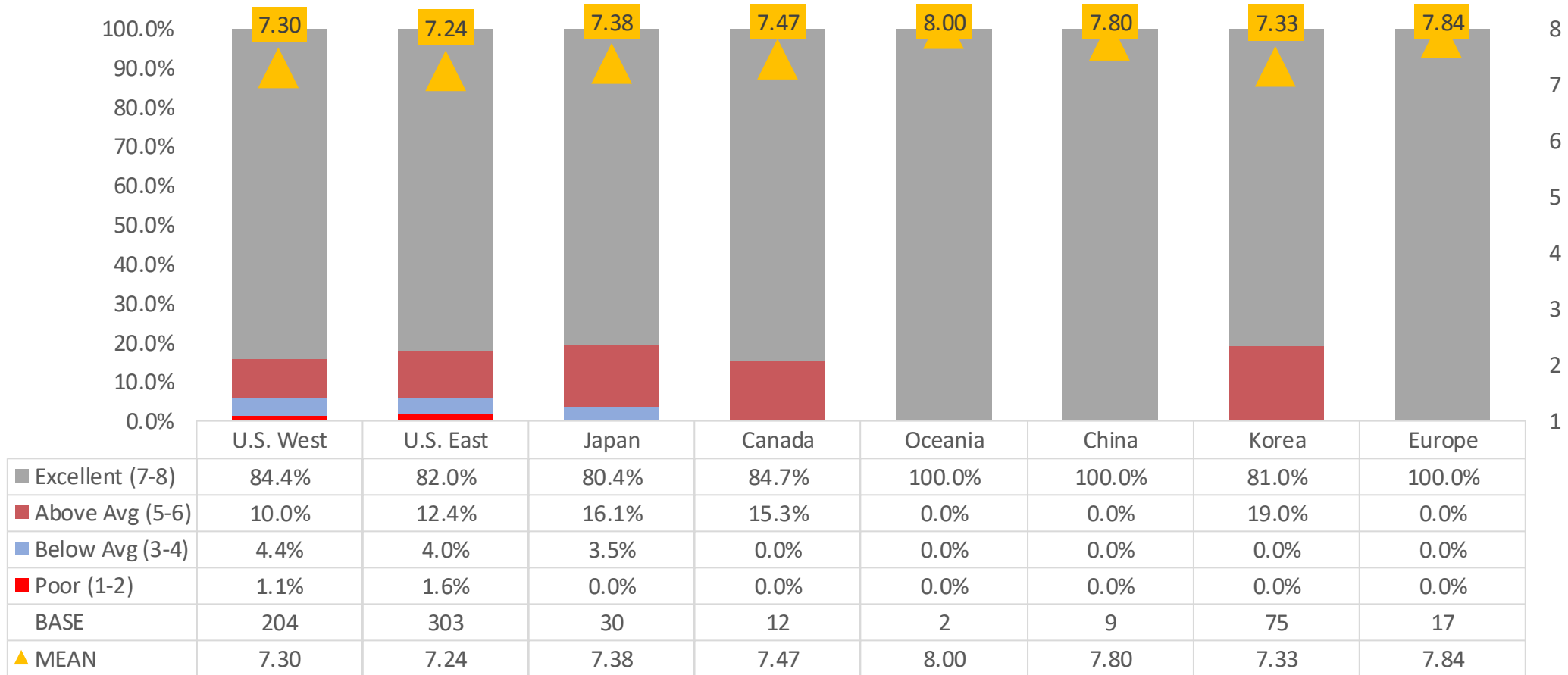
AREAS VISITED - MAUI EUROPE



Section 10 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

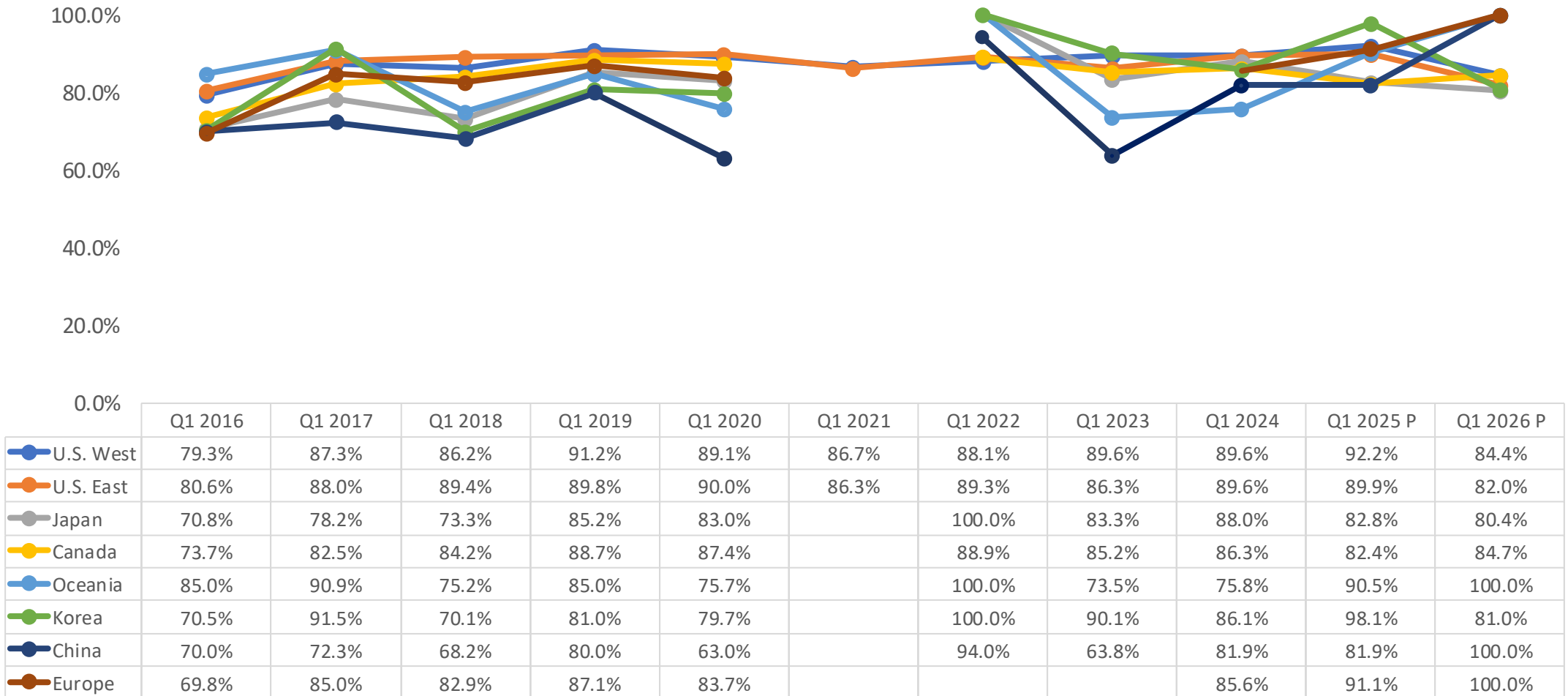
8-pt Rating Scale
8 = Excellent / 1 = Poor



SATISFACTION - ISLAND OF HAWAI‘I

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

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



P= Preliminary Data

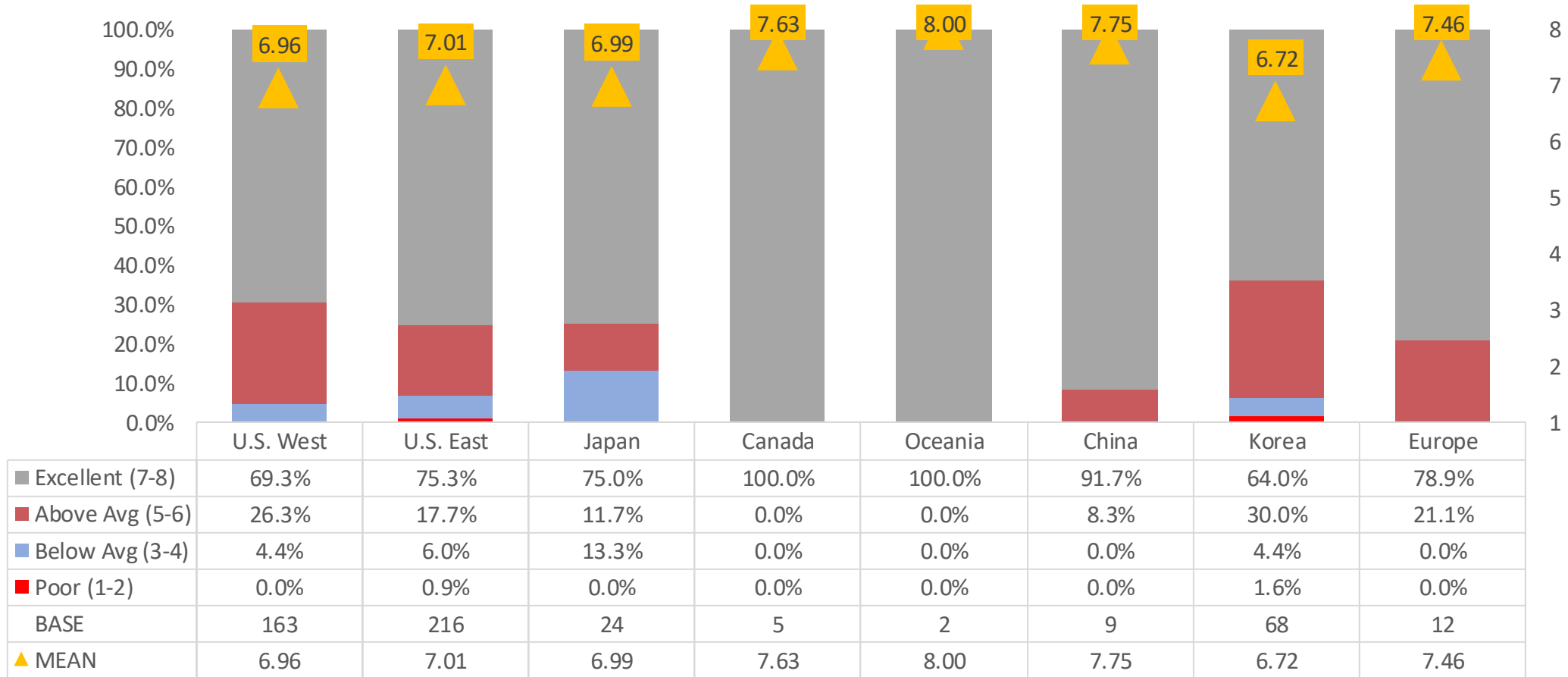
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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.



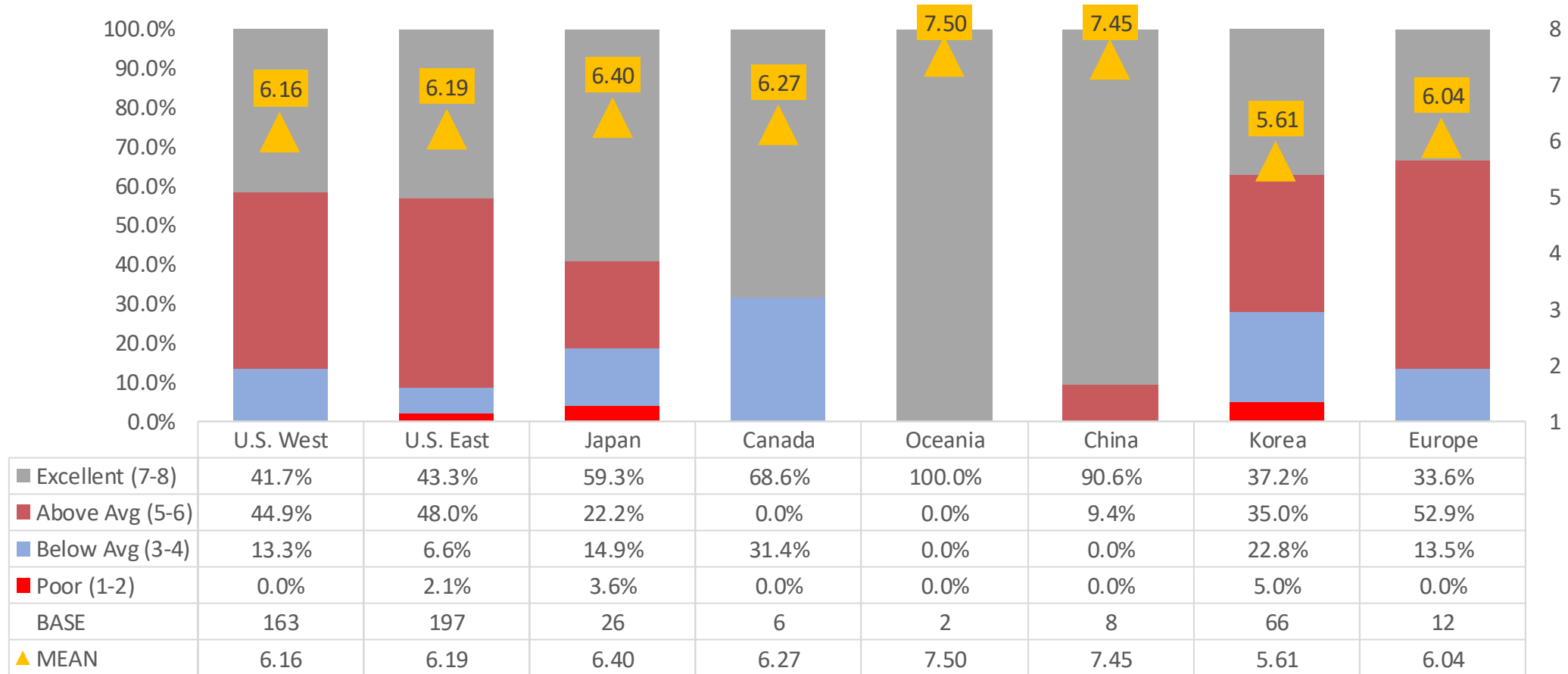
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



