

VISITOR SATISFACTION STUDY QUARTER 2, 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 2, 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	1,644	2.42	17.05
U.S. East	1,788	2.32	19.25
Japan	394	4.94	21.09
Canada	864	3.33	23.19
Oceania	418	4.79	20.25
Korea	295	5.71	43.26
China	68	11.88	6.59
Europe	563	4.13	16.25
All visitor markets	6,034	1.26	19.00

Survey Methodology (cont.)

Monthly samples of visitors who stayed for at least two days were drawn from the completed Domestic In-flight and International Departure Intercept surveys. Selected 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 2, 2024. The VSAT weighting system was developed to adjust for disproportionate sampling across all visitor markets.

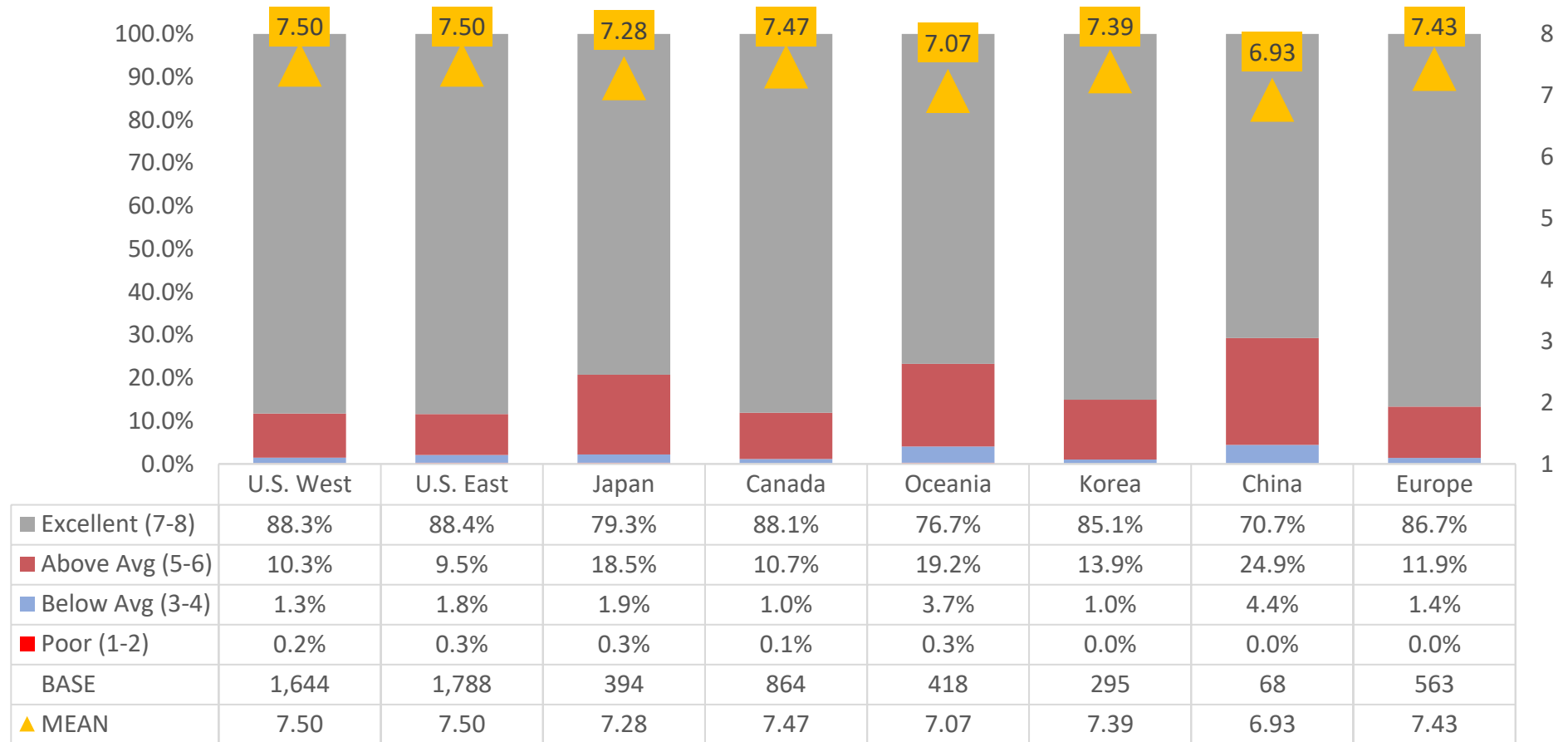
Data for 2024 are preliminary. Data for prior years reflect final visitor statistics from DBEDT Annual Visitor Research reports.

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



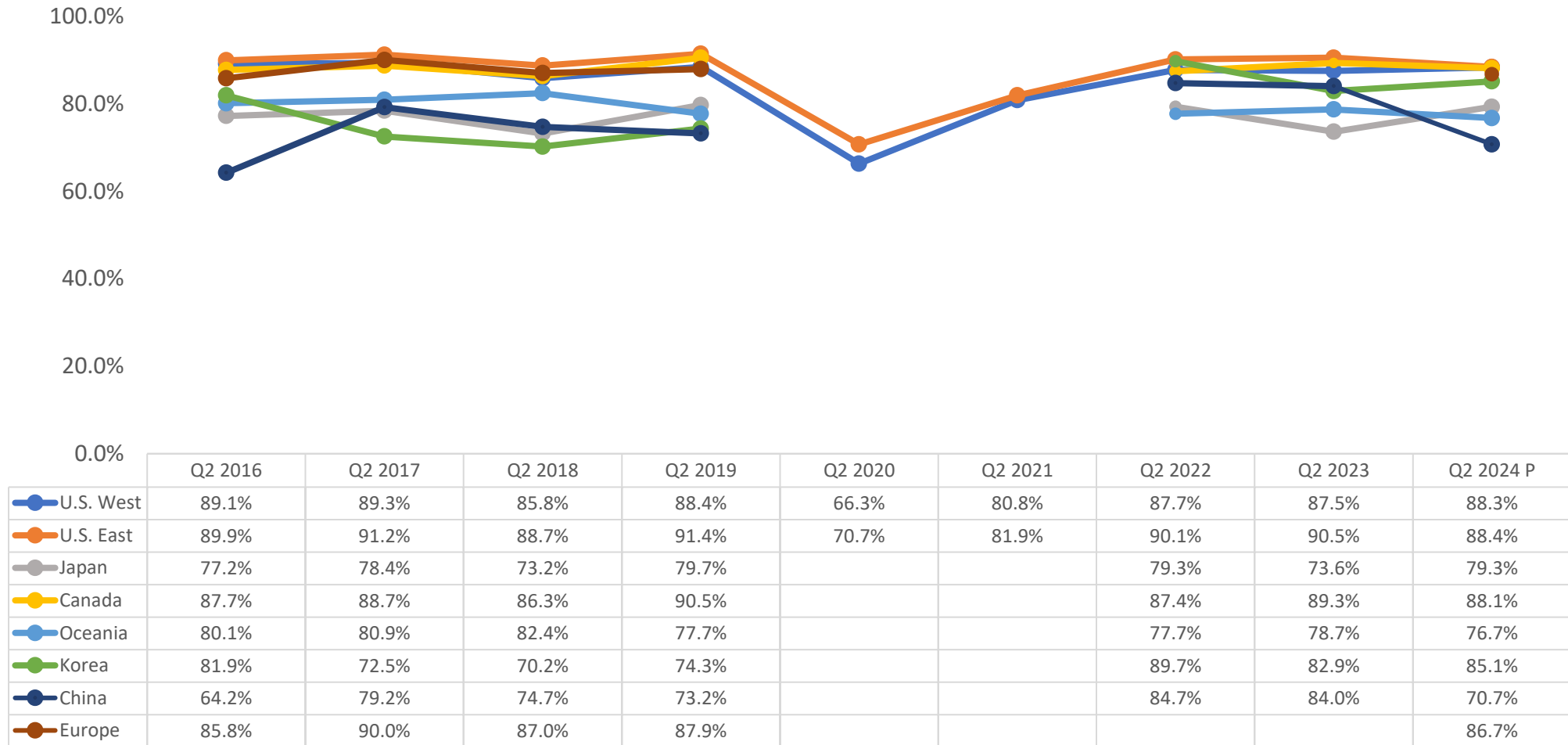
SATISFACTION – STATE OF HAWAI‘I BY VISITOR MARKET

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



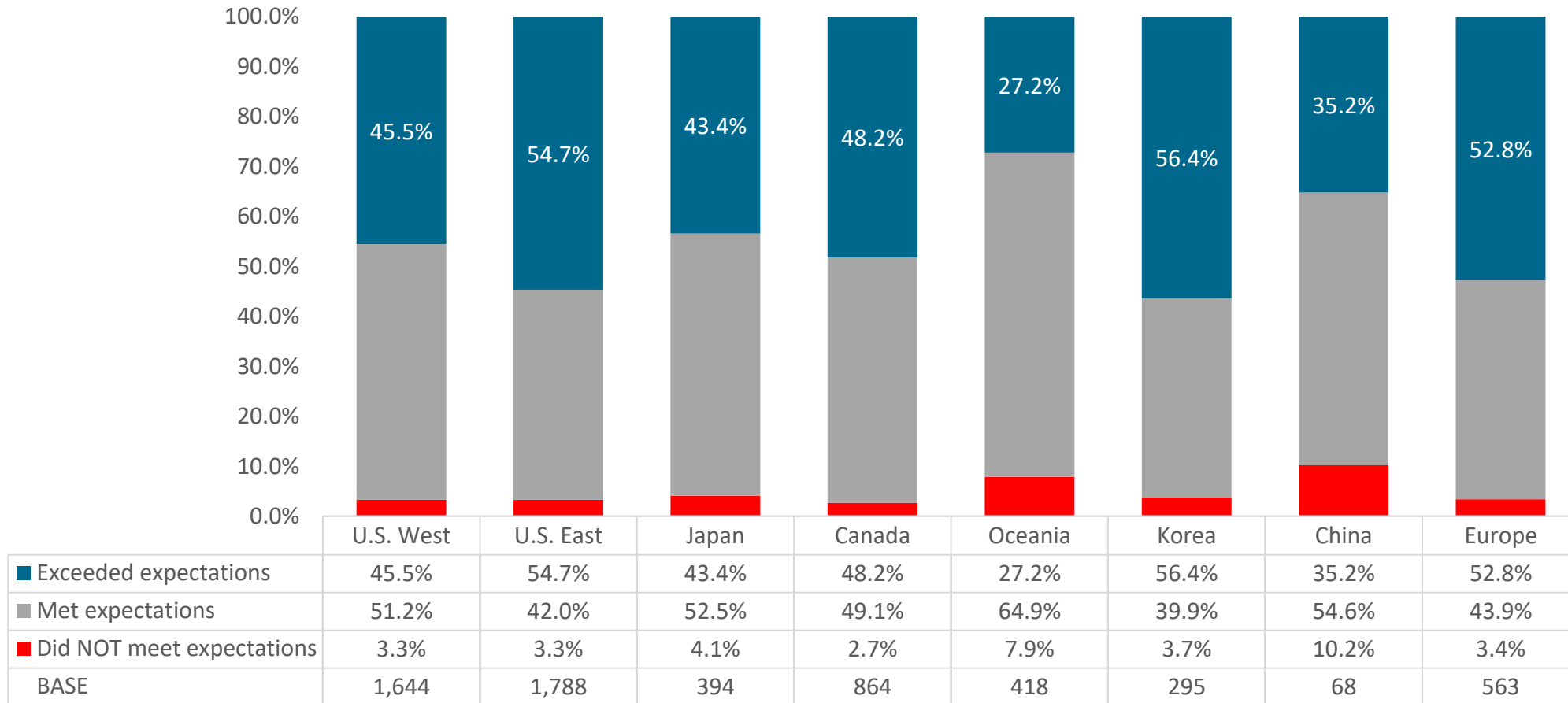
P= Preliminary Data

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

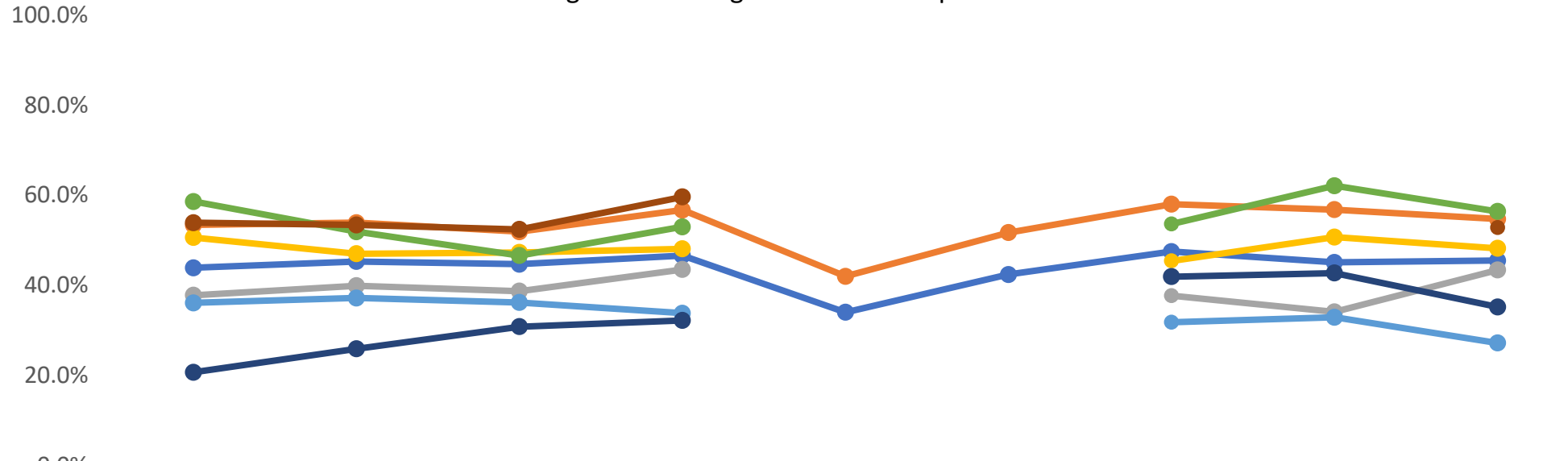


SATISFACTION - HAWAI'I TRIP EXPECTATIONS

- ***Trips to Hawai'i:*** First-time visitors from the following visitor markets gave higher scores than repeat visitors: **U.S. West, U.S. East, Oceania, Canada and Japan.**
- ***Age:*** Younger respondents from **U.S. West** (between 18 – 49 years old) , **U.S. East** (between 18 – 49 years old) and **Japan** (18 – 34 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.

SATISFACTION - HAWAI'I TRIP EXPECTATIONS

Tracking Data – Rating of “Exceeded expectations”



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	43.9%	45.3%	44.7%	46.6%	34.0%	42.4%	47.5%	45.1%	45.5%
U.S. East	53.4%	53.9%	51.9%	56.7%	42.0%	51.7%	58.0%	56.8%	54.7%
Japan	37.8%	39.9%	38.7%	43.5%			37.7%	34.1%	43.4%
Canada	50.6%	47.0%	47.3%	48.1%			45.4%	50.7%	48.2%
Oceania	36.1%	37.2%	36.2%	33.8%			31.8%	32.9%	27.2%
Korea	58.6%	51.9%	46.6%	53.0%			53.6%	62.1%	56.4%
China	20.7%	25.9%	30.8%	32.2%			41.9%	42.7%	35.2%
Europe	53.9%	53.4%	52.4%	59.6%					52.8%

P= Preliminary Data

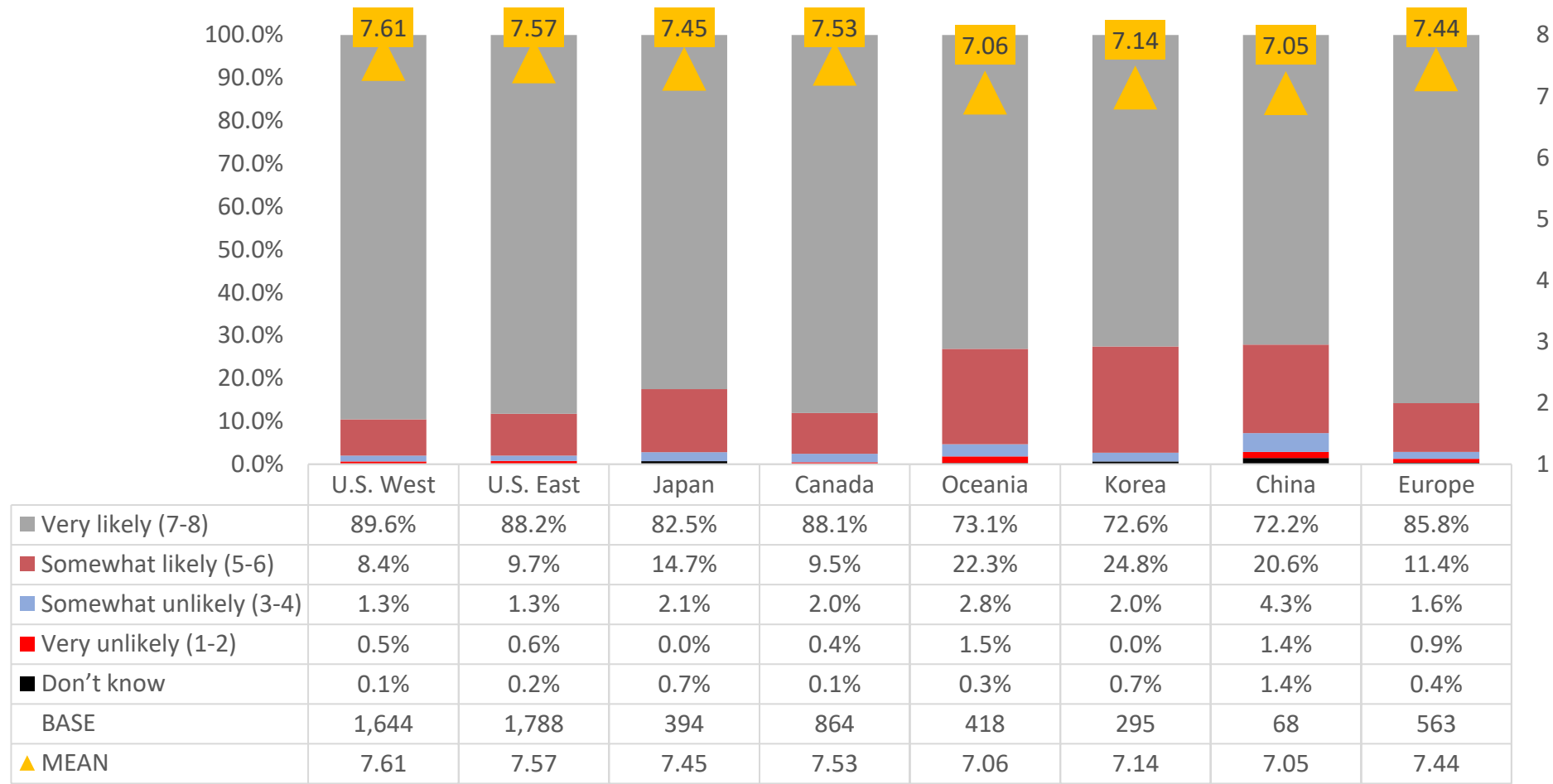
Q. Would you say this trip to Hawai'i ___?

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



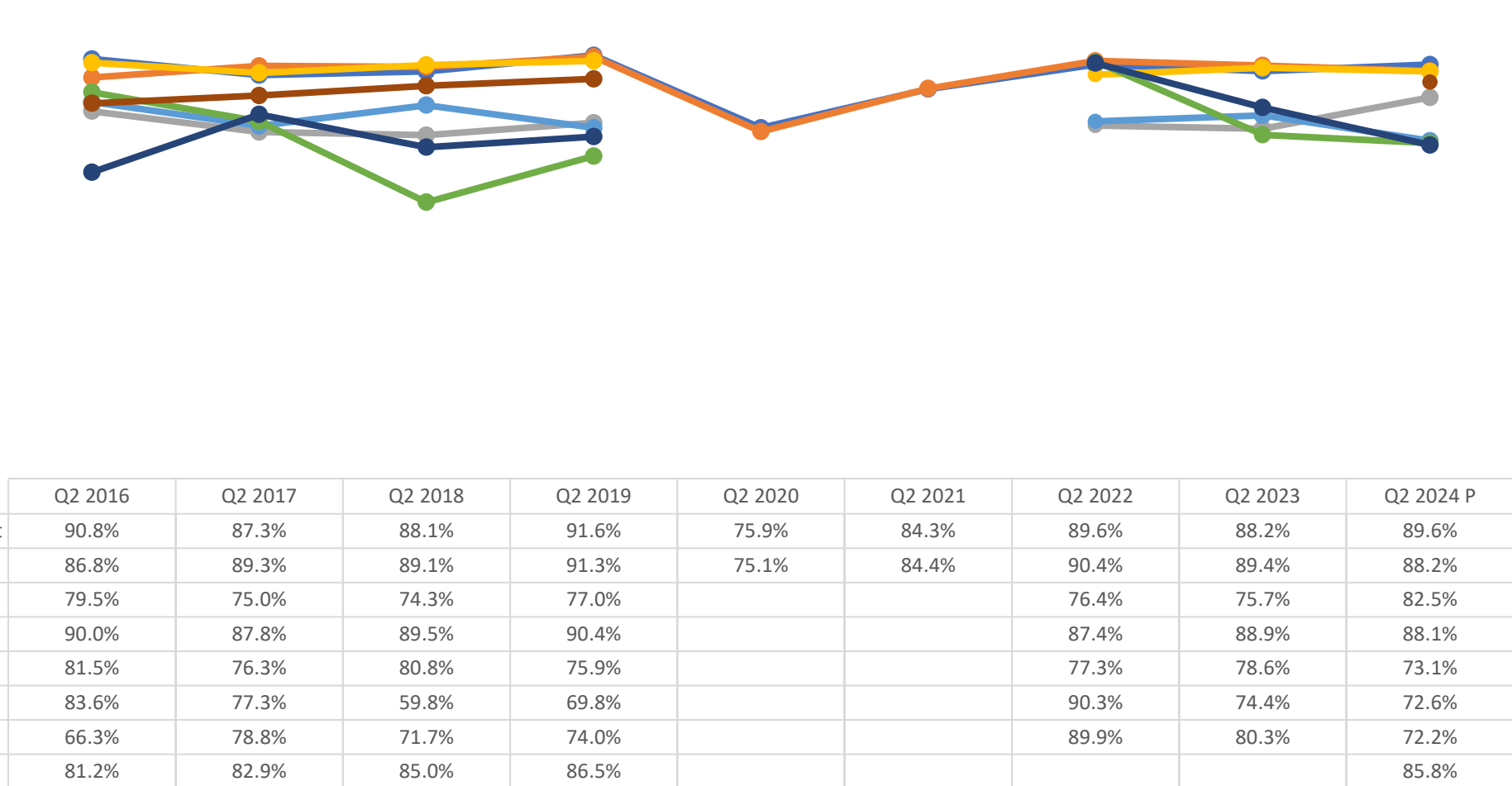
BRAND/ DESTINATION - ADVOCACY

- **Gender:** Female respondents from **U.S. West** and **U.S. East** were more likely to recommend the state to others than male respondents from these visitor markets.
- **Education:** Visitors from **U.S. West** and **Japan** without a college degree were more likely to recommend the state compared to college graduates.
- **Trips to Hawai'i:** Repeat visitors from **U.S. West** and **U.S. East** were more likely to recommend the state to others compared to first-time visitors. First-time visitors from **Japan** were more likely to recommend the state to others than repeat visitors.
- **Age:** Seniors from **Japan** were the least likely to recommend the state to others.

BRAND/ DESTINATION - ADVOCACY

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

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



P= Preliminary Data

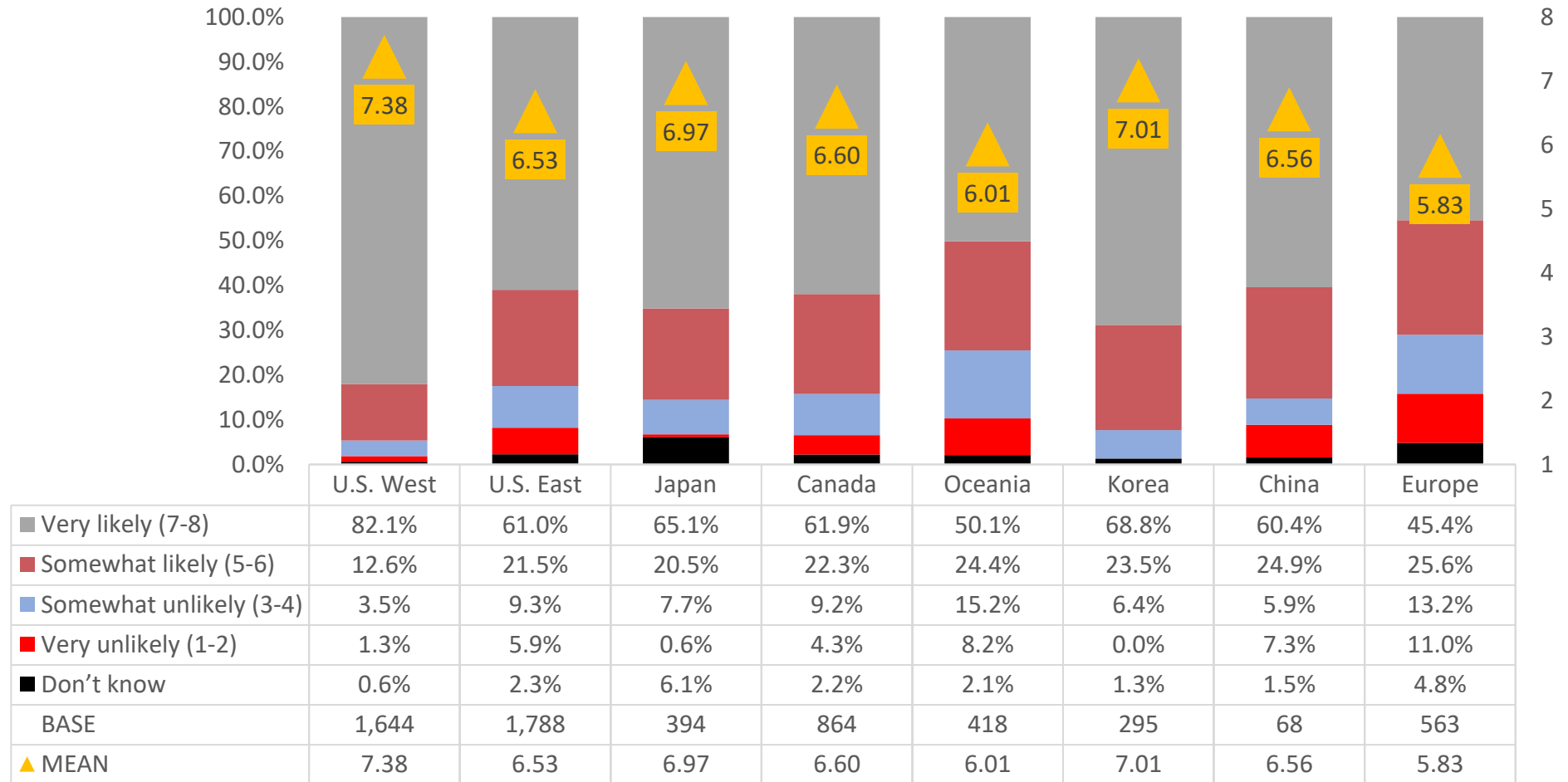
Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

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

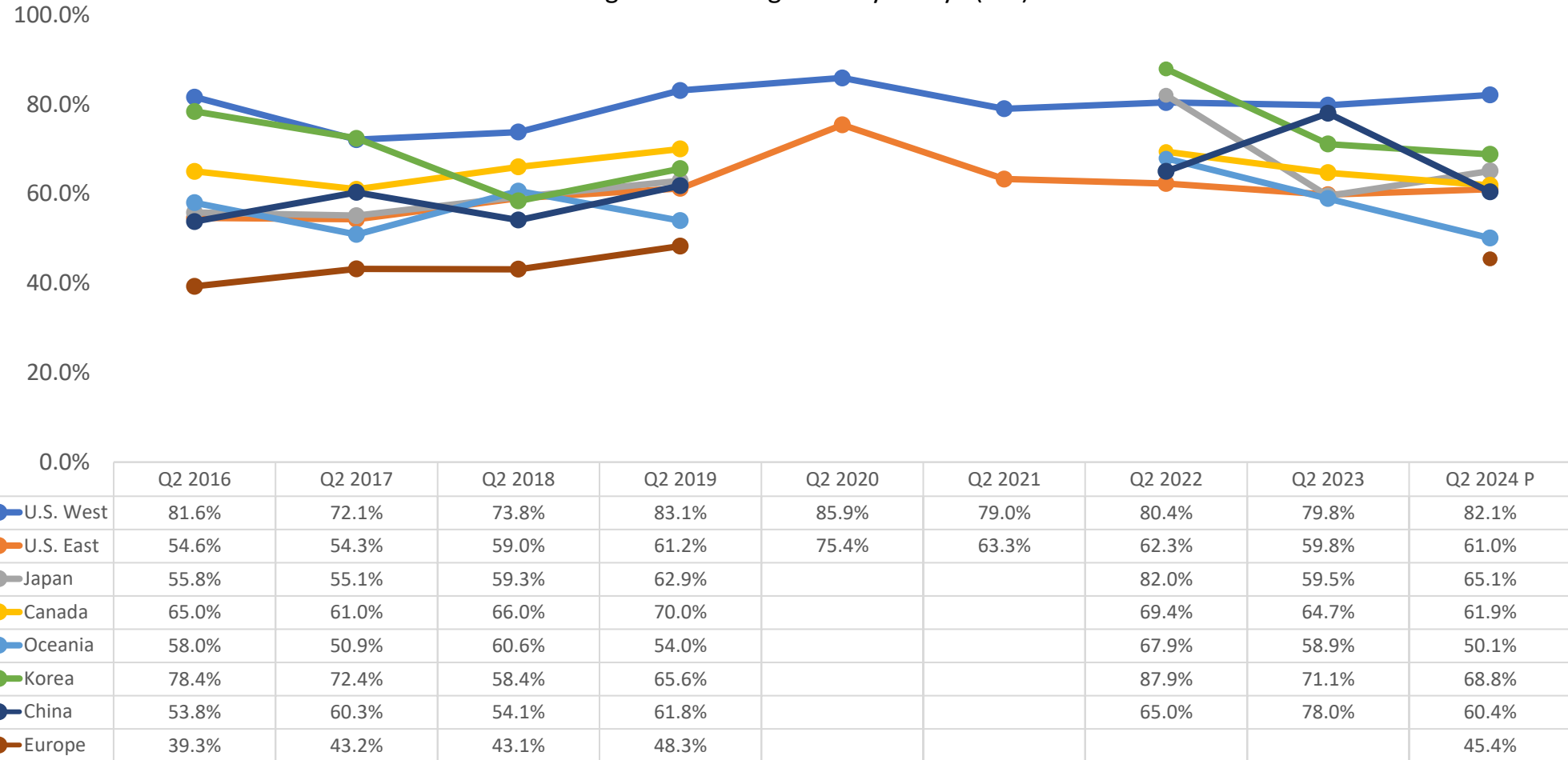


LIKELIHOOD OF RETURN VISIT

- **Gender:** Female respondents from **U.S. West** expressed a greater likelihood to return to Hawai'i than male respondents.
- **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. West** 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** and **Japan** between the ages 18-34 years old expressed the least likelihood of returning than other age groups from these visitor markets. Younger visitors from **U.S. East** under 50 appear more likely to return to the state.
- **Travel party size:** Those from **U.S. East** who traveled to the state by themselves 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)



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

Q2 2023	Q2 2024 P
61.6% Too expensive	63.6% Too expensive
42.6% Want to go someplace new	30.6% Poor value
34.2% Poor value	29.4% Want to go someplace new
31.1% Too crowded/ congested/ traffic	18.2% Five years is too soon
17.0% Too commercialized/ overdeveloped	18.1% Too crowded/ congested/ traffic
15.2% Five years is too soon	18.1% No compelling reason to return
13.1% Unfriendly people/ felt unwelcome	16.9% Too commercialized/ overdeveloped
11.0% No compelling reason to return	14.8% Flight too long
	11.4% Unfriendly people/ felt unwelcome

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS U.S. EAST

Q2 2023	Q2 2024 P
59.6% Too expensive	54.4% Too expensive
44.6% Flight too long	39.7% Want to go someplace new
36.9% Want to go someplace new	39.2% Flight too long
21.0% Five years is too soon	18.1% Poor value
16.0% Poor value	17.0% Five years is too soon
15.0% Too crowded/ congested/ traffic	16.6% Other financial obligations
10.5% Other financial obligations	14.2% Too crowded/ congested/ traffic
	11.9% No compelling reason to return

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS JAPAN

Q2 2023*	Q2 2024 P**
79.1% Too expensive	61.3% Too expensive
31.5% Want to go someplace new	38.1% Five years is too soon
26.1% Five years is too soon	25.8% Want to go someplace new
20.9% Other financial obligations	21.5% Other financial obligations
15.8% Poor value	13.4% Flight too long
10.6% Poor health/ age	10.8% Poor health/ age
10.4% Too crowded/ congested/ traffic	
10.4% No compelling reason to return	

*Caution small base (n=19 respondents) in Q2 2023.

**Caution small base (n=52 respondents) in Q2 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CANADA

Q2 2023	Q2 2024 P
54.4% Too expensive	60.1% Too expensive
41.3% Want to go someplace new	43.0% Want to go someplace new
35.6% Flight too long	26.1% Flight too long
18.7% Five years is too soon	22.3% Five years is too soon
15.7% Poor value	17.8% Other financial obligations
13.7% Other financial obligations	17.8% Poor value
10.4% Too crowded/ congested/ traffic	11.1% No compelling reason to return

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS OCEANIA

Q2 2023	Q2 2024 P
50.1% Too expensive	61.7% Too expensive
36.4% Want to go someplace new	34.8% Want to go someplace new
26.7% Poor value	33.6% Poor value
21.5% Too commercialized/ overdeveloped	25.3% Too commercialized/ overdeveloped
16.6% No compelling reason to return	19.0% No compelling reason to return
12.6% Five years is too soon	18.2% Too crowded/ congested/ traffic
10.4% Too crowded/ congested/ traffic	13.4% Other financial obligations
10.1% Flight is too long	11.5% Flight too long

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS KOREA

Q2 2023*	Q2 2024 P**
77.8% Too expensive	78.4% Too expensive
36.6% Flight too long	34.6% Want to go someplace new
36.0% Poor value	30.5% Poor value
25.9% No compelling reason to return	25.9% Flight too long
25.4% Other financial obligations	17.6% Other financial obligations
24.5% Five years is too soon	13.2% Five years is too soon
21.3% Want to go someplace new	13.2% Too commercialized/ overdeveloped
13.0% Too crowded/ congested/ traffic	13.0% No compelling reason to return

*Caution small base (n=39 respondents) in Q2 2023.

**Caution small base (n=23 respondents) in Q2 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS CHINA

Q2 2023*	Q2 2024 P**
25.0% Too expensive	49.7% Too expensive
25.0% Flight too long	49.7% Poor value
25.0% Poor value	30.1% Want to go someplace new
25.0% Too commercialized/ overdeveloped	20.2% No compelling reason to return
25.0% Other financial obligations	20.2% Five years is too soon
25.0% No compelling reason to return	20.2% Unfriendly people/ felt unwelcome
25.0% Crime/ safety concern	20.2% Too commercialized/ overdeveloped
25.0% Airport/ immigration issue	20.2% Flight too long
	10.4% No time/ too busy/ no vacation time

*Caution small base (n=4 respondent) in Q2 2023.

**Caution small base (n=10 respondents) in Q2 2024.

P= Preliminary Data

UNLIKELY TO RETURN - TOP REASONS EUROPE

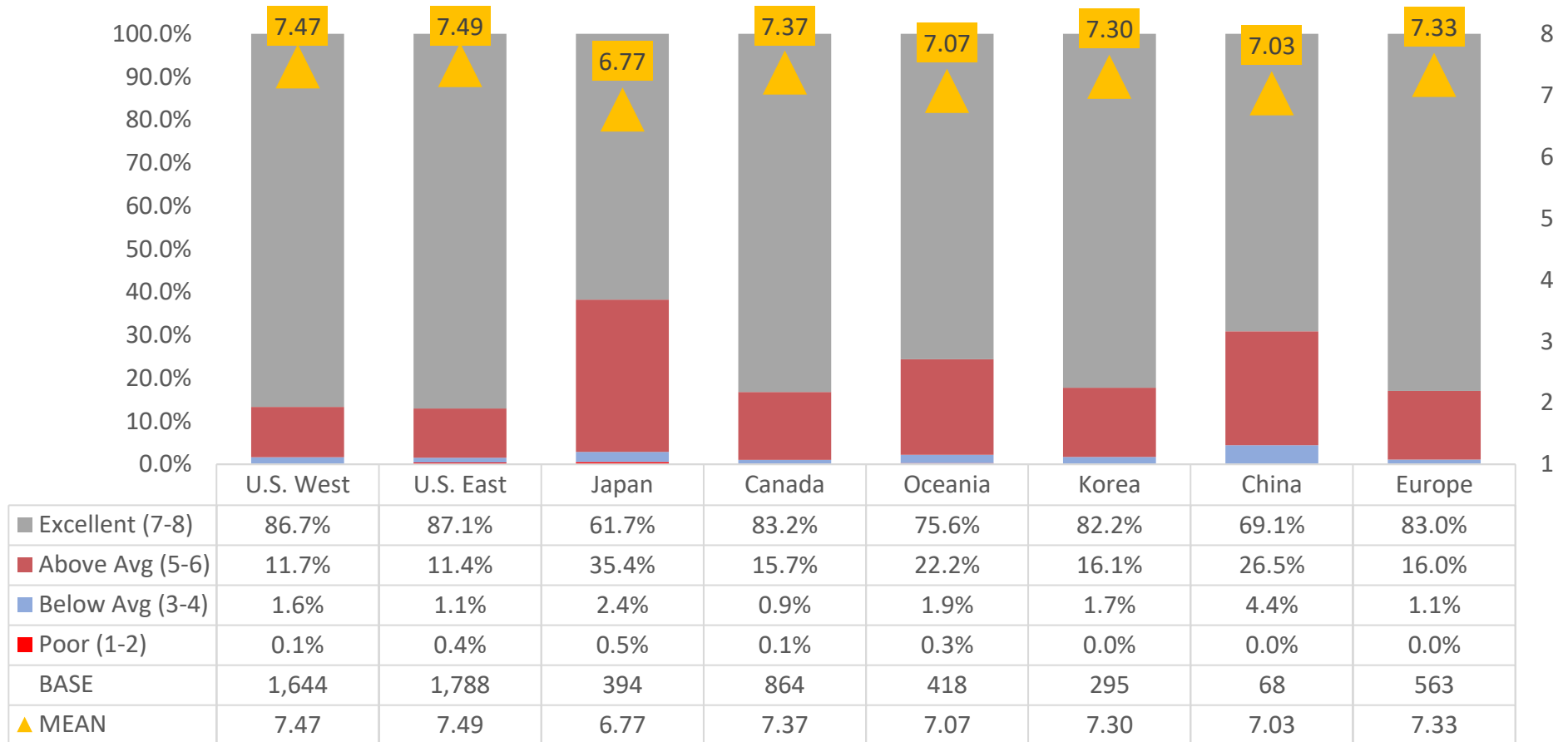
Q2 2019*	Q2 2024 P
62.5% Flight too long	65.0% Flight too long
52.2% Too expensive	53.4% Too expensive
37.2% Want to go someplace new	31.3% Want to go someplace new
16.4% Five years is too soon	22.7% Five years is too soon
14.0% Poor value	16.0% Other financial obligations
13.1% No compelling reason to return	15.9% Poor value
13.0% Too commercialized/ overdeveloped	10.4% Too commercialized/ overdeveloped
10.4% Other financial obligations	

*No data collected from 2020 thru 2023.

P= Preliminary Data

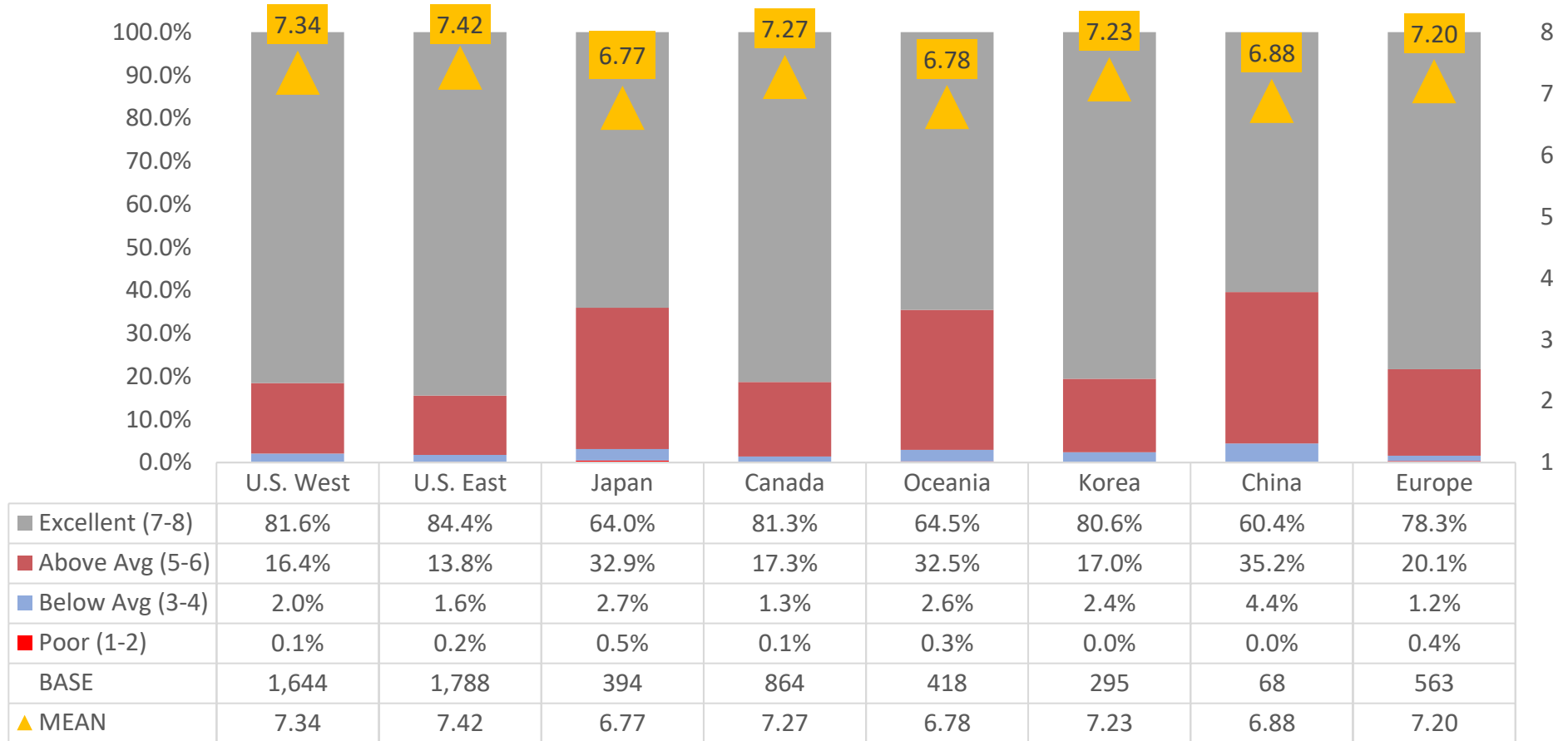
OFFERING A VARIETY OF EXPERIENCES

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



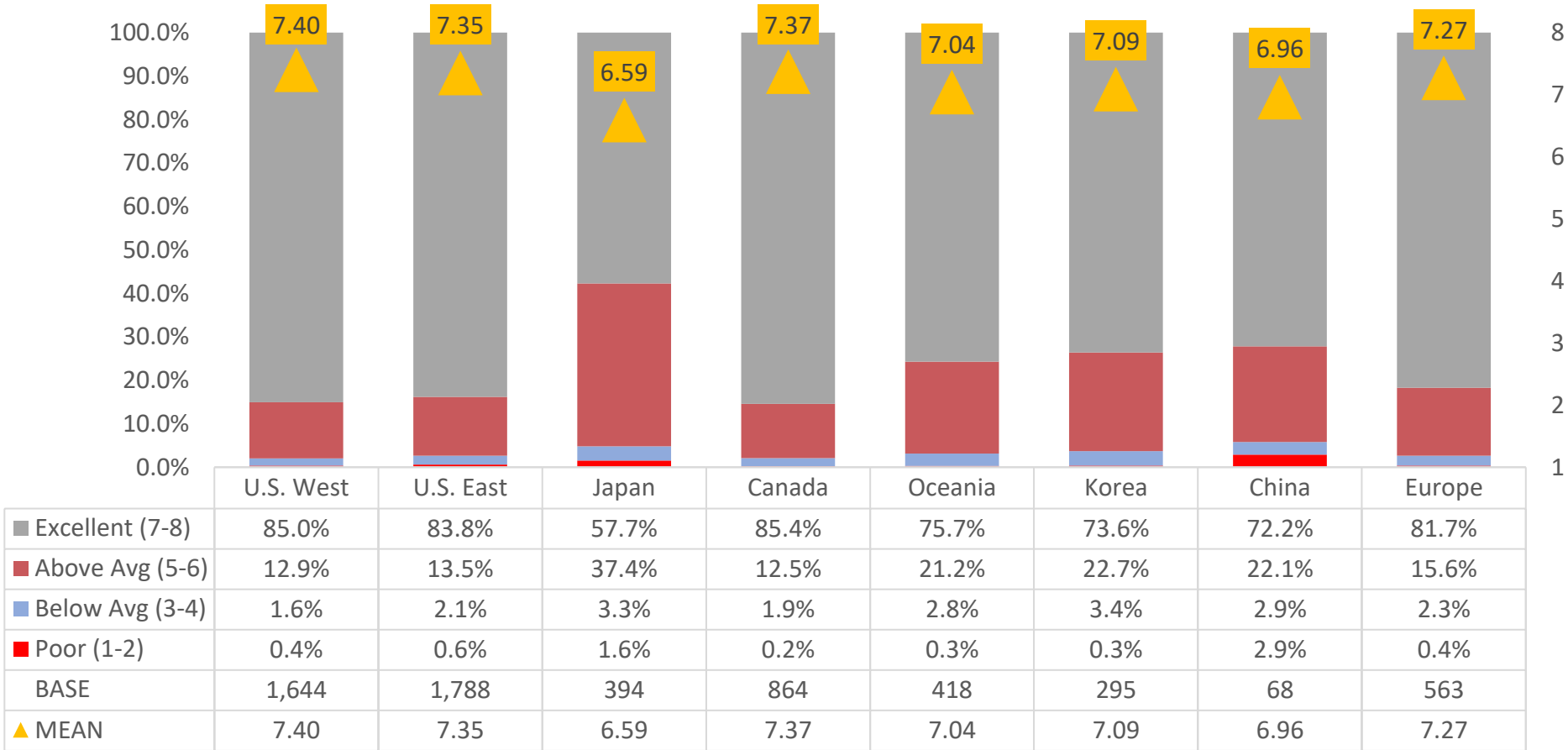
NUMBER OF DIFFERENT/ UNIQUE EXPERIENCES

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



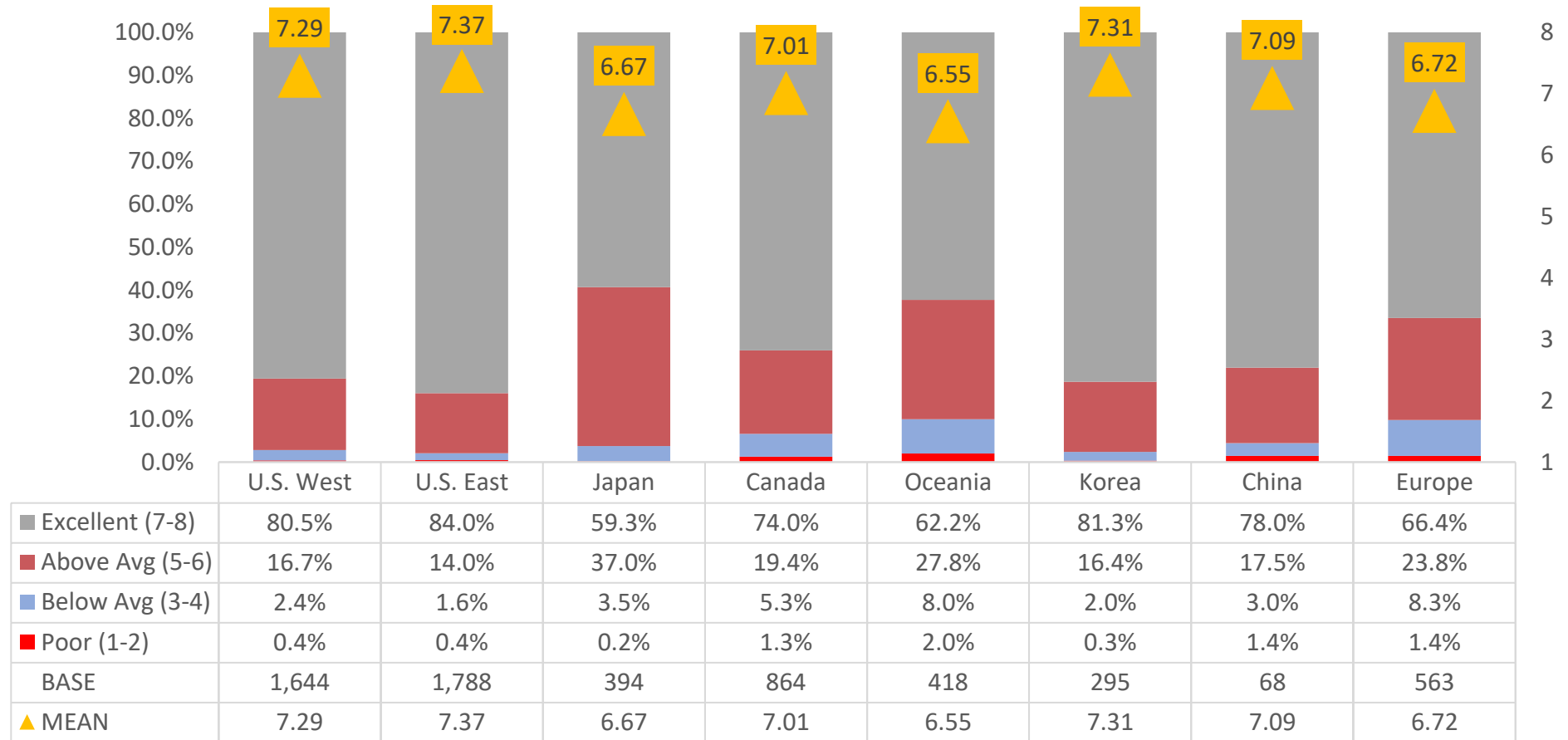
SAFE AND SECURE DESTINATION

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



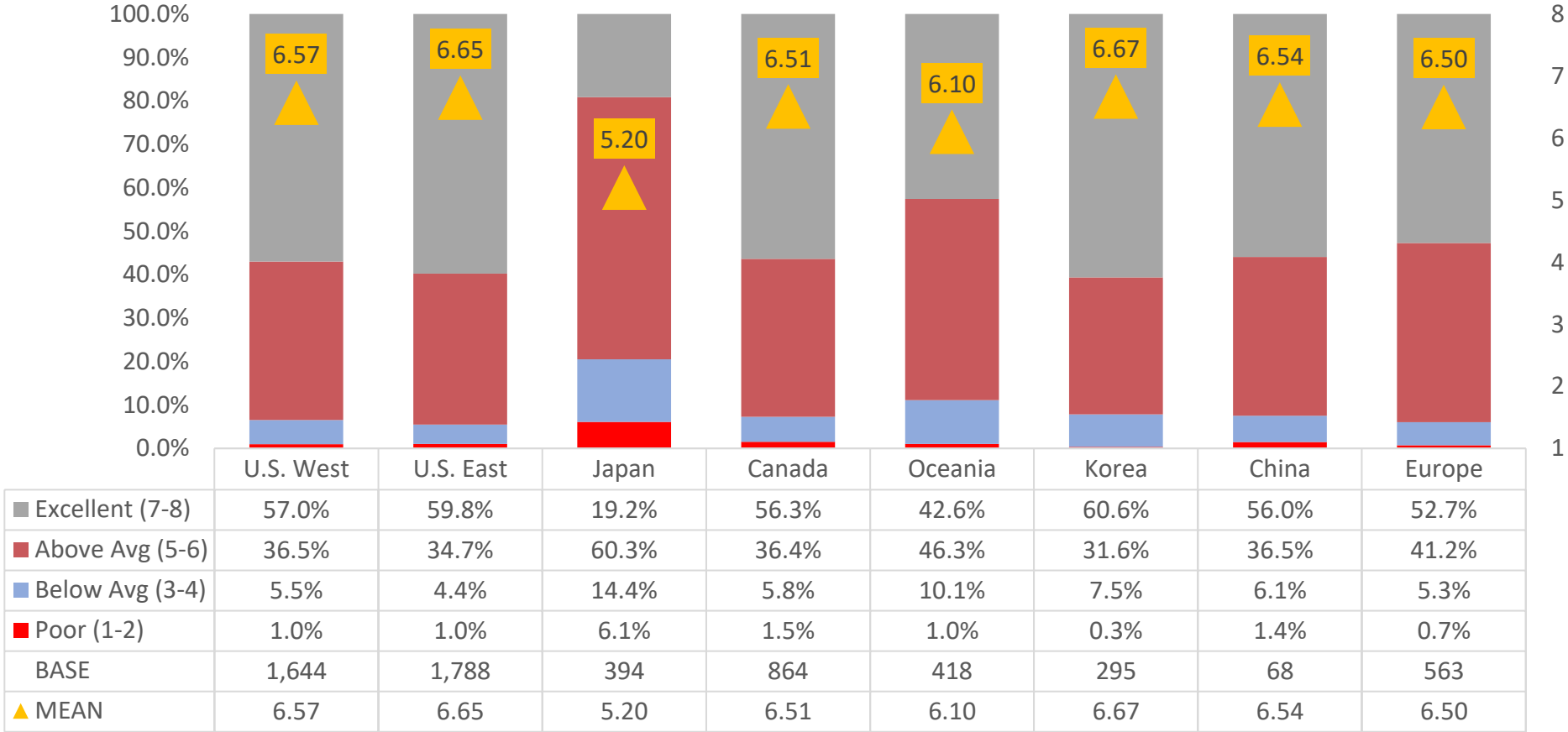
ENVIRONMENTALLY FRIENDLY/ SUSTAINABLE

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
TOTAL	98.0%	98.5%	97.7%	98.4%	94.3%	98.2%	100.0%	99.8%
On own (self-guided)/ driving around island	84.4%	81.7%	72.6%	79.3%	48.9%	80.4%	75.7%	72.0%
Helicopter ride/ airplane tour	2.8%	6.8%	0.3%	4.6%	3.8%	5.1%	5.0%	11.9%
Boat tour/ submarine ride/ whale watching	22.1%	31.0%	7.9%	22.9%	19.0%	31.6%	19.4%	22.1%
Visit towns/ communities	54.5%	55.7%	37.4%	55.7%	30.6%	37.5%	40.4%	42.9%
Private limousine/ van tour/ tour bus	7.5%	16.4%	16.9%	14.1%	33.3%	12.0%	11.2%	17.2%
Scenic views/ natural landmarks	59.2%	69.0%	22.4%	65.2%	53.0%	61.3%	75.8%	64.7%
Movie/ TV/ film location tours	5.8%	7.7%	4.4%	6.5%	8.9%	20.2%	16.0%	10.2%

