

# VISITOR SATISFACTION STUDY Q2 2022

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

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# Survey Methodology

The Visitor Satisfaction and Activity Survey is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. For Quarter 2, 2022, the sampled visitor markets 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.), and Canada.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	1,697	2.38%	19.09%
U.S. East	1,879	2.26%	21.17%
Canada	852	3.36%	24.45%
All visitor markets	4,428	1.47%	17.68%

# Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were 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 visitor markets were reported as weighted data based on weights generated for Quarter 2, 2022. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

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

# Effect of COVID-19 Pandemic

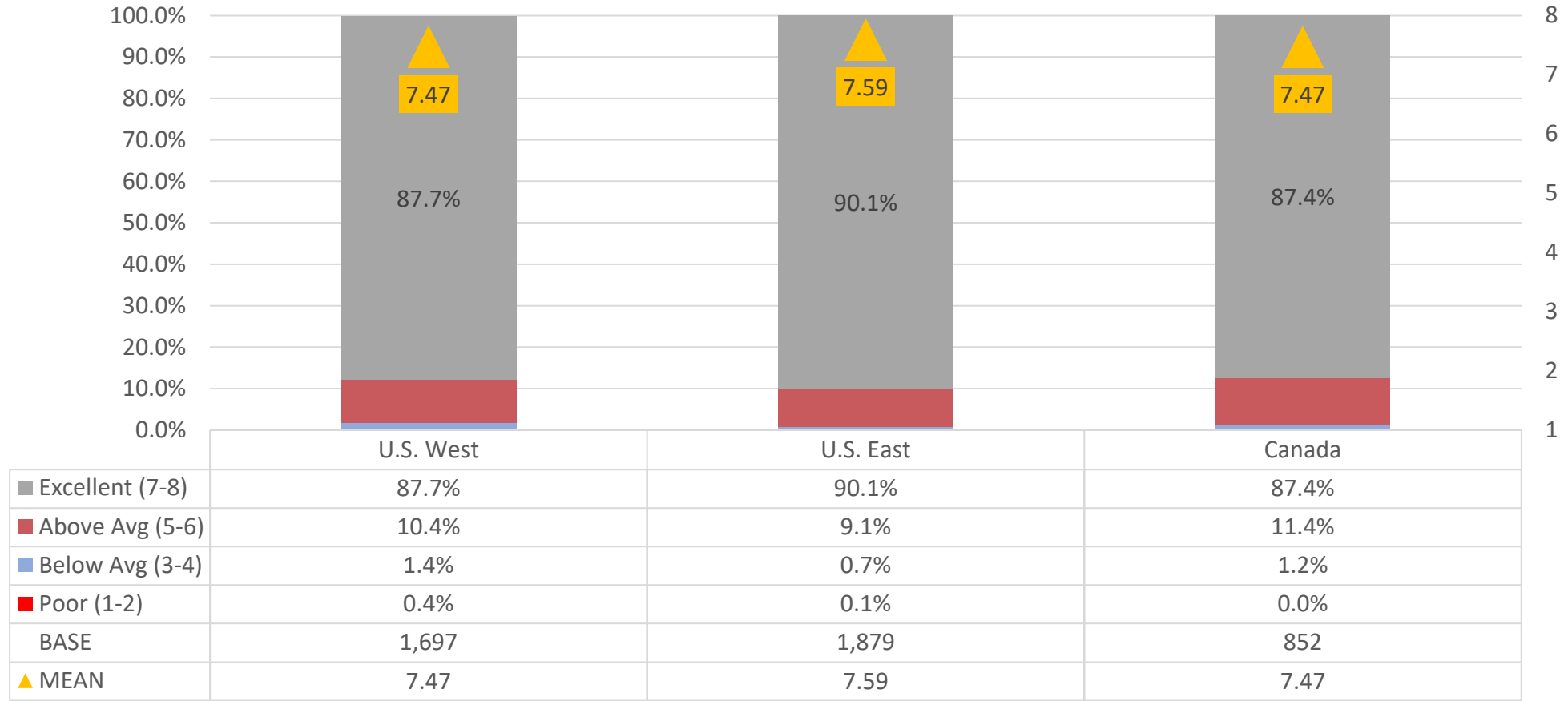
## COVID-19 Travel Restrictions

Concerns around the continuing COVID-19 pandemic have resulted in significant travel restrictions and limited flights to Hawai'i from China, Japan, Korea and Oceania. Therefore, visitors from those MMAs did not participate in the VSAT survey for this quarter.

# Section 1 – Visitor Satisfaction

# SATISFACTION - STATE OF HAWAI'I BY VISITOR MARKET

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



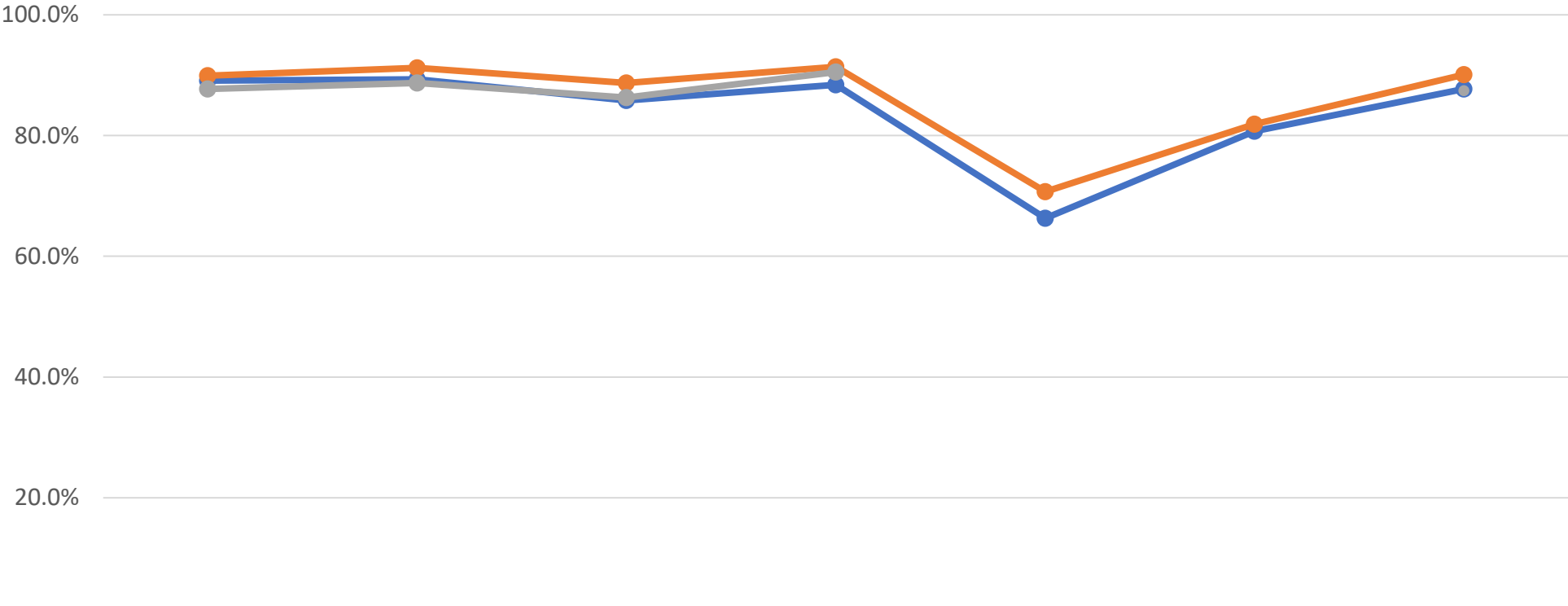
# SATISFACTION - STATE OF HAWAI'I BY VISITOR MARKET

- **Age:** For visitors from the U.S. West, satisfaction was highest amongst younger travelers or those under the age of 35, and was lowest amongst visitors between the ages of 50 and 64.
- **Gender:** Female visitors from the U.S. West and U.S. East gave statistically higher satisfaction scores than males from these visitor markets.



# SATISFACTION - STATE OF HAWAI'I BY VISITOR MARKET

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

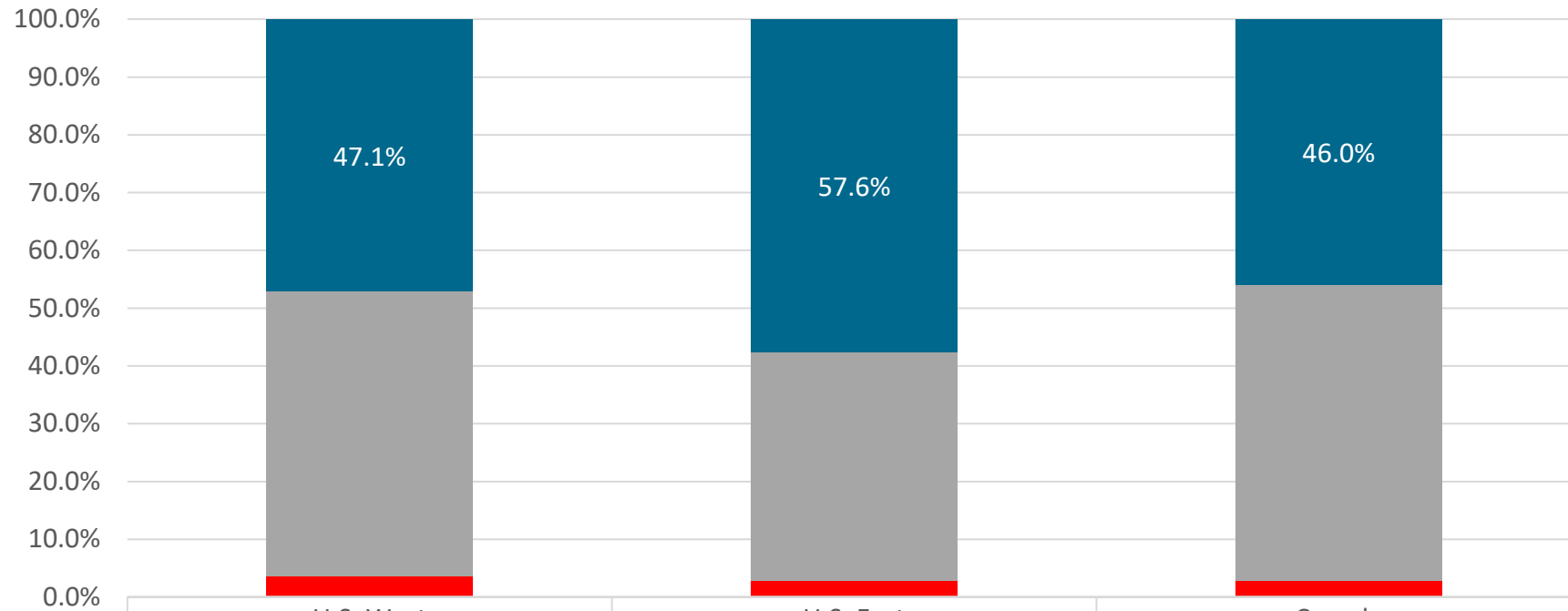


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	89.1%	89.3%	85.8%	88.4%	66.3%	80.7%	87.7%
U.S. East	89.9%	91.2%	88.7%	91.4%	70.7%	81.9%	90.1%
Canada	87.7%	88.7%	86.3%	90.5%			87.4%

P= Preliminary Data



# SATISFACTION - HAWAI'I TRIP EXPECTATIONS



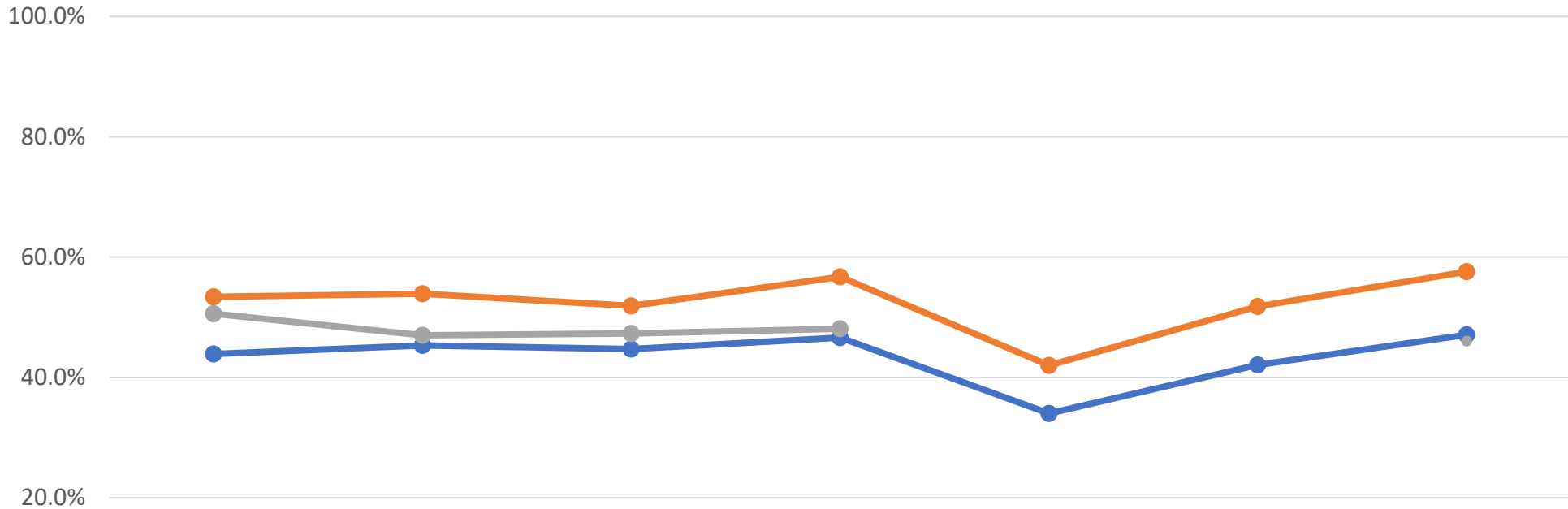
	U.S. West	U.S. East	Canada
■ Exceeded expectations	47.1%	57.6%	46.0%
■ Met expectations	49.2%	39.6%	51.1%
■ Did NOT meet expectations	3.7%	2.8%	2.9%
BASE	1,697	1,879	852

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the U.S. West, U.S. East, and Canada, were more positive about their trip in terms of expectations than repeat visitors from these markets.
- ***Age:*** Younger travelers from the U.S. West, U.S. East, and Canada gave higher satisfaction scores when asked if their trip lived up to their expectations.
- ***Gender:*** Female visitors from the U.S. West and U.S. East gave higher mean scores compared to male visitors, when asked about how their trip to the state met with their expectations prior to arrival.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

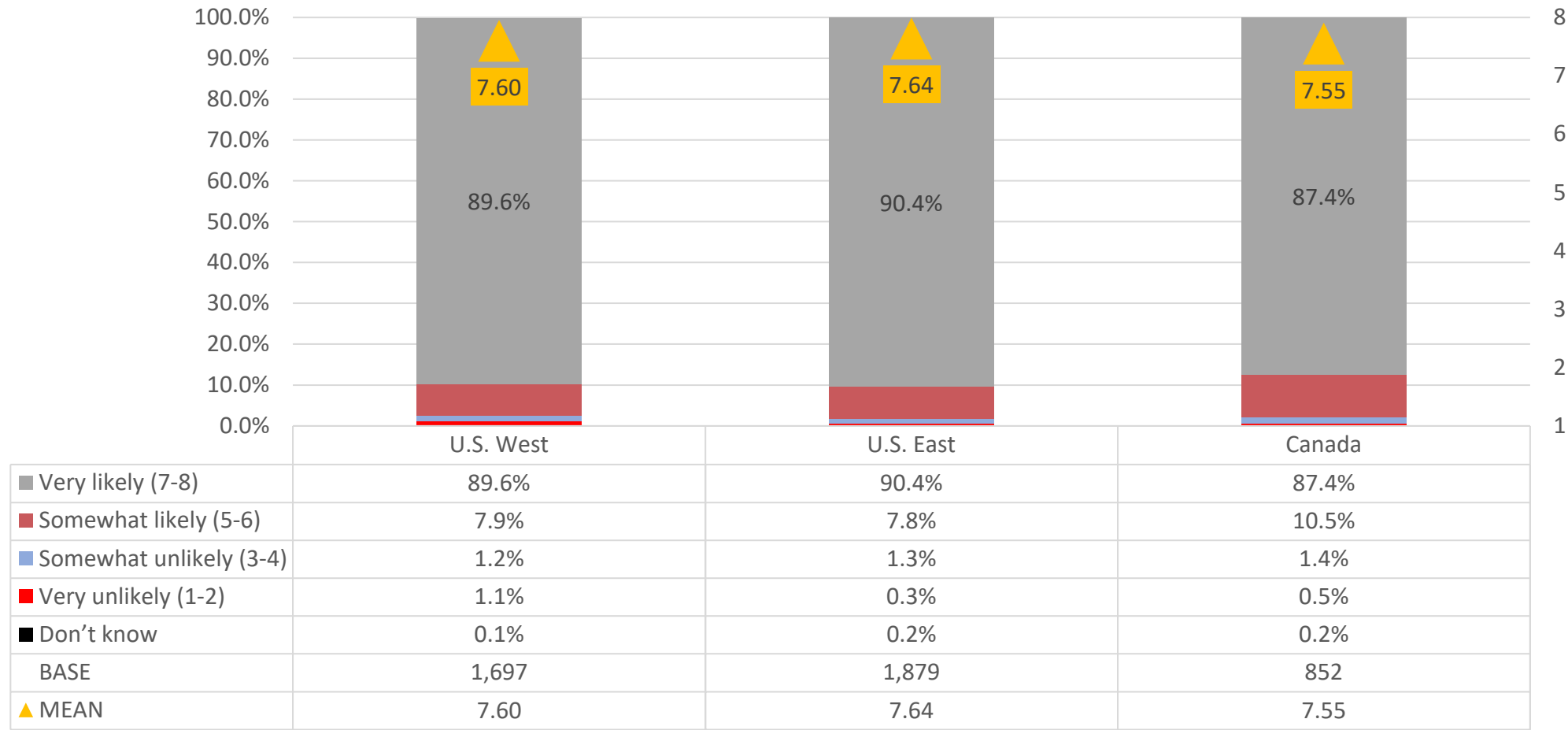
Tracking Data – Rating of “Exceeded expectations”



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	43.9%	45.3%	44.7%	46.6%	34.0%	42.1%	47.1%
U.S. East	53.4%	53.9%	51.9%	56.7%	42.0%	51.8%	57.6%
Canada	50.6%	47.0%	47.3%	48.1%			46.0%

# BRAND/ DESTINATION - ADVOCACY

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

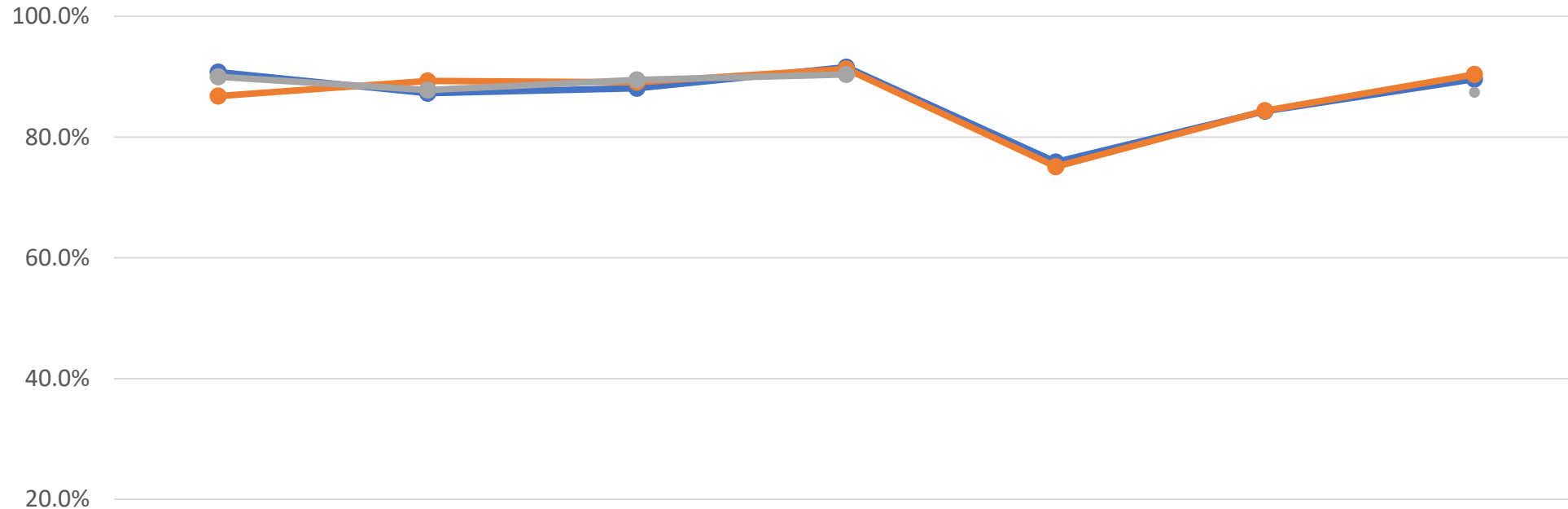


# BRAND/ DESTINATION - ADVOCACY

- **Gender:** Females from the U.S. West and U.S. East were stronger brand advocates for the state compared to males from these visitor markets.

# BRAND/ DESTINATION - ADVOCACY

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

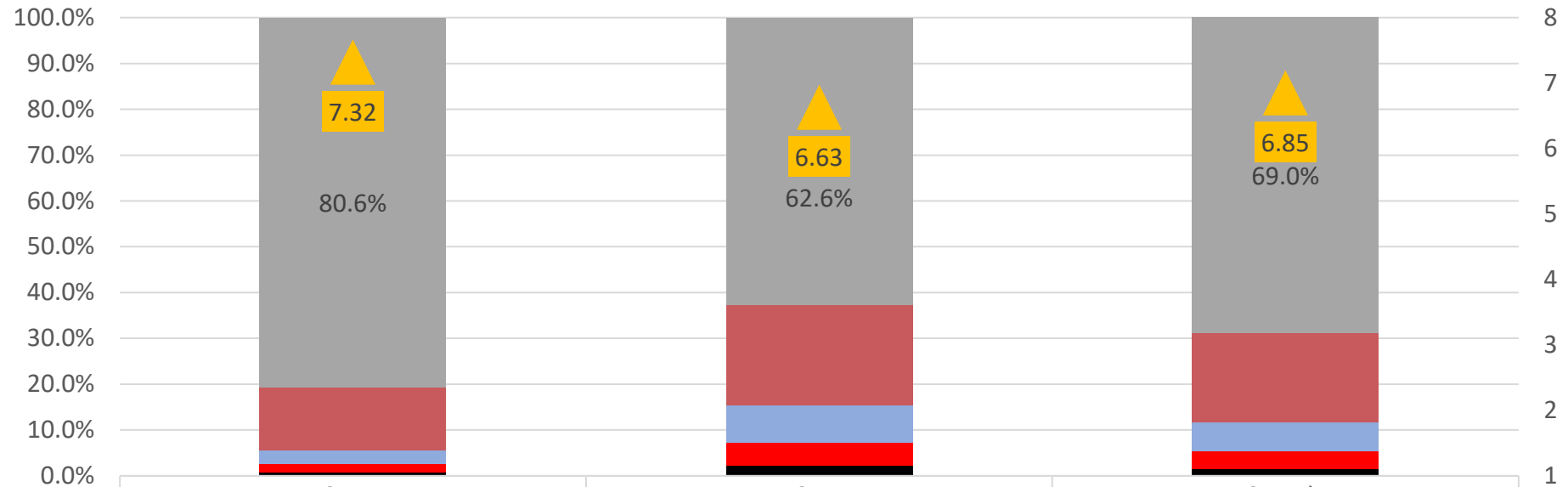


	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	90.8%	87.3%	88.1%	91.6%	75.9%	84.3%	89.6%
U.S. East	86.8%	89.3%	89.1%	91.3%	75.1%	84.4%	90.4%
Canada	90.0%	87.8%	89.5%	90.4%			87.4%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Canada
Very likely (7-8)	80.6%	62.6%	69.0%
Somewhat likely (5-6)	13.8%	22.0%	19.5%
Somewhat unlikely (3-4)	2.9%	8.2%	6.2%
Very unlikely (1-2)	1.9%	4.9%	3.9%
Don't know	0.7%	2.3%	1.5%
BASE	1,697	1,879	852
MEAN	7.32	6.63	6.85

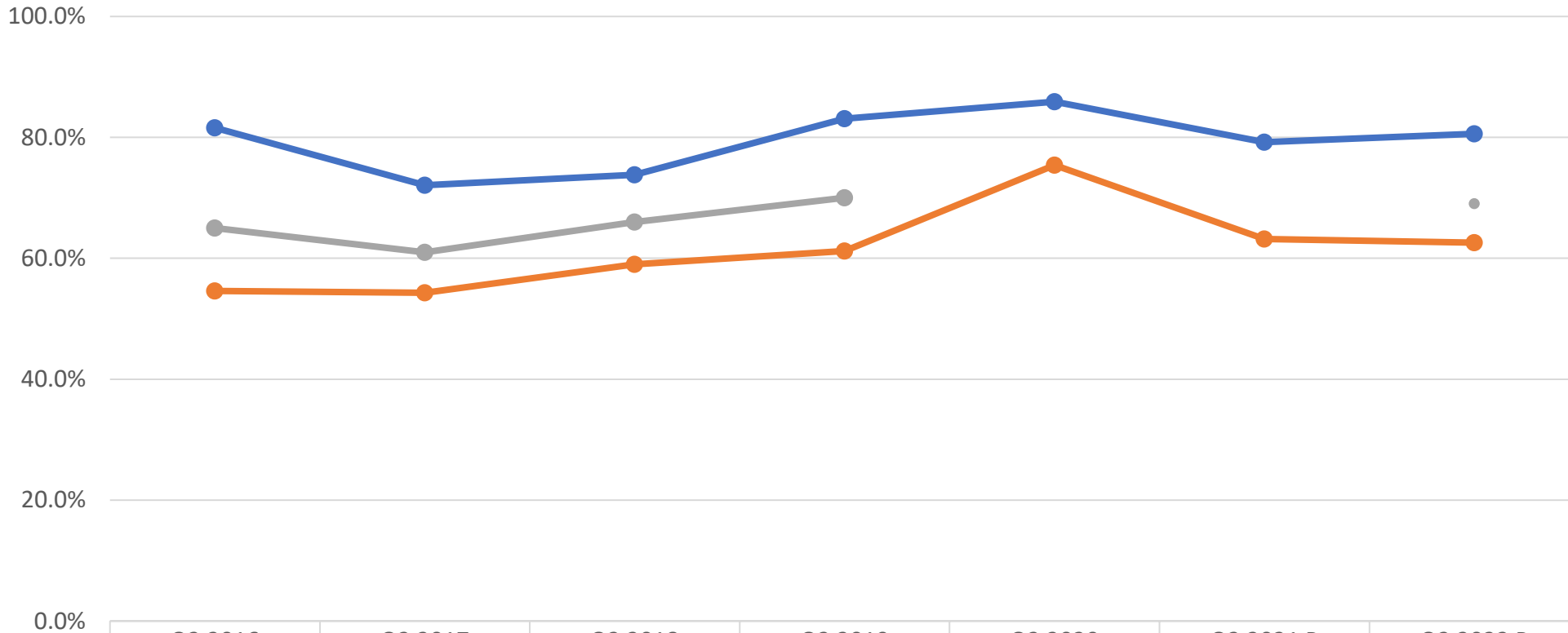


# LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the U.S. West, U.S. East, and Canada were more likely to return to the state compared to first-time visitors.
- ***Travel party size:*** Visitors from the U.S. West and U.S. East who traveled to the state by themselves appeared more likely to return to the state compared to those who came with others in their travel party.
- ***Age:*** Seniors from the U.S. East were the least likely to return to the state compared to younger travelers from this particular travel market.
- ***Islands Visited:*** Visitors from the U.S. East whose trip consisted of visiting a single island were more likely to return to the state compared to visitors from this market that stayed on multiple islands.

# LIKELIHOOD OF RETURN VISIT

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



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	81.6%	72.1%	73.8%	83.1%	85.9%	79.2%	80.6%
U.S. East	54.6%	54.3%	59.0%	61.2%	75.4%	63.2%	62.6%
Canada	65.0%	61.0%	66.0%	70.0%			69.0%

P= Preliminary Data

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

Q2 2021 P	Q2 2022 P
41.5% Too expensive	55.3% Too expensive
37.1% Want to go someplace new	36.1% Poor value
33.6% Poor value	31.9% Want to go someplace new
29.5% COVID-19	26.6% Too commercialized/ overdeveloped
20.3% Too crowded/ congested/ traffic	25.6% Too crowded/ congested/ traffic
20.2% No reason to return/ nothing new	19.1% No reason to return/ nothing new
14.4% Unfriendly people/ felt unwelcome	14.9% Unfriendly people/ felt unwelcome
11.9% Poor service	
11.5% Too commercial/ overdeveloped	
11.5% Five years is too soon	

P= Preliminary Data

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

Q2 2021 P	Q2 2022 P
47.0% Too expensive	54.8% Too expensive
32.5% Want to go someplace new	41.9% Flight too long
32.2% Flight too long	39.9% Want to go someplace new
20.9% COVID-19	19.4% Five years is too soon
17.8% Too crowded/ congested/ traffic	14.0% Poor value
16.5% Poor value	13.4% Too crowded/ congested/ traffic
14.5% Unfriendly people/ felt unwelcome	11.7% Other financial obligations
12.5% Too commercialized/ overdeveloped	10.3% Too commercialized/ overdeveloped
11.6% Five years is too soon	
10.4% Poor service	

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

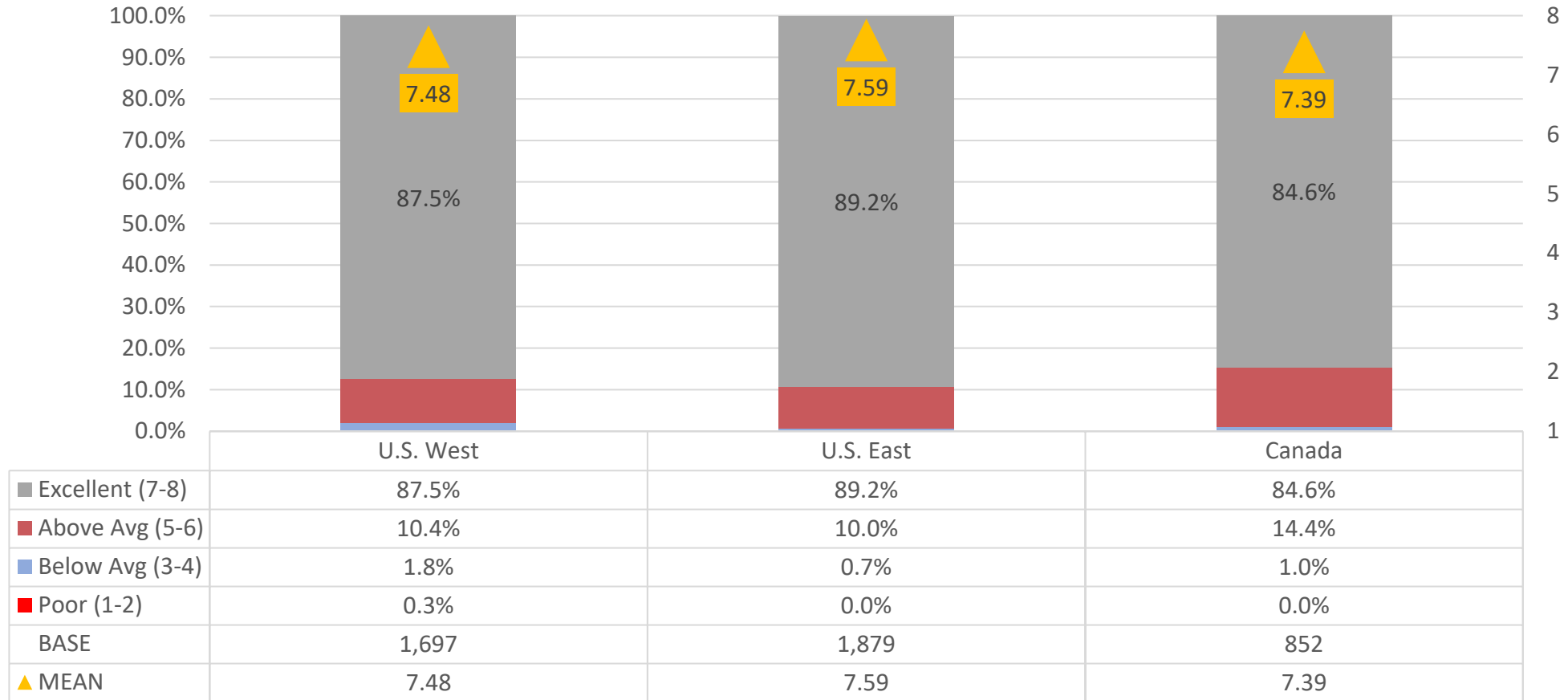
Q2 2019*	Q1 2022 P
54.9% Too expensive	60.3% Too expensive
45.4% Want to go someplace new	44.7% Want to go someplace new
40.2% Flight too long	36.0% Flight too long
24.0% Five years is too soon	21.9% Poor value
22.2% Poor value	21.0% Five years is too soon
16.4% Too commercialized/ overdeveloped	18.0% Too crowded/ congested/ traffic
13.5% Too crowded/ congested/ traffic	14.4% Other financial obligations
11.6% Other financial obligations	13.2% No compelling reason to return
10.4% No compelling reason to return	10.9% Too commercialized/ overdeveloped

\*Note: Canadian visitors were not sampled in 2020 & 2021 due to low visitor counts as a result of the pandemic.

