

VISITOR SATISFACTION STUDY QUARTER 3, 2023

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

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Survey Methodology

The Visitor Satisfaction and Activity Survey (VSAT) is a survey of visitors from eight visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 3, 2023 report included survey results from: U.S. West (Alaska, California, Oregon, Washington, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming), U.S. East (all other states in the Continental U.S.), Japan, Canada, Oceania, Korea. Samples collected for China were too limited to report.

Visitor market	Completed	Margin of Error \pm	Response Rate
U.S. West	1,573	2.47	16.64
U.S. East	1,639	2.42	17.75
Japan	259	6.09	19.65
Canada	897	3.27	19.98
Oceania	496	4.40	16.50
Korea	305	5.61	43.77
China	41	15.31	5.65
All visitor markets	5,210	1.36	18.00

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-flight and International Departure Intercept surveys. Selected U.S. visitors were sent an email invitation with a link to complete the survey online. Intercept surveys were also conducted by trained interviewers with departing visitors from Korea and Japan at the Daniel K. Inouye International Airport in Honolulu.

Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 3, 2023. 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

Since March 26, 2022, there has been no COVID-related travel requirements for visitors who arrived to Hawai'i on domestic flights. As of May 12, 2023, travelers who came via direct international flights were no longer required to show proof of being fully vaccinated before boarding their flight. 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.

Special Section – Maui Wildfire

Effect of Maui Wildfire

On August 8, 2023, a devastating wildfire took place in Lahaina on West Maui, destroying nearly all residential properties, cultural and historical sites, and commercial businesses in the area. DBEDT requested a special analysis to understand the impact this event had on visitors to Maui.

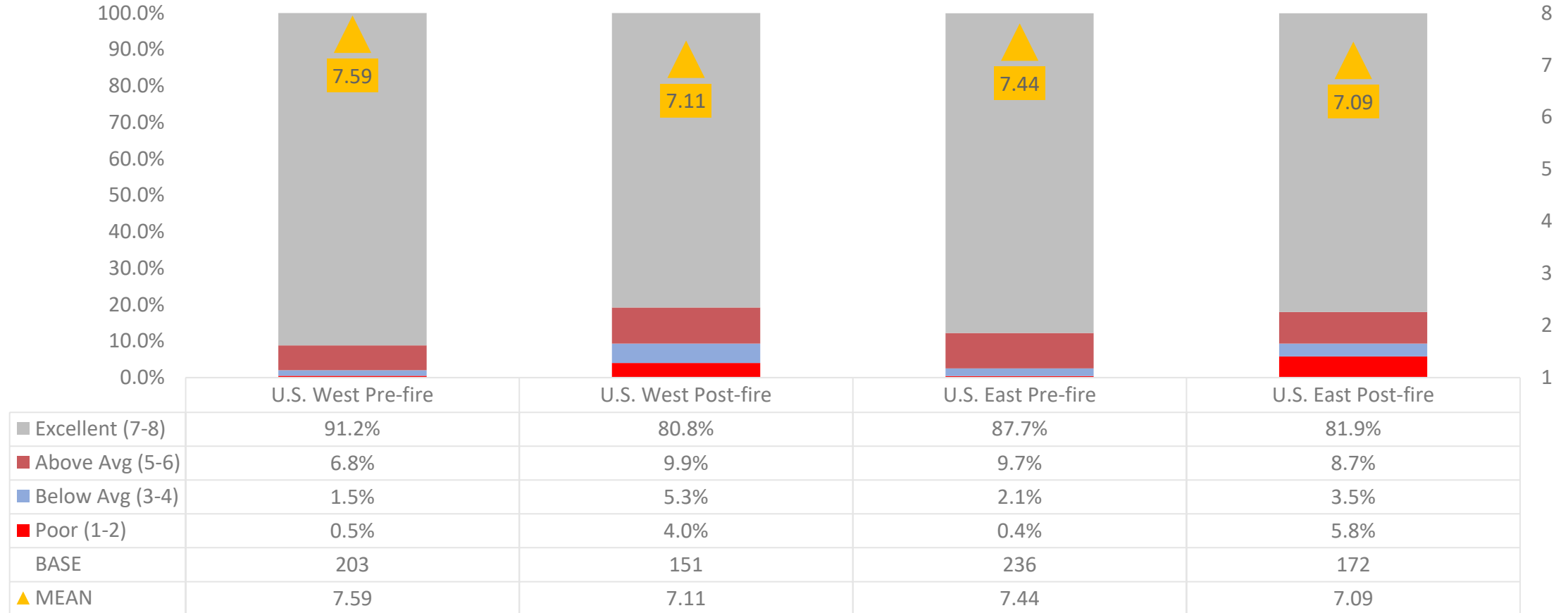
In order to compare and contrast visitor perceptions, the data were segmented into pre-fire and post-fire respondents. When segmenting the data pre/post fire by arrival date, August 5 was used as the cutoff with the logic that those who arrived a few days before the fire occurred had a high probability of still being on island at the time of the disaster.

This special section focuses on results for U.S. West and U.S. East, as those markets had the most robust sample sizes of visitors to Maui during this period. Sample sizes during this period of visitors from other markets are too limited for analysis.

VISITOR SATISFACTION - MAUI TRIP

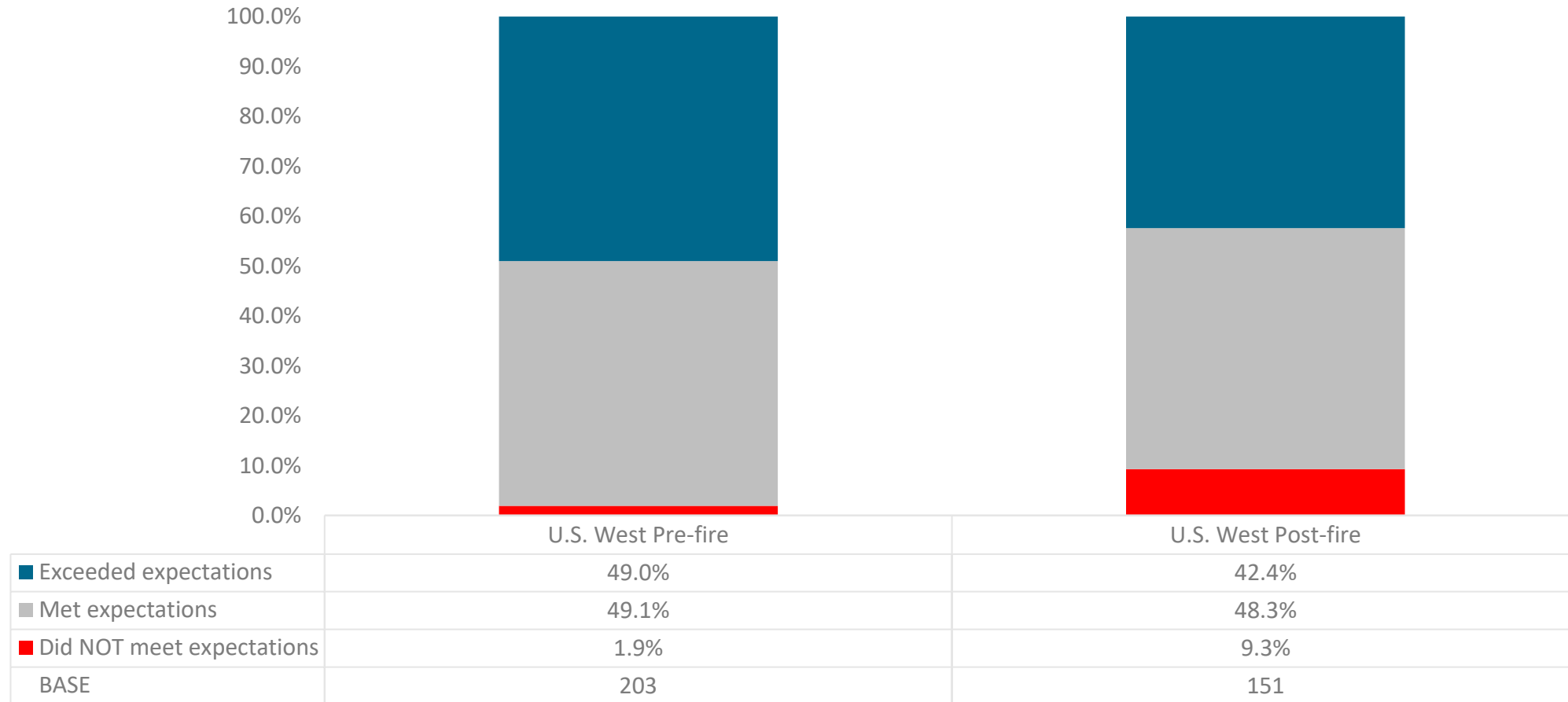
Statistically lower levels of satisfaction among U.S. West & U.S. East visitors to Maui who traveled to the island after the fires took place.

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



SATISFACTION - HAWAI'I TRIP EXPECTATIONS

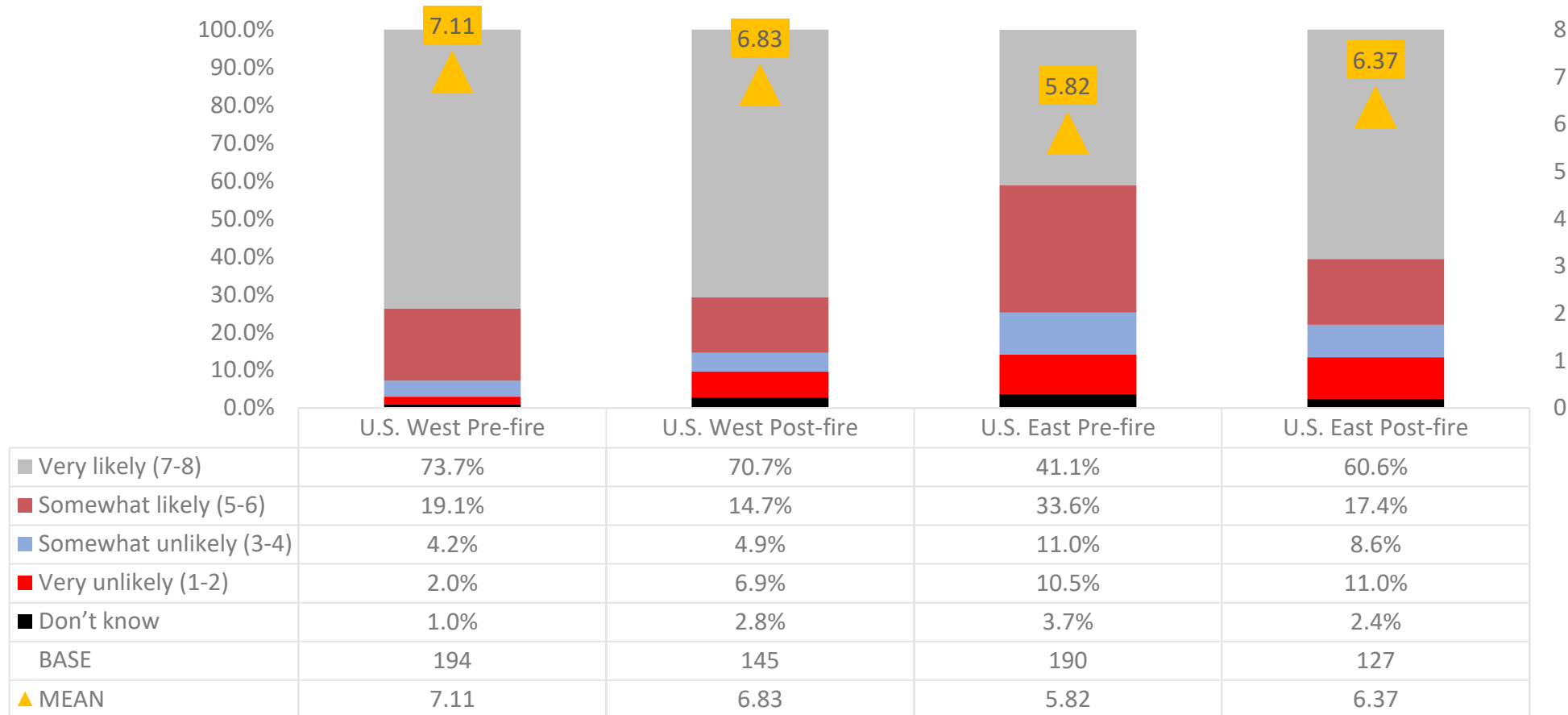
Nearly 1 in 10 Maui visitors from U.S. West who visited the island after the fires took place admit their trip did not meet their expectations, which is statistically higher when compared to pre-fire visitors from this market.



LIKELIHOOD OF RETURN VISIT - MAUI

No statistically significant differences between pre- and post-fire travelers from U.S. West & U.S. East when asked about their likelihood of return Maui.

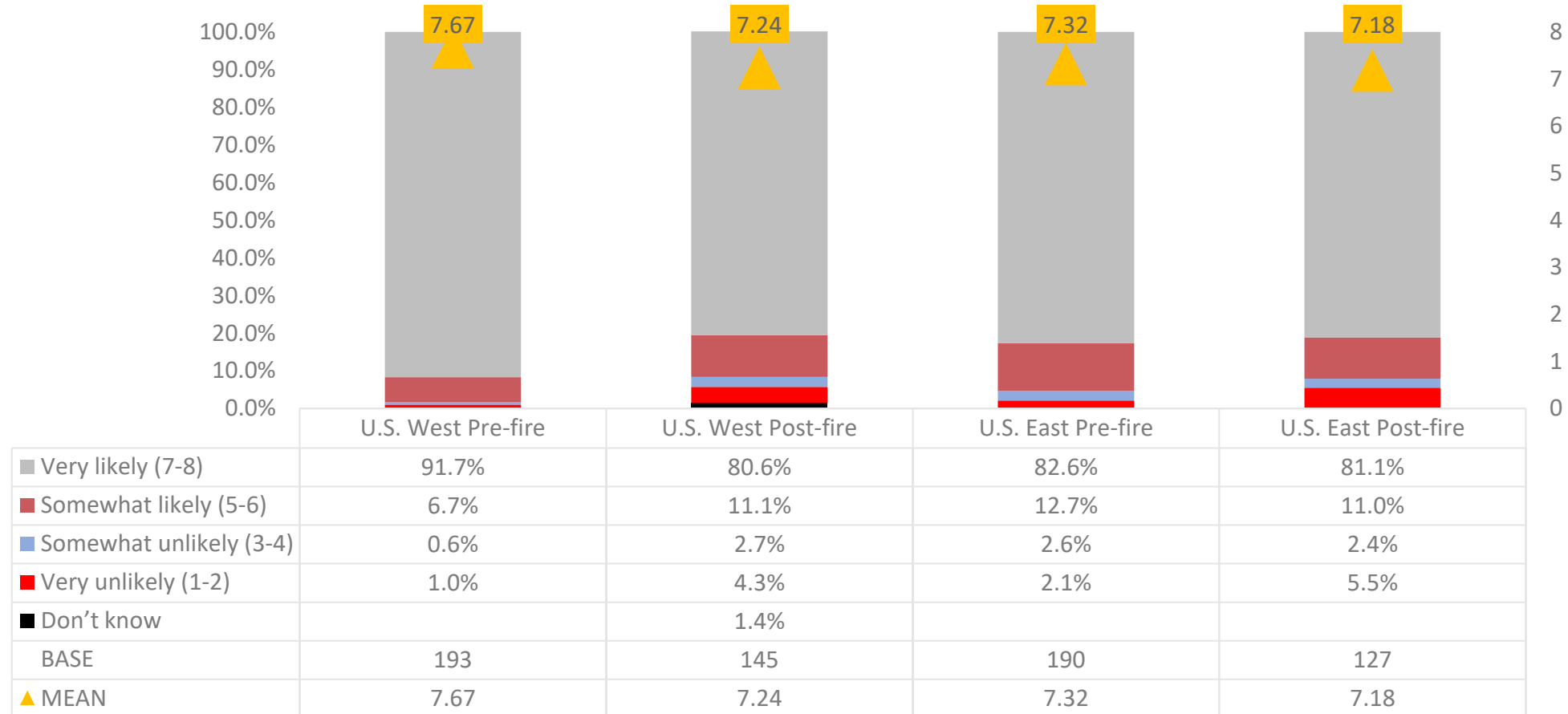
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



DESINTATION ADVOCACY- MAUI

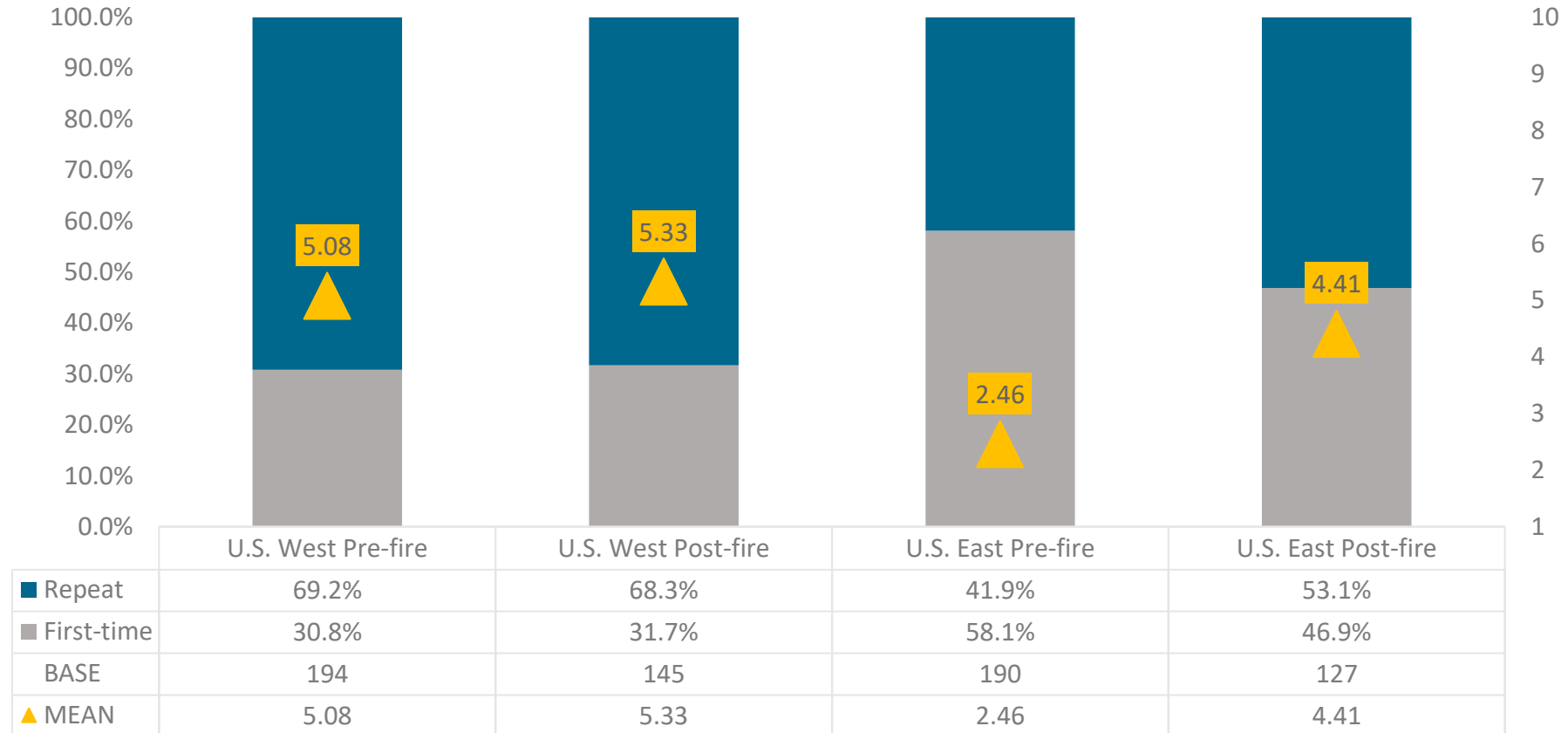
Post-fire visitors from the U.S. West are statistically less likely to recommend Maui as a travel destination compared to pre-fire visitors from this market.

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



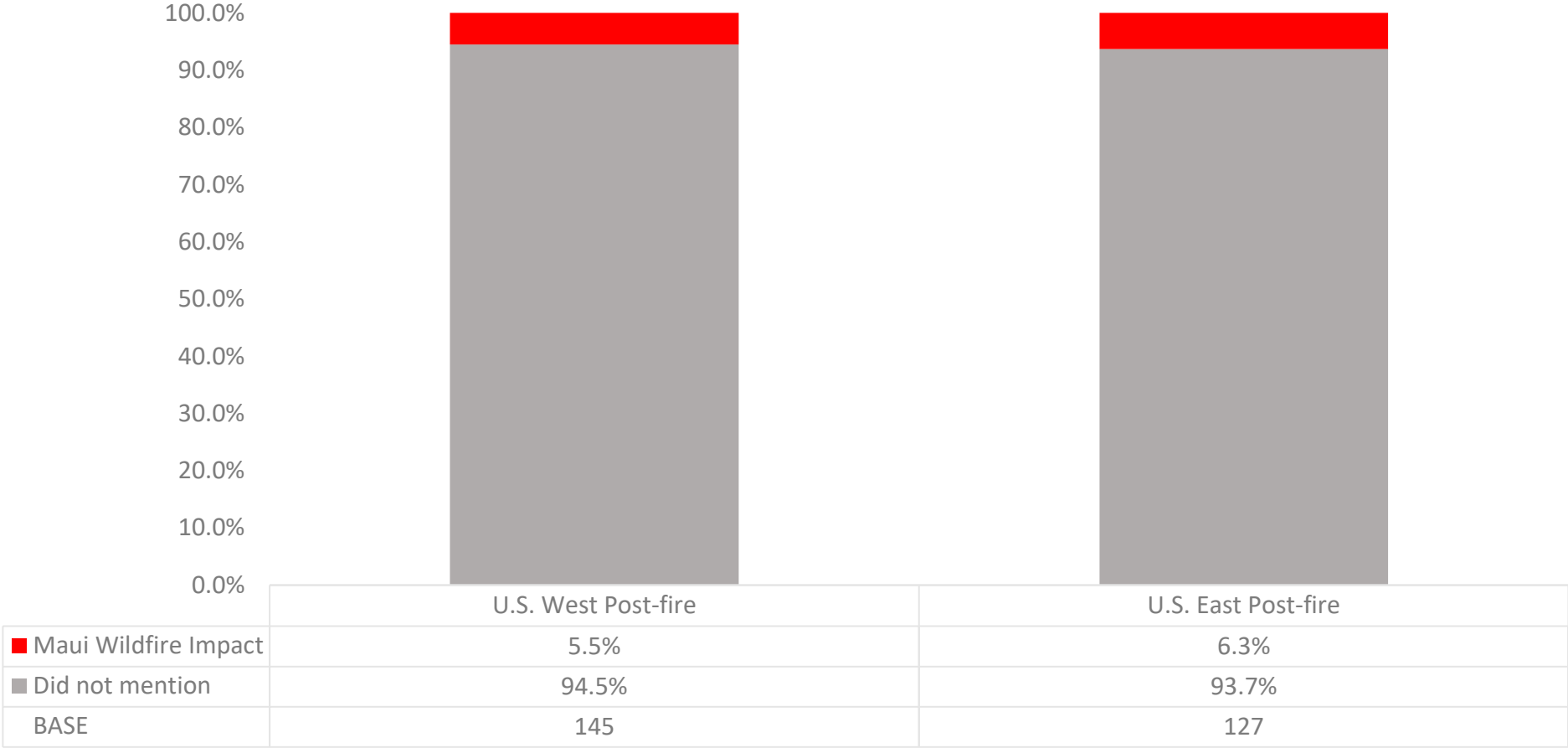
VISITOR PROFILE - TRIPS TO MAUI

Post-fire visitors to Maui from U.S. East are more frequent or regular travelers to Maui compared to pre-fire visitors from this market.



MAUI TRIP - FIRE'S IMPACT ON TRIP - UNAIDED

Very few, if any, post-fire visitors specifically mentioned the impact of the fire as something that would have improved their stay on Maui.



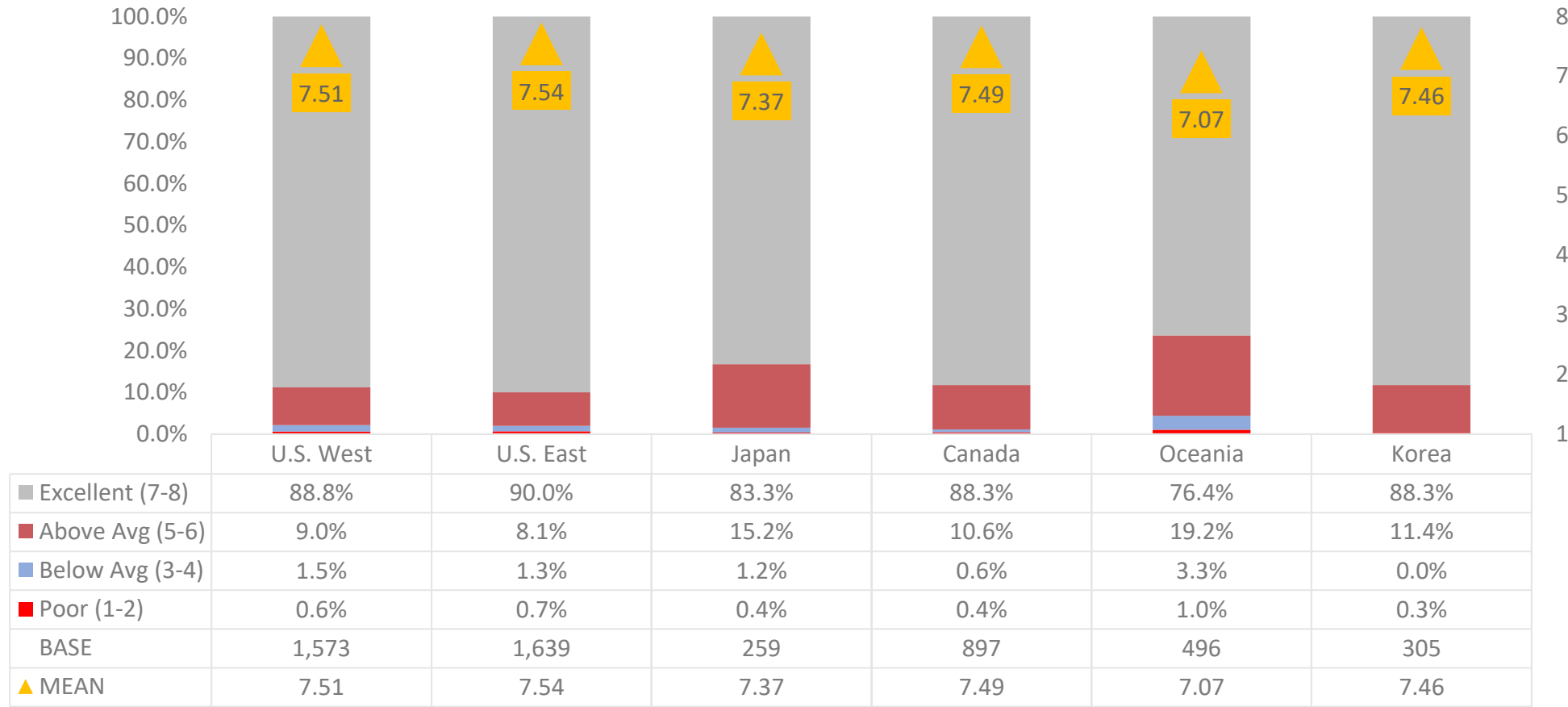
OTHER KEY HIGHLIGHTS

- ***Caring for and respecting Hawai'i's culture, people, and environment:*** Aided awareness is statistically higher post-fire among visitors from **U.S. West**.
- ***Lodging / Accommodations:*** Statistically lower satisfaction scores post-fire among visitors from **U.S. West**.
- ***Dining / Food & Beverage:*** Statistically lower satisfaction scores post-fire among visitors from **U.S. West**.
- ***Entertainment & Attractions:*** Statistically lower satisfaction scores post-fire among visitors from **U.S. West**.
- ***Retirees:*** There were statistically higher proportions of retirees that comprise post-fire visitors to Maui from both **U.S. West** and **U.S. East**.
- ***Age:*** The average age of travelers to Maui from **U.S. West** is statistically higher post-fire.
- ***Household income:*** The profile of post-fire visitors from **U.S. East** show a less affluent (fewer travelers residing in homes earning more than \$250K) traveler compared to pre-fire visitors.
- ***Education:*** When comparing travelers from **U.S. East** pre- versus post-fire, we find fewer visitors with post-graduate degrees after the fire.

Section 1 – Visitor Satisfaction

Satisfaction - State of Hawai'i by Visitor Market

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



Satisfaction – State of Hawai‘i by Visitor Market

- **Gender:** Female respondents from **U.S. West** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Household Income:** Travelers from **U.S. West** who reside in homes in the bottom income tier (<\$100K) gave higher satisfaction scores than more affluent (\$100K+) travelers from this visitor market.
- **Age:** Younger travelers (18-34) from **Japan** gave statistically higher satisfaction scores compared to older visitors (35-64) from this visitor market.
- **Travel party size:** Visitors from **Japan** who were visiting the state by themselves gave statistically lower satisfaction scores compared to those visitors from this market who were traveling with others.

Satisfaction - State of Hawai'i by Visitor Market

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

100.0%

80.0%

60.0%

40.0%

20.0%

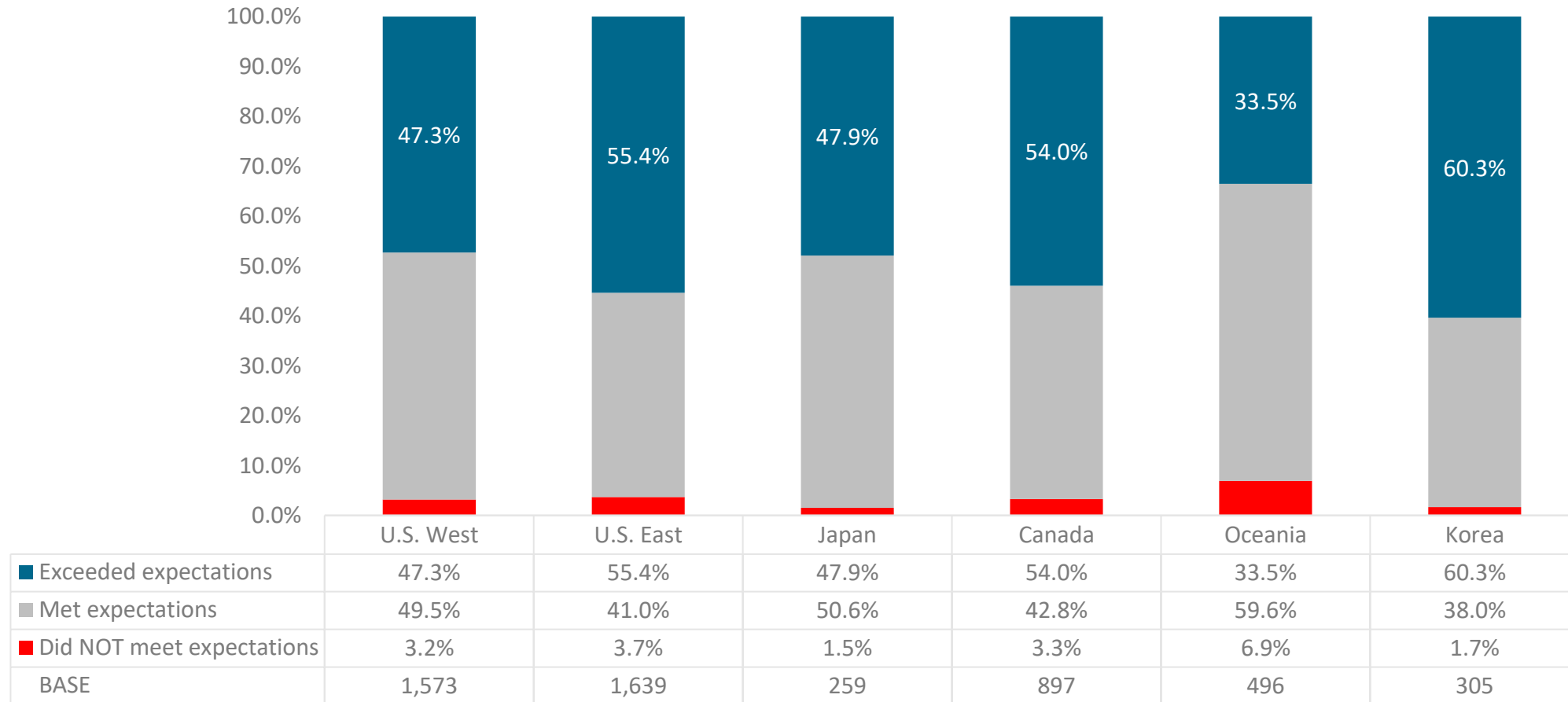
0.0%

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	87.5%	89.7%	88.8%	89.2%	54.5%	86.0%	88.7%	88.8%
U.S. East	90.0%	92.2%	90.0%	90.5%	57.9%	84.9%	89.4%	90.0%
Japan	78.3%	80.6%	85.6%	89.2%			79.9%	83.3%
Canada	88.4%	91.0%	87.3%	89.7%			87.8%	88.3%
Oceania	81.5%	82.9%	80.8%	81.5%			80.5%	76.4%
Korea	72.9%	72.9%	73.3%	76.1%			84.7%	88.3%

Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

P= Preliminary Data

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

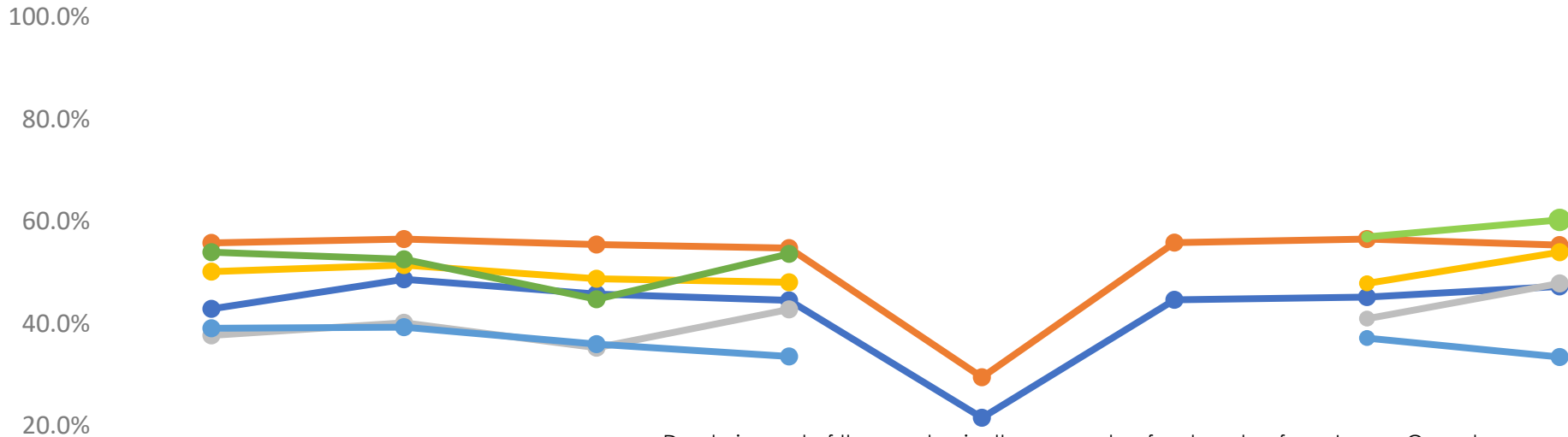


SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher mean scores than repeat visitors: **U.S. West, U.S. East, Oceania, and Japan.**
- ***Age:*** Younger respondents (between 18 – 34 years old) from **U.S. West, U.S. East, Japan, and Canada** were more likely to respond that their trip exceeded expectations compared to visitors from these markets in other age groups. Agreement with this sentiment tended to decline with age.
- ***Gender:*** Female visitors from **U.S. West** and **U.S. East** gave higher mean satisfaction scores compared to male visitors from these markets.
- ***Travel party size:*** Visitors from **U.S. West** who traveled in larger travel parties (3+ persons) gave higher satisfaction scores compared to those who traveled by themselves.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



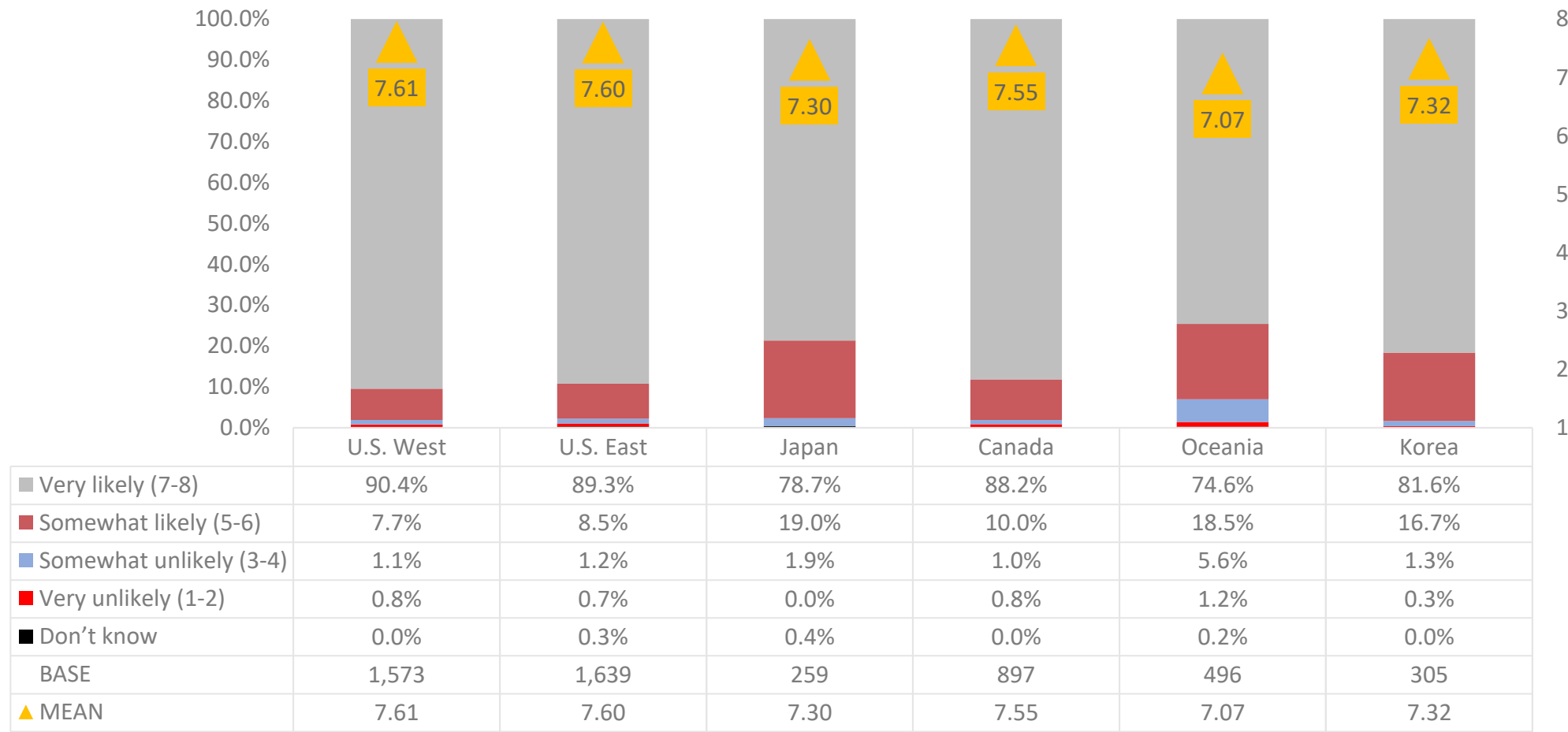
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	42.9%	48.7%	45.8%	44.6%	21.6%	44.7%	45.2%	47.3%
U.S. East	55.8%	56.6%	55.5%	54.8%	29.5%	55.9%	56.6%	55.4%
Japan	37.7%	40.2%	35.3%	42.8%			41.0%	47.9%
Canada	50.2%	51.5%	48.8%	48.1%			47.9%	54.0%
Oceania	39.1%	39.3%	36.0%	33.6%			37.2%	33.5%
Korea	54.0%	52.6%	44.8%	53.7%			57.0%	60.3%

P= Preliminary Data

BRAND/ DESTINATION - ADVOCACY

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

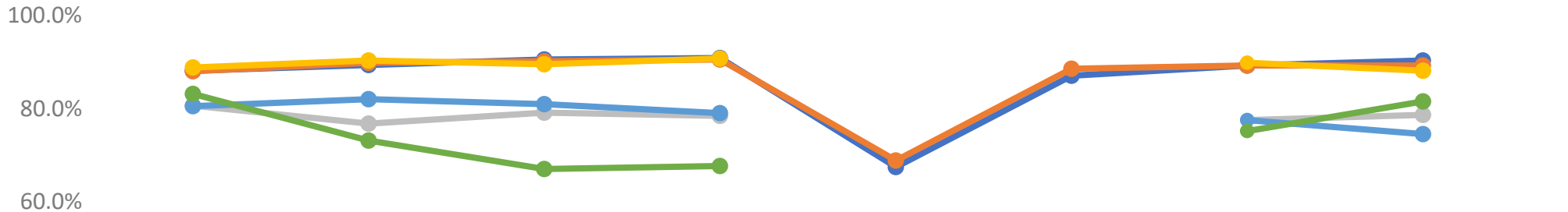


BRAND/ DESTINATION – ADVOCACY

- **Gender:** Females from **U.S. West** and **U.S. East** were more likely to recommend the state to others than males from these visitor markets.
- **Household income:** Visitors from **U.S. West** who reside in the bottom income tier (<\$100K) were less likely to recommend the state compared to more affluent visitors (\$150K+).
- **Trips to Hawai'i:** Repeat visitors from **U.S. West** and **U.S. East** were more likely to recommend the state than first-time visitors from these markets.
- **Education:** College graduates from **U.S. West** were more likely to recommend the state compared to those without a college degree.

BRAND/ DESTINATION - ADVOCACY

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



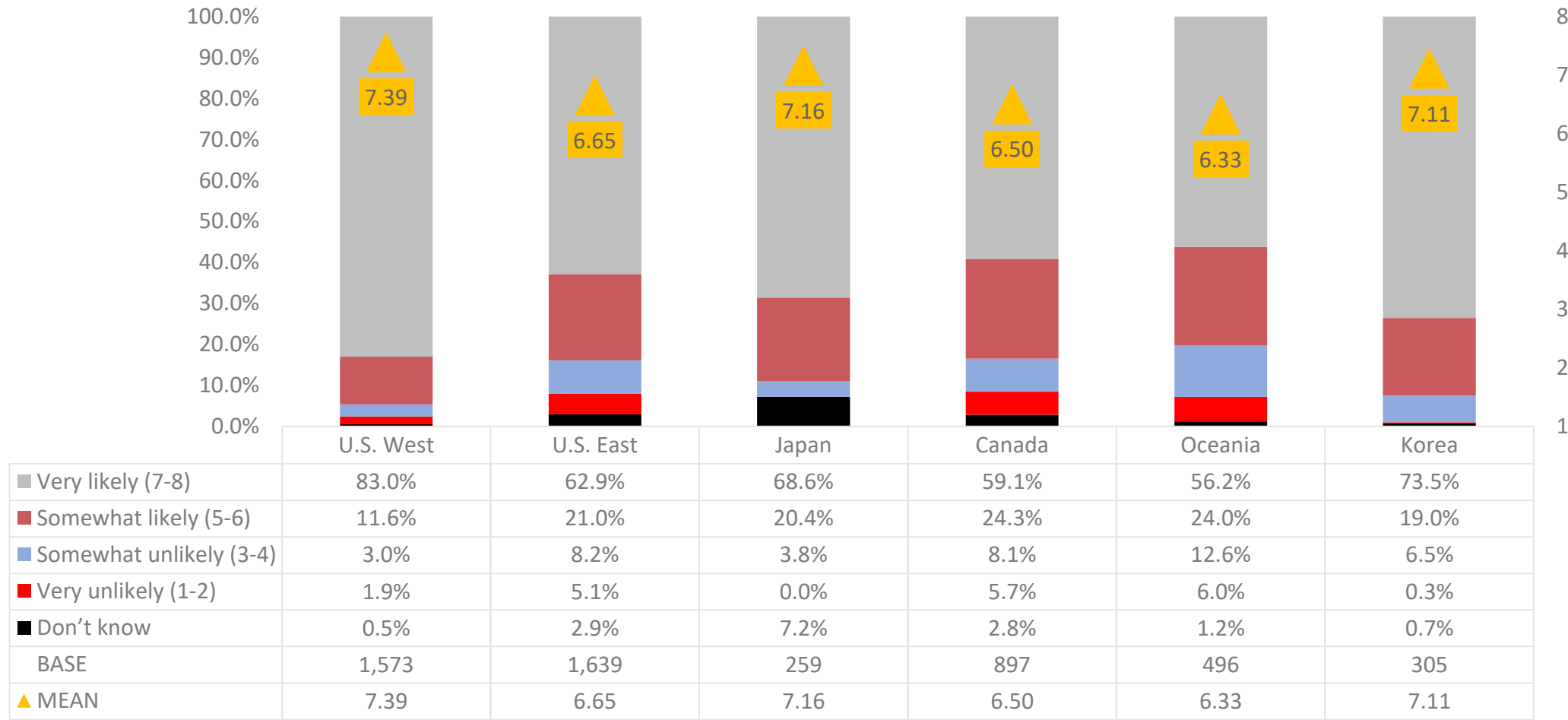
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	88.2%	89.4%	90.6%	90.9%	67.5%	87.1%	89.3%	90.4%
U.S. East	88.1%	89.9%	90.2%	90.6%	68.9%	88.6%	89.3%	89.3%
Japan	80.7%	76.8%	79.2%	78.5%			77.6%	78.7%
Canada	88.9%	90.4%	89.6%	90.8%			89.9%	88.2%
Oceania	80.6%	82.1%	81.0%	79.1%			77.6%	74.6%
Korea	83.2%	73.2%	67.1%	67.7%			75.2%	81.6%

P= Preliminary Data

LIKELIHOOD OF RETURN VISIT

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

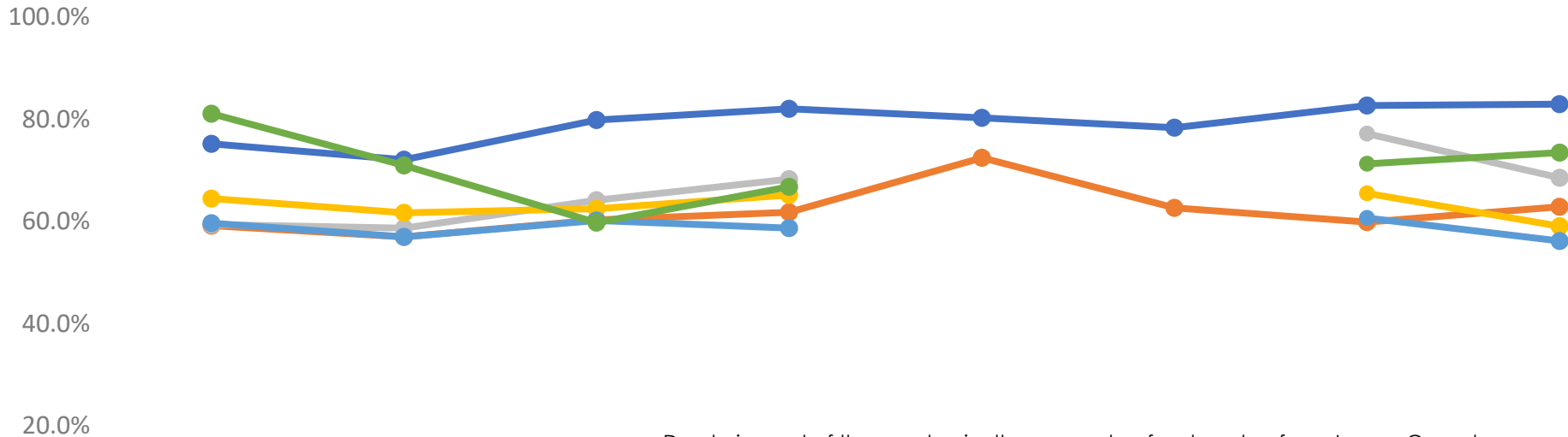


LIKELIHOOD OF RETURN VISIT

- ***Trips to Hawai'i:*** Repeat visitors from the following visitor markets expressed a greater likelihood of returning to the state than first-time visitors: **U.S. West, U.S. East, Japan, Oceania, and Canada.**
- ***Islands visited:*** Visitors from **U.S. West, U.S. East, and Canada** whose trip consisted of visiting a single island expressed a higher likelihood of returning to the state than those who visited multiple islands during their stay.
- ***Age:*** Seniors (65+) from **U.S. East** were less likely to return to the state compared to younger segments of this visitor market. Conversely, older visitors (50+) from **Japan** are more likely to revisit the state compared to younger visitors from this market.
- ***Education:*** Visitors from **U.S. West** and **U.S. East** without a college degree are more likely to return to the state than college graduates from these markets.

