

# Visitor Satisfaction Study

Q1 2021

Prepared for:  
Hawai'i Tourism Authority

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# METHODOLOGY – OVERALL

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight major market areas (MMAs) who recently completed a trip to Hawai'i. For Q1 2021, the sampled MMAs include: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.).

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>	<b>Response Rate</b>
<b>U.S. West</b>	1,919	2.24%	20.26%
<b>U.S. East</b>	1,789	2.32%	20.40%
<b>All MMAs</b>	3,708	1.61%	20.22%

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

## METHODOLOGY – OVERALL (cont.)

Monthly samples of visitors who stayed for at least two days are drawn from completed the Domestic In-Flight database. Selected U.S. visitors were sent an email invitation with a link to complete the survey online.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight Survey. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data from both MMAs were reported as weighted data based on weights generated for 2021 data. The VSAT weighting system was developed to adjust for disproportionate sampling across all MMAs.

*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.*

# METHODOLOGY – Effect of COVID-19

## **COVID-19 Travel Restrictions**

In December 2019 and January 2020, the initial cases of novel coronavirus (2019-nCoV)-infected pneumonia (NCIP) occurred in Wuhan, Hubei Province, China. Concerns around the virus and related travel restrictions resulted in suspended flights to and from Canada, China, Japan, Korea and Oceania. Flights to Hawai'i from Japan and Canada resumed in November and December 2020, respectively, but they were very limited and resulted in an insufficient number of visitors to sample for the VSAT study. Therefore, visitors from those and other international MMAs did not participate in the VSAT survey for this quarter.

## **State of Hawai'i Safe Travels Program**

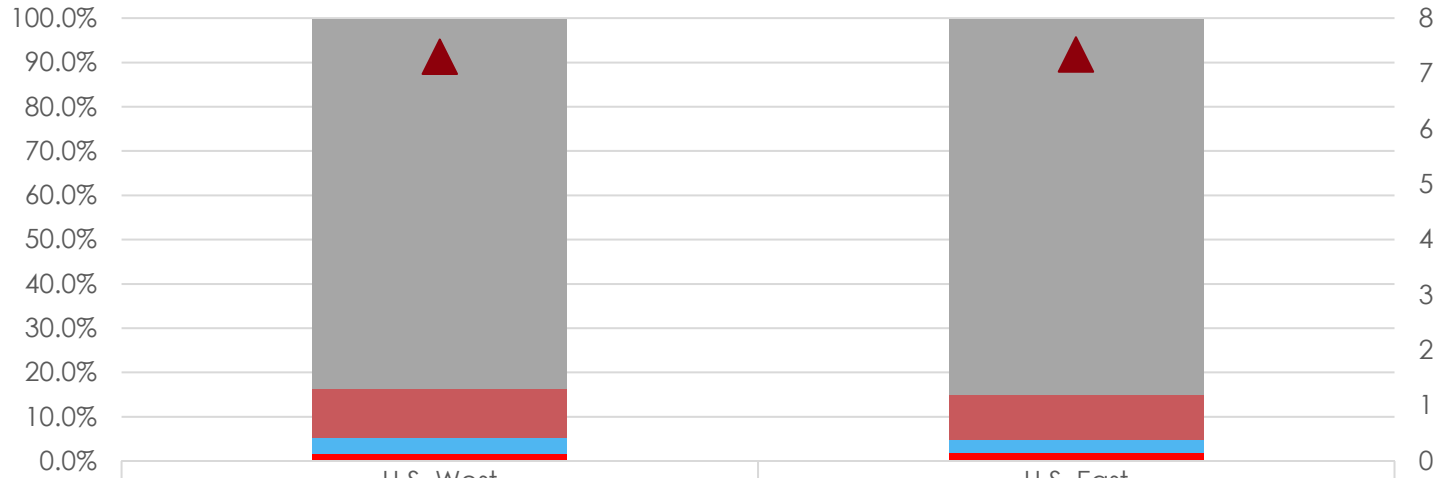
On March 26, 2020, the State of Hawai'i started requiring all visitors and returning residents to Hawai'i to complete a mandatory, 14-day quarantine. Then on October 15, 2020, the State of Hawaii Safe Travels program began, which allowed all visitors and returning residents to avoid quarantine by showing negative results of a COVID-19 test from a trusted testing partner taken no more than 72 hours prior to departing the final leg of their trip to Hawai'i. On December 4, the mandatory quarantine period for all those who did not

5 have a negative test result was reduced from 14 days to 10 days.

# SECTION 1 – VISITOR SATISFACTION

# SATISFACTION – STATE OF HAWAI‘I BY MMA

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



	U.S. West	U.S. East
■ Excellent (7-8)	83.5%	84.9%
■ Above Avg (5-6)	11.2%	10.2%
■ Below Avg (3-4)	3.6%	3.0%
■ Poor (1-2)	1.6%	1.8%
BASE	1,919	1,789
▲ MEAN	7.30	7.34

# SATISFACTION – STATE OF HAWAI'I BY MMA

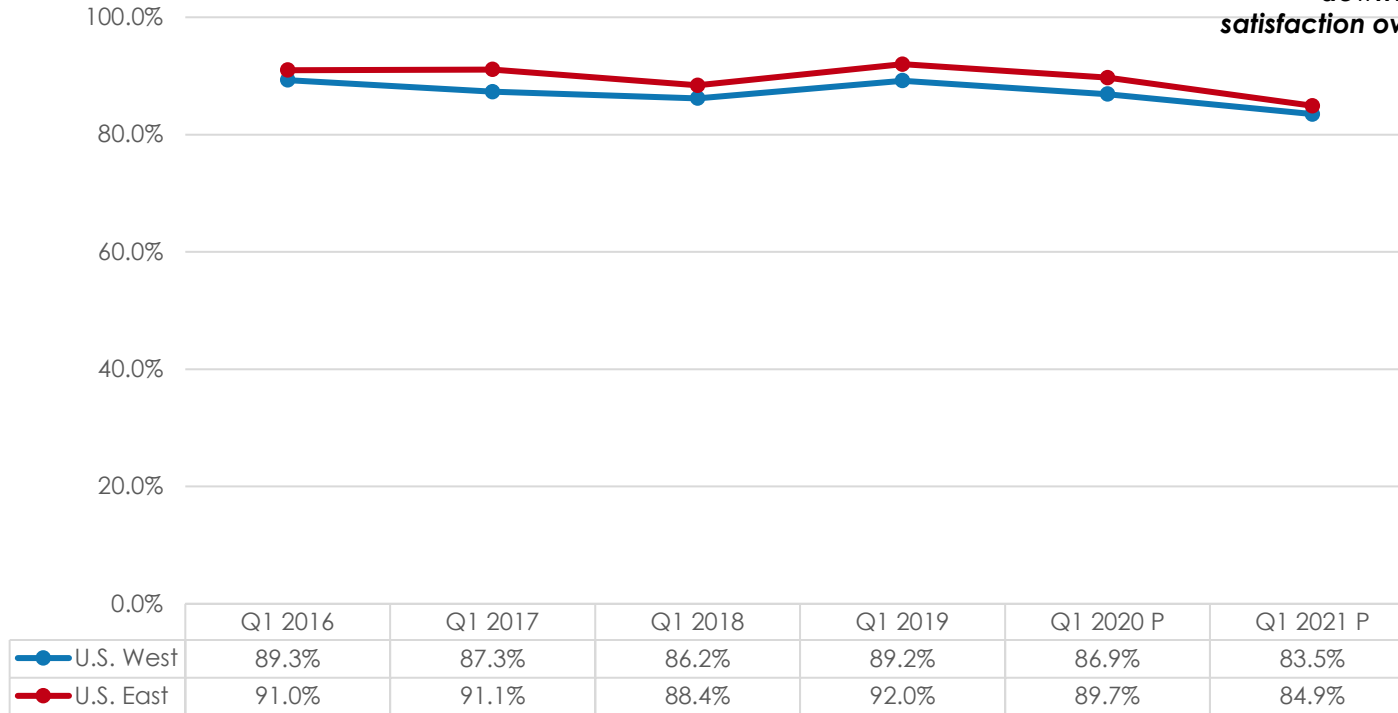
- **Household income:** Overall satisfaction with Hawai'i declined incrementally among more affluent travelers in both US West and US East visitor markets .
- **Age:** Satisfaction ratings were the highest among younger travelers in both U.S. West and U.S. East. Satisfaction decreased among older age groups in both visitor markets.
- **Gender:** Female travelers from both U.S. East and West gave higher satisfaction scores than male visitors.



# SATISFACTION – STATE OF HAWAI‘I BY MMA

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

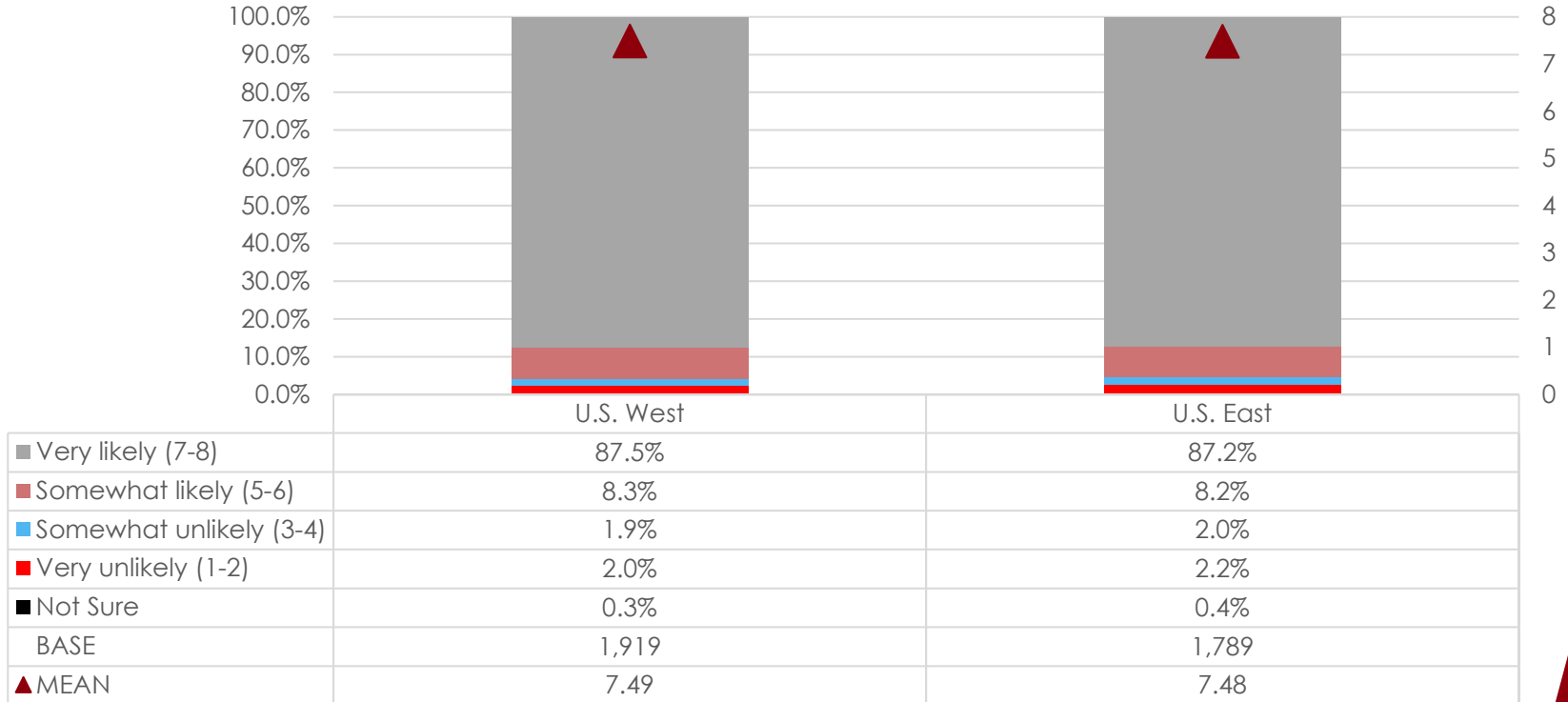
*Preliminary scores show a continued downward trend in satisfaction over the last two years.*



P= Preliminary Data

# BRAND/DESTINATION – ADVOCACY

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

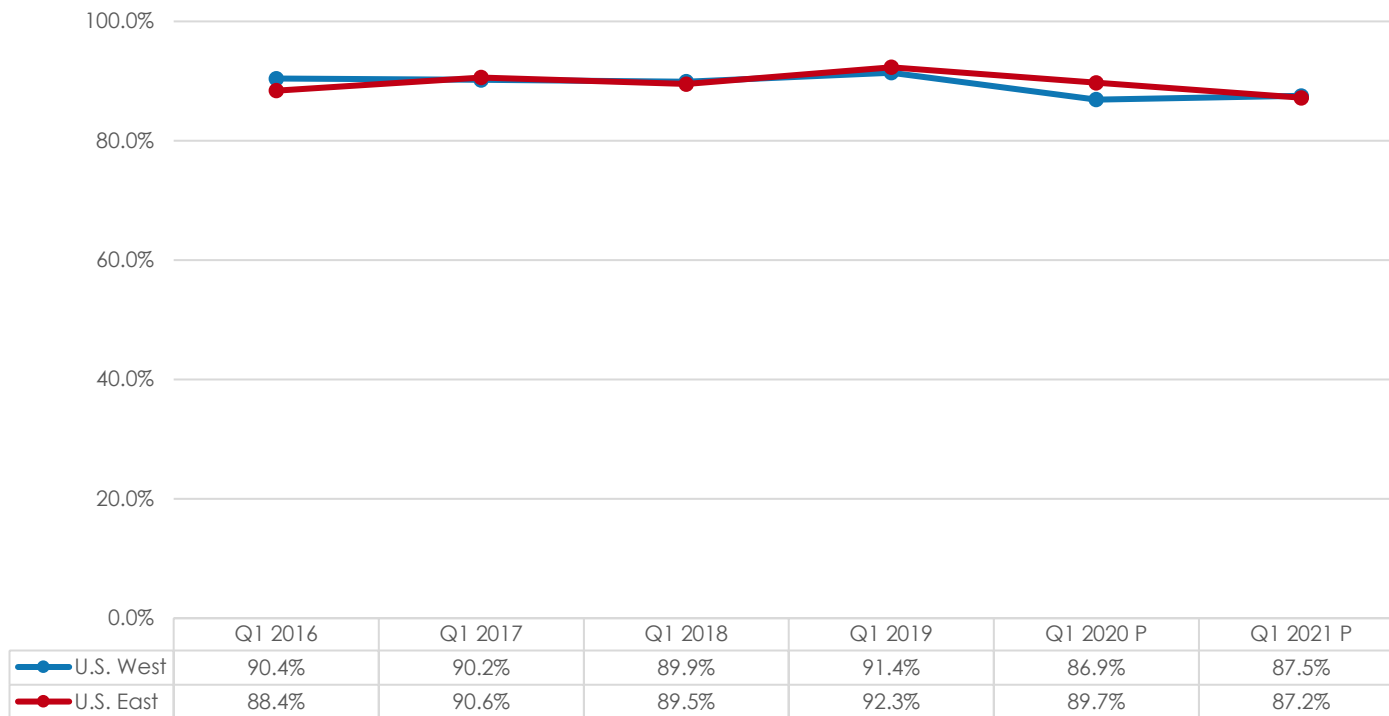


# BRAND/DESTINATION – ADVOCACY

- **Age:** Brand advocacy scores from U.S. East travelers declined incrementally among visitors in the older age groups.
- **Gender:** Female travelers from both U.S. West and U.S. East were more likely to recommend the state to others compared to male visitors.
- **Islands visited:** U.S. West travelers those whose trip consisted of visit to a single island were more likely to recommend the state compared to those who visited multiple islands.

# BRAND/DESTINATION – ADVOCACY

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



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



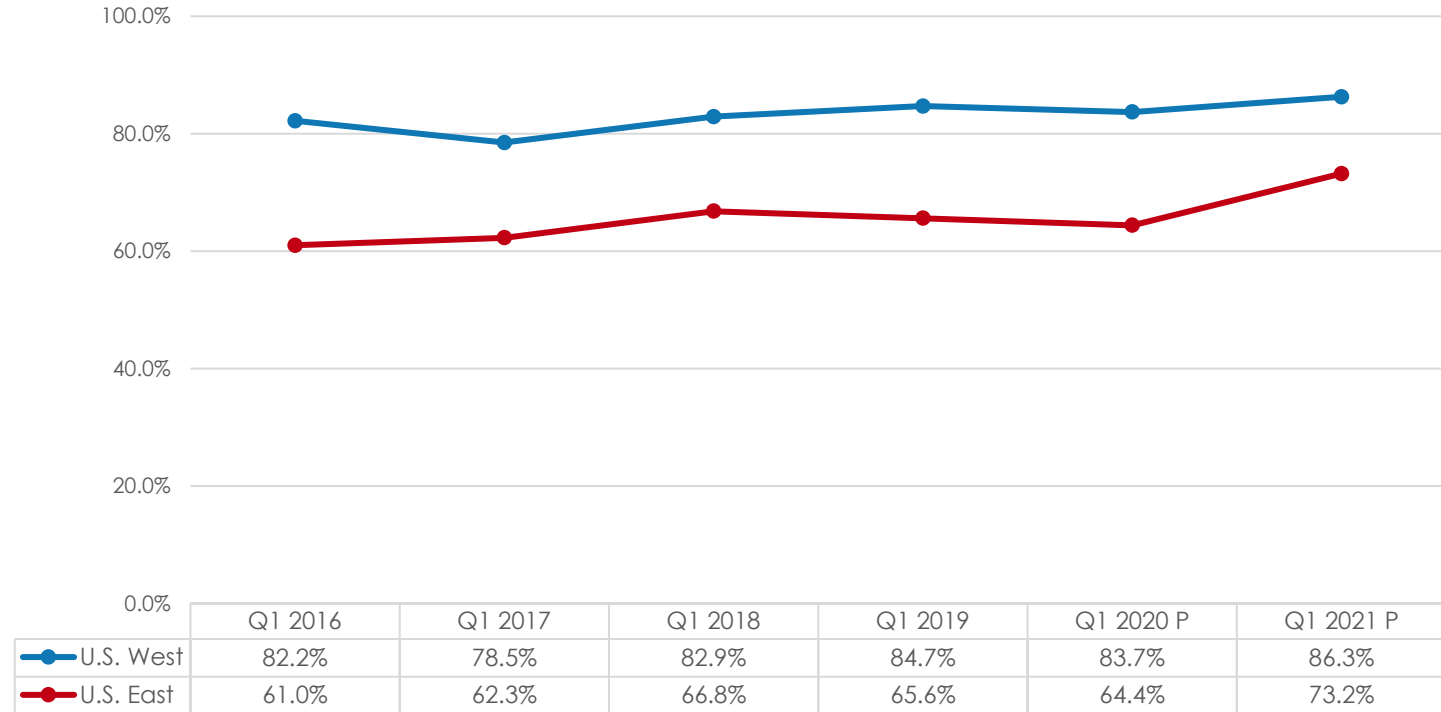
	U.S. West	U.S. East
■ Very likely (7-8)	86.3%	73.2%
■ Somewhat likely (5-6)	9.7%	17.7%
■ Somewhat unlikely (3-4)	1.6%	4.1%
■ Very unlikely (1-2)	1.8%	3.5%
■ Not Sure	0.5%	1.4%
BASE	1,919	1,789
▲ MEAN	7.49	7.05

# LIKELIHOOD OF RETURN VISIT

- **Repeat vs First-time:** Repeat visitors from both U.S. markets express a stronger likelihood of returning to the islands in the next five years compared to first-time visitors.
- **Islands visited:** Those whose trip consisted of visiting a single island expressed a stronger possibility of return compared to those who visited multiple islands during their stay. This was true in both U.S. West and U.S East visitor markets.

# LIKELIHOOD OF RETURN VISIT

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



P= Preliminary Data

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

Q1 2020 P	Q1 2021 P
42.5% Too expensive	30.9% COVID-19
28.7% Too crowded/ congested/ traffic	28.7% Too expensive
27.7% Want to go someplace new	26.6% Unfriendly people/ felt unwelcome
26.0% Poor value	24.7% Want to go someplace new
21.3% Flight too long	17.5% Poor value
20.4% Too commercialized/ overdeveloped	10.7% No compelling reason to return
16.6% Five years is too soon to revisit	10.2% Too commercialized/ overdeveloped
13.9% No reason to return/ Nothing new	
11.1% Unfriendly people/ felt unwelcome	

P= Preliminary Data



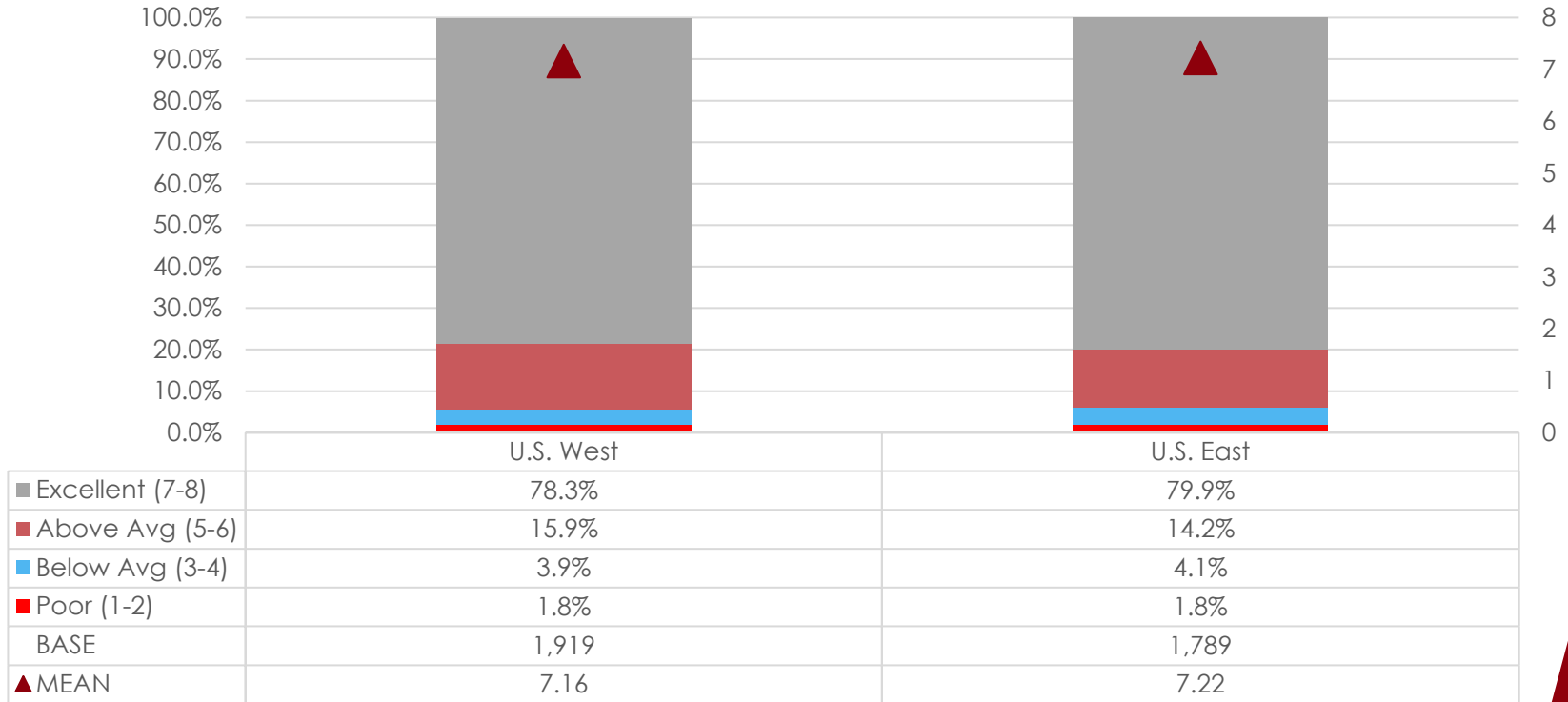
# UNLIKELY TO RETURN – TOP REASONS U.S. EAST

Q1 2020 P	Q1 2021 P
45.6% Want to go someplace new	38.0% Too expensive
44.7% Too expensive	24.8% Flight is too long
40.3% Flight too long	23.6% COVID-19
16.3% Other financial obligations	20.7% Want to go someplace new
16.2% Too crowded/ congested/ traffic	18.0% Poor value
15.2% Five years is too soon	17.8% Unfriendly people/ Felt unwelcome
14.2% Poor value	13.9% Poor service
11.0% Too commercialized/ overdeveloped	13.2% Other financial obligations
	10.4% Five years is too soon
	10.2% No compelling reason to return

P= Preliminary Data

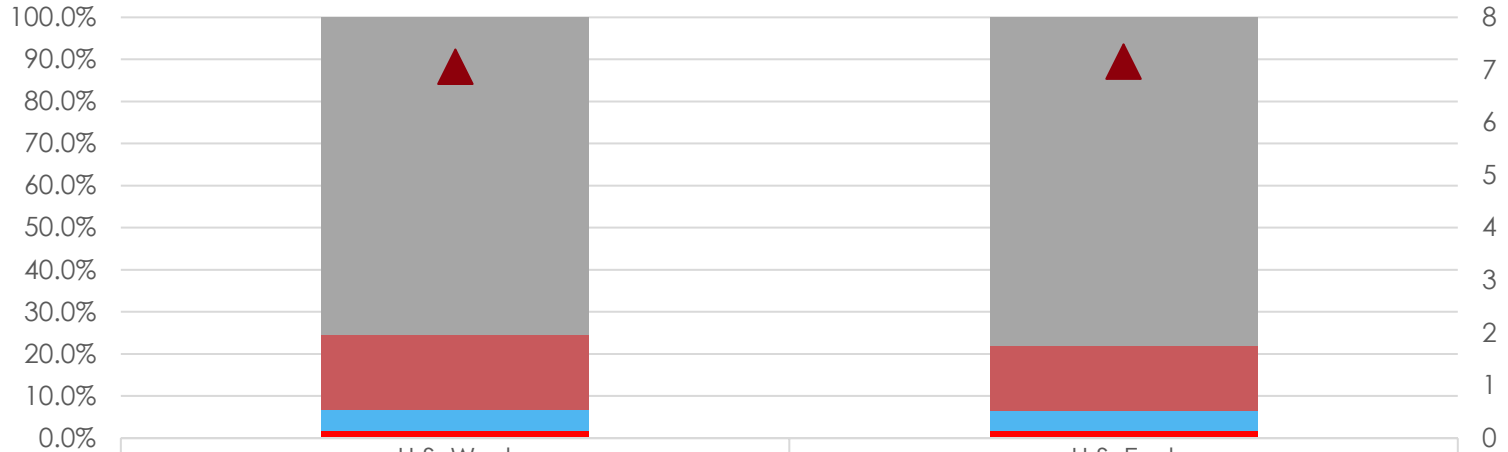
# OFFERING A VARIETY OF EXPERIENCES

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



# NUMBER OF DIFFERENT/UNIQUE EXPERIENCES

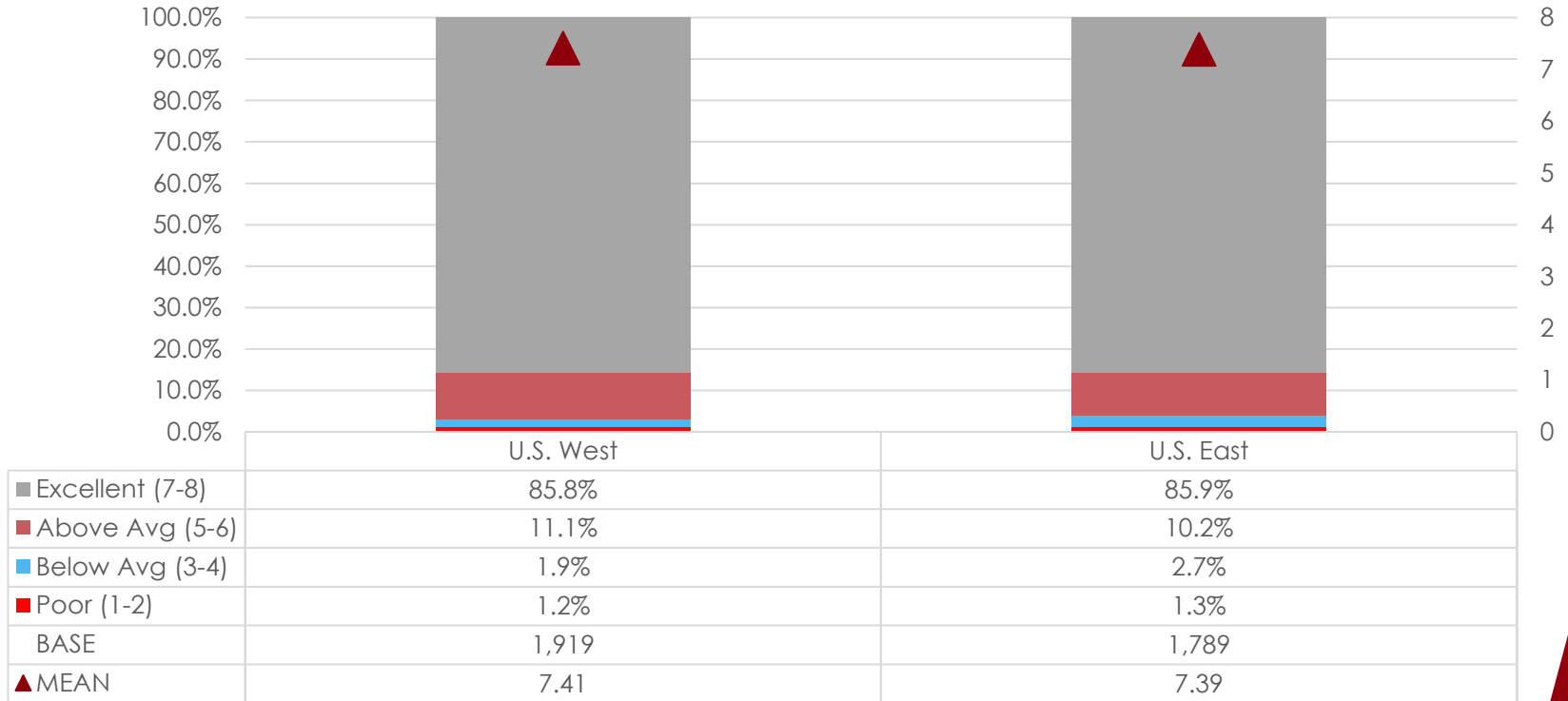
8-pt Rating Scale  
8=Excellent / 1=Poor