P= Preliminary Data

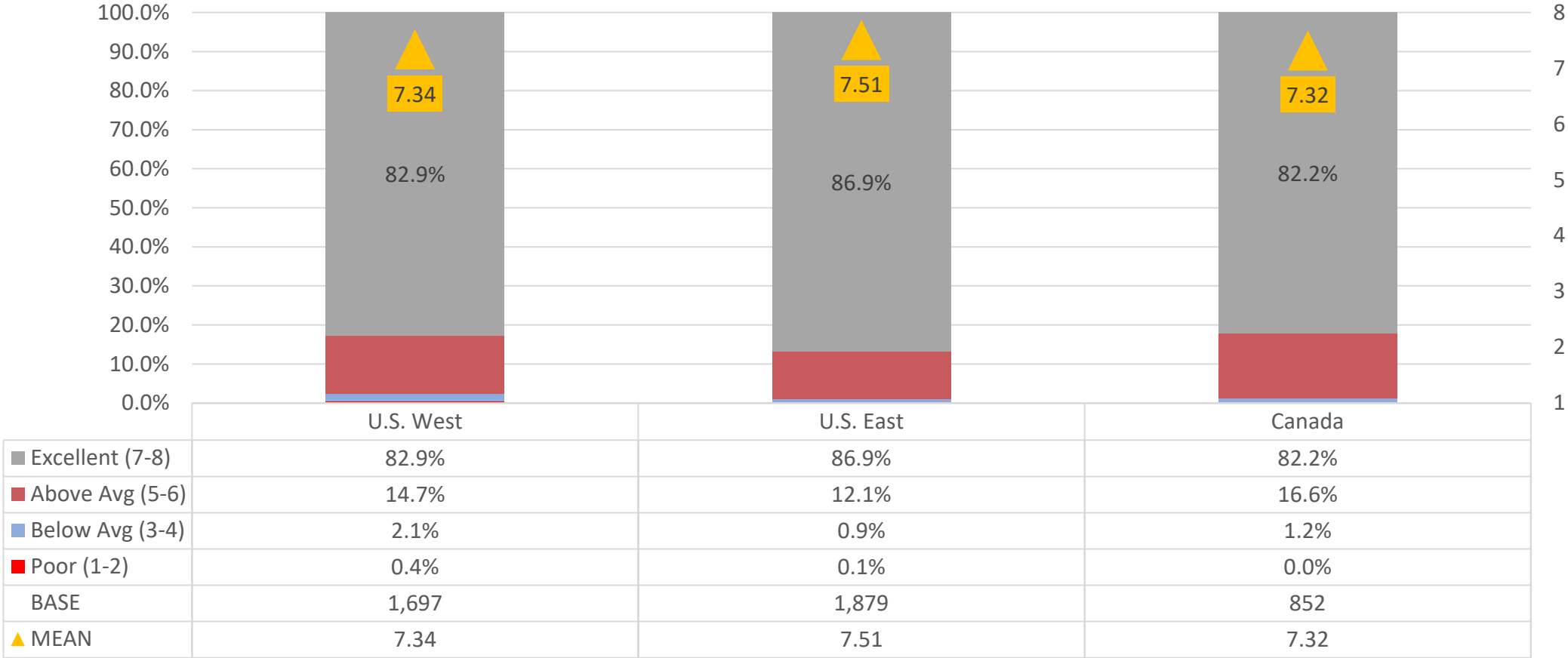
# OFFERING A VARIETY OF EXPERIENCES

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



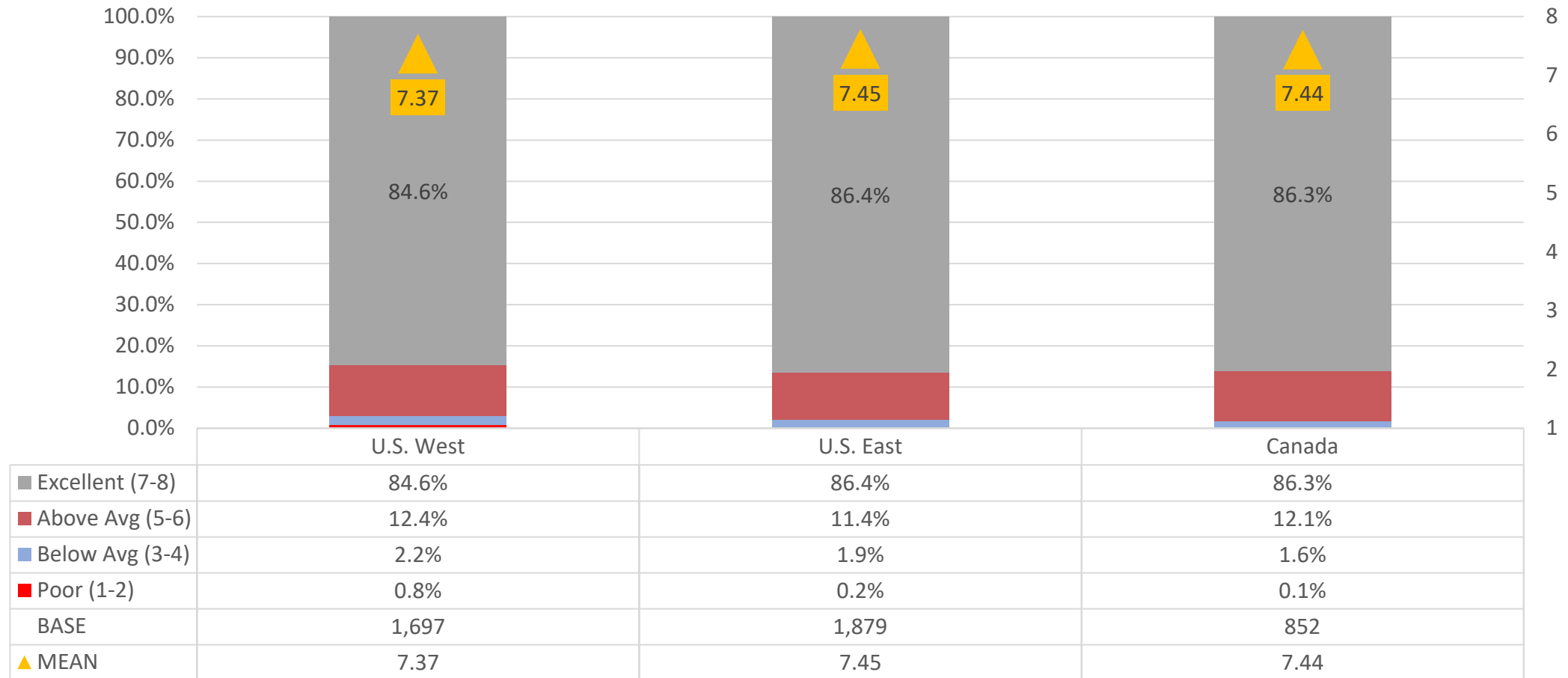
# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



# SAFE AND SECURE DESTINATION

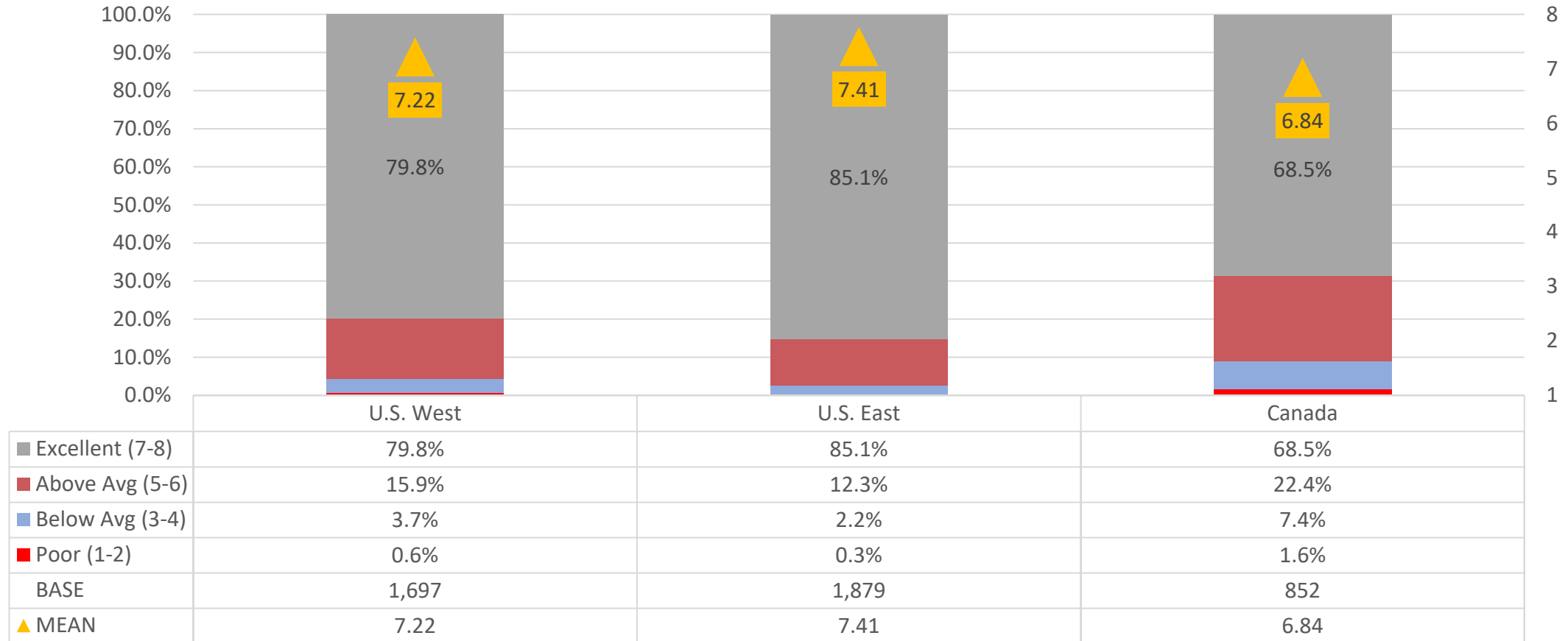
8-pt Rating Scale  
8=Excellent/ 1=Poor





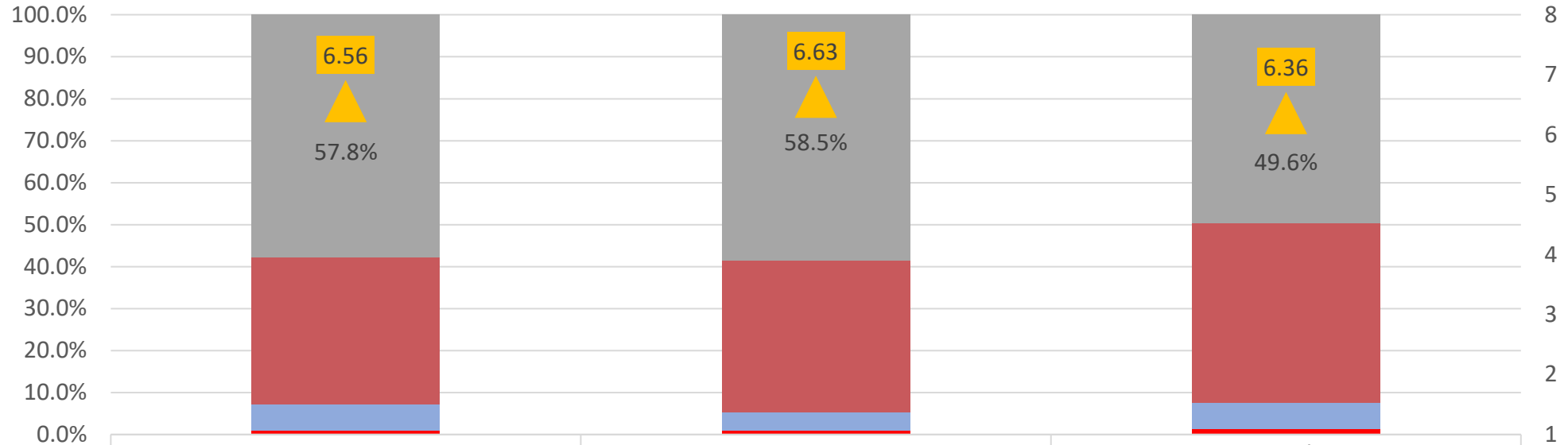
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



# VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



	U.S. West	U.S. East	Canada
■ Excellent (7-8)	57.8%	58.5%	49.6%
■ Above Avg (5-6)	35.0%	36.2%	42.9%
■ Below Avg (3-4)	6.2%	4.3%	6.1%
■ Poor (1-2)	1.0%	1.0%	1.4%
BASE	1,697	1,879	852
▲ MEAN	6.56	6.63	6.36

# Section 2 – Activities

# ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	97.2%	97.7%	97.8%
<b>On own (self guided)</b>	84.8%	82.1%	84.9%
<b>Helicopter/ airplane</b>	3.3%	6.3%	6.0%
<b>Boat/ submarine/ whale</b>	27.6%	35.6%	28.0%
<b>Visit towns/communities</b>	53.1%	54.8%	60.1%
<b>Limo/ van/ bus tour</b>	7.2%	16.1%	9.3%
<b>Scenic views/ natural landmark</b>	59.6%	70.9%	68.6%
<b>Movie/ TV/ film location</b>	5.1%	6.7%	5.8%

# ACTIVITIES - RECREATION

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	98.1%	98.1%	99.1%
<b>Beach/ sunbathing</b>	88.6%	88.0%	92.0%
<b>Bodyboarding</b>	14.0%	8.2%	12.9%
<b>Standup paddle board</b>	7.8%	4.7%	5.6%
<b>Surfing</b>	7.6%	7.5%	11.1%
<b>Canoeing/ kayak</b>	7.7%	7.7%	9.8%
<b>Swim in the ocean</b>	69.7%	70.9%	76.4%
<b>Snorkeling</b>	50.1%	48.5%	52.4%
<b>Freediving</b>	2.2%	1.8%	1.5%
<b>Windsurf/ Kitesurf</b>	0.4%	0.1%	0.1%
<b>Jet ski/ Parasail</b>	2.4%	2.2%	1.8%
<b>Scuba diving</b>	2.5%	3.4%	3.6%
<b>Fishing</b>	3.2%	2.8%	1.7%
<b>Golf</b>	6.0%	6.4%	9.4%

# ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	98.1%	98.1%	99.1%
<b>Run/ Jog/ Fitness walk</b>	27.1%	25.9%	32.1%
<b>Cycling</b>	2.9%	3.4%	7.5%
<b>Spa</b>	8.8%	9.2%	6.2%
<b>Hiking</b>	47.7%	56.8%	57.7%
<b>Backpack/ camp</b>	2.0%	2.1%	2.5%
<b>Agritourism</b>	13.0%	15.8%	12.3%
<b>Sport event/ tournament</b>	1.1%	0.6%	1.3%
<b>Park/ botanical garden</b>	37.5%	43.9%	41.7%
<b>Waterpark</b>	1.5%	1.3%	1.7%
<b>Mountain tube/ waterfall rappel</b>	1.8%	1.9%	1.4%
<b>Zip lining</b>	4.8%	5.4%	3.8%
<b>Skydiving</b>	0.3%	0.4%	0.6%
<b>All terrain vehicle (ATV)</b>	3.1%	5.2%	3.5%
<b>Horseback riding</b>	1.4%	1.9%	2.0%

# ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	99.1%	98.9%	99.8%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	23.1%	28.1%	22.4%
<b>Live music/ stage show</b>	30.3%	36.3%	29.0%
<b>Nightclub/ dancing/ bar/ karaoke</b>	8.2%	7.8%	6.7%
<b>Fine dining</b>	46.8%	51.7%	49.0%
<b>Family restaurant</b>	66.1%	62.1%	59.8%
<b>Fast food</b>	38.2%	36.1%	44.4%
<b>Food truck</b>	45.2%	46.0%	44.0%
<b>Café/ coffee house</b>	52.2%	49.7%	57.8%
<b>Ethnic dining</b>	28.0%	31.1%	24.8%
<b>Farm to table cuisine</b>	16.9%	19.7%	14.3%
<b>Prepared own meal</b>	47.8%	38.4%	55.5%

# ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	98.1%	97.5%	98.5%
<b>Mall/ department store</b>	43.9%	41.5%	54.1%
<b>Designer boutique</b>	18.2%	19.9%	21.9%
<b>Hotel/ resort store</b>	35.5%	41.6%	32.3%
<b>Swap meet/ flea market</b>	16.6%	15.1%	11.8%
<b>Discount/ outlet store</b>	14.2%	14.3%	18.1%
<b>Supermarket</b>	64.9%	56.8%	65.0%
<b>Farmer's market</b>	38.6%	32.9%	41.2%
<b>Convenience store</b>	51.8%	54.2%	55.1%
<b>Duty free store</b>	4.4%	5.7%	5.2%
<b>Hawai'i made products</b>	48.6%	50.1%	46.7%
<b>Local shop/ artisan</b>	59.3%	64.5%	61.9%



# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Canada
<b>TOTAL</b>	70.5%	79.0%	68.5%
<b>Historic military site</b>	15.5%	27.6%	16.2%
<b>Historic Hawaiian site</b>	30.4%	38.8%	31.9%
<b>Other historical site</b>	13.0%	14.3%	13.5%
<b>Art museums</b>	3.3%	2.9%	3.1%
<b>Art gallery/ exhibition</b>	11.8%	10.8%	12.2%
<b>Luau/ Polynesian show/ hula show</b>	30.0%	43.3%	25.8%
<b>Lesson ex. ukulele, hula, canoe, lei making</b>	4.6%	6.3%	3.3%
<b>Play/ concert/ theatre</b>	2.4%	1.8%	2.9%
<b>Art/ craft fair</b>	10.4%	9.6%	9.5%
<b>Festival event</b>	3.7%	4.1%	2.4%

# ACTIVITIES - TRANSPORTATION

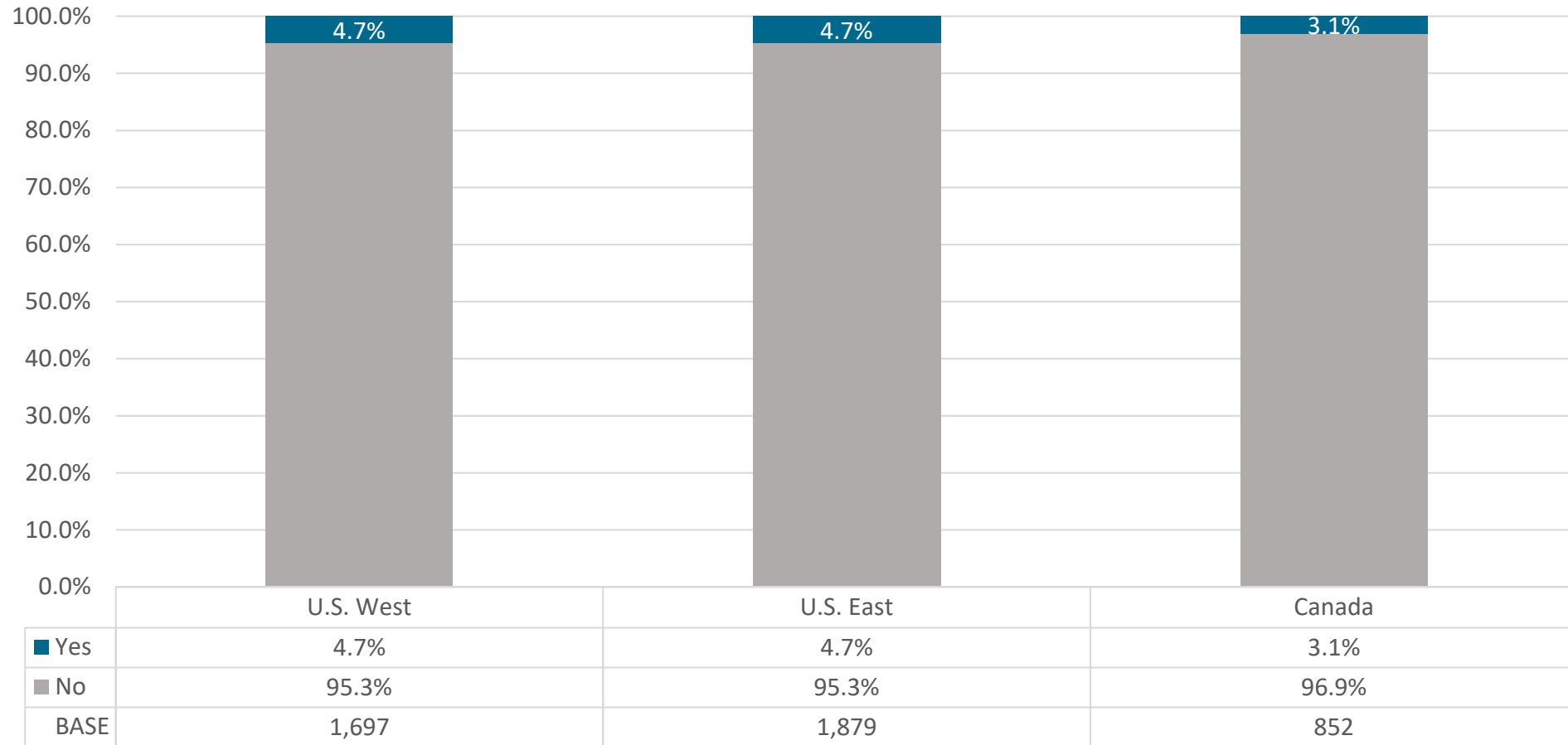
	U.S. West	U.S. East	Canada
<b>TOTAL</b>	94.7%	94.8%	95.9%
<b>Airport shuttle</b>	14.9%	15.2%	18.0%
<b>Trolley</b>	3.5%	3.7%	4.3%
<b>Public bus</b>	3.8%	4.5%	8.4%
<b>Tour bus/ tour van</b>	7.5%	15.7%	8.9%
<b>Taxi/ limo</b>	6.5%	11.5%	15.5%
<b>Rental car</b>	75.4%	72.0%	74.8%
<b>Ride share</b>	17.4%	21.4%	19.2%
<b>Car share</b>	7.4%	6.2%	5.8%
<b>Bicycle rental</b>	2.5%	1.8%	3.7%

# ACTIVITIES - OTHER

	U.S. West	U.S. East	Canada
TOTAL	31.0%	26.1%	25.4%
Visit friends/ family	28.0%	23.0%	22.2%
Volunteer non profit	3.9%	3.8%	4.2%

# Section 3 – Travelers with Disabilities

# DISABLED TRAVELER - REQUIRED ASSISTANCE

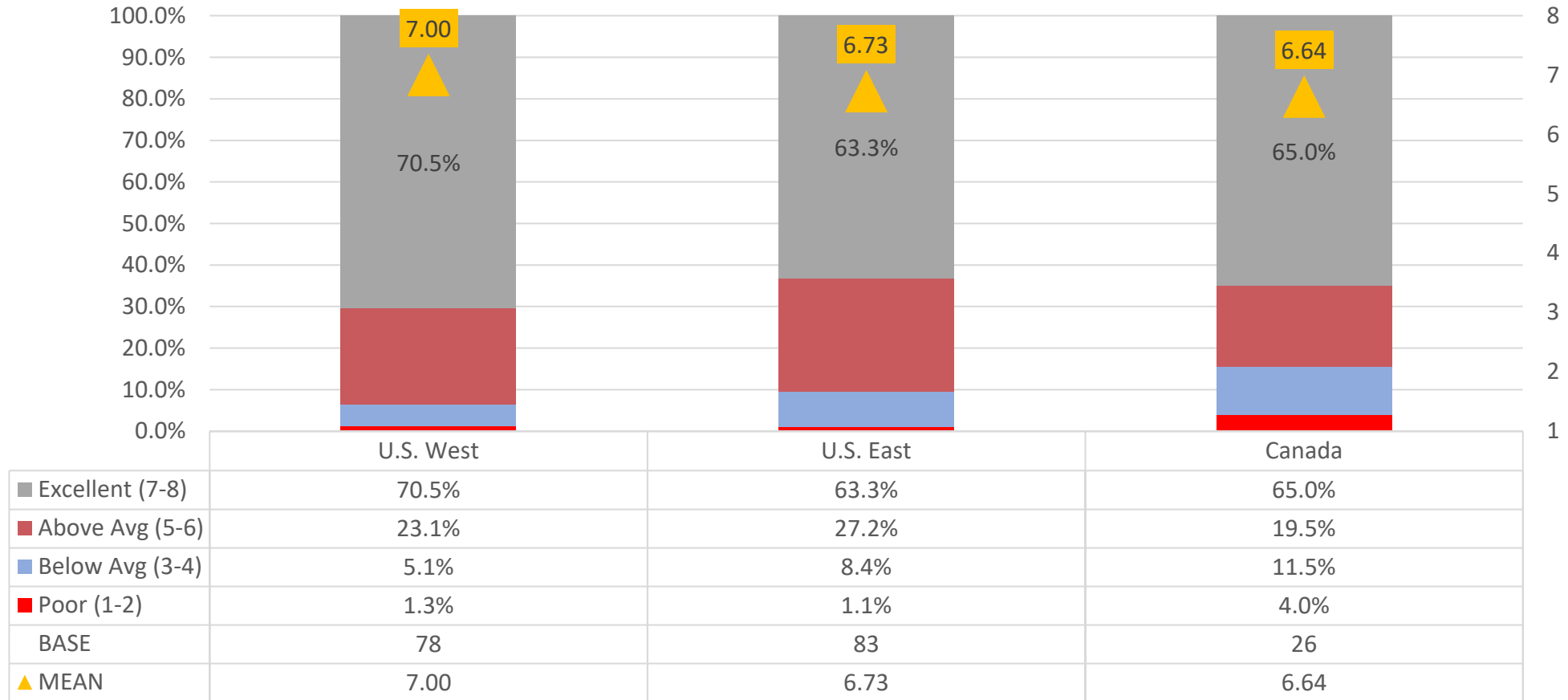


# DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Canada
<b>Mobility aid</b>	68.7%	65.2%	70.0%
<b>Personal assistance</b>	26.3%	17.5%	12.0%
<b>Other</b>	8.8%	6.8%	15.0%
<b>NA No one needed assistance</b>	6.2%	7.0%	3.5%
<b>Orientation and Mobility Assistance</b>	2.5%	1.2%	7.5%
<b>Lift equipped van</b>	1.3%	1.2%	11.5%
<b>ASL Interpreter/ texting/ captioning</b>	1.2%	1.0%	0.0%
<b>Ambulance/ Hospital/ Medical visit</b>	0.0%	1.2%	0.0%
<b>Print material in alternate format</b>	0.0%	1.2%	0.0%
<b>BASE</b>	80	87	26

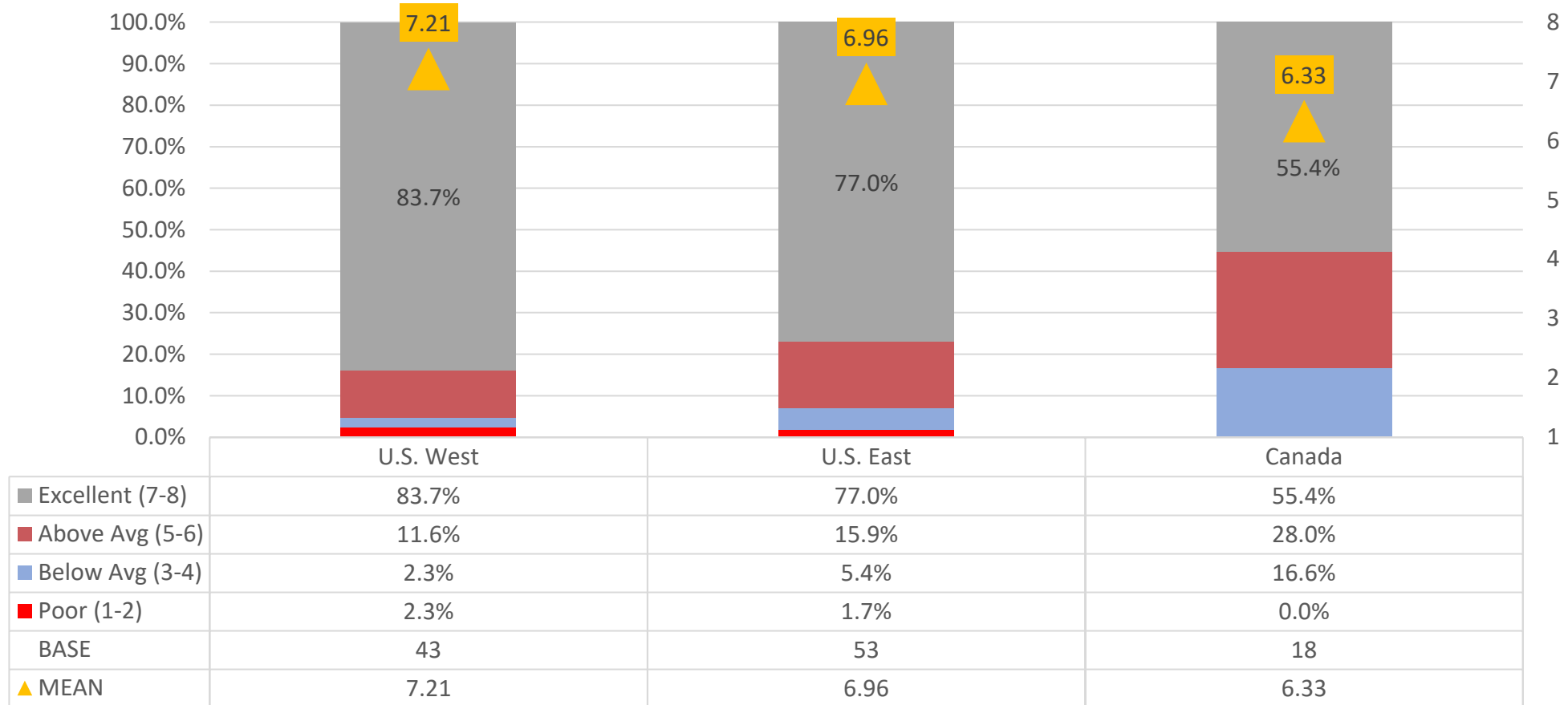
# OVERALL ACCESSIBILITY - AIRPORTS

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



# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

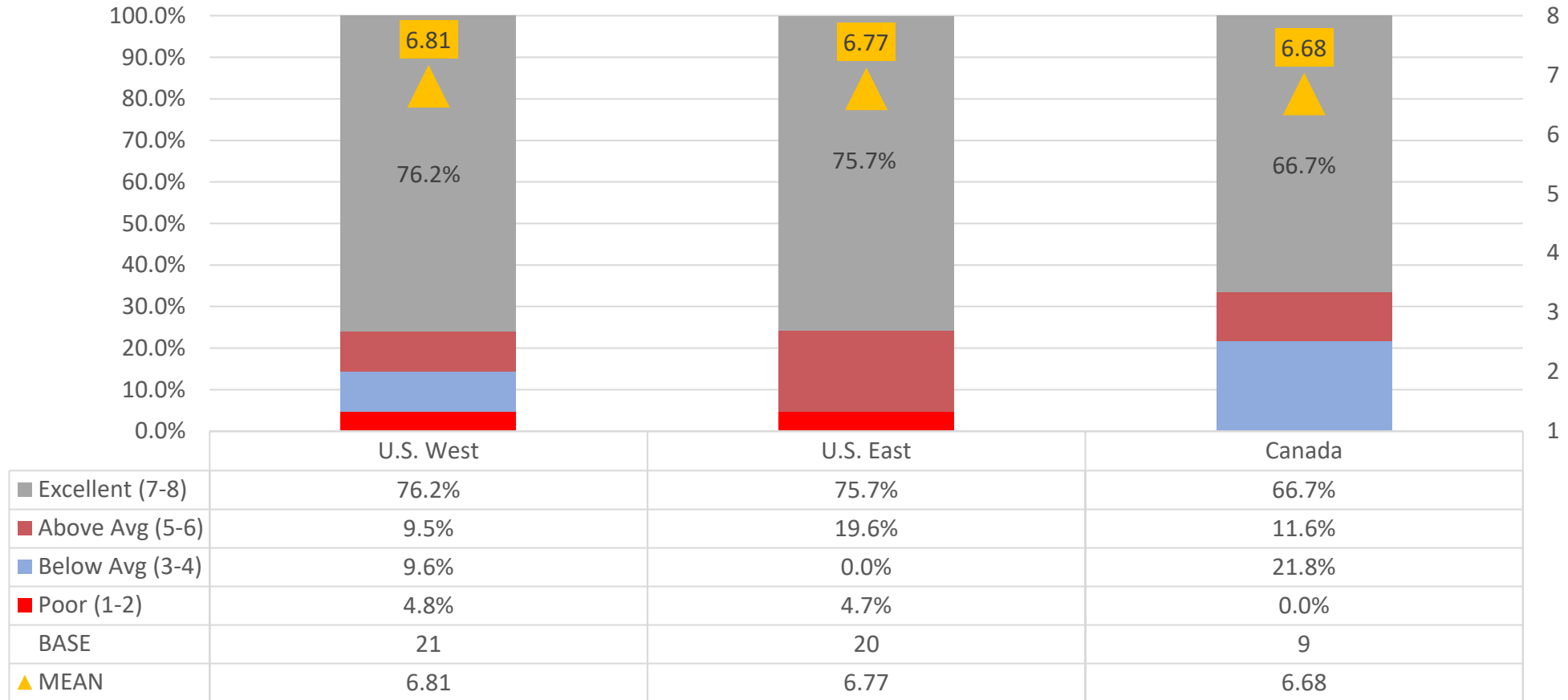
8-pt Rating Scale  
8=Excellent/ 1=Poor





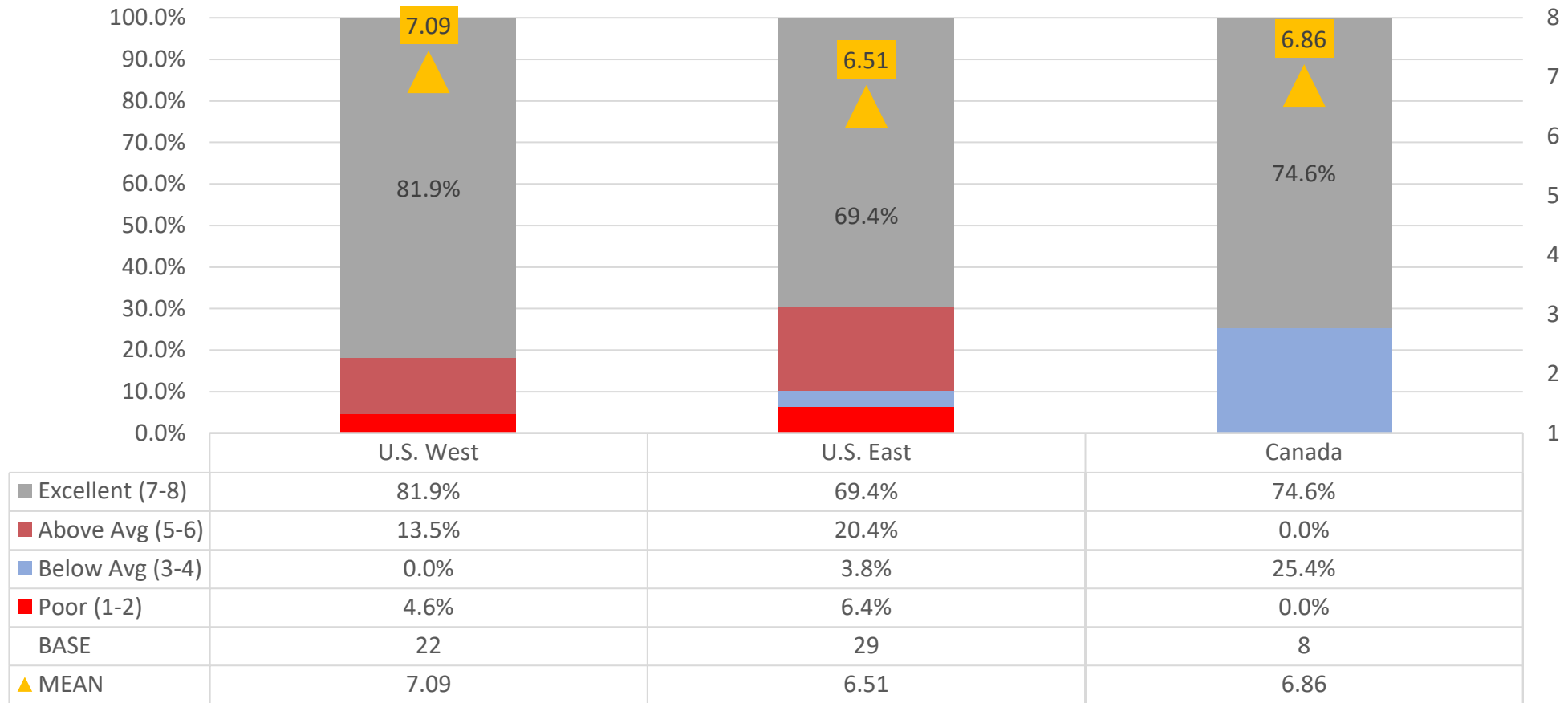
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



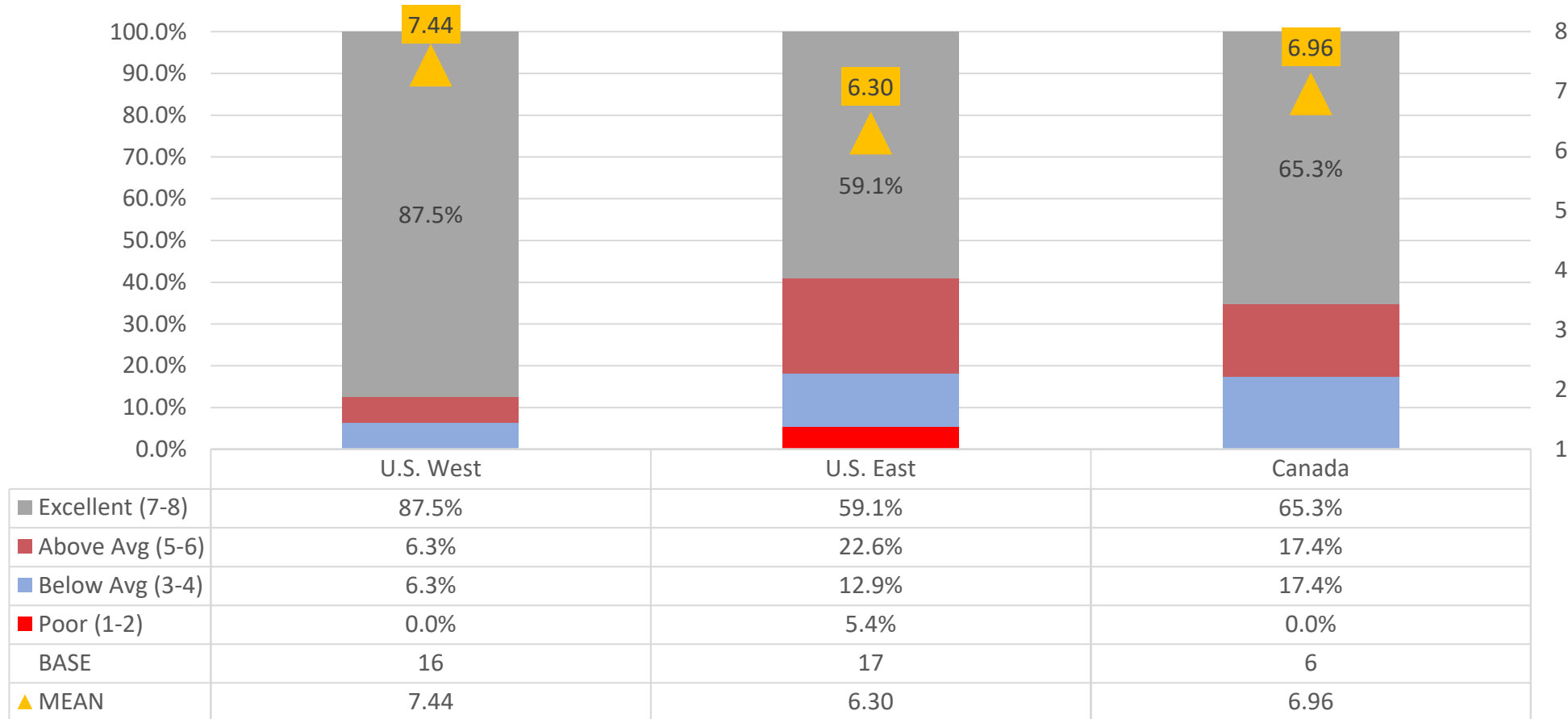
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



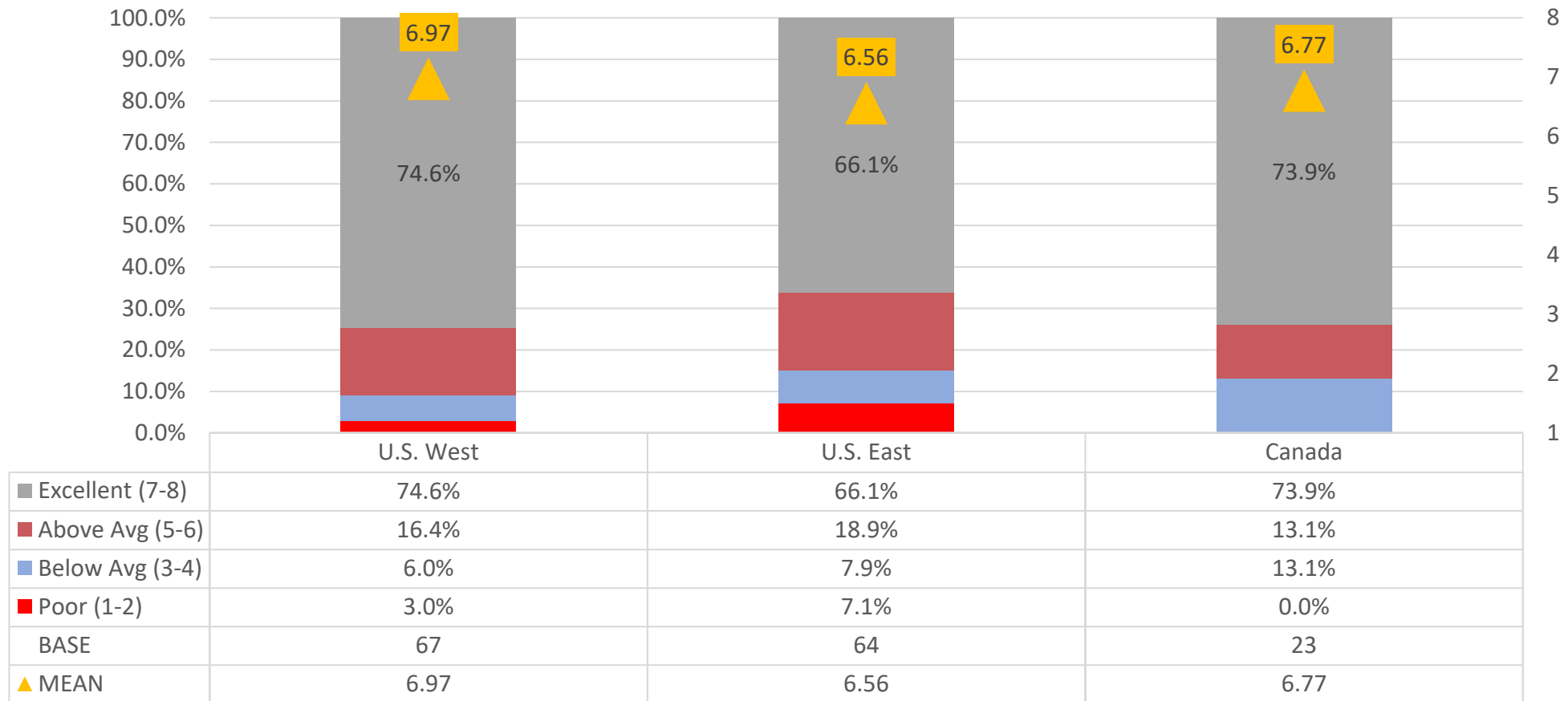
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