ACTIVITIES - RECREATION

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	95.8%	95.9%	97.1%	97.9%	93.9%	96.9%	96.8%	95.8%
Beach/ sunbathing	84.6%	83.1%	71.7%	86.8%	78.8%	84.6%	80.8%	85.1%
Bodyboarding	10.2%	6.0%	0.2%	9.4%	4.2%	3.4%	8.1%	7.4%
Standup paddle boarding	4.0%	3.5%	2.5%	3.6%	2.8%	5.5%	6.4%	4.5%
Surfing	5.7%	6.7%	3.1%	7.3%	6.5%	10.1%	9.8%	11.7%
Canoe paddling	1.1%	0.9%	0.3%	1.4%	0.4%	2.8%	3.2%	1.5%
Kayaking	4.9%	4.9%	1.1%	4.3%	1.7%	5.5%	4.9%	2.6%
Swimming in the ocean	63.2%	62.1%	35.6%	66.9%	61.6%	46.2%	40.8%	69.0%
Snorkeling	43.0%	40.1%	10.3%	42.8%	27.6%	51.9%	32.5%	39.2%
Freediving	1.8%	1.2%	0.8%	1.2%	0.5%	1.4%	8.2%	0.8%
Windsurfing/ Kitesurfing	0.3%	0.1%	0.0%	0.5%	0.2%	0.7%	1.6%	0.9%
Jet skiing/ Parasailing	1.5%	1.6%	2.5%	0.7%	0.4%	1.1%	4.8%	0.9%
Scuba diving	2.0%	2.0%	1.5%	2.6%	0.4%	1.0%	3.4%	1.7%
Fishing	2.9%	3.2%	1.0%	1.1%	1.2%	0.0%	3.2%	1.1%
Golf	7.0%	5.5%	4.8%	6.0%	1.9%	2.1%	0.0%	2.1%
Running/ jogging/ fitness/ walking	29.3%	26.5%	28.5%	30.9%	25.8%	17.3%	24.2%	19.8%

ACTIVITIES - RECREATION (continued)

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	95.8%	95.9%	97.1%	97.9%	93.9%	96.9%	96.8%	95.8%
Cycling	2.8%	2.6%	3.1%	4.3%	1.3%	2.1%	3.3%	3.4%
Spa	7.4%	7.8%	2.3%	4.1%	6.3%	5.4%	1.6%	4.3%
Hiking	40.8%	46.7%	22.1%	44.7%	18.4%	20.0%	59.4%	48.4%
Backpacking/ camping	0.8%	1.7%	0.3%	2.1%	0.3%	1.0%	4.8%	1.7%
Agritourism	12.4%	15.2%	8.7%	11.3%	6.9%	13.7%	6.3%	13.1%
Sports event or tournament	1.8%	1.2%	1.8%	3.0%	0.8%	0.7%	0.0%	1.1%
Parks/ botanical gardens	35.8%	41.6%	27.4%	41.0%	29.3%	24.6%	29.1%	39.5%
Waterparks	1.9%	1.4%	2.3%	0.6%	1.8%	2.5%	6.5%	2.3%
Mountain tubing/ waterfall rappel	2.7%	2.6%	0.7%	1.4%	0.4%	0.3%	3.3%	3.2%
Zip-lining	4.3%	4.2%	0.7%	1.6%	1.2%	0.3%	3.2%	0.9%
Skydiving	0.1%	0.8%	1.6%	0.5%	0.0%	0.7%	4.9%	0.9%
All-terrain vehicle (ATV)	3.0%	4.2%	0.8%	2.6%	2.2%	10.6%	6.5%	2.5%
Horseback riding	0.9%	2.0%	1.8%	1.1%	0.2%	1.4%	4.8%	1.5%

ACTIVITIES - ENTERTAINMENT & DINING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	98.4%	97.2%	97.9%	97.7%	98.0%	99.0%	100.0%	96.8%
Lunch/ sunset/ dinner/ evening cruise	20.9%	25.4%	12.8%	21.6%	17.4%	28.2%	54.9%	26.3%
Live music/ stage show	27.9%	32.4%	17.4%	26.7%	24.8%	14.9%	24.3%	25.7%
Nightclub/ dancing/ bar/ karaoke	8.0%	6.6%	1.8%	6.2%	5.2%	2.7%	1.6%	8.5%
Fine dining	44.0%	45.1%	34.3%	34.7%	27.7%	50.0%	33.8%	26.5%
Family restaurant	62.6%	59.2%	24.0%	57.4%	67.3%	45.6%	22.8%	47.4%
Fast food	32.0%	31.7%	52.8%	40.5%	57.1%	56.8%	46.6%	40.1%
Food truck	47.4%	45.1%	27.0%	45.8%	35.9%	59.3%	34.5%	46.3%
Café/ coffee house	52.8%	49.0%	55.9%	54.8%	62.0%	65.7%	53.4%	59.4%
Ethnic dining	26.3%	30.1%	7.8%	21.1%	14.1%	27.2%	17.6%	11.2%
Farm-to-table cuisine	18.7%	16.8%	16.3%	12.1%	2.8%	3.4%	1.6%	9.8%
Prepared own meal	46.7%	35.9%	27.3%	52.2%	29.8%	18.5%	17.9%	35.1%

ACTIVITIES - SHOPPING

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	96.0%	95.6%	97.7%	95.5%	96.5%	97.6%	92.1%	94.5%
Malls/ department stores	42.1%	42.8%	80.3%	54.1%	73.7%	81.0%	53.3%	55.6%
Designer boutiques	16.5%	17.3%	11.4%	15.1%	14.5%	4.9%	6.5%	13.6%
Hotel/ resort stores	32.3%	38.5%	32.4%	27.2%	30.7%	31.4%	25.8%	27.8%
Swap meet/ flea market	19.0%	16.2%	4.4%	14.7%	7.6%	4.2%	3.3%	7.7%
Discount/ outlet stores	13.4%	13.0%	26.4%	15.1%	35.2%	53.5%	8.0%	14.2%
Supermarkets	57.4%	50.5%	63.1%	56.7%	52.9%	48.7%	56.6%	61.2%
Farmer's market	40.2%	31.5%	21.6%	36.8%	16.4%	9.3%	25.9%	34.2%
Convenience stores	50.8%	50.9%	56.9%	50.5%	68.8%	54.0%	53.3%	39.5%
Duty free stores	5.8%	3.9%	18.4%	6.6%	13.9%	35.1%	19.4%	7.8%
Hawai'i-made products	45.7%	50.1%	23.1%	44.8%	34.2%	27.8%	34.0%	45.6%
Local shops and artisans	54.6%	57.6%	11.5%	54.8%	41.6%	21.5%	24.2%	47.3%
Local fashion designers	7.4%	7.3%	3.6%	6.8%	9.3%	1.7%	8.1%	11.2%

ACTIVITIES - HISTORY, CULTURE & FINE ARTS

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	69.3%	77.6%	53.2%	74.2%	75.1%	59.3%	82.2%	78.1%
Historic military sites and museums	21.1%	31.2%	9.8%	24.2%	48.7%	20.0%	35.5%	36.3%
Historic Hawaiian sites and museums	31.1%	36.7%	17.7%	32.4%	23.9%	11.1%	34.0%	34.6%
Other historical sites, museums, and homes	11.7%	16.0%	6.0%	16.1%	11.1%	15.9%	13.0%	14.5%
Art museums	3.0%	3.4%	1.6%	2.5%	3.6%	4.8%	9.6%	4.3%
Art galleries and exhibitions	8.1%	8.5%	5.1%	10.9%	7.2%	2.1%	4.9%	7.6%
Lū'au/ Polynesian show/ hula show	27.3%	38.3%	15.1%	29.4%	24.1%	22.1%	20.9%	30.6%
Lesson- ex. ukulele, hula, canoe, lei making	5.9%	6.7%	4.2%	5.5%	3.8%	4.2%	9.8%	5.1%
Play/ concert/ theatre	3.4%	2.7%	3.2%	3.0%	2.3%	3.7%	6.4%	2.5%
Art/ craft fair	10.9%	11.0%	2.4%	11.2%	5.0%	3.8%	4.9%	4.2%
Festival /event	5.3%	5.1%	6.4%	5.6%	7.9%	2.8%	0.0%	4.9%

ACTIVITIES - TRANSPORTATION

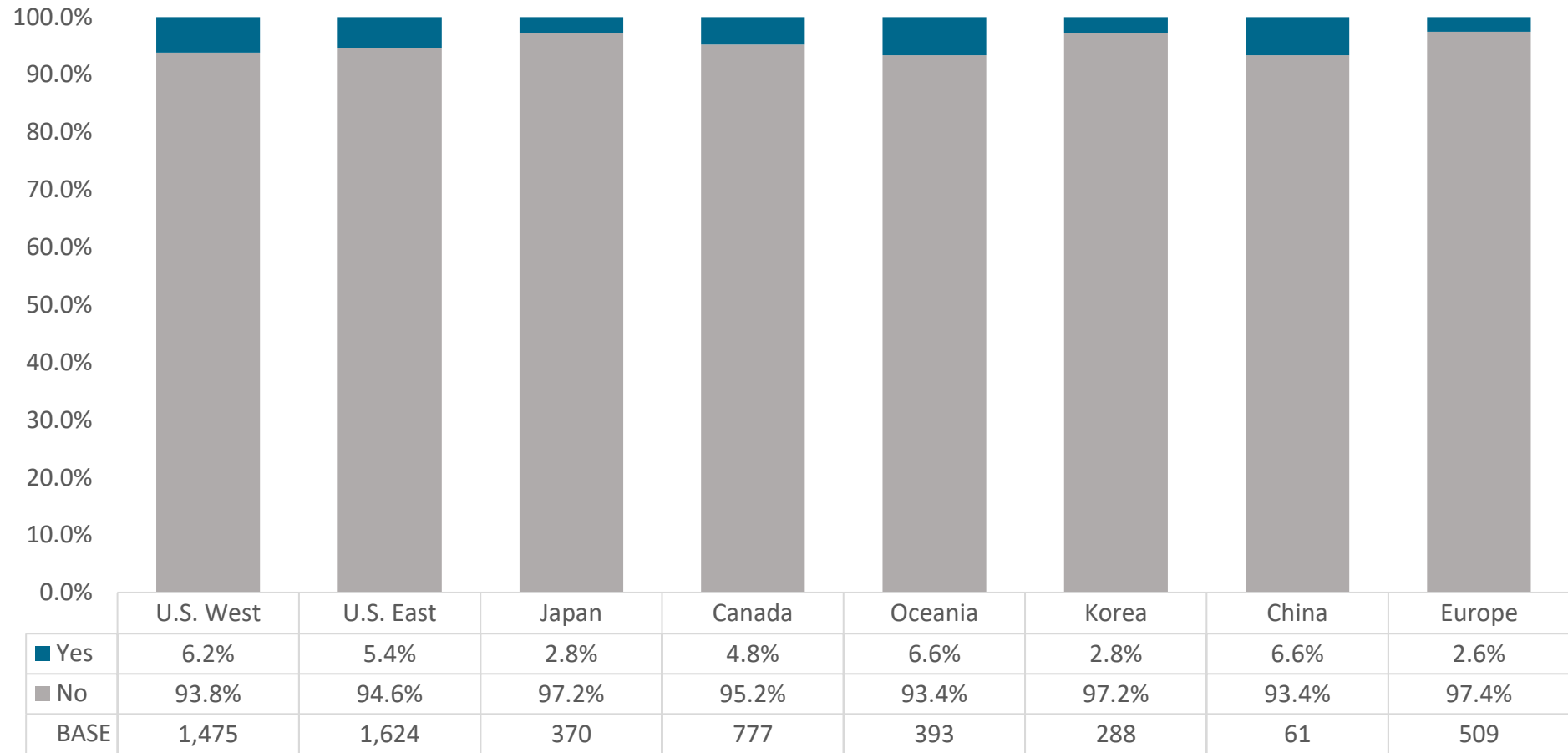
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	91.6%	91.9%	95.9%	94.3%	97.9%	95.5%	95.1%	93.0%
Airport shuttle	12.9%	15.3%	18.3%	15.9%	30.6%	15.5%	14.4%	18.3%
Trolley	2.0%	2.3%	48.5%	4.0%	14.2%	21.0%	1.7%	4.7%
Public bus	4.3%	5.8%	27.0%	11.2%	27.9%	11.6%	19.0%	18.7%
Tour bus/ tour van	7.2%	16.3%	20.9%	14.7%	34.8%	24.6%	7.9%	16.8%
Taxi/ limo	6.5%	7.6%	31.3%	14.8%	31.0%	19.3%	6.3%	16.4%
Rental car	71.4%	69.8%	24.6%	65.8%	30.4%	54.0%	51.7%	55.9%
Ride share	20.3%	23.2%	20.6%	21.3%	46.4%	25.5%	35.2%	26.3%
Car share (i.e.,Hui, Turo)	4.3%	3.2%	0.7%	5.7%	3.2%	3.5%	3.3%	2.8%
Bicycle rental	2.1%	2.2%	3.0%	2.5%	1.4%	1.0%	3.3%	2.3%

ACTIVITIES - OTHER

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
TOTAL	31.8%	29.0%	16.6%	21.9%	10.7%	20.7%	13.0%	16.4%
Visit friends/ family	29.8%	27.0%	14.5%	19.9%	9.5%	19.0%	9.7%	13.4%
Volunteering/ Giving back to the local community	3.0%	2.6%	2.0%	2.7%	1.2%	2.8%	3.3%	4.2%

Section 3 – Travelers with Disabilities

DISABLED TRAVELER - REQUIRED ASSISTANCE

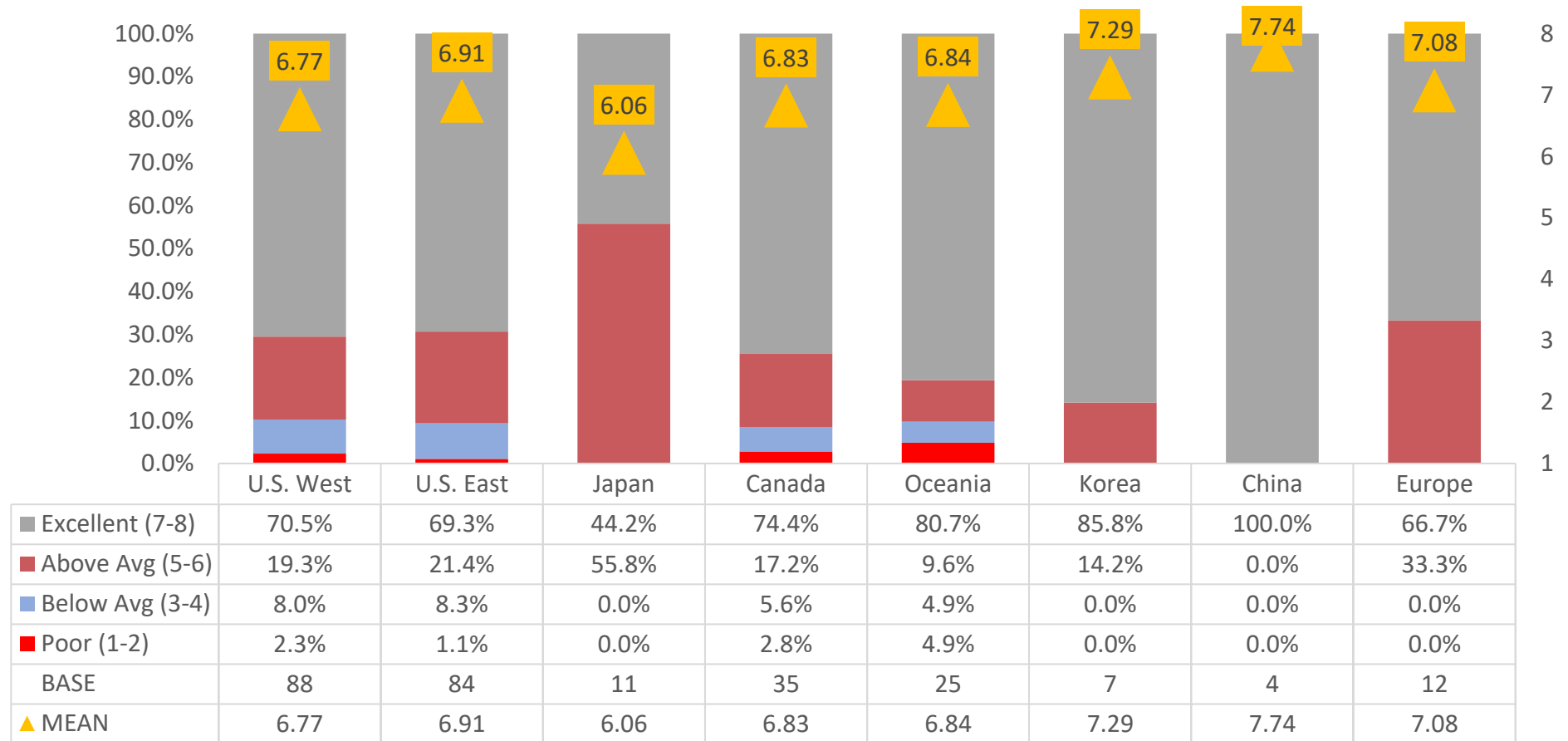


DISABLED TRAVELER - REQUIRED ASSISTANCE

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Mobility aid	70.0%	75.9%	46.9%	61.9%	59.7%	12.3%	74.2%	46.2%
Personal assistance	27.8%	15.8%	8.8%	21.5%	33.9%	12.3%	0.0%	23.0%
NA- No one needed assistance	6.7%	8.1%	26.5%	8.2%	12.9%	36.9%	25.8%	15.4%
Other	5.5%	9.3%	8.8%	5.4%	0.0%	0.0%	0.0%	0.0%
Orientation and Mobility Assistance	5.5%	1.2%	17.7%	10.9%	3.2%	12.3%	0.0%	7.7%
ASL Interpreter/ texting/ captioning	1.1%	3.5%	0.0%	2.8%	0.0%	12.3%	0.0%	0.0%
Lift equipped van	2.2%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	23.1%
Print material in alternate format	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Disabled parking/ placard	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%
Service/ assistance animal	0.0%	0.0%	0.0%	0.0%	0.0%	13.1%	0.0%	7.7%
No help was offered	0.0%	0.0%	0.0%	0.0%	0.0%	13.1%	0.0%	0.0%
BASE	90	86	11	37	25	8	4	13

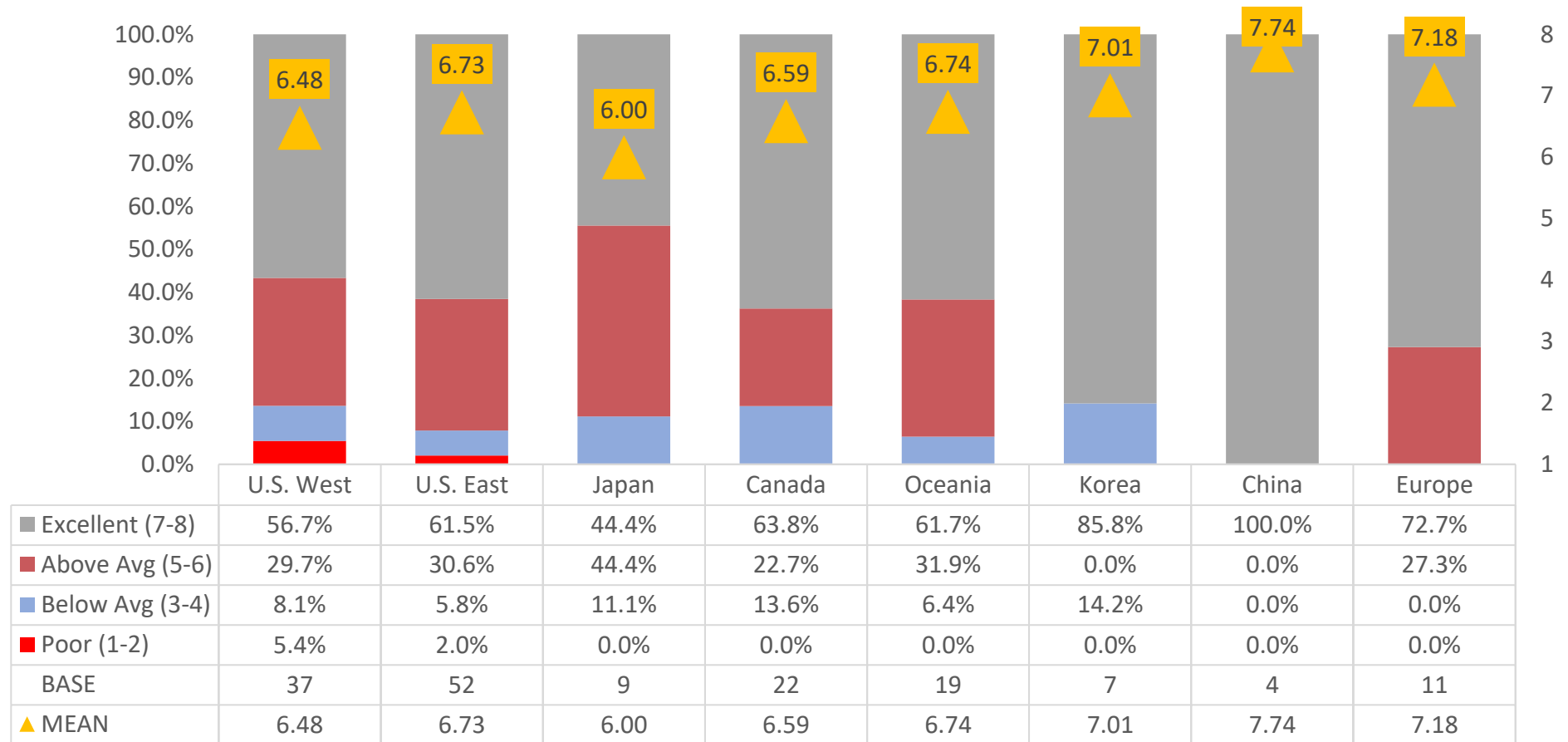
OVERALL ACCESSIBILITY - AIRPORTS

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



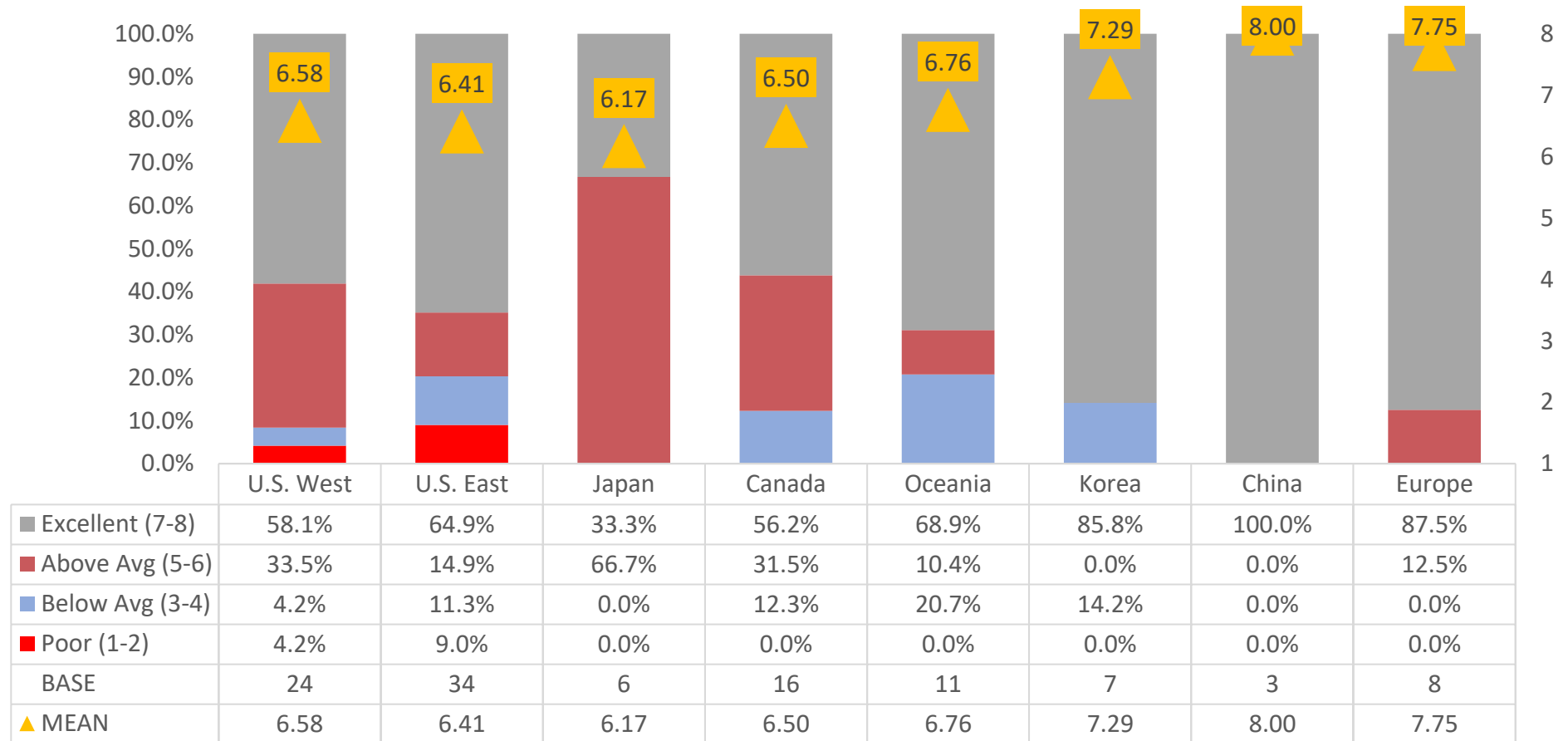
OVERALL ACCESSIBILITY - PRIVATE TRANSPORTATION

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



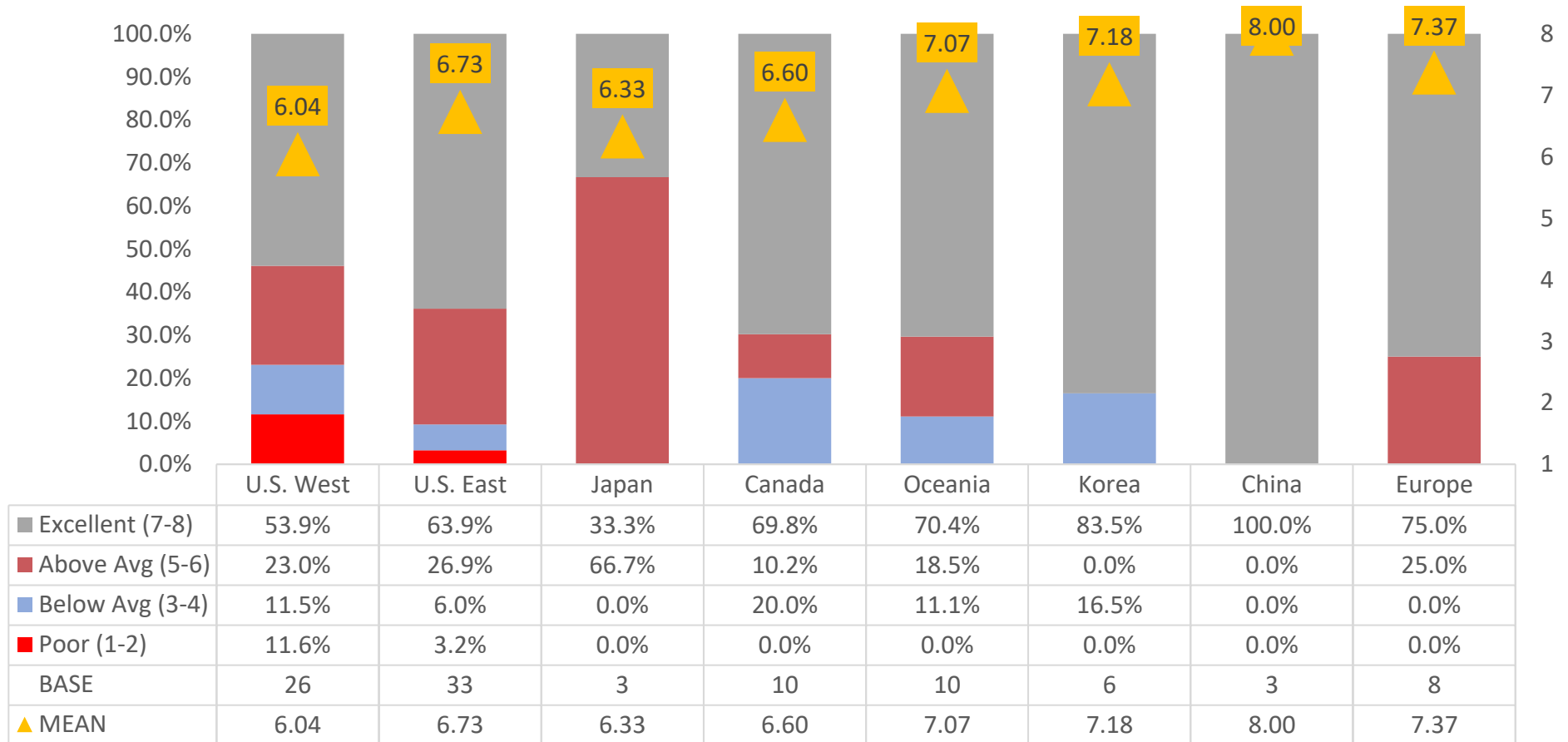
OVERALL ACCESSIBILITY - PUBLIC TRANSPORTATION

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



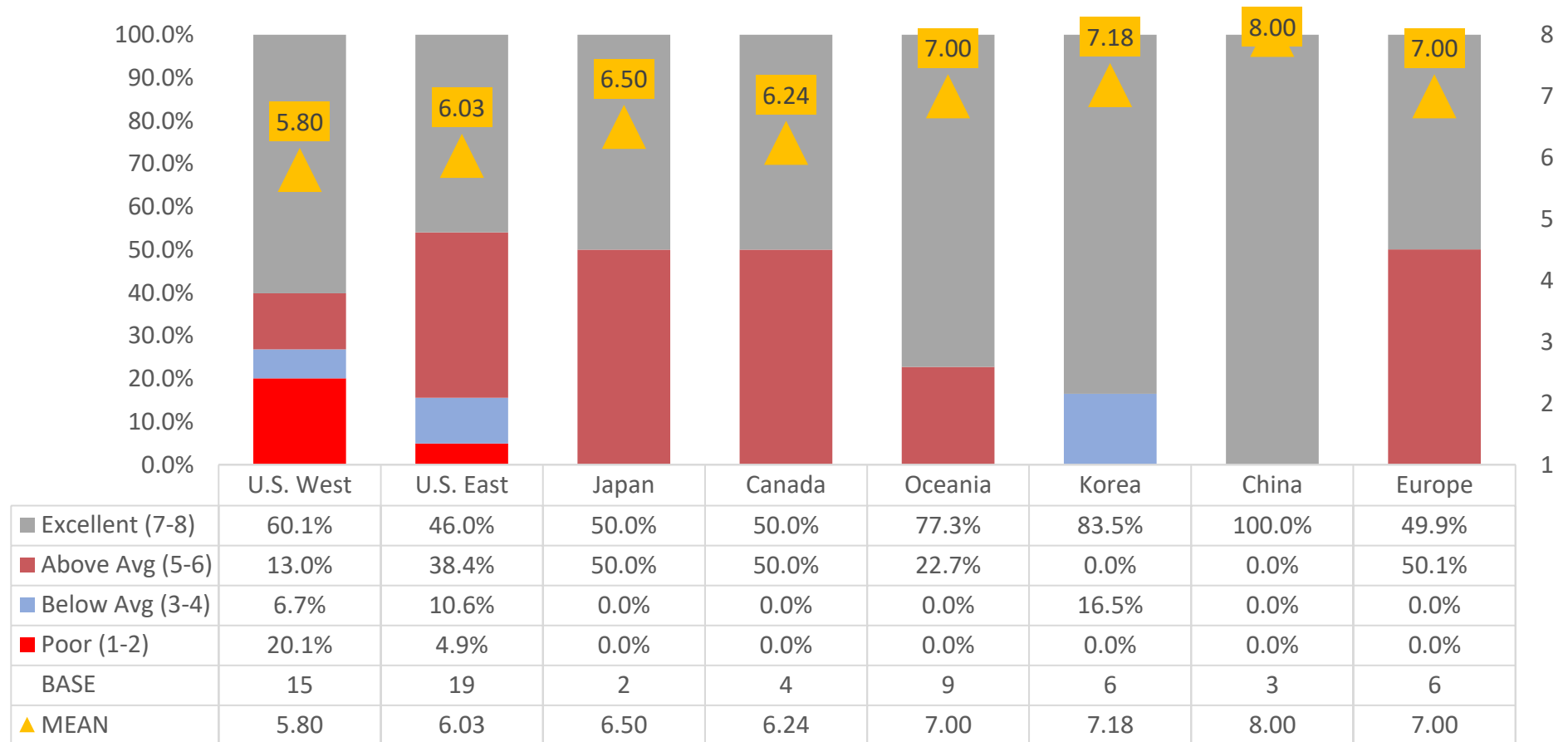
OVERALL ACCESSIBILITY - RIDE SHARE/ CAR SHARE

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



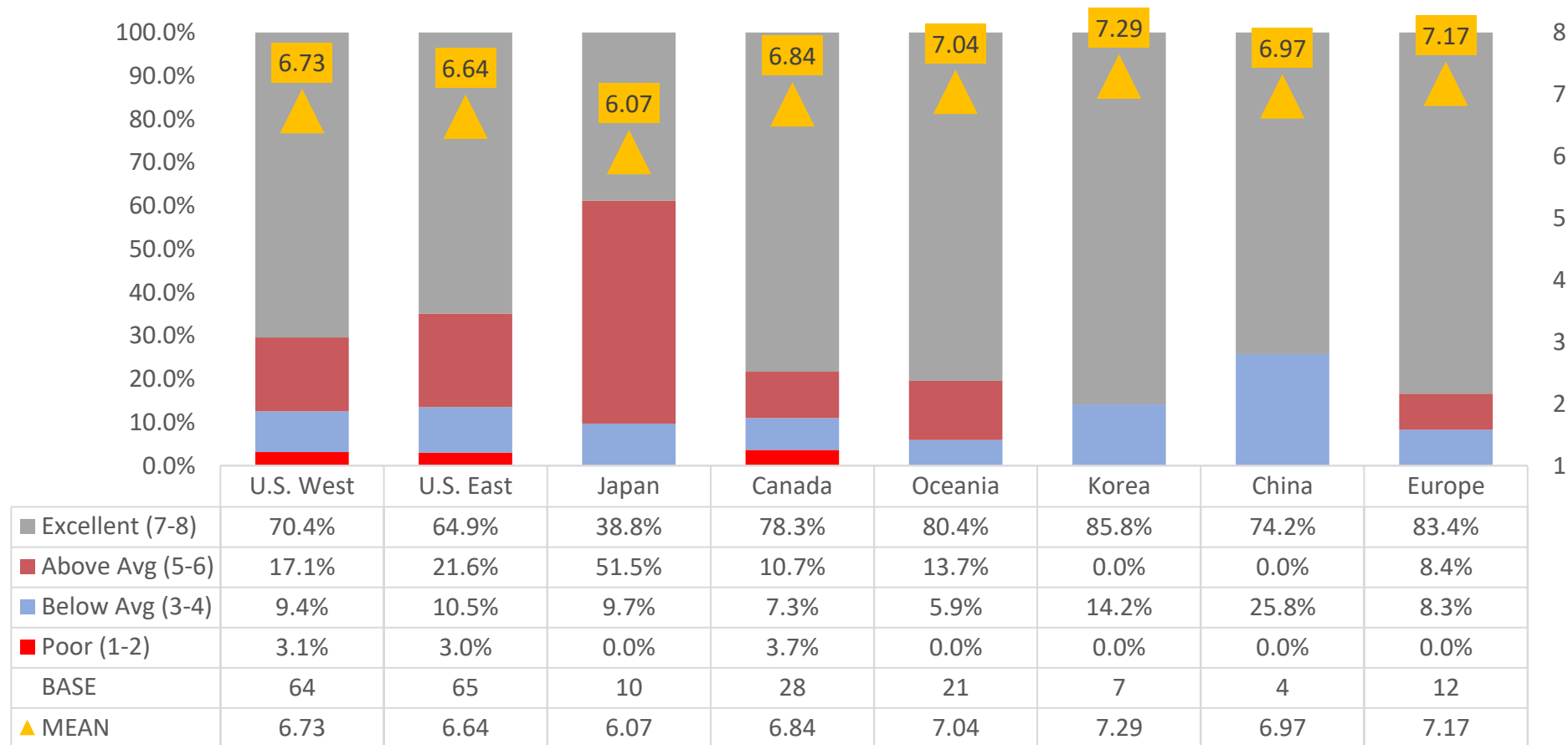
OVERALL ACCESSIBILITY - DEPARTMENT OF AGRICULTURE ANIMAL QUARANTINE

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



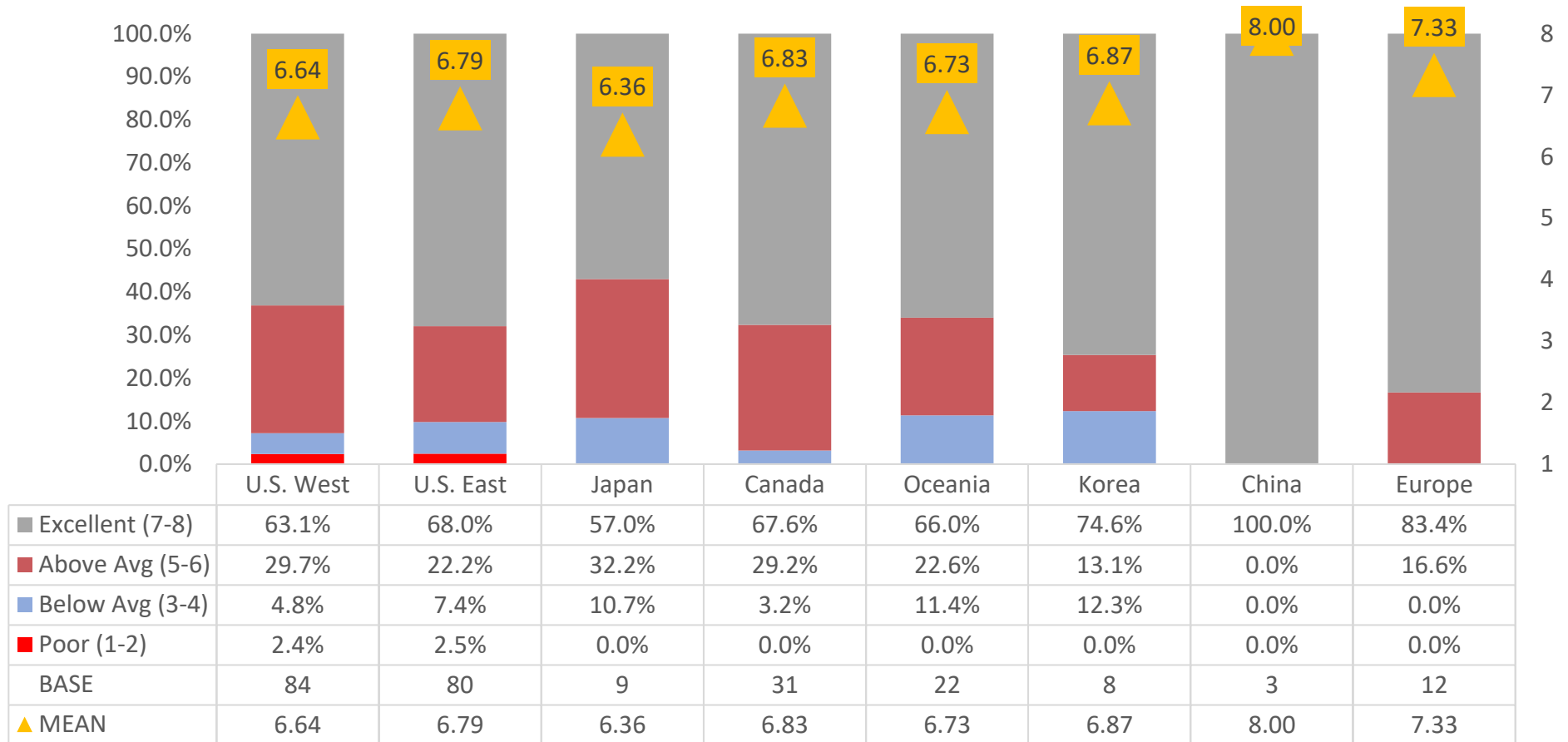
OVERALL ACCESSIBILITY - HOTELS

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



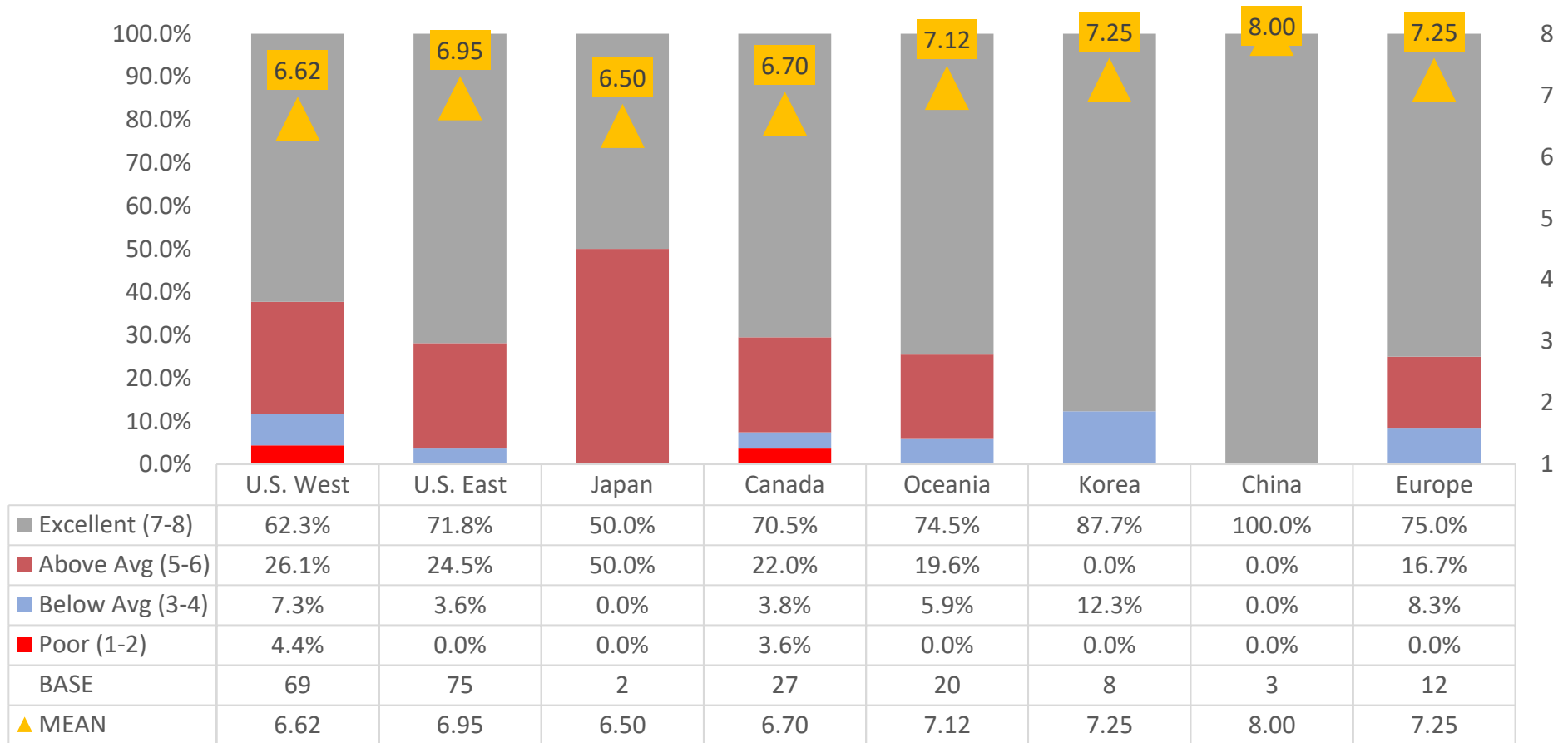
OVERALL ACCESSIBILITY - RESTAURANTS

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



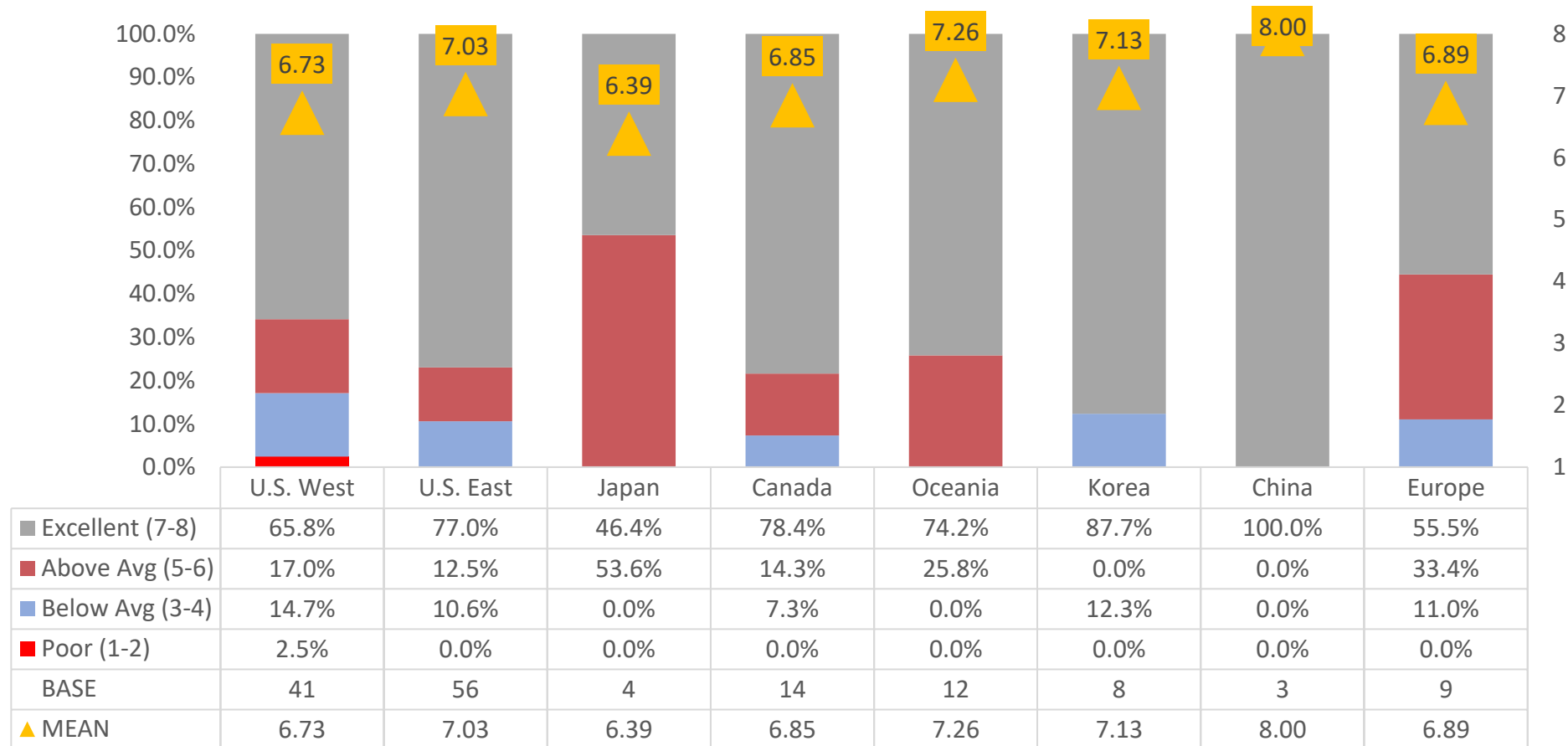
OVERALL ACCESSIBILITY - PUBLIC ATTRACTIONS

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



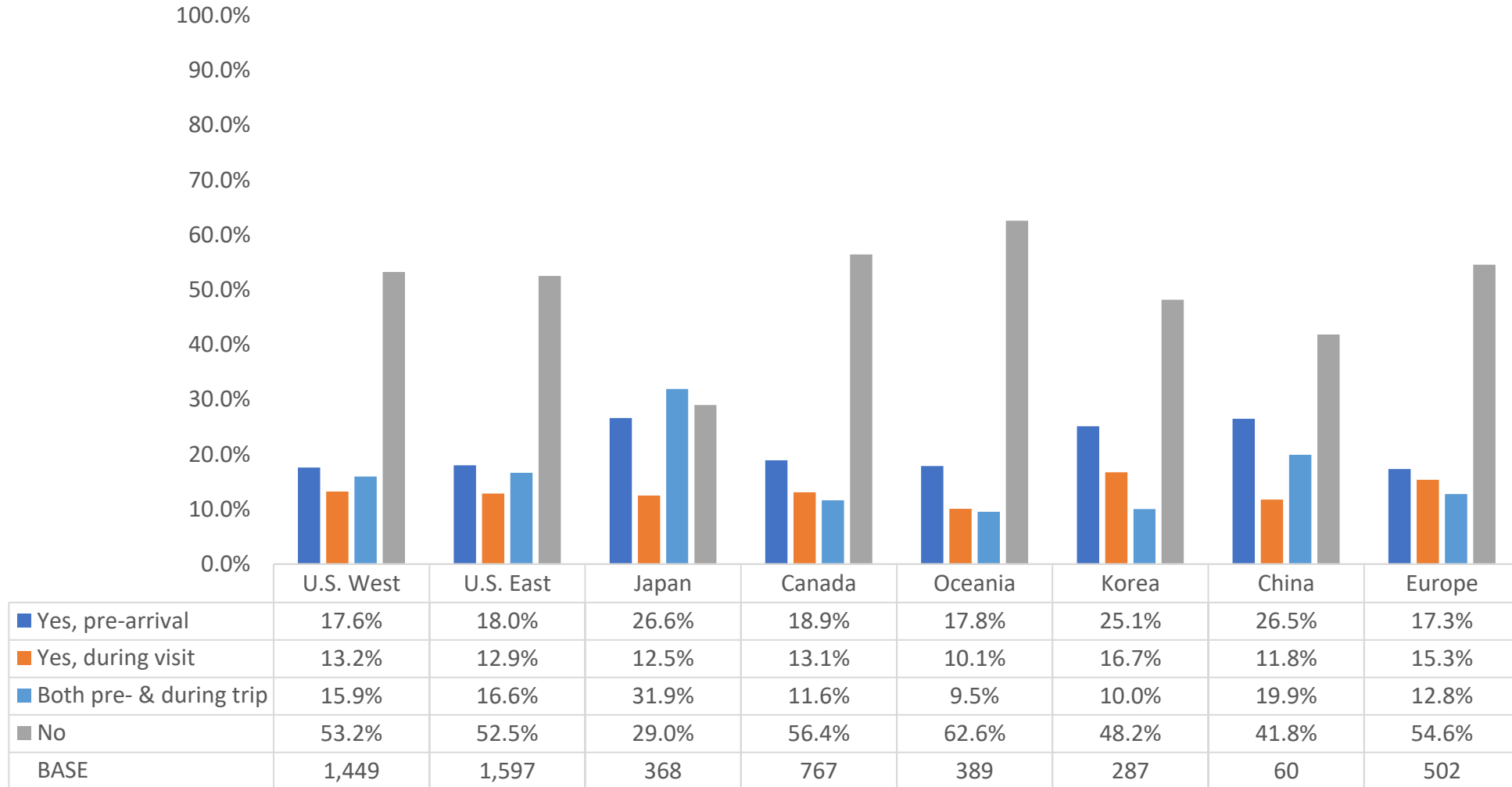
OVERALL ACCESSIBILITY - PRIVATE ATTRACTIONS

