

# VISITOR SATISFACTION STUDY QUARTER 4, 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 seven visitor markets who recently completed a trip to Hawai'i. Statistics presented in this Quarter 4, 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 and China.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	1,559	2.48	16.64
U.S. East	1,589	2.46	17.12
Japan	229	6.48	20.97
Canada	897	3.27	28.81
Oceania	313	5.54	14.18
Korea	268	5.99	42.81
China	43	14.94	4.40
All visitor markets	4,898	1.40	17.64

# 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 visitors from the U.S., Japan, Canada, Oceania, Korea and China 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.

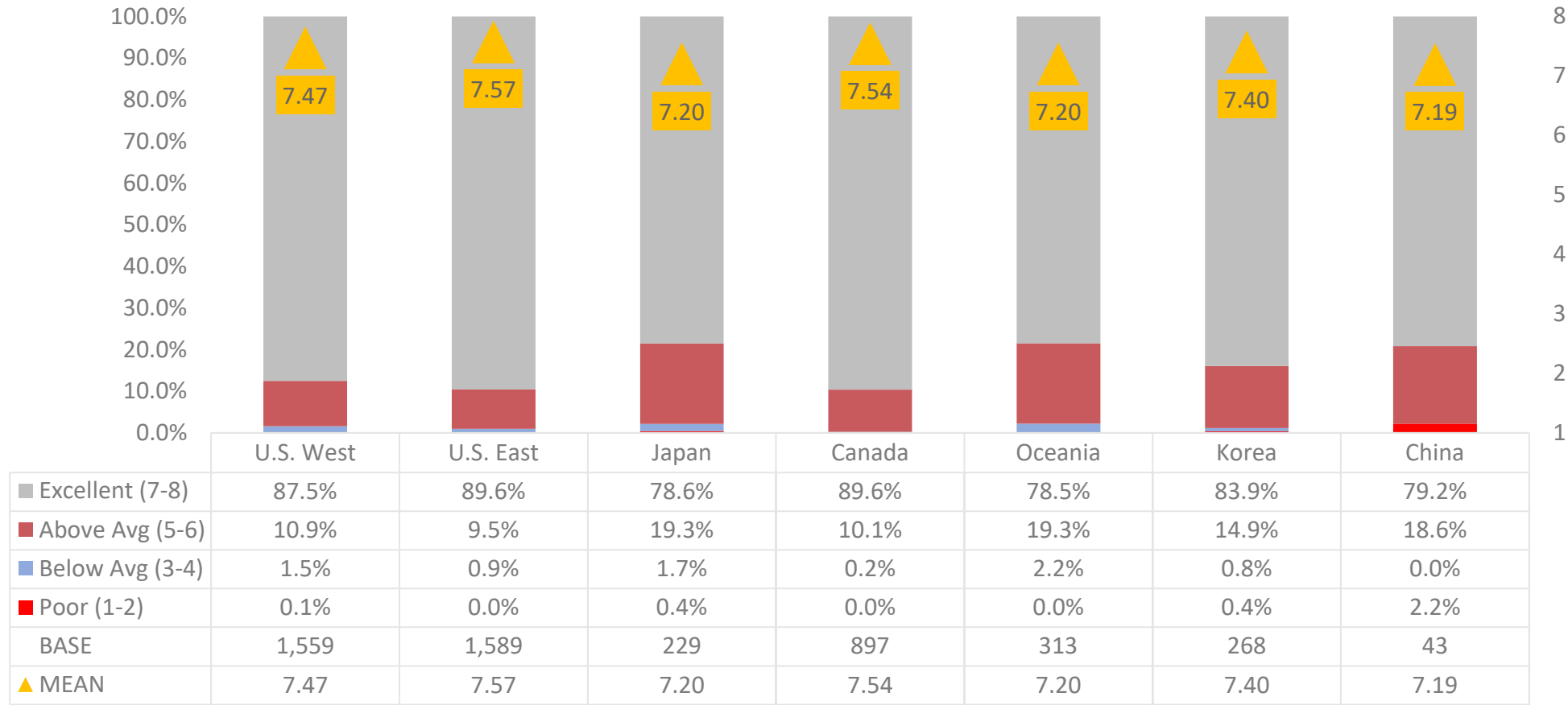
Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 4, 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.*

# Section 1 – Visitor Satisfaction

# Satisfaction - State of Hawai'i by Visitor Market

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



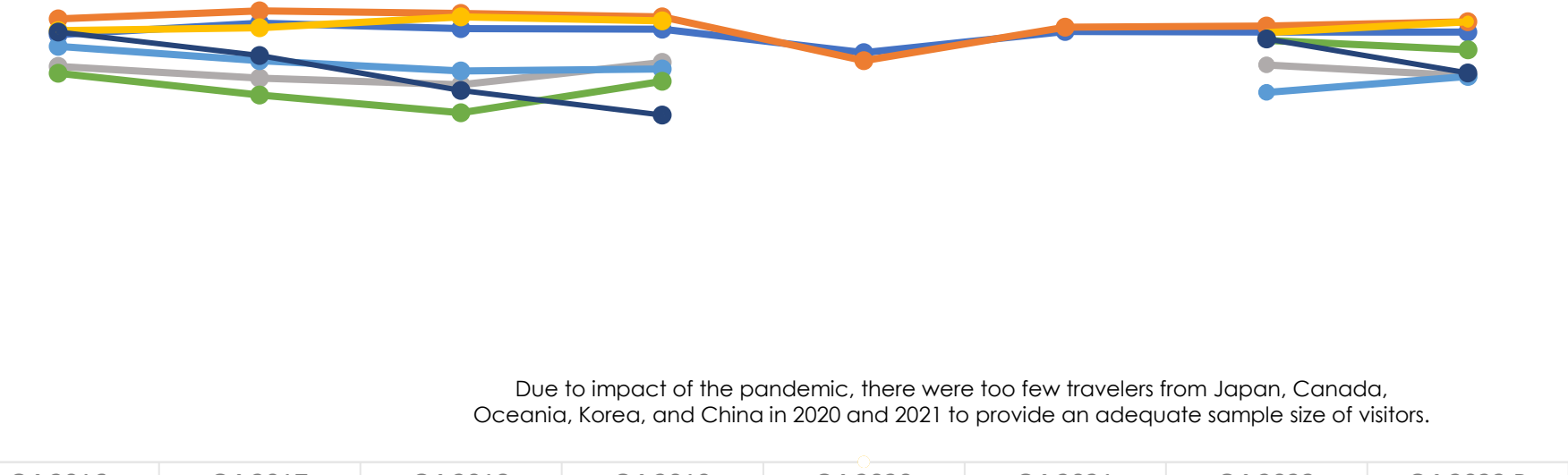
# Satisfaction - State of Hawai'i by Visitor Market

- **Gender:** Female respondents from **U.S. West, U.S. East** and **Canada** gave higher satisfaction scores than male respondents from these visitor markets.
- **Education:** Travelers from **Japan** with a college degree gave higher satisfaction scores for their trip than those without a college degree.
- **Travel party size:** Visitors from **Japan** who were visiting the state in larger travel parties of two or more gave statistically higher satisfaction scores compared to those visitors from this market who were traveling alone.
- **Islands visited:** Travelers from **U.S. West** who visited multiple islands gave statistically higher satisfaction scores compared to those whose trip consisted of visiting just one island.
- **Trips to Hawai'i:** First-time visitors from **Japan** gave statistically higher satisfaction scores compared to repeat visitors.

# 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%

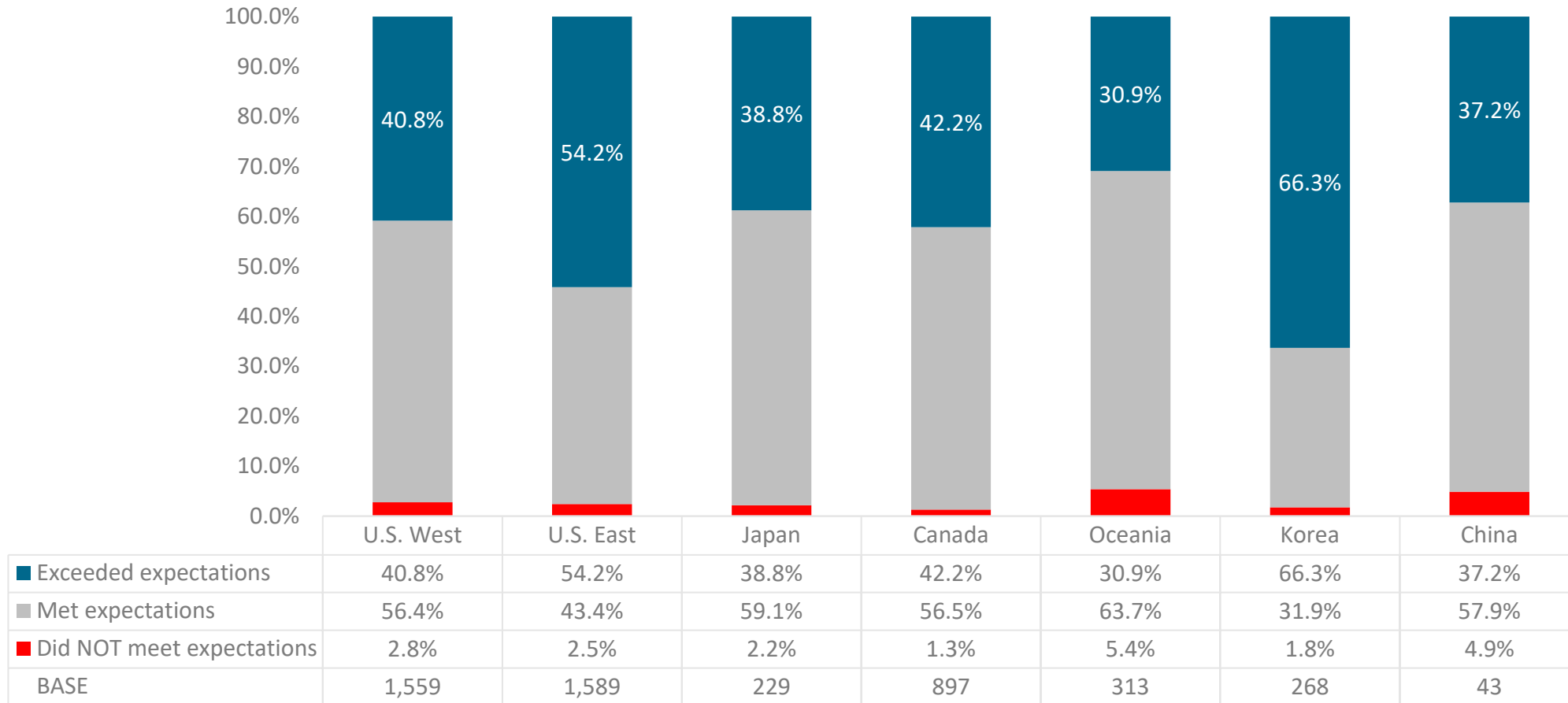


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	87.0%	89.3%	88.2%	88.1%	83.3%	87.6%	87.5%	87.5%
U.S. East	90.2%	91.8%	91.3%	90.6%	81.7%	88.5%	88.7%	89.6%
Japan	80.5%	78.1%	76.8%	81.3%			80.8%	78.6%
Canada	87.8%	88.4%	90.6%	89.8%			87.4%	89.6%
Oceania	84.6%	81.7%	79.6%	80.0%			75.2%	78.5%
Korea	79.1%	74.7%	71.1%	77.5%			85.8%	83.9%
China	87.5%	82.7%	75.6%	70.6%			86.1%	79.2%

P= Preliminary Data



# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

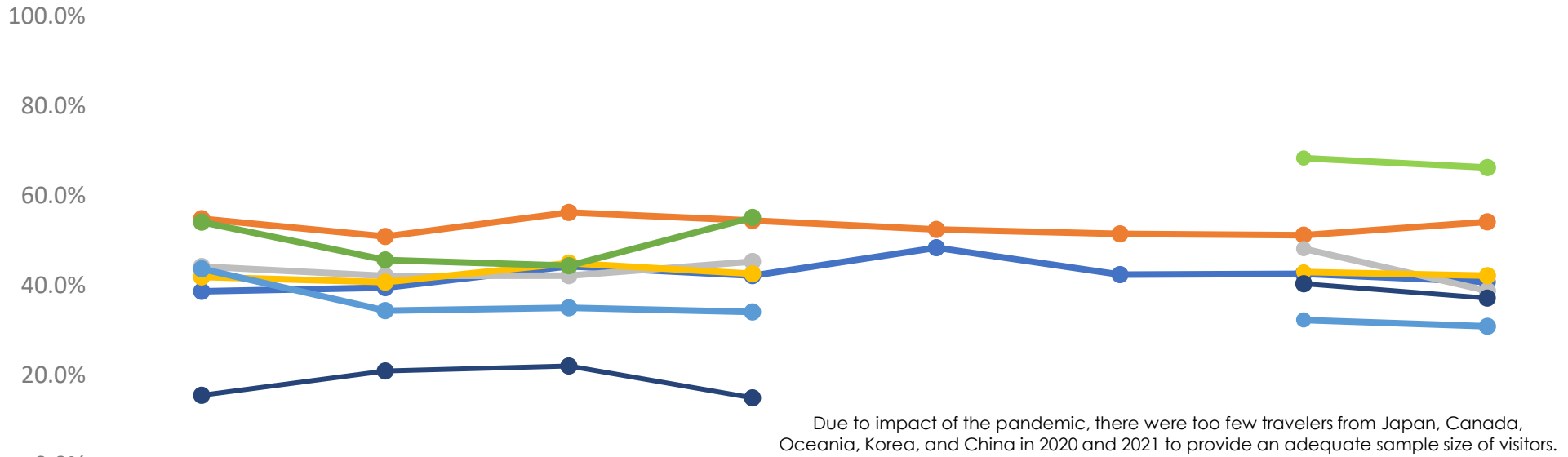


# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- **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, Canada, Korea and Japan.**
- **Age:** Younger respondents from **U.S. West** (between 18 – 49 years old) , **U.S. East** (between 18 – 49 years old), **Japan** (18-34), and **Canada** (between 18 – 49 years old) 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 **Japan** who traveled in larger travel parties (2+ persons) gave higher satisfaction scores compared to those who traveled by themselves.
- **Household income:** Visitors from **U.S. West** who reside in homes in the bottom income tier (<\$100K) were more satisfied with their trip in terms of exceeding expectations compared to those residing in homes earning in excess of \$150K.
- **Education:** College graduates from **Japan** were statistically more likely to feel their trip exceeded expectations.
- **Islands visited:** Visitors from **Canada** whose trip included stays on multiple islands were statistically more likely to feel their trip exceeded expectations.

# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

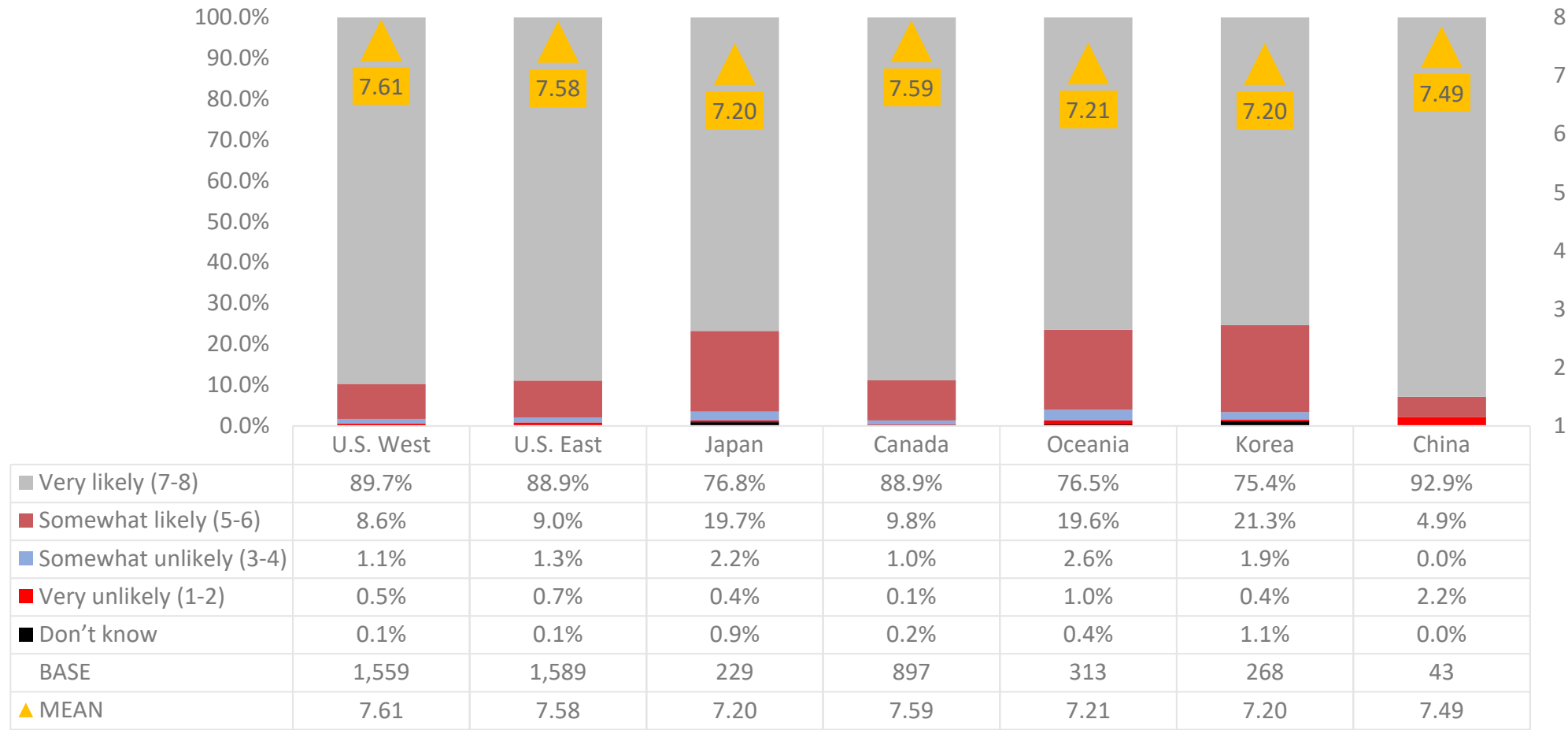


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	38.7%	39.5%	44.3%	42.2%	48.4%	42.4%	42.6%	40.8%
U.S. East	54.9%	50.9%	56.3%	54.5%	52.5%	51.5%	51.2%	54.2%
Japan	44.2%	42.1%	42.2%	45.3%			48.2%	38.8%
Canada	41.9%	40.7%	45.0%	42.6%			43.0%	42.2%
Oceania	43.7%	34.4%	35.0%	34.1%			32.3%	30.9%
Korea	54.1%	45.7%	44.4%	55.2%			68.4%	66.3%
China	15.5%	20.9%	22.0%	14.9%			40.4%	37.2%

P= Preliminary Data

# BRAND/ DESTINATION - ADVOCACY

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

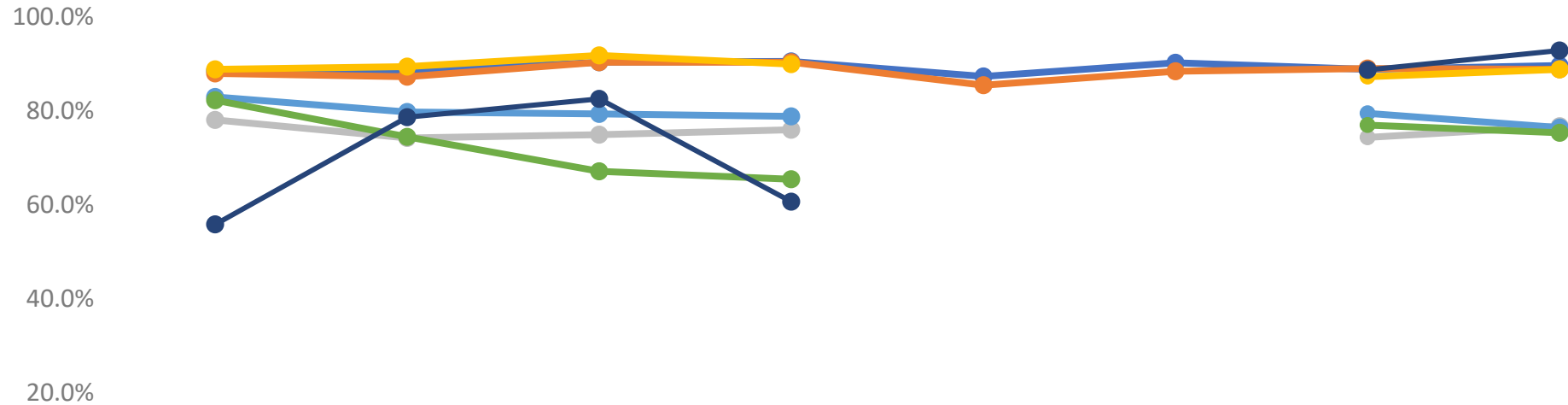


# BRAND/ DESTINATION - ADVOCACY

- **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.
- **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 **Japan** were more likely to recommend the state compared to those without a college degree. Conversely, those without a college degree from **Canada** were more likely to recommend the state compared to visitors with a college degree from this visitor market.
- **Travel party size:** Visitors in travel parties of three or more from **U.S. West** were more likely to recommend the state to others compared to those traveling on their own.

# BRAND/ DESTINATION - ADVOCACY

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



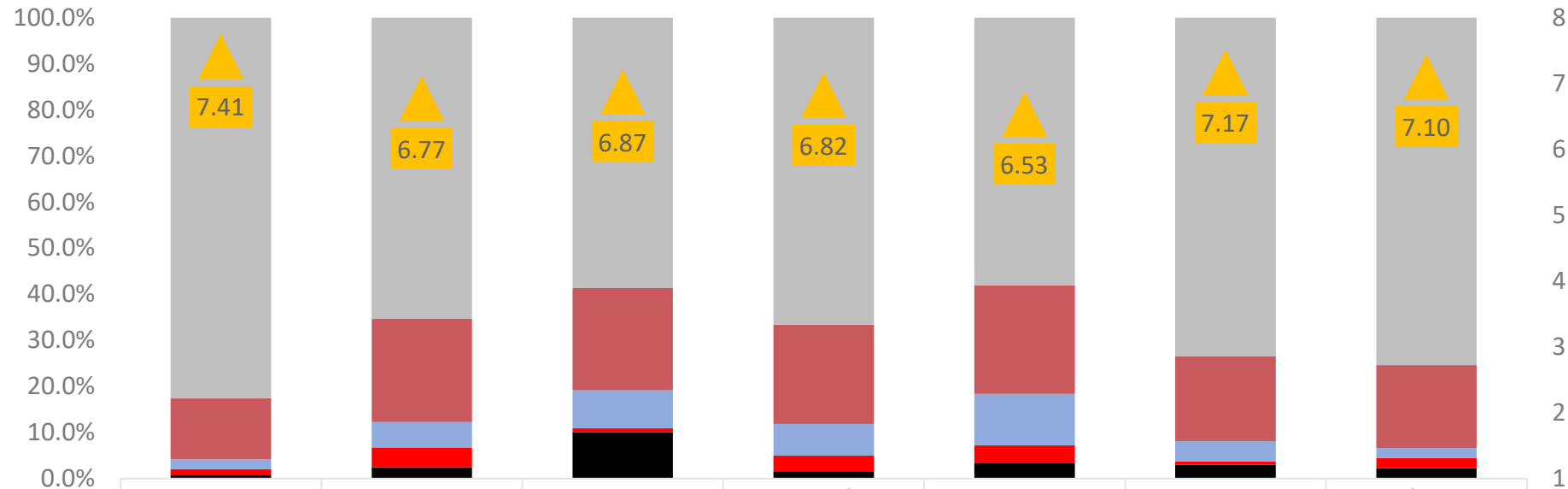
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	88.6%	88.4%	90.4%	90.6%	87.4%	90.3%	88.9%	89.7%
U.S. East	88.0%	87.3%	90.4%	90.4%	85.5%	88.5%	89.1%	88.9%
Japan	78.1%	74.3%	75.0%	76.0%			74.4%	76.8%
Canada	88.9%	89.5%	91.9%	90.0%			87.3%	88.9%
Oceania	83.0%	79.8%	79.4%	78.9%			79.5%	76.5%
Korea	82.3%	74.5%	67.2%	65.5%			77.0%	75.4%
China	55.9%	78.7%	82.6%	60.7%			88.8%	92.9%

P= Preliminary Data

# LIKELIHOOD OF RETURN VISIT

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



	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Very likely (7-8)	82.6%	65.4%	58.6%	66.6%	58.0%	73.5%	75.5%
Somewhat likely (5-6)	13.2%	22.4%	22.2%	21.6%	23.6%	18.4%	18.0%
Somewhat unlikely (3-4)	2.2%	5.5%	8.2%	6.9%	11.1%	4.4%	2.2%
Very unlikely (1-2)	1.4%	4.3%	0.9%	3.4%	3.9%	0.7%	2.2%
Don't know	0.7%	2.5%	10.0%	1.6%	3.3%	3.0%	2.2%
BASE	1,559	1,589	229	897	313	268	43
MEAN	7.41	6.77	6.87	6.82	6.53	7.17	7.10

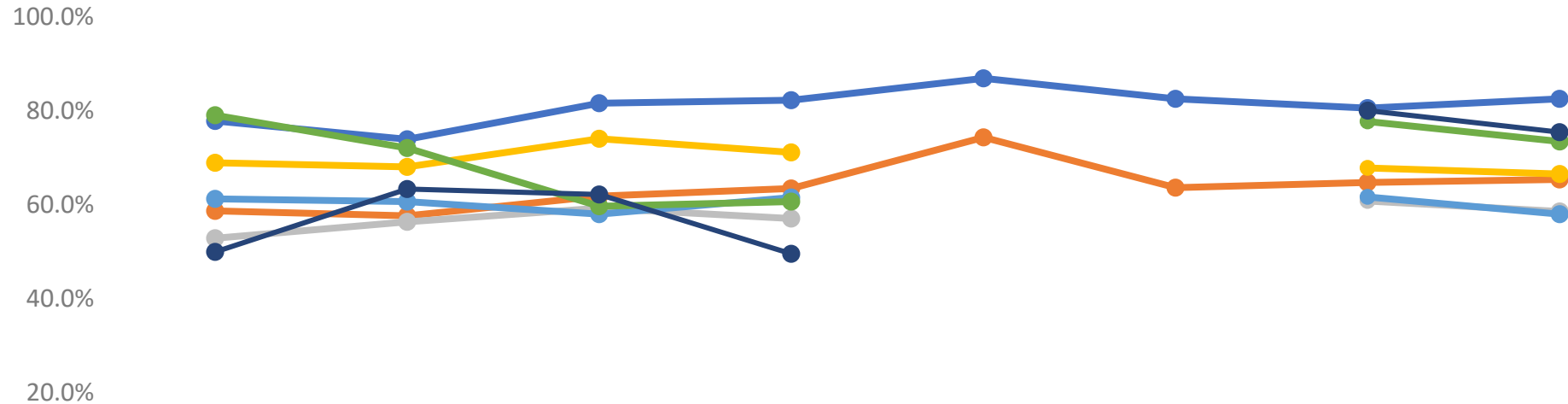
# LIKELIHOOD OF RETURN VISIT

- ***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. 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:*** Younger travelers (<35 years old) from **Japan** were less likely to return to the state compared to older travelers from this visitor market.
- ***Travel party size:*** Those traveling to the state by themselves from **U.S. West** and **U.S. East** were statistically more likely to indicate a return trip is likely.



# 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.

	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	77.9%	74.0%	81.7%	82.3%	87.0%	82.6%	80.6%	82.6%
U.S. East	58.7%	57.7%	61.9%	63.5%	74.4%	63.7%	64.8%	65.4%
Japan	52.9%	56.4%	59.3%	57.1%			60.8%	58.6%
Canada	69.0%	68.1%	74.1%	71.2%			67.9%	66.6%
Oceania	61.3%	60.7%	58.0%	61.6%			61.7%	58.0%
Korea	79.1%	72.1%	59.7%	60.7%			77.8%	73.5%
China	50.0%	63.4%	62.2%	49.6%			80.1%	75.5%

P= Preliminary Data

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

Q4 2022	Q4 2023 P
54.4% Too expensive	40.7% Too expensive
34.9% Too crowded/ congested/ traffic	34.0% Want to go someplace new
28.6% Want to go someplace new	32.5% Poor value
24.5% Poor value	18.4% Too crowded/ congested/ traffic
18.6% Too commercialized/ overdeveloped	15.2% Unfriendly people/ felt unwelcome
12.8% No reason to return/ nothing new	13.7% Too commercialized/ overdeveloped
11.8% Other financial obligations	13.4% No reason to return/ nothing new
11.8% Unfriendly people/ felt unwelcome	13.1% Other financial obligations
11.4% Flight too long	12.7% Poor health/ age
11.4% Five years is too soon	11.6% Flight too long

P= Preliminary Data

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

Q4 2022	Q4 2023 P
55.8% Too expensive	46.1% Too expensive
40.6% Flight too long	38.0% Flight too long
36.9% Want to go someplace new	36.9% Want to go someplace new
19.4% Poor value	17.4% Other financial obligations
15.6% Five years is too soon	15.4% Poor value
14.7% Too crowded/ congested/ traffic	14.9% Too crowded/ congested/ traffic
13.9% Other financial obligations	11.8% Too commercialized/ overdeveloped
12.2% Too commercialized/ overdeveloped	11.3% Five years is too soon

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS JAPAN

Q4 2022*	Q4 2023 P**
61.9% Too expensive	65.9% Too expensive
54.0% Want to go someplace new	22.6% Other financial obligations
46.0% Too commercialized/ overdeveloped	18.1% Want to go someplace new
46.0% Five years is too soon	13.6% Five years is too soon
27.0% Too crowded/ congested/ traffic	11.3% Poor health/ age
27.0% Poor service	
19.0% Flight too long	
19.0% Poor value	
19.0% Other financial obligations	
19.0% No reason to return/ nothing new	
19.0% Unfriendly people/ felt unwelcome	
19.0% Poor health/ age	

\*Caution small base (n=1 respondent) in Q4 2022.

\*\*Caution small base (n=44 respondents) in Q4 2023.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

Q4 2022	Q4 2023 P
65.9% Too expensive	58.8% Too expensive
39.6% Want to go someplace new	38.2% Want to go someplace new
36.2% Flight too long	31.6% Flight is too long
24.1% Poor value	23.4% Poor value
14.0% Five years is too soon	13.1% Other financial obligations
13.3% Too crowded/ congested/ traffic	
10.7% Other financial obligations	
10.2% Too commercialized/ overdeveloped	

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q4 2022	Q4 2023 P
62.5% Too expensive	60.7% Too expensive
51.7% Poor value	41.0% Want to go someplace new
34.1% Want to go someplace new	39.6% Poor value
21.8% Five years is too soon	28.4% Too commercialized/ overdeveloped
20.4% No reason to return/ nothing new	17.2% Too crowded/ congested/ traffic
18.7% Too commercialized/ overdeveloped	12.6% No reason to return/ nothing new
14.2% Flight too long	

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS KOREA

Q4 2022*	Q4 2023 P**
100% Too expensive	57.5% Too expensive
71.0% Poor value	35.8% Poor value
35.5% Want to go someplace new	27.2% Flight too long
29.0% Other financial obligations	22.8% No reason to return/ nothing new
26.6% Flight too long	21.7% Five years is too soon
26.6% Five years is too soon	21.7% Other financial obligations
26.6% No reason to return/ nothing new	18.5% Want to go someplace new
11.3% Too commercialized/ overdeveloped	

\*Caution small base (n=11 respondents) in Q4 2022.

\*\*Caution small base (n=22 respondents) in Q4 2023.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CHINA

Q4 2022*	Q4 2023 P**
100% Too expensive	33.3% Too expensive
100% Flight too long	33.3% Flight too long
100% Too crowded/ congested/ traffic	33.3% No reason to return/ nothing new
100% No reason to return/ nothing new	33.3% Unfriendly people/ felt unwelcome
	33.3% Crime/ safety concerns

\*Caution small base (n=1 respondent) in Q4 2022.

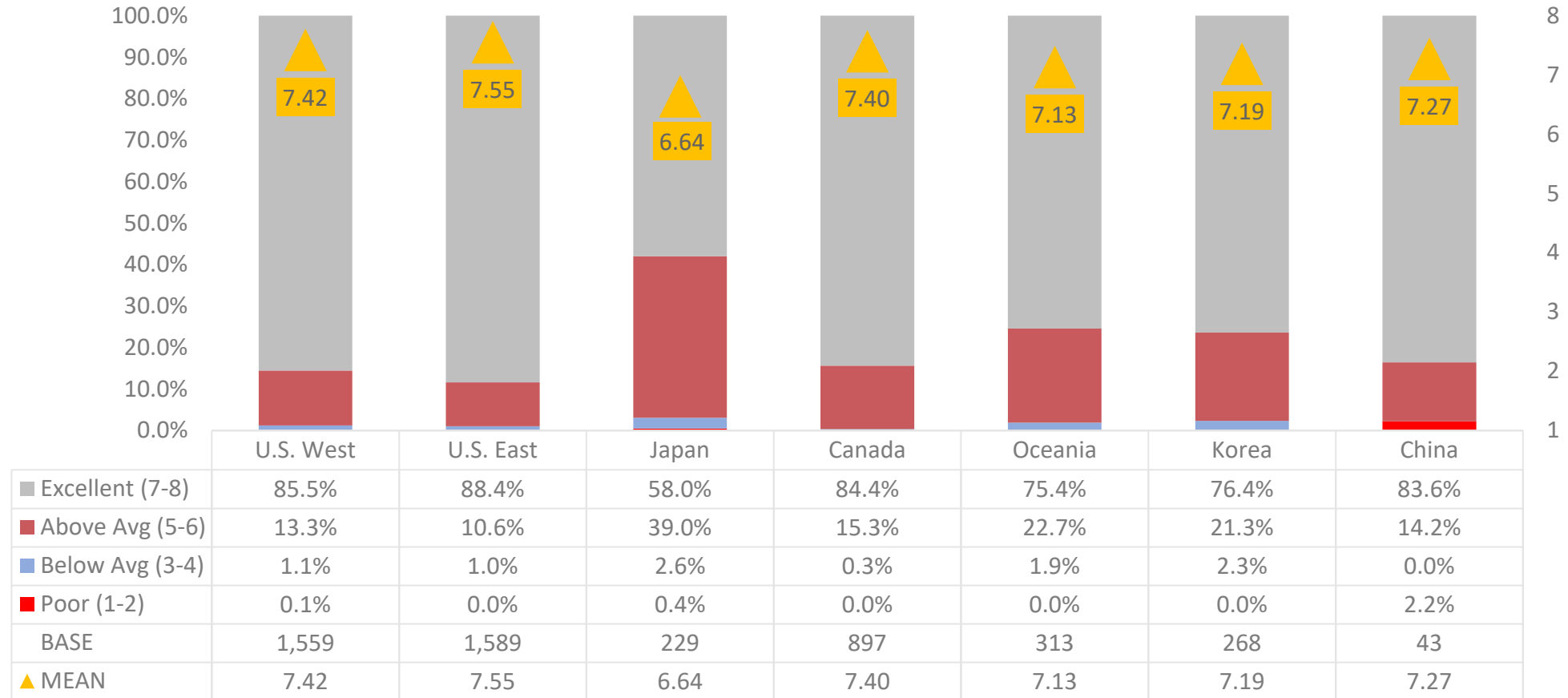
\*\*Caution small base (n=3 respondents) in Q4 2023.

P= Preliminary Data



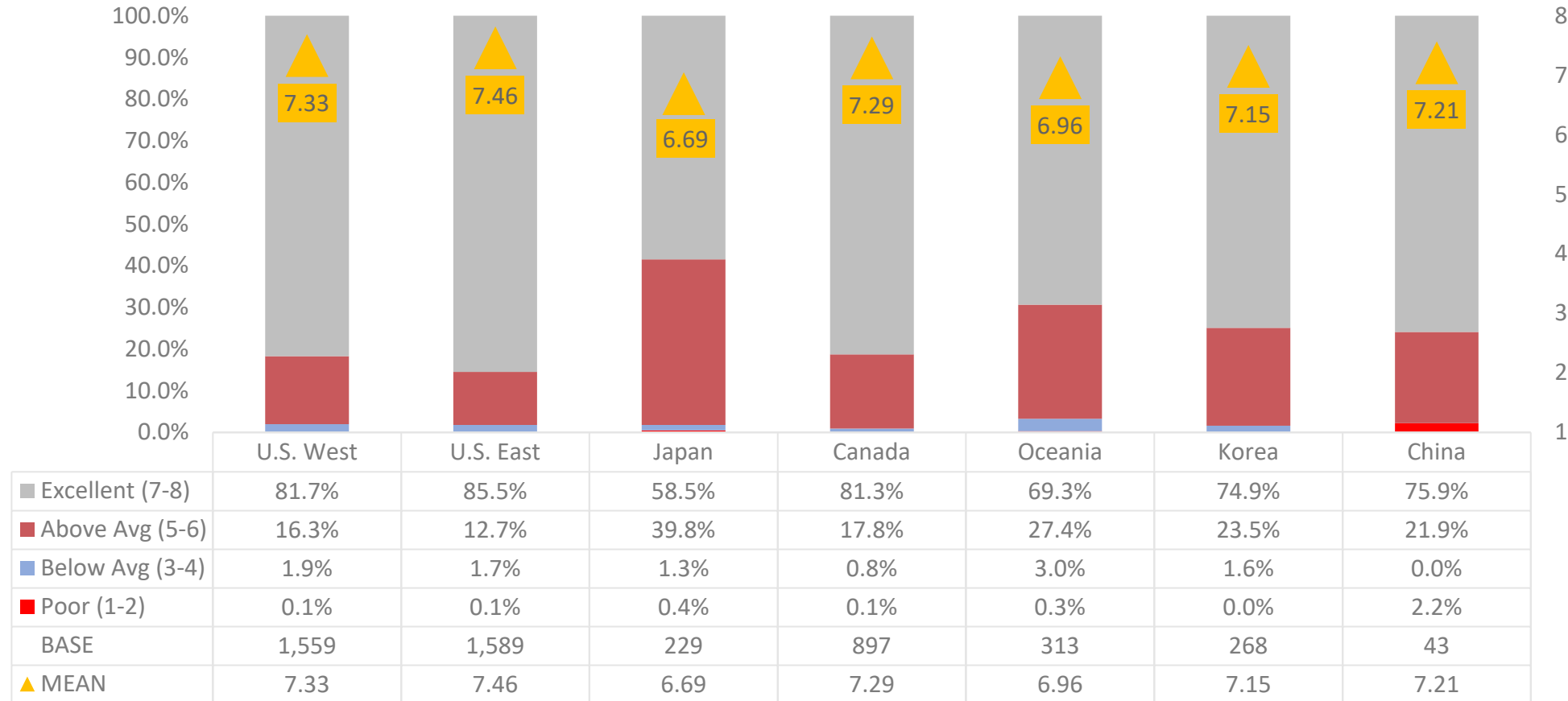
# OFFERING A VARIETY OF EXPERIENCES

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



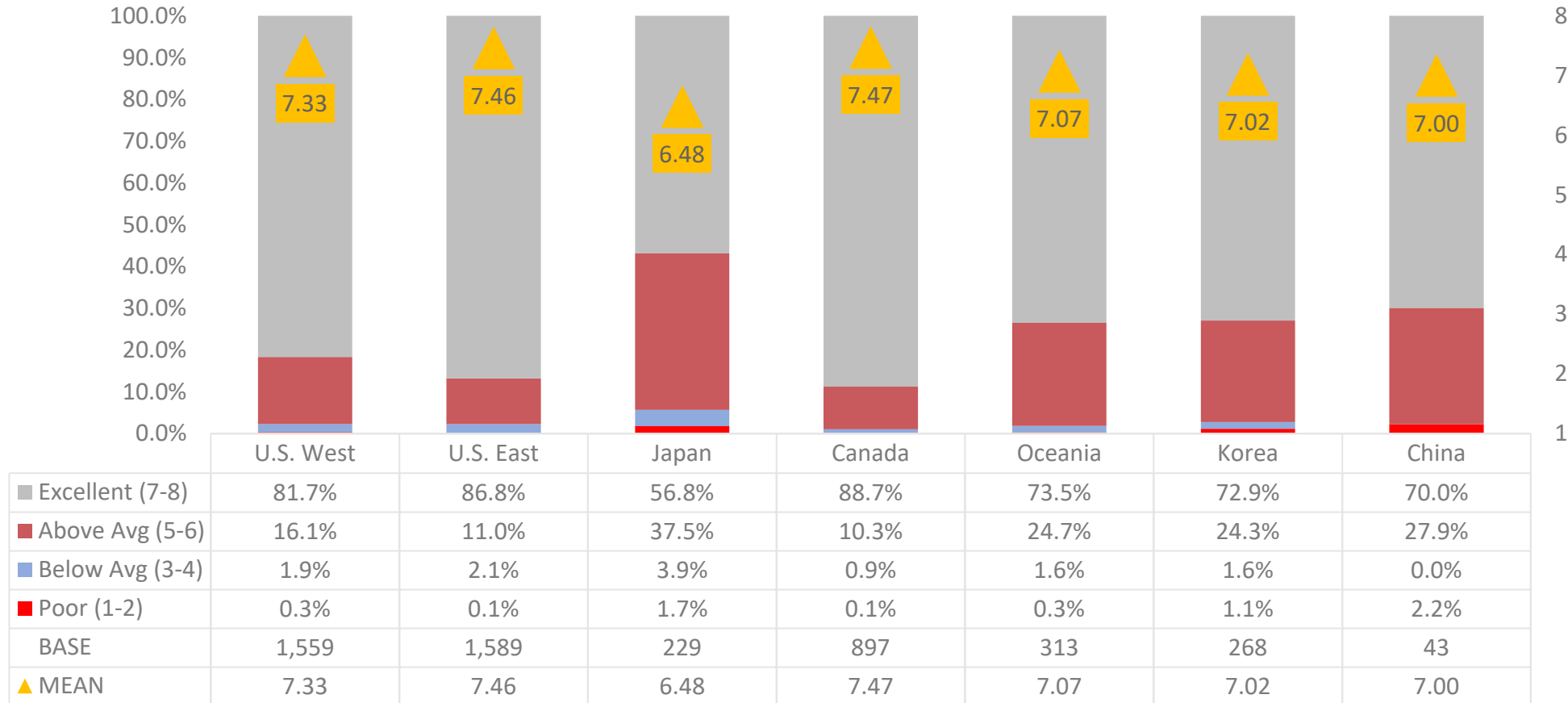
# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