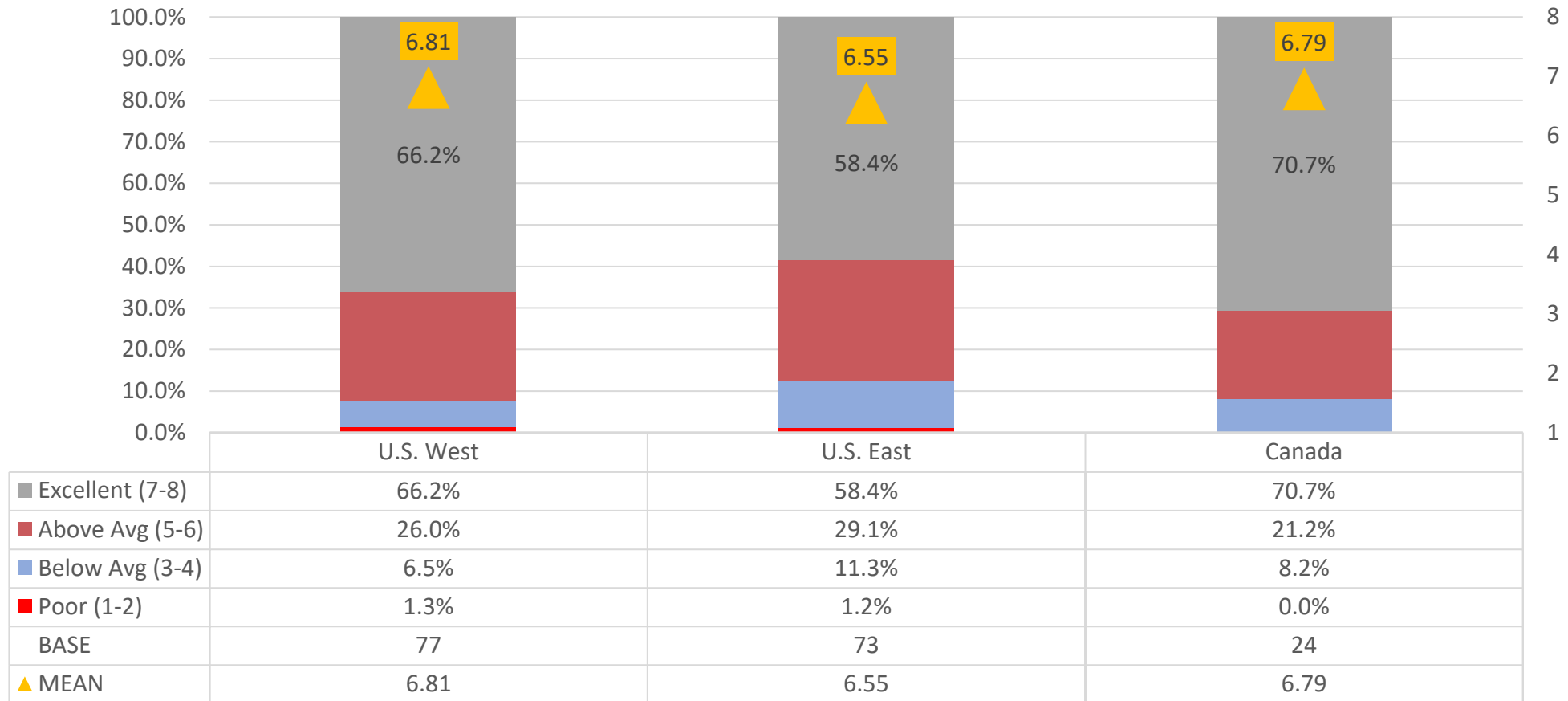
# OVERALL ACCESSIBILITY - HOTELS

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



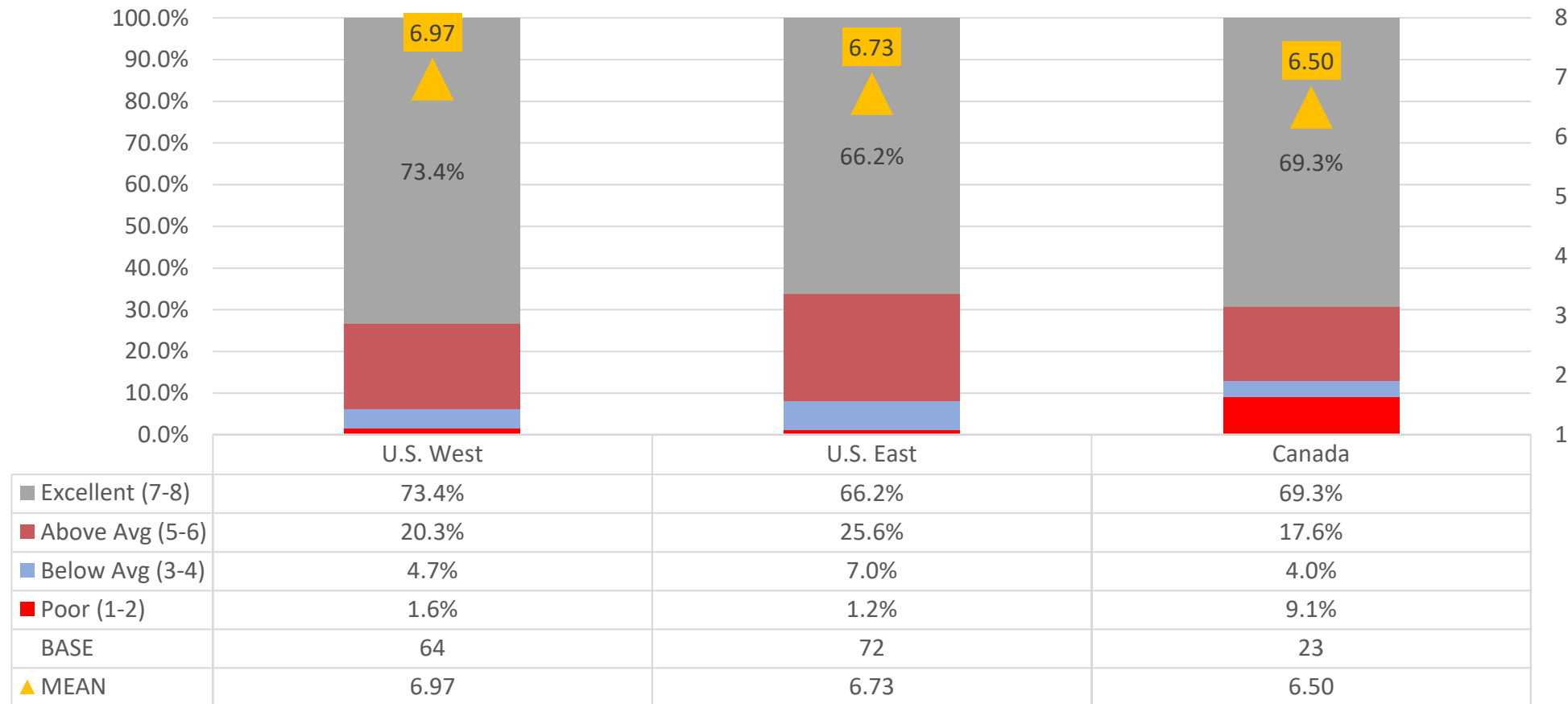
# OVERALL ACCESSIBILITY - RESTAURANTS

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



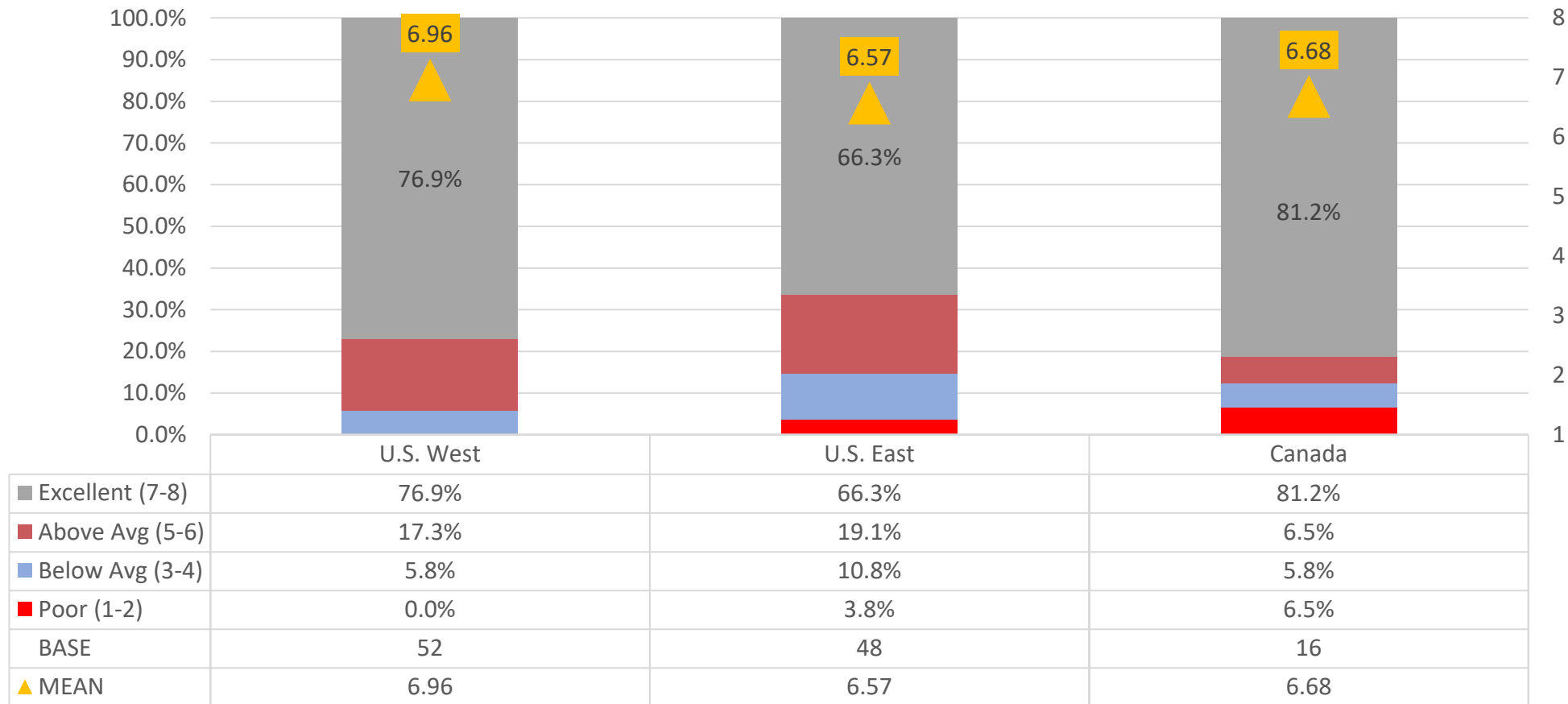
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

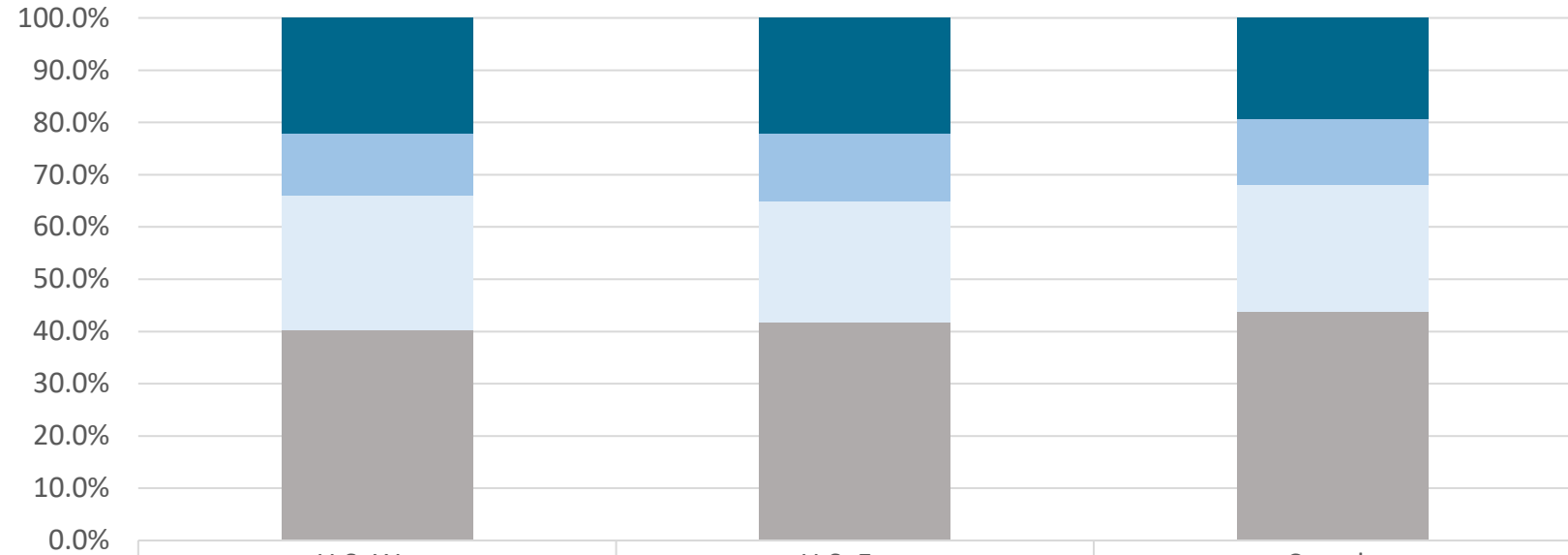
8-pt Rating Scale  
8=Excellent/ 1=Poor



# Section 4 – Alternative Messaging

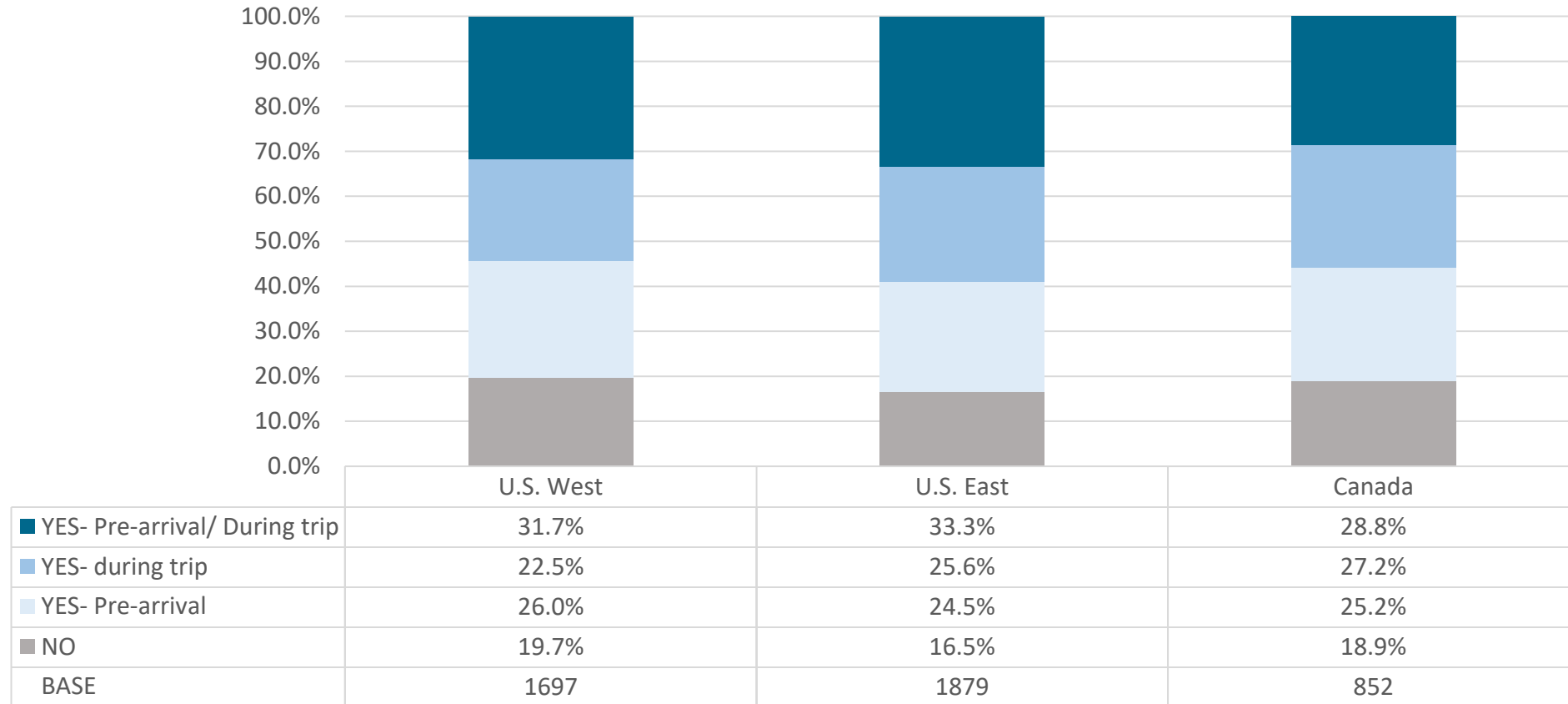


# SAFE AND RESPONSIBLE TRAVEL

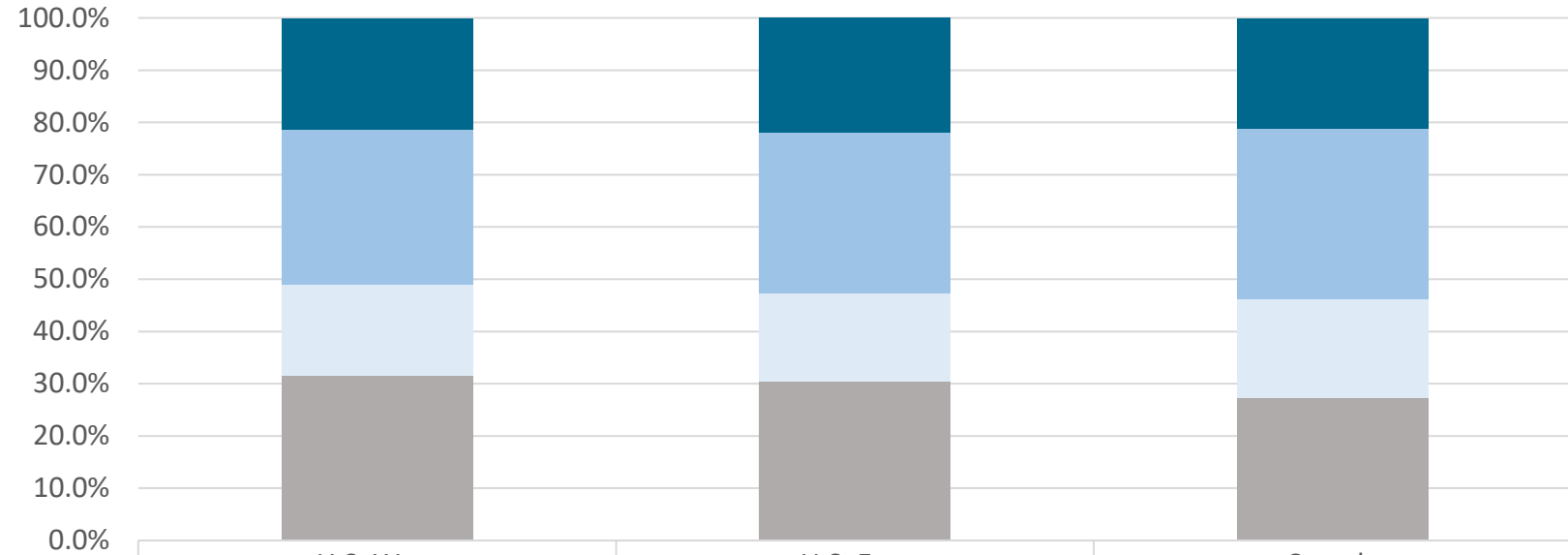


	U.S. West	U.S. East	Canada
■ YES- Pre-arrival/ During trip	22.2%	22.1%	19.4%
■ YES- during trip	11.7%	13.0%	12.5%
■ YES- Pre-arrival	25.9%	23.0%	24.3%
■ NO	40.2%	41.9%	43.8%
BASE	1697	1879	852

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

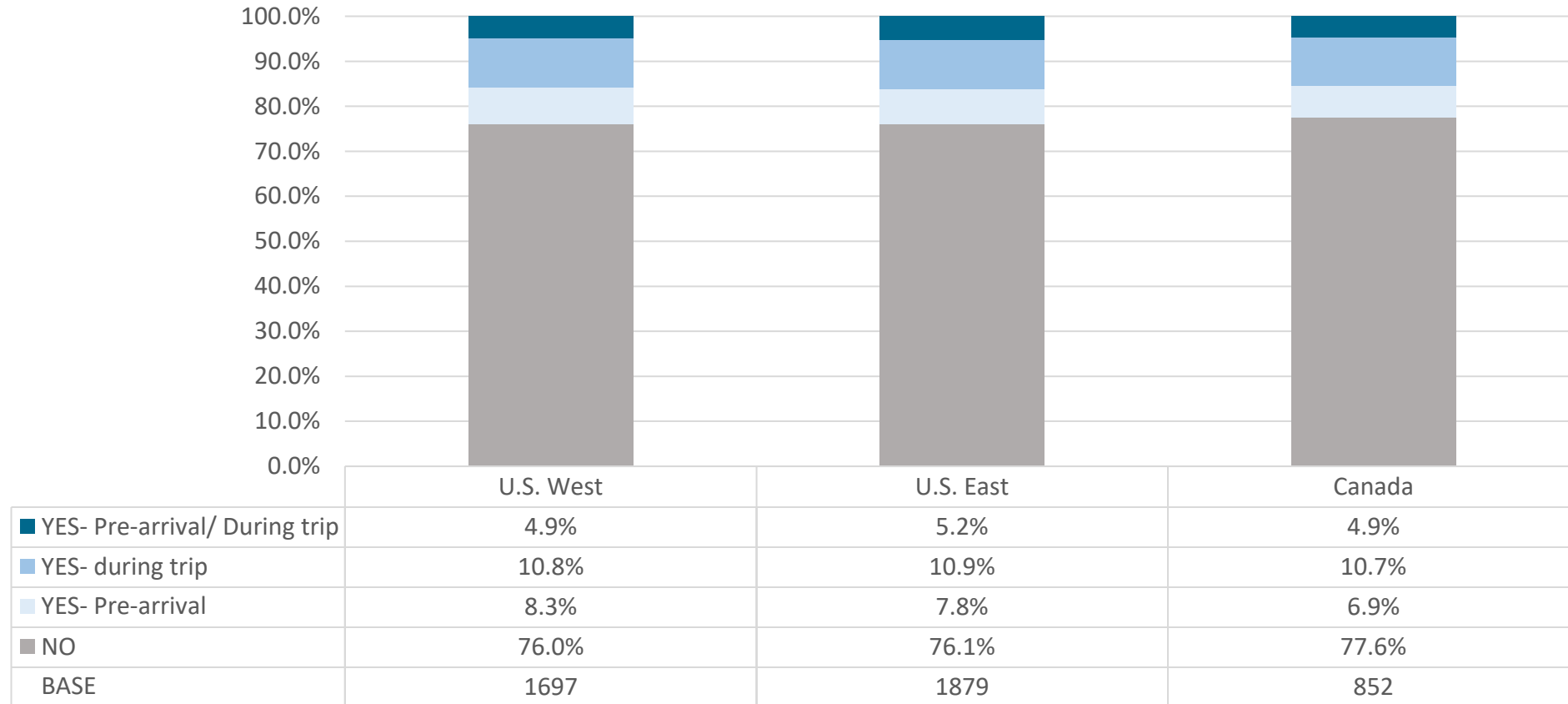


# OCEAN AND HIKING SAFETY

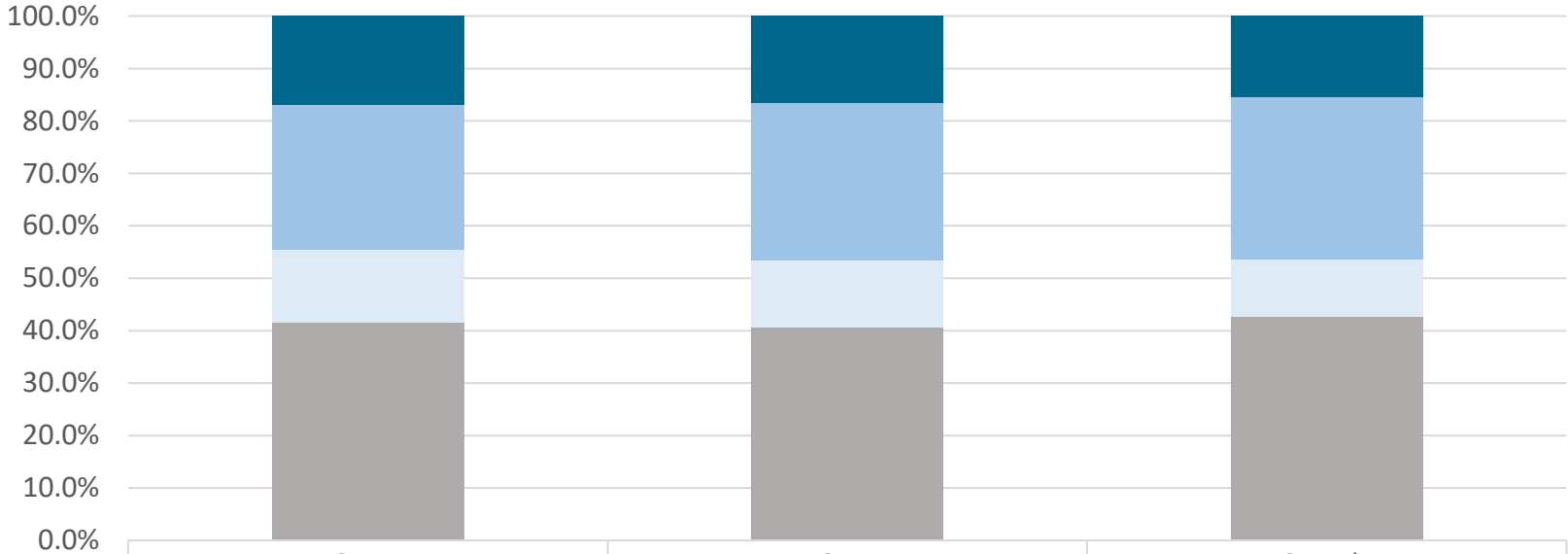


	U.S. West	U.S. East	Canada
YES- Pre-arrival/ During trip	21.2%	21.9%	21.0%
YES- during trip	29.8%	30.9%	32.7%
YES- Pre-arrival	17.4%	16.8%	18.9%
NO	31.5%	30.4%	27.3%
BASE	1697	1879	852

# VOLUNTEER/ GIVE-BACK OPPORTUNITIES

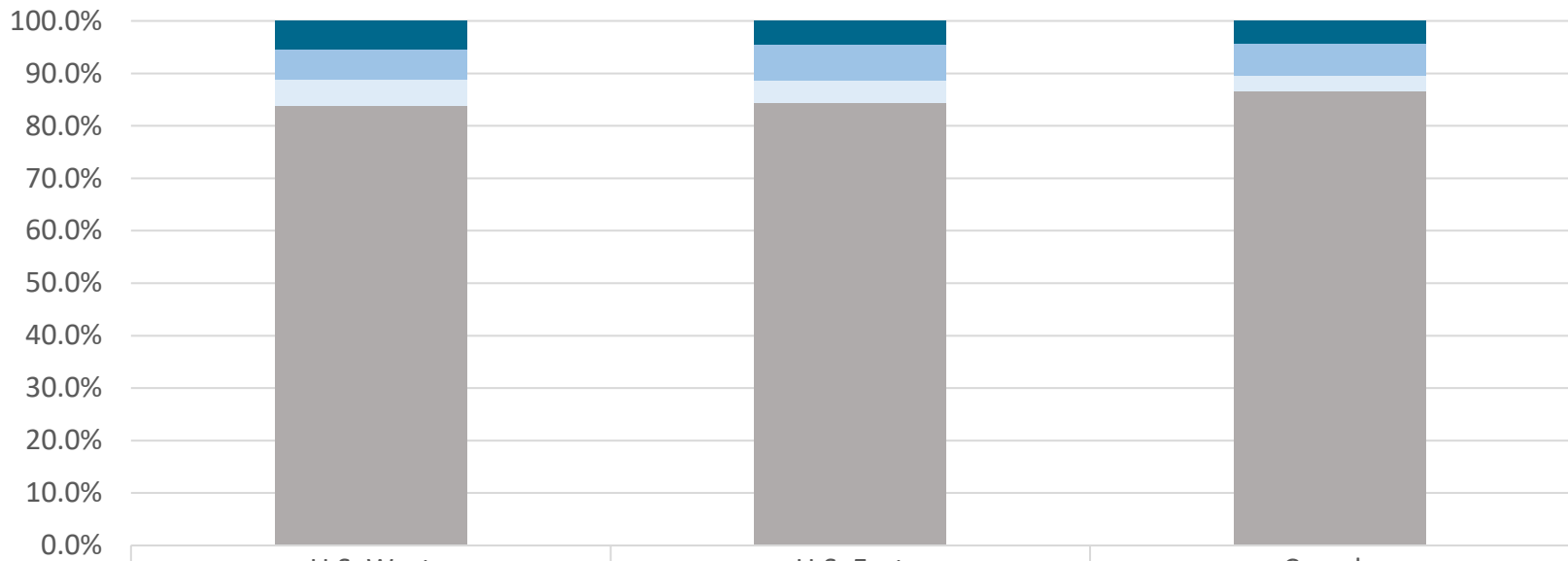


# SUPPORT LOCAL/ SHOP LOCAL



	U.S. West	U.S. East	Canada
YES- Pre-arrival/ During trip	16.9%	16.6%	15.4%
YES- during trip	27.6%	29.9%	30.9%
YES- Pre-arrival	14.0%	12.9%	11.0%
NO	41.5%	40.6%	42.7%
BASE	1697	1879	852

# MALAMA HAWAI'I

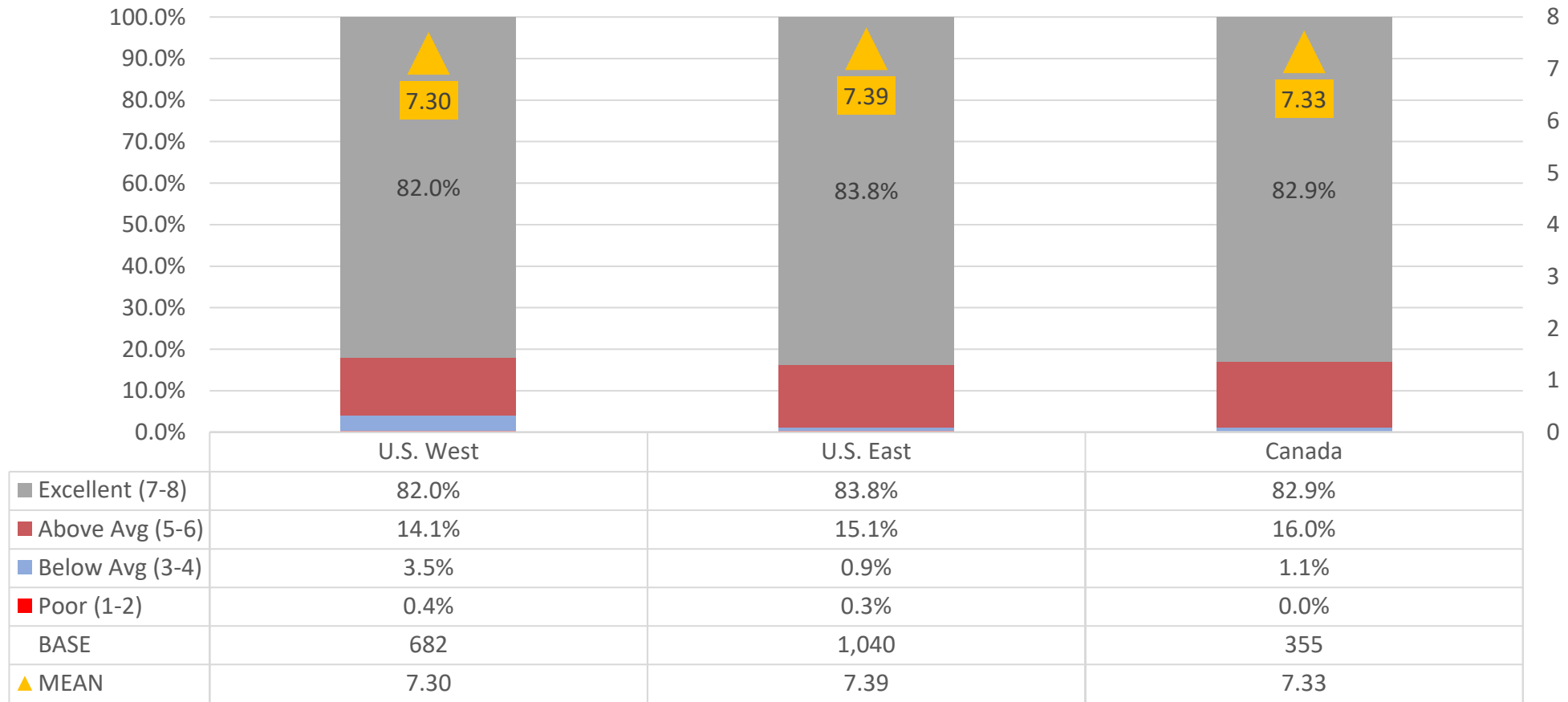


	U.S. West	U.S. East	Canada
■ YES- Pre-arrival/ During trip	5.4%	4.6%	4.3%
■ YES- during trip	5.8%	6.7%	6.0%
■ YES- Pre-arrival	5.0%	4.4%	3.1%
■ NO	83.8%	84.3%	86.6%
BASE	1697	1879	852

# Section 5 – O'AHU

# SATISFACTION - O'AHU

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



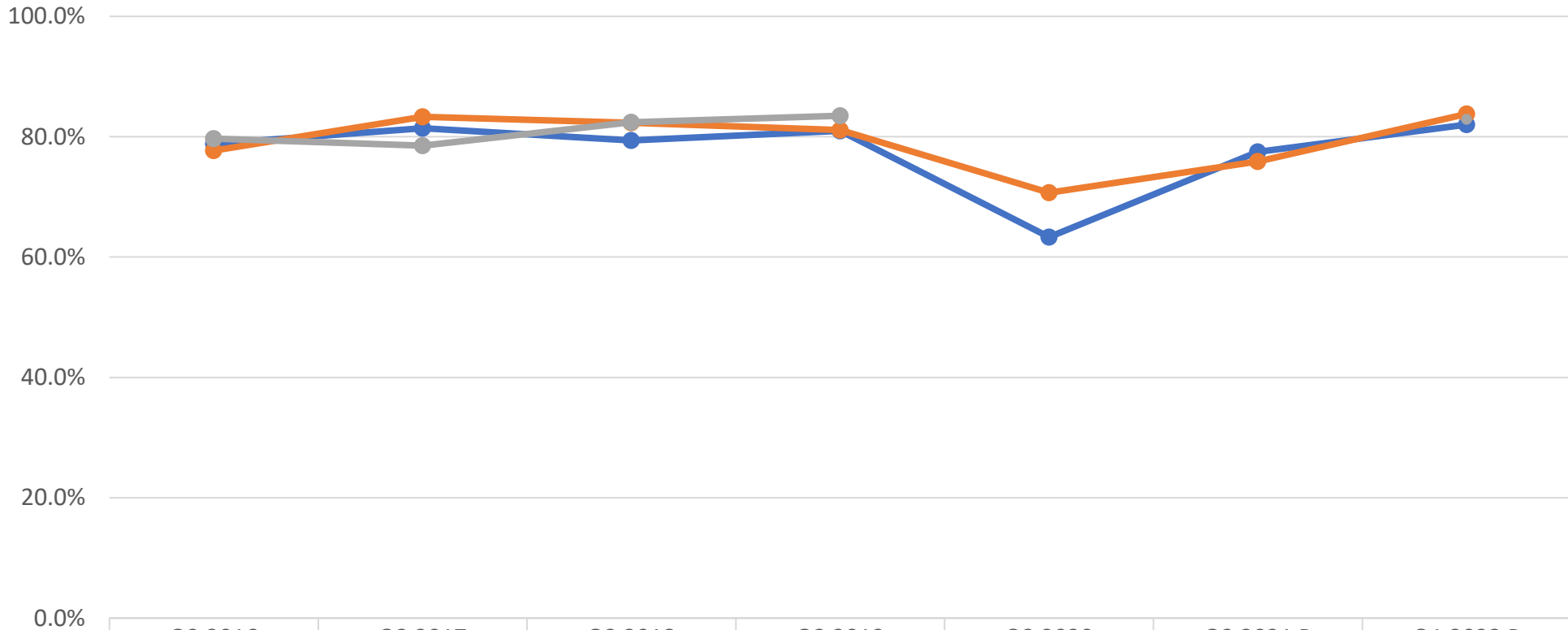


# SATISFACTION - O'AHU

- **Islands visited:** Visitors from the U.S. East and U.S. West who stayed exclusively on O'ahu during their trip gave the island higher satisfaction scores, compared to those who's trip also included a Neighbor Island stay.
- **Age:** Amongst visitors from the U.S. West, satisfaction was highest with young adults under the age of 35 and was lowest with visitors between the ages of 50-64.
- **Gender:** Female visitors from the U.S. East gave higher satisfaction scores compared to males from this visitor market.