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

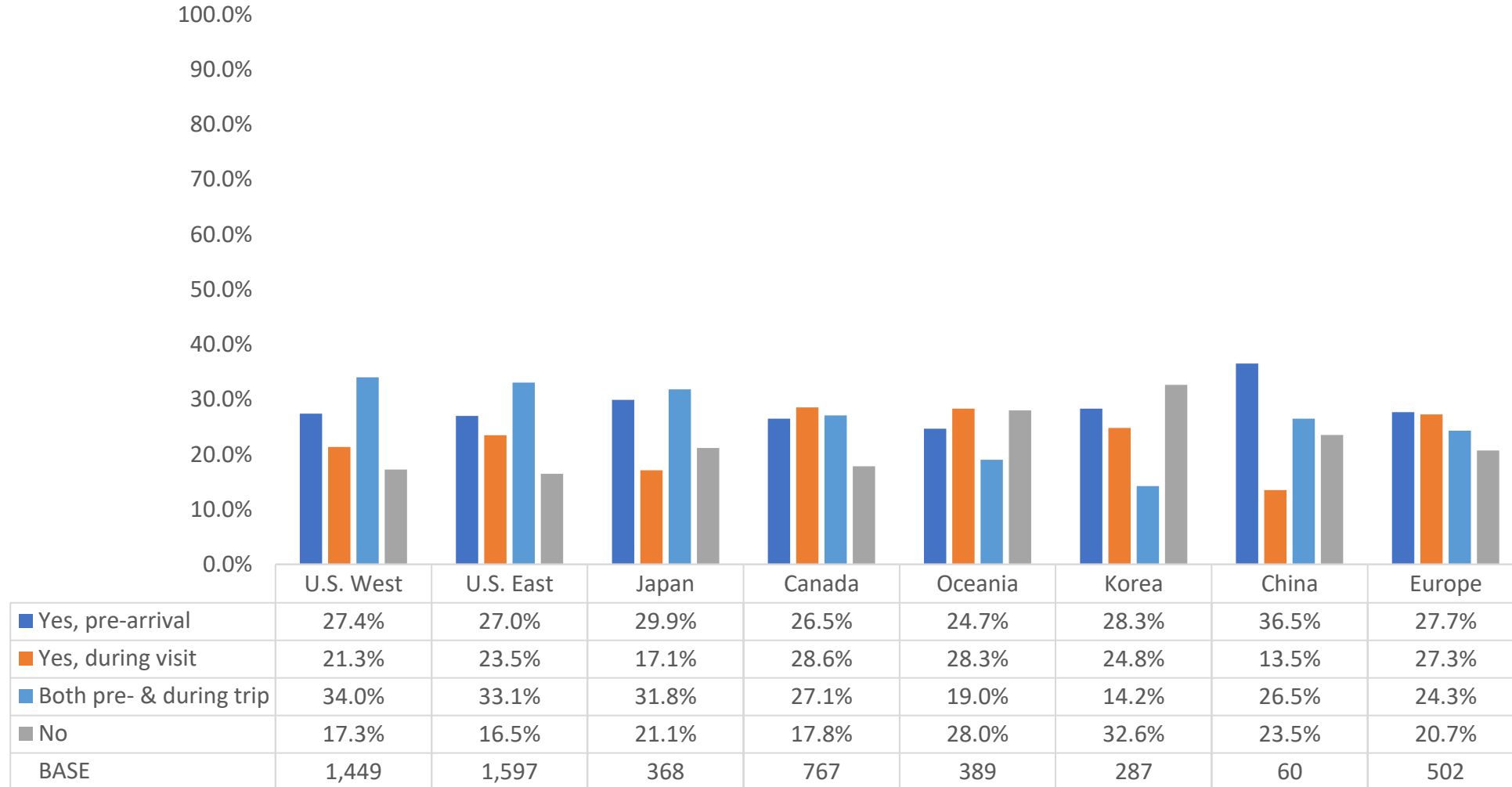


Section 4 – Alternative Messaging

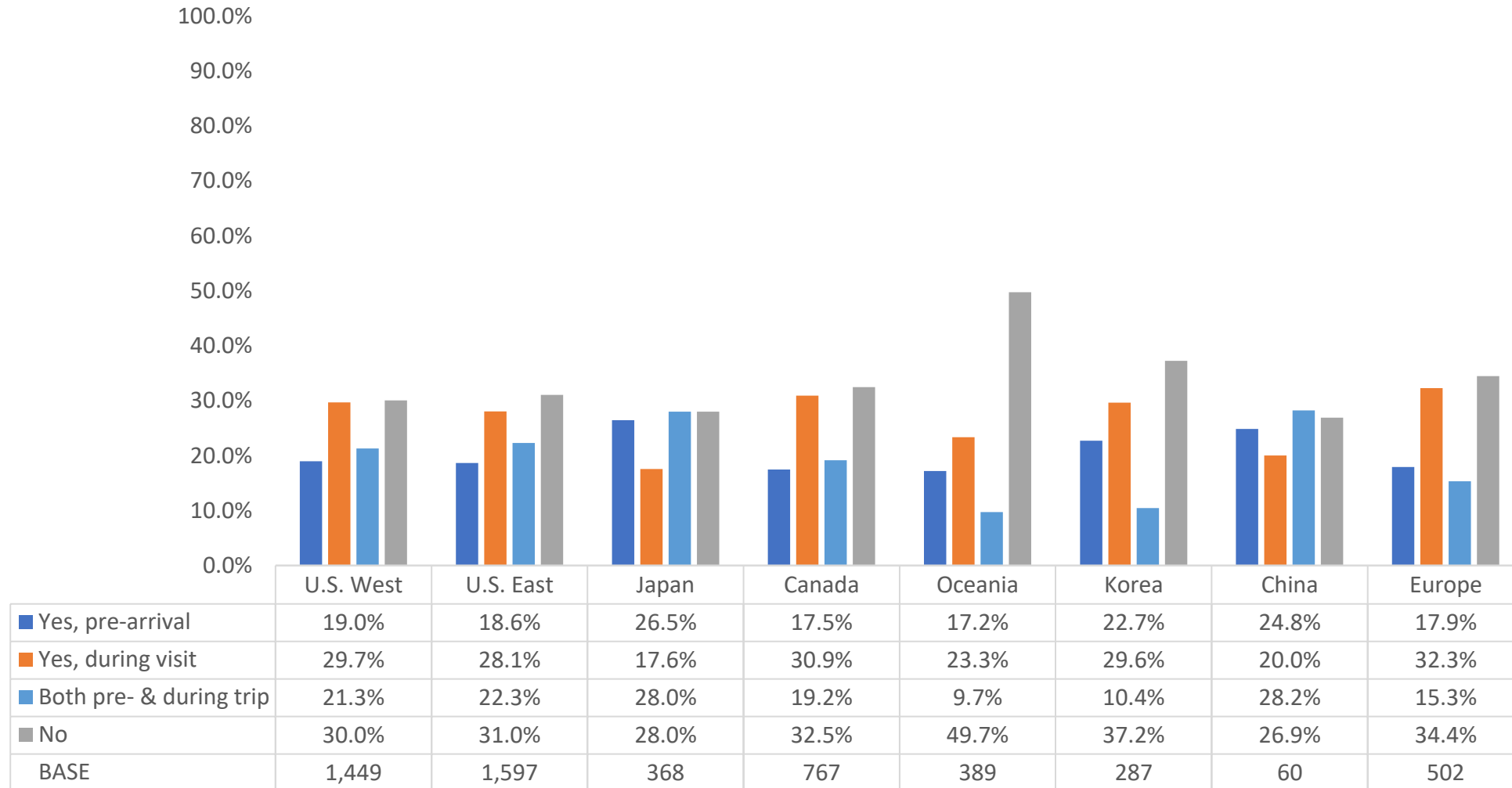
SAFE AND RESPONSIBLE TRAVEL



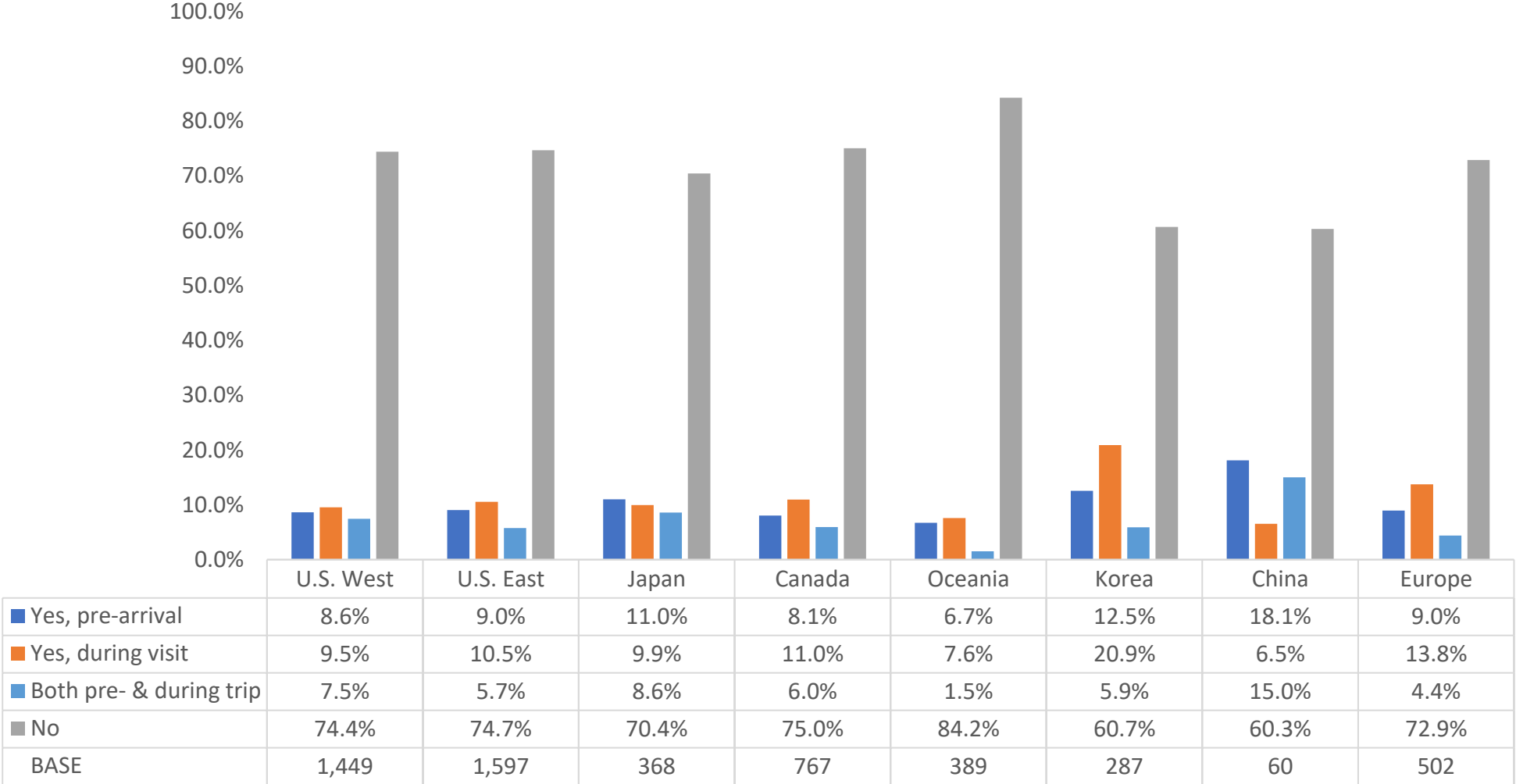
CARING FOR AND RESPECTING HAWAII'S CULTURE, PEOPLE AND ENVIRONMENT



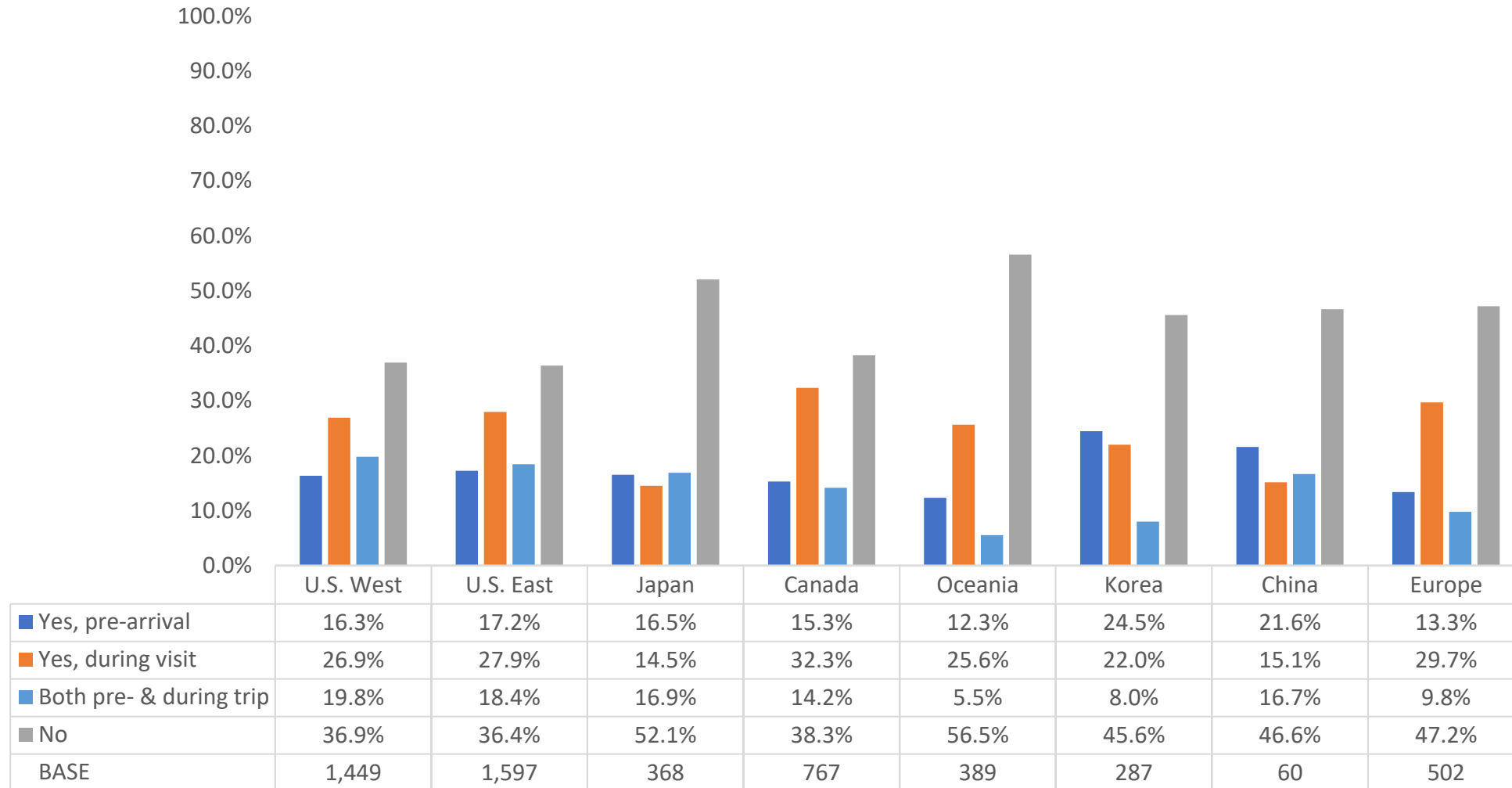
OCEAN AND HIKING SAFETY



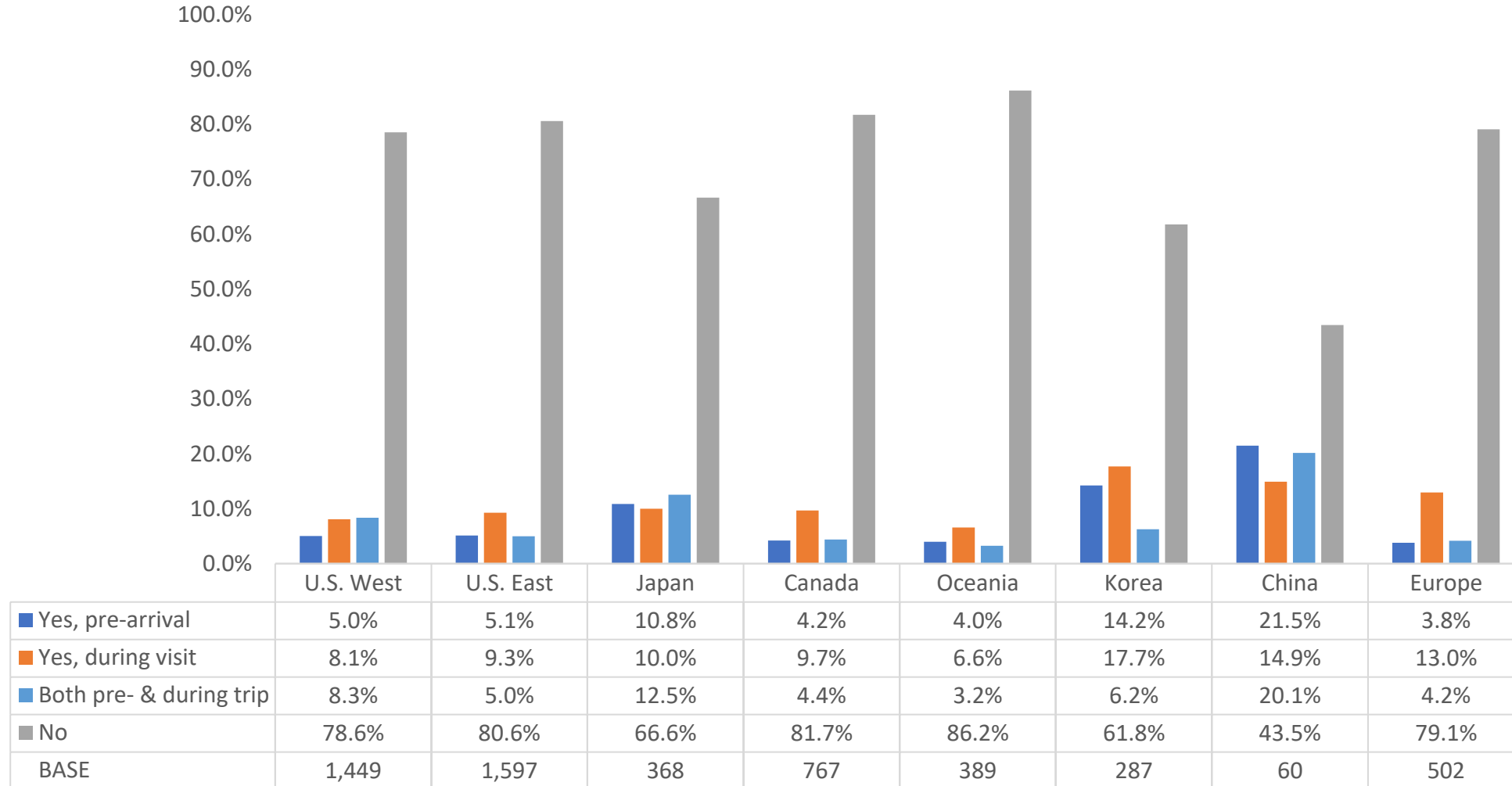
VOLUNTEER / GIVE-BACK OPPORTUNITIES



SUPPORT LOCAL / SHOP LOCAL



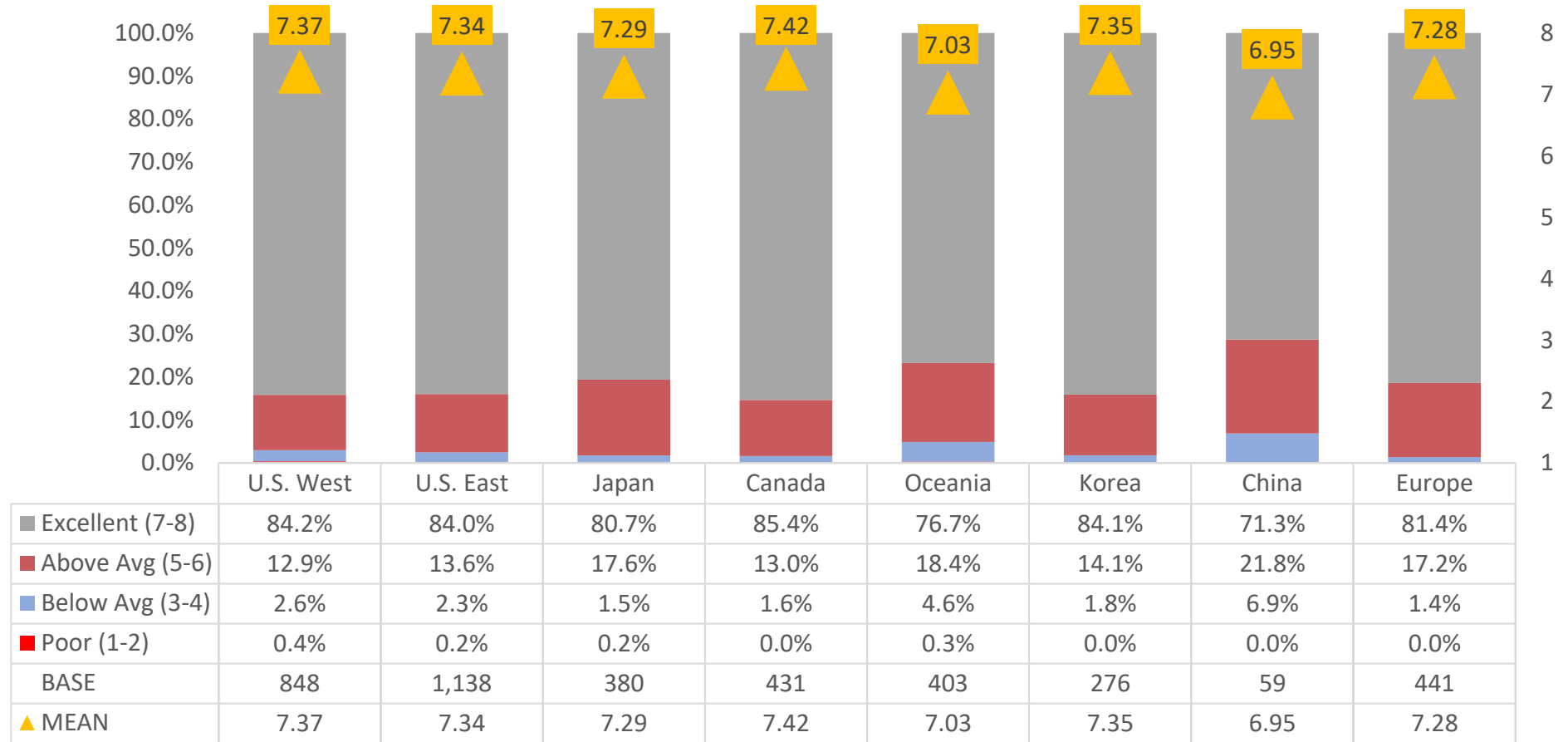
MĀLAMA HAWAI‘I



Section 5 – O‘ahu

SATISFACTION - O'AHU

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



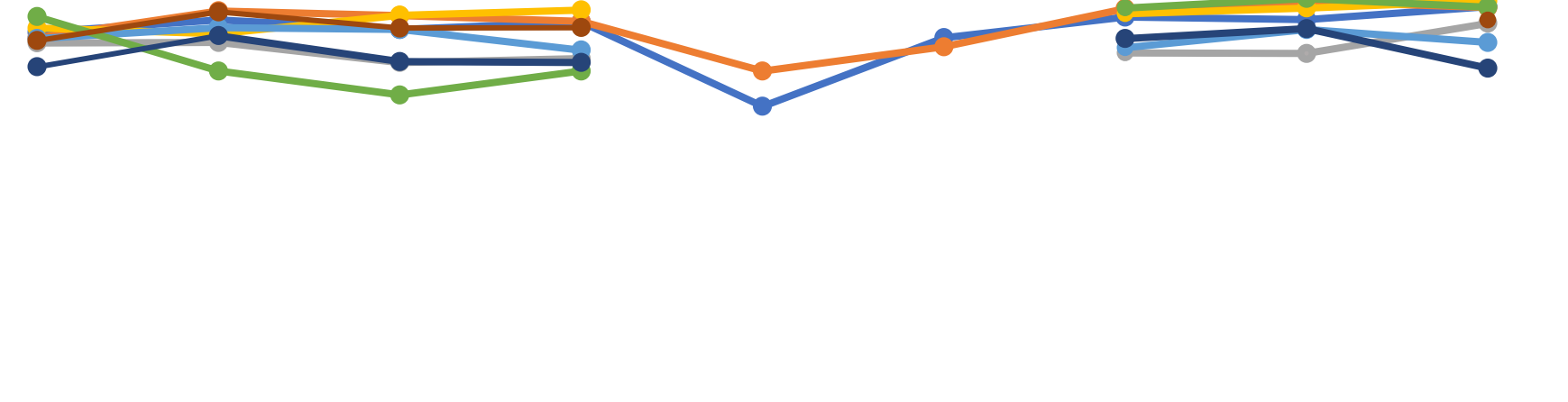
SATISFACTION - O'AHU

- **Gender:** Female respondents from **U.S. West** expressed higher levels of satisfaction compared to male respondents from this visitor market.
- **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** and **U.S. East** 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%



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	78.8%	81.4%	79.4%	81.0%	63.3%	77.7%	82.0%	81.5%	84.2%
U.S. East	77.7%	83.3%	82.3%	81.1%	70.7%	75.8%	83.8%	85.3%	84.0%
Japan	76.6%	76.7%	72.5%	73.3%			74.5%	74.4%	80.7%
Canada	79.7%	78.5%	82.4%	83.5%			82.7%	83.9%	85.4%
Oceania	77.5%	79.8%	79.4%	75.1%			75.6%	79.4%	76.7%
Korea	82.1%	70.7%	65.7%	70.7%			83.9%	85.9%	84.1%
China	71.6%	78.1%	72.7%	72.5%			77.5%	79.6%	71.3%
Europe	77.1%	83.1%	79.7%	79.8%					81.4%

P= Preliminary Data

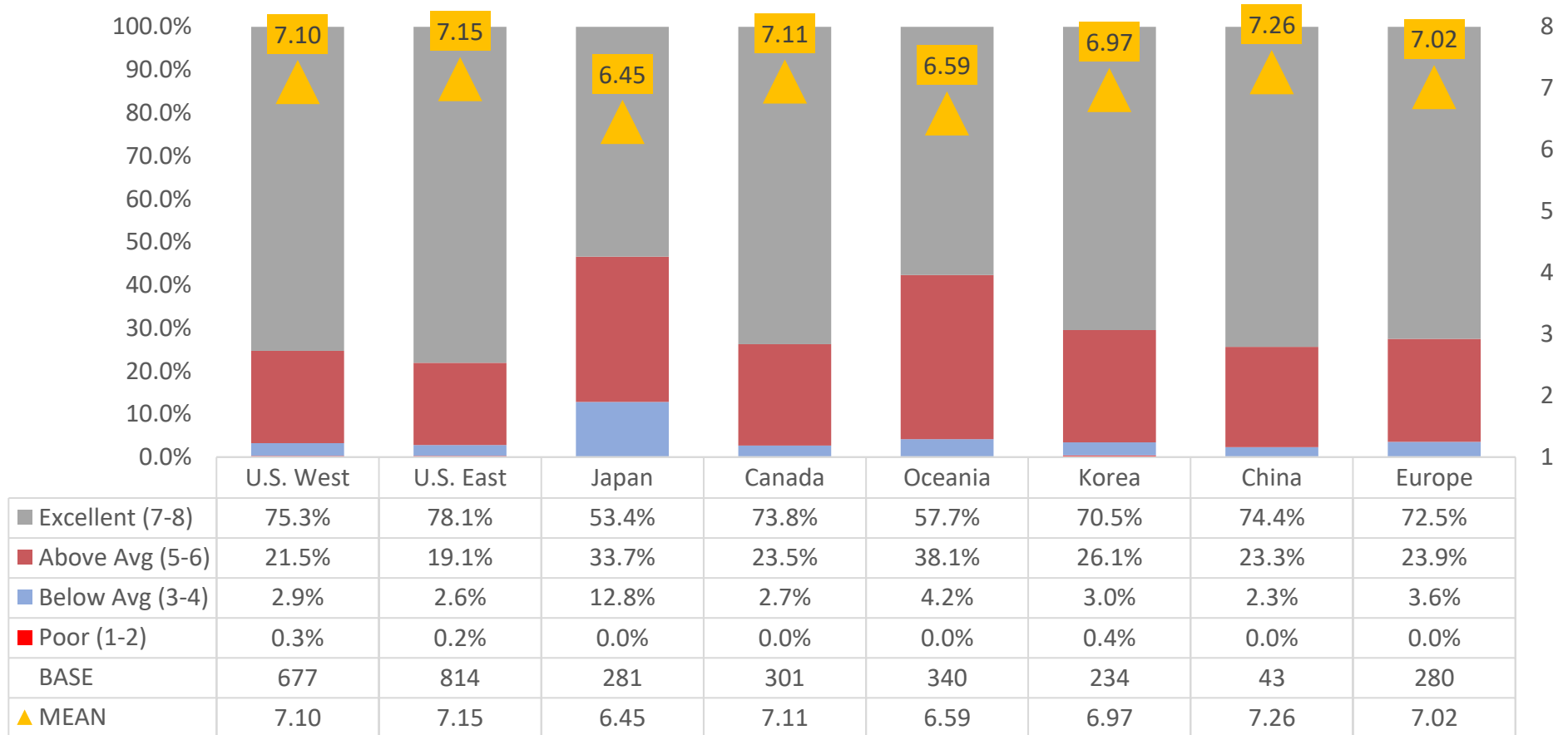
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



