

# VISITOR SATISFACTION STUDY QUARTER 1, 2024

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 1, 2024 report include 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, Europe, Korea and China.

Visitor market	Completed	Margin of Error $\pm$	Response Rate
U.S. West	1,476	2.55	16.58%
U.S. East	1,821	2.30	23.24%
Japan	261	6.07	24.08%
Canada	913	3.24	23.86%
Oceania	279	5.87	16.38%
Korea	247	6.24	42.73%
China	46	14.45	5.71%
Europe	495	4.40	14.75%
All visitor markets	5,538	1.32	19.71%

# 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, China and Europe 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.

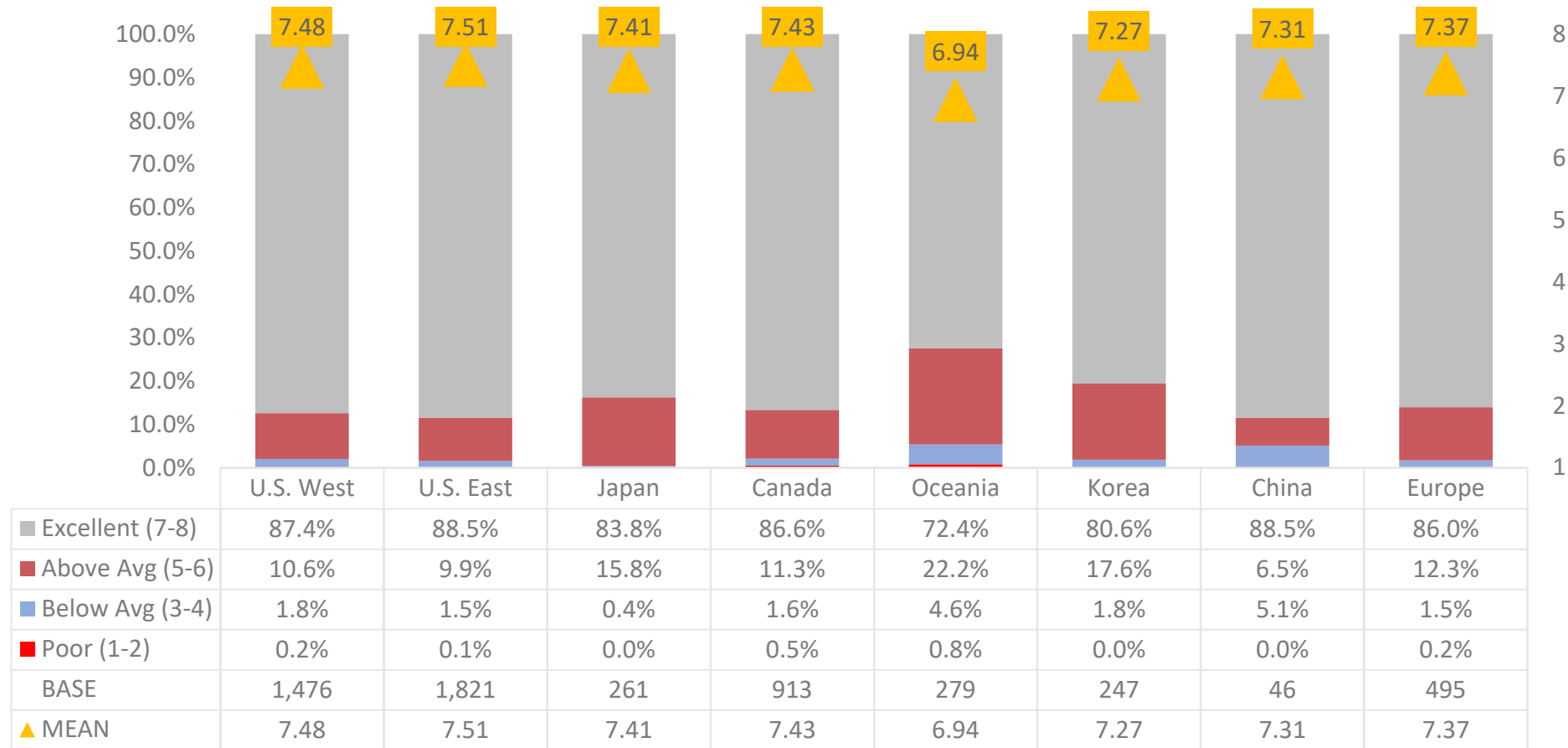
Collected data were statistically adjusted to reflect the distribution of cases by island and first-time/repeat visitor status in the In-Flight and International Departure surveys. Data were statistically adjusted to be representative of the population of visitor parties entering Hawai'i during the quarter. Data were reported as weighted data based on weights generated for Quarter 1, 2024. 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



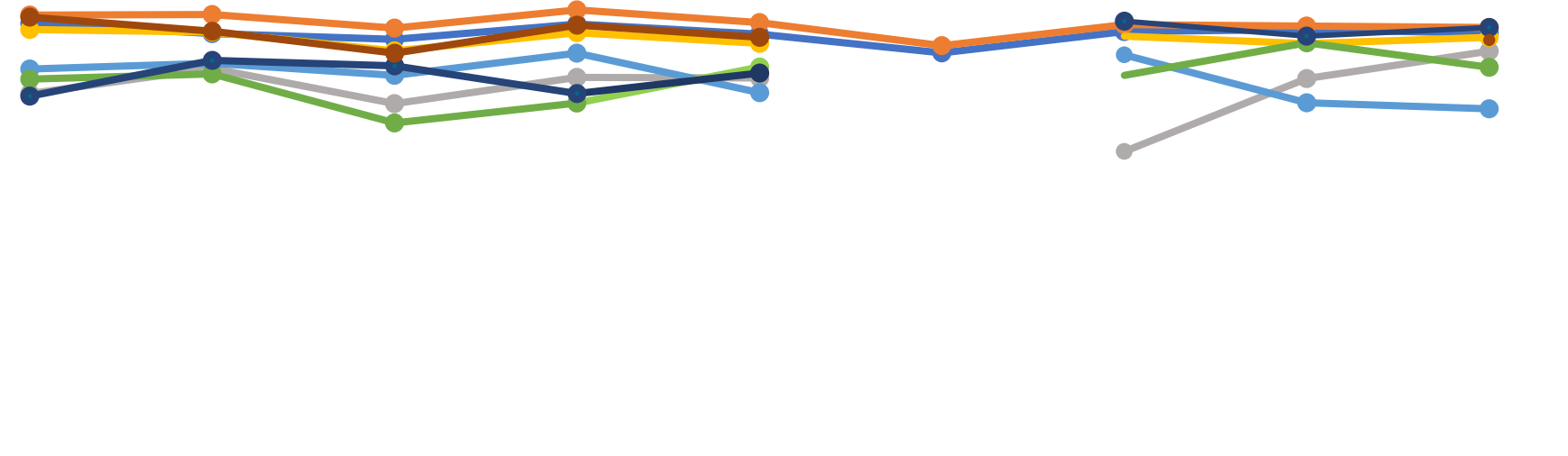
# Satisfaction - State of Hawai'i by Visitor Market

- **Gender:** Female respondents from **U.S. West** and **U.S. East** gave higher satisfaction scores than male respondents from these visitor markets.
- **Age:** Visitors from **U.S. West** under the age of 50 gave higher satisfaction scores compared to older travelers. Satisfaction was also higher amongst younger travelers from **Japan** under the age of 35 compared to older respondents from this market.
- **Education:** Travelers from **U.S. West** and **Japan** without a college degree gave higher satisfaction scores for their trip than more educated segments from these travel markets.
- **Travel party size:** Visitors from **U.S. East** 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.
- **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%



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	89.3%	87.3%	86.2%	89.2%	87.2%	83.5%	87.7%	88.1%	87.4%
U.S. East	91.0%	91.1%	88.4%	92.0%	89.5%	84.9%	89.1%	88.8%	88.5%
Japan	75.4%	80.4%	73.4%	78.6%	78.5%		63.9%	78.4%	83.8%
Canada	88.1%	87.6%	83.9%	87.5%	85.4%		86.8%	85.3%	86.6%
Oceania	80.3%	81.4%	79.0%	83.4%	75.6%		83.1%	73.6%	72.4%
Korea	78.3%	79.3%	69.6%	73.5%	80.7%		79.0%	85.5%	80.6%
China	74.9%	82.0%	80.9%	75.4%	79.5%		89.8%	86.8%	88.5%
Europe	90.6%	87.8%	83.4%	89.0%	86.6%				86.0%

P= Preliminary Data

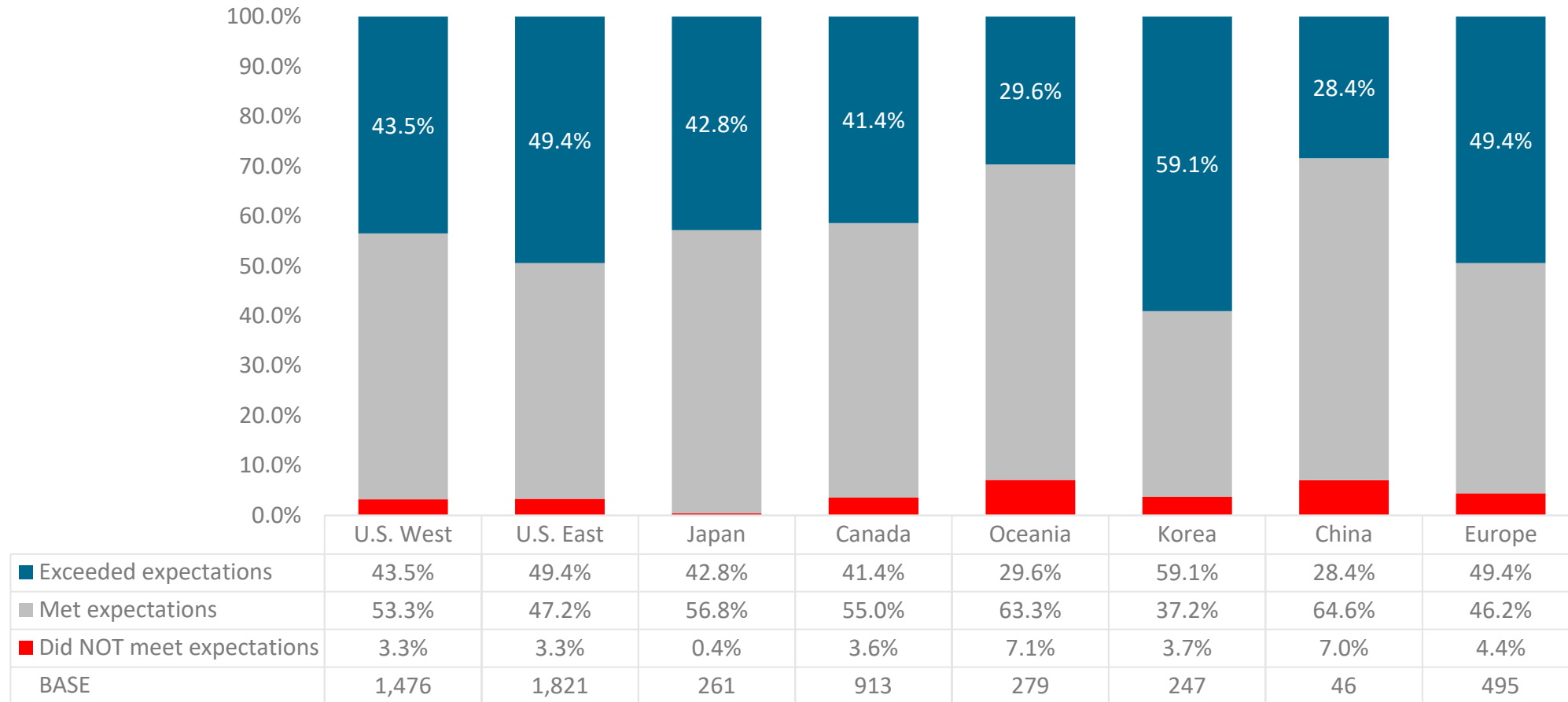
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.





# SATISFACTION - HAWAI'I TRIP EXPECTATIONS



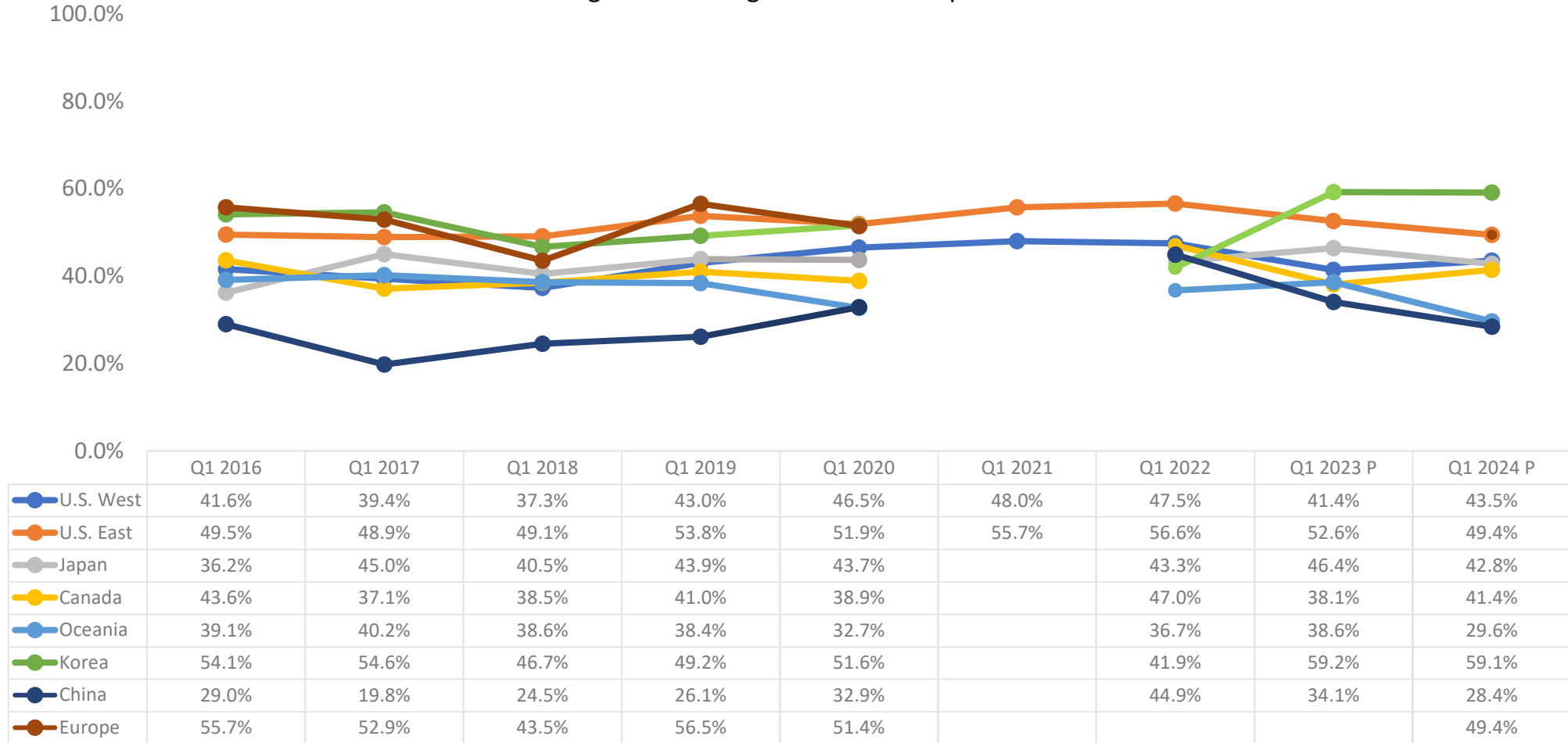
# SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***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 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 years old), and **Canada** (between 18 – 49 years old) were more likely to respond that their trip exceeded expectations compared to visitors from these markets in older 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. East** who traveled in larger travel parties (2+ persons) gave higher satisfaction scores compared to those who traveled by themselves.
- ***Islands visited:*** Visitors from **U.S. West** whose trip was limited to a single island were statistically more likely to feel their trip exceeded their expectations.

# SATISFACTION - HAWAI‘I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”

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



P= Preliminary Data

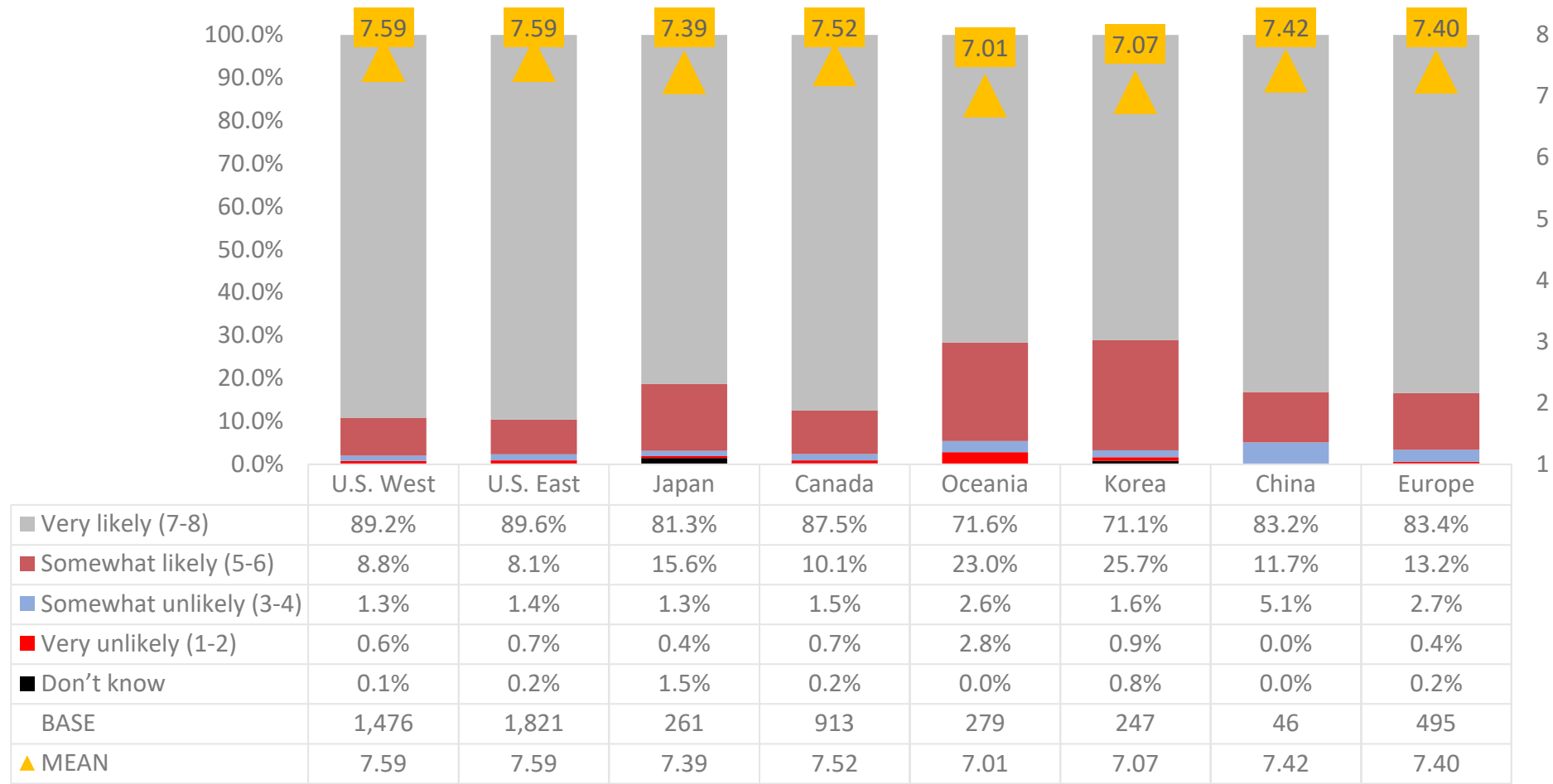
Q. Would you say this trip to Hawai‘i \_\_\_?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



# BRAND/ DESTINATION - ADVOCACY

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

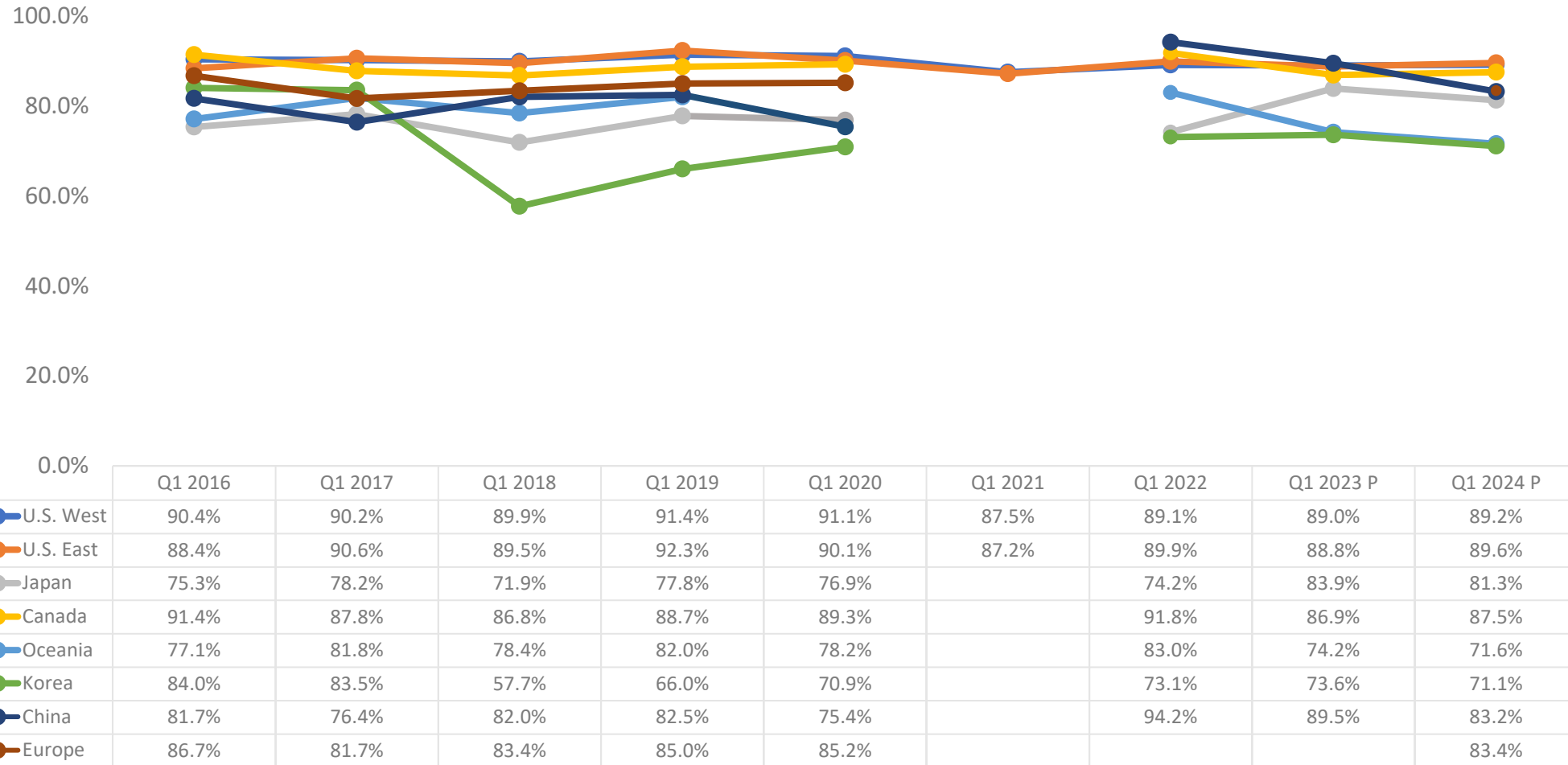


# BRAND/ DESTINATION - ADVOCACY

- **Gender:** Females from **U.S. West, U.S. East** and **Japan** were more likely to recommend the state to others than males from these visitor markets.
- **Education:** Travelers from **Japan** without a college degree were more likely to recommend the state compared to college graduates.
- **Travel party size:** Visitors in travel parties of two or more from **U.S. East** were more likely to recommend the state to others compared to those traveling by themselves.
- **Islands visited:** Visitors from **U.S. West** whose trip was limited to a single island were statistically more likely to feel as though they would recommend the state to others.

# BRAND/ DESTINATION - ADVOCACY

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



P= Preliminary Data

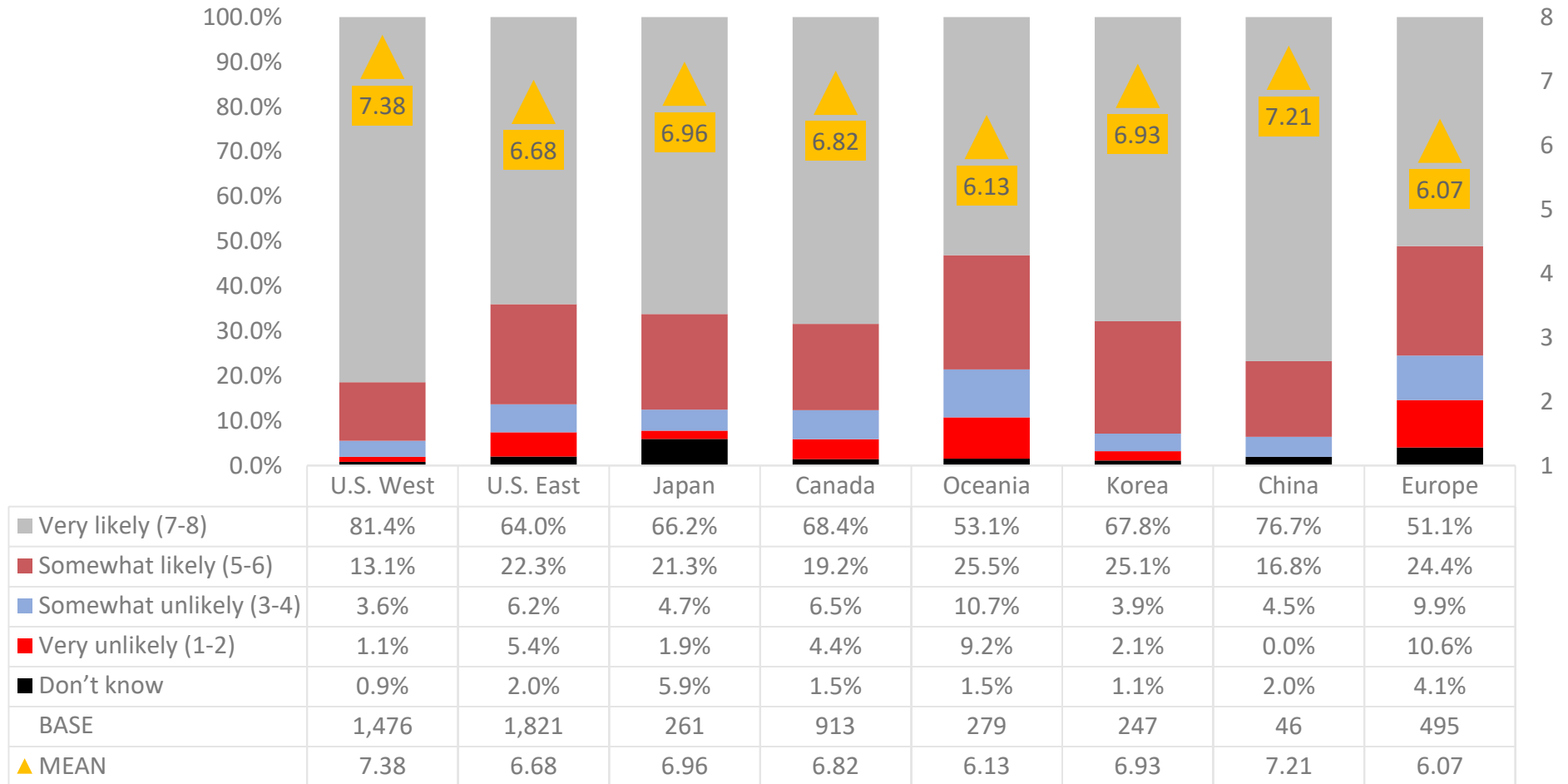
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



# LIKELIHOOD OF RETURN VISIT

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



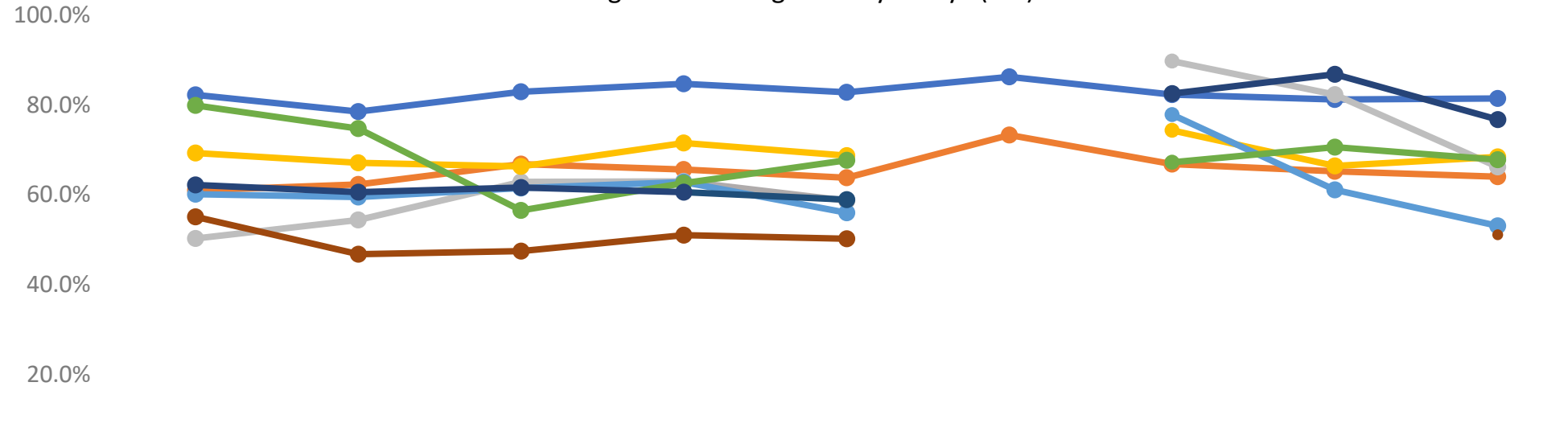
# LIKELIHOOD OF RETURN VISIT

- **Gender:** Females from **U.S. West** were more likely to anticipate a possible return to the state than males.
- **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, and Canada.**
- **Islands visited:** Visitors from **U.S. East** 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:** Travelers from **U.S. West** between the ages 35-64 years old expressed a greater likelihood of returning than other age groups from this visitor market.
- **Travel party size:** Those from **U.S. West** who traveled to the state in travel parties of one or two persons expressed a higher likelihood of return.
- **Household income:** Visitors from **U.S. West** who reside in homes in the upper income tier (\$150K+) expressed a higher probability of returning to the state.
- **Education:** Travelers without a college degree from **U.S. West** and **Japan** expressed a stronger likelihood to return.



# LIKELIHOOD OF RETURN VISIT

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	82.2%	78.5%	82.9%	84.7%	82.8%	86.2%	82.3%	81.2%	81.4%
U.S. East	61.0%	62.3%	66.8%	65.6%	63.8%	73.3%	66.8%	65.2%	64.0%
Japan	50.3%	54.4%	62.9%	63.0%	58.7%		89.7%	82.3%	66.2%
Canada	69.3%	67.1%	66.3%	71.5%	68.7%		74.3%	66.4%	68.4%
Oceania	60.1%	59.5%	61.5%	62.8%	56.0%		77.8%	61.1%	53.1%
Korea	79.9%	74.7%	56.5%	62.6%	67.7%		67.2%	70.6%	67.8%
China	62.2%	60.6%	61.6%	60.6%	58.9%		82.5%	86.8%	76.7%
Europe	55.1%	46.8%	47.5%	51.0%	50.2%				51.1%

P= Preliminary Data

Q. How likely are you to return to the state of Hawai'i in the next five years?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



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

Q1 2023 P	Q1 2024 P
45.6% Too expensive	59.7% Too expensive
34.2% Poor value	33.0% Want to go someplace new
25.3% Want to go someplace new	30.6% Poor value
22.7% Too crowded/ congested	25.6% Too crowded/ congested
17.7% Too commercialized/ overdeveloped	19.5% Five years is too soon to revisit
13.9% Five years is too soon to revisit	17.1% No compelling reason to return
13.9% No compelling reason to return	16.9% Too commercialized/ overdeveloped
11.4% Other financial obligations	12.2% Flight too long
	11.0% Poor service

P= Preliminary Data

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

Q1 2023 P	Q1 2024 P
51.7% Too expensive	55.6% Too expensive
43.1% Flight too long	44.8% Flight too long
37.4% Want to go someplace new	38.9% Want to go someplace new
21.3% Poor value	20.9% Poor value
14.8% Five years is too soon to revisit	19.3% Too crowded/ congested
14.8% Too crowded/ congested	14.4% Five years is too soon
12.6% Too commercialized/ overdeveloped	11.3% Too commercialized/ overdeveloped
11.3% No compelling reason to return	
10.0% Other financial obligations	

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS JAPAN

Q1 2023 P*	Q1 2024 P**
48.4% Too expensive	70.8% Too expensive
38.3% Want to go someplace new	39.3% Want to go someplace new
26.6% Poor value	36.6% Five years is too soon
25.0% Five years is too soon	20.9% Other financial obligations
13.3% No compelling reason to return	
13.3% Unfriendly people/ felt unwelcome	
11.7% Flight too long	
11.7% Crime/ safety concerns	

\*Caution small base (n=8 respondents) in Q1 2023.

\*\*Caution small base (n=35 respondents) in Q1 2024.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CANADA

Q1 2023 P	Q1 2024 P
63.2% Too expensive	64.9% Too expensive
35.3% Want to go someplace new	37.4% Want to go someplace new
34.7% Poor value	36.0% Flight too long
33.5% Flight too long	22.0% Five years is too soon
13.8% Too commercialized/ overdeveloped	20.7% Poor value
12.6% Too crowded/ congested	12.4% Other financial obligations
10.3% Five years is too soon to revisit	10.7% Too crowded/ congested

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q1 2023 P	Q1 2024 P
62.0% Too expensive	52.5% Too expensive
51.6% Poor value	40.5% Want to go someplace new
33.8% Want to go someplace new	30.0% Poor value
28.5% Too crowded/ congested	25.0% Too commercialized/ overdeveloped
23.7% Too commercialized/ overdeveloped	17.8% No compelling reason to return
19.0% Five years is too soon to revisit	17.0% Flight too long
13.7% No compelling reason to return	15.0% Five years is too soon
	15.0% Too crowded/ congested

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS KOREA

Q1 2023 P*	Q1 2024 P**
65.5% Too expensive	58.2% Too expensive
41.5% Poor value	31.7% No compelling reason to return
24.2% Too crowded/ congested	28.0% Poor value
17.3% Too commercialized/ overdeveloped	22.8% Flight too long
17.2% Five years is too soon to revisit	21.2% Want to go someplace new
13.8% No compelling reason to return	12.2% Five years is too soon
13.8% Flight is too long	10.6% Dirty/ filthy
13.7% Want to go someplace new	
10.4% Unfriendly people/ felt unwelcome	
10.4% Poor service	

\*Caution small base (n=24 respondents) in Q1 2023.

\*\*Caution small base (n=18 respondents) in Q1 2024.

P= Preliminary Data

# UNLIKELY TO RETURN - TOP REASONS CHINA

Q1 2023*	Q1 2024 P**
100% Too expensive	100% Too crowded/ congested
100% Flight too long	69.7% No compelling reason to return
100% Too crowded/ congested/ traffic	69.7% Too expensive
100% No reason to return/ nothing new	69.7% Poor value
	60.6% Flight too long
	30.3% Five years is too soon
	30.3% Want to go someplace new

\*Caution small base (n=1 respondent) in Q1 2023.

\*\*Caution small base (n=3 respondents) in Q1 2024.

P= Preliminary Data



# UNLIKELY TO RETURN - TOP REASONS EUROPE

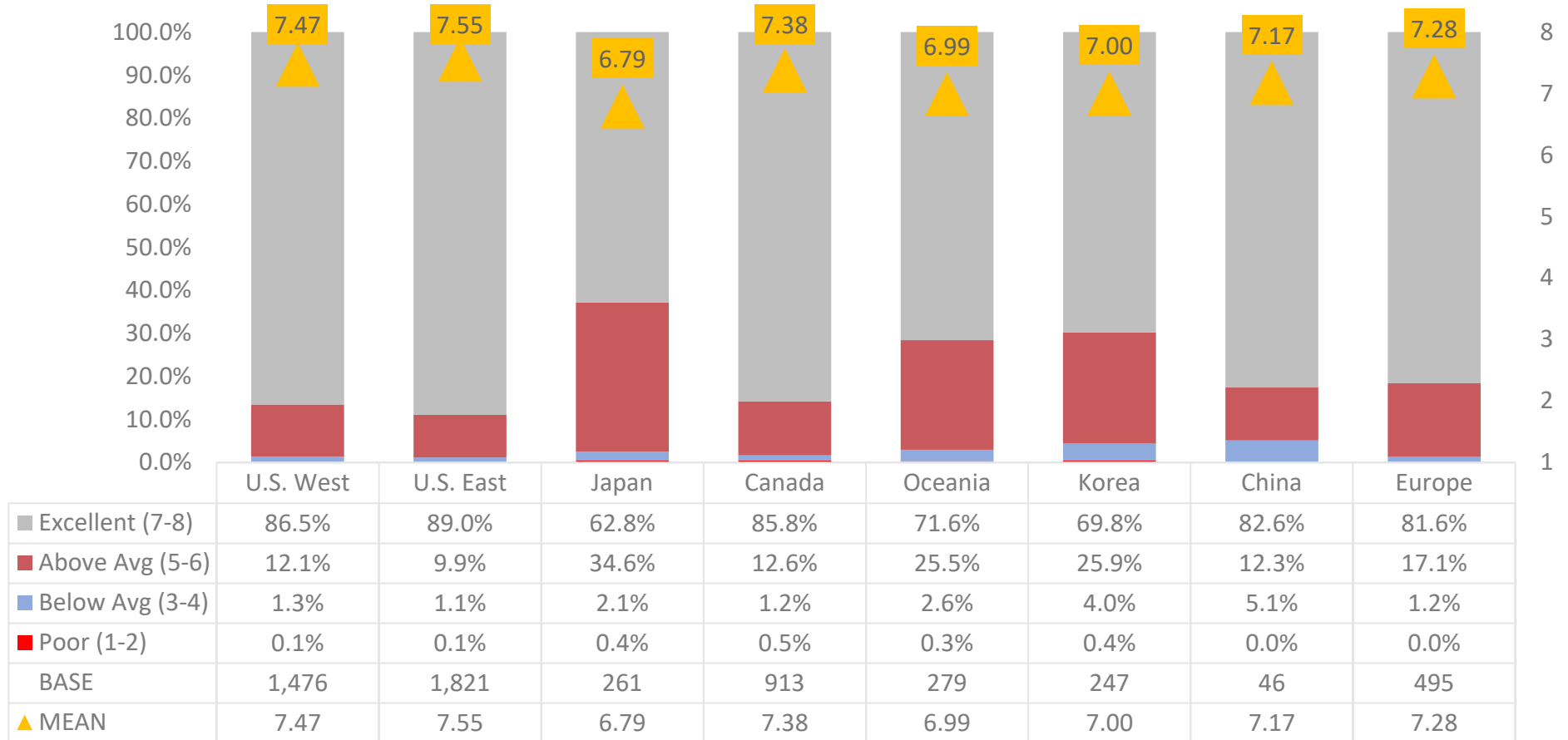
Q1 2020*	Q1 2024 P
58.0% Flight too long	58.5% Flight too long
41.8% Too expensive	57.6% Too expensive
30.0% Want to go someplace new	32.3% Want to go someplace new
16.0% Other financial obligations	17.8% Poor value
14.0% Poor value	16.8% Five years is too soon
13.3% Five years is too soon	12.1% Too commercialized/ overdeveloped
	10.7% No compelling reason to return

\*No data collected from 2021 thru 2023.

P= Preliminary Data

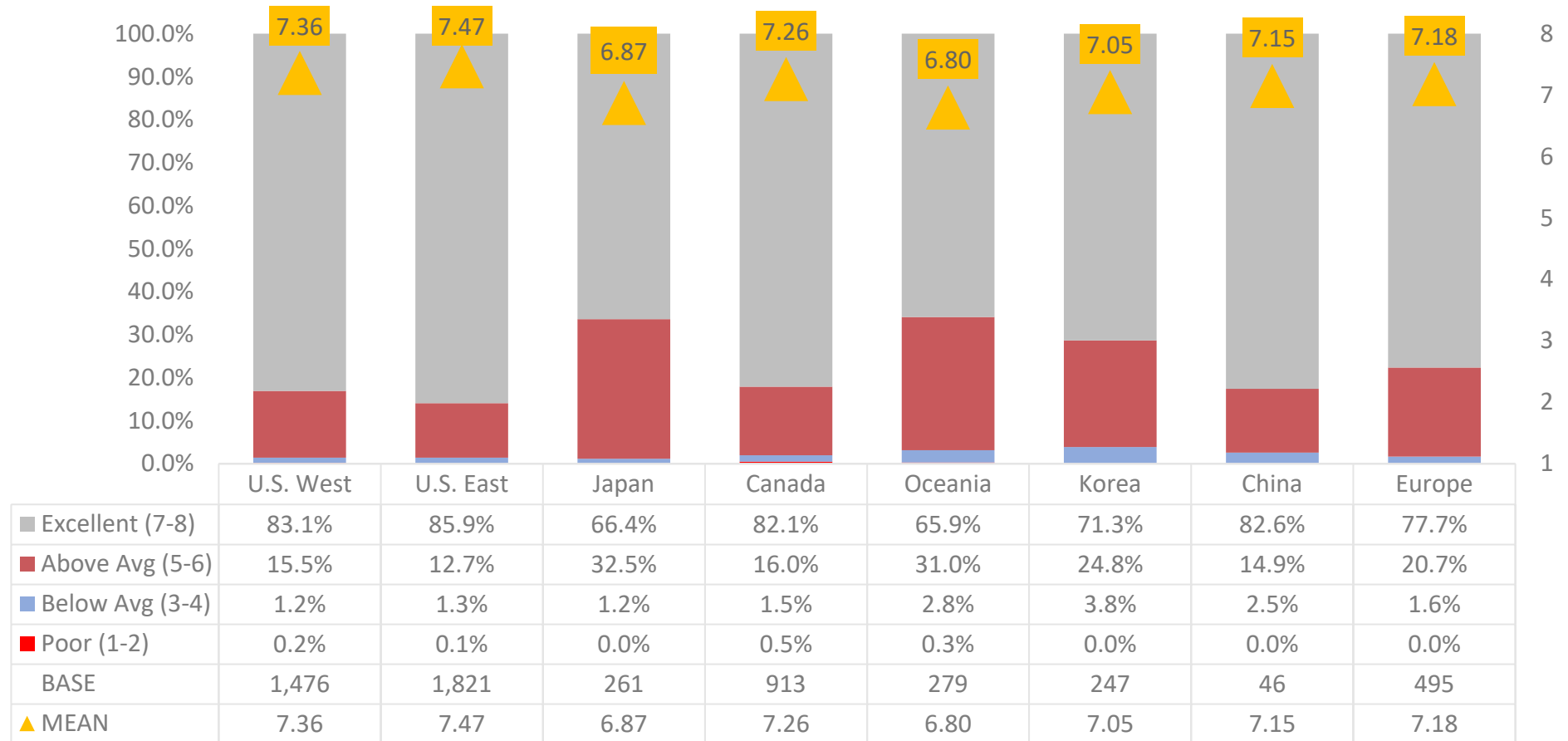
# OFFERING A VARIETY OF EXPERIENCES

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



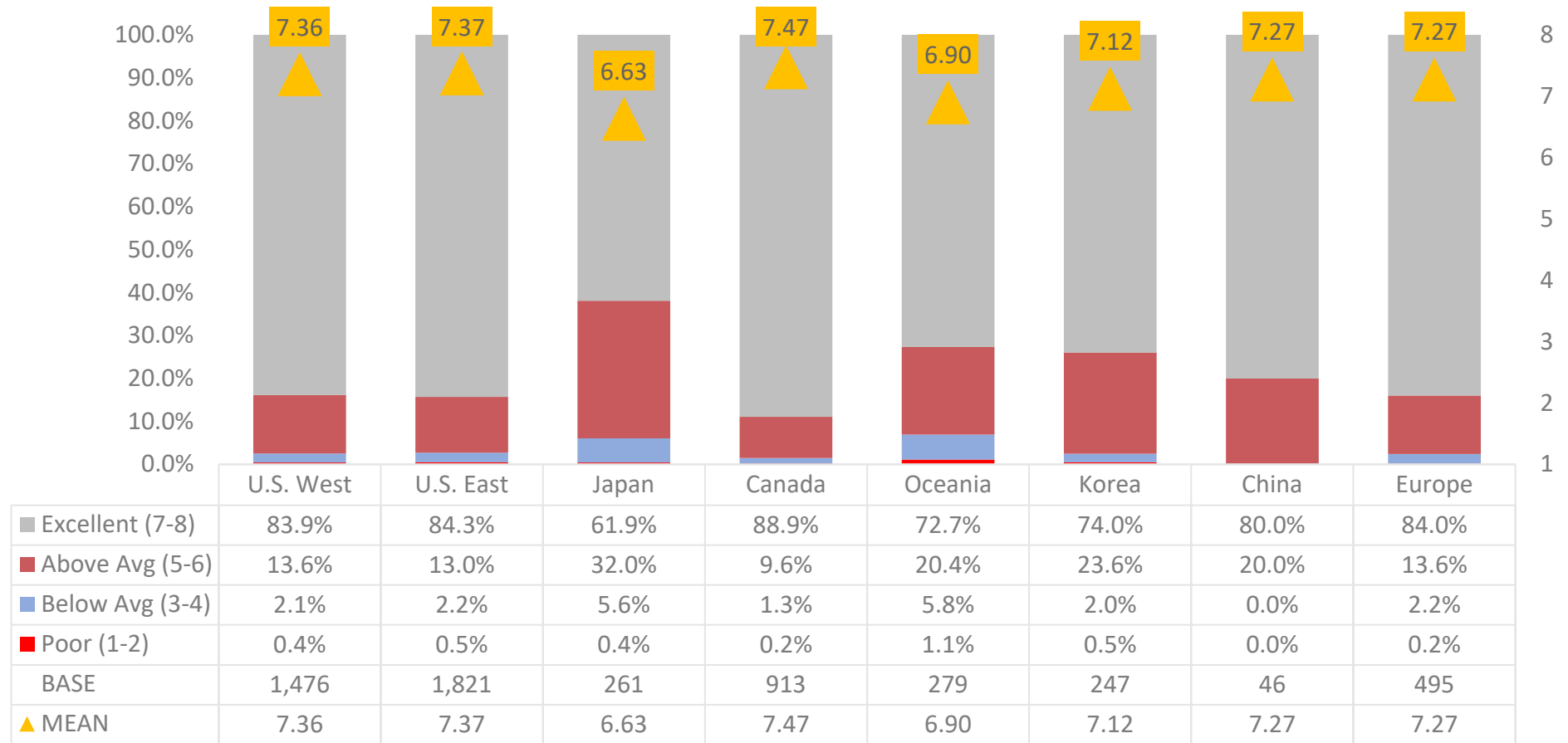
# NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



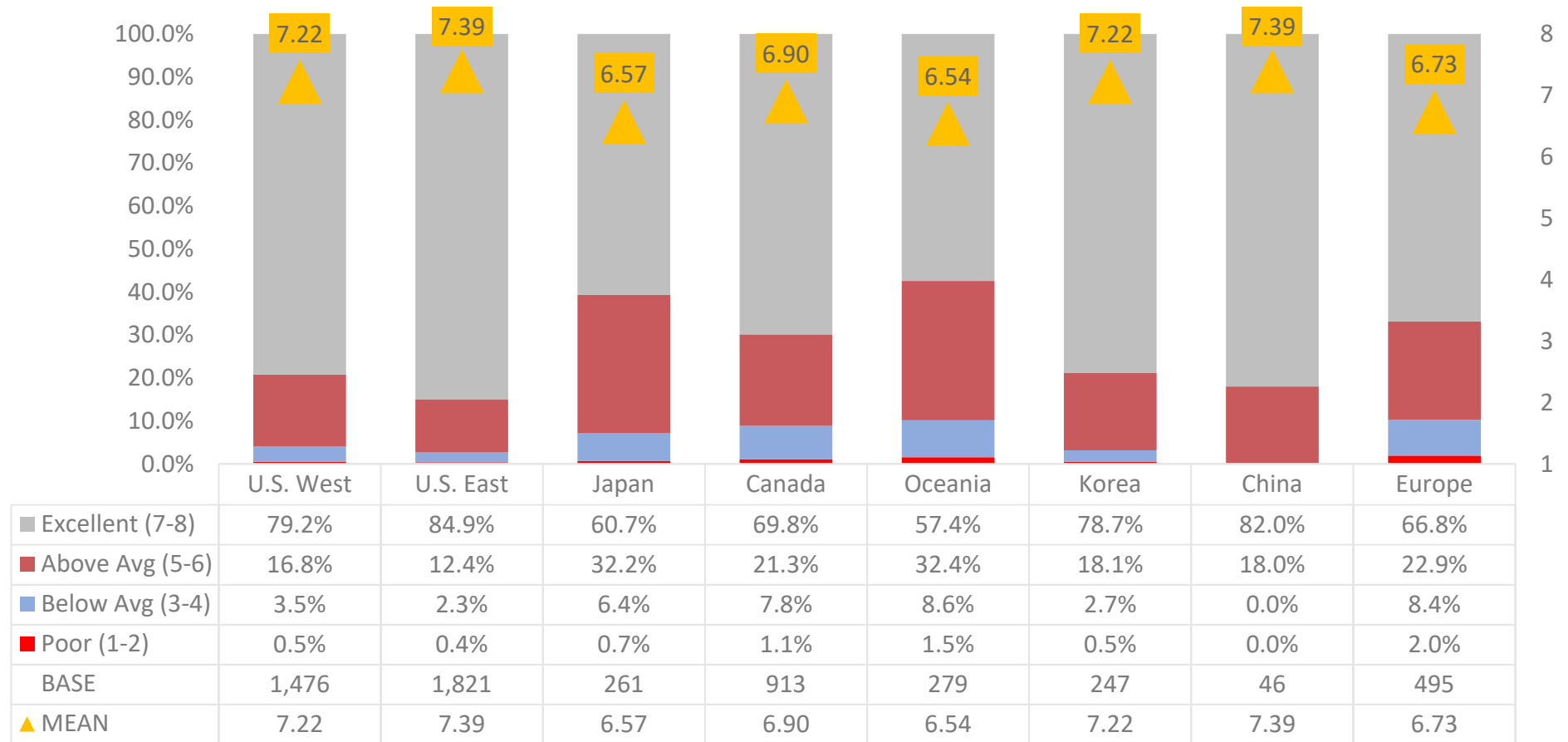
# SAFE AND SECURE DESTINATION

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



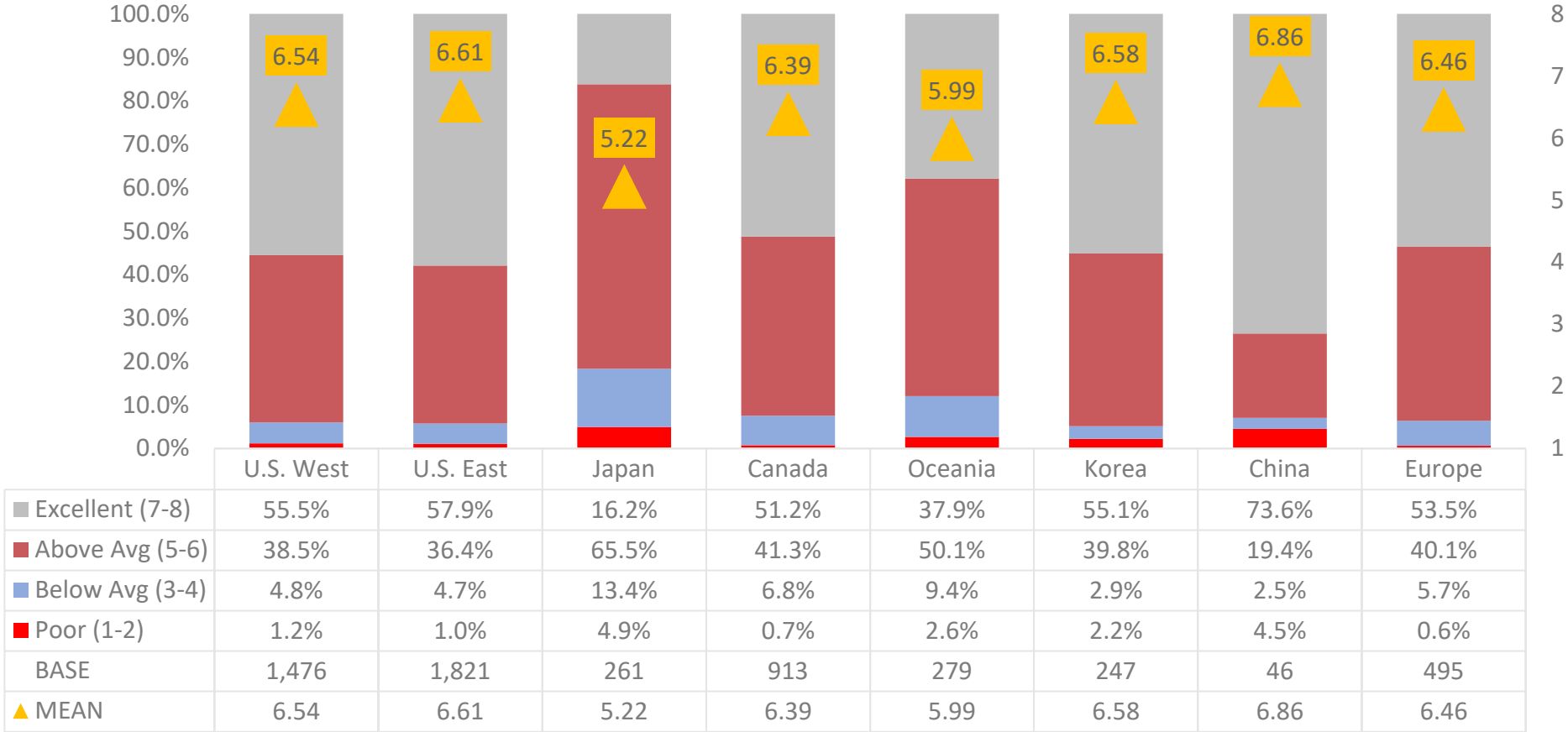
# ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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	Europe
<b>TOTAL</b>	96.7%	98.7%	96.9%	98.1%	93.6%	99.5%	97.3%	98.0%
<b>On own (self-guided)/ driving around island</b>	84.0%	81.8%	71.9%	84.4%	56.7%	84.9%	72.3%	76.5%
<b>Helicopter ride/ airplane tour</b>	3.5%	6.0%	0.6%	4.3%	4.5%	4.3%	2.7%	10.6%
<b>Boat tour/ submarine ride/ whale watching</b>	26.8%	35.5%	9.4%	27.1%	13.7%	32.6%	43.2%	30.4%
<b>Visit towns/ communities</b>	53.9%	54.8%	36.3%	59.0%	32.9%	38.3%	23.6%	44.0%
<b>Private limousine/ van tour/ tour bus</b>	7.0%	12.8%	13.0%	8.0%	28.5%	10.7%	8.2%	13.0%
<b>Scenic views/ natural landmarks</b>	59.5%	67.8%	21.3%	67.7%	47.8%	63.9%	70.5%	63.0%
<b>Movie/ TV/ film location tours</b>	3.7%	6.1%	6.6%	5.1%	7.6%	21.4%	6.8%	8.4%



# ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	96.2%	96.2%	92.8%	98.4%	91.3%	98.9%	95.9%	96.2%
<b>Beach/ sunbathing</b>	83.6%	82.3%	74.8%	87.1%	76.0%	84.6%	83.0%	81.9%
<b>Bodyboarding</b>	10.7%	6.8%	0.9%	14.1%	2.2%	3.1%	0.0%	4.0%
<b>Standup paddle boarding</b>	5.2%	3.7%	0.6%	4.1%	4.0%	3.5%	6.8%	3.7%
<b>Surfing</b>	6.2%	5.5%	2.5%	9.4%	7.4%	13.7%	5.3%	11.1%
<b>Canoe paddling</b>	1.3%	1.1%	0.4%	1.5%	1.3%	2.9%	2.0%	1.9%
<b>Kayaking</b>	3.9%	4.3%	0.4%	3.0%	1.5%	3.1%	4.7%	4.4%
<b>Swimming in the ocean</b>	59.2%	56.7%	33.4%	66.4%	56.7%	56.0%	41.2%	60.9%
<b>Snorkeling</b>	39.0%	35.1%	7.6%	42.6%	19.7%	49.6%	27.0%	38.5%
<b>Freediving</b>	1.0%	0.8%	0.4%	1.4%	0.8%	0.4%	4.1%	0.8%
<b>Windsurfing/ Kitesurfing</b>	0.1%	0.2%	0.0%	0.3%	0.3%	0.4%	0.0%	0.5%
<b>Jet skiing/ Parasailing</b>	0.8%	1.1%	1.8%	0.8%	0.5%	2.1%	0.0%	0.4%
<b>Scuba diving</b>	2.5%	1.7%	0.6%	2.1%	0.3%	0.9%	5.3%	2.7%
<b>Fishing</b>	2.8%	2.7%	0.0%	2.5%	0.0%	1.4%	2.0%	0.9%
<b>Golf</b>	7.8%	7.2%	3.0%	9.7%	2.6%	7.8%	2.7%	3.7%
<b>Running/ jogging/ fitness/ walking</b>	33.3%	31.3%	22.3%	36.6%	27.1%	17.1%	23.0%	20.0%

# ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	96.2%	96.2%	92.8%	98.4%	91.3%	98.9%	95.9%	96.2%
<b>Cycling</b>	2.5%	2.2%	2.2%	5.1%	1.8%	1.1%	5.3%	3.7%
<b>Spa</b>	6.6%	8.9%	2.8%	5.8%	9.7%	7.4%	0.0%	4.6%
<b>Hiking</b>	41.9%	47.9%	21.0%	47.9%	21.5%	27.0%	39.1%	45.5%
<b>Backpacking/ camping</b>	1.1%	1.4%	0.0%	2.3%	0.0%	1.6%	6.1%	3.0%
<b>Agritourism</b>	12.5%	13.3%	6.1%	10.2%	3.0%	20.0%	8.2%	7.2%
<b>Sports event or tournament</b>	1.8%	1.9%	1.3%	1.6%	1.6%	1.7%	2.7%	1.7%
<b>Parks/ botanical gardens</b>	35.6%	42.2%	25.8%	38.5%	30.5%	26.2%	28.5%	37.9%
<b>Waterparks</b>	1.5%	1.2%	1.1%	1.4%	1.0%	2.9%	2.0%	0.7%
<b>Mountain tubing/ waterfall rappel</b>	2.0%	1.5%	0.3%	2.3%	0.6%	0.4%	6.8%	2.7%
<b>Zip-lining</b>	3.5%	3.3%	0.0%	2.3%	1.0%	0.8%	2.0%	1.9%
<b>Skydiving</b>	0.4%	0.6%	1.5%	0.3%	0.0%	0.5%	2.0%	0.6%
<b>All-terrain vehicle (ATV)</b>	2.0%	4.2%	0.3%	2.4%	4.8%	9.6%	0.0%	1.6%
<b>Horseback riding</b>	0.7%	1.8%	2.0%	0.7%	0.3%	0.5%	0.0%	1.0%

# ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	98.5%	97.9%	98.5%	98.1%	99.0%	98.4%	93.2%	97.4%
<b>Lunch/ sunset/ dinner/ evening cruise</b>	20.0%	24.7%	13.3%	21.9%	14.7%	37.8%	51.2%	26.9%
<b>Live music/ stage show</b>	29.0%	30.3%	17.5%	28.8%	17.4%	17.2%	13.5%	26.2%
<b>Nightclub/ dancing/ bar/ karaoke</b>	7.0%	6.7%	2.9%	6.6%	9.1%	3.4%	2.0%	6.9%
<b>Fine dining</b>	47.0%	45.5%	39.4%	39.7%	28.5%	49.8%	35.9%	28.5%
<b>Family restaurant</b>	62.3%	60.8%	29.6%	64.7%	69.0%	47.5%	16.8%	41.8%
<b>Fast food</b>	29.9%	31.1%	57.0%	40.9%	54.3%	62.4%	49.4%	43.6%
<b>Food truck</b>	43.9%	42.3%	20.7%	43.5%	35.3%	59.2%	27.7%	40.0%
<b>Café/ coffee house</b>	52.3%	50.0%	57.7%	58.0%	66.1%	65.1%	44.5%	57.5%
<b>Ethnic dining</b>	26.0%	28.8%	5.3%	18.6%	17.6%	25.7%	23.8%	13.1%
<b>Farm-to-table cuisine</b>	18.7%	20.8%	14.1%	11.4%	3.9%	3.7%	6.8%	8.8%
<b>Prepared own meal</b>	47.9%	39.3%	23.5%	59.3%	23.6%	18.9%	13.5%	42.3%

# ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	95.9%	95.3%	97.6%	97.8%	93.0%	97.1%	95.9%	96.3%
<b>Malls/ department stores</b>	41.9%	39.6%	84.7%	53.6%	68.4%	78.0%	65.6%	54.1%
<b>Designer boutiques</b>	16.3%	18.3%	18.0%	16.1%	14.5%	3.7%	10.0%	12.2%
<b>Hotel/ resort stores</b>	32.7%	37.6%	30.9%	33.5%	36.4%	32.8%	19.5%	23.8%
<b>Swap meet/ flea market</b>	16.2%	14.1%	3.2%	12.0%	7.7%	3.1%	0.0%	6.3%
<b>Discount/ outlet stores</b>	12.1%	12.2%	23.0%	13.1%	28.1%	62.2%	7.4%	16.7%
<b>Supermarkets</b>	60.0%	52.3%	56.4%	67.4%	41.7%	49.0%	52.7%	62.8%
<b>Farmer's market</b>	36.5%	33.4%	13.4%	43.0%	18.8%	10.3%	16.8%	33.6%
<b>Convenience stores</b>	49.7%	47.8%	53.7%	55.0%	67.3%	57.3%	56.1%	38.9%
<b>Duty free stores</b>	4.2%	5.0%	27.8%	6.4%	13.3%	40.6%	17.0%	7.2%
<b>Hawai'i-made products</b>	45.5%	49.4%	17.1%	46.5%	31.0%	29.7%	34.4%	43.0%
<b>Local shops and artisans</b>	54.7%	59.7%	9.0%	57.8%	37.0%	16.2%	24.8%	45.4%
<b>Local fashion designers</b>	7.4%	6.8%	3.3%	8.8%	6.1%	0.4%	5.3%	11.1%

# ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	66.4%	74.7%	53.0%	74.7%	72.4%	68.9%	71.7%	72.1%
<b>Historic military sites and museums</b>	18.2%	28.9%	10.6%	19.3%	43.8%	23.7%	32.8%	32.5%
<b>Historic Hawaiian sites and museums</b>	31.4%	36.8%	13.0%	36.3%	26.8%	11.0%	35.7%	33.3%
<b>Other historical sites, museums, and homes</b>	14.7%	16.8%	7.6%	14.2%	9.8%	20.7%	18.2%	15.5%
<b>Art museums</b>	3.7%	3.2%	2.4%	2.6%	4.0%	5.4%	6.8%	3.8%
<b>Art galleries and exhibitions</b>	8.9%	9.8%	1.6%	10.7%	10.1%	1.6%	0.0%	8.2%
<b>Lū'au/ Polynesian show/ hula show</b>	22.6%	34.3%	15.1%	26.6%	22.1%	20.6%	10.9%	24.2%
<b>Lesson- ex. ukulele, hula, canoe, lei making</b>	4.9%	7.0%	10.1%	5.0%	4.1%	6.4%	0.0%	5.6%
<b>Play/ concert/ theatre</b>	3.0%	2.7%	2.5%	4.3%	1.5%	3.9%	2.0%	4.3%
<b>Art/ craft fair</b>	12.4%	9.9%	3.2%	13.2%	5.1%	4.2%	2.0%	5.2%
<b>Festival /event</b>	5.1%	4.0%	3.1%	3.7%	5.8%	6.5%	0.0%	2.4%

# ACTIVITIES - TRANSPORTATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	92.0%	91.2%	96.6%	94.7%	97.9%	97.5%	93.2%	91.7%
<b>Airport shuttle</b>	11.6%	15.6%	24.1%	16.2%	26.7%	10.0%	8.8%	15.3%
<b>Trolley</b>	1.8%	2.4%	46.1%	2.5%	11.4%	20.3%	4.7%	4.2%
<b>Public bus</b>	5.3%	4.7%	26.7%	9.3%	18.0%	11.9%	15.6%	18.7%
<b>Tour bus/ tour van</b>	6.7%	13.1%	15.6%	9.6%	20.9%	24.8%	15.0%	12.8%
<b>Taxi/ limo</b>	7.2%	9.2%	27.3%	10.3%	31.8%	22.6%	17.6%	17.2%
<b>Rental car</b>	71.1%	68.3%	24.9%	73.6%	35.3%	57.3%	51.2%	61.7%
<b>Ride share</b>	19.4%	20.4%	26.3%	19.0%	47.2%	23.4%	30.5%	23.2%
<b>Car share (i.e., Hui, Turo)</b>	4.6%	4.3%	1.3%	5.9%	4.6%	3.4%	0.0%	3.3%
<b>Bicycle rental</b>	1.7%	2.2%	2.7%	2.6%	1.5%	1.5%	2.7%	2.4%

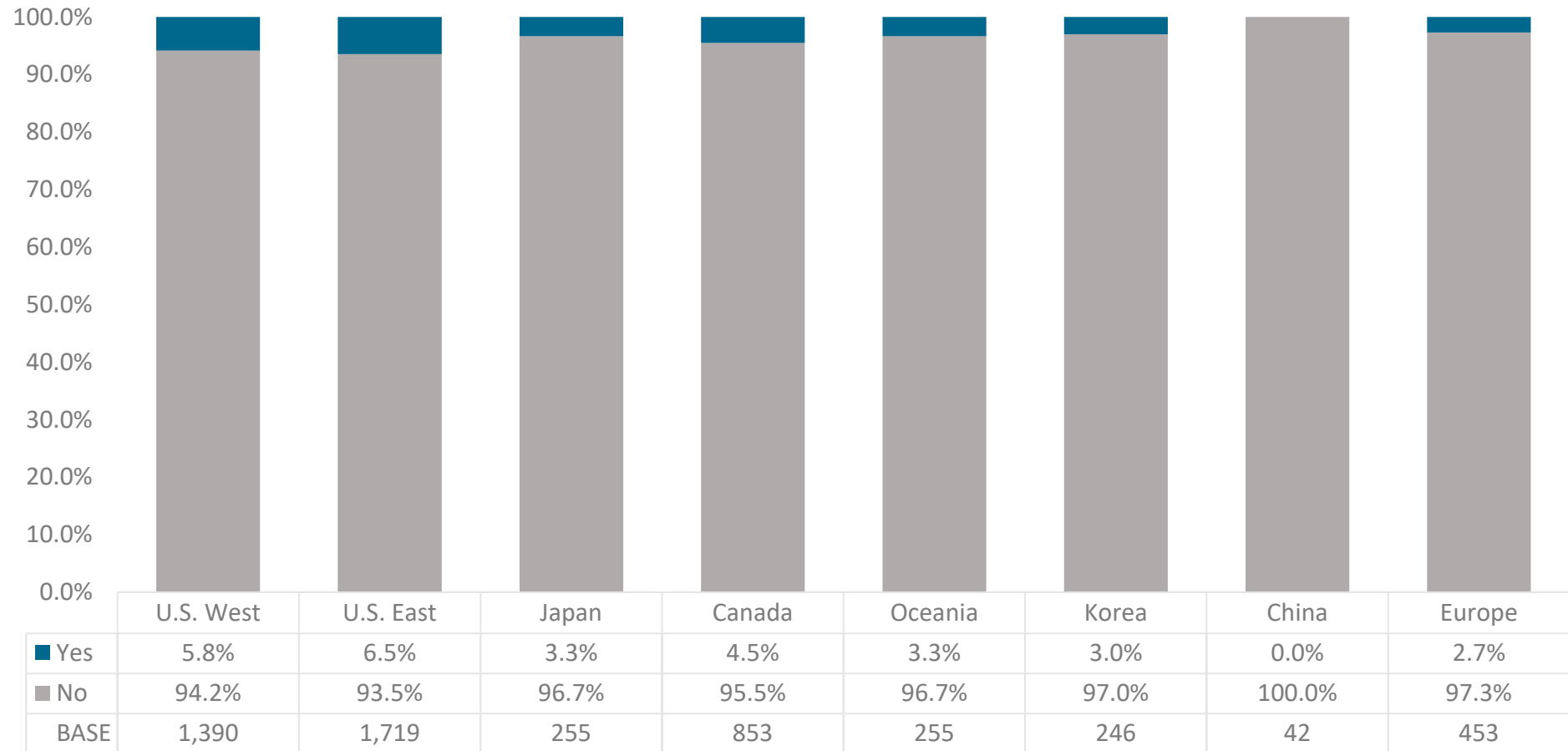
# ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>TOTAL</b>	35.2%	31.0%	14.4%	24.6%	11.8%	25.9%	17.4%	25.6%
<b>Visit friends/ family</b>	33.4%	29.3%	13.6%	22.0%	10.8%	25.9%	17.4%	21.1%
<b>Volunteering/ Giving back to the local community</b>	3.4%	2.6%	1.2%	3.0%	1.3%	0.4%	2.7%	4.7%

# Section 3 – Travelers with Disabilities



# DISABLED TRAVELER - REQUIRED ASSISTANCE

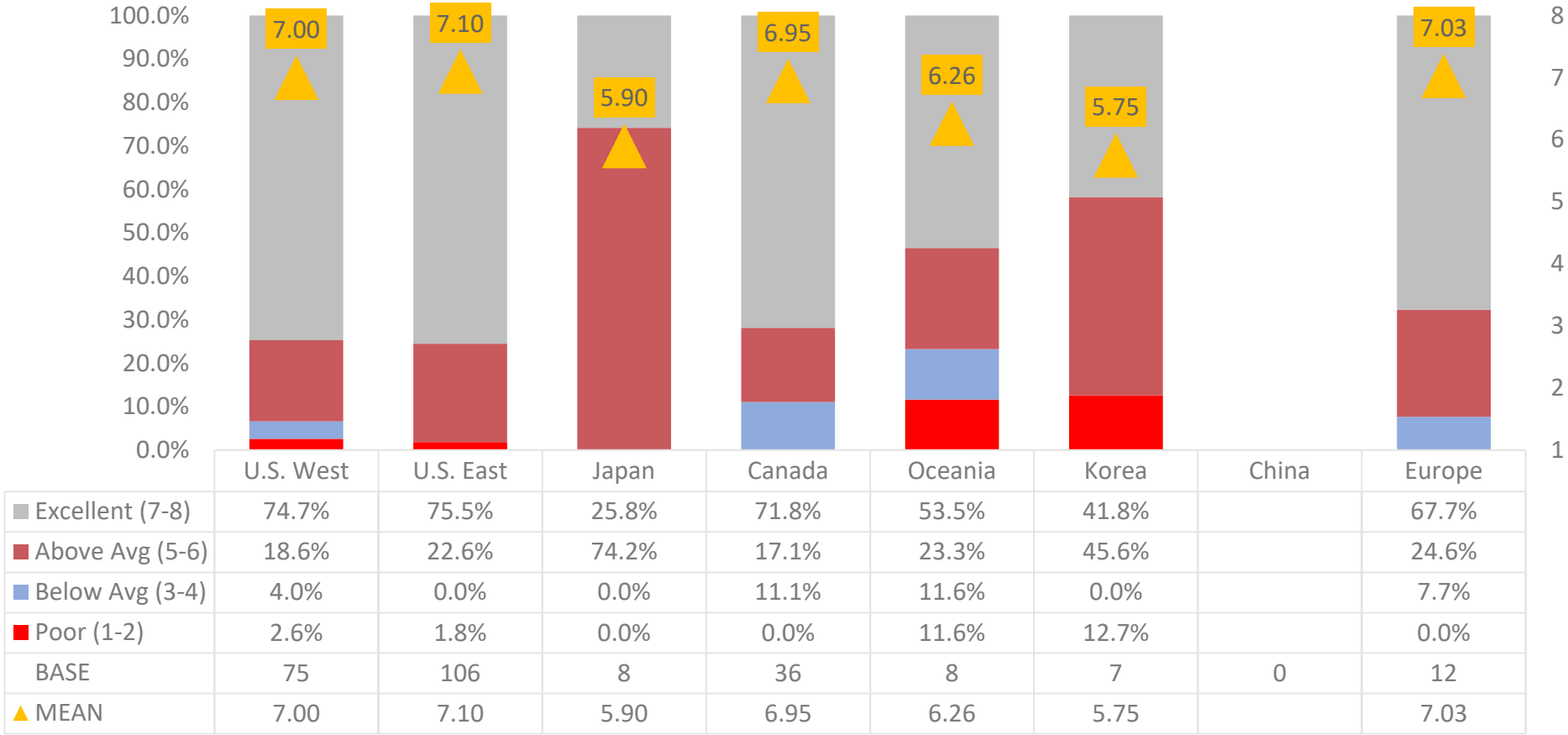


# DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Mobility aid	71.3%	69.0%	51.7%	61.8%	64.7%	29.1%	0.0%	60.1%
Personal assistance	29.9%	20.0%	0.0%	22.4%	25.5%	12.7%	0.0%	9.3%
NA- No one needed assistance	2.5%	7.3%	35.4%	12.1%	0.0%	58.2%	0.0%	30.7%
Orientation and Mobility Assistance	7.5%	6.4%	0.0%	5.8%	9.8%	0.0%	0.0%	9.3%
Other	5.0%	6.3%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%
Disabled parking/ placard	2.5%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Print material in alternate format	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lift equipped van	0.0%	0.0%	12.9%	2.9%	0.0%	0.0%	0.0%	0.0%
ASL Interpreter/ texting/ captioning	0.0%	0.0%	12.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Respiratory equipment	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ambulance/ Hospital/ Medical visit	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
No help was offered	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BASE	80	110	8	37	9	7	0	12

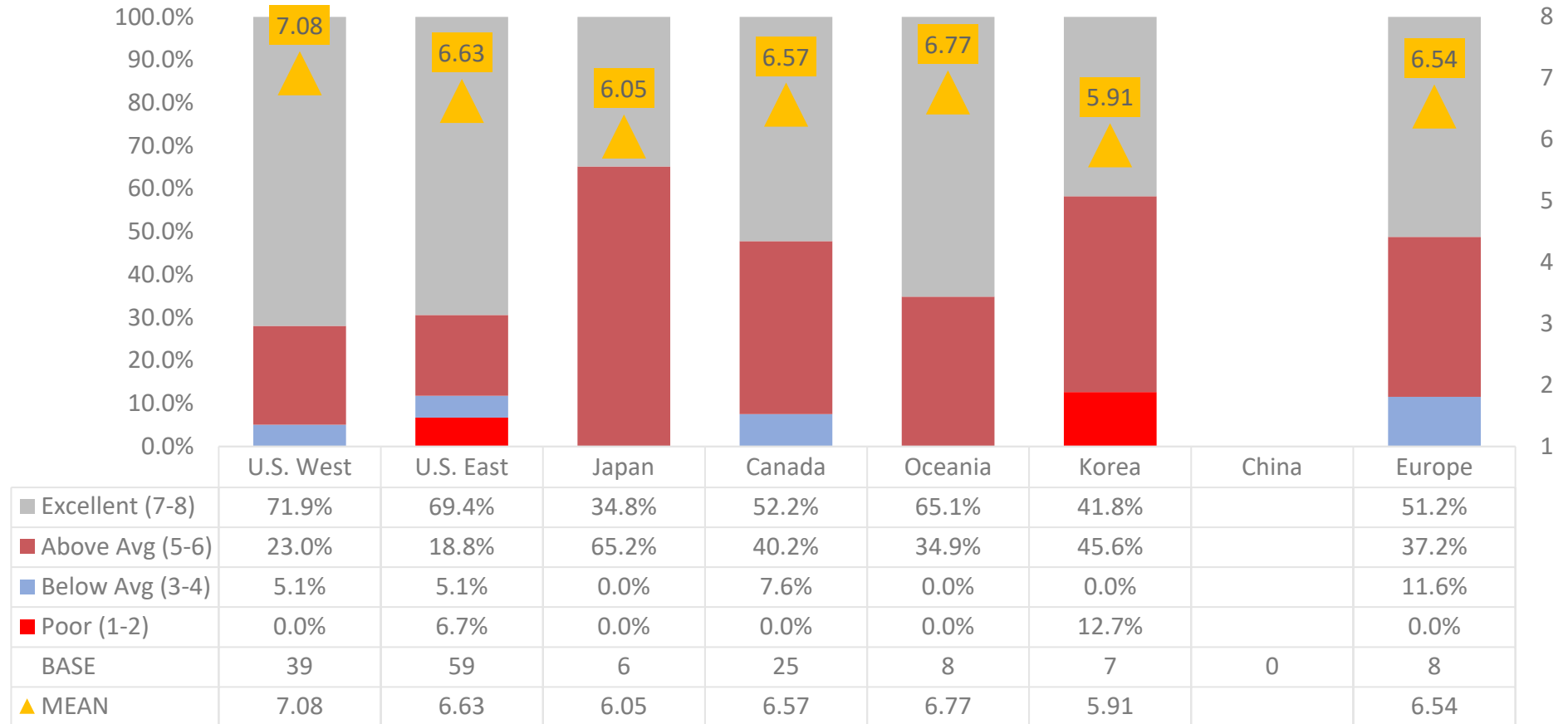
# OVERALL ACCESSIBILITY - AIRPORTS

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



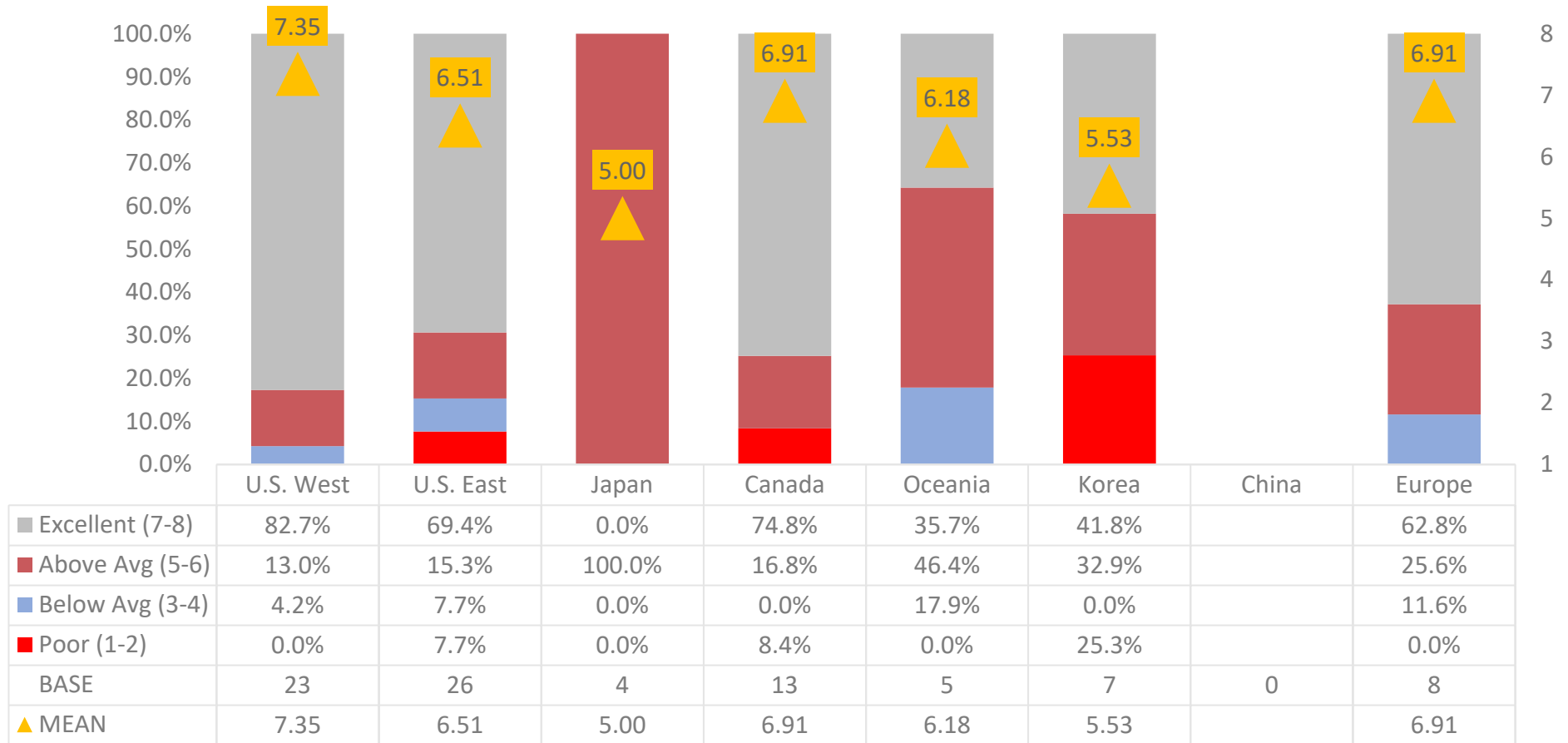
# OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



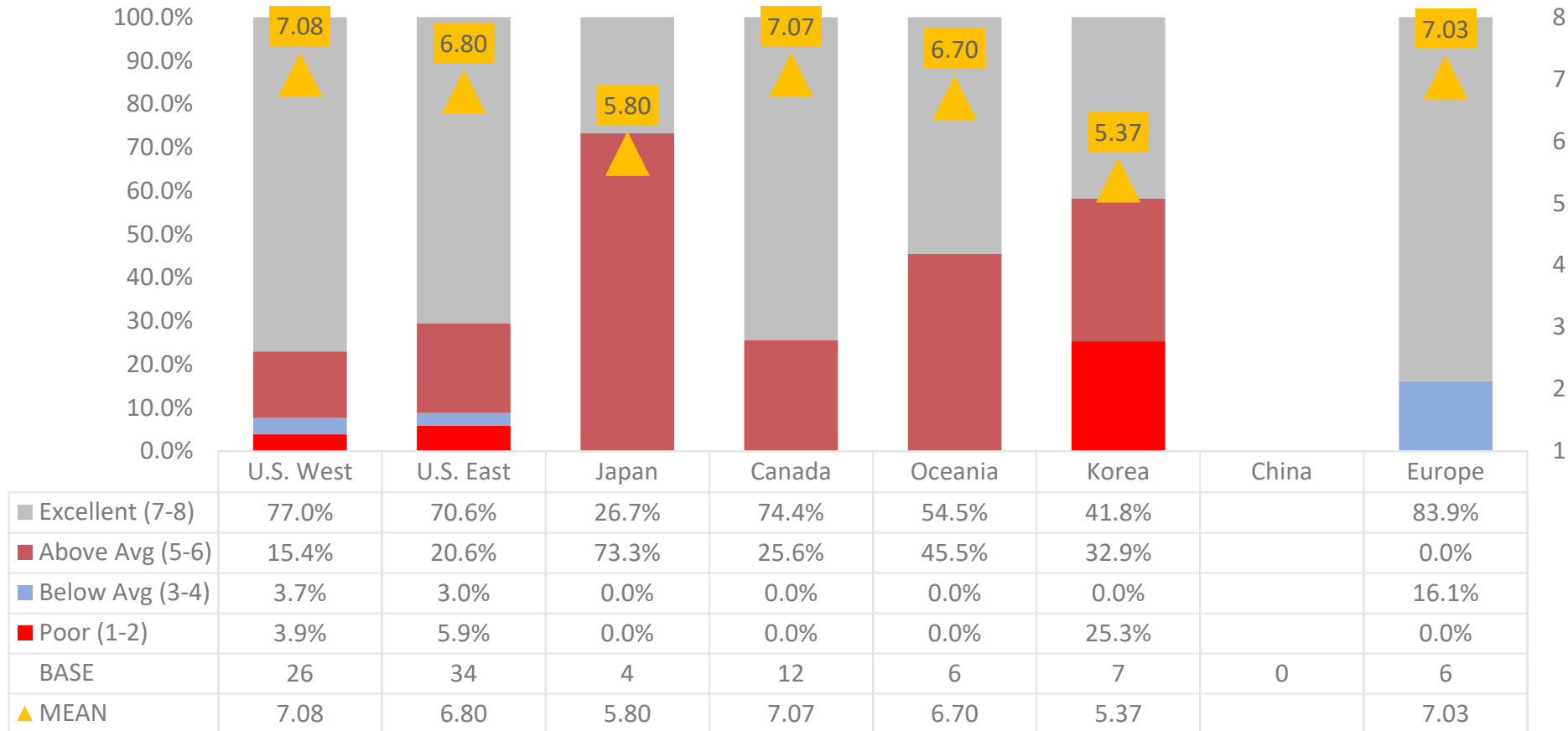
# OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



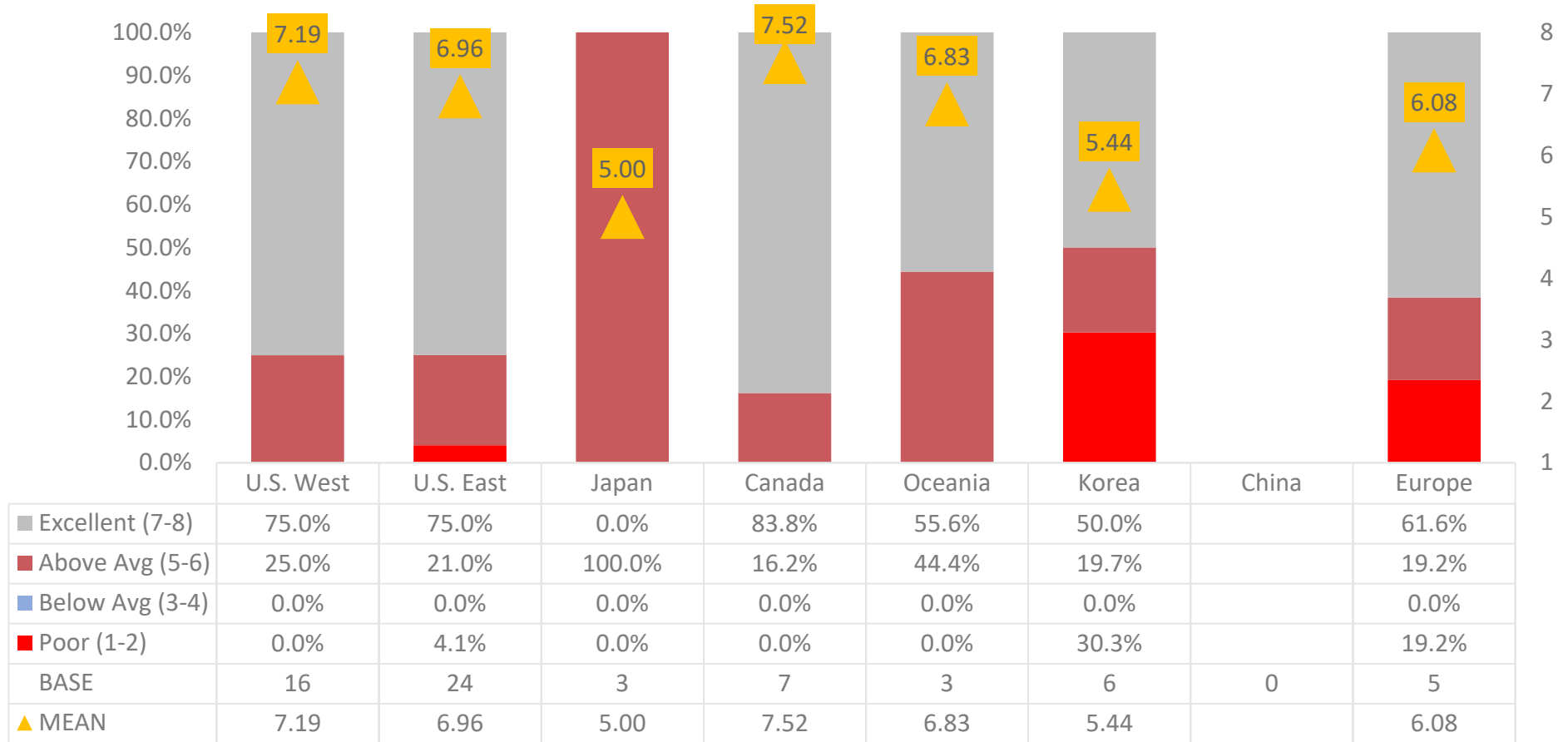
# OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



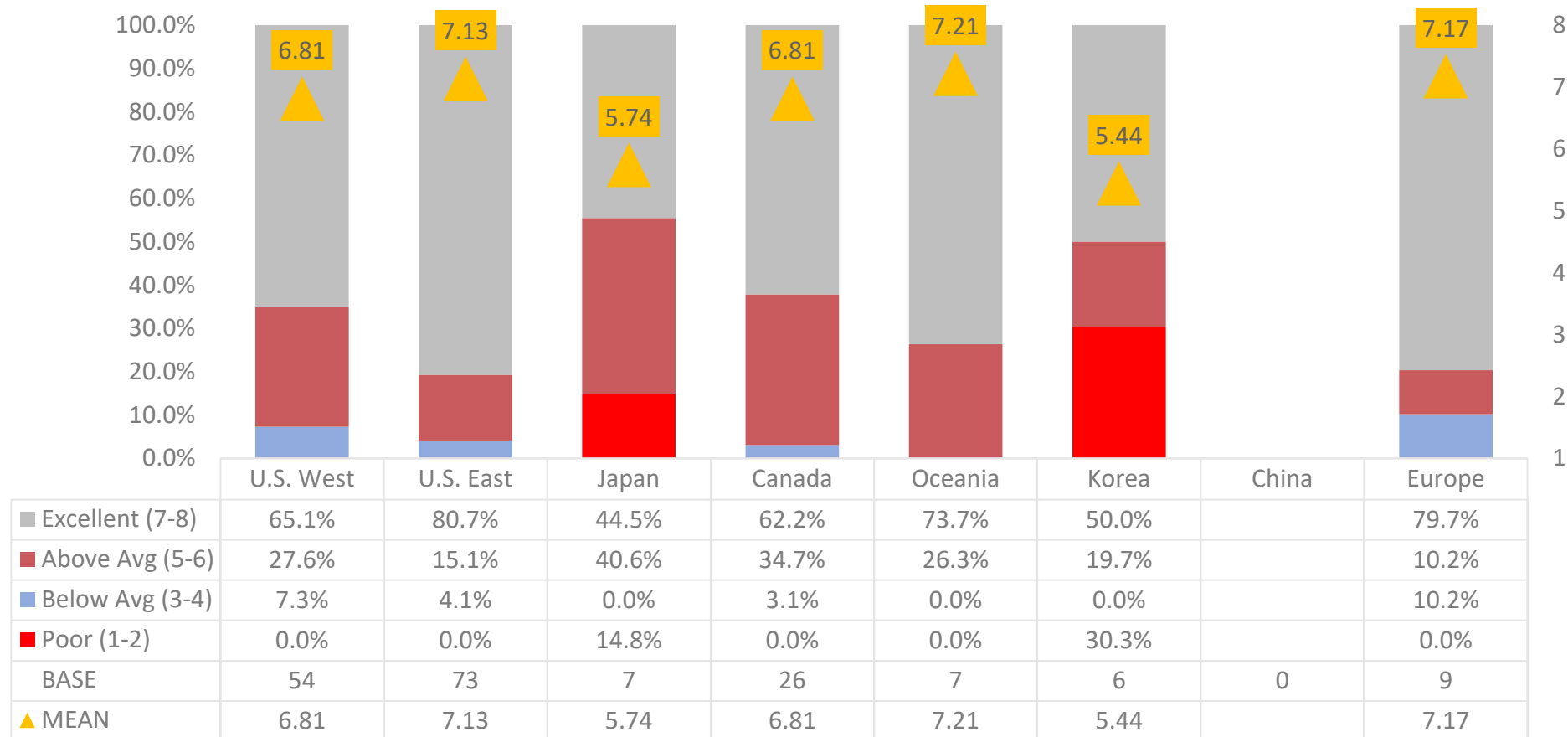
# OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



# OVERALL ACCESSIBILITY - HOTELS

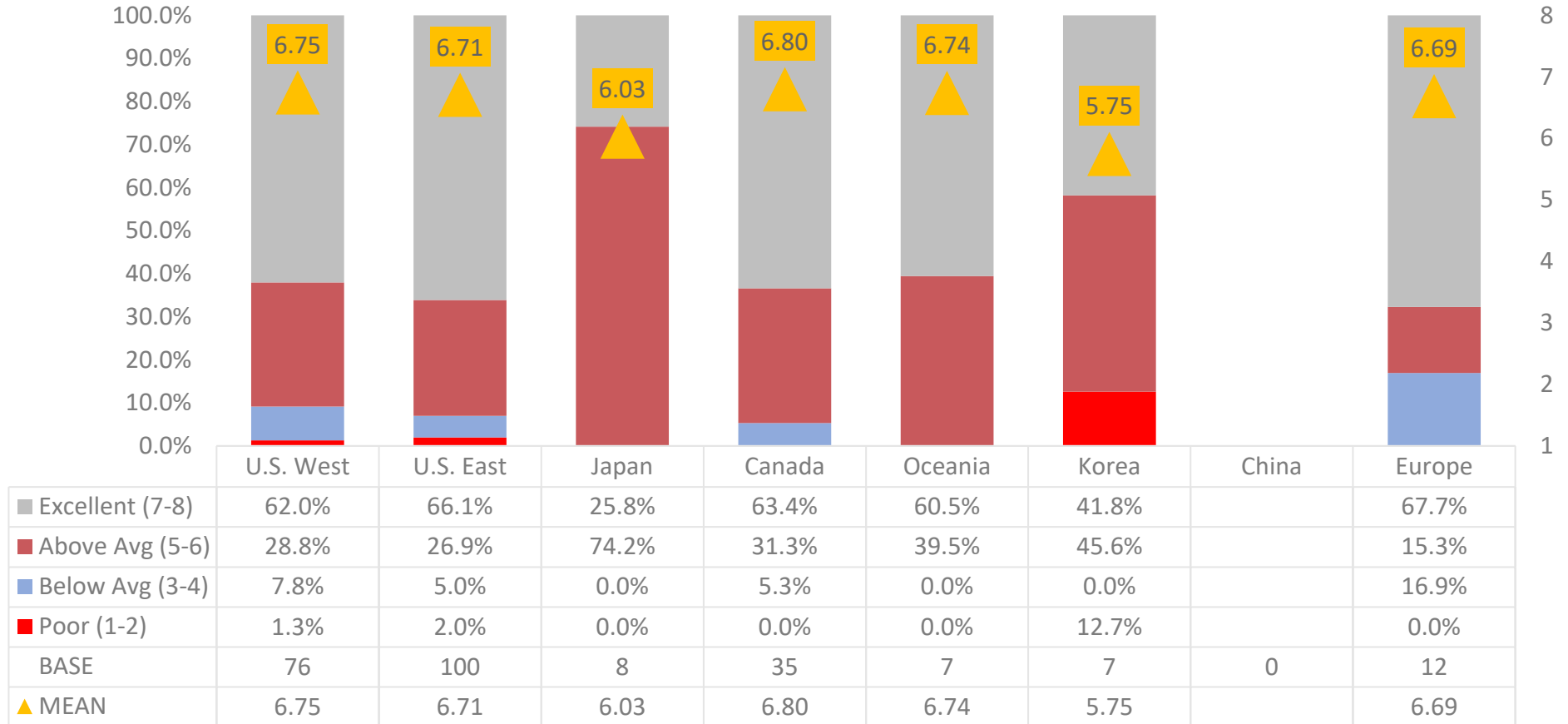
8-pt Rating Scale  
8=Excellent / 1=Poor





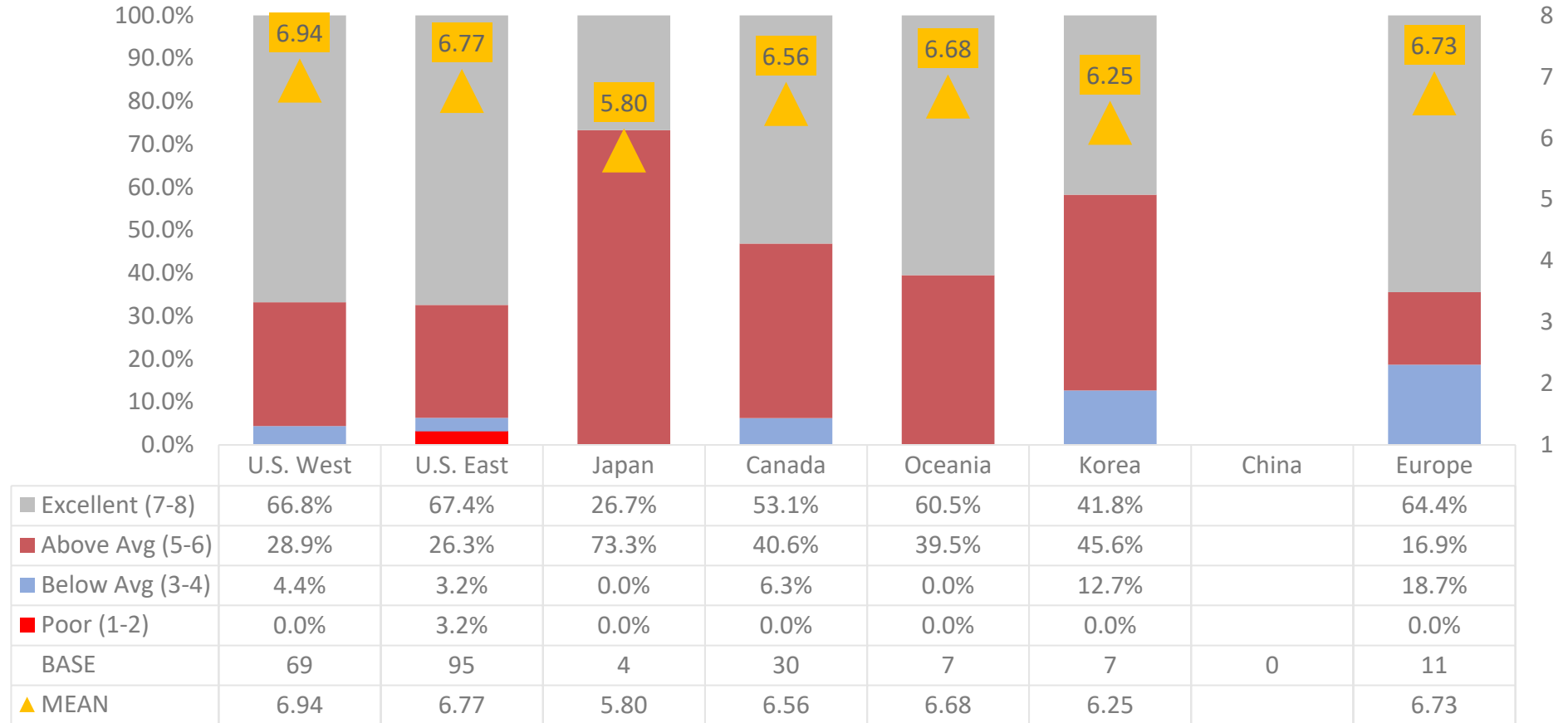
# OVERALL ACCESSIBILITY - RESTAURANTS

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



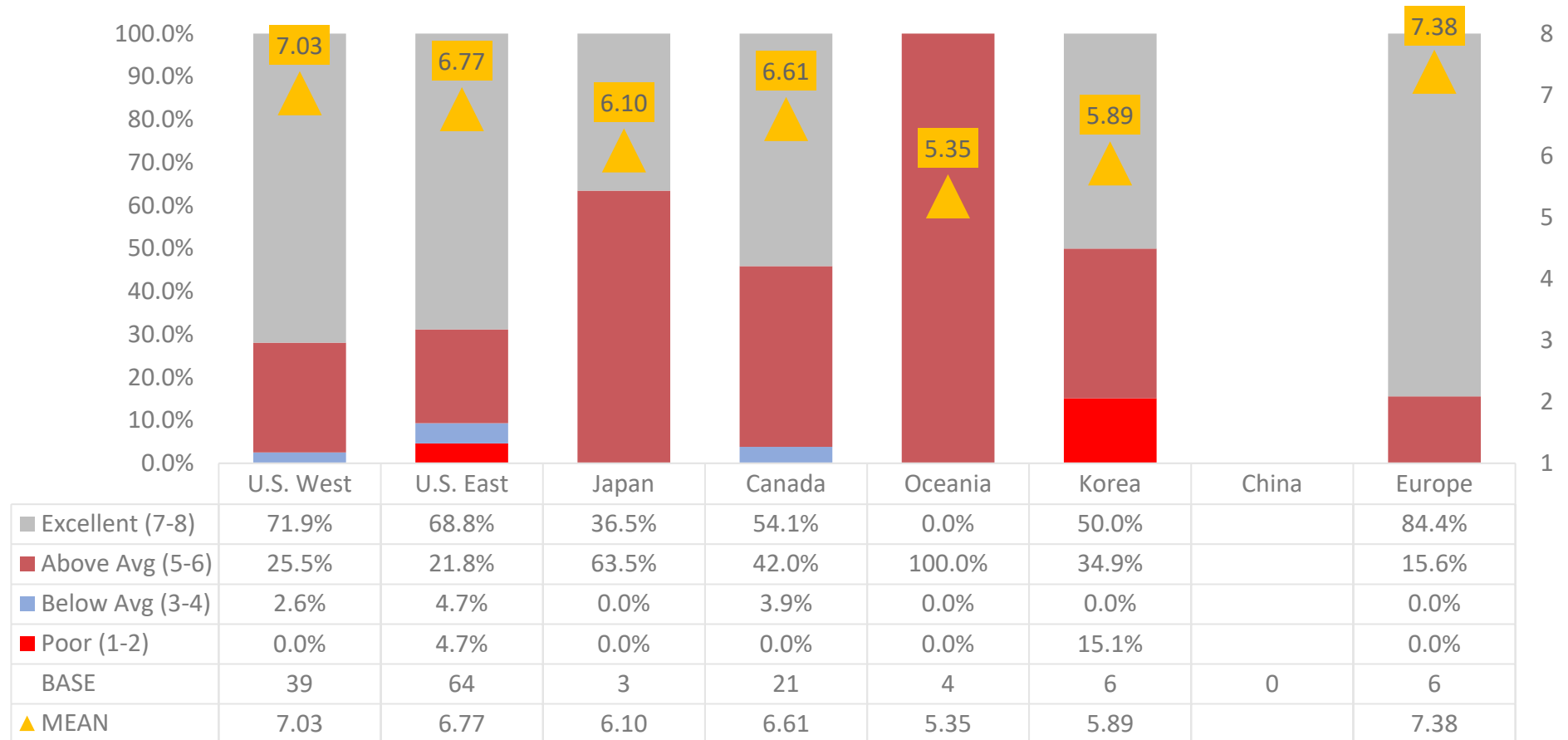
# OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



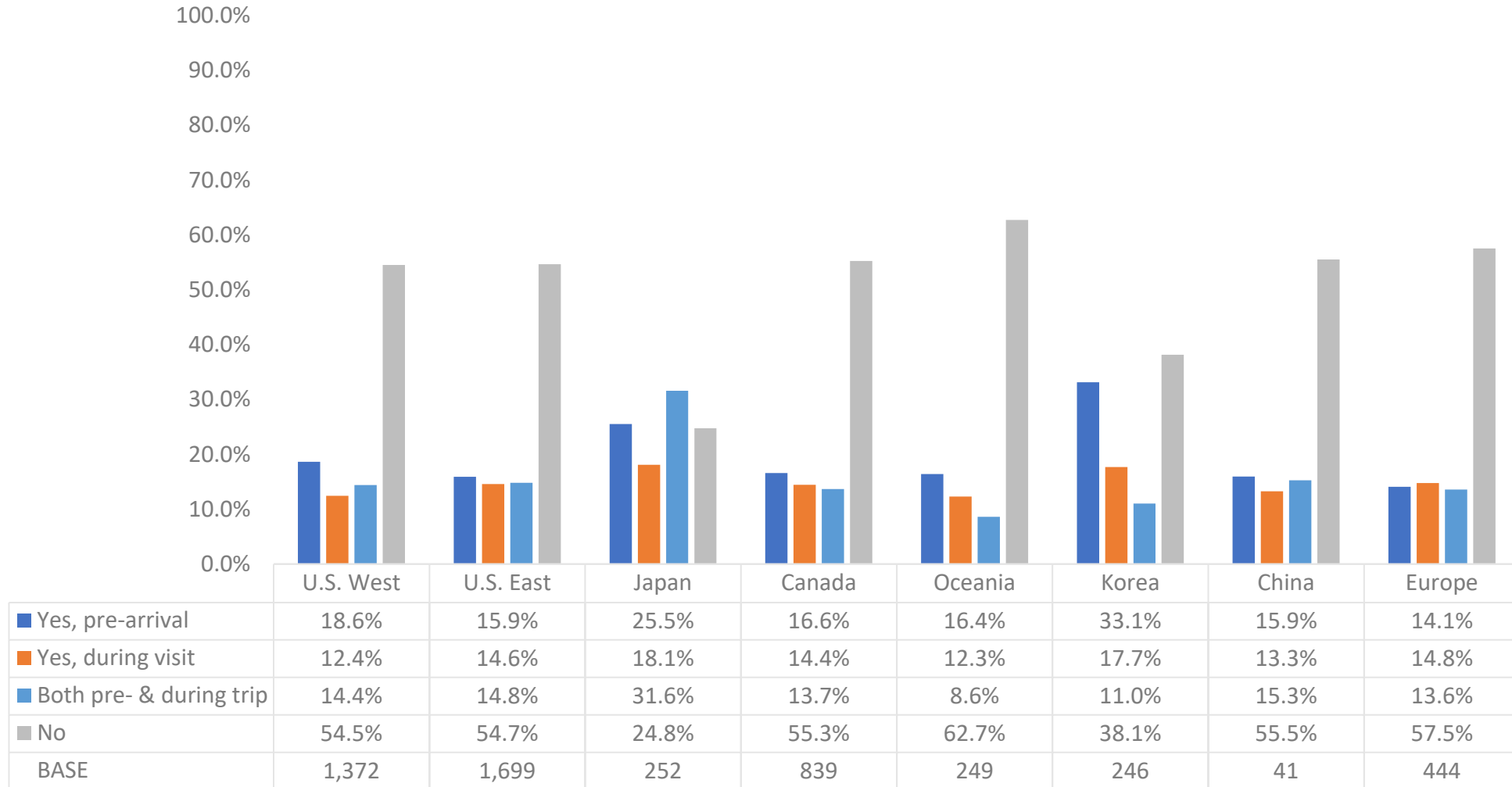
# OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