# SATISFACTION - O'AHU

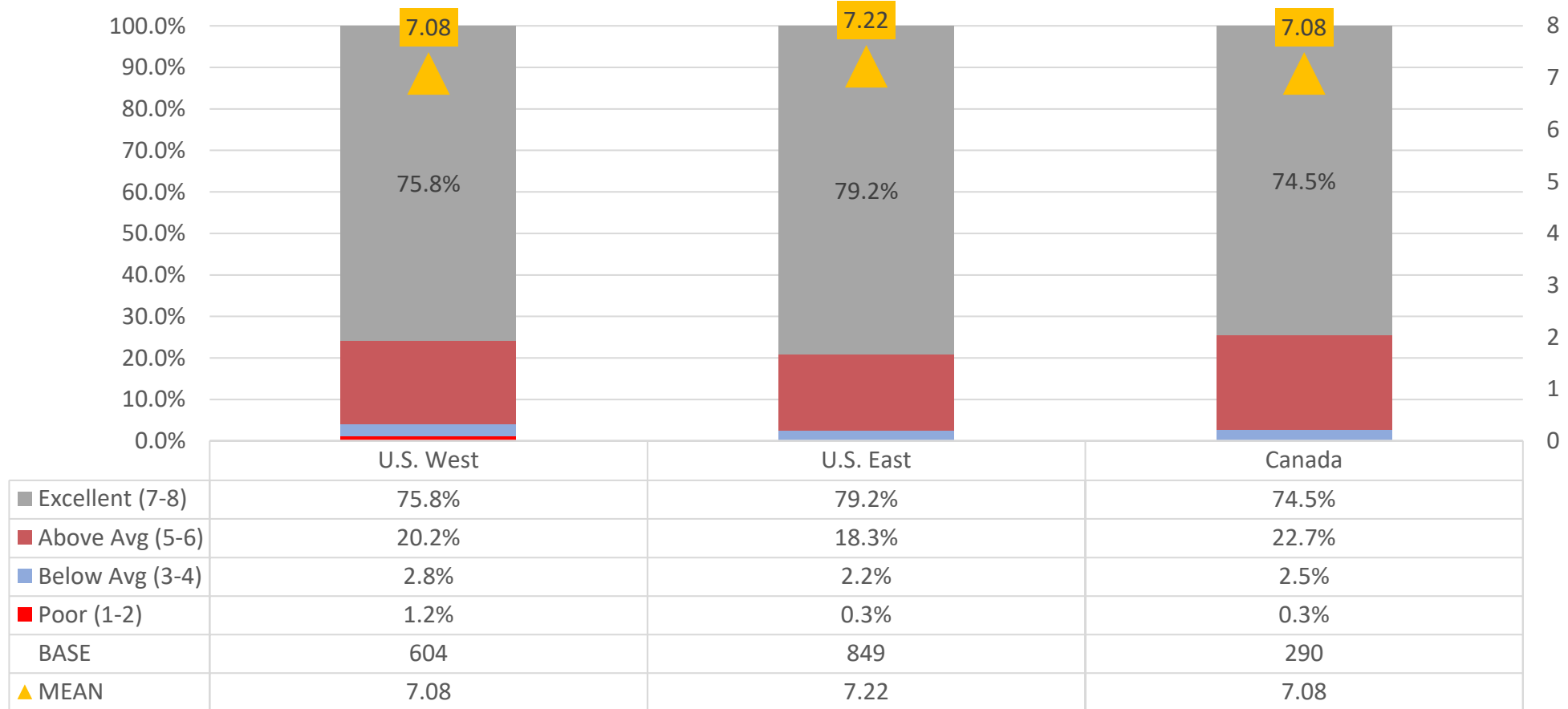
Tracking Data – Rating of “Excellent” (7-8)



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q1 2022 P
U.S. West	78.8%	81.4%	79.4%	81.0%	63.3%	77.5%	82.0%
U.S. East	77.7%	83.3%	82.3%	81.1%	70.7%	75.9%	83.8%
Canada	79.7%	78.5%	82.4%	83.5%			82.9%

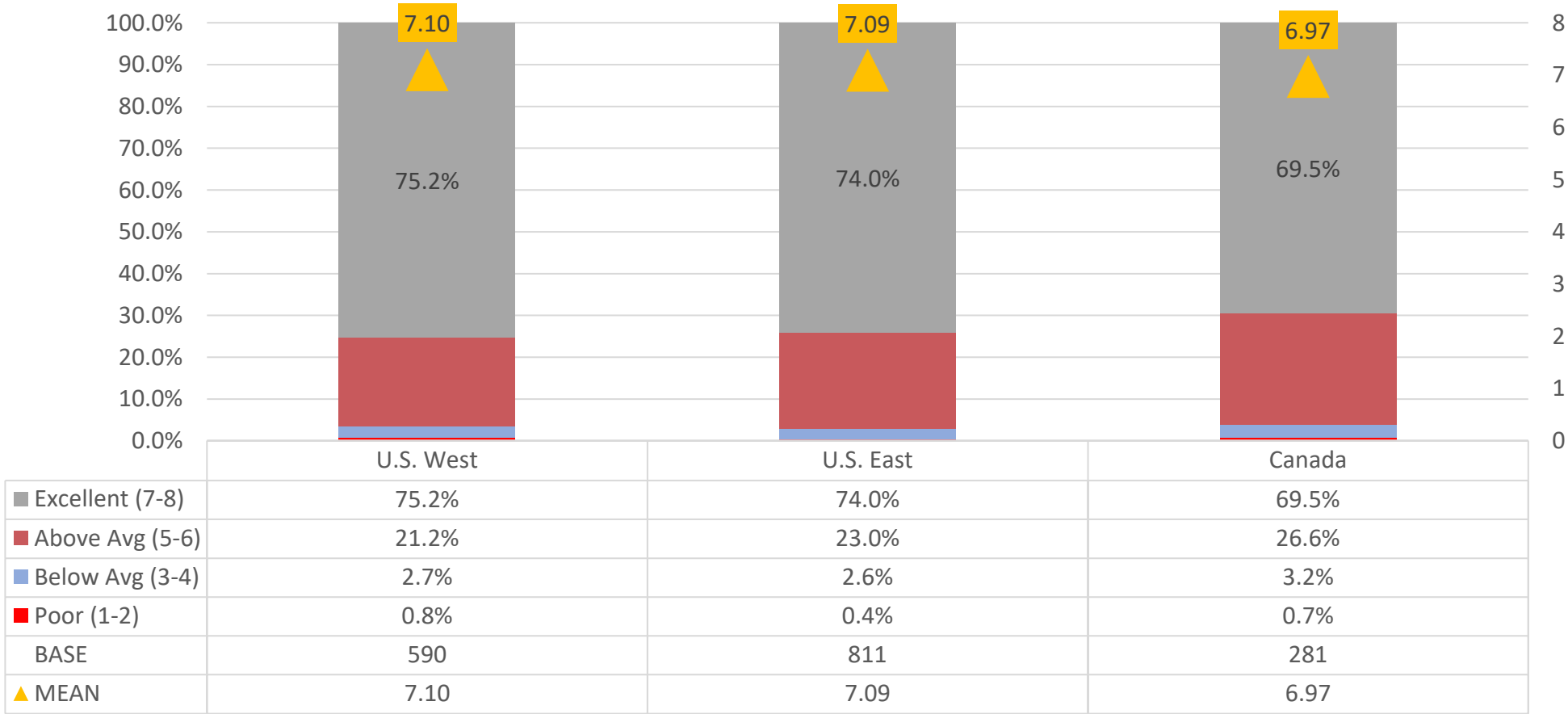
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



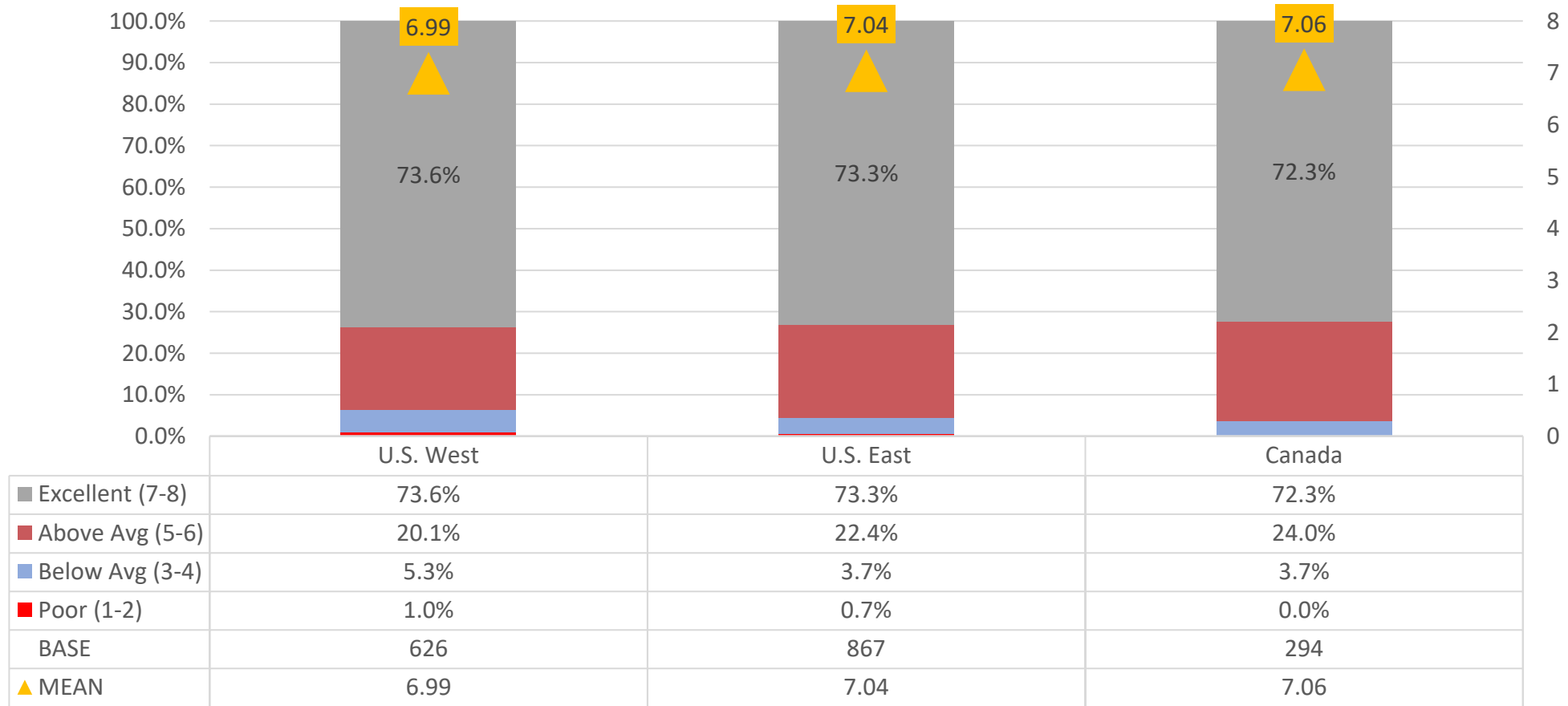
# SHOPPING - O'AHU

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



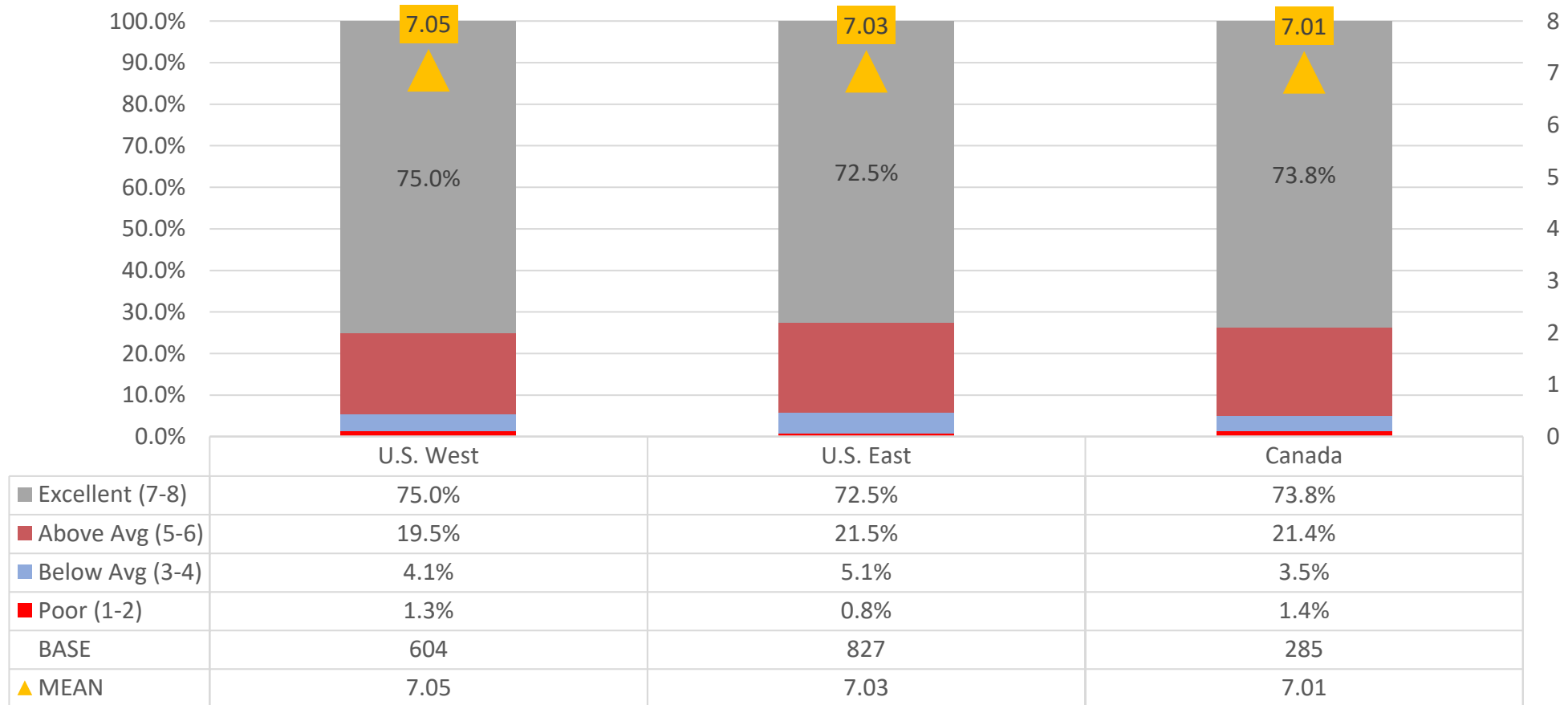
# DINING/ FOOD & BEVERAGES – O’AHU

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



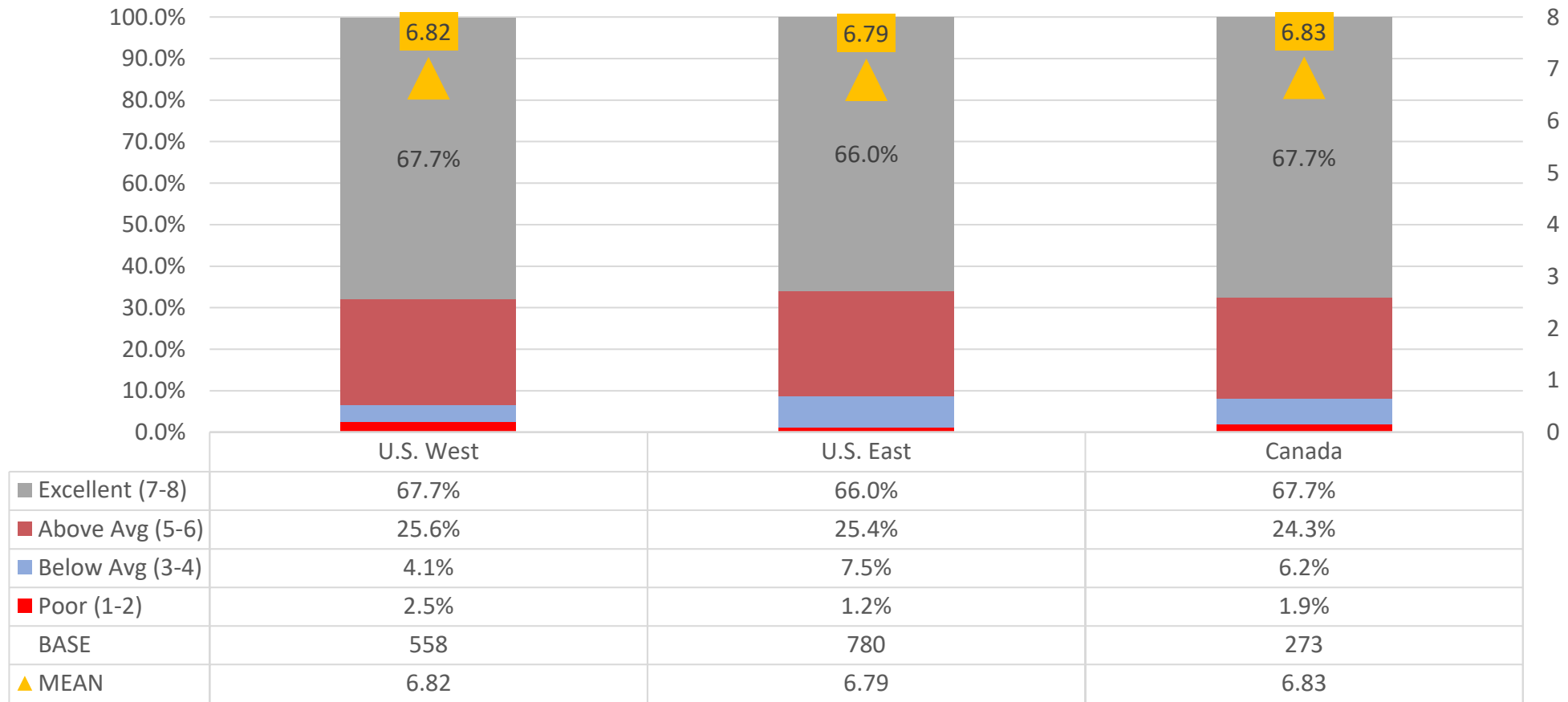
# LODGING/ ACOMMODATIONS - O'AHU

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



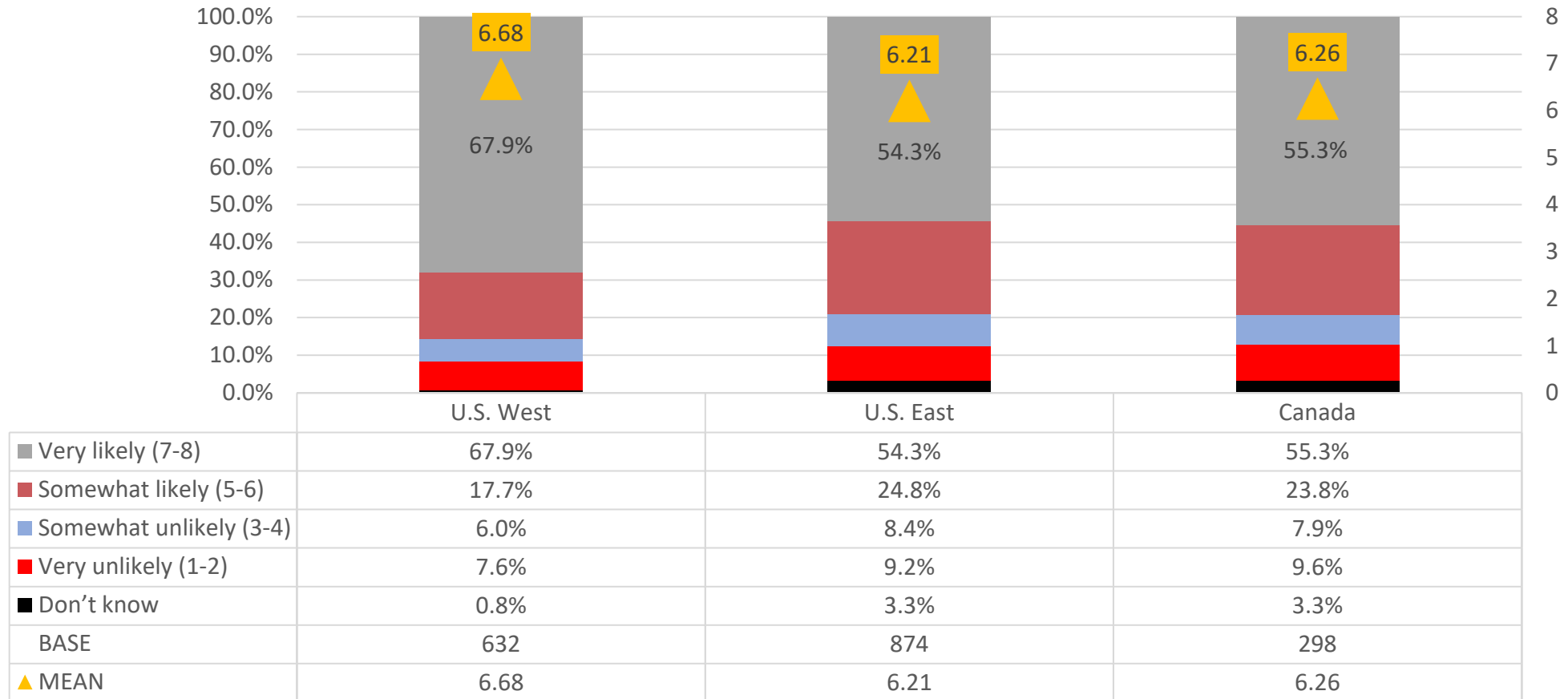
# TRANSPORTATION ON ISLAND - O'AHU

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



# LIKELIHOOD OF RETURN VISIT - O'AHU

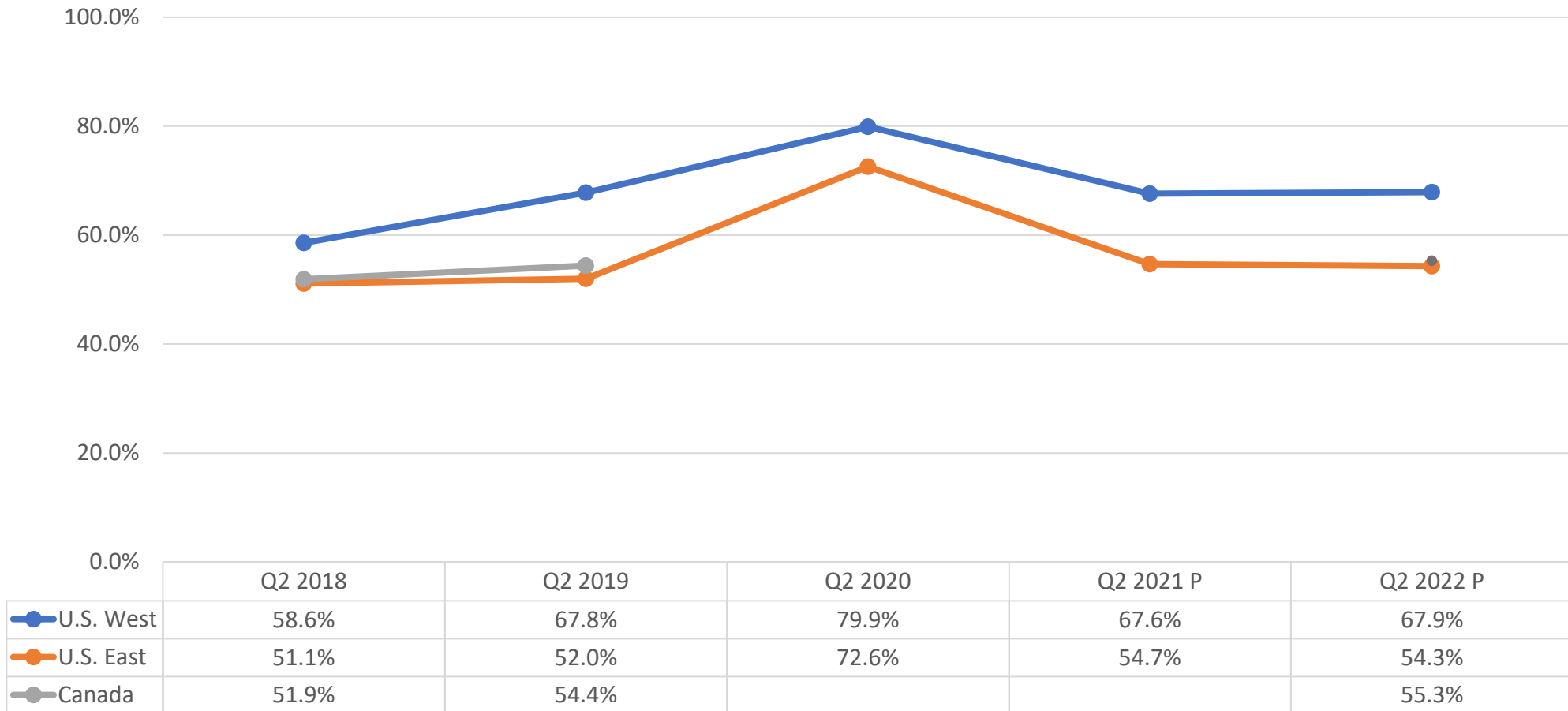
8-pt Rating Scale  
8=Very likely/ 1=Very unlikely



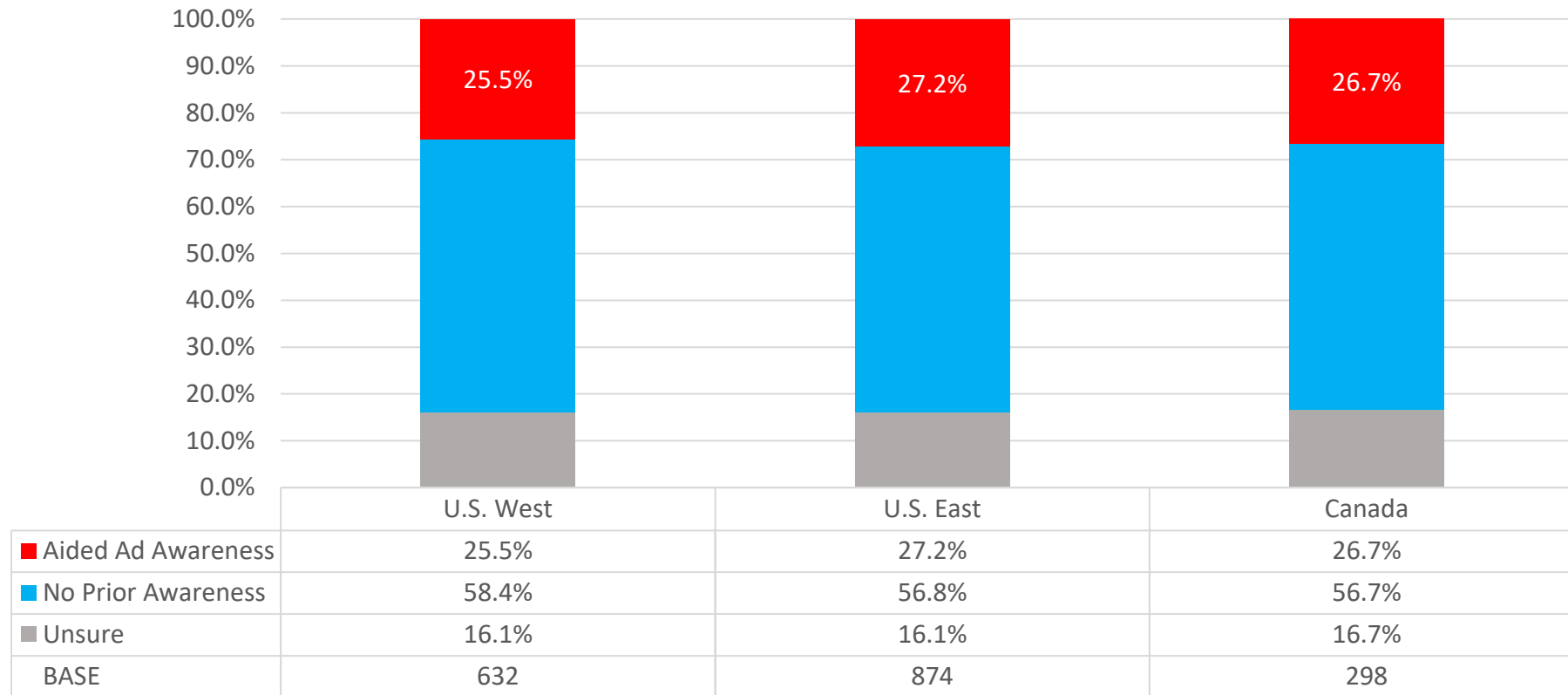


# LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)



# AIDED ADVERTISING AWARENESS - O'AHU



# MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	41.1%	45.8%	50.4%
Outdoor or sporting activities/ events	18.5%	12.4%	17.7%
Hawaiian cultural events	15.2%	14.2%	12.0%
Social media posts/ videos	12.6%	13.3%	20.4%
Hawaiian music	6.5%	5.1%	6.7%
Television programs or movies filmed in Hawai'i	9.2%	11.0%	17.5%
<b>BASE</b>	632	874	298

# ATTRACTIONS- O'AHU

	U.S. West	U.S. East	Canada
Atlantis Submarine & Cruises	3.0%	4.3%	3.0%
Bernice P. Bishop Museum	2.5%	4.7%	3.3%
Byodo In Temple	11.2%	13.9%	13.6%
Chinatown & Honolulu Art District	10.6%	10.8%	13.0%
Diamond Head State Monument	24.6%	36.9%	43.2%
Dole Plantation	30.8%	36.5%	35.7%
Foster Botanical Garden	4.7%	3.7%	2.9%
Haleiwa	20.1%	21.4%	18.6%
Hanauma Bay Nature Reserve	11.1%	9.8%	17.1%
Harold L. Lyon Arboretum	1.0%	0.7%	0.7%
Hawai'i State Art Museum	1.3%	1.1%	0.6%
Honolulu Museum of Art	1.6%	0.8%	2.4%
Hawaiian Mission Houses, Historic Site and Archive	0.6%	1.0%	1.3%
Hawai'i's Plantation Village	1.6%	1.3%	1.7%
Honolulu Zoo	6.3%	9.1%	12.8%

# ATTRACTIONS- O'AHU

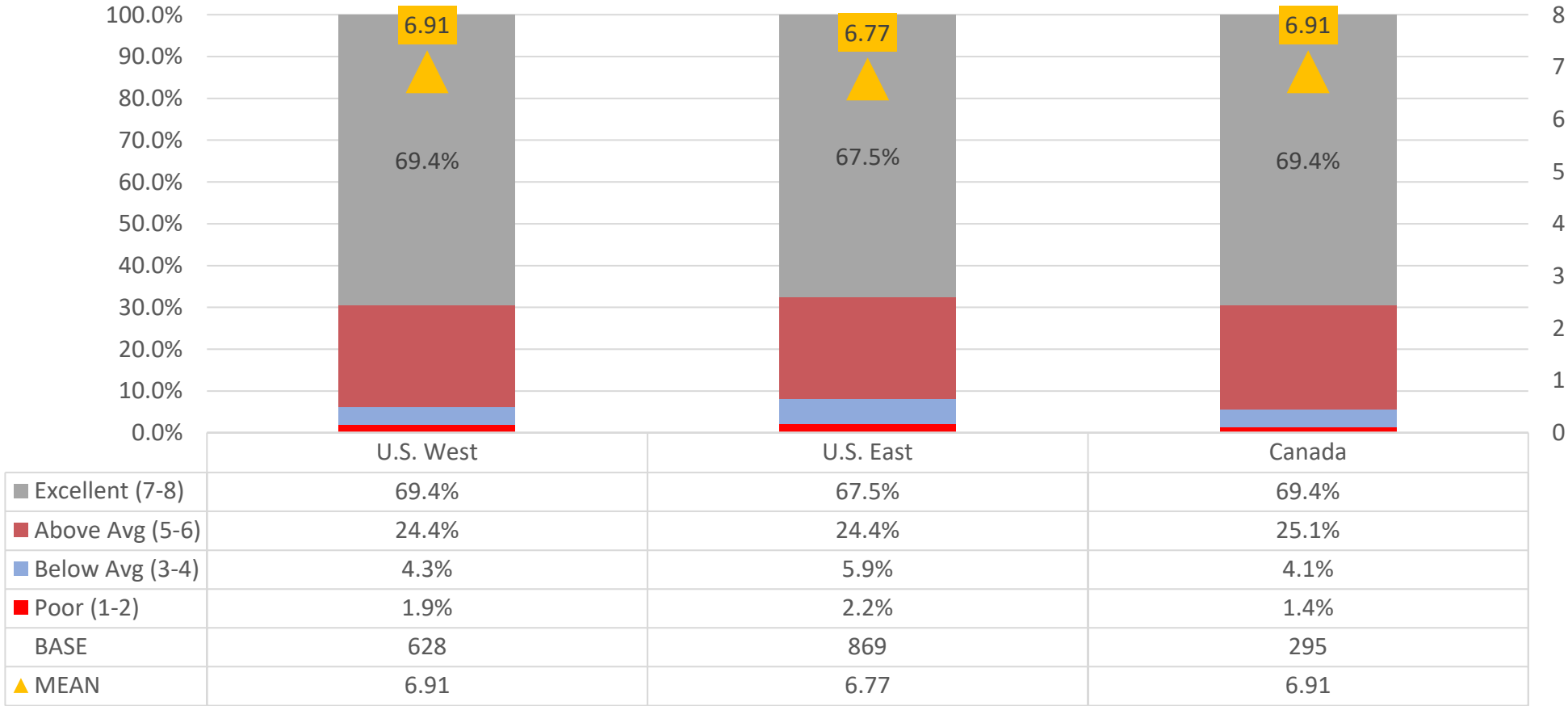
	U.S. West	U.S. East	Canada
Ho'omaluhia Botanical Garden	5.1%	5.5%	7.3%
Iolani Palace State Monument	4.4%	7.6%	6.7%
Kailua Town	12.8%	10.3%	11.8%
Kaiwi State Scenic Shoreline/ Makapuu Trail	3.9%	7.2%	5.6%
Kakaako Street Art	1.9%	1.6%	2.7%
Koko Head Crater Trail	7.4%	6.2%	14.5%
Kualoa Private Nature Reserve	16.1%	16.1%	20.4%
Lanikai or Kailua Beach	28.3%	25.3%	34.1%
Manoa Falls & Trail	14.7%	15.4%	16.8%
National Memorial Cemetery of the Pacific	7.1%	11.4%	6.7%
Nuuanu Pali Lookout	10.6%	13.7%	11.1%
North Shore Beaches	44.9%	44.5%	50.8%

# ATTRACTIONS- O'AHU

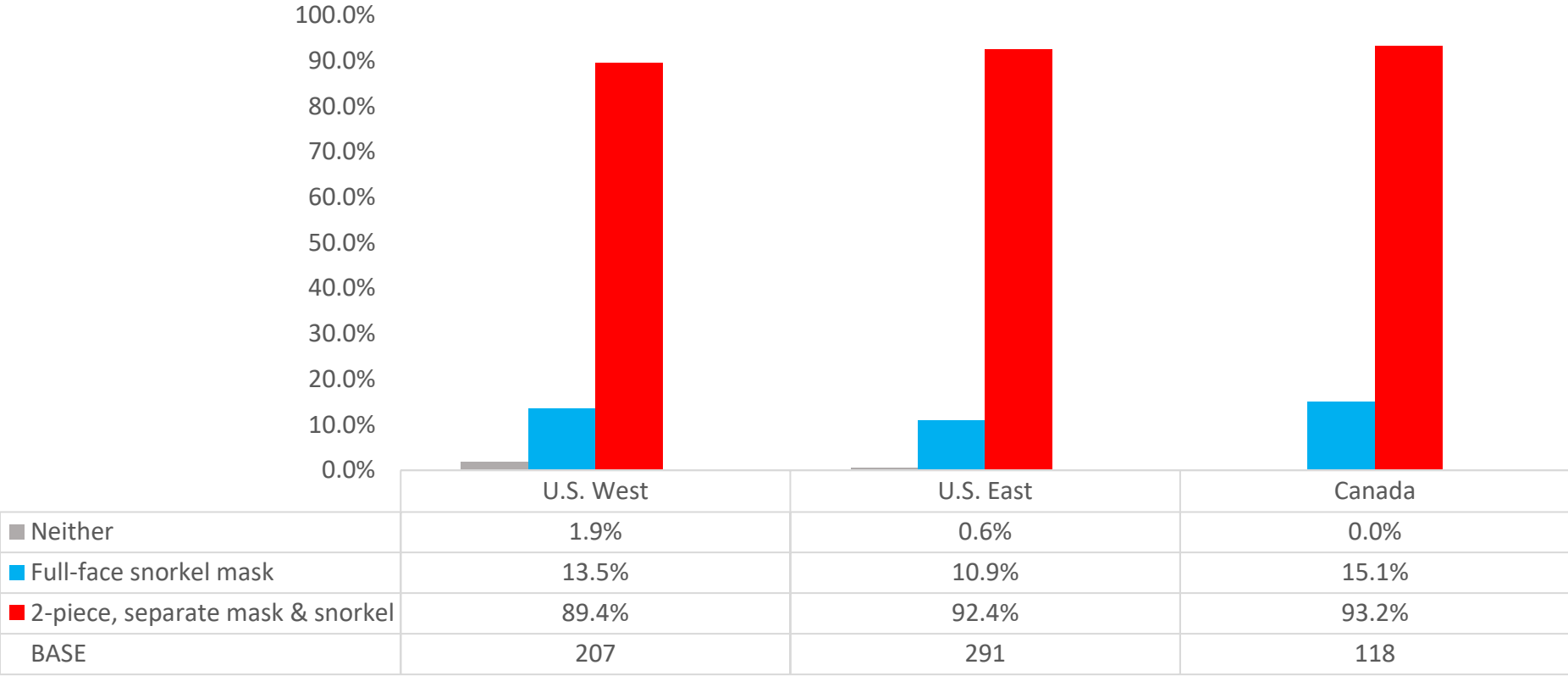
	U.S. West	U.S. East	Canada
<b>Pearl Harbor National Memorial</b>	30.2%	49.1%	35.1%
<b>Battleship Missouri Memorial</b>	10.6%	18.4%	14.3%
<b>Pearl Harbor Aviation Museum</b>	8.4%	15.3%	13.0%
<b>Pacific Fleet Submarine Museum</b>	3.0%	7.4%	6.5%
<b>Polynesian Cultural Center</b>	16.4%	15.6%	14.8%
<b>Queen Emma's Summer Palace</b>	1.9%	1.7%	0.4%
<b>Sea Life Park Hawai'i</b>	4.1%	3.6%	6.3%
<b>Waikiki Aquarium</b>	4.6%	5.1%	6.4%
<b>Waimanalo Beach Park</b>	8.1%	8.4%	13.8%
<b>Waimea Valley</b>	16.9%	18.4%	16.1%

# DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



# SNORKELING EQUIPMENT USED - O'AHU

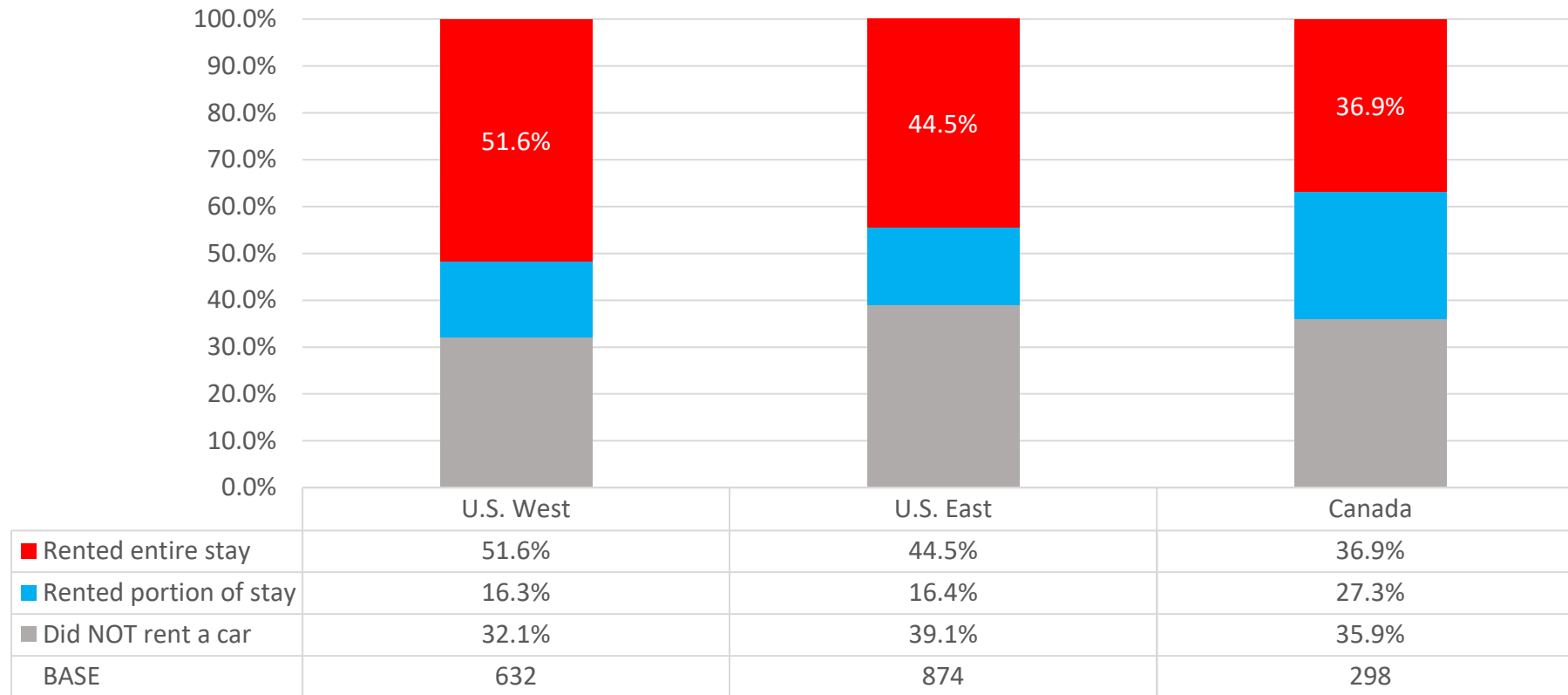




# SNORKELING OCEAN SAFETY- O'AHU

	U.S. West	U.S. East	Canada
<b>Did not have to be assisted or rescued</b>	99.0%	96.4%	98.2%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	1.0%	3.3%	1.8%
<b>Yes, while doing another type of ocean activity</b>	0.0%	0.3%	0.0%
<b>BASE</b>	203	289	118

# CAR RENTAL - O'AHU



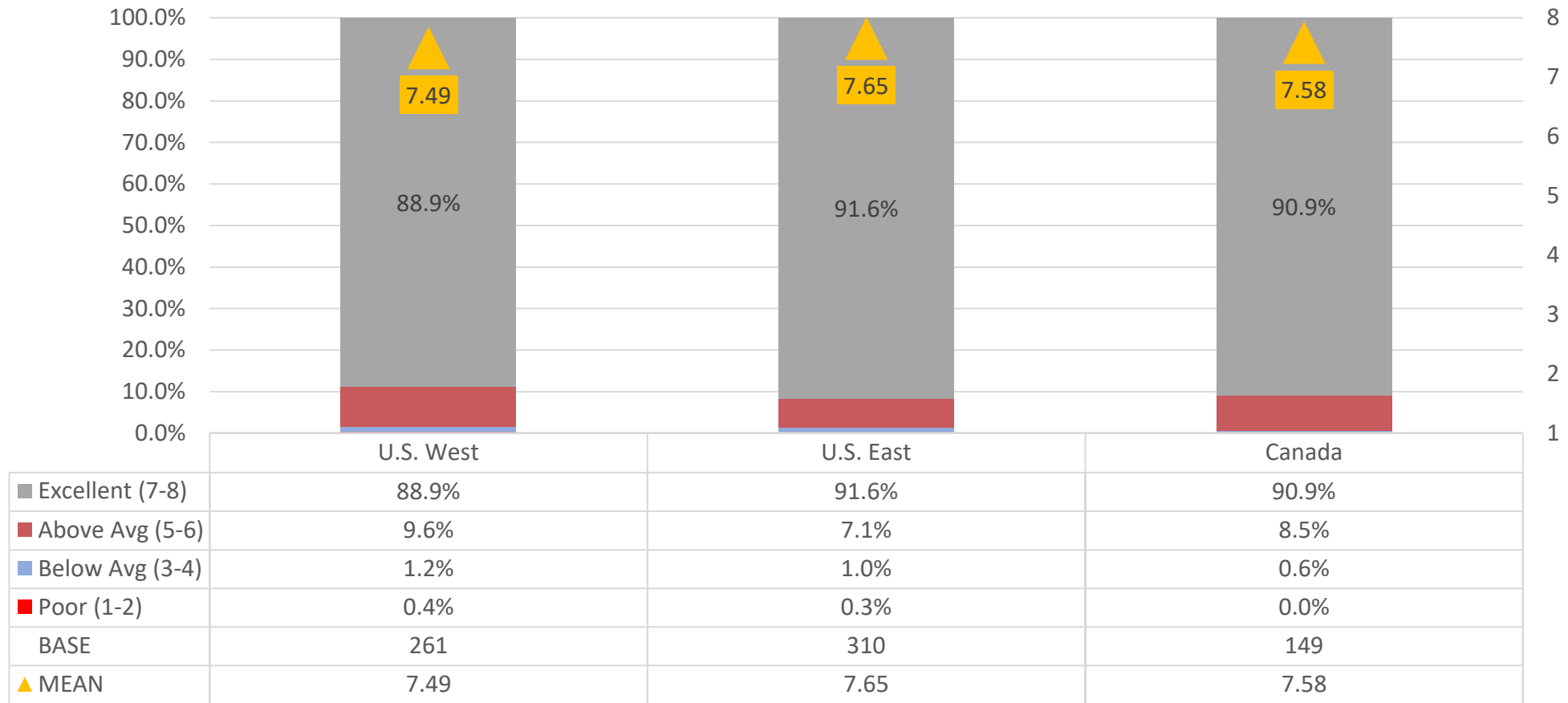
# REASONS FOR PARTIAL RENTAL CAR - O'AHU

	U.S. West	U.S. East	Canada
I only needed a vehicle on certain days	74.8%	68.4%	71.1%
Parking was too expensive at my hotel/ lodging	42.7%	39.2%	43.9%
Car rental rates were too expensive	31.1%	30.8%	36.9%
Vehicles were not available for all of my trip dates	3.9%	9.6%	5.1%
BASE	103	144	81

# Section 6 – KAUA‘I

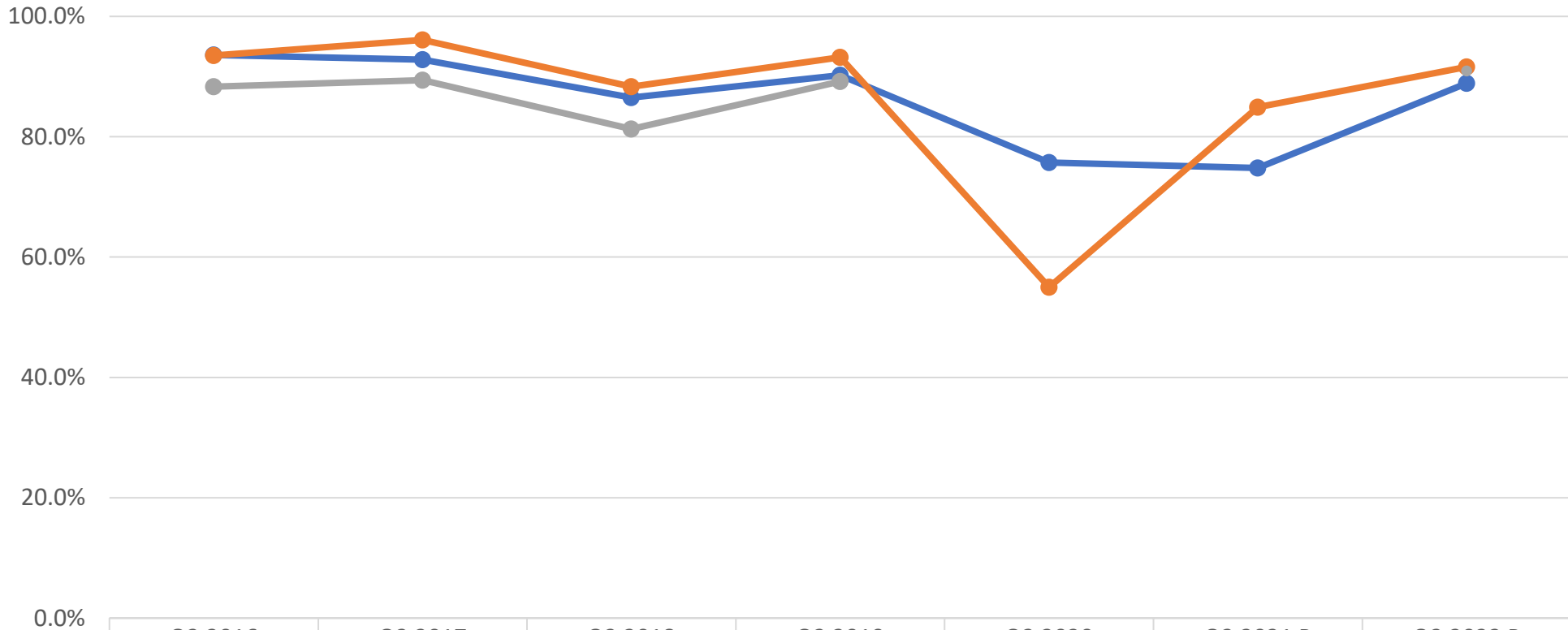
# SATISFACTION - KAUA'I

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



# SATISFACTION - KAUA'I

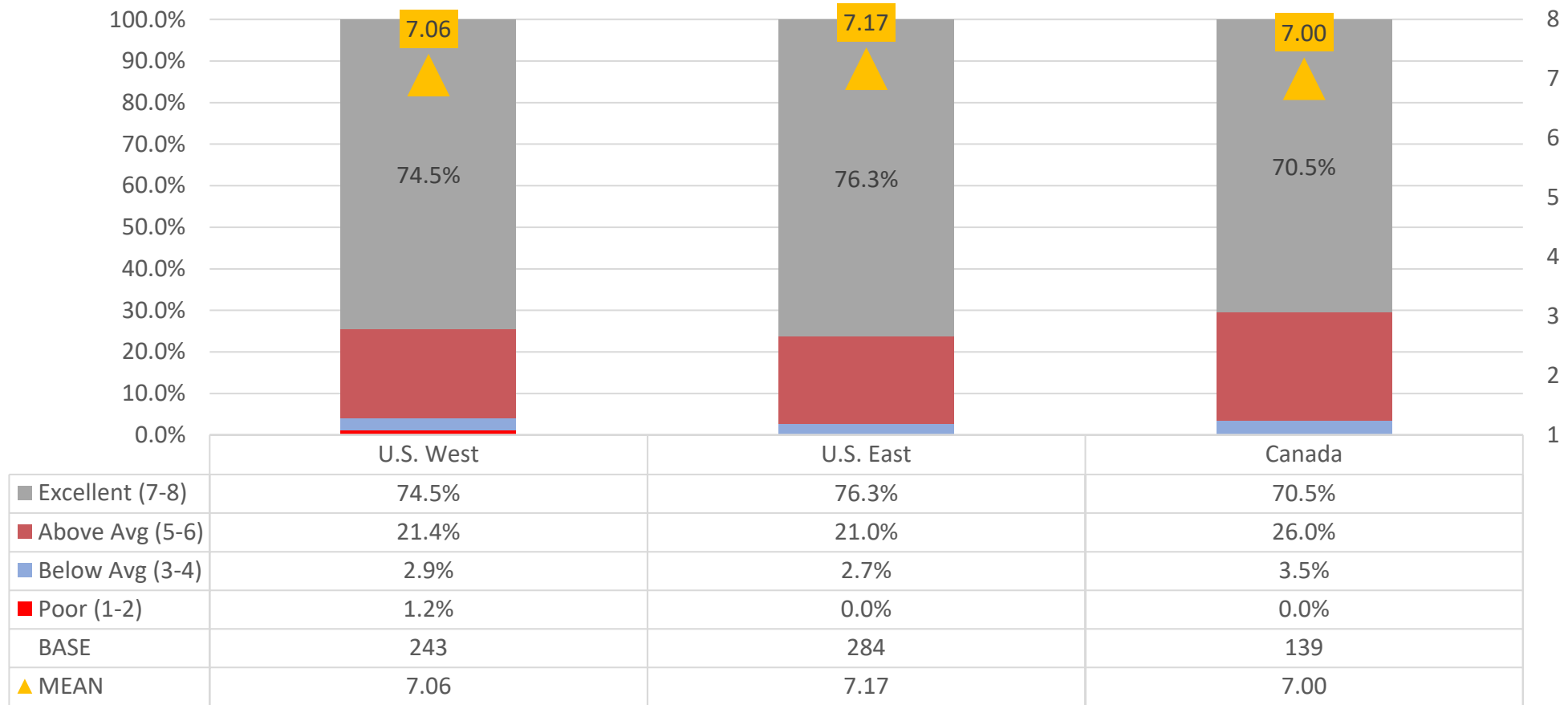
Tracking Data – Rating of “Excellent” (7-8)



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	93.6%	92.8%	86.5%	90.2%	75.7%	74.8%	88.9%
U.S. East	93.5%	96.1%	88.3%	93.2%	55.0%	84.9%	91.6%
Canada	88.3%	89.4%	81.3%	89.2%			90.9%

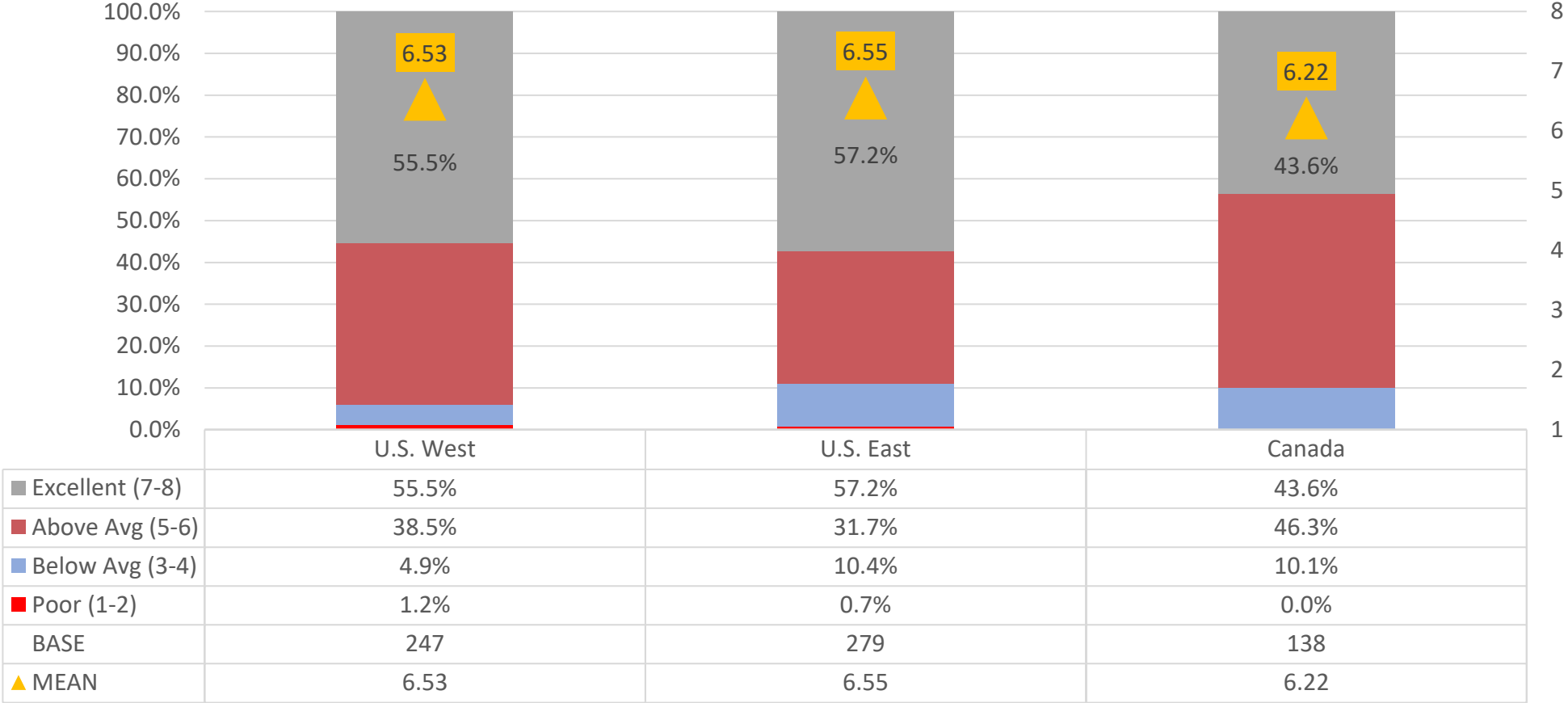
# ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