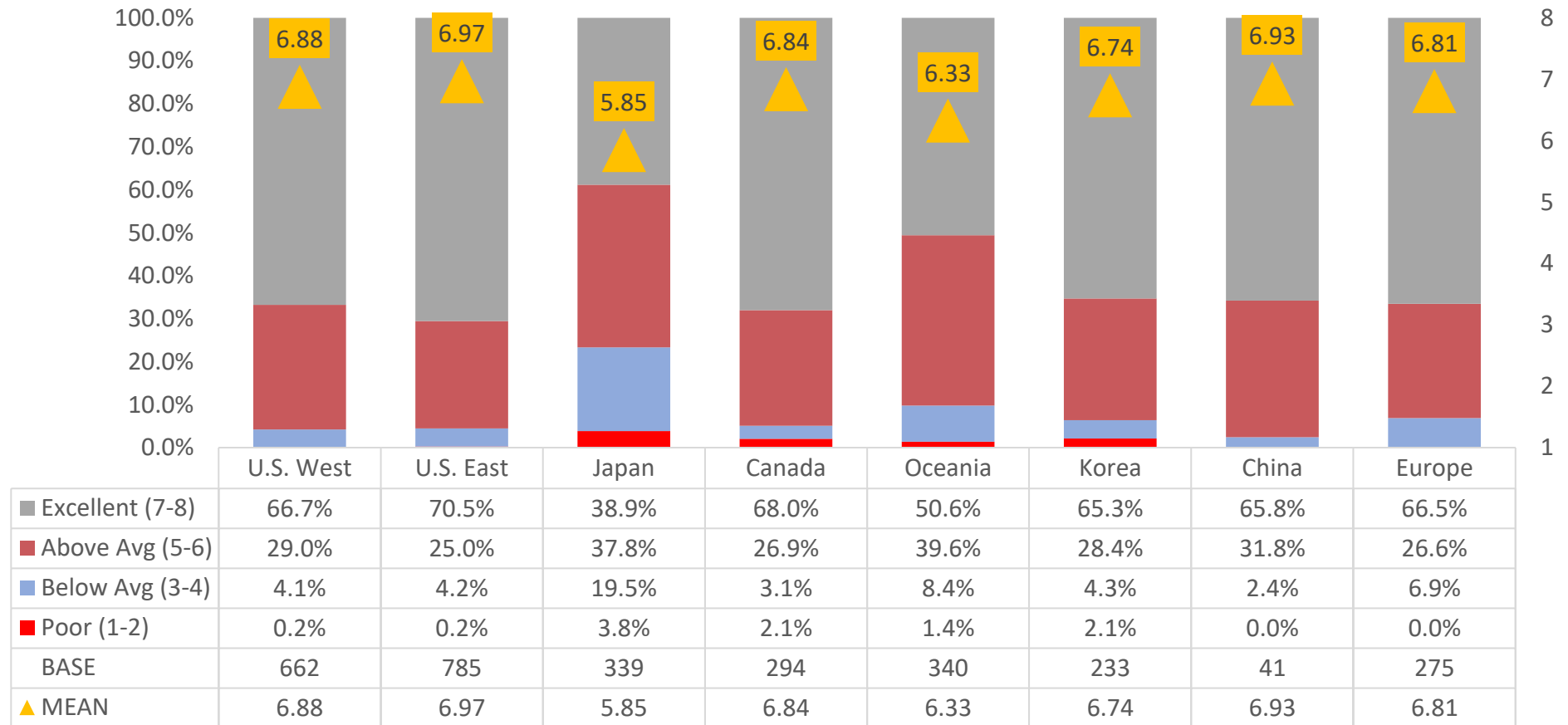
ENTERTAINMENT/ ATTRACTIONS - O‘AHU

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



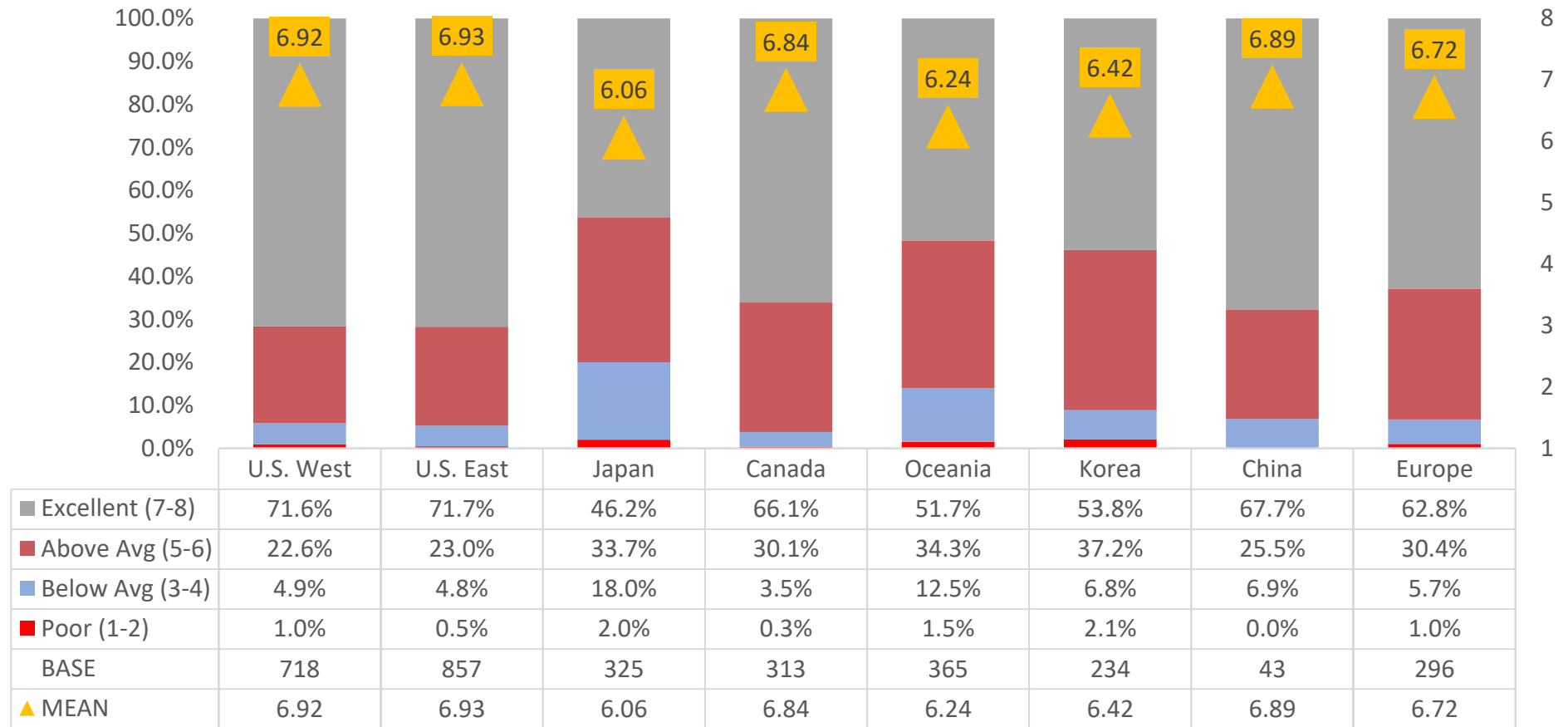
SHOPPING - O'AHU

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



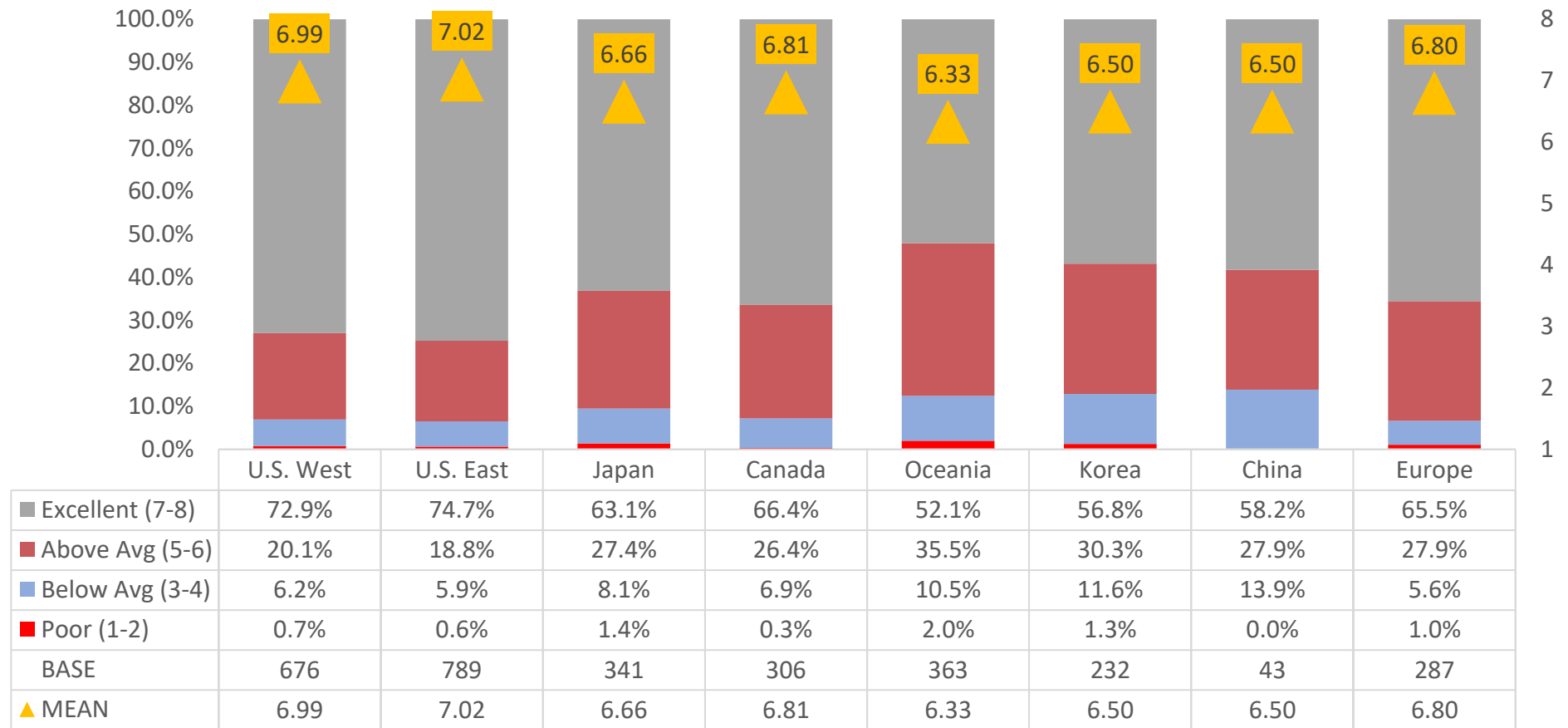
DINING/ FOOD & BEVERAGES - O'AHU

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



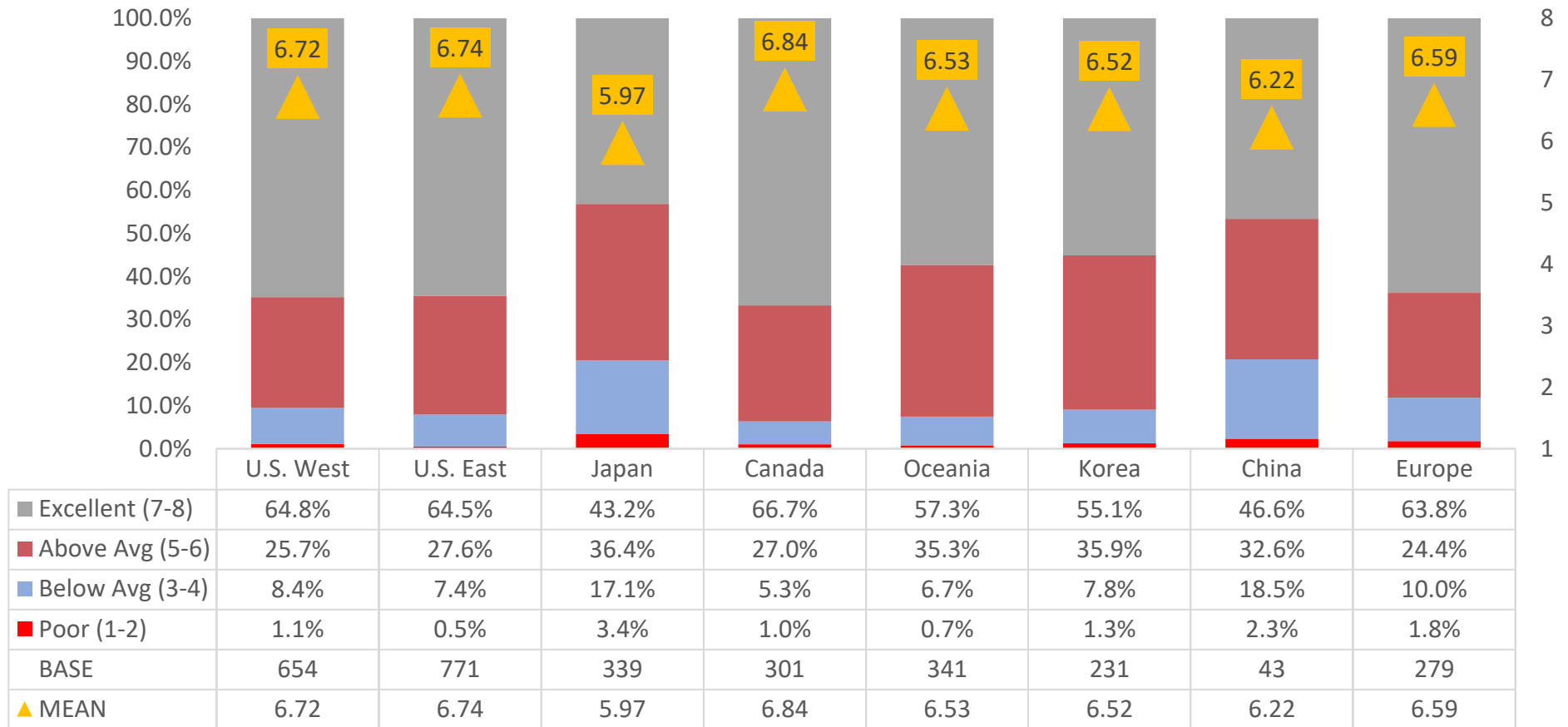
LODGING/ ACOMMODATIONS - O'AHU

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



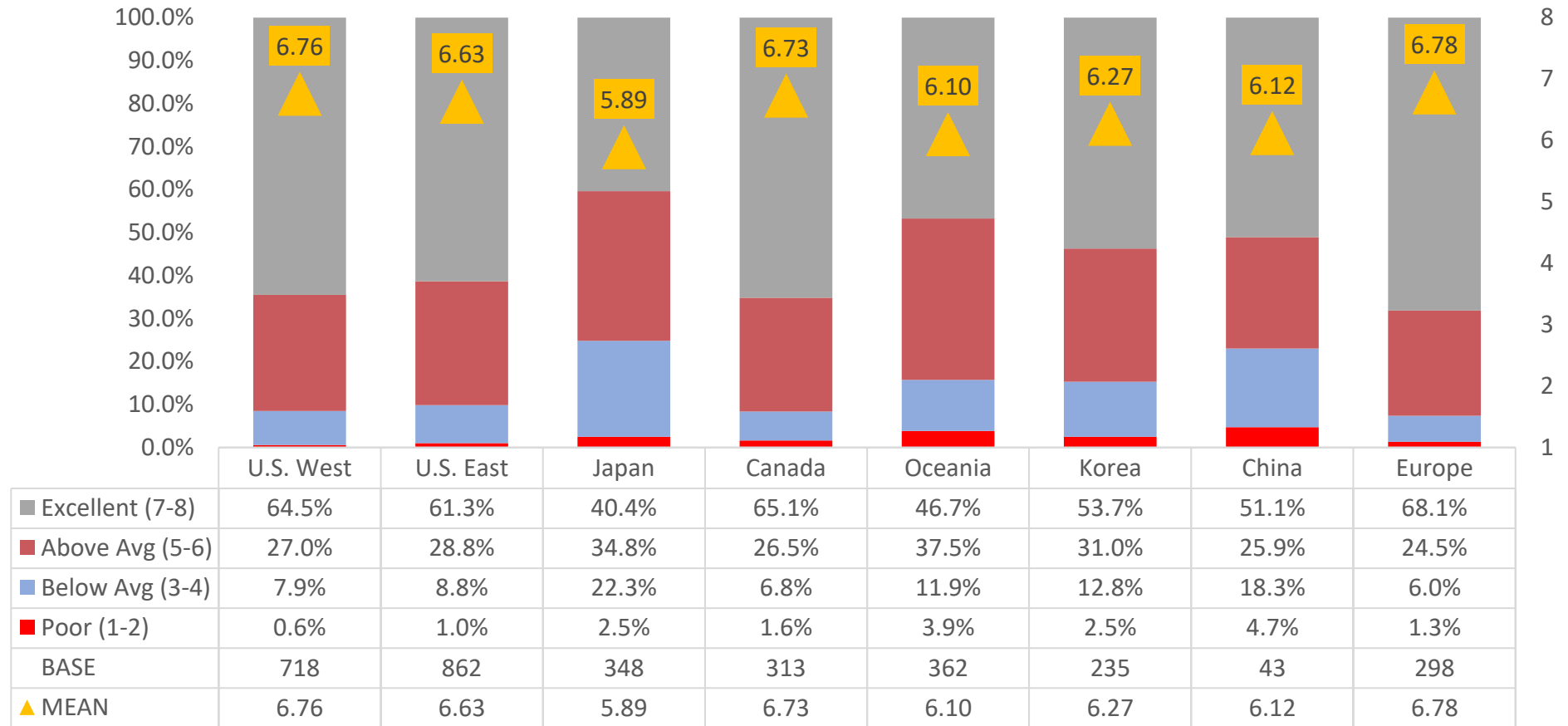
TRANSPORTATION ON ISLAND - O‘AHU

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



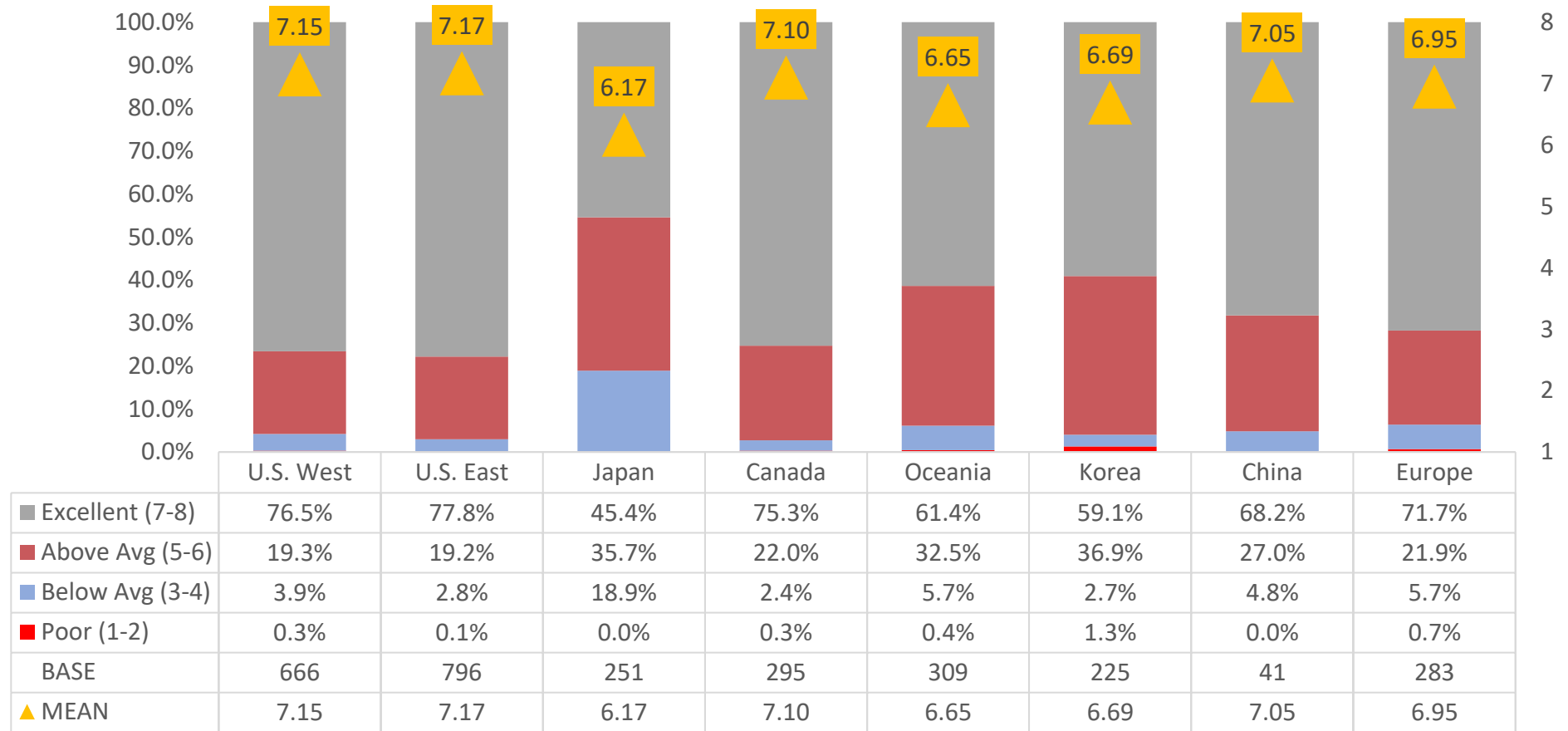
AIRPORT - O'AHU

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



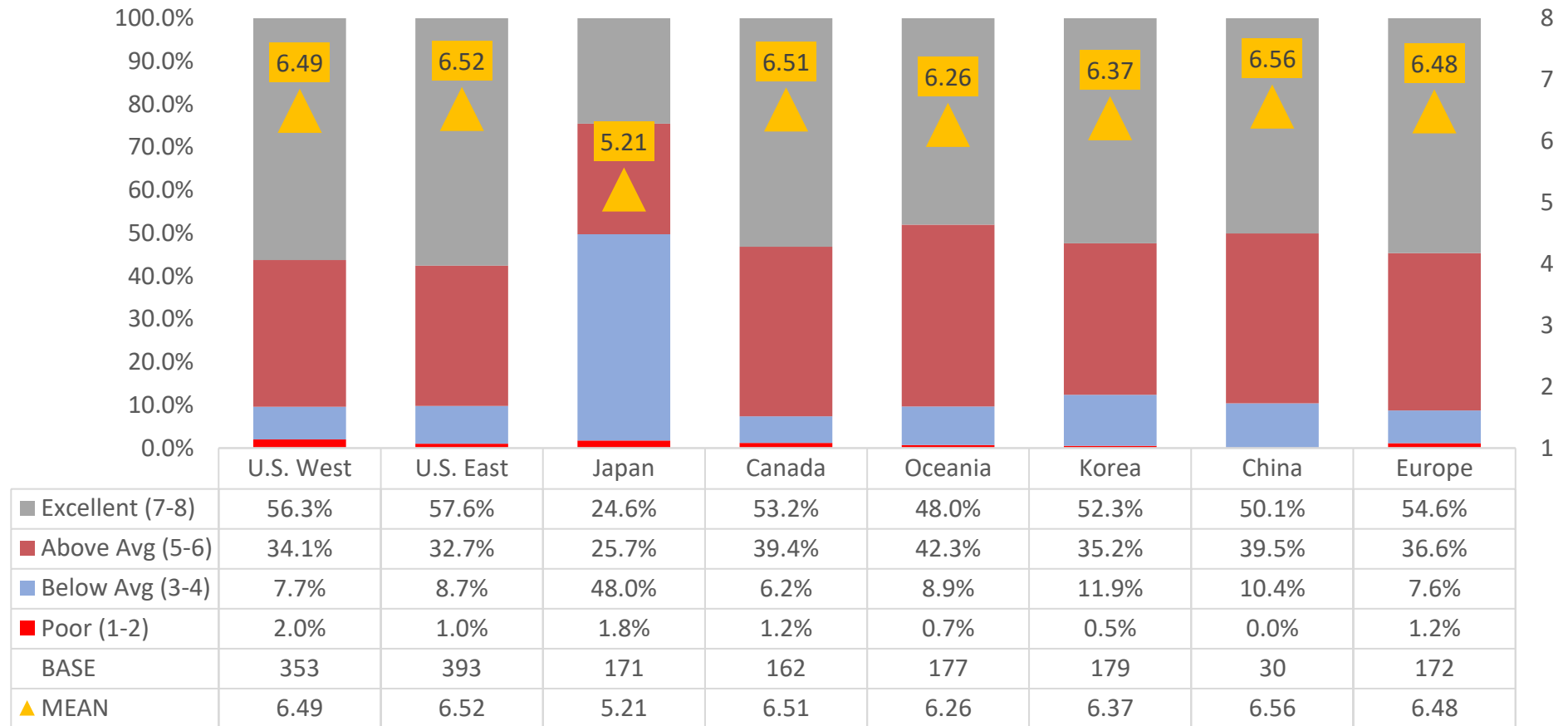
CULTURAL EXPERIENCES - O'AHU

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



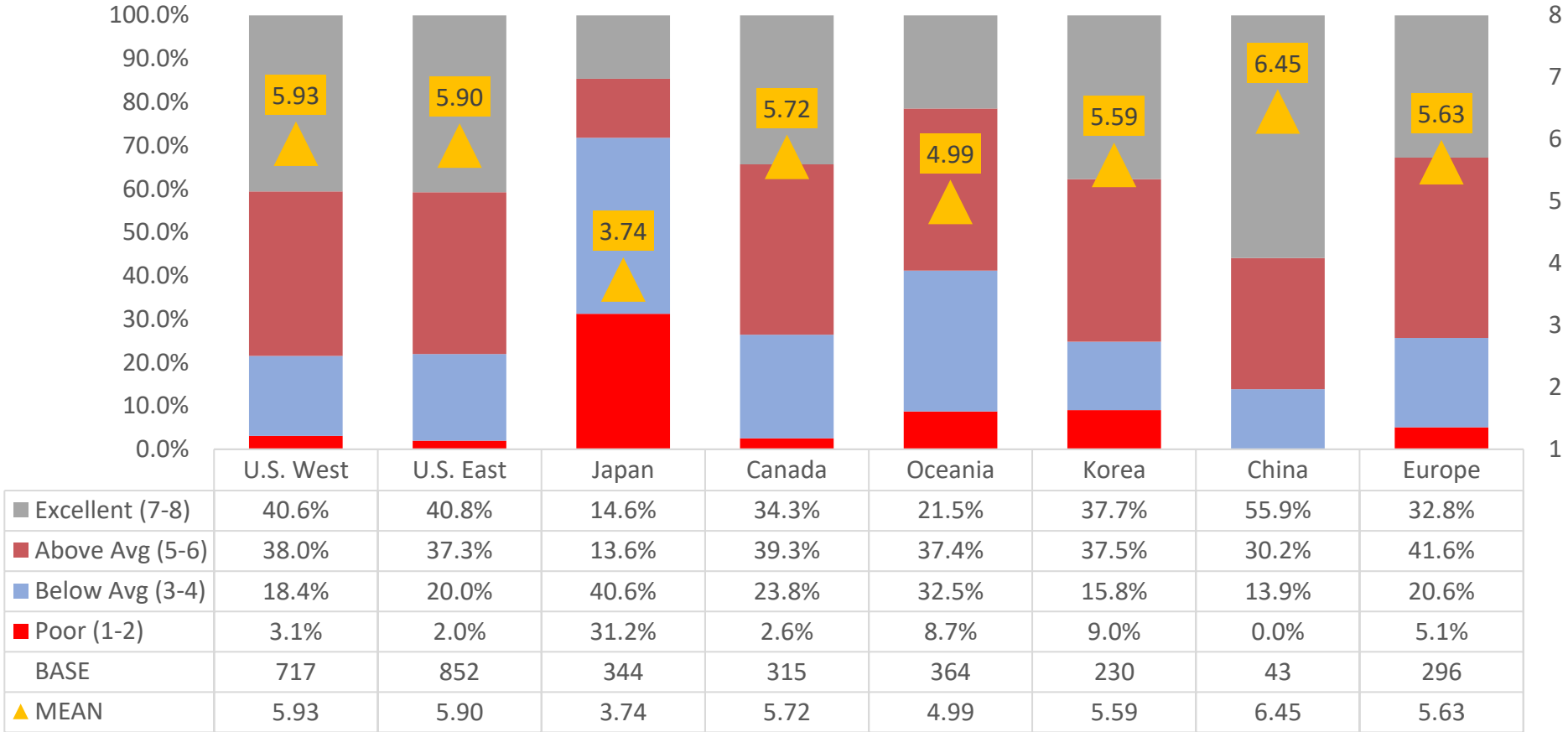
VOLUNTEER EXPERIENCES - O'AHU

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



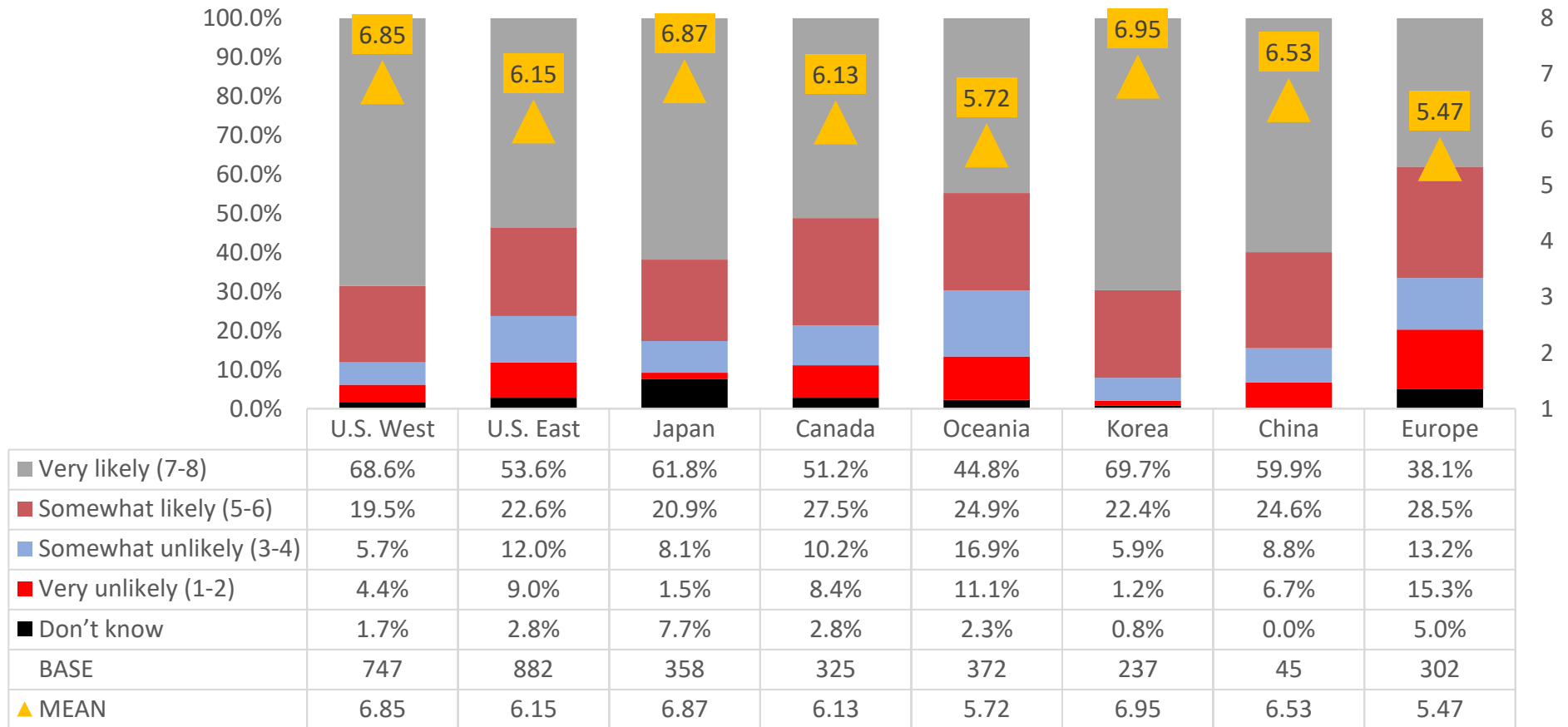
OVERALL VALUE FOR THE MONEY - O'AHU

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



LIKELIHOOD OF RETURN VISIT - O‘AHU

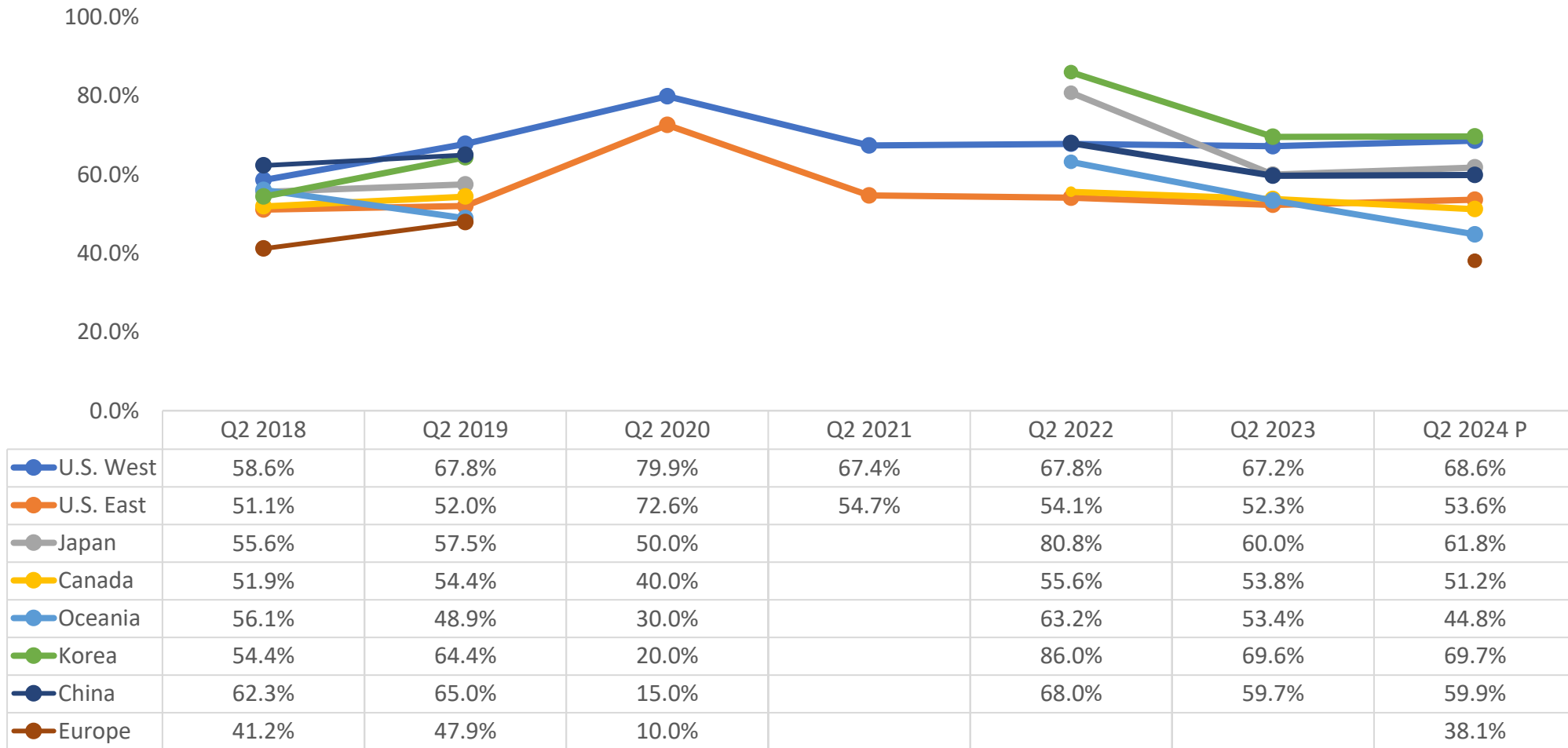
8-pt Rating Scale
8 = Excellent / 1 = Poor



LIKELIHOOD OF RETURN VISIT - O‘AHU

TOP BOX - VERY LIKELY (7-8)

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



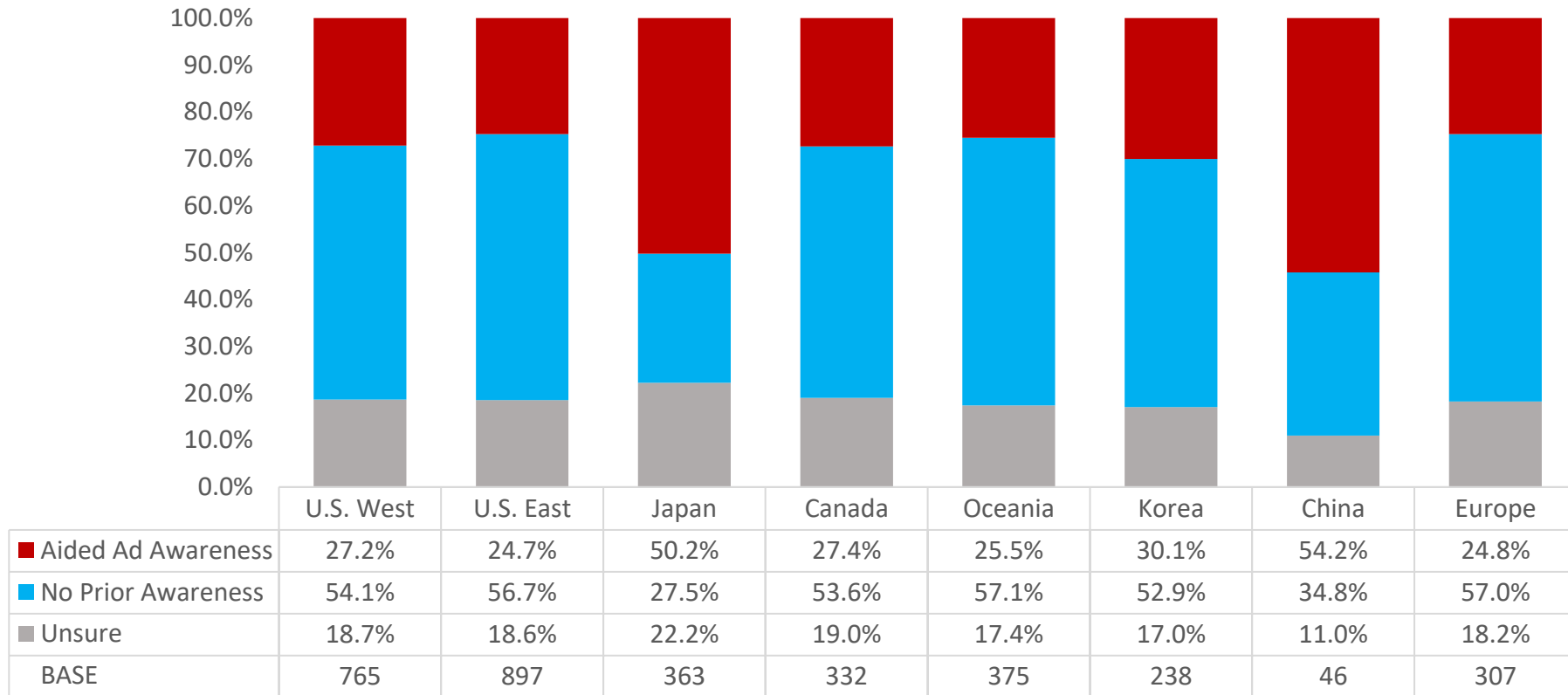
P= Preliminary Data

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.



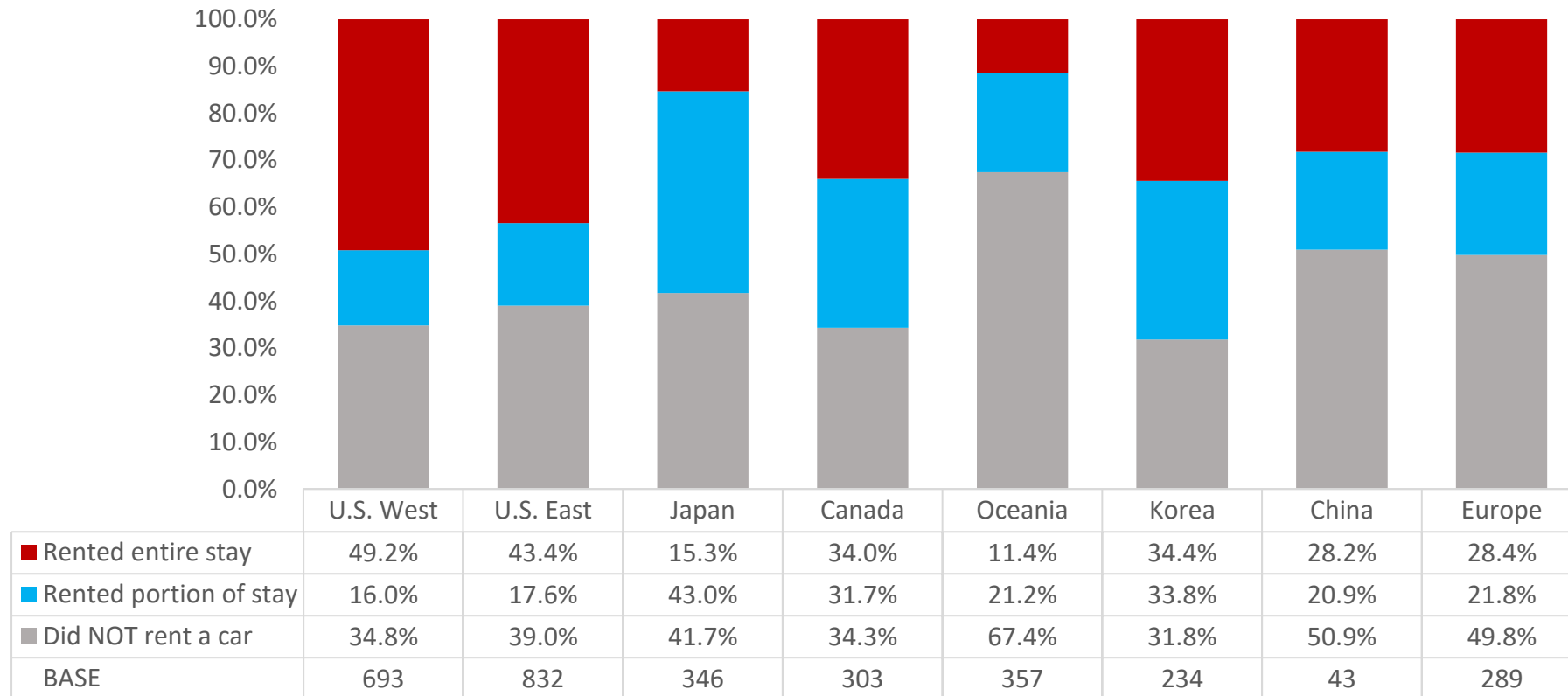
AIDED ADVERTISING AWARENESS - O'AHU



MOTIVATING FACTORS - O'AHU

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	41.2%	47.0%	43.7%	54.5%	48.9%	56.8%	56.7%	55.6%
Hawaiian cultural events	17.7%	15.4%	16.9%	16.4%	13.4%	19.8%	4.8%	11.8%
Social media posts and videos	14.3%	13.2%	31.3%	22.8%	11.7%	21.7%	19.3%	20.4%
Television programs or movies filmed in Hawai'i	7.9%	10.5%	42.9%	17.0%	16.3%	21.8%	17.3%	29.6%
Outdoor or sporting activities and events	14.8%	11.6%	11.8%	18.4%	7.9%	17.5%	9.8%	11.5%
Hawaiian music	8.7%	6.8%	15.8%	7.8%	6.2%	11.1%	1.7%	5.3%
BASE	759	894	361	331	375	46	237	304

CAR RENTAL - O'AHU



REASONS FOR PARTIAL RENTAL CAR - O'AHU

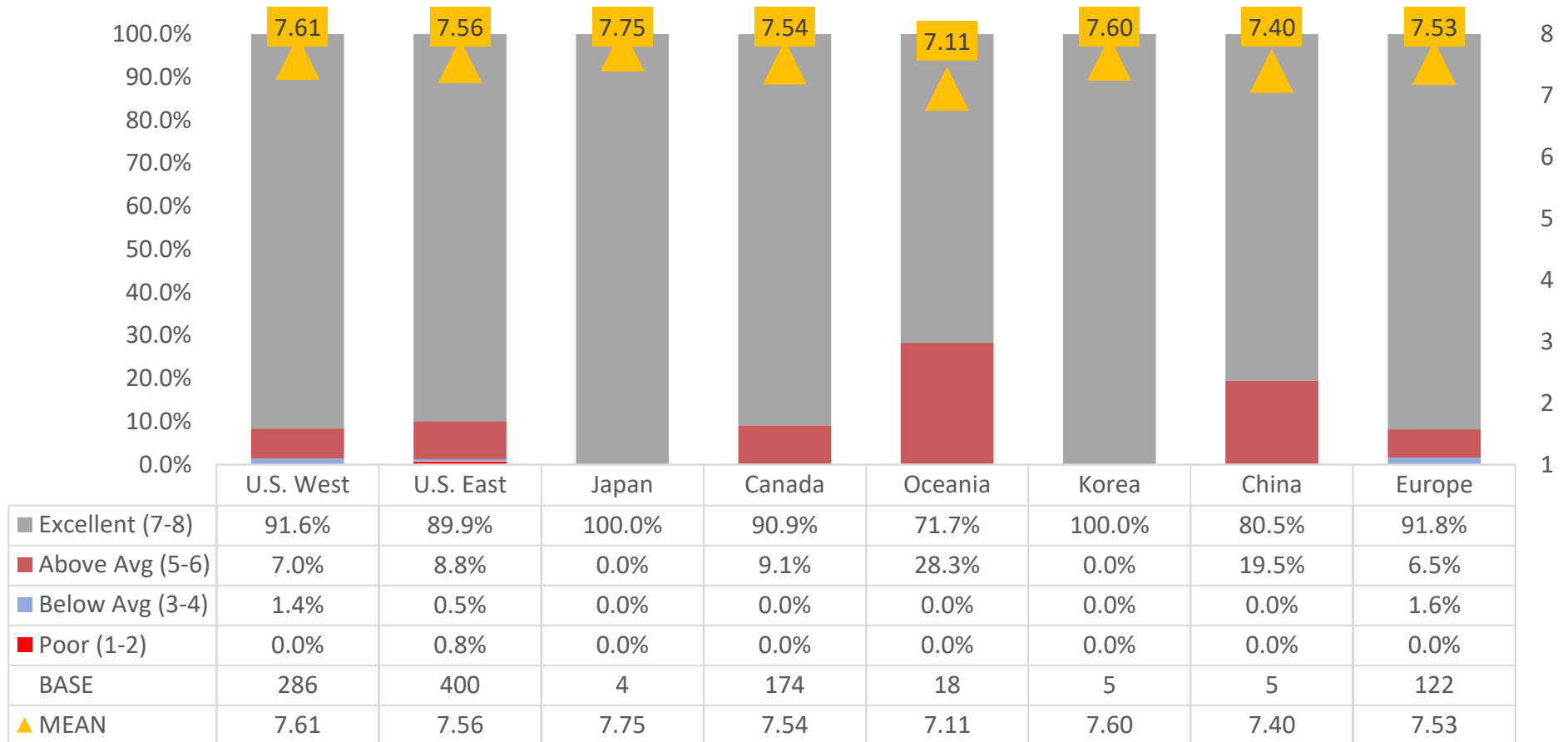
	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
I only needed a vehicle on certain dates	70.2%	78.2%	83.3%	71.2%	83.8%	43.8%	56.7%	83.9%
Parking was too expensive at my hotel/ lodging	44.1%	35.3%	13.1%	42.6%	28.5%	32.9%	41.5%	37.1%
Car rental rates were too expensive	23.4%	15.5%	15.9%	31.0%	24.0%	11.0%	30.4%	24.2%
Wanted to reduce my carbon footprint	9.0%	4.8%	3.7%	9.6%	6.7%	11.0%	0.0%	16.1%
Vehicles were not available for all of my trip dates	4.5%	3.4%	2.7%	1.1%	0.0%	34.2%	8.9%	1.6%
BASE	111	144	148	94	77	9	79	62



Section 6 – Kaua‘i

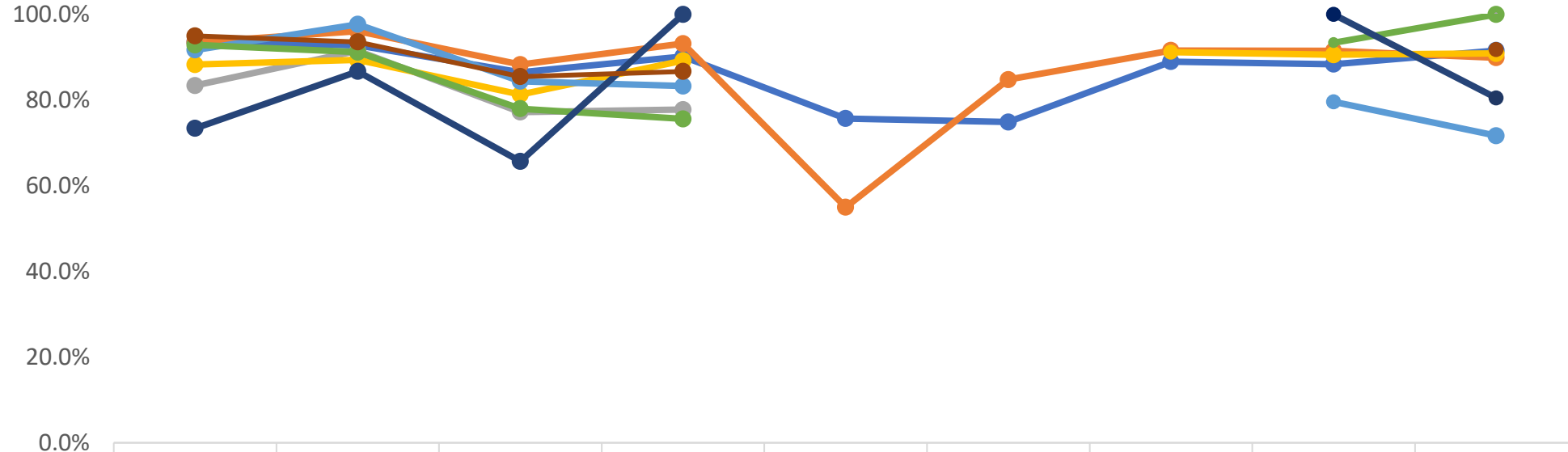
SATISFACTION - KAUA'I

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



SATISFACTION - KAUA'I

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



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	93.6%	92.8%	86.5%	90.2%	75.7%	74.9%	89.0%	88.4%	91.6%
U.S. East	93.5%	96.1%	88.3%	93.2%	55.0%	84.8%	91.6%	91.5%	89.9%
Japan	83.4%	91.5%	77.2%	77.8%	40.0%				100.0%
Canada	88.3%	89.4%	81.3%	89.2%	35.0%		91.2%	90.6%	90.9%
Oceania	91.7%	97.7%	84.4%	83.3%	30.0%			79.6%	71.7%
Korea	92.9%	91.2%	78.0%	75.6%	25.0%			93.4%	100.0%
China	73.4%	86.7%	65.7%	100.0%	20.0%			100.0%	80.5%
Europe	95.0%	93.6%	85.5%	86.7%	15.0%				91.8%

P= Preliminary Data

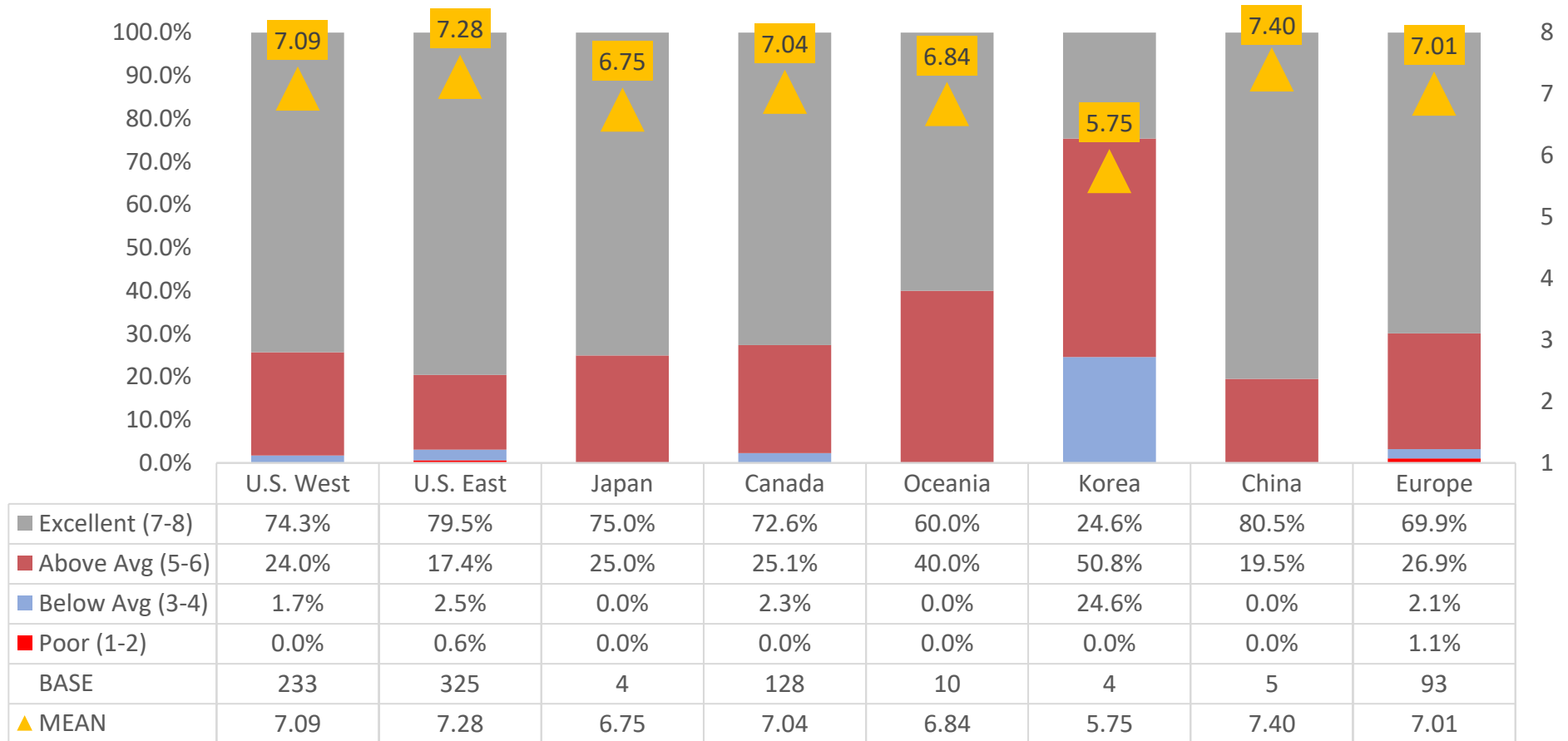
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on ___?

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.