LIKELIHOOD OF RETURN VISIT

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



Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	75.2%	72.1%	79.9%	82.1%	80.3%	78.4%	82.7%	83.0%
U.S. East	59.2%	57.0%	60.3%	61.8%	72.5%	62.7%	59.9%	62.9%
Japan	59.4%	58.7%	64.2%	68.3%			77.2%	68.6%
Canada	64.5%	61.7%	62.5%	65.2%			65.5%	59.1%
Oceania	59.7%	57.0%	60.2%	58.7%			60.7%	56.2%
Korea	81.1%	71.0%	59.8%	66.8%			71.3%	73.5%

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. WEST

Q3 2022	Q3 2023 P
49.3% Too expensive	58.6% Too expensive
29.8% Poor value	33.1% Want to go someplace new
26.6% Want to go someplace new	31.4% Poor value
21.6% Too crowded/ congested/ traffic	27.5% Too crowded/ congested/ traffic
13.7% No reason to return/ nothing new	21.4% No compelling reason to return
12.8% Unfriendly people/ felt unwelcome	20.5% Too commercialized/ overdeveloped
11.1% Flight too long	14.6% Unfriendly people/ felt unwelcome
10.4% Five years is too soon	12.2% Poor service
10.2% Too commercialized/ overdeveloped	

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q3 2022	Q3 2023 P
54.7% Too expensive	55.4% Too expensive
40.9% Want to go someplace new	49.1% Flight too long
37.4% Flight too long	39.6% Want to go someplace new
17.4% Five years is too soon	17.4% Five years is too soon
17.4% Poor value	16.3% Poor value
16.7% Other financial obligations	13.5% Other financial obligations
15.5% Too crowded/ congested/ traffic	13.2% Too crowded/ congested/ traffic
10.1% Too commercialized/ overdeveloped	11.3% Too commercialized/ overdeveloped

P= Preliminary Data

UNLIKELY TO RETURN – TOP REASONS JAPAN

Q3 2022*	Q3 2023 P**
85.3% Too expensive 50.0% No compelling reason to return 35.3% Five years is too soon 35.3% Other financial obligations 35.3% Want to go someplace new 14.7% Poor health	58.9% Too expensive 34.5% Five years is too soon 17.3% Want to go someplace new 13.7% Other financial obligations 10.5% Poor health/ age 10.3% Flight too long

*Caution small base (n=4) in Q3 2022.

**Caution small base (n=29) in Q3 2023.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q3 2022	Q3 2023 P
58.2% Too expensive	63.6% Too expensive
44.8% Want to go someplace new	41.9% Want to go someplace new
27.8% Flight too long	33.0% Flight too long
19.6% Poor value	22.0% Five years is too soon
16.8% Five years is too soon	19.0% Poor value
12.9% Other financial obligations	16.6% Other financial obligations
11.2% No compelling reason to return	12.8% Too commercialized/ overdeveloped
10.6% Too commercialized/ overdeveloped	11.5% Too crowded/ congested/ traffic

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q2 2022	Q2 2023 P
71.1% Too expensive	66.8% Too expensive
43.3% Want to go someplace new	45.8% Poor value
35.5% Poor value	28.1% Want to go someplace new
19.2% Too commercialized/ overdeveloped	24.2% Too commercialized/ overdeveloped
17.0% Too crowded/ congested/ traffic	20.7% Too crowded/ congested/ traffic
14.0% Other financial obligations	13.9% Flight is too long
12.4% Flight too long	13.7% Five years is too soon
	13.1% No compelling reason to return

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q3 2022*	Q3 2023 P**
80.5% Too expensive	65.6% Too expensive
41.6% Poor value	34.9% Five years is too soon
39.0% No compelling reason to return	29.7% Flight too long
29.2% Flight too long	26.4% Poor value
22.1% Too commercialized/ overdeveloped	21.2% Other financial obligations
19.5% Want to go someplace new	21.2% Want to go someplace new
19.5% Too crowded/ congested/ traffic	13.2% No compelling reason to return
19.5% Five years is too soon	
19.5% Unfriendly people	

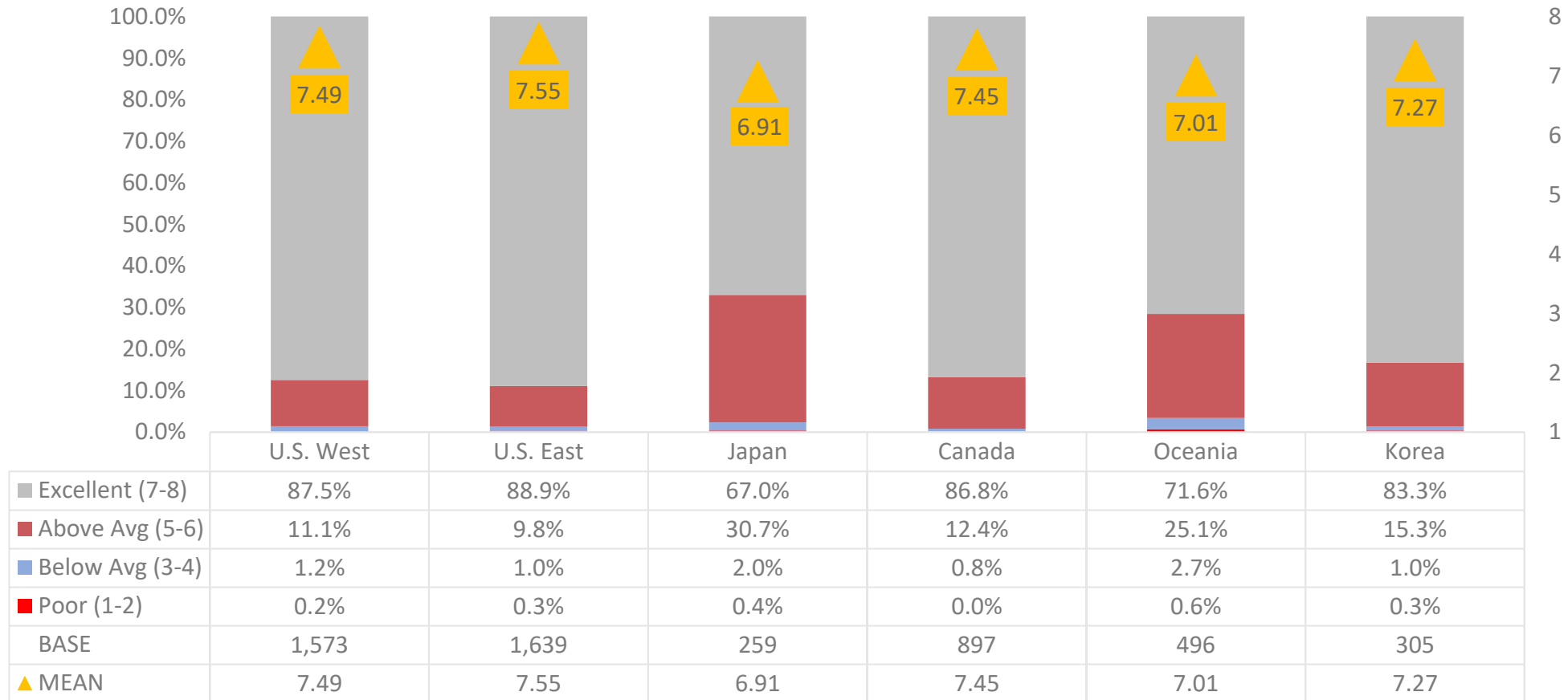
*Caution only 10 Korean visitors responded to this question in 2022.

**Caution small base (n=23).

P= Preliminary Data

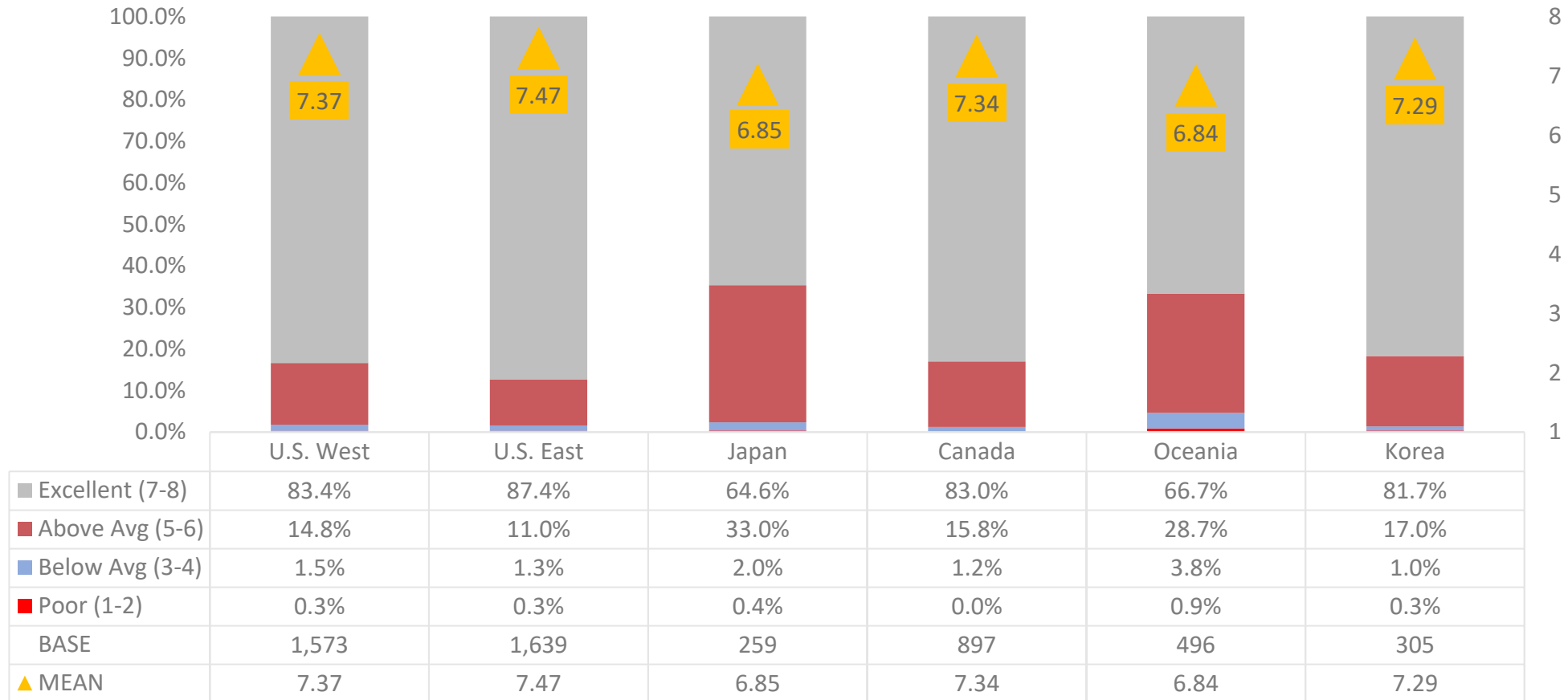
OFFERING A VARIETY OF EXPERIENCES

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



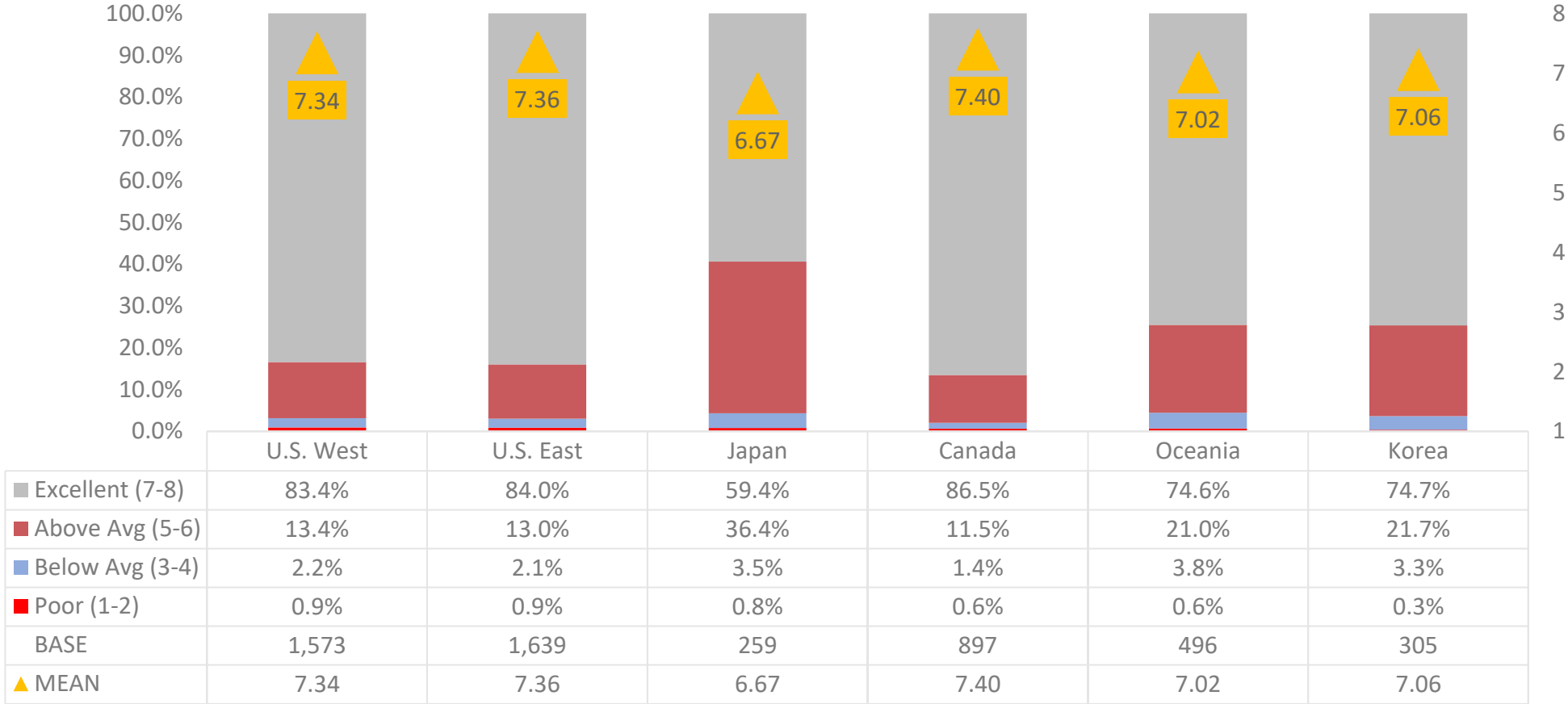
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



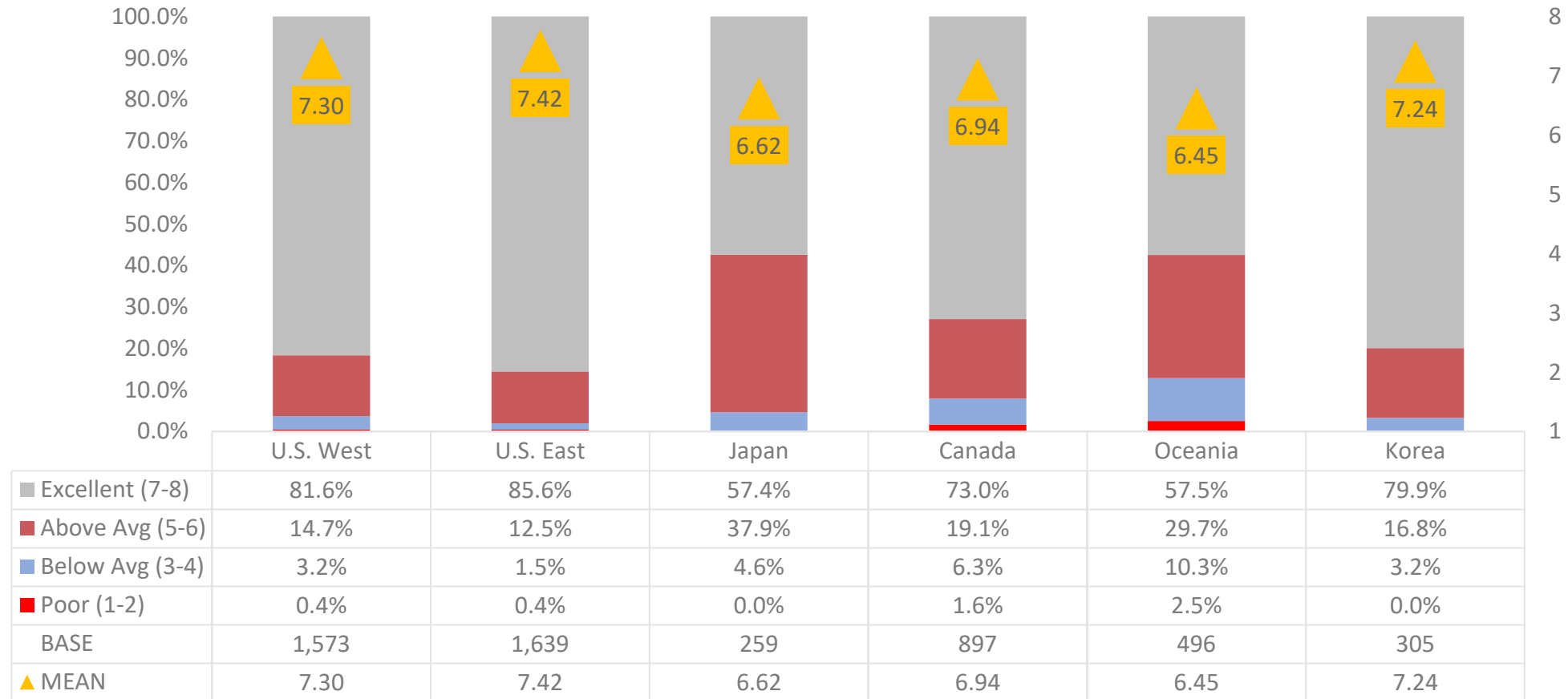
SAFE AND SECURE DESTINATION

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



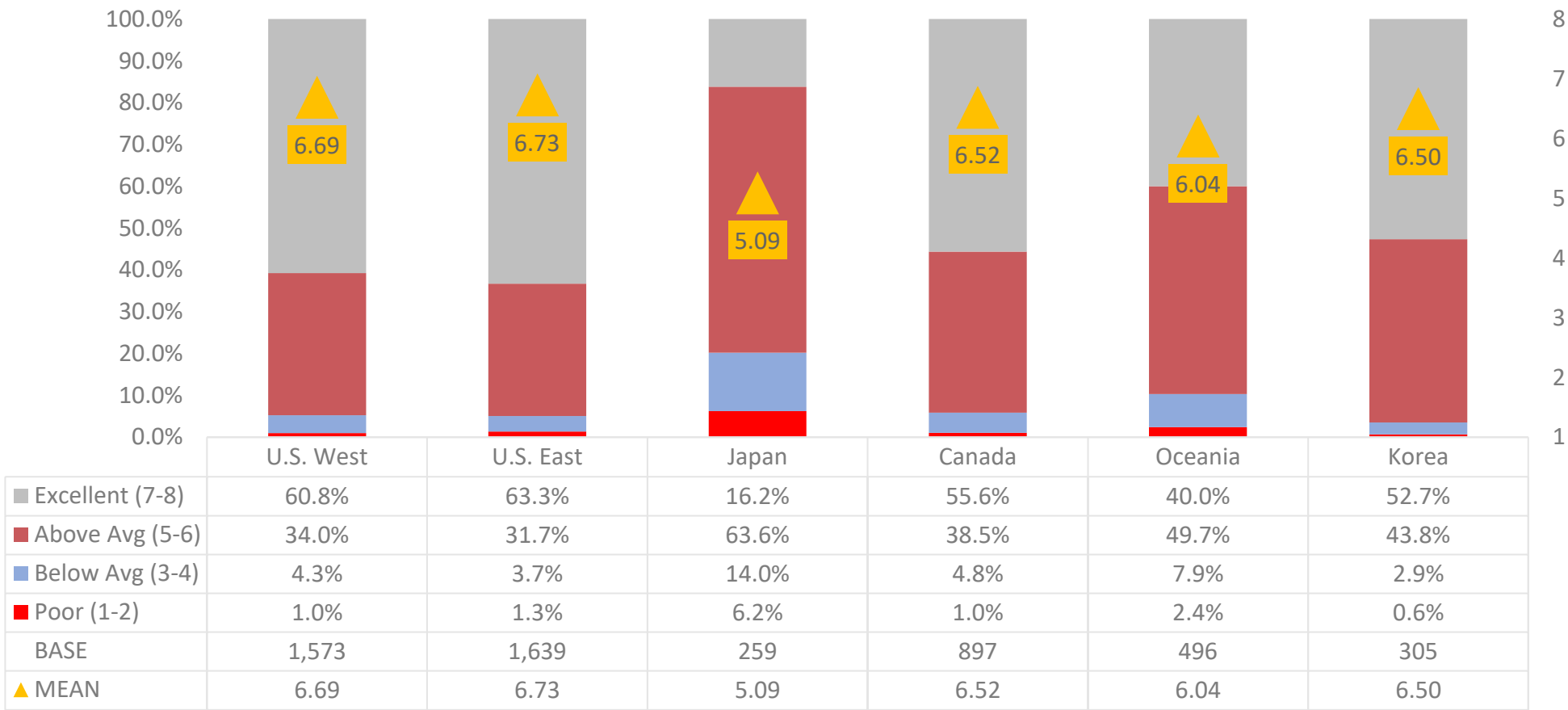
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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



VOLUNTEER/ GIVE-BACK OPPORTUNITIES

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



Section 2 – Activities

ACTIVITIES - SIGHTSEEING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.7%	98.6%	97.2%	98.5%	91.8%	99.4%
On own (self-guided)	84.5%	79.6%	70.8%	84.6%	45.2%	80.3%
Helicopter ride/ airplane tour	2.5%	7.9%	0.4%	5.7%	3.3%	5.1%
Boat tour/ submarine ride/ whale watching	24.1%	30.1%	11.6%	25.8%	16.4%	30.8%
Visit towns/ communities	54.8%	55.6%	42.5%	57.5%	25.9%	39.7%
Private limousine/ van tour/ tour bus	8.8%	15.9%	14.7%	14.7%	27.4%	10.4%
Scenic views/ natural landmarks	59.7%	70.2%	25.3%	69.9%	49.7%	65.9%
Movie/ TV/ film location tours	6.0%	8.6%	3.5%	9.6%	7.5%	24.2%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.3%	96.8%	98.4%	98.3%	94.1%	97.1%
Beach/ sunbathing	86.0%	87.2%	76.6%	90.0%	78.8%	80.9%
Bodyboarding	10.9%	8.3%	4.3%	12.3%	3.6%	4.3%
Standup paddle boarding	6.1%	4.8%	6.2%	5.7%	4.3%	8.6%
Surfing	6.8%	7.8%	4.7%	13.0%	8.9%	12.7%
Canoeing/ kayaking	7.7%	7.4%	2.3%	6.4%	1.5%	4.6%
Swimming in the ocean	70.7%	69.6%	40.0%	77.6%	65.3%	58.8%
Snorkeling	46.3%	42.5%	20.1%	54.3%	20.4%	59.1%
Freediving	1.7%	1.6%	0.8%	1.1%	0.4%	0.6%
Windsurfing/ Kitesurfing	0.1%	0.4%	0.4%	0.8%	0.0%	0.0%
Jet skiing/ Parasailing	1.4%	1.8%	2.7%	1.6%	1.9%	3.6%
Scuba diving	2.6%	2.3%	1.5%	2.4%	0.4%	2.0%
Fishing	3.1%	2.3%	0.8%	2.6%	0.6%	0.3%
Golf	6.7%	6.1%	7.1%	4.7%	1.2%	7.7%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.3%	96.8%	98.4%	98.3%	94.1%	97.1%
Running/ jogging/ fitness/ walking	25.7%	25.0%	26.5%	22.8%	27.1%	13.9%
Cycling	2.5%	4.4%	4.3%	4.4%	1.7%	3.2%
Spa	7.6%	7.9%	3.5%	3.4%	5.0%	7.2%
Hiking	43.9%	48.8%	25.1%	55.5%	21.8%	28.0%
Backpacking/ camping	1.5%	1.5%	0.4%	2.2%	1.1%	2.0%
Agritourism	12.3%	16.1%	7.8%	16.0%	5.7%	18.1%
Sports event or tournament	1.7%	1.0%	0.8%	0.9%	0.8%	1.3%
Parks/ botanical gardens	36.6%	42.8%	20.0%	44.5%	28.4%	22.9%
Waterparks	2.2%	1.6%	3.9%	1.8%	1.0%	5.6%
Mountain tubing/ waterfall rappel	3.4%	2.8%	0.0%	1.6%	0.6%	1.7%
Zip-lining	4.2%	4.4%	0.4%	2.6%	1.7%	0.4%
Skydiving	0.1%	0.4%	1.1%	0.0%	0.0%	1.9%
All-terrain vehicle (ATV)	3.7%	4.9%	0.8%	2.9%	3.5%	9.1%
Horseback riding	1.2%	0.9%	1.9%	0.9%	0.0%	0.7%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	99.2%	98.6%	98.8%	98.7%	99.6%	98.0%
Lunch/ sunset/ dinner/ evening cruise	23.2%	28.5%	15.8%	25.2%	19.1%	28.5%
Live music/ stage show	29.9%	34.3%	22.9%	29.1%	20.1%	14.5%
Nightclub/ dancing/ bar/ karaoke	8.2%	7.3%	3.8%	5.4%	7.5%	3.6%
Fine dining	46.1%	47.9%	34.4%	37.9%	32.6%	51.9%
Family restaurant	64.7%	60.8%	33.5%	67.5%	64.5%	46.1%
Fast food	34.5%	37.2%	58.0%	51.5%	54.6%	56.9%
Food truck	45.1%	45.2%	26.4%	50.1%	30.0%	66.8%
Café/ coffee house	52.0%	50.2%	62.2%	62.6%	64.7%	68.2%
Ethnic dining	28.7%	28.9%	11.3%	23.5%	10.0%	24.0%
Farm-to-table cuisine	16.4%	19.2%	19.9%	13.3%	3.5%	3.0%
Prepared own meal	43.8%	36.3%	24.3%	51.4%	22.5%	20.2%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	97.4%	97.2%	99.2%	97.8%	97.7%	95.8%
Malls/ department stores	43.3%	43.7%	84.8%	58.0%	72.2%	76.8%
Designer boutiques	16.5%	18.0%	20.3%	16.9%	16.6%	3.7%
Hotel/ resort stores	36.2%	41.4%	36.1%	32.0%	32.8%	30.4%
Swap meet/ flea market	16.9%	14.5%	5.5%	13.1%	7.8%	3.9%
Discount/ outlet stores	14.7%	14.5%	28.4%	16.1%	27.9%	60.8%
Supermarkets	62.7%	53.6%	62.3%	61.1%	46.8%	48.9%
Farmer's market	36.5%	30.7%	23.0%	43.1%	15.0%	14.6%
Convenience stores	53.3%	52.2%	59.6%	57.9%	61.2%	56.3%
Duty free stores	5.8%	4.7%	21.8%	7.0%	10.8%	35.8%
Hawai'i –made products	48.4%	50.7%	28.8%	51.8%	33.4%	28.8%
Local shops and artisans	60.4%	60.7%	17.6%	62.6%	43.5%	21.2%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	68.9%	78.7%	57.3%	76.5%	68.0%	66.7%
Historic military sites and museums	19.1%	33.3%	12.8%	26.9%	39.2%	26.2%
Historic Hawaiian sites and museums	30.8%	38.5%	16.5%	37.6%	22.4%	10.3%
Other historical sites, museums, and homes	13.6%	16.0%	5.8%	14.5%	8.0%	21.3%
Art museums	2.9%	3.0%	4.3%	3.7%	3.4%	3.0%
Art galleries and exhibitions	9.8%	8.8%	5.1%	9.2%	7.6%	2.3%
Lū'au/ Polynesian show/ hula show	28.9%	42.7%	17.1%	34.7%	19.0%	20.0%
Lesson- ex. ukulele, hula, canoe, lei making	6.8%	7.8%	7.0%	5.7%	2.7%	6.3%
Play/ concert/ theatre	2.5%	2.5%	4.7%	3.3%	1.8%	2.2%
Art/ craft fair	11.3%	9.0%	2.4%	8.7%	5.0%	4.6%
Festival /event	6.3%	5.3%	5.1%	5.8%	4.0%	3.3%

ACTIVITIES - TRANSPORTATION

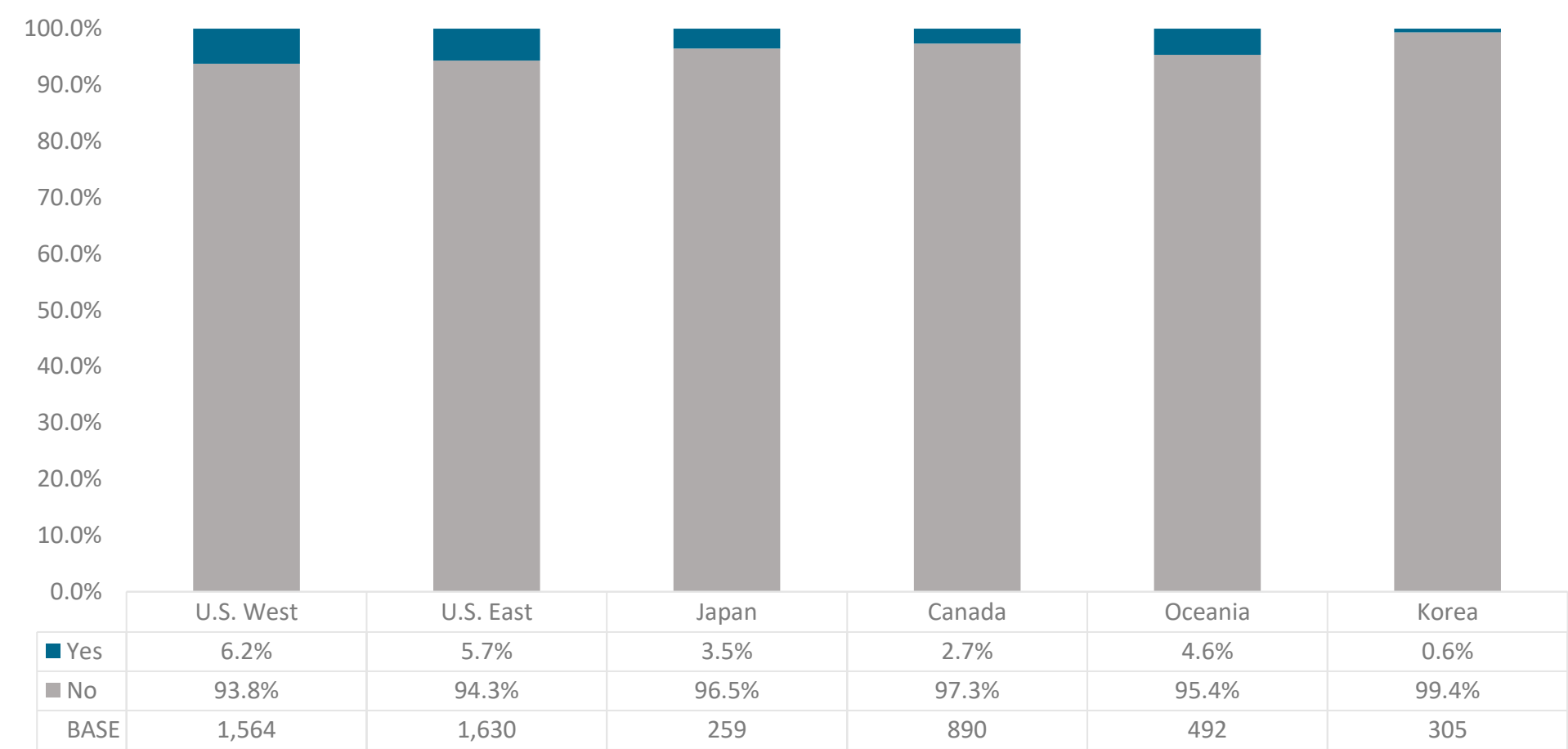
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	93.8%	93.0%	97.3%	96.6%	97.3%	96.6%
Airport shuttle	14.4%	14.8%	19.8%	15.7%	32.2%	12.5%
Trolley	2.5%	4.8%	39.7%	5.1%	17.2%	21.3%
Public bus	3.4%	5.6%	26.0%	11.3%	25.8%	14.4%
Tour bus/ tour van	8.1%	16.4%	16.6%	14.7%	25.8%	20.7%
Taxi/ limo	6.1%	8.6%	32.8%	13.3%	35.0%	27.4%
Rental car	76.3%	67.2%	28.9%	73.7%	21.8%	61.6%
Ride share	16.9%	23.6%	22.2%	21.3%	43.4%	18.4%
Car share (i.e. Hui, Turo)	6.1%	5.7%	1.9%	5.3%	3.3%	1.6%
Bicycle rental	1.7%	2.8%	5.0%	2.8%	1.7%	0.6%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
TOTAL	33.9%	32.6%	20.3%	17.9%	12.6%	22.1%
Visit friends/ family	30.1%	28.5%	19.5%	14.6%	11.0%	21.4%
Giving back to the local community	5.8%	5.2%	0.8%	3.9%	1.8%	1.0%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

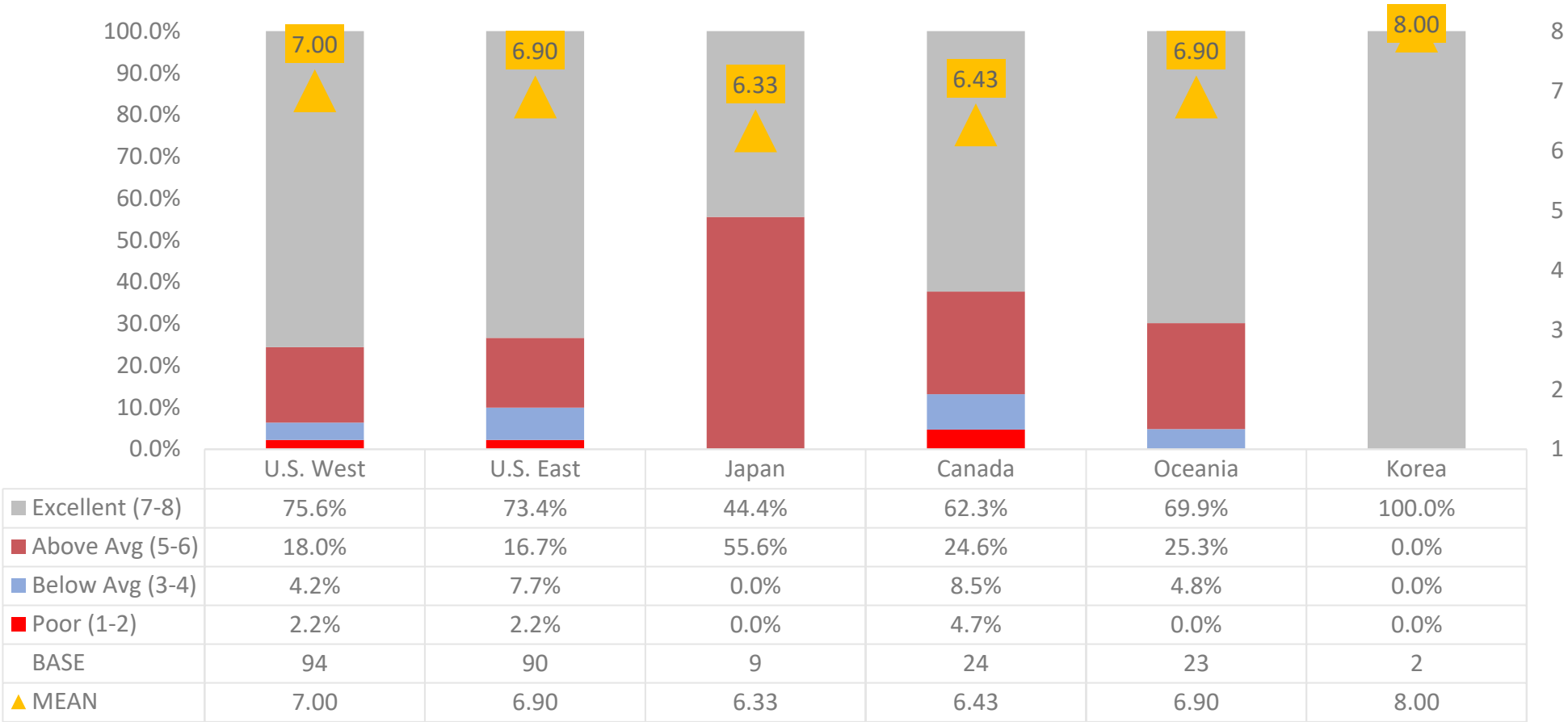


DISABLED TRAVELER – REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Mobility aid	63.8%	75.0%	55.6%	69.9%	74.7%	0.0%
Personal assistance	29.8%	13.0%	0.0%	21.6%	16.4%	50.0%
Other	9.3%	7.6%	11.1%	8.5%	8.2%	0.0%
NA- No one needed assistance	7.4%	4.3%	33.3%	0.0%	4.1%	50.0%
Orientation and Mobility Assistance	5.1%	2.2%	11.1%	0.0%	4.8%	0.0%
ASL Interpreter/ texting/ captioning	1.1%	1.1%	0.0%	0.0%	4.1%	0.0%
Service/ assistance animal	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Lift-equipped van	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	97	92	9	24	23	2

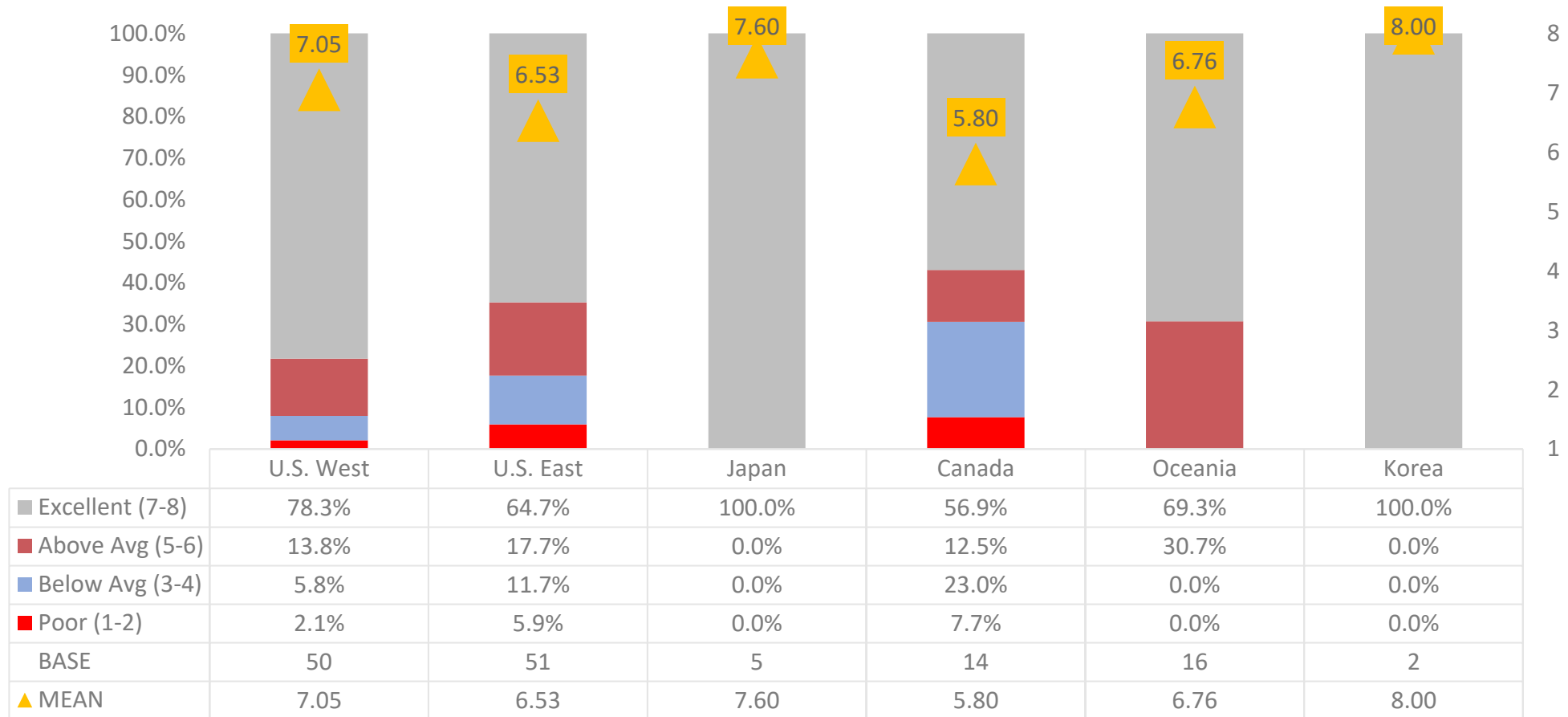
OVERALL ACCESSIBILITY - AIRPORTS

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



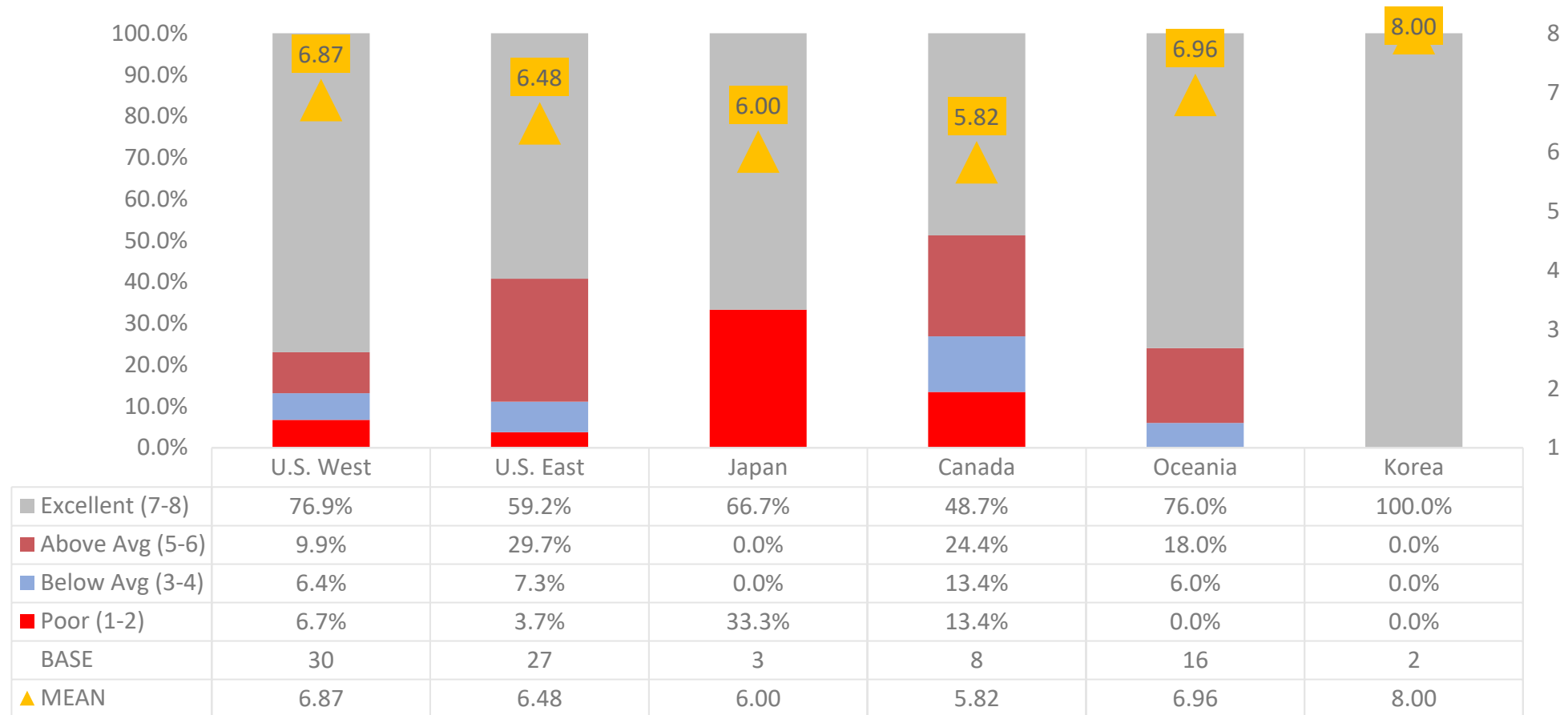
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