# SHOPPING - KAUA'I

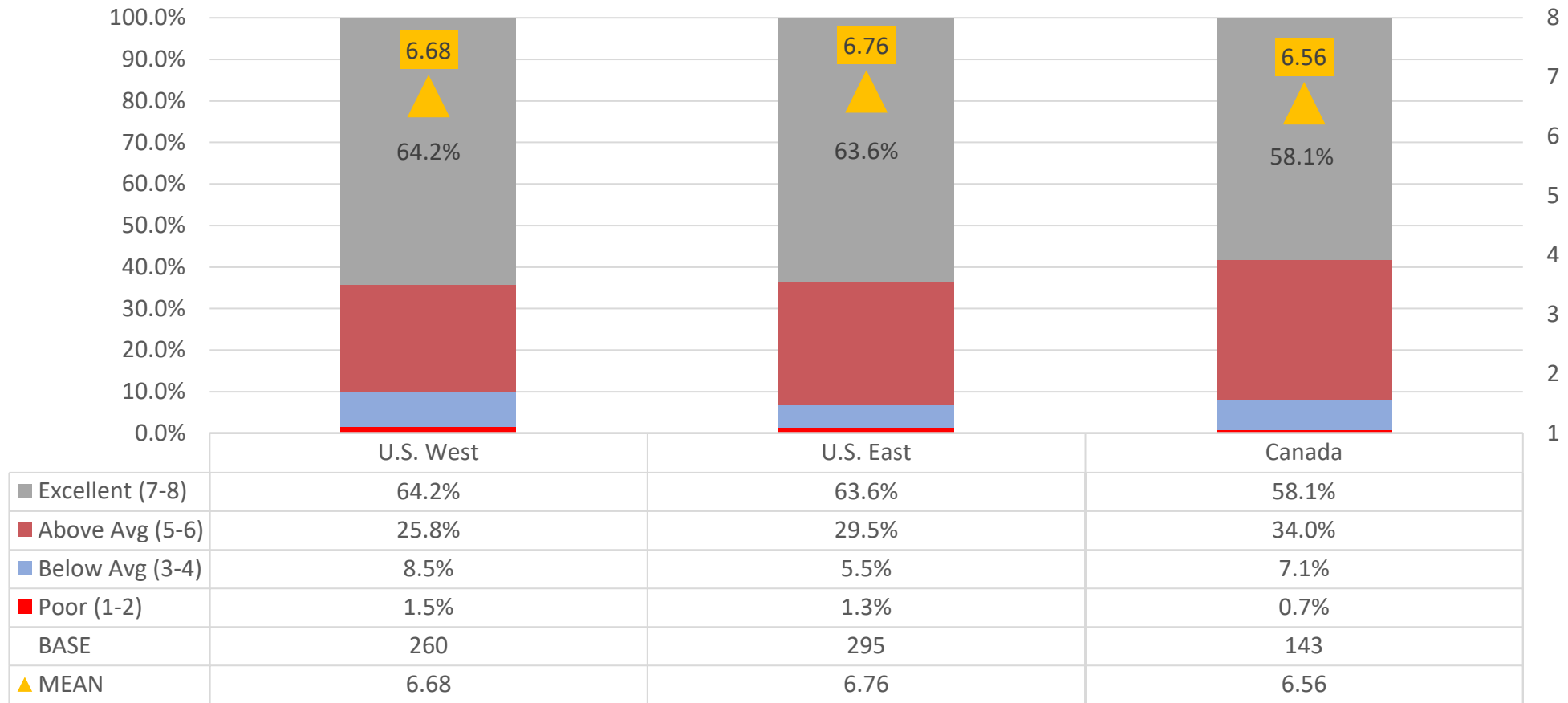
8-pt Rating Scale  
8=Excellent/ 1=Poor





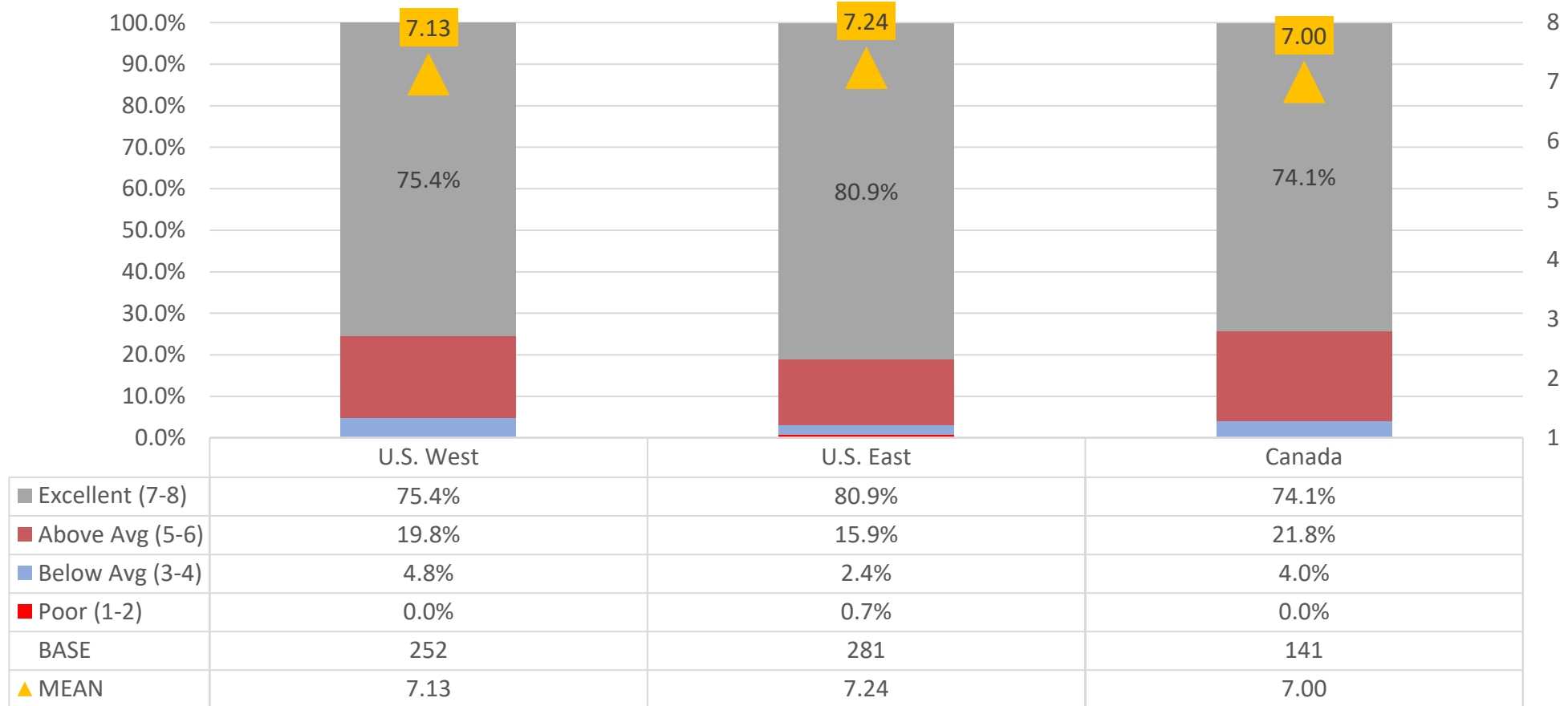
# DINING/ FOOD & BEVERAGE - KAUA'I

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



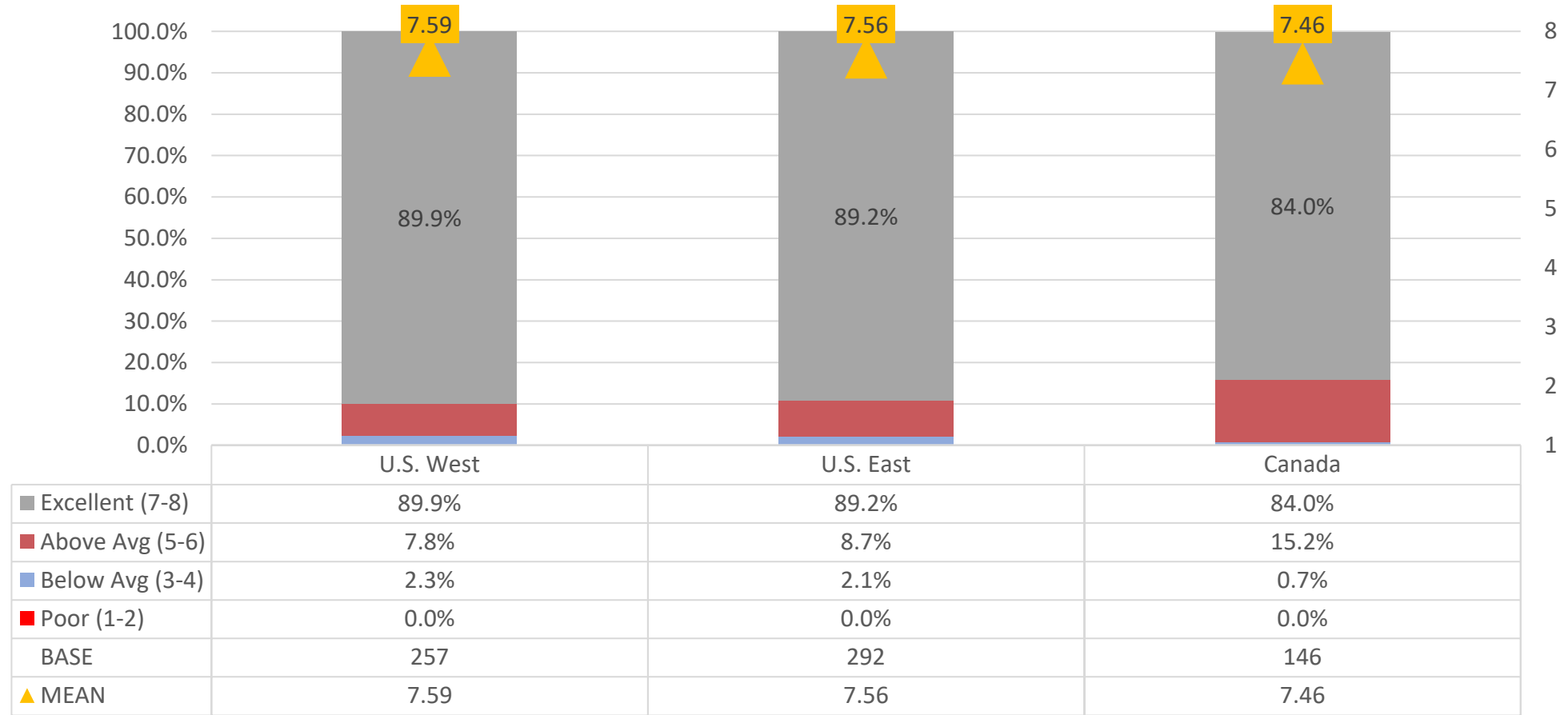
# LODGING/ ACCOMMODATIONS - KAUA'I

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



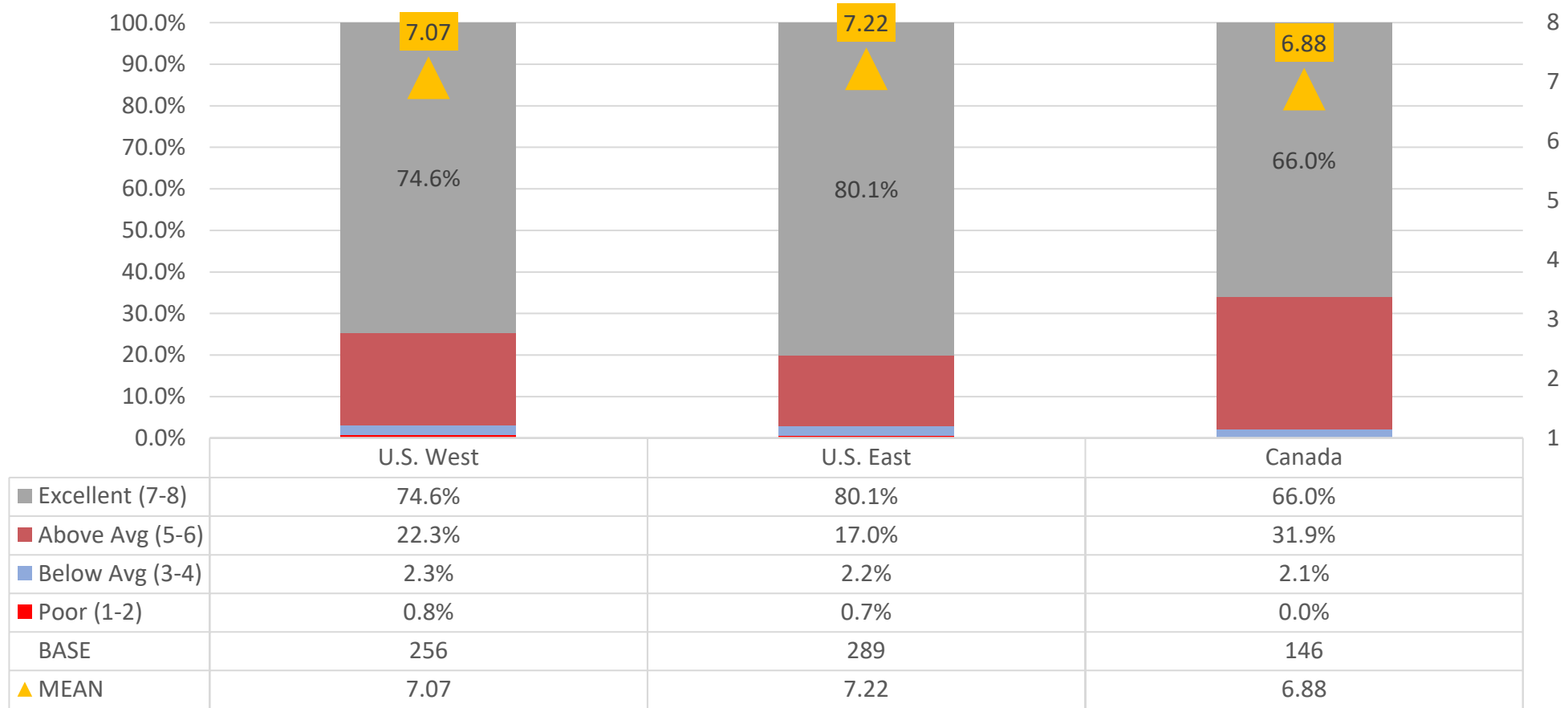
# BEACHES - KAUA'I

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



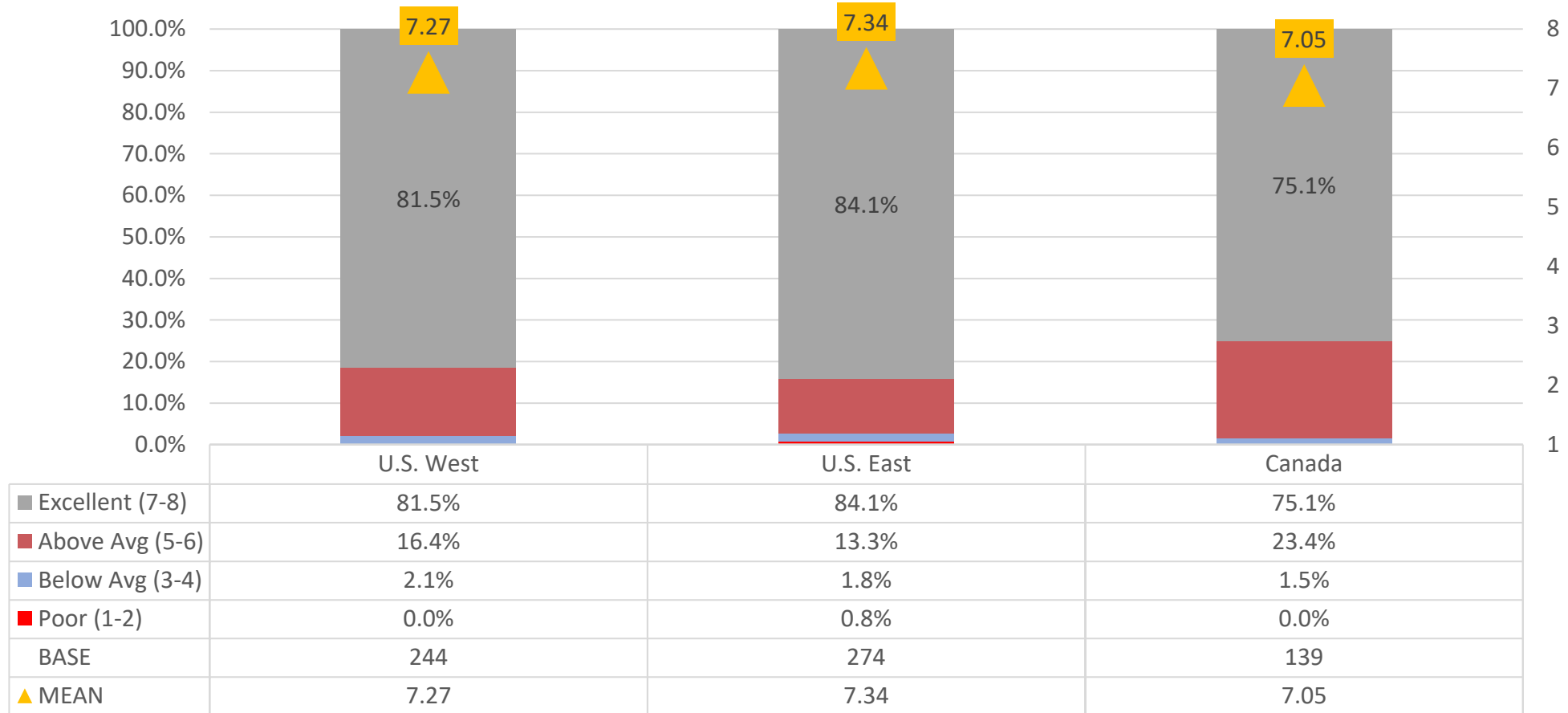
# PUBLIC AREAS - KAUA'I

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



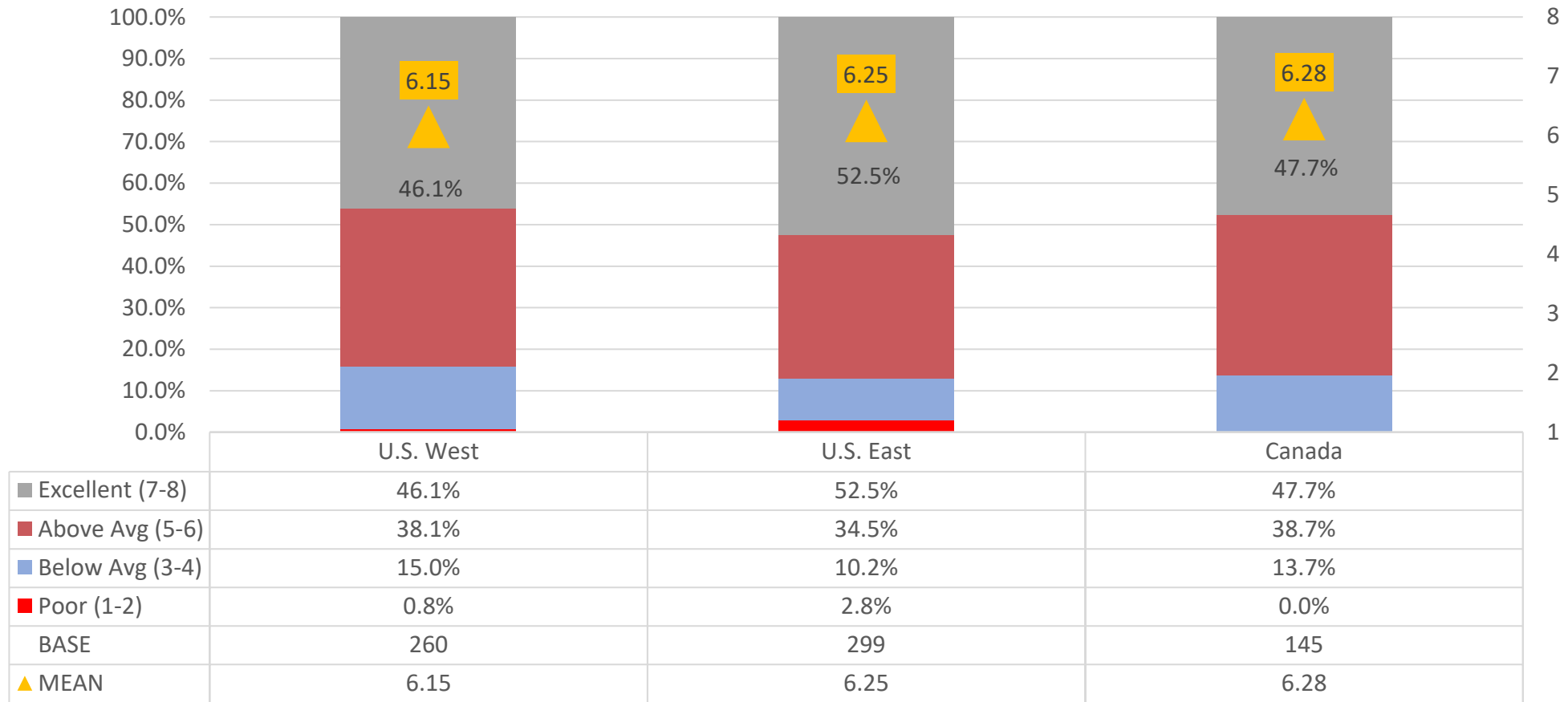
# PARKS - KAUA'I

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



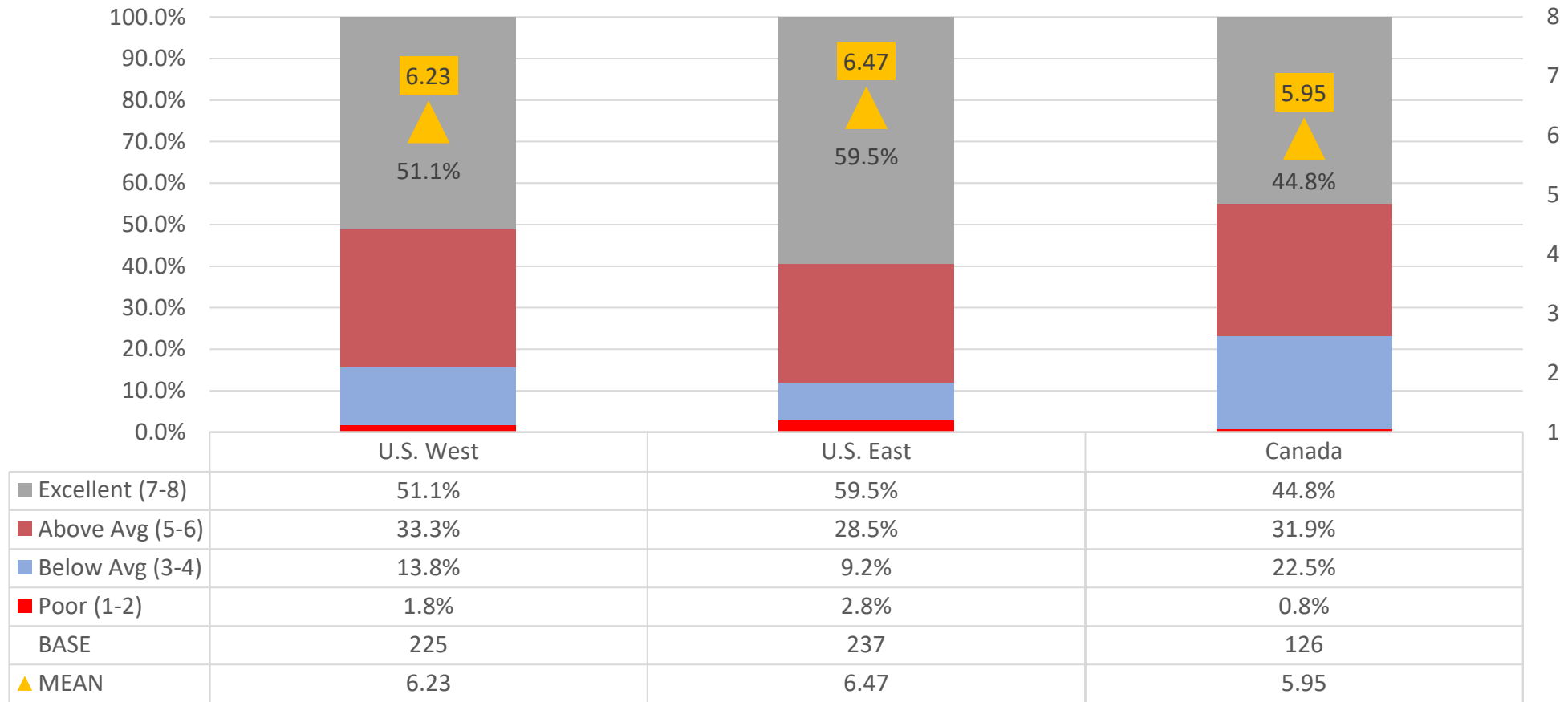
# ROADS - KAUA'I

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



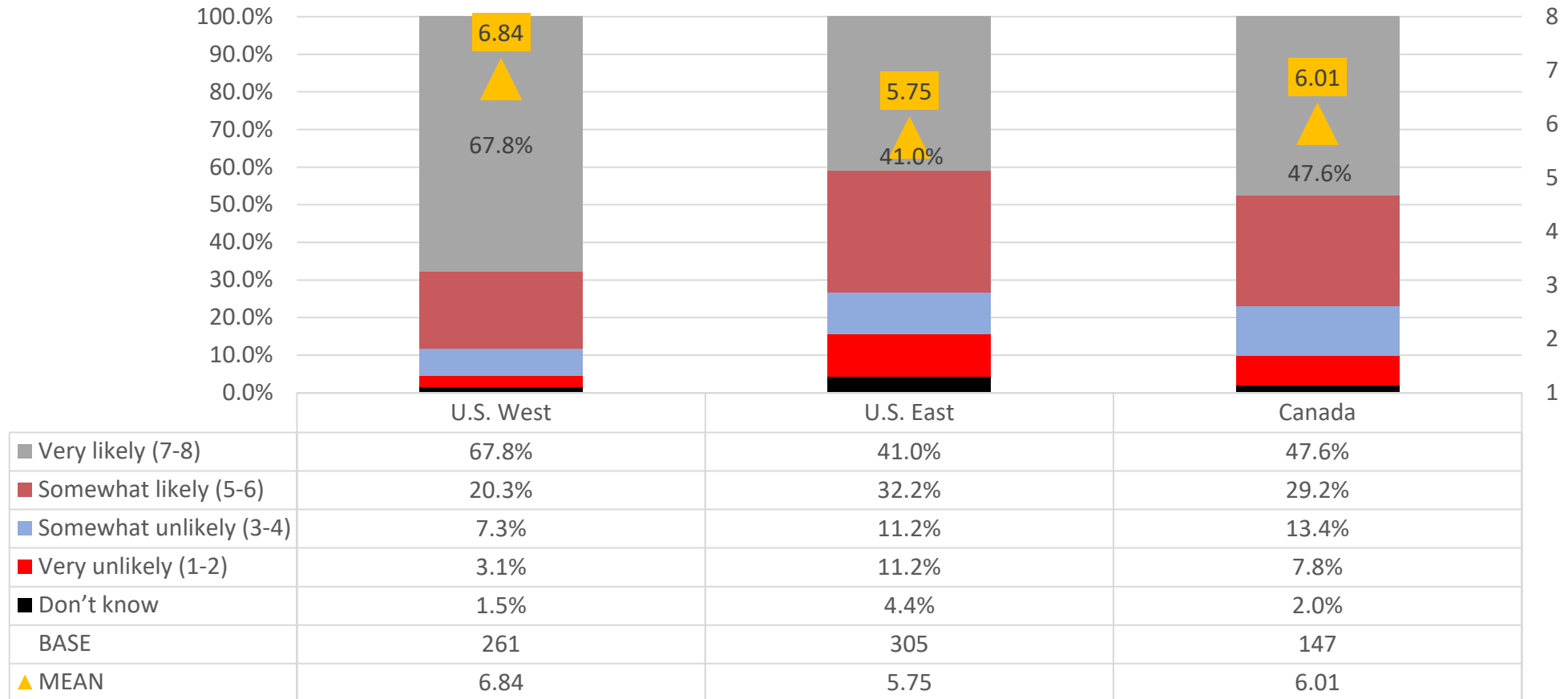
# TRANSPORTATION ON ISLAND - KAUA'I

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



# LIKELIHOOD OF RETURN VISIT - KAUA'I

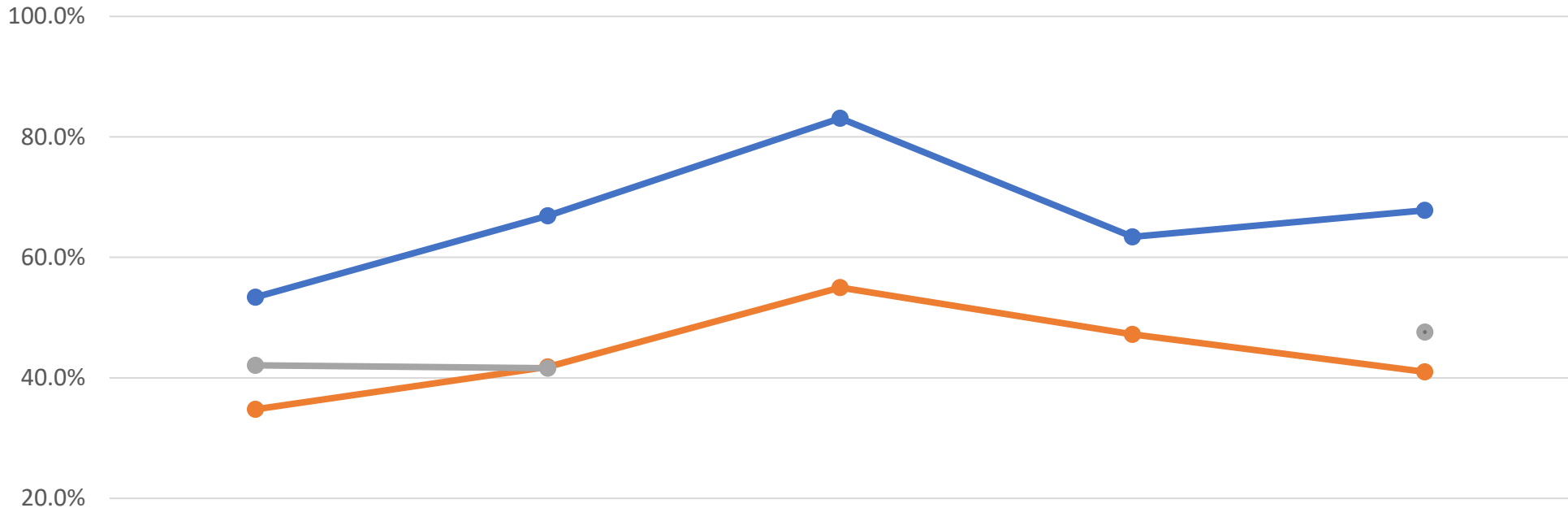
8-pt Rating Scale  
8=Very likely/ 1=Very unlikely





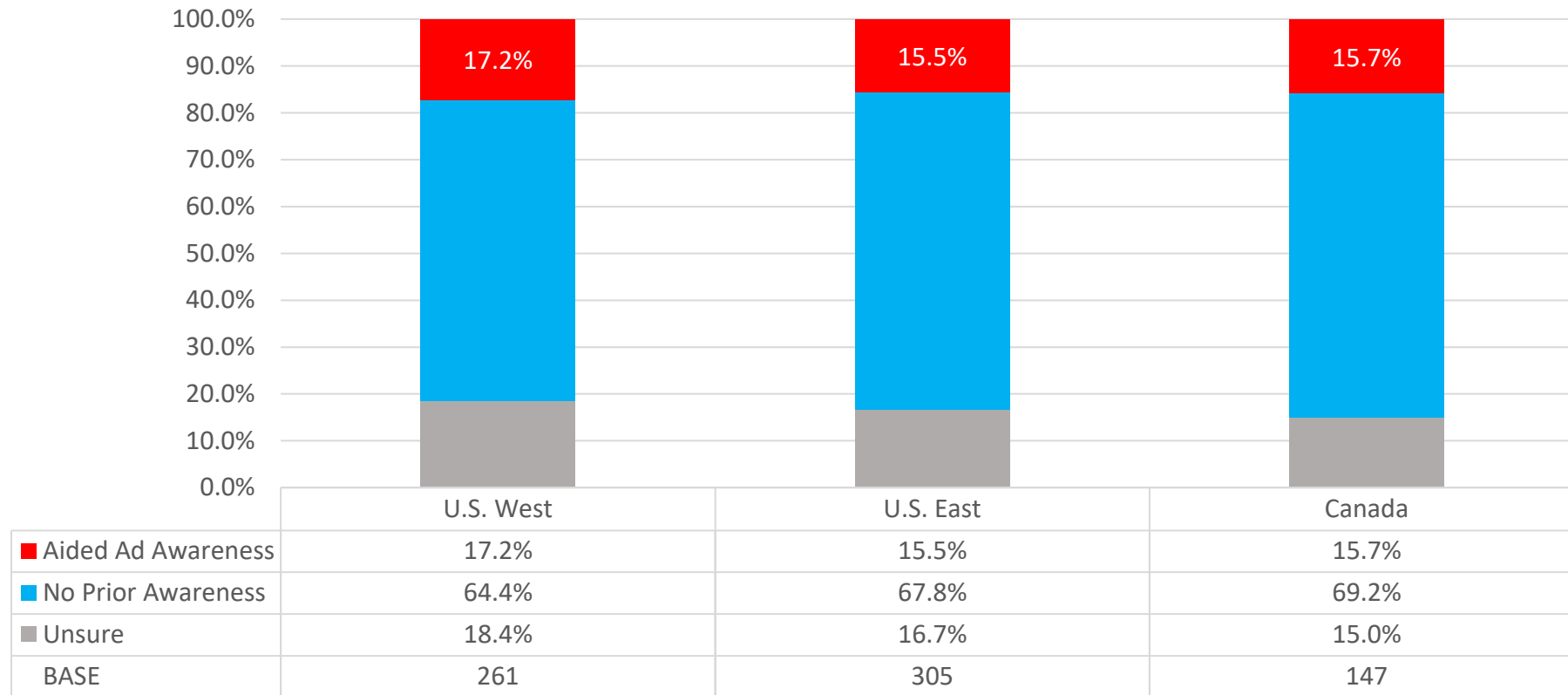
# LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q1 2022 P
U.S. West	53.4%	66.9%	83.1%	63.4%	67.8%
U.S. East	34.8%	41.8%	55.0%	47.2%	41.0%
Canada	42.1%	41.6%			47.6%

# AIDED ADVERTISING AWARENESS - KAUA'I



# MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Canada
<b>Famous landmarks or imagery/ natural beauty</b>	41.4%	55.8%	49.4%
<b>Outdoor or sporting activities/ events</b>	22.2%	20.9%	17.0%
<b>Hawaiian cultural events</b>	6.9%	6.9%	5.5%
<b>Social media posts/ videos</b>	8.0%	8.4%	12.7%
<b>Hawaiian music</b>	4.2%	3.2%	6.3%
<b>Television programs or movies filmed in Hawai'i</b>	3.5%	4.8%	7.2%
<b>BASE</b>	261	305	147

# ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Canada
<b>Fern Grotto</b>	8.8%	12.7%	14.2%
<b>Hanalei Town</b>	60.5%	49.5%	64.4%
<b>Hanalei Beach</b>	52.5%	45.3%	62.1%
<b>Kalapaki Beach</b>	25.3%	22.7%	28.8%
<b>Kalalau Trail</b>	16.1%	17.3%	18.9%
<b>Bike Path in Kapaa</b>	5.4%	7.6%	15.9%
<b>Kaua'i Museum</b>	4.2%	2.7%	2.7%
<b>Ke'e Beach</b>	13.0%	18.2%	16.5%
<b>Kilauea Lighthouse</b>	25.3%	22.7%	34.0%
<b>Koke'e</b>	8.8%	11.6%	19.9%

# ATTRACTIONS- KAUA'I

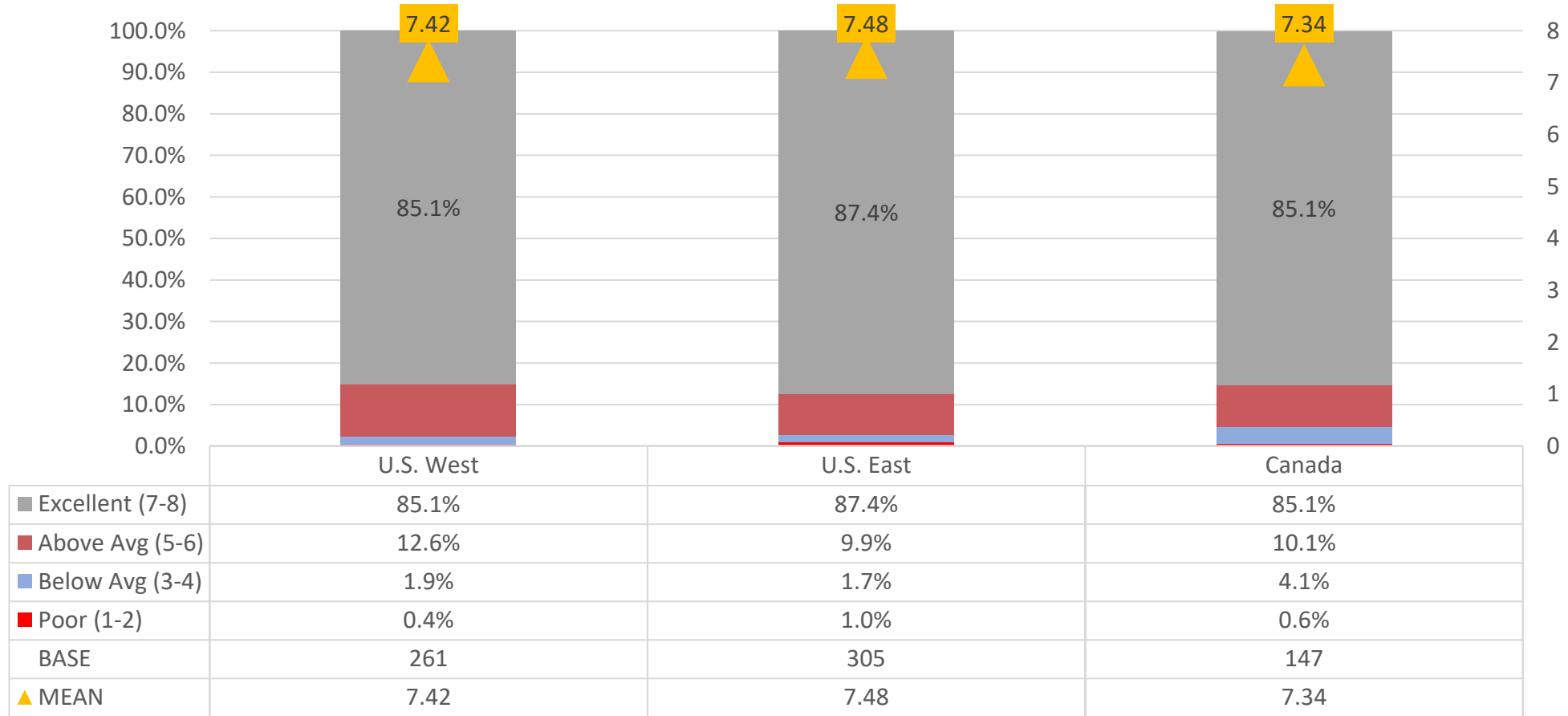
	U.S. West	U.S. East	Canada
<b>Koke'e Museum</b>	4.6%	3.2%	6.9%
<b>Na Aina Kai Gardens</b>	1.5%	2.1%	0.0%
<b>Napali Coast</b>	42.9%	60.6%	47.6%
<b>Allerton Garden</b>	8.1%	5.6%	6.0%
<b>Limahuli Garden</b>	6.5%	4.8%	7.4%
<b>Old Koloa Town</b>	42.2%	29.9%	42.9%
<b>Opaeka'a Falls</b>	15.3%	19.1%	17.7%
<b>Po'ipu Beach</b>	72.8%	64.8%	68.5%
<b>Smith's Tropical Paradise Gardens</b>	8.4%	9.9%	4.7%
<b>Spouting Horn</b>	34.9%	32.8%	36.3%
<b>Wailua Falls</b>	39.4%	43.1%	47.2%

# ATTRACTIONS- KAUA'I

	U.S. West	U.S. East	Canada
Wailua River	26.8%	28.0%	27.8%
Waimea Canyon	51.7%	60.5%	67.4%
Disc Golf	1.5%	1.0%	2.1%
Mini Golf	4.2%	0.3%	4.2%

# FRIENDLINESS OF KAUA'I RESIDENTS

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

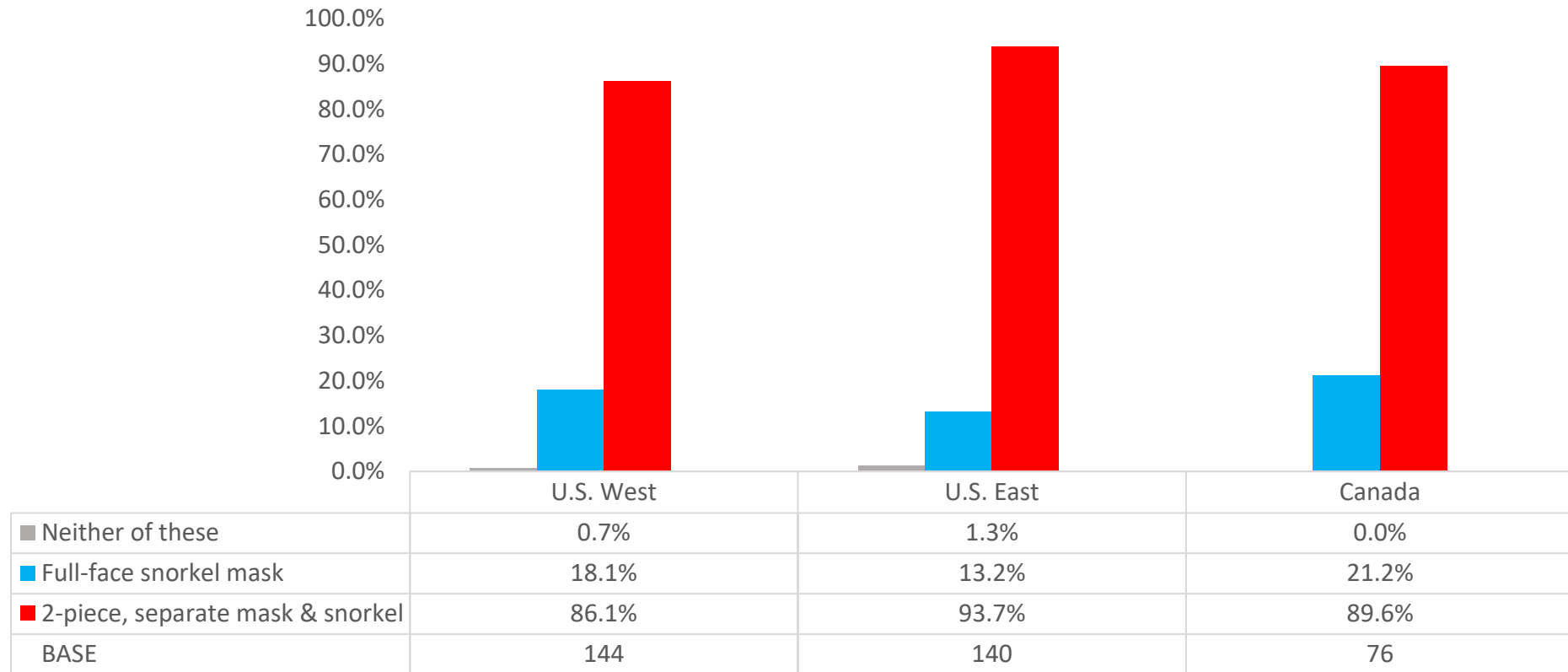


# TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Canada
Been here before	44.9%	22.5%	29.9%
Friend recommendation	32.1%	40.2%	33.7%
Location/ Never been, but went to other islands	3.8%	3.8%	4.3%
Visiting Family/ Friends	3.8%	3.4%	2.7%
Article/ Blog	1.9%	5.4%	5.8%
Attending Conference/ Event	3.4%	1.2%	2.6%
Own a timeshare	2.7%	0.6%	2.1%
Cruise line stop/part of tour	0.0%	5.8%	5.3%
Social Media Post	1.1%	2.9%	3.3%
Other (please specify)	1.1%	1.9%	1.3%
Nature/ Beauty/ Scenery	0.8%	1.5%	1.3%
Travel Agent	0.0%	2.9%	2.6%



# SNORKELING EQUIPMENT USED - KAUA'I



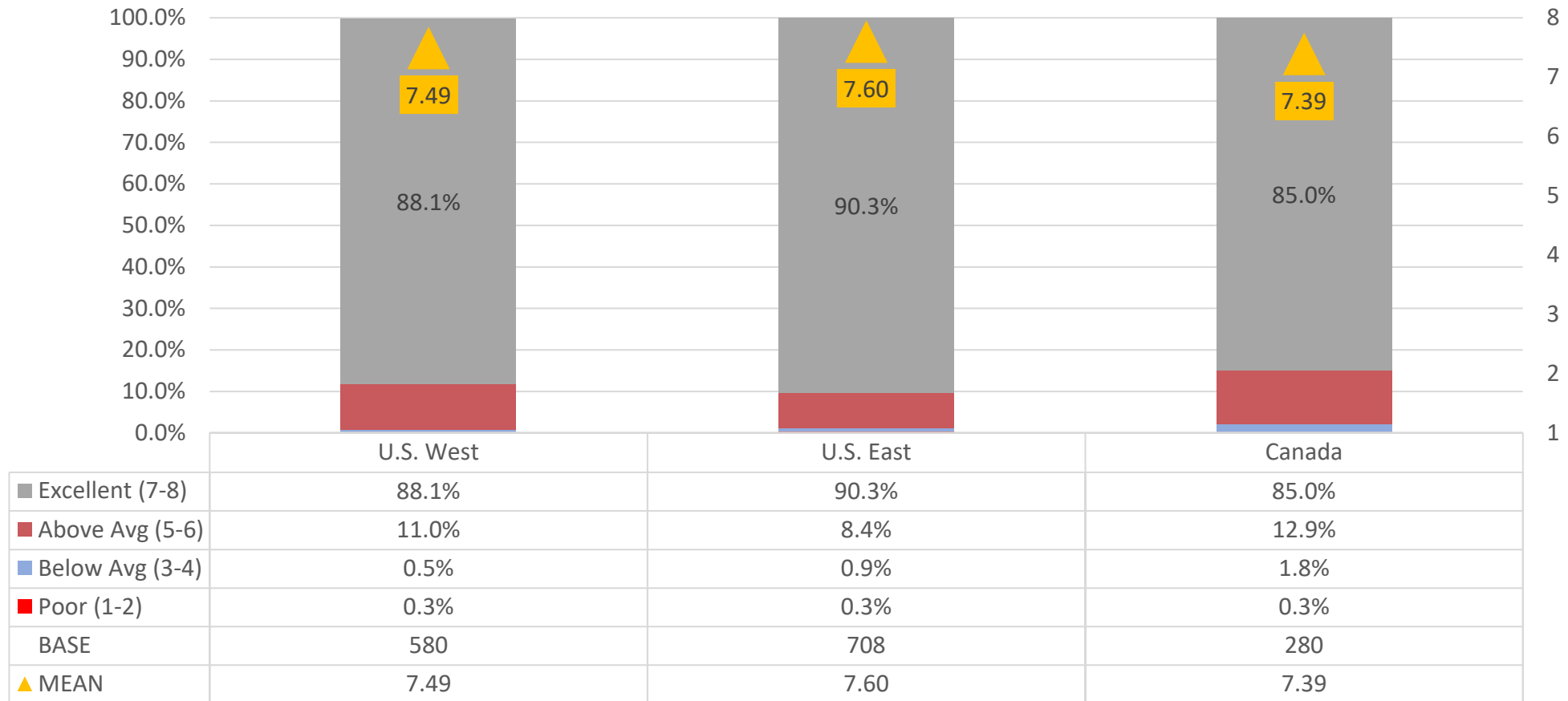
# SNORKELING OCEAN SAFETY- KAUA'I

	U.S. West	U.S. East	Canada
<b>Did not have to be assisted or rescued</b>	97.9%	97.8%	98.8%
<b>Yes, needed assistance using 2 piece mask &amp; snorkel</b>	1.4%	2.2%	1.2%
<b>Yes, while doing another type of ocean activity</b>	0.7%	0.0%	0.0%
<b>BASE</b>	143	138	76

# Section 7 – MAUI

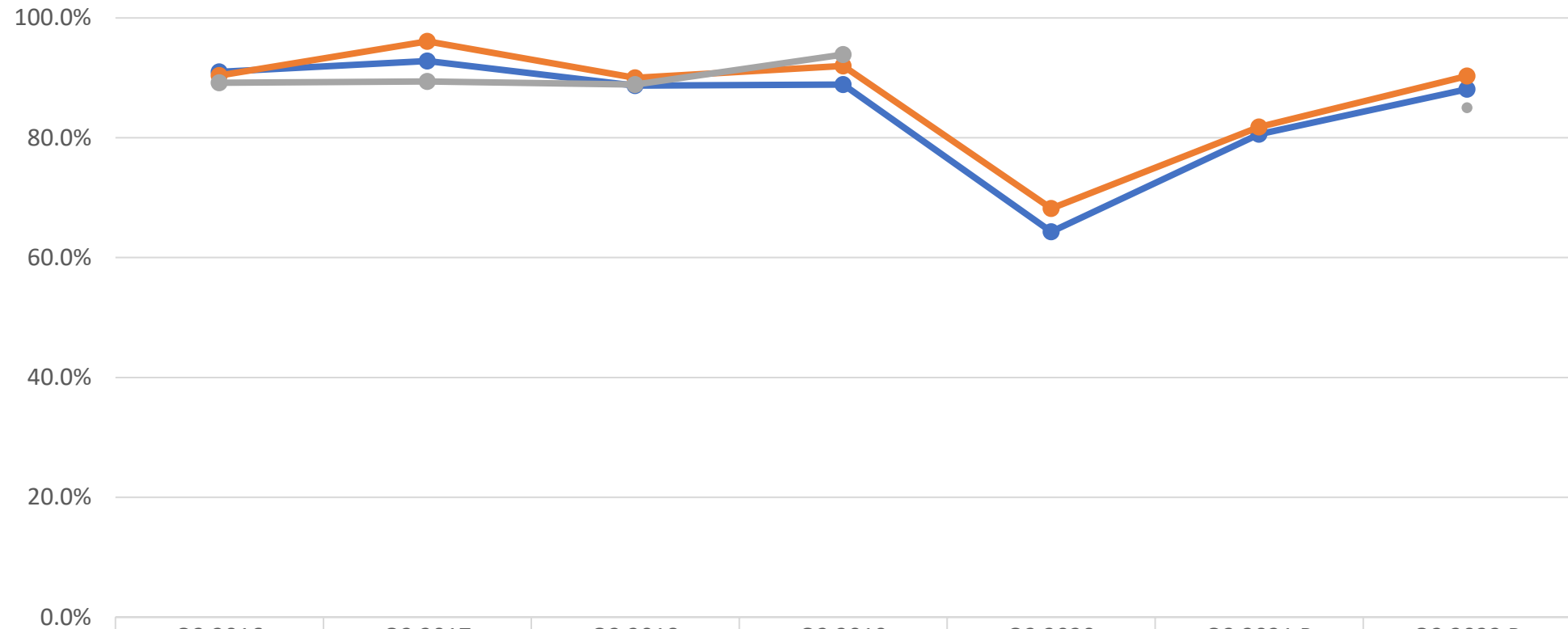
# SATISFACTION - MAUI

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



# SATISFACTION - MAUI

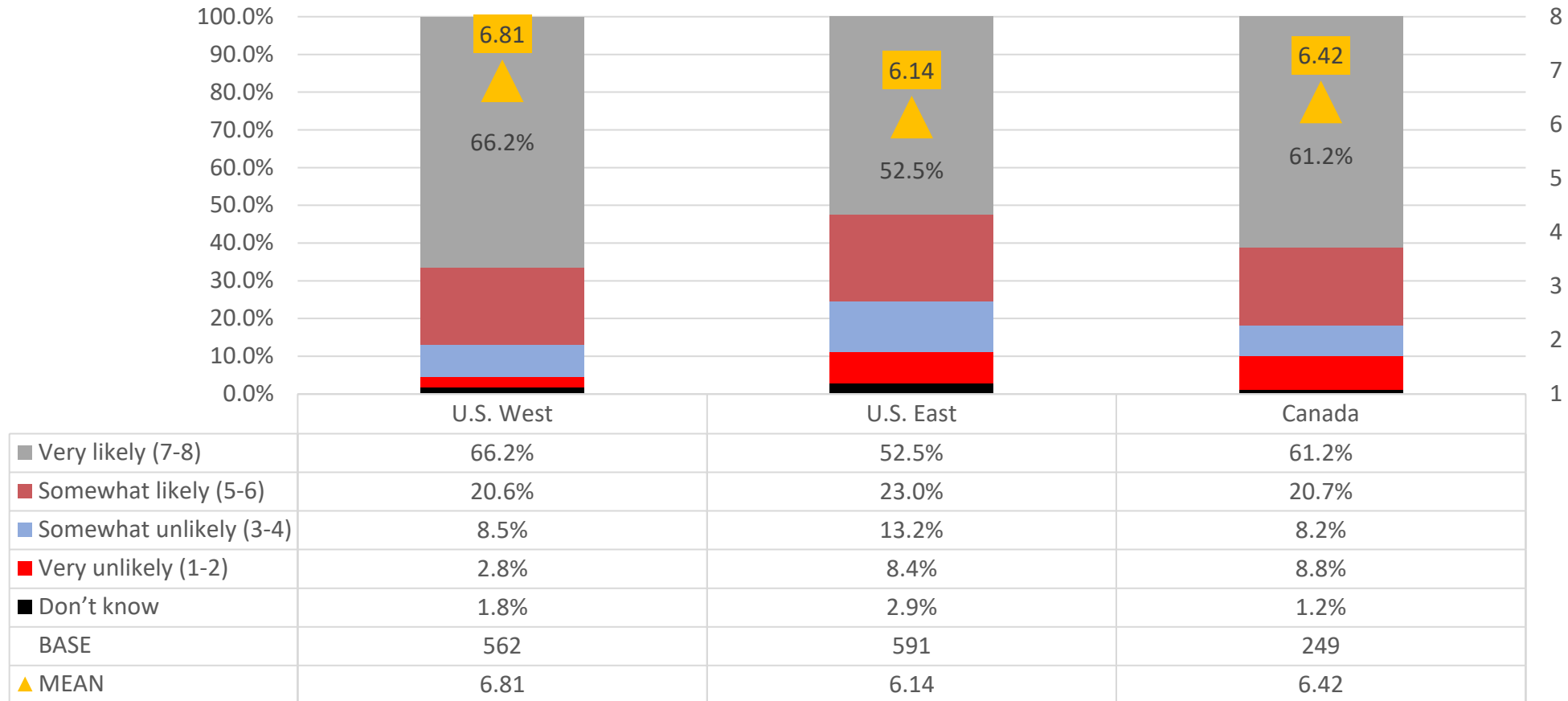
Tracking Data – Rating of “Excellent” (7-8)



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	91.0%	92.8%	88.7%	88.9%	64.3%	80.6%	88.1%
U.S. East	90.4%	96.1%	90.0%	92.0%	68.2%	81.8%	90.3%
Canada	89.2%	89.4%	88.9%	93.9%			85.0%