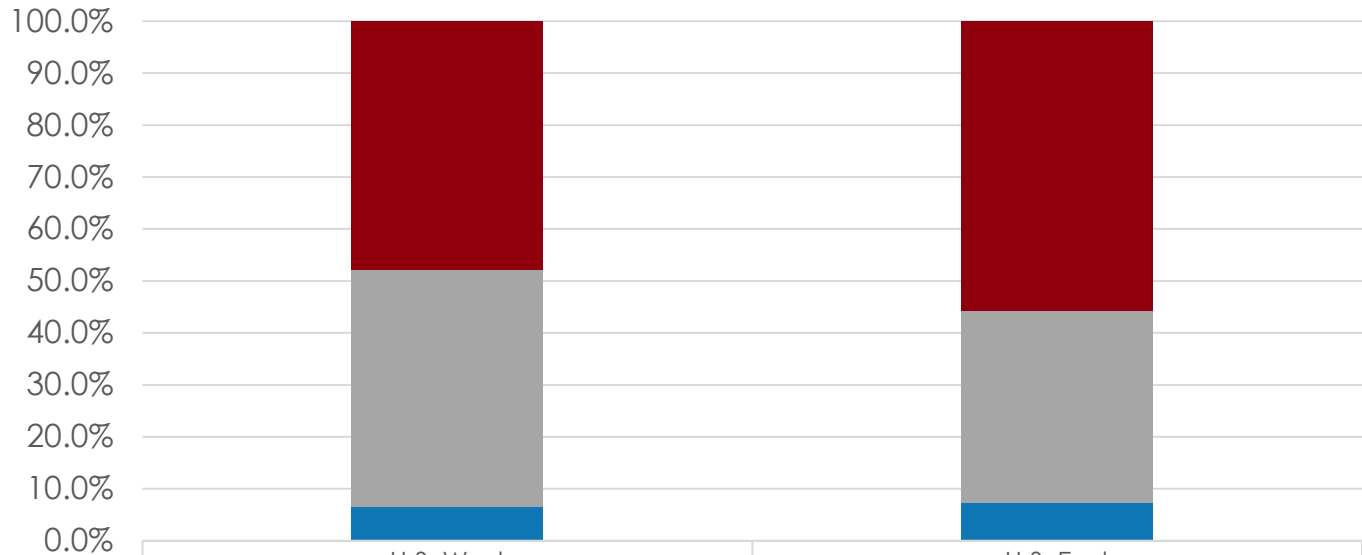
	U.S. West	U.S. East
■ Excellent (7-8)	75.5%	78.2%
■ Above Avg (5-6)	17.7%	15.4%
■ Below Avg (3-4)	5.0%	4.7%
■ Poor (1-2)	1.8%	1.7%
BASE	1,919	1,789
▲ MEAN	7.06	7.16

# BEING A SAFE AND SECURE DESTINATION

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



# SATISFACTION – HAWAI'I TRIP EXPECTATIONS



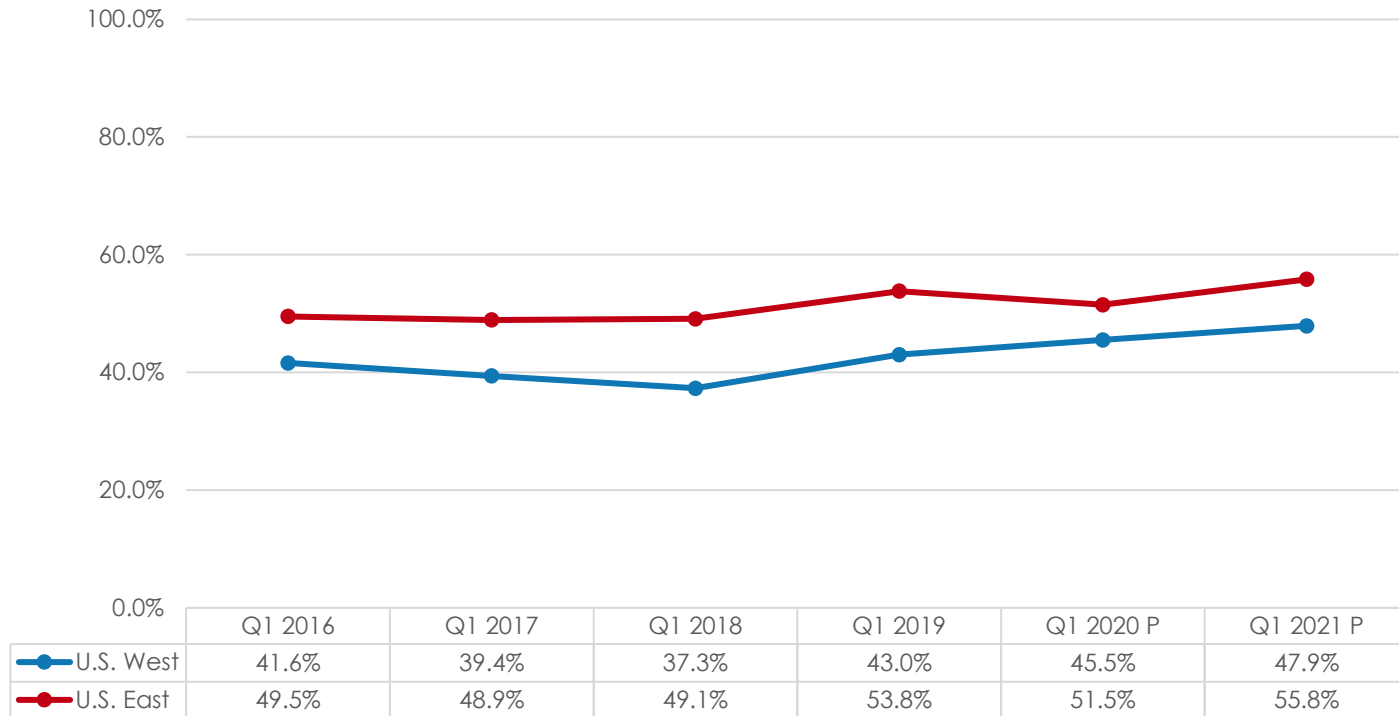
	U.S. West	U.S. East
Exceeded expectations	47.9%	55.8%
Met expectations	45.5%	36.9%
Did NOT meet expectations	6.6%	7.3%
BASE	1,919	1,789

## SATISFACTION – HAWAI'I TRIP EXPECTATIONS

- **Age:** Among travelers from both U.S. West and U.S. East, more younger visitors felt that the trip exceeded their expectations. Ratings declined incrementally among the older age groups.
- **Gender:** Female travelers from U.S. West and U.S. East were more likely to agree that their trip exceeded their expectations than males from these visitor markets.
- **Islands visited:** Among U.S. West visitors, those who visited a single island were more likely to feel their trip exceeded their expectations, compared to those who visited multiple islands.
- **Trips to HI:** First-time visitors were more likely to feel their trip exceeded their expectations compared to repeat visitors from both U.S. East and U.S. West.
- **Household income:** Among U.S. East visitors, satisfaction in terms of trip expectations was highest among less affluent travelers compared to visitors who were more affluent.

# SATISFACTION – HAWAI'I TRIP EXPECTATIONS

## TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



P= Preliminary Data

# SECTION 2 – ACTIVITIES



## ACTIVITIES – SIGHTSEEING

	U.S. West	U.S. East
<b>TOTAL</b>	93.7%	95.6%
<b>On own (self guided)</b>	84.3%	85.6%
<b>Helicopter/ airplane</b>	3.4%	5.3%
<b>Boat/ submarine/ whale</b>	29.9%	36.0%
<b>Visit towns/communities</b>	50.9%	54.2%
<b>Limo/ van/ bus tour</b>	3.1%	7.3%
<b>Scenic views/ natural landmark</b>	57.8%	68.0%
<b>Movie/ TV/ film location</b>	3.9%	6.1%

# ACTIVITIES – RECREATION

	U.S. West	U.S. East
<b>TOTAL</b>	97.3%	97.4%
<b>Beach/ sunbathing</b>	88.0%	89.4%
<b>Bodyboarding</b>	15.9%	10.5%
<b>Standup paddle board</b>	8.1%	6.3%
<b>Surfing</b>	9.3%	9.2%
<b>Canoeing/ kayak</b>	7.6%	7.7%
<b>Swim in the ocean</b>	71.7%	71.3%
<b>Snorkeling</b>	51.8%	46.3%
<b>Freediving</b>	2.2%	1.7%
<b>Windsurf/ Kitesurf</b>	0.4%	0.3%
<b>Jet ski/ Parasail</b>	1.1%	1.6%
<b>Scuba diving</b>	4.1%	3.8%
<b>Fishing</b>	3.7%	3.8%
<b>Golf</b>	10.0%	9.2%

## ACTIVITIES – RECREATION (continued)

	U.S. West	U.S. East
<b>TOTAL</b>	97.3%	97.4%
<b>Run/ Jog/ Fitness walk</b>	41.9%	37.2%
<b>Spa</b>	8.4%	8.7%
<b>Hiking</b>	50.0%	56.7%
<b>Backpack/ camp</b>	1.9%	2.4%
<b>Agritourism</b>	9.2%	13.8%
<b>Sport event/ tournament</b>	0.5%	0.2%
<b>Park/ botanical garden</b>	30.6%	41.1%
<b>Waterpark</b>	0.7%	1.1%
<b>Mountain tube/ waterfall rappel</b>	0.4%	0.5%
<b>Zip lining</b>	4.0%	4.0%
<b>Skydiving</b>	0.4%	0.7%
<b>All terrain vehicle (ATV)</b>	3.6%	5.4%
<b>Horseback riding</b>	2.2%	2.6%

# ACTIVITIES – ENTERTAINMENT & DINING

	U.S. West	U.S. East
<b>TOTAL</b>	98.8%	98.9%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	18.7%	23.0%
<b>Live music/ stage show</b>	17.1%	24.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	5.3%	6.0%
<b>Fine dining</b>	50.7%	52.8%
<b>Family restaurant</b>	58.3%	56.1%
<b>Fast food</b>	35.2%	42.0%
<b>Food truck</b>	38.7%	42.5%
<b>Café/ coffee house</b>	45.0%	47.5%
<b>Ethnic dining</b>	27.0%	32.3%
<b>Prepared own meal</b>	65.6%	57.4%

# ACTIVITIES – SHOPPING

	U.S. West	U.S. East
<b>TOTAL</b>	96.0%	96.3%
<b>Mall/ department store</b>	36.6%	37.6%
<b>Designer boutique</b>	16.4%	16.9%
<b>Hotel/ resort store</b>	28.3%	33.3%
<b>Swap meet/ flea market</b>	12.4%	14.9%
<b>Discount/ outlet store</b>	13.1%	14.5%
<b>Supermarket</b>	73.8%	67.7%
<b>Farmer's market</b>	35.3%	35.3%
<b>Convenience store</b>	48.5%	51.2%
<b>Duty free store</b>	1.8%	2.0%
<b>Local shop/ artisan</b>	61.0%	63.3%

# ACTIVITIES – HISTORY, CULTURE, FINE ARTS

	U.S. West	U.S. East
<b>TOTAL</b>	54.1%	65.4%
<b>Historic military site</b>	15.1%	25.1%
<b>Historic Hawaiian site</b>	25.2%	30.6%
<b>Other historical site</b>	11.0%	12.4%
<b>Art museums</b>	1.8%	2.3%
<b>Art gallery/ exhibition</b>	8.8%	9.1%
<b>Luau/ Polynesian show/ hula show</b>	14.2%	22.7%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	2.1%	3.1%
<b>Play/ concert/ theatre</b>	0.8%	1.3%
<b>Art/ craft fair</b>	7.9%	7.5%
<b>Festival event</b>	2.7%	2.3%

## ACTIVITIES – TRANSPORTATION

	U.S. West	U.S. East
<b>TOTAL</b>	90.2%	90.6%
<b>Airport shuttle</b>	12.9%	13.0%
<b>Trolley</b>	1.0%	1.2%
<b>Public bus</b>	2.9%	5.1%
<b>Tour bus/ tour van</b>	2.1%	5.0%
<b>Taxi/ limo</b>	7.8%	10.3%
<b>Rental car</b>	79.9%	79.1%
<b>Ride share</b>	13.3%	18.0%
<b>Bicycle rental</b>	3.2%	4.2%

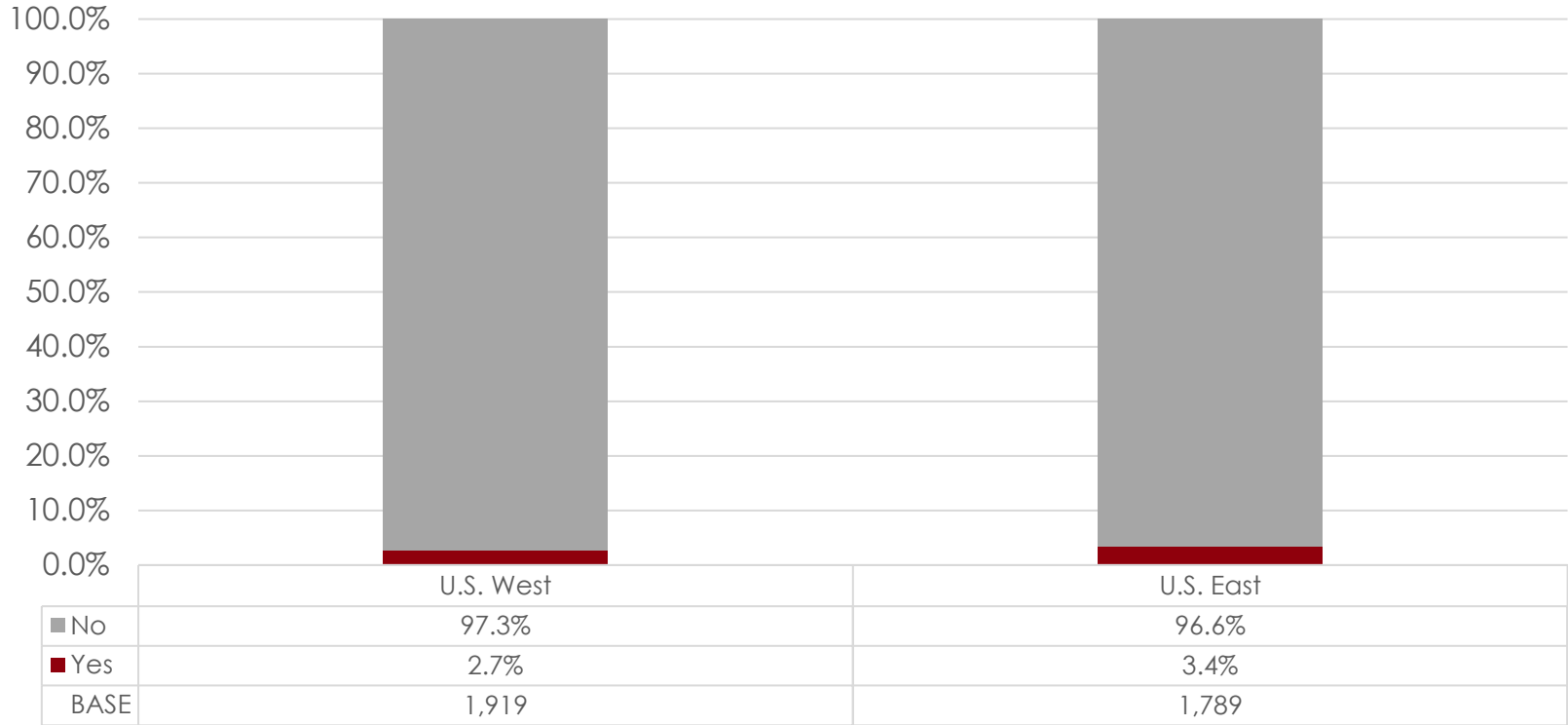
## ACTIVITIES – OTHER

	U.S. West	U.S. East
<b>TOTAL</b>	35.3%	33.0%
<b>Visit friends/ family</b>	34.2%	32.0%
<b>Volunteer non profit</b>	1.9%	2.0%



# SECTION 3 – TRAVELERS WITH DISABILITIES

# DISABLED TRAVELER – REQUIRED ASSISTANCE

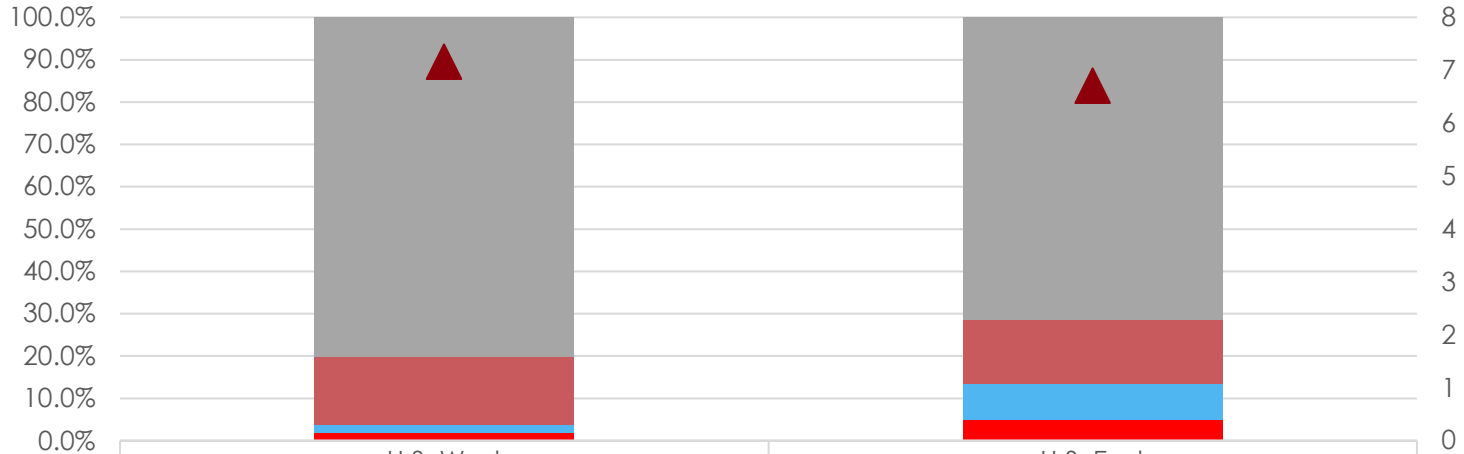


# DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East
Mobility aid (wheelchair, scooter, crutches, cane, etc)	63.8%	81.7%
Personal assistance	29.3%	16.3%
Other	10.3%	1.8%
NA No one needed assistance	8.4%	5.1%
Ambulance/ Hospital/ Medical visit	4.2%	1.6%
Lift equipped van	1.9%	1.8%
Respiratory equipment	1.9%	0.0%
ASL Interpreter/ texting/ captioning	1.9%	0.0%
Orientation and Mobility Assistance	0.0%	3.1%
<b>BASE</b>	51	61

# OVERALL ACCESSIBILITY – AIRPORTS

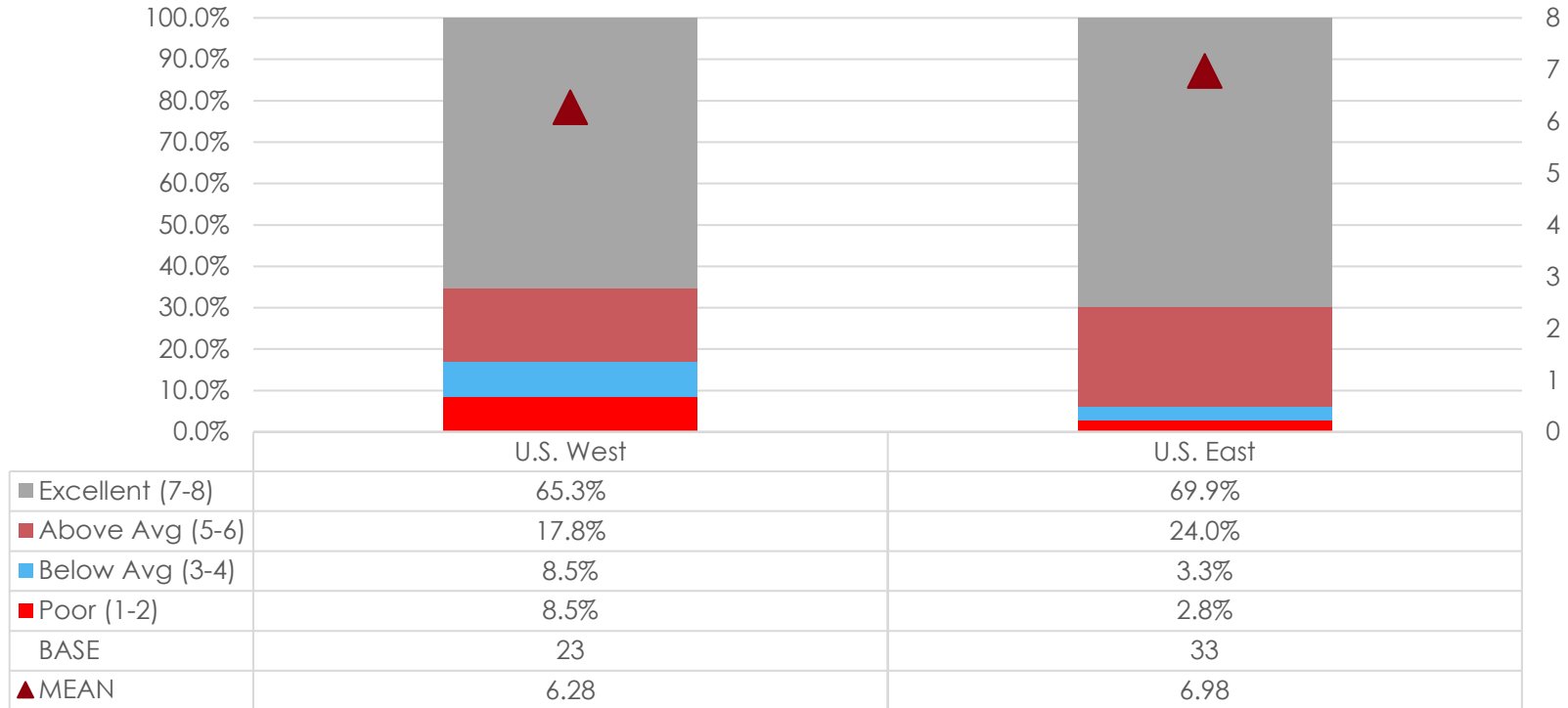
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	80.2%	71.5%
■ Above Avg (5-6)	16.0%	14.9%
■ Below Avg (3-4)	1.9%	8.6%
■ Poor (1-2)	1.9%	5.0%
BASE	51	60
▲ MEAN	7.16	6.71

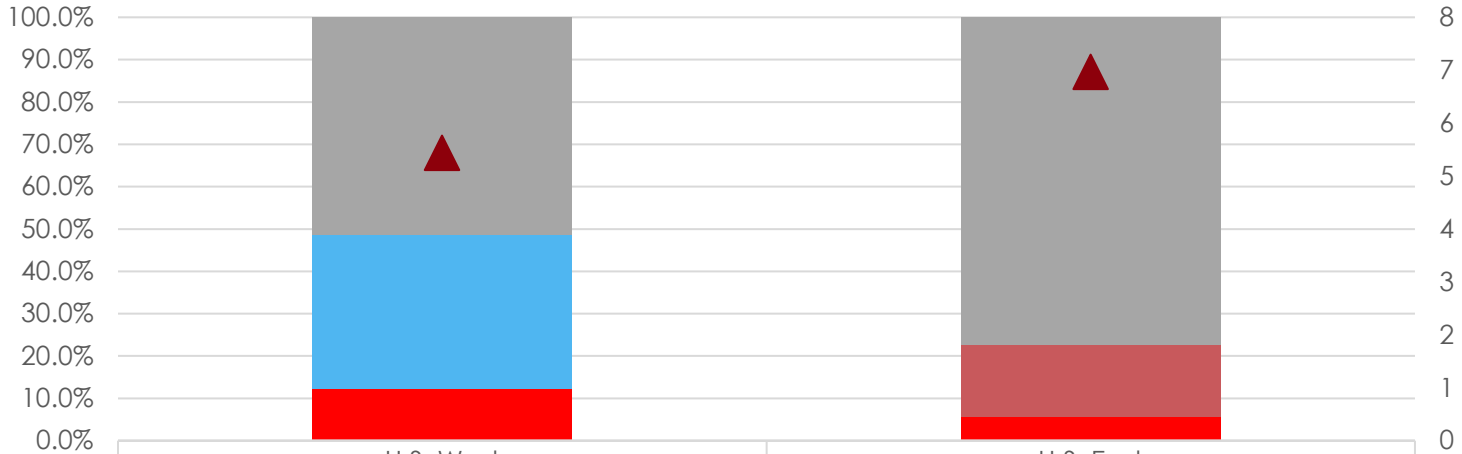
# OVERALL ACCESSIBILITY – PRIVATE TRANSPORTATION

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



# OVERALL ACCESSIBILITY – PUBLIC TRANSPORTATION

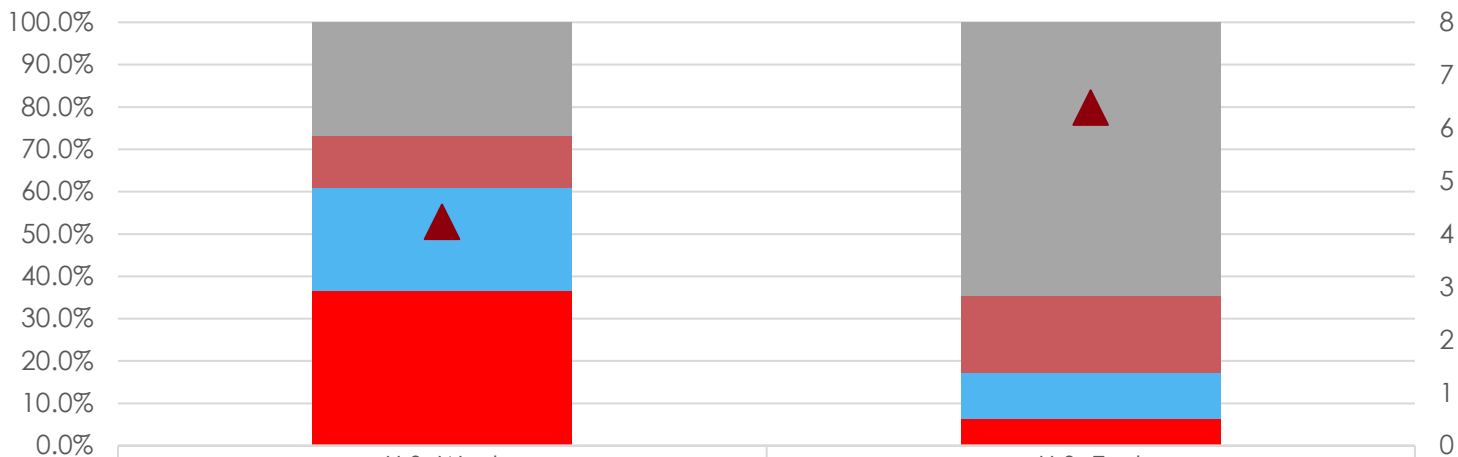
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	51.3%	77.4%
■ Above Avg (5-6)		16.9%
■ Below Avg (3-4)	36.5%	
■ Poor (1-2)	12.2%	5.6%
BASE	8	17
▲ MEAN	5.44	6.97