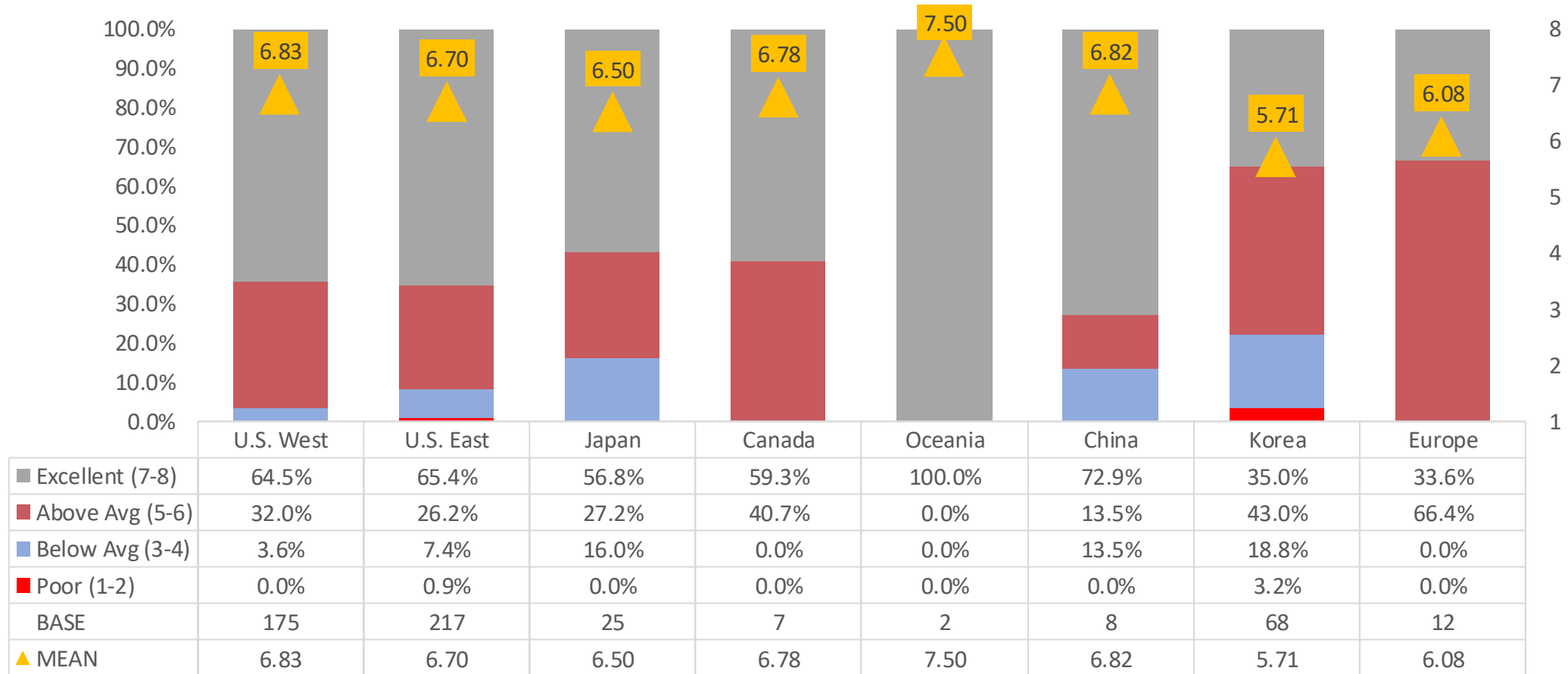
SHOPPING - ISLAND OF HAWAI‘I

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



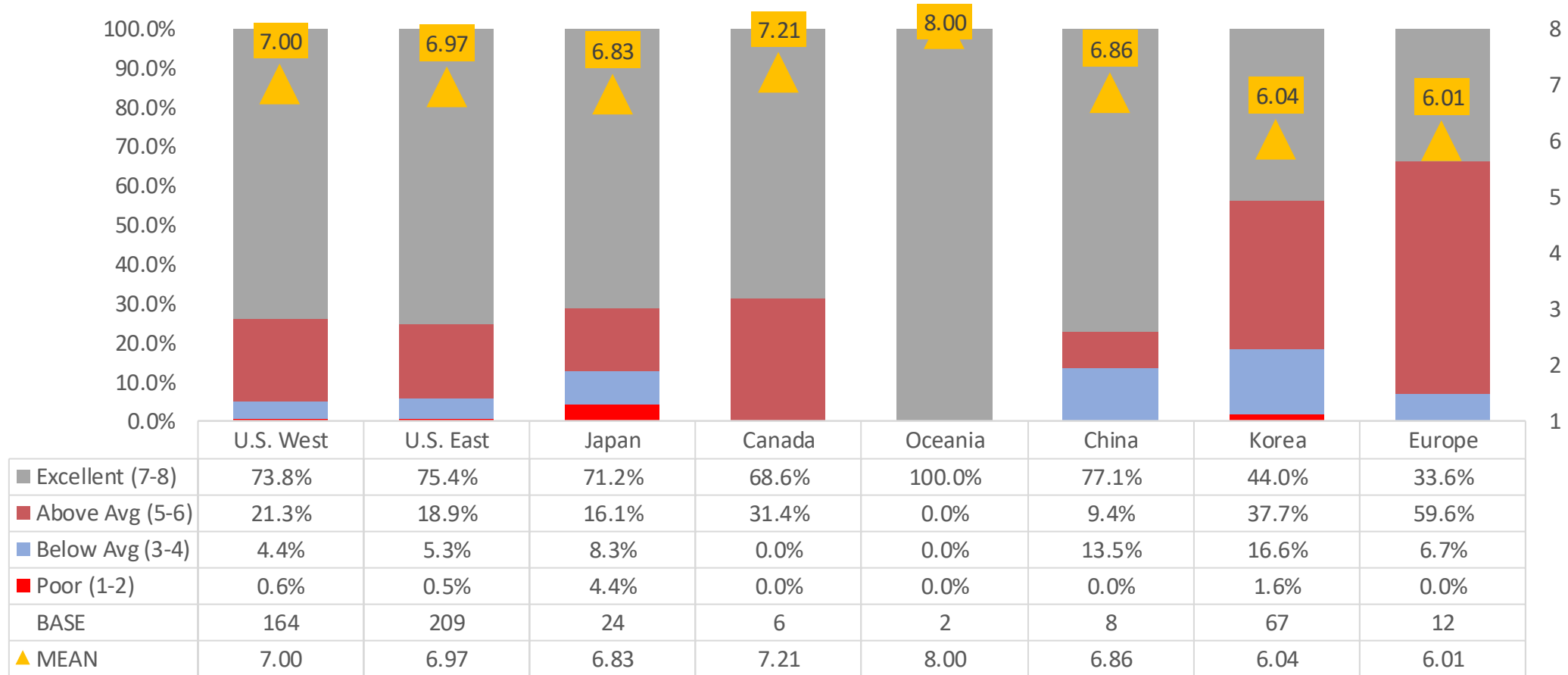
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



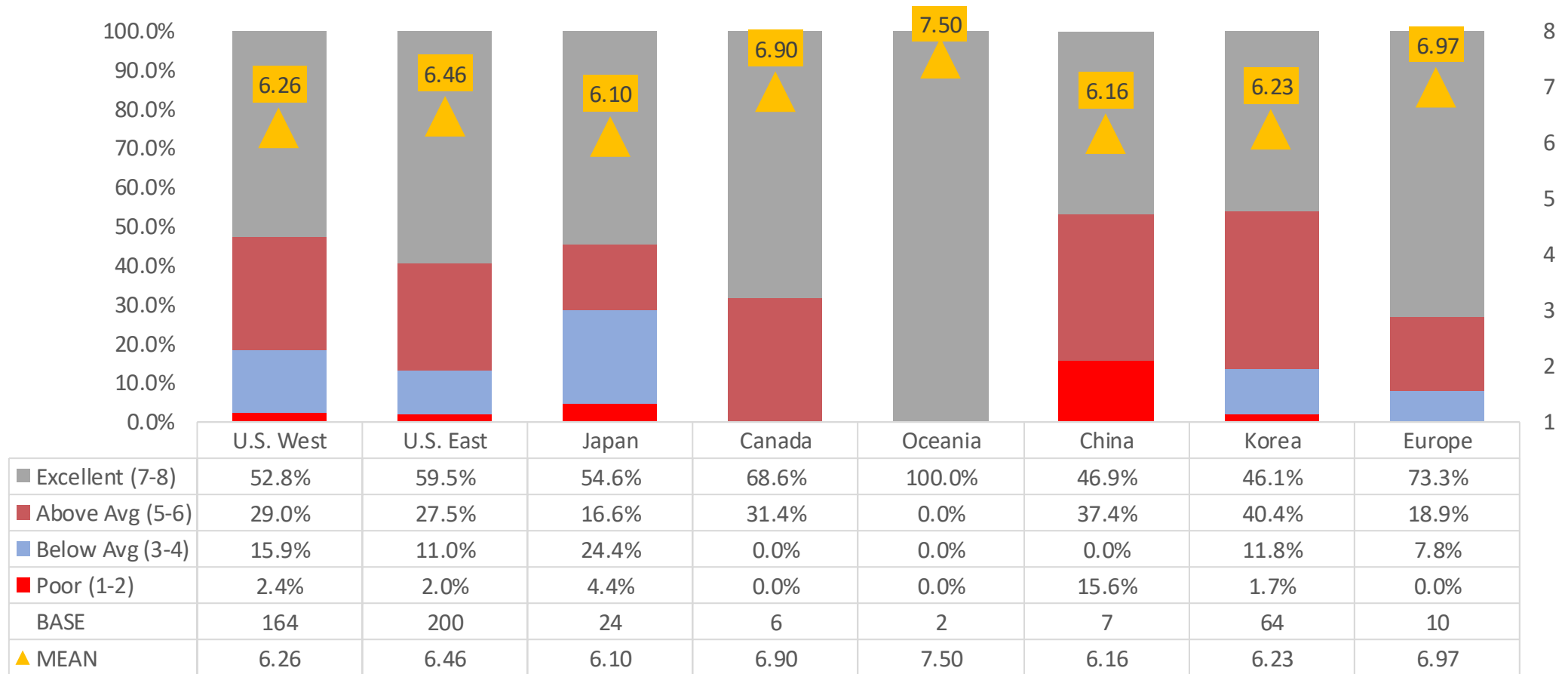
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



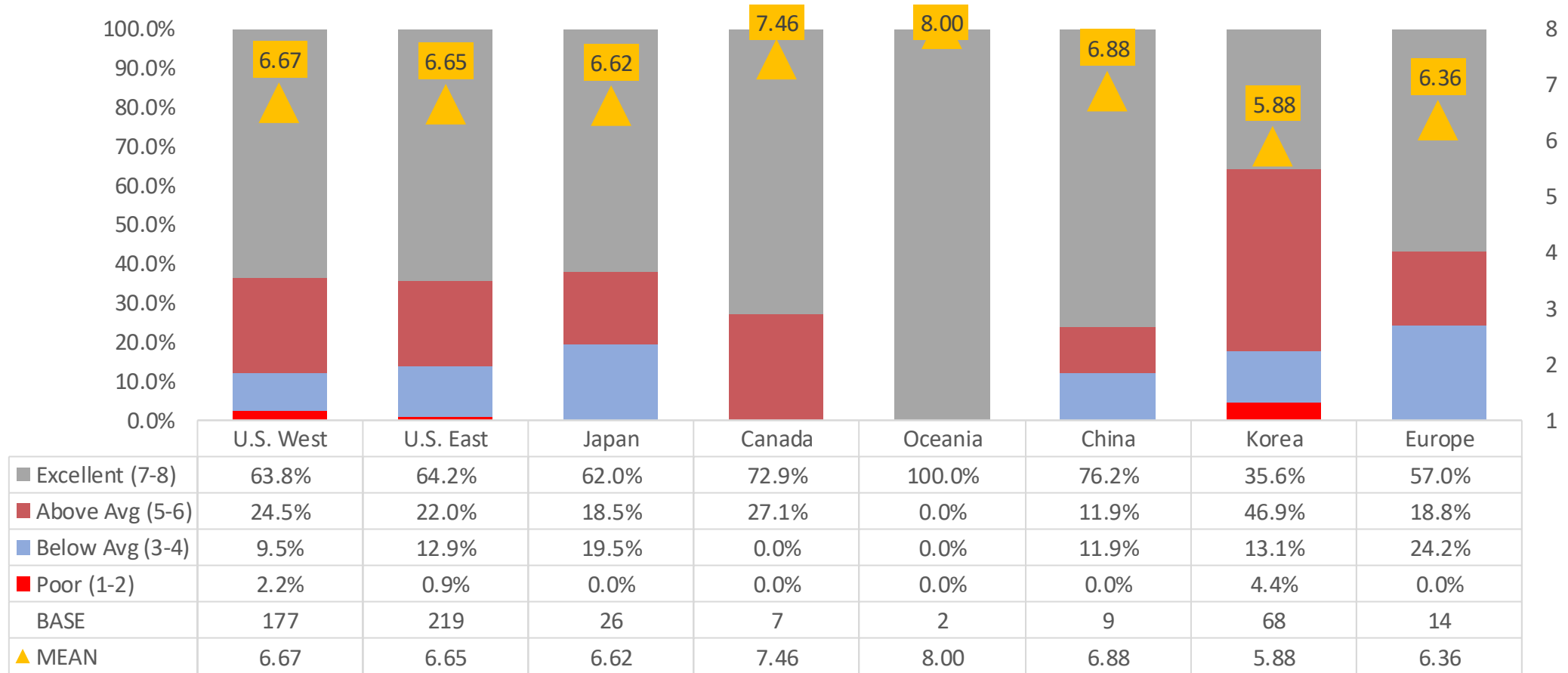
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