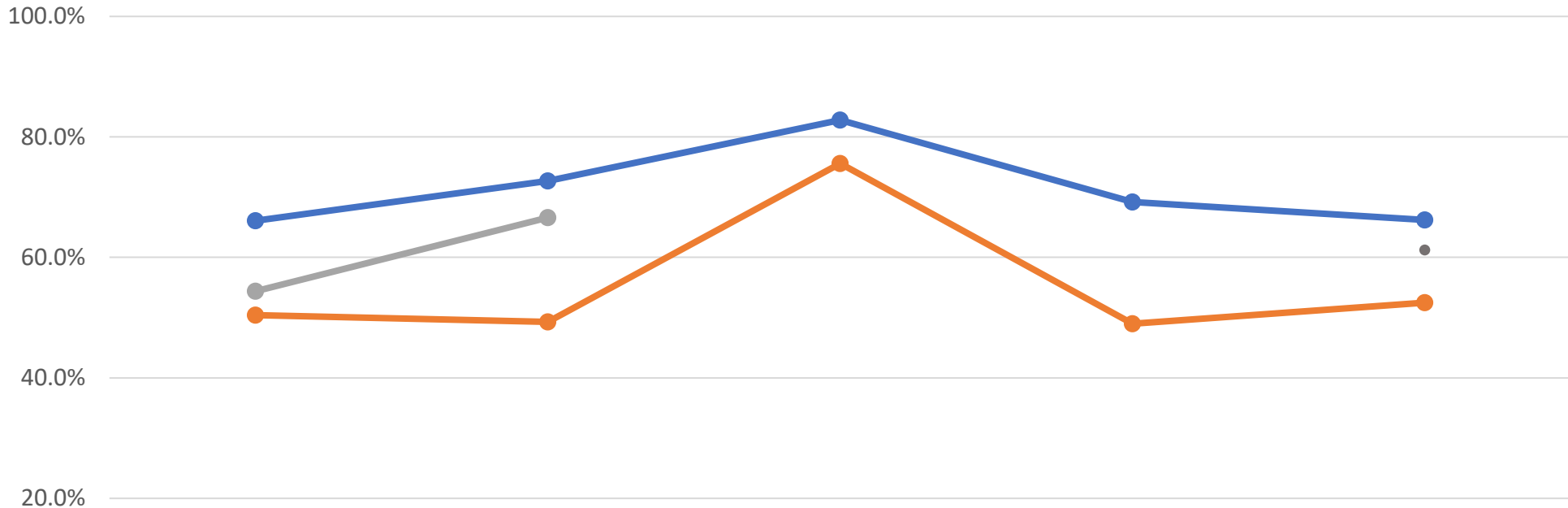
# LIKELIHOOD OF RETURN VISIT - MAUI

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



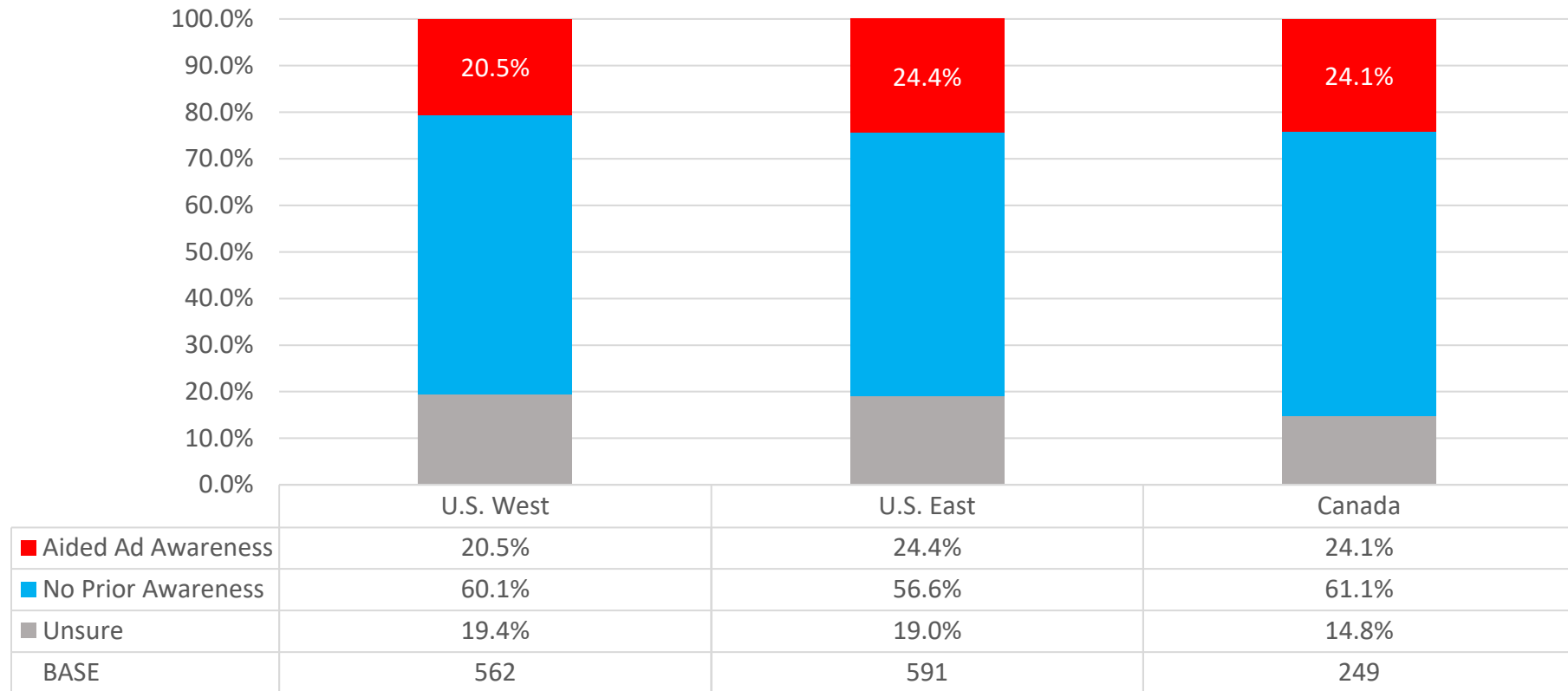
# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	66.1%	72.7%	82.8%	69.2%	66.2%
U.S. East	50.4%	49.3%	75.6%	49.0%	52.5%
Canada	54.4%	66.6%			61.2%

# AIDED ADVERTISING AWARENESS - MAUI





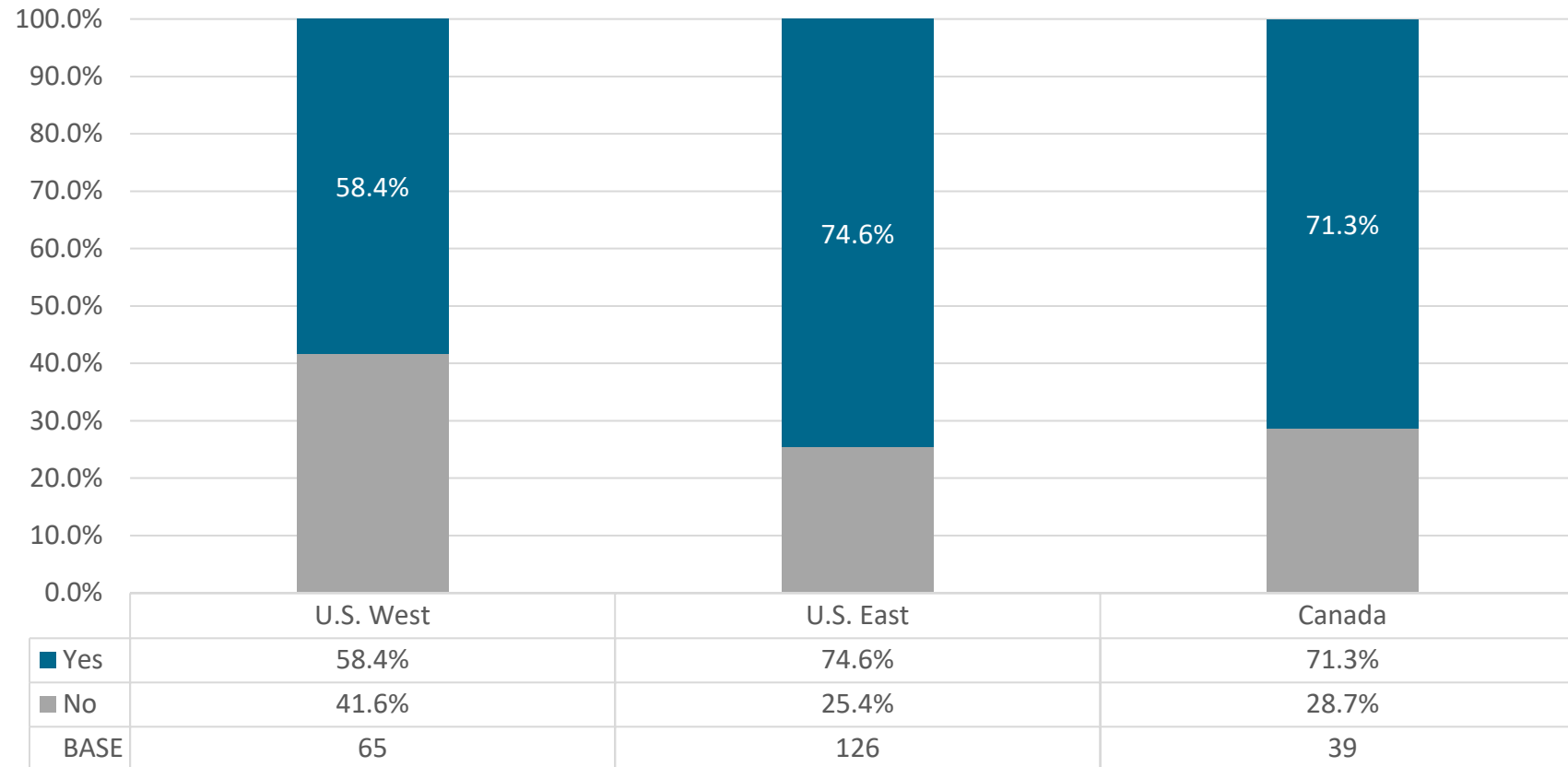
# MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	38.1%	44.6%	39.0%
Outdoor or sporting activities/ events	18.9%	17.8%	14.8%
Hawaiian cultural events	9.2%	10.7%	9.9%
Social media posts/ videos	8.4%	13.6%	16.5%
Hawaiian music	6.6%	4.6%	6.8%
Television programs or movies filmed in Hawai'i	3.9%	4.5%	9.7%
<b>BASE</b>	562	591	249

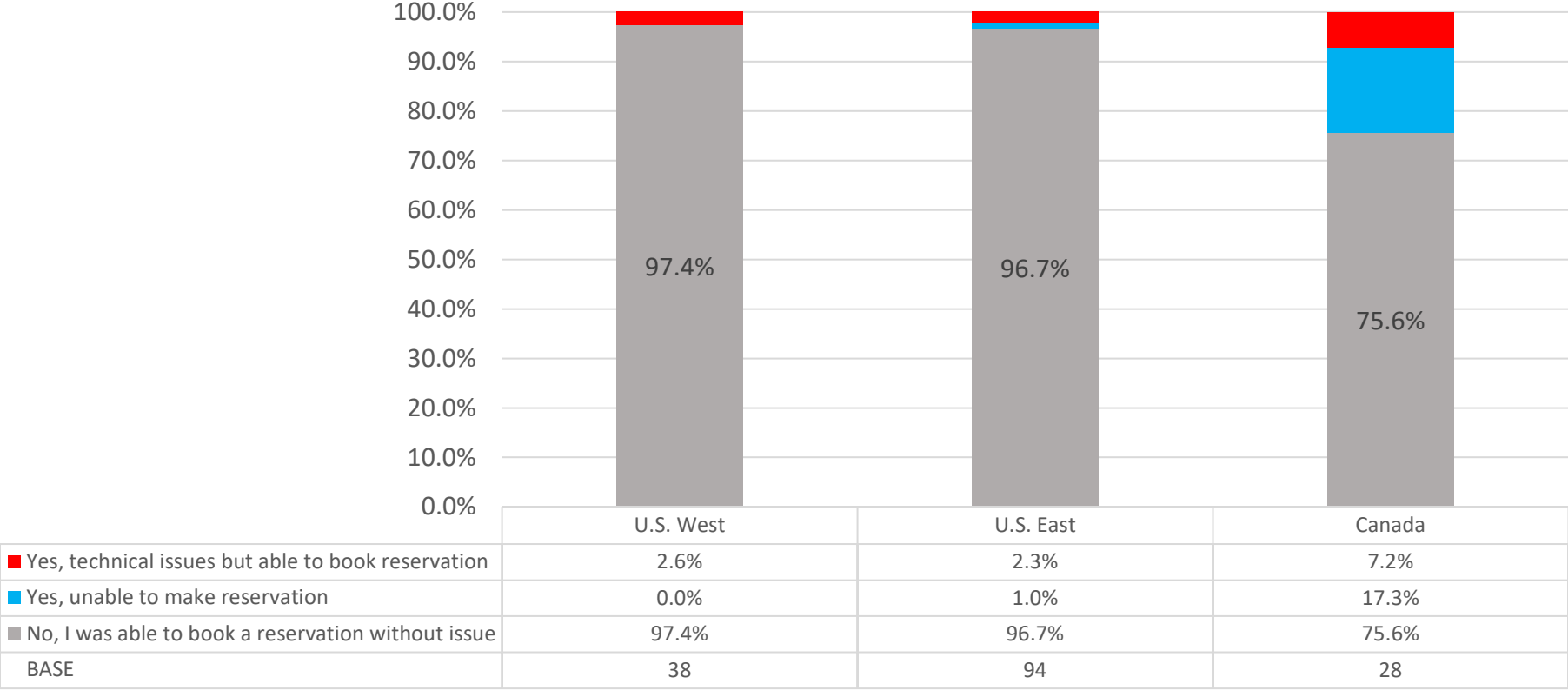
# ATTRACTIONS- MAUI

	U.S. West	U.S. East	Canada
Alexander & Baldwin Sugar Museum	1.8%	1.0%	1.2%
Aquarium Maui /Maui Ocean Center	15.9%	15.5%	16.3%
Baldwin Missionary Home Museum	3.0%	3.9%	5.3%
Hale Pa'i Printing House	0.4%	0.0%	0.0%
Haleakala National Park	28.5%	50.7%	41.7%
Haleki'i Pihana Heiau State Monument	1.6%	2.2%	1.1%
Hana Cultural Center	7.3%	11.2%	12.8%
'Iao Valley State Monument	15.5%	14.4%	14.9%
Kepaniwai Park & Heritage Gardens	3.6%	4.9%	3.9%
Kula Botanical Garden	7.1%	8.1%	5.9%
Maui Historical Society Bailey House Museum	1.4%	1.5%	0.8%
Wainapanapa State Park	11.6%	21.0%	15.4%
Whaler's Village Museum	15.0%	16.5%	14.5%
Wo Hing Temple Museum	2.0%	1.7%	1.3%

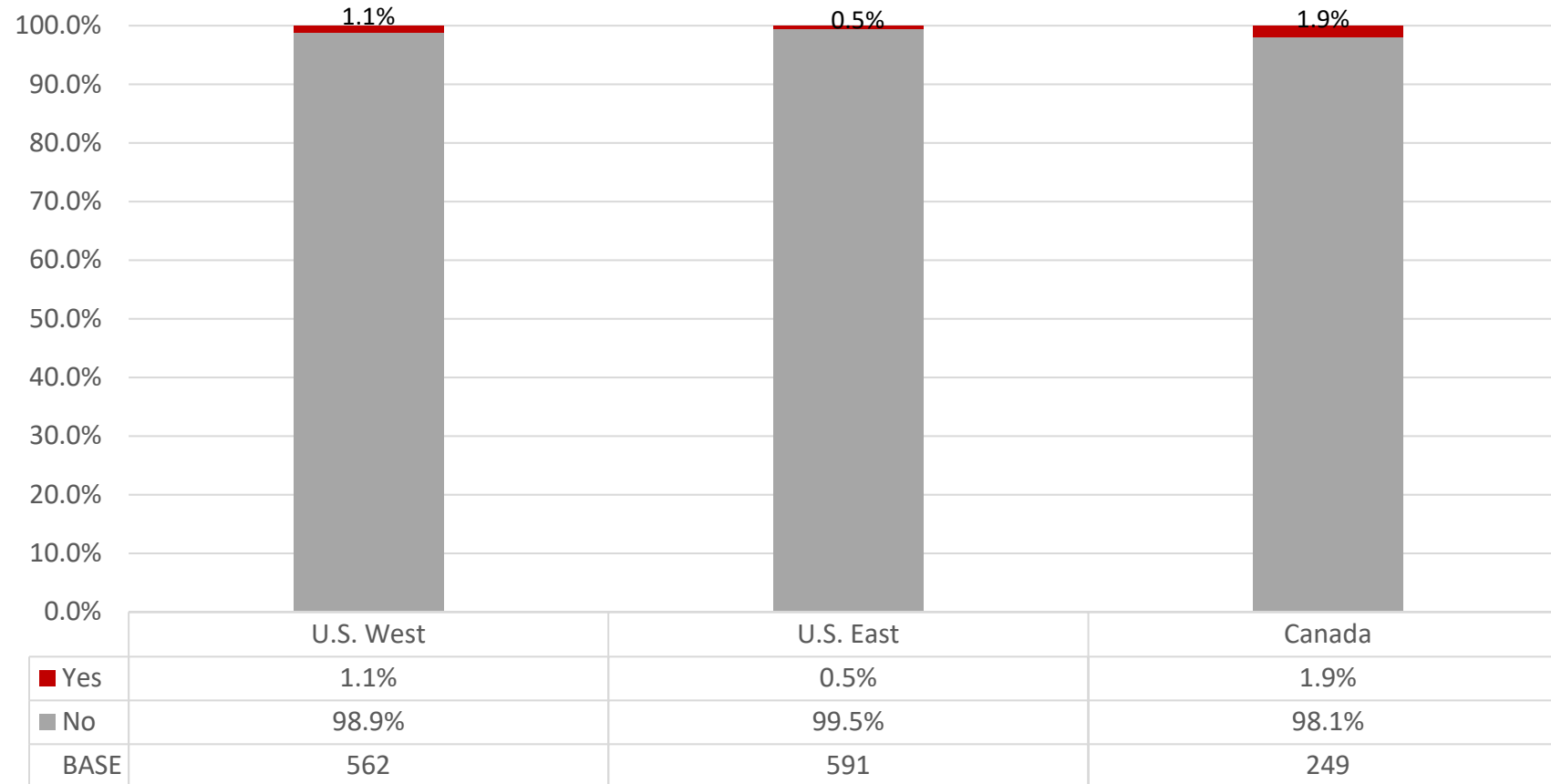
# WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



# WAINAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



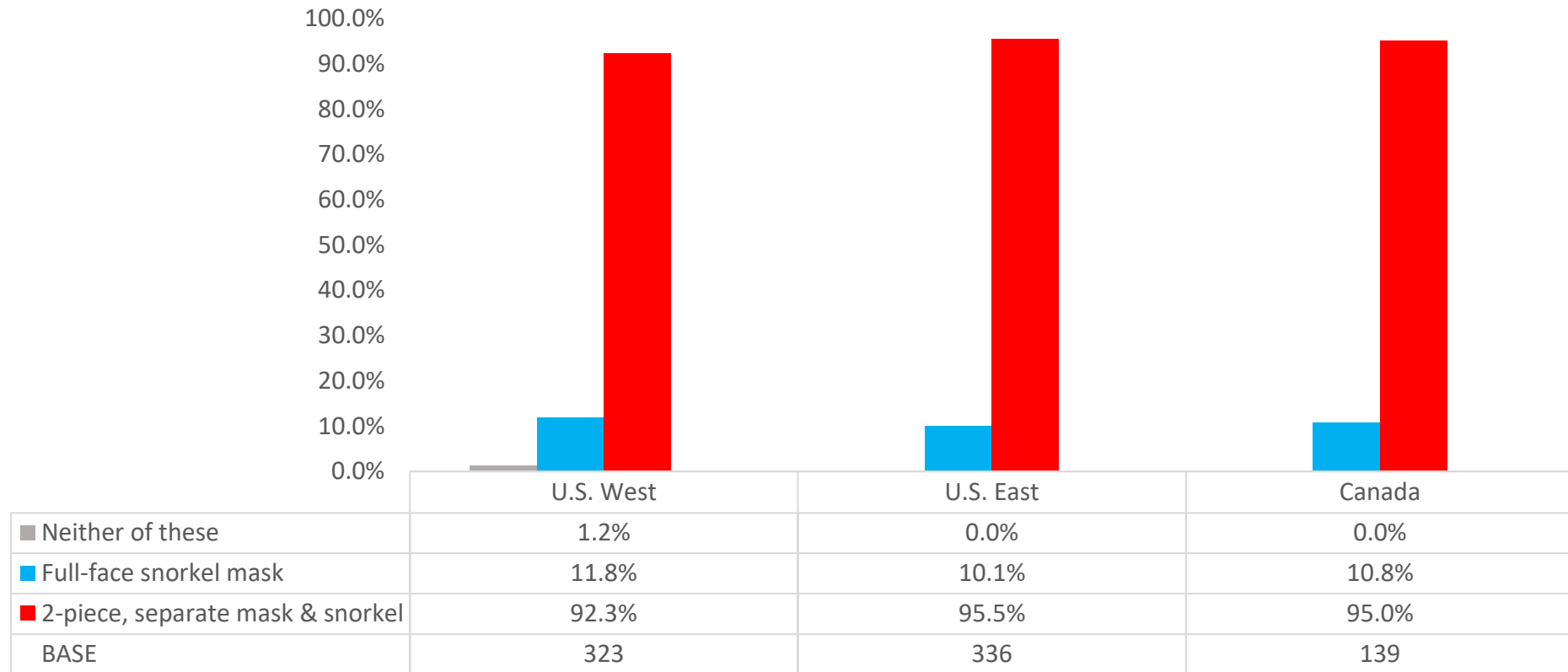
# VISITED MAUI FOR SPECIFIC EVENT



# VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Canada
Maui Marathon	16.7%	0.0%	37.9%
Wedding/ honeymoon/ anniversary/ birthday/ funeral/ graduation	0.0%	33.3%	43.1%
Convention/ conference/ retreat/ seminar/ workshop	33.2%	0.0%	0.0%
Other festival/ concert	16.7%	0.0%	0.0%
Kapalua Food & Wine Festival	16.7%	33.3%	0.0%
Hawai'i Food & Wine Festival	16.7%	33.3%	19.0%
BASE	6	3	5

# SNORKELING EQUIPMENT USED - MAUI



# SNORKELING OCEAN SAFETY- MAUI

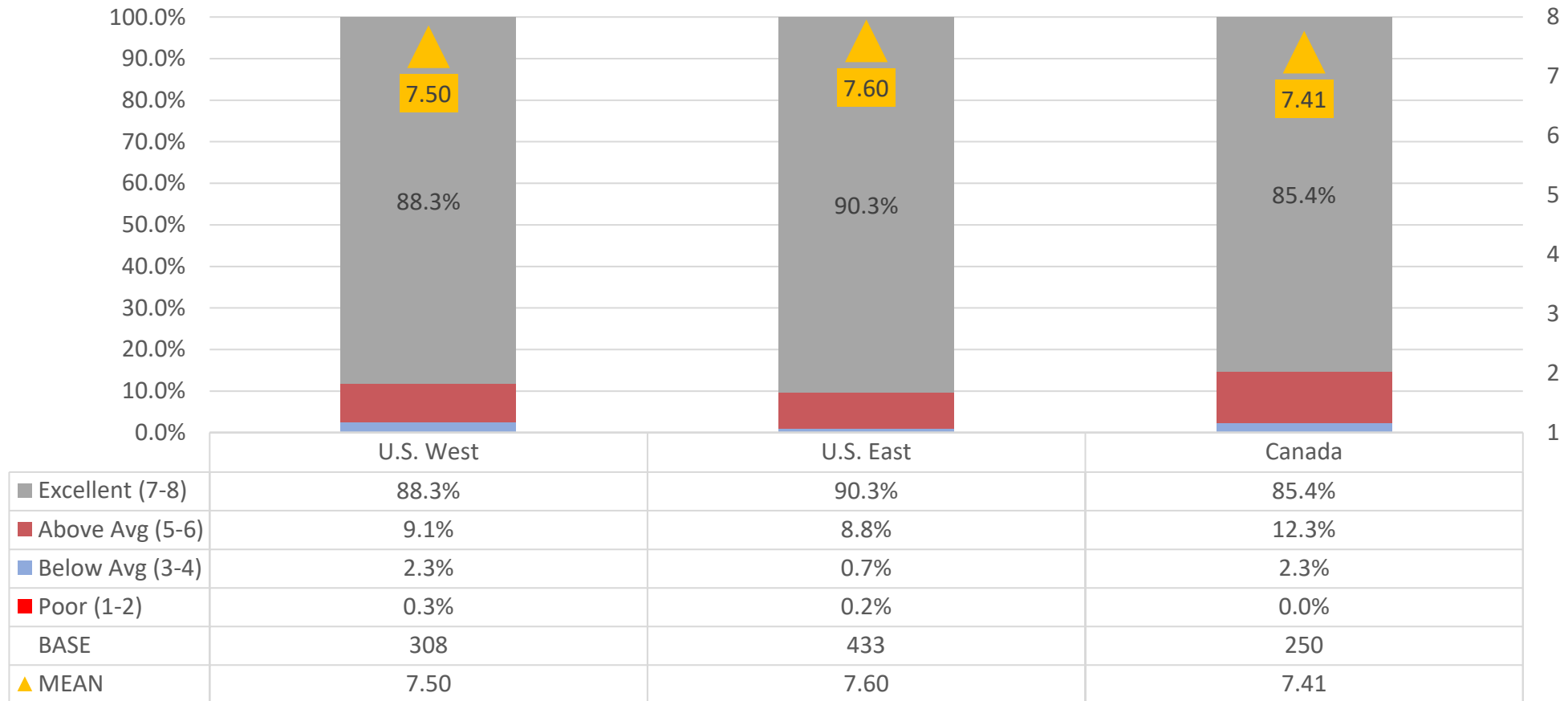
	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	97.5%	98.3%	98.7%
Yes, needed assistance using 2 piece mask & snorkel	1.9%	1.7%	1.3%
Yes, while doing another type of ocean activity	0.6%	0.0%	0.0%
BASE	319	336	139



# Section 8 – ISLAND OF HAWAII

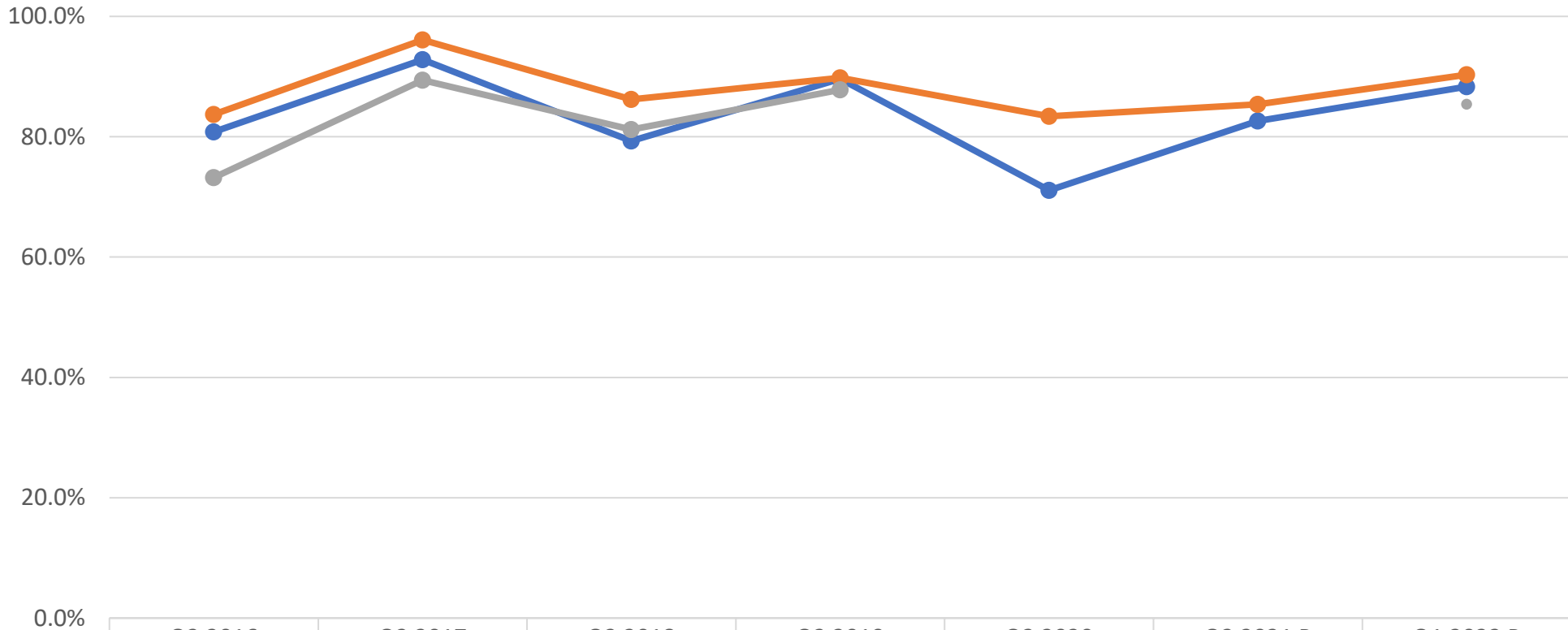
# SATISFACTION - ISLAND OF HAWAI'I

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



# SATISFACTION - ISLAND OF HAWAI'I

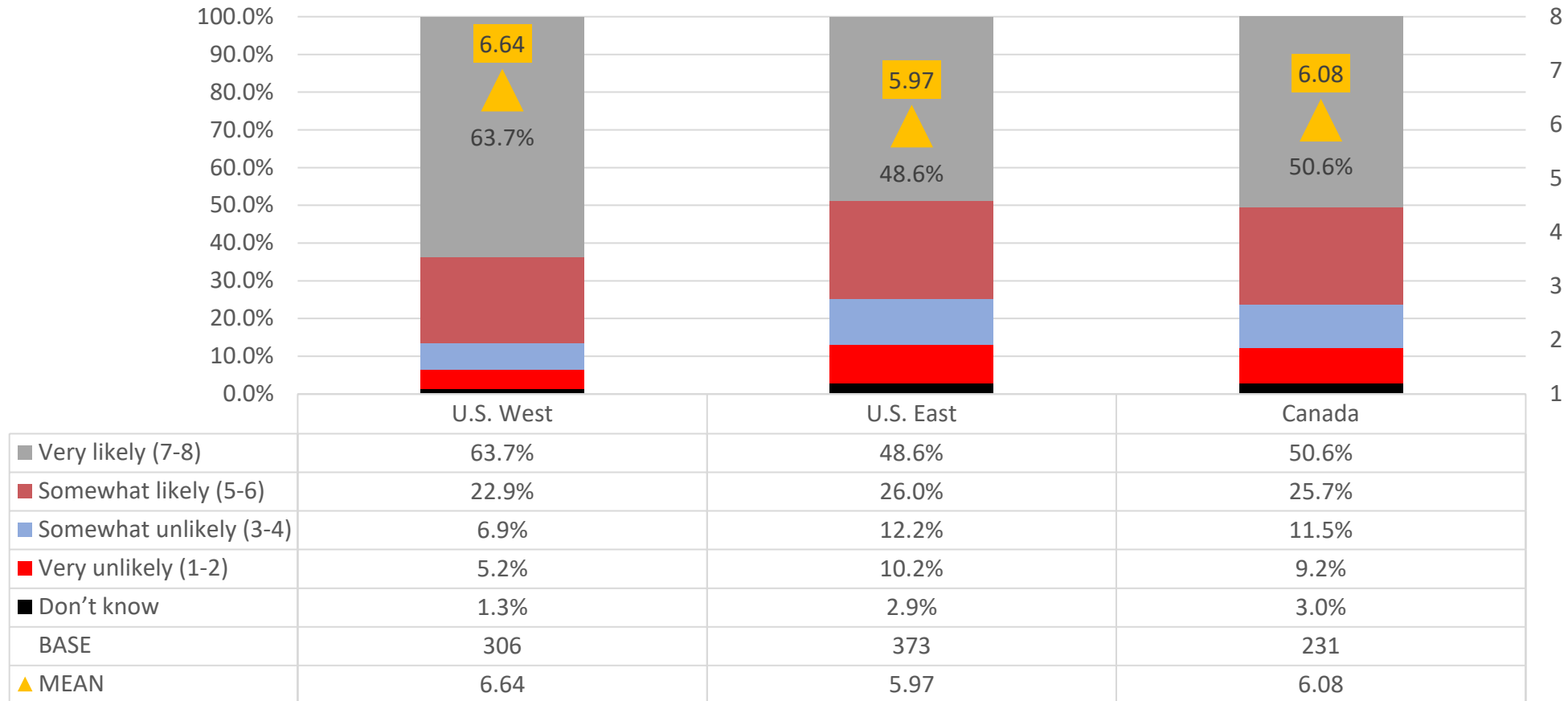
Tracking Data – Rating of “Excellent” (7-8)



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q1 2022 P
U.S. West	80.8%	92.8%	79.3%	89.6%	71.1%	82.6%	88.3%
U.S. East	83.7%	96.1%	86.2%	89.8%	83.4%	85.4%	90.3%
Canada	73.2%	89.4%	81.2%	87.8%			85.4%

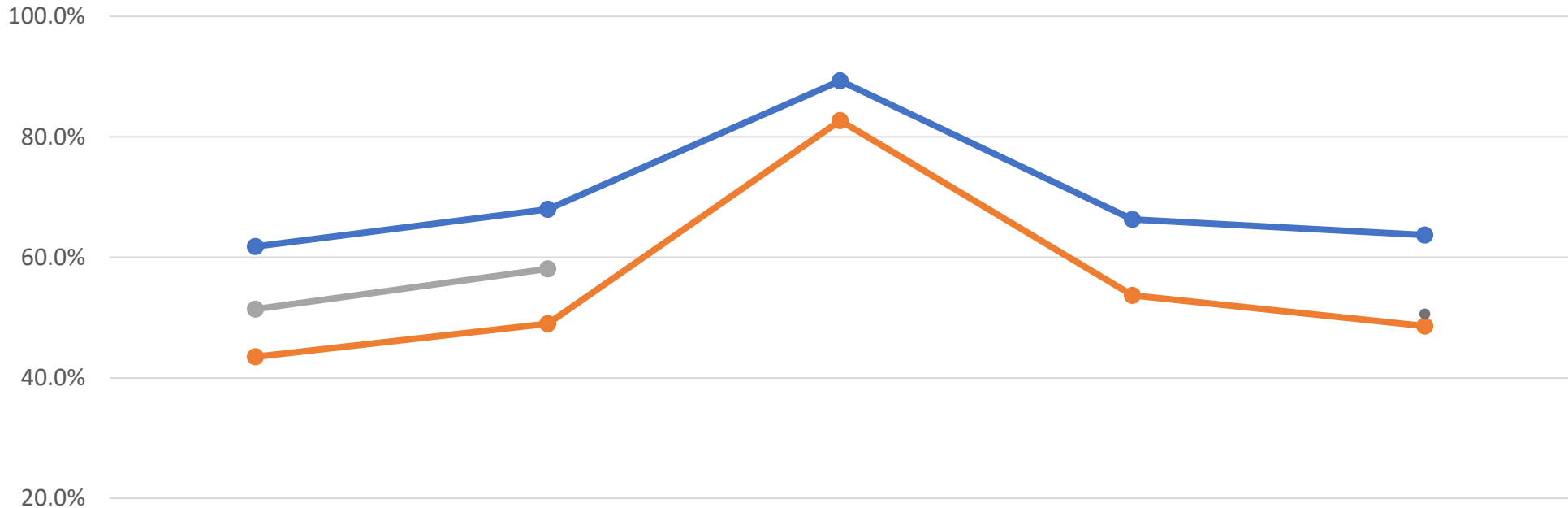
# LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

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



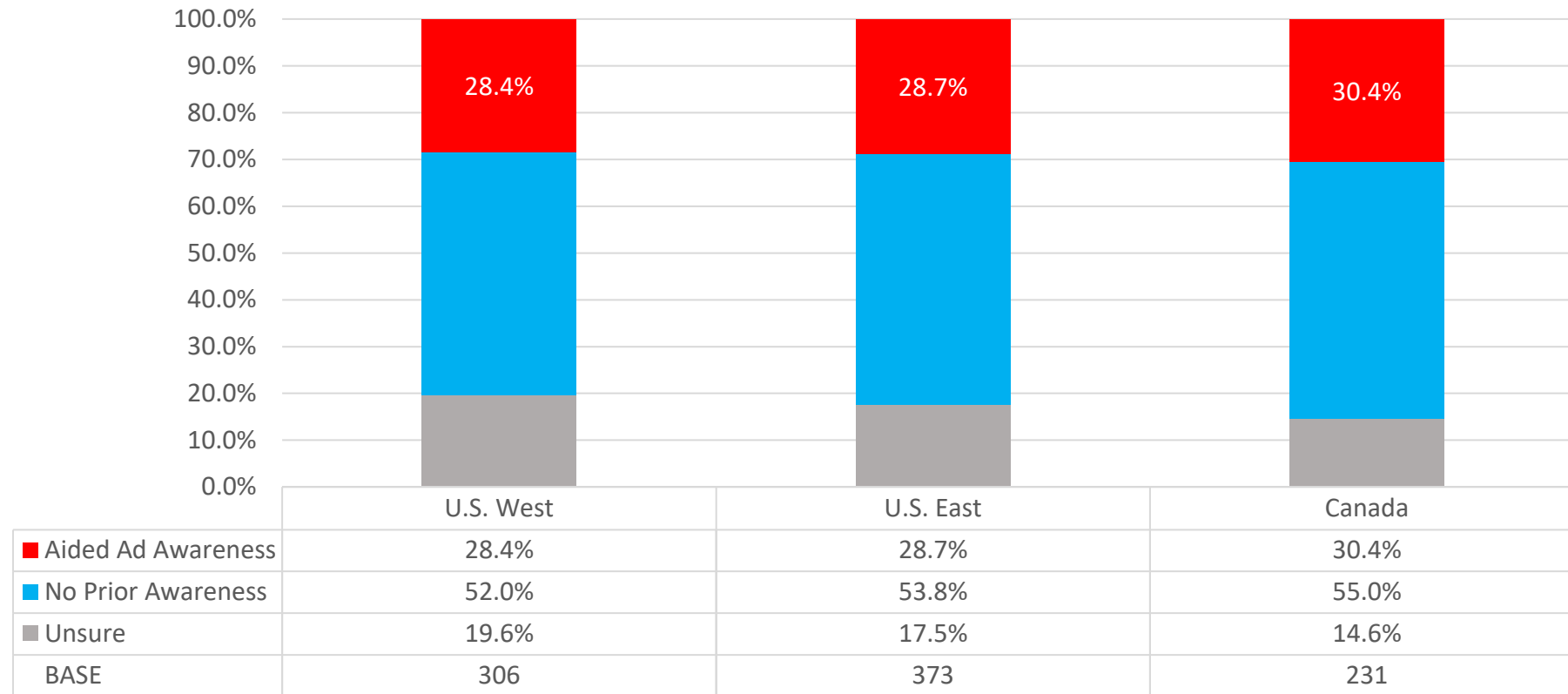
# LIKELIHOOD OF RETURN VISIT ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)



	Q2 2018	Q2 2019	Q2 2020	Q2 2021 P	Q2 2022 P
U.S. West	61.8%	68.0%	89.3%	66.3%	63.7%
U.S. East	43.5%	49.0%	82.7%	53.7%	48.6%
Canada	51.4%	58.1%			50.6%

# AIDED ADVERTISING AWARENESS ISLAND OF HAWAI'I



# MOTIVATING FACTORS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
Famous landmarks or imagery/ natural beauty	52.3%	58.7%	51.9%
Outdoor or sporting activities/ events	15.4%	22.0%	26.5%
Hawaiian cultural events	9.2%	13.9%	13.4%
Social media posts/ videos	8.8%	11.1%	10.3%
Hawaiian music	6.9%	6.8%	10.2%
Television programs or movies filmed in Hawai'i	4.6%	9.7%	10.7%
BASE	306	373	231