# OVERALL ACCESSIBILITY – RIDE SHARE

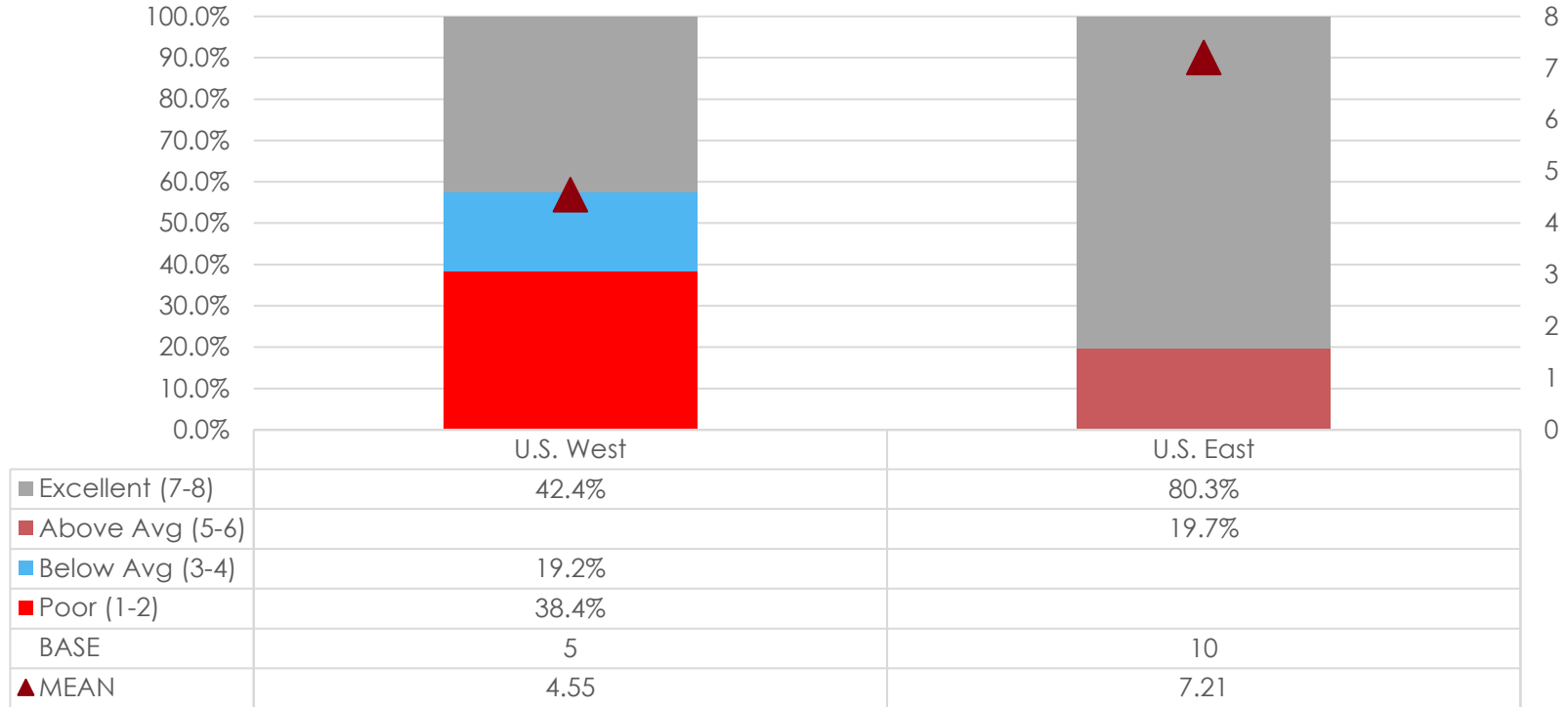
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	26.9%	64.6%
■ Above Avg (5-6)	12.2%	18.1%
■ Below Avg (3-4)	24.4%	11.0%
■ Poor (1-2)	36.5%	6.3%
BASE	8	17
▲ MEAN	4.23	6.39

# OVERALL ACCESSIBILITY – DEPT OF AG ANIMAL QUARANTINE

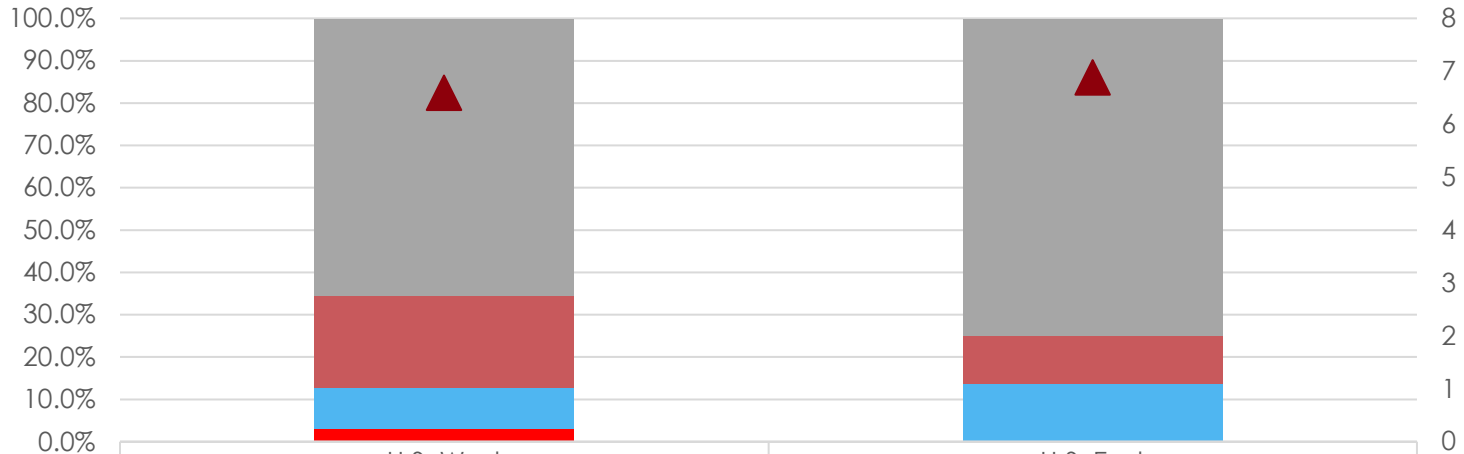
8-pt Rating Scale  
8=Excellent / 1=Poor





# OVERALL ACCESSIBILITY – HOTELS

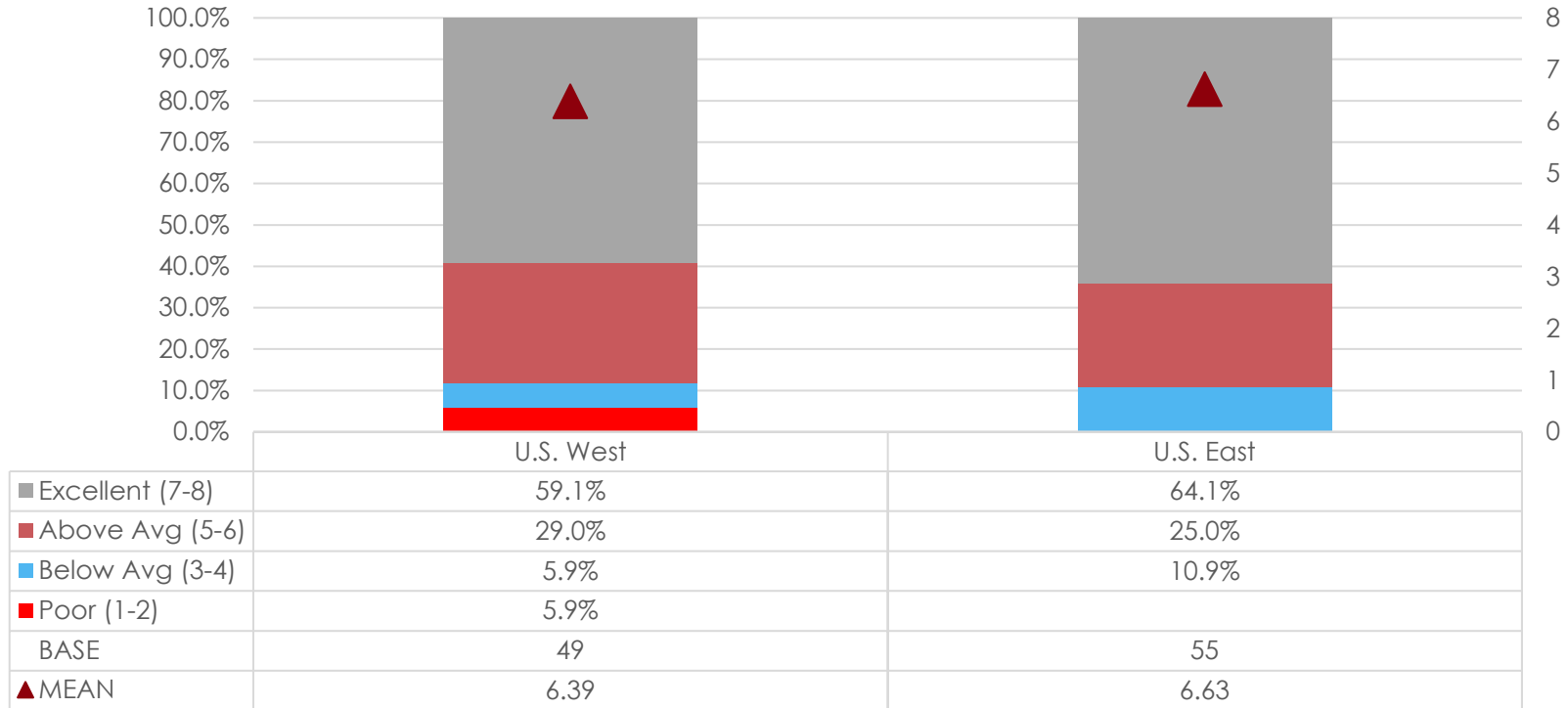
8-pt Rating Scale  
8=Excellent / 1=Poor



	U.S. West	U.S. East
■ Excellent (7-8)	65.4%	74.8%
■ Above Avg (5-6)	21.8%	11.6%
■ Below Avg (3-4)	9.7%	13.5%
■ Poor (1-2)	3.0%	
BASE	32	43
▲ MEAN	6.59	6.88

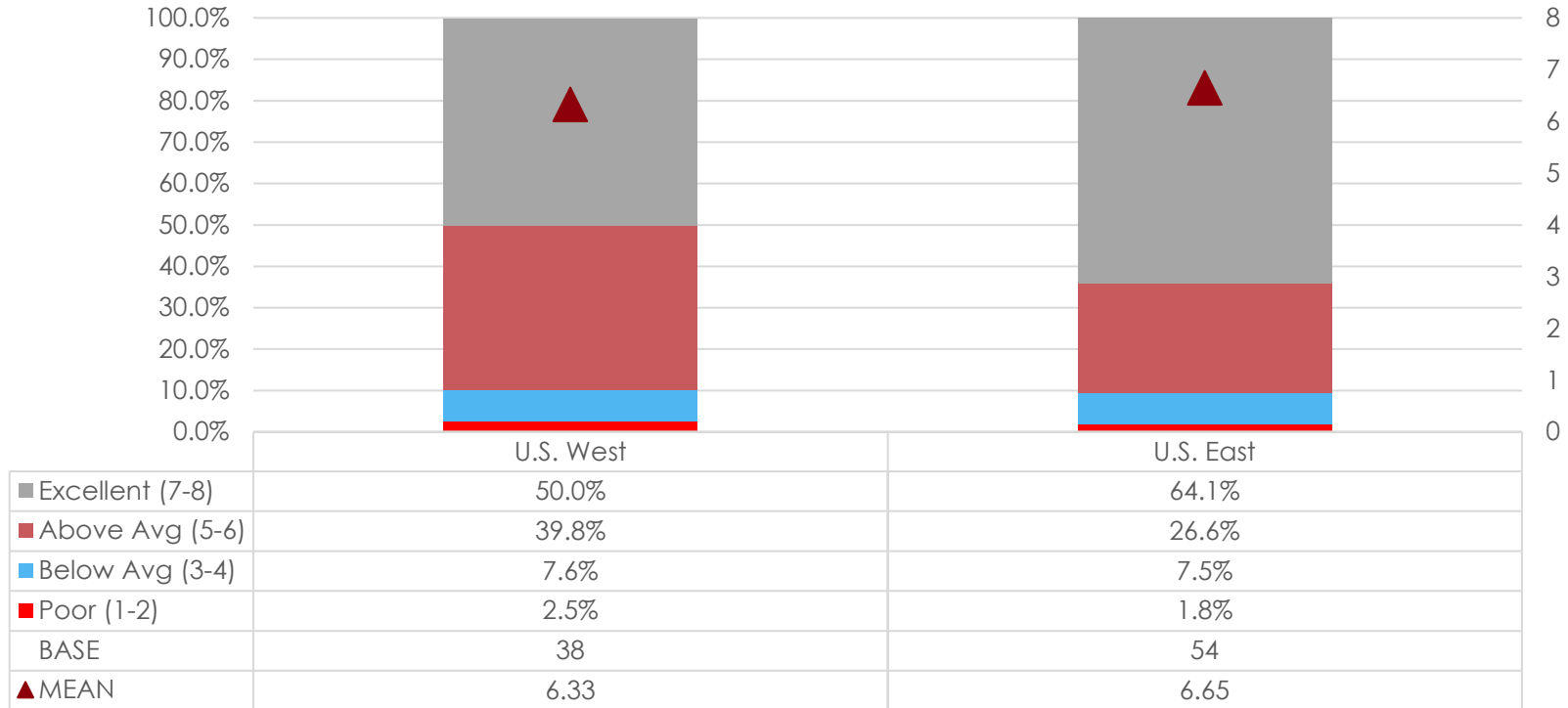
# OVERALL ACCESSIBILITY – RESTAURANTS

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



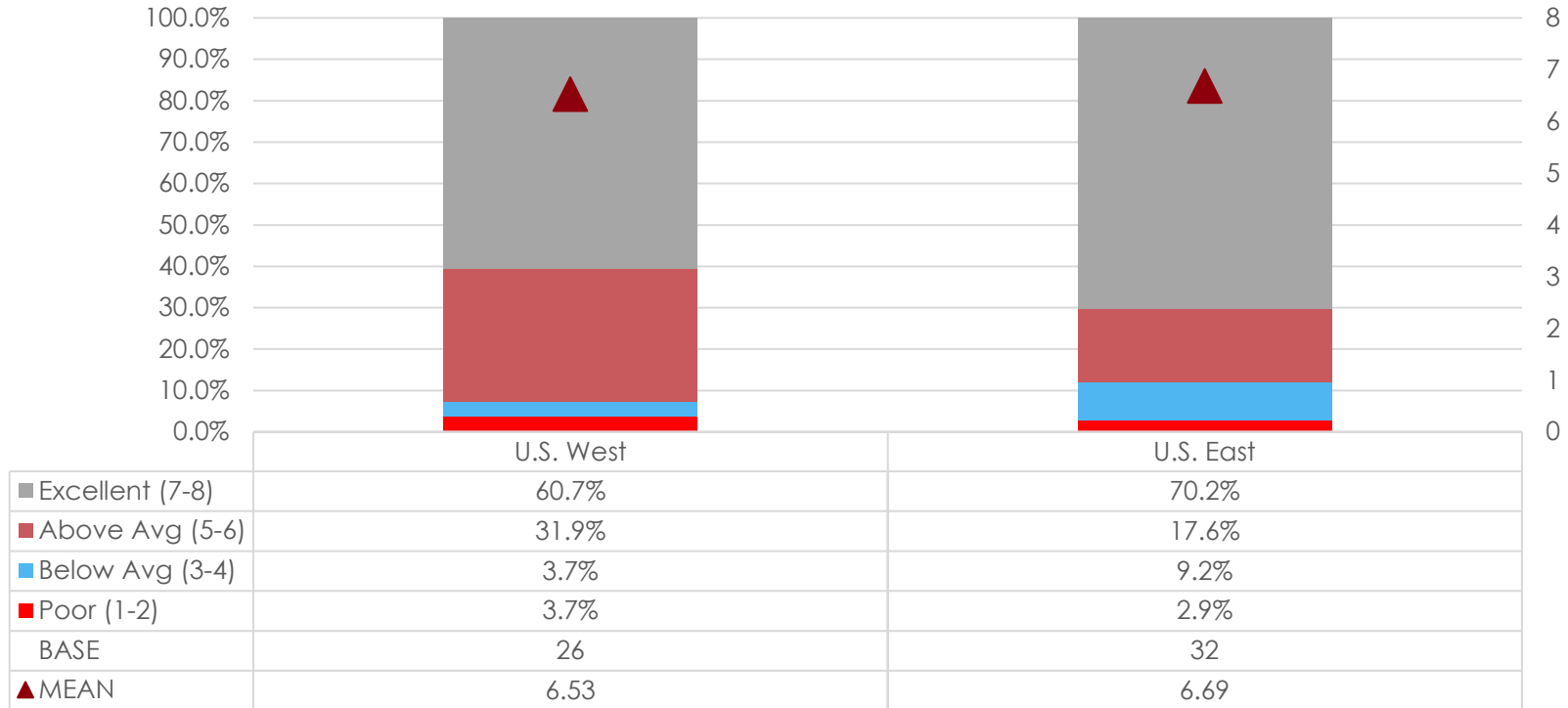
# OVERALL ACCESSIBILITY – PUBLIC ATTRACTIONS

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



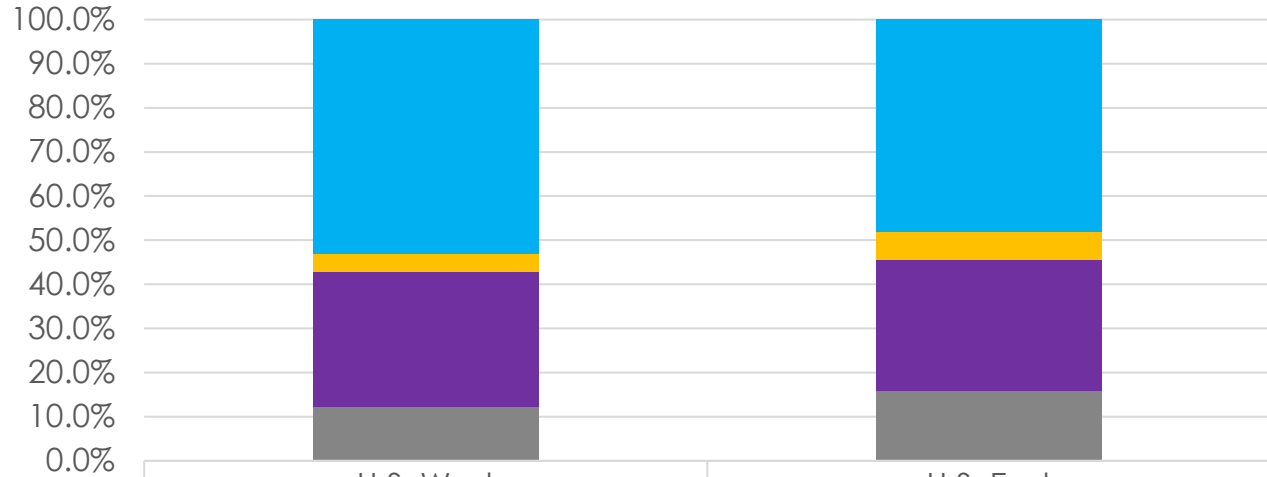
# OVERALL ACCESSIBILITY – PRIVATE ATTRACTIONS

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



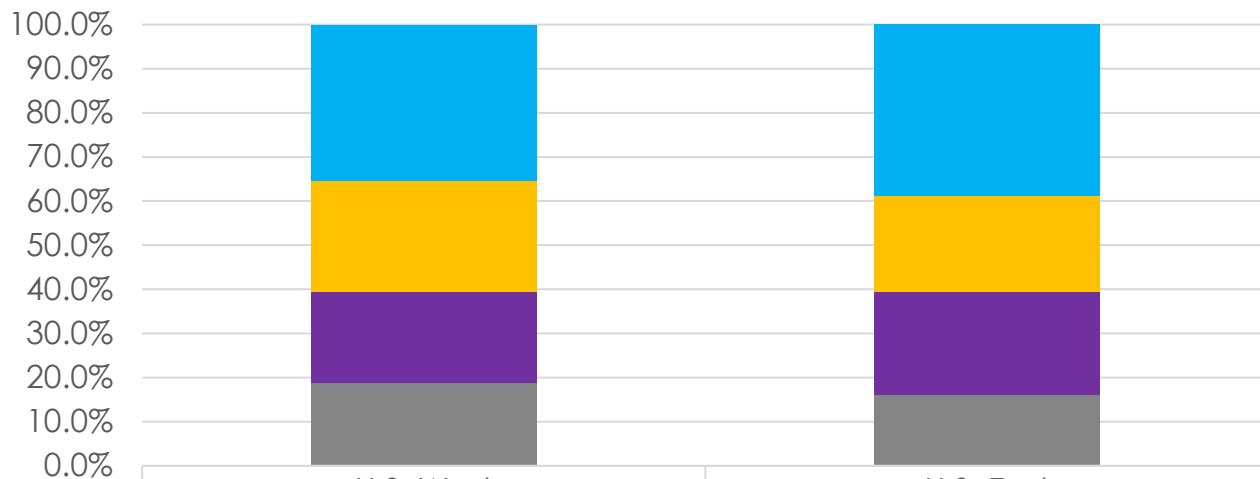
# SECTION 4 – ALTERNATIVE MESSAGING

# MESSAGING - SAFE AND RESPONSIBLE TRAVEL



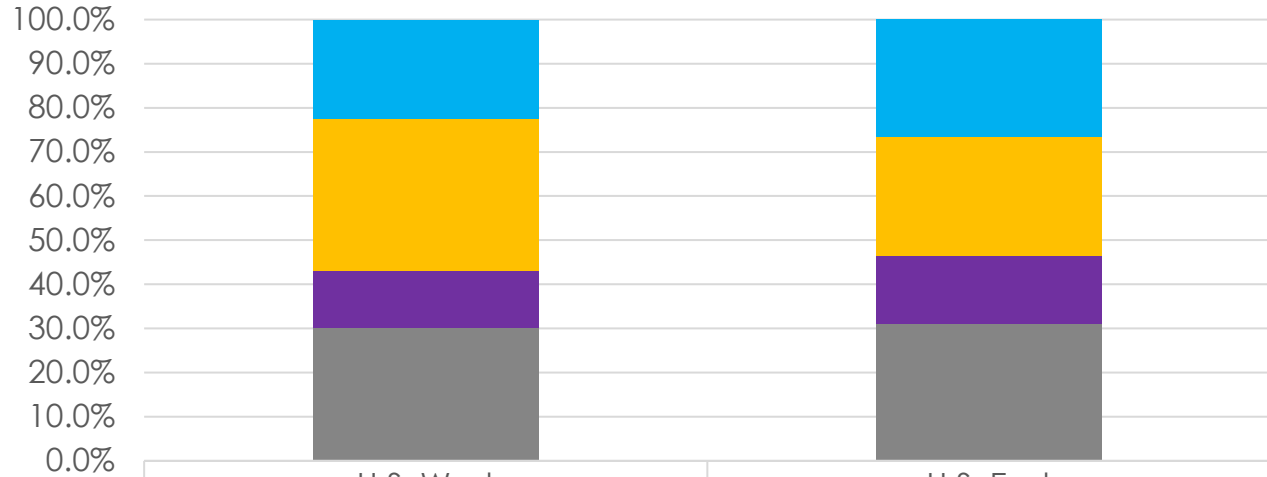
	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	53.2%	48.1%
■ YES- during trip	3.9%	6.2%
■ YES- Pre-arrival	30.6%	29.8%
■ NO	12.3%	15.9%
BASE	620	640

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



	U.S. West	U.S. East
YES- Pre-arrival/ During trip	35.3%	38.9%
YES- during trip	25.2%	21.7%
YES- Pre-arrival	20.6%	23.3%
NO	18.8%	16.1%
BASE	620	640

# MESSAGING – OCEAN AND HIKING SAFETY



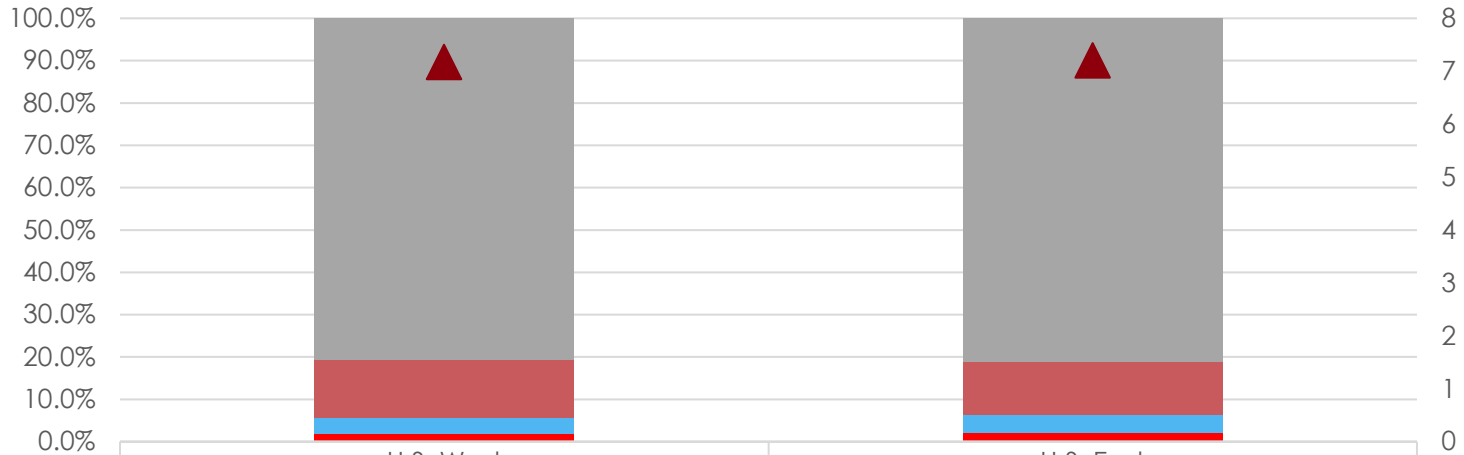
	U.S. West	U.S. East
■ YES- Pre-arrival/ During trip	22.4%	26.6%
■ YES- during trip	34.5%	26.8%
■ YES- Pre-arrival	13.0%	15.5%
■ NO	30.1%	31.1%
BASE	620	640



# SECTION 5 – O'AHU

# SATISFACTION – O‘AHU

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



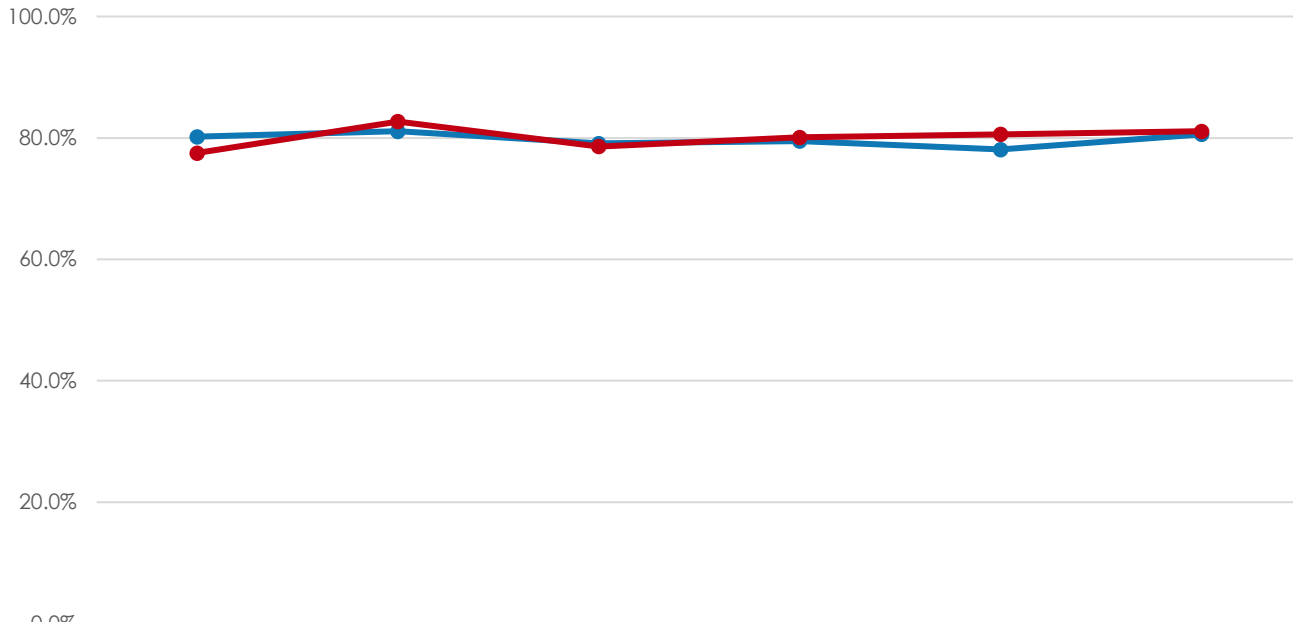
	U.S. West	U.S. East
■ Excellent (7-8)	80.6%	81.1%
■ Above Avg (5-6)	13.9%	12.6%
■ Below Avg (3-4)	3.6%	4.2%
■ Poor (1-2)	1.9%	2.1%
BASE	703	896
▲ MEAN	7.18	7.21

# SATISFACTION – O‘AHU

- **Age:** Younger travelers under the age of 50 from both U.S. West and U.S. East were the most satisfied with their stay on O‘ahu. At the opposite end, travelers over 50, particularly seniors provided the lowest scores.
- **Gender:** Female visitors from both U.S. West and U.S. East were more satisfied with their stay on O‘ahu than males from these visitor markets.
- **Household income:** Less affluent travelers from both U.S. markets gave higher satisfaction scores regarding their stay on O‘ahu. Satisfaction ratings decreased incrementally among more affluent travelers.
- **O‘ahu Only Visitors:** In both U.S. markets, those whose trip consisted of visiting just O‘ahu were more satisfied with their stay on island, compared to those whose trip also included visits to at least one Neighbor Island.