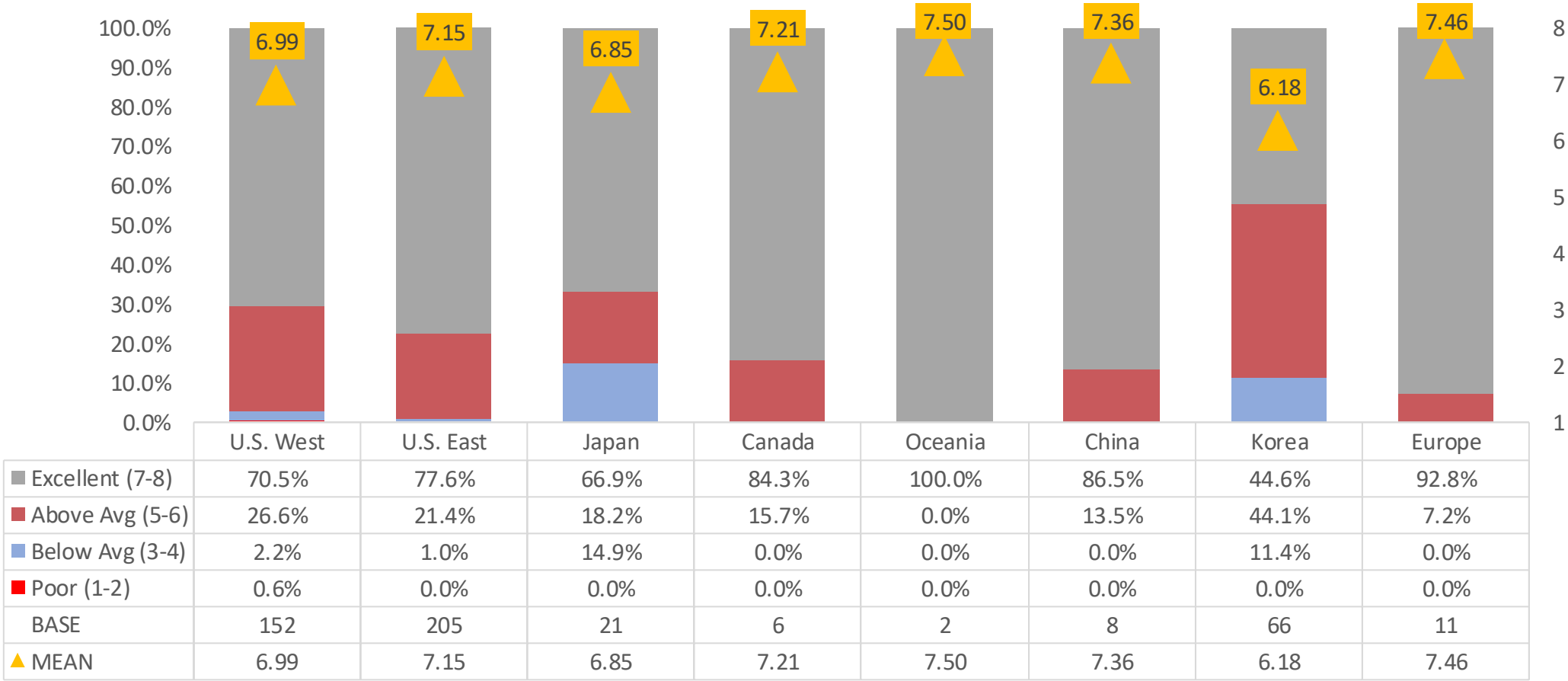
AIRPORT - ISLAND OF HAWAI'I

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



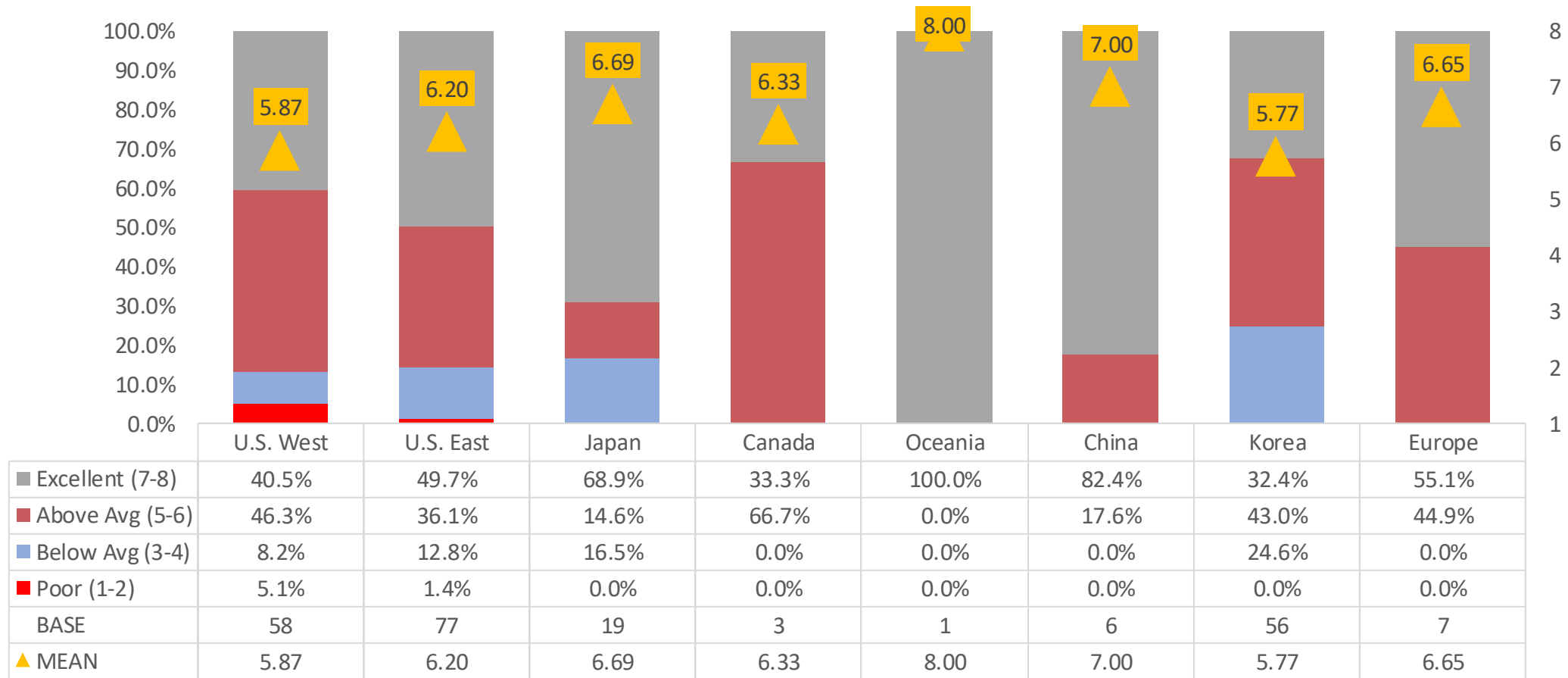
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



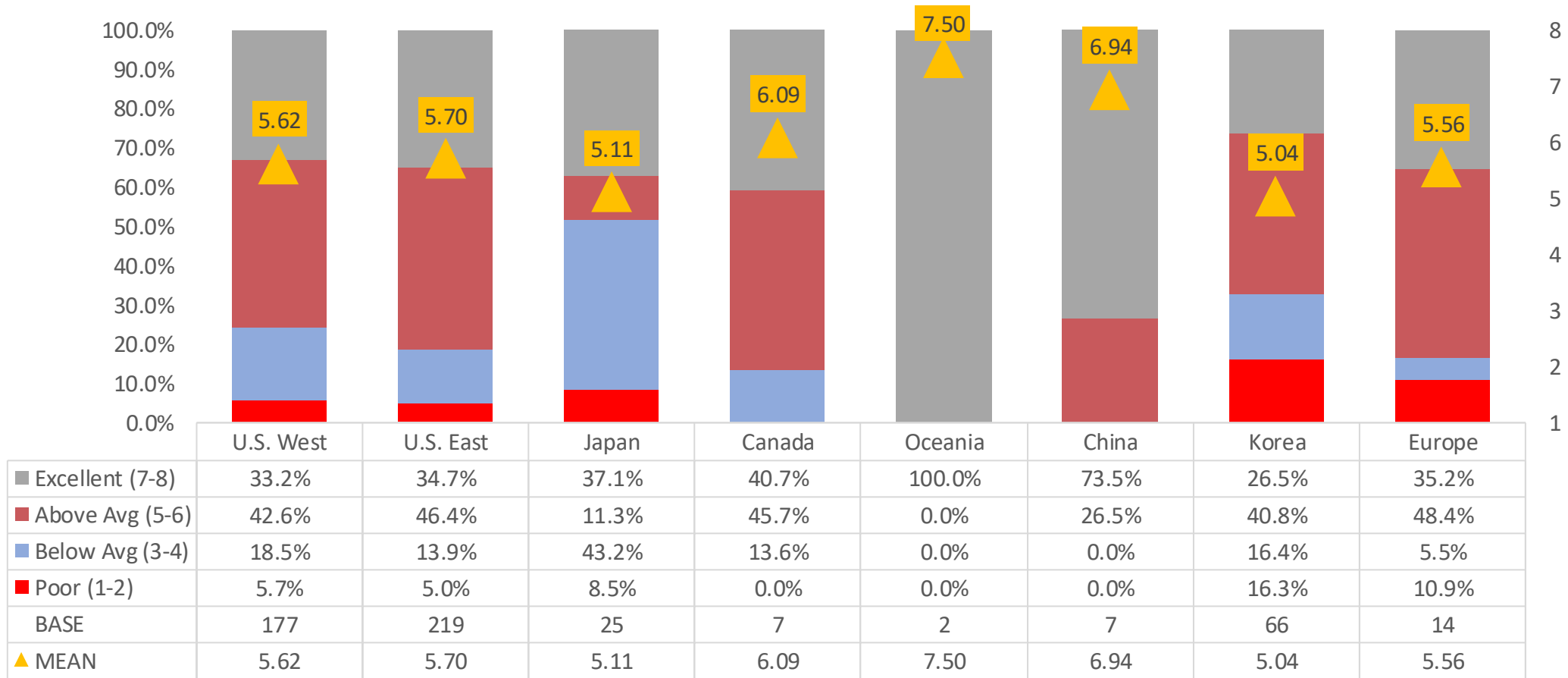
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



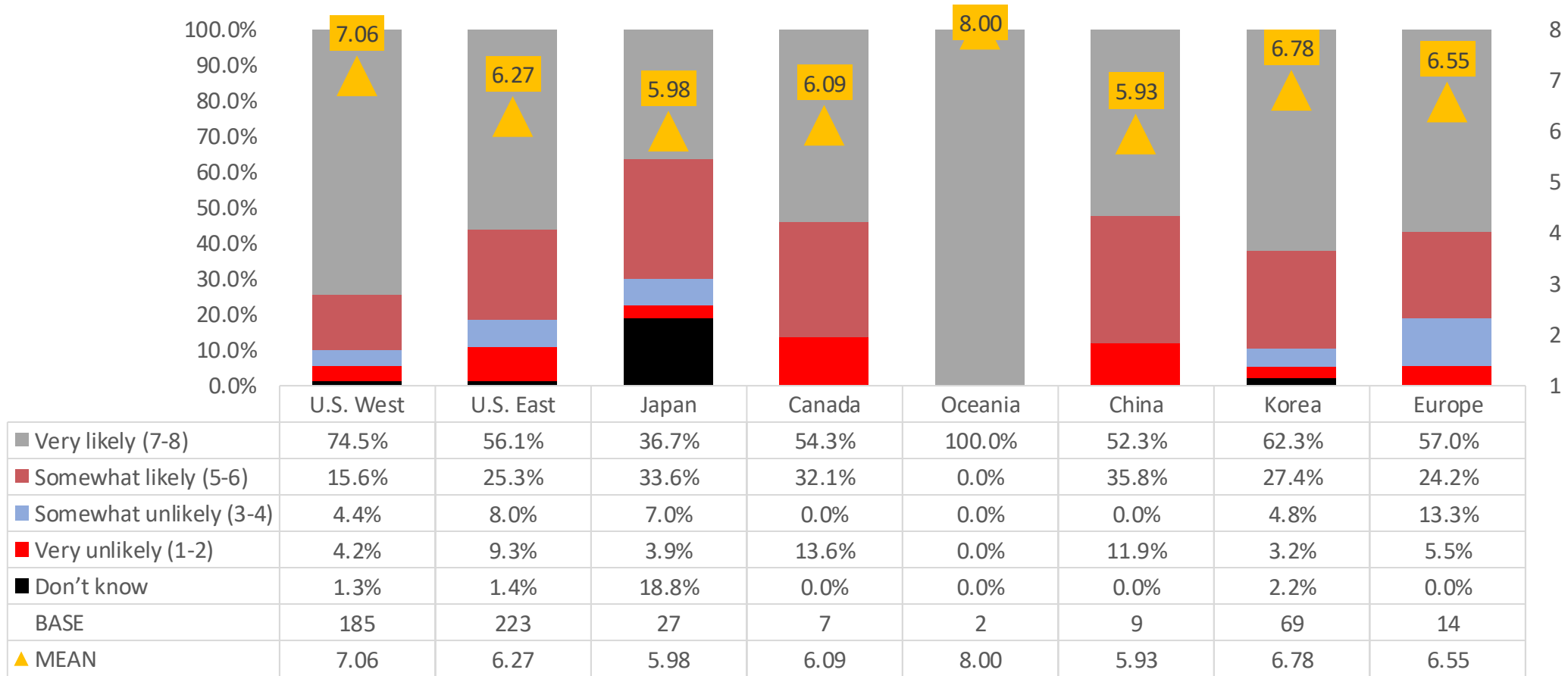
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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