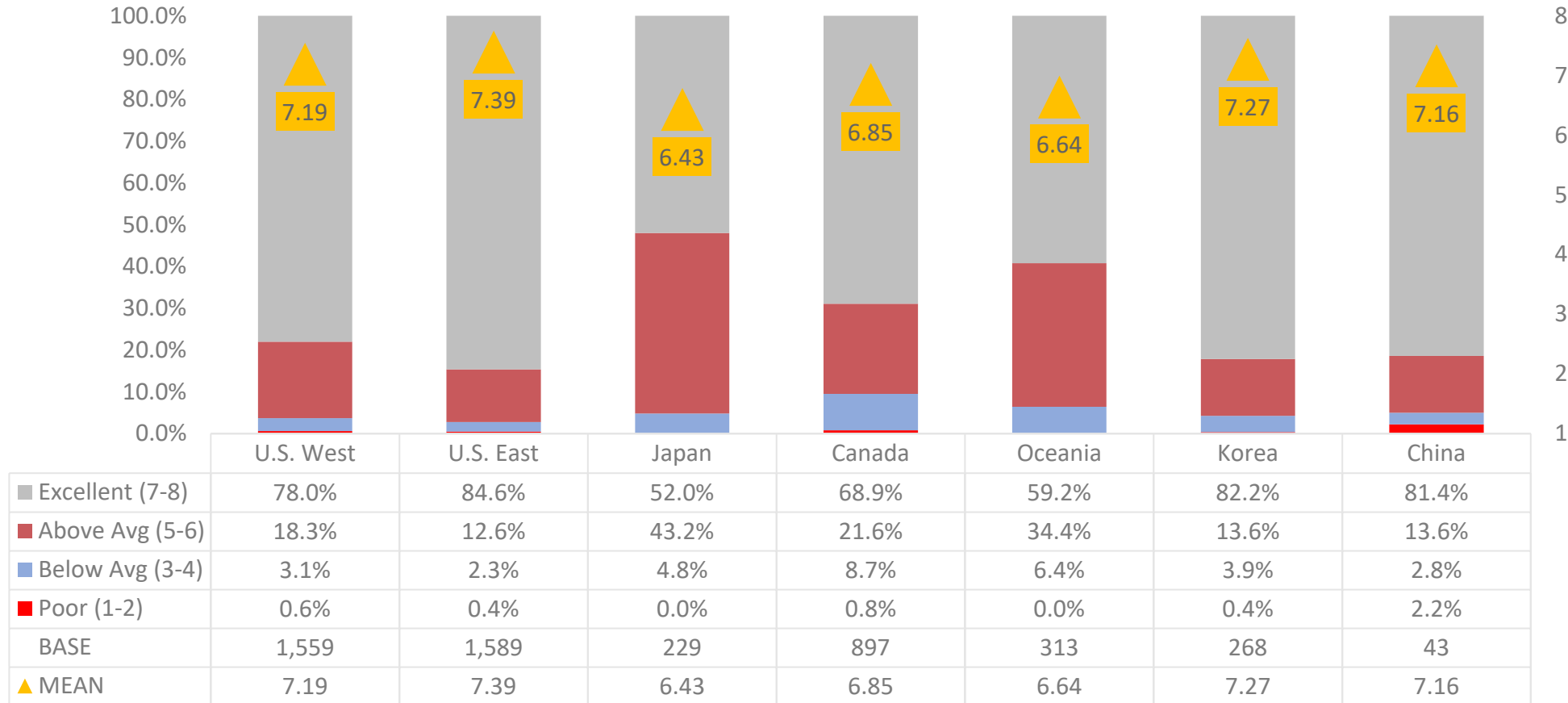
# SAFE AND SECURE DESTINATION

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



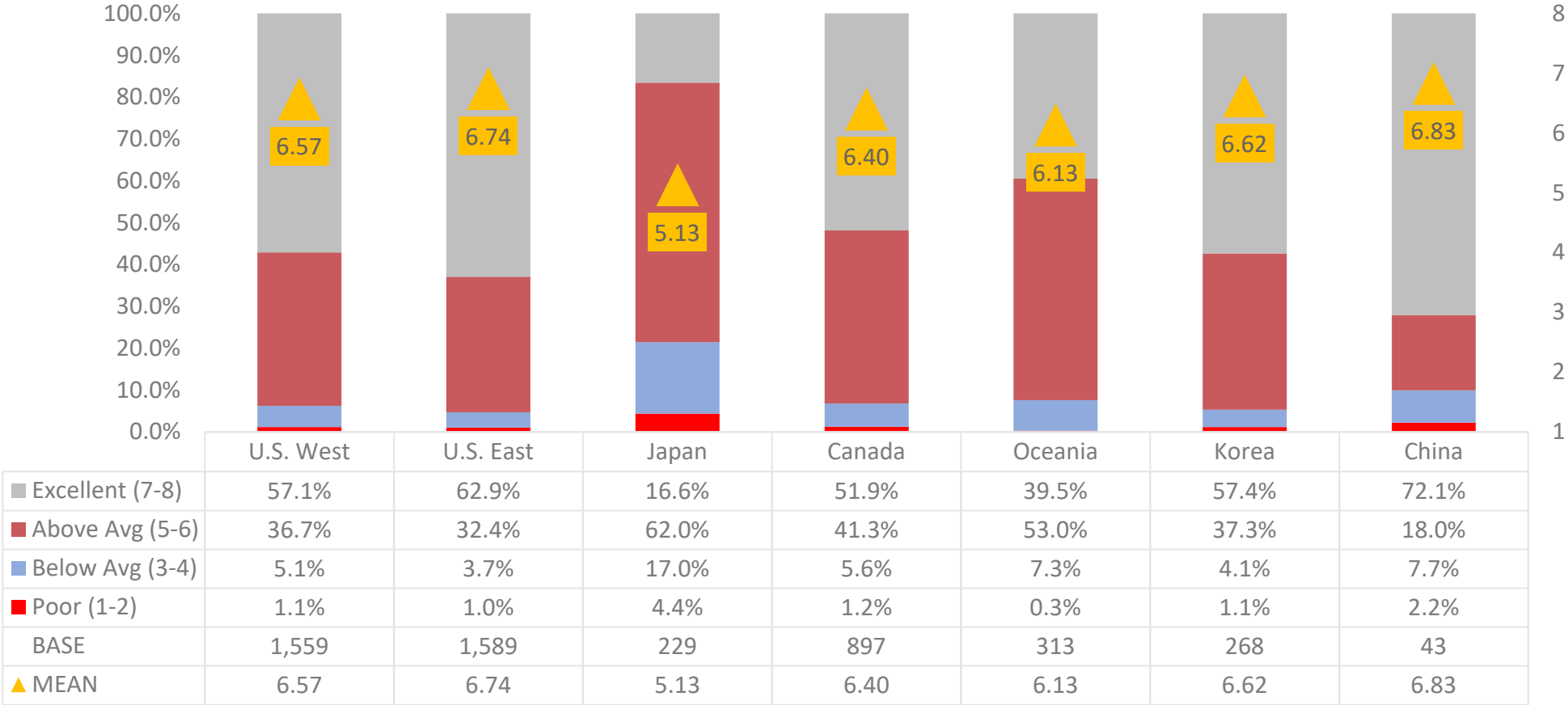
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	China
<b>TOTAL</b>	96.7%	98.5%	98.2%	99.2%	90.5%	99.6%	100.0%
<b>On own (self-guided)</b>	84.7%	81.5%	75.5%	86.9%	50.4%	82.0%	76.9%
<b>Helicopter ride/ airplane tour</b>	3.3%	7.0%	0.9%	5.9%	1.8%	4.3%	2.4%
<b>Boat tour/ submarine ride/ whale watching</b>	20.6%	28.6%	6.2%	21.6%	13.8%	32.9%	22.5%
<b>Visit towns/ communities</b>	54.1%	54.5%	34.3%	55.6%	28.1%	41.0%	31.9%
<b>Private limousine/ van tour/ tour bus</b>	5.5%	14.7%	11.1%	8.8%	20.9%	12.6%	15.4%
<b>Scenic views/ natural landmarks</b>	59.3%	68.7%	18.2%	63.6%	45.4%	65.1%	60.4%
<b>Movie/ TV/ film location tours</b>	4.4%	6.7%	4.9%	4.5%	9.5%	20.9%	17.1%

# ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	96.9%	96.1%	95.1%	98.4%	93.9%	97.7%	95.3%
<b>Beach/ sunbathing</b>	84.0%	82.9%	70.2%	88.8%	79.8%	86.2%	81.1%
<b>Bodyboarding</b>	8.8%	6.4%	0.9%	11.5%	3.0%	1.6%	3.0%
<b>Standup paddle boarding</b>	4.1%	3.6%	4.0%	4.2%	6.6%	5.0%	0.0%
<b>Surfing</b>	5.5%	5.9%	2.2%	8.3%	9.0%	11.6%	11.3%
<b>Canoeing/ kayaking</b>	5.5%	5.8%	2.2%	3.3%	2.2%	4.1%	4.7%
<b>Swimming in the ocean</b>	66.3%	60.5%	36.0%	76.1%	60.3%	54.9%	25.5%
<b>Snorkeling</b>	41.5%	37.4%	11.5%	48.1%	19.6%	56.1%	20.8%
<b>Freediving</b>	1.3%	0.8%	0.0%	1.0%	0.0%	0.7%	3.0%
<b>Windsurfing/ Kitesurfing</b>	0.2%	0.1%	0.4%	0.3%	0.0%	0.4%	0.0%
<b>Jet skiing/ Parasailing</b>	0.8%	1.0%	1.3%	0.8%	1.0%	2.1%	2.4%
<b>Scuba diving</b>	2.9%	2.3%	0.9%	2.4%	0.4%	0.7%	0.0%
<b>Fishing</b>	3.4%	2.4%	0.9%	2.7%	0.3%	1.5%	2.4%
<b>Golf</b>	7.0%	6.1%	5.4%	9.7%	0.6%	4.8%	2.4%



# ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	96.9%	96.1%	95.1%	98.4%	93.9%	97.7%	95.3%
<b>Running/ jogging/ fitness/ walking</b>	27.5%	26.2%	20.9%	30.1%	26.5%	13.5%	19.5%
<b>Cycling</b>	2.8%	3.2%	2.7%	6.8%	0.7%	3.5%	5.3%
<b>Spa</b>	9.6%	8.5%	3.5%	5.4%	6.5%	7.2%	5.3%
<b>Hiking</b>	40.5%	50.7%	23.5%	46.6%	22.0%	22.4%	52.7%
<b>Backpacking/ camping</b>	0.9%	1.3%	0.0%	1.9%	0.4%	4.0%	5.3%
<b>Agritourism</b>	12.7%	16.6%	5.3%	9.8%	8.2%	16.5%	24.8%
<b>Sports event or tournament</b>	2.4%	3.1%	0.9%	4.1%	0.9%	0.4%	2.4%
<b>Parks/ botanical gardens</b>	36.7%	41.3%	23.6%	38.9%	31.3%	22.5%	51.0%
<b>Waterparks</b>	1.4%	1.3%	0.9%	1.4%	1.1%	5.6%	2.4%
<b>Mountain tubing/ waterfall rappel</b>	1.7%	1.8%	0.0%	1.8%	0.6%	1.5%	0.0%
<b>Zip-lining</b>	4.3%	3.4%	0.0%	2.5%	1.4%	1.1%	0.0%
<b>Skydiving</b>	0.1%	0.3%	0.0%	0.2%	0.0%	1.1%	0.0%
<b>All-terrain vehicle (ATV)</b>	2.9%	5.0%	2.2%	3.0%	2.7%	9.2%	2.4%
<b>Horseback riding</b>	1.7%	1.5%	2.2%	0.8%	0.7%	0.0%	7.7%

# ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	98.9%	98.3%	96.9%	98.4%	99.3%	98.5%	100.0%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.6%	24.8%	13.3%	22.2%	14.1%	35.9%	52.0%
<b>Live music/ stage show</b>	26.6%	33.4%	16.9%	28.3%	23.1%	17.1%	22.5%
<b>Nightclub/ dancing/ bar/ karaoke</b>	6.4%	8.3%	2.2%	5.0%	6.3%	2.9%	2.4%
<b>Fine dining</b>	47.8%	45.8%	37.4%	38.9%	25.1%	55.7%	39.6%
<b>Family restaurant</b>	61.3%	55.3%	20.4%	60.5%	66.2%	44.7%	35.5%
<b>Fast food</b>	31.3%	32.8%	52.4%	38.7%	55.8%	59.9%	40.9%
<b>Food truck</b>	39.8%	41.7%	21.8%	40.1%	26.9%	65.3%	34.9%
<b>Café/ coffee house</b>	50.8%	50.4%	54.7%	51.6%	59.6%	74.8%	58.0%
<b>Ethnic dining</b>	26.5%	29.3%	6.7%	19.9%	12.5%	23.6%	30.8%
<b>Farm-to-table cuisine</b>	17.2%	21.3%	16.9%	12.6%	4.9%	2.8%	7.7%
<b>Prepared own meal</b>	48.5%	39.6%	20.5%	62.0%	21.4%	15.0%	23.8%

# ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	96.7%	96.2%	97.3%	98.2%	97.3%	98.2%	97.6%
<b>Malls/ department stores</b>	42.9%	43.9%	81.3%	55.7%	71.4%	81.3%	72.8%
<b>Designer boutiques</b>	16.9%	18.3%	13.3%	15.6%	13.7%	3.8%	13.1%
<b>Hotel/ resort stores</b>	33.6%	37.3%	31.6%	30.1%	39.0%	34.4%	18.9%
<b>Swap meet/ flea market</b>	16.4%	14.0%	2.7%	14.2%	5.8%	2.3%	5.3%
<b>Discount/ outlet stores</b>	12.0%	13.7%	21.4%	16.4%	32.4%	62.8%	7.7%
<b>Supermarkets</b>	62.0%	53.9%	51.2%	67.6%	46.0%	48.9%	46.2%
<b>Farmer's market</b>	37.7%	31.5%	16.0%	45.1%	13.1%	13.2%	30.2%
<b>Convenience stores</b>	50.7%	47.7%	52.0%	50.5%	59.8%	57.8%	59.7%
<b>Duty free stores</b>	3.8%	4.8%	23.1%	4.7%	10.5%	40.9%	19.5%
<b>Hawai'i-made products</b>	44.6%	50.3%	14.2%	46.4%	30.1%	30.3%	36.8%
<b>Local shops and artisans</b>	58.4%	59.7%	9.8%	58.2%	39.3%	21.4%	42.2%

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	66.8%	76.3%	53.8%	74.0%	71.5%	61.3%	72.2%
<b>Historic military sites and museums</b>	17.9%	28.2%	14.2%	20.7%	38.0%	23.9%	31.3%
<b>Historic Hawaiian sites and museums</b>	31.8%	37.7%	19.1%	33.1%	23.6%	12.9%	27.2%
<b>Other historical sites, museums, and homes</b>	13.6%	15.3%	7.1%	12.9%	13.4%	19.0%	20.1%
<b>Art museums</b>	2.0%	3.2%	2.7%	3.1%	5.3%	2.0%	10.1%
<b>Art galleries and exhibitions</b>	9.1%	9.4%	2.7%	9.9%	4.3%	1.6%	0.0%
<b>Lū'au/ Polynesian show/ hula show</b>	21.1%	35.4%	12.9%	27.0%	24.0%	17.9%	17.1%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.6%	6.2%	3.6%	5.1%	7.0%	4.2%	10.1%
<b>Play/ concert/ theatre</b>	3.0%	4.1%	3.1%	3.7%	2.5%	3.9%	4.7%
<b>Art/ craft fair</b>	12.7%	11.4%	3.1%	12.7%	5.0%	3.3%	6.0%
<b>Festival /event</b>	5.5%	6.0%	2.7%	6.9%	7.5%	3.4%	2.4%

# ACTIVITIES - TRANSPORTATION

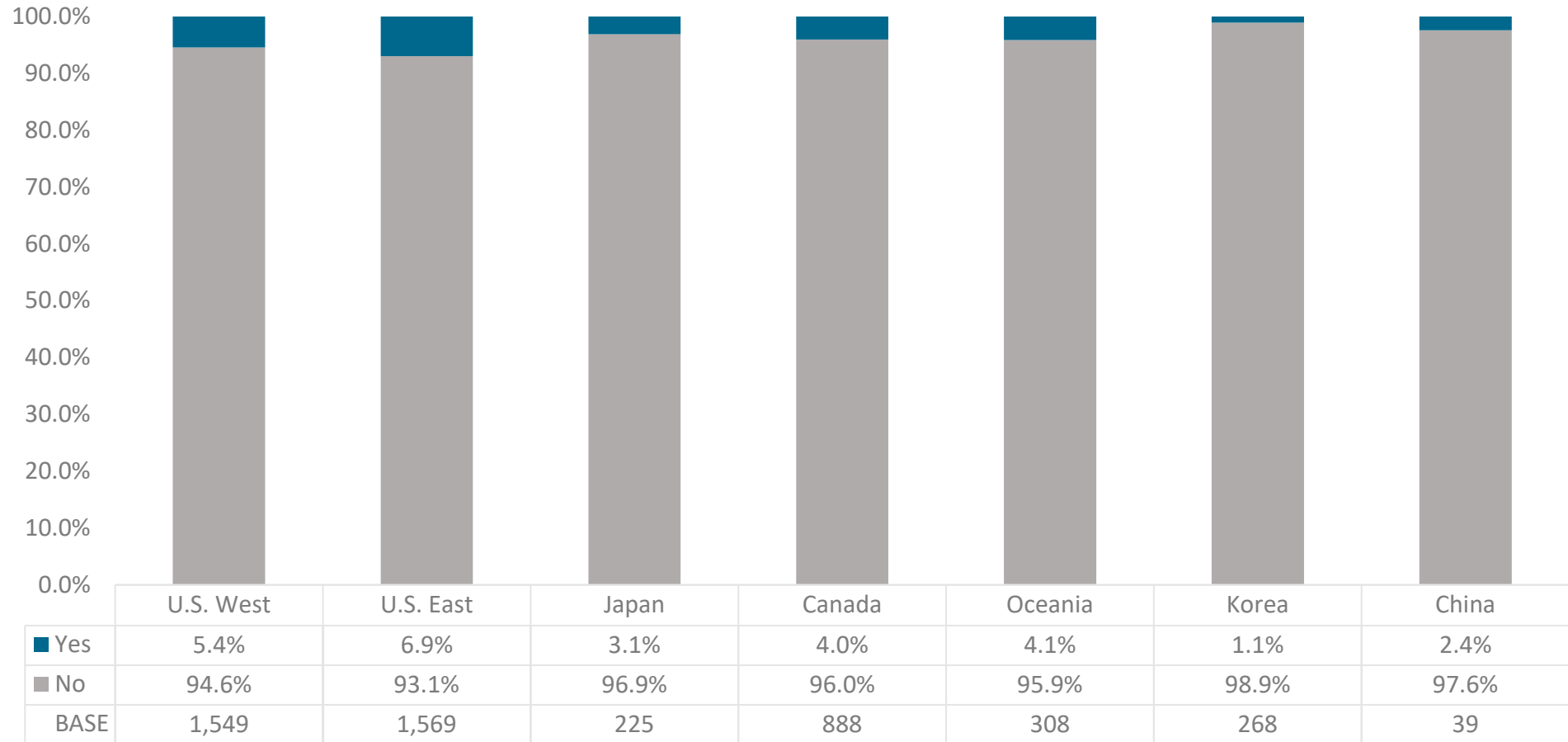
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	92.6%	91.8%	95.6%	95.4%	97.7%	99.6%	97.6%
<b>Airport shuttle</b>	12.3%	14.5%	22.2%	14.3%	27.2%	14.4%	12.4%
<b>Trolley</b>	3.1%	3.9%	42.2%	4.5%	13.7%	27.9%	0.0%
<b>Public bus</b>	3.5%	4.4%	28.0%	8.9%	20.8%	17.0%	13.1%
<b>Tour bus/ tour van</b>	5.8%	14.5%	17.7%	10.4%	21.3%	27.5%	4.7%
<b>Taxi/ limo</b>	6.3%	7.4%	35.2%	11.0%	37.7%	23.6%	15.4%
<b>Rental car</b>	74.2%	70.2%	24.9%	75.7%	31.6%	59.6%	72.2%
<b>Ride share</b>	17.8%	22.3%	17.8%	18.5%	46.6%	23.9%	37.9%
<b>Car share (i.e.,Hui, Turo)</b>	4.7%	4.6%	1.3%	3.6%	3.0%	0.4%	3.0%
<b>Bicycle rental</b>	1.7%	1.3%	2.7%	2.5%	1.0%	1.9%	5.3%

# ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>TOTAL</b>	37.0%	32.7%	17.3%	26.4%	11.0%	18.7%	13.1%
<b>Visit friends/ family</b>	33.2%	28.6%	16.9%	22.9%	10.4%	17.9%	10.7%
<b>Giving back to the local community</b>	5.5%	5.3%	0.4%	4.6%	0.6%	0.8%	2.4%

# Section 3 – Travelers with Disabilities

# DISABLED TRAVELER - REQUIRED ASSISTANCE



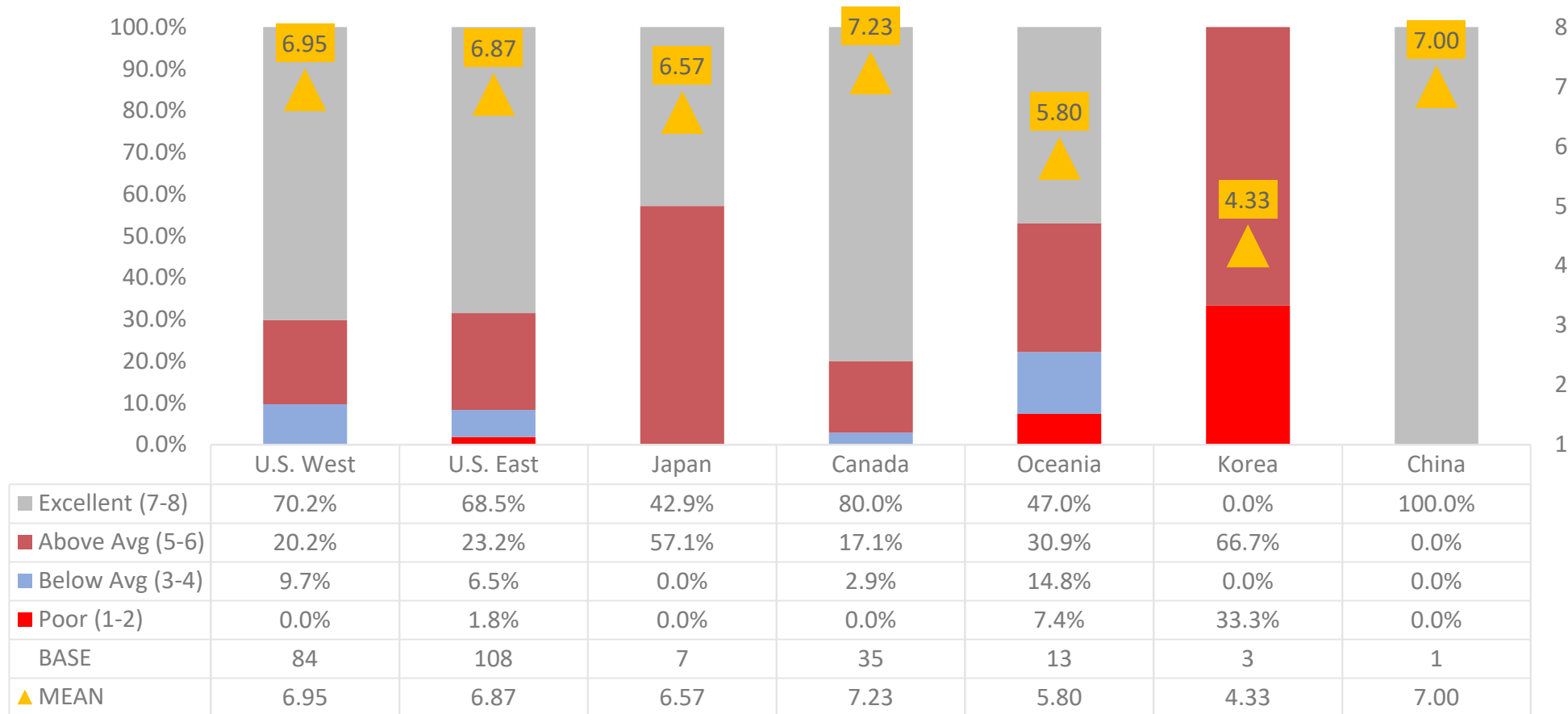


# DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Mobility aid	72.3%	79.8%	14.3%	77.4%	77.8%	33.3%	0.0%
Personal assistance	23.6%	22.0%	0.0%	19.3%	22.2%	33.3%	0.0%
NA- No one needed assistance	3.7%	3.7%	42.9%	5.7%	0.0%	0.0%	100.0%
Orientation and Mobility Assistance	3.5%	1.8%	14.3%	8.4%	0.0%	33.3%	0.0%
Other	3.7%	2.8%	0.0%	5.5%	0.0%	0.0%	0.0%
Lift equipped van	2.3%	0.9%	14.3%	0.0%	0.0%	33.3%	0.0%
ASL Interpreter/ texting/ captioning	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%
Disabled parking/ placard	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	0.0%	0.9%	0.0%	0.0%	0.0%	33.3%	0.0%
Ambulance/ Hospital/ Medical visit	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%
BASE	84	109	7	36	13	3	1

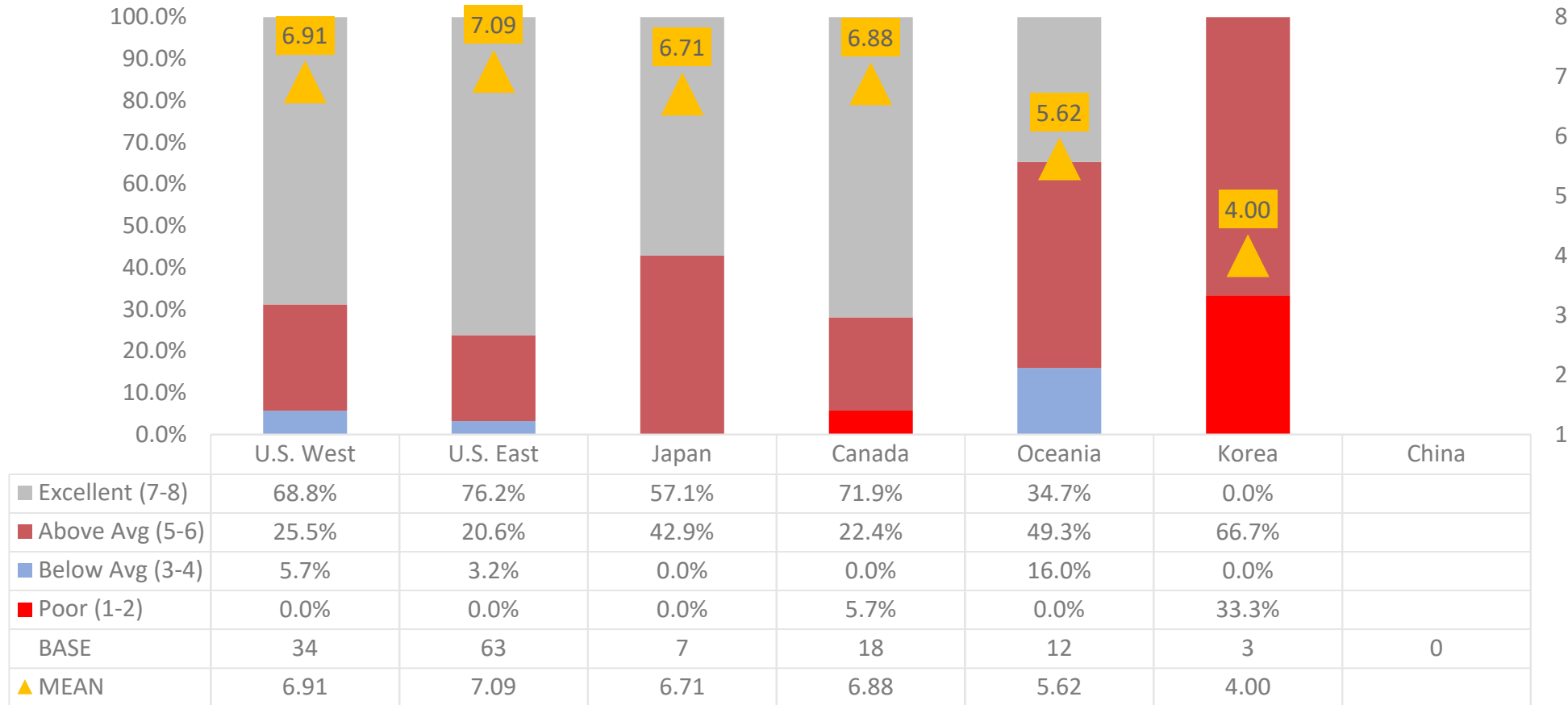
# OVERALL ACCESSIBILITY - AIRPORTS

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



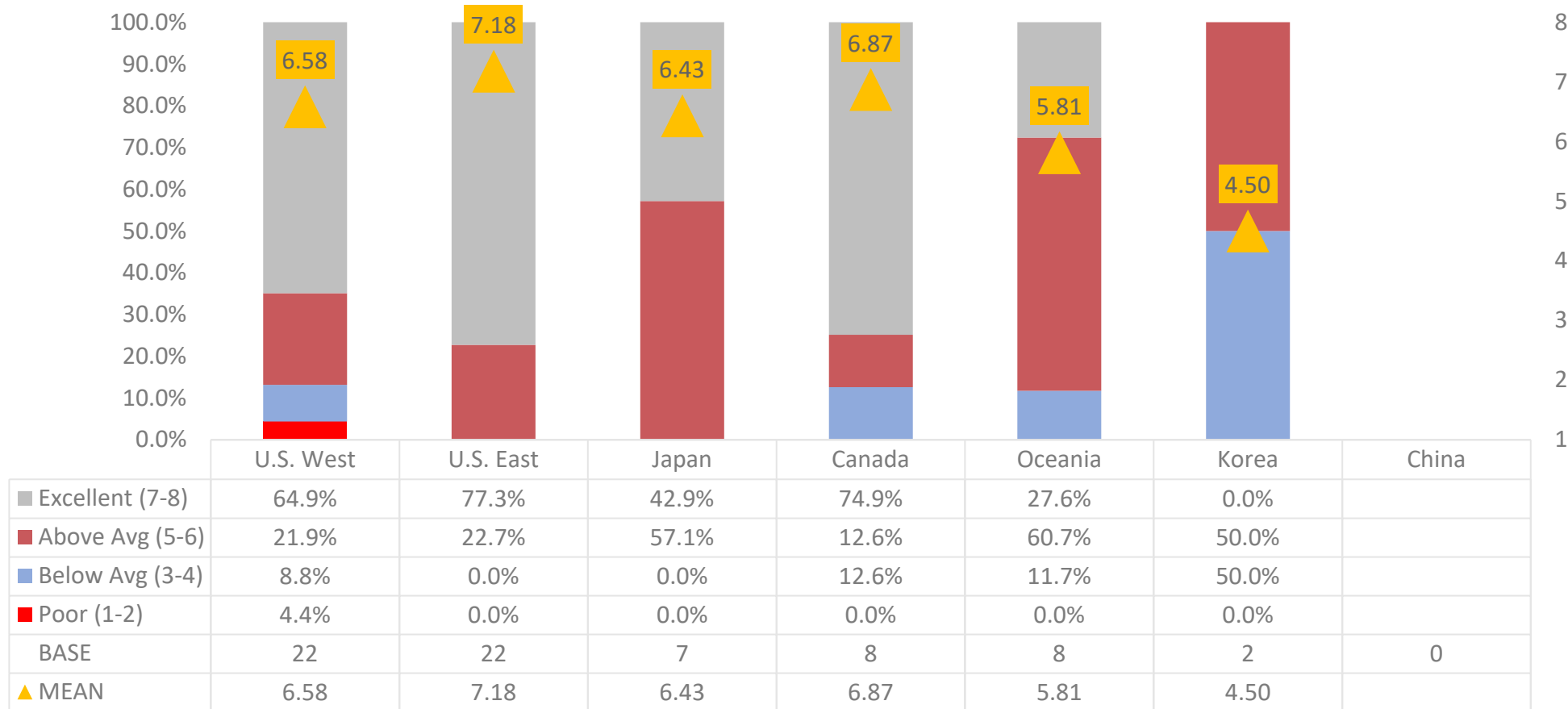
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



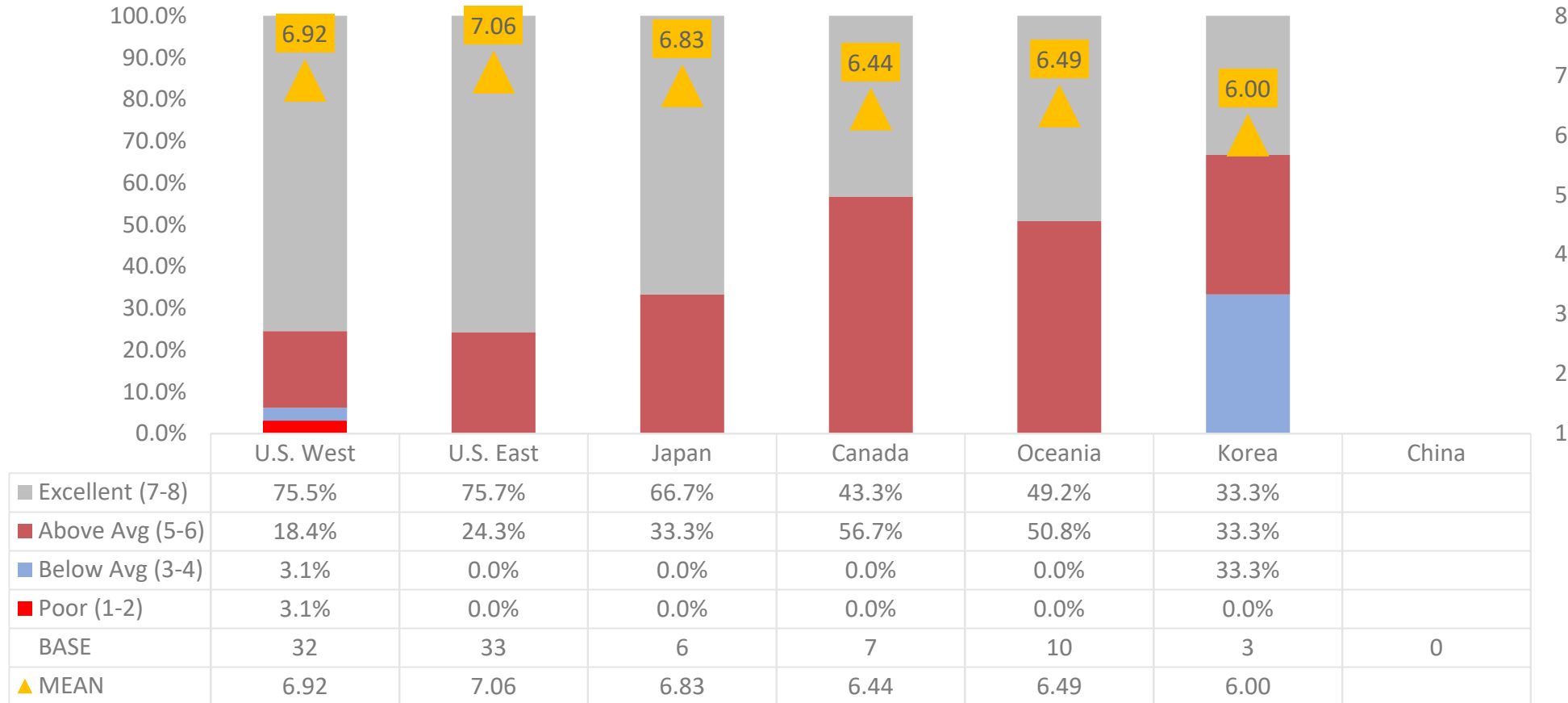
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



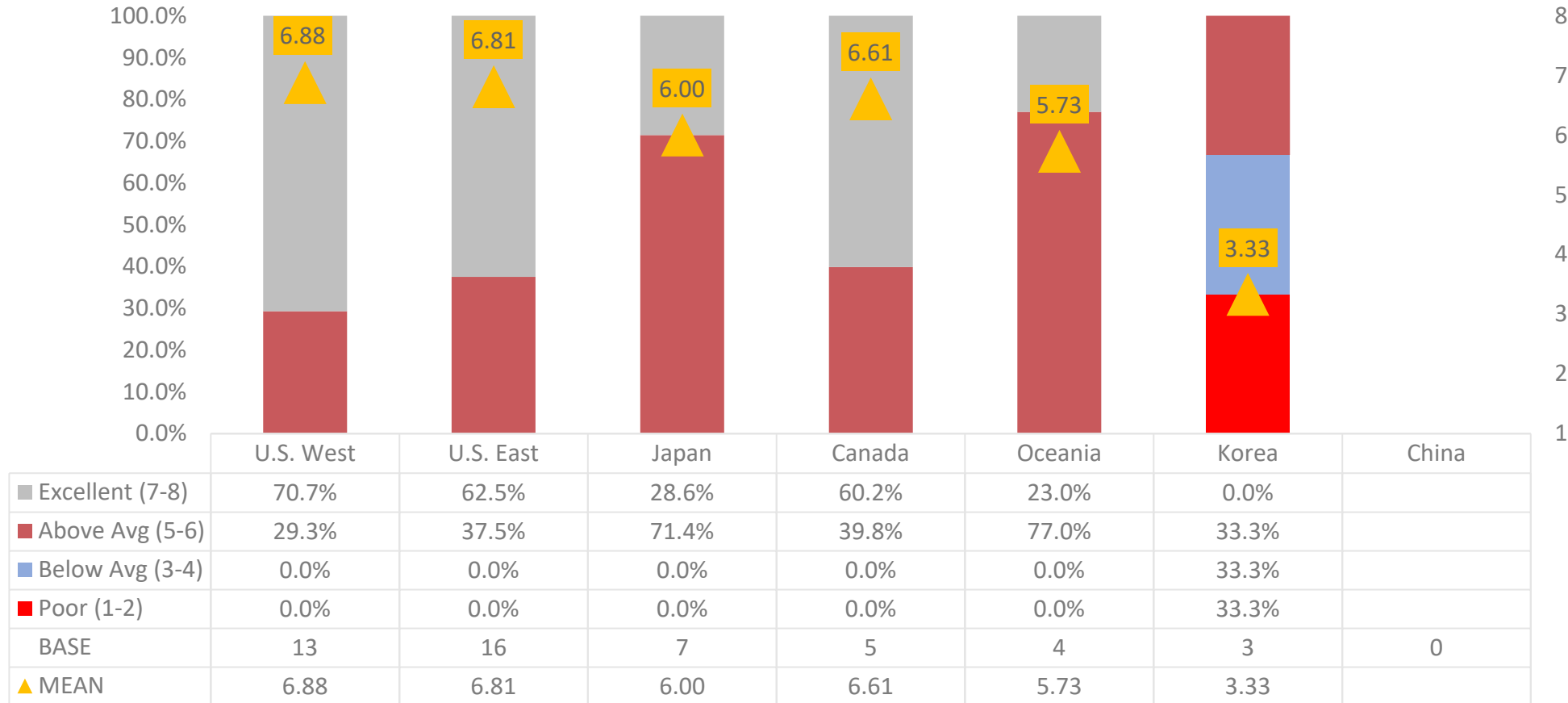
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



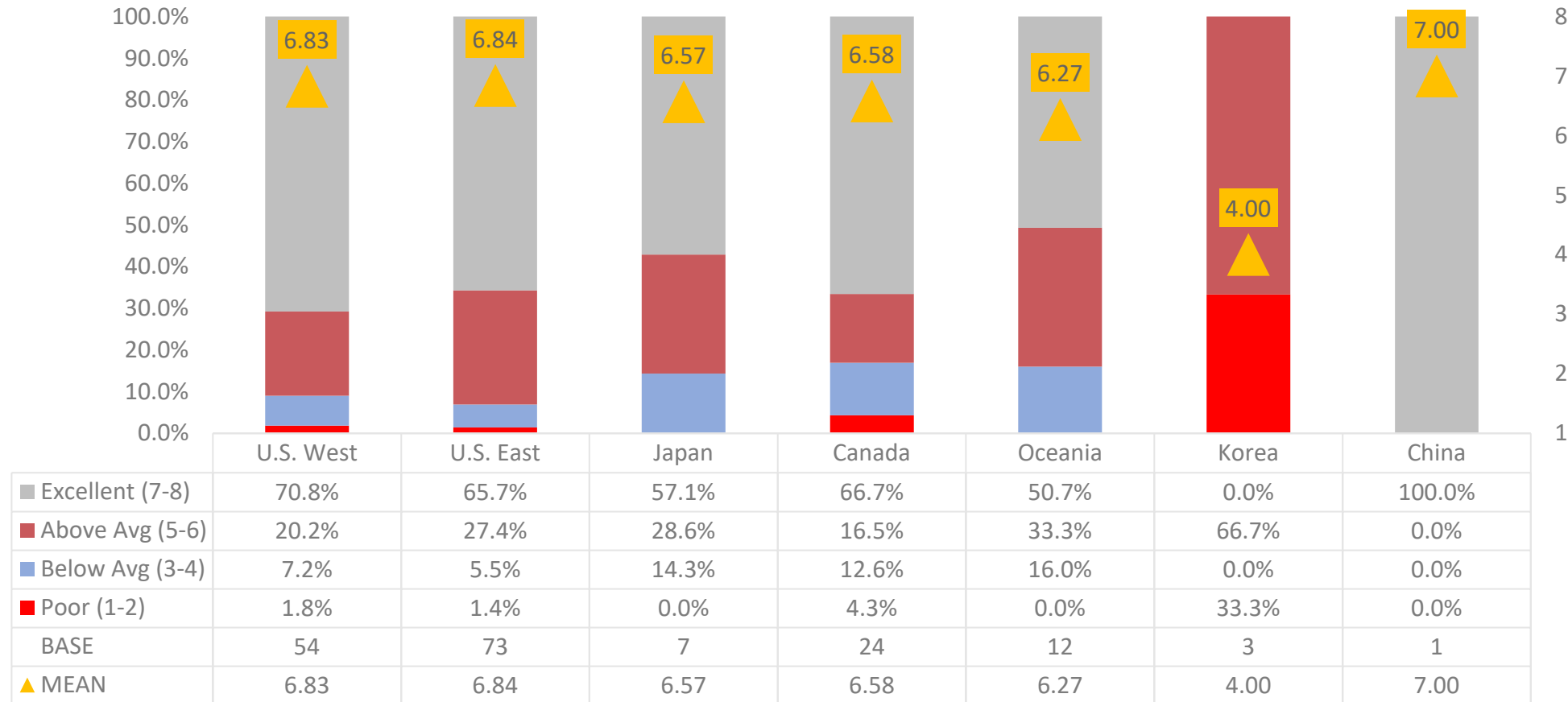
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



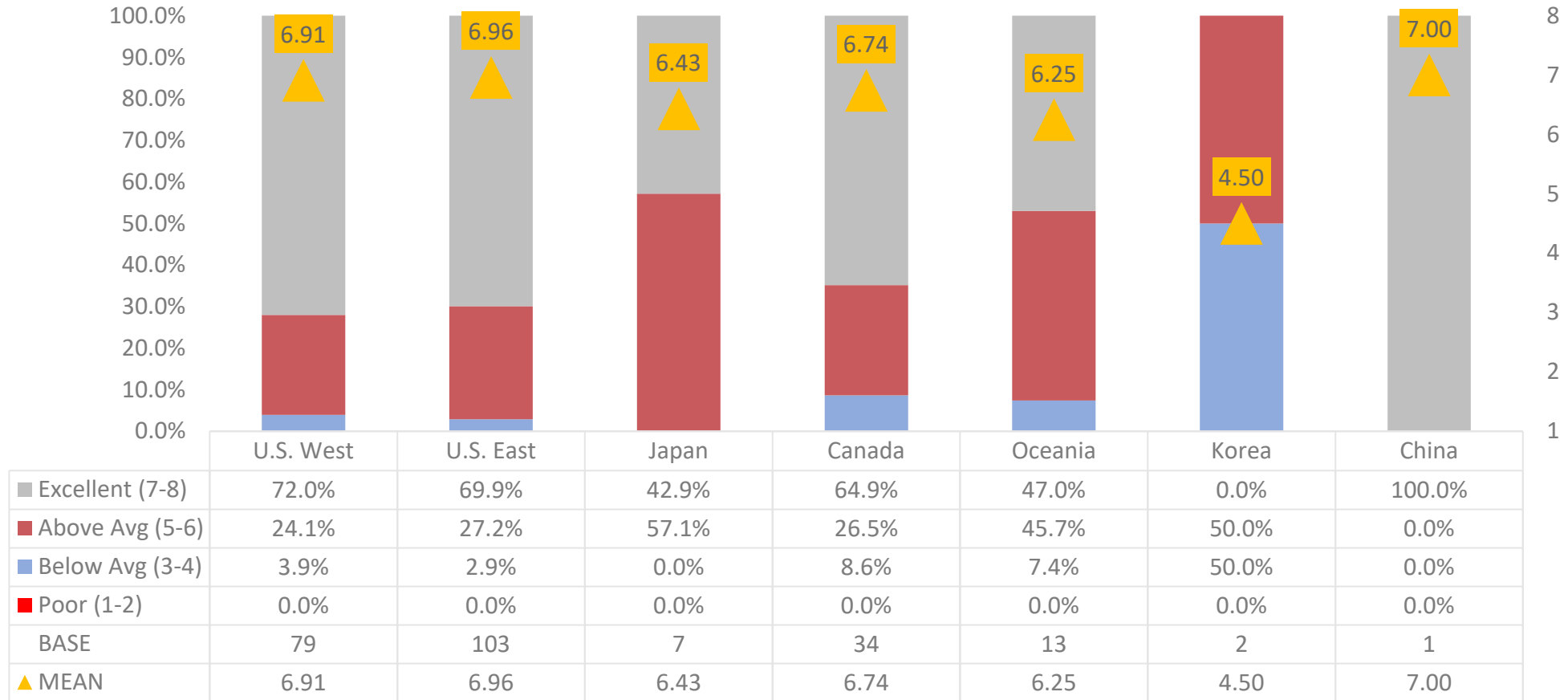
# OVERALL ACCESSIBILITY - HOTELS

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



# OVERALL ACCESSIBILITY - RESTAURANTS

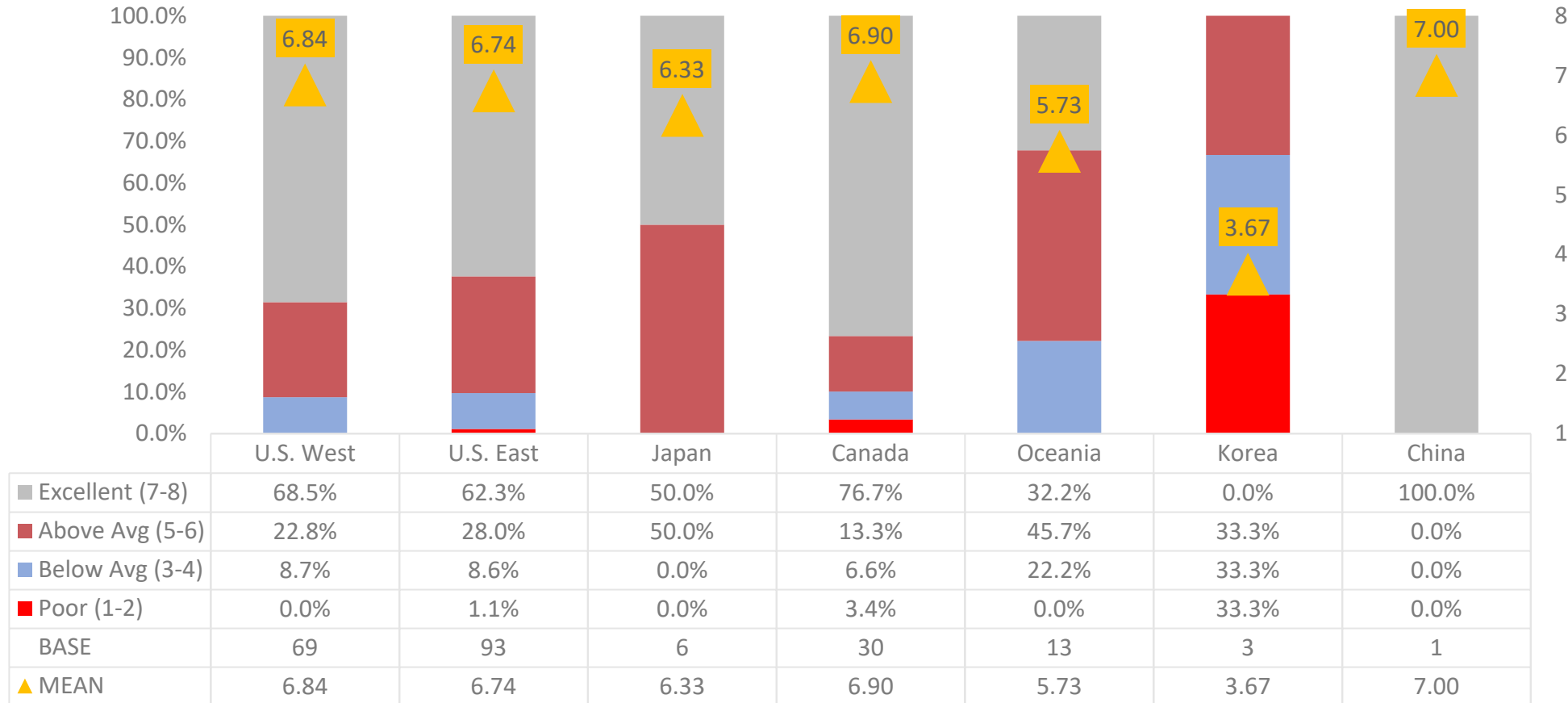
8-pt Rating Scale  
8=Excellent / 1=Poor