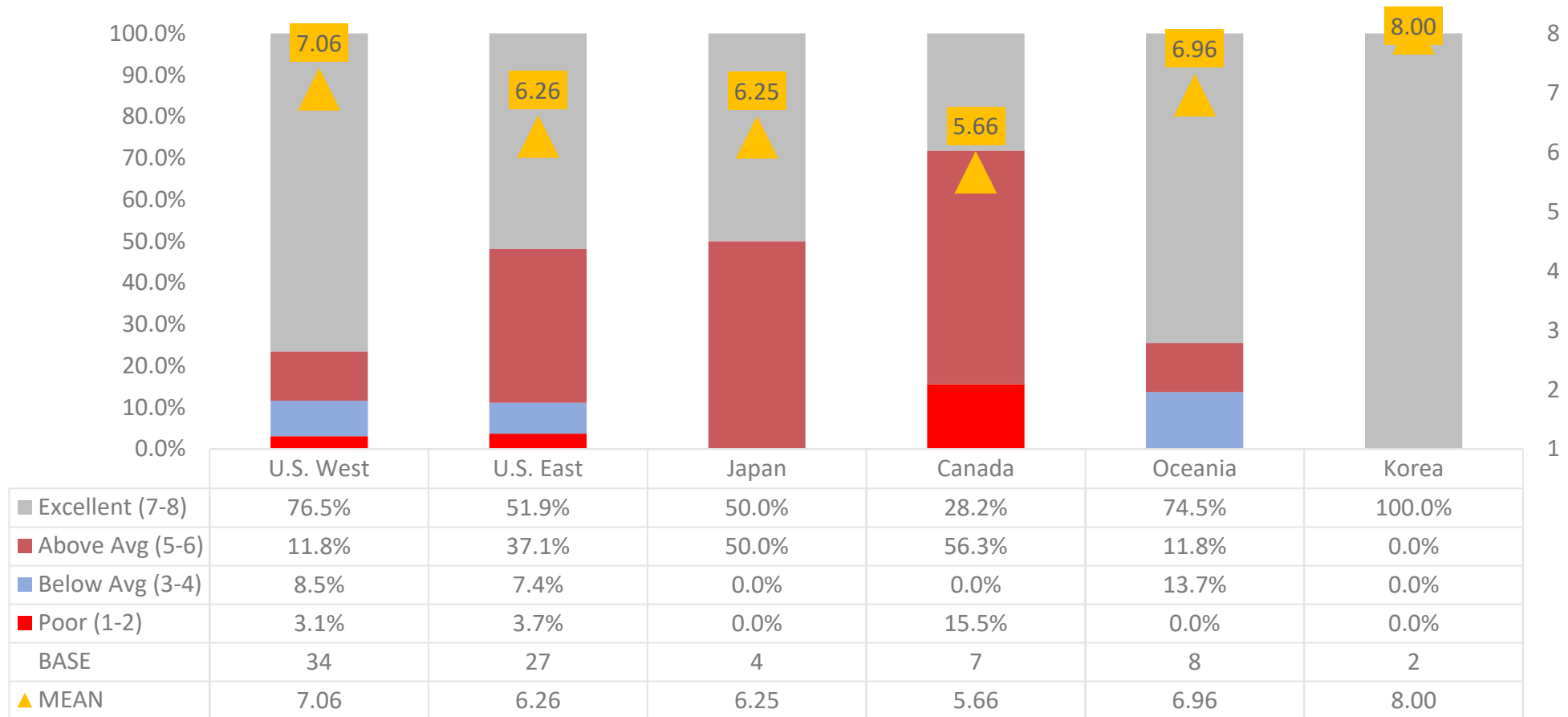
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



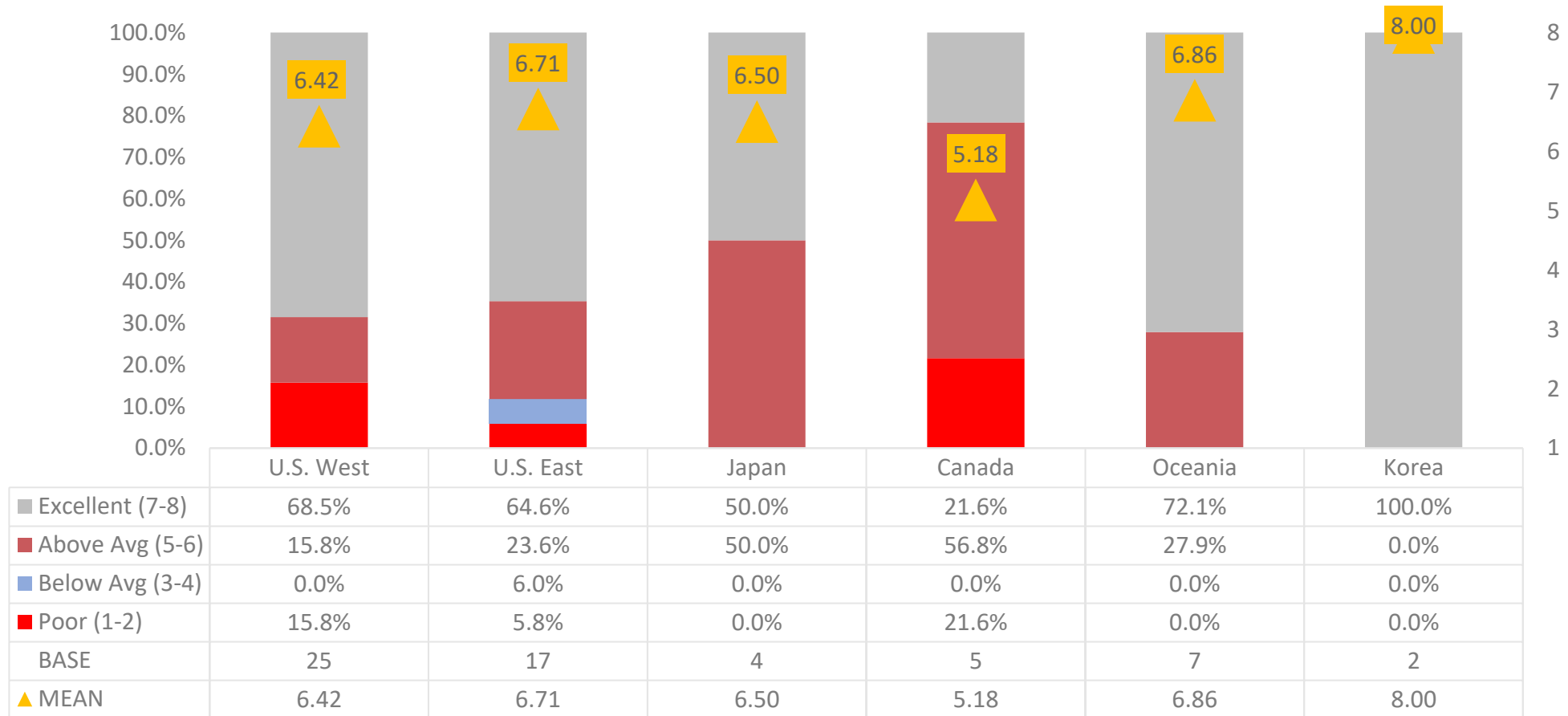
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



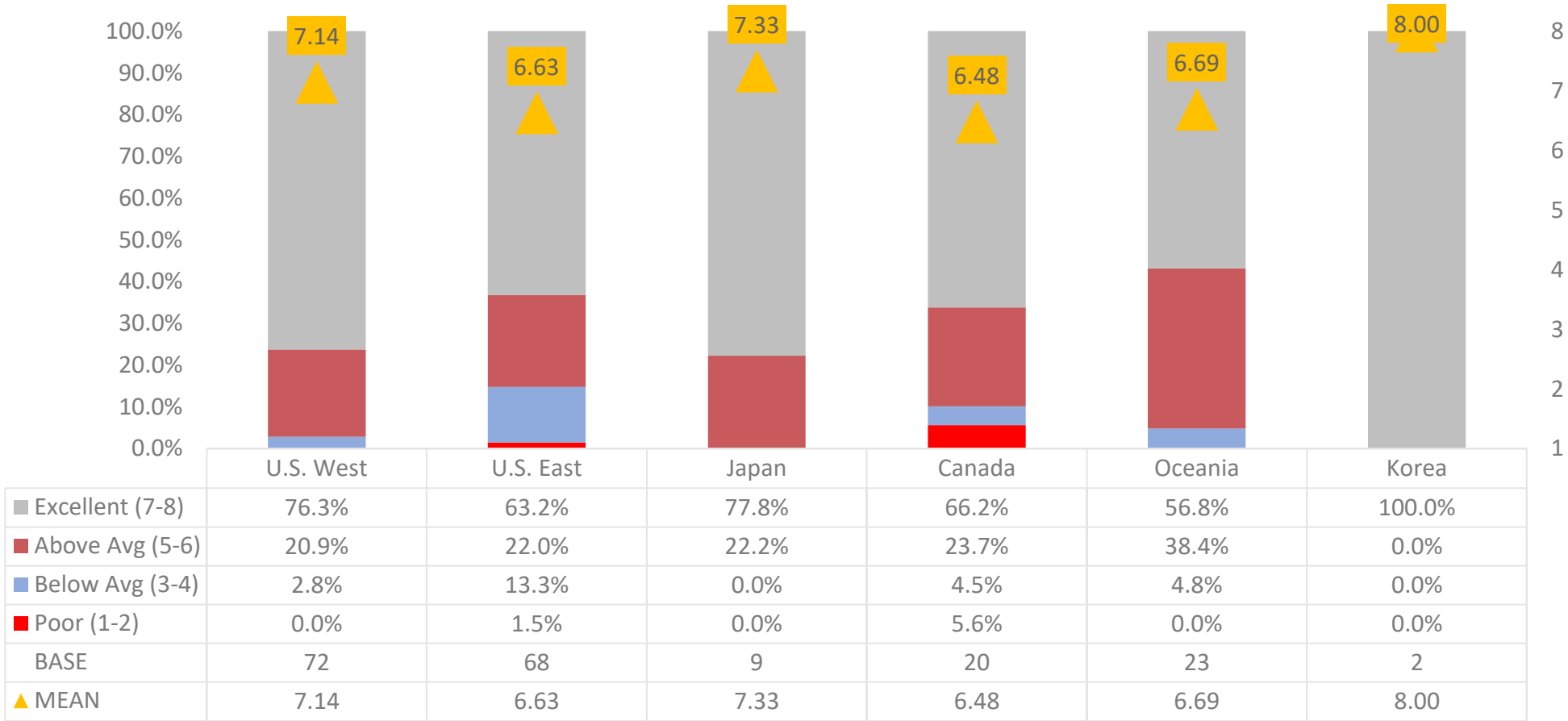
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



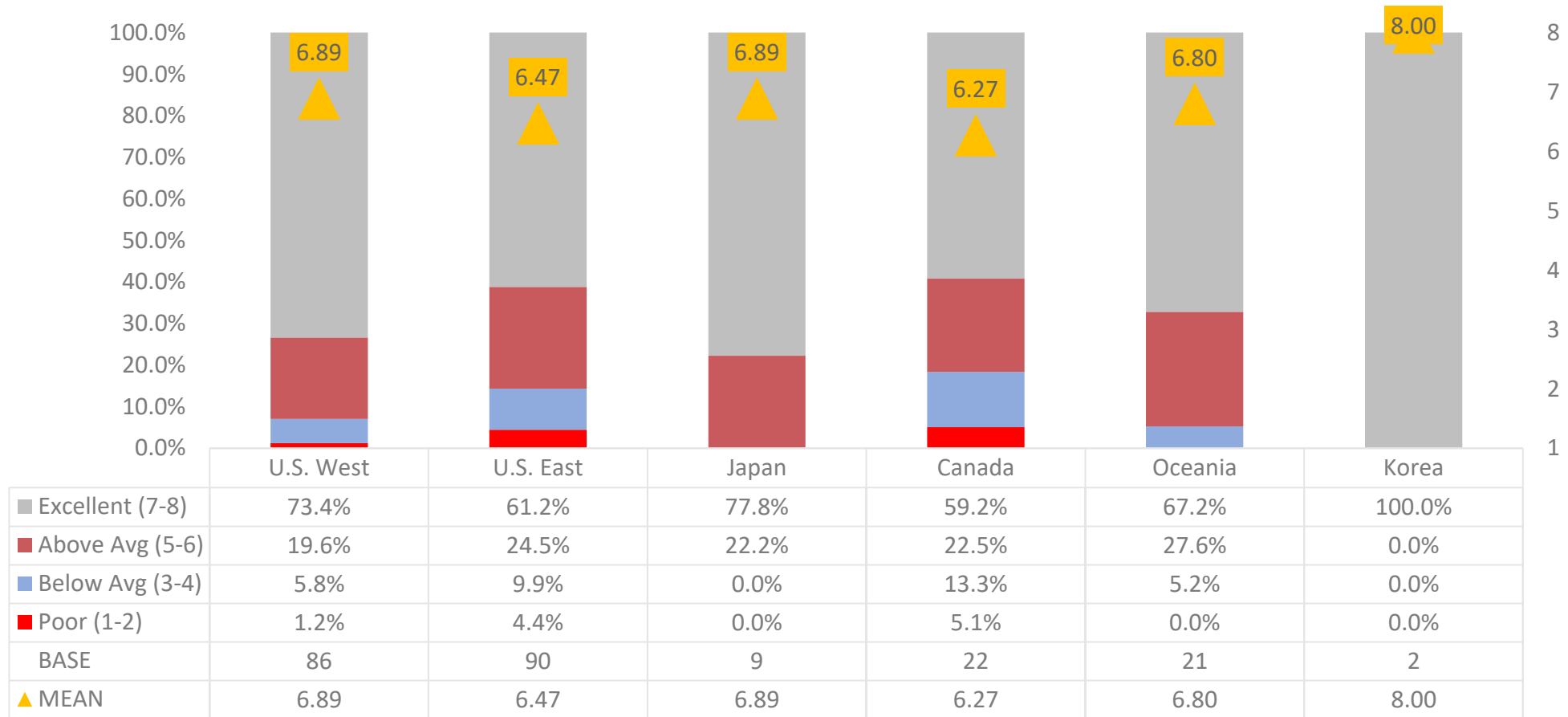
OVERALL ACCESSIBILITY - HOTELS

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



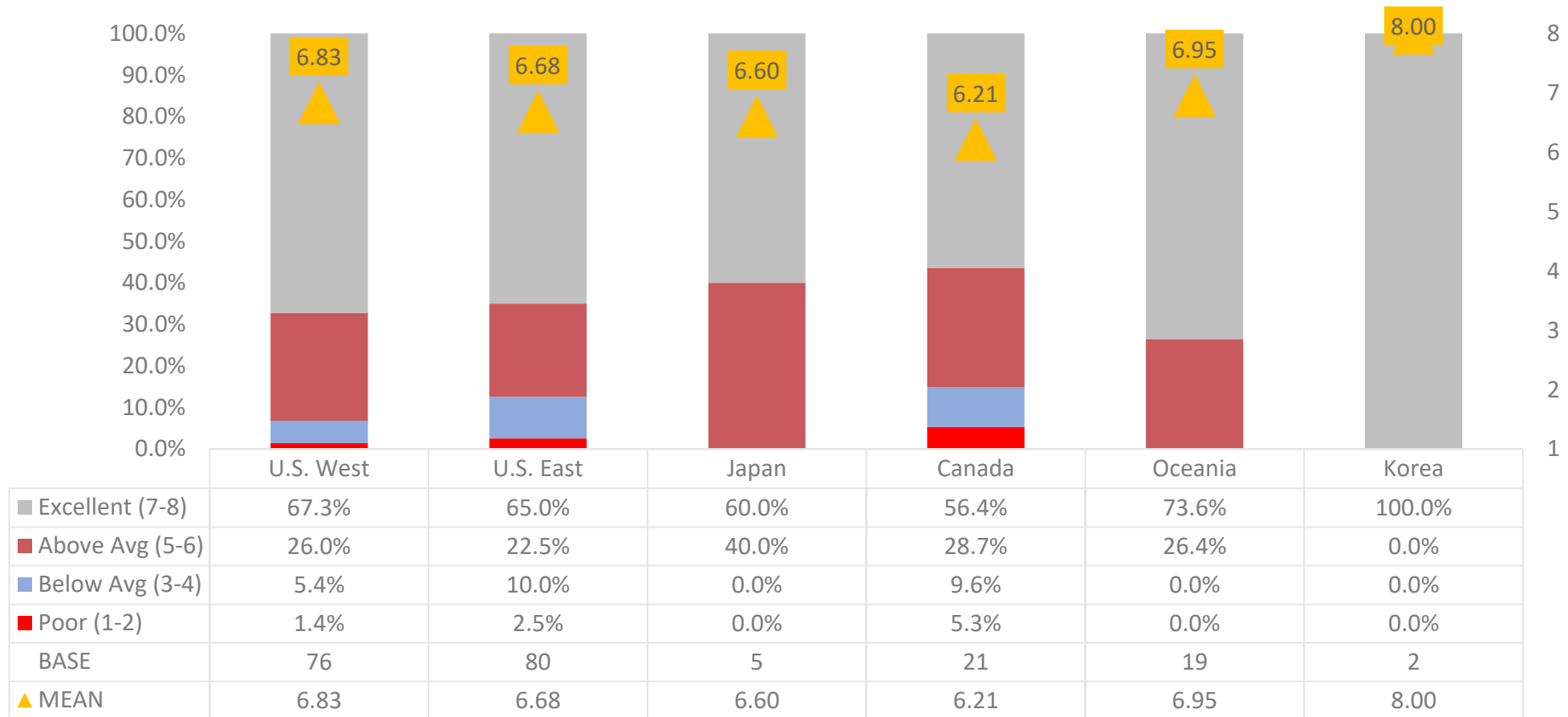
OVERALL ACCESSIBILITY – RESTAURANTS

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



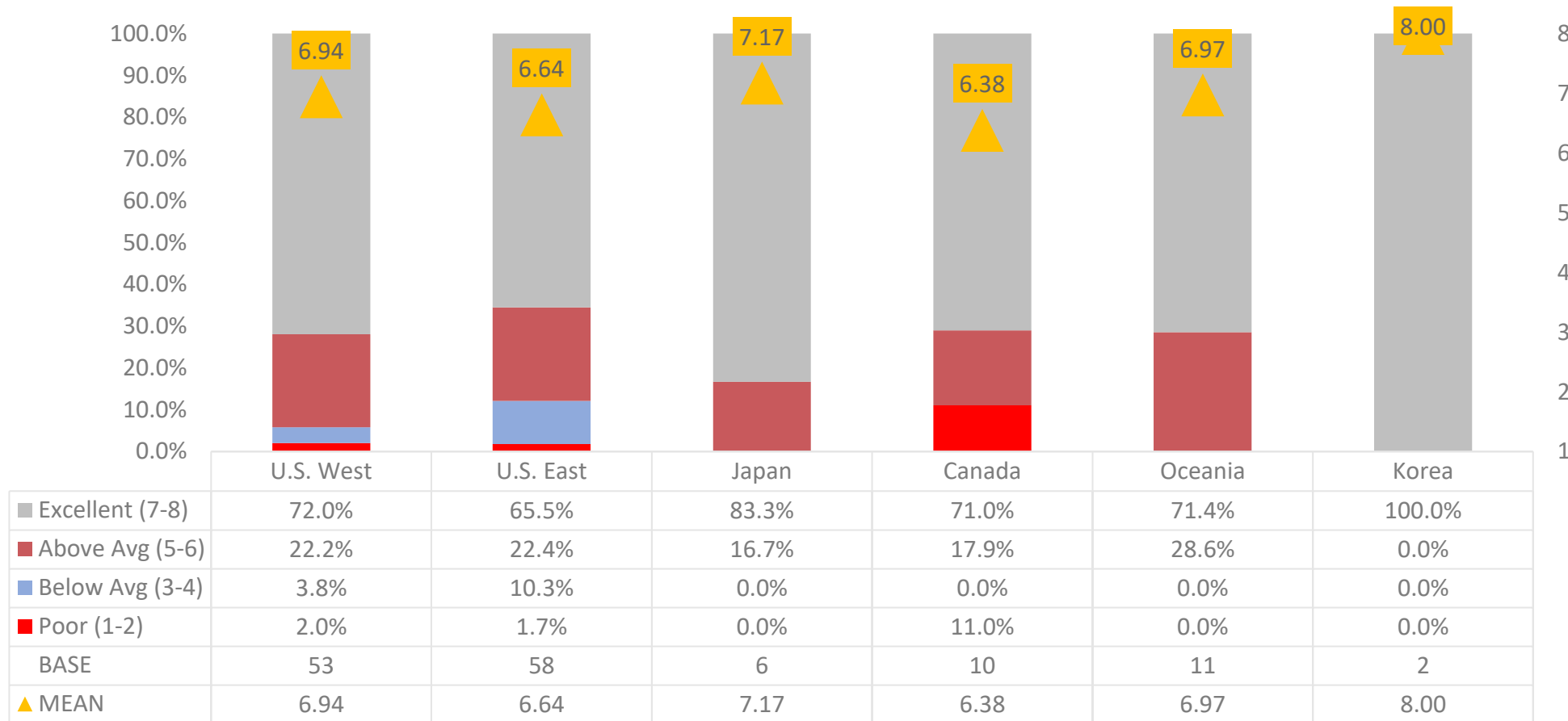
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



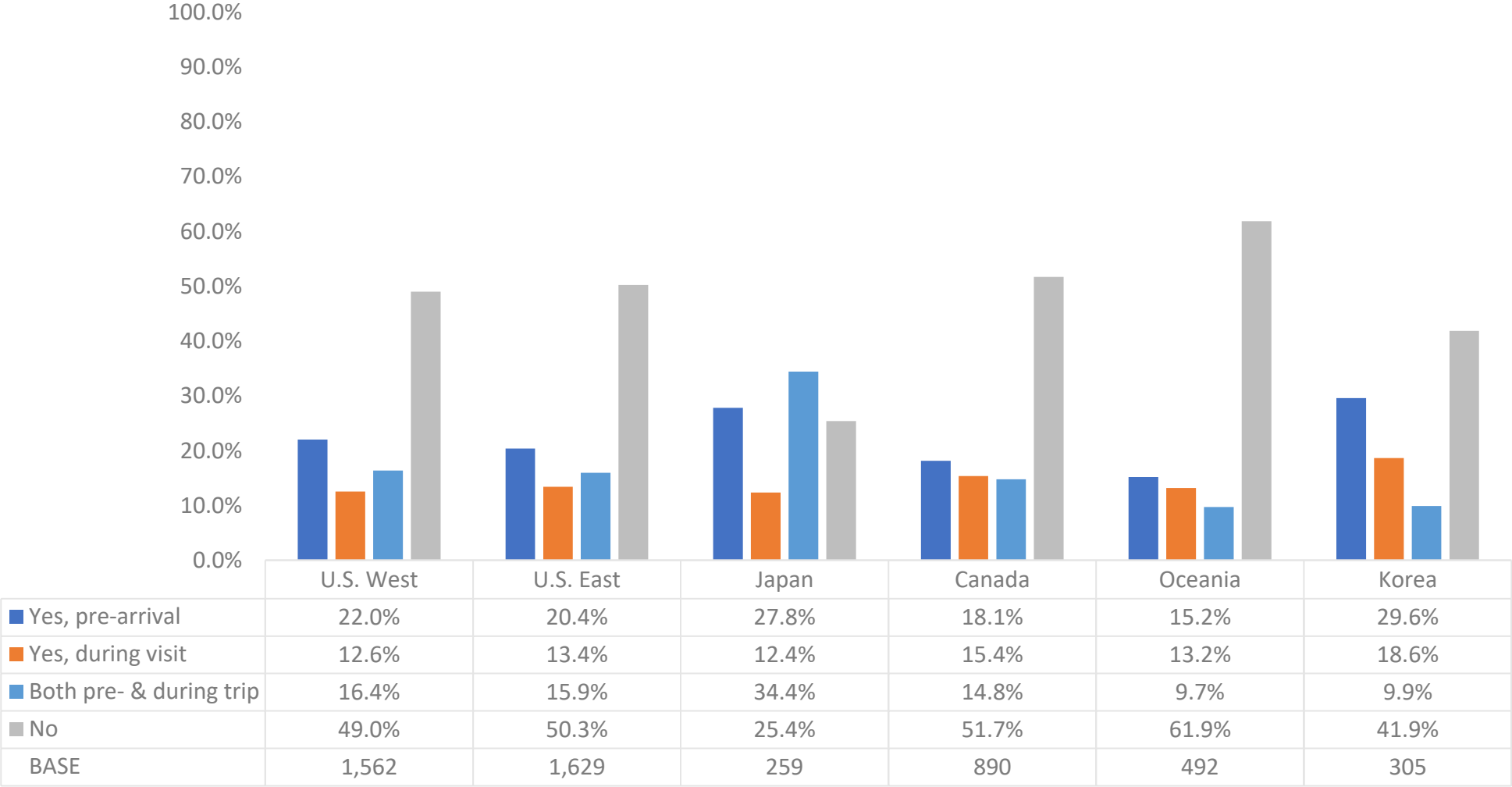
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

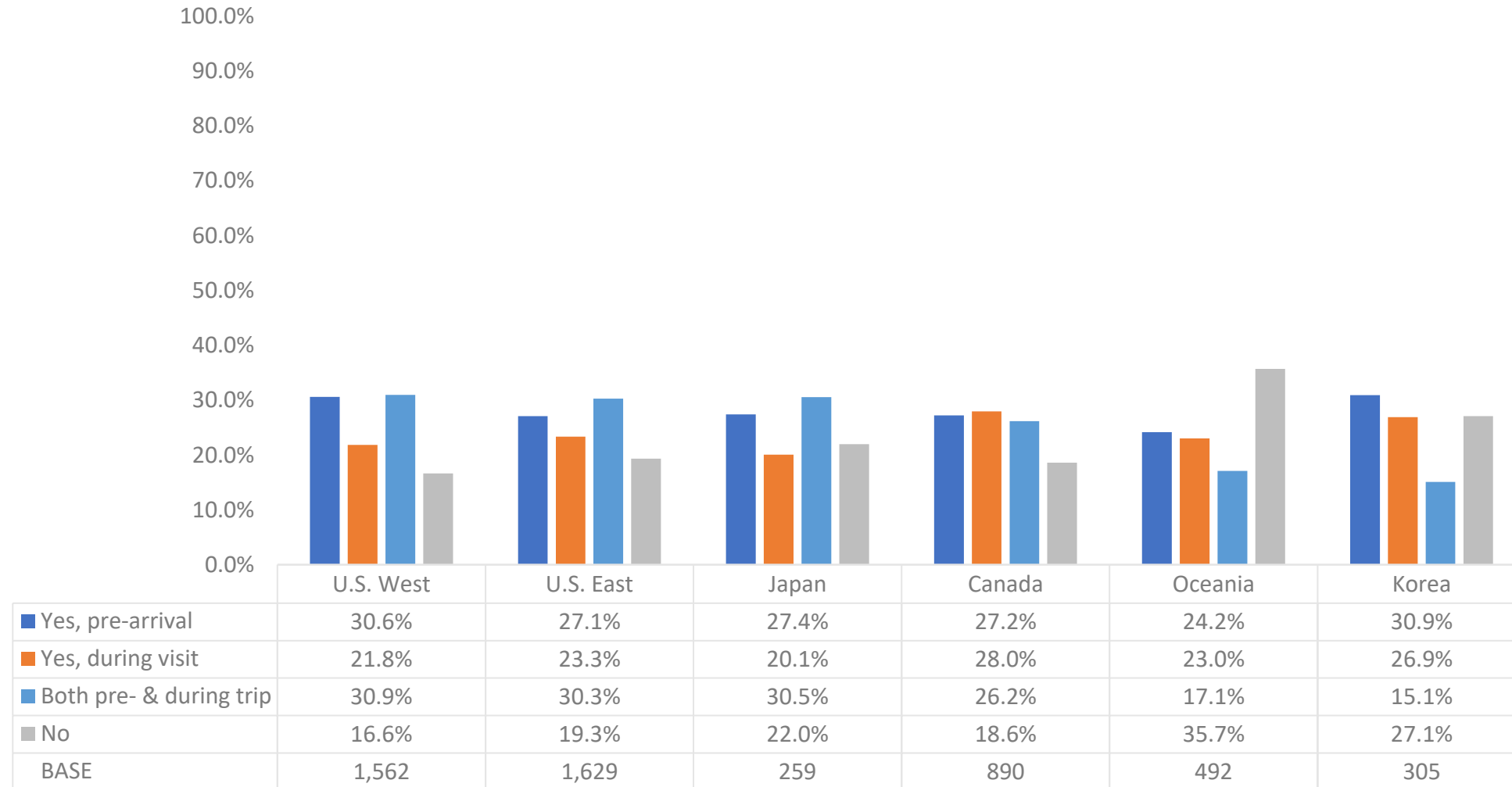


Section 4 – Alternative Messaging

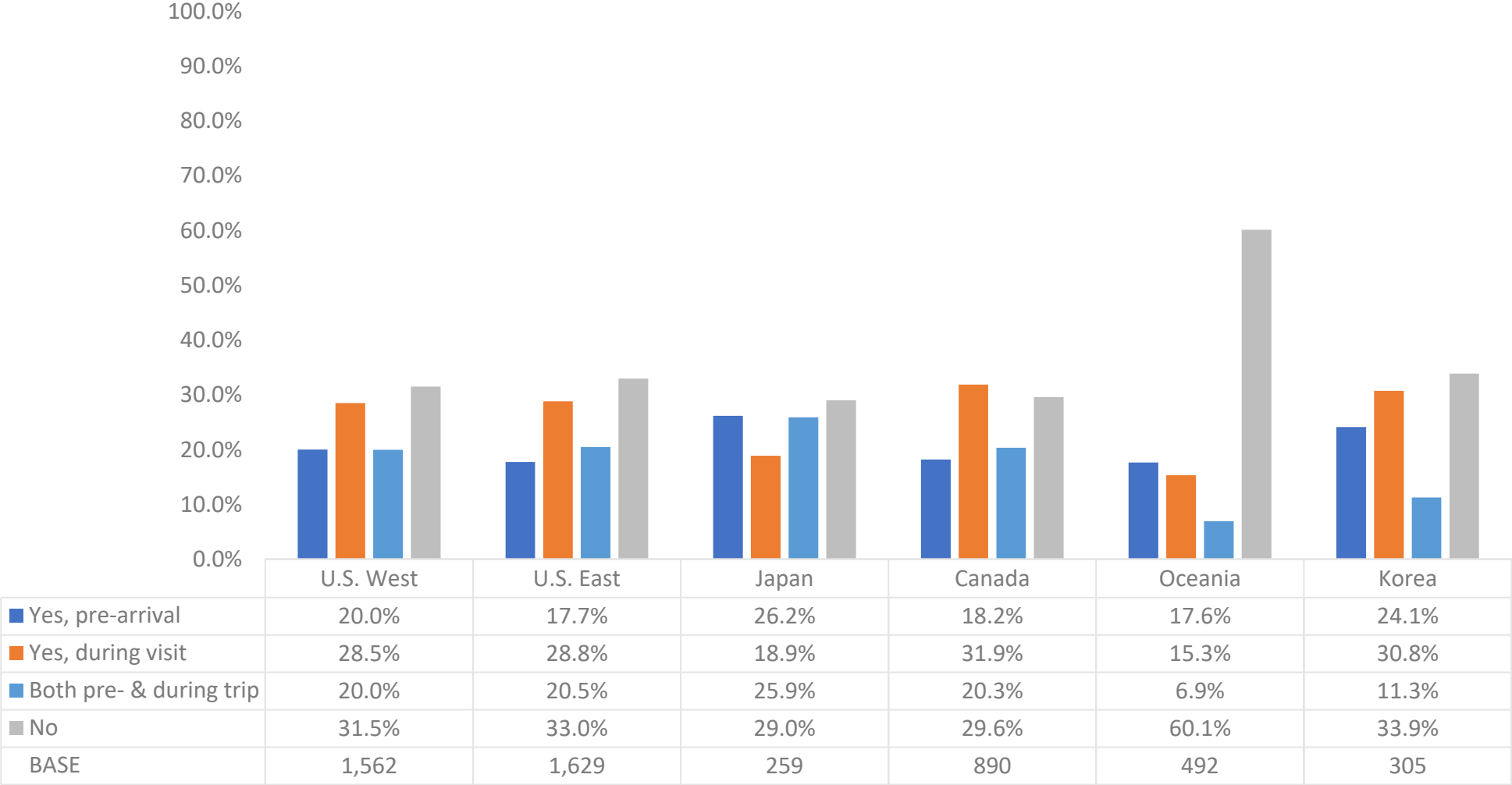
SAFE AND RESPONSIBLE TRAVEL



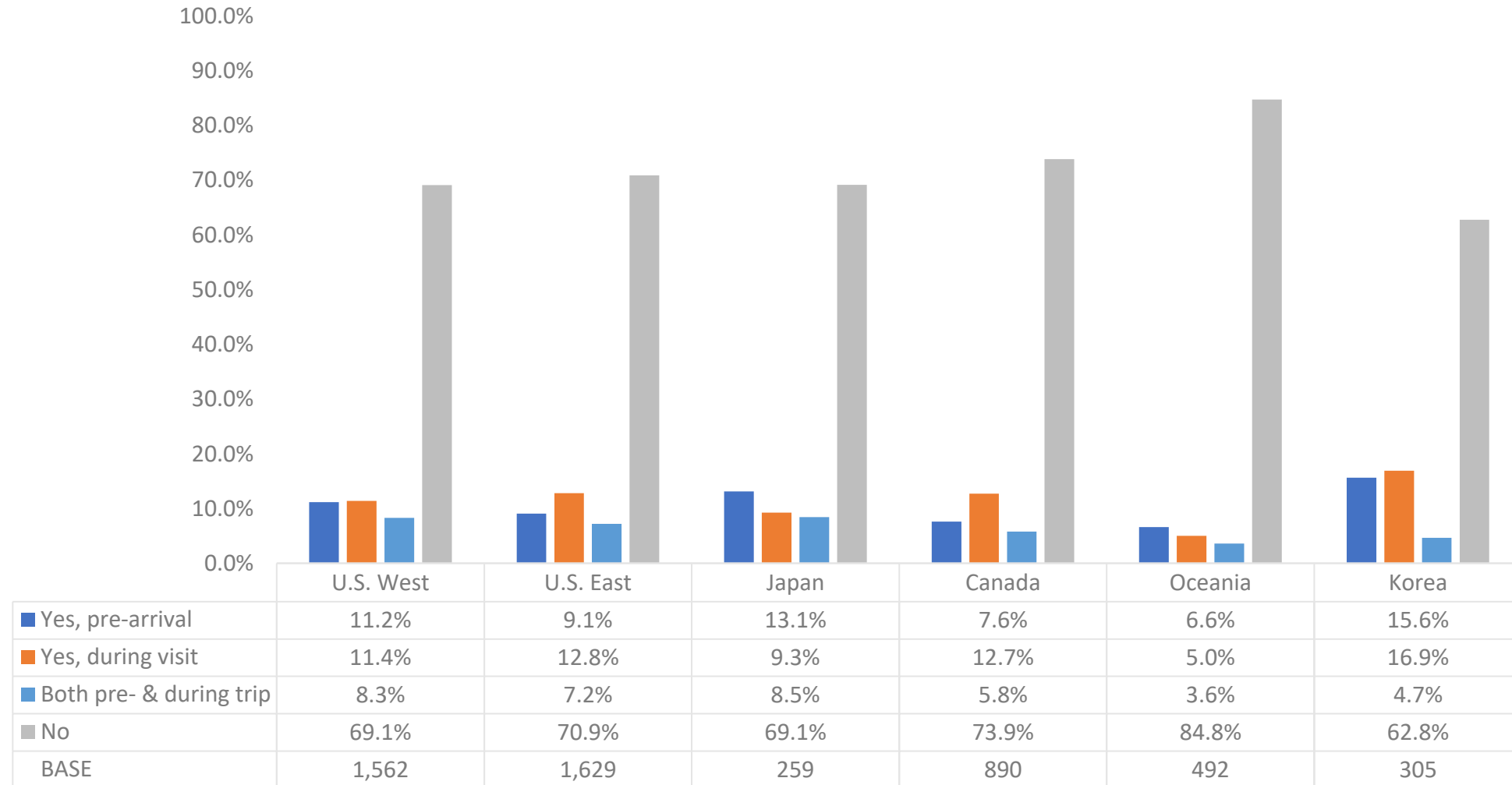
CARING FOR AND RESPECTING HAWAI'I'S CULTURE, PEOPLE, AND ENVIRONMENT



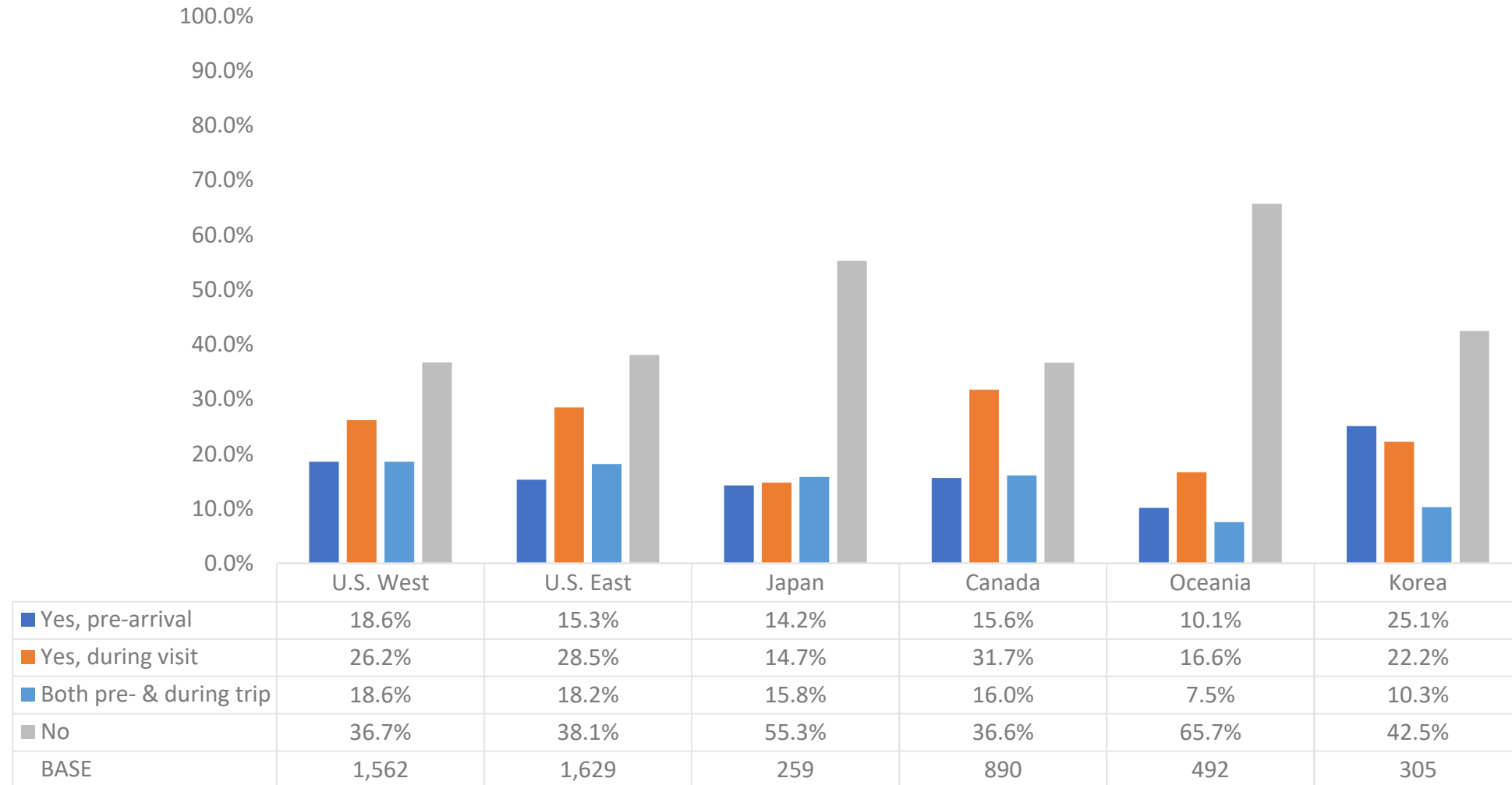
OCEAN AND HIKING SAFETY



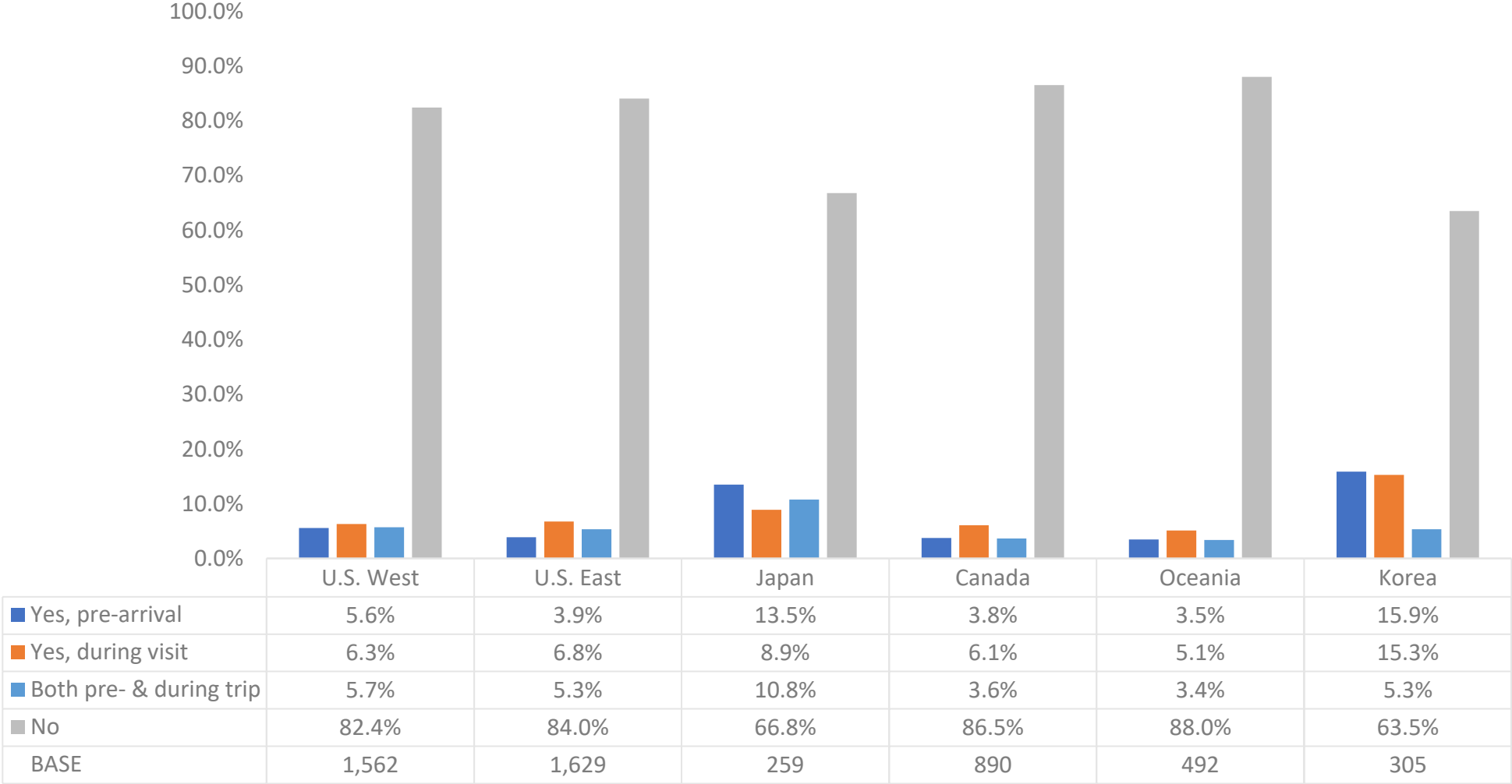
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL



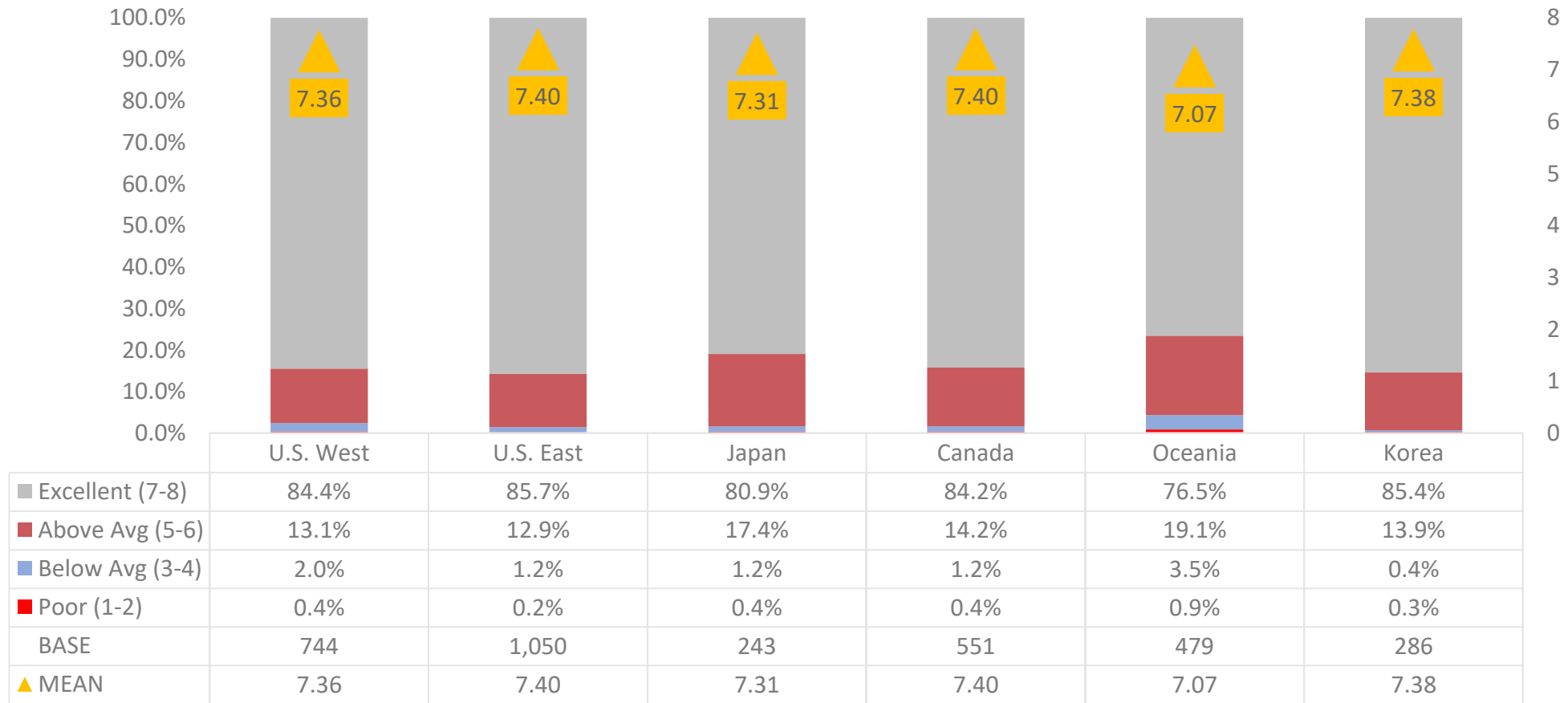
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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

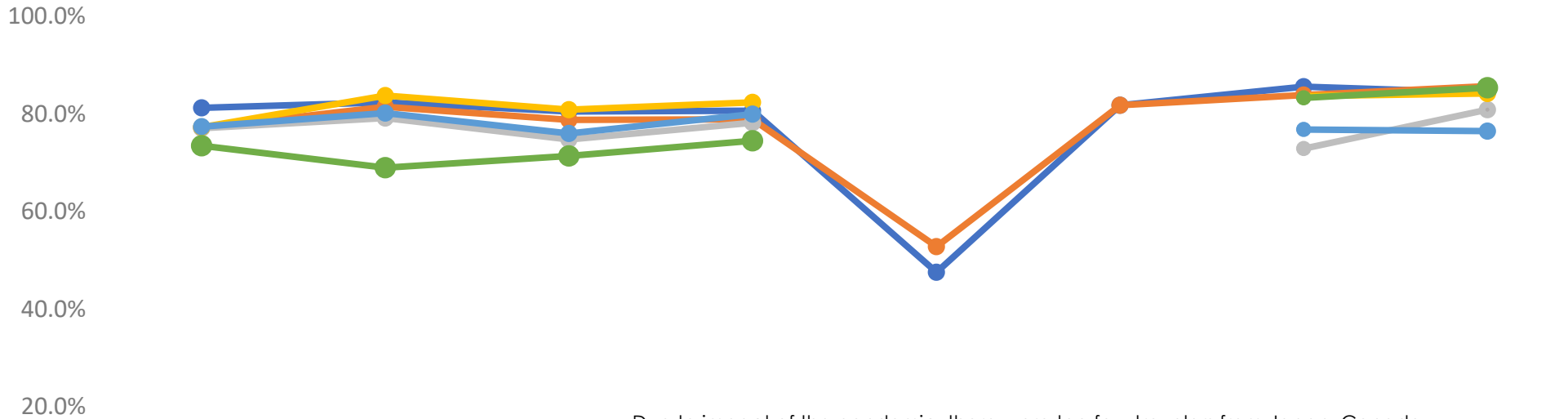


SATISFACTION – O‘AHU

- **Gender:** Females from **U.S. West** and **U.S. East** expressed higher levels of satisfaction compared to males from these markets.
- **Islands visited:** Visitors from **U.S. West, U.S. East, Japan,** and **Korea** whose trip consisted of staying on just O‘ahu gave the island a higher mean satisfaction score than those who also visited one or more of the Neighbor Islands during their stay.
- **Travel party size:** Those visiting from the **U.S. West** and **Japan** in larger travel parties of three or more individuals gave higher mean satisfaction scores.
- **Age:** Younger travelers under the age of 35 from **U.S. West** and **Japan** gave statistically higher satisfaction scores than older visitors (65+) from these visitor markets.
- **Trips to Hawai‘i:** First-time visitors from **Japan** were more satisfied with their stay compared to repeat visitors.
- **Household income:** Satisfaction is lowest among more affluent (\$150K+) visitors from **U.S. West**.