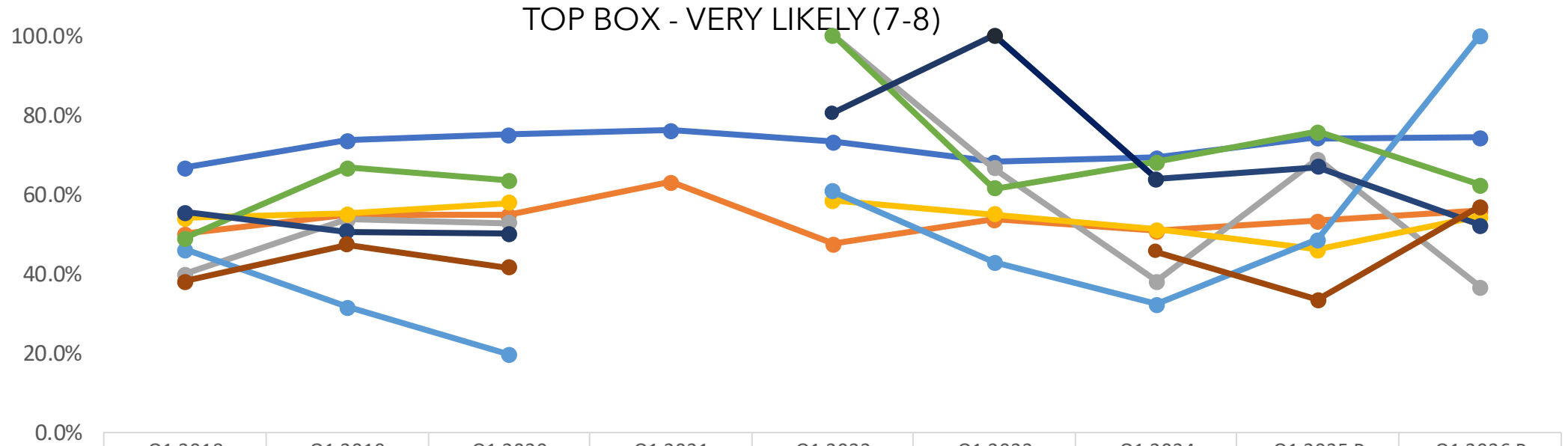


LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023	Q1 2024	Q1 2025 P	Q1 2026 P
U.S. West	66.8%	73.6%	75.0%	76.3%	73.4%	68.1%	69.3%	74.4%	74.5%
U.S. East	50.1%	54.8%	54.8%	63.3%	47.6%	53.9%	50.9%	53.4%	56.1%
Japan	39.9%	53.9%	52.8%		100.0%	66.5%	38.0%	68.9%	36.7%
Canada	54.2%	55.2%	57.8%		58.3%	55.0%	51.2%	46.0%	54.3%
Oceania	46.1%	31.5%	19.6%		60.8%	42.7%	32.2%	48.5%	100.0%
Korea	49.2%	66.9%	63.4%		100.0%	61.5%	68.3%	75.9%	62.3%
China	55.6%	50.6%	50.1%		80.4%	100.0%	63.8%	66.9%	52.3%
Europe	38.3%	47.4%	41.6%				45.5%	33.4%	57.0%

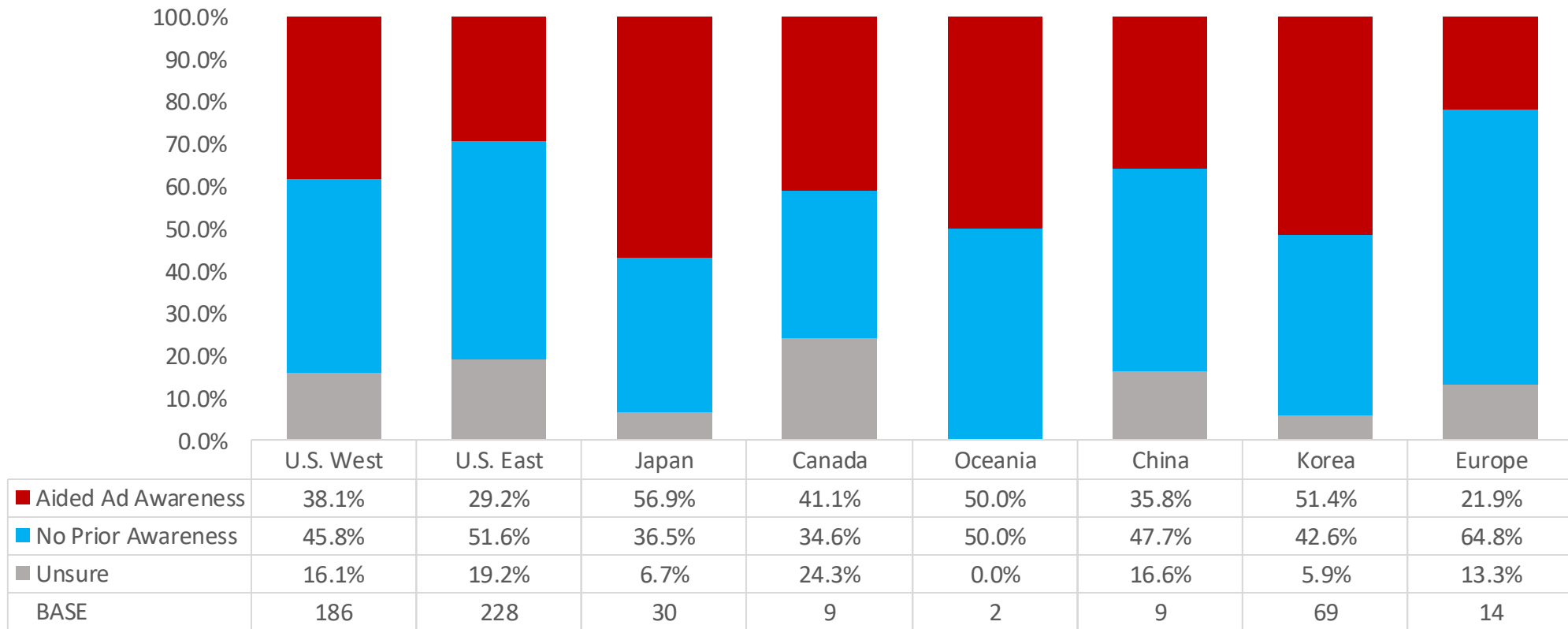
P= Preliminary Data

Q. How likely are you to visit the island of Hawai'i again in the next five years?

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.



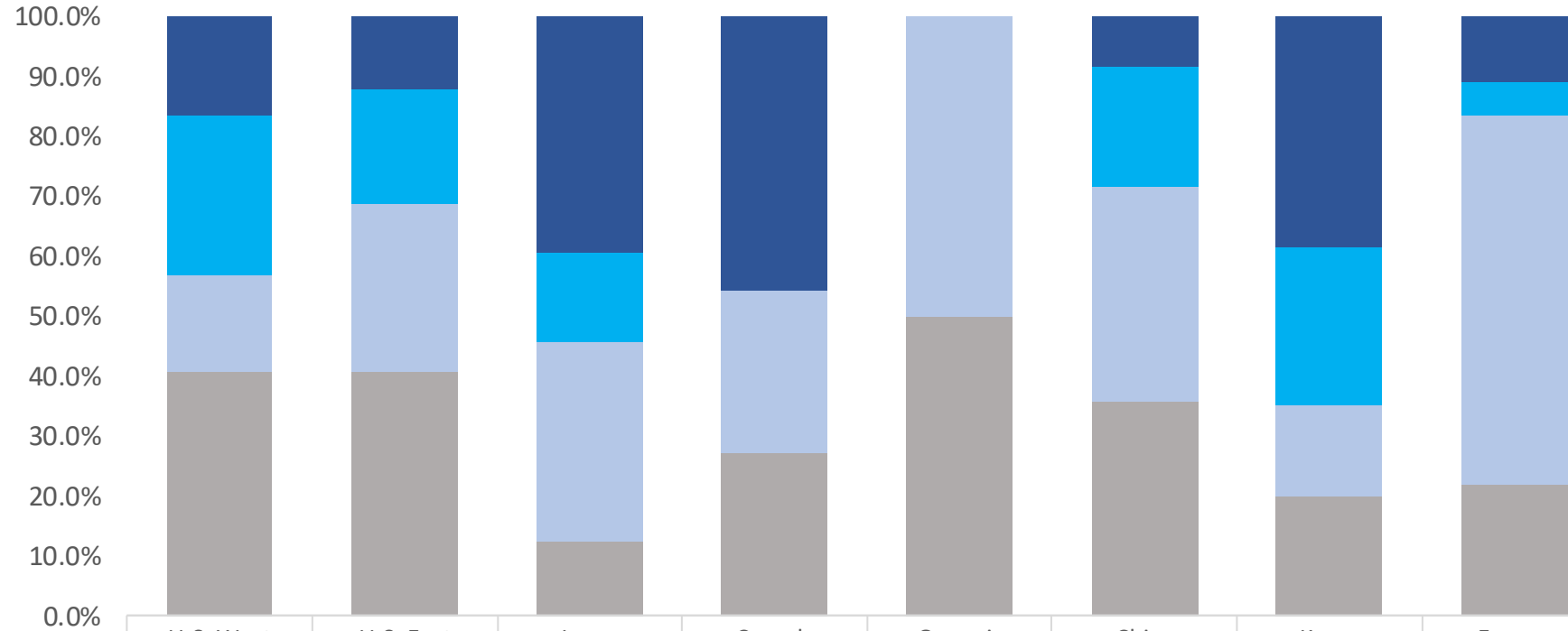
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI‘I

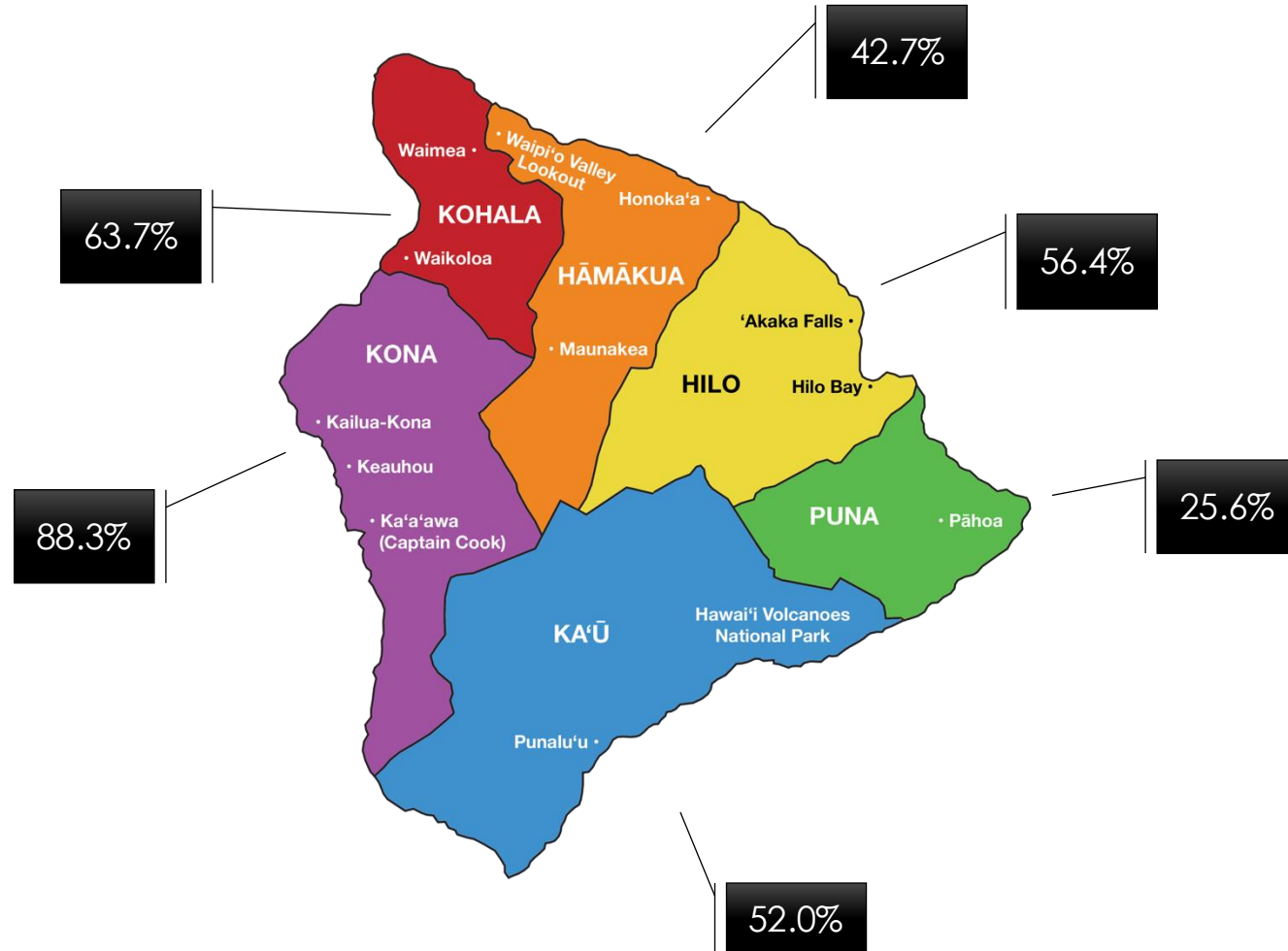
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Television programs or movies filmed in Hawai‘i	11.1%	11.9%	23.5%	10.3%	50.0%	35.8%	14.6%	32.0%
Hawaiian music	16.1%	11.5%	17.3%	10.3%	50.0%	0.0%	11.4%	10.9%
Social media posts and videos	17.6%	15.3%	30.2%	20.5%	50.0%	0.0%	22.7%	18.8%
Outdoor or sporting activities and events	12.0%	13.9%	7.1%	44.9%	50.0%	20.2%	10.3%	10.9%
Hawaiian cultural experiences and Hawaiian cultural events	27.1%	25.3%	23.1%	30.8%	50.0%	40.4%	6.6%	27.3%
Famous landmarks or imagery/ natural beauty (beaches, mountains, etc.)	58.8%	60.6%	50.2%	75.7%	100.0%	88.1%	67.5%	51.6%
Attend a festival or other event	2.6%	4.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	186	228	30	9	2	9	69	14