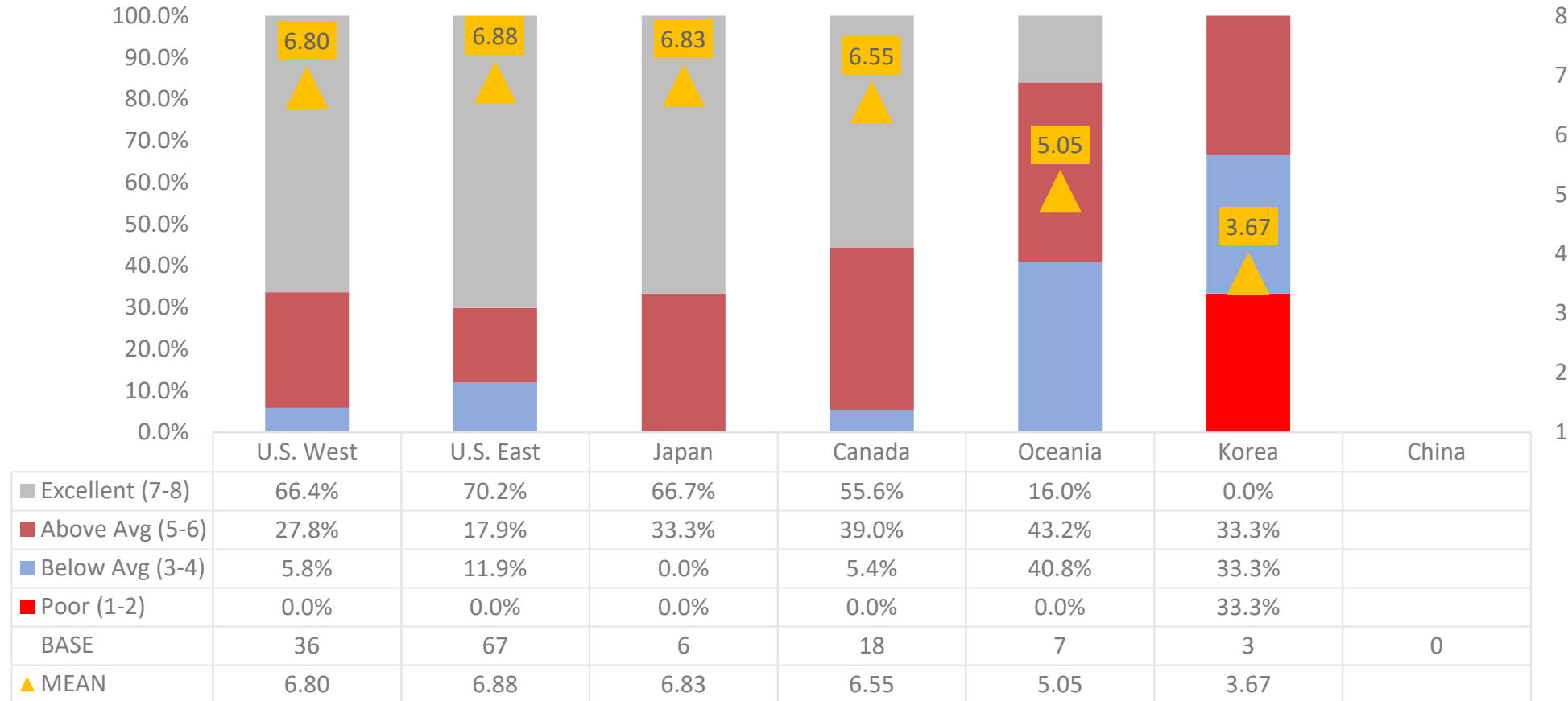
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



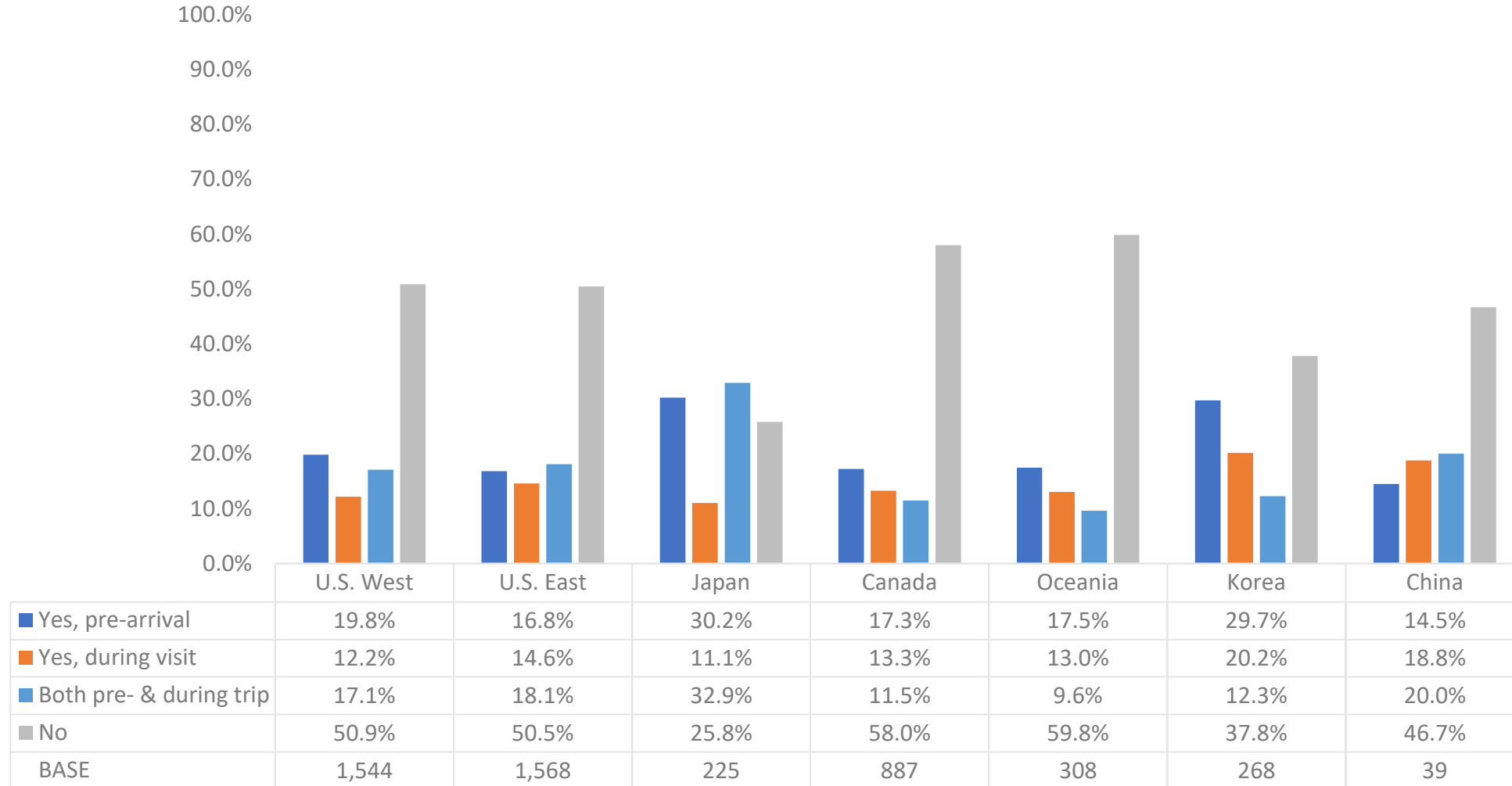
# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

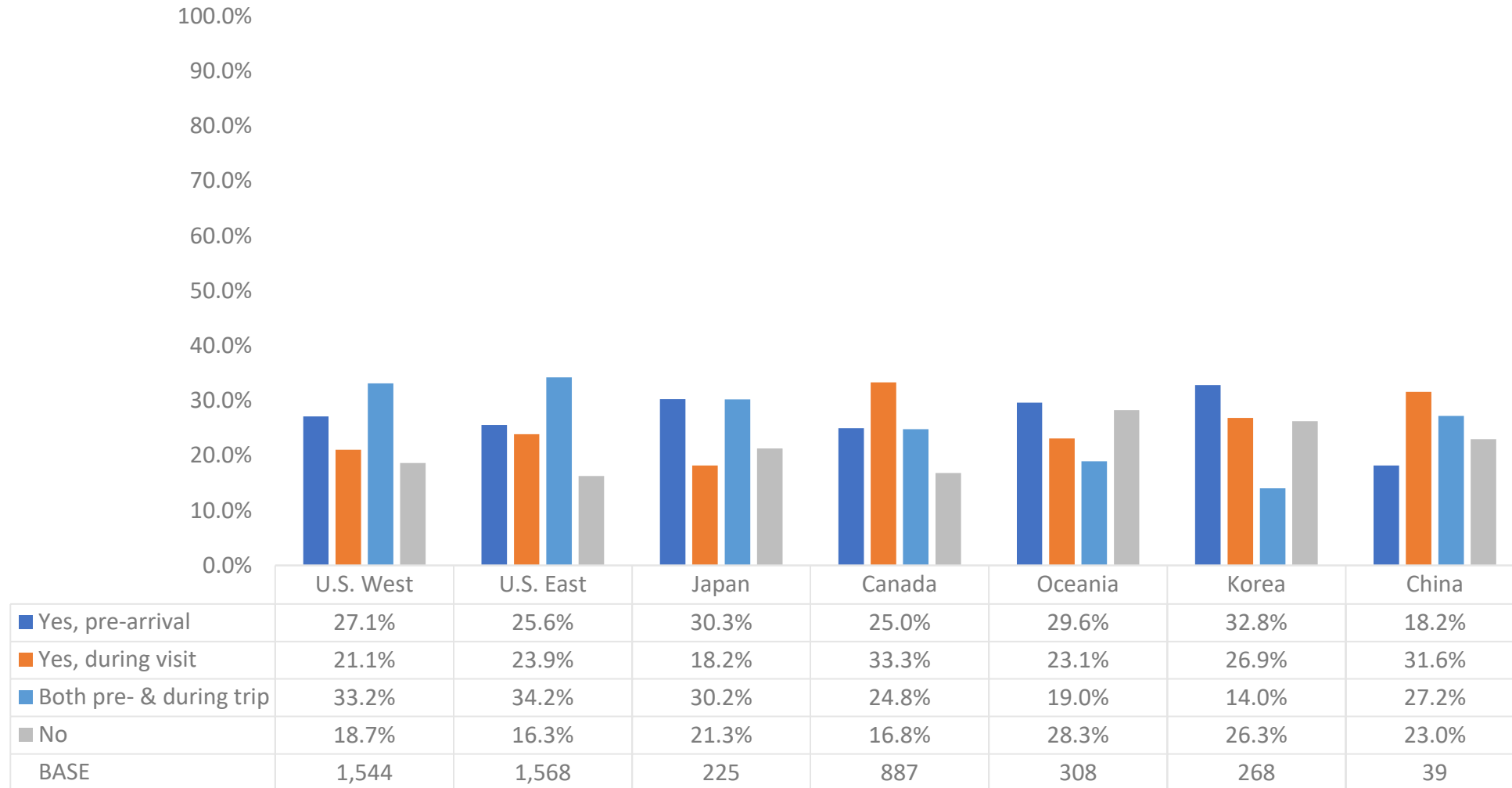


# Section 4 – Alternative Messaging

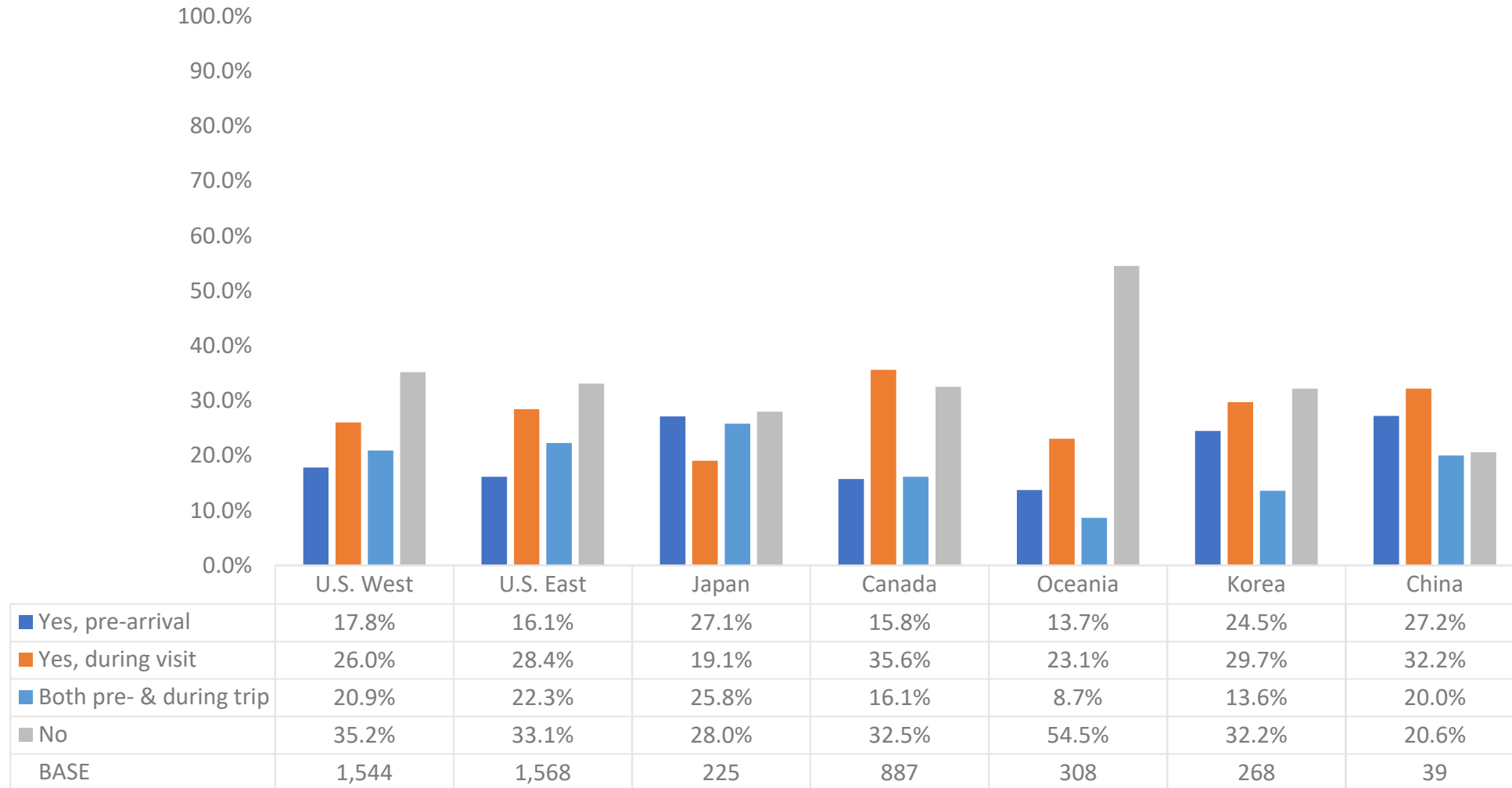
# SAFE AND RESPONSIBLE TRAVEL



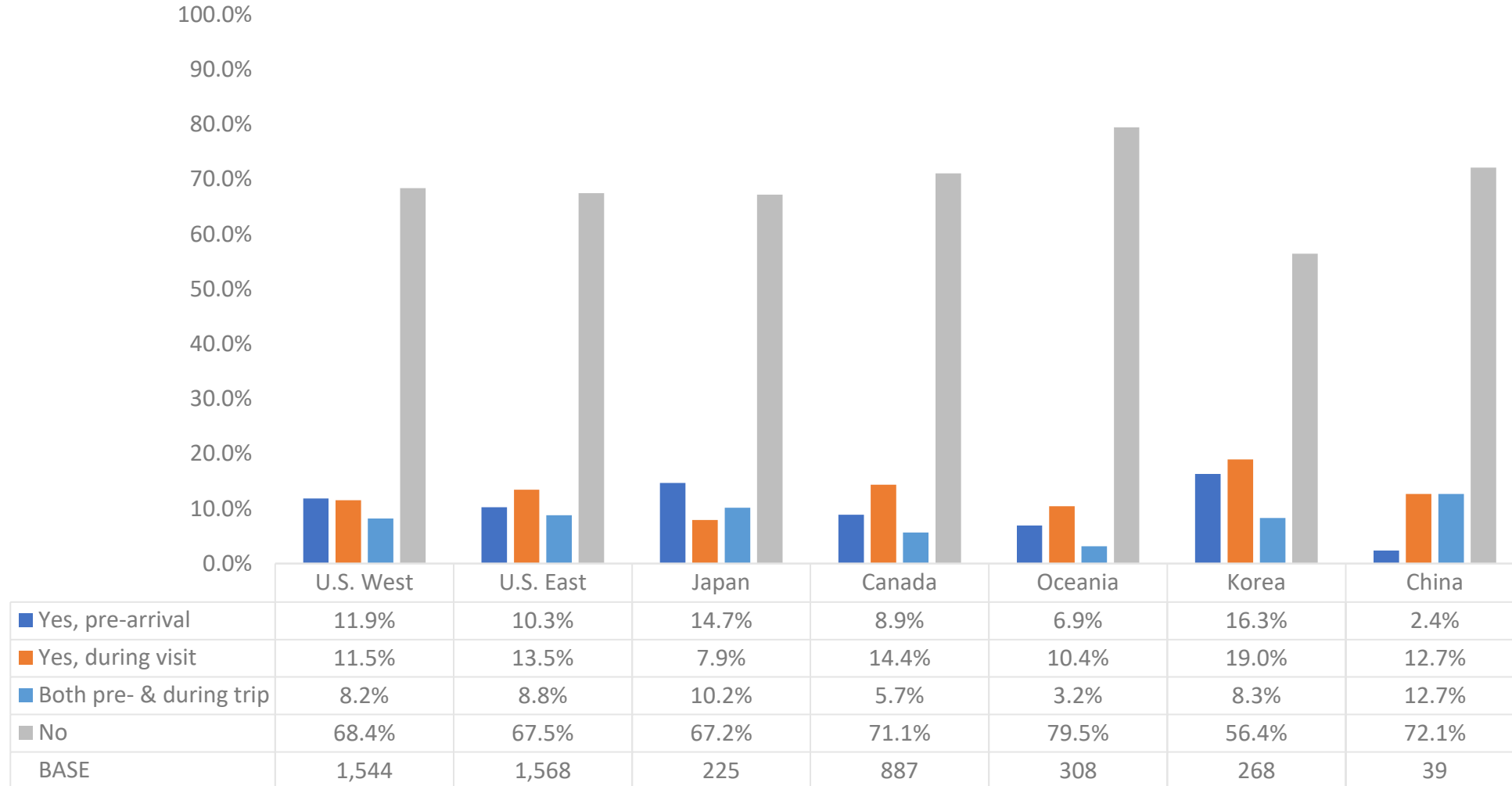
# CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



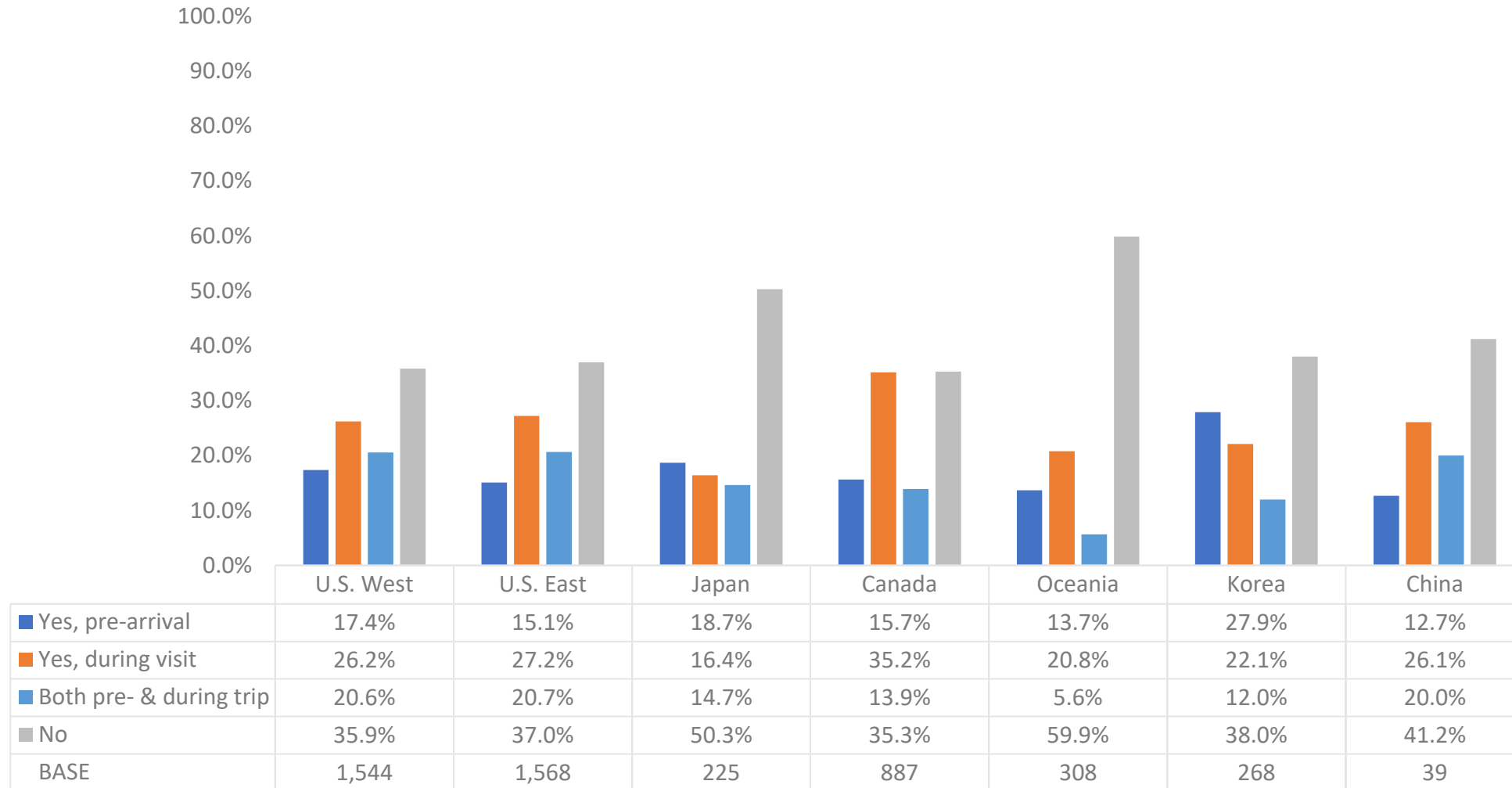
# OCEAN AND HIKING SAFETY



# VOLUNTEER / GIVE-BACK OPPORTUNITIES

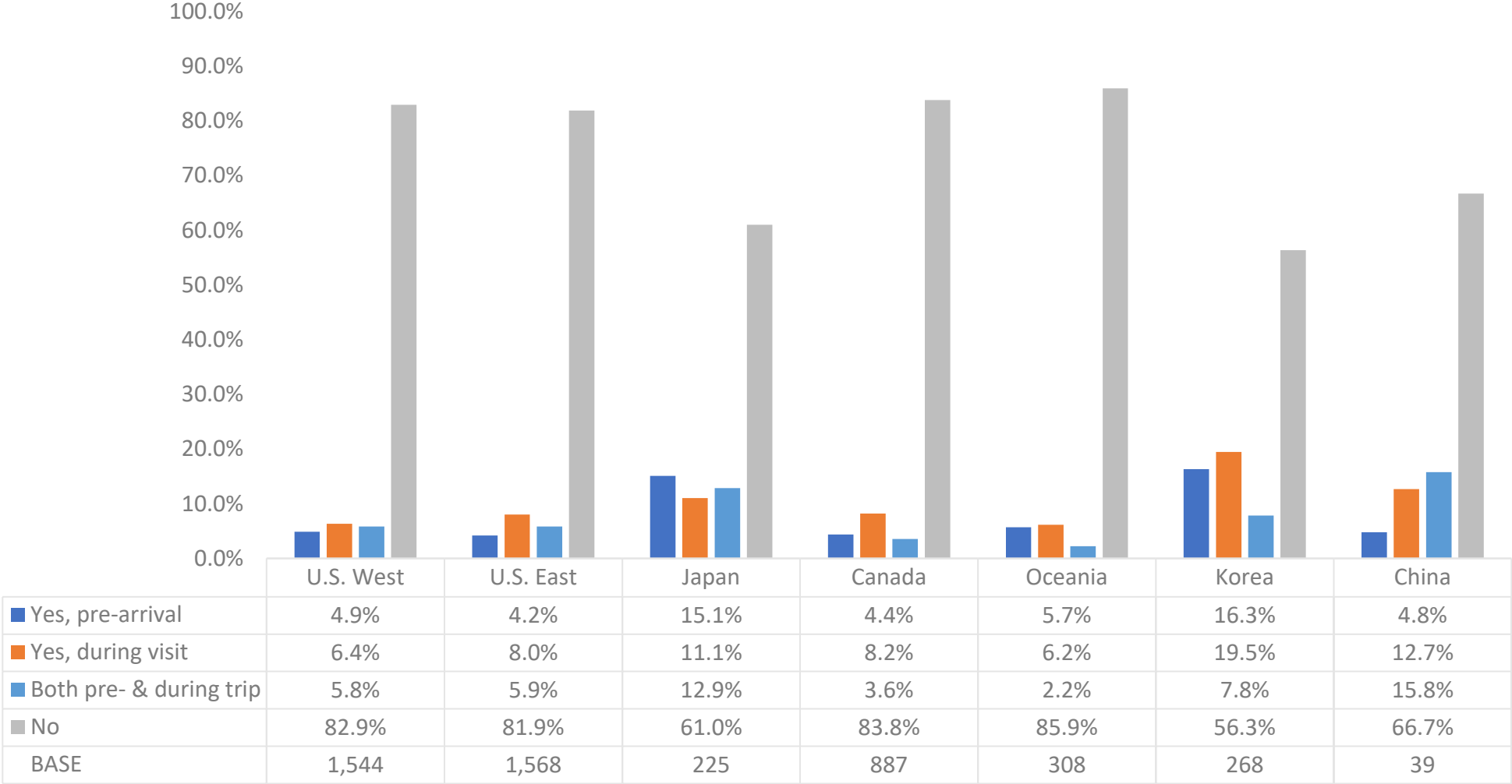


# SUPPORT LOCAL / SHOP LOCAL





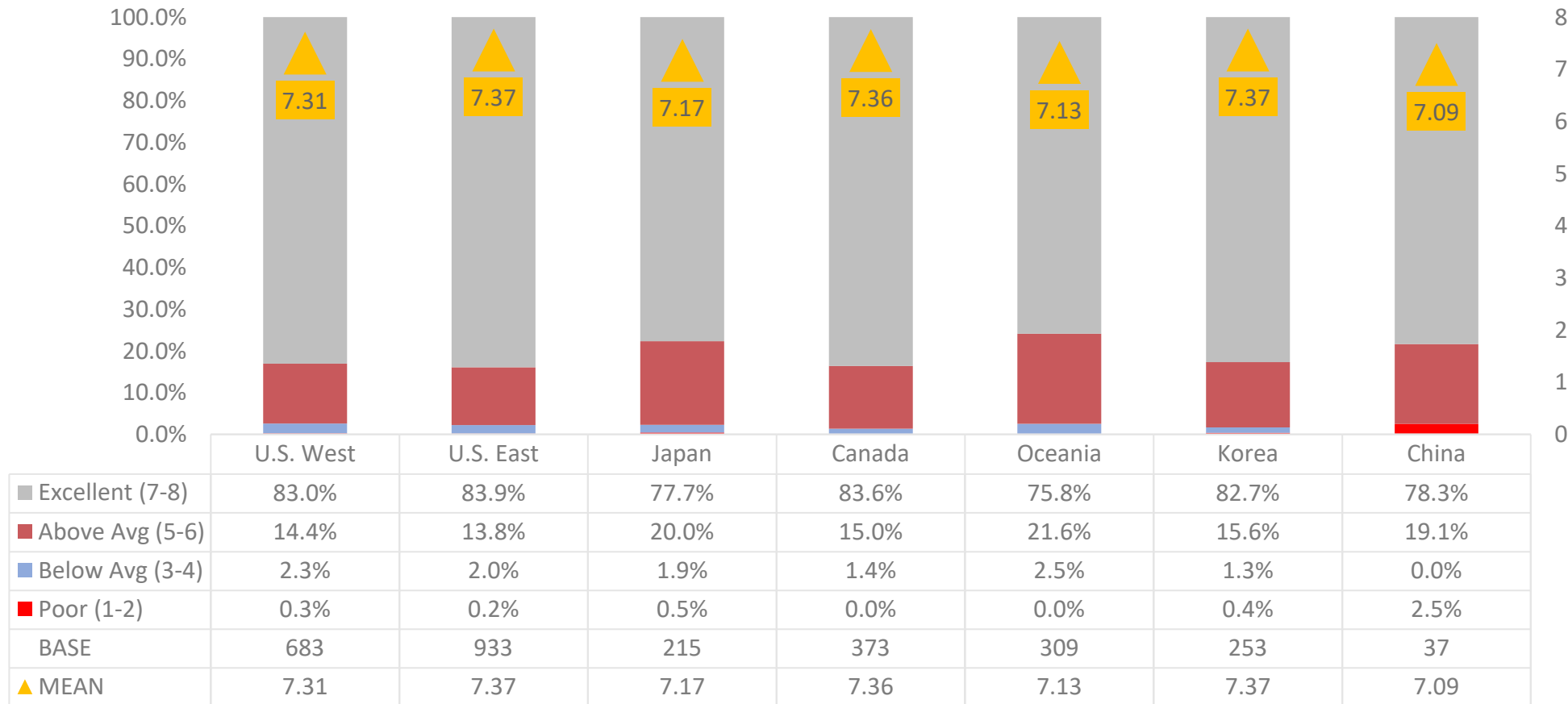
# MĀLAMA HAWAI‘I



# Section 5 – O‘ahu

# SATISFACTION - O'AHU

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

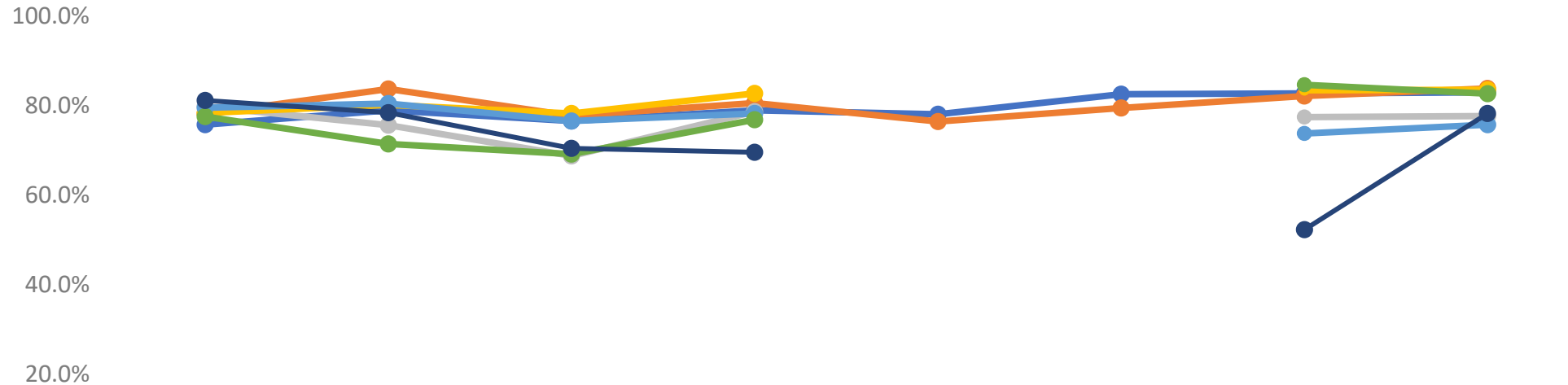


# SATISFACTION - O'AHU

- **Gender:** Females from **U.S. East** expressed higher levels of satisfaction compared to males from this market.
- **Islands visited:** Visitors from **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 **Japan** in larger travel parties of three or more individuals gave higher mean satisfaction scores.
- **Household income:** Satisfaction is lowest among more affluent (\$150K+) visitors from **U.S. East**.
- **Education:** Visitors from **Japan** and **Oceania** with a college degree were more satisfied with their stay than those without a college degree.

# SATISFACTION - O'AHU

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



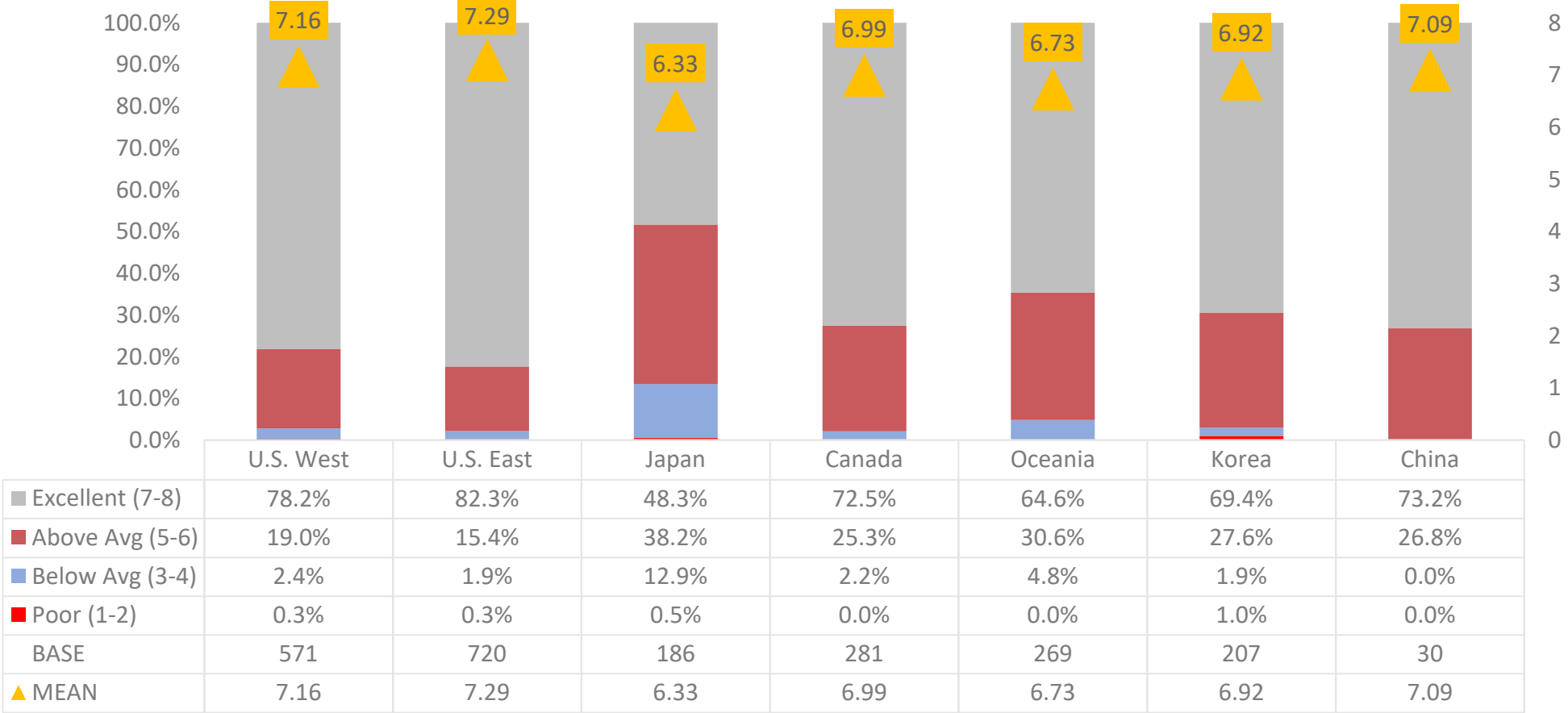
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	75.8%	79.0%	76.6%	79.0%	78.1%	82.6%	82.8%	83.0%
U.S. East	78.2%	83.8%	77.8%	80.6%	76.5%	79.5%	82.2%	83.9%
Japan	79.9%	75.7%	68.8%	78.7%			77.5%	77.7%
Canada	78.4%	80.2%	78.3%	82.8%			83.5%	83.6%
Oceania	79.6%	80.5%	76.6%	78.3%			73.8%	75.8%
Korea	77.6%	71.5%	69.2%	76.9%			84.7%	82.7%
China	81.2%	78.5%	70.5%	69.6%			52.3%	78.3%

P= Preliminary Data

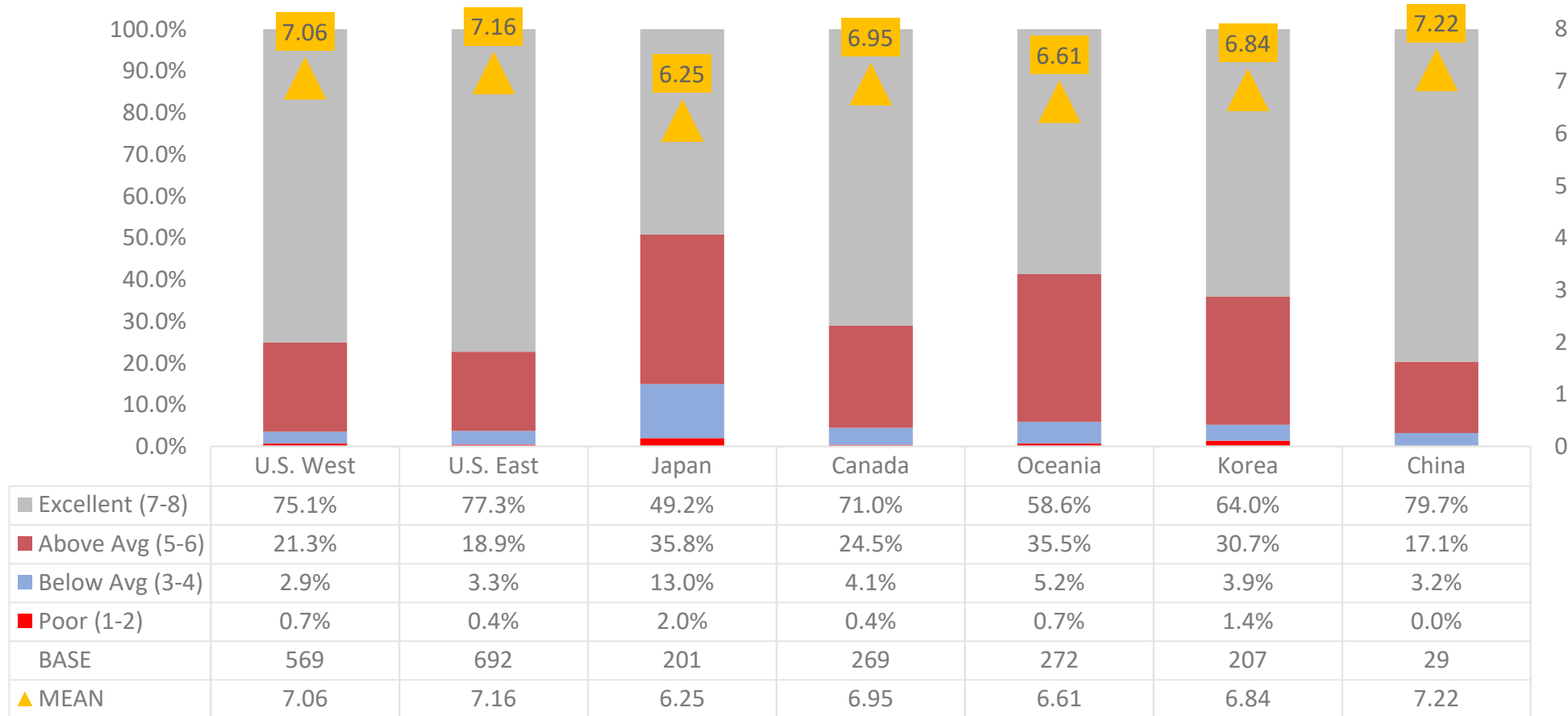
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



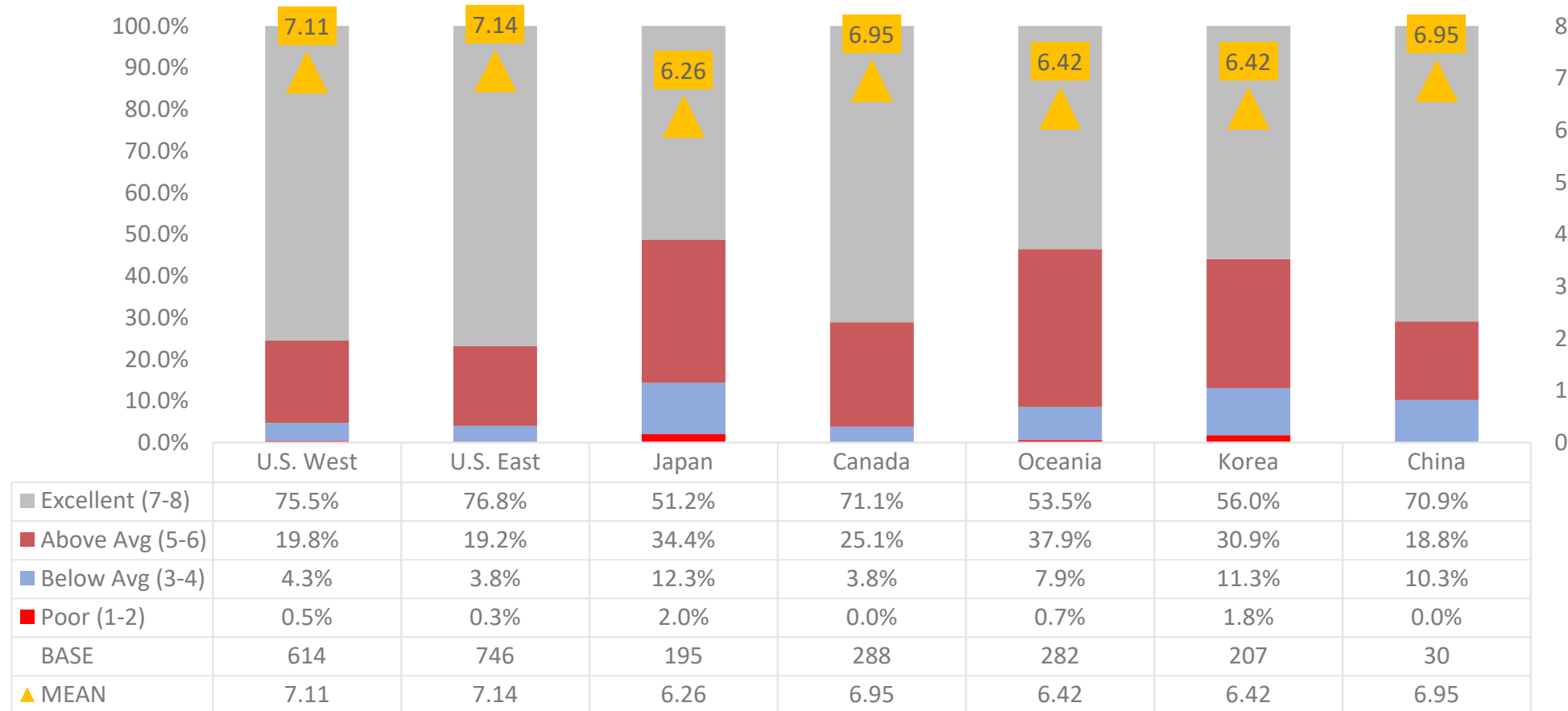
# SHOPPING - O'AHU

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



# DINING/ FOOD & BEVERAGES - O'AHU

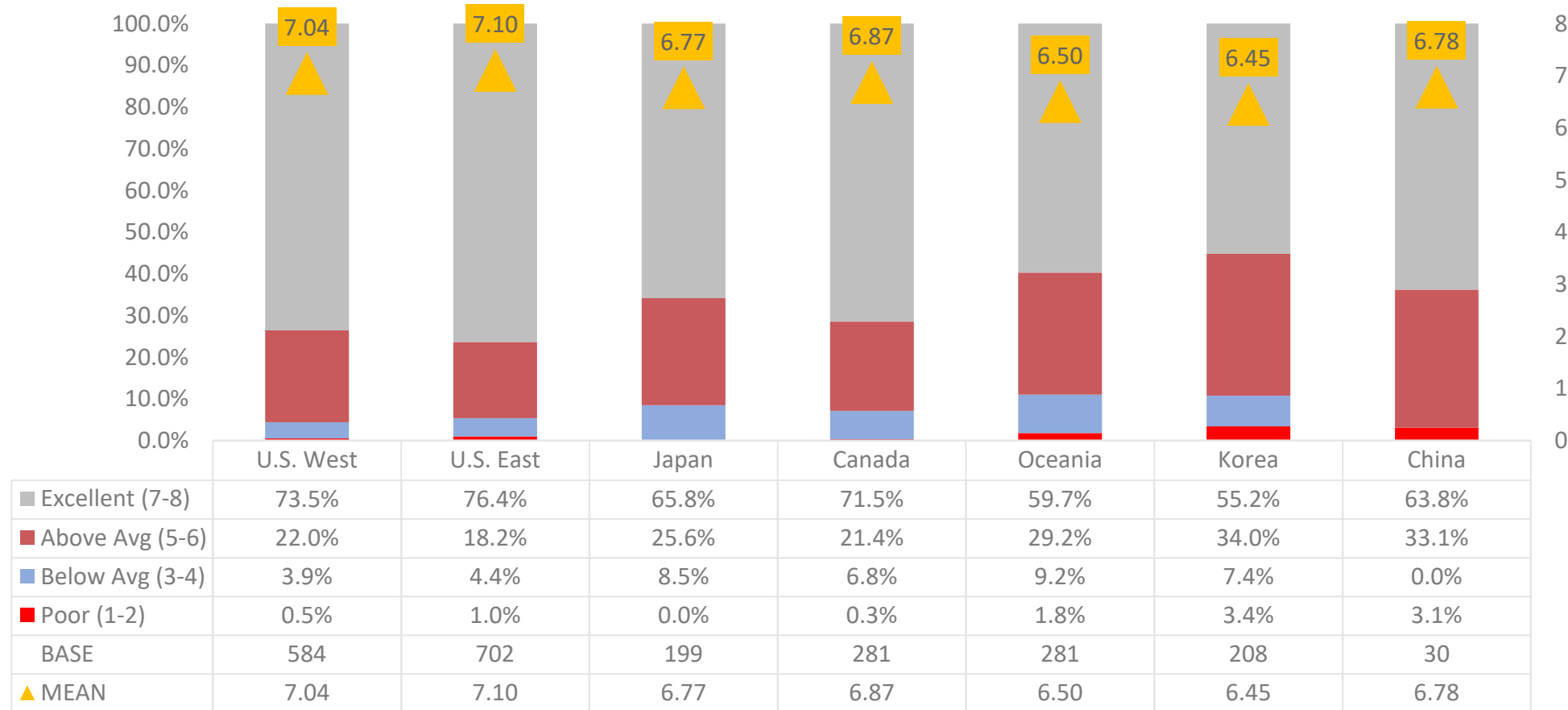
8-pt Rating Scale  
8 = Excellent / 1 = Poor