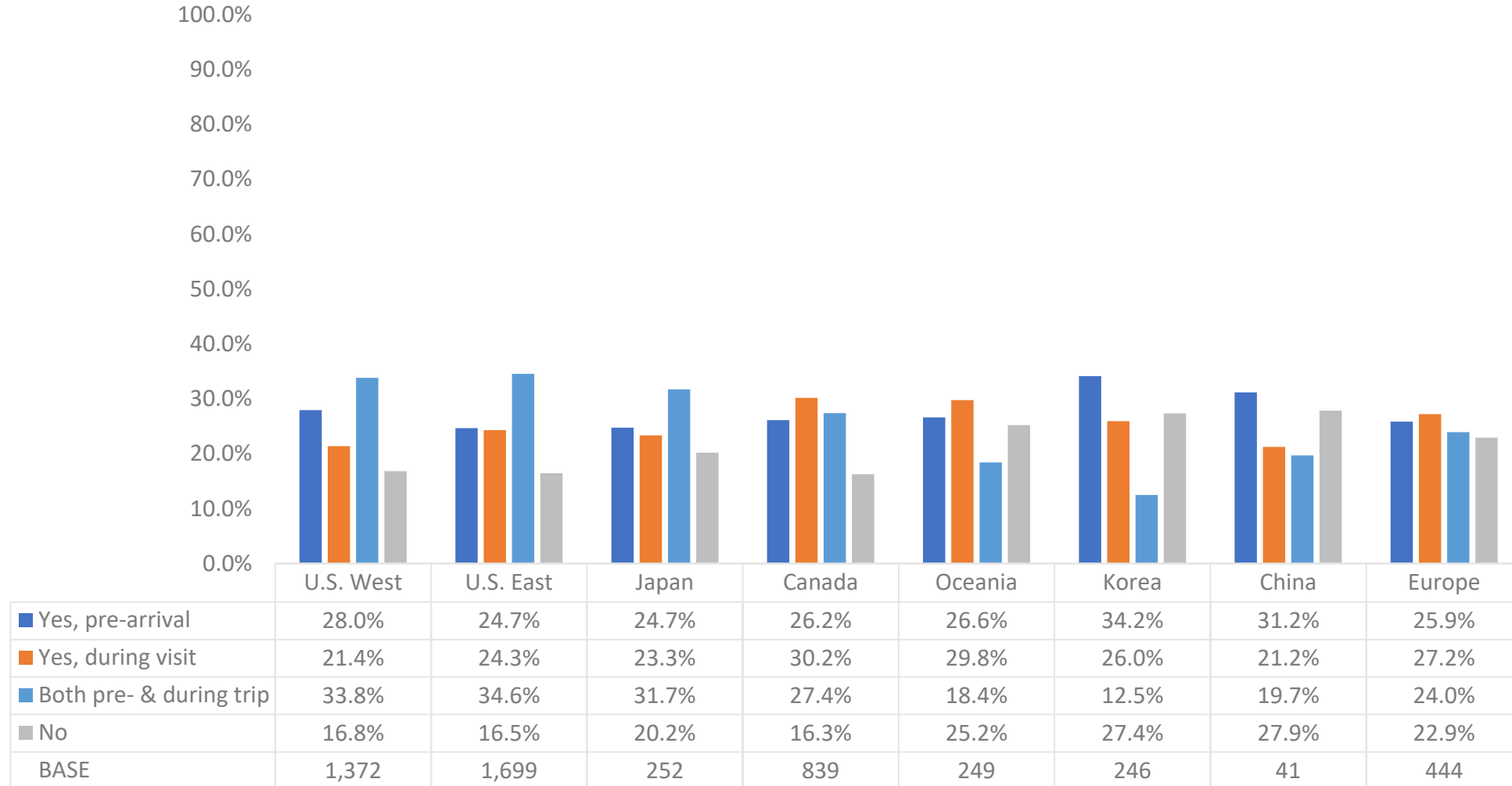


# Section 4 – Alternative Messaging

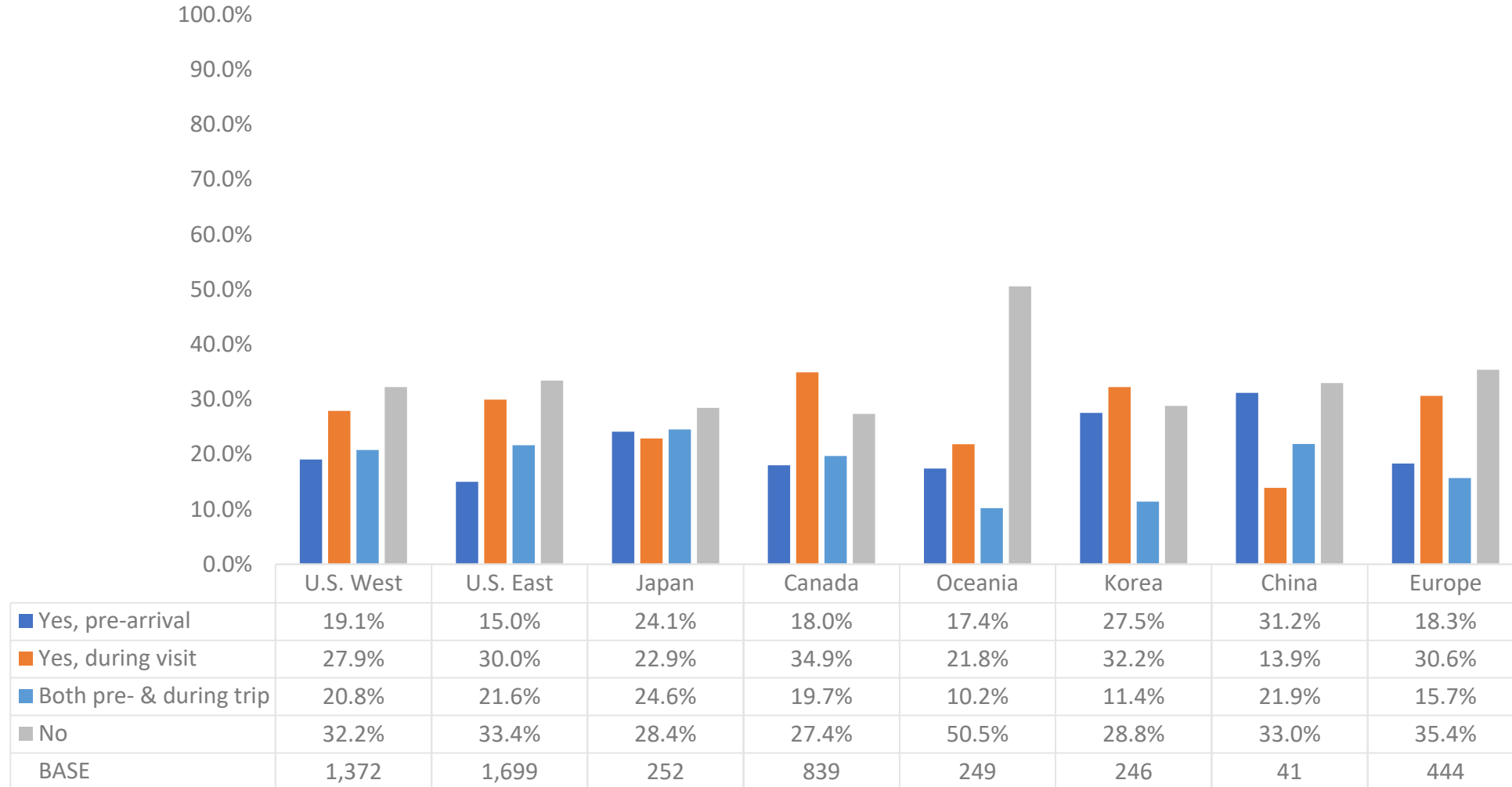
# SAFE AND RESPONSIBLE TRAVEL



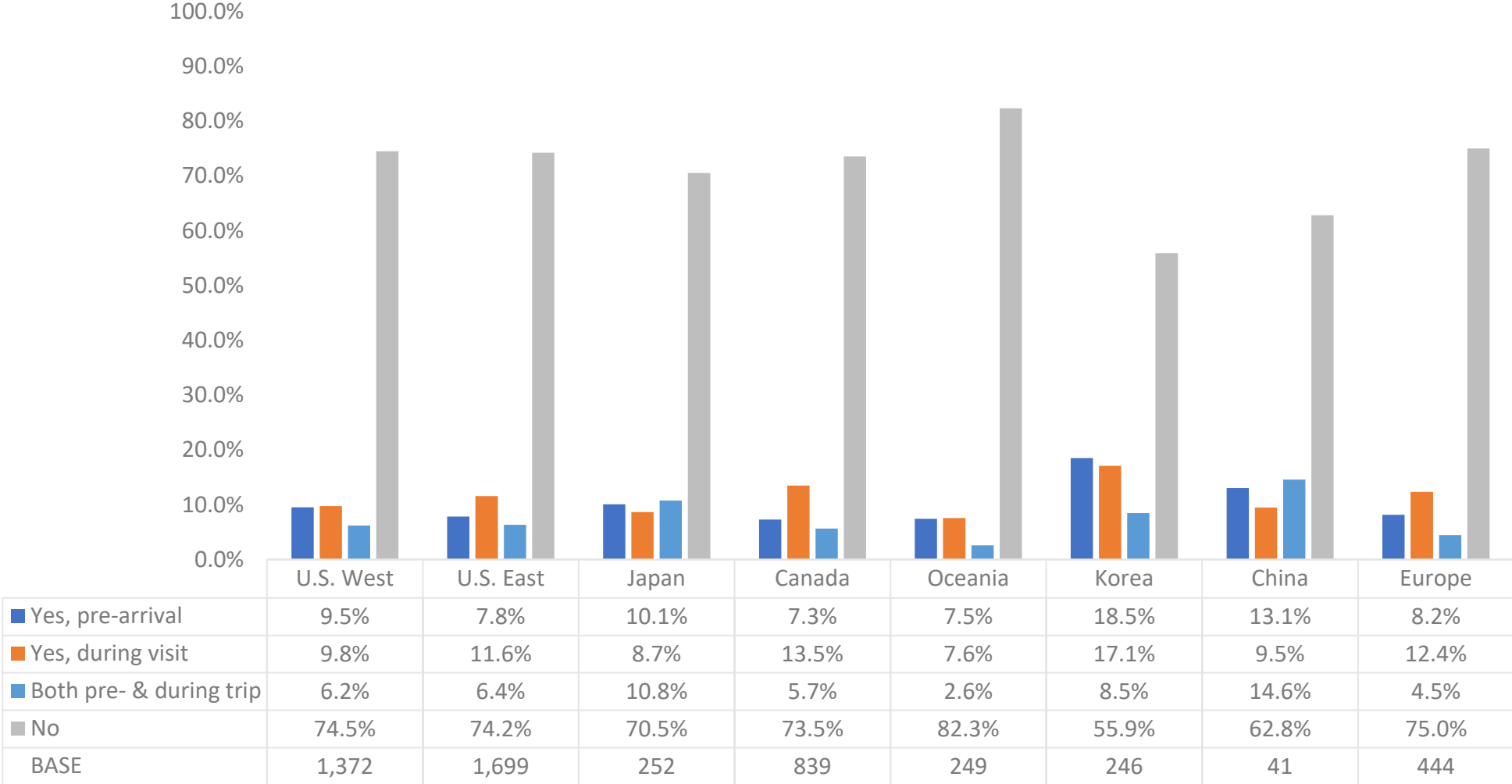
# CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



# OCEAN AND HIKING SAFETY

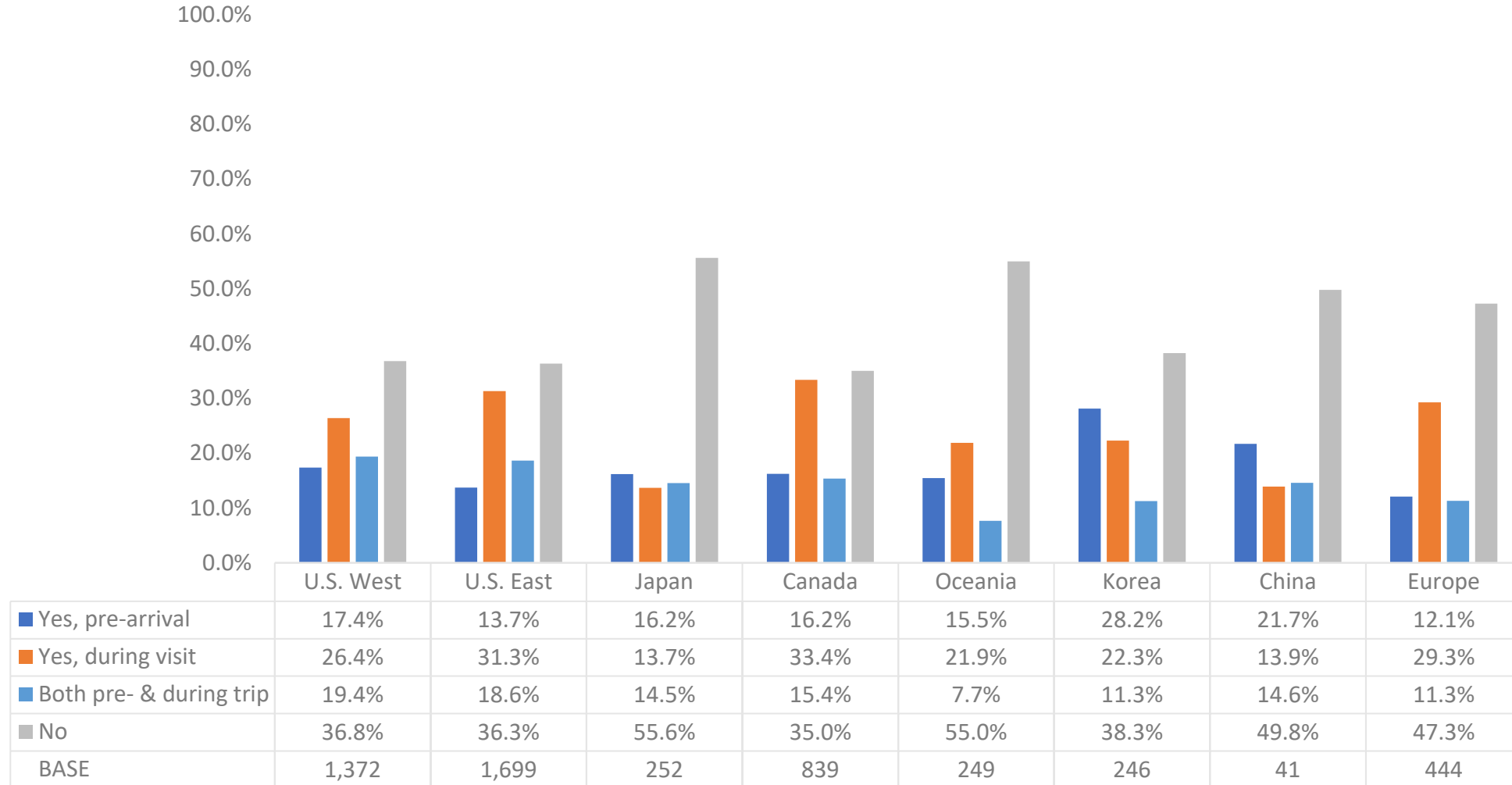


# VOLUNTEER / GIVE-BACK OPPORTUNITIES

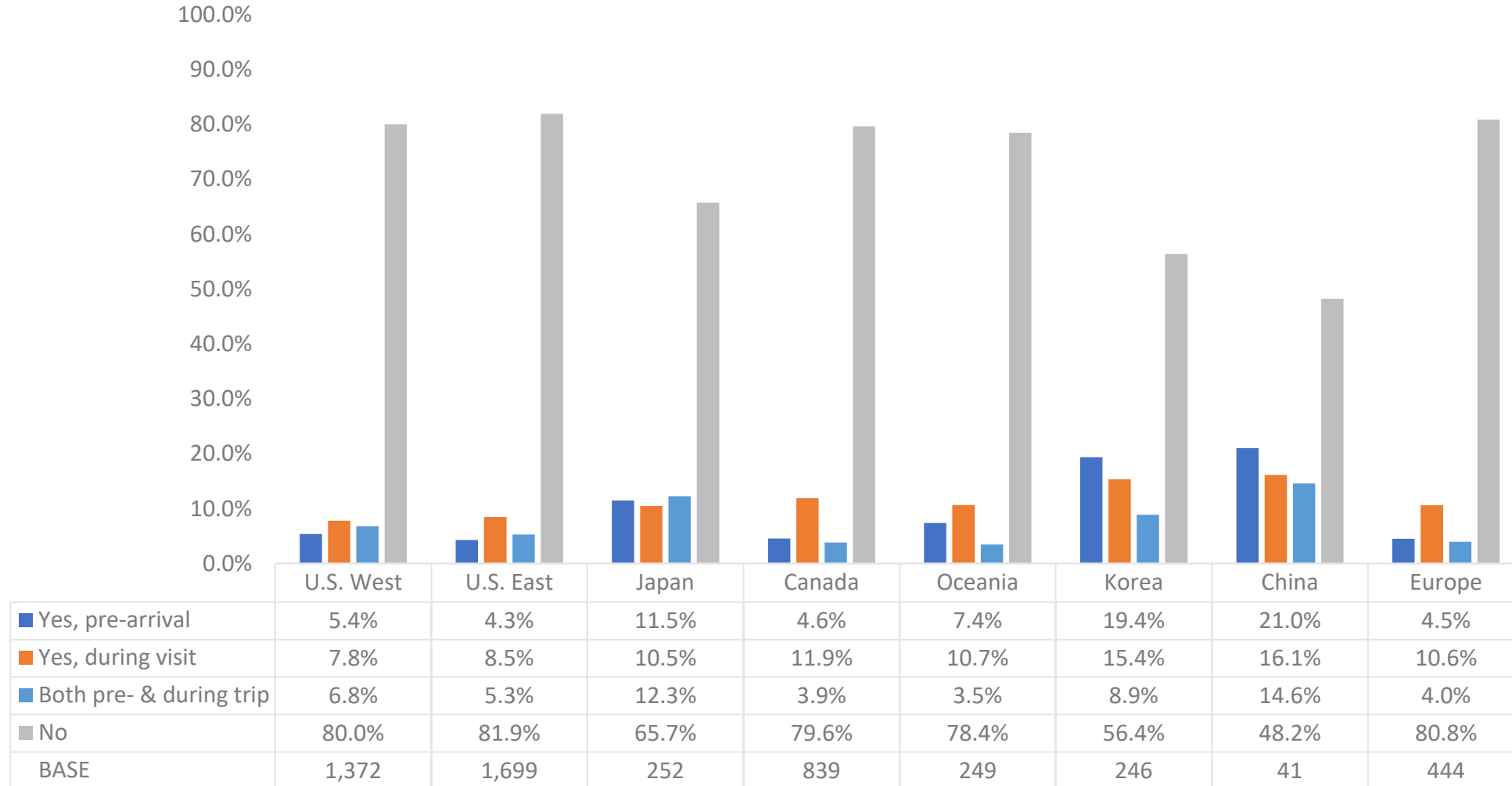




# SUPPORT LOCAL / SHOP LOCAL



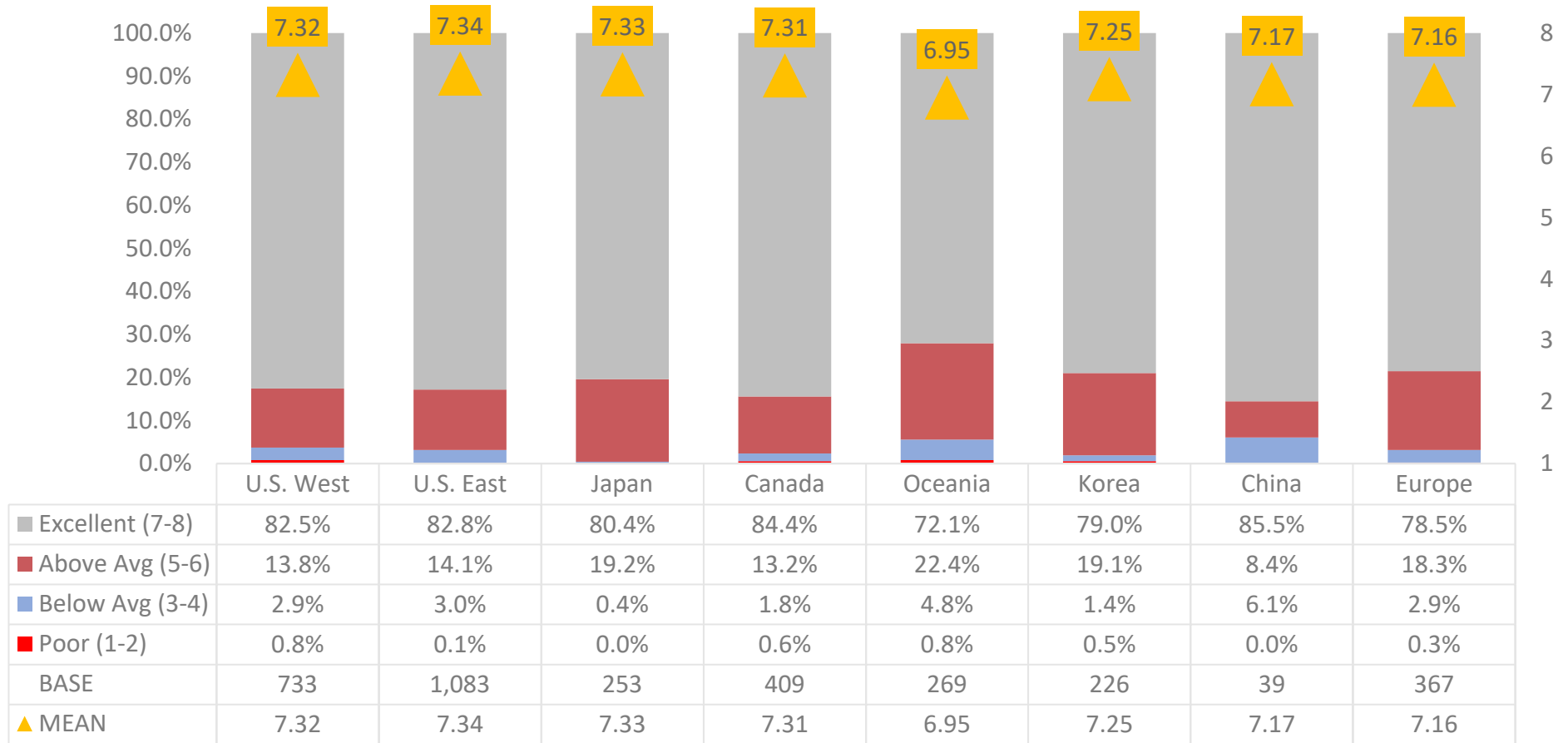
# MĀLAMA HAWAI‘I



# Section 5 – O‘ahu

# SATISFACTION - O'AHU

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



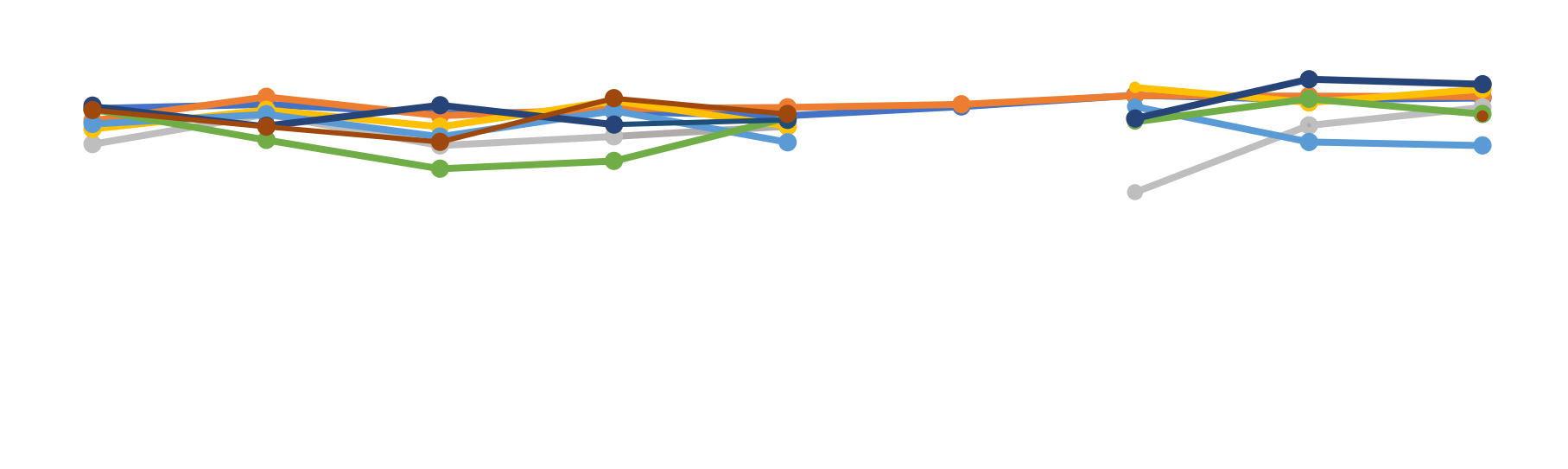
# SATISFACTION - O'AHU

- **Gender:** Females from **U.S. West** expressed higher levels of satisfaction compared to males from this market.
- **Age:** Younger visitors from the following visitor markets expressed higher degrees of satisfaction: **U.S. West** (18-34/ 35-49) and **Japan** (18-34).
- **Trips to Hawai'i:** First-time visitors to the state from **Japan** were more satisfied with their stay on O'ahu compared to repeat visitors.
- **Islands visited:** Visitors from **U.S. West, U.S. East** and **Japan** 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.
- **Education:** Visitors from **Japan** without a college degree were more satisfied with their stay than college graduates.

# SATISFACTION - O'AHU

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

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	80.2%	81.1%	79.1%	79.5%	78.6%	80.6%	83.1%	82.1%	82.5%
U.S. East	77.5%	82.7%	78.6%	80.1%	80.4%	81.1%	83.0%	82.9%	82.8%
Japan	72.4%	78.9%	72.1%	74.1%	76.3%		61.9%	76.5%	80.4%
Canada	75.7%	79.9%	76.2%	81.9%	76.3%		84.8%	81.5%	84.4%
Oceania	76.8%	78.9%	74.0%	79.7%	72.8%		80.6%	72.9%	72.1%
Korea	80.0%	73.3%	67.0%	68.7%	78.2%		77.3%	82.3%	79.0%
China	80.8%	76.4%	80.9%	76.7%	77.7%		78.0%	86.6%	85.5%
Europe	79.8%	76.2%	72.9%	82.4%	79.0%				78.5%

P= Preliminary Data

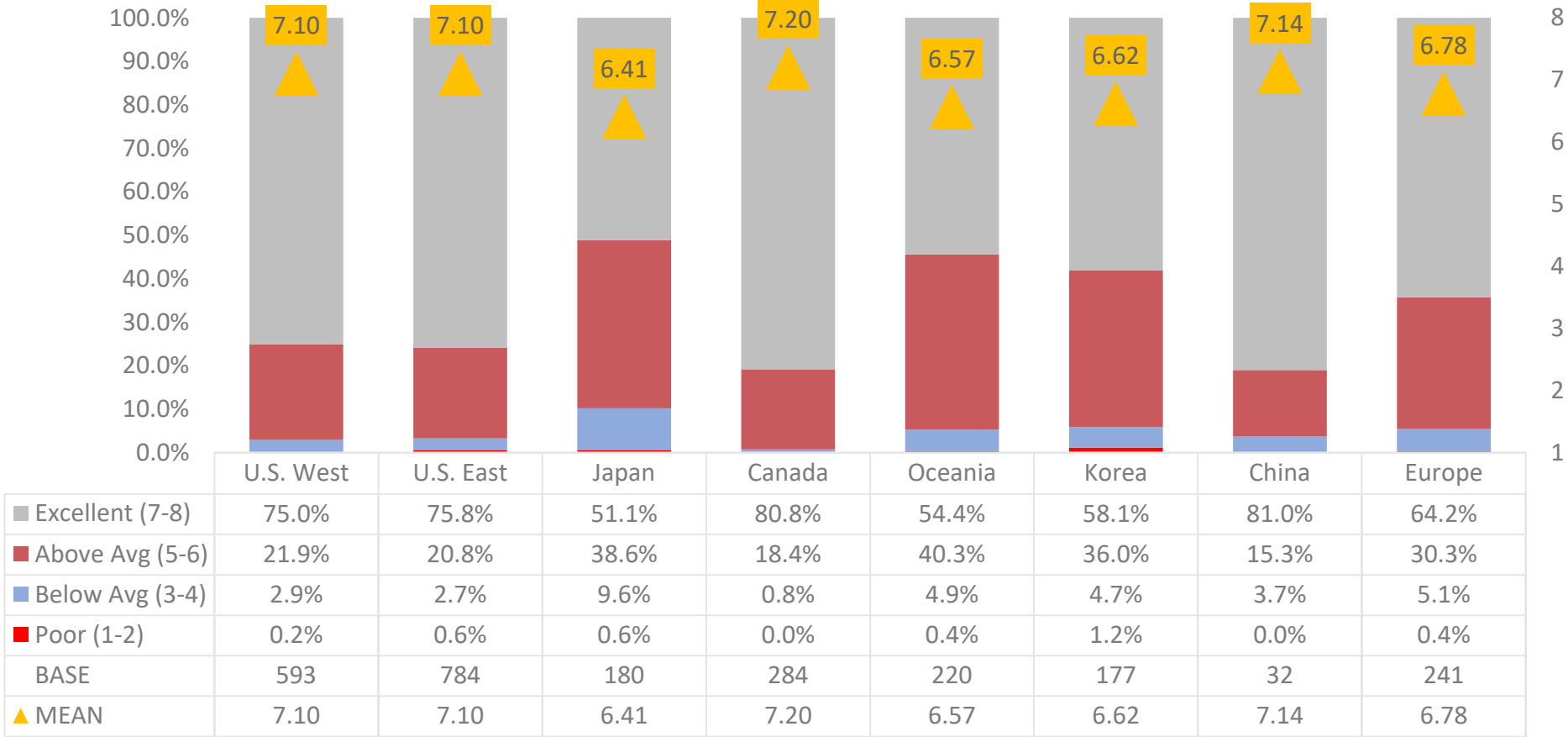
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



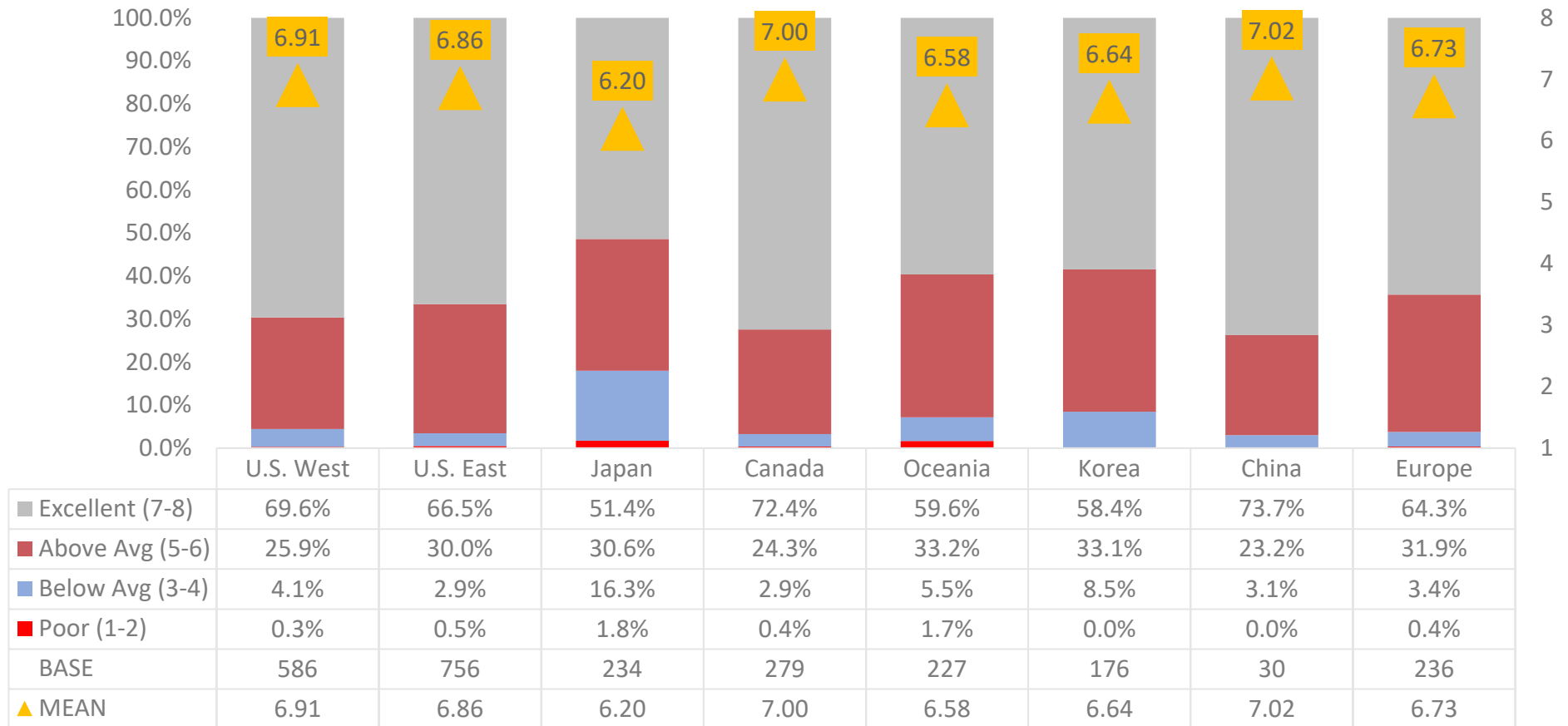
# ENTERTAINMENT/ ATTRACTIONS - O'AHU

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



# SHOPPING - O‘AHU

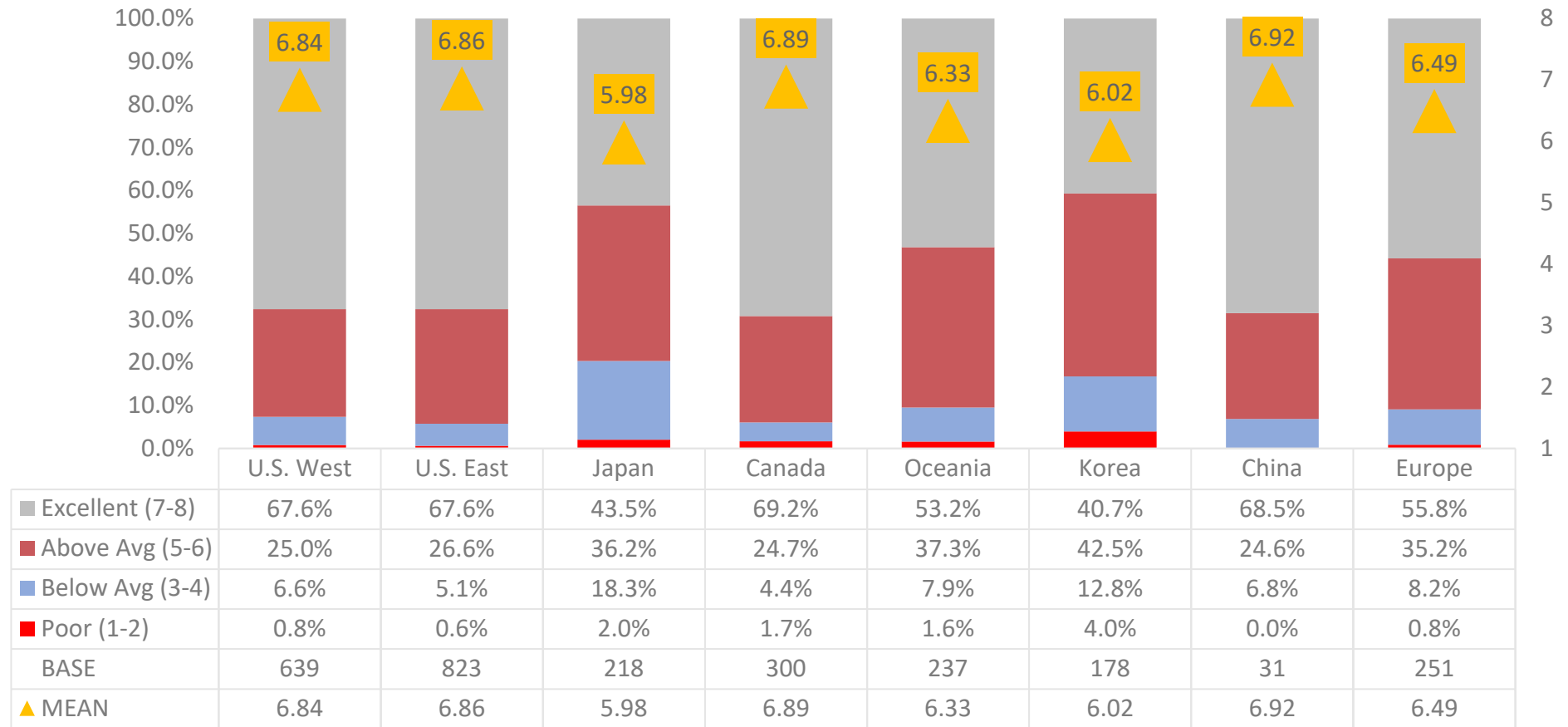
8-pt Rating Scale  
8 = Excellent / 1 = Poor