TRAVEL ON ISLAND OF HAWAI'I

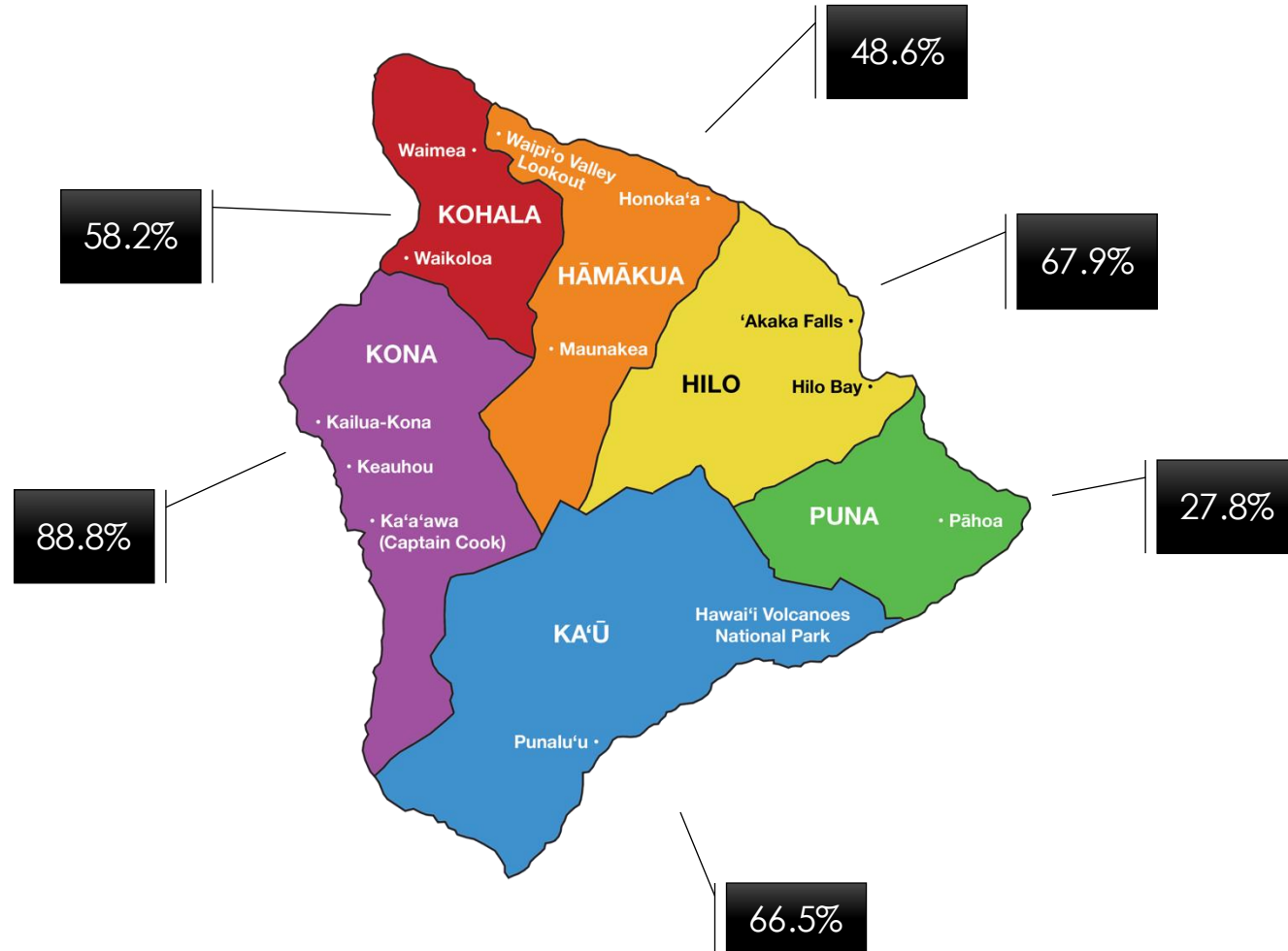


	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
■ Short drive from accommodation	16.5%	12.1%	39.4%	45.7%	0.0%	8.3%	38.6%	10.9%
■ Traveled 1 hour or less one-way to reach activities	26.7%	19.1%	14.9%	0.0%	0.0%	20.2%	26.3%	5.5%
■ Traveled more than 1 hour one-way to reach activities	16.0%	28.2%	33.5%	27.1%	50.0%	35.8%	15.4%	61.7%
■ Traveled to the other side of the island	40.8%	40.6%	12.2%	27.1%	50.0%	35.8%	19.8%	21.9%
● BASE	175	218	26	7	2	9	68	14

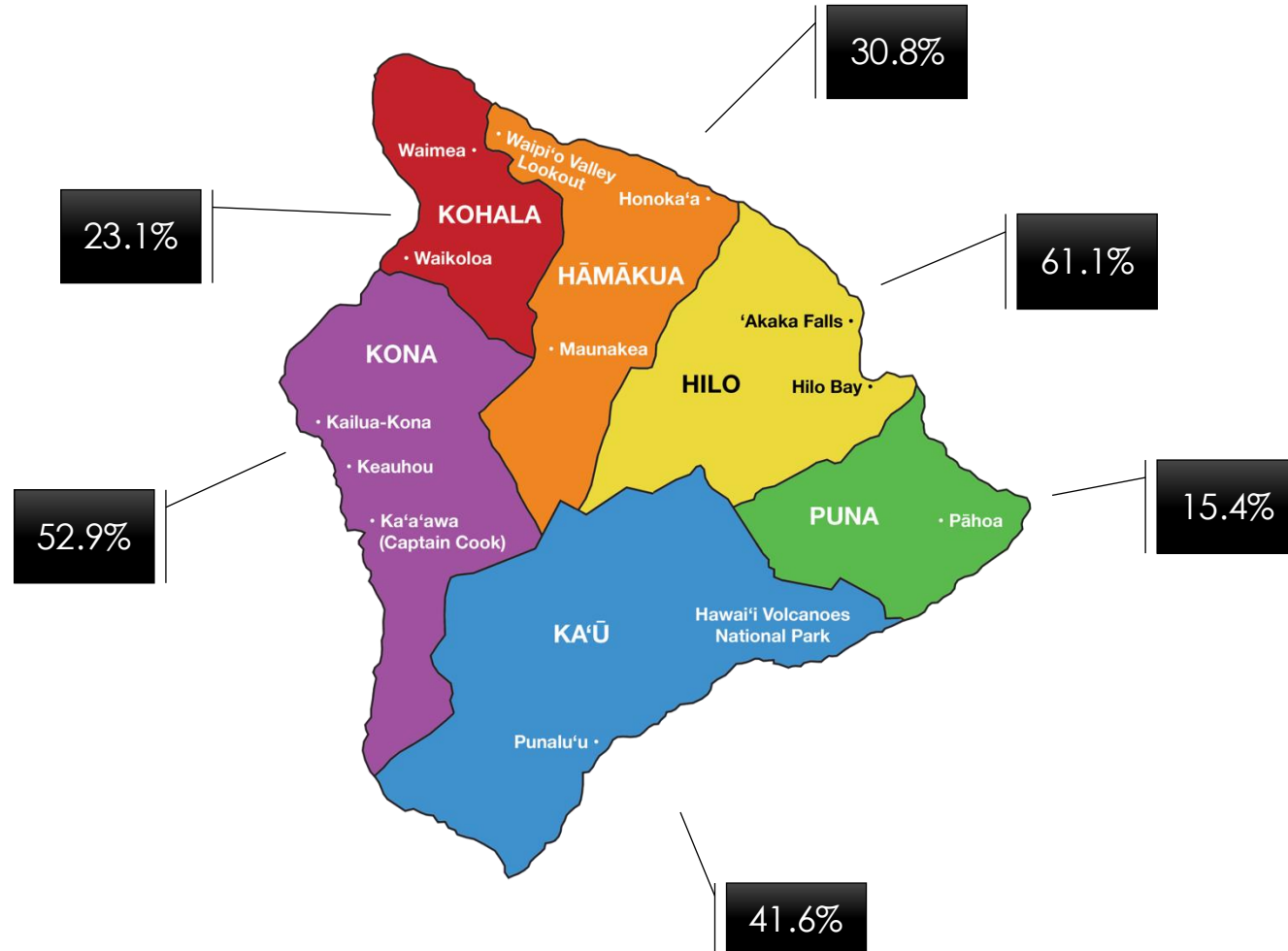
AREAS VISITED - ISLAND OF HAWAI'I U.S. WEST



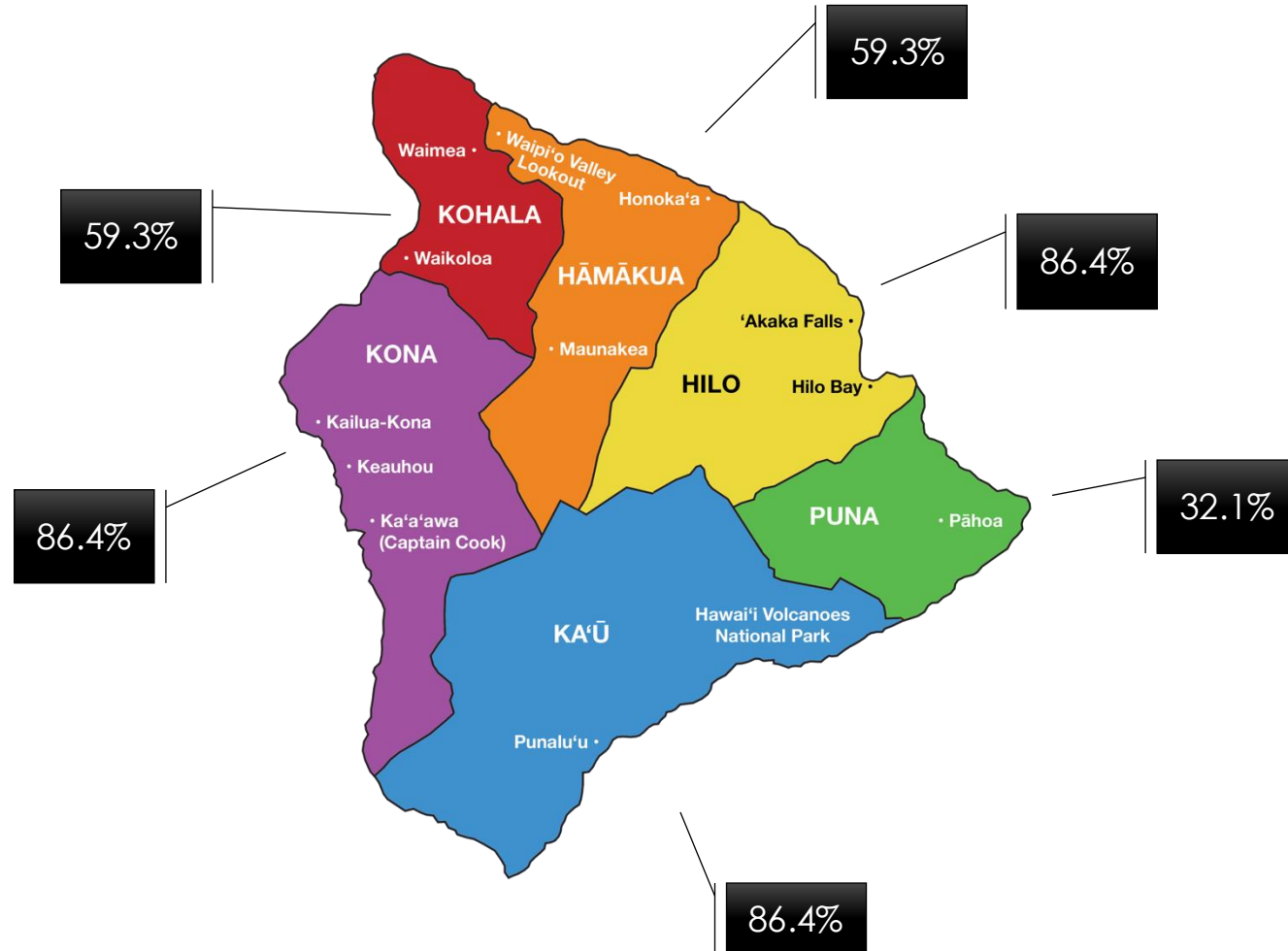
AREAS VISITED - ISLAND OF HAWAI'I U.S. EAST