# SATISFACTION – O‘AHU

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

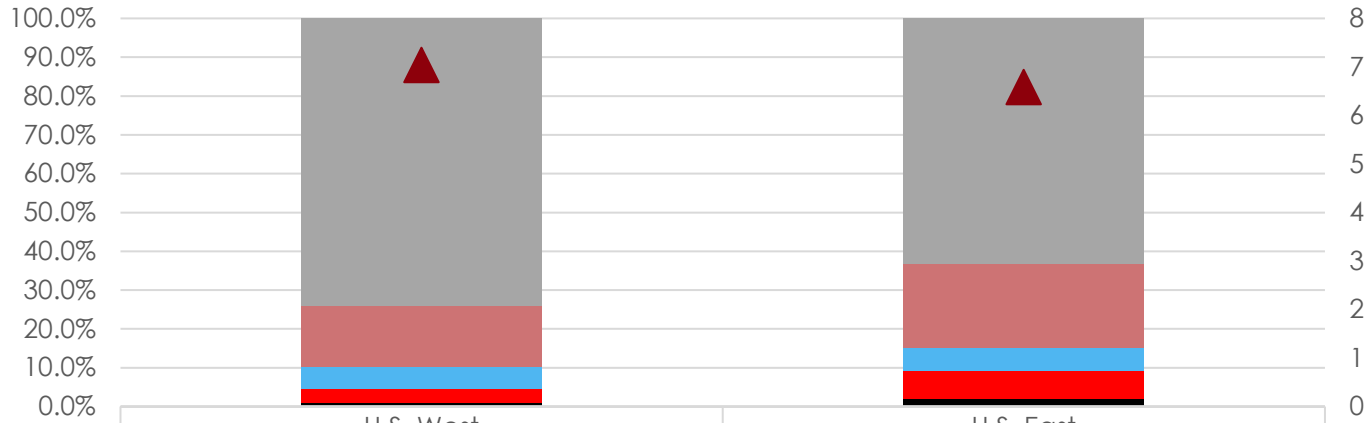


	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020 P	Q1 2021 P
U.S. West	80.2%	81.1%	79.1%	79.5%	78.1%	80.6%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.6%	81.1%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – O‘AHU

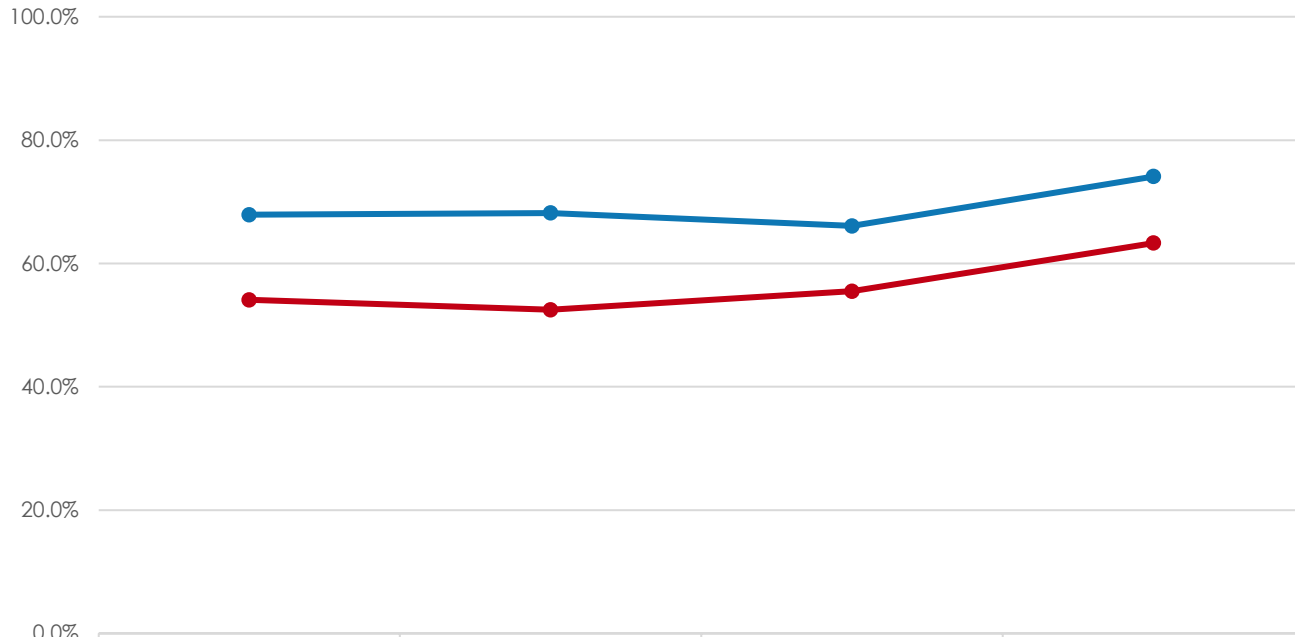
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
Very likely (7-8)	74.1%	63.3%
Somewhat likely (5-6)	15.7%	21.5%
Somewhat unlikely (3-4)	5.5%	5.9%
Very unlikely (1-2)	3.6%	7.4%
Not sure	1.1%	1.9%
BASE	656	816
▲ MEAN	7.04	6.58

# LIKELIHOOD OF RETURN VISIT – O‘AHU

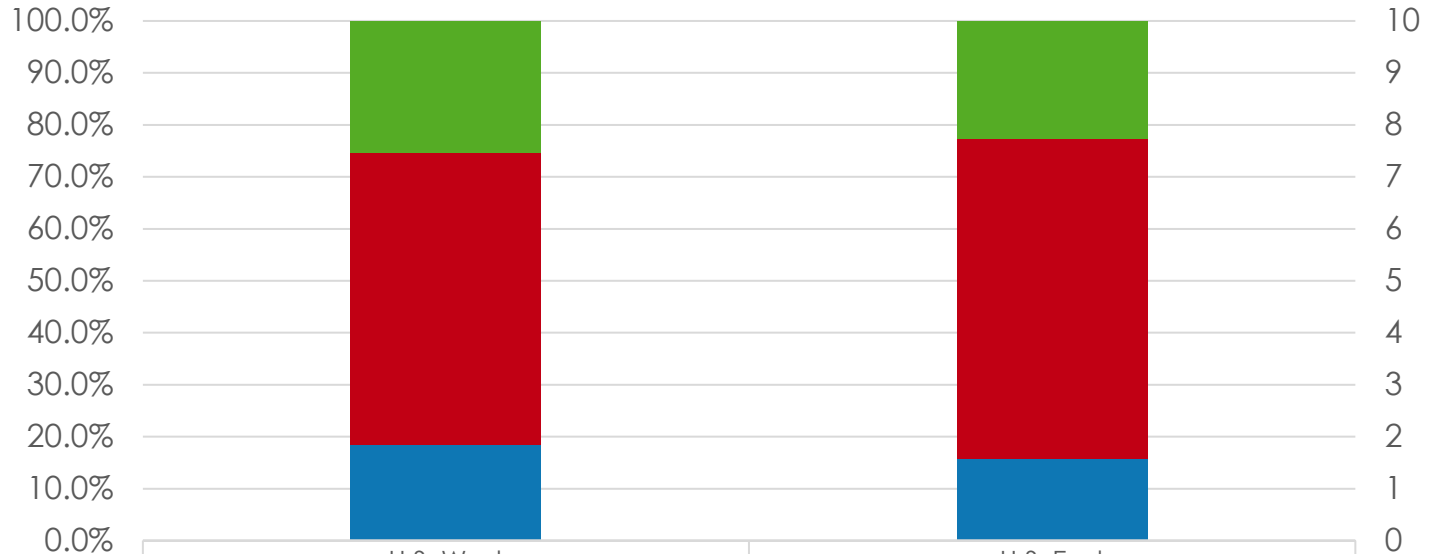
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020 P	Q1 2021 P
U.S. West	67.9%	68.2%	66.1%	74.1%
U.S. East	54.1%	52.5%	55.5%	63.3%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS – O‘AHU



	U.S. West	U.S. East
Aided Ad Awareness	25.4%	22.6%
No Prior Awareness	56.2%	61.7%
Unsure	18.4%	15.7%
BASE	656	816

# ATTRACTIONS – O‘AHU

	U.S. West	U.S. East
<b>Atlantis Submarine &amp; Cruises</b>	0.3%	0.9%
<b>Bernice P. Bishop Museum</b>	3.7%	4.1%
<b>Byodo In Temple</b>	9.5%	11.5%
<b>Chinatown &amp; Honolulu Art District</b>	11.3%	13.0%
<b>Diamond Head State Monument</b>	29.5%	39.6%
<b>Dole Plantation</b>	29.5%	31.3%
<b>Haleiwa</b>	31.1%	29.8%
<b>Hanauma Bay Nature Reserve</b>	14.6%	18.3%
<b>Harold L. Lyon Arboretum</b>	0.5%	0.6%
<b>Hawai‘i State Art Museum</b>	0.9%	0.5%
<b>Honolulu Museum of Art</b>	1.2%	1.5%
<b>Hawaiian Mission Houses, Historic Site and Archive</b>	0.6%	0.8%
<b>Hawai‘i’s Plantation Village</b>	1.1%	1.3%
<b>Honolulu Zoo</b>	5.3%	8.1%



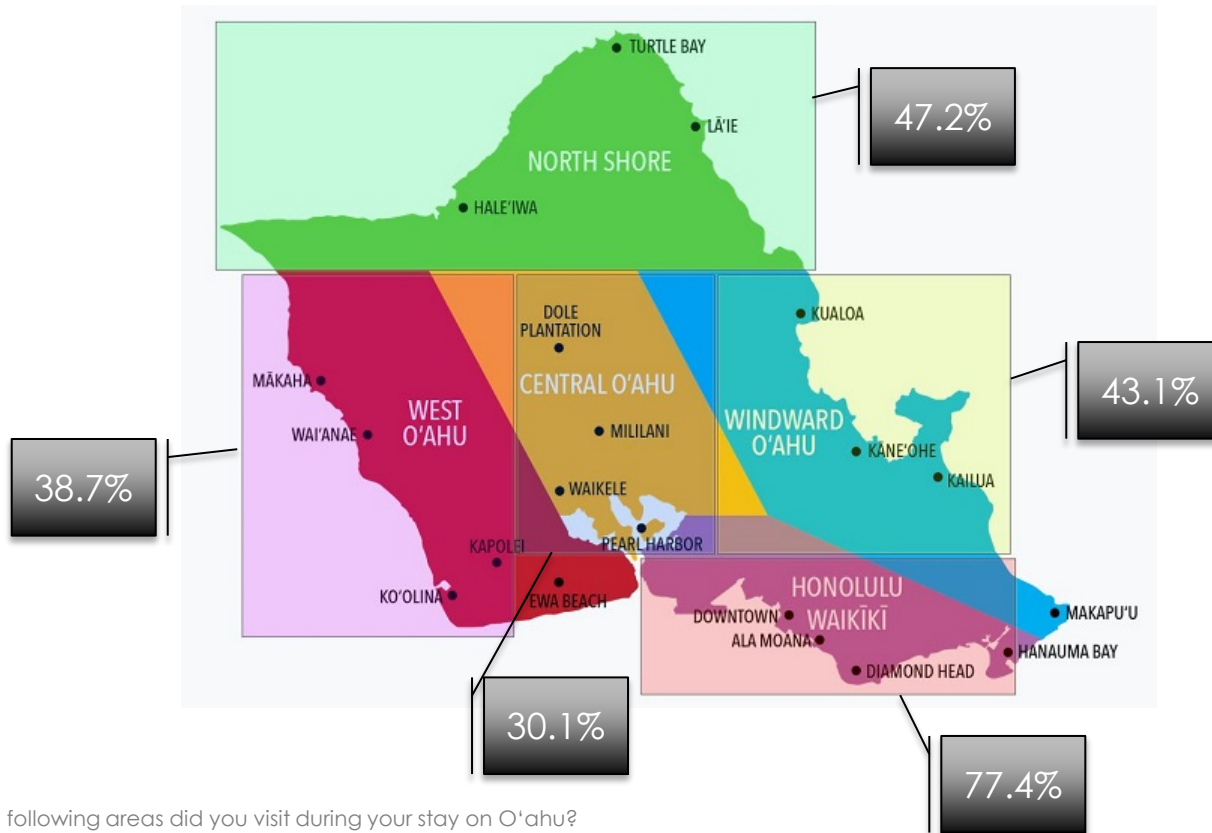
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Ho‘omaluhia Botanical Garden</b>	6.8%	9.1%
<b>Iolani Palace State Monument</b>	3.5%	6.1%
<b>Kaiwi State Scenic Shoreline/ Makapuu Trail</b>	5.6%	13.0%
<b>Kakaako Street Art</b>	3.4%	1.4%
<b>Koko Head Crater Trail</b>	12.6%	14.6%
<b>Kualoa Private Nature Reserve</b>	14.7%	16.6%
<b>Lanikai or Kailua Beach</b>	37.2%	42.5%
<b>Manoa Falls &amp; Trail</b>	7.5%	7.7%
<b>National Memorial Cemetery of the Pacific</b>	4.9%	9.4%
<b>Nuuanu Pali Lookout</b>	13.1%	16.9%
<b>North Shore Beaches</b>	54.2%	60.1%

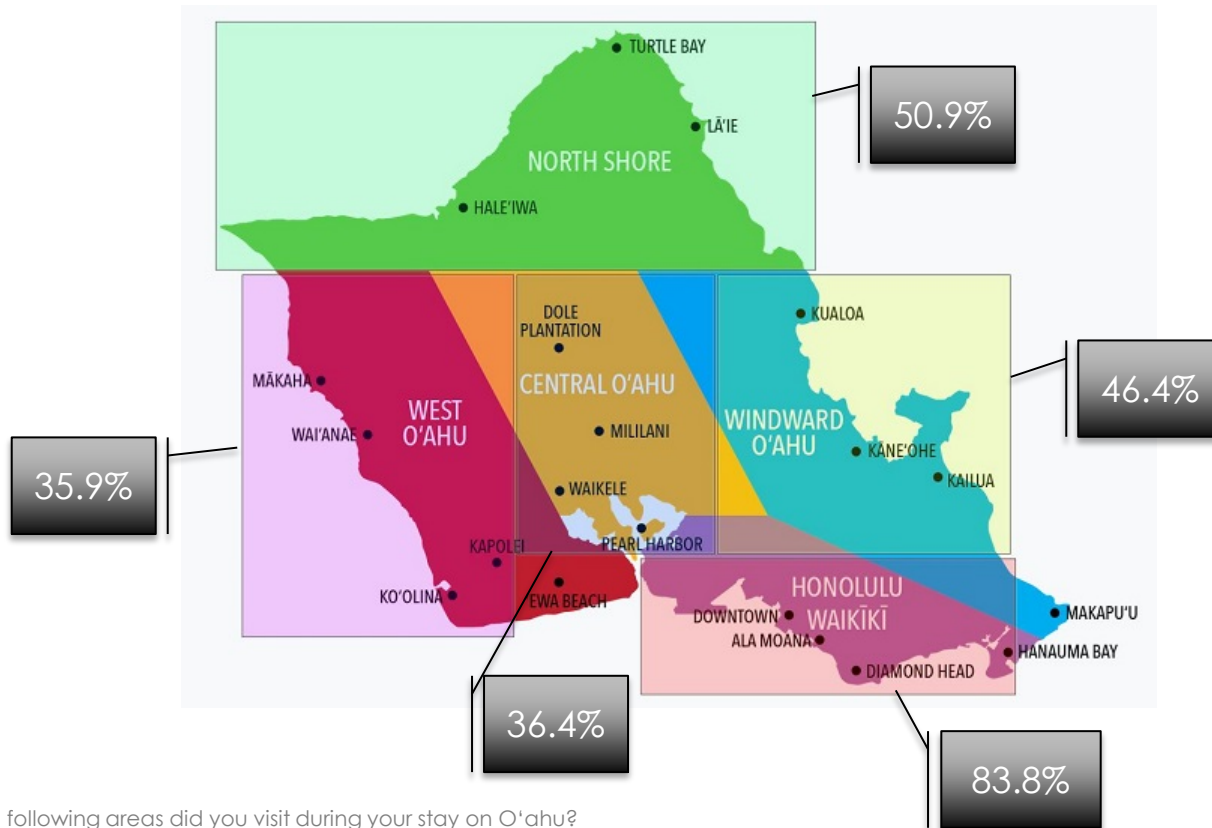
## ATTRACTIONS – O‘AHU (cont.)

	U.S. West	U.S. East
<b>Pearl Harbor</b>	31.8%	43.5%
<b>Polynesian Cultural Center</b>	11.9%	9.9%
<b>Queen Emma’s Summer Palace</b>	2.0%	0.6%
<b>Sea Life Park Hawai‘i</b>	2.4%	3.7%
<b>Waikiki Aquarium</b>	1.7%	0.6%
<b>Waimanalo Beach Park</b>	15.8%	20.2%
<b>Waimea Valley</b>	22.0%	23.2%

# AREAS VISITED U.S. WEST

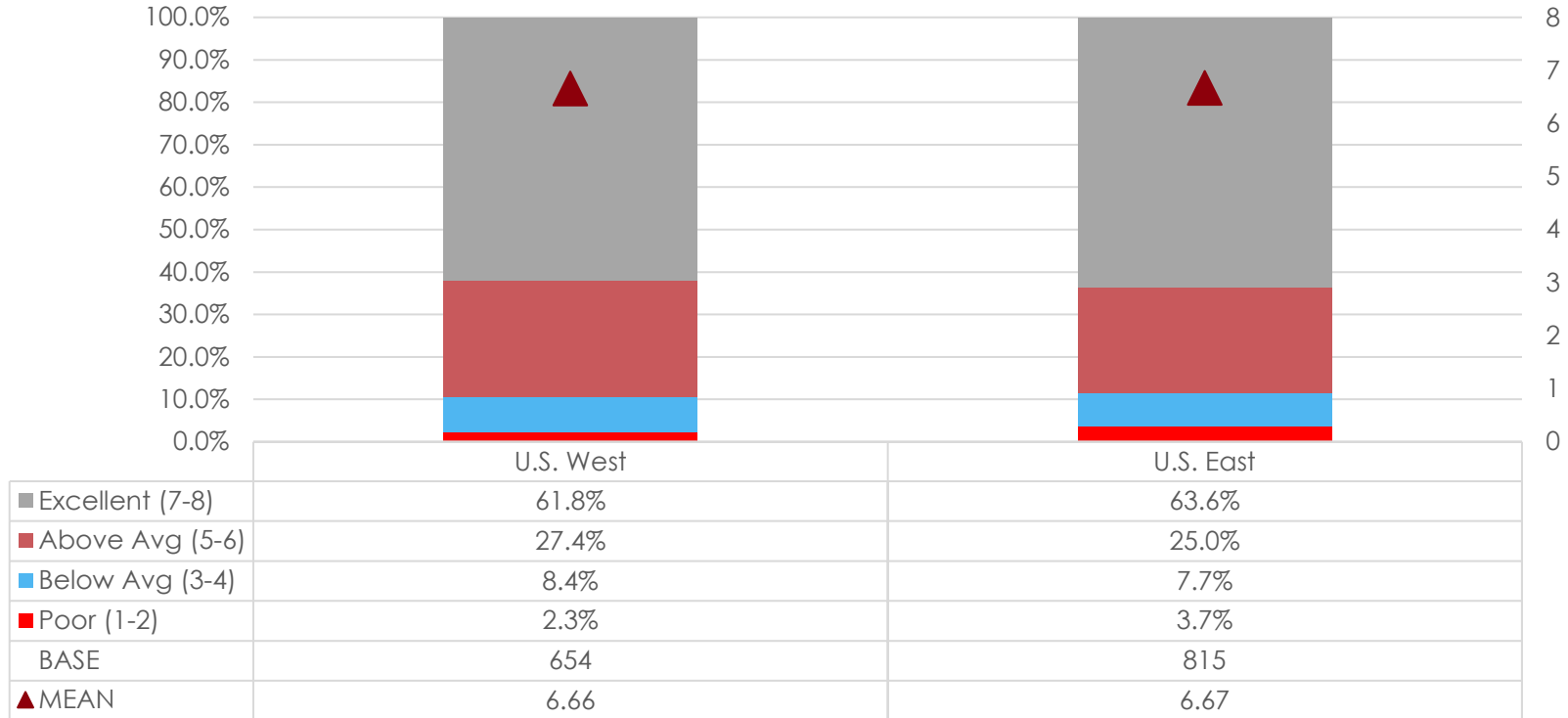


# AREAS VISITED U.S. EAST

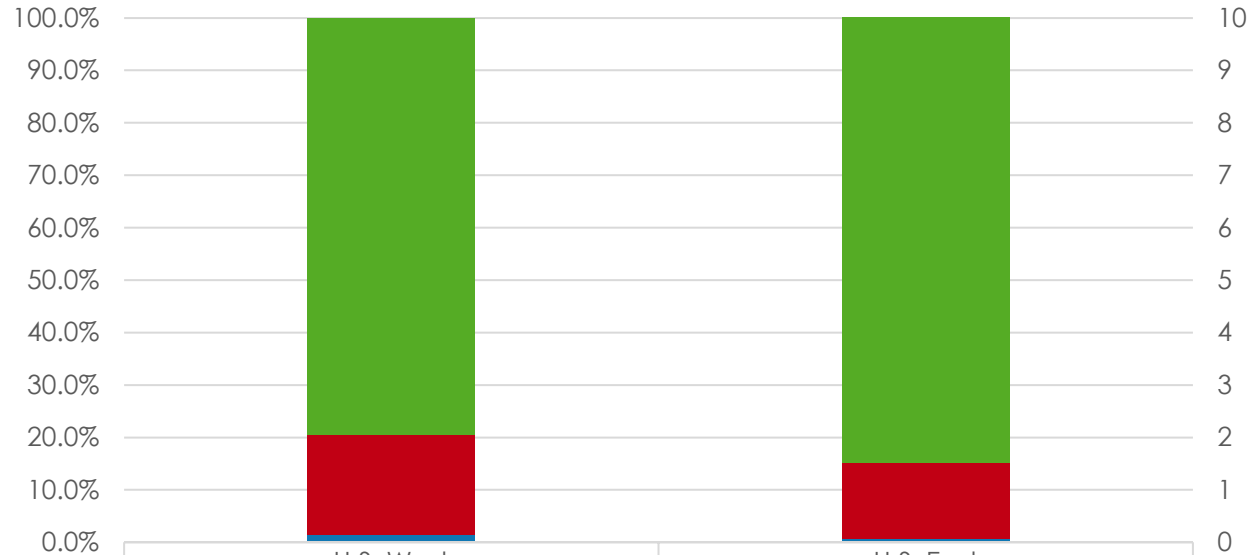


# SATISFACTION – Daniel K. Inouye International Airport

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



# SNORKELING EQUIPMENT USED – O‘AHU



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	85.9%	88.6%
■ Full-face snorkel mask	19.0%	14.4%
■ Neither of these	1.5%	0.7%
BASE	261	277

# SNORKELING OCEAN SAFETY – O‘AHU

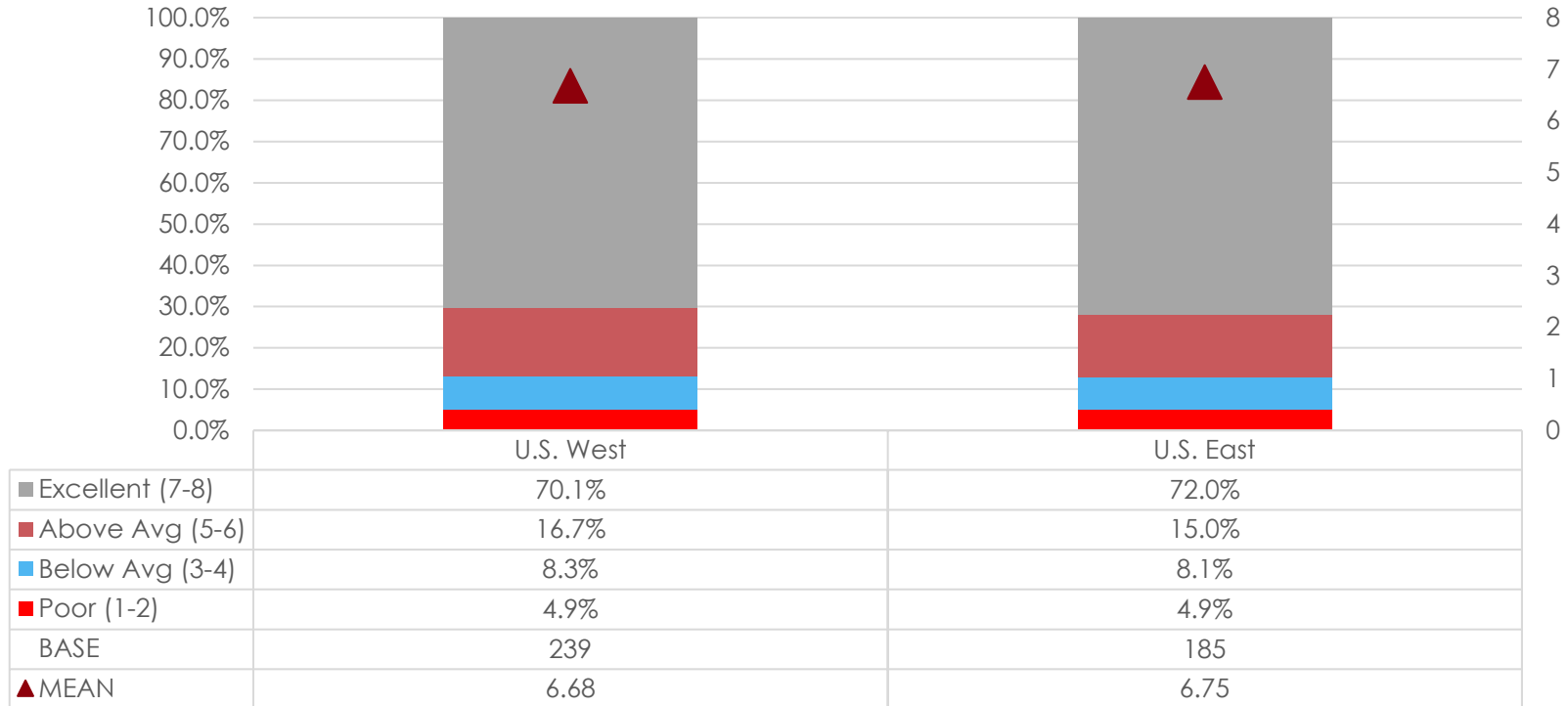
	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	99.6%	98.5%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	0.4%	1.1%
<b>Yes, while snorkeling using a full face mask</b>	-	0.4%
<b>BASE</b>	257	275

# SECTION 6 – KAUA‘I



# SATISFACTION – KAUA‘I

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

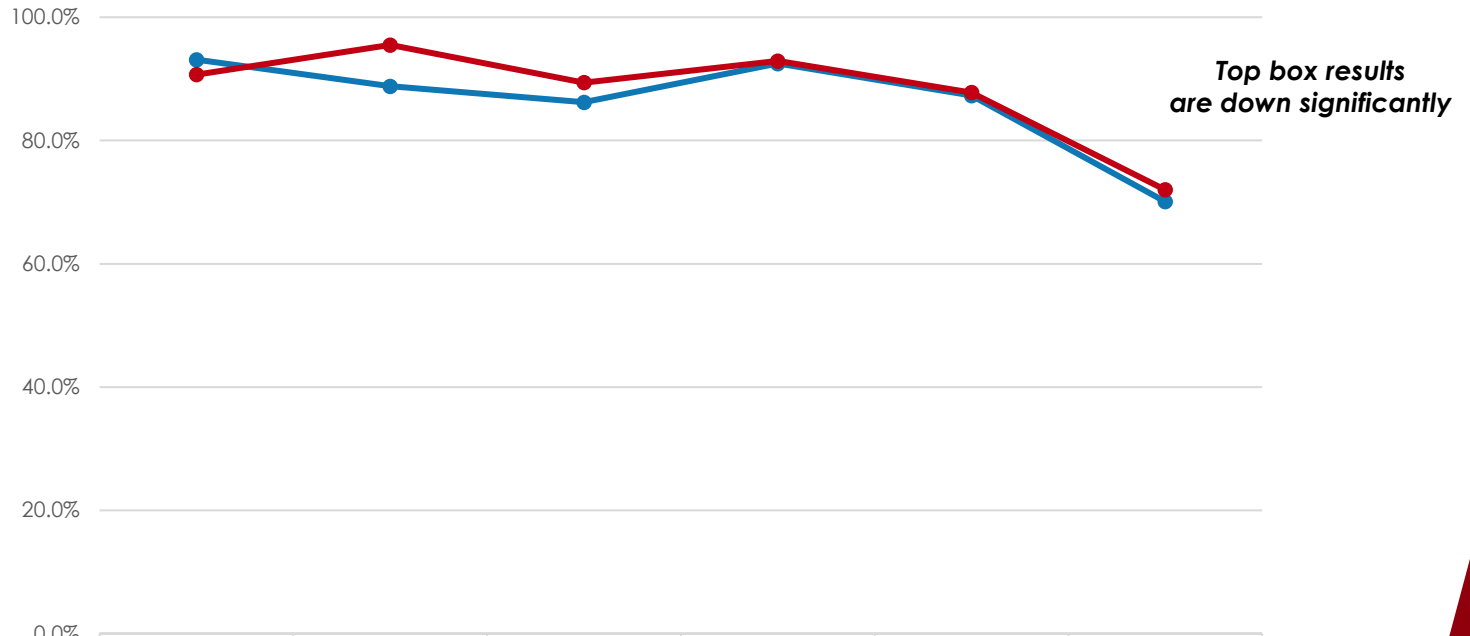


# SATISFACTION – KAUA'I

- **Age:** Among travelers from U.S. West, those between the ages of 50 and 64 provided the lowest satisfaction mean scores compared to visitors in the other age groups.
- **First-time vs Repeat visitor:** Among travelers from U.S. West, first-time visitors to the state were more satisfied with their stay on Kaua'i compared to repeat visitors.