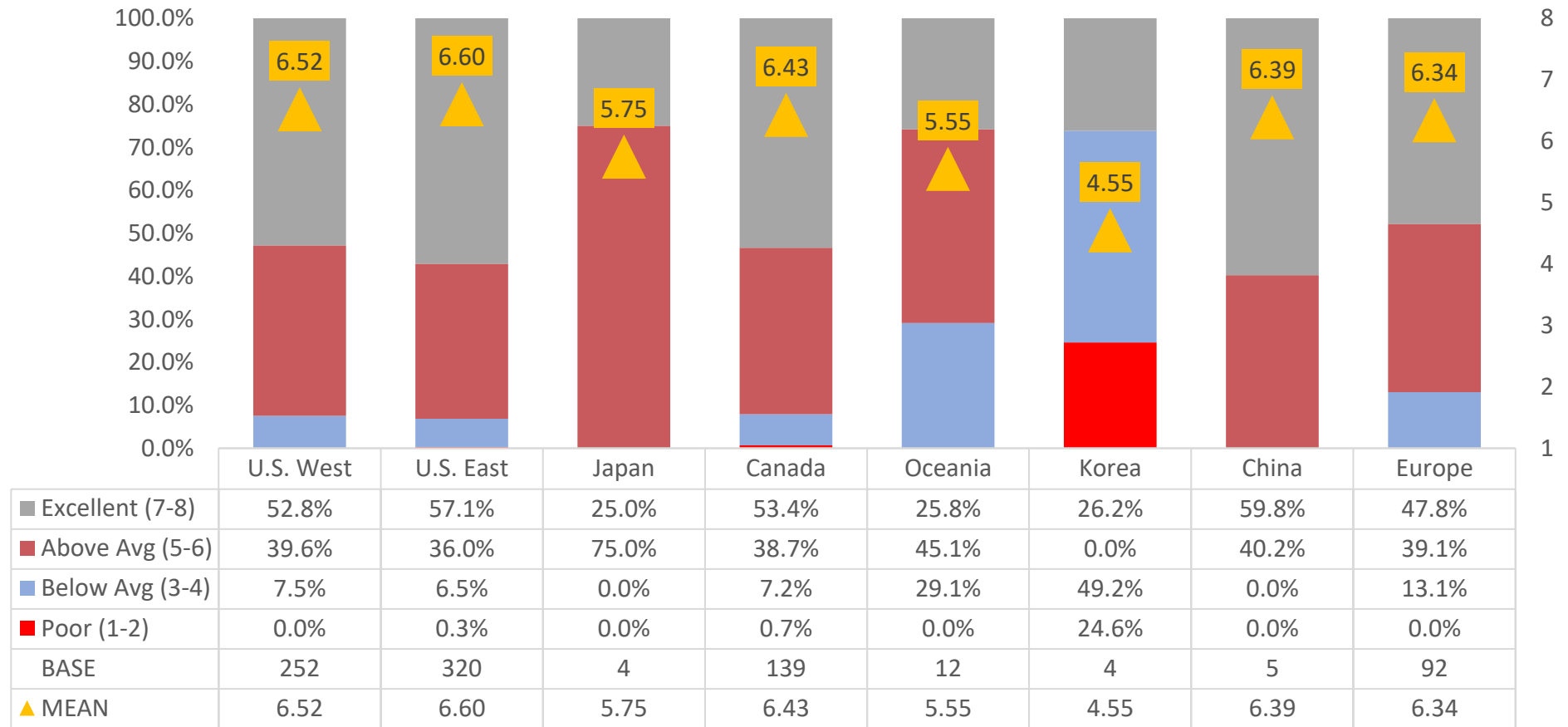
ENTERTAINMENT/ ATTRACTIONS - KAUA'I

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



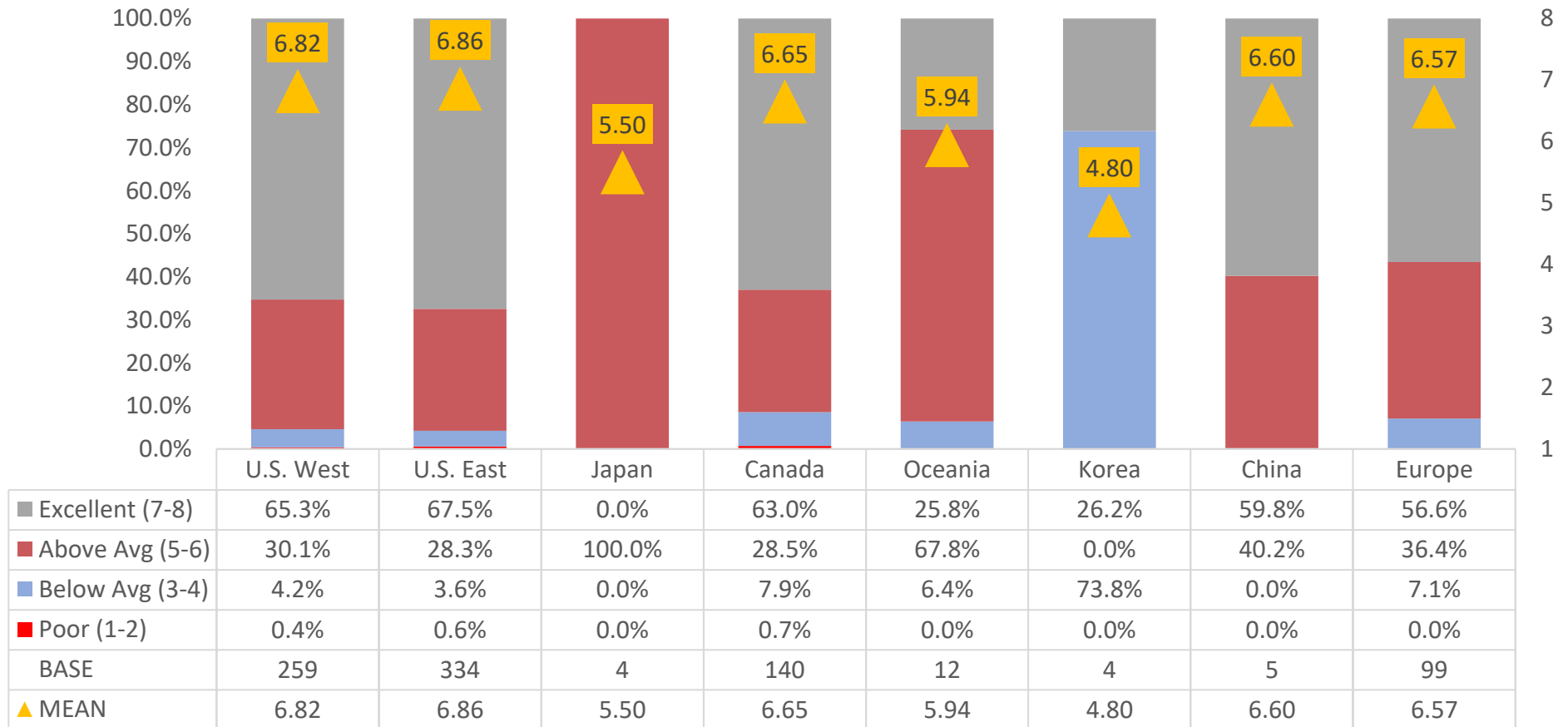
SHOPPING - KAUA'I

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



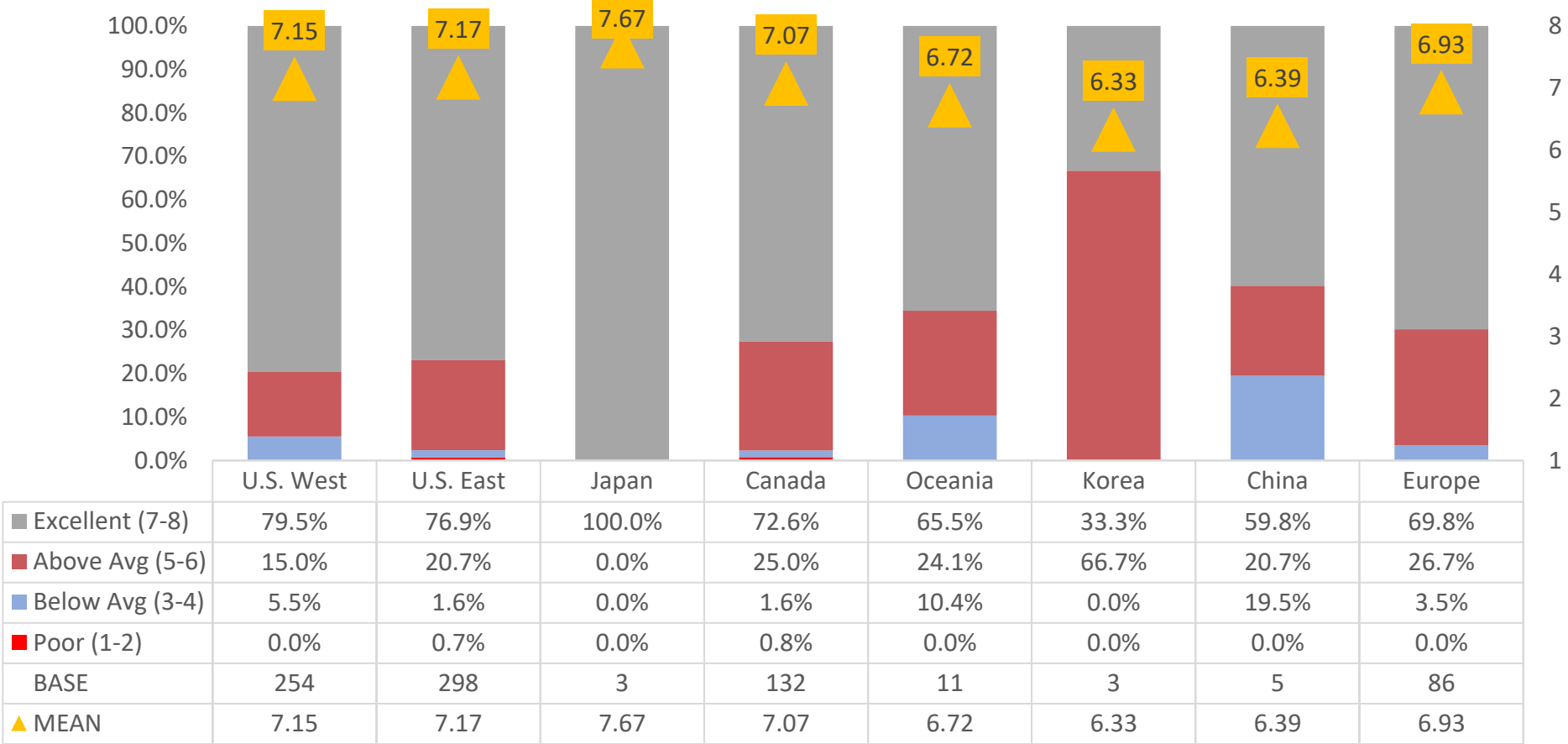
DINING/ FOOD & BEVERAGE - KAUA'I

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



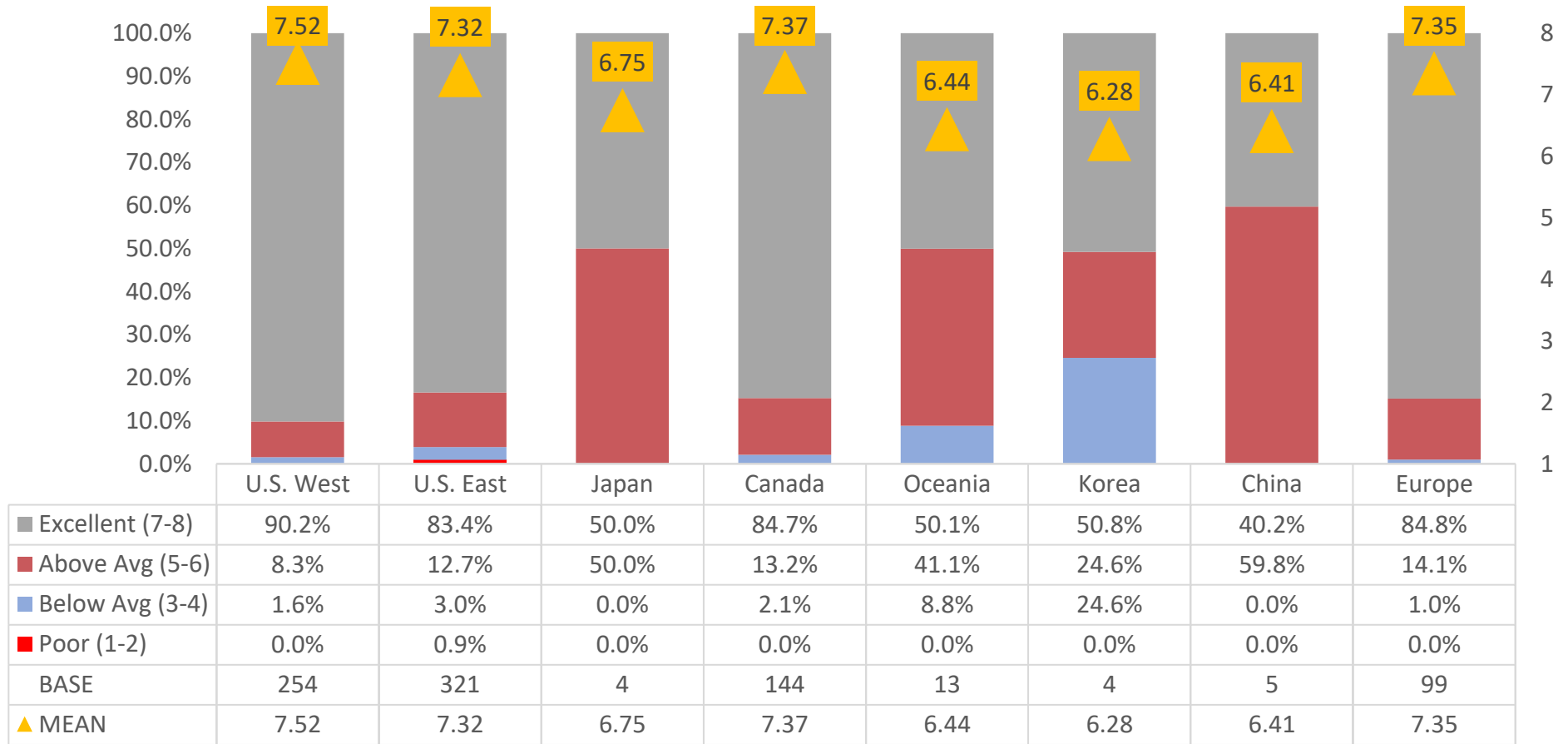
LODGING/ ACCOMMODATIONS - KAUA'I

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



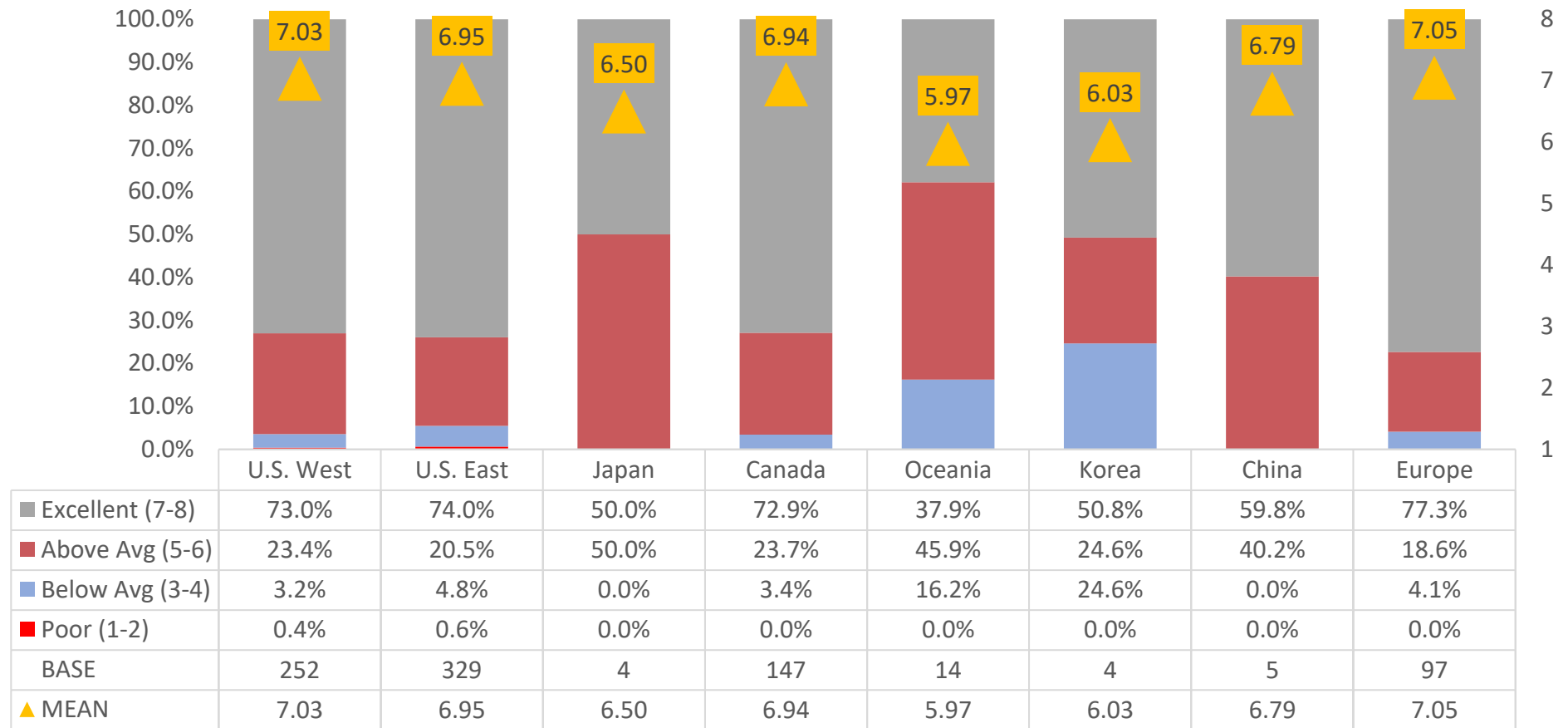
BEACHES - KAUA'I

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



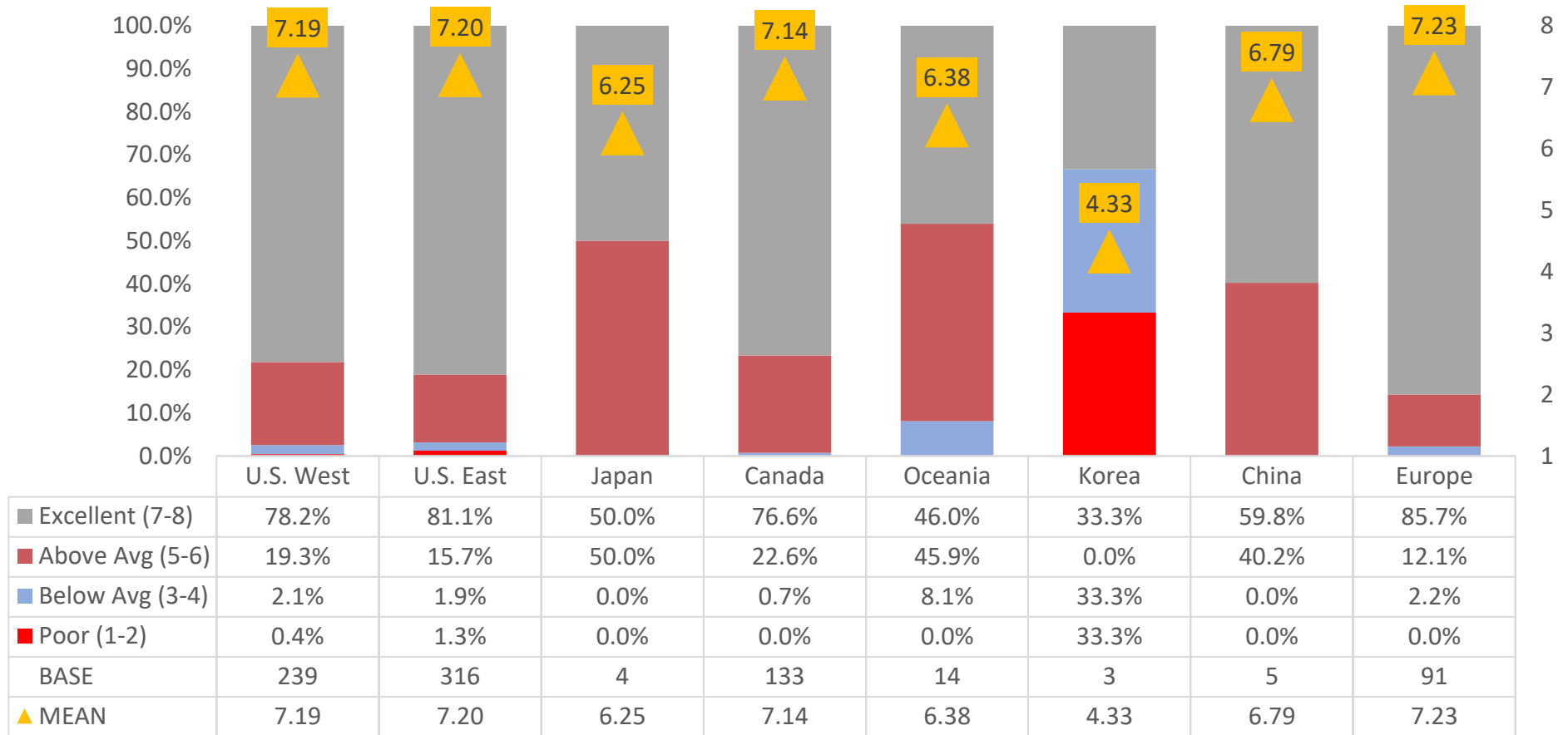
PUBLIC AREAS - KAUA'I

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



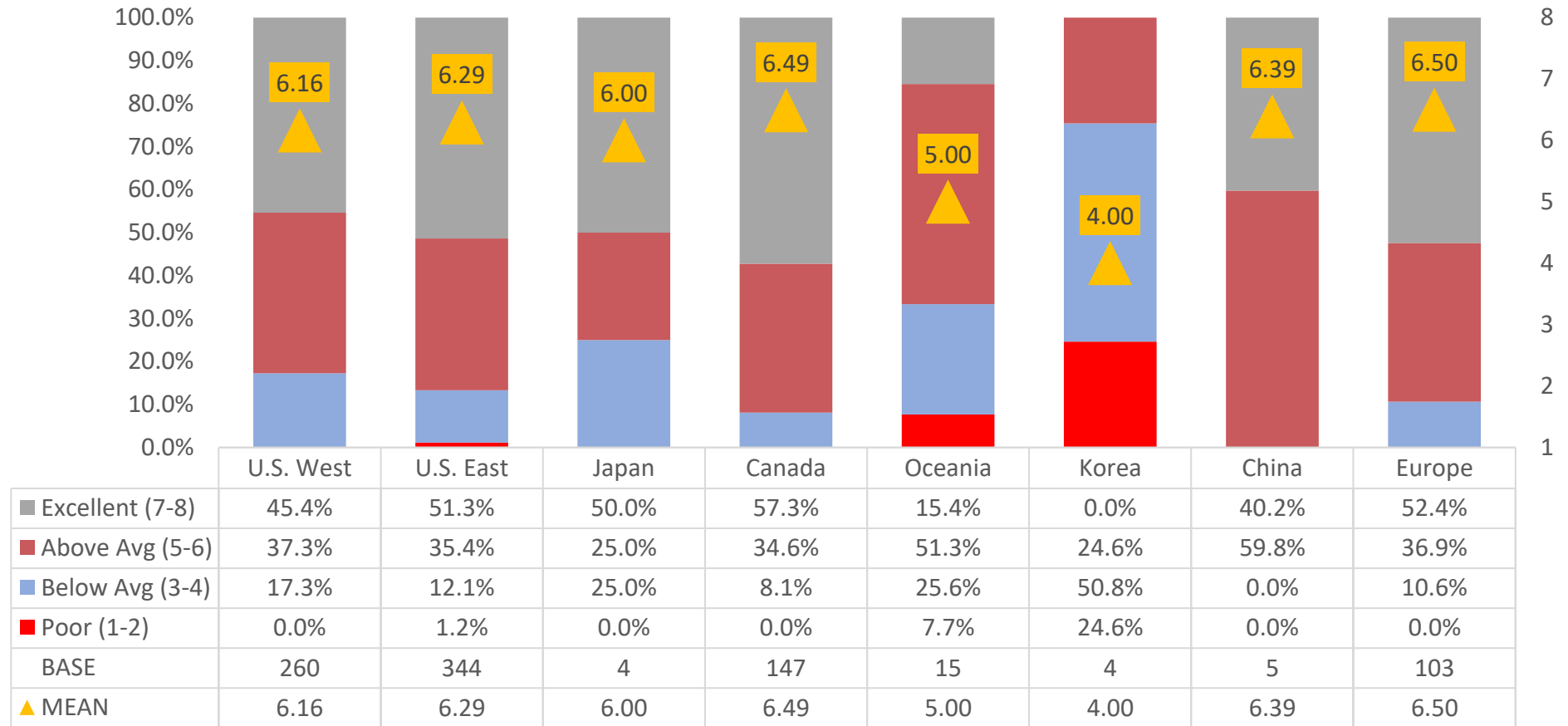
PARKS - KAUA'I

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



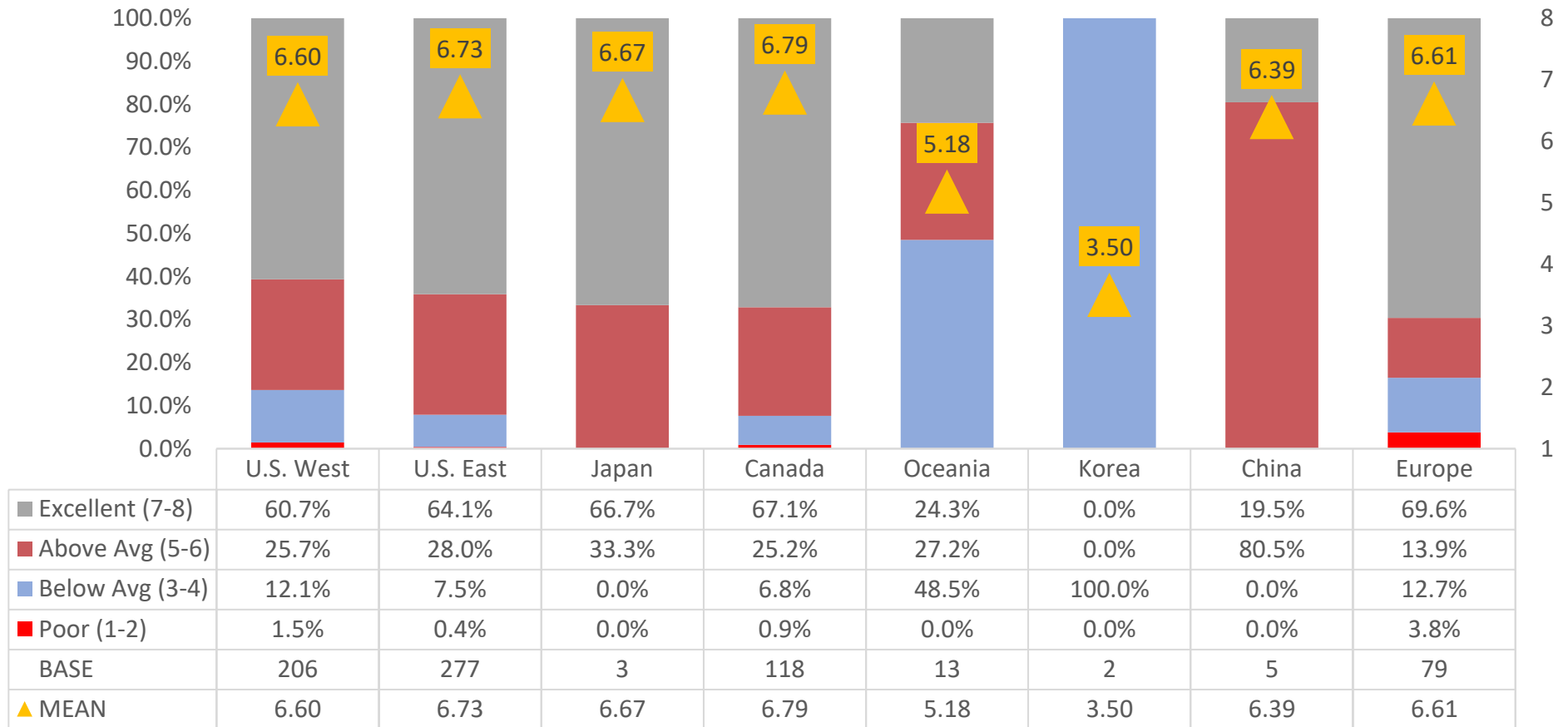
ROADS - KAUA'I

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



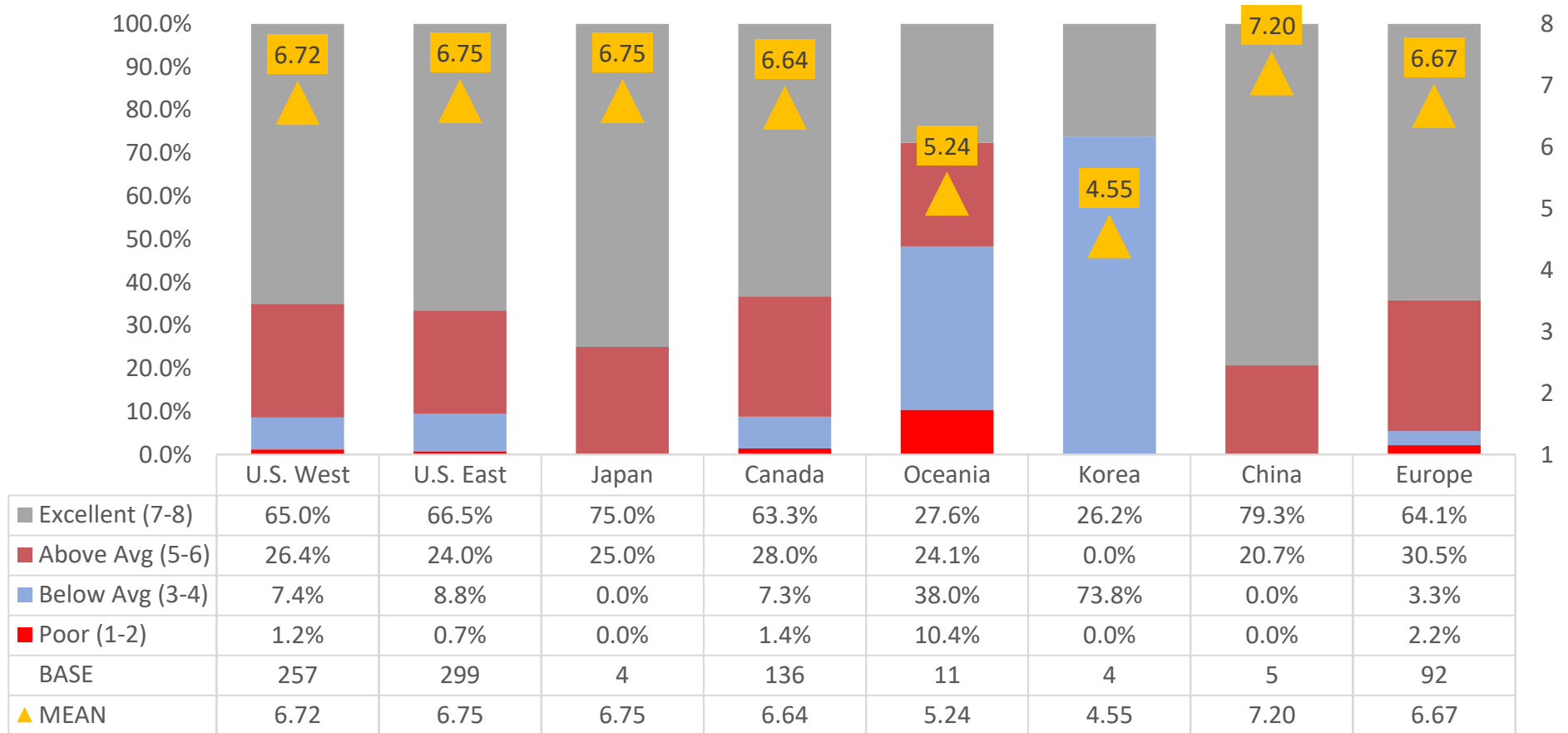
TRANSPORTATION ON ISLAND - KAUA'I

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



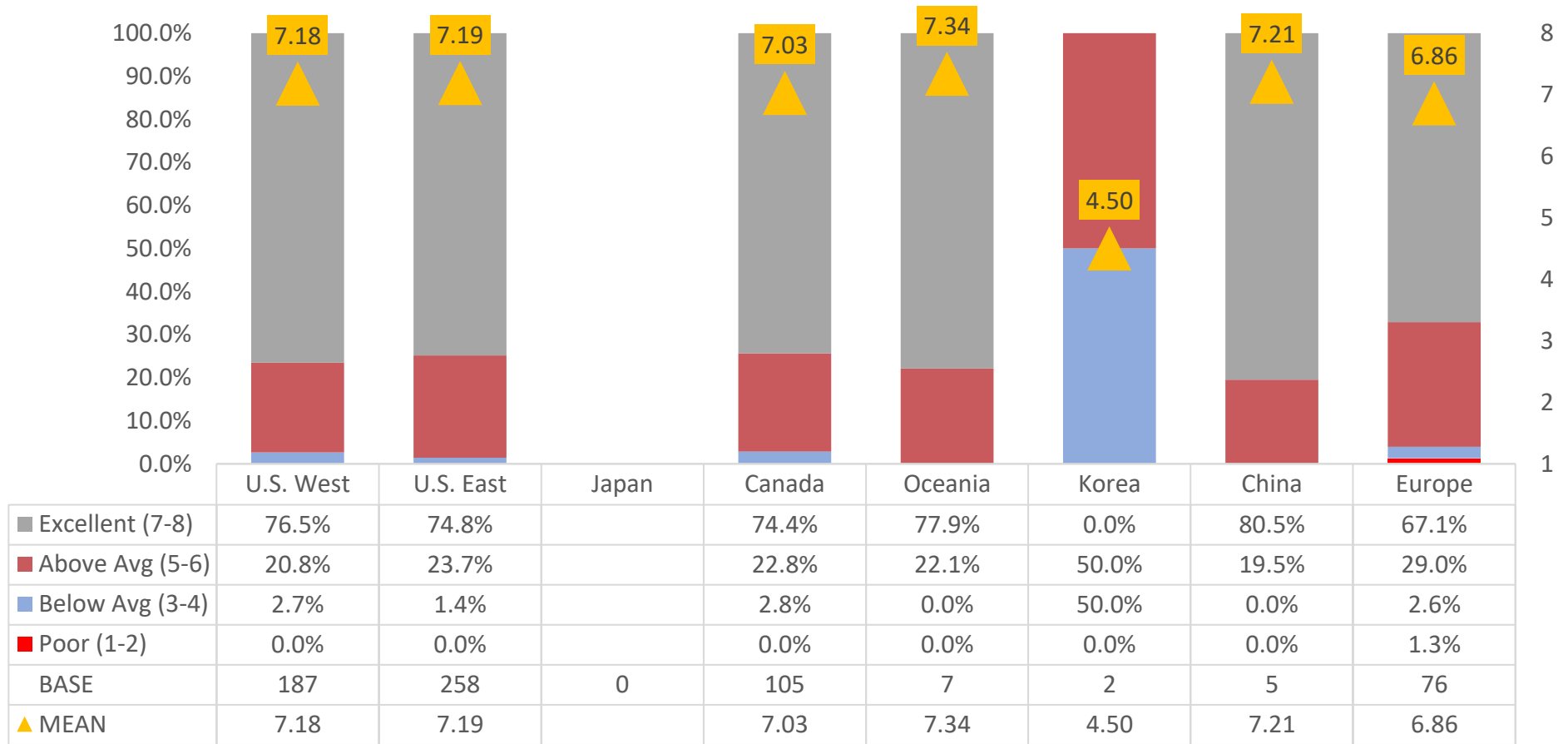
AIRPORT- KAUA'I

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



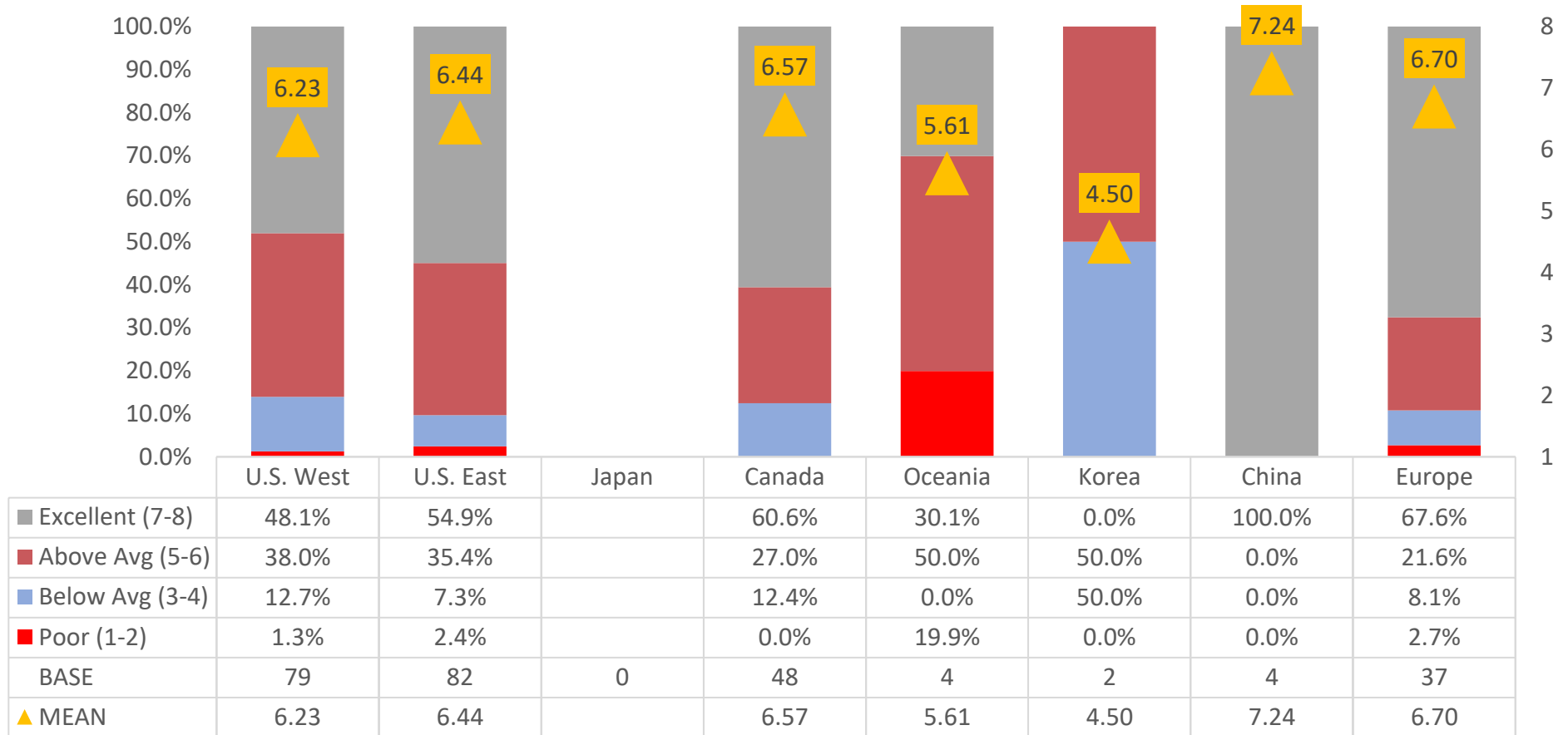
CULTURAL ACTIVITIES - KAUA'I

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



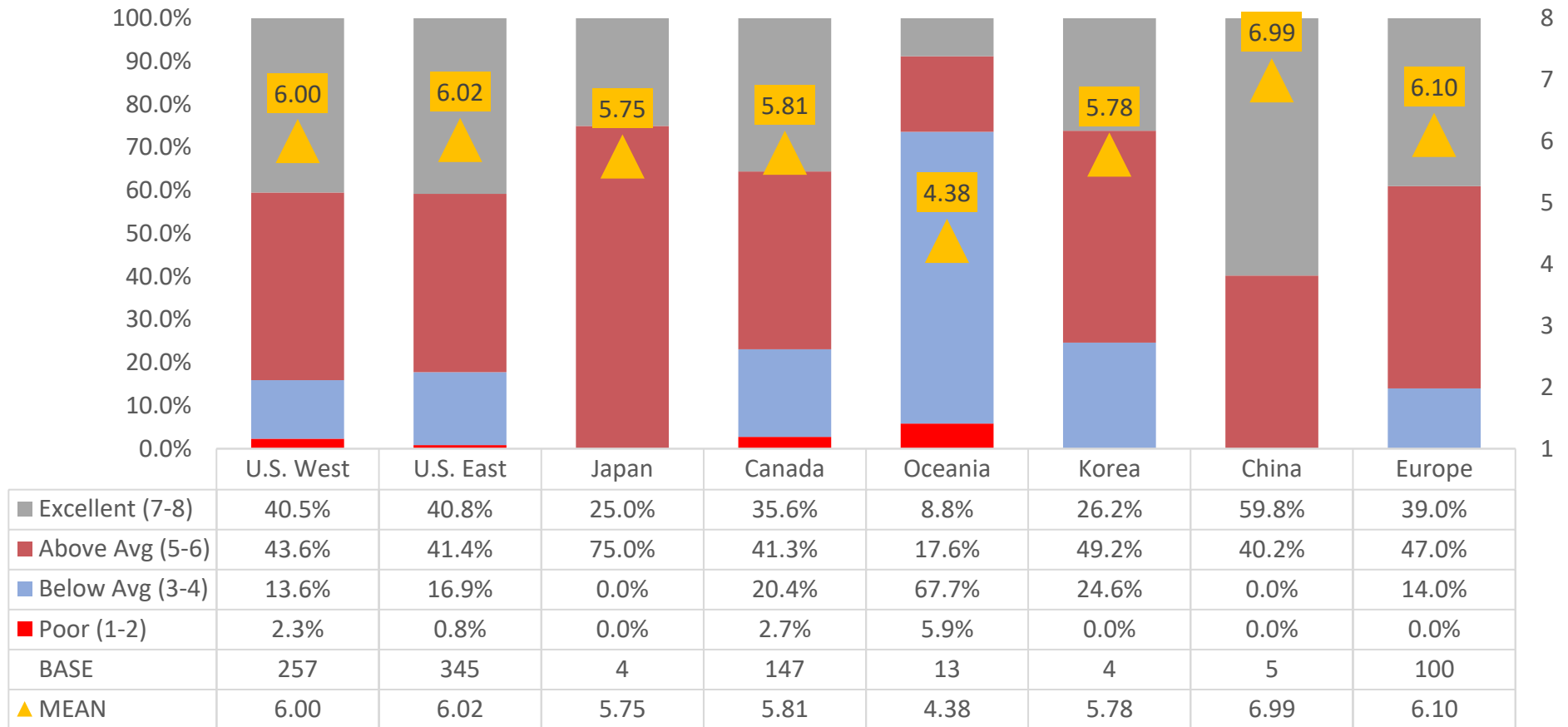
VOLUNTEER ACTIVITIES - KAUA'I

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



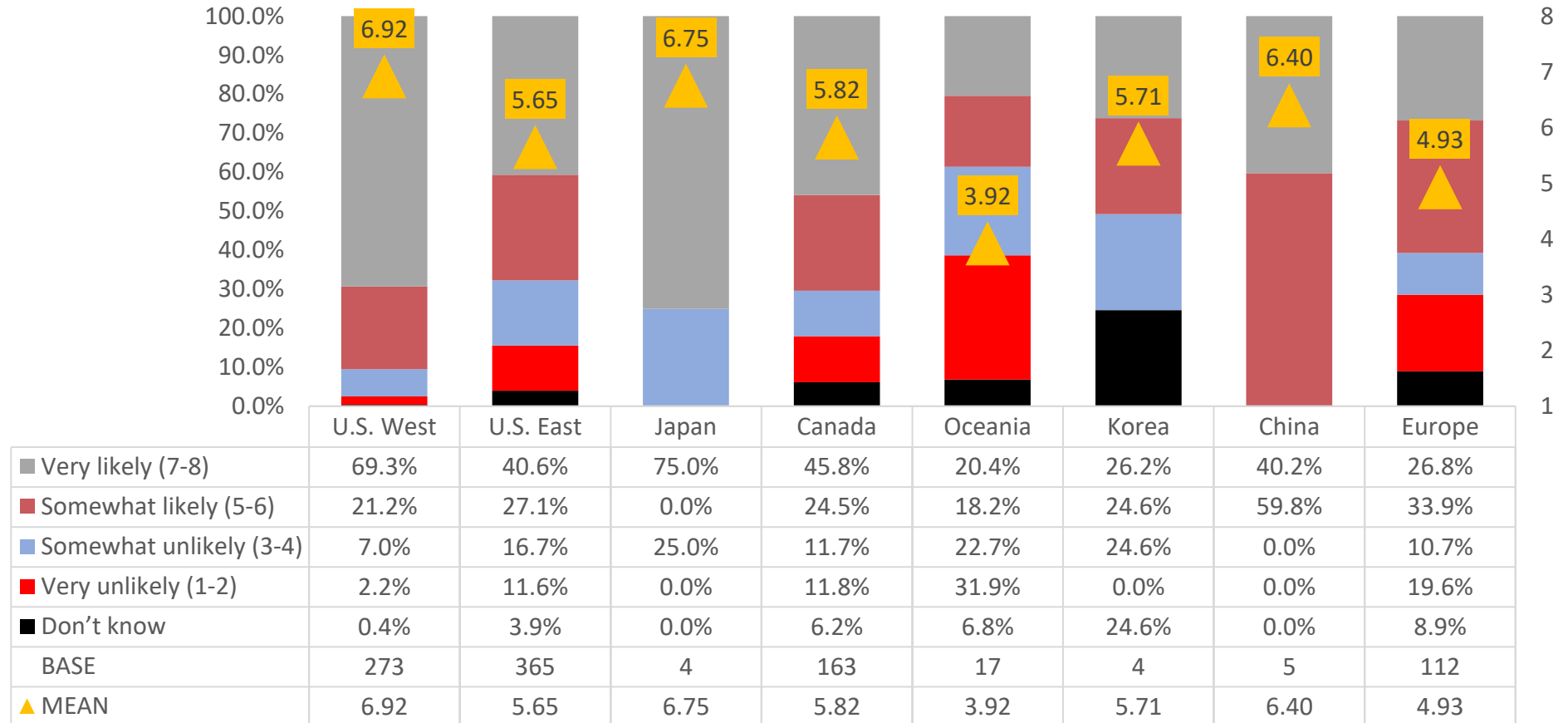
VALUE FOR THE MONEY- KAUA'I

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



LIKELIHOOD OF RETURN VISIT - KAUA'I

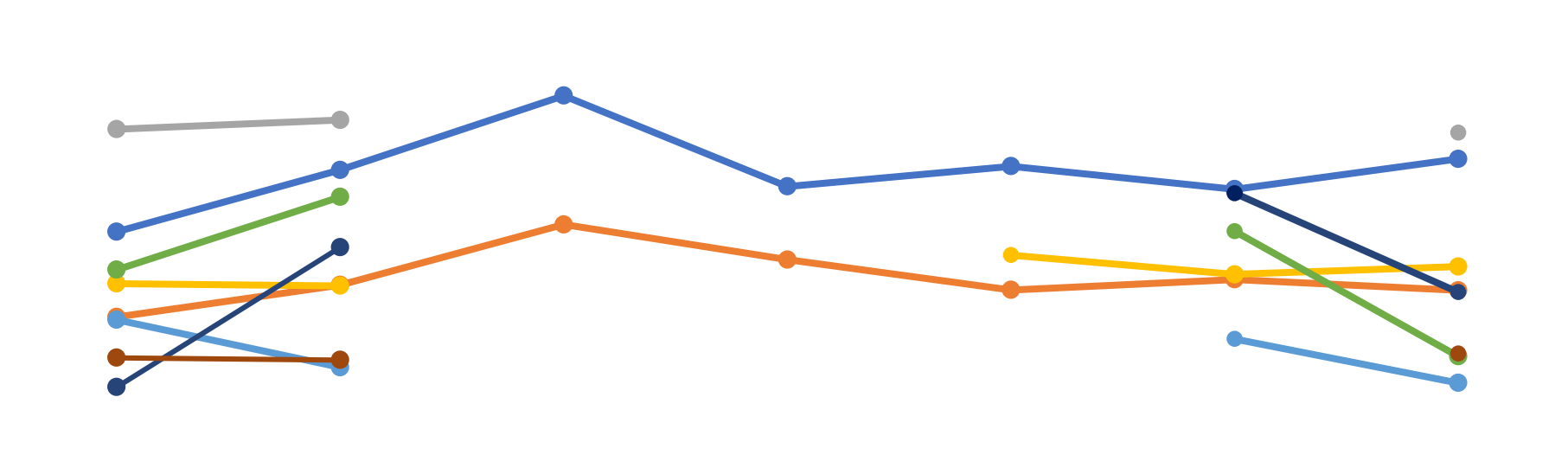
8-pt Rating Scale
8 = Very likely / 1 = Very unlikely



LIKELIHOOD OF RETURN VISIT - KAUA'I

TOP BOX - VERY LIKELY (7-8)

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

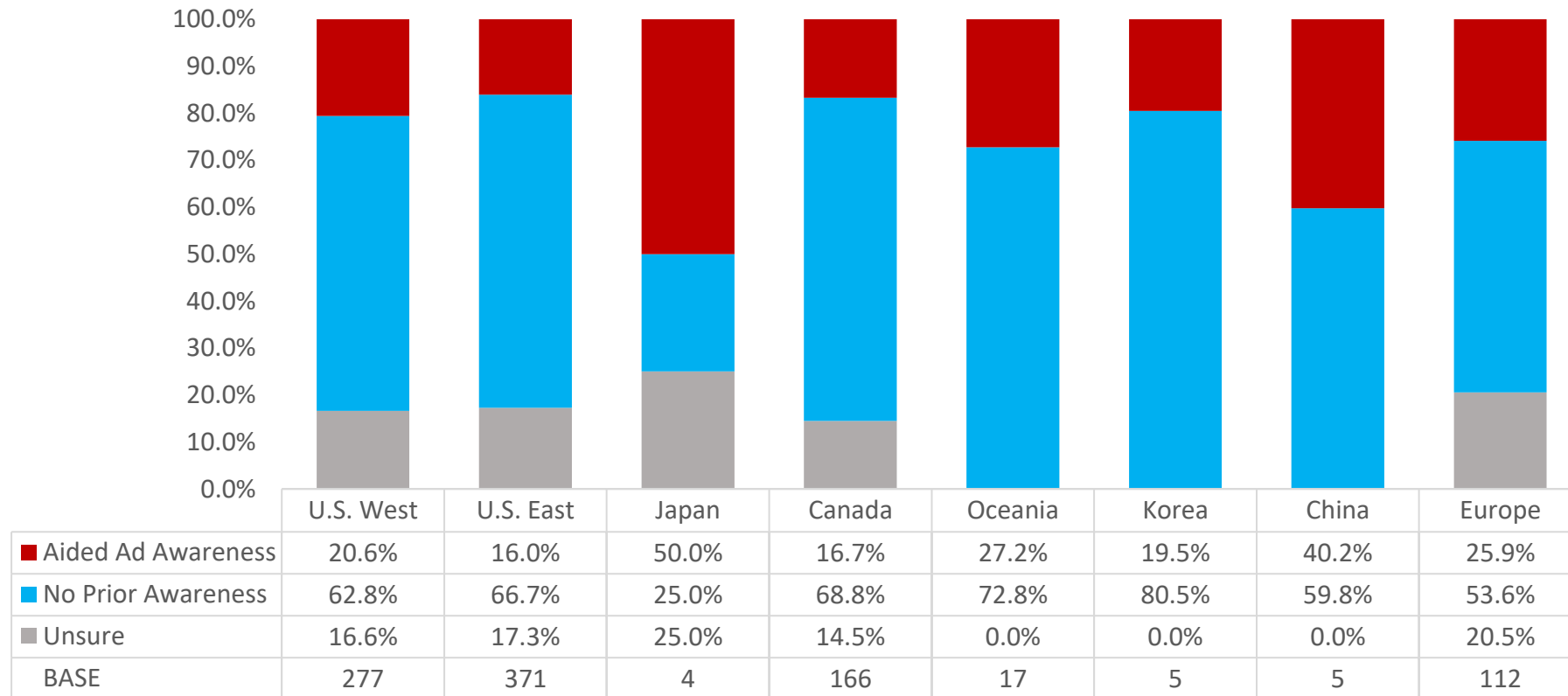


	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	53.4%	66.9%	83.1%	63.3%	67.7%	62.7%	69.3%
U.S. East	34.8%	41.8%	55.0%	47.3%	40.7%	43.0%	40.6%
Japan	75.8%	77.8%					75.0%
Canada	42.1%	41.6%			48.3%	44.1%	45.8%
Oceania	34.2%	23.8%				30.0%	20.4%
Korea	45.1%	61.0%				53.5%	26.2%
China	19.5%	50.0%				61.8%	40.2%
Europe	25.9%	25.4%					26.8%

P= Preliminary Data

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

AIDED ADVERTISING AWARENESS - KAUA'I

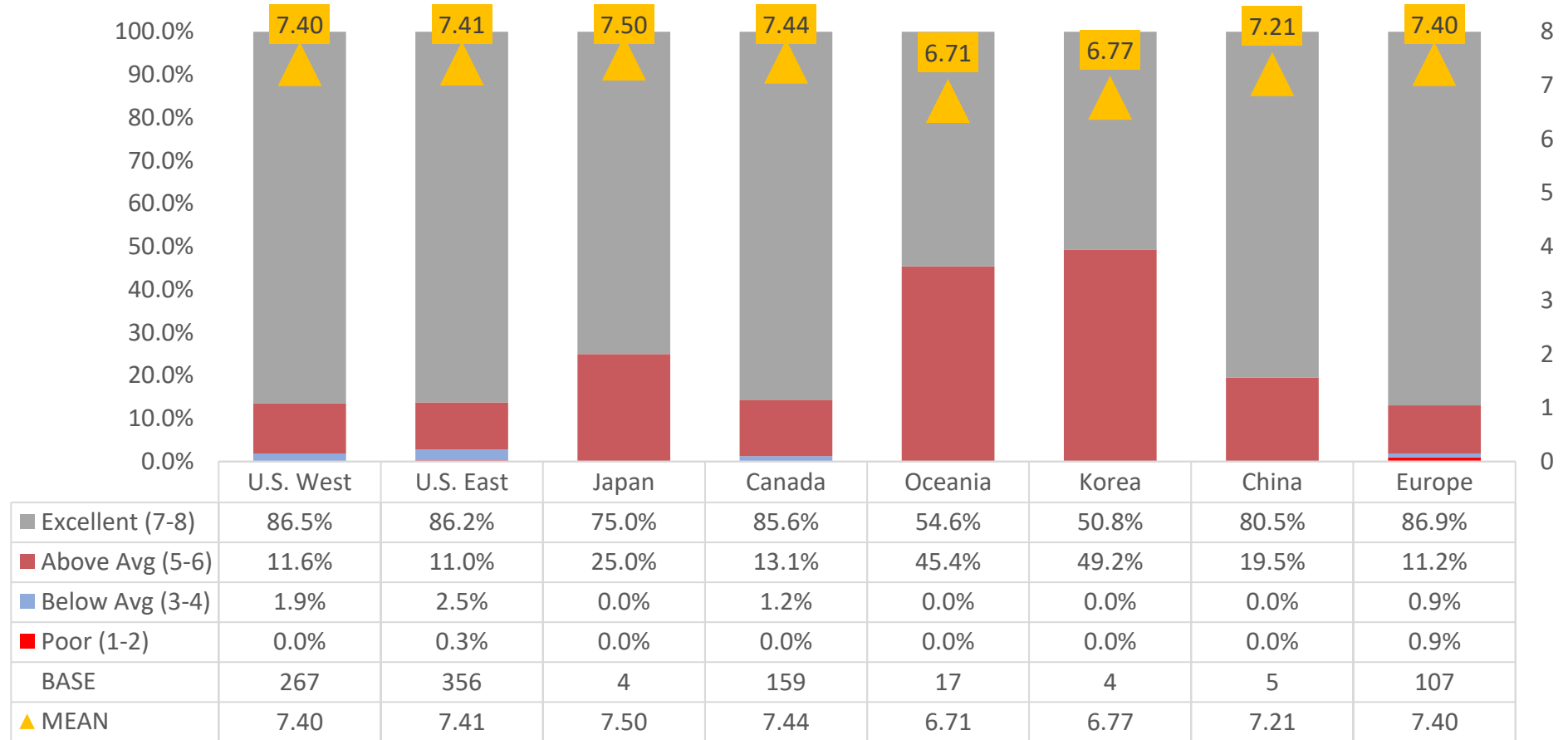


MOTIVATING FACTORS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	46.6%	46.6%	50.0%	43.9%	34.1%	80.5%	58.5%	57.2%
Outdoor or sporting activities and events	16.2%	18.4%	25.0%	15.5%	4.5%	41.5%	0.0%	14.3%
Social media posts and videos	9.4%	11.0%	0.0%	12.0%	15.9%	20.7%	19.5%	16.1%
Hawaiian cultural events	6.9%	5.7%	0.0%	4.2%	6.8%	0.0%	0.0%	4.5%
Television programs or movies filmed in Hawai'i	3.6%	7.3%	25.0%	4.2%	6.8%	19.5%	0.0%	17.8%
Hawaiian music	4.7%	2.8%	0.0%	3.0%	0.0%	0.0%	0.0%	2.7%
BASE	277	371	4	166	17	5	5	112

FRIENDLINESS OF KAUA‘I RESIDENTS

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



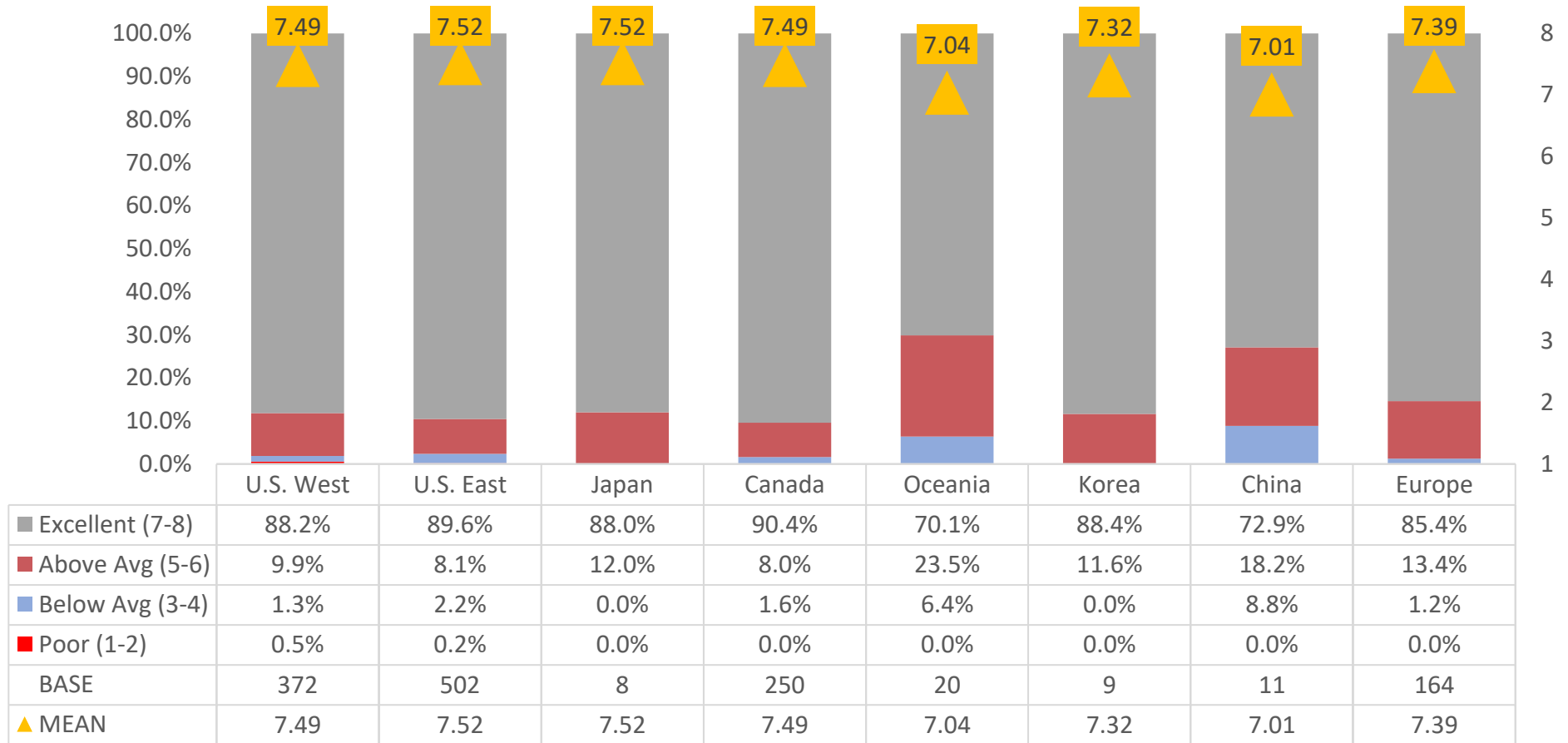
TOP TRIP INFLUENCERS - KAUA'I

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Been here before	48.8%	24.9%	25.0%	31.2%	4.7%	0.0%	0.0%	8.7%
Friend recommendation	25.2%	29.7%	50.0%	28.7%	19.1%	19.5%	0.0%	26.2%
Cruise line stop/part of tour	0.8%	13.7%	0.0%	10.1%	33.4%	19.5%	0.0%	13.6%
Visiting Family/ Friends	5.1%	4.3%	0.0%	4.0%	0.0%	0.0%	26.2%	4.8%
Social Media Post	3.1%	3.8%	0.0%	4.7%	7.2%	40.2%	24.6%	5.8%
Article/ Blog	2.0%	5.4%	0.0%	4.7%	4.7%	0.0%	49.2%	8.7%
Travel Agent	1.9%	2.9%	0.0%	2.0%	7.2%	0.0%	0.0%	15.6%
Location/ Never been, but went to other islands	2.3%	1.8%	25.0%	0.7%	4.7%	0.0%	0.0%	1.9%
Own a timeshare	2.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nature/ Beauty/ Scenery	1.2%	2.6%	0.0%	0.7%	0.0%	20.7%	0.0%	1.0%

Section 7 – Maui

SATISFACTION - MAUI

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

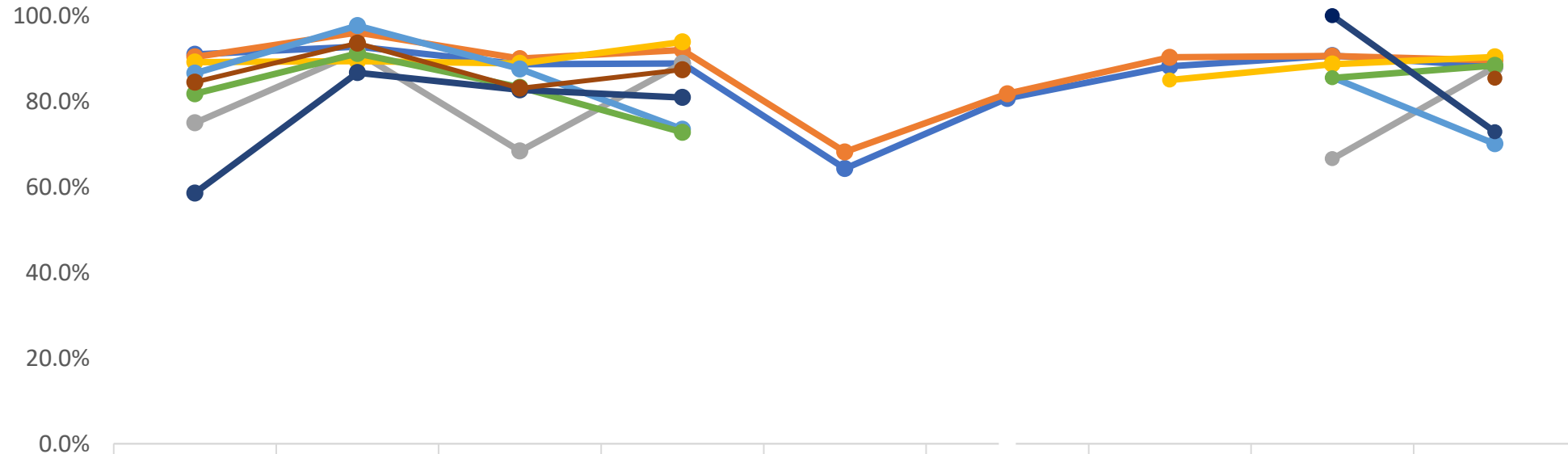


SATISFACTION - MAUI

- **Gender:** Female respondents from **U.S. West** gave higher satisfaction scores than male respondents.
- **Education:** Visitors from **U.S. East** 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)



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	91.0%	92.8%	88.7%	88.9%	64.3%	80.7%	88.2%	90.7%	88.2%
U.S. East	90.4%	96.1%	90.0%	92.0%	68.2%	81.8%	90.3%	90.6%	89.6%
Japan	75.0%	91.5%	68.4%	88.9%				66.6%	88.0%
Canada	89.2%	89.4%	88.9%	93.9%			85.0%	88.7%	90.4%
Oceania	86.6%	97.7%	87.6%	73.5%				85.6%	70.1%
Korea	81.8%	91.2%	83.3%	72.8%				85.5%	88.4%
China	58.6%	86.7%	82.7%	80.9%				100.0%	72.9%
Europe	84.5%	93.6%	83.1%	87.4%					85.4%

P= Preliminary Data

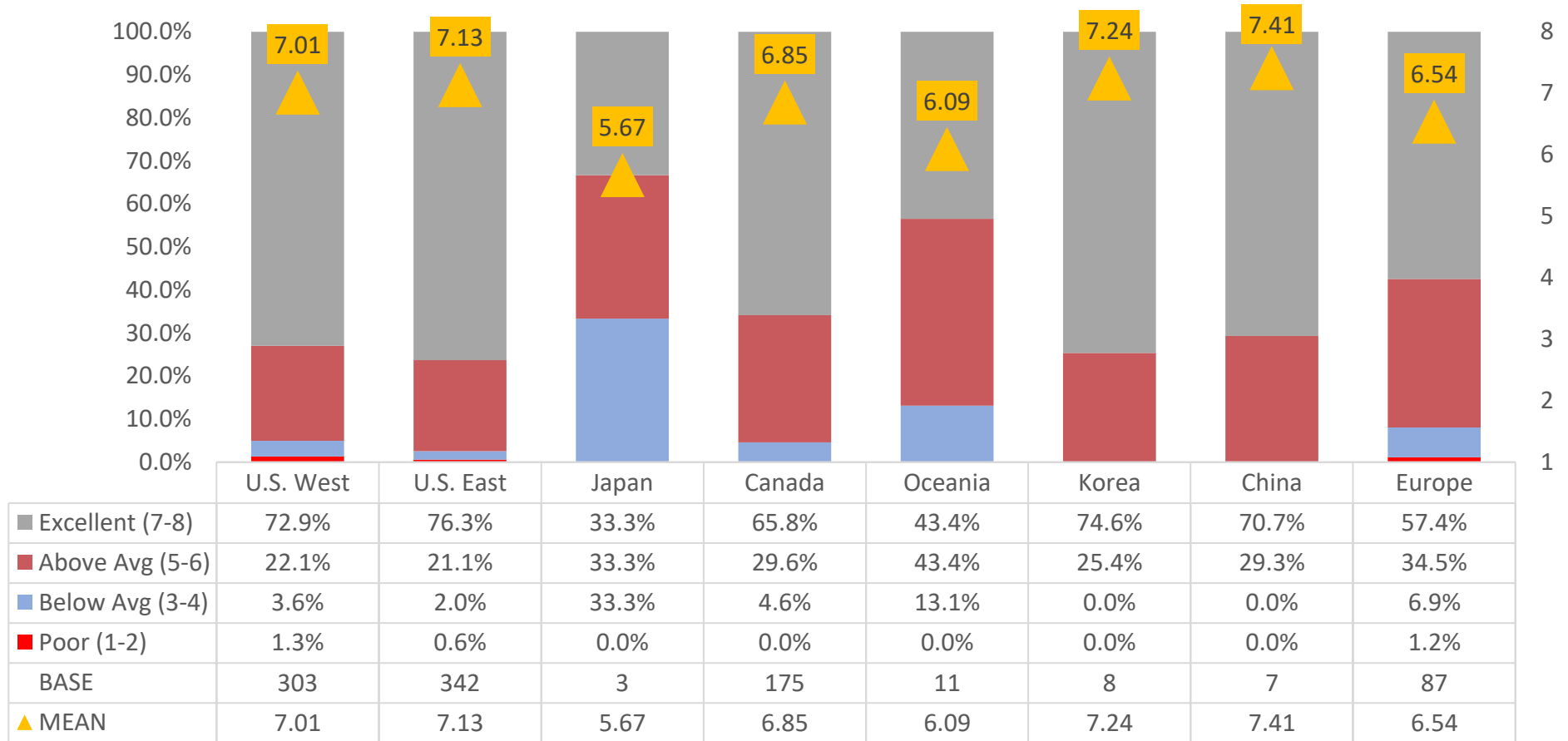
Q. How would you rate your most recent trip to the state of Hawai'i? How would you rate your experience on___?

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.