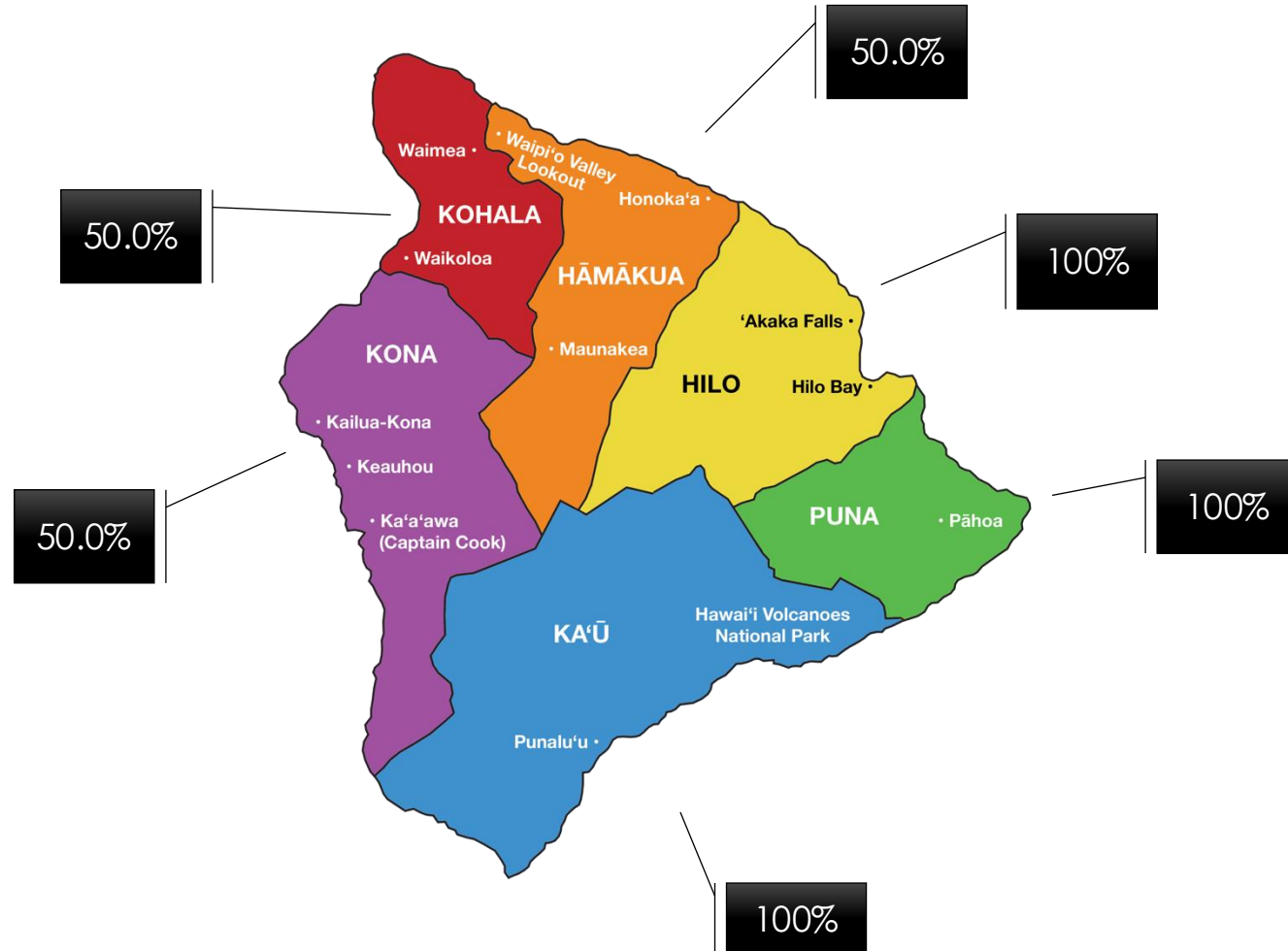
AREAS VISITED - ISLAND OF HAWAI'I JAPAN



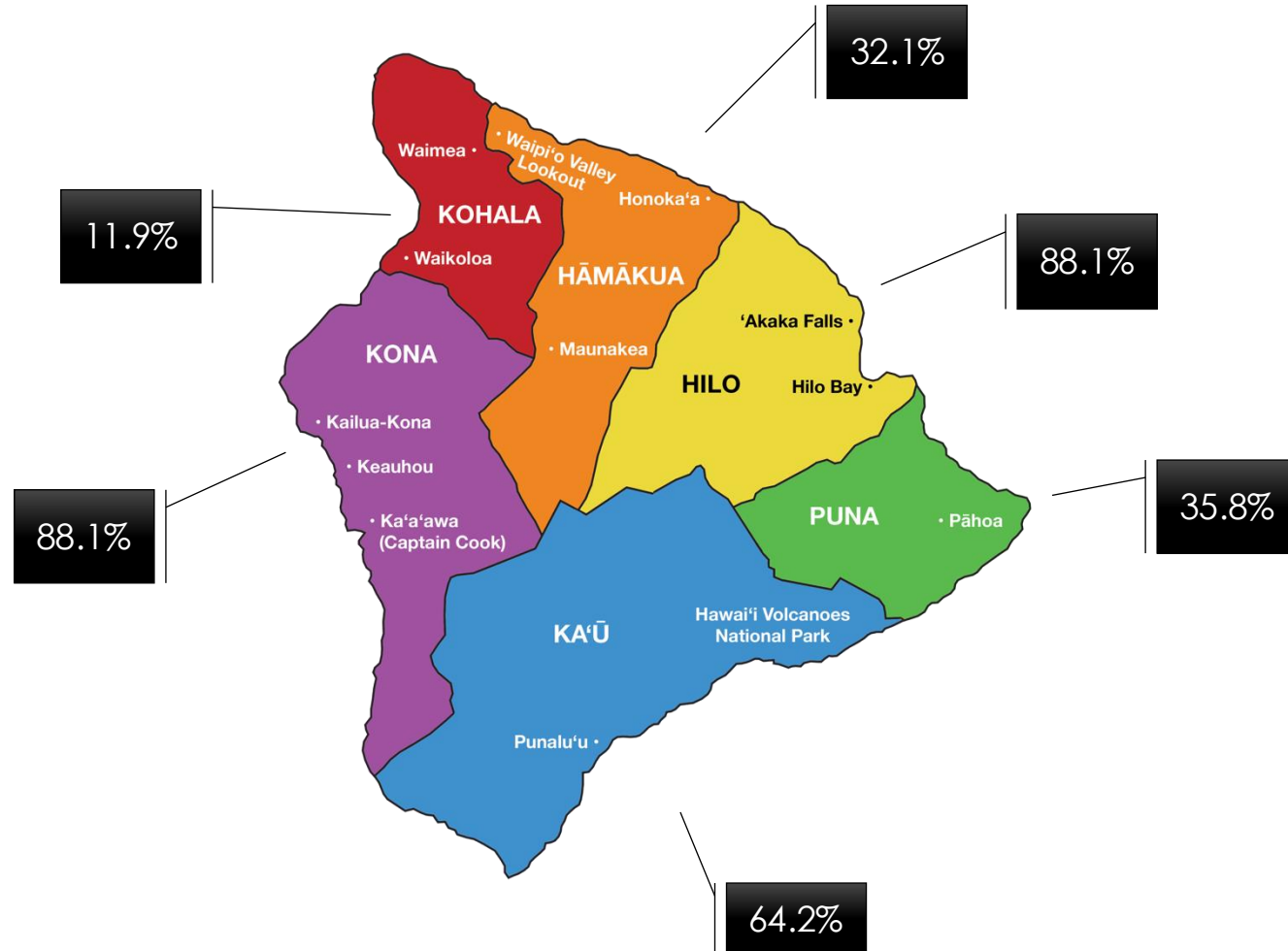
AREAS VISITED - ISLAND OF HAWAI'I CANADA



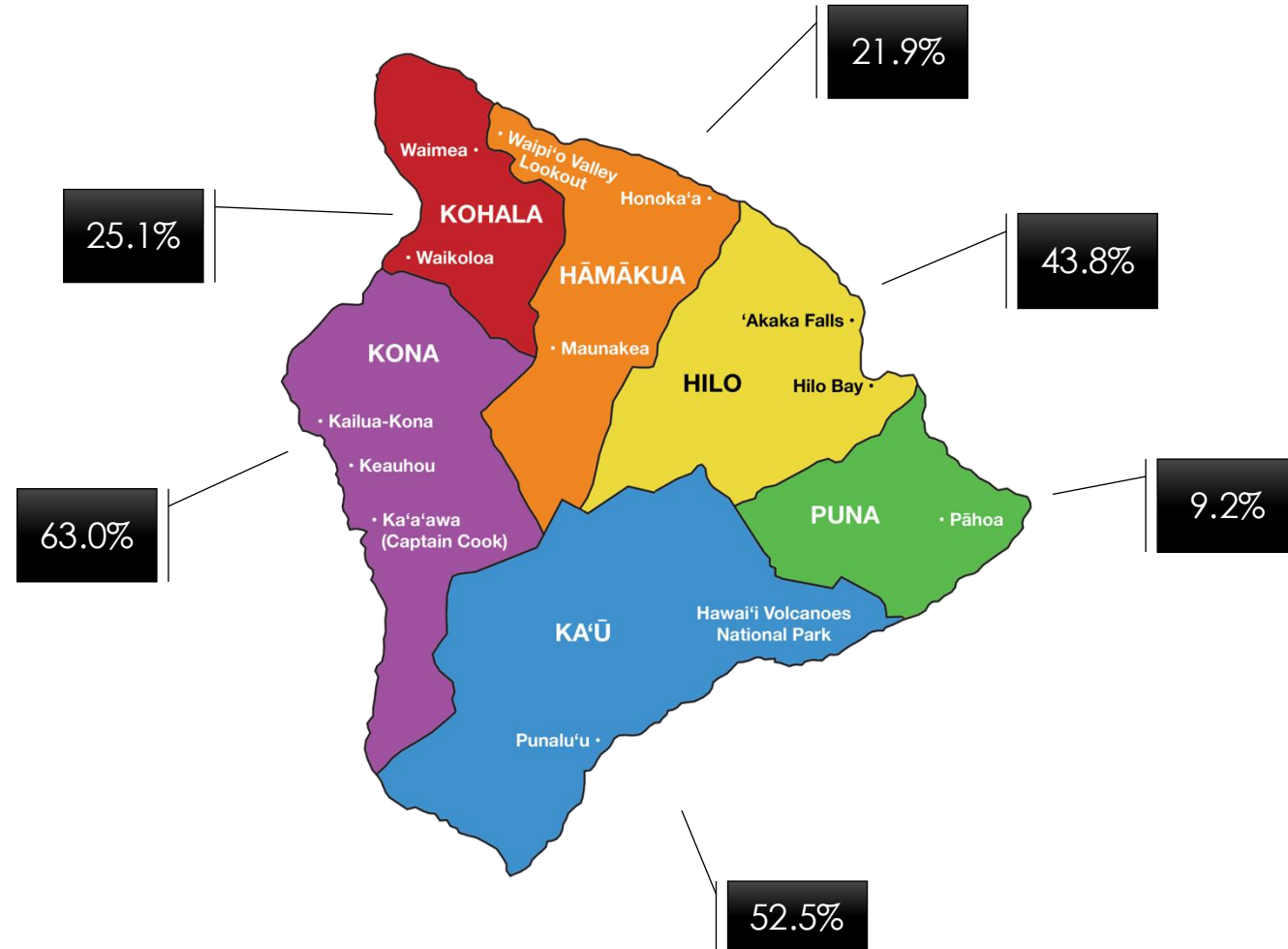
AREAS VISITED - ISLAND OF HAWAI'I OCEANIA