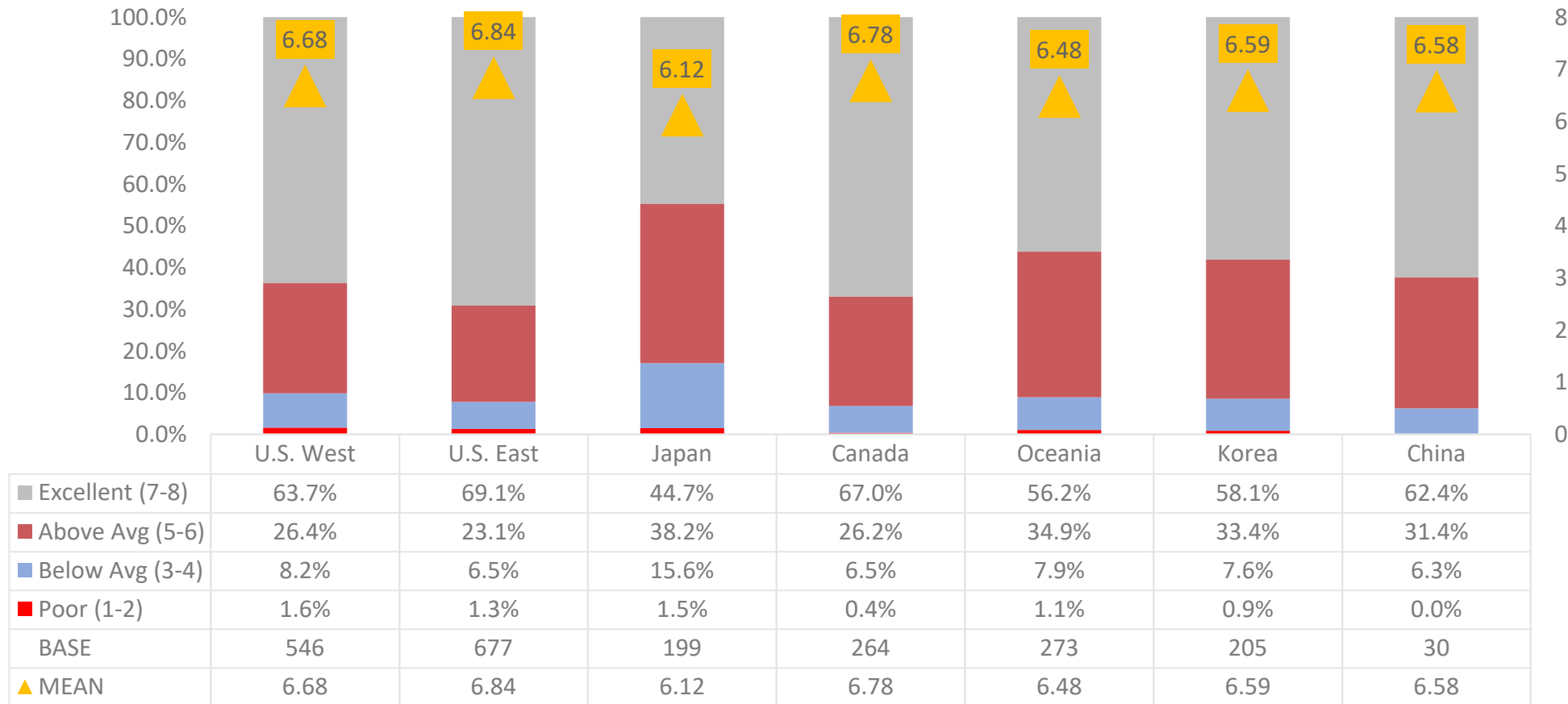
# LODGING/ ACOMMODATIONS - O'AHU

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



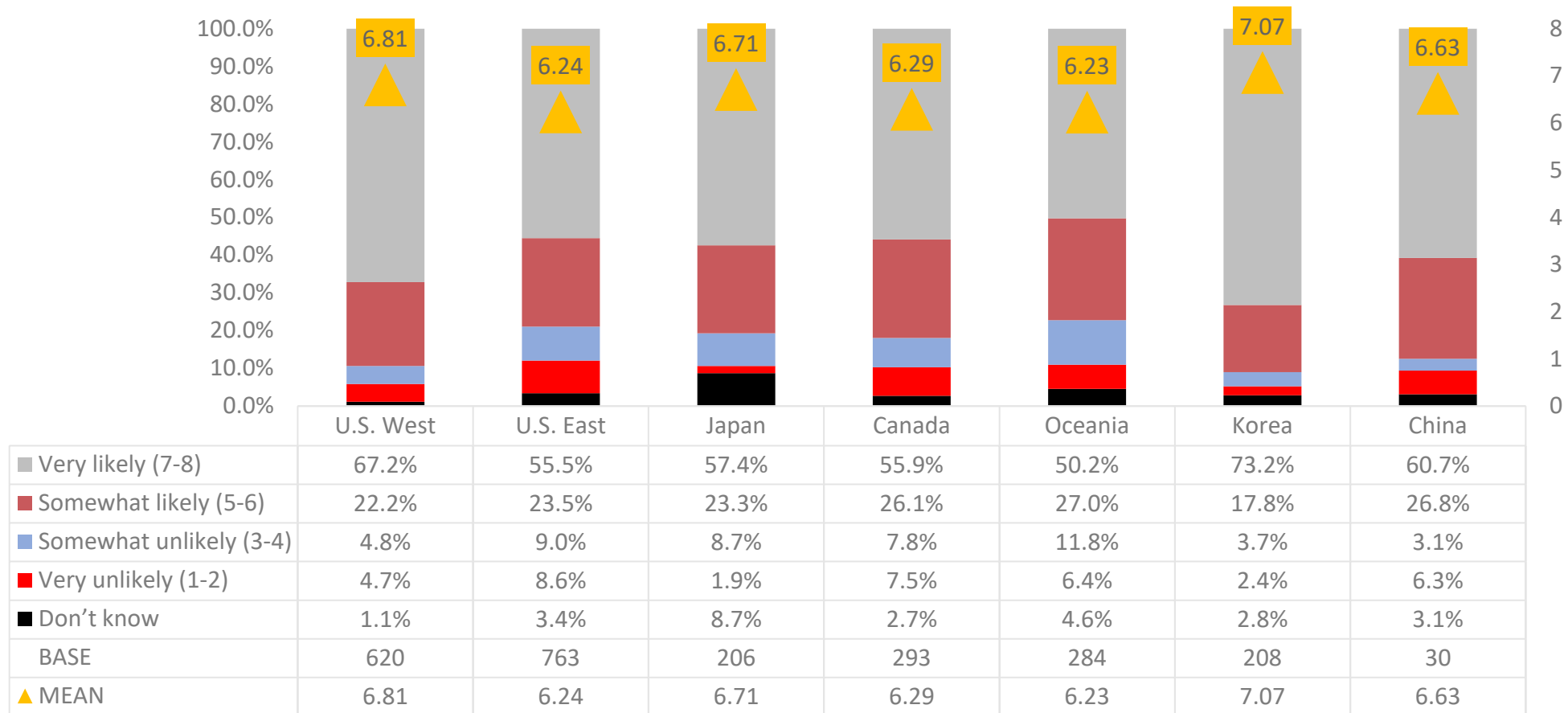
# TRANSPORTATION ON ISLAND - O‘AHU

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



# LIKELIHOOD OF RETURN VISIT - O‘AHU

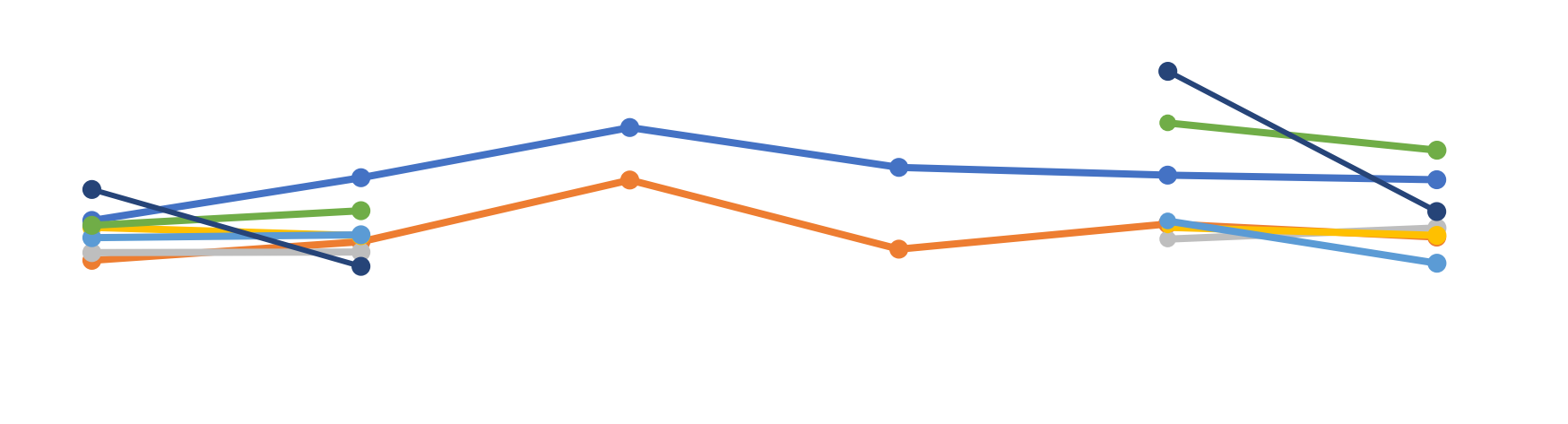
8-pt Rating Scale  
8 = Excellent / 1 = Poor



# LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)

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

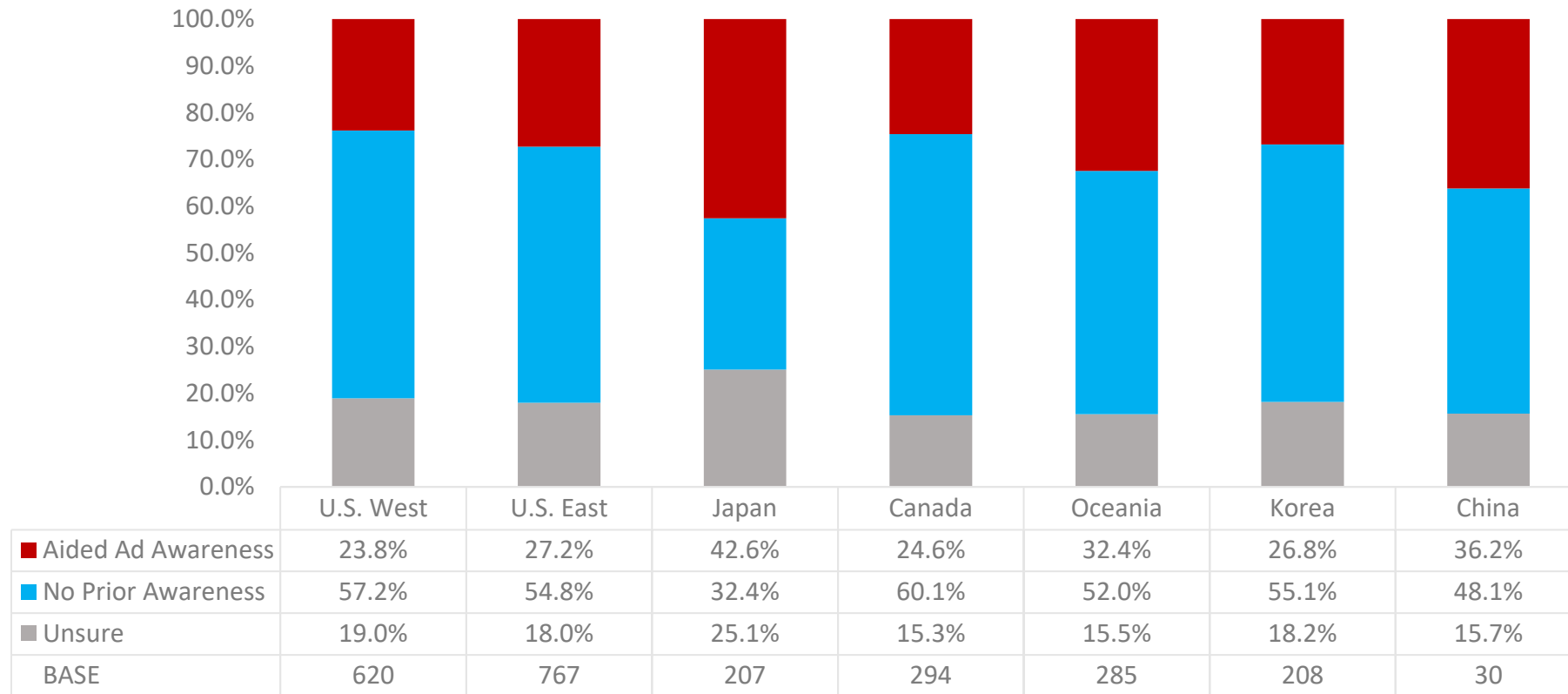


Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	58.9%	67.6%	77.8%	69.7%	68.1%	67.2%
U.S. East	50.8%	54.6%	67.1%	53.1%	58.2%	55.5%
Japan	52.4%	52.5%			55.1%	57.4%
Canada	57.5%	55.8%			57.5%	55.9%
Oceania	55.4%	56.0%			58.8%	50.2%
Korea	57.9%	60.9%			78.7%	73.2%
China	65.2%	49.6%			89.2%	60.7%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS - O'AHU



# MOTIVATING FACTORS - O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Famous landmarks or imagery/ natural beauty</b>	36.1%	40.3%	38.7%	41.6%	41.3%	68.6%	49.6%
<b>Hawaiian cultural events</b>	12.6%	15.7%	15.5%	16.0%	10.8%	5.6%	25.6%
<b>Outdoor or sporting activities and events</b>	15.3%	13.7%	11.6%	15.6%	9.4%	9.8%	24.5%
<b>Social media posts and videos</b>	10.6%	10.4%	27.1%	16.3%	16.5%	20.1%	13.4%
<b>Hawaiian music</b>	7.1%	6.0%	19.4%	9.5%	6.6%	1.5%	10.3%
<b>Television programs or movies filmed in Hawai‘i</b>	7.4%	11.7%	40.6%	16.0%	15.7%	13.7%	17.4%
<b>BASE</b>	620	766	207	293	285	208	30

# ATTRACTIONS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Atlantis Submarine & Cruises	1.8%	3.6%	2.9%	1.7%	1.0%	3.9%	10.3%
Bernice P. Bishop Museum	3.1%	4.2%	4.4%	5.5%	2.6%	1.1%	10.3%
Byodo-In Temple	11.2%	13.3%	2.5%	12.9%	5.4%	1.9%	4.0%
Chinatown & Honolulu Art District	9.3%	9.8%	8.9%	11.9%	6.4%	2.2%	19.7%
Diamond Head State Monument	22.4%	30.9%	25.5%	33.6%	23.7%	43.3%	26.8%
Dole Plantation	30.0%	37.6%	8.9%	34.3%	21.3%	46.0%	15.7%
Foster Botanical Garden	3.2%	3.2%	1.5%	3.4%	1.7%	0.0%	3.1%
Hale'iwa	15.9%	21.6%	20.7%	21.2%	9.4%	8.6%	10.3%
Hanauma Bay Nature Reserve	9.9%	10.7%	5.9%	12.6%	4.6%	20.5%	6.3%
Harold L. Lyon Arboretum	0.3%	0.3%	0.0%	1.3%	0.3%	0.0%	0.0%
Hawai'i State Art Museum	0.5%	1.3%	0.5%	2.4%	1.1%	0.6%	0.0%
Honolulu Museum of Art	2.0%	2.2%	2.0%	2.7%	2.8%	1.5%	0.0%
Hawaiian Mission Houses, Historic Site and Archive	0.5%	1.3%	0.5%	1.4%	0.7%	1.0%	0.0%
Hawai'i's Plantation Village	0.8%	1.5%	0.0%	2.7%	1.4%	2.2%	6.3%
Honolulu Zoo	7.4%	6.1%	5.4%	11.3%	6.5%	8.9%	4.0%

# ATTRACTIONS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Ho'omaluhia Botanical Garden	6.1%	5.3%	0.5%	4.8%	3.5%	2.8%	0.0%
'Iolani Palace State Monument	4.3%	5.3%	9.3%	6.1%	6.8%	14.6%	0.0%
Kailua Town	13.3%	10.5%	9.9%	16.4%	5.0%	8.0%	0.0%
Kaiwi State Scenic Shoreline/ Makapu'u Trail	4.2%	5.4%	1.5%	9.2%	2.5%	0.5%	3.1%
Kaka'ako Street Art	1.4%	2.2%	13.8%	2.7%	0.3%	6.6%	3.1%
Koko Head Crater Trail	4.7%	7.8%	0.5%	10.3%	4.2%	4.5%	3.1%
Kualoa Private Nature Reserve	13.2%	14.3%	7.4%	15.2%	11.1%	15.1%	12.5%
Lanikai or Kailua Beach	23.6%	22.3%	16.3%	32.4%	13.8%	23.6%	18.2%
Mānoa Falls & Trail	7.9%	13.3%	2.5%	12.9%	4.9%	1.0%	3.1%
National Memorial Cemetery of the Pacific	8.2%	11.5%	0.5%	7.5%	7.6%	3.7%	0.0%
Nu'uuanu Pali Lookout	8.2%	10.8%	2.5%	13.9%	5.7%	4.2%	3.1%
North Shore Beaches	40.5%	43.1%	13.3%	46.3%	27.3%	27.1%	37.9%

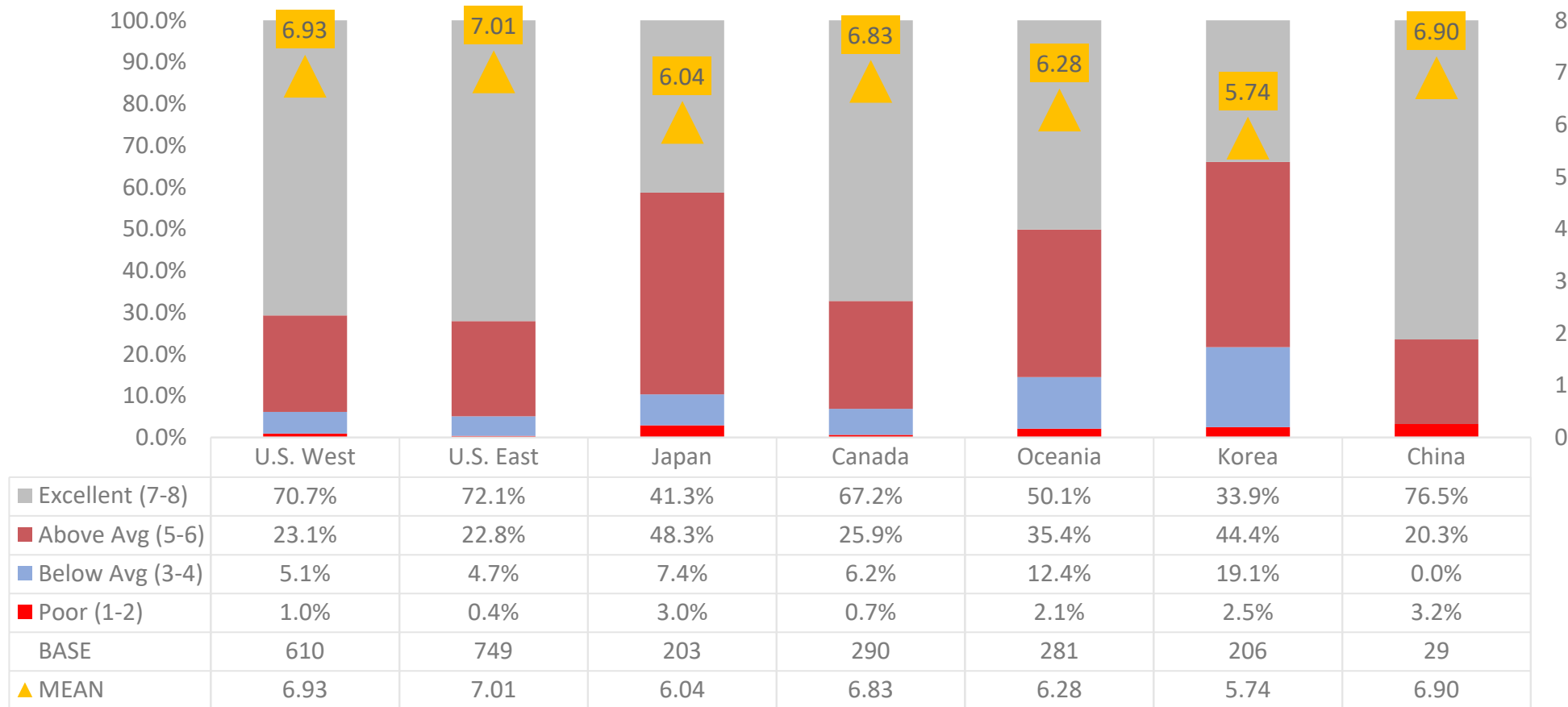


# ATTRACTIONS - O‘AHU

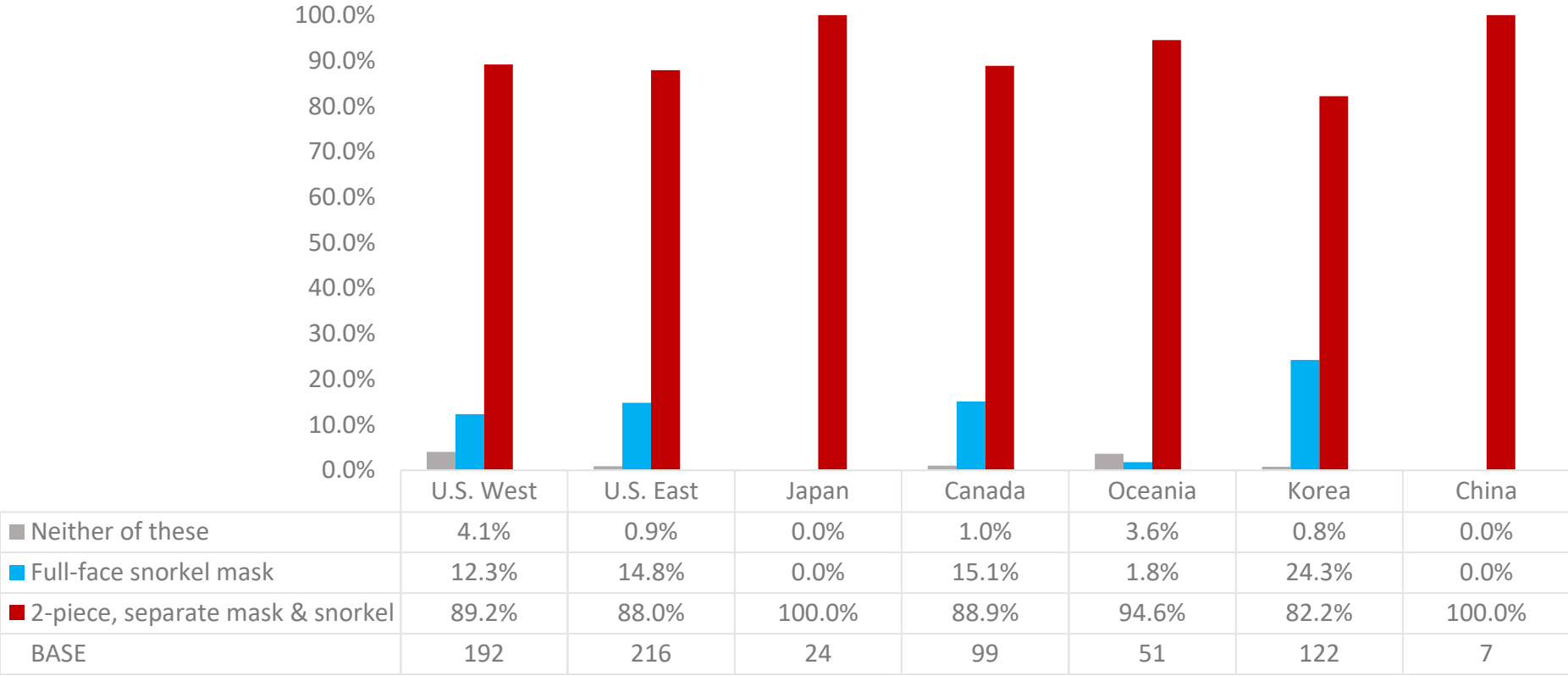
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Pearl Harbor National Memorial</b>	30.2%	45.4%	5.9%	42.8%	37.1%	9.1%	22.0%
<b>Battleship Missouri Memorial</b>	11.5%	18.9%	4.9%	17.1%	20.1%	6.0%	13.4%
<b>Pearl Harbor Aviation Museum</b>	12.9%	16.6%	3.9%	17.4%	13.5%	1.5%	13.4%
<b>Pacific Fleet Submarine Museum</b>	6.3%	7.0%	1.0%	9.9%	3.7%	2.8%	4.0%
<b>Polynesian Cultural Center</b>	13.8%	14.4%	1.5%	16.6%	8.9%	4.1%	19.7%
<b>Queen Emma’s Summer Palace</b>	1.5%	1.3%	0.5%	0.7%	1.7%	0.5%	0.0%
<b>Sea Life Park Hawai‘i</b>	4.7%	3.0%	0.5%	3.4%	3.7%	4.9%	7.1%
<b>Waikīkī Aquarium</b>	5.2%	4.6%	2.0%	5.2%	8.5%	2.3%	0.0%
<b>Waimānalo Beach Park</b>	7.4%	9.1%	3.4%	15.3%	4.5%	7.4%	3.1%
<b>Waimea Valley</b>	14.5%	17.9%	1.5%	18.7%	7.4%	1.9%	3.1%

# DANIEL K. INOUYE INTERNATIONAL AIRPORT

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



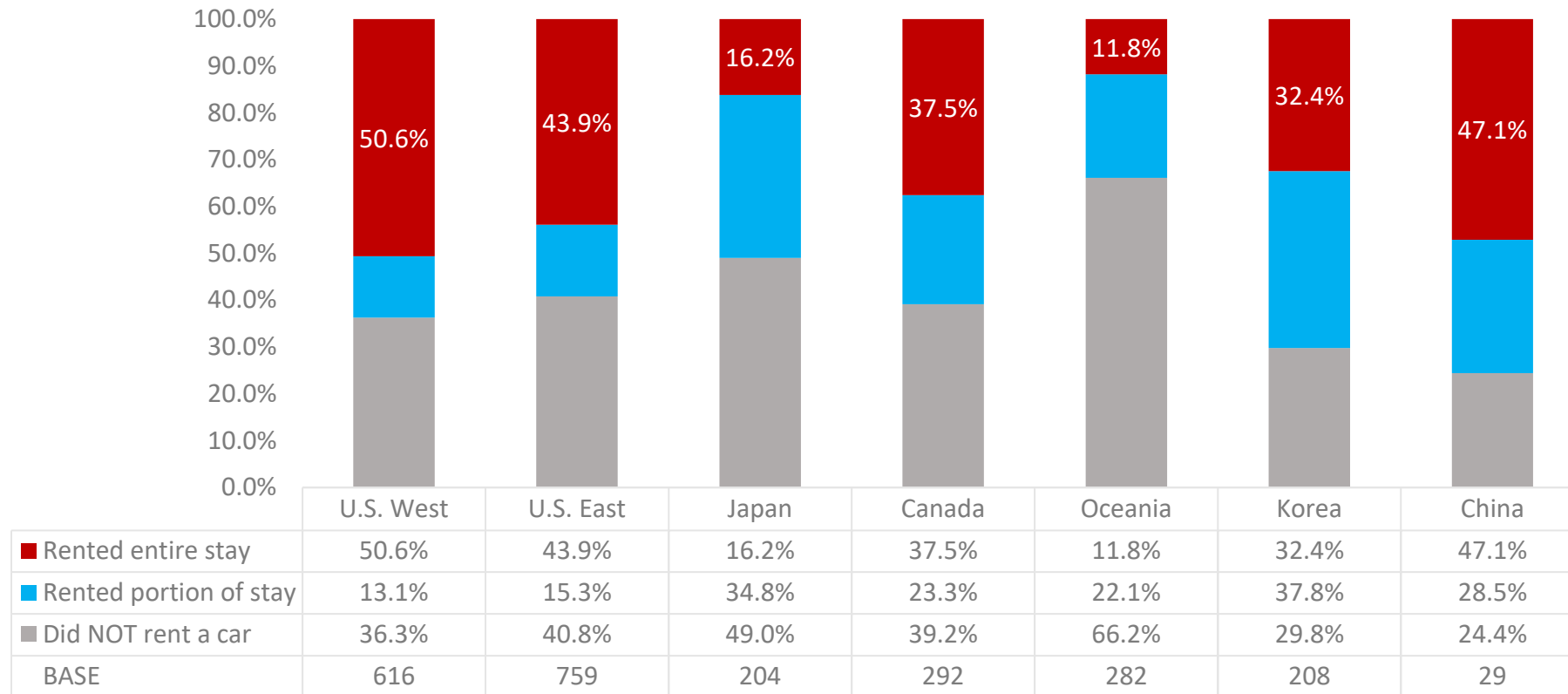
# SNORKELING EQUIPMENT USED - O‘AHU



# SNORKELING OCEAN SAFETY - O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Did not have to be assisted or rescued</b>	97.2%	98.6%	100.0%	99.0%	100.0%	99.2%	86.7%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	2.8%	1.4%	0.0%	1.0%	0.0%	0.8%	13.3%
<b>Yes, while snorkeling using a full-face snorkel mask</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>BASE</b>	184	214	24	98	49	121	7

# CAR RENTAL - O'AHU



# REASONS FOR PARTIAL RENTAL CAR - O‘AHU

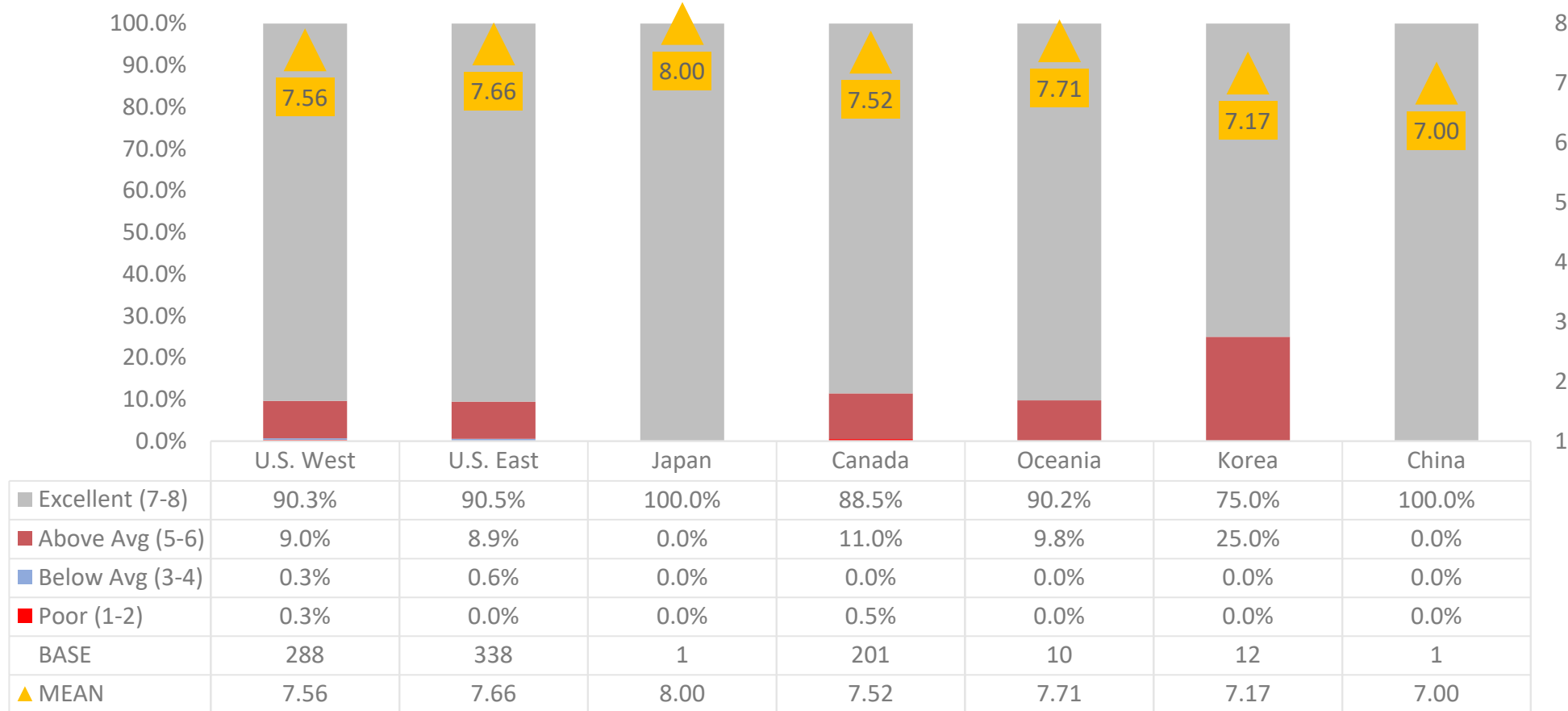
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Parking was too expensive at my hotel/ lodging	52.8%	32.8%	9.9%	44.1%	20.3%	48.3%	77.3%
Car rental rates were too expensive	31.9%	13.8%	15.5%	27.8%	20.1%	26.7%	22.7%
I only needed a vehicle on certain dates	76.9%	80.2%	87.4%	75.1%	79.7%	66.9%	34.1%
Vehicles were not available for all of my trip dates	1.2%	2.6%	4.3%	3.0%	3.3%	5.4%	0.0%
BASE	80	116	71	68	63	80	8



# Section 6 – Kaua‘i

# SATISFACTION - KAUA'I

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



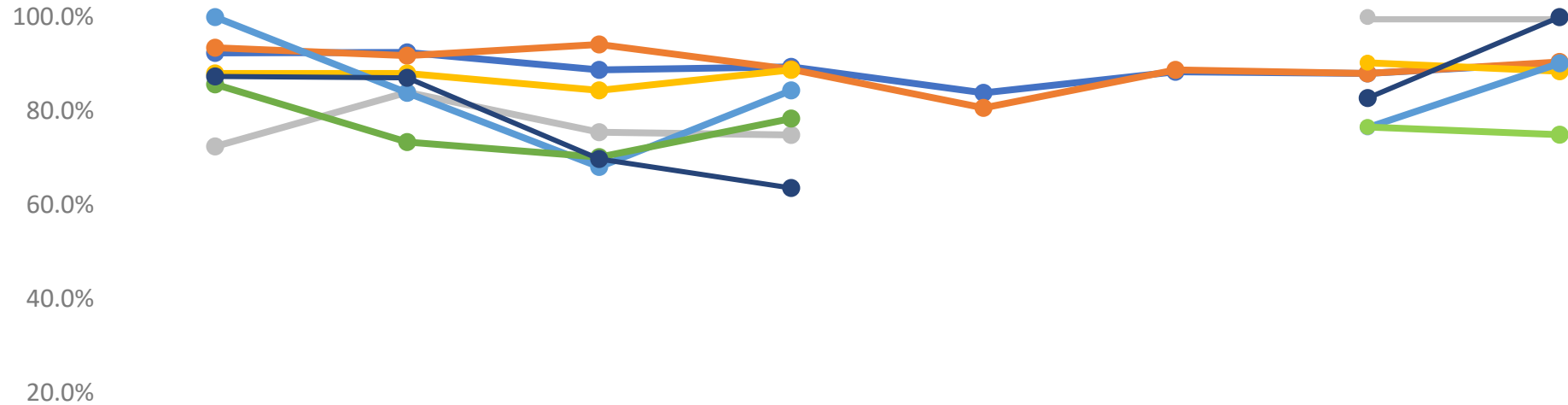


# SATISFACTION - KAUA'I

- **Household income:** Satisfaction is lowest among more affluent (\$150K+) visitors from **U.S. West**.
- **Education:** Visitors from **U.S. West** and **Oceania** without a college degree were more satisfied with their stay than those with a college degree.

# SATISFACTION - KAUA'I

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



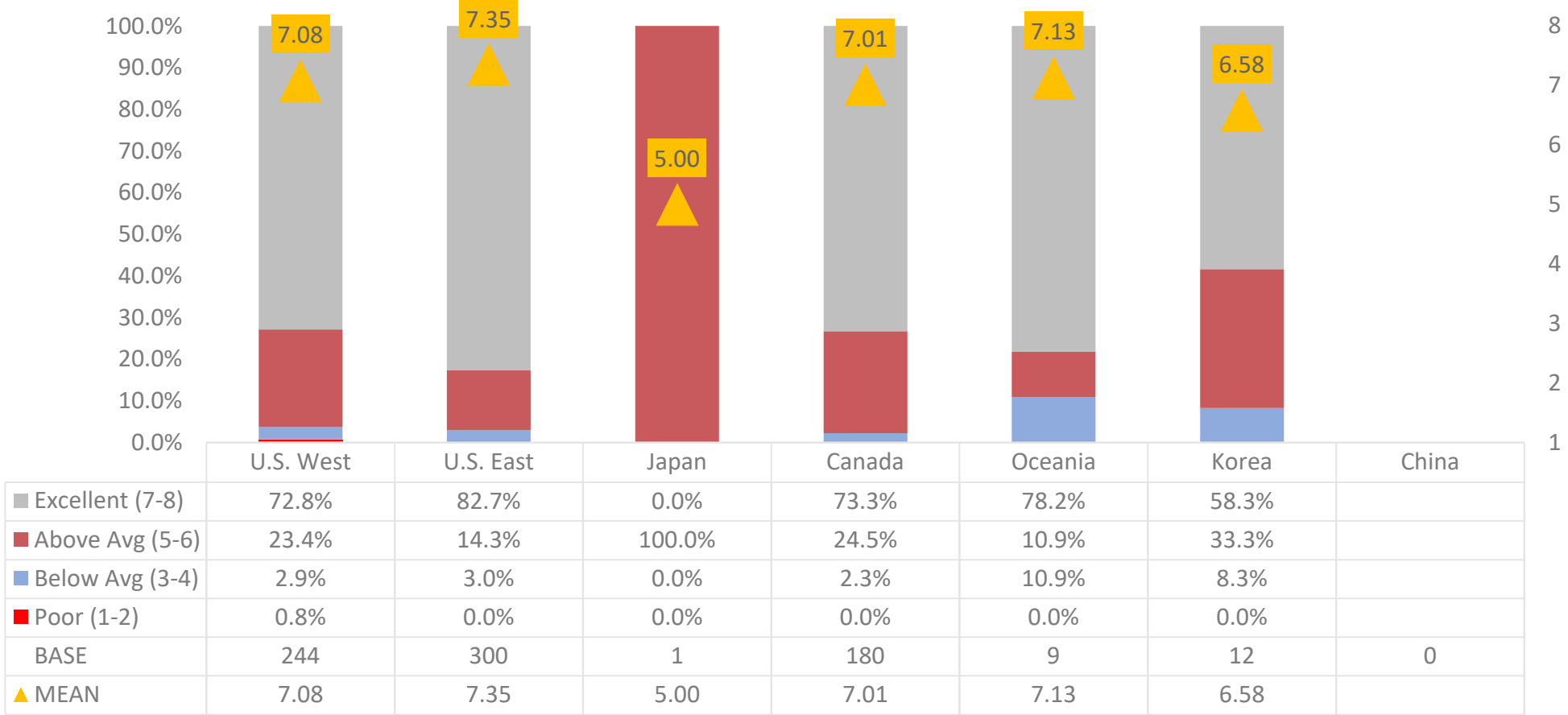
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	92.4%	92.5%	88.8%	89.4%	83.9%	88.4%	88.0%	90.3%
U.S. East	93.5%	91.8%	94.2%	88.9%	80.7%	88.8%	88.0%	90.5%
Japan	72.5%	84.0%	75.5%	74.9%			100.0%	100.0%
Canada	88.0%	88.0%	84.4%	88.8%			90.3%	88.5%
Oceania	100.0%	83.9%	68.1%	84.4%			76.5%	90.2%
Korea	85.7%	73.4%	70.2%	78.4%			76.6%	75.0%
China	87.4%	87.1%	69.8%	63.6%			82.8%	100.0%

P= Preliminary Data

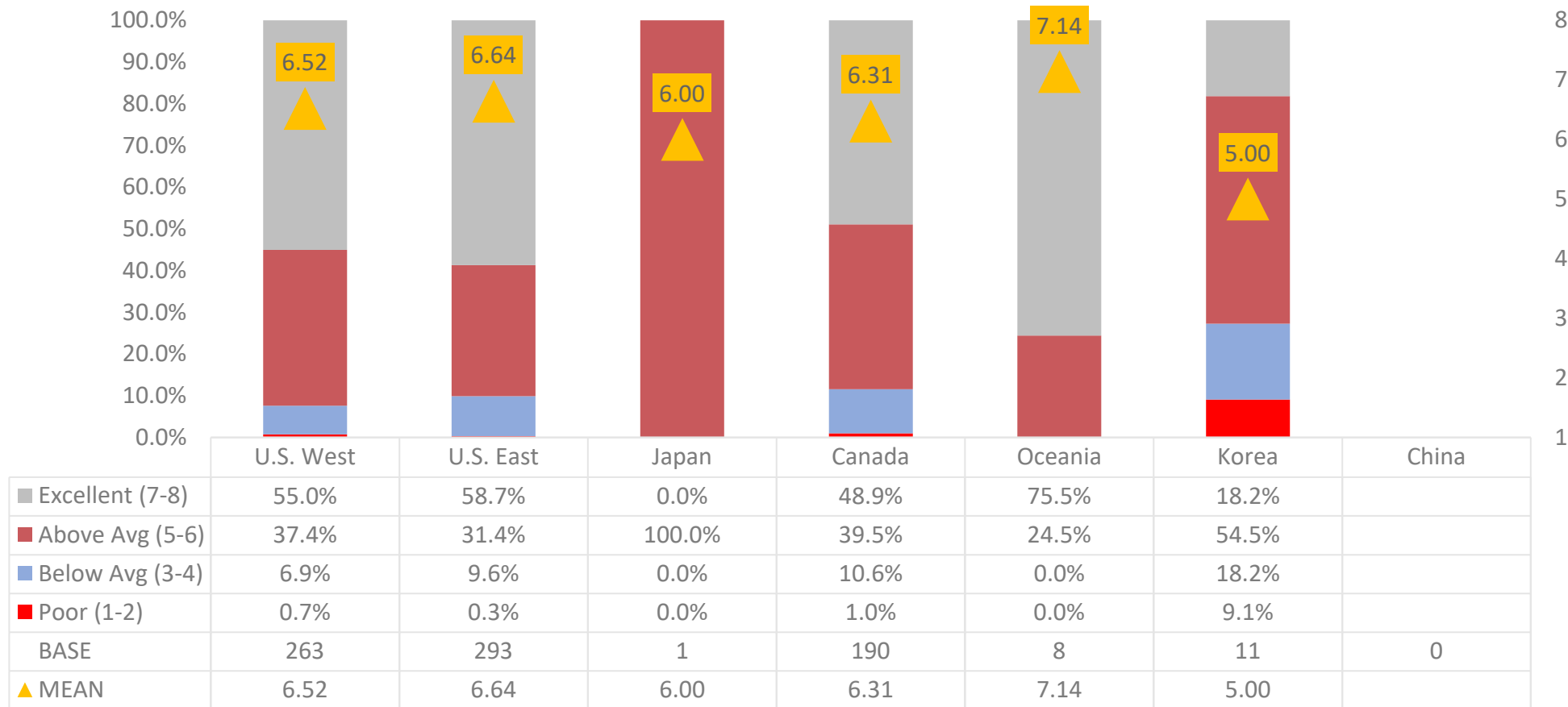
# ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