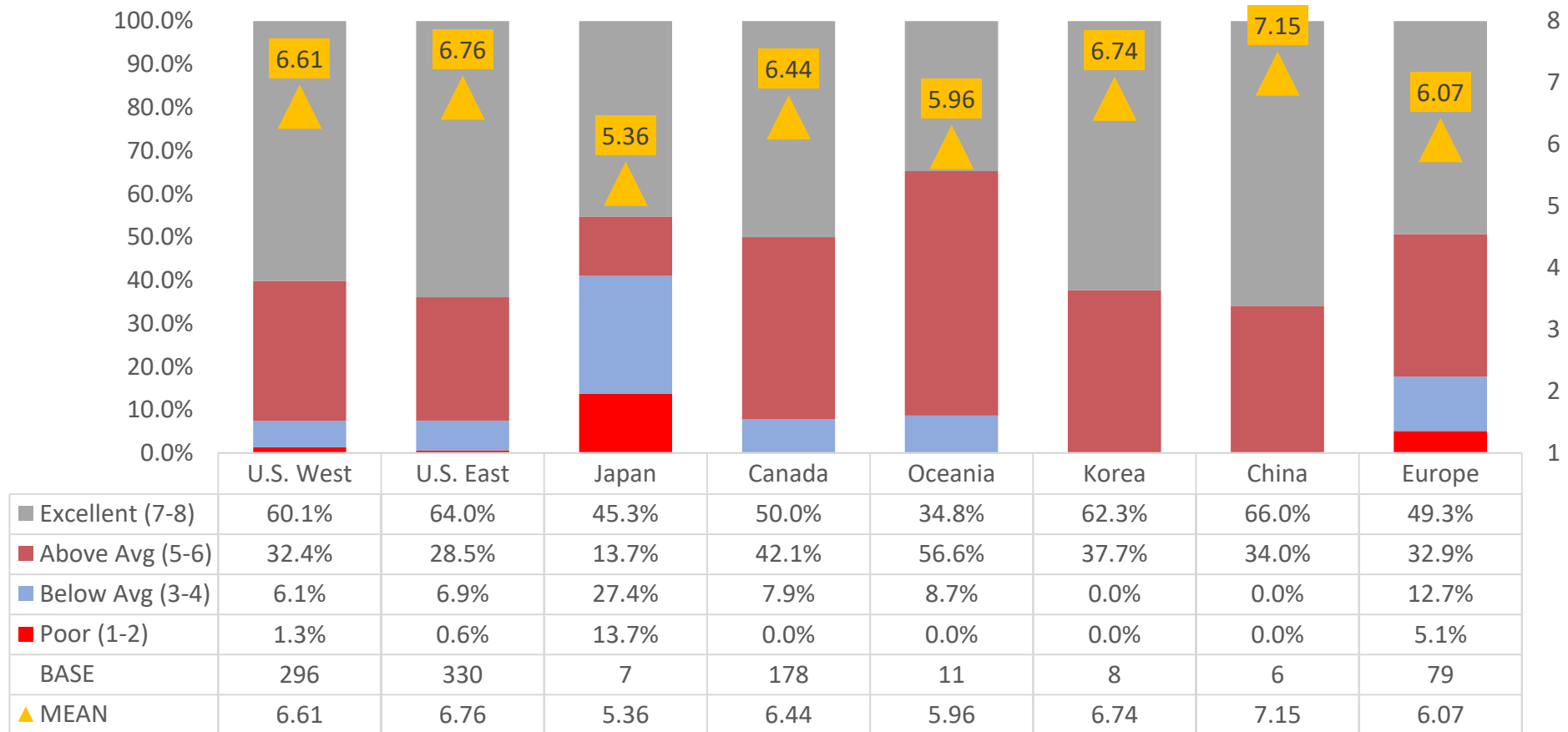
ENTERTAINMENT/ ATTRACTIONS - MAUI

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



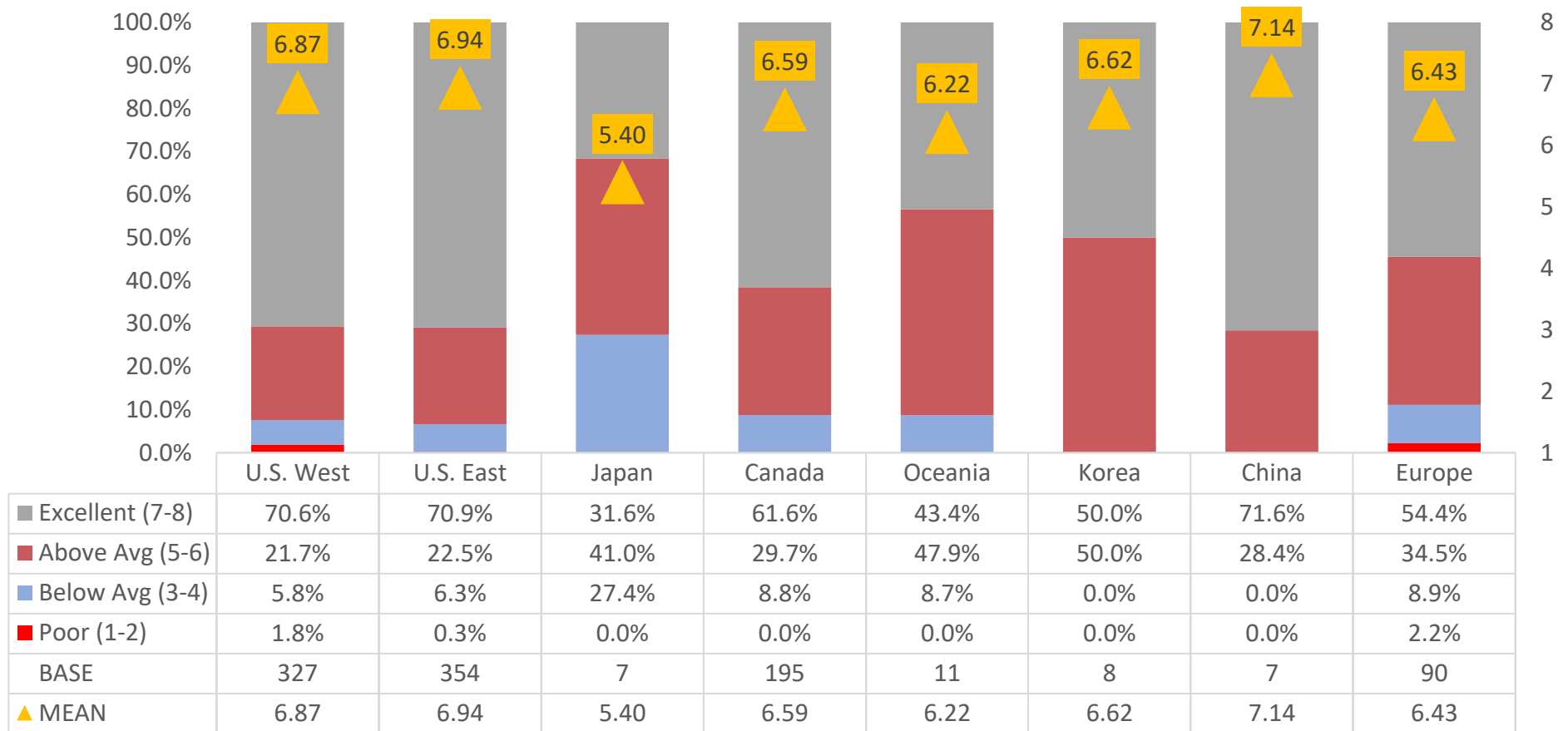
SHOPPING - MAUI

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



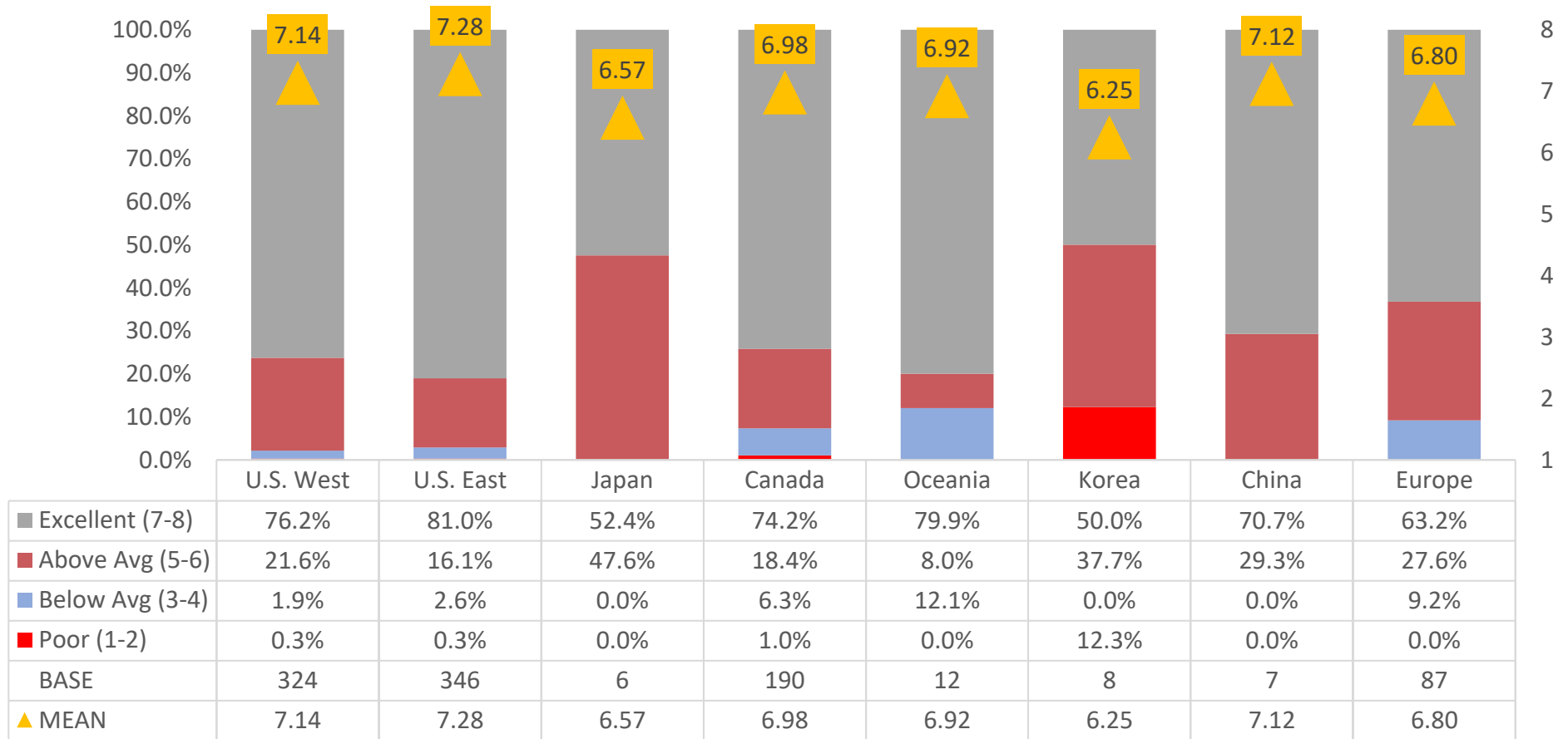
DINING/ FOOD & BEVERAGE - MAUI

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



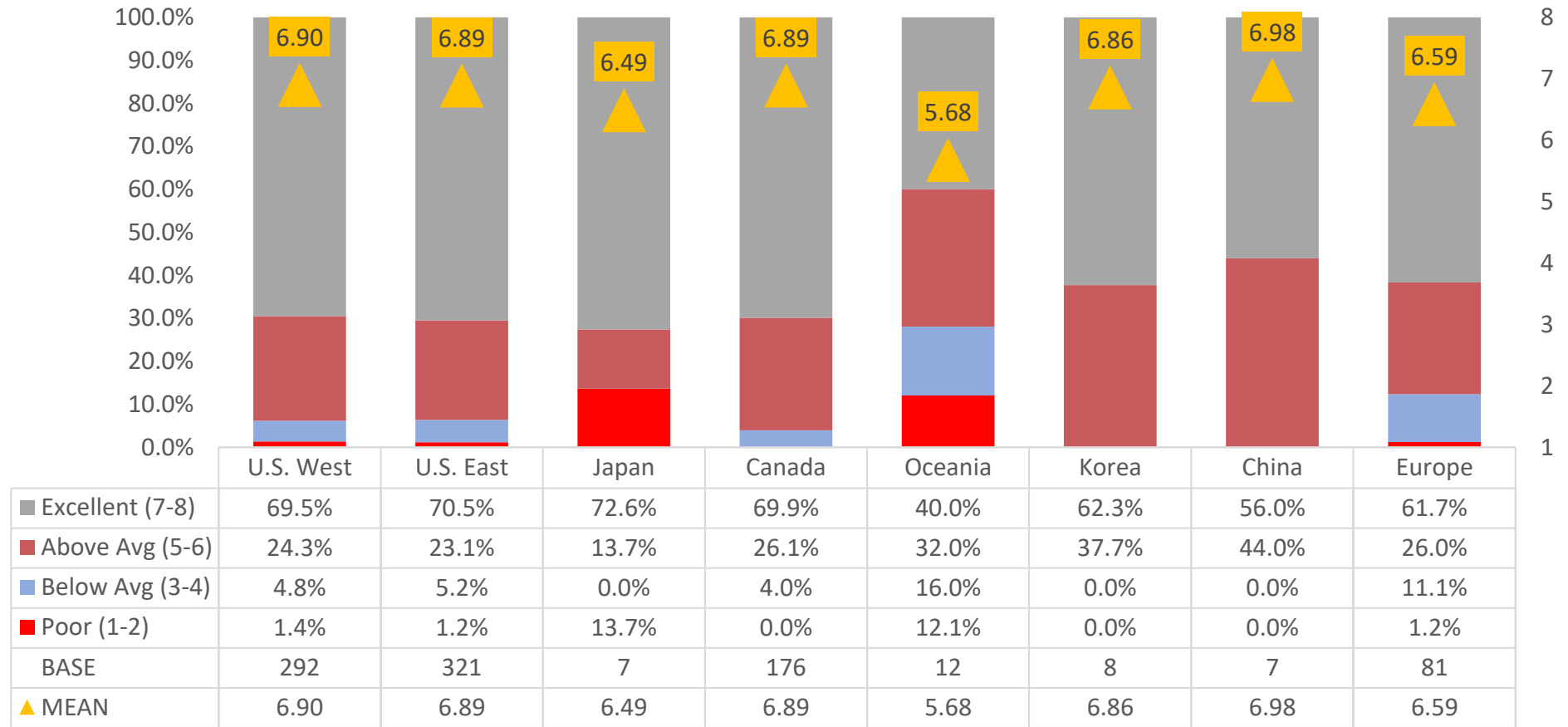
LODGING/ ACCOMMODATIONS - MAUI

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



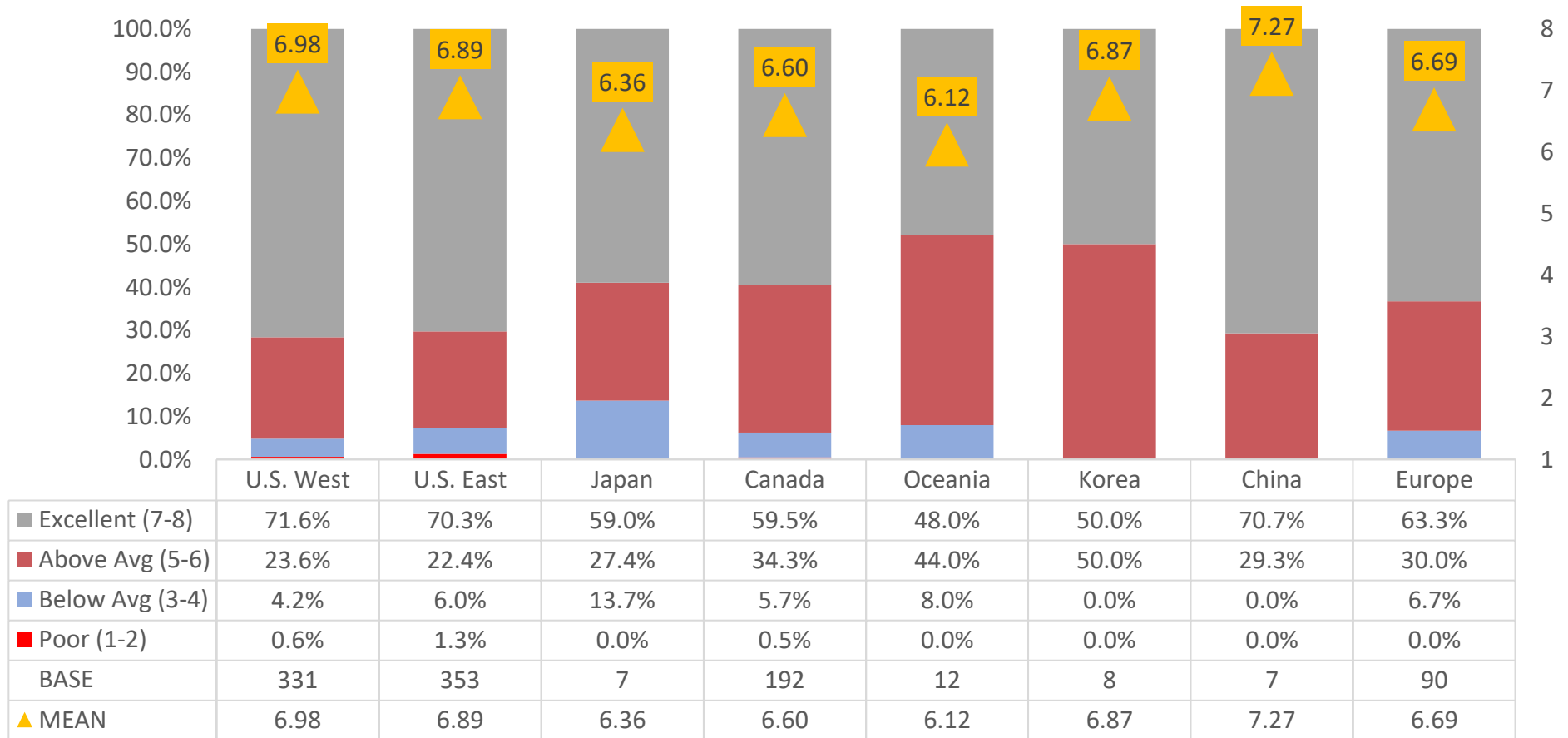
TRANSPORTATION ON ISLAND - MAUI

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



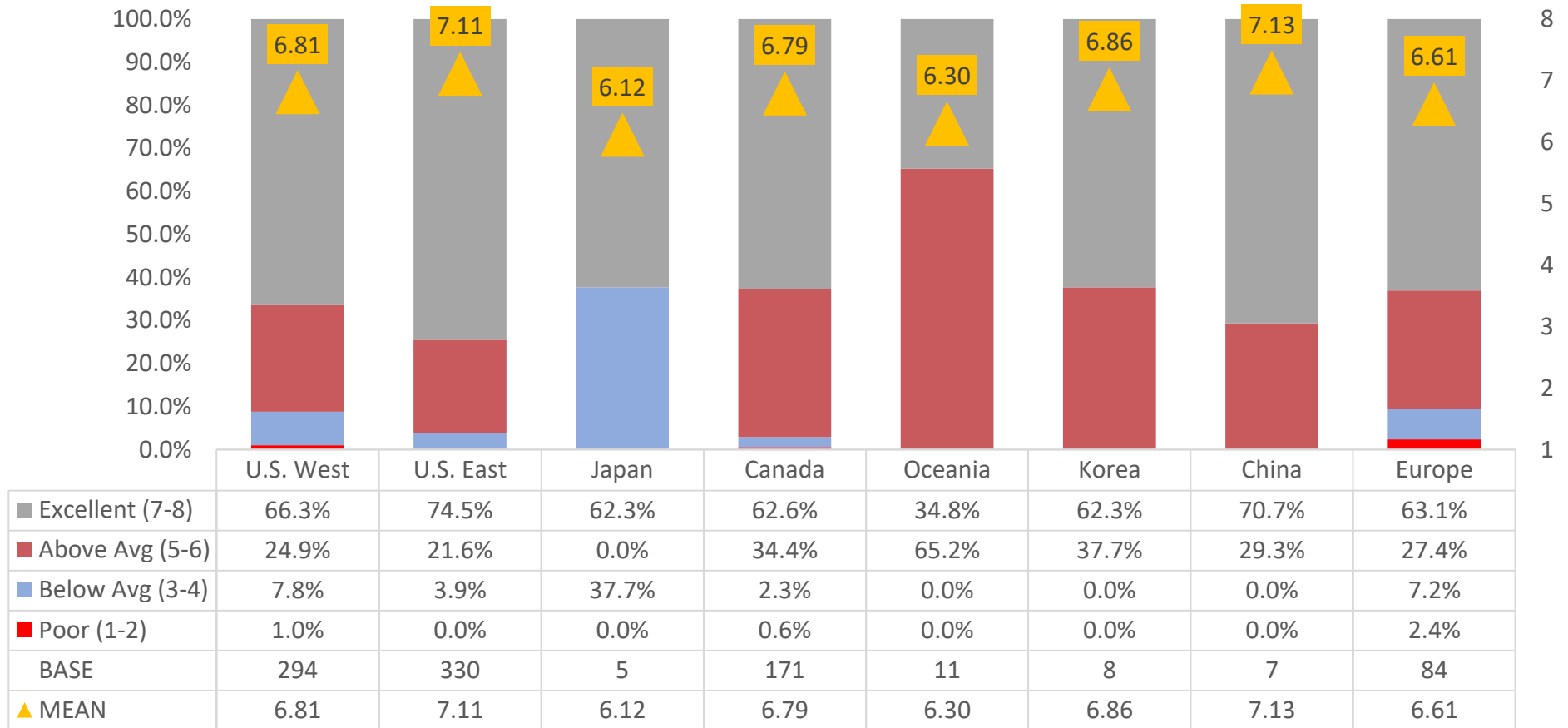
AIRPORT - MAUI

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



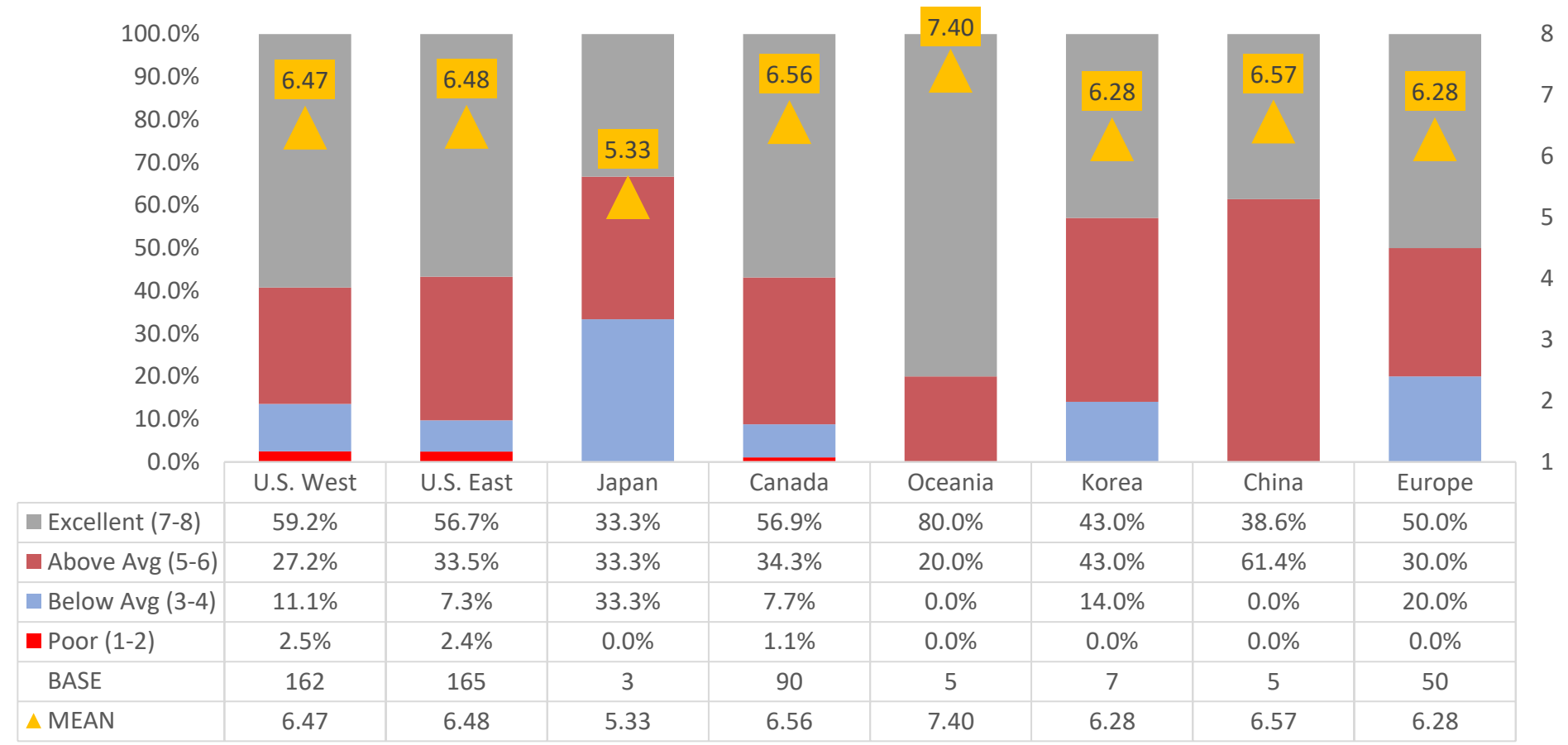
CULTURAL EXPERIENCES - MAUI

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



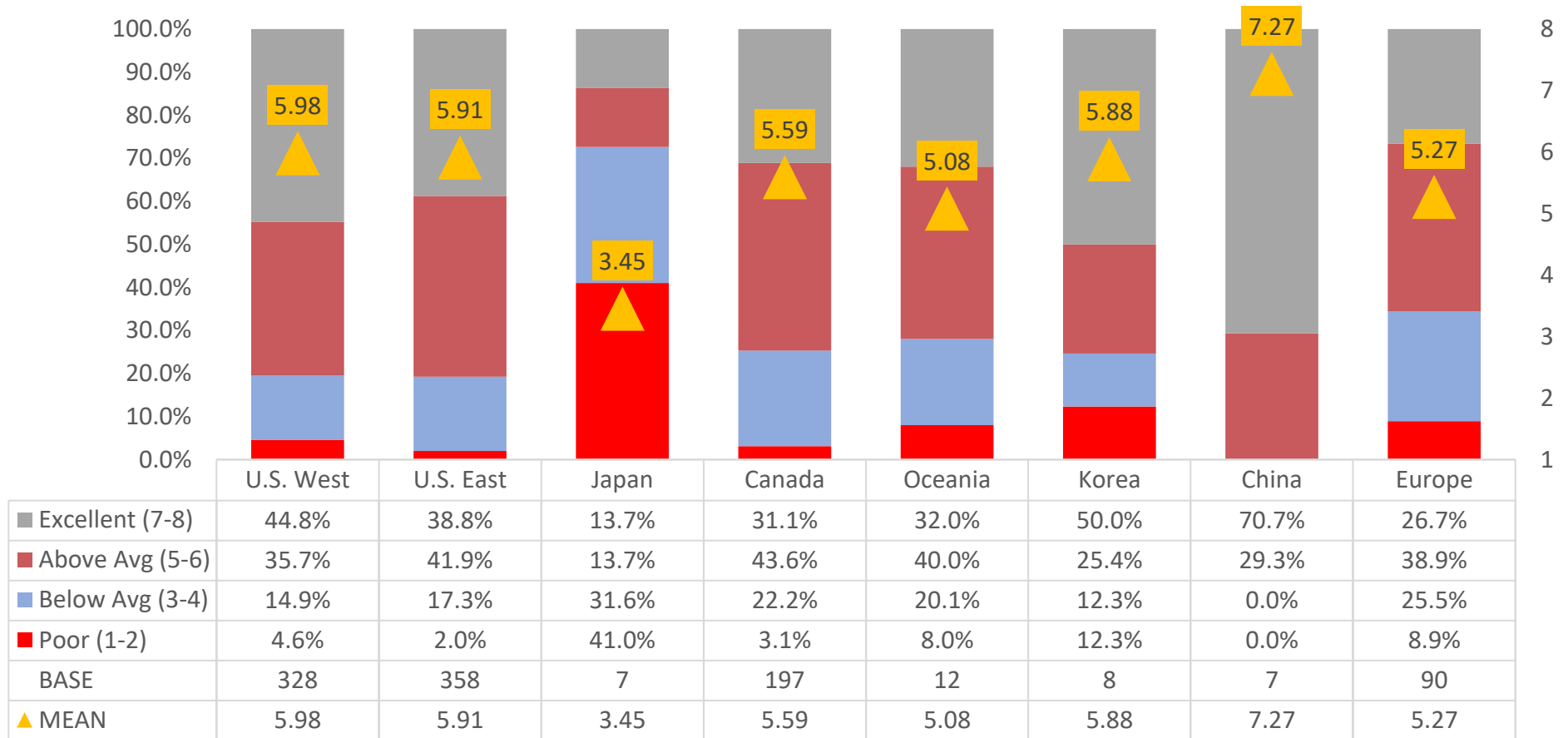
VOLUNTEER EXPERIENCES - MAUI

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



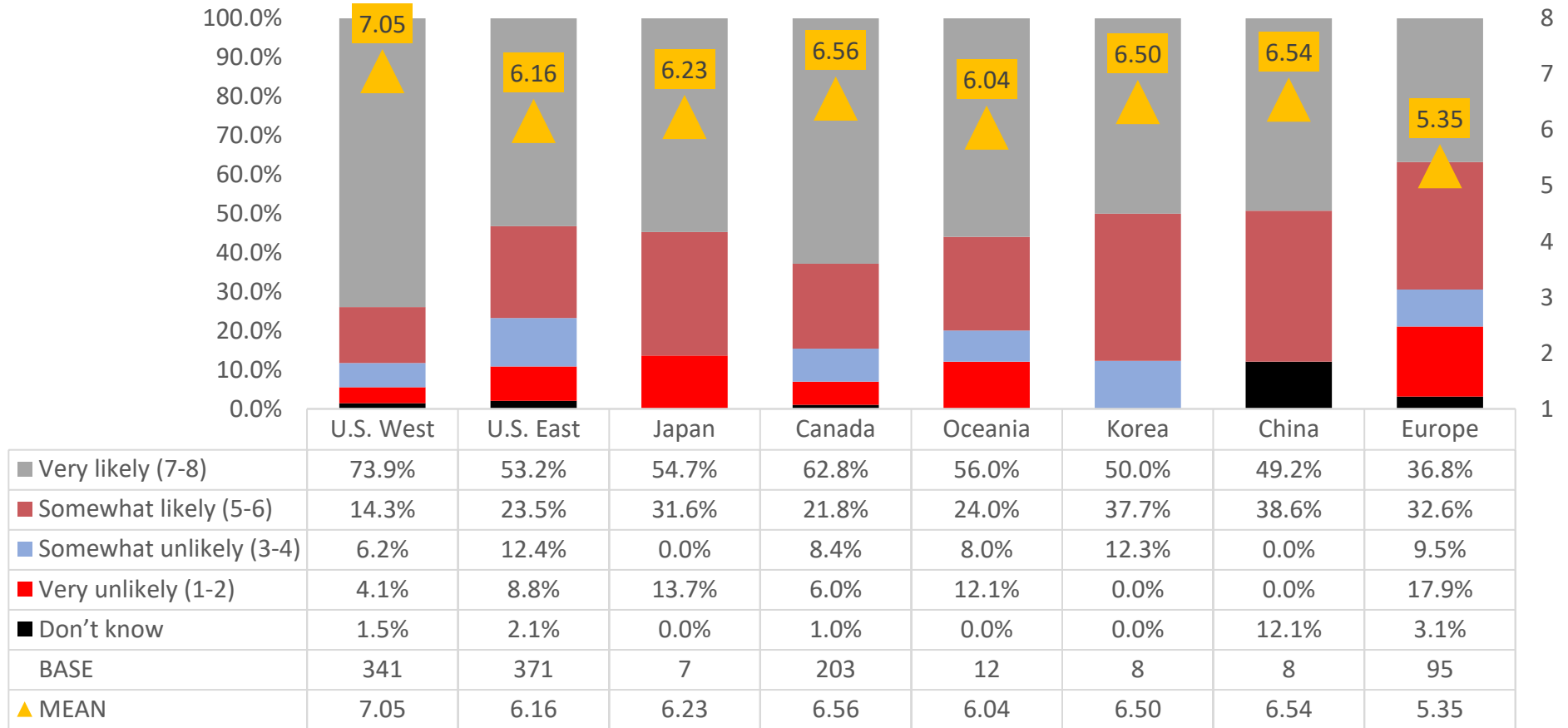
VALUE FOR THE MONEY - MAUI

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



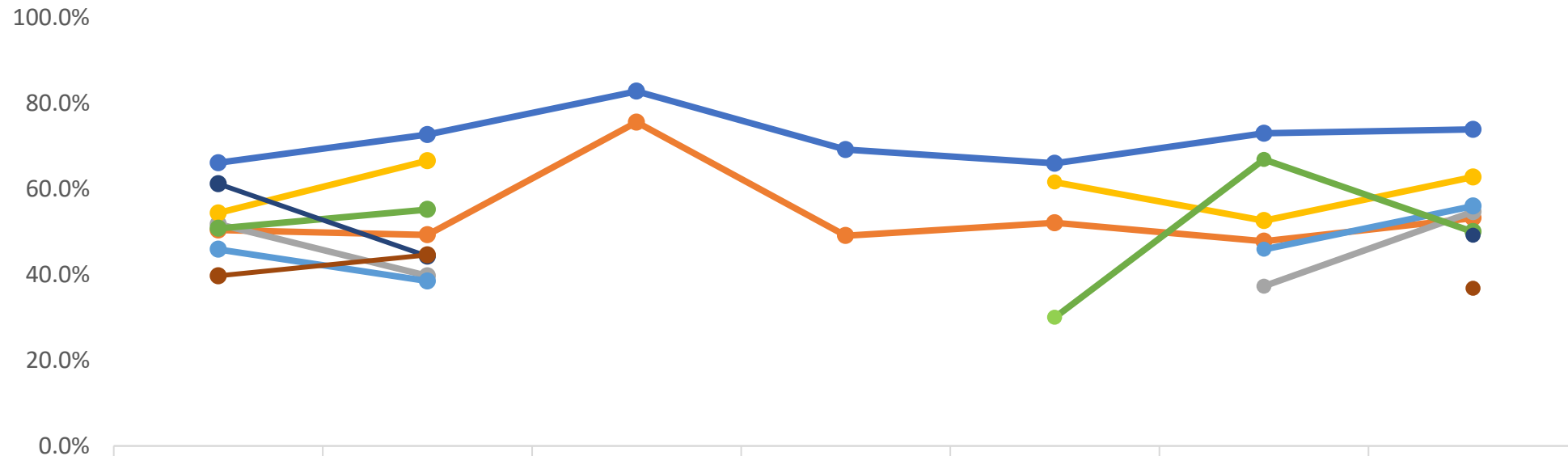
LIKELIHOOD OF RETURN VISIT - MAUI

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



LIKELIHOOD OF RETURN VISIT - MAUI

TOP BOX - VERY LIKELY (7-8)

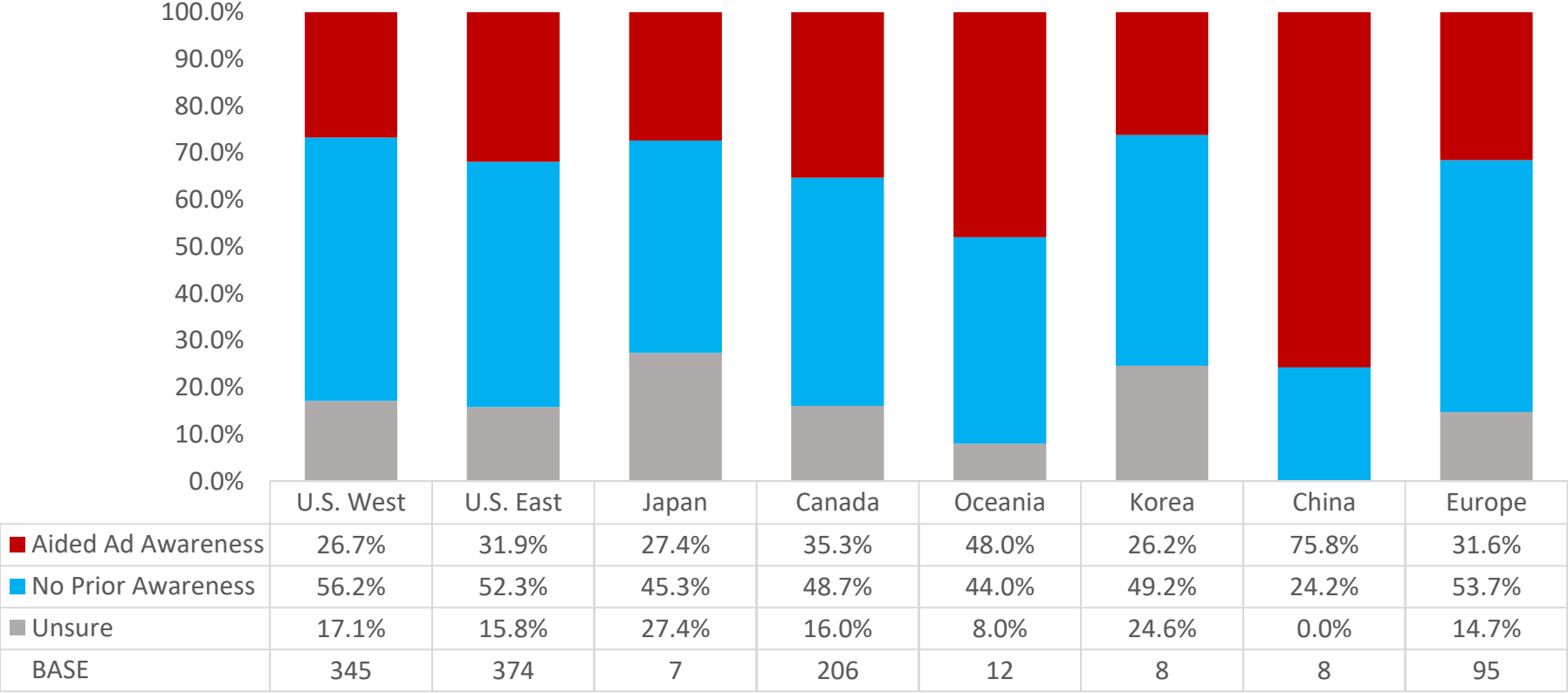


	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	66.1%	72.7%	82.8%	69.2%	66.0%	73.0%	73.9%
U.S. East	50.4%	49.3%	75.6%	49.1%	52.1%	47.8%	53.2%
Japan	51.8%	39.7%				37.3%	54.7%
Canada	54.4%	66.6%			61.6%	52.6%	62.8%
Oceania	45.9%	38.5%				45.9%	56.0%
Korea	50.8%	55.2%			30.0%	66.9%	50.0%
China	61.2%	44.3%					49.2%
Europe	39.7%	44.6%					36.8%

P= Preliminary Data

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

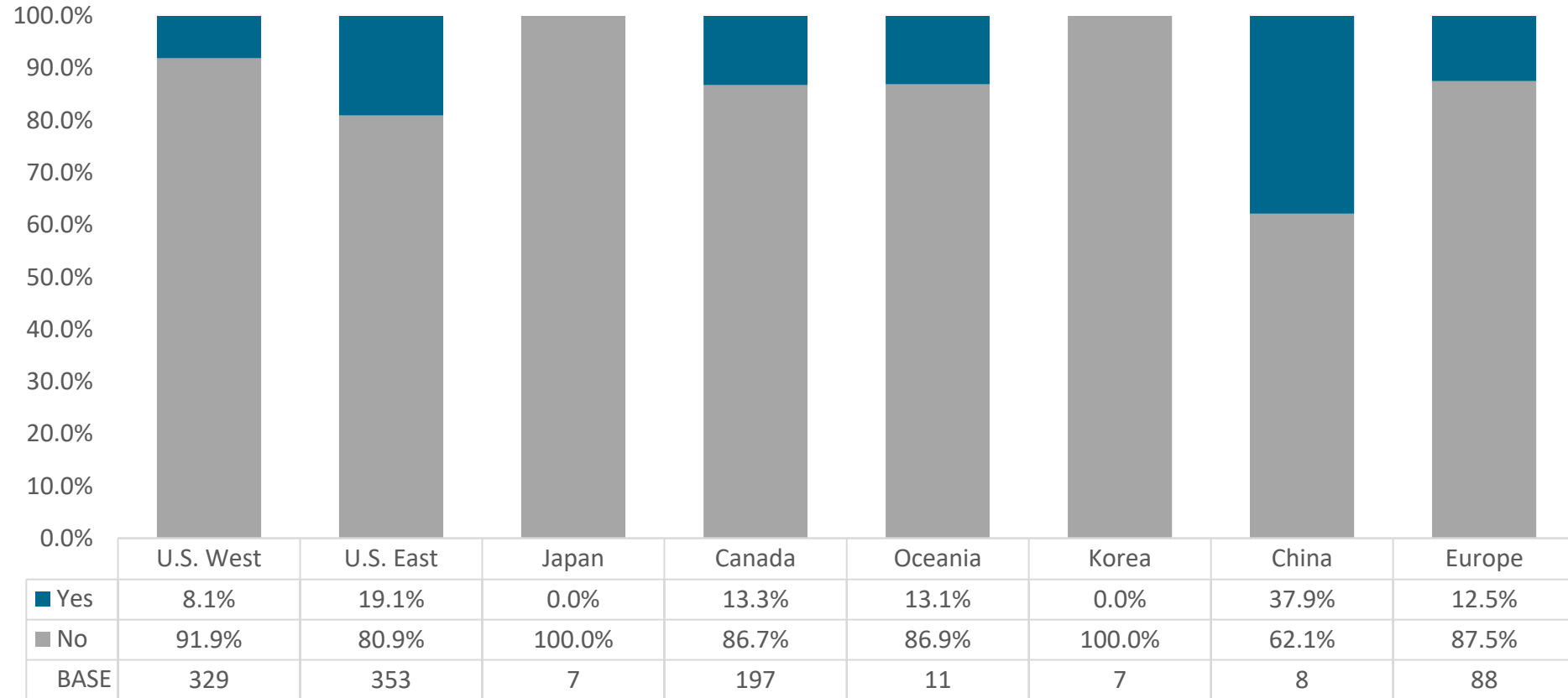
AIDED ADVERTISING AWARENESS - MAUI



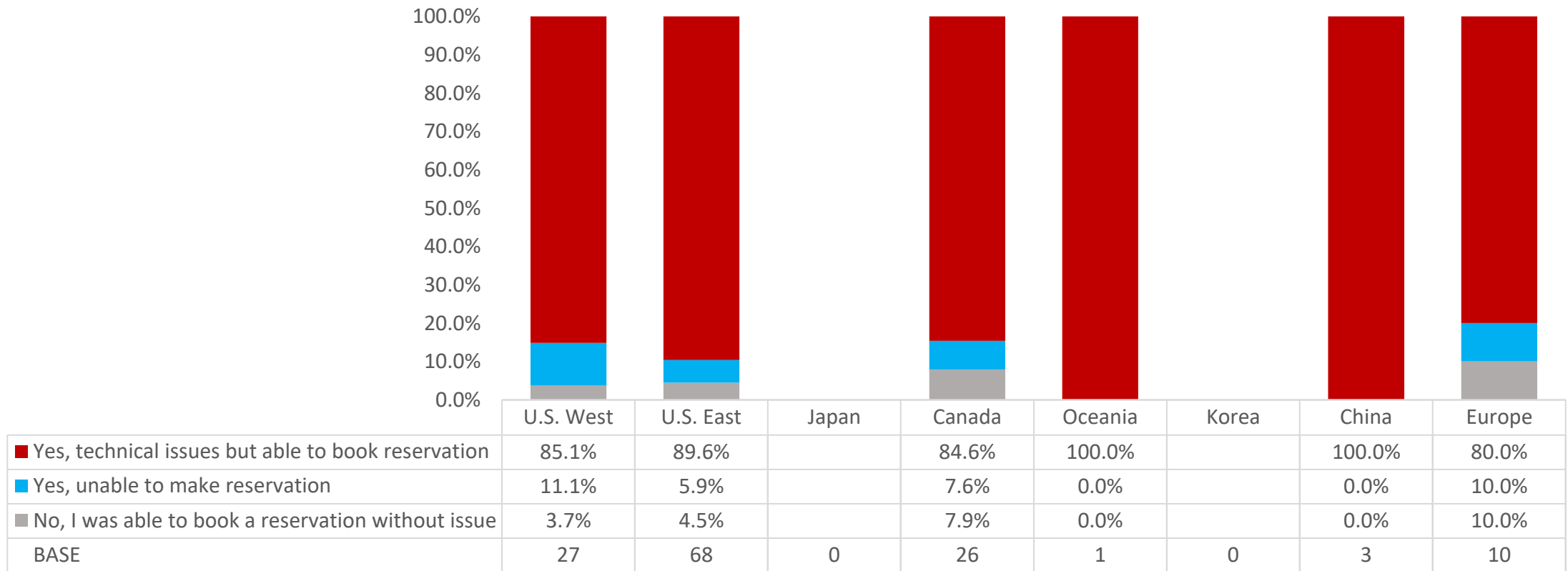
MOTIVATING FACTORS - MAUI

	U.S. West	U.S. East	Japan	Canada	Oceania	China	Korea	Europe
Famous landmarks or imagery/ natural beauty	37.6%	45.8%	59.0%	38.4%	56.0%	75.0%	62.3%	46.4%
Hawaiian cultural events	8.7%	14.5%	0.0%	11.2%	0.0%	0.0%	0.0%	7.4%
Outdoor or sporting activities and events	15.1%	15.8%	0.0%	13.5%	44.0%	25.8%	24.6%	18.9%
Social media posts and videos	10.1%	14.4%	27.4%	17.0%	12.1%	12.9%	36.9%	17.9%
Hawaiian music	7.3%	4.7%	0.0%	9.7%	8.0%	0.0%	0.0%	2.1%
Television programs or movies filmed in Hawai'i	4.6%	4.2%	13.7%	10.2%	8.0%	0.0%	0.0%	11.6%
BASE	345	374	7	206	12	8	8	95

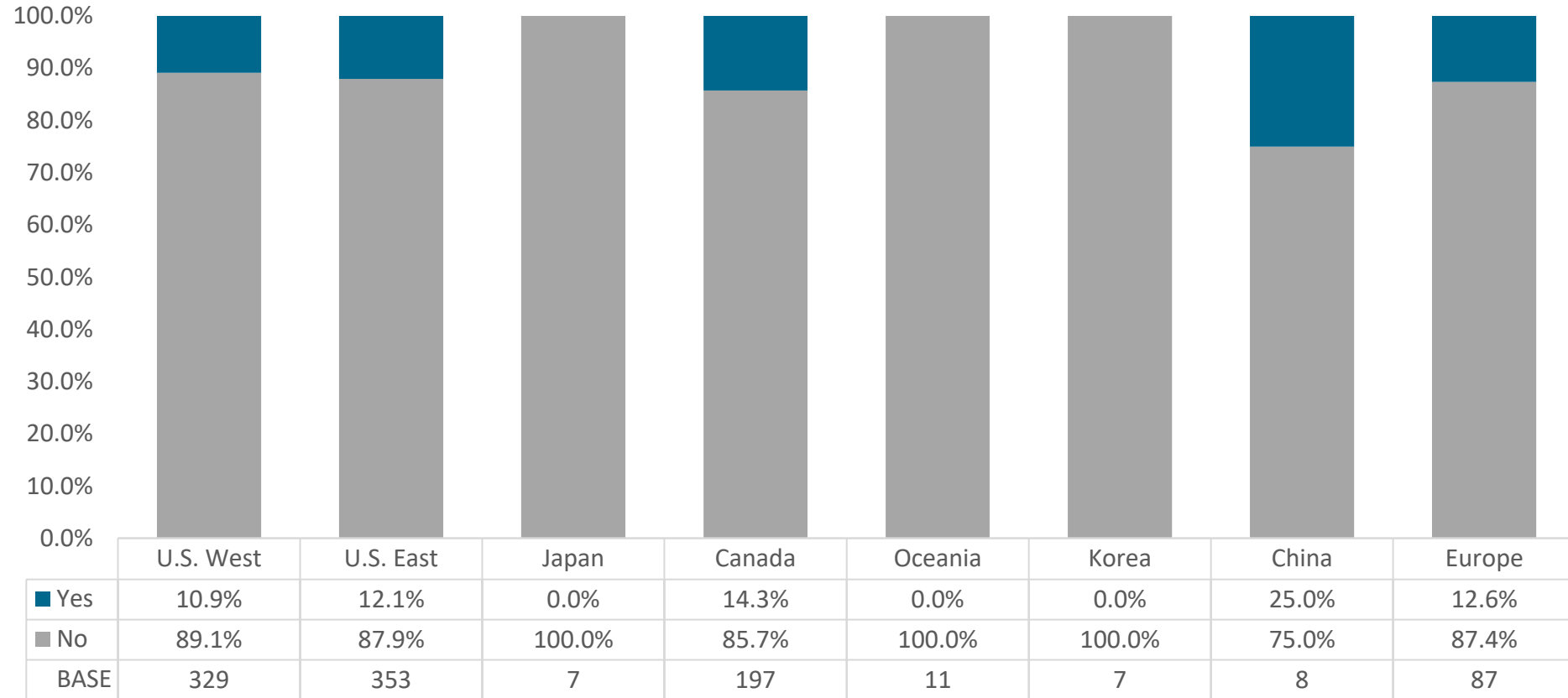
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM USE



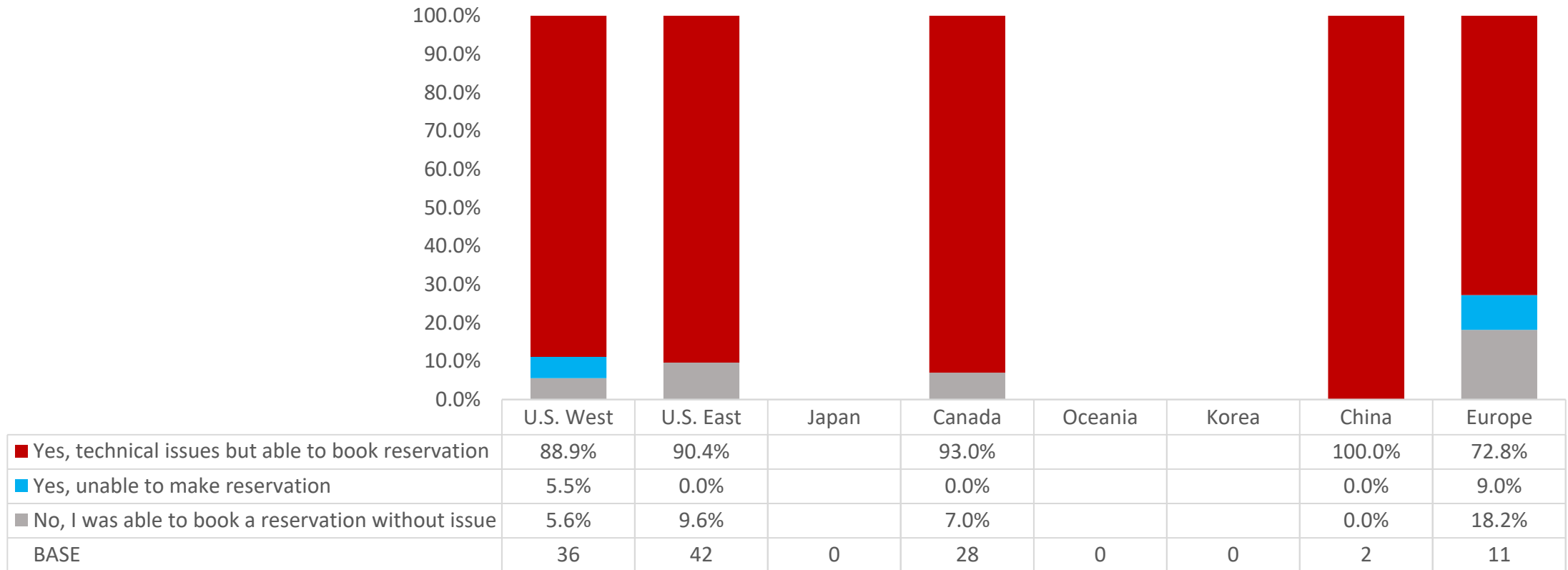
WAI'ĀNAPANAPA STATE PARK - RESERVATIONS SYSTEM PROBLEMS



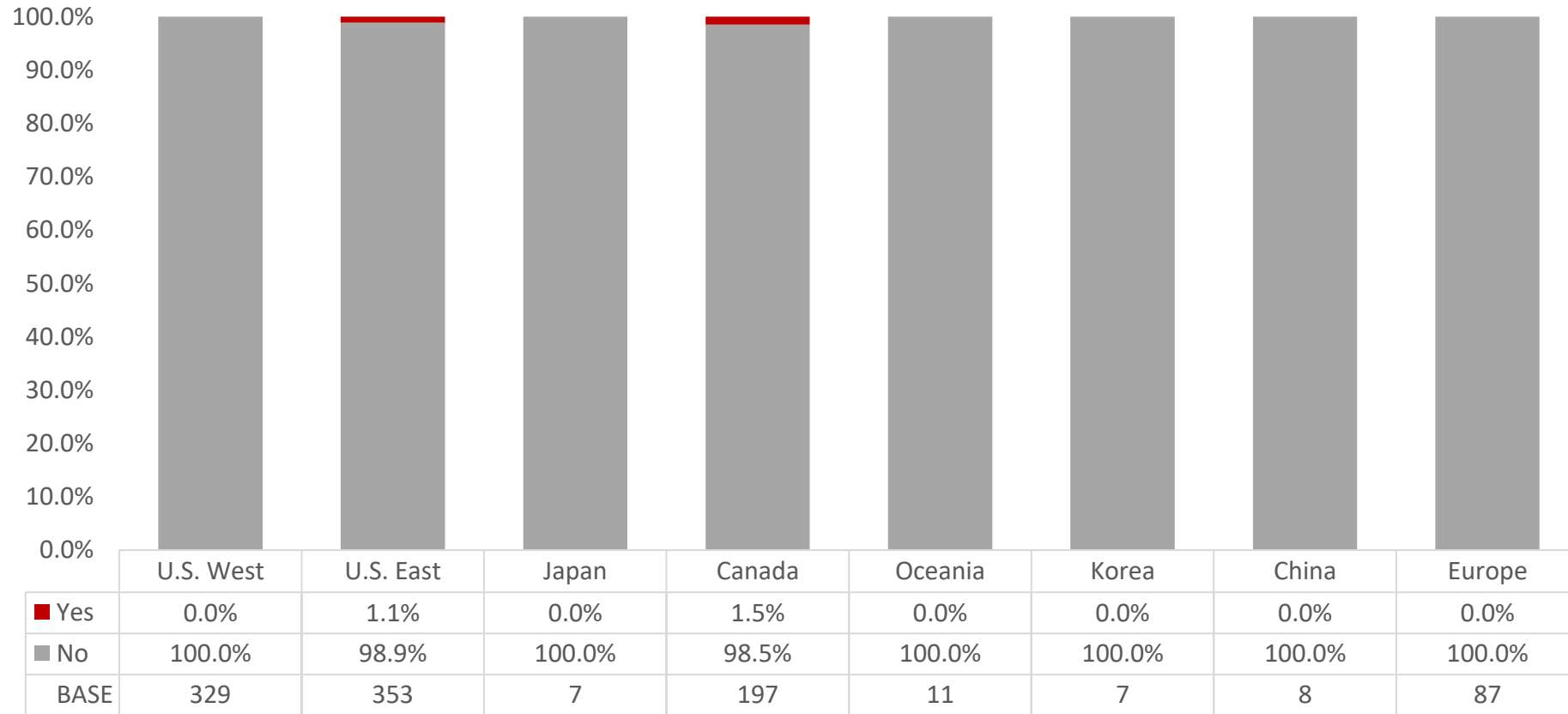
'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM USE



'IAO VALLEY STATE MONUMENT - RESERVATIONS SYSTEM PROBLEMS



VISITED MAUI FOR SPECIFIC EVENT



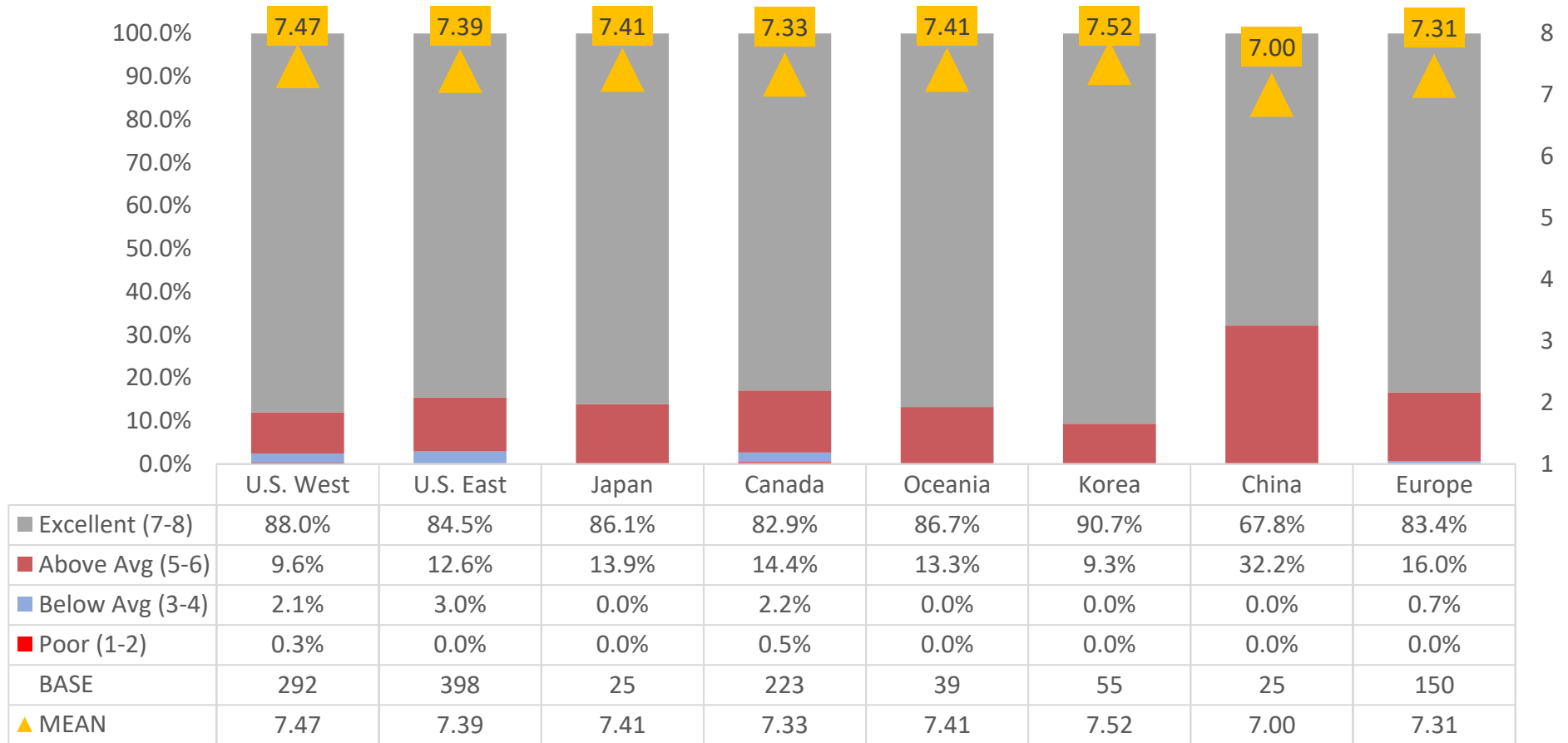
VISITED MAUI FOR SPECIFIC EVENT

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Maui Marathon	0.0%	100%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Festival/concert	0.0%	0.0%	0.0%	66.7%	0.0%	0.0%	0.0%	0.0%
Other sporting event	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%
Total	0	4	0	3	0	0	0	0

Section 8 – Island of Hawai‘i

SATISFACTION - ISLAND OF HAWAI‘I

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



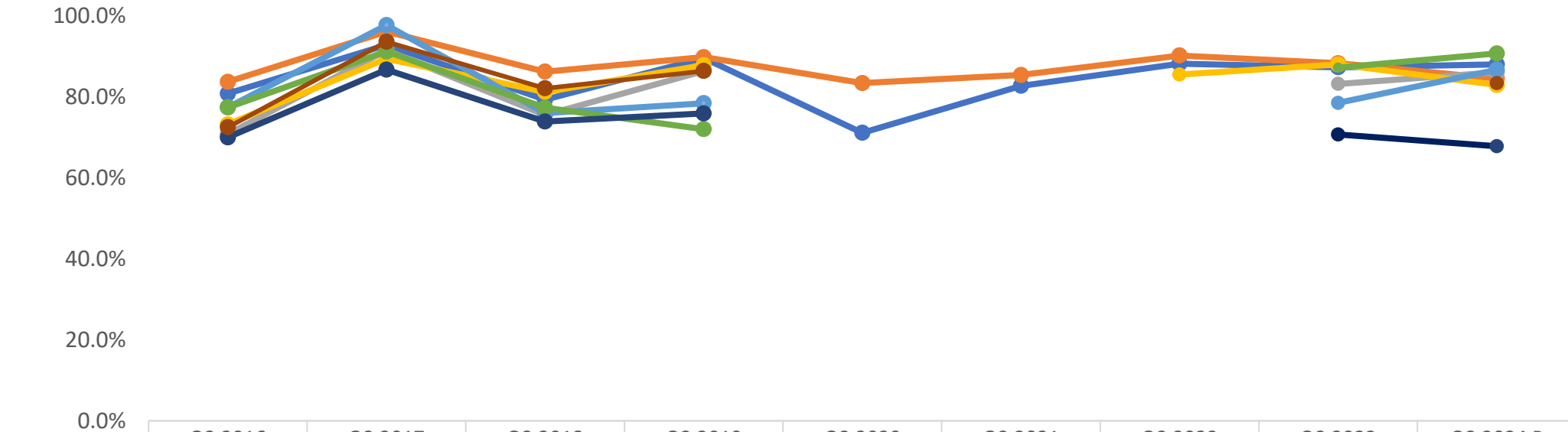
SATISFACTION - ISLAND OF HAWAI'I

- **Gender:** Female respondents from **U.S. East** gave higher satisfaction scores than male respondents.
- **Age:** Visitors from **U.S. West** between the ages of 18-34 were the most satisfied with their stay compared to visitors from other age groups.