# SATISFACTION – KAUA‘I

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

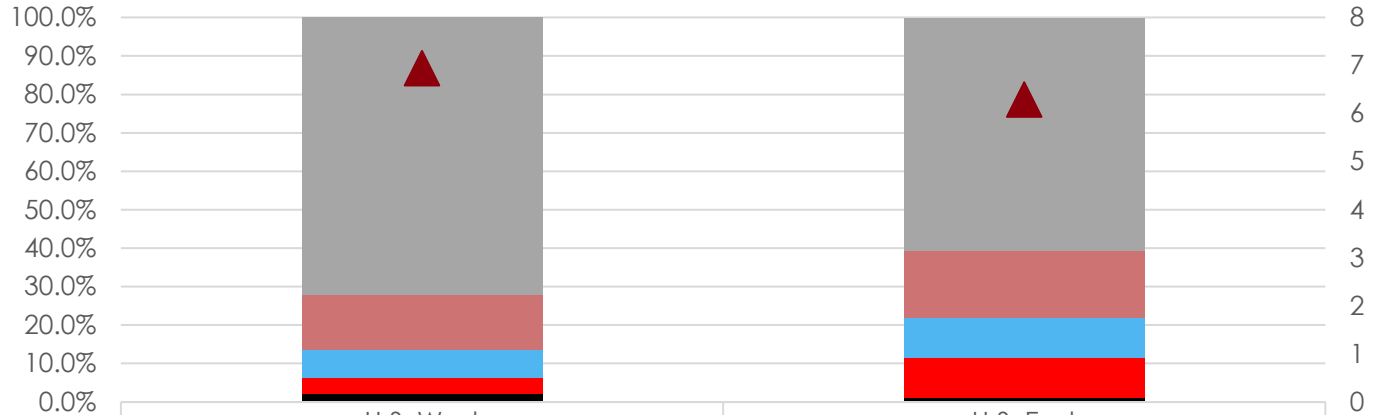


	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020 P	Q1 2021 P
U.S. West	93.1%	88.8%	86.2%	92.5%	87.3%	70.1%
U.S. East	90.7%	95.5%	89.4%	92.9%	87.8%	72.0%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – KAUA‘I

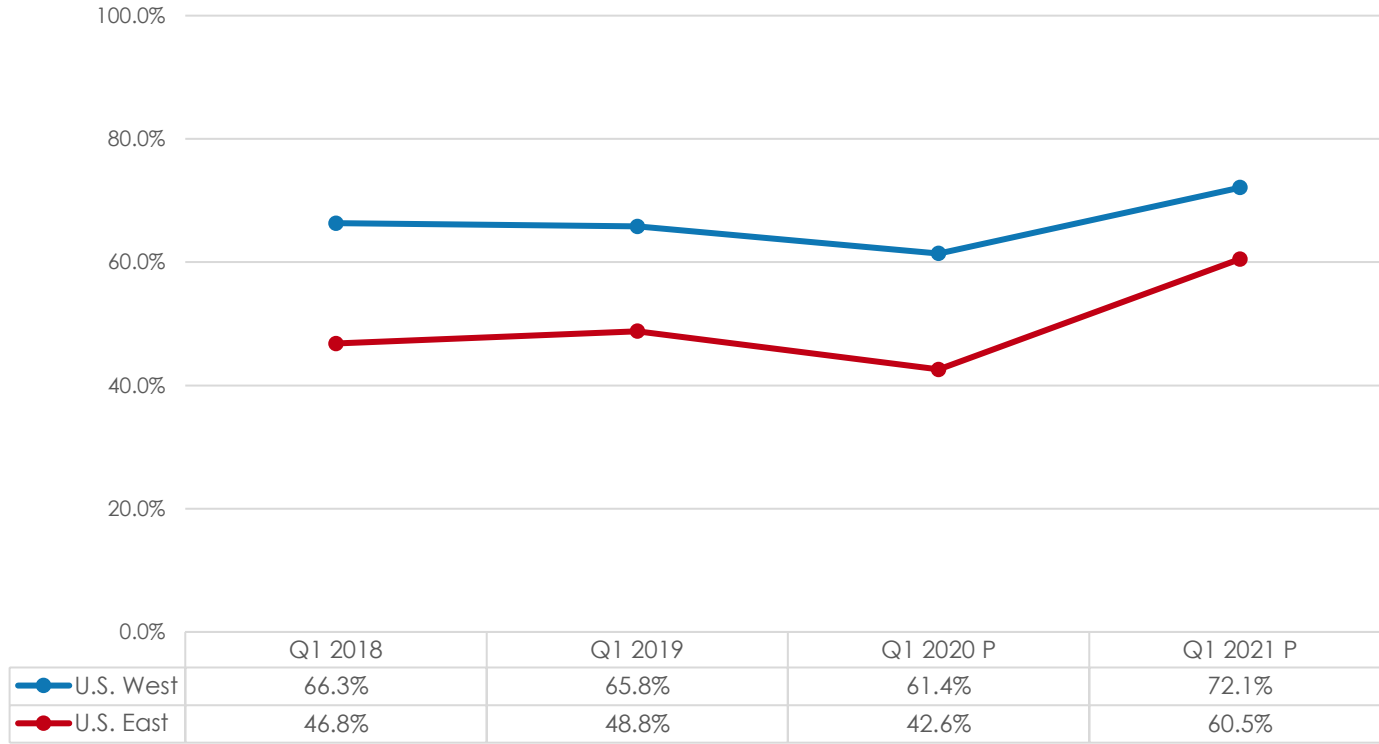
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	72.1%	60.5%
■ Somewhat likely (5-6)	14.1%	17.6%
■ Somewhat unlikely (3-4)	7.5%	10.3%
■ Very unlikely (1-2)	4.1%	10.4%
■ Not sure	2.1%	1.1%
BASE	239	183
▲ MEAN	6.94	6.29

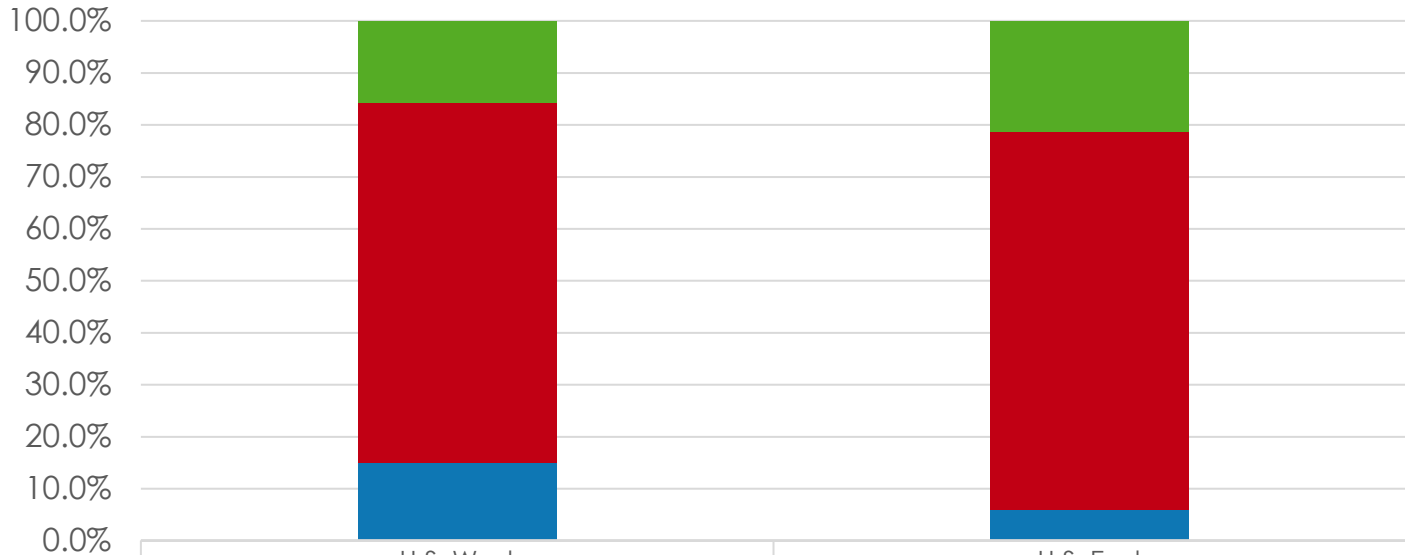
# LIKELIHOOD OF RETURN VISIT – KAUA‘I

TOP BOX – VERY LIKELY (7-8)



P= Preliminary Data

# AIDED ADVERTISING AWARENESS – KAUA'I



	U.S. West	U.S. East
■ Aided Ad Awareness	15.7%	21.3%
■ No Prior Awareness	69.3%	72.6%
■ Unsure	15.0%	6.0%
BASE	239	183

# ATTRACTIONS – KAUA‘I

	U.S. West	U.S. East
<b>Fern Grotto</b>	2.7%	0.0%
<b>Hanalei Town</b>	33.4%	31.9%
<b>Hanalei Beach</b>	31.0%	30.5%
<b>Kalapaki Beach</b>	22.5%	37.4%
<b>Kalalau Trail</b>	13.2%	16.8%
<b>Bike Path in Kapaa</b>	9.7%	9.2%
<b>Kaua‘i Museum</b>	3.3%	2.1%
<b>Ke'e Beach</b>	8.9%	10.9%
<b>Kilauea Lighthouse</b>	25.2%	30.9%
<b>Koke'e</b>	10.6%	16.6%

## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
<b>Koke'e Museum</b>	4.2%	5.5%
<b>Na Aina Kai Gardens</b>	3.8%	2.9%
<b>Napali Coast</b>	27.3%	35.8%
<b>Allerton Garden</b>	4.6%	6.6%
<b>Limahuli Garden</b>	3.6%	2.8%
<b>Old Koloa Town</b>	37.9%	37.8%
<b>Opaeka'a Falls</b>	19.5%	31.1%
<b>Po'ipu Beach</b>	64.2%	71.5%
<b>Smith's Tropical Paradise Gardens</b>	0.4%	0.0%
<b>Spouting Horn</b>	35.2%	41.3%
<b>Wailua Falls</b>	29.4%	45.9%

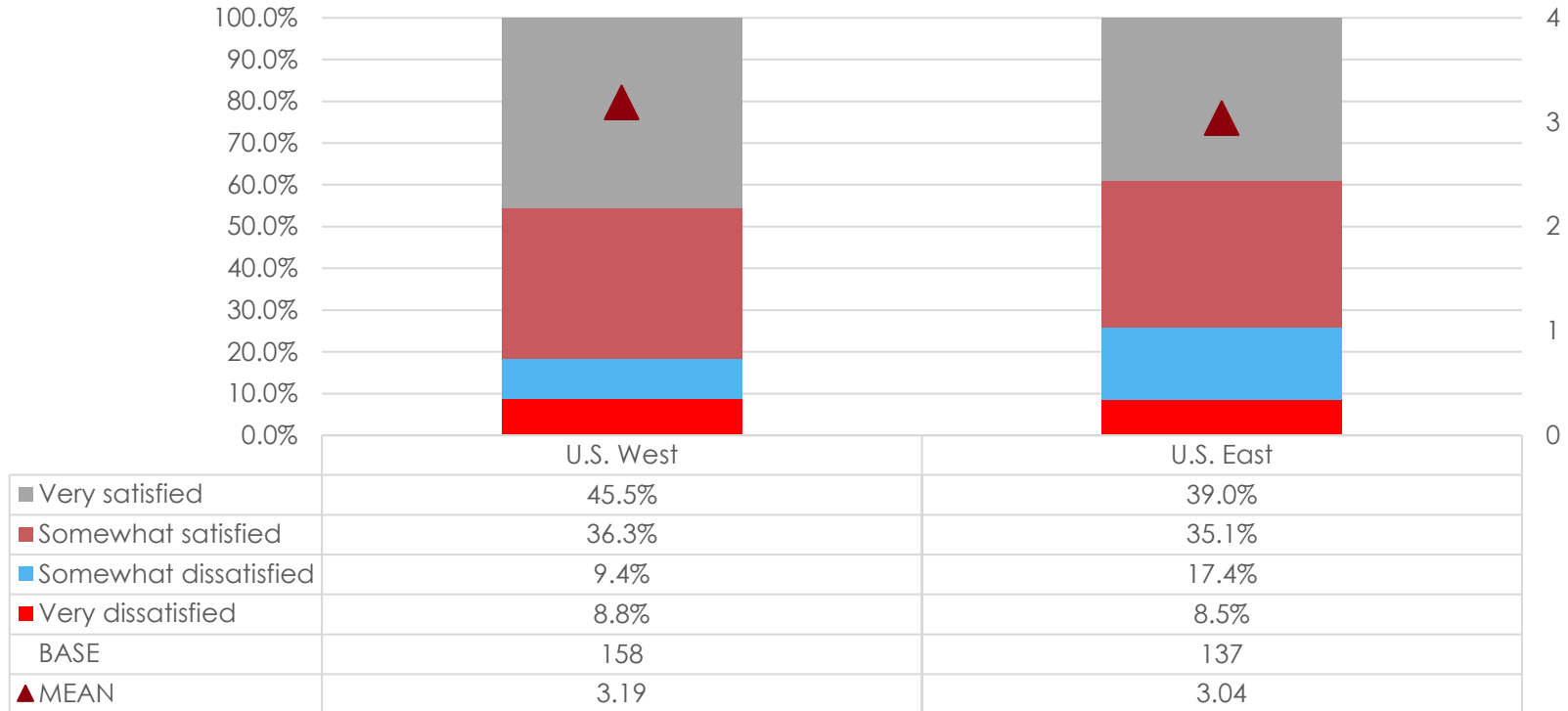


## ATTRACTIONS – KAUA‘I (cont.)

	U.S. West	U.S. East
Wailua River	13.9%	23.9%
Waimea Canyon	43.3%	57.7%
Disc Golf	1.3%	2.2%
Mini Golf	0.8%	1.1%