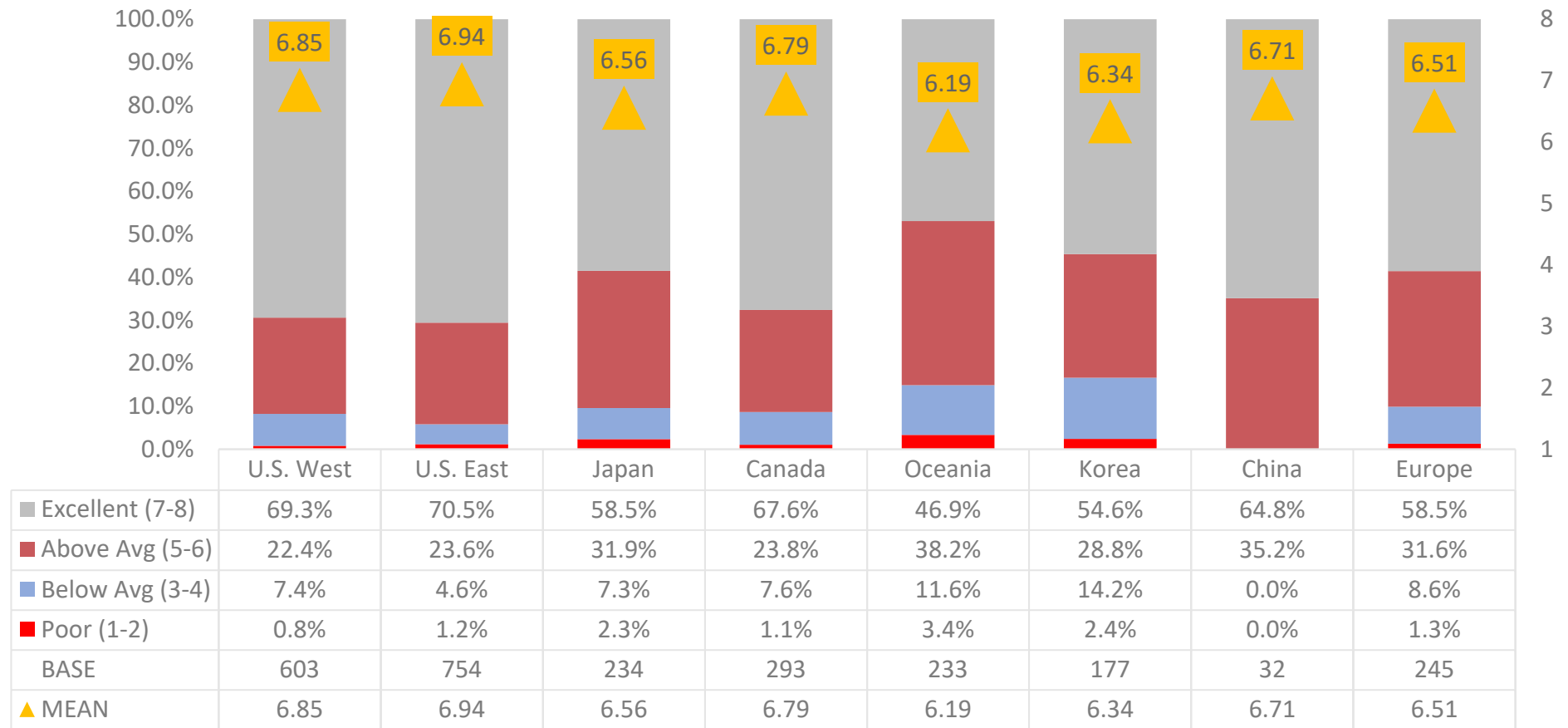
# DINING/ FOOD & BEVERAGES - O'AHU

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



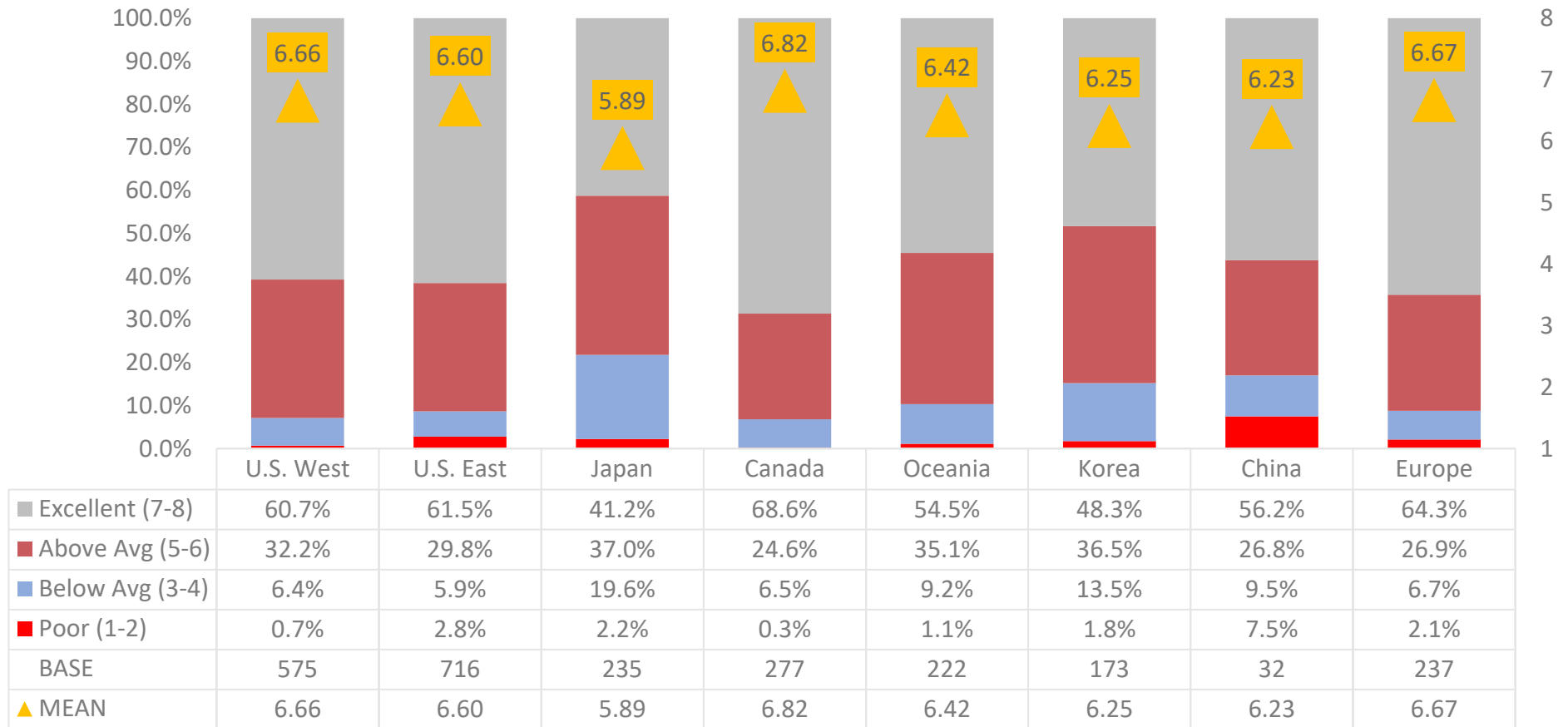
# LODGING/ ACOMMODATIONS - O‘AHU

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



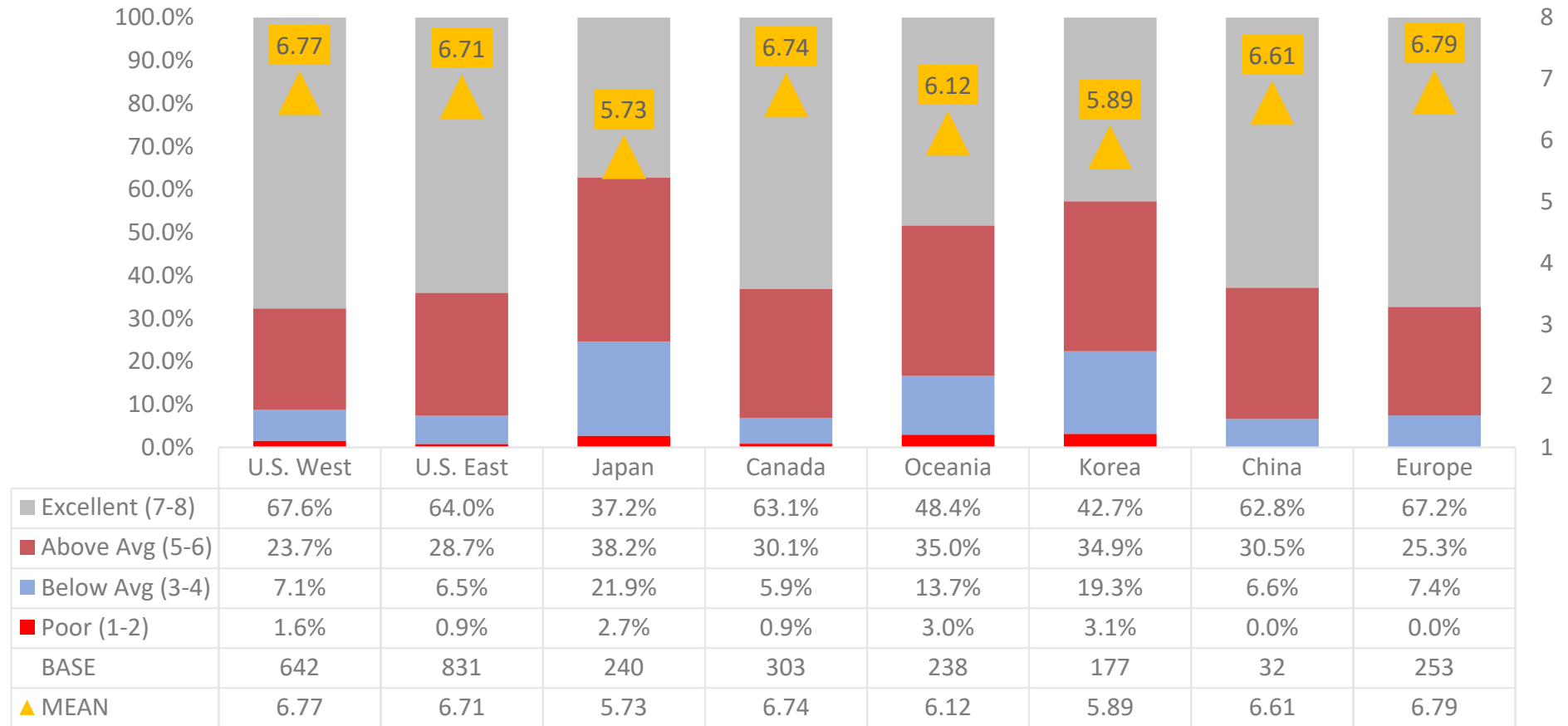
# TRANSPORTATION ON ISLAND - O‘AHU

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



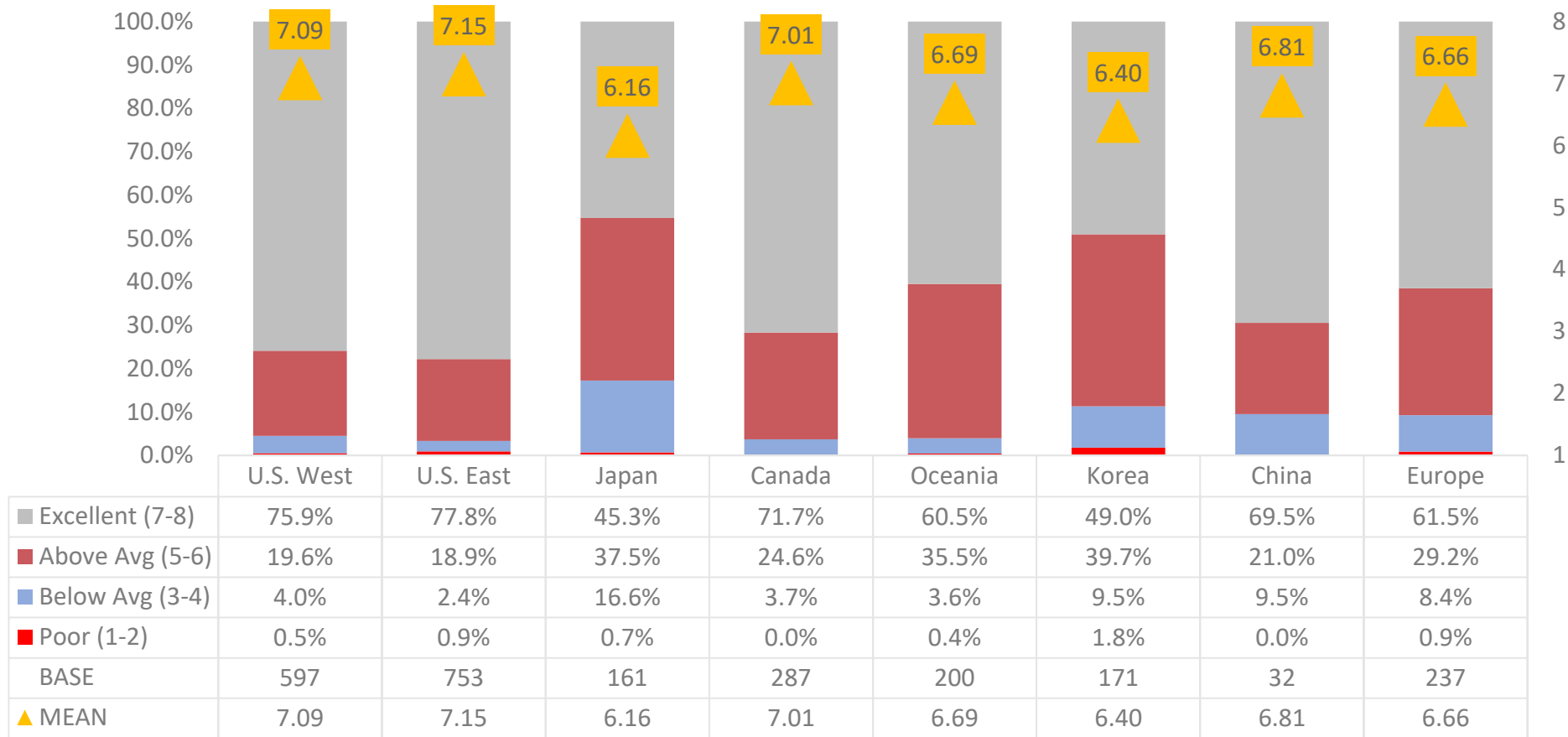
# AIRPORT - O'AHU

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



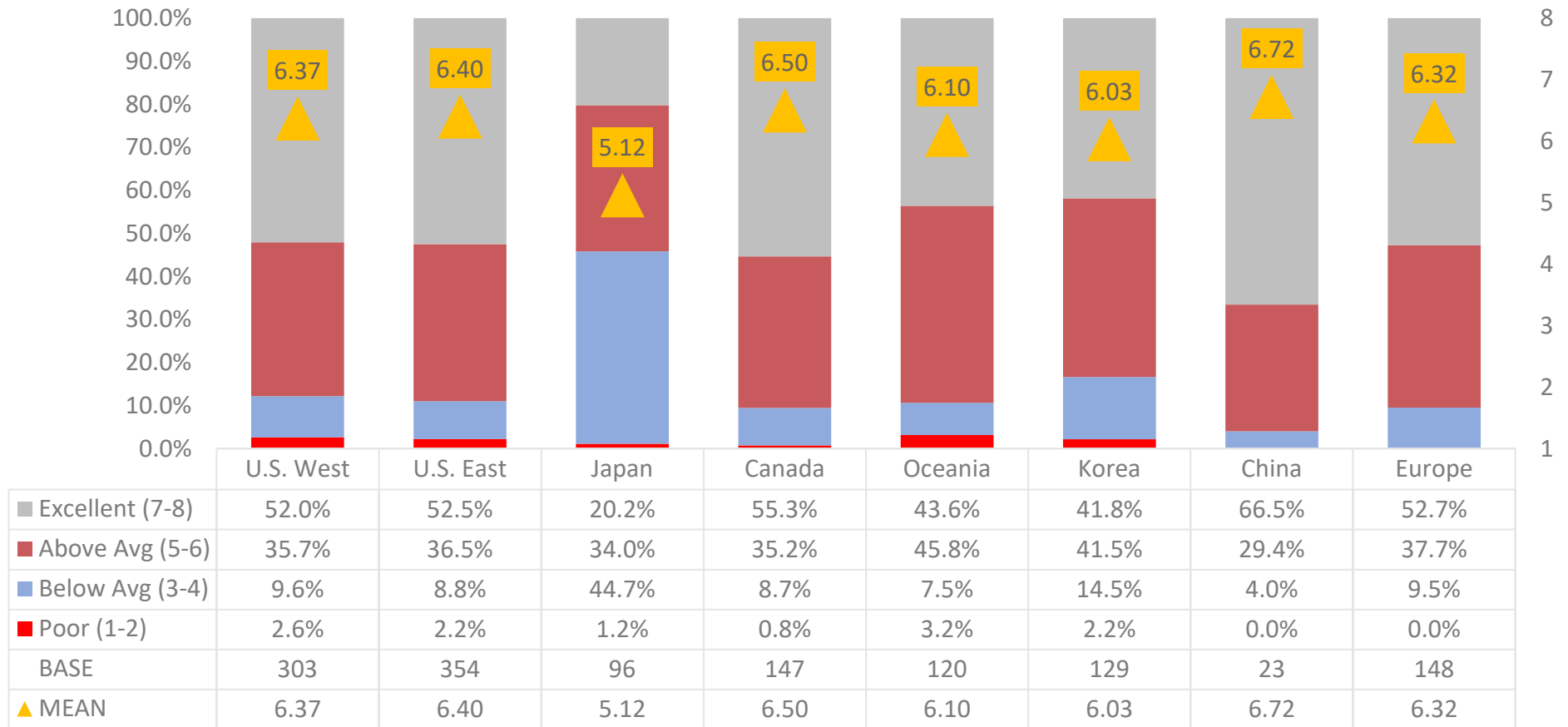
# CULTURAL EXPERIENCES - O'AHU

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



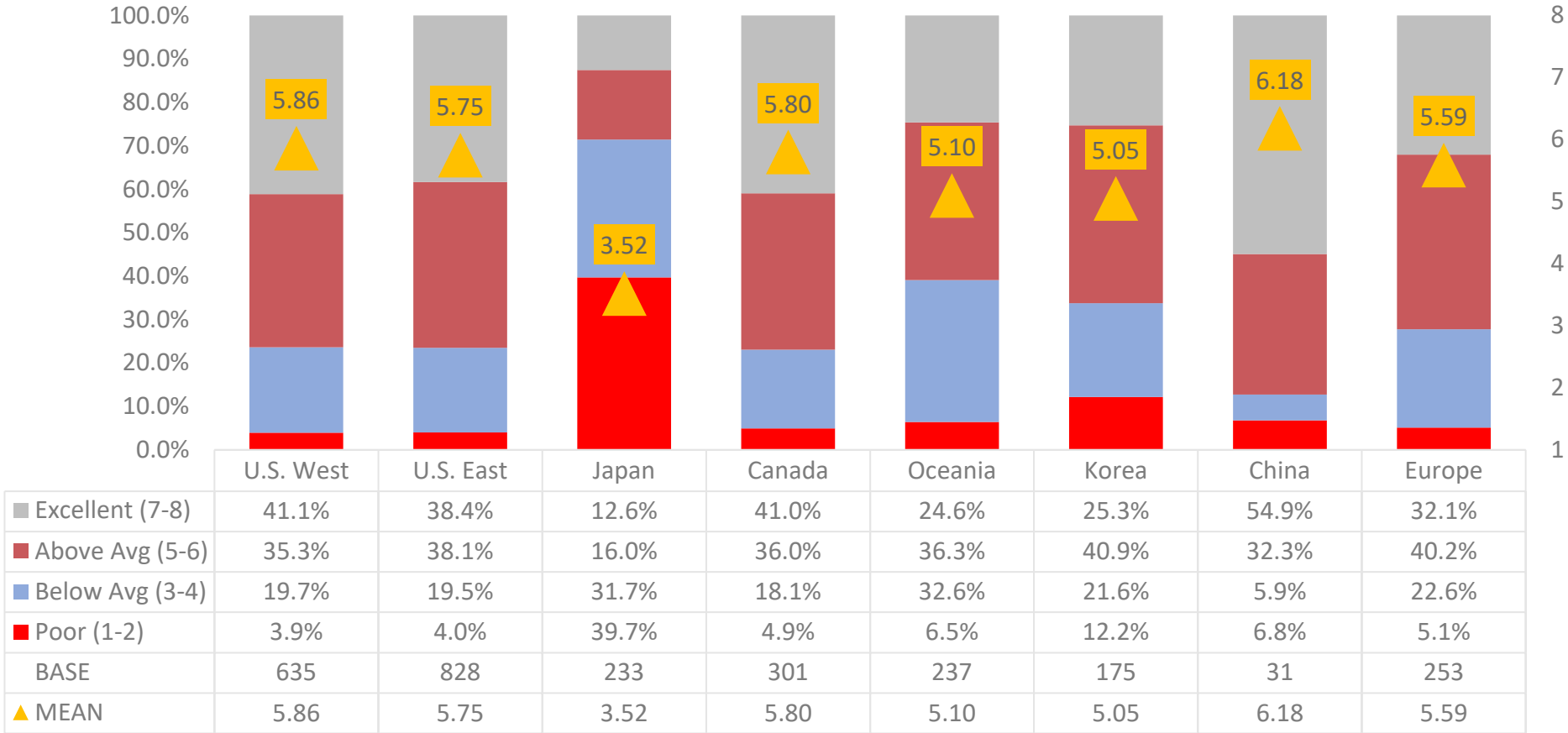
# VOLUNTEER EXPERIENCES - O'AHU

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



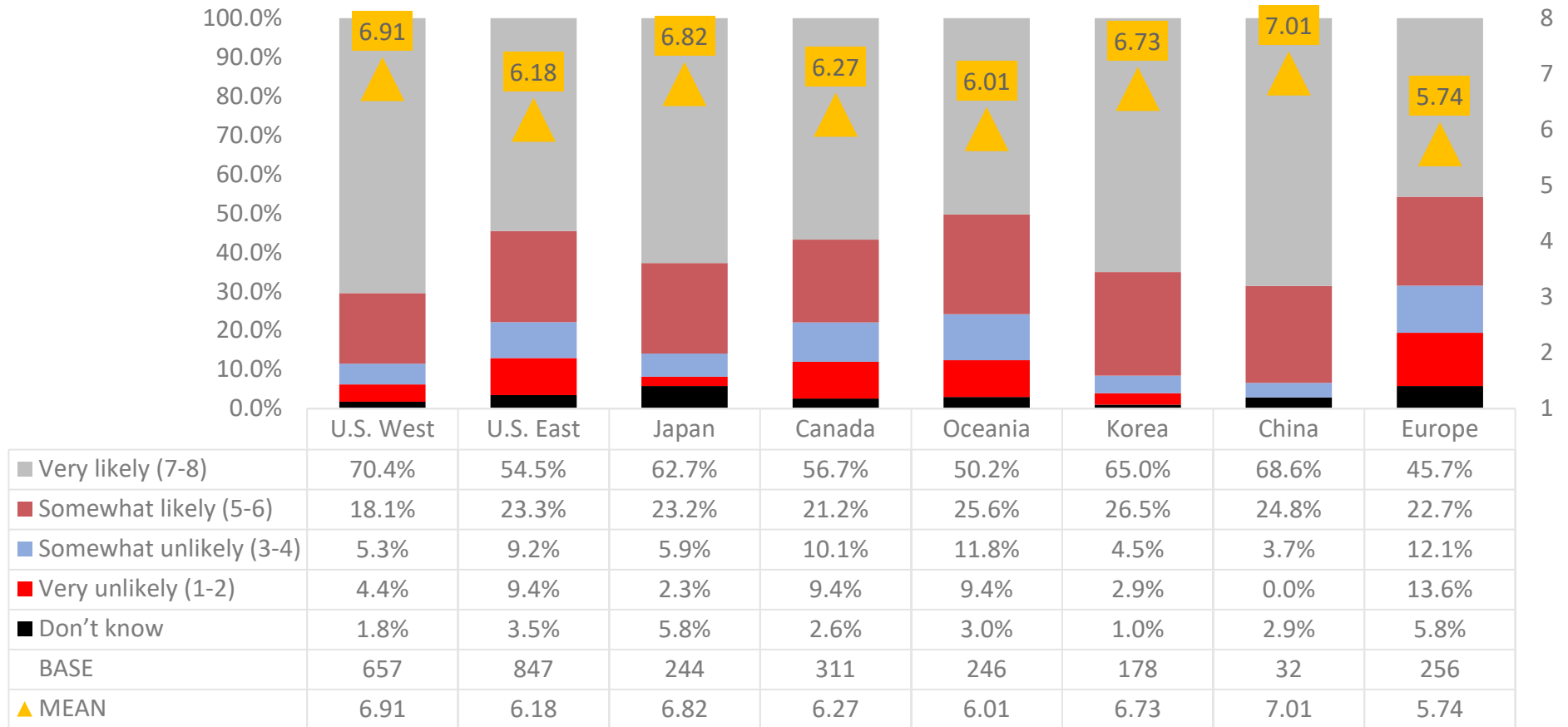
# OVERALL VALUE FOR THE MONEY - O'AHU

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



# LIKELIHOOD OF RETURN VISIT - O‘AHU

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

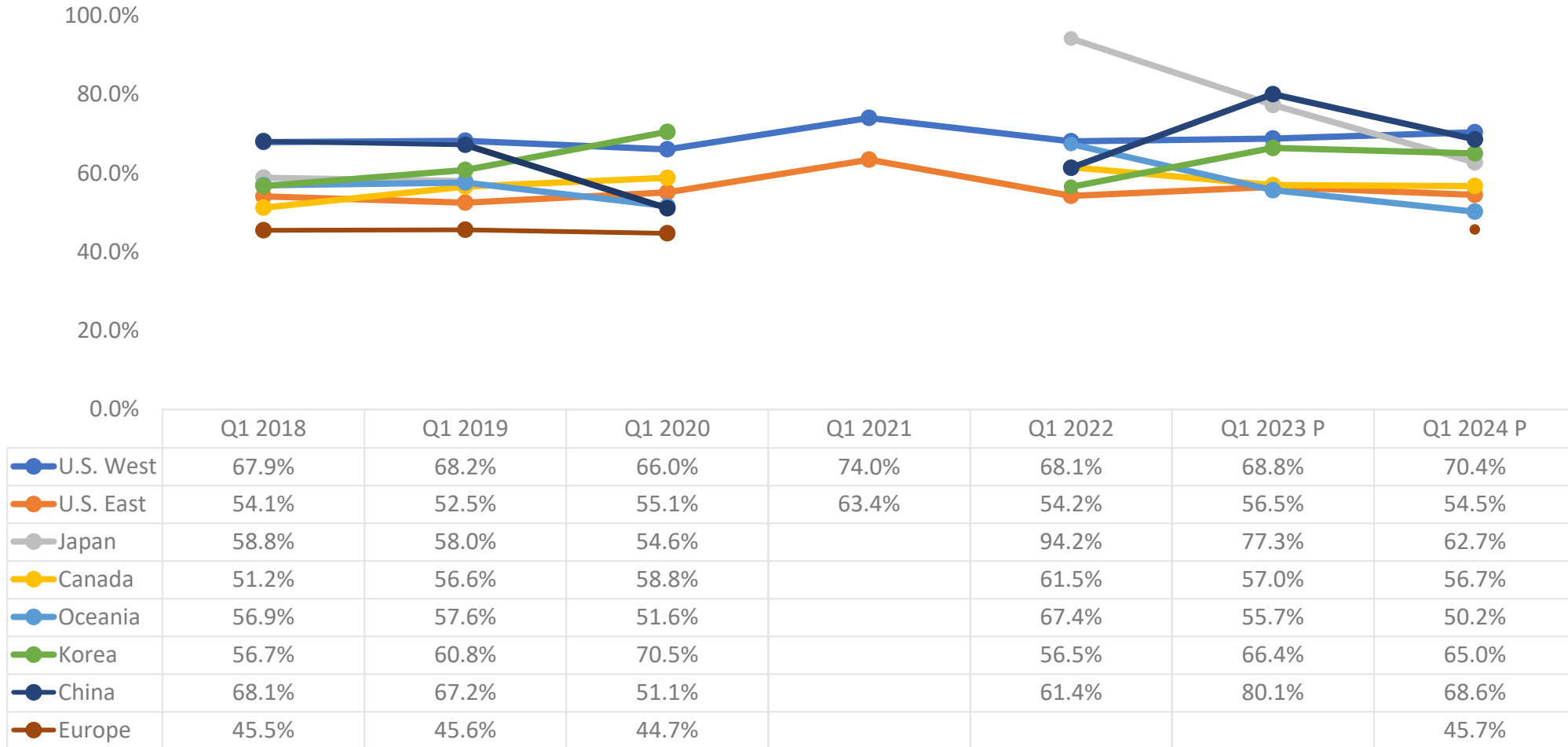




# LIKELIHOOD OF RETURN VISIT - O'AHU

TOP BOX - VERY LIKELY (7-8)

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



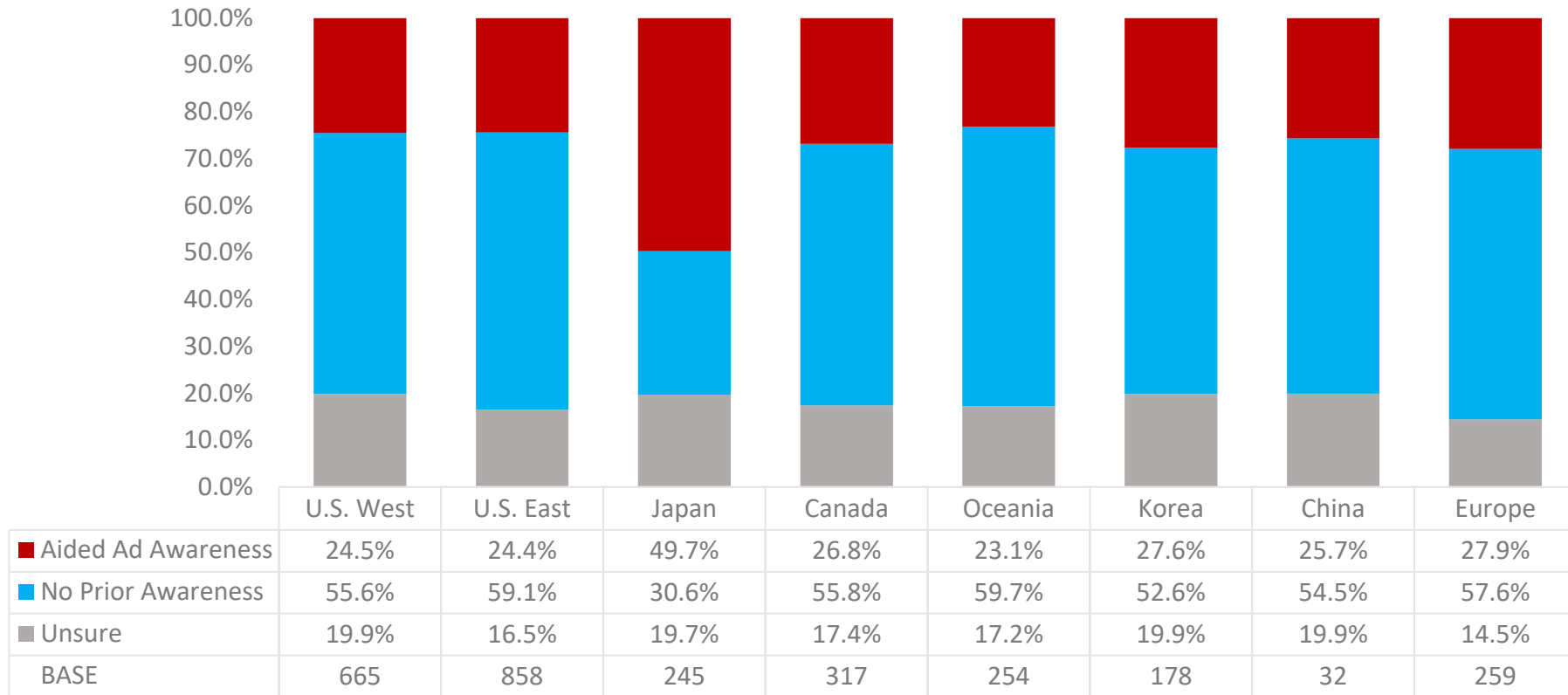
P= Preliminary Data

Q. How likely are you to visit O'ahu again in the next five years?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



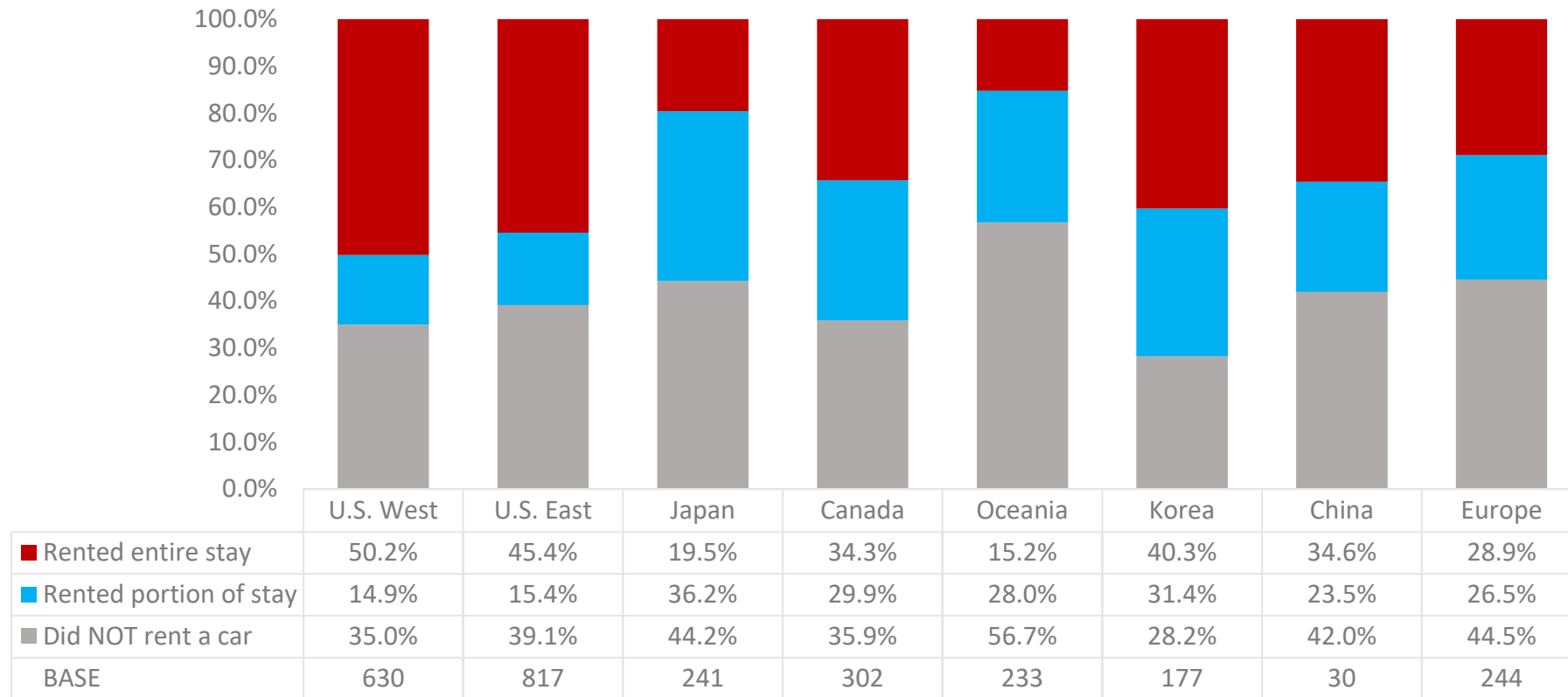
# AIDED ADVERTISING AWARENESS - O'AHU



# MOTIVATING FACTORS - O‘AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	39.6%	43.8%	38.4%	47.9%	46.6%	58.0%	61.1%	49.2%
<b>Hawaiian cultural events</b>	15.6%	12.5%	15.2%	18.1%	9.3%	2.4%	9.5%	16.0%
<b>Outdoor or sporting activities and events</b>	13.2%	11.9%	8.0%	20.7%	6.8%	10.7%	9.5%	12.7%
<b>Social media posts and videos</b>	10.9%	10.5%	31.3%	15.0%	12.6%	19.0%	21.9%	16.7%
<b>Hawaiian music</b>	6.8%	5.6%	15.5%	9.6%	6.1%	1.6%	2.9%	8.7%
<b>Television programs or movies filmed in Hawai‘i</b>	7.4%	9.0%	40.8%	15.3%	17.7%	14.0%	15.3%	22.3%
<b>BASE</b>	661	855	244	317	250	178	32	258

# CAR RENTAL - O'AHU



# REASONS FOR PARTIAL RENTAL CAR - O‘AHU

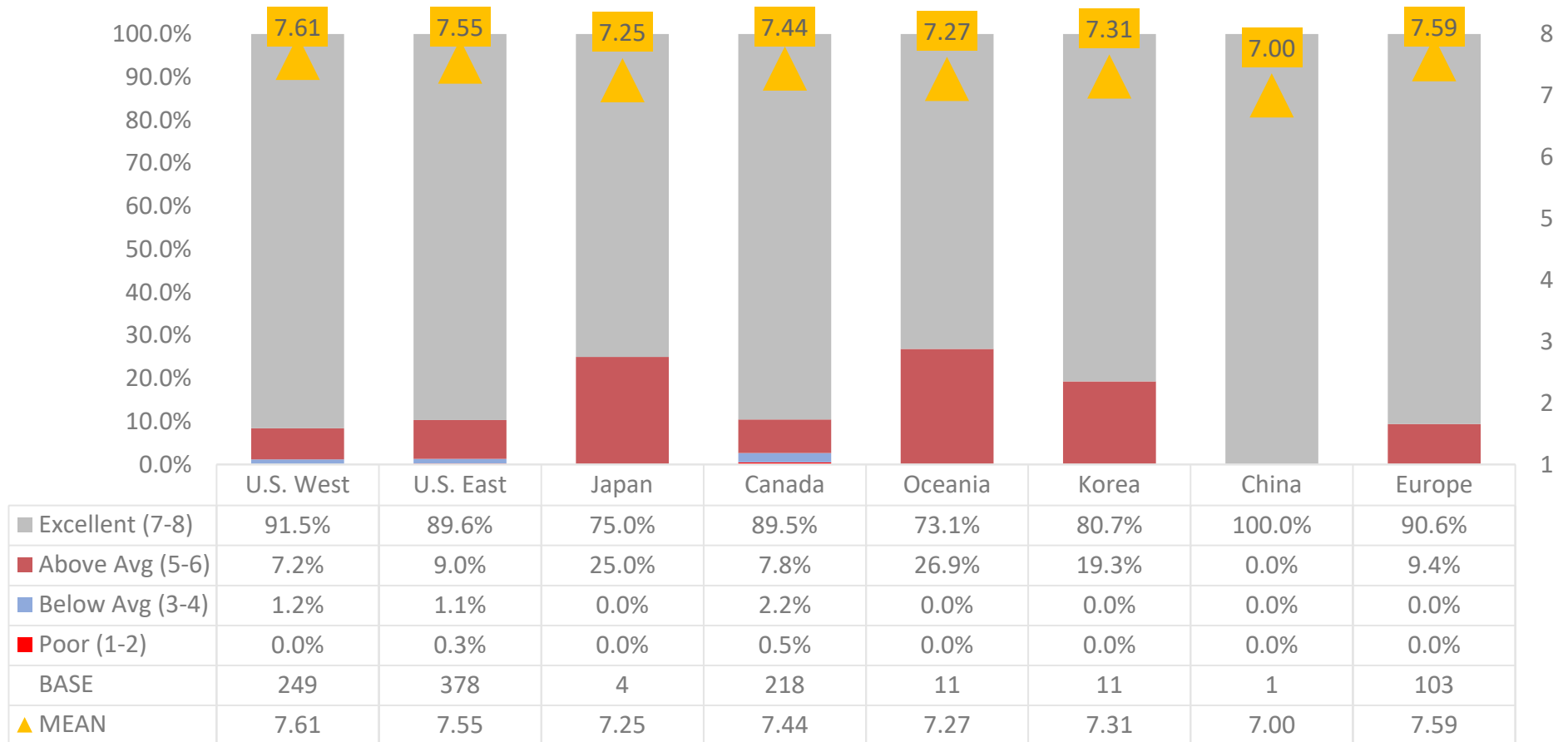
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>I only needed a vehicle on certain dates</b>	71.0%	79.2%	82.1%	73.7%	74.5%	61.3%	69.7%	70.4%
<b>Parking was too expensive at my hotel/ lodging</b>	47.4%	38.6%	7.8%	49.9%	27.8%	45.3%	13.2%	31.6%
<b>Car rental rates were too expensive</b>	20.4%	16.1%	19.2%	30.0%	21.5%	27.2%	13.2%	19.5%
<b>Wanted to reduce my carbon footprint</b>	19.2%	8.8%	0.9%	4.4%	8.9%	6.7%	17.1%	12.2%
<b>Vehicles were not available for all of my trip dates</b>	1.1%	1.6%	1.3%	3.1%	8.1%	7.7%	0.0%	2.9%
<b>BASE</b>	93	124	87	89	63	57	7	65



# Section 6 – Kaua‘i

# SATISFACTION - KAUA'I

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



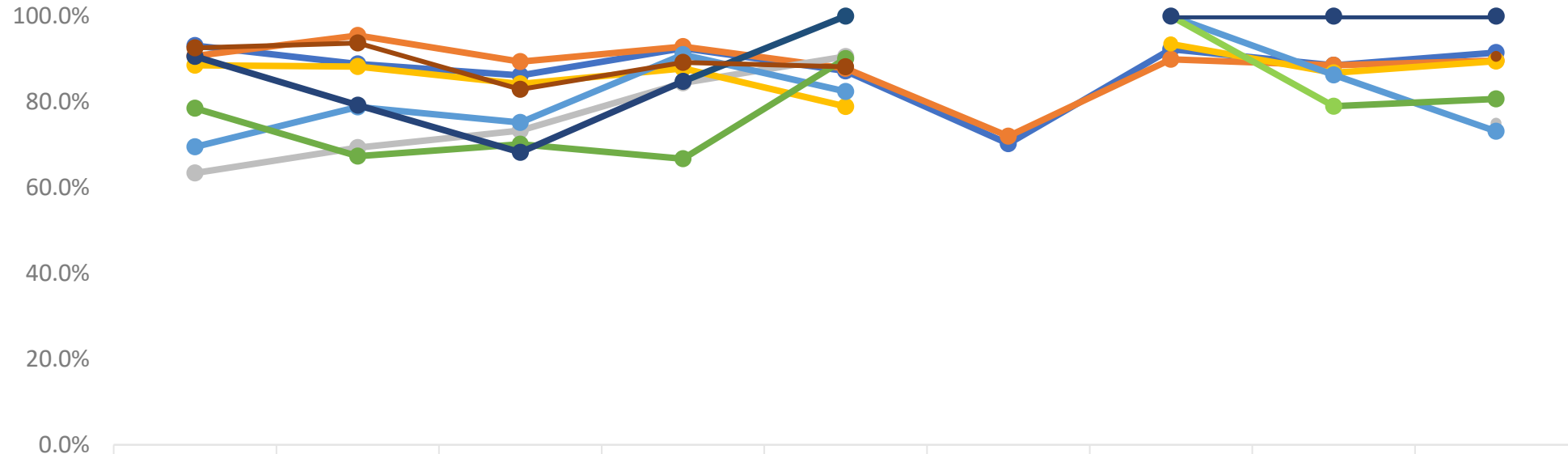
# SATISFACTION - KAUA'I

- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only Kaua'i were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Age:** Visitors from **U.S. West** between the ages of 35-49 years old gave the highest satisfaction scores amongst the different age groups from this visitor market.
- **Education:** Visitors from **U.S. East** 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)



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	93.1%	88.8%	86.2%	92.5%	87.2%	70.2%	92.3%	88.5%	91.5%
U.S. East	90.7%	95.5%	89.4%	92.9%	87.8%	72.0%	89.9%	88.5%	89.6%
Japan	63.4%	69.3%	73.3%	84.4%	90.6%				75.0%
Canada	88.5%	88.2%	84.2%	87.8%	78.9%		93.5%	86.8%	89.5%
Oceania	69.5%	78.8%	75.2%	91.0%	82.4%		100.0%	86.3%	73.1%
Korea	78.5%	67.3%	70.1%	66.7%	90.1%		100.0%	79.0%	80.7%
China	90.6%	79.2%	68.2%	84.8%	100.0%		100.0%	100.0%	100.0%
Europe	92.6%	93.7%	82.9%	89.2%	88.1%				90.6%

P= Preliminary Data

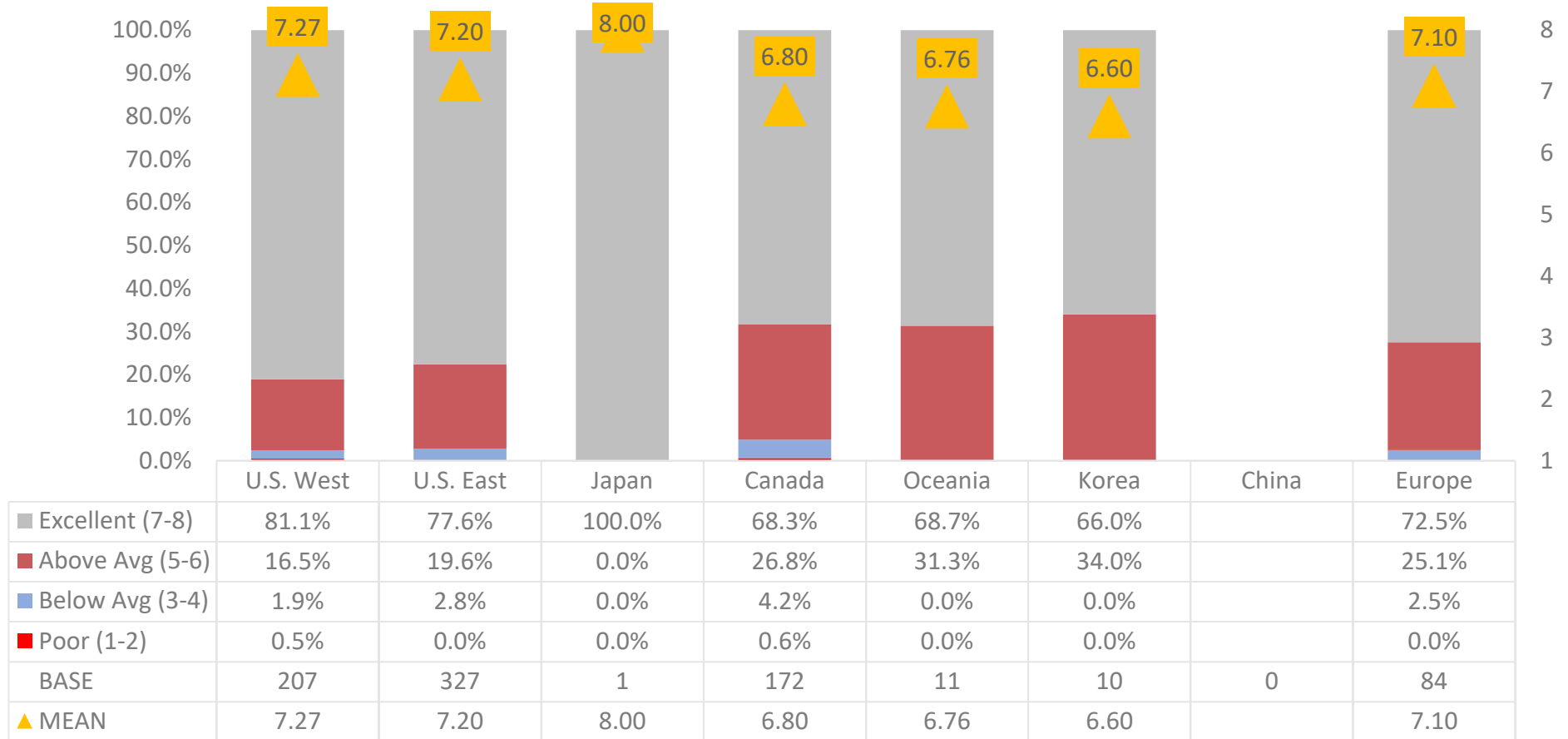
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



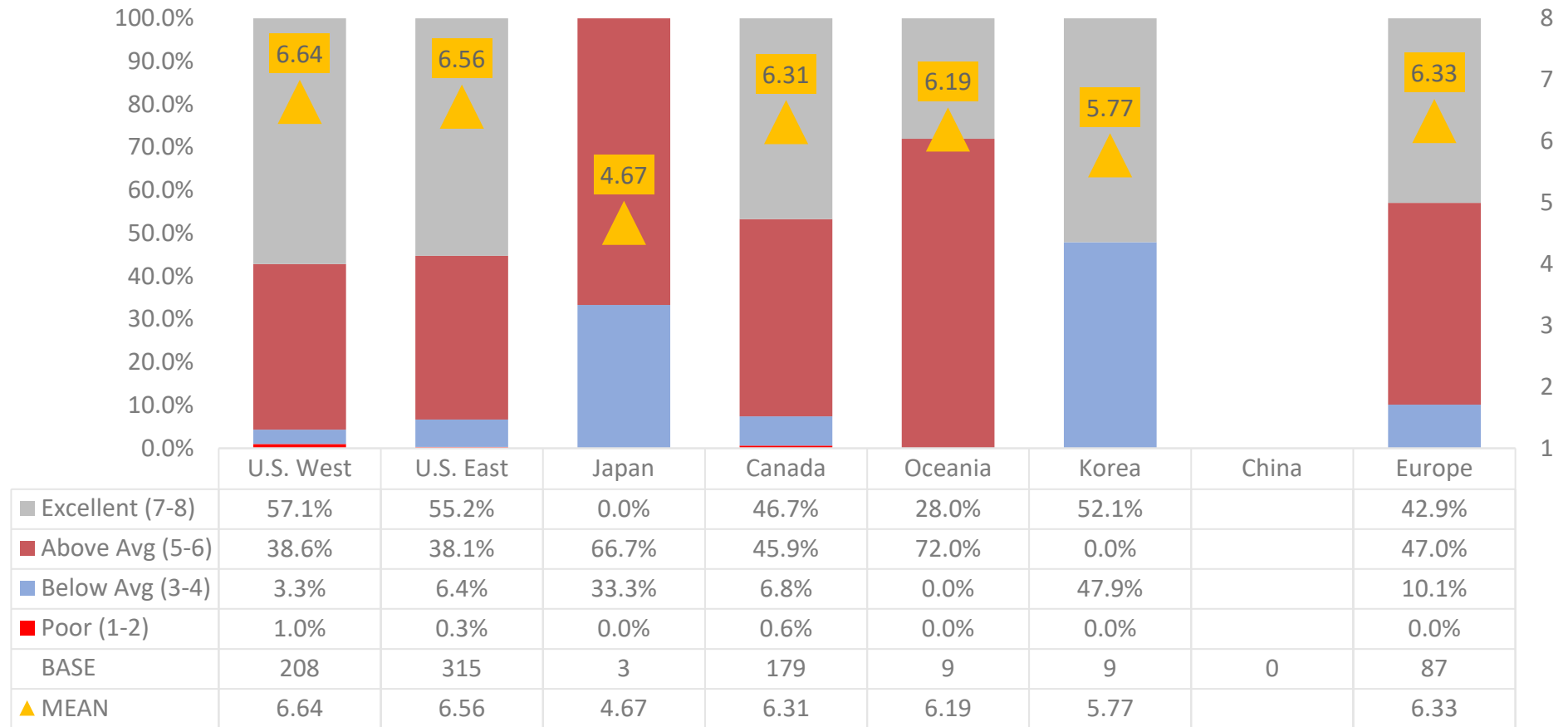
# ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



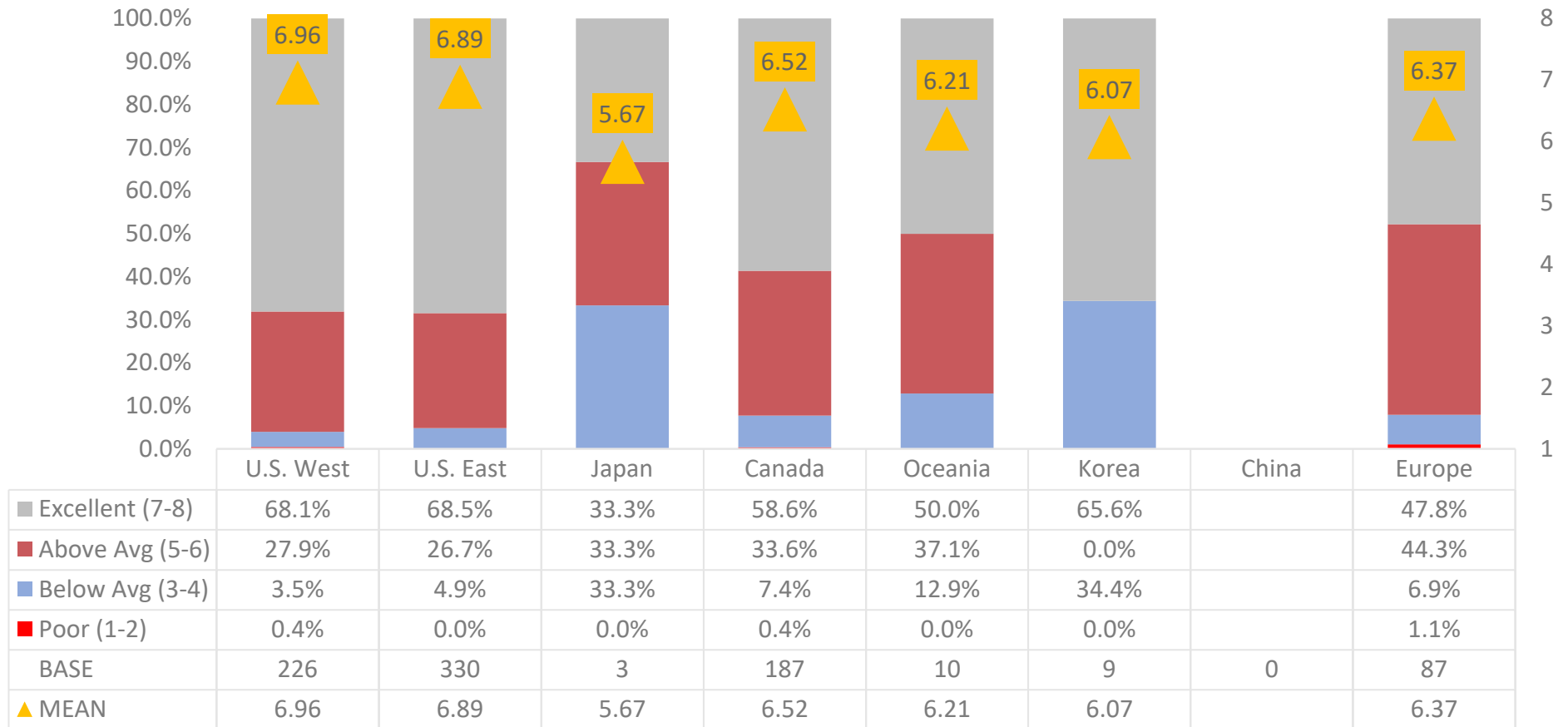
# SHOPPING - KAUA'I

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



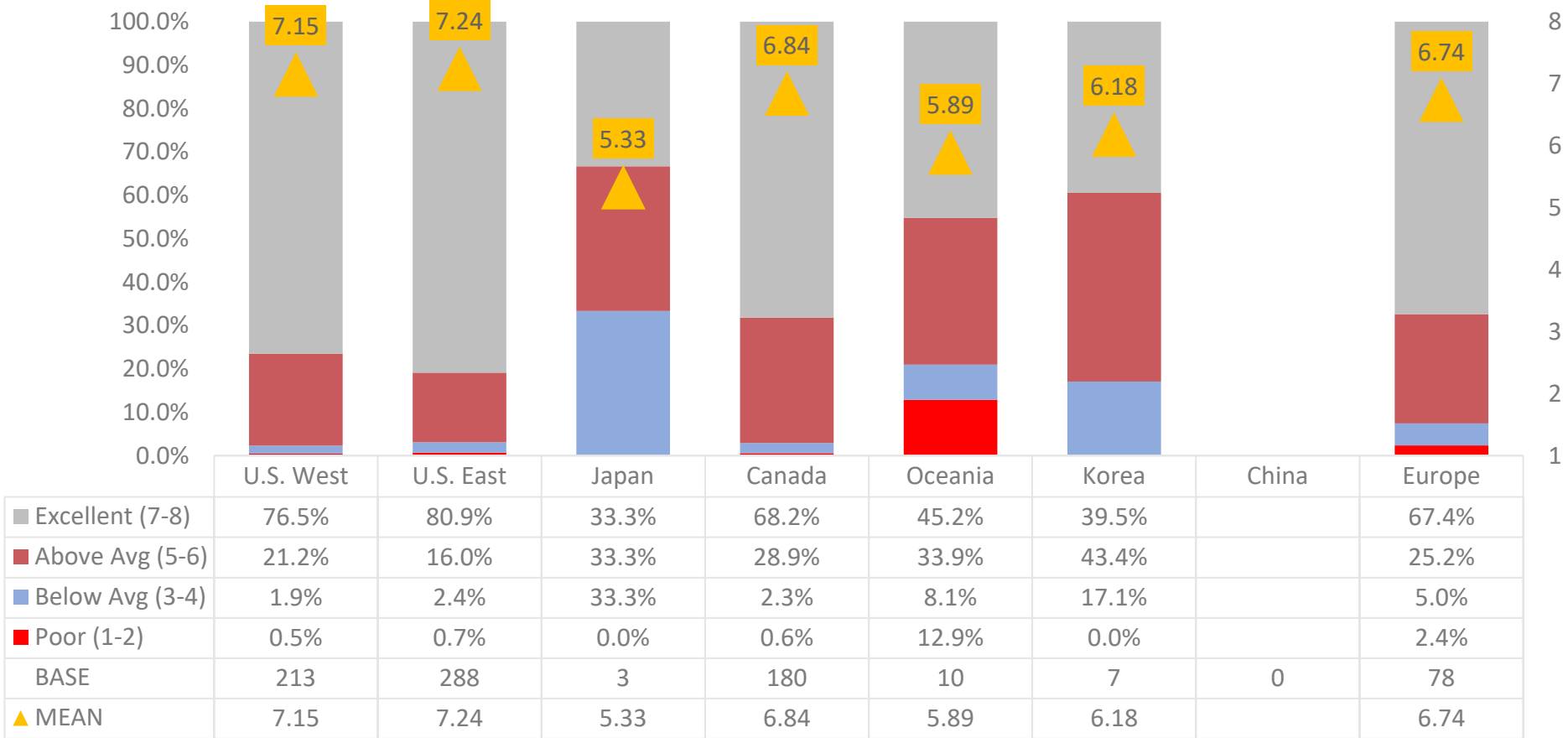
# DINING/ FOOD & BEVERAGE - KAUA'I

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



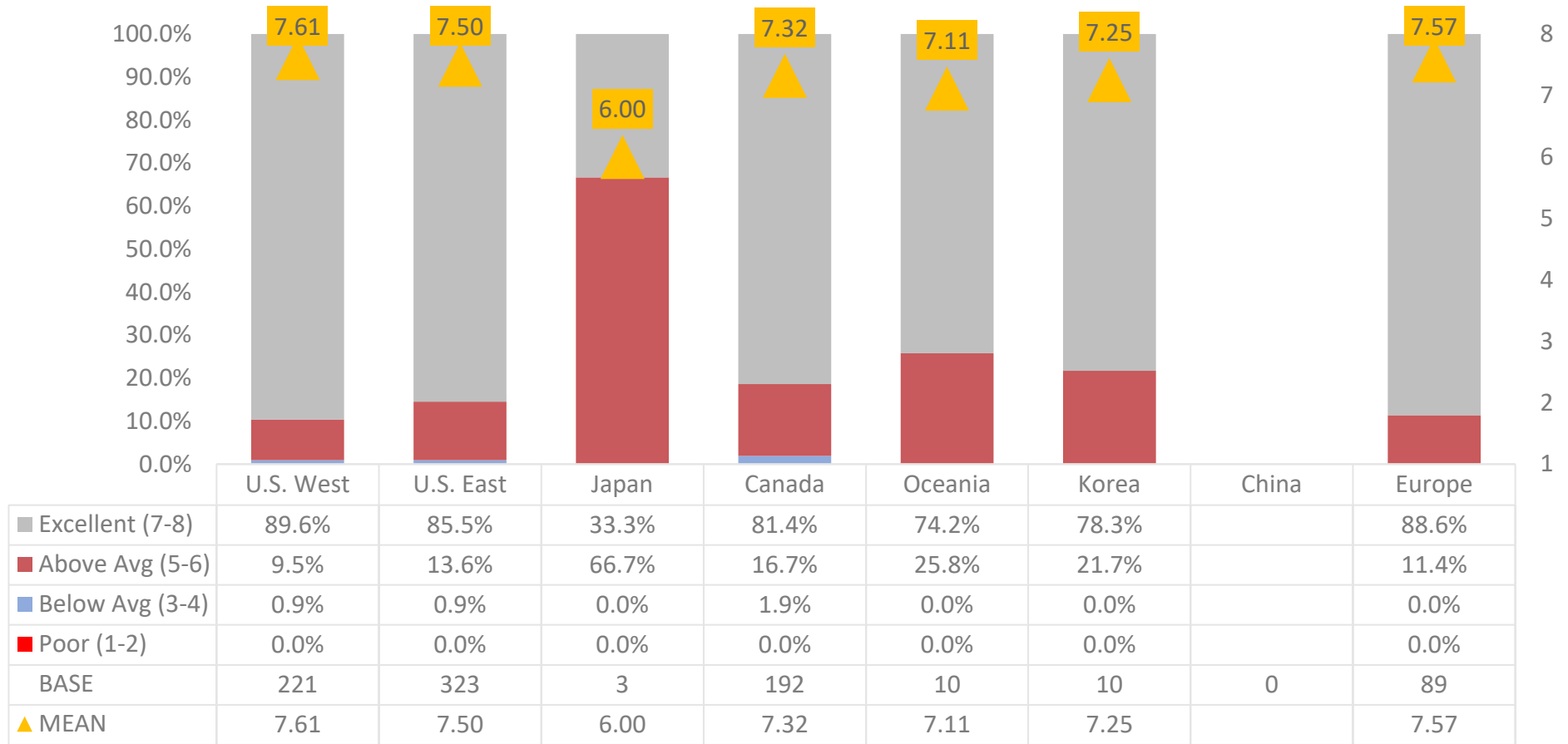
# LODGING/ ACCOMMODATIONS - KAUA'I

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



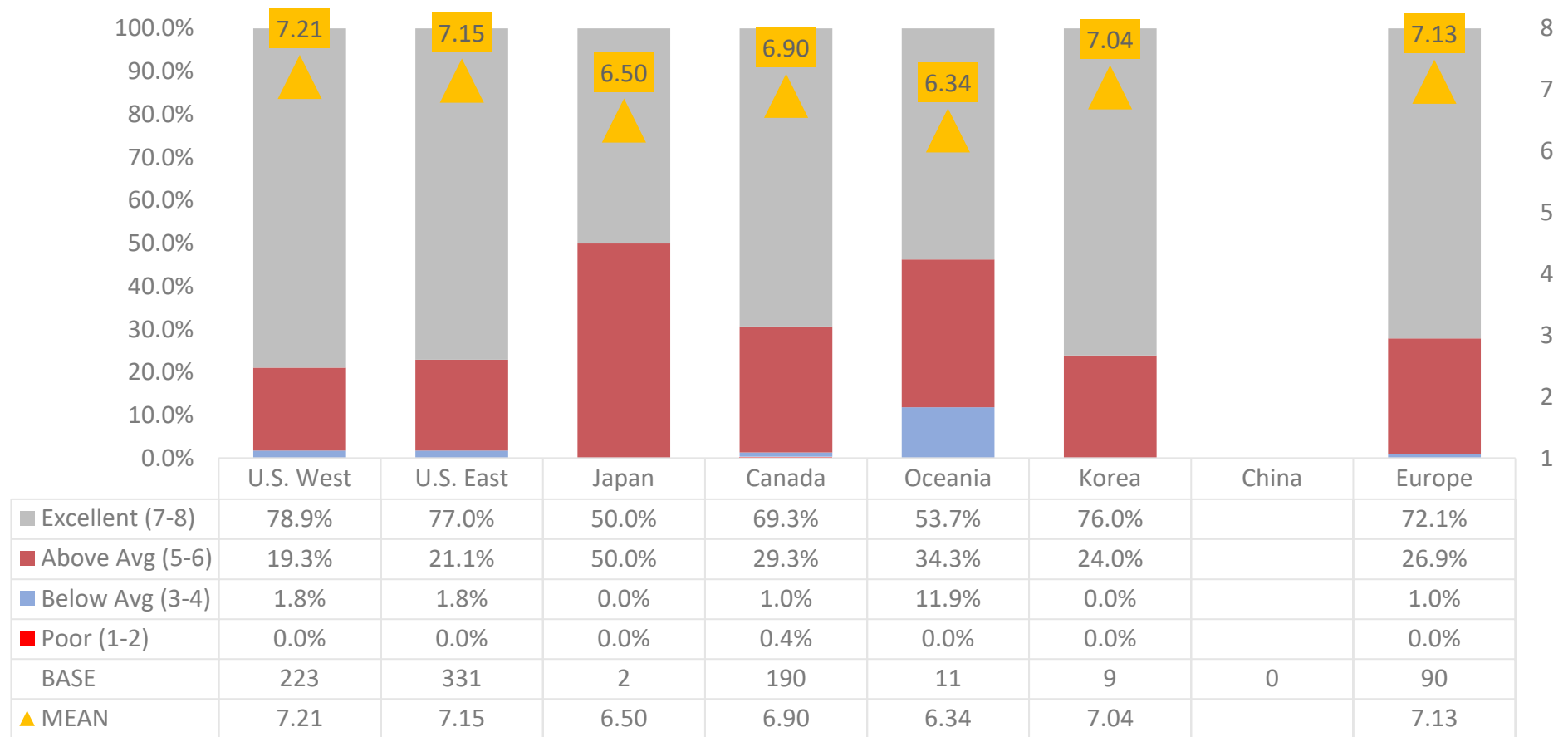
# BEACHES - KAUA'I

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



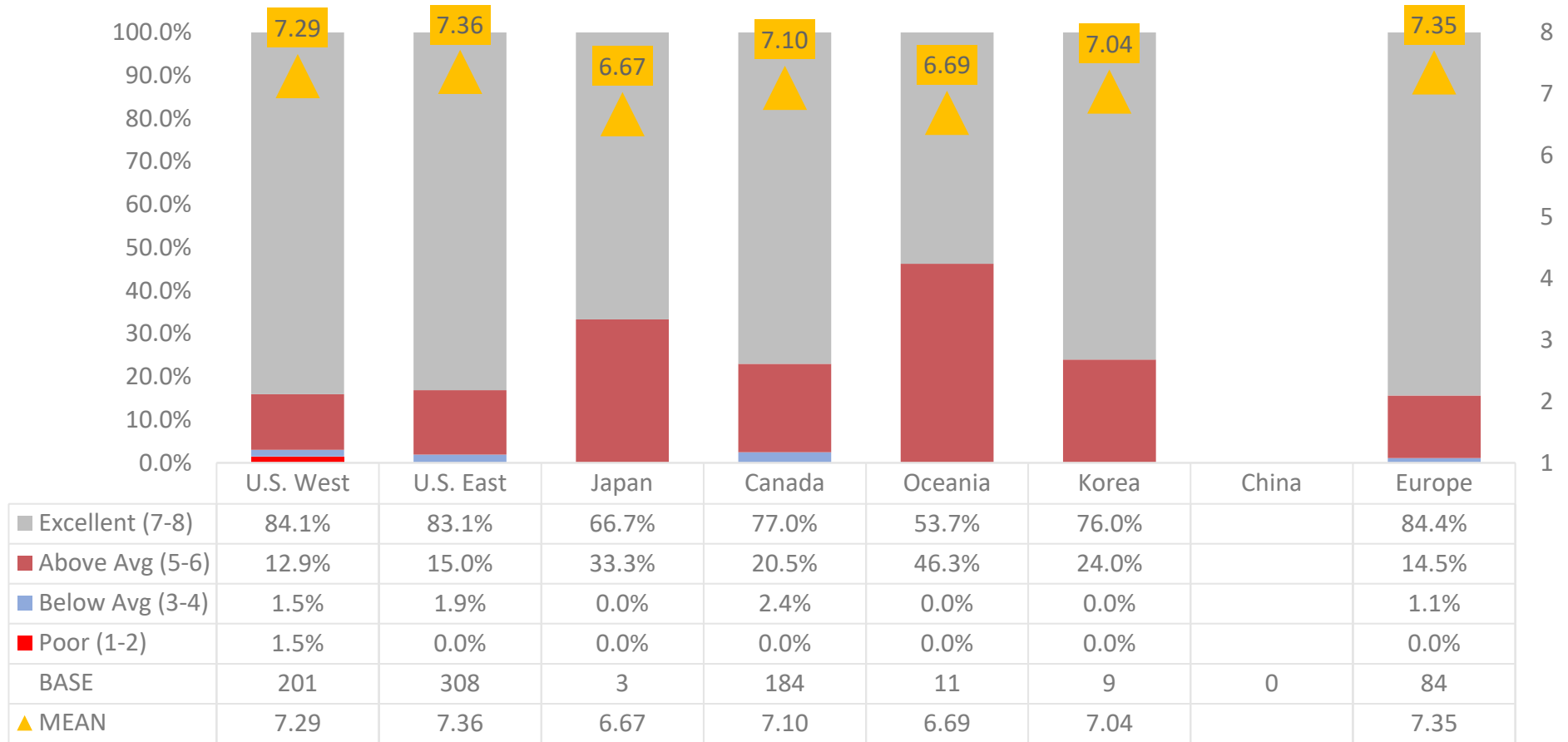
# PUBLIC AREAS - KAUA'I

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



# PARKS - KAUA'I

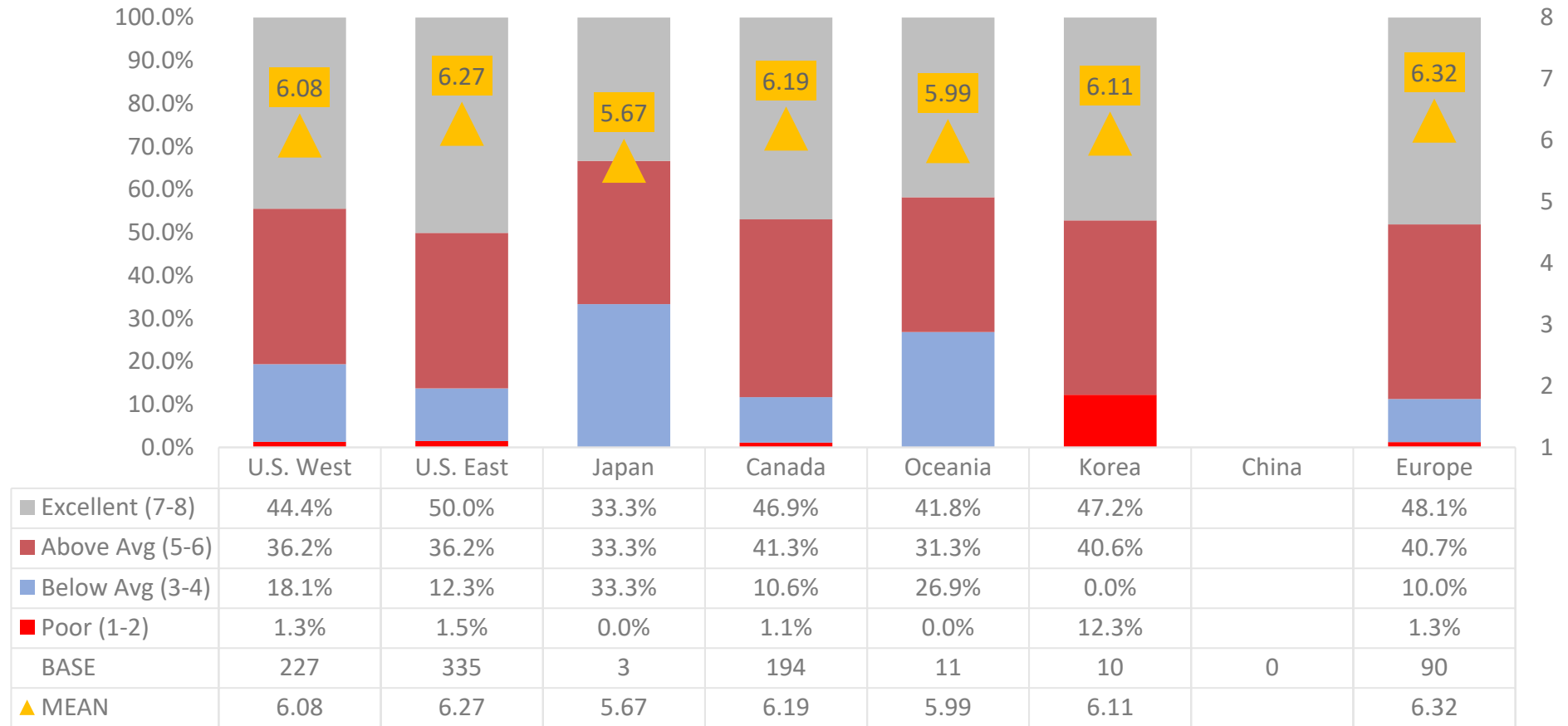
8-pt Rating Scale  
8 = Excellent / 1 = Poor