SATISFACTION - ISLAND OF HAWAI‘I

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

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



	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	80.8%	92.8%	79.3%	89.6%	71.1%	82.7%	88.2%	87.3%	88.0%
U.S. East	83.7%	96.1%	86.2%	89.8%	83.4%	85.4%	90.2%	88.3%	84.5%
Japan	70.8%	91.5%	75.5%	86.4%				83.2%	86.1%
Canada	73.2%	89.4%	81.2%	87.8%			85.5%	88.0%	82.9%
Oceania	77.4%	97.7%	76.0%	78.4%				78.5%	86.7%
Korea	77.4%	91.2%	77.3%	72.0%				87.2%	90.7%
China	70.0%	86.7%	73.9%	75.9%				70.7%	67.8%
Europe	72.5%	93.6%	82.1%	86.4%					83.4%

P= Preliminary Data

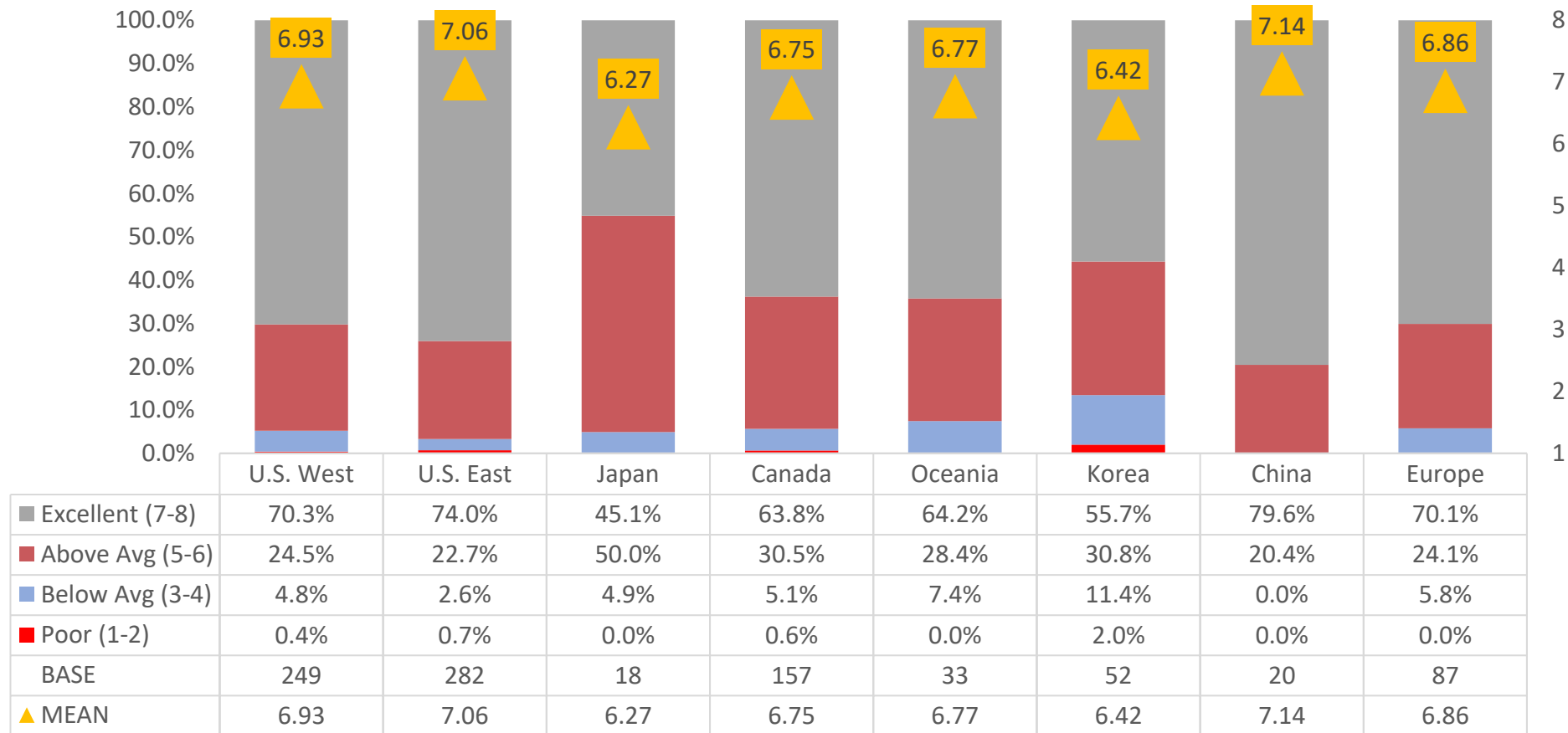
Q. How would you rate your most recent trip to the state of Hawai‘i? How would you rate your experience on___?

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.



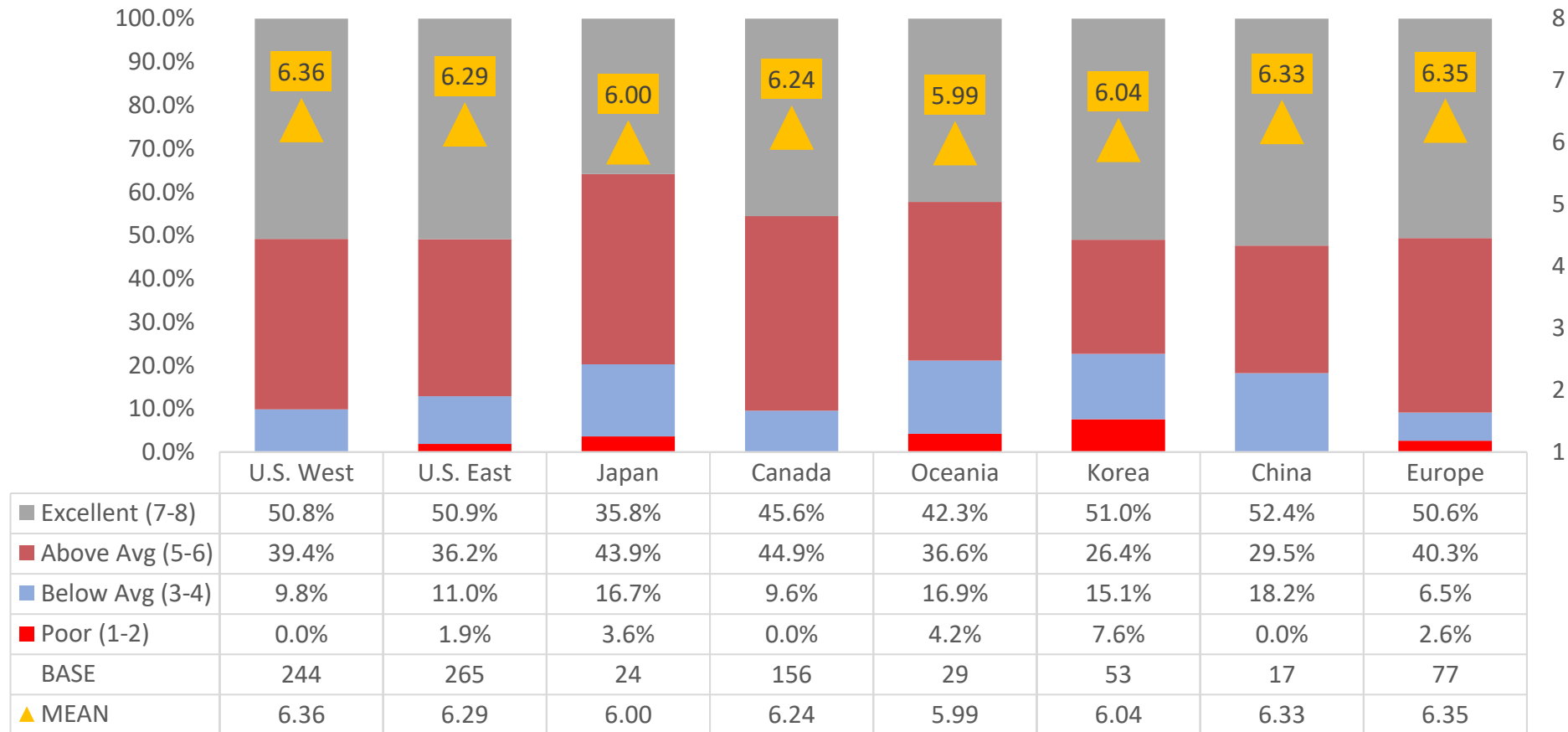
ENTERTAINMENT/ ATTRACTIONS - ISLAND OF HAWAI'I

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



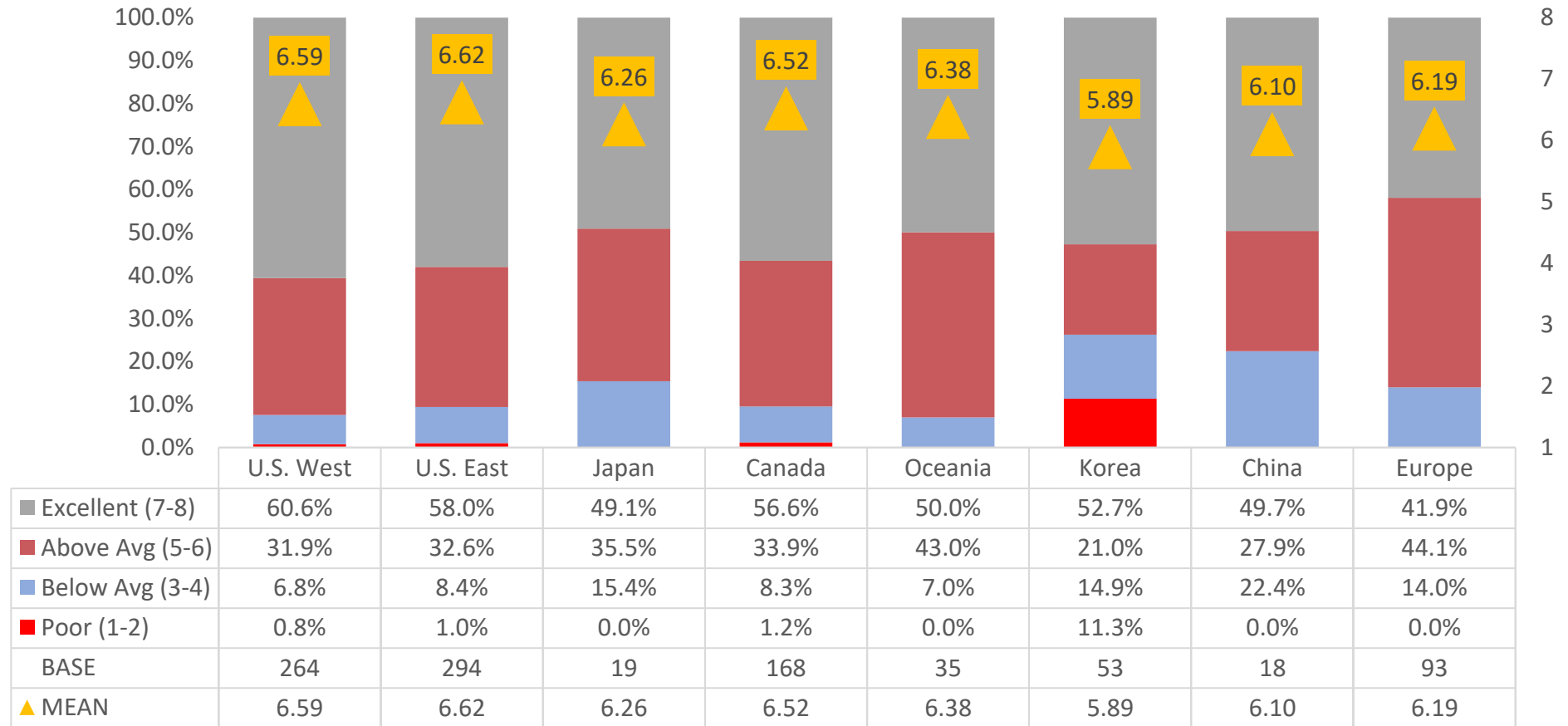
SHOPPING - ISLAND OF HAWAI‘I

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



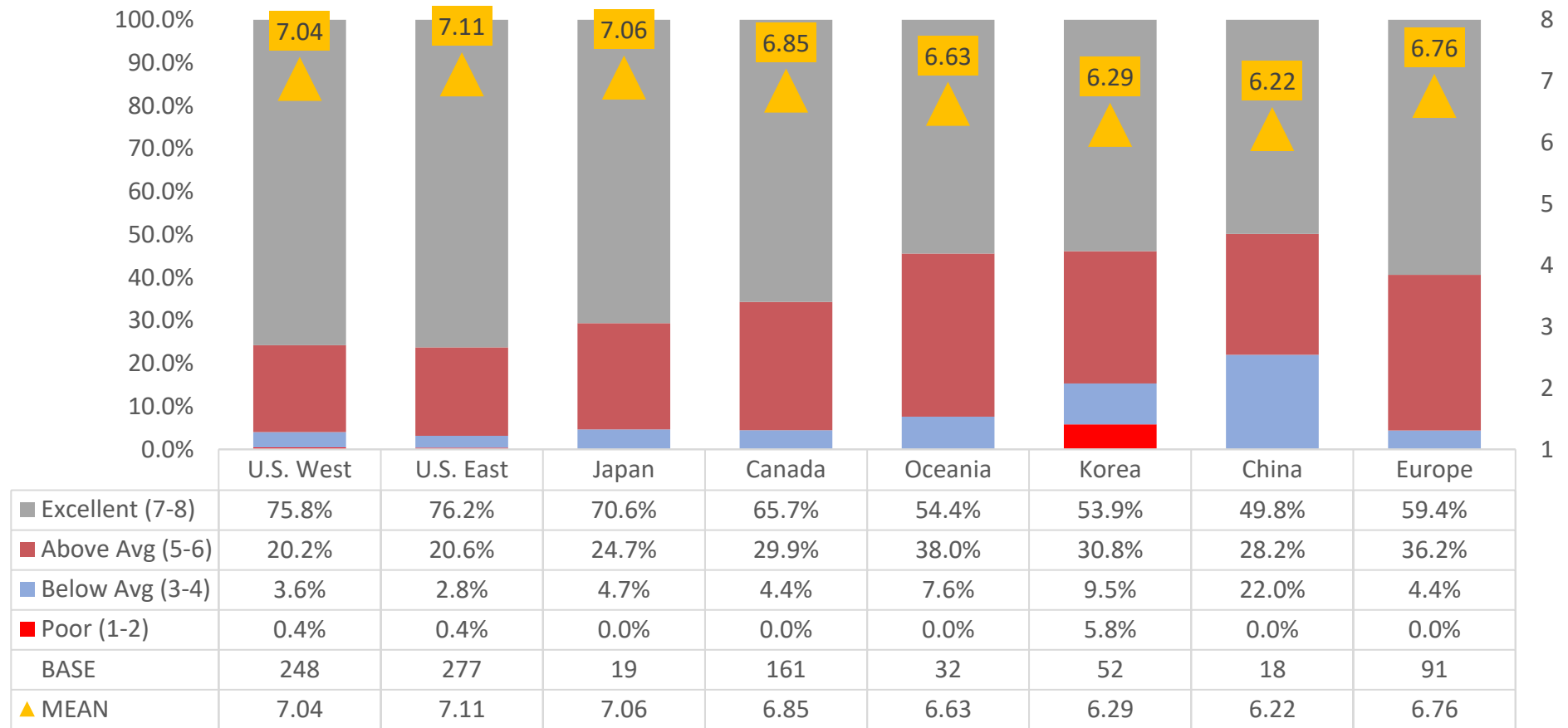
DINING/ FOOD & BEVERAGE - ISLAND OF HAWAI'I

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



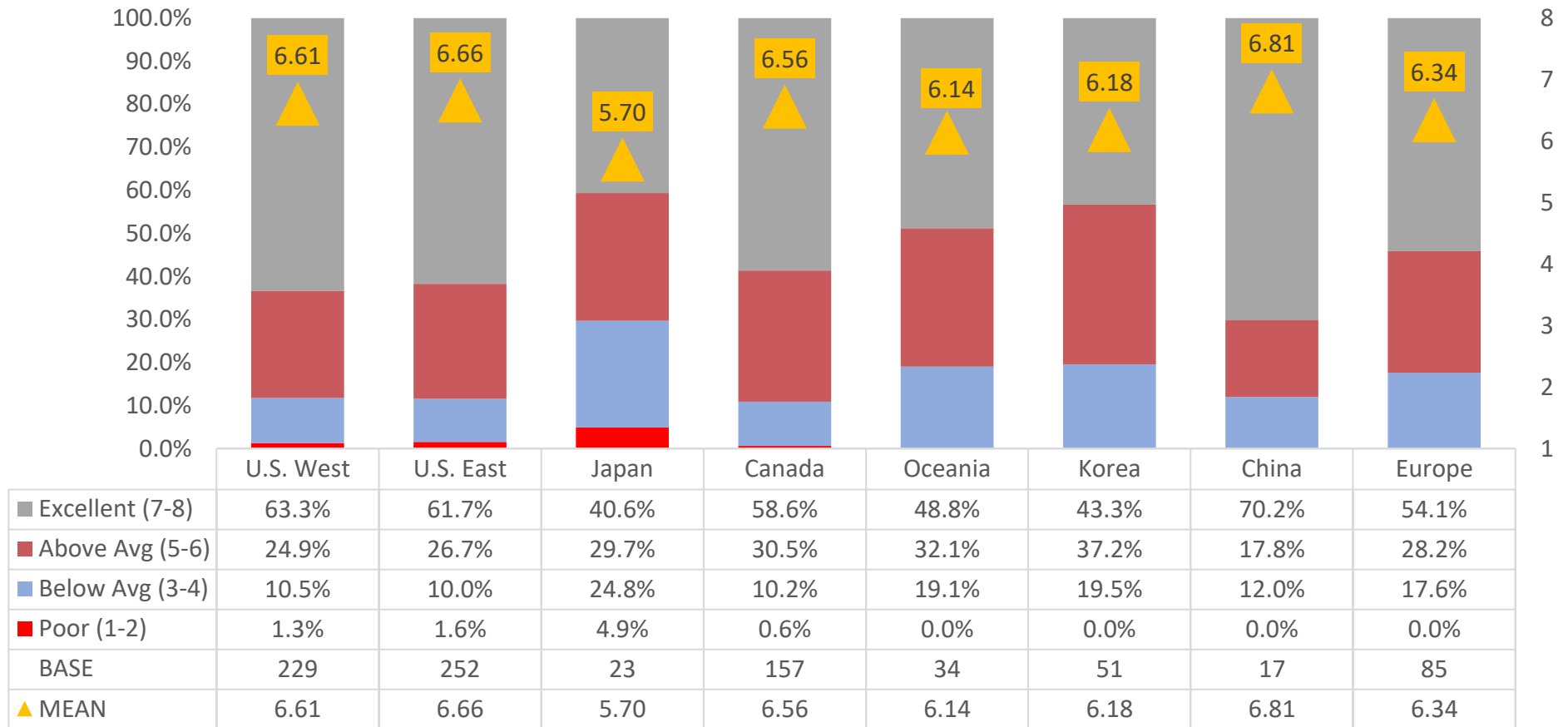
LODGING/ ACCOMMODATIONS - ISLAND OF HAWAI'I

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



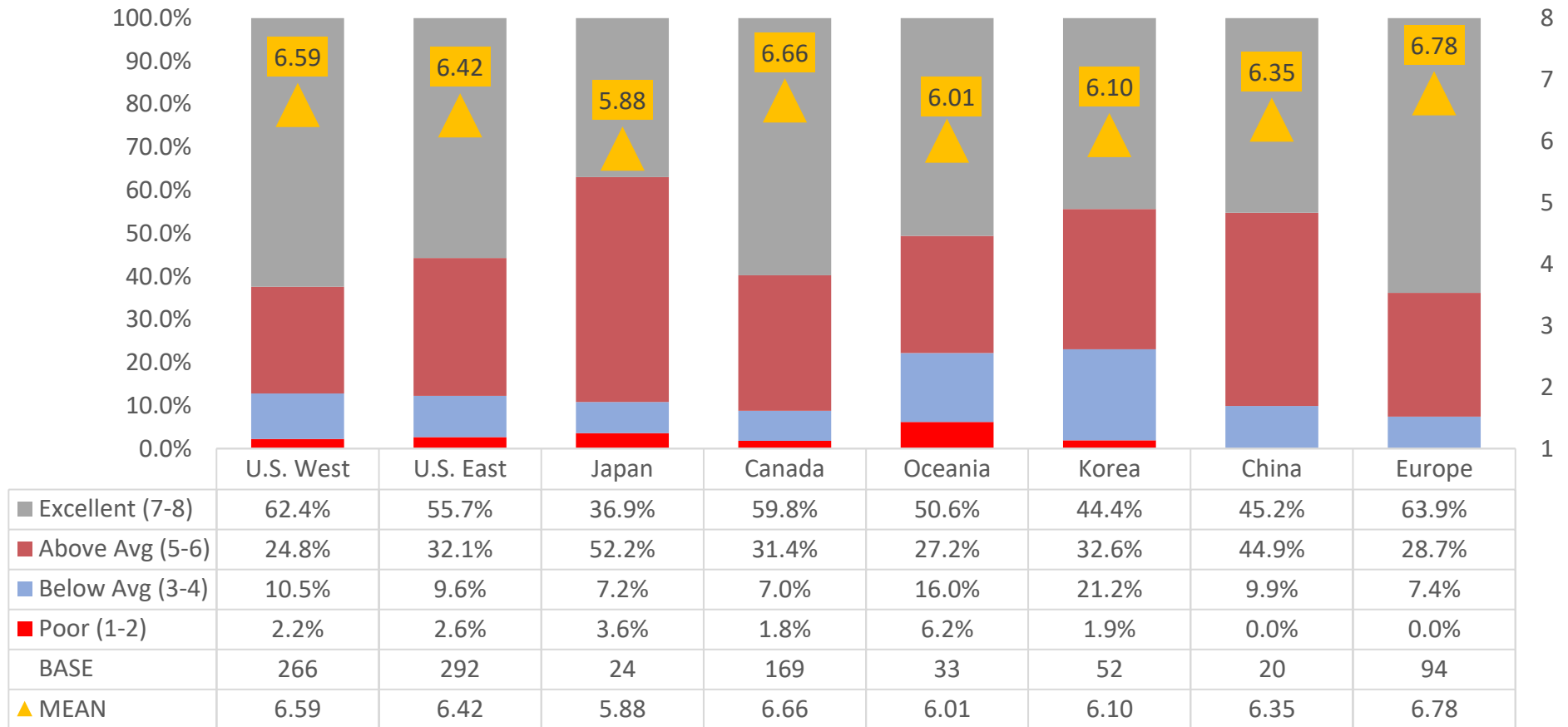
TRANSPORTATION ON ISLAND - ISLAND OF HAWAI'I

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



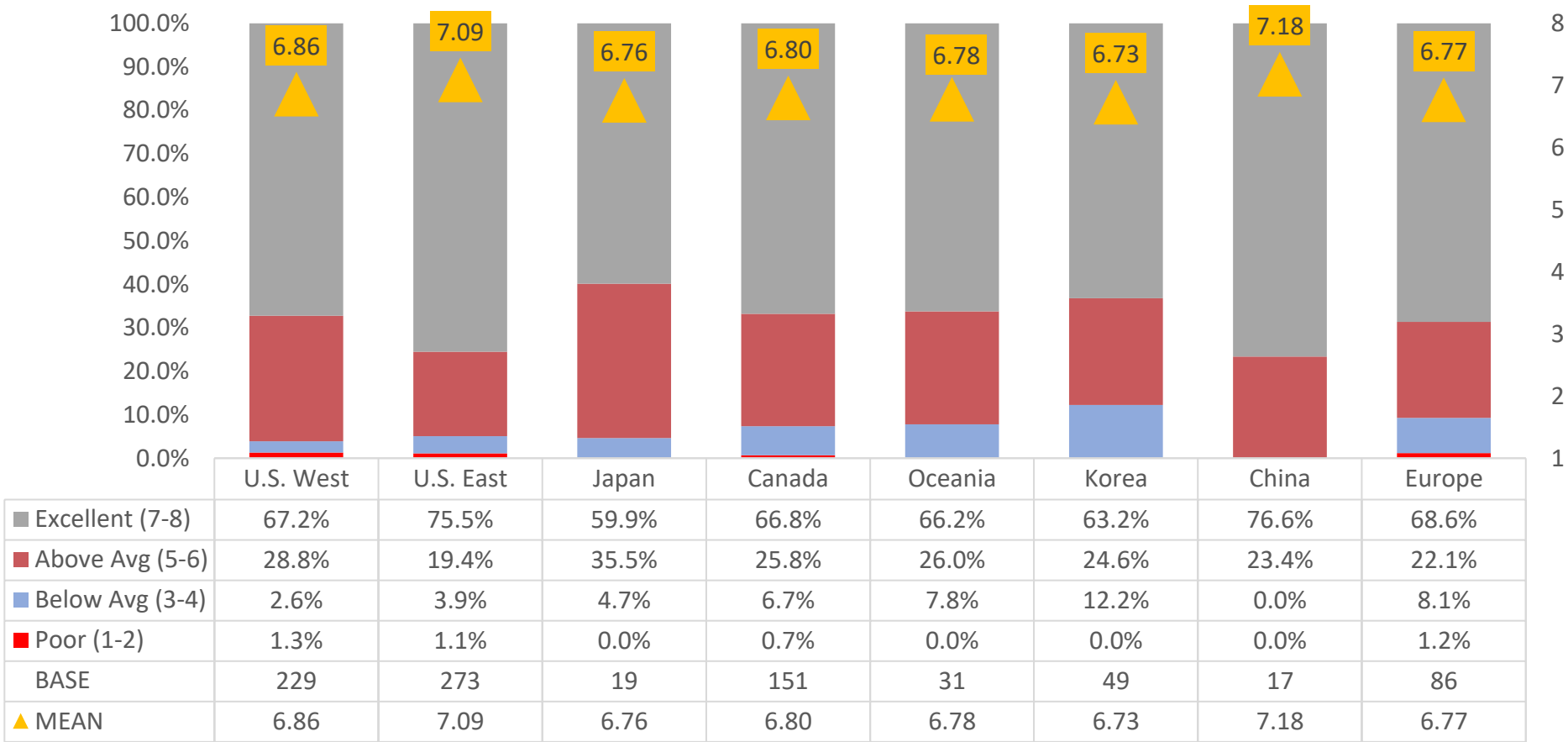
AIRPORT- ISLAND OF HAWAI'I

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



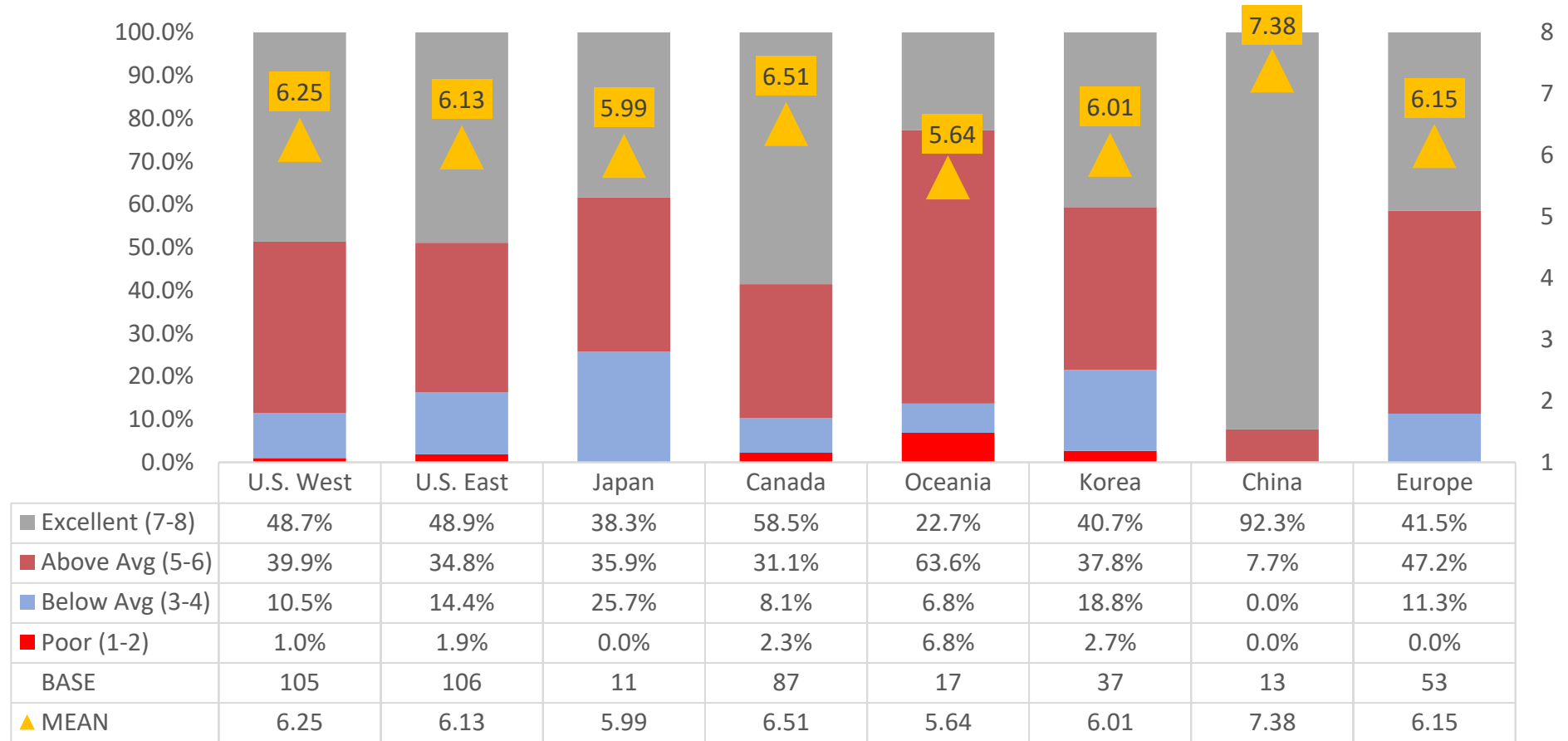
CULTURAL EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



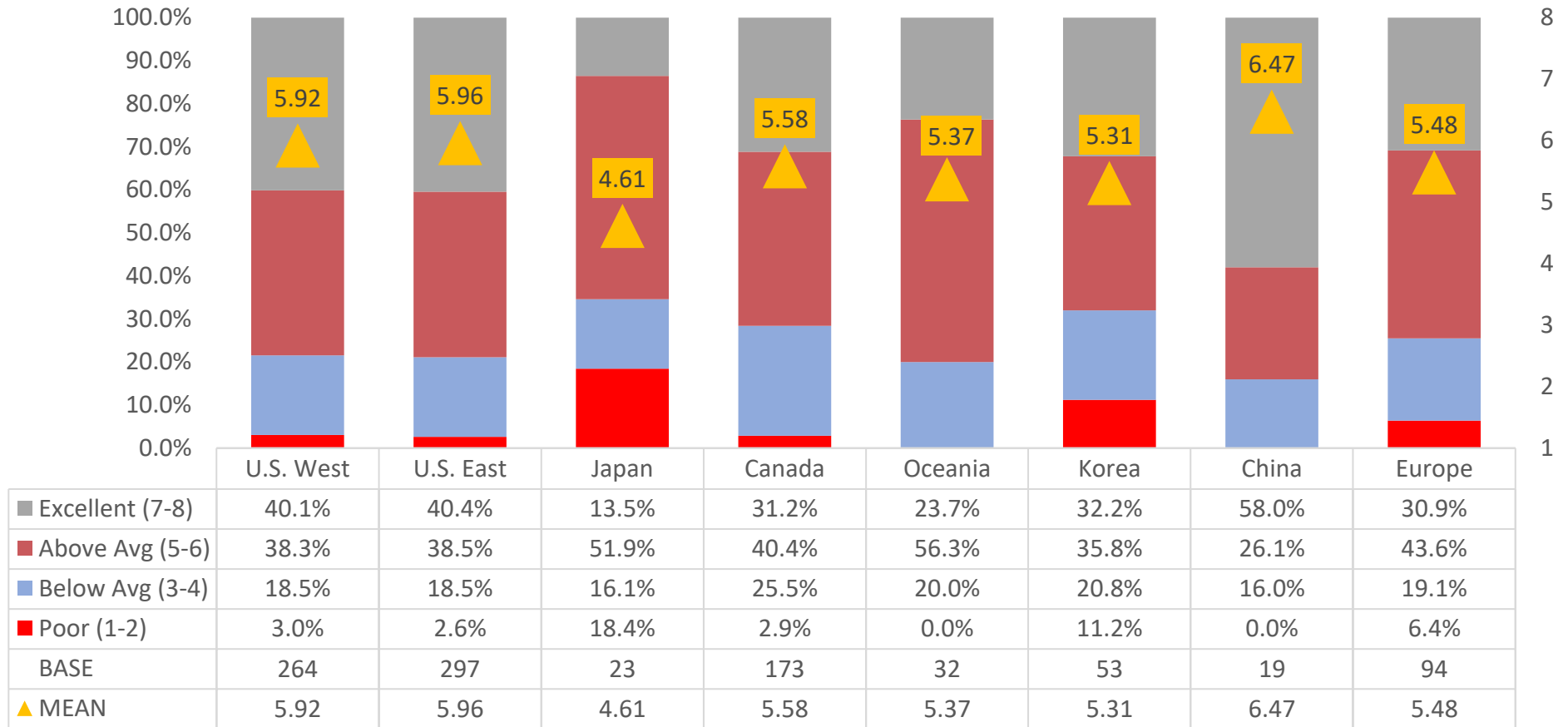
VOLUNTEER EXPERIENCES ON ISLAND - ISLAND OF HAWAI'I

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



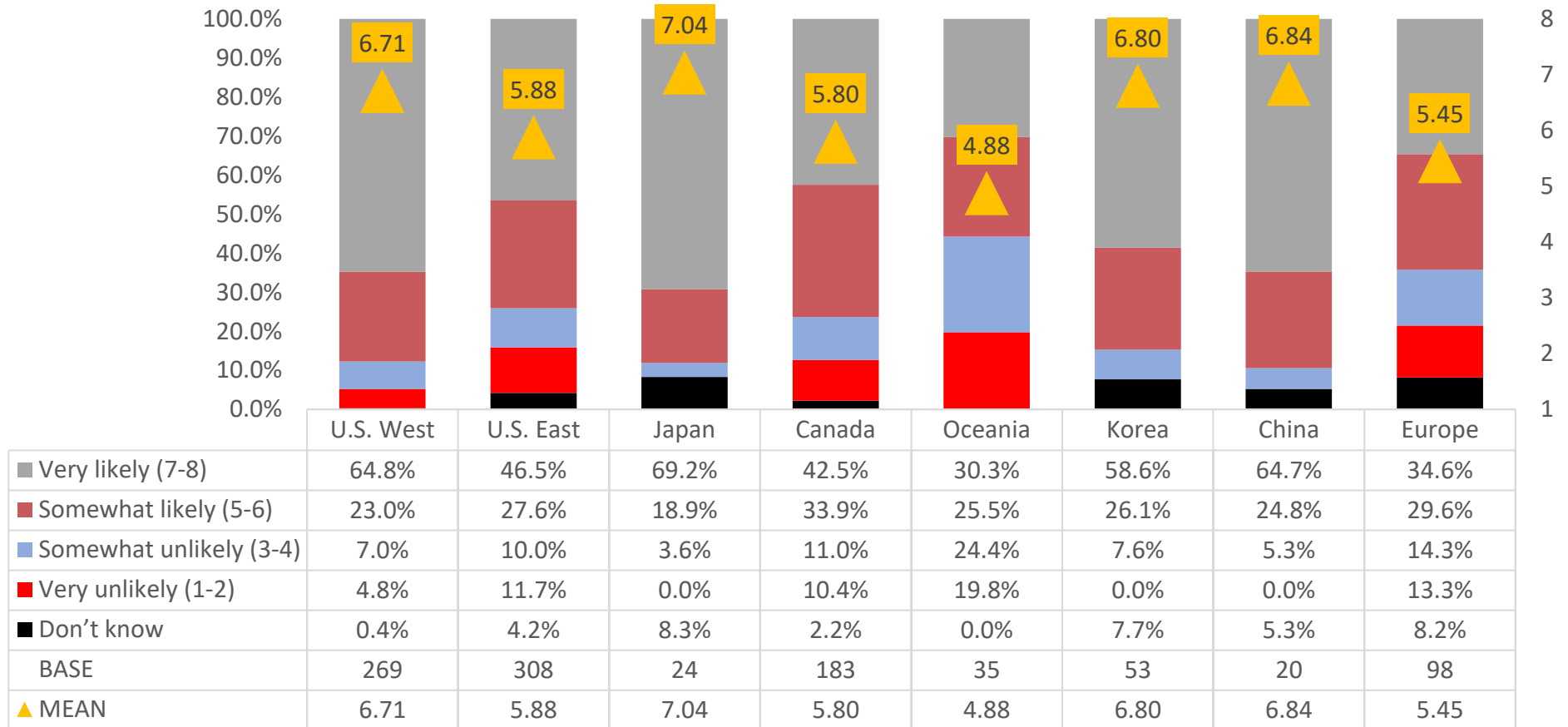
VALUE FOR THE MONEY ON ISLAND - ISLAND OF HAWAI'I

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



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

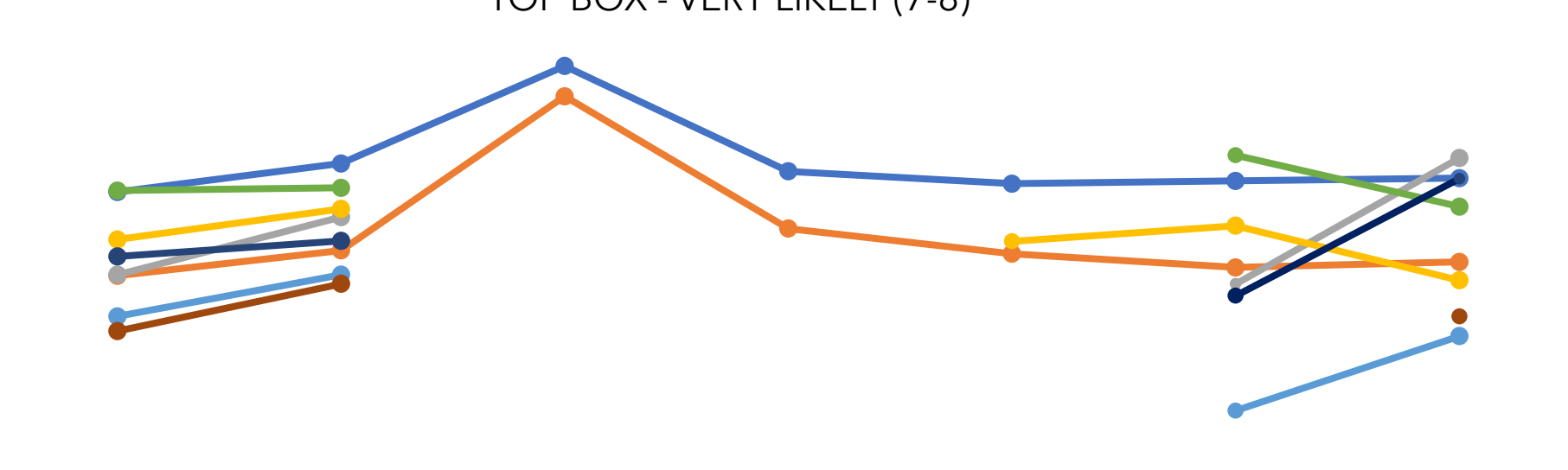
8-pt Rating Scale
8=Very likely/ 1=Very unlikely



LIKELIHOOD OF RETURN VISIT - ISLAND OF HAWAI'I

TOP BOX - VERY LIKELY (7-8)

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

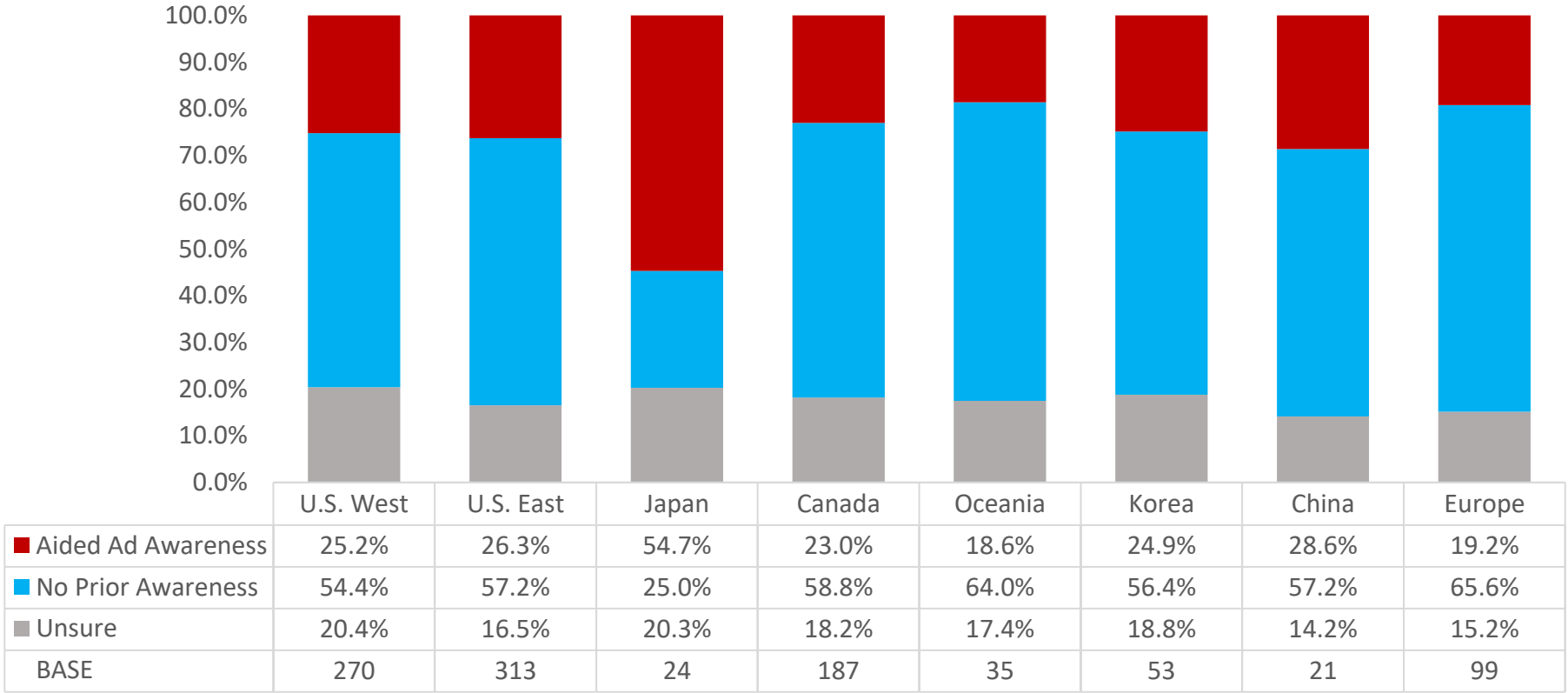


	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022	Q2 2023	Q2 2024 P
U.S. West	61.8%	68.0%	89.3%	66.3%	63.6%	64.2%	64.8%
U.S. East	43.5%	49.0%	82.7%	53.8%	48.3%	45.3%	46.5%
Japan	43.7%	56.3%				41.7%	69.2%
Canada	51.4%	58.1%			51.0%	54.4%	42.5%
Oceania	34.6%	43.7%				14.0%	30.3%
Korea	62.1%	62.7%				69.8%	58.6%
China	47.7%	51.1%				39.1%	64.7%
Europe	31.4%	41.7%					34.6%