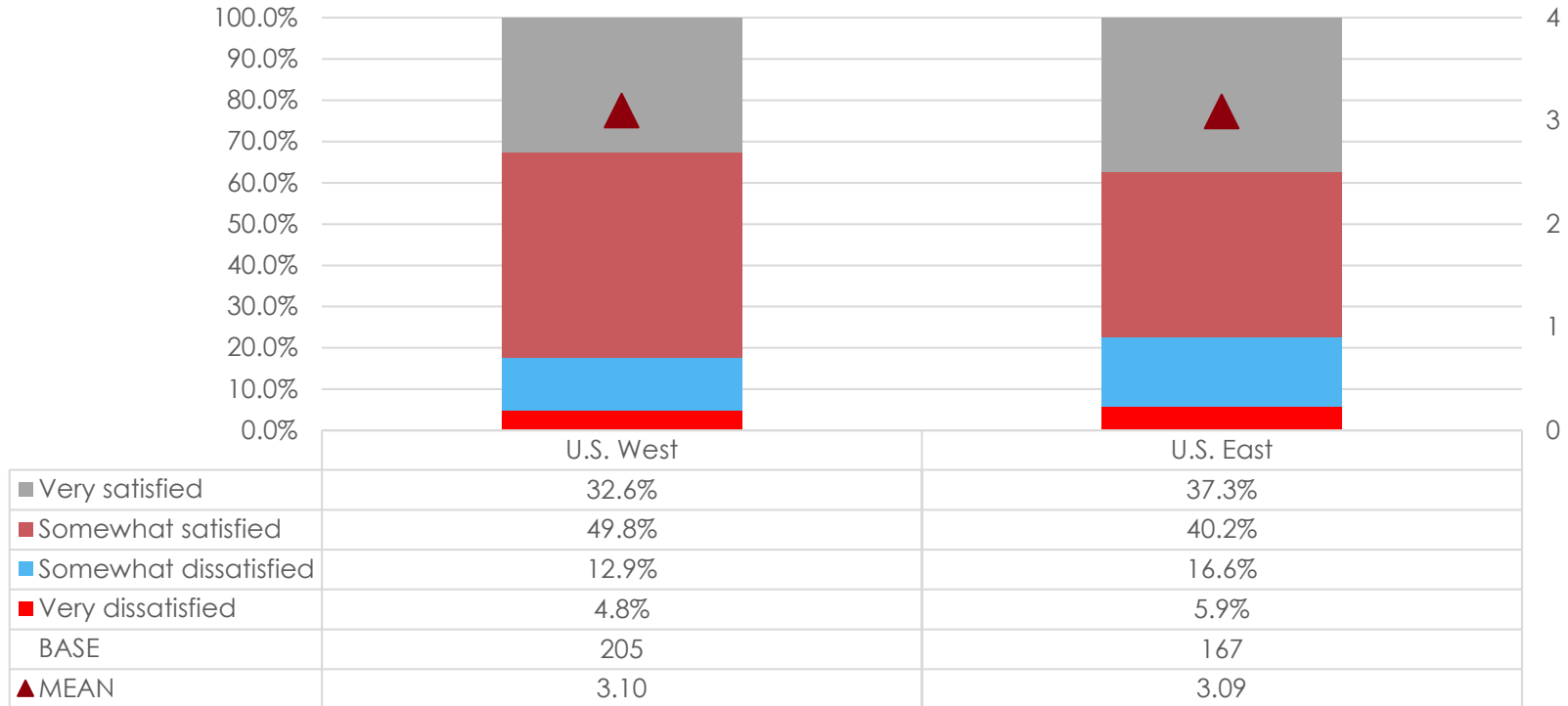
# SATISFACTION – ENTERTAINMENT

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



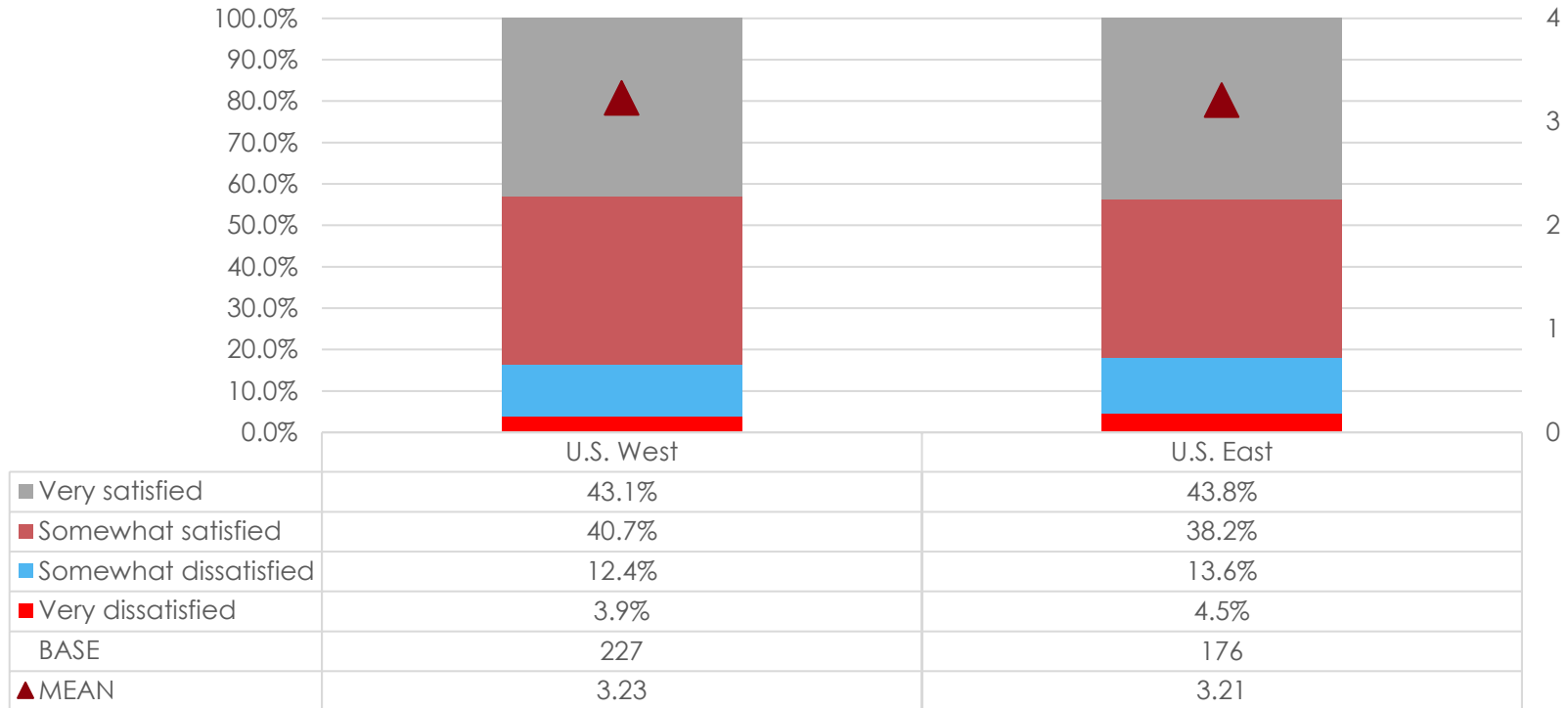
# SATISFACTION – SHOPPING

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



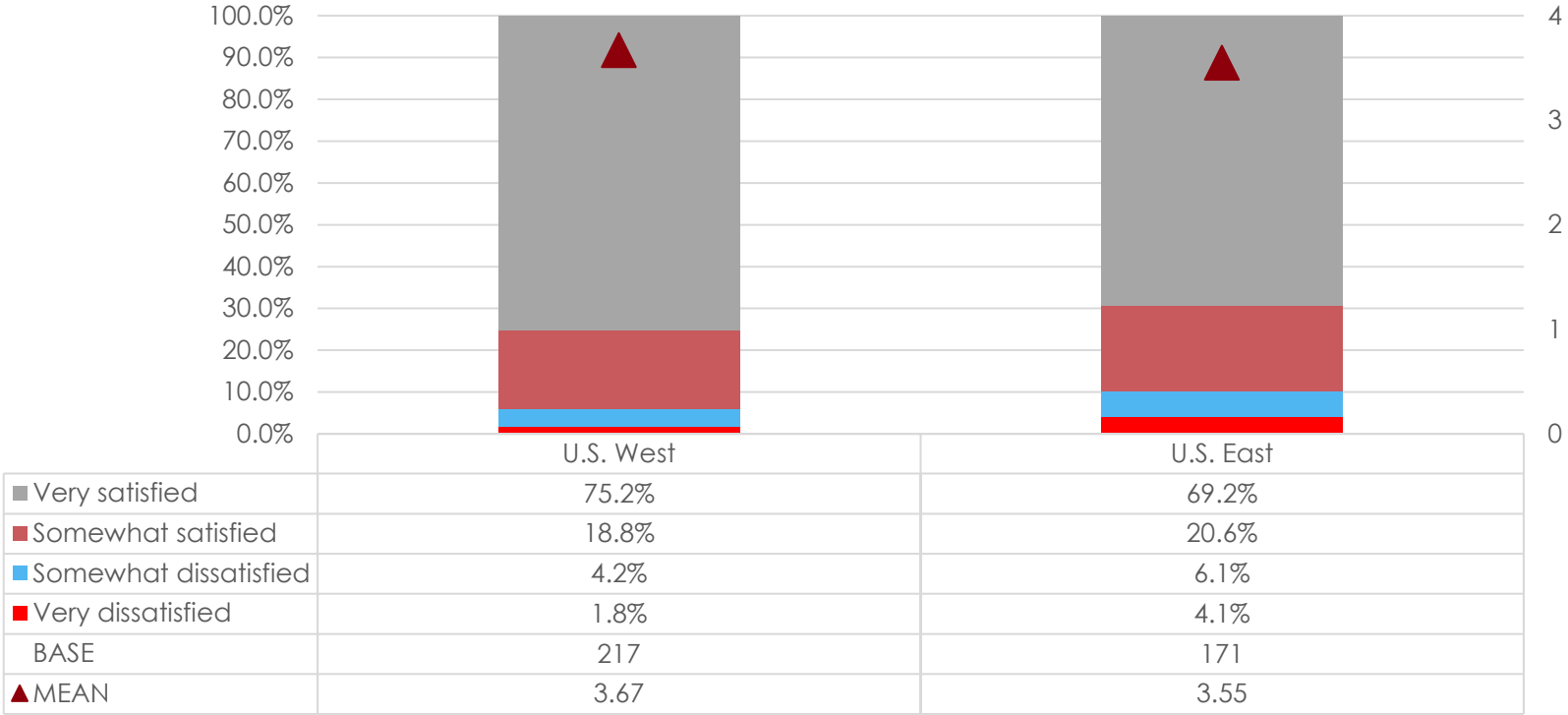
# SATISFACTION – DINING

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



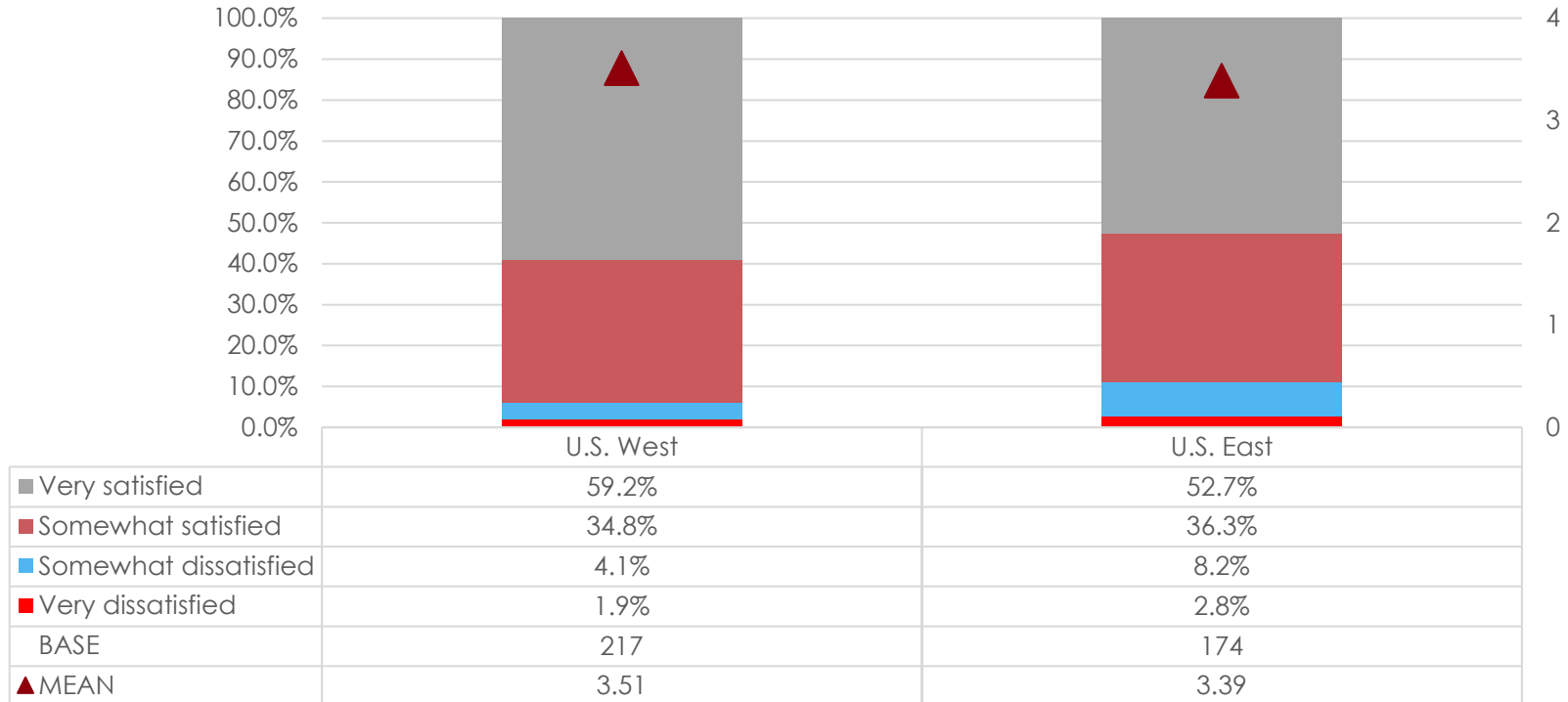
# SATISFACTION – BEACHES

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



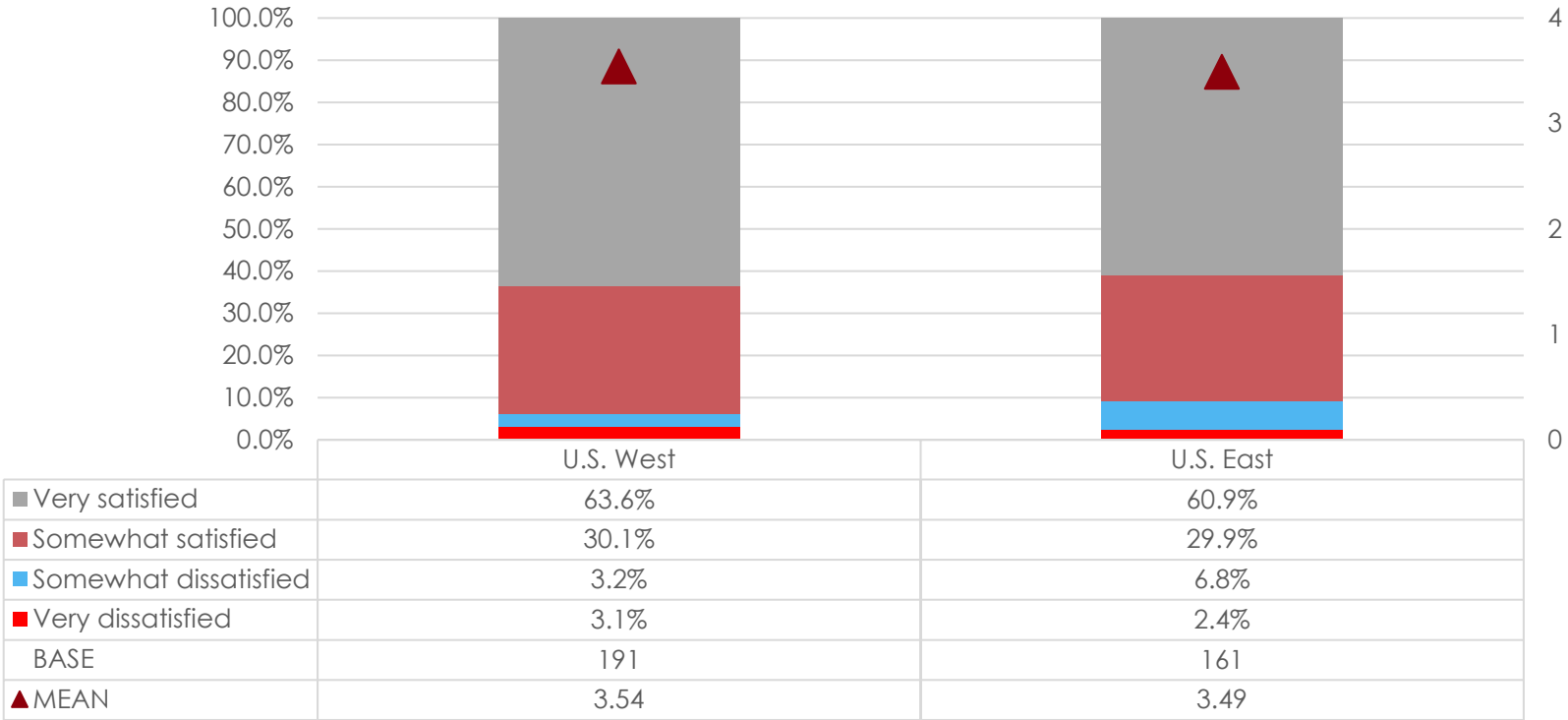
# SATISFACTION – PUBLIC AREAS

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



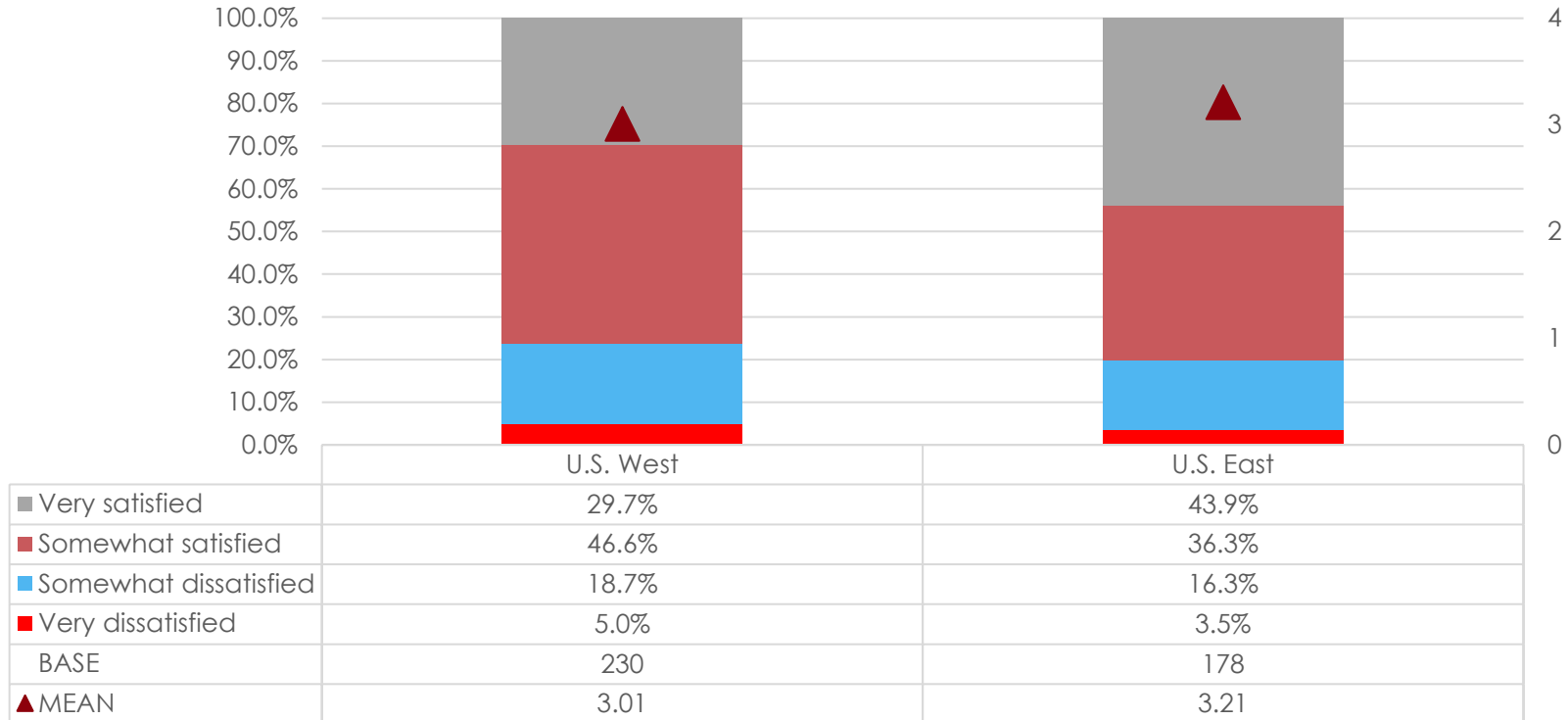
# SATISFACTION – PARKS

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



# SATISFACTION – ROADS

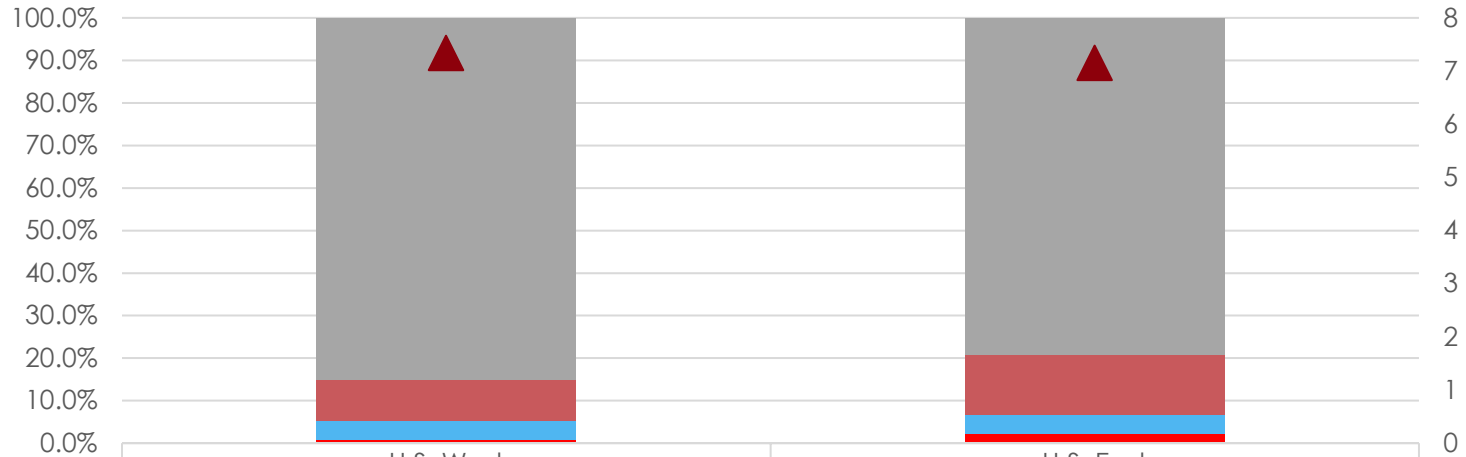
4-pt Rating Scale  
4=Very Satisfied / 1=Very Dissatisfied





# FRIENDLINESS OF KAUA'I RESIDENTS

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

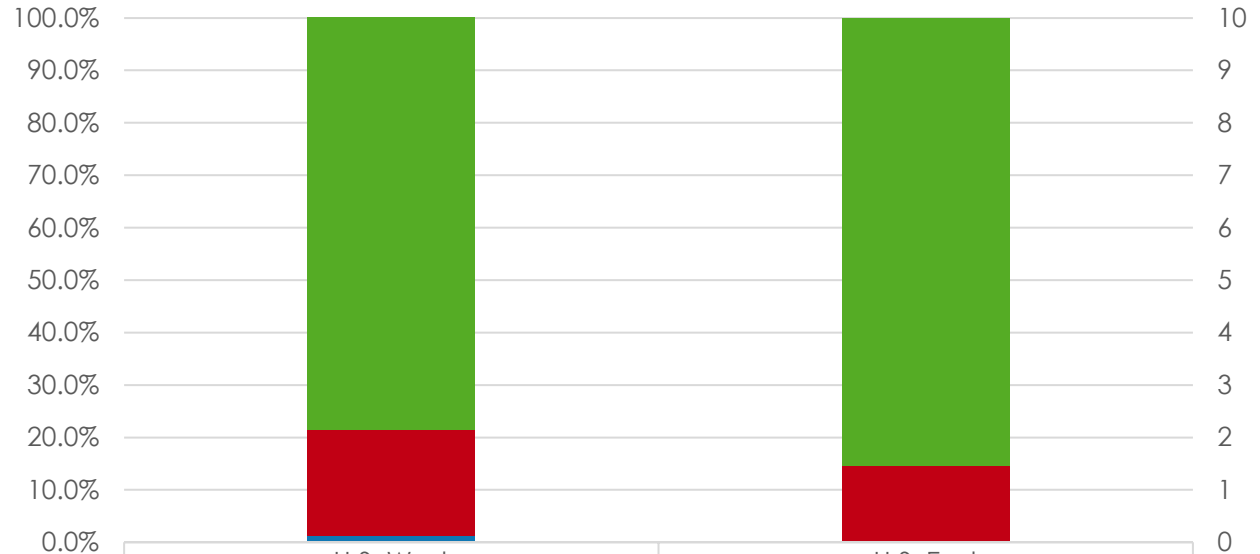


	U.S. West	U.S. East
■ Excellent (7-8)	85.0%	79.2%
■ Above Avg (5-6)	9.6%	14.2%
■ Below Avg (3-4)	4.5%	4.4%
■ Poor (1-2)	0.8%	2.2%
BASE	239	183
▲ MEAN	7.34	7.15

## TOP INFLUENCERS – KAUA‘I TRIP

	U.S. West	U.S. East
Been here before	43.6%	34.4%
Friend recommendation	23.3%	30.7%
Visiting Family/ Friends	9.4%	8.1%
Own a timeshare	3.4%	6.7%
Business related	4.1%	3.9%
Article/ Blog	2.5%	2.8%
Location/ Never been, but went to other islands	3.3%	0.5%
Have timeshare/Have property/Renting	2.9%	1.6%
Coronavirus / COVID 19 pandemic	1.2%	2.7%
Nature/ Beauty/ Scenery	1.6%	1.2%
Other (please specify)	1.2%	1.6%
Package price/ affordability / cost	1.4%	1.1%

# SNORKELING EQUIPMENT USED – KAUA‘I



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	87.5%	91.7%
■ Full-face snorkel mask	20.2%	14.6%
■ Neither of these	1.2%	
BASE	78	61

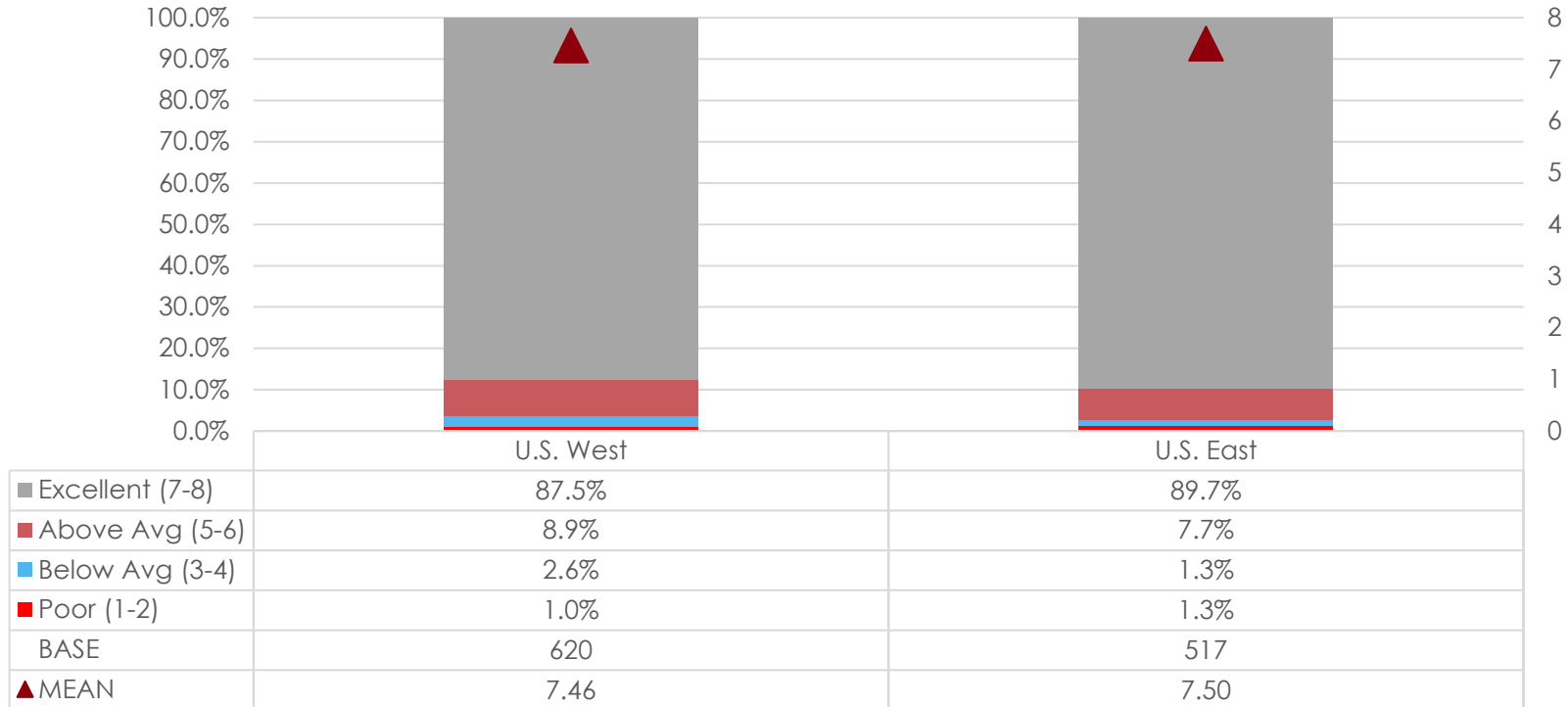
# SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>		
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	1.5%	1.6%
<b>Yes, needed assistance using full face snorkel mask</b>		
<b>BASE</b>	77	61

# SECTION 7 – MAUI

# SATISFACTION – MAUI

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

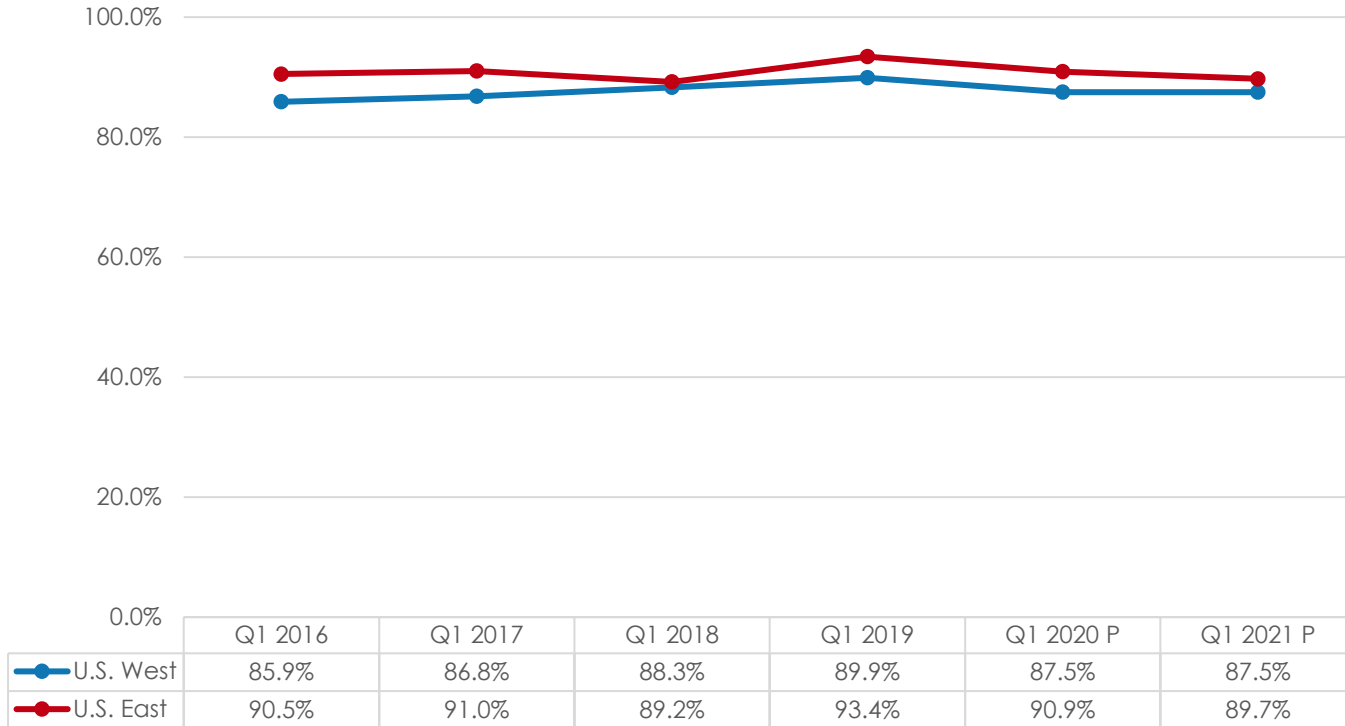


# SATISFACTION – MAUI

- **Gender:** Satisfaction ratings for Maui were higher among female visitors compared to male visitors from the U.S. East market.
- **Age:** Among U.S. East visitors, satisfaction with Maui were the highest amongst young adults under the age of 35 and declined incrementally with the older age groups.
- **Islands visited:** Visitors from U.S. West and U.S. East whose entire trip was spent on Maui were more satisfied with Maui, compared to those who visited multiple islands during their stay.

# SATISFACTION – MAUI

## TOP BOX – EXCELLENT (7-8)

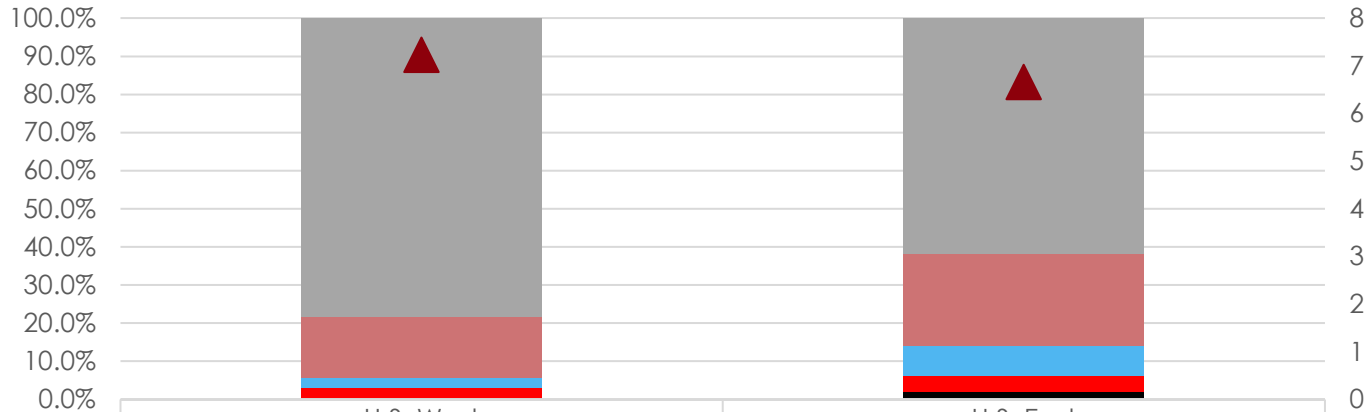


P= Preliminary Data



# LIKELIHOOD OF RETURN VISIT – MAUI

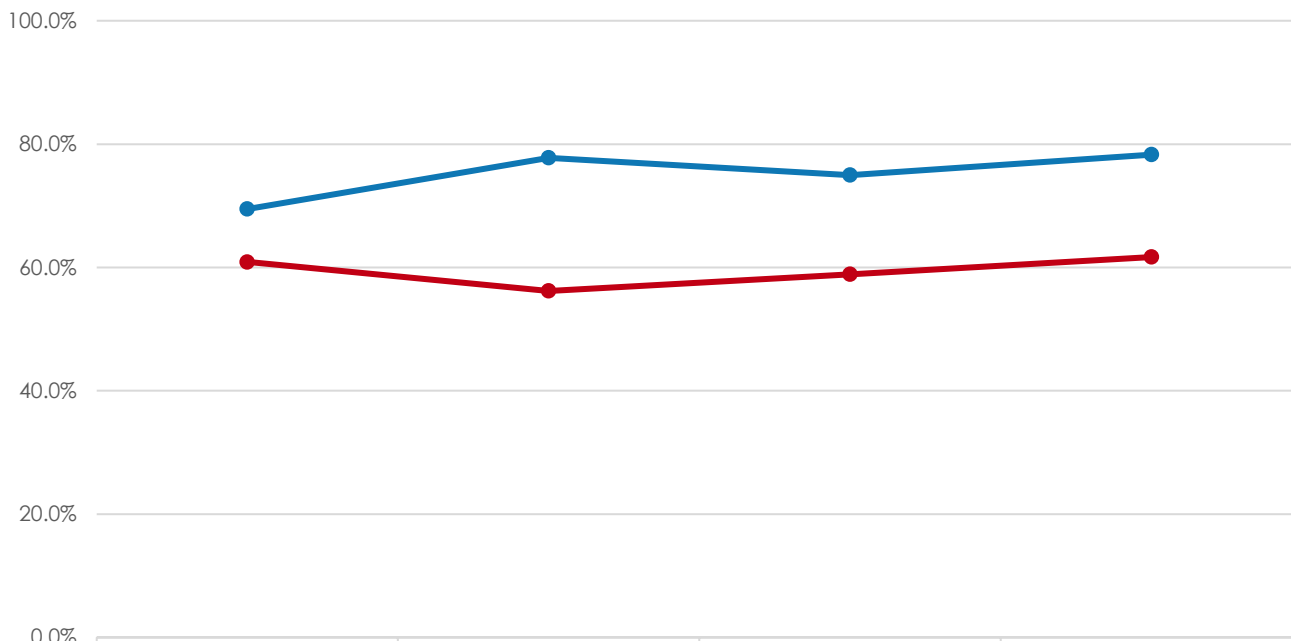
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	78.3%	61.7%
■ Somewhat likely (5-6)	15.9%	24.3%
■ Somewhat unlikely (3-4)	2.9%	7.7%
■ Very unlikely (1-2)	2.4%	4.4%
■ Not sure	0.5%	1.9%
BASE	595	488
▲ MEAN	7.23	6.66

# LIKELIHOOD OF RETURN VISIT – MAUI

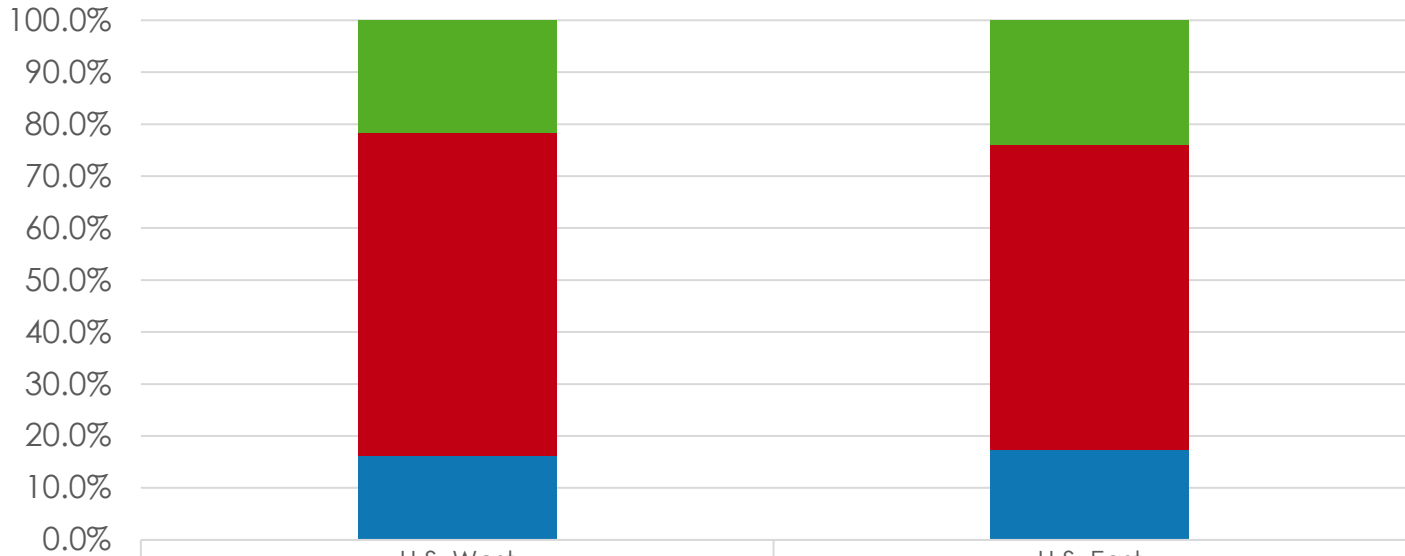
TOP BOX – VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020 P	Q1 2021 P
U.S. West	69.5%	77.8%	75.0%	78.3%
U.S. East	60.9%	56.2%	58.9%	61.7%