SATISFACTION - O'AHU

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



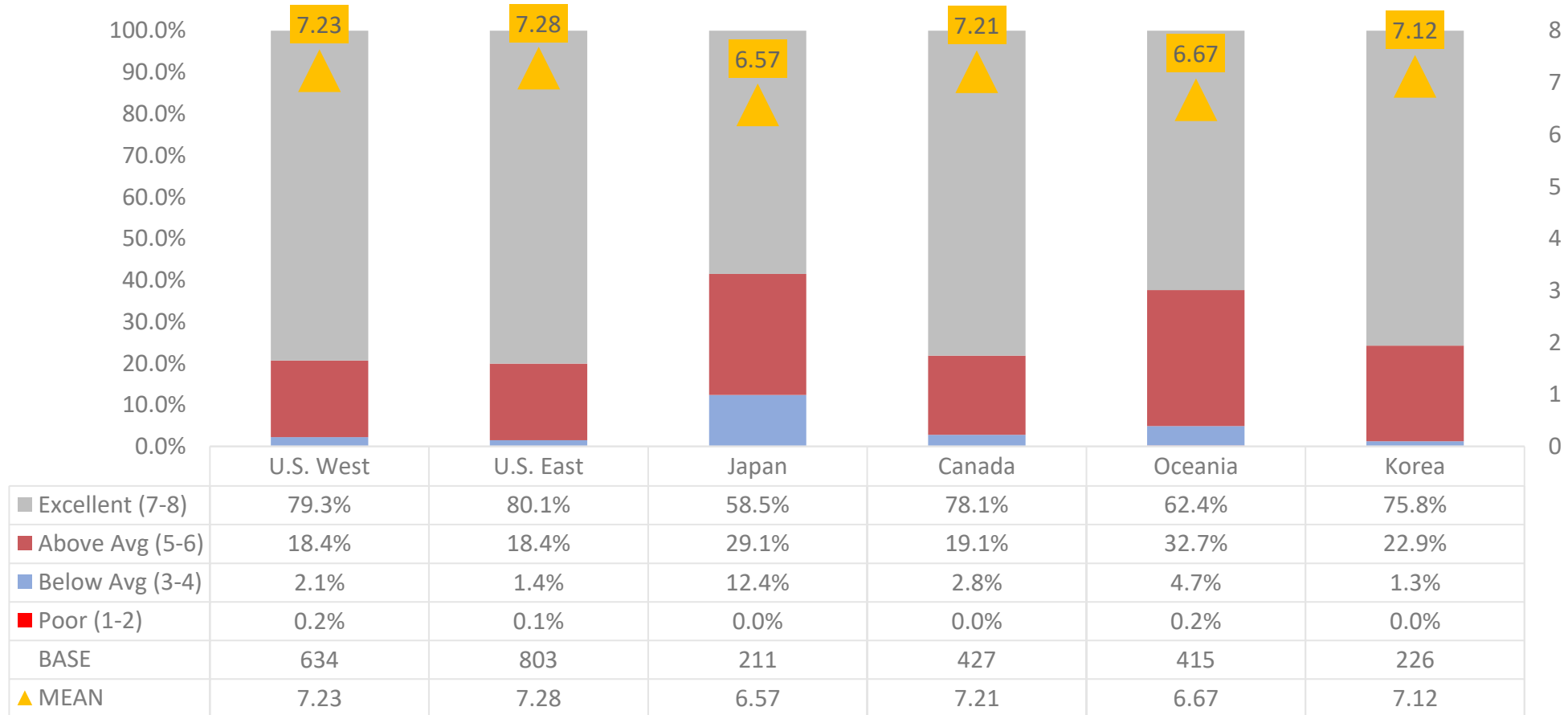
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	81.3%	82.4%	80.5%	80.7%	47.6%	81.8%	85.6%	84.4%
U.S. East	77.2%	81.5%	78.8%	78.9%	52.8%	81.8%	83.9%	85.7%
Japan	77.1%	79.2%	74.8%	78.2%			72.9%	80.9%
Canada	77.3%	83.8%	80.9%	82.4%			83.7%	84.2%
Oceania	77.4%	80.2%	76.0%	80.0%			76.8%	76.5%
Korea	73.5%	69.0%	71.4%	74.5%			83.3%	85.4%

P= Preliminary Data

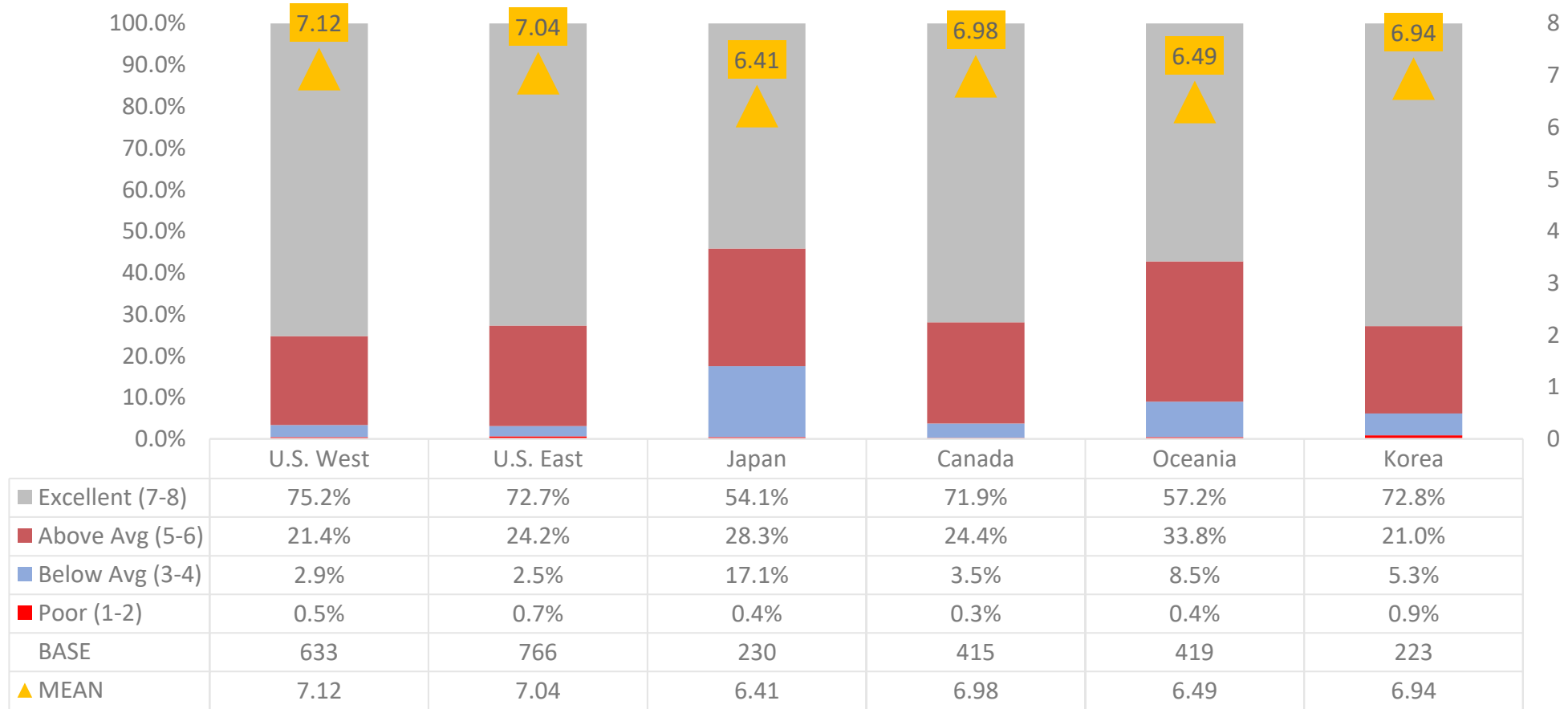
ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



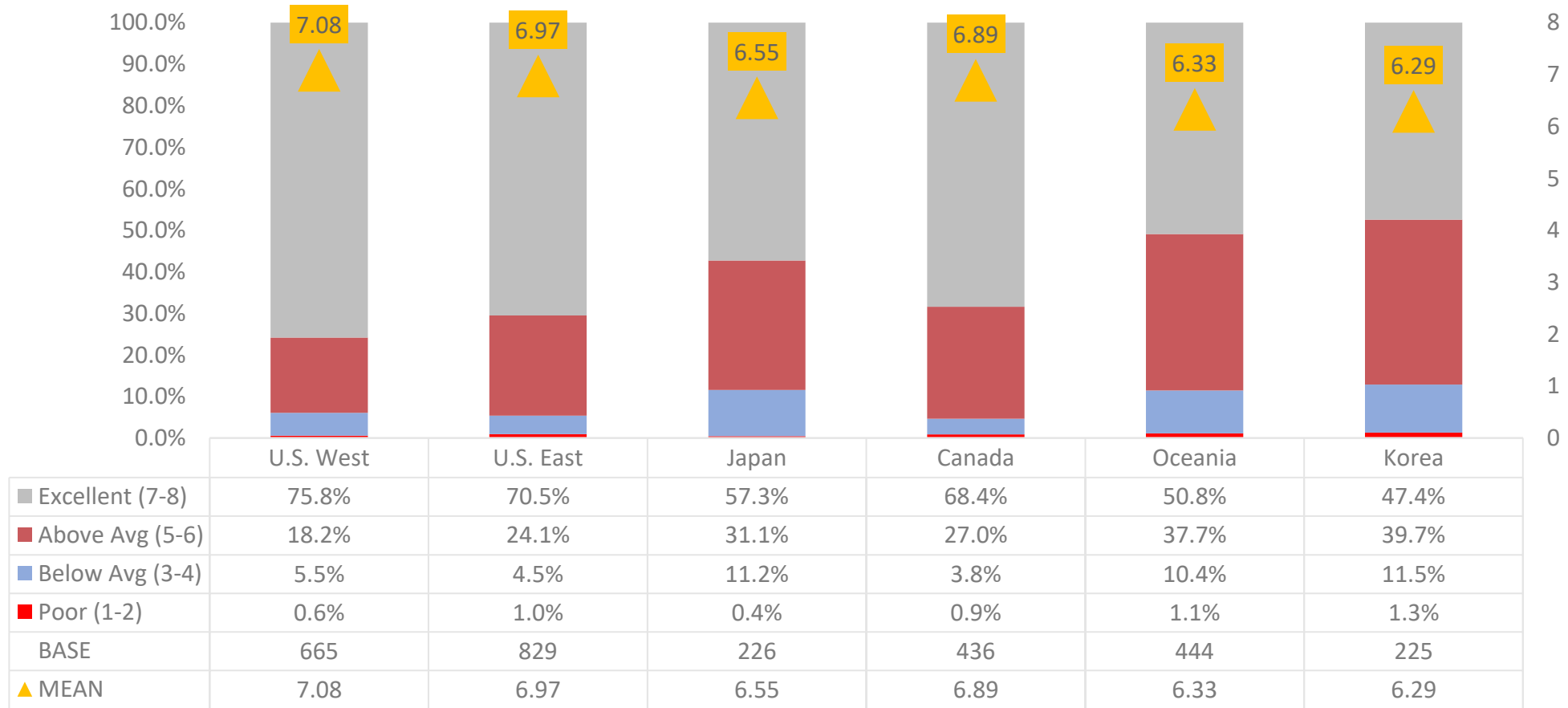
SHOPPING - O'AHU

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



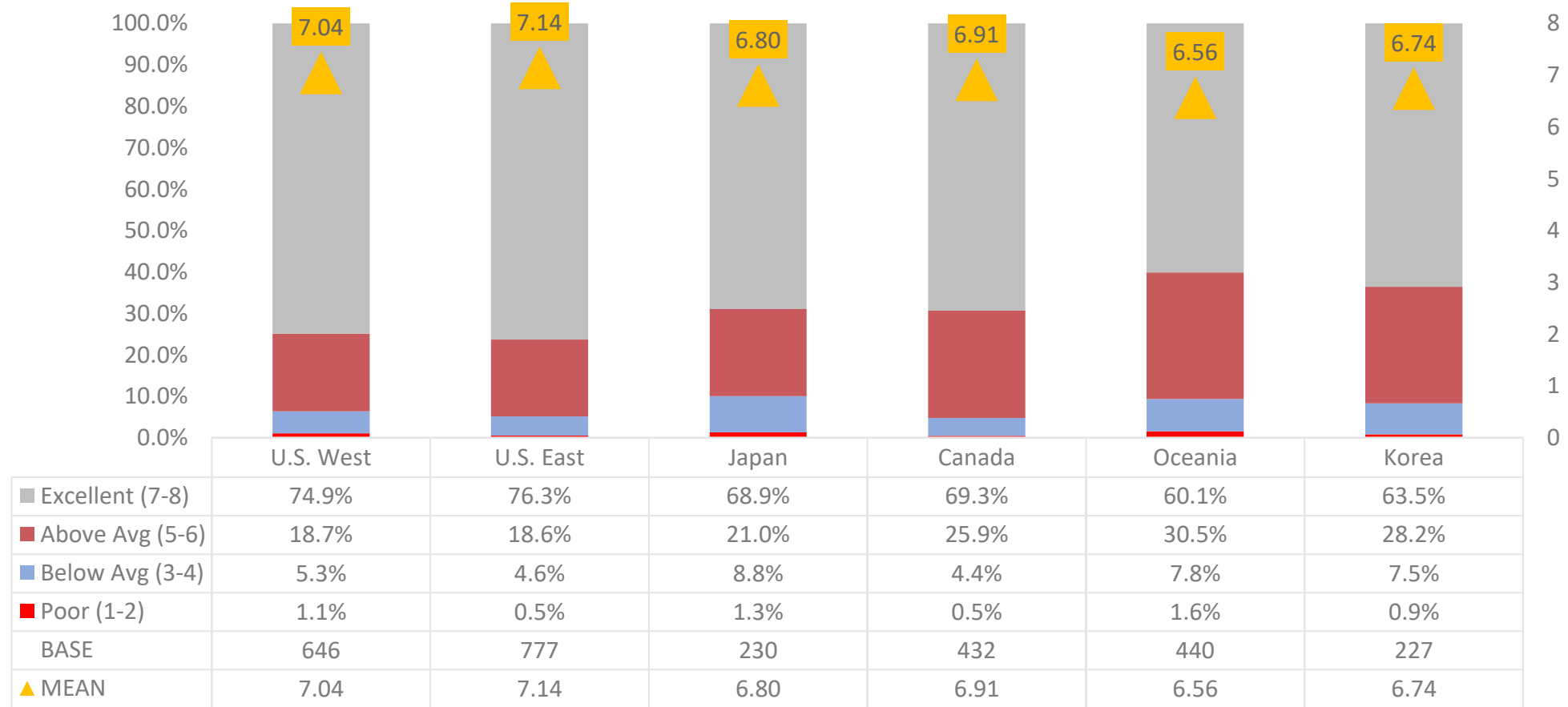
DINING/ FOOD & BEVERAGES - O'AHU

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



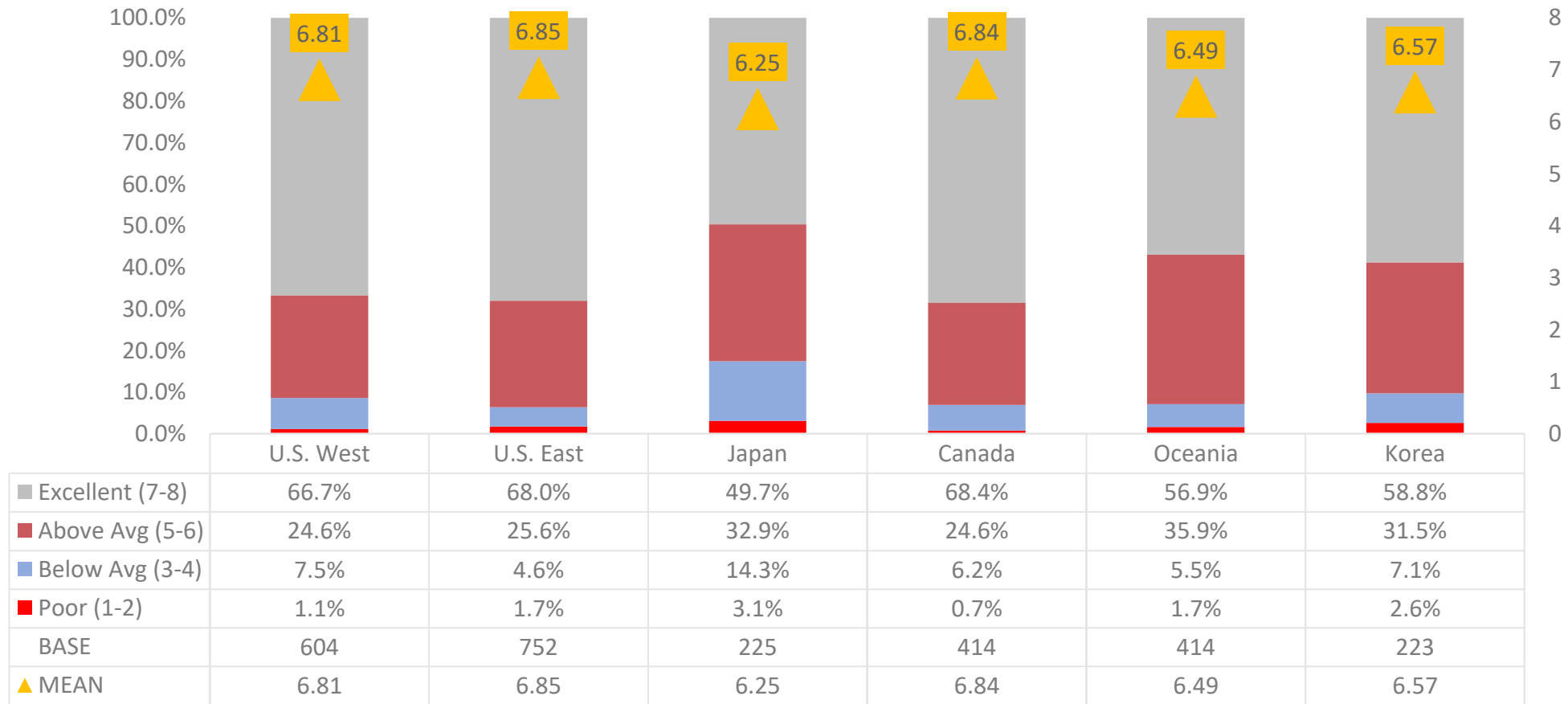
LODGING/ ACOMMODATIONS - O‘AHU

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



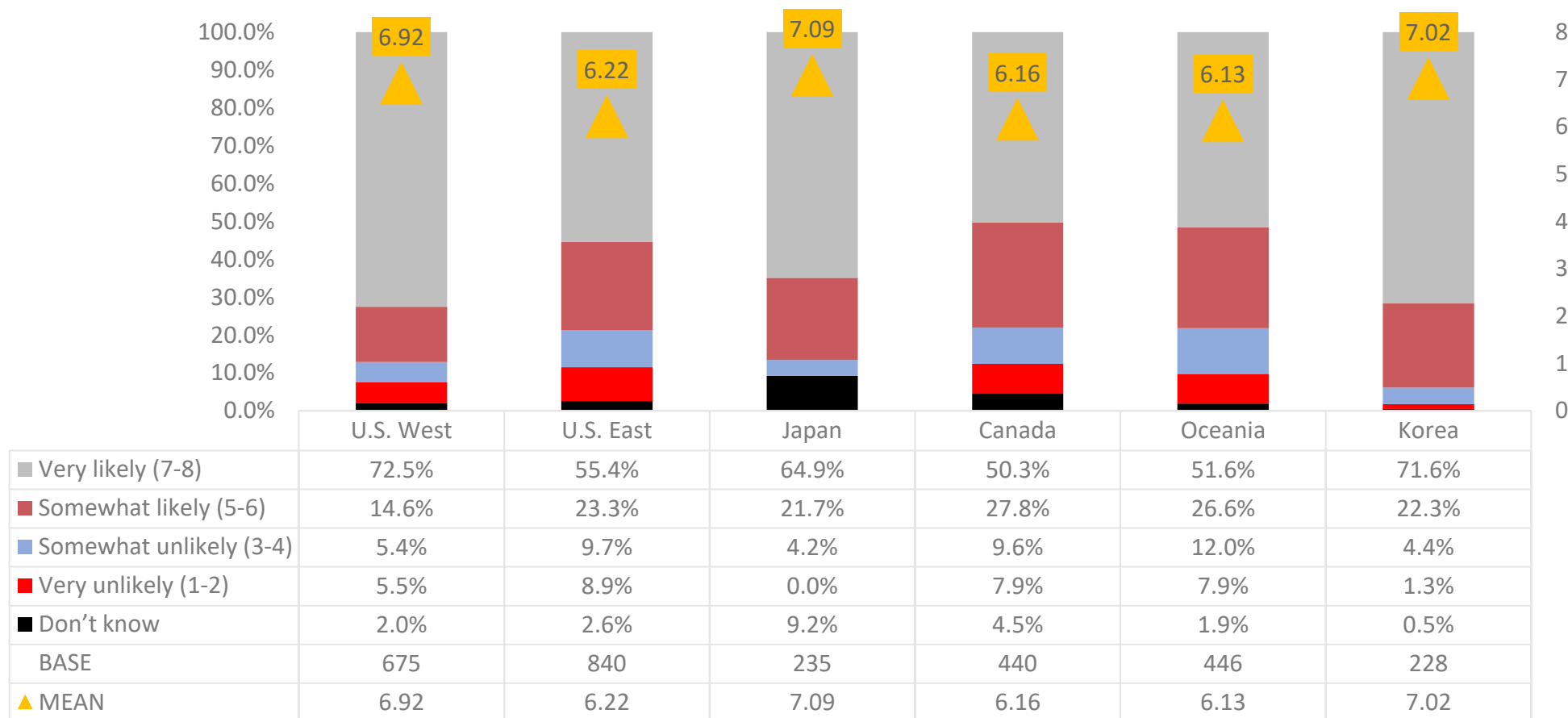
TRANSPORTATION ON ISLAND - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

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



LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

100.0%

80.0%

60.0%

40.0%

20.0%

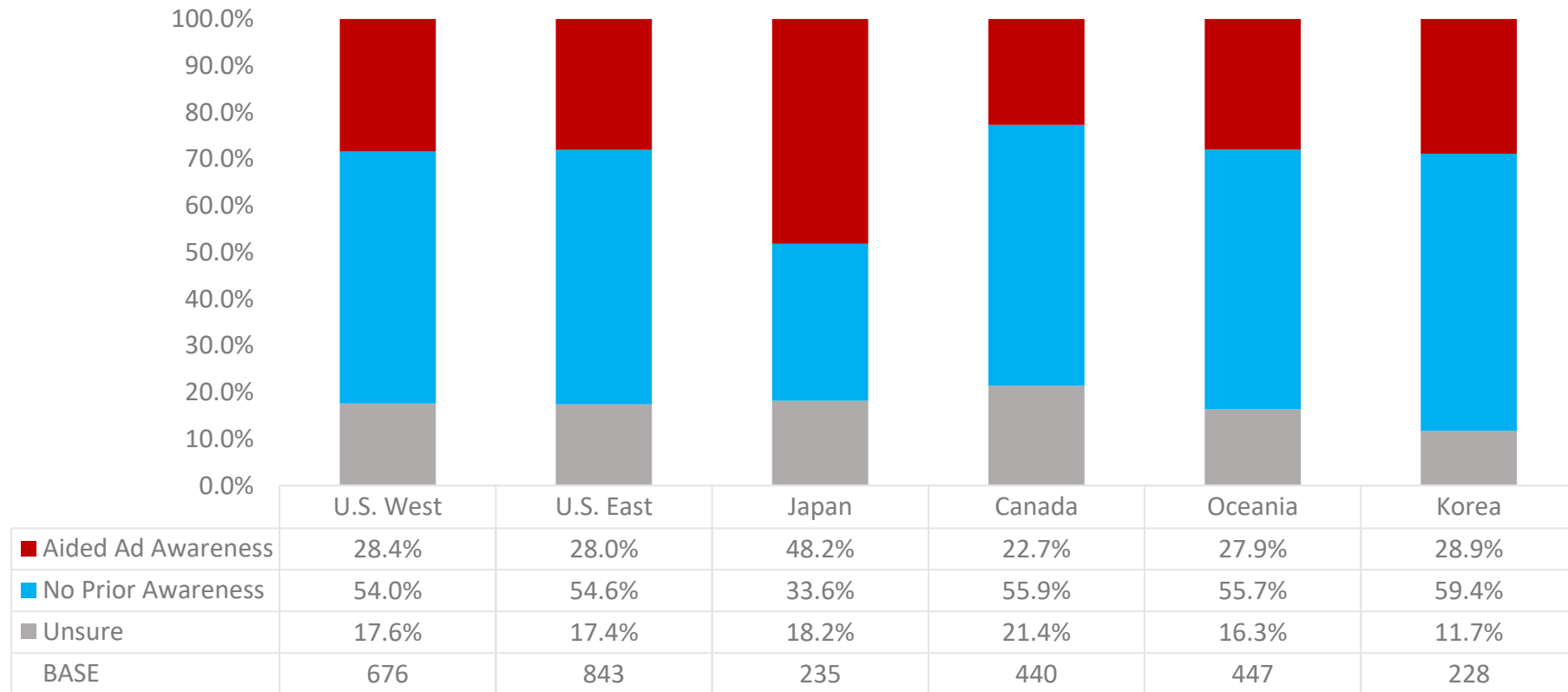
0.0%

	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	67.3%	66.1%	75.6%	68.8%	71.3%	72.5%
U.S. East	51.8%	52.7%	70.8%	56.5%	52.2%	55.4%
Japan	61.6%	63.6%			78.6%	64.9%
Canada	51.2%	51.5%			56.5%	50.3%
Oceania	53.5%	54.0%			57.6%	51.6%
Korea	59.9%	62.1%			69.2%	71.6%

Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

P= Preliminary Data

AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	39.6%	44.2%	38.3%	51.9%	36.2%	57.7%
Hawaiian cultural events	16.1%	14.2%	14.4%	20.9%	8.8%	4.4%
Outdoor or sporting activities and events	15.0%	11.0%	13.6%	19.1%	7.5%	14.4%
Social media posts and videos	13.9%	15.1%	28.9%	21.5%	11.3%	19.0%
Hawaiian music	8.2%	5.8%	15.0%	8.6%	6.6%	1.4%
Television programs or movies filmed in Hawai‘i	8.4%	14.8%	40.0%	15.9%	16.1%	16.3%
BASE	676	843	235	440	447	228

ATTRACTIONS – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Atlantis Submarine & Cruises	2.3%	3.4%	1.7%	3.3%	2.2%	4.0%
Bernice P. Bishop Museum	4.6%	4.5%	4.3%	4.4%	1.3%	1.4%
Byodo-In Temple	9.9%	15.0%	1.7%	19.4%	4.6%	1.3%
Chinatown & Honolulu Art District	12.2%	10.5%	9.8%	11.9%	3.9%	4.0%
Diamond Head State Monument	22.4%	30.7%	24.2%	45.0%	23.7%	44.1%
Dole Plantation	31.8%	40.1%	9.8%	43.3%	18.6%	41.5%
Foster Botanical Garden	2.4%	3.2%	1.3%	5.7%	2.0%	2.2%
Hale‘iwa	21.3%	19.9%	20.1%	27.2%	8.4%	8.4%
Hanauma Bay Nature Reserve	11.1%	10.7%	6.9%	21.9%	5.3%	25.8%
Harold L. Lyon Arboretum	0.3%	0.8%	0.4%	1.4%	0.0%	0.0%
Hawai‘i State Art Museum	1.3%	0.1%	2.2%	0.5%	1.4%	0.0%
Honolulu Museum of Art	1.9%	1.9%	4.3%	2.7%	2.5%	2.2%
Hawaiian Mission Houses, Historic Site and Archive	1.5%	1.1%	1.3%	1.0%	0.9%	0.9%
Hawai‘i’s Plantation Village	2.1%	2.5%	2.2%	2.7%	1.9%	2.6%
Honolulu Zoo	4.9%	7.6%	4.7%	7.4%	6.3%	8.9%

ATTRACTIONS - O'AHU

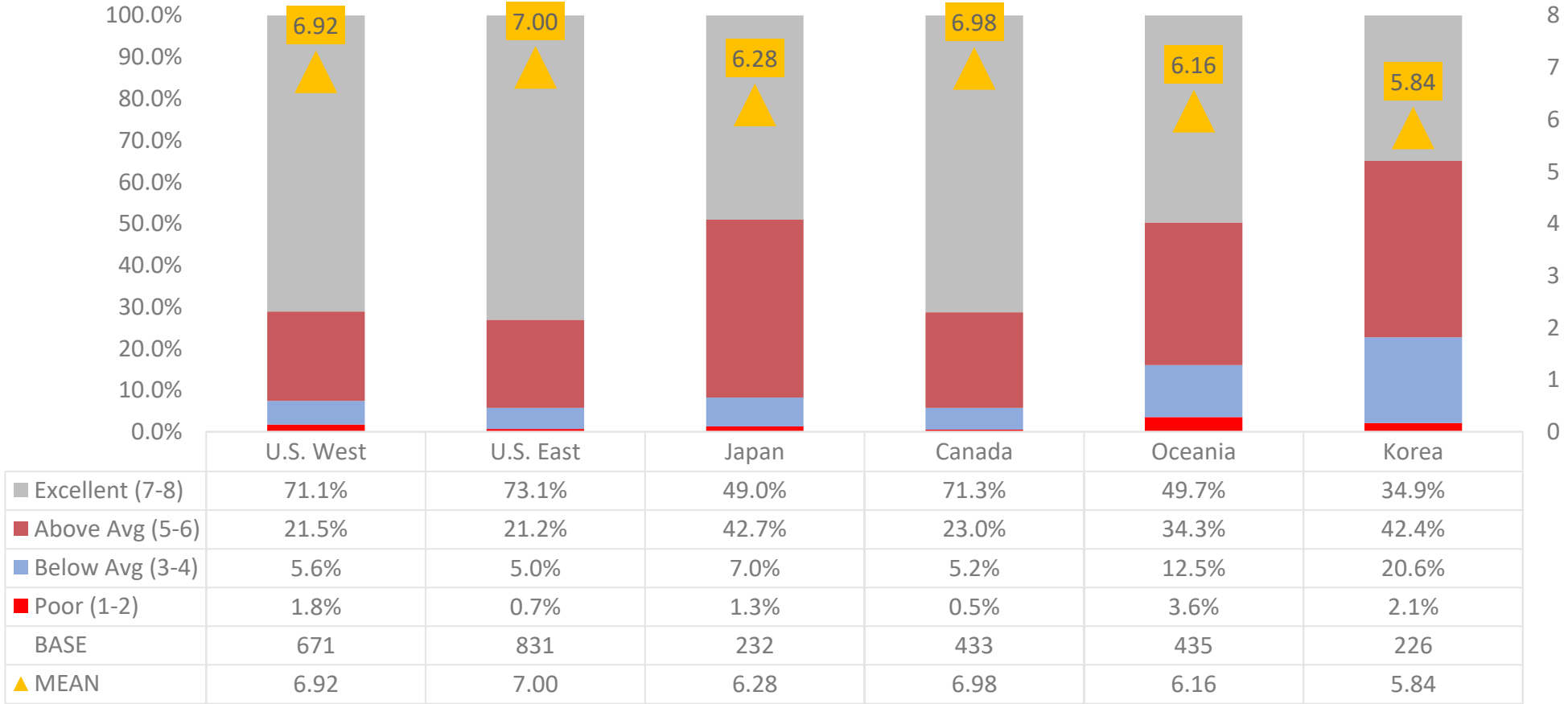
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Ho'omaluhia Botanical Garden	6.1%	7.7%	1.3%	10.3%	3.7%	7.1%
'Iolani Palace State Monument	5.7%	7.0%	3.9%	8.8%	4.0%	15.0%
Kailua Town	15.7%	13.4%	15.0%	13.9%	5.5%	7.6%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	6.0%	6.2%	2.6%	8.9%	1.8%	1.8%
Kaka'ako Street Art	3.1%	1.9%	15.0%	3.0%	0.2%	5.8%
Koko Head Crater Trail	4.8%	6.7%	5.2%	10.8%	3.2%	7.0%
Kualoa Private Nature Reserve	14.5%	15.2%	5.6%	22.5%	8.9%	16.1%
Lanikai or Kailua Beach	28.0%	26.9%	30.3%	35.3%	11.6%	31.0%
Mānoa Falls & Trail	11.5%	13.4%	5.2%	17.1%	4.3%	1.7%
National Memorial Cemetery of the Pacific	7.6%	12.3%	3.9%	7.7%	5.9%	3.5%
Nu'uuanu Pali Lookout	10.2%	14.5%	3.4%	13.9%	4.6%	4.9%
North Shore Beaches	44.7%	47.7%	17.6%	55.1%	24.4%	27.1%

ATTRACTIONS - O'AHU

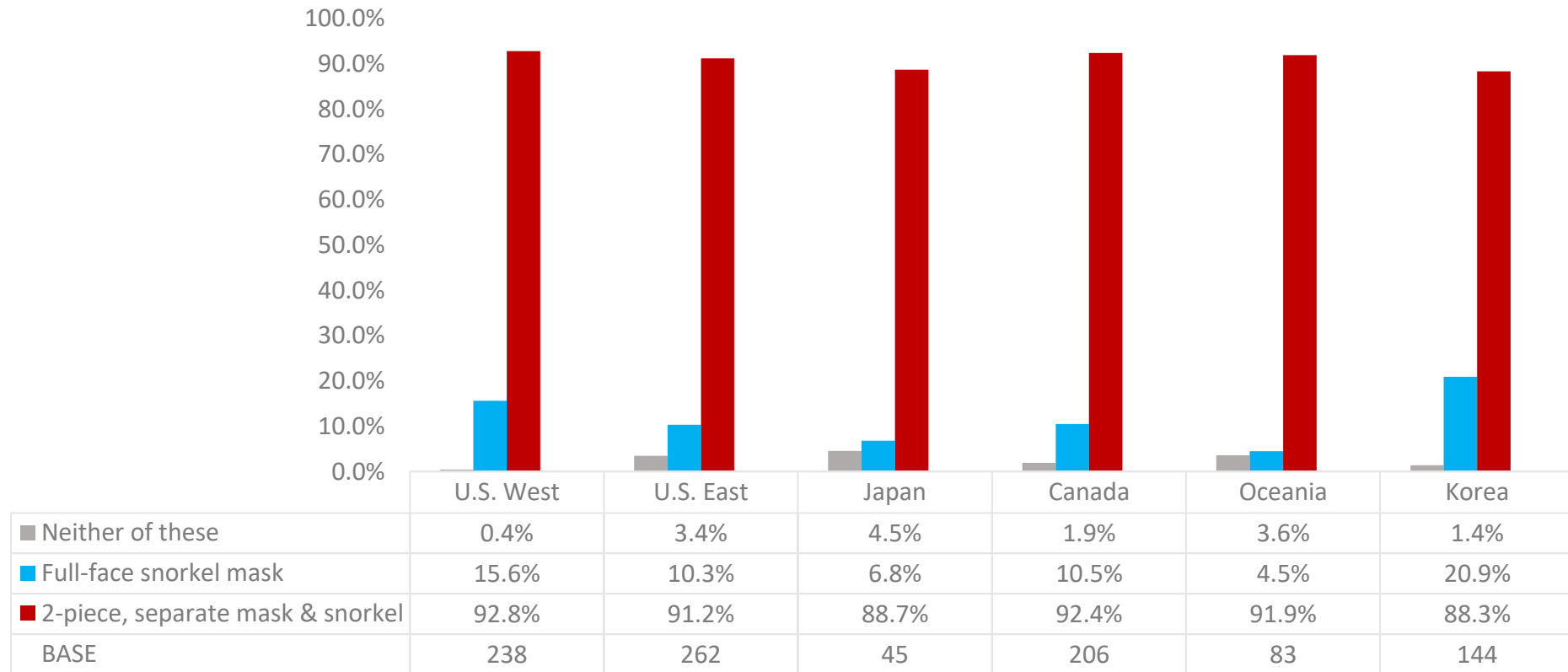
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Pearl Harbor National Memorial	31.3%	52.4%	5.6%	42.1%	38.1%	10.2%
Battleship Missouri Memorial	9.5%	20.3%	5.6%	18.7%	20.0%	6.7%
Pearl Harbor Aviation Museum	8.4%	17.3%	4.7%	16.6%	16.8%	4.0%
Pacific Fleet Submarine Museum	4.7%	7.1%	1.3%	9.7%	6.7%	1.7%
Polynesian Cultural Center	14.2%	15.8%	2.1%	19.4%	5.5%	8.7%
Queen Emma's Summer Palace	2.2%	2.3%	0.9%	0.4%	1.8%	0.9%
Sea Life Park Hawai'i	2.4%	3.1%	2.1%	5.2%	2.1%	2.8%
Waikiki Aquarium	4.6%	4.4%	5.2%	5.4%	3.3%	0.9%
Waimanalo Beach Park	14.4%	9.1%	6.4%	14.9%	4.0%	7.9%
Waimea Valley	18.2%	21.3%	3.0%	26.9%	8.7%	7.5%

DANIEL K. INOUE INTERNATIONAL AIRPORT

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



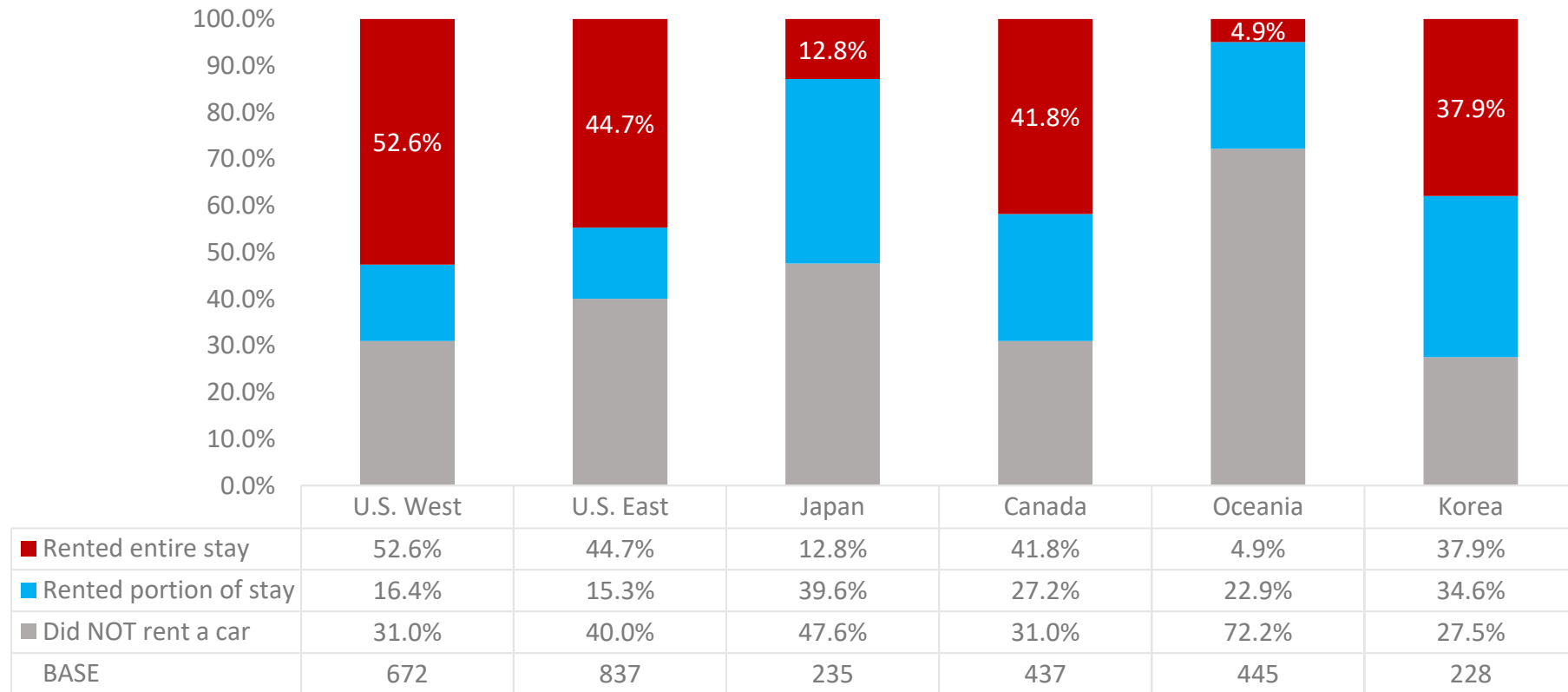
SNORKELING EQUIPMENT USED - O‘AHU



SNORKELING OCEAN SAFETY - O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	97.1%	98.4%	93.0%	97.4%	100.0%	96.6%
Yes, needed assistance – using 2-piece mask & snorkel	2.9%	1.2%	4.6%	2.6%	0.0%	2.7%
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.4%	2.4%	0.0%	0.0%	0.7%
BASE	237	253	43	202	80	142

CAR RENTAL - O'AHU



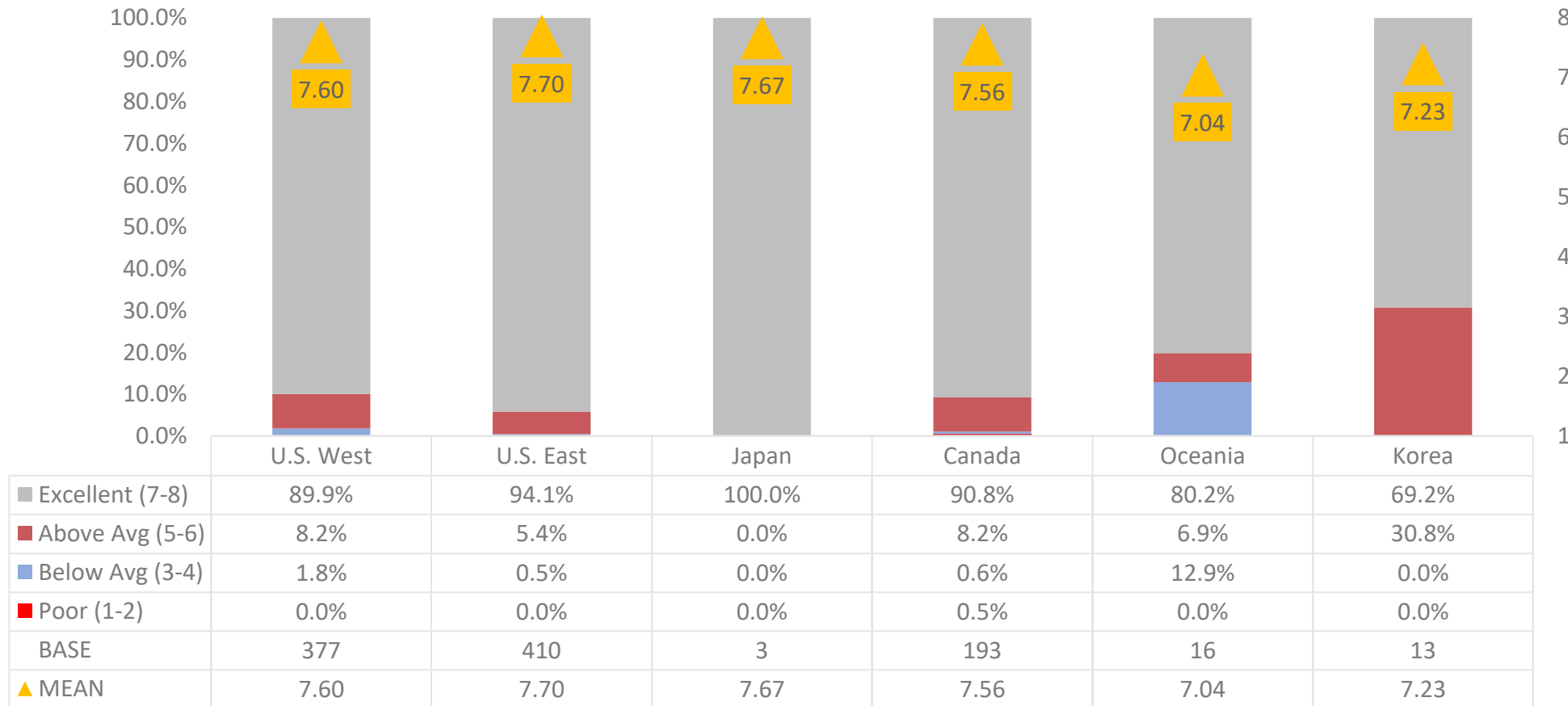
REASONS FOR PARTIAL RENTAL CAR – O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Parking was too expensive at my hotel/ lodging	37.2%	32.0%	9.8%	39.1%	31.6%	35.7%
Car rental rates were too expensive	20.7%	14.0%	22.6%	23.4%	24.5%	26.4%
I only needed a vehicle on certain dates	75.4%	74.2%	79.5%	81.2%	73.8%	60.3%
Vehicles were not available for all of my trip dates	3.8%	4.7%	5.4%	0.7%	5.6%	5.2%
BASE	110	128	93	119	101	79

