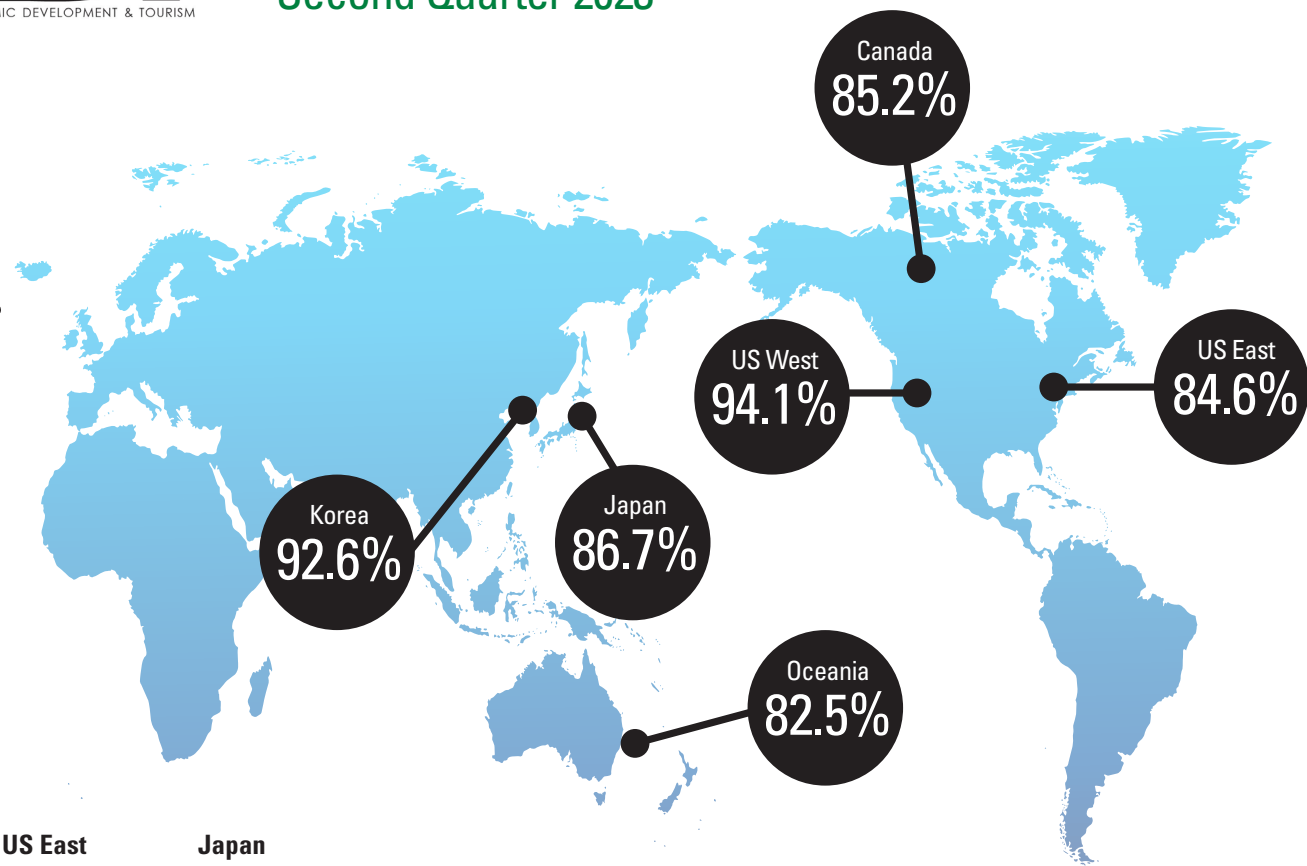


Visitor Satisfaction Survey

Second Quarter 2023

VISITORS WHO
SAY THEY ARE
“**LIKELY TO
RETURN**”
TO HAWAI’I IN THE
NEXT 5 YEARS



Visitor Profile by MMA

	US West	US East	Japan
Average Age	51	51	47
Affluent Households	31.4% \$200K+	27.4% \$200K+	22.6% ¥15M+
Education	35.1% College Grad	36.5% College Grad	53.7% College Grad

	Canada	Oceania	Korea
Average Age	50	54	37
Affluent Households	22.6% \$200K+	24.3% \$200K+	12.3% ₩150M+
Education	37.2% College Grad	21.2% College Grad	58.9% College Grad

COVID-19 Travel Restrictions

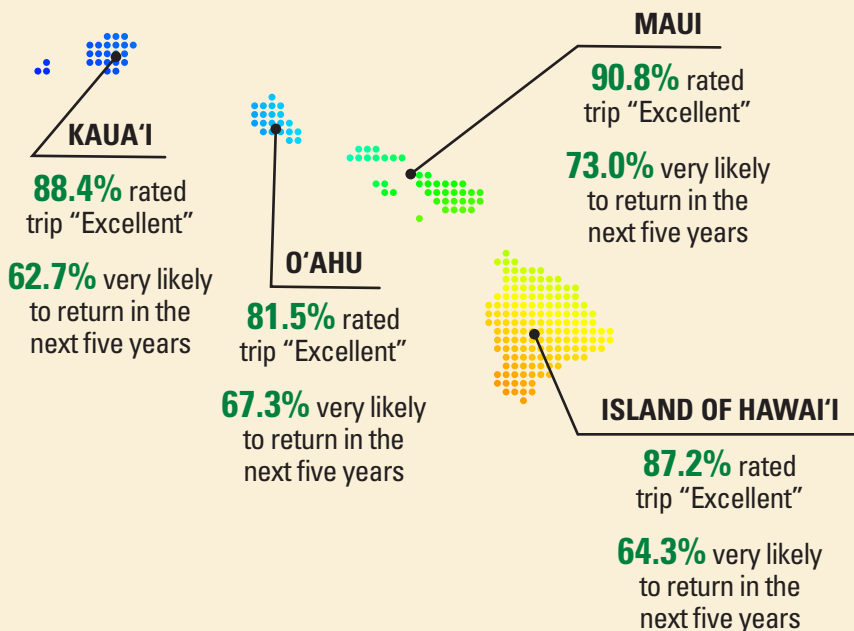
At the time of the Quarter 2, 2023 VSAT Survey, there were no travel requirements for visitors who arrived to Hawai’i on domestic flights. In accordance with U.S. international arrival rules, travelers from foreign countries were no longer required to have a negative pre-travel test, regardless of vaccination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

- U.S. West 1,684 completed surveys, +/- 2.39% margin of error*
- U.S. East 1,799 completed surveys, +/- 2.31% margin of error*
- Canada 884 completed surveys, +/- 3.30% margin of error*
- Japan 140 completed surveys, +/- 8.28% margin of error*
- Korea 529 completed surveys, +/- 4.26% margin of error*
- Oceania 414 completed surveys, +/- 4.82% margin of error*

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



MARKET AREA SNAPSHOT: U.S. WEST



TOP ATTRACTION BY ISLAND