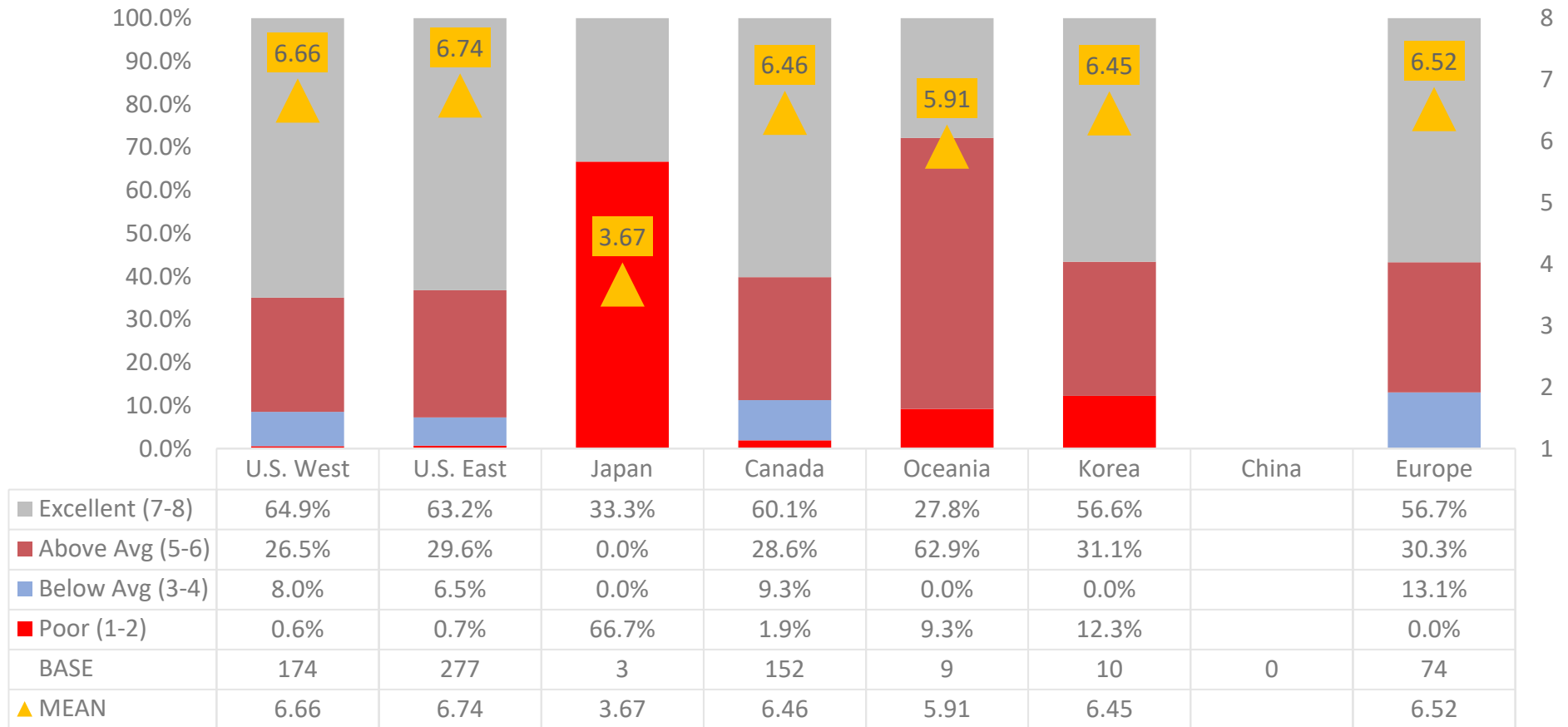
# ROADS - KAUA'I

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



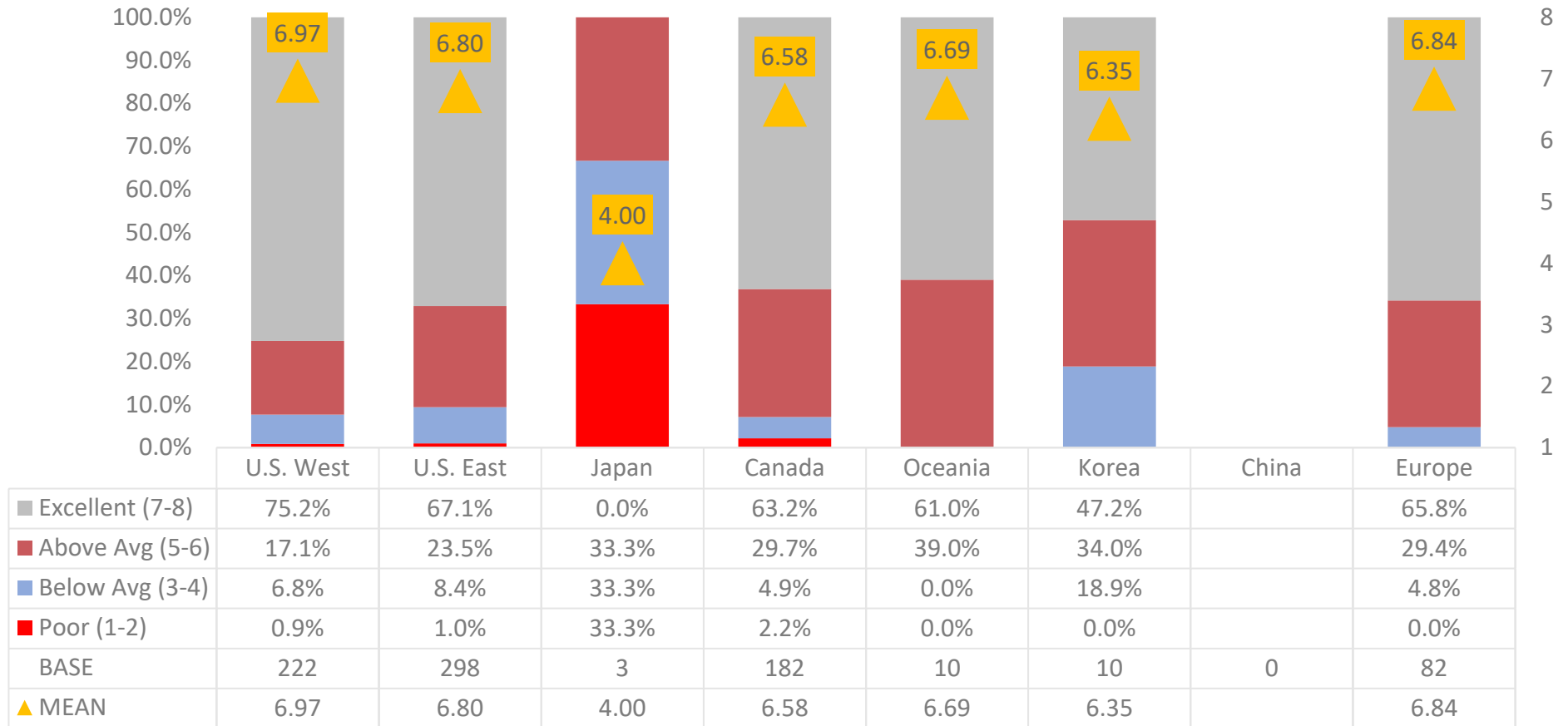
# TRANSPORTATION ON ISLAND - KAUA'I

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



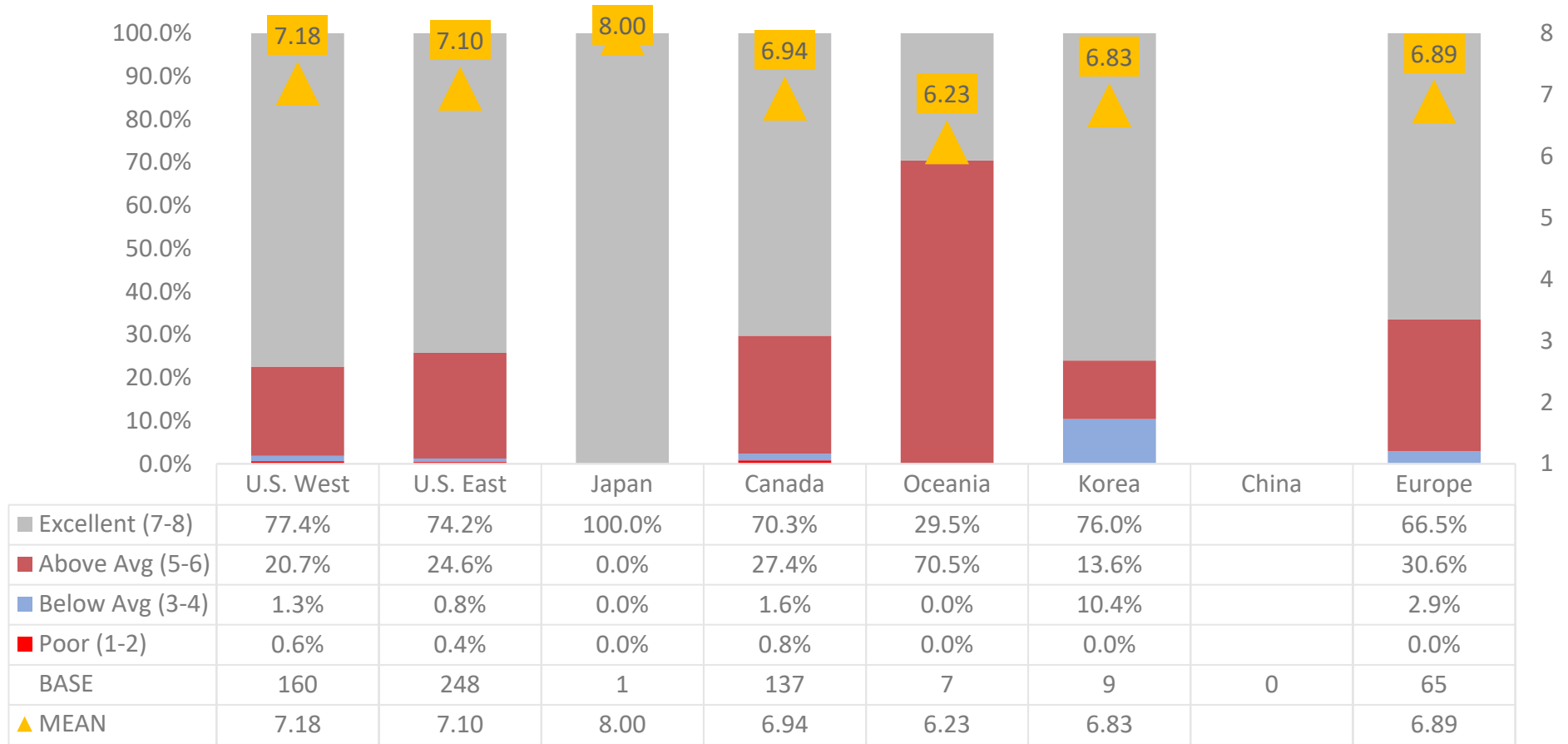
# AIRPORT- KAUA'I

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



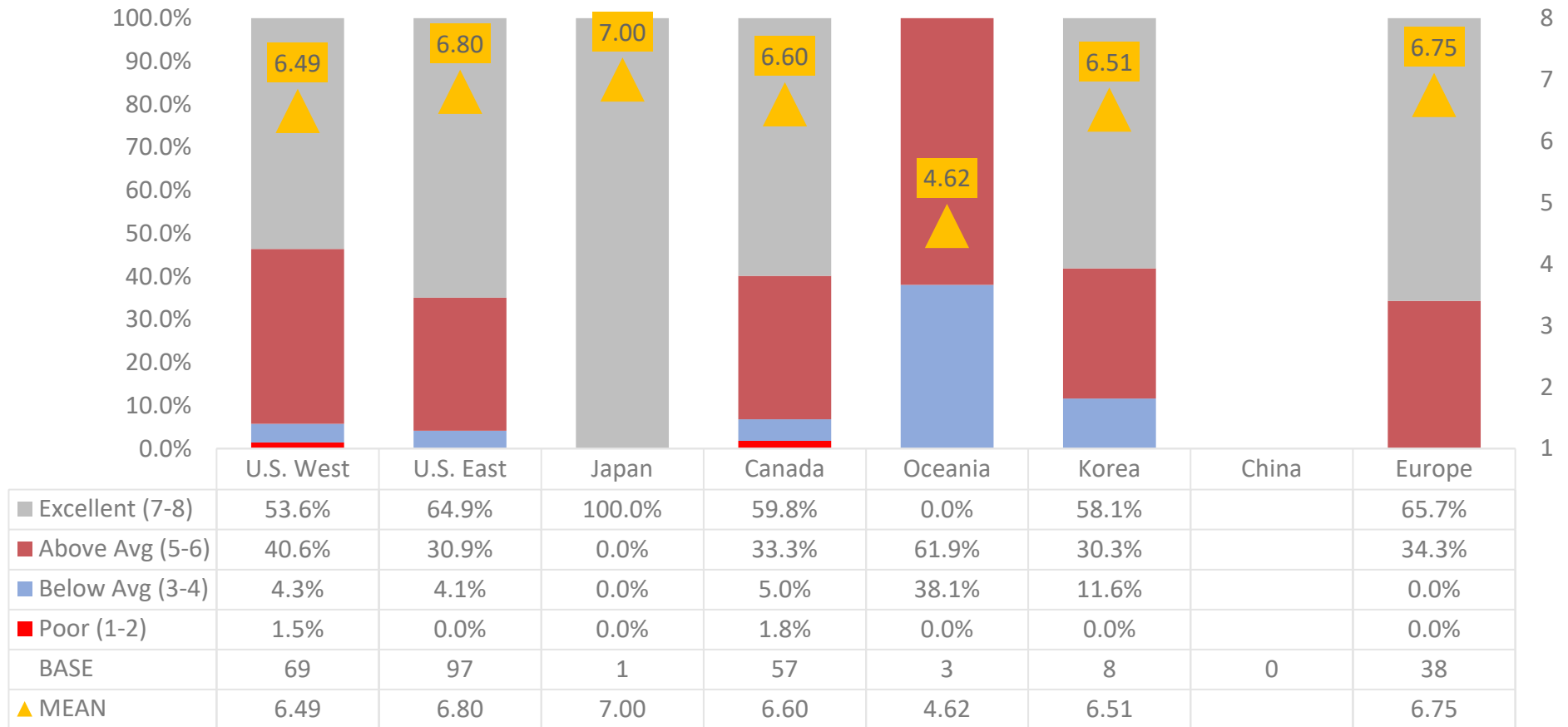
# CULTURAL ACTIVITIES - KAUA'I

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



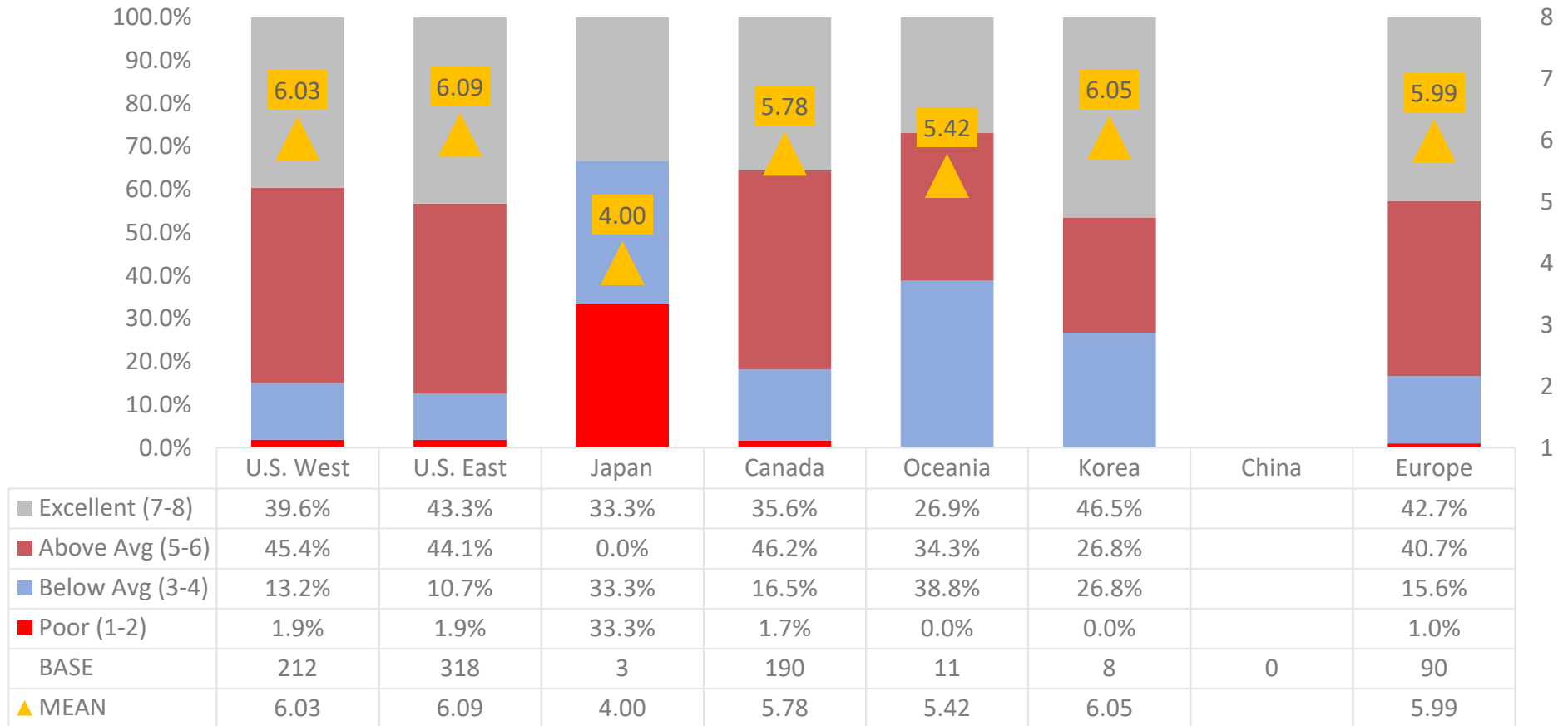
# VOLUNTEER ACTIVITIES - KAUA'I

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



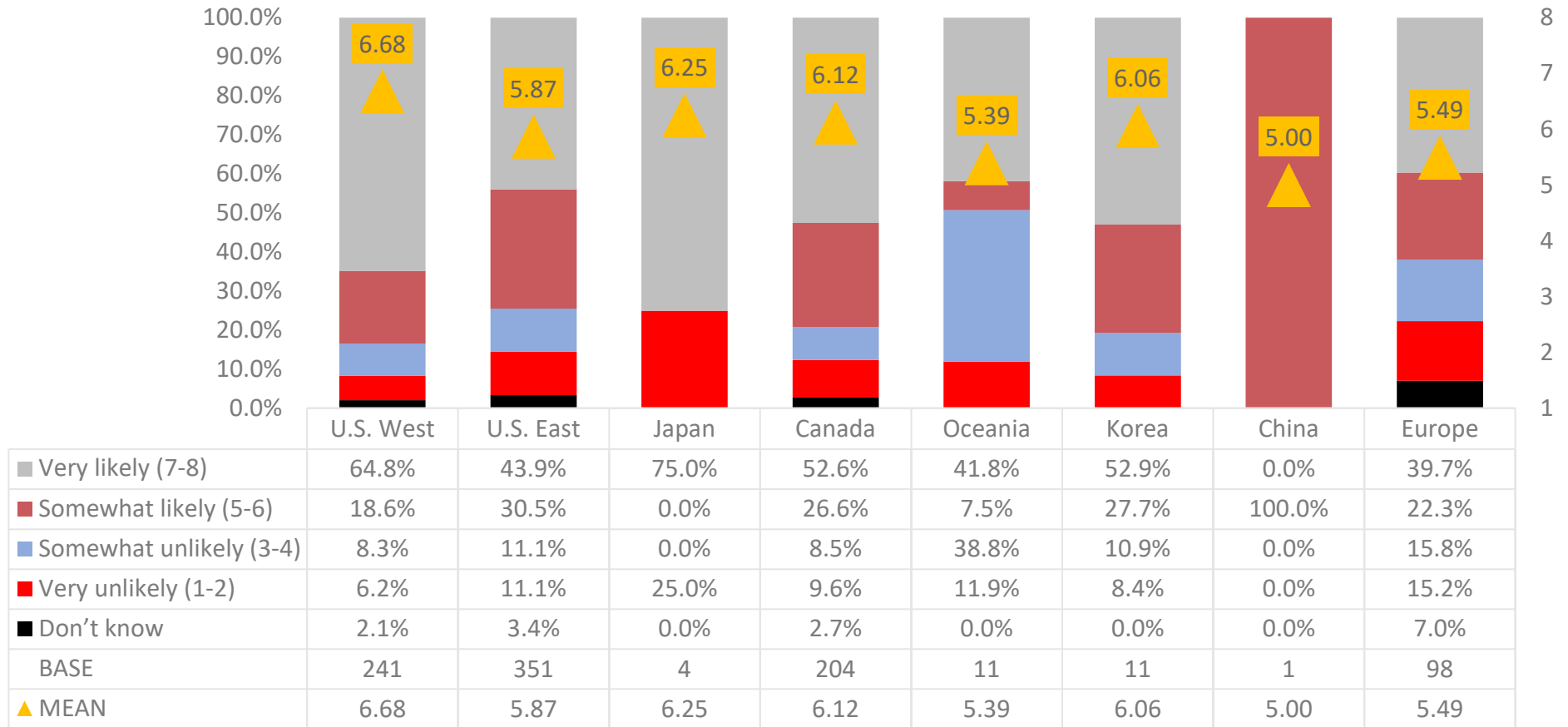
# VALUE FOR THE MONEY- KAUA'I

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



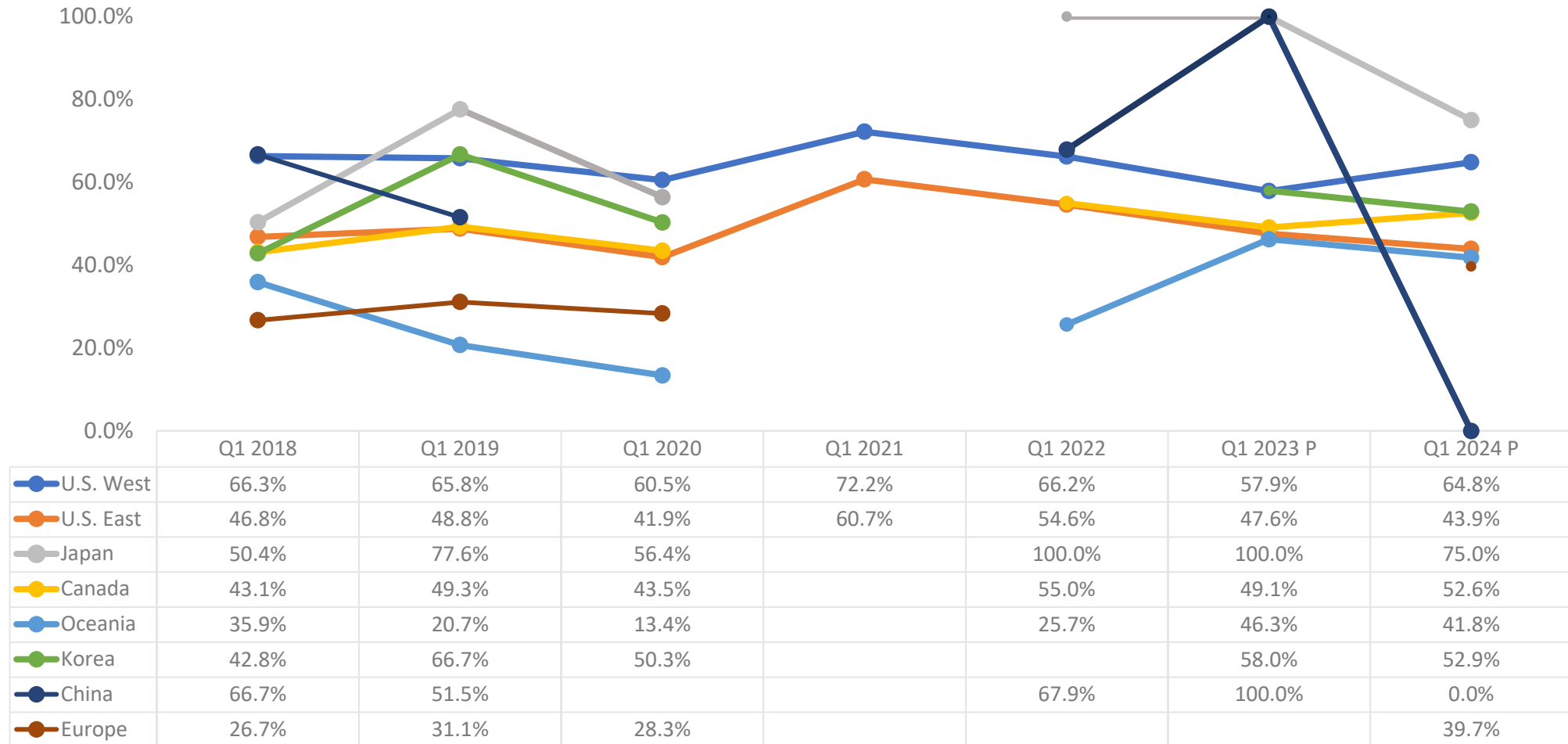
# LIKELIHOOD OF RETURN VISIT - KAUA'I

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



# LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)



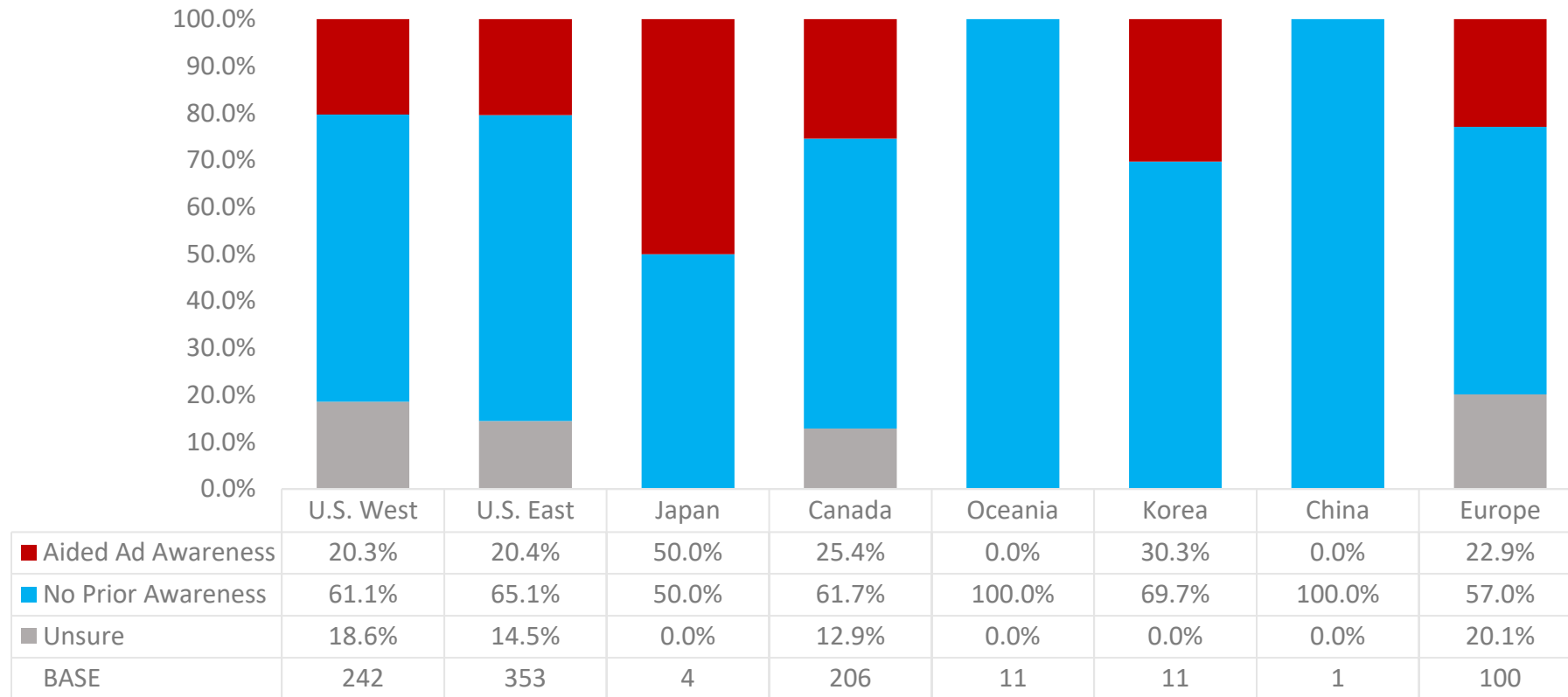
P= Preliminary Data

Q. How likely are you to visit Kaua'i again in the next five years?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



# AIDED ADVERTISING AWARENESS - KAUA'I

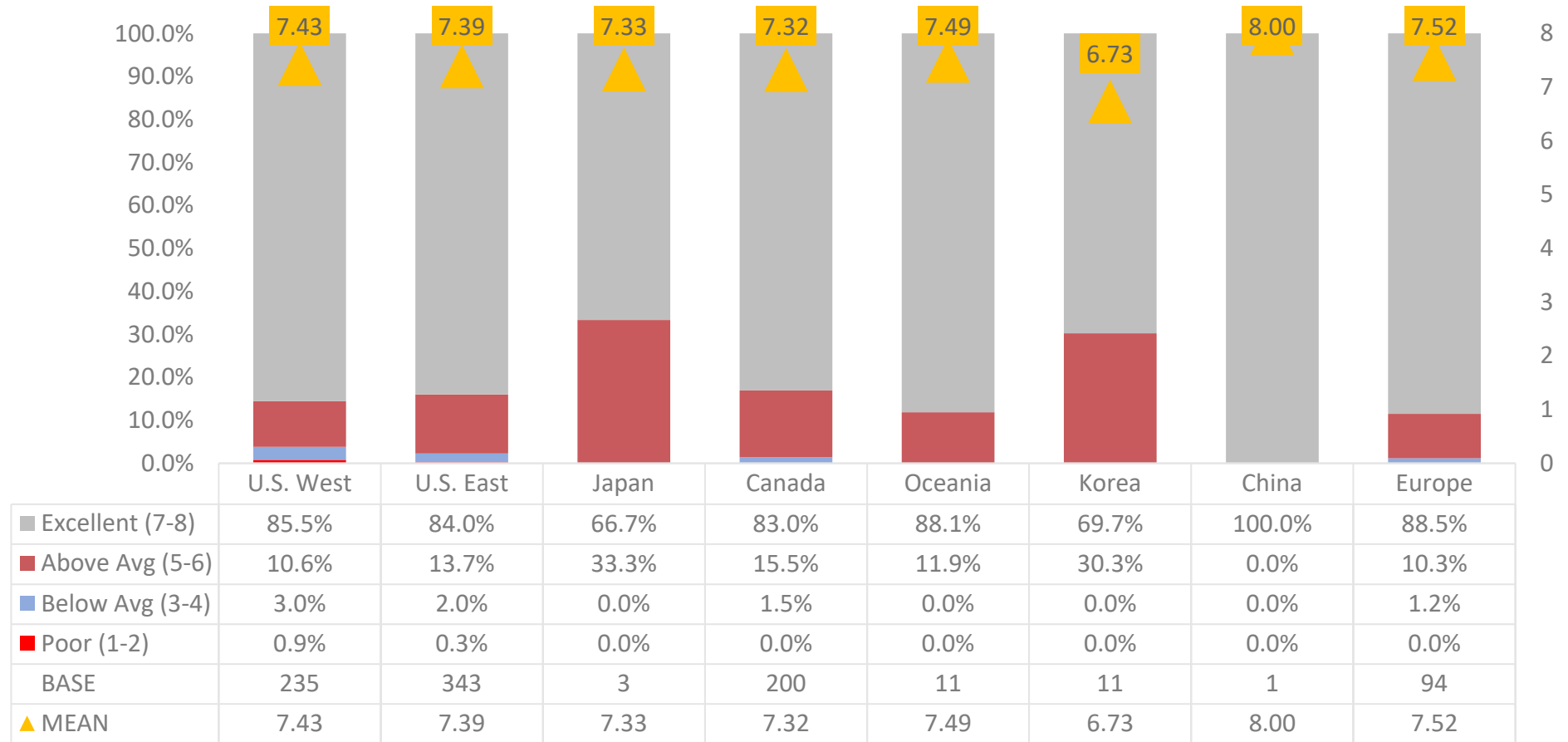


# MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	42.1%	47.6%	25.0%	47.7%	53.7%	41.2%	100.0%	57.9%
<b>Hawaiian cultural events</b>	5.0%	6.5%	0.0%	3.0%	0.0%	0.0%	0.0%	2.2%
<b>Outdoor or sporting activities and events</b>	11.5%	16.7%	25.0%	17.0%	7.5%	0.0%	0.0%	11.4%
<b>Social media posts and videos</b>	6.6%	7.6%	0.0%	10.6%	0.0%	19.3%	0.0%	16.6%
<b>Hawaiian music</b>	4.6%	2.0%	0.0%	3.0%	0.0%	0.0%	0.0%	4.1%
<b>Television programs or movies filmed in Hawai'i</b>	2.5%	5.7%	0.0%	6.6%	0.0%	36.1%	0.0%	14.2%
<b>BASE</b>	242	353	4	206	11	11	1	100

# FRIENDLINESS OF KAUA‘I RESIDENTS

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



# TOP TRIP INFLUENCERS - KAUA'I

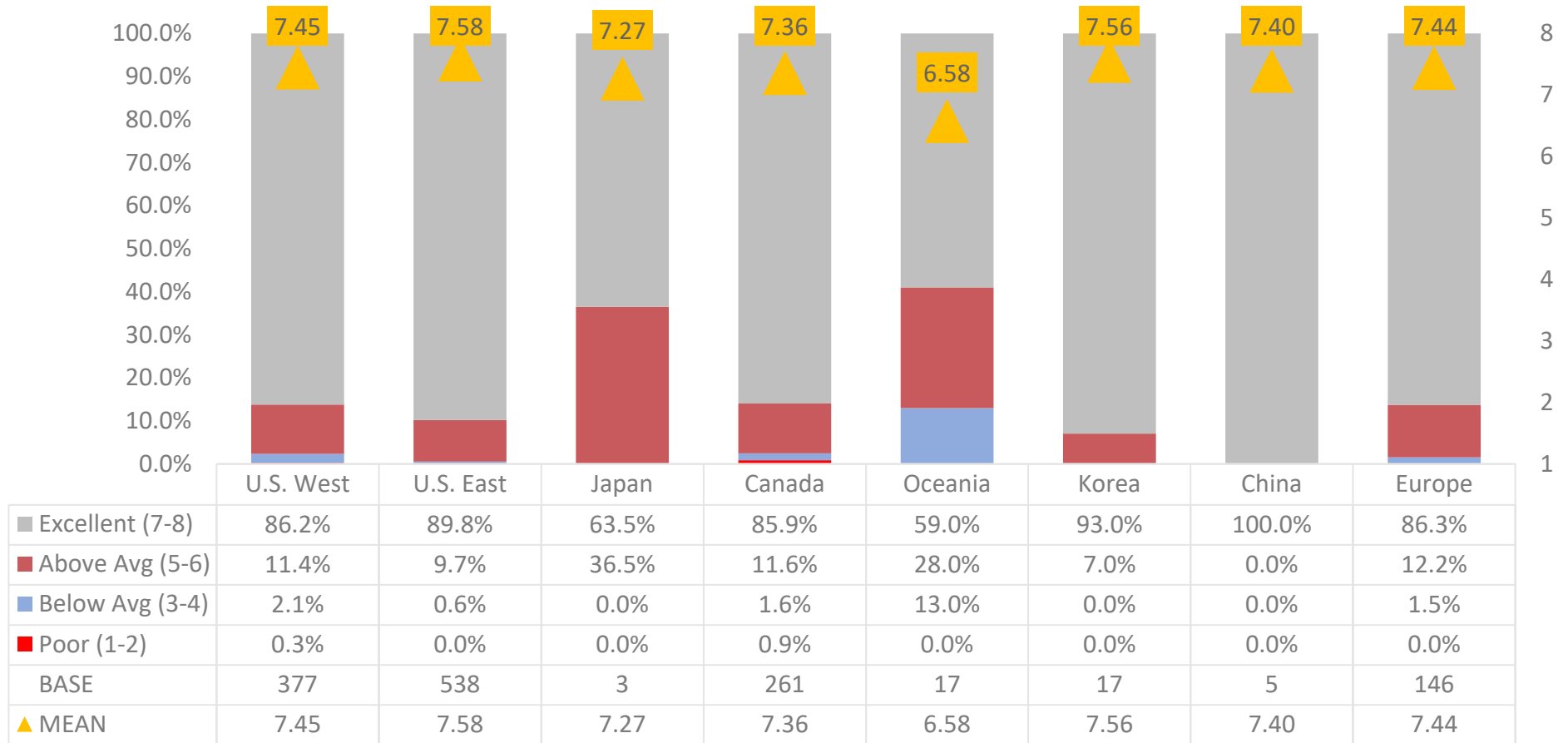
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China*	Europe
Been here before	51.5%	31.6%	33.3%	37.9%	14.9%	10.9%	0.0%	17.4%
Friend recommendation	21.1%	27.8%	66.7%	30.8%	43.3%	47.1%	0.0%	25.7%
Cruise line stop/part of tour	1.7%	14.3%	0.0%	7.0%	0.0%	0.0%	0.0%	13.0%
Visiting Family/ Friends	5.6%	3.0%	0.0%	3.9%	0.0%	8.4%	0.0%	3.5%
Location/ Never been, but went to other islands	2.2%	3.3%	0.0%	3.9%	7.5%	0.0%	0.0%	1.2%
Attending Conference/ Event	1.7%	4.1%	0.0%	2.9%	0.0%	0.0%	0.0%	1.0%
Own a timeshare	2.6%	2.1%	0.0%	1.7%	0.0%	0.0%	0.0%	1.2%
Social Media Post	2.6%	1.5%	0.0%	3.4%	0.0%	0.0%	0.0%	5.1%
Article/ Blog	0.9%	3.2%	0.0%	3.0%	14.9%	0.0%	0.0%	9.2%
Package price/ affordability / cost	2.6%	0.6%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Travel Agent	1.3%	2.0%	0.0%	0.0%	0.0%	33.6%	0.0%	8.4%
Nature/ Beauty/ Scenery	0.9%	2.1%	0.0%	3.4%	0.0%	0.0%	0.0%	6.4%

\* No responses from Chinese visitors

# Section 7 – Maui

# SATISFACTION - MAUI

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

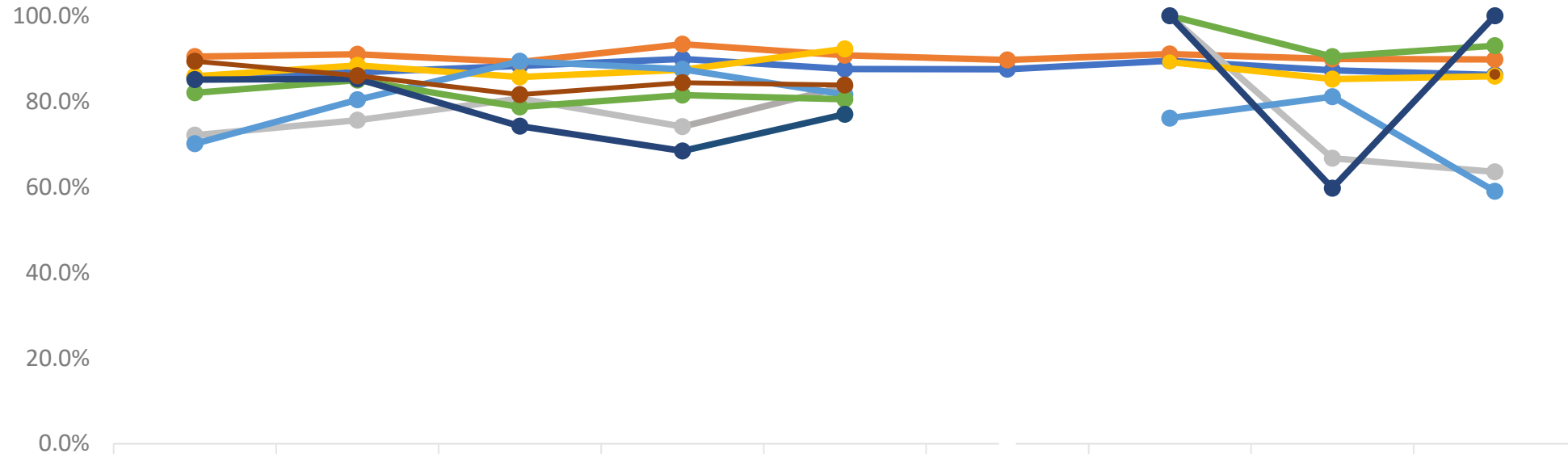


# SATISFACTION - MAUI

- **Gender:** Females from **U.S. West** gave higher satisfaction scores than males.
- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only Maui were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Age:** Visitors from **U.S. West** under the age of 50 years old gave higher satisfaction scores amongst the different age groups from this visitor market.
- **Education:** Visitors from **U.S. West** without a college degree were more satisfied with their stay than those with a college degree.

# SATISFACTION - MAUI

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



	Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	85.6%	86.8%	88.3%	89.9%	87.6%	87.5%	89.5%	87.3%	86.2%
U.S. East	90.5%	91.0%	89.2%	93.4%	90.8%	89.7%	91.1%	89.9%	89.8%
Japan	72.1%	75.6%	80.7%	74.1%	83.5%		100.0%	66.7%	63.5%
Canada	85.9%	88.4%	85.7%	87.4%	92.3%		89.2%	85.2%	85.9%
Oceania	70.1%	80.4%	89.4%	87.5%	81.6%		76.1%	81.1%	59.0%
Korea	82.0%	85.0%	78.7%	81.5%	80.5%		100.0%	90.5%	93.0%
China	85.1%	85.3%	74.2%	68.4%	77.0%		100.0%	59.7%	100.0%
Europe	89.4%	86.0%	81.6%	84.4%	83.8%				86.3%

P= Preliminary Data

Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on\_\_\_?

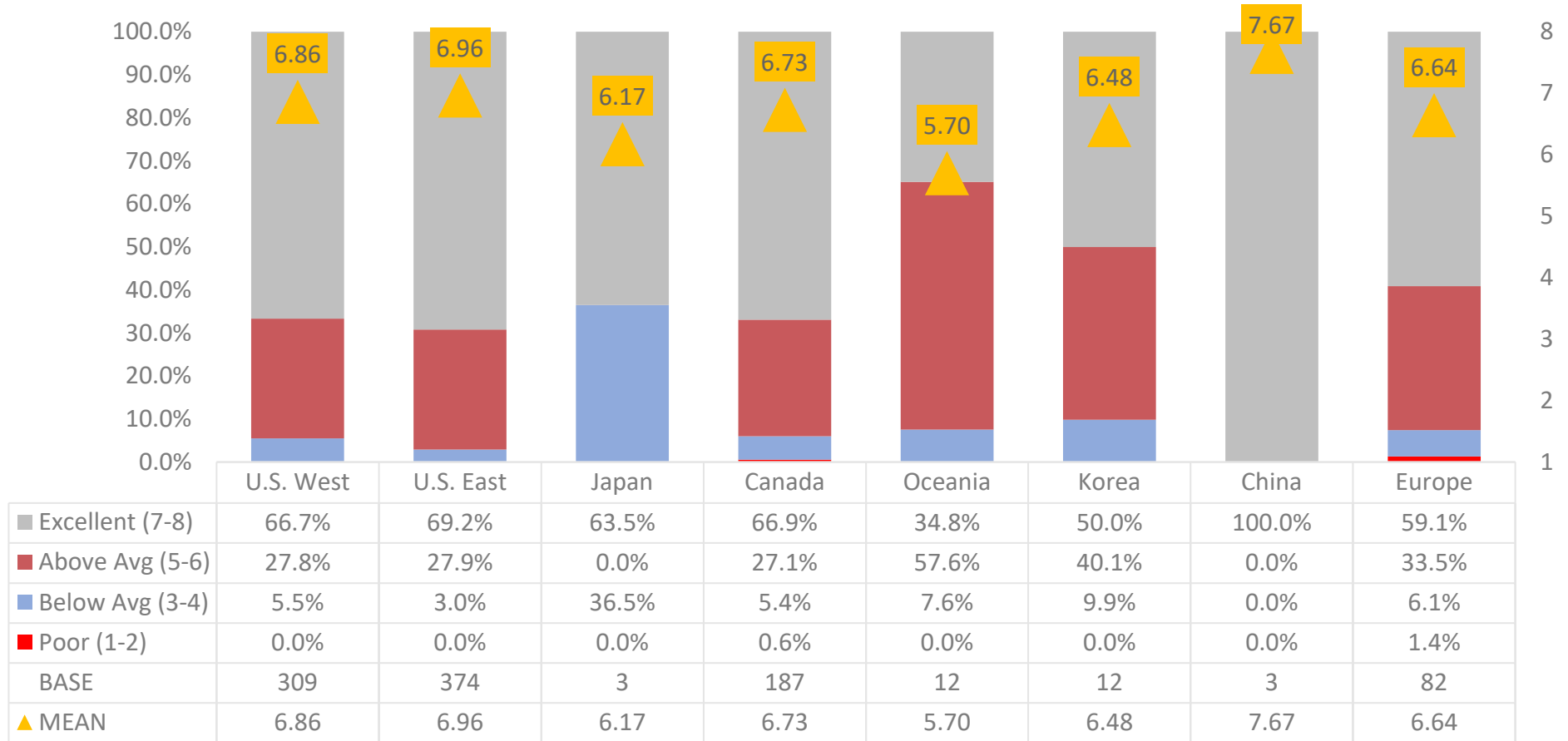
Note: Due to impact of the pandemic, there were too few travelers from Japan, Canada, Oceania, Korea, and China in 2020 and 2021 to provide an adequate sample size of visitors. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.