Section 6 – Kauaʻi

SATISFACTION - KAUA'I

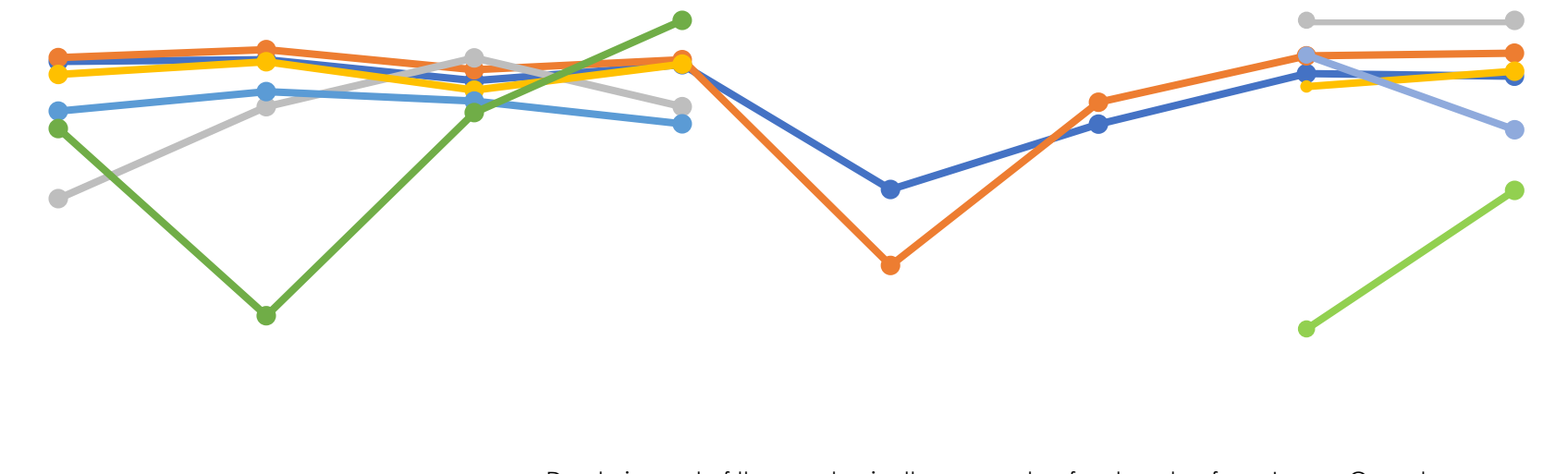
8-pt Rating Scale
8 = Excellent / 1 = Poor



SATISFACTION - KAUA'I

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

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



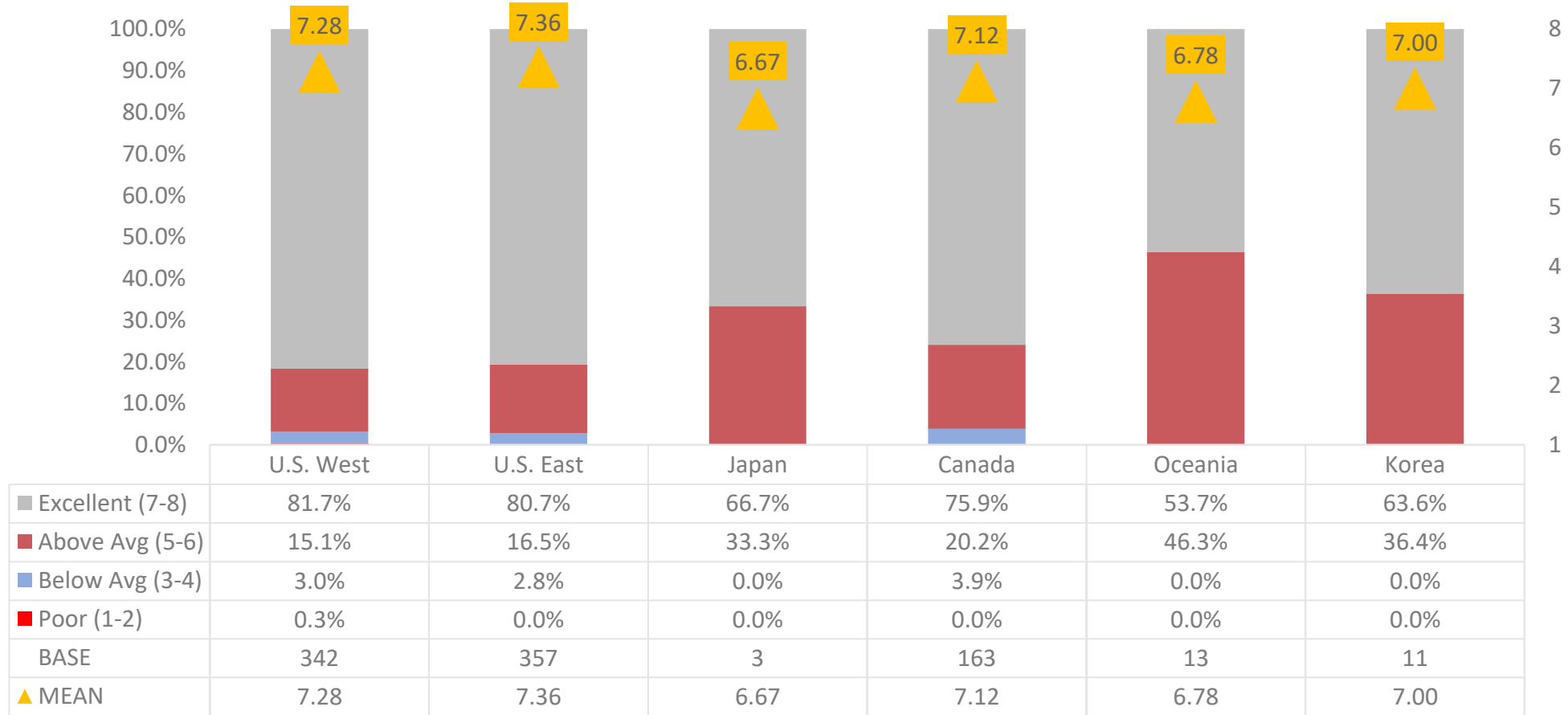
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	92.6%	92.9%	89.1%	92.0%	69.4%	81.2%	90.4%	89.9%
U.S. East	93.3%	94.7%	91.1%	92.9%	55.6%	85.2%	93.6%	94.1%
Japan	67.7%	84.4%	93.2%	84.4%			100.0%	100.0%
Canada	90.2%	92.5%	87.4%	92.1%			88.0%	90.8%
Oceania	83.6%	87.1%	85.4%	81.3%			93.7%	80.2%
Korea	80.4%	46.5%	83.3%	100.0%			44.1%	69.2%

P= Preliminary Data

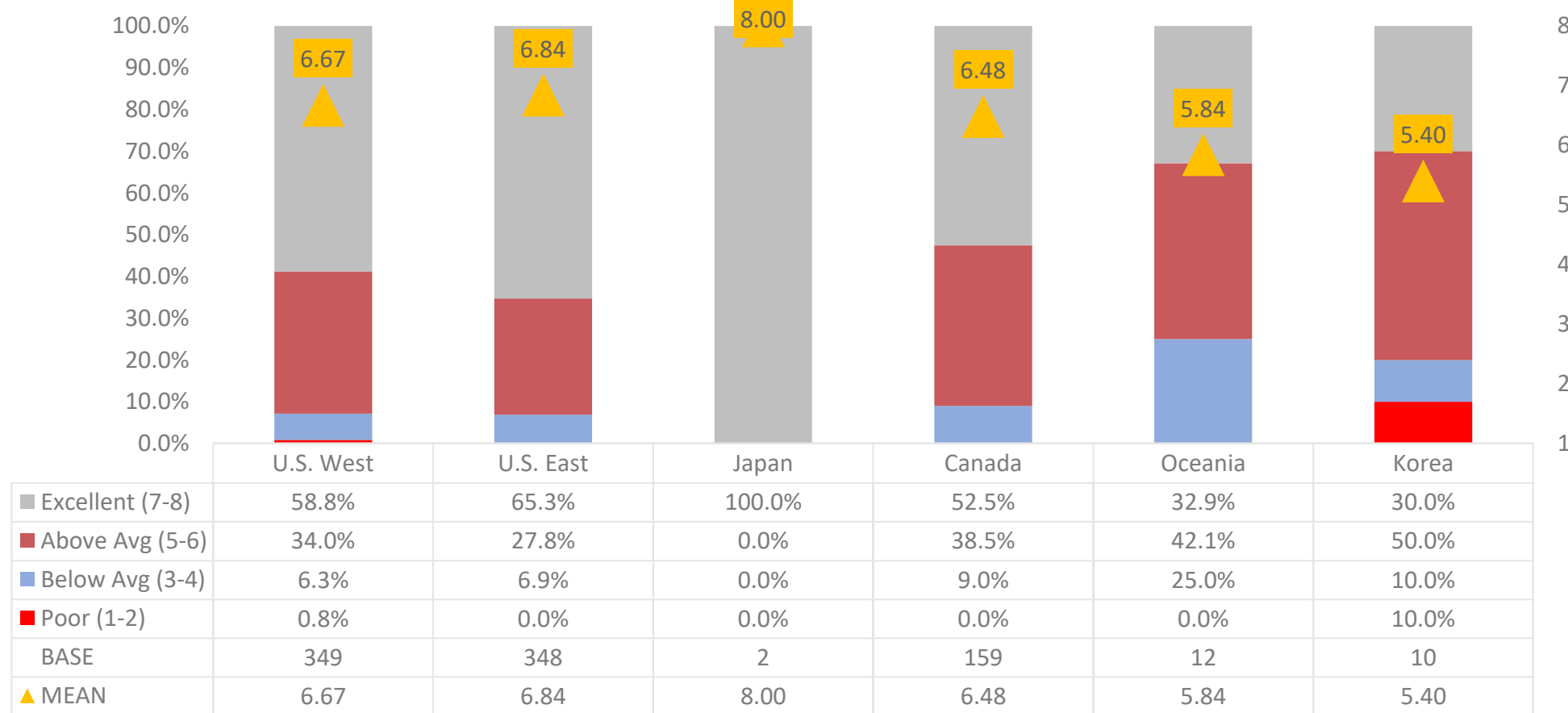
ENTERTAINMENT/ ATTRACTIONS – KAUAI

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



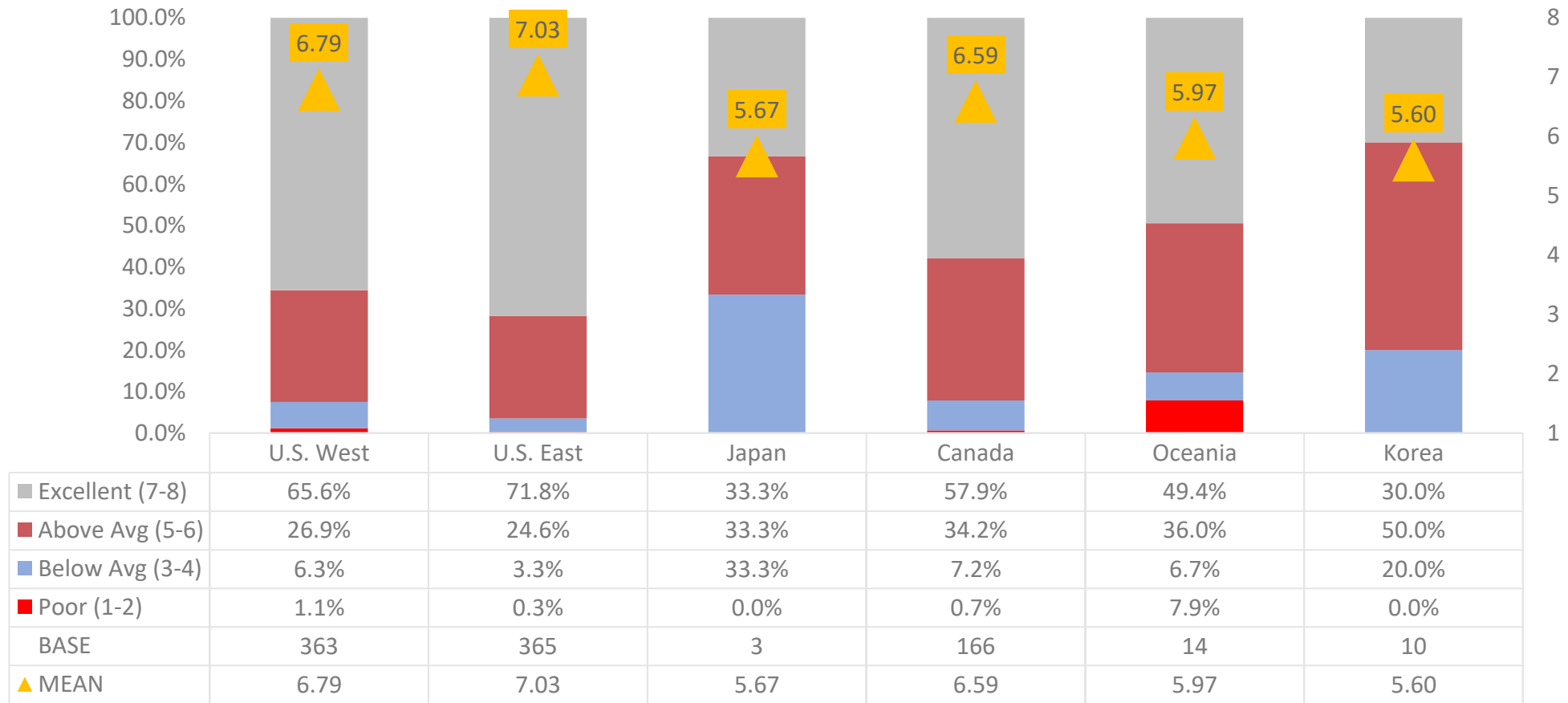
SHOPPING - KAUA'I

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



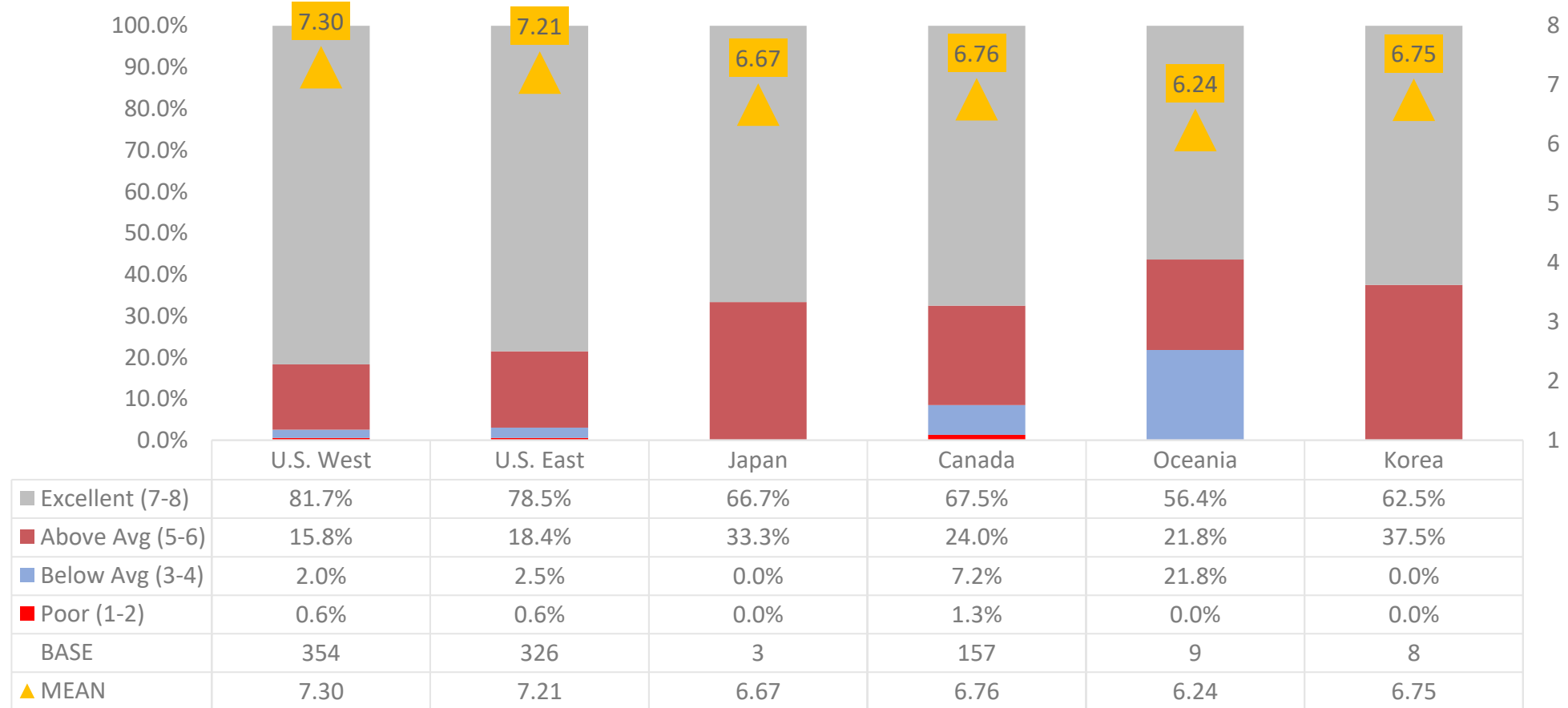
DINING/ FOOD & BEVERAGE - KAUA'I

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



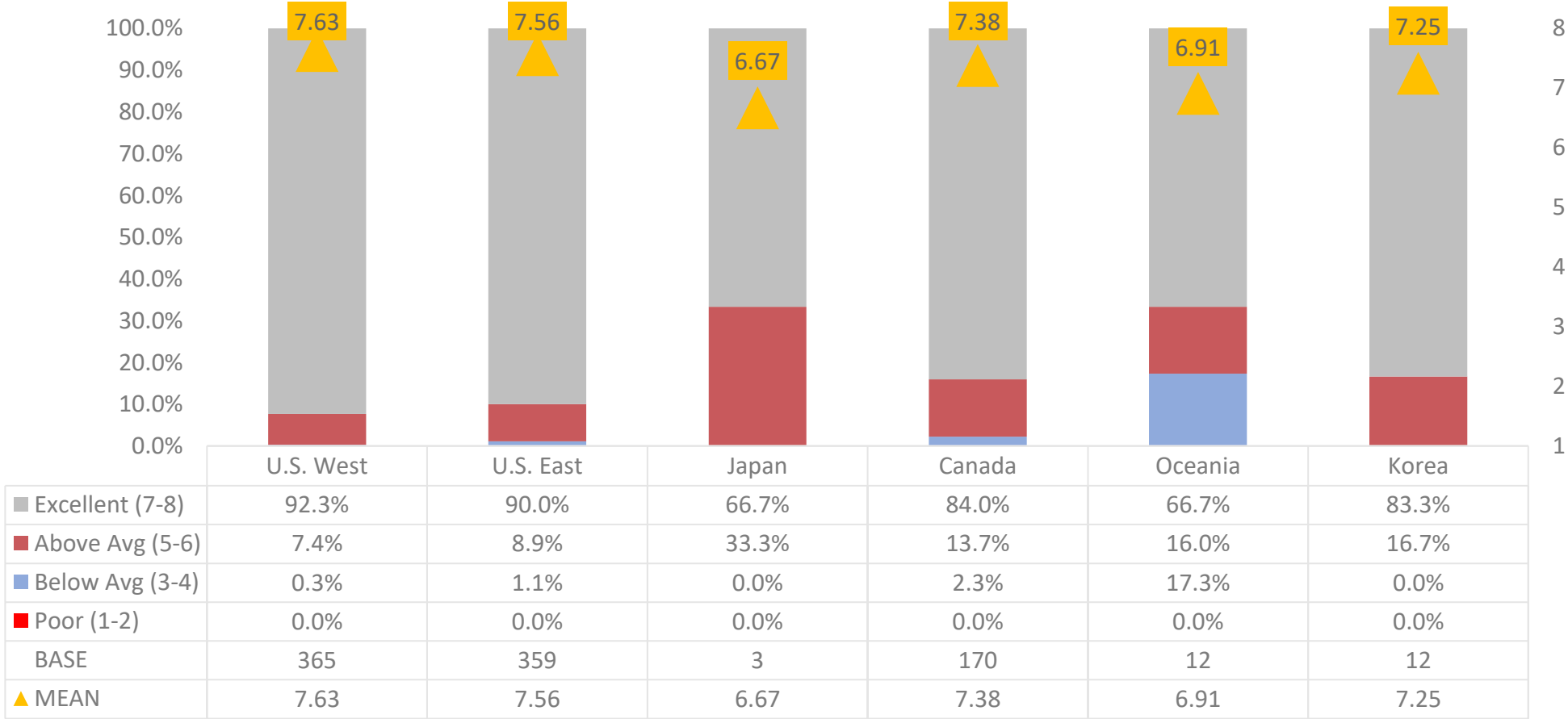
LODGING/ ACCOMMODATIONS – KAUA‘I

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



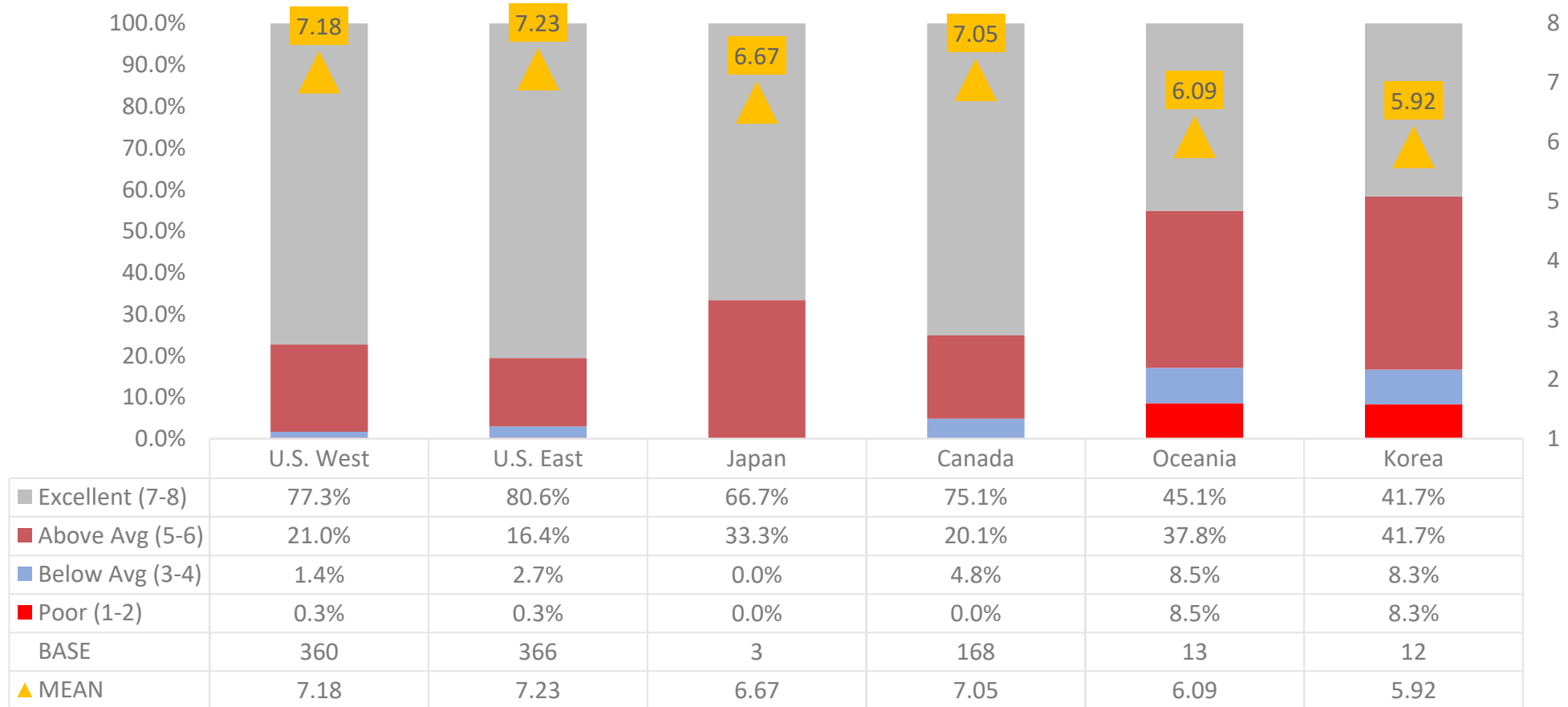
BEACHES - KAUA'I

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



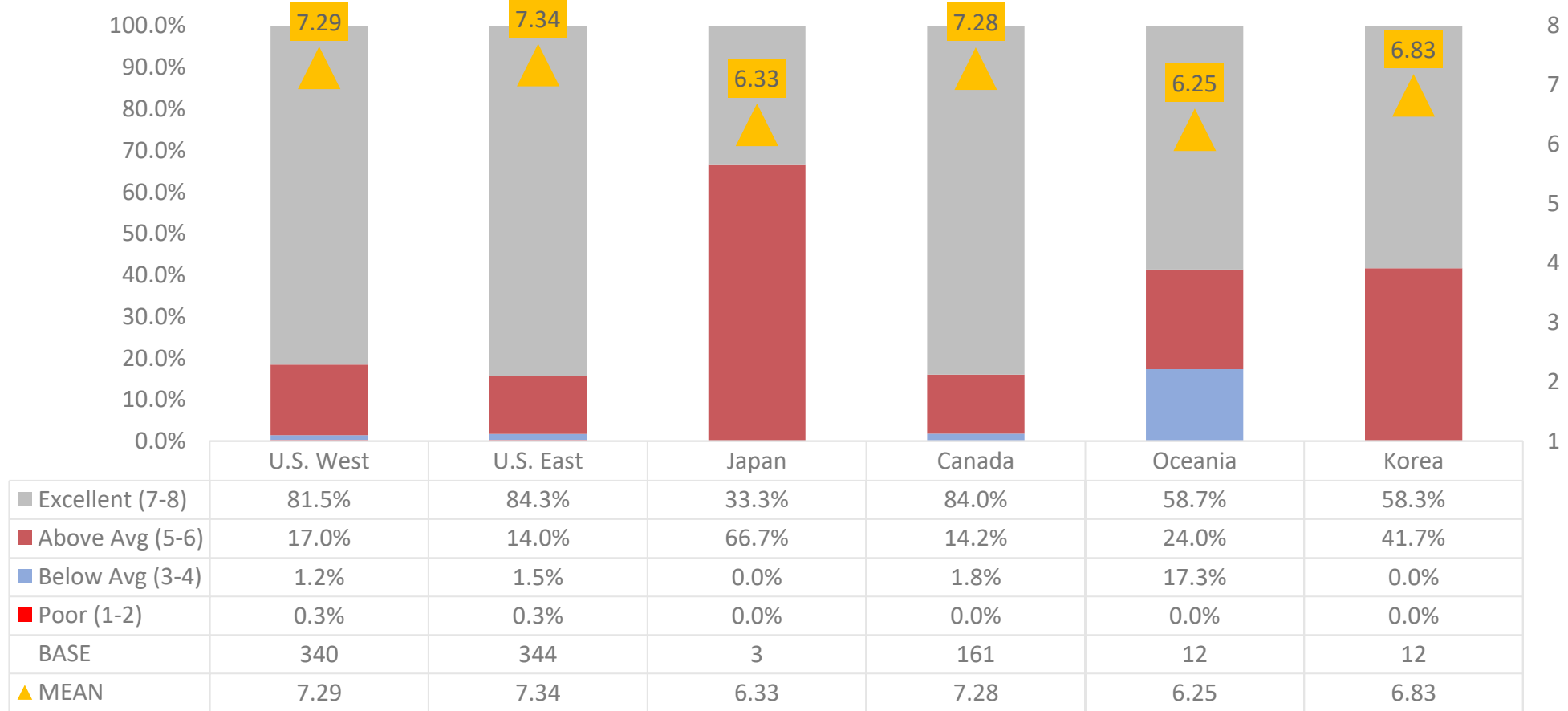
PUBLIC AREAS - KAUA'I

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



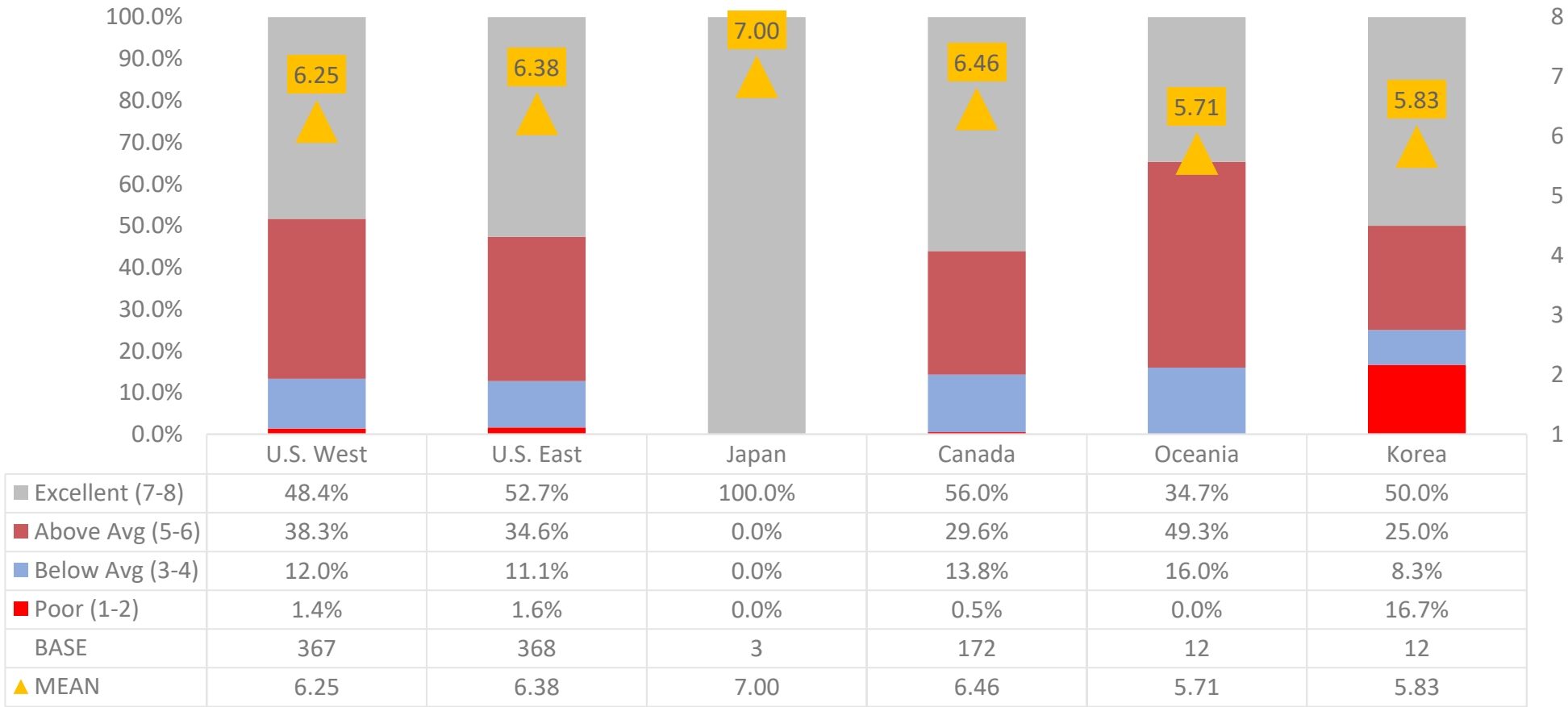
PARKS - KAUAI

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



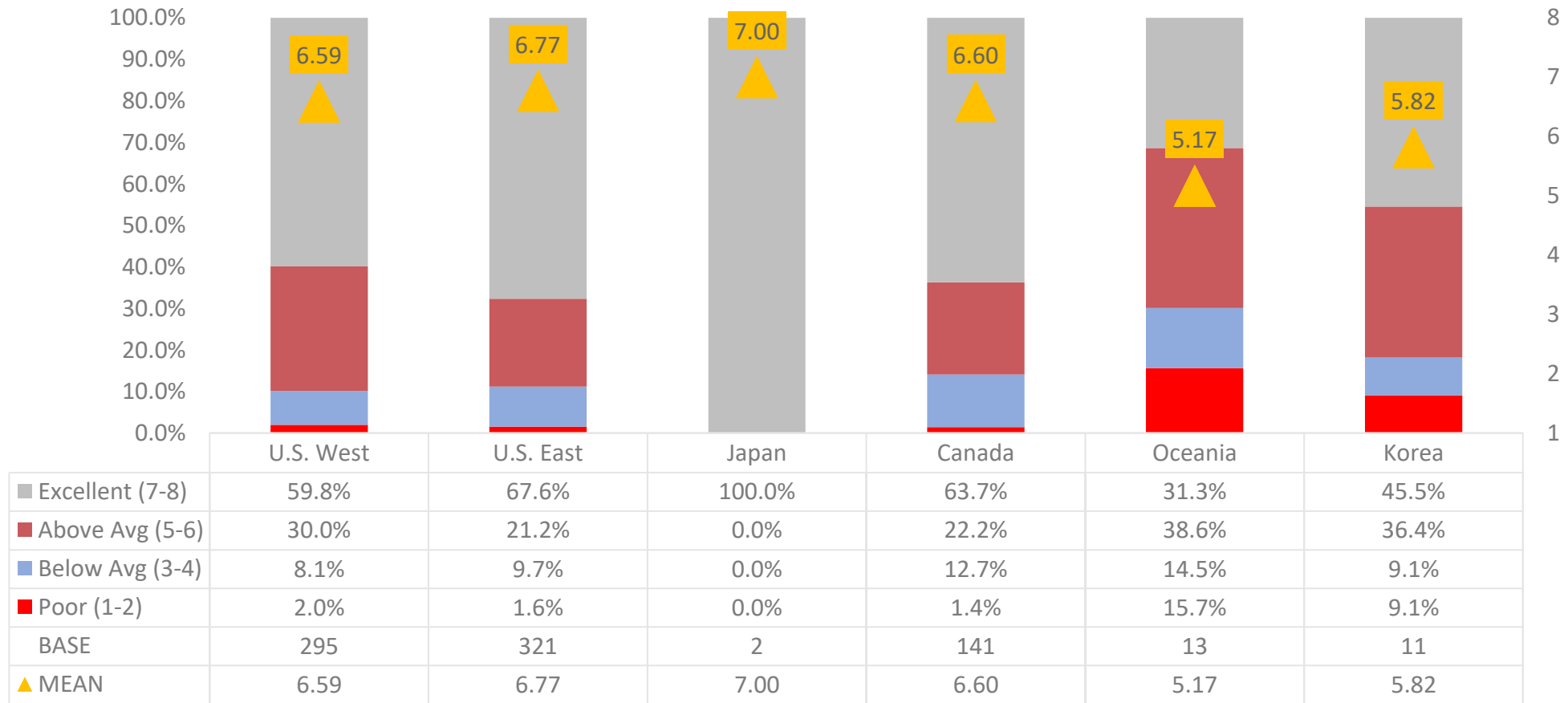
ROADS – KAUA‘I

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



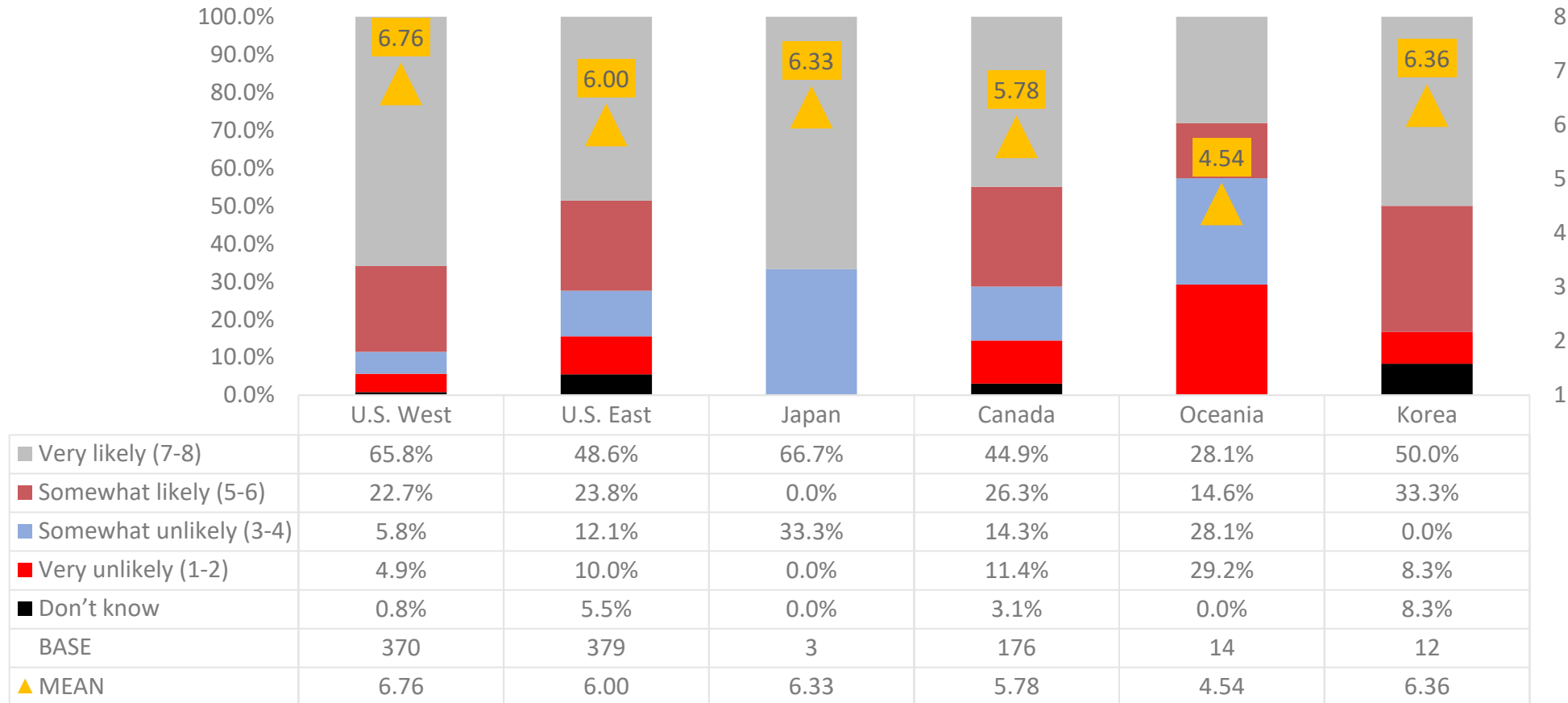
TRANSPORTATION ON ISLAND - KAUA'I

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



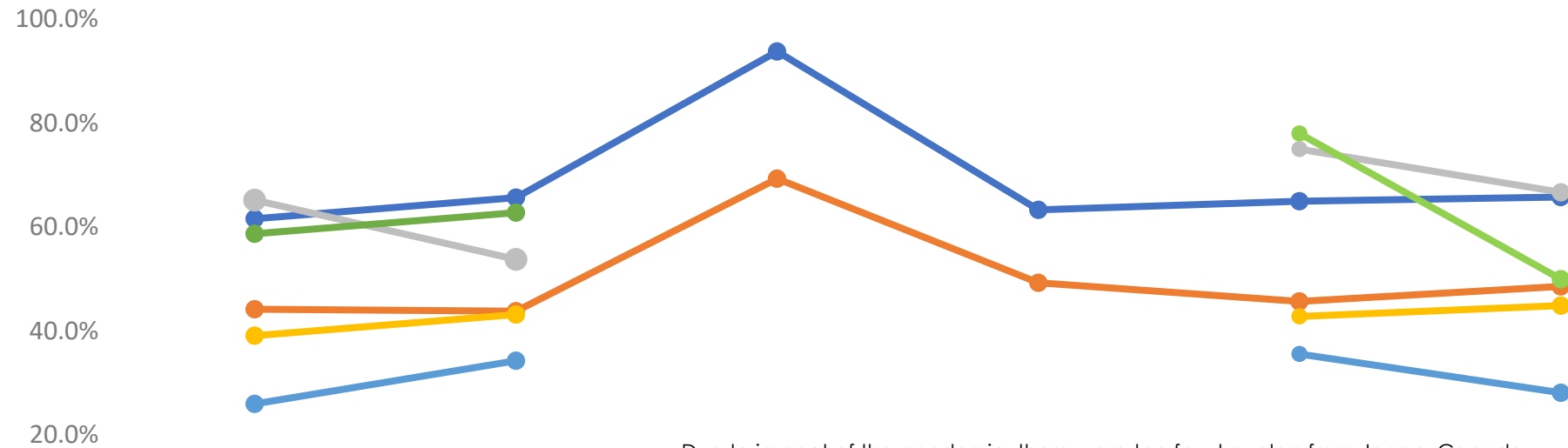
LIKELIHOOD OF RETURN VISIT – KAUA‘I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

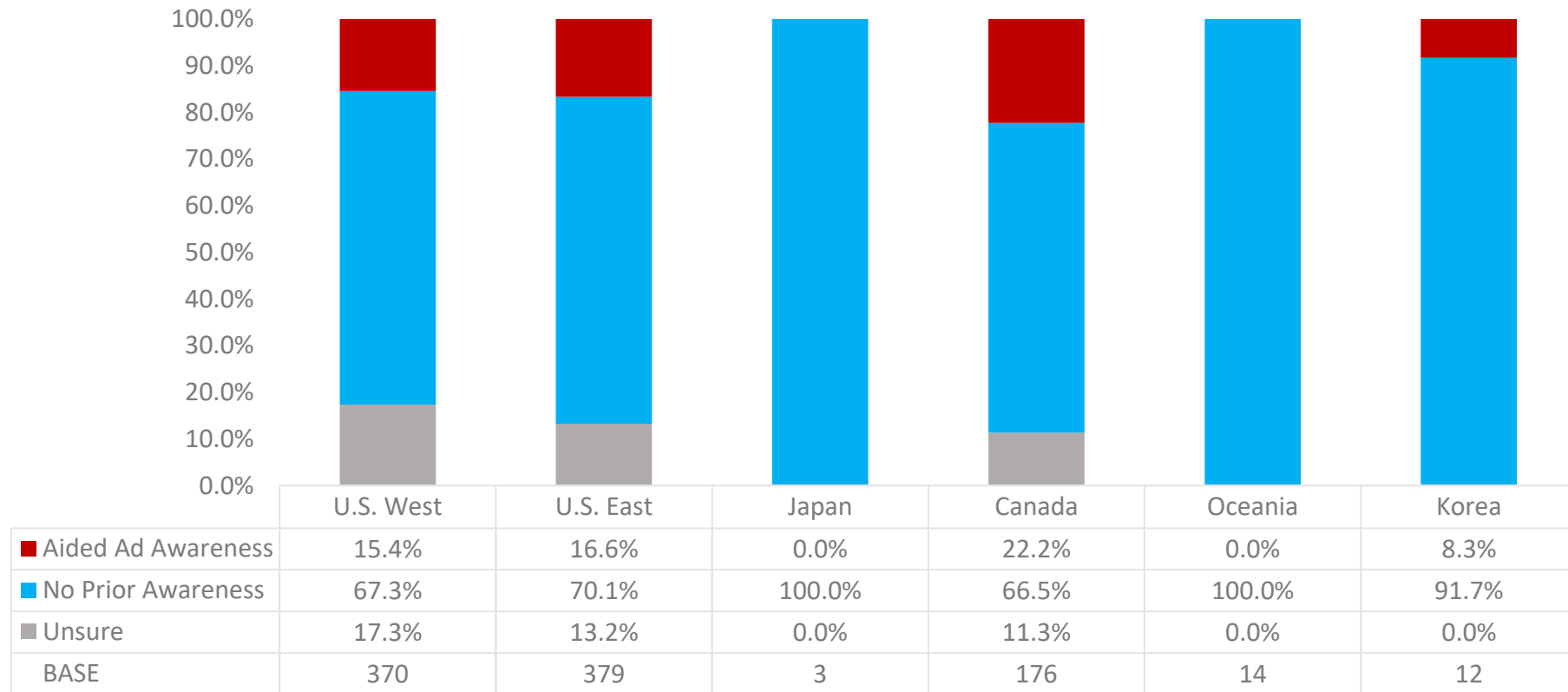


Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	61.6%	65.7%	93.8%	63.3%	65.0%	65.8%
U.S. East	44.2%	43.8%	69.3%	49.3%	45.7%	48.6%
Japan	65.2%	53.8%			75.0%	66.7%
Canada	39.1%	43.2%			42.8%	44.9%
Oceania	26.0%	34.3%			35.6%	28.1%
Korea	58.7%	62.8%			78.0%	50.0%

P= Preliminary Data

AIDED ADVERTISING AWARENESS - KAUA'I



MOTIVATING FACTORS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	44.1%	42.8%	66.7%	50.2%	34.8%	66.7%
Hawaiian cultural events	7.3%	9.0%	0.0%	7.4%	7.9%	0.0%
Outdoor or sporting activities and events	22.4%	17.2%	0.0%	21.4%	22.5%	0.0%
Social media posts and videos	7.6%	11.3%	0.0%	13.4%	7.9%	0.0%
Hawaiian music	4.9%	4.0%	0.0%	3.7%	0.0%	0.0%
Television programs or movies filmed in Hawai‘i	6.2%	6.6%	0.0%	9.6%	0.0%	8.3%
BASE	370	379	3	176	14	12

ATTRACTIONS – KAUAI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Fern Grotto	10.5%	11.3%	0.0%	10.6%	7.9%	0.0%
Hanalei Town	56.7%	51.3%	33.3%	63.4%	33.7%	0.0%
Hanalei Beach	55.4%	45.7%	33.3%	63.8%	27.0%	0.0%
Kalapaki Beach	21.7%	25.6%	0.0%	27.9%	13.5%	8.3%
Kalalau Trail	11.1%	14.8%	0.0%	24.5%	13.5%	8.3%
Bike Path in Kapa'a	7.2%	8.2%	0.0%	10.8%	0.0%	0.0%
Kaua'i Museum	4.1%	2.9%	0.0%	4.5%	0.0%	0.0%
Ke'e Beach	12.7%	12.4%	0.0%	24.4%	6.7%	16.7%
Kīlauea Lighthouse	25.2%	29.6%	33.3%	33.5%	6.7%	0.0%
Koke'e	7.9%	8.7%	0.0%	20.0%	13.5%	0.0%