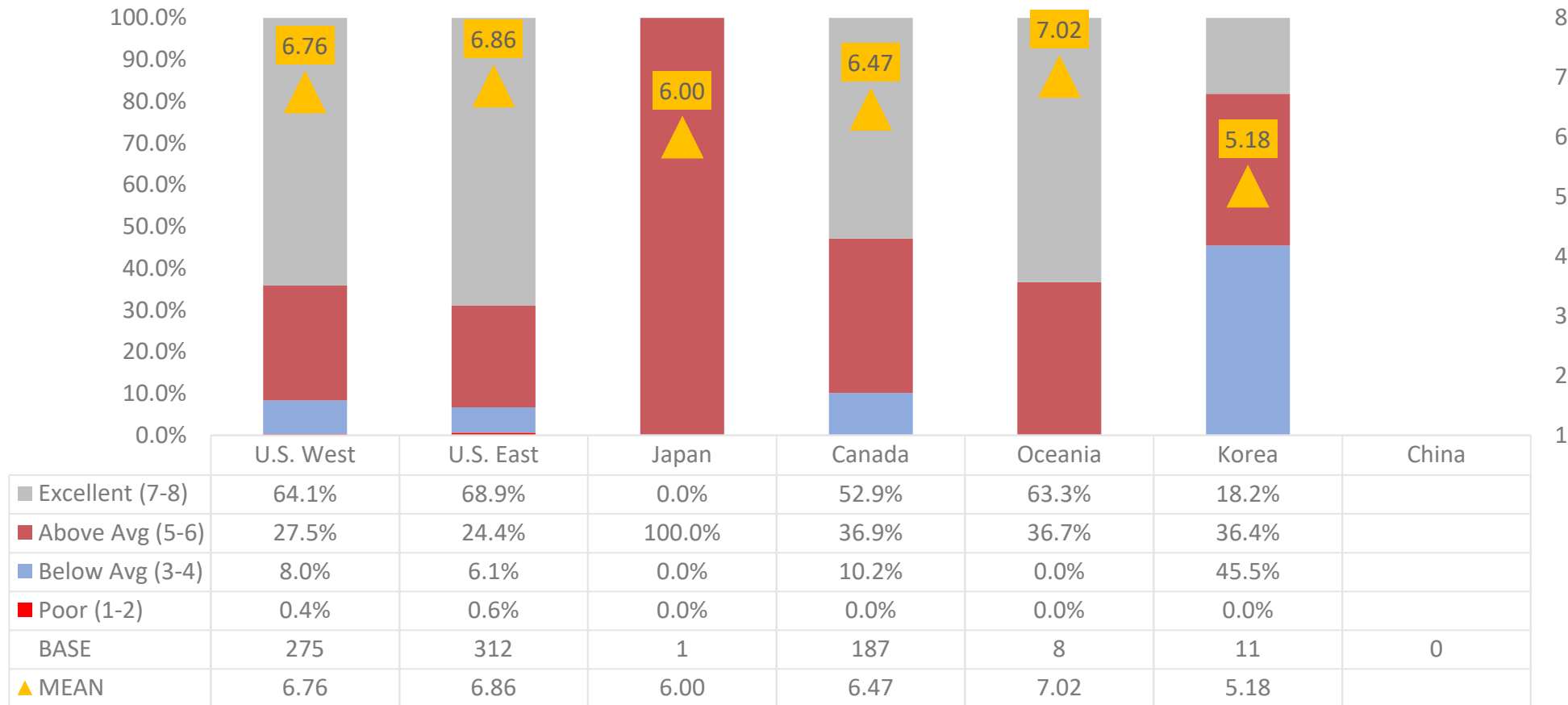
# SHOPPING - KAUA'I

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



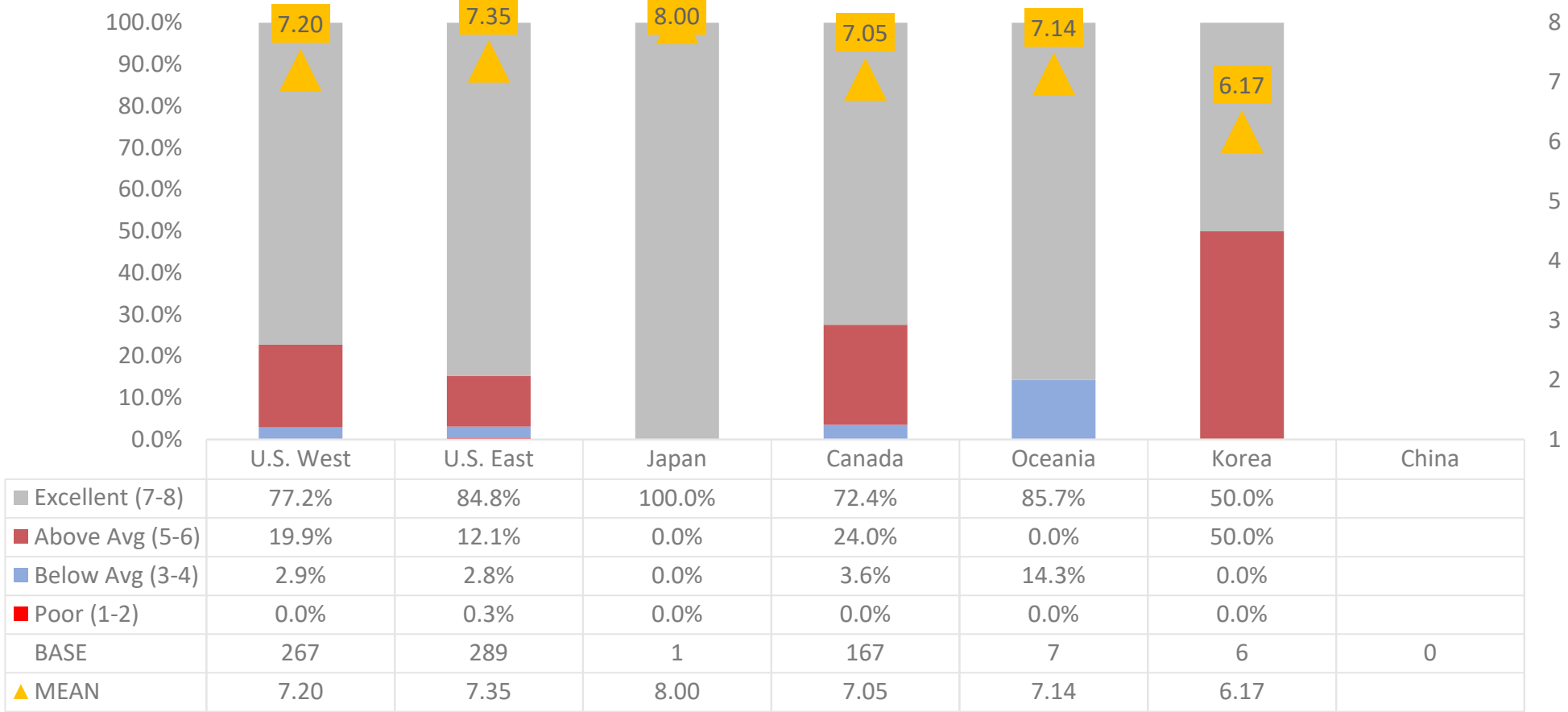
# DINING/ FOOD & BEVERAGE - KAUA'I

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



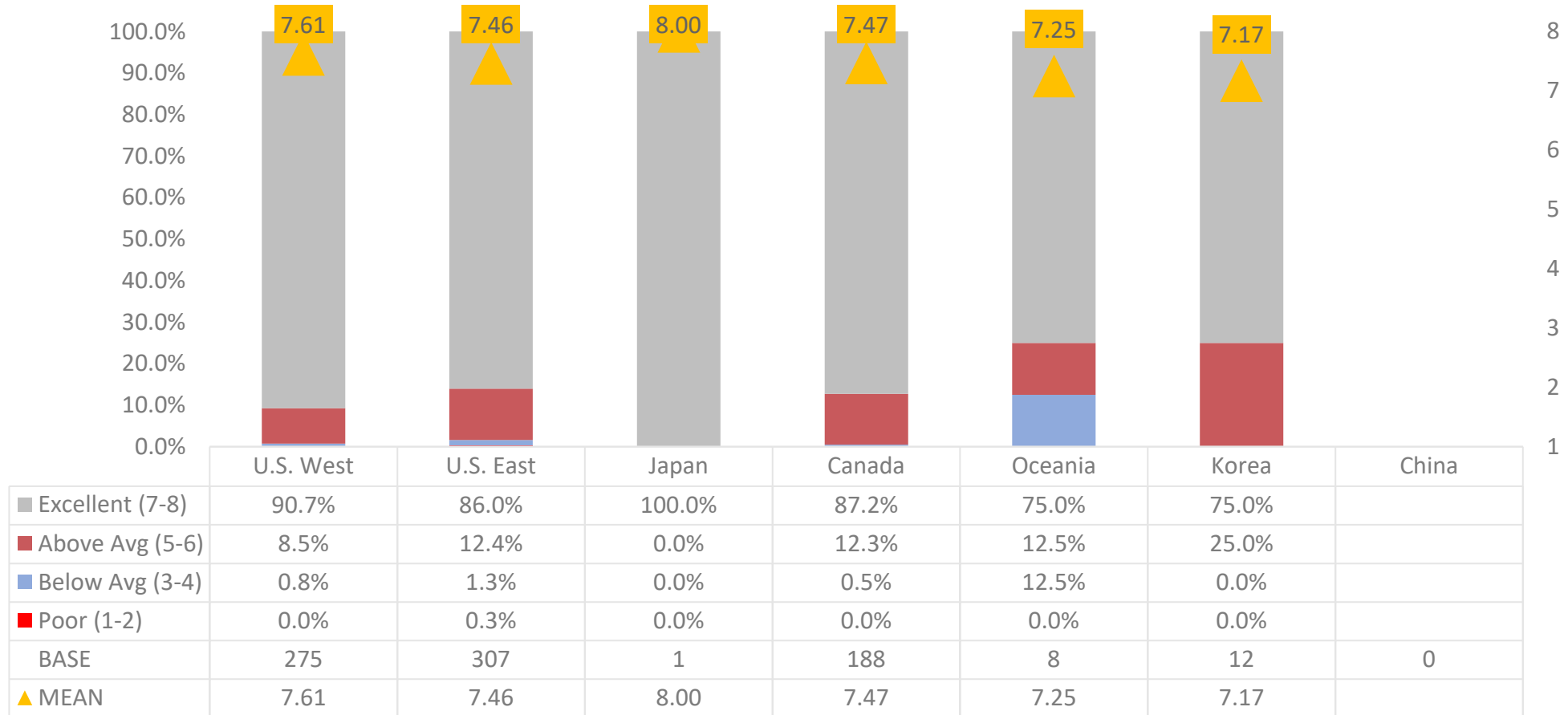
# LODGING/ ACCOMMODATIONS - KAUA'I

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



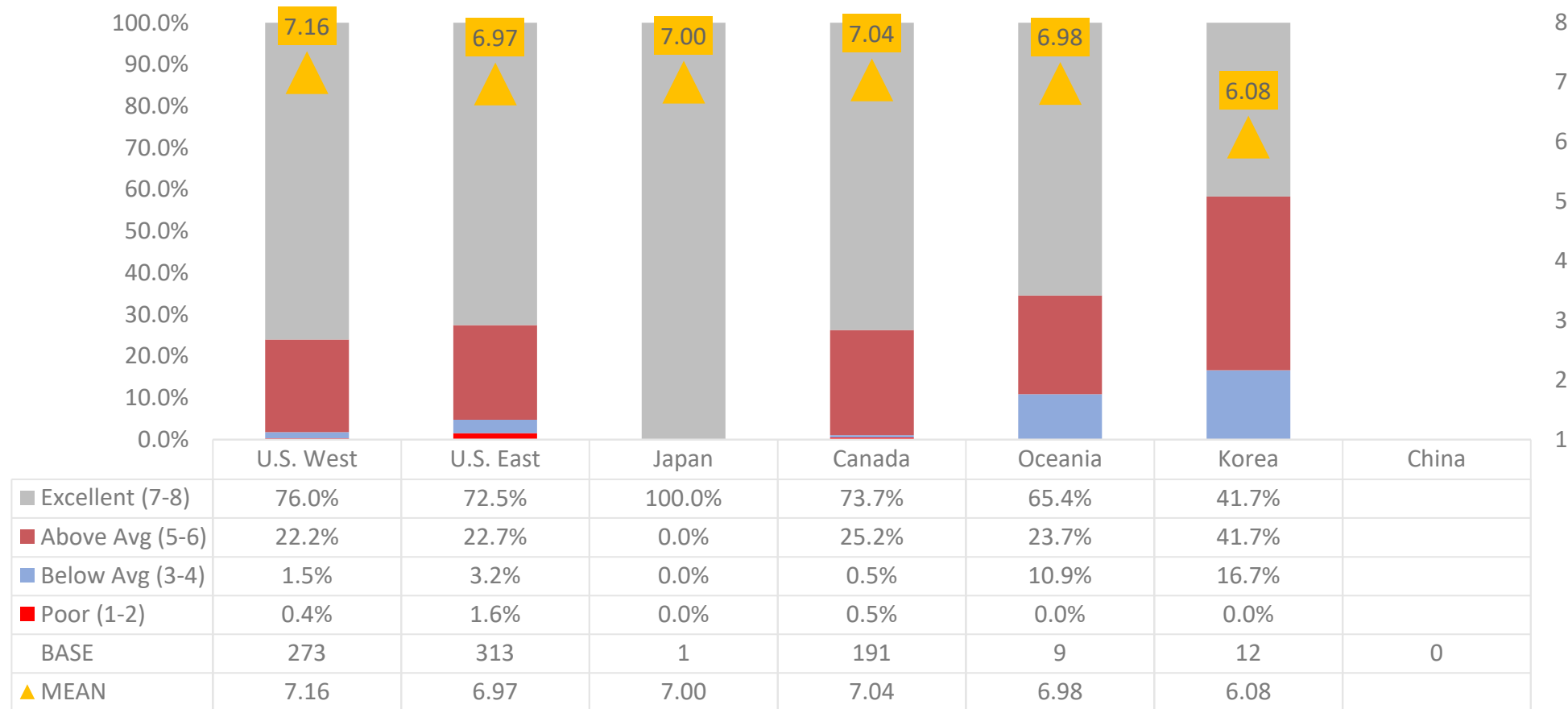
# BEACHES - KAUA'I

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



# PUBLIC AREAS - KAUA'I

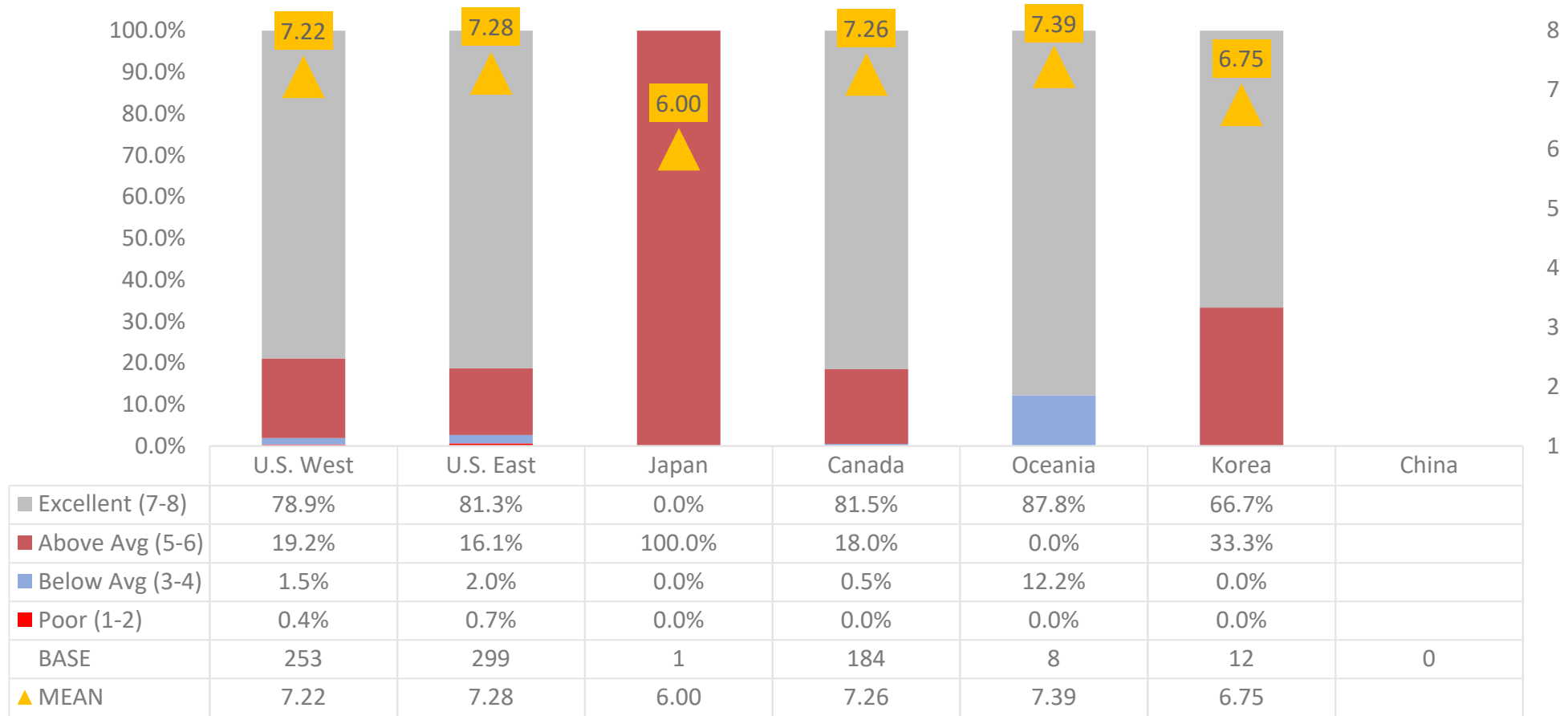
8-pt Rating Scale  
8 = Excellent / 1 = Poor





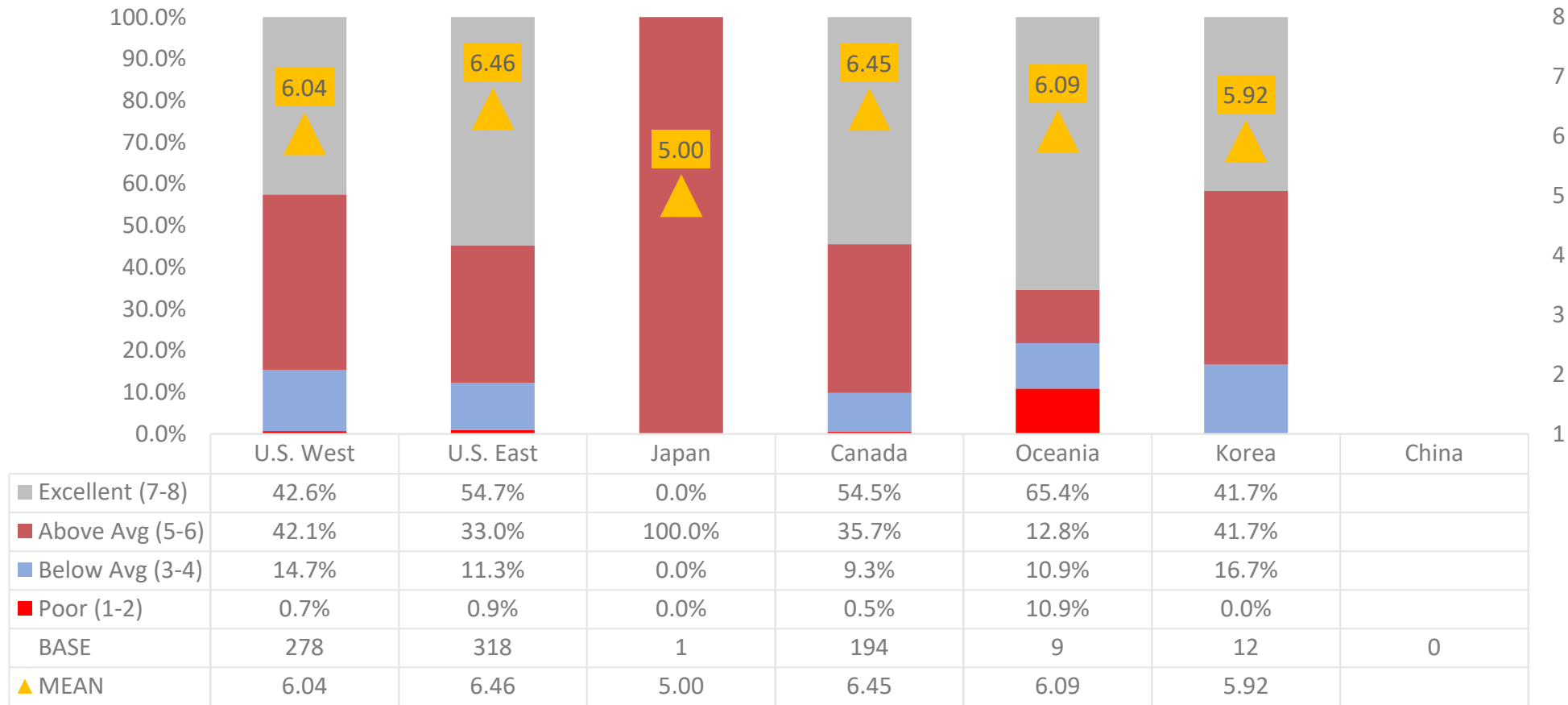
# PARKS - KAUA'I

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



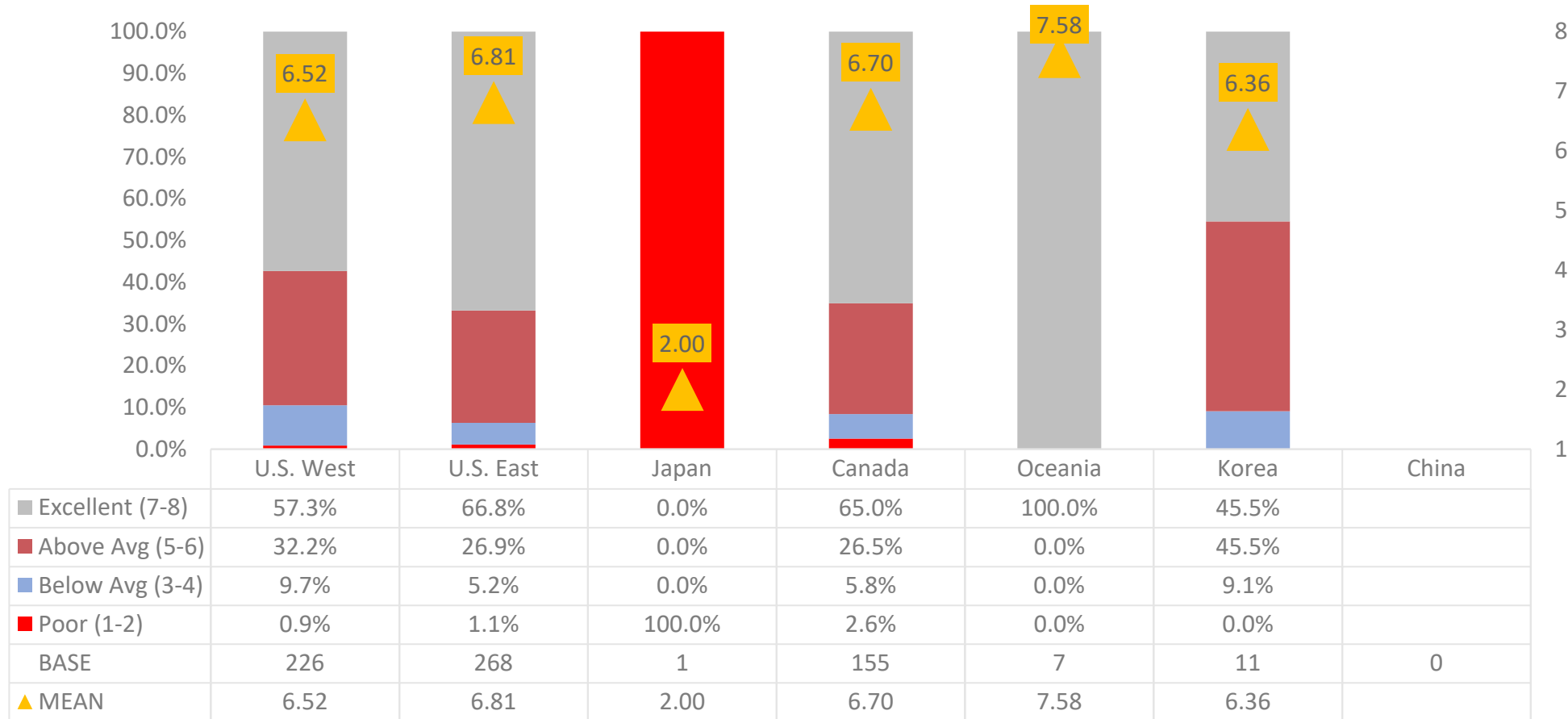
# ROADS - KAUA'I

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



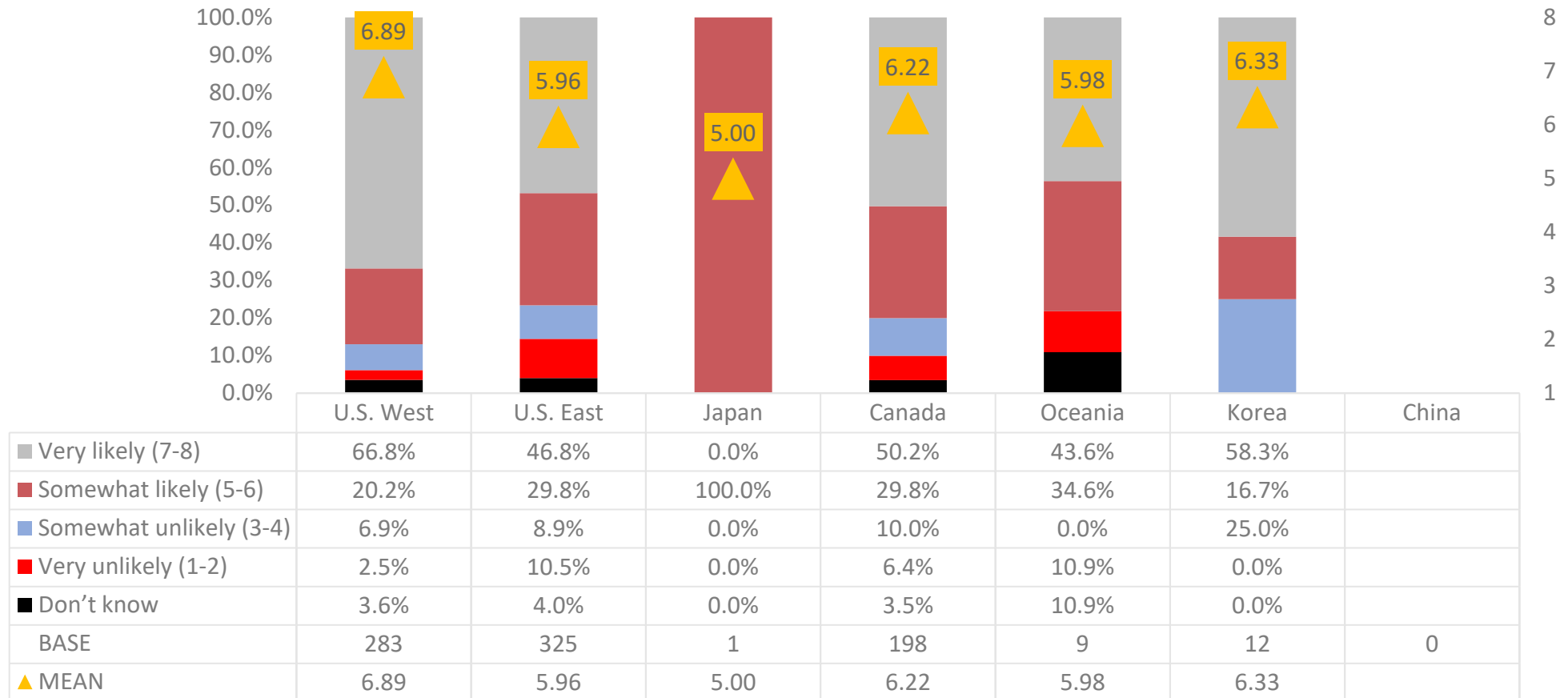
# TRANSPORTATION ON ISLAND - KAUA'I

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



# LIKELIHOOD OF RETURN VISIT - KAUA'I

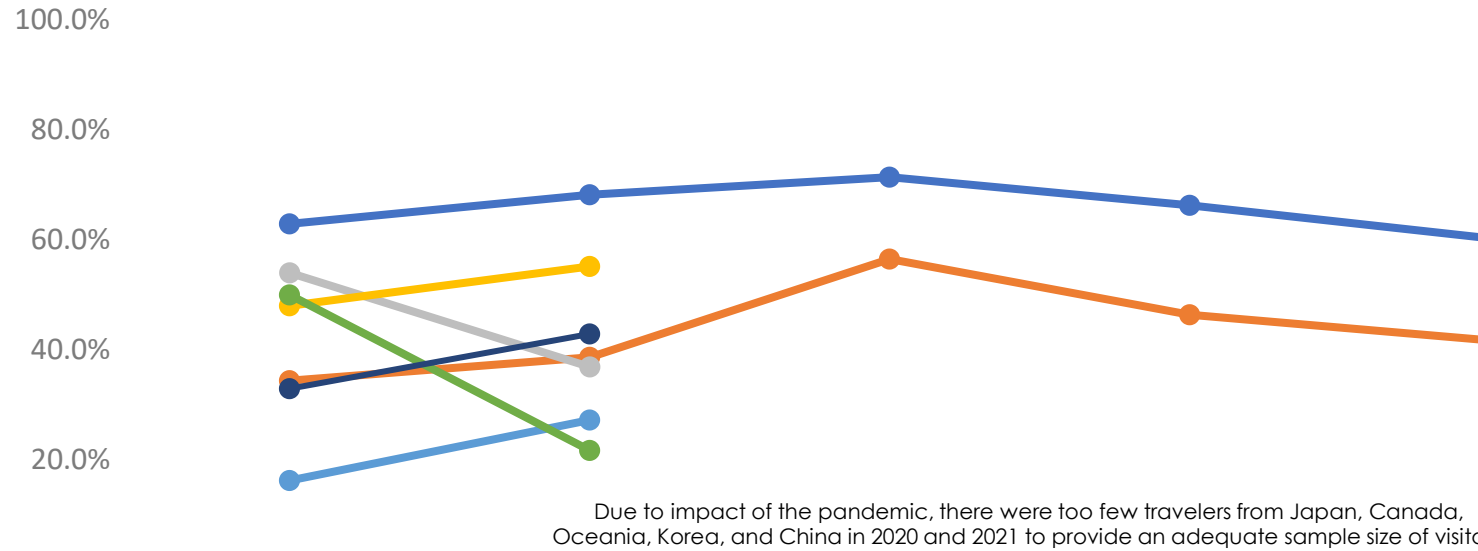
8-pt Rating Scale  
8 = Very likely / 1 = Very unlikely



# LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

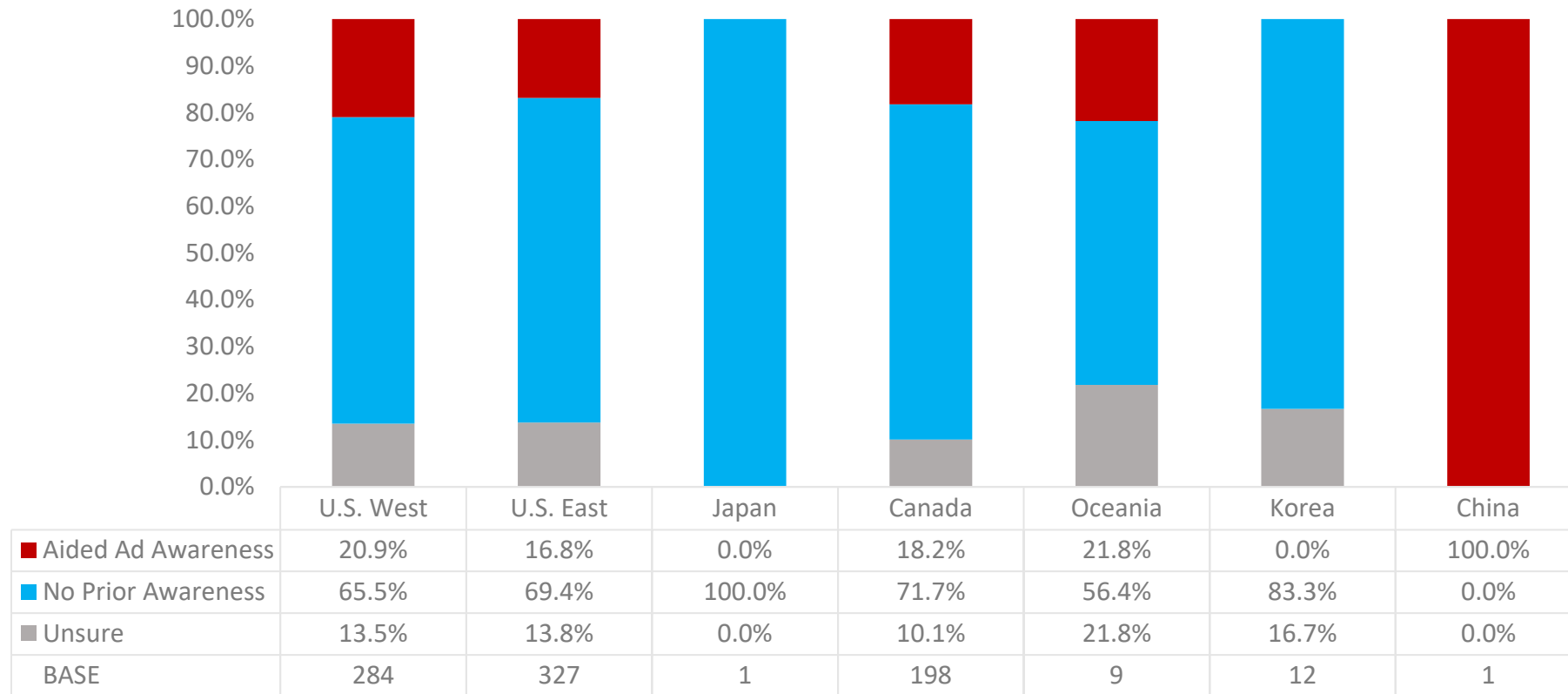
No Japanese visitors provided a Top Box score in Q4 2023  
No Chinese visitors responded to this question in Q4 2023



	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	62.9%	68.2%	71.4%	66.3%	60.3%	66.8%
U.S. East	34.4%	38.6%	56.5%	46.4%	41.7%	46.8%
Japan	54.0%	36.9%			100.0%	0.0%
Canada	48.0%	55.2%			46.8%	50.2%
Oceania	16.2%	27.2%			40.1%	43.3%
Korea	50.0%	21.7%			53.1%	58.3%
China	32.9%	42.9%			43.7%	0.0%

P= Preliminary Data

# AIDED ADVERTISING AWARENESS - KAUA'I



# MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Famous landmarks or imagery/ natural beauty</b>	40.4%	44.7%	100.0%	38.3%	56.4%	25.0%	0.0%
<b>Hawaiian cultural events</b>	4.5%	7.3%	0.0%	7.1%	21.8%	0.0%	0.0%
<b>Outdoor or sporting activities and events</b>	14.4%	13.8%	0.0%	12.6%	32.7%	0.0%	0.0%
<b>Social media posts and videos</b>	7.0%	8.9%	0.0%	4.0%	34.6%	0.0%	0.0%
<b>Hawaiian music</b>	4.9%	4.6%	0.0%	5.1%	0.0%	0.0%	0.0%
<b>Television programs or movies filmed in Hawai'i</b>	4.6%	6.4%	0.0%	5.5%	0.0%	16.7%	0.0%
<b>BASE</b>	284	327	1	198	9	12	1

# ATTRACTIONS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China*
<b>Fern Grotto</b>	9.3%	12.0%	0.0%	12.6%	32.7%	8.3%	0.0%
<b>Hanalei Town</b>	52.9%	47.1%	100.0%	53.4%	32.7%	16.7%	0.0%
<b>Hanalei Beach</b>	51.4%	44.9%	100.0%	55.4%	32.7%	16.7%	0.0%
<b>Kalapaki Beach</b>	22.6%	25.9%	0.0%	29.4%	10.9%	16.7%	0.0%
<b>Kalalau Trail</b>	12.6%	12.6%	0.0%	20.7%	0.0%	8.3%	0.0%
<b>Bike Path in Kapa'a</b>	9.1%	8.0%	0.0%	11.8%	10.9%	0.0%	0.0%
<b>Kaua'i Museum</b>	6.1%	4.3%	0.0%	4.0%	0.0%	8.3%	0.0%
<b>Ke'e Beach</b>	12.7%	8.9%	0.0%	11.2%	0.0%	0.0%	0.0%
<b>Kīlauea Lighthouse</b>	25.2%	27.4%	100.0%	26.5%	10.9%	8.3%	0.0%
<b>Kōke'e</b>	8.2%	10.2%	0.0%	13.2%	0.0%	0.0%	0.0%

\* No Chinese visitors responded to this question in Q4 2023



# ATTRACTIONS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China*
<b>Kōke'e Museum</b>	2.9%	3.4%	0.0%	4.5%	0.0%	0.0%	0.0%
<b>Na 'Āina Kai Gardens</b>	1.7%	2.8%	0.0%	2.0%	10.9%	0.0%	0.0%
<b>Nāpali Coast</b>	29.9%	49.8%	0.0%	35.9%	32.7%	0.0%	0.0%
<b>Allerton Garden</b>	7.6%	12.0%	0.0%	10.2%	0.0%	0.0%	0.0%
<b>Limahuli Garden</b>	5.0%	5.5%	0.0%	4.0%	0.0%	0.0%	0.0%
<b>Old Kōloa Town</b>	41.5%	30.8%	0.0%	43.4%	21.8%	0.0%	0.0%
<b>'Ōpaeka'a Falls</b>	18.9%	23.7%	0.0%	23.9%	0.0%	8.3%	0.0%
<b>Po'ipū Beach</b>	70.7%	63.7%	0.0%	66.6%	43.6%	25.0%	0.0%
<b>Smith's Tropical Paradise Gardens</b>	6.7%	7.1%	0.0%	3.5%	0.0%	0.0%	0.0%
<b>Spouting Horn</b>	29.2%	31.7%	0.0%	35.2%	32.7%	16.7%	0.0%
<b>Wailua Falls</b>	32.3%	38.8%	0.0%	40.6%	21.8%	25.0%	0.0%

\* No Chinese visitors responded to this question in Q4 2023

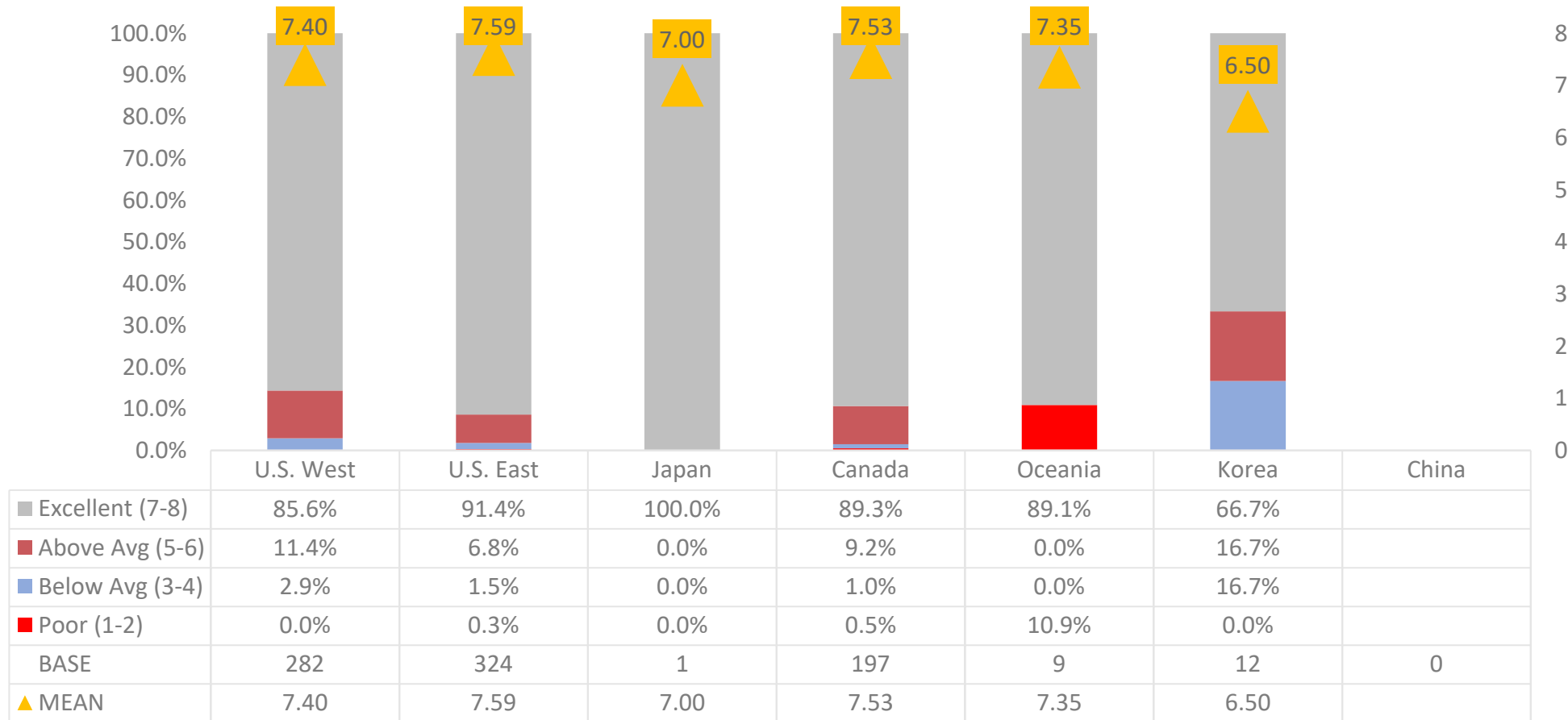
# ATTRACTIONS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China*
Wailua River	18.2%	20.0%	0.0%	20.3%	10.9%	16.7%	0.0%
Waimea Canyon	45.4%	59.1%	0.0%	58.8%	56.4%	58.3%	0.0%
Disc Golf	0.4%	0.9%	0.0%	1.5%	0.0%	0.0%	0.0%
Mini Golf	2.2%	0.9%	0.0%	1.0%	0.0%	0.0%	0.0%

\* No Chinese visitors responded to this question in Q4 2023

# FRIENDLINESS OF KAUA‘I RESIDENTS

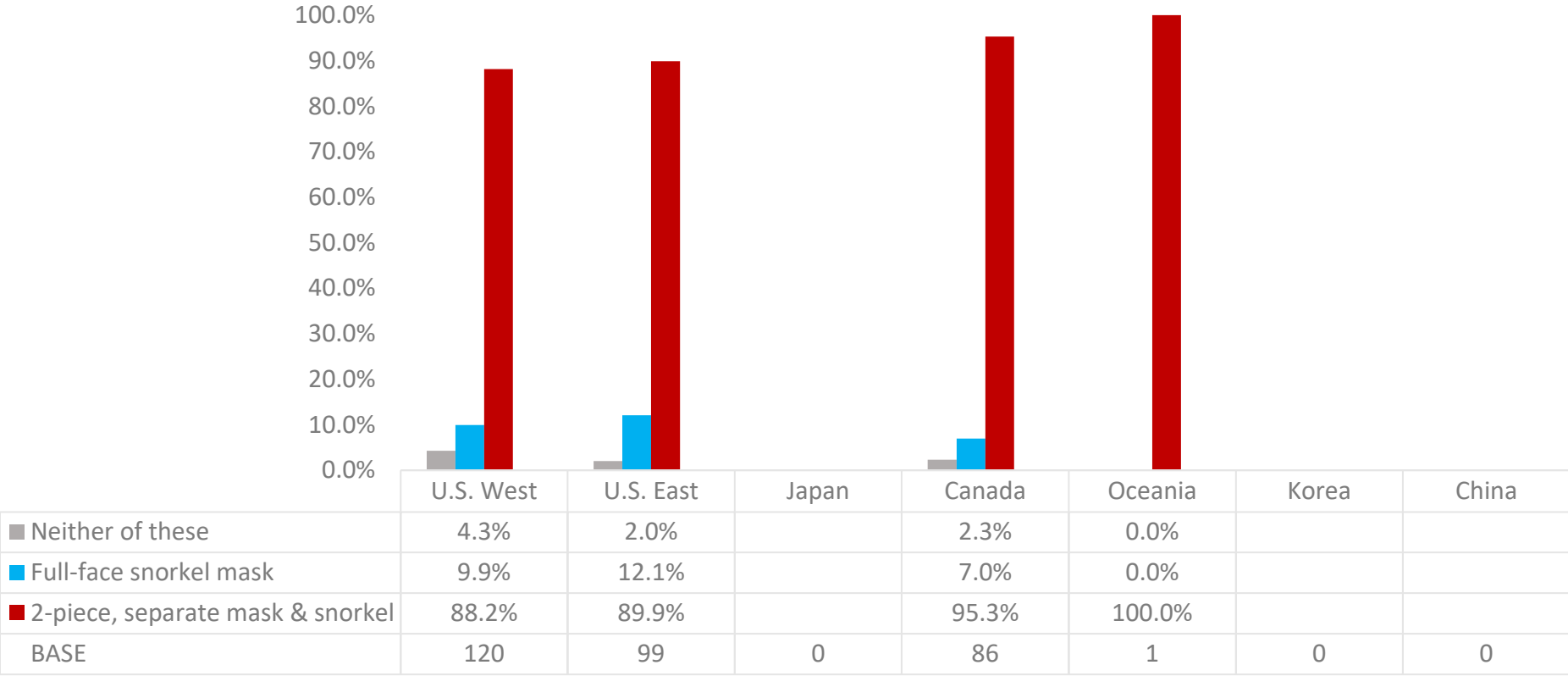
8-pt Rating Scale  
8=Excellent / 1=Poor



# TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China*
Been here before	44.1%	30.0%	0.0%	36.5%	21.8%	0.0%	0.0%
Friend recommendation	28.2%	28.7%	0.0%	29.8%	10.9%	25.0%	0.0%
Cruise line stop/part of tour	2.5%	10.5%	0.0%	12.0%	23.7%	0.0%	0.0%
Visiting Family/ Friends	5.8%	2.5%	0.0%	3.6%	0.0%	0.0%	0.0%
Own a timeshare	3.5%	1.9%	0.0%	2.6%	0.0%	0.0%	0.0%
Attending Conference/ Event	2.5%	2.8%	0.0%	3.0%	0.0%	0.0%	0.0%
Travel Agent	1.2%	3.7%	0.0%	2.0%	10.9%	75.0%	0.0%
Social Media Post	3.1%	1.2%	0.0%	1.5%	10.9%	0.0%	0.0%
Location/ Never been, but went to other islands	2.4%	2.5%	0.0%	1.5%	0.0%	0.0%	0.0%