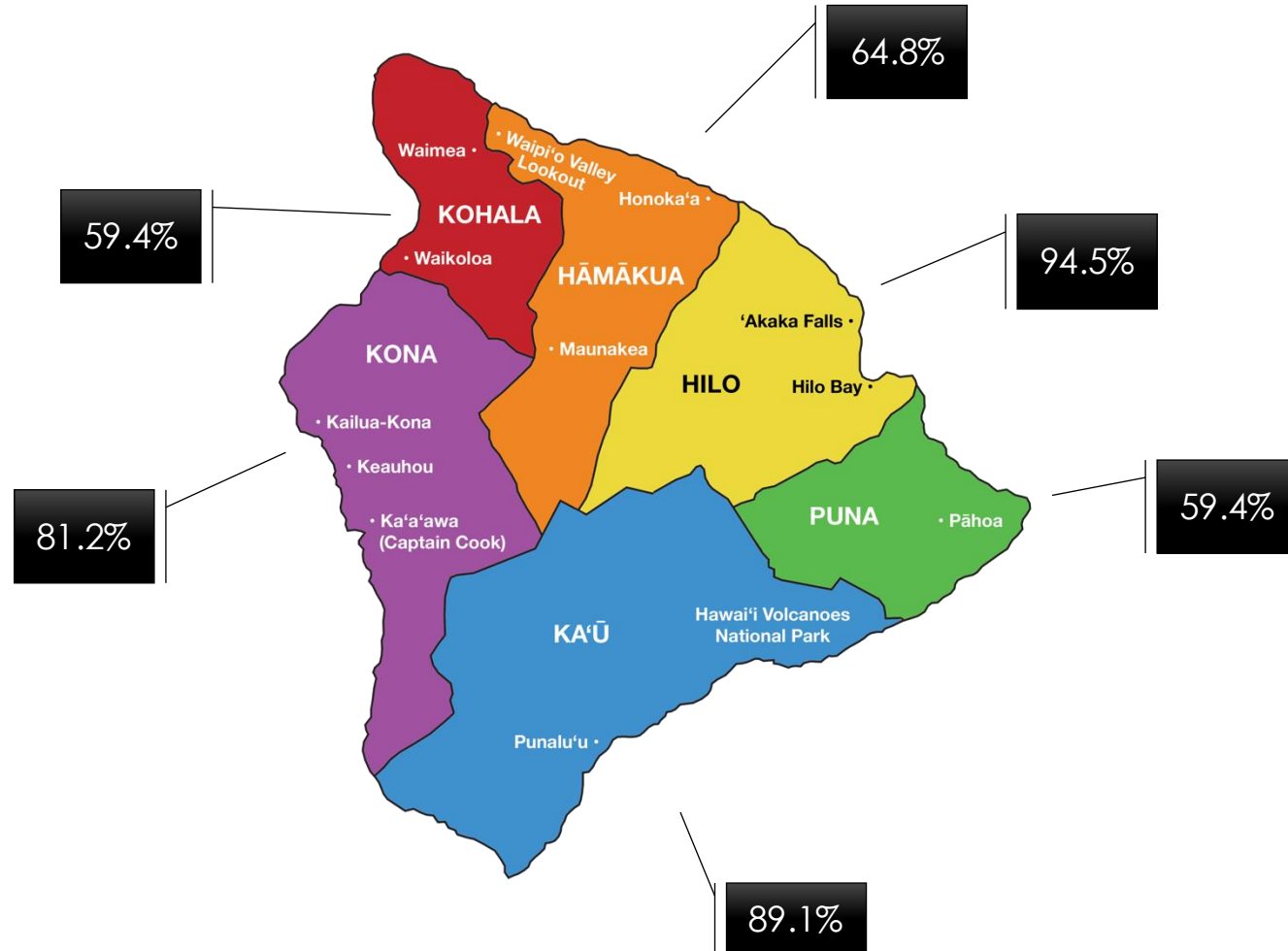
AREAS VISITED - ISLAND OF HAWAI'I CHINA



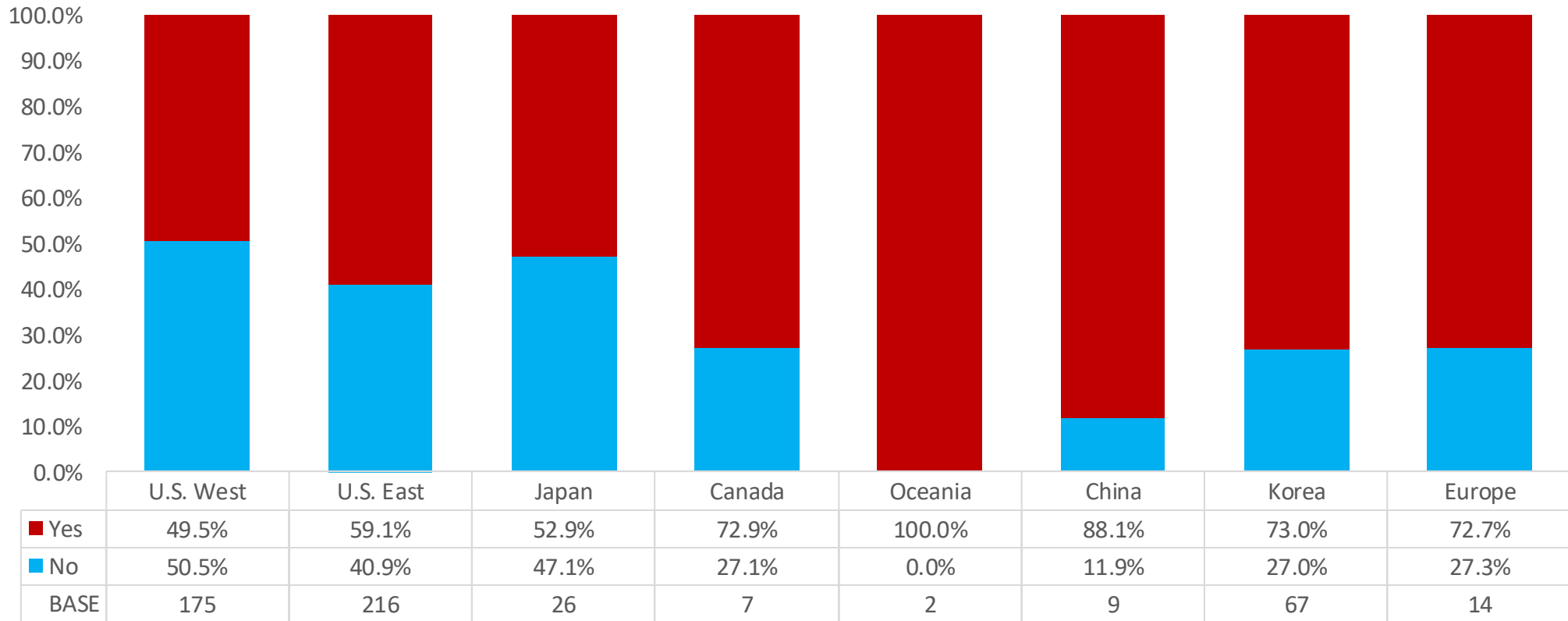
AREAS VISITED - ISLAND OF HAWAI'I KOREA



AREAS VISITED - ISLAND OF HAWAI'I EUROPE

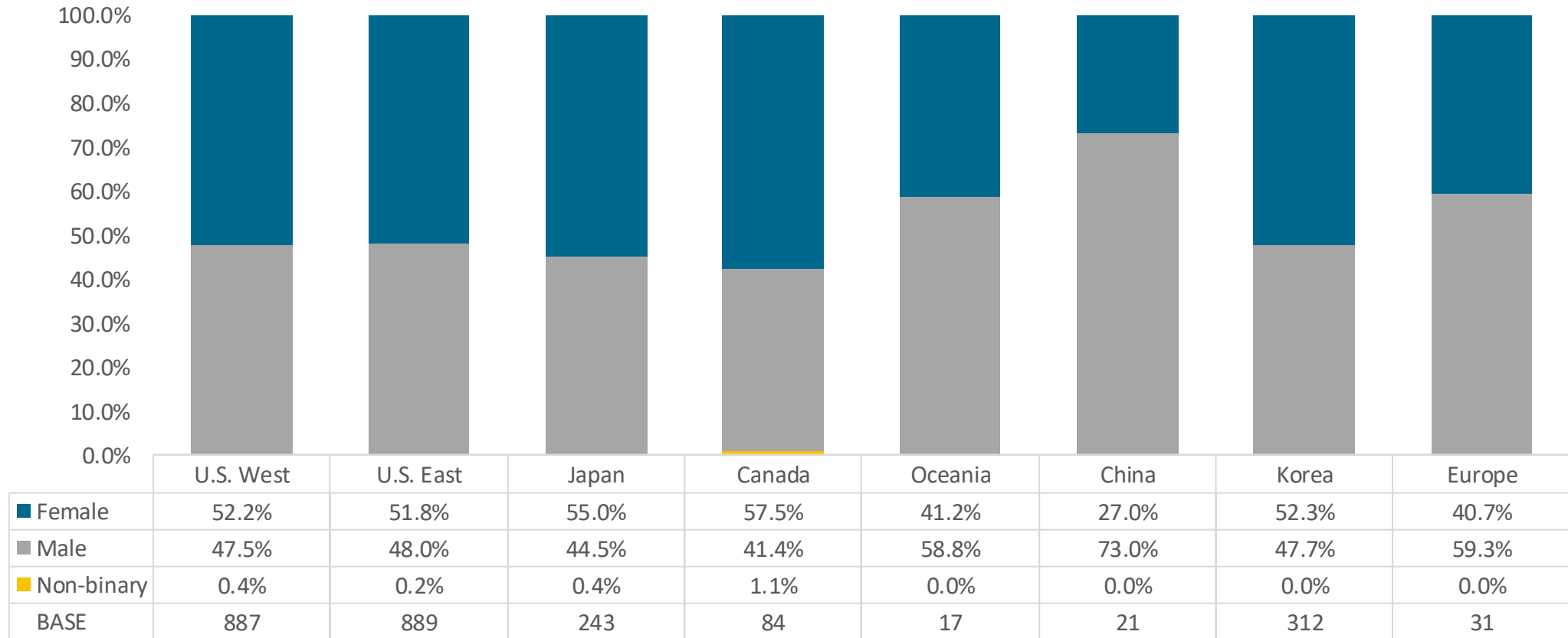


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

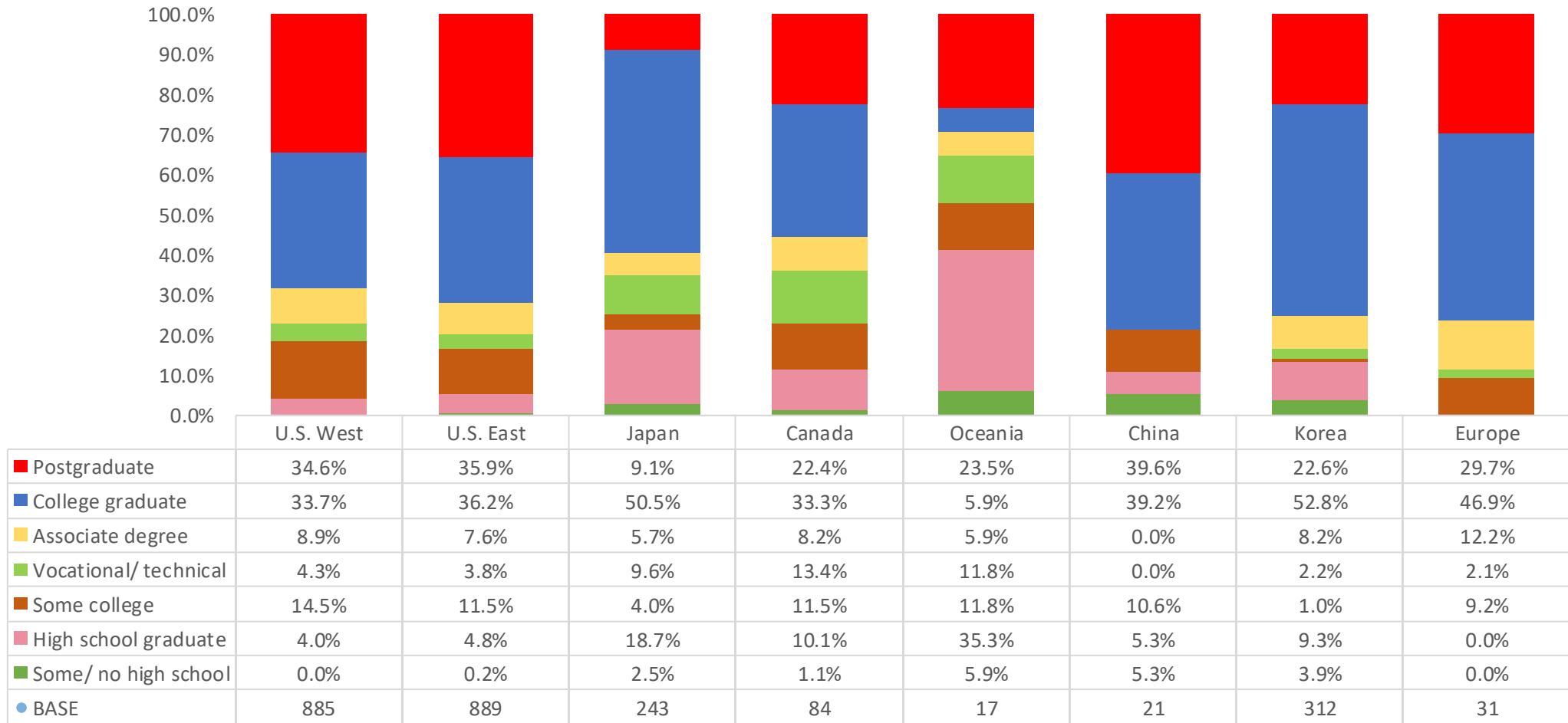


Section 11 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE - HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	3.3%	4.6%	4.9%	0.0%	15.1%
\$40,000 to \$59,999	5.1%	4.7%	6.0%	11.8%	12.2%
\$60,000 to \$79,999	6.7%	6.4%	7.5%	11.8%	16.3%
\$80,000 to \$99,999	9.5%	8.3%	10.4%	0.0%	11.3%
\$100,000 to \$124,999	14.0%	15.4%	14.6%	17.6%	0.0%
\$125,000 to \$149,999	13.6%	11.3%	13.1%	5.9%	11.3%
\$150,000 to \$174,999	8.7%	10.9%	6.8%	5.9%	2.1%
\$175,000 to \$199,999	6.8%	7.6%	7.8%	5.9%	13.4%
\$200,000 to \$249,999	9.0%	8.7%	12.6%	11.8%	2.1%
\$250,000 +	23.2%	22.1%	16.4%	29.4%	16.3%
BASE	879	879	84	17	31