ATTRACTIONS – KAUAI

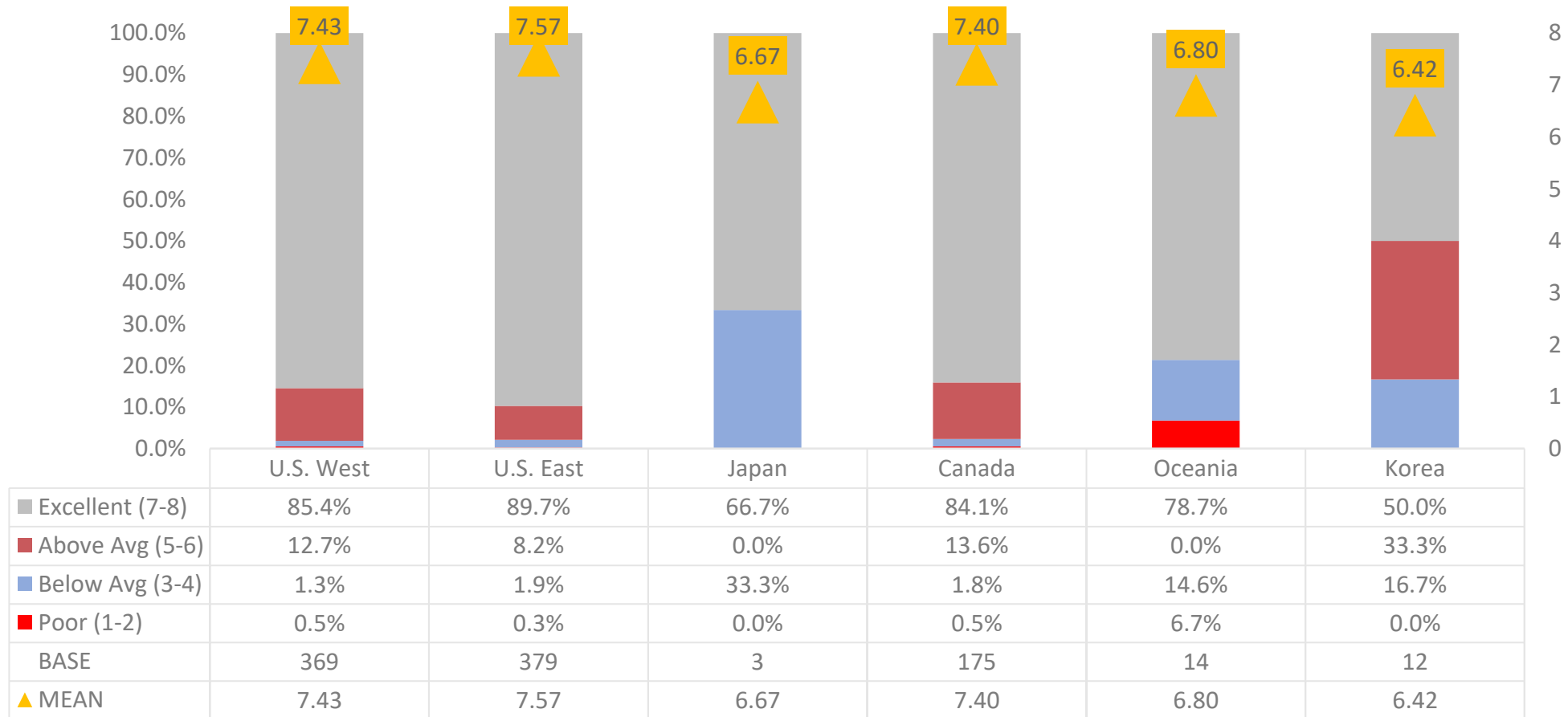
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Koke'e Museum	5.2%	3.4%	0.0%	6.7%	0.0%	0.0%
Na 'Āina Kai Gardens	0.8%	1.1%	0.0%	2.2%	0.0%	0.0%
Nāpali Coast	39.4%	57.0%	0.0%	57.2%	48.3%	0.0%
Allerton Garden	6.2%	10.1%	0.0%	8.2%	7.9%	8.3%
Līmahuli Garden	3.8%	5.3%	0.0%	8.8%	7.9%	0.0%
Old Kōloa Town	43.4%	34.4%	33.3%	37.3%	33.7%	0.0%
'Ōpaeka'a Falls	20.5%	25.1%	33.3%	26.7%	14.6%	8.3%
Po'ipū Beach	69.3%	63.4%	66.7%	65.6%	48.3%	41.7%
Smith's Tropical Paradise Gardens	9.8%	10.0%	0.0%	6.4%	0.0%	0.0%
Spouting Horn	31.6%	36.7%	33.3%	37.5%	34.8%	16.7%
Wailua Falls	37.9%	43.3%	0.0%	44.6%	27.0%	25.0%

ATTRACTIONS – KAUUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Wailua River	26.0%	20.8%	0.0%	25.0%	21.3%	0.0%
Waimea Canyon	51.4%	62.3%	100.0%	66.8%	55.1%	50.0%
Disc Golf	1.4%	0.5%	0.0%	1.6%	0.0%	0.0%
Mini Golf	3.0%	2.1%	0.0%	1.7%	0.0%	0.0%

FRIENDLINESS OF KAUA'I RESIDENTS

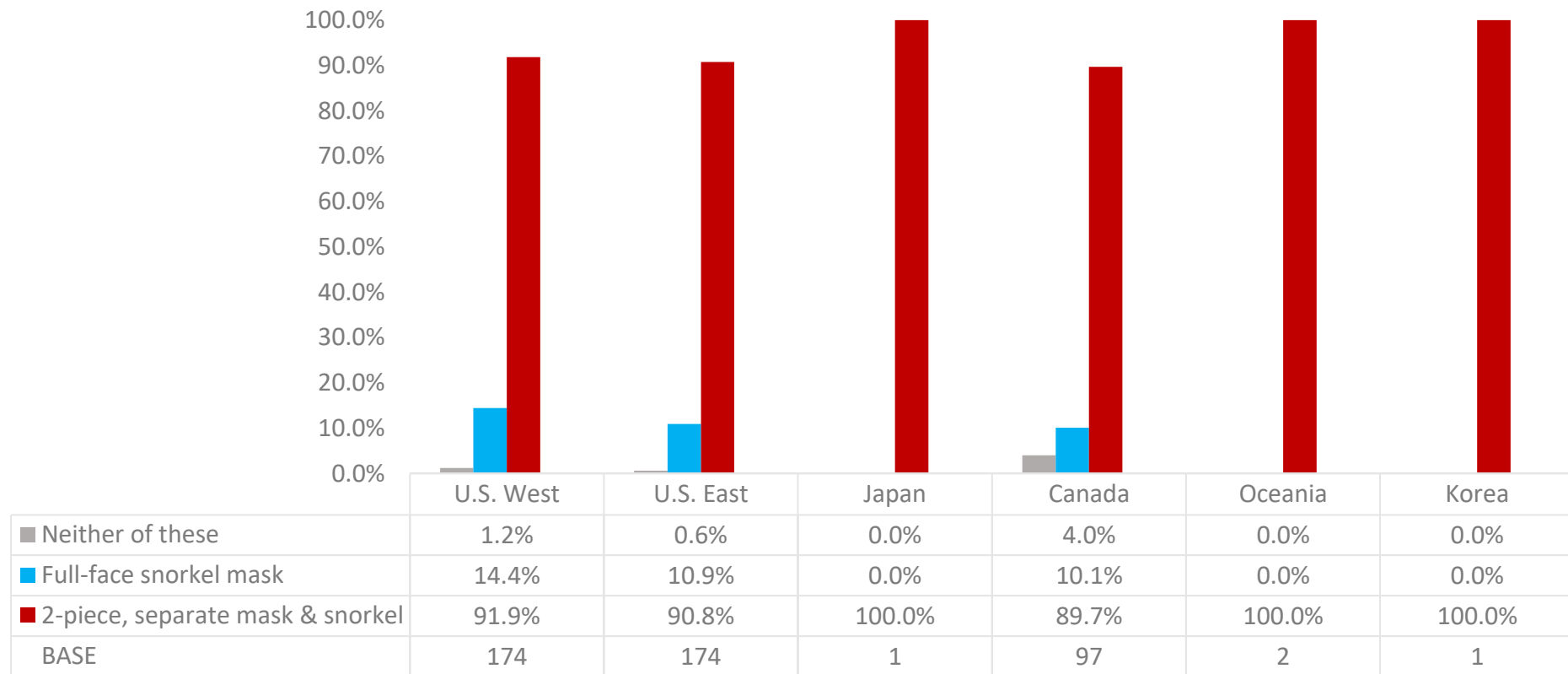
8-pt Rating Scale
8=Excellent/ 1=Poor



TOP TRIP INFLUENCERS – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Been here before	43.6%	27.9%	0.0%	19.4%	40.5%	0.0%
Friend recommendation	27.5%	24.4%	66.7%	28.5%	13.5%	0.0%
Cruise line stop/ part of tour	1.6%	11.8%	0.0%	11.2%	23.6%	0.0%
Visiting Family/ Friends	5.1%	4.0%	0.0%	1.2%	0.0%	0.0%
Attending Conference/ Event	1.9%	4.2%	0.0%	1.6%	0.0%	0.0%
Own a timeshare	3.3%	1.3%	0.0%	1.0%	0.0%	0.0%
Maui wildfires	1.9%	3.1%	0.0%	4.0%	0.0%	0.0%
Location/ Never been, but went to other islands	1.9%	3.2%	0.0%	3.6%	0.0%	0.0%
Article/ Blog	1.9%	2.4%	0.0%	9.0%	6.7%	25.0%
Social Media Post	1.4%	3.4%	0.0%	6.4%	0.0%	8.3%
Nature/ Beauty/ Scenery	1.6%	2.6%	33.3%	3.0%	0.0%	0.0%

SNORKELING EQUIPMENT USED - KAUA'I



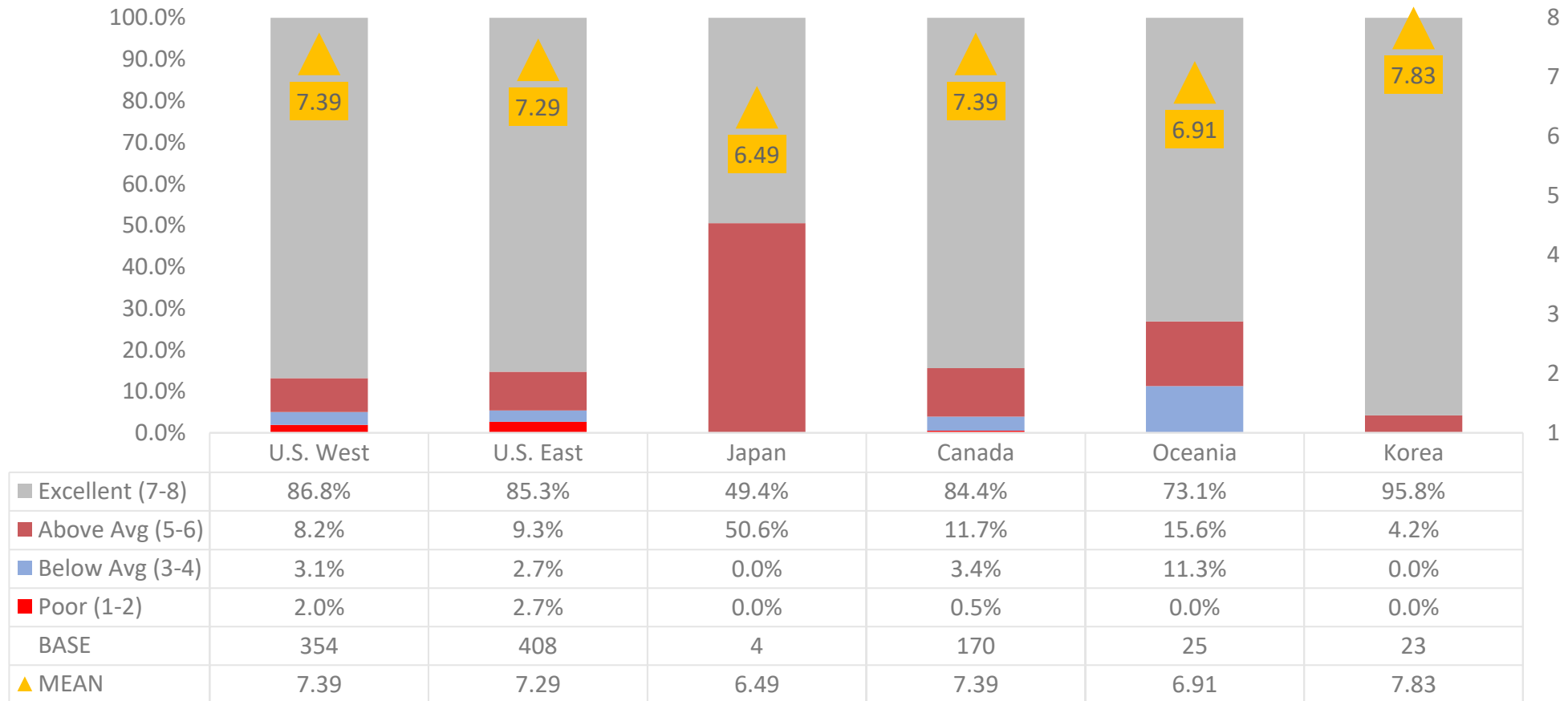
SNORKELING OCEAN SAFETY – KAUA‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	99.4%	99.4%	100.0%	100.0%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.6%	0.6%	0.0%	0.0%	0.0%	0.0%
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	172	173	1	93	2	1

Section 7 – Maui

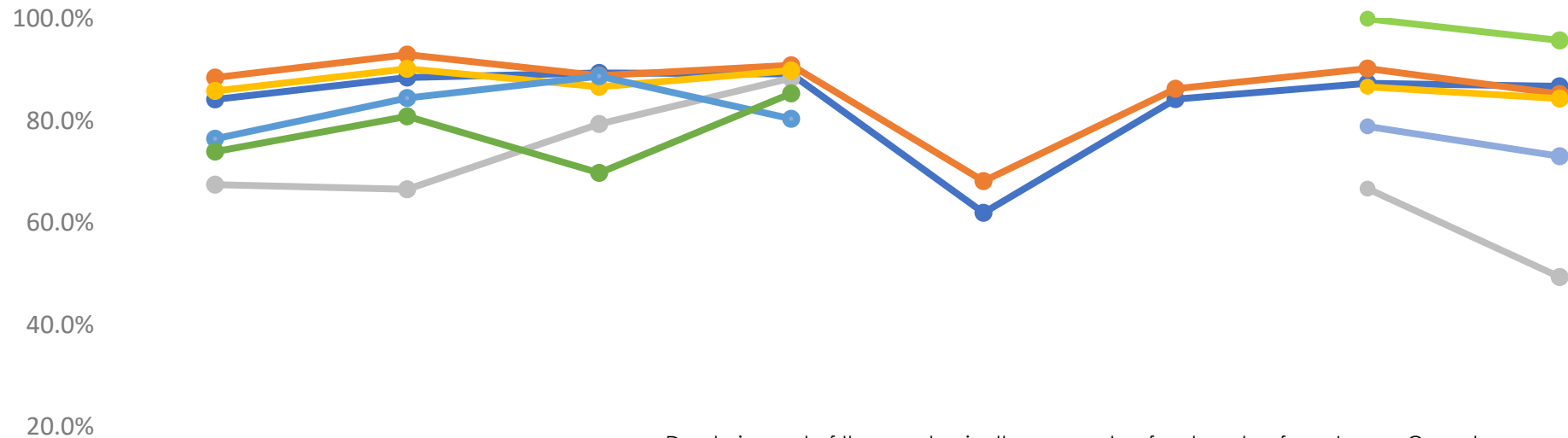
SATISFACTION - MAUI

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



SATISFACTION – MAUI

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



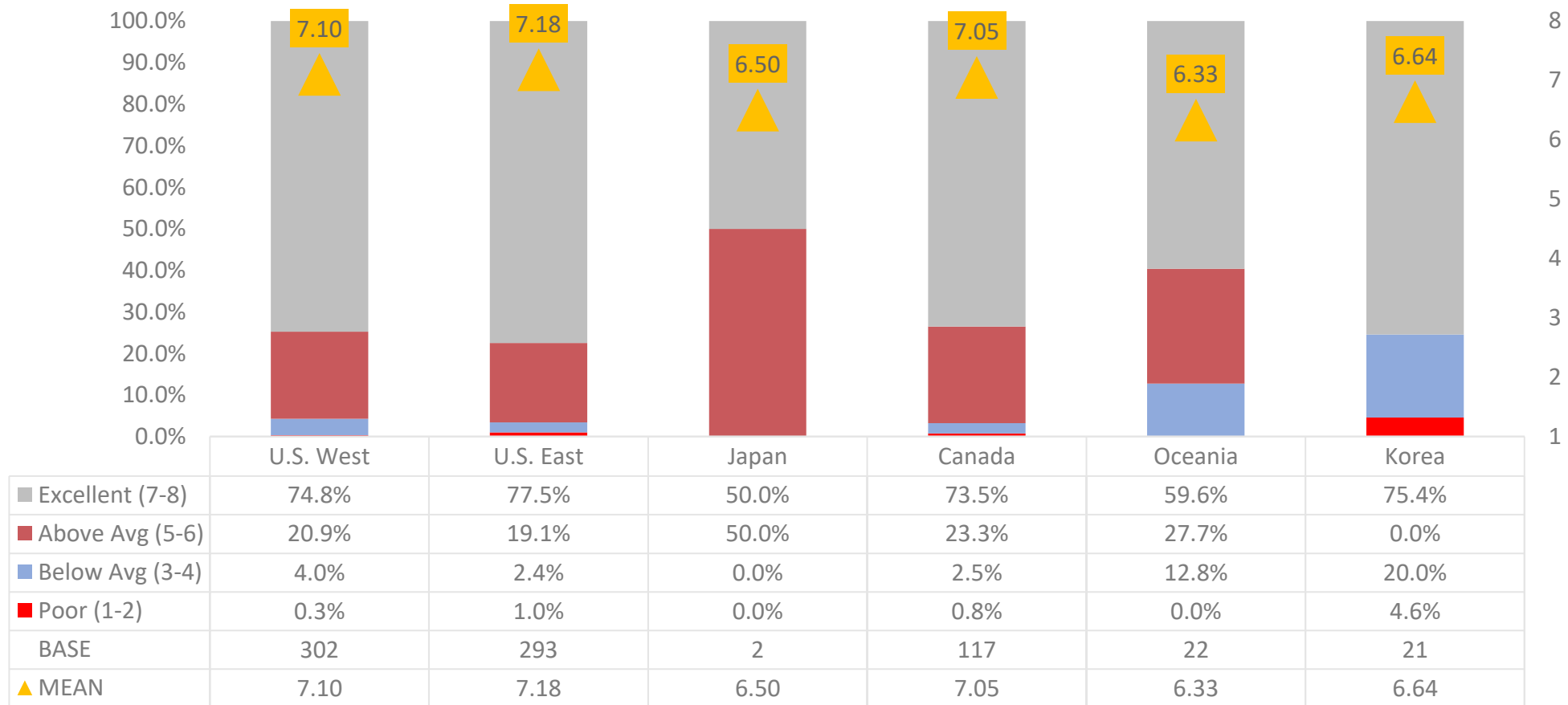
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	84.2%	88.5%	89.4%	89.2%	62.0%	84.3%	87.4%	86.8%
U.S. East	88.5%	93.0%	88.9%	90.9%	68.2%	86.3%	90.3%	85.3%
Japan	67.5%	66.6%	79.4%	88.4%			66.7%	49.4%
Canada	85.9%	90.2%	86.7%	89.9%			86.7%	84.4%
Oceania	76.5%	84.5%	88.8%	80.4%			78.9%	73.1%
Korea	74.0%	80.9%	69.8%	85.4%			100.0%	95.8%

P= Preliminary Data

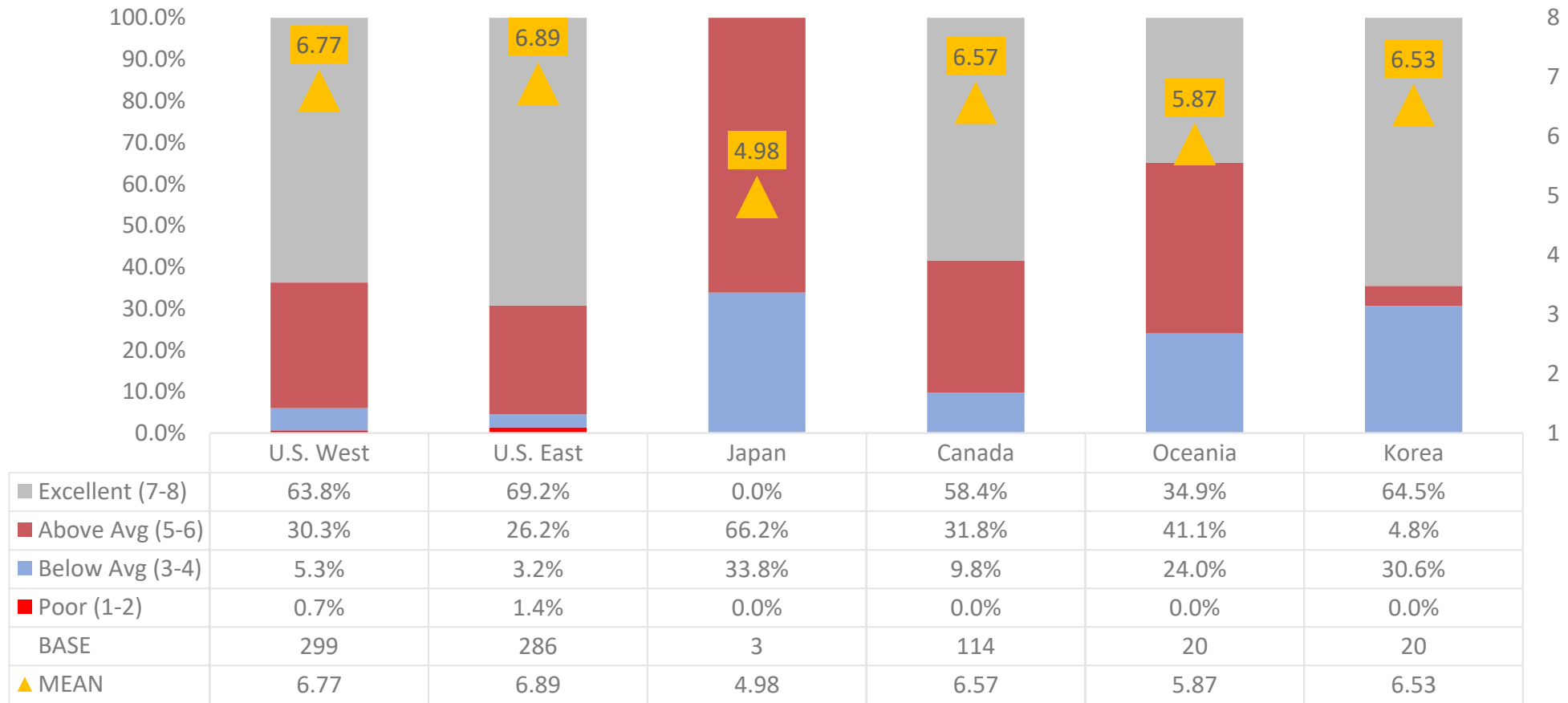
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



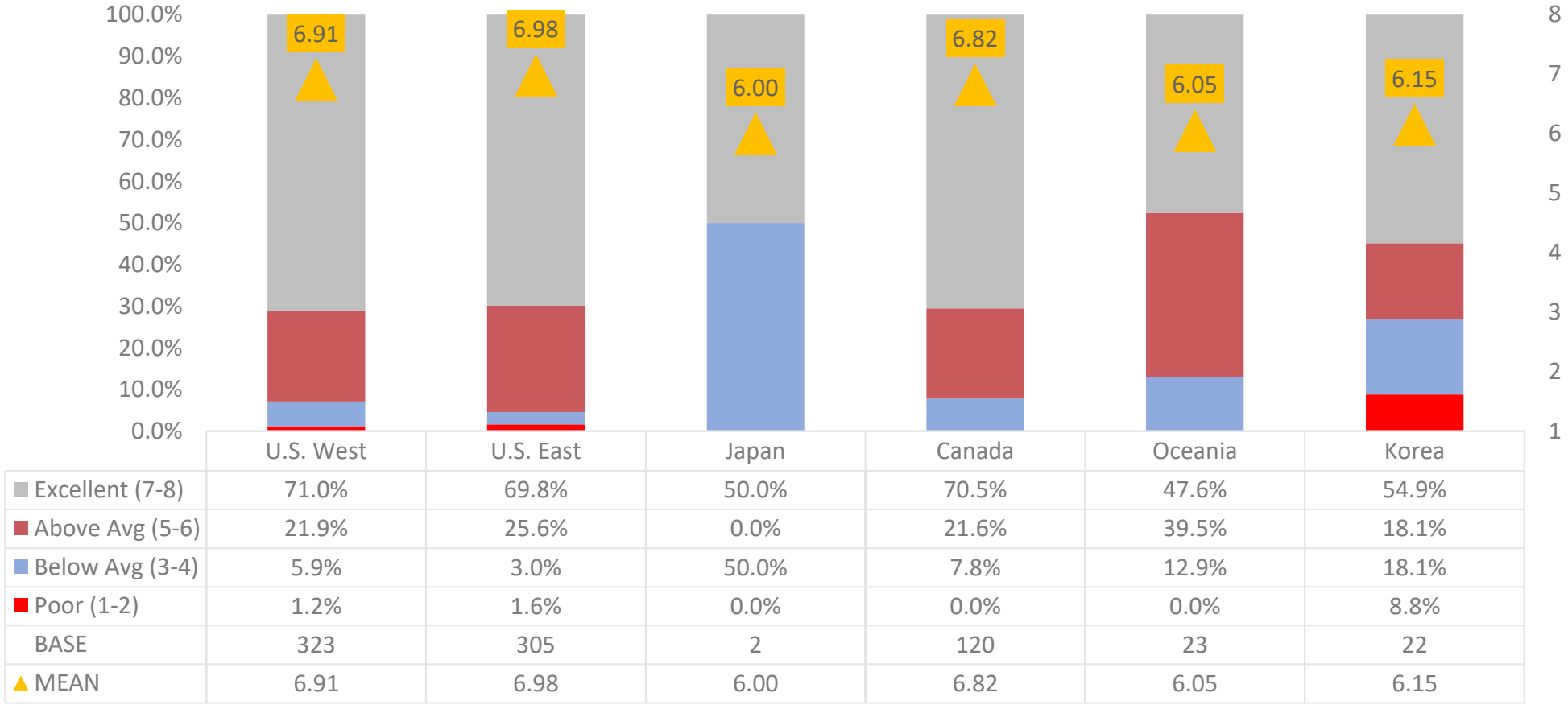
SHOPPING - MAUI

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



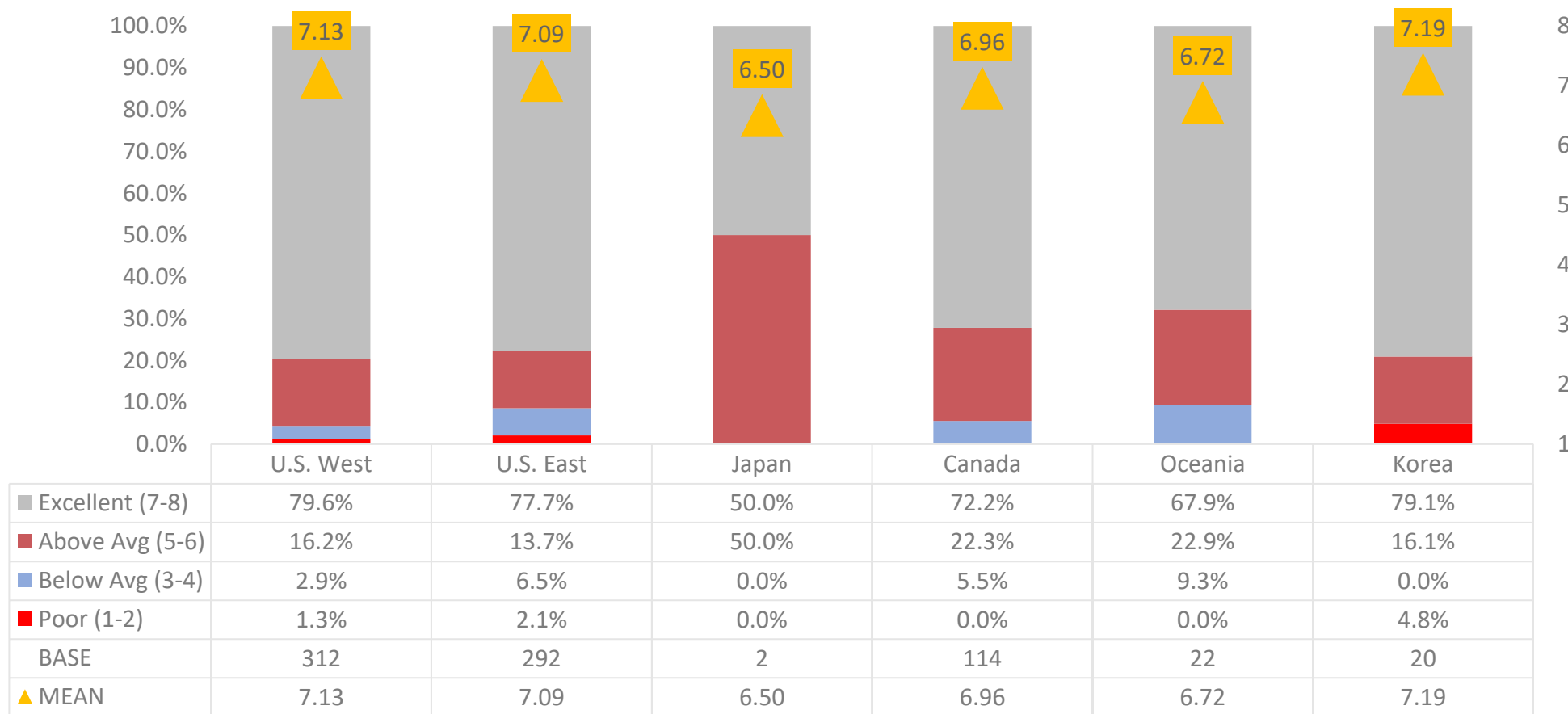
DINING/ FOOD & BEVERAGE - MAUI

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



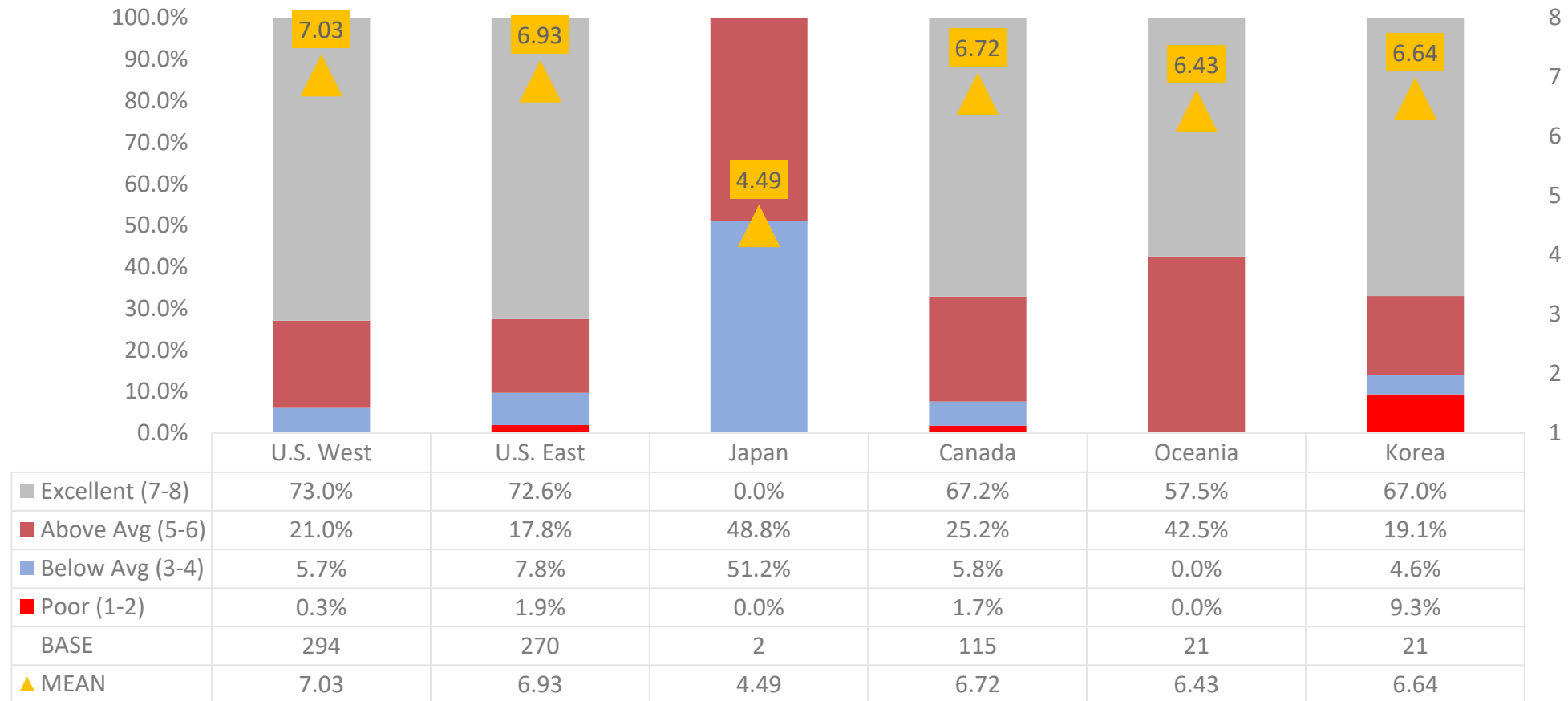
LODGING/ ACCOMMODATIONS - MAUI

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



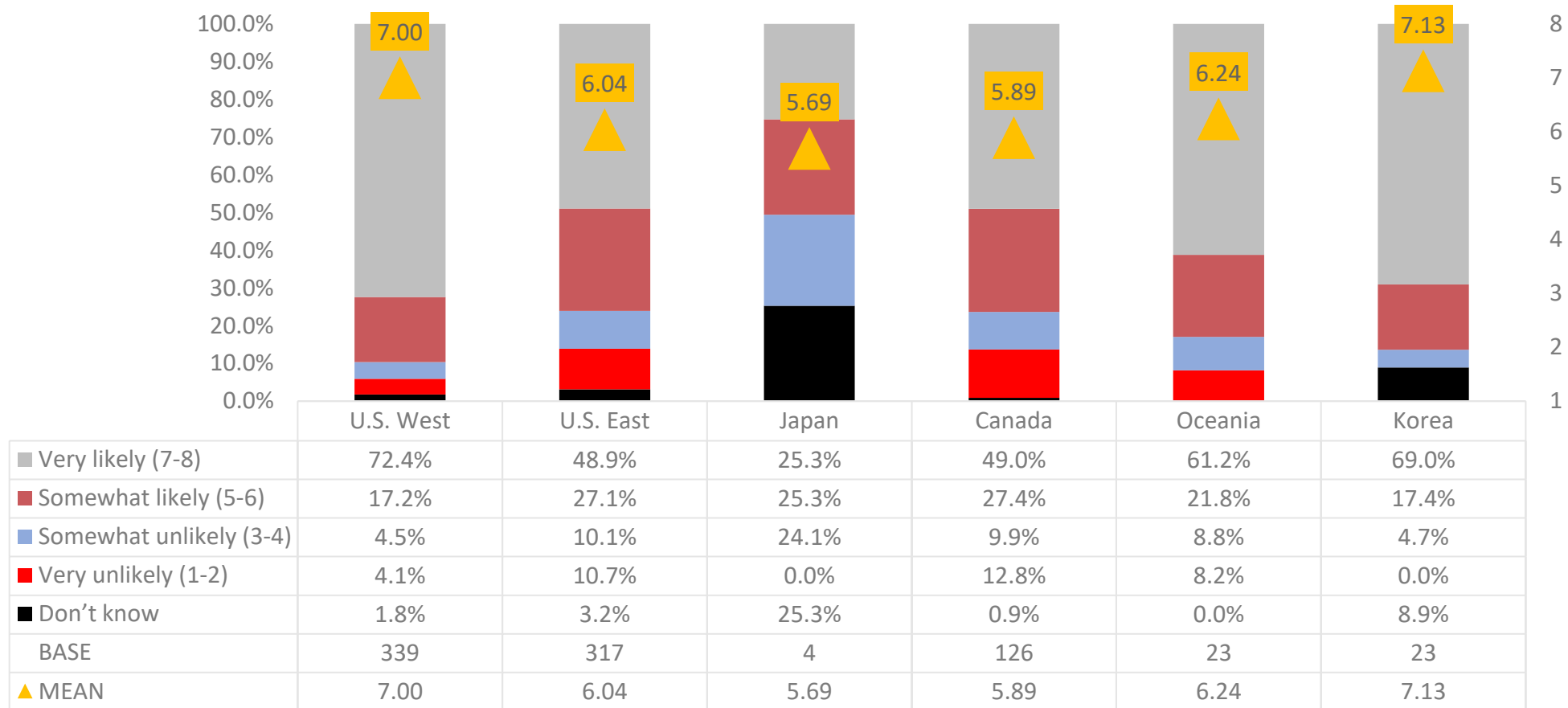
TRANSPORTATION ON ISLAND - MAUI

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



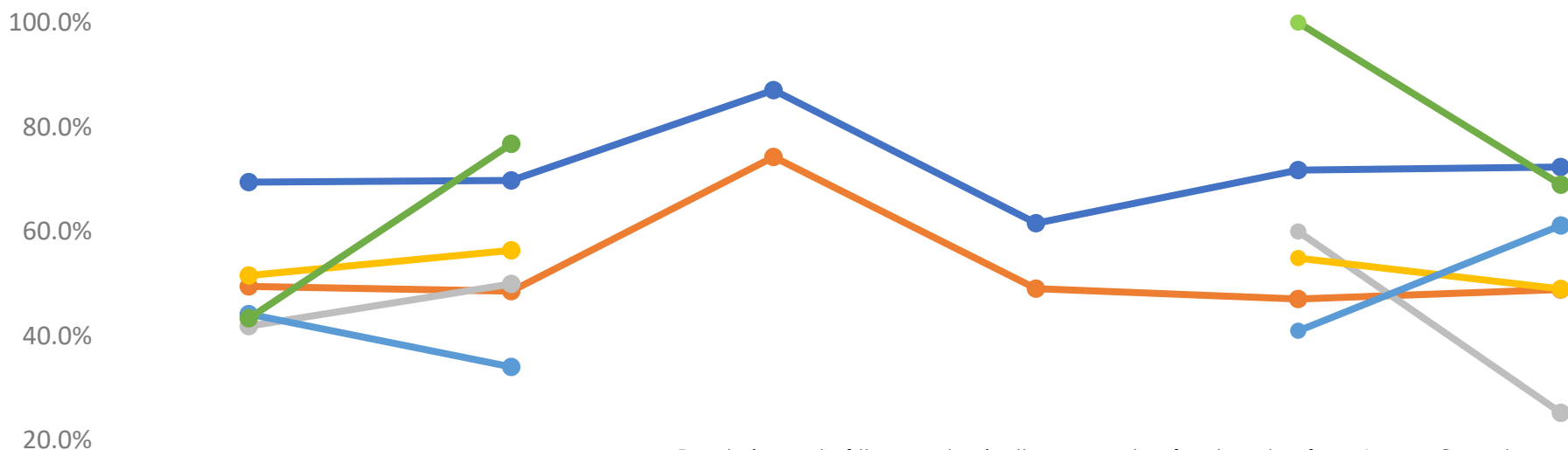
LIKELIHOOD OF RETURN VISIT – MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

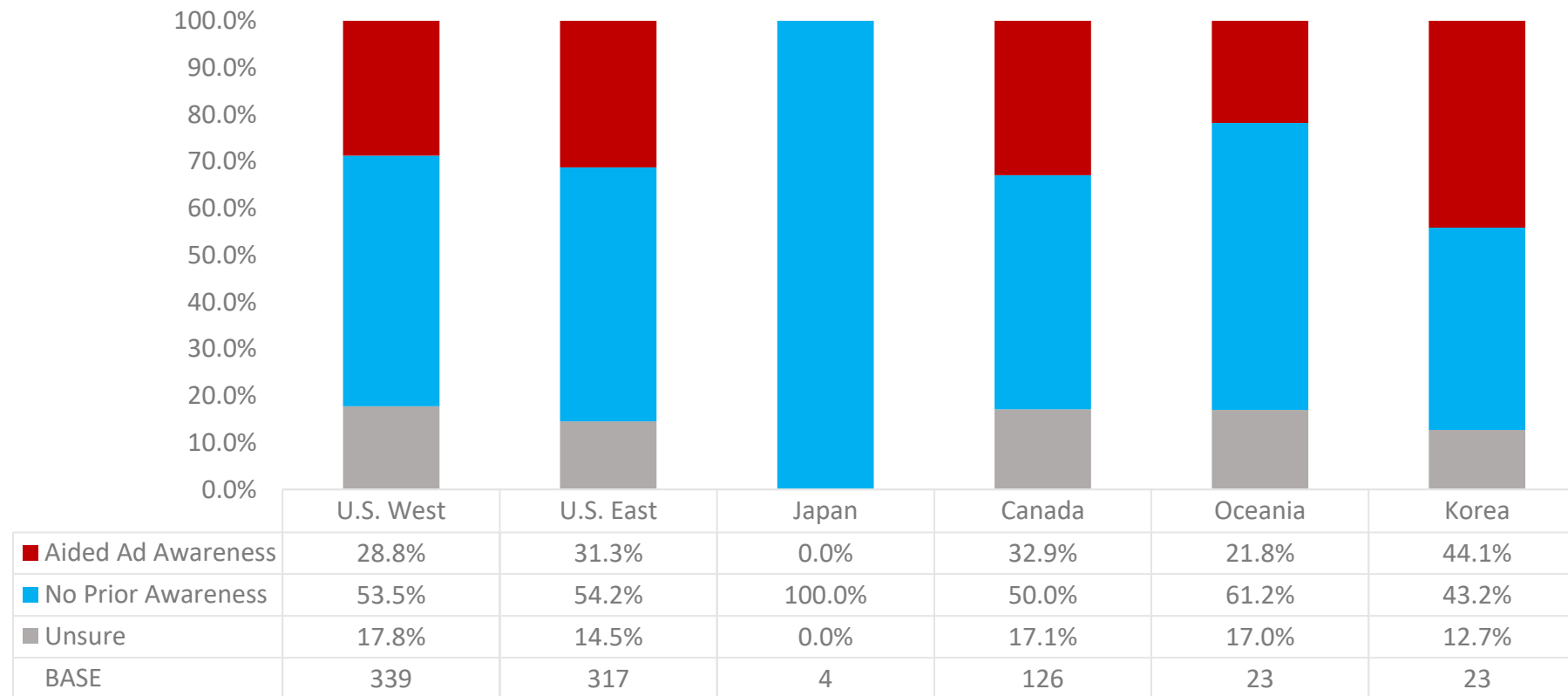


Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	69.5%	69.8%	87.1%	61.6%	71.8%	72.4%
U.S. East	49.5%	48.6%	74.3%	49.1%	47.1%	48.9%
Japan	41.9%	50.0%			60.0%	25.3%
Canada	51.6%	56.4%			54.9%	49.0%
Oceania	44.2%	34.1%			41.0%	61.2%
Korea	43.4%	76.8%			100.0%	69.0%

P= Preliminary Data

AIDED ADVERTISING AWARENESS - MAUI



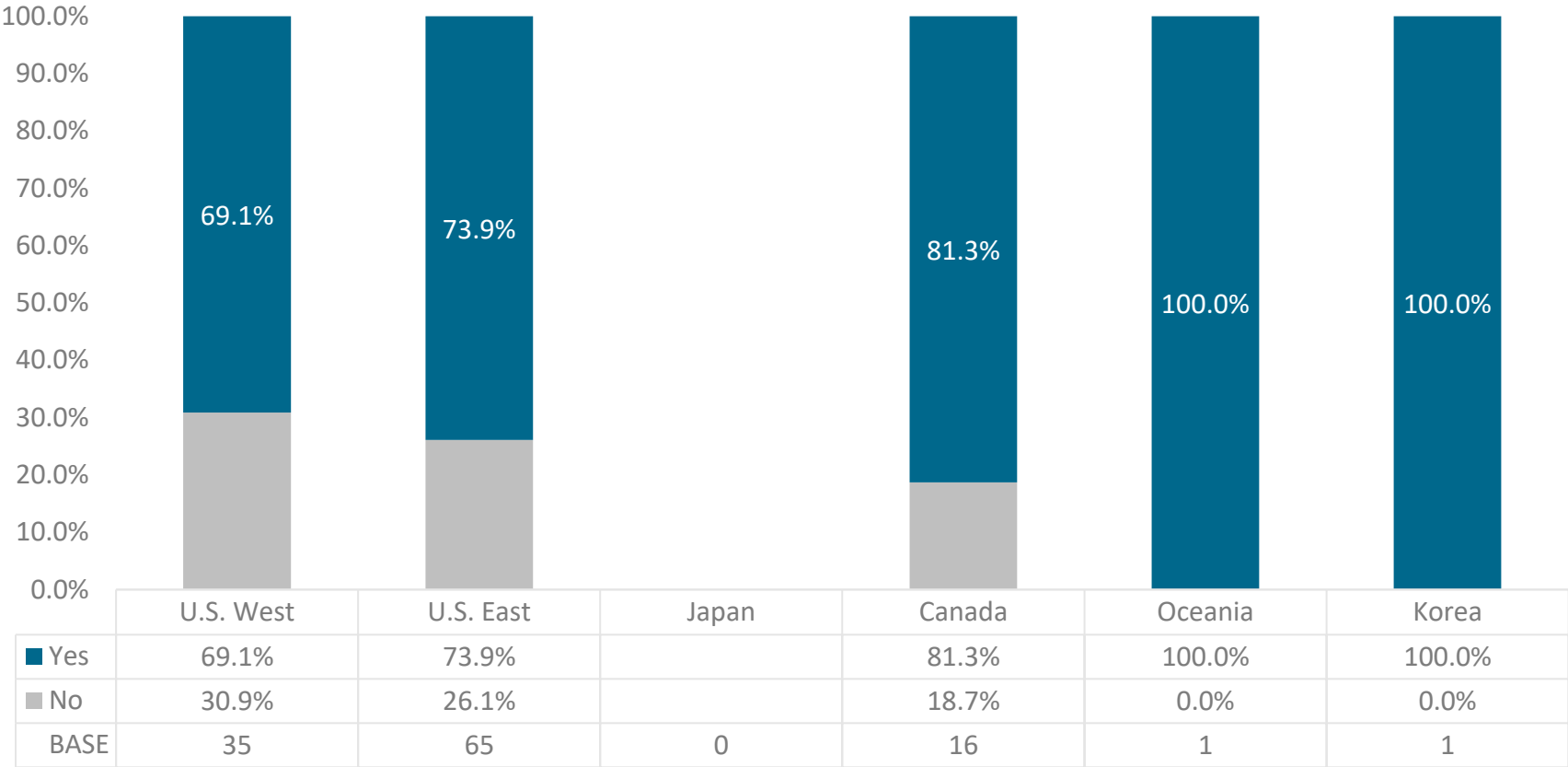
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	37.3%	39.7%	0.0%	51.0%	46.9%	42.7%
Hawaiian cultural events	5.9%	10.7%	0.0%	7.5%	4.8%	4.7%
Outdoor or sporting activities and events	17.7%	11.4%	25.3%	23.0%	4.1%	12.7%
Social media posts and videos	9.6%	16.3%	0.0%	18.1%	21.8%	12.7%
Hawaiian music	7.6%	3.8%	0.0%	6.2%	0.0%	0.0%
Television programs or movies filmed in Hawai'i	5.6%	6.6%	0.0%	6.4%	13.6%	13.1%
BASE	339	317	4	126	23	23