# SNORKELING EQUIPMENT USED - KAUA'I



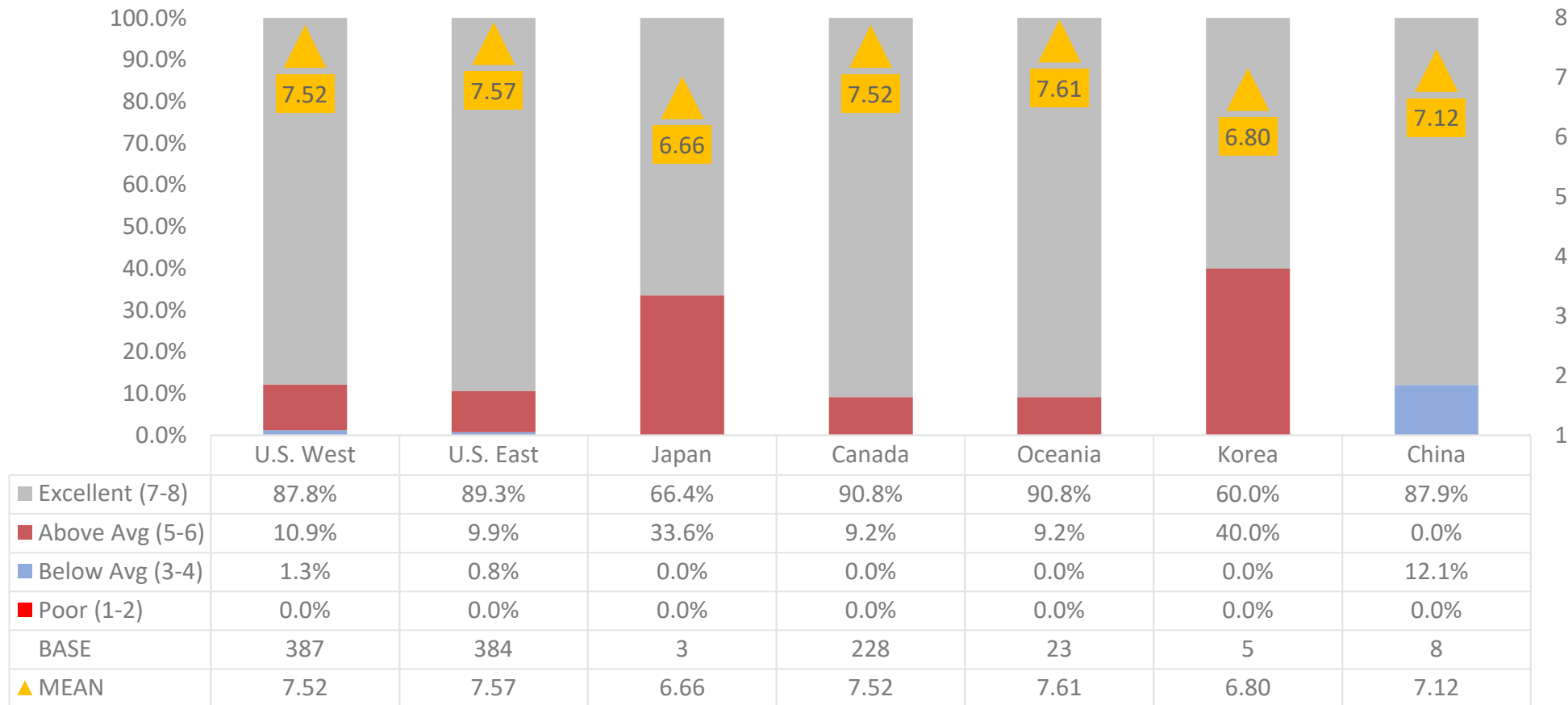
# SNORKELING OCEAN SAFETY - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Did not have to be assisted or rescued	99.2%	96.9%	-	98.8%	100.0%	-	-
Yes, needed assistance – using 2-piece mask & snorkel	0.8%	3.1%	-	1.2%	0.0%	-	-
Yes, while snorkeling using a full-face snorkel mask	0.0%	0.0%	-	0.0%	0.0%	-	-
BASE	115	97	0	84	1	0	0

# Section 7 – Maui

# SATISFACTION - MAUI

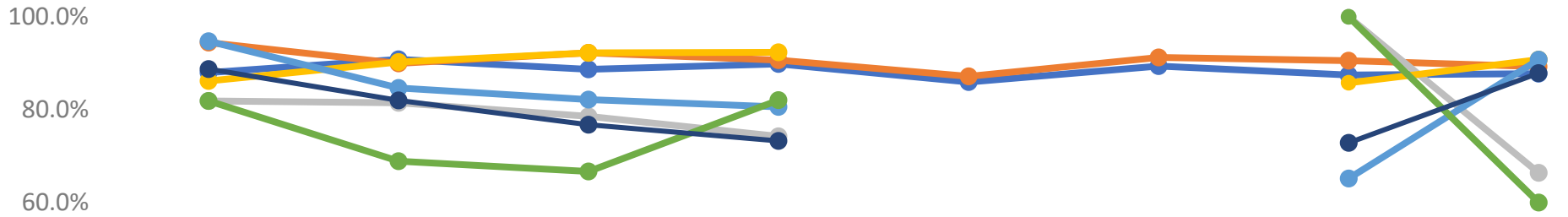
8-pt Rating Scale  
8 = Excellent / 1 = Poor





# 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.

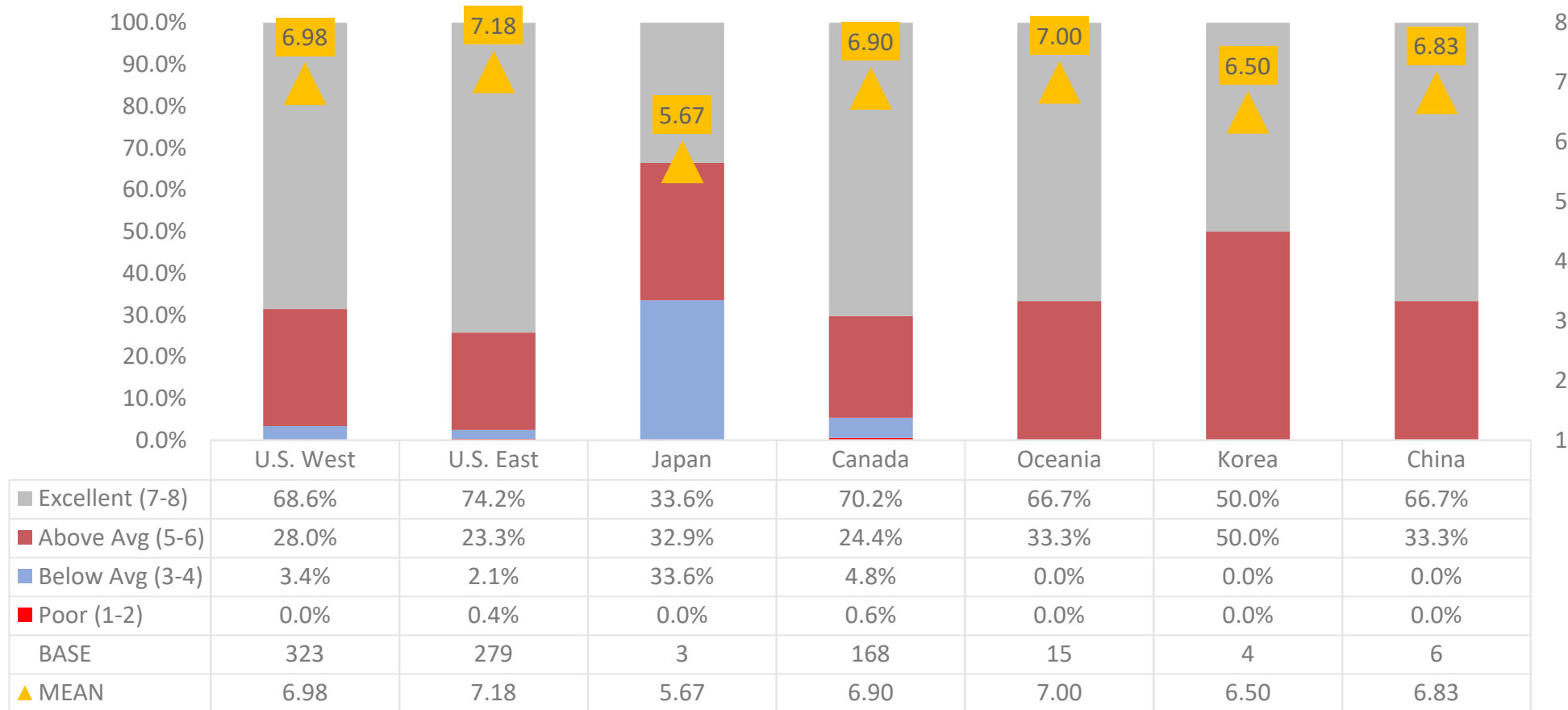
	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	88.0%	90.9%	88.7%	89.9%	86.0%	89.4%	87.5%	87.8%
U.S. East	94.5%	90.0%	92.3%	90.7%	87.2%	91.3%	90.6%	89.3%
Japan	81.9%	81.5%	78.6%	74.3%			100.0%	66.4%
Canada	86.2%	90.3%	92.3%	92.4%			85.8%	90.8%
Oceania	94.8%	84.7%	82.2%	80.6%			65.2%	90.8%
Korea	81.9%	68.9%	66.7%	82.1%			100.0%	60.0%
China	88.8%	82.0%	76.8%	73.3%			72.9%	87.9%

P= Preliminary Data



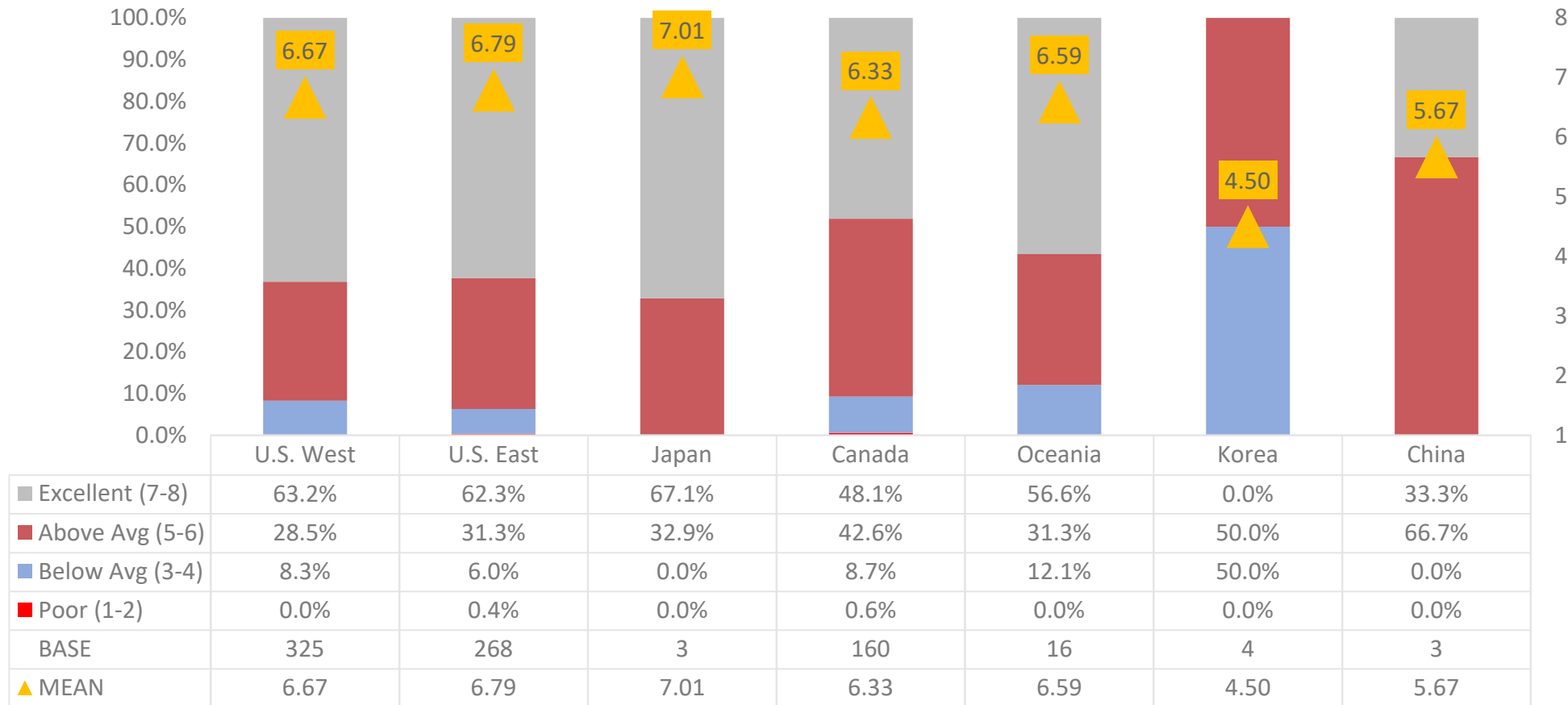
# ENTERTAINMENT/ ATTRACTIONS - MAUI

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



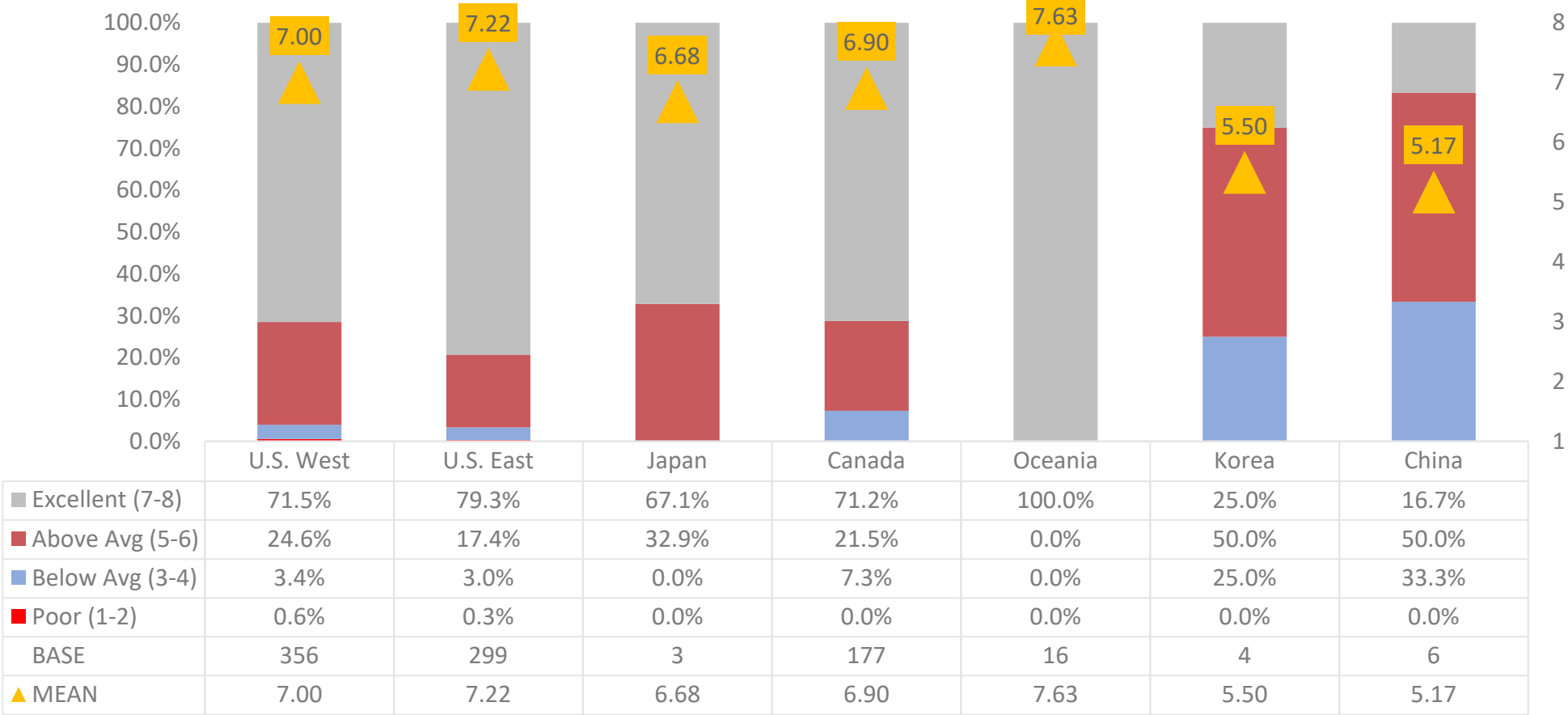
# SHOPPING - MAUI

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



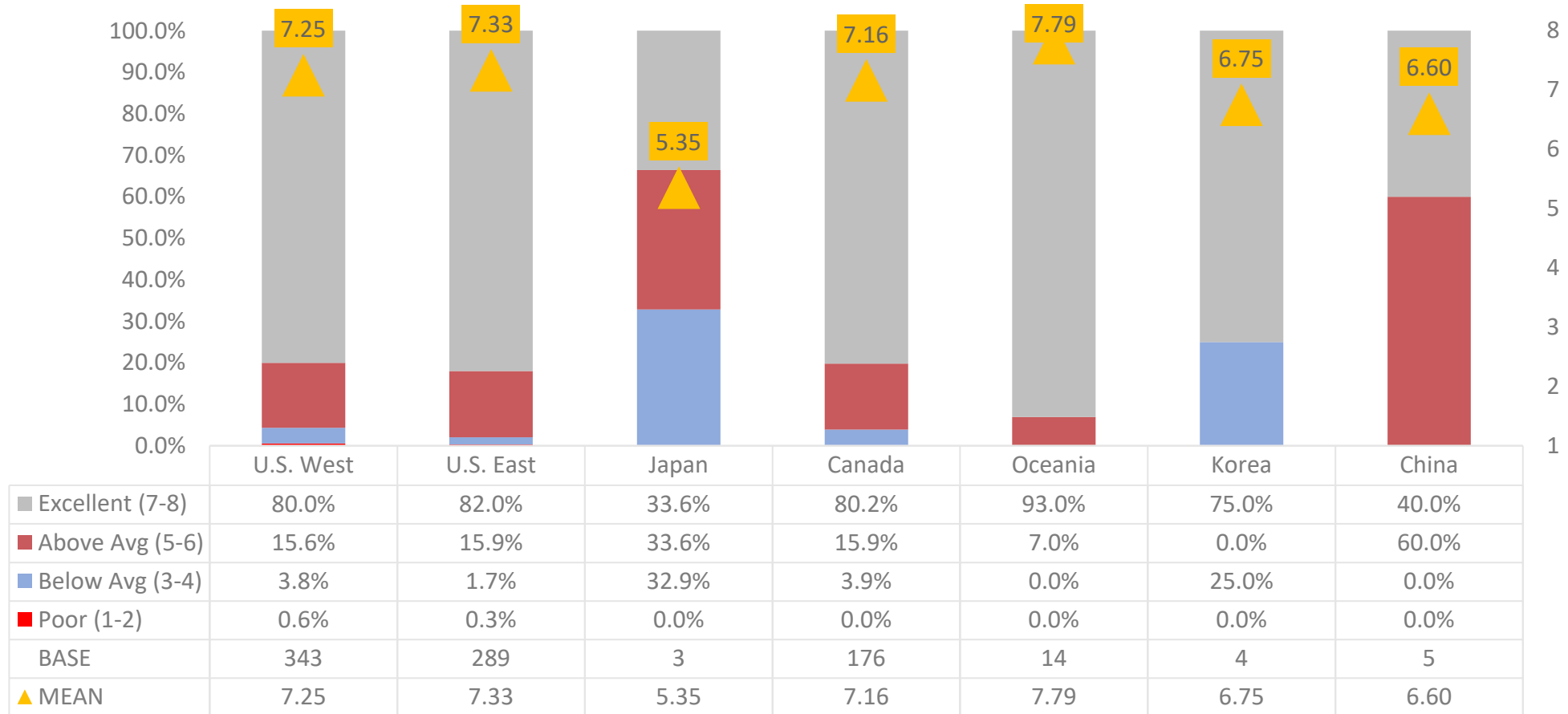
# DINING/ FOOD & BEVERAGE - MAUI

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



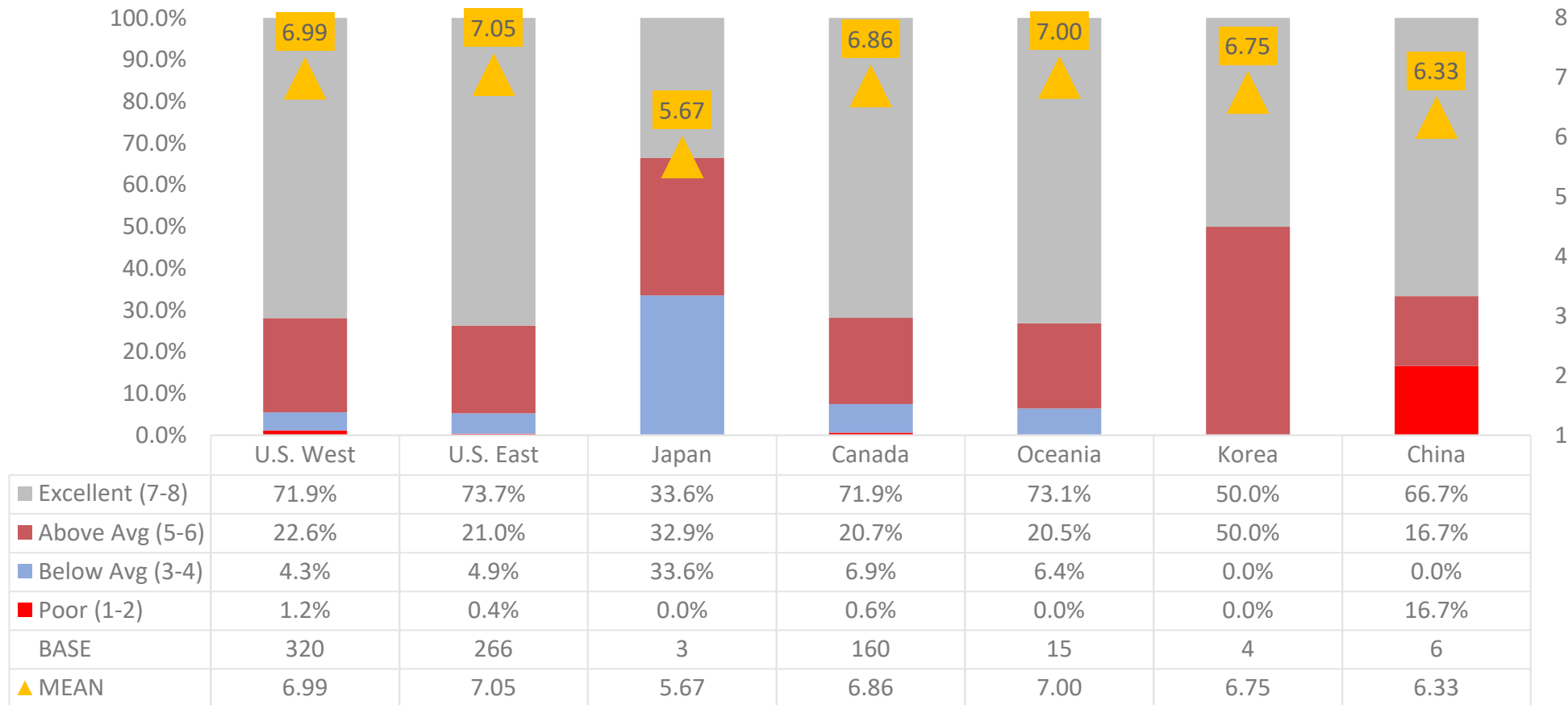
# LODGING/ ACCOMMODATIONS - MAUI

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



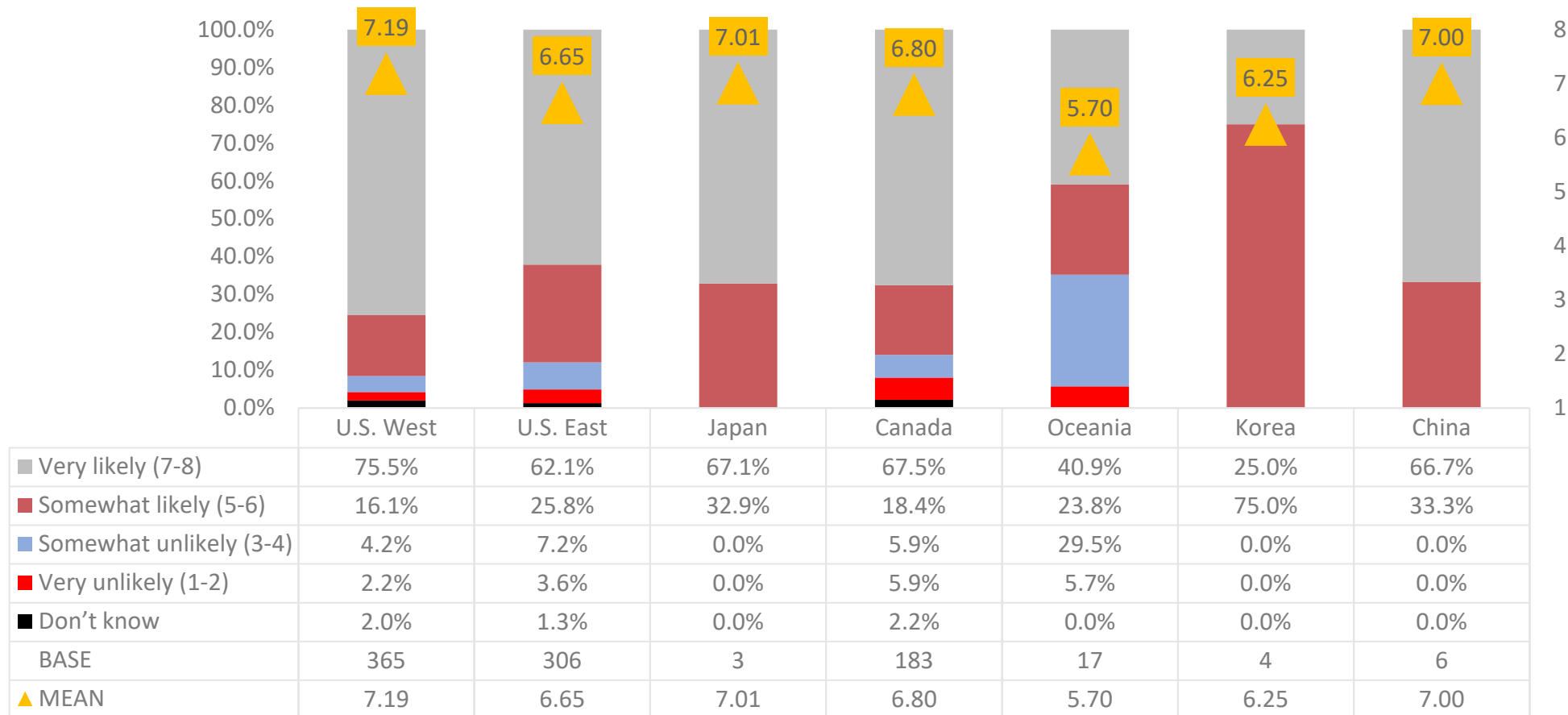
# TRANSPORTATION ON ISLAND - MAUI

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



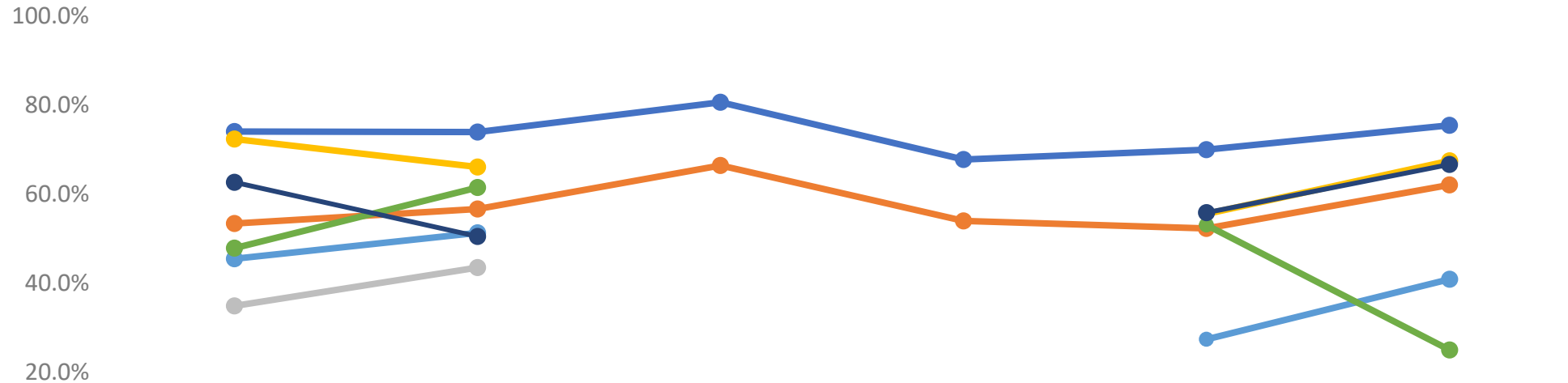
# LIKELIHOOD OF RETURN VISIT - MAUI

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



# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



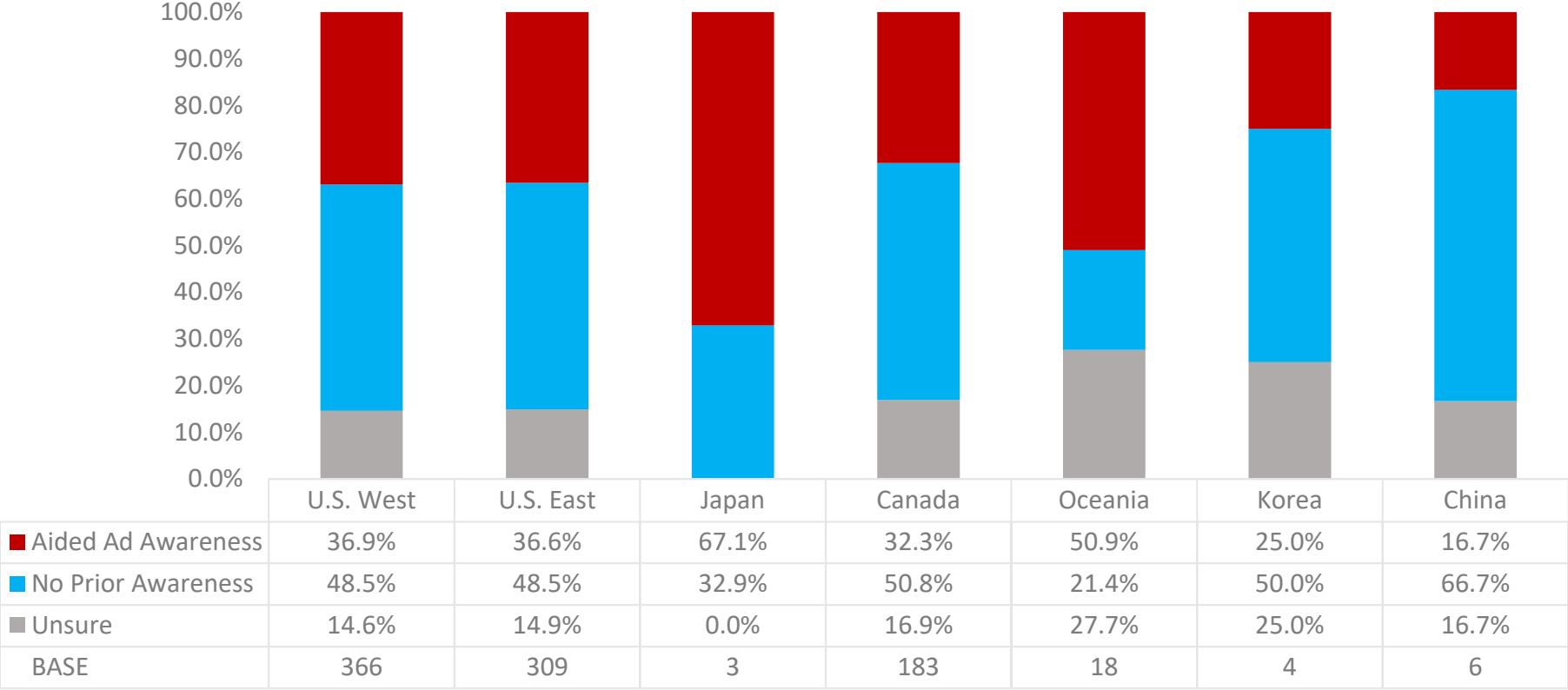
Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	74.1%	74.0%	80.7%	67.8%	70.0%	75.5%
U.S. East	53.4%	56.7%	66.5%	54.0%	52.3%	62.1%
Japan	34.9%	43.5%			0.0%	67.1%
Canada	72.4%	66.1%			55.6%	67.5%
Oceania	45.5%	51.3%			27.4%	40.9%
Korea	47.9%	61.5%			53.1%	25.0%
China	62.7%	50.5%			55.9%	66.7%

P= Preliminary Data



# AIDED ADVERTISING AWARENESS - MAUI



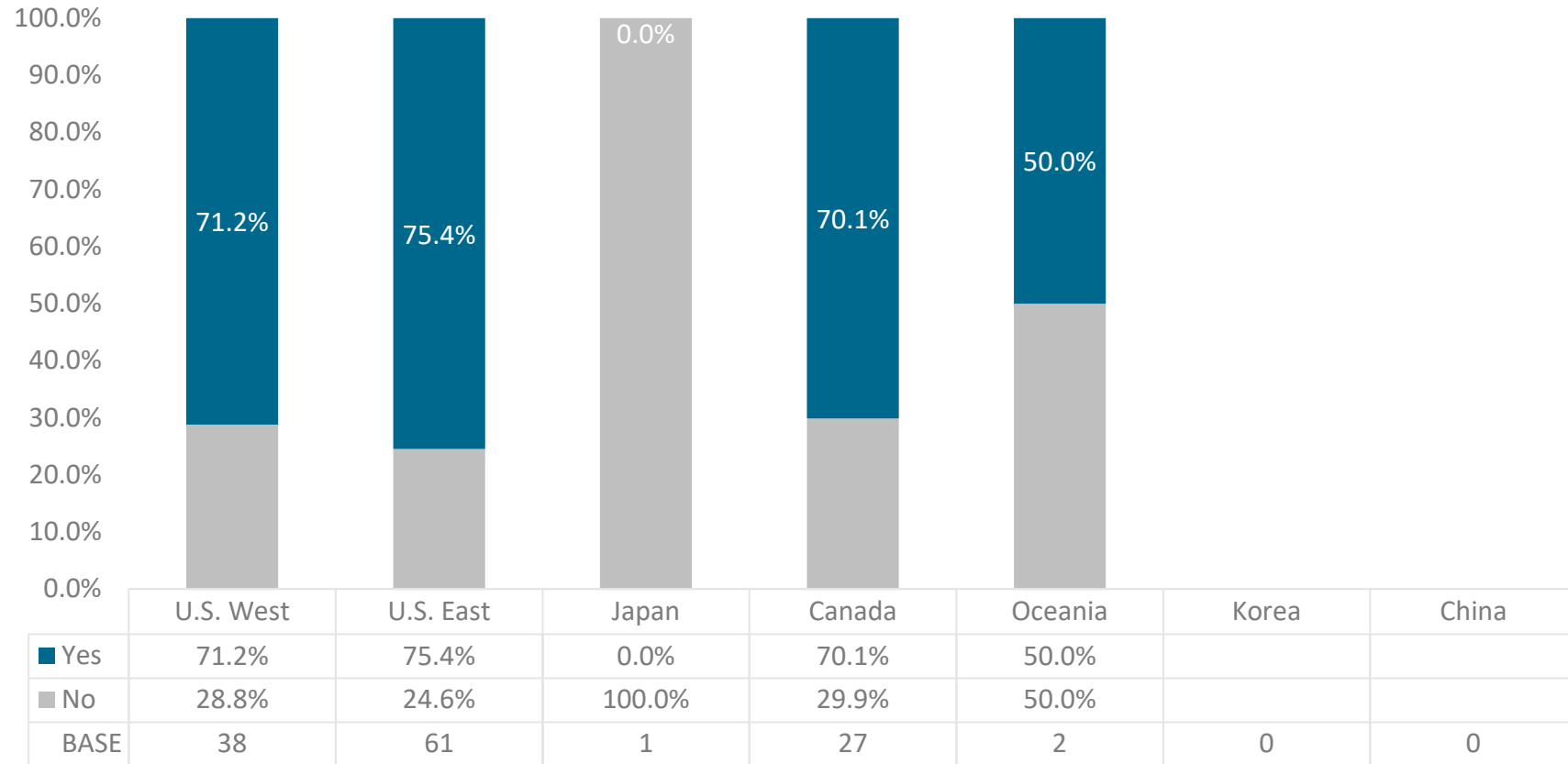
# MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Famous landmarks or imagery/ natural beauty</b>	32.6%	43.4%	0.0%	34.4%	60.7%	75.0%	66.7%
<b>Hawaiian cultural events</b>	7.8%	11.0%	33.6%	8.2%	11.6%	0.0%	0.0%
<b>Outdoor or sporting activities and events</b>	18.0%	13.9%	0.0%	15.9%	23.3%	0.0%	33.3%
<b>Social media posts and videos</b>	9.5%	13.6%	0.0%	10.3%	17.0%	0.0%	16.7%
<b>Hawaiian music</b>	6.5%	10.4%	0.0%	6.6%	17.0%	0.0%	0.0%
<b>Television programs or movies filmed in Hawai'i</b>	3.3%	7.8%	32.9%	6.5%	27.7%	25.0%	0.0%
<b>BASE</b>	366	309	3	183	18	4	6

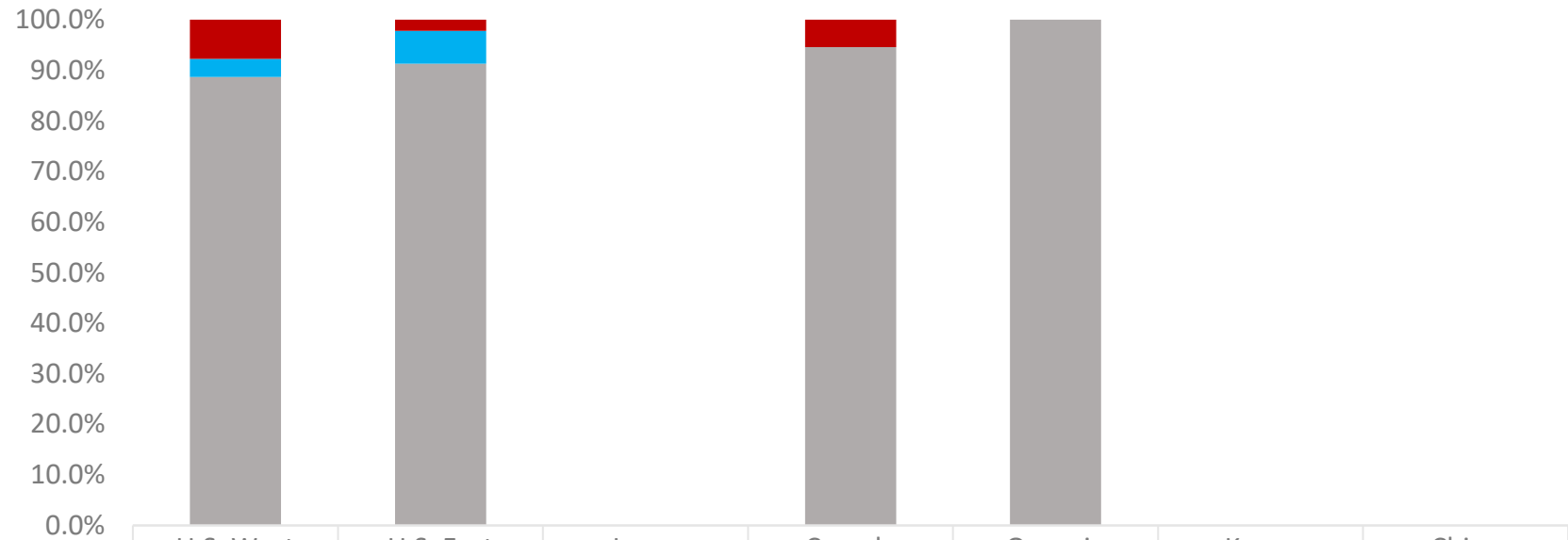
# ATTRACTIONS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Alexander & Baldwin Sugar Museum	1.4%	1.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Aquarium Maui/ Maui Ocean Center	17.0%	12.7%	33.6%	19.8%	11.4%	0.0%	16.7%
Baldwin Missionary Home Museum	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Hale Pa'i Printing House	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haleakalā National Park	24.4%	42.5%	0.0%	38.8%	40.9%	25.0%	33.3%
Haleki'i-Pihana Heiau State Monument	0.6%	1.6%	0.0%	2.2%	0.0%	0.0%	0.0%
Hana Cultural Center	6.2%	10.8%	0.0%	6.6%	12.4%	25.0%	16.7%
ĪaoValley State Monument	11.9%	14.7%	0.0%	11.0%	0.0%	0.0%	0.0%
Kepaniwai Park & Heritage Gardens	2.7%	5.2%	0.0%	5.4%	6.7%	0.0%	0.0%
Kula Botanical Garden	6.0%	7.2%	0.0%	8.2%	11.4%	0.0%	16.7%
Maui Historical Society Bailey House Museum	0.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wai'ānapanapa State Park	10.6%	19.9%	33.6%	14.7%	11.4%	0.0%	0.0%
Whaler's Village Museum	10.8%	13.4%	0.0%	11.0%	17.1%	0.0%	0.0%
Wo Hing Temple Museum	0.8%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%

# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE

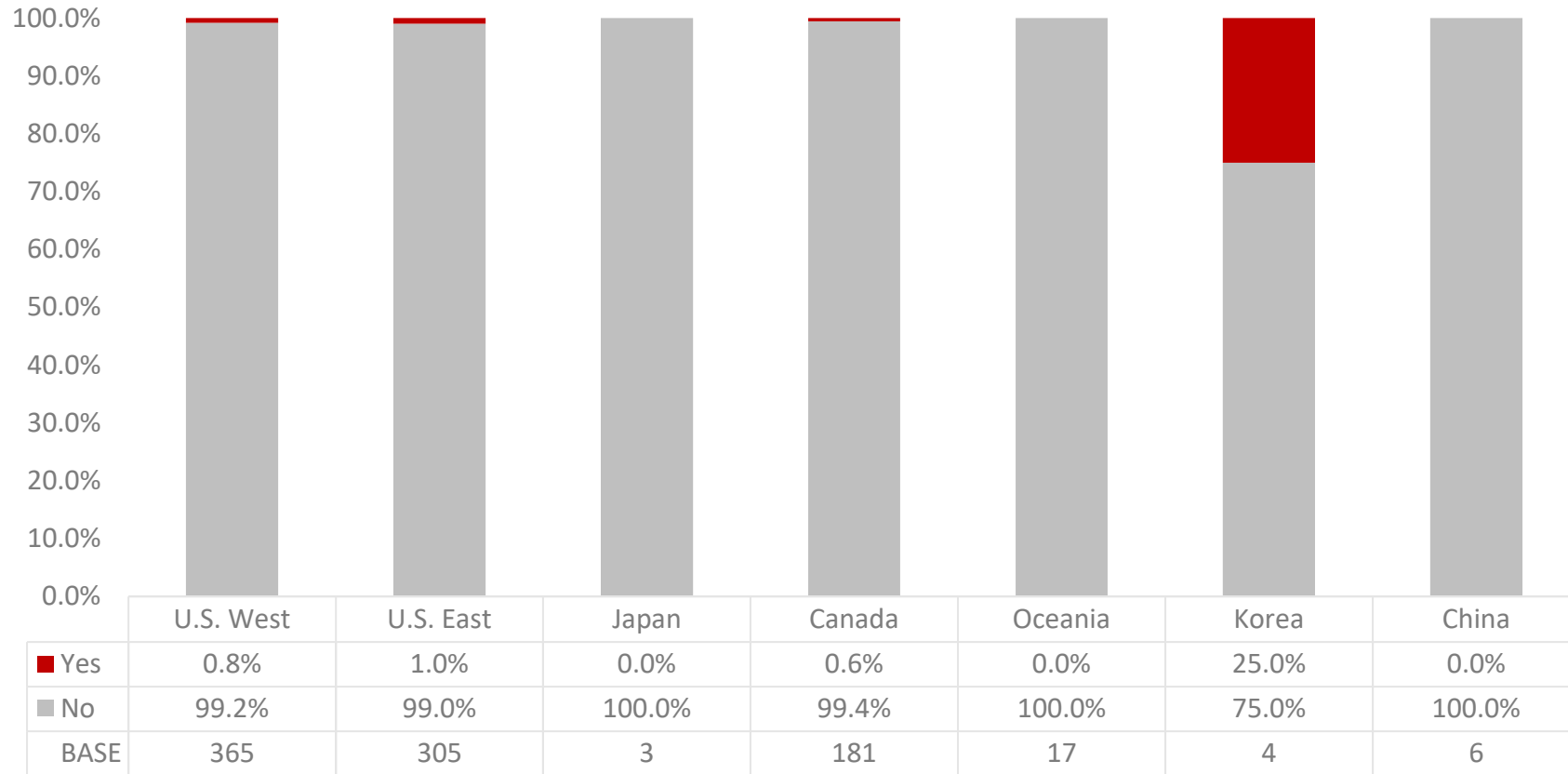


# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



■ Yes, technical issues but able to book reservation	7.7%	2.2%		5.4%	0.0%		
■ Yes, unable to make reservation	3.6%	6.5%		0.0%	0.0%		
■ No, I was able to book a reservation without issue	88.7%	91.3%		94.6%	100.0%		
BASE	27	46	0	19	1	0	0