# ATTRACTIONS- ISLAND OF HAWAI'I

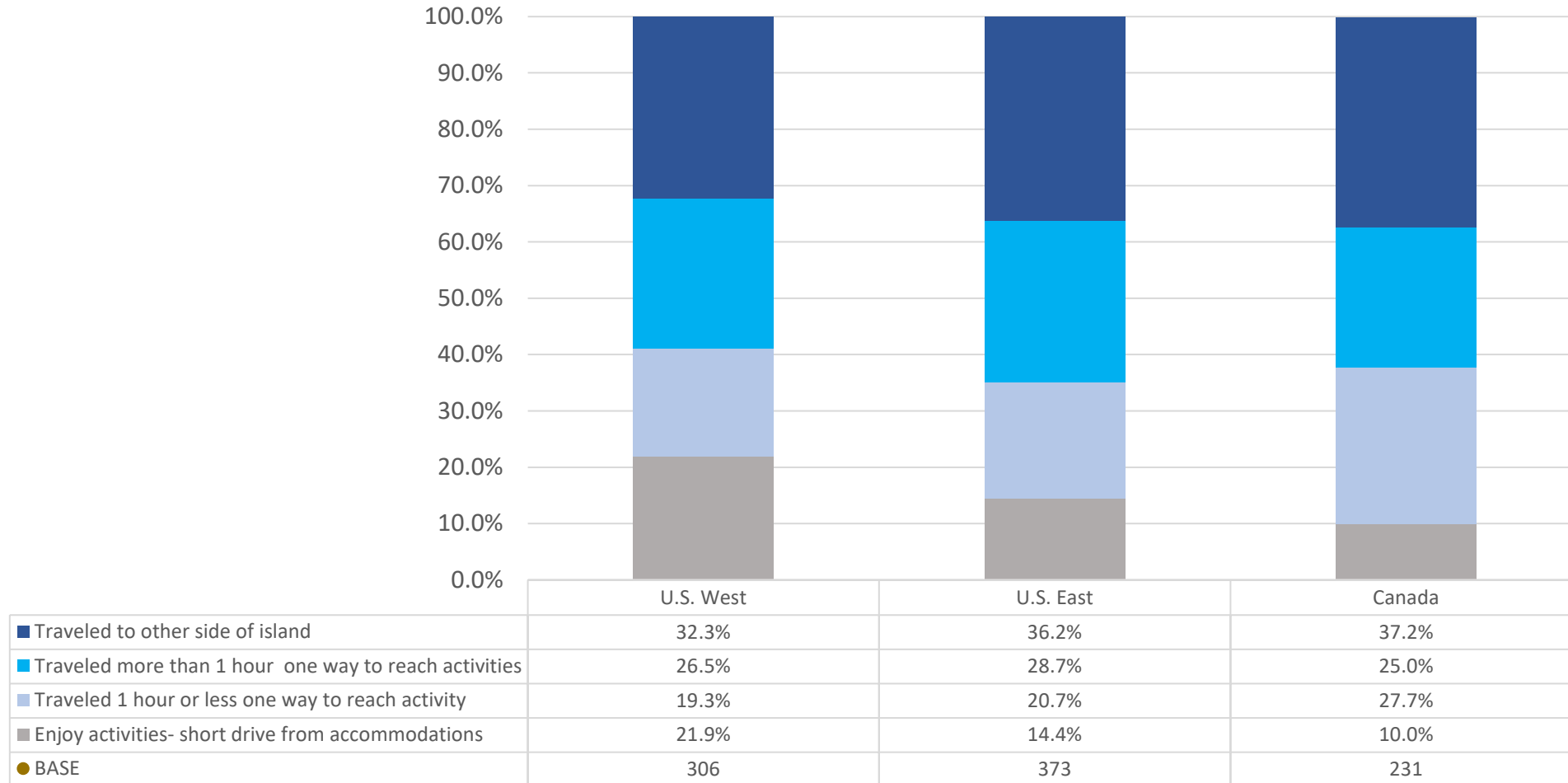
	U.S. West	U.S. East	Canada
'Akaka Falls	34.3%	34.9%	32.7%
Botanical Gardens	21.2%	17.2%	20.7%
H.N. Greenwell Store	2.0%	3.9%	3.5%
Hawai'i Volcanoes National Park	59.4%	73.9%	57.9%
Hilo Farmers Market	31.4%	26.0%	27.7%
Hulihe'e Palace	3.3%	4.1%	2.2%
'Imiloa Astronomy Ctr	2.6%	2.4%	2.1%
Kaloko Honokohau National Historical Park	10.1%	11.0%	8.3%
Kona Coffee Living History Farm	15.0%	16.2%	13.0%
Lili'uokalani Park and Garden	10.5%	10.5%	7.8%



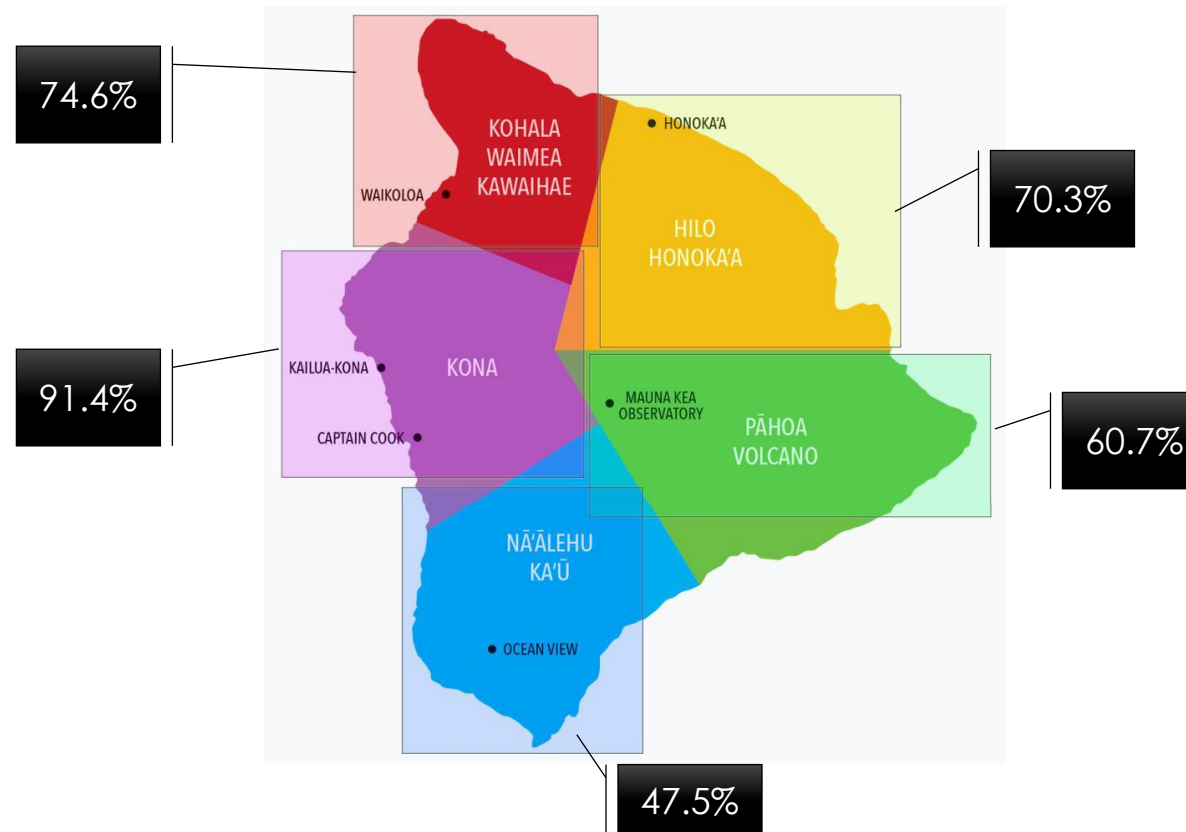
# ATTRACTIONS- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
Lyman House Memorial Museum	0.7%	2.4%	0.4%
Maunakea Visitor Ctr/ Summit	14.1%	19.0%	20.7%
Orchid Farm	1.6%	2.1%	3.9%
Pacific Tsunami Museum	3.9%	3.3%	2.2%
Pana'ewa Rainforest Zoo & Garden	5.6%	2.6%	3.4%
Pu'uhonua o Honaunau National Historical Park	23.9%	24.4%	24.9%
Pu'ukohola Heia National Historical Site	11.1%	12.3%	8.6%
Punalu'u Black Sand Beach	36.9%	43.5%	38.9%
Rainbow Falls	29.7%	35.1%	28.8%
Volcano Art Center	9.1%	10.6%	9.7%

# TRAVEL ON ISLAND OF HAWAI'I

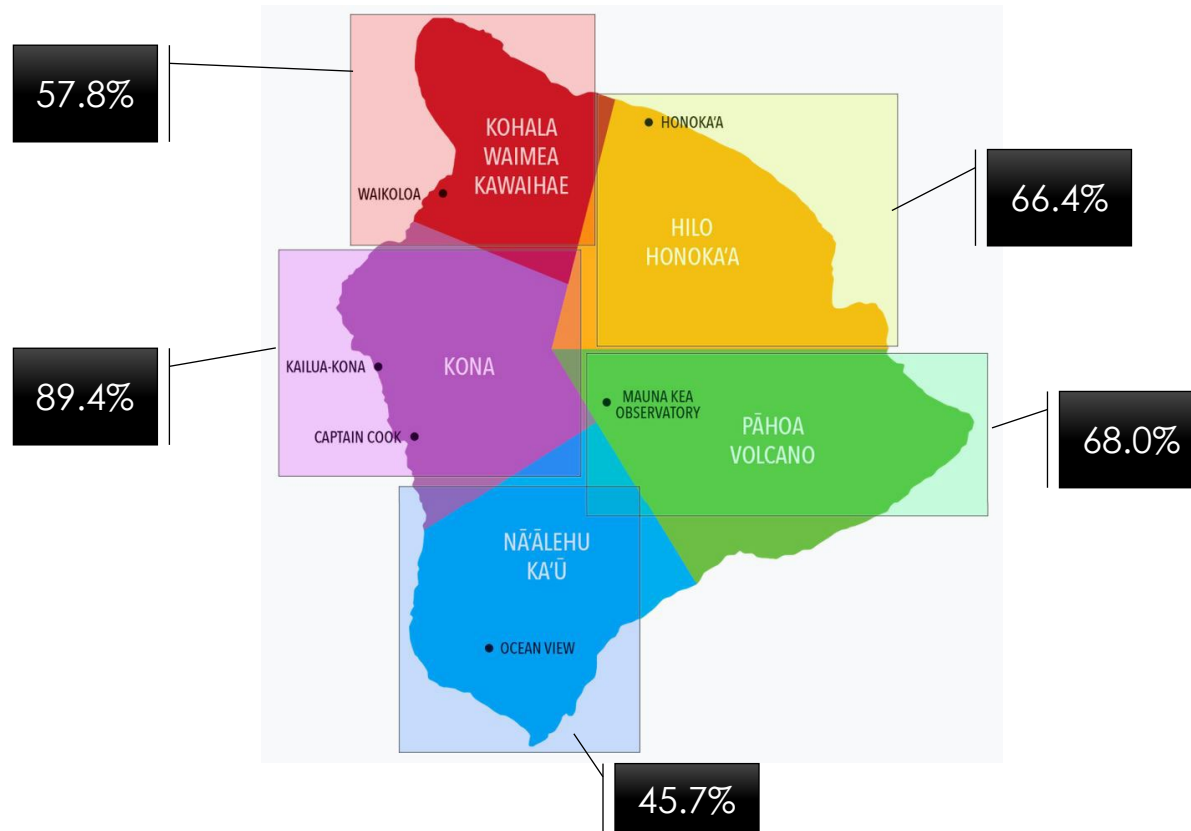


# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST

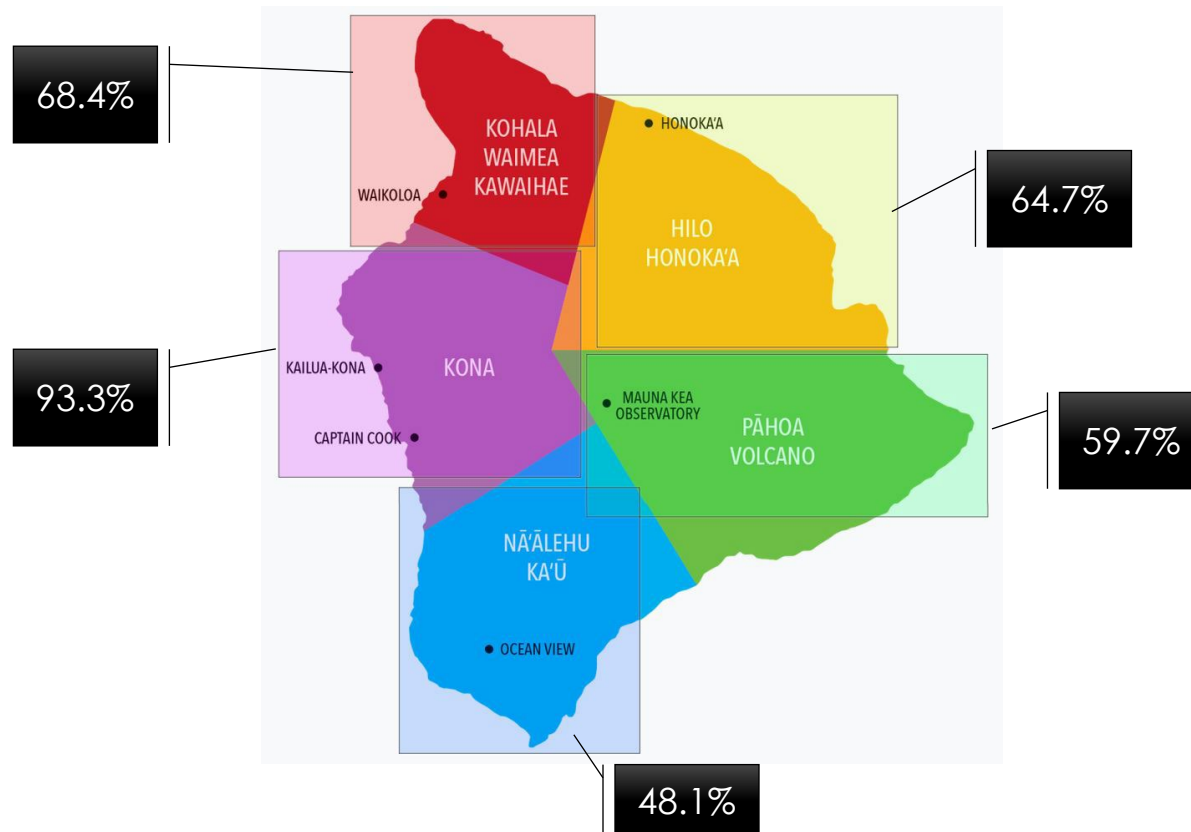


123 Q. Which of the following areas did you visit during your stay on Hawai'i Island?

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

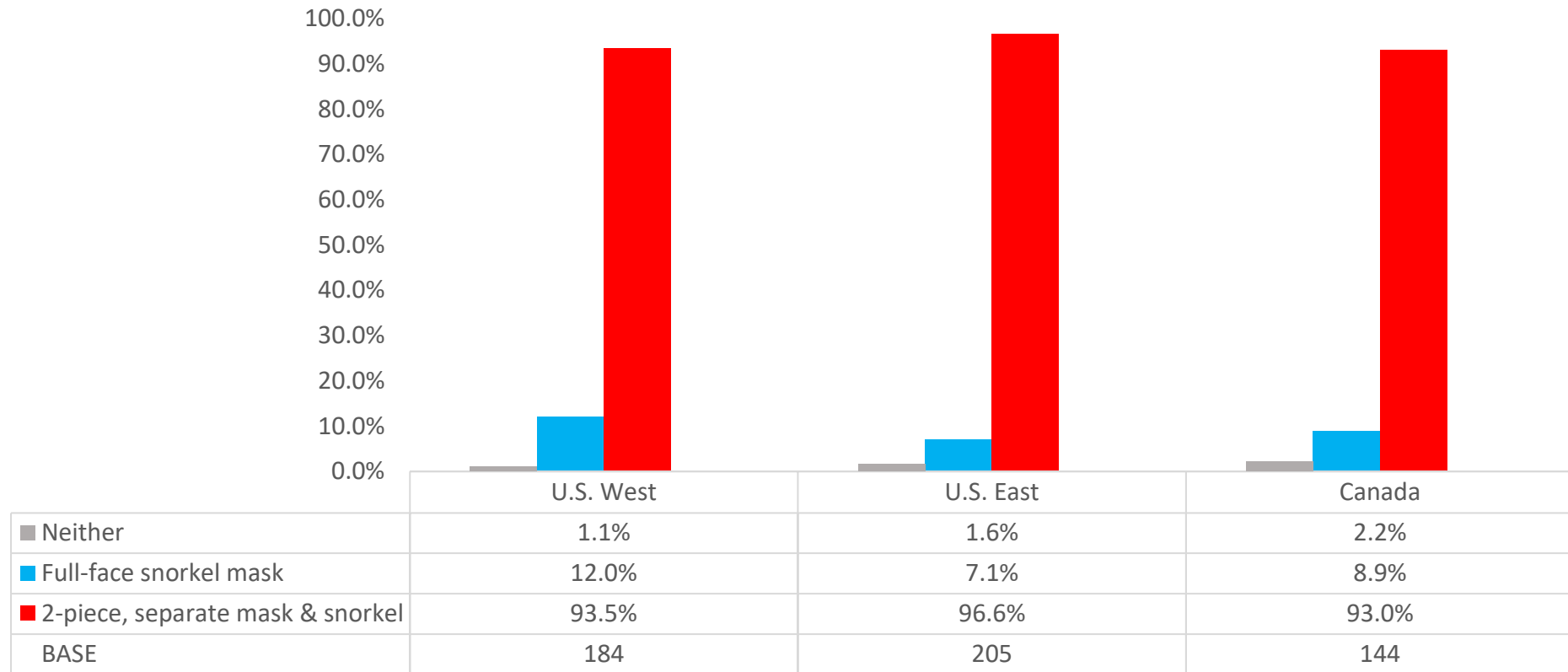


# AREAS VISITED ISLAND OF HAWAI'I CANADA



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

# SNORKELING EQUIPMENT USED ISLAND OF HAWAI'I



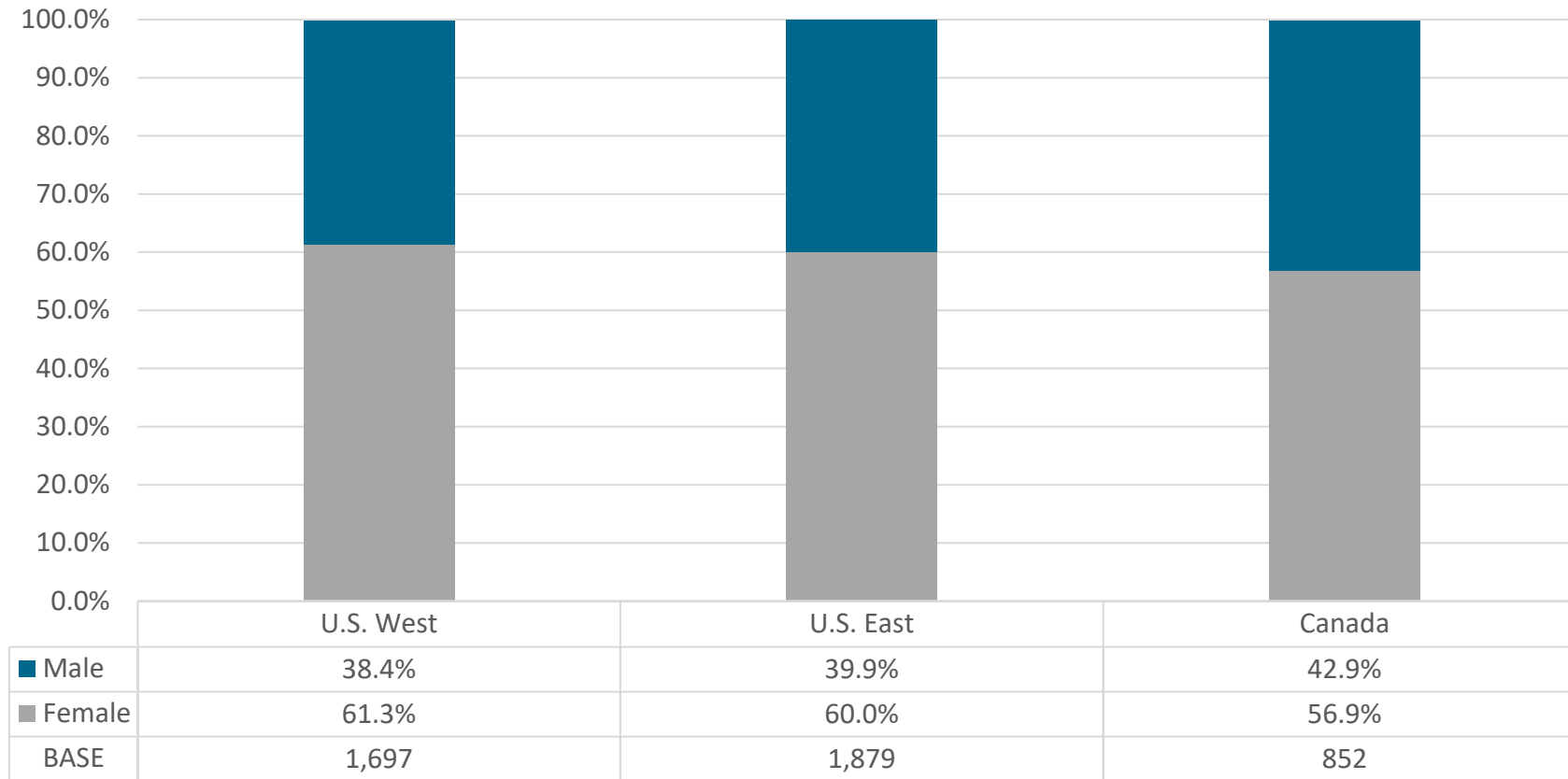
# SNORKELING OCEAN SAFETY- ISLAND OF HAWAI'I

	U.S. West	U.S. East	Canada
Did not have to be assisted or rescued	99.4%	97.2%	97.9%
Yes, needed assistance using 2 piece mask & snorkel	0.6%	2.8%	1.5%
Yes, while doing another type of ocean activity	0%	0%	0.6%
BASE	182	202	141

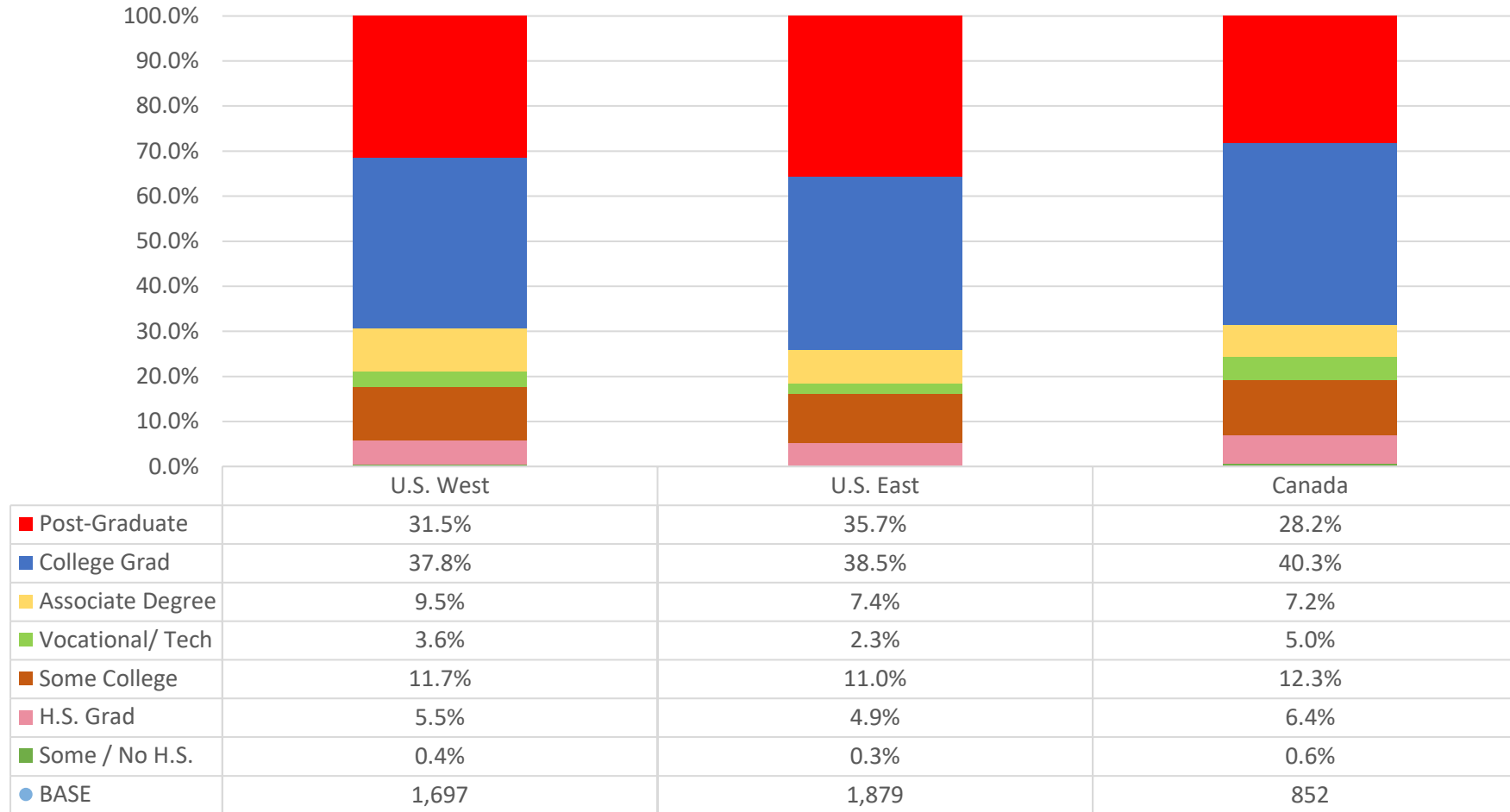
# Section 9 – VISITOR PROFILE



# VISITOR PROFILE - GENDER



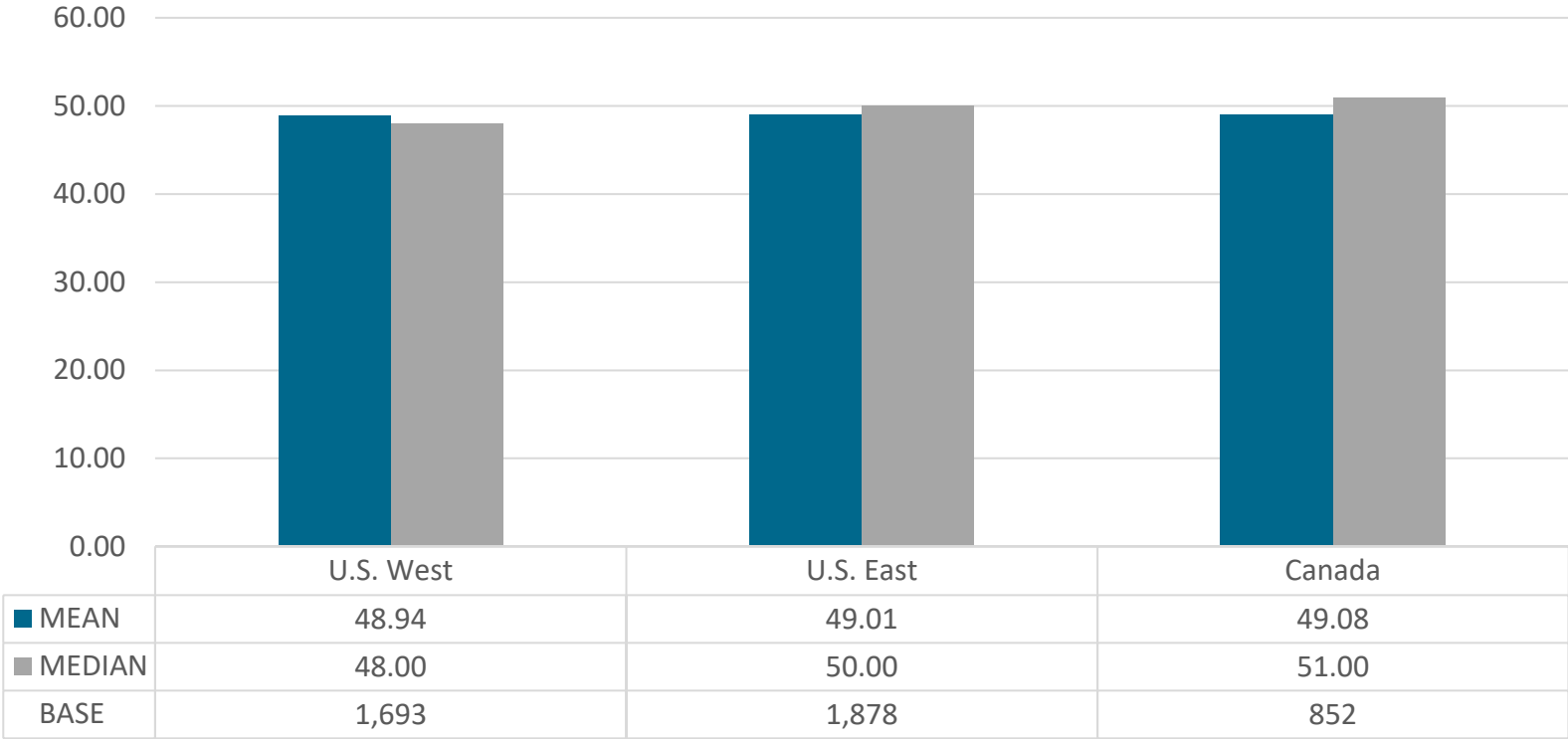
# VISITOR PROFILE - EDUCATION



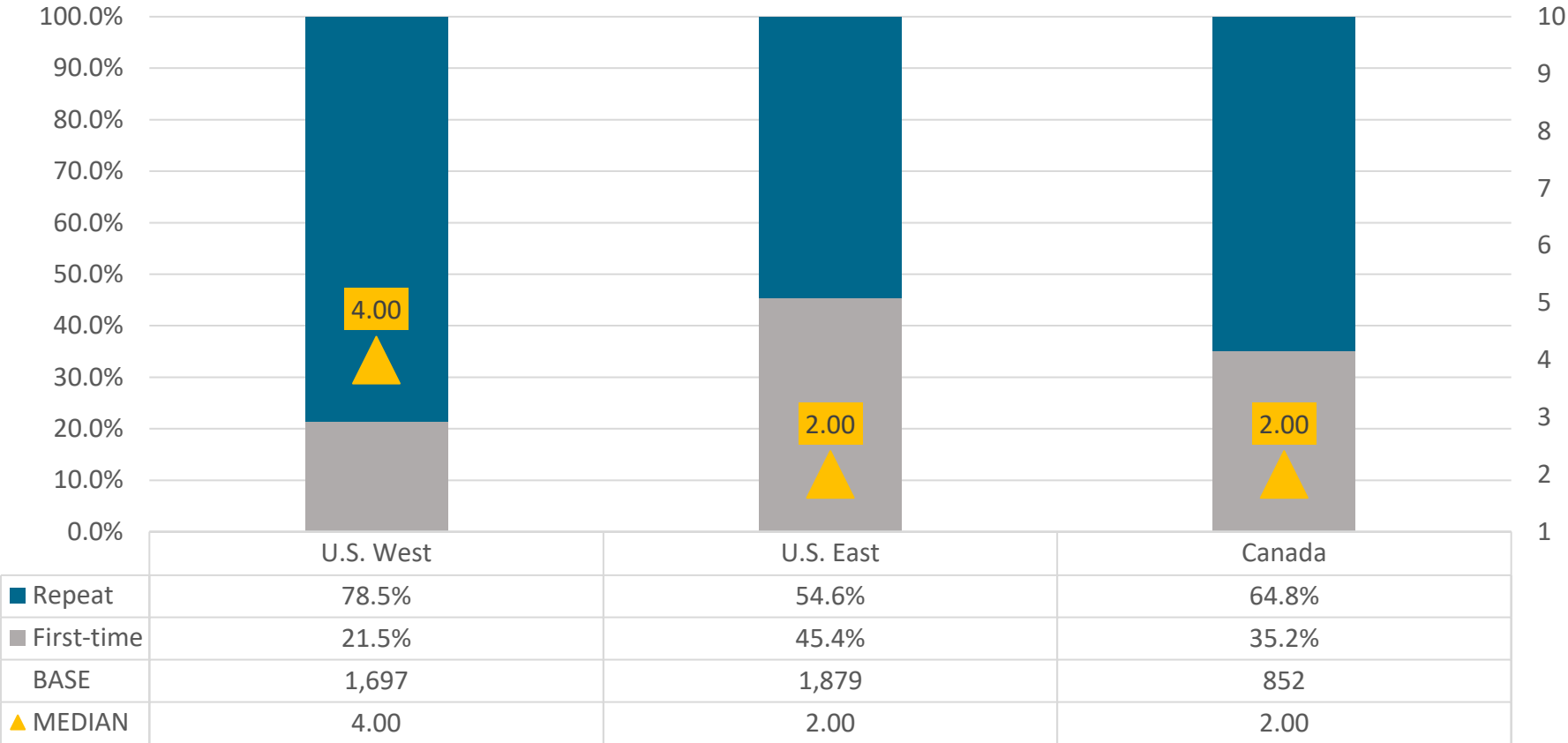
# VISITOR PROFILE - HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada
< \$40,000	4.5%	5.1%	4.7%
\$40,000 to \$59,999	5.0%	5.9%	5.4%
\$60,000 to \$79,999	7.9%	7.4%	9.6%
\$80,000 to \$99,999	8.8%	9.9%	9.7%
\$100,000 to \$124,999	13.0%	13.6%	11.3%
\$125,000 to \$149,999	11.6%	10.9%	12.0%
\$150,000 to \$174,999	9.8%	11.1%	10.8%
\$175,000 to \$199,999	7.5%	6.6%	8.2%
\$200,000 to \$249,999	10.9%	10.1%	10.2%
\$250,000 +	20.9%	19.3%	18.0%

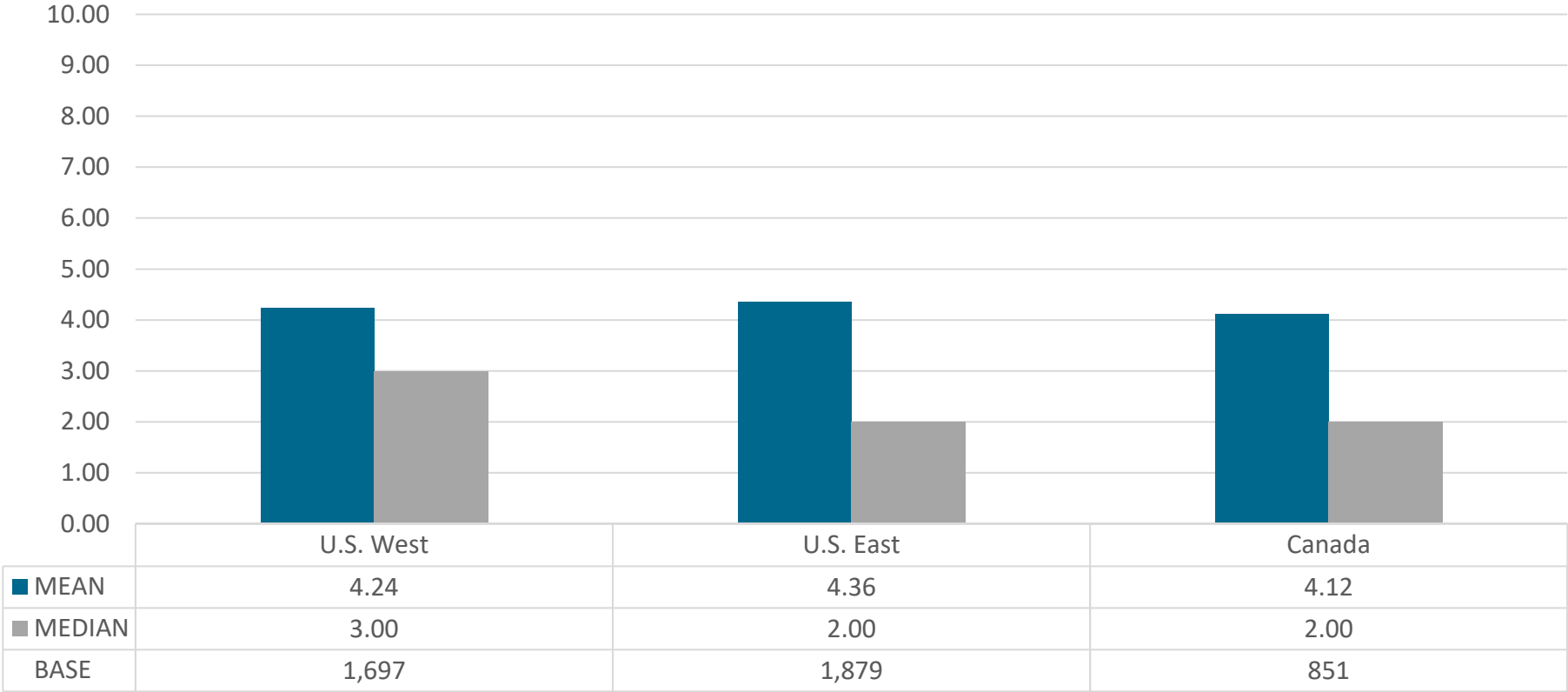
# VISITOR PROFILE - AGE



# VISITOR PROFILE - TRIPS TO HAWAI'I



# VISITOR PROFILE - TRAVEL PARTY SIZE



# VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Canada
<b>Spouse</b>	61.7%	61.5%	59.9%
<b>Child &lt;18</b>	35.4%	26.6%	18.5%
<b>Other adult family</b>	30.4%	31.4%	28.0%
<b>Friend/ Associate</b>	15.1%	14.2%	19.3%
<b>Girlfriend/ boyfriend</b>	7.6%	6.9%	9.0%
<b>Alone</b>	6.4%	8.7%	7.0%
<b>Same sex partner</b>	1.3%	1.2%	0.9%

# 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 ±</b>
<b>U.S. West</b>	682	3.75%
<b>U.S. East</b>	1,040	3.04%
<b>Canada</b>	355	5.20%
<b>All MMAs</b>	2,077	2.15%

# METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

MMA	Completed	Margin of Error ±
U.S. West	261	6.07%
U.S. East	310	5.57%
Canada	149	8.03%
All MMAs	720	3.65%

# METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MAUI

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

MMA	Completed	Margin of Error ±
U.S. West	580	4.07%
U.S. East	708	3.68%
Canada	280	5.86%
All MMAs	1,568	2.47%

# METHODOLOGY & SAMPLE SIZE - ISLAND VSAT ISLAND OF HAWAI'I

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

MMA	Completed	Margin of Error ±
U.S. West	308	5.58%
U.S. East	433	4.71%
Canada	250	6.20%
All MMAs	991	3.11%