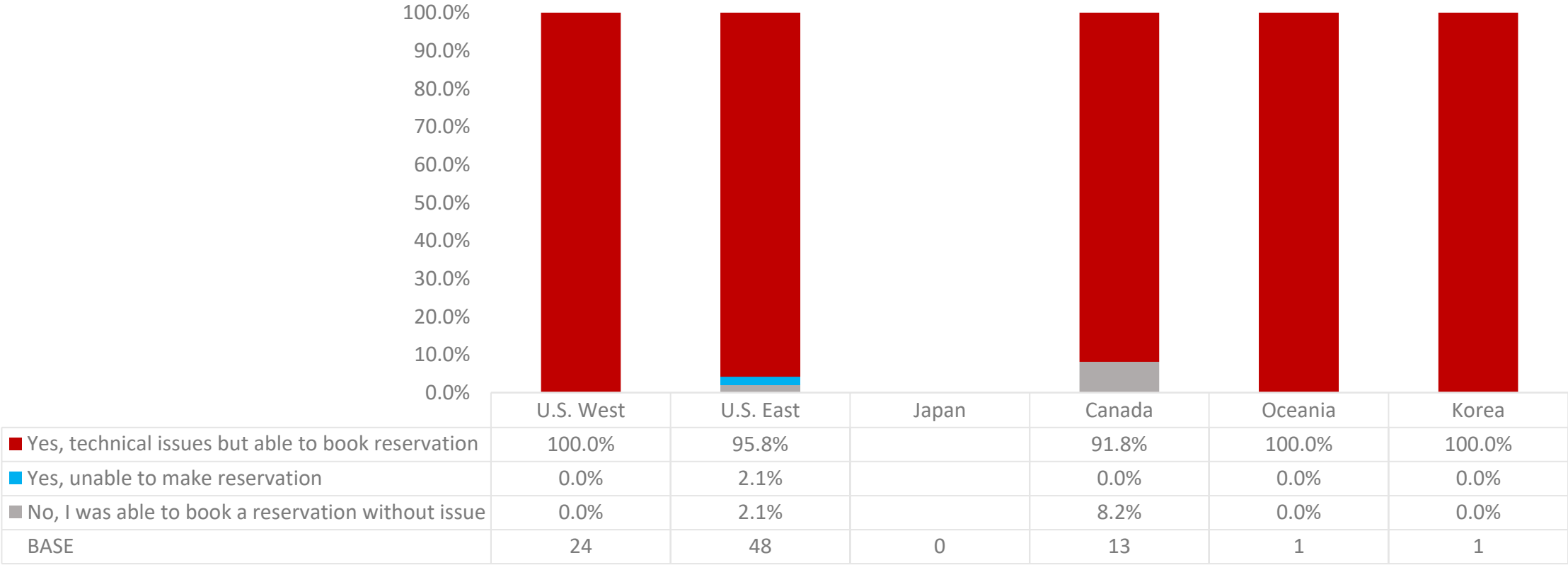
ATTRACTIONS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Alexander & Baldwin Sugar Museum	1.2%	1.3%	0.0%	2.2%	0.0%	18.6%
Aquarium Maui/ Maui Ocean Center	18.6%	13.1%	32.3%	17.7%	9.5%	4.4%
Baldwin Missionary Home Museum	3.0%	2.6%	0.0%	0.0%	4.8%	0.0%
Hale Pa'i Printing House	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Haleakalā National Park	25.5%	37.8%	0.0%	46.0%	21.8%	49.5%
Haleki'i-Pihana Heiau State Monument	1.5%	1.0%	0.0%	0.9%	0.0%	0.0%
Hana Cultural Center	7.2%	11.4%	0.0%	15.8%	8.8%	8.8%
ĪaoValley State Monument	13.7%	13.7%	0.0%	16.6%	4.1%	4.4%
Kepaniwai Park & Heritage Gardens	3.0%	3.2%	0.0%	2.6%	0.0%	4.9%
Kula Botanical Garden	5.1%	6.4%	0.0%	7.4%	8.8%	0.0%
Maui Historical Society Bailey House Museum	1.8%	0.6%	0.0%	0.0%	0.0%	0.0%
Wai'ānapanapa State Park	10.5%	20.7%	0.0%	13.3%	4.1%	4.4%
Whaler's Village Museum	8.1%	8.6%	0.0%	6.6%	8.8%	0.0%
Wo Hing Temple Museum	1.5%	1.6%	0.0%	0.7%	4.1%	0.0%

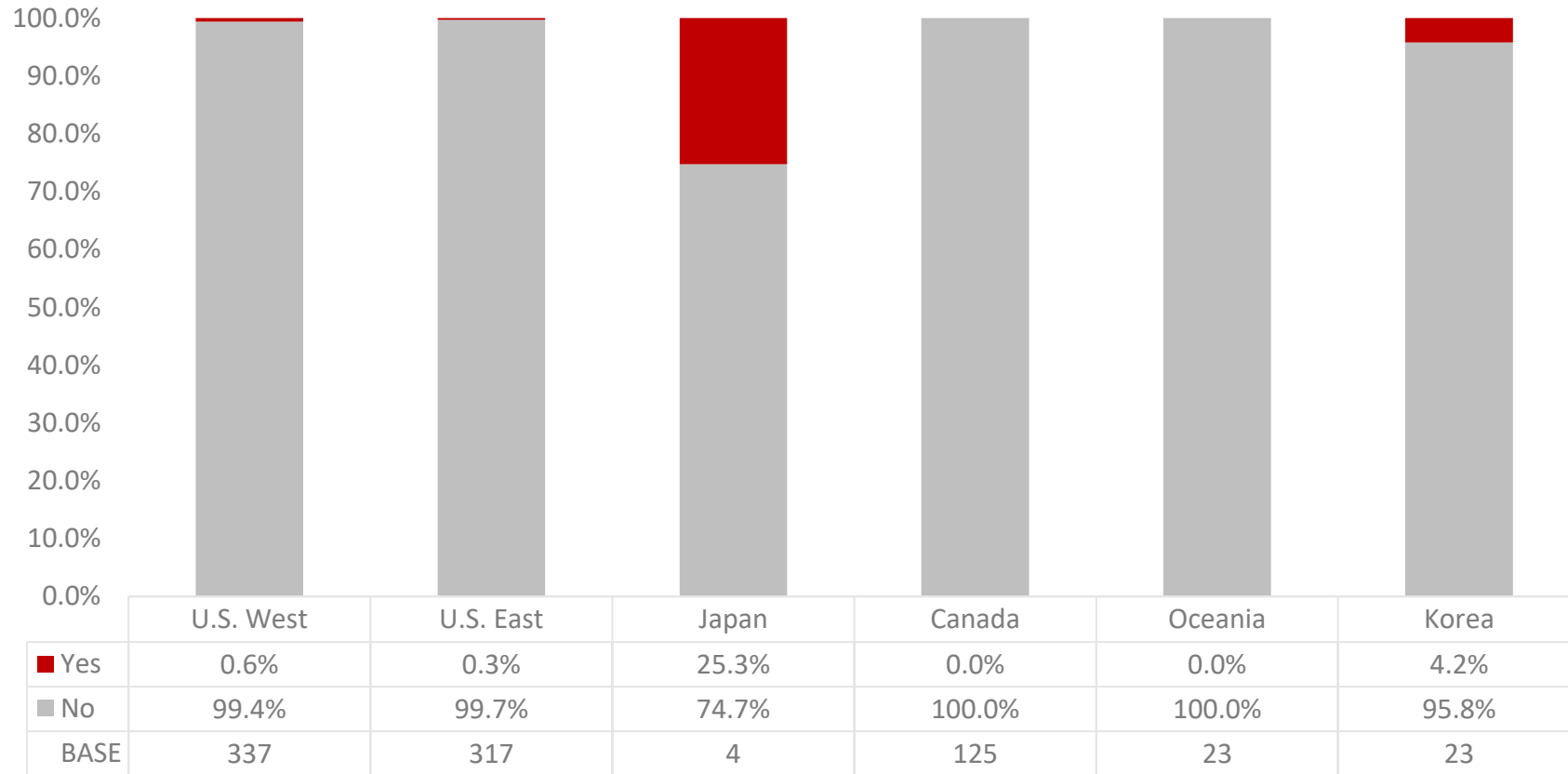
WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



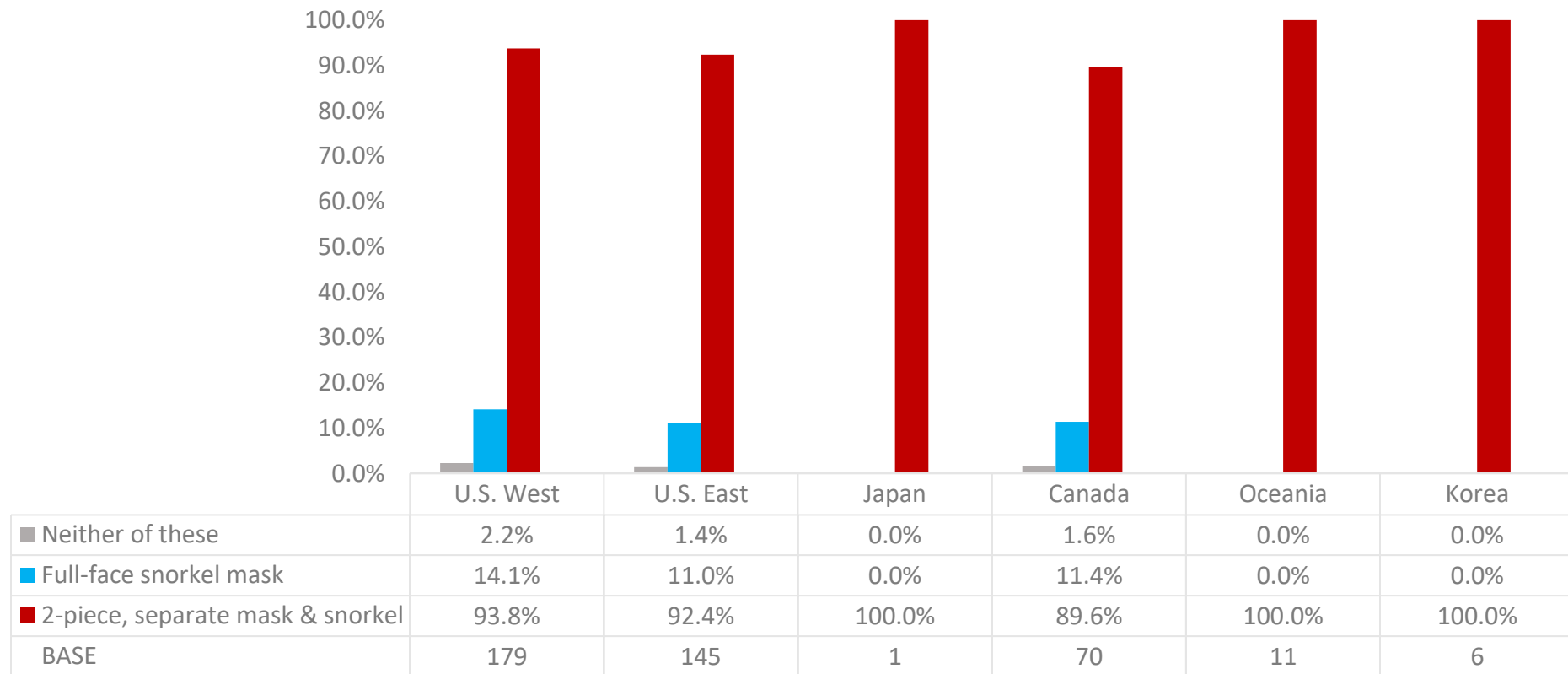
VISITED MAUI FOR SPECIFIC EVENT



VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Other (please specify festival/event name)	51.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Convention, conference, retreat, seminar, meeting, workshop, training, work event	48.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Other sporting event	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%
Hawai'i Food and Wine Festival	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%
BASE	2	2	1	0	0	1

SNORKELING EQUIPMENT USED - MAUI



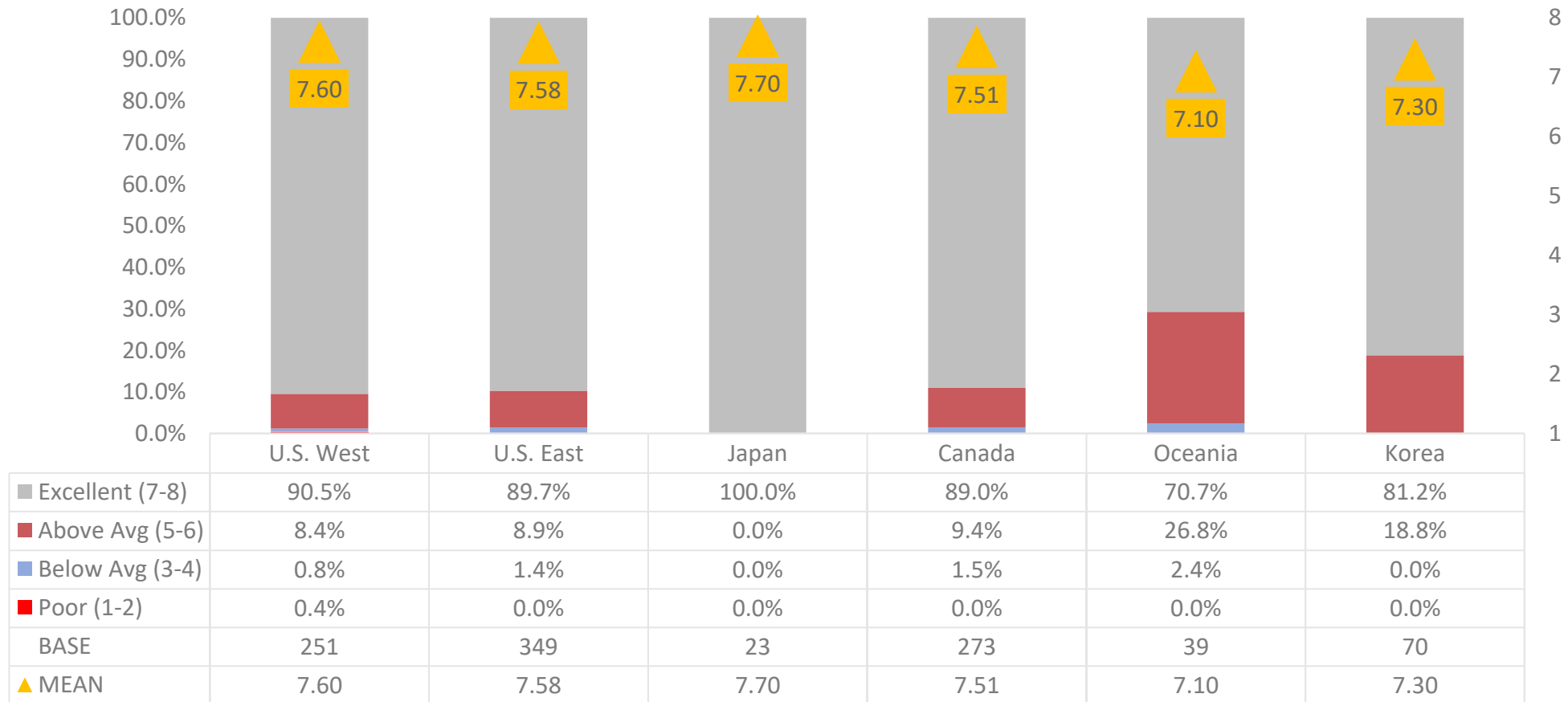
SNORKELING OCEAN SAFETY - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	98.2%	98.6%	100.0%	98.4%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	1.8%	1.4%	0.0%	1.6%	0.0%	0.0%
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	175	143	1	69	11	6

Section 8 – Island of Hawai‘i

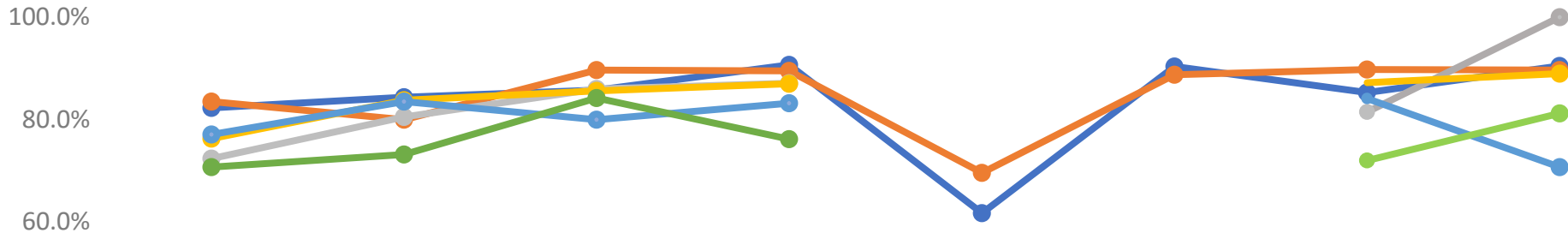
SATISFACTION - ISLAND OF HAWAI‘I

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



SATISFACTION - ISLAND OF HAWAI‘I

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



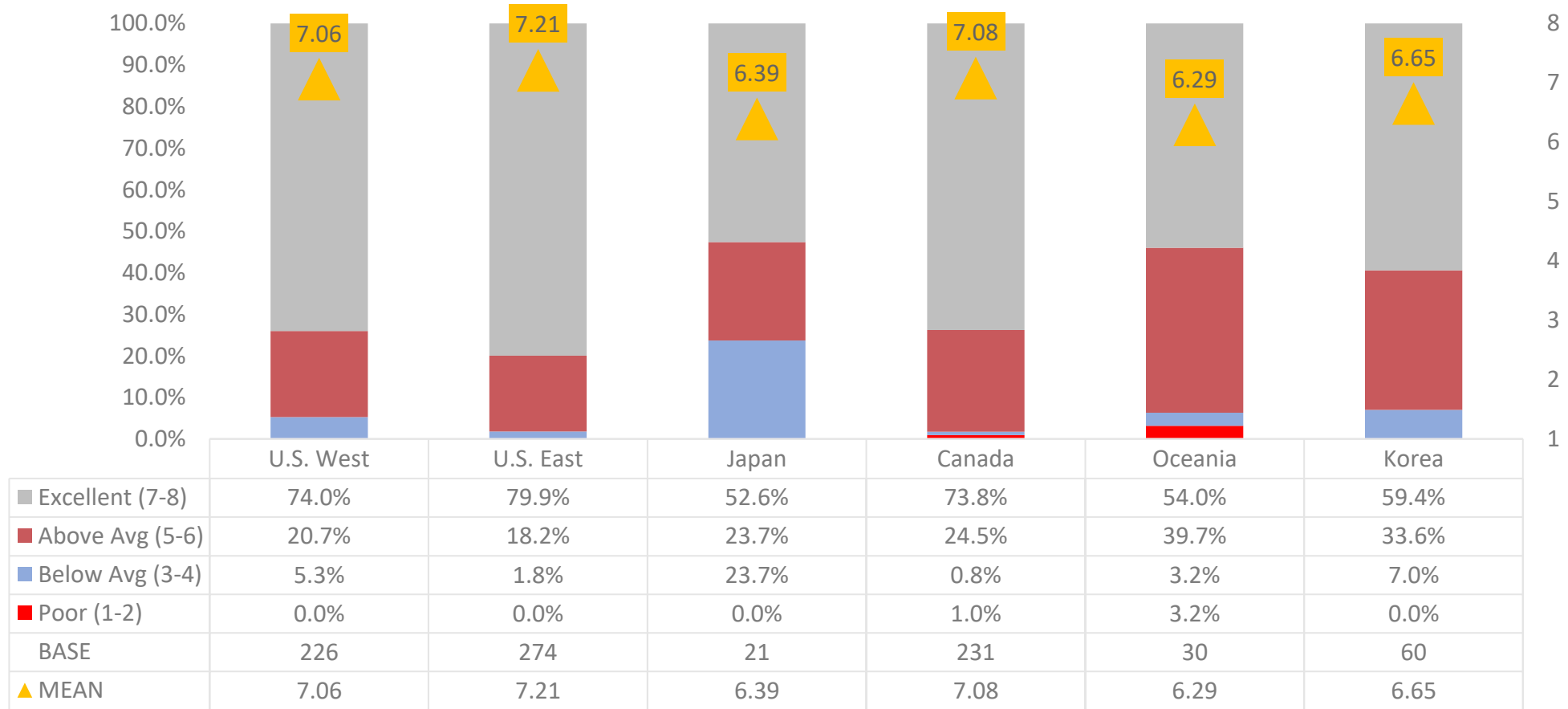
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2016	Q3 2017	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	82.3%	84.4%	85.8%	90.7%	61.7%	90.4%	85.3%	90.5%
U.S. East	83.5%	80.0%	89.7%	89.5%	69.6%	88.8%	89.8%	89.7%
Japan	72.4%	80.5%	86.0%	87.1%			81.5%	100.0%
Canada	76.3%	83.8%	85.6%	87.0%			87.2%	89.0%
Oceania	77.1%	83.5%	80.0%	83.2%			84.1%	70.7%
Korea	70.7%	73.2%	84.2%	76.2%			72.0%	81.2%

P= Preliminary Data

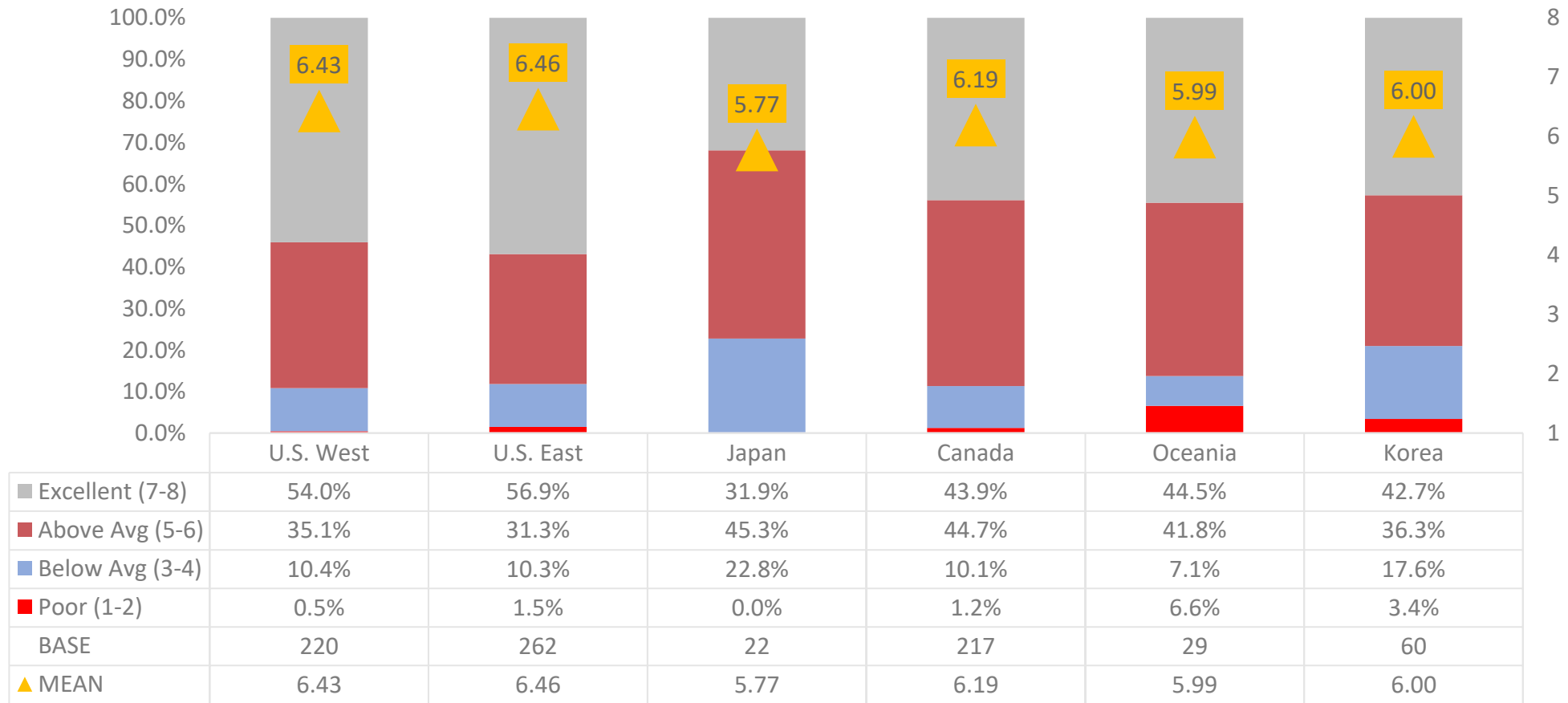
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI‘I

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



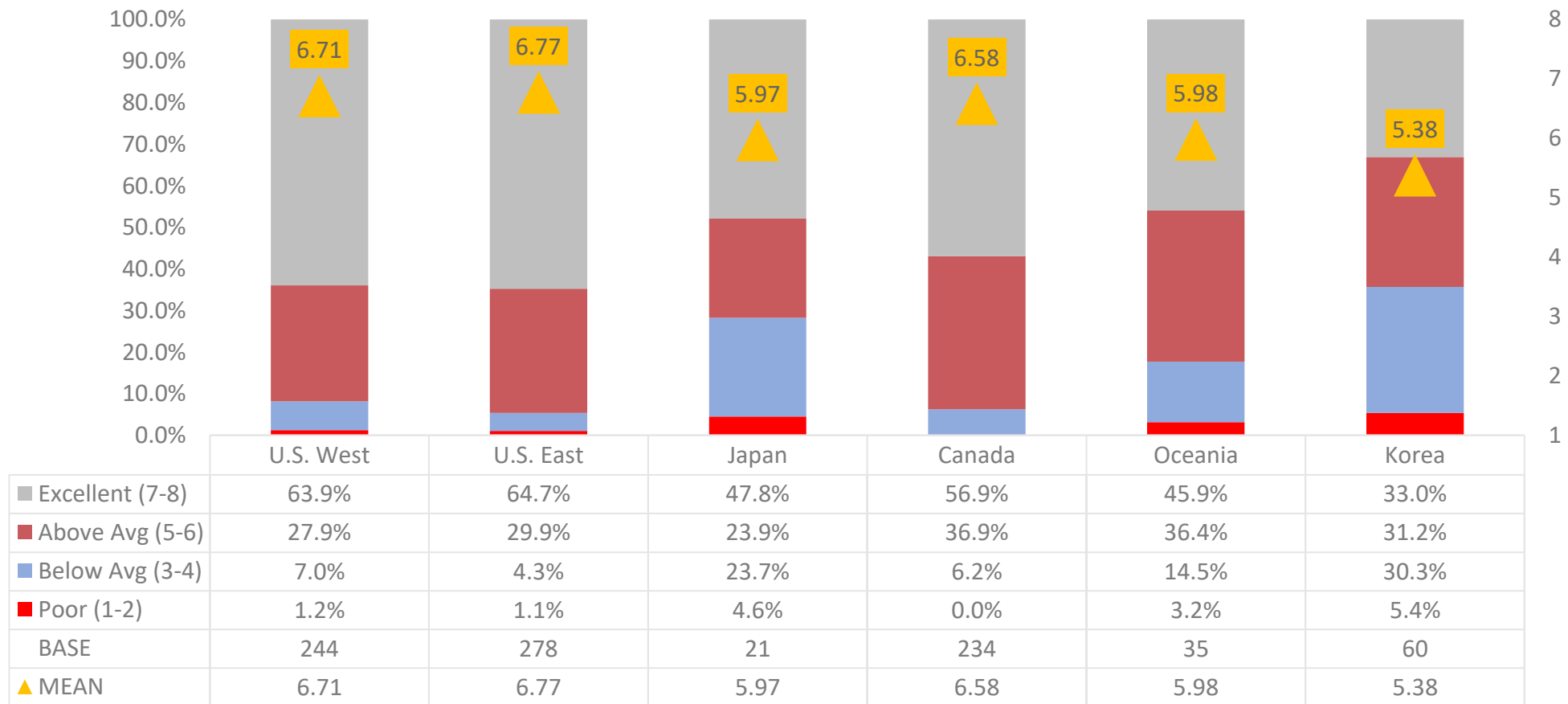
SHOPPING - ISLAND OF HAWAI'I

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



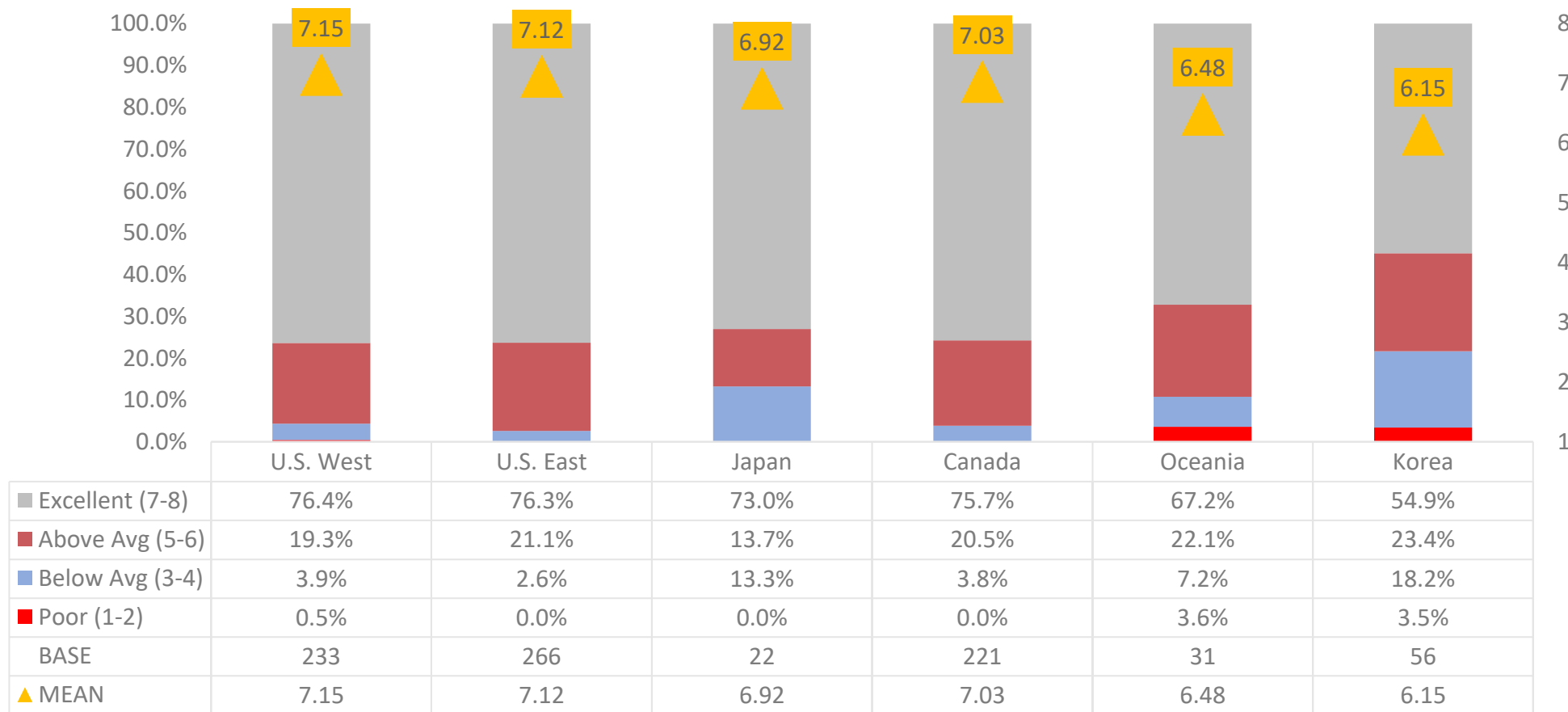
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



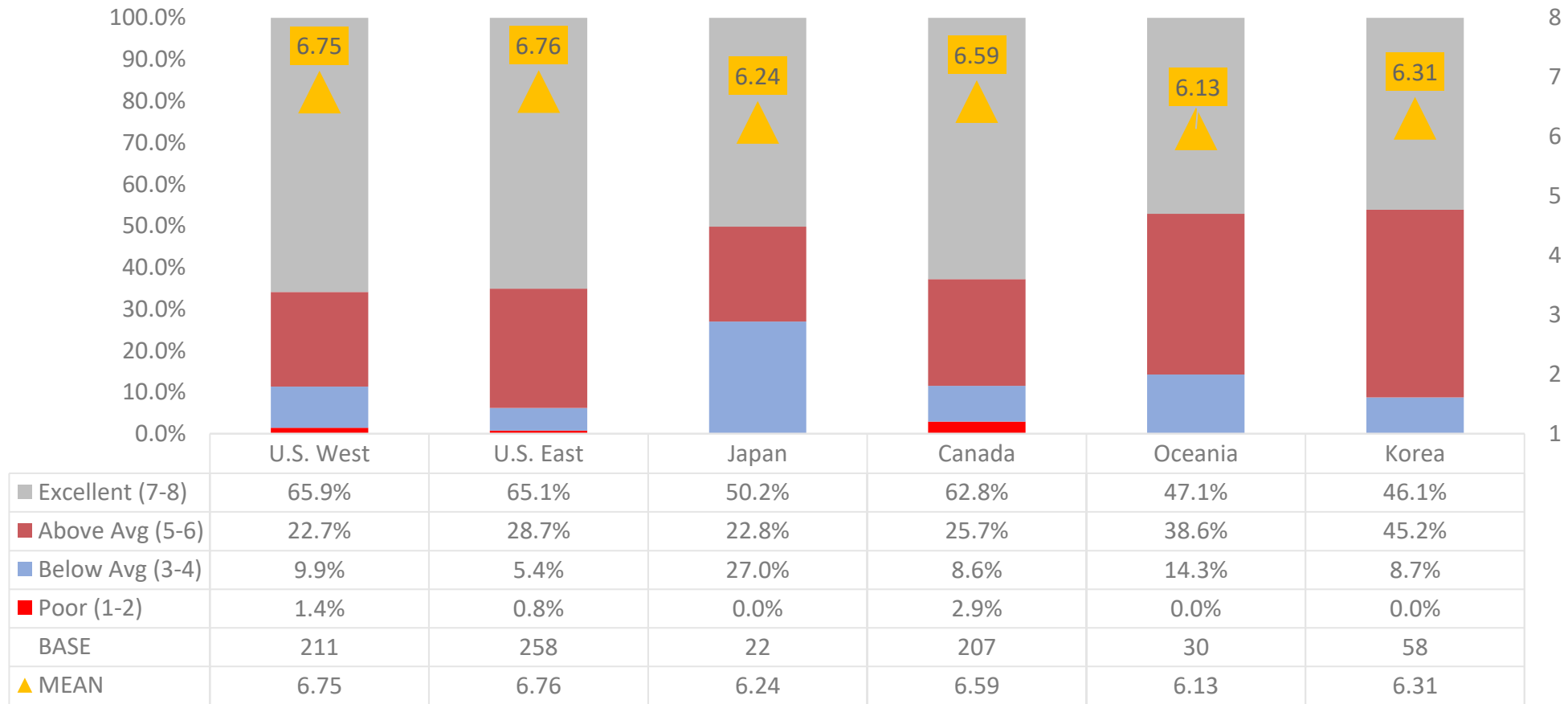
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



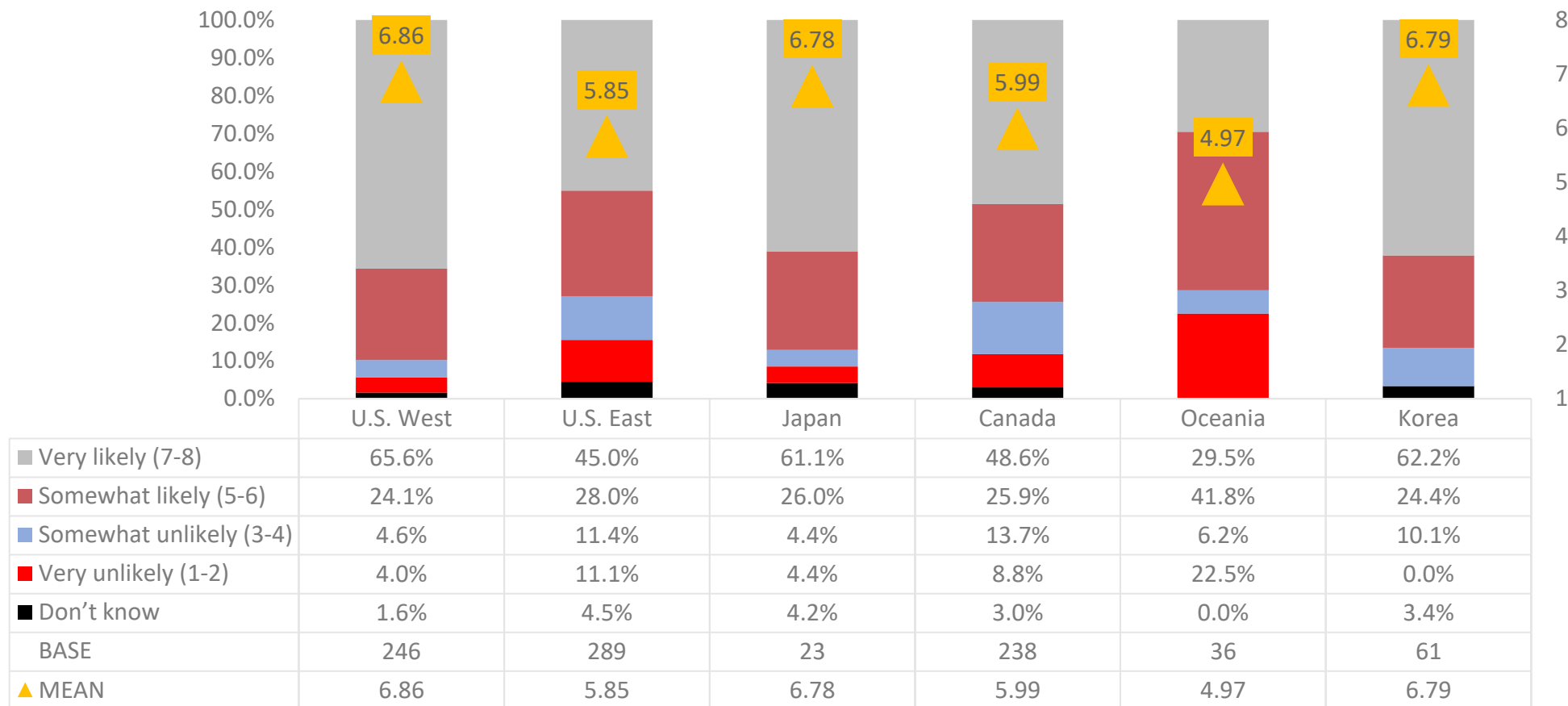
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI‘I

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



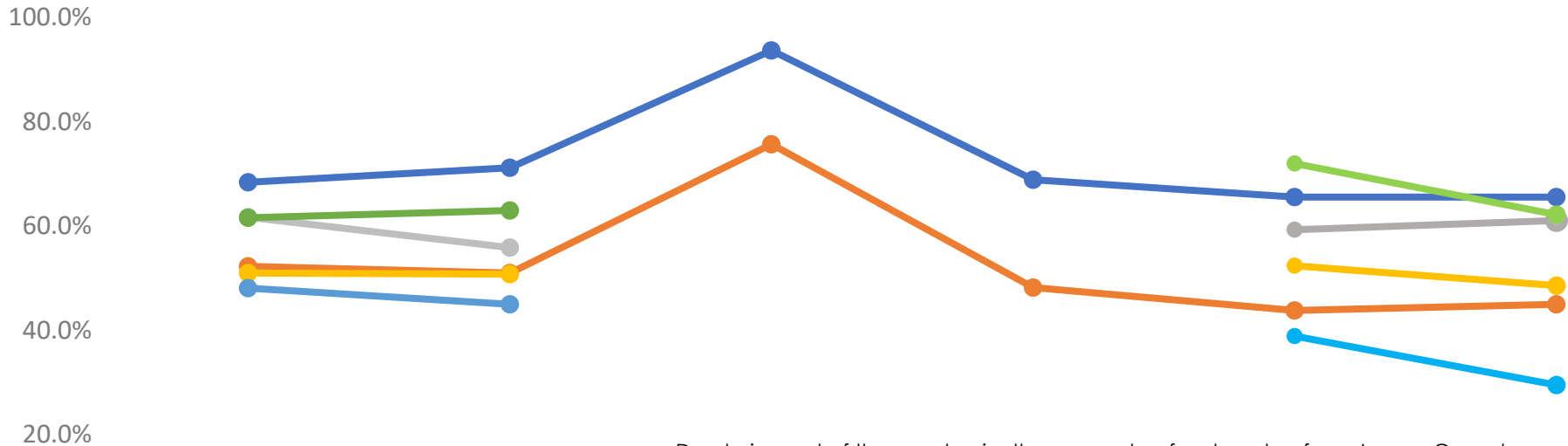
LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI‘I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

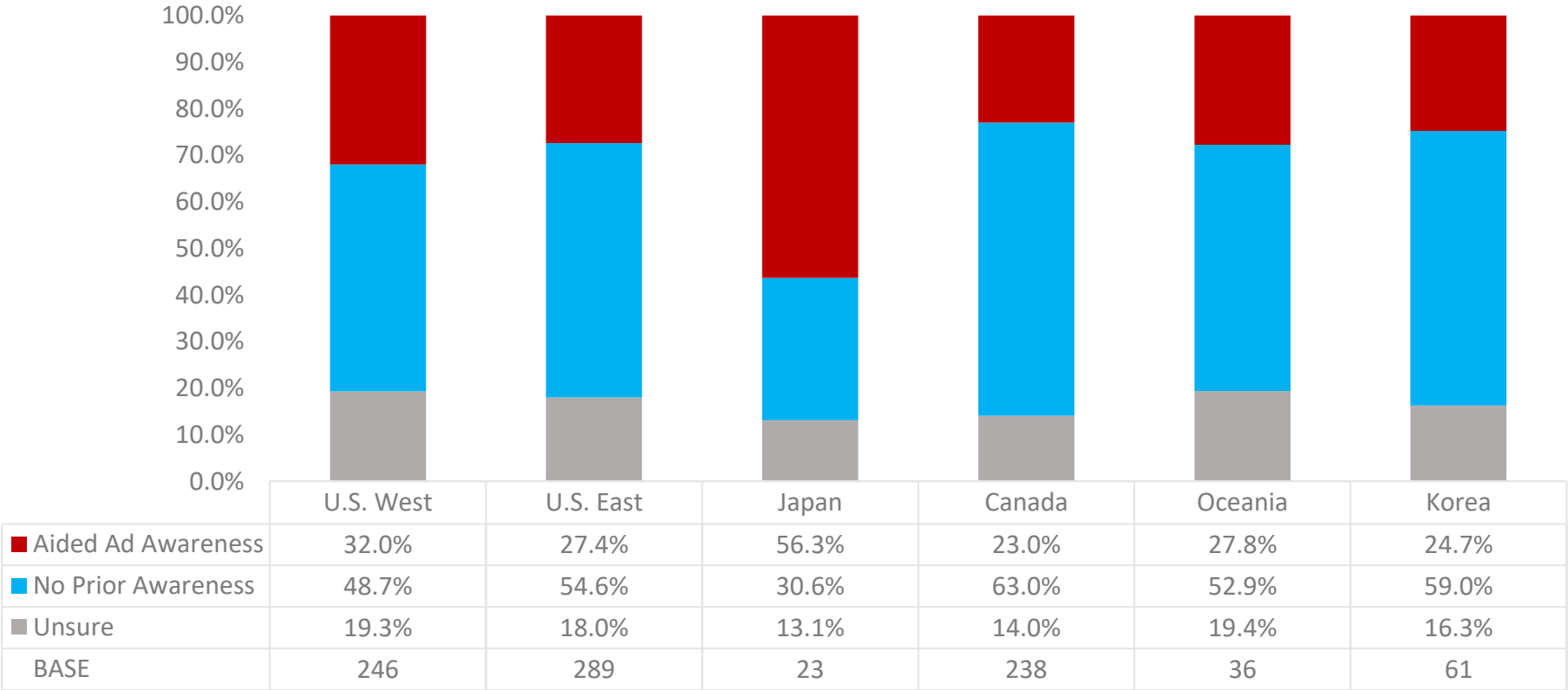


Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q3 2018	Q3 2019	Q3 2020	Q3 2021	Q3 2022	Q3 2023 P
U.S. West	68.4%	71.2%	93.7%	68.9%	65.6%	65.6%
U.S. East	52.3%	51.0%	75.7%	48.2%	43.8%	45.0%
Japan	61.7%	55.9%			59.3%	61.1%
Canada	51.0%	50.8%			52.4%	48.6%
Oceania	48.1%	45.0%			38.9%	29.5%
Korea	61.6%	63.0%			72.0%	62.2%

P= Preliminary Data

AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI‘I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Famous landmarks or imagery/ natural beauty	44.2%	50.5%	82.5%	56.4%	47.6%	65.9%
Outdoor or sporting activities and events	24.7%	15.2%	21.8%	24.4%	5.3%	11.7%
Hawaiian cultural events	13.4%	13.8%	13.1%	16.1%	10.6%	0.0%
Social media posts and videos	9.7%	12.1%	21.8%	12.6%	11.5%	24.6%
Television programs or movies filmed in Hawai'i	7.8%	9.3%	21.8%	8.1%	7.9%	21.5%
Hawaiian music	9.7%	6.2%	21.8%	8.4%	2.6%	1.6%
BASE	246	289	23	238	36	61

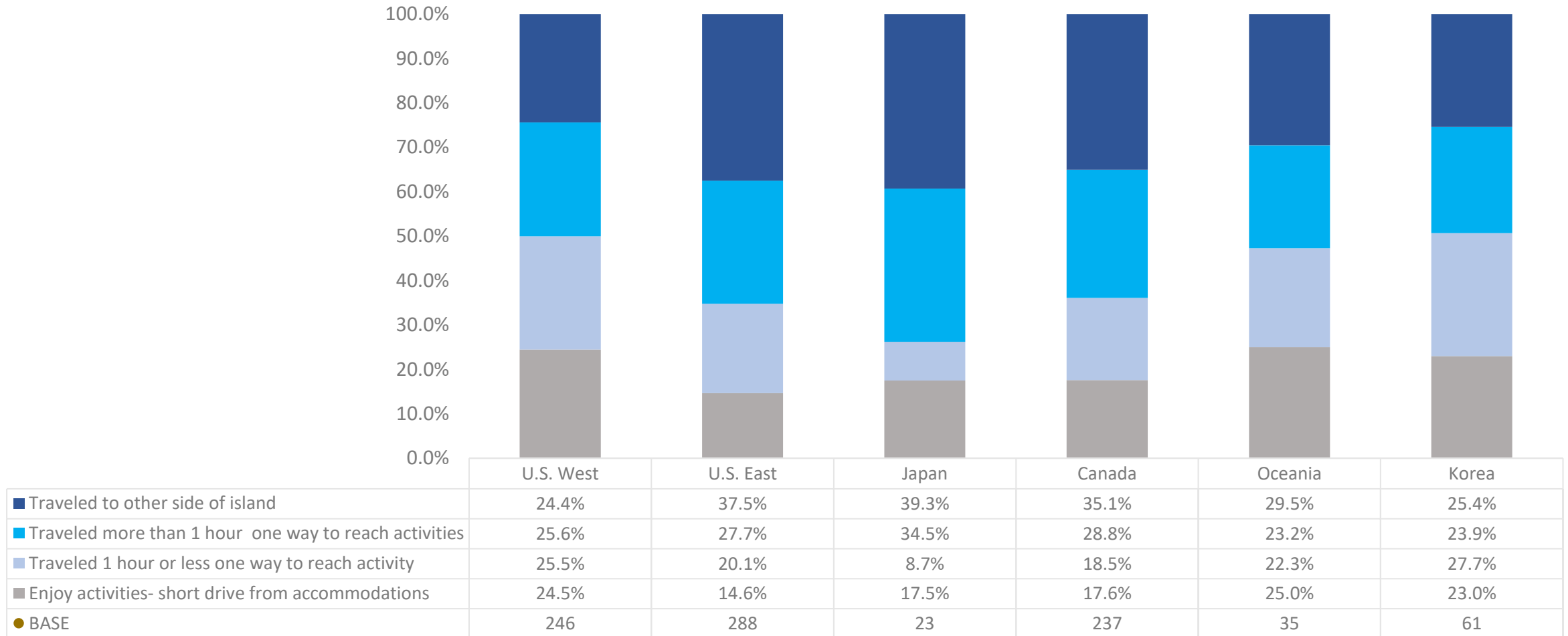
ATTRACTIONS – ISLAND OF HAWAI‘I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
‘Akaka Falls	24.0%	31.5%	30.6%	40.9%	16.8%	21.5%
Botanical Gardens	22.1%	20.8%	8.7%	23.2%	11.8%	9.9%
H.N. Greenwell Store	3.7%	3.5%	0.0%	3.7%	0.0%	1.8%
Hawai‘i Volcanoes National Park	48.9%	72.5%	52.0%	71.3%	54.5%	72.1%
Hilo Farmers Market	24.9%	29.5%	30.6%	31.6%	20.0%	21.7%
Hulihe‘e Palace	5.3%	4.8%	8.7%	6.7%	5.5%	1.6%
‘Imiloa Astronomy Ctr	2.0%	2.4%	0.0%	0.9%	5.5%	1.6%
Kaloko-Honokōhau National Historical Park	9.4%	16.6%	26.2%	16.3%	5.9%	3.2%
Kona Coffee Living History Farm	14.2%	14.9%	21.6%	17.1%	25.5%	43.1%
Lili‘uokalani Park and Garden	10.2%	11.4%	8.7%	13.0%	5.5%	6.7%