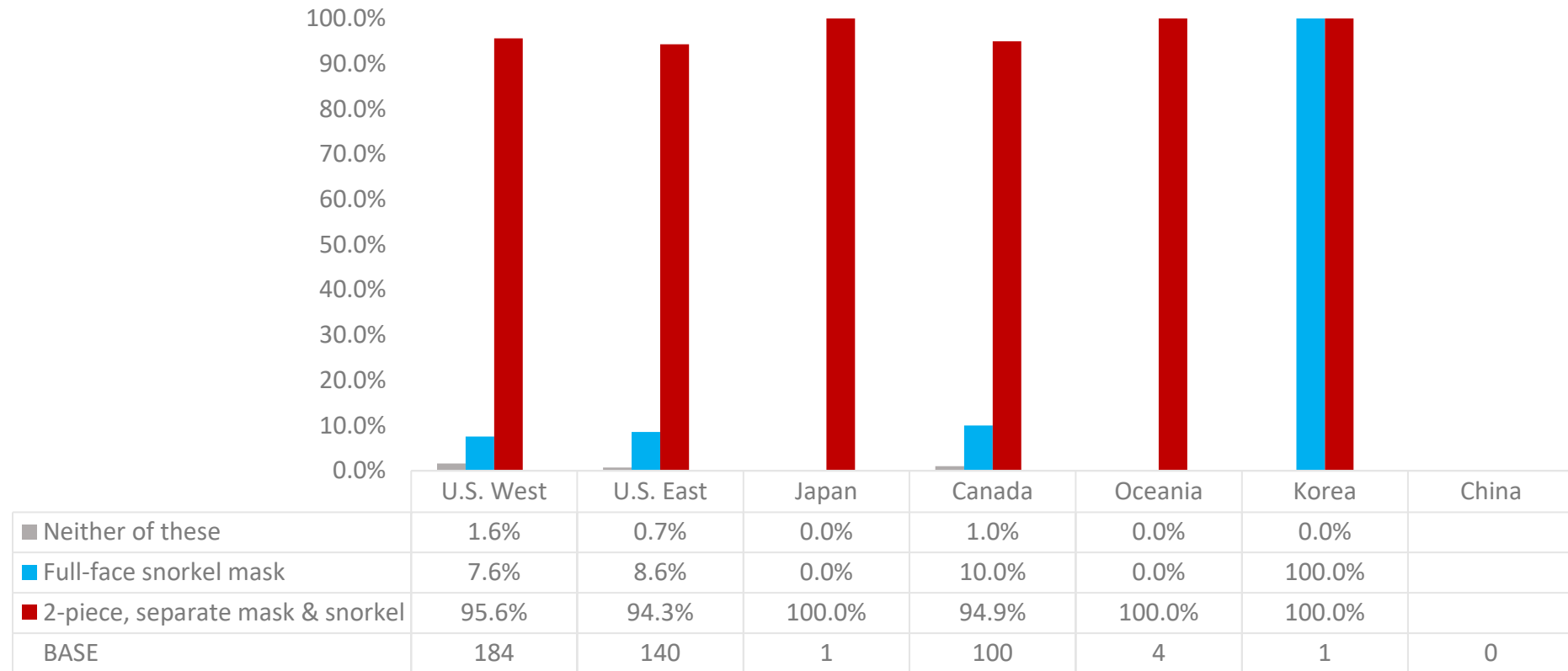
# VISITED MAUI FOR SPECIFIC EVENT



# VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Other sporting event	33.3%	33.3%	-	100.0%	-	0.0%	-
Other Festival/concert	33.3%	0.0%	-	0.0%	-	0.0%	-
Other (please specify festival/event name)	33.3%	0.0%	-	0.0%	-	0.0%	-
Wedding/Honeymoon/Anniversary/Birthday/Funeral/Graduation	0.0%	33.3%	-	0.0%	-	0.0%	-
Sentry Tournament of Golf Champions	0.0%	33.3%	-	0.0%	-	0.0%	-
American Windsurfing Tour	0.0%	0.0%	-	0.0%	-	100.0%	-
BASE	3	3	0	1	0	1	0

# SNORKELING EQUIPMENT USED - MAUI





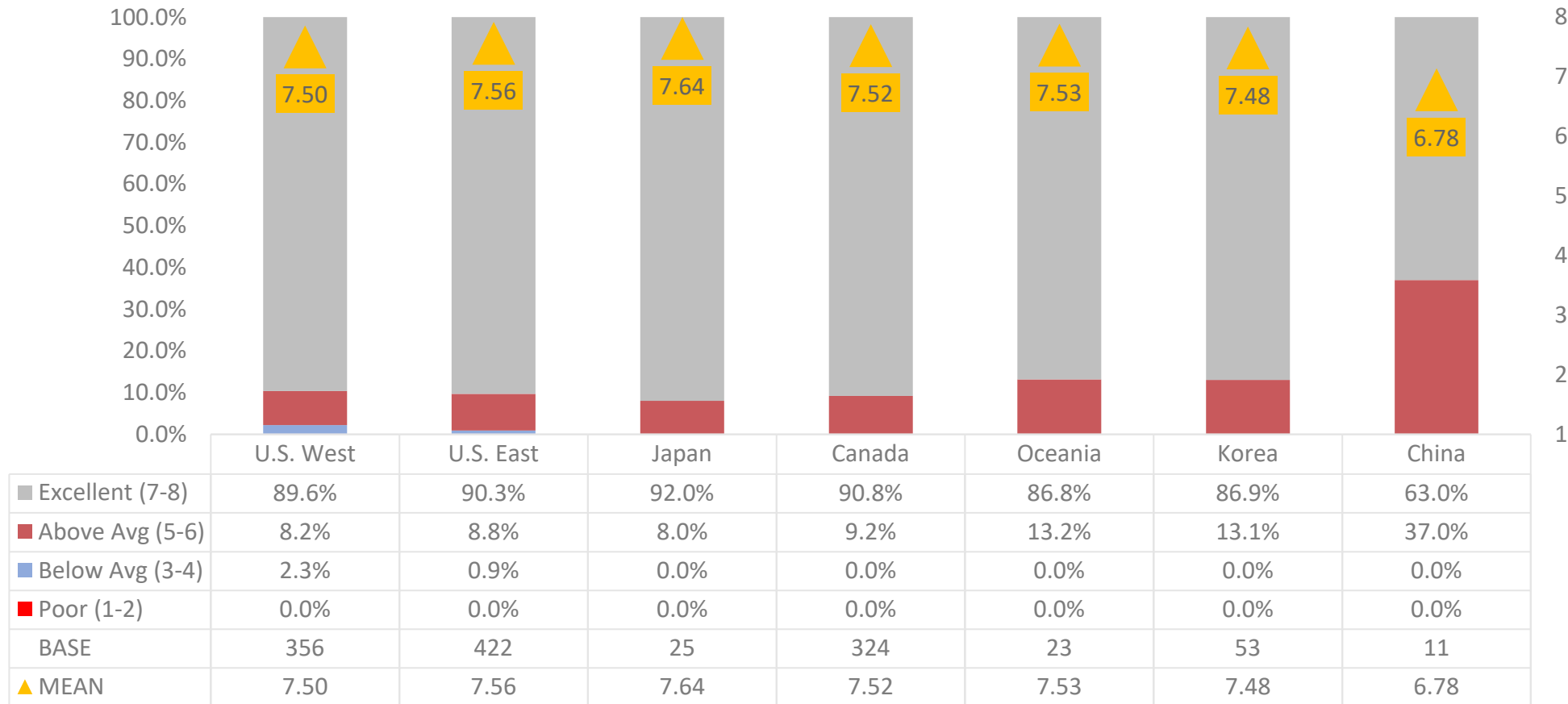
# SNORKELING OCEAN SAFETY - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Did not have to be assisted or rescued	98.4%	99.3%	100.0%	98.0%	100.0%	100.0%	-
Yes, needed assistance – using 2-piece mask & snorkel	1.6%	0.7%	0.0%	2.0%	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%	-
<b>BASE</b>	181	139	1	99	4	1	0

# Section 8 – Island of Hawai‘i

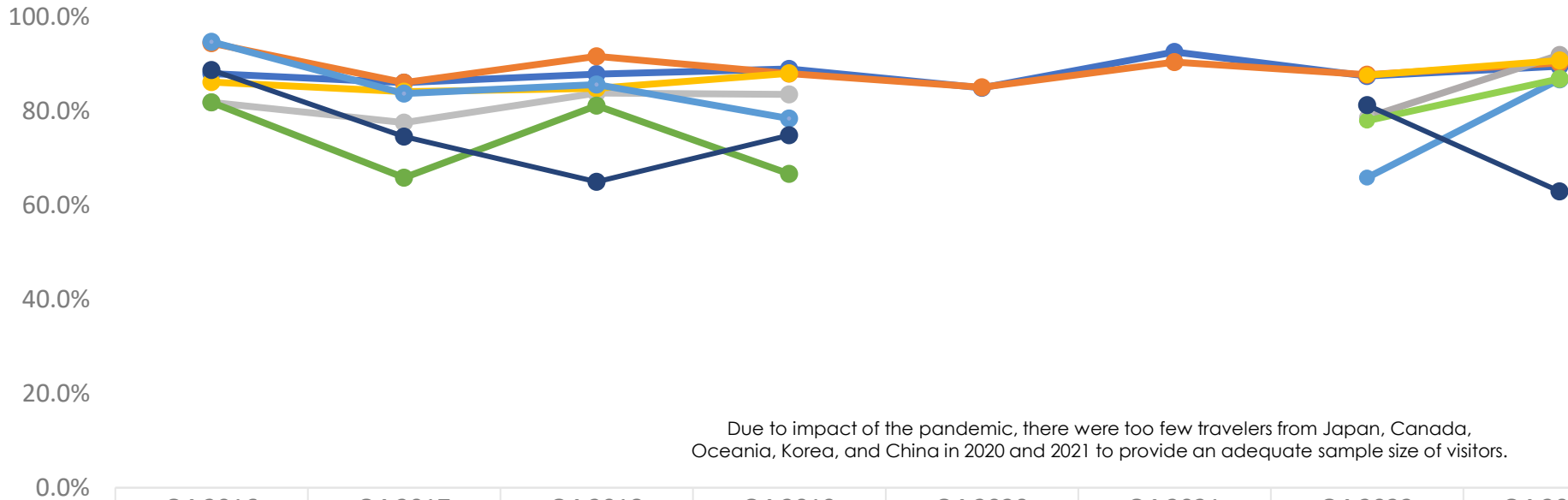
# SATISFACTION - ISLAND OF HAWAI'I

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



# SATISFACTION - ISLAND OF HAWAI‘I

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

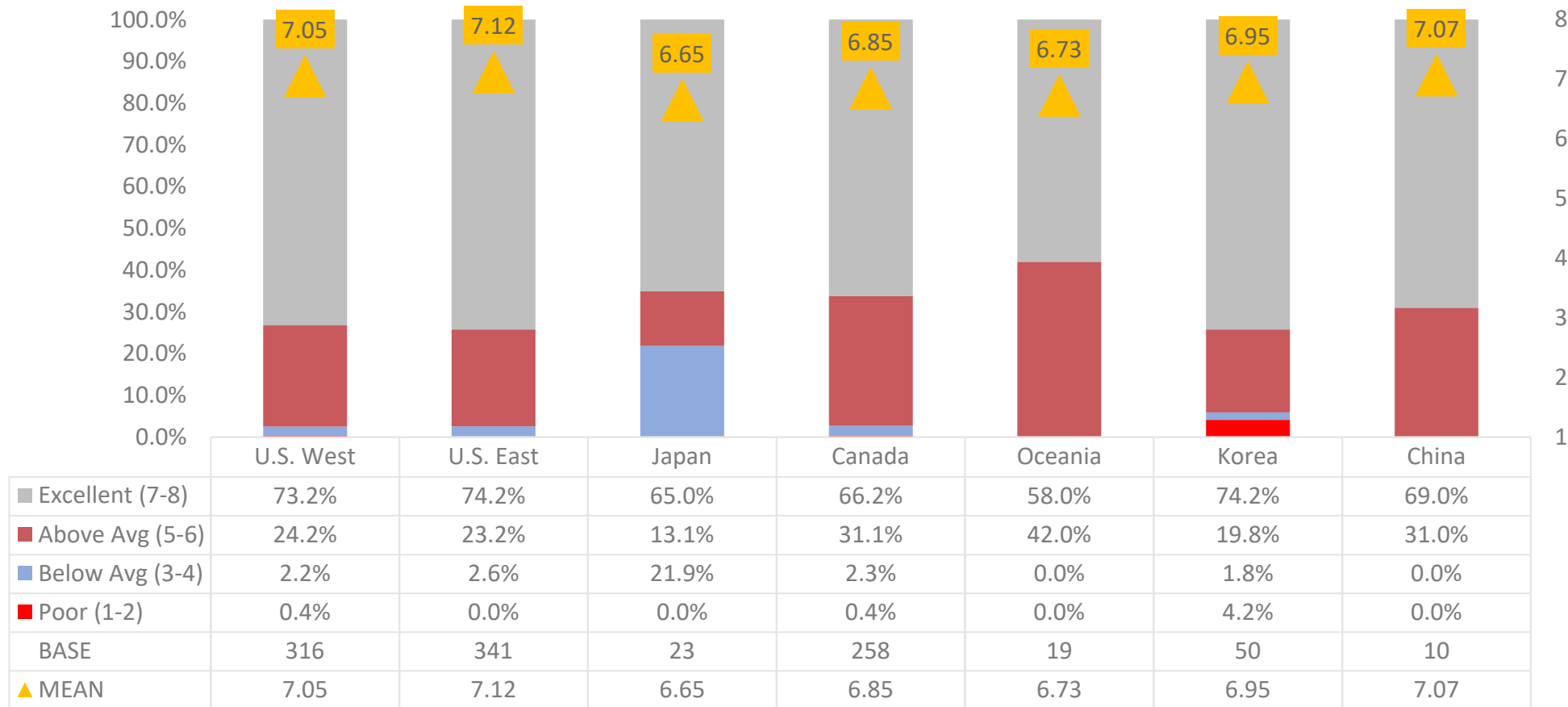


	Q4 2016	Q4 2017	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	88.0%	86.1%	87.9%	89.0%	85.0%	92.6%	87.5%	89.6%
U.S. East	94.5%	86.1%	91.7%	88.0%	85.1%	90.5%	87.8%	90.3%
Japan	81.9%	77.6%	83.9%	83.6%			78.7%	92.0%
Canada	86.2%	84.2%	84.9%	88.1%			87.7%	90.8%
Oceania	94.8%	83.8%	85.7%	78.5%			65.9%	86.8%
Korea	81.9%	65.9%	81.2%	66.7%			78.0%	86.9%
China	88.8%	74.6%	65.0%	74.9%			81.3%	63.0%

P= Preliminary Data

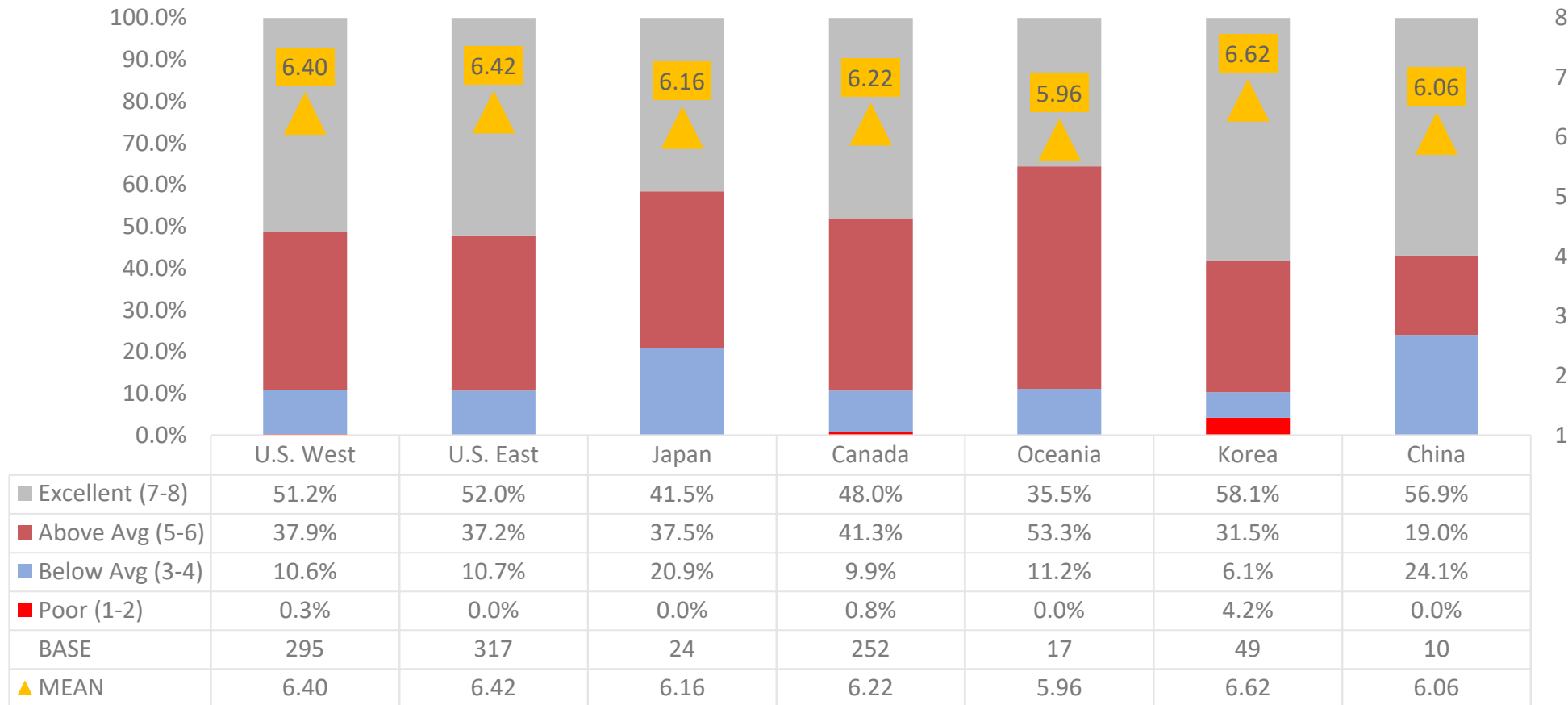
# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



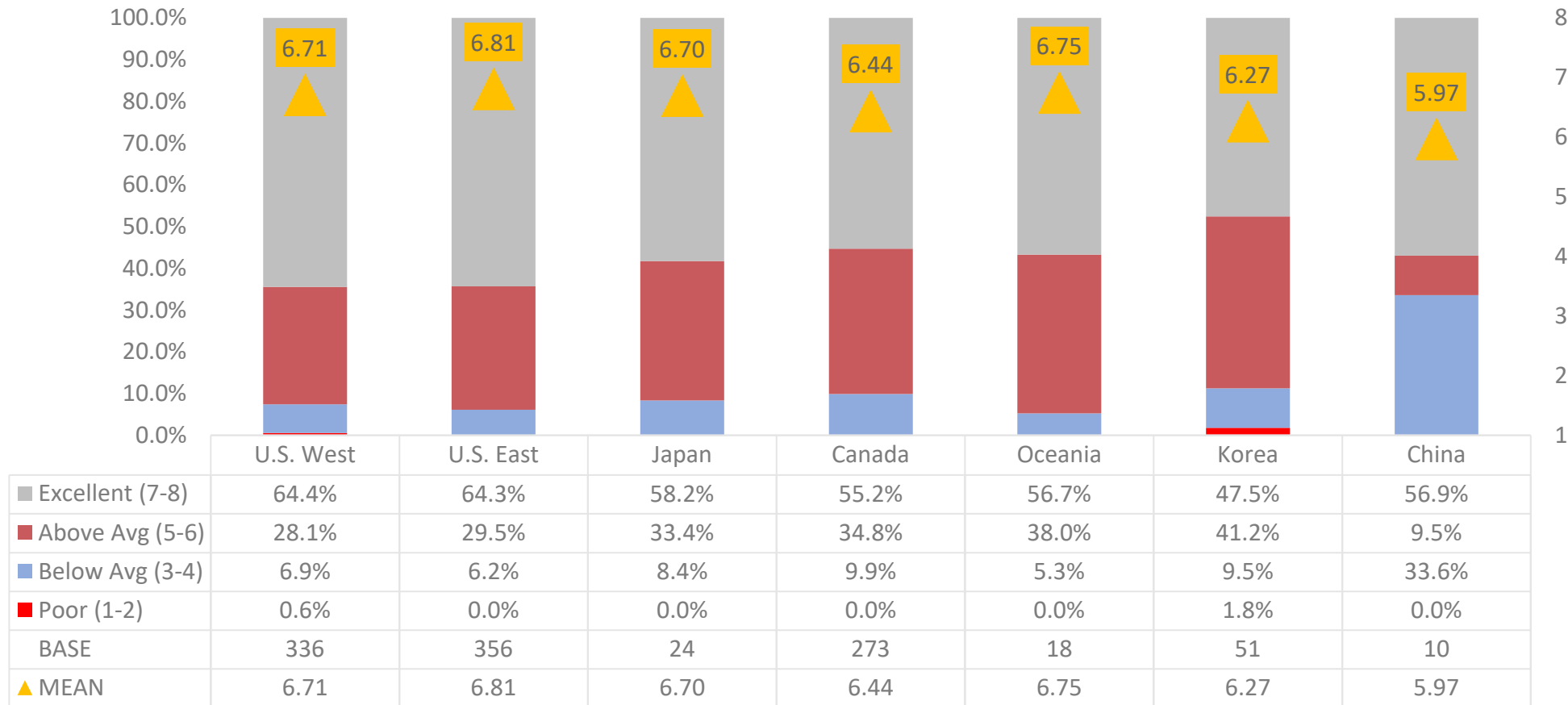
# SHOPPING - ISLAND OF HAWAI‘I

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



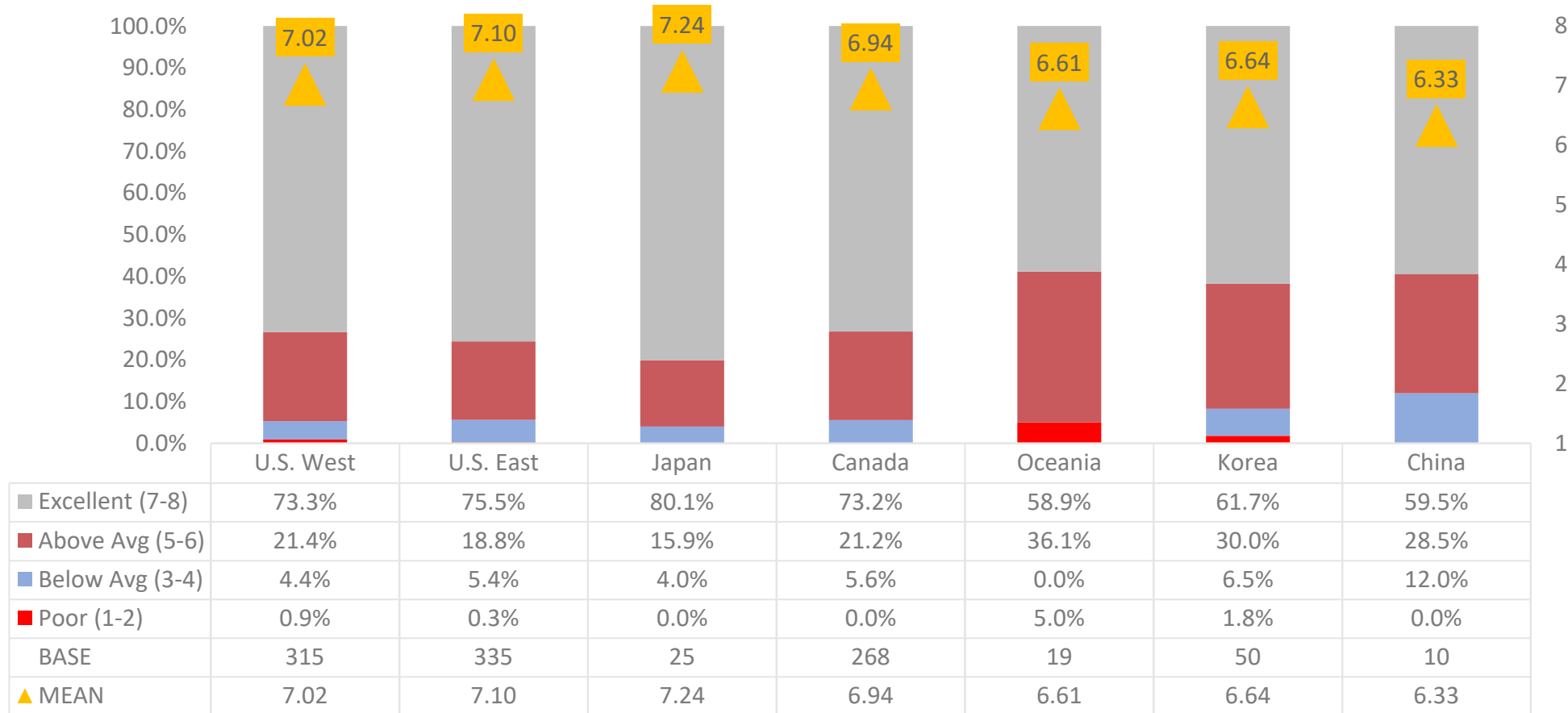
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

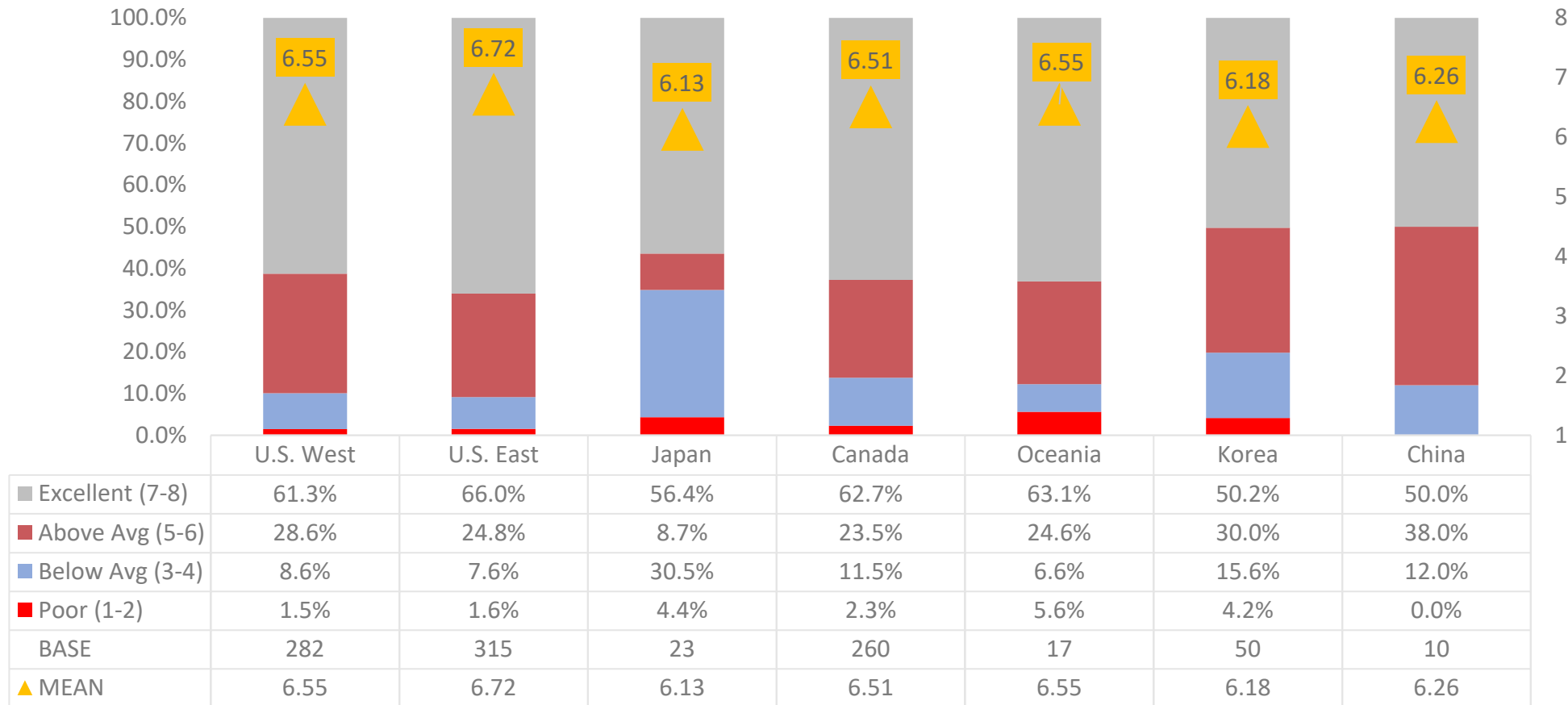
8-pt Rating Scale  
8 = Excellent / 1 = Poor





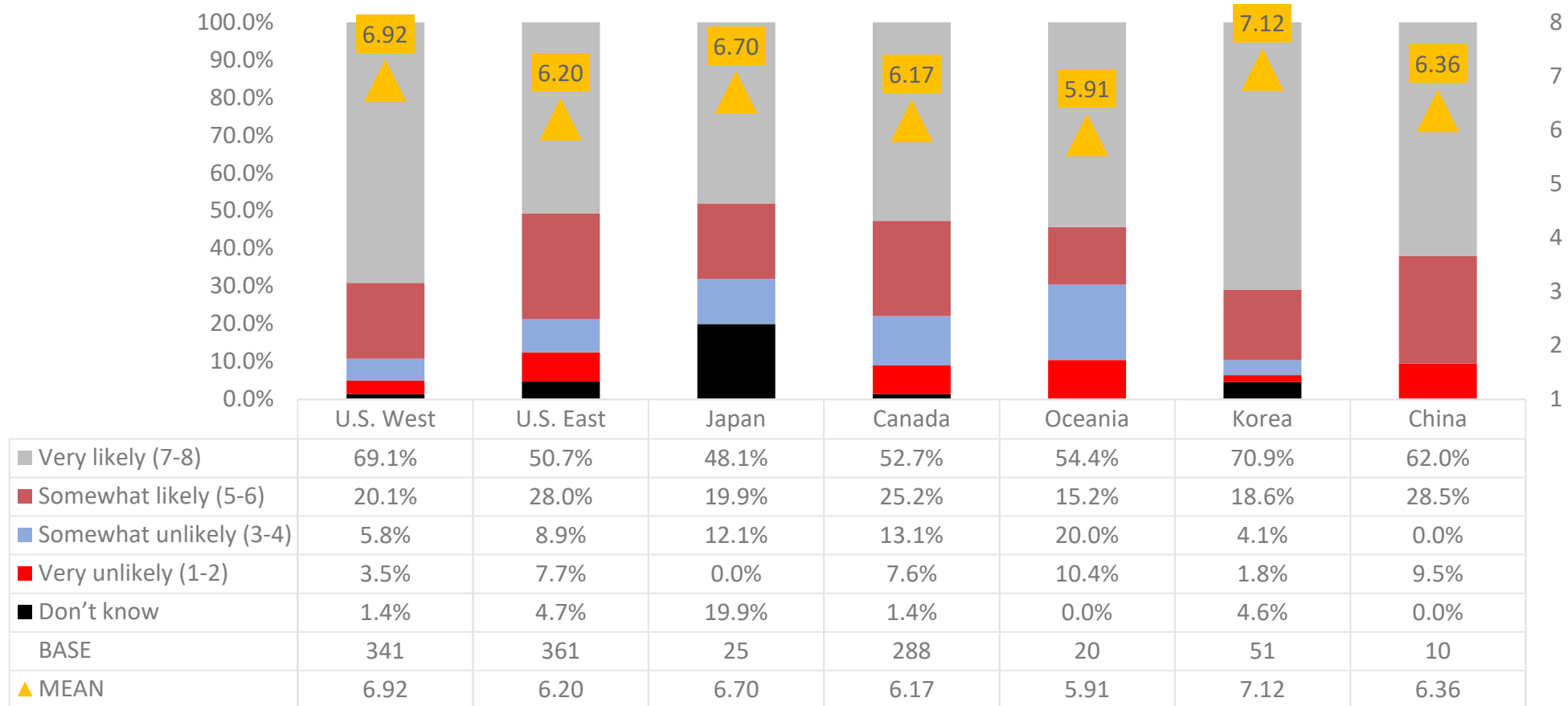
# TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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)

100.0%

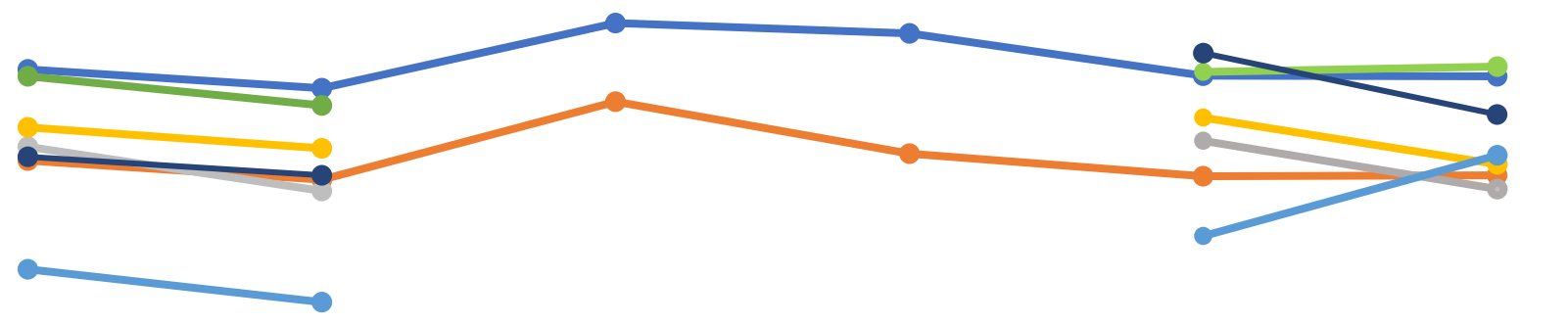
80.0%

60.0%

40.0%

20.0%

0.0%

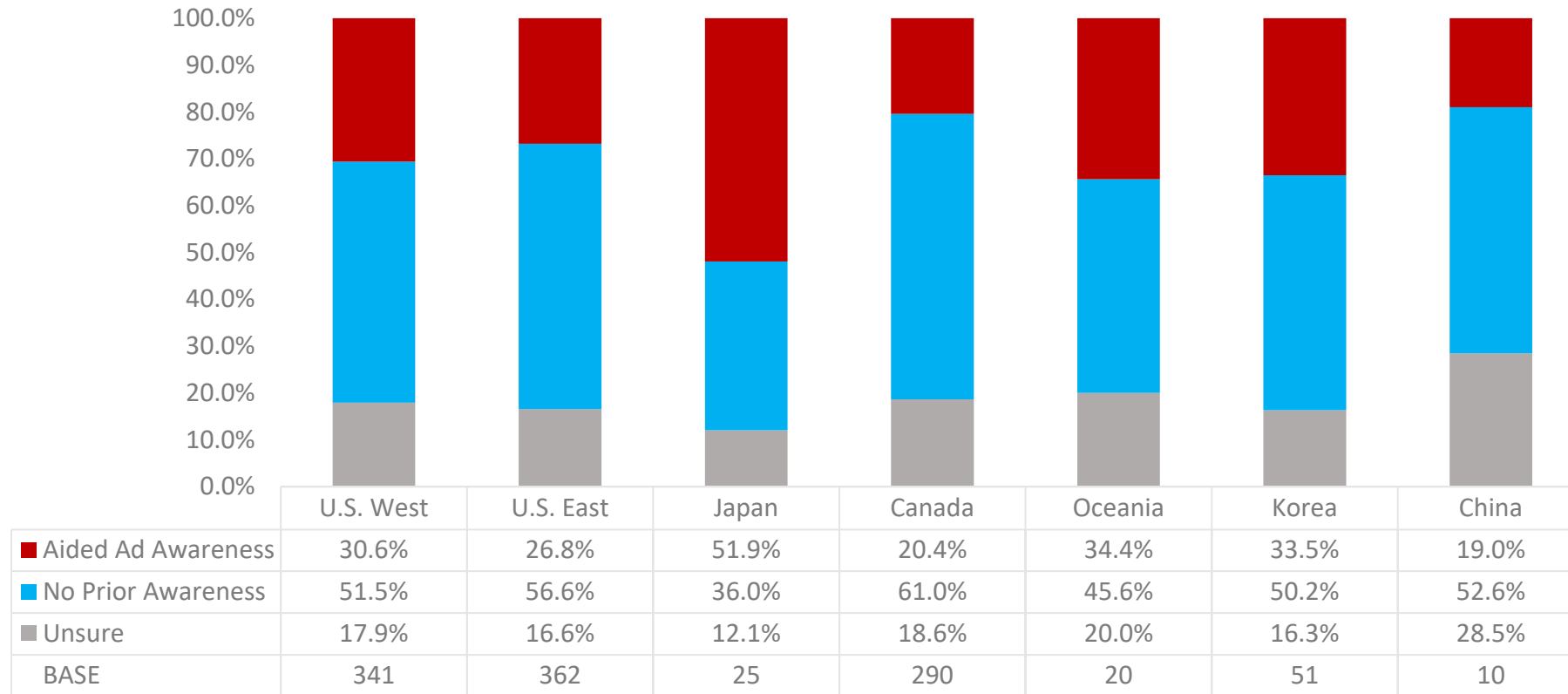


Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors.

	Q4 2018	Q4 2019	Q4 2020	Q4 2021	Q4 2022	Q4 2023 P
U.S. West	70.4%	66.9%	79.0%	77.1%	69.2%	69.1%
U.S. East	53.4%	49.9%	64.4%	54.7%	50.5%	50.7%
Japan	56.0%	47.8%			57.1%	48.1%
Canada	59.6%	55.7%			61.4%	52.7%
Oceania	33.2%	27.1%			39.4%	54.4%
Korea	69.1%	63.7%			69.9%	70.9%
China	54.1%	50.7%			73.4%	62.0%

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	China
<b>Famous landmarks or imagery/ natural beauty</b>	46.9%	49.7%	55.9%	39.8%	55.2%	57.9%	69.0%
<b>Outdoor or sporting activities and events</b>	24.3%	17.9%	8.0%	23.8%	24.8%	16.3%	19.0%
<b>Hawaiian cultural events</b>	11.7%	10.8%	24.1%	7.9%	10.4%	2.3%	9.5%
<b>Social media posts and videos</b>	8.4%	6.9%	8.0%	7.9%	10.4%	11.3%	28.5%
<b>Television programs or movies filmed in Hawai'i</b>	5.8%	8.0%	24.0%	7.8%	5.6%	12.2%	19.0%
<b>Hawaiian music</b>	9.4%	5.0%	4.0%	5.2%	4.8%	1.8%	0.0%
<b>BASE</b>	341	362	25	290	20	51	10%

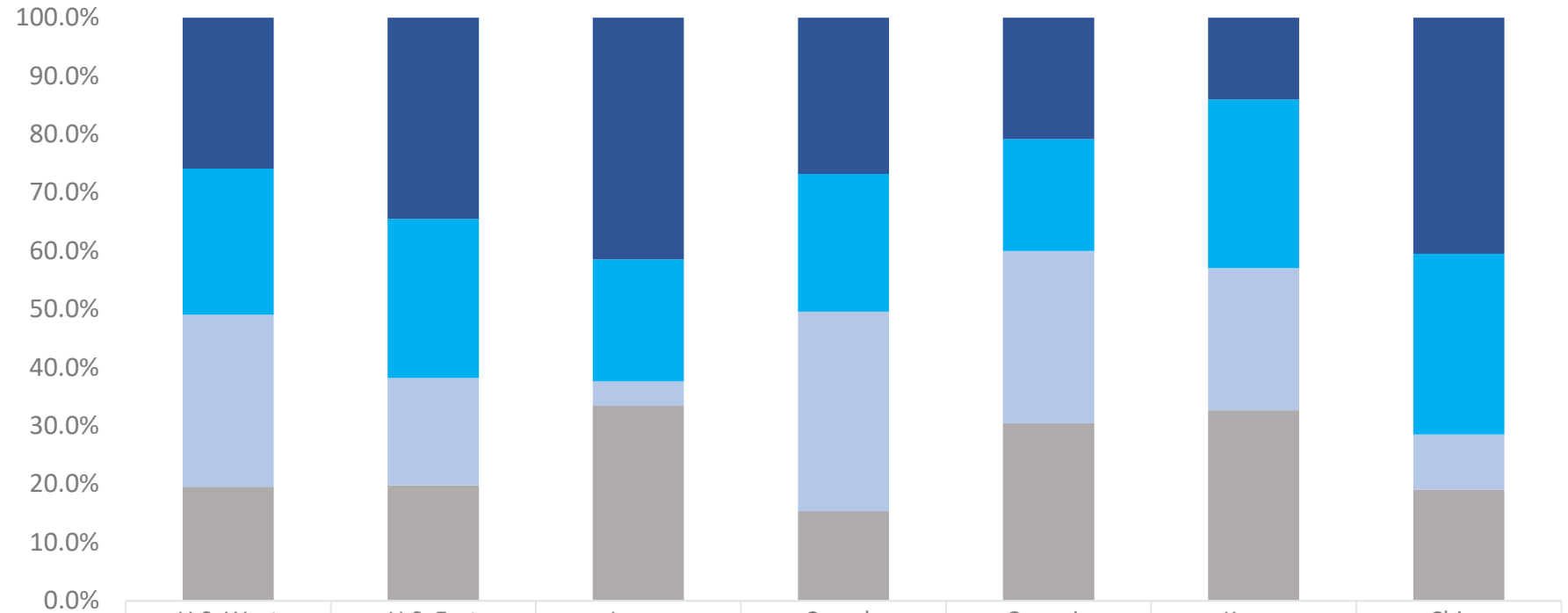
# ATTRACTIONS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>'Akaka Falls</b>	24.2%	30.0%	16.1%	24.6%	30.4%	24.0%	19.0%
<b>Botanical Gardens</b>	16.5%	20.5%	0.0%	17.4%	36.1%	9.5%	19.0%
<b>H.N. Greenwell Store</b>	5.0%	4.4%	3.9%	5.2%	4.8%	0.0%	0.0%
<b>Hawai'i Volcanoes National Park</b>	47.6%	64.4%	43.9%	57.1%	49.6%	63.9%	90.5%
<b>Hilo Farmers Market</b>	26.6%	23.3%	36.2%	24.5%	20.0%	14.5%	40.5%
<b>Hulihe'e Palace</b>	3.5%	6.1%	3.9%	3.1%	16.1%	0.0%	0.0%
<b>'Imiloa Astronomy Ctr</b>	1.4%	1.9%	4.0%	2.4%	0.0%	2.3%	9.5%
<b>Kaloko-Honokōhau National Historical Park</b>	10.8%	12.8%	0.0%	11.1%	0.0%	4.1%	28.5%
<b>Kona Coffee Living History Farm</b>	12.0%	16.6%	24.1%	13.2%	15.2%	39.0%	0.0%
<b>Lili'uokalani Park and Garden</b>	10.1%	12.5%	4.0%	9.3%	10.4%	5.9%	0.0%

# ATTRACTIONS - ISLAND OF HAWAI'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Lyman House Memorial Museum</b>	0.9%	0.8%	0.0%	1.4%	0.0%	0.0%	0.0%
<b>Maunakea Visitor Ctr/ Summit</b>	15.1%	20.3%	31.8%	19.0%	24.8%	53.4%	31.0%
<b>Orchid Farm</b>	1.5%	1.9%	0.0%	1.4%	5.6%	1.8%	0.0%
<b>Pacific Tsunami Museum</b>	4.9%	1.4%	3.9%	2.1%	4.8%	2.3%	0.0%
<b>Pana'ewa Rainforest Zoo &amp; Garden</b>	6.2%	2.2%	3.9%	3.8%	0.0%	2.3%	0.0%
<b>Pu'uhonua o Hōnaunau National Historical Park</b>	22.0%	20.8%	4.0%	23.2%	10.4%	5.9%	19.0%
<b>Pu'ukoholā Heiau National Historical Site</b>	11.7%	12.5%	0.0%	10.4%	9.6%	1.8%	19.0%
<b>Punalu'u Black Sand Beach</b>	30.9%	37.5%	15.9%	36.8%	25.6%	31.3%	31.0%
<b>Rainbow Falls</b>	24.8%	36.6%	16.0%	22.4%	35.2%	24.5%	21.5%
<b>Volcano Art Center</b>	9.3%	11.1%	8.0%	6.9%	9.6%	21.4%	9.5%