P= Preliminary Data

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

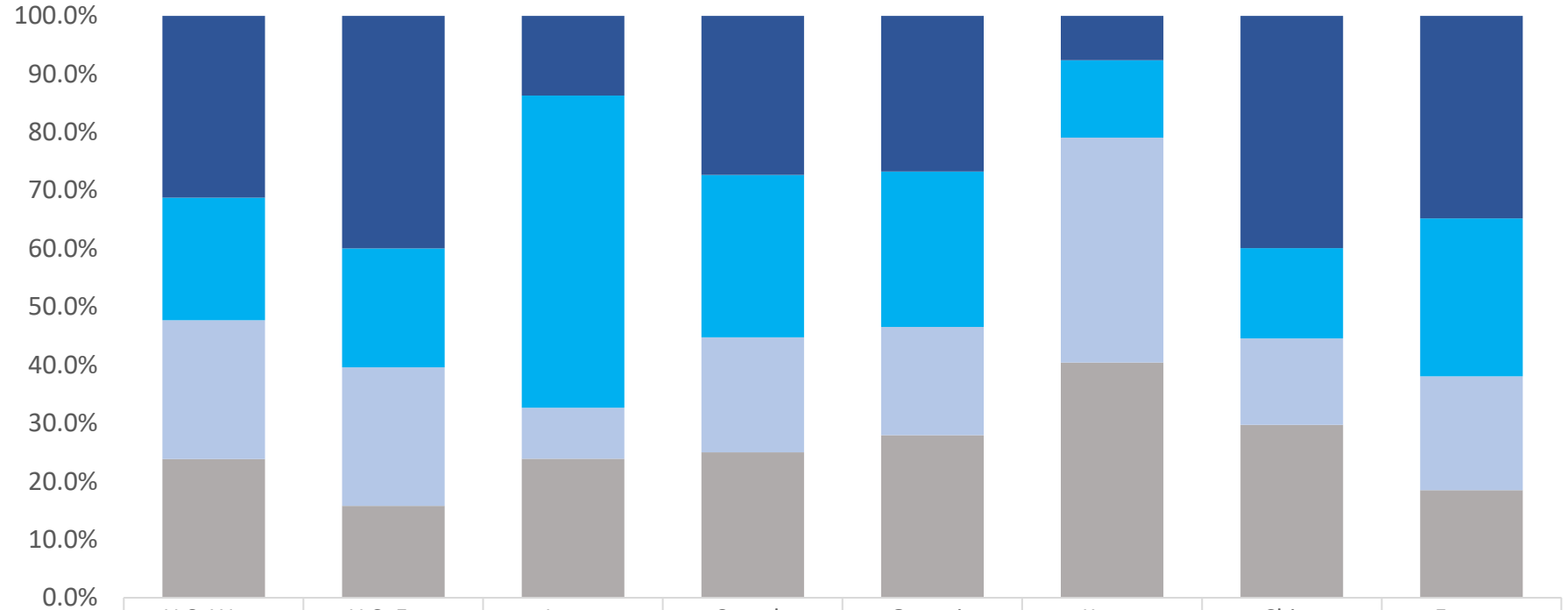
AIDED ADVERTISING AWARENESS - ISLAND OF HAWAI'I



MOTIVATING FACTORS - ISLAND OF HAWAI'I

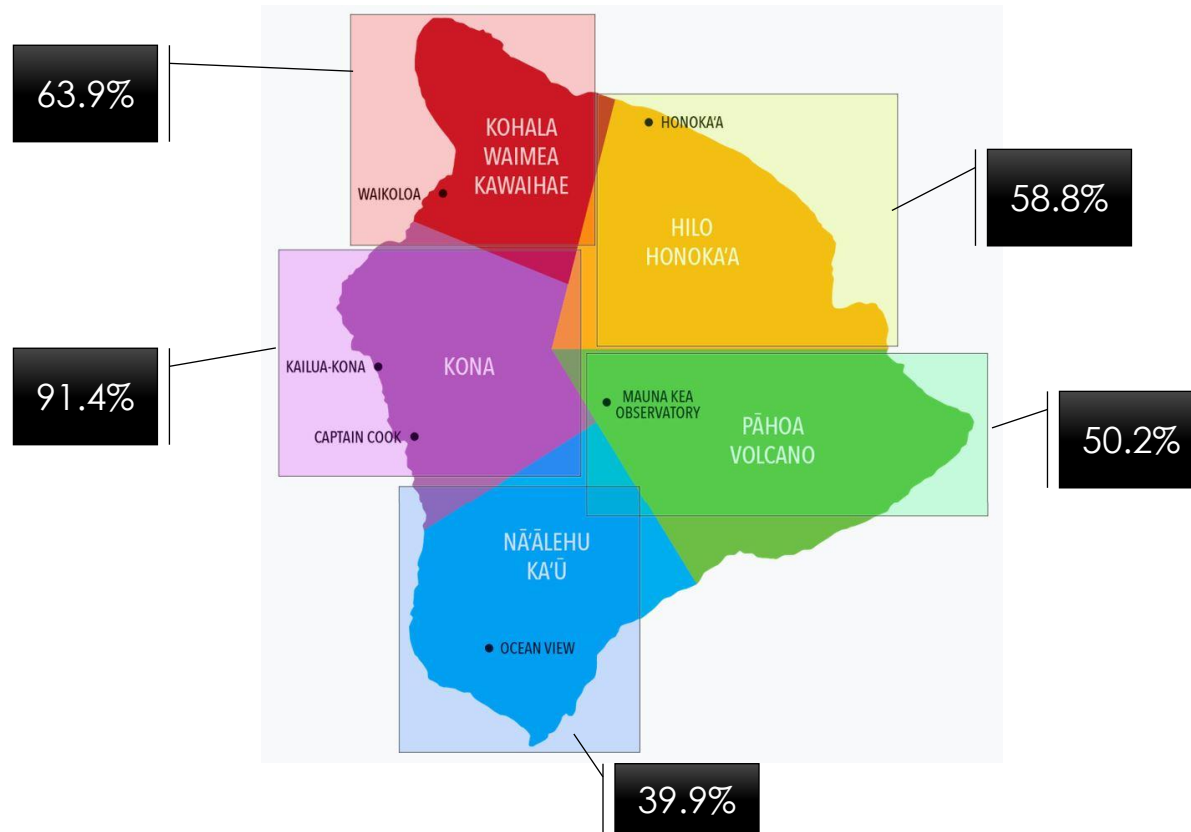
	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Famous landmarks or imagery/ natural beauty	38.5%	56.3%	88.1%	53.5%	65.1%	71.7%	56.6%	56.6%
Outdoor or sporting activities and events	22.6%	14.0%	10.8%	18.8%	18.6%	33.3%	13.3%	15.2%
Social media posts and videos	8.9%	13.5%	7.2%	14.4%	5.8%	14.2%	17.0%	20.2%
Hawaiian cultural events	10.0%	13.1%	3.6%	12.3%	7.0%	14.5%	0.0%	11.1%
Television programs or movies filmed in Hawai'i	6.3%	8.1%	10.8%	6.4%	8.1%	23.9%	11.3%	20.2%
Hawaiian music	6.7%	6.1%	7.2%	6.9%	2.3%	5.0%	1.9%	9.1%
BASE	270	313	24	187	35	21	53	99

TRAVEL ON ISLAND OF HAWAI'I

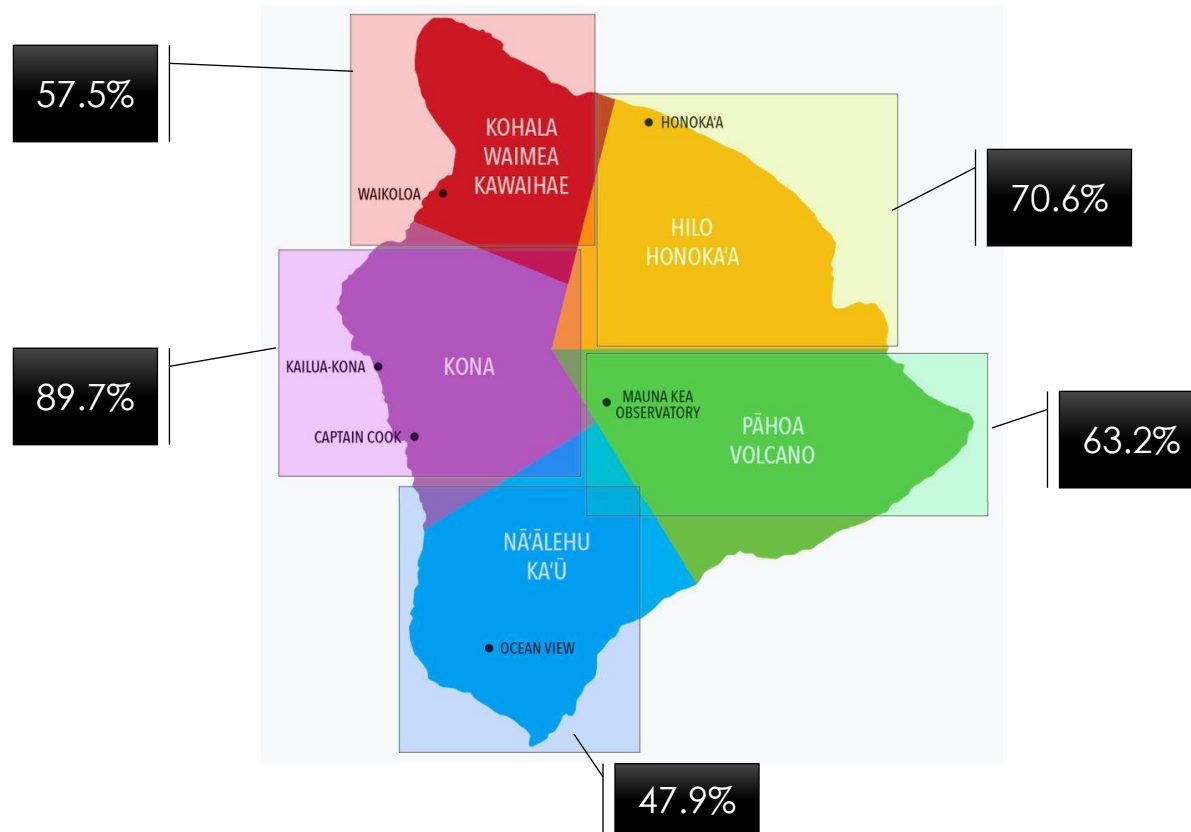


	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
Traveled to other side of island	31.2%	40.0%	13.7%	27.3%	26.8%	7.6%	39.9%	34.8%
Traveled more than 1 hour one way to reach activities	21.1%	20.4%	53.6%	27.9%	26.7%	13.3%	15.5%	27.2%
Traveled 1 hour or less one way to reach activity	23.8%	23.8%	8.7%	19.8%	18.6%	38.6%	14.9%	19.6%
Enjoy activities- short drive from accommodations	23.9%	15.8%	23.9%	25.0%	27.9%	40.4%	29.7%	18.5%
BASE	256	299	23	172	35	52	20	92

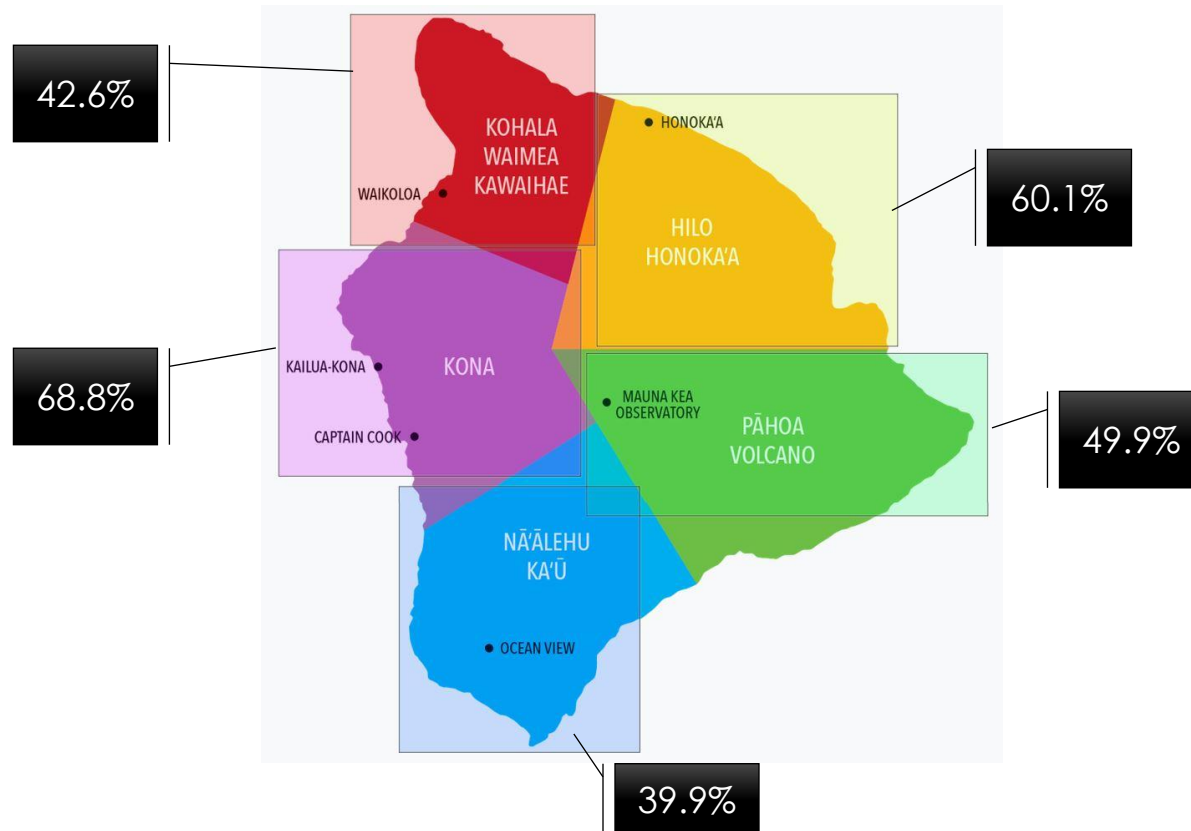
AREAS VISITED ISLAND OF HAWAI'I U.S. WEST



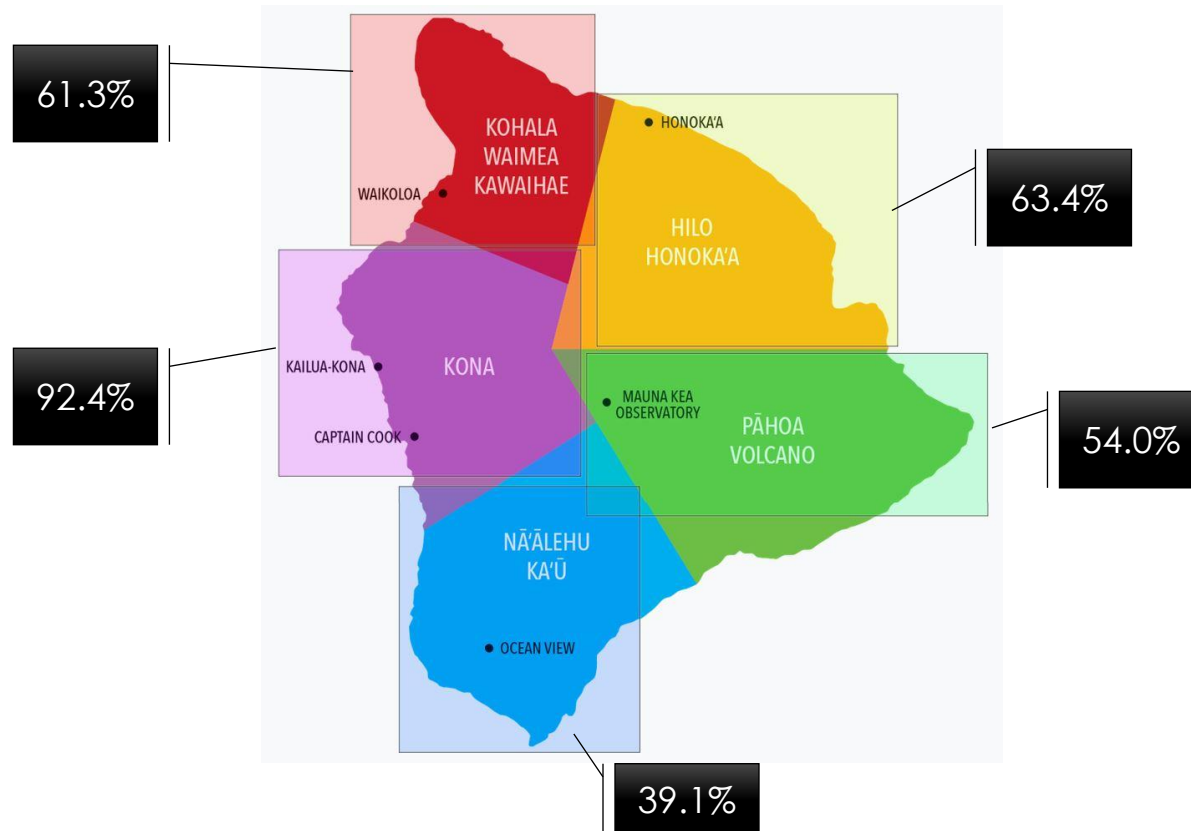
AREAS VISITED ISLAND OF HAWAI'I U.S. EAST



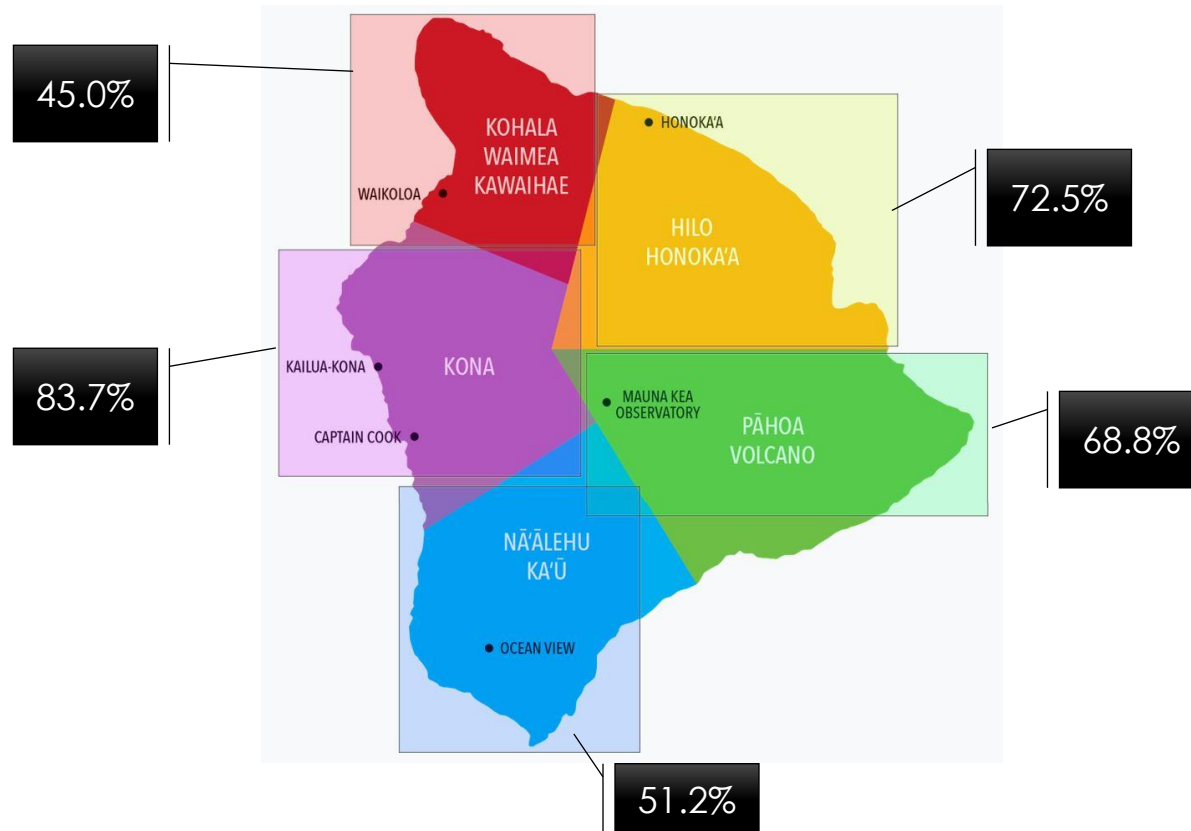
AREAS VISITED ISLAND OF HAWAI'I JAPAN



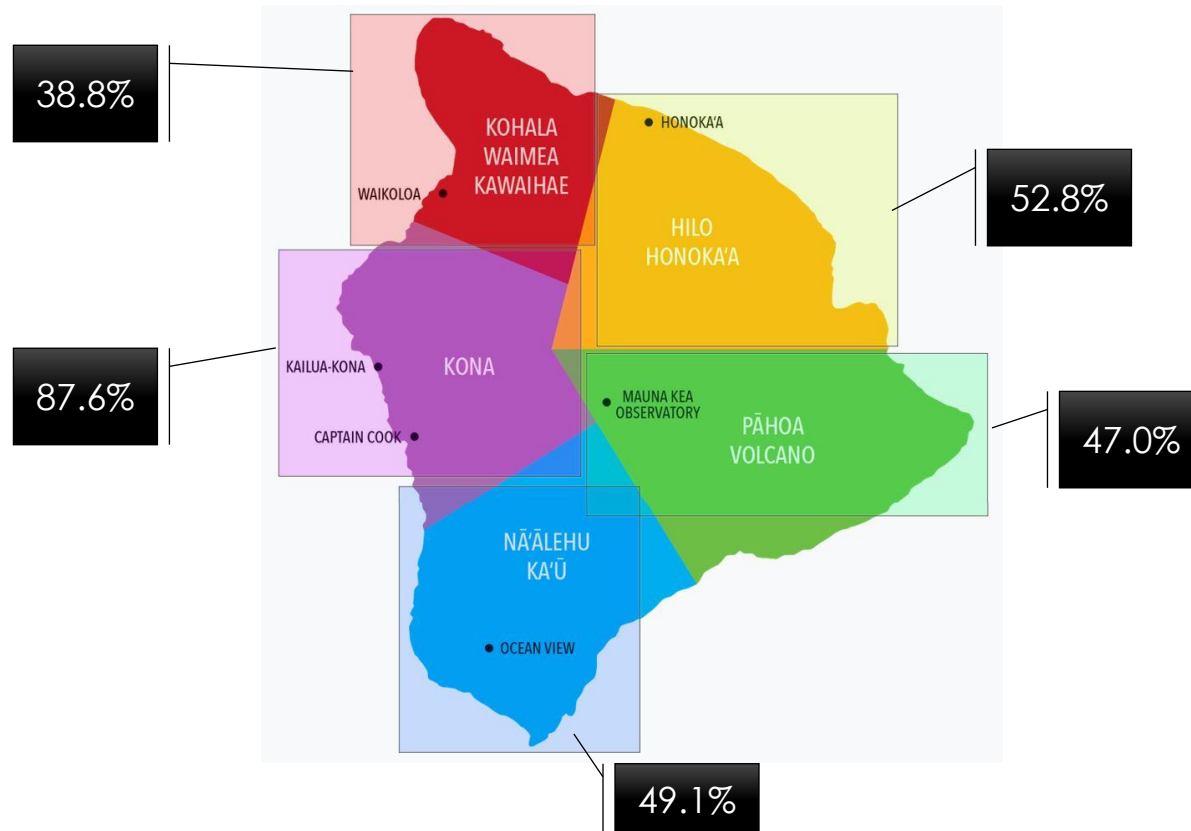
AREAS VISITED ISLAND OF HAWAI'I CANADA



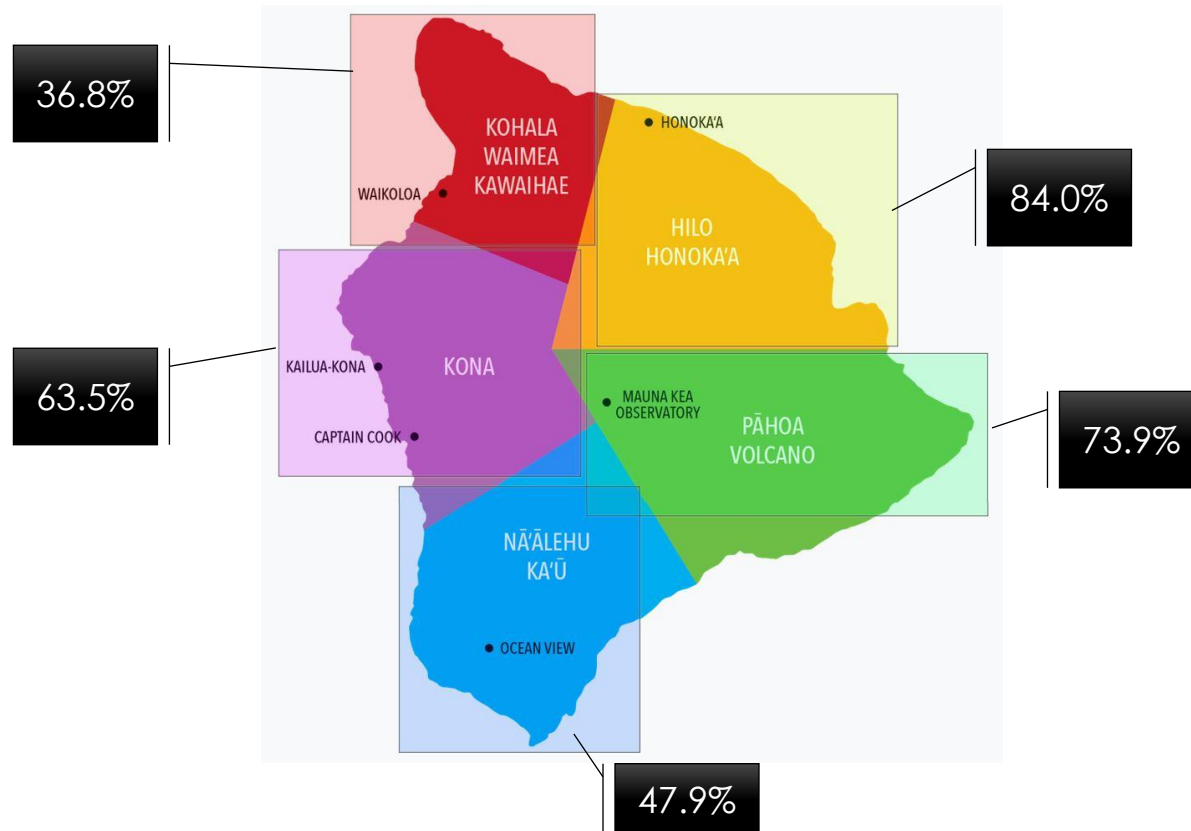
AREAS VISITED ISLAND OF HAWAI'I OCEANIA



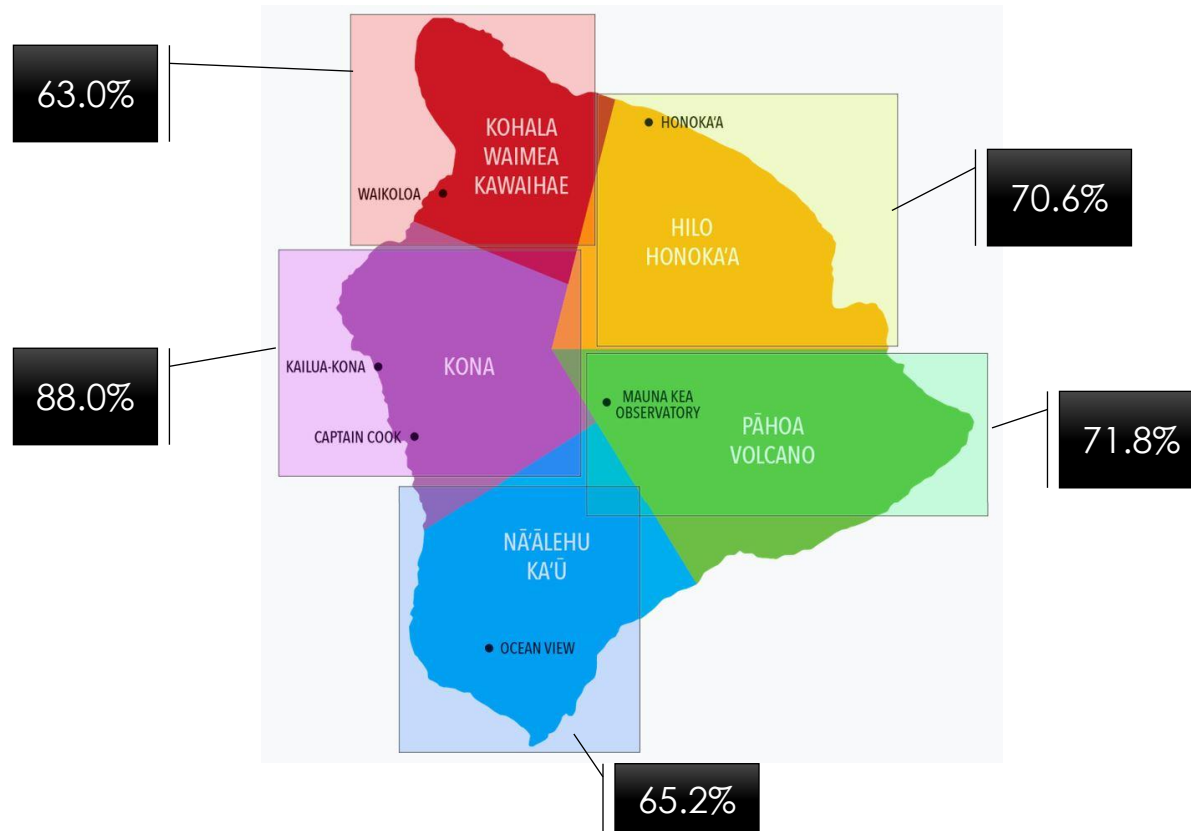
AREAS VISITED ISLAND OF HAWAI'I KOREA



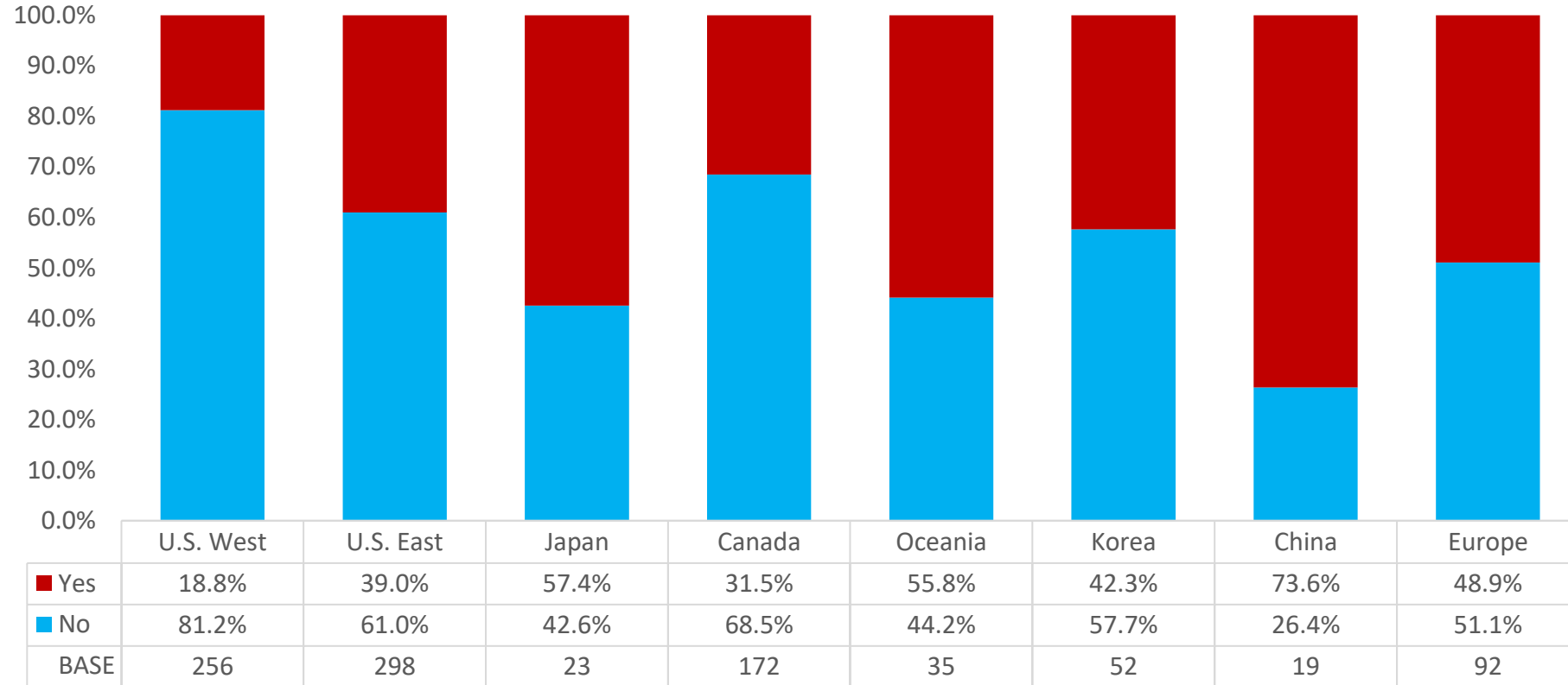
AREAS VISITED ISLAND OF HAWAI'I CHINA



AREAS VISITED ISLAND OF HAWAI'I EUROPE

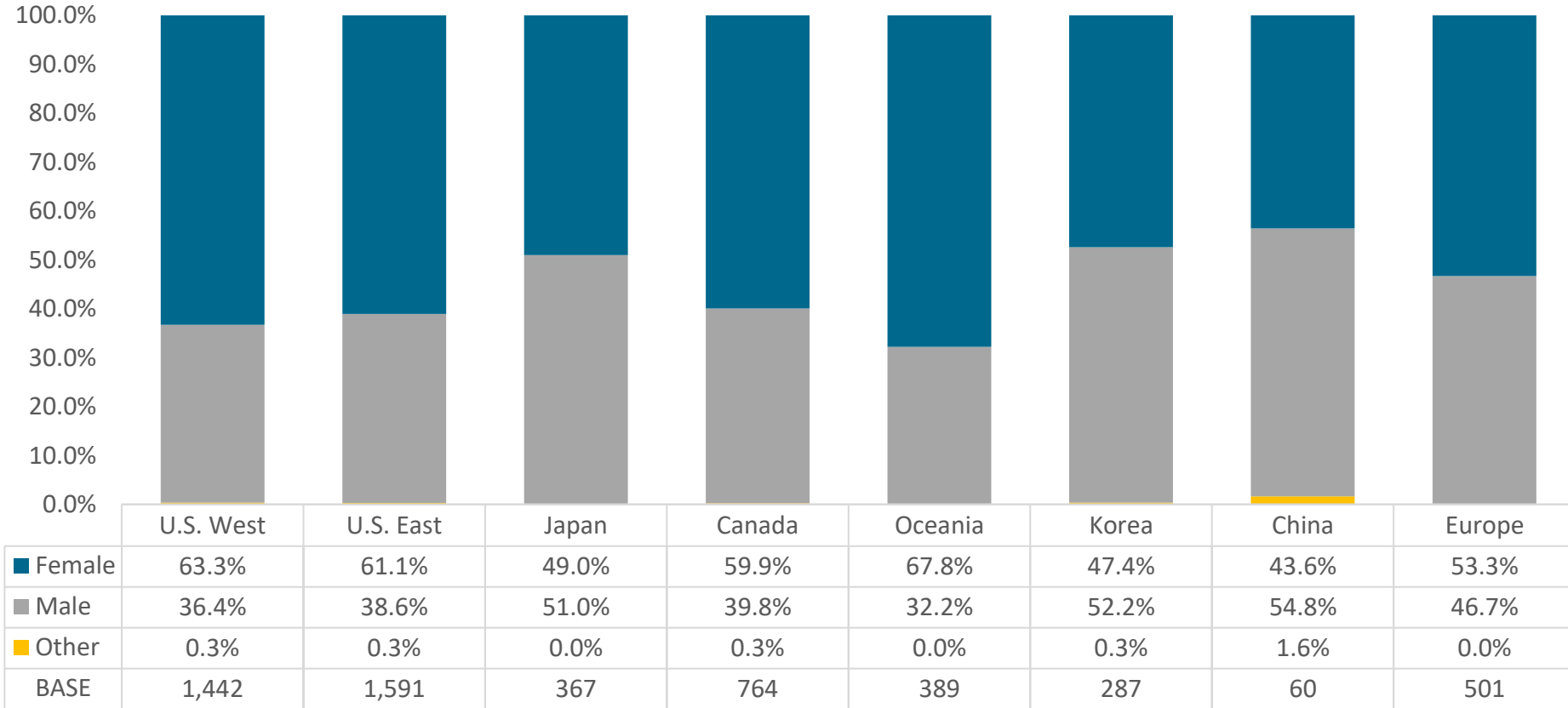


VOLCANIC ERUPTION MOTIVATOR - ISLAND OF HAWAI'I

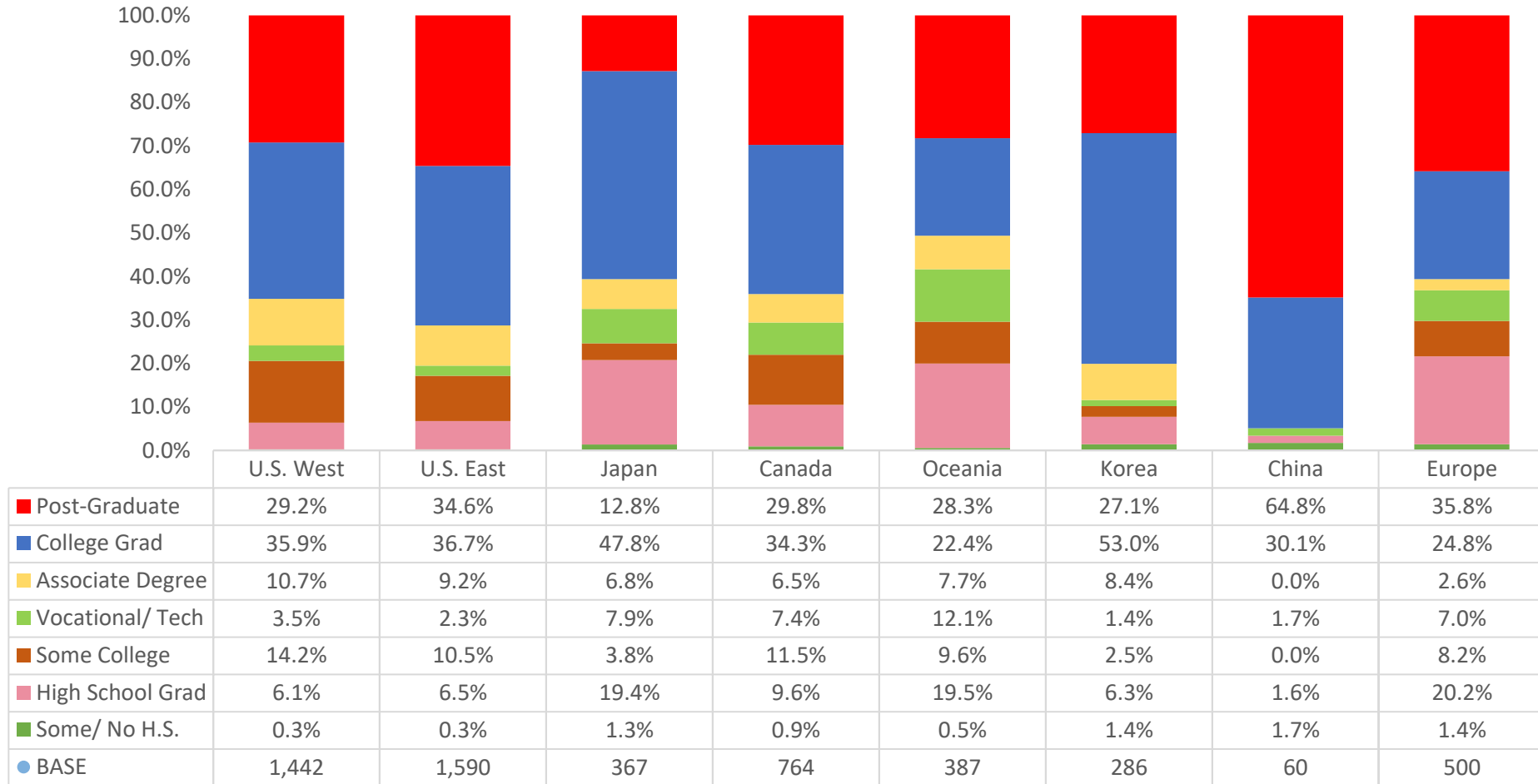


Section 9 – Visitor Profile

VISITOR PROFILE - GENDER



VISITOR PROFILE - EDUCATION



VISITOR PROFILE – HOUSEHOLD INCOME (US\$)

	U.S. West	U.S. East	Canada	Oceania	Europe
< \$40,000	3.1%	5.1%	5.0%	7.8%	18.1%
\$40,000 to \$59,999	5.7%	6.4%	9.3%	10.5%	12.4%
\$60,000 to \$79,999	9.0%	7.8%	8.8%	11.0%	10.1%
\$80,000 to \$99,999	9.4%	9.7%	9.2%	9.8%	12.4%
\$100,000 to \$124,999	13.6%	14.3%	13.6%	12.5%	15.2%
\$125,000 to \$149,999	11.6%	11.4%	11.2%	10.6%	5.7%
\$150,000 to \$174,999	8.6%	9.5%	9.5%	12.5%	7.6%
\$175,000 to \$199,999	7.3%	6.0%	8.2%	7.5%	4.6%
\$200,000 to \$249,999	11.0%	9.3%	10.9%	7.6%	5.0%
\$250,000 +	20.6%	20.4%	14.3%	10.3%	8.9%

VISITOR PROFILE - HOUSEHOLD INCOME (Yen)

	Japanese
< ¥3.5 million	11.5%
¥3.5 - ¥4.5 million	9.7%
¥4.5 - ¥5.5 million	11.8%
¥5.5 - ¥6.5 million	8.6%
¥6.5 - ¥7.5 million	4.9%
¥7.5 - ¥8.5 million	8.2%
¥8.5 - ¥10.0 million	9.2%
¥10.0 - ¥15.0 million	21.4%
¥15.0 - ¥20.0 million	5.8%
¥20.0 million +	8.8%

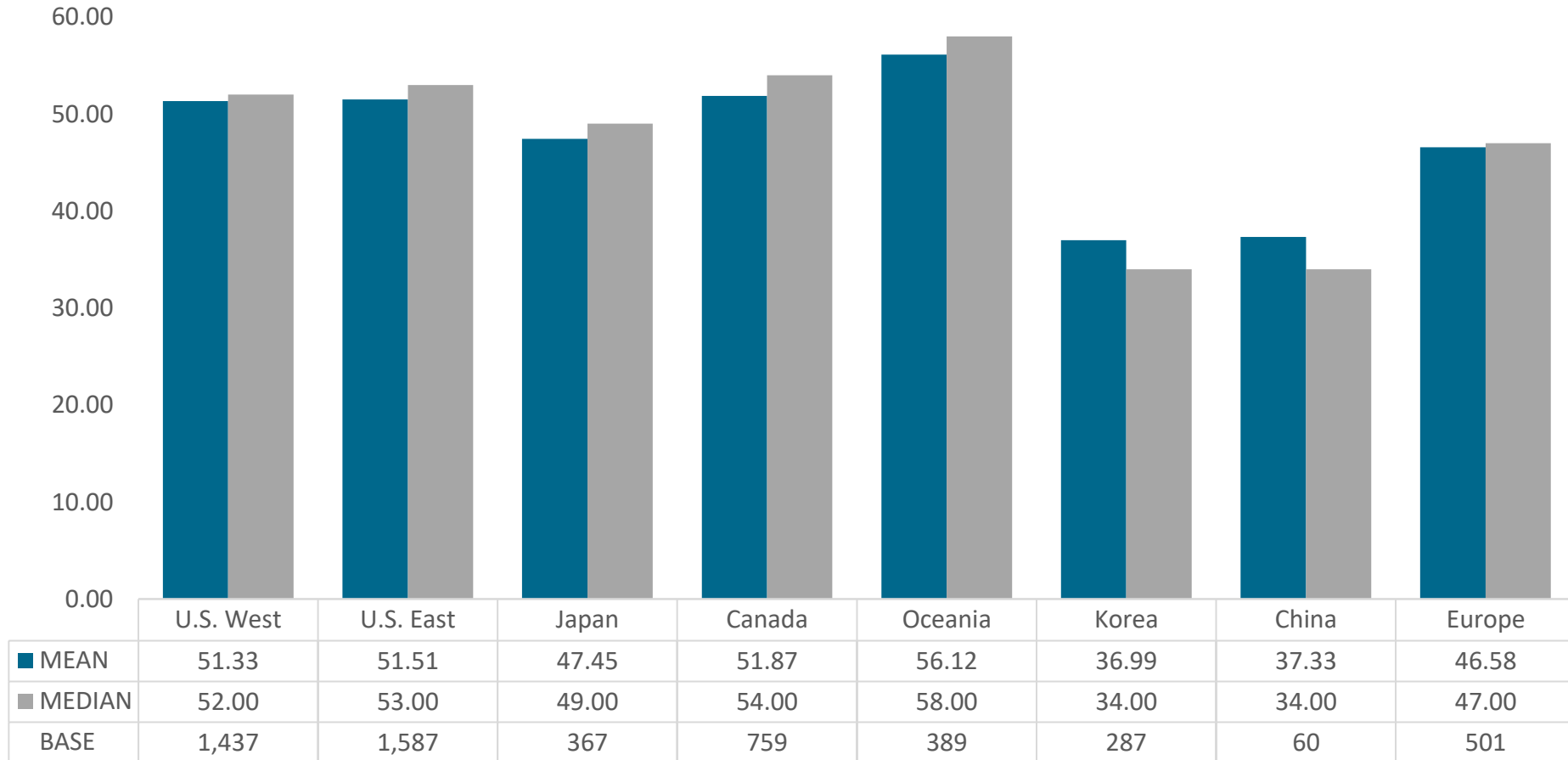
VISITOR PROFILE - HOUSEHOLD INCOME (Korean Won)

	Korean
< ₩16,305,000	9.1%
₩16,305,000-27,173,999	5.8%
₩27,174,000-38,041,999	6.8%
₩38,042,000-48,911,999	11.6%
₩48,912,000-59,781,999	7.6%
₩59,782,000-70,652,999	8.7%
₩70,653,000-81,520,999	12.0%
₩81,521,000-92,390,999	7.9%
₩92,391,000-103,259,999	4.7%
₩103,260,000-149,999,999	12.1%
₩150,000,000-199,999,999	5.5%
₩200,000,000+	8.1%

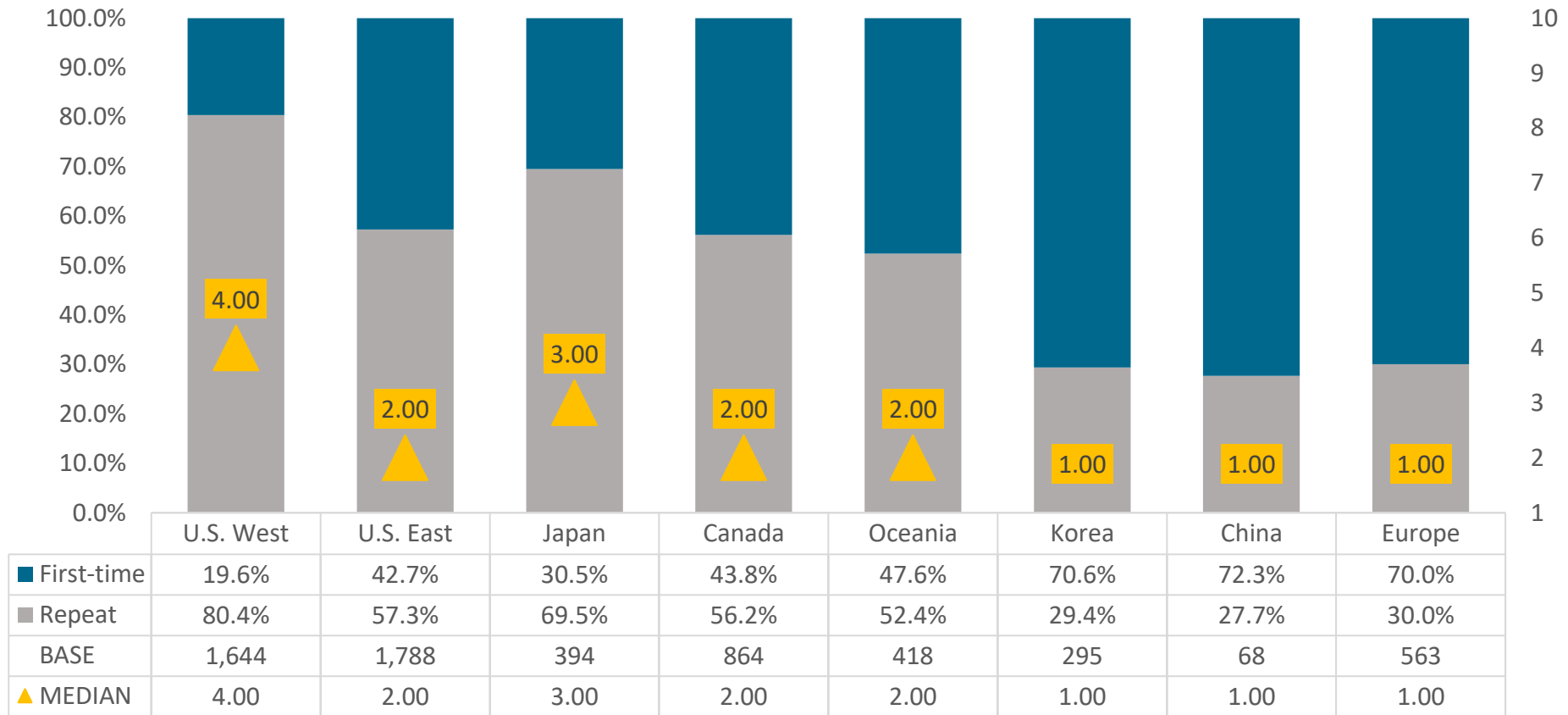
VISITOR PROFILE - HOUSEHOLD INCOME (Chinese Yuan)

	China
<¥250,799	7.5%
¥250,800 – 376,099	22.0%
¥376,100 – 501,399	5.6%
¥501,400 – 626,799	14.8%
¥626,800 – 783,499	3.6%
¥783,500 – 940,199	7.3%
¥940,200 – 1,096,899	7.4%
¥1,096,900-1,253,599	7.3%
¥1,253,600 – 1,560,799	5.6%
¥1,560,800+	19.0%

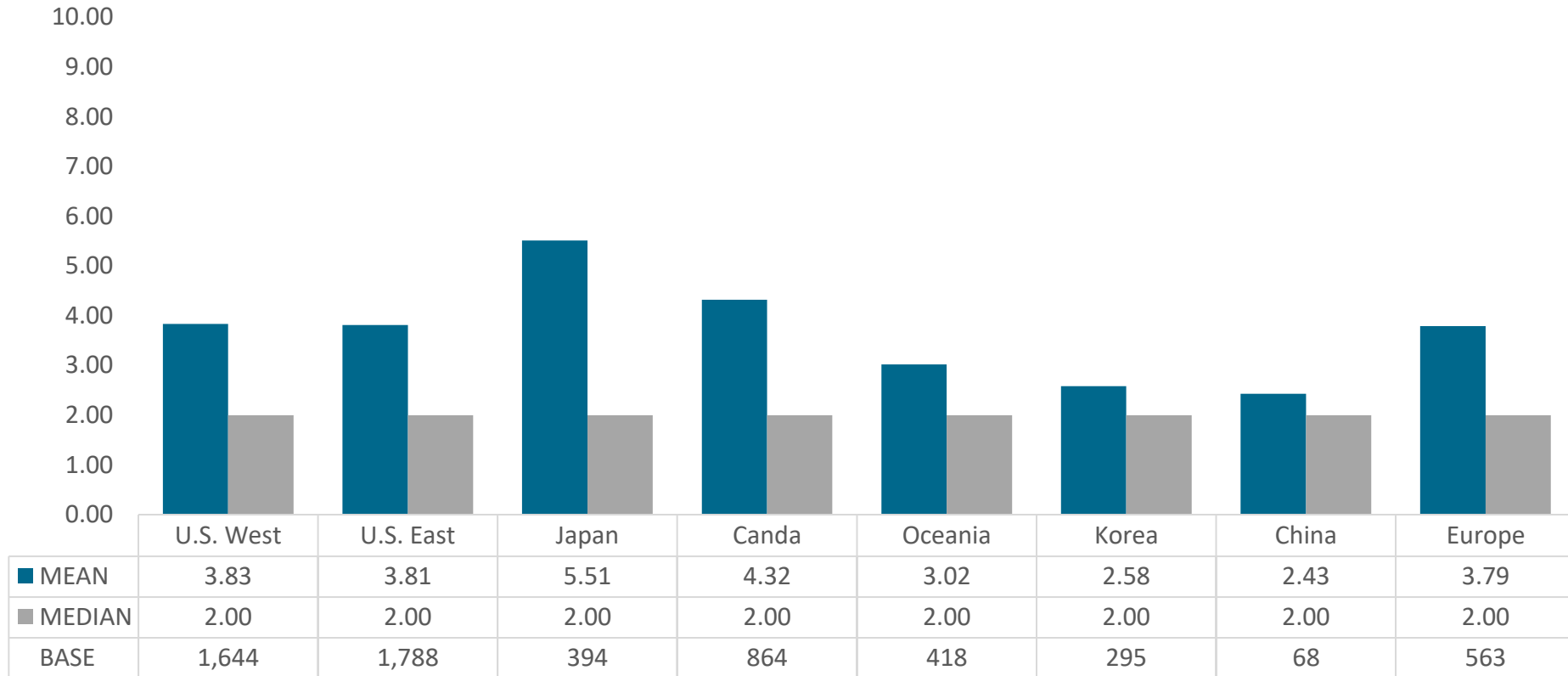
VISITOR PROFILE - AGE



VISITOR PROFILE - TRIPS TO HAWAI'I



VISITOR PROFILE - TRAVEL PARTY SIZE



VISITOR PROFILE - TRAVEL PARTY

	U.S. West	U.S. East	Japan	Canada	Oceania	Korea	China	Europe
My spouse	58.3%	59.8%	60.5%	60.9%	67.1%	66.6%	39.6%	45.6%
Other adult members of my family	30.3%	30.5%	21.3%	29.0%	22.1%	17.1%	22.3%	16.5%
My child(ren)/ grandchild(ren) under 18	28.7%	23.6%	15.7%	19.2%	22.7%	17.3%	11.8%	12.6%
My friends/ associates	14.6%	15.1%	15.6%	17.0%	11.0%	10.5%	18.9%	16.9%
Myself only (traveled alone/ no one else)	9.0%	10.7%	12.6%	7.6%	9.1%	7.8%	20.6%	14.9%
My girlfriend/ boyfriend	7.4%	5.1%	2.2%	5.9%	3.6%	1.7%	6.0%	12.1%
Same gender partner	0.9%	1.1%	0.3%	1.2%	0.4%	0.0%	0.0%	1.4%

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	848	3.37
U.S. East	1,138	2.91
Japan	380	5.03
Canada	431	4.72
Oceania	403	4.88
Korea	59	12.76
China	276	5.90
Europe	441	4.67
All MMAs	3,976	1.55

* 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	286	5.79
U.S. East	400	4.90
Japan	4	49.00
Canada	174	7.43
Oceania	18	23.10
Korea	5	43.83
China	5	43.83
Europe	122	8.87
All MMAs	1,014	3.08

* 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	372	5.08
U.S. East	502	4.37
Japan	8	34.65
Canada	250	6.20
Oceania	20	21.91
Korea	9	32.67
China	11	29.55
Europe	164	7.65
All MMAs	1,336	2.68

* 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	292	5.74
U.S. East	398	4.91
Japan	25	19.60
Canada	223	6.56
Oceania	39	15.69
Korea	55	13.21
China	25	19.60
Europe	150	8.00
All MMAs	1,207	2.82

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