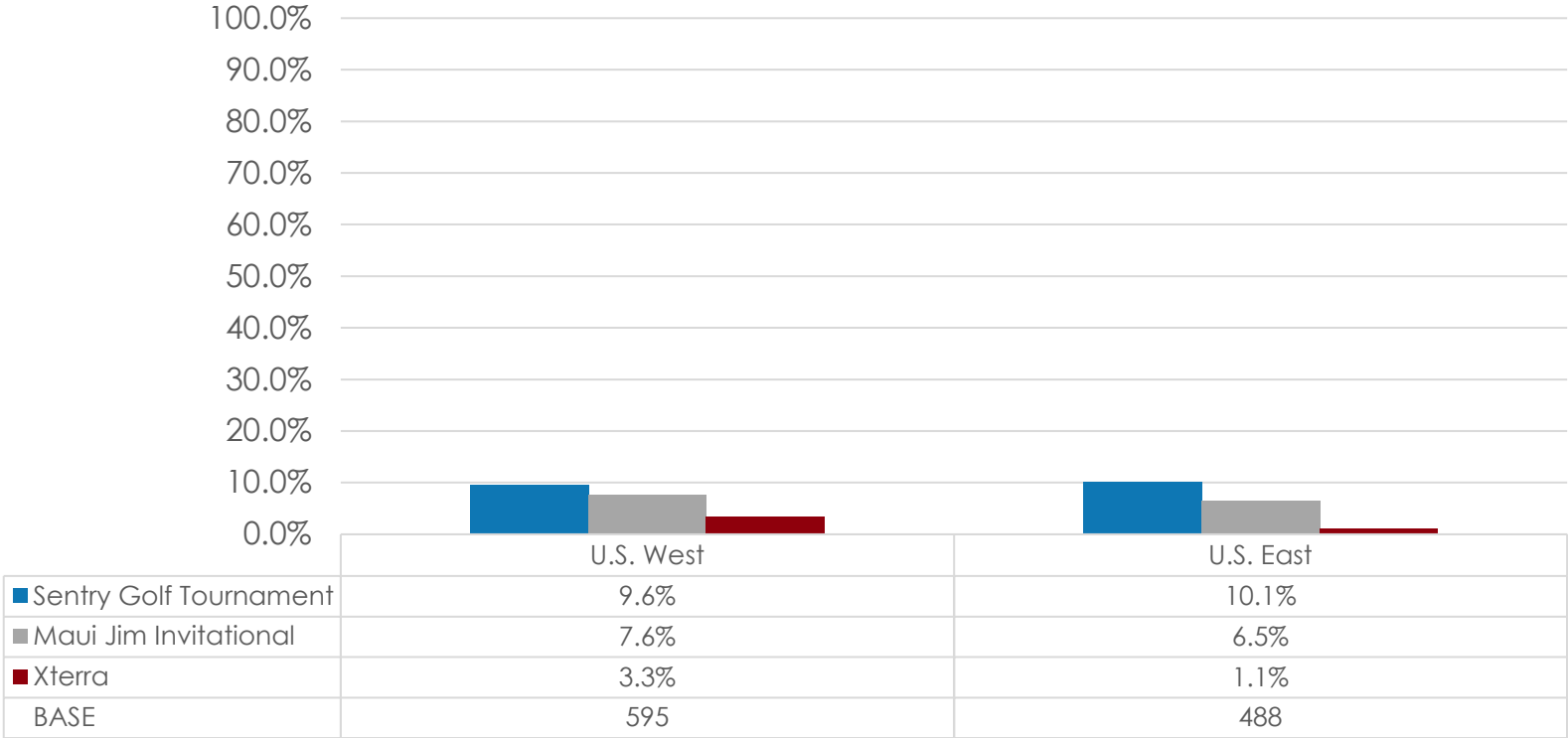
P= Preliminary Data

# AIDED ADVERTISING AWARENESS – MAUI



	U.S. West	U.S. East
■ Aided Ad Awareness	21.6%	24.0%
■ No Prior Awareness	62.2%	58.7%
■ Unsure	16.2%	17.3%
BASE	595	488

# AIDED ADVERTISING AWARENESS – MAUI EVENTS



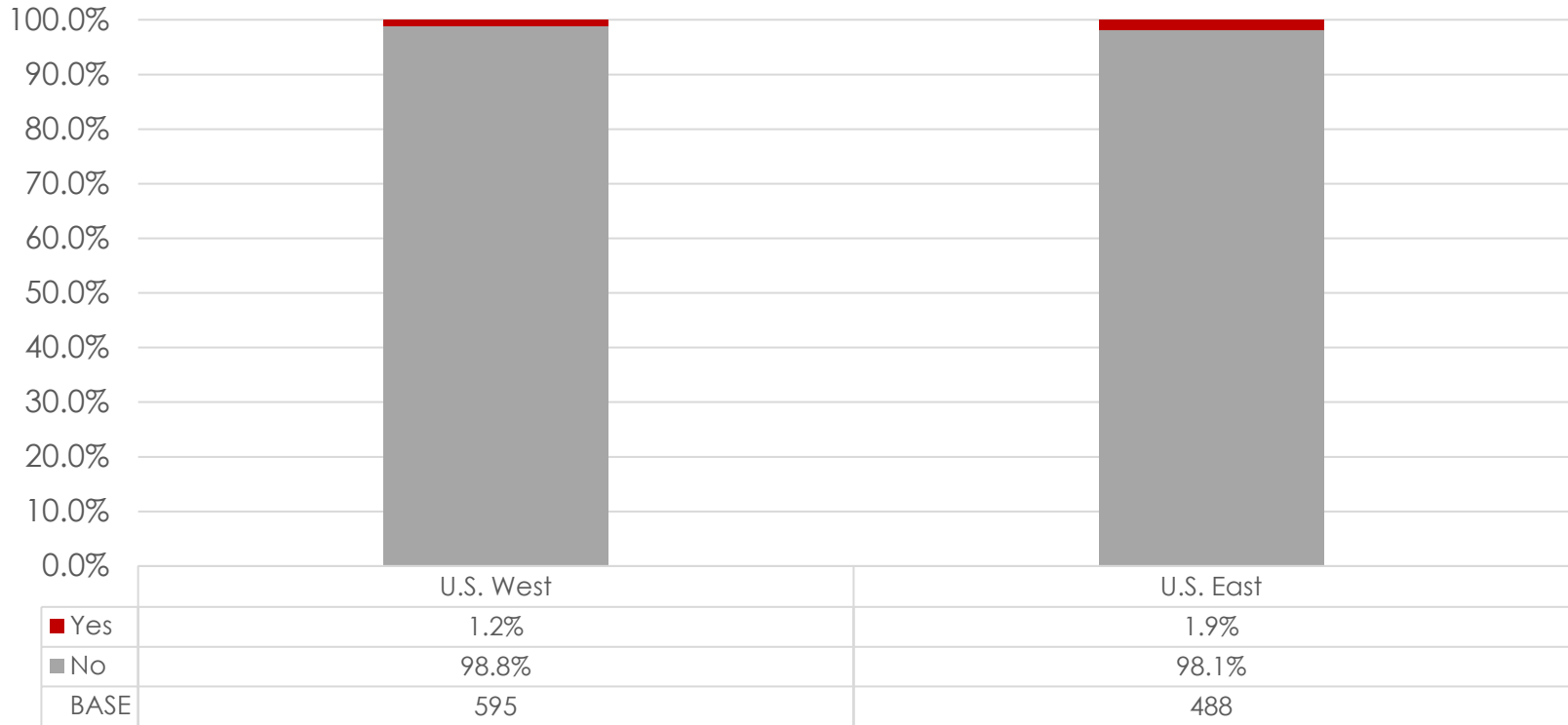
## MOTIVATING FACTORS – MAUI

	U.S. West	U.S. East
<b>Famous landmarks or imagery/ natural beauty</b>	35.2%	49.7%
<b>Outdoor or sporting activities and events</b>	21.0%	22.9%
<b>Hawaiian cultural events</b>	6.3%	11.1%
<b>Social media posts and videos</b>	5.1%	14.7%
<b>Hawaiian Music</b>	5.9%	6.7%
<b>TV programs/ Movies filmed in Hawai'i</b>	2.7%	5.0%
<b>None of these</b>	54.3%	40.0%

# ATTRACTIONS – MAUI

	U.S. West	U.S. East
Alexander & Baldwin Sugar Museum	1.2%	1.0%
Aquarium Maui /Maui Ocean Center	10.4%	11.1%
Baldwin Missionary Home Museum	3.5%	2.1%
Hale Pa'i Printing House	0.2%	0.0%
Haleakala National Park	28.2%	43.1%
Haleki'i Pihana Heiau State Monument	2.1%	2.3%
Hana Cultural Center	4.9%	10.0%
'Iao Valley State Monument	14.8%	16.5%
Kepaniwai Park & Heritage Gardens	3.5%	4.9%
Kula Botanical Garden	6.4%	8.3%
Maui Historical Society Bailey House Museum	0.3%	1.2%
Whaler's Village Museum	11.0%	9.7%
Wo Hing Temple Museum	0.0%	0.2%

# VISITED MAUI FOR SPECIFIC EVENT

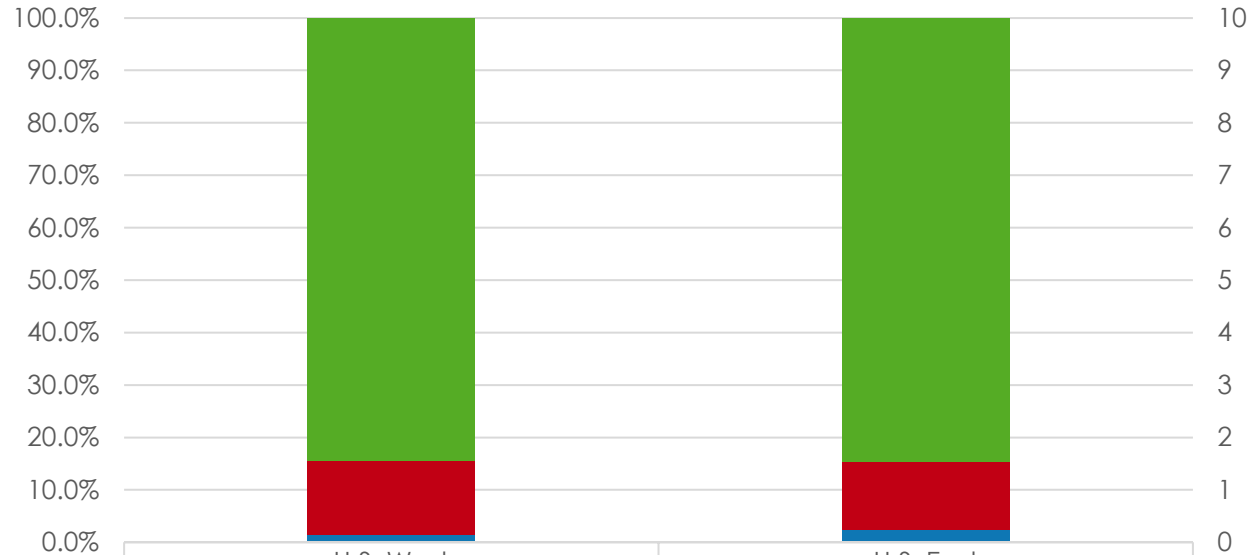


## VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East
Wedding/ honeymoon/ Anniversary/ Birthday/ Funeral	73.1%	57.6%
Convention/ meeting/ conference/ workshop	13.5%	31.8%
Sentry Tournament of Gold Champions	13.5%	10.6%
BASE	7	9



# SNORKELING EQUIPMENT USED – MAUI



	U.S. West	U.S. East
■ 2-Piece, separate mask & snorkel	90.9%	88.2%
■ Full-face snorkel mask	14.2%	13.0%
■ Neither	1.4%	2.4%
BASE	356	247

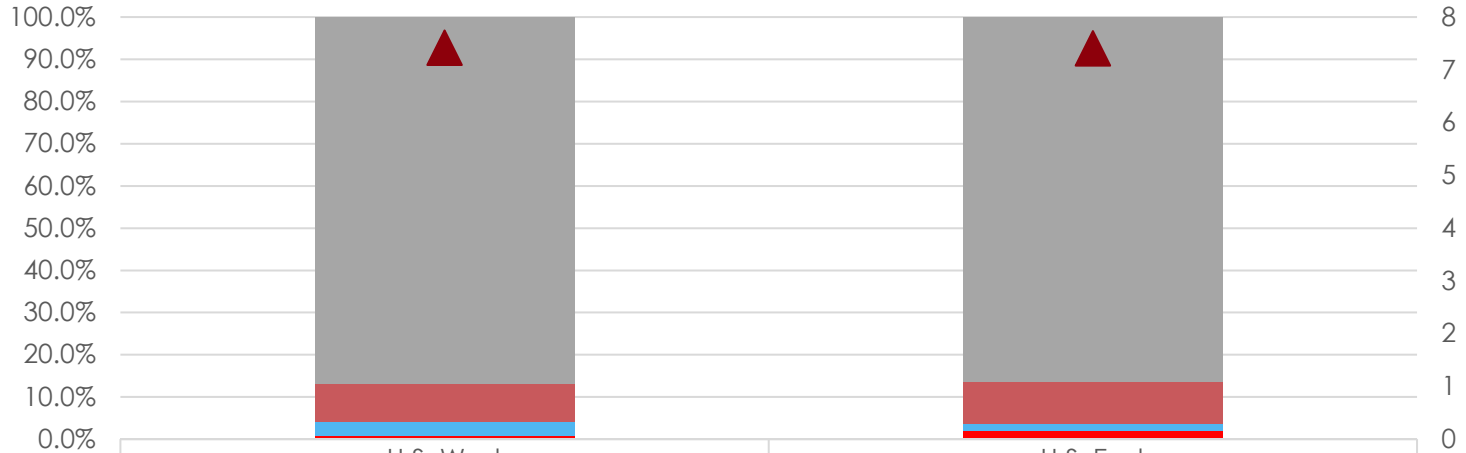
# SNORKELING OCEAN SAFETY – MAUI

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	98.8%	98.7%
<b>Yes needed assistance two piece mask &amp; snorkel</b>	0.6%	1.3%
<b>Yes, needed assistance full snorkel facemask</b>	0.6%	-
<b>BASE</b>	351	241

# SECTION 8 – ISLAND OF HAWAI‘I

# SATISFACTION – ISLAND OF HAWAI‘I

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



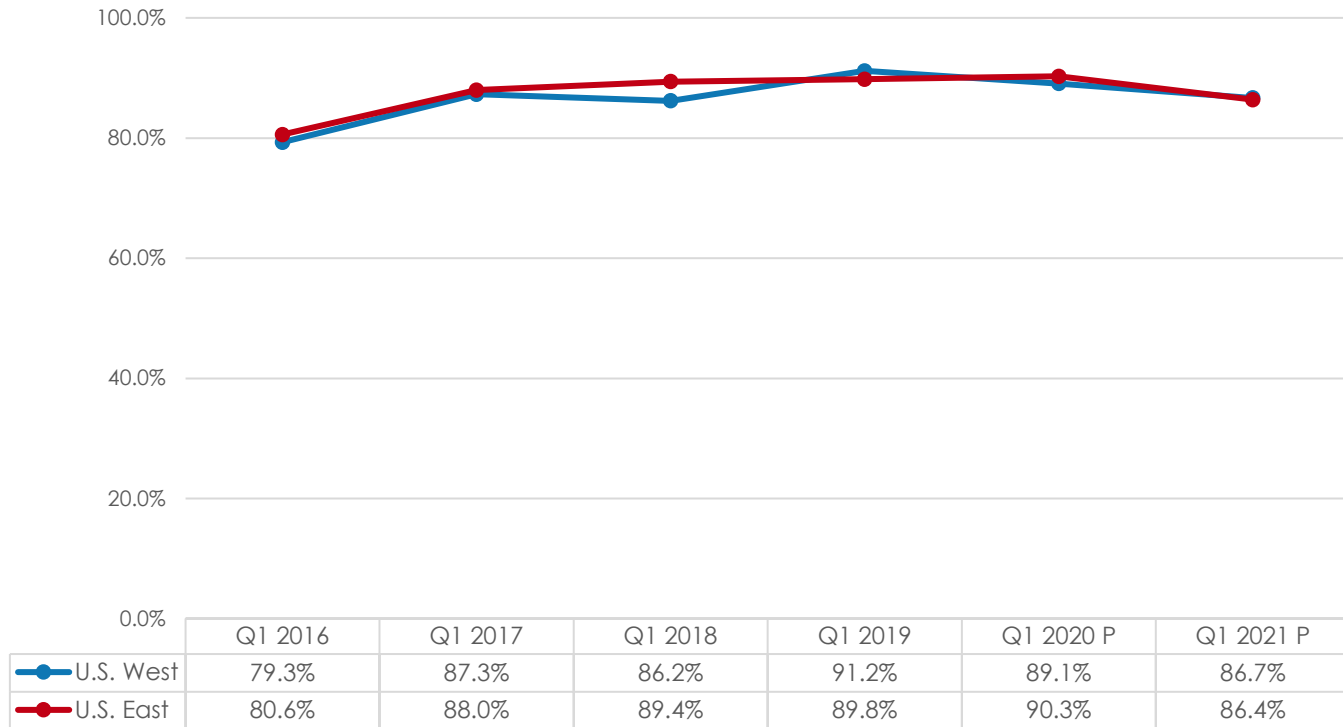
	U.S. West	U.S. East
■ Excellent (7-8)	86.7%	86.4%
■ Above Avg (5-6)	9.2%	10.0%
■ Below Avg (3-4)	3.3%	1.9%
■ Poor (1-2)	0.8%	1.8%
BASE	500	464
▲ MEAN	7.42	7.41

# SATISFACTION – ISLAND OF HAWAI‘I

- **Gender:** Female visitors from U.S. West and U.S. East gave higher satisfaction scores for the Island of Hawai‘i compared to their male counterparts.
- **Islands visited:** Visitors from U.S. West whose trip was spent entirely on the Island of Hawai‘i were more satisfied with their stay, compared to those who visited multiple islands. The same was true among U.S. East visitors.
- **Age:** Among visitors from U.S. West, satisfaction was highest among younger travelers compared to other age groups.
- **Education:** College graduates from U.S. West were more satisfied with their stay on the Island of Hawai‘i compared to those without a college degree from this visitor market.

# SATISFACTION – ISLAND OF HAWAII

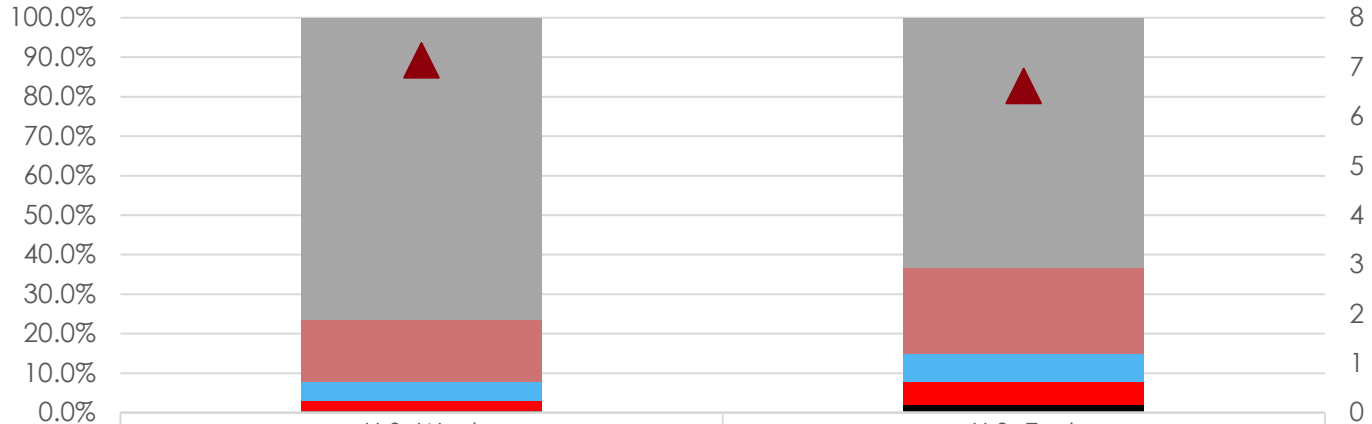
## TOP BOX – EXCELLENT (7-8)



P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

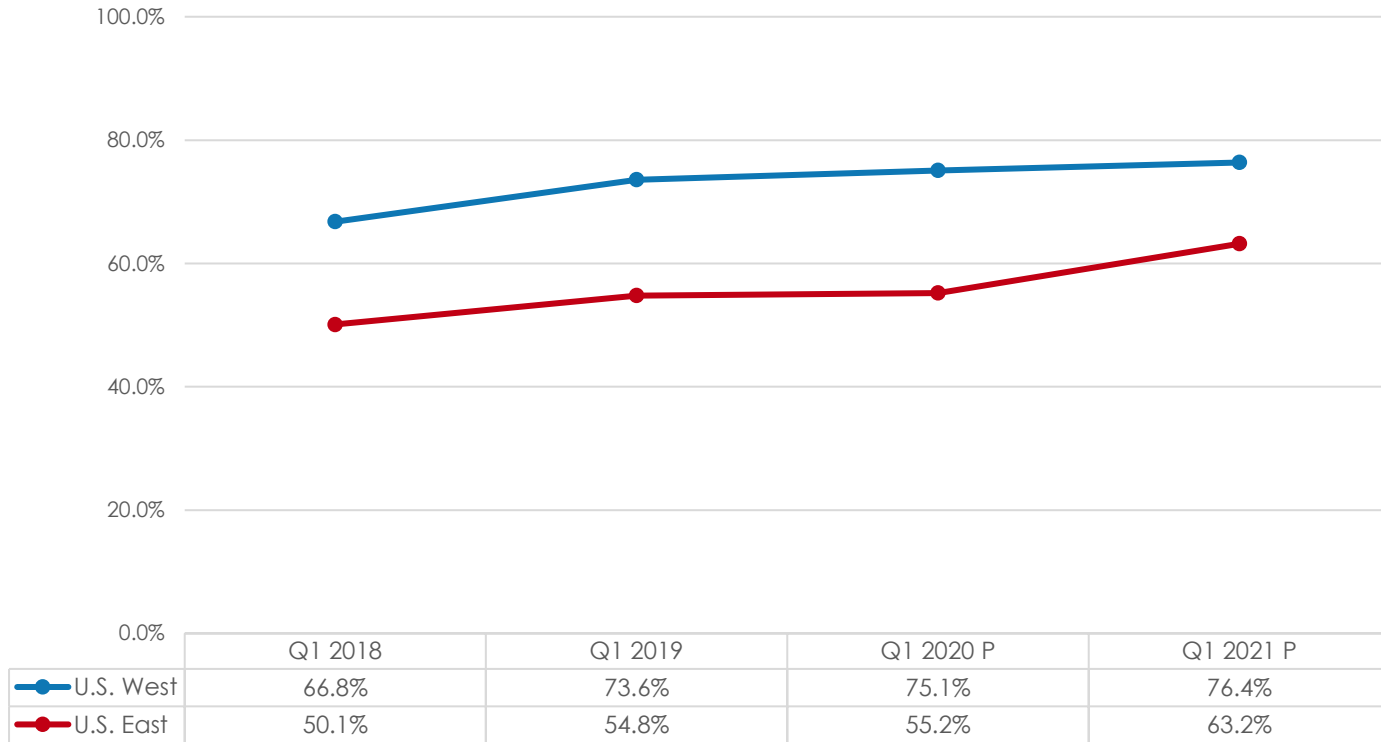
8-pt Rating Scale  
8=Very Likely / 1=Very Unlikely



	U.S. West	U.S. East
■ Very likely (7-8)	76.4%	63.2%
■ Somewhat likely (5-6)	15.9%	21.9%
■ Somewhat unlikely (3-4)	4.8%	7.0%
■ Very unlikely (1-2)	2.5%	5.9%
■ Not sure	0.4%	2.0%
BASE	492	449
▲ MEAN	7.14	6.62

# LIKELIHOOD OF RETURN VISIT – ISLAND OF HAWAI‘I

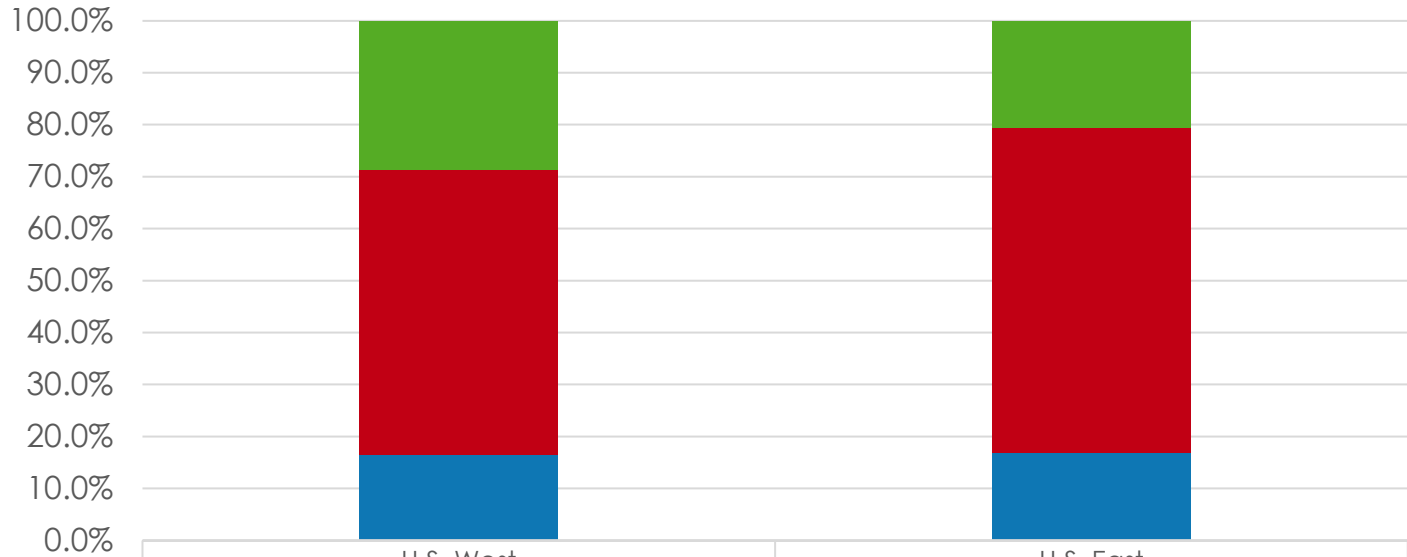
TOP BOX – EXCELLENT (7-8)



P= Preliminary Data



# AIDED ADVERTISING AWARENESS – ISLAND OF HAWAI‘I



	U.S. West	U.S. East
■ Aided Ad Awareness	28.6%	20.5%
■ No Prior Awareness	55.0%	62.6%
■ Unsure	16.4%	16.8%
BASE	492	449

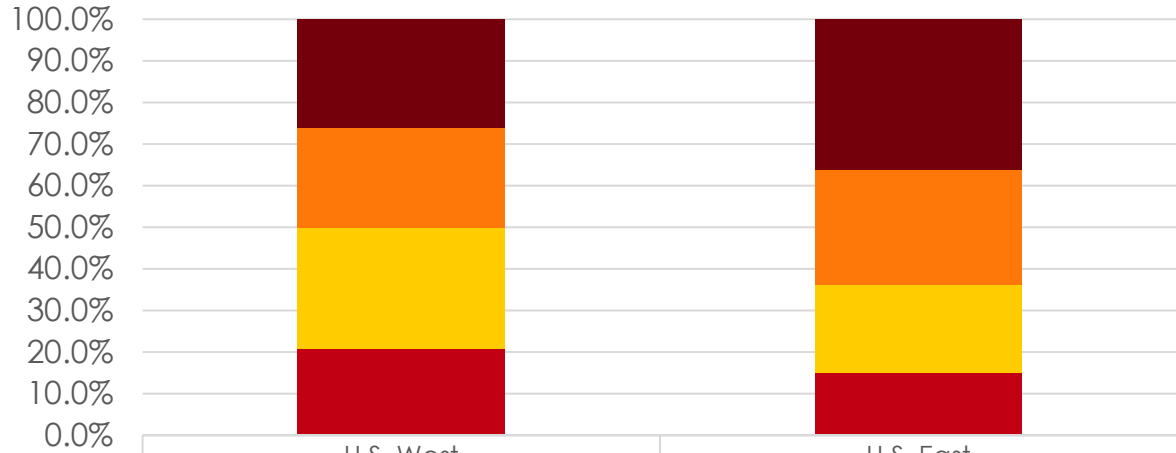
# ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
'Akaka Falls	29.3%	41.8%
Botanical Gardens	9.1%	13.7%
H.N. Greenwell Store	2.7%	5.4%
Hawai'i Volcanoes National Park	48.0%	67.7%
Hilo Farmers Market	24.2%	25.4%
Hulihe'e Palace	2.0%	3.9%
'Imiloa Astronomy Ctr	0.6%	1.3%
Kaloko Honokohau National Historical Park	10.7%	15.2%
Kona Coffee Living History Farm	5.9%	10.7%
Lili'uokalani Park and Garden	8.5%	9.8%