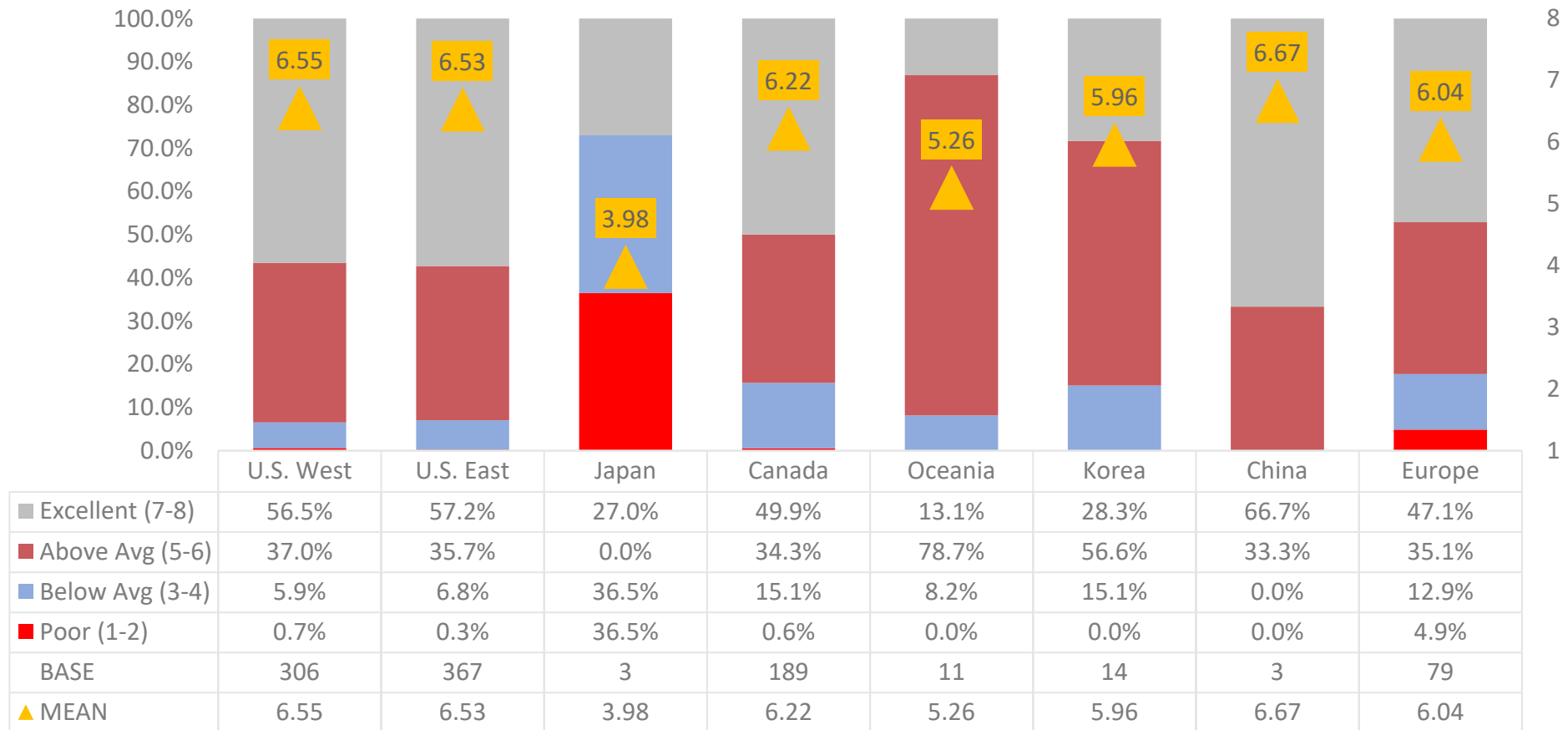
# ENTERTAINMENT/ ATTRACTIONS - MAUI

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



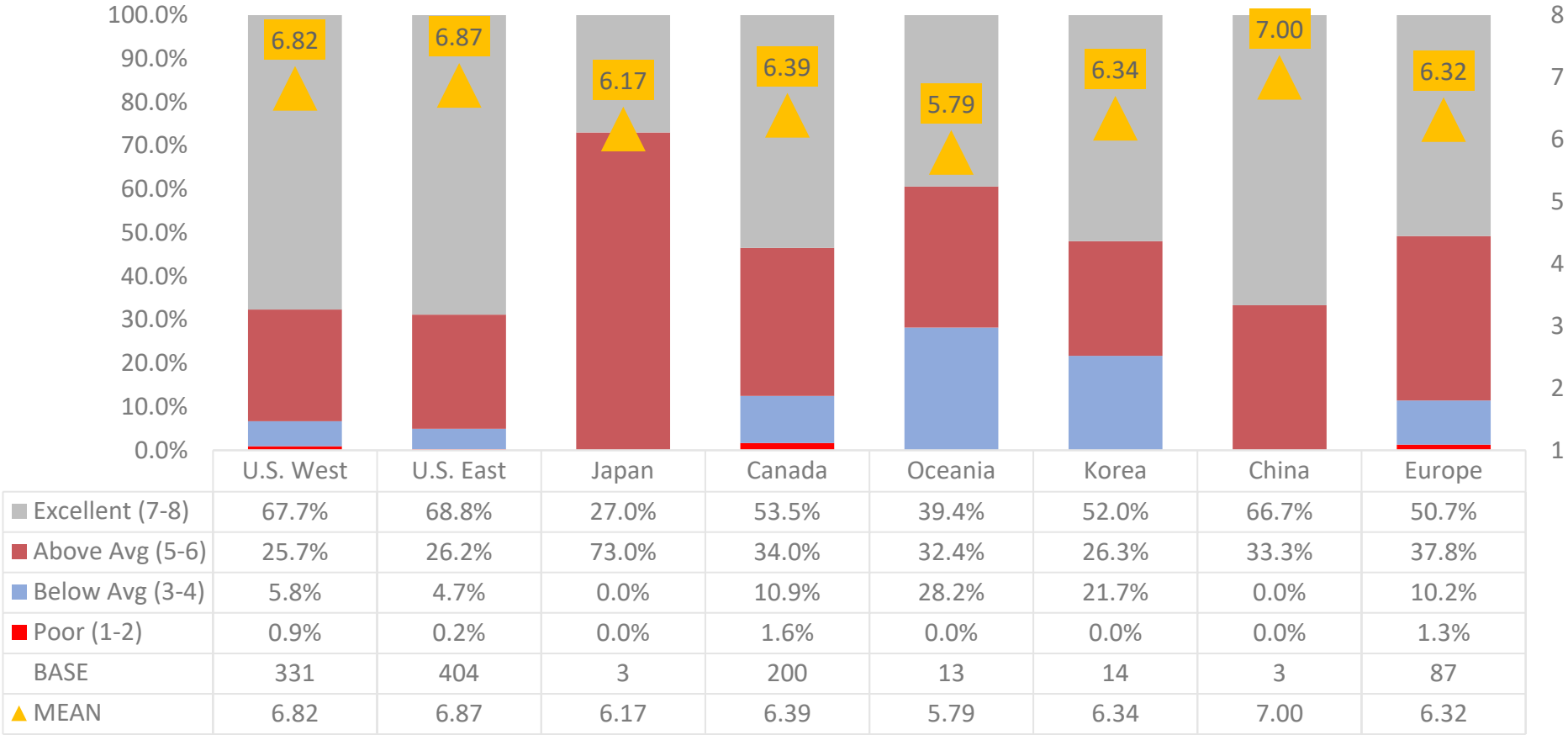
# SHOPPING - MAUI

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



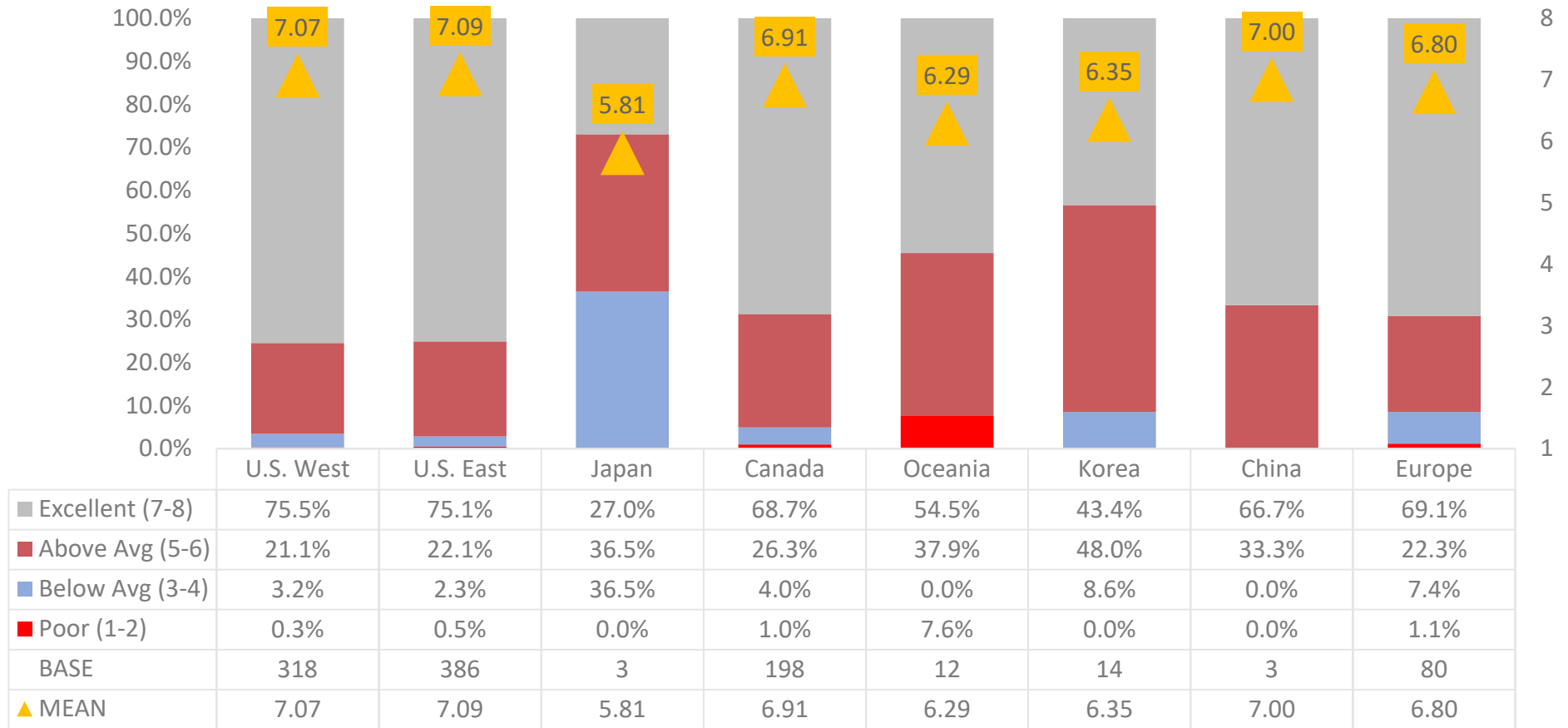
# DINING/ FOOD & BEVERAGE - MAUI

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



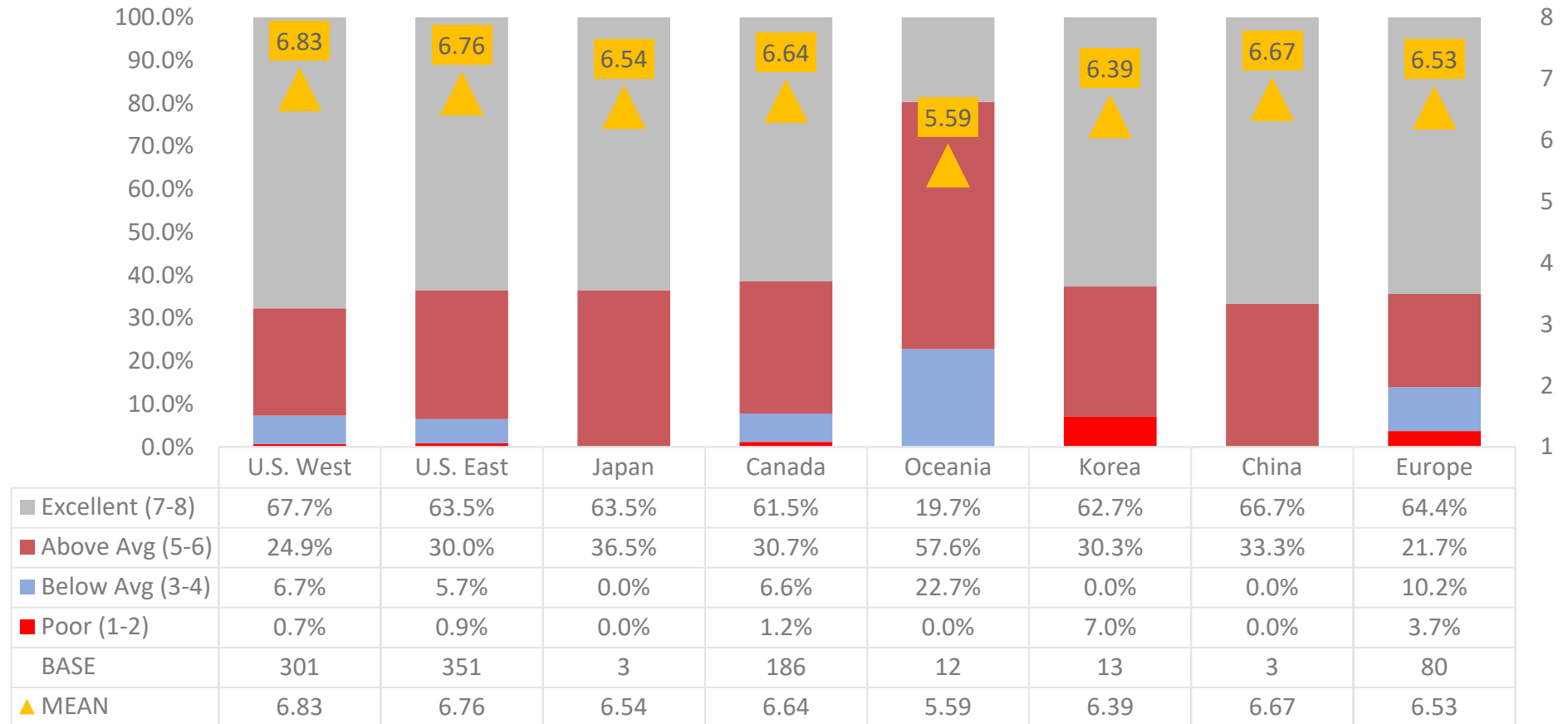
# LODGING/ ACCOMMODATIONS - MAUI

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



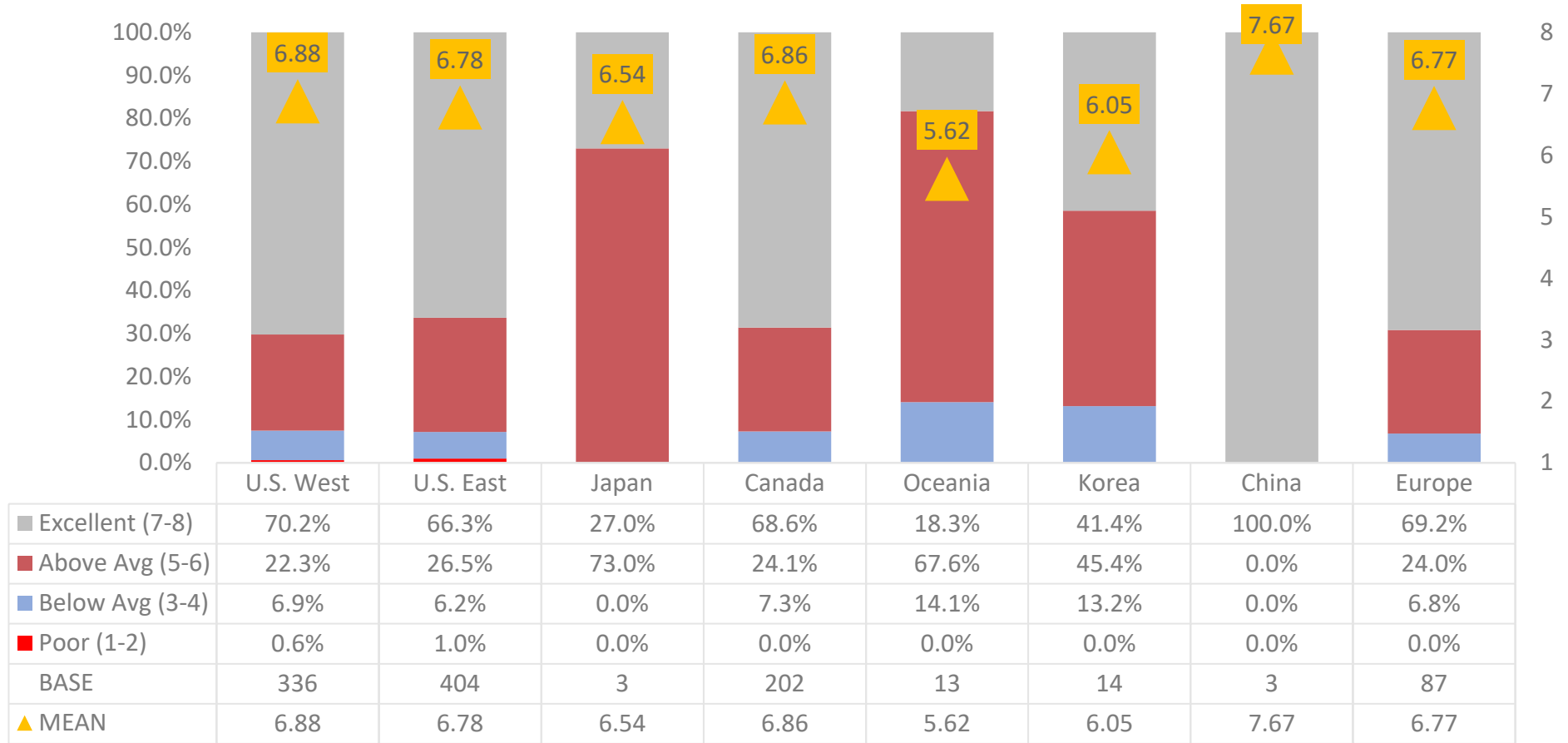
# TRANSPORTATION ON ISLAND - MAUI

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



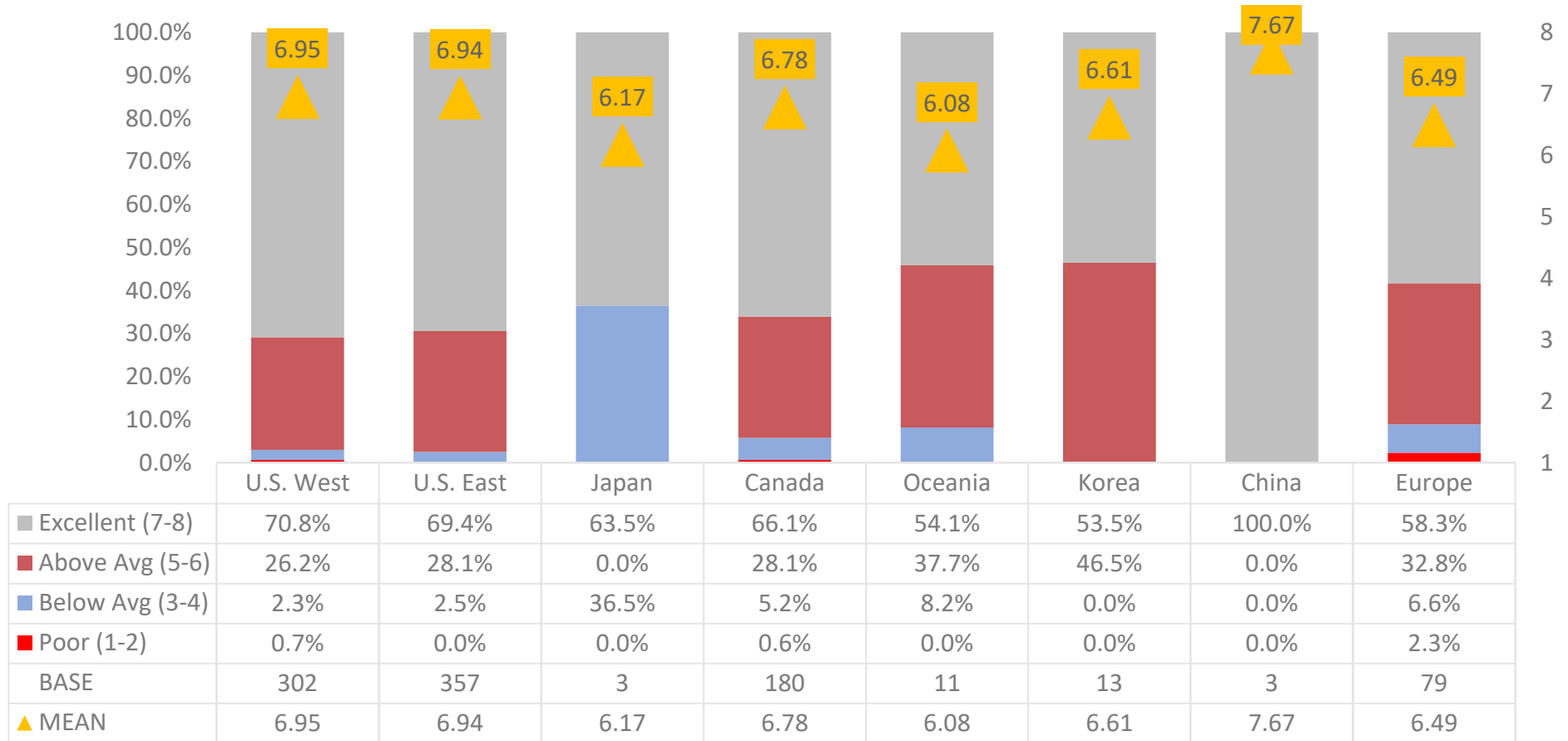
# AIRPORT - MAUI

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



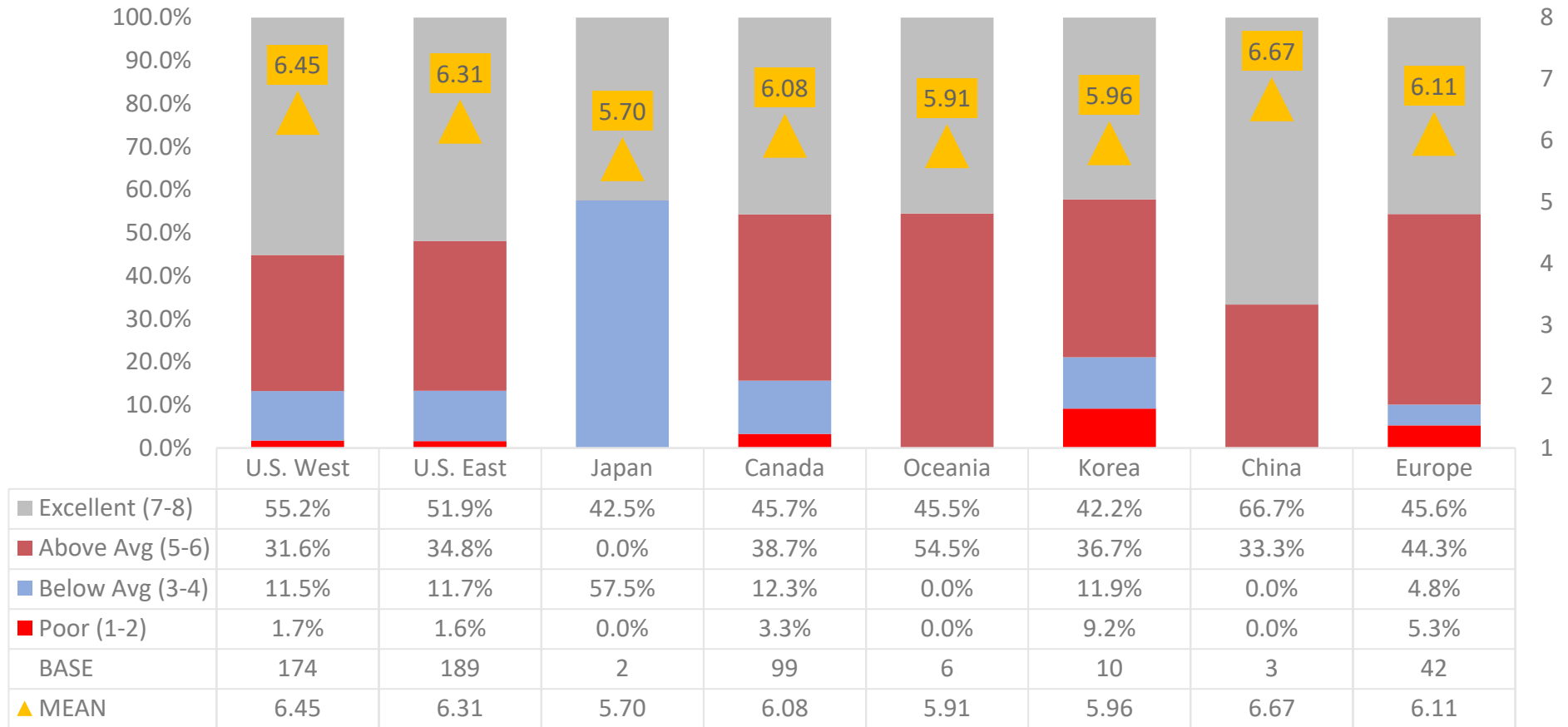
# CULTURAL EXPERIENCES - MAUI

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



# VOLUNTEER EXPERIENCES - MAUI

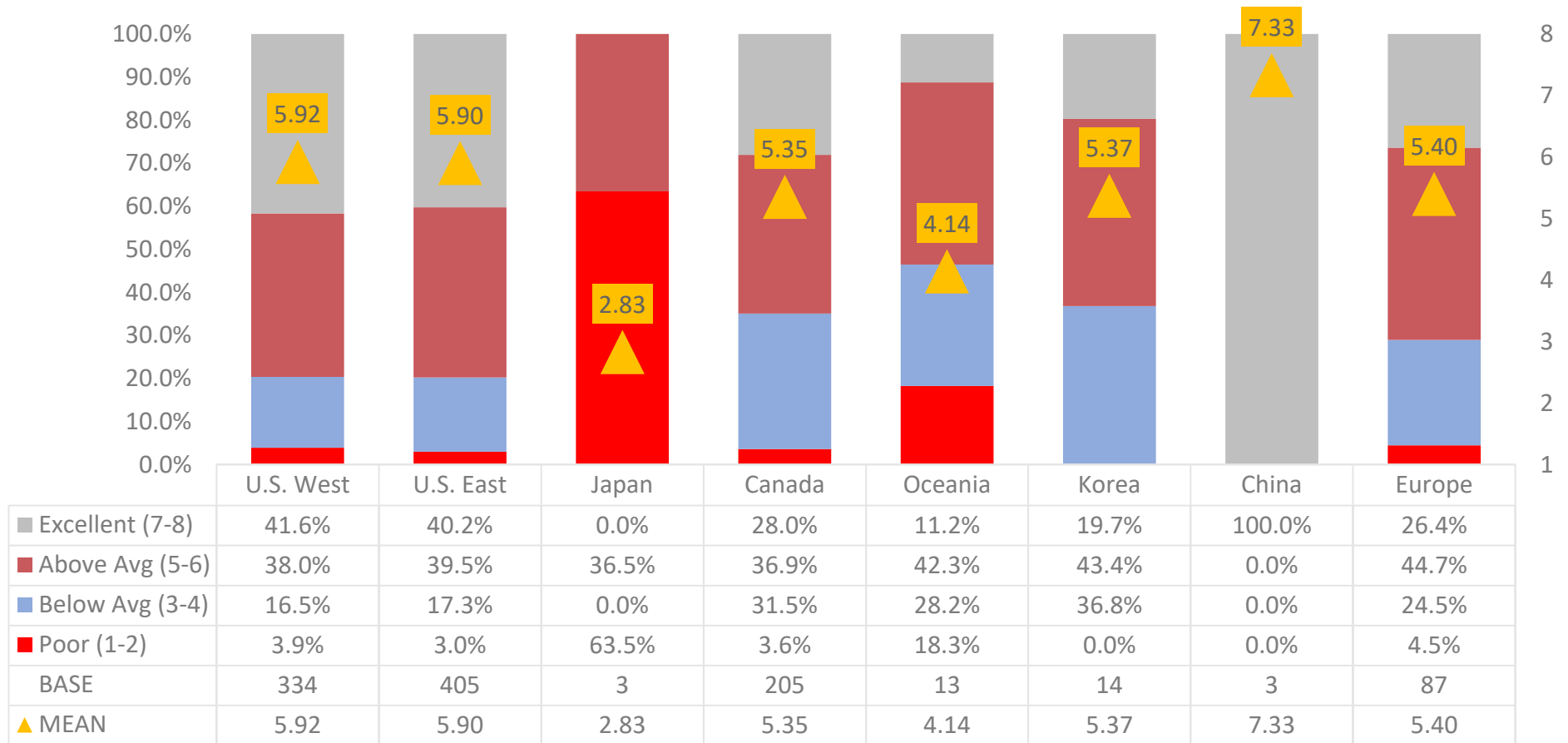
8-pt Rating Scale  
8=Excellent / 1=Poor





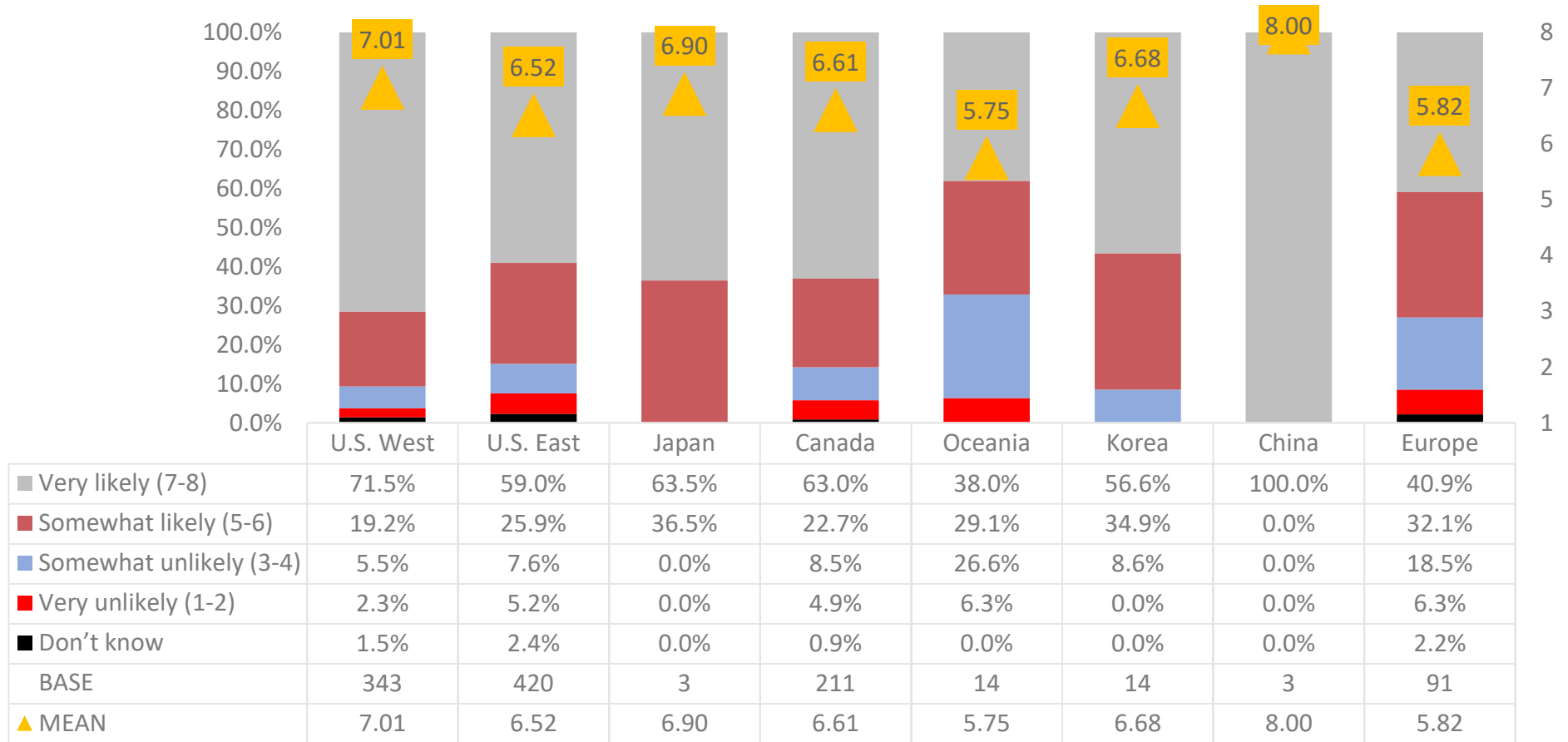
# VALUE FOR THE MONEY - MAUI

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



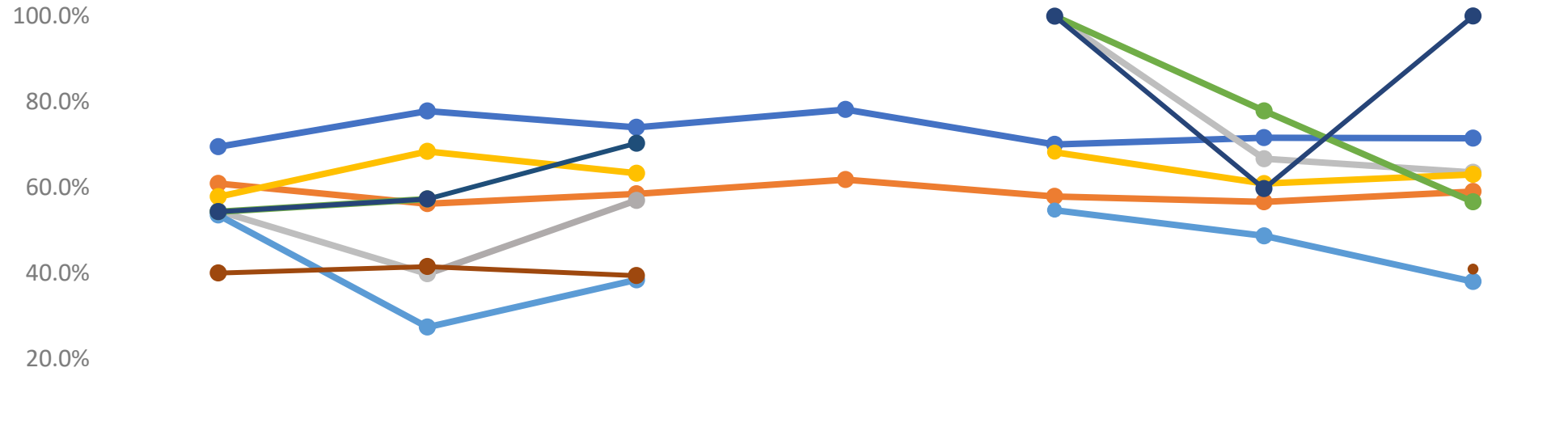
# LIKELIHOOD OF RETURN VISIT - MAUI

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



# LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	69.5%	77.8%	74.0%	78.2%	70.0%	71.6%	71.5%
U.S. East	60.9%	56.2%	58.5%	61.8%	57.9%	56.6%	59.0%
Japan	54.5%	39.8%	57.0%		100.0%	66.7%	63.5%
Canada	57.8%	68.4%	63.3%		68.2%	60.9%	63.0%
Oceania	53.5%	27.4%	38.4%		54.7%	48.7%	38.0%
Korea	54.3%	57.3%	70.3%		100.0%	77.9%	56.6%
China	54.3%	57.3%	70.3%		100.0%	59.7%	100.0%
Europe	40.0%	41.5%	39.4%				40.9%

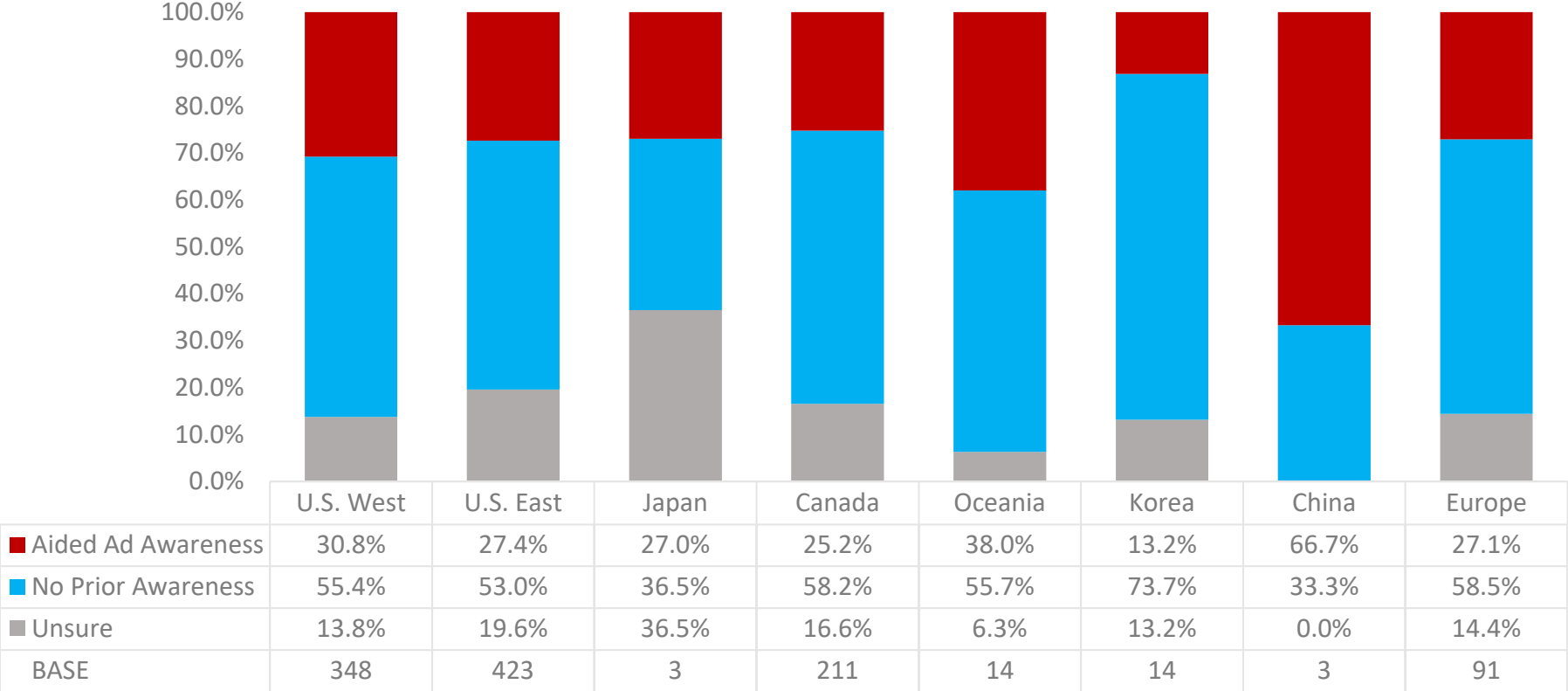
P= Preliminary Data

Q. How likely are you to visit Maui again in the next five years?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



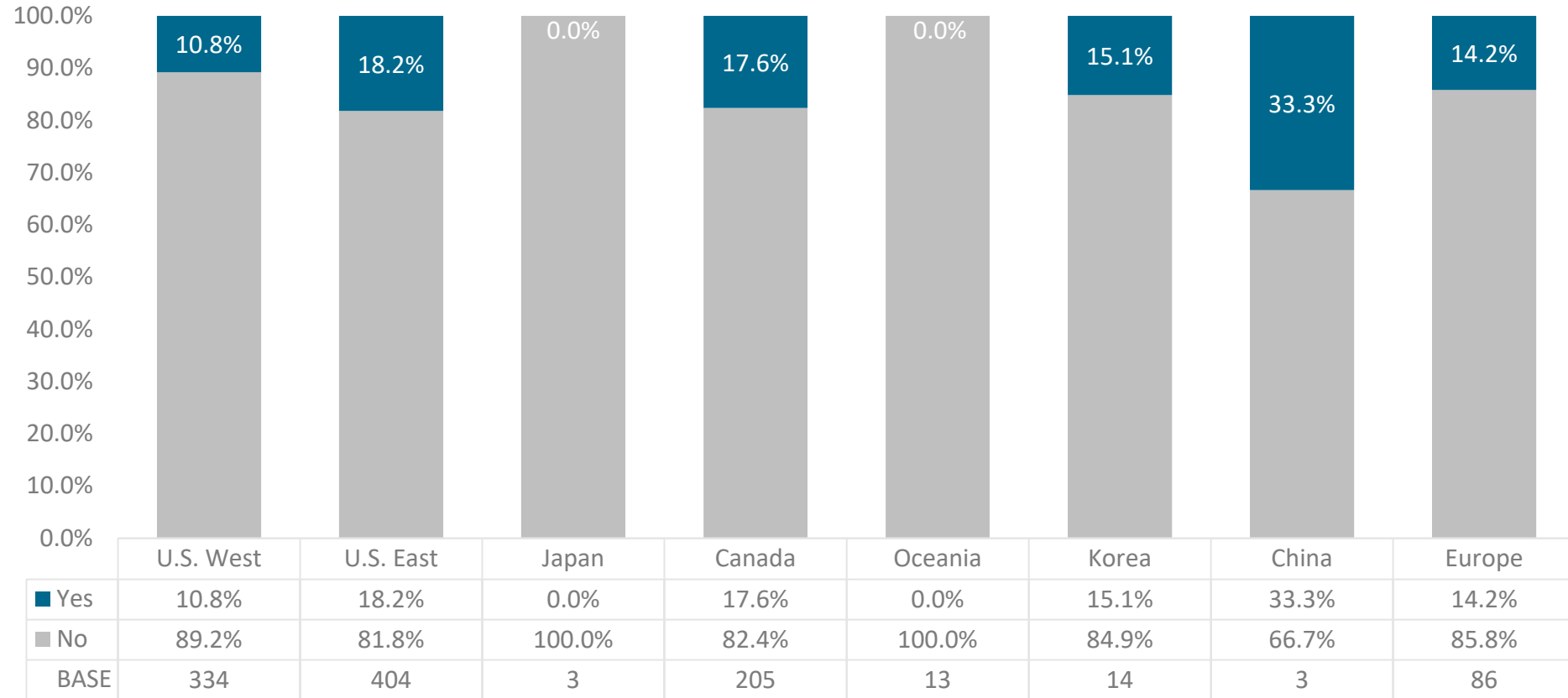
# AIDED ADVERTISING AWARENESS - MAUI



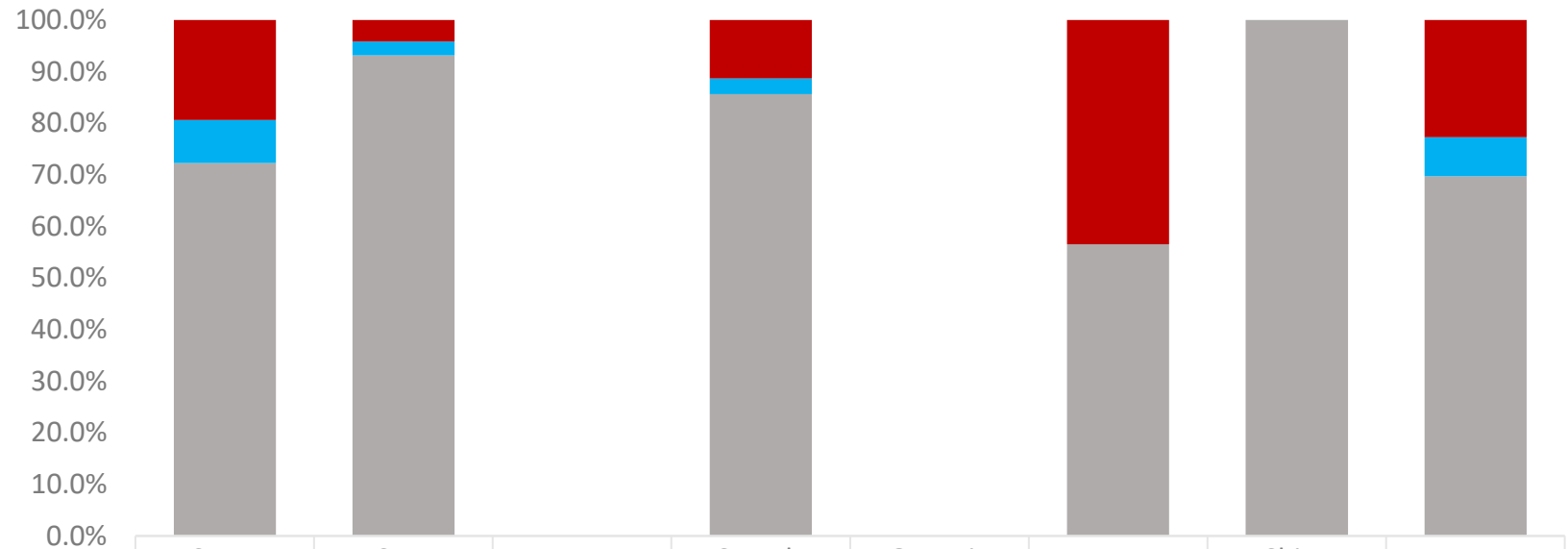
# MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	33.6%	47.0%	73.0%	44.0%	39.2%	58.6%	66.7%	42.8%
<b>Hawaiian cultural events</b>	8.0%	7.8%	36.5%	7.1%	0.0%	0.0%	0.0%	10.8%
<b>Outdoor or sporting activities and events</b>	15.0%	17.2%	36.5%	12.6%	22.8%	0.0%	0.0%	17.1%
<b>Social media posts and videos</b>	11.8%	9.2%	36.5%	12.0%	0.0%	13.2%	33.3%	17.5%
<b>Hawaiian music</b>	7.2%	6.4%	36.5%	4.3%	0.0%	0.0%	0.0%	4.5%
<b>Television programs or movies filmed in Hawai'i</b>	5.2%	6.4%	27.0%	8.4%	6.3%	0.0%	0.0%	6.9%
<b>BASE</b>	348	423	3	211	14	14	3	91

# WAI‘ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE

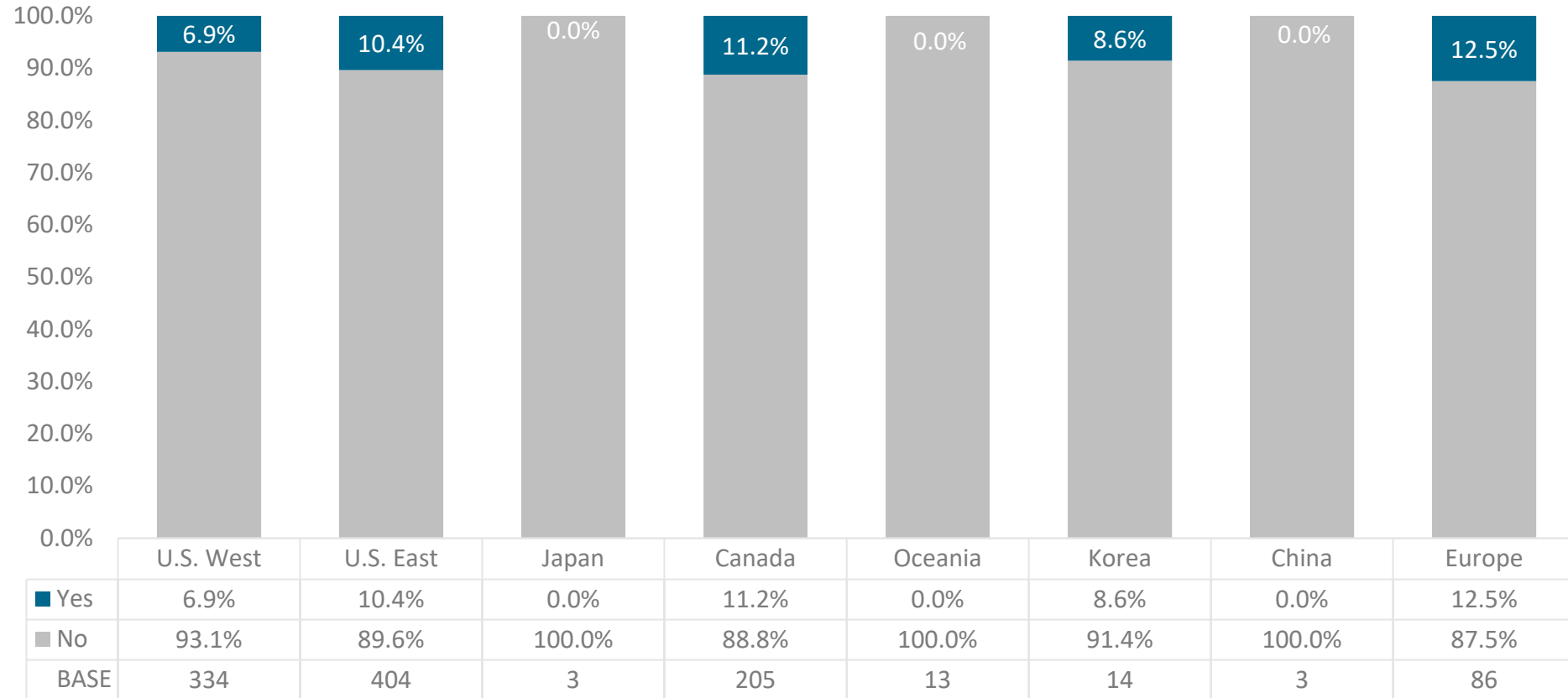


# WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



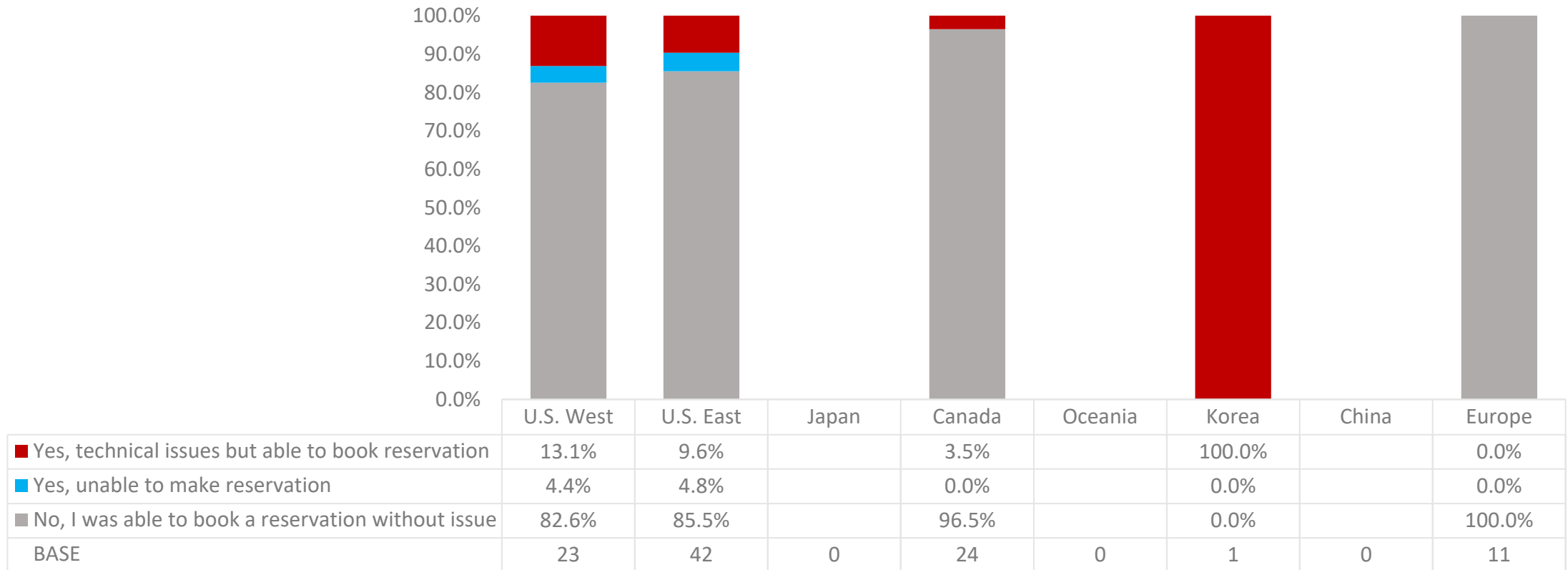
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Yes, technical issues but able to book reservation	19.3%	4.1%		11.3%		43.5%	0.0%	22.7%
Yes, unable to make reservation	8.4%	2.7%		3.0%		0.0%	0.0%	7.6%
No, I was able to book a reservation without issue	72.3%	93.2%		85.6%		56.5%	100.0%	69.7%
BASE	36	74	0	37	0	2	1	13