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	16.6%
¥3.5 - ¥4.5 million	9.2%
¥4.5 - ¥5.5 million	8.6%
¥5.5 - ¥6.5 million	8.4%
¥6.5 - ¥7.5 million	6.2%
¥7.5 - ¥8.5 million	4.0%
¥8.5 - ¥10.0 million	11.6%
¥10.0 - ¥15.0 million	18.4%
¥15.0 - ¥20.0 million	8.2%
¥20.0 million +	8.7%
BASE	242

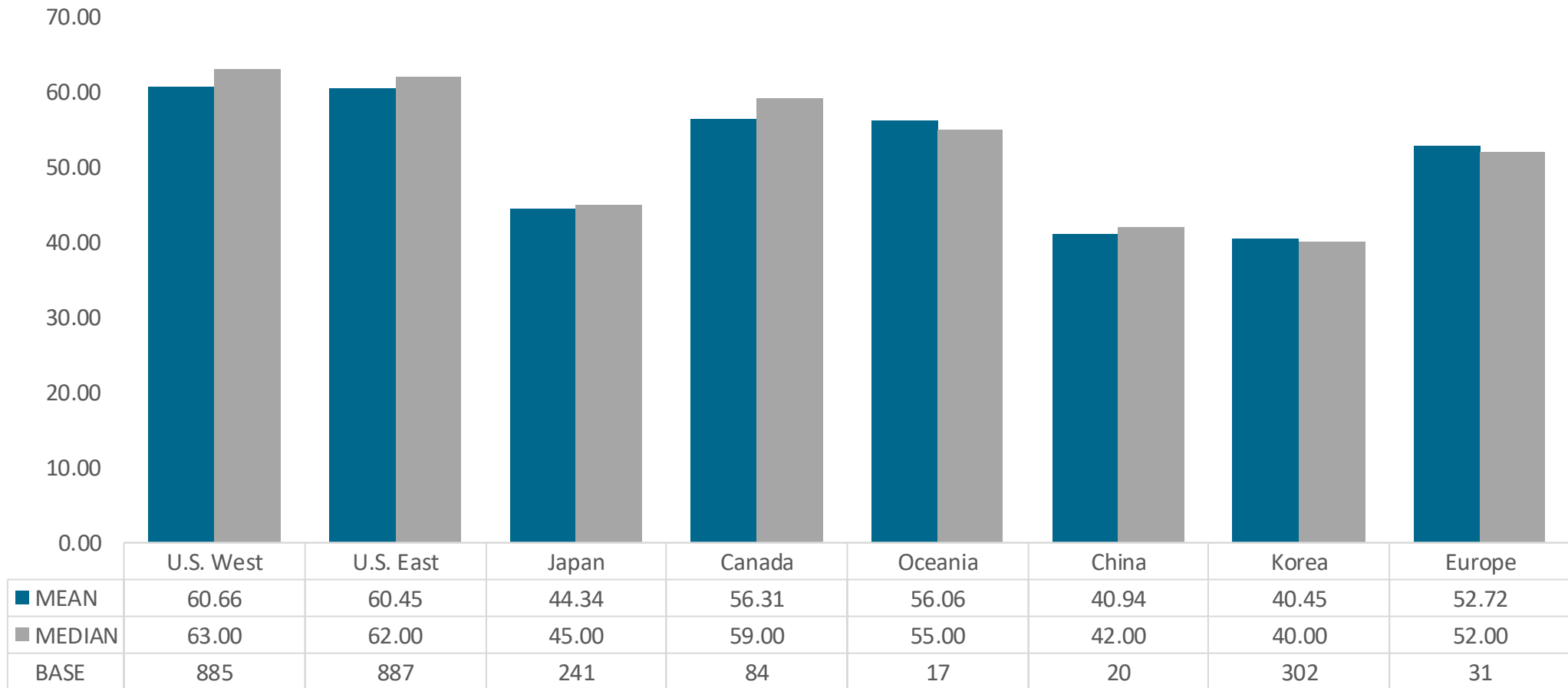
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	12.3%
₩16,305,000 - ₩27,173,999	2.3%
₩27,174,000 - ₩38,041,999	9.2%
₩38,042,000 - ₩48,911,999	7.4%
₩48,912,000 - ₩59,781,999	9.6%
₩59,782,000 - ₩70,652,999	8.6%
₩70,653,000 - ₩81,520,999	7.2%
₩81,521,000 - ₩92,390,999	6.4%
₩92,391,000 - ₩103,259,999	5.9%
₩103,260,000 - ₩149,999,999	10.3%
₩150,000,000 - ₩199,999,999	7.2%
₩200,000,000+	13.7%
BASE	310

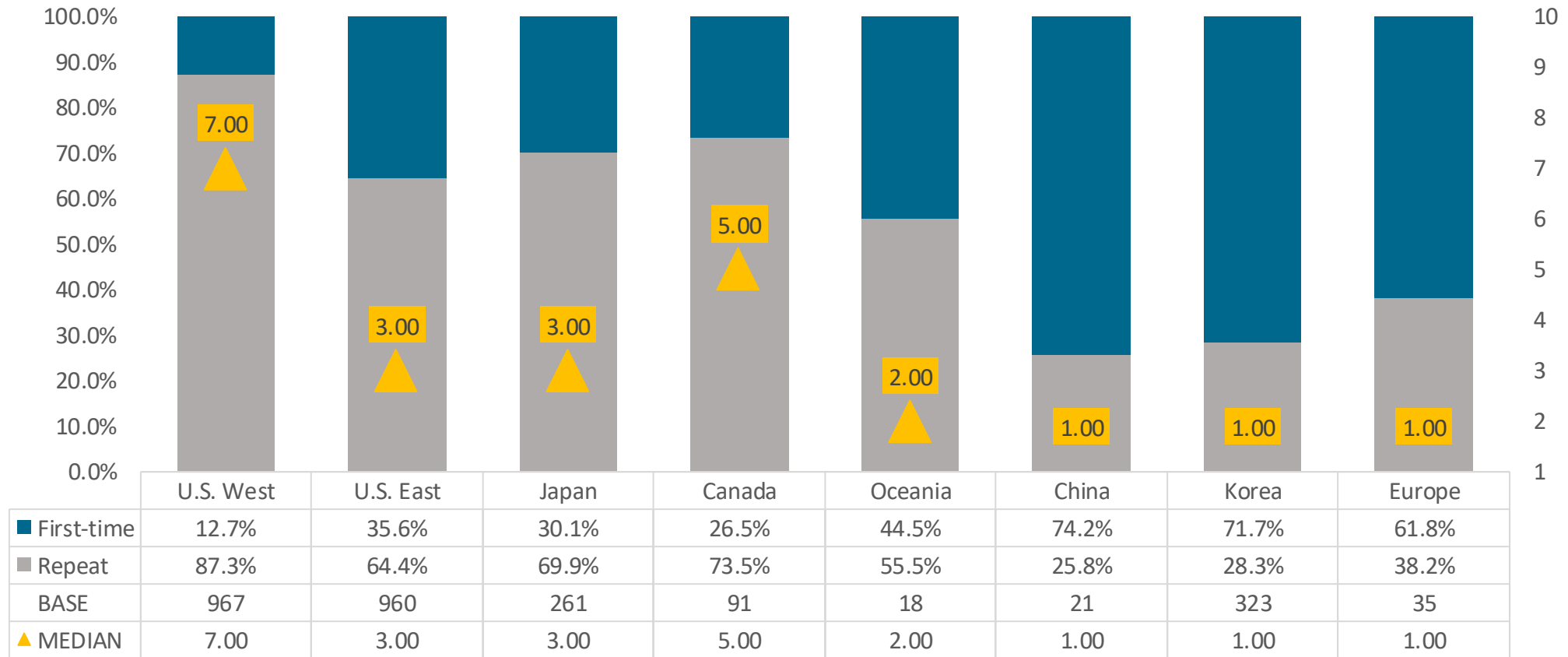
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	10.6%
¥250,800 – ¥376,099	28.6%
¥376,100 – ¥501,399	10.6%
¥501,400 – ¥626,799	7.4%
¥626,800 – ¥783,499	10.6%
¥783,500 – ¥940,199	3.7%
¥940,200 – ¥1,096,899	5.3%
¥1,096,900 - ¥1,253,599	0.0%
¥1,253,600 – ¥1,560,799	9.0%
¥1,560,800+	14.3%
BASE	21

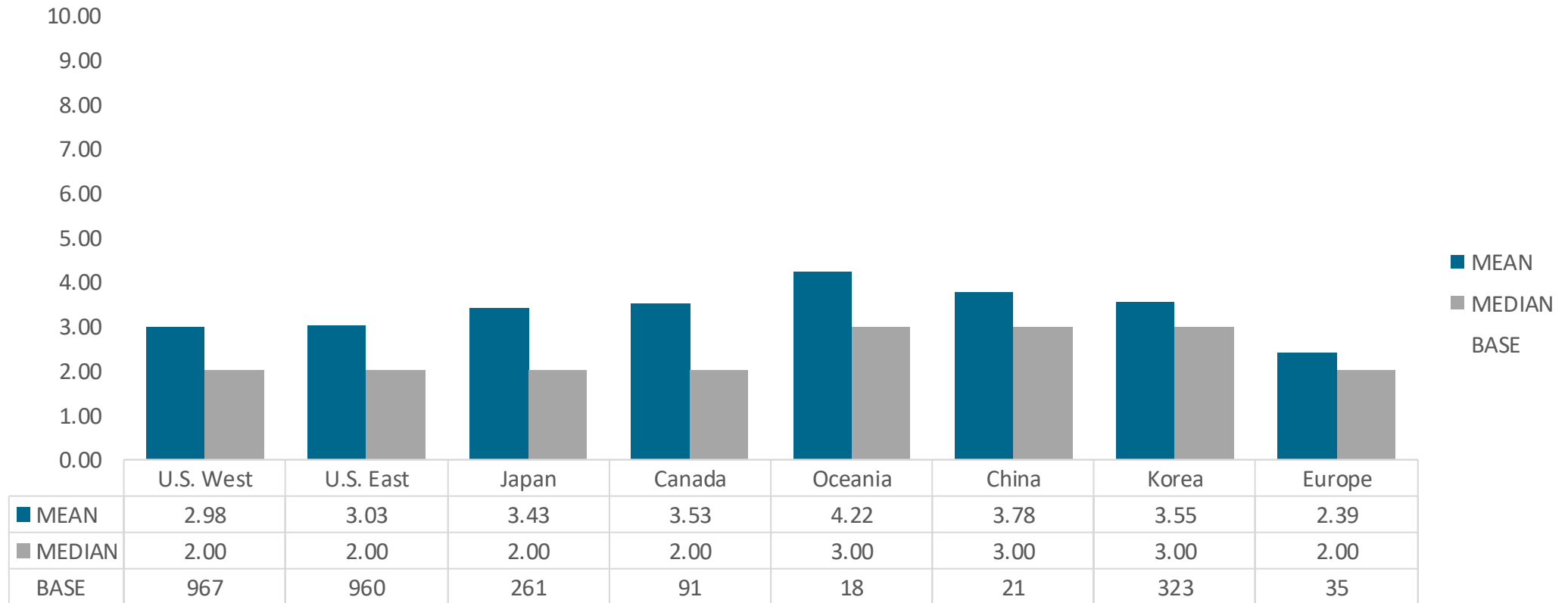
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
My spouse	63.6%	67.1%	57.7%	72.2%	61.1%	39.2%	53.6%	41.0%
Other adult members of my family	27.5%	25.4%	29.7%	22.2%	27.8%	51.8%	33.1%	8.1%
My child(ren)/ grandchild(ren) under 18	14.8%	11.2%	17.0%	26.0%	33.3%	21.2%	23.9%	8.8%
My friends/ associates	14.1%	14.4%	12.5%	12.7%	11.1%	19.6%	10.9%	16.9%
Myself only (traveled alone/ no one else)	9.9%	10.4%	8.0%	5.5%	0.0%	9.0%	5.8%	39.2%
My girlfriend/ boyfriend	6.1%	3.9%	1.9%	3.4%	0.0%	0.0%	0.0%	3.6%
Same gender partner	0.7%	0.9%	0.0%	0.0%	11.1%	0.0%	0.0%	1.8%
BASE	967	960	261	91	18	21	323	35

Section 12 – 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 for the island of O'ahu.

MMA	SURVEYS	Margin of Error \pm
U.S. West	369	5.10
U.S. East	543	4.21
Japan	249	6.21
Canada	53	13.46
Oceania	18	23.10
China	21	21.39
Korea	294	5.72
Europe	18	23.10
All MMAs	1,565	2.48

* Margins of error are presented at the 95% level of confidence



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

MMA	SURVEYS	Margin of Error ±
U.S. West	234	6.41
U.S. East	259	6.09
Japan	0	
Canada	8	34.65
Oceania	0	
China	0	
Korea	10	30.99
Europe	10	30.99
All MMAs	521	4.29

* Margins of error are presented at the 95% level of confidence



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MAUI

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

MMA	SURVEYS	Margin of Error \pm
U.S. West	314	5.53
U.S. East	353	5.22
Japan	4	49.00
Canada	40	15.50
Oceania	2	69.30
China	1	98.00
Korea	43	14.94
Europe	12	28.29
All MMAs	769	3.53

* Margins of error are presented at the 95% level of confidence



METHODOLOGY & SAMPLE SIZE - ISLAND VSAT ISLAND OF HAWAI‘I

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

MMA	SURVEYS	Margin of Error ±
U.S. West	204	6.86
U.S. East	303	5.63
Japan	30	17.89
Canada	12	28.29
Oceania	2	69.30
China	9	32.67
Korea	75	11.32
Europe	17	23.77
All MMAs	652	3.84

* Margins of error are presented at the 95% level of confidence