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

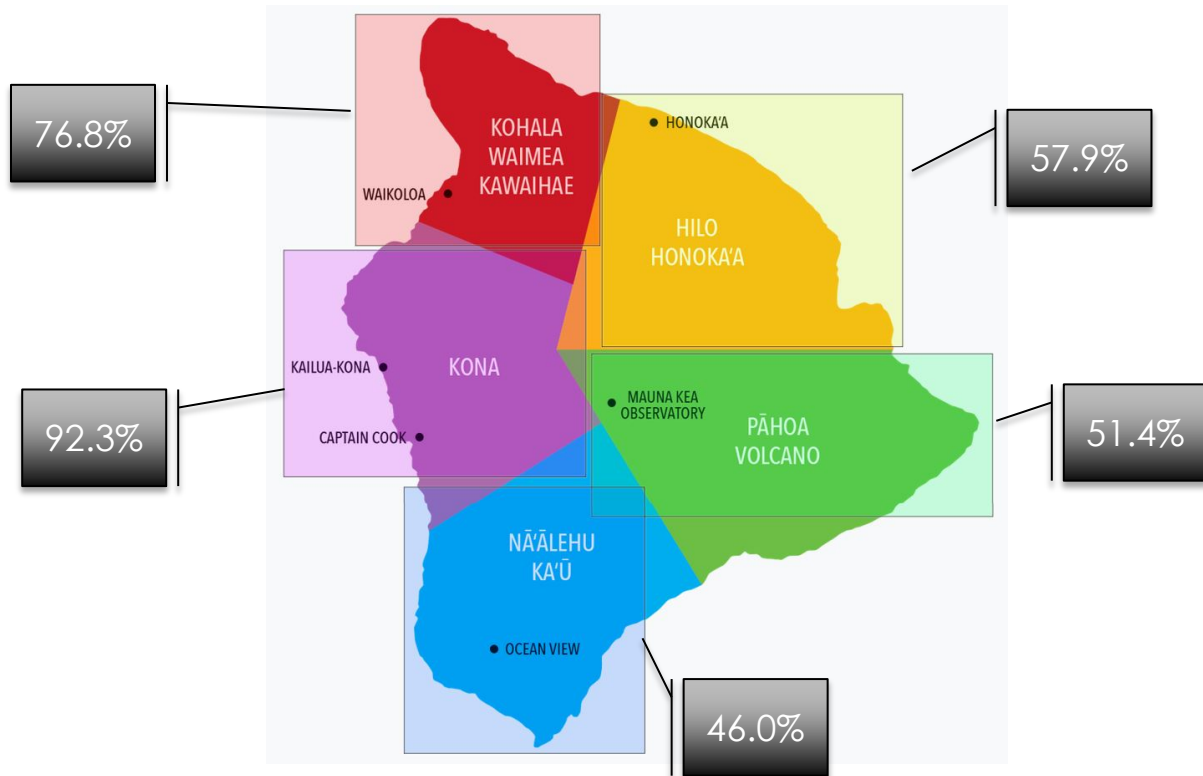
	U.S. West	U.S. East
<b>Lyman House Memorial Museum</b>	0.8%	0.4%
<b>Maunakea</b>	16.7%	26.9%
<b>Orchid Farm</b>	2.6%	3.9%
<b>Pacific Tsunami Museum</b>	1.9%	1.1%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	0.8%	0.6%
<b>Pu'uuhonua o Honaunau National Historical Park</b>	19.3%	25.1%
<b>Pu'ukohola Heia National Historical Site</b>	11.8%	12.5%
<b>Punalu'u Black Sand Beach</b>	31.0%	43.2%
<b>Rainbow Falls</b>	25.4%	42.0%
<b>Volcano Art Center</b>	6.0%	9.0%

# TRAVEL ON ISLAND OF HAWAI'I

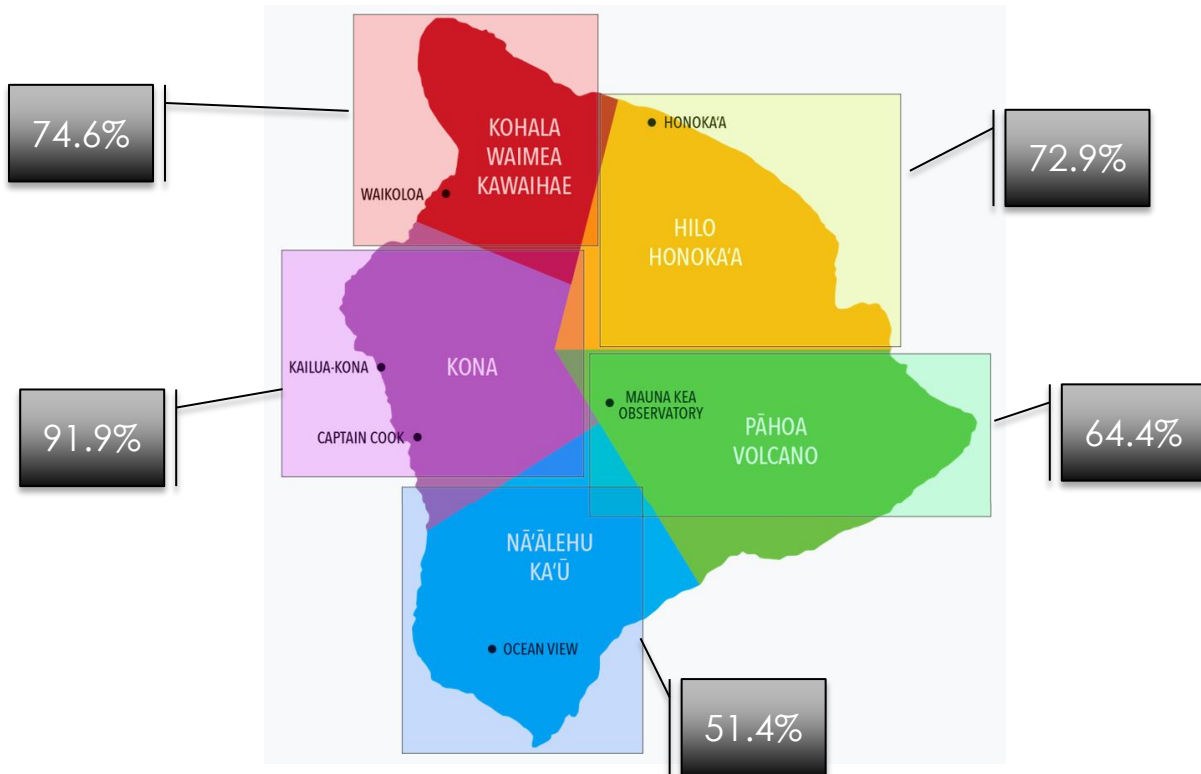


	U.S. West	U.S. East
■ Traveled to other side of island	26.0%	36.2%
■ Traveled more than 1 hour one way to reach activities	24.1%	27.6%
■ Traveled 1 hour or less one way to reach activity	29.3%	21.2%
■ Enjoy activities- short drive from accommodations	20.7%	15.0%
● BASE	492	449

# AREAS VISITED U.S. WEST

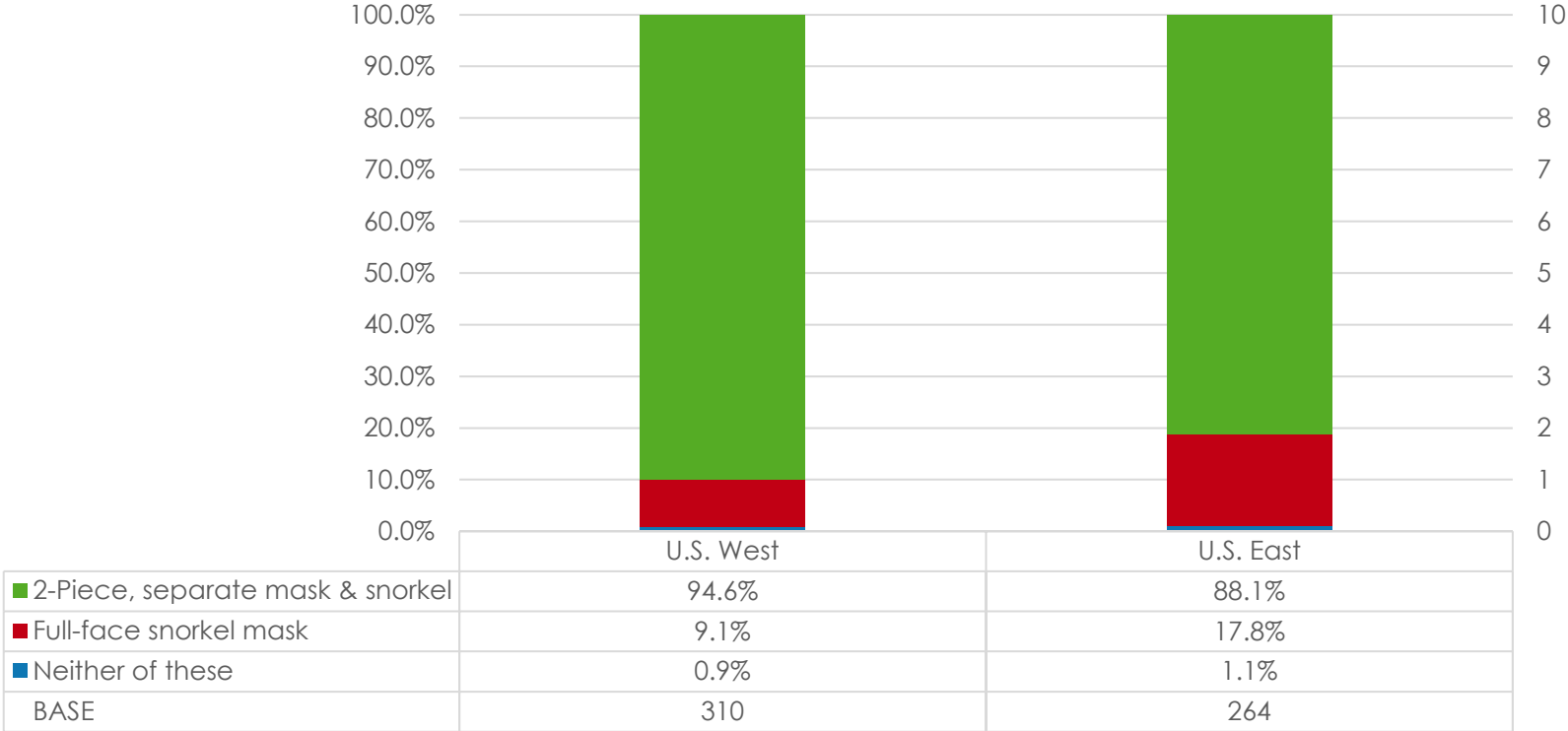


# AREAS VISITED U.S. EAST



110 Q Which of the following areas did you visit during your stay on Hawai'i Island?

# SNORKELING EQUIPMENT USED – ISLAND OF HAWAI‘I



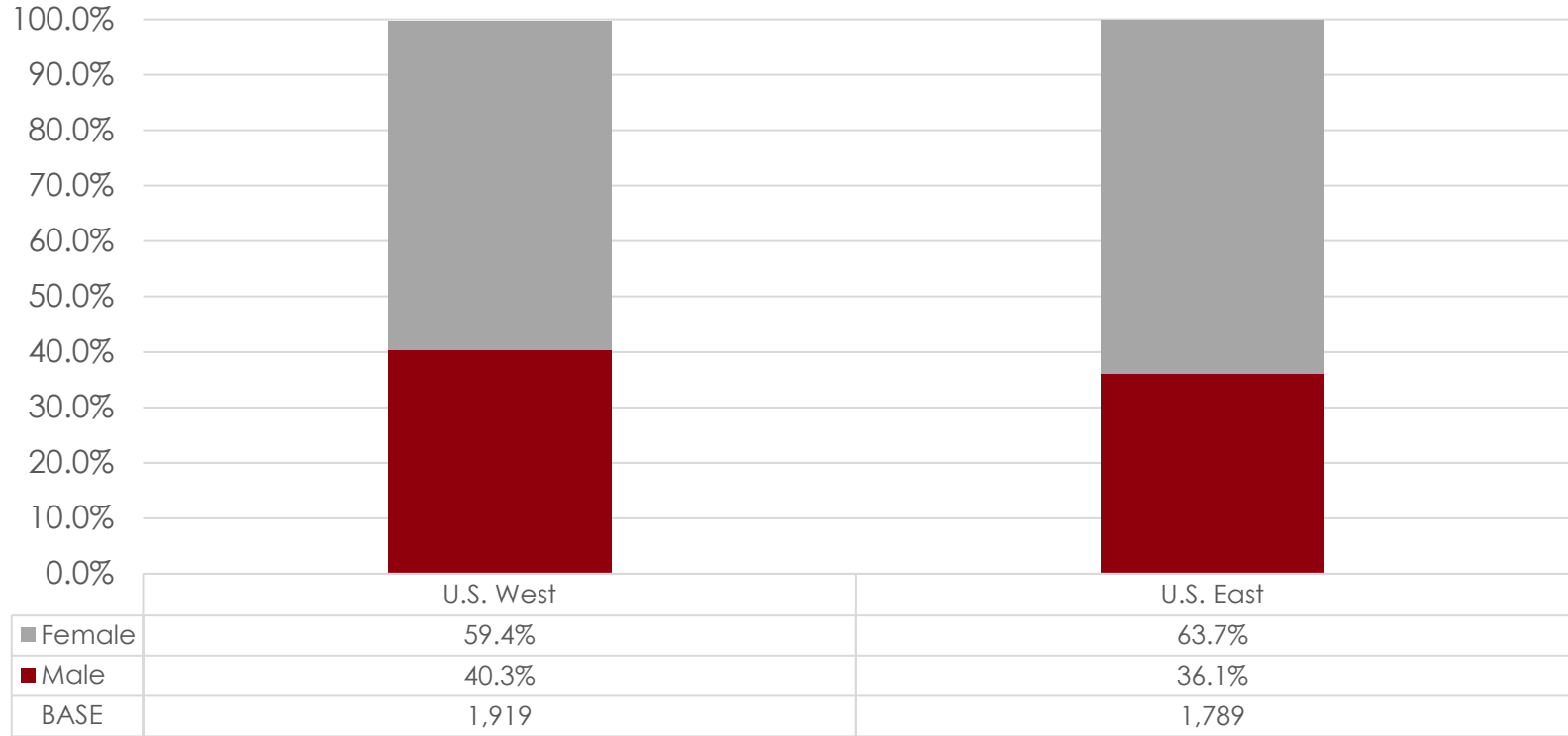
# SNORKELING OCEAN SAFETY – ISLAND OF HAWAI‘I

	U.S. West	U.S. East
<b>Did not have to be assisted or rescued</b>	98.4%	98.5%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	1.6%	1.5%
<b>Yes, needed assistance using full face mask</b>	-	-
<b>BASE</b>	307	261

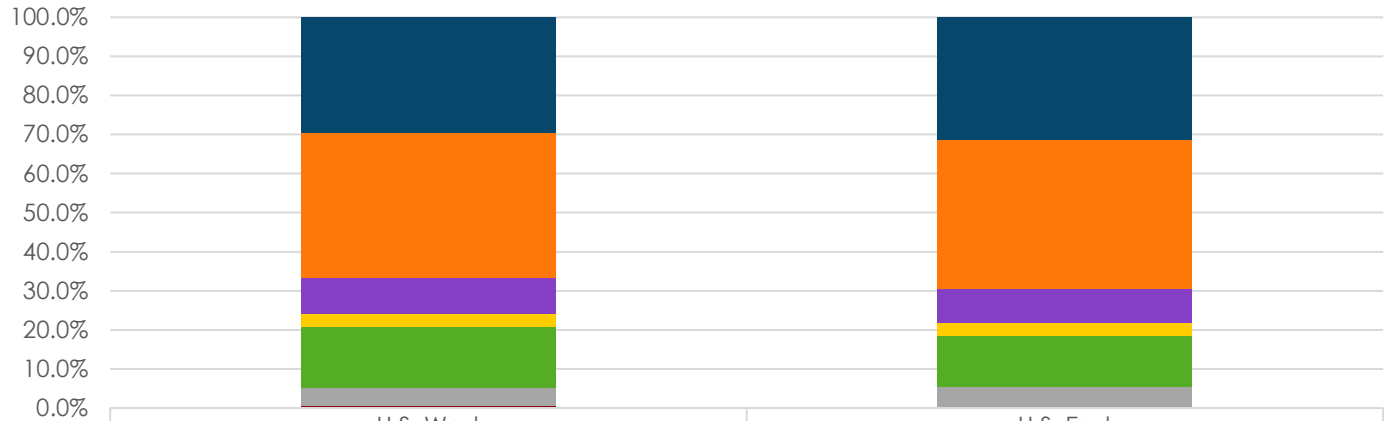


# SECTION 9 – VISITOR PROFILE

# VISITOR PROFILE – GENDER



# VISITOR PROFILE – EDUCATION

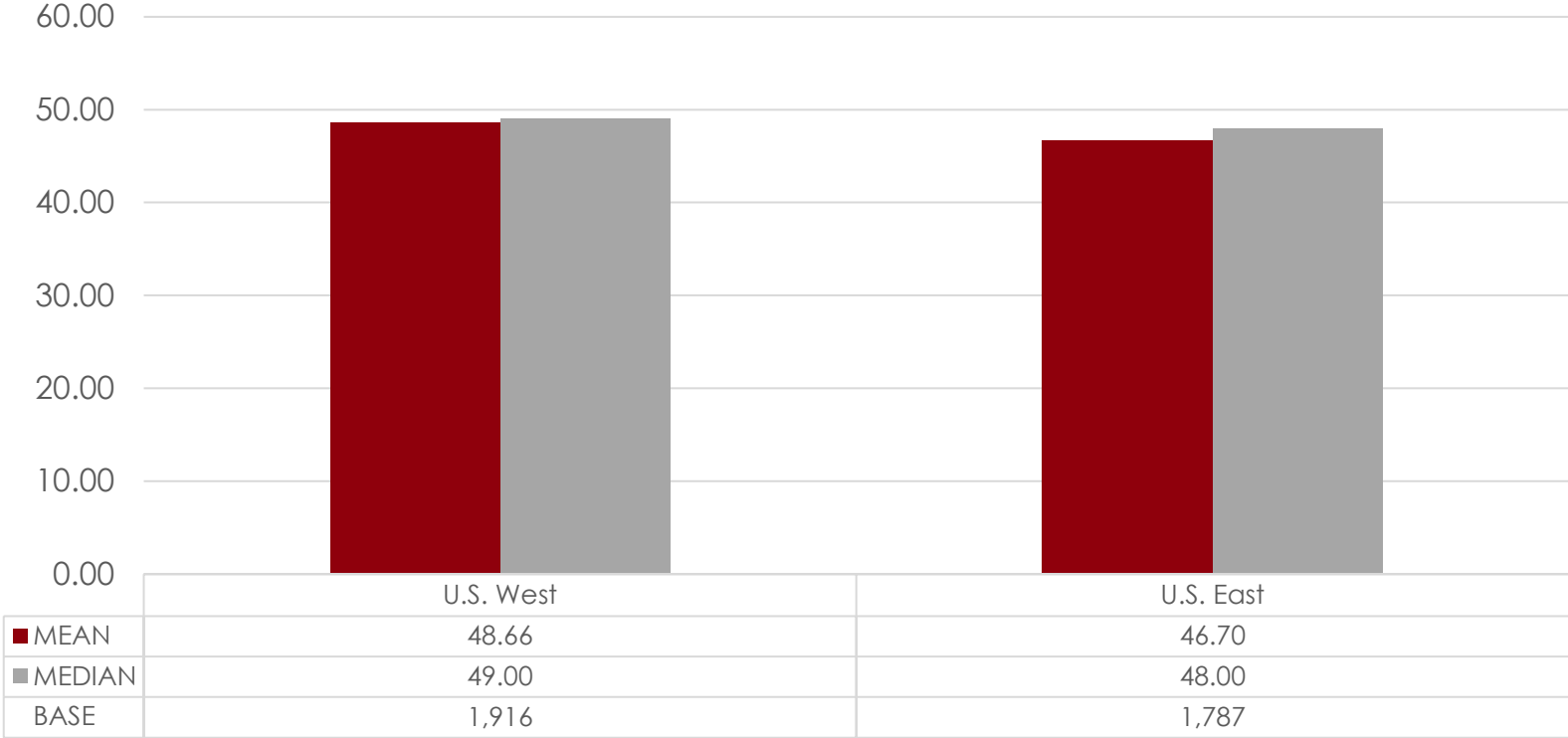


	U.S. West	U.S. East
■ Post-Graduate	29.5%	31.3%
■ College Grad	37.3%	38.0%
■ Associate Degree	9.2%	8.9%
■ Vocational/ Tech	3.3%	3.3%
■ Some College	15.5%	12.8%
■ High School Grad	4.6%	5.3%
■ Some / No High School	0.6%	0.3%
BASE	1,919	1,789

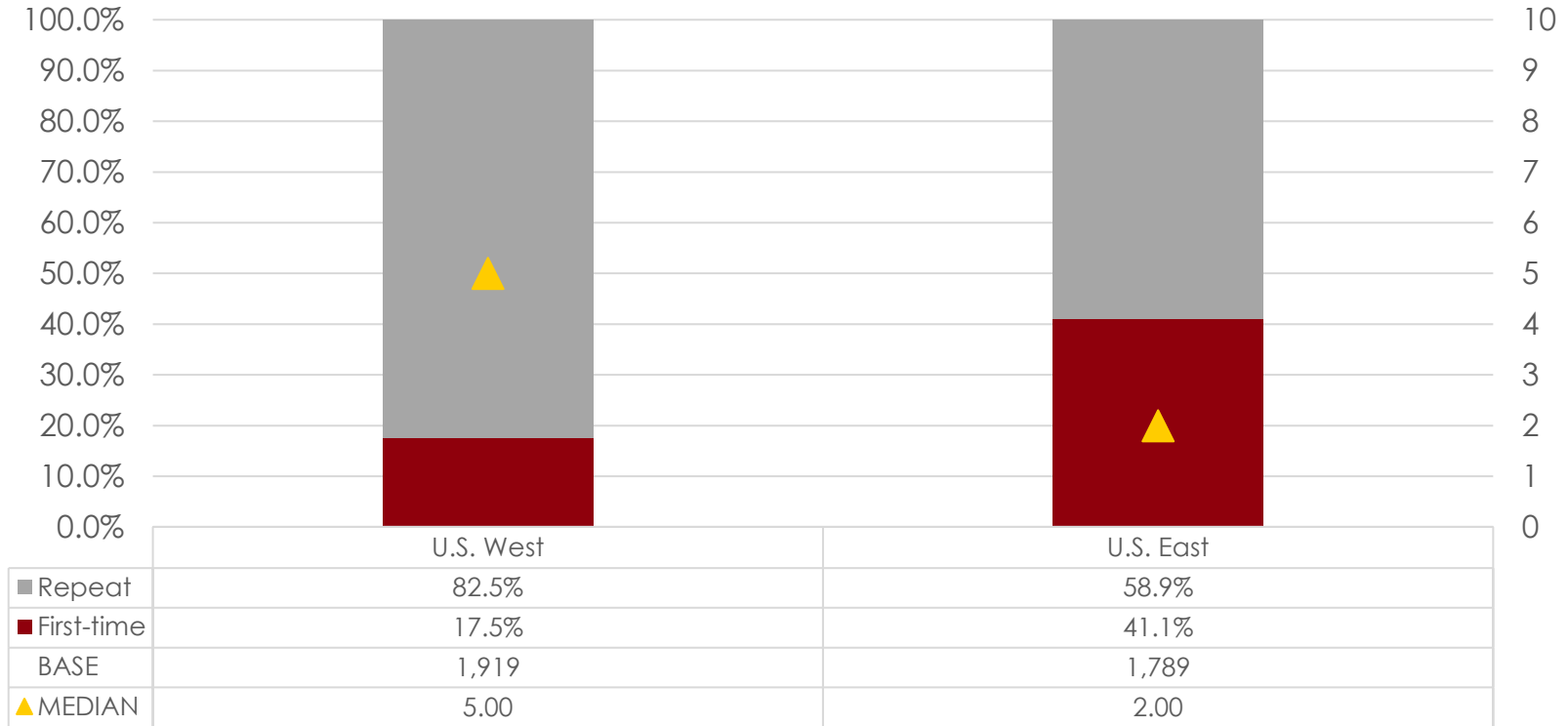
## VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East
< \$40,000	6.2%	7.2%
\$40,000 to \$59,999	5.9%	7.3%
\$60,000 to \$79,999	8.8%	10.6%
\$80,000 to \$99,999	9.2%	8.9%
\$100,000 to \$124,999	13.1%	13.6%
\$125,000 to \$149,999	11.7%	9.9%
\$150,000 to \$174,999	10.4%	8.9%
\$175,000 to \$199,999	7.3%	6.1%
\$200,000 to \$249,999	7.8%	8.2%
\$250,000 +	19.8%	19.3%

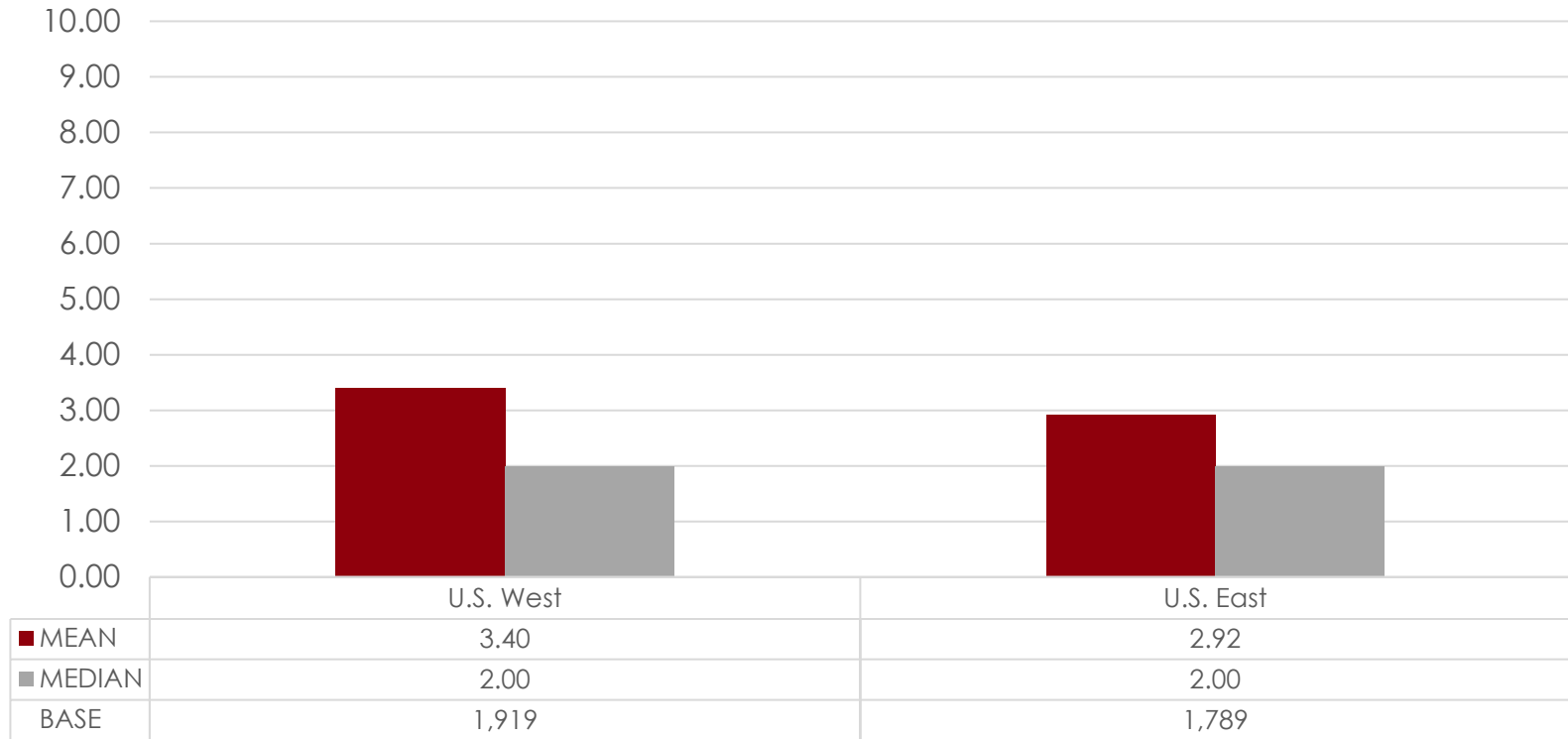
# VISITOR PROFILE – AGE



# VISITOR PROFILE – TRIPS TO HAWAI‘I



# VISITOR PROFILE – TRAVEL PARTY SIZE



# VISITOR PROFILE – TRAVEL PARTY

	U.S. West	U.S. East
Spouse	56.6%	50.8%
Other adult members of my family	23.2%	22.2%
Child/ grandchild under 18	24.3%	18.3%
Friends/ associates	18.7%	17.4%
Alone	11.8%	13.6%
Girlfriend/ boyfriend	8.4%	9.6%
Same gender partner	1.0%	1.3%



# SECTION 10 – ISLAND SURVEY METHODOLOGY

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (O‘AHU)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	703	3.70%
<b>U.S. East</b>	896	3.27%
<b>All MMAs</b>	1,599	2.45%

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	239	6.34%
<b>U.S. East</b>	185	7.21%
<b>All MMAs</b>	424	4.76%

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

# METHODOLOGY & SAMPLE SIZE – ISLAND VSAT (MAUI)

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	620	3.94%
<b>U.S. East</b>	517	4.31%
<b>All MMAs</b>	1,137	2.91%

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

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

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

<b>MMA</b>	<b>Completed</b>	<b>Margin of Error <math>\pm</math></b>
<b>U.S. West</b>	500	4.38%
<b>U.S. East</b>	464	4.55%
<b>All MMAs</b>	964	3.16%

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