# 'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE

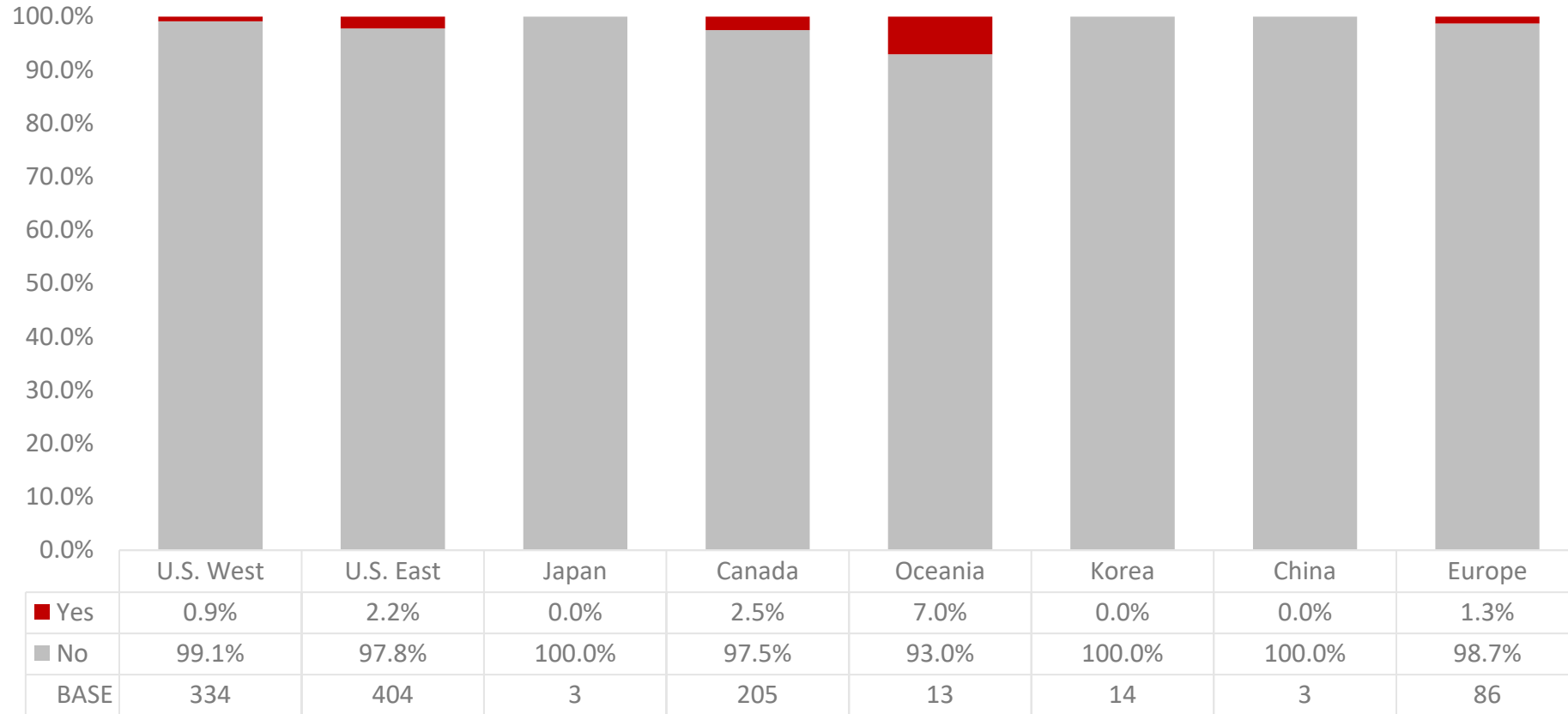




# 'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



# VISITED MAUI FOR SPECIFIC EVENT



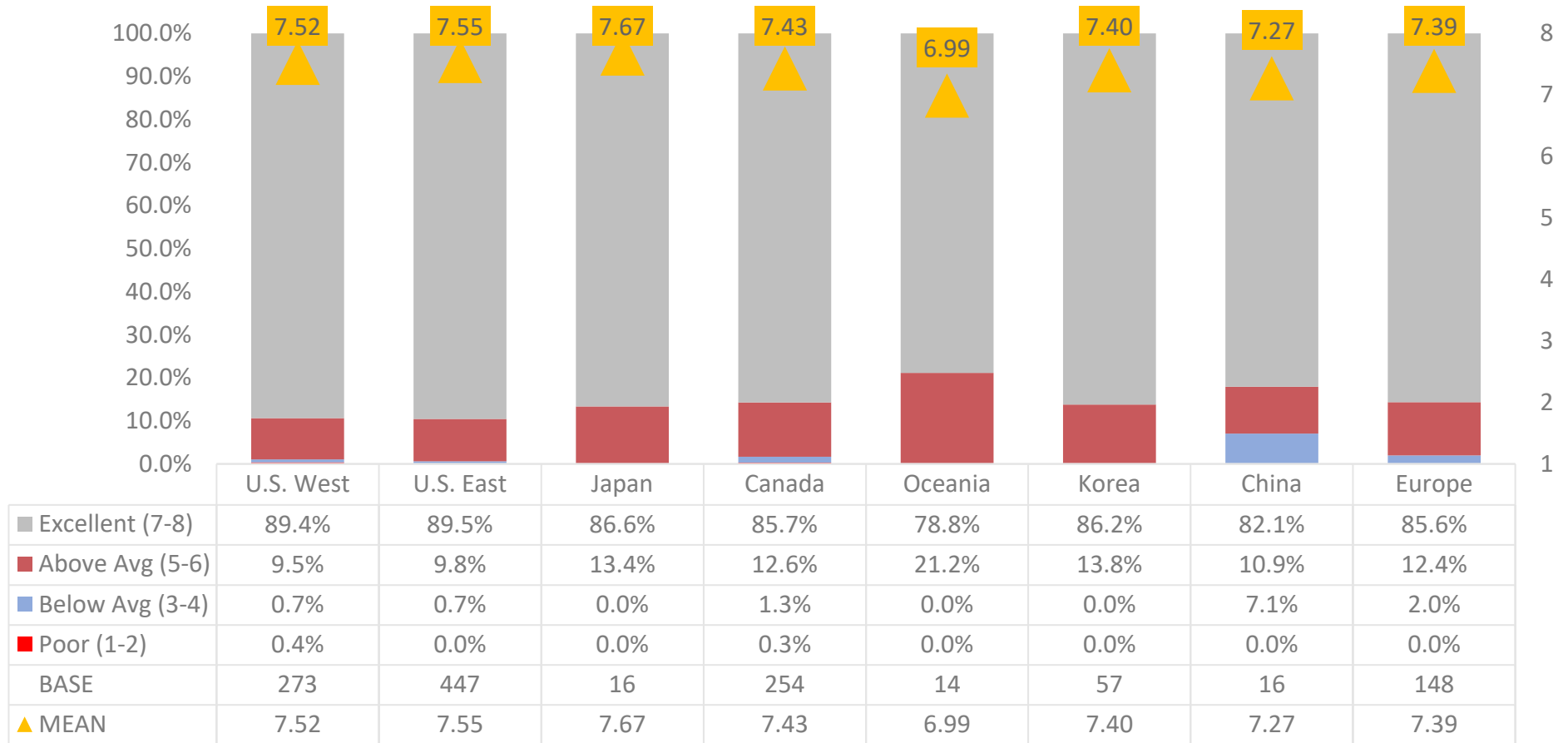
# VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Sentry Tournament of Golf Champions</b>	33.3%	33.2%	0.0%	42.3%	100.0%	0.0%	0.0%	0.0%
<b>Maui Marathon</b>	33.3%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Other Festival/concert</b>	33.3%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Convention/ Conference/ Retreat/ Seminar/ Meeting/ Workshop/ Training/ Work event</b>	0.0%	0.0%	0.0%	36.6%	0.0%	0.0%	0.0%	100.0%
<b>Other sporting event</b>	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Whale Watching</b>	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Wedding/ Honeymoon/ Anniversary/ Birthday/ Funeral/ Graduation</b>	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Other (please specify festival/event name)</b>	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Hawaii Food and Wine Festival</b>	0.0%	0.0%	0.0%	21.1%	0.0%	0.0%	0.0%	0.0%
<b>Total</b>	3	9	0	5	1	0	0	1

# Section 8 – Island of Hawai‘i

# SATISFACTION - ISLAND OF HAWAI‘I

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



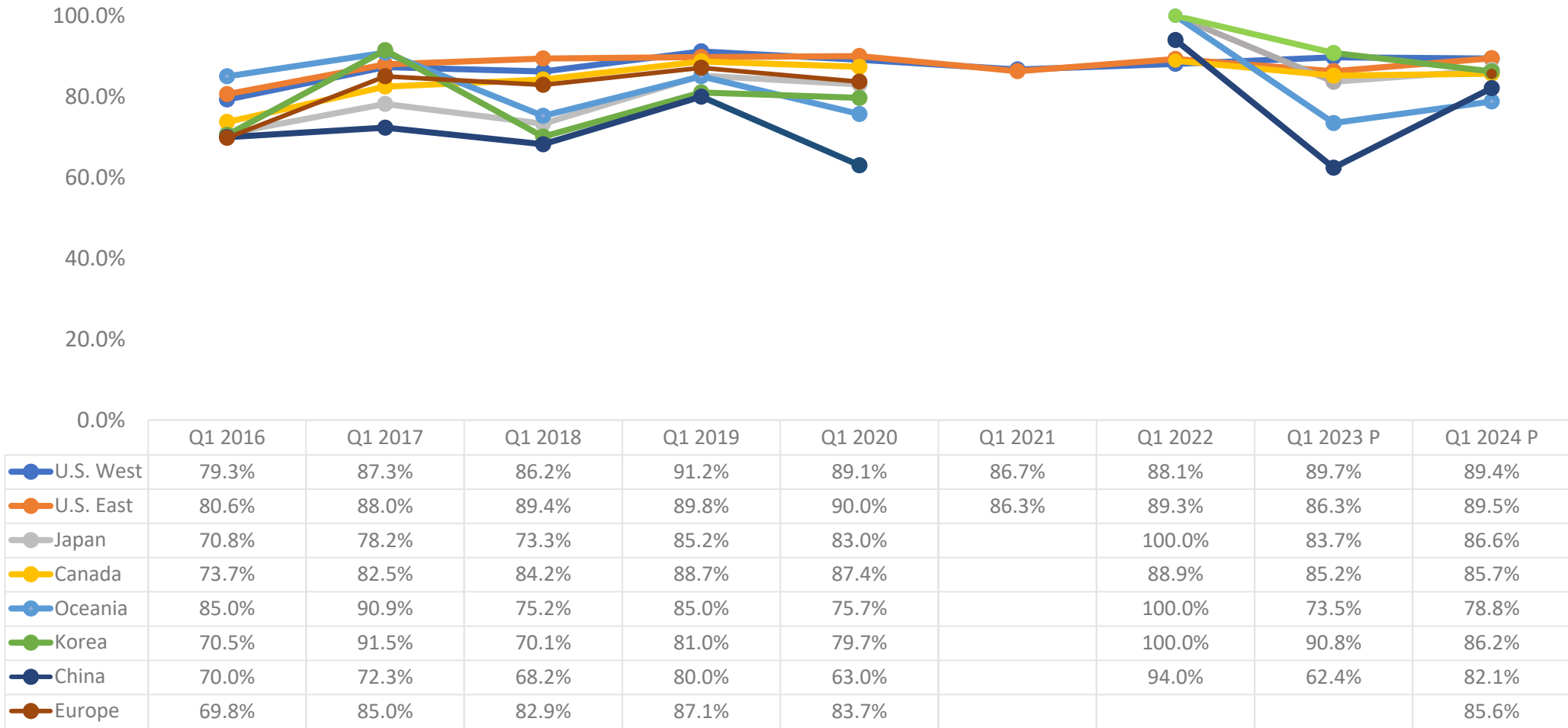
# SATISFACTION - ISLAND OF HAWAI'I

- **Gender:** Females from **U.S. West** gave higher satisfaction scores than males.
- **Islands visited:** Travelers from **U.S. West** whose trip was limited to visiting only the Island of Hawai'i were more satisfied with their stay on island compared to those who visited multiple islands during their stay.
- **Household Income:** Visitors from **U.S. West** who reside in homes in the bottom income tier (<\$100K) gave higher satisfaction scores.

# SATISFACTION - ISLAND OF HAWAI‘I

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

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



P= Preliminary Data

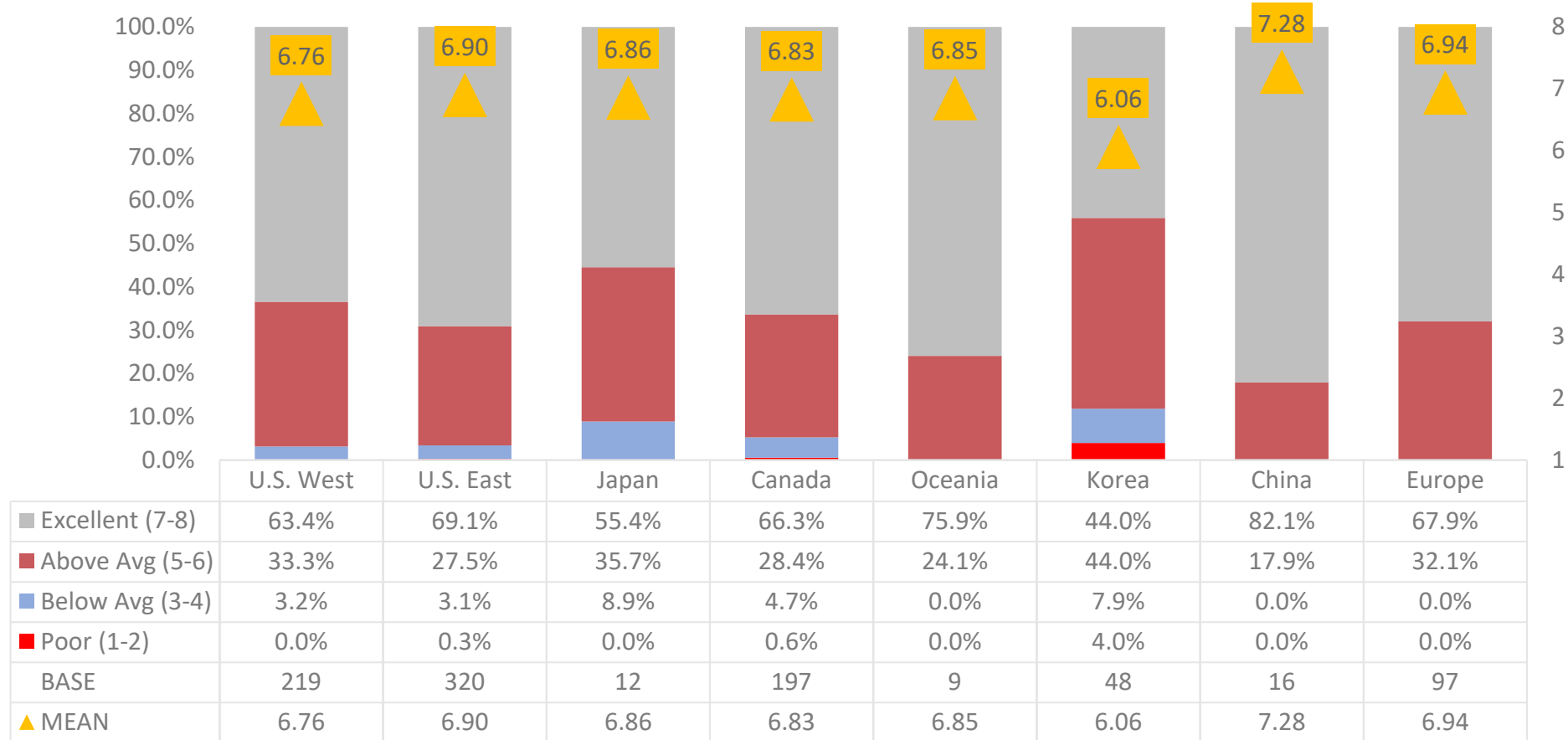
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on\_\_\_?

Note: 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. Please review data with caution. Visitors from Europe were not surveyed from 2021 through 2023.



# ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

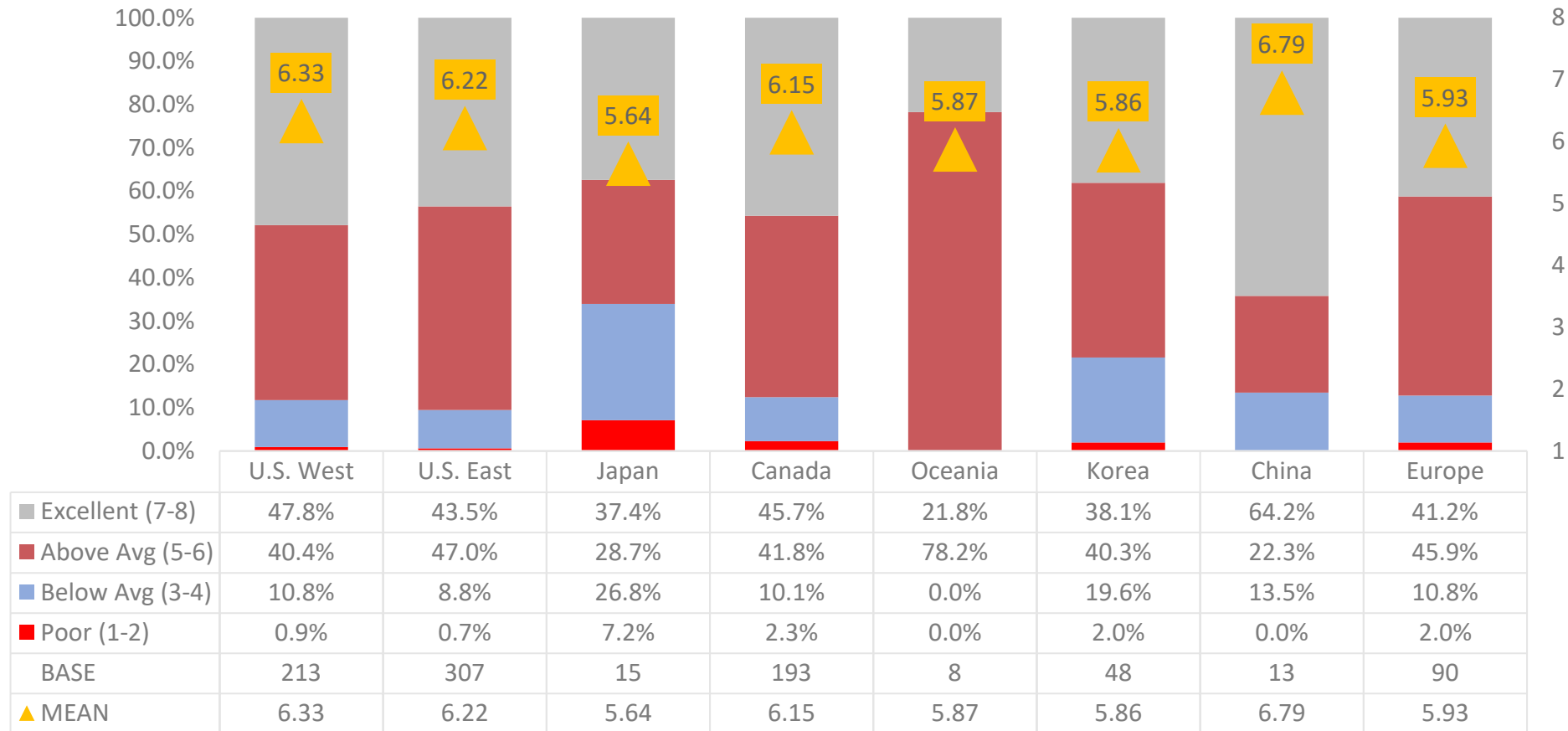
8-pt Rating Scale  
8 = Excellent / 1 = Poor





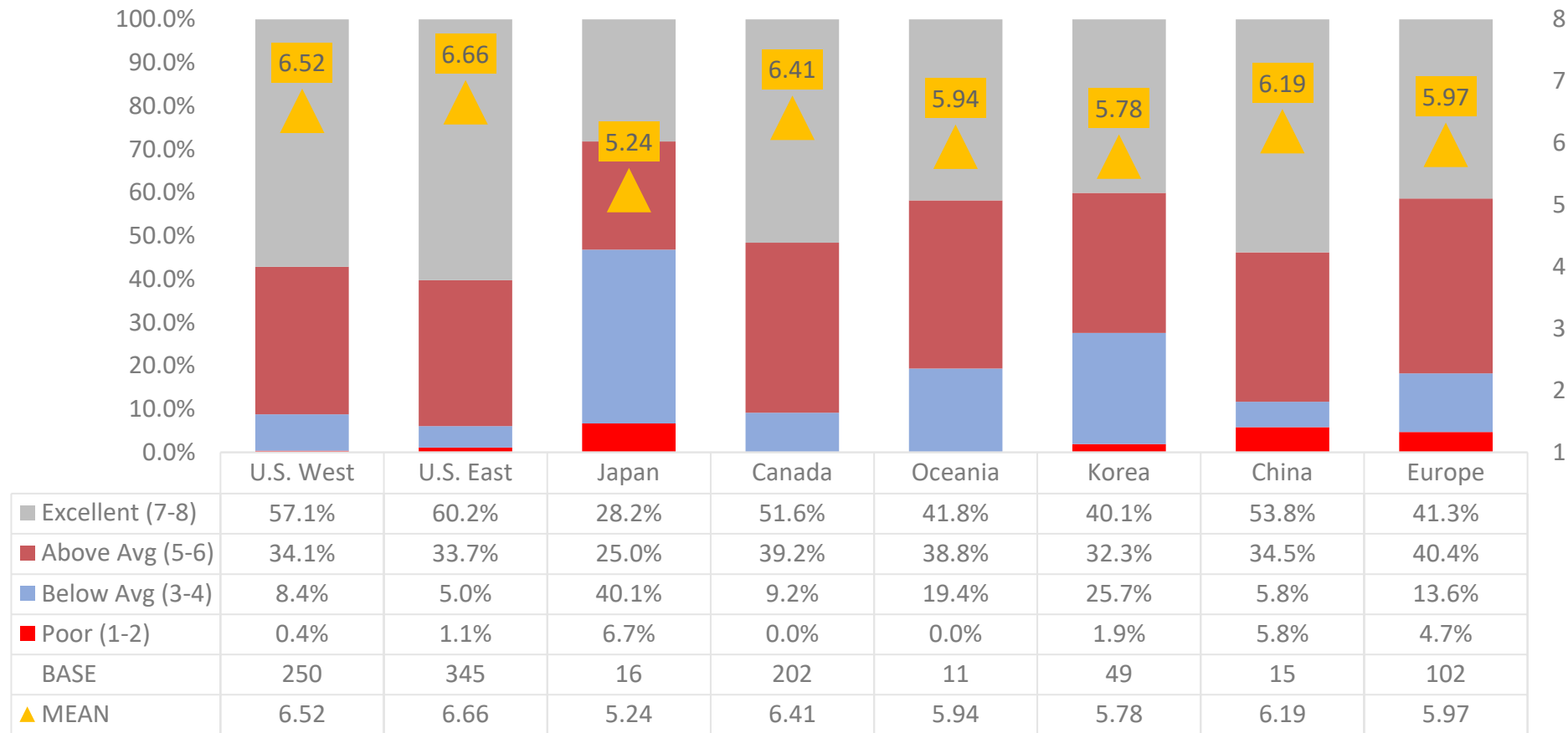
# SHOPPING - ISLAND OF HAWAI'I

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



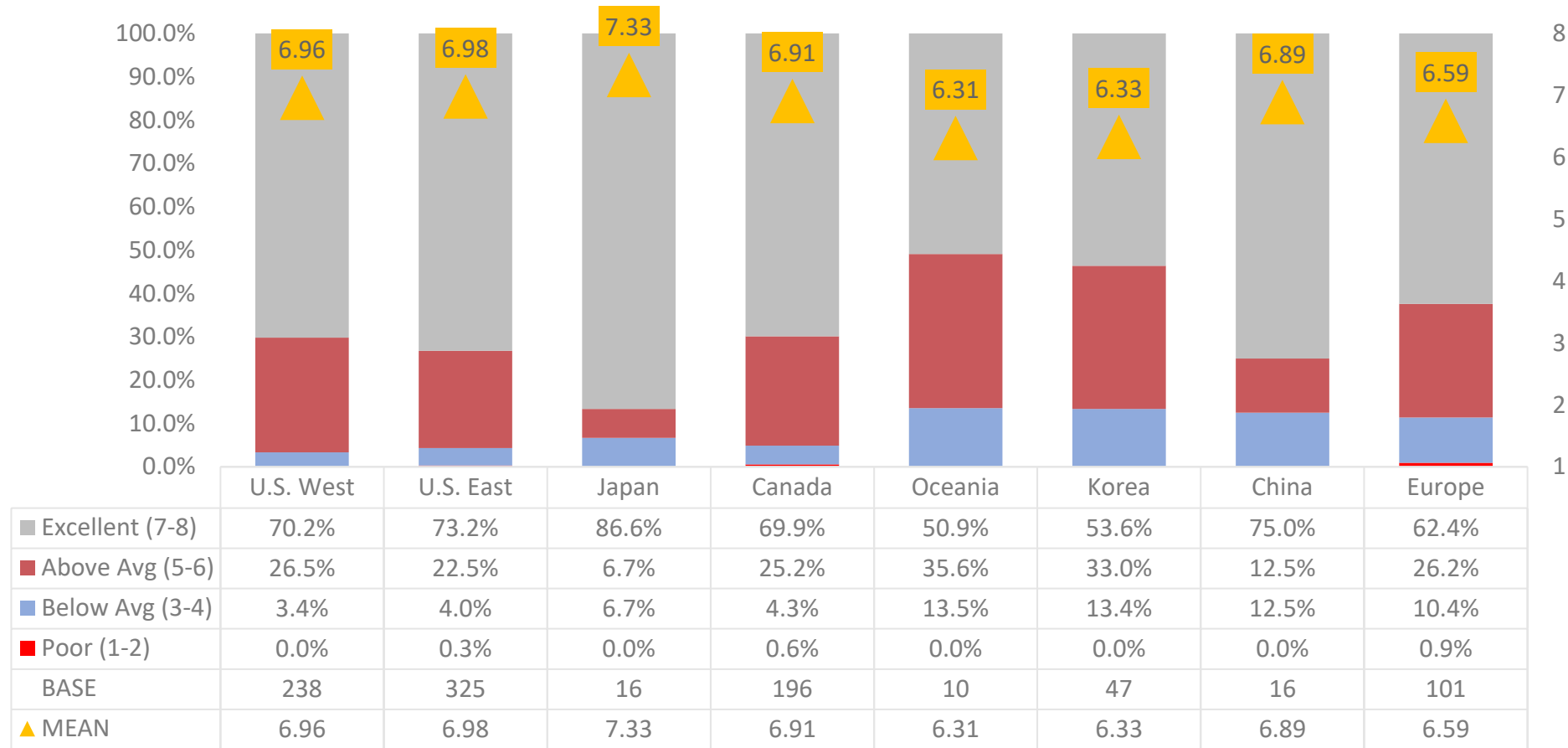
# DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



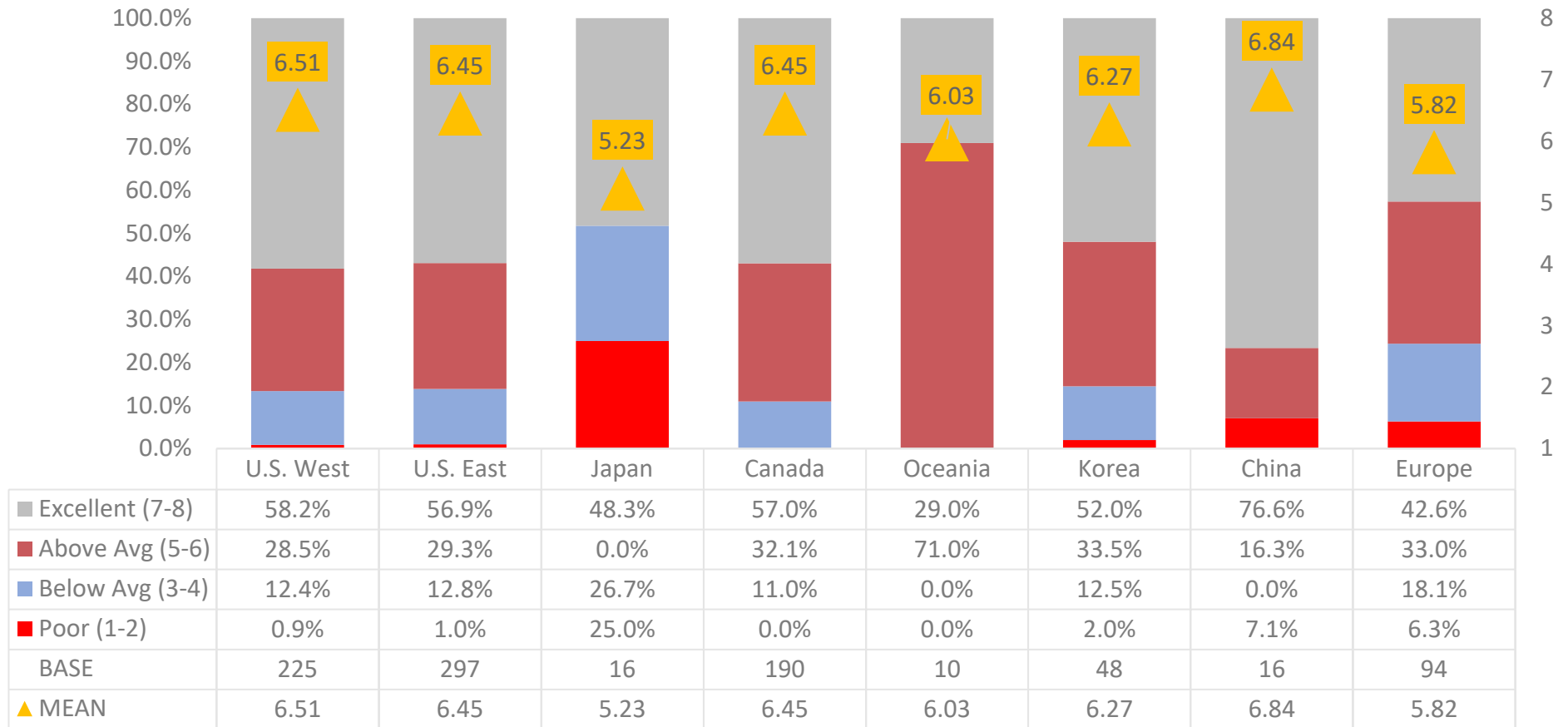
# LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



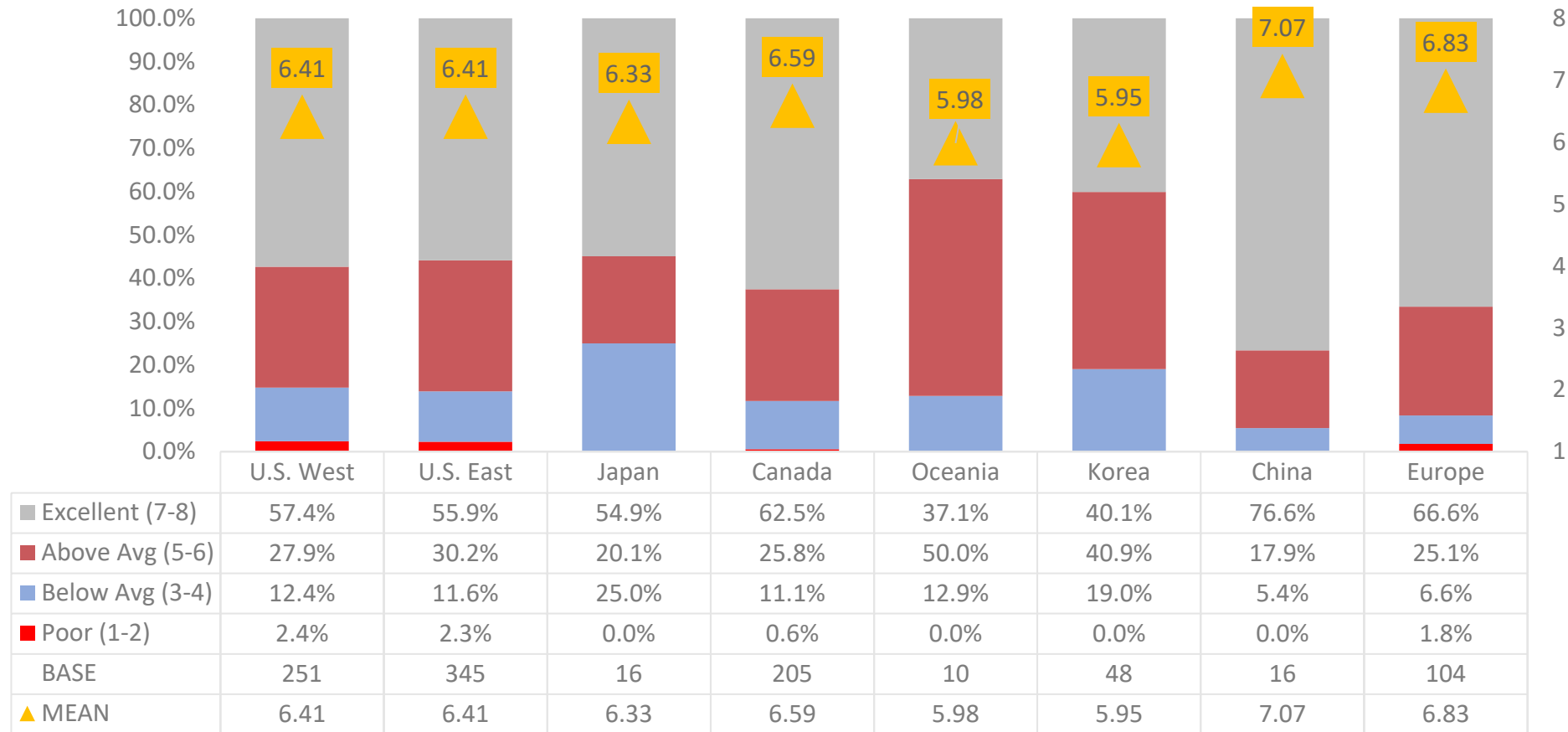
# TRANSPORTATION ON ISLAND - ISLAND OF HAWAI‘I

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



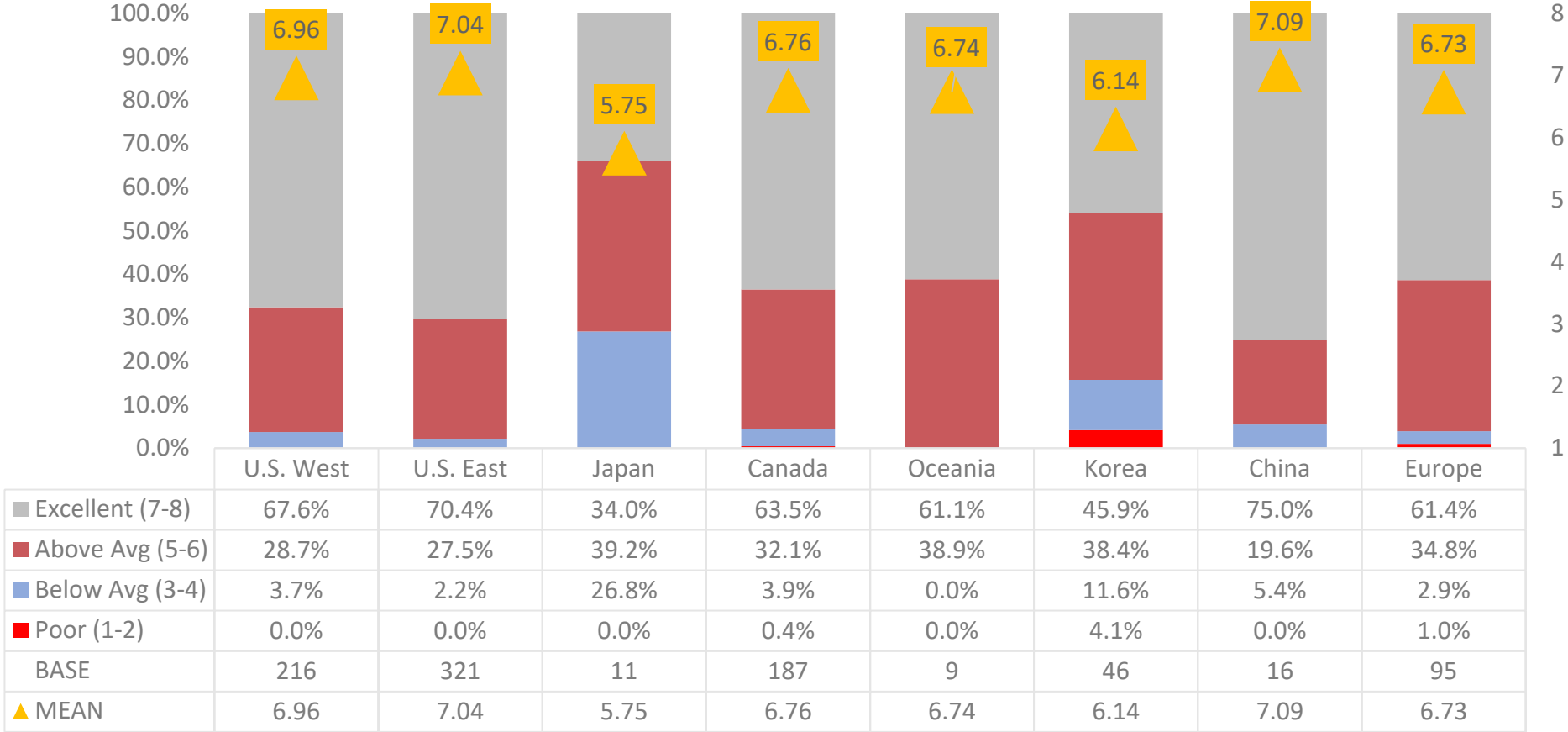
# AIRPORT- ISLAND OF HAWAI'I

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



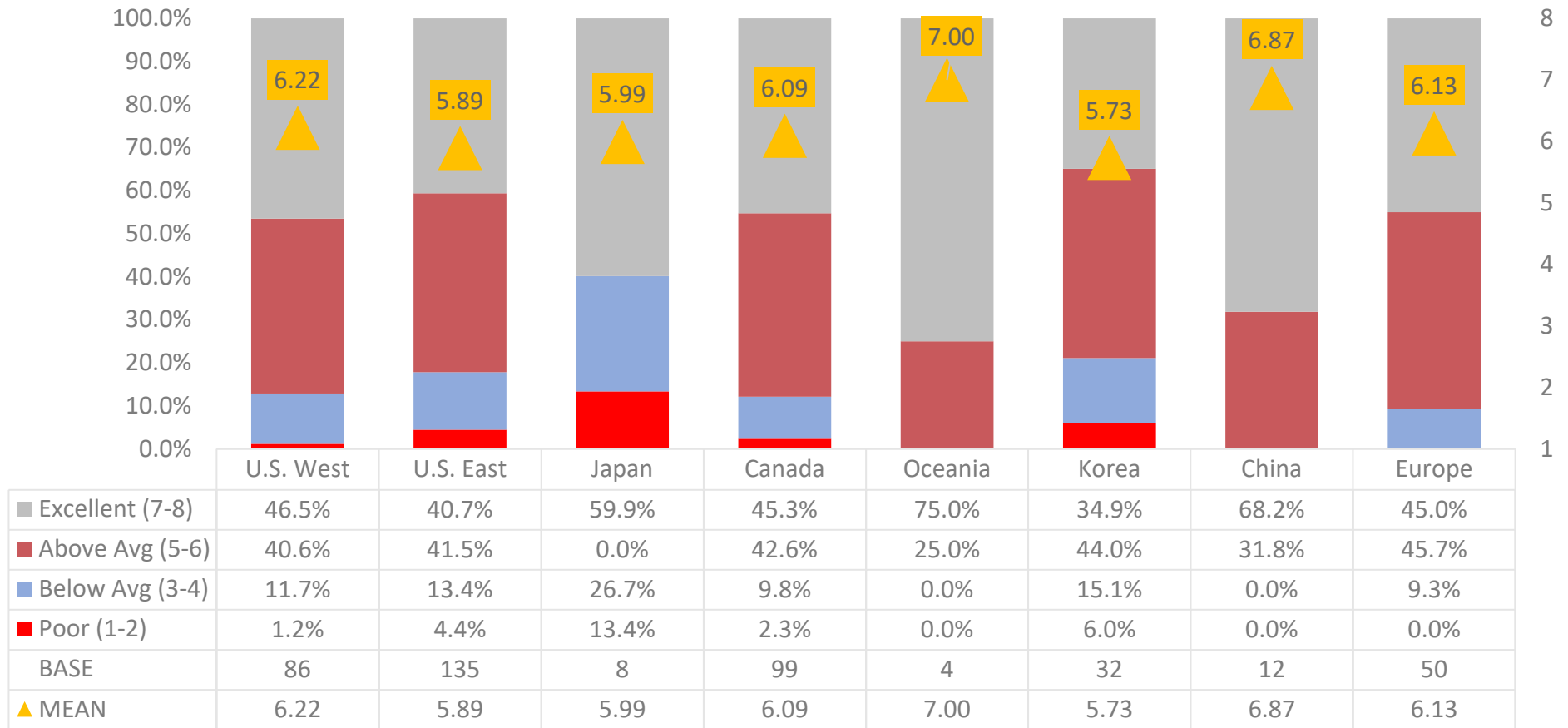
# CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



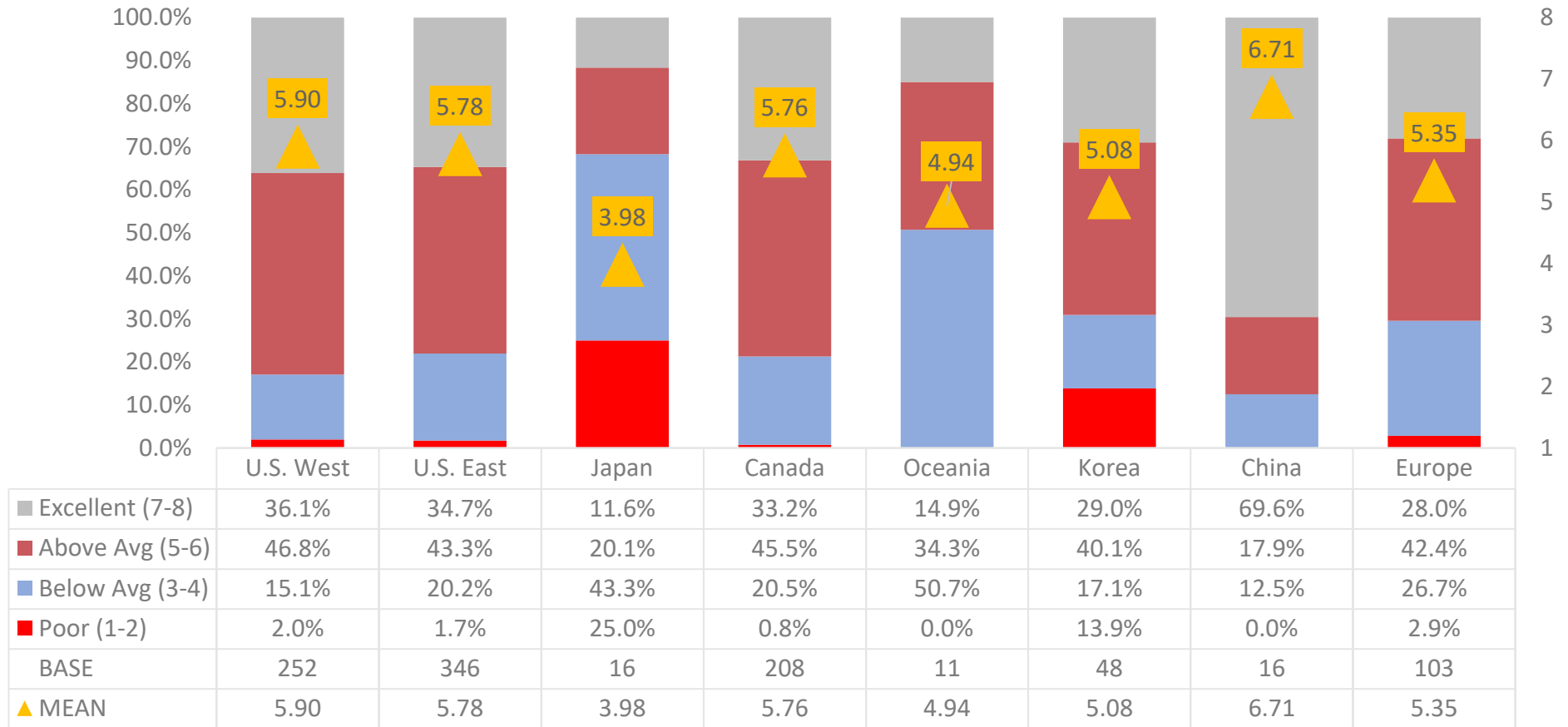
# VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



# VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

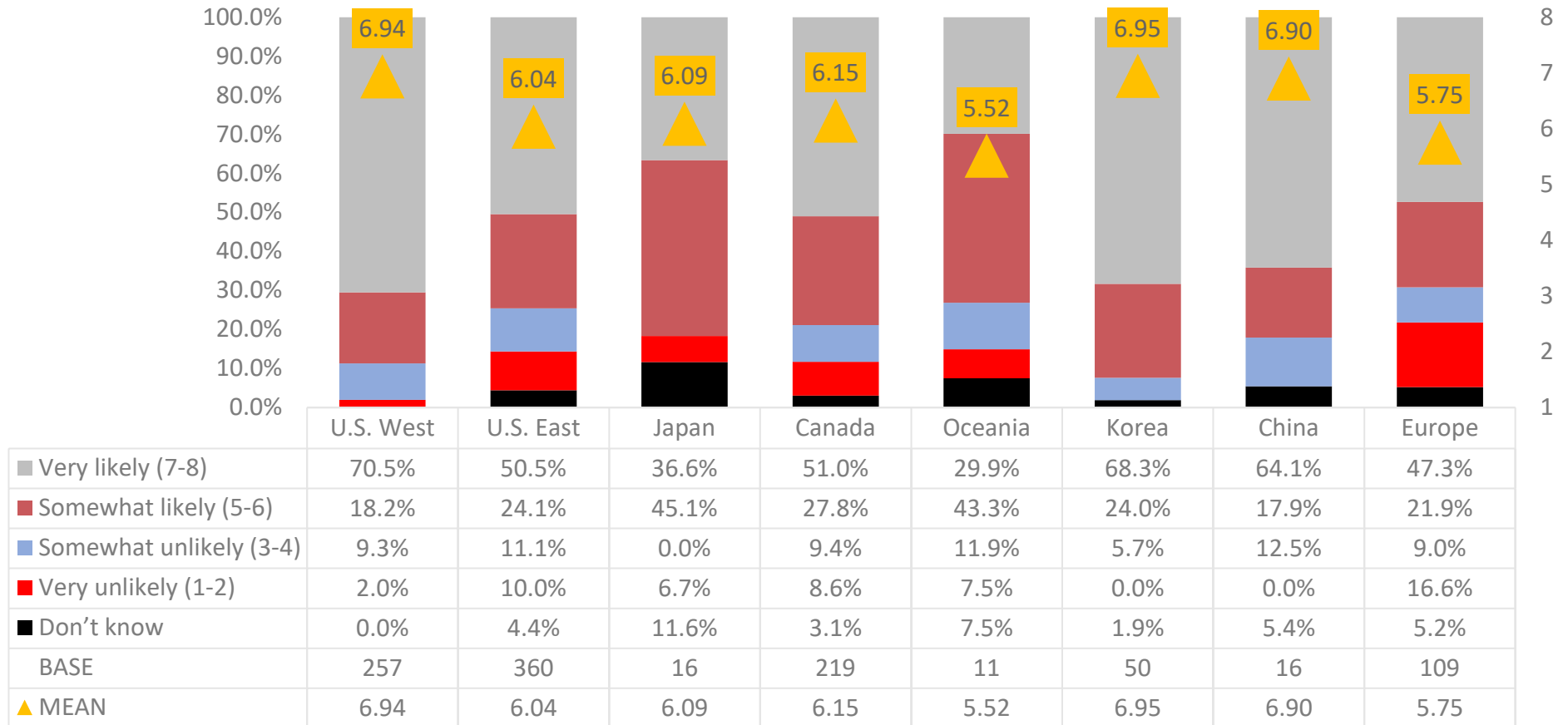
8-pt Rating Scale  
8 = Excellent / 1 = Poor





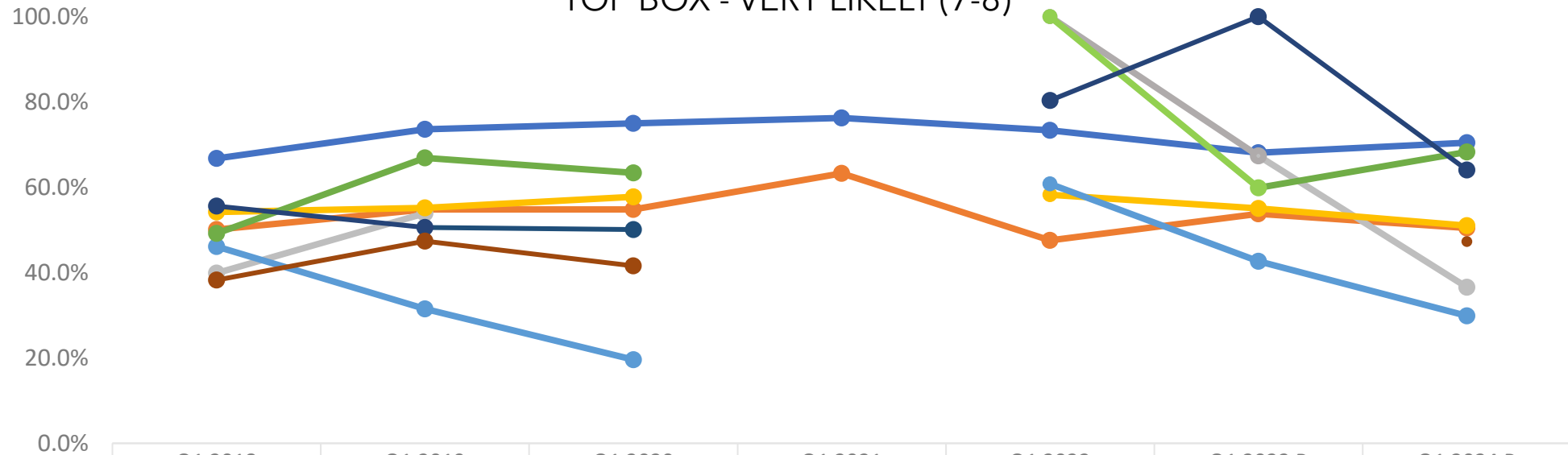
# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

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



# LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

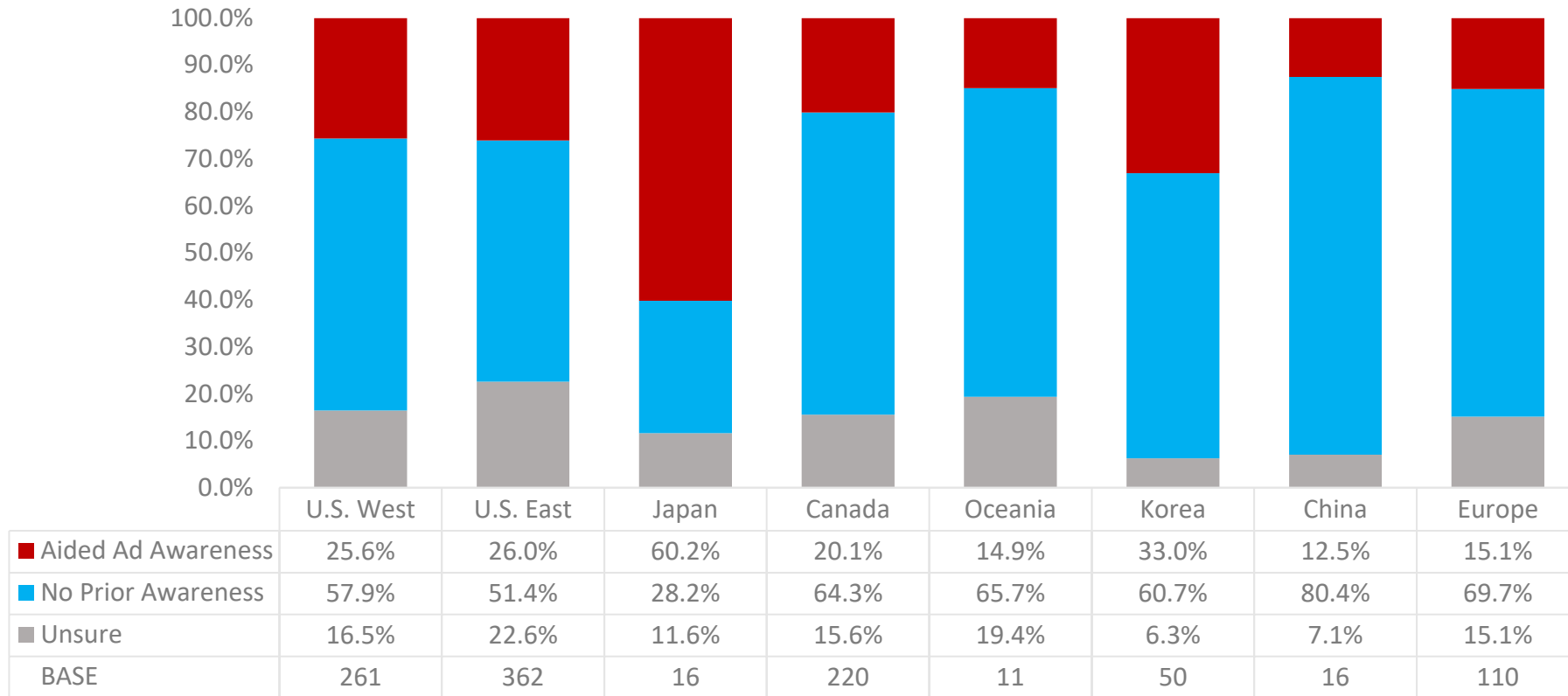


	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022	Q1 2023 P	Q1 2024 P
U.S. West	66.8%	73.6%	75.0%	76.3%	73.4%	68.1%	70.5%
U.S. East	50.1%	54.8%	54.8%	63.3%	47.6%	53.8%	50.5%
Japan	39.9%	53.9%	52.8%		100.0%	67.4%	36.6%
Canada	54.2%	55.2%	57.8%		58.3%	55.1%	51.0%
Oceania	46.1%	31.5%	19.6%		60.8%	42.7%	29.9%
Korea	49.2%	66.9%	63.4%		100.0%	59.9%	68.3%
China	55.6%	50.6%	50.1%		80.4%	100.0%	64.1%
Europe	38.3%	47.4%	41.6%				47.3%

P= Preliminary Data

Q. How likely are you to visit the island of Hawai'i again in the next five years?

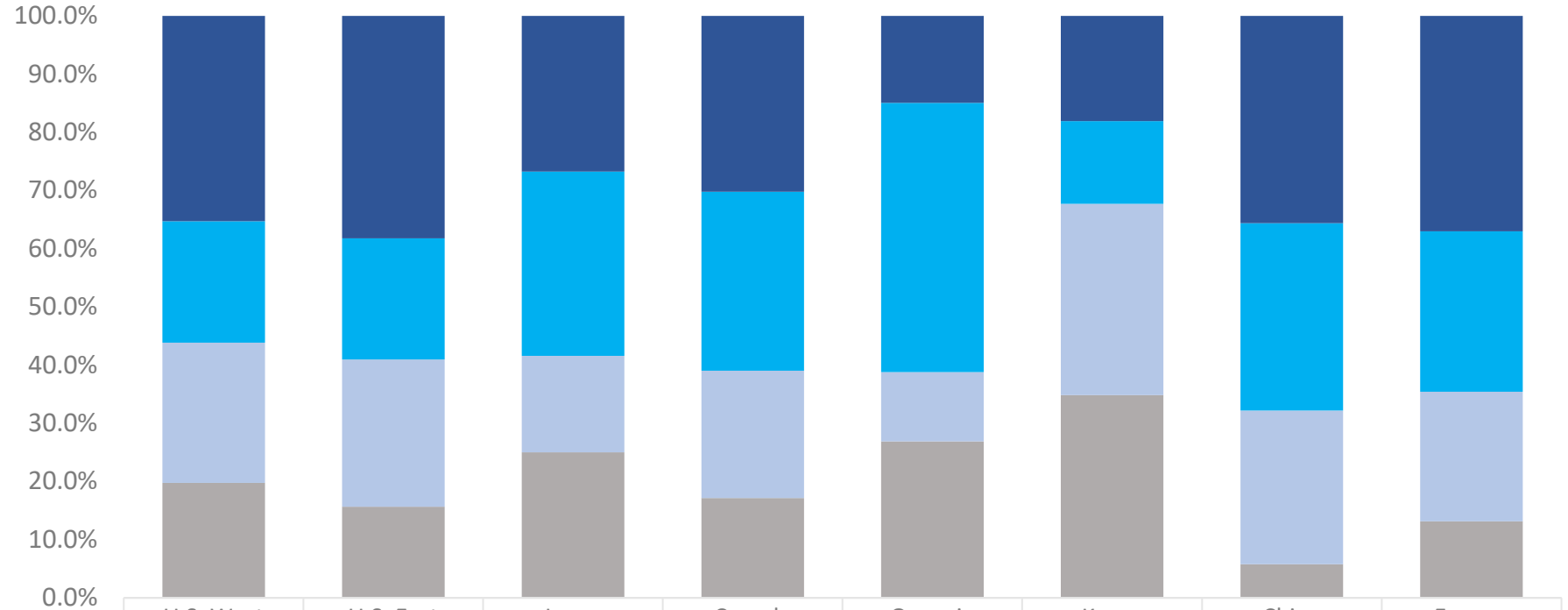
# AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