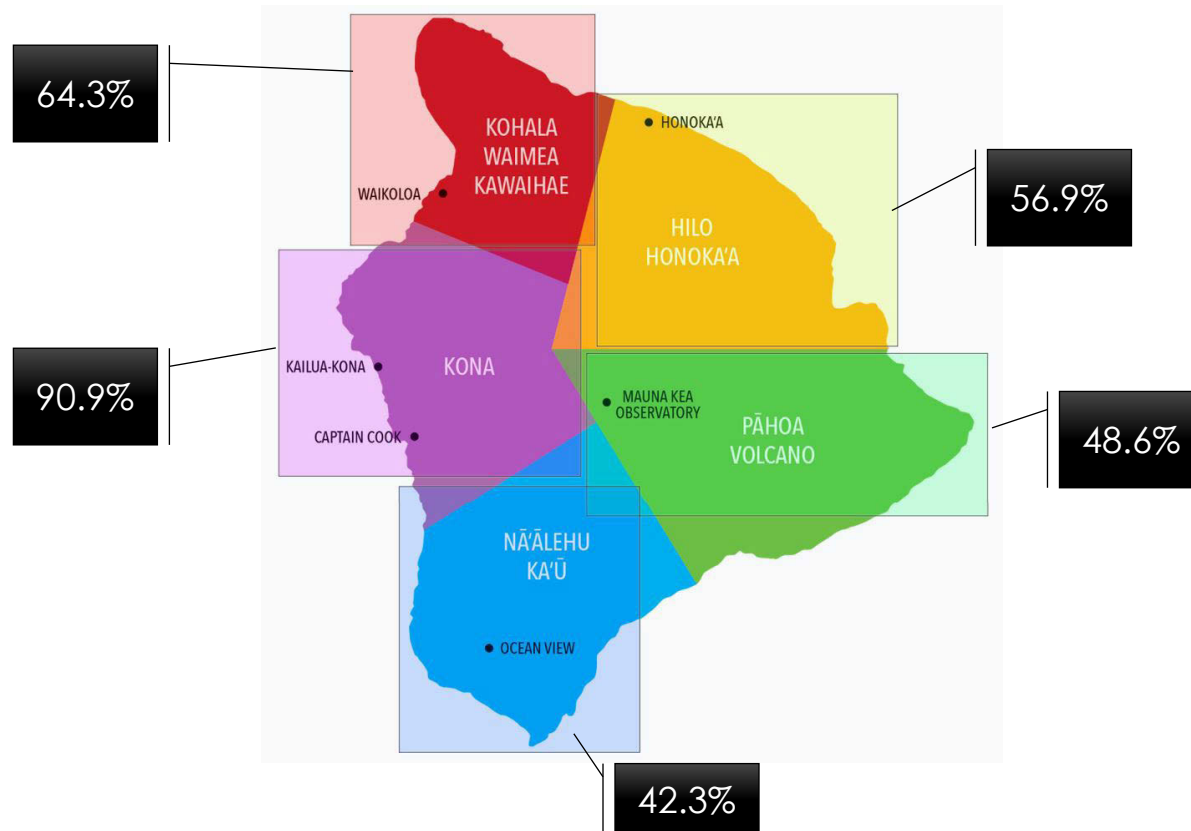
# TRAVEL ON ISLAND OF HAWAI'I



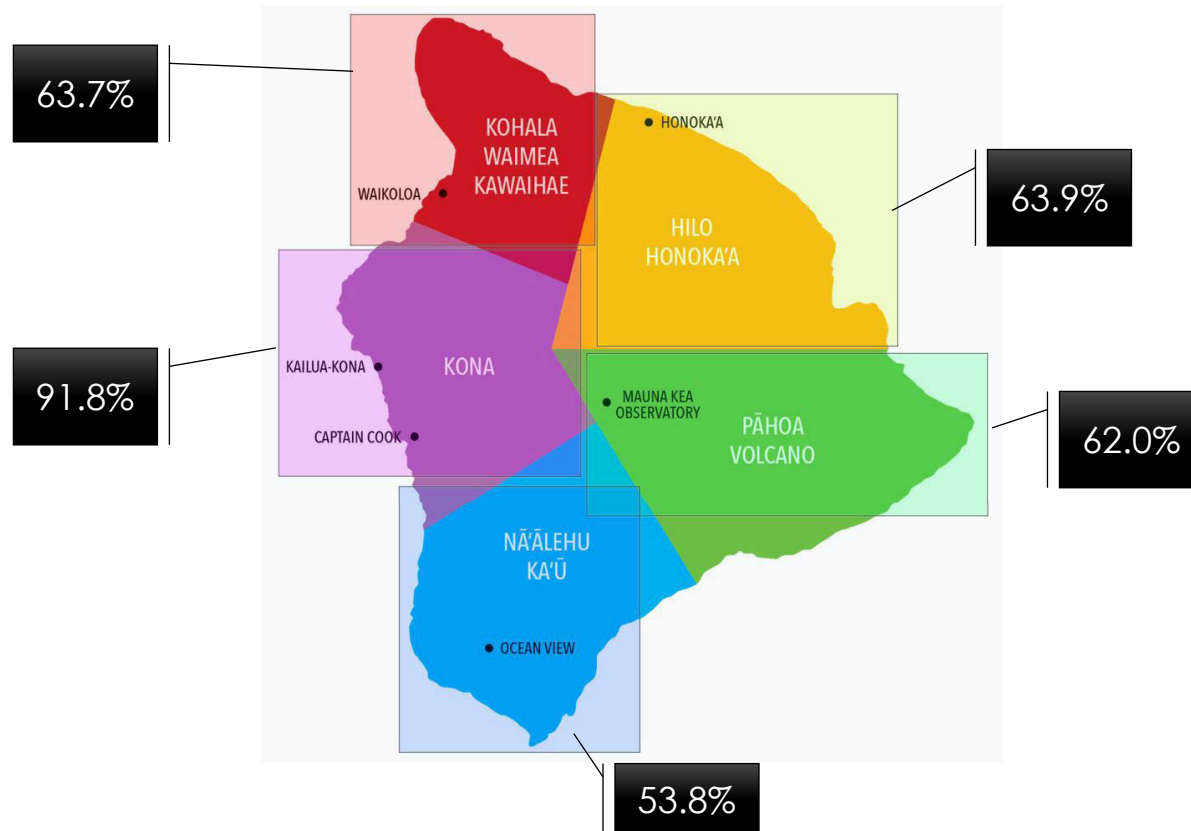
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
Traveled to other side of island	25.9%	34.5%	41.5%	26.8%	20.8%	14.0%	40.5%
Traveled more than 1 hour one way to reach activities	25.1%	27.3%	20.9%	23.6%	19.2%	28.9%	31.0%
Traveled 1 hour or less one way to reach activity	29.5%	18.4%	4.2%	34.2%	29.6%	24.4%	9.5%
Enjoy activities- short drive from accommodations	19.6%	19.8%	33.4%	15.4%	30.4%	32.7%	19.0%
BASE	341	359	24	287	20	51	10



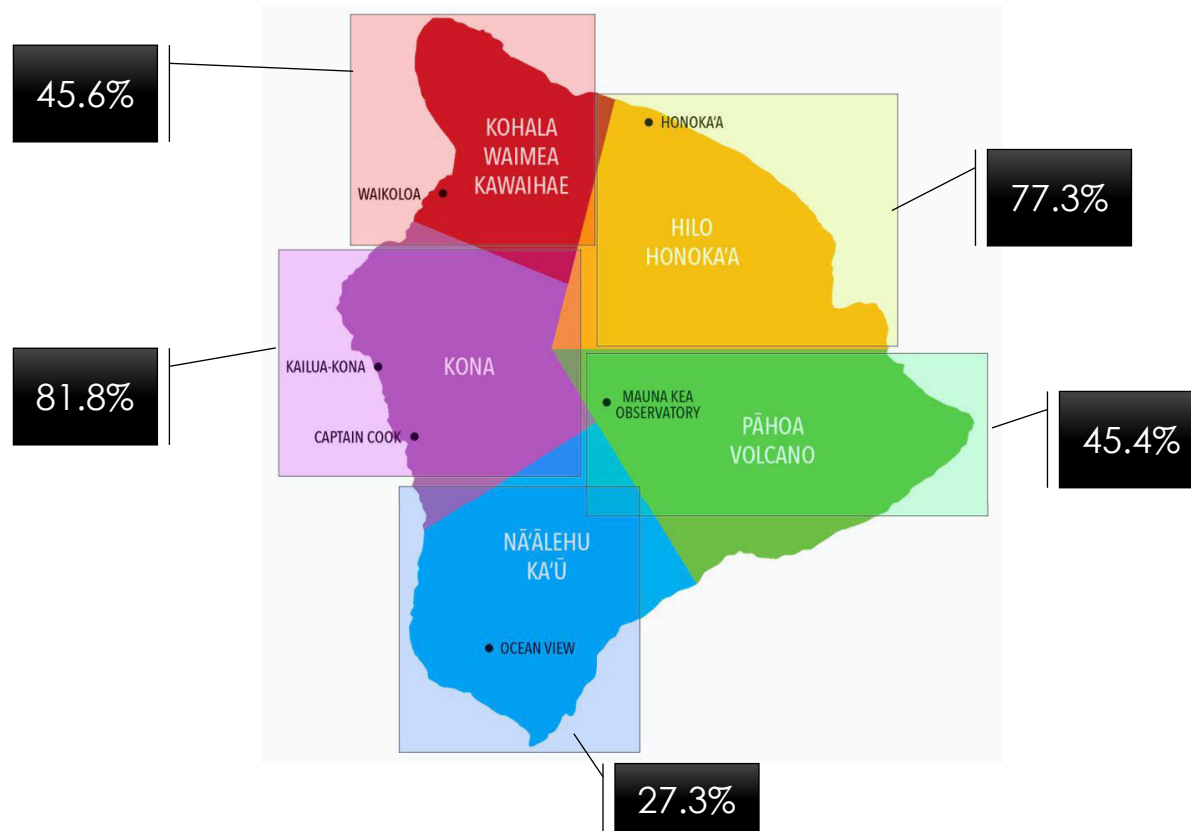
# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



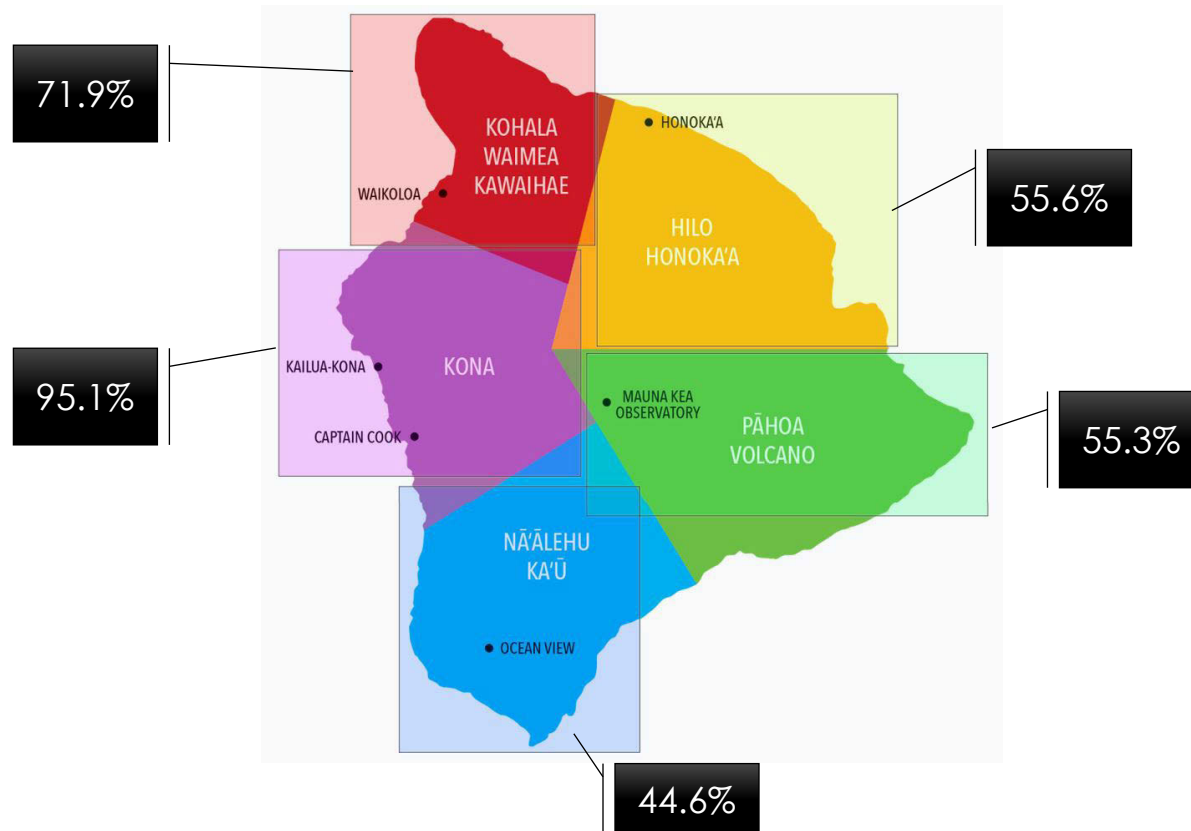
# AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



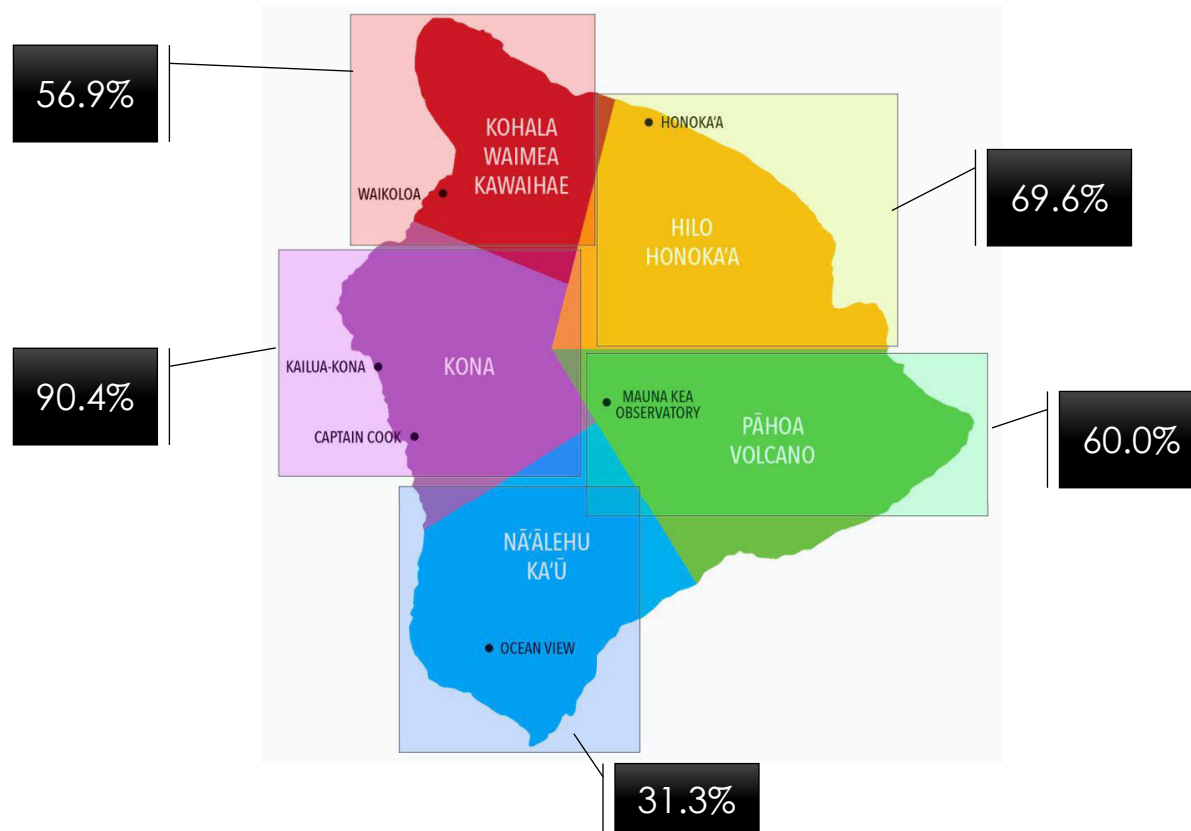
# AREAS VISITED ISLAND OF HAWAI'I JAPAN



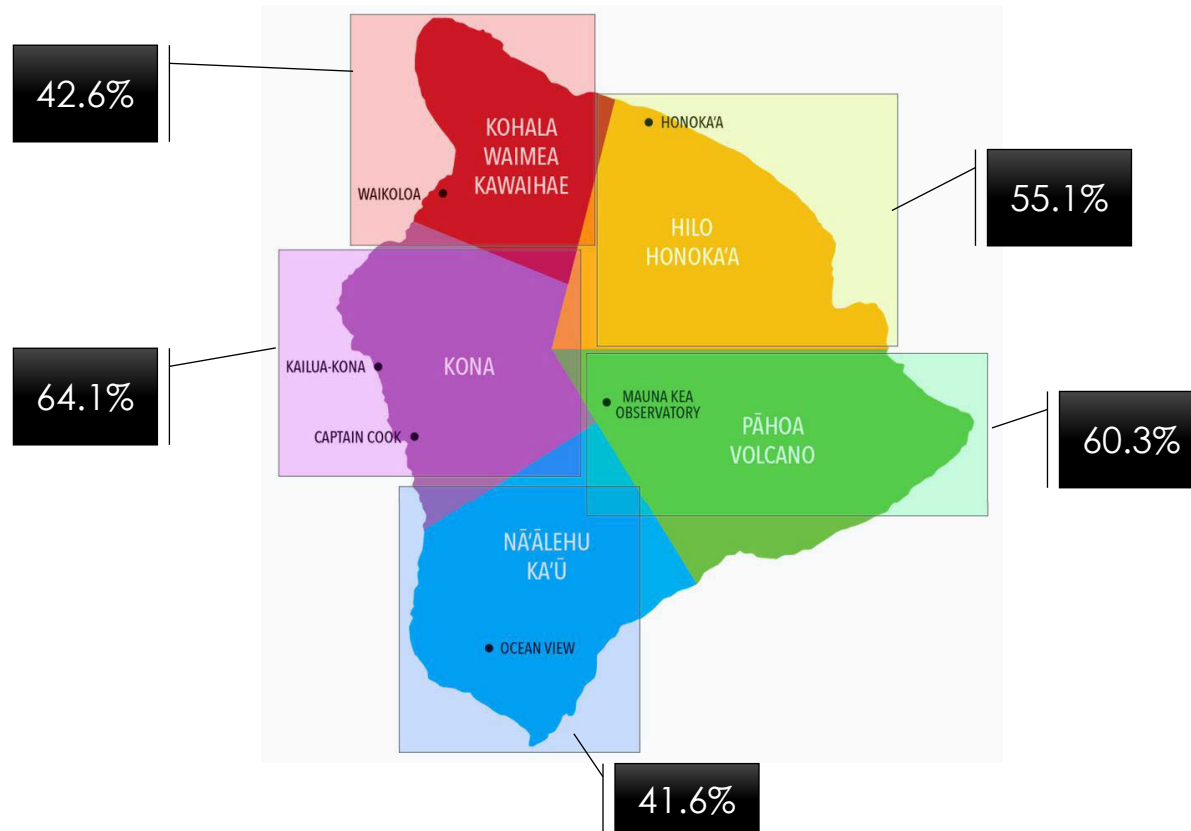
# AREAS VISITED ISLAND OF HAWAI'I CANADA



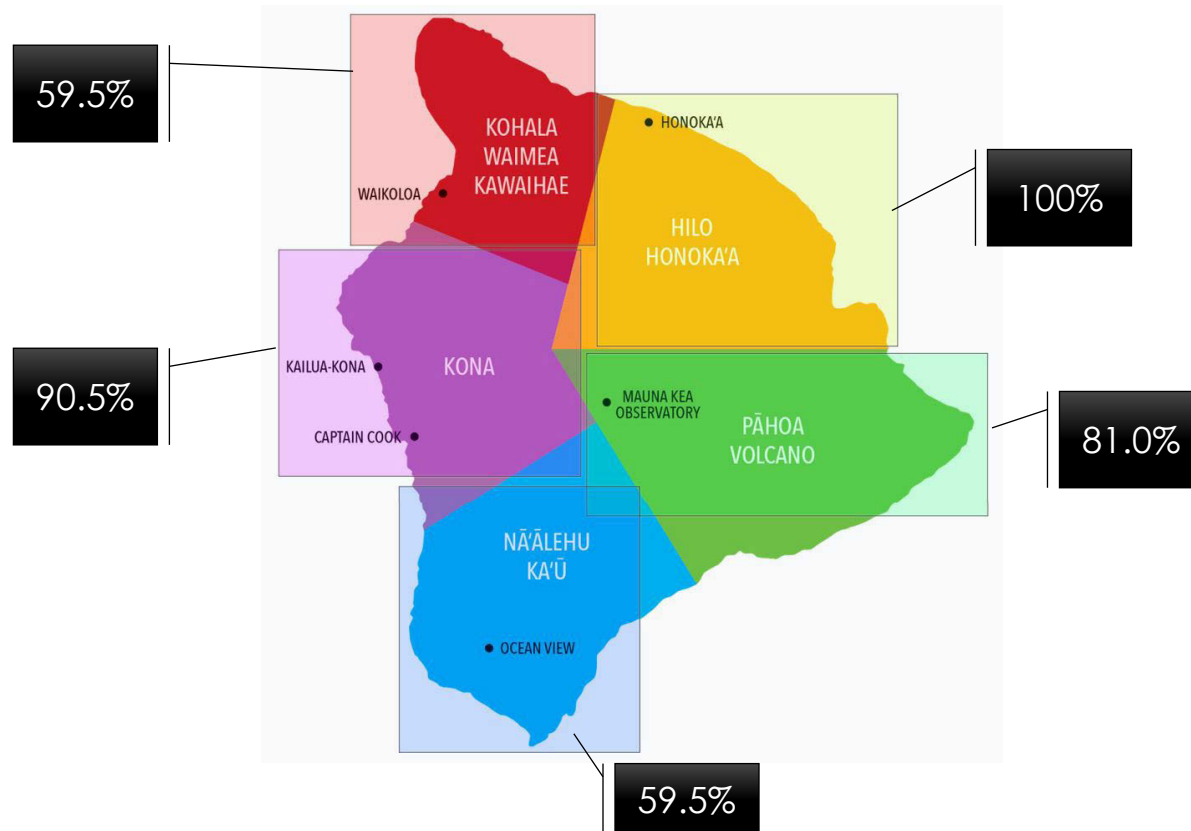
# AREAS VISITED ISLAND OF HAWAI'I OCEANIA



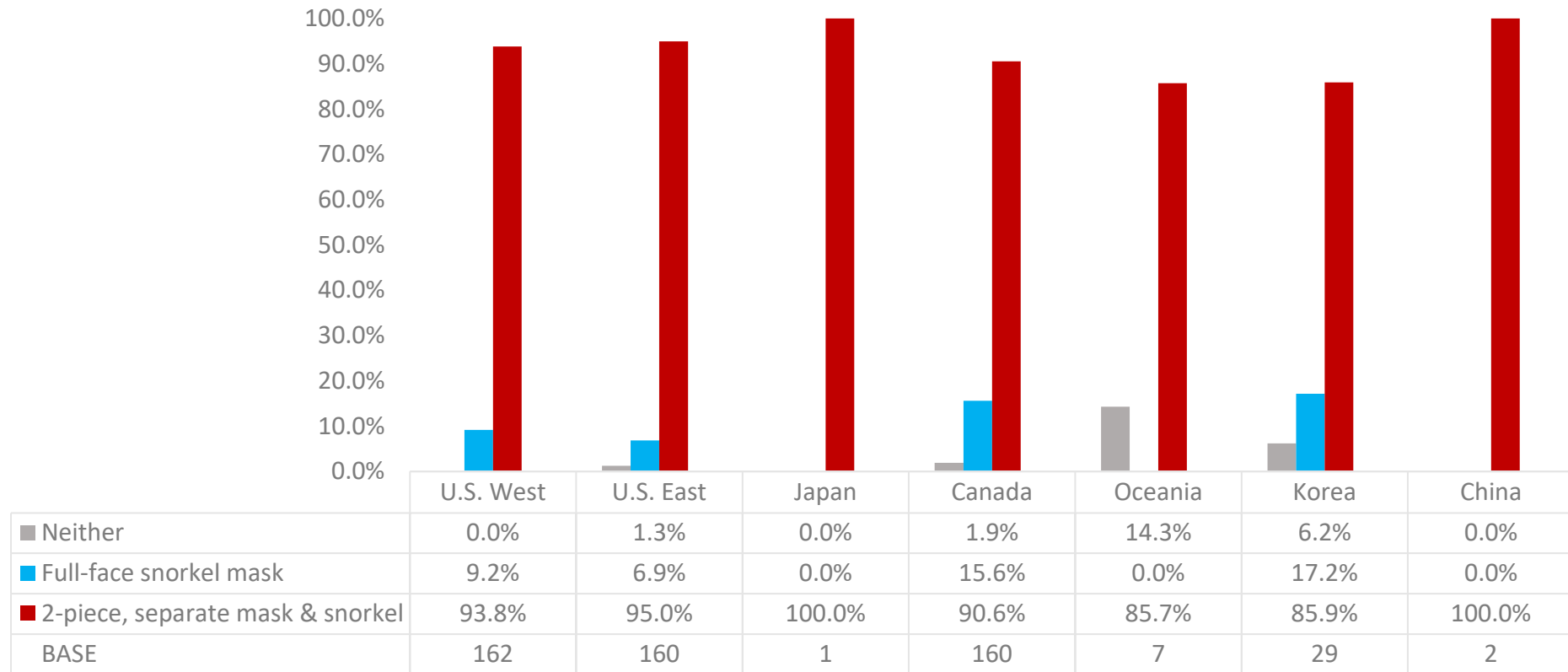
# AREAS VISITED ISLAND OF HAWAI'I KOREA



# AREAS VISITED ISLAND OF HAWAI'I CHINA



# SNORKELING EQUIPMENT USED - ISLAND OF HAWAI'I



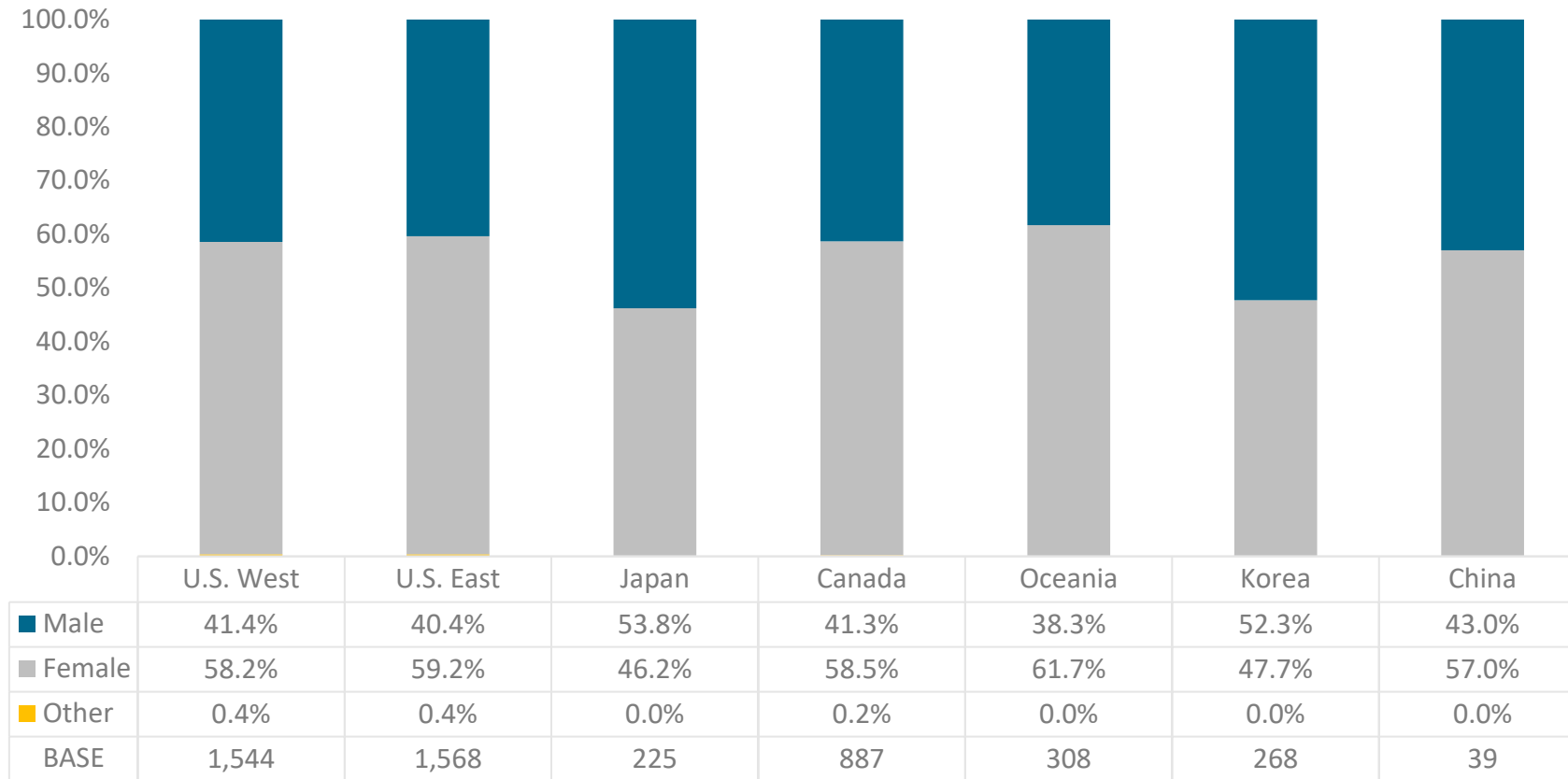


# SNORKELING OCEAN SAFETY - ISLAND OF HAWAI‘I

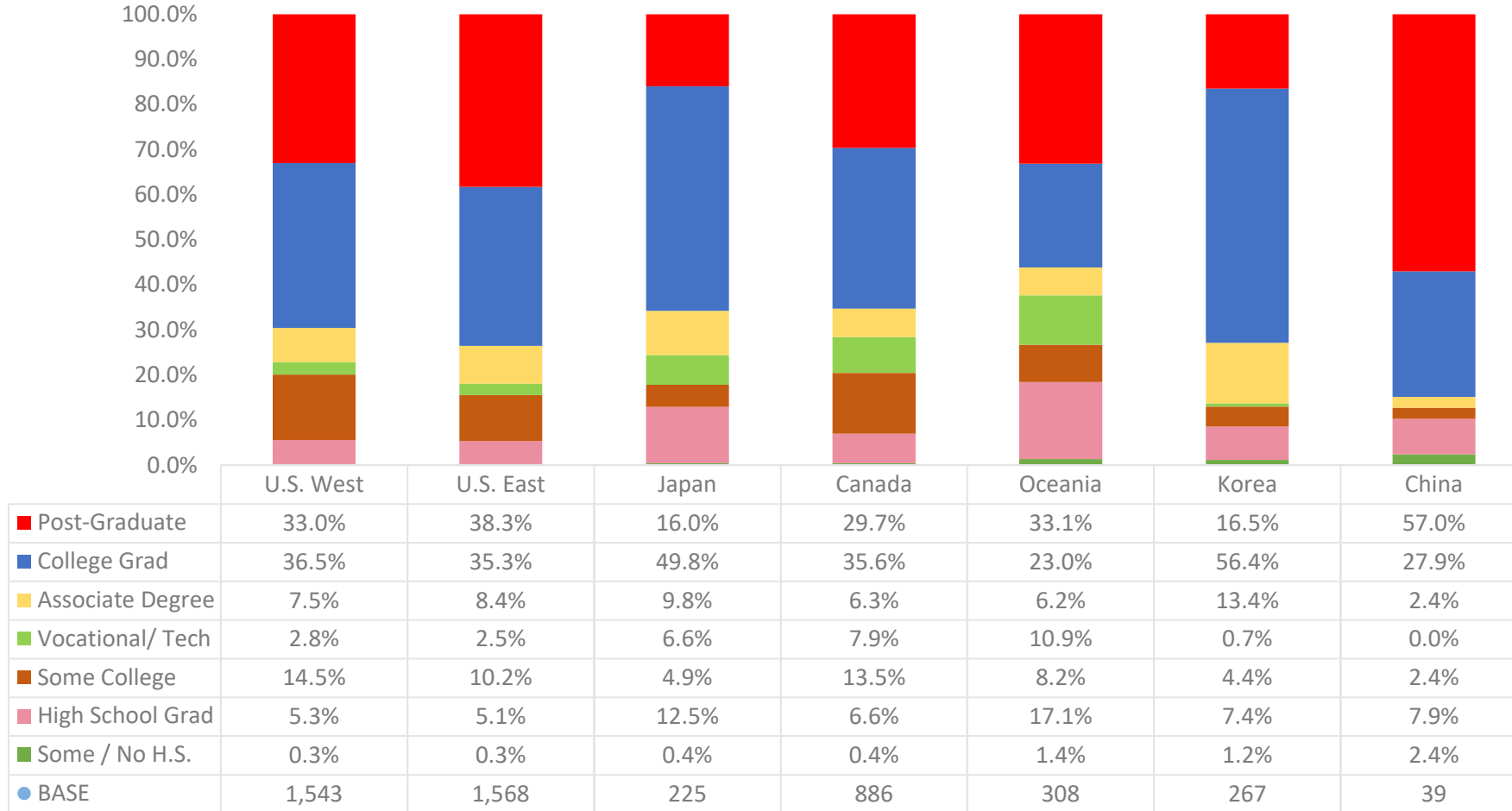
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China
<b>Did not have to be assisted or rescued</b>	98.2%	98.1%	100.0%	98.7%	100.0%	100.0%	100.0%
<b>Yes, needed assistance – using 2-piece mask &amp; snorkel</b>	1.8%	1.9%	0.0%	1.3%	0.0%	0.0%	0.0%
<b>Yes, while doing another type of ocean activity</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>BASE</b>	162	158	1	157	6	27	2

# 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	4.2%	5.2%	3.6%	5.9%
\$40,000 to \$59,999	4.5%	5.4%	6.5%	6.3%
\$60,000 to \$79,999	8.4%	8.7%	10.1%	11.2%
\$80,000 to \$99,999	8.3%	8.5%	11.5%	12.3%
\$100,000 to \$124,999	12.0%	13.8%	13.0%	10.9%
\$125,000 to \$149,999	11.6%	11.1%	11.3%	11.4%
\$150,000 to \$174,999	11.6%	10.6%	11.8%	10.1%
\$175,000 to \$199,999	6.8%	6.9%	8.7%	10.2%
\$200,000 to \$249,999	9.5%	8.7%	9.0%	9.4%
\$250,000 +	23.1%	21.2%	14.5%	12.2%

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	11.7%
¥3.5 - ¥4.5 million	12.1%
¥4.5 - ¥5.5 million	10.7%
¥5.5 - ¥6.5 million	7.0%
¥6.5 - ¥7.5 million	6.5%
¥7.5 - ¥8.5 million	7.9%
¥8.5 - ¥10.0 million	12.2%
¥10.0 - ¥15.0 million	15.9%
¥15.0 - ¥20.0 million	7.5%
¥20.0 million +	8.4%

# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

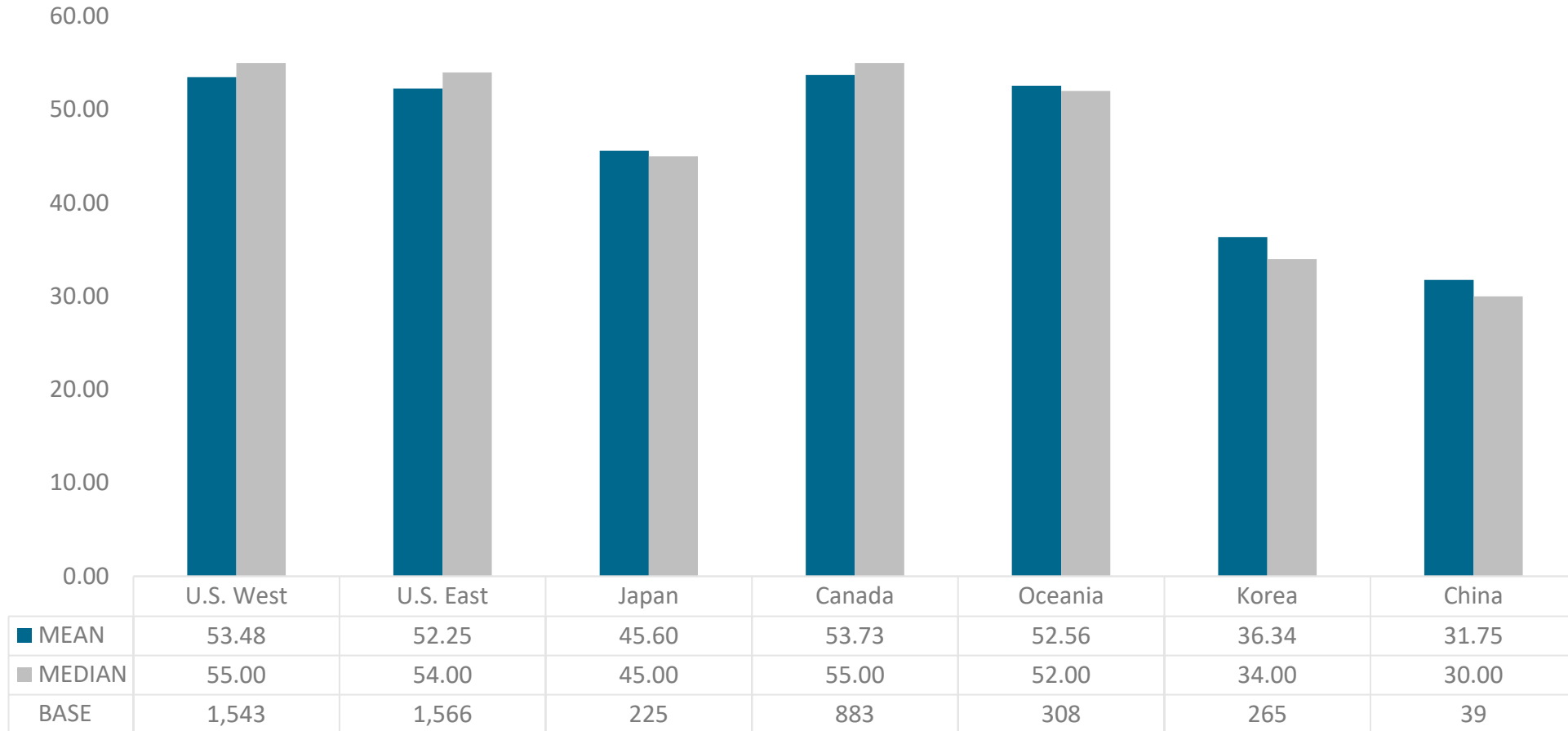
	Korean
< ₩16,305,000	8.5%
₩16,305,000-27,173,999	4.7%
₩27,174,000-38,041,999	11.6%
₩38,042,000-48,911,999	15.1%
₩48,912,000-59,781,999	10.3%
₩59,782,000-70,652,999	8.9%
₩70,653,000-81,520,999	9.4%
₩81,521,000-92,390,999	4.5%
₩92,391,000-103,259,999	7.0%
₩103,260,000-149,999,999	11.2%
₩150,000,000-199,999,999	3.9%
₩200,000,000+	4.7%

# VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

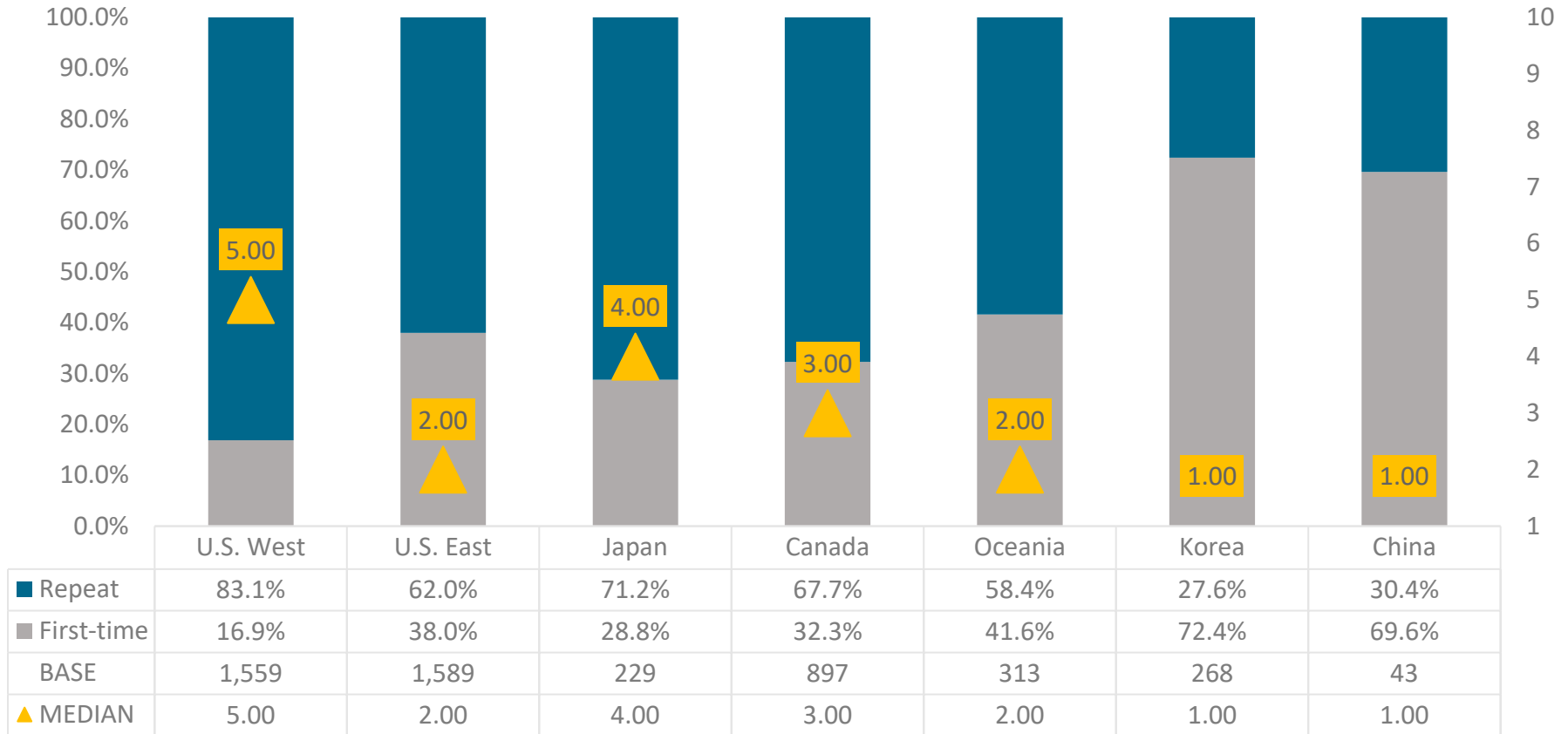
	China
<¥250,799	7.8%
¥250,800 – 376,099	22.2%
¥376,100 – 501,399	3.3%
¥501,400 – 626,799	5.2%
¥626,800 – 783,499	12.5%
¥783,500 – 940,199	7.8%
¥940,200 – 1,096,899	2.6%
¥1,096,900-1,253,599	13.7%
¥1,253,600 – 1,560,799	2.6%
¥1,560,800+	22.2%



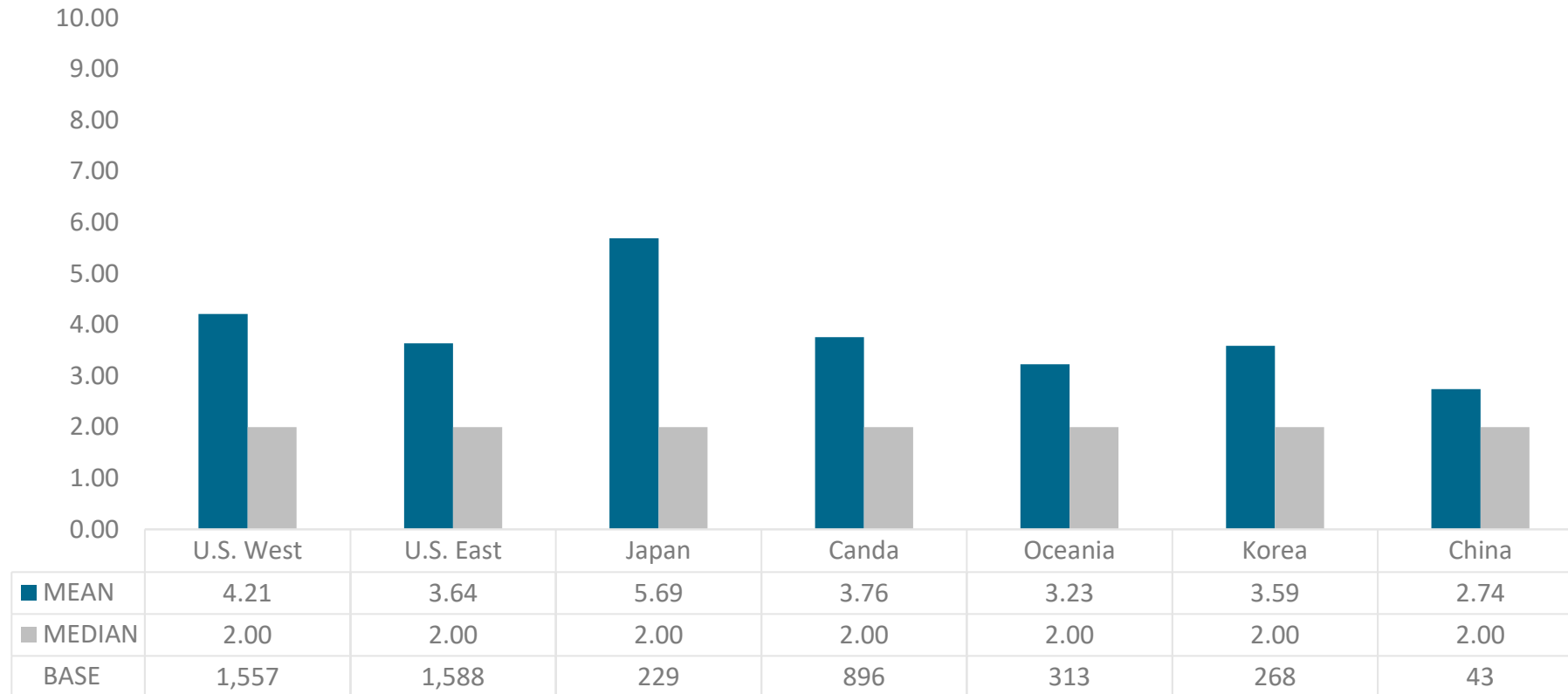
# VISITOR PROFILE - AGE



# 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	China
<b>My spouse</b>	58.5%	59.8%	59.8%	61.9%	59.9%	75.0%	75.0%
<b>Other adult members of my family</b>	30.7%	25.9%	19.3%	26.6%	21.8%	14.4%	14.4%
<b>My child(ren)/ grandchild(ren) under 18</b>	23.2%	16.4%	10.1%	17.7%	28.8%	13.3%	13.3%
<b>My friends/ associates</b>	14.0%	15.7%	16.1%	16.5%	13.4%	6.3%	6.3%
<b>Myself only (traveled alone/ no one else)</b>	10.9%	12.8%	13.1%	8.6%	14.7%	5.4%	5.4%
<b>My girlfriend/ boyfriend</b>	7.0%	5.3%	2.2%	5.6%	3.2%	1.9%	1.9%
<b>Same gender partner</b>	1.2%	1.0%	0.0%	0.9%	0.3%	0.0%	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	683	3.75
U.S. East	933	3.21
Japan	215	6.68
Canada	373	5.07
Oceania	309	5.58
Korea	253	6.16
China	37	16.11
All MMAs	2,803	1.85

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



# METHODOLOGY & SAMPLE SIZE - ISLAND VSAT KAUA'I

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

MMA	Completed	Margin of Error +
U.S. West	288	5.77
U.S. East	338	5.33
Japan	1	98.00
Canada	201	6.91
Oceania	10	30.99
Korea	12	28.229
China	1	98.00
All MMAs	851	3.36

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



# METHODOLOGY & SAMPLE SIZE - ISLAND VSAT MAUI

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

MMA	Completed	Margin of Error +
U.S. West	387	4.98
U.S. East	384	5.00
Japan	3	56.58
Canada	228	6.49
Oceania	23	20.43
Korea	5	43.83
China	8	34.65
All MMAs	1,038	3.04

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



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

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

MMA	Completed	Margin of Error +
U.S. West	356	5.19
U.S. East	422	4.77
Japan	25	19.60
Canada	324	5.44
Oceania	23	20.43
Korea	53	13.46
China	11	29.55
All MMAs	1,214	2.81

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