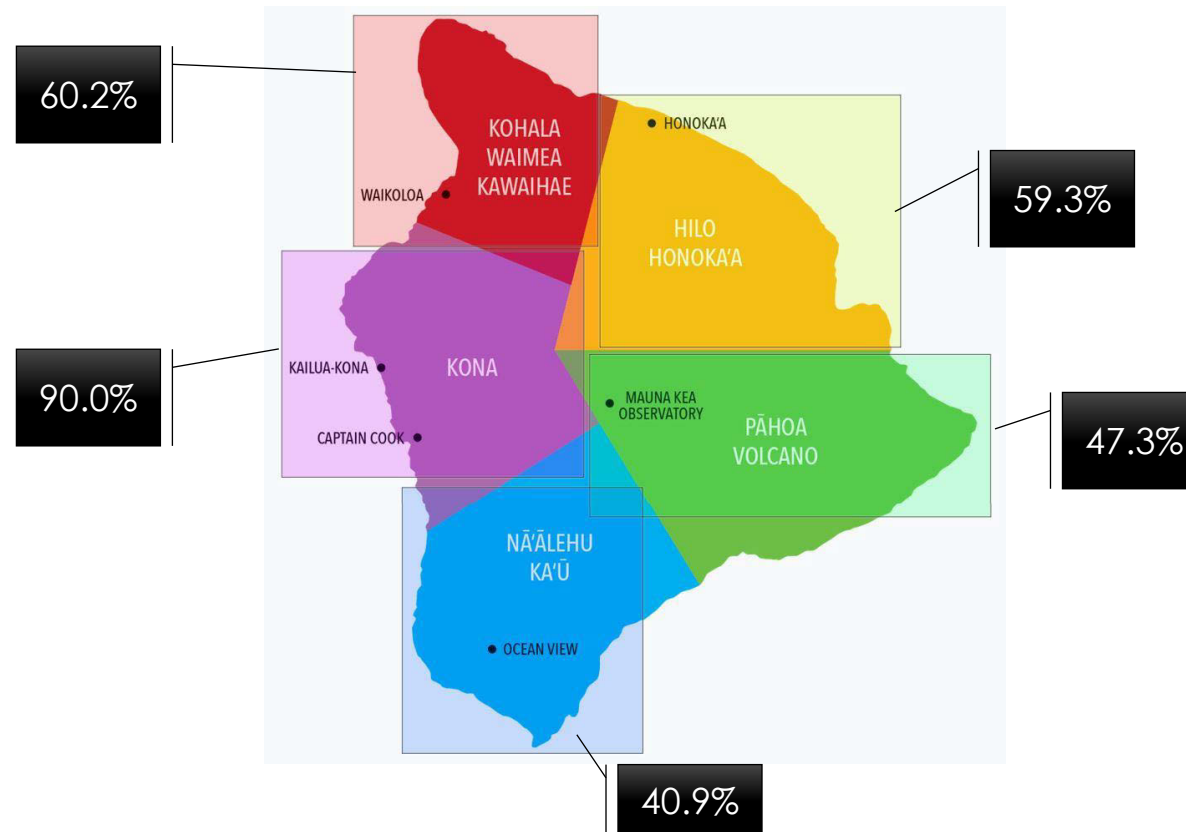
ATTRACTIONS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Lyman House Memorial Museum	1.6%	0.7%	0.0%	1.1%	0.0%	0.0%
Maunakea Visitor Ctr/ Summit	14.3%	20.4%	43.5%	26.6%	3.2%	51.2%
Orchid Farm	1.6%	1.0%	0.0%	1.7%	0.0%	3.2%
Pacific Tsunami Museum	1.2%	2.8%	0.0%	3.1%	0.0%	1.8%
Pana'ewa Rainforest Zoo & Garden	4.5%	4.5%	4.4%	4.4%	2.7%	3.4%
Pu'uhonua o Hōnaunau National Historical Park	19.4%	23.9%	8.7%	30.7%	11.4%	11.7%
Pu'ukoholā Heiau National Historical Site	9.0%	12.8%	8.5%	17.3%	0.0%	4.8%
Punalu'u Black Sand Beach	33.4%	40.9%	26.0%	51.7%	31.4%	29.9%
Rainbow Falls	33.6%	39.5%	34.9%	38.7%	30.9%	16.4%
Volcano Art Center	6.5%	11.4%	8.7%	13.2%	14.5%	14.8%

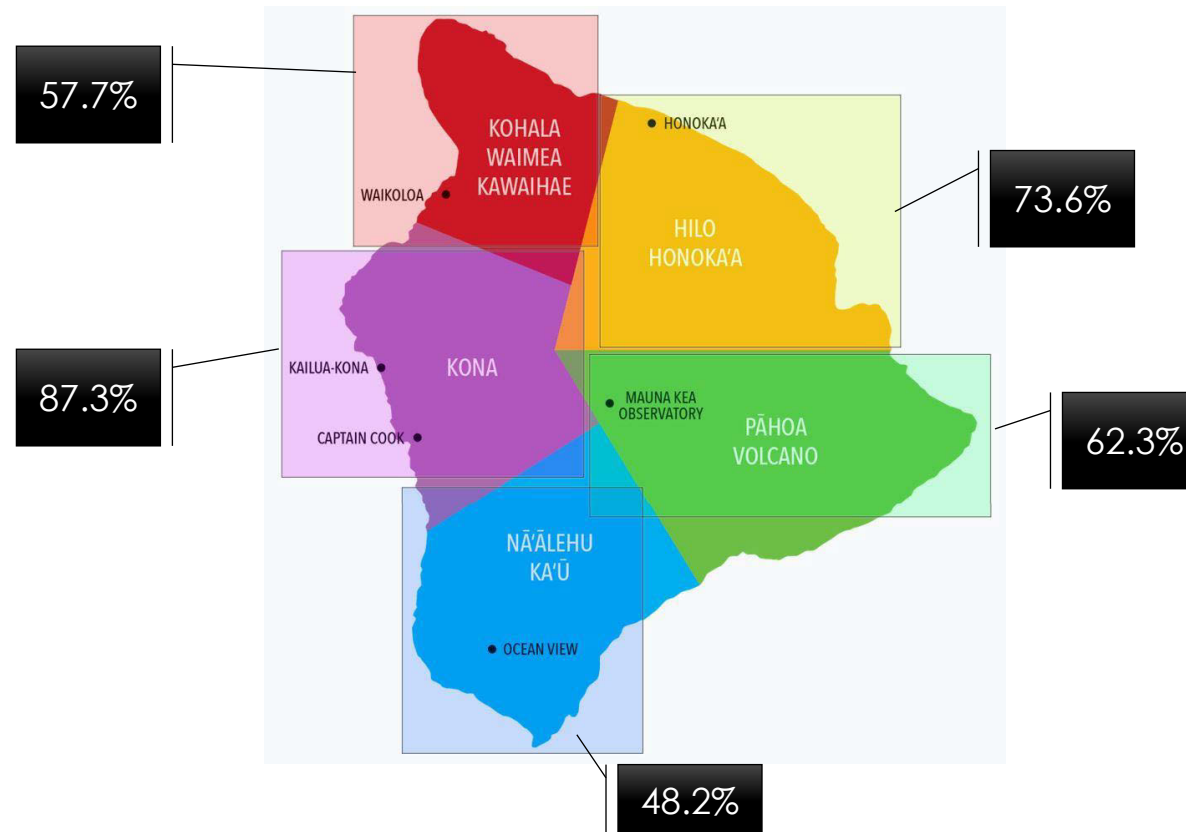
TRAVEL ON ISLAND OF HAWAI'I



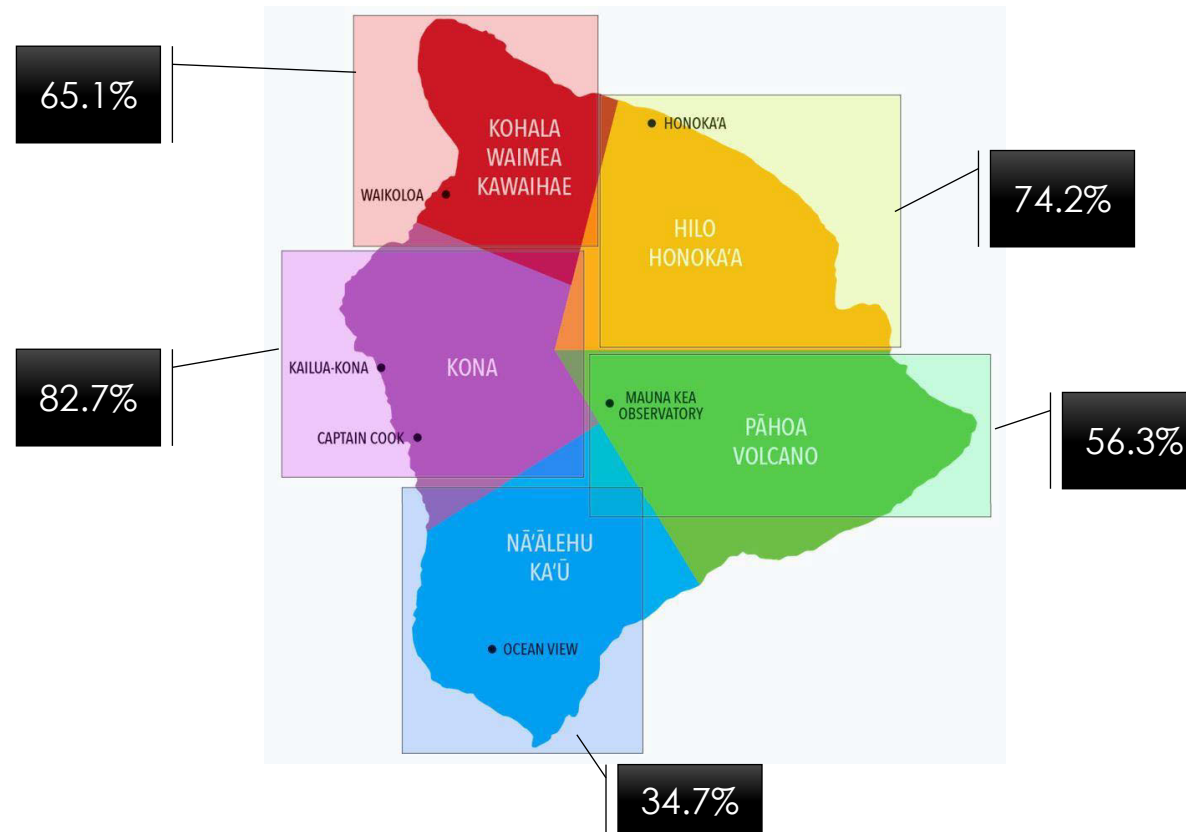
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



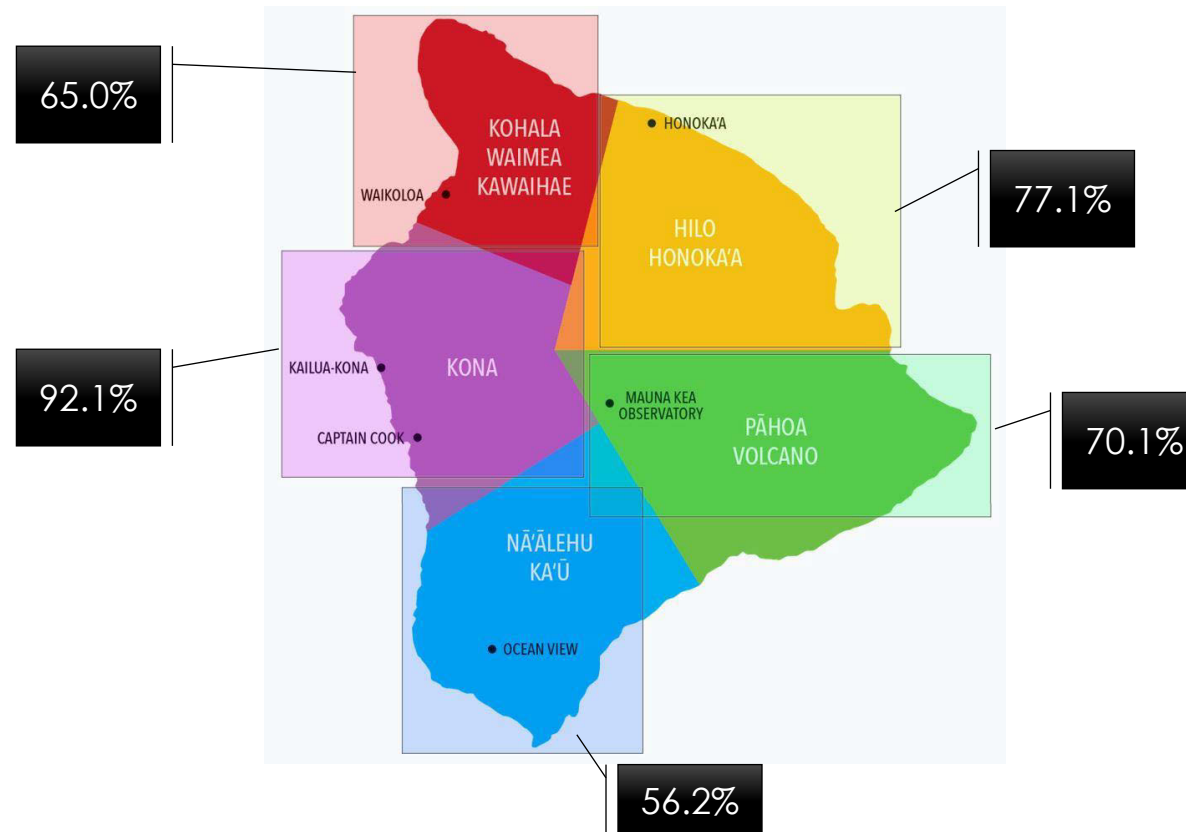
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



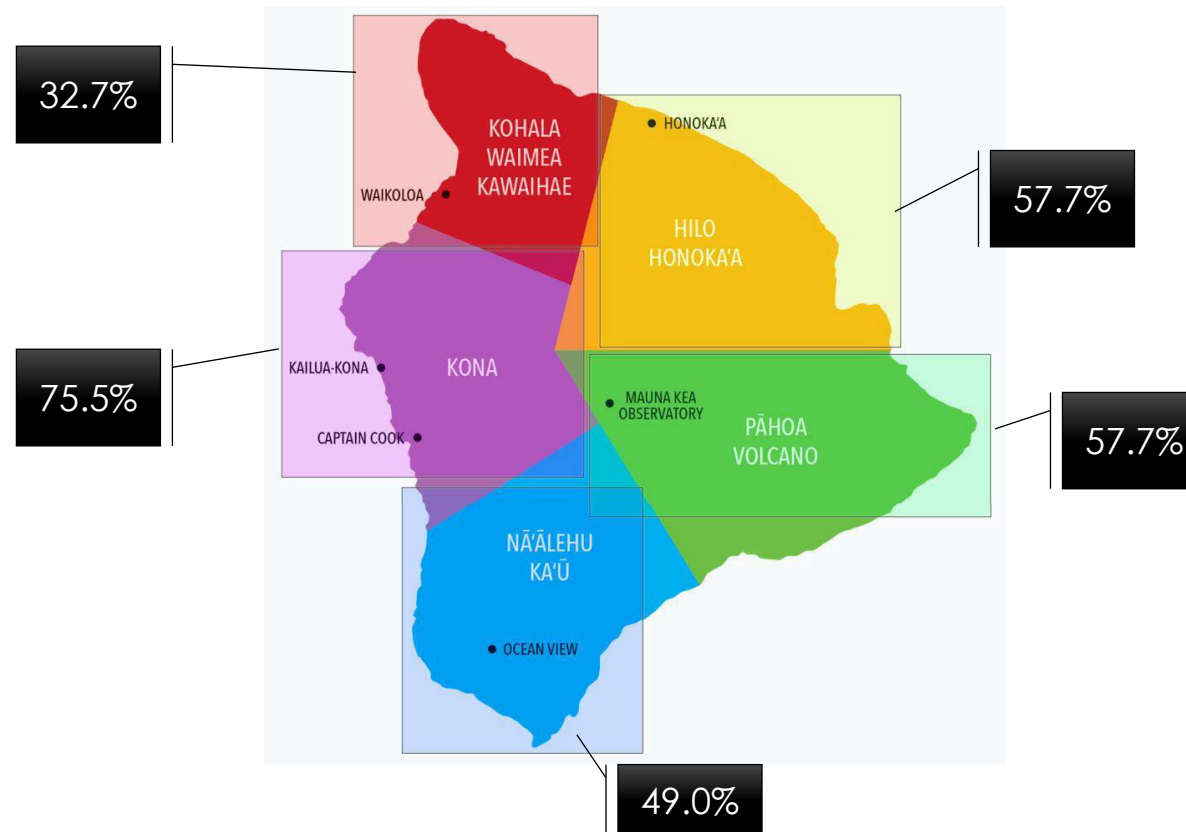
AREAS VISITED ISLAND OF HAWAI'I JAPAN



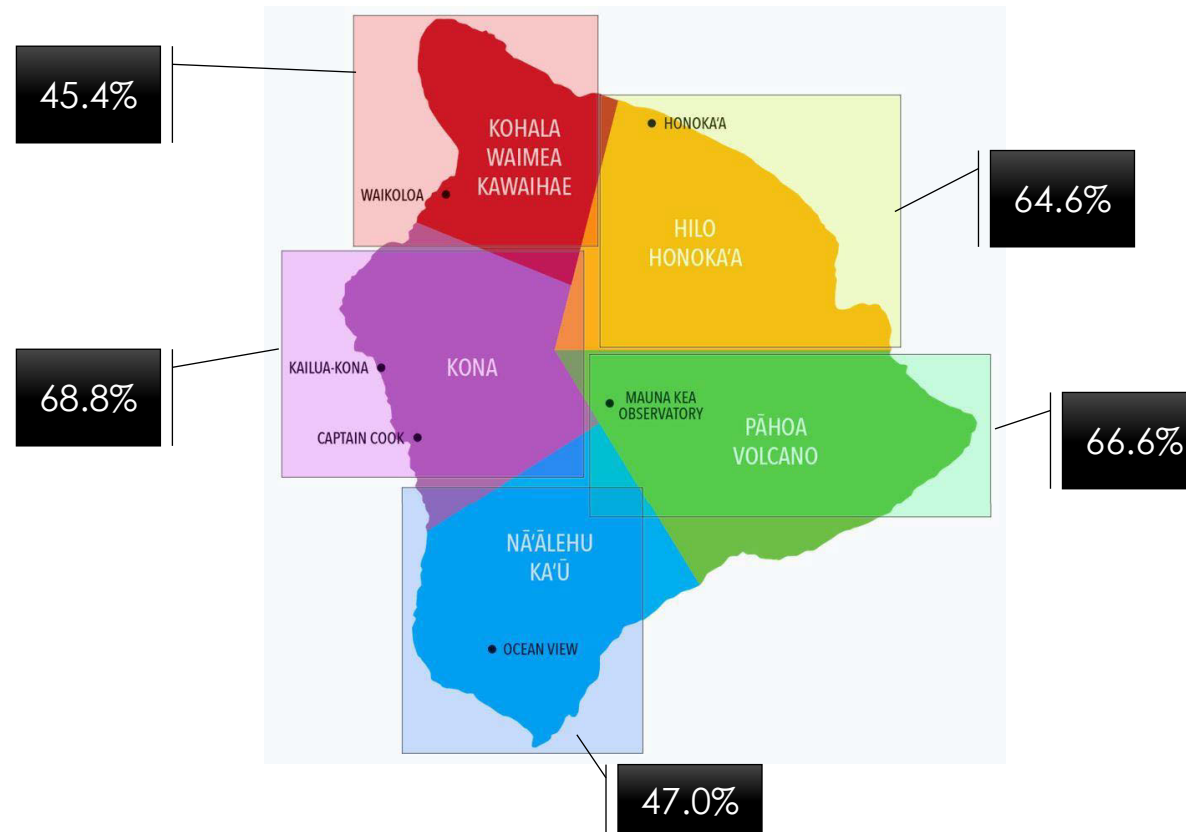
AREAS VISITED ISLAND OF HAWAI'I CANADA



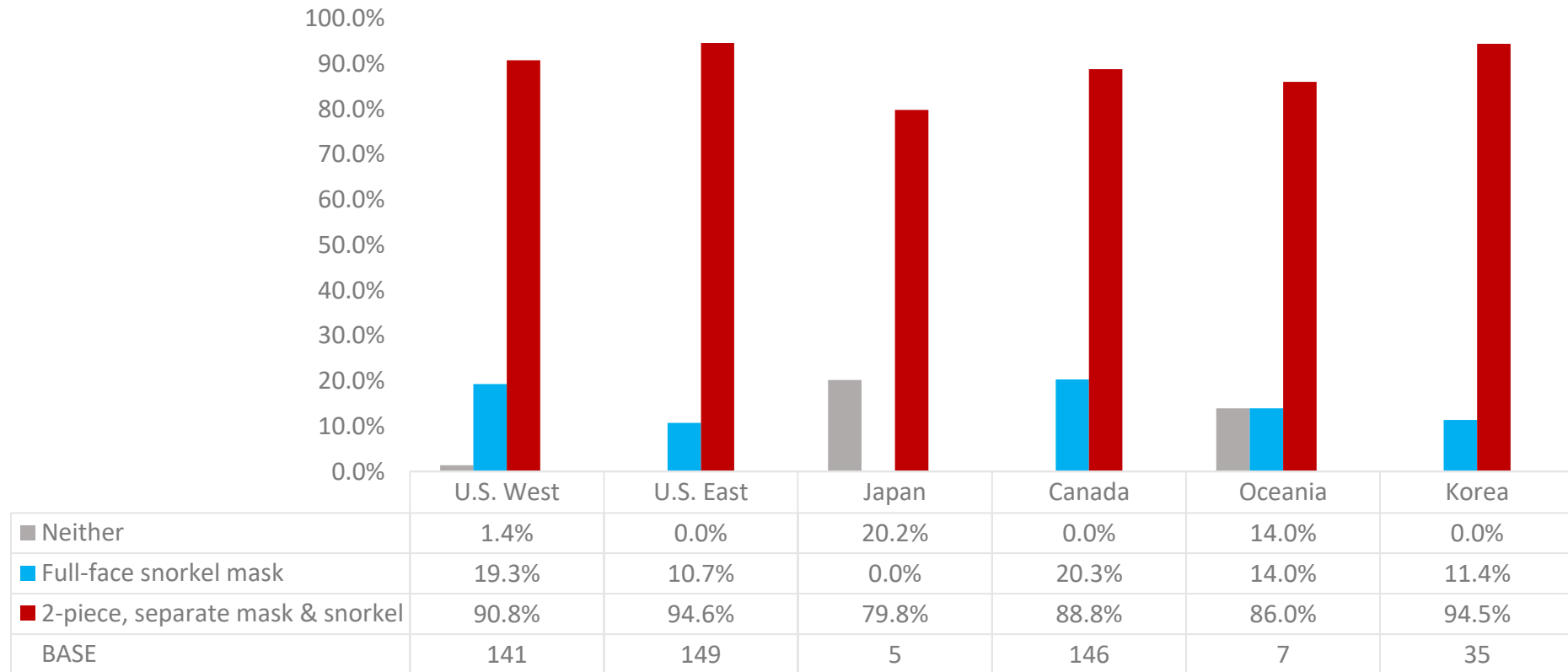
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



AREAS VISITED ISLAND OF HAWAI'I KOREA



SNORKELING EQUIPMENT USED - ISLAND OF HAWAI‘I

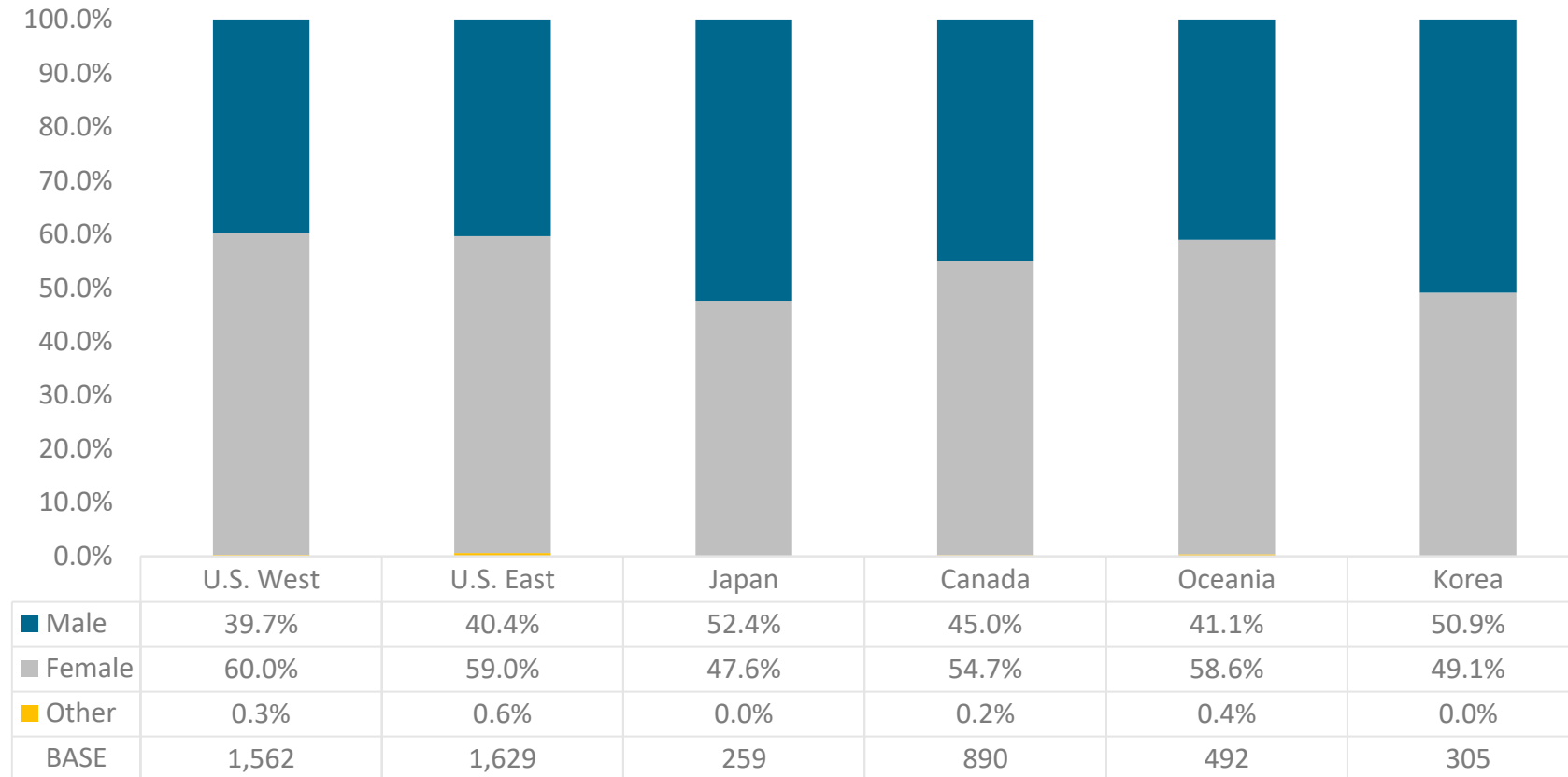


SNORKELING OCEAN SAFETY – ISLAND OF HAWAII

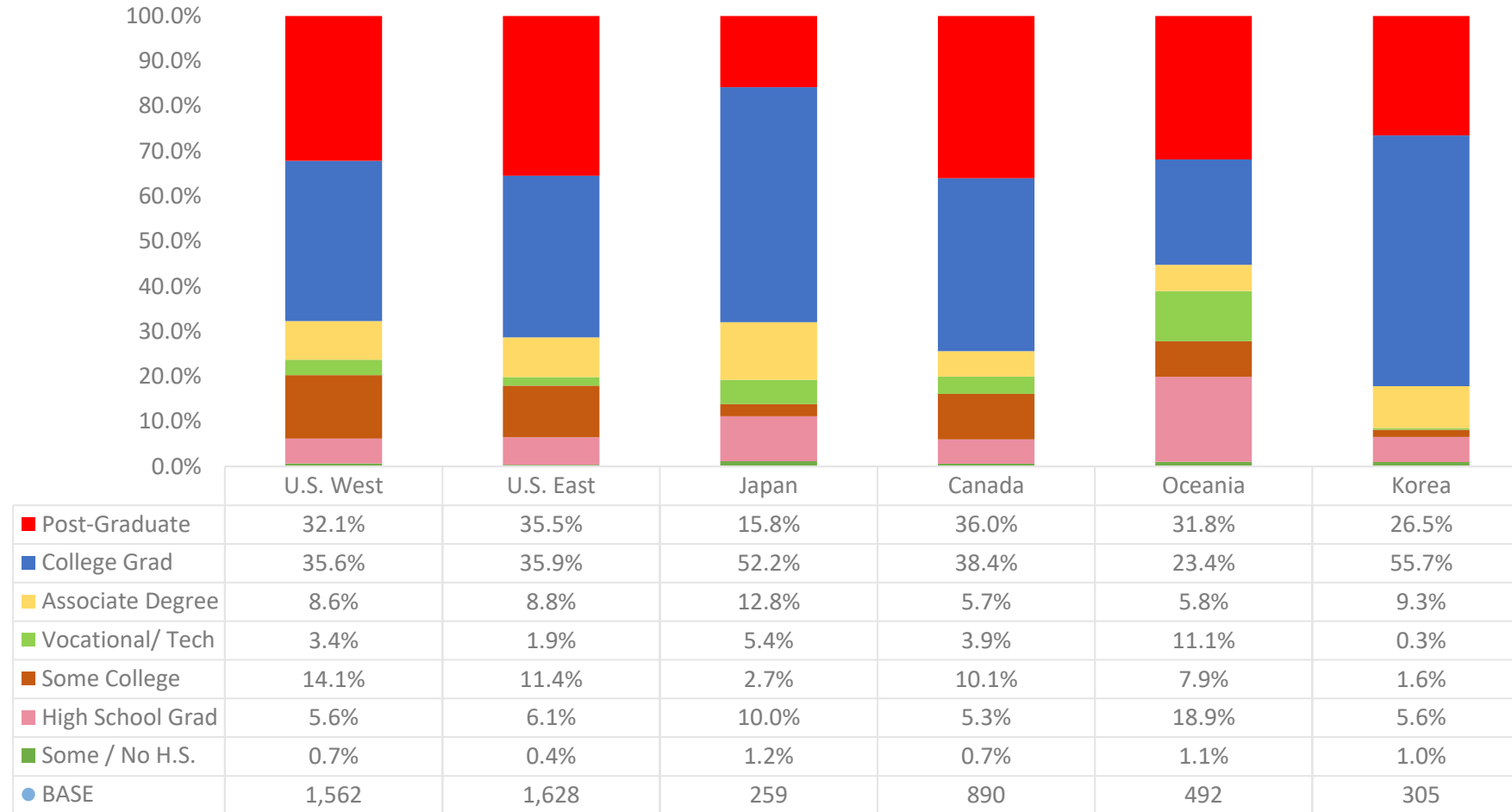
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
Did not have to be assisted or rescued	98.5%	99.3%	75.9%	100.0%	100.0%	100.0%
Yes, needed assistance – using 2-piece mask & snorkel	0.7%	0.7%	24.1%	0.0%	0.0%	0.0%
Yes, while doing another type of ocean activity	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	139	149	4	146	6	35

Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania
< \$40,000	4.1%	5.1%	4.6%	6.3%
\$40,000 to \$59,999	5.0%	7.3%	6.1%	8.6%
\$60,000 to \$79,999	8.4%	10.1%	8.7%	10.4%
\$80,000 to \$99,999	7.8%	7.6%	9.1%	9.5%
\$100,000 to \$124,999	12.4%	11.7%	13.0%	14.2%
\$125,000 to \$149,999	11.5%	11.1%	12.4%	11.2%
\$150,000 to \$174,999	11.1%	10.7%	10.9%	10.6%
\$175,000 to \$199,999	7.6%	6.6%	9.0%	5.0%
\$200,000 to \$249,999	11.0%	9.3%	11.2%	9.4%
\$250,000 +	21.2%	20.4%	14.8%	14.9%

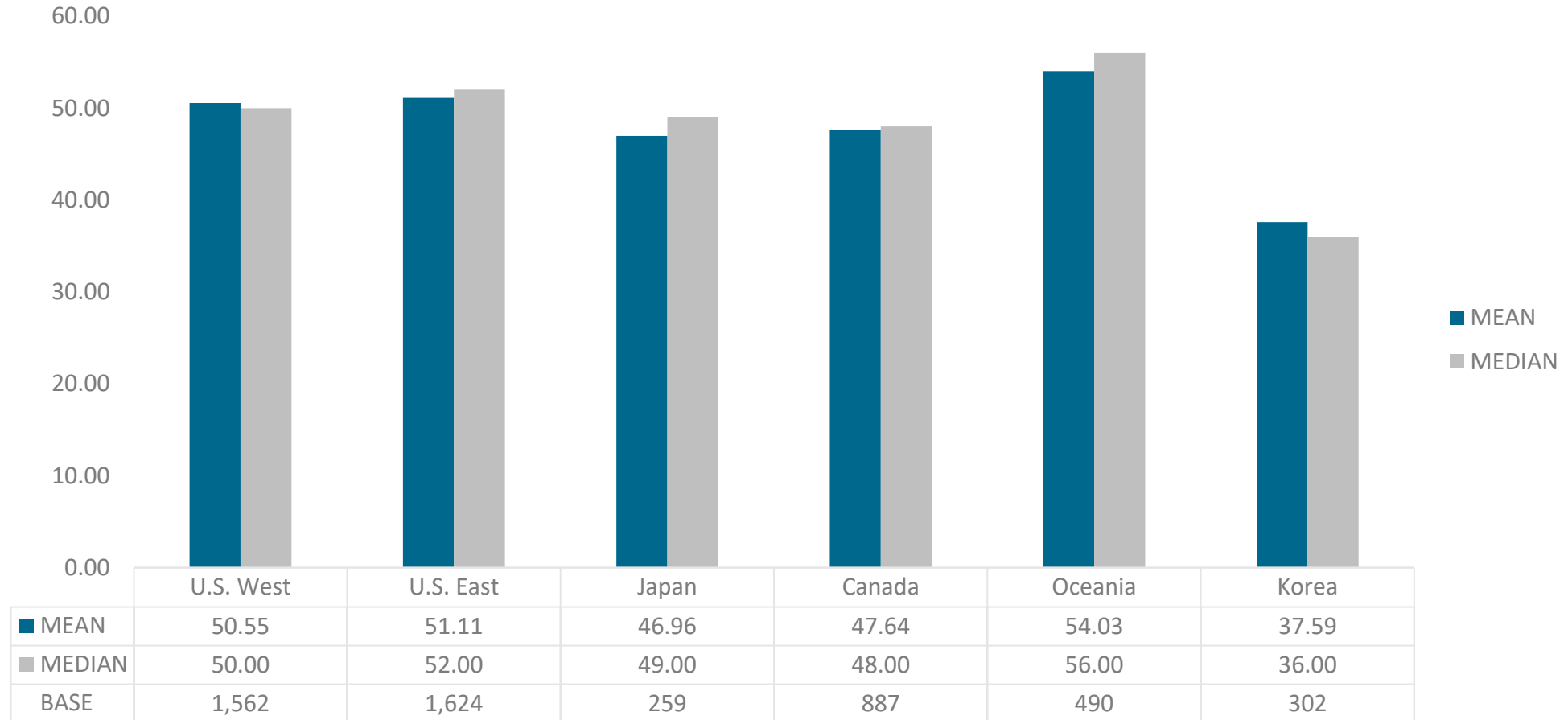
VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	13.1%
¥3.5 - ¥4.5 million	8.2%
¥4.5 - ¥5.5 million	8.2%
¥5.5 - ¥6.5 million	9.4%
¥6.5 - ¥7.5 million	5.8%
¥7.5 - ¥8.5 million	9.0%
¥8.5 - ¥10.0 million	9.4%
¥10.0 - ¥15.0 million	16.4%
¥15.0 - ¥20.0 million	9.9%
¥20.0 million +	10.7%

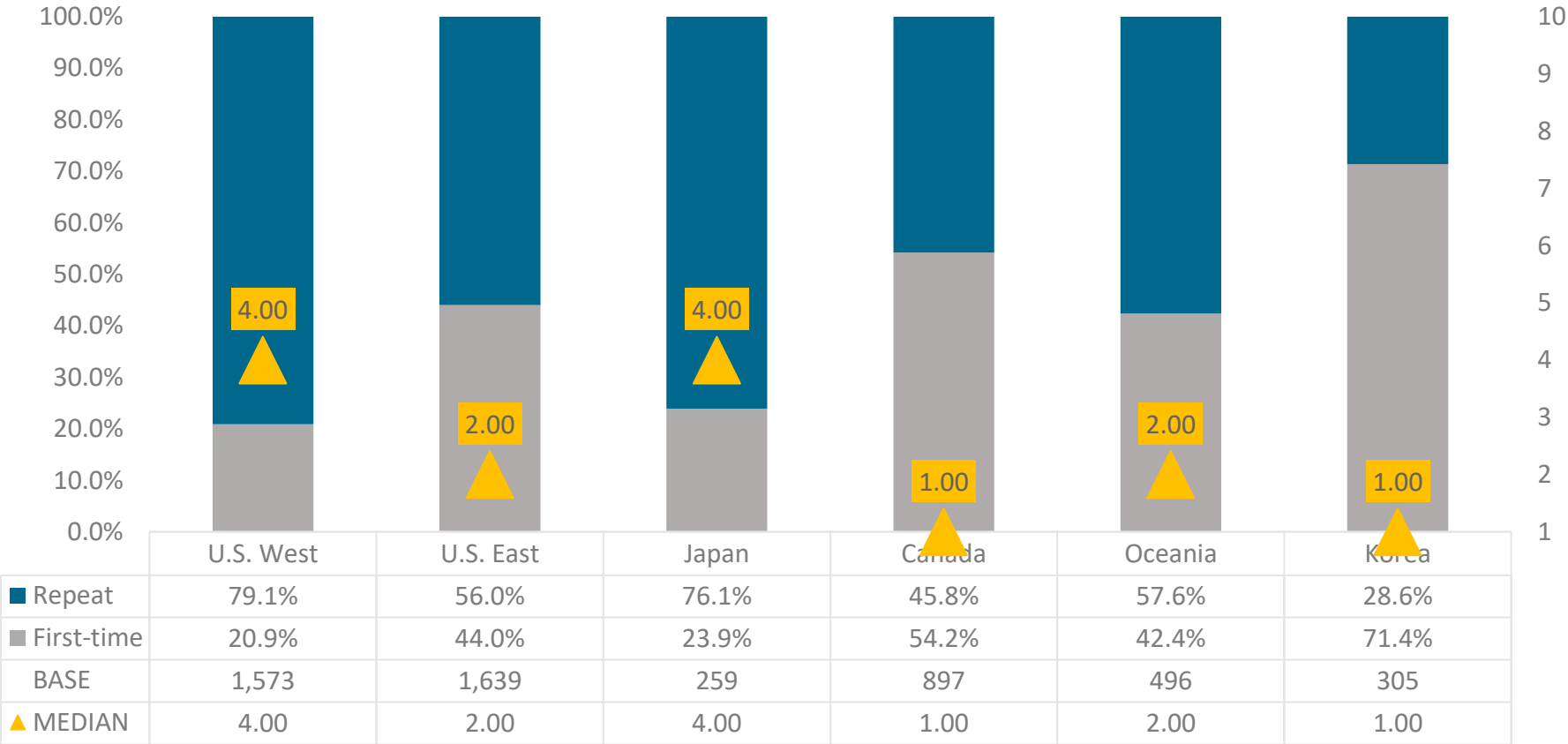
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	8.7%
₩16,305,000-27,173,999	3.9%
₩27,174,000-38,041,999	9.3%
₩38,042,000-48,911,999	7.2%
₩48,912,000-59,781,999	6.0%
₩59,782,000-70,652,999	9.5%
₩70,653,000-81,520,999	7.7%
₩81,521,000-92,390,999	5.6%
₩92,391,000-103,259,999	7.1%
₩103,260,000-149,999,999	15.6%
₩150,000,000-199,999,999	6.1%
₩200,000,000+	13.3%

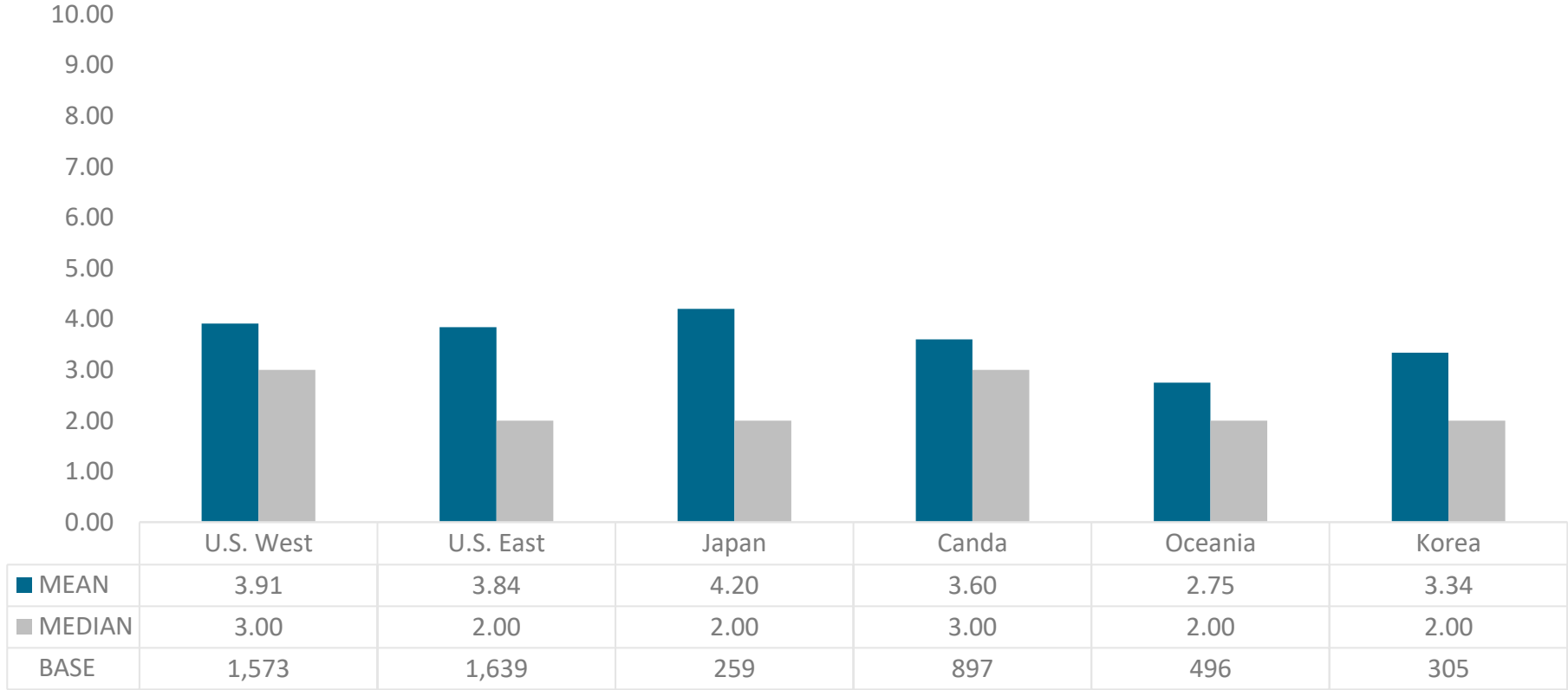
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea
My spouse	58.6%	59.5%	52.8%	58.6%	58.8%	66.1%
Other adult members of my family	33.1%	30.9%	25.9%	28.9%	18.3%	22.3%
My child(ren)/ grandchild(ren) under 18	32.0%	25.9%	18.2%	34.0%	19.7%	24.6%
My friends/ associates	15.3%	12.3%	12.3%	13.2%	10.6%	9.2%
Myself only (traveled alone/ no one else)	8.5%	10.5%	15.5%	7.1%	15.1%	7.3%
My girlfriend/ boyfriend	6.6%	5.8%	3.5%	8.2%	3.4%	1.0%
Same gender partner	0.9%	1.0%	0.4%	1.0%	0.4%	0.0%

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 table summarizes the number of surveys completed for the island of O‘ahu.

MMA	Completed	Margin of Error±
U.S. West	744	3.59
U.S. East	1,050	3.02
Japan	243	6.29
Canada	551	4.18
Oceania	479	4.48
Korea	286	5.79
China	37	16.11
All MMAs	3,390	1.68

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

MMA	Completed	Margin of Error +
U.S. West	377	5.05
U.S. East	410	4.84
Japan	3	56.58
Canada	193	7.05
Oceania	16	24.50
Korea	13	27.18
China	2	69.30
All MMAs	1,014	3.08

METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MAUI

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

MMA	Completed	Margin of Error +
U.S. West	354	5.21
U.S. East	408	4.85
Japan	4	49.00
Canada	170	7.52
Oceania	25	19.60
Korea	23	20.43
China	1	98.00
All MMAs	985	3.12

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

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

MMA	Completed	Margin of Error +
U.S. West	251	6.19
U.S. East	349	5.25
Japan	23	20.43
Canada	273	5.93
Oceania	39	15.69
Korea	70	11.71
China	5	43.83
All MMAs	1,010	3.08