# MOTIVATING FACTORS - ISLAND OF HAWAI'I

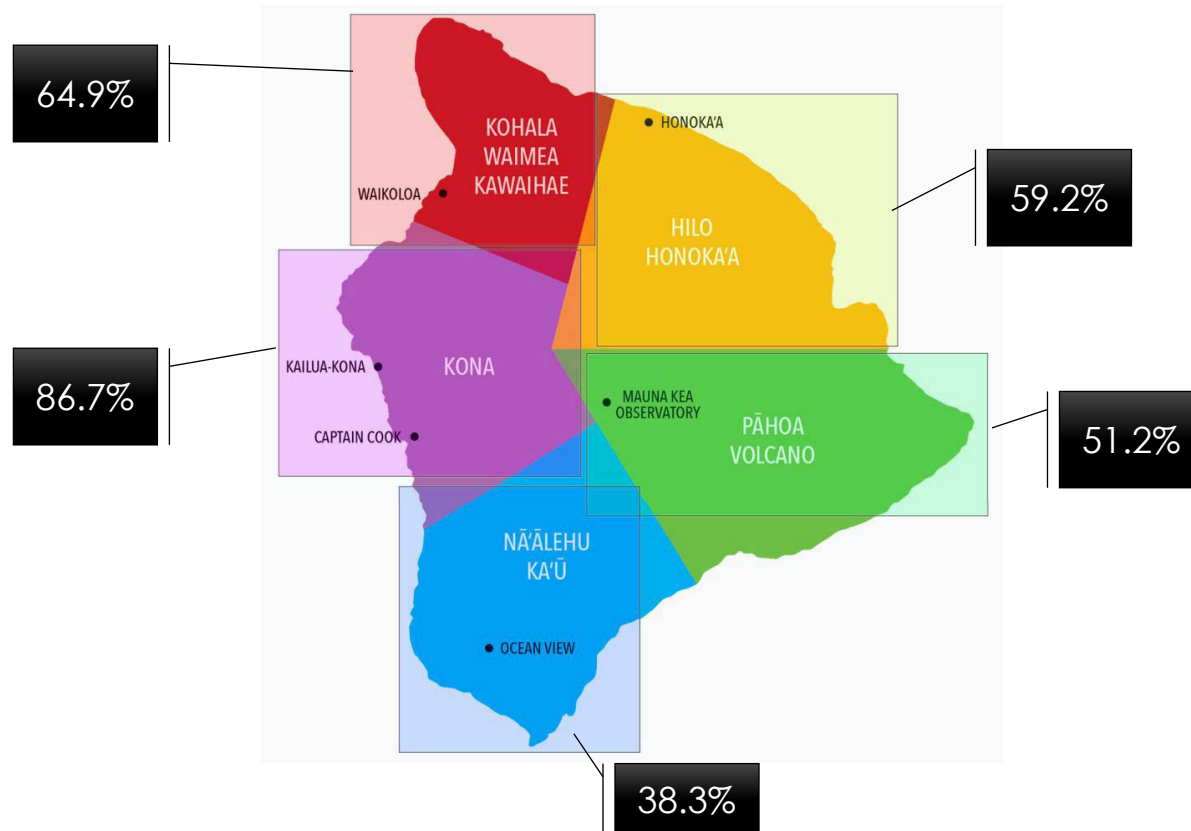
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
<b>Famous landmarks or imagery/ natural beauty</b>	50.2%	57.7%	51.7%	45.9%	58.2%	65.1%	75.0%	54.4%
<b>Outdoor or sporting activities and events</b>	17.2%	13.0%	25.0%	14.3%	7.5%	8.2%	14.1%	17.1%
<b>Hawaiian cultural events</b>	10.7%	11.6%	0.0%	9.7%	0.0%	1.9%	12.5%	7.4%
<b>Social media posts and videos</b>	9.9%	9.1%	11.6%	11.4%	14.9%	15.3%	12.5%	11.4%
<b>Television programs or movies filmed in Hawai'i</b>	5.0%	6.3%	29.9%	8.1%	0.0%	7.6%	0.0%	13.1%
<b>Hawaiian music</b>	7.7%	8.0%	6.7%	4.3%	7.5%	1.9%	0.0%	9.6%
<b>BASE</b>	261	362	16	220	11	50	16	110

# TRAVEL ON ISLAND OF HAWAI'I

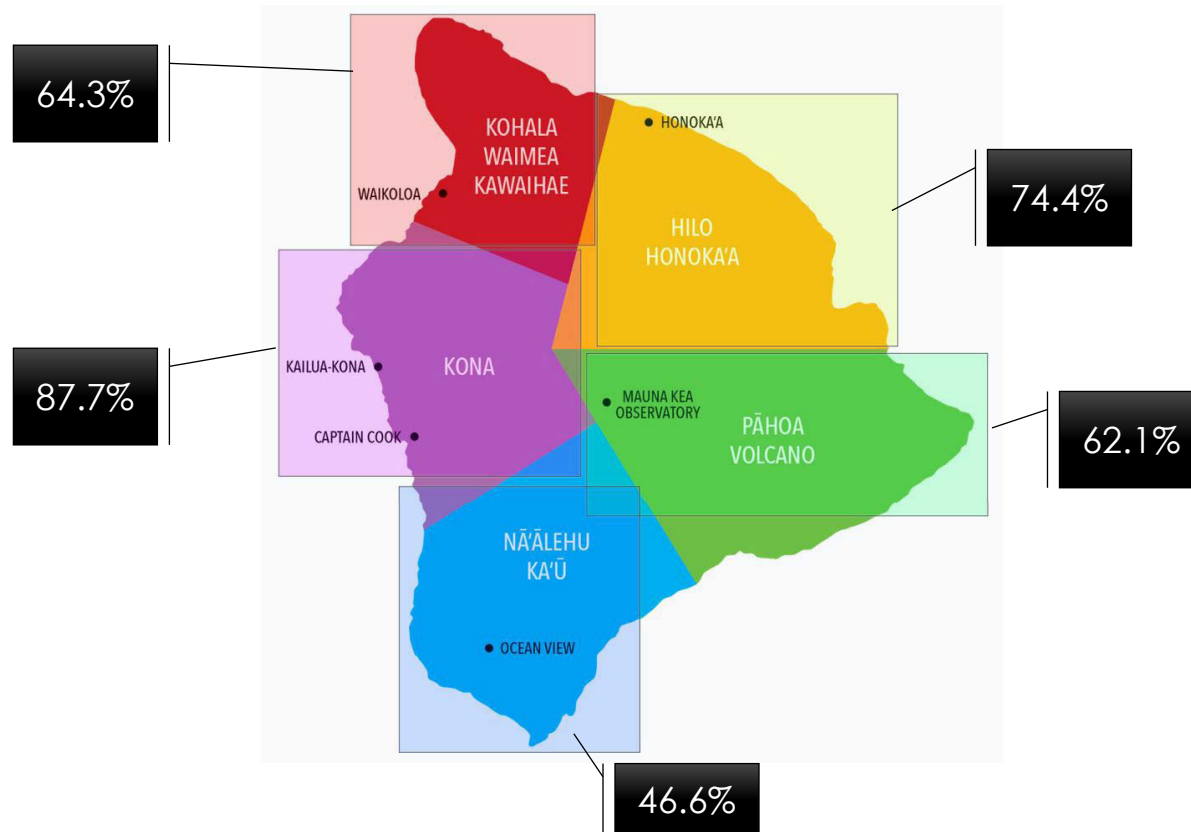


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Traveled to other side of island	35.3%	38.2%	26.7%	30.2%	14.9%	18.1%	35.6%	37.0%
Traveled more than 1 hour one way to reach activities	20.9%	20.8%	31.7%	30.7%	46.3%	14.2%	32.2%	27.6%
Traveled 1 hour or less one way to reach activity	24.1%	25.3%	16.6%	21.9%	11.9%	32.9%	26.4%	22.2%
Enjoy activities- short drive from accommodations	19.7%	15.6%	25.0%	17.1%	26.9%	34.8%	5.7%	13.2%
BASE	249	345	16	205	11	49	15	100

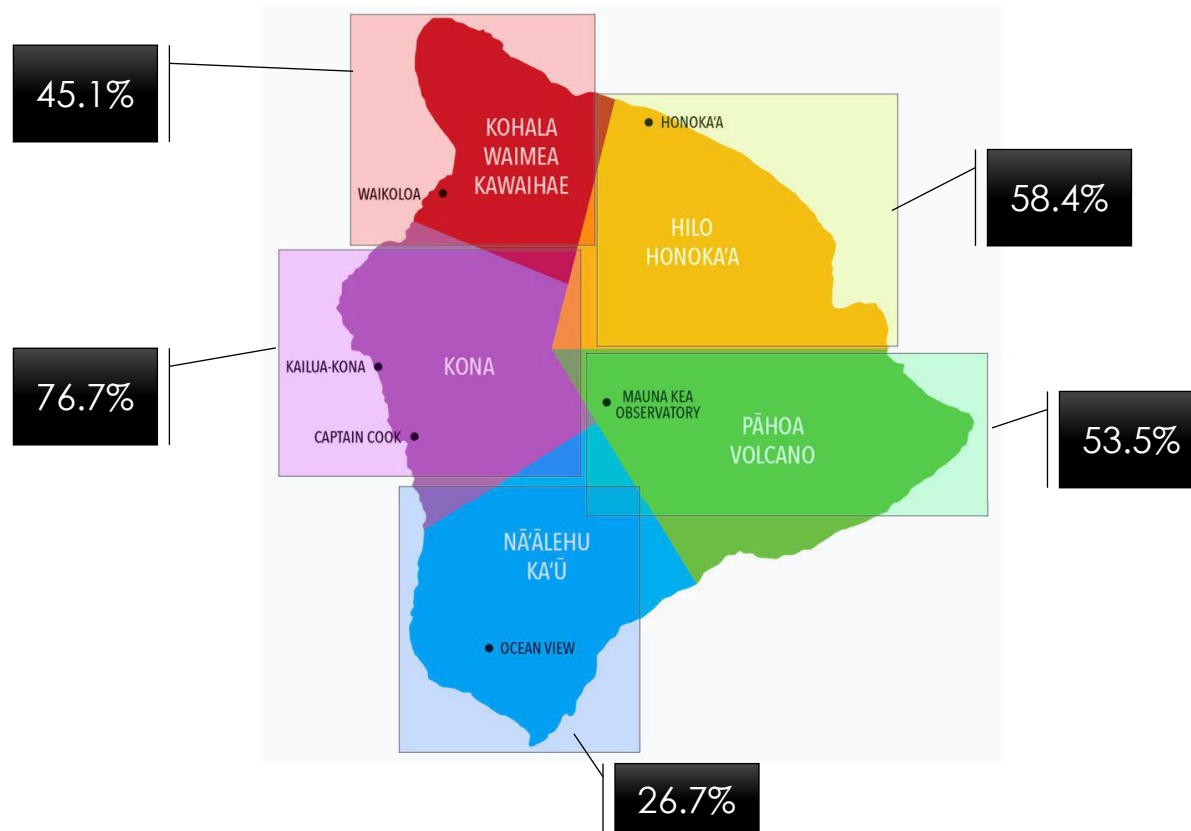
# AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



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

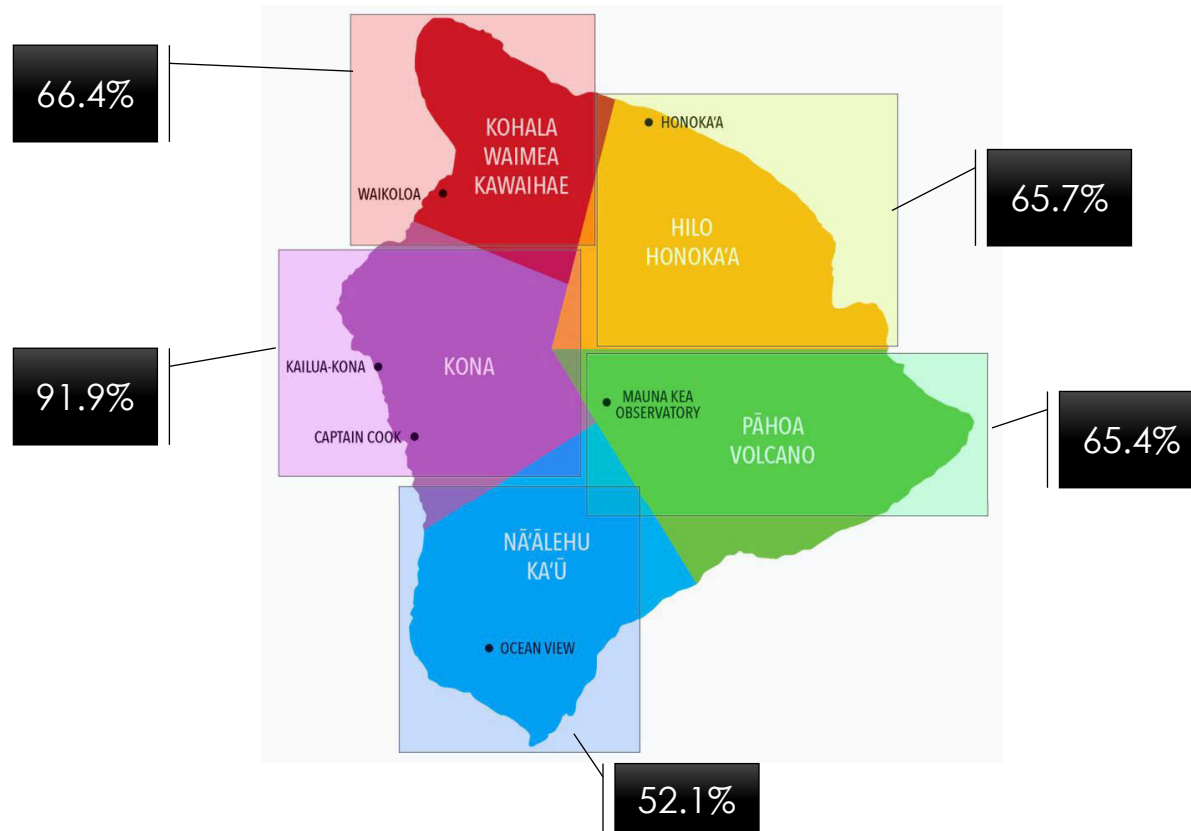


# AREAS VISITED ISLAND OF HAWAI'I JAPAN

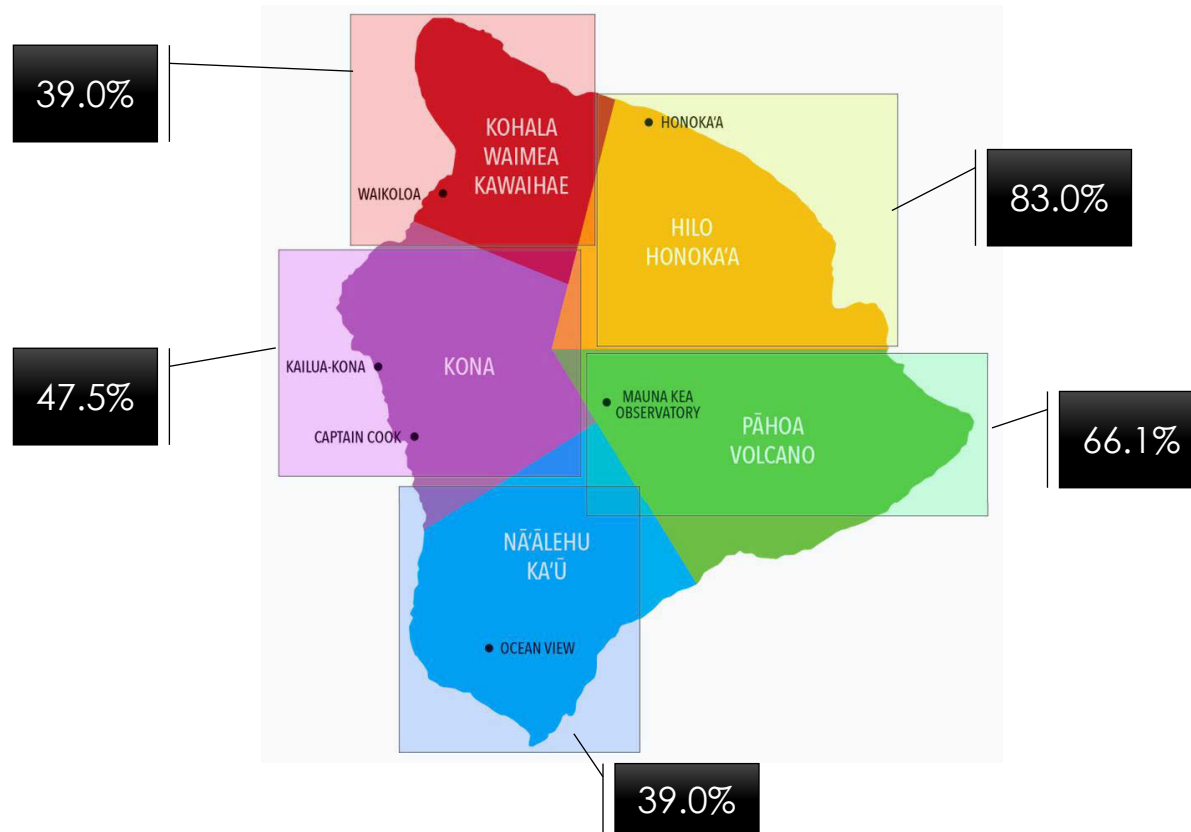




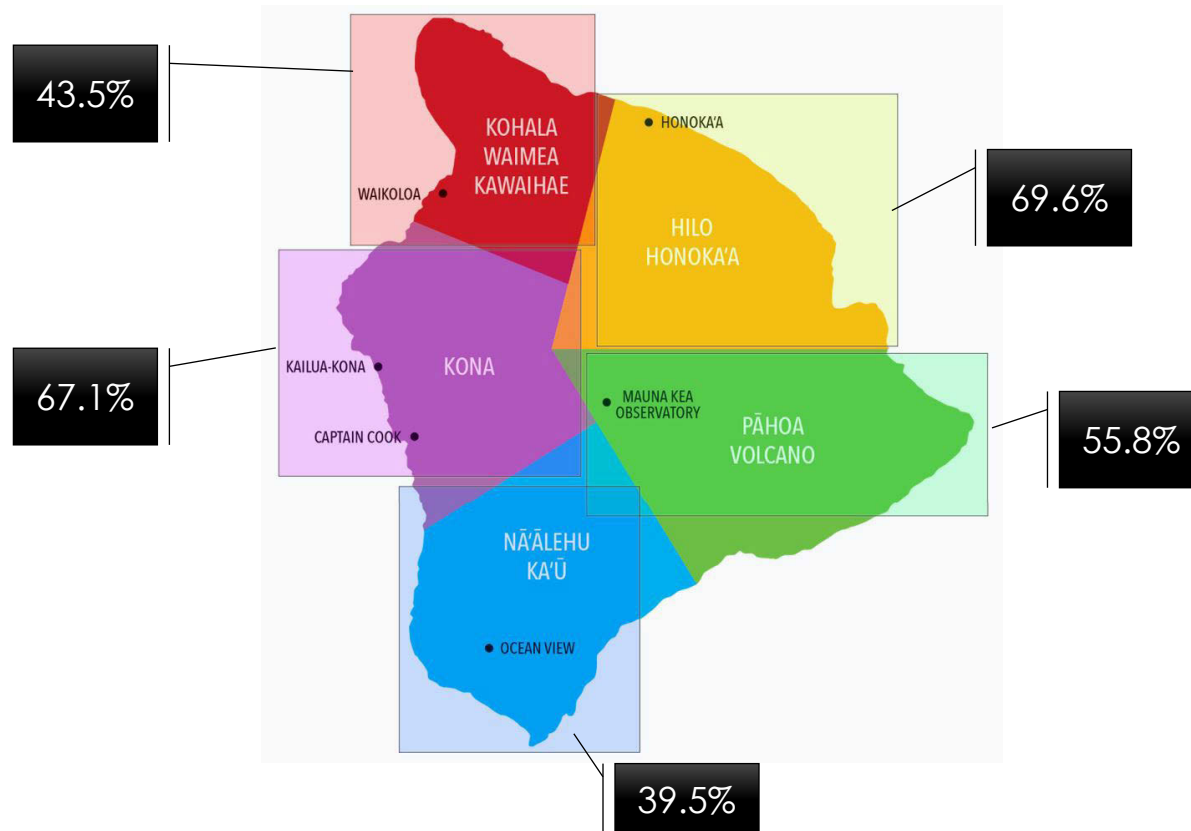
# AREAS VISITED ISLAND OF HAWAI'I CANADA



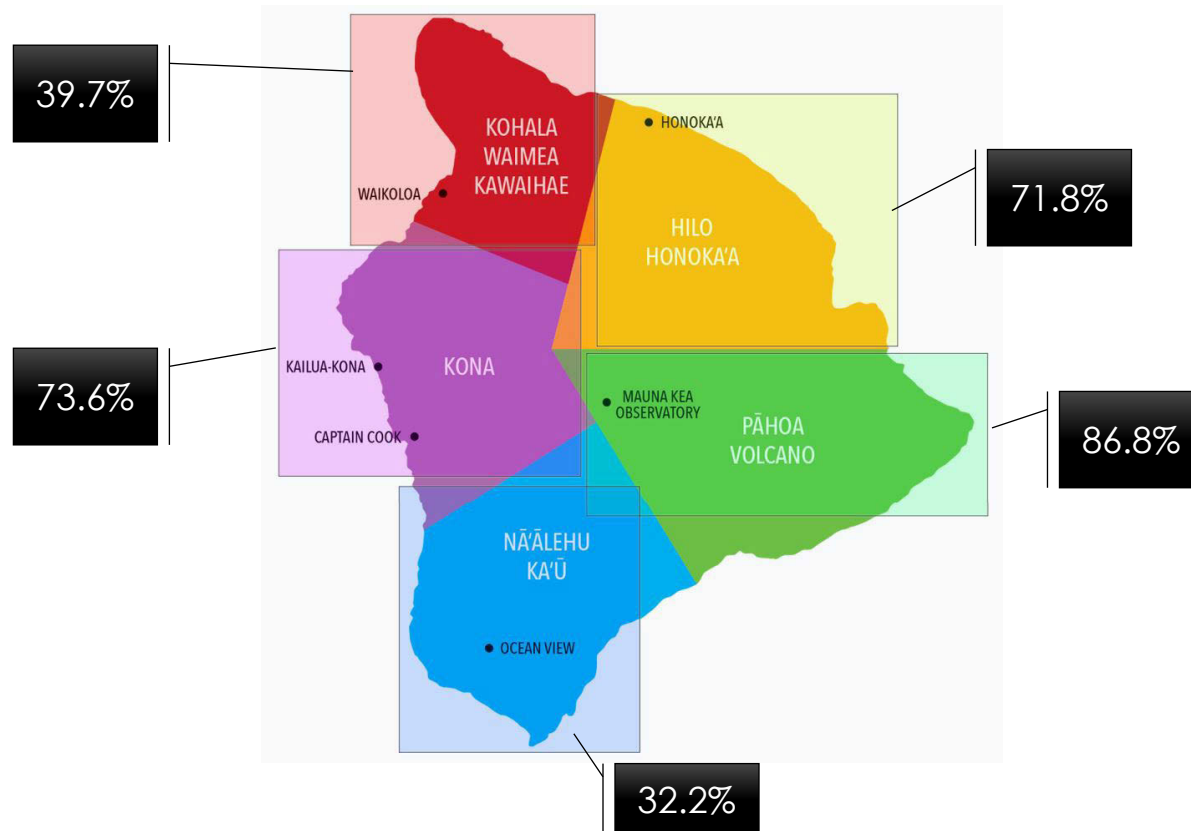
# AREAS VISITED ISLAND OF HAWAI'I OCEANIA



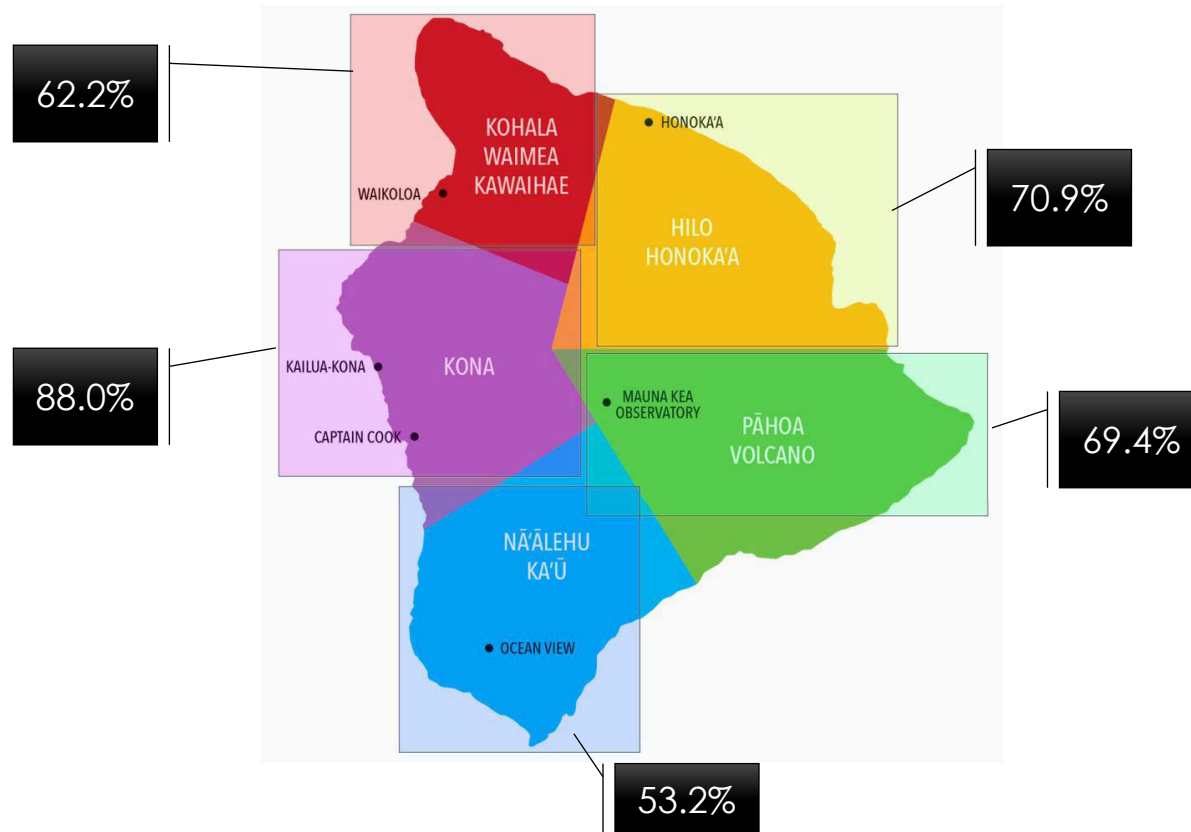
# AREAS VISITED ISLAND OF HAWAI'I KOREA



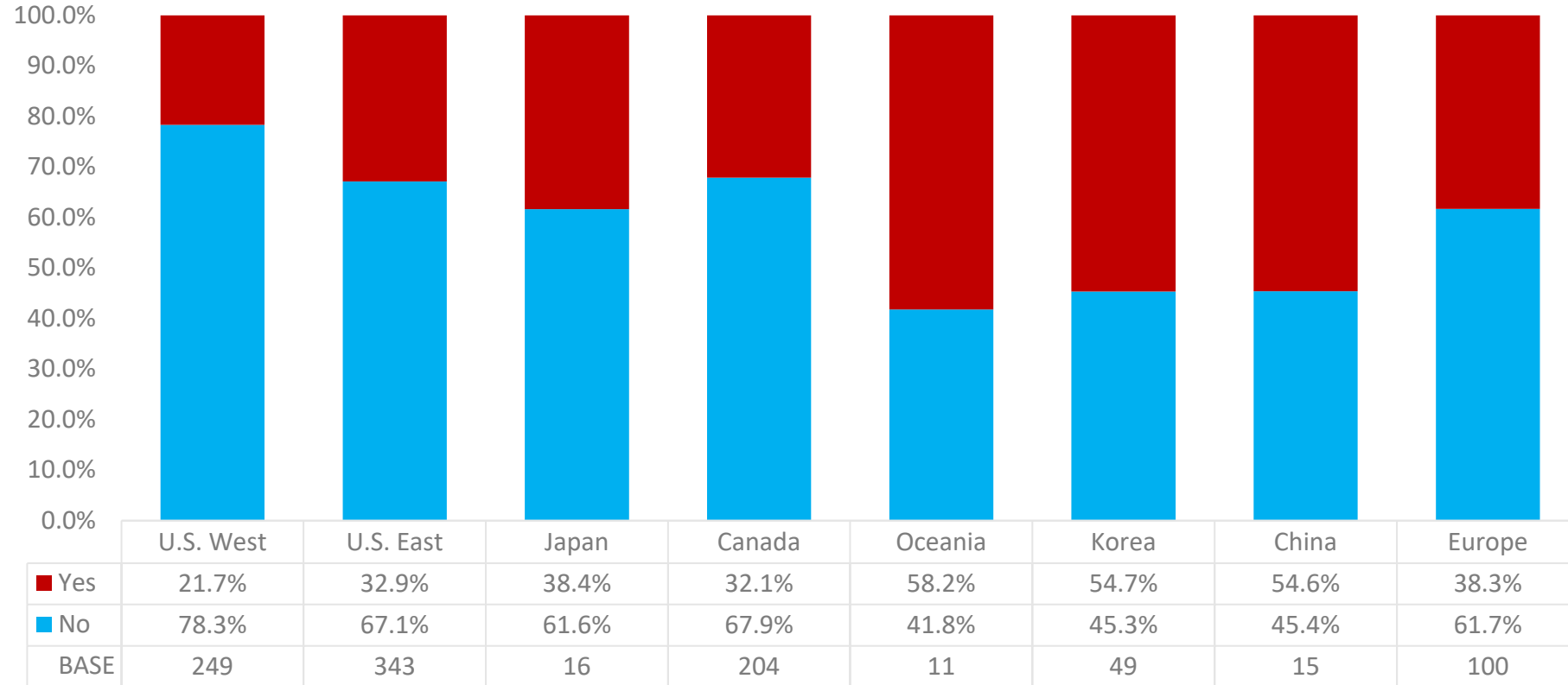
# AREAS VISITED ISLAND OF HAWAI'I CHINA



# AREAS VISITED ISLAND OF HAWAI'I EUROPE

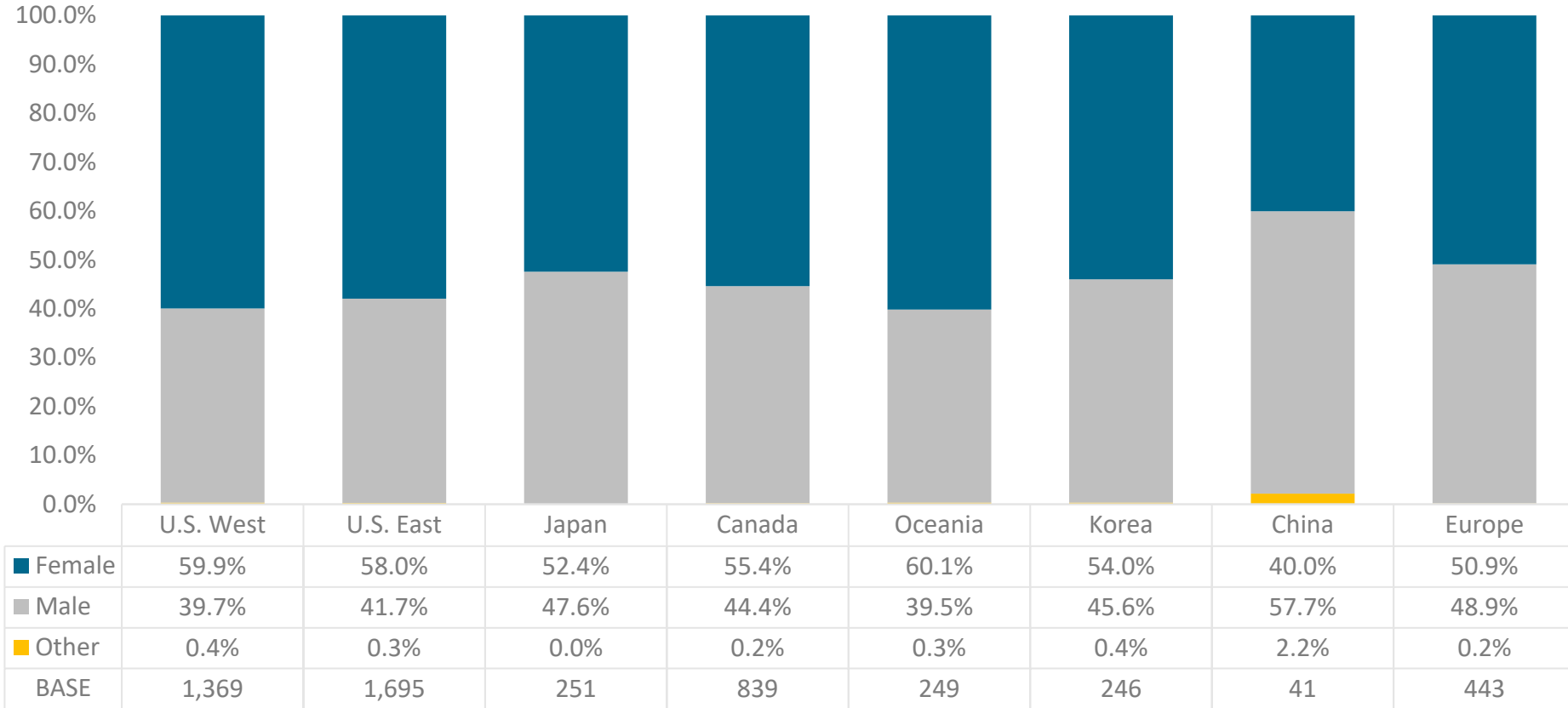


# VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I



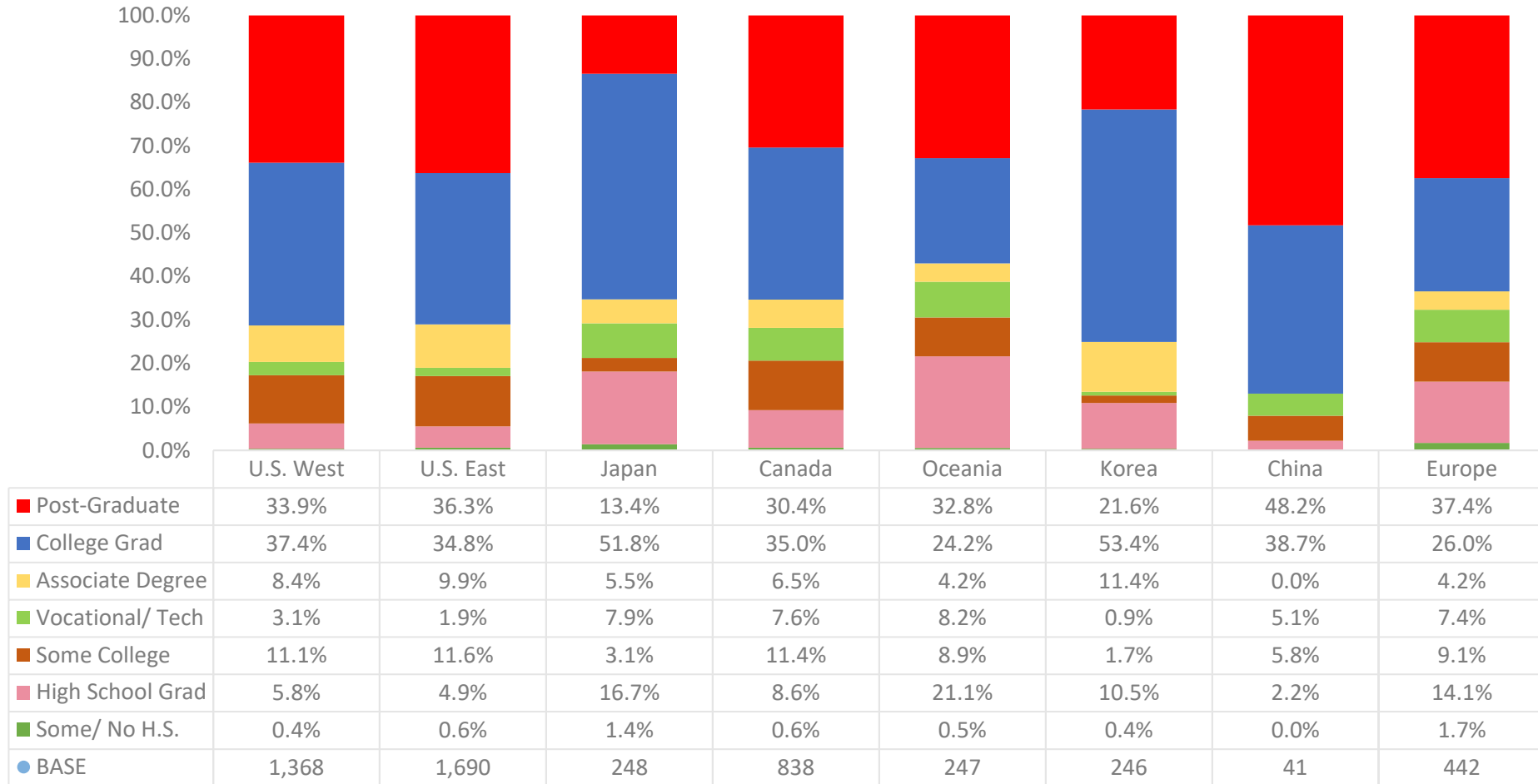
# Section 9 – Visitor Profile

# VISITOR PROFILE - GENDER





# VISITOR PROFILE - EDUCATION



# VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	5.1%	4.2%	4.3%	10.7%	13.8%
\$40,000 to \$59,999	5.4%	6.3%	6.2%	8.1%	12.1%
\$60,000 to \$79,999	7.7%	7.9%	7.8%	6.4%	12.0%
\$80,000 to \$99,999	9.1%	8.5%	10.2%	9.0%	12.7%
\$100,000 to \$124,999	11.6%	12.3%	15.5%	12.6%	10.0%
\$125,000 to \$149,999	10.4%	12.5%	12.2%	11.0%	10.7%
\$150,000 to \$174,999	9.6%	8.3%	8.3%	8.6%	7.6%
\$175,000 to \$199,999	6.6%	5.9%	9.8%	10.5%	5.0%
\$200,000 to \$249,999	11.3%	11.1%	9.5%	4.7%	7.8%
\$250,000 +	23.4%	23.0%	16.1%	18.4%	8.4%

# VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	17.2%
¥3.5 - ¥4.5 million	10.4%
¥4.5 - ¥5.5 million	9.1%
¥5.5 - ¥6.5 million	5.6%
¥6.5 - ¥7.5 million	4.5%
¥7.5 - ¥8.5 million	5.1%
¥8.5 - ¥10.0 million	12.1%
¥10.0 - ¥15.0 million	20.4%
¥15.0 - ¥20.0 million	4.5%
¥20.0 million +	11.1%

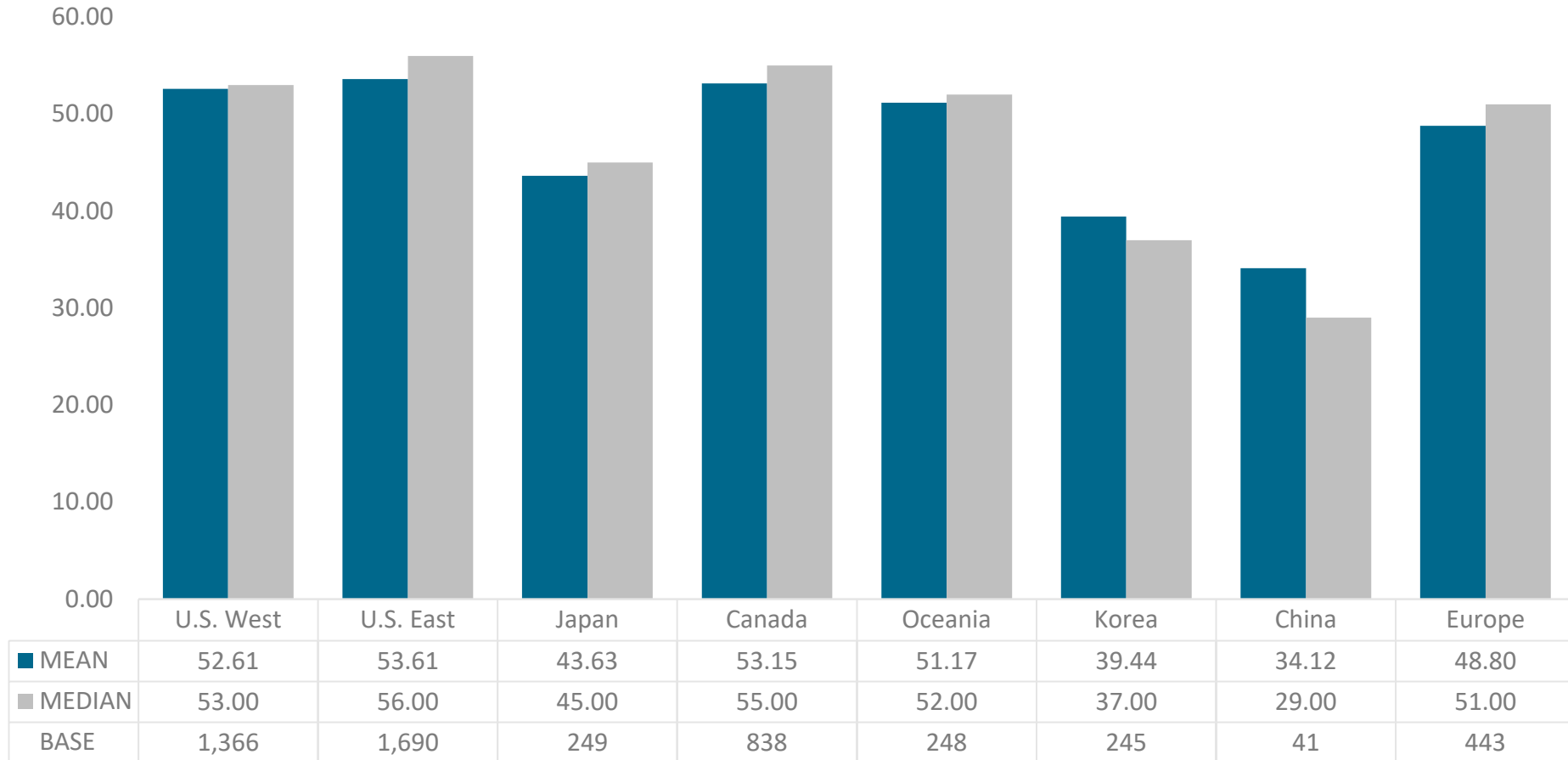
# VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	7.5%
₩16,305,000-27,173,999	4.3%
₩27,174,000-38,041,999	9.6%
₩38,042,000-48,911,999	8.0%
₩48,912,000-59,781,999	11.4%
₩59,782,000-70,652,999	9.0%
₩70,653,000-81,520,999	12.2%
₩81,521,000-92,390,999	10.5%
₩92,391,000-103,259,999	7.8%
₩103,260,000-149,999,999	6.4%
₩150,000,000-199,999,999	4.5%
₩200,000,000+	8.9%

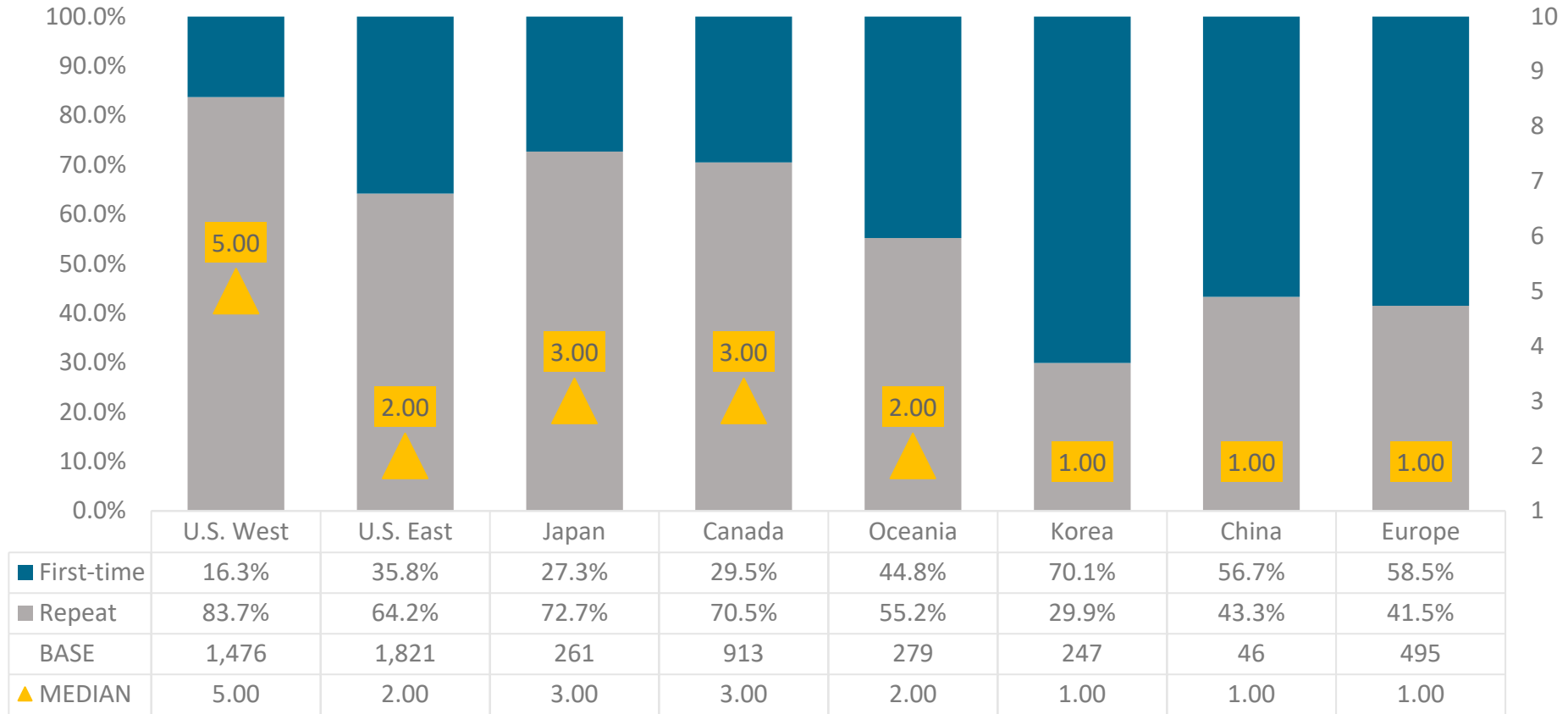
# VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	10.6%
¥250,800 – 376,099	16.3%
¥376,100 – 501,399	8.9%
¥501,400 – 626,799	14.8%
¥626,800 – 783,499	7.4%
¥783,500 – 940,199	4.9%
¥940,200 – 1,096,899	9.6%
¥1,096,900-1,253,599	3.2%
¥1,253,600 – 1,560,799	2.5%
¥1,560,800+	21.9%

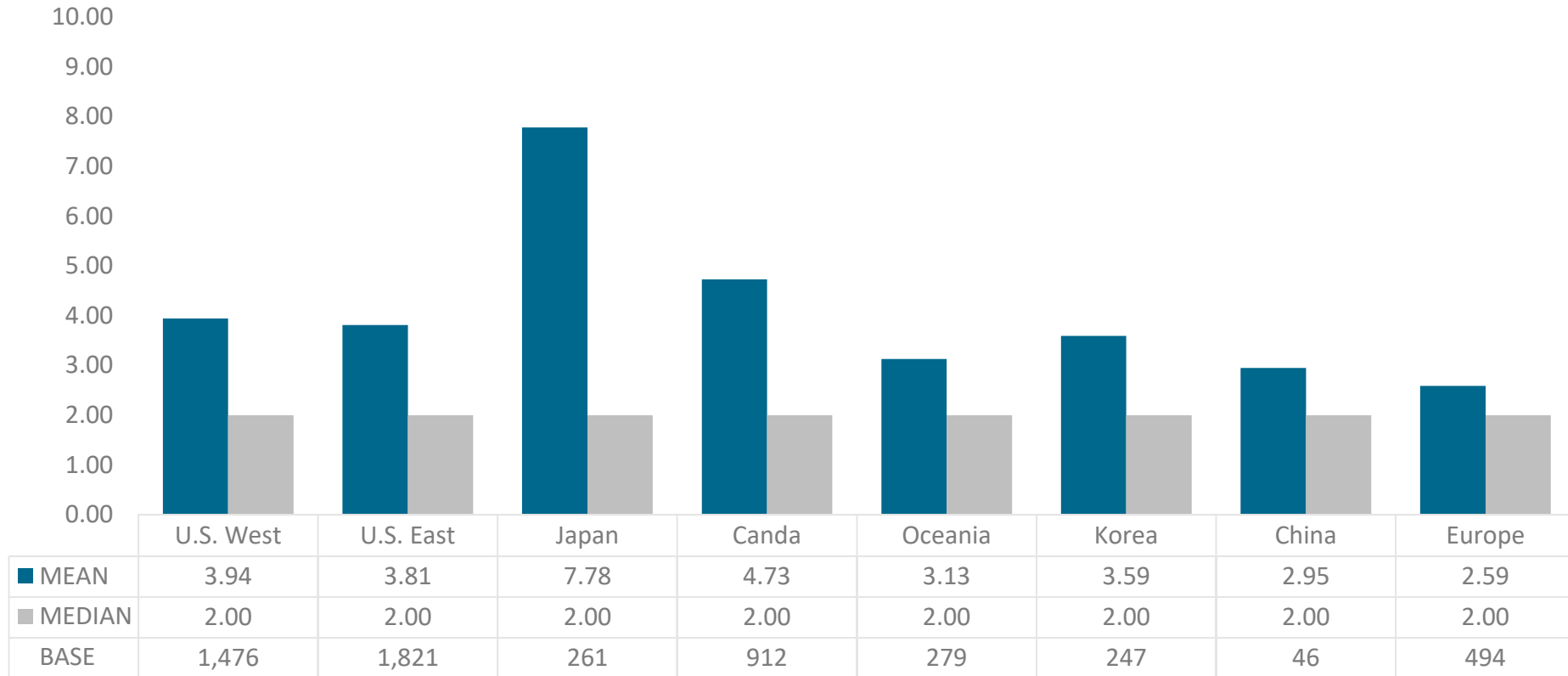
# VISITOR PROFILE - AGE



# 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	Europe
<b>My spouse</b>	57.2%	58.5%	51.1%	67.2%	58.9%	65.8%	21.3%	39.4%
<b>Other adult members of my family</b>	26.1%	25.2%	34.6%	29.7%	25.0%	21.8%	20.6%	16.1%
<b>My child(ren)/ grandchild(ren) under 18</b>	25.1%	21.6%	15.0%	25.2%	33.3%	20.0%	19.4%	10.6%
<b>My friends/ associates</b>	16.6%	16.0%	17.6%	15.4%	8.4%	15.2%	21.3%	17.5%
<b>Myself only (traveled alone/ no one else)</b>	11.4%	12.2%	10.2%	7.3%	16.4%	5.2%	26.6%	20.5%
<b>My girlfriend/ boyfriend</b>	7.1%	5.4%	1.8%	4.0%	2.9%	2.0%	19.2%	11.0%
<b>Same gender partner</b>	0.8%	1.0%	0.0%	0.7%	0.3%	0.0%	2.5%	1.2%

# 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	733	3.62
U.S. East	1,083	2.98
Japan	253	6.16
Canada	409	4.85
Oceania	269	5.98
Korea	226	6.52
China	39	15.69
Europe	367	5.12
All MMAs	3,379	1.69

\* 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	249	6.21
U.S. East	378	5.04
Japan	4	49.00
Canada	218	6.64
Oceania	11	29.55
Korea	11	29.55
China	1	98.00
Europe	103	9.66
All MMAs	975	3.14

\* 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	377	5.05
U.S. East	538	4.23
Japan	3	56.58
Canada	261	6.07
Oceania	17	23.77
Korea	17	23.77
China	5	43.83
Europe	146	8.11
All MMAs	1,364	2.65

\* 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	273	5.93
U.S. East	447	4.64
Japan	16	24.50
Canada	254	6.15
Oceania	14	26.19
Korea	57	12.98
China	16	24.50
Europe	148	8.06
All MMAs	1,225	2.